

Developed by



AITGL
ENTE NAZIONALE TURISMO LGBTQ+

In partnership with



IGLTA
ADVANCING
LGBTQ+ TRAVEL

Italy: the LGBTQ+ travelers' experience

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ETOA ed ELTA Webinar

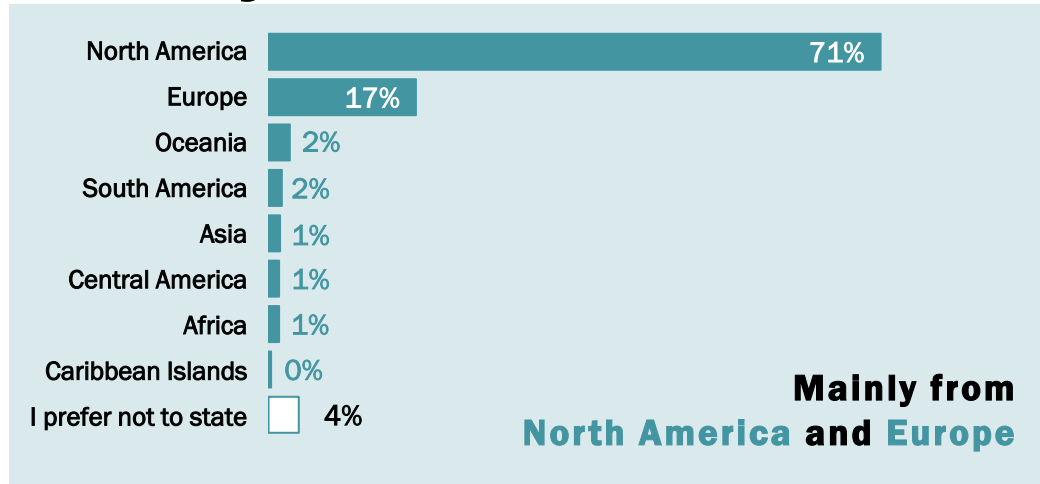
Il valore economico del Turismo LGBTQ+ in Europa

20 Settembre 2023

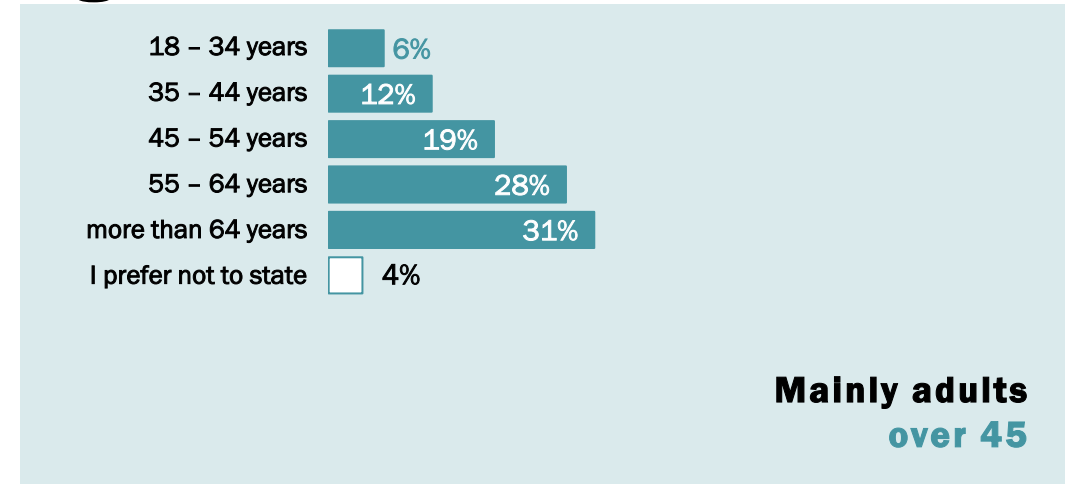
The sample at a glance /1

968 respondents

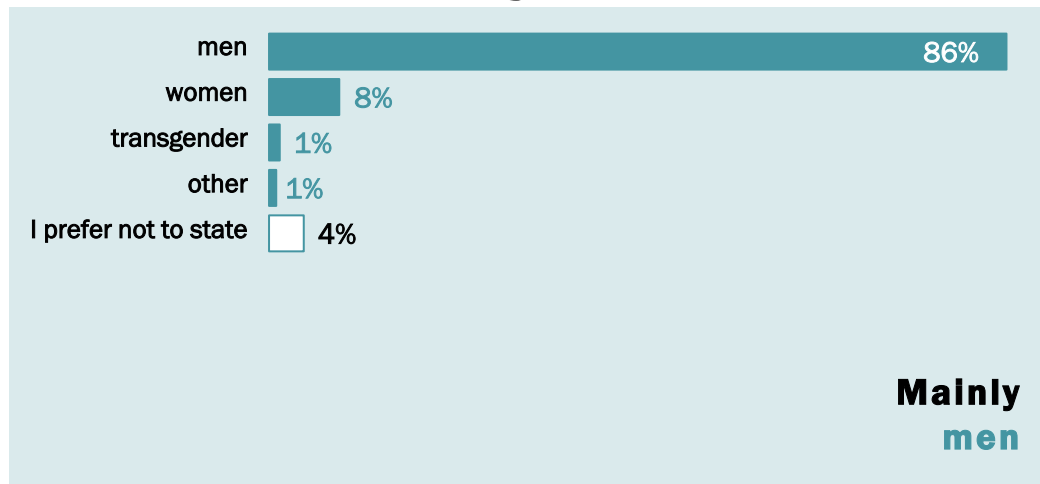
Country



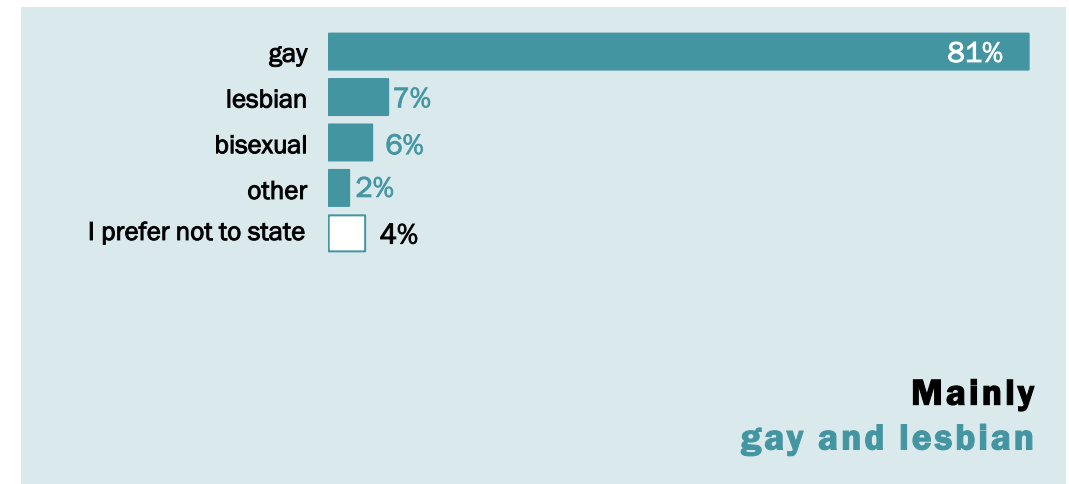
Age



Gender Identity



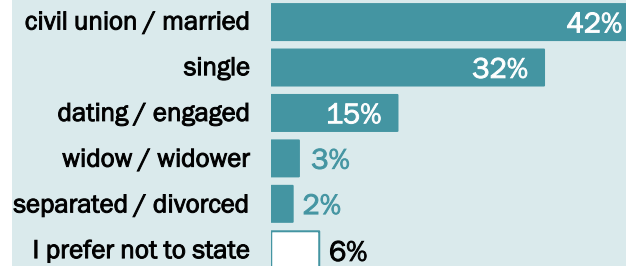
Sexual Orientation



The sample at a glance /2

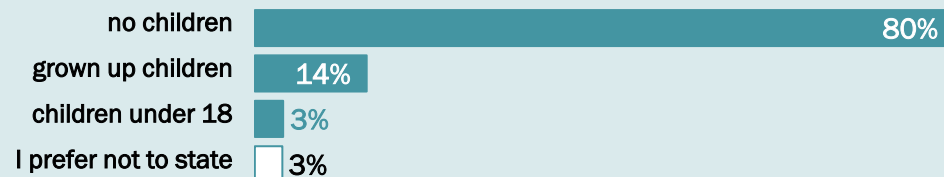
968 respondents

Marital Status



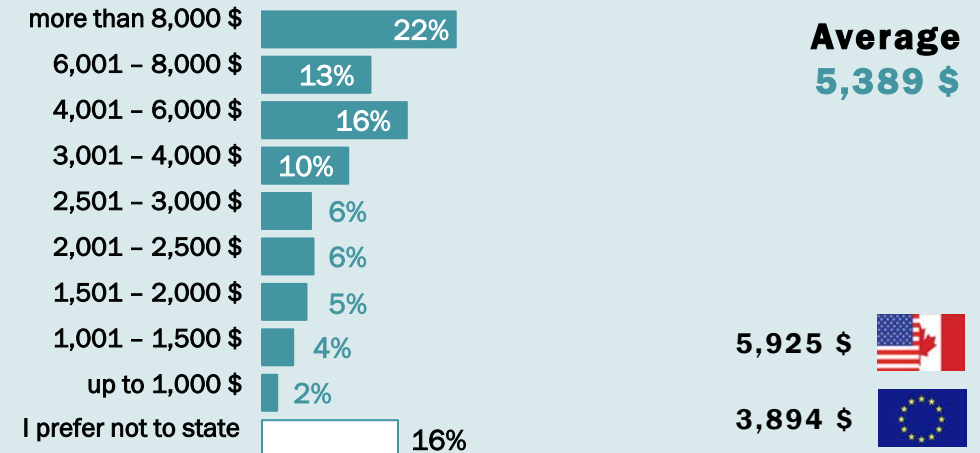
Mainly partnered
(married, in a civil union or engaged)

Children

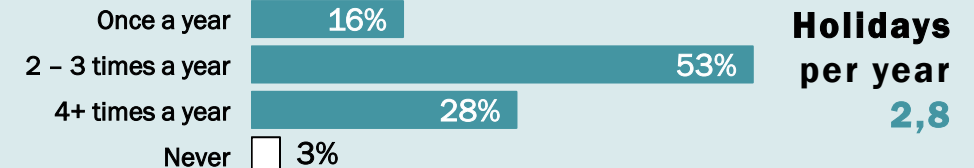


Mainly with no children

Individual Net Monthly Income

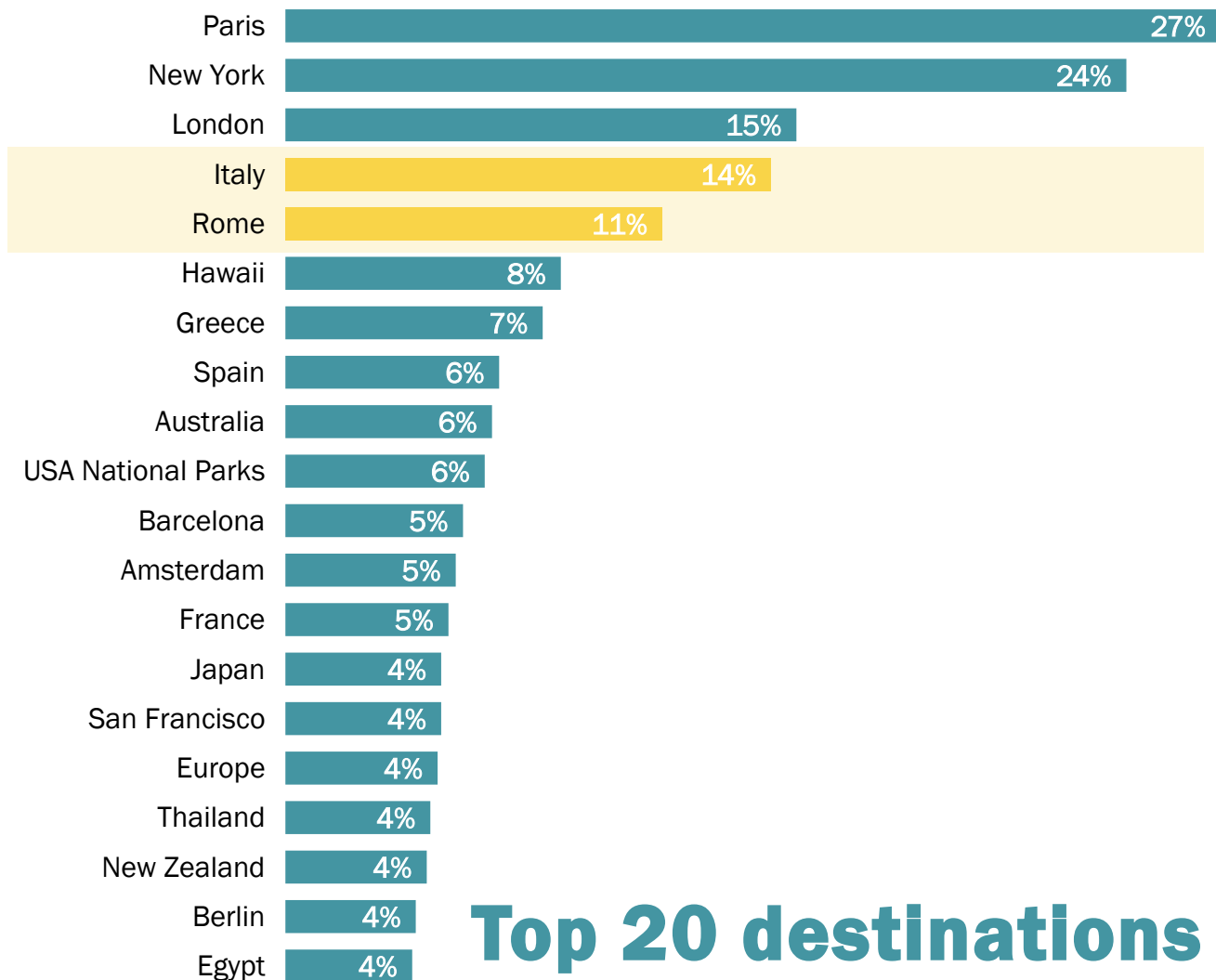


Holiday Experiences



A group of passionate holiday makers

Top of mind destinations



Top 20 destinations

n. 968 | Percentage on the number of respondents

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

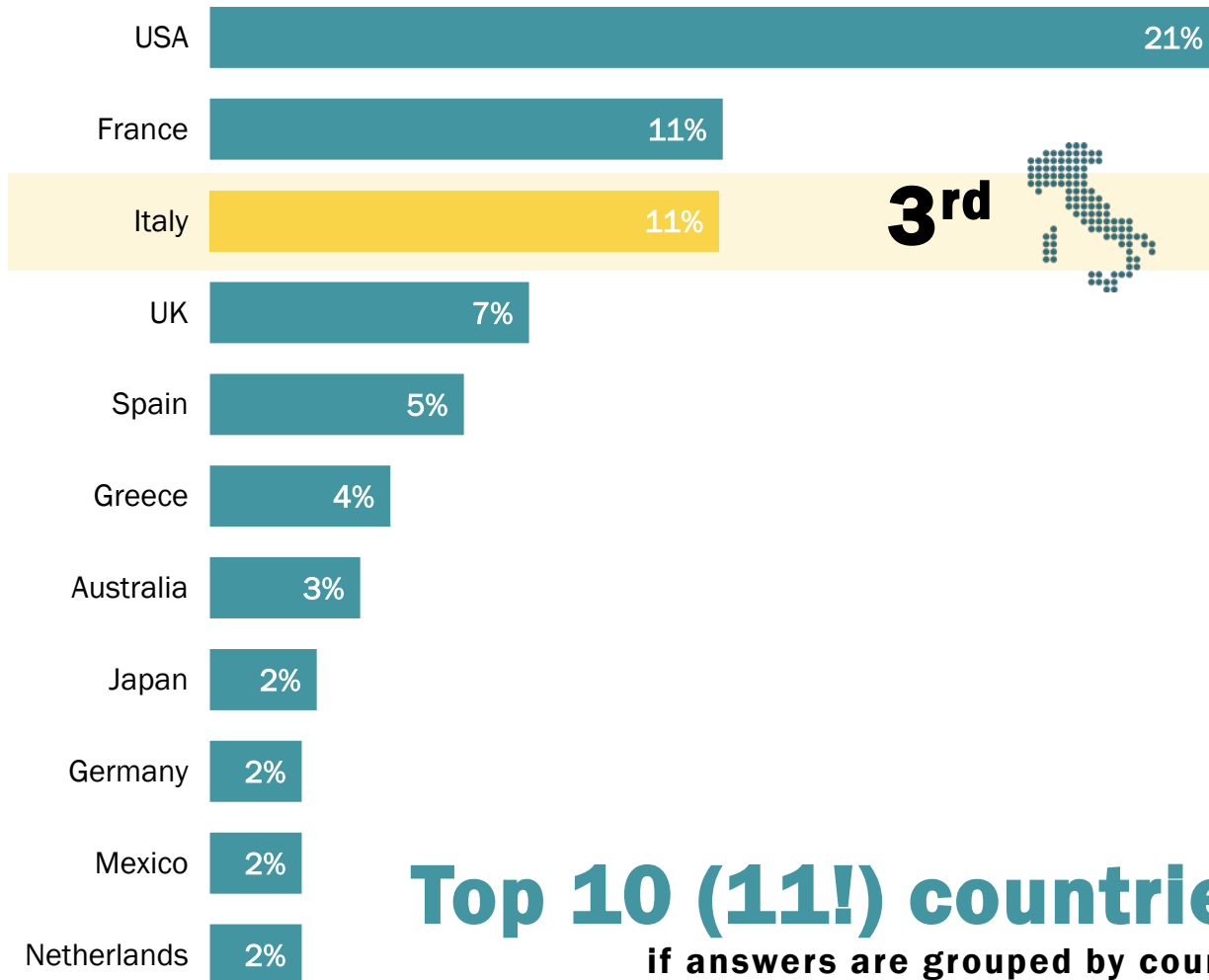
4th



5th



Countries not to miss



3rd



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

n. 2.904 | Percentage on the number of answers

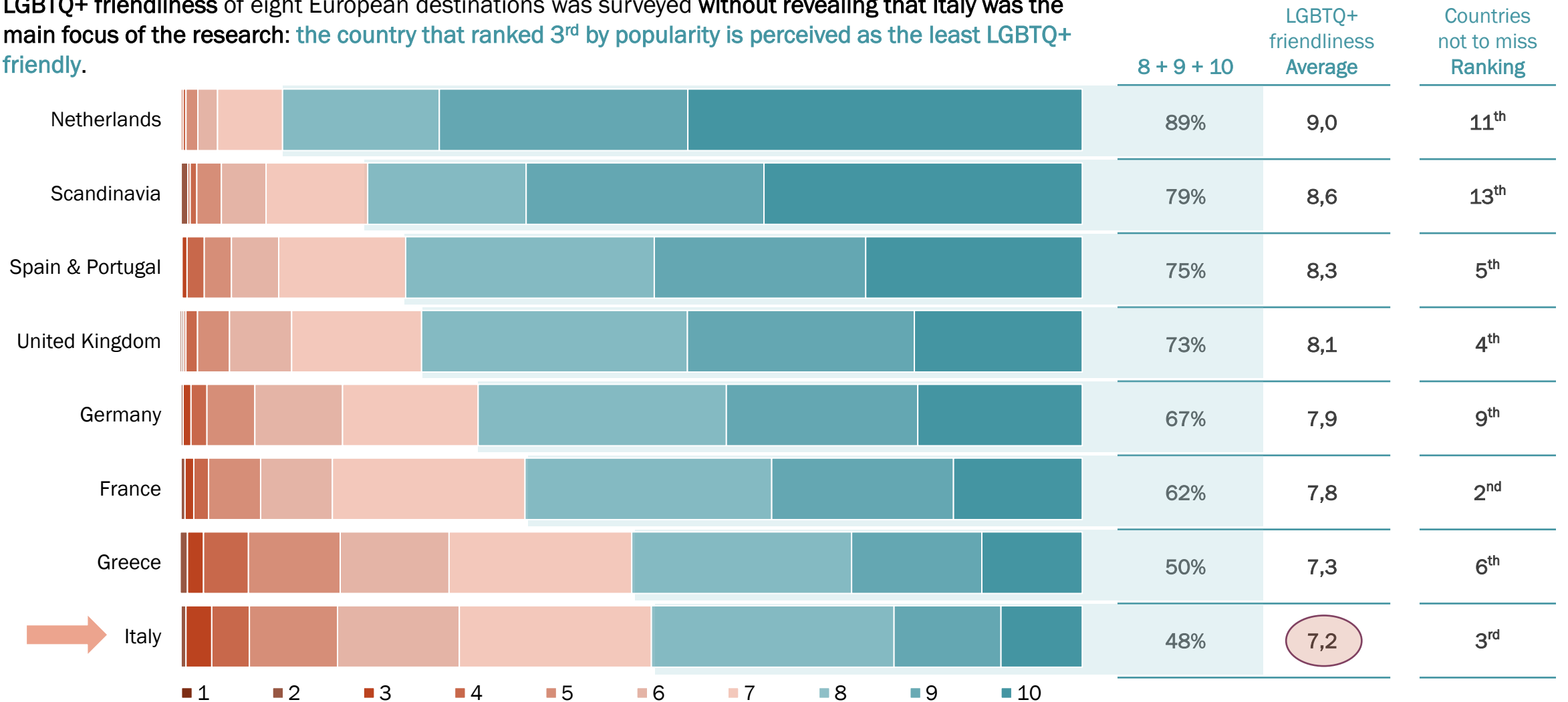
In your opinion, what are the 3 destinations everyone should visit at least once in their life? (open answer)

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

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 3rd 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

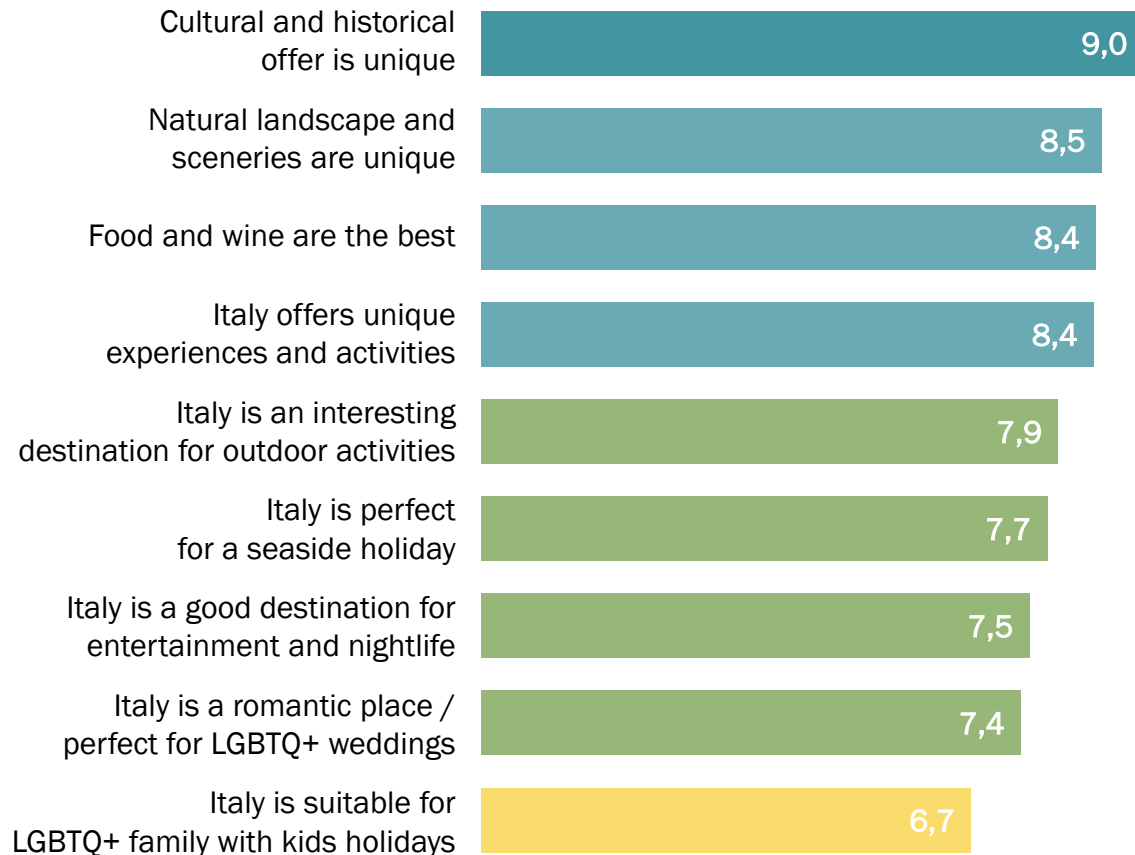
Photo: Wikipedia | Mnemoc

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

Perception of Italy

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?

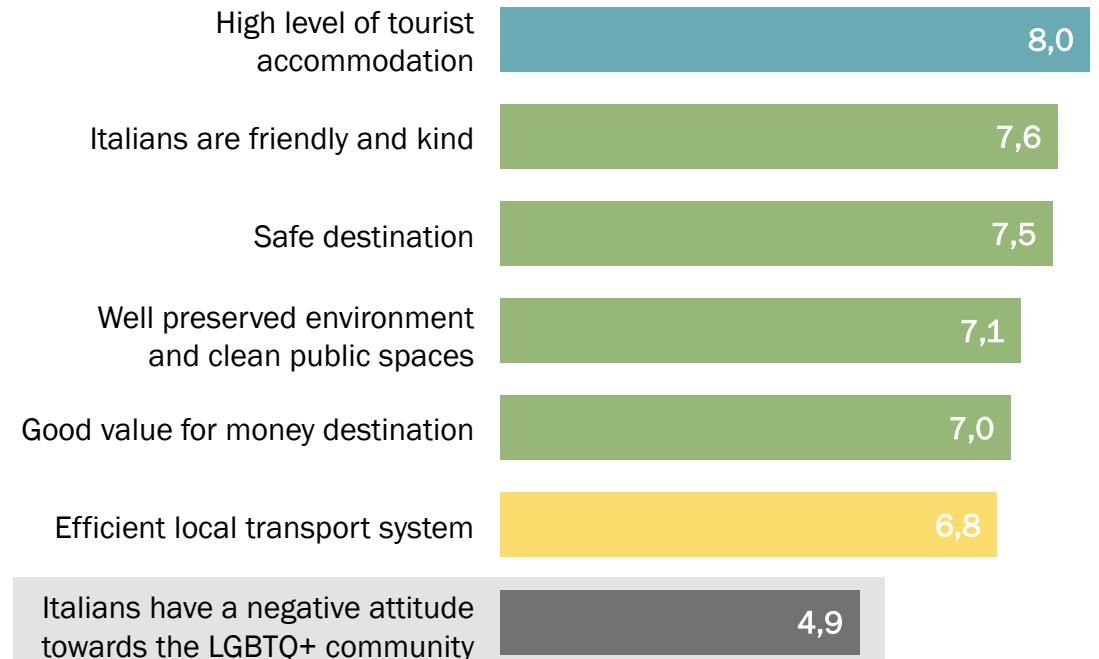
Attractors



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

A good image

Country

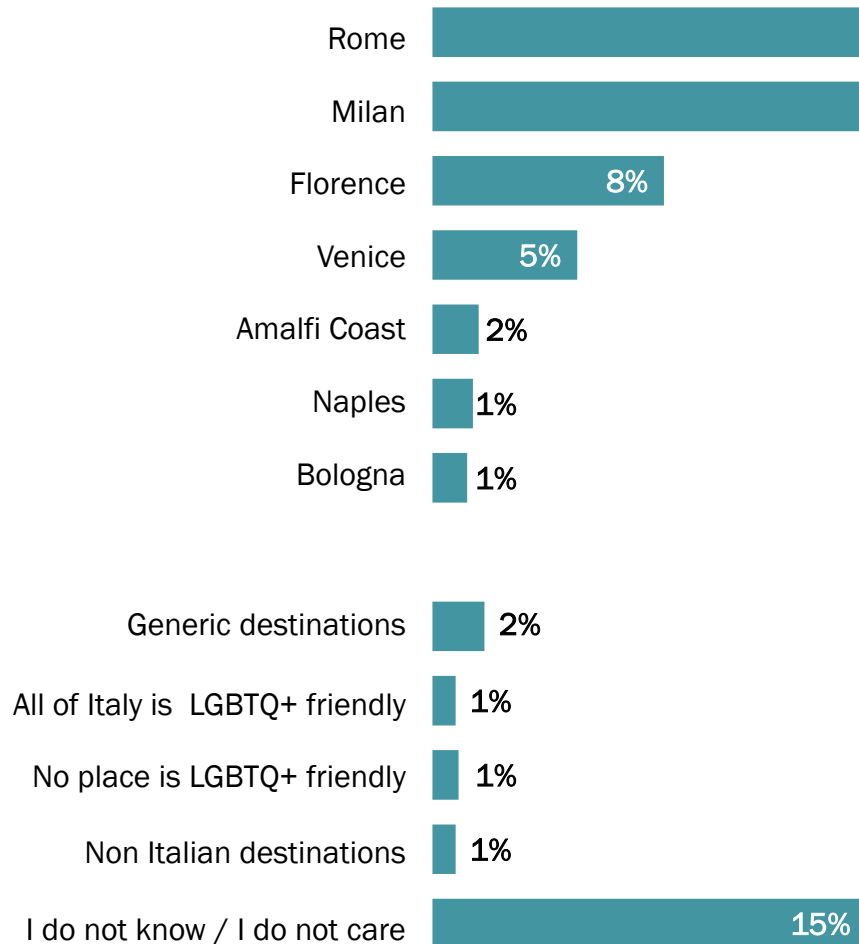


It's a negative sentence: a low average is a positive score!

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

A slightly less good image

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%)

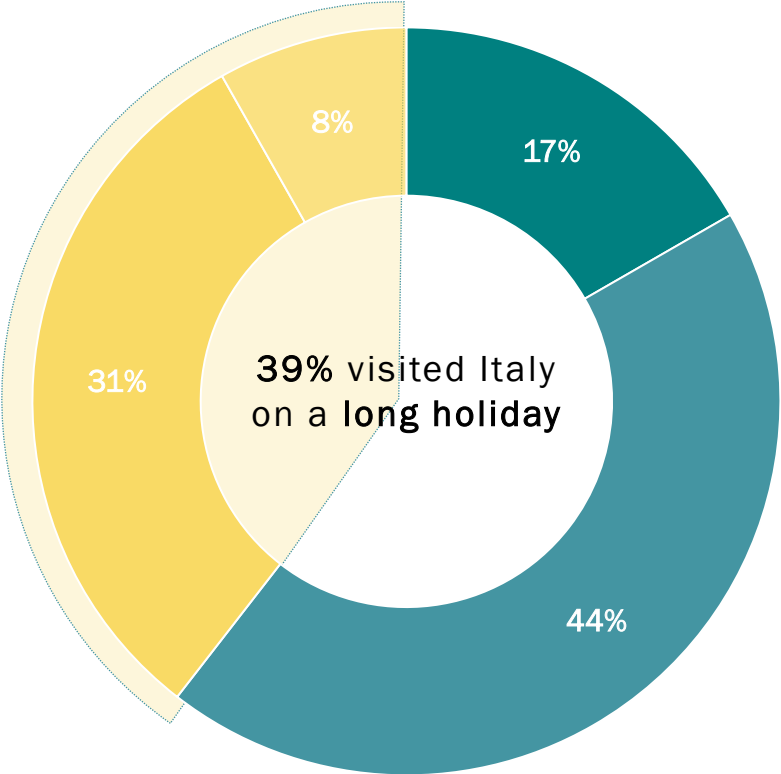
Regions whose destinations were NOT mentioned

- 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%

Holidays in Italy

Length

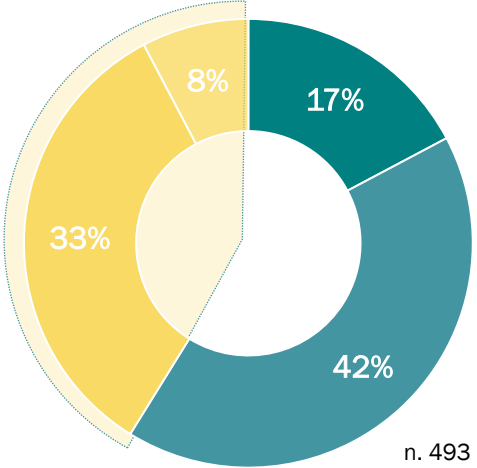


n. 719

- 1 - 3 nights
- 4 - 7 nights
- 8 - 14 nights
- more than 15 nights

7,7 nights

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

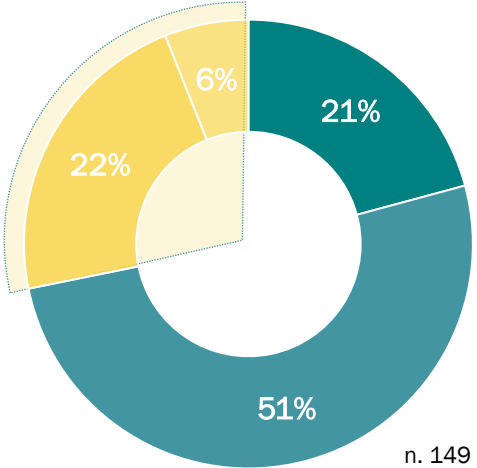


n. 493

North America

41%
Long holidays

7,8 nights
Average length



n. 149

Europe

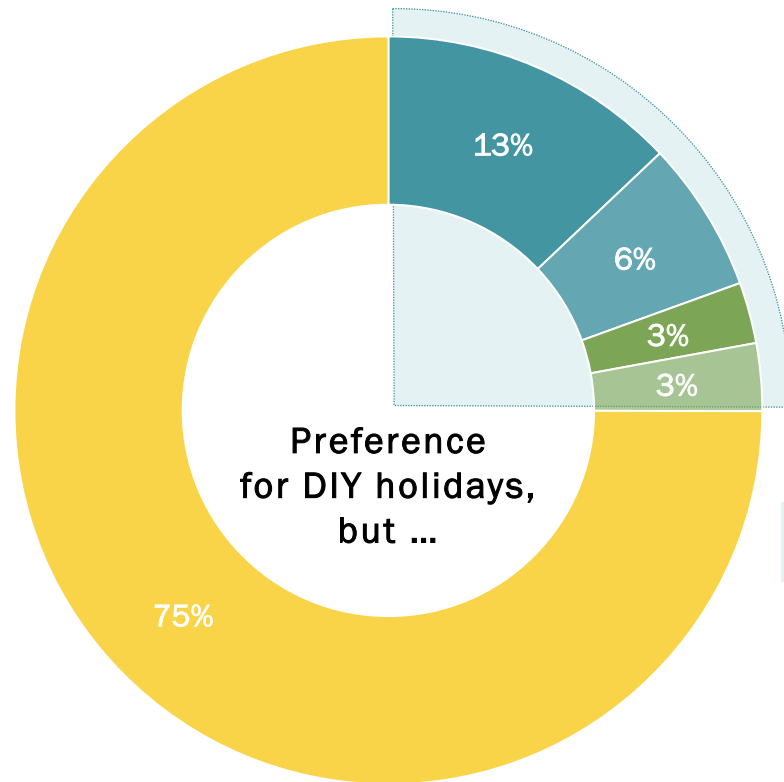
28%
Long holidays

7 nights
Average length



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%).

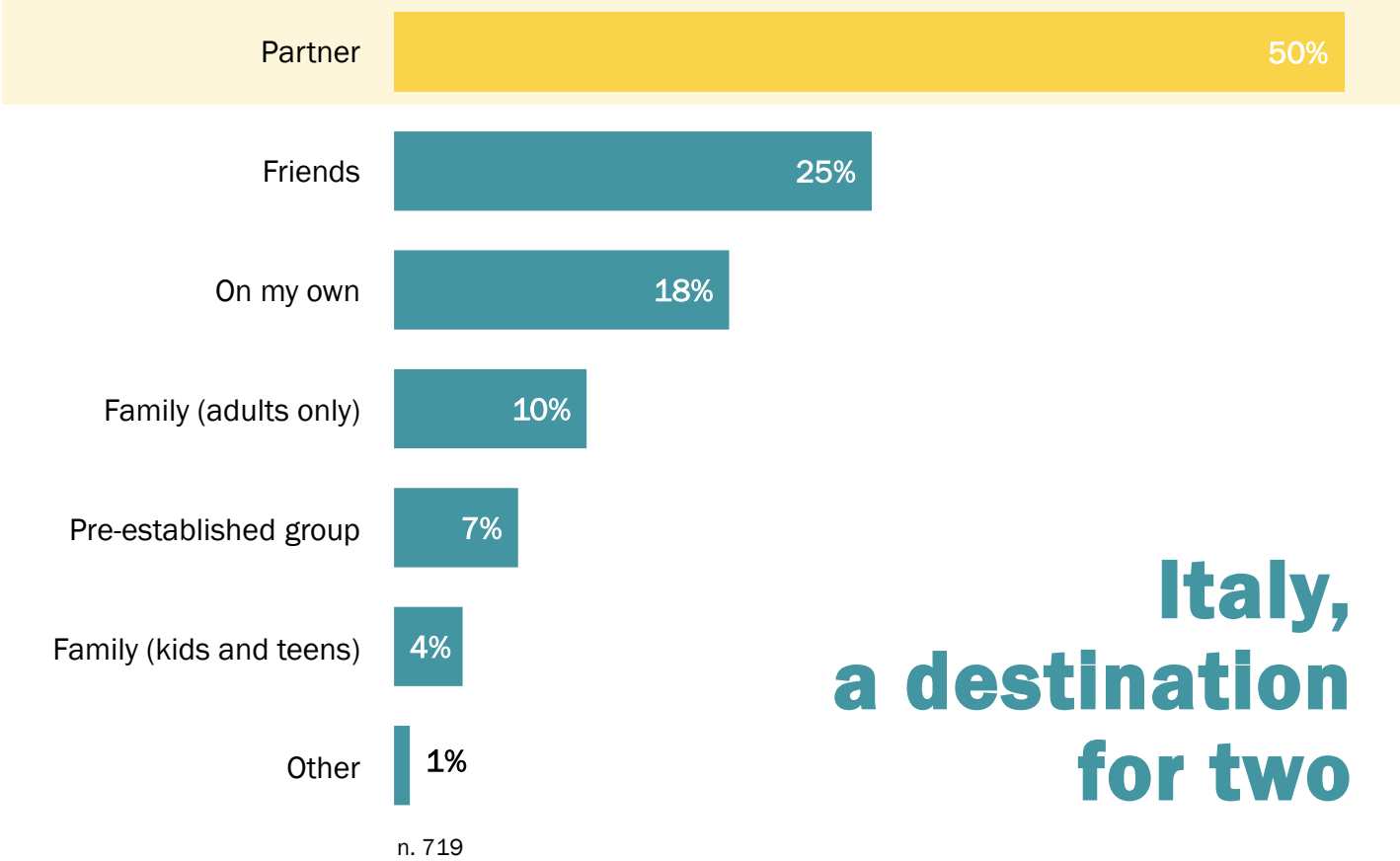
	Men	Women	Other	First timers	Repeaters		
Existing tour package or tailor-made trip	18%	27%	29%	32%	15%	22%	11%
LGBTQ+ existing tour package or LGBTQ+ tailor-made trip	6%	4%	6%	4%	6%	7%	1%
I bought an existing tour package or a tailor-made trip	24%	31%	35%	36%	21%	29%	12%
I arranged everything by myself	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**

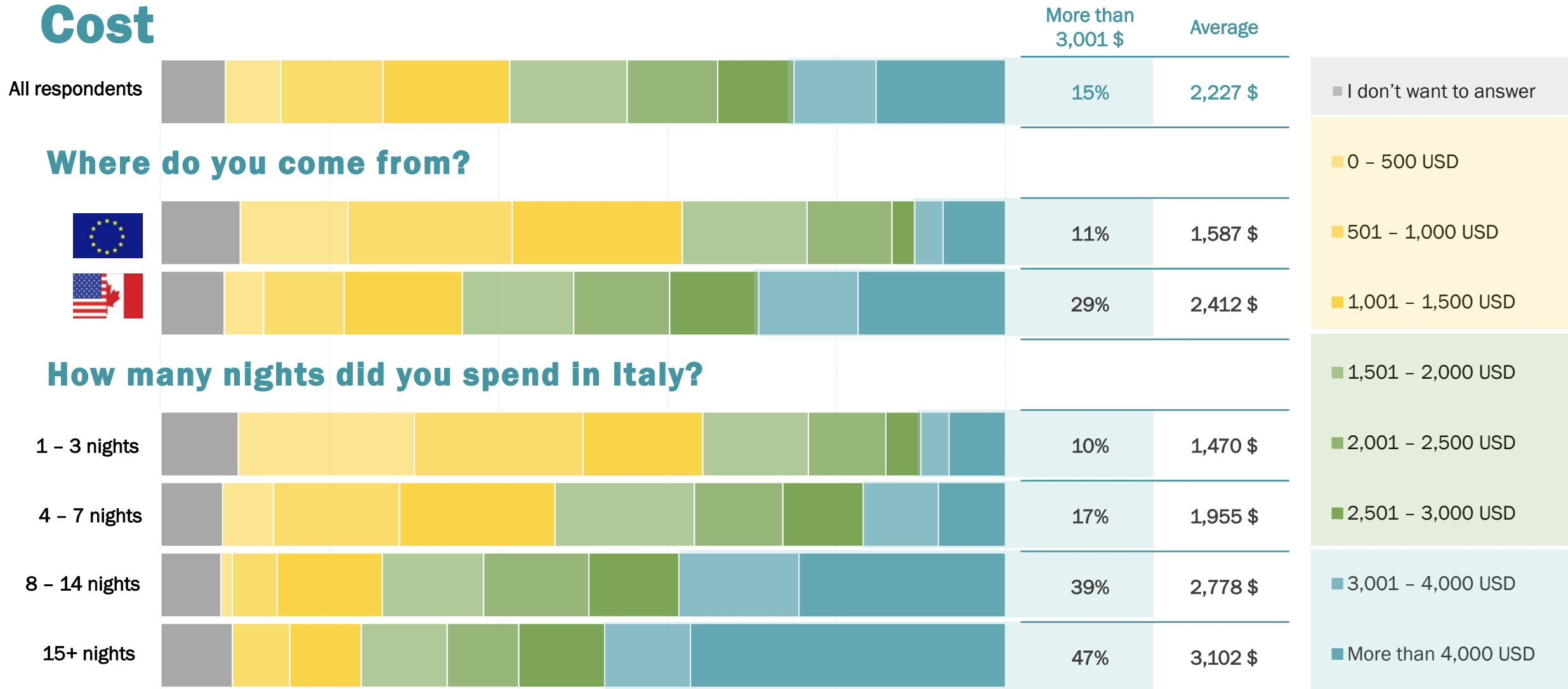
Whom did you travel with during your last holiday in Italy?

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

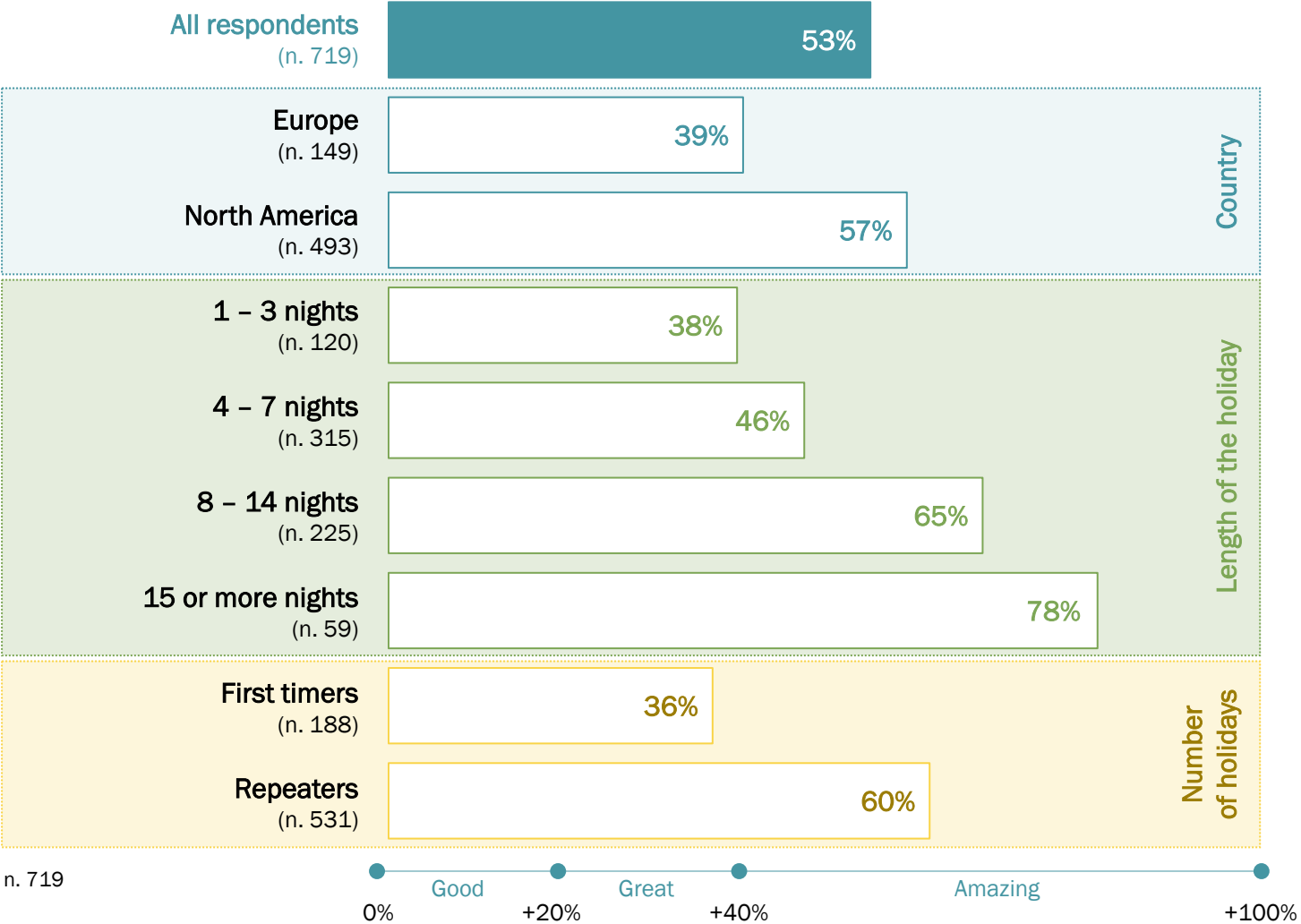


n. 719

Holidays in Italy

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

Net Promoter Score



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Grazie!

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