

24th Annual LGBTQ Tourism & Hospitality Survey



ABOUT CMI

25+ YEARS OF LGBTQ INSIGHTS



- › Community Marketing & Insights (CMI) has been conducting LGBTQ consumer research 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 bisexual men, 1,535 lesbian and bisexual women, and 479 transgender and gender-expansive 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 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+ (1981-2000) 33%, Generation X (1965-1980) 33%, Baby Boomers (1946-1964) 33%; gay and bisexual men 47%, lesbian and bisexual 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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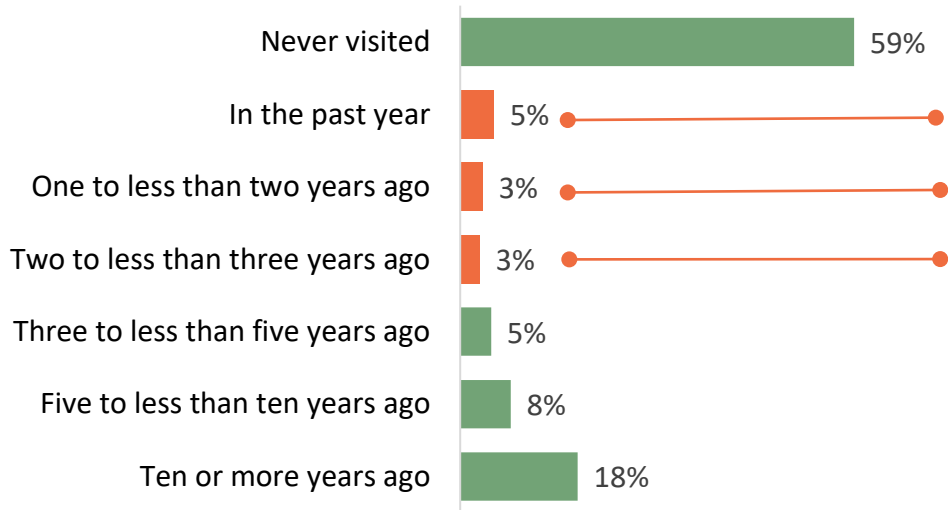
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Sponsored Questions

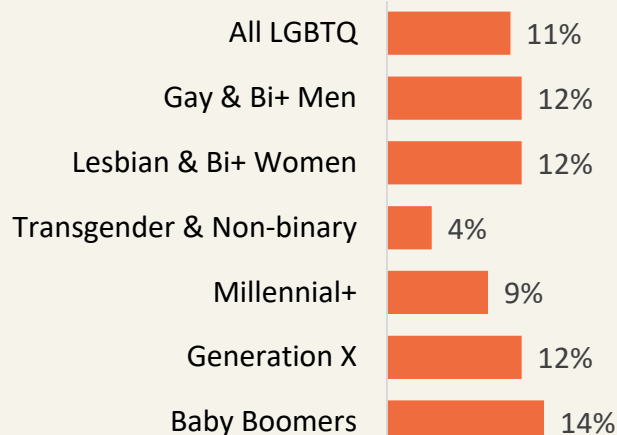


Hawai'i Visitation: Most LGBTQ study participants have never visited Hawai'i before. Reviewing for past three-year visitation, 11% of all LGBTQ participants visited Hawai'i, about equal for men and women. Visitation is stronger among older participants.

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

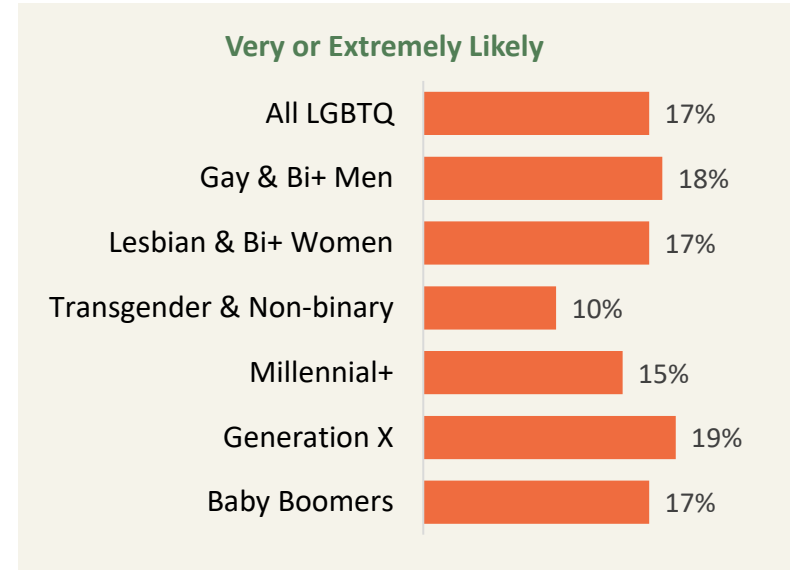
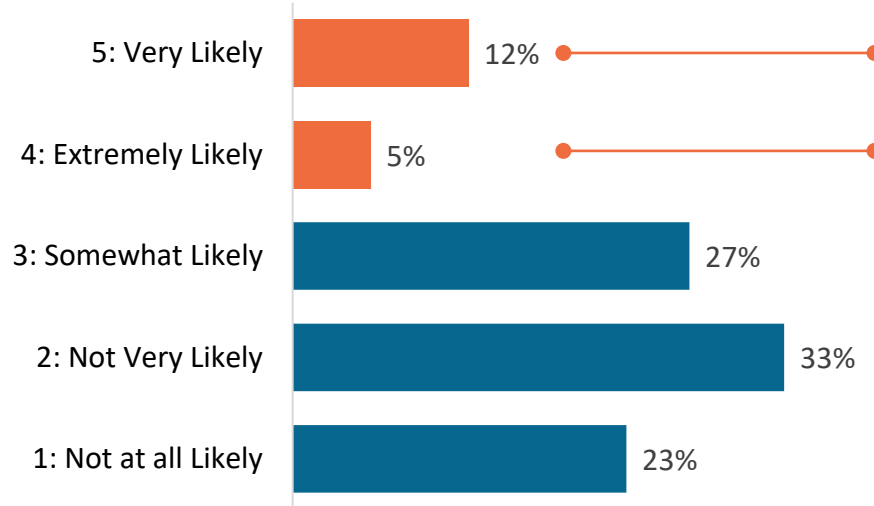


Past Three Year Visitation



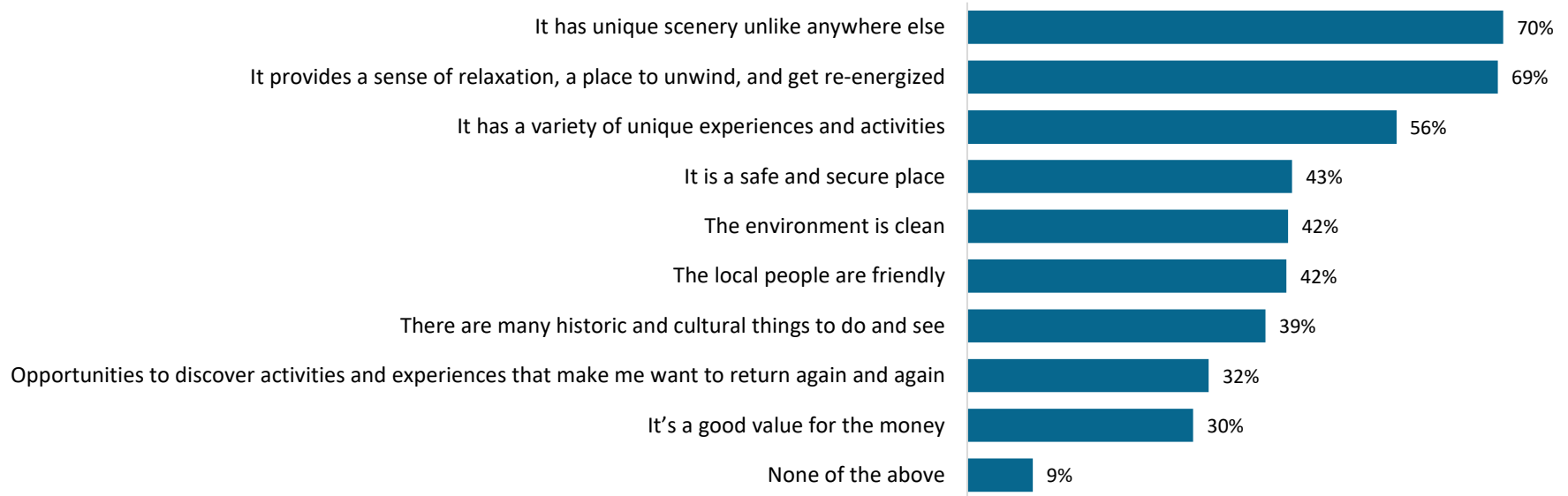
Hawai'i Future Visitation: 17% of participants indicated that they are very or extremely likely to visit Hawaii in the next 2 years. Again, men and women are about equal. By age, Generation X had the strongest favorable response.

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



Important Hawai'i Attributes: Unique scenery and a chance to relax were the two most important attributes considered to select Hawai'i. Next was a variety of unique experiences.

**When thinking about a vacation to Hawai'i, how important are the following attributes? Please check all that apply.
Among All LGBTQ**



Attitudes About Hawai'i Visitation

Below are some attitudes regarding travel to Hawai'i. On the 5-point scale, please tell us how much you personally agree or disagree with these statements about Hawai'i, regardless of whether you have visited before or not.

	5: Strongly Agree	4	3	2	1: Strongly Disagree
Has unique scenery unlike anywhere else	64%	24%	10%	1%	1%
Provides a sense of relaxation and to re-energized	50%	33%	15%	1%	1%
Has a variety of unique experiences and activities	43%	36%	18%	2%	0.5%
Hawai'i is romantic	38%	34%	24%	3%	1%
Has many historic and cultural things to see	32%	37%	26%	5%	1%
Offers quality culinary and dining experiences	26%	36%	33%	3%	1%
The local people are friendly in Hawai'i	25%	37%	34%	3%	1%
A safe and secure place	18%	36%	41%	3%	1%
A good place for family and children	21%	29%	42%	4%	3%
A place to return again and again	21%	25%	39%	11%	5%
I prefer other destinations that are closer	22%	22%	30%	15%	11%
A great LGBTQ vacation destination	10%	21%	58%	8%	2%
A fun place for singles	11%	17%	58%	10%	4%
A good value for the money	5%	11%	39%	31%	14%
It's easy to meet other LGBTQ people in Hawai'i	5%	10%	67%	14%	4%

Attitudes About Hawai'i Visitation by Demographic

Below are some attitudes regarding travel to Hawai'i. On the 5-point scale, please tell us how much you personally agree or disagree with these statements about Hawai'i, regardless of whether you have visited before or not.

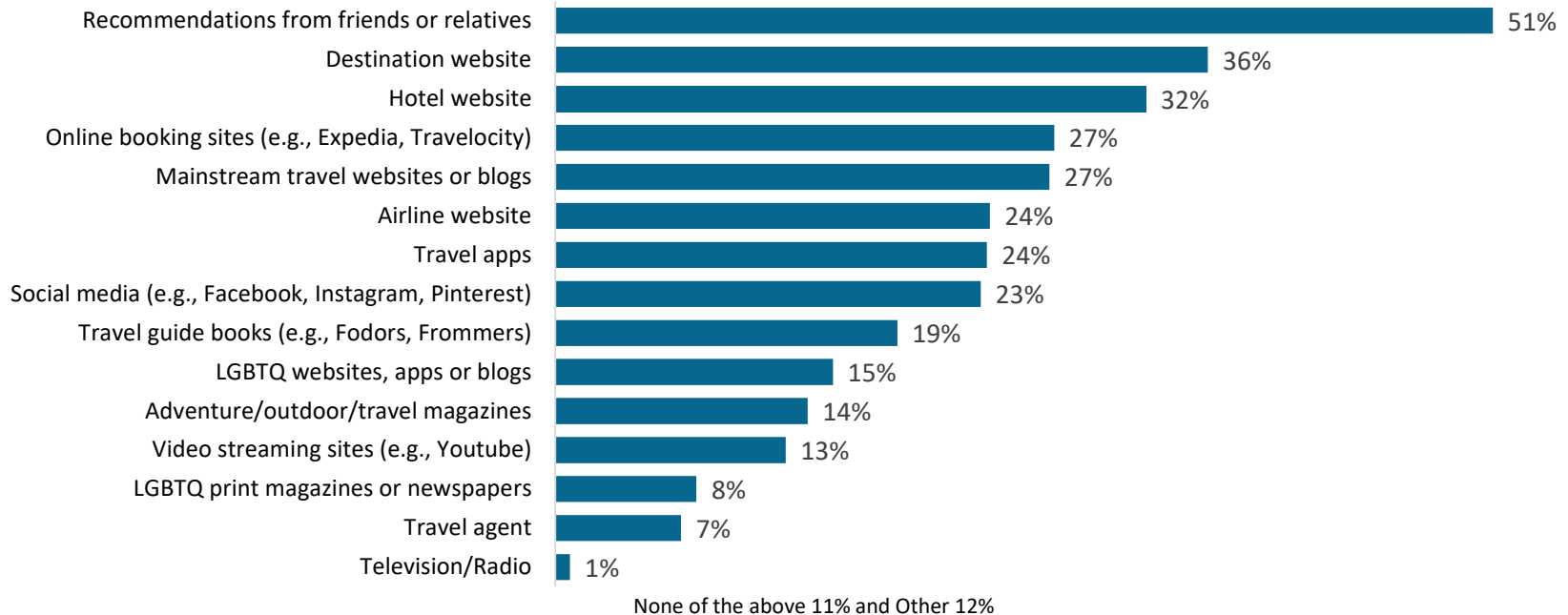
Indicated 5: Strongly Agree or 4	All LGBTQ	Gay & Bi+ Men	Lesbian & Bi+ Women	Transgender & Non-binary	Millennial+	Generation X	Baby Boomers
Has unique scenery unlike anywhere else	88%	85%	92%	85%	88%	90%	86%
Provides a sense of relaxation and to re-energized	83%	81%	86%	74%	87%	84%	78%
Has a variety of unique experiences and activities	79%	75%	84%	77%	81%	79%	78%
Hawai'i is romantic	72%	70%	75%	60%	75%	67%	72%
Has many historic and cultural things to see	69%	63%	75%	71%	70%	69%	69%
Offers quality culinary and dining experiences	62%	59%	67%	58%	63%	63%	61%
The local people are friendly in Hawai'i	62%	60%	65%	52%	61%	62%	61%
A safe and secure place	55%	59%	53%	38%	56%	55%	53%
A good place for family and children	51%	50%	53%	40%	58%	49%	45%
A place to return again and again	45%	44%	48%	33%	46%	47%	43%
I prefer other destinations that are closer	44%	45%	42%	54%	47%	41%	44%
A great LGBTQ vacation destination	31%	33%	31%	26%	28%	33%	33%
A fun place for singles	28%	31%	25%	27%	29%	27%	27%
A good value for the money	16%	17%	16%	15%	16%	15%	17%
It's easy to meet other LGBTQ people in Hawai'i	15%	19%	11%	13%	13%	16%	17%

Base: All LGBTQ vary from n=4,910 to 4,938

Researching Hawai'i

In the past 2 years, which of the following sources did you use to research your trip to Hawai'i? Please mark all that apply.

Conditionally Shown to Hawai'i Visitors in the Past 2 Years



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General Survey Questions

*Not specifically about Hawai'i,
but relevant to this report.*



GENERAL VACATION MOTIVATIONS: Compared to all the LGBTQ participants, Hawai'i visitors were similar in their vacation motivations to any destination. Hawai'i visitors were more likely to be motivated by exploring someplace new and learning about other cultures. Rest and relaxation was also a key motivator for the Hawai'i visitor.

What motivates you to take vacations?

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

	All LGBTQ Participants	Hawai'i Visitors Only
To rest and relax	73%	75%
To get away from my typical everyday life	69%	65%
To explore someplace new	69%	75%
To return to a place that I know and enjoy	53%	54%
To experience and learn about other cultures	47%	59%
To celebrate or mark a special occasion	44%	47%
To restore work/life balance	44%	42%
To seek adventure	42%	45%
To feel alive and energetic	37%	38%
To splurge on myself or on my family/friends	35%	37%
To engage in a personal passion, activity or hobby	33%	34%
To see for myself the authentic things I have read or heard about	30%	38%
To celebrate or explore LGBTQ community or life	25%	24%

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. Hawai'i visitors and all LGBTQ participants had similar responses.

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.

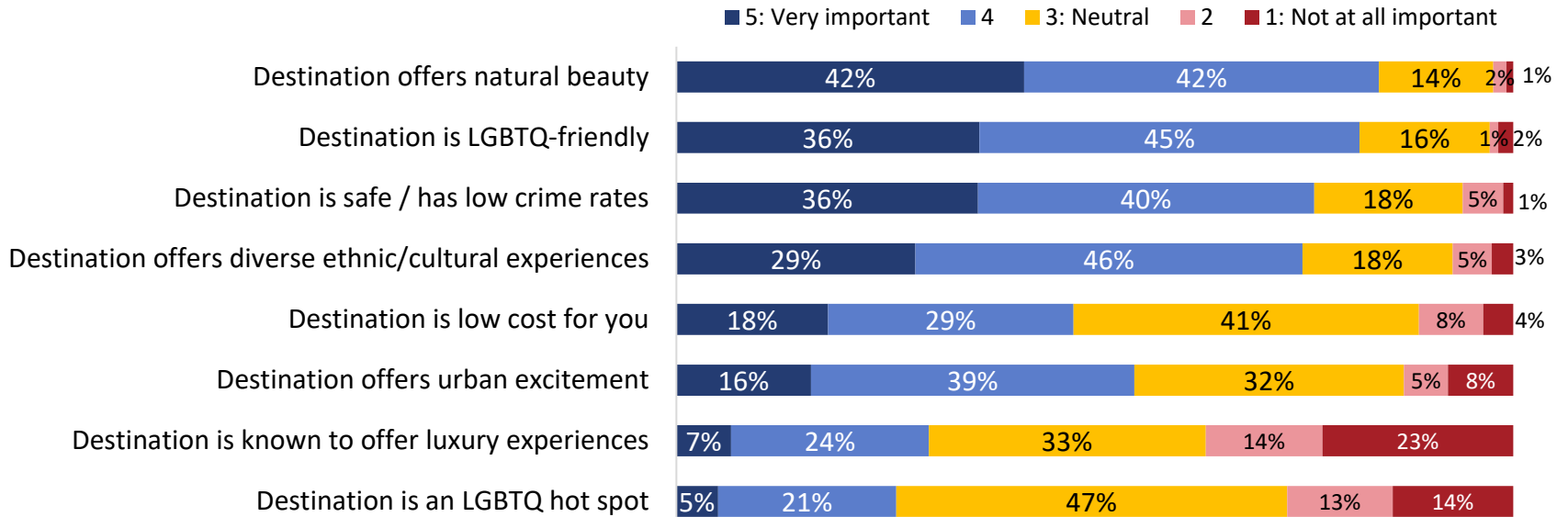
	All LGBTQ Participants	Hawai'i Visitors Only
Just to have fun or bring joy to my life	87%	90%
To clear my head, heal or emotionally replenish myself	53%	49%
To connect with my partner or spouse	43%	49%
To connect with one or more friends	32%	33%
To connect with a parent, sibling or other family members	24%	21%
To reconnect with personal goals or interests	23%	24%
To sexually connect with locals at the destination	10%	11%
To connect with my children	8%	8%
None of the above apply for my travel	1%	0.5%



Base: All LGBTQ Travelers n=4,920; LGBTQ visitors to Hawaii in past three years n=567

KEY ATTRIBUTES FOR LGBTQ DESTINATION SELECTION: Hawai'i visitors are most interested in natural beauty when selecting a destination. While the destination must be LGBTQ-friendly, it does not need to be an LGBTQ hotspot. Safety and diversity are also important to the LGBTQ community.

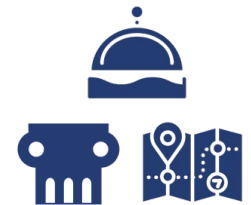
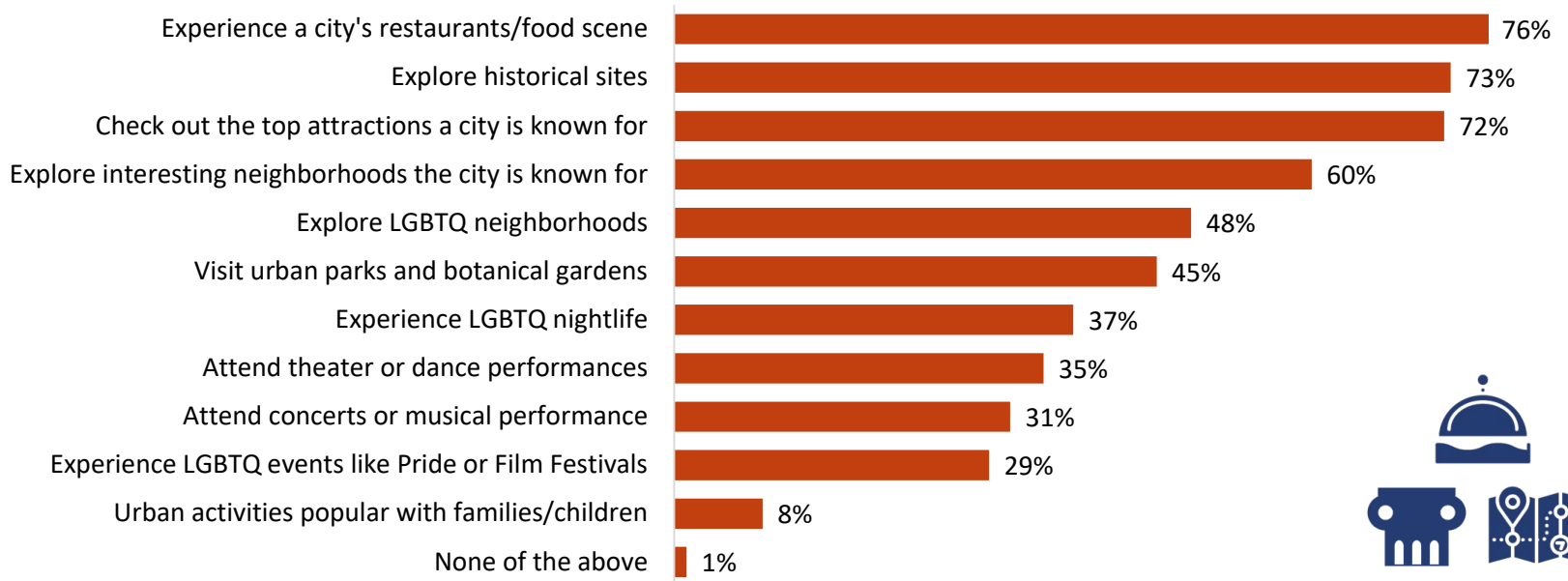
**On a 5-point scale, how important are the following, in your vacation destination selection process?
Among Hawai'i Past 3 Year Visitors**



Base: LGBTQ visitors to Hawaii in past three years n=567

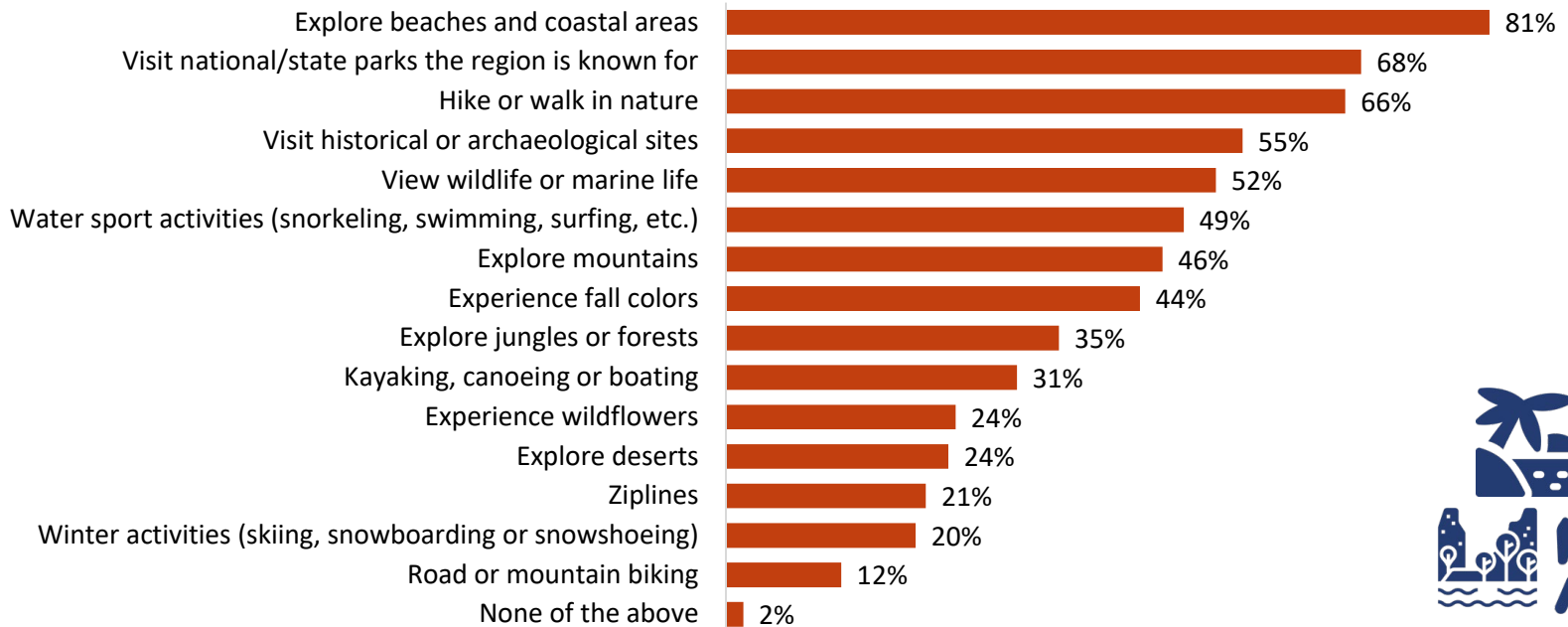
GENERAL URBAN TRAVEL MOTIVATIONS: Hawai'i visitors are most interested in any city's food scene, followed by historical sites and a city's top attractions. Interesting and LGBTQ neighborhoods were also important.

**When you think of a vacation to an urban destination, what activities attract you the most? Please mark all that apply.
Among Hawai'i Past 3 Year Visitors**



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

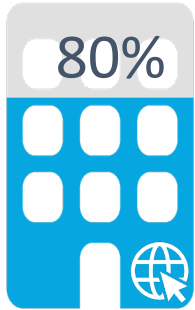
**When you think of outdoor or natural-based vacations, what activities attract you the most? Please mark all that apply.
Among Hawai'i Past 3 Year Visitors**



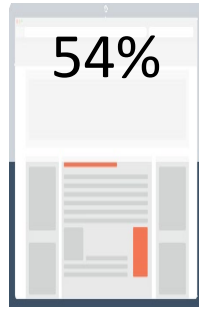
BOOKING HOTELS: Hawai'i visitors book in a variety of ways for any destination. Direct with the hotel is most popular, but about half also use online travel agencies and Airbnb-type services.

**In the past 12 months, how have you purchased a hotel room or paid accommodation?
(Please mark any that apply over the past year.)**

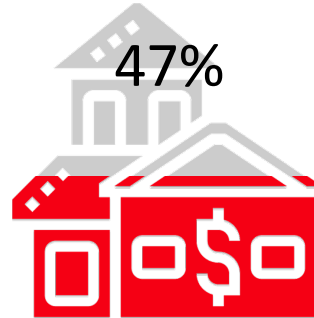
Among Hawai'i Past 3 Year Visitors (to Any Destination)



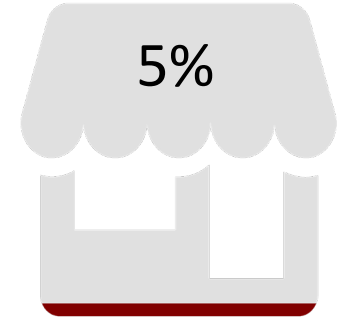
Hotel's website / direct with individual hotel or brand's website



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



Airbnb, Vrbo or similar site



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

Other 11%

Did not purchase 2%

SHOPPING WHILE ON VACATION: Shopping is not a key motivator for why LGBTQ community members pick one destination over another. However, CMI research often shows that once at a destination, the LGBTQ travel spend is similar to the general population. LGBTQ people shop at destinations, but it is not a primary motivator to select a destination.

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

	All LGBTQ Participants	Hawai'i Visitors Only
Shopping is really not relevant to why I pick one destination over another	67%	61%
I purchase local-made or unique products to remember my trip	62%	64%
I am more likely to splurge on a purchase while traveling than at home	35%	34%
I travel to purchase products that are cheaper than the prices at home	8%	8%
I pick destinations because of their shopping opportunities	3%	2%
I travel to destinations specifically to shop for designer brand or high-end products	2%	2%
None of the above	2%	2%



Base: All LGBTQ Travelers n=5,347; LGBTQ visitors to Hawaii in past three years n=567

Types of Media Viewed

In the past 30 days, which of these media have you viewed or listened to? Please check all that apply.
Among Hawai'i Past 3 Year Visitors

Hawai'i Visitors in the Past Three Years

Please note that not all participants have access to all the media sources below. For example not everyone would have access to LGBTQ regional newspapers or live in places with subways or bus shelters.	All Past 3 Year Visitors	Gay & Bi Men	Lesbian & Bi Women	Millennial+	Generation X	Baby Boomer
Facebook	83%	81%	84%	86%	79%	83%
I viewed the local network television stations for my area	65%	70%	61%	49%	70%	71%
YouTube	64%	67%	60%	80%	64%	53%
I listen to local radio stations in my car or at home	56%	55%	58%	52%	60%	55%
I pay attention to billboards in my local community	55%	53%	56%	57%	56%	52%
Instagram	54%	56%	51%	79%	58%	33%
I watched cable television networks live (like HGTV, FX, Food Channel)	51%	55%	49%	31%	56%	59%
I watched cable television networks streaming (like HGTV, FX, Food Channel)	45%	46%	45%	47%	50%	39%
Twitter	41%	42%	41%	53%	46%	30%
LGBTQ news website or app	40%	49%	32%	47%	43%	34%
LGBTQ entertainment website or app	32%	39%	25%	41%	36%	22%
Any dating app for the LGBTQ-community	28%	45%	9%	41%	29%	19%
LGBTQ national magazine	27%	33%	21%	15%	30%	32%
I pay attention to subway posters in my local community	26%	29%	23%	36%	27%	18%
LGBTQ regional newspaper	26%	29%	23%	17%	27%	31%
I pay attention to bus shelter posters in my local community	25%	25%	24%	28%	27%	21%

THANK YOU

For more information:

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