

## 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.



## 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 attracts a significantly greater number of gay and bisexual men than lesbian and bisexual women. The same is true for other European countries.
- › Britain's LGBTQ visitors are reasonably equal by generation.
- › 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
<b>Great Britain</b>	<b>6.5%</b>	<b>8.4%</b>	<b>5.1%</b>	<b>2.9%</b>	<b>6.2%</b>	<b>6.5%</b>	<b>6.9%</b>	<b>7.3%</b>
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%
<b>Great Britain</b>	<b>6.1%</b>	<b>6.8%</b>	<b>5.4%</b>	<b>6.5%</b>	<b>5.8%</b>	<b>6.0%</b>
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%
<b>Great Britain</b>	<b>6.5%</b>	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%
<b>Great Britain</b>	<b>6.1%</b>	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).

This project had a **targeted invitation methodology focusing on known or probable LGBTQ international travelers** from CMI's research panel.

Potential participants that did not have international travel history in the past three years, and do not plan to travel internationally for the next three years were 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

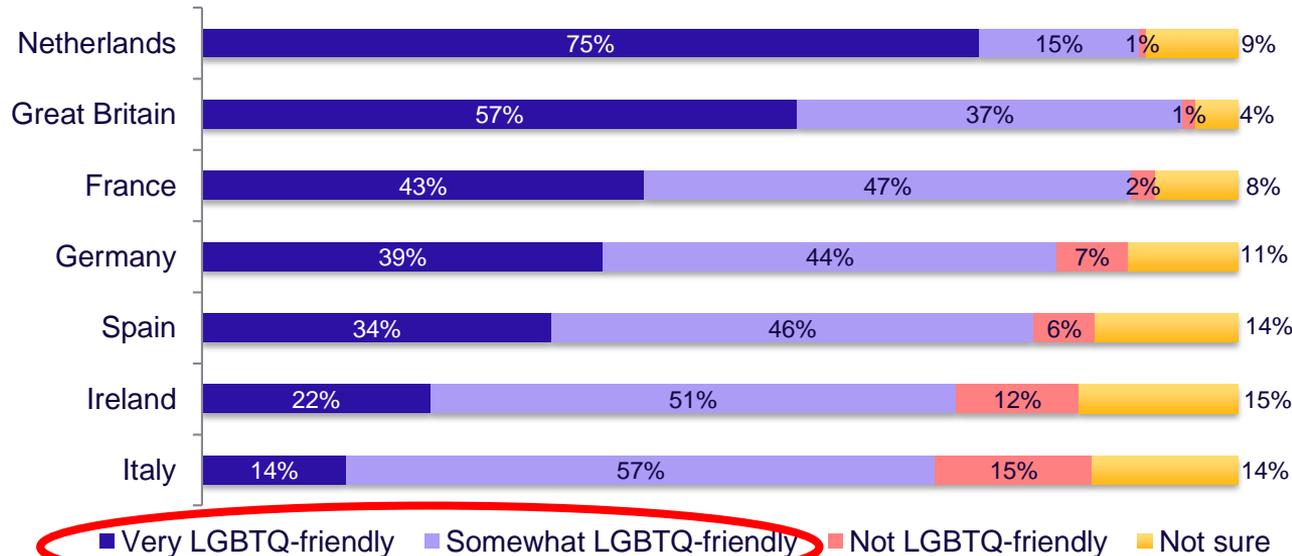
# Britain and Its Competitor Set

LGBTQ Market Intelligence Report



**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%).

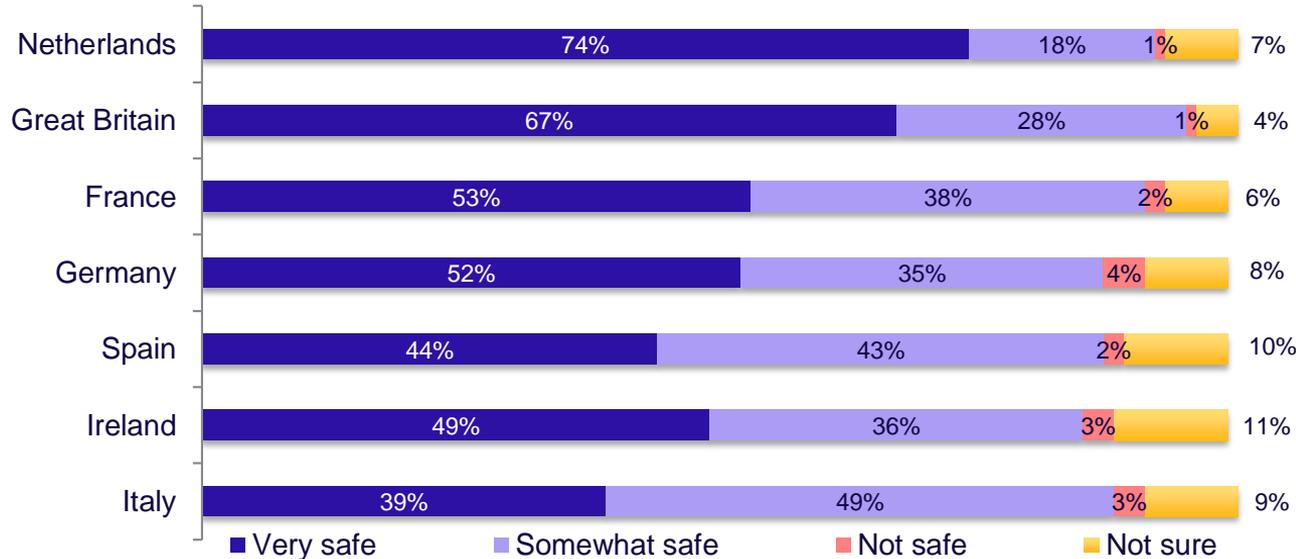
**When you think about these European travel destinations, which do you consider an LGBTQ-welcoming place for travel?**



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. For very safe, Britain compares well (67%) compared to the average of the competing destinations (52%).

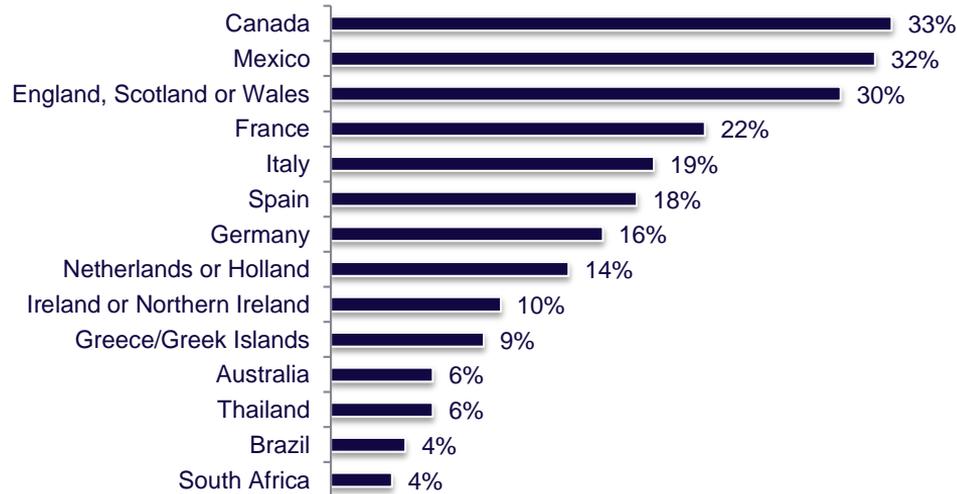
**As an LGBTQ traveler, how safe do you consider these European travel destinations to be?**



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.

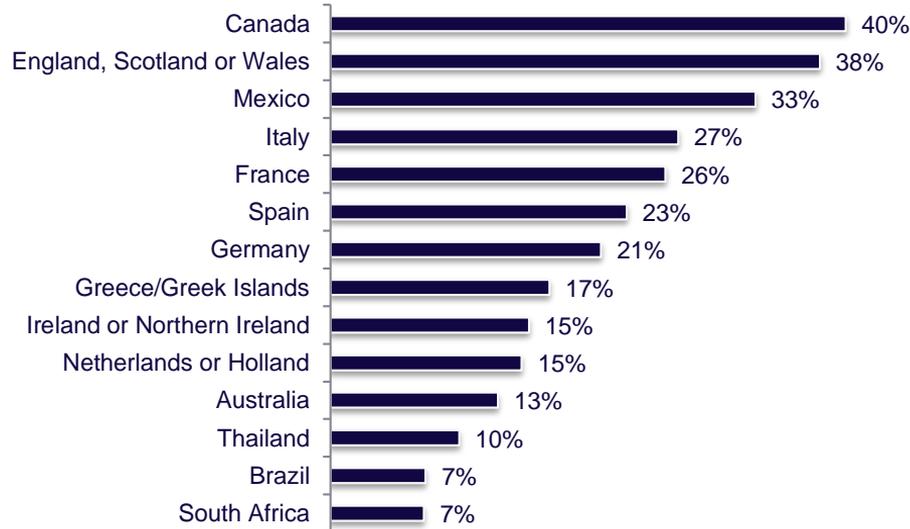
**Have you visited any of these travel destinations in the past three years, for vacation or leisure travel?**  
**All Participants**



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**



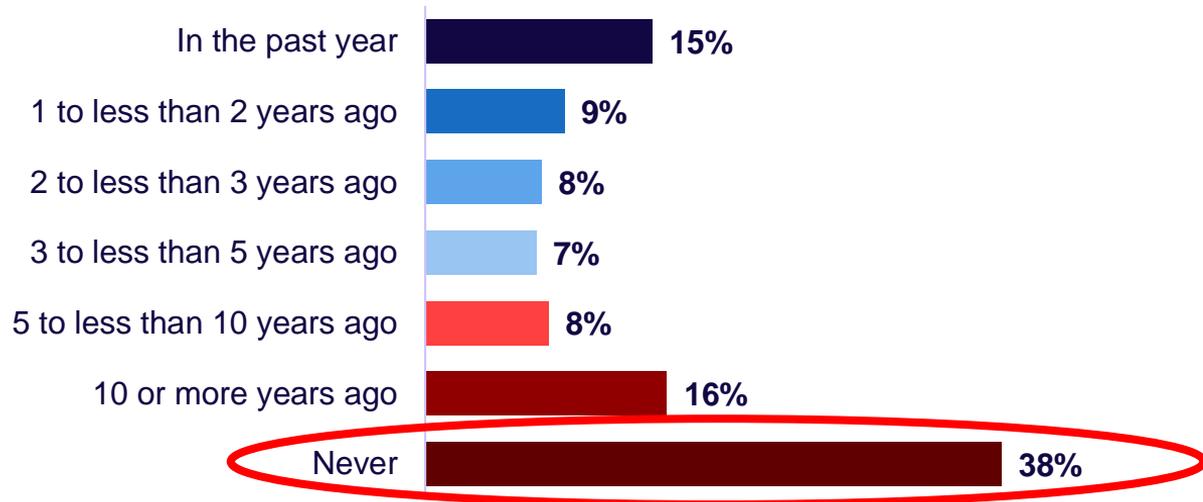
**The same question was asked of visitors.  
The top 4 reasons for visitors were:**

- 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?**

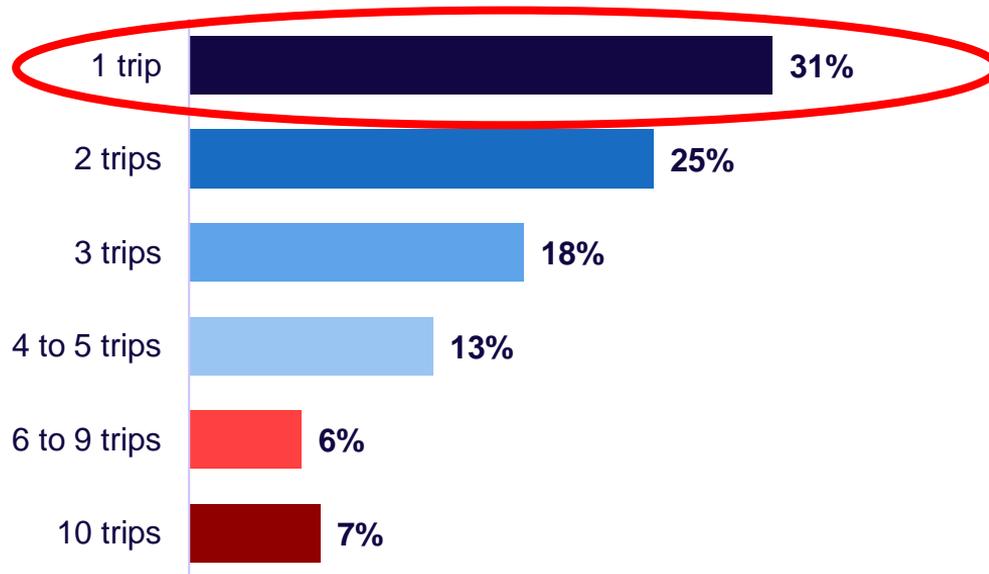
**All USA Participants**



**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**



## Britain and Its Competitor Set

### 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.
- Britain is likely to be advertising to LGBTQ readers who have already been to Britain. That may change promotional approaches.
- 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.
- The major barriers to LGBTQ visitation
  1. Expense
  2. Competition from other destinations
  3. Many have already visited (been there, done that)
  4. More education may be needed as participants seemed too London-focused
  5. Assumptions: Britain is too culturally similar to home. Britain has bad weather



VisitBritain®



United States Results

# Understanding LGBTQ Travel Patterns to Britain

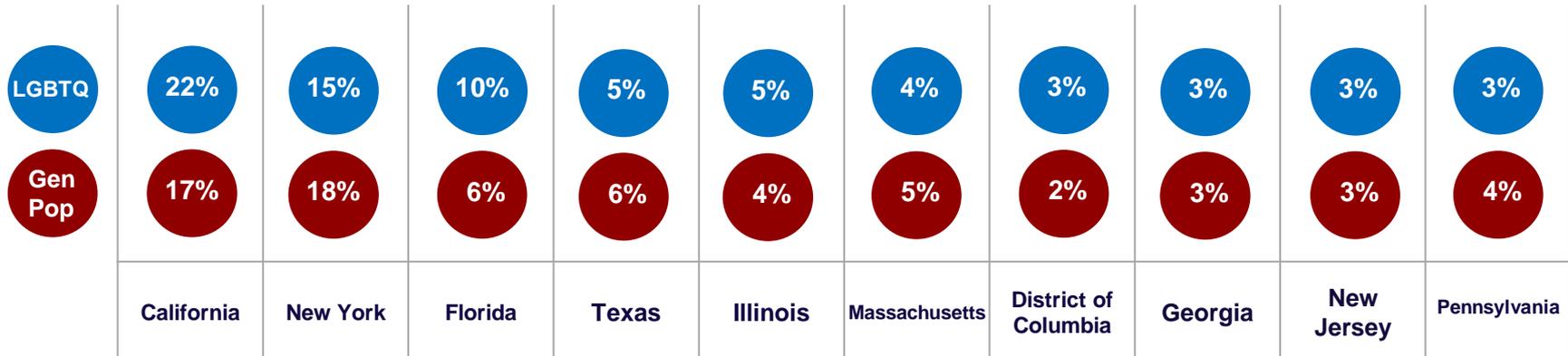
LGBTQ Market Intelligence Report





**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



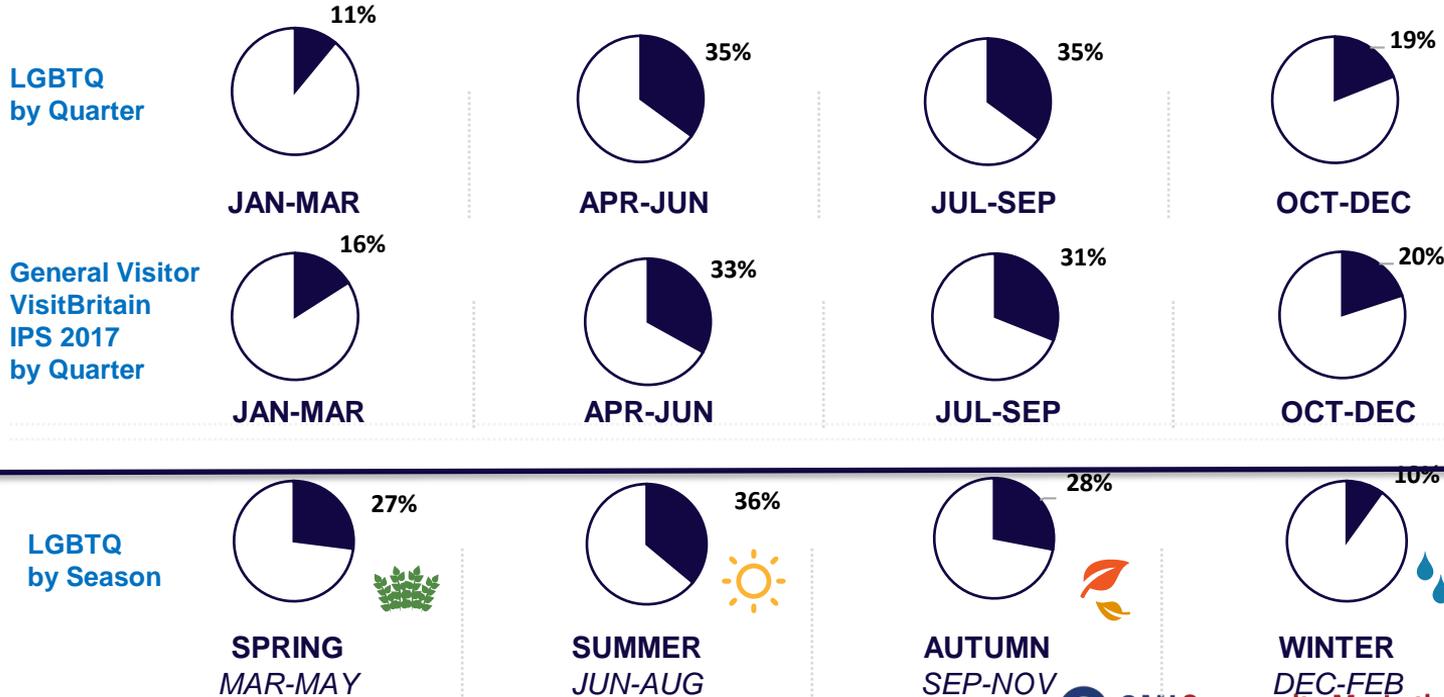
**Reason for Visit:** While participants visited Britain mainly for leisure, visiting friends and business reasons were not insignificant. For British leisure travelers, visiting an LGBTQ or straight friend was 23%, making the combined percentage higher than business travel.

**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?



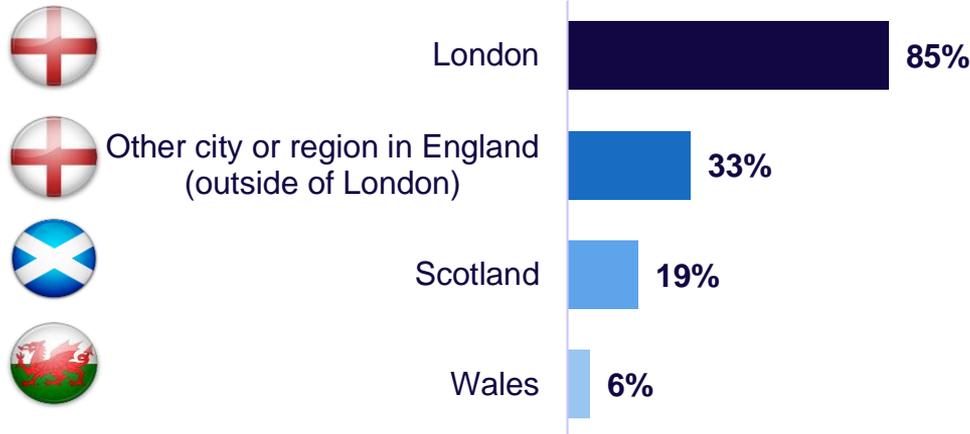
Base: Unweighted USA Britain LGBTQ Visitors n=549, General population data based on 3,910,000 visitors

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/Lock 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%



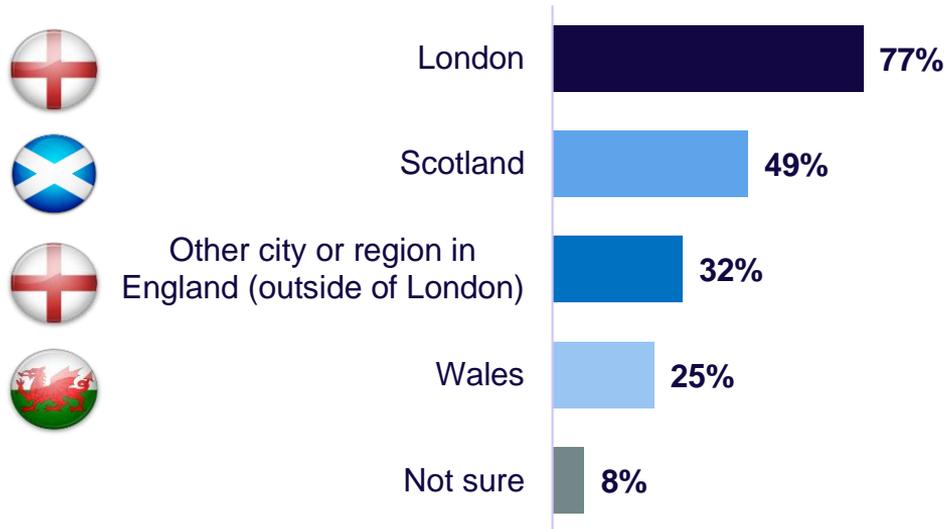
Wales Destinations	# of Travelers	% of all Britain Visitors
Cardiff	18	3%
Pembrokeshire	5	1%
Swansea	5	1%
Snowdonia	4	1%
Other region in Wales	8	1%

**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 LGBTQ Travel Patterns to Britain

### 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.
- 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.



VisitBritain®



United States Results

# Understanding Diversity of LGBTQ Visitors

LGBTQ Market Intelligence Report



**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

<b>37%</b>	<b>44%</b>	<b>48%</b>	<b>31%</b>	<b>26%</b>	<b>25%</b>
<b>Male 18-34</b>	<b>Male 35 to 54</b>	<b>Male 55+</b>	<b>Female 18-34</b>	<b>Female 35 to 54</b>	<b>Female 55+</b>
<b>88 Visitors</b>	<b>139 Visitors</b>	<b>135 Visitors</b>	<b>69 Visitors</b>	<b>60 Visitors</b>	<b>43 Visitors</b>
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.
- 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.

## Understanding Diversity of LGBTQ Visitors

### 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... gay men, or, attempt to boost market share from a lagging market...lesbians. If a lesbian strategy is desired, VisitBritain must commit. From CMI's experience, 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.
- Many corporations have realized that outreach strategies that include the transgender community are very important for their LGBTQ reputation. 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 if it decides to be more proactive in the women's and transgender markets, it does not result in a reduction in energy for the successful men's market.



United States Results

# Top LGBTQ Motivators to Visit Britain

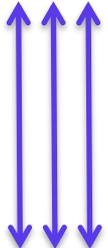
LGBTQ Market Intelligence Report



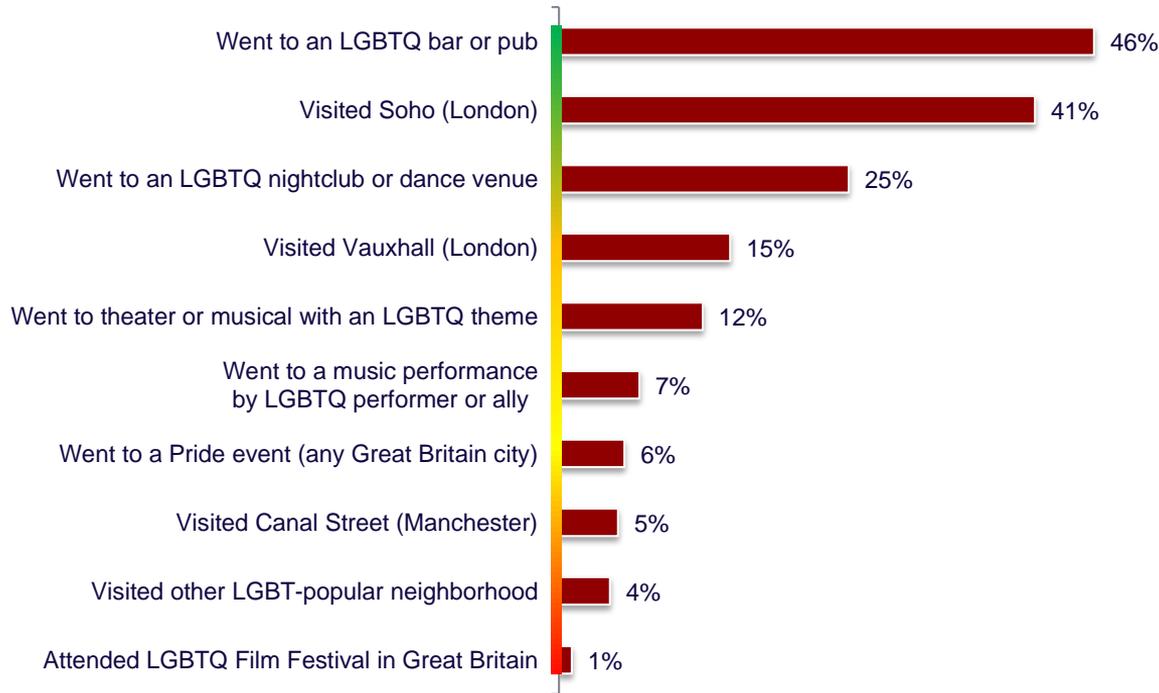
## Britain Visitors: What did you do on your most recent visit to Great Britain?



**Range for Next  
LGBTQ  
Question**



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



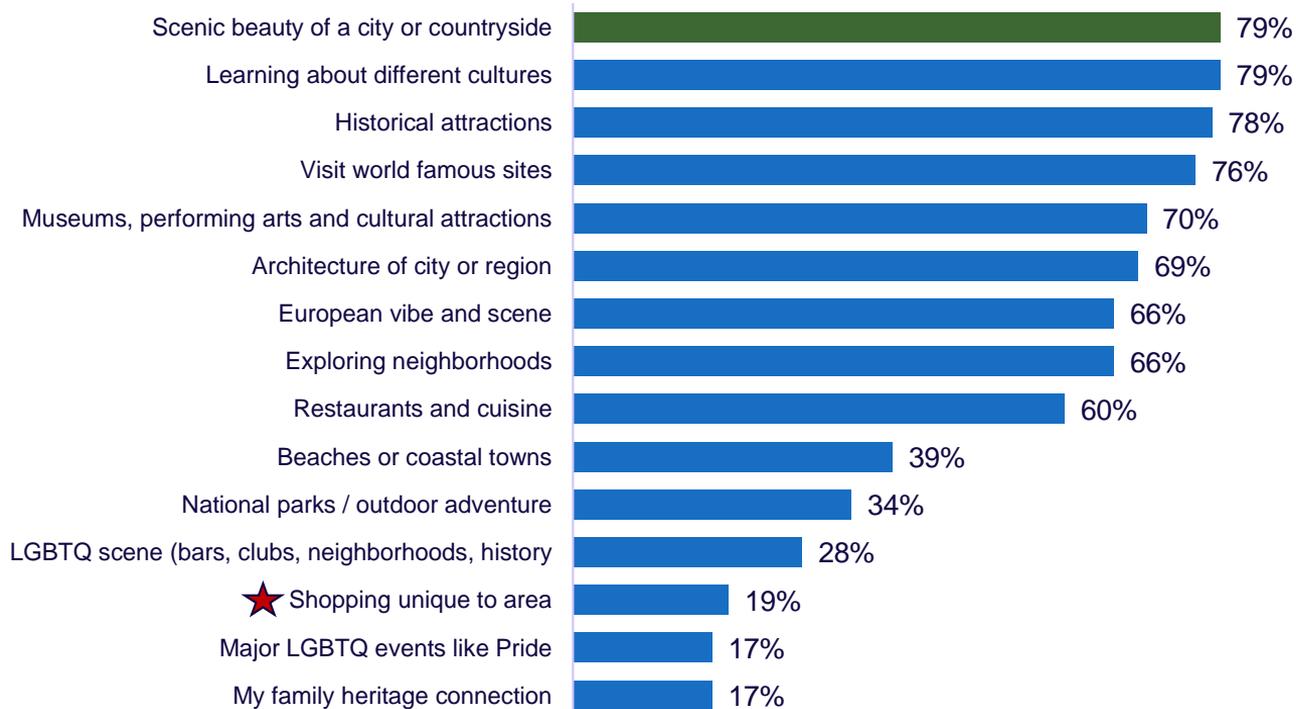
### Demographic Notes

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

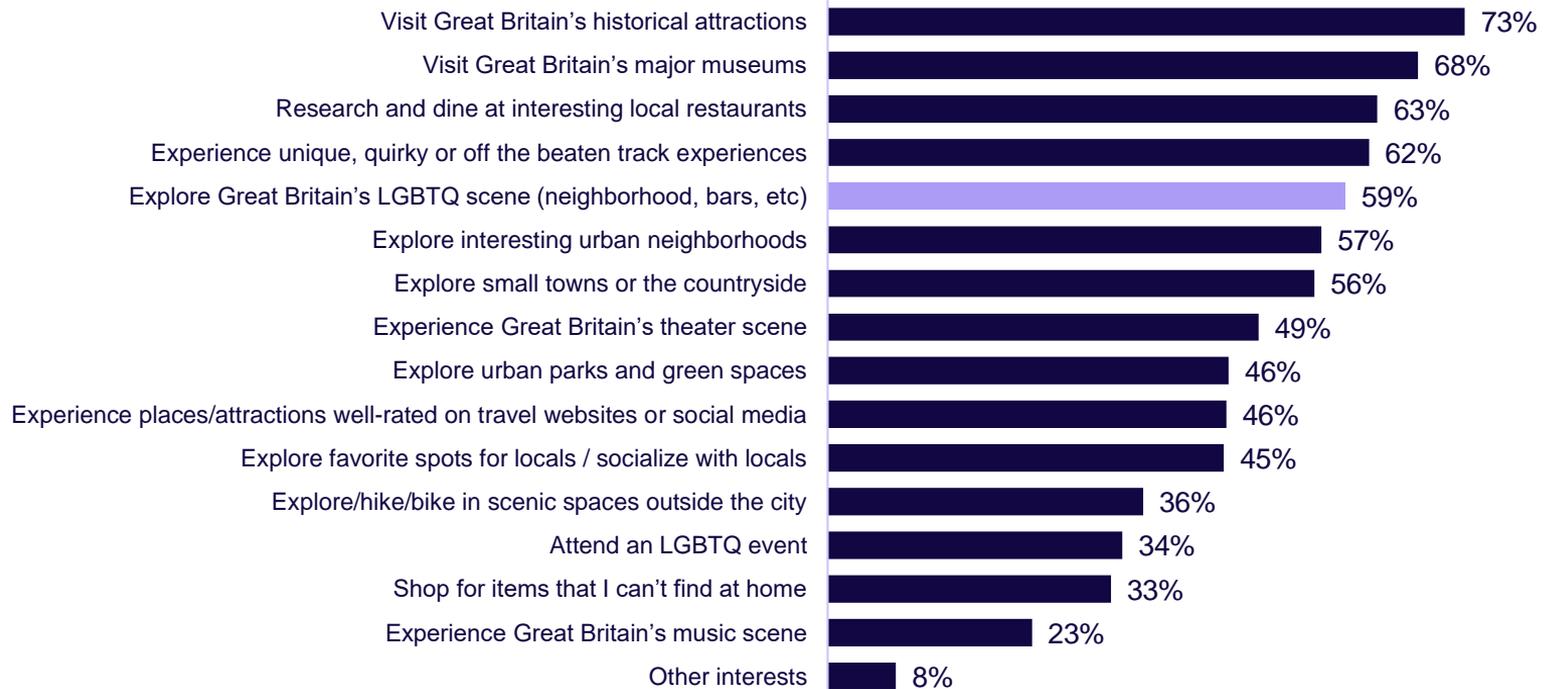
48% of **gay and bisexual men** visited Soho compared to 26% of women (includes non-London visitors)

When you think about a vacation to Europe, what motivates you the most to potentially book a trip?

Among Britain Visitors



Which of these activities interest you the most to consider booking your first or a repeat visit to Great Britain?  
 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%	53%	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%

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%

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%

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%

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%

**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%



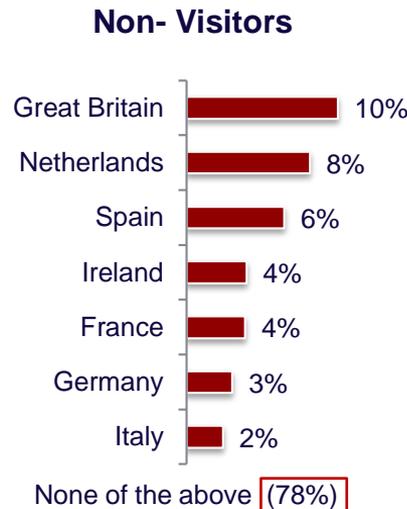
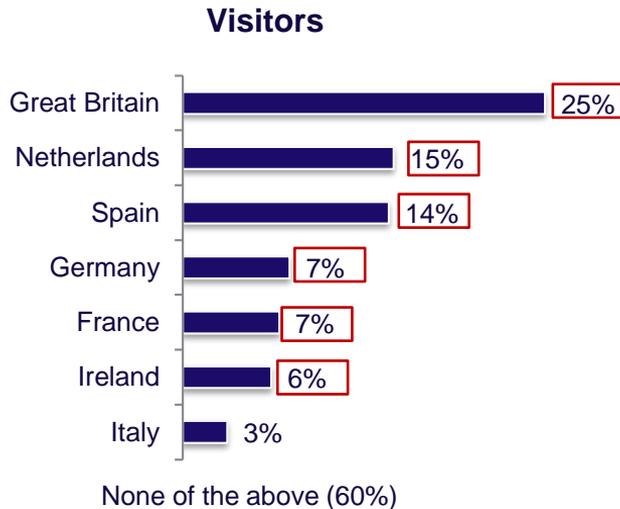
# Communicating with the LGBTQ Community

LGBTQ Market Intelligence Report



**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%

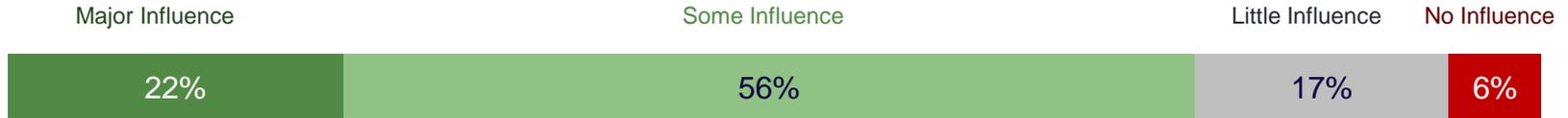
**Level of LGBTQ in Outreach:** The vast majority of participants want VisitBritain to produce a campaign that combines LGBTQ-specific and general imagery/information. Only 13% of visitors support a campaign emphasizing just general imagery/information.

**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 <b>LGBTQ-specific imagery/information</b>	15%	13%	14%	12%	16%	15%	9%
A campaign that <b>combines LGBTQ-specific and general imagery/information</b>	72%	75%	71%	77%	76%	73%	72%
A campaign emphasizing <b>general imagery/information</b>	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?





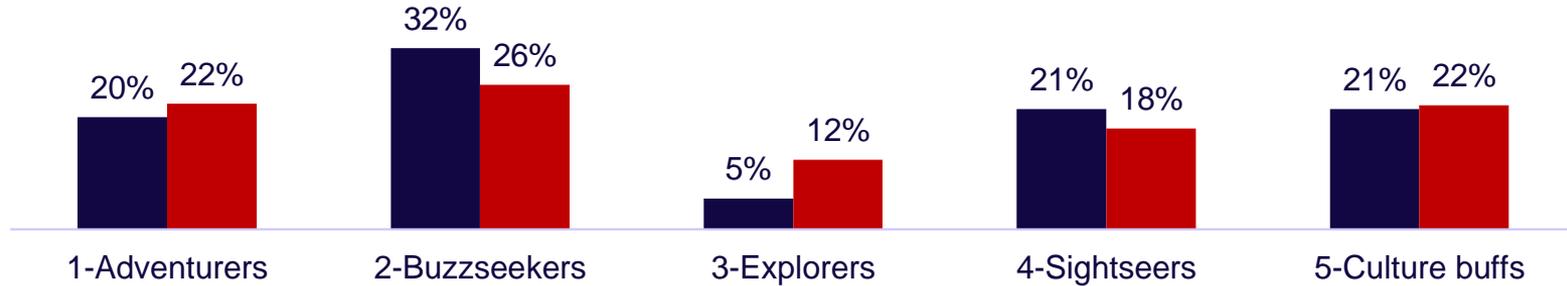
## Have you viewed any of these LGBTQ news and entertainment websites in the past 30 days? (Please mark all that apply.)

	Visitors	Non-Visitors	Male	Female	18-34	35-54	55+
Huffington Post / Queer Voices	37%	36%	34%	37%	40%	36%	33%
Queerty	31%	23%	36%	11%	26%	27%	23%
Advocate.com	29%	25%	28%	21%	26%	27%	25%
Out.com	23%	19%	27%	11%	22%	20%	19%
Towleroad	20%	11%	23%	3%	10%	18%	15%
GayCities	18%	11%	21%	4%	11%	13%	16%
LGBTQ Nation	12%	12%	12%	10%	13%	11%	13%
PinkNews	12%	13%	11%	12%	16%	12%	10%
Outtraveler.com	9%	6%	10%	4%	7%	6%	9%
JoeMyGod	9%	7%	11%	4%	3%	9%	11%
Instinctmagazine.com	7%	4%	8%	0%	3%	6%	5%
Passportmagazine.com	4%	1%	3%	1%	1%	2%	3%
Edge	3%	2%	4%	0%	1%	2%	3%
GayGuideNetwork.com	2%	2%	4%	0%	2%	1%	4%
transequality.org	1%	5%	1%	3%	5%	4%	1%
Autostraddle (among female only)	43%	36%	--	38%	74%	27%	5%
AfterEllen (among female only)	20%	19%	--	19%	22%	18%	18%
Lesbiannews.com (among female only)	6%	4%	--	4%	1%	5%	8%
Other	6%	8%	5%	8%	6%	7%	8%
None of the above	24%	30%	28%	29%	20%	29%	33%

Base: Unweighted USA Britain Visitors n=549; USA Britain Non-Visitors n=1,007;  
Female n=626; Male n=838; 18-34 n=501; 35-54 n=587; 55+ n=468

## USA LGBTQ Traveler Segment Results

■ Visitors ■ Non-visitors



	1- Adventurers	2- Buzzseekers	3- Explorers	4- Sightseers	5- Culture buffs
All LGBT	21%	28%	10%	19%	22%
All Men	17%	31%	8%	22%	22%
All Women	27%	24%	14%	15%	21%
All 18-34	11%	48%	5%	11%	25%
All 35-54	22%	25%	9%	18%	25%
All 55+	32%	10%	16%	29%	14%

## Communicating with the LGBTQ Community

### Recommendations

- 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.
- 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.
- 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.



 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%).
- 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, Canadians are 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.
- 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.

## Canadian LGBTQ Community

### 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.

# 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](mailto:david@CommunityMarketingInc.com)