



IGLTA
FOUNDATION



NYU

Current Trends in LGBTQ+ Travel

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Introduction

The LGBTQ+ market segment is becoming one of the largest targeted marketing segments among tour operators and hotels. There has been a significant increase of products and services targeting the LGBTQ+ market segment. Because of this, LGBTQ+ Travel over the years has shifted drastically. Now, there is an evolving world of gay travel. Today, there are many tours that span the globe and target LGBTQ+ couples and families. Major hotel players such as Marriott and Hilton have dedicated microsites and destination packages([nytimes.com](https://www.nytimes.com)).

In an article entitled “How LGBT Customers Became the Most Undervalued Economy in the World”, it states that in 2016, the U.S. Treasury Department revealed that same-sex (male) couples have an average income of \$176,000, roughly \$63,000 more than opposite -sex couples ([medium.com](https://www.medium.com)). In 2016, lesbian couples earned \$11,000 more than the opposite-sex couple. It is evident to say that gay and lesbian couples have more disposable income. This makes them more susceptible to travel. Not only are these couples traveling as a couple, there has been an increase in LGBTQ+ family travel. Even though there have been many companies that are targeting the LGBTQ+ market for many decades, for this project, our team collaborated with the IGLTA Foundation to better understand “who is the LGBTQ+ traveler?”, “what is it that they are looking for in a travel destination?”, and “how can the members of IGLTA better serve this market segment and capture this demand?”. The International Gay and Lesbian Travel Association was founded in 1983. It is considered the world’s leading network of LGBTQ+ travel. IGLTA provides free travel resources as well as information while constantly working to improve safety within the LGBTQ+ community([iglta.org](https://www.iglta.org)). According to IGLTA’s website, “IGLTA members include LGBTQ+- friendly accommodations, transport, destinations, service providers, Travel Advisors, tour operators, events and travel media located in over 75 countries” ([iglta.org](https://www.iglta.org)).

The purpose of this paper is to identify the current demographics and trends in the LGBTQ+ Market. LGBTQ+ travelers have become a very important aspect of the hospitality industry. The “Pink Dollar” that is associated with LGBTQ+ travelers has added billions of dollars to the U.S. economy. However, this market is still being discovered, and has a lot of untouched potential. Due to the newness of identifying who the LGBTQ+ traveler is, research is limited. The purpose of this research is to help the members of IGLTA provide a better marketing landscape and create new travel itineraries for the LGBTQ+ customer. Taking this into account this research is designed to answer the following questions:

- What tourism products and/or services as well as travel destinations are appealing to the LGBTQ+ communities?
- What are the current trends in LGBTQ+ travel?

The following literature review includes four major aspects: a clear definition of LGBTQ+ tourism, travel changes as it has impacted and changed LGBTQ+ travel, LGBTQ+ traveler demographics as well as traveler motivations. In addition, it will include the “research design” used to collect data, “key findings”, “managerial implications” and “limitations and opportunities for future research”.

Literature Review

LGBTQ+ Tourism & Travel Changes

LGBTQ+ tourism is the type of niche tourism targeted at the lesbian, gay, bisexual, transgender and queer communities (Greenberg 2007). With the growth of LGBTQ+ group, many destinations start to market and develop product or service to them. Destinations or tourism suppliers design the specific service for LGBTQ+ travelers with the welcoming and respectful attitudes.

Over the years, LGBTQ+ travel has changed significantly. There have been many historical moments that has helped shape LGBTQ+ travel into what it is today. According to an article by Gabriella Chaudhri entitled “Six ways the gay scene has changed over the decades”, help explore six monumental ways LGBTQ+ travel has changed. In the 1960’s the first tourism guide book Damron Men’s Travel Guide gave gay men the option to book holidays via a gay tourism infrastructure (Chaudhri 2017). This help launch the onward point of gay travel in gay newspapers and magazines. In the 1970’s HE Travel ran the first adventure tour in 1973 (Chaudhri 2017). This tour that took men rafting in the Grand Canyon market the beginning of gay travel companies. However, in 1989 Denmark became the first nation in the world to recognize registered same-sex partnerships (Chaudhri 2017). In 1985, RSVP Vacations became the originator in the gay and lesbian cruise concept. By the early 2000’s the gay and lesbian honeymoon expanded bigtime and is now a major player in LGBTQ+ travel. One of most important of them all are Pride parades. The first Pride march took place in Washington Square Park in the 1970’s. Now Pride Parades happen in many different places.

Travel trends in other countries have changed over the years as well. In an article published by NBC News in 2016, it listed the top 15 best countries for LGBTQ+ Expats. According to

this article, Argentina legalized same-sex marriage in 2010. This became the first country in Latin America to do so. In 2003 Belgium become the second country to legalize same-sex marriage. It was also ranked #4 on Gallup's 2015 list of "Top Places for Gay People to Live" (Brooke Sopelsa, Noel Gutierrez Morfin). Canada legalized same-sex marriage in 2005. Denmark was one of the first to recognize same -sex partnerships in 1989. However, in 2012 it legalized it (nbcnews.com). France legalized same sex marriage in 2013 and was the first to de-list transgender identifications as a mental illness (nbcnews.com). In 2015 Ireland legalized same-sex marriage by popular vote. Luxemburg legalized same-sex marriage in 2014. New Zealand in 2013 became the first to legalize same-sex marriage and same-sex adoption (nbcnews.com).

In an article published by Georgia Voice, the premier media source for LGBTQ+ Georgia, a five-judge panel on the Caribbean Court of Justice on Tuesday November 13, 2018 struck down a Guyana law that once criminalized cross-dressing. This law took effect in Guyana during the colonial -era in 1893 when Guyana was a British colony. However, prior to this victory several events took place. In 2009 four trans women were arrested for violation of Guyana's cross-dressing law. They each paid a fine of \$7,500 Guyana dollars which equaled (\$35.97) in us currency. The Society Against Sexual Orientation Discrimination and the four trans women filed a lawsuit the challenged the constitution. However, the Guyana High Court and the Court of Appeal ruled against the trans women and the Society Against Sexual Orientation. This did not stop them. They then brought the case to the Caribbean Court of Justice. Now there is no longer a law against trans individuals.

The Netherlands is considered the most gay-friendly country in the world and it legalized same sex marriage in 2000 (nbcnews.com) Norway legalized same-sex marriage in 2009 and pride in Oslo is one of Norway's largest events (nbcnews.com). In 2006 South Africa became the first

country in Africa to legalize same-sex marriage. Spain also is very welcoming of Same-Sex marriage and legalized it back in 2005. Sweden legalized same-sex marriage in 2009 while LGBTQ+ discrimination has been banned since the 1980's. Uruguay is one of South Africa's most LGBTQ+ friendly countries. In 2009 it allowed trans peoples to change their official documents to match their gender identity (nbcnews.com).

There are many countries around the world that still do not allow same-sex marriage. However, there are some countries that have lifted their ban on same-sex marriage and makes it easier for the LGBTQ+ community to visit. According to an article on worldnomads.com entitled "Safety Tips for LGBT Travelers in India", India decriminalized homosexuality in 2018 after being a criminal offense since 2013 (worldnomads.com). A handful of tour operators who lead trips there indicate that India is hospitable and welcoming to LGBTQ+ travelers (worldnomads.com).

LGBTQ+ Demographics

LGBTQ+ customers have been commonly considered as a profitable market segment (Pritchard & Morgan, 1997; Russell, 2011; Stuber 2002). The researchers defined the LGBTQ+ travel segment (focused on Gay men) as well-educated individuals with relatively higher discretionary incomes, fewer children and more leisure time than the non-LGBTQ+ customers. They tend to travel more frequently (Community Marketing, 2008; Hughes, 2006) and spend more money while traveling (Guaracino, 2007) and are more loyal to the brands (Pritchard & Morgan, 1996). The survey by General Social Survey (GSS) and National Health Interview Survey (NHIS) showed that LGBTQ+ individuals were more likely to have college or graduate degree in comparison to their heterosexual counterparts. In both surveys, more than 4 in 10 LGBTQ+ individuals who aged 25 or older had a college or graduate degree. While only 3 in 10 of non-

LGBTQ+ individuals in same age group had a college or graduate degree (Gates, 2014). In addition, LGBTQ+ people typically had a higher travel spending than the average. Community Marketing Incorporated estimated that LGBTQ+ groups spent about US\$ 100 billion a year in North America alone in 2014 (Oskaras & Anne, 2015). And this type of crowd spent about \$1,300 on average on travel while the average planned travel expenditure was \$1,058 during the same period in 2011 (Community Marketing Incorporated, 2012). Meanwhile, based on the findings from survey, 29% of LGBTQ+ consumers took five or more trips than heterosexual (Community Marketing Incorporated, 2014). The Institution also found that LGBTQ+ had the largest amount of disposable income and made up five percent or more of the USA consumer market (Community Marketing Incorporated, 2014). Meanwhile, the research of Carpenter mentioned that homosexual men had more disposable income due to their stronger attitudes of being DINKs (double income, no kids) comparing with non-LGBTQ+ (Carpenter, 2004).

LGBTQ+ is an exceptional diverse community. Some individuals willingly identify himself/herself as lesbian, gay, bisexual, transgender or queer while others may not. Based on market research, it assumes that between 3%-7% of population are willing to be identified as LGBTQ+. Nevertheless, LGBTQ+ cannot be treated as a homogenous group because each segment has its own characteristics. The family structure will influence the income disposal, travel budget, destination and product choice. Lesbian couples are more likely to adopt children than gay men. Bisexual community is comprised by both opposite-sex and same-sex couples. Meanwhile, bisexual individuals are more difficult to be identified by public since their self-cognition is either gay or straight. And with the increasing visibilities and attitude change, communities of transgender and queer raise market awareness and attract attention in recent years (Second Global Report on LGBT Tourism, 2017).

Travel Motivations of LGBTQ+ Segment

A certain number of existing academic research identified the motivations of the LGBTQ+ market segment (Pitcard et al., 2000; Hughes, 2005; Monterrubio, 2009; Vorobjovas-Pinta & Hardy, 2015; Christy et al., 2018). There was always a debate for comparing the LGBTQ+ travelers' motivations or travel preferences with the heterosexual travelers.

Some previous studies suggested that LGBTQ+ market segment maintained some distinguished needs and wants, such as sophisticated tastes, the need for gay space and LGBTQ+- specific events (Hughes, 2002; Hughes, 2005; Monterrubio, 2009; Vorobjovas-Pinta & Hardy, 2015). These iconic LGBTQ+ motivations could be categorized into three aspects: comfort and relaxation, social life and sex, culture and sights (Oskaras & Anne, 2015). The results of Clift and Forrest's research (1999) showed that more than 50% participants expressed that comfort, good food, opportunities for rest or relaxation and guaranteed sunshine were very important while selecting the LGBTQ+ tourism products or services. More than 30% participants selected "the opportunities to socialize with LGBTQ+ group", "LGBTQ+ culture and venues", "beautiful landscapes" and "the opportunities to experience the local culture" as important attributes for their purchase decisions. It was particularly interesting that 29.3% participants considered "the opportunities to have sex" as the most important determinants while selecting the LGBTQ+ tourism products or services. In addition, CMI reports showed that homosexual tourists prefer to travel to destinations where they feel safe and do not have discrimination against them (Puar, 2002). A recent qualitative analysis of interviews with a group of Asian gay men conducted by Wong and D. Tolkach (2017) demonstrated that the travel decisions were influenced by multiple attributes, including centrality of being gay to self-identify, degree of disclosure of personal sexuality to

others, level of disposable income, safety and conservativeness of destinations (Wong & D. Tolkach, 2017).

On the other hand, there were some data-driven research results showing that the LGBTQ+ had the similar travel motivations as the non-LGBTQ+ consumers, such like relaxation, escape and social networking (Pritchard et al., 2000; Vorobjovas-Pinta & Hardy, 2015; Wong & D. Tolkach, 2017). Specific to the hospitality product or service, a recent survey undertaken by Christy et al. (2018) was to determine these priorities for individuals of the LGBTQ+ segment when selecting lodging for leisure trips. Their results showed that the top five hotel priorities for LGBTQ+ travelers were not LGBTQ+ specific, followed as location, price, hotel general safety, rewards programs and fitness space, which were equivalent of those non-LGBTQ+ customer's perceptions of value drivers and expectations (Christy et al., 2018).

Emerging Travel Types

Cruises are the significant branch of LGBTQ+ tourism. LGBTQ+ cruises enjoy large customer groups. The Community Marketing Incorporated (CMI) conducted three-times researches with the sample size of more than 3,000 LGBTQ+ people for each from 2015 to 2017 in US market. The result showed that there have been about 15% of LGBTQ+ people taken at least one cruise trip in the past 12 months since 2015 (CMI 2015, CMI 2016, CMI 2017). Canadian is also considered as the main and popular marketplace for cruises. Based on a survey with sample size of more than 2000 LGBTQ+ Canadians, around 15% of LGBTQ+ Canadians have taken at least one cruise trip in the past three years (CMI 2018).

There are some reasons leading cruise lines become popular products among LGBTQ+ travelers. Based on the Weeden et al.'s research (2016), LGBTQ+ travelers have more opportunities to see local culture, to explore new places, to take a rest and relax themselves, to travel with friends and loved ones, to see dramatic or beautiful landscapes, and to enjoy quality eating experiences in cruises travel. With the increase of the regions where homosexuality is decriminalized or legal, and the huge business opportunities LGBTQ+ tourism bringing (UNWTO 2012; ETC 2018), there are gradually more and more destinations open to LGBTQ+ cruises. While with the purpose of avoiding hostility and protests, LGBTQ+ cruise lines currently still focus on the “greatest hits” gay- friendly ports, which mainly in the Caribbean region and Europe (Cruisecritic 2018). Meanwhile, the number of LGBTQ+ cruise operators are growing as well. Operators now include a range of North American and European LGBTQ+ tour operators, such as Atlantis Events, Olivia, RSVP and R Family. Cruise lines supply the ship and its staff, while the LGBTQ+ operators arrange itineraries and provide entertainment items (Weeden et al, 2016).

The types of LGBTQ+ cruises mainly include two types. The first is mainstream cruise lines which are friendly to LGBTQ+ groups such as Celebrity, Royal Caribbean and Disney. These cruises operators usually provide the cruise products not only to LGBTQ+ groups but heterosexuality travelers. The second type is chartered cruises only for specific gay, lesbian and transgender groups. The examples of operators are Atlantis and Olivia (cruisecritic 2018; ETC 2018). Cruise options also range from mega ships to small and intimate sailboats, taking travelers to ocean, sea or river (IGLTA). Since different operators focus on different parts of LGBTQ+ markets, they service with different cruise products. The world's largest gay tour operator, Atlantis Events, mainly focuses on gay cruises (American Discount Cruises 2018). In contrast, lesbian tour

operator Olivia concentrates on lesbian cruises. Additionally, RSVP and R Family market to those customers who traveling with children or with extended family.

Since the United States joined the list in 2015, wedding and honeymoons became the most buzzed-about topic within discussions of the LGBT travel market. According to a recent report from the Williams Institute, same-sex weddings have generated an estimated \$1.58 billion boost to the United States' economy since the U.S. Supreme Court decides to extend marriage equality nationwide last year (PATA 2016). For the global wedding industry, it approximately is worth over USD 300 billion worldwide, and USD 55 billion in the United States of America alone (UNWTO 2017). There will be an increasing number of couples purchasing jewelry, venue, catering, photography, flowers, entertainments, clothing, gifts, accommodations, honeymoons and much else. In addition, the cost of honeymoons is also included travel expenses related to families and friends who will attend the ceremony.

People always treat honeymoon as the perfect opportunity to celebrate a new partnership with a big-spend-once-in-a-lifetime trip. This kind of commons, in particular help Hawaii, same as other beach destinations worldwide, and uber destination in North America and Europe becoming the fashionable destinations (UNWTO 2017, ETC 2018). According to a 2016 report by Community Marketing Inc, 80% of same-sex couples in US declared that they expected to take a major vacation in the 12 months after their wedding ceremony (CMI, 2016). The idea of celebrating throughout the journey is something consider by all travel providers like airlines, transportations, hotels, and tours. They can provide a uniquely tailored service to newly-wed same-sex couples.

Research Design and Methodology

Purpose Statement

The International Gay and Lesbian Travel Association (IGLTA) is a valuable resource for the LGBTQ+ travelers to find businesses and destinations that welcome gays and lesbians into the world of travel. They created a global LGBTQ+-friendly tourism networking community, including major corporations, localized organizations and businesses. IGLTA's membership is open to any individual, association, corporation or partnership directly or indirectly involved with the LGBTQ+ travel industry, such as airlines, car rentals, publishing firms, attractions, booking services, concierge services, cruise lines, convention and visitor bureaus or tourism offices, gambling houses or casinos, ground transportations, meeting planners, associations, insurance agents, internet services and marketing companies. This research focuses on the audience, which consists of more than 200 multi-national IGLTA buyer members. Specifically, the survey participators are third party buyers like travel agents and tour operators.

This research aims to provide insights with regards to the gaps found in the current literature. Listed below is the main purpose of this research, including two parts:

- 1) To investigate tourism products, services and travel destinations appealing to the LGBTQ+ communities;
- 2) To identify the current trends in LGBTQ+ travel.

Also, the research team is committed to help the members of the IGLTA provide a better marketing landscape, and to create new travel itineraries for the LGBTQ+ customers.

Method and Technique

This research adopts the online survey as the research method for data collection because it is fast and convenient, allowing the survey audience in the distance to participate in the research

without hindrance. The goal of the third-party-buyer-facing surveys was to answer the original research questions and provide insights to the industry.

The research tool for this research is Qualtrics which is multifunctional, including recording, publishing and distributing the questionnaire, collecting data, doing some types of analyses and making reports. The preliminary report for the survey was auto-generated in Qualtrics every time a respondent finishes the survey. The questionnaire was designed to take approximately 15 minutes to complete.

The questionnaire is structured in three sections. The questions in the first section (Q1-Q8) refers to the demographic information of these participators, such as business types, numbers of employees and the amount of revenue represented by LGBTQ+ sales. The second (Q9-Q12) contained questions about which LGBTQ+ related tourism products and services are being offered by the IGLTA buyer members, as well as their perceived destinations that have been successful and to be successful with the LGBTQ+ market segments. The goal of the first two questions (Q13, Q14) in the final section is to gather information about which attributes can drive the sales volume of these LGBTQ+ tourism products or services as well as the popularity of the destinations, and the rest four questions (Q14b, Q15, Q16, Q17) in this section are open-ended questions created based on the Community Marketing Incorporated survey and report in 2017, and European Travel Commission survey and report in 2018, aiming to identify some other aspects in current LGBTQ+ travel which have not been investigated through former questions in the questionnaire, such as “the plans for LGBTQ+ family travel market”, “most common complaints from LGBTQ+ customers”, “marketing strategies for LGBTQ+ tourism products and services”, and “emerging trends shaping demand in the LGBTQ+ travel segment from a company perspective”. The research team process both the qualitative and quantitative data received.

Sampling Information

The sampling method for this research is non-probability target sampling. There are two steps in the process of sample selection. In the first step, the third-party buyers among the IGLTA members were identified through the IGLTA's member database. The third-party buyers mainly include travel advisors or agencies, tour operators and meeting or event planners. In the second step, at the beginning of the survey questionnaire, the questionnaire reader has to decide upon ("Agree" or "Disagree") the answer to question "I have read and understood the information provided above, and I agree to participate in this survey". If the reader chooses "Disagree", the survey ends, and response will be regarded invalid. Moreover, based on the system record information like IP addresses, each selected IGLTA member can only complete the questionnaire once. By April 26, 2019, there had been 96 valid responses.

Pilot Study

In order to increase the validity of this research, an online semi-structured interview was conducted with the CEO of the IGLTA, John Tanzella, and a vice president of the IGLTA, LoAnn Halden. A series of modifications were made, including: 1) added an invitation letter to the beginning of the questionnaire; 2) deleted the original Question 1 "Please indicate what company or organization you work for" to preserve the anonymity of the survey audience; 3) corrected the explanation to the concept "Gender Expansive" in Question 7 to "Individuals who consider themselves Transgender, Non-Binary, Genderqueer and/or Gender Fluid"; 4) corrected some statements, for example: Question 9: edited from "Based on the sales performance or volume in the past 12 months, what are your top three LGBTQ+ tourism products and/or services?" to "Based on sales performance or volume over the past 12 months, what are your top three LGBTQ+ tourism products and/or services?" 5) updated several questions, for example: Question 12: updated to

“Please list the top five destinations for your LGBTQ+ clients in the past 12 months, either for leisure or business travel. (Can be cities or countries).”

Distribution

The distribution approach adopted in this research was through online non-probability targeting samples. The distribution channel for the survey is that emails were sent out to the third-party members by IGLTA through its portal, with an invitation letter and the hyperlink to the survey.

Reliability and Validity

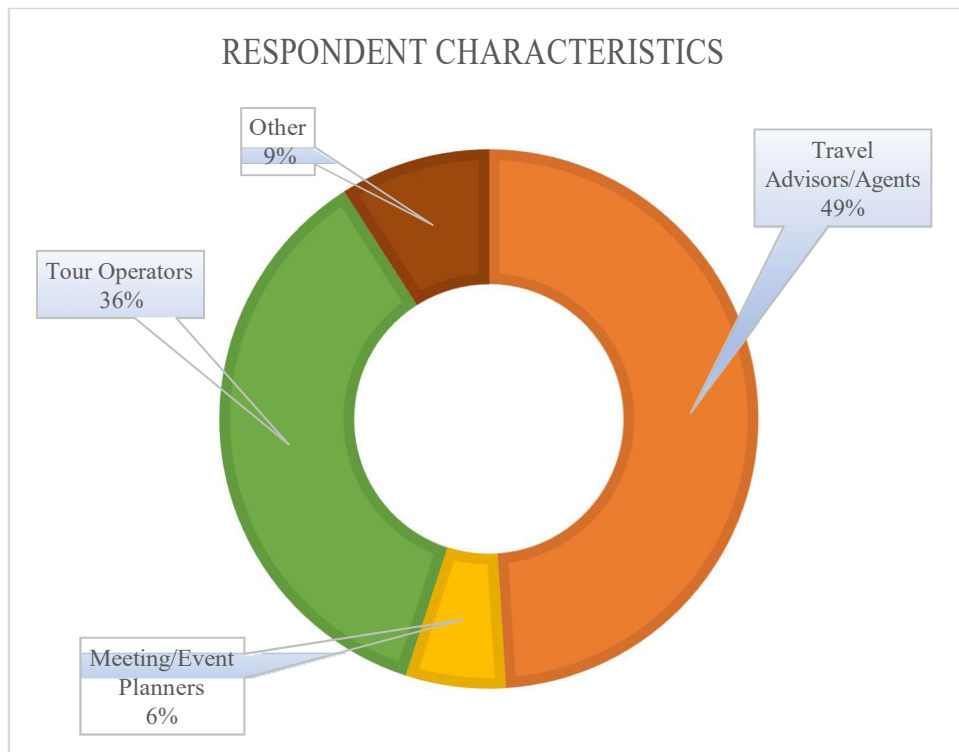
To design the survey questionnaire, researchers consulted several strict and successful surveys to ensure its reliability including Communication Marketing Incorporated (CMI) survey in 2017, European Travel Commission (ETC) survey in 2018, and Temple University’s survey in 2018. Also, the adapted version was reviewed and tested to ensure that all the questions made sense and the original objects would be attained. To further explain the validity, the survey questions have been attached in this report’s appendix.

Data Collection

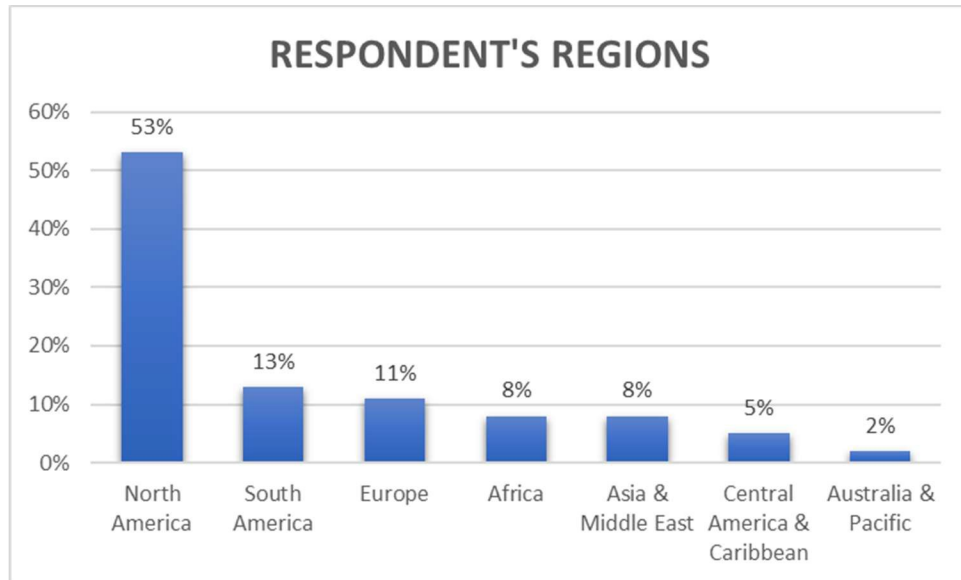
The data collection process for this report lasted about six months from November 19th, 2018 to April 26, 2019. From the third-party buyer members of IGLTA located in both the US and abroad, 96 responses were received. All these 96 respondents answered “Agree” in the first question and therefore all the responses were regarded valid. The data analysis was based on these 96 samples.

Key Findings

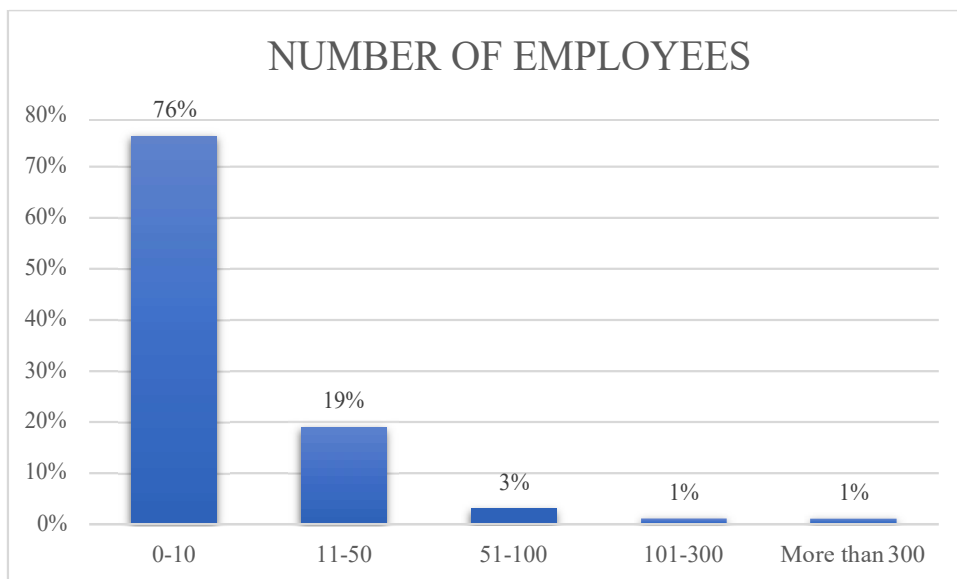
Respondents Characteristics



A total of 96 questionnaire were completed. All 96 respondents are third-party buyers including 49% of travel advisors and agents, 36% of tour operators, and 6% of meeting and events planners. The rest of 9% of respondents selected “other” including land operator and venue owner for lodging, events and weddings.

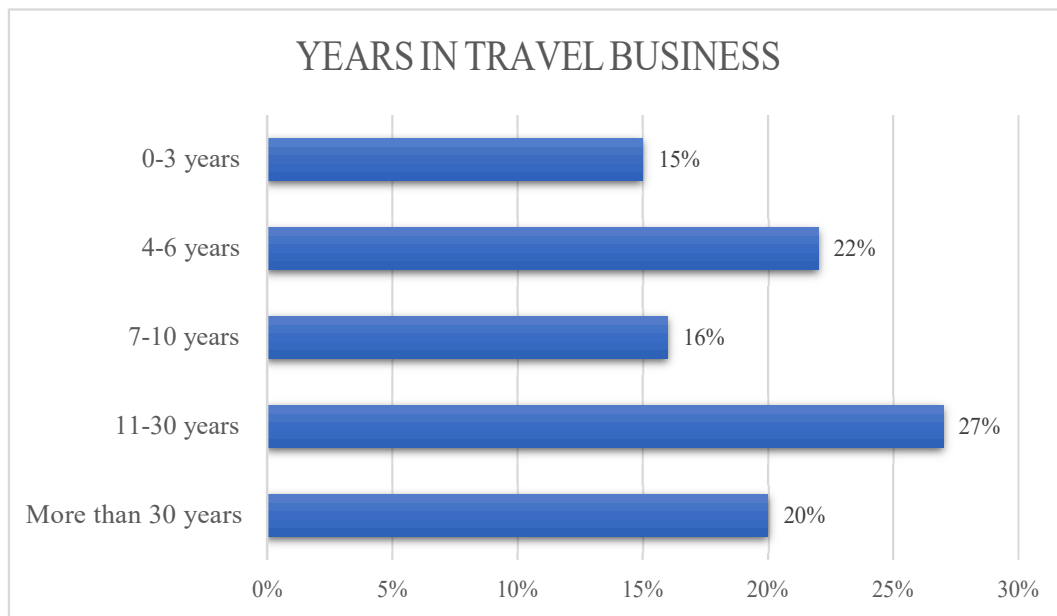


More than half (53%) of the respondents were based in North America, 13% were based in South America, 11% in Europe. Africa and Asia & Middle East had 8%. 5% of the respondents were from Central America & Caribbean and finally 2% from Australia & Pacific.

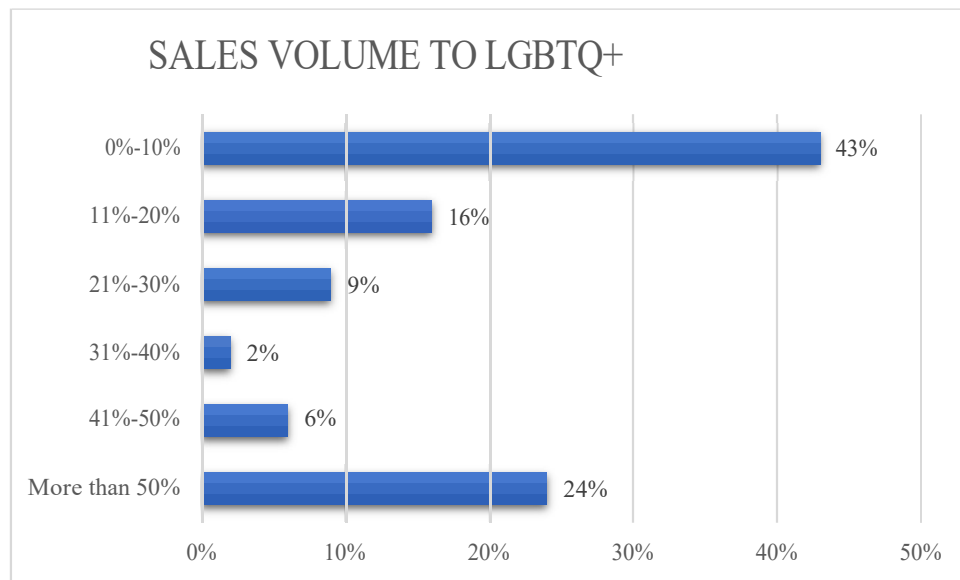


In the question “how many employees does your company (organization) have”, most of the respondents said that they are small to medium size enterprises with less than 50 employees.

(76% of respondents have 0-10 employees and 19% of respondents have 11-50 employees). A fraction (3%) of respondents have employees between 51-100 and only one company each with 101-300 employees and more than 300 employees.

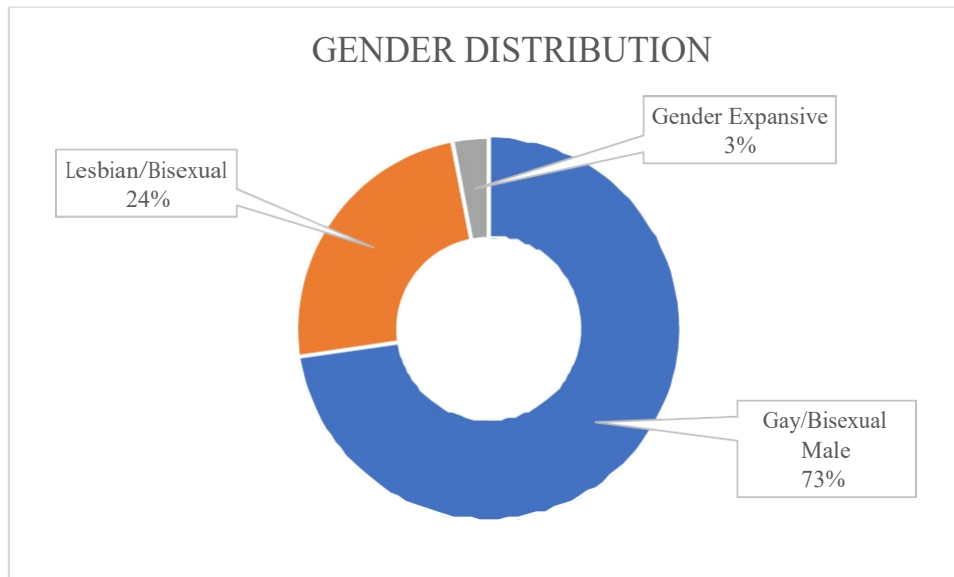


When asked about the years in travel business, over half of companies are operated less than 10 years including 15% for 0-3 years, 22% for 4-6 years, and 16% for 7-10 years. The rest of the companies operated for over 11 years (27% for 11-30 years, and 20% for over 30 years).

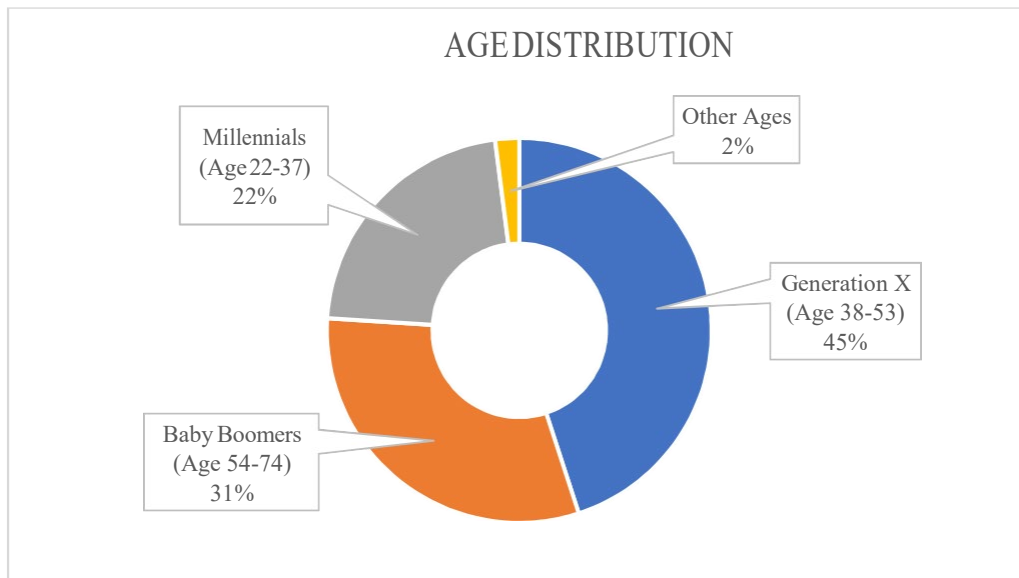


With the purpose of determine the sales volume of LGBTQ+ segment, respondents are asked about the percentage of sales represented by LGBTQ+ segment and the specific amount of revenue. The result shows the two polarization. 43% of companies stated that LGBTQ+ sales represent no more than 10% of their overall total revenue, followed by 16% of companies has LGBTQ+ sales between 11% to 20%, and 9% has LGBTQ+ sales represented by 21%-30%. A significant finding was that 24% of companies considered the LGBTQ+ segment as the primary part of their overall sales volume taking by over 50%. For the specific revenue amounts for LGBTQ+ sales, the average sales volume of total respondents was \$530,000.00. It is also important to note that the sales volume was over 1 million US Dollars for 12 companies out of 96, which means that many companies have significant revenues on this segment and provide unique and personalized products and services.

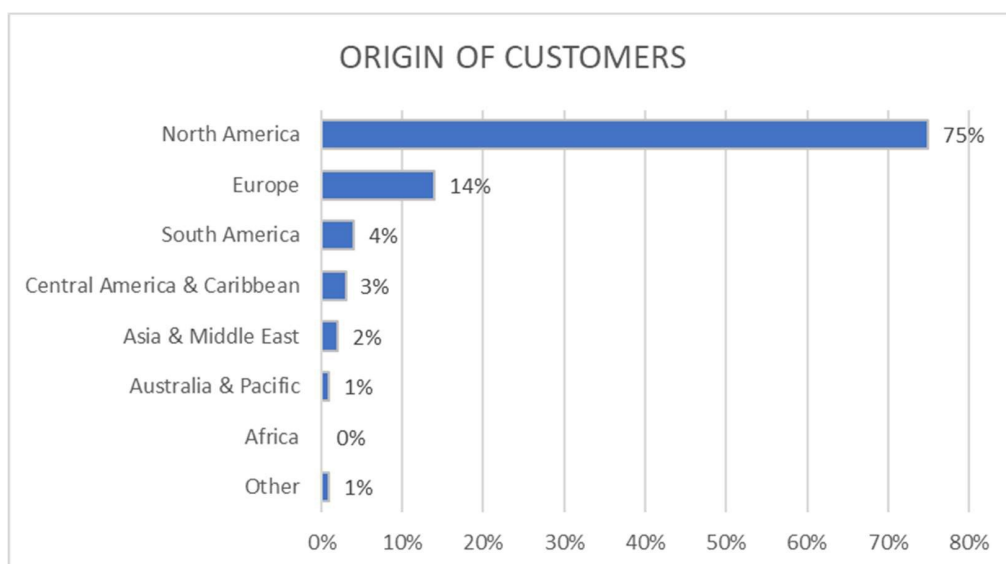
Customer Segments



The customer segments of respondents include 3 categories: gender, generation and region. When combined, gay and bisexual men account for 73% of respondents. Lesbian and bisexual women accounted for 24% of respondents and other 3% are customers who defined themselves as transgender, non-binary, genderqueer and genderfluid. This mismatch between gay/bisexual male and lesbian/bisexual female may be explained by the fact that gays are assumed to be more than lesbians. The 2011 Census data by the Office for National Statistics, UK indicate that lesbians represent 31.8% and gays 68.2% of the total gay and lesbian population (Office for National Statistics, 2011). Along the same line, the Community Marketing Report indicates that only 25% of their sample was lesbians, while gays accounted for the 74% (Community Marketing Inc., 2012).

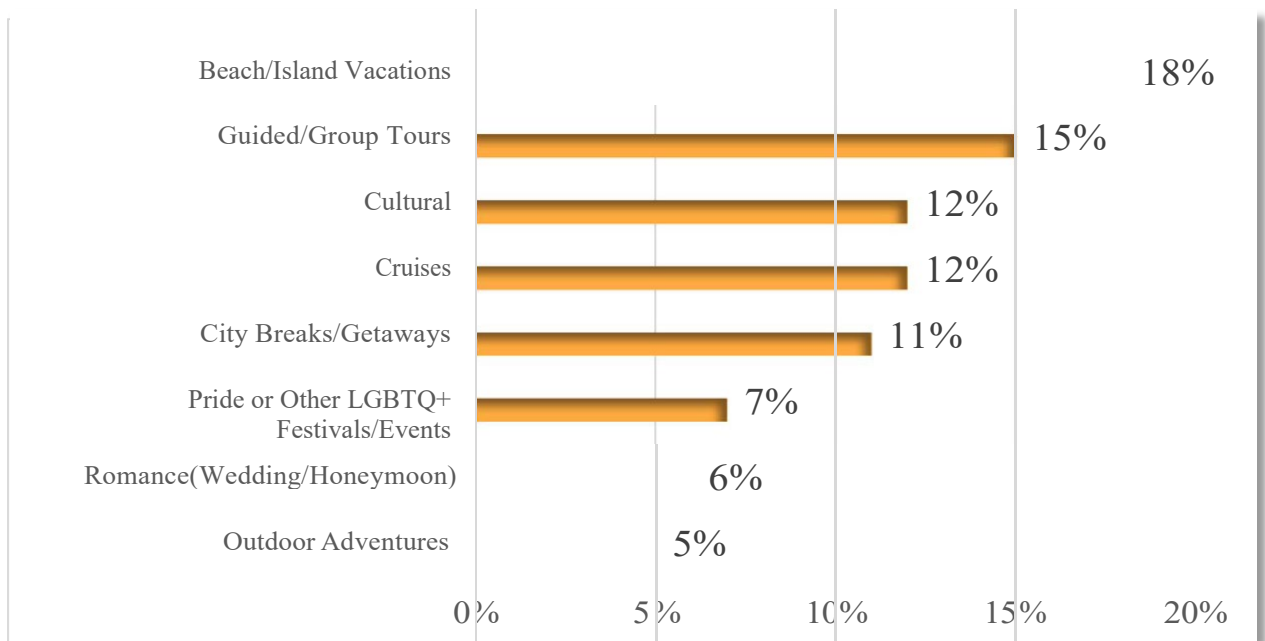


In average, roughly half of the respondents' customers (45%) are Generation X – in the 38-53 age group, and the nearly 1 in 3 customers of the respondents are Baby Boomers (54-74 years). Customers within the age of 22-37 (Millennial) account for 22% of the total share and 2% in other age groups.



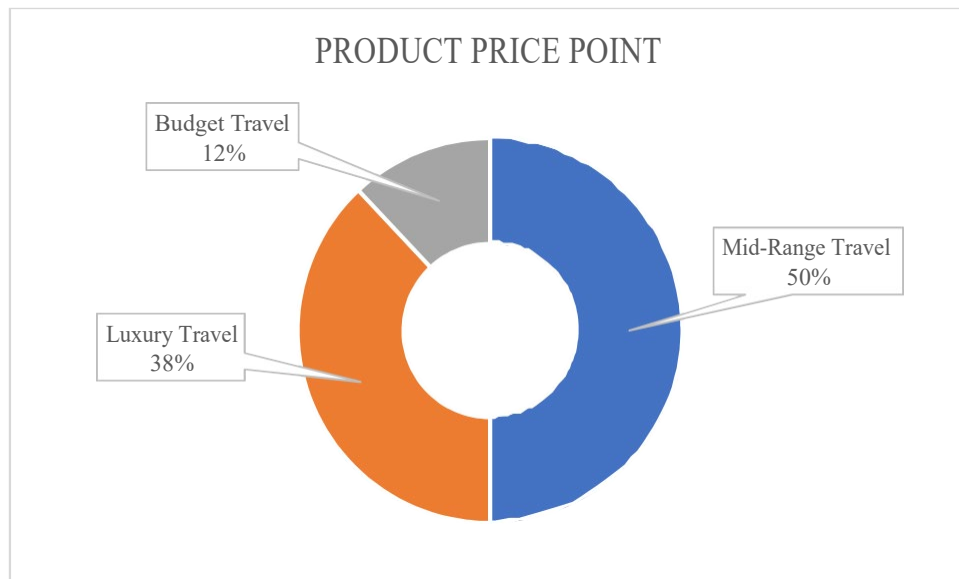
Since most of companies based in North America, over 90% of their customers come from North America (75%) and Europe (14%). 3% are from Central America and the Caribbean, 2% of customers are from Asia and Middle East, and 1% are from Australia and Pacific. No customers originate from Africa.

Products and Services Perceptions

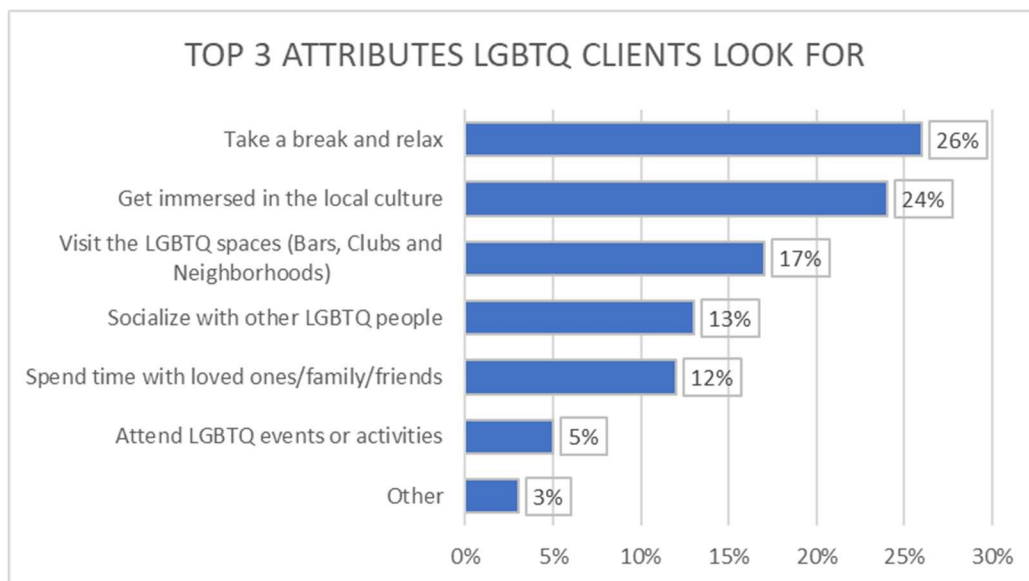


In order to figure out the popular travel products and services for LGBTQ+ segment, respondents are asked to select top 3 products and services from the list of 11 travel types, including guided/group tours, cruises, cultural tours, beach/island vacations, city breaks/getaways, pride or other LGBTQ+ events and festivals, outdoor adventures, business travel, romance (wedding and honeymoon), family travel, and wellness, based on the sales volume in last year. Beach/Island Vacations (18%), Guided/Group Tours(15%), Cultural Tours(12%) and Cruises(12%) are ranked

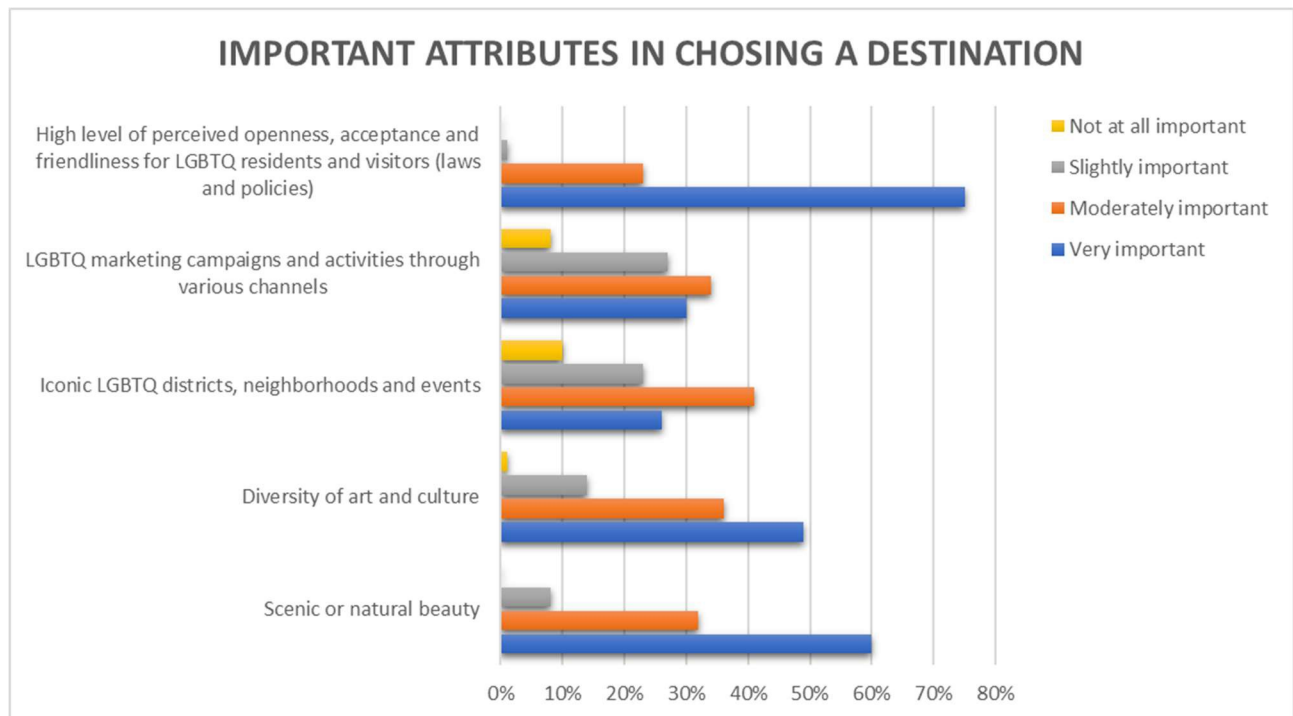
as the top four popular products, followed by City Breaks/Getaways, Pride or LGBTQ+ Events and Romance trips.



When breaking down the sales volume from price point, the mid-range price travel leads the market which account for 50%, followed by 38% luxury travel and 12% budget travel. It means that mid-range travel is still the mainstream of this segment. A striking finding is that Luxury Travel products are more than 3 times more popular in comparison to the Budget Travel. This shows that luxury products and luxury travel will be the escalating trend in the coming years.



Participants were asked to select the top 3 attributes or experiences their clients looking for. They were given 7 options including taking a break and relax, socializing with other LGBTQ+ people, getting immersed in the local culture, visiting LGBTQ+ sites, attending LGBTQ+ events and activities, spending time with loved ones/family/friends, and other. In general, it showed relatively high levels (26%) of enthusiasm to take a break and relax rather than attending events or doing activities related to history and heritage. 24% of respondents stated that their customers' trend towards seeking to get immersed in the local culture. Due to the LGBTQ+ nightlife are relatively visible and widespread throughout the world, 17% stated that their clients show the trend of visit LGBTQ+ spaces such as bars and clubs. The result of following three options shows that 13% preferred to socialize with LGBTQ+ people, 12% of customers spending time with intimate people, and 5% preferred to attend LGBTQ+ events and activities such as pride. In the other option, respondents listed similar ambitions such as to experience scenery and nature and to visit monuments.



Respondents were presented with a range of aspects of culture and city life that demonstrate LGBTQ+ acceptance in society and asked to rate how important these were when seeking a leisure destination. The spread of responses was very unbalanced. The respondents indicated that their customers are more sensitive to signs of social acceptance of LGBTQ+ people in society, especially the level of perceived openness, acceptance and friendliness for LGBTQ+ residents and visitors from laws and policies perceptive. The result showed that high level of perceived openness, acceptance and friendliness was distinctly considered as very important (75%) for this segment. Meanwhile, natural beauty (60%) and the diversity of art and culture (49%) are also treated as very important when customers planning the trip. The tendency that LGBTQ+ travelers are easily attracted by local cultural and will treat culture tour as travelling purpose also shows in the previous question about products and services perception. In contrast, the notability of marketing campaigns and activities, and iconic LGBTQ+ districts or events are relatively lower than others. Almost equal distribution of respondents considered marketing campaigns are very

important (30%) and moderately important (34%). Even roughly 35% of respondents considered marketing is less important when their clients choosing a destination. For iconic LGBTQ+ districts, neighborhoods and events, dominant respondents (41%) selected it as moderately important.

Family Travel

In family travel aspect, the research group wants to find out if the company has plans to capture this market, as the demand for LGBTQ+ family travel increases. Based on all the responses the researcher group got, 75% of the companies stated that they have plans to capture the LGBTQ+ family travel market. Respondents stated that many of their single or couple clients are parents so LGBTQ+ family market is getting bigger. Furthermore, many of the customers are looking for family experiences in areas where are friendly to LGBTQ+ families. In addition, there are several companies partnered with gay family organizations such as “Gay with Kids”, and created a special gay family trip. Most companies are willing to work with suppliers to develop attractive products for this market such as offering more inclusive group packages. Based on the result mentioned above, family experience and family package is gradually becoming the developing tendency of LGBTQ+ tourism.

Common Complaints

The researchers want to find out the most common complaints that company/organization has received from LGBTQ+ customers in regard to their travel experiences. It’s worth noting that most companies illustrated that they have not received any complaints. However, there is a small number of companies said that they have received the following complaints from LGBTQ+ customers.

- Lack of destination friendliness. A respondent mentioned that clients from safari decided

not to choose Zanzibar because of the rigid opposition to LGBTQ+ persons.

- Lack of staff friendliness and respect. A respondent said that they got an improper answer about the employees which made them annoyed from the hotel.
- Service standards and credibility. Responses said that LGBTQ+ guests suggested that room accessories should be a same-sex item such as slippers and gown etc.
- Some members also noted that some tours are considered “too gay” by their customers while some are considered “not gay enough”. It seems like there is no common definition among the tour participants in regards to what constitutes a tour that focuses on gay clients.

Marketing Strategies

In marketing strategies part, the research group wanted to find out what kind of marketing strategies that a company/organization implemented in order to drive the sales volume of LGBTQ+ tourism products and services. It's quite obvious that social media campaigns were mentioned by many of responses, such as Facebook, Instagram, and Twitter, Google Adwords, etc.

Most companies chose to partner with IGLTA. As a member of IGLTA, they can set up an LGBTQ+ honeymoon registry social media and website posts, participate in networking, and offer special products.

As one of the most important goals of annual sales and marketing plan in order to grow the volume of LGBTQ+ tourism products and services, numbers of companies host special events annually for LGBTQ+. During this kind of special event, the companies would provide giveaways, information, and travel opportunities, etc.

In addition, many LGBTQ+ travel providers do have contracts with these companies, so their products can be promoted and they can provide companies with customized marketing

materials. A response said that they have a presence in their local Pride organization at meetings and events and they purchase a travel booth at their PrideFest celebration in June each year with give away, information, travel opportunities, etc. Other responses mentioned send email blasts about travel opportunities with special trips and events worldwide.

Emerging Trends

For the emerging trends, the researcher group wants to find out what emerging trends are shaping demand in the LGBTQ+ travel segment from company perspective. According to combining the results from several questions, romance travel such as marriage, honeymoon, family travel, and wellness travel have become emerging travel types. Other mentioned responses are listed such as cruises, Instagram perfect places, and non-gay friendly destination like Jordan and Egypt.

Conclusions

Destinations & Products and/or Services

On the LGBTQ+ destination prospective, there are two types of destinations to take into consideration when considering the safety and security of LGBTQ+ travelers. Places such as the United States and Europe can be classified as mature destinations. There are many factors to consider when classifying a destination as a mature one. When it comes to LGBTQ+ travel, mature destinations have a reputation for inclusion and diversity of the LGBTQ+ travelers. These destinations have also headstreams for LGBTQ+ events. One of the most popular among these are Pride which is hosted a specific time of the year each year. Not only that but these mature destinations have also engaged with the LGBTQ+ community by implementing a sound marketing strategy for many decades (Jordan,2018).

There are also emerging destinations. Destinations that are classified as emerging have seen recent changes in laws granting the LGBTQ+ community rights in that specific destination. Not only that but, these new emerging destinations are also trying to attract attention to this specific market segment (Jordan,2018). These two destination types are specifically important to the LGBTQ+ travelers. The LGBTQ+ travelers value a high level of perceived openness, acceptance, and friendliness not only for travelers but also the LGBTQ+ residents of the destination. LGBTQ+ travelers also enjoy well scenic and natural beauty of a destination. They also appreciate diversity of the arts and local culture.

Not only does the destination itself matter but the product or service offered plays a major part in the LGBTQ+ market segment travel behavior. After collecting data, it was found that guided & group tours, cruises, and culture dominates this market. Romance, family travel, and wellness have become prominent travel types among this market segment. Many companies in this fieldof

tourism and hospitality have created specific product and services aimed at this specific market segment.

Market Analysis

Based on both category question responses and open-ended question findings, the LGBTQ+ travel market shows a few new development trends. The concept of “LGBTQ+ Travel” has been broadened as the social acceptance of LGBTQ+ segment increases. The LGBTQ+ segment becomes more visible in the press, social media and other published channels, meanwhile LGBTQ+ individuals are willing to openly identify themselves as LGBTQ+ customers. Moreover, these tourism suppliers and destination marketing organizations seek to emulate the attitude revolution to send out the LGBTQ+-friendly messages and start to engage in the LGBTQ+ community directly. More and more third-party tour operators or planners have admitted that the LGBTQ+ tourism products and/or services they are currently offering become more inclusive and diverse. Many tourism products and services are not only designed for the LGBTQ+ travelers but also their friends and families. The top two travel experiences/attributes that the LGBTQ+ segment looks for as purchasing a tourism product and/or service are coincident with what the majority of non-LGBTQ+ travelers’ expectations, such as take a break/relax and get immersed in the local culture. For example, the Millennials tend to include their non-LGBTQ+ friends and families on their vacation trips, which enlarge the entire spectrum of LGBTQ+ travel market. Moreover, there is a rising tendency of LGBTQ+ parenting, more same-sex couples are traveling with their children. They may share the similar characteristics with the heterosexual families, who are usually looking for the best-value tourism packages, including the safe travel destinations, lodging accommodations with amenities for kids and educative attractions. Besides the transformation of “LGBTQ+ Travel”, in terms of the price point, the findings are consistent with the previous literature review, which show

the current tourism products and/or services with mid-range price point are leading the market while the demand of luxury travel is increasing. Compared with heterosexual counterparts, the LGBTQ+ segment has relatively high discretionary incomes and spend more money on travelling. In addition, they pay more attention to the quality of the tourism product and/or service and value the travel experience.

Traveler Insights

LGBTQ+ “segments” cannot be treated as one homogenous group. They have diverse needs and wants in terms of the travel destinations and tourism products and/or services. For example, gay & bisexual men may have absolutely different travel motivations or interests from the lesbian & bisexual women segment. The survey audience in this research considered these diverse segments as one united group of customers, thus the findings should be applicable for the whole LGBTQ+ community. “Take a break & relax”, “Get immersed in the local culture” and “Visit LGBTQ+ historical sites and spaces” are key value drivers during their decision-making process on what tourism products and/or services to purchase. For example, New York City will host World Pride on 2019 and coincide with the 50th Anniversary of the Stonewall Uprising. Stonewall Inn located in New York City has been a demand driver for the LGBTQ+ segment to visit and celebrate the liberation movement. Simultaneously, utilize various gay spaces like LGBTQ+ neighborhood- Greenwich Village and tons of themed restaurants and nightclubs in Hell’s Kitchen district is high on traveler’s wish list as visiting New York City. According to these third-party agents, there are also some LGBTQ+ clients expressing their interests in socializing with other LGBTQ+ travelers, spending time with families and friends as well as attending LGBTQ+ events& activities during the trip. The LGBTQ+ segment’s main priority when selecting a destination to travel is “High level of perceived openness, acceptance and friendliness for LGBTQ+ residents and visitors”, followed by

“Diversity of art and culture” and “Scenic or natural beauty”. In terms of the destination choices, the LGBTQ+ segment becomes more adventurous and tries to explore some emerging destinations that have not been hyped on the mainstream media. The list of popular destination for LGBTQ+ travelers has been constantly updated since the LGBTQ+ segment tends to gain the new travel experience.

The Internet Power

The popularity of the Internet has brought many positive changes into LGBTQ+ life. First of all, the digital transformation has driven the greater process of LGBTQ+ visibility. The greater visibility helps LGBTQ+ travel generate higher level of social acceptance. It becomes easier and more convenient for both tourism suppliers and third-party travel agents in LGBTQ+ travel business to identify the LGBTQ+ market segment and deliver the personalized service. LGBTQ+ individuals are the community with a strong sense of identity, constantly sharing experiences and information and in constant virtual interaction, use all the available means of communication, especially the communication channels and online platforms, developed specifically for this community, such as online associations and forums, specialized websites and apps, and several social networks (Liberato et al. 267). The dating mobile applications (Grindr, HER, Hornet and Blued) and mainstream social networks (Instagram, Facebook and Snapchat) have been considered as the efficient distribution channels for these third-party agents to sell and promote their LGBTQ+ tourism products and/or services.

Managerial Implications

Based on the above survey findings and summarized travel trends, there are three major managerial recommendations for these third-party agents to better serve the LGBTQ+ segment.

Product Development and Diversification

First of all, these survey findings provide a clear market landscape of trendy LGBTQ+ travel types and destinations. These travel trends also illustrate why these tourism products and destinations are appealing to the LGBTQ+ segment as well as what factors are shaping demand in LGBTQ+ travel segment. No development or diversification of tourism products and/or service can be proceeded without the deep understanding of market segments' needs and wants. Similar to the typical tourism product development process, the journey of developing the LGBTQ+ tourism products and/or services should start with the preparation of a comprehensive assessment or PEST analysis (political, economic, sociocultural and technological) of the expected destinations on the trip plan. Then combined with the survey findings and current travel trends, the tour operators or agents should conduct a SWOT analysis (Strengths, Weakness, Opportunities and Threats) to carve a sustainable niche in certain marketplace. According to the ranking question responses, there are some travel types dominating the market, such as the guided tour groups, cruises and cultural tours. High market shares of these leading types of tourism products represent the huge demand from the LGBTQ+ customers. These travel agents should improve or optimize these popular products and/services they currently offering. It is necessary for these third-party tour operators/ agents to constantly research and analyze the market condition and competitors' selling strategies. Based on these travel insights responses, they should notice that several attributes or experiences are what most of their LGBTQ+ customers looking for as purchasing a tourism products and/or services, such as taking a break, getting immersed in the local culture and visiting LGBTQ+

sites as well as utilizing the gay spaces. When giving advice on where to travel for their LGBTQ+ clients, the destination they selected should be eligible and favorable, better with high level of perceived openness, acceptance and friendliness for the LGBTQ+ segment, diversity of art and culture as well and natural beauty. In addition, the demand of several emerging travel types is booming according to both ranking question and open-ended question results. The IGLTA buyer members should seize such opportunities to target the family travel, romance travel, wellness travel and adventure travel. For example, they can create some new family travel packages highlighting the long list of family-friendly attractions and accommodations. LGBTQ+ parents seek to introduce the diverse culture and arts around the world with their children. Such trips should define the travel theme- “learning through play and travel” and offer LGBTQ+ families affordable travel options along with instructive experience rather than simply put all these traditional travel products together.

Pricing Strategies

Secondly, it is very important for these third-party agents (IGLTA buyer members) to communicate the true value (including the psychological value and economic value) of their tourism products and/or services with LGBTQ+ customers. According to the open-ended question responses from these third-party agents regarding the LGBTQ+ guest complaints, one of the biggest issues was the high price. Price is the combination of the cost of tourism product and/or service and the traveler’s perceived value. Negotiating with the suppliers (such as hotels, airlines, cruises, tourist attractions, etc.) and cooperating with major LGBTQ+ organization to lower the buying expenses should be the first step for these third-party agents. The next step should be identifying the value drivers of LGBTQ+ customers. These attributes of LGBTQ+ travel ambitions and preferences can increase the psychological value of certain tourism products, then the price that

LGBTQ+ segment is willing to pay become much higher than its actual cost. Besides the value communication, these third-party agents should also ensure the consistency between the marketing promise and traveler's experience. They should be transparent in terms of the selling price and service level of the trip.

Sales Plans

Although it is very difficult to keep tracking the LGBTQ+ segment's diverse "tastes" in the tourism products and/or services as well as the travel destinations, these third-party agents can subscribe and study the periodic research report and travel newsletters from some major travel business organizations, such as IGLTA, CMI and PATA. Moreover, if there is a budget, they should conduct the small-scale targeted research to collect more feedback from their LGBTQ+ customer and better understand their purchase behaviors. Lack of staff friendliness and respect was another customer complaint based on the survey responses, therefore it is necessary for these third-party agents to educate all their employees on cultural diversity, sensitivity training and in general about the LGBTQ+ community. The visibility and acceptance do advance the sales performance. They should increase the visibility of their tourism products and/or services throughout various distribution channels, such as social media platform, mobile app and networks built by these leading LGBTQ+ associations. Many third-party agents stated that they received more LGBTQ+ business after partnering with some LGBTQ+ travel organizations. Every message or announcement added on the brochure and web banner should show the inclusivity to LGBTQ+ community. Promoting the diversity and inclusivity of the tourism products and/or services can effectively help the third-party agents to build their own authentic and distinctive brands among LGBTQ+ customers.

Limitations and Opportunities for Future Research

There were some limitations posed by the methodology and the research process of this study, including the nature of the research design, data collection and sampling techniques. Although various types of survey questions were included on each questionnaire, the researchers only utilized onefold methodology to collect the data from the subject audience, which was online survey. These qualified respondents were limited to the IGLTA members (third-party agents) who were either active on the internet or who were comfortable of communicating via emails. Some qualitative approaches (in-person interview, focus group and observations) should have employed to provide the deeper insights on the current trends in LGBTQ+ travel from a dual perspective by analyzing data from both IGLTA third-party buyers and LGBTQ+ travel industry leaders. The qualitative method could also help the researchers to understand the LGBTQ+ segment's diverse preferences and attitudes towards the tourism products and/or services. For instance, the Millennials who identified themselves as LGBTQ+ travelers may have the distinctive interests in certain travel types, travel experiences and travel destinations, compared to the Baby Boomers. These questions of the LGBTQ+ clients' age and sexual orientation & gender identity (SOGI) breakdown had been incorporated into the survey whereas the survey participants (third-party agents) would still consider their LGBTQ+ clients as one united market segment as answering the travel insight questions regarding their LGBTQ+ customers' travel motivations and interests in both tourism products and trendy destinations. Therefore, these survey responses for the first section (business outlook of these participated companies) of the questionnaire were solely valid to measure the market shares of LGBTQ+ customers of different ages and different SOGI in the marketplace. They were not sufficient to demonstrate any relationship between LGBTQ+ travel trends (such as their clients' travel interests and motivations) and their LGBTQ+ customer segments

in terms of the diverse generations and SOGI. Moreover, these survey findings may lack the generalizability due to several factors, such as the limitation of the targeted survey audience, relatively small sample size and uneven company demographic data. The targeted survey participants were extracted by the IGLTA third-party buyer members. They were extremely diverse and located all over the world unevenly. The survey findings in this study may not fully represent the overall industry trends since there are certain number of third-party agents who had not been added to IGLTA membership list.

The opportunities for the future studies can derived from the limitations of this study. The research is an exploratory research to collect the preliminary information from the third-party agent's perspective only. The future study can be done from a different perspective, specifically for LGBTQ+ individuals. The shift of the survey or interview audience to LGBTQ+ individuals on this specific topic will effectively increase the response rate and help to recognize complex identities of the LGBTQ+ segment and their diverse needs. Some challenges regarding the LGBTQ+ travelers' characteristics and their different travel preferences and motivations will be addressed as well in this scenario. For example, the future study can summarize the insights or emerging trends on lesbian travelers and transgender travelers to fill the literature gap. Furthermore, based on the survey findings (73% Gay & Bisexual Men; 45% Generation X; 75% of LGBTQ+ customers from the North America), it will be worth conducting a research to investigate what tourism products and services, travel experience and travel destinations appealing to this specific group of travelers who identify themselves as gay or bisexual men with 38-53 age range and come from North America. In addition, it was very interesting to see the rapid diversification in terms of the trendy destinations appealing to LGBTQ+ travelers, thus the future study can also concentrate on the destination development by conducting some case studies to investigate how these localized

tourism organizations are marketing and promoting their tourism resources to the LGBTQ+ segment.

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Appendix

Permission Letter Email

Dear IGLTA Members,

As a valuable IGLTA member, you are invited to participate in this LGBTQ+ tourism research project. The study has been commissioned with the aim of helping IGLTA members to collect the information to better serve our LGBTQ+ travelers based on the results and findings from the online survey. Specifically, this study will identify the current trends in LGBTQ+ travel and investigate what products and services are appealing to our LGBTQ+ communities.

This survey is part of a student research project studying the current trends in LGBTQ+ travel being conducted by a group of graduate students from the Jonathan M. Tisch Center for Hospitality and Tourism at New York University's School of Professional Studies. This project is moderated by Dr. Tamer Avcilar (Faculty Mentor). Our research team would also like to acknowledge the support and valuable contributions from the sponsor, IGLTA, for this project.

Your participation is strictly voluntary and very much appreciated. Please go to the URL listed below to complete and submit your survey responses. The survey should take no more than 15 minutes to complete. If you have any questions concerning this research, please contact our research team or Dr. Avcilar, the faculty mentor, at any time. For questions about your rights as a research participant, you may also contact the University Committee on Activities Involving Human Subjects at New York University, 212-998-4808 or human.subjects@nyu.edu.

Follow this link to the Survey:

https://nyu.qualtrics.com/jfe/form/SV_cUWHrkYRWA2YOlh

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Questionnaire

Thank you for participating in our survey

Your responses are anonymous. No identifiers will link you to the study in any manner. If you agree to participate in this study, you will be asked to fill out the questionnaire, which will take about 15 minutes. Your responses to questions will be greatly appreciated. All responses will be used only for the purpose of this study.

If you have any questions, please contact Dr. Tamer Avcilar by email at ta57@nyu.edu

By checking the "Agree" box below, you can confirm that you have read and understood the information provided that you agree to participate in this survey.

I have read and understood the information provided above, and I agree to participate in this survey.

- Agree
- Disagree

1. Which of the following options best describes your business?

- o Travel Advisors/Agents
- o Tour Operators
- o Meeting/Event Planners
- o Other (Please fill-in if "Other" is selected)

2. In what region and/or country is your company based? (Drill Down Question)

- Region
- Country
- City

3. How many employees does your company or organization have?

- o 0-10
- o 11-50
- o 51-100
- o 101-300
- o ≥301

4. How long has your company (organization) been in the travel business?

- o 0-3 years
- o 4-6 years
- o 7-10 years
- o 11-30 years
- o More than 30 years

5. In the past 12 months, what percentage of overall sales was represented by LGBTQ+

sales? o 0%-10%

o 11%-20%

o 21%-30%

o 31%-40%

o 41%-50%

o More than 50%

6. In the past 12 months, how much revenue was represented by LGBTQ+ sales?

(in U.S. Dollars, please enter your numbers without the \$ sign)

7. What is the percentage breakdown of your LGBTQ+ customers in terms of sexual orientation or gender identity? (Constant Sum Question)

(Please ensure the ratios total 100%)

Gay / Bisexual Male

Lesbian/ Bisexual Female

Gender Expensive

(*Gender-Expansive includes individuals who consider themselves Transgender, Non-Binary, Genderqueer and/or Gender Fluid)

8. What is the percentage breakdown of your LGBTQ+ customers in terms of the age?(Constant Sum Question)

(Please ensure the ratios total 100%)

Millennial (Individuals whose ages are between 22 and 37)

Generation X (Individuals whose ages are between 38 and 53)

Baby Boomers (Individuals whose ages are between 54 and 74)

Other Ages

9. Based on sales performance or volume over the past 12 months, what are your top three LGBTQ+ tourism products and/or services?

(Please select exactly three options)

- o Beach/Island Vacations
- o Business Travel
- o City Breaks/Getaways
- o Cruises
- o Cultural
- o Family Travel
- o Pride or Other LGBTQ+ Festivals / Events
- o Guided/ Group Tours
- o Outdoor Adventures (Hiking / Camping)
- o Romance (Wedding / Honeymoon)
- o Wellness
- o Other (Please fill-in if “other” is selected)

10. When you consider the volume or performance of your sales to the LGBTQ+ community over the past year, how would you break down those numbers from a price point: budget travel, mid-range travel or luxury travel? (Constant Sum Question)
(Total needs to add up to 100%)

Budget Travel

Mid-range Travel

Luxury Travel

11. Which region do most of your LGBTQ+ customers come

from? o Africa

o Asia & Middle East

o Australia & Pacific

o Central America & Caribbean

o Europe

o North America

o South America

o Other

12. Please list the top five destinations for your LGBTQ+ clients in the past 12 months, either for leisure or business travel. (Can be cities or countries)

Top 1:

Top 2:

Top 3:

Top 4:

Top 5:

13. Of the options listed, what are the top three attributes (experiences) that your LGBTQ+ clients look for when purchasing a tourism product or service? (Please select exactly three options)

- ☐ To take a break and relax
- ☐ To socialize with other LGBTQ+ people
- ☐ To get immersed in the local culture
- ☐ To visit the LGBTQ+ spaces (Bars, Clubs and Neighborhoods)
- ☐ To attend LGBTQ+ events or activities
- ☐ To spend time with loved ones/family/friends
- ☐ Other (Please fill-in if “other” is selected)

14. Of the options listed, how important is each attribute for your LGBTQ+ clients when choosing a destination to travel? (Matrix Table Question)

	Very important	Moderately important	Slightly important	Not at all important
High level of perceived openness, acceptance and friendliness for LGBTQ+ residents and visitors (laws and policies)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
LGBTQ+ marketing campaigns and activities through various channels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Iconic LGBTQ+ districts, neighborhoods and events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Diversity of art and culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scenic or natural	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

beauty				
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15. As the demand for LGBTQ+ family travel increases, does your company have plans to capture this market? If yes, please explain.

16. What are the most common complaints your company/organization receives from your LGBTQ+ customers in regard to their travel experiences?

17. What marketing strategies, if any, has your company/organization implemented in order to drive the sales volume of LGBTQ+ tourism products and services?

18. From a company perspective, what emerging trends are shaping demand in the LGBTQ+ travel segment?