Community Marketing, Inc.

Understanding and Reaching Gay & Lesbian Travelers

National Gay & Lesbian Chamber of Commerce Destination Industry Seminar

Thomas Roth, MBA, President Community Marketing, Inc.
Thank you.
Gay owned and operated, NGLCC Accredited company founded in 1992. Office at 18th & Castro, San Francisco, the gayest four corners in the world. Serve clients around the world.

Got our start in the tourism and hospitality industries in the early ‘90s, and have leveraged our expertise to other industries.

Currently serving about 20 key clients with research and marketing management, including some of the greatest LGBT success stories such as Palm Springs, San Francisco, Las Vegas, Travelocity and Kimpton Hotels to name just a few.

Over the last decade we have built our own proprietary panel of over 45,000 opt-in consumer research participants, from which we derive our survey and focus group studies.
Today’s Presentation

Methodologies: Online Surveys and Focus Groups.

Focus groups spot trends.

We’ve invested resources into understanding young adult and diversity segments within “LGBT.”

Keeping it positive.
The basics: Why is travel so important to gay and lesbian people?

- Because we can.
- Camaraderie, companionship.
- Experience other gay cultures.
- ESCAPE!

*From what...?*
Why is travel so important to gay and lesbian people?

Nigeria set to ban gay life

Nigerian lawmakers are expected to pass pending legislation that will ban nearly everything gay.

The measure outlaws belonging to a gay group, reading a gay book, watching a gay movie, visiting a gay Internet site, and socializing by two or more gay people. For good measure, the bill also bans same-sex marriage.

Violating the proposed law would result in up to five years in prison.

Gay sex is already illegal. It is punished with death in Muslim areas of the nation and with jail time in Christian sections.
Why is travel so important to gay and lesbian people?

Marriage Protection Act

On July 23, 2004, with strong backing from the Bush administration, the Marriage Protection Act was adopted in the U.S. House of Representatives 233 to 194. The bill would strip the federal courts of jurisdiction over legal challenges to the Defense of Marriage Act (DOMA), a federal law passed in 1996 that purports to leave the recognition of same-sex marriage entirely to each state.
Why is travel so important to gay and lesbian people?

**Voters pass all 11 bans on gay marriage**

Ballot initiatives pave the way for new court battles

*The Associated Press*

Updated: 3:56 p.m. AKT Nov 3, 2004

Elated by an 11-for-11 rejection of gay marriage in state elections, conservatives Wednesday urged Congress to follow suit by approving a federal constitutional amendment that would extend the prohibition nationwide.

The state victories “are a prelude to the real battle,” said Matt Daniels, whose Alliance for Marriage has pushed for congressional action. “Ultimately, only our Federal Marriage Amendment will protect marriage.”

Gay activists, though dejected after the overwhelming rebuff, vowed to keep fighting.
Why is travel so important to gay and lesbian people?

Drives to ban gay adoption heat up in 16 states

By Andrea Stone, USA TODAY

Efforts to ban gays and lesbians from adopting children are emerging across the USA as a second front in the culture wars that began during the 2004 elections over same-sex marriage.

Steps to pass laws or secure November ballot initiatives are underway in at least 16 states, adoption, gay rights and conservative groups say. Some — such as Ohio, Georgia and Kentucky — approved constitutional amendments in 2004 banning gay marriage. (Related story: Both sides cite concern for children)
Why is travel so important to gay and lesbian people?

Republicans Relaunch the Antigay Culture Wars

by DOUG IRELAND

[from the October 20, 2003 issue]

As George Bush's poll numbers began seriously dwindling, Karl Rove and the White House political strategists decided to reach into their bag of tricks and come up with a good old staple of reactionary politics: homophobia.

The decision to scapegoat gay and lesbian Americans was poll-driven by an antigay backlash that gathered steam in the wake of the Supreme Court's June 26 decision, in Lawrence v. Texas, striking down laws making gay sex between consenting adults illegal—the so-called sodomy laws. The backlash first surfaced in a July 25-27 Gallup poll. It showed that support for legalizing gay sex had plummeted a dramatic twelve points, to only 48 percent, down from a comfortable 60 percent in favor of legalization in Gallup's May survey. Those saying "homosexuality should be considered an acceptable lifestyle" also slalomed down from 54 to 46 percent; and support for same-sex civil unions dropped from 49 to 40 percent. Two weeks later, a Washington Post poll showed that support for gay civil unions had dropped three points lower than in Gallup's. Since then, five other national polls have confirmed the antigay trend.
Why is travel so important to gay and lesbian people?

Jamaican mob targets four gay men

A mob of men, women, teens and children surrounded a pharmacy in Kingston, Jamaica, Feb. 14 and demanded that four gay men inside come out and face punishment for being homosexuals.

The crowd formed after another shopper took exception to the men's presence and began screaming that "battymen," or faggots, must be killed.

Police eventually rescued the men, three of whom "had bleached-out faces" and were "dressed in tight jeans pants and skimpy shirts," the Jamaica Observer newspaper reported. The officers had to fire tear gas into the crowd of 200 to clear an exit path.

One of the gay men was hit in the head with a rock while being escorted to a police vehicle.

"Unu can come save them nasty boy yah? Them boy yah fi go down," one member of the mob shouted at police, the Observer said. The statement means the men must be burned to death.

After rescuing the men, the police officers disparaged them en route to, and at, the police station, according to a statement from the Jamaica Forum for Lesbians, All-Sexuals and Gays.
Why is travel so important to gay and lesbian people?

LOCAL NEWS

Firing gay workers still legal in Ga.
Best hope for job protections lies at federal level

By Ryan Lee
Friday, January 26, 2007

Fresh out of law school, where she finished sixth in her graduating class, Robin Shahar was well versed in Georgia law and justice.

But she was also grounded in a sense of right and wrong, and before her legal career could even begin she learned that what is legal does not always harmonize with what is right.

“I was extremely surprised,” Shahar said this week, recalling the day in 1991 that she was summoned into her new boss's office and received the news that she was being fired for being a lesbian.
Why is travel so important to gay and lesbian people?

US Army Linguists Fired for Being Gay
All Spent Months In Intensive Training

SAN FRANCISCO – Nine United States Army linguists, including six trained to speak Arabic, have been dismissed from the military because they are gay.

The soldiers' dismissals come at a time when the US military is facing a critical shortage of translators and interpreters for the fight against terrorism.

Seven of the soldiers were discharged after telling superiors they were gay, and another two got into trouble when they were caught together after curfew, said a spokesman for the Servicemembers' Legal Defense Network, which defends homosexuals in the military.

Six were specializing in Arabic, two were studying Korean and one was studying Mandarin Chinese. All were at the Defense Language Institute in Monterey, California, the military's primary language training center.
Why is travel so important to gay and lesbian people?

There is a lot that goes into the “gay travel” decision. Your awareness of these issues will help you serve LGBT visitors more sensitively.
Orientation: Alphabet Training and Terminology

• Not OK: Sexual preference, alternative lifestyle
  your “friend,” those people, that market

• OK: LGBT/GLBT, partner, husband (/wife),
  sexual orientation, sexual identity

• LGBT or GLBT (lesbian, gay, bisexual, transgender)
• QQ (queer and questioning)
• Gay and Lesbian Community

Examples in use:

  NLGJA       National Lesbian & Gay Journalists Association
  NGLCC       National Gay & Lesbian Chamber of Commerce
  IGLTA       International Gay & Lesbian Travel Association
Some key findings from CMI’s Consumer Research

CMI has conducted annual LGBT tourism studies since 1994.
CMI Gay Market Research + Development Lab®

Surveys • Focus Groups • Strategic Planning
Marketing Plan Development, Implementation and Management
Since 1992

Las Vegas
New York City
San Francisco
Dallas
Palm Springs
Canada
Switzerland
France
Spain
Travelocity
Accor Hotels
Starwood
and many more…

Las Vegas
New York City
San Francisco
Dallas
Palm Springs
Canada
Switzerland
France
Spain
Travelocity
Accor Hotels
Starwood
and many more…

Las Vegas
New York City
San Francisco
Dallas
Palm Springs
Canada
Switzerland
France
Spain
Travelocity
Accor Hotels
Starwood
and many more…

Las Vegas
New York City
San Francisco
Dallas
Palm Springs
Canada
Switzerland
France
Spain
Travelocity
Accor Hotels
Starwood
and many more…
CMI’s Annual LGBT Tourism Report

A few key findings...

❖ Gay male and lesbian consumers travel more than the mainstream. 98% of gay and lesbian survey respondents indicated they had taken at least one overnight trip in the last twelve months compared to 72% of mainstream Americans.

❖ Gay male and lesbian consumers travel for longer periods than mainstream travelers. The median length of trips taken by mainstream US residents (where they stayed at least one night away from home) is six nights, twice the median than the mainstream.

❖ 68% of male respondents traveled internationally last year
Research key findings...

- A community primarily consisting of “DINKS.”
- Spend more on travel... But *value* is important.
- There is no one “LGBT” market!
  Rather, this is a group of distinct *market segments* with a common experience.
  Research helps identify your best market matches.
Gay & Lesbian Travel Frequency

- US GLBT Travelers
  - Long Leisure
  - Short Leisure
  - Business & Other

- US Mainstream
  - Long Leisure
  - Short Leisure
  - Business & Other
CMI’s LGBT Travel Profile

- Top destinations vary, depending on demographic

Gay Men 60+: New York, Palm Springs, Fort Lauderdale, San Francisco

For future travel, gay young adults favor Chicago over other urban destinations, and are more likely to visit urban destinations in general.
### Number of Nights Away

<table>
<thead>
<tr>
<th></th>
<th>No of Nights</th>
<th>Nts per Stay</th>
<th>$ Spent</th>
<th>$ per day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure</td>
<td>12</td>
<td>6</td>
<td>$3,063</td>
<td>$255</td>
</tr>
<tr>
<td>Personal</td>
<td>9</td>
<td>4</td>
<td>$1,139</td>
<td>$127</td>
</tr>
<tr>
<td>Business</td>
<td>8</td>
<td>8</td>
<td>$2,071</td>
<td>$259</td>
</tr>
<tr>
<td>TOTAL/AVG</td>
<td>29</td>
<td>6</td>
<td>$6,273</td>
<td>$216</td>
</tr>
</tbody>
</table>

Median is US $216/day; or $255/day for leisure travel.

Case study: From research conducted by CMI for GPTMC, we found that gay overnight visitors spent US $233 in Philadelphia, compared $101 among their mainstream visitors.
The Influence of Tourism Marketing on LGBT Choice of Destinations

- 69% of US respondents are more likely to visit a destination because its tourism office/CVB does LGBT outreach.
- 39% indicate they spend more.
- 38% stay longer.
An expanding market: Expected Change in Travel Spending

-30%  -20%  -10%  0%  10%  20%  30%  40%  50%

More than this year
Less than this year

Business / work  Personal / see family or friends  Leisure / vacation or holiday

Gay & Lesbian Tourism
Community Marketing, Inc.
Connecting our Clients with the Gay & Lesbian Community Since 1992
Visit www.CommunityMarketingInc.com
© Duplication by permission only.
Gay Market Research + Development Lab®
NGLCC
Destination Industry Seminar
A market that grows every day:

The gay population of Nebraska jumped 71 percent between 2000 and 2005, to a total of 43,000, according to a new analysis of Census Bureau figures. In Kansas, the number of people who said they were gay rose 68 percent, and in Iowa, the increase was 58 percent. Gays are not flocking to rural states, demographers say; rather those already there are more willing to acknowledge their sexuality.

_The Atlantic Monthly_ as reported in _The Week_
8 key focus group insights

CMI has conducted over 100 focus groups and advisory boards in the past couple of years…
Insight #1

Ad agency’s clever concepts only work about 25% of the time.

If your “clever” concept works... it is *remembered*.

But if your “clever” concept fails... it’s *rejected*.
Case Studies: Gay & Lesbian Advertising Creative

CLEVER. (Very clever.)

Community Marketing, Inc.

Connecting our Clients with the Gay & Lesbian Community Since 1992
Visit www.CommunityMarketingInc.com
© Duplication by permission only.
Case Studies: Gay & Lesbian Advertising Creative
Case Studies: Gay & Lesbian Advertising Creative

CLEVER.

Community Marketing, Inc.
Connecting our Clients with the Gay & Lesbian Community Since 1992
Visit www.CommunityMarketingInc.com
© Duplication by permission only.

Gay & Lesbian Tourism
NGLCC
Destination Industry Seminar
Insight #2

If you can’t come up with a clever concept, revert to the practicalities of your product.

It works!
Case Studies: Gay & Lesbian Advertising Creative

It works.
Insight #3

Proceed with caution...

Those shirtless white guys are starting to be rejected by multiple groups

Positives

• Sex still sells (or at least attracts attention)
• Romance is very well-received
• Real men and women: perceived better than models

Pitfalls

• Does not connect with lesbians (duh!)
• Young adults skeptical
• Older baby boomers often feeling rejected
• When out of context, it can appear patronizing
Case Studies: Gay & Lesbian Advertising Creative
Insight #4

Lesbians are becoming increasingly frustrated with the male-dominated imagery approach to the “gay and lesbian” community...

And they should be!
Among the first.

And there haven’t been many since, either.
Insight #5

The face of all America under 25 has no ethnic majority... this applies to LGBT young adults, too.

Young LGBT adults are looking for *inclusivity.*
Case Studies: Gay & Lesbian Advertising Creative

Diversity is the face of <30.

Inclusive new imagery from RSVP and Atlantis

Community Marketing, Inc.
Connecting our Clients with the Gay & Lesbian Community Since 1992
Visit www.CommunityMarketingInc.com
© Duplication by permission only.
Tell your ad agency!

- Your ads must have genuine (*real*) gay/lesbian-dedicated photography and messaging.
- Your ads need to be placed in the LGBT media.
- Your ads should portray the community’s diversity.
- Your ads should communicate your good community citizenship (sponsorships, etc.).
- Your ads need to be direct and to the point (but can be fun/clever, too). Avoid vague, over-stylish, award-winning, avant garde creative that does not get your point across.
Insight #6

Gay-Friendly Does Matter:

But in a world of increasing social and corporate acceptance and visibility...

“Gay-friendly” alone isn’t enough to move LGBT market share any more.

And its already happening in some segments!
“Gay-Friendly” Does Matter

Percentage of gay and lesbian consumers whose purchasing decisions are favorably influenced by...

<table>
<thead>
<tr>
<th></th>
<th>Gay</th>
<th>Lesbian</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsorship of LGBT Events</td>
<td>89%</td>
<td>91%</td>
</tr>
<tr>
<td>Equal Employment Practices</td>
<td>89%</td>
<td>92%</td>
</tr>
<tr>
<td>Advertising in LGBT Media</td>
<td>86%</td>
<td>86%</td>
</tr>
</tbody>
</table>
What influences you most when choosing a destination?

**Trend:**
As more hotels and destinations are reaching out, practicalities are trumping gay.
Insight #7

If “image is everything,”...who are these guys? And why do their photos appear on all those ads?
Case Studies: Gay & Lesbian Advertising Creative

KIMPTON AND THE LGBT COMMUNITY
Kimon Hotels welcomes everyone. You'll find people from all over the world who feel at home in our stylish surroundings, including gays and lesbians, families, single women, pet lovers, and even their pets. So whether you're looking for fun, adventure or a blissful night's sleep, you'll find that all our hotels have something in common - a sense of inclusiveness.
Case Study: Kimpton Photo Shoot
Case Study: Kimpton Photo Shoot

Community Marketing, Inc.
Connecting our Clients with the Gay & Lesbian Community Since 1992
Visit www.CommunityMarketingInc.com
© Duplication by permission only.

Gay & Lesbian Tourism
NGLCC
Destination Industry Seminar
Case Study: Kimpton Photo Shoot

Community Marketing, Inc.
Connecting our Clients with the Gay & Lesbian Community Since 1992
Visit www.CommunityMarketingInc.com
© Duplication by permission only.

Gay & Lesbian Tourism
NGLCC
Destination Industry Seminar
Case Study: Kimpton Photo Shoot

To access the photo shoot story board: kimptonhotels.com/lgbt
Insight #8

Trailblazers are incorporating both gay and straight imagery into their “mainstream” marketing materials...

1. Gay marketing can be an indicator to many straight consumers that a destination is trendy and more diverse.

2. It tests well in both gay and straight focus groups in urban environments.

3. Companies can differentiate themselves from competition through expanded diversity.
Case Studies: Gay & Lesbian Advertising Creative
Case Studies: Gay & Lesbian Advertising Creative

Make a keepsake in just two steps!

1. Browse our selection and choose the keepsake you want.
2. Add your photos and add it to the cart.

15 oz Mug (White)
Anyone who has ever had a favorite mug knows that a mug is a personal and beloved thing, made even more personal and beloved when it bears a photo of a grinning loved one. A mug is yours. You don't want to share it. And when it "disappears" at the office, you feel sad! So let us alloy your mug-glutting fears and set the record straight: mugs make great gifts!
price: $15.95

Gay & Lesbian Tourism
NGLCC
Destination Industry Seminar
6 Focus Group Take-Aways:

1. Focus group your ads and messaging before hitting the market. We’ve found at least 50% are off the mark! (way off)
2. Do a qualifying survey to obtain an appropriately-matched mix of participants.
3. You can’t attain confidence from one focus group, or from one city.
4. Focus groups tend to be opinionated, critical and negative. Try not to be offended or defensive.
5. Observe the sessions from behind the mirrored glass, and give feedback to the facilitator.
6. Take a frequent pulse on your markets with multiple methodologies: online surveys, field surveys, focus groups, advisory boards, customer service and/or exit surveys.
Marketing Plan
Recommendations
Developing Your “Gay-Welcoming” Marketing Plan

1. Start small and build over time. No market is won in a day.
2. Seek help from your employees and/or an objective advisor.
3. Look to partner with LGBT organizations, other successful travel companies (or destinations) and media.
4. Evaluate and plan your marketing options carefully: There are hundreds of choices, and none are effective independent of a plan.
5. Track results
   Be willing to ask tracking questions (or stop fussing).
Tracking the results of your campaign.

Philadelphia: Research found that every $1 invested into LGBT marketing yielded $153 in ROI.
Tracking the results of your campaign.

Kimpton Hotels

- InTouch Loyalty Program:
  8,000 members in 18 months
  Generates US $4.5 million/year

- PRI Code for Partner Organizations:
  10% Off Group and Banquets Revenue.
This is a dynamic, evolving market. Stay engaged.

No marketers are immune (e.g. Fort Lauderdale)
An effective LGBT marketing plan includes multiple elements:

- Print (regional, national, international)
- Internet (microsite, banners)
- Interactive (podcasts, myspace, etc.)
- Direct Marketing (mail and email)
- Media relations (press trips, press releases)
- Direct Contact (trade shows, etc.)
- Community Involvement (sponsorships, etc.)
Gay-Friendly Check List:
Some principles to consider when evaluating whether a company is truly “gay-friendly.”

» Is nondiscrimination based on “sexual orientation” included in your hiring policies?
» Do you treat your employees’ hetero spouses and same-sex partners the same way when determining employee benefits?
» Do you include gay & lesbian sensitivity issues in your sales and customer service training?
» Does your company participate in community involvement programs?
» Do you source LGBT-owned businesses (NGLCC Accredited)?
» Is your company a member of local and national LGBT business and trade associations?
A few follow-ups:
Join the LGBT Travel Industry’s Membership Organization

www.IGLTA.org
Community Marketing’s 8th International Conference on Gay & Lesbian Tourism

Dec 2-5, 2007
St. Regis Hotel
Fort Lauderdale, FL

Premiere meeting of industry leaders

Custom, on-site workshops also available
Print Media: Travel Trade

CMI’s Annual Gay & Lesbian Travel Industry Directory

Gay and Gay-Friendly
• Destinations
• Tour Operators
• Accommodations

Community Marketing, Inc.
Connecting our Clients with the Gay & Lesbian Community Since 1992
Visit www.CommunityMarketingInc.com
© Duplication by permission only.

Gay & Lesbian Tourism
NGLCC
Destination Industry Seminar
TAG Approved® Accommodations
1,000 Objectively qualified properties worldwide

Before you check in, check out our
GAY-FRIENDLIER
WORLD™

TAG Approved® Accommodations
✓ Strive to create a gay-friendly experience for their guests
✓ Actively outreach to the gay & lesbian community
✓ Do not discriminate on the basis of sexual orientation in their employment practices

Research and links to TAG Approved®
gay-welcoming hotels, resorts and inns
www.tagapproved.com

Book online! travelocity.com/gaytravel

TAG Approved® is a registered trademark of Community Marketing, Inc. • Gay-Owned & Operated
For more information please visit us at www.communitymarketinginc.com

www.tagapproved.com

TAG Approved Accommodations Directory 2007

Online Directory
Semi-Annual Print Directory

Community Marketing, Inc.
Connecting our Clients with the Gay & Lesbian Community Since 1992
Visit www.CommunityMarketingInc.com
© Duplication by permission only.

Gay & Lesbian Tourism
NGLCC
Destination Industry Seminar
THANK YOU

Thomas Roth
Community Marketing, Inc.
Research, development, communications and marketing strategies

Tel +1 415/437-3800
tom@CommunityMarketingInc.com
www.CommunityMarketingInc.com