



# GLBT Leisure Travel Study National Press Club

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- A nationally recognized and award-winning strategic public relations and marketing communications firm.
- Bob Witeck and Wes Combs are also the authors of

***Business Inside Out:***  
*Tapping Millions of Brand-Loyal  
Gay Consumers*  
(Kaplan Publishing, September 2006)



# About Harris Interactive



- 12th largest and fastest growing market research firm in the world
- The world's largest panel of respondents
  - HPOL is 100% confirmed opt-in (COI)
  - Approximately 6 million panelist worldwide (40,000+ GLBT)
    - Adding thousands daily
  - 42 million interviews since 1997
- Millions budgeted for panel expansion

# GLBT Panel Background



- All **self-identified** as GLBT via internal screener, along with additional studies
  - Updated quarterly
  - Many demographics
- GLBT Panel was not recruited from targeted gay, lesbian or bisexual websites or lists of readers of GLBT magazines, resulting in a **more representative GLBT panel** (not solely representative of GLBT media subscribers).
- The anonymity of our HPOL recruiting, double-opt-in process ensures the appropriate confidentiality. We believe that the GLBT population in our sample is more **willing to be honest**.
- Interviewed on a **variety of survey topics**, resulting in a reduced risk of learning/panel effects.

# Research Objectives



- Examine the preferences, attitudes and behaviors of Gay, Lesbian, Bisexual and Transgender (GLBT) travelers regarding destination choice and activities for leisure travel.
  - Measure understanding and awareness of GLBT-friendly destinations and travel brands.
    - What “gay friendly” means to GLBT travelers
    - Aided and unaided awareness of destinations/travel brands that are “gay friendly”
    - Role of “gay-friendly” in overall destination choice
  - Spending
  - Media (online/offline) accessed

# Methodology

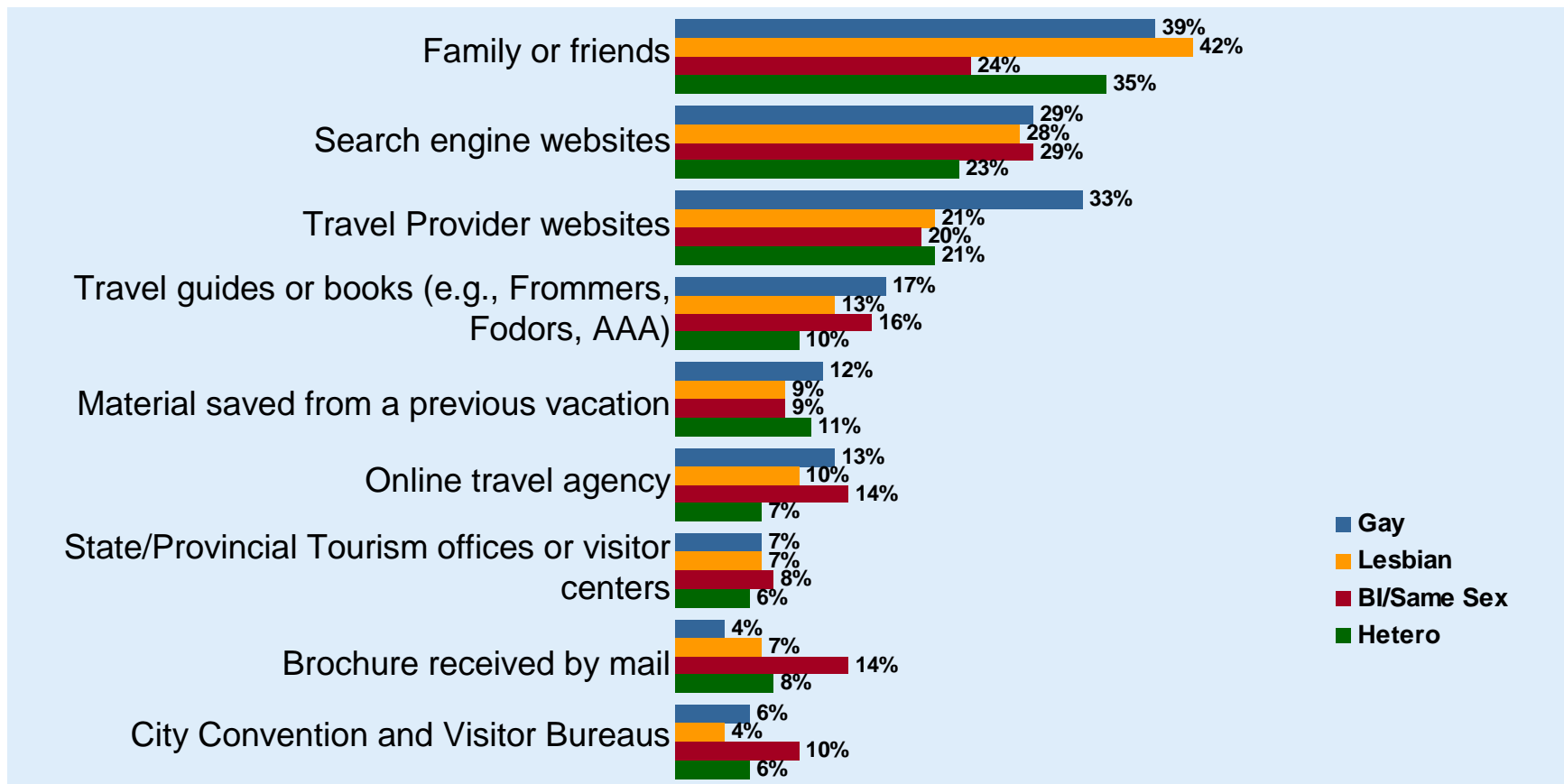


- The **national online survey** was conducted among approximately **2,020 self-identified U.S. GLBT adult travelers** (ages 21 and older) who have **taken at least one leisure trip within the past 12 months**. In addition, another **1,010 U.S heterosexual adult travelers** were surveyed. Both populations were drawn from the *Harris Poll Online<sup>SM</sup> panel*.
- Survey was fielded September 12 through September 21, 2006.
- Both a nationally stratified random sample and a GLBT over sample were drawn. The random sample was first weighted to be nationally projectable and used to develop a profile of the GLBT population that was then used to weight the GLBT over sample to be nationally projectable.
- **Sexual orientation is defined based on respondents' self-reported identification.** Those identifying as bisexual were asked follow up questions about their partner choices (same sex versus opposite sex partners).

# GLBT Travelers Not So Different Regarding Travel-related Sources of Information



Family and friends was the most commonly used source of information to research the most recent trip among everyone except for Bisexuals with the same sex partners. Bi/Same used search engines more than family or friends as a resource. Overall, Gay men used the internet the most, particularly travel provider websites.

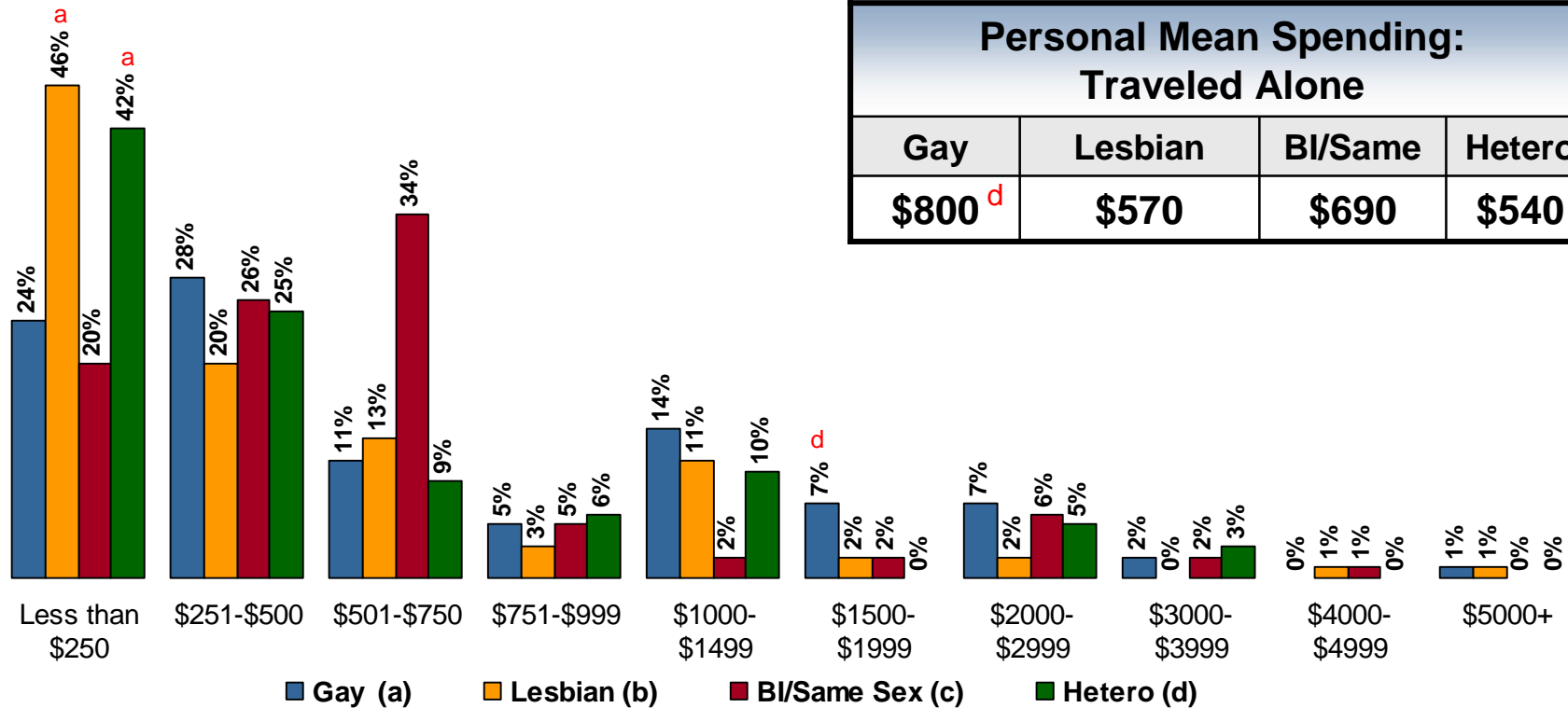


Q600 Which of the following information sources did you use to plan your most recent trip? Base: Qualified Respondents Base: Gay (n=857), Lesbian (n=484), BI/Same Sex (n=161), Hetero (n=1010)

# When Traveling Alone...Personal Spending on Trips Higher for GLBT Market



Concerning the analysis of the most recent leisure trip of people traveling alone, it can be noted that Gay men spend more than Heterosexuals spend.



Q577 For your most recent leisure trip, approximately how much did you spend in total on your trip? Please consider spending to include transportation, accommodations, food/beverage, activities, etc. Please include spending on items that you personally paid for, even if they were for other people. Please enter your response to the nearest dollar. Base: Traveled Alone Gay (n=270) Lesbian (n=97) (Insufficient N for BI/Same Sex (n=34) and Hetero (n=168))

# GLBT Time and Money Supports the Travel Industry



## Gay men tend to spend more on their trips than Lesbians and Heterosexuals.

- **Gay men** spend more nights in paid accommodations (56%) compared to Lesbians (48%).
- **Gay men** purchase more travel products such as airfare (41%) and car rental (20%) than Lesbians or Heterosexuals.
- **When traveling alone Gay men** spend 33% more on their trip in total than Heterosexuals traveling alone. The average spending for Gay men is \$800 compared to \$540 among Heterosexuals.
- When **Gay men** are more likely to **travel with others** on their most recent leisure trip, the average spend of their entire travel party is \$3,070, which is slightly more than Heterosexuals (\$2,870) and Lesbians (\$2,740).

# Travel Party Composition



## Gay men **tend to travel alone** compared to Lesbians and Heterosexuals.

- When asked how many people from their household went on their most recent leisure trip, **Gay men (30%)** overwhelming said they traveled alone compared to **Lesbians (19%)** or **Heterosexuals (15%)**.
- However, **nearly one-half** of the **Lesbians** said that **2 people** from their household went on their most recent leisure trip.
- When asked about their **travel party** which includes those from their households, more **Lesbians** (48%) traveled in **parties of 2** and 25% traveled in **parties of 4 or more** .



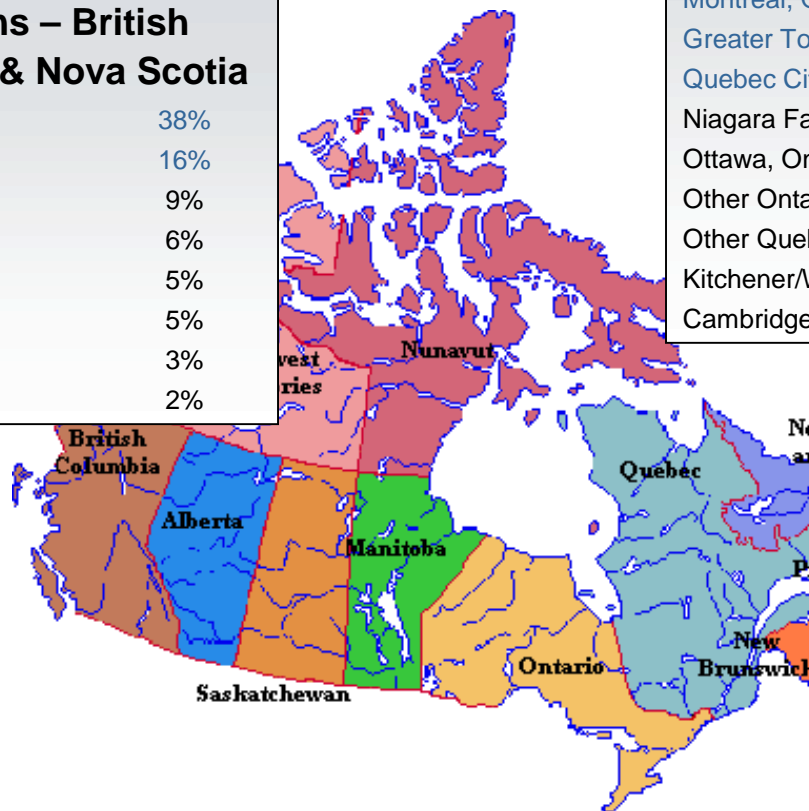
# Gay-Friendly Destinations (Aided) Canada among Total GLBT Respondents



Among GLBT travelers, Montreal (44%), Greater Toronto Area (39%), and Vancouver (38%) are rated highly as gay-friendly Canadian destinations.

Top Destinations – British Columbia, Alberta & Nova Scotia	
Vancouver, British Columbia	38%
Victoria, British Columbia	16%
Calgary, Alberta	9%
Halifax, Nova Scotia	6%
Banff, Alberta	5%
Other British Columbia	5%
Other Nova Scotia	3%
Other Alberta	2%

Top Destinations – Ontario & Quebec	
Montreal, Quebec	44%
Greater Toronto Area, Ontario	39%
Quebec City, Quebec	20%
Niagara Falls/Niagara Region, Ontario	15%
Ottawa, Ontario	12%
Other Ontario	6%
Other Quebec	6%
Kitchener/Waterloo/Stratford/Cambridge, Ontario	5%



Other Destinations	
Prince Edward Island	6%
Manitoba	3%
Newfoundland and Labrador	3%
Northwest Territories	2%
New Brunswick	2%
Saskatchewan	2%
Yukon	2%
Nunavut	1%

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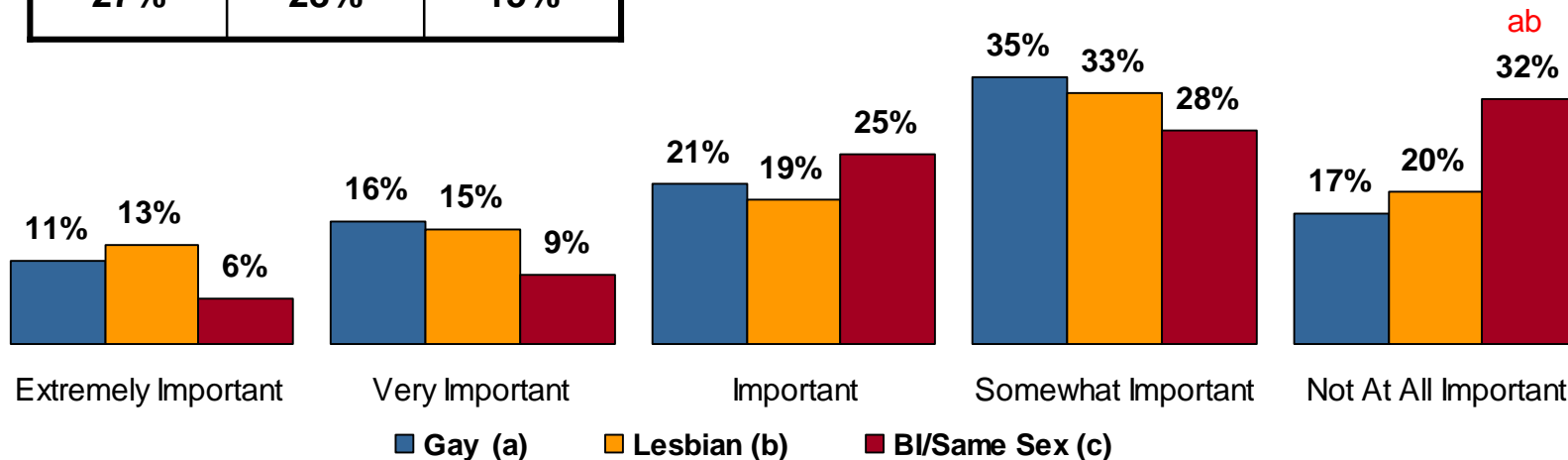
Q6055 When thinking about gay-friendly destinations, which of the following Canadian destinations, if any, do you consider to be gay-friendly? Please select all that apply. Base: GLBT Respondents (n=1546)

# Importance of a Destination Being Gay-Friendly



Nearly one-half of all Gay men (48%) and Lesbians (47%) state that a destination being gay-friendly is important to them when choosing a destination to travel. In fact 27% of Gay men and 28% of Lesbians feel that this is **Extremely/Very important**. Bisexuals with same sex partners on the other hand, have a large majority say it is not at all important to them (32%).

Top 2 Box		
Gay	Lesbian	BI/Same
27%	28%	15%



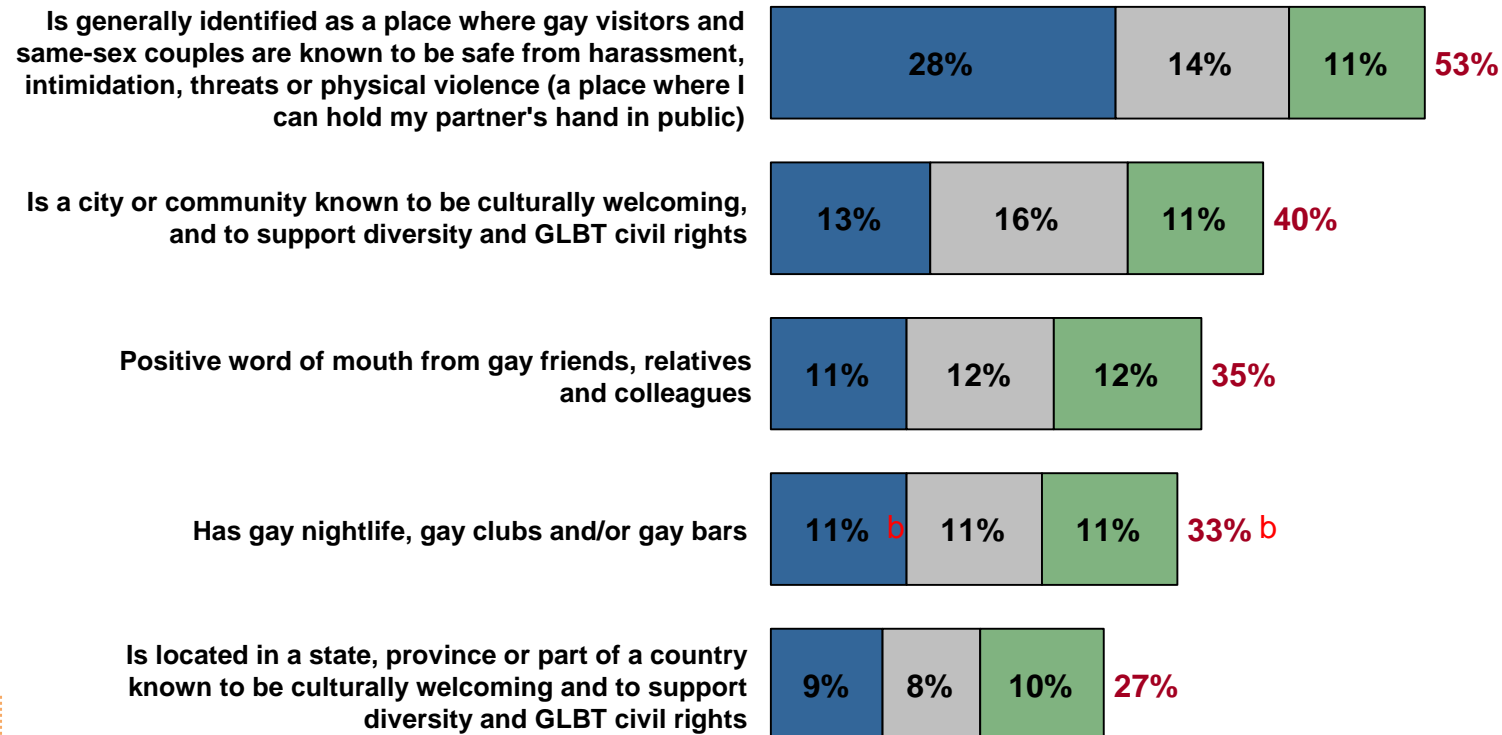
Q700 When choosing a destination to travel to, how important is it to you that the destination is gay-friendly? Base: GLBT Respondents Gay (n=857) Lesbian (n=484) BI/Same Sex (n=161)

# Most Important Criteria for a Destination to be Gay-Friendly among Gay Men



The most important criteria for GLBTs is the ability to be safe from harassment and for the city or community to support diversity and GLBT civil rights. Compared to Lesbians, Gay men are more likely to site gay nightlife as an important criteria for a destination to be gay-friendly.

Gay (a)\*



■ - Ranked 1st   ■ - Ranked 2nd   ■ - Ranked 3rd

\*Significance testing comparing to:  
 •Lesbian (b)  
 •BI/Same Sex (c)

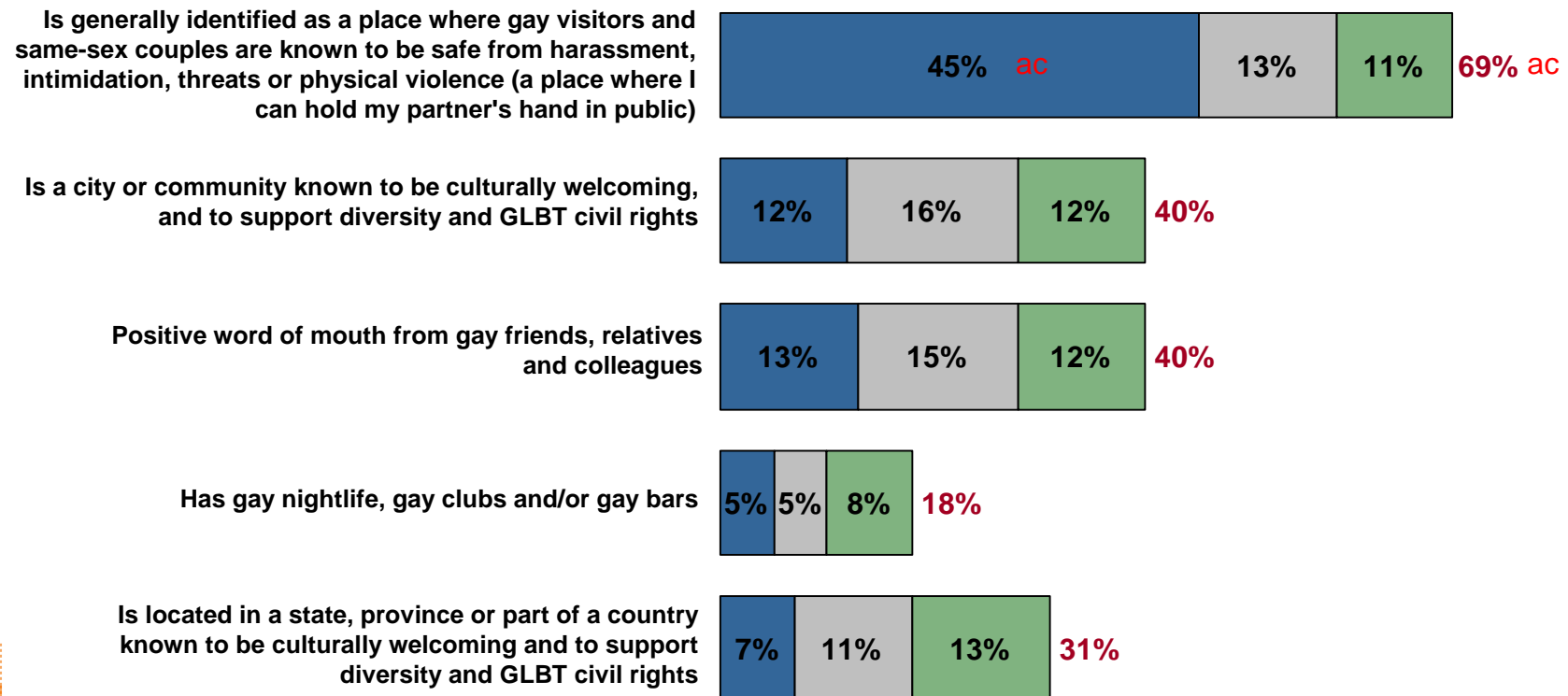
Q730 Thinking of the many ways in which a destination could be considered gay-friendly, please rank what you consider to be the three most important criteria. Please enter a "1" for the most important criterion, than "2" and "3" respectively. Base: GLBT Respondents Gay (n=857)

# Most Important Criteria for a Destination to be Gay-Friendly among Lesbians



Lesbians in particular believe that for a destination to be considered gay-friendly it must be a place where they are safe from harassment, intimidation, threats or physical violence.

## Lesbian (b)\*



■ - Ranked 1st   ■ - Ranked 2nd   ■ - Ranked 3rd

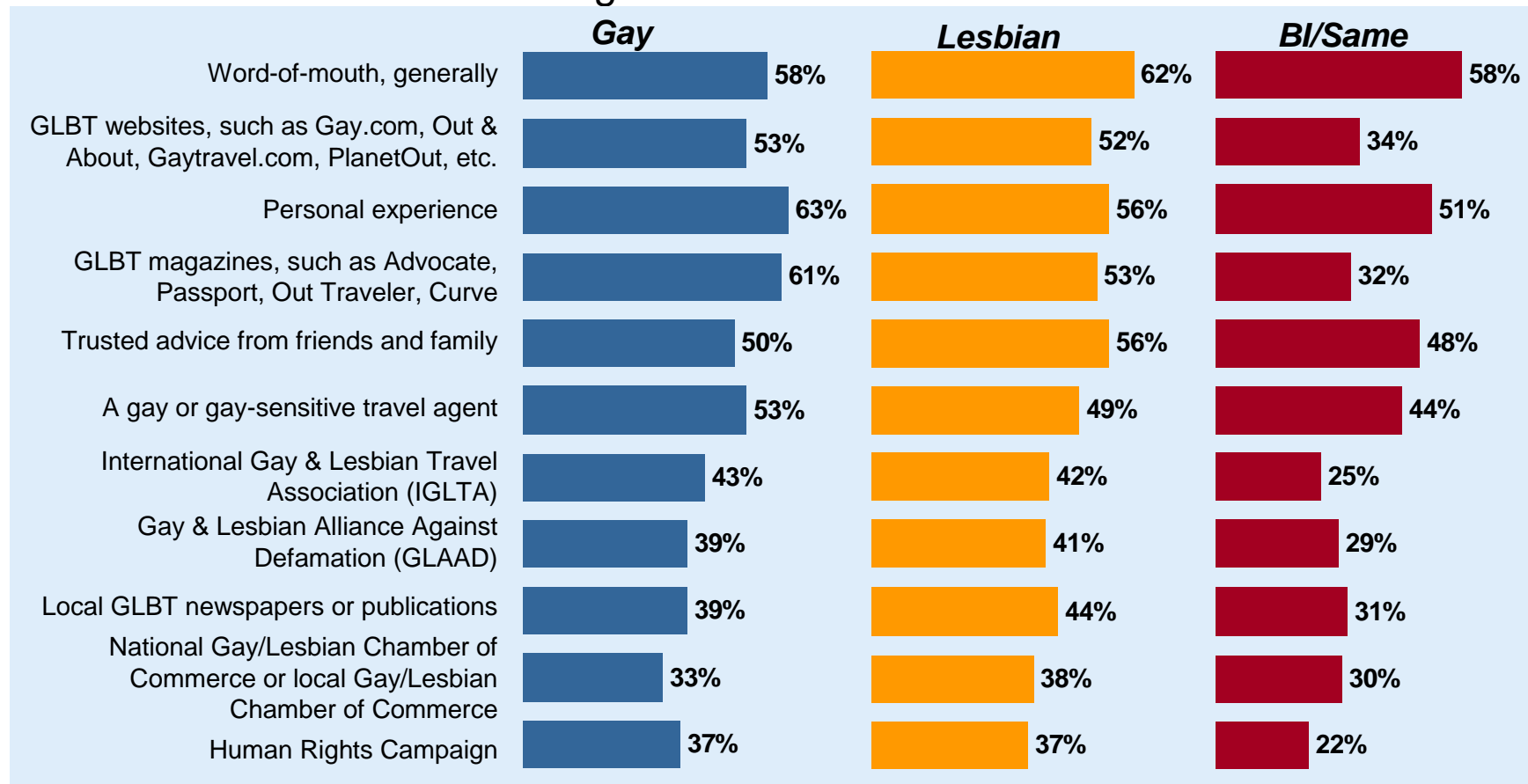
\*Significance testing comparing to:  
 •Gay (a)  
 •BI/Same Sex (c)

Q730 Thinking of the many ways in which a destination could be considered gay-friendly, please rank what you consider to be the three most important criteria. Please enter a "1" for the most important criterion, than "2" and "3" respectively. Base: GLBT Respondents Lesbian (n=484)

# Trusted Endorsement for Gay-Friendly Travel Destination or Provider



Personal experience, word of mouth, GLBT media are the most trusted sources for endorsement among GLBT.

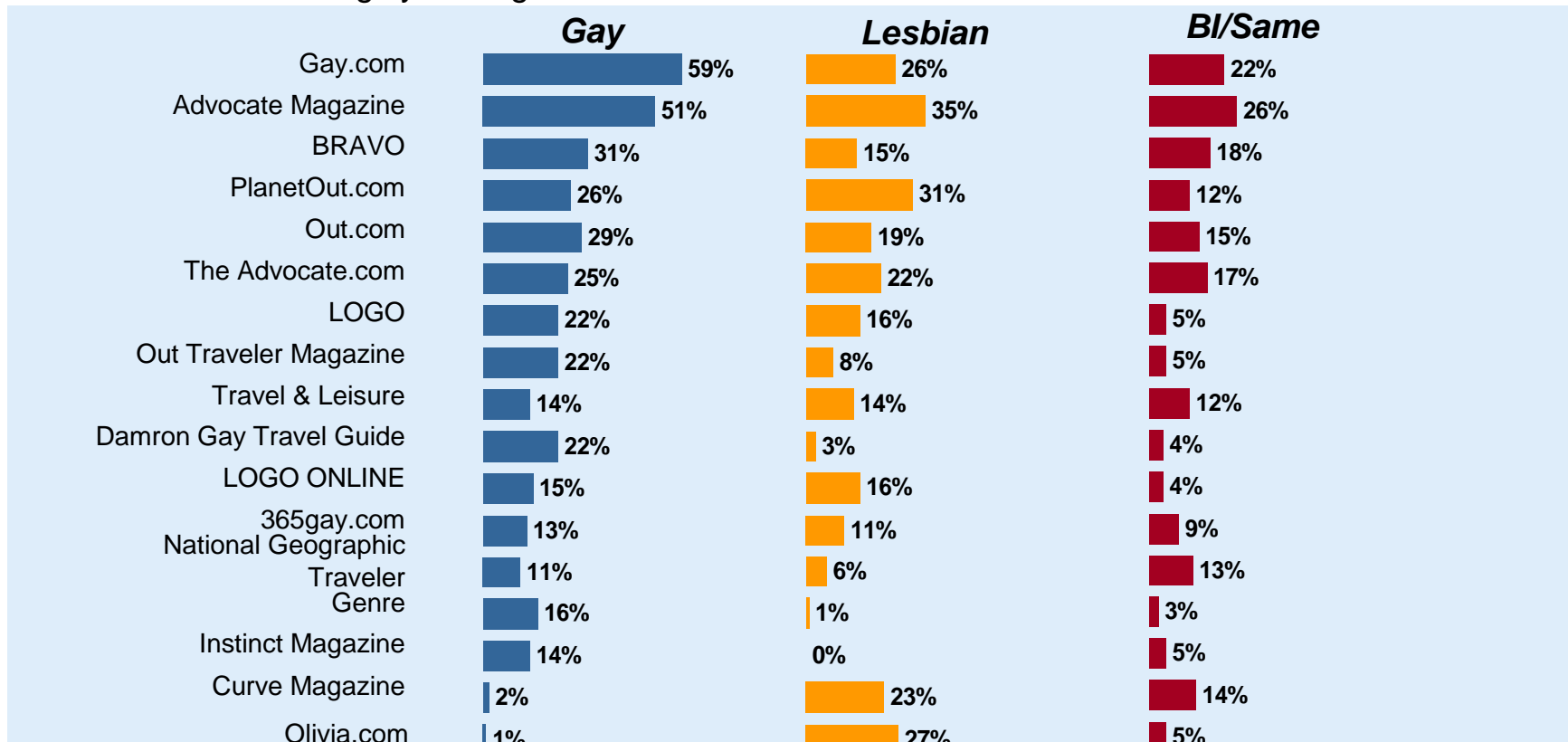


Q760 Imagine that you are seeking a travel destination or provider that is gay-friendly. Which of the following sources would you trust as being an endorsement? Base: Qualified GLBT Gay (n=857) Lesbian (n=484) BI/Same (n=161)

# Publications or Websites Accessed in the Past Year



Among those with Internet access, Gay men have visited more gay-themed websites and read more gay publications in the past year than Lesbian women and Bisexuals with a same sex partner. Gay.com and Advocate Magazine are the two most accessed publications among Gay, Lesbian and Bi/Same Sex audience. BRAVO also ranks highly among Gay and Bi/Same Sex whereas Olivia ranks highly among Lesbian audience.



Q950 Which of the following publications or websites have you read in the past year? Base: Qualified GLBT Gay (n=857) Lesbian (n=484) Bi/Same (n=161)

## Contact Information



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