

January 2014 – March 2015 Virginia LGBT TravelsAmerica Visitor Profile Report August 10, 2015



January 2014 – March 2015 Virginia
LGBT

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VIRGINIA IS FOR LOVERS

Job #212 241402

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Growth summary



Your business issues

- Tourism represents one of the top industries in Virginia, expected to generate \$22 billion in visitor spending, support 216,300 jobs, and add \$1.5 billion in state and local taxes in 2014.
- The Virginia Tourism Corporation wants to continue to grow its tourism sector by understanding its visitors' characteristics, specifically, the impact of those identifying as LGBT on tourism in the region. Goals include:
 - Encouraging more LGBT travelers to visit the state
 - Increasing revenue from current LGBT travelers by advocating longer trips
 - Motivating current LGBT travelers to add more visits throughout the year and to take advantage of a state steeped in history (Jamestown, Yorktown, Williamsburg, top museums, arts, etc.), outdoor adventures, fine dining, vineyards, breweries, and other activities available in the area.

Growth summary



Growth insights

- The South and Mid-Atlantic states represent the most viable markets for the region, as these areas provide the majority of visitors.
- LGBT travelers skew younger than non-LGBT travelers, likely a result of greater cultural tolerance that makes them more willing to identify as LGBT.
- More of them live in smaller households (1 or 2 people), have higher education, and still work. As such, they can afford to take longer trips and pay for lodging ... and they do.
- Each state in the region has many activities and features that appeal to different tastes, so messaging can target interests by market.
- Compared to non-LGBT travelers, LGBTs note greater interest in visiting friends (but not relatives), and upscale activities (fine dining, sightseeing, nightclubs, and art galleries), making them lucrative tourists.
- They exchange information. They gather travel information from friends and, in turn, skew as influencers in their digital lifestyle.

Precise plans for growth

- Concentrate on drivable markets where most visitors live: PA, NC, VA, MD, NY, NJ. For VA, GA also ranks as a strong market.
- Stress the activities that appeal to everyone, such as *shopping, fine dining, beaches, and sightseeing*, but use *museums and art galleries* to lure the sophisticated, educated LGBT element and *nightclubs/dancing* to appeal to younger LGBT visitors.
- Promote multi-city vacations such as packages across cities (blend historic Williamsburg with DC or Philadelphia or a beach trip along the North Carolina and Virginia coasts, etc.).
- Provide extensive opportunities for visitors to use social media. The LGBT digital footprint as influencers, their interest in visiting friends, and their use of community for information, both on- and off-line, can make them strong ambassadors for a destination.

Region = VA, DC, MD, NC, PA



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Research segments

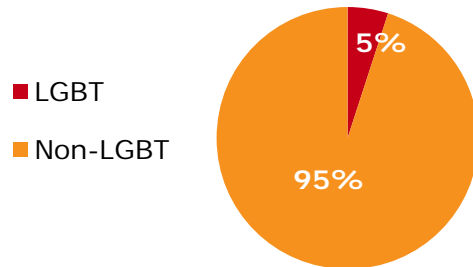
Specific segments of visitors:

- Total US travelers
- Total US LGBT travelers
- Total Region travelers (VA, DC, MD, NC, PA)
- Total Region LGBT travelers
- Total VA travelers
- Total VA LGBT travelers



Ethnic/Age profiles

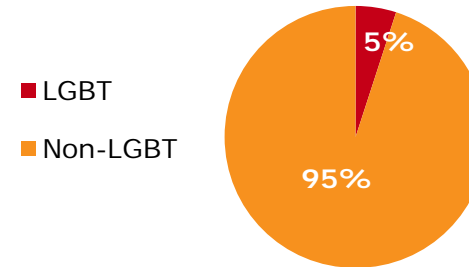
Marketing messages can be tailored to increase relevance for the LGBT target group. Compared to non-LGBT visitors to the region and to Virginia



Region*

- Younger (41 vs. 49)
- Fewer retirees (14% vs. 21%)
- Slightly higher incomes (\$82K vs. \$79K)
- Less likely married (45% vs. 58%)
- Most live in Mid- or South Atlantic (similar to non-LGBT)
- Similar to Non-LGBT, primarily visit for leisure, especially to visit friends/relatives
- Longer stays and more nights in paid lodging
- Spend somewhat more (\$541 vs. \$490)
- Very/extremely satisfied with visit (86% vs. 88%)
- Activities – more visit friends, fine dine, nightclub/dance, family reunions, and art galleries

Region* = VA, DC, MD, NC, PA



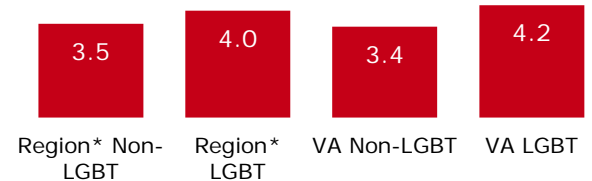
Virginia

- Even younger (37 vs. 50)
- Fewer retirees (10% vs. 24%)
- Slightly lower incomes (\$78K vs. \$81K)
- Far less likely married (29% vs. 61%) – impacts household income
- Most live in South Atlantic, although states vary from non-LGBT visitors
- Primarily leisure, but more business travel than Non-LGBT (18% vs. 13%)
- Longer stays and more nights in paid lodging
- Spend more, especially for accommodations
- Very/extremely satisfied with visit, but less than non-LGBT (85% vs. 89%)
- Activities – more visit friends AND relatives, sightsee, state parks, and nightclubs/ dancing

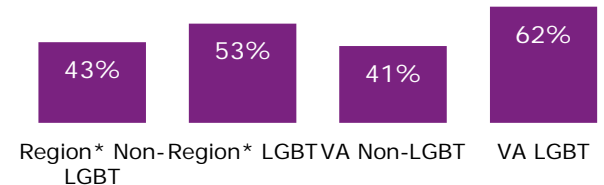
LGBT visitors stay longer and spend more

- Overnight Volume.** LGBT overnight stays exceed non-LGBT stays in both length and in usage of paid lodging (hotels/motels, B&Bs, rental homes/condos, timeshares), making them relatively lucrative tourists. Virginia gains even more from LGBT visitors than other areas within the region.

of Nights on Trip

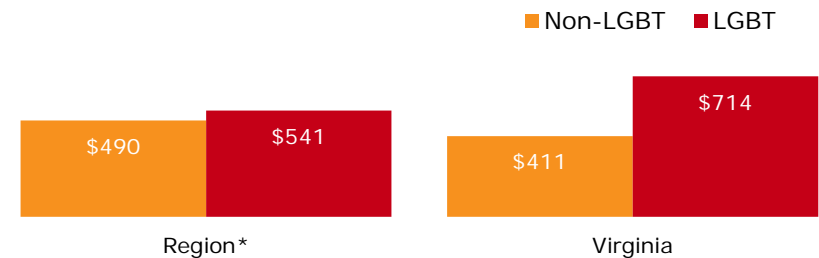


% Paid Accommodations



- Travel Spending.** LGBT visitors spend more than non-LGBT visitors, aided by the longer stays – especially Virginia visitors.

Average Spending



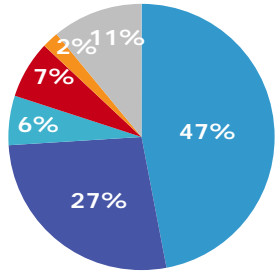
Region* = VA, DC, MD, NC, PA



From where they come, to where they go, and why

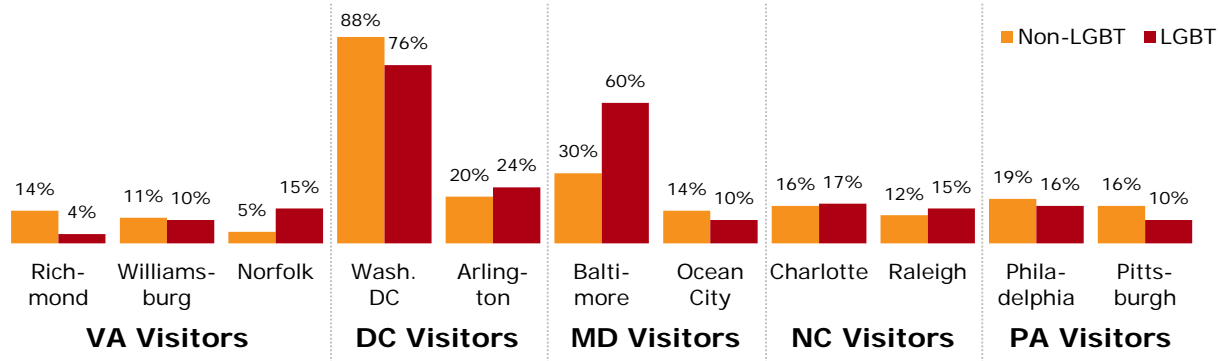
LGBT Region* Visitor Source

LGBT VA Visitor Source



■ **Source of Visitors.** Both Virginia and the region* draw heavily from South Atlantic states, particularly NC, VA, and MD. Mid-Atlantic states (PA, NY, NJ) feed the region* more than Virginia; Ohio tops East North Central sources, and Virginia pulls Texans from the West South Central area.

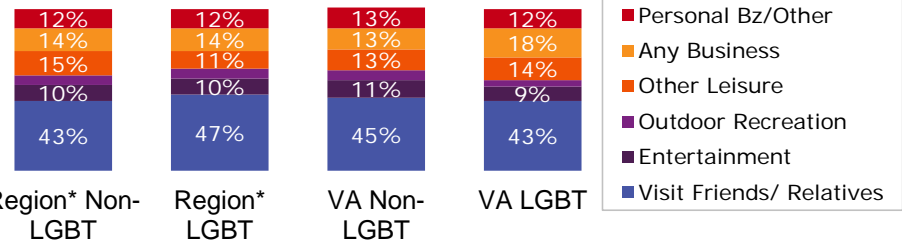
Visitor Destination by State in Region



■ **Destination of Visitors.** LGBT visitors sometimes choose very different destinations than non-LGBT visitors, particularly in VA (more choose Norfolk; fewer visit Richmond) and MD (far more likely to opt for Baltimore than Non-LGBT travelers).

■ **Trip Purpose.** Most visitors come for **Leisure** (70%-75%), dominated by visiting friends/relatives (41%). Virginia LGBT exceeds the other groups in traveling for **Business** (18% vs. 13%-14%).

Trip Purpose All Region Visitors CY 2014



Region* = VA, DC, MD, NC, PA



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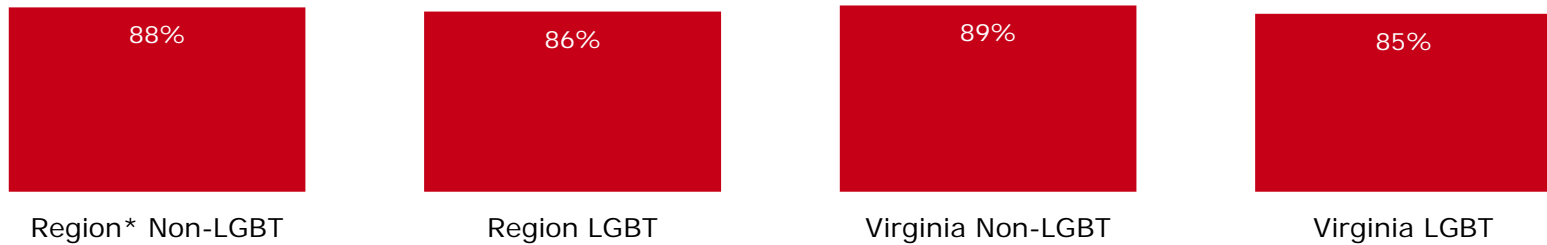
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The region* sends visitors home happy, especially non-LGBT visitors

- Almost nine in 10 claim high satisfaction with their trip to the region*. Although still very strong, Virginia LGBT visitors give slightly lower marks than non-LGBT visitors (85% vs. 89%).

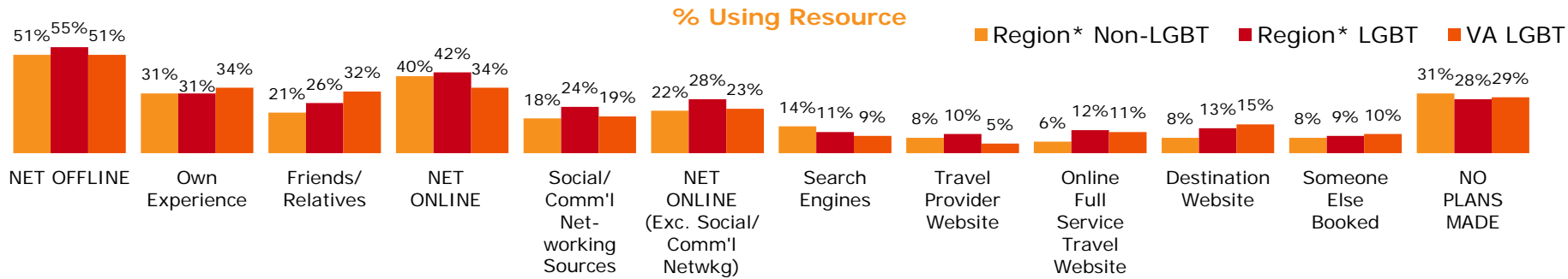
Percent Extremely/Very Satisfied



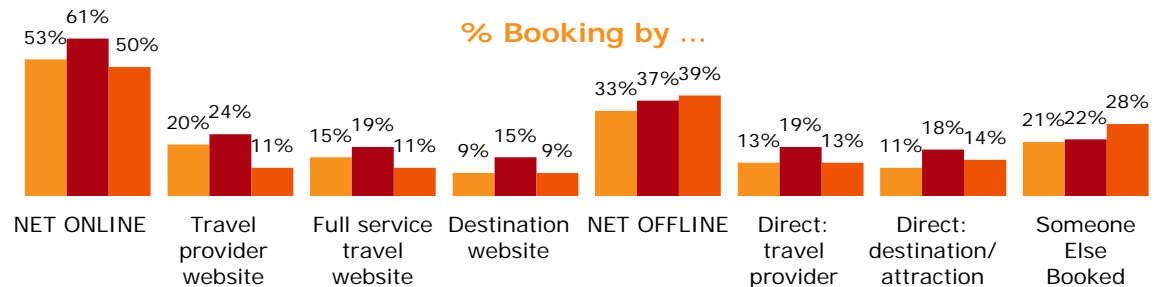
Region* = VA, DC, MD, NC, PA

Visitors rely on experience, online resources, and word of mouth to gather travel information

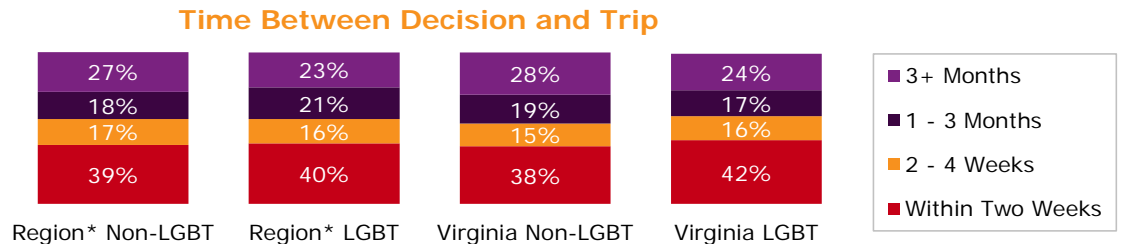
- **Gathering information.** Travelers most commonly rely on their own experience with input (both on and offline) from friends/relatives/networking sources.



- **Booking.** Most book online, as do half of LGBT travelers. Somewhat more LGBT travelers book offline, but also note that someone else booked the trip.



- **Travel Decisions.** The length of time between a decision and the trip varies little by LGBT/non-LGBT orientation.



Region* = VA, DC, MD, NC, PA



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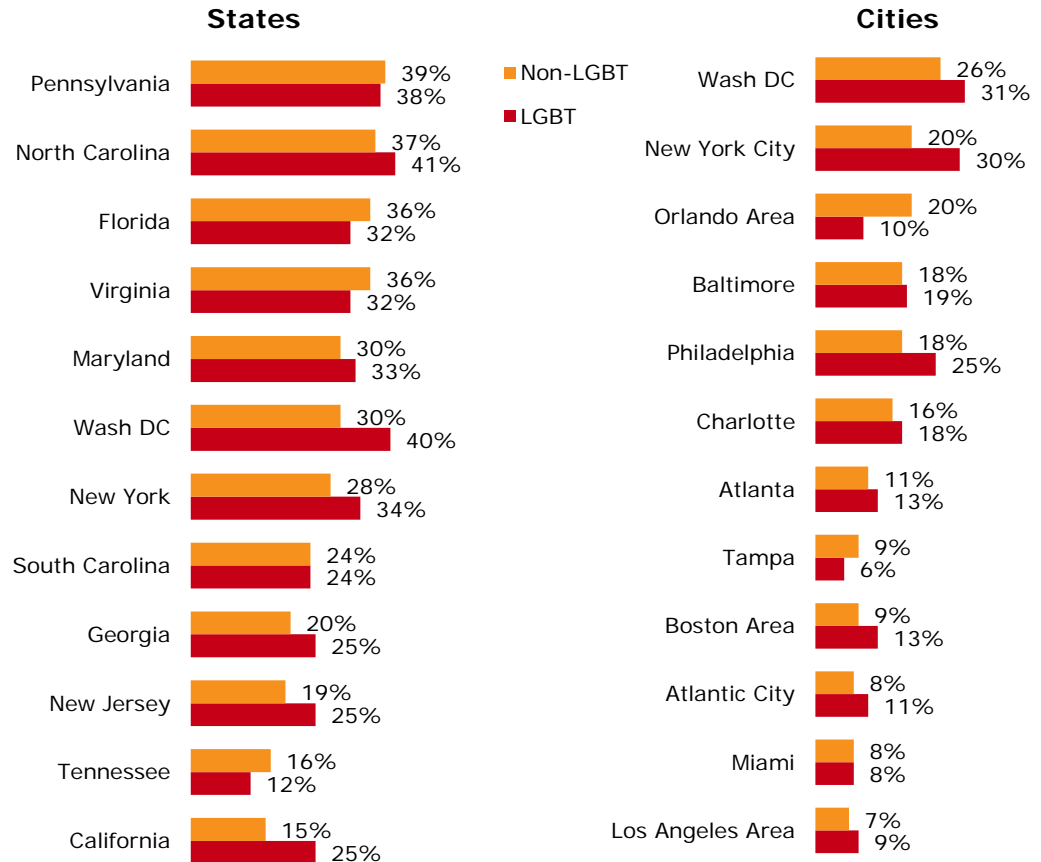
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Fiercest competition = Mid- and South Atlantic

■ **Competitors cluster along the Atlantic coast.** The top 10 destinations chosen by Region* visitors are all Mid- or South Atlantic states although LGBT travelers would reorder the top destinations, putting North Carolina and Washington DC at the top.

■ **Top cities (DMAs) visited reflect a similar pattern.** Only 12th place Los Angeles is outside the Mid/South Atlantic area. LGBT travelers rank the cities similarly, although they give a stronger emphasis to New York City and Philadelphia and less to family-oriented Orlando.

Other Top Areas Visited by Region* Visitors in Past 3 Years

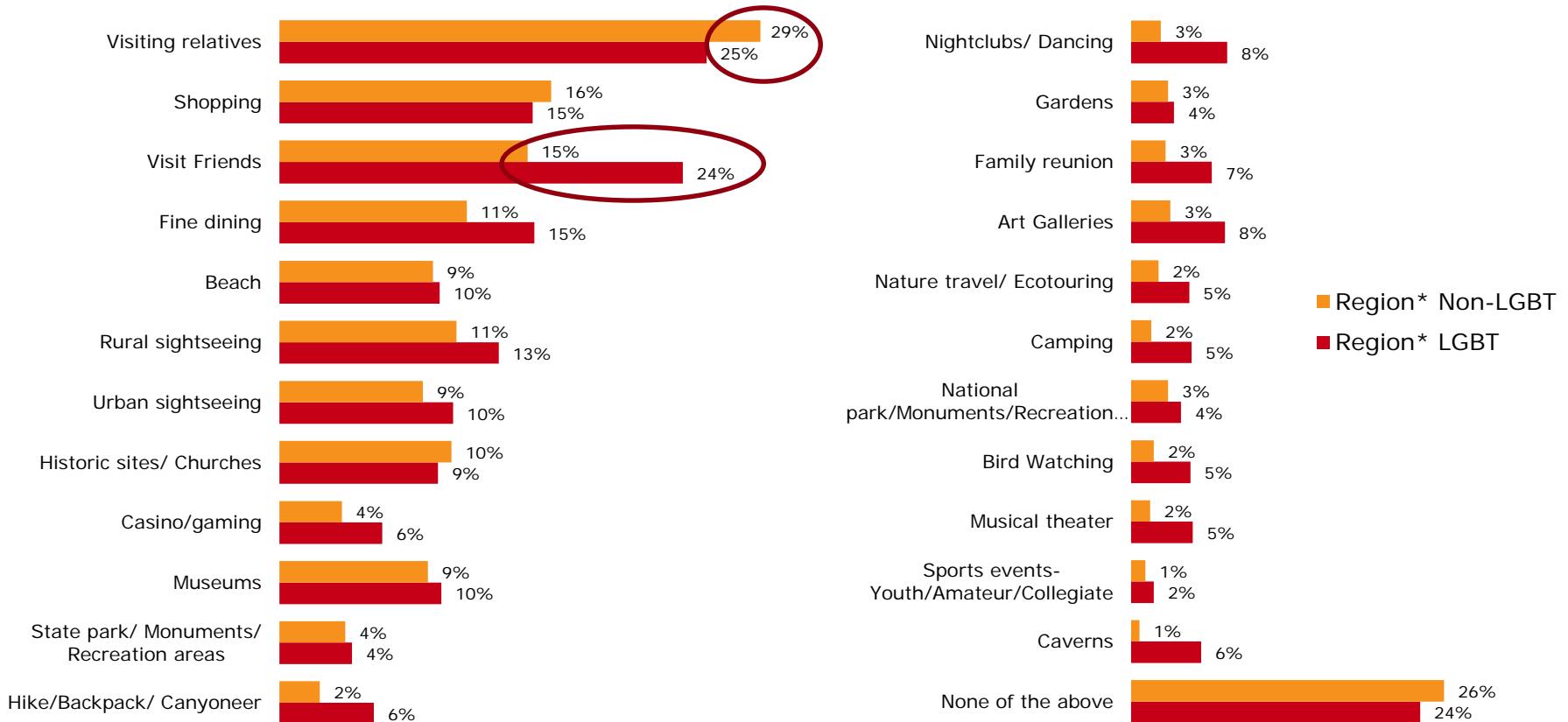


Region* = VA, DC, MD, NC, PA

Visitors come to visit, shop, eat, and relax

■ Compared to regional* non-LGBT visitors, LGBT travelers more strongly emphasize several activities: they see their friends as much as relatives, enjoy fine dining, sightsee, hike, go to nightclubs/dance, and make several sophisticated choices such as art galleries and musical theatre.

Activities Participated/Attractions Visited



Region* = VA, DC, MD, NC, PA



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1

Appendix: Results of the Research



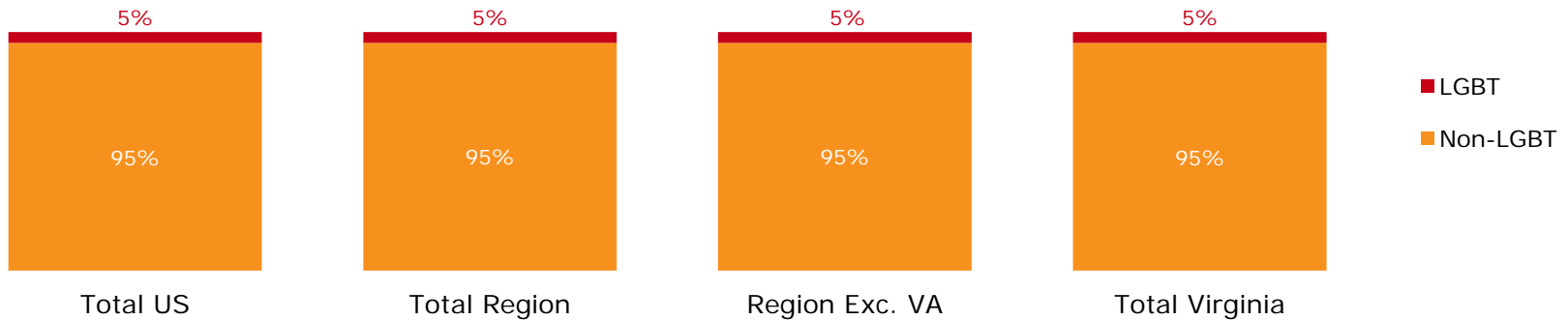
2

Visitor Volume and Origins



LGBT consistently represents nearly 5% of visitors

Proportion of LGBT by Area
Market Overview (Person-Trips)



Region*: VA, DC, MD, NC, PA

Q4a. Please indicate the US state(s) visited (Person Trips) (day or overnight trip)



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Destinations: top areas visited in each state

Each state has a key city or two that attract the most visitors:

- Virginia: Richmond leads overall, but LGBT visitors more often choose Norfolk and seldom Richmond
- Washington DC: Both groups primarily stay in DC itself
- Maryland: Baltimore hosts the most visitors for both groups, but doubles the share of LGBT compared to non-LGBT
- North Carolina: Several cities attract both groups, but Greensboro and Winston/Salem draws more LGBT visitors
- Pennsylvania: Philadelphia leads, especially among LGBT; Pittsburgh does not draw LGBT as successfully.

Top Destinations by Region

% Visitors Selecting Area (5%+ Each State Ranked)

Total VA Visitors	Non-LGBT	LGBT	Total DC Visitors	Non-LGBT	LGBT	Total MD Visitors	Non-LGBT	LGBT	Total NC Visitors	Non-LGBT	LGBT	Total PA Visitors	Non-LGBT	LGBT
Base (<i>unwtd</i>):	1,960	70		556	27		1,266	47		2,799	118		3,350	120
Richmond	14%	4%	Wash DC	88%	76%	Baltimore	30%	60%	Charlotte	16%	17%	Phila-delphia	19%	28%
Williams-burg	11	10	Arlington*	20	24	Ocean City	14	10	Raleigh	12	15	Pittsburgh	16	10
Virginia Beach	9	4	Alexandria*	15	6	Annapolis	9	6	Asheville	11	12	Lancaster	7	9
Alexandria	6	2	Bethesda	8	--	Silver Spring	6	--	Wilmington	7	4	Poconos	7	8
Charlottes-ville	6	9	College Park	6	--	Frederick	6	10	Outer Banks	7	7	Harrisburg	6	10
Fairfax	6	2				Bethesda	5	4	Durham	6	3	Scranton/ Wilkes- Barre	5	3
Arlington	6	--							Greensboro	6	15	Hershey	5	3
Fredericks-burg	5	3	* Many DC visitors travel to Virginia because of the close proximity						Winston/ Salem	5	15	Erie	5	2
Norfolk	5	15								Fayetteville	5	5	Allentown	5

Note: Respondents may select more than one destination (percentages may sum to more than 100%); not all destinations are listed
Q4d. Please indicate the cities/places visited in state . . . (State Level – demo wtd.)



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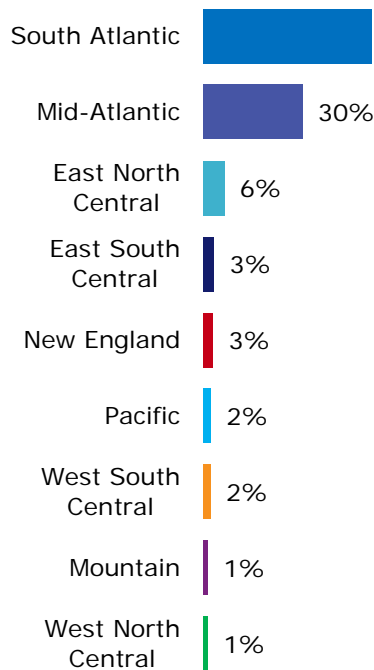
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Most region* visitors live South- or Mid-Atlantic states

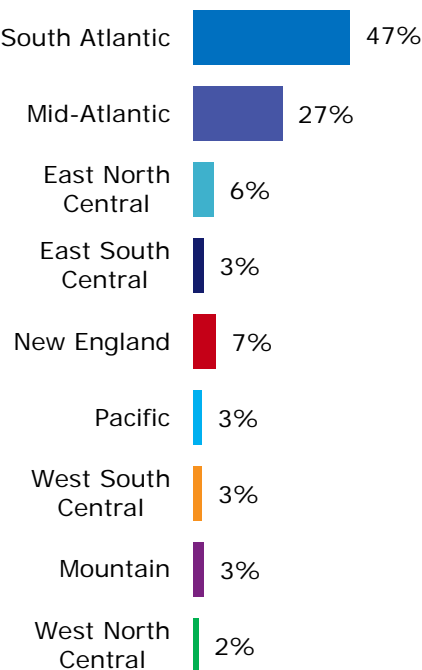
- LGBT visitors more likely come from Virginia and less likely from North Carolina; otherwise, the source markets are roughly similar.

Source of Region* Visitors by Census Region

Base: Non-LGBT Visitors

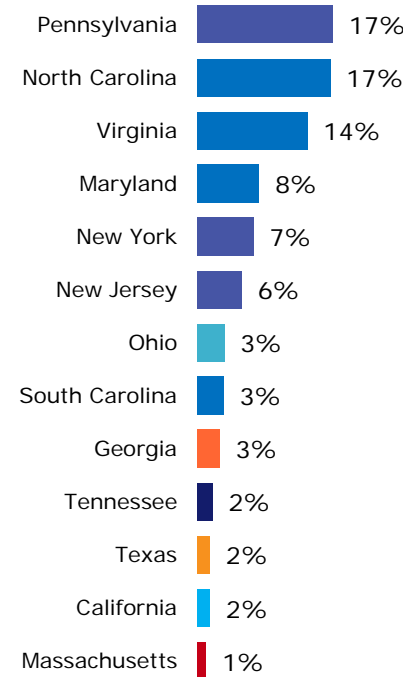


Base: LGBT Visitors

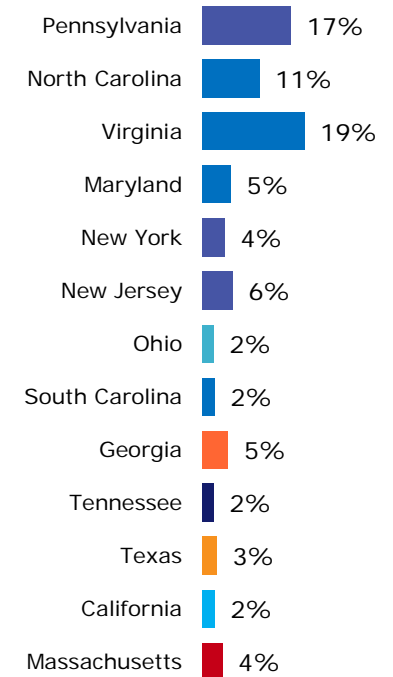


Source of Region* Visitors by Top States

Base: Non-LGBT Visitors



Base: LGBT Visitors



* VA, DC, MD, NC, PA

Panel: State/Region residence of those who visited Region/Virginia (Household Level-demo wtd)



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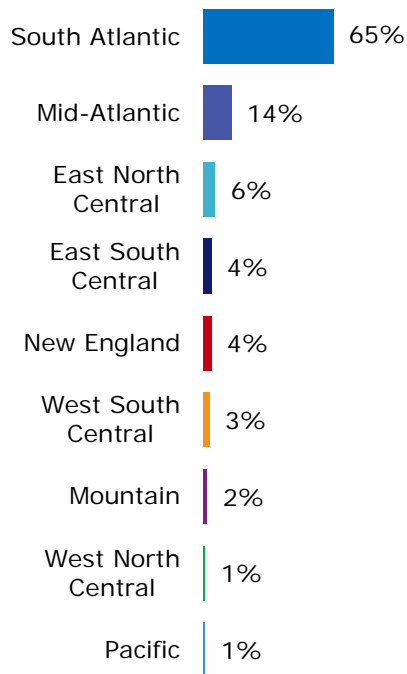
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Most Virginia visitors live South Atlantic states

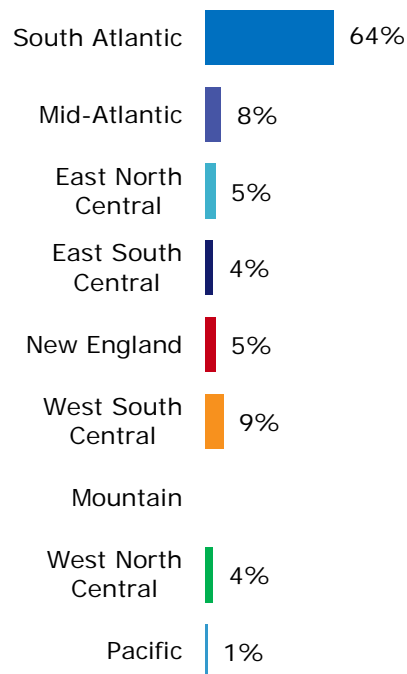
- Of the top 5 source markets, LGBT visitors more likely come from Virginia and Maryland and less likely from North Carolina, Pennsylvania, and New York.

Source of Region* Visitors by Census Region

Base: Non-LGBT Visitors

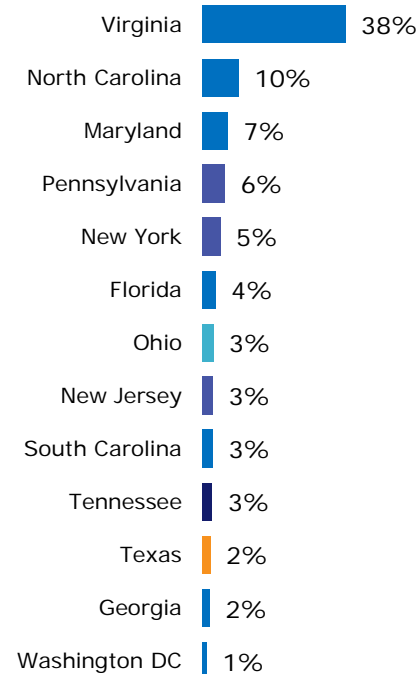


Base: LGBT Visitors

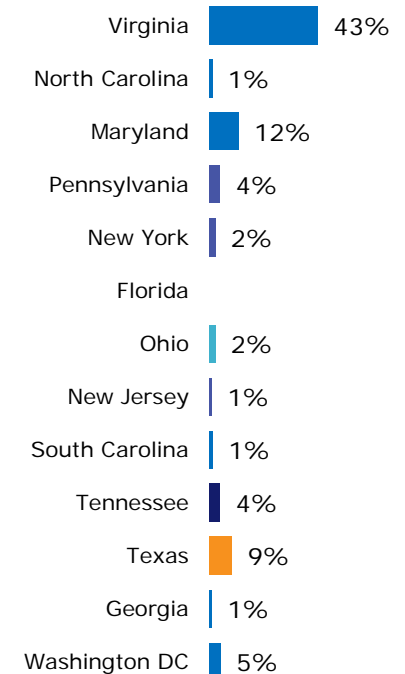


Source of Region* Visitors by Top States

Base: Non-LGBT Visitors



Base: LGBT Visitors



* VA, DC, MD, NC, PA

Panel: State/Region residence of those who visited Region/Virginia (Household Level-demo wtd)



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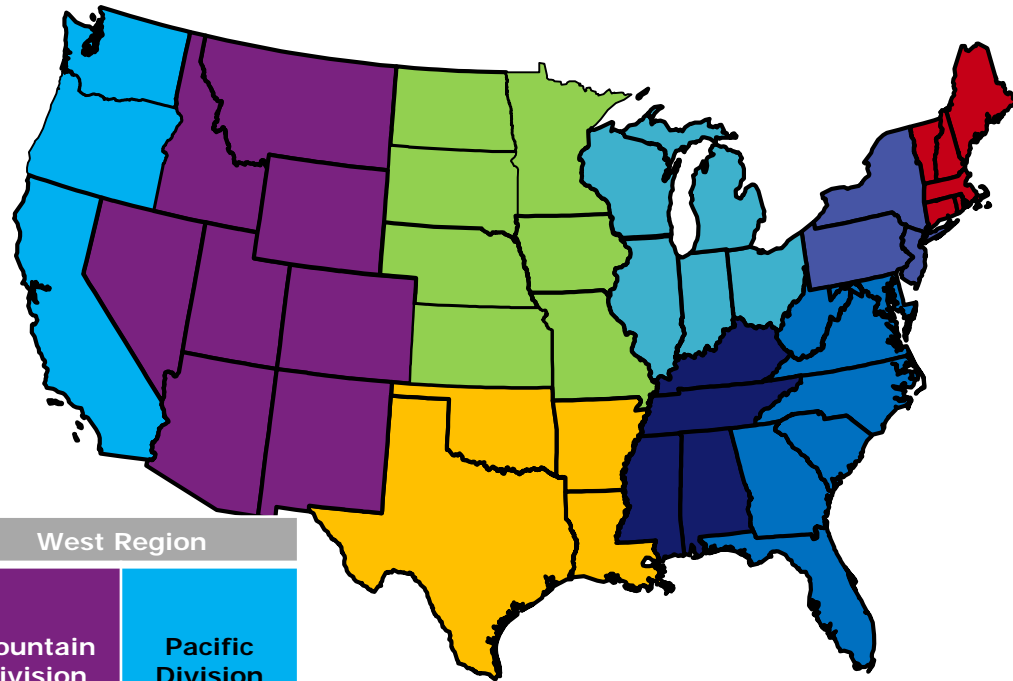
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Geography (Census Region State Composition)

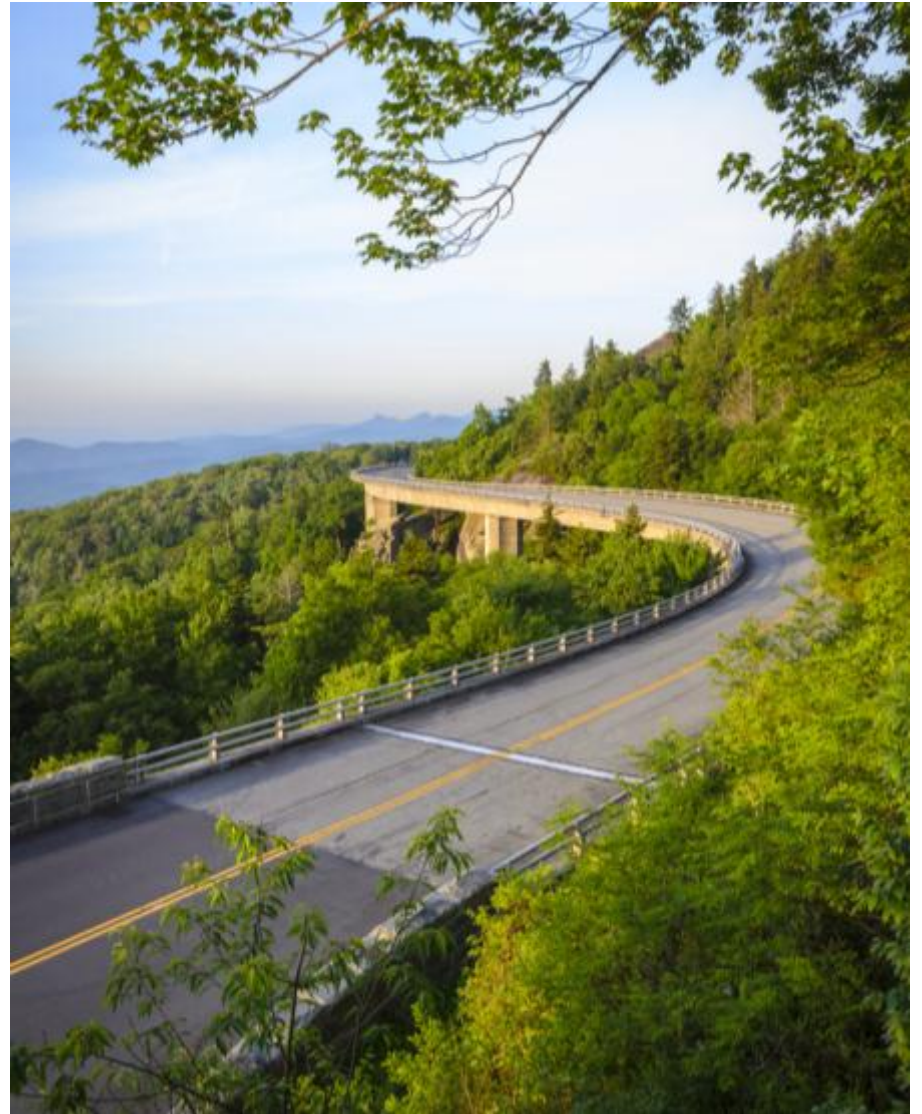
- States within regions: use as a reference for prior slide.

Northeast Region		South Region				
New England Division	Mid Atlantic Division	South Atlantic Division	East South Central Division	West South Central Division		
CT	NJ	DL	AL	AR		
ME	NY	DC	KY	LA		
MA	PA	FL	MS	OK		
NH		GA	TN	TX		
RI		MD	North Central Region		West Region	
VT		NC	East North Central Division	West North Central Division	Mountain Division	Pacific Division
		SC	IL	IA	AZ	CA
		VA	IN	KS	CO	OR
		WV	MI	MN	ID	WA
			OH	MO	MT	
			WI	NE	NV	
				ND	NM	
				SD	UT	
					WY	



3

Visitor Demographics



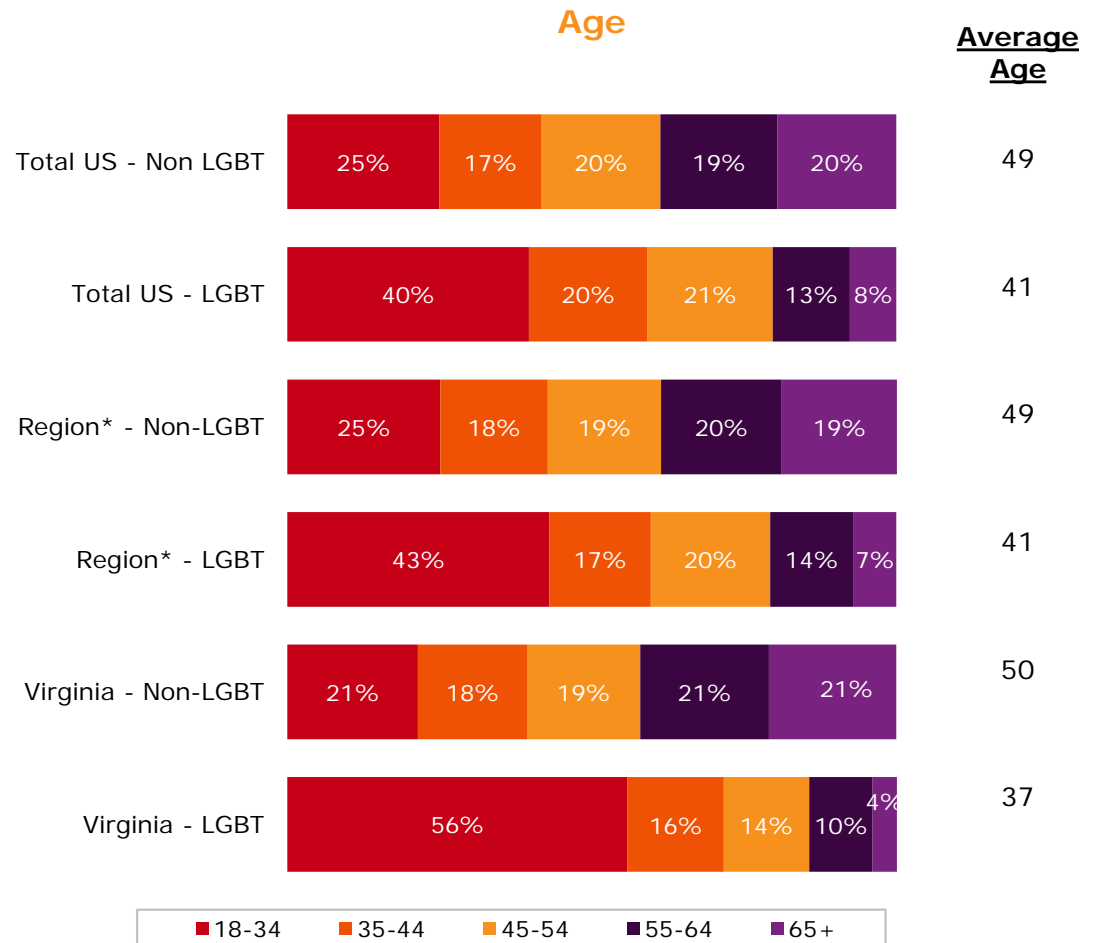
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Younger travelers show much higher willingness to identify as LGBT, especially Virginia visitors

- Region* visitor age groups closely resemble that of total US travelers.



* VA, DC, MD, NC, PA

QD: How old are you? (Household Level-demo wtd)



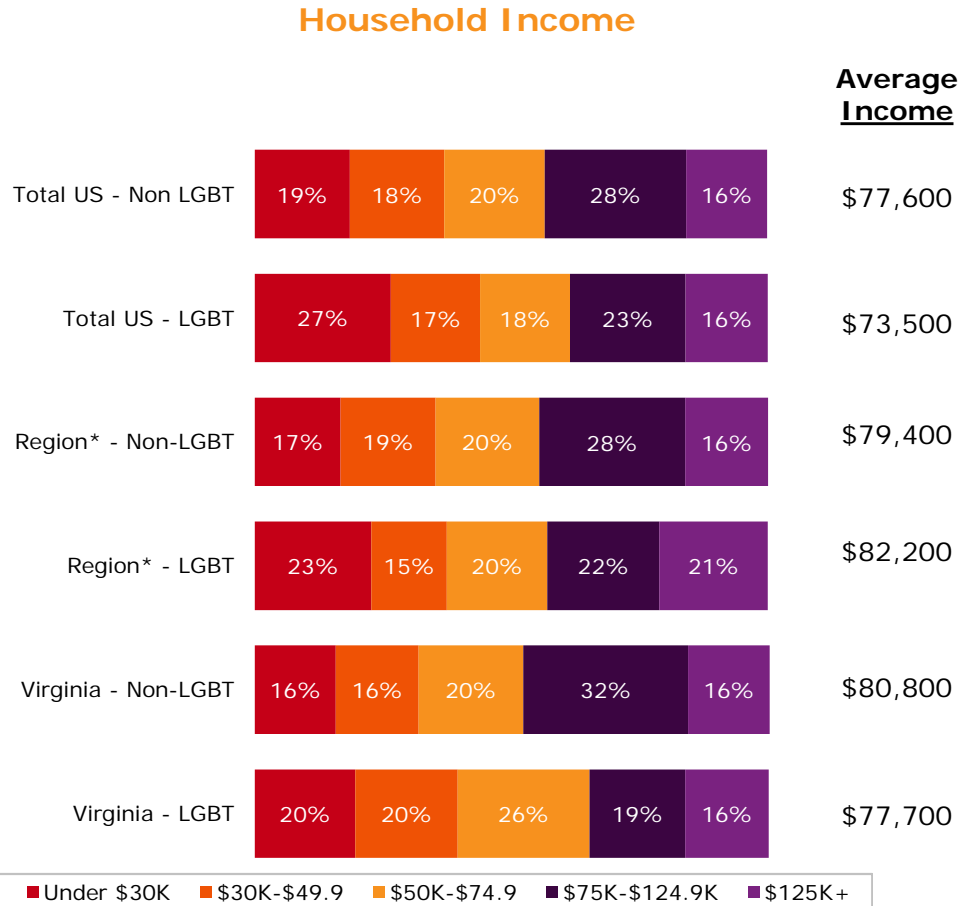
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LGBT region* visitors note slightly higher incomes than Non-LGBT visitors, but both hover near \$80,000

- In contrast, total US and Virginia LGBT visitors report slightly lower incomes than non-LGBT visitors
- Region* visitors (both LGBT and non-LGBT) report slightly higher incomes than overall US travelers.



* VA, DC, MD, NC, PA

Panel: Income (Household Level-demo wtd)



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Far fewer LGBT region* visitor households are married or live with children than non-LGBT visitors

- Fewer LGBT visitors live in larger households; about the same live with one other; more live alone
- Ethnicity has little impact except fewer Virginia LGBT visitors claim to be African-American
- The household makeup by region varies little from total US travelers.

Gender, Marital Status, Household Composition, Ethnicity

Other Demographics	Total US Non-LGBT	Total US LGBT	Region* Non-LGBT	Region* LGBT	Virginia Non-LGBT	Virginia LGBT
% Male	29%	43%	30%	48%	34%	54%
% Married	59	40	58	45	61	29
Household Composition						
% One Person	22%	30%	22%	26%	21%	32%
% Two People	38	40	37	41	39	32
% Three or More	40	30	41	33	40	37
% With Children < 18	27	18	26	17	26	14
Ethnicity						
% Caucasian	87%	85%	87%	86%	86%	86%
% African-American	5	6	7	4	9	3
% Hispanic	4	6	2	4	2	3

QE: Please indicate your gender.

Panel: Marital Status, Household Members, Children, Ethnicity. (Household Level-demo wtd)

* VA, DC, MD, NC, PA



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Slightly more LGBT than Non-LGBT visitors graduated college, but being younger, far fewer have retired

Employment, Education

Other Demographics %	Total US Non-LGBT	Total US LGBT	Region* Non-LGBT	Region* LGBT	Virginia Non-LGBT	Virginia LGBT
Employment						
% Full Time	53%	57%	54%	55%	53%	59%
% Retired	21	13	21	14	24	10
% Part Time	10	11	10	10	9	11
Education						
% 4 yr College Grad +	52%	54%	55%	59%	57%	61%

* VA, DC, MD, NC, PA

Panel: Employment, Education (Household Level-demo wtd)



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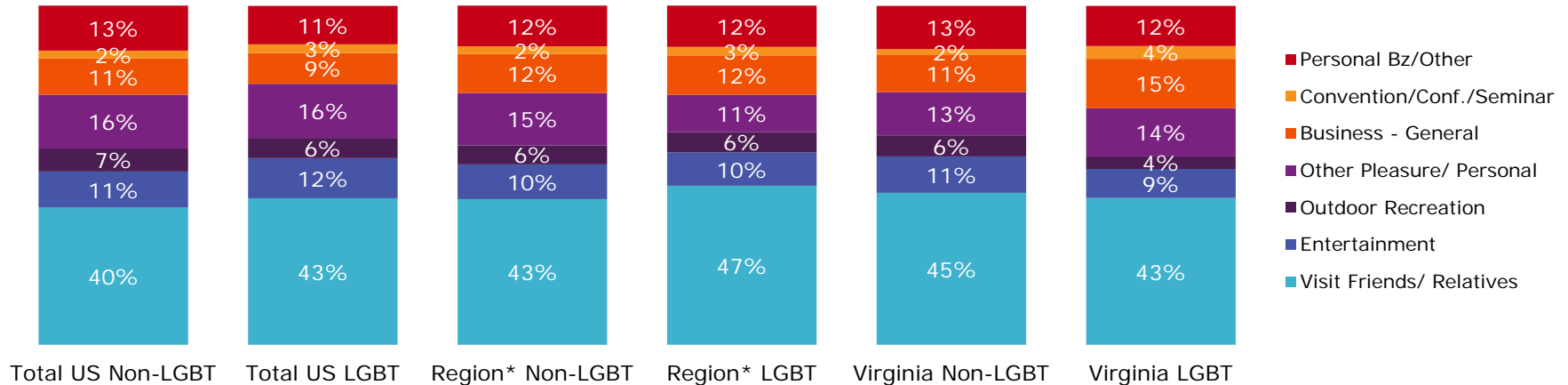
Trip Characteristics and Satisfaction



Visitors usually come to the region* for fun

- LGBT travelers tend to cite leisure travel reasons more often than non-LGBT visitors, except for Virginia LGBT visitors, who cite business travel a bit more often than others
- Even more than Total US Travelers (40% Non-LGBT; 43% LGBT), most visitors primarily come to the region* to *visit friends and family* (43% Non-LGBT; 47% LGBT).

Primary Purpose of Trip



74%
13%

77%
12%

74%
14%

74%
14%

75%
13%

70%
18%

= Net Leisure
= Net Business

* VA, DC, MD, NC, PA

Q1b. Which of the following was the primary purpose of your trip. . . (Trip Level – demo wtd)



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LGBT visitors more likely travel solo, without children, and stay a little longer than others

Primary Purpose and Accommodations

- Most travel for leisure and most drive, regardless of sexual orientation
- LGBT visitors stay a little longer – usually in hotels/motels.

Trip Choices	Total US Non-LGBT	Total US LGBT	Total Region* Non-LGBT	Total Region* LGBT	VA Non-LGBT	VA LGBT
PRIMARY PURPOSE						
NET Leisure/Personal	74%	77%	74%	74%	75%	70%
Visit Friends/Relatives	40	43	43	47	45	43
Entertainment/Sightsee	11	12	10	10	11	9
NET Business	13	12	14	14	13	18
Personal Bs/Other	13	11	12	12	13	12
PRIMARY MODE						
% Own Auto/Truck	76%	73%	78%	77%	80%	84%
% Air Travel	14	14	11	10	9	5
AVG # TRAVEL PARTY						
% Traveling Solo	28%	34%	29%	36%	28%	41%
% Traveling in Pairs (1 other)	40	39	40	37	40	31
% Traveling w/ Children	24	17	23	15	25	12
Lodging						
AVG # NIGHTS (if any)	3.5	3.7	3.5	4.0	3.4	4.2
Private Home	1.5	1.5	1.6	1.5	1.7	1.3
Hotel/Motel	1.3	1.4	1.2	1.6	1.1	2.6
All Other	0.7	0.9	0.6	0.9	0.6	0.3

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation?

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+.
(Trip Level – demo wtd)

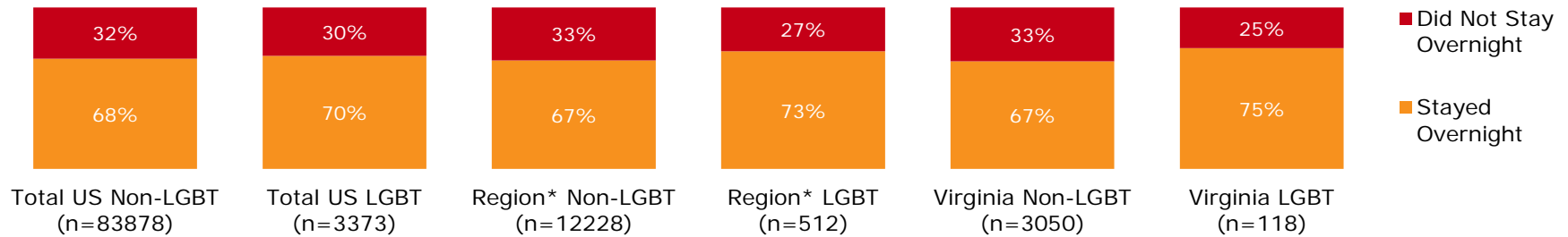
Q4f: Please specify the number of nights stayed at each listed accommodation (State Level – demo wtd).

* VA, DC, MD, NC, PA



Somewhat more so than non-LGBT region* visitors, LGBT visitors stay at least one night

Day vs. Overnight – By SEGMENT



Q4e. Please specify which visits included at least one overnight stay (State Level – demo wtd)

* VA, DC, MD, NC, PA



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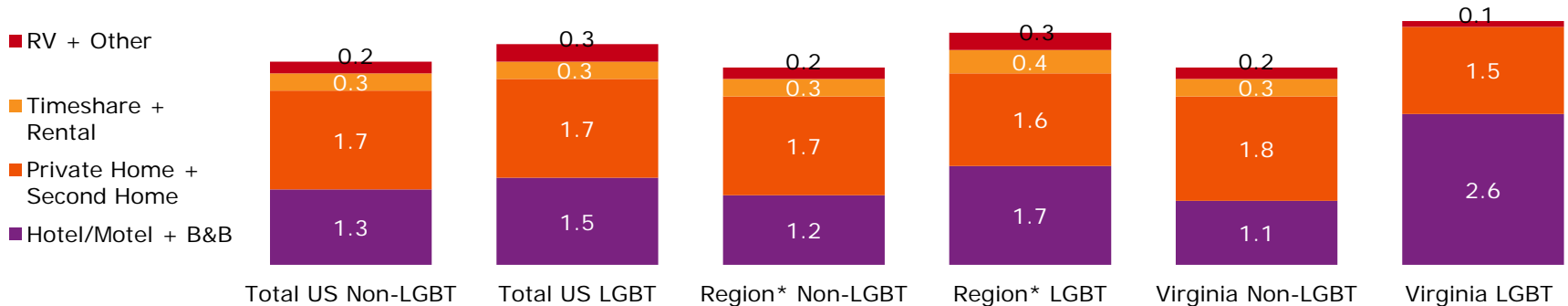
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About half of LGBT region* visitors pay for lodging, especially Virginia visitors

- LGBT visitors stay longer and more choose paid accommodations than non-LGBT visitors
- Virginia LGBT visitors stay longer than average region* visitors and most (62%) pay for lodging.

Length of Stay
Base: Overnight Visitors



Average # of Nights:

	Total US Non-LGBT	Total US LGBT	Region* Non-LGBT	Region* LGBT	Virginia Non-LGBT	Virginia LGBT
Total	3.5	3.7	3.5	4.0	3.4	4.2
Paid*	1.6	1.8	1.5	2.1	1.4	2.6
% Paid/Total	46%	49%	43%	53%	41%	62%

* Hotel/Motel/B&B/Rental Home/Rental Condo/Time Share

* VA, DC, MD, NC, PA

Q4f. Abridged: Of the overnights, specify the number stayed at each accommodation (State Level)



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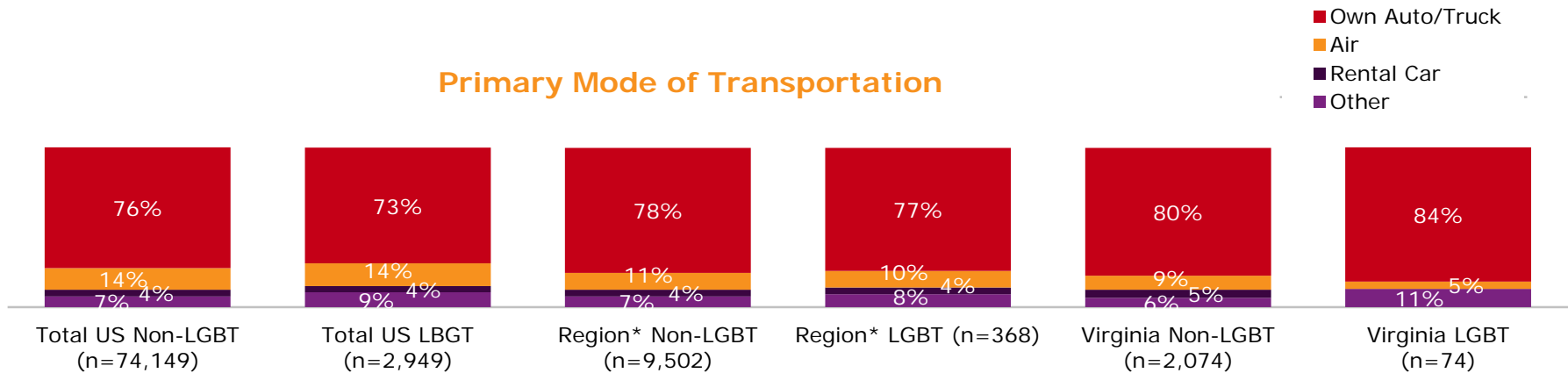
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VIRGINIA IS FOR LOVERS

Most travelers drive to their destination

- Virginia visitors fly less often than others, especially LGBT visitors.

Primary Mode of Transportation



* VA, DC, MD, NC, PA

Q2b. Abridged: Which was the primary mode of transportation used for your trip . . . (Household Level – demo wtd)



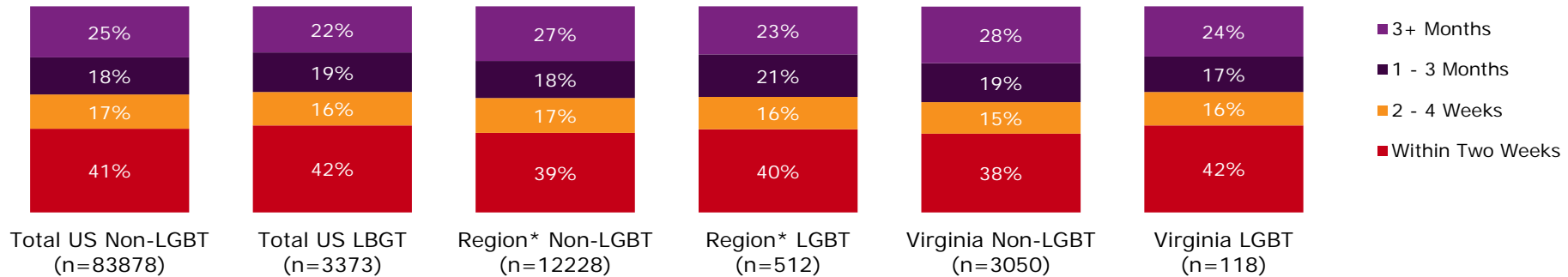
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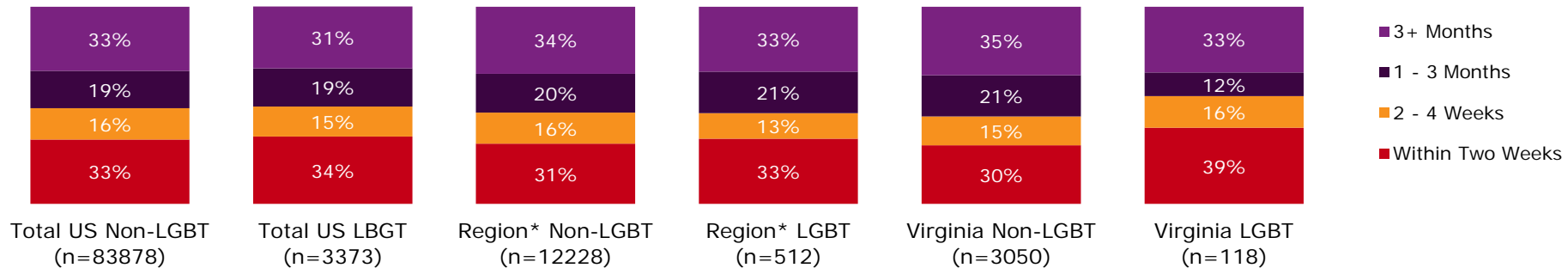
VIRGINIA IS FOR LOVERS

Logical patterns occur for trip planning, with little impact from LGBT/Non-LGBT orientation

Time Decided On Trip Before Visit to Area



Time Considered Trip Before Visit to Area



* VA, DC, MD, NC, PA

Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)



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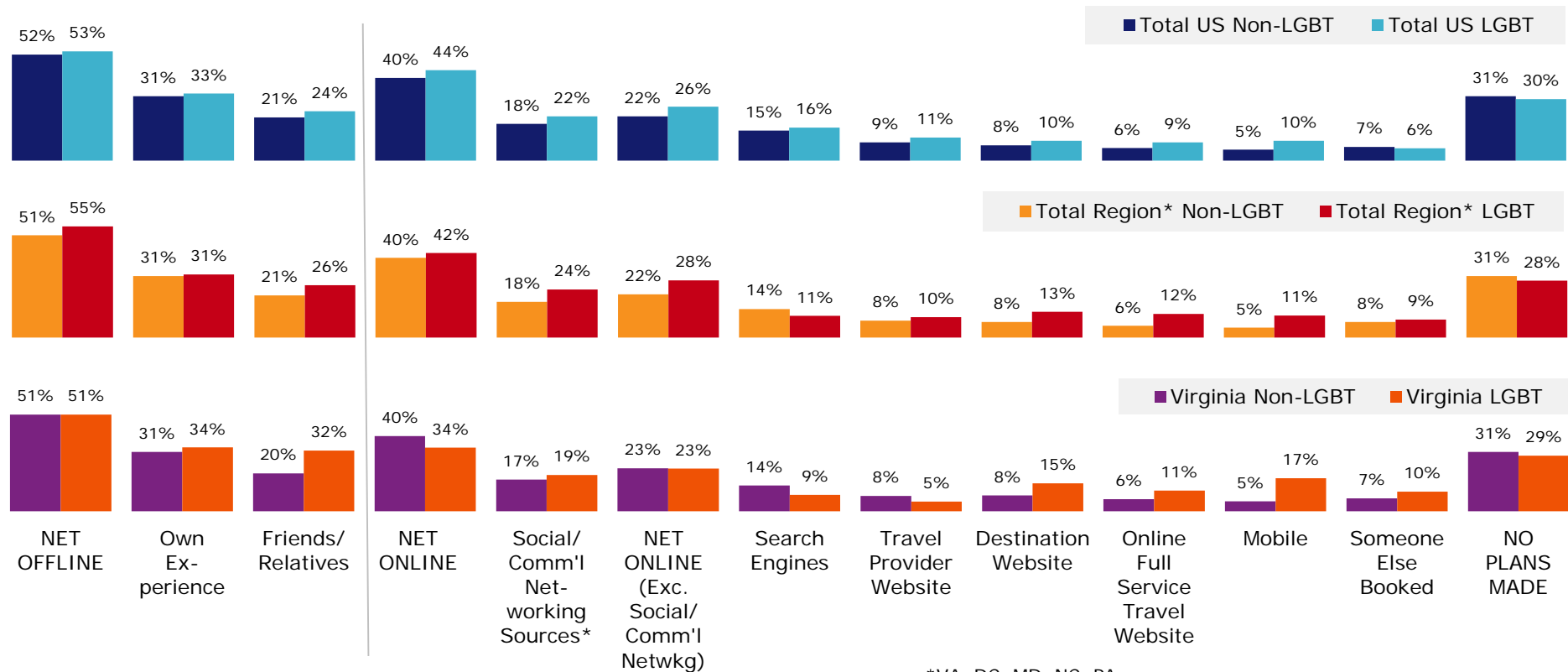
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VIRGINIA IS FOR LOVERS

LGBT travelers consistently rely on input from others, both on- and off-line (friends/relatives, social/commercial networking)

- More of them also visit destination websites and gather information through mobile devices.

Information Sources to Plan a Trip Ranked by Total US Non-LGBT



Q4j. Sources used to plan trip to . . . (State Level – demo wtd)

*VA, DC, MD, NC, PA

Networking Sources: Pinterest, Facebook, Travel Review Sites, etc.



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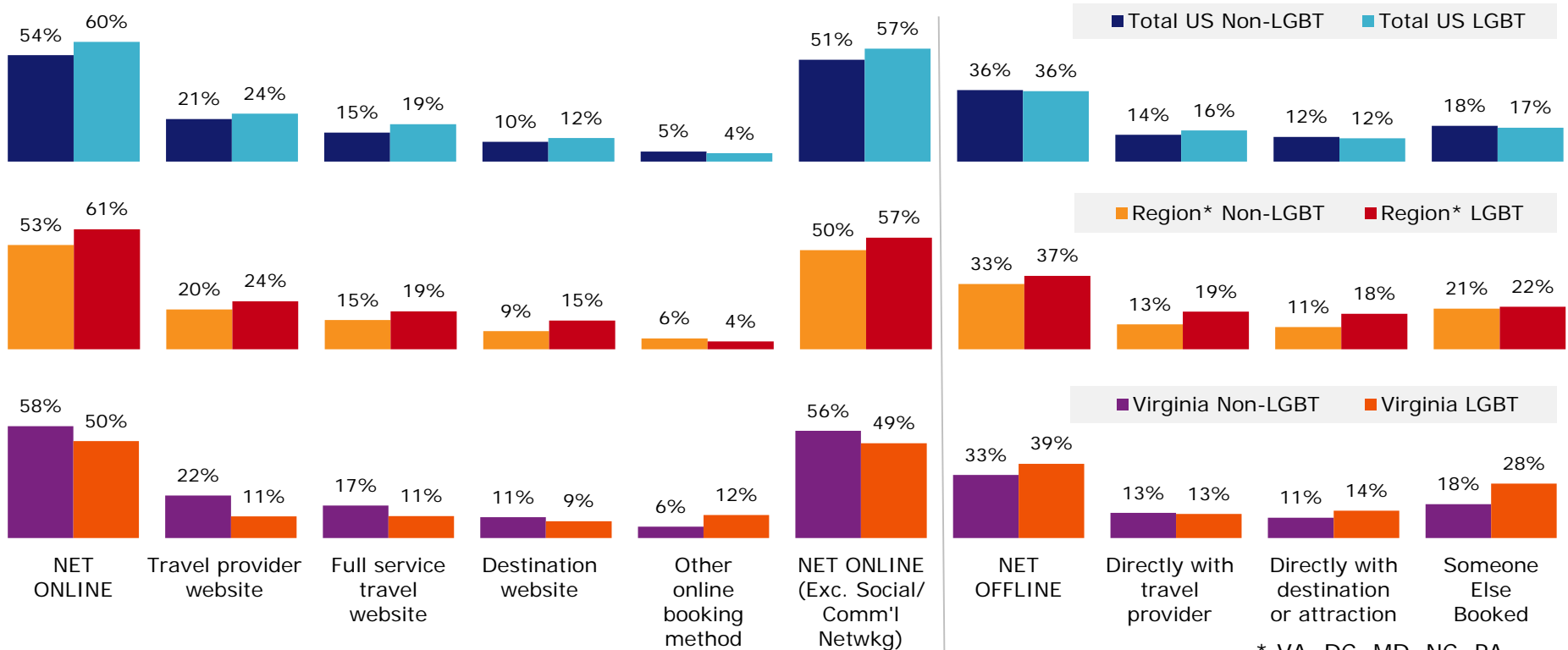
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VIRGINIA IS FOR LOVERS

Most book online, slightly higher for LGBT travelers

- While Virginia LGBT visitors also book online more often than offline, more book offline than non-LGBT travelers. Since many drive to Virginia, they may be more local and more familiar with various destinations and attractions.

Method Used to Book Trip Components
Ranked by Total US Non-LGBT



Q4k. Please indicate the method(s) you used to book your trip . . . (State Level – demo wtd)

* VA, DC, MD, NC, PA



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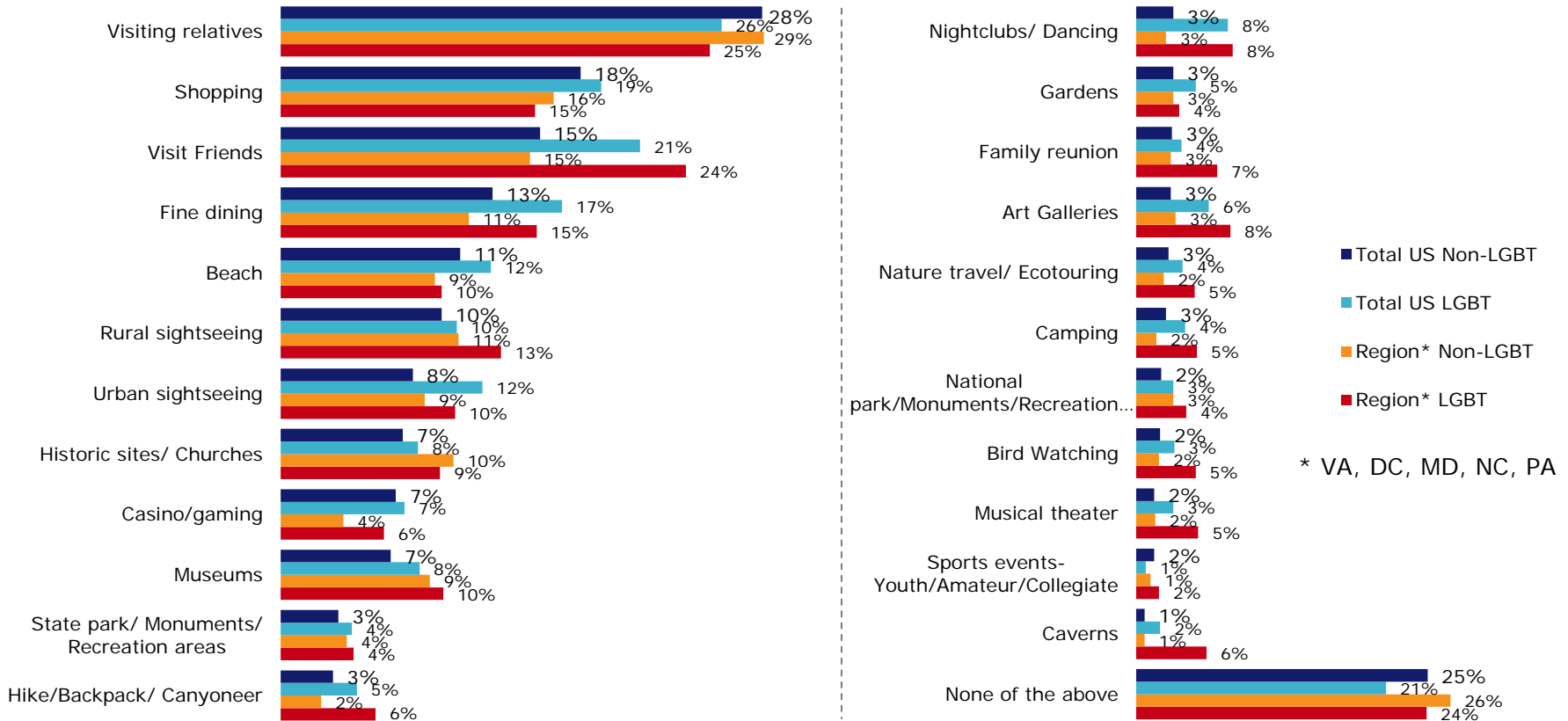
VIRGINIA IS FOR LOVERS

Visitors come to visit, shop, eat, and relax

■ LGBT visitors see their friends as much as relatives, in contrast to non-LGBT visitors. They also more often opt for fine dining, sightseeing, nightclubs/dancing, hiking, and art galleries.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Total US Non-LGBT



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)



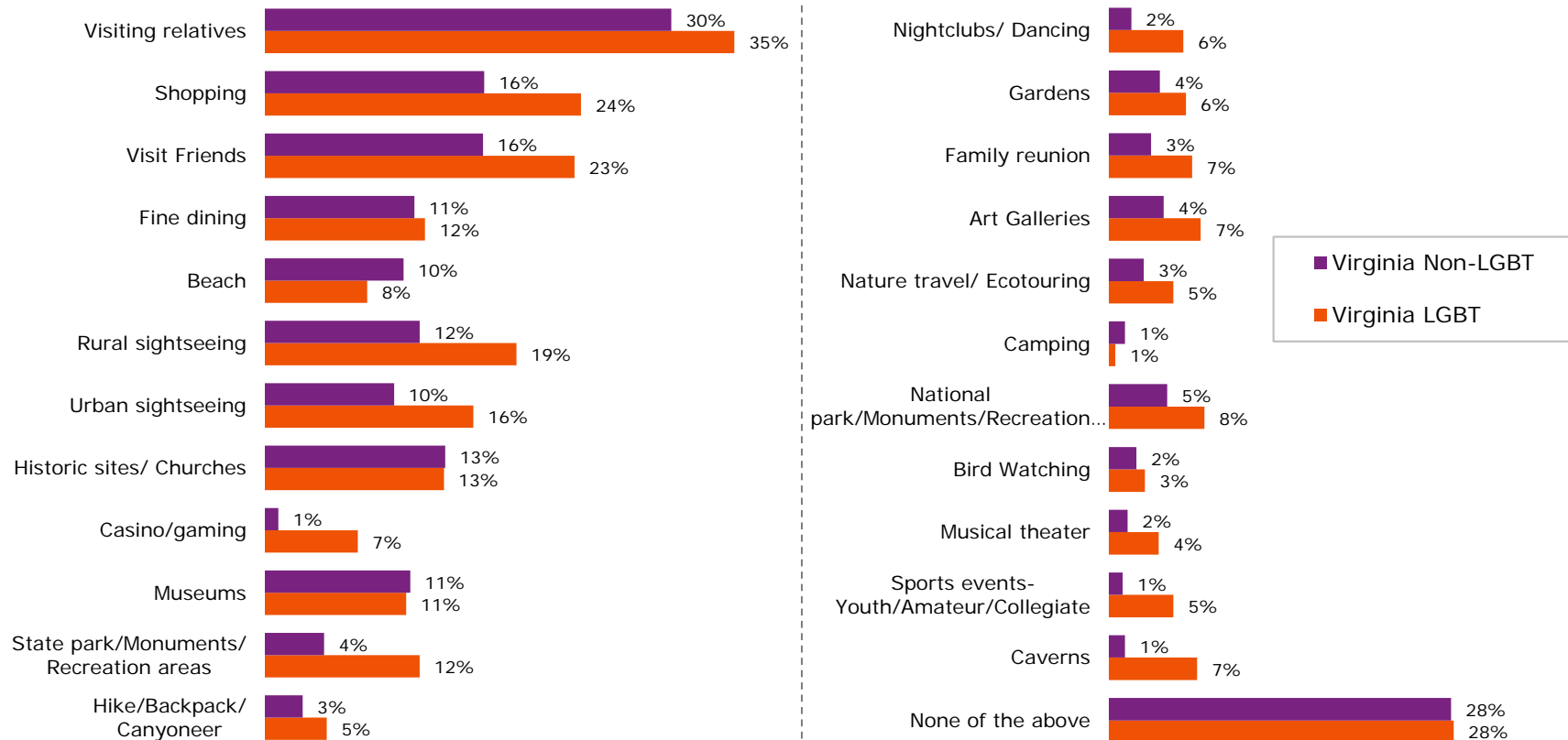
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VIRGINIA IS FOR LOVERS

LGBT Virginia visitors emphasize visiting both *friends* and *relatives*, *shopping*, and all types of *sightseeing*

Activities Participated/Attractions Visited
 % Participated/Visited – Ranked by Total US Non-LGBT



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)



January 2014 – March 2015 Virginia
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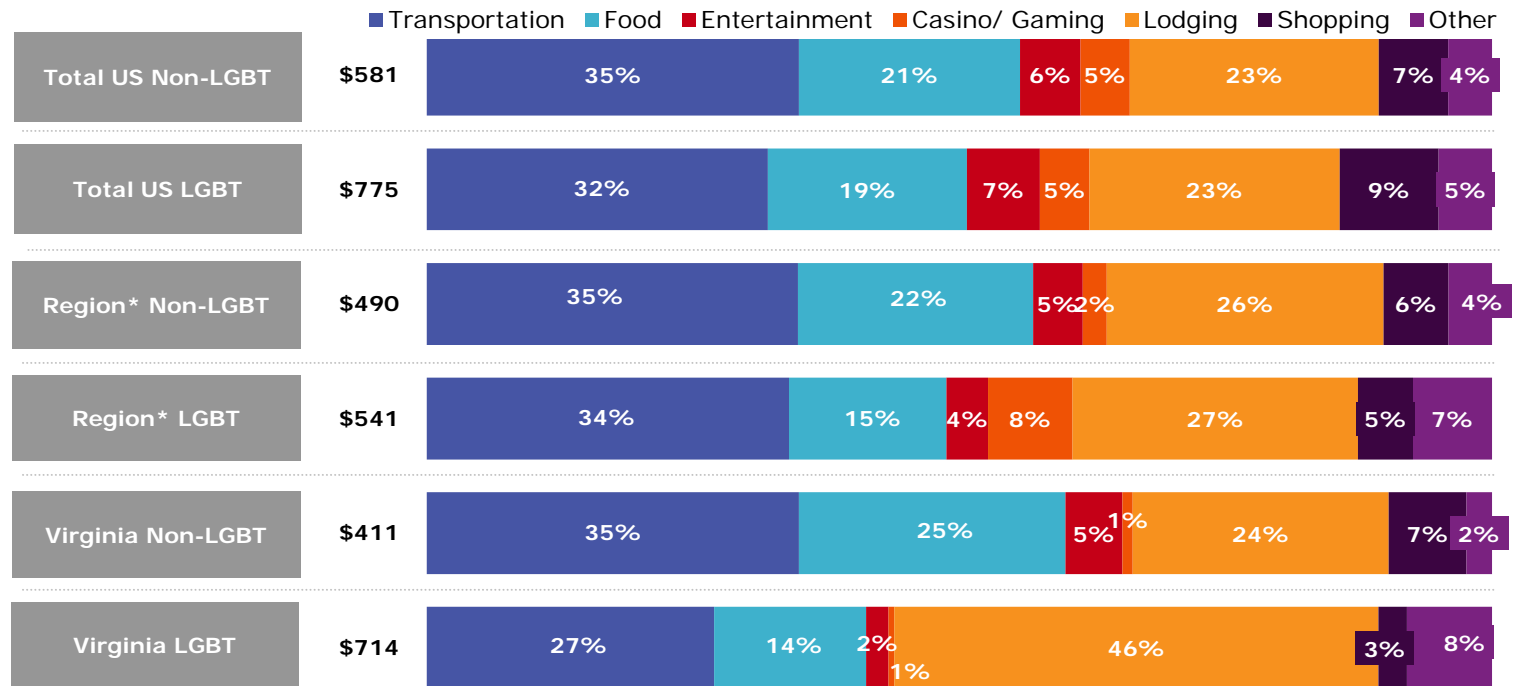
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VIRGINIA IS FOR LOVERS

LGBT travelers spend more than non-LGBT travelers

- Generally, each travel group spends roughly similar proportions on each spending category
- However, lodging boosts Virginia LGBT visitors spending levels, consistent with their tendency to stay longer and in paid accommodations.

Average Spending by Group
Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.

Note 2: Not all respondents classified as business or leisure (personal business and other)

Q4g. Please indicate the total dollar amount spent by your travel party (all) for . . . (State Level-demo wtd)

* VA, DC, MD, NC, PA



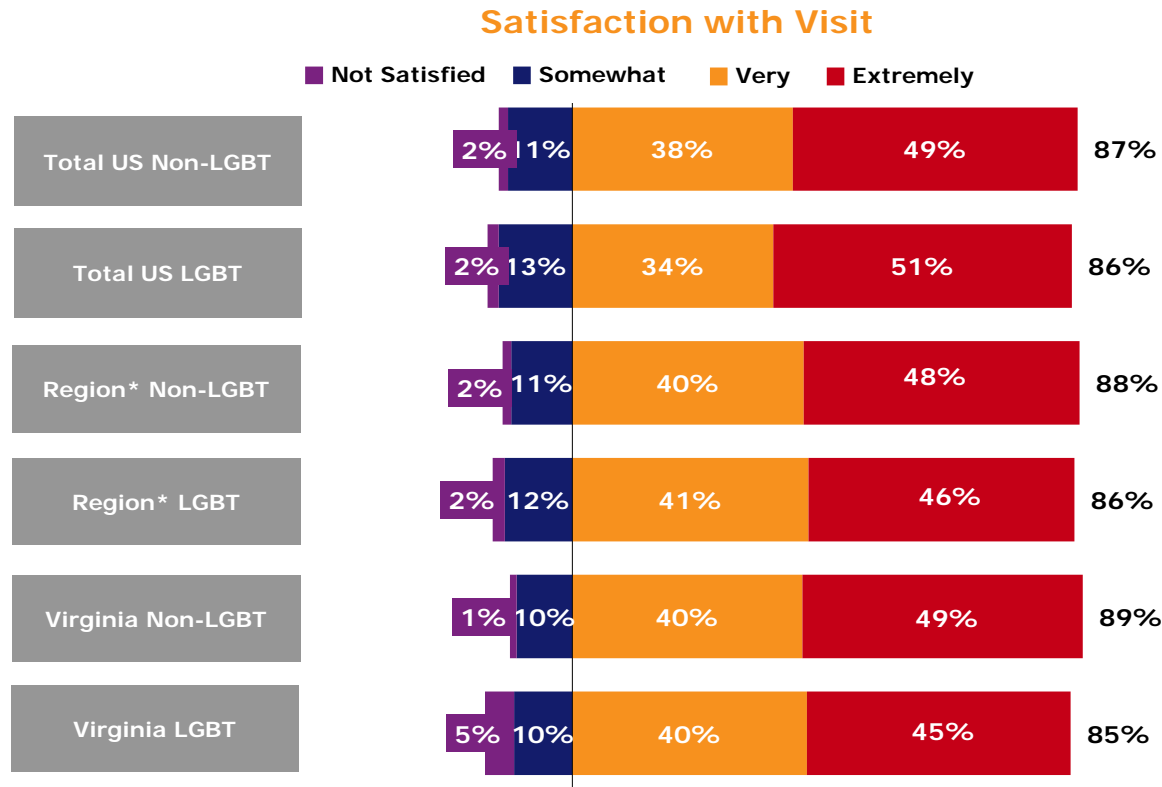
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Most visitors return home happy

- Only minor satisfaction differences appear among various visitors
- Although Virginia LGBT visitors seem slightly more critical than others, they still report very strong overall satisfaction.



*Note: Not Satisfied includes Not At All and Not Very Satisfied
 Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with ... (State Level-demo wtd.)

* VA, DC, MD, NC, PA



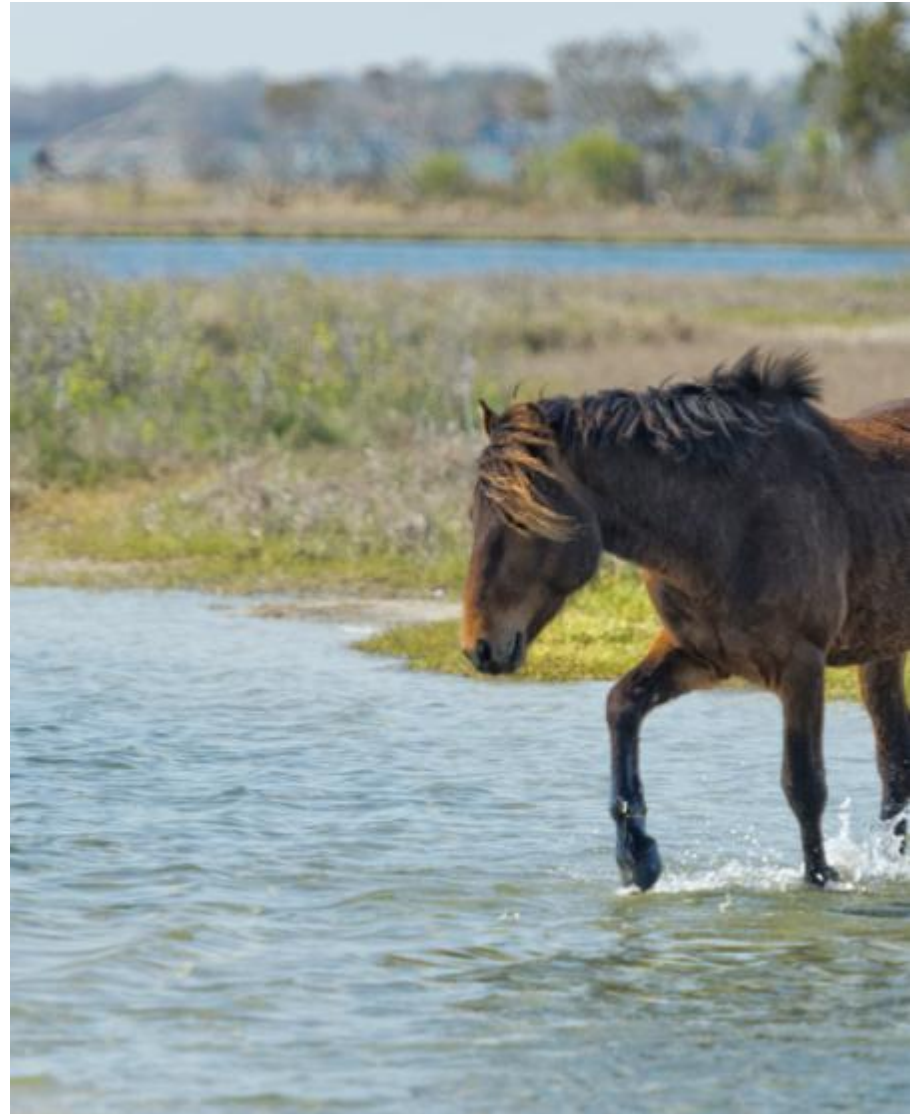
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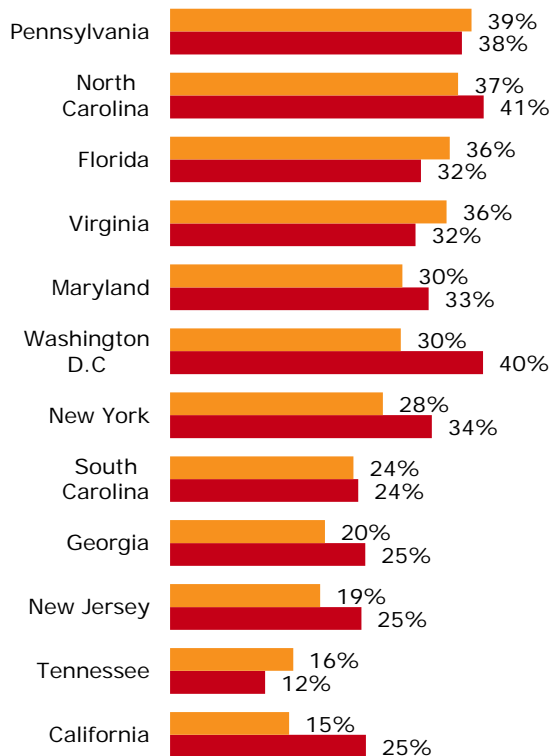
Competitive States



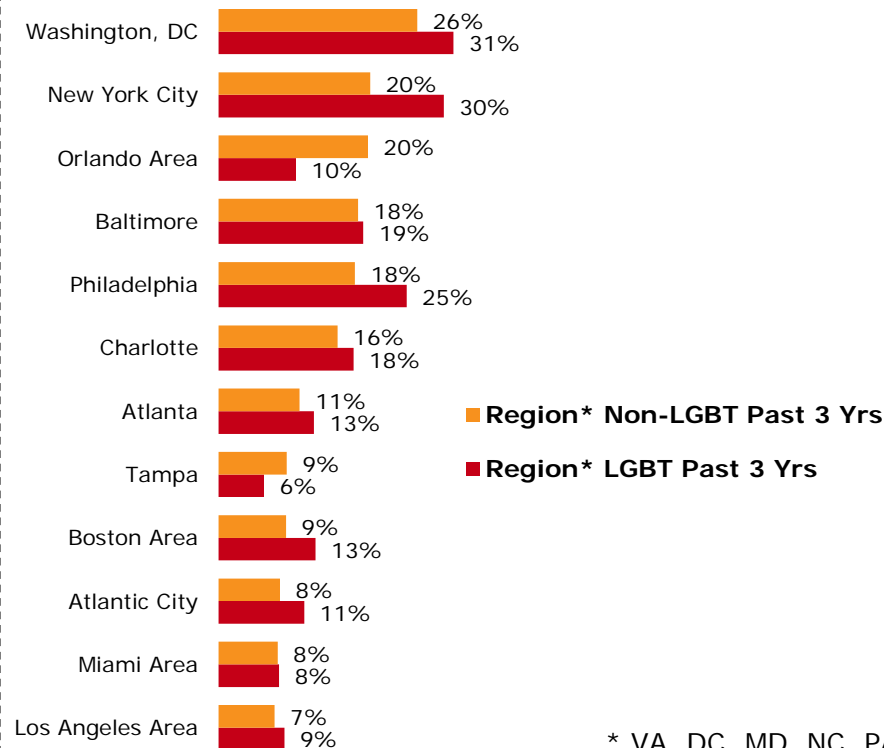
While generally similar to Non-LGBT choices, LGBTs more often add DC, NY, and CA as top competitors to the region*

Other Areas Visited by Region* Visitors (Key Competitors) % Visiting State/DMA Past Three Years (Ranked)

Top States
Base: Visited Region* (Household Level)



Top Cities
Base: Visited Region* (Household Level)



Q7a: Please indicate US states visited for leisure in past three years. Repeated for cities in Q8 series. (Household Level)



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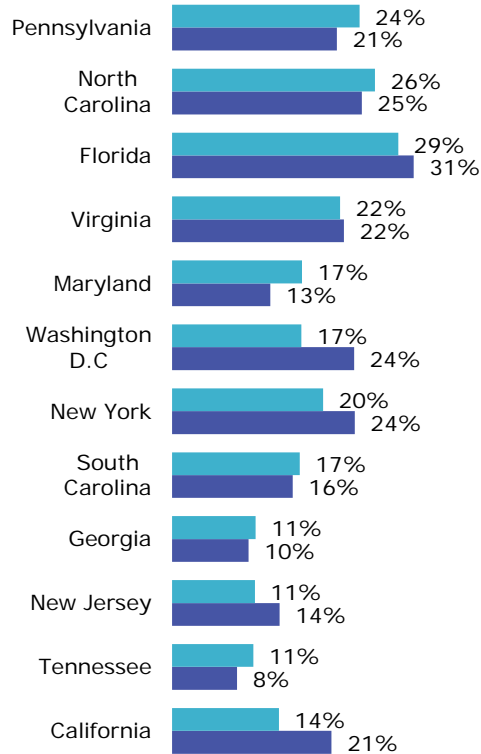
VIRGINIA IS FOR LOVERS

Following the pattern of past trips, future intent shows that LGBTs more often expect to visit DC, NY, and CA than Non-LGBT

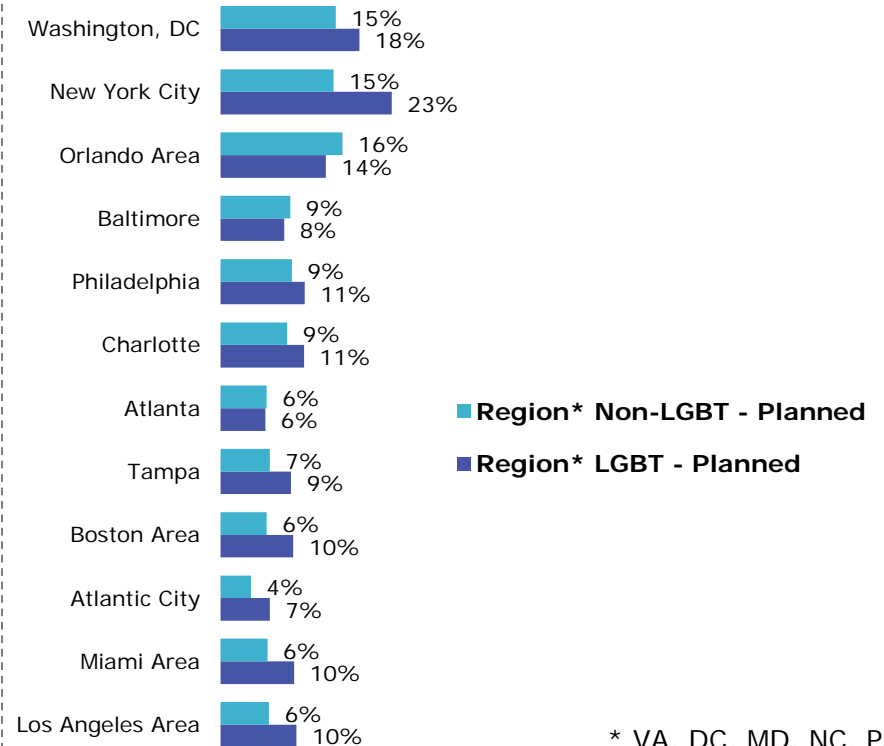
Other Areas Planned to Visit in Next 2 Years by Region* Visitors (Key Competitors)

% Planned to Visit (Top States/DMA's) Next Two Years (Ranked by Past Three Years)

Top States
Base: Visited Region* (Household Level)



Top Cities
Base: Visited Region* (Household Level)



Q7c: Which US states plan to visit within the next two years for leisure? Repeated for cities in Q8 series. (Household Level)

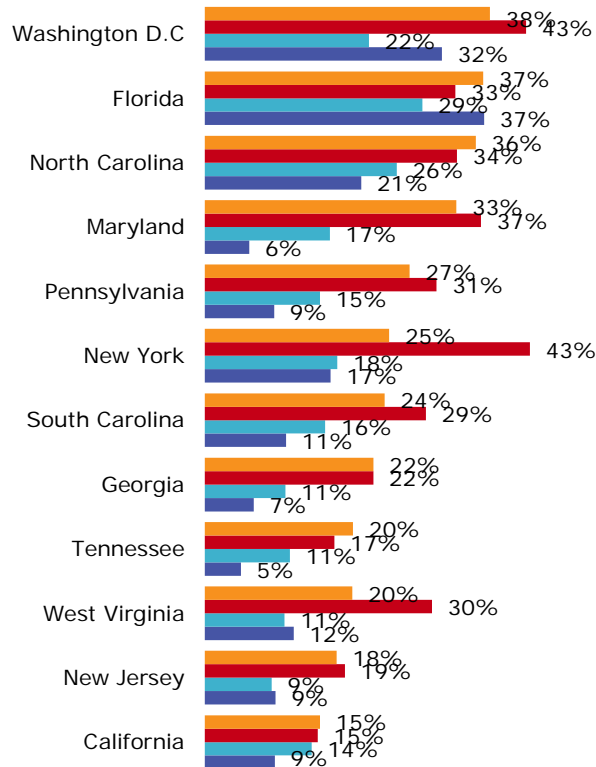
LGBT visitors cite DC and NY as top competitors to VA; further, more of them visit NY, SC, and WV than Non-LGBT visitors

Other Areas Visited by Virginia Visitors (Key Competitors)

% Visiting State/DMA Past Three Years (Ranking), Planned Next Two Years

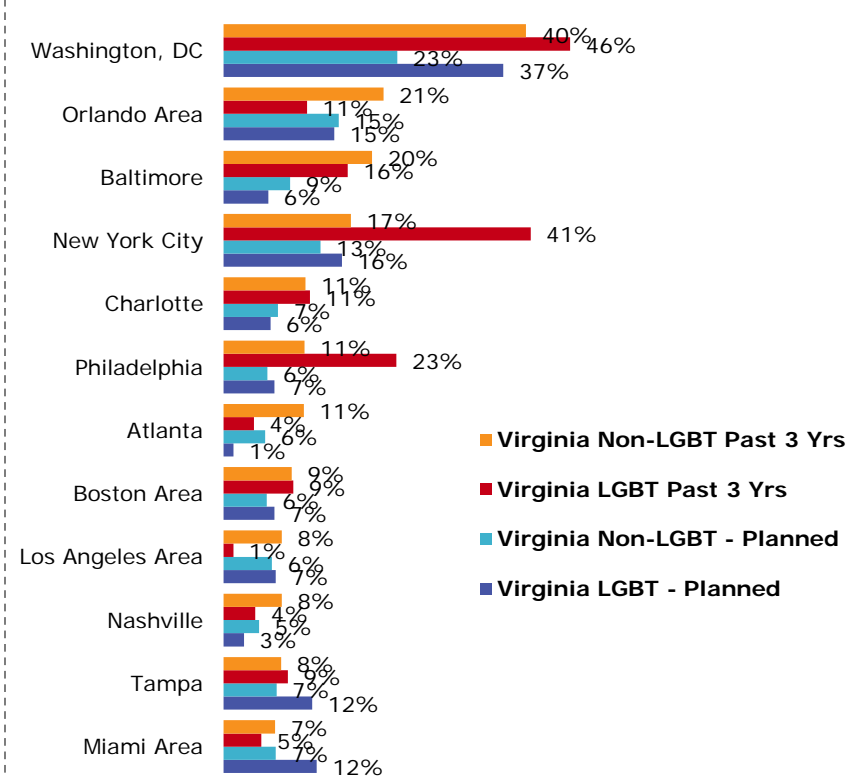
Top States

Base: Visited Virginia (Household Level)



Top Cities

Base: Visited Virginia (Household Level)



■ Virginia Non-LGBT Past 3 Yrs
■ Virginia LGBT Past 3 Yrs
■ Virginia Non-LGBT - Planned
■ Virginia LGBT - Planned

Q7a: Please indicate US states visited for leisure in past three years. Q7c: Which US states plan to visit within the next two years for leisure? Repeated for cities in Q8 series. (Household Level)



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Digital Behavior

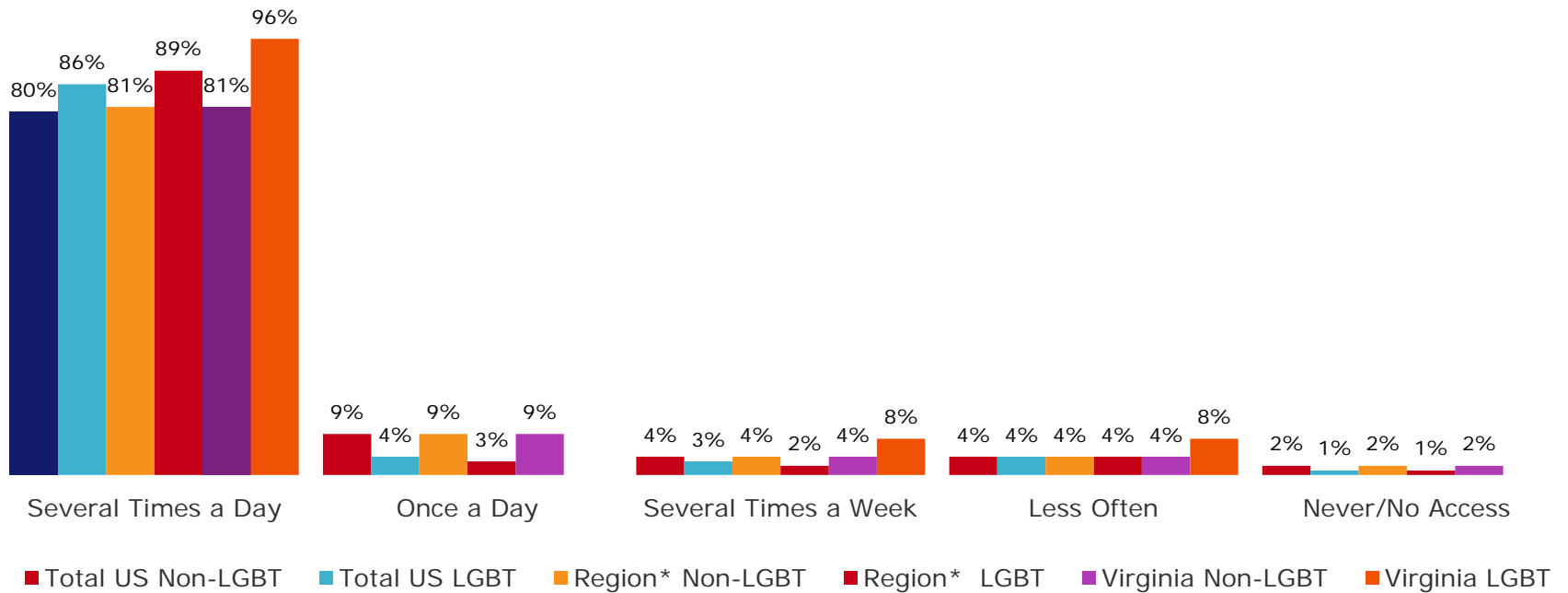


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Nearly everyone uses the internet, but LGBT travelers more likely access it multiple times per day



* VA, DC, MD, NC, PA

DL3. In general, how often do you personally access the internet for any purpose from any location (including via a mobile device)?



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Digital lifestyles



INFLUENCERS

The Internet is an integral part of my life. I'm young and a big mobile Internet user and generally access everywhere, all of the time. I'm a blogger, and a passionate social networker. I'm also a big online shopper, even via my mobile. I want to make sure as many people as possible hear my online voice.



COMMUNICATORS

I just love talking and expressing myself, whether that's face to face, on a fixed line, mobile or on social networking sites, instant messaging or just emailing people. I really want to express myself in the online world in the way that I can't in the offline one. I tend to be a smart phone user and I'm connecting online from my mobile, at home, at work or at college.



KNOWLEDGE-SEEKERS

I use the Internet to gain knowledge, information and to educate myself about the world. I'm not a big user of social networks but I do want to hear from like-minded people especially to help me make purchase decisions. I'm very interested in the latest thing.



NETWORKERS

The Internet is important for me to establish and maintain relationships. I have a busy life whether it's my profession or managing the home. I use things like social networking to keep in touch with people I wouldn't have time to otherwise. I'm a big home Internet home user and I'm very open to talking to brands and looking for promotions. That said I'm not really the kind of person to voice my opinions online.



ASPIRERS

I'm looking to create a personal space online. I'm very new to the Internet and I'm accessing via mobile and Internet cafes but mostly from home. I'm not doing a great deal at the moment online but I'm desperate to do more of everything, especially from a mobile device.



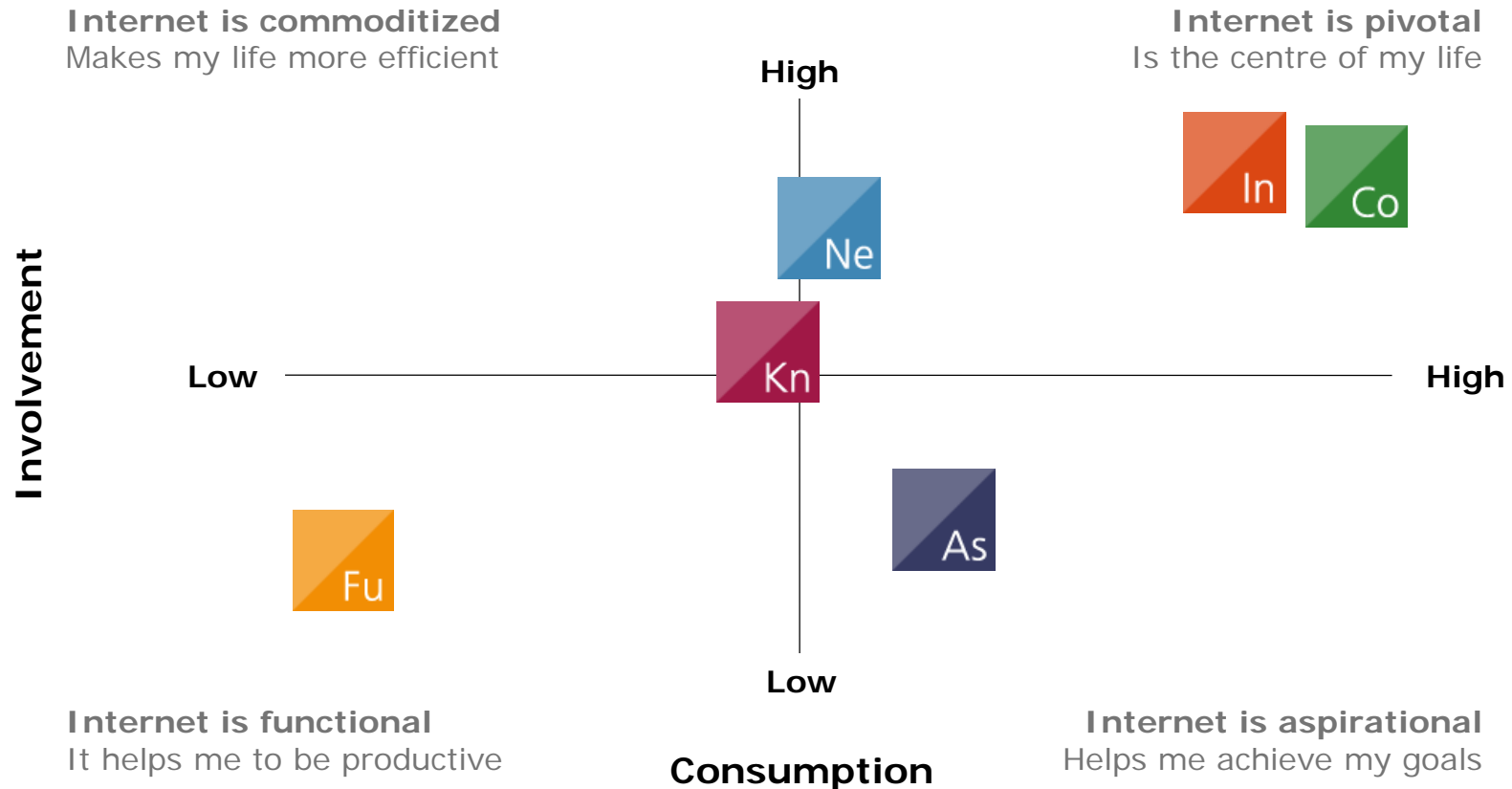
FUNCTIONALS

The Internet is a functional tool, I don't want to express myself online. I like emailing, checking the news, sport & weather but also online shopping. I'm really not interested in running my social life online and I am worried about data privacy and security. I am older and have been using the Internet for a long time.

Source: US Digital Life General Report

Role of digital media

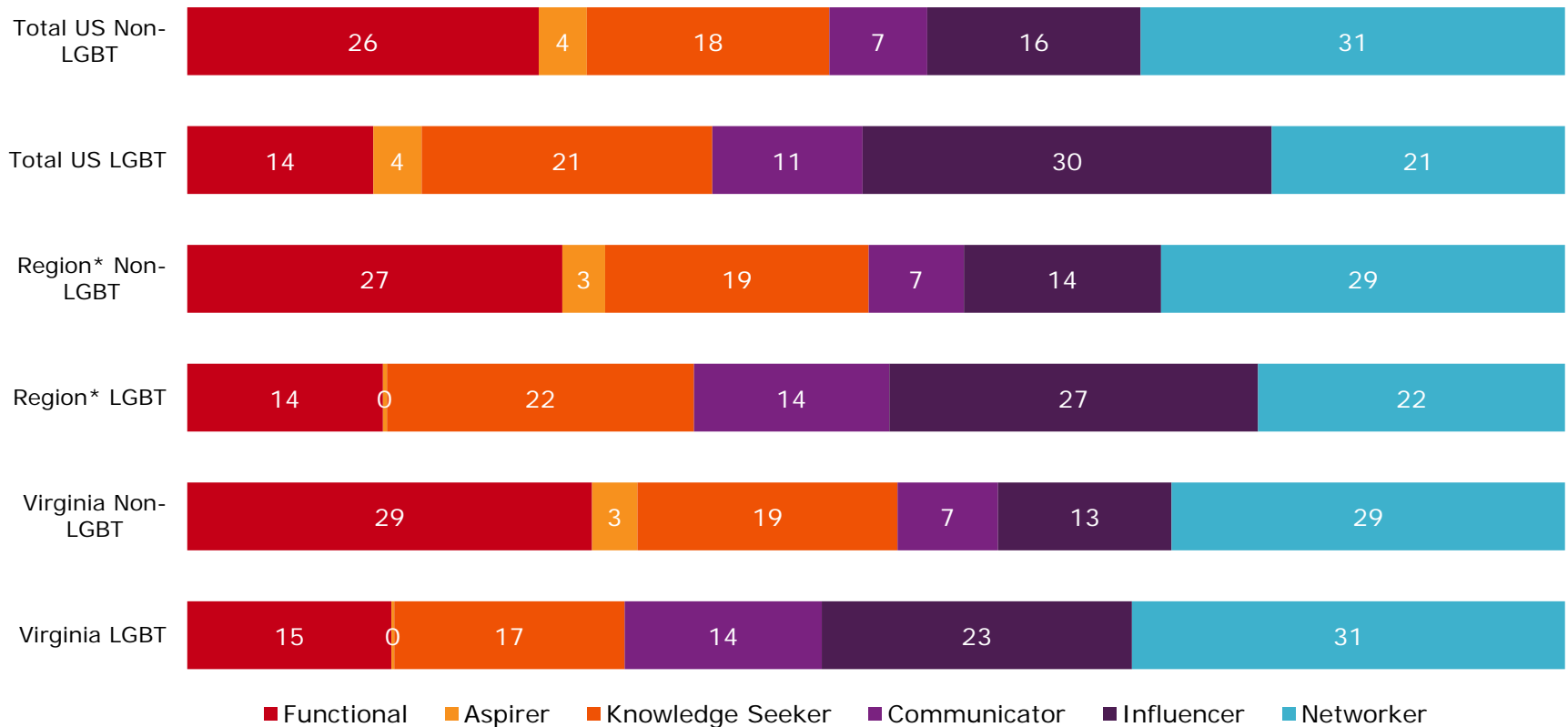
- Vital to Influencers and Communicators, digital media helps them disseminate their views.



Source: US Digital Life General Report

LGBT travelers skew heavily toward *Influencers*

- Far fewer of them (LGBT) categorize as *Functionals*
- However, half of LGBT visitors are either *Networkers* (*relationship-oriented*) or *Influencers* (*share their "online voice"*) ... so they carry a lot of weight because they share their opinions with others.



Source: TravelsAmerica Digital Life Segmentation

* VA, DC, MD, NC, PA

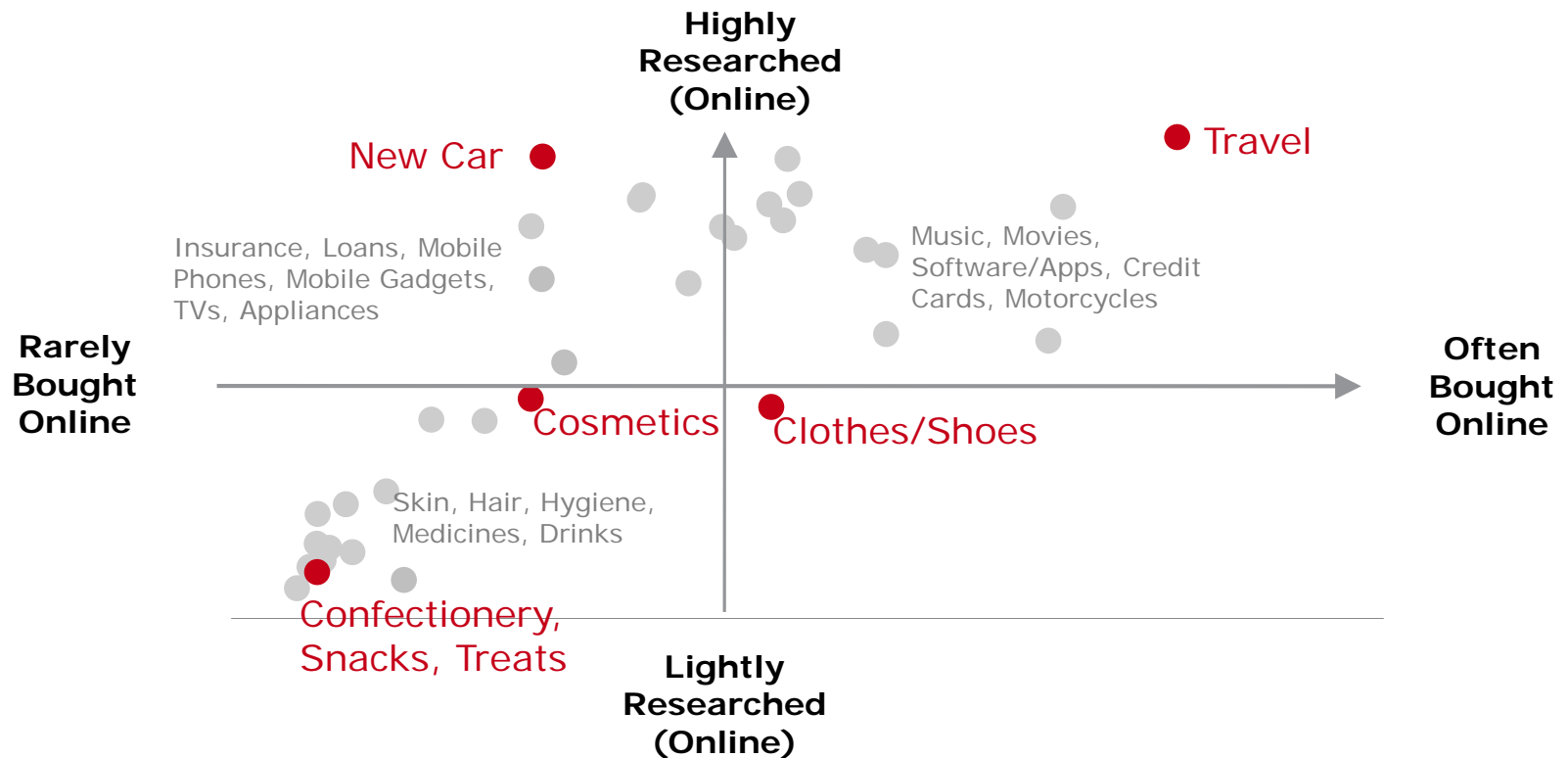


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Travel decisions and purchases more heavily depend upon online resources than any other type of purchase



Source: US Digital Life General Report

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Segment/Destination Profiles



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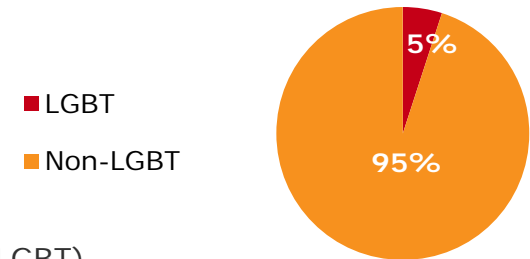
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VIRGINIA IS FOR LOVERS

US LGBT visitor profile

Market relevance

Only a few willingly identify as LGBT, but that climbs substantially among younger travelers.
Comparisons below = (LGBT vs. Non-LGBT)



LGBT Demographic Profile:

- Average age: Much younger (41 vs. 49; 40% of LGBT = 18-34 vs. 25% of Non-LGBT)
- Income: Lower incomes (\$73,500 vs. \$77,600; impacted by age and marital status)
- Married: Far below average (40% vs. 59%)
- Household composition: Usually live with one other person (40% vs. 38%) and seldom with children (18% vs. 27%)
- Ethnicity: Usually Caucasian (85% vs. 87%)
- Education: Similar to Non-LGBT (54% vs. 52% graduated 4-year college or more)
- Employment: Typically full-time (57% vs. 53%), few retired, again impacted by age (13% vs. 21%).

LGBT Trip Profile:

- Purpose: Primarily leisure (77% vs 74%); visit *friends/relatives* (43% vs. 40%) and *entertainment* (12% vs. 11%)
- Length of stay: Slightly more LGBT travelers spend the night (70% vs. 68%), they stay slightly longer when they do (3.7 vs. 3.5 nights), and slightly more opt for paid (hotels/motels/rentals/timeshare) lodging (49% vs. 46%)
- Travel party: Often travel in pairs (39% vs. 40%) or solo (34% vs. 28%); less often with children (17% vs. 24%)
- Mode: Typically drive their own car (73% vs. 76%)
- Planning horizon: Similar to others (58% vs. 58% decide within a month of the trip)
- Activity choices: Travel more often includes *visiting friends* (21% vs. 15%), *fine dining* (17% vs. 13%), *urban sightseeing* (12% vs. 8%), *nightclubs/dancing* (8% vs. 3%), and *art galleries* (8% vs. 3%)
- Spending: Spend more (\$775 vs. \$581), but not in any particular category
- Satisfaction with travel: Very similar to others (86% vs. 87% extremely/very satisfied).

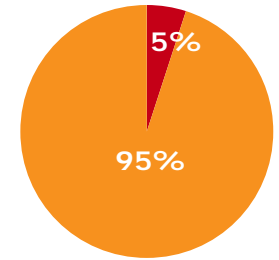
Region* LGBT visitor profile

Market relevance

Only a few willingly identify as LGBT, but that climbs substantially among younger travelers.

Comparisons below = (LGBT vs. Non-LGBT)

■ LGBT
■ Non-LGBT



LGBT Demographic Profile:

- Average age: Much younger (41 vs. 49; 43% of LGBT = 18-34 vs. 25% of Non-LGBT)
- Income: Slightly higher incomes (\$82,200 vs. \$79,400, aided by higher educational attainment)
- Married: Below average (45% vs. 58%)
- Household composition: Usually live with one other person (41% vs. 37%) and seldom with children (17% vs. 26%)
- Ethnicity: Usually Caucasian (86% vs. 87%)
- Education: Slightly more likely to have graduated 4-year college or higher degree (59% vs. 55%)
- Residence: Similar to non-LGBT visitors, most live in South Atlantic (47% vs. 51%) and Mid-Atlantic (27% vs. 30%)
- Employment: Typically full-time (55% vs. 54%), few retirees, again impacted by age (14% vs. 21%).

LGBT Trip Profile:

- Purpose: Primarily leisure (74% vs 74%); visit *friends/relatives* (47% vs. 43%) and *entertainment* (10% vs. 10%)
- Length of stay: More LGBT travelers spend the night (73% vs. 67%), they stay longer when they do (4.0 vs. 3.5 nights), and more opt for paid (hotels/motels/rentals/timeshare) lodging (53% vs. 43%)
- Travel party: Often travel in pairs (37% vs. 40%) or solo (36% vs. 29%); less often with children (15% vs. 23%)
- Mode: Typically drive their own car (77% vs. 78%)
- Planning horizon: Similar to others (56% vs. 56% decide within a month of the trip)
- Activity choices: Travel more often to *visit friends* (24% vs. 15%), *fine dine* (15% vs. 11%), *hike/backpack* (6% vs. 2%), *nightclub/dance* (8% vs. 3%), *attend family reunions* (7% vs. 3%) and see *art galleries* (8% vs. 3%)
- Spending: Spend more (\$541 vs. \$490)
- Satisfaction with travel: Somewhat similar to others (86% vs. 88% extremely/very satisfied). * VA, DC, MD, NC, PA



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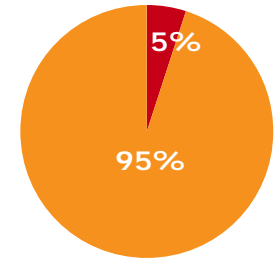
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Virginia LGBT visitor profile

Market relevance

Only a few willingly identify as LGBT, but that climbs substantially among younger travelers.
Comparisons below = (LGBT vs. Non-LGBT)

■ LGBT
■ Non-LGBT



LGBT Demographic Profile:

- Average age: Much younger (37 vs. 50; 56% of LGBT = 18-34 vs. 21% of Non-LGBT)
- Income: Lower incomes (\$77,700 vs. \$80,800; impacted by age and marital status)
- Married: Far below average (29% vs. 61%)
- Household composition: Live with one other (32% vs. 39%) or alone (32% vs. 21%); few with kids (14% vs. 26%)
- Ethnicity: Usually Caucasian (86% vs. 86%)
- Education: Slightly more likely to have graduated 4-year college or higher degree (64% vs. 65%)
- Residence: Similar to non-LGBT visitors, most live in the South Atlantic (47% vs. 51%), but states vary
- Employment: Typically full-time (59% vs. 53%), few retirees, again impacted by age (10% vs. 24%).

LGBT Trip Profile:

- Purpose: Primarily leisure (70% vs 75%), but more business travel than non-LGBT (18% vs. 13%)
- Length of stay: More LGBT travelers spend the night (75% vs. 67%), they stay longer when they do (4.2 vs. 3.4 nights), and more opt for paid (hotels/motels/rentals/timeshare) lodging (62% vs. 41%)
- Travel party: Often travel in pairs (31% vs. 40%) or solo (41% vs. 28%); less often with children (12% vs. 25%)
- Mode: Typically drive their own car (84% vs. 80%)
- Planning horizon: Slightly shorter time to decide on trip (58% vs. 53% decide within a month of the trip)
- Activity choices: Travel more often to *visit relatives* (35% vs. 30%), *visit friends* (23% vs. 16%), *sightsee rural* (19% vs. 12%) or *urban* (16% vs. 10%), *state parks* (12% vs. 4%), and *nightclubs/dancing* (6% vs. 2%)
- Spending: Spend much more (\$714 vs. \$411), especially for lodging (since they stay longer in paid accommodations)
- Satisfaction with travel: Very satisfied, but not quite as much as non-LGBT (85% vs. 89% extremely/very satisfied).



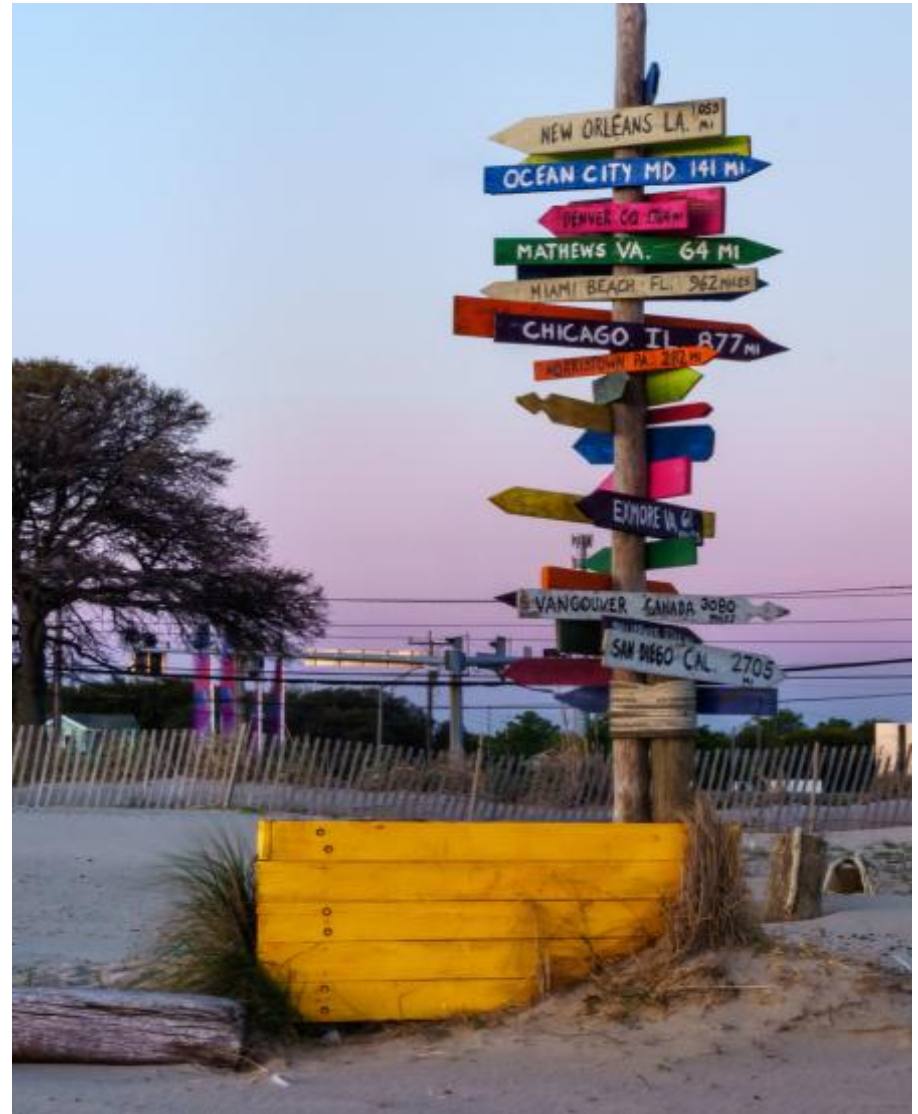
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8

Research Methods and Glossary



Research methods

The syndicated TravelsAmerica study uses a web-based research methodology. Sample is selected from the TNS USA Panel with monthly e-mail invitations sent to representative households with a target response rate of 45%. The field period runs for two weeks each month, usually starting in the middle of the first week. TNS constantly strives to keep Internet penetration high and panel fatigue low by carefully monitoring and limiting the number of contacts with each household.

To enhance relevance, the data are weighted two ways:

- Demographic weights adjust respondents by demographic factors such as region, age, income, household size, and marital status to more closely represent the characteristics of the US population
- Trip projection calculations count every trip taken by respondents for total trips taken and in the case of state level calculations, each trip taken in that state counts. A few tables represent person-trips – these take into account the immediate household travel party size for each trip as well.

TNS supervises all fieldwork, editing, coding, and tabulation of the results.

This special report focuses on results for the states of VA, DC, MD, NC, PA. For the time period January 2014 through March 2015, respondents for key segments in this report are shown below.

CY 2014 # of Travelers (Unweighted)	CY 2014 # of Travelers (Weighted by Demographics)	Group
54,967	53,966	Total US Non-LGBT
2,136	2,523	Total US LGBT
7,122	6,879	Region* Non-LGBT
264	312	Region* LGBT
1,582	1,529	Virginia Non-LGBT
51	67	Virginia LGBT

* VA, DC, MD, NC, PA



Glossary

Term	Definition
DMA	Designated Market Area: Counties that share the same primary TV broadcast signals (210 DMAs in US)
Time Period	January 1, 2014 through March 31, 2015
Region	Virginia, Washington DC, Maryland, North Carolina, Pennsylvania
Person-Trip	Total person-trips are all trips taken by all people; i.e. a couple taking three trips counts as six (two people, each taking three trips)
Respondent/Household Level	Respondent information – one count per respondent
Source of Visitors	Residence of visitors
State/Region Level	Information about all trips taken to a particular state/region (each trip to area counts)
Travel Party	Traveler plus all companions, including children
Trip	Travel 50 miles or more (one-way) away from home or stayed overnight. Excludes commuters or commercial travel (flight attendants, commercial vehicle operator). This may eliminate some leisure day trips that are closer than 50 miles away.
Trip Level	Information about all trips – each trip counts
Trip Volume	All trips summed together
Visitor	Person who has visited area in the past month; all are US residents, thus, travel is domestic travel only (does not include international visitors)

Thank you



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