

# CMI's 20<sup>th</sup> Annual Survey on LGBT Tourism & Hospitality

U.S. Overview Report  
December 2015

*Sponsored by*



# ABOUT US

*OVER 20 YEARS OF LGBT INSIGHTS*



- › Community Marketing & Insights (CMI) has been conducting LGBT consumer research for over 20 years. Our practice includes online surveys, telephone interviews, intercepts, focus groups (on-site and online), and advisory boards in North America and Europe. Industry leaders around the world depend on CMI's research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, measurable marketing planning and assessment of return on investment.
- › Key findings have been published in the New York Times, Washington Post, Chicago Tribune, Los Angeles Times, Wall Street Journal, Forbes, USA Today, Chicago Tribune, Miami Herald, CBS News, CNN, NPR, Associated Press, eMarketer, Mashable and many other international, national and regional media.
- › CMI's research clients include leaders from a wide range of industries. In the past few years, studies have been produced for these and many other clients: Hyatt Hotels, Aqua Hotels, Starwood Hotels and Resorts, VISIT FLORIDA, Visit Orlando, Greater Fort Lauderdale CVB, Visit Philadelphia, Palm Springs Bureau of Tourism, Travel Portland, NYC & Co., Empire State Development Corp., Choose Chicago, Tourism Toronto, Hawaiian Airlines, Prudential, Wells Fargo Bank, Aetna, Target Brands, Hallmark, DirecTV, Johnson & Johnson, WNBA, American Cancer Society, Kaiser Family Foundation and numerous other corporations and organizations across North America and around the world.



# RESEARCH DESIGN

*OVER 20 YEARS OF LGBT INSIGHTS*

## Who Did We Survey?

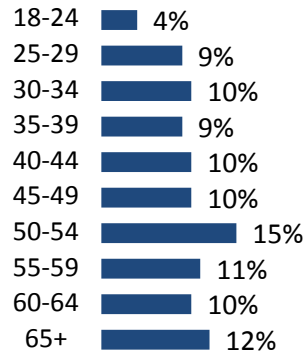
- › 4,662 total respondents completed the survey. This report focuses on United States data for 3,772 self-identified members of the LGBT community.
- › The CMI panel reflects the readership/membership of this broad range of LGBT focused media outlets, organizations and events. This means that the results summarized here are highly representative of LGBTs interacting with LGBT media and organizations in the United States.

## What Was the Methodology?

- › 10 minute online survey conducted in November-December of 2015.
- › Respondents were entered into a drawing for one of twenty \$50 prizes (in cash, or donated to the charity of their choice) in recognition of their time to participate in the study.
- › The report separates results by generation, and gender where significant differences were observed. Generation results reported as midpoint of male and female results by generation.

# U.S. Respondent Profile

## Age



## Identity

Multiple responses were permitted.

Gay Man	57%
Lesbian or Gay Woman	32%
Bisexual Woman	7%
Bisexual Man	4%
Transgender	2%

## State of Residence

Participation from all 50 states.  
Top five states by percentage.

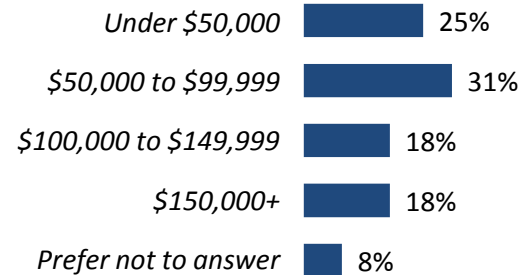
California	17%
Texas	8%
Florida	7%
New York	7%
Illinois	5%

## Relationship Status

Multiple responses were permitted.

Single	34%
Married	31%
In a committed relationship and living with partner	19%
In a committed relationship but not living with partner	9%
Civil union or domestic partner	3%
Engaged to be married	3%

## Household Income



Base: All LGBT USA n=3,772 Findings are presented by gender or generation when differences are noted.

20<sup>th</sup> Annual Survey on  
**LGBT Tourism & Hospitality**  
U.S. Overview Report December 2015

# LGBT TRAVEL IN 2015

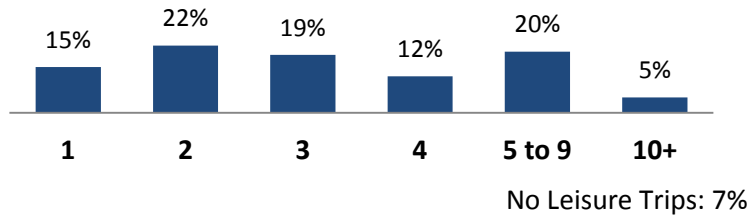


**Overall Travel:** Compared to 2014, there was no significant change in the number of reported LGBT leisure trips, business trips, airplane flights or hotel nights in 2015.

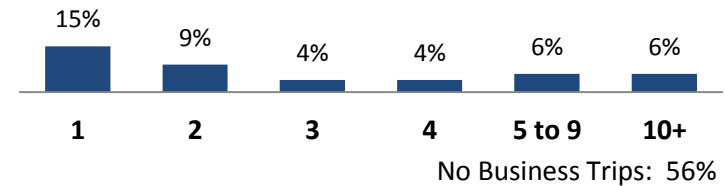
Past 12 Month Travel



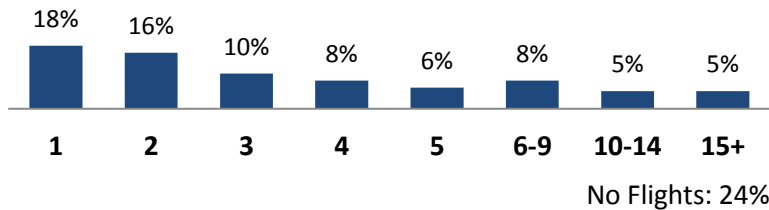
**Leisure/Vacation/Holiday Travel**  
*Number of Trips Taken*



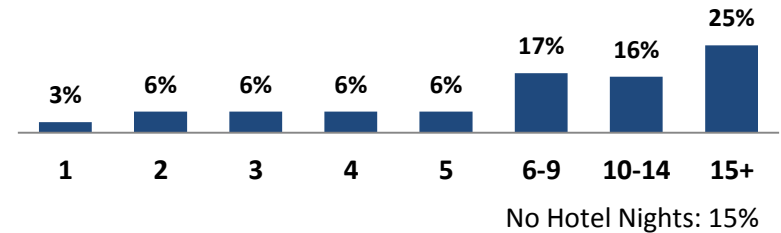
**Business Travel**  
*Number of Trips Taken*



**Number of Flights for Leisure**  
*Number of Round Trip Flights Taken*



**Hotel Nights for Leisure**  
*Number of Hotel Nights Purchased*



Bases: All USA LGBTs n=3,772; All USA LGBTs (Flights) n=3,753; All USA LGBTs (Hotel) n=3,761

**Honeymoons:** Hawaii is the most popular destination for LGBT honeymoons. However even though the destination has the highest percentage, Hawaii is only 8% of the total honeymoons. Overall, the destinations are quite dispersed, with a high number of beach destinations worldwide, mixed with urban core destinations in North America and Europe. Beach destinations are clearly preferred for same-sex honeymoons.

Please write the destination you traveled to or plan to travel to on your honeymoon.  
*Among Married in Past Year or Engaged (United States and Canadian Residents)*



#### Top Destinations Provided

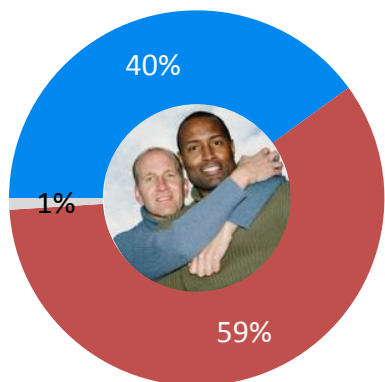
Any Destination in Hawaii	8%
Any Destination in Florida	7%
Any Destination in Mexico	5%
Any Destination in Canada	3%
Any Destination in France	3%
Las Vegas	3%
Australia	2%
Any Caribbean Destination	2%
San Francisco	2%
Any Destination in Spain	2%
Any Destination in Greece	2%
New Orleans	2%
New York City	2%

Base: All LGBT USA or Canada Residents, Married in Past Year or Engaged (Provided a Valid Destination) n=262 (71% of respondents engaged or married in the past year provided honeymoon destinations. Both United States and Canadian residents were reported for this question to achieve a higher response rate.)

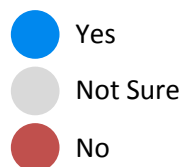
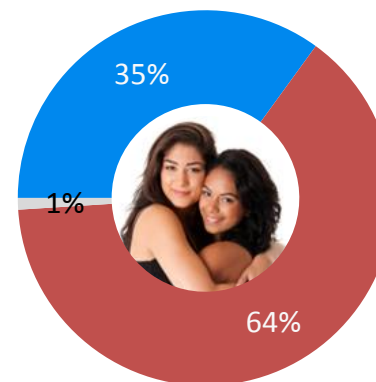
**Visiting LGBT Friends:** Destinations like Fort Lauderdale and Palm Springs, known for their high proportion of LGBT residents, have always been known to attract “visiting LGBT friends travel.” CMI tested the concept nationally and found that 40% of gay and bisexual men and 35% of lesbians and bisexual women had taken an overnight vacation trip primarily to visit an LGBT friend in the past 12 months. When they do, just under half exclusively stay at the LGBT friend’s house, while the other half spend at least some time in paid accommodations. The impact of LGBT friend visitation can be substantial for hotels, restaurants and attractions in these communities.

In the past 12 months have you taken an overnight vacation trip primarily to visit an LGBT friend?

*Among Gay and Bisexual Men*



*Among Lesbians and Bisexual Women*



**On the last trip taken to primarily visit an LGBT friend, did you...?**

	<i>*Men</i>	<i>*Women</i>
Stay overnight at LGBT friend's house	44%	51%
Stay overnight in a hotel or paid accommodation	32%	26%
Combination of both	25%	23%

Bases: USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406; USA Gay and Bisexual Men (Visited an LGBT Friend) n=909; USA Lesbians and Bisexual Women (Visited an LGBT Friend) n=494



**Cruises:** 16% of LGBT community members reported having taken any type of cruise in the past year. Of those who took a cruise, most of these cruises were mainstream/general population cruise departures. However, a third of older LGBTs reported taking some type of LGBT group or charter cruise. The percentage significantly drops for Millennials.

Have you taken a cruise in the past 12 months of at least one night at sea?



**16%** of LGBTs took a cruise in the past 12 months.



**18%** of gay and bisexual men took a cruise, compared to 13% of lesbians and bisexual women.

**Types of Cruises Taken in the Past 12 Months**

*Among Cruise Takers Only • Multiple Selections Permitted*

	<b>Millennials</b>	<b>Gen X</b>	<b>Boomers</b>
Mainstream/general population cruise departure	91%	71%	69%
LGBT charter cruise (like Atlantis or Olivia), small LGBT group on a mainstream cruise organized by a travel agent or small LGBT group on a mainstream cruise organized by friends or family	13%	33%	33%

Bases: All USA LGBTs n=3,768; USA Gay and Bisexual Men n=2,262; USA Lesbians and Bisexual Women n=1,404

**Work Vacation Days Use:** LGBTs who are employed full-time received a median 20 vacation days per year. Of note, those who receive two weeks of vacation per year tend to take the full amounts. Those who receive more than two weeks are less likely to use their full vacation time allocation.

### Vacation Day Use

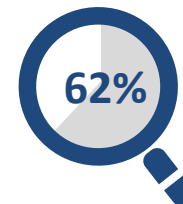
Median # of  
Vacation Days



Median # of Vacation Days Used 15  
(75% of Available)



% Using Maximum  
Provided Days or More



#### Results by Number of Vacation Days Available

	1-7 Days	8-14 Days	15-21 Days	22-30 Days	31+ Days
<b>% of LGBTs Surveyed</b>	7%	24%	39%	21%	8%
% Taking Less Vacation Time than Available	52%	17%	41%	51%	45%
% Taking the Maximum Vacation Time Available or More than Available	48%	83%	59%	49%	55%
<b>Median Days Used</b>	5	10	15	23	35

Bases: USA LGBTs (Employed Full-time and Responded) n=2,016

20<sup>th</sup> Annual Survey on  
**LGBT Tourism & Hospitality**  
U.S. Overview Report December 2015

# HOTELS AND ACCOMMODATIONS



**Type of Hotel Booked:** LGBTs book a wide variety of hotels and accommodations, and often different types within the same year. This graph provides a view of gender distribution across various types of hotels. It is noted that gay men trend higher with more traditional hotels, and lesbians trend higher with “non-hotel” accommodations (although lesbians are still more likely to stay in traditional hotels).






In the past 12 months, in which type of accommodations did you stay?

	<i>Gay and Bisexual Men</i>	<i>Lesbians and Bisexual Women</i>
Large urban / city core brand hotel	54%	47%
A midrange hotel brand	53%	51%
Medium sized hotel in a city	42%	41%
A luxury hotel brand	34%	27%
Boutique or small design oriented hotel	30%	21%
Any hotel located in the suburbs of a city	27%	24%
A budget hotel brand	23%	22%
Small hotel or motel in a city	22%	19%
Medium sized hotel in a resort area	20%	17%
Large hotel in a resort area	19%	16%
Any motel along a highway	17%	16%
Small multi room guest house or B&B in a city	12%	13%
Small B&B in a resort area	10%	10%
Booked an apartment or condo rented by owner	10%	11%
Couch surfed for free	9%	11%
Booked an entire house rented by owner	8%	12%
Stayed overnight in my own vacation home	8%	6%
Camped in a tent	5%	12%
Booked a paid room in someone's house	4%	6%
RV Park	2%	6%
Booked an apartment or unit attached to someone's house	2%	3%
Stayed overnight in my own timeshare	4%	7%

Bases: USA Gay and Bisexual Men n=2,230; USA Lesbians and Bisexual Women n=1,394

**Hotel Selection Rankings:** With nearly every major hotel group actively promoting to the LGBT community, many in the LGBT community now believe that “all major hotel brands are LGBT-friendly.” This has led to a decreased influence of a favorable LGBT reputation being a *primary* reason to book a hotel. Today, location of the hotel and value of price for quality of hotel are the two most motivating factors for hotel selection. LGBT-friendly reputation still ranks higher than hotel’s loyalty program. LGBT-friendly reputation ranks higher for gay and bisexual men compared to lesbians and bisexual women. Millennials rank low price higher than LGBT-friendly reputation.

When you shop for hotels, how would you rank the following motivators in your selection process? Drag over your highest motivator first, then 2nd and then continue.

		<i>Gay and Bisexual Men</i>	<i>Lesbians and Bisexual Women</i>	<i>Millennials</i>	<i>Gen X</i>	<i>Boomers</i>
	Location	1.9	1.9	2.1	1.9	1.8
	Value of Price for Hotel Quality	2.2	2.1	2.1	2.1	2.2
	LGBT-friendly Reputation	2.5	3.5	3.7	3.5	3.3
	Low Price	3.3	3.2	2.7	3.2	3.5
	Hotel Loyalty Program	4.1	4.2	4.5	4.1	4.0

Bases Vary Slightly by Motivator: USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406; USA LGBT Millennials n=774; USA LGBT Gen X n=1,171; USA LGBT Boomers n=1,490

**Actual vs. Preferred Accommodation Booking Methods:** The LGBT community both books and prefers to book directly on a hotel's website over online travel sites. While 17% of LGBTs booked an accommodation on a rental-by-owner or shared economy website (e.g. Airbnb, HomeAway, VRBO), only 6% prefer that method.

*Past 12 Month*  
**Actual Booking Methods Used vs. Preferred Booking Methods**

Actual Booking Method (Multiple)		Preferred Booking Method (Pick One)
63%	Direct on hotel's website or app	43%
46%	Online travel agency booking website or app (e.g., Orbitz, Kayak, Hotels.com)	34%
21%	Telephone directly to hotel	7%
17%	Rental-by-owner or shared economy website (e.g., Airbnb, HomeAway.com, VRBO.com)	6%
10%	A travel agent	3%
8%	Deals website (e.g., Groupon, Living Social)	2%
5%	Credit card rewards website (e.g., Chase Ultimate Rewards, Capital One No Hassle Rewards)	1%

Bases: All LGBT USA ("In the past 12 months, which of the following services did you use to book a hotel or other accommodation?") n=3,772; All LGBT USA ("If you had to pick just one, what is your preferred way of booking hotels?") n=3,752

**Actual vs. Preferred Accommodation Booking Methods by age and gender:** LGBT Millennials prefer to book using online travel agencies over direct hotel bookings, while Baby Boomers prefer direct hotel bookings. Rental-by-owner or shared economy website bookings were stronger among Millennials.

*Past 12 Month*  
**Actual Booking Methods Used vs. Preferred Booking Methods**

Actual Booking				Preferred Booking		
Millennials	Gen X	Boomers		Millennials	Gen X	Boomers
55%	66%	65%	Direct on hotel's website or app	37%	45%	46%
50%	53%	43%	Online travel agency booking website or	42%	38%	29%
23%	18%	16%	Rental-by-owner or shared economy website	10%	6%	6%
16%	18%	26%	Telephone directly to hotel	4%	4%	9%
10%	8%	8%	Deals website (e.g., Groupon, Living Social)	4%	3%	2%
8%	9%	11%	A travel agent	2%	2%	4%
6%	5%	5%	Credit card rewards website	1%	1%	1%



**Gay/Bi Men**

**Booking Differences by Gender**

65%	<b>Actually booked</b> direct on hotel's website or app
46%	<b>Prefer booking</b> direct on hotel's website or app
15%	<b>Actually booked</b> via rental-by-owner or shared economy website (e.g. Airbnb, etc.)
4%	<b>Prefer booking</b> via rental-by-owner or shared economy website (e.g. Airbnb, etc.)

**Lesbians/Bi Women**

60%
40%
21%
9%

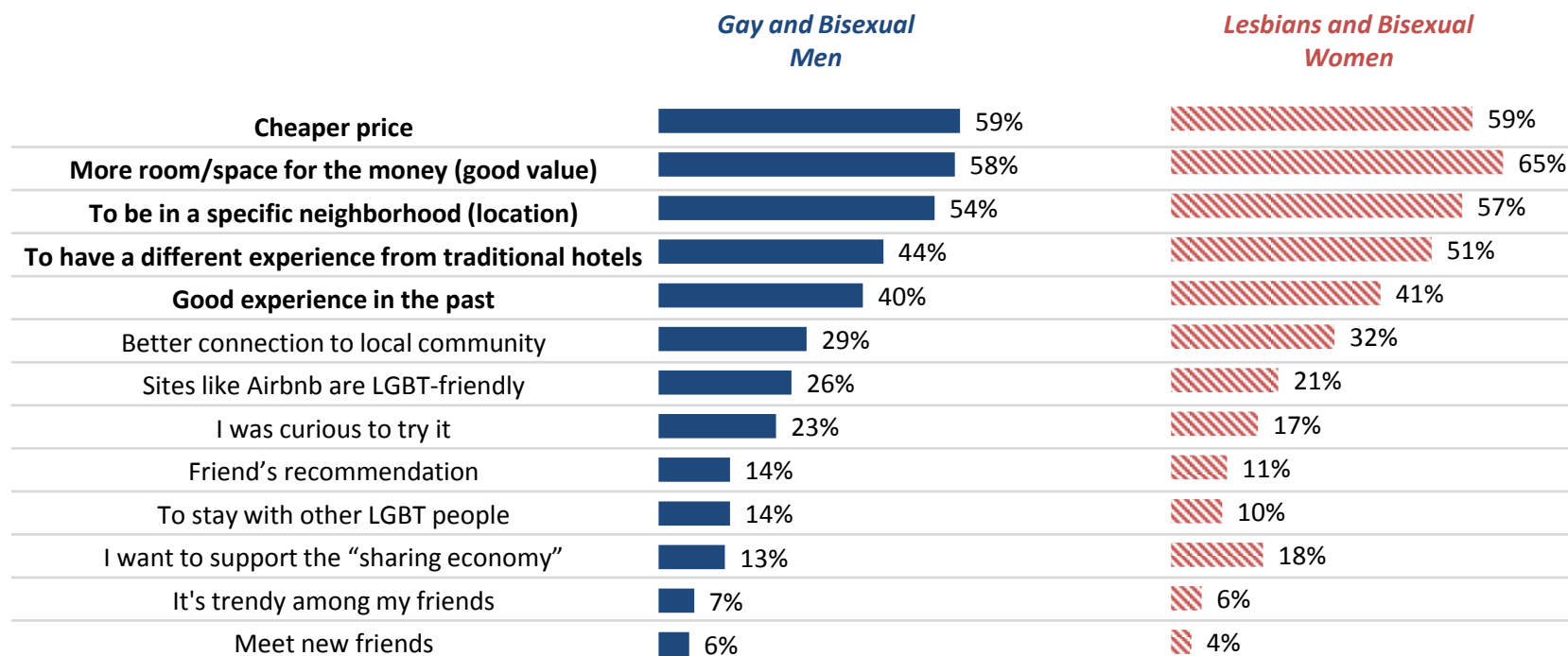


Bases: All LGBT USA ("In the past 12 months, which of the following services did you use to book a hotel or other accommodation?") n=3,772; All LGBT USA ("If you had to pick just one, what is your preferred way of booking hotels?") n=3,752; (Bases Vary Slightly by Question) USA LGBT Millennials n=774; USA LGBT Gen X n=1,171; USA LGBT Boomers n=1,490; USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406

**Reasons to Book Shared Economy Accommodation:** The major reasons LGBTs book a shared economy website were cheaper price, better value, and to be in a specific neighborhood. Of note is that 23% of gay and bisexual men and 17% of lesbians and bisexual women said they tried it in the past 12 months because they were curious.

You said that you have stayed in a “shared economy” or rental by owner accommodation in the past year. Please tell us why you used this service over a traditional hotel.

*Among “Shared Economy” or Rental by Owner Customers*



Bases: USA Gay and Bisexual Men n=333; USA Lesbians and Bisexual Women n=294



**Economic Impact of Shared Economy Accommodation:** Sixty percent of LGBT participants who spent a night in a shared economy accommodation, if unavailable would have just stayed in a hotel/motel in the area instead. However, 40% indicated that the option of a shared economy accommodation encouraged them to either stay at a destination longer or stay in a paid accommodation instead of a family/friend stay. Shared economy websites may create a more positive economic impact for this group (which was about 6% of all LGBT participants in the study).

Please think back to the last time you used a “shared economy” room in the past 12 months. How did the use of an owner accommodation rather than a hotel affect the number of nights you stayed in the destination? (Please mark all that apply.)

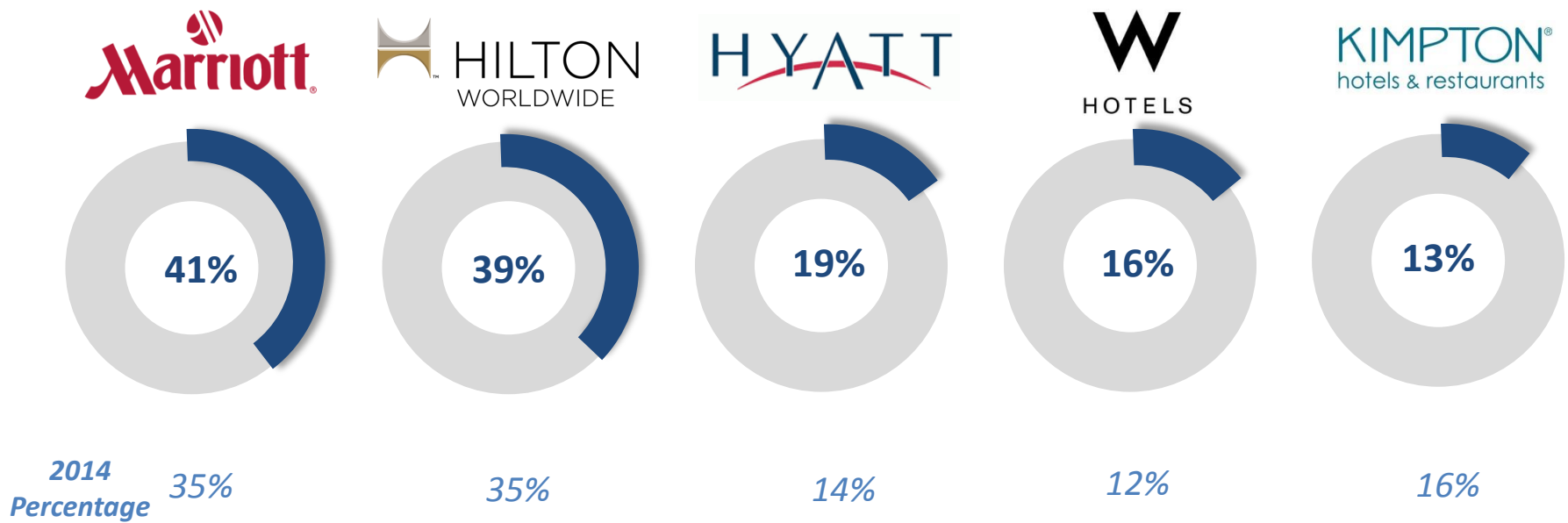
If I had not used a shared economy accommodation, then...



Bases: All USA LGBTs n=633

**Top Ranking Hotels:** With Marriott’s “Love Travels” campaign, the company has risen to the top hotel brand recognized for their LGBT outreach efforts. Of note is that four of the top five brands had better numbers in 2015, compared to 2014. This hotel brand awareness question has been asked in this format in the annual survey since 2009. During that time, Marriott ranked number five in 2009 and has risen to number one through their considerable focus in outreach to the LGBT community.

Of all the hotel brands or chains in the world, which chains/brands have done the best job outreaching to the LGBT community in the past 12 months?  
Please type the name of a hotel brand. (List up to three)



Bases: All USA LGBTs (Provided at Least 1 Valid Hotel Name) n=2,067

20<sup>th</sup> Annual Survey on  
**LGBT Tourism & Hospitality**  
U.S. Overview Report December 2015

# DESTINATIONS



**Destination Websites:** One of the most common questions that tourism bureaus ask CMI is about the value of LGBT microsites on the destination's website. The findings indicate that LGBTs still do value these LGBT-specific microsites, but want to see LGBT imagery included in the destination's general website as well. It's notable that a much higher percentage of lesbians and Millennials did not even know that such LGBT microsites even exist, which may suggest that some of the destination's LGBT marketing may not be reaching these segments.

Some destination/tourism bureaus have "LGBT sections" on their websites.

Do you agree or disagree with these statements?

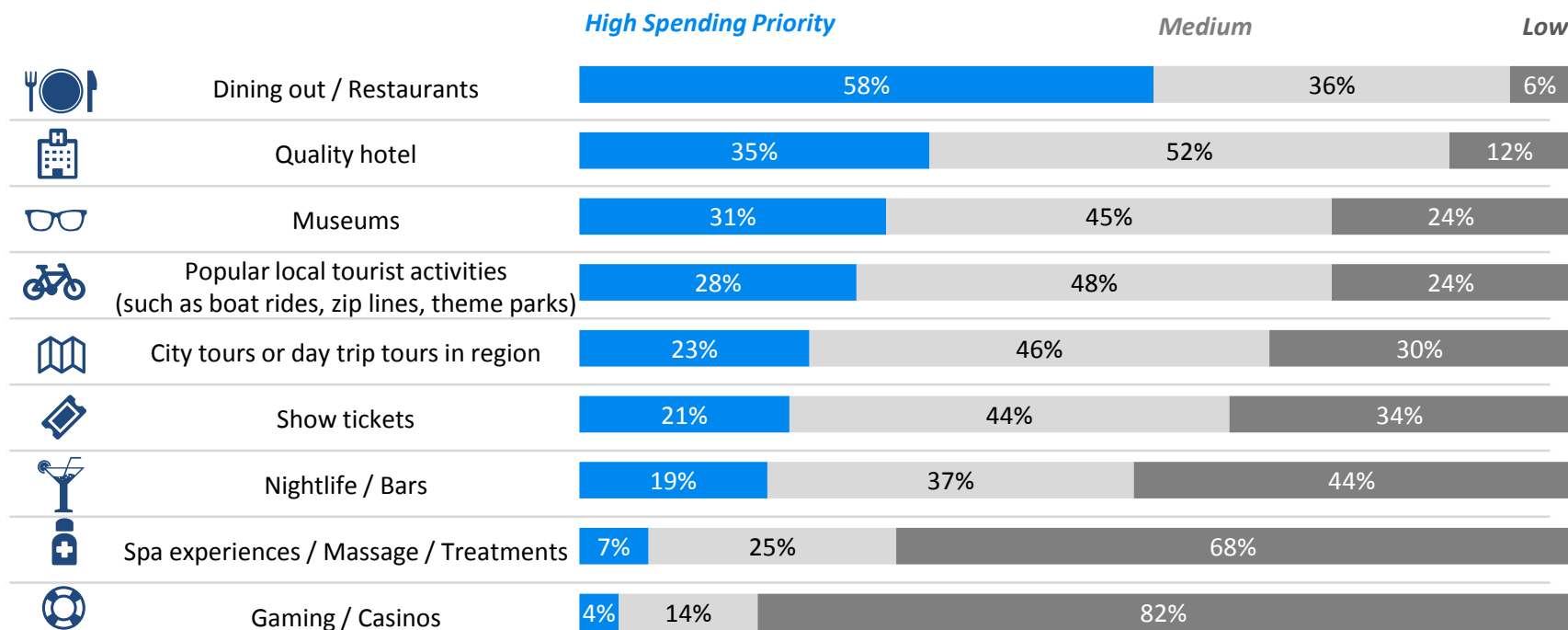
*% in Agreement*

	<i>Gay and Bisexual Men</i>	<i>Lesbians and Bisexual Women</i>	<i>Millennials</i>	<i>Gen X</i>	<i>Boomers</i>
<i>Having an LGBT website makes me feel that the tourism bureau is LGBT-friendly.</i>	89%	91%	89%	89%	91%
<i>A tourism website should do both, have LGBT imagery throughout the site and offer a specific LGBT page of information.</i>	85%	87%	85%	84%	88%
<i>Having an LGBT website makes me more likely to visit a destination.</i>	72%	70%	71%	70%	73%
<i>Including LGBT imagery throughout a website is more important than an LGBT-specific section.</i>	57%	69%	66%	65%	61%
<i>I have viewed a tourism bureau's LGBT page in the past 12 months.</i>	54%	36%	37%	46%	50%
<i>I had no idea that tourism bureaus offer LGBT website pages.</i>	31%	45%	47%	39%	33%
<i>LGBT sections on tourism bureau websites are no longer needed.</i>	11%	9%	11%	11%	8%

Bases Vary Slightly by Statement: USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406; USA LGBT Millennials n=774; USA LGBT Gen X n=1,171; USA LGBT Boomers n=1,490

**LGBT Spending Priorities in Destinations:** When LGBTs travel to a destination, dining out is by far the highest spending priority.

When you travel to a city or destination, what are your spending priorities?  
*Among All USA LGBTs*












Bases Vary Slightly by Spending Priority: USA LGBTs n=3,772

**LGBT Spending Priorities in Destinations by Gender and Generation:** Dining out was the highest priority across genders and generations, especially among Millennials. Men and younger people value spending at bars and nightclubs. Baby Boomer LGBTs are more likely to spend on city tours and day trip tours. Millennials are less likely than Baby Boomers to value quality hotels.

When you travel to a city or destination, what are your spending priorities?

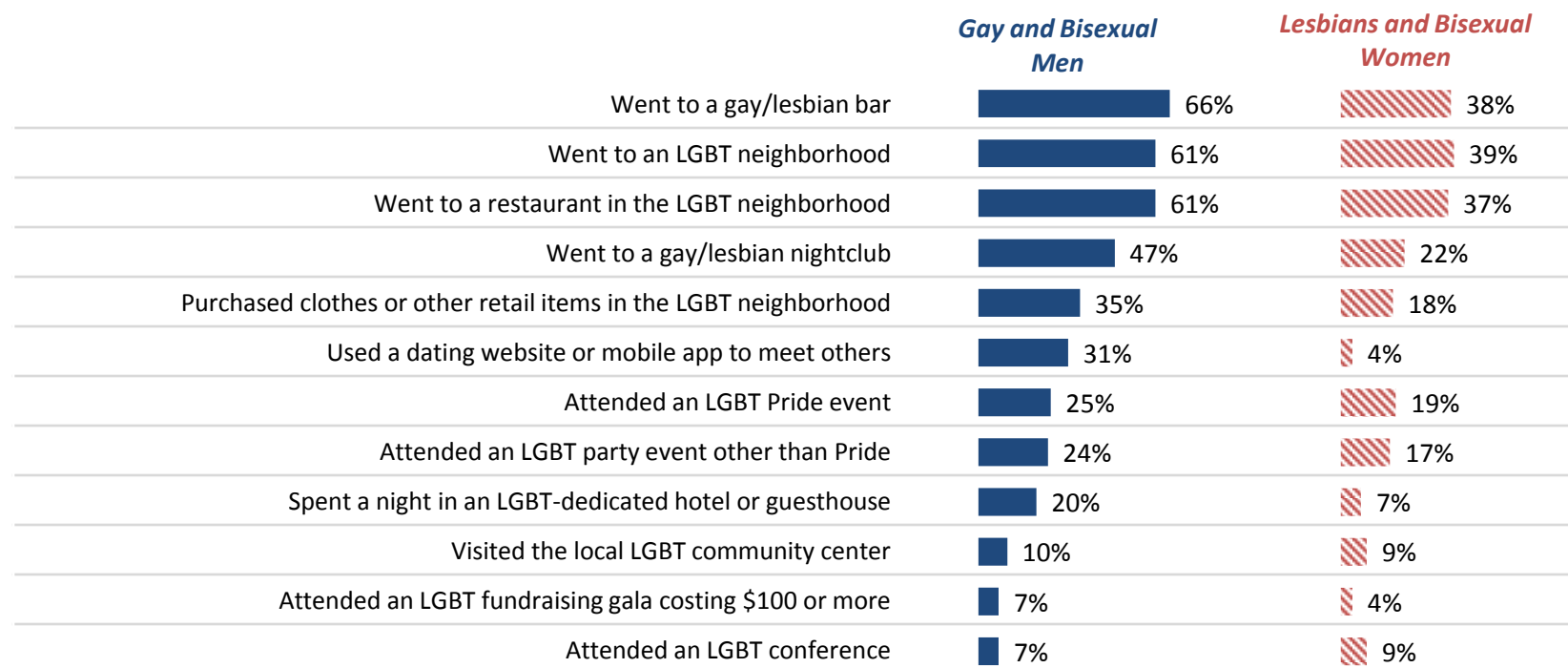
*% High Spending Priority*

		<i>Gay and Bisexual Men</i>	<i>Lesbians and Bisexual Women</i>	<i>Millennials</i>	<i>Gen X</i>	<i>Boomers</i>
	Dining out / Restaurants	58%	58%	64%	59%	56%
	Quality hotel	37%	33%	30%	37%	38%
	Museums	29%	33%	29%	25%	35%
	Popular local tourist activities (such as boat rides, zip lines, theme parks)	27%	28%	29%	32%	26%
	Nightlife / Bars	25%	10%	29%	20%	11%
	Show tickets	23%	19%	18%	20%	22%
	City tours or day trip tours in region	23%	24%	18%	22%	28%
	Spa experiences / Massage / Treatments	7%	7%	5%	9%	7%
	Gaming / Casinos	5%	4%	3%	4%	5%

Bases Vary Slightly by Spending Priority: USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406; USA LGBT Millennials n=774; USA LGBT Gen X n=1,171; USA LGBT Boomers n=1,490

**LGBT Activities While on Vacation by Gender:** The results indicate that LGBT-specific activities in a destination while on vacation are still quite important, especially for gay and bisexual men. Going to the LGBT neighborhood, having dinner in the LGBT neighborhood and going to a gay bar were important.

In the past 12 months, have you participated in any of these LGBT-specific activities while on vacation in a different city than you live? Please mark all that apply.  
When on vacation in a different city, I have...



Bases: USA Gay and Bisexual Men n=2,229; USA Lesbians and Bisexual Women n=1,362

**LGBT Activities While on Vacation by Generation:** The results indicate that LGBT-specific activities in a destination while on vacation are more popular for Millennials than Baby Boomers, especially going to LGBT neighborhoods and LGBT nightlife. Attending an LGBT Pride event while on vacation was especially popular for Millennials, compared to Baby Boomers.

In the past 12 months, have you participated in any of these LGBT-specific activities while on vacation in a different city than you live? Please mark all that apply.

When on vacation in a different city, I have...

	<i>Millennials</i>	<i>Gen X</i>	<i>Boomers</i>
Went to a gay/lesbian bar	60%	56%	46%
Went to an LGBT neighborhood	56%	53%	46%
Went to a restaurant in the LGBT neighborhood	49%	51%	48%
Went to a gay/lesbian nightclub	48%	39%	28%
Attended an LGBT Pride event	31%	22%	19%
Used a dating website or mobile app to meet others while on vacation	29%	20%	13%
Attended an LGBT party event other than Pride	28%	19%	18%
Purchased clothes or other retail items in the LGBT neighborhood	22%	30%	28%
Attended an LGBT conference	10%	8%	8%
Visited the local LGBT community center	8%	8%	11%
Spent a night in an LGBT-dedicated hotel or guesthouse	8%	14%	16%
Attended an LGBT fundraising gala costing \$100 or more	4%	6%	7%

Bases: USA LGBT Millennials n=774; USA LGBT Gen X n=1,171; USA LGBT Boomers n=1,490



## Top U.S. Destinations | Leisure | Gay & Bisexual Men | 2015

Please tell us if you have visited these places in the past 12 months for leisure or business travel reasons AND spent a night in a hotel or paid accommodation.

### *Among Gay and Bisexual Men in the United States*

Rank	Destination	% Visited
1	New York City	25%
2	Las Vegas	17-19%
2	Los Angeles Metro Area	17-19%
2	San Francisco	17-19%
5	Chicago	14-16%
5	Ft. Lauderdale/Wilton Manors	14-16%
5	Palm Springs	14-16%
5	Washington, DC	14-16%
9	Miami/ South Beach	11-12%
9	Orlando	11-12%
9	San Diego	11-12%

Rank	Destination	% Visited
12	Boston, Key West, Florida Keys, Philadelphia, New Orleans, Seattle	9%

Rank	Destination	% Visited
Rest of Top 20	Austin, Baltimore, Dallas, Denver, Hawaii, Houston, Napa County, Portland, Provincetown, Sonoma County, Tampa/St. Petersburg	7% -8%
Rest of Top 20	Atlanta, Nashville, Rehoboth Beach, San Antonio, Phoenix	5% - 6%

Base: USA Gay and Bisexual Men n=2,250

Grouping by percentage: CMI groups by percentage because the margin of error is near 3%. CMI feels this method stabilizes the ranking for year-to-year comparisons within the margin of error.

## Top U.S. Destinations | Leisure | Lesbians and Bisexual Women | 2015

Please tell us if you have visited these places in the past 12 months for leisure or business travel reasons  
AND spent a night in a hotel or paid accommodation.

### *Among Lesbians and Bisexual Women in the United States*

Rank	Destination	% Visited
1	New York City	17%
1	San Francisco	17%
3	Los Angeles Metro Area	14%
4	Chicago	11-13%
4	Las Vegas	11-13%
4	Washington, DC	11-13%
4	Boston	11-13%
4	Orlando	11-13%
9	New Orleans	8-9%
9	San Diego	8-9%
9	Seattle	8-9%

Rank	Destination	% Visited
Rest of Top 20	Baltimore, Denver, Hawaii, Napa County, Palm Springs, Phoenix, Portland, Sonoma County, Tampa/St. Petersburg	7%
Rest of Top 20	Atlanta, Dallas, Key West / Florida Keys, Fort Lauderdale, Miami/ South Beach, Nashville, Philadelphia, Provincetown	5-6%

Base: USA Lesbian and Bisexual Women=1,401

Grouping by percentage: CMI groups by percentage because the margin of error is near 3%. CMI feels this method stabilizes the ranking for year-to-year comparisons within the margin of error.

## Top U.S. Destinations | Business | U.S. LGBT | 2015

Rank	Destination	% Visited
1 <sup>st</sup> Tier	Chicago, New York City, Washington, DC	7+%
2 <sup>nd</sup> Tier	Atlanta, Dallas, Las Vegas, Los Angeles, San Francisco	5-6%
3 <sup>rd</sup> Tier	Atlanta, Austin, Boston, Denver, Houston, New Orleans, Orlando, Philadelphia, Portland, Phoenix, Seattle	3-4%

Base: USA LGBTs n=3,772

Grouping by percentage: CMI groups by percentage because the margin of error is near 3%. CMI feels this method stabilizes the ranking for year-to-year comparisons within the margin of error.

## Top International Destinations | U.S. LGBT | 2015

Destination	% Visited
England	7%
France	6%
Germany	5%
Italy	5%
Spain	4%
Netherlands	3%

Destination	% Visited
Toronto, Canada	6%
Montreal, Canada	5%
Vancouver, Canada	5%

Destination	% Visited
Puerto Vallarta, Mexico	6%
Any Caribbean Island (non-cruise)	5%
Cancun, Mexico	4%

Base: USA LGBTs n=3,772

## *New for 2015*

# Major Metro USA + Canada Destination LGBT “Power Rankings”

The LGBT Power Ranking calculates if a person visited a destination at least one time for leisure or business in the past year, then weights the results by gender and generation, then further weights USA and Canadian travelers.

Rank	Destination
1	New York City
2	San Francisco
3	Los Angeles
4	Chicago
5	Las Vegas
5	Washington, DC
7	Boston
7	Orlando
9	San Diego
10	Fort Lauderdale

Rank	Destination
10	Seattle
12	Philadelphia
13	Atlanta
13	Dallas
15	Miami
15	New Orleans
15	Palm Springs
18	Denver
18	Portland
20	Toronto

Rank	Destination
21	Baltimore
21	Phoenix
21	Tampa/St. Pete
24	Austin
24	Hawaii
24	Houston
27	Vancouver
28	Nashville
28	Montreal
30	San Antonio

Base: USA and Canadian LGBTs n=4,656

20<sup>th</sup> Annual Survey on  
**LGBT Tourism & Hospitality**  
U.S. Overview Report December 2015

# LGBT FAMILY TRAVEL

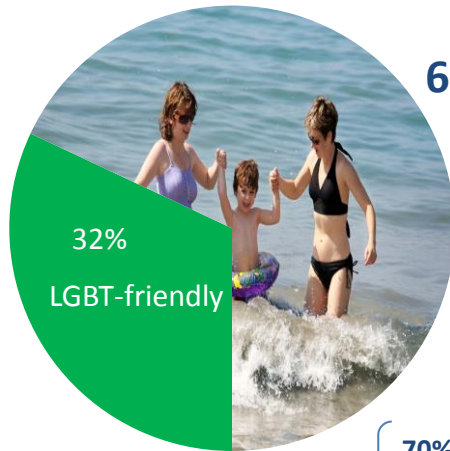


**LGBT Families:** This question was asked for the third year in order to track trends. As in past years, when traveling with children, the majority of LGBT parents are motivated by child-friendly destinations and child-friendly hotels, over LGBT-friendly destinations and hotels. Of note is that over the three year time period, LGBT parents have become even more dedicated to choosing child-friendly options. LGBT-friendly preference dropped 10% for destinations and 5% for hotels over the three year period.

If you had to pick one...

When traveling with your children, what is more important to you and your family, when you are...?  
*Among Parents of Children Under 18*

**CHOOSING A  
 VACATION DESTINATION**



**CHOOSING A  
 HOTEL**

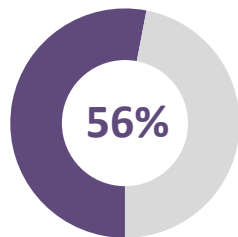


**70% of lesbian and bi female parents chose child-friendly, compared to 63% of gay and bisexual male parents for destination consideration.**

Bases: USA LGBT Parents of Children Under 18 n=291; USA Gay and Bisexual Male Parents of Children Under 18 n=75; USA Lesbians and Bisexual Female Parents of Children Under 18 n=204

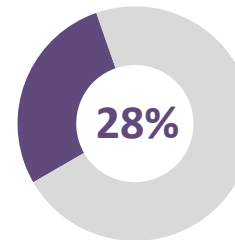
**LGBT Grandparents:** Long overlooked, LGBTs are grandparents who travel with grandchildren. [2015 CMI LGBT Community Survey](#) respondents who have children over age 18 included 32% of LGBT Baby Boomer lesbian and bisexual women, 17% of Baby Boomer gay and bisexual men, and 18% of transgender community members. In this report, 56% of parents of children over age 18 were also grandparents, and 28% went on a vacation with their grandchildren in the past year. Multigenerational travel is a hot topic in the travel industry right now, and the LGBT community should be included in that discussion.

You said you have children over age 18. Are you also a grandparent?

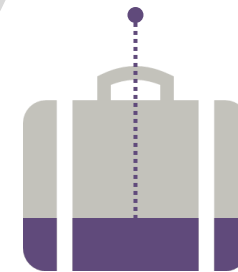


56% of parents of children over age 18 are also **grandparents**.

59% of gay and bisexual men with children over age 18 are grandparents compared to 53% of lesbian and bisexual female parents of 18+ children.



28% **Went on a vacation** with their grandchildren.

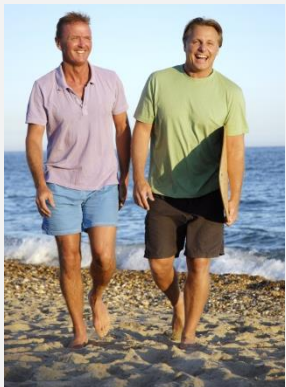


Bases: USA LGBT Parents of Children Over 18 n=482; USA Gay and Bisexual Male Parents of Children Under 18 n=228; USA Lesbians and Bisexual Female Parents of Children Under 18 n=239; USA LGBT Grandparents n=265



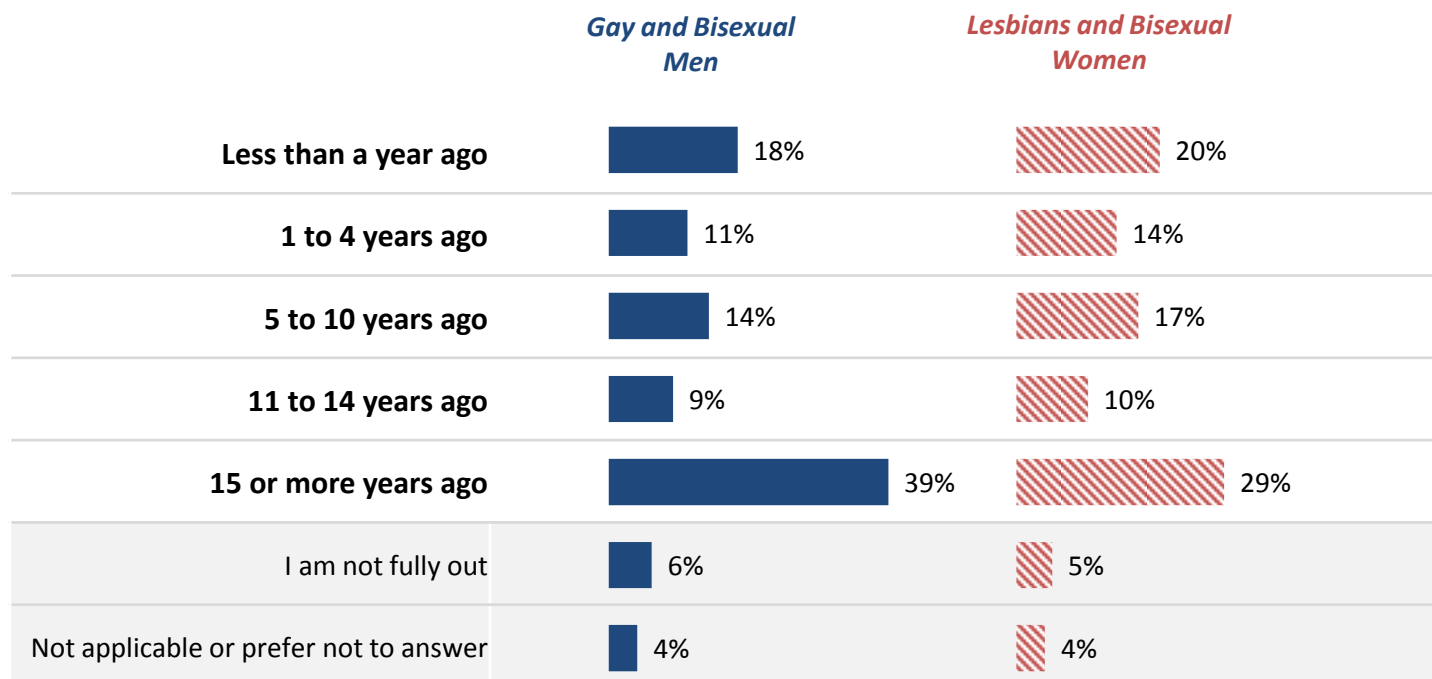
20<sup>th</sup> Annual Survey on  
**LGBT Tourism & Hospitality**  
U.S. Overview Report December 2015

# THE EVOLUTION OF LGBT TRAVEL



**Being Out as an LGBT Traveler:** A high percentage of LGBT community members have been traveling as fully out LGBT travelers for 15 years or more. This is of interest as new marketing initiatives should recognize that the “mind-set” of a long-term fully out LGBT traveler may be different than a young LGBT person. We asked this question primarily to better understand what has changed in the LGBT travel industry over the past 15 years. See next slide.

How long has it been since you went on your first vacation as a fully out LGBT traveler?



Bases: USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406



You said you have been traveling as an out LGBT person for 15 years or more.

Please tell what has changed over the past 15+ years when it comes to LGBT travel.

“On our last trip to NYC, my wife and I celebrated our 25th anniversary. It was easy - and so nice - to feel able to share this with the hotel staff. There was a surprise bottle of champagne and balloons in our room. I never could have imagined it 25 years ago!”

“When I was first traveling as an out gay man, there was still a sense of 'hiding' during the actual travel itself. Maybe not hiding, but certainly being cautious about my surroundings. Today, I feel completely comfortable traveling with my husband and notice many other LGBT travelers and their families along the way.”

“The phenomenal commitment to LGBTQ issues by major business, especially those in the travel and hospitality industry, have become undeniable in the past 20 years. Tourism is not scared to show their compassion and support for not only their employees who are LGBTQ but for their guests as well.”

“Everything is more accepted, which makes you feel a lot safer!”

“The travel industry has been one of the first pioneers for LGBT inclusiveness at a time when it was not popular or as ‘acceptable’ to do so!”

“As we travel with our daughter we assume we will be treated with respect and be welcomed everywhere we go. This is drastically different from 20 years ago, we would have had our guard up and would be ready for challenges. It means vacations are vacations for our family a time to relax and enjoy each other and the communities we visit.”

“So much has changed in terms of acceptance over the past two decades. I used to be nervous.”

“People have stopped asking if we're brothers and when asked if we're married, we say “yes” and they seem excited about it.”

“WE ARE FREE TO BE WHO WE ARE NOW!!!”

“It seems the world has opened up, and that it is no longer necessary to only go to typical gay destinations. I have enjoyed seeing gay people represented in mainstream ads. I see ad imagery moving away from the old fashioned cliché gay image. I'm glad to see more ads featuring couples, and guys of various ages. This to me represents progress.”

“EVERYTHING has changed...and changed for the better!!!”

“Traveling has become such a more welcoming experience over the past 20 years. The hospitality industry has made giant strides in making LGBT travelers feel appreciated as valued customers.”

20<sup>th</sup> Annual Survey on  
**LGBT Tourism & Hospitality**  
U.S. Overview Report December 2015

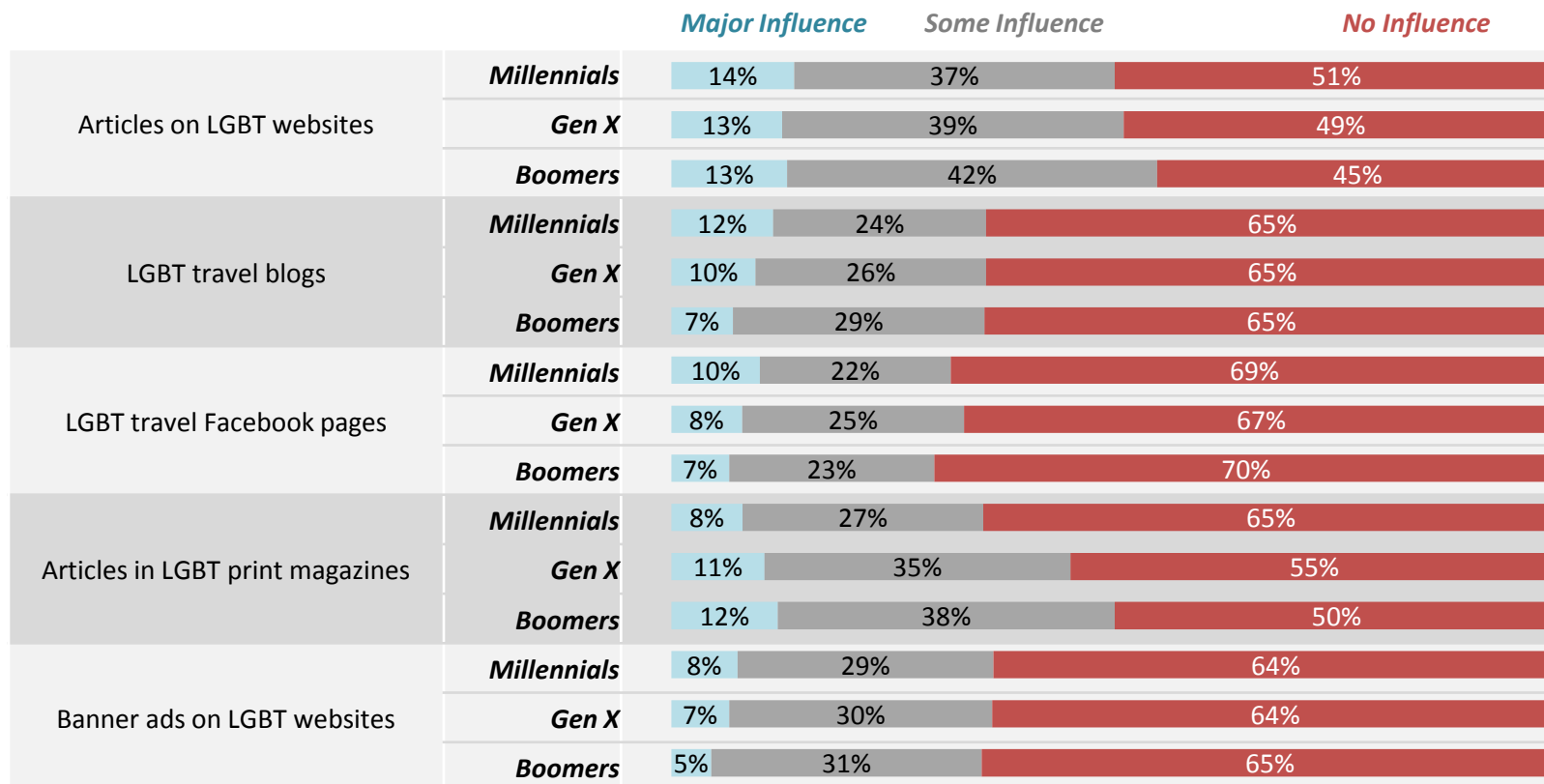
# LGBT OUTREACH



## Within the LGBT media, what has influenced you over the past 12 months when making your vacation destination selections?

*Among Generations*

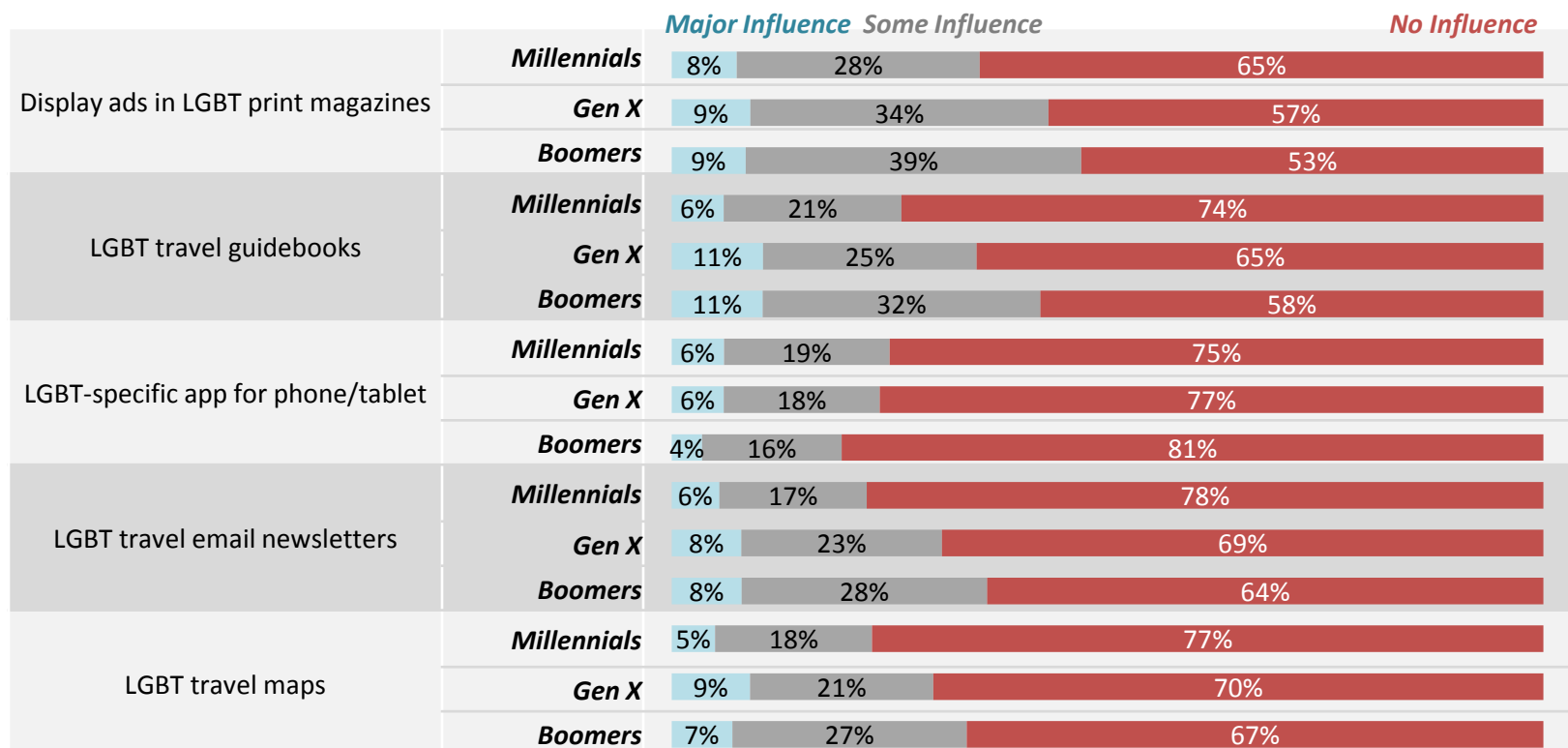
Slide 1 of 2



Bases Vary Slightly by Media Type: USA LGBT Millennials n=774; USA LGBT Gen X n=1,171; USA LGBT Boomers n=1,490

## Within the LGBT media, what has influenced you over the past 12 months when making your vacation destination selections?

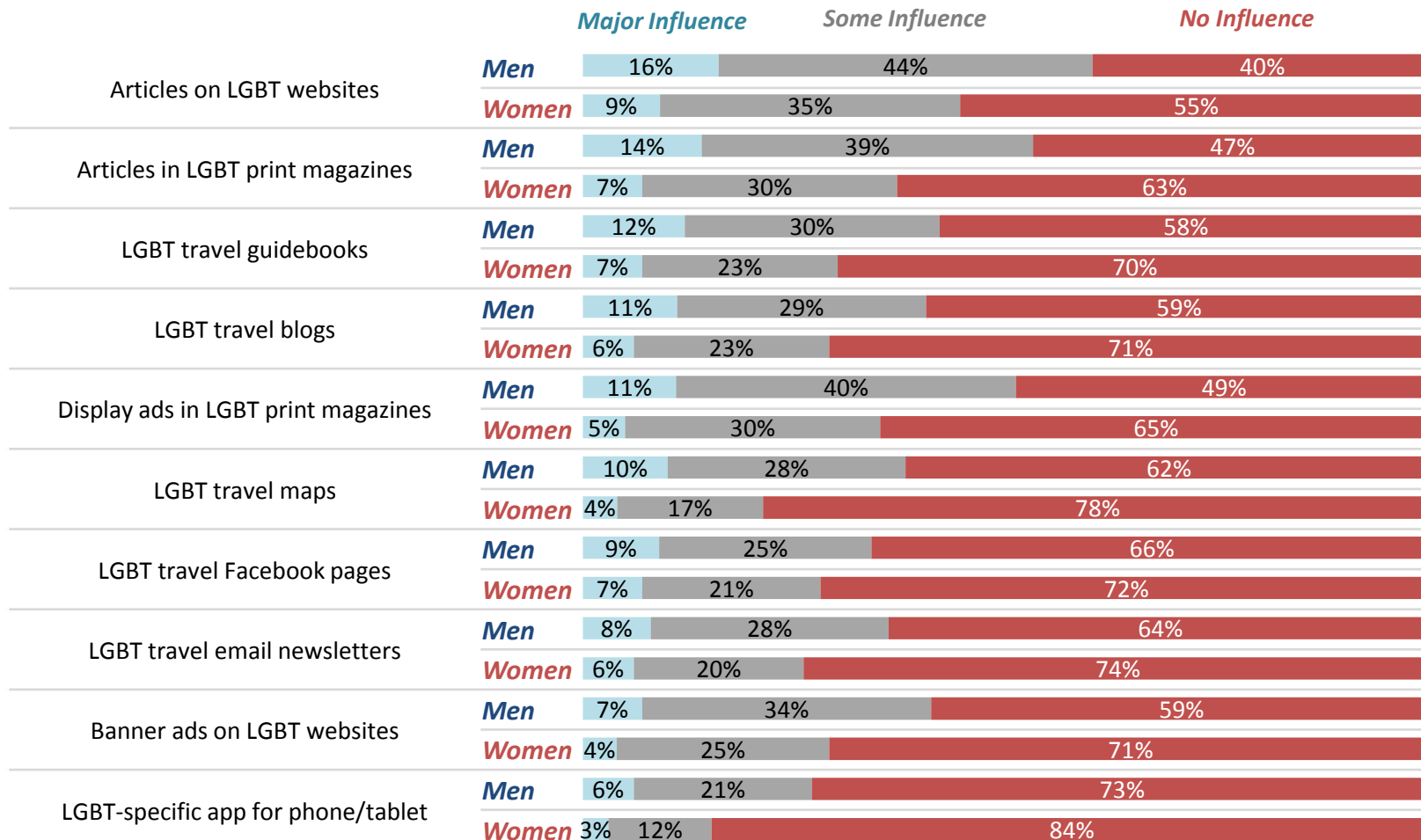
*Among Generations*  
*Slide 2 of 2*



Bases Vary Slightly by Media Type: USA LGBT Millennials n=774; USA LGBT Gen X n=1,171; USA LGBT Boomers n=1,490

### Within the LGBT media, what has influenced you over the past 12 months when making your vacation destination selections?

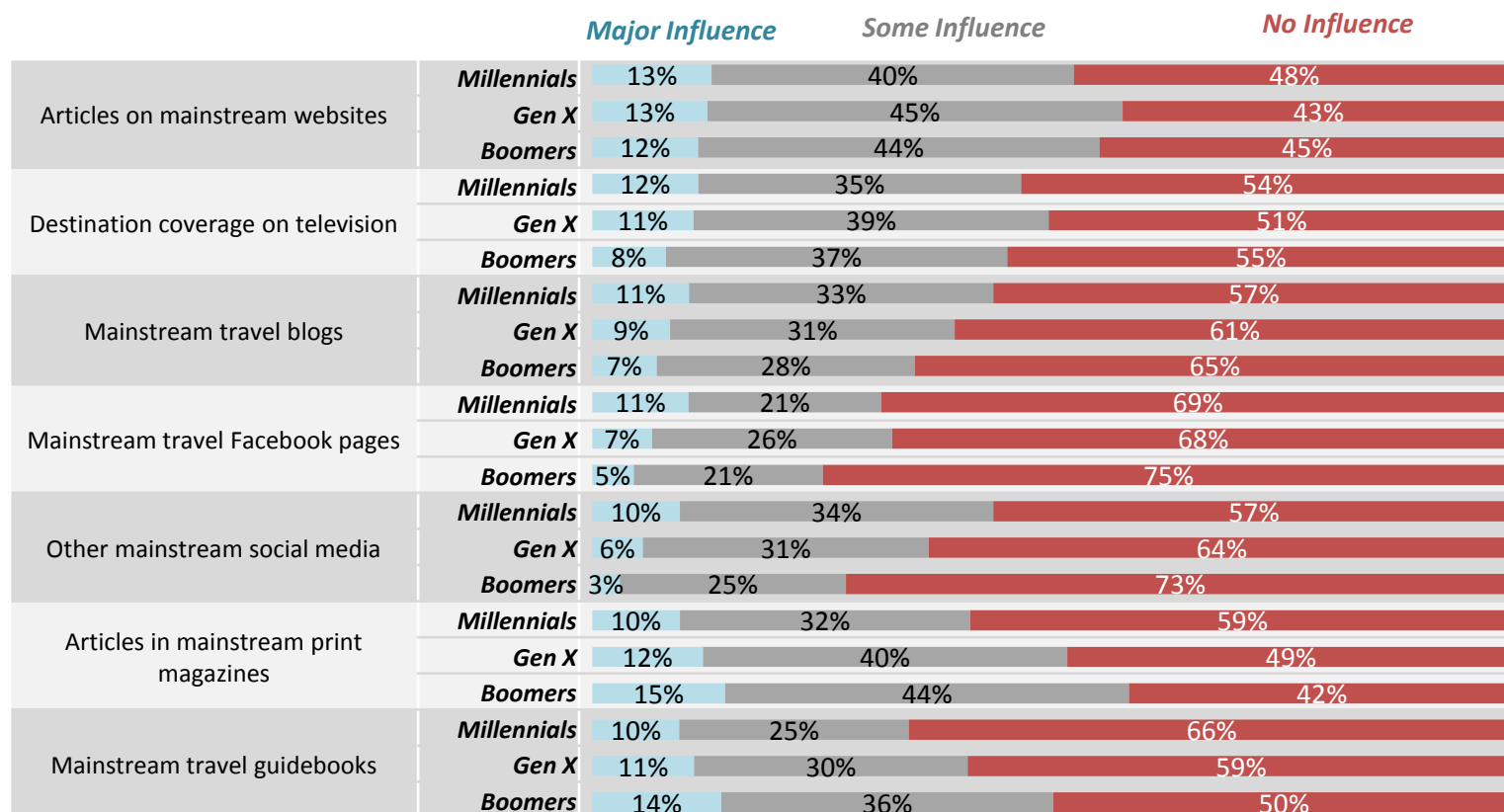
*Among Gay and Bisexual Men and Lesbians and Bisexual Women*



Bases Vary Slightly by Media Type: USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406

## Within the mainstream or general media, what has influenced you over the past 12 months when making your vacation destination selections?

*Among Generations*  
*Slide 1 of 2*

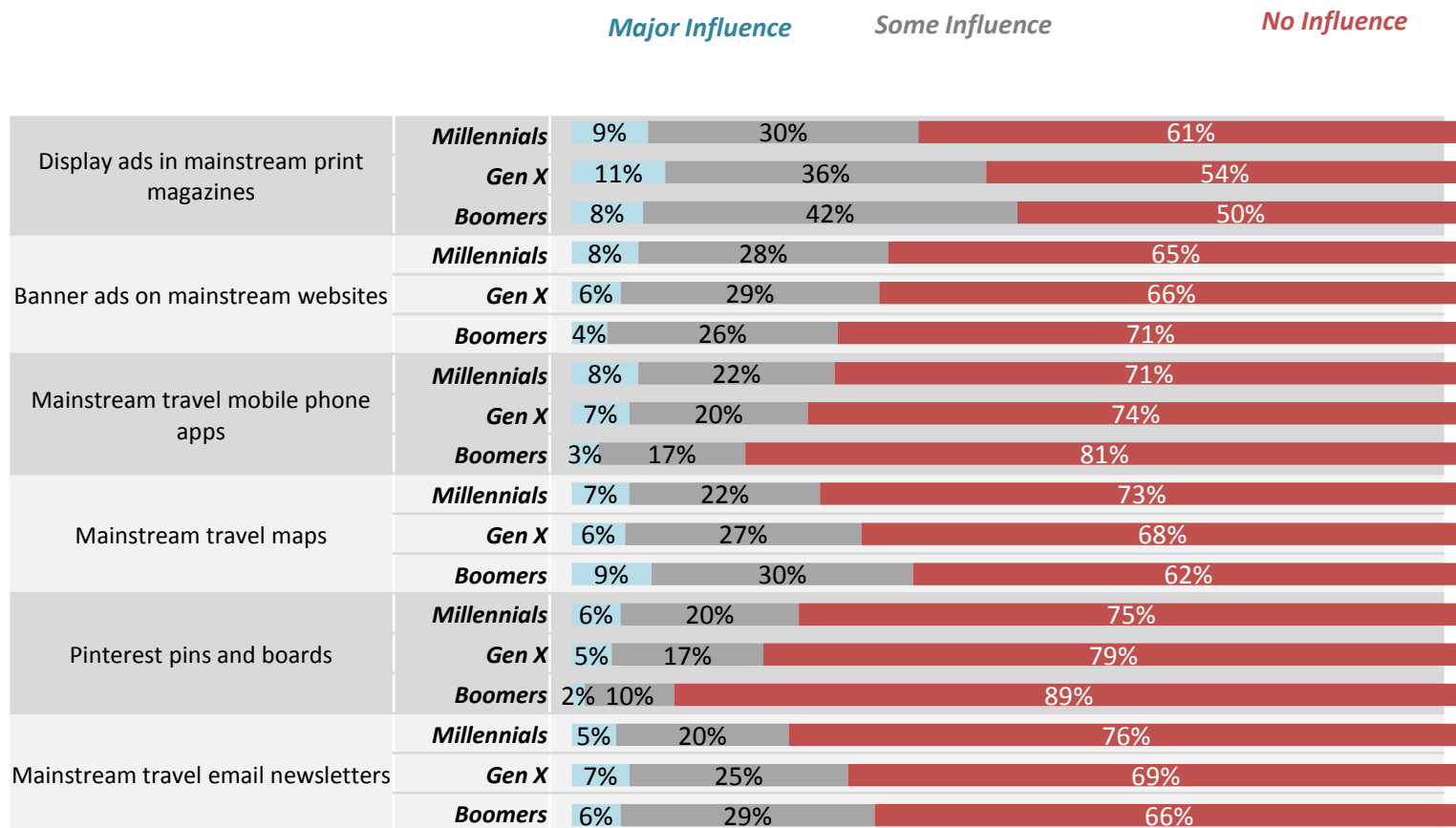


Bases Vary Slightly by Media Type: USA LGBT Millennials n=774; USA LGBT Gen X n=1,171; USA LGBT Boomers n=1,490



### Within the mainstream or general media, what has influenced you over the past 12 months when making your vacation destination selections?

*Among Generations  
Slide 2 of 2*

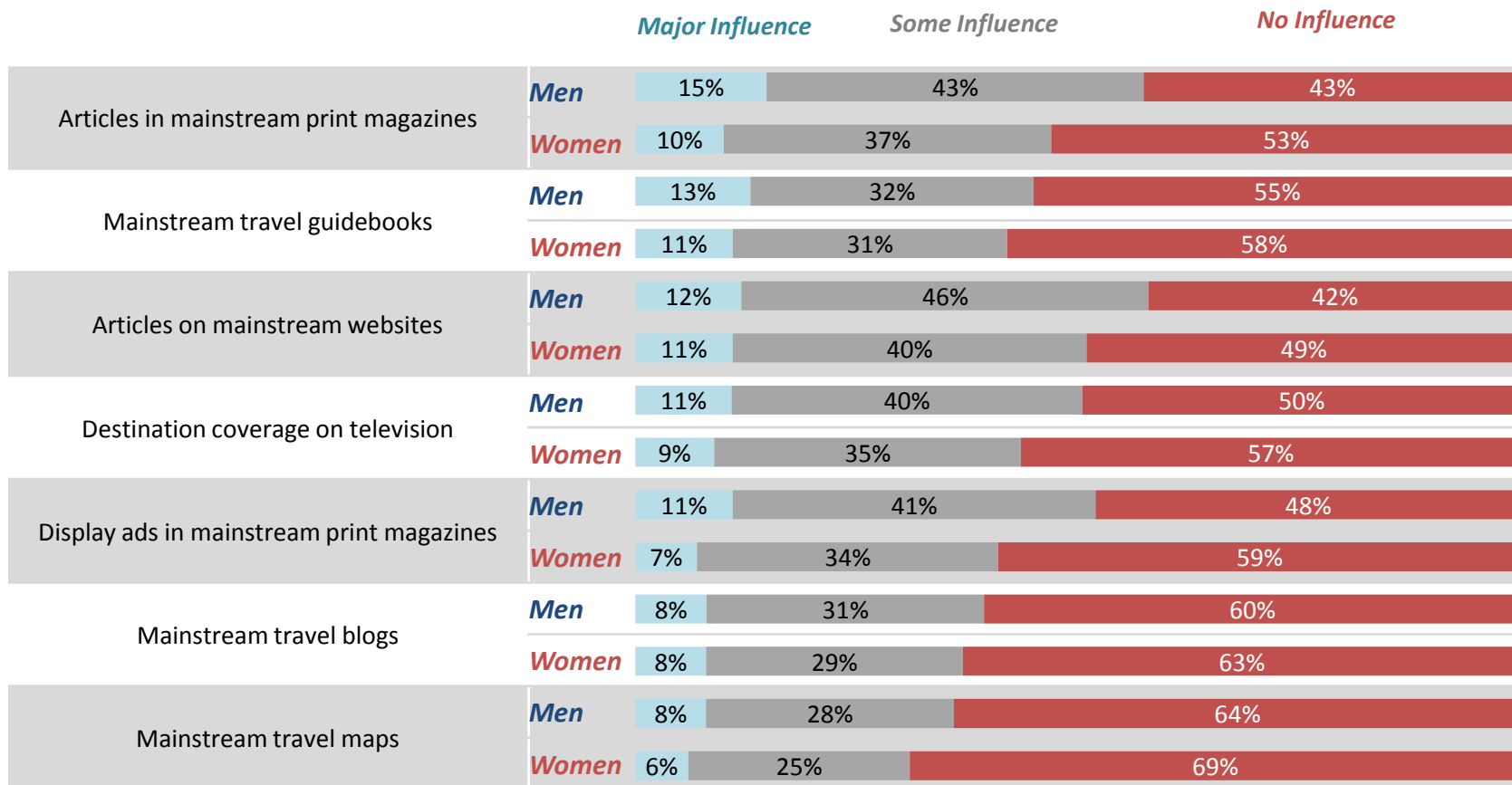


Bases Vary Slightly by Media Type: USA LGBT Millennials n=774; USA LGBT Gen X n=1,171; USA LGBT Boomers n=1,490

**Within the mainstream or general media, what has influenced you over the past 12 months when making your vacation destination selections?**

*Among Gay and Bisexual Men and Lesbians and Bisexual Women*

*Slide 1 of 2*

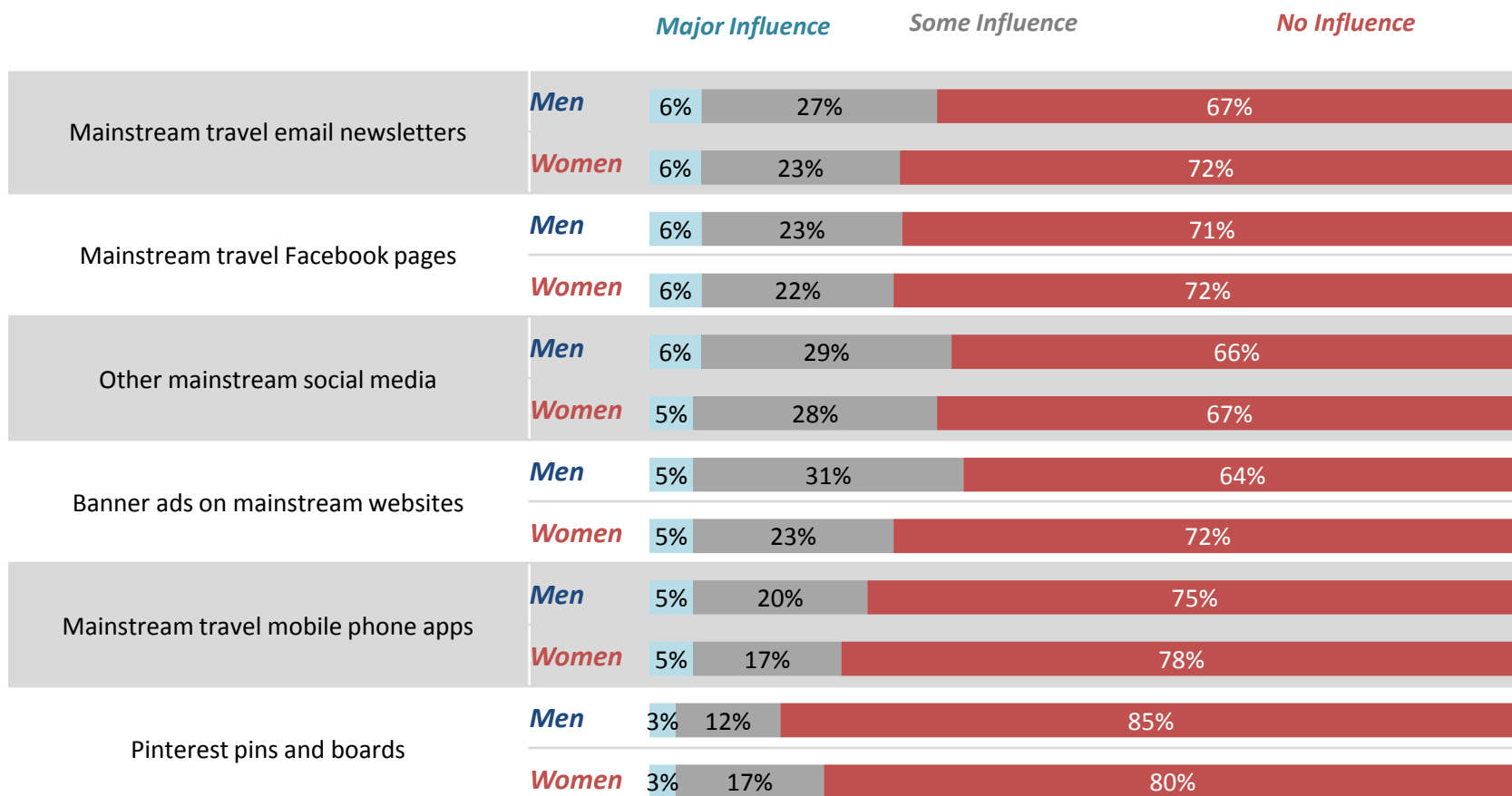


Bases Vary Slightly by Media Type: USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406

### Within the mainstream or general media, what has influenced you over the past 12 months when making your vacation destination selections?

*Among Gay and Bisexual Men and Lesbians and Bisexual Women*

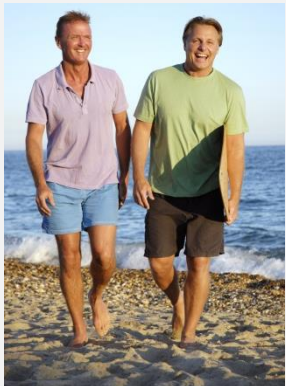
*Slide 2 of 2*



Bases Vary Slightly by Media Type: USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406

20<sup>th</sup> Annual Survey on  
**LGBT Tourism & Hospitality**  
U.S. Overview Report December 2015

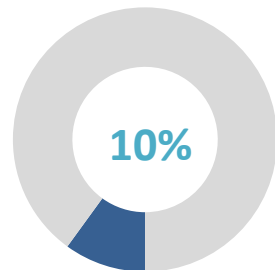
# APPENDIX



**Community-Specific Events:** LGBT segment cultural, sporting and professional events are big business. 10% of gay and bisexual men reported attending a Bear community event the past year. 19% of lesbians and bisexual women reported attending a lesbian/bi women's event in the past year. 26% of transgender community members reported attending a transgender event in the past year.

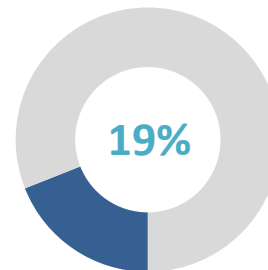
### Event Travel/Attendance in Past 12 Months

#### BEAR EVENT



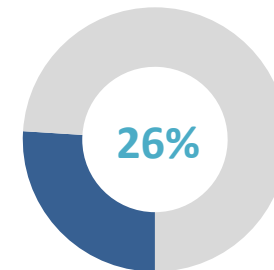
of **gay and bi men** have attended a bear event.

#### LESBIAN/BI WOMEN'S EVENT



of **lesbian/bi women** have attended a lesbian/bi women's event.

#### TRANSGENDER COMMUNITY EVENT

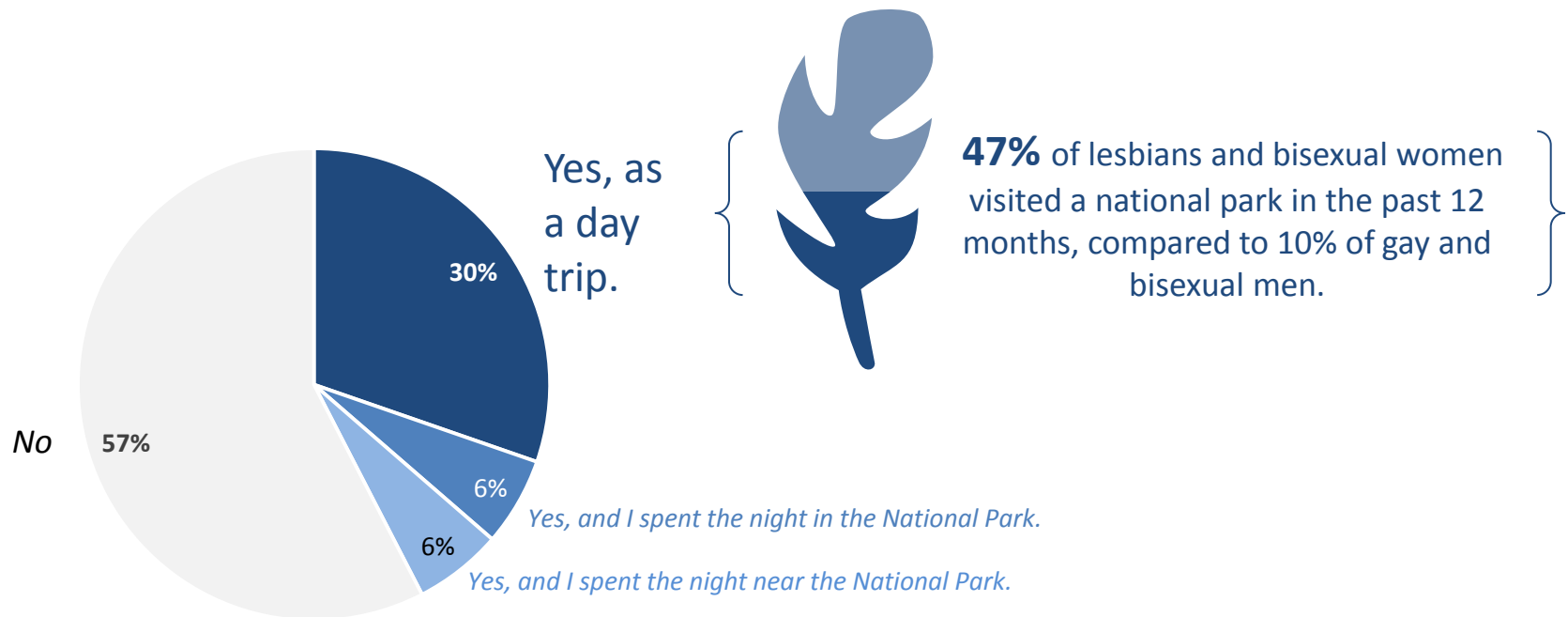


of **trans individuals** have attended a trans event.

Bases: USA Gay and Bisexual Men n=2,251; USA Lesbians and Bisexual Women n=1,401; USA Transgender Respondents n=132

**USA National Parks:** 47% of lesbians and bisexual women and 40% gay and bisexual men visited a national park in the past 12 months.









In the past 12 months, did you visit any United States National Park?



Bases: All USA LGBTs n=3,760; USA Gay and Bisexual Men n=2,253; USA Lesbians and Bisexual Women n=1,405

**Transportation at Destinations:** While in a destination, Millennials are far more likely to use public transportation and Uber than Baby Boomers. Baby Boomers are more likely to rent cars. Traditional taxi use was fairly even across all generations.

During your most recent vacation in the USA, did you.....?  
Please mark all that apply.

		<i>Millennials</i>	<i>Gen X</i>	<i>Boomers</i>
	Use a subway or light rail train	45%	37%	36%
	Use Uber or Lyft	44%	29%	16%
	Take a taxi	36%	37%	34%
	Rent a car	31%	41%	42%
	Use a public bus	28%	19%	20%
	Use a public airport shuttle	26%	24%	27%
	Rent a bicycle	6%	7%	5%
	Hire a limousine	2%	4%	6%

Bases Vary by Generation

CMI's highly specialized services are based on 20+ years of dedicated experience, producing LGBT (lesbian, gay, bisexual, transgender) market intelligence for leading corporate clients and organizations across the country and around the world.

Serving a variety of industries, we leverage our in-house proprietary panel of more than 70,000 community-representative LGBT consumers to produce consumer survey studies, recruit and facilitate focus groups, interviews, etc. Additionally, our team of experts offers strategic consulting and marketing planning based on consumer insight, and we produce custom LGBT research/sales/marketing/best practices corporate training and conference presentations.

Diversity procurement: Community Marketing, Inc. is an NGLCC-Certified LGBT Owned Business Enterprise.

## For more information:

Let us help you better understand your opportunities, grow your LGBT market share, and improve return on investment.



### Community Marketing & Insights

584 Castro St. #834

San Francisco, CA 94114 USA

Tel +1 415/437-3800 • Fax +1 415/552-5104

[info@CommunityMarketingInc.com](mailto:info@CommunityMarketingInc.com)

Visit [www.communitymarketinginc.com](http://www.communitymarketinginc.com)





# ABOUT CMI'S LGBT RESEARCH PRACTICE

Founded in 1992, Community Marketing & Insights (CMI) is a full-service market research firm, focused on LGBT insights and analytics.

Market research studies and resulting insights and action items are meant to help marketers understand the LGBT communities, and influence sales, marketing and outreach decisions. However, not all research is the same. Community Marketing & Insights' (CMI) methodologies and experience are distinct from other research companies when considering approaches, survey respondent sources—and ultimately—the validity and utility of sought-after results.

Community Marketing & Insights (CMI) has been conducting LGBT consumer research for over 20 years. Our practice includes online surveys, in-depth interviews, intercepts, focus groups (on-site and online), and advisory boards in North America, Europe and Asia. Industry leaders around the world depend on CMI's research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, product development, measurable marketing planning and assessment of return on investment.

CMI's research findings have been published in the New York Times, Wall Street Journal, Forbes, Washington Post, Chicago Tribune, Los Angeles Times, USA Today, Chicago Tribune, Miami Herald, CBS News, CNN, NPR, Reuters, Associated Press and many other international, national and regional media.

CMI's research and corporate training clients span the globe, and include leaders from a wide range of industries. CMI studies have been produced for these and many other B2B and B2C brands: Aetna, Inc.; Prudential Financial; Wells Fargo; DIRECTV, LLC; Viacom/Logo; Johnson & Johnson; WNBA; Hallmark Cards, Inc.; Target Brands; E&J Gallo Winery; Gilead Pharmaceuticals; Better Homes & Gardens Real Estate; The Walt Disney Company; TELUS Corporation; Hyatt Hotels Corporation; Hawaiian Airlines; NYC & Company; Las Vegas Convention & Visitors Authority; VISIT FLORIDA; Canadian Tourism Commission; Tourism Office of Spain; Japan National Tourism Organization; U.S. Census Bureau; Centers for Disease Control; American Cancer Society; Kaiser Family Foundation; University of Pennsylvania; City University of New York; and numerous other corporations, universities and organizations across North America and around the world.



## ABOUT THE CMI RESEARCH PANEL

Over the past 20 years, CMI has developed the world's most community-representative panel for a variety of LGBT research methodologies. Corporations, government agencies, non-profits, universities and other research firms all utilize CMI's panel resources because of its size and flexibility. CMI can assist with research projects requiring thousands of participants, and we can deliver on smaller projects requiring targeted segments within LGBT. For example, CMI was able to recruit for projects needing 1,200 men living with HIV, 200 LGBT African American Millennials in urban U.S.A., and 750 transgender community members. We also produce qualitative projects that are challenging—or impossible—for other research groups to achieve.

CMI has developed our panel through authentic partnership and trust within the LGBT community. CMI never uses the panel for sales or marketing purposes. Panel members have the direct email addresses of their project's Research Director. We protect panelist confidentiality, and we respond to study questions, concerns and feedback within 24 hours. Since CMI is a specialized LGBT-owned and operated company, established over 20 years ago, we have earned a level of confidence and trust that can only come from being members of the community. As distinct from other panel approaches, we actually have a very personal relationship with our panelists, who are willing to open up and honestly share genuine experiences, sensitivities, opinions and motivations with us. They know that the results from the research will be used for the betterment of the LGBT community.

### CMI'S PANEL CONSISTS OF OVER 70,000 SELF-IDENTIFYING LGBT COMMUNITY MEMBERS, WHICH INCLUDES:

- 50,000 LGBT panelists in the United States
- 6,500 LGBT Canadians (includes English and French speaking)
- 4,500 LGBT Chinese
- Capabilities in the UK, Germany, Australia and other countries

### IN THE UNITED STATES, THE PANEL HAS SIGNIFICANT NUMBERS IN EVERY LGBT SEGMENT

- 20,000 lesbian and bisexual women
- 30,000 gay and bisexual men
- 1,500 transgender community members
- 5,000 bisexual community members
- 5,000 with income over \$150,000
- 5,000 with income below \$25,000
- 15,000 representing LGBT communities of color
- 15,000 LGBT Millennials
- Thousands of men living with HIV (Note: All health-related data is maintained independent of personally identifying information)
- Participants in all 50 states with ZIP code-level geographic targeting capability
- 10,000 with a master's degree or better
- 3,000 LGBT parents with a child under 18 living at home
- 5,000 legally married same-sex couples
- Experience with LGBT youth research (in partnership with an institution and IRB approval)

## CMI'S LGBT STRATEGIC PLANNING & CORPORATE TRAINING

**CONSULTING:** Evaluating your opportunities and strengths based on research findings, strategic consulting identifies brand and product positions that can lead to maximum success and return on investment. We'll also assess your corporate policies and practices—crucial to LGBT loyalty. LGBT consumers tend to vote with their wallets: they favor good corporate/community citizens.

**TRAINING:** The Community Marketing team has developed and presented custom on-site training for a wide variety of companies and organizations exploring their opportunities in the LGBT community. The trainings may include topics ranging from a basic introduction to the LGBT community, research, case studies and marketing opportunities...to diversity/sensitivity training best practices...to sales training and customer service.

*LGBT Community Survey and Community Marketing are registered trademarks of Community Marketing, Inc.*

*Minority/Diversity Procurement: Community Marketing, Inc. is an NGLCC-Certified LGBT-Owned Business Enterprise.*



## CONTACT US

Visit [www.CMI.info](http://www.CMI.info), email [research@CommunityMarketingInc.com](mailto:research@CommunityMarketingInc.com), or call +1 415-437-3800

584 Castro St., #834, San Francisco CA 94114 USA

# LGBT Market Research:

*There is a difference!*

LGBT research is meant to help marketers understand the LGBT community, and make educated decisions about strategies and tactics to reach them. Not all research is the same, however. At **Community Marketing & Insights**, we leverage unique experience, methodologies and our own proprietary panel to generate the valid and actionable results that our clients depend on.

---

## CMI'S PROPRIETARY PANEL: WHO ARE YOU TALKING TO?

Community Marketing & Insights (CMI) has recruited for our proprietary consumer panel over the past 20+ years by partnering with over 300 LGBT media, organizations, events and social media throughout the USA, Canada, the UK, Germany, Australia, China and beyond. The panel is thus highly representative of LGBT consumers who interact with the LGBT community and media.

CMI research is trusted by—and frequently quoted in—The New York Times, USA Today, The Wall Street Journal, Chicago Tribune, Los Angeles Times, Miami Herald, Forbes, Ad Week, NPR, CNN, CBS News, Associated Press, etc.

*Other research providers typically send out widely distributed panel invitations (via Yahoo, etc.), and then sort for those who trust the researcher enough to indicate in a survey that they are gay or lesbian. They may also use lists from one or two LGBT publishers, which is likely to skew results.*

*If you are a marketer looking for valid LGBT consumer insights about products, services, or advertising creative and marketing strategies, “general market” panel development approaches are not likely to yield LGBT community members who interact with the media where you are placing ads.*

## CMI'S QUANTITATIVE SURVEYS: SIZE DOES MATTER

CMI has conducted hundreds of LGBT-dedicated quantitative surveys since the early 1990s, covering a wide variety of topics, industries and interests. Through these studies, we both observe and influence the trends of this market.

Size does matter when it comes to surveys. Our panel has grown to over 70,000 qualified LGBT consumers—the largest of its kind, by far. Our Annual LGBT Community Survey® study has attracted up to 45,000 survey participants representing 150 countries, making it the largest such study in the world. We leverage our long history, experience and expertise to guide you, fine-tuning our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

If your communications channels are via the LGBT media, you'll want to depend on research that represents these consumers' interests, preferences, sensitivities and motivations.

*Without access to this enormous resource of qualified LGBT consumer panelists, other companies have to compromise on the quality and demographic representation of their panel—or “reinvent the wheel” at your expense.*

*It's not possible to fathom the diversity and complexities within LGBT (see below) through a small sample. And with small samples, you lose the opportunity to derive statistically-significant crosstabs based on gender, geographical location, age, income, experience, product choice, etc. Can you really make the assumption that a Millennial lesbian couple in Seattle has the same purchasing motivations and behaviors as a 67-year-old gay man in Atlanta? Generalities and sweeping statements about “the LGBT market” based on comparatively small samples can distort the validity of research findings, wasting your investment of time and resources.*

## LGBT PANEL DIVERSITY IS IMPERATIVE, BECAUSE THERE IS NO “LGBT MARKET”

Community Marketing & Insights emphasizes that there is no “gay market,” just as there is no single “Asian market.” The LGBT communities represent a broad and dynamic spectrum of interests, sensitivities, preferences and priorities. Add to that variations in geographical location, age, income, relationship status, gender identity and more, and it becomes essential to discover which opportunities within LGBT will help you achieve your goals. Fine-tuning your approaches based on highly refined, well-targeted matches within LGBT will make your outreach initiatives more efficient and cost-effective, optimizing your marketing investment.

*General market surveys that may include a small subset of “the gay community” just scratch the surface of the diverse and varied of opportunities marketers can enjoy if properly explored and understood.*

## GET A DEEPER UNDERSTANDING OF THE LGBT COMMUNITY: QUALITATIVE RESEARCH

For over two decades, CMI has produced the most consistent, longest-running series of LGBT community surveys in the world. But we don't stop there. Quantitative (data) research is important, but it's just one side of the coin. Our full range of research services uncover the rest of the story through qualitative research, most notably derived from focus groups.

We pre-qualify our focus group participants from among our survey panelists, identifying the best candidates based on characteristics such as age, gender, relationship status, geographical location, and even a propensity or history of using the client's products or services. We maintain sufficient numbers of panelists to conduct groups in most major metro areas across the USA, Canada, UK, Germany, Australia and China, as well as many other markets. Sometimes the same creative, tested in different regions, can yield different perspectives. Isn't it wise to know that—and adjust your plans—before investing in marketing campaigns?

CMI is the only LGBT-dedicated research provider that produces and facilitates qualitative research, including focus group studies (both in-person and online), in-depth interviews, online communities and advisory boards, which can round out a comprehensive market intelligence plan.

*By producing online surveys only, other research companies are telling only half of the story...at best. Without actual consumer interaction, they cannot fathom the deeper insights hiding behind the bar graphs and pie charts. Nor can they adequately advise you on the sensitivities and complexities that can only be uncovered by qualitative research—extremely important considerations that averages and assumptions extrapolated from survey statistics are likely to miss.*

## IN-HOUSE EVERYTHING. WE DON'T OUTSOURCE!

Community Marketing & Insights maintains our own research panels and utilizes advanced, sophisticated research software. We conduct all of our research in-house—because nobody knows this market segment as well as we do.

*Unlike many other firms, CMI will never sell or represent another research company's services. Nor will we outsource your projects and report on the results of a third party's work. Without being intimately involved in every aspect of a project—discussing client goals, designing the study, building and implementing the survey, and engaging directly with consumers in focus groups—it is difficult to gain the insights that we regularly deliver. CMI's hands-on LGBT research specialization spanning over two decades is unmatched.*

## VALUE FOR THE INVESTMENT

You might think that with this kind of specialization and experience, you'd have to invest considerably more for Community Marketing & Insights services than for research from other companies. With our specific focus on LGBT market intelligence, however, and the cumulative 60+ years of LGBT-dedicated experience among the CMI team, we're able to keep your costs low. We don't spend your money locating qualified survey or focus group participants, and we won't waste time trying to source comparative data or case studies. We've already done all that, for your benefit, over the past 20+ years.

*At CMI, we're not running a large operation juggling many accounts and projects with varied focus. Our client dedication and LGBT market specialization delivers you superior intelligence at a fraction of the cost.*

## WE ARE TRUSTED. WHY THIS IS IMPORTANT:

Community Marketing, Inc., founded in 1992, pioneered LGBT consumer research. Because our company is LGBT-owned and -operated, and well known in the community, we have earned the recognition and trust of our survey panelists. LGBT consumers recognize that we use research data to build corporate relationships that ultimately lead to social progress, better conditions for LGBT employees, and more sensitive communications.

## PROUDLY LGBT-OWNED AND -OPERATED

One of the questions in HRC's Corporate Equality Index application is whether the applicant company includes LGBT-owned suppliers when sourcing products and services. When you contract with Community Marketing & Insights, you not only gain the benefit of our long-standing leadership in this field, you are working with one of the world's only LGBT-owned market research providers. Community Marketing, Inc. is an NGLCC Certified LGBT-Owned Business Enterprise.

## AND PROUD OF OUR COMMUNITY CITIZENSHIP

CMI is involved in the LGBT community: We volunteer time, donate resources and raise funds for numerous community-based organizations. We also participate in leading business and advocacy organizations, events and conferences within the community, such as Out & Equal, HRC, National Gay & Lesbian Chamber of Commerce, GLAAD, NCLR and the International Gay & Lesbian Travel Association. Our community connection is not only the right thing to do, it is essential for maintaining authentic community relationships to benefit our clients.

*Proud to serve these and other companies, organizations, universities, government institutions and researchers with*

**LGBT Community Studies,  
Strategic Consulting and Corporate Training**  
*since 1992*