

LGBTQ Leisure Travel to Britain



LGBTQ Leisure Travel to Britain



Please note that this is a summary report of the research.

A full 125 slide report is available with additional questions, data and more in-depth analysis and narrative.

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Executive Summary

Britain's Competitor Set

- Britain is the top European destination for LGBTQ leisure travelers.
- Competition for LGBTQ leisure travel is substantial. Major barriers include cost, previous visitation, competitive alternative destinations and lack of knowledge of Britain and its surrounding areas.
- Britain is considered LGBTQ-welcoming and safe, outperforming the majority of European competitors.

LGBTQ Travel Patterns

- Britain's major origin states/provinces from North America include California, New York, Florida, Ontario and British Columbia.
- Leisure travel to Britain is key but family/friend and business travel are also important.
- LGBTQ travel to Britain is London centric driven by gay men's established preference for urban travel.
- Woman LGBTQ have strong interest in travel to Scotland, Britain's countryside and outdoor activities. They on average stay for longer and have a higher propensity to visit friends and family.

Diversity of LGBTQ Visitors

- LGBTQ visitation to Britain is strong across all age groups.
- Britain attracts a significantly greater number of gay and bisexual men than lesbian and bisexual women, especially among older generations.
- Gay and bisexual women are more likely to be in a relationship than men leading to a greater proportion of men travelling solo or with friends.
- Visitation points to strengths within White and Asian communities but lags for Black and Latino travelers.

Top Motivators to Visit Britain

- Historical attractions are more motivating than anticipated and scenic beauty is key.
- LGBTQ-specific attractions are motivating but are not the top priority when visiting Britain.
- Theatre trips amongst older gay men can drive repeat visits.
- Against general assumptions, shopping underperforms within the LGBTQ community and is not a primary travel motivator.
- LGBTQ Millennials are attracted to quirky and different attractions and experiences.

Communicating with the LGBTQ Community

- VisitBritain's LGBTQ outreach strategy is working in influencing LGBTQ travelers to consider visiting Britain.
- It is important to combine LGBTQ-specific and general imagery/information within campaigns, the vast majority of the community expect it.
- LGBTQ community members do not all consume the same media as a group. Age and gender often determines the preferred media.

Canadian LGBTQ Leisure Travel to Britain

- Canadian and US travelers are similar in their motivations for travel.
- The study noted however some key differences between the markets within regards to travel behaviors and perceptions of Britain.



Pre-Research

Community Marketing & Insights' LGBTQ Tourism & Hospitality Survey

LGBTQ Market Intelligence Report
Research Conducted 2017-2018



SUMMARY OF PRE-RESEARCH



CMI's **LGBTQ Tourism & Hospitality Survey** is an online survey that has been conducted annually for 22 years. The study uses CMI's LGBTQ research panel along with invitations to readers of important LGBTQ travel print and digital media. The below results focuses on United States averaged data from the 2017 and 2018 survey, as well as early 2018 Canadian data.

- › Britain is the most popular European destination for United States LGBTQ travelers, followed closely behind by France, then Italy, Germany, Spain and Netherlands. Among LGBTQ Canadians, Britain and France are virtually tied for visitors, with other European countries lagging.
- › Britain has competition from many other international destinations.
 - **Tier 1 Competition:** The many major cities in North America (cross-border travel), Puerto Vallarta and France
 - **Tier 2 Competition:** Italy, Spain, Germany and Hawaii
 - **Tier 3 Competition:** Netherlands, Ireland, Greece and Cancun
- › Britain's LGBTQ visitors are reasonably equal by generation. While visitors do trend somewhat older for Britain and other European countries, Britain's under age 35 visitor numbers are solid.
- › Britain attracts a significantly greater number of gay and bisexual men than lesbian and bisexual women, especially among older generations. The same is true for other European countries. The gender differences in visitation may be stronger for United States travelers than Canadian travelers.
- › CMI analyzed Britain's visitor pick-up by state/province, but also in relation to state population. The results for the strongest markets were California, New York, Illinois, Florida, Washington DC and Massachusetts in the USA, and Ontario and British Columbia in Canada.
- › Georgia, Pennsylvania and Alberta visitation was more in line with population expectations. While Britain receives visitors from Texas, Ohio, Michigan and Quebec, visitation underperforms in relation to the size of the LGBTQ community and state populations.

USA LGBTQ Leisure Visitors to Britain and Other Major European Destinations Demographic Analysis • 2017-2018

	Weighted							Unweighted
	All LGBTQ Weighted	Gay & Bi Men	Lesbian & Bi Women	Gender Expansive	Millennials	Gen X	Boomers	All LGBTQ Unweighted
Great Britain	6.5%	8.4%	5.1%	2.9%	6.2%	6.5%	6.9%	7.3%
France	5.6%	7.5%	4.2%	1.8%	5.2%	5.5%	6.3%	6.3%
Italy	4.4%	5.7%	3.3%	2.2%	3.8%	3.9%	5.5%	4.9%
Germany	4.0%	5.7%	2.4%	2.1%	3.3%	3.8%	4.8%	4.6%
Spain	3.9%	6.3%	1.8%	1.0%	3.6%	3.5%	4.6%	4.8%
Netherlands / Holland	2.9%	4.1%	1.9%	0.8%	2.2%	3.0%	3.5%	3.3%
Ireland	2.4%	2.3%	2.5%	1.3%	2.4%	2.1%	2.5%	2.4%

Source: CMI's 22nd and 23rd Annual LGBTQ Tourism & Hospitality Survey
Annual average of 2017 and 2018 data. Base: n=9,412

Canada LGBTQ Leisure Visitors to Britain and Other Major European Destinations 2018

	Weighted					
	All LGBTQ Weighted	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Baby Boomers
France	6.3%	7.8%	5.1%	7.1%	6.5%	5.3%
Great Britain	6.1%	6.8%	5.4%	6.5%	5.8%	6.0%
Spain	3.7%	5.3%	2.6%	4.4%	4.3%	2.5%
Italy	3.7%	4.3%	3.3%	2.6%	4.9%	3.6%
Netherlands/Holland	2.8%	3.0%	2.7%	3.3%	2.8%	2.3%
Germany	2.4%	3.3%	1.7%	3.4%	2.1%	1.8%
Ireland	1.7%	1.8%	1.5%	2.0%	1.7%	1.4%

How Britain Compares to Non-European Destinations

USA LGBTQ Leisure Travelers 2017-2018 (Weighted)

New York City	18.9%	Vancouver	3.8%
Los Angeles	14.1%	Cancun	3.7%
San Francisco	13.7%	Montreal	3.4%
Washington, DC	12.9%	Mexico City	2.2%
Las Vegas	12.5%	Japan	1.7%
Chicago	11.6%	Australia	1.6%
Orlando	10.4%	Thailand	1.4%
Fort Lauderdale	8.8%	Costa Rica	1.4%
Seattle	8.7%	Hong Kong	1.1%
Miami	7.5%	China	0.9%
Great Britain	6.5%	Argentina	0.7%
Hawaii	5.8%	Brazil	0.7%
Puerto Vallarta	4.7%	India	0.5%
Toronto	3.9%		

Canada LGBTQ Leisure Travelers 2018 (Weighted)

Toronto	20.4%	Hawaii	2.9%
Montreal	17.5%	Chicago	2.9%
Vancouver	15.4%	Costa Rica	2.0%
New York City	10.3%	Australia	1.7%
Las Vegas	7.8%	Japan	1.3%
Seattle	7.5%	Washington, DC	1.3%
Puerto Vallarta	6.1%	Hong Kong	1.3%
Great Britain	6.1%	Thailand	1.3%
Cancun	5.8%	Mexico City	1.0%
San Francisco	5.0%	India	0.8%
Fort Lauderdale	4.6%	Brazil	0.7%
Los Angeles	4.4%	China	0.7%
Miami	4.0%	Argentina	0.4%
Orlando	3.0%		



VisitBritain®

LGBTQ Leisure Travel to Britain

Custom Research Methodology

LGBTQ Market Intelligence Report



RESEARCH METHODOLOGY



ABOUT THE RESEARCH

The 20-minute online survey conducted from October 24 to November 5, 2018 by Community Marketing & Insights (CMI).

Importantly, this project had a targeted invitation methodology focusing on known or probable LGBTQ international travelers from CMI's research panel. The goal of this research was not to obtain representational options from the entire LGBTQ community, but to gain information from LGBTQ Britain visitors and potential visitors.

Early in the survey, if a participant indicated that they did not have international travel history in the past three years, and do not plan to travel internationally for the next three years, the participant was terminated.

Results are presented unweighted as the natural demographic breakdown was reasonable and because weighting in the LGBTQ community is difficult due to lack of U.S. Census data for the LGBTQ community.



LGBTQ PARTICIPANTS

The research used a targeted sub-sample of CMI's internal 90,000+ member LGBTQ research panel. The Community Marketing & Insights LGBTQ research panel was built over a 25-year period with the partnership of over 300 LGBTQ media and events, and represents LGBTQ community members who are "out" and interacting within the LGBTQ community.

A total of 2,103 LGBTQ community members living in the United States and Canada participated in the research (1,556 or 74% USA and 547 or 26% Canada).

The group was divided into two categories:

LGBTQ Britain Visitors, n=549 USA and 173 Canada: Defined as participants that visited Britain in the past five years for leisure travel.

LGBTQ Britain Non-Visitors, n=1,007 USA and 374 Canada: Defined as participants that have international travel history/plans, but have not visited Britain in the past five years for leisure. They may have visited Britain for other reasons in the past five years or before the five-year mark.

UNITED STATES/CANADA PARTICIPANTS UNWEIGHTED

Gender	US	CA
Gay and bisexual men	54%	58%
Lesbian and bisexual women	40%	37%
Transgender and non-binary	6%	5%

Age	US	CA
18 to 34 (limited representation under age 21)	32%	32%
35 to 54	38%	41%
55+ (limited representation over age 70)	30%	27%

Parents	US	CA
Parents of children under age 18	7%	7%

Ethnicity / Race	US	CA
White / Non-Hispanic	66%	80%
Latinx / Hispanic	13%	3%
Black / African American	10%	2%
Asian / Pacific Islander	6%	8%
Mixed	5%	4%
Other or prefer not to state	3%	3%

Household Income	US	CA
Under \$50,000	18%	19%
\$50,000 to \$99,999	30%	31%
\$100,000 to \$199,999	32%	33%
\$200,000 or more	12%	8%
Prefer not to state	8%	9%

Relationship	US	CA
Single/dating not living together	44%	49%
Partnered and living together	17%	17%
Married	37%	21%
Domestic partnership/civil union	1%	10%
Other	1%	3%
Prefer not to state	0%	0%

Employment	US	CA
Employed full or part-time	67%	64%
Self-employed	9%	10%
Retired	13%	14%
Student	5%	6%
Other or prefer not to state	6%	6%



United States Results

Britain and Its Competitor Set

LGBTQ Market Intelligence Report



Britain and Its Competitor Set

Britain is the Top European Destination for LGBTQ Travelers

As indicated in the pre-research and the custom research Britain is the top European destination for LGBTQ travelers.

Barriers to LGBTQ Visitation

Despite Britain's success, competition for the LGBTQ traveler is substantial. LGBTQ community members are traveling to many parts of Europe and the rest of the world. The major barriers to LGBTQ visitation include:

- **Expense:** Britain and other European destinations are more expensive than international travel options within the USA/Canada/Mexico region.
- **Been There, Done That:** A high percentage (62%) of LGBTQ travelers in the research have already visited Britain (for any reason). 39% in the past five years.
- **Competition from Other Destinations:** The LGBTQ market is very desirable for the travel industry and LGBTQ community members receive marketing messages from many competing destinations.
- **More Education Needed:** Participants seemed London focused and needed more education on what to do in the rest of Britain.
- **Assumptions:** There were two assumptions about Britain that discouraged travel. First, that Britain is too culturally similar to home, Second, some thought Britain has bad weather.

Britain is Considered LGBTQ-Friendly and Safe

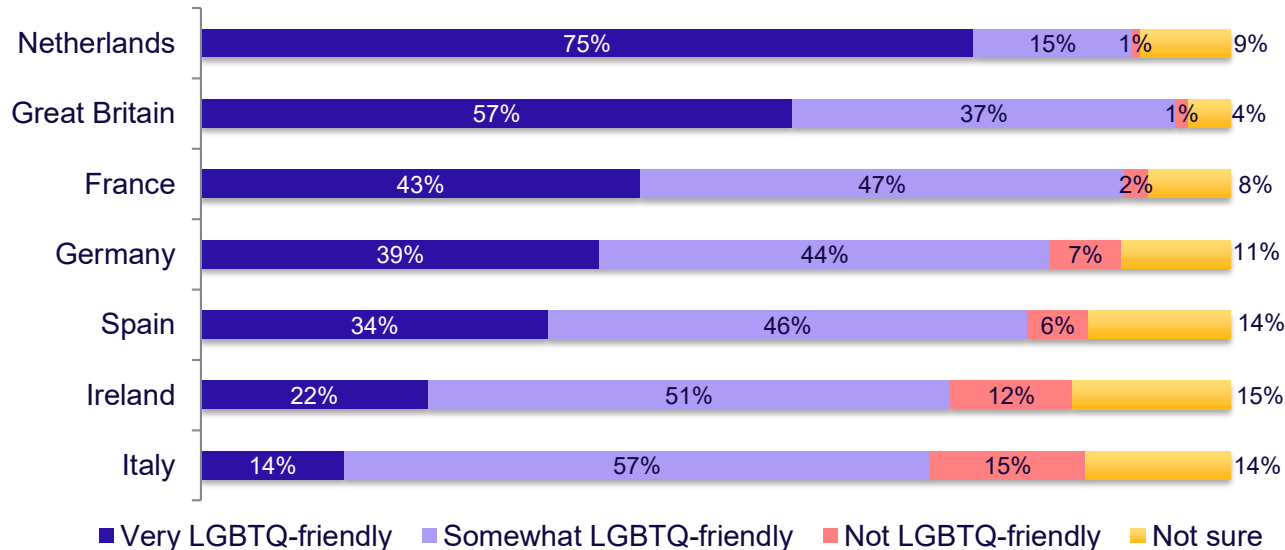
The vast majority of LGBTQ community members in the United States and Canada perceive Britain as being both LGBTQ-welcoming and safe for travel. Britain outperforms most other European destinations for both safety and being considered LGBTQ-friendly, with only the Netherlands scoring higher.

Recommendations

- Do not let success give a false sense of security. Other destinations within Europe and around the world are actively marketing to the LGBTQ community. Dropping out or reducing activity in the LGBTQ market while on top will just open the door for competing destinations.
- Money matters in a competitive environment. Participants indicated that they want to hear about hotel and air deals to Britain. The right offer can motivate a booking.
- Britain needs to develop/promote new experiences within the country to compete with the lure of going someplace new. Many LGBTQ travelers have not explored outside of London. Britain can provide fresh reasons to visit London again and/or promote the attraction and ease of new experiences outside of London. Qualitative research could be useful to address this barrier.
- Britain is likely to be advertising to LGBTQ readers who have already been to Britain. That may change promotional approaches.

LGBTQ-Welcoming Rating: Of the countries tested, Britain ranks second behind the Netherlands as being most LGBTQ-welcoming. Overall, each of the countries ranks at least somewhat LGBTQ-welcoming. Britain underperforms with women and non-visitors. For very LGBTQ-friendly Britain compares well (57%), compared to the average of the competing destinations (38%).

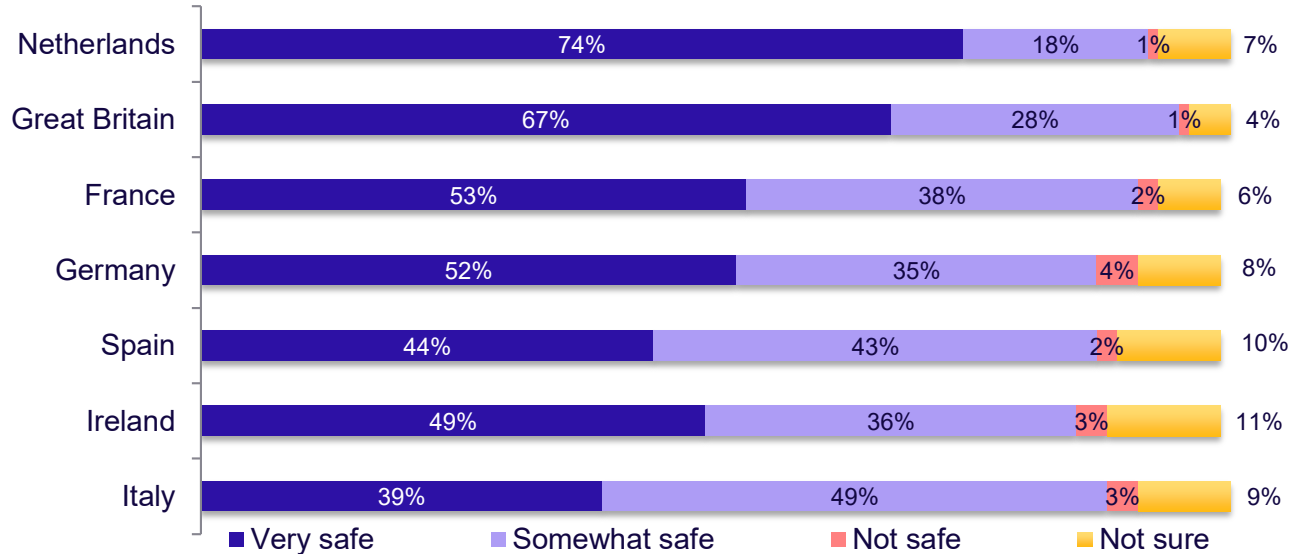
When you think about these European travel destinations, which do you consider an LGBTQ-welcoming place for travel?



Great Britain Very LGBTQ-friendly	
Visitors	69%
Non-Visitors	51%
All Men	67%
All Women	47%
All 18-34	58%
All 35-54	56%
All 55+	59%
All White	58%
All Non-White	57%

Safety Rating: Of the countries tested, Britain ranks second behind the Netherlands as the country considered as safest for LGBTQ travelers. Overall, each of the countries ranks as quite safe, and LGBTQ travelers do not seem to have a big concern about traveling to any of these European countries. Similar to the LGBTQ-friendly question, there is a big gap by gender. Safety is an important consideration for all women regardless of their sexual orientation. For very safe, Britain compares well (67%) compared to the average of the competing destinations (52%).

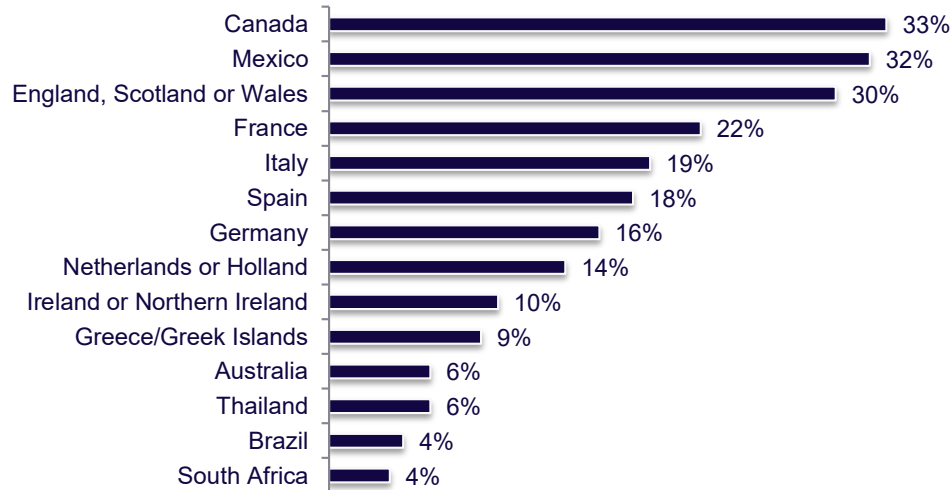
As an LGBTQ traveler, how safe do you consider these European travel destinations to be?



Great Britain Very Safe	
Visitors	80%
Non-Visitors	60%
All Men	74%
All Women	59%
All 18-34	70%
All 35-54	65%
All 55+	67%
All White	69%
All Non-White	65%

Participant's International Travel Experience: This chart reviews Britain's main competitors for international travel. Not surprisingly, Canada and Mexico are the most popular. Of European competitor destinations, France, Italy and Spain were most popular for visitation. The data also shows that gay and bisexual men are more likely to be international travelers than lesbian and bisexual women.

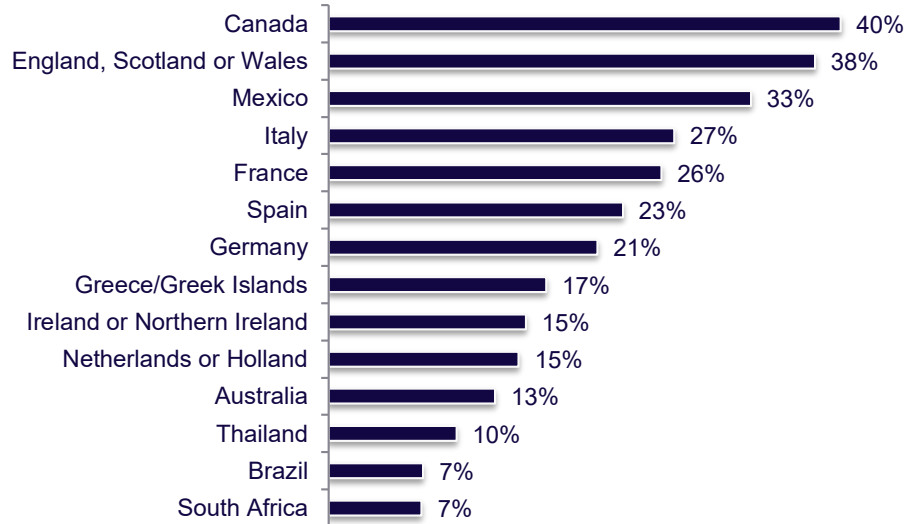
Have you visited any of these travel destinations in the past three years, for vacation or leisure travel?
All Participants



Top Destinations		
Country	Men	Women
Canada	34%	31%
Mexico	37%	26%
England, Scotland or Wales	37%	25%
France	27%	18%
Italy	23%	15%
Spain	24%	11%
Germany	20%	11%

Where Visitors to Britain Are Going in the Future: For the LGBTQ participants in this survey, Britain ranks strongly compared to the international competition, especially for men. Other European competitor destinations lag compared to Britain. Interest in Britain is relatively consistent across age group.

Realistically, do you expect to visit any of these countries in next three years, for vacation or leisure travel?
All Participants



Top Destinations					
Country	Men	Women	18-34	35-54	55+
England, Scotland or Wales	43%	32%	35%	40%	37%
Canada	41%	39%	46%	40%	35%
Mexico	38%	26%	36%	36%	25%
Italy	32%	22%	24%	28%	30%
France	31%	21%	23%	26%	30%
Spain	30%	16%	21%	25%	23%
Germany	26%	15%	21%	20%	22%

**When you think about a vacation to Great Britain, which of the following might prevent you from taking the trip?
(Mark any that are a major concern for you.)**

Among Non-Visitors



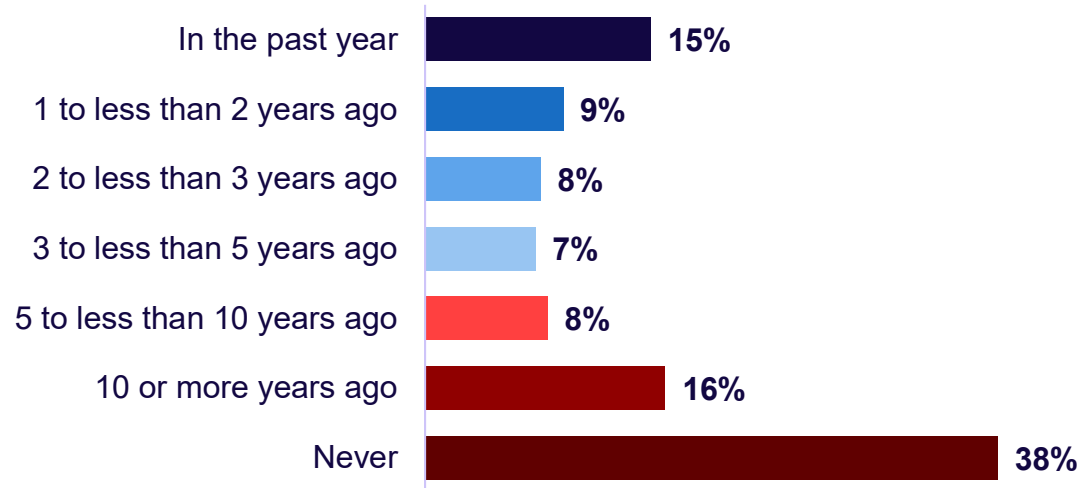
The same question was asked of visitors. The top 4 reasons for visitors were:

- Other destinations interest me more, 46%
- Too expensive, 44%
- Interested in Britain, but no urgency to return soon, 32%
- Britain not a good value compared to other trips, 20%

History of Visiting Britain: The vast majority of participants have been to Britain at least once in their lifetime. This has implications for outreach strategies, especially with so much destination competition within the LGBTQ market.

When was the last time you visited any destination in Great Britain for any reason?

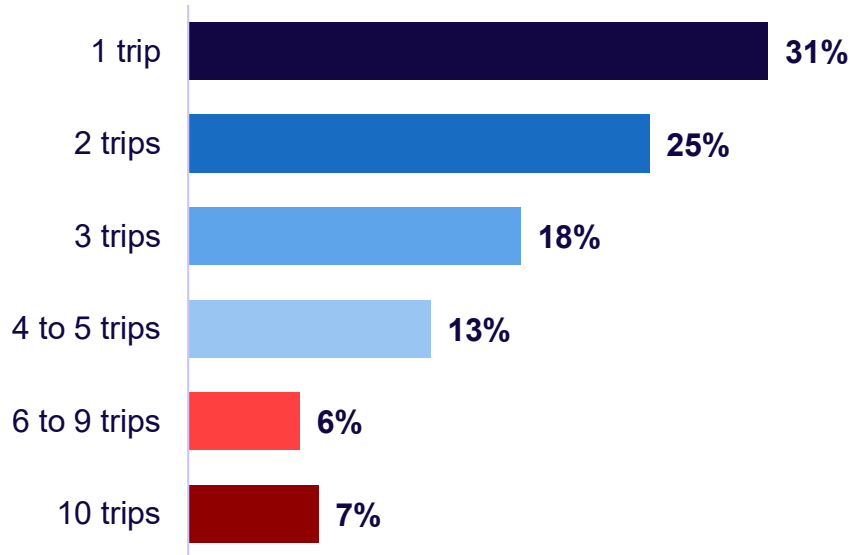
All USA Participants, Both LGBTQ visitors and non-visitors with a history/interest in international travel



Repeat Visitation: Of the Britain leisure visitors in the research, 69% have visited more than once in the past ten years.

How many times have you visited Great Britain in the past 10 years just for vacation or leisure travel?

Among Leisure Visitors in Past Five Years





VisitBritain®



United States Results

Understanding LGBTQ Travel Patterns to Britain

LGBTQ Market Intelligence Report



Understanding LGBTQ Travel Patterns to Britain

Top LGBTQ Origin Markets

Britain's major origin states/provinces from North America are California, New York, Florida, Ontario and British Columbia. Illinois had mixed results in the data but is most likely a top market. Massachusetts and District of Columbia are small in population size but provide good visitation numbers. Texas delivers a good number of visitors but underperforms compared the state's overall population. The strongest LGBTQ origin markets are similar as for the general traveler population.

Leisure, Family/Friends and Business Visits Are All important

While LGBTQ travel to Britain is primarily for leisure, visiting family/friends (especially LGBTQ friends) and business travel are also important.

The Strength of the Shoulder Season

In this and other CMI destination research, the LGBTQ community often proves to be strong for shoulder season travel.

LGBTQ Visitation is London / Urban-Focused

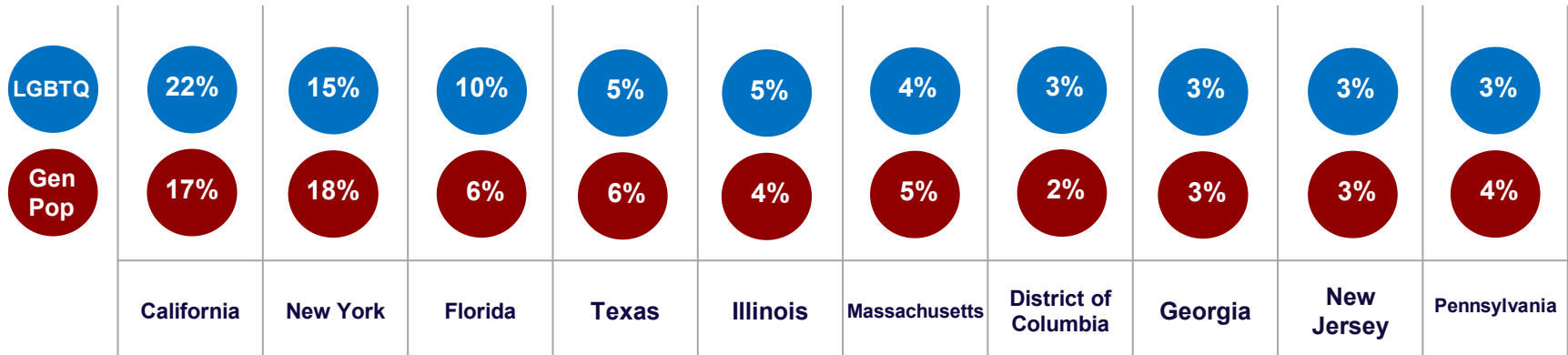
LGBTQ community travel to Britain is London centric accounting with 85% having spent one night or more in the capital. This is largely being driven by gay men's established preference for urban travel. After London, the next most popular city was Edinburgh at 17%. Then all other destinations within Britain are single-digit percentages for visitation.

Recommendations

- LGBTQ and non-LGBTQ visitors are coming from similar target markets. Remember that any campaign in a metro area is talking to both LGBTQ and non-LGBTQ audiences. Don't be afraid to include some LGBTQ imagery/messages within the overall "general population" campaign. CMI research shows that this can be powerful, and demonstrates that you are not afraid to let everyone, gay or straight, know that you support LGBTQ visitation.
- The research points to LGBTQ friends being an important reason to visit Britain. LGBTQ community members living in Britain may well be your most important influencer group, and strategies and resources can be developed to mobilize this asset.
- One of the reasons for shoulder season strength is the comparatively low percentage of LGBTQ parents. LGBTQ travelers often have more professional and family flexibility to travel in spring and fall. Shoulder season offers the LGBTQ community good weather, better prices, and there is often more opportunity to interact with LGBTQ locals.
- If VisitBritain strives for more visitation beyond London, the research points to women being more open to countryside trips, outdoor adventure trips and visiting Scotland. Gay men might be better approached with a dual experience of a new urban center with perhaps a non-urban experience that focuses on the arts or history. Also, repeat LGBTQ visitors tend to be more interested in exploring beyond London.

Comparing LGBTQ vs. Gen Pop by State: Comparing the LGBTQ data to the VisitBritain's IPS 2017, we see the similar visitation patterns by state. Perhaps California and Florida visitation are a little stronger within LGBTQ, and perhaps New York is a little stronger for the general population, but it is hard to make those conclusions due to data collection differences. The overall result is that the pattern is similar and LGBTQ does not make an important difference in visitation by feeder state.

State Breakdown of LGBTQ vs. General Population Britain Visitors from USA



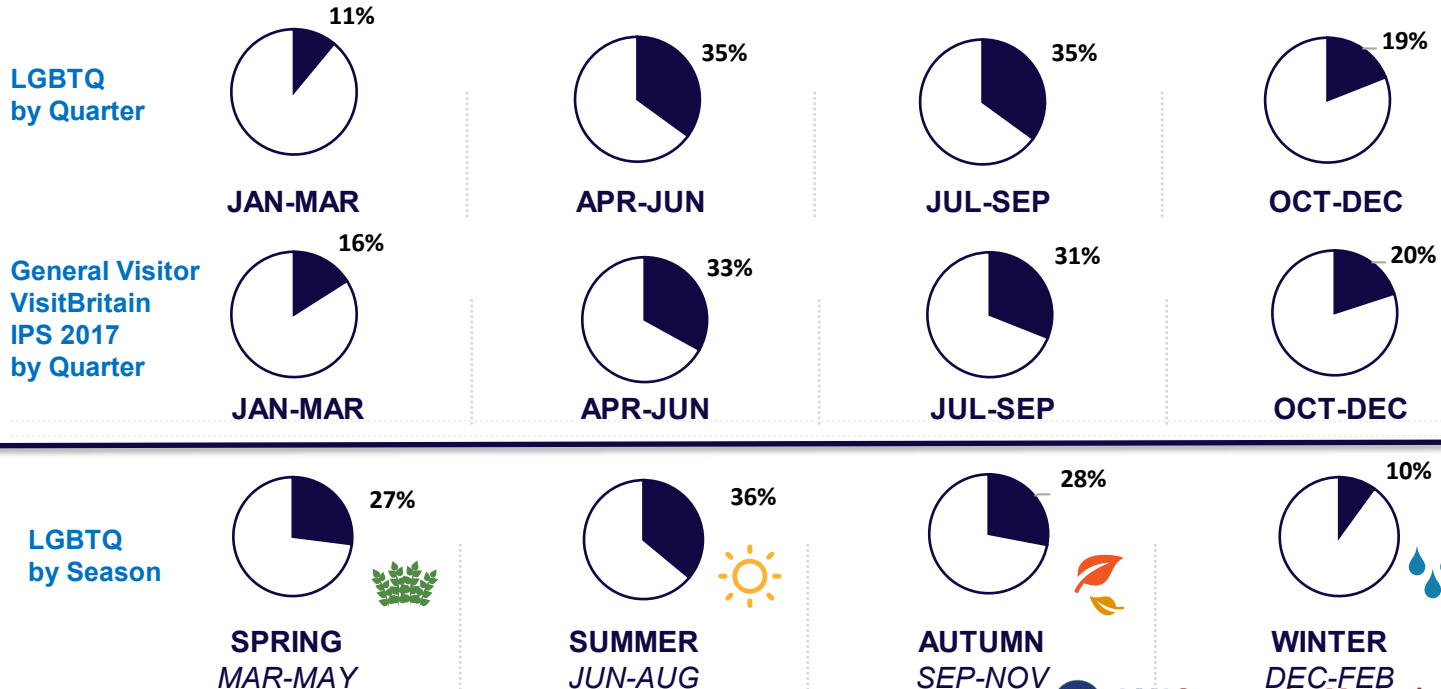
Reason for Visit: While participants visited Britain mainly for leisure, visiting friends and business reasons were not insignificant. For British leisure travelers, visiting an LGBTQ or straight friend was 23%, making the combined percentage higher than business travel.

**Thinking about your last trip to Great Britain, what was the main reason for your visit?
(Choose multiple reasons if they are equally important.)**

Visitor Segments	Britain Leisure Visitors in Past 5 Years (Last Trip to Britain)					
	All LGBTQ	Male	Female	18-35	35-54	55+
Vacation travel	87%	85%	91%	84%	85%	91%
Business travel	15%	18%	10%	11%	22%	12%
Visit LGBTQ friends	16%	17%	14%	16%	19%	12%
Visit straight friends	12%	12%	12%	17%	12%	7%
Visit family	10%	8%	14%	12%	11%	8%
Education or academic	7%	5%	10%	13%	5%	3%
Attend an LGBTQ event	5%	5%	3%	5%	6%	3%
Other	3%	2%	5%	4%	2%	4%
Base	549	362	172	163	205	181

Month and Season of Visit: Visitation was across all four seasons, with a clear preference to avoid winter. Shoulder seasons of spring and autumn were strong creating opportunity for off-peak travel.

What month of the year did you visit Great Britain?



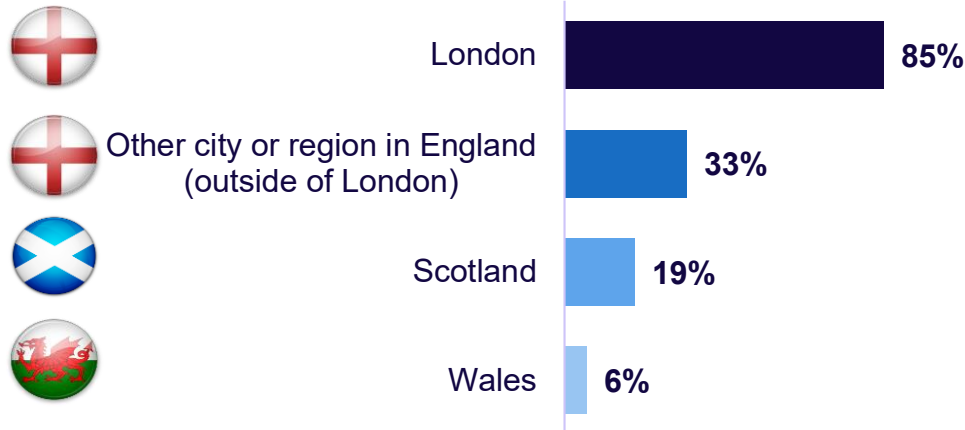
Base: Unweighted USA Britain LGBTQ Visitors n=549, General population data based on 3,910,000 visitors

Instruction: If your visit spans more than one month, choose the beginning date of the trip.

LGBTQ Visitor Regional Spread within Great Britain

During your most recent trip to Great Britain, what areas did you spend at least one overnight stay?
(Please mark any that apply.)

USA Britain Visitors



Gender		Age Groups			Ethnicity	
Male	Female	18-34	35-54	55+	White	Non-White
90%	76%	85%	86%	85%	83%	89%
29%	38%	30%	30%	38%	33%	31%
18%	20%	17%	16%	24%	21%	14%
5%	8%	4%	8%	7%	7%	5%

PAST VISITS: During your most recent trip to Great Britain, what areas did you spend at least one overnight stay?



# of Travelers	# of Travelers	% of All Britain Visitors
London	468	85%
Bath	37	7%
Manchester	32	6%
York	20	4%
Liverpool	19	3%
Cambridge	17	3%
Oxford	17	3%
Cornwall	16	3%
Southampton	15	3%
Brighton/Hove	13	2%
Bristol	11	2%
Lake District	10	2%
Devon	9	2%
Birmingham	8	1%
Other region in England	63	11%



Scotland Destinations	# of Travelers	% of all Britain Visitors
Edinburgh	94	17%
Inverness/Highlands/Loch Ness	39	7%
Glasgow	36	7%
Fort William	9	2%
St Andrews	9	2%
Aberdeen	5	1%
Dundee	3	1%
Other region in Scotland	22	4%



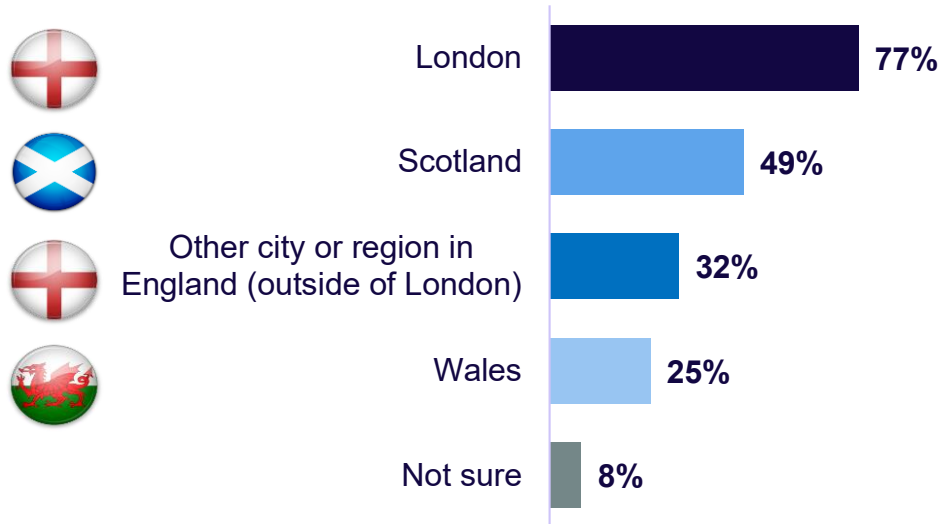
Wales Destinations	# of Travelers	% of all Britain Visitors
Cardiff	18	3%
Pembrokeshire	5	1%
Swansea	5	1%
Snowdonia	4	1%
Other region in Wales	8	1%

Note: Above does not include day trips.

Base: Unweighted USA Britain Visitors n=549, Note low N for many destinations

Non-Visitor Future Visits: For all travel research, there is often a disconnect between intention and actual behavior. VisitBritain should not expect these regional dispersion figures to reflect future travel. However, they may be an indication of what is of most interest to participants.

Where do you want to visit on your first or next trip to Great Britain? (Please mark any that apply.)



Gender		Age Groups			Ethnicity	
Male	Female	18-34	35-54	55+	White	Non-White
85%	71%	83%	77%	70%	74%	83%
44%	52%	47%	46%	55%	55%	35%
31%	32%	25%	30%	44%	37%	23%
21%	29%	22%	26%	28%	29%	17%
5%	11%	7%	9%	7%	8%	8%



Understanding Diversity of LGBTQ Visitors

LGBTQ Market Intelligence Report



Understanding Diversity of LGBTQ Visitors

Visitation is Strong Across Age Groups

LGBTQ visitation to Britain is strong across all age groups. While LGBTQ visitation by age does trend a little older for Britain and most European destinations, the Britain visitation for under age 35 is strong compared to other destinations.

Strength for Gay Men / Weakness for Lesbians

Britain attracts a significantly greater number of gay and bisexual men than lesbian and bisexual women, especially among older generations.

Lesbians Show Some Strengths for Longer Trips

While lower on overall numbers, women show strength in two important areas, travel to Scotland and Britain's countryside and a higher number of nights per visit. However, lesbians have higher rates of visiting and staying with friends while in Britain.

There Are Many Single Travelers in the LGBTQ Community

Within the LGBTQ community, at any given moment, lesbian and bisexual women are more likely to be in a relationship than gay and bisexual men. This carries through to all generations, but the gap is widest for Millennials. This creates a dynamic where many gay men are either single travelers or traveling with friends.

Supporting Transgender Travelers is Important

The transgender/non-binary community is a small part of the LGBTQ community (5% to 8%) and they face significant challenges for international travel. It is unlikely that the transgender community will be a primary market for Britain visitors. However, this does not mean that outreach to and meeting the needs of transgender travelers is not important.

Visitation Lags for Black and Latino Travelers

For the United States, the research points to strength in attracting White and Asian travelers, some weakness in attracting Latino travelers, and great weakness in attracting Black travelers.

Each Segment Within LGBTQ Travels Differently

Some view the LGBTQ market as one group traveling in one direction. In reviewing the report, we see that LGBTQ travel looks different when you analyze by gender and generation. This has important marketing implications.

Gay Men Will be Britain's Primary Visitors in the Near Future

Any outreach strategy to lagging LGBTQ segments will take time to show results. Gay and bisexual men will remain Britain's primary visitor for the near future.

Continued on next slide

Understanding Diversity of LGBTQ Visitors (Continued)

Recommendations

- The LGBTQ community is quite diverse and their travel motivations can be very different by gender and generation. VisitBritain can develop different messages depending on the media and target group within LGBTQ.
- As a resource decision, VisitBritain can continue to invest in what's working or attempt to boost market share from lagging segments. To be successful in underperforming markets, VisitBritain must commit. For example, if you want to reach the women's market, you need to invest in specific women's media and events.
- Many destinations overuse same-sex couple and/or romance imagery. It could be sending the message that your destination is just for couples. Destinations can not assume their gay male visitors are part of same-sex couples. Many men travel as singles, or with groups of friends, or extend business trips for leisure purposes.
- Outreach strategies and policy decisions that are transgender inclusive and welcoming are very important to an overall LGBTQ outreach strategy. Specific transgender outreach and the promotion of trans-friendly laws and policies shows the entire LGBTQ community that a marketer is authentically progressive and welcoming.
- VisitBritain needs to take care that as resources are used to expand lagging LGBTQ segments, it does not result in a reduction in energy for the already successful men's market.

Five Year Visitation Percentage by Segment: Here we look at all the participants in the study to determine visitation rates by segment percentage. Again, the chart demonstrates Britain visitation strength for gay and bisexual men. Visitor percentages were somewhat higher by age, but differences were not extreme.

Visited Britain in Past Five Years for Leisure Travel Percentage Breakdown by Segment

43%	27%	33%	35%	39%	37%	24%	33%	42%	32%	38%
Gay and Bi Men	Lesbian and Bi Women	18 to 34	35 to 54	55+	White	Black	Latino	Asian	Single	Relationship
362 of 838 Participants	172 of 626 Participants	163 of 501 Participants	205 of 587 Participants	181 of 468 Participants	386 of 1,031 Participants	38 of 160 Participants	68 of 209 Participants	38 of 91 Participants	218 of 689 Participants	330 of 860 Participants

Gender Expansive (16%)
15 of 92 Participants.

Gender Comparisons: Looking at gay/bisexual men vs. lesbian/bisexual women, we observe a reverse dynamic by gender and the results are similar to CMI's Annual LGBTQ Travel & Hospitality Survey. For gay and bisexual men, LGBTQ visitation to Britain increases with age. For lesbian and bisexual women, visitation seems to decrease somewhat with age.

Gender / Age Breakdown of LGBTQ Britain Visitors from USA

% of Visitors in Segment Compared to Total Participants in Segment

37%	44%	48%	31%	26%	25%
Male 18-34	Male 35 to 54	Male 55+	Female 18-34	Female 35 to 54	Female 55+
88 Visitors	139 Visitors	135 Visitors	69 Visitors	60 Visitors	43 Visitors
241 Participants	318 Participants	279 Participants	221 Participants	234 Participants	171 Participants



Transgender / Gender Expansive Community

- Transgender community members travel less frequently because of their younger age, economic and financial discrimination, threat of violence and harassment, and unwelcoming policies by destinations, airlines and hotels. All these concerns can be amplified for international travel.
- 16% indicated a trip to Britain for leisure in the past five years, which is lower than the cisgender men and women in the study.
- Transgender community members were more likely to respond to LGBTQ tourism activities and LGBTQ-specific outreach.

Bisexual Community

- 31% indicated visiting Britain in the past five years for leisure. The percentage is about where we would expect considering gender and age of sample.
- Bisexual participants were less engaged in Britain's LGBTQ scene and media, but equally engaged in visiting LGBTQ neighborhoods.
- Bisexual community members also seem more engaged in experiencing unique, quirky or off the beaten track experiences, and more engaged in outdoor / adventure tourism.

Parents

- Of the parents participating, 67% were female, 25% male, 8% gender-expansive. In the LGBTQ community, there are far more female parents.
- Within the LGBT community, travel with a child to Britain is rare. We identified only 11 LGBT parents that traveled with their child on their last trip to Britain. Child-friendly attractions might not be of interest to most visitors.
- While this research did not test for this hypothesis, it could be that one of the reasons we see a drop off in women over age 35 visiting Britain is because they are more likely to be parents.

Communities of Color

- Generally, the survey found strong international travel experience for both Asian and Latino participants, including travel to Britain. Black participants lagged for international travel.
- However, looking at future interest in travel to Britain, interest was more equal across ethnicity.
- Compared to White participants, Black, Latino, and Asian participants had a clear preference for urban experiences. They also had stronger preferences for LGBTQ attractions and nightlife, which is partially due to their younger age.



Top LGBTQ Motivators to Visit Britain

LGBTQ Market Intelligence Report



Top LGBTQ Motivators to Visit Britain

Historical Attractions Are More Motivating than Anticipated

Sometimes the LGBTQ community is viewed as “trendy” and therefore not interested in historical attractions. Clearly, that is not the case for visitation to Britain. Historical attractions, major tourist attractions, museums and cultural attractions were the top reasons for LGBTQ community members to visit Britain. Don’t be afraid to promote these attractions, but give them an LGBTQ-spin through imagery, programming or LGBTQ-specific historical perspective.

LGBTQ Attractions Are Motivating, but Not the Top Priority

Britain visitors do visit LGBTQ community neighborhoods, nightlife and events once on the ground, but these LGBTQ-specific attractions do not seem to be the top motivation to plan a visit. From our experience, LGBTQ becomes more important in less dynamic destinations. Britain is just too interesting for LGBTQ-specific reasons to rise to be top motivations. Regardless, LGBTQ-specific attractions are important, especially for gay men and younger travelers. Also, participants want to learn more about LGBTQ events that are happening in Britain. VisitBritain needs to walk that fine line; not being “too gay” in outreach, yet being “gay enough” to feel authentic in messaging.

Scenic Beauty is a Key Motivator

Scenic beauty can be anywhere, urban or rural, and it is a key motivator for LGBTQ travel. CMI sees this result for many of our destination research clients. Take care in your imagery to capture the beauty of landscapes, villages, urbanscapes and architecture.

Theatre Can Drive a Repeat Visit

Especially older gay men have an interest in attending theatre. 15% of gay male visitors said that they went to an LGBTQ-themed play or musical while visiting Britain, which is quite high considering the number of these productions. Promoting LGBTQ-themed theatre can be an important motivator for repeat visits. This works for New York City and it should work for London.

Shopping Underperforms

Gay men are often stereotyped as “shoppers” and because of this many destinations think shopping would be a primary travel motivator for the LGBTQ community. In this and every destination research project CMI has ever completed, shopping is near the bottom of travel motivations to choose a destination. Once LGBTQ travelers are on the ground, shopping spend tends to be comparable to the general population.

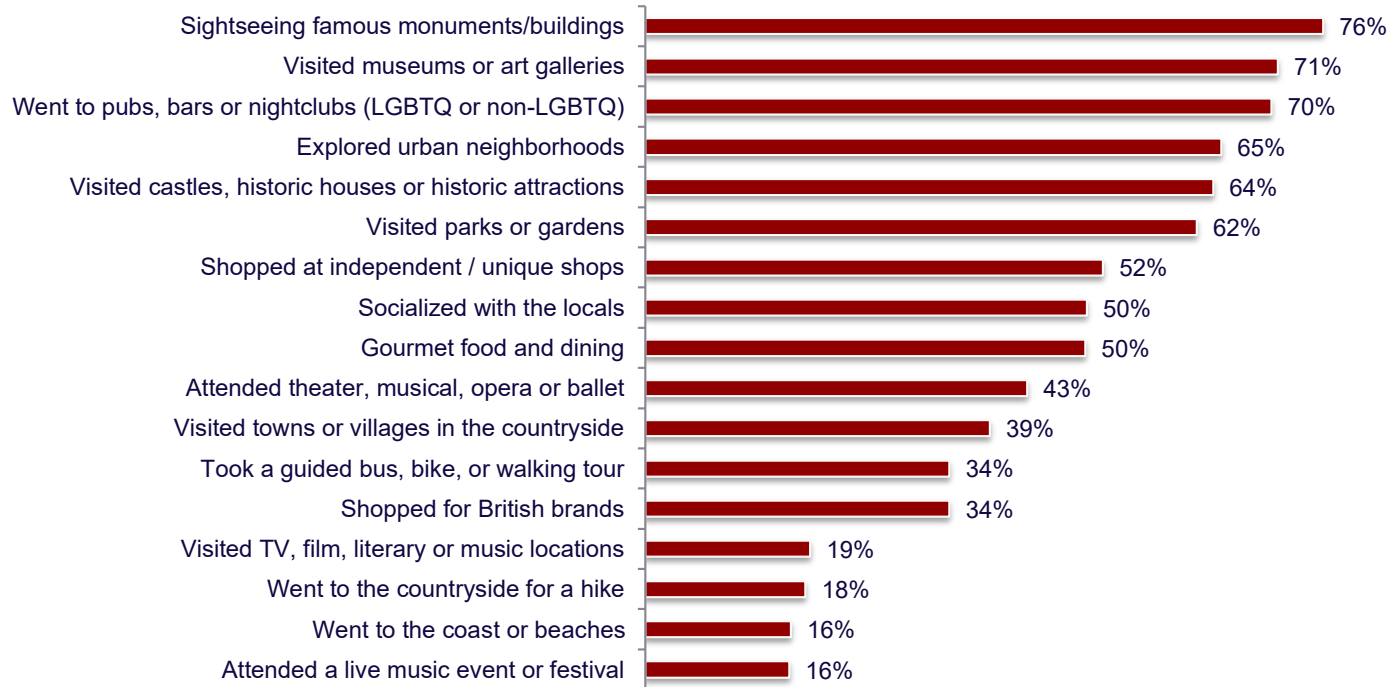
Quirky Attractions Can Attract Millennials

LGBTQ Millennials (perhaps like all young people) are attracted to quirky and different. Promote unique, quirky or off the beaten track experiences in Britain.

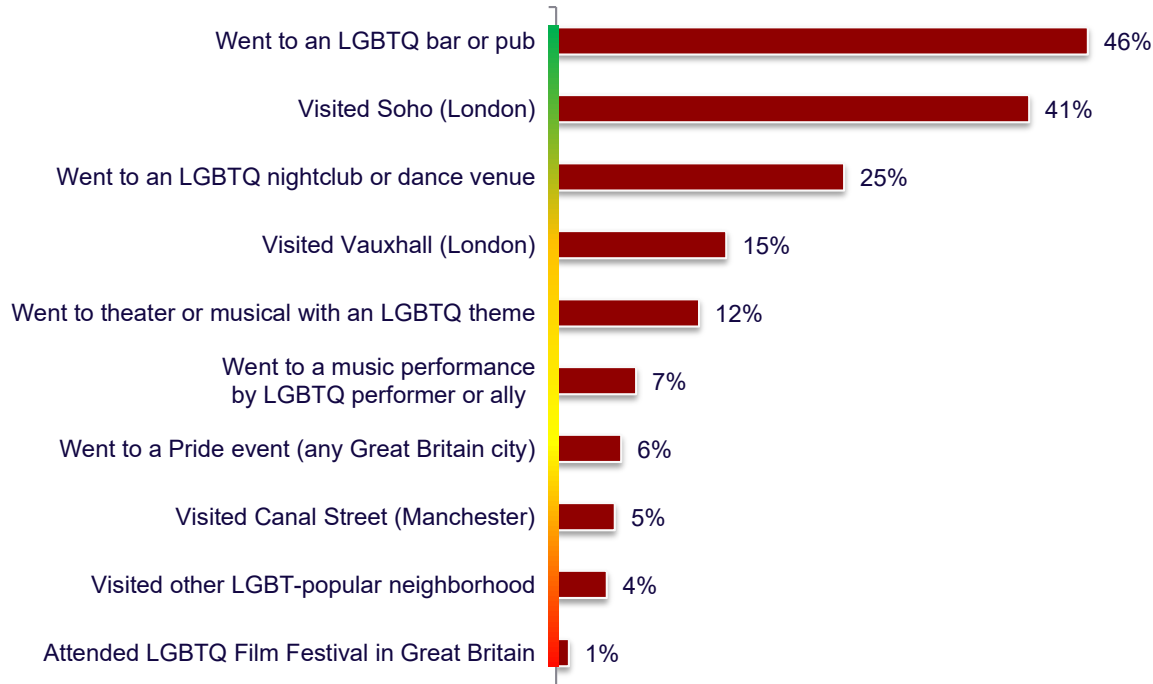
Women and Outdoors Experiences / Men and Urban Experiences

While perhaps stereotypical, and discussed earlier, this point needs to be mentioned in a motivator section. Lesbians are much stronger for outdoor experiences, men are much stronger for urban experiences.

Britain Visitors: What did you do on your most recent visit to Great Britain?



LGBTQ Specific Activities: What did you do on your most recent visit to Great Britain?

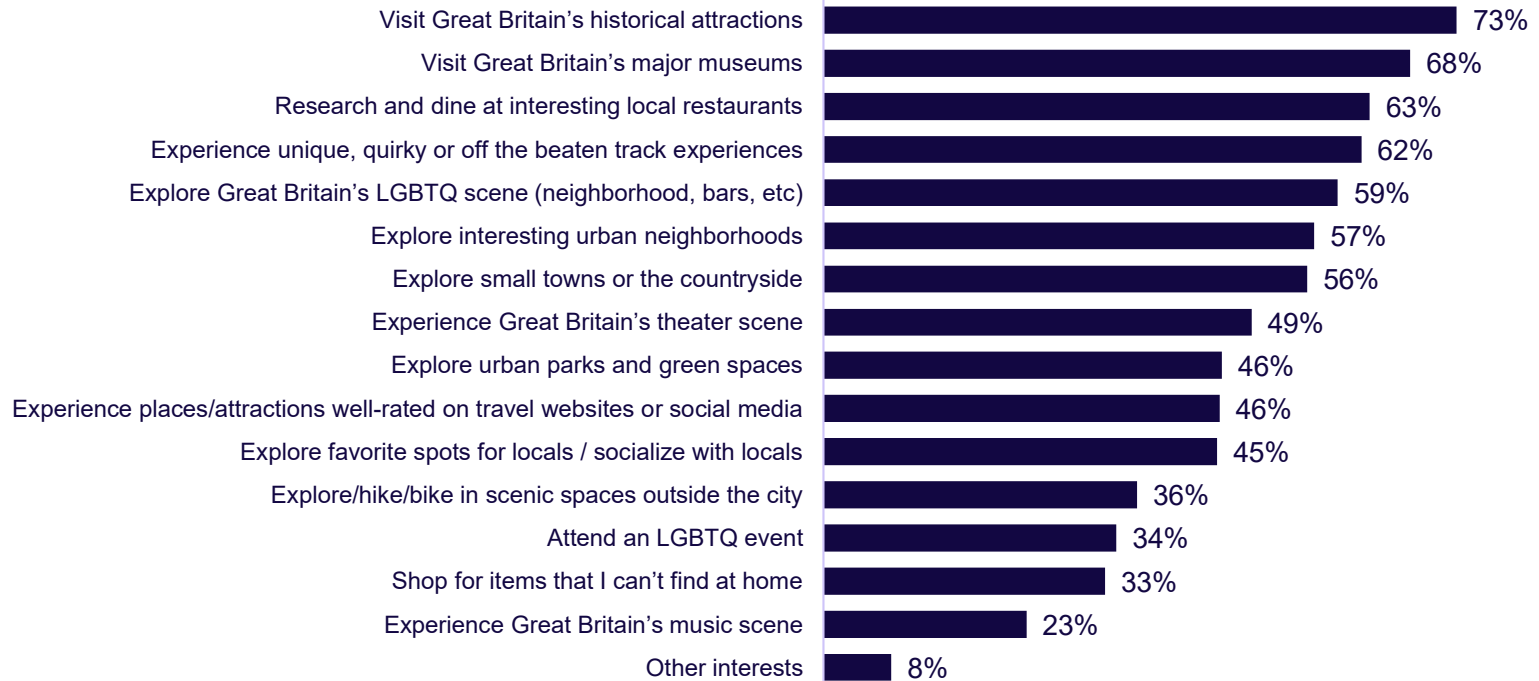


Demographic Notes

60% of **gay and bisexual men** went to an LGBTQ bar or pub compared to 16% of women

48% of **gay and bisexual men** visited Soho compared to 26% of women (includes non-London visitors)

**Which of these activities interest you the most to consider booking your first or a repeat visit to Great Britain?
(Please mark all that apply.) Visitors and Non-Visitors**





**Which of these activities interest you the most to consider booking your first or a repeat visit to Great Britain?
(Please mark all that apply.)**

	Visitors	Non-Visitors	All Male	All Female	All 18-34	All 35-54	All 55+
Visit Britain's historical attractions	70%	75%	73%	74%	71%	74%	75%
Visit Britain's major museums	65%	69%	65%	70%	71%	63%	71%
Explore interesting urban neighborhoods	62%	54%	59%	54%	63%	57%	49%
Research and dine at interesting local restaurants	61%	64%	60%	68%	67%	64%	58%
Unique, quirky or off the beaten track experiences	61%	63%	55%	72%	70%	63%	53%
Experience Britain's theater scene	55%	46%	51%	49%	45%	43%	63%
Explore Britain's LGBTQ scene	55%	62%	64%	52%	68%	62%	47%
Explore small towns or the countryside	52%	58%	47%	67%	55%	52%	62%
Explore urban parks and green spaces	49%	44%	44%	49%	54%	47%	36%
Explore favorite spots for locals / socialize with locals	44%	46%	43%	49%	51%	46%	39%
Experience places and attractions that are well-rated on travel websites or social media	43%	48%	45%	48%	50%	45%	42%
Shop for items that I can't find at home	35%	31%	34%	31%	33%	34%	30%
Explore/hike/bike in scenic spaces outside the city	34%	38%	30%	45%	45%	33%	32%
Attend an LGBTQ event	33%	34%	36%	29%	44%	31%	26%
Experience Britain's music scene	21%	25%	24%	23%	28%	23%	18%



Communicating with the LGBTQ Community

LGBTQ Market Intelligence Report



Communicating with the LGBTQ Community

VisitBritain's LGBTQ Outreach Strategy is Working

77% of visitors to Britain said that they are at least somewhat more motivated to visit a country when they see LGBTQ-specific travel advertising or promotional campaign from a country's tourism office. Of all the European countries tested, participants see LGBTQ outreach messages from Britain more than from other countries. All indicators in the research point to VisitBritain's LGBTQ outreach strategy working, and favorably influencing travel.

The Importance of an LGBTQ-dedicated Campaign and Imagery

The vast majority of participants want VisitBritain to produce a campaign that combines LGBTQ-specific and general imagery/information. Only 13% of visitors support a campaign emphasizing general imagery/information alone.

Britain Visitors and Non-Visitors are Not That Different

While of course there are some differences, considering the overall results, LGBTQ Britain visitors and non-visitors with an interest in international travel are not that different in their motivations. Campaigns that work for one should work for the other.

Media Consumption Data

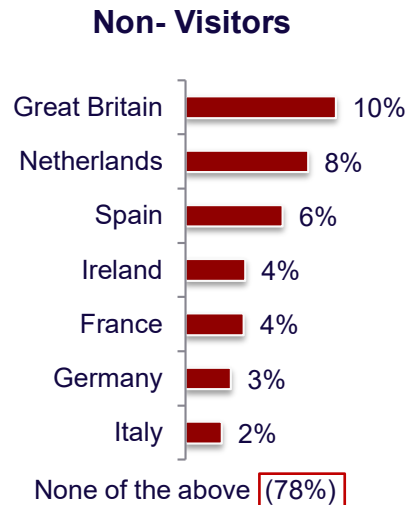
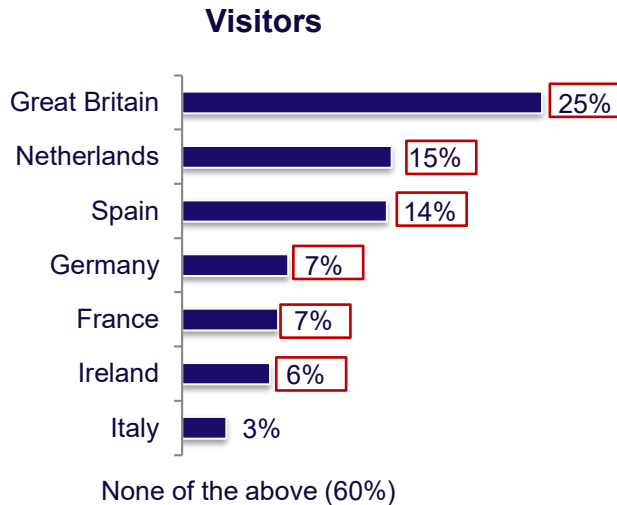
The full report contains detailed media consumption data by gender and generation. LGBTQ community members do not all consume the same media as a group. Age and gender often determines the preferred media.

Recommendations

- Destinations wonder if their “general market” campaign is sufficient for the LGBTQ community. The answer seems to be no. LGBTQ community members expect outreach that authentically engages them as LGBTQ travelers.
- It can be difficult to reach “everyone” in the fragmented LGBTQ media environment. The current strategy seems to be effective yet still missing the majority of the LGBTQ population. VisitBritain must balance an approach of delivering important repeat impressions to the most likely travelers, as well as branching out to attempt to influence LGBTQ travelers that are not being currently impacted.
- The research points to public relations being more important than advertising to motivate LGBTQ travel. Promoting attractions as well as pro-LGBTQ laws can encourage travel in ways that are unique to the LGBTQ community. Work with media to include an editorial/public relations content that goes beyond advertising.

Outreach Recognition: This question was asked before the participants knew the survey was about Great Britain. Compared to the competitive set of countries, Britain is doing the best job in reaching the LGBTQ community.

In the past three years, have you seen any of these European travel destinations reach out to you specifically as an LGBTQ traveler, through advertising in the LGBTQ media, LGBTQ social media or through sponsorship of an LGBTQ event?



Indicated Great Britain	
All Male	21%
Male Visitors	31%
All Female	8%
Female Visitors	14%
All 18-34	12%
All 35-54	16%
All 55+	18%
All White	14%
All Non-White	17%

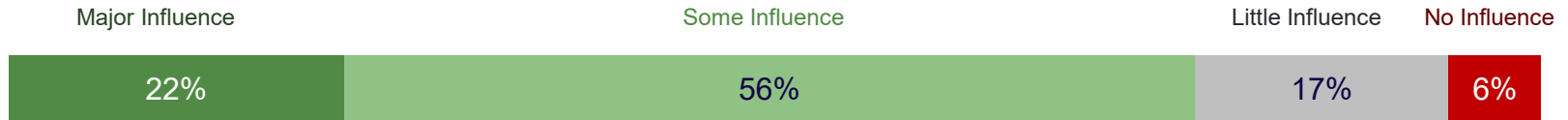
Level of LGBTQ in Outreach: The vast majority of participants want VisitBritain to produce a campaign that combines LGBTQ-specific and general imagery/information. Only 13% of visitors support a campaign emphasizing just general imagery/information.

When you think about advertisements promoting a travel destination, which approach feels more motivating for you, as an LGBTQ traveler?

	Visitors	Non-Visitors	Male	Female	18-34	35-54	55+
A campaign emphasizing LGBTQ-specific imagery/information	15%	13%	14%	12%	16%	15%	9%
A campaign that combines LGBTQ-specific and general imagery/information	72%	75%	71%	77%	76%	73%	72%
A campaign emphasizing general imagery/information	13%	12%	15%	11%	7%	12%	19%

When you see an LGBTQ-specific travel advertising or promotional campaign from a country's tourism office, how much do you think it influences you to consider that country for a future visit?

Among All USA Participants

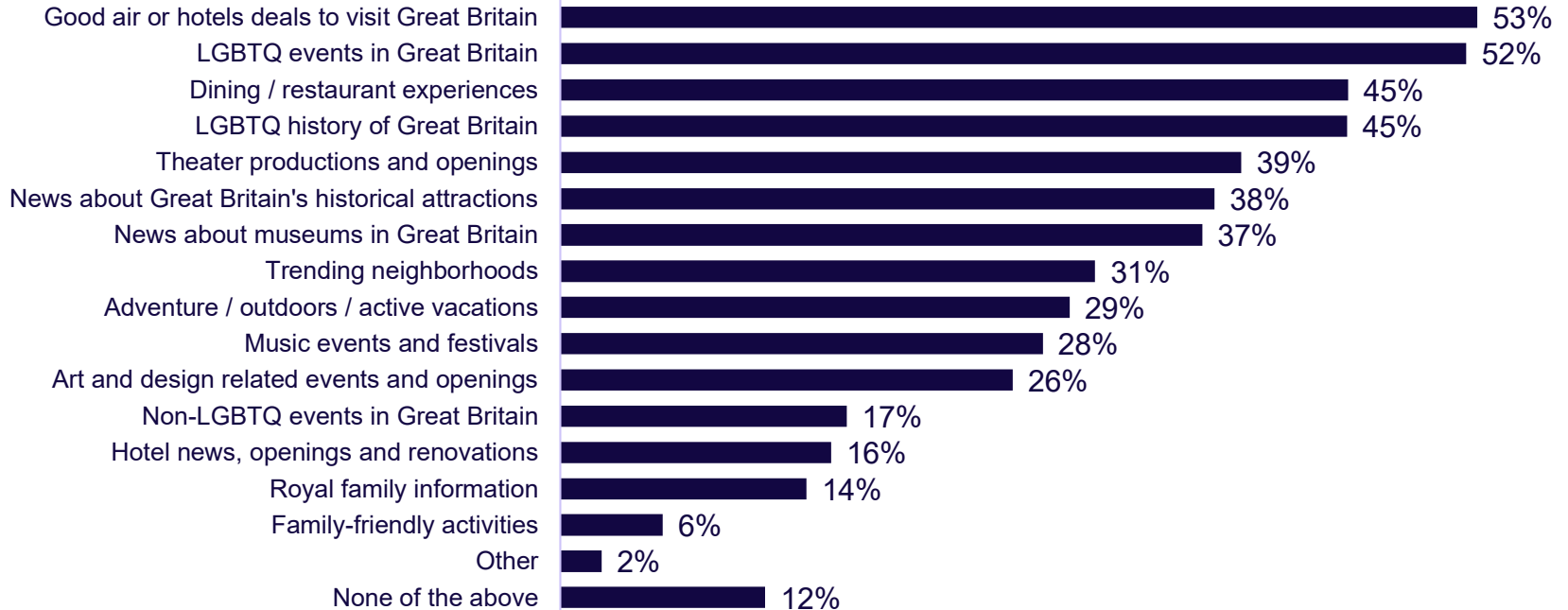


When you see a country pass pro-LGBTQ legislation, such as marriage equality or LGBTQ non-discrimination laws, how much do you think it influences you to visit that country some day?



What types of information would you want to learn more about from Great Britain? (Please mark all that apply.)

Among All USA Participants





 Canadian
LGBTQ Leisure
Travel to Britain

LGBTQ Market Intelligence Report



Canadian LGBTQ Community

Canadian vs. USA Visitors

Canadian and United States study participants did not seem very different in their motivations. However, the report did note some differences.

- Compared to USA visitors, Canadian visitors were less focused on London (-10%) and more focused on Scotland (+8%). Also, Canadian visitors seemed more motivated by beaches, coastal towns and the countryside than United States visitors.
- Canadians spent longer periods of time in Britain than USA participants. However, this may be driven by Canadians being more likely to stay with friends and family.
- Canadian participants were 8% less likely to say Britain was very LGBTQ-friendly and 7% less likely to say Britain was very safe. However, this is evaluating Britain to Canadian standards.
- Canadians were more likely to mention expense as a reason not to visit (61% vs. 50%) and they seemed especially concerned about air expense.

Canadians Less Likely to See Britain Outreach

Compared to USA visitors, Canadian visitors were 9% less likely to have seen Britain LGBTQ specific outreach.

Media Viewed by Canadians

Canadians are less likely to view most of the LGBTQ media listed, which is not surprising because so many of the media were United States based. What was more surprising was the reasonable level of Canadian LGBTQ pick-up that existed for these LGBTQ media properties.

The two Canadian-based LGBTQ media had better pick-up, especially DailyXtra and Quebec-based Fugues.

British-based PinkNews was viewed by 22% of Canadians, and that was better than most of the United States media listed.

Recommendations

- In general, campaign messages that are developed for the U.S. market should be relevant to most Canadians.
- LGBTQ Canadians are sensitive to marketing approaches that can make them feel “secondary” to the USA market, especially since Canadians are so far more advanced in LGBTQ equality. Create Canadian campaigns that acknowledge their sensibilities and speak directly to the Canadian LGBT community.
- Results indicate the LGBTQ Canadians are less likely to see VisitBritain outreach and more resources may need to be invested in Canada.

Five Year Visitation Percentage by Segment: The chart demonstrates that Canadian men are somewhat more likely to visit than Canadian women by percentage, but the gap is not nearly as wide as in the USA. CMI noticed this trend in the Annual LGBTQ Travel & Hospitality Survey too. Visitation by age group was relatively stable.

Percentage Breakdown by Segment (Visitors and Non-visitors included)

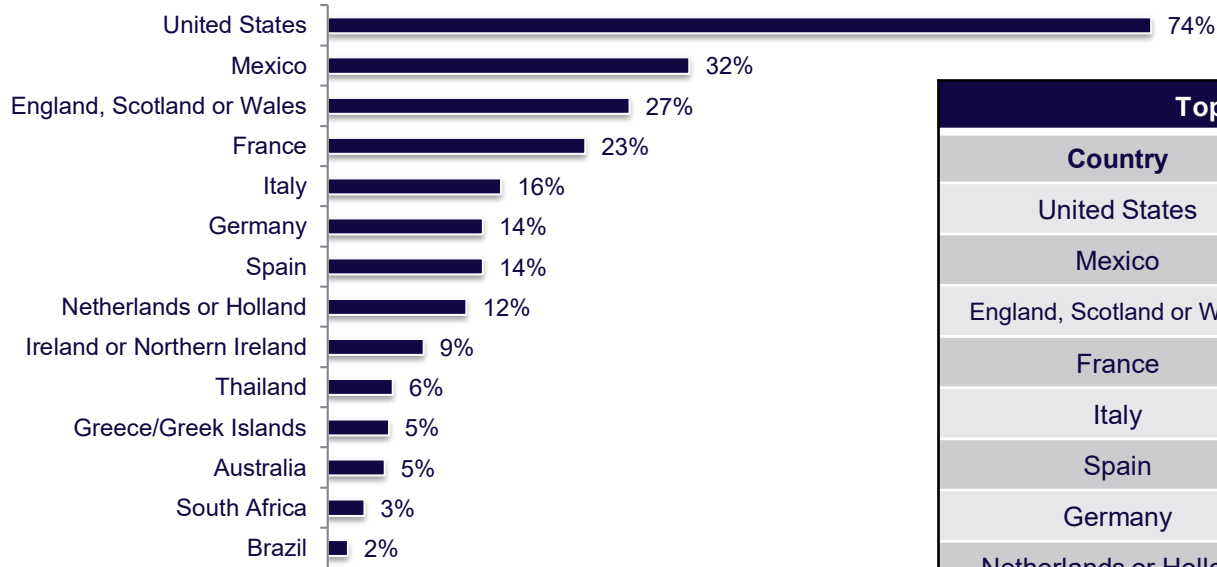
Visited Britain in Past Five Years for Leisure Travel

35%	30%	29%	32%	33%	32%	33%
Gay and Bi Men	Lesbian and Bi Women	*18 to 34	35 to 54	55+	White	Non-White
111 of 316	61 of 205	51 of 173	73 of 226	49 of 148	138 of 437	35 of 105

Gender Expansive
n=1 of 26 (Small Base)

Where Else LGBTQ Canadians Go: With so much of the Canadian population living close to the border, most Canadian participants traveled to the United States in the past three years. In contrast, only 33% of U.S. participants traveled to Canada. Interest in Mexico and France was very similar to US participants.

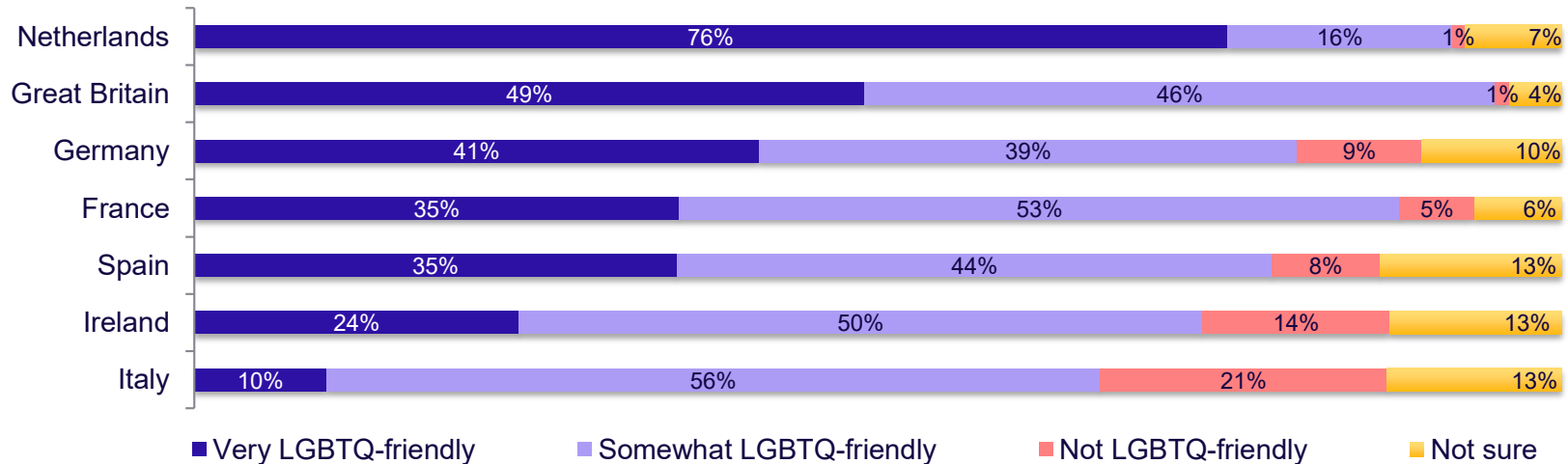
Have you visited any of these travel destinations in the past three years, for vacation or leisure travel?



Top Destinations		
Country	Men	Women
United States	76%	71%
Mexico	37%	27%
England, Scotland or Wales	29%	27%
France	26%	20%
Italy	20%	9%
Spain	19%	8%
Germany	16%	10%
Netherlands or Holland	14%	11%

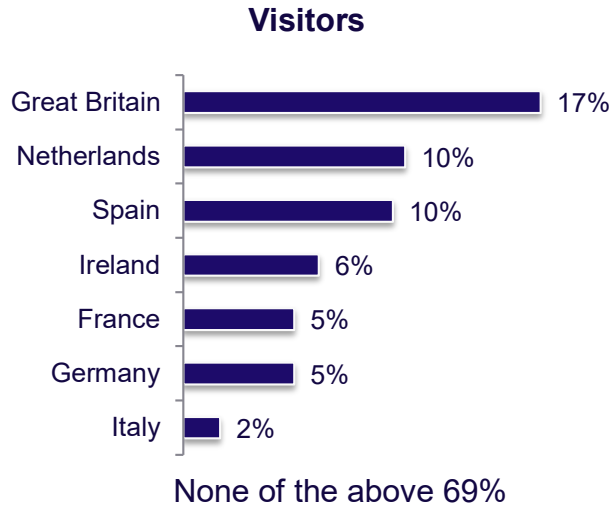
LGBTQ-Welcoming Rating: The vast majority of Canadian participants consider Britain to be LGBTQ-welcoming. However, the overall ranking was well behind the Netherlands. Of interest, Canadians were 8% less likely to say Britain was very LGBTQ-friendly compared to United States participants, but that is comparing Britain to Canadian standards.

When you think about these European travel destinations, which do you consider an LGBTQ-welcoming place for travel?



Outreach Recognition: Canadian visitors to Britain were far more likely to remember LGBTQ-specific outreach than non-visitors. These percentages are below United States percentages for recognition.

In the past three years, have you seen any of these European travel destinations reach out to you specifically as an LGBTQ traveler, through advertising in the LGBTQ media, LGBTQ social media or through sponsorship of an LGBTQ event?



Britain Visitors: While the percentage visiting for vacation travel was high, a significant number of Canadians also indicated that visiting friends and family was also important. This is one of the reasons there was a drop in hotel stays for Canadians compared to United States residents.

**Thinking about your last trip to Great Britain, what was the main reason for your visit?
(Choose multiple reasons if they are equally important.)**

Visitor Segments	Britain Leisure Visitors in Past 5 Years					
	All LGBTQ	Male	Female	18-35	35-54	55+
Vacation travel	84%	85%	82%	82%	89%	78%
Visit family	24%	18%	36%	22%	27%	22%
Visit LGBTQ friends	20%	20%	18%	25%	16%	18%
Visit straight friends	17%	14%	25%	22%	22%	6%
Business travel	8%	9%	7%	12%	5%	8%
Education or academic	3%	3%	5%	8%	1%	2%
Attend an LGBTQ event	2%	3%	2%	4%	1%	2%
Other	4%	5%	3%	4%	1%	8%
Base	173	111	61	51	73	49

THANK YOU



For more information:

David Paisley, Senior Research Director



584 Castro St. #834 • San Francisco, CA 94114

Tel +1 415/437-3800 • Fax +1 415/552-5104

david@CommunityMarketingInc.com



Paul Gauger – Deputy Director, The Americas
Paul.gauger@visitbritain.org

Anna Harris – Market Intelligence Consultant
Anna.harris@visitbritain.org