

LGBT Tourism Travel Trends

October 2013

AIGO is a **consulting company dealing in marketing and communication**. Since its foundation in 1990, it has specialised in tourism, transport and hospitality.

For over 20 years, AIGO has acted as a consultant and partner to tourism industries, airlines, hotel chains and distribution operators, contributing to the development of organisations, brands and products, with great success in every field.

AIGO combines its deep knowledge of trade and media with a rigorous methodological approach, based on the research and analysis of market data, defining a clear strategy that leads to the implementation of effective marketing plans and integrated communication, with considerable results.



AIGO and Pangaea

AIGO is the founding member of Pangaea Network, an international network of independent agencies specialising in strategic consultancy, through which the agency provides its customers with a global vision and local resources, able to support them in the development of new markets.

The Network currently has 13 partners and covers over 20 markets, including the main European countries, Russia, the USA, Latin America, Canada, China, the UAE and Australia.



Twice a year the Pangaea Observatory polls the European Trade on patterns and trends that shape the world of travel.

This edition has been devoted to LGBT (Lesbian-Gay-Bisexual-Transgender) travel trends, in order to find answers to questions such as:

- Is there an LGBT segment in tourism?
- Does the LGBT customer require specialised products?
- Are there different travel trends in Europe?
- Which destinations and products does the LGBT client prefer?
- Is it important to be labelled as a gay-friendly agency?



The study

- The survey was carried out between July and September 2013
- The panel was composed of 373 travel industry professionals from 5 European countries (France, Germany, Italy, Spain and the UK)
- Travel agents and tour operators comprised 60% of those interviewed



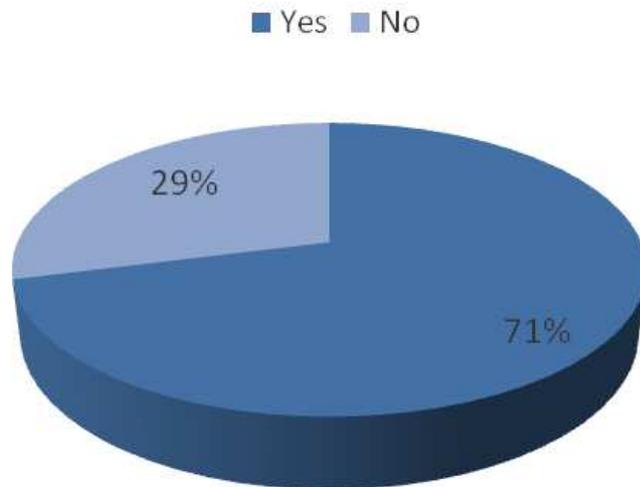


LGBT clientele

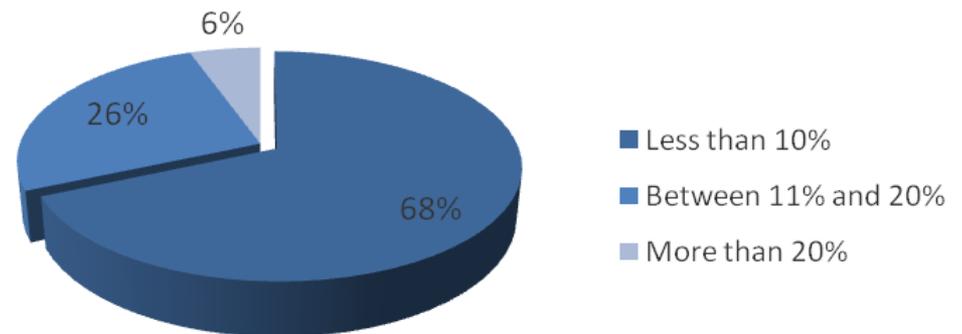
1. Volume of business

Over 70% of respondents claim to have LGBT clients. Among those who have, 68% declare that their trips make up less than 10% of total turnover.

Do you have LGBT clients?

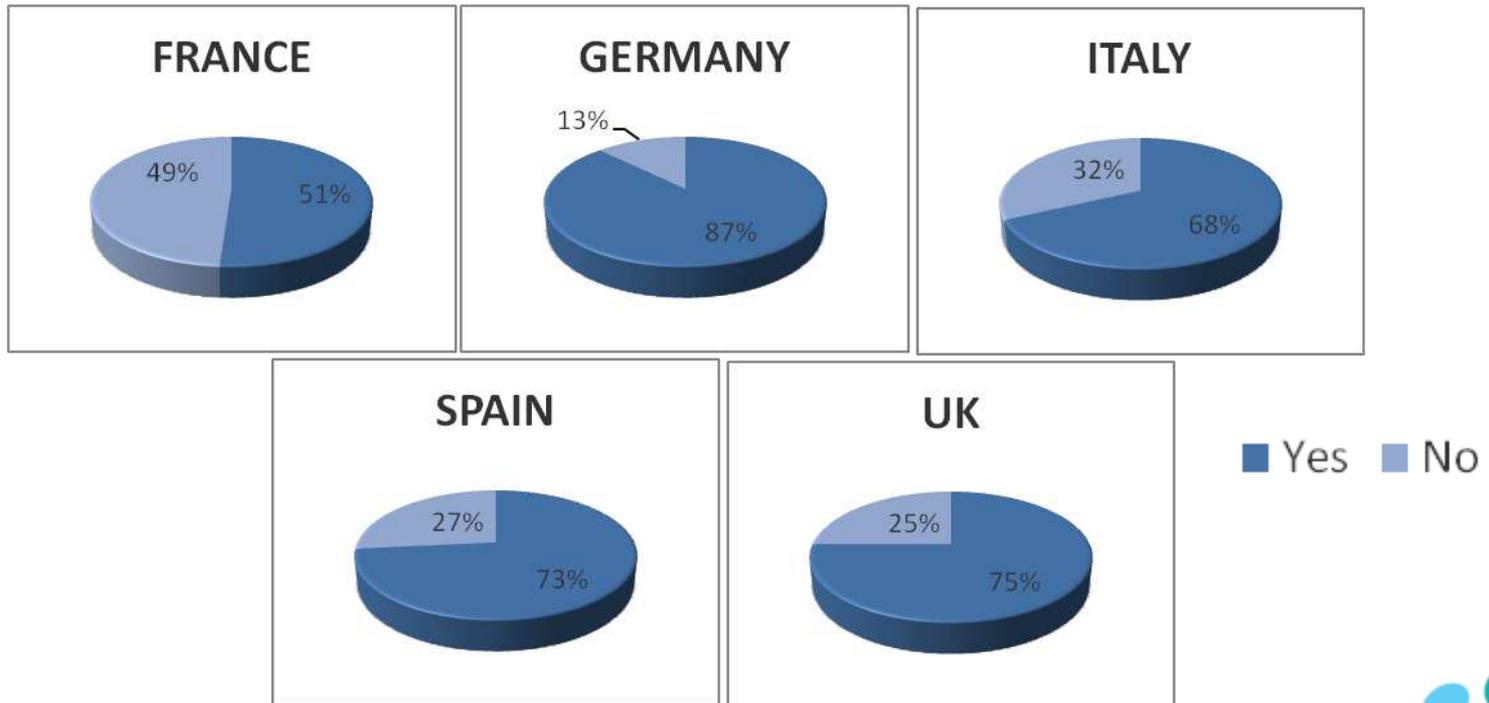


How much of your turnover is comprised of this travel segment?



1a. Volume of business market cross-section

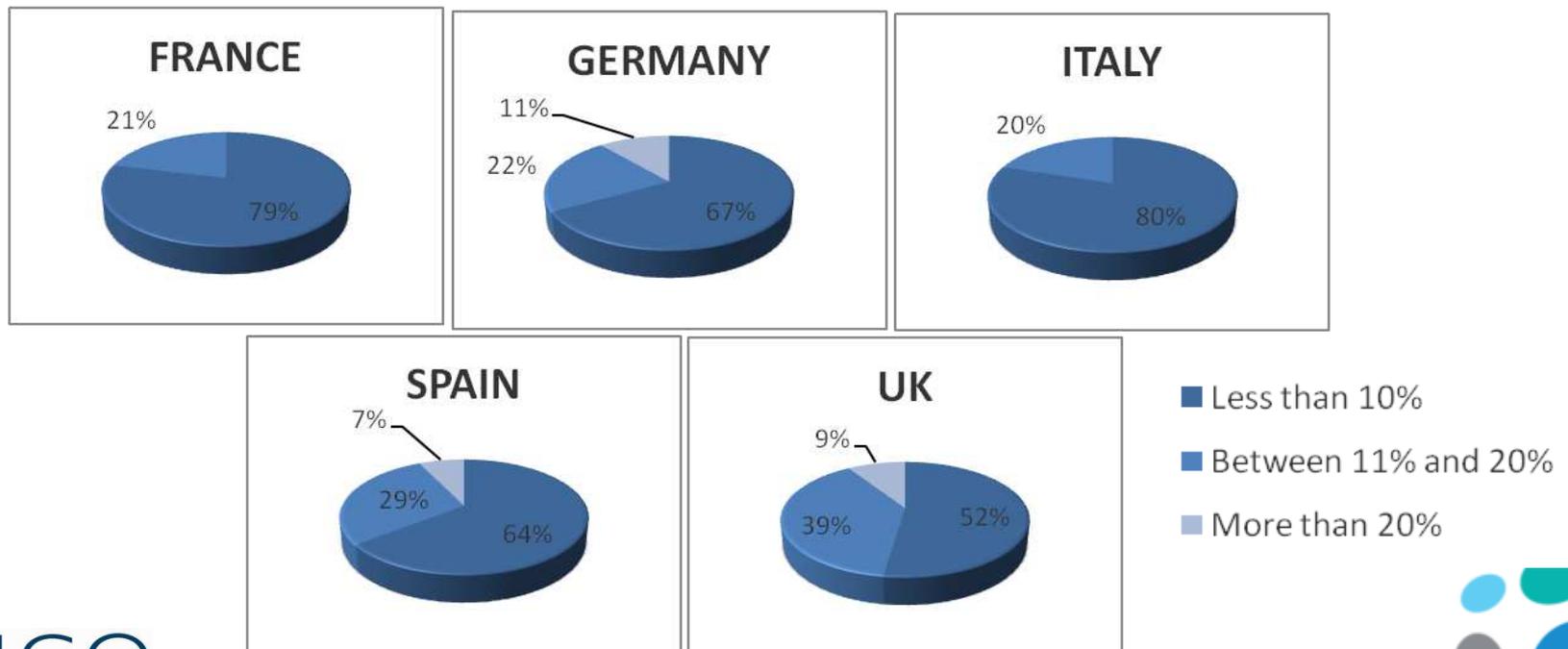
To the question: “Do you have LGBT customers?“, France appears to be the market with the fewest LGBT customers, with 51%. Germany has the highest percentage (87%).



1b. Volume of business market cross-section

How do LGBT trips affect your turnover?

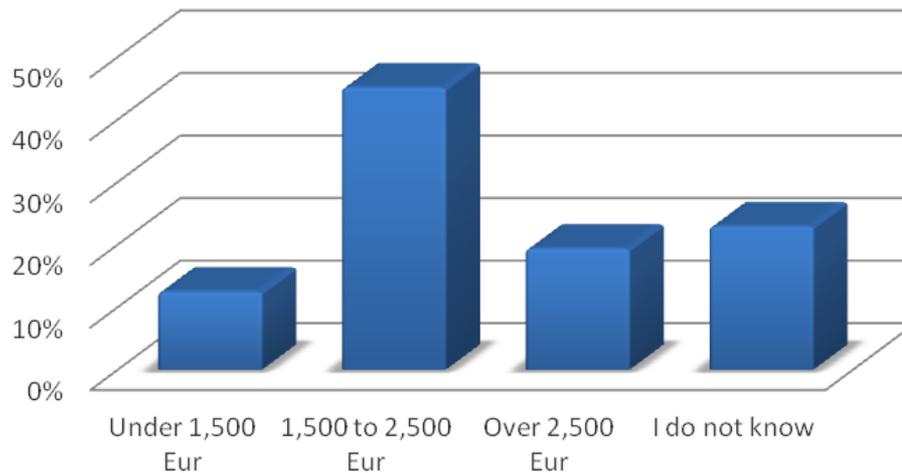
The only countries in which LGBT comprises more than 20% of turnover are Germany (11%), the UK (9%) and Spain (7%). In Italy (80%) and France (79%) the volume of business generated by LGBT customers is usually less than 10%.



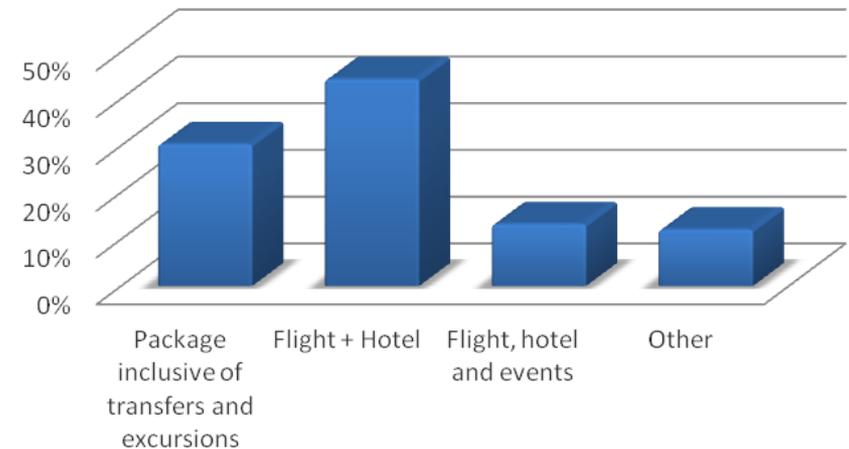
2. Average expenditure and travel package

For the majority of respondents (45%) the travel expense per person is between € 1,500 - € 2,500. Preferred package is combined flight + hotel (44%).

Average expenditure per pers



Preferred travel package

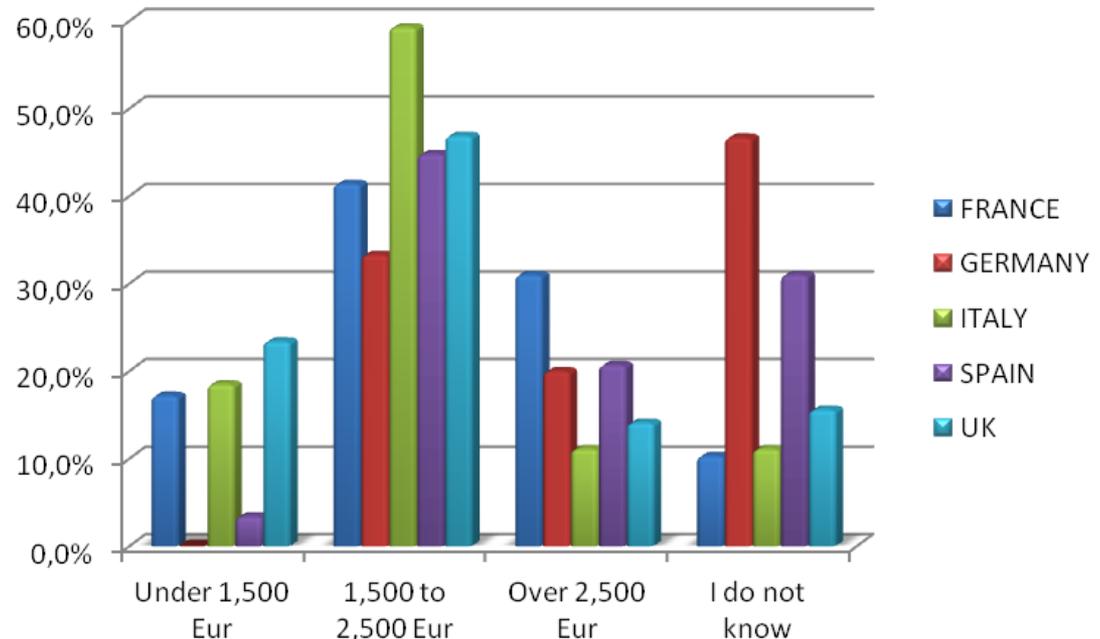


2a. Average expenditure market cross-section

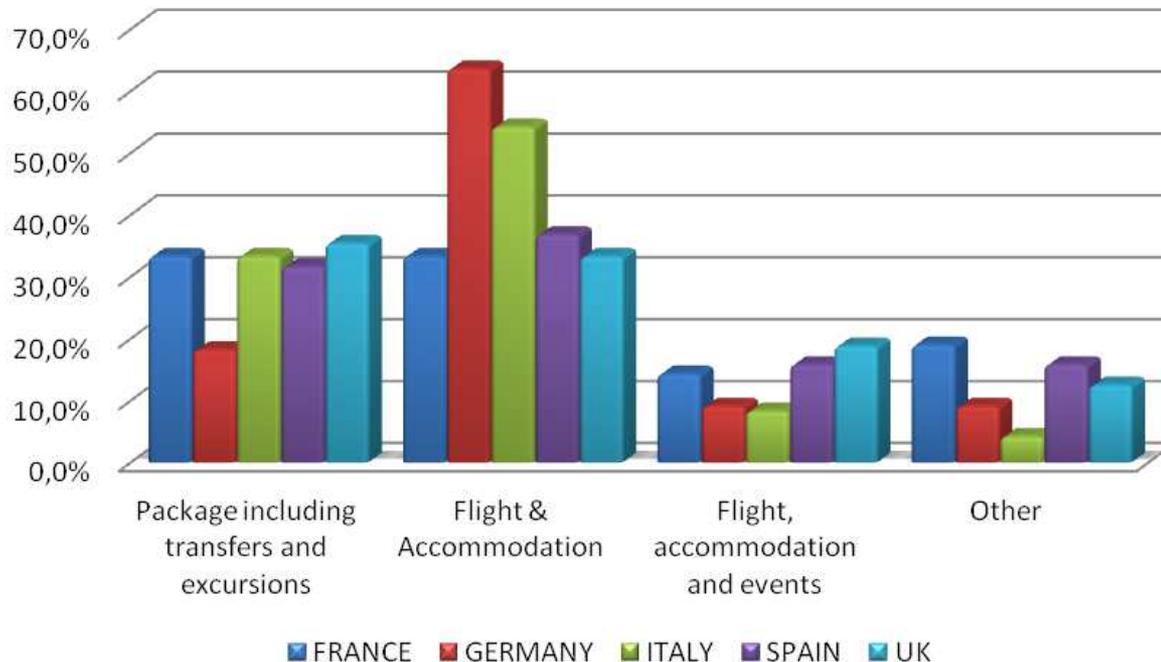
French people spend the most, with 30% claiming that the average expenditure per person per trip is more than € 2,500.

The British count the highest percentage of those who spend less than €1,500 (23%).

In Germany most of respondents (46%) do not know how to answer this question.



2b. Preferred travel package market cross-section



The Flight + Hotel is the most frequently booked package in all markets, except for the UK, where 35% prefer to purchase a package which includes transfers and excursions.



3a. Preferred destinations

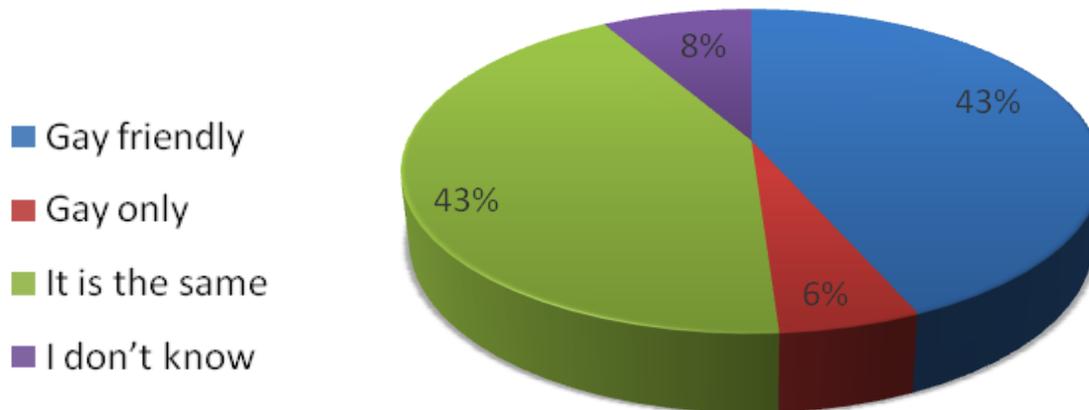


Mauritius

4. Preferred accommodation

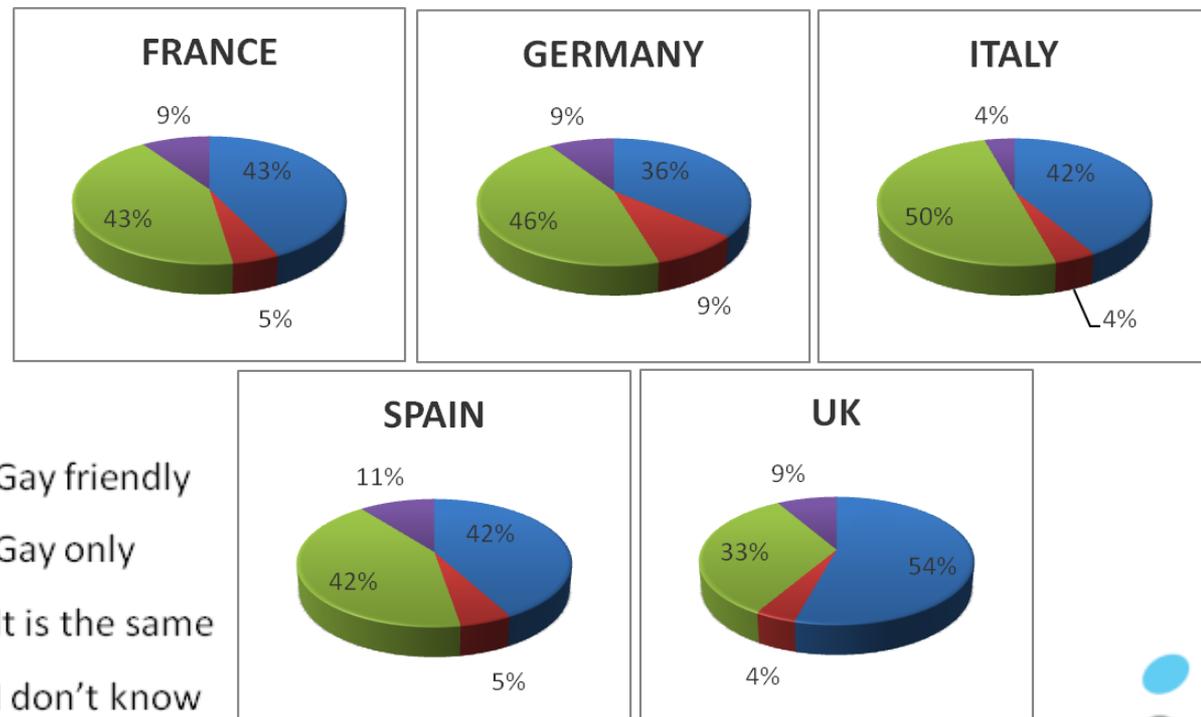
43% of respondents prefer a gay-friendly hotel. However, another 43% also say that it makes no difference to them whether hotel is gay friendly or not.

Preferred accommodation



4a. Preferred accommodation market cross-section

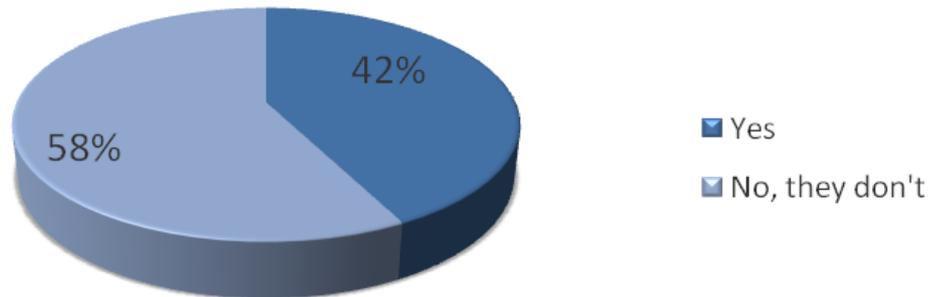
The European response is varied. The UK is the only market in which gay friendly facilities are favoured (54%). France (43%) and Spain (42%) both show identical numbers of those who choose gay friendly accommodation and those who do not matter the difference. In both Italy (50%) and Germany (46%) these factors make no difference in the choice of hotel.



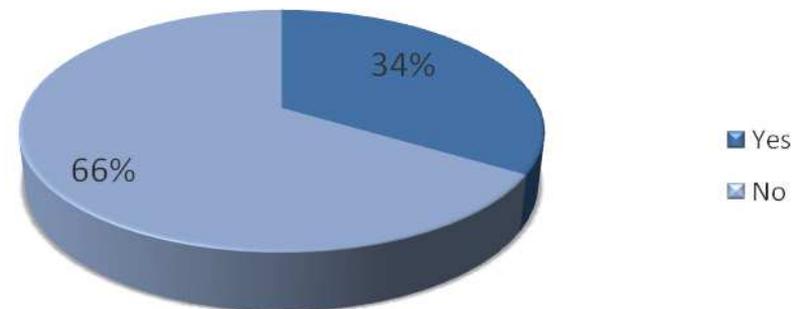
5. Specialised Tour Operators

According to professionals, 58% of customers do not ask for specialised packages. In line with the above, 66% of holiday-goers say that they do not necessarily apply to specialist tour operators. Only 34% say that they rely on specialist tour operators.

Do LGBT request travel packages designed by specialized tour operators?

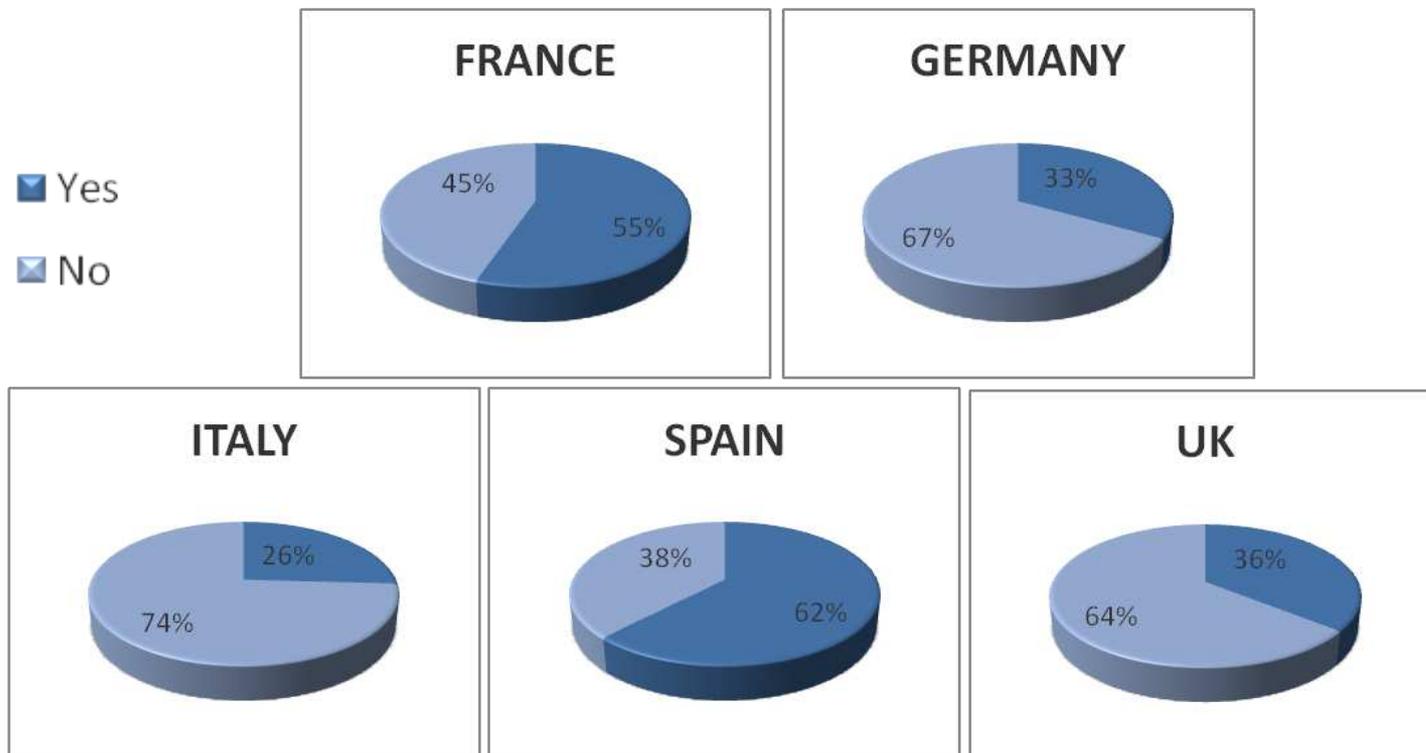


Do you apply to specialized tour operators?



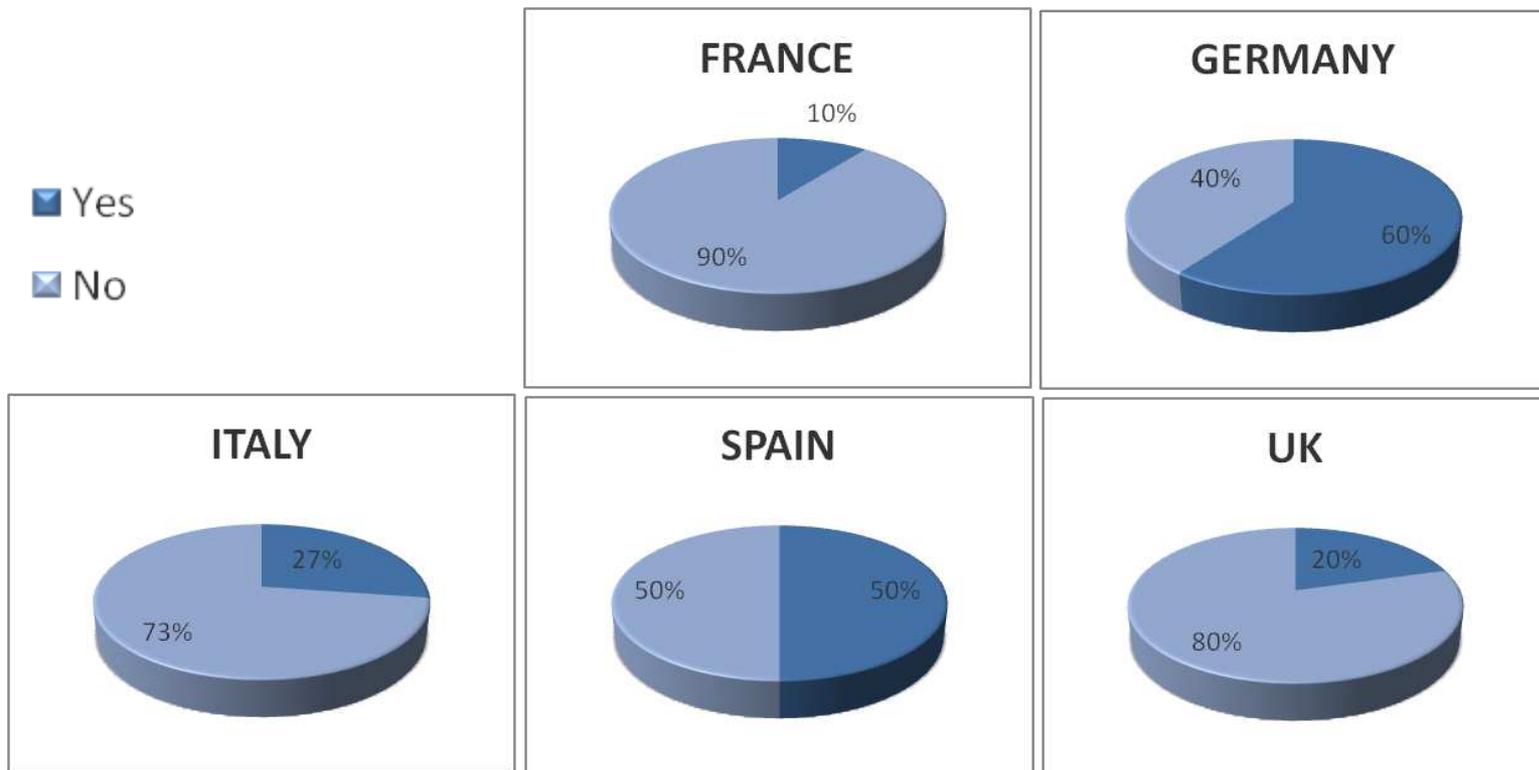
5a. Travel packages market cross-section

Spanish (62%) and French (55%) customers are those who most frequently request packages designed by specialist.



5b. Specialised Tour Operators market cross-section

German travel agents apply most frequently to specialist tour operators (60%), even though only 33% of their customers request it, followed by the Spanish (50%).



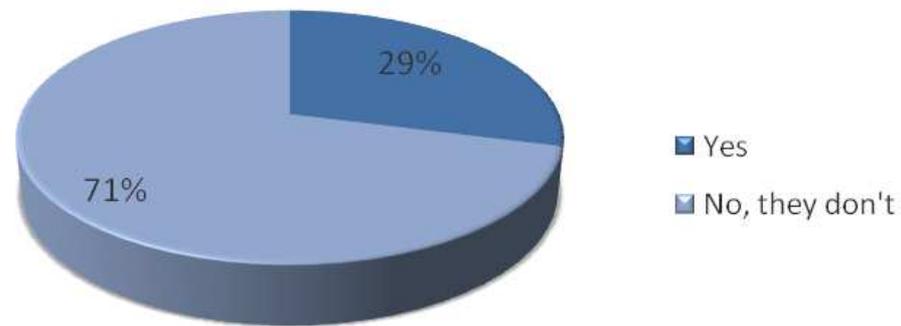


LGBT Travel Habits

1. Travel Habits

71% of respondents believe that the LGBT travellers do not have any particular travel habits.

Do LGBT clients have different travel habits?

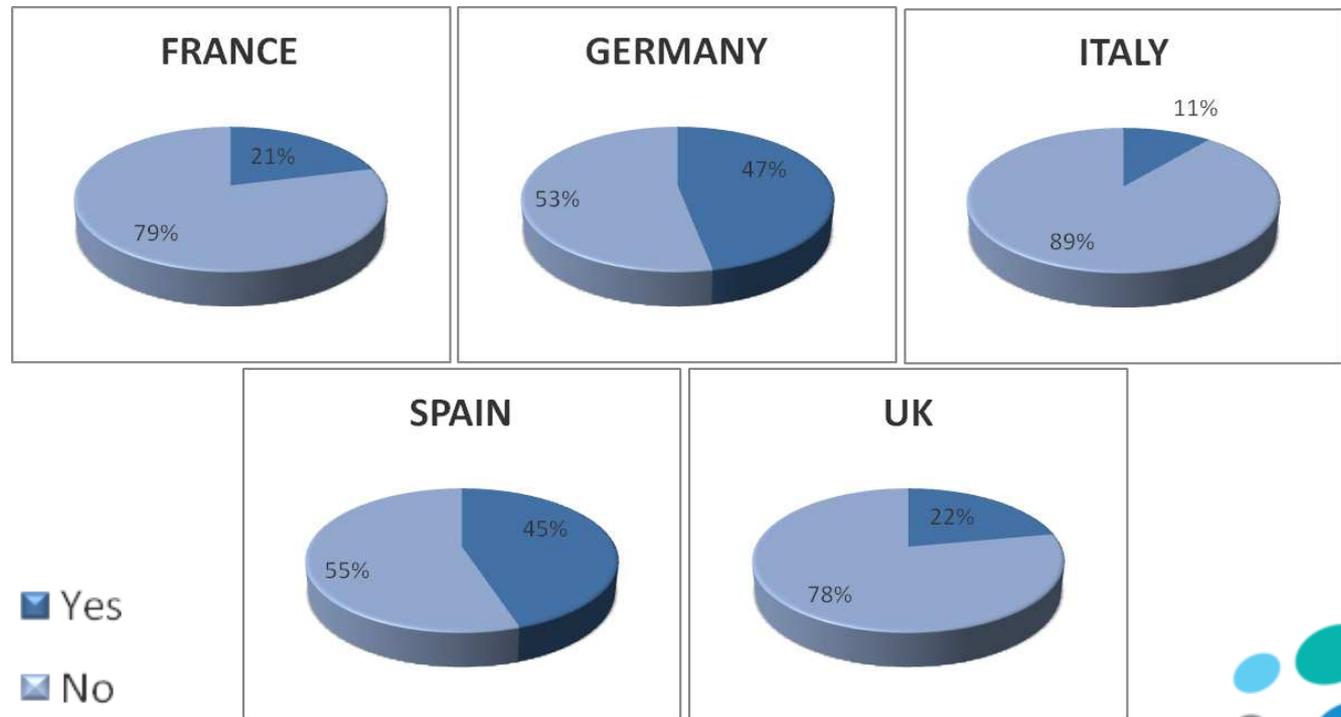


1a. Travel Habits

market cross- section

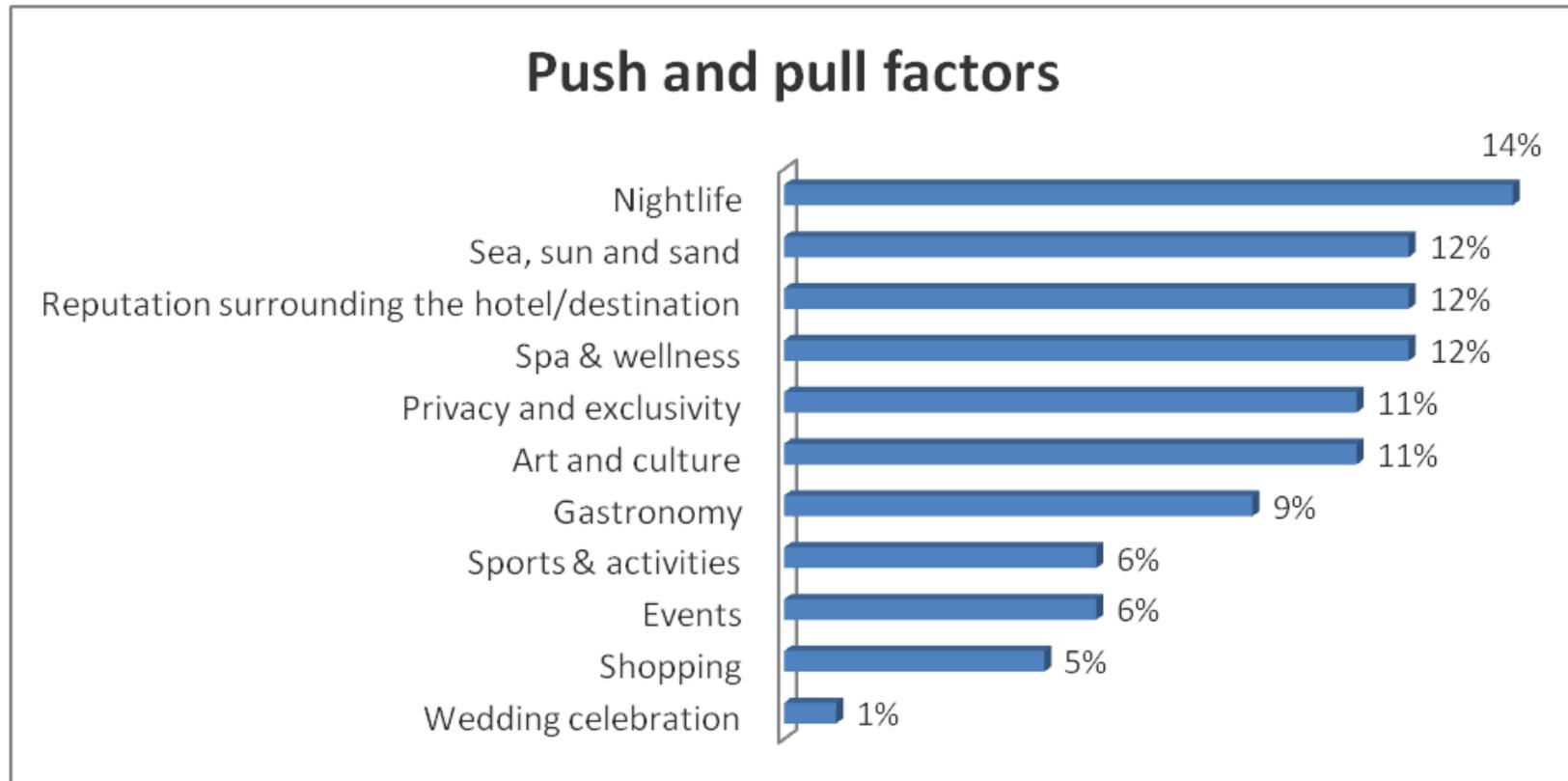
The answer from each market is in line with the European average.

Germany is the country in which the highest number of professionals (47%) think that LGBT customers have different travel habits. In their opinion, they seem to be more demanding and request more high-end products.



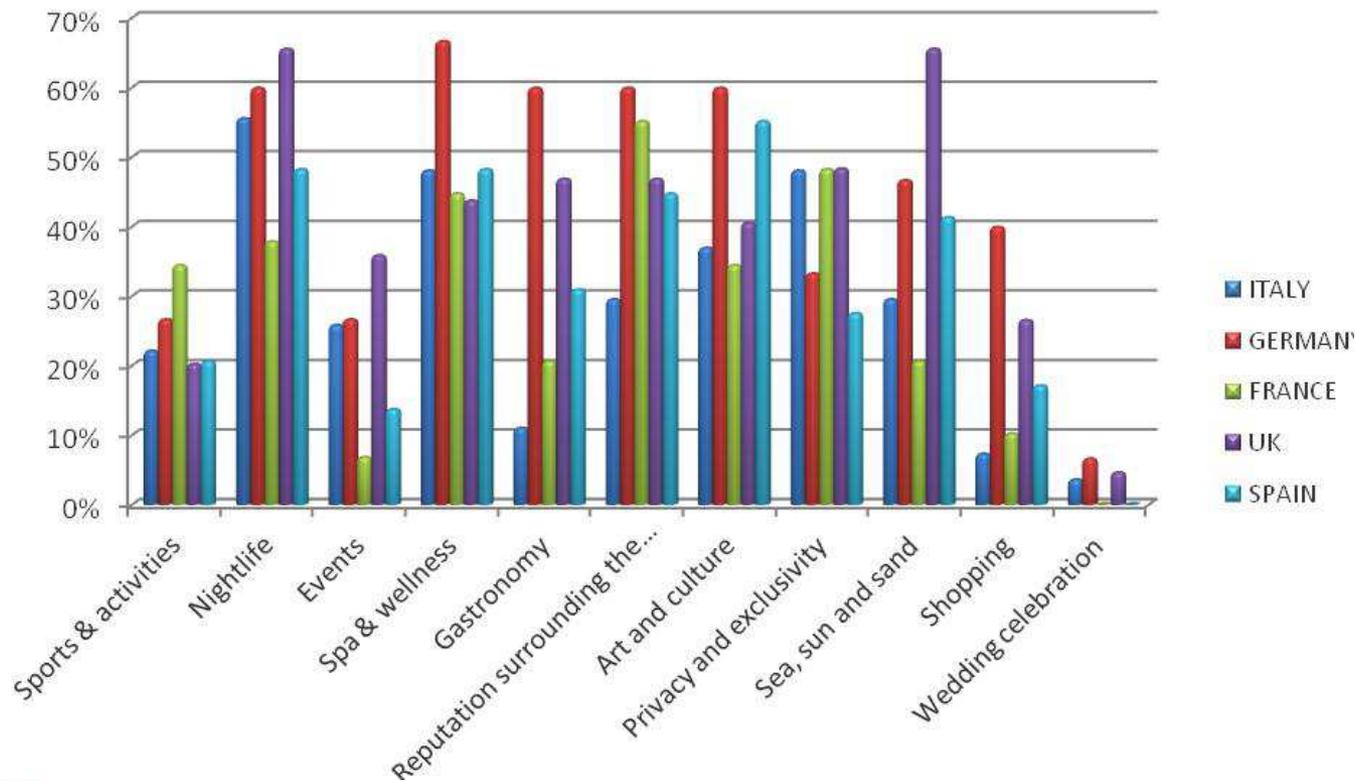
2. Type of Trip

Which of these elements attracts your LGBT clients the most?



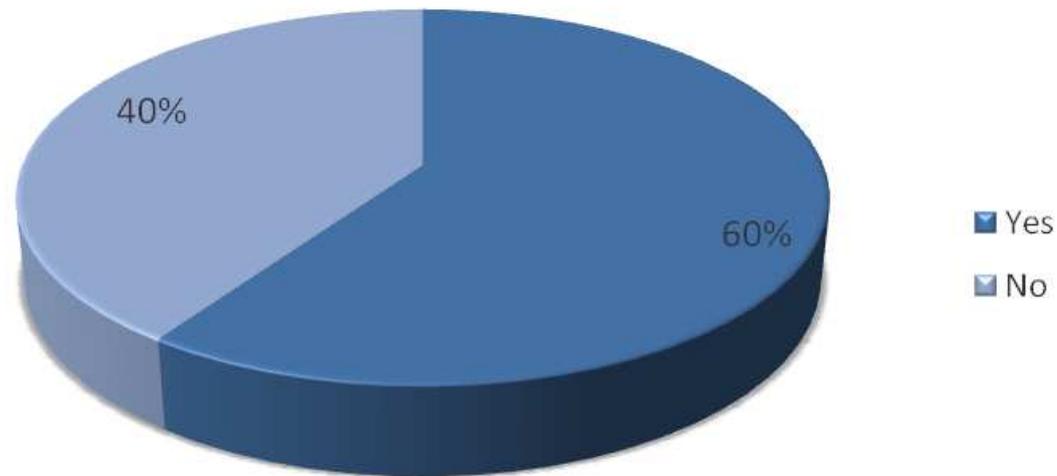
2a. Type of Trip market cross-section

Brits (65%), Germans (60%) and Italians (55%) head to destinations with nightlife. 55% of the French look at the reputation of hotel or the destination. The Spanish prefer art cities. Brits choose sea, sun and sand destinations.



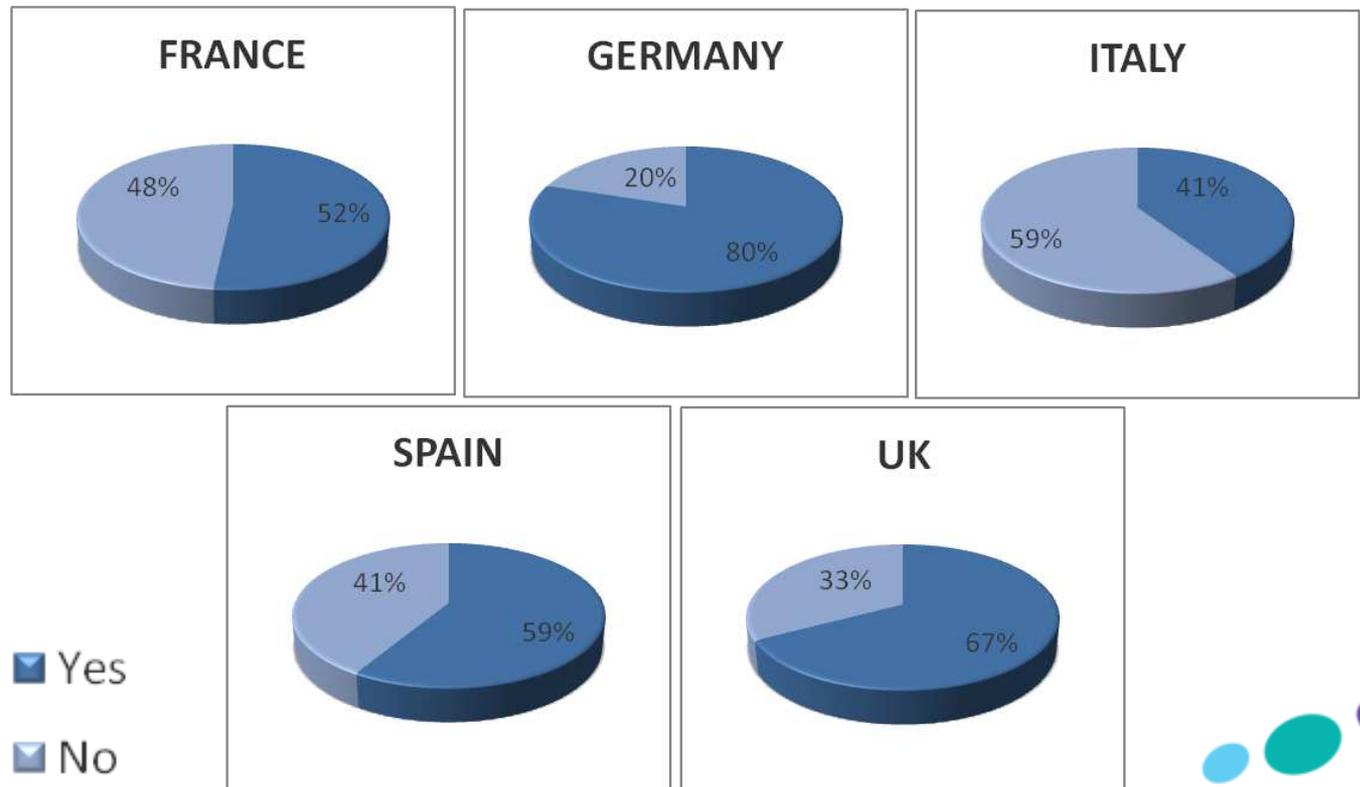
3. Are LGBT repeaters?

6 out of 10 travellers seem to be faithful to their favourite destination.



3a. Are LGBT repeaters? market cross-section

Italy is the only country with a different opinion: 59% think that LGBT travellers do prefer to change destination from time to time.





Travel trade opinion

1. What is a gay-friendly destination?

Professionals identify two possible answers:

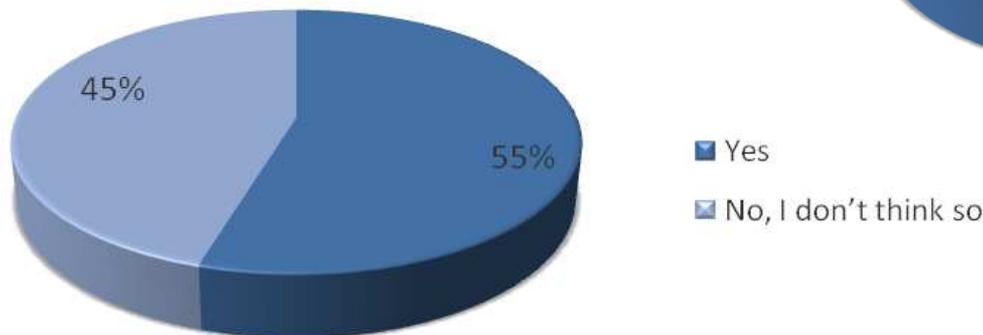
- 1 - A destination where there is full tolerance of human rights
- 2 - A destination with widespread gay-friendly venues (hotels, bars, restaurants), dedicated events and dynamic nightlife



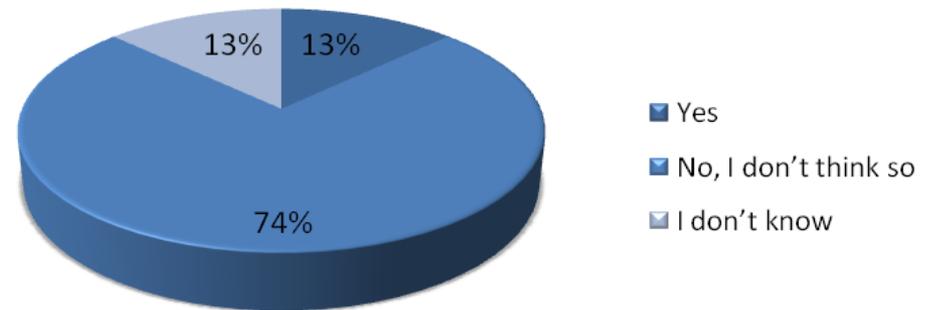
2. Being labelled gay-friendly

55% of interviewees believe that being recognised as a gay-friendly agency is important to secure LGBT clients. 74% of professionals believe that it may not annoy the clientele.

Is it important to be gay-friendly labelled?

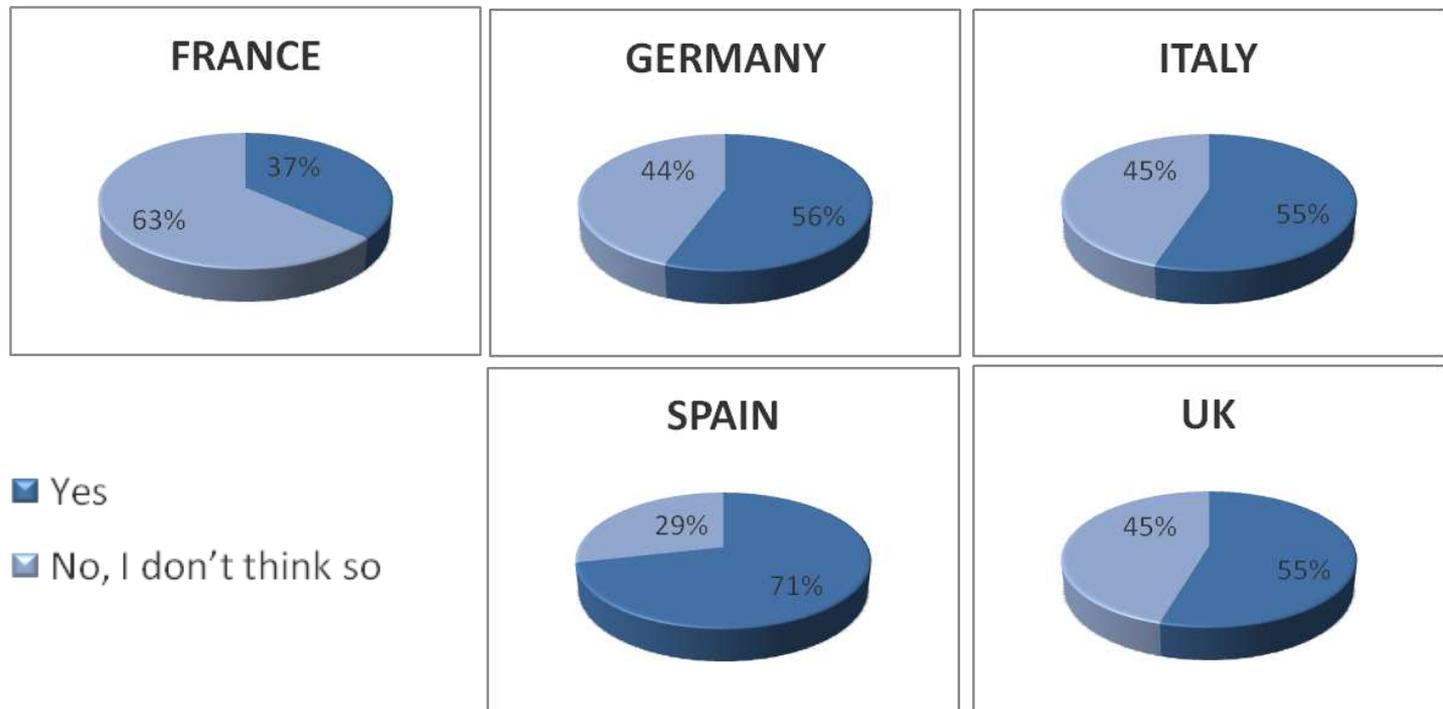


Does being a gay friendly labelled agency may annoy the other clients?



2a. Being labelled gay-friendly market cross-section - importance

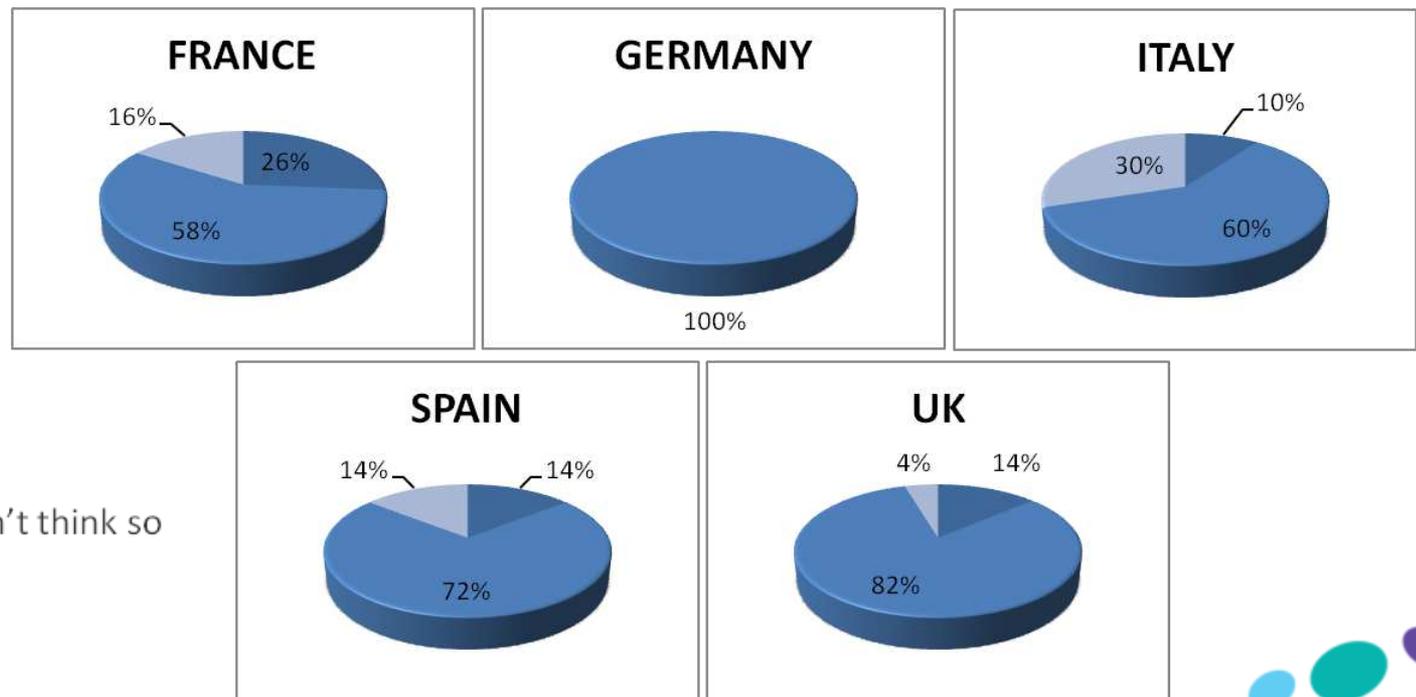
France is the only nation in which a majority do not believe it is important to be labelled gay-friendly, with 63% answering 'no'. 71% of the Spanish travel trade believe that it is important.



2b. Being labelled gay-friendly market cross-section - compatibility

Do you think it may annoy the other clients?

26% of French answer “yes”. Germany, on the contrary, unanimously believes that such identification does not adversely affect the other clientele. Italy is the market with the highest percentage of professionals who do not know how to answer (30%).



- Yes
- No, I don't think so

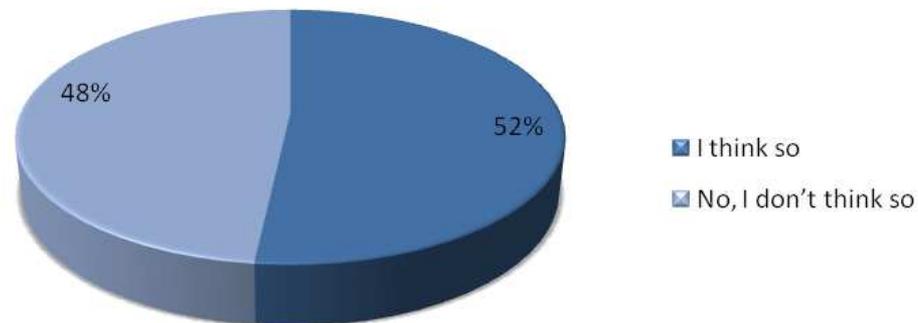


3. The importance of specialising in LGBT tourism

Do you think LGBT tourism requires **specific travel packages**?

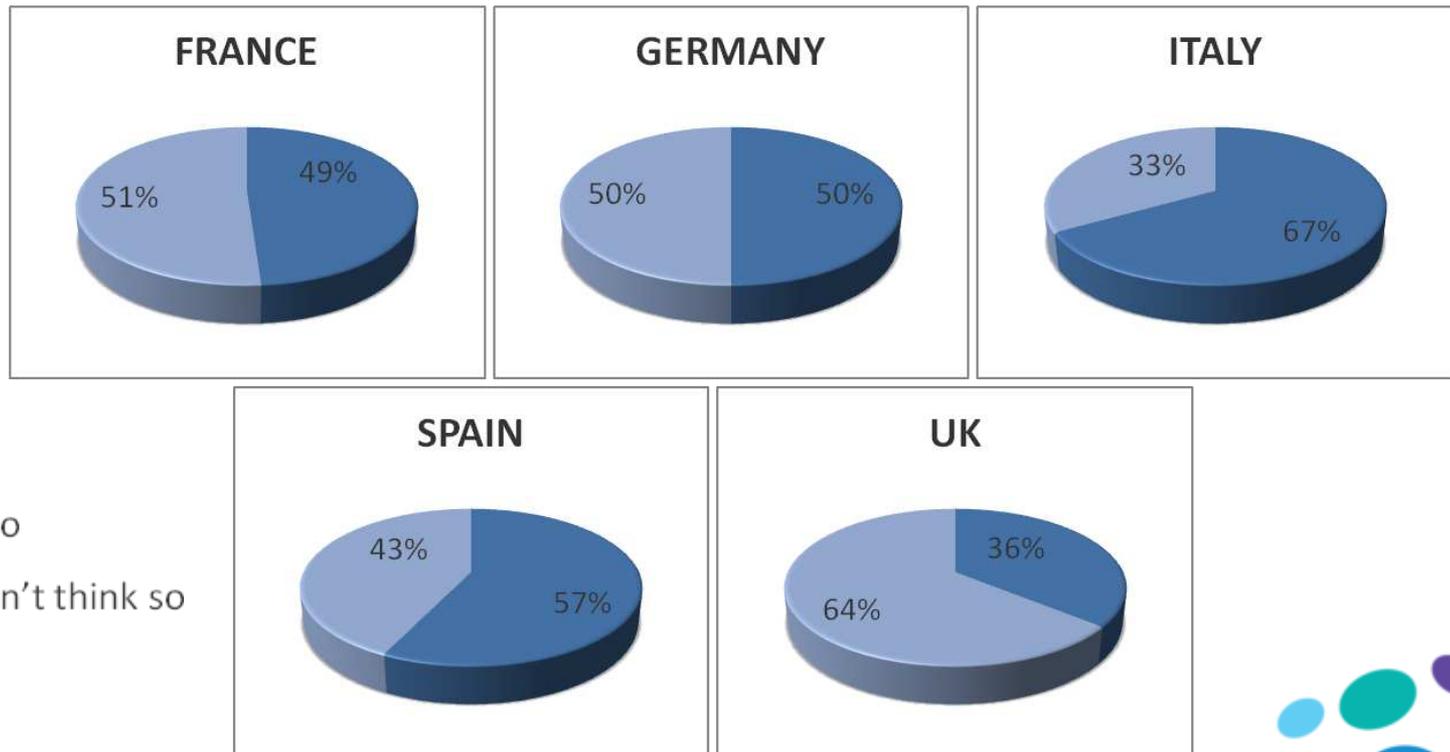
The response is almost evenly divided between those who believe that it is important to have specialised products (52%) and those who believe that there is no need (48%).

Do you think LGBT clients require specific travel packages?



3a. The importance of specialising in LGBT tourism - market cross-section

Italy (67%) and Spain (57%) are in favour of specific products. Germany is evenly divided at 50%. The UK (64%) and France (51%) do not think that specialisation is necessary.



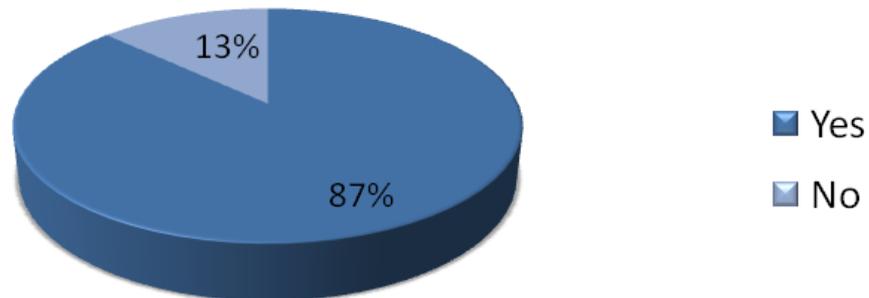
- I think so
- No, I don't think so



4. Information on LGBT products

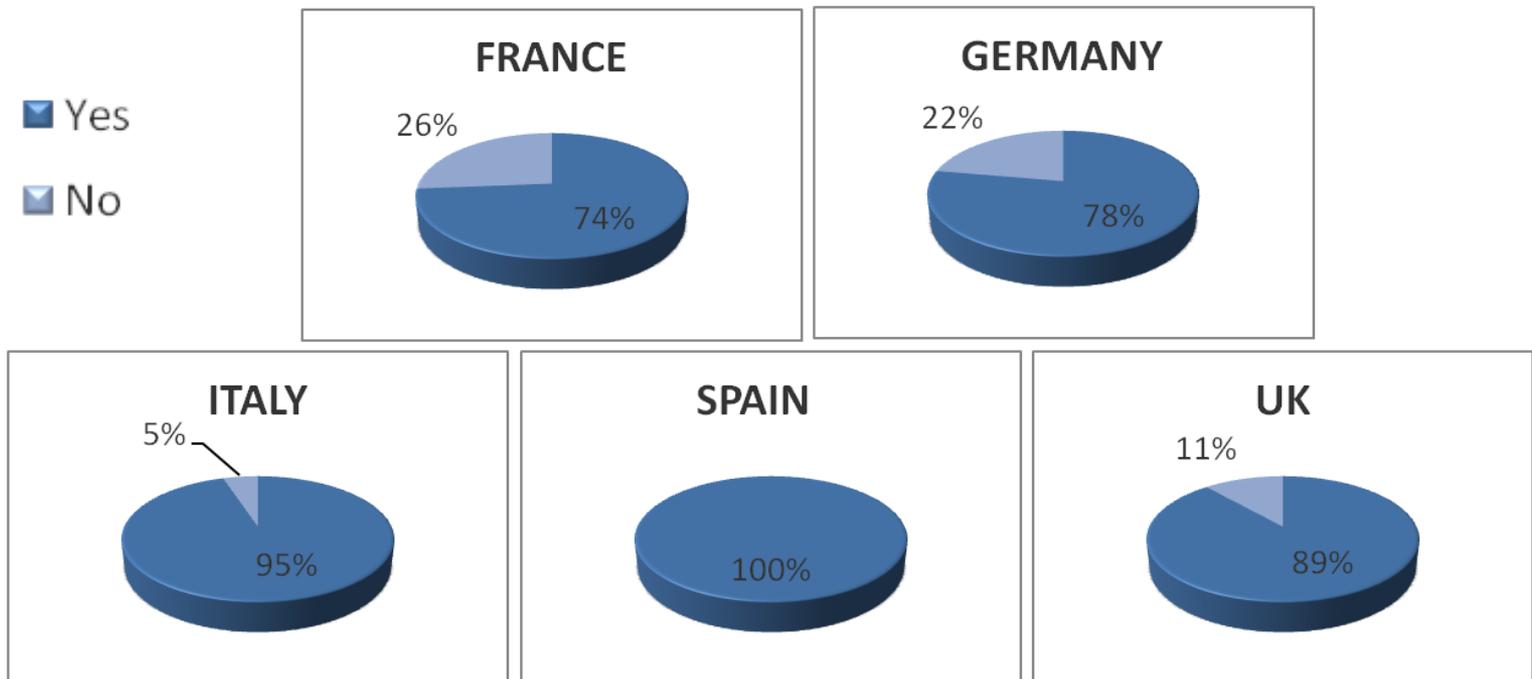
87% of respondents would like to increase their knowledge about gay-friendly products.

Would you consider it to be useful to know more about gay friendly products?



4a. Information on LGBT products market cross-section

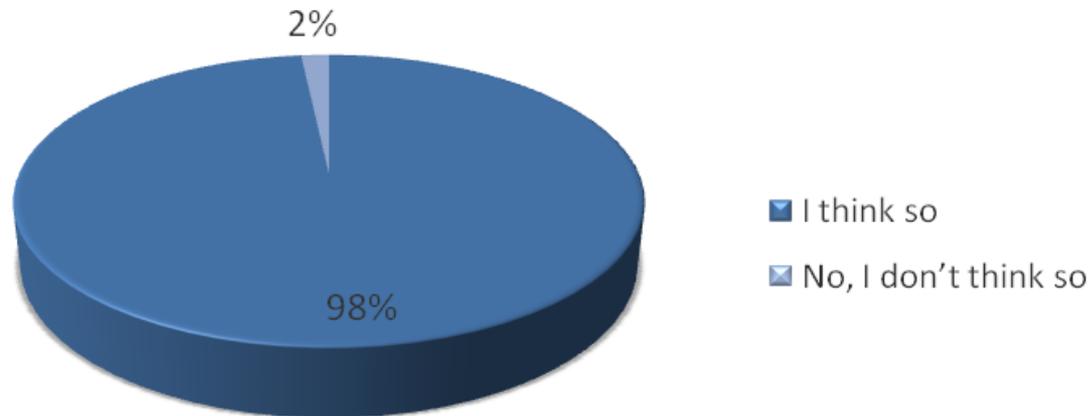
France seems to be the market that is least interested in focusing on LGBT products (26%), followed by Germany (22%). Spanish professionals are unanimously interested; Italians for 95%.



5. Expectations

Almost all respondents believe that the LGBT travel segment will grow in the near future.

Do you think this segment will increase?





Conclusions

1. The LGBT travel segment

- Travel professionals recognise the existence of the LGBT travel segment
- A majority believe that this segment requires specific packages and services, although at the moment, only 1/3 of travel agents apply to specialised tour operators
- Just over half of respondents believe that it is important to be labelled as a gay-friendly agency in order to attract LGBT customers
- There is unanimity in recognizing the LGBT segment as growing; 8 out of 10 professionals would like to receive more information about it
- Preferred destinations are: Mykonos, Gran Canaria, Ibiza, Spain and Thailand. Among the trendiest cities: New York, Barcelona and Berlin



2. The LGBT clientele

-
- With the exception of the UK, most LGBT customers do not request gay friendly venues
 - Most consumers spend between € 1,500 - € 2,500 per person per trip
 - In general, the LGBT customer is usually loyal to the same destination





Thank you.