



24th Annual LGBTQ Tourism & Hospitality Survey

The LGBTQ Tourism & Hospitality Survey is a public report produced for 24 years by Community Marketing & Insights (CMI).

This report is designed to help inform the planning and communications of destinations, hotels, and travel-related suppliers that outreach to the community through LGBTQ media, events, and sponsorships.

The goal of the research is to support and grow the LGBTQ travel industry.

Results and charts may be used by any organization as long as credited to Community Marketing & Insights.



ABOUT CMI

25+ YEARS OF LGBTQ INSIGHTS



- › Community Marketing & Insights (CMI) is an LGBTQ-owned and –operated market research firm that has been conducting LGBTQ consumer studies for over 25 years. Our practice includes online surveys, in-depth interviews, intercepts, focus groups (on-site and online), and advisory boards. 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 from CMI’s research reports 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, NPR, CNN, Reuters, 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: NYC & Company, VisitBritain, Argentina Tourism Office, West Hollywood Travel + Tourism Board, Travel Portland, Las Vegas CVA, Visit Raleigh, Greater Fort Lauderdale CVB, Tourism Toronto, Visit Florida, Greater Miami Convention & Visitor’s Bureau, Discover Puerto Rico, Visit Salt Lake, Hawaii Tourism Authority, Tourisme Montréal, W Hotels, Kimpton Hotels, Hawaiian Airlines, Wells Fargo Bank, Aetna, Target Brands, Hallmark, DirecTV, Johnson & Johnson, WNBA, AARP, Kaiser Family Foundation, Freddie Mac, U.S. Census and numerous other corporations, organizations, universities and government institutions across North America and around the world.



RESEARCH DESIGN

25 YEARS OF LGBTQ INSIGHTS

Community Marketing & Insights (CMI) has built our proprietary research panel of **45,000+ LGBTQ consumers** through partnerships with more than 300 LGBTQ publications, websites, blogs, social media, apps, events, influencers, and organizations since 1992. Importantly, the panel reflects the readership/membership of a broad range of LGBTQ-focused media outlets, organizations, and events. This means that the results summarized here are representative of LGBTQ travelers who are “out” and interacting within the LGBTQ community.

- › 10-minute online survey conducted in October and November of 2019.
- › This report focuses on United States data for 5,355 self-identified members of the LGBTQ community, including 3,341 gay and bi+ men, 1,535 lesbian and bi+ women, and 479 transgender and non-binary community members.
- › All 50 states were represented. The top five states were California 10%, New York 8%, Florida 7%, Texas 6%, and Illinois 5%.
- › Generation breakdowns were 1,655 Millennial+, 1,647 Generation X, and 2,053 Baby Boomers.
- › Respondents were entered into a drawing for a chance to win one of twenty \$50 prizes in cash or Amazon credit in recognition of their time to participate in the study.
- › In order to balance the opinion by gender and generation, results were weighted and calculated with the following assumptions; Millennial+ (1981-2001) 33%, Generation X (1965-1980) 33%, Baby Boomers (1946-1964) 33%; gay and bi+ men 47%, lesbian and bi+ women 47%, gender-expansive (transgender, trans woman, trans man, non-binary gender identity, genderqueer, and gender fluid) 6%.
- › The results are meant to provide a reasonably balanced opinion of LGBTQ community members who are “out” and interacting with LGBTQ media, events, and organizations. These results do not necessarily represent LGBTQ community members who are not out or not interacting within the LGBTQ community.
- › In this report, some percentages may not add up to 100% due to rounding or multiple selections allowed.

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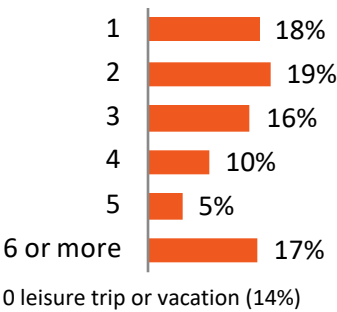
LGBTQ TRAVEL BY THE NUMBERS



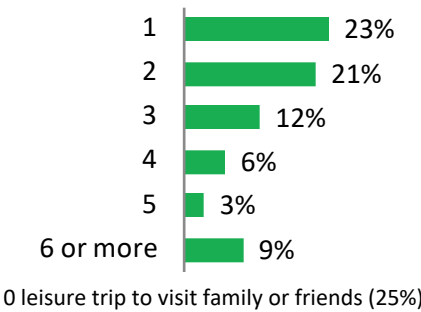
LGBTQ TRAVEL BY THE NUMBERS: On average, LGBTQ participants took 3.1 vacation or leisure trips and 1.5 business trips in the past 12 months. In addition, participants took an average of 2.2 trips primarily to visit family or friends in the past year. Compared to 2018, the number of trips that LGBTQ participants completed in 2019 was very consistent for each category.

Past Year Travel – Number of Trips

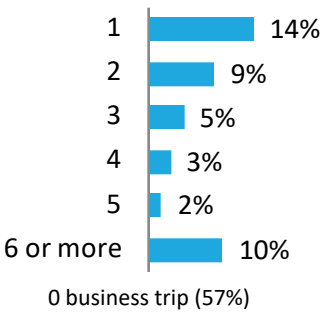
Primarily vacation or leisure trip



Visit family or friends
as primary reason for travel



Primarily business trip



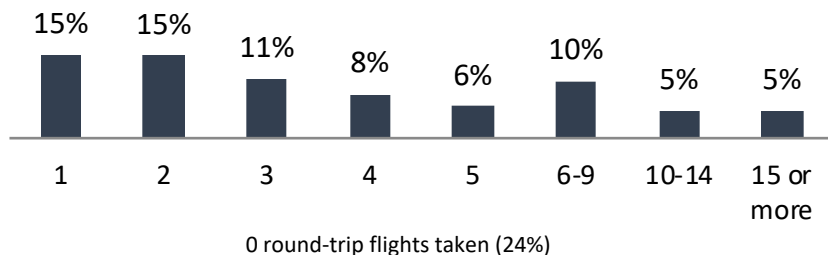
LGBTQ TRAVEL BY THE NUMBERS: The average participant took 4 round-trip flights and spent 11 nights in a paid accommodation. These averages were similar to 2018.

Past Year Travel – Flights & Nights

Total Number of Round-trip Flights



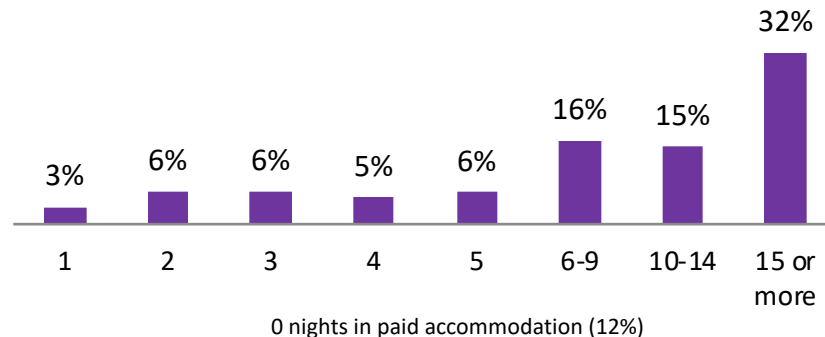
Avg. number of round trip flights taken in the past 12 months



Total Number of Nights in Any Paid Accommodation



Avg. nights in paid accommodation in the past 12 months

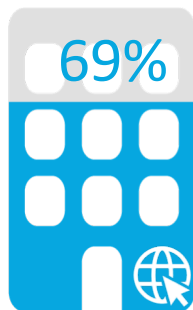


BOOKING HOTELS: Compared to last year, booking methods were largely unchanged. Of note are the generational and gender differences for using Airbnb or a similar site. Baby Boomers were up 3% in 2019 for using Airbnb or similar site.

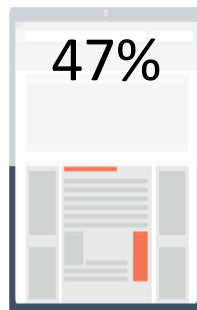
In the past 12 months, how have you purchased a hotel room or paid accommodation?

(Please mark any that apply over the past year.)

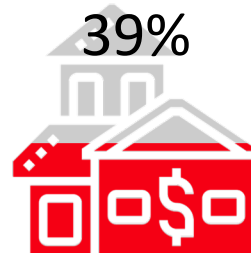
Among All LGBTQ Travelers



Hotel's website /
direct with
individual hotel or
brand's website



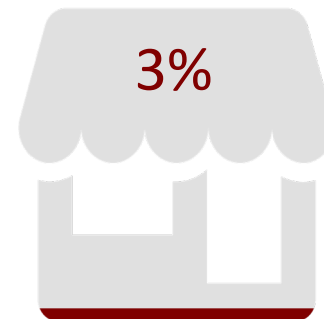
Online travel agency /
multiple hotel booking
website (e.g. Expedia,
Booking.com, Priceline,
etc.)



Airbnb, Vrbo or similar site

Millennials+	53%
Generation X	36%
Baby Boomers	27%

Women	44%
Men	35%
Transgender & Non-binary Participants	29%



Retail travel agency
(location in town,
retail store, etc.)

Other 9%

Did not purchase 7%

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TRAVEL MOTIVATIONS



VACATION MOTIVATIONS: For LGBTQ participants, relaxation, getting away from typical life, and exploring someplace new were the three most important reasons to take a vacation. Note the small percentage who indicated that celebrating or exploring LGBTQ community or life was a key vacation motivator. This result might caution travel companies to not overplay the “LGBTQ card” in promoting their destination or product. Escape seems to be the most important theme that motivates vacation planning.

What motivates you to take vacations?

Please mark any reasons that motivated you to book a trip in the past 12 months.

	All LGBTQ Travelers	Millennials+	Generation X	Baby Boomers
To rest and relax	73%	72%	78%	67%
To get away from my typical everyday life	69%	75%	73%	59%
To explore someplace new	69%	72%	67%	66%
To return to a place that I know and enjoy	53%	52%	53%	53%
To experience and learn about other cultures	47%	48%	46%	46%
To celebrate or mark a special occasion	44%	51%	46%	37%
To restore work/life balance	44%	51%	49%	30%
To seek adventure	42%	49%	42%	34%
To feel alive and energetic	37%	43%	37%	30%
To splurge on myself or on my family/friends	35%	39%	37%	29%
To engage in a personal passion, activity or hobby	33%	37%	32%	30%
To see for myself the authentic things I have read or heard about	30%	31%	28%	31%
To celebrate or explore LGBTQ community or life	25%	27%	27%	22%
None of the above	1%	1%	1%	2%

SELF-CARE & PERSONAL CONNECTIONS: By far, participants are looking to travel to have fun or bring joy to their life. Travel companies should promote how their destination or service helps the LGBTQ community reach that goal. Lesbian and bi+ women had higher percentages for connecting with partners and children, partially because they are more likely to be in relationships and/or be parents.

**Think about your own self-care and the personal connections that are important to you.
In the past 12 months, what were you trying to achieve through travel? Please mark all that apply to you.**

	Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary Participants
Just to have fun or bring joy to my life	88%	88%	79%
To clear my head, heal or emotionally replenish myself	52%	54%	54%
To connect with my partner or spouse	36%	50%	37%
To connect with one or more friends	34%	32%	27%
To reconnect with personal goals or interests	21%	23%	27%
To connect with a parent, sibling or other family members	20%	27%	25%
To sexually connect with locals at the destination	20%	1%	8%
To connect with my children	4%	12%	13%
None of the above apply for my travel	1%	1%	1%



SOURCES OF STRESS: For all LGBTQ participants, political issues are the top source of stress, especially for lesbian and bi+ women and gender-expansive community members. This stress is likely to be especially high in 2020 with the upcoming U.S. election. For gay and bi+ men, both work and political issues are the highest sources of stress. Only 8% of the participants said that they were not stressed.

**Often people take vacations to de-stress. We are curious, what is stressing you out the most right now?
Please mark all that apply to you.**

	All Travelers	Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary Participants
Political and social issues in my country or other countries	53%	48%	58%	61%
My work	50%	53%	48%	45%
My financial situation or money	45%	43%	45%	58%
My health	18%	15%	20%	30%
LGBTQ-related discrimination	14%	11%	15%	36%
My relationships with my family	14%	14%	13%	21%
Discrimination due to race, ethnicity, age, or other non-LGBTQ reason	10%	9%	11%	19%
My relationship with a spouse or partner	10%	9%	11%	9%
My studies or school	8%	5%	10%	12%
My friends	4%	4%	3%	5%
Other stressors than above	16%	15%	17%	18%
I am not stressed	8%	9%	7%	3%



Base: All LGBTQ Travelers n=5,347;
Gay & Bi+ Men n=3,335; Lesbian & Bi+ Women n=1,533; Gender Expansive n=479



CMI Community Marketing & Insights
Leaders in LGBTQ Research since 1992

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DESTINATIONS



DESTINATIONS SECTION SUMMARY

Safe and LGBTQ-friendly: Destinations must be LGBTQ-welcoming and safe to attract LGBTQ tourism. A destination being an LGBTQ hotspot is not a primary motivator. Many community members live in LGBTQ-popular cities and might not be looking for that for a vacation.

Food Scenes: A city's restaurant food scene continues to be a primary motivator. Promote your culinary scene, and when possible include famous LGBTQ chefs and restaurants when promoting to the community. Food trends are somewhat more important to Millennials than older generations.

Historical Sites and Famous Attractions: It may surprise some that historical sites and famous attractions rank so high as an LGBTQ motivator. CMI has seen this throughout our destination research and it is important across all demographics. Don't be afraid to showcase what your city is known for in your LGBTQ communications.

Neighborhoods: LGBTQ community members are interested in exploring all of the city's neighborhoods. Feature your LGBTQ neighborhood and any progressive neighborhood that make sense for LGBTQ travel. If a destination does not have an LGBTQ neighborhood, that is fine. LGBTQ community members want to explore many neighborhoods in a city as long as these are fun and safe.

Family: While family activities are important to a small percentage of the LGBTQ community, they are important to 48% of the LGBTQ parents.

Nightlife: LGBTQ nightlife is a motivation to about half of gay and bi+ men and a much smaller percentage of women and gender-expansive participants. Nightlife is also more important to younger travelers.

Museums: Many LGBTQ community members visit museums when visiting a city; especially quirky/unique museums, history museums, and contemporary art museums. While LGBTQ-related museums and memorials ranks lower, that is most likely due to so few destinations having this asset.

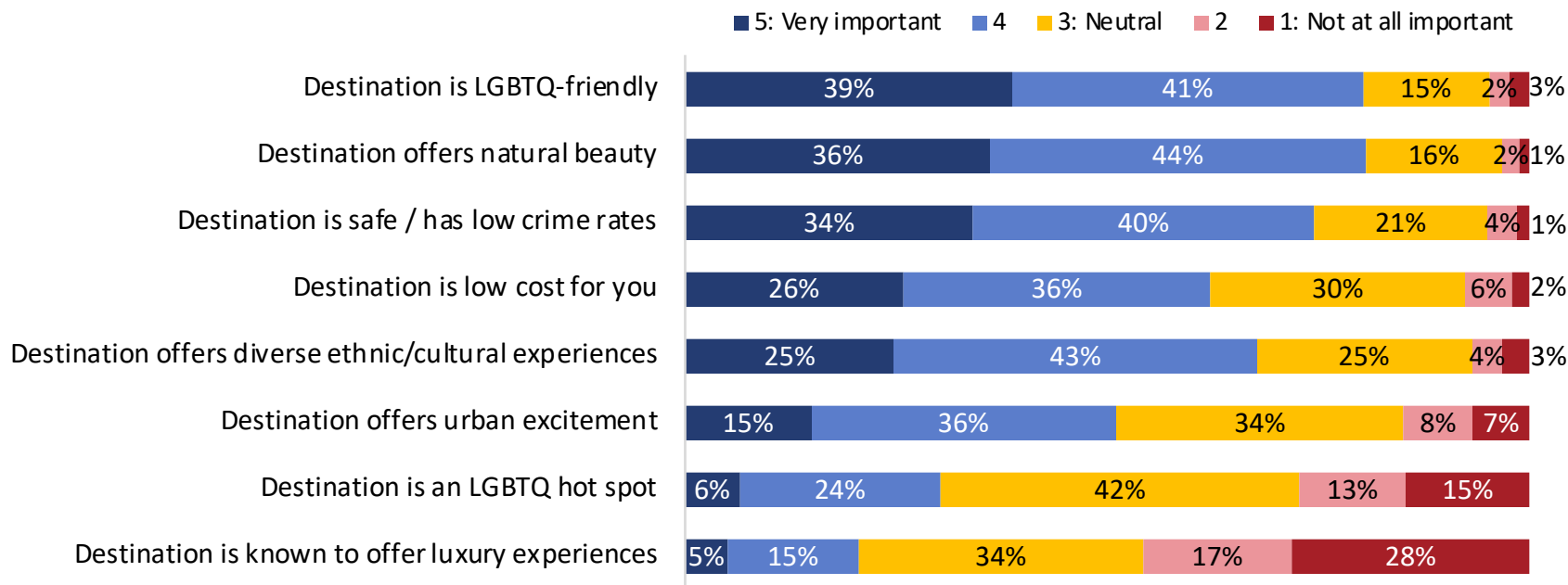
Outdoor Travel: Outdoor activities tend to rank higher for lesbian and bi+ women than gay and bi+ men. Younger participants were also more motivated by outdoor adventures. Coastal areas, hiking, and national parks were most likely to motivate outdoor or nature-based vacations.

Natural Beauty: Natural beauty was important to all participants. Of course scenic beauty can be found in both urban and outdoor destinations.

Destination Rankings: CMI's annual LGBTQ destination rankings remain largely unchanged. Compared to last year, most destinations were even, or up by 1%. A few new small and mid-sized destinations were added to the ranking this year; an on-going trend as more and more destinations of every size across the globe outreach to the LGBTQ community.






KEY ATTRIBUTES FOR LGBTQ DESTINATION SELECTION

On a 5-point scale, how important are the following, in your vacation destination selection process?
Among All LGBTQ Travelers



Demographic Differences

On a 5-point scale, how important are the following, in your vacation destination selection process?

Selected 5 Very Important or 4 Important on the 5-point Scale		Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary Participants	Millennials+	Generation X	Baby Boomers
	Destination is safe / has low crime rates	74%	75%	67%	68%	76%	80%
	Destination is LGBTQ-friendly	80%	81%	79%	82%	81%	78%
	Destination is an LGBTQ hotspot	37%	23%	35%	34%	31%	26%
	Destination offers urban excitement	64%	39%	42%	60%	48%	45%
	Destination offers natural beauty	75%	86%	81%	77%	80%	84%

Base: Gay & Bi+ Men n=3,341; Lesbian & Bi+ Women n=1,535; Gender Expansive n=479;
Millennials+ n=1,655; Gen X n=1,647; Boomers n=2,053

Top U.S. Destinations | Leisure | Gay & Bi+ Men | 2019

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

Destination	% Visited
New York City	25%
Chicago	15% - 16%
Las Vegas	15% - 16%
Los Angeles Metro Area	15% - 16%
San Francisco	15% - 16%
Ft. Lauderdale/Wilton Manors	12% - 14%
Miami/ South Beach	12% - 14%
Orlando	12% - 14%
Palm Springs	12% - 14%
Washington, DC	12% - 14%
New Orleans	10% - 11%
San Diego	10% - 11%
Seattle	10% - 11%

Destination	% Visited
Atlanta, Boston, Dallas, Denver, Key West/Florida Keys, Hawaii, Philadelphia, Phoenix, Portland OR, Provincetown, Tampa/St. Petersburg	7% - 9%
Alaska, Albuquerque, Asheville, Austin, Baltimore, Charleston, Cincinnati, Cleveland, Charlotte, Columbus, Detroit, Grand Rapids, Houston, Indianapolis, Kansas City, Louisville, Madison, Milwaukee, Minneapolis, Myrtle Beach, Napa County, Naples/Marco Island, Nashville, Ogunquit, Pittsburgh, Portland ME, Puerto Rico, Raleigh/Durham/Chapel Hill, Rehoboth Beach, Reno/Lake Tahoe, Richmond, Salt Lake City, Saugatuck, San Antonio, Santa Fe, St. Louis, Savannah, Sacramento, Sonoma County, Tucson	3% - 6%

Base: All Gay & Bi+ Men n=3,132

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 | Lesbian & Bi+ Women | 2019

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

Destination	% Visited
New York City	18%
Chicago	11% - 13%
Las Vegas	11% - 13%
Los Angeles Metro Area	11% - 13%
San Francisco	11% - 13%
Washington, DC	11% - 13%
Boston	8% - 10%
Denver	8% - 10%
Orlando	8% - 10%
Philadelphia	8% - 10%
Portland, OR	8% - 10%
San Diego	8% - 10%
Seattle	8% - 10%

Rank	Destination	% Visited
Other Top Cities	Atlanta, Baltimore, Fort Lauderdale, Hawaii, Miami/South Beach, New Orleans, Palm Springs, Phoenix, Provincetown, Tampa/St. Petersburg	6% - 7%
Other Top Cities	Alaska, Albuquerque, Asheville, Austin, Charleston, Charlotte, Cincinnati, Cleveland, Columbus, Dallas, Detroit, Key West/Florida Keys, Houston, Indianapolis, Louisville, Madison, Milwaukee, Minneapolis, Napa County, Naples / Marco Island, Nashville, Pittsburgh, Portland ME, Raleigh/Durham/Chapel Hill, Rehoboth Beach, Richmond, Reno/Lake Tahoe, Sacramento, Salt Lake City, Santa Cruz, Santa Fe, Savannah, St. Louis, Sonoma County, Rehoboth Beach, Tucson	3% - 5%

Base: All Lesbian & Bi+ Women n=1,535

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. LGBTQ | 2019

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

Destination	% Visited
New York City, Washington, DC	7% to 8%
Atlanta, Boston, Chicago, Dallas, Las Vegas, Los Angeles, Orlando, Philadelphia, San Francisco, Seattle	4% to 6%
Austin, Baltimore, Denver, Detroit, Ft. Lauderdale / Wilton Manors, Houston, Miami / South Beach, Minneapolis, Nashville, New Orleans, Phoenix, Raleigh/Durham/Chapel Hill, San Diego, Tampa/St. Petersburg	2% to 3%

Base: All LGBTQ n=5,355

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 | Leisure | U.S. LGBT Travelers | 2019

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

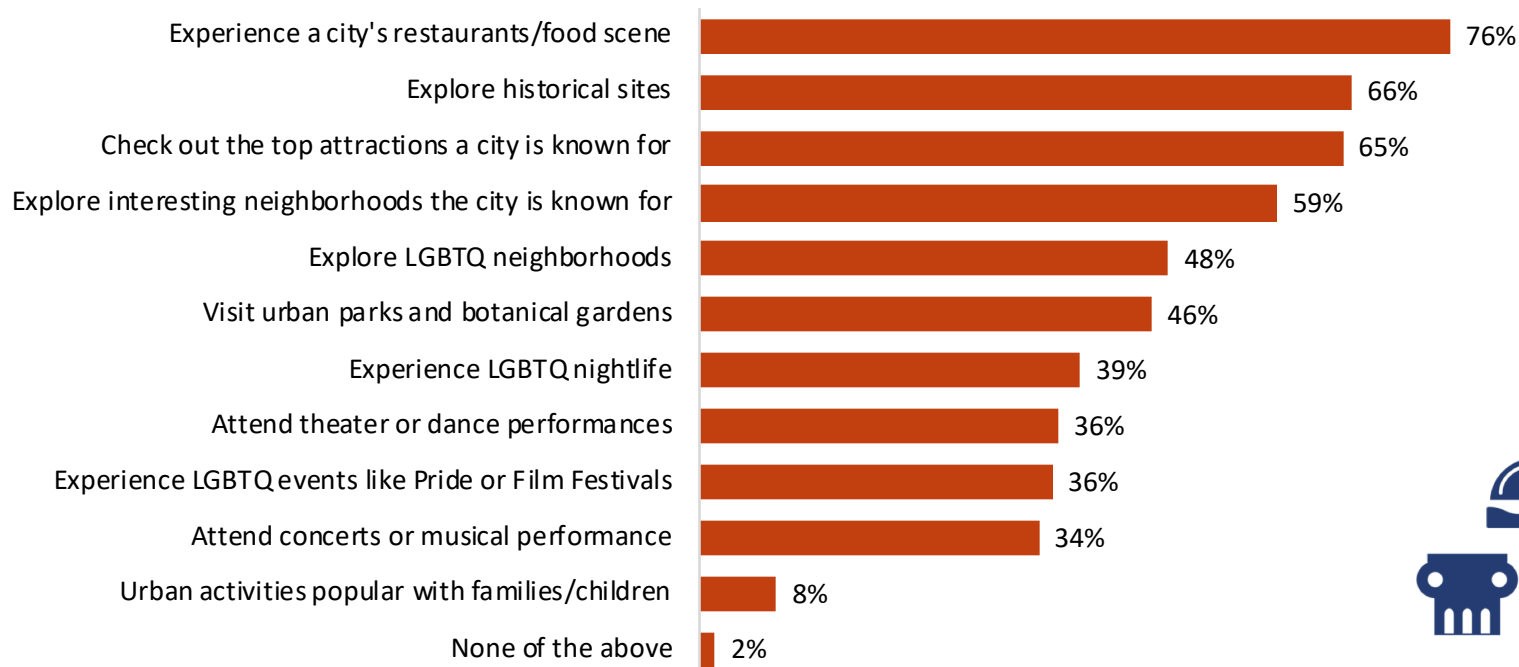
Top Destination Among Men	% Visited
Canada (Any destination listed)	15%
Toronto	5%
Vancouver	5%
Montreal	5%
Mexico (Any destination listed)	12%
Puerto Vallarta	7%
Cancun	5%
Mexico City	3%

3% or over Among Men	% Visited
Great Britain	9%
France	7%
Spain	6%
Germany	6%
Italy	6%
Netherlands / Holland	5%
Puerto Rico	4%
Japan	3%
Australia	3%

Top Destination Among Women	% Visited
Canada (Any destination listed)	12%
Vancouver	4%
Toronto	4%
Montreal	3%
Mexico (Any destination listed)	8%
Cancun	5%
Puerto Vallarta	3%
Other Top Destinations Over 3%	% Visited
Great Britain	6%
France	5%
Italy	4%
Netherlands	3%
Spain	3%

URBAN TRAVEL MOTIVATIONS • ALL LGBTQ

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



URBAN TRAVEL MOTIVATIONS • BY DEMOGRAPHIC

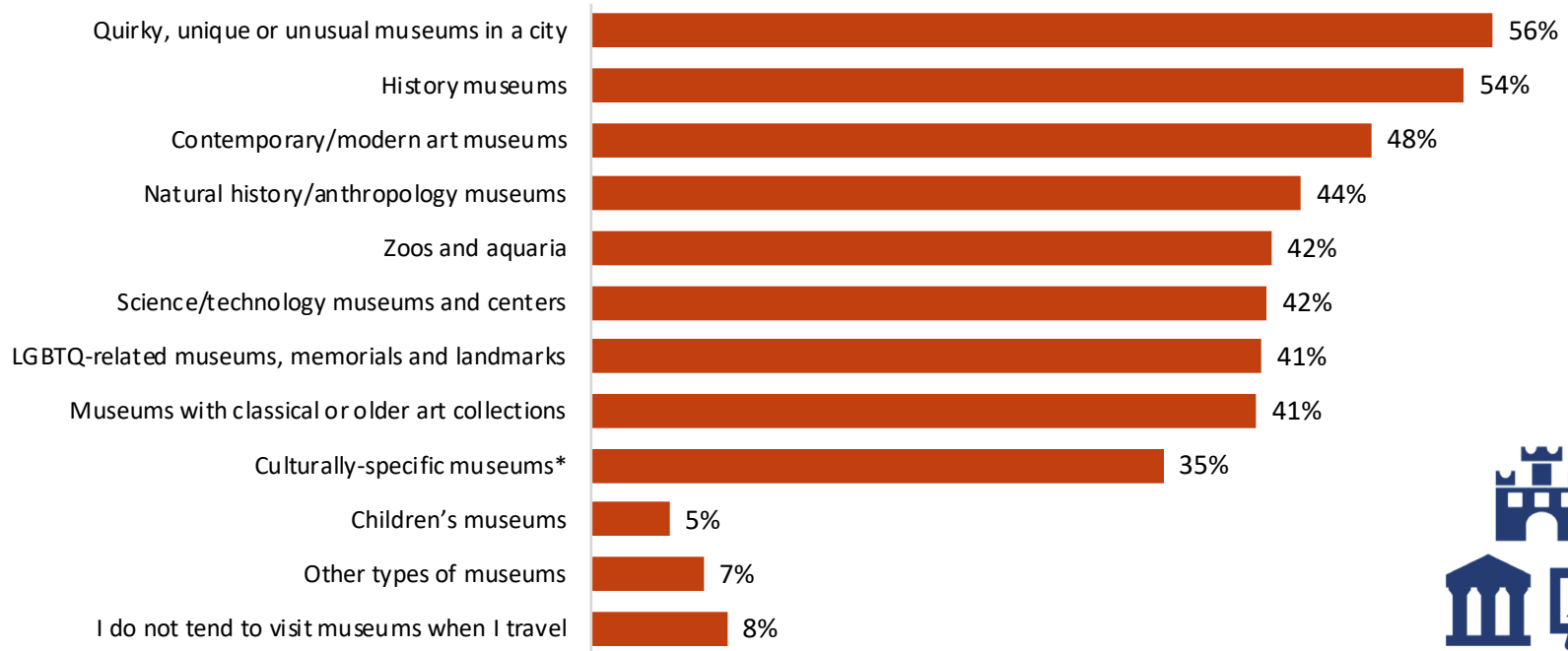
When you think of a vacation to an urban destination, what activities attract you the most? Please mark all that apply.

	Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary Participants	Millennials+	Generation X	Baby Boomers
Experience a city's restaurants/food scene	76%	78%	66%	81%	76%	72%
Explore historical sites	67%	66%	61%	65%	67%	67%
Check out the top attractions a city is known for	68%	65%	46%	67%	65%	64%
Explore interesting neighborhoods the city is known for	60%	59%	44%	63%	58%	55%
Explore LGBTQ neighborhoods	53%	43%	43%	54%	49%	40%
Visit urban parks and botanical gardens	44%	49%	41%	53%	43%	41%
Experience LGBTQ nightlife	50%	28%	32%	47%	39%	30%
Attend theater or dance performances	37%	37%	31%	34%	36%	40%
Experience LGBTQ events like Pride or Film Festivals	35%	36%	40%	39%	37%	31%
Attend concerts or musical performance	32%	37%	35%	34%	34%	35%
Urban activities popular with families/children	5%	11%	7%	9%	12%	3%
None of the above	2%	1%	4%	1%	2%	3%

Base: Gay & Bi+ Men n=3,341; Lesbian & Bi+ Women n=1,535; Gender Expansive n=479;
Millennials+ n=1,655; Gen X n=1,647; Boomers n=2,053

MUSEUM TYPES OF INTEREST • ALL LGBTQ

And what type of museums do you tend to visit in urban destinations? Please mark all that apply.
Among All LGBTQ Travelers



*Culturally-specific museums (such as museums based on a specific ethnicity, religion, etc.)
Base: All LGBTQ Travelers n=5,355

MUSEUM TYPES OF INTEREST • BY DEMOGRAPHIC

And what type of museums do you tend to visit in urban destinations? Please mark all that apply.

	Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary Participants	Millennials+	Generation X	Baby Boomers
Quirky, unique or unusual museums in a city	50%	62%	57%	60%	57%	51%
History museums	55%	53%	56%	52%	55%	56%
Contemporary/modern art museums	49%	49%	37%	53%	46%	45%
Natural history/anthropology museums	39%	48%	50%	45%	45%	42%
Zoos and aquaria	39%	45%	43%	46%	44%	37%
Science/technology museums and centers	41%	42%	49%	45%	45%	36%
LGBTQ-related museums, memorials and landmarks	38%	44%	49%	46%	41%	37%
Museums with classical or older art collections	44%	39%	34%	41%	40%	43%
Culturally-specific museums	31%	40%	39%	42%	35%	29%
Children's museums	2%	8%	6%	6%	7%	1%
Other types of museums	8%	6%	12%	6%	7%	8%
I do not tend to visit museums when I travel	10%	7%	9%	8%	8%	9%

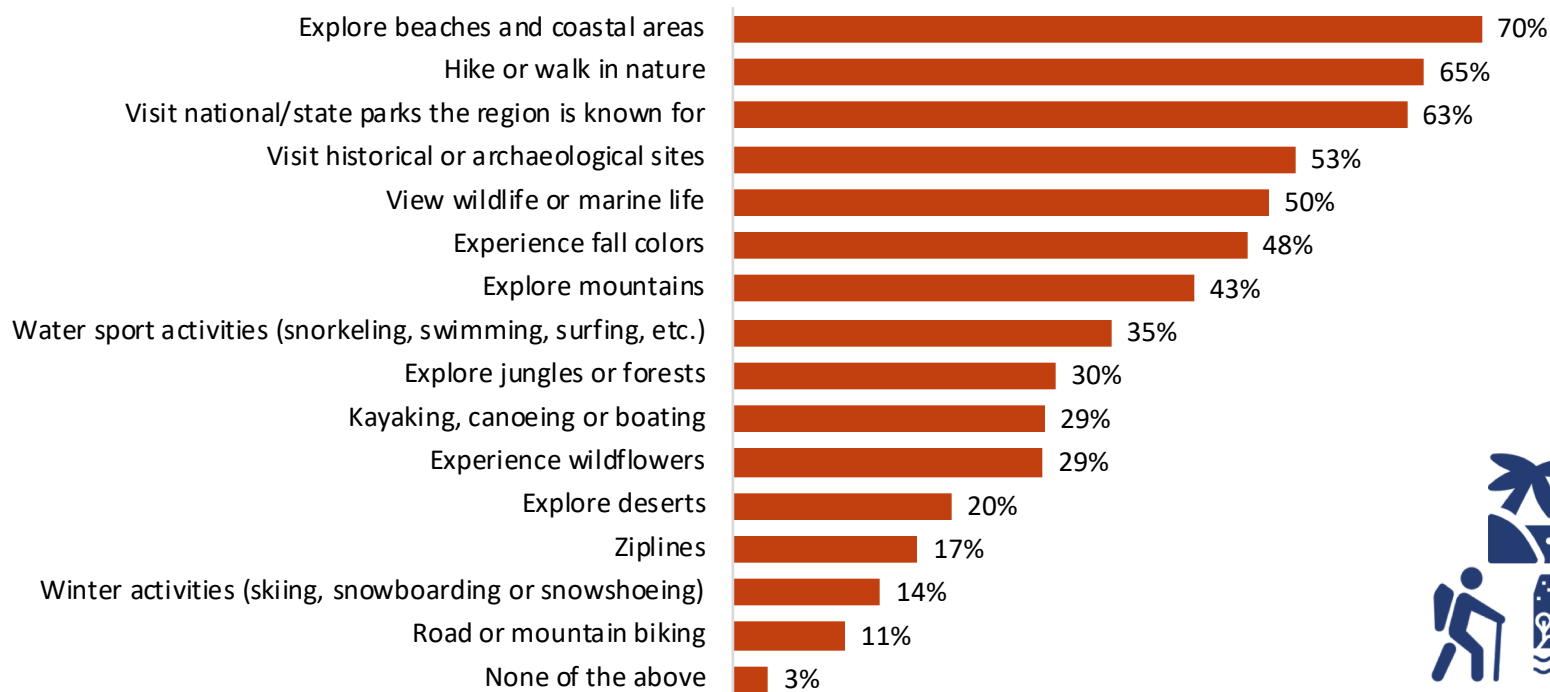
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OUTDOOR TRAVEL MOTIVATIONS • ALL LGBTQ

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



Base: All LGBTQ Travelers n=5,355

OUTDOOR TRAVEL MOTIVATIONS • BY DEMOGRAPHIC

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

	Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary Participants	Millennials+	Generation X	Baby Boomers
Explore beaches and coastal areas	68%	73%	64%	71%	73%	67%
Hike or walk in nature	60%	69%	66%	72%	65%	57%
Visit national/state parks the region is known for	57%	70%	59%	68%	62%	60%
Visit historical or archaeological sites	54%	51%	55%	49%	54%	55%
View wildlife or marine life	44%	57%	51%	51%	51%	49%
Experience fall colors	42%	54%	50%	49%	46%	50%
Explore mountains	40%	47%	44%	51%	42%	37%
Water sport activities (snorkeling, swimming, surfing, etc.)	34%	38%	24%	37%	39%	30%
Explore jungles or forests	30%	31%	28%	38%	30%	23%
Kayaking, canoeing or boating	23%	35%	27%	36%	29%	23%
Experience wildflowers	22%	35%	32%	30%	29%	28%
Explore deserts	20%	21%	22%	22%	20%	19%
Ziplines	19%	17%	13%	21%	17%	13%
Winter activities (skiing, snowboarding or snowshoeing)	15%	14%	11%	18%	15%	8%
Road or mountain biking	11%	10%	10%	11%	12%	8%
None of the above	4%	3%	3%	3%	3%	5%

Base: Gay & Bi+ Men n=3,341; Lesbian & Bi+ Women n=1,535; Gender Expansive n=479;
Millennials+ n=1,655; Gen X n=1,647; Boomers n=2,053

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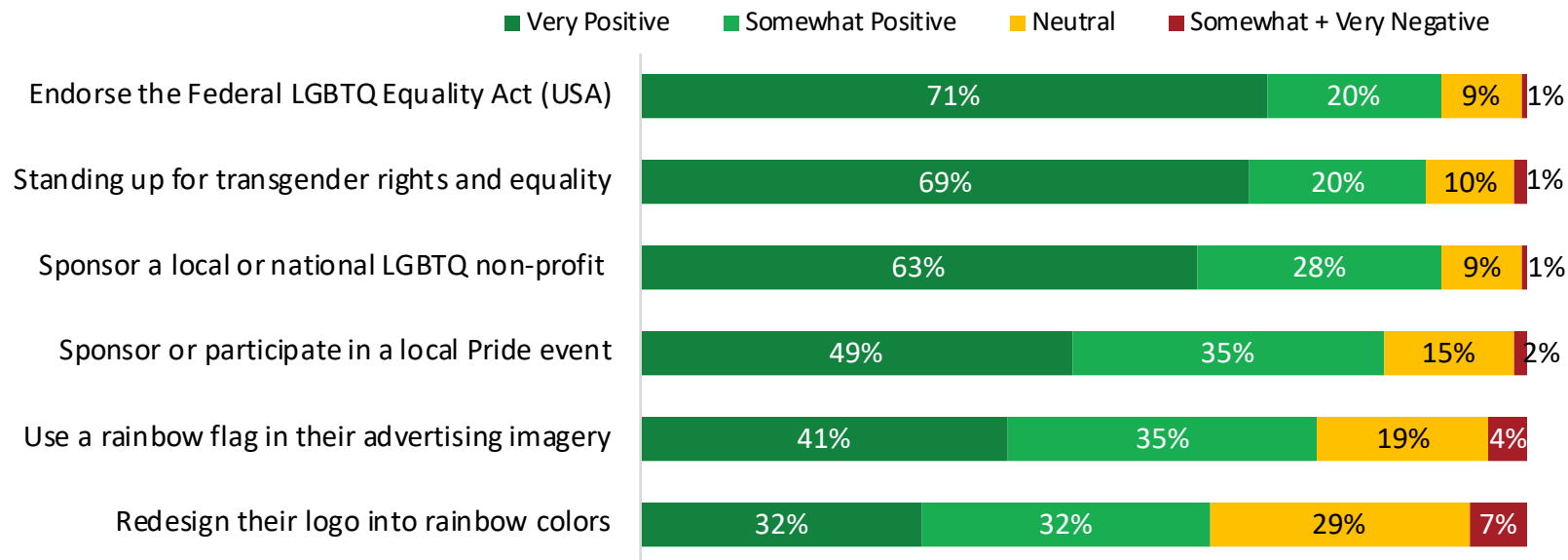
A FEW MORE LGBTQ TRAVEL TOPICS



REACTION TO OUTREACH STRATEGIES: LGBTQ communities were positive about all the outreach strategies tested. In a time when some in the community are questioning corporate support of the LGBTQ community, it is important to remember that the vast majority of the LGBTQ community welcomes corporate support, and perhaps now more than ever.

**How do you feel about a travel company (airline, hotel, tour operator, etc.)
when you see these common types of outreach strategies?**

Among All LGBTQ Travelers



ALL-GENDER RESTROOMS: Participants encourage travel companies to provide restroom options for all in the LGBTQ community. Moving towards all-gender restrooms can make everyone feel welcome.

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



	All LGBTQ Travelers	Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary Participants	Millennials+	Generation X	Baby Boomers
Significantly more positive about the hotel/restaurant	61%	51%	70%	82%	70%	62%	52%
Somewhat more positive about the hotel/restaurant	19%	21%	18%	12%	17%	19%	21%
Neutral: It makes no difference to me	17%	25%	10%	5%	11%	17%	23%
More negative about the hotel/restaurant	2%	3%	2%	1%	2%	2%	4%
Prefer not to answer or images did not display	1%	0.5%	1%	0%	0.4%	1%	1%

Base: All LGBTQ Travelers n=5,014; Gay & Bi+ Men n=3,129; Lesbian & Bi+ Women n=1,466; Gender Expansive n=419; Millennials+ n=1,574; Gen X n=1,551; Boomers n=1,889

SHOPPING WHILE ON VACATION: Shopping is not a key motivator for destination differentiation and selection. However, CMI research often shows that once a visitor arrives at a destination, the LGBTQ shopping spend is similar to the general population. LGBTQ people shop at destinations, but it is not a primary motivator.

When you think about shopping while on vacation, which of the following statements apply to you?
Please mark all that apply.

	All Travelers	Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary Participants
Shopping is really not relevant to why I pick one destination over another	67%	65%	69%	67%
I purchase local-made or unique products to remember my trip	62%	57%	68%	58%
I am more likely to splurge on a purchase while traveling than at home	35%	34%	35%	37%
I travel to purchase products that are cheaper than the prices at home	8%	10%	5%	7%
I pick destinations because of their shopping opportunities	3%	4%	2%	3%
I travel to destinations specifically to shop for designer brand or high-end products	2%	3%	1%	0%
None of the above	2%	3%	2%	3%



Base: All LGBTQ Travelers n=5,347;
Gay & Bi+ Men n=3,336; Lesbian & Bi+ Women n=1,532; Gender Expansive n=479

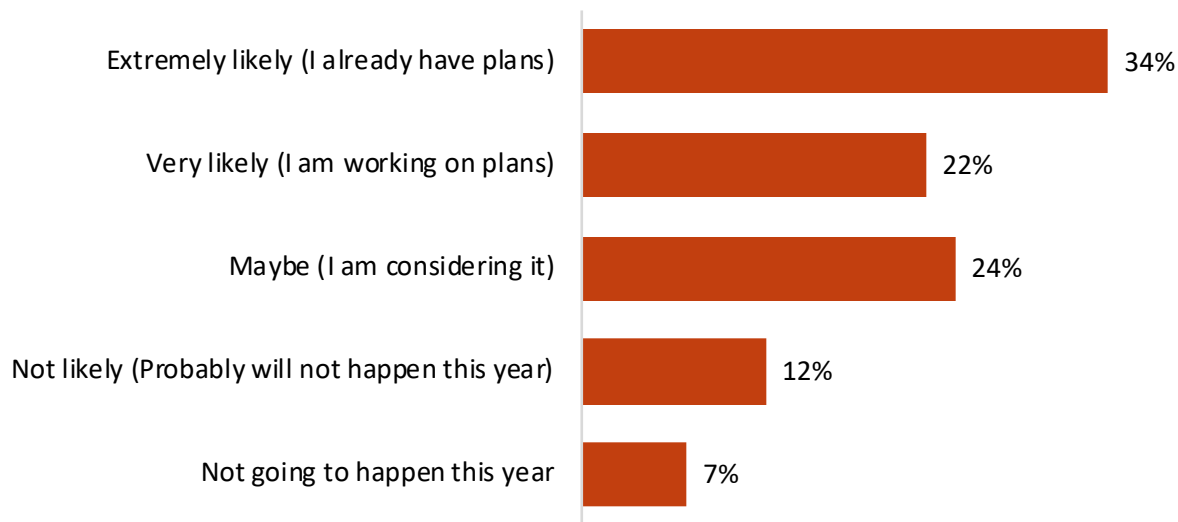
INTERNATIONAL VACATION: 79% of the research participants indicated having a valid passport (77% last year). Just over half of participants said that they are likely to travel internationally next year.



79%

of All LGBTQ Travelers
Have a Valid Passport

How likely are you to go on a vacation outside your home country in the next 12 months? Among All LGBTQ Travelers Who Have a Valid Passport



23rd Annual LGBTQ Tourism & Hospitality Survey

*CMI cannot ask every question,
every year.*

*Following are some highlights from
last year's report to help
round out the understanding of
LGBTQ travelers.*



PRICE POINT FOR LGBTQ TRAVELERS: LGBTQ travelers tend to be more moderate-price travelers, although there are some gender and generational differences. Few participants see themselves as pure luxury or budget travelers, however larger percentages are willing to partially embrace those travel identities.

If you had to pick one, what type of price point traveler are you?

TRAVELER TYPE	All LGBTQ	Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary Participants	Millennials+	Generation X	Baby Boomers
5 - Luxury traveler	4%	5%	3%	3%	2%	4%	6%
4 - Moderate price traveler, with a little luxury	33%	38%	29%	22%	21%	38%	39%
3 - Moderate price travel	22%	24%	25%	18%	23%	25%	23%
2 - Budget traveler with an occasional splurge	30%	26%	33%	34%	41%	26%	22%
1 - Budget / economy traveler	10%	8%	10%	24%	14%	6%	9%

Base: All LGBTQ n=5,709; Gay & Bi Men n=3,567; Lesbian & Bi Women n=1,708;
Gender Expansive n=434; Millennials+ n=1,773; Gen X n=1,641; Boomers n=2,295

LGBTQ AIR TRAVELERS: Among LGBTQ survey participants who took at least one flight in the past year, the vast majority are members of at least one frequent flyer program. Airline loyalty is near equally split between the major domestic carriers. Among those who belong to a frequent flyer program, 69% indicated belonging to more than one program, and 45% belong to three or more.

Frequent Flyer / Airline Rewards Programs

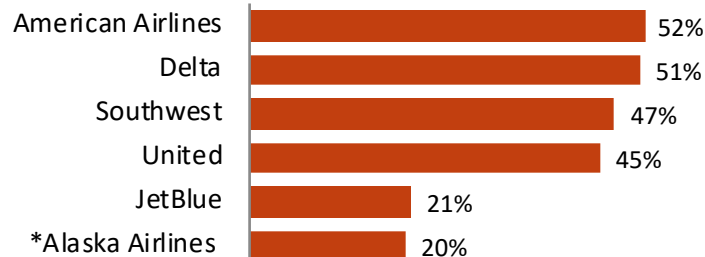
Among All LGBTQ that have taken at least one round-trip flight in the past year

78% Of those taking at least one flight belong to at least one Airline Frequent Flyer or Airlines Rewards Program

40% Hold a credit card connected to or assisting in earning miles in an Airline Frequent Flyer Program



In which Airline Frequent Flyer Programs are you a member?
Please mark all that apply.
% of those who belong to any program:



British Airways	6%	Air Canada	3%
Frontier	5%	Singapore	1%
Virgin Atlantic	5%	Qantas	1%
Lufthansa/Swiss/Austrian	3%	Other	8%

*Alaska Airlines: including acquired Virgin America

Base: All LGBTQ who have taken at least one round-trip flight in the past year n=4,444;

Those who are members of frequent flyer programs n=3,497



HOTEL LOYALTY PROGRAMS: Just over half of LGBTQ participants who spent a night in a paid accommodation in the past year belong to a hotel loyalty program. Of those, Hilton and Marriott are by far the most popular.

Hotel Loyalty Rewards Programs

Among All LGBTQs who have stayed at least one night in a hotel or any paid accommodation in the past year

54% Are members of at least one hotel loyalty rewards program



In which hotel loyalty/rewards programs are you a current member?
Please mark all that apply.
% of those who belong to any program:

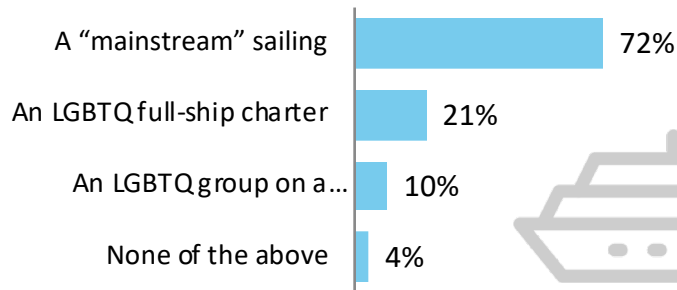
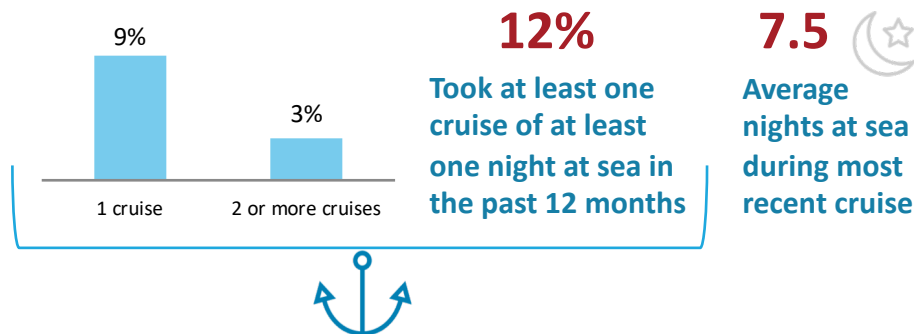


3%-8%: La Quinta Returns (8%); Omni Select Guest (5%); Radisson Rewards (5%); Preferred Hotels & Resorts / I Prefer Hotel Rewards (5%); Club Carlson (4%)

Under 3%: Le Club Accor Hotels ; Leading Hotels of the World / Leaders Club; Small Luxury Hotels of the World / INVITED; Sonesta Travel Pass; Stash Hotel Rewards

How many cruises did you take in the past 12 months, of at least one night at sea?

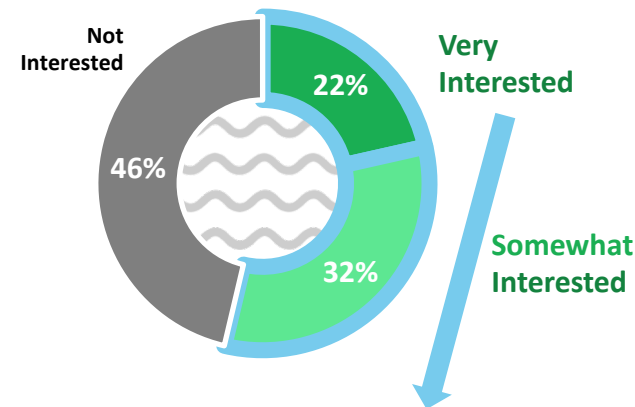
Among All LGBTQ Travelers



Base: All LGBTQ Travelers n=5,402

How interested are you in taking a cruise in the next 12 months?

Among All LGBTQ Travelers

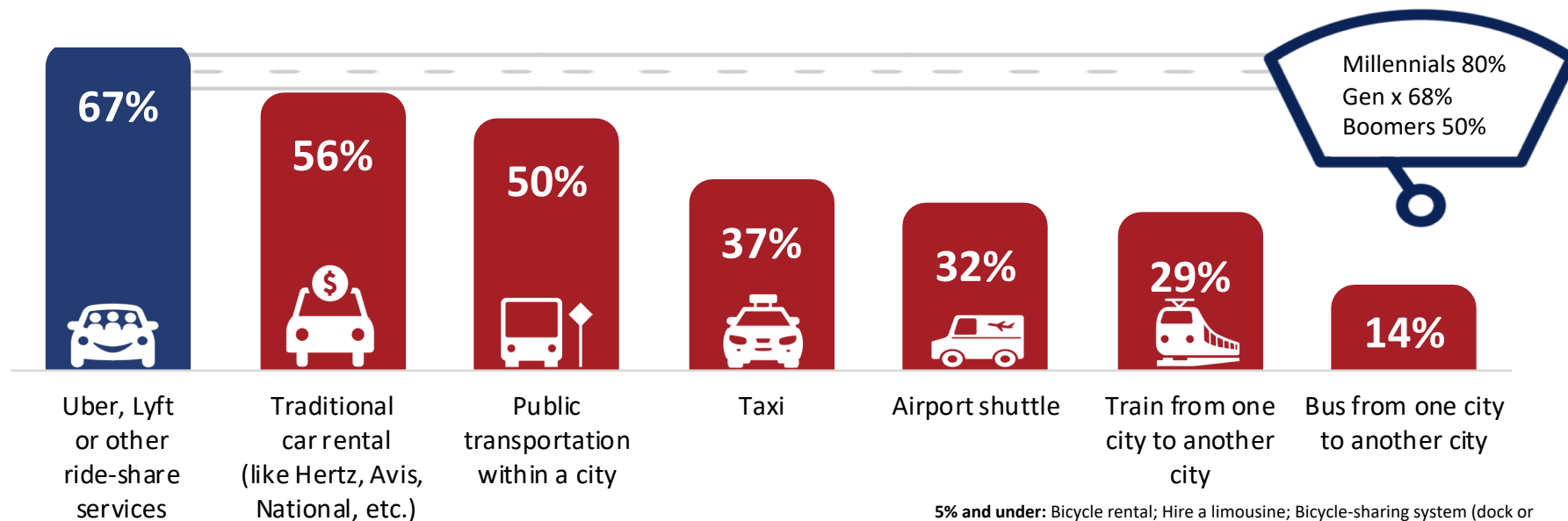


What type of cruise are you interested in taking? (Please mark all that apply over the next 12 months.)

A "mainstream" sailing	60%
An LGBTQ full-ship charter	55%
An LGBTQ group on a mainstream sailing	41%
None of the above	3%

GROUND TRANSPORTATION: The chart shows the popularity of ride-share services like Uber and Lyft while traveling, at the expense of car rental and taxi. While percentages using ride-share services are higher among Millennials, the number of LGBTQ Baby Boomers now using these services is quite high.

In the past 12 months, what types of transportation have you used/purchased when away from home on vacation?
Among All LGBTQ Travelers

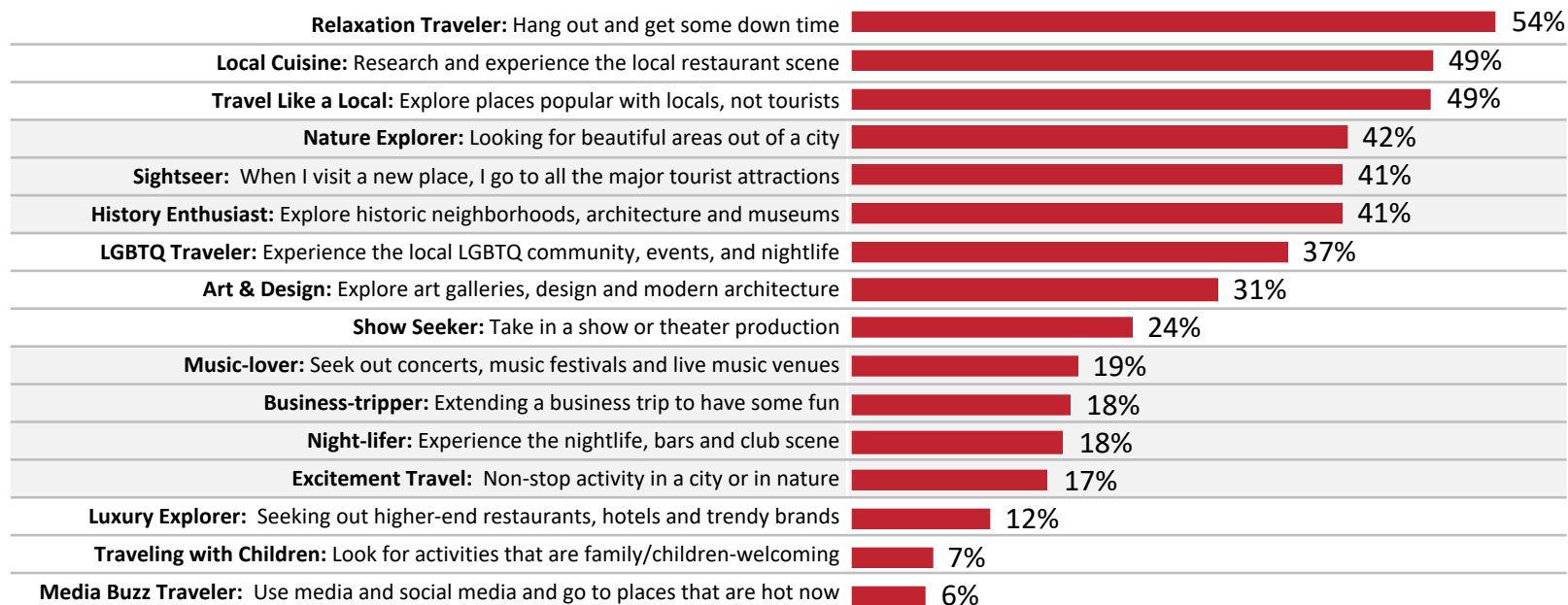


Base: Please mark all that apply question. All LGBTQ Travelers n=5,402

5% and under: Bicycle rental; Hire a limousine; Bicycle-sharing system (dock or dockless); Zipcar, Getaround or other short-term car rental program

TYPE OF TRAVELER: This question shows overall travel priorities within the LGBTQ community. However, CMI finds that in custom destination research, these percentages can vary substantially if the same question is asked about a specific destination, for example, if it is known for outdoor adventure or for theatre.

Looking only at your trips in the past year, what type of traveler do you consider yourself to be? (Please mark all that apply.)
Among All LGBTQ



TYPE OF TRAVELER BY GENDER: There are important differences when we look at these travel priorities by gender. Travel marketers must understand that L, G, B and T are not one “group” moving in one direction. For example, Nature Explorer was higher among women. LGBTQ Traveler was more important among men and gender-expansive participants. Night-lifer and Showseeker were more important for men.

Looking only at your trips in the past year, what type of traveler do you consider yourself to be? (Please mark all that apply.)

	Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary Participants
Relaxation Traveler	54%	56%	49%
Local Cuisine	49%	50%	42%
Travel Like a Local	47%	51%	44%
Nature Explorer	35%	49%	41%
Sightseer	47%	37%	28%
History Enthusiast	42%	40%	43%
LGBTQ Traveler	45%	28%	36%
Art & Design	32%	29%	32%
Show Seeker	27%	20%	19%
Music-lover	17%	21%	24%
Business-tripper	21%	16%	17%
Night-lifer	27%	9%	14%
Excitement Travel	19%	15%	10%
Luxury Explorer	15%	9%	8%
Traveling with Children	3%	11%	5%
Media Buzz Traveler	7%	6%	5%

TYPE OF TRAVELER BY GENERATION: There are also differences when we look at these travel priorities by generation. Millennials had higher percentages for Travel Like a Local, Excitement Traveler, LGBTQ Traveler and Night-lifer. Generation X had the highest business travel identity. In general, Baby Boomers underperformed on nearly all the identities.

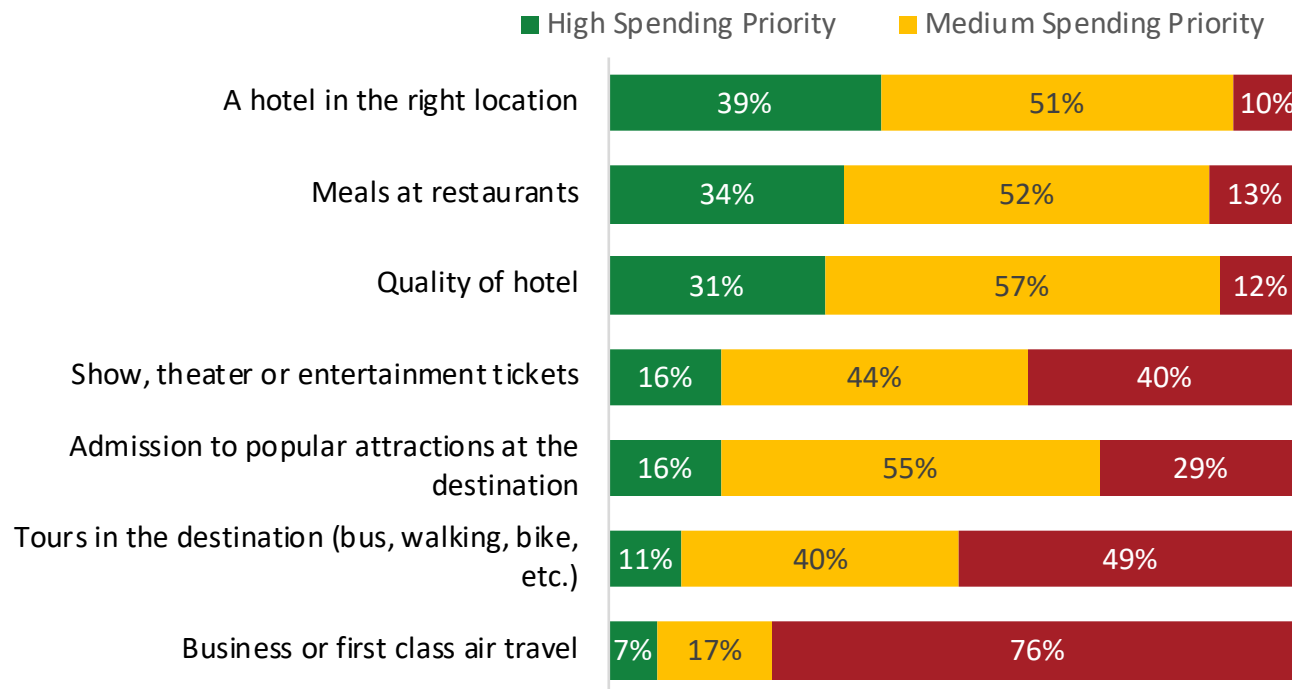
Looking only at your trips in the past year, what type of traveler do you consider yourself to be? (Please mark all that apply.)

	Millennials+	Generation X	Baby Boomers
Relaxation Traveler	55%	57%	51%
Local Cuisine	53%	49%	45%
Travel Like a Local	54%	49%	43%
Nature Explorer	46%	41%	38%
Sightseer	43%	42%	39%
History Enthusiast	41%	40%	43%
LGBTQ Traveler	42%	37%	31%
Art & Design	34%	29%	29%
Show Seeker	22%	25%	24%
Music-lover	22%	19%	17%
Business-tripper	19%	23%	13%
Night-lifer	28%	17%	9%
Excitement Travel	24%	18%	8%
Luxury Explorer	11%	14%	10%
Traveling with Children	5%	12%	4%
Media Buzz Traveler	11%	5%	3%

Base: Millennials+ n=1,769; Gen X n=1,636; Boomers n=2,286

When you travel for vacation, what are your biggest spending priorities? Or from your observations, what do you think that you spend more or less on, than the average traveler?

Among All LGBTQ Travelers



Some Demographic Differences

The response was relatively consistent across gender

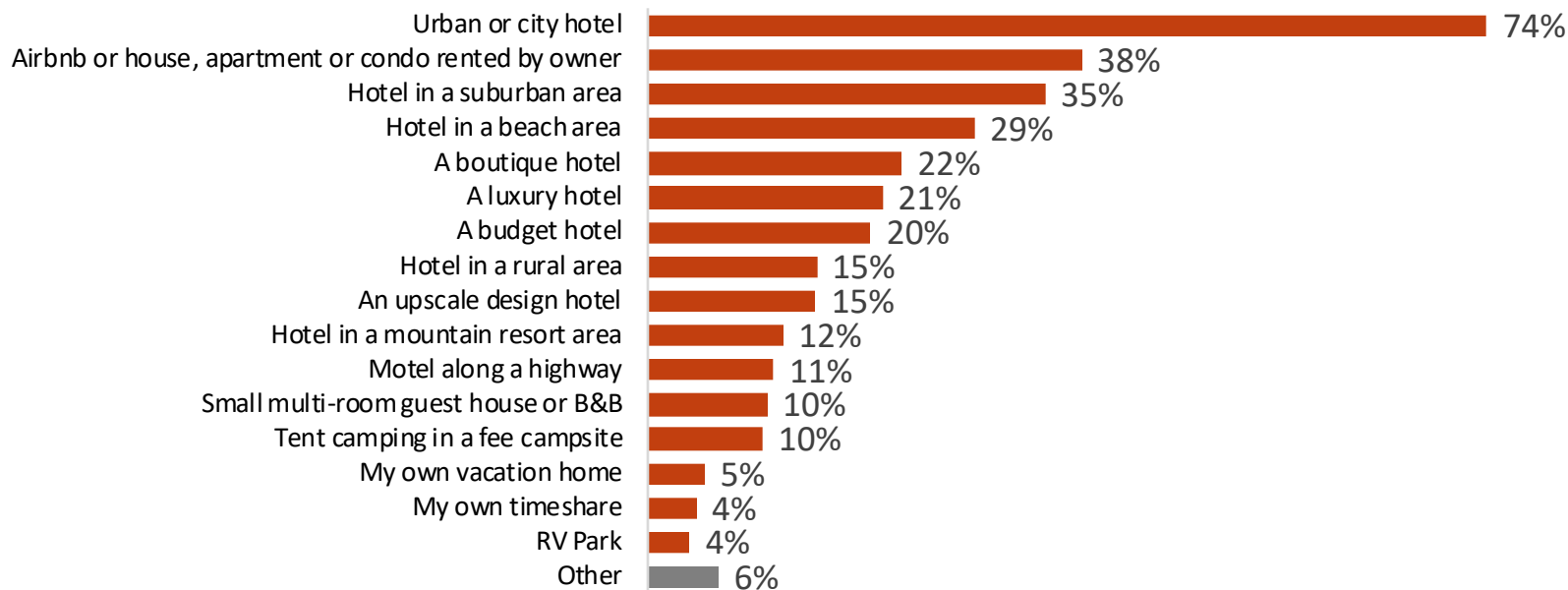
Millennials were less likely than older generations to prioritize money for hotel location and hotel quality

Spending money on meals was the top spending priority for Millennials

Baby Boomers had higher rates of spending for show tickets and tours

TYPES OF HOTELS: Gay and bisexual men had the highest urban hotel stay rate at 79% vs. 70% for lesbian and bisexual women. Men had higher rates for luxury hotels, design hotels and boutique hotels, which are more often found in cities. Lesbian and bisexual women tended to be more varied in the accommodation choices, higher for Airbnb (previous slide) and higher rates for outdoor options like camping and RVs.

In the past 12 months, in which type of hotel or paid accommodations did you stay at least one overnight?
Among All LGBTQ Travelers



I did not stay in a hotel or paid accommodation in the past 12 months. (4%)

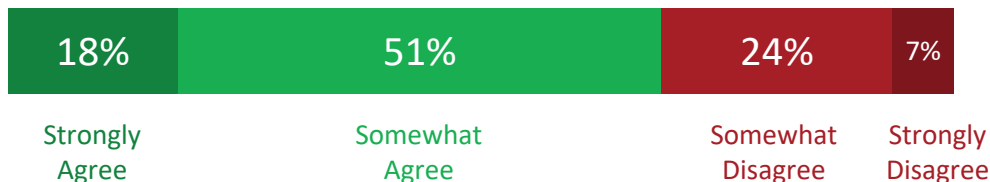
Base: All LGBTQ Travelers n=5,402

HOTELS AND LGBTQ REPUTATION: This question set shows that staying in a hotel brand that has a positive LGBTQ reputation is important. However, most LGBTQ community members feel that today most major hotel brands are LGBTQ-welcoming. This is a positive statement about the hotel industry, but it makes it more challenging for brands to distinguish themselves only through LGBTQ messages.

Do you agree or disagree with these statements about hotels?
Among All LGBTQ Travelers

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

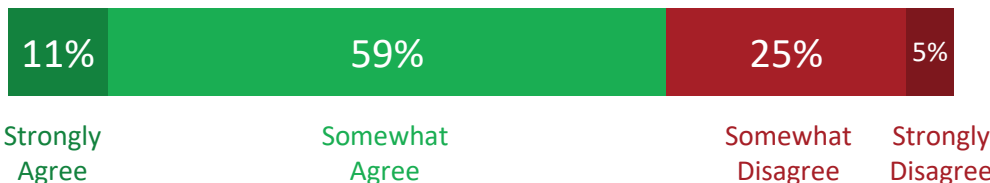
69%
Agree



31%
Disagree

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

70%
Agree



30%
Disagree

TYPES OF DESTINATIONS BY GENDER: This question demonstrates the significant differences in preferred destinations within the LGBTQ community, when broken out by gender. For example, men were more likely than women to be urban travelers and beach travelers. Women were more likely than men to be outdoor adventure travelers and mountain travelers.

Think back to all the trips you took in the past 12 months. How would you describe the destination or destinations in which you traveled to? (Please mark all that apply for the past year.)

	All LGBTQ Travelers	Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary Participants
Big city / urban destination	66%	72%	60%	61%
A destination with many historical attractions	43%	46%	41%	36%
Beach resort or community	37%	41%	35%	25%
A place know for outdoor adventure or activities	37%	32%	42%	38%
A destination known to be LGBTQ popular	36%	45%	28%	29%
A warm weather destination because it was cold at home	26%	31%	22%	16%
Mountain resort or community	22%	20%	24%	19%
Island destination	18%	21%	15%	11%
Theme park destination	11%	12%	9%	8%

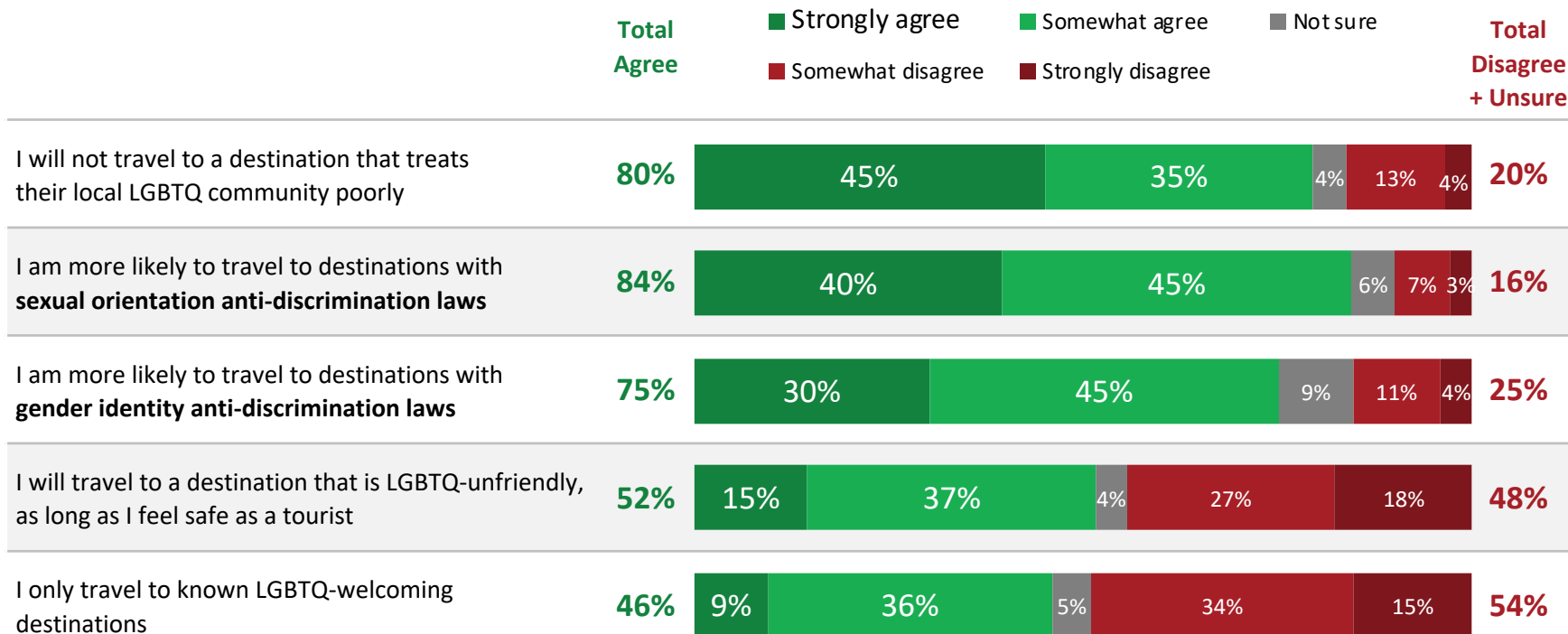
Base: All LGBTQ Travelers n=5,402;
Gay & Bi Men n=3,361; Lesbian & Bi Women n=1,644; Gender Expansive n=397

TYPES OF DESTINATIONS BY GENERATION: This question demonstrates the differences in preferred destinations within the LGBTQ community, when broken out by generation. For example, Millennials were more likely to be both urban travelers as well as outdoor travelers. Baby Boomers were least concerned about LGBTQ-popular destinations.

Think back to all the trips you took in the past 12 months. How would you describe the destination or destinations in which you traveled to? (Please mark all that apply for the past year.)

	All LGBTQ Travelers	Millennials+	Generation X	Baby Boomers
Big city / urban destination	66%	75%	66%	56%
A destination with many historical attractions	43%	43%	45%	42%
Beach resort or community	37%	32%	42%	38%
A place know for outdoor adventure or activities	37%	42%	39%	30%
A destination known to be LGBTQ popular	36%	39%	38%	32%
A warm weather destination because it was cold at home	26%	24%	28%	26%
Mountain resort or community	22%	20%	24%	22%
Island destination	18%	14%	19%	19%
Theme park destination	11%	12%	13%	7%

Do you agree or disagree with these statements about vacation destinations?
Among All LGBTQ Travelers

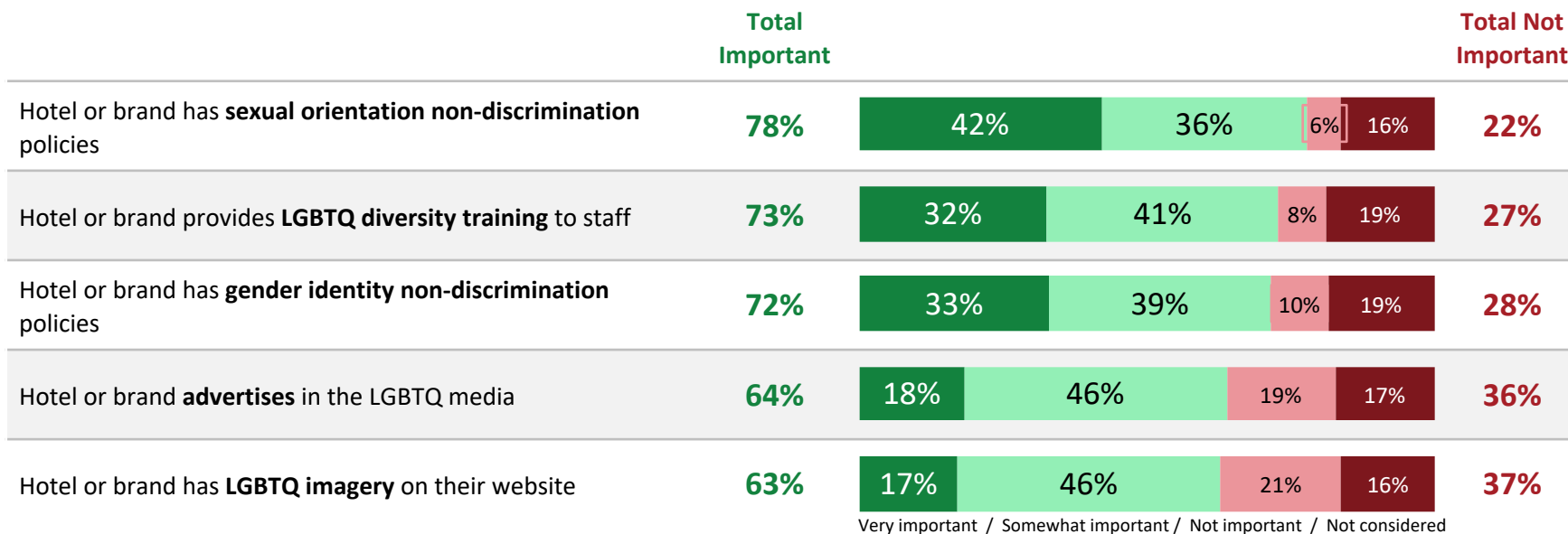


Base: All LGBTQ Travelers n=5,402

HOTELS AND LGBTQ REPUTATION: This question helps determine the programs and outreach methods that are most important for a hotel to build a positive LGBTQ-welcoming reputation. All the strategies were viewed as important, but some more than others.

Which of these programs and outreach methods are important to you, when considering booking a hotel, or joining a hotel loyalty program?

Among All LGBTQ Travelers

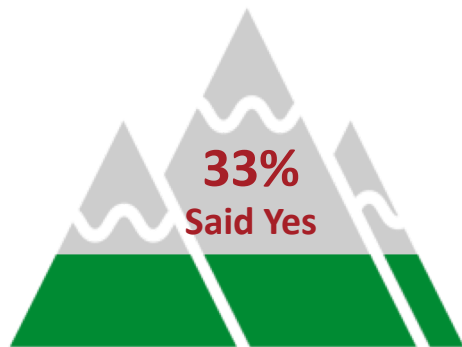


Base: All LGBTQ Travelers n=5,402

NATIONAL PARK VISITS: Calculating national park visits is difficult for many reasons. Many in the LGBTQ community live in and visit cities such as New York, Washington DC, Philadelphia and San Francisco that contain national parks and monuments, and may well visit them (but not record the visit on a question like below). LGBTQ visitation could be much higher than indicated on this question.

Visiting National Parks & Monuments Among All LGBTQ Travelers

Did you go to any national parks or monuments
in the past 12 months for a daytrip or overnight?



Write-in
exercise

Please tell us which parks you visited.

Top 12 Non-Urban national parks % of those who indicated yes

Grand Canyon National Park	7%
Yosemite National Park	7%
Joshua Tree National Park	6%
Rocky Mountain National Park	5%
Zion National Park	4%
Great Smokey Mountains National Park	4%
Yellowstone National Park	4%
Acadia National Park	3%
Olympic National Park	3%
Shenandoah National Park	3%
Arches National Park	3%
Mount Rainier National Park	3%

Base: All LGBTQ Travelers n=5,402.

Urban parks did receive many mentions but not included in the write-in calculation.

