



# IGLTA

ADVANCING  
LGBTQ+ TRAVEL



# CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992



- San Francisco-based with global clients; founded in 1992.
- 100% LGBTQ-owned and -operated; NGLCC-Certified supplier.
- 28+ years of consumer research, CMI has conducted hundreds of LGBTQ research projects across many industries
- Dedicated research panel of 50,000+ LGBTQ consumers in North America
- Online surveys, focus groups, virtual focus groups, in-depth interviews, intercepts and other methodologies
- Serves corporate, university, organization and government institution clients throughout the USA, Canada and around the world

# **An Orientation to the LGBTQ segment**





# There is No Singular “LGBTQ+” Traveler



These people  
are **NOT** the  
same  
travelers

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

# The LGBTQ Community is becoming more DIVERSE over time

Gay & Lesbian



GLBT



LGBT



LGBTQ



LGBTQ+

LGBTQIA+

LGBTQ2+



???

- Lesbian
- Gay Woman
- Gay Man
- Bisexual
- Pansexual
- Asexual
- Same Gender Loving
- Heterosexual | Straight Man
- Heterosexual | Straight Woman
- Questioning
- Other: Please tell us
- Female
- Male
- Cisgender
- Trans Woman
- Trans Man
- Transgender
- Intersex
- Non-binary
- Genderqueer
- Gender Fluid
- Agender
- Gender Non-conforming
- Questioning
- Queer
- Straight Ally
- Other: Please tell us

# Language matters in the LGBTQ Community

## Let's talk about some terms

**OK**

LGBT, LGBTQ, LGBTQ+, LGBTI (and the many variations)  
Sexual orientation, gender identity, LGBTQ=friendly, marriage equality

**NOT OK**

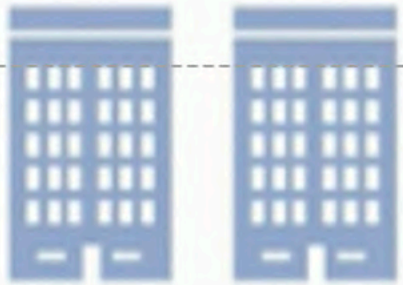
GLBT, sexual preference, preferred pronouns, alternative lifestyle,  
your friend, those people, that market,  
Transgendered, homosexual, “gay marriage”, “born female”

**CAUTION**

Queer, Lifestyle  
Take care in use of pronouns and gender binary language  
Gay neighbourhood, gay-friendly and overuse of the word “gay” in materials

# **LGBTQ People Live in All Types of Communities**

## **Big City Urban LGBTQ is a Minority of the LGBTQ Community**



**Big or medium size  
city / urban area**

**35%**  
of all LGBT participants



**Suburb of a big or  
medium size city**

**30%**  
of all LGBT participants



**Smaller Communities  
rural, towns, small cities**

**35%**  
of all LGBT participants

# Demographic Ways the the LGBTQ Community is Different...

## To Non-LGBTQ People

(this may present an opportunity for some products/services... and a challenge for others)

The LGBTQ community is more likely to be single, not living with a partner  
Especially gay men, and even more so for younger gay men

The LGBTQ community trends younger  
The LGBTQ Gen X market is stronger than Gen Pop

Overall, LGBTQ's are less likely to be parents (although this is changing)

The LGBTQ community is more mobile  
Far less likely to live where they grew up

The LGBTQ community may be better educated (but that stat is complicated)

Evaluating LGBTQ household income is also complex



DIVERSITY

INCLUSIVITY

LIFE

HEALING

SUNLIGHT

NATURE

HARMONY

SPIRIT



## Trends in the Market



# LGBTQ Travelers

know how to  
live/travel safely in  
the face of viruses  
and other threats

- Decades of experience travelling with the threat of HIV
- Understand risk mitigation for the good of all
- To travel safely is in our DNA
  - Concerns about criminalization due to sexuality
  - Loss of rights when crossing borders
  - Trans travellers heightened risks anytime in public spaces
- Travel in the face of risk
- Ready to Go!



### Protection against discrimination based on sexual orientation

Constitutional Protection	11	Broad Protection	56	Employment Protection	78	Limited/Uneven Protection	7	No Prot. / No Crim.	55
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### Legal recognition of families

-  Marriage or other forms of legal union for same-sex couples
-  Adoption open to same-sex couples (either jointly or via second parent adoption)

### Criminalisation of consensual same-sex sexual acts between adults

De Facto Criminalisation	2	Up to 8 Years Imprisonment	30	10 Years to Life in Prison	26	Death Penalty	6 (6 Possible)
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### Legal barriers to the exercise of rights

-  Legal barriers to freedom of expression on SOGIESC issues
-  Legal barriers to the registration or operation of sexual orientation related CSOs

DECEMBER 2019



CMI's 14th Annual LGBTQ Community Survey® • June 2020  
Among All LGBTQ Participants

***“Corporations that support LGBTQ equality  
are more important than ever.”***



**85% Agree**

**13% Neutral**

**2% Disagree**

CMI's 14th Annual LGBTQ Community Survey® • June 2020  
Among All LGBTQ Participants

***“I tend to purchase from companies that market to and support the LGBTQ community.”***



**72% Agree**

**25% Neutral**

**3% Disagree**

***“Pride events are important to our community.”***



**82% Agree**

**15% Neutral**

**3% Disagree**



**Buying Power in the USA  
alone:**

**US \$ 1 Trillion**

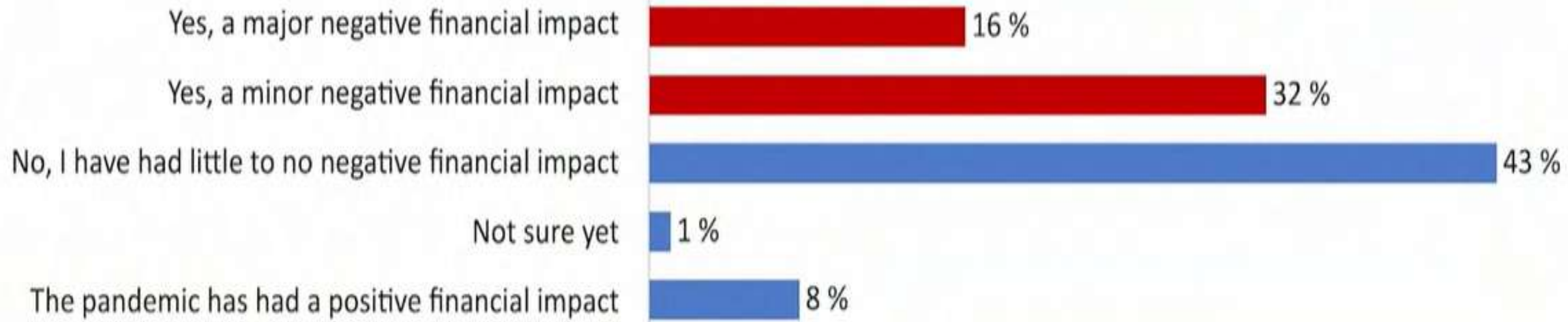


## Financial Impact of COVID-19

October 2020

Has the COVID-19 pandemic had a financial impact on you, to date?

All LGBTQ Participants



### Financial Trends in USA

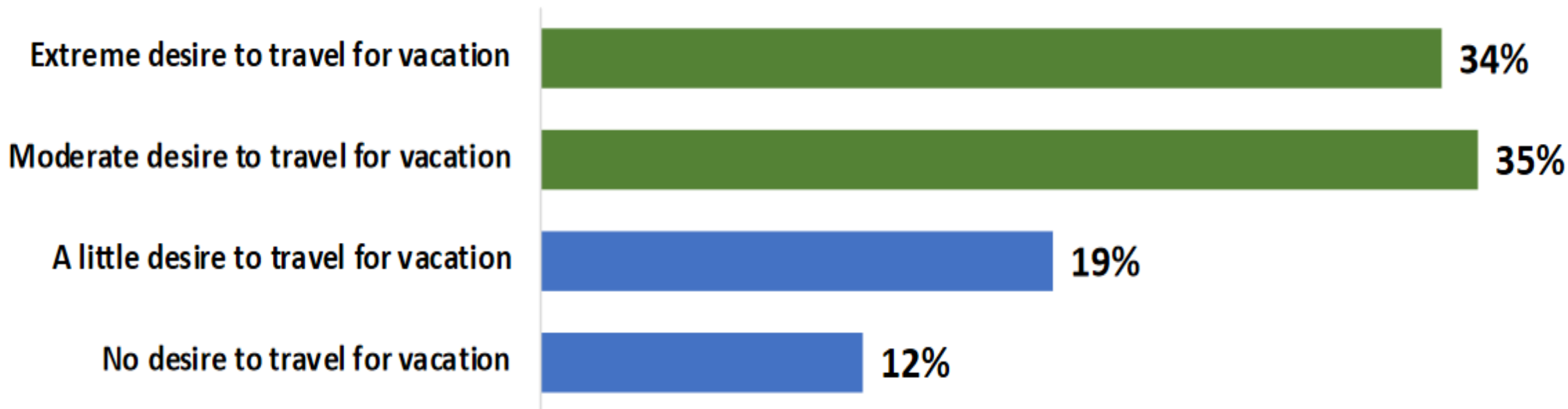
- Financial impact is NOT universal. Some are doing better, some worse, some about the same
- Higher unemployment / But many with jobs are making more money
- Investments going through wide negative and then positive swings
- Higher inflation, especially in housing
- Increased savings / decreased consumer confidence



# COVID-19: Desire to Travel Again

- 69% of all LGBTQ participants indicated an extreme or moderate desire to travel again for vacation
- Only 12% said that they had no desire to travel for vacation





How “pent-up” is your desire to travel for a vacation?  
All LGBTQ



# VACATION MOTIVATIONS

## “LGBTQ WELCOMING” IS VERY IMPORTANT

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

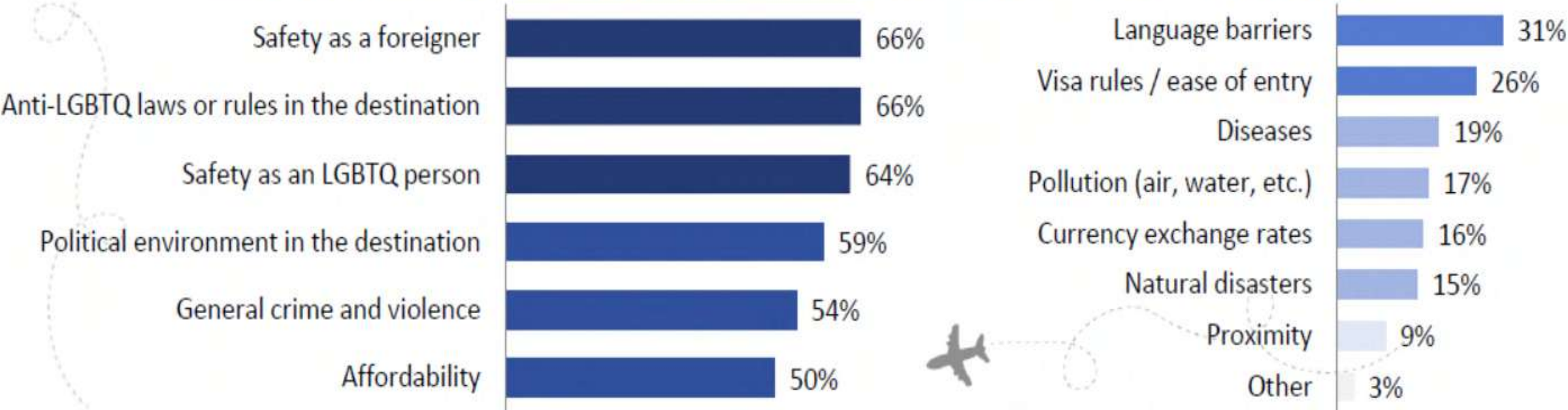
Selected 5 Very Important or 4 Important on the 5-point Scale		Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary Participants	Millennials+	Generation X	Baby Boomers
	Destination is LGBTQ-friendly	80%	81%	79%	82%	81%	78%
	Destination is an LGBTQ hotspot	37%	23%	35%	34%	31%	26%
	Destination offers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

**INTERNATIONAL TRAVEL:** When asked about concerns when selecting an international travel destination, participants expressed mostly safety-related concerns as an LGBTQ individual as well as a foreigner. Political environment in the destination also has a influence in destination selection. Concerns such as language, natural disasters and currency rates were not large barriers to LGBTQ international travel.

## INTERNATIONAL TRAVEL

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

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





**DESTINATION ATTRIBUTES:** Scenic or natural beauty is the No. 1 destination attribute that LGBTQ travelers are looking for (60%), followed by LGBTQ friendliness (45%). Women (69%) and Baby Boomers (68%) trend higher for scenic/natural beauty, while men (50%) prefer known LGBTQ-friendly destinations. Millennials (43%) are most likely to enjoy food and restaurant offerings.

DESTINATION SELECTION

Of those listed, what are the top three attributes you look for when picking a destination for vacation?

Among all LGBTQs who spent at least one night in a paid accommodation in the past year:

DESTINATION ATTRIBUTES	All LGBTQ	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Boomers
Known for its scenic or natural beauty	60%	51%	69%	54%	59%	68%
Known to be LGBTQ-friendly	45%	50%	38%	44%	48%	42%
Known for its food and restaurants	37%	36%	37%	43%	36%	31%
Known as a relaxing place	37%	31%	42%	33%	41%	36%
Known for its arts and culture	34%	34%	34%	32%	30%	39%
Has diversity of people and cultures	32%	29%	33%	31%	30%	34%
Known as an exciting place	30%	35%	25%	40%	28%	21%
Known for its architecture	17%	23%	12%	16%	18%	18%
None of the above	1%	2%	1%	2%	1%	2%



**DESTINATION ACTIVITIES:** Interesting and unique tourist attractions, historic attractions and interesting neighborhoods are the top destination activities that LGBTQ travelers look for. Outdoor activities are important for women (46%), while men (44%) are seeking out LGBTQ-specific activities. Of interest is that LGBTQ-friendly reputation was the #2 attribute for destination selection, but among activities, LGBTQ dropped to the #5 rank on this question.

DESTINATION SELECTION

Of those listed, what are the top three activities you look for when picking a destination for vacation?

Among all LGBTQs who spent at least one night in a paid accommodation in the past year:

DESTINATION ACTIVITIES	All LGBTQ	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Boomers
Interesting and unique tourist attractions	63%	62%	65%	61%	65%	64%
Historical attractions	48%	49%	47%	43%	44%	56%
Interesting neighborhoods the city is known for	41%	42%	41%	42%	43%	39%
Outdoor activities (like hiking and biking)	38%	29%	46%	43%	40%	32%
Has LGBTQ-specific activities, nightlife or neighborhood	35%	44%	24%	38%	38%	27%
Art museums or local arts scene	27%	25%	30%	27%	23%	32%
Theater, concert or cultural performances	23%	24%	23%	23%	24%	24%
Unique or luxury shopping	8%	10%	7%	9%	9%	7%
None of the above	2%	2%	2%	2%	2%	3%



**HOTEL SELECTION:** Hotel location and value ranked as top motivators in LGBTQ travelers’ hotel selection process, followed by low price and LGBTQ-friendly reputation. CMI has been tracking this trend for years, and LGBTQ-friendly ranking remained 4<sup>th</sup>, even with the changed political environment in the United States.

**HOTEL SELECTION**

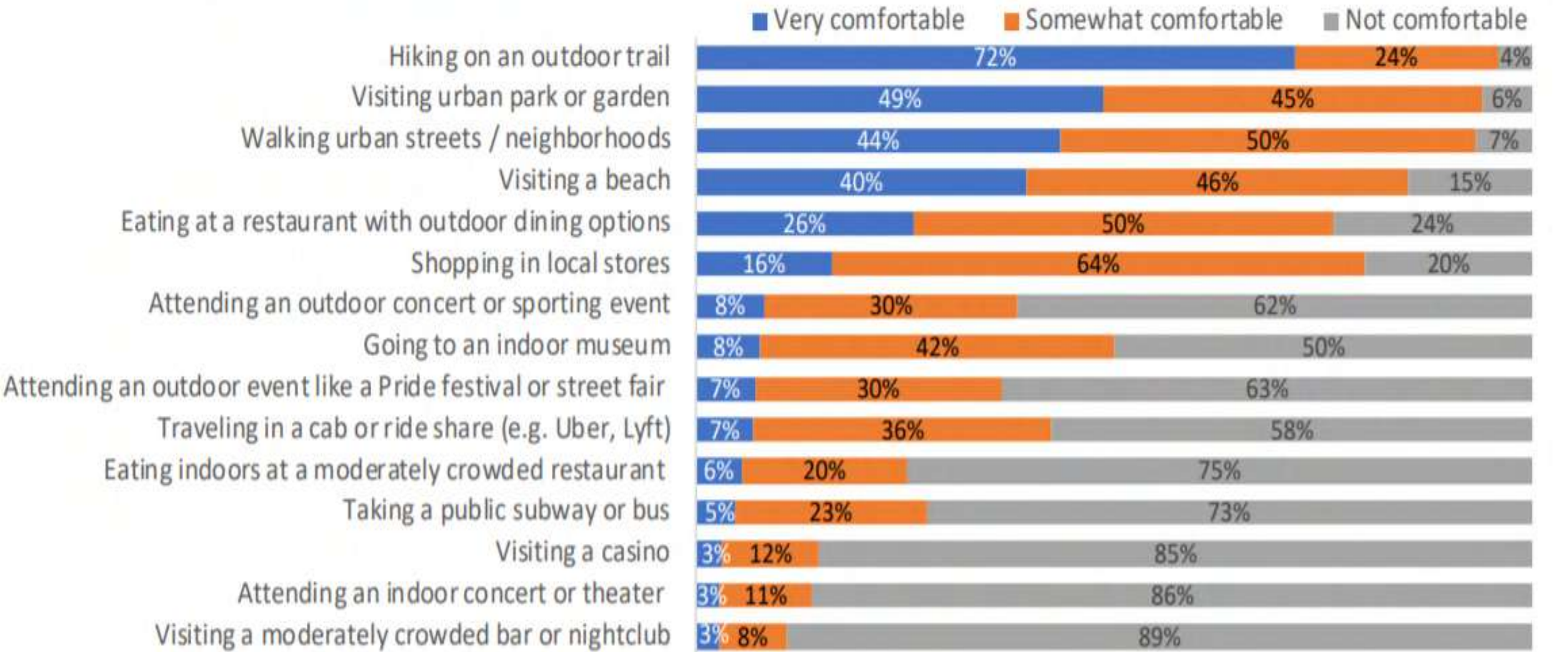
When you shop for hotels, how would you rank the following motivators in your selection process? (Please drag and rank.)

		Avg. Ranking
	Location of hotel in destination	2.0
	Value of price for hotel quality	2.1
	Low Price	3.4
	LGBTQ-friendly reputation	3.4
	Hotel customer loyalty program	4.0



**Activities While Traveling on Vacation:** For the near future, LGBTQ travelers feel most safe and comfortable participating in activities in outdoor spaces and without crowds. These types of activities are available in all destinations, including big cities. Compared to May, the comfort level for outdoor activities has increased, while the comfort level for indoor activities has remained consistently low.

**Right now, how safe and comfortable do you feel participating in these types of activities while traveling on vacation?**





**Post-Coronavirus:**  
**Travel industry education, partnerships and collective action won't  
just be desirable, it will be essential**




The image features two hands, palms facing each other, with fingers spread. Each finger is painted with the colors of the rainbow flag: red at the tip, followed by orange, yellow, green, and blue at the base. The hands are positioned against a light blue background with a subtle gradient. The text is overlaid on the lower half of the image, centered between the hands.

Greater **LGBT+** visibility  
is advancing acceptance  
around the world



Greater visibility has created a bigger movement of allies among friends and family...





**Diversity matters in every sense. LGBTQ travelers (especially the young) want to know what you are doing to advance it.**



# Marketing Tips & Strategies



“Engaging with the LGBTQ traveller should, in essence be about creating a **safe and welcoming environment**, and **communicating** this with **understanding and respect**”

- European Travel Commission,  
Handbook on LGBTQ Tourism in Europe, 2018



# LGBTQ Travelers should be part of your core strategy because they will...

1

Be amongst the  
first to travel

2

Help bring other  
travelers back

3

Help create  
relevant social  
media content

4

Get a buzz going

**Every 10 years:**

**LGBTQ to the rescue!**

9/11/01

Great recession (2008 / 2009 / 2010)

Pandemic (2020 / 2021)

***Every 10 years!***



# Top 10 Marketing Practices

1. Sustained Effort
2. Hire an Expert
3. Understand the needs & behaviours of the segment. Be cautious of: “everyone is welcome”
4. Understand your products strengths & weaknesses
5. Marketing Basics! (Market segmentation > target markets > positioning > marketing plan. Go to market with the right product for the right segment at the right time. Consider a media mix)
6. Develop content / social / communications strategies
7. Don't go it alone (work with LGBTQ business leaders)
8. Get buy in from the top (avoid the “gay guy's project” and losing institutional knowledge and continuity)
9. You invite them and they “may” come (internal training; partner training; customer-facing training)
10. Pro Tip: Avoid focusing solely on ad hoc Pride events. Pride is a tactic, not a strategy

**KNOW THE MARKET**

**Join Associations such as IGLTA**

**Research: industry events & seminars**

**Staff Training such as All Stay**

**Listen & Learn**

**Be Sincere**

**Support the Community: Employees, Businesses, Community**





# MOST DESTINATIONS DO NOT NEED TO OVERPLAY THEIR LGBTQ CARD....

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%









**#LOVEISLOVE**  
ZÉRÓ CUKOR ZÉRÓ ELŐÍTÉLET

**#LOVEISLOVE**

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ZÉRÓ ELŐÍTÉLET



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ZÉRÓ CUKOR ZÉRÓ ELŐÍTÉLET

# Know

you're ready for this chapter  
and the next.



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# COME OUT SHARING.



The fight for equality is far from over. Whatever you do, however you do it, it's time to come out in support of LGBT. Join us #ComeOutForLGBT



# CAN BOTH OUR MOTHERS WALK US DOWN THE AISLE?

Ben & Adam, Provincetown, MA

*Long's*  
Fine Jewelers Since 1878

Traditions are what you make them. From  
rings to proposals, Long's is here to help.

Helping You Get It Right.com

Photo © 2013 Eileen Counihan

*Long's*  
Fine Jewelers Since 1878

Julie & Paula, Stoneham, MA

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rings to proposals, Long's is here to help.

Helping You Get It Right.com

Photo © 2013 Christine M. Hurley



# *The Blue Lagoon Island Beach Resort*



*Enjoy your happy day with us!*



# Why your destination? Let's chat about it ...

1. What are your top non-LGBTQ tourism assets that are a good fit for the LGBTQ community?
2. What are your top LGBTQ-specific tourism assets?
3. Are there potential barriers for LGBTQ travel to your destination?





# IGLTA

ADVANCING  
LGBTQ+ TRAVEL