



 **CMI Community Marketing & Insights**
Leaders in LGBTQ Research since 1992

COVID-19 and LGBTQ Travel in 2020

May 2020

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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, on-site focus groups, virtual focus groups, and LGBTQ recruitment assistance to university and government LGBTQ research projects. CMI maintains our own panel of nearly 50,000 LGBTQ research participants. Our work is worldwide, with an emphasis on the United States, Canada, Mexico, China, and Japan. Industry leaders 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.

CMI is an LGBTQ Travel Industry Research Leader. In the past few years, we have produced studies for these and many other clients: Las Vegas CVA, Greater Fort Lauderdale CVB, NYC & Company, VisitBritain, Argentina Tourism Office, Hawaii Tourism Authority, Visit Florida, Greater Miami Convention & Visitor's Bureau, Tourism Toronto, Tourisme Montréal, West Hollywood Travel + Tourism Board, Travel Portland, Visit Raleigh, Discover Puerto Rico, Visit Salt Lake, W Hotels, Kimpton Hotels, and Hawaiian Airlines. CMI clients also span many other industries including Wells Fargo Bank, AT&T, Aetna, UPS, Google, Target, 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.



Executive Summary

EXECUTIVE SUMMARY

- This report focuses on the data from a 7-minute online survey of 1,864 self-identified members of the LGBTQ community living in the United States. Participants were age 20 to 70, and participation was from all 50 states.
- The survey was conducted May 14 - 19, 2020. Given the health and political nature of the pandemic response, results could have been quite different if taken 30 days prior, or 30 days later. The timeframe of the survey participation matters. Travel behavior may evolve to be more positive (or negative) as the pandemic and response progress.
- The LGBTQ community is an important segment in the travel industry and often perceived as first to “bounce back” after steep reductions in travel due to terrorism, recession, or a health crisis. The Harris Poll® conducted a travel survey in early May 2020 that compared LGBTQ and non-LGBTQ travelers, and the research seemed to support the resilience of the LGBTQ travel community. This study does not attempt to match responses with the general population; rather, his research aims to help facilitate recovery planning for CMI's travel industry clients with deeper insight into the LGBTQ community's travel plans and needs.
- This research strives to understand the planning of active LGBTQ leisure travelers (i.e., participants who took an overnight vacation in 2019). 84% of all participants took an overnight vacation of any type, and 68% took at least one overnight vacation by air in 2019.
- COVID-19 has financially impacted the LGBTQ community. 49% of LGBTQ participants indicated that COVID-19 has had a negative financial impact on their lives. The impact was reasonably consistent across most demographics. However, COVID-19 is having the greatest economic impact on LGBTQ community members with lower incomes. LGBTQ community members may have less income/savings for leisure travel this summer, and price-point may be especially important to encourage travel.
- 69% of all LGBTQ participants indicated extreme or moderate “pent-up” desire to travel again for vacation. 74% of the LGBTQ Vacation Travelers and 77% of the LGBTQ Air Vacation Travelers indicated extreme or moderate “pent-up” desire to travel again.

EXECUTIVE SUMMARY

- 72% of the LGBTQ travelers in the study have already canceled a vacation in 2020 because of COVID-19. This is both an impressive and unfortunate number and demonstrates the tremendous revenue loss for the travel industry. Cancellations were strongest for March through July 2020.
- 68% of LGBTQ vacation travelers plan to take at least one overnight vacation trip in the remainder of 2020, and 42% two or more vacation trips. These are impressive percentages, given the current travel climate.
- Importantly, only 29% of those intending to travel for vacation have actually booked their trip. *LGBTQ community members are travel consumers in transition. Most have canceled previous trips, most are open to planning a vacation, and most have not yet booked their future trip. This creates a tremendous opportunity for destinations and travel suppliers to capture new visitors during this planning process.*
- The research points to overall reductions in LGBTQ travel in 2020. That is no surprise, given the pandemic. 32% of LGBTQ community members who traveled for a vacation in 2019 are not expecting to travel for the remainder of 2020. All destination categories should expect reductions in LGBTQ visitation. However, the drop-off will be higher for more populated locations like big cities, with smaller reductions for outdoor and less-populated destinations. There may be an opportunity for some destinations to capture new LGBTQ travelers looking for options.
- Among LGBTQ travelers, there is a strong interest in drive vacations in 2020. For those not yet comfortable traveling by airplane, auto-based vacations provide a safer option. Of interest, visitors' acceptable drive times may be longer than many destinations assume to be true. This may be a trade-off: LGBTQ travelers are more willing to take a drive trip this summer compared to past years.

EXECUTIVE SUMMARY

- While most LGBTQ vacation travelers feel at least somewhat safe and comfortable staying in a hotel, only 10% indicated feeling “very” safe and comfortable. Most indicated that they would take additional precautions, like physical distancing, when visiting a hotel.
- The research identified several precautions that hotels could take to help LGBTQ guests feel safe. The most popular suggestions are increased cleaning of rooms, front desks implementing physical distancing requirements, hotel staff wearing face masks, and hotels having posted social distancing policies so all guests are informed.
- For the near future, LGBTQ travelers feel safest and most comfortable participating in activities in outdoor spaces and without crowds. These types of activities are available in all destinations including big cities. Urban destinations may need to reposition their messages for the short-term, focusing on outdoor attractions, urban parks, architecture and neighborhoods. Less-crowded indoor spaces like museums may also be attractive. Outdoor-focused destinations may be at an advantage, especially this summer. LGBTQ-event based tourism (such as Pride), often a travel motivation, is at a distinct disadvantage right now.
- CMI completed an analysis of LGBTQ participants living in USA “red states” vs. “blue states.” Blue state participants were somewhat more cautious in their travel plans and approaches. For example, 35% of red state participants vs. 26% of blue state participants were very or somewhat comfortable eating at a moderately crowded restaurant. Another example, 37% of red state participants vs. 29% of blue state participants were very or somewhat comfortable attending an outdoor event like a Pride festival or street fair. While these differences were significant, most participants in both categories indicated that they were not comfortable at this time.
- In summary, the LGBTQ community shares many of the COVID-19 health concerns as the American general public. The community has a desire to travel for vacation again, they have canceled past travel plans, and are now evaluating future travel options with caution. What is clear is that LGBTQ travel patterns will change this summer and into the fall. Destinations that can pivot and adjust to the “new travel normal” will be at the best advantage to minimize negative impacts on their local tourism industry.



Section One: About the Research, Participants and LGBTQ Travel in 2019 for Comparison

RESEARCH DESIGN

25+ YEARS OF LGBTQ INSIGHTS

Community Marketing & Insights (CMI) has built a proprietary research panel of nearly 50,000 LGBTQ consumers across North America through partnerships with more than 300 LGBTQ publications, websites, blogs, social media, apps, events, 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 a broad spectrum of LGBTQ consumers who are “out” and interacting within the LGBTQ community.

- › 7-minute online survey conducted May 14 - 19, 2020.
 - › This report focuses on the data of 1,864 self-identified members of the LGBTQ community living in the United States, including 887 gay and bi+ cisgender men, 794 lesbian and bi+ cisgender women and 183 transgender and non-binary community members.
 - › Participants were age 20 to 70. By generation, 702 of participants were Millennials+ (includes Gen Z age 20 or over), 599 Generation X, and 563 Baby Boomers (did not include Baby Boomers over age 70).
 - › Participation was from all 50 states.
 - › As an incentive, respondents entered into a drawing for one of five \$100 gift card prizes in recognition of their time to participate in the study.
- › **Weighting:** To balance the opinion by gender and generation, all LGBTQ weighted results were calculated with the following assumptions: Millennials+ (1981-2000) 33%, Generation X (1965-1980) 33%, Baby Boomer (1950-1964) 33%; gay and bi+ men 46%, lesbian and bi+ women 46%, and gender-expansive (transgender, trans woman, trans man, non-binary gender identity, genderqueer, and gender fluid) 8%.
 - › In this report, some percentages may not add up to 100% due to rounding or multiple selections allowed.
 - › The survey has a margin of error of $\pm 2.77\%$ at a 95% level of confidence.

FOUR IMPORTANT POINTS TO CONSIDER WHEN INTERPRETING THIS RESEARCH

- The survey was fielded May 14 -19, 2020. The COVID-19 pandemic is a very fluid situation. Participant response was during a time when the United States was beginning to open up economically, and the overall numbers of new cases and deaths were decreasing. However, the country was still very much responding to the consequences of the pandemic. Results could have been quite different if taken 30 days prior, or 30 days after. Travel behavior may evolve to be more positive (or negative) as the pandemic and response progress.
- The response to the pandemic became quite political in the United States, dividing the country into a more cautious liberal response and a more economically open conservative response. This is important to understand, because the LGBTQ community in the United States tends to be quite liberal.
- The participant's past travel history is important. Many COVID-19 studies try to understand the opinion of the entire population, regardless of their travel history. This study is meant to understand the impact of COVID-19 on active LGBTQ travelers. The study defines LGBTQ Vacation Travelers as a person who took at least one overnight leisure vacation in 2019 (84% of all participants).

- The LGBTQ community is perceived to be an essential segment in the travel industry. Research shows that LGBTQ community members travel more than the general population. Also, past perceptions indicate that LGBTQ community members are often first to bounce back and travel again after terrorist events or recessions that have negatively impacted the travel industry. However, COVID-19 is quite different as it involves personal health, which especially impacts older community members and those with a compromised immune system.

Note: The Harris Poll® conducted a travel survey in early May 2020 that compared LGBTQ and non-LGBTQ travelers, and the research seemed to support the resilience of the LGBTQ travel community (these results are available online).

The CMI study does not attempt to compare responses to the general population. This study aims to give deeper insight into LGBTQ community travel plans, in order to assist CMI's travel industry clients in their recovery planning.

PARTICIPANT PROFILE

Gender Identity	
Man	48%
Woman	43%
Transgender and Non-binary Identities*	9%

*transgender, trans woman, trans man, non-binary gender identity, genderqueer, and gender fluid

Household Income	
Under \$49,999	28%
\$50,000 to \$99,999	34%
\$100,000 or more	31%
Prefer not to answer	6%

Relationship Status	
Single	46%
Living with Partner	15%
Married or Civil Union	36%
Other	3%

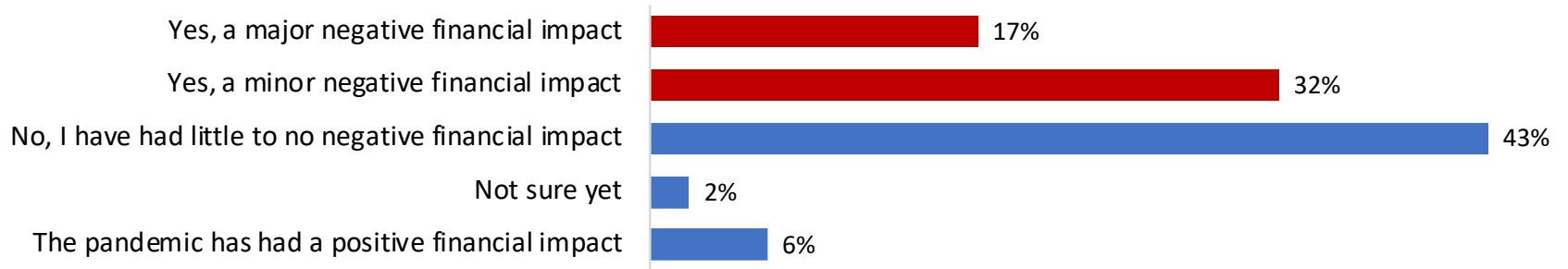
Generation	
Millennial+ (1981-2000)	38%
Gen X (1965-1980)	32%
Boomer+ (1950-1964)	30%

Ethnicity / Race	
Asian, Asian American or of Asian descent + Pacific Islander	5%
Black, African American or of African descent	10%
Latino, Latina, Latinx or Hispanic	12%
Native North American, American Indian, or Alaska Native	2%
White or Caucasian (Non-Hispanic)	70%
Mixed ethnicity or race	6%
Prefer not to answer	1%

Participants were represented from all states

Financial Impact: COVID-19 has financially impacted the LGBTQ community. 49% of LGBTQ participants indicated that COVID-19 has had a negative financial impact on their lives. The impact was reasonably consistent across demographics. However, COVID-19 is having the greatest economic impact on LGBTQ community members with lower incomes. Of those who experienced a negative financial impact, 26% had been laid off, furloughed, or lost their job, and 22% said they were still at work, but that their hours or pay had been reduced. LGBTQ community members may have less income/savings for leisure travel this summer, and price-point may be especially important to encourage travel. Note that these numbers should not be compared with government unemployment rates as the calculations are quite different.

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



Major or Minor Negative Financial Impact

All LGBTQ Participants	Lesbian & Bi+ Women	Gay & Bi+ Men	Transgender & Non-binary	Millennials+	Generation X	Baby Boomers	Earn <\$50K	Earn \$50K to \$99K	Earn 100K+
49%	48%	50%	47%	47%	51%	49%	56%	51%	40%

Base: All LGBTQ participants n= 1,864.

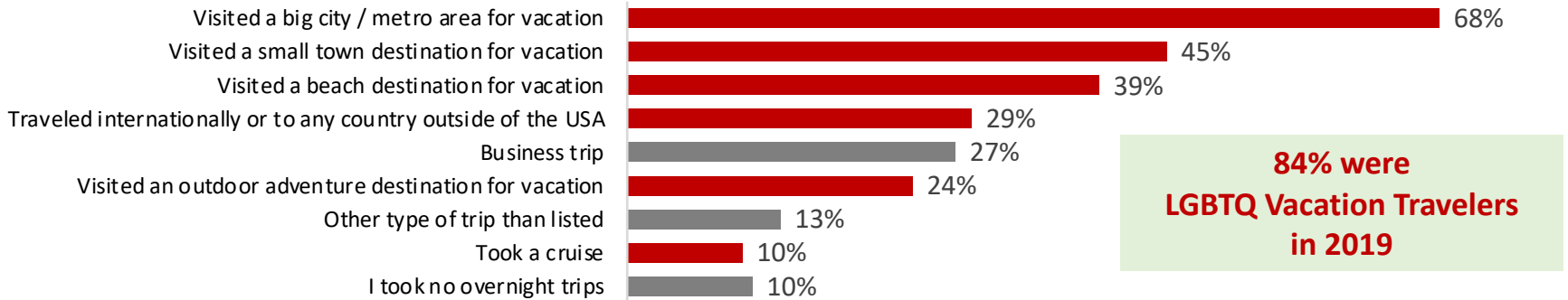
While at Home: Activities at home during the COVID-19 lockdown may give travel companies insight into future LGBTQ traveler motivations, e.g. an increased interest in cooking new foods might yield an interest in a destination’s regional cooking classes.

Because of COVID-19, which of these activities did you participate in at home more than usual? (Please mark all that apply.)	All LGBTQ Participants	Lesbian & Bi+ Women	Gay & Bi+ Men	Transgender & Non-binary Participants	Millennials +	Generation X	Baby Boomers
Watching more TV shows and movies	67%	66%	69%	59%	71%	66%	64%
Voice or video calls with friends and family	58%	65%	53%	38%	69%	59%	45%
Social media	52%	52%	52%	45%	58%	51%	45%
Cooking / baking new foods	51%	53%	51%	38%	57%	50%	46%
Work at home	48%	52%	44%	38%	60%	52%	31%
Extra cleaning of the house	46%	46%	47%	39%	50%	47%	41%
More time with pet(s)	44%	53%	34%	42%	46%	46%	40%
Reading	42%	47%	36%	42%	44%	38%	44%
Home repairs and projects	38%	39%	37%	34%	35%	40%	40%
Biking, walking or jogging for exercise	34%	37%	34%	21%	41%	32%	31%
Exercise in my home, yard or garage	32%	37%	28%	25%	39%	31%	27%
Gaming	24%	22%	24%	33%	40%	21%	11%
Donated to charities	20%	25%	16%	19%	22%	19%	20%
Reconnecting with people I live with	16%	20%	13%	16%	24%	16%	10%
Yoga or meditation	15%	21%	9%	11%	22%	13%	8%
I worked during this time and had no extra time	13%	14%	11%	21%	12%	18%	10%
Took classes / learned new skills	13%	15%	10%	15%	18%	12%	9%
Future travel planning	12%	13%	12%	6%	13%	11%	12%
Volunteer work	5%	7%	4%	5%	6%	5%	5%

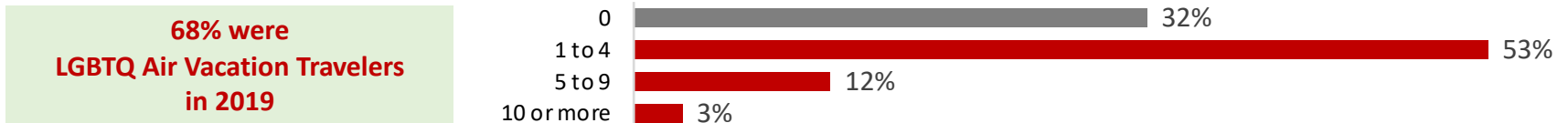
Base: All LGBTQ participants n= 1,864.

2019 Travel History: Past travel history is important. Some studies try to understand the opinion of an entire population, regardless of their travel history. This study is meant to understand the impact of COVID-19 on active LGBTQ leisure travelers. The definitions in the green boxes are important to understand in order to interpret the remainder of the report.

Think back to all of 2019. Which types of trips did you take, and spent at least one overnight? (Please mark all that apply.) All LGBTQ



In 2019, about how many round-trip airplane trips did you take for vacation? All LGBTQ

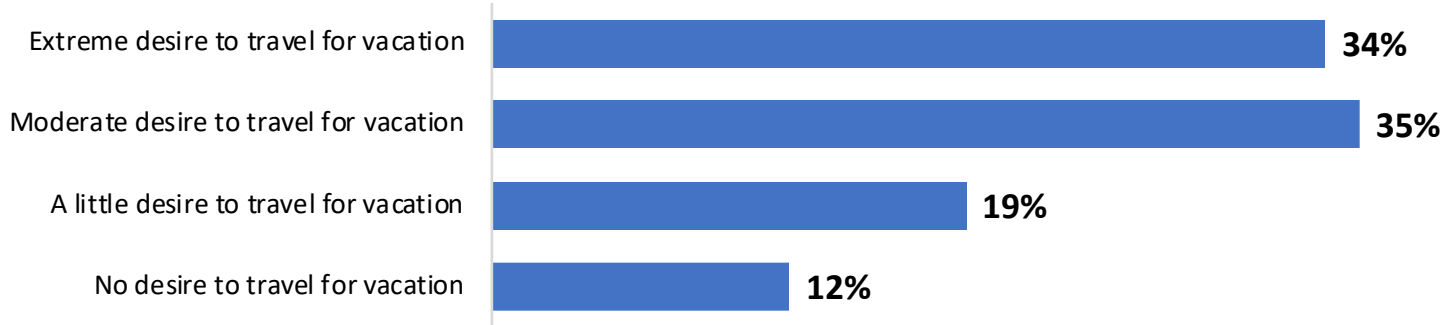


Base: All LGBTQ participants n= 1,864.

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. Looking at just those who had an extreme desire to travel, younger participants and higher-income participants had the highest percentages. 74% of the LGBTQ Vacation Travelers and 77% of the LGBTQ Air Vacation Travelers indicated extreme or moderate “pent-up” desire to travel again (see slide 13 for definitions).

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

All LGBTQ



Extreme Desire to Travel for Vacation

All LGBTQ Participants	Lesbian & Bi+ Women	Gay & Bi+ Men	Transgender & Non-binary	Millennials +	Generation X	Baby Boomers	Earn <\$50K	Earn \$50K to \$99K	Earn 100K+	Vacation Travelers in 2019	Air Vacation Travelers in 2019
34%	33%	37%	17%	40%	34%	27%	26%	34%	38%	37%	40%

Base: All LGBTQ participants n= 1,864.

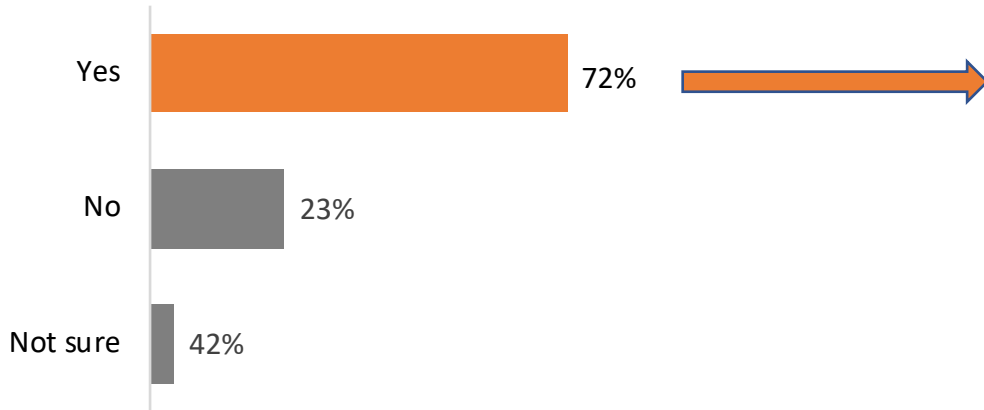


Section Two:

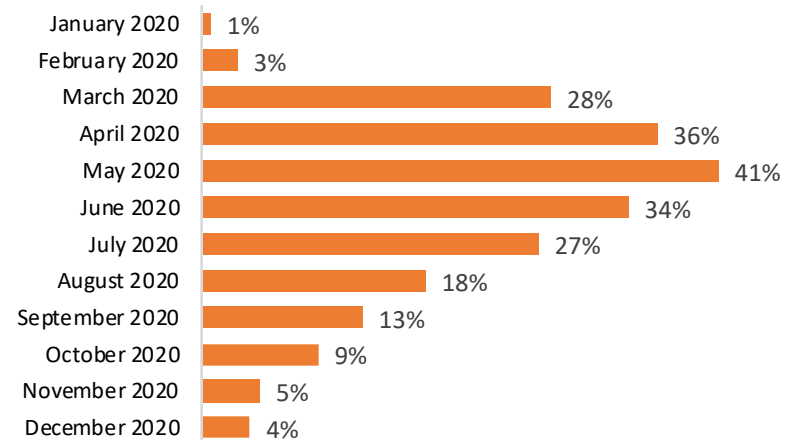
LGBTQ Travel for the Remainder of 2020

Trip Cancellations Among LGBTQ Travelers: 72% of the LGBTQ travelers have already canceled a vacation in 2020 because of COVID-19. This is both an impressive and unfortunate number, and demonstrates the tremendous revenue loss for the travel industry. Cancellations were strongest for March through July 2020. While there was a significant cancellation for the summer of 2020, there is opportunity to “pick up” new travelers who may now be making alternative or new summer travel plans as the economy starts to open.

Because of COVID-19, did you cancel any vacation travel plans for 2020? (Please mark all that apply.)
Among LGBTQ Vacation Travelers



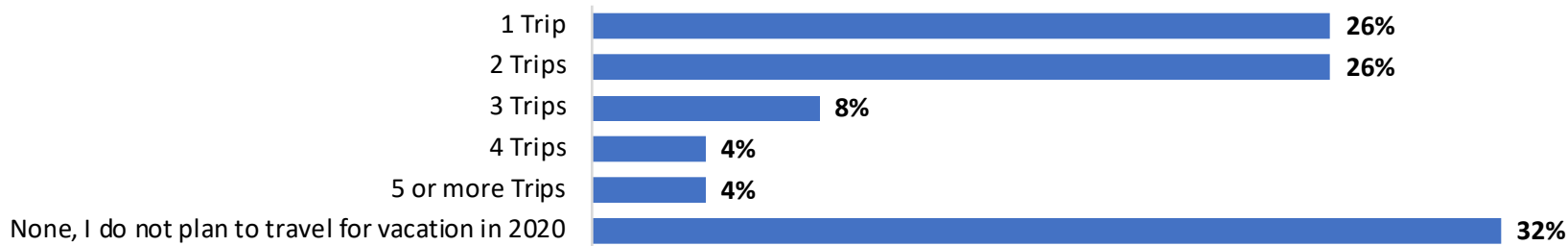
Of trip(s) that you canceled, in which months were the vacation trips originally planned? (Please select any months that apply.)



Base: LGBTQ Vacation Travelers n=1,566.

The Good News! Most LGBTQ Travelers Plan to Travel in 2020: 68% of LGBTQ Vacation Travelers (i.e. community members who took a vacation in 2019) plan to take at least one overnight vacation trip during the remainder of 2020, including 42% planning *two or more* vacations. These are impressive percentages given the current travel climate. Importantly, only 29% of those intending to travel for vacation have actually booked the trip. This slide, along with the previous slide, shows a travel consumer in transition. *Most have canceled previous trips, most are open to future trips, and most have not yet booked their future vacations. This creates tremendous opportunity to capture part of this transitional market.*

Considering COVID-19, your personal finances and other concerns, what is your best guess on the number of overnight vacation trips you are likely to take for the remainder of 2020 (by plane, train or car)? Do not include business trips. Among LGBTQ Vacation Travelers



71% of those planning trips have not booked any specific plans!

Only 20% of those planning trips have a specific trip already booked this summer (May to August).

Base: LGBTQ Vacation Travelers (those who took a vacation in 2019) n=1,566. LGBTQ Travelers who plan to travel in 2020 n=1,057.

The Bad News. Less Overall Travel: The research points to overall reductions in LGBTQ travel in 2020. That is no surprise, given the pandemic and stay-in-place orders. 32% of LGBTQ community members who traveled for a vacation in 2019 are not expecting to travel for the remainder of 2020. All destination categories should expect reductions in LGBTQ visitation. However, the drop off will likely be higher for big cities, with smaller reductions for outdoor and smaller destinations. There may be an opportunity for some destinations to capture new LGBTQ travelers looking for options.

For the remainder of 2020, to which types of destinations are you likely to travel for vacation (not for business)?
Please mark all that apply.

<i>Among LGBTQ Travelers</i>	Destinations traveled to for all of 2019	2019 Percentages at 67% or 8 of 12 months*	Expected Travel for the remainder of 2020 (May to December)
A big city / metro area for vacation	81%	54%	31%
A small town destination for vacation	54%	36%	29%
A beach destination for vacation	47%	31%	25%
An outdoor adventure destination for vacation	28%	19%	16%
Internationally or to any country outside of the USA	34%	23%	11%
Cruise	11%	7%	3%
I took no overnight trips in 2019	0%	0%	
I do not plan to travel for vacation in 2020			32%

*CMI realizes that these averages are not a perfect comparison. The goal is to give a broad view of reductions by destination category

Destination Types by Demographic: Gay & bi+ men and younger participants have a stronger interest in urban trips, while lesbian and bi+ and women have a stronger interest in outdoor vacations.

	All LGBTQ Travelers	Lesbian & Bi+ Women	Gay & Bi+ Men	Transgender & Non-binary Participants	Millennials +	Generation X	Baby Boomers
Visit a big city / metro area for vacation	31%	24%	38%	28%	34%	31%	26%
Visit a small town destination for vacation	29%	31%	29%	17%	29%	28%	31%
Visit a beach destination for vacation	25%	25%	26%	19%	25%	26%	24%
Visit an outdoor adventure destination for vacation	16%	20%	14%	9%	22%	15%	11%
Travel internationally to any country outside of the USA for vacation	11%	7%	14%	9%	12%	9%	10%
Take a cruise vacation	3%	2%	4%	0%	2%	4%	3%

Base: Varies by segment.

Location of Travel Destinations: Among LGBTQ travelers, there is a strong interest in drive vacations in 2020. For participants open to air travel, distance within the USA does not seem so important, once they commit to air travel. Many LGBTQ travelers are still considering international vacations. However, when asked directly, there appears to be a real concern over the safety of air travel, at least for the summer of 2020. Only 34% indicated that their next airplane trip would be sometime in 2020. Many want to wait and see how the pandemic progresses before making a decision.

For the remainder of 2020, where are these likely vacation destinations located? (Please mark all that apply.)

<i>Among LGBTQ Travelers Planning Vacations in 2020</i>	
Within driving distance from my home	69%
Longer flight distance (more than 2 hours) in the mainland USA	36%
Shorter flight distance (2 hours or less) in the mainland USA	29%
Europe	8%
Mexico	7%
Caribbean	5%
Canada	5%
Hawaii	4%
Central/South America	2%
Asia, Australia/New Zealand/Oceania, Africa	1% for each

Base: LGBTQ Vacation Travelers likely to travel in 2020 n=1,037.

When are you likely to take your next airplane trip for vacation (not for business)?

<i>Among LGBTQ Travelers</i>	LGBTQ Travelers Planning Vacations in 2020
May or June 2020	3%
July or August 2020	8%
September or October 2020	13%
November or December 2020	10%
Sometime in 2021	26%
After 2021	4%
Never	2%
I need to wait and see how the pandemic progresses to make this decision	36%

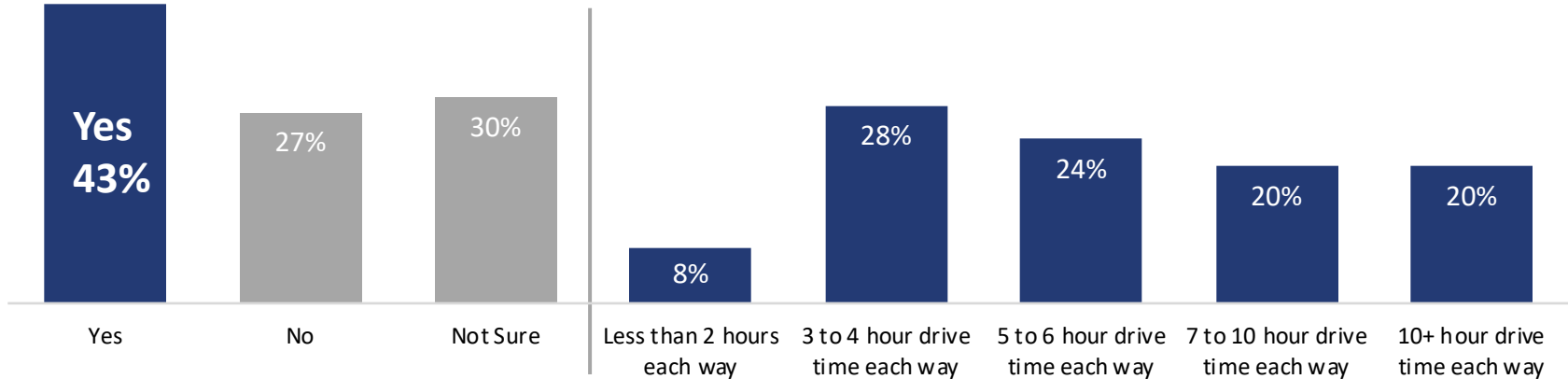
Base: LGBTQ Vacation Travelers n=1,566.

Car Vacations: There is strong interest in auto-based vacation travel this summer. For LGBTQ travelers not yet comfortable traveling by airplane, an auto-based vacation provides a safer option. Of interest, visitors’ acceptable drive times may be longer than many destinations assume to be true. This may be a trade-off: LGBTQ travelers are more willing to take a drive trip this summer compared to past years.



Are you likely to take an overnight car or driving vacation **this summer?**

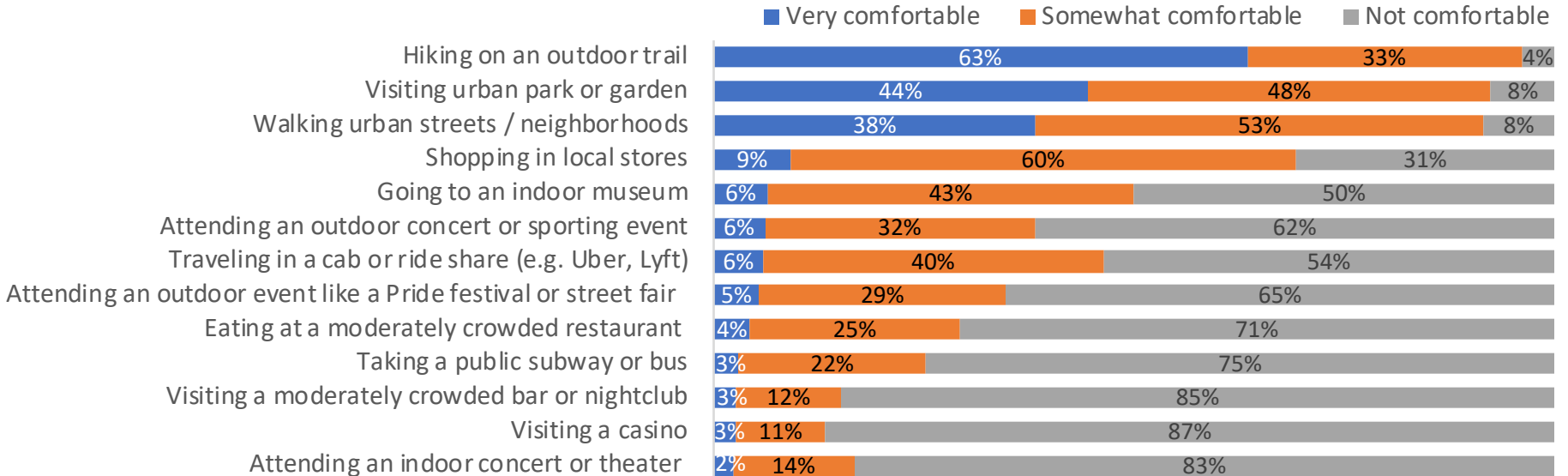
Realistically, how far are you willing to travel for an overnight car/driving vacation? (Please mark just one response, the farthest you would be willing to travel by car each way.)



All LGBTQ Vacation Travelers n=1,566. Those who said yes to a car vacation n=673.

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. Urban destinations may need to reposition their messages for the short-term, focusing on outdoor attractions, urban parks, architecture and urban neighborhoods. Less crowded indoor spaces like museums may also be attractive. Outdoor-focused destinations may be at an advantage, especially this summer. LGBTQ-event based tourism (such as Pride), often a travel motivator, is at a distinct disadvantage right now.

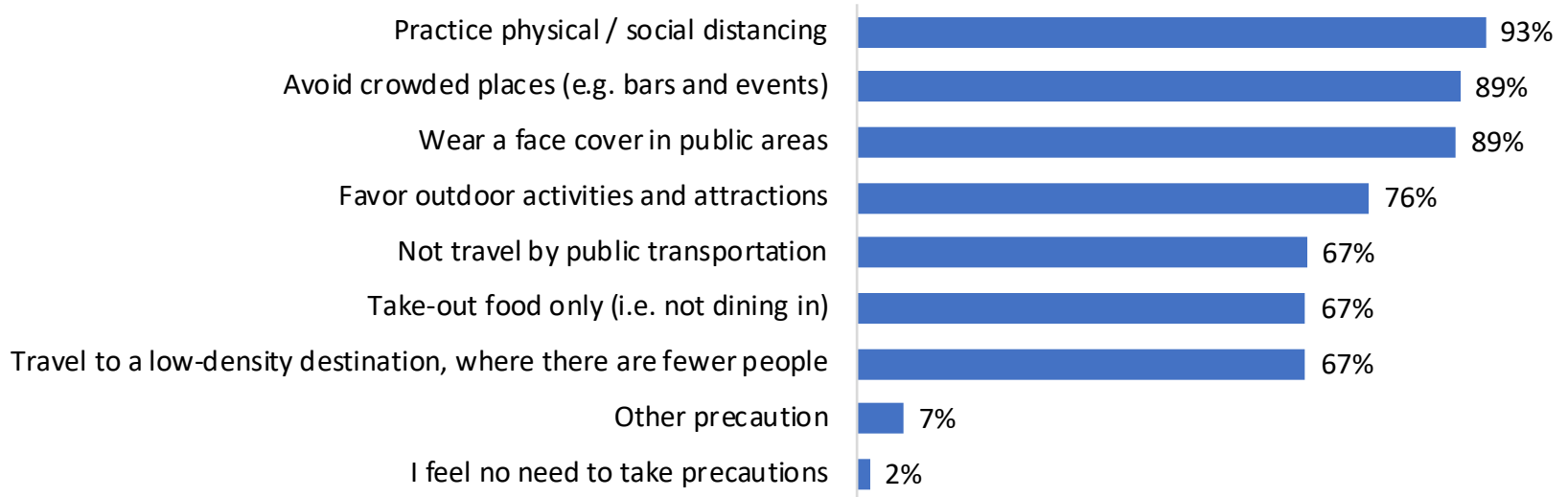
**For the rest of 2020, how safe and comfortable do you feel participating in these types of activities while traveling on vacation?
All LGBTQ Vacation Travelers**



Base: All LGBTQ Vacation Travelers n=1,566.

Precautions to Take at the Destination: 98% of LGBTQ travelers will take some kind of extra precautions while visiting a vacation destination. Most likely it depends on their personal safety level as they evaluate each setting during a trip.

When visiting a destination, which potential COVID-19 precautions will you take? (Please mark all that apply.)
Among All LGBTQ Travelers



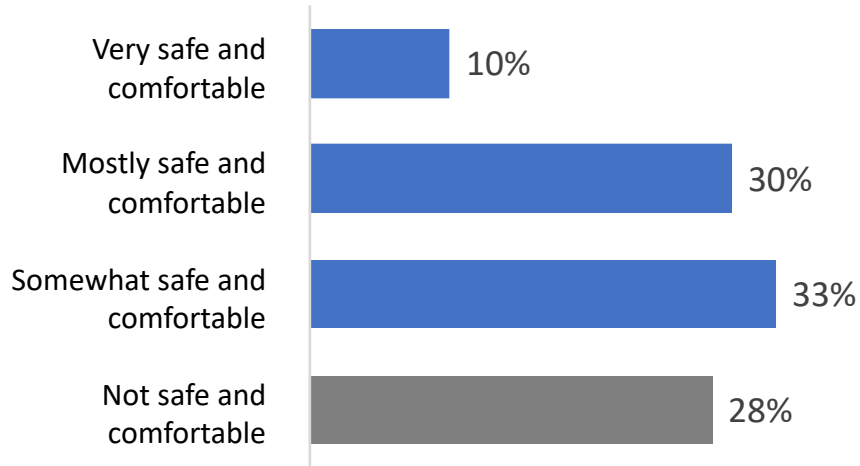


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Section Three: Hotels and Cruises

Hotels: While most LGBTQ Vacation Travelers feel at least somewhat safe and comfortable staying in a hotel, only 10% indicated feelings “very” safe and comfortable. Most indicated that they would take additional precautions when visiting a hotel.

Regardless of your travel plans, how safe and comfortable do you feel about staying in a hotel?



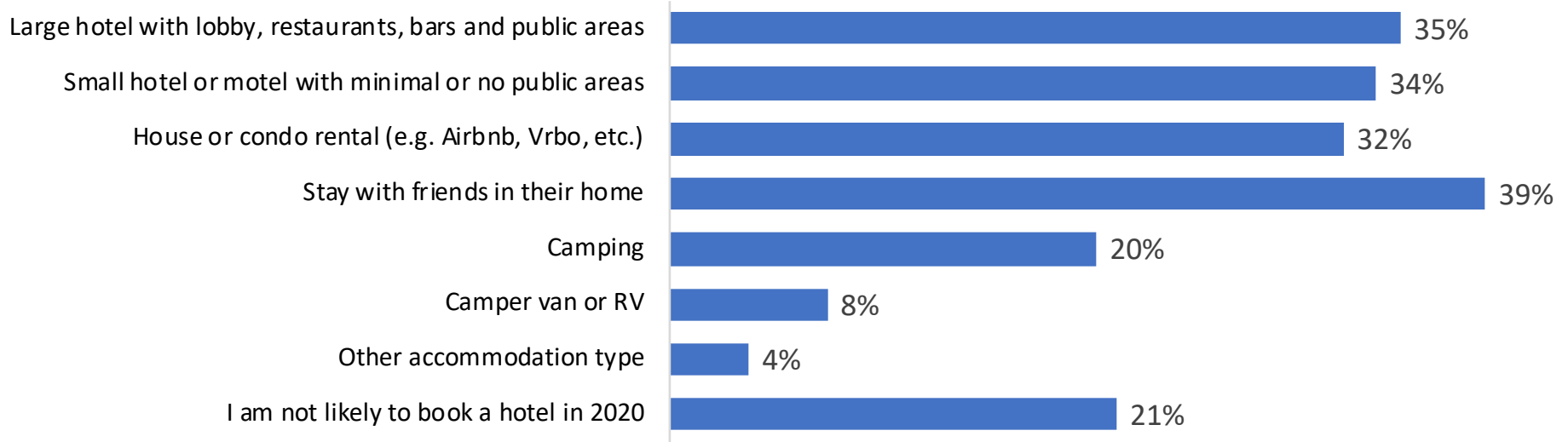
If you were to stay overnight in a hotel, would you take any of these precautions? (Please mark all that apply.)

Practice physical distancing from other guests	88%
Wear a face cover in public areas	82%
Practice physical distancing from hotel staff	76%
Check the hotel’s website for their COVID-19 safety policies	72%
Bring disinfecting cleaners for further cleaning	64%
Avoid common areas like restaurants and bars	59%
Ask for a room that has been vacant for at least one day	34%
Wear a face cover in the hotel room	10%
None of the above	3%

Base: All LGBTQ Vacation Travelers n=1,566. Safety precautions among those who were at least somewhat comfortable staying in a hotel n=1,124.

Types of Hotels: LGBTQ travelers are considering a number of different accommodation types. This chart demonstrates that travelers may be more open to many alternative accommodation options at this moment. Larger hotels will need to prove to travelers that they are a safe accommodation option.

**If planning a vacation, in which types of accommodations are you likely to book?
Please mark any that you consider to be a comfortable and safe option for you.**



Base: All LGBTQ Vacation Travelers n=1,565.

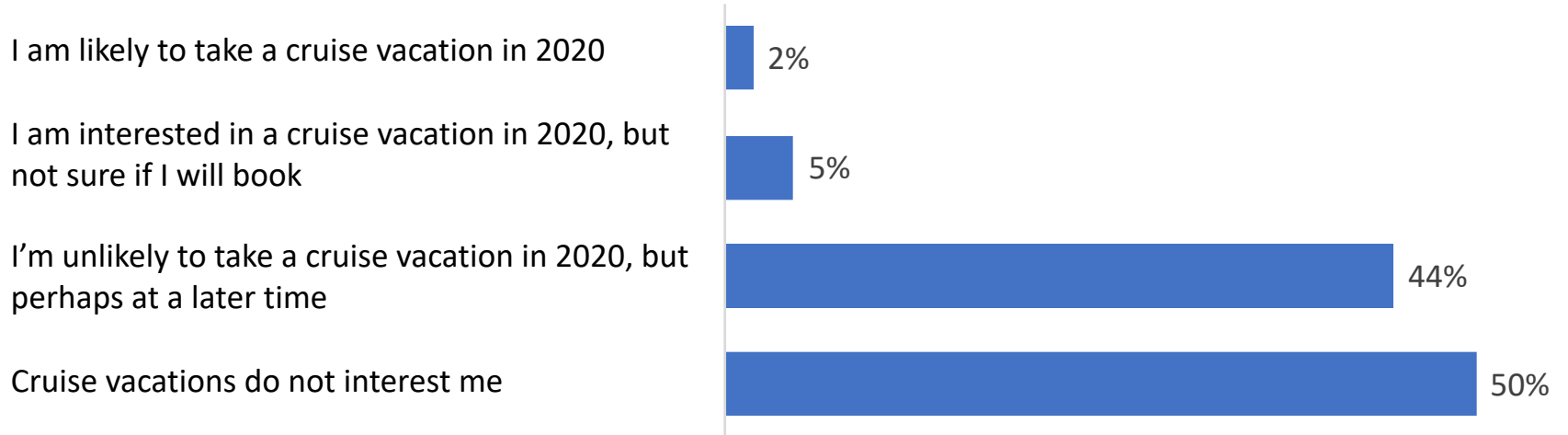
Hotels Making Guests Feel Safe: There are precautions that hotels can take to help LGBTQ guests feel safer and more comfortable.

**If you were to stay in a hotel, what are the most important things that a hotel can do to make you feel safe?
(Please mark all that apply.)**

Hotel increases disinfection/cleaning of rooms between guest stays	85%
Hotel front desk area has social distancing requirements between guests and staff	74%
Hotel staff are wearing face covers	73%
Hotel has a posted physical distancing policy for staff and guests as you enter hotel	70%
Hotel has contactless check-in/out procedures	63%
Hotel has posted COVID-19 safety information on their website	62%
Hotel leaves rooms vacant for at least one day between guest stays	60%
Hotel has smartphone / keyless room entry	46%
Gathering spaces are closed (e.g. restaurants and bars)	39%
I believe hotels should not operate yet	15%
Other suggestions	2%
None of the above are important to me	2%

Cruise Vacations: Among LGBTQ Vacation Travelers, only 2% indicated that they are likely to take a cruise vacation, with another 5% indicating that they would consider a cruise vacation in 2020. For comparison, in 2019, 11% of LGBTQ Vacation Travelers had taken a cruise. Of the 173 participants who indicated having taken a cruise vacation in 2019, 12% said that they are likely to take a cruise vacation, and 19% would consider a cruise in 2020.

For the rest of 2020, how likely are you to take a cruise vacation? (Please pick the best response.)



Base: All LGBTQ Vacation Travelers n=1,566.

FOR MORE INFORMATION:

CMI's highly specialized services are based on 25+ years of dedicated experience, producing LGBTQ market intelligence for leading corporate, university, government, and non-profit clients across the country and around the world.

Serving a variety of industries and organizations, we leverage our in-house proprietary panel of nearly 50,000 community-representative LGBTQ consumers to produce consumer survey studies, focus groups, interviews, etc. Additionally, our team of experts offers strategic consulting and marketing planning based on consumer insight, and we produce custom LGBTQ research/sales/marketing/best practices corporate training and conference presentations.

Contact CMI to learn more about custom research, analysis, and reporting on the variety of topics explored in our LGBTQ consumer studies, including:

- Financial Outlook
- Purchasing Behavior
- Media Consumption
- Living Environment
- Terminology
- LGBTQ Social / Peer Circles
- Brand 'LGBTQ friendliness'
- Social Concerns
- Technology
- Segments Within LGBTQ
- Travel Behavior
- Motivations
- Sports and Recreation
- Social Media Habits
- Product Categories
- Custom Surveys, Focus Groups, In-Depth Interviews and other research methodologies



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*For more information, contact
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david@CMI.info*

Member





CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992

LGBTQ Research Panel 2020

Community Marketing & Insights (CMI) is uniquely positioned in the global LGBTQ marketplace, with over 25 years of dedicated experience conducting LGBTQ consumer surveys, focus groups, in-depth interviews, advisory boards, consulting services and training. We skillfully assist our clients with strategies, tactics and cost-effective plans based on research results and case study experience.

CMI's PANEL CONSISTS OF OVER 49,000 SELF-IDENTIFYING LGBTQ COMMUNITY MEMBERS, WHICH INCLUDES:



44,000
LGBTQ Panelists
in the USA



5,000
LGBTQ Panelists
in Canada
(English + French Speaking)

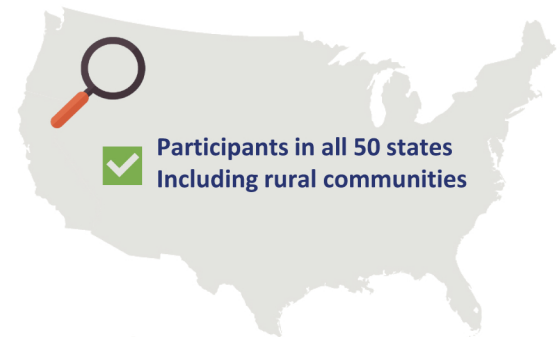


IN THE UNITED STATES, THE PANEL HAS SIGNIFICANT NUMBERS IN EVERY LGBTQ SEGMENT

15,000
Lesbian and
Bi+ Women



24,000
Gay and
Bi+ Men



Participants in all 50 states
Including rural communities

5,000
Transgender
and Non-binary
Community
Members



7,000
Bisexual and
Pansexual
Community
Members



5,000 With an HHI
Over \$150,000



5,000 With an HHI
Under \$25,000

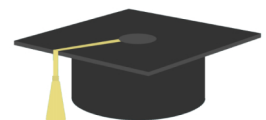
35%
Representing
LGBTQ
Communities
of Color



33%
Under Age
35



50%
With a BA or
Higher



10%
LGBTQ Parents with
a Child Under 18
Living at Home



20%
Legally Married



**LGBTQ Youth Research
Experience**
(in partnership with an
institution and IRB approval)



FOR MORE INFORMATION ON CMI'S LGBTQ RESEARCH CAPABILITIES, PLEASE VISIT WWW.CMI.INFO
CONTACT THOMAS ROTH at tom@cmi.info or call +1 (415) 343-4656