LGBTQ Travel & Trends

Key Findings from CMI's LGBTQ Community Survey and LGBTQ Tourism & Hospitality Survey

CMI Community Marketing & Insights
Leaders in LGBTQ Research since 1992

Thomas Roth, President

Mahalo

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HAWAI'I TOURISM AUTHORITY

CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992

- San Francisco-based with global clients; founded in 1992.
- 100% LGBTQ-owned and –operated; diversity supplier.
- 25+ years of consumer research, CMI has conducted hundreds of LGBTQ research projects across many industries
- Dedicated research panel of 45,000+ LGBTQ consumers
- Online surveys, focus groups, virtual focus groups, in-depth interviews, intercepts and other methodologies
- Serves corporate, university, organization and government institution clients throughout the USA, Canada, Europe, Asia and Australia

Research, development, communications and marketing strategies.
Proudly serving industry leaders since 1992

Some of CMI's LGBTQ Tourism Research, Education & Marketing Clients

Some of CMI's LGBTQ Research, Education & Marketing Clients

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The Travel Industry and the LGBTQ Community in 2020

You might ask…

Why does the LGBTQ community receive so much attention in the travel Industry?

- ✓ Mostly DINK "Dual Income - No Kids"… but that is changing
- ✓ Travel as part of cultural identity
- ✓ Perception of greater income / wealth
- ✓ Targeted outreach opportunities
- ✓ Exceptionally brand / destination loyal
- ✓ Although only 3-6% of the adult population, surveys show our travel patterns are nearly double the average population.

These shared attributes are what makes LGBTQ an attractive "market."

CMI's 12th Annual LGBTQ Community Survey®
Among 18,531 LGBTQ Participants

"I fear there will be a roll back of recent LGBTQ equality gains in the coming year."

76% Agree

16% Neutral

8% Disagree

Base: All LGBTQ n=18,532

CMI's 12th Annual LGBTQ Community Survey®
Among 18,531 LGBTQ Participants

"Companies that support LGBTQ equality will get more of my business this year."

76% Agree

22% Neutral

2% Disagree

Base: All LGBTQ n=18,531

What are the most common ways that you know if a brand or company is supportive of LGBTQ?

	All LGBTQ
Brand was in the news regarding their support of an LGBTQ issue	77%
Positive word of mouth from LGBTQ friends	58%
Seeing the brand's ad on an LGBTQ website	53%
Seeing the brand's posting on social media	49%
Going to an LGBTQ event that the brand sponsored	46%
Seeing the brand's ad in an LGBTQ magazine	43%
Looking up the brand's HRC Corporate Equality Index Score	28%
Hearing an LGBTQ-friendly celebrity talk about the brand	26%
None of the above	2%
Don't care if a brand or company is supportive of LGBTQ	5%

Base: All LGBTQ n=1,253; 2018 CMI Consumer Products Survey

What are the most common ways that you know if a brand or company is supportive of LGBTQ?

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Base: All LGBTQ n=1,253; 2018 CMI Consumer Products Survey

In the travel industry, it will take more than waving a rainbow flag

I tend to stay at hotel brands that I know are LGBTQ-welcoming.

Today, all the major hotel brands are LGBTQ-welcoming.

Question: Do you agree or disagree with these statements about hotels?
Base: Weighted All LGBTQ Travelers n=4,666

Community Support for All-Gender Restrooms

When you see an "all-gender restroom" sign in a hotel or restaurant, how does it make you feel? See images above.

61% Significantly more positive about the hotel/restaurant

19% Somewhat more positive about the hotel/restaurant

17% Neutral: It makes no difference to me

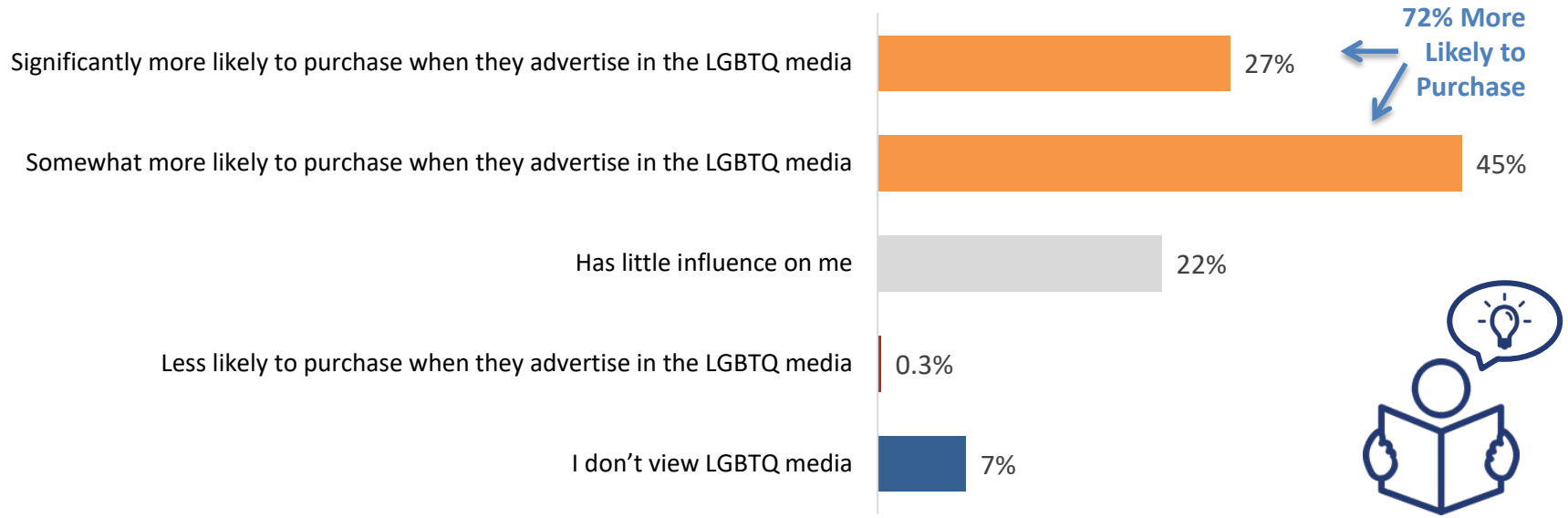
2% More negative about the hotel/restaurant

Base: All LGBTQ n=3,522

Importance of Advertising in the LGBTQ Media: Advertising in the LGBTQ media makes a purchasing difference to 72% of the LGBTQ community.

How are you influenced when companies advertise in the LGBTQ digital and print media?

Among All LGBTQ



Base: All LGBTQ n=11,639

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An Expanding LGBTQ Community.

But are your communications expanding with the community?

In LGBTQ Consumers: How are we the same? How are we different?

LGBTQ is part of diversity.

In LGBTQ Consumers: How are we the same? How are we different?

LGBTQ is part of diversity.

Diversity is part of LGBTQ.

There is No Singular "LGBTQ" Traveler

These people are NOT the same travelers.

- Same-sex couple, urban, no kids, corporate jobs
- Lesbian couple, 60's, retired, lives in Fort Lauderdale
- Single, 22-year queer young adult, first job in London
- Bisexual man in an opposite-sex relationship in Mexico
- Bisexual woman married to a trans man in Seattle
- Transgender woman traveling to a conference
- Gay man, just divorced from his husband, looking for something new
- Young, pansexual, genderqueer, ready to change the world

The LGBTQ Community is Diversifying Over Time

Gay & Lesbian
↓
GLBT
↓
LGBT
↓
LGBTQ
↓
LGBTQ+
LGBTQIA+
LGBTQ2+
↓
???

- Lesbian or Gay Woman
- Gay man
- Bisexual woman
- Bisexual man
- Pansexual
- Asexual
- Non-binary sexual orientation
- Same Gender Loving
- Heterosexual / Straight man
- Heterosexual / Straight woman
- Questioning
- Other: Please tell us

- Female
- Male
- Transgender
- Transsexual
- Trans Man
- Trans Woman
- Intersex
- Non-binary gender identity
- Genderqueer
- Gender Fluid
- Agender
- Questioning
- Other: Please tell us

- Queer
- Straight Ally
- Other: Please tell us

GREATER FORT LAUDERDALE
CONVENTION & VISITORS BUREAU

GREATER FORT LAUDERDALE
CONVENTION & VISITORS BUREAU

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LGBTQ MILLENNIAL TRAVEL TO FORT LAUDERDALE

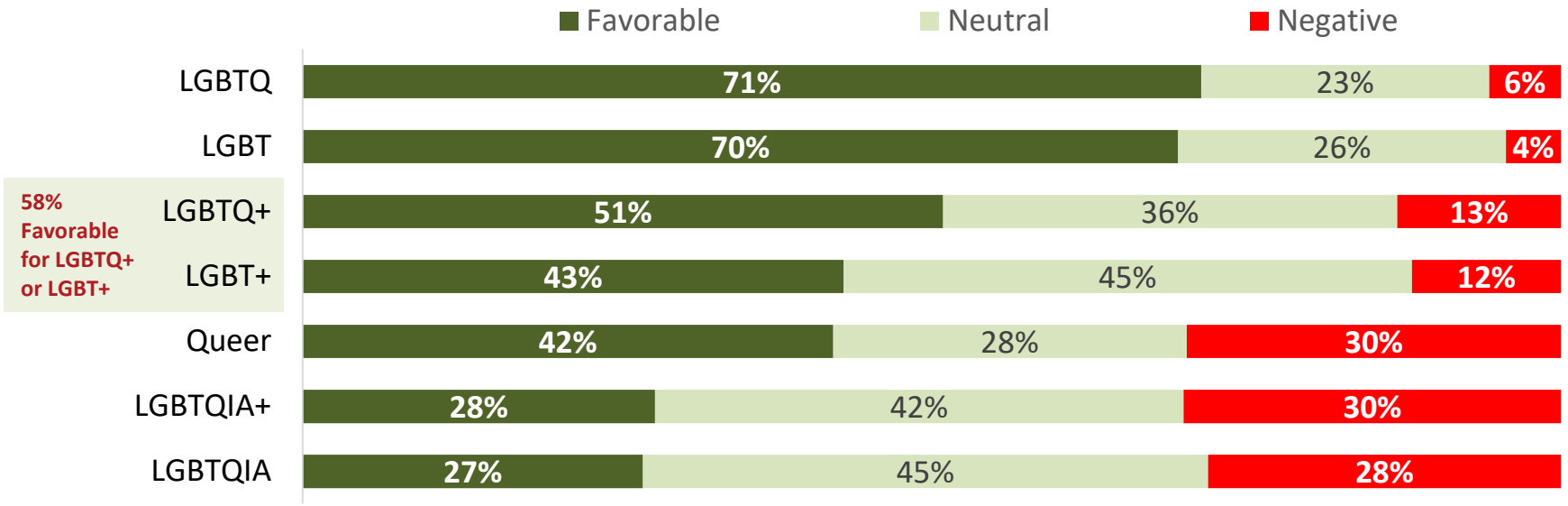
CMI MARKET INTELLIGENCE REPORT
JANUARY 2017

Produced by:
CMI Community Marketing & Insights

2019 Update: Terminology within the LGBTQ Community

The following terms are often used to describe our community. Please rate how you feel about each, when you see them used by corporations, non-profits or in the media.

My opinion of the use of the terms… ***For all LGBTQ Participants***

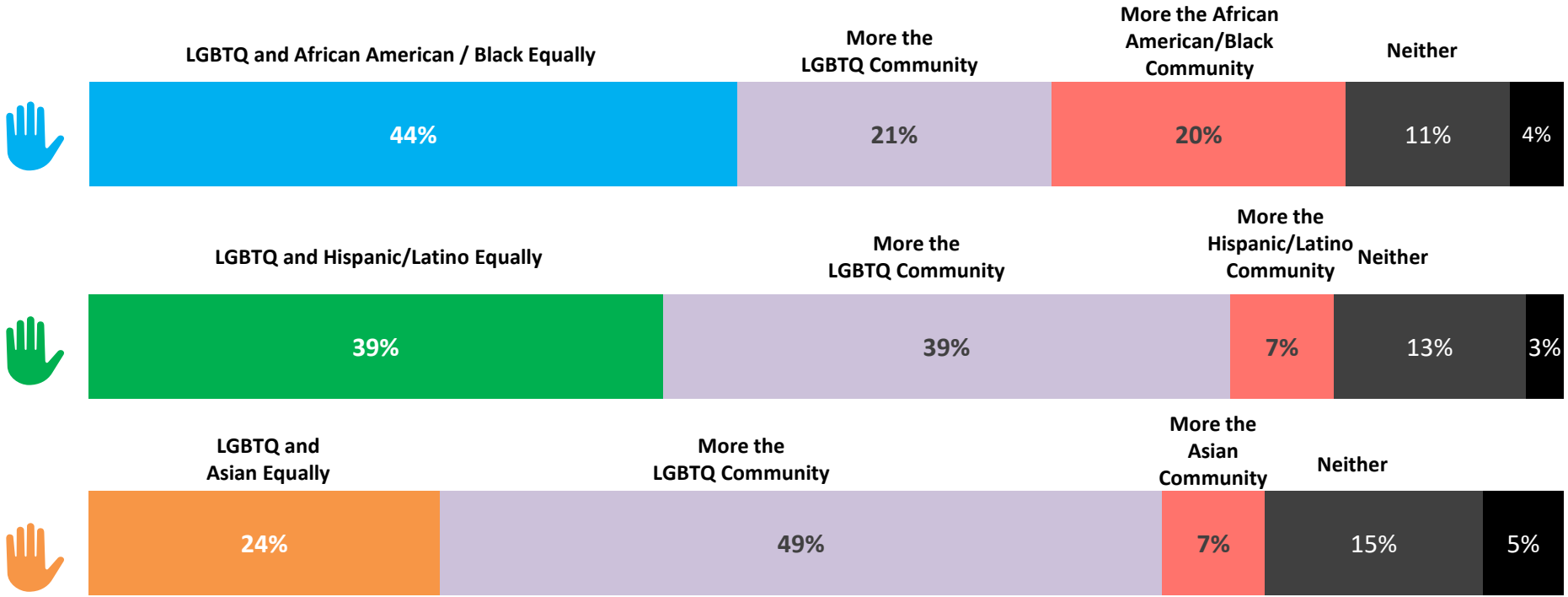


Base: All LGBTQ n=11,639

Language matters in the LGBTQ community. Let's talk about some terms.

OK	LGBT, LGBTQ, LGBT+, LGBTI (and the many variations)
	sexual orientation, gender identity, LGBTQ-friendly, marriage equality
NOT OK	GLBT, sexual *preference, preferred pronouns, alternative* lifestyle,
	your friend, those people, that market,
	transgendered, homosexual, "gay marriage," "born female"
Caution	Queer, Lifestyle Use of pronouns, ladies and gentleman, Mr. and Mrs. Gay neighborhood, gay-friendly and overuse of the word "gay" in materials

Intersectionality: Do you connect more with the (community listed), the LGBTQ community, or both? Please mark the one that best applies.



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LGBTQ Demographics and Why they Matter

LGBTQ Demographic Dynamics

Mobility: LGBTQ people are less likely to live where they grew up, which perhaps makes them less "stuck."

Relationship Status: Men more likely to be single, women more likely in relationship, gender expansive in-between by percentage. Men are able to be more impulsive in purchasing.

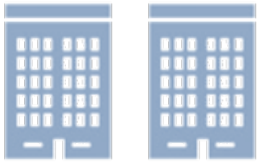
Parents: Lesbian and bisexual women are far more likely to be parents.

Discrimination: Discrimination against the transgender community affects purchasing power.

LGBTQ as a Culture: 78% said they are a proud member of the 'LGBTQ Community"

We Live in All Types of Communities

How would you best describe the community in which you live?



Big or medium size city / urban area

35%
of all LGBT participants

Suburb of a big or medium size city

30%
of all LGBT participants

Small Communities*

35%
of all LGBT participants

Freddie Mac Study, Bases: All LGBT n=2,313;

TYPE OF TRAVELER: LGBTQ travelers tend to be more moderate-price travelers, although there are some gender and generational differences.

TYPE OF TRAVELER

Q In the past year, if you had to pick one, what type of price point traveler are you?

TRAVELER TYPE	All LGBTQ	Gay & Bi Men	Lesbian & Bi Women	Gender Expansive
5 - Luxury traveler	4%	5%	2%	0%
4 - Moderate price traveler, with a little luxury	32%	36%	28%	21%
3 - Moderate price travel	24%	25%	25%	16%
2 - Budget traveler with an occasional splurge	29%	24%	34%	41%
1 - Budget / economy traveler	11%	10%	11%	21%

Base: *(Weighted)* All LGBTQ n=3,633; Gay & Bi Men n=2,242; Lesbian & Bi Women n=1,116; Gender Expansive n=275; Millennials n=1,183; Gen X n=1,203; Boomers n=1,247

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Some Additional Research Insights to Support Your Communications

Some destination/tourism bureaus have "LGBTQ sections" on their websites.
Q: "Do you agree or disagree with these statements?"

% in Agreement

	Gay & Bi Men	Lesbian & Bi Women	LGBTQ Millennials	LGBTQ Gen X	LGBTQ Boomers
Having an LGBTQ website makes me feel that the tourism bureau is LGBTQ-friendly.	91%	92%	91%	92%	92%
Having an LGBTQ website makes me more likely to visit a destination.	74%	73%	75%	73%	72%
LGBTQ sections on tourism bureau websites are no longer needed.	11%	9%	9%	10%	10%

Base: Varies by statements

CMI's 23rd Annual LGBTQ Tourism & Hospitality Survey

Are you forgetting about *Generation X?* At age 37 to 54, with income and vacation time, they may be your best customers.

Total of all Overnights Trips • Business and Leisure

Millennials	6.0 trips last year
Gen X	6.5 trips last year
Baby Boomers	5.5 trips last year

CMI's 23rd Annual LGBTQ Tourism Report
Base: All LGBTQ North American Travelers n=5,709

INTERNATIONAL TRAVEL BY U.S. LGBTQ TRAVELERS

Do you have a valid passport?

Among All LGBTQ

YES: 77%

NO: 23%

Did you use your passport in the last 12 months for international travel?

Among those who have a valid passport

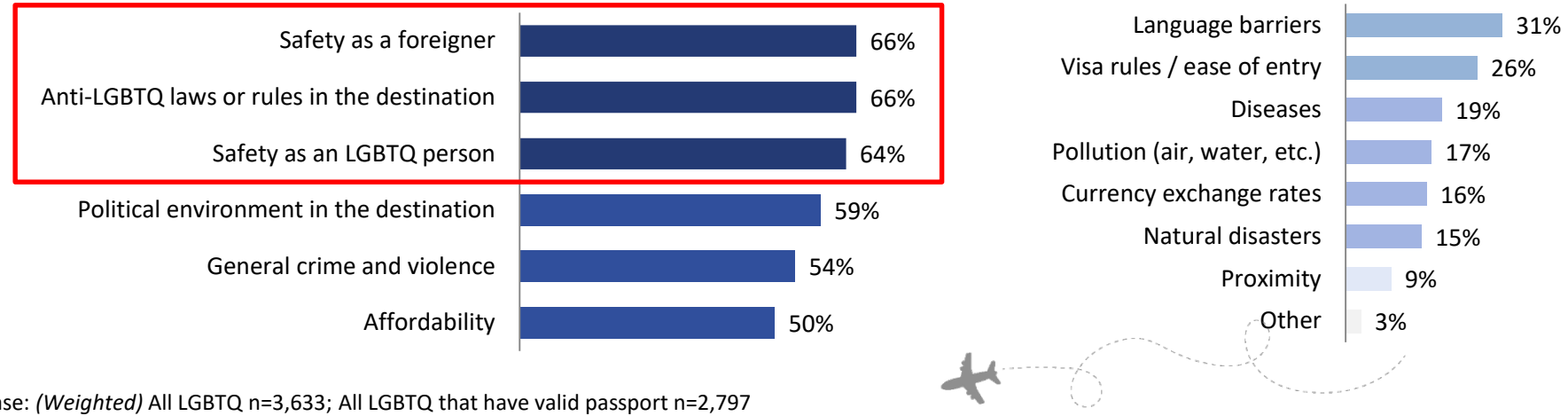
Yes, for travel to another country	53%
No, I did not travel to another country	47%

Base: *(Weighted)* All LGBTQ n=3,633; All LGBTQ that have valid passport n=2,797

INTERNATIONAL TRAVEL

What are the issues that concern you the most when selecting an international travel destination? (Please mark all that apply.)

Among All LGBTQ who have a valid passport and used it for international travel in the past year



Base: *(Weighted)* All LGBTQ n=3,633; All LGBTQ that have valid passport n=2,797

LGBTQ Events Motivate Tourism

- ✓ LGBTQ events are major drivers for awareness and visitation.
- ✓ Event visitors often spend more nights than leisure or business travelers.
- ✓ These events encourage both air arrivals and inner-ring drive visitors.

Pride? Great!... What is your *2nd LGBTQ Event?*

- ✓ Every destination should develop at least two LGBTQ tourism events.
- ✓ The 2nd event should be more unique to your destination.
- ✓ There is a role for tourism offices in LGBTQ event development.

LGBTQ Events Motivate Tourism

- LGBTQ cultural, arts or film events
- LGBTQ professional association meetings or conferences
- LGBTQ sports tournaments or events
- Leather or fetish events
- LGBTQ dance or music events
- Lesbian or women's events attended by LBTQ women
- Transgender community events
- Bear events
- LGBTQ family events
- LGBTQ university student conferences
- LGBTQ religious communities
- African American / Black LGBTQ community events
- Asian/South Asian LGBTQ community events
- Latino / Hispanic LGBTQ community events
- LGBTQ outdoor enthusiast events
- *And many more!*

Base: All LGBTQ n=4,096; Gender Expansive n=628; LBTQ Women n=1,354; Lesbian n=918; Gay & Bi Men n=2,206; Black/African American n=228; Asian/Pacific Islander n=256; Latino/Latina/Latinx n=328

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LGBTQ Travel Surveys
HTA Sponsored Questions

HAWAI'I TOURISM AUTHORITY

CMI Community Marketing & Insights
Leaders in LGBTQ Research since 1992

24th Annual LGBTQ Tourism & Hospitality Survey

Hawai'i Tourism Authority

Sponsored Questions
December 2019

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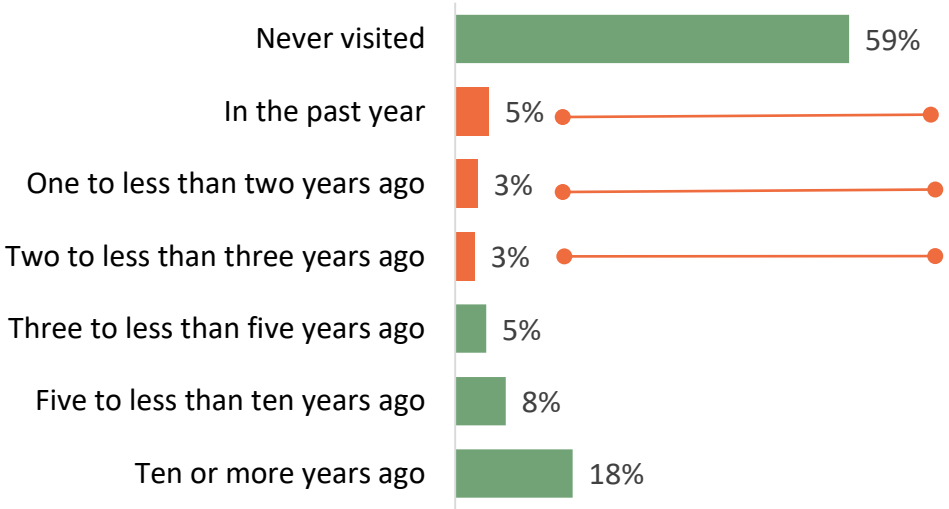
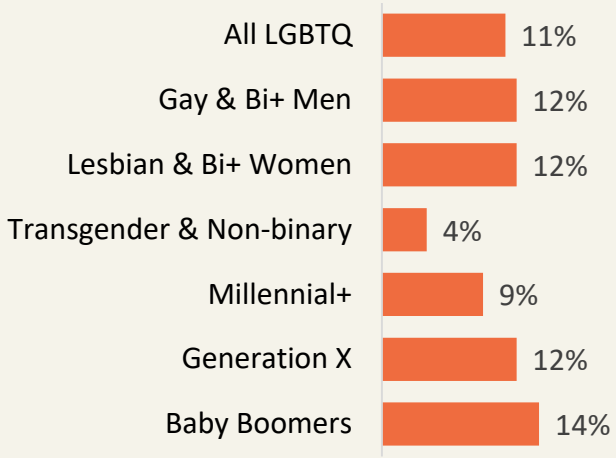
Hawai'i Visitation: Most LGBTQ study participants have never visited Hawai'i before. Reviewing for past three-year visitation, 11% of all LGBTQ participants visited Hawai'i, about equal for men and women. Visitation is stronger among older participants.

When is the last time you visited Hawai'i?
Among All LGBTQ Travelers



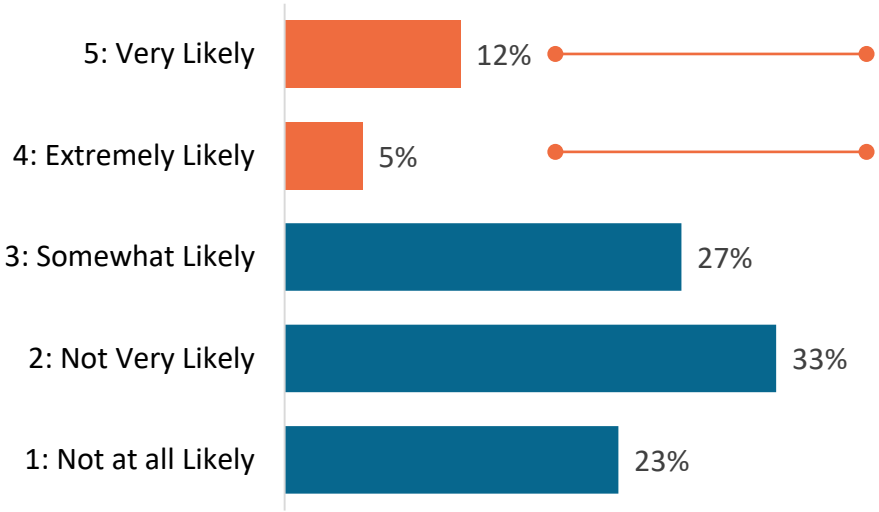
Past Three Year Visitation

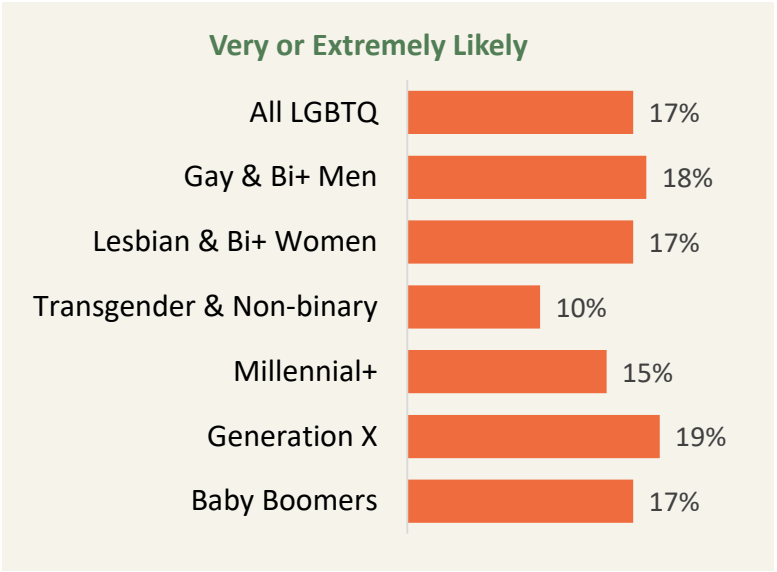


Base: All LGBTQ n=5,019

Hawai'i Future Visitation: 17% of participants indicated that they are very or extremely likely to visit Hawaii in the next 2 years. Again, men and women are about equal. By age, Generation X had the strongest favorable response.

Please indicate how likely you are to visit Hawai'i in the next 2 years.
Among All LGBTQ

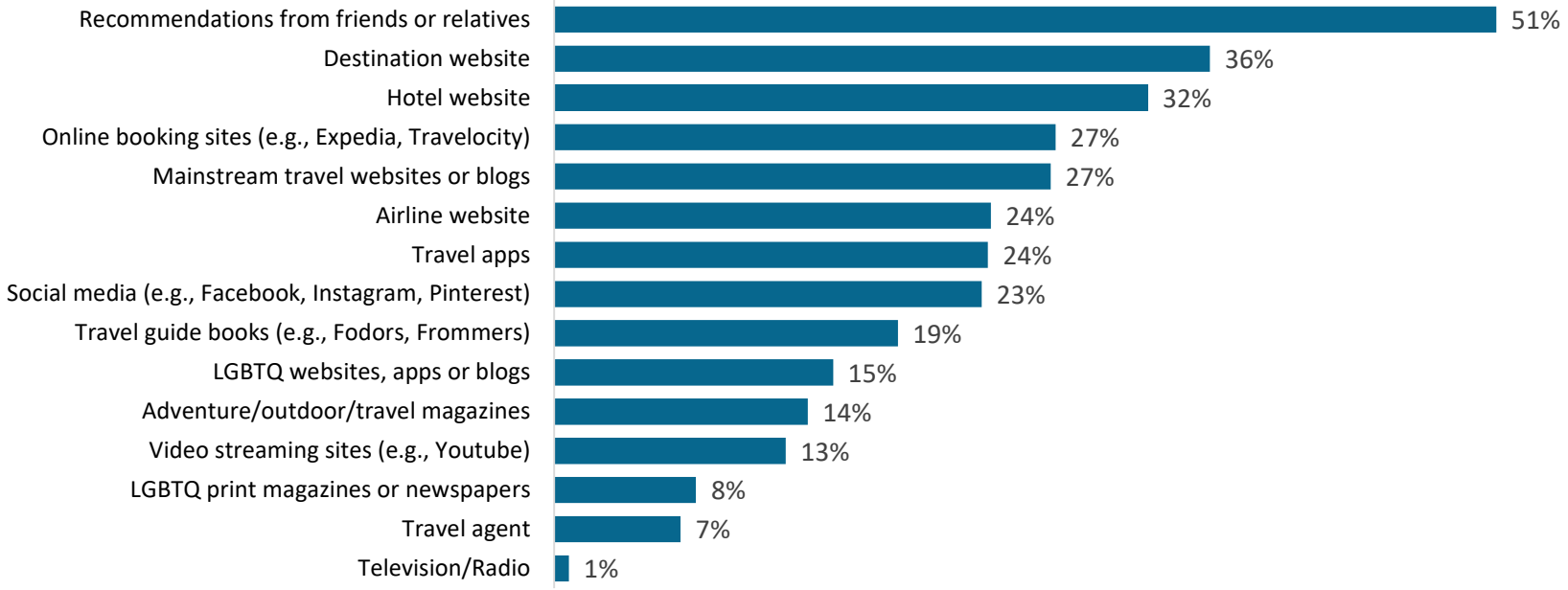




Base: All LGBTQ n=5,019

Researching Hawai'i

"In the past 2 years, which of the following sources did you use to research your trip to Hawai'i? Please mark all that apply."
Conditionally Shown to Hawai'i Visitors in the Past 2 Years

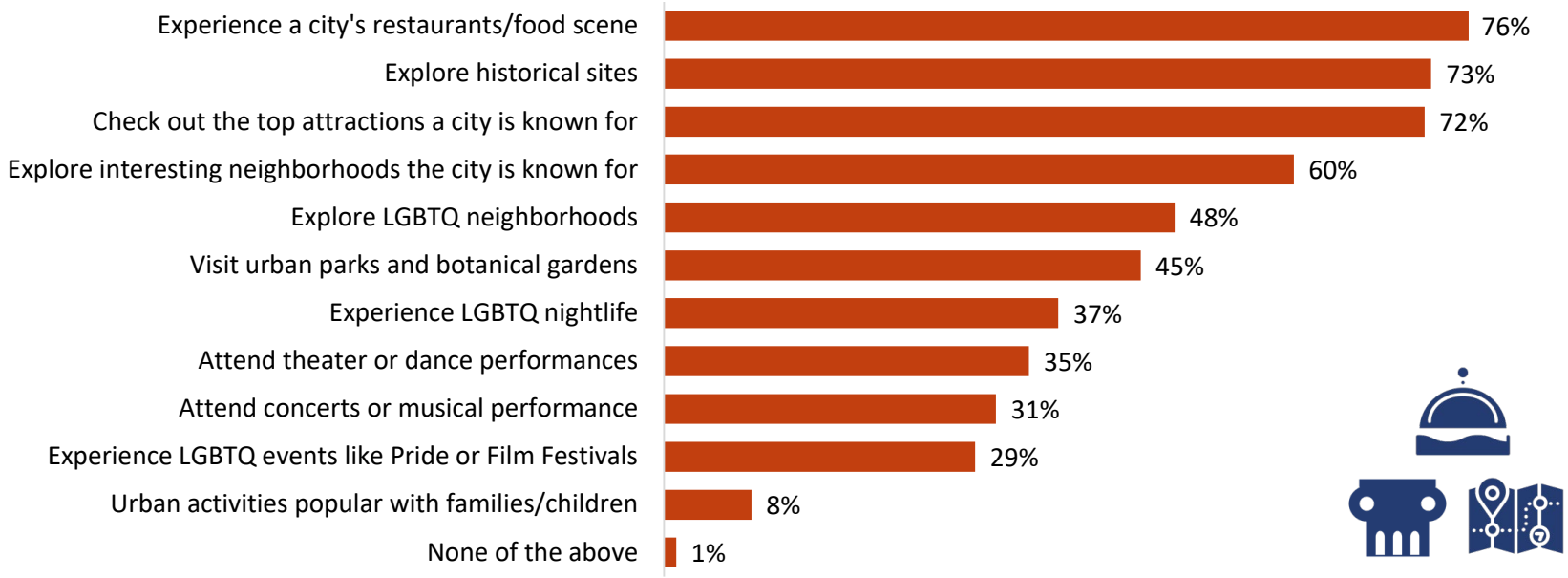


None of the above 11% and Other 12%

Base: Hawai'i past 2-year visitors, n=420

GENERAL URBAN TRAVEL MOTIVATIONS: Hawai'i visitors are most interested in a city's food scene, followed by historical sites and a city's top attractions. Interesting neighborhoods were also important.

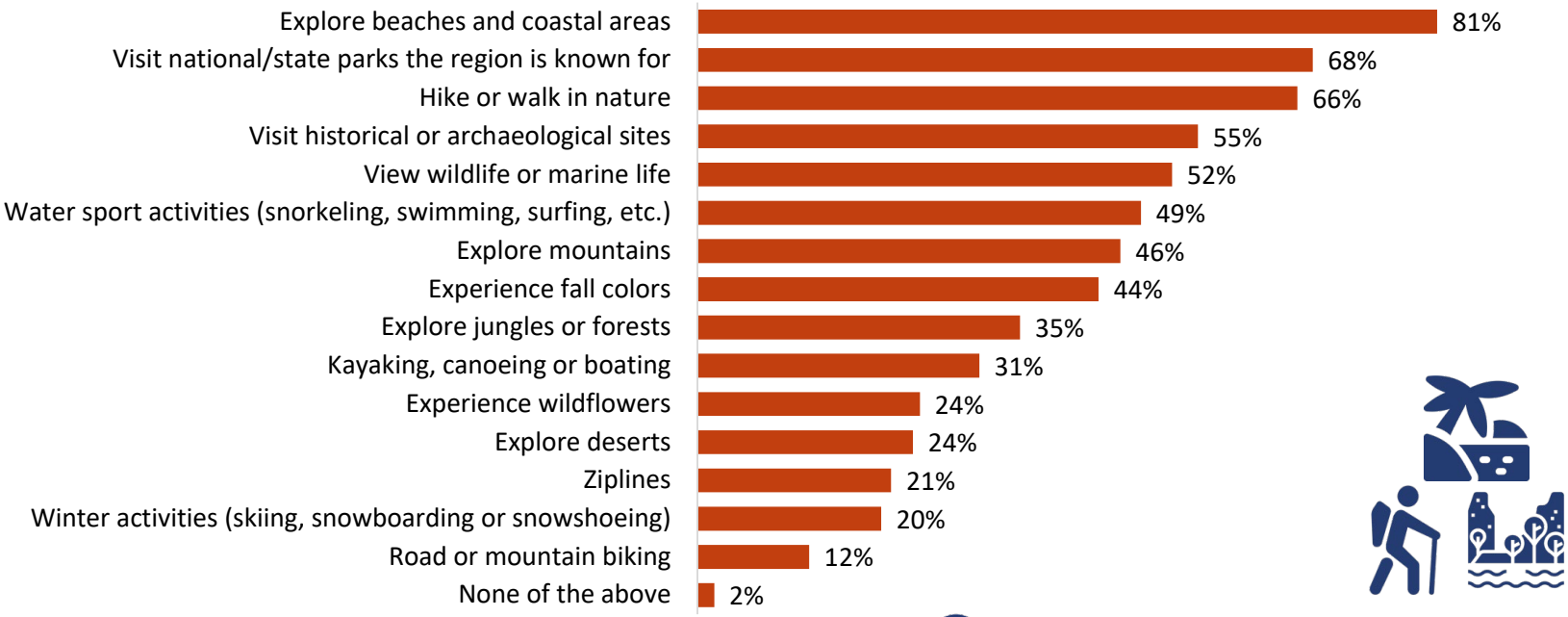
When you think of a vacation to an urban destination, what activities attract you the most? Please mark all that apply.
Among All LGBTQ Travelers



Base: LGBTQ visitors to Hawaii in past three years n=577

GENERAL OUTDOOR TRAVEL MOTIVATIONS: Hawai'i visitors are most interested in beaches and coastal areas. The beach/coastal response was epecially encouraging because this question was not asked specifically about Hawai'i. National parks and hiking were also important as an outdoor vacation motivator.

When you think of outdoor or natural-based vacations, what activities attract you the most? Please mark all that apply.
Among All LGBTQ Travelers



LGBTQ visitors to Hawaii in past three years n=577

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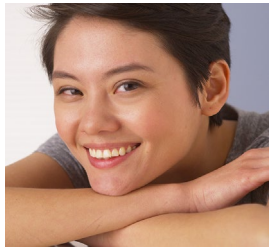
Unlocking the Potential of the LGBTQ+ Asia Travel Market

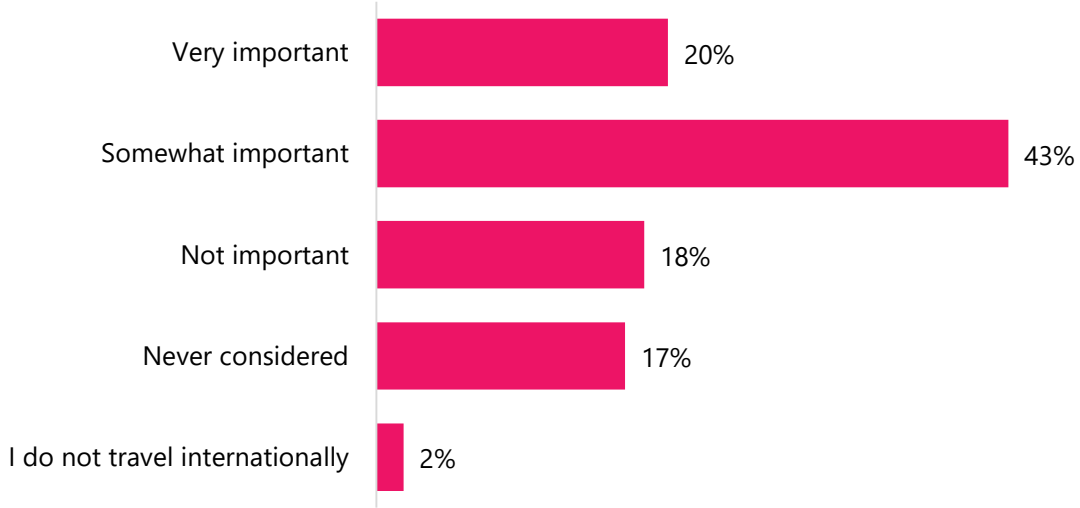
Mainland China • Hong Kong • Taiwan • Japan • Thailand



Being Out In Asia, And How that Influences Travel

Importance of LGBTQ+ Welcoming Destinations: 63% of the participants from the five Asian countries/regions thought that it is important that a destination they are traveling to is known as LGBTQ+ welcoming. Participants in Japan lagged on this importance, which was true for both younger and older Japanese participants. LGBTQ+ welcoming was especially important to transgender and non-binary participants.

When picking a destination outside of your country or region for vacation, how important is it to you that the destination is known to be LGBTQ+ welcoming and popular for LGBTQ+ travelers?



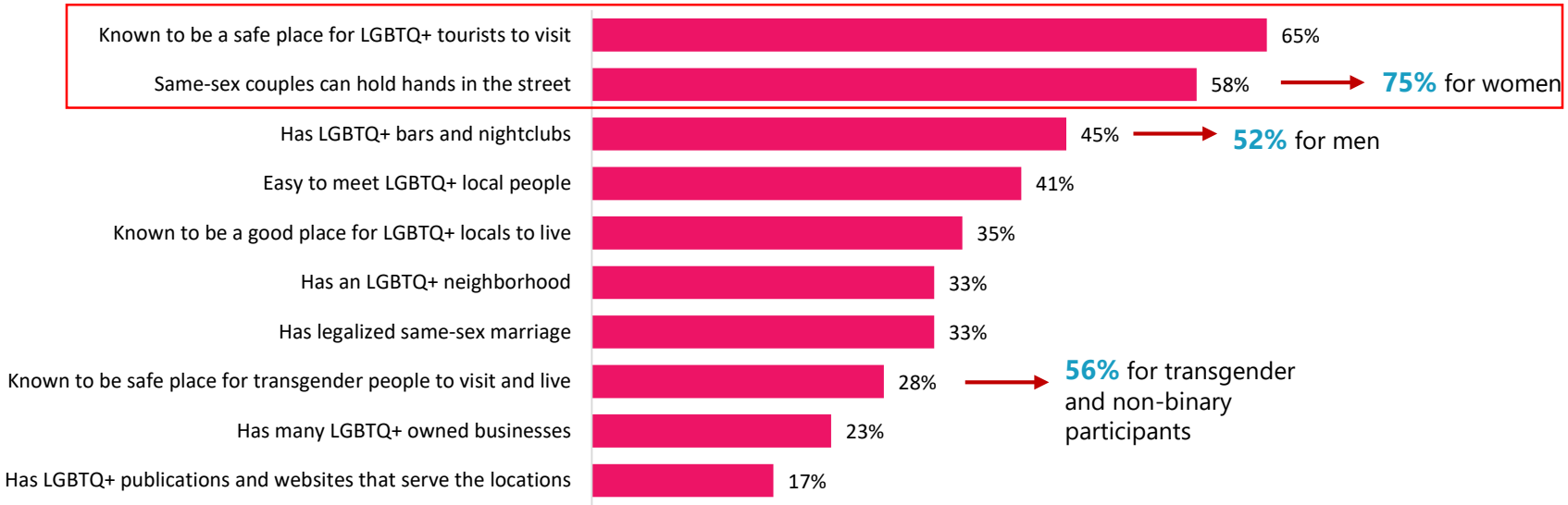
Very or Somewhat Important	
Lesbian & Bi+ Women	66%
Gay & Bi+ Men	62%
Transgender & Non-binary	70%
Under Age 35	64%
Age 35 and Over	61%
Mainland China	68%
Hong Kong	64%
Taiwan	72%
Japan	51%
Thailand	78%

Base: All LGBTQ+ Participants n=3,009. See methodology for segment participation.

LGBTQ Reasons to Pick a Destination: Participants who thought that it was important for a destination to be LGBTQ+ welcoming listed their top priorities. LGBTQ+ safety was the most important concern, followed by an atmosphere where same-sex couples can hold hands in the street. LGBTQ+ bars and nightclubs ranked well, which might be a function of the overall younger age of the participants and the proportion of participants who identify as male.

Which of these LGBTQ+ reasons are important to you in choosing a destination for vacation? Please mark all that apply.

Of those that thought it is important that a destination is known to be LGBTQ+ welcoming and popular for LGBTQ+ travelers



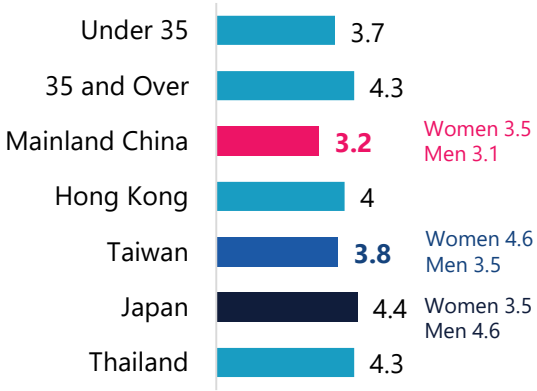
Base: Important to be LGBTQ+ welcoming n=1,642

Asian LGBTQ+ Travel by the Numbers

Vacation by the Numbers: On average, the participants took 3.9 vacation trips, 2.5 round trip flights and spent 8.1 nights in paid accommodations in the past 12 months. Those age 35 and over outperformed their younger peers in all categories. By gender, lesbian & bi+ women in mainland China and Taiwan took more vacation trips and spent more nights in paid accommodations, while in Japan, gay & bi+ men are more active travelers.

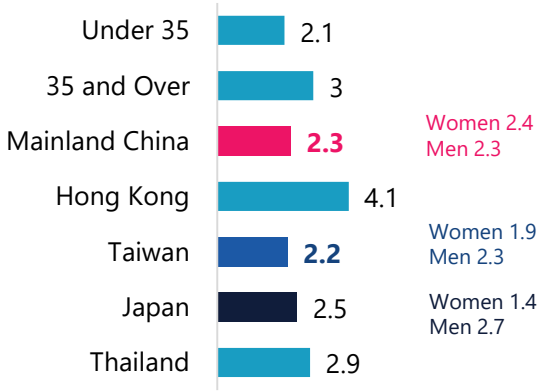
Vacation or Leisure Trip

Avg. vacation trips taken in the past 12 months



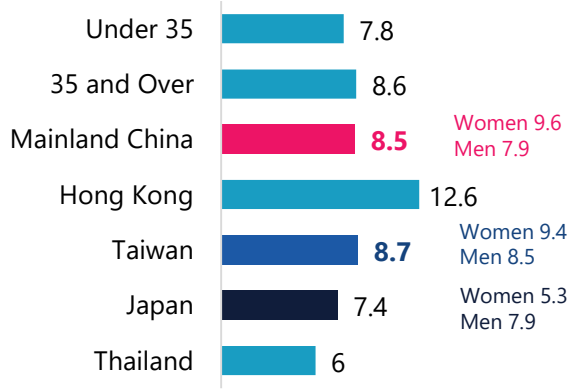
Total Number of Round-trip Flights

Avg. number of round trip flights taken in the past 12 months for vacation



Total Number of Nights in Any Paid Accommodation

Avg. nights in paid accommodation in the past 12 months for vacation



Base: All LGBTQ+ Participants n=3,009. See methodology for segment participation.

HAWAI'I TOURISM AUTHORITY

Hawai'i Tourism Authority Sponsored Questions

Mainland China • Hong Kong • Japan • Taiwan • Thailand

Travel to Hawai'i: The research points to significant LGBTQ travel to Hawai'i from Japan residents, but more limited from the other countries/regions. Travel from Mainland China is especially weaker. Age seems to play a role in likelihood to have ever visited Hawai'i. For Japan, men and women have "ever traveled" to Hawai'i near equally.

Have you ever visited the islands of Hawai'i?
Among Those with International Travel Experience or Intend to Travel Internationally

All Participants	All LGBTQ	All Women	All Men	All Gender Expansive	All Under Age 35	All Age 35 and Over	All Mainland China	All Hong Kong	All Taiwan	All Japan	All Thailand
Yes	15%	8%	18%	8%	7%	30%	2%	10%	6%	35%	5%
No	85%	92%	82%	92%	93%	70%	98%	90%	94%	65%	95%

Japan Only	All LGBTQ	All Women	All Men	All Gender Expansive	All Under Age 35	All Age 35 and Over
Yes	35%	33%	36%	22%	22%	44%
No	65%	67%	64%	78%	78%	56%

Base: n=2,734. See methodology for segment participation.

Last Visit to Hawai'i

Think about your last trip to Hawai'i, what experiences did you most enjoy? Please mark your top three.
Have Ever Visited Hawai'i • Note the low base for all regions except Japan

All Participants	All Mainland China	All Hong Kong	All Taiwan	All Japan	All Thailand
The beaches	71%	69%	78%	58%	79%
The overall beauty	41%	38%	43%	48%	57%
Shopping	59%	15%	27%	35%	0%
I felt safe	12%	23%	32%	31%	29%
Outdoor activities*	41%	54%	46%	24%	21%
Cuisine	29%	8%	19%	24%	21%
My hotel	35%	8%	16%	24%	7%
Hawai'i was very LGBTQ+ friendly	6%	15%	5%	5%	21%
Other	0%	8%	3%	3%	7%
None of the above	0%	0%	0%	4%	7%
Base	*17*	*13*	*37*	*342*	*14*

*Outdoor activities (e.g. water sports, hiking, exploring quaint towns)

Japan Only	All Women	All Men	All Under Age 35	All Age 35 and Over
The beaches	55%	59%	63%	57%
The overall beauty	61%	47%	52%	47%
Shopping	36%	34%	29%	37%
I felt safe	27%	32%	26%	33%
Outdoor activities*	24%	23%	37%	20%
Cuisine	36%	23%	30%	22%
My hotel	12%	24%	24%	23%
Hawai'i was very LGBTQ+ friendly	6%	5%	2%	6%
Other	3%	3%	2%	3%
None of the above	3%	4%	2%	4%
Base	*33**	*299*	*82**	*260*

*Low bases

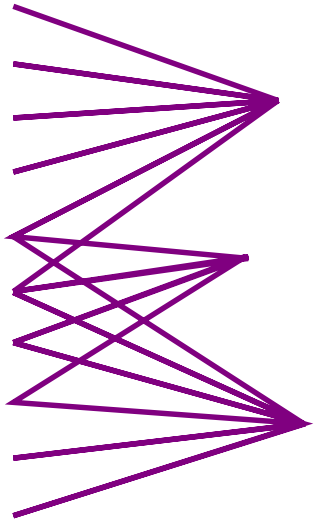
6

In conclusion:
Resources and Follow-up

Outreach: Specific to Destination, Budget and Goals

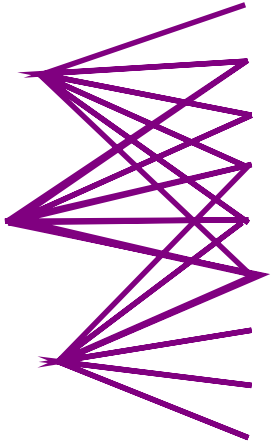
MARKETS

- L, G, B or T
- Older
- Younger
- Ethnic
- West Coast
- East Coast
- Single
- Couples
- Families



OPPORTUNITIES

- Leisure Travel
- LGBTQ Events
- General Events
- Weddings
- Honeymoons
- Business Travel
- Meetings
- Conferences



COMMUNICATIONS

- Print
- Internet
- Social media
- Mobile
- Influencers
- Media relations
- TV and Radio
- Community involvement

Learn more about LGBTQ Tourism Opportunities:

Research reports for free download on www.CMI.info

Annual LGBTQ Community Survey:
Since 2007
32,000 Participants
In 130 countries

Annual LGBTQ Tourism Study:
Since 1994
7,500 Participants

IGLTA

ADVANCING LGBTQ+ TRAVEL

Follow up:
For links to download this presentation, our reports, or for opportunities to work together please pass me a business card, or email tom@CMI.info

Mahalo!

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