

Developed by



**AITGL**  
ENTE NAZIONALE TURISMO LGBTQ+

In partnership with



**IGLTA**  
ADVANCING  
LGBTQ+ TRAVEL

# Italy: the LGBTQ+ travelers' experience

**Marianna di Salle**

Coordinator I Master in Tourism Economics and Management  
Bocconi University

IGLTA 38<sup>th</sup> Global Convention  
26 - 29 October 2022 | Milan

# Introduction

This study analyzed the behavior of almost **1,000 LGBTQ+ travelers** (mainly North American and European) in order to:

- understand what are the **top of mind holiday destinations**;
- assess the **perceived LGBTQ+ friendliness of 8 European countries** and compare **Italy** to its main competitors;
- investigate the **travel behavior of LGBTQ+ people on vacation in Italy**;
- get some general **insights on LGBTQ+ holiday behavior**.

Answers were collected through a **CAWI survey** promoted on different channels between **May and August 2022**.

The survey asked **30 questions** in 4 sections (profile, Italy's competitive set, travel experience to Italy, travel behavior).

In order not to affect the responses, the **questionnaire did not state what was its main focus: Italy**.

This study was carried out within the **Master in Tourism Economics and Management** for **AITGL** in partnership with **Sonders&Beach** and **IGLTA Foundation**.

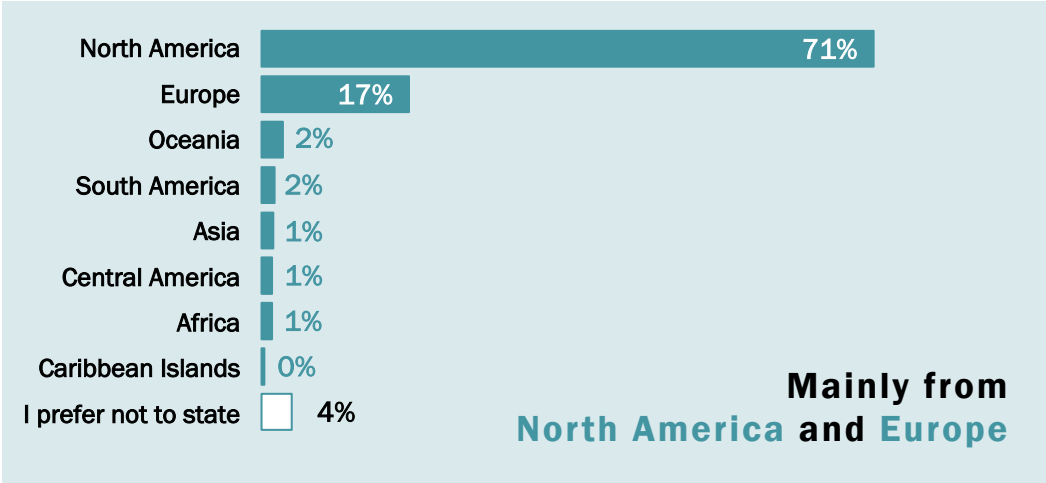


# **The sample**

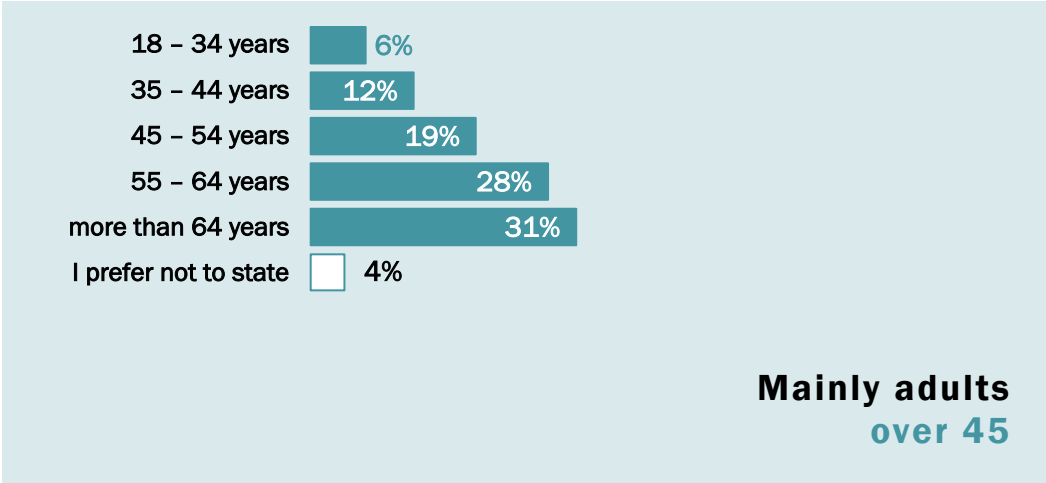
# The sample at a glance /1

968 respondents

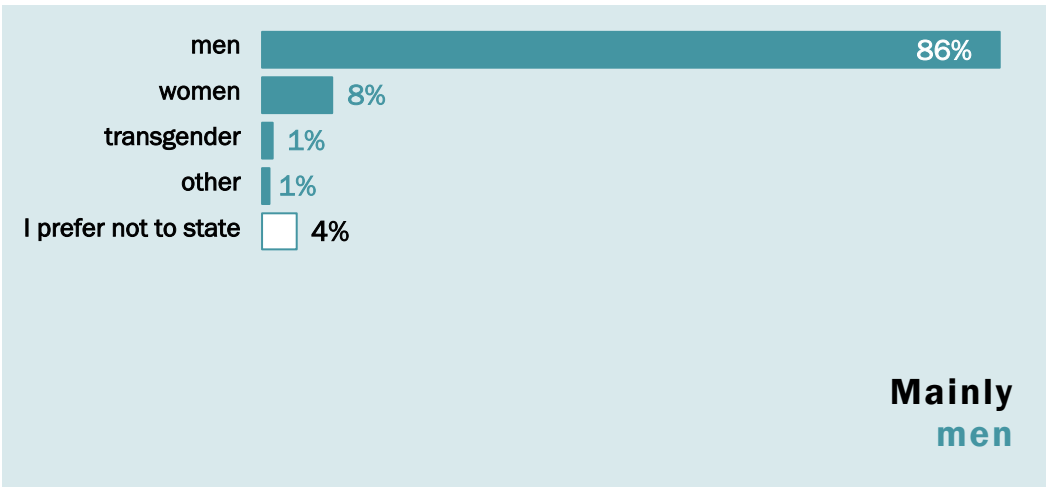
## Country



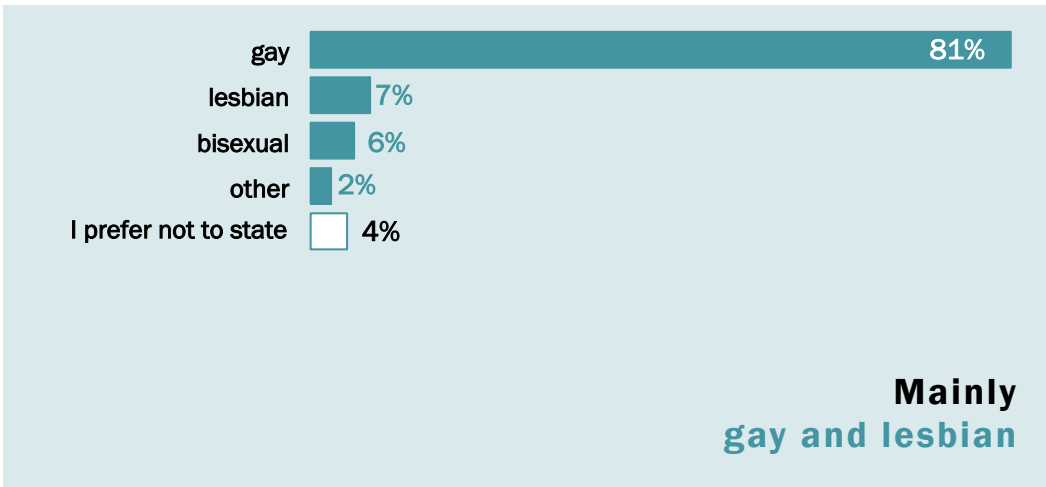
## Age



## Gender Identity



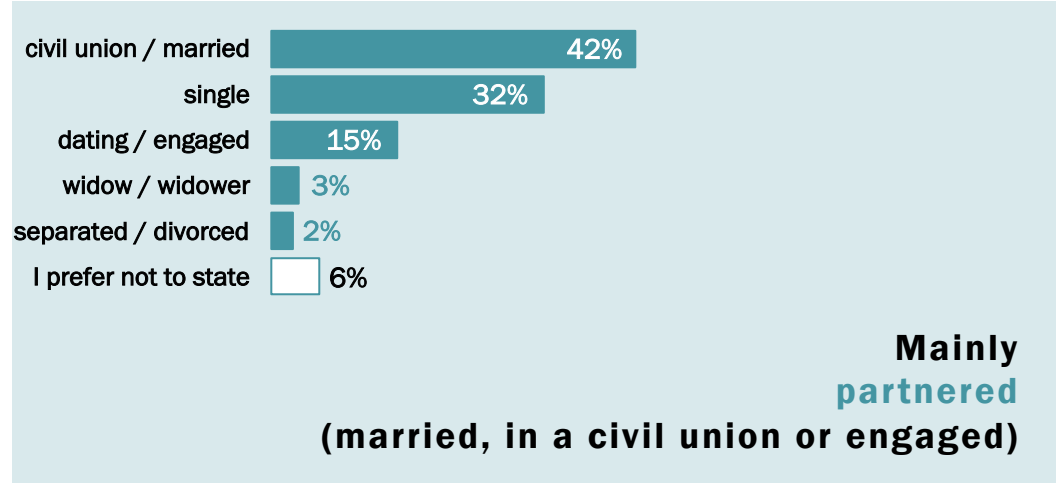
## Sexual Orientation



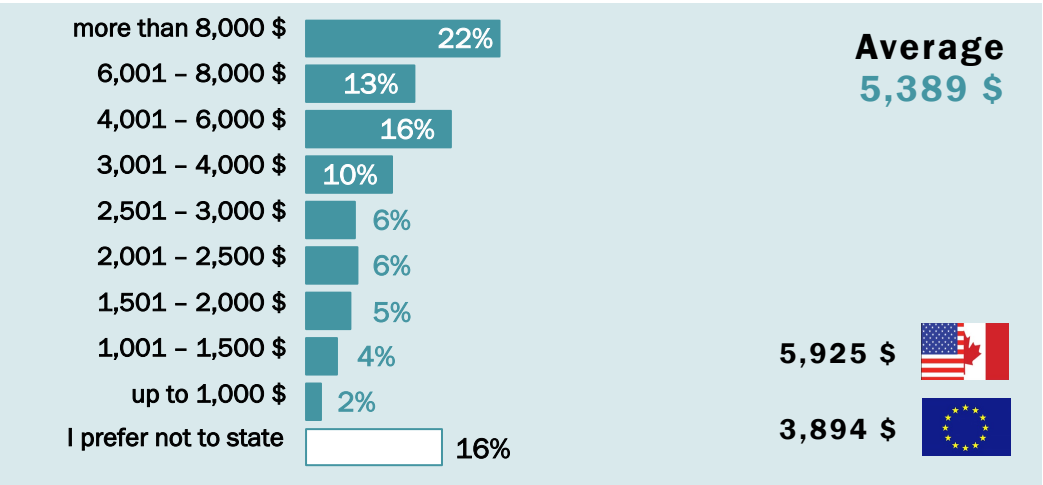
# The sample at a glance /2

968 respondents

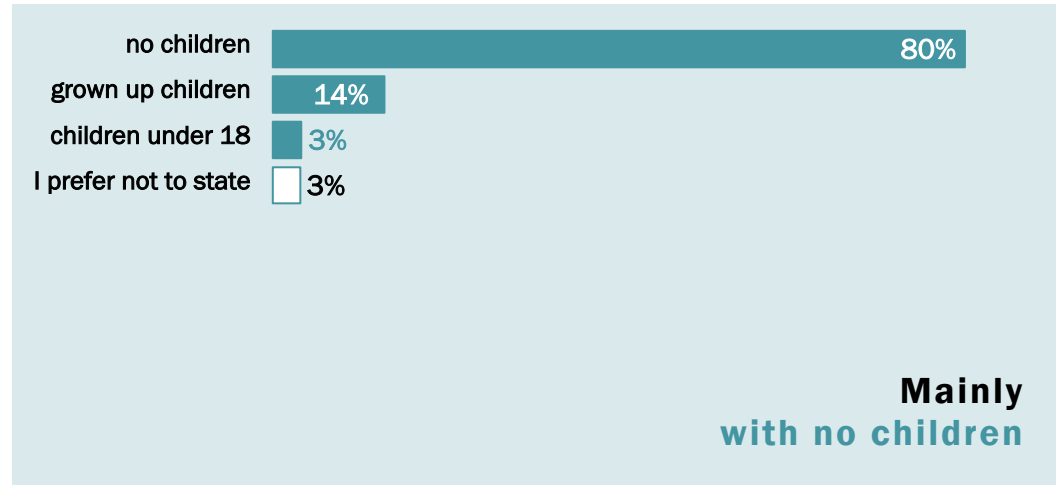
## Marital Status



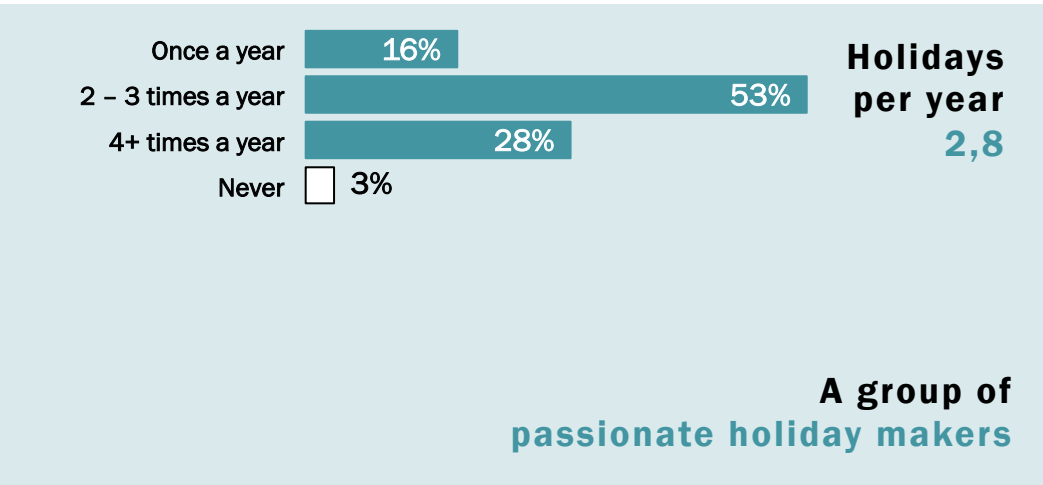
## Individual Net Monthly Income



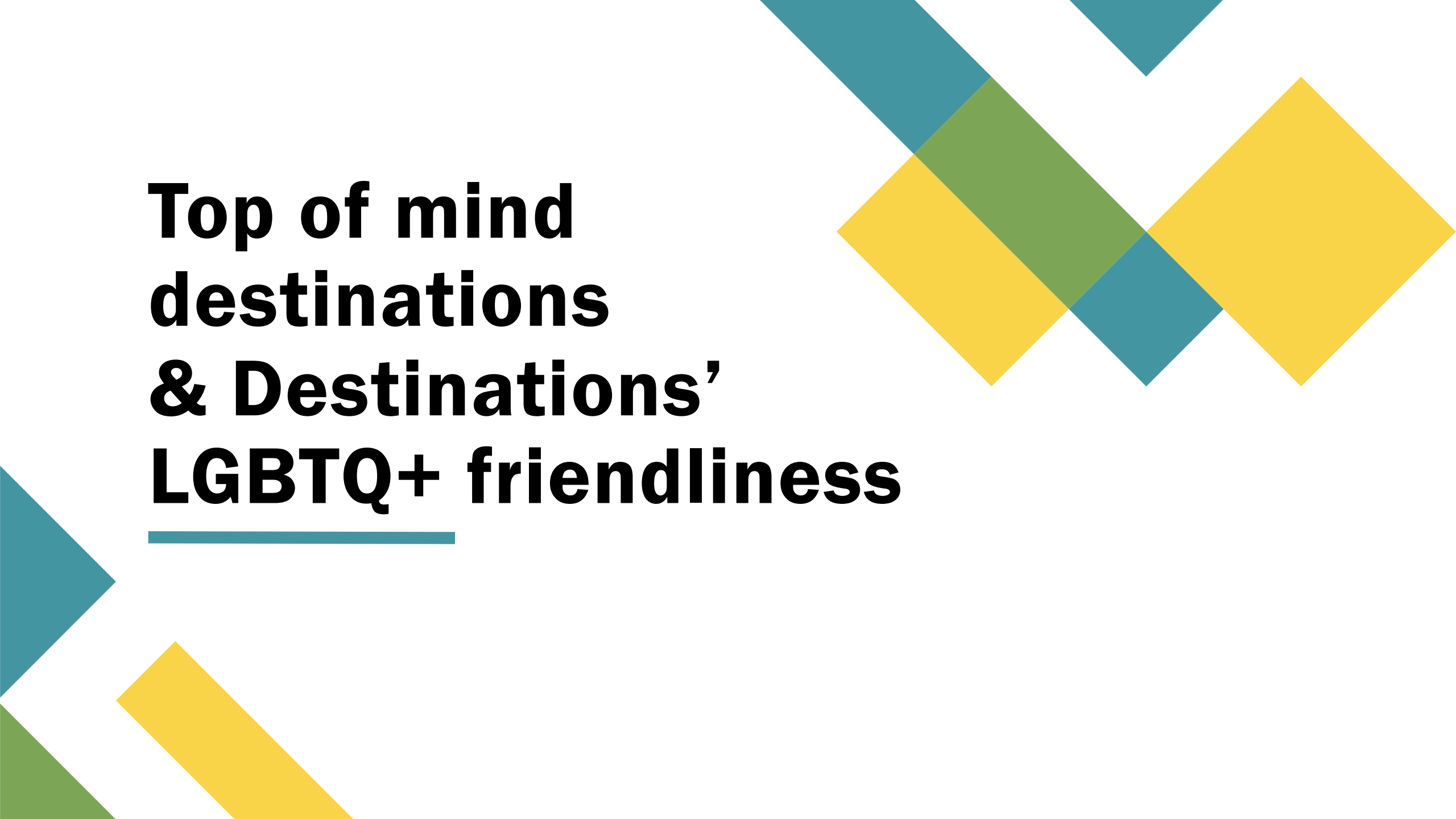
## Children



## Holiday Experiences

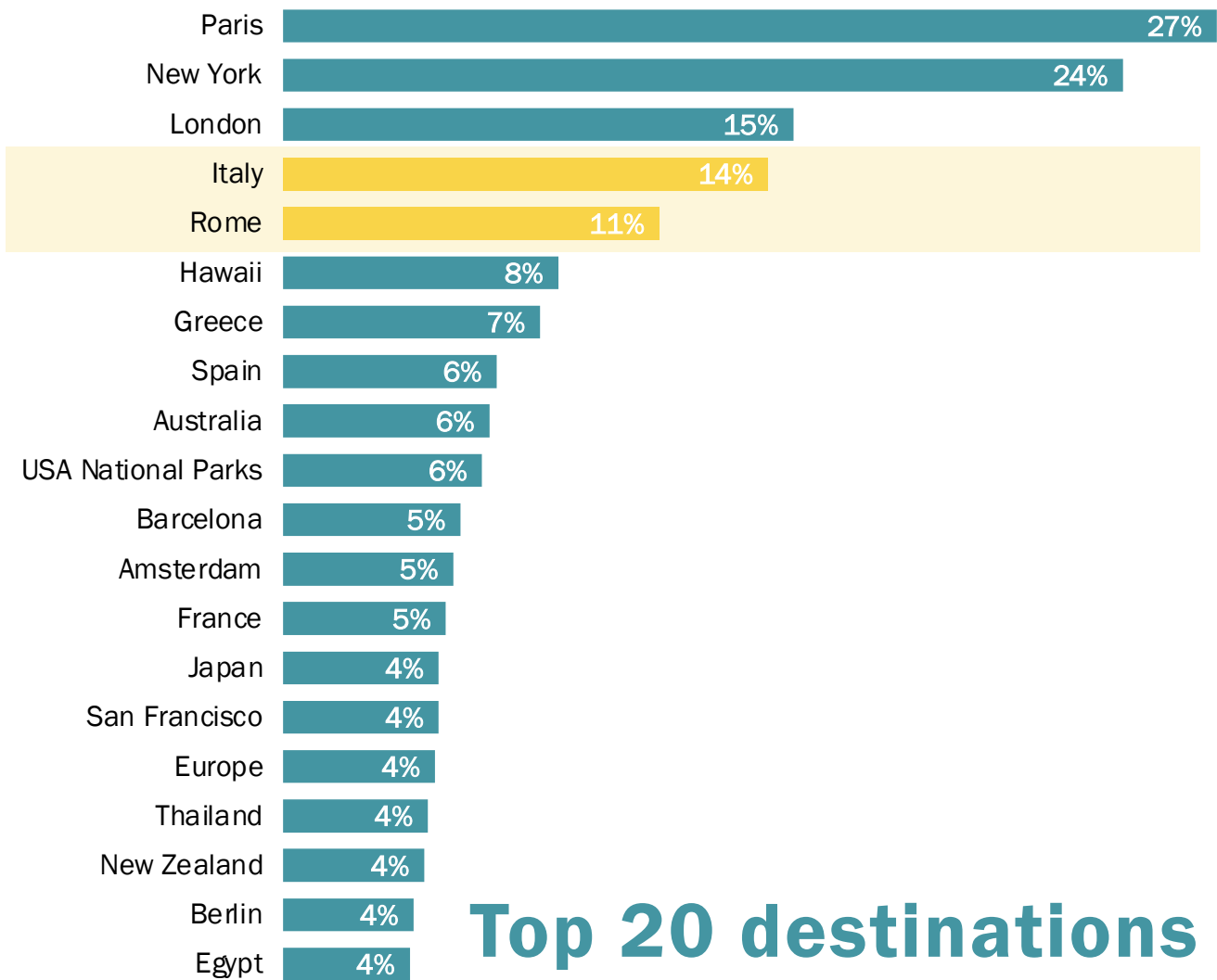


# **Top of mind destinations & Destinations' LGBTQ+ friendliness**



# Top of mind destinations

In your opinion, what are the 3 destinations everyone should visit at least once in their life? (open answer)



Top 20 destinations

n. 968 | Percentage on the number of respondents

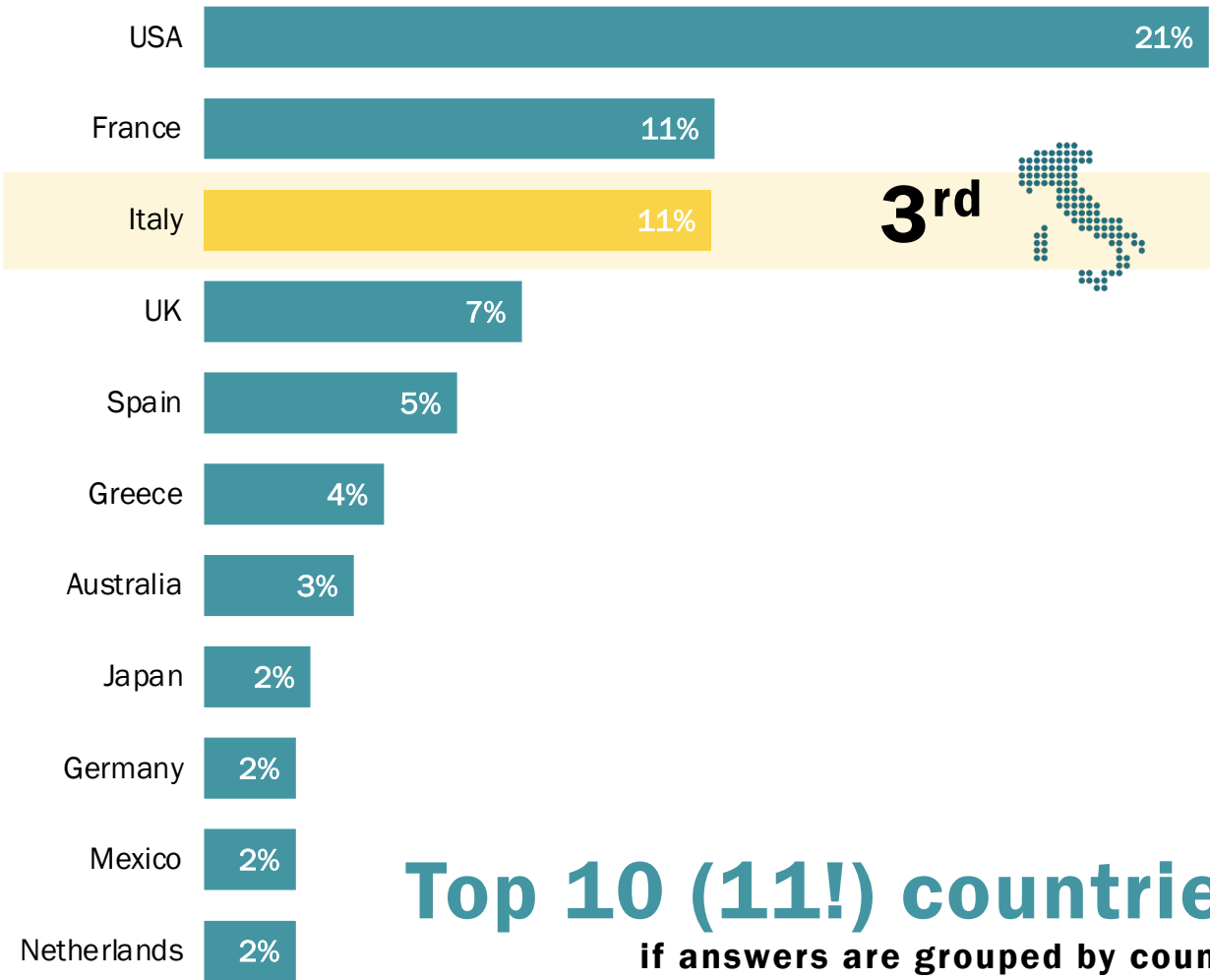
4<sup>th</sup>



5<sup>th</sup>



# Countries not to miss



**Top 10 (11!) countries**  
if answers are grouped by country

n. 2.904 | Percentage on the number of answers

*In your opinion, what are the 3 destinations everyone should visit at least once in their life? (open answer)*

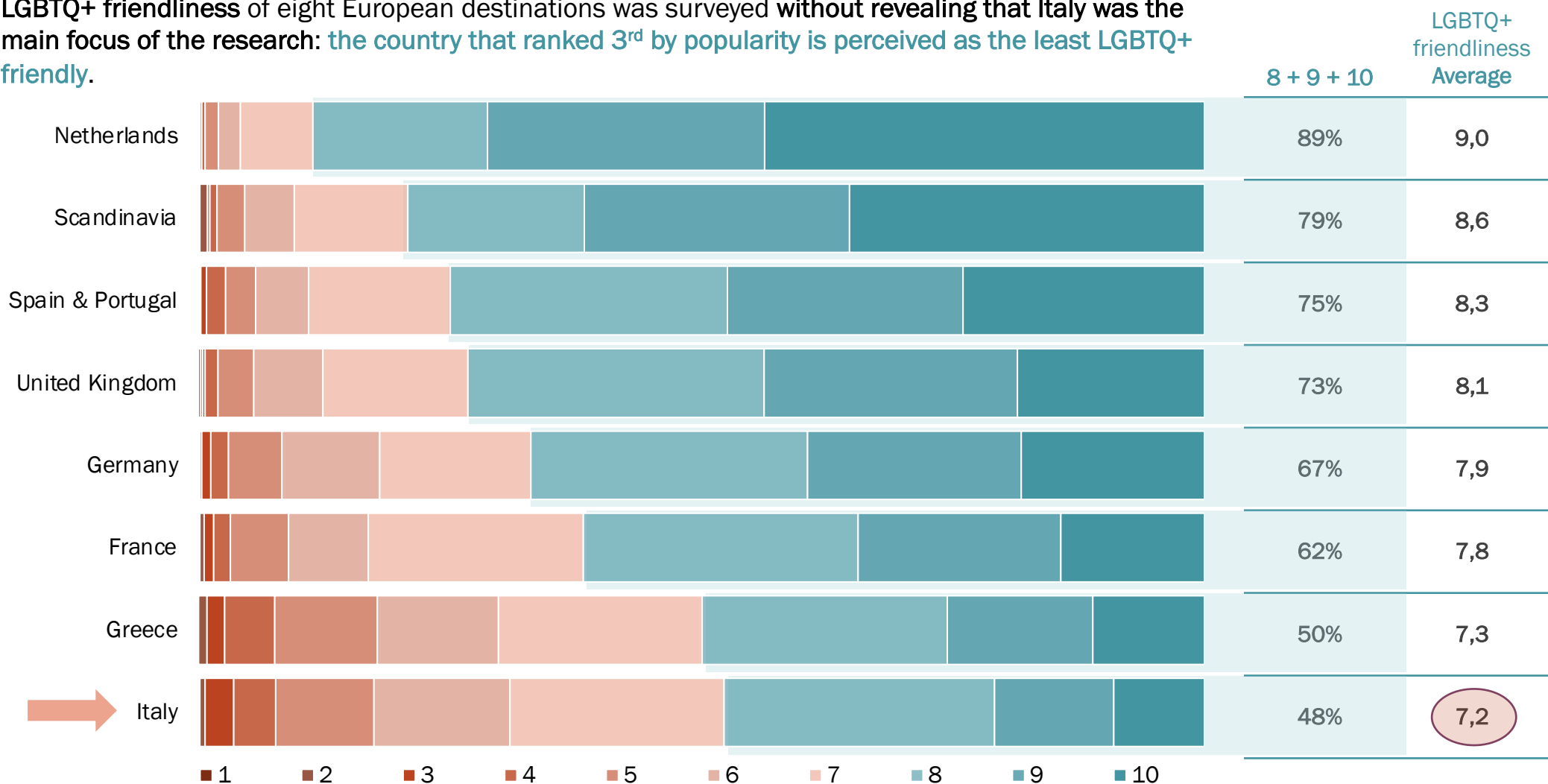
Country	Destinations (number of answers)
USA (604)	New York (232), Hawaii (76), National Parks (55), San Francisco (43), Alaska (34), USA (27), Key West (16), Other 37 destinations (121)
France (307)	Paris (258), France (45), Other 4 destinations (4)
Italy (305)	Italy (134), Rome (104), Venice (32), Other 14 destinations (35)
UK (191)	London (141), UK (28), Other 9 destinations (22)
Spain (152)	Spain (59), Barcelona (49), Madrid (16), Other 4 destinations (28)
Greece (108)	Greece (71), Mykonos (16), Other 5 destinations (21)
Australia (90)	Australia (57), Sydney (22), Other 5 destinations (11)
Japan (64)	Japan (43), Tokyo (16), Other 2 destinations (5)
Germany (55)	Berlin (36), Germany (14), Other 4 destinations (5)
Mexico (55)	Mexico (26), Puerto Vallarta (16), Other 9 destinations (13)
Netherlands (55)	Amsterdam (47), Netherlands (8)



# LGBTQ+ friendliness /1

How much do you think the following countries are LGBTQ+ friendly and could offer a nice holiday experience to LGBTQ+ travelers?

LGBTQ+ friendliness of eight European destinations was surveyed without revealing that Italy was the main focus of the research: the country that ranked 3<sup>rd</sup> by popularity is perceived as the least LGBTQ+ friendly.



n. 968 | Scale: 1 Not LGBTQ+ friendly at all - 10 Very LGBTQ+ friendly

Scandinavia = Norway, Sweden, Denmark, Finland, Iceland, Scandinavia

# Focus on Italy

*How much do you think the following countries are LGBTQ+ friendly and could offer a nice holiday experience to LGBTQ+ travelers?*

## LGBTQ+ friendliness



**Average score: 7,2**

... but the **perception** of Italy as an LGBTQ+ friendly destination changes according to **travel experiences** in Italy:

**Never been to Italy 6,9**

**First timers 7,4**

**Repeaters 7,2**

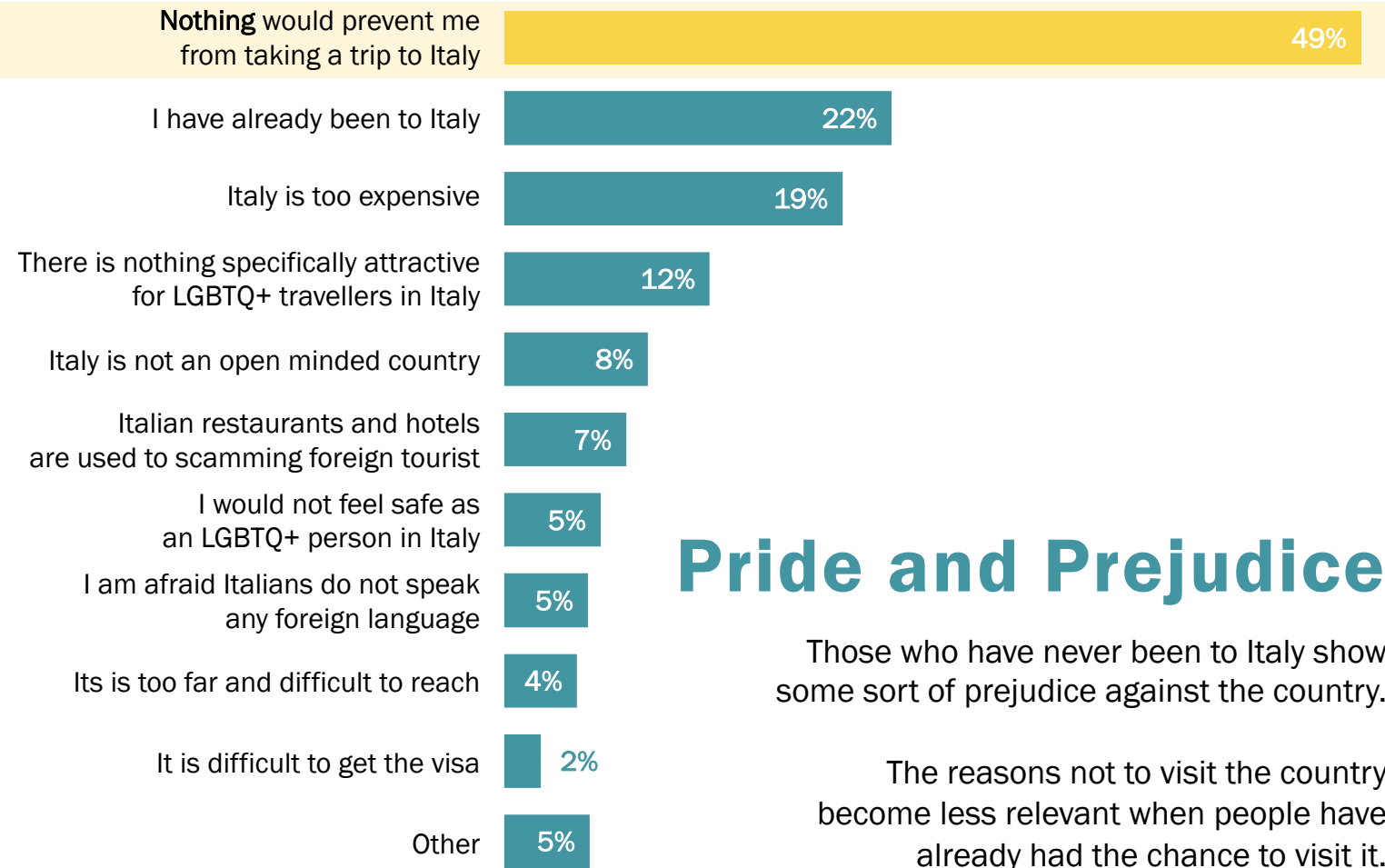
Photo: Wikipedia | Mnemoc



# **LGBTQ+ travelers' perception on Italy**

---

## Reasons not to visit



n. 968

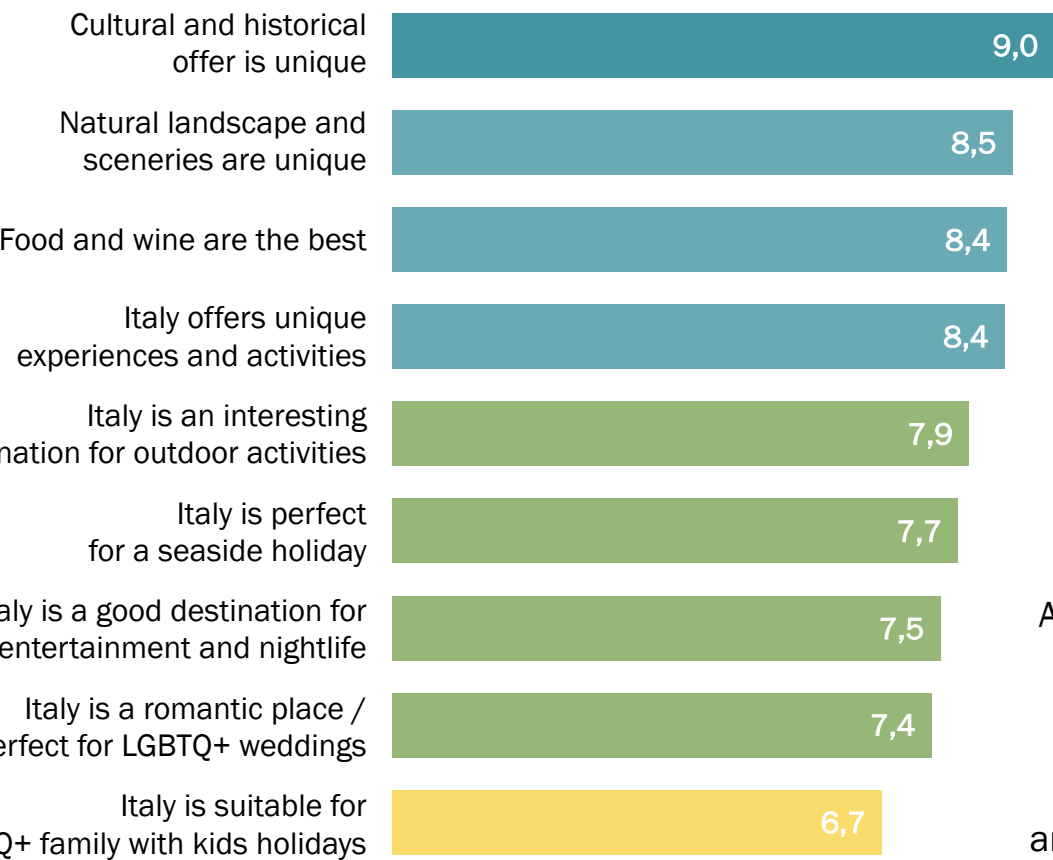
## Pride and Prejudice

Those who have never been to Italy show some sort of prejudice against the country.

The reasons not to visit the country become less relevant when people have already had the chance to visit it.

Never been	First timers	Repeaters
44%	43%	53%
-	31%	28%
29%	19%	15%
10%	5%	8%
8%	6%	7%
9%	6%	4%
10%	3%	3%
9%	4%	2%
5%	1%	1%
6%	6%	4%

## Perception of the tourist offer: attractors



n. 968 | Scale: 1 Completely disagree – 10 Completely agree

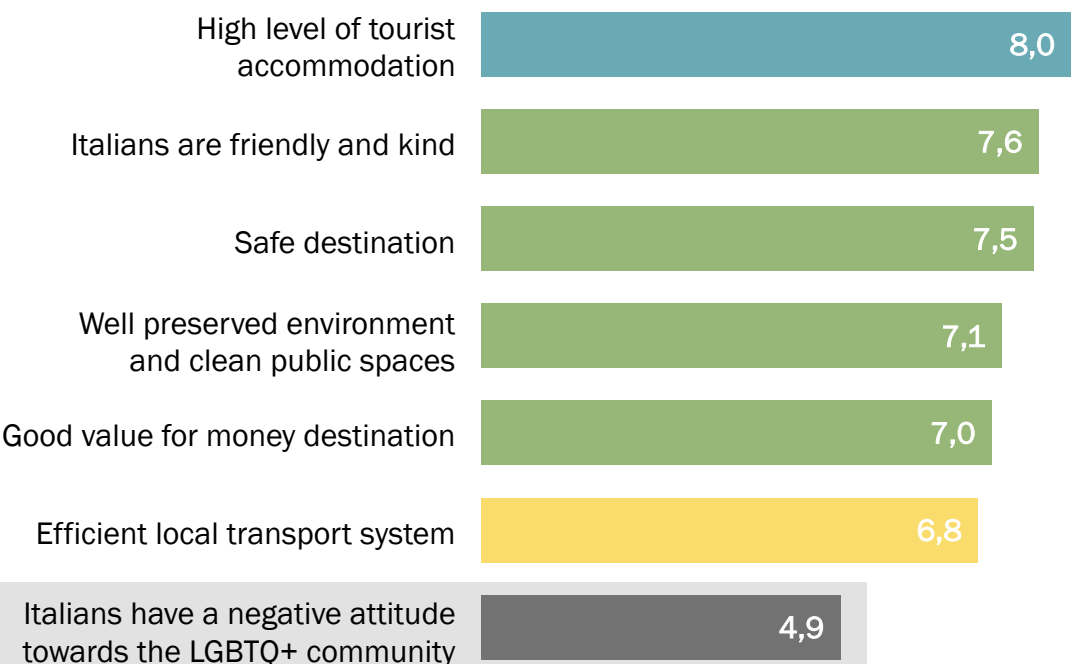
According to your knowledge and experience of *Italy*, how much do you agree with the following statements regardless of whether you have visited Italy or not?

### A good image

Although Italy gets very high evaluations for its cultural and historical offer, natural landscape, food, wine and unique experiences, the perception of the country is consistently lower amongst those who have never visited it.

Never been	First timers	Repeaters
8,5	9,1	9,3
8,1	8,6	8,6
7,8	8,3	8,7
7,8	8,5	8,5
7,5	7,8	8,0
7,4	7,6	7,9
7,1	7,5	7,6
6,7	7,4	7,6
6,1	6,7	6,9

## Perception of the tourist offer: country



It's a negative sentence: a low average is a positive score!

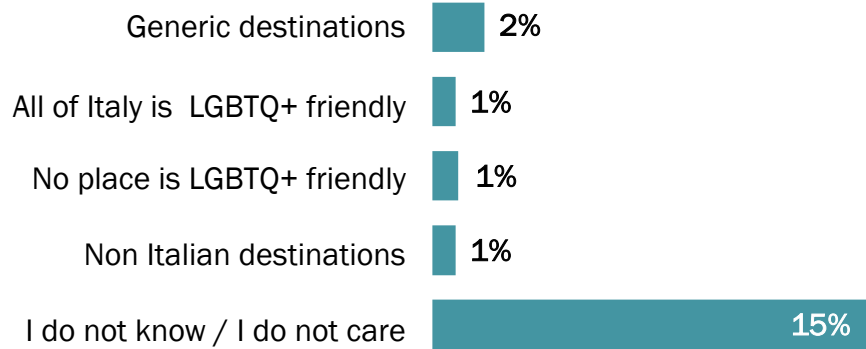
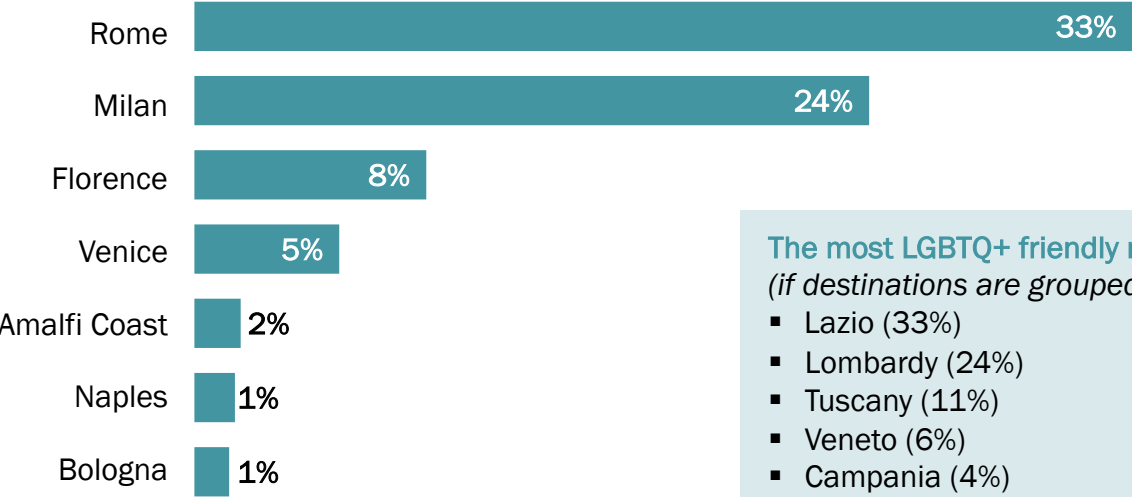
### A slightly less good image

The tourist support system and the country are perceived in a positive way (though not as good as its attractors).

There is again a problem of perception amongst those who have never been to the country.

Never been	First timers	Repeaters
7,5	8,2	8,2
7,0	7,6	7,9
7,0	7,7	7,8
6,8	7,2	7,2
6,4	7,1	7,1
6,5	6,9	6,9
5,3	4,8	4,8

LGBTQ+ most friendly places



n. 968

The most LGBTQ+ friendly regions  
(if destinations are grouped by region)

- Lazio (33%)
- Lombardy (24%)
- Tuscany (11%)
- Veneto (6%)
- Campania (4%)
- Emilia Romagna (2%)

Regions whose destinations were NOT mentioned

- Abruzzo
- Basilicata
- Marche
- Molise
- Valle d'Aosta

Other destinations	Percentage
Tuscany	1%
Capri, Torre del Lago	0,7%
Viareggio	0,6%
Sicily	0,5%
Torino, Verona	0,4%
Italian Riviera, Portofino, Puglia, Sorrento, Trieste	0,3%
Catania, Cinque Terre, Emilia Romagna, Gallipoli, Sanremo	0,2%
Calabria, Campania, Genoa, Ischia, Merano, Noto, Padua, Palermo, Pisa, Procida, Rimini, Sardinia, Siena, Spoleto, Veneto	0,1%

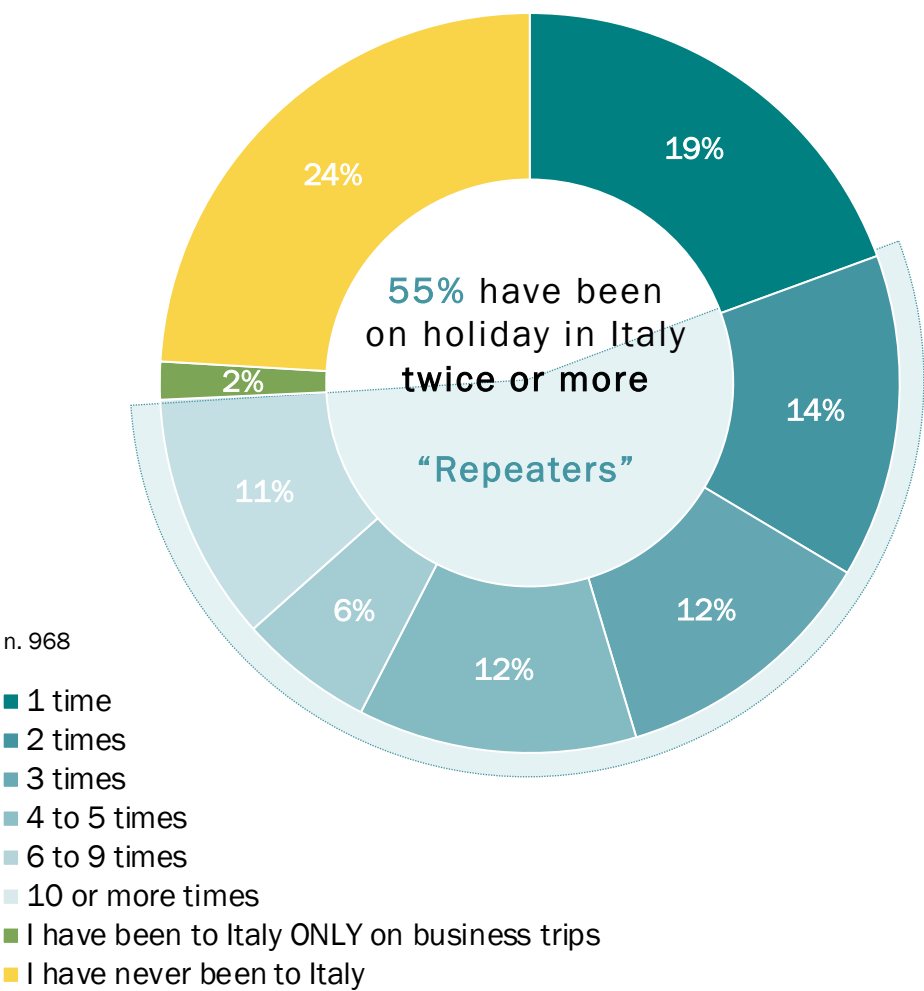


# **Travel behavior of LGBTQ+ tourists in Italy**



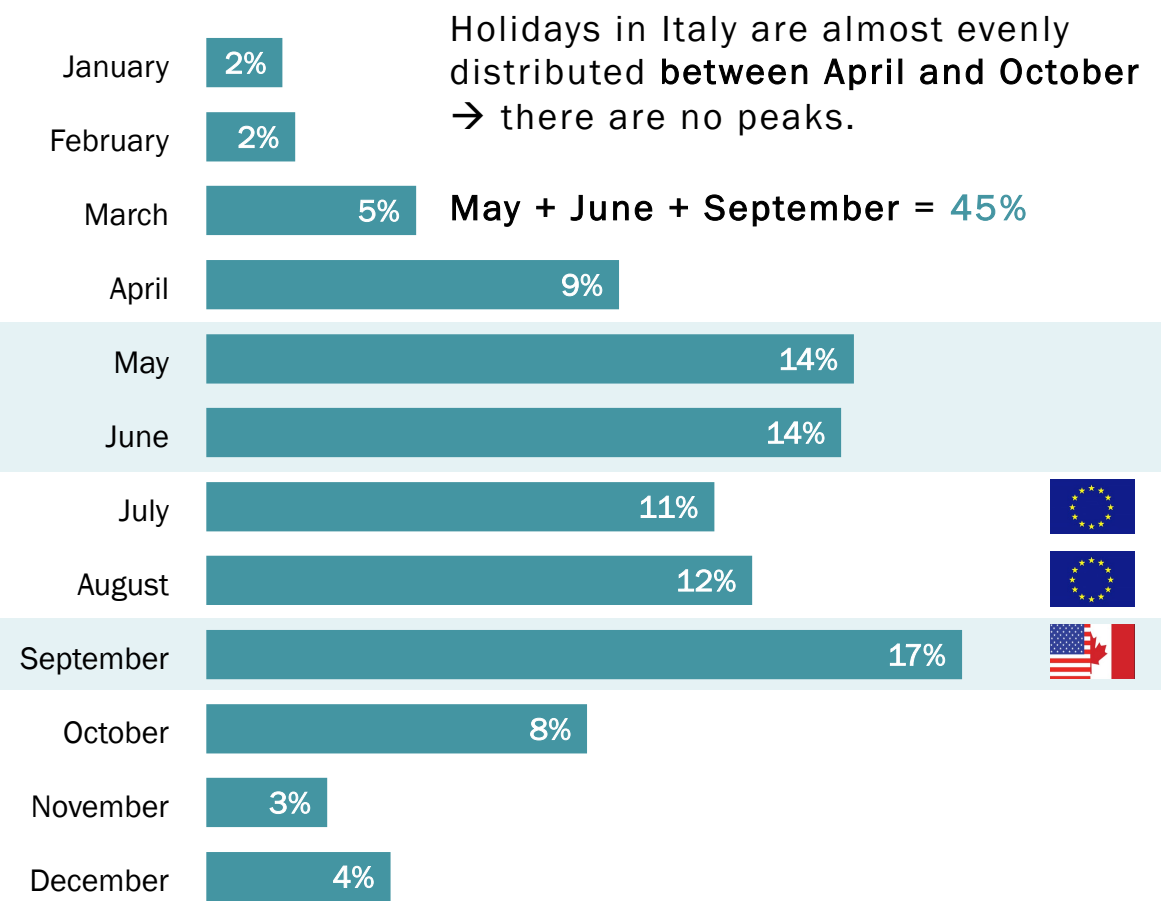
# Holidays in Italy

## Travel experience



How many times have you been to Italy on holiday?  
In which month of the year was your last Italian holiday?

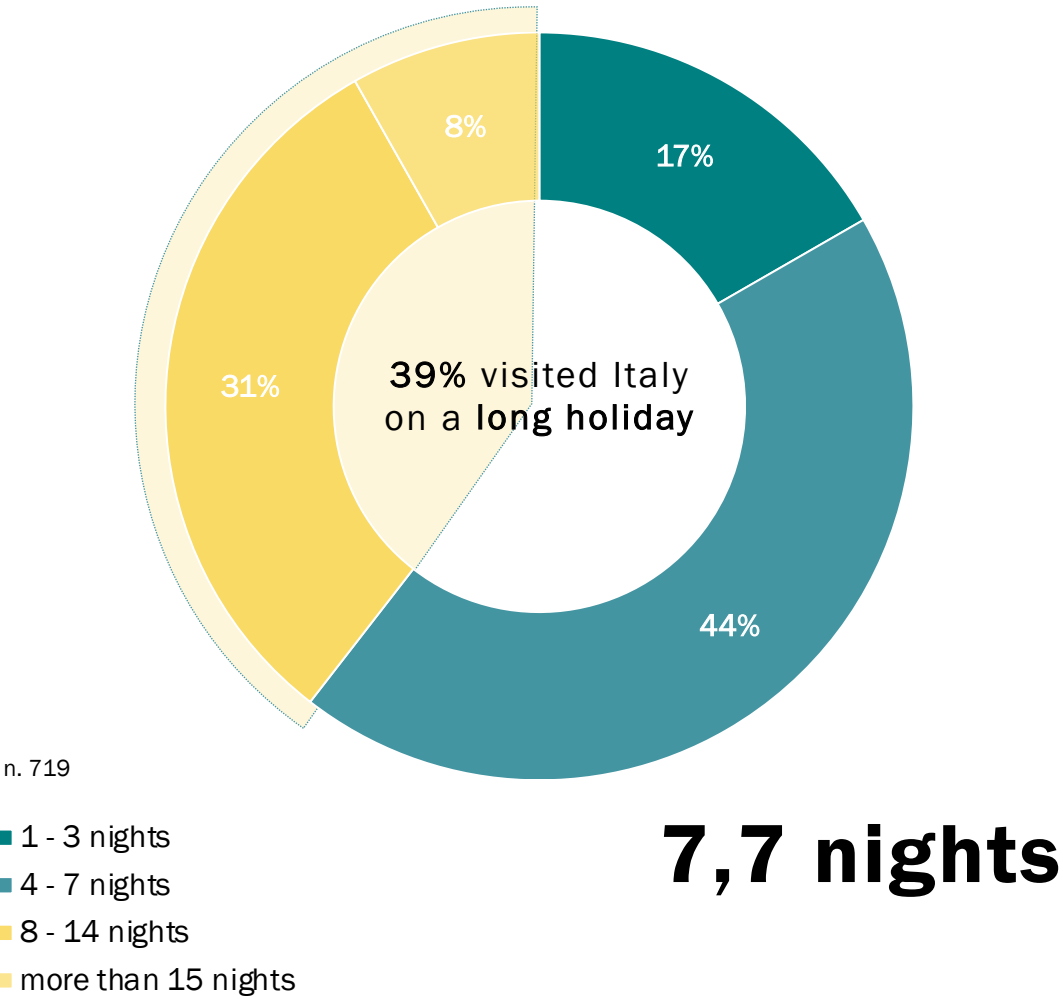
## Period



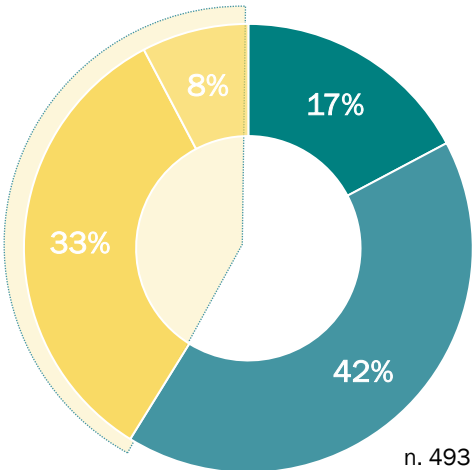
n. 719 | Respondents who have been on holiday in Italy at least once

# Holidays in Italy

## Length



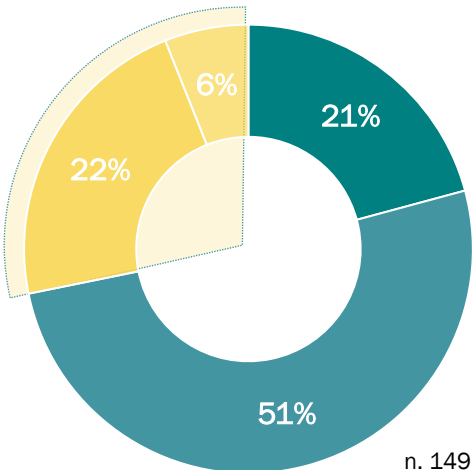
How many *nights* did you spend in Italy during your last holiday?



North America

**41%**  
Long holidays

**7,8 nights**  
Average length



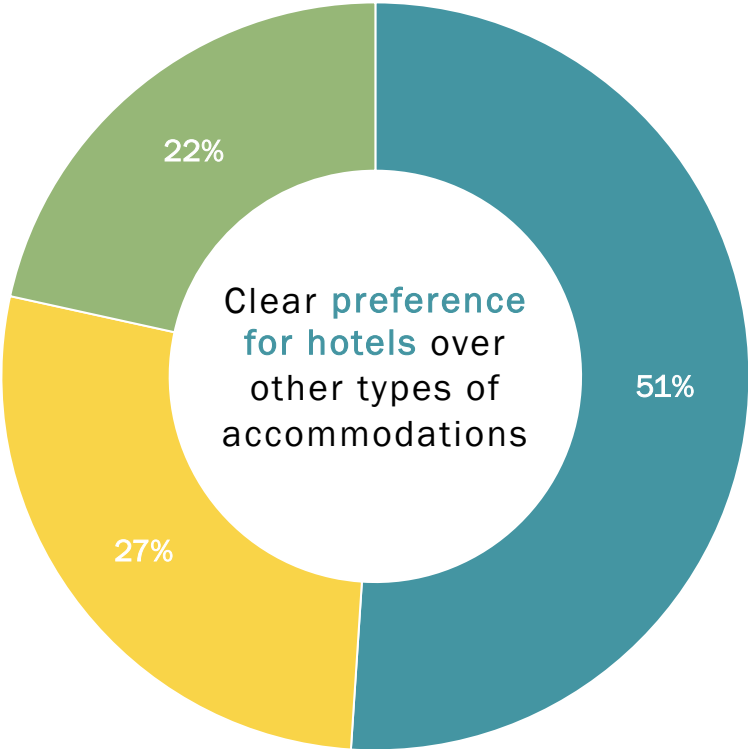
Europe

**28%**  
Long holidays

**7 nights**  
Average length

# Holidays in Italy

## Accommodation

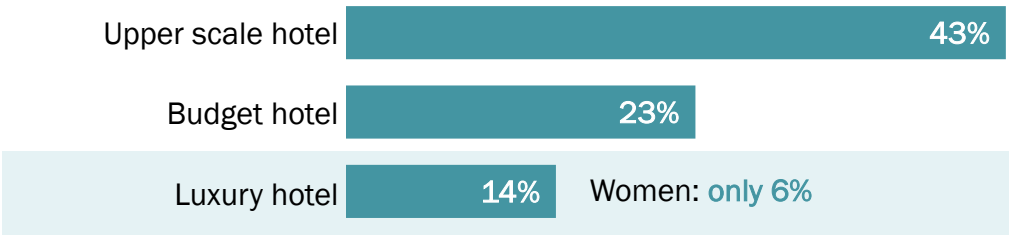


n. 719

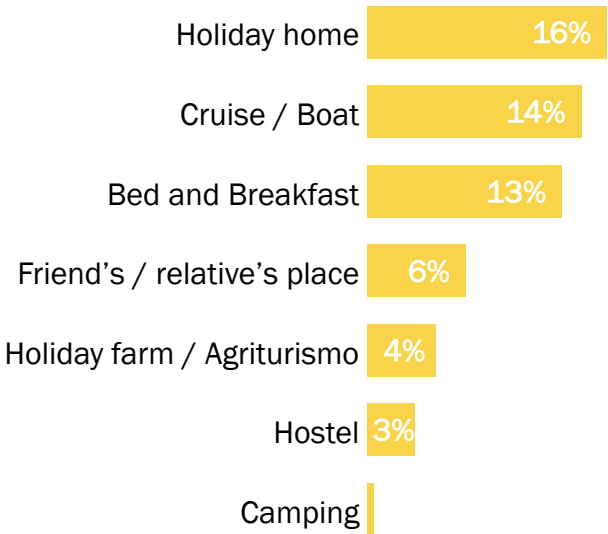
- Hotel (only)
- Extra hotel (only)
- Both (hotel and extra hotel)

Where did you stay during your last Italian holiday?

### Hotel



### Extra hotel



n. 719

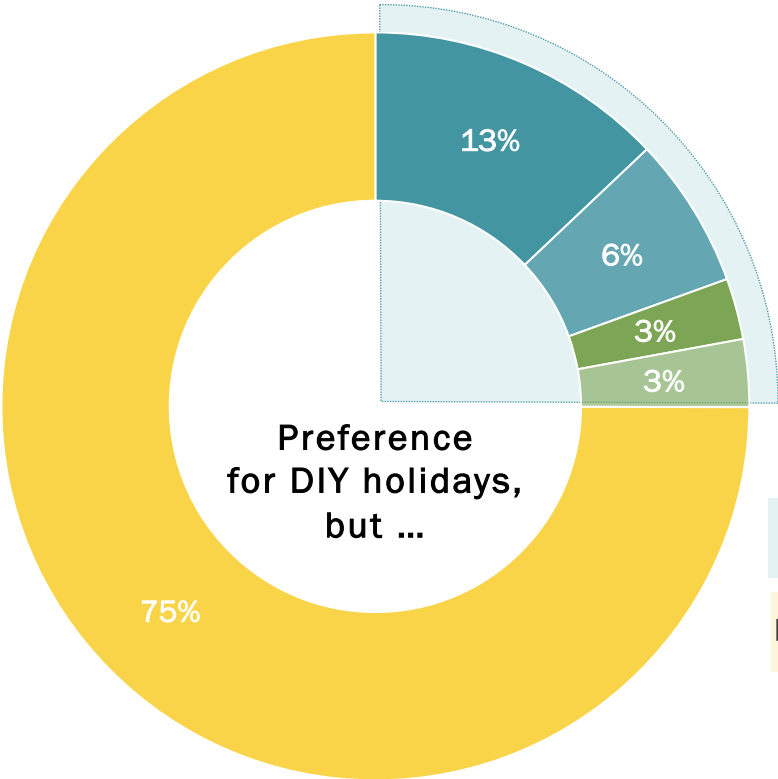


45%	36%
23%	20%
13%	13%
16%	14%
16%	6%
12%	13%
5%	9%
3%	7%
2%	3%
1%	-



# Holidays in Italy

How did you organize your last trip to Italy?

## Trip organization



25% of respondents (mainly non male, first timers and North American) organized their holiday to Italy through a travel agent / tour operator, but with no preference for specialized LGBTQ+ travel agents / tour operators (only 6%).

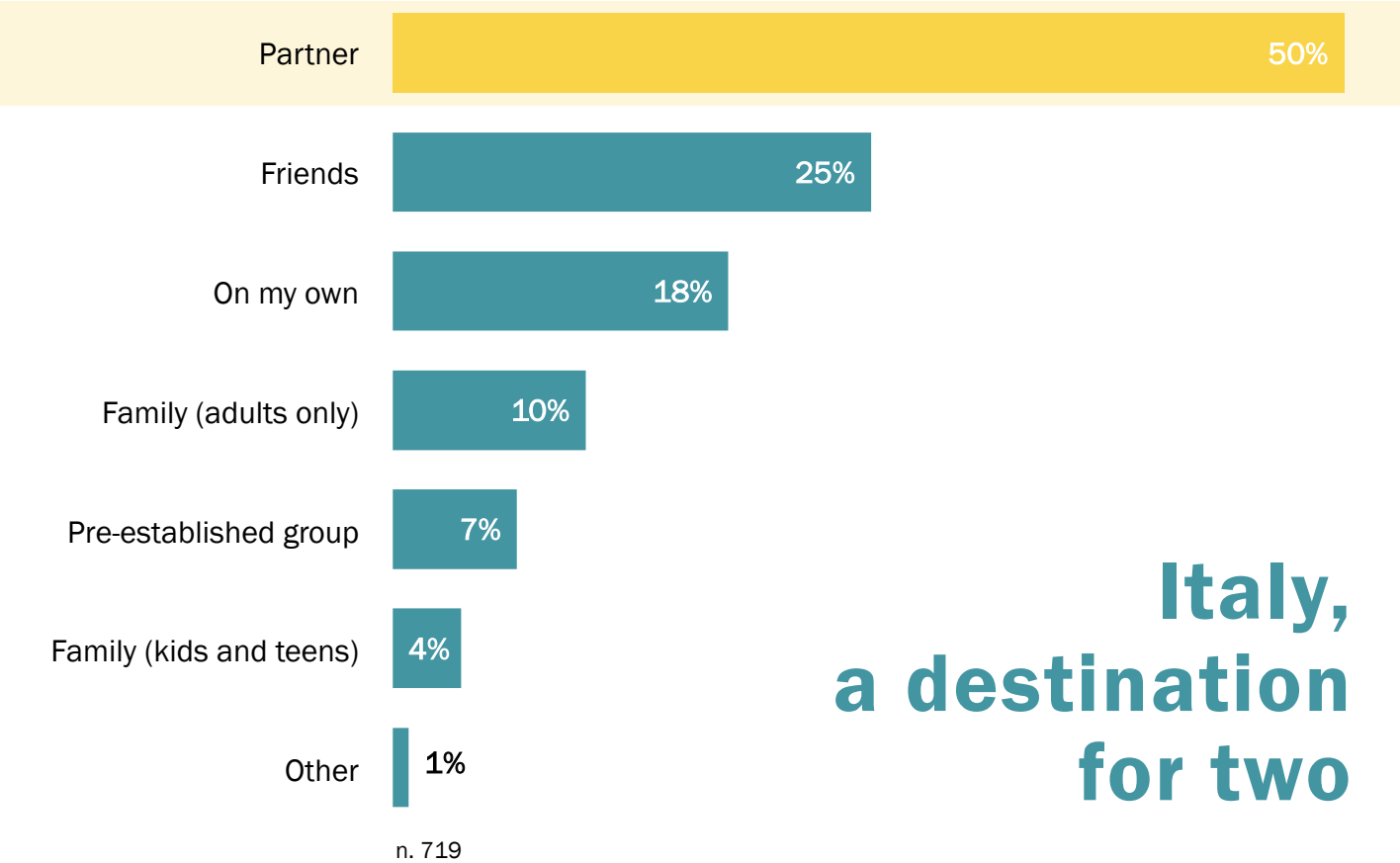
	Men	Women	Other	First timers	Repeaters		
Existing tour package or tailormade trip	18%	27%	29%	32%	15%	22%	11%
LGBTQ+ existing tour package or LGBTQ+ tailormade trip	6%	4%	6%	4%	6%	7%	1%
I bought an existing tour package or a tailormade trip	24%	31%	35%	36%	21%	29%	12%
I arranged everything by myself	76%	69%	65%	64%	79%	71%	88%

n. 719

- Existing tour package by a generalist Travel Agent / Tour Operator
- Tailormade trip by a generalist Travel Agent / Tour Operator
- Existing tour package designed for LGBTQ+ travelers
- Tailormade trip by an LGBTQ+ specialized Travel Agent / Tour Operator
- I arranged everything by myself



# Holidays in Italy

## Travel companions



Italy,  
a destination  
for two

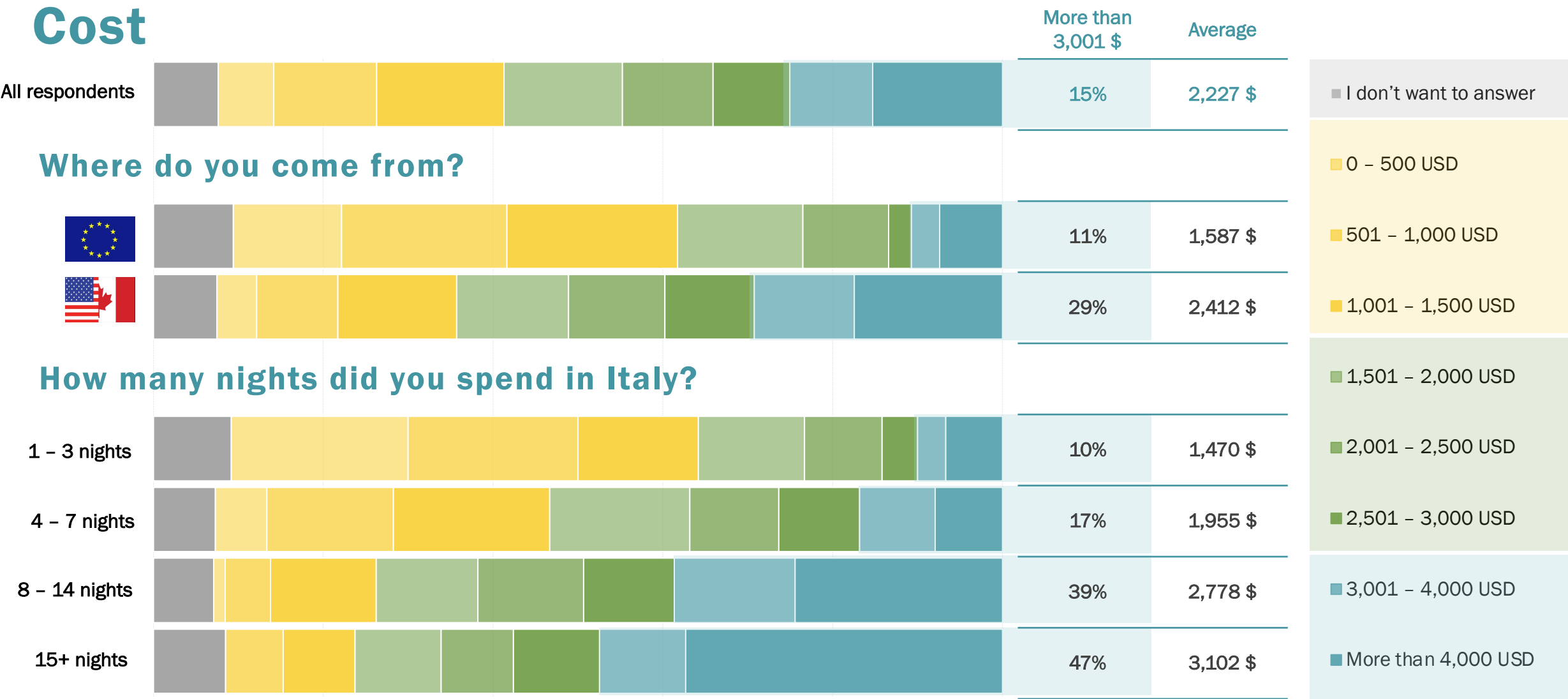
Whom did you travel with  
during your last holiday in Italy?

Men	Women	Other		
51%	46%	46%	50%	54%
26%	28%	11%	27%	21%
18%	15%	11%	17%	17%
9%	13%	20%	10%	10%
5%	13%	17%	8%	3%
3%	4%	6%	3%	3%
1%	-	3%	-	2%

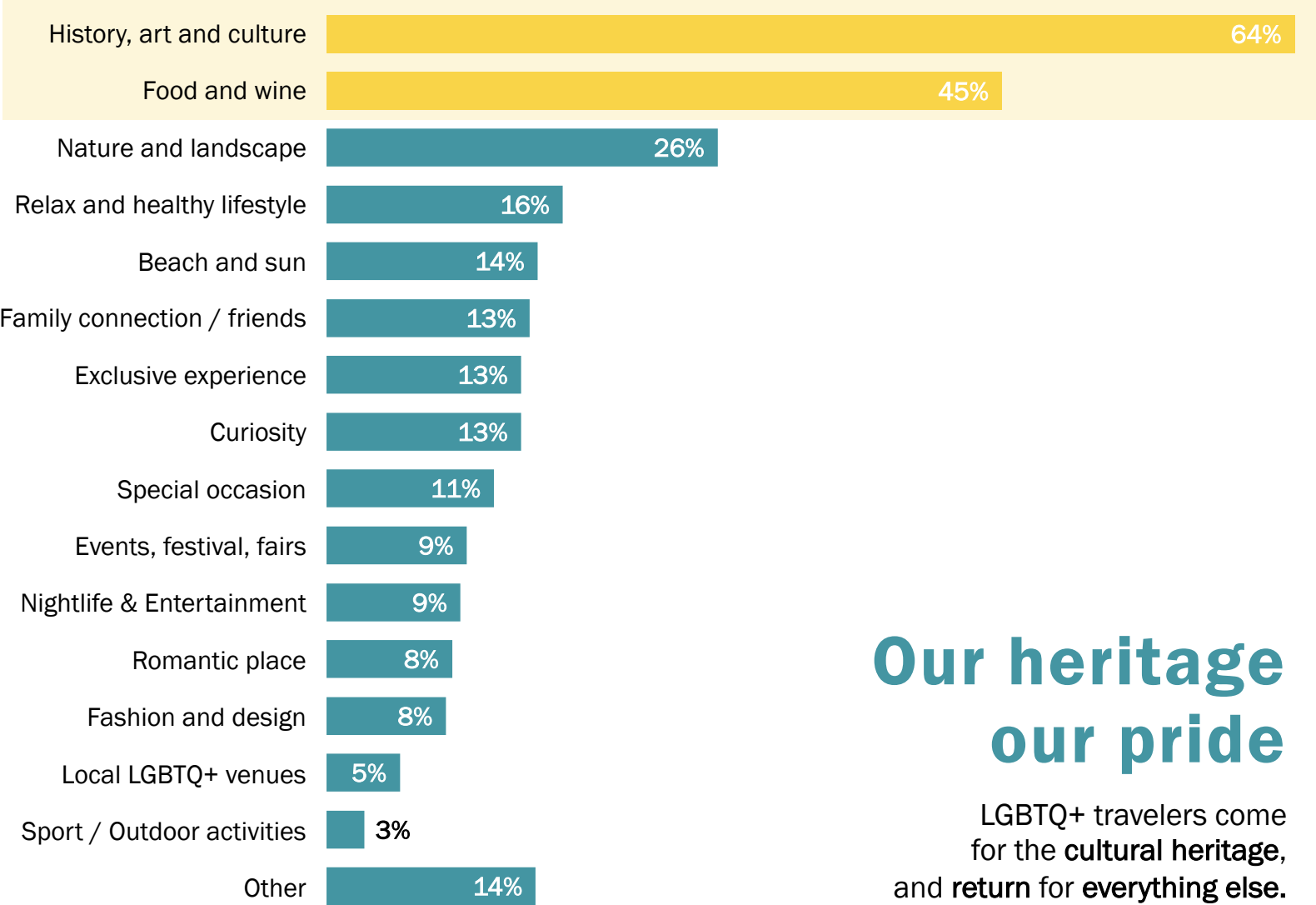
# Holidays in Italy

How much did you *pay* for your *Italian* vacation  
*NOT* including the cost for international transfers?

## Cost



# Holidays in Italy: reasons why





n. 719

## Our heritage our pride

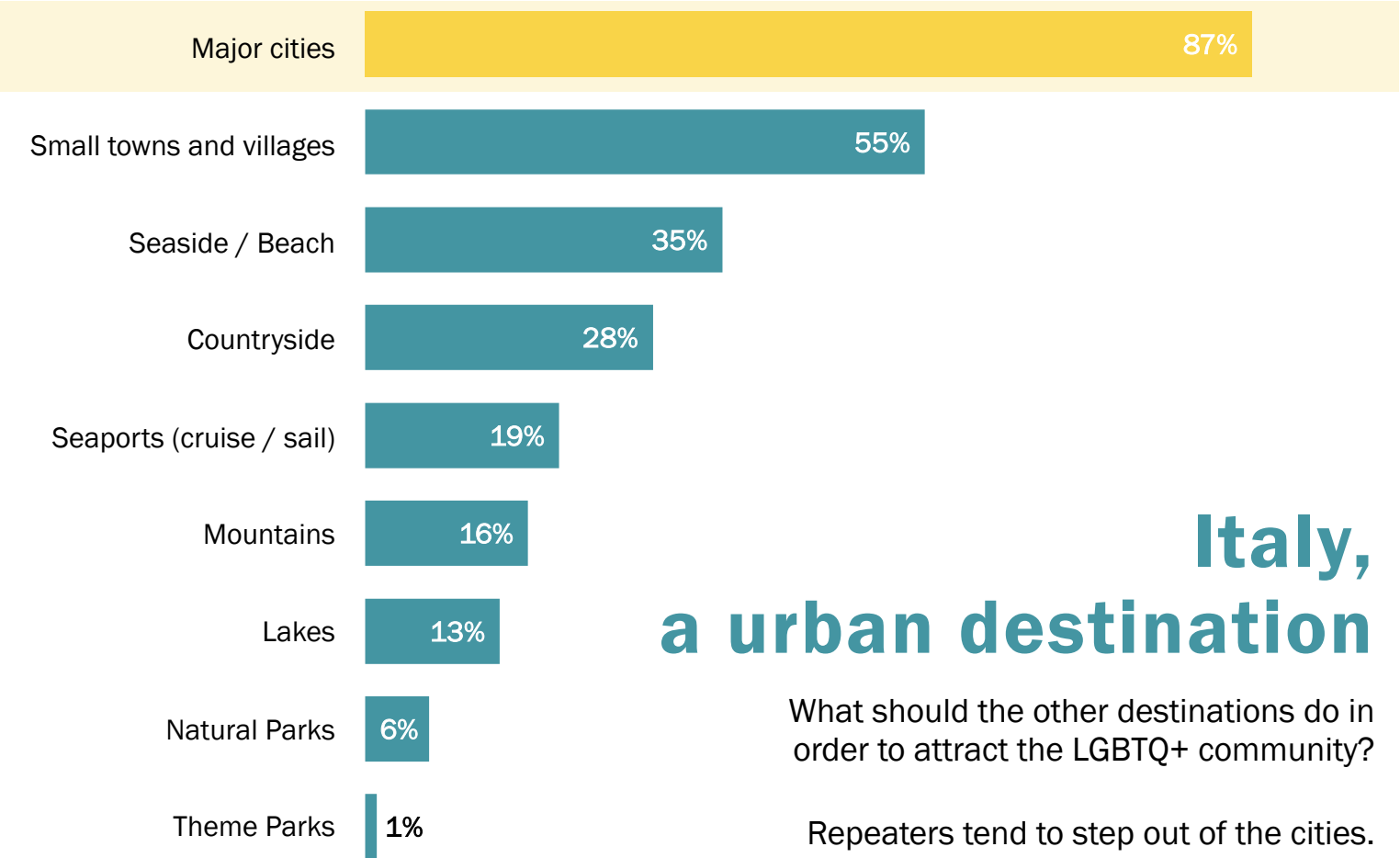
LGBTQ+ travelers come  
for the **cultural heritage**,  
and **return for everything else**.

Why did you last go to Italy on holiday?

First timers	Repeaters		
64%	65%	70%	46%
34%	49%	47%	39%
18%	29%	24%	32%
9%	18%	14%	19%
6%	17%	10%	26%
10%	15%	13%	17%
12%	13%	14%	8%
24%	9%	13%	13%
9%	12%	12%	8%
4%	11%	8%	9%
9%	9%	9%	10%
6%	9%	8%	10%
4%	9%	8%	6%
3%	5%	5%	4%
2%	3%	2%	6%
13%	14%	15%	11%

# Holidays in Italy

## Visited places (by type)





n. 719

### Italy, a urban destination

What should the other destinations do in order to attract the LGBTQ+ community?

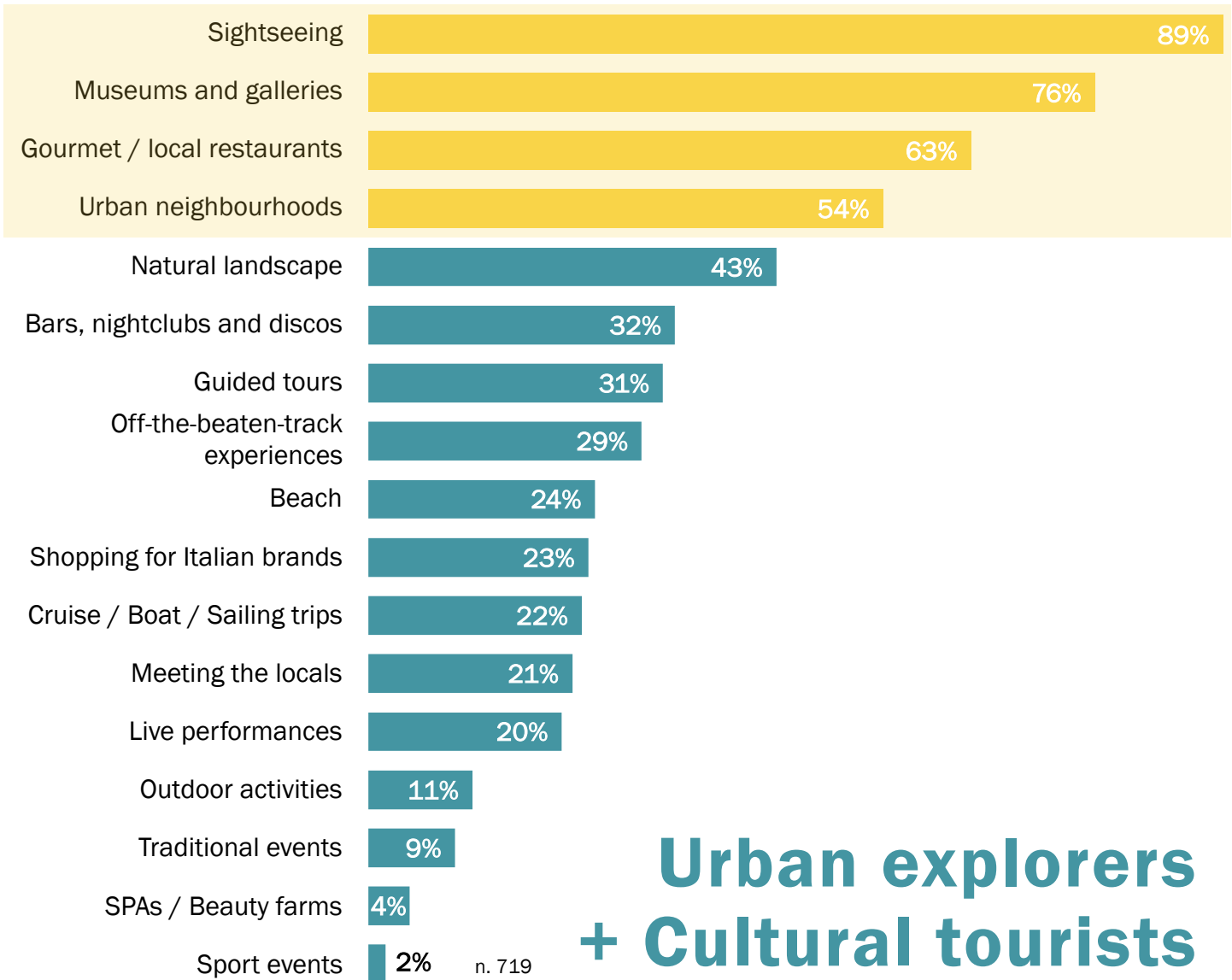
Repeaters tend to step out of the cities.

What type of places did you visit during your last holiday in Italy?

		 	
First timers	Repeaters		
90%	86%	91%	72%
40%	60%	57%	48%
21%	40%	32%	42%
20%	31%	29%	28%
15%	20%	21%	11%
12%	17%	14%	22%
7%	15%	12%	16%
5%	7%	5%	11%
1%	1%	-	3%





# Holidays in Italy: activities



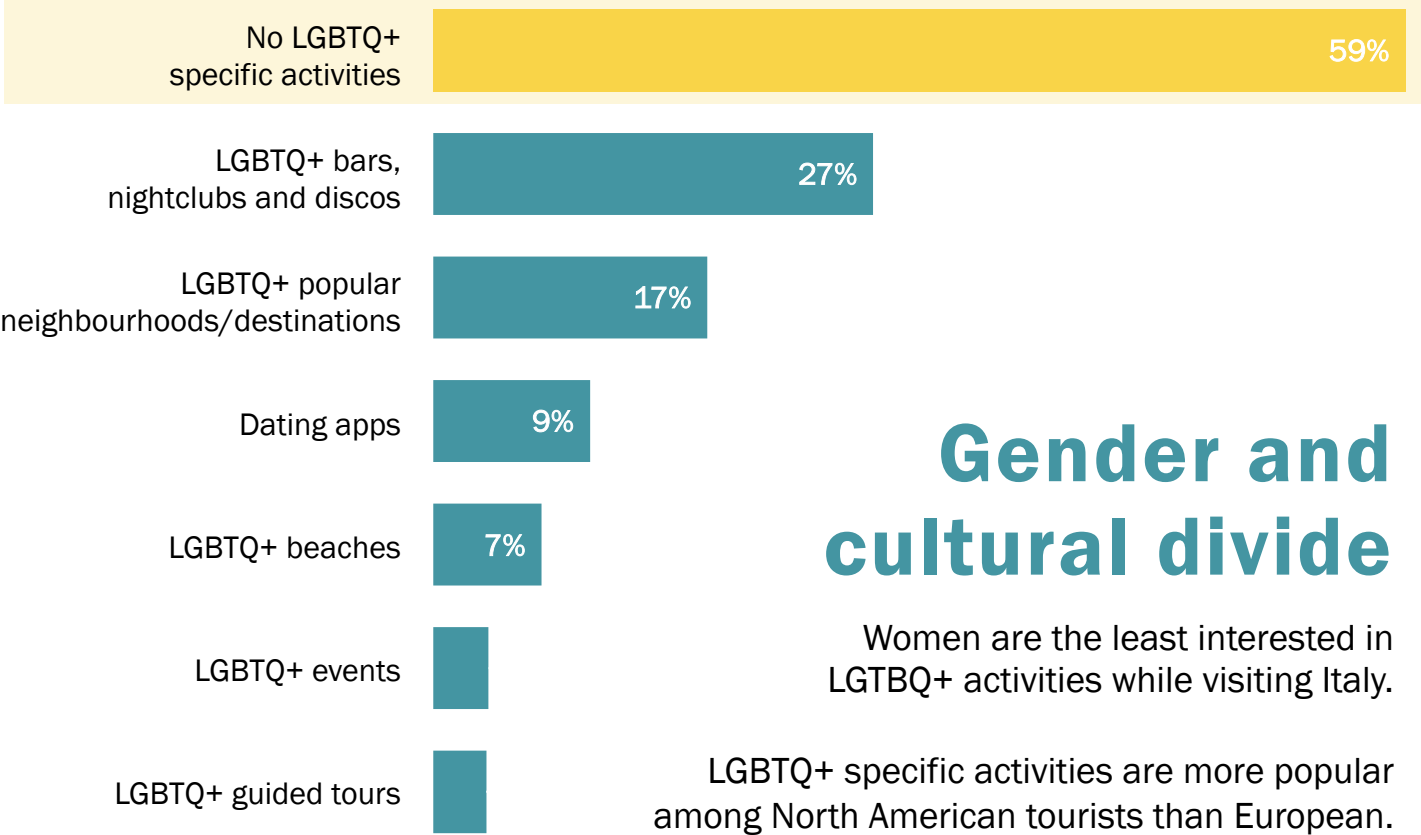
**Urban explorers  
+ Cultural tourists**

What did you do during your Italian holiday?

Men	Women	Other		
90%	85%	83%	93%	76%
76%	80%	69%	82%	54%
64%	63%	46%	66%	58%
54%	59%	43%	58%	41%
42%	46%	40%	42%	45%
33%	22%	20%	34%	30%
31%	31%	17%	37%	14%
30%	15%	31%	34%	12%
24%	20%	20%	20%	34%
23%	20%	23%	25%	11%
23%	19%	17%	23%	19%
22%	11%	26%	25%	7%
20%	19%	20%	21%	16%
12%	4%	6%	12%	11%
9%	6%	11%	9%	8%
4%	7%	9%	3%	10%
2%	-	6%	2%	2%

# Holidays in Italy

## LGBTQ+ activities





n. 719

### Gender and cultural divide

Women are the least interested in LGBTQ+ activities while visiting Italy.

LGBTQ+ specific activities are more popular among North American tourists than European.

Did you do any LGBTQ+ specific activity during your Italian holiday?

Men	Women	Other		
57%	74%	63%	60%	55%
28%	15%	23%	28%	21%
17%	13%	11%	19%	11%
10%	2%	6%	7%	19%
7%	-	9%	6%	8%
3%	2%	9%	2%	6%
3%	4%	3%	3%	2%

# Holidays in Italy

How *satisfied* were you with your overall holiday experience in Italy?  
How *likely* is it that you would *recommend* a holiday in Italy to a friend?

## Performance

The **performance** of the holiday experience in Italy has been measured according to **three indicators**:

1

**Average satisfaction** is the average of the answers to the question «*How satisfied were you with your overall experience in Italy?*» on a scale of 1 (Not at all satisfied) to 10 (Very satisfied).



2

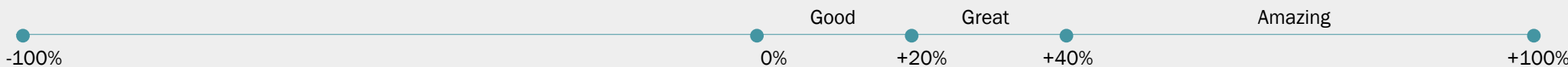
**Average recommendation** is the average of the answers to the question «*How likely is it that you would recommend a holiday in Italy to a friend?*» on a scale of 0 (Absolutely no) to 10 (Absolutely yes).



3

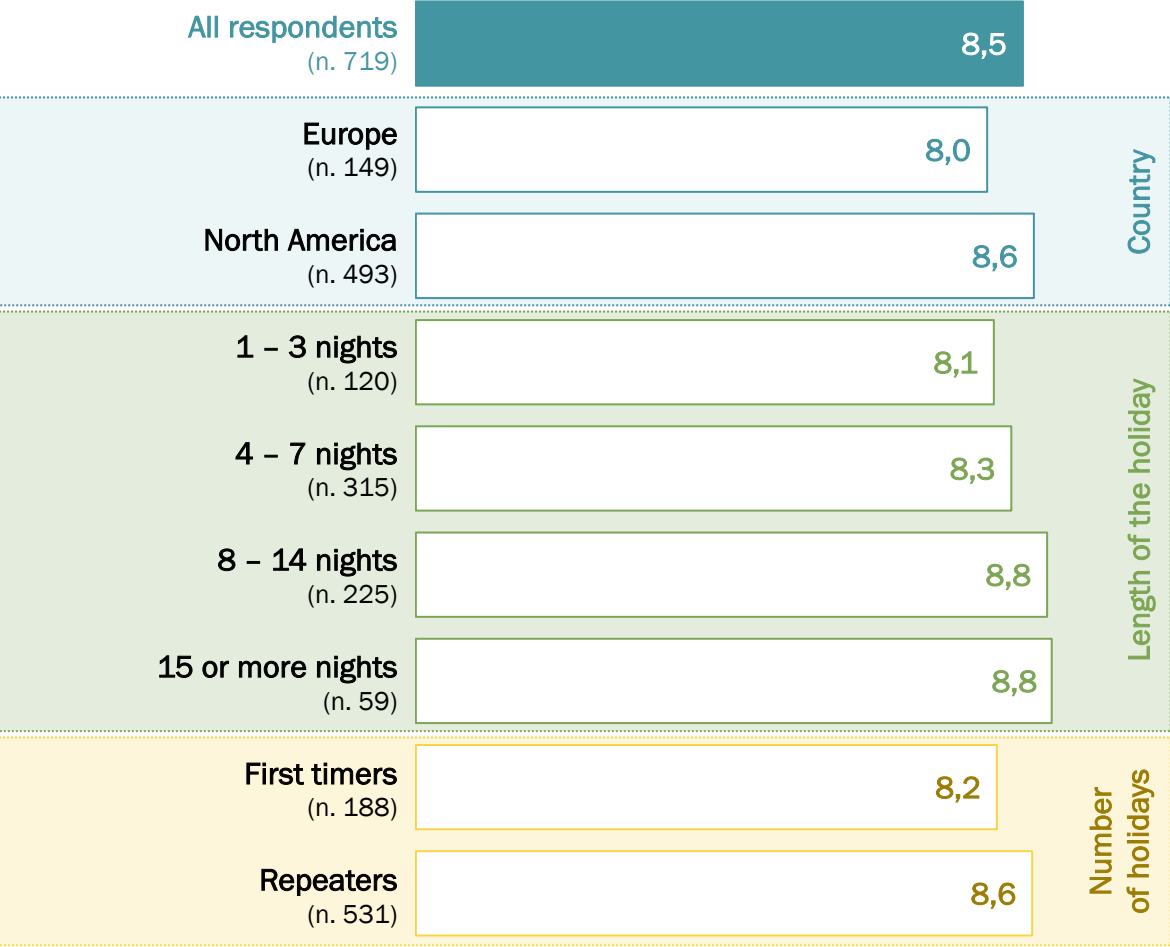
**Net Promoter Score (NPS)** is the difference between the percentage of promoters and the percentage of detractors of a holiday in Italy.

**Promoters** are those who would recommend a holiday in Italy to a friend with 9-10 answers while **detractors** are those who would «recommend» a holiday in Italy with 0-6 answers.



# Holidays in Italy

## Satisfaction



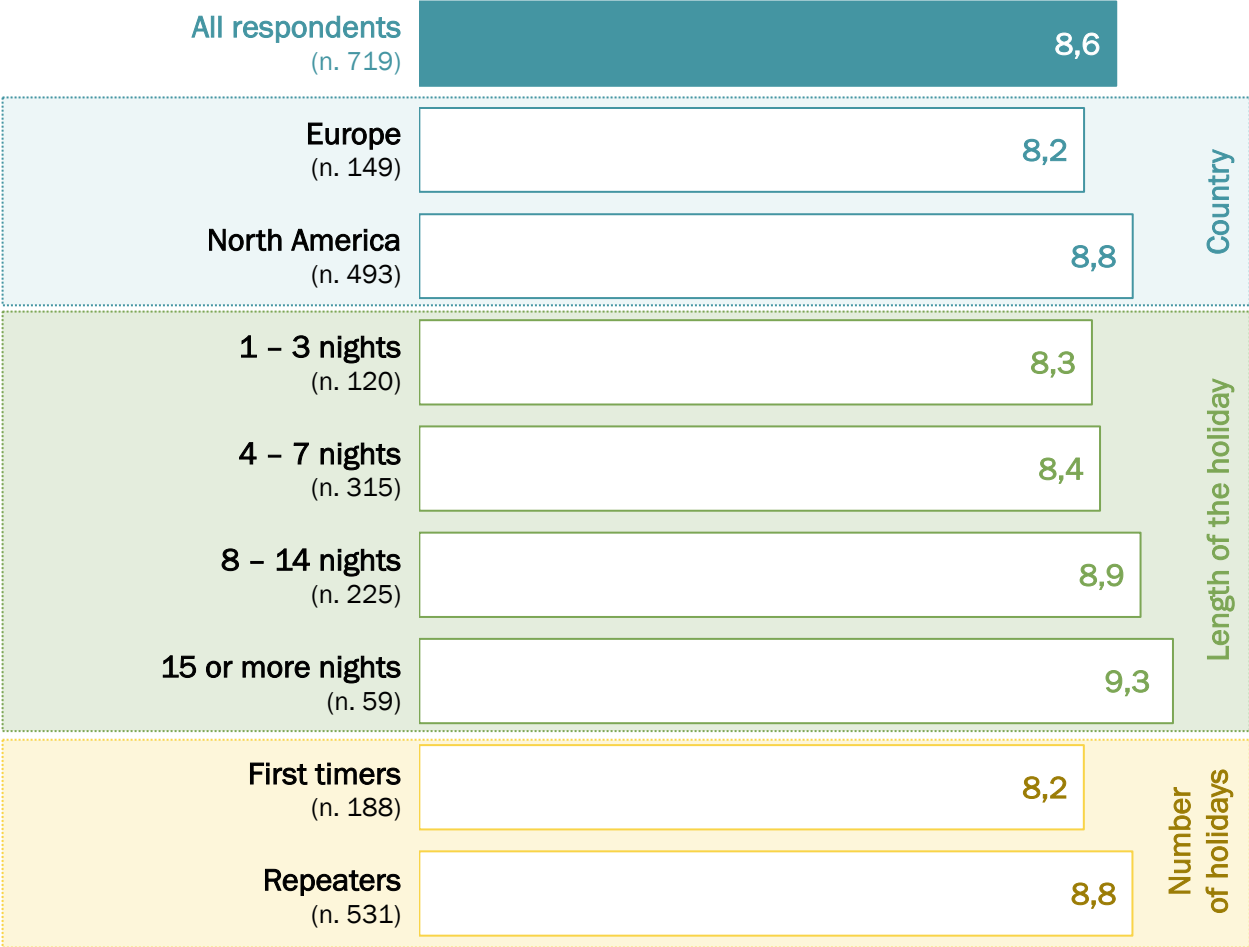
n. 719

1 Not at all satisfied

Very satisfied 10

How *satisfied* were you with your overall holiday experience in Italy?  
How likely is it that you would *recommend* a holiday in Italy to a friend?

## Recommendation



n. 719

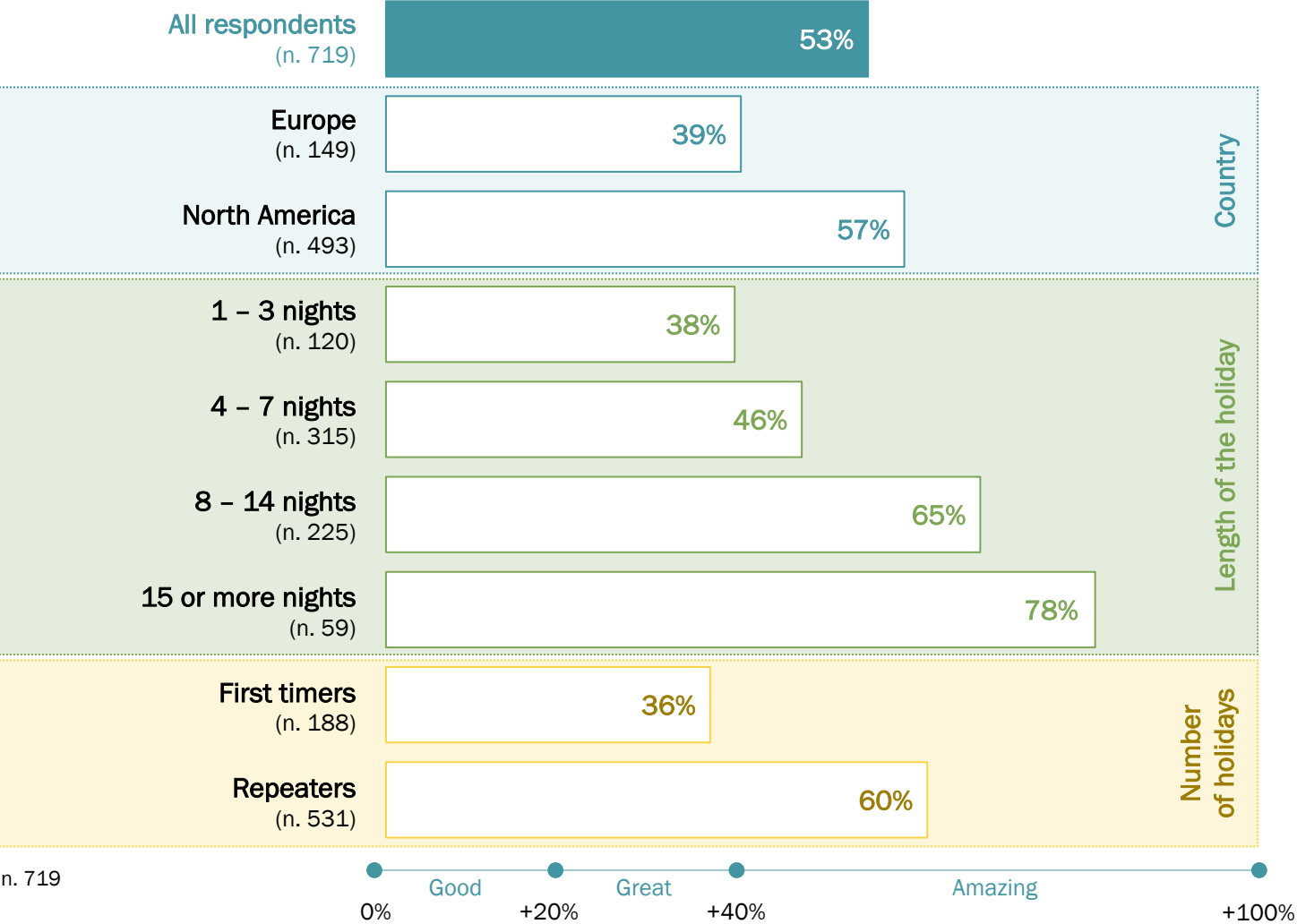
0 Absolutely no

Absolutely yes 10

# Holidays in Italy

How likely is it that you would recommend a holiday in Italy to a friend?

## Net Promoter Score



Developed by



**AITGL**  
ENTE NAZIONALE TURISMO LGBTQ+

In partnership with



**IGLTA**  
ADVANCING  
LGBTQ+ TRAVEL

# Thank you!

**Marianna di Salle**

Coordinator I Master in Tourism Economics and Management  
Bocconi University