

LGBT TOURISM: A GROWING SEGMENT, STILL UNKNOWN

Insight into travel trends

Since 2010, Pangaea Network, of which AIGO is a founding member, has been leading the project Pangaea Observatory. An international panel of specialists in the travel industry is called, twice a year, to express his views on issues that may have a significant impact on the development of international tourism.

This edition of Pangaea Observatory focuses on LGBT (Lesbian – Gay -Bisexual - Transgender) tourism trends. It shows interesting potential both for the product and for the distribution channel. Panel is composed by 373 professionals of the tourism industry for 60% of travel agents and tour operators, in France, Germany, Italy, UK and Spain.

The findings

Just over half of respondents has a **LGBT clientele** and, among those who have, 68% declare that LGBT trips make up less than 10% of total turnover. France seems to be the country with the fewest LGBT customers, with 51%; **Germany has the highest percentage (87%)**.

The countries in which LGBT comprises more than 20% of turnover are Germany (11%), the UK (9%) and Spain (7%). In Italy (80%) and France (79%) the volume of business generated by LGBT customers is usually less than 10% of total turnover.

In general, the LGBT customer has a **level of spending that is between € 1,500 and € 2,500 per person per trip, preferring flight + hotel package**.

Average expenditure is varied. French people spend the most, with 30% claiming that the average expenditure per person per trip is more than € 2,500; whilst the Brits count the highest percentage of those who spend less than €1,500 (23%).

Preferred destinations

Mykonos, Gran Canaria and New York the first three preferred destinations by what emerges from all markets, in particular Spain and Greece are favored by the Italians, GranCanaria and Mykonos are favored by the Germans, New York and Madrid the favorite destinations by the Spanish; Mykonos and Thailand, the French's favorite and finally GranCanaria and New York to the respondents in the UK.



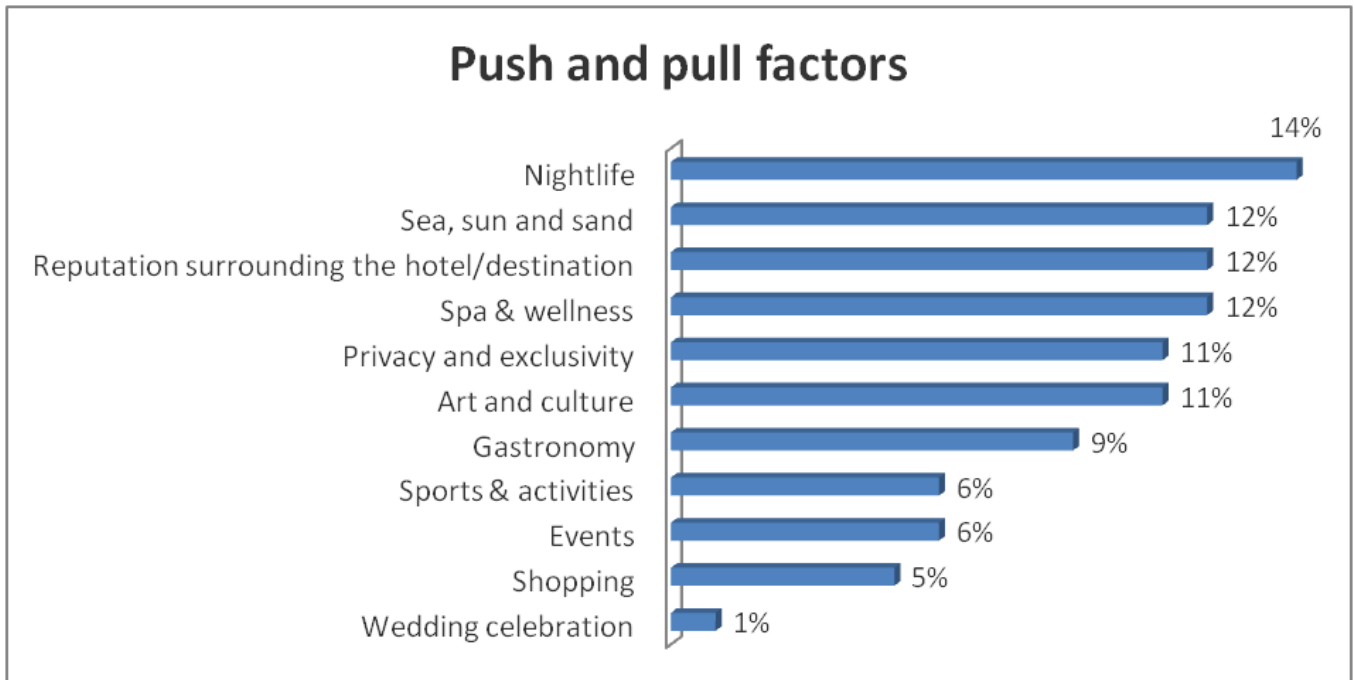
With regard to the choice of hotel, 43% of respondents prefer a gay friendly hotel while by an equally 43% hotel makes no difference. Only 6% choose to stay in gay only hotel.

The UK is the only market in which gay friendly facilities are favoured (54%). In both Italy (50%) and Germany (46%) these factors make no difference in the choice of hotel.

Spanish (62%) and French (55%) customers were those who **most frequently request packages designed by specialised tour operators.**

In any case, investigating the LGBT travel habits, the majority of respondents state for 71% that LGBT clients do not have different travel habits. Only German professionals thinks that LGBT customers have specific requests on products and that they are particularly interested in luxury products.

Among the elements which attracts the LGBT clients the most: visiting destinations with a vibrant nightlife, followed by sea sun and sand vacations, brand reputation and Spa & Wellness.



Analysing the data, the Brits, Germans and Italians head to destinations with a vibrant nightlife, the French look at the reputation of hotel. Finally, the Spanish prefer art cities.

In terms of the travel habits, the LGBT customers **seem mostly repeat travellers**, with only Italians in contrast (59%).

Professional's opinion

As per travel agents and their attitude towards LGBT customers, 55% think that **it is important to being gay-friendly labelled** to secure LGBT clients; only 13% of respondents believe that this label may annoy the others clients.

Referring to LGBT products and travel packages, the response is almost evenly divided between those who believe that it is important to have specialised products (52%) and those who believe that there is no need (48%). Anyway, there is a clear interest in LGBT tourism, since **87% of the travel trade would like to increase their knowledge about gay-friendly products**.

In the end, almost all respondents believe that the **LGBT travel segment will expand in the near future**.

AIGO

AIGO is a marketing and communications agency that has specialised in tourism, travel and hospitality. Since 1990 AIGO successfully positioning itself on the market destinations, travel products and services by defining an analytical and innovative processes required to position and promote brand, enable the multi-channel distribution and develop with the consumer an interaction aimed at the sale. The services offered by a team of about 30 professionals, cover: strategic consulting, representation, consumer marketing and trade marketing, public relations & digital PR, engagement, communication & advertising, events. AIGO is a founding member of Pangaea Network.

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