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TITLE OF ASSIGNMENT: Are the LGBT Millennials Disrupting the Travel Industry as a New Niche Market of Their Own?

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Abstract

This research was conducted in order to acquire a better understand of LGBT Millennials' travel behavior. The concept of Millennials' distinctive and unique motivations in general are already well studied and identified, and theories have been established by numerous experts and academics in the field. The same goes for the concept of LGBT tourism, another widely discussed segment of the travel industry, provided by a long record of literature and research. On the other hand, the combinational theory of both segments put together is a new and unknown topic among experts and academics. This research's objective was to identify, determine and establish a framework for their personal motivations and drivers upon vacation choice, as well as their general behavior when in a destination, especially related to the importance of sexuality and LGBT friendliness. A quantitative survey approach was used with both descriptive and analytical data sets in order to present a LGBT Millennials traveler profile. This research also compare the Millennials' travel behavior to earlier generations in order to detect differences between both and a possible emerging niche market. The findings of this study may be of importance and interest for professionals and businesses in order to anticipate a possible growing tendency and adapt their strategies and products on an early stage. Additionally, this report may be useful for future researchers looking into this topic, used as a guide for further research achieving improved and more accurate results.

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1. Introduction

1.1. Context of the Research Problem

The research problem of this study comes in the wake of the already on-going generational shift which our society is encountering. The rise of this new generation, combined with the rapid evolution in new information and communications technology, will generate a huge impact on the travel industry. This immense effect comes as a result of changes in core customer groups of the businesses. The Millennial generation is not the core customer group for companies today, but it will be in five to ten years, when they enter their peak earning, spending, and traveling years. (Boston Consulting Group, 2015) These generational tendencies may have implications for digital strategies and tactics because Millennials' service preferences differ from those of non-Millennials. Simultaneously there is another booming tourism type, the LGBT travel, which has witnessed record breaking positive trends the last few years (Community Marketing & Insights, 2014). There is undoubtedly a need of an overall redesign of products and services for this new generation in the whole travel industry, but being the most diverse generation ever seen, there might also be specific preferences and tendencies related to the LGBT Millennial as an own niche segment.

1.2. Identification of the Research Problem

Are the new LGBT Millennials disrupting the travel industry as a new niche market of their own with distinctive travel behavior?

1.3. Originality and Contribution to Knowledge

There has already been carried out numerous reports and research works about Millennials as a generation and their characteristics, behavior and other particularities when traveling. The same can be said about LGBT Travel which has been an important topic ever since the 1960's (Johns, 2014). During decades, the LGBT community has been a segment of their own among travel businesses and a whole world of LGBT travel

destinations and products have been generated. If put up against each other, these two crucial customer groups lead us to the research problem of this study. What is all unfamiliar and still yet to discover is the combinational trend of this new generation of LGBT Millennial travelers. On one hand, there is a whole booming and innovating generation that is way more diverse than anyone else before them, and on the other hand there is the LGBT community who have for ages been known for their particular travel behavior and preferences. The combination of the two stirs an interesting debate and speculation of how extensive the changes will disrupt the travel world. What does this generation, known as much more liberal when it comes to for example sexuality (Jones; Cox, 2015), mean for the future of the LGBT travel industry?

1.4. Research Aim and Objectives

The aim of this study was first of all

1. Investigate what characterizes the LGBT Millennial traveler as a niche market
2. Scrutinize to what extent the found tendencies and generational behaviors differ from earlier LGBT travelers. Since these tendencies are constantly growing in importance (Pew Research Center, 2013) they will have implications for digital strategies, customer service organizations and social-media strategy and tactics and it is clear that the companies must develop strategies and tactics that align with this new generation of travelers' habits and preferences.
3. Develop recommendations of an appropriate and relevant marketing approach for businesses in the travel industry targeting the LGBT segment.

2. Literature

2.1. Literature Review

2.1.1. Millennials

I. Definition

Also commonly referred to as Gen Y, MTV Generation or Digital Natives, “The Millennial Generation” or “The Millennials” is the term for today’s upcoming generation following The Generation X (Edelman, 2013). No official dates have been set as to the beginning and end of The Millennials, however it has been popular among demographers and researchers to consider them as those people born between the late 80’s and early 2000’s: more specifically, for “those born in or after 1982 and approximately the 20 years thereafter.” (Howe, 2009 (p.4)).

II. Characteristics

The Millennials’ primary generational characteristic has shown to be that “they are more numerous, more affluent, better educated and more ethnically diverse.” (Howe, 2009 (p.4)) than any generation before them. A distinct particularity unseen in previous generation is that they are the very first wholly digital generation, representing individuals who were born into a world with internet and mobile phones (Edelman, 2013). Furthermore, The Millennials also differentiate themselves drastically in terms of their attitudes toward a variety of facets of modern life. In terms of their outlook towards employment they set high expectations to themselves, combined with an elevated self-confidence and a greater desire to work in teams than any other generation. At the same time, they place high value on a balance between work life and social interaction with friends and family. (Gilbert, 2011)

III. Millennials as Consumers

The Millennials represent the biggest generation alive today counting more than

1,8 billion people on a global basis (U.S. Census Bureau, 2012) and is expected to outpace their precedent generation by 2028 in the US (US Census Bureau, 2015). A big part of the generation are still in their late teens or early 20's but they are gradually and steadily stepping into their golden years in terms of consumption and earnings. They will start buying houses, having children which will affect real estate and education businesses. Later they will get older and higher purchasing power making up a 75% of the total workforce by 2025 (Business and Professional Women's Foundation, 2011) and this will have transformational effects on travel and luxury goods industries (Greenberg, 2008 p. 21). While the Baby Boomers have for a long time been the main focus grounding marketing principles and strategies for businesses, they are now, naturally enough, being phased out. The Millennials are expected to surpass the Baby Boomers in earnings already in 2018, representing a remarkable spending power estimated to \$2,5 trillion (Harris Interactive and Deloitte, 2011). As if this was not enough, there is also evidence of a significant influential impact made by the Millennials on their friends and parent's decisions when purchasing (Edelman, 2012).

IV. Millennials and Marketing

As mentioned initially in this study, The Millennials are crucial to marketers due to the simple fact that they are progressively becoming their main customer group. A noteworthy detail is that the new generation represents are urban individuals who like to bond with the cities they live in and for the very first time, more people live in city areas than in rural communities (United Nations, 2011). This is something businesses are forced to consider when developing new customization plans and strategies related to targets and segments. Also, when it comes to gender and conservative gender roles in society, a shift has been seen directly impacting marketers. The Millennials are no longer representing the same roles as before with more than 6 of 10 US college students being

female, and more and more men mutually participate in household and purchasing duties at home (Digest of Education Statistics, 2010). This requires businesses to loosen up their tight gender related marketing and accept the new upcoming blend of consumers.

V. Millennials as Travelers

As travelers it is especially in terms of purchasing process and use of new technology, both before, during and after ended vacation or trip, that this new generation differentiate themselves from non-Millennials (Barton et.al., 2013). To begin with, the Millennials is a generation of diversity who embrace a global perspective and are open to new experiences, all characteristics suggesting a generation of natural travelers (Barton et.al., 2013). As a result of being born straight into the whole new cluster of technology and changes in lifestyles, the Millennials were also the first ones to implement the technology into their daily lives (Howe, 2009).

Millennials have shown to be attracted towards new and unfamiliar places that can generate an adventurous, local and personal experience (Airbnb, 2016). Opposed to other young generations, they are no longer travelling in look for parties but instead they want to look for an unique trip by fully immersing themselves (Topdeck Travel, 2016).

VI. The Travel Industry's Approaches

Even though these trends are relatively recent there are many examples of top travel brands of the industry who already have responded by creating new brands exclusively for Millennials, adding creative services and amenities or completely overhauling brand communications to appeal to this new generation. One of them is Carlzon Rezidor Hotel Group who have launched a

new hotel chain called Radisson Red. They offer bold design and hyper-personalization through a mobile app. These let the guests for example have the minibar pre-stocked with their favorite drinks, arrange airport transfer on the fly or check in to their guestroom while they're on their way. (Carlson Rezidor, 2015) Marriott International has also been working to attract younger travelers. They want to introduce their modern three-star Moxy brand to the United States in the following years with trendy bars, contemporary art and free Wi-Fi as their first priorities. The lobbies are designed to be social hubs with ample power outlets for personal devices and a digital guestbook for streaming videos and pictures via Instagram (Mayring, 2015).

2.1.2. LGBT Tourism

I. Concept

Before doing any further in-depth research about the concept it is undoubtedly important to understand what really LGBT Tourism is and what it really consists of. For many it is commonly known as "Gay Tourism" but it goes slightly further than that. The abbreviation LGBT comes from Lesbians, Gay, Bisexual and Transgender people and in terms of tourism it is a form of niche tourism marketed to this collective. The growth of LGBT tourism has skyrocketed throughout the last decade with more and more destinations and travel businesses such as hotels targeting travelers from this community (Robinson et.al, 2011).

II. LGBT Travelers' Motivational Factors

Before looking into the LGBT community's travel behavior it is necessary to mention that they can not, as any other group of society, be generalized and judge all alike as a group. It is crucial to bear in mind the individual factors and the broad spectrum of diversity there is, also among LGBT individuals. In other words, there might be individuals who do not desire to travel to LGBT friendly

destinations, some who might not have any preference either direction (straight or LGBT) while travelling, and others may be looking specifically for LGBT friendly destinations, accommodations and other travel services that are targeting this very customer group.

Nonetheless, an abundant number of research and studies do identify a series of distinctive characteristics of the LGBT community, factors that businesses and marketers are required to consider when targeting them as customers. According to Hughes (2002) and Gorkem(2012), there are some specific and peculiar factors, both push and pull, that influences LGBT individuals the most when deciding where to travel. They can be categorized as following:

- Push-factors
 - Social escape
 - Identification
 - Acceptation
 - Anonymity
- Pull-factors
 - Friendliness
 - Concentrated gay environment
 - Gay space

The above principles show that LGBT travel involves a complex mix of motivational factors on both superficial and deeper emotional levels. Despite the global progress being made in terms of LGBT acceptance, there are still many countries and communities that continue to discriminate and even punish due to sexual orientation. LGBT individuals living in these societies might suffer on a daily basis and for them, tourism and travel may function as a form of relief and freedom. Many may still be living double lives at home as a result of negative attitudes, violence or other personal reasons (Monterrubio, et.al., 2007 p. 58). As soon as they are traveling they tend to be more open about their sexual orientation without the compulsion to challenge prejudices and other negative reactions (Hughes, 2002 p. 299). Put differently, travel is no longer simply a

leisure activity in which one seeks fun and relax, but it operates as a way of identity search for LGBT individuals. It opens up another dimension, offering an opportunity for people to identify, socialize and live with other individuals who share the same beliefs (Hindle, 1994 p. 11).

III. LGBT Travelers' Behavior

In correlation with the above motivational push and pull factors, there has also been distinguished throughout the years a set of travel behaviors related to the LGBT community. As reported by Guaracino (2007), Gorkem (2012) and Lonely Planet (2014), the most noticeable findings are as following:

- More likely to travel in same sex couple, in groups of friends or alone and *not* as part of an escorted group.
- Travel more frequently and at various times of the year than straight travelers
- Higher spending than straight travelers in general (up to 30%) due to higher overall disposable income
- Higher preference of premium products and services than the average tourist
- Brand loyal while seeking gay friendly destinations and businesses
- Responsive to marketing that targets gay friendly destinations
- Higher preference of destinations with a lively, prominent and known gay culture and community

The findings presented show us that the LGBT community in general *do* show noticeable behavior characteristics when traveling. For many of these individuals, holidays are perceived as a temporary spatial dimension where they can enjoy relaxation, cuisine and sunshine but at the same time avoid social discrimination and intolerance (Monterrubio, et.al., 2007 p. 58). For many it is a form of escape

from social censure as in discrimination and criminalization, but for others it is a possibility of being anonymous and a longing of feeling accepted. There are positive aspects to these behavior patterns as well; a study has also distinguished individuals who simply are seeking socialization, identification and manifestation with, and of, the LGBT community and its peers (Hughes, 2002). By linking these characteristics to the motivational factors discussed previously we can get a acquire a better understanding of the deeper influential factors of why LGBT travelers really look for gay friendly destinations and accommodation to begin with.

2.1.3. LGBT Millennials

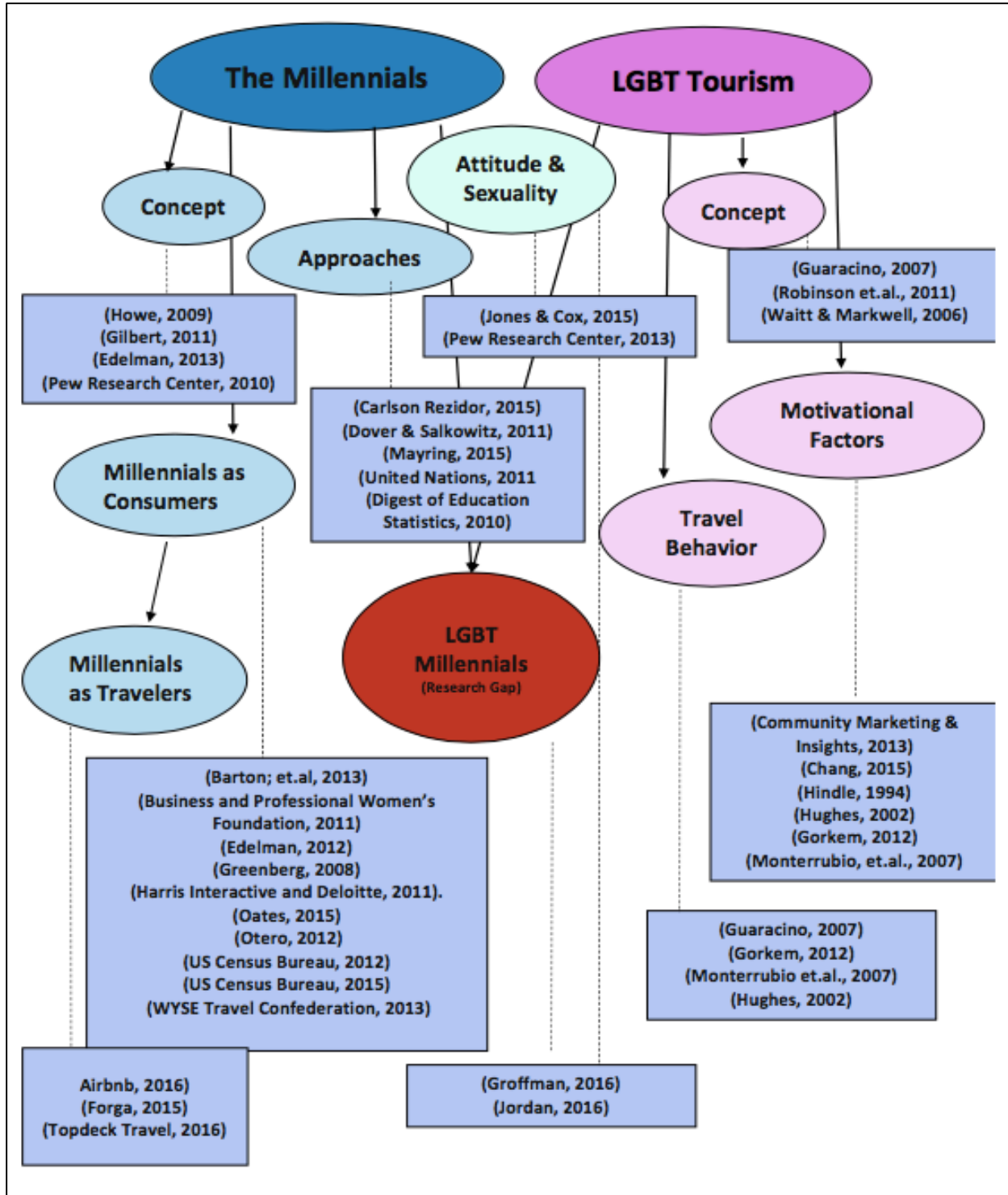
Consisting of two increasingly powerful and extensive tourism market segments in terms of profit and volume, this leads to an additional approach to the subject: the LGBT Millennials. This combinational aspect has emerged following the rise of the Millennials and their consistently increasing role in travel and tourism as customers. Their strong peculiar needs and preferences, which are already are changing strategies and manner of travel and marketing, leave us with the question if the same aberrant behaviors will be observed in LGBT tourism.

In light of the fact that this is a discussion of an extremely new phenomenon, very little information and literature is available or written on the topic. Until recently, literature written of any kind was little to non-existent, however, in 2016 several noteworthy annual LGBT conferences and conventions broached the subject. According to Jordan (2016), who spoke at the IGLTA Annual Global Convention in Cape Town, the LGBT millennials are showing less reluctance towards identifying themselves with the community, a rise of 3,5% in two comparable studies from 2011 and 2015 respectively. Jordan also presented data showing how LGBT Millennials view their sexuality much more of a non-issue than other generations.

Adding to the list of primordial contributions to the growing aggregation of data on how LGBT Millennials are changing the travel industry, Groffman (2016) discussed the same topic at another LGBT conference in Argentina. The statements presented support the same tendency previously discussed and clearly show a dramatic decrease over the past 10 years as to search interests in “gay travel” on Google. These are one of the first proven datasets confirming the reality of LGBT Millennials travelers endeavoring to become part of a more open, free and LGBT friendly world. Nevertheless, Groffman (2016) also claimed that even though the LGBT travelers still are visiting LGBT friendly destinations and businesses, at the same time they are sharing a much broader spectrum of interests. Just as other Millennials, they are seeking unique, exotic and new experiences. Yes, they do choose to travel to LGBT friendly places, but not exclusively as before, Groffman (2016) concluded.

2.2. Literature Map

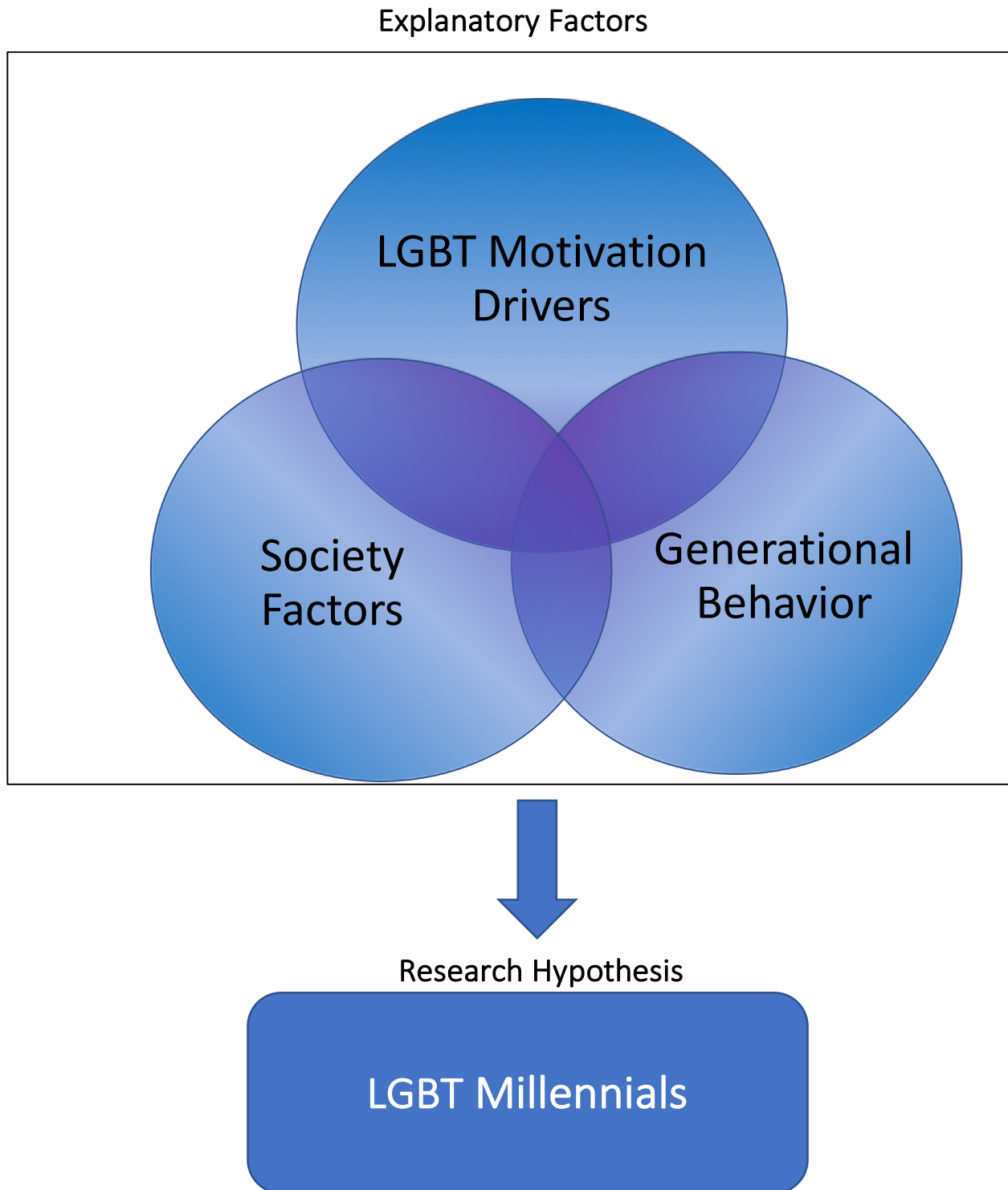
Figure 1 – Literature Map



Source: Own

2.3. Conceptual Framework

Figure 2: Conceptual Framework



Source: Own

3. Methods

3.1. Overall Research Design

In order to carry out this research regarding LGBT Millennials, the paper has been developed from a phenomenological point of view. As the research objective was to examine these behaviors, a phenomenology is the most suitable type of research philosophy. Additionally, this type of philosophy supports multiple methods of data collection from smaller sample sizes which is what suits this very type of research the best (Altinay, 2008 p. 69-72).

Furthermore, as this research is examining human behavior in certain events/activities, in this case LGBT Millennials when travelling, a deduction as research approach have been chosen where the research is based on a theory/hypothesis. In this case the theory/hypothesis presented is that LGBT Millennials is a niche market of their own and therefore differs from both regular LGBT and Millennial travelers. From there the hypothesis is expressed and put it into context by testing. After having done necessary observation and data collection it was examined and if necessary, modification of the theory based on the findings (Altinay, 2008 p. 72-74).

When it comes to strategy choice, a quantitative approach has been used as a way of undertaking this research. This consists of descriptive surveys and therefore, a *survey research* as strategy was chosen which has guided the way while doing conducting the research investigation (Altinay, 2008 p. 82-83). Since the research's topic is directly related to hospitality and a specific group of large sizes, a research was highly relevant as it helped to discover, examine and analyze the LGBT Millennials attitudes, consumer behaviors and preferences when travelling. The survey was determined to include both *descriptive* and *analytic* data sets in order to perform a comparison of the LGBT Millennial phenomenon and LGBT Non-Millennials in terms of their behavior explored within a "real life" context (Altinay, 2008 p. 77-78).

3.2. Data Collection Techniques and Research Instruments

Firstly, there was a data collection from the descriptive surveys in form of questionnaires which provided large data sets from the LGBT individuals' point of view. The descriptive surveys undoubtedly helped in reaching a group of larger sizes in order to detect tendencies and general perceptions and put together with an analytic survey they provided valuable information (Altinay, 2008 p. 121-122). This data was analyzed in order to provide a deep analyzation of the hypotheses and get a good understanding between LGBT Millennials and their consumer behavior in the travel industry (both when booking, during the stay, and after ended trip (Altinay, 2008 p. 107).

3.3. Research Context and Participants

Taking advantage of own personal network of both LGBT Millennials and LGBT Non-Millennials it was planned to carry out descriptive surveys providing both descriptive and analytic data through 110 questionnaires with multiple choice questions. They were distributed to achieve around 70% will be of LGBT Millennials and 30% LGBT Non-Millennials. For the questionnaires, a *Snowball* sampling has been used, where the respondents were asked to refer individuals fitting into the category LGBT just like themselves. With the collected information, an analysis of the data was performed in order to scrutinize, distinguish and identify findings. Eventually, the collected research information and its presented findings were used to determine if the LGBT Millennials phenomenon is occurring as expected according to experts and other literature on this subject.

3.4. Data Analysis

Over the past 3 months a data collection from individuals using Qualtrics Software Tools & Solutions has been used, providing a detailed and precise measurement of travel behavior in relation with LGBT tourism. The data collected provides an opportunity to detect and identify the LGBT Millennials' consumer behavior using certain indicators and variables related to decision making and behavior when traveling. The data collected

gives an opportunity to determine if there is any evidence of a shift in travel behavior among the LGBT segment while linking it to the generational change that society is currently seeing. Given the previous discussion in this research, the potential is that the data will show what experts and other professionals in the industry have been predicting. Indeed, one would look for evidence that sexual orientation becomes steadily less important in terms of decision making when traveling, and that the LGBT reputation in a destination or establishment is losing its power as a travel motivation and driver.

The questionnaire undertaken, investigates the respondents' travel behavior, preferences and personal motivations linked together with socio-demographic characteristics such as age. This linkage helps to determine whether their generational belonging affects their perception of LGBT destinations and accommodations as well as their travel behavior. In order to measure the questionnaires' various elements of travel behavior, personal preferences and motivations, a series of different types of variables measured using different scales have been used.

One of the scales used is *nominal* in order to "illustrate the key characteristics of objects or individuals..." (Altinay, 2008), helping me to assign and aggregate other variables later, allowing categorization and grouping according to the results. The nominal scale in this report is used to determine the respondent's age, as this plays a key role in the investigation of generational changes.

Further into the investigation an *ordinal* type of scale has been included, allowing an illustration of "the importance attached or preference for certain variables; categorizes the variables in such a way as to denote differences among the various categories; rank-order the categories in a meaningful way" (Altinay, 2008). This is exactly what is needed for the in-depth analysis of the LGBT Millennial's travel behavior and preferences, denoting such among the earlier generations. Examples of use of this type of scale are seen in questions such as ranking of important factors in a destination or an

accommodation, travel motivations upon vacation choice, importance of sexuality in relation with travel choices and so on. Such information opens up for assumptions of how businesses targeting LGBT tourism, such as hotels and travel agencies, should design their travel packages and products in the future.

In this report, there is also used an *interval* kind of scale, giving the opportunity to rank the "... individuals with numbers indicating same intervals; allows measurement of the distance between any two points on the scale. In this study, a five-point Likert scale has been used as a measurement of the respondent's opinion on certain topics regarding travel linked to sexuality.

Lastly, this study also includes a *ratio* type of scale, making it possible to classify absolute values and size of the respondents, such as number of times they travel during a year, travel expenditure, frequency of travels in purpose of an LGBT event and so on.

This research reports on preliminary findings that uses data from a panel of 100 individuals who participated via Qualtrics. In the research to date, the survey investigates LGBT individuals mostly, but not exclusively, within the Millennials generation's age spectrum (18 – 34 years). LGBT individuals from earlier generations have been included as a smaller data set, providing data that expectantly will confirm findings already determined in well-established findings in former literature. The use of both data sets is giving the opportunity to determine, whether or not, there exists any evidence of on-going disruptions in travel behavior comparing the LGBT Millennials with LGBT individuals from previous generations.

3.5. Ethical Considerations

As according to Meezan and Martin (2003), the topic on ethical consideration is especially important when the study investigates stigmatized and more vulnerable populations such as LGBT individuals. This may require showing extra caution when consulting these individuals

and conducting the investigation. Based on these aspects and consideration I have decided to carry out anonymous surveys featuring questionnaires online in order to protect the respondents from any harm of any kind.

There are also some issues and considerations to be taken regarding the research sample and methods used. Many earlier researchers reporting on gay issues focused only on gay men and lesbians which was “artificial and misleading...and has the effect of diluting our understanding of each and trivializing the experience of both” (Wahler & Gabbay, 1997. p 2). The LGBT community consists of a vast array of heterogeneous communities and subcategories, among which many are overlapping each other. That said, knowing that the LGBT spectrum is so diverse, a generalization may be “a dangerous and misguided enterprise” (Nardi, 1999, p. 96) as it can generate results that are too simplistic and vague for a whole group to represent. Therefore, I have assured completely awareness on these topics and avoid ignoring any type of identities within the community.

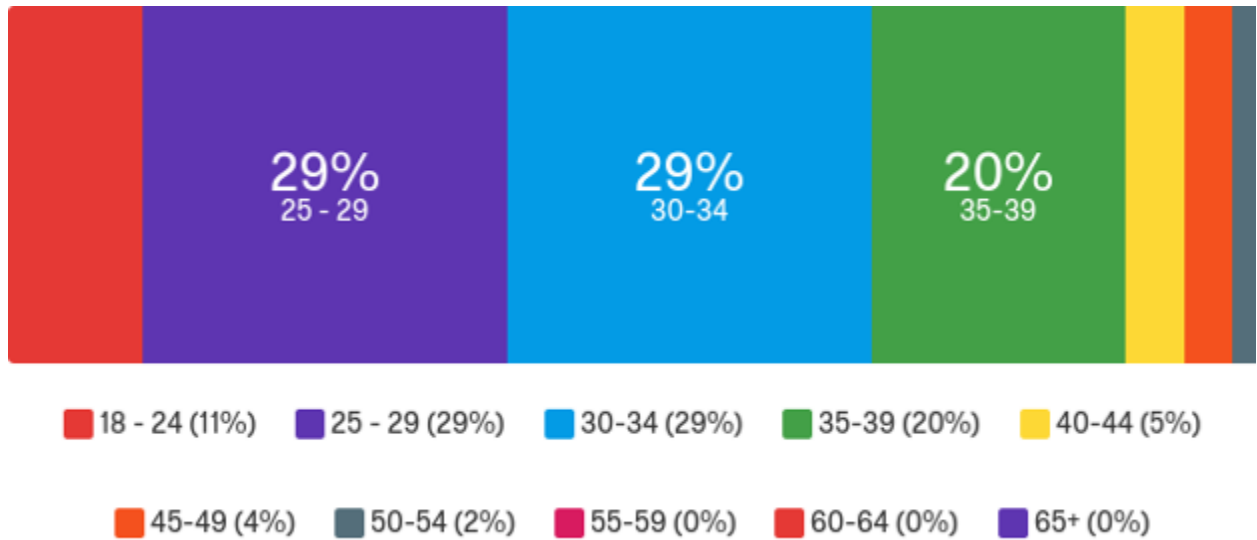
As discussed in 3.3 Research Context and Participants, I have used a Snowball type of sampling asking the respondents to refer individuals alike. The methodological issue here is that it relies heavily on personal social networks, depending indirectly on the researcher’s own relation to the LGBT community. This might be an issue regarding the desire of having a 100% credible and representative sample of the LGBT community due to these aspects and the nature of the sampling technique. Therefore, as of the conduct of this study I have considered that there might be a certain level of limitation in a true representation of the whole LGBT population, because of a possible over-reliance of certain population groups with similar social background and social network belonging.

4. Findings and Discussions

4.1. Questionnaires

The first question of the questionnaire is based on a key characteristic, the respondents’ age, in order to classify them between the Millennial generation and earlier generations as the research question of this study proposes.

Figure 3: Q1 - Age

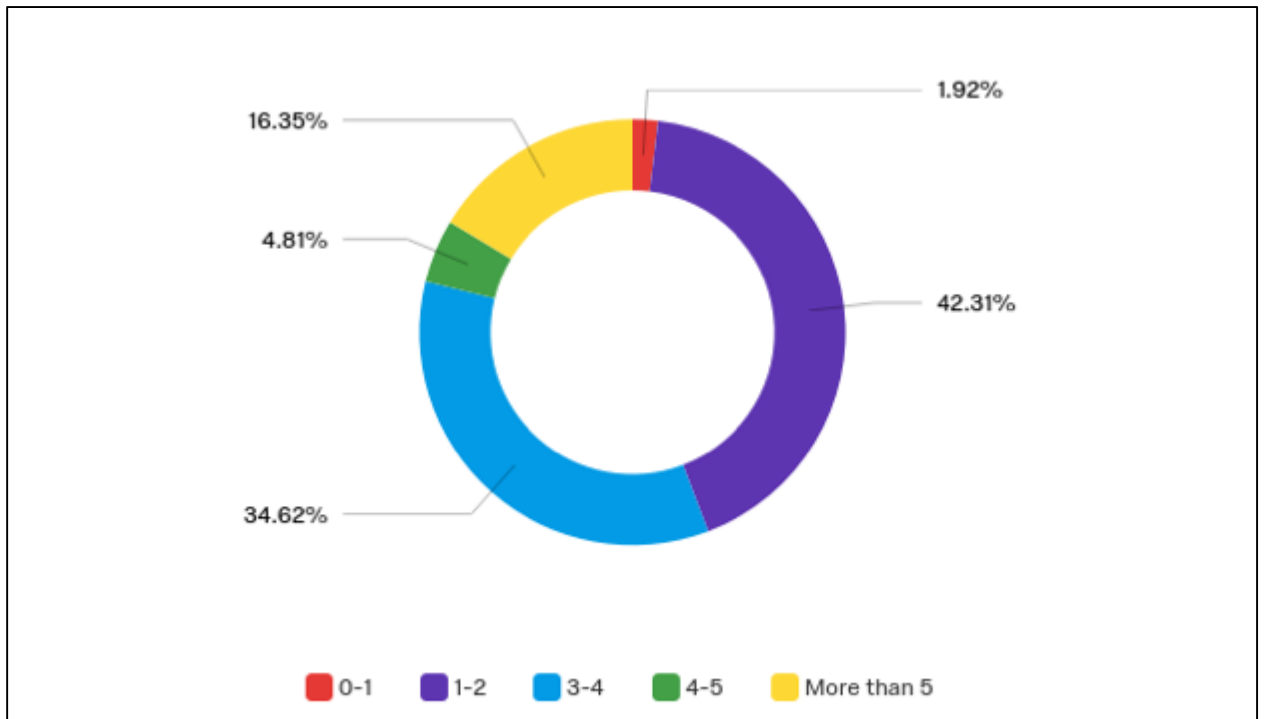


Source: Own

The respondents' age varies mostly between 25-39 years with a slightly bigger percentage on the lower end of the scale with respectively 28% for 25-29 as well as 30-34. Due to the questionnaire's nature targeting Millennials (18-34 approx.), the main group among the participants are under 35 years old with a total of 67%. Earlier generations represent 32% of the respondents and the remaining 1% is blank answer.

The following question investigates the respondents' frequency when it comes to traveling on an average during a calendar year. The respondents were given frequency ranges of 1 unit up to 5, then 5 and above

Figure 4: Q2 – On an average, how many leisure trips do you make a year?

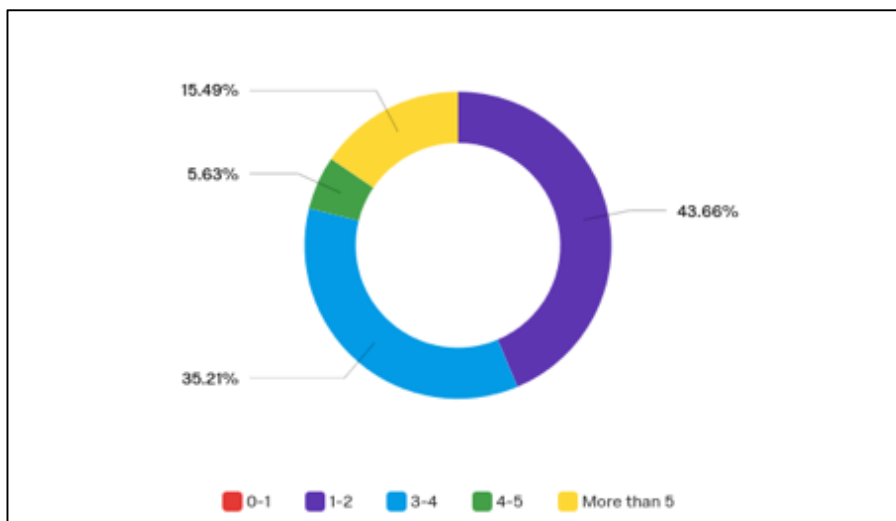


Source: Own

As seen in Figure 2, the percentages suggest that a majority of 43% of the respondents complete 1-2 leisure trips a year on an average. The next main group are the ones who reported an average of 3-4 leisure trips a year, representing a total of 34% of the respondents. An examination of the data also showed that a remarkable 16% of the survey group reports that they make more than 5 trips a year.

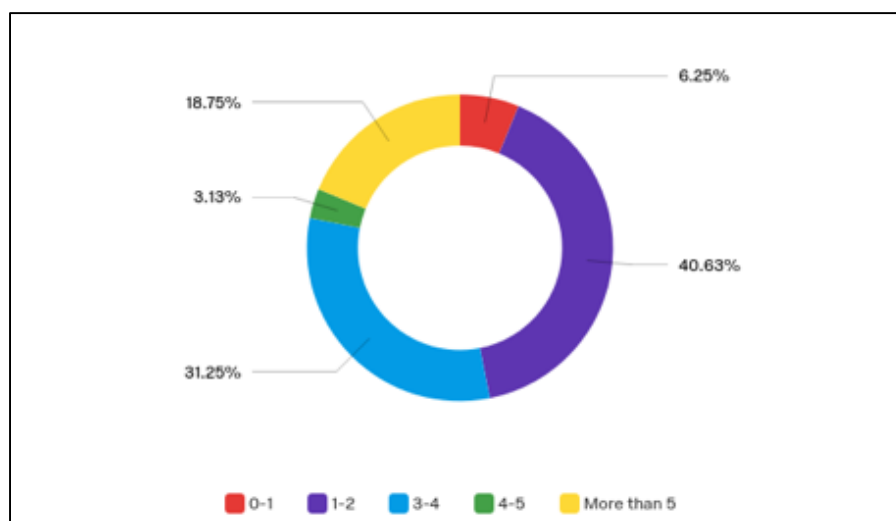
Because this report's objective is to investigate the differences, or similarities, between consumer groups based on generations, a combination of various age groups have been put together and divided in two groups. As this questionnaire targets Millennials in particular, the first group consists of the respondents reporting their age to be between 18 and 34. The second group represents the earlier generations with a reported age of 35 and above.

Figure 5: Q2 – Millennials



Source: Own

Figure 6: Q2 – Earlier Generations (Baby Boomers & Gen X)

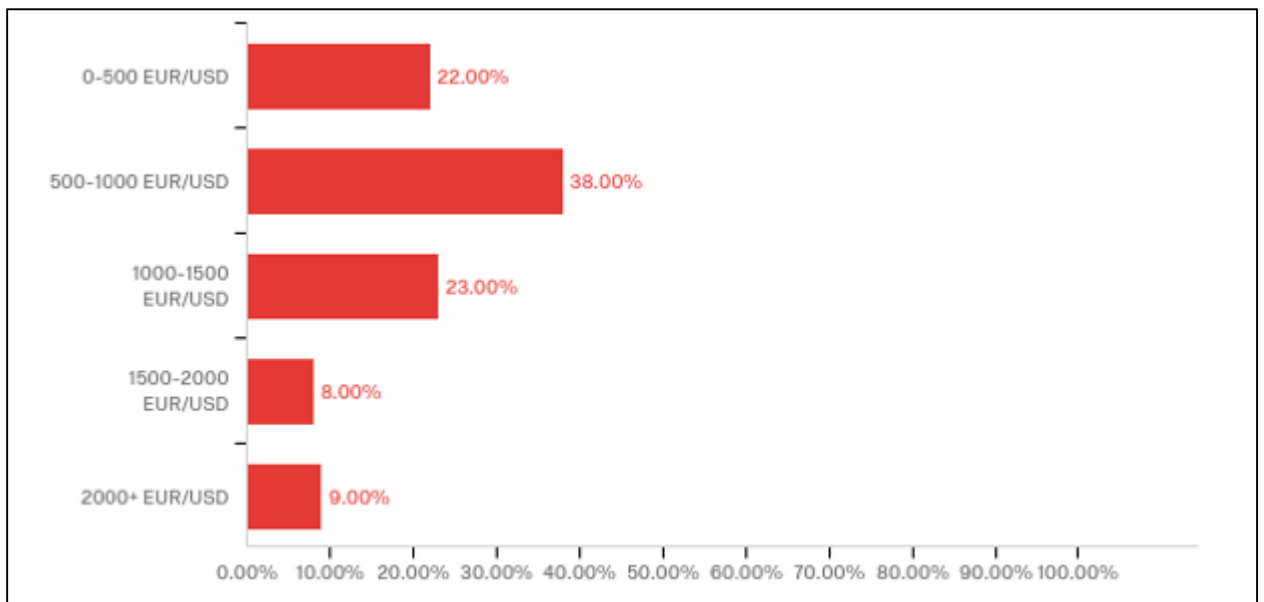


Source: Own

In Figure 3, analyzing the same frequency data from Figure 2 and aggregating the age variable from Figure 1, it shows us that the majority of Millennials, 56%, report that they are frequent travelers with more than 3 leisure trips a year. A comparison of this data with the data presented in Figure 4 shows that earlier generations travel less frequently with 55% reporting that they travel *less* than 3 times. As proposed by previous literature,

this value is within expectations of Millennials suggested to be a “...generation of natural travelers.” (Barton et.al., 2013).

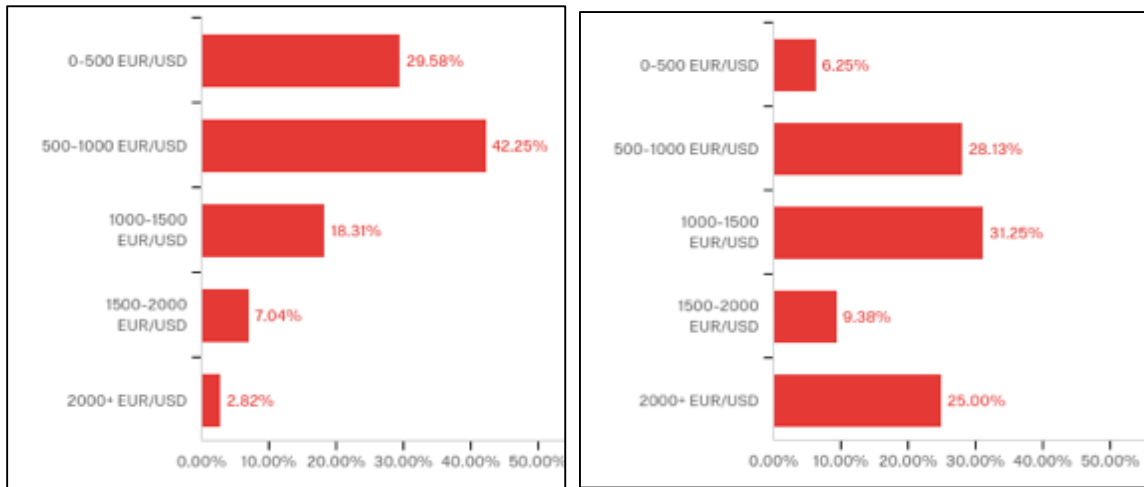
Figure 7: Q3 – On an average, approximately how much do you spend on a leisure trip (tickets/accommodation included)?



Source: Own

In the next question, the respondents were asked to report their average travel expenditure, including transportation tickets and accommodation. There was a majority of 38% stating they usually spend between 500-1000 EUR/USD for each trip made. The next two most remarkable groups are the shoulder groups of 0-500 and 1000-15000 EUR/USD, each with respectively 22 and 23% represented.

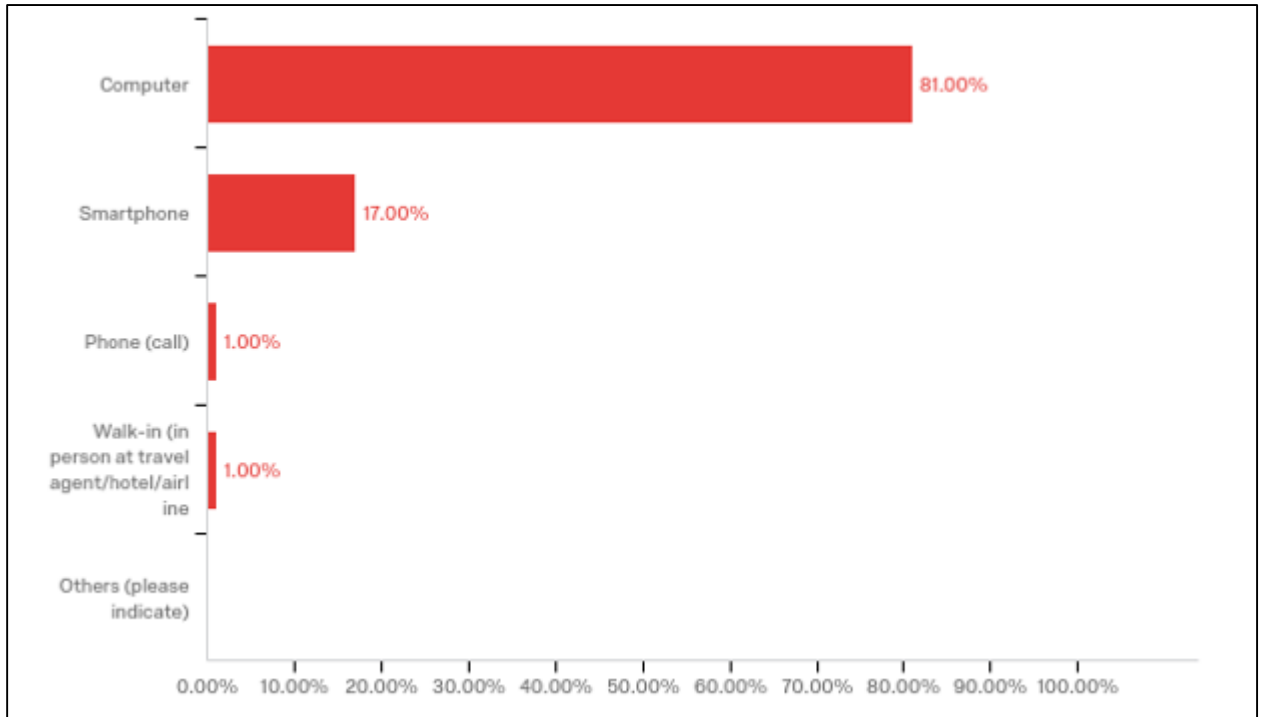
Figure 8: Q3 – Millennials vs. Earlier Generations (Baby Boomers & Gen X)



Source: Own

Again, comparing the Millennials and earlier generations by aggregating the demographic data from Figure 1, it shows us that despite the heavy discussions about Millennials importance, they are still, according to Business Professional Women’s Foundation (2011), per date “in their late teens or early 20’s” which is why their travel expenditure keeps staying relatively low compared to their precedent generations. As seen in Figure 6, the results are as expected showing us that the earlier generations are spending drastically more when traveling than Millennials. The data suggests that a remarkable 27,27% of earlier generations spend more than 2000 EUR/USD per trip, while only a 1,49% of Millennials does the same. An important detail is also that the Millennial generation has a vast majority of 71,6% reporting that they spend 1000 EUR/USD or less. As of the other generations, this number is almost half with only 36,4% stating the same. That said, the results are within expectations as earlier generations still possess a higher purchasing power than the Millennials as they “...are gradually and steadily stepping into their golden years in terms of consumption and earnings.” (Business and Professional Women’s Foundation, 2011).

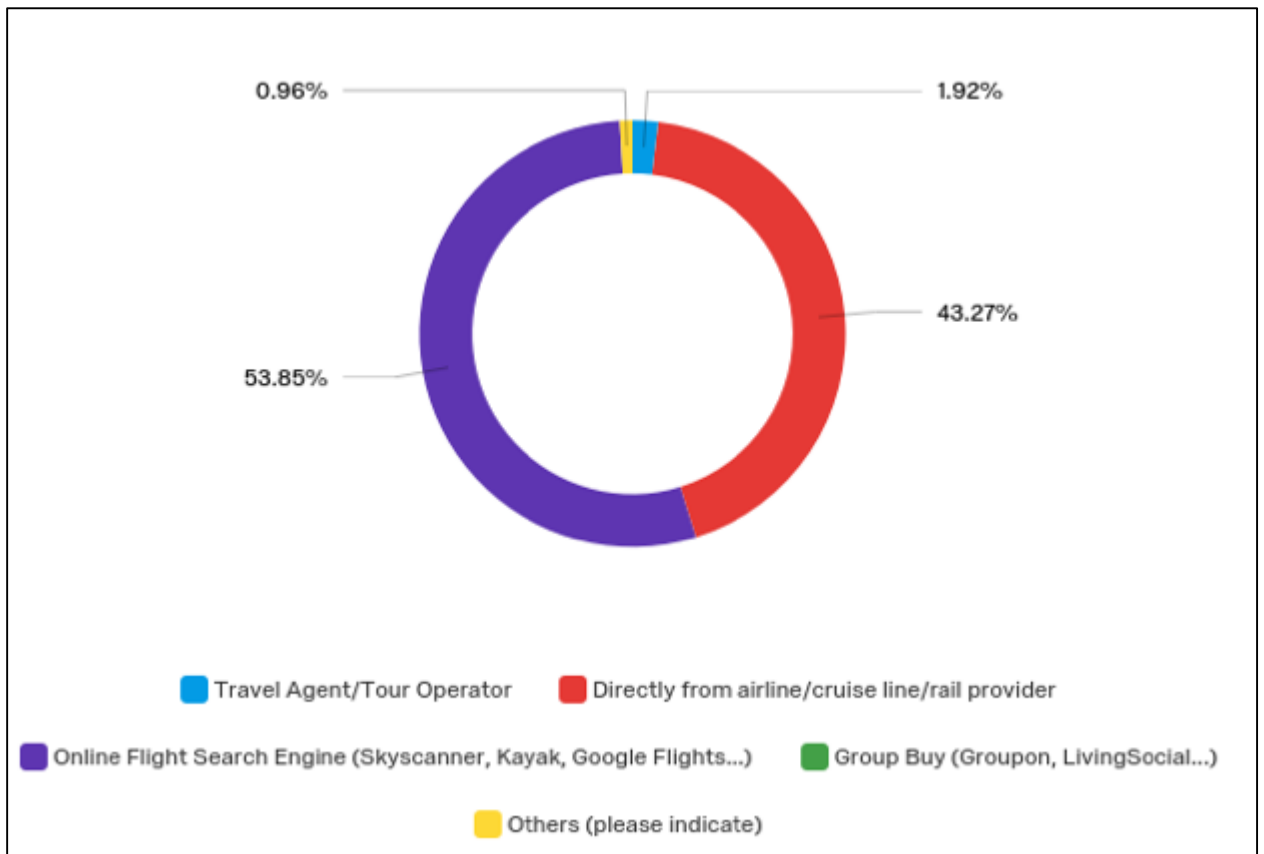
Figure 9: Q4 - Q4 - How do you prefer to book your trip?



Source: Own

In the next question, personal preferences among the respondents were measured as of methods of booking their trips. As expected, due to a more and more modernized society with technology integrated in people's lives, 81% of the respondents reported that they prefer to book their trips using a computer while 17% stated they preferred to do it via their smartphone. In this data set, there were no clear indications of differences between the two generation groups.

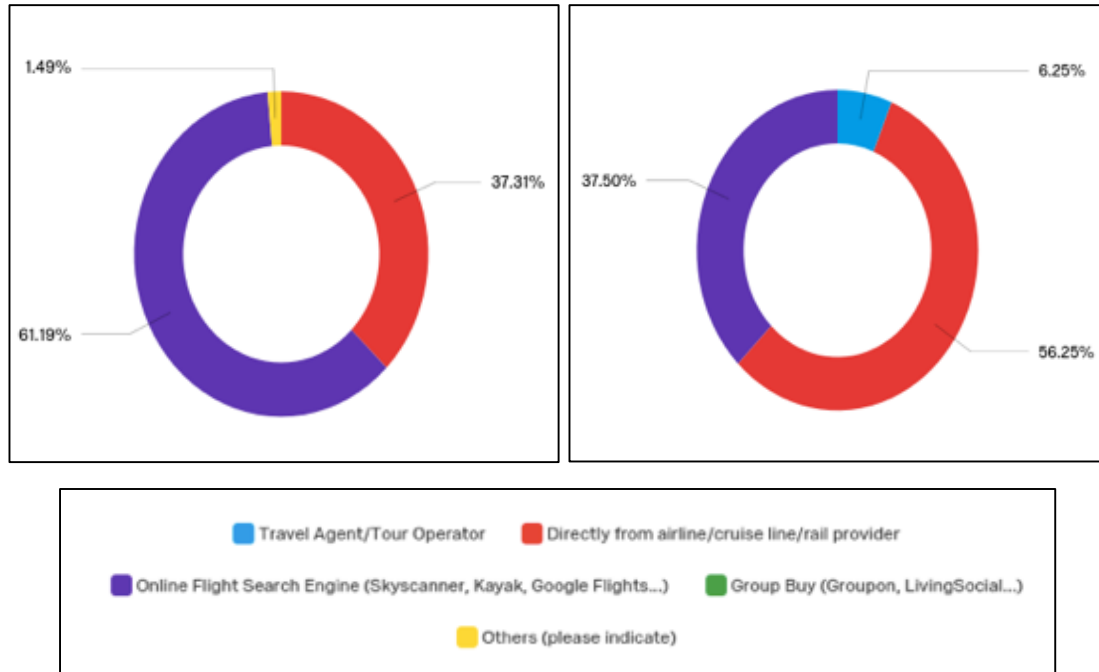
Figure 10: Q5 – Booking your tickets, from whom do you prefer to buy from?



Source: Own

In the next data set, the respondents were asked to indicate their most preferable sales point when booking plane, cruise or train tickets. The data in Figure 8 shows that there is a slight majority who prefers using Online Flight Search Engines (OTAs) representing 53,85% of the survey group with direct sale from provider being the next main choice with a 43,27% support. Analyzing an comparison between Millennials and Earlier Generations, it shows us that, as proposed by numerous previous authors, the Millennial generation differentiate themselves from earlier generations "...especially in terms of purchasing process and use of new technology, both before, during and after ended vacation or trip..." (Barton et.al., 2013).

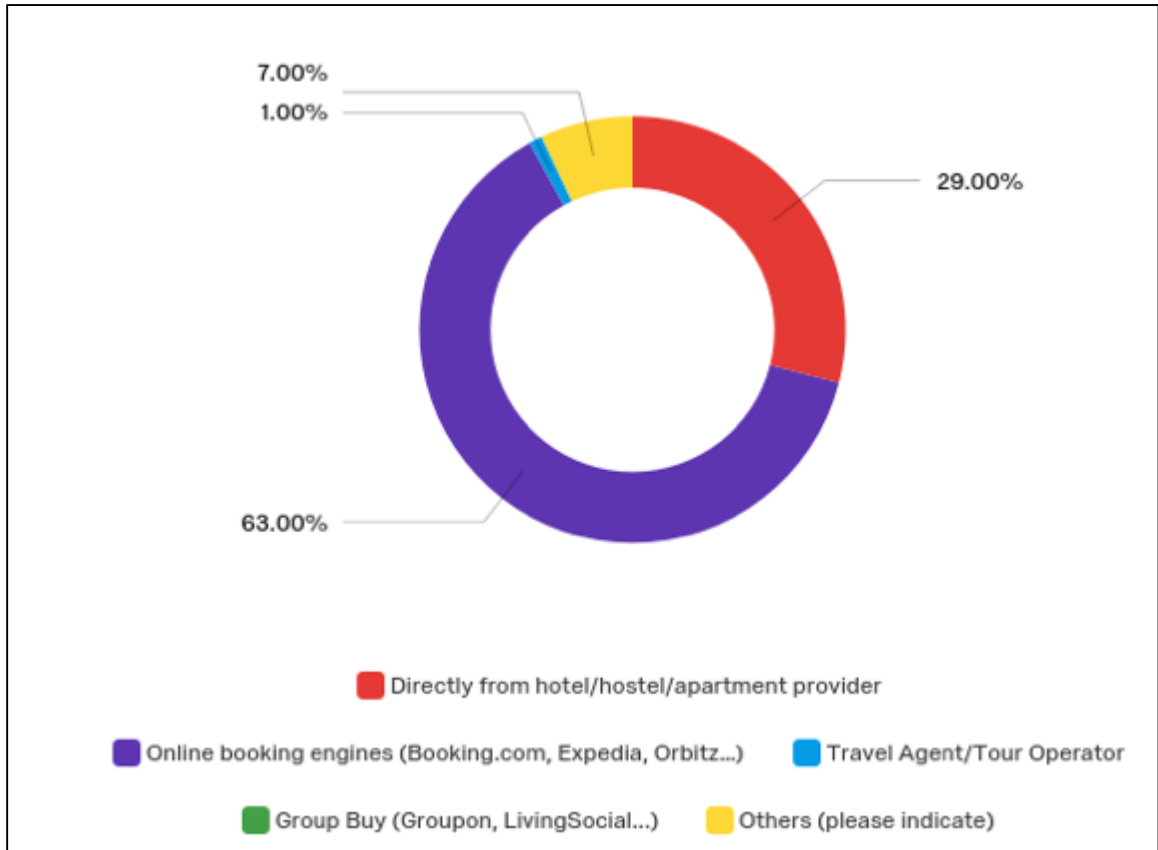
Figure 11: Q5 – Millennials vs. Earlier Generations (Baby Boomers & Gen X)



Source: Own

As seen above in Figure 9, a vast majority of 61,19% of the Millennials prefer using OTAs while only 37,50% of the earlier generations do the same. The difference lies in the use of traditional channels such as travel agents and tour operators where a slight percentage of 18,18% of the earlier generations group report they are still using them. Oppositely, none of the Millennials respondents report the same.

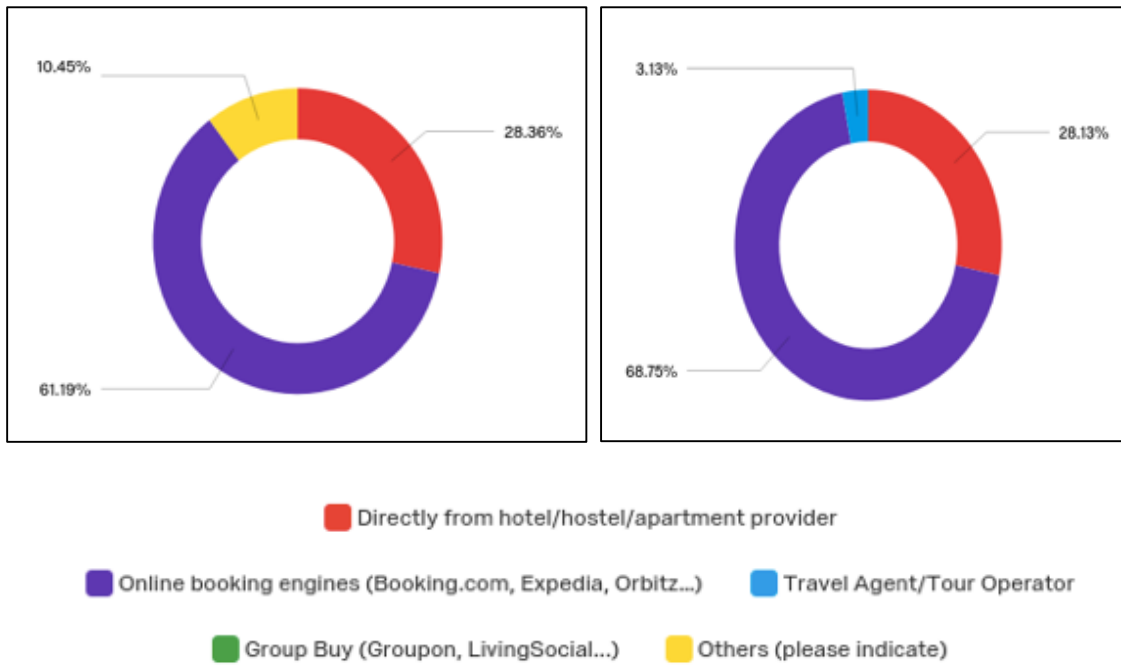
Figure 12: Q6 - Booking accommodation, from whom do you prefer to buy from?



Source: Own

The proceeding question keeps the nature of the previous, asking now the respondents to indicate their preference in terms of sales channels when booking accommodation. Figure 10 shows that an even bigger majority of the total survey group state that OTAs is the most preferable channel. Next up is directly from the provider with 29%, followed by a group of 7% reporting “Others”. This is where the two generation groups differentiate themselves again.

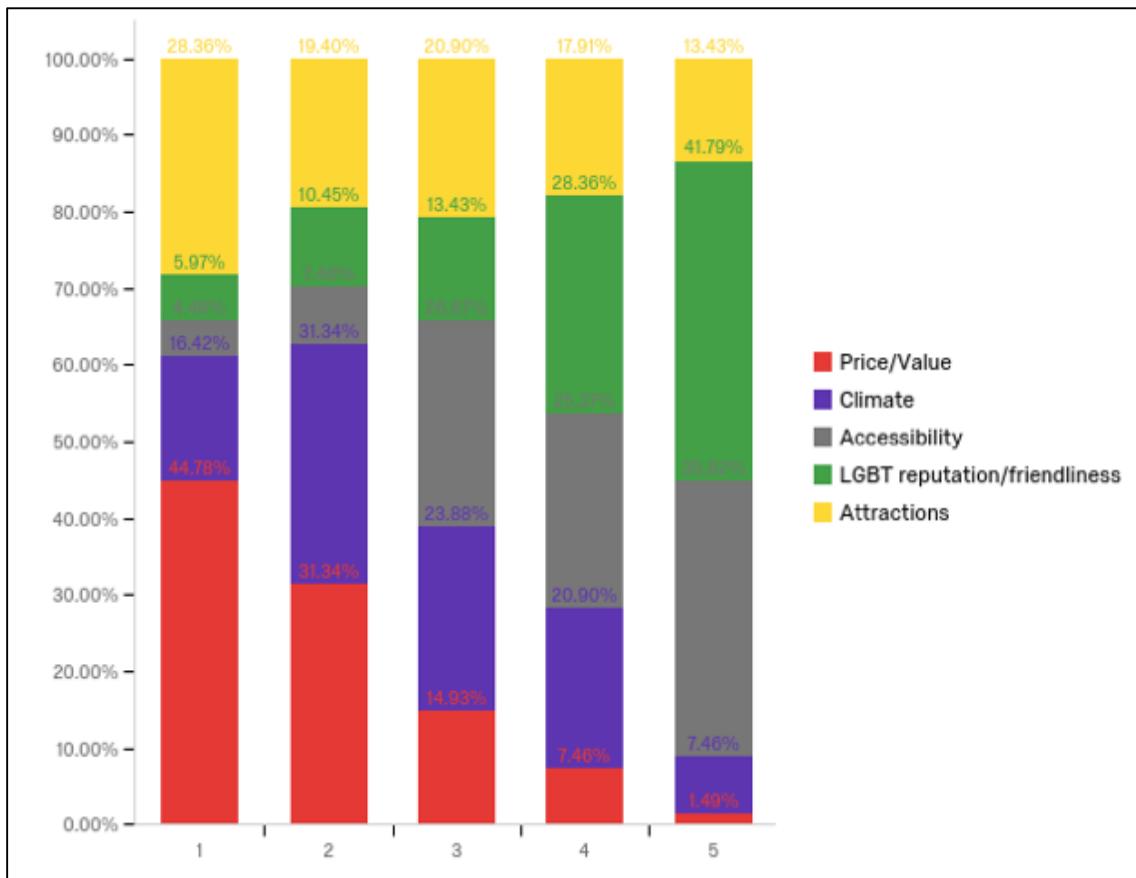
Figure 13: Q6 – Millennials vs. Earlier Generations (Baby Boomers & Gen X)



Source: Own

Figure 11 shows that even though the two generations share the behavior of using OTA’s heavily as opposed to the previous question, the Millennials have indicated a separate sales channel, namely Airbnb. All of the respondents choosing the option ‘Others’, except one, suggested Airbnb as their preference. The results suggest the same type of behavior as proposed by previous literature such as Airbnb (2016) stated in their own study, stating that “Millennials have shown to be attracted towards new and unfamiliar places that can generate an adventurous, local and personal experience” (Airbnb, 2016).

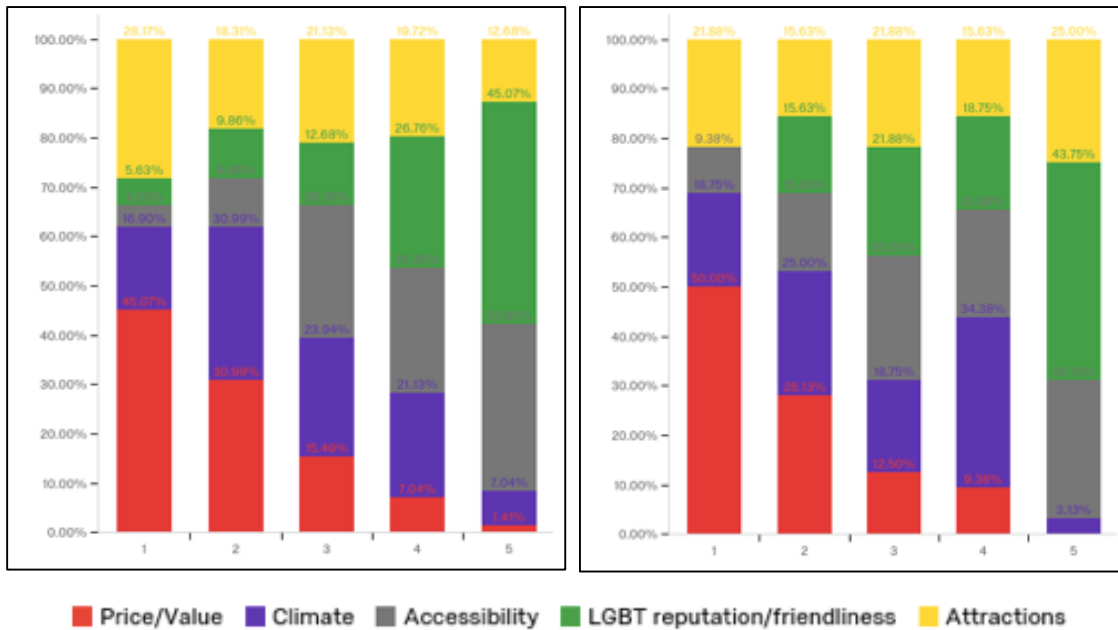
Figure 14: Q7 - What factors do you find the most important upon destination choice?



Source: Own

The next figure shows a data set investigating the respondents' personal motivations in terms of destination choice. The options were asked to be ranked from 1-5, 1 being the most important factor. The results give a clear indication that LGBT reputation/friendliness is weakest driver, representing 35,82% of the respondents who ranked this factor as the least important. On the other side of the scale the data suggest that Price/Value scores the highest in terms of importance with 44,78% of the respondents reporting this as their strongest motivation.

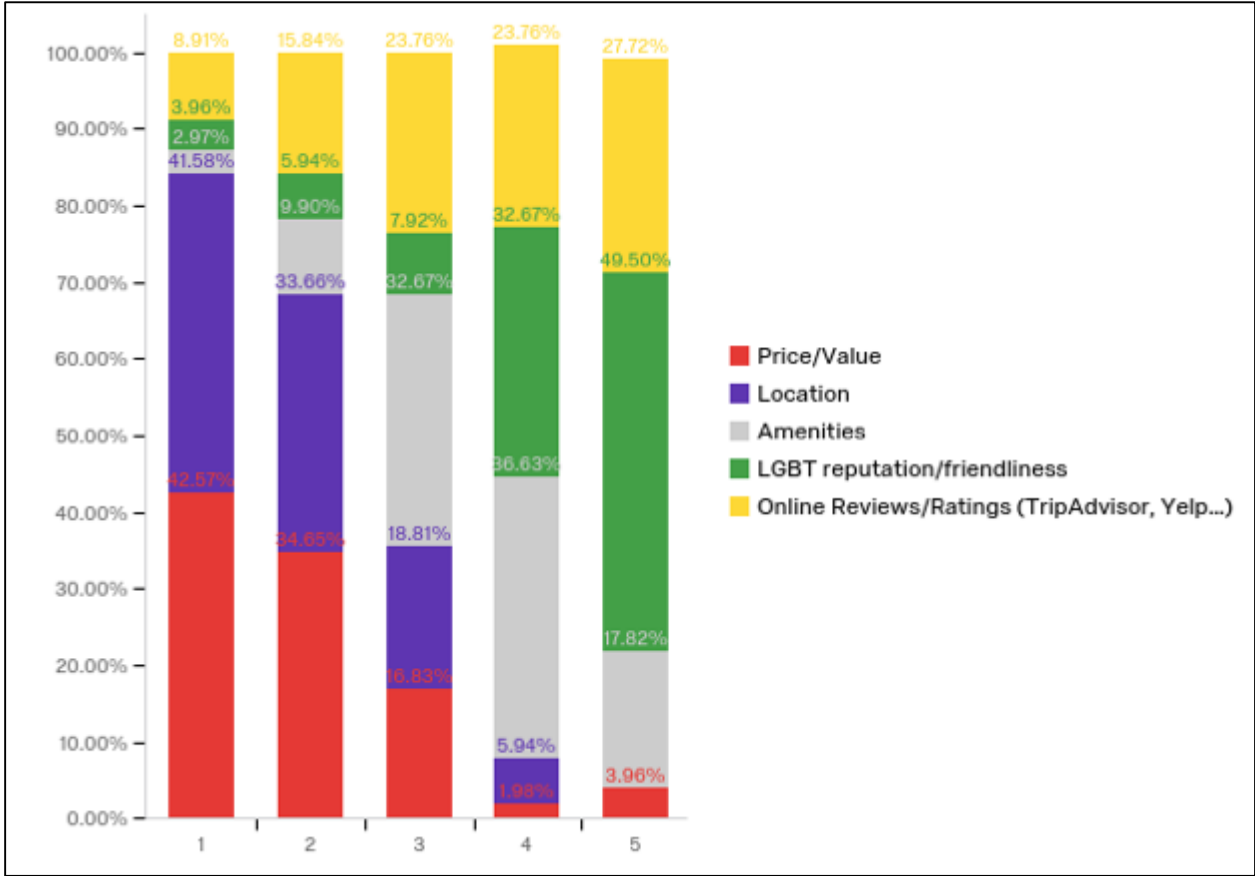
Figure 15: Q7 – Millennials vs. Earlier Generations (Baby Boomers & Gen X)



Source: Own

Figure 13 shows us the previous data set combined with the demographic variable and by analyzing the two data sets together, it is possible to investigate if there is any evidence of generational differences related to sexuality and its importance in the travel space. The results show some differences at a first sight and the percentages are definitely subject to assumptions on the topic. Overall, after examining closely the results from Millennials as of ranking LGBT reputation/friendliness are quite different from those of earlier generations. There is a somewhat clear indication, that a significant lower amount of Millennials than earlier generations ranked LGBT Reputation/Friendliness as their 3rd, 2nd or 1st most important factor. Looking at both data sets, it shows that there is a deviation between the two generations of 9.34 % in this matter, with respectively 28,17 & 37,51% ranking this factor as 3rd, 2nd or 1st.

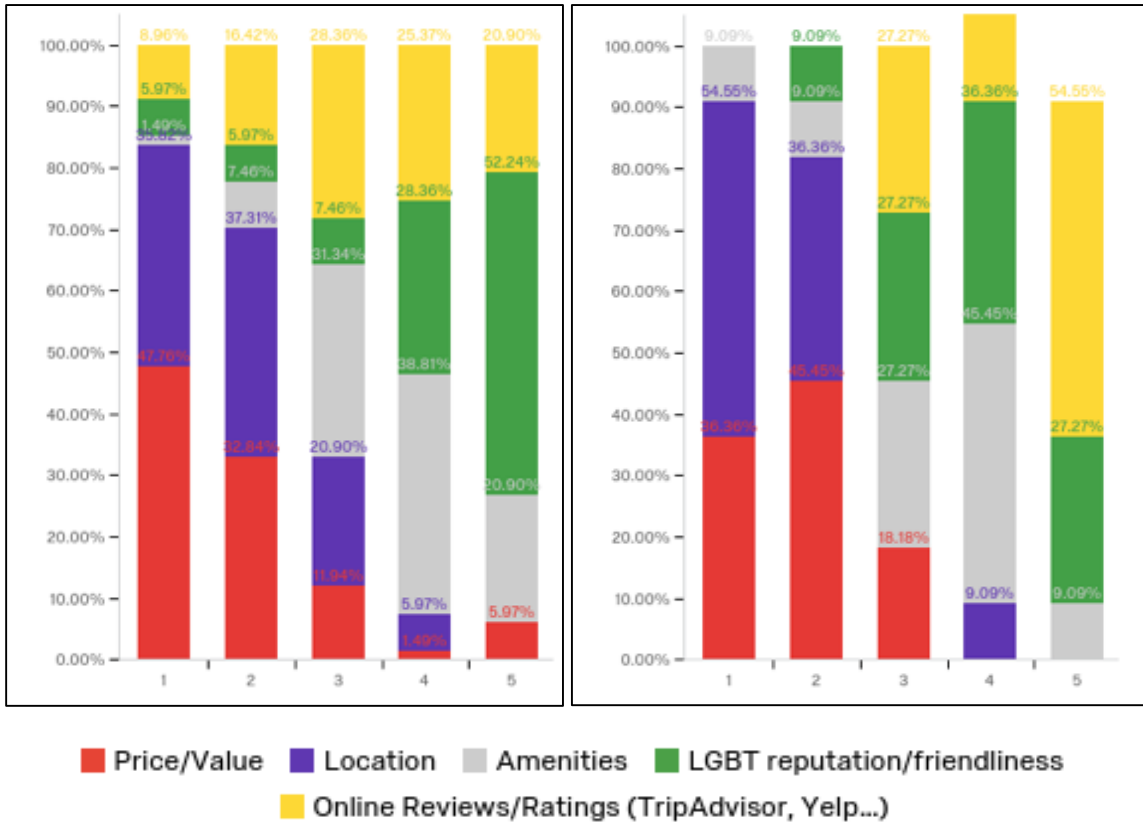
Figure 16: Q8 - What factors do you find the most important when choosing your accommodation?



Source: Own

This following data set shown in Figure 13, examines the order of preference in terms of accommodation choice and gives a clear indication of the tendency in the survey group as a whole. The tendency suggests that while Price/Value and Location, representing respectively 42,57% and 41,58%, are reported the strongest drivers, LGBT reputation/friendliness scores as the least important seen from a global perspective, with 49,50% of the respondents ranking it as the weakest motivation.

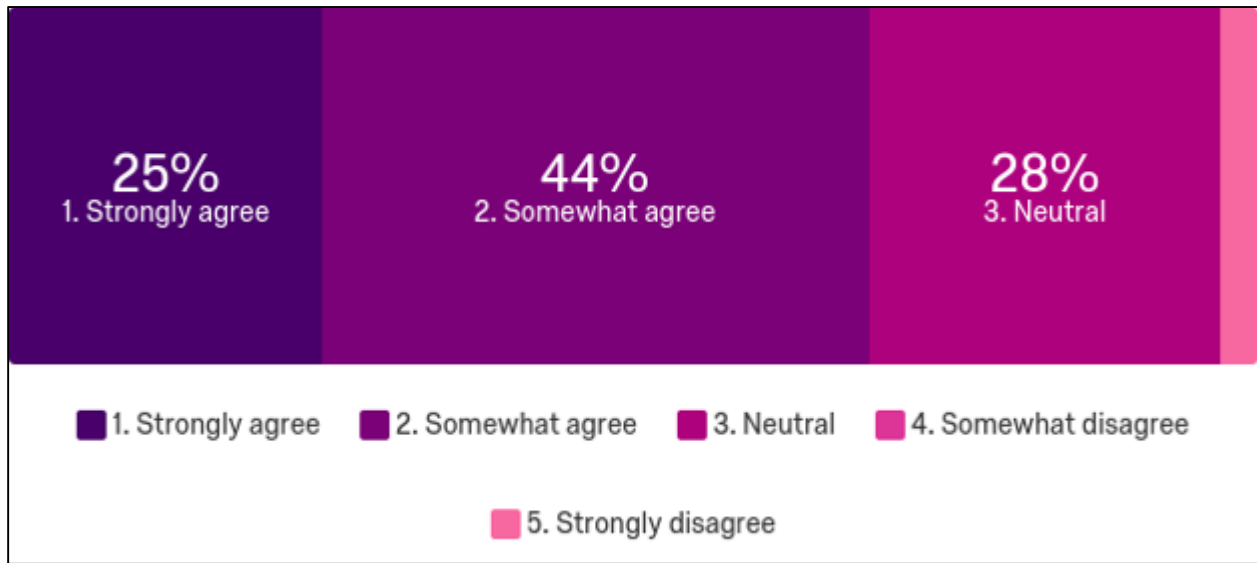
Figure 17: Q8 – Millennials vs. Earlier Generations (Baby Boomers & Gen X)



Source: Own

Scrutinizing the previous data set from Figure 13 aggregated with the age groups, it again shows a modest but clear indication of differences between the two generation groups. Similar to the results from question 7, the Millennials ranked LGBT reputation/friendliness as the weakest driver in terms of accommodation choice when compared to earlier generations. Analyzing the number of respondents who ranked this factor as their 3rd, 2nd or 1st most important motivation, it shows a representation of 19,4% among Millennials and 36,79% among earlier generation, a deviation of 17,39%.

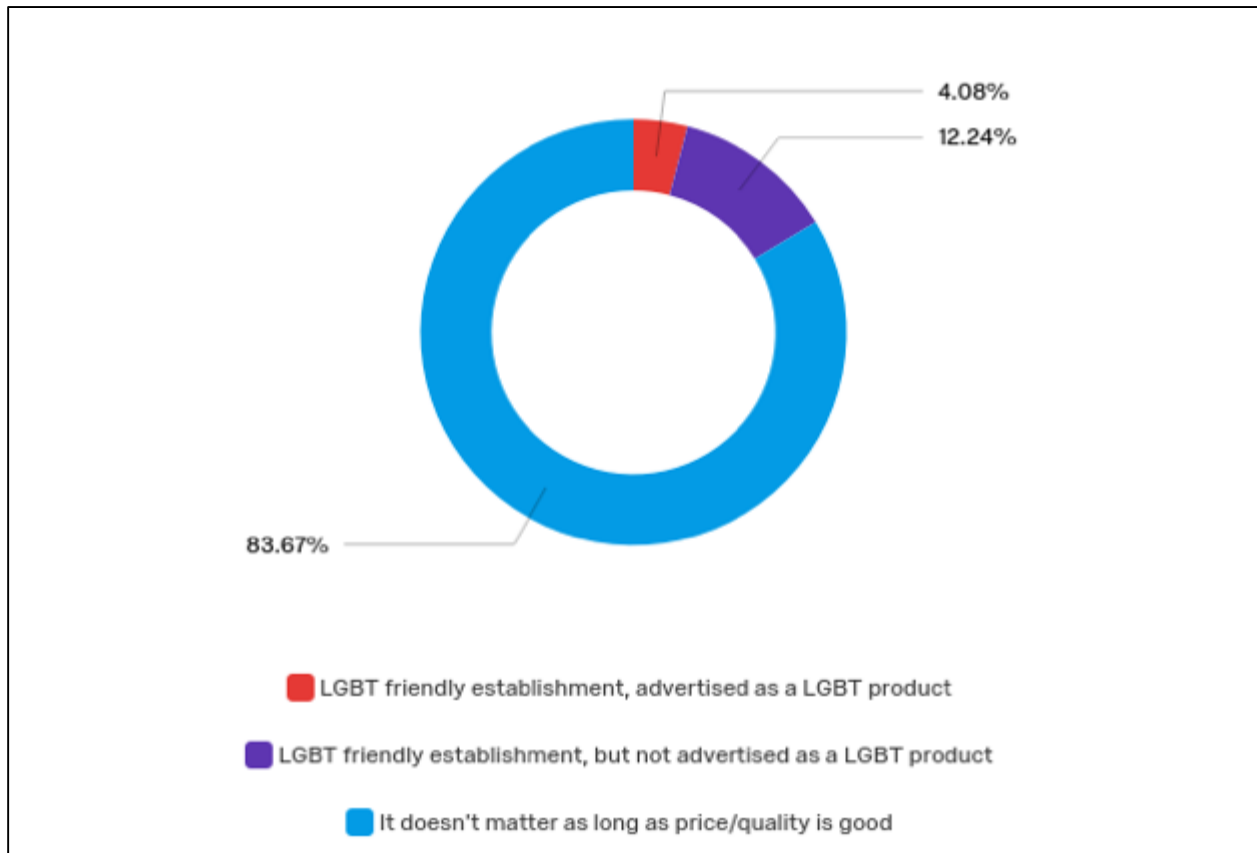
Figure 18: Q9 – Social media’s influence



Source: Own

This next dataset, as seen in Figure 16, scrutinizes the respondent’s own perception of social media’s influence on them when making vacation choices such as accommodation or destination. The results show, expectedly, that the majority of the respondents, 69% to be exact, report that they either Somewhat or Strongly agree to whether or not they are likely to book a trip or accommodation after hearing about it via social media. This is in accordance to what previous authors have commented on this very topic, regarding Millennials and their heavy use of new technology and social media in their daily lives. As the research company Edelman reported in a study from 2013, naming the Millennials as “the first wholly digital generation, representing individuals who were born into a world with internet and mobile phones” (Edelman, 2013).

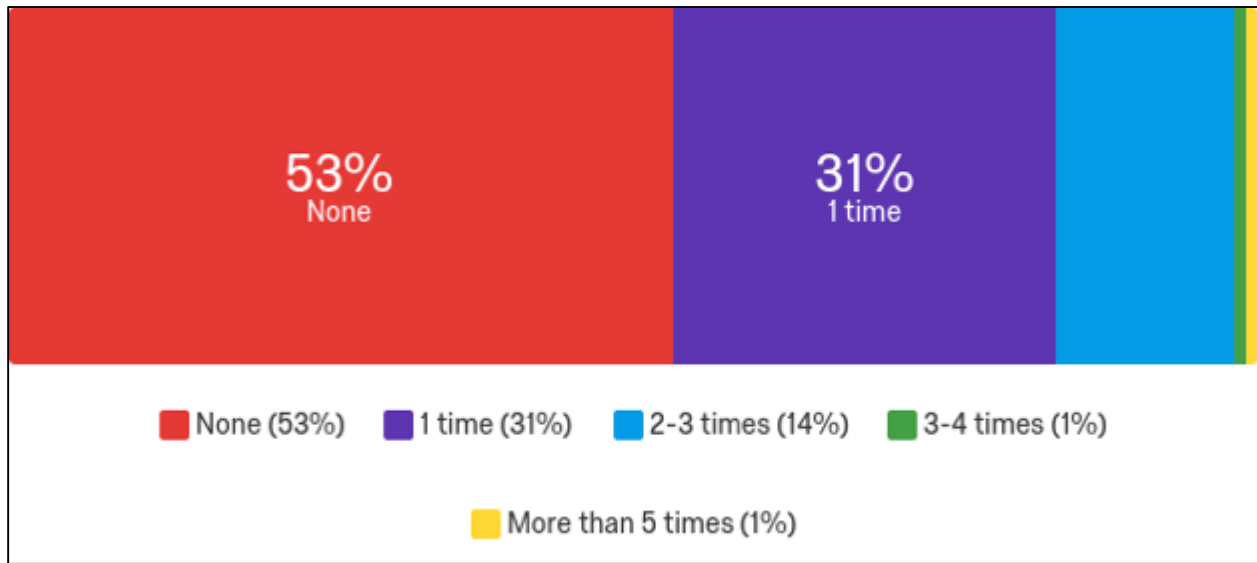
Figure 19: Q10 – Preference of type of accommodation



Source: Own

This next question measures whether the respondents prefer a LGBT friendly establishment or if price-quality relation plays a more important role prior to the booking. The data shows a clear indication, that their decision of where to stay is in almost all cases impacted the most by its price linked to quality. The respondents show little interest in seeking LGBT friendly establishments, whether or not they are advertised as such.

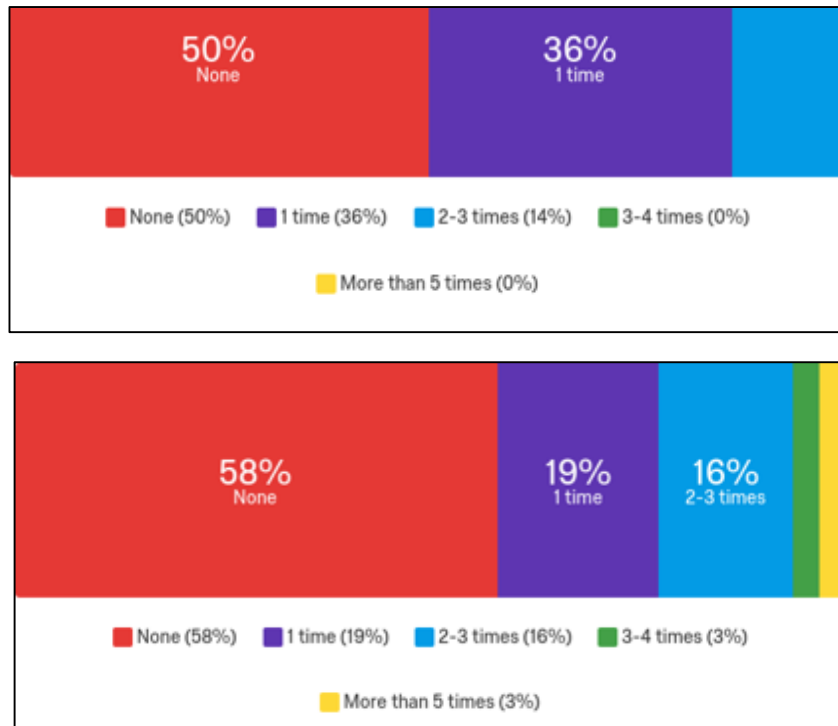
Figure 20: Q11 – Travel in purpose of a LGBT event



Source: Own

In Figure 16 we can see the next analysis, reporting a slight majority of 53% who have never traveled in purpose of a LGBT related event, that is festivals, concerts, pride... In the next step of the analysis, the demographic variable was plotted for the results in the data set. The results in relation to generations are shown in Figure 17 below:

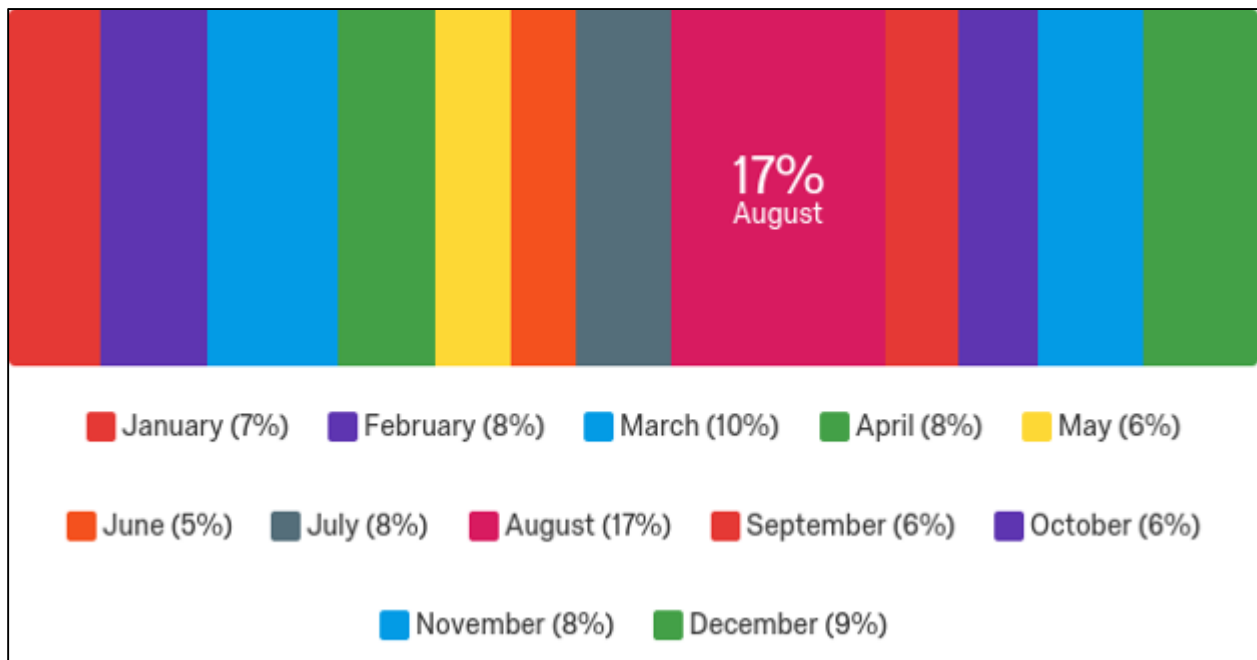
Figure 21: Q11 – Millennials (above) vs. Earlier Generations (Gen X)



Source: Own

Figure 18 show vague, but important, differences between the two generations, suggesting that a slightly higher percentage of Millennials are likely to travel for events related made for and/or by the LGBT community. The respondents from the Millennials' group suggest a total of 50% who have traveled 1 times or more, a value that in the group of earlier generations shows to be 43%, in other words a deviation of 7% between the two.

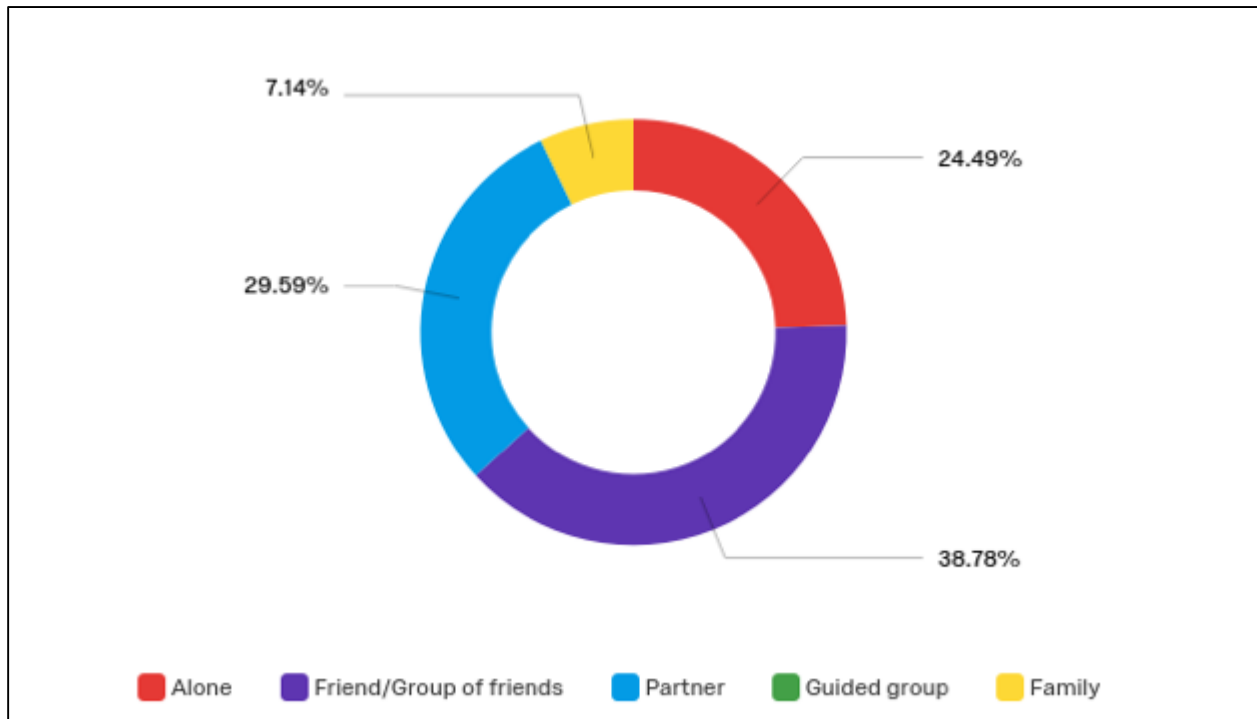
Figure 22: Q12 – When the respondents reported they have traveled



Source: Own

This next question shows a tendency within the LGBT community as a whole, that reassures what previous authors have stated about LGBT individuals traveling “more frequently and at various times of the year than straight travelers” according to Guaracino (2007), Gorkem (2012) and Lonely Planet (2014). Figure 18 confirms this statement, presenting evidence that suggests an even distribution of travels throughout the whole year with an, expectedly, slight peak in the month of August with 17%. The behavior that this dataset presents are similar across all generations and there is lack of differences of any kind.

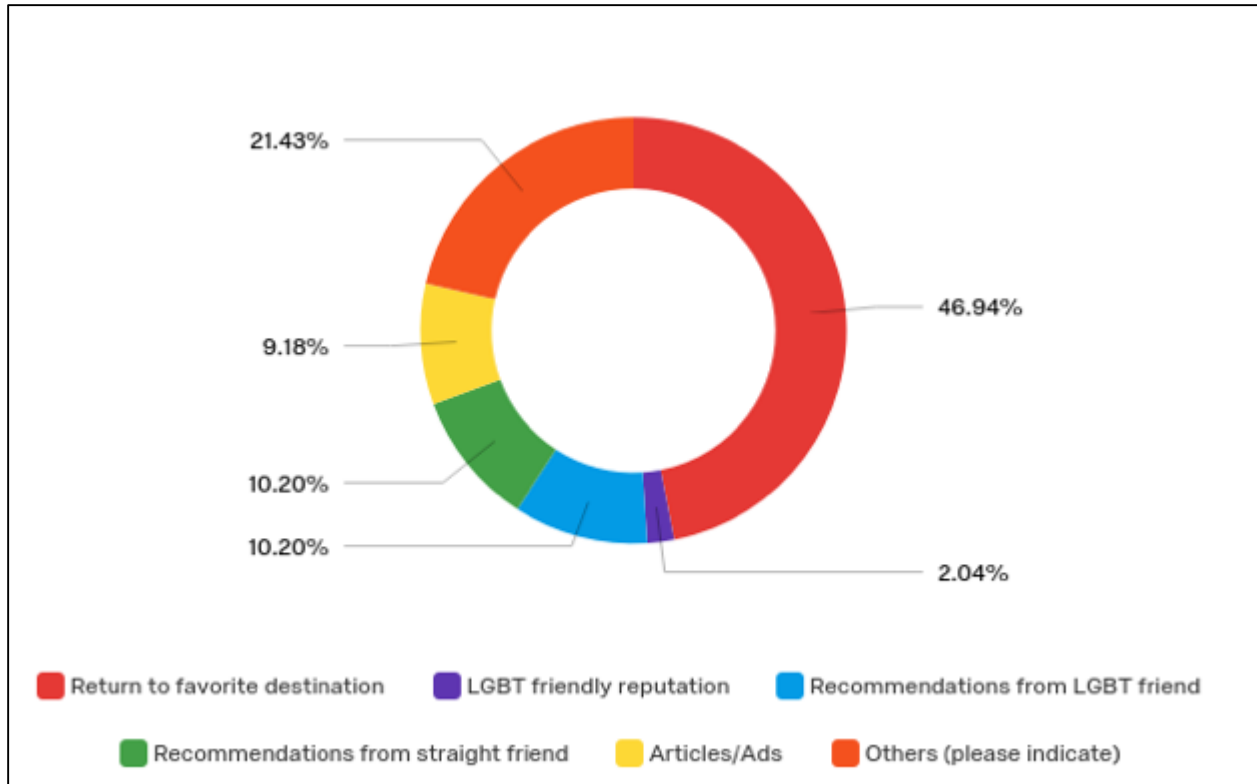
Figure 23: Q13 – Travel companion



Source: Own

The next data set from the survey is another general behavior reported from the respondents. Without any major differences between the two generation groups, the biggest representation consists of respondents reporting that they traveled with a friend or a group of friends last time, representing 38,78% of the total group. The next main categories are Alone and with Partner, respectively 24,49% and 29,59%. These three results, as well as the lack of guided group representation, shows evidence that confirm what might differentiate LGBT community the most from, for instance, straight travelers. According to Guaracino (2007), Gorkem (2012) and Lonely Planet (2014), the LGBT community is “more likely to travel in same sex couple, in groups of friends or alone and *not* as part of an escorted group”; a statement that is fully supported by this report.

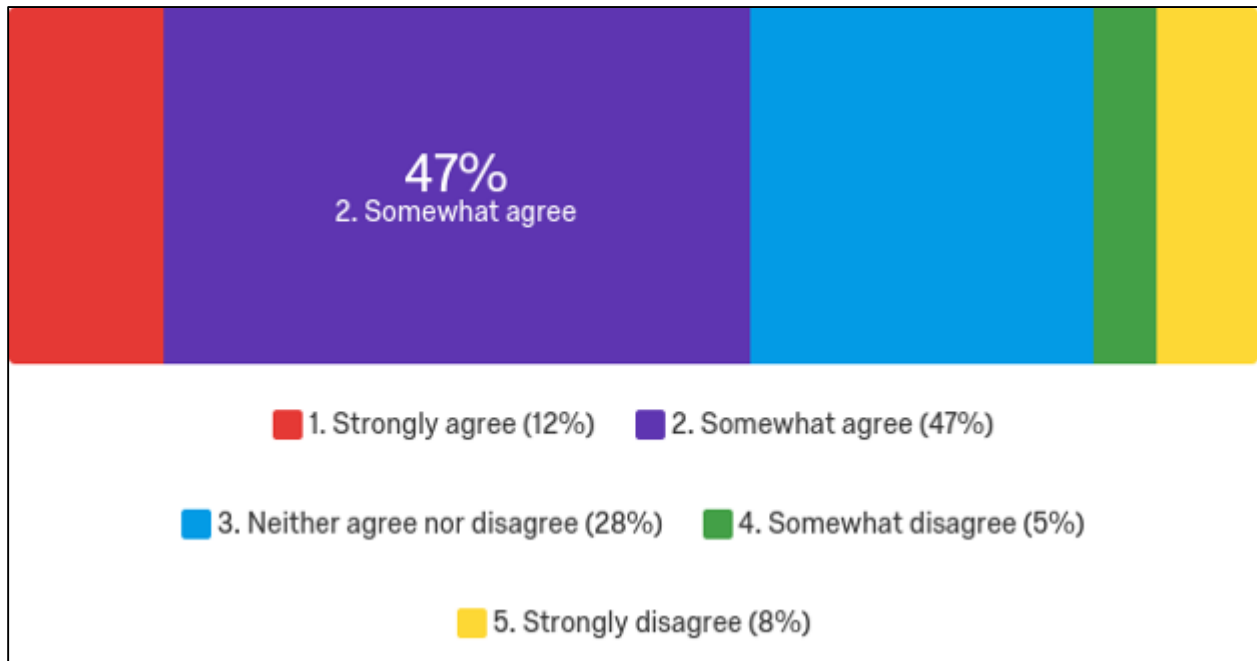
Figure 24: Q14 – Main motivation for last trip



Source: Own

This question analyzing the respondents' main motivation for the last trip they made, shows a clear indication that LGBT factors such as friendliness stand much weaker when compared to other factors. This is a tendency seen in both generation groups, showing no remarkable difference between the two in any of the variables. There is a strong indication, that suggests reasons such as returning to favorite destination, representing 46,94% of the group, to be the strongest driver.

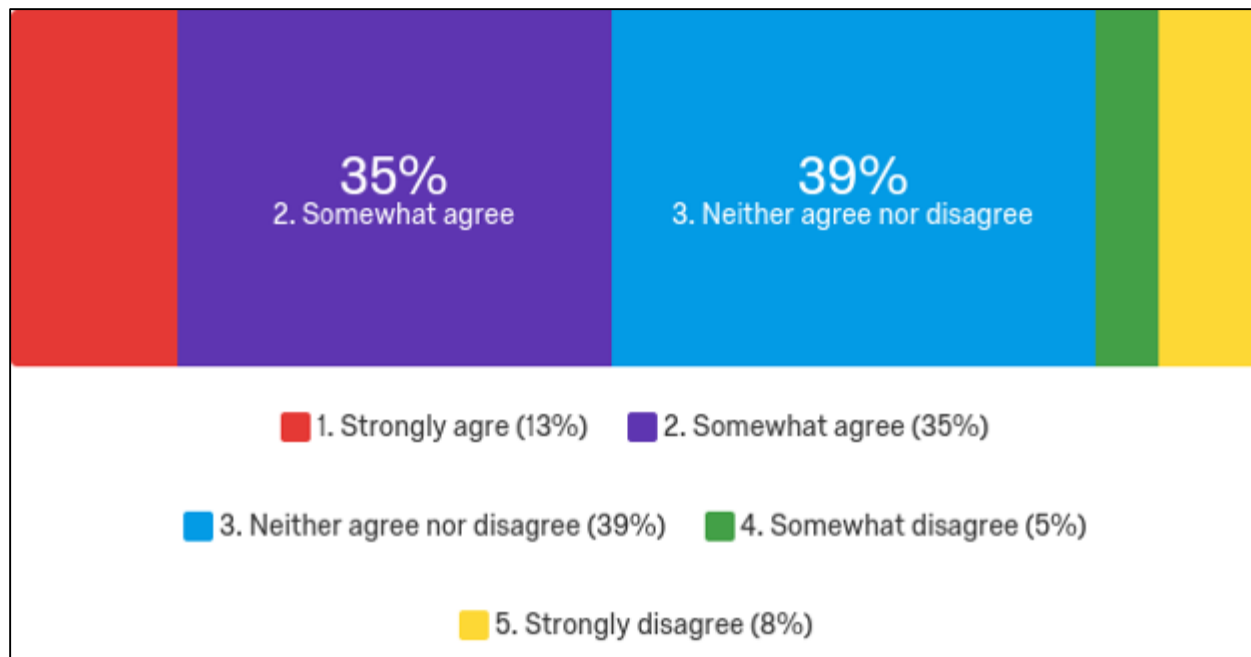
Figure 25: Q15 – Whether LGBT reputation of a destination is important



Source: Own

This dataset present evidence, that suggests that LGBT reputation is significantly important to the respondents across all generations, a total of 59% stating they Somewhat agree or Strongly agree to this question. The results are, surprisingly, different from what was previously reported in questions related to importance of various motivations when deciding a destination. This deviation shows that LGBT reputation maintains its general importance to respondents across generations, but when weighed up to more general factors such as price and quality, it plays a less important role.

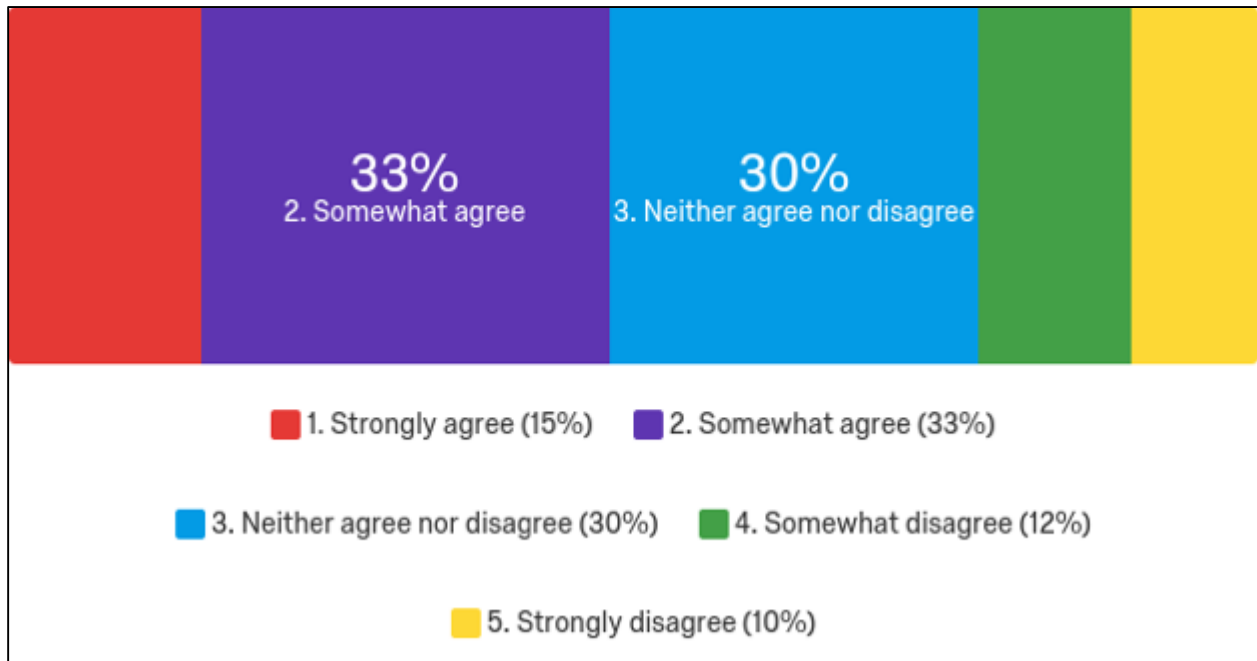
Figure 26: Q16 – Whether the LGBT reputation of an accommodation is important



Source: Own

Just as the previous question, this data set, analyzing how strong an accommodation’s LGBT reputation stands, shows pretty much the same results. There is a slightly lower support in terms of high importance, with a total of 48% reporting that they either Somewhat or Strongly agree to the question. That said, the 39% who stated they were neutral to the issue are subject for assumptions, that some of them belong to the upper level of this score between Somewhat Agree and Neither agree or disagree. Here again, there were no mentionable differences between the two generations.

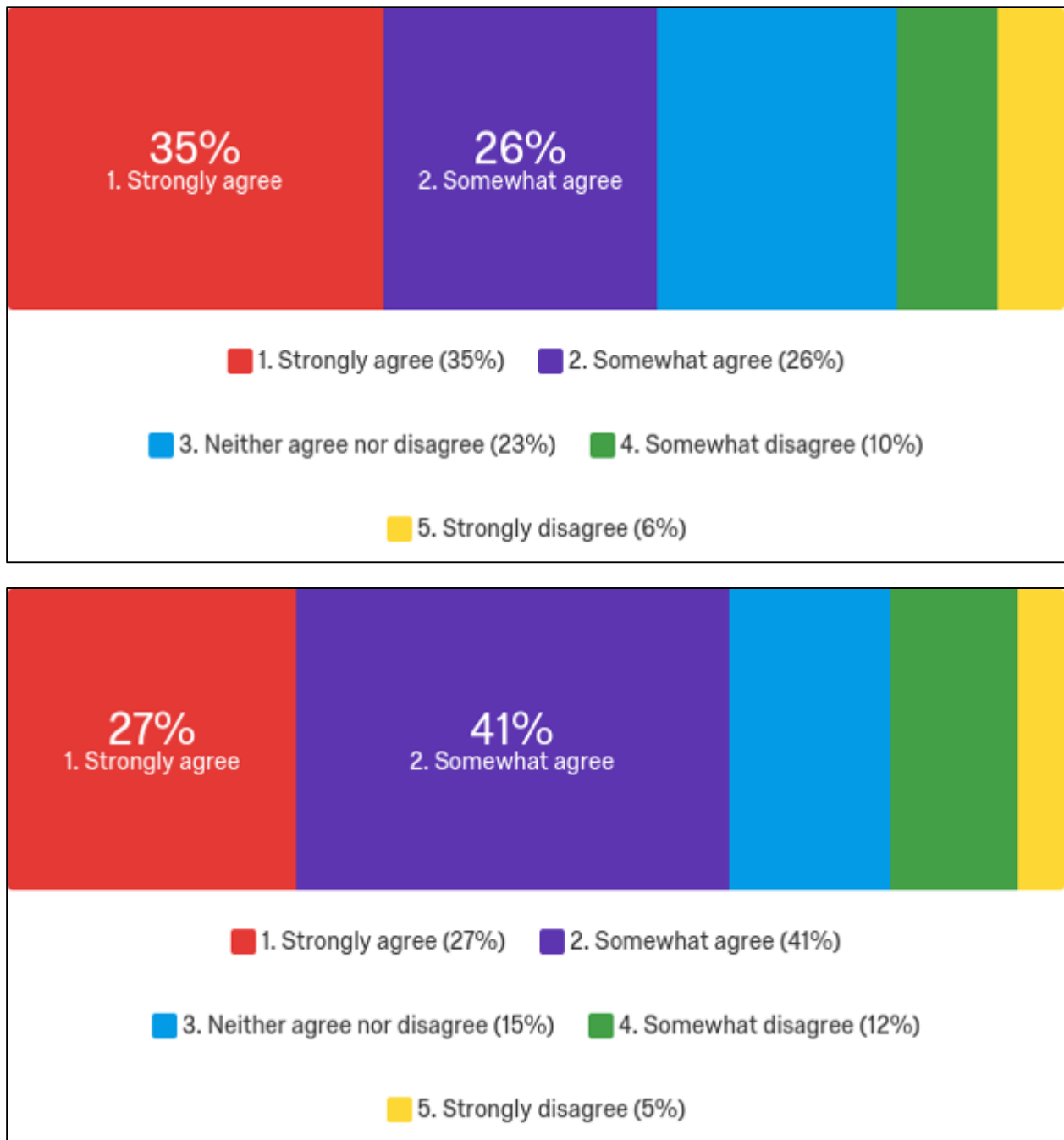
Figure 27: Q17 – Whether LGBT safety is considered an issue when traveling



Source: Own

The next series of data, used for a question analyzing the perception of LGBT safety as an issue when travelling, suggests a slightly below average representation of 48% reporting that LGBT safety is an issue for them when traveling. However, as seen in Figure 25, the Neutral group represents a significant 30% of the total group and there are reasons, due to the nature of the questionnaire, that some of those are more agreeing than disagreeing. There was a lack of differences between the two generations, a fact that, surprisingly, contradicts statements from previous conferences on this very topic (Goffman, 2016).

Figure 28: Q18 – Millennials (above) vs. Earlier Generations (Gen X)
 “Always visit a LGBT business (bar, restaurant, shops, clubs...) when traveling”



Source: Own

These two following data sets show us a measurement of how likely the respondents were to visit any kind of LGBT businesses when traveling. As proposed by earlier conference speakers and

experts on the topic, the LGBT Millennials are less likely to travel and exclusively visit gay businesses of any kind (Gen C Traveller, 2016). The results confirm this by suggesting a higher percentage of LGBT individuals from earlier generations, 35%, who strongly agree to the statement, compared to a lower 27% of the Millennials saying the same. Despite the lack of clear indications of differences, there is likely to assume that this is a sign of a starting trend gradually shifting the LTBT community’s general behavior.

Table 1: Q19 –Whether the respondents have experienced various situation when traveling

| Field | Strongly agree | 2. Somewhat agree | 3. Neither agree nor disagree | 4. Somewhat disagree | 5. Strongly disagree |
|---|----------------|-------------------|-------------------------------|----------------------|----------------------|
| Felt unsafe/at risk | 3.16% | 6.32% | 24.21% | 18.95% | 47.37% |
| Felt discriminated | 0.00% | 4.35% | 11.96% | 19.57% | 64.13% |
| Been verbally or physically harassed | 1.09% | 1.09% | 6.52% | 13.04% | 78.26% |
| Changed travel plans | 0.00% | 2.20% | 8.79% | 13.19% | 75.82% |
| Avoided certain places/destinations/attractions | 4.49% | 15.73% | 13.48% | 15.73% | 50.56% |
| Felt the need to censor myself in public | 8.70% | 15.22% | 14.13% | 17.39% | 44.57% |
| Felt the need to be more cautious | 8.70% | 23.91% | 11.96% | 15.22% | 40.22% |

Source: Own

The last question of the survey scrutinizes the respondents own personal experience and feelings when out traveling. It asks for evidence related to certain feelings or actions rooted in sexual orientation when traveling. As a whole group, the respondents state clearly that the majority Strongly disagrees with most of the statements except “the need to censor myself in public”, “the need to be more cautious” or “avoided certain places” which are the statements they agree with the most, respectively 32,6%, 23,92% and 20,22% either Somewhat or Strongly agreeing.

Table 2: Q19 – Millennials (above) vs. Earlier Generations (Gen X)

| Field | Strongly agree | 2. Somewhat agree | 3. Neither agree nor disagree | 4. Somewhat disagree | 5. Strongly disagree |
|---|----------------|-------------------|-------------------------------|----------------------|----------------------|
| Felt unsafe/at risk | 4.69% | 4.69% | 28.13% | 18.75% | 43.75% |
| Felt discriminated | 0.00% | 6.45% | 9.68% | 22.58% | 61.29% |
| Been verbally or physically harassed | 1.56% | 1.56% | 4.69% | 17.19% | 75.00% |
| Changed travel plans | 0.00% | 3.17% | 7.94% | 15.87% | 73.02% |
| Avoided certain places/destinations/attractions | 3.23% | 16.13% | 14.52% | 17.74% | 48.39% |
| Felt the need to censor myself in public | 10.94% | 20.31% | 10.94% | 17.19% | 40.63% |
| Felt the need to be more cautious | 9.38% | 25.00% | 12.50% | 15.63% | 37.50% |

| Field | Strongly agree | 2. Somewhat agree | 3. Neither agree nor disagree | 4. Somewhat disagree | 5. Strongly disagree |
|---|----------------|-------------------|-------------------------------|----------------------|----------------------|
| Felt unsafe/at risk | 0.00% | 10.00% | 16.67% | 16.67% | 56.67% |
| Felt discriminated | 0.00% | 0.00% | 17.24% | 13.79% | 68.97% |
| Been verbally or physically harassed | 0.00% | 0.00% | 11.11% | 3.70% | 85.19% |
| Changed travel plans | 0.00% | 0.00% | 11.11% | 7.41% | 81.48% |
| Avoided certain places/destinations/attractions | 7.69% | 15.38% | 11.54% | 11.54% | 53.85% |
| Felt the need to censor myself in public | 3.70% | 3.70% | 22.22% | 14.81% | 55.56% |
| Felt the need to be more cautious | 7.41% | 22.22% | 7.41% | 14.81% | 48.15% |

Source: Own

When it comes to comparing the two generations regarding the previous question, it shows, unexpectedly, that Millennials are more likely to feel the need to censor themselves in public when traveling in a destination with a representation of 31,25% either Somewhat or Strongly agreeing to the statement. On the other hand, the earlier generations report a total of 7,4% stating the same. Due to the nature of the survey's sample size, there is quite plausible to assume that these are individual differences showing trough, and not a general tendency as a whole generation. This makes the data presented less credible as of determining differences between the two groups on this very aspect.

5. Conclusions

5.1. Conclusions

The analysis seen in this study have, because of its nature, presented results that are preliminary, but they are subject for assumptions, initial conclusions and some recommendations and guidelines for further research on the topic. As a part of these conclusions, the idea of conducting further research on LGBT Millennials and their disruption of travel space suggests to be well worth. In that case, more precise data from a bigger sample size will be needed in order to develop a more accurate and broader spectrum of the LGBT community. That said, this paper does suggest some interesting results regarding LGBT Millennials and their behavior, comparing such with earlier generations. The aggregation of the age data helped offering evidence of the Millennials by dividing the survey respondents into two groups “LGBT Millennials” and “LGBT individuals from earlier generations” (Baby Boomers & Gen X).

- 1) The primary and clearest finding of this analysis, suggests **evidence of generational differences regarding personal motivation factors and drivers** upon selecting a destination or accommodation. The concept of most heavily weighted factors while booking a trip appears to differ especially in regards to LGBT friendliness, which is the main factor that separates the two groups. The analysis reports that LGBT Millennials assign lower importance to LGBT friendliness prior to booking than their precedential generations. The deviation between them is not outstanding, however, considering the transition process in time between two generations, it is definitely an interesting indication of what could be identified as a growing tendency that has just begun. These findings are in accordance with what the sole groundbreaking literature on this topic has suggested; LGBT Millennials are just as other Millennials, they are seeking unique, exotic and new experiences. Yes, they do choose to travel to LGBT friendly places, but not exclusively as before, Groffman (2016).

- 2) Secondly, the study reported in this analysis that there are also detectable **differentiations** between the two generations in relation to the **frequency of trips made** due to an **LGBT event**. The results suggest that the LGBT Millennials are more likely, and with a higher frequency, to travel in purpose of an event targeting the LGBT population. Although tendencies on other topics pertaining to LGBT Millennials show results in the opposite direction, that is less importance to the LGBT travel concept in general, this analysis suggests that this specific concept is a growing trend. However, the results actually confirm theories previously presented by other authors, stating that LGBT Millennials do travel more often than their precedents for LGBT events.

- 3) Additionally, the study suggests that in terms of **viewing LGBT reputation of a destination** as an important **issue** when traveling, the respondents show **no remarkable differences between the two generations**. However, the results do report contradicting information to what has been previously stated by other others on the subject. Both Goffman (2016) and GenCTraveller (2016) suggested LGBT Millennials, belonging to this new generation, are no longer paying the same level of attention to LGBT friendliness or reputation when traveling. Oppositely, this report suggests that LGBT Millennials do still consider this issue as essential, just as much as other generations do. These findings are of keen interest when compared with earlier conclusions discussed above, regarding LGBT reputation's role among other motivational factors. The two findings provide evidence that the LGBT reputation maintains its overall importance to respondents across all generations, but when weighed up to more general factors such as price and quality, it plays a decreasingly important role, especially among LGBT Millennials.

- 4) Furthermore, results **do not suggest much difference** between generations in the **perception of sexuality as an issue when traveling**. The study reported here presents information that shows an indication of a maintained level across generations to what degree the respondents perceived sexuality as an issue when booking a trip or when in a destination. Previous authors, such as Jordan (2016), suggested that LGBT Millennials

view their sexuality much more of a non-issue than earlier generations due to a more accepting and open-minded generation in itself. A comparison of such statements and the data presented in this analysis, provides evidence of deviations. This analysis suggests a steady level of importance when it comes to considering sexuality as an issue, regardless of generation.

- 5) Ultimately, while certain findings discussed above suggest that **LGBT reputation and friendliness** is maintaining its influence among LGBT Millennials, this study does confirm theories presented by previous authors such as Gen C Traveller (2016), stating that the LGBT Millennials are **less likely** to travel and exclusively **visit gay businesses**. This analysis presents data showing a lower representation among LGBT Millennials strongly agreeing to whether or not they always visit gay businesses on a trip. Despite the results', somewhat, vague nature and lack of clear differences, do suggests what seems to be a **starting trend of a shifting behavior** among the LGBT population.

5.2. Recommendations

In terms of further research, the main and most critical issue from this study is that, when investigating a population of such nature as the LGBT community, it is absolutely necessary to gather a sample of bigger size. Without a sufficient sample size offering more diverse and realistic data, a precise representation of the LGBT community is impossible to imitate. As discussed previously in this report, the LGBT population is of a such a diverse nature consisting of a numerous of subgroups and identities and require a spectrum of survey respondents as broad as possible. As a consequence, the benefits of improvements in terms of designing this investigation have already emerged; sampling a population much greater in size and include equal parts representing each generation.

Secondly, it would be of great contribution to, include a good number of in-depth interviews of professional actors in the travel industry targeting the LGBT population. This would allow evidence on the topic from another perspective, presenting real data and statistics from various agents, such as travel agencies, LGBT friendly accommodations, meeting points and

so on. To explore such data, building a larger total of data sets than this report did and then to combine both point of views in order to determine differences not only in in thought behavior through surveys, but also in in a “real life” context through actual figures and statistics. Comparing data in such way could, with greater insight, identify clear and more accurate indications in differences and behavioral aspects, and whether or not a generational shift within LGBT traveling can be detected at this time. Future research should take this into consideration and invest in the time and resources necessary for a conduct of such interviews to be enabled.

5.3. Limitations & Further Research

The intentional focus of this investigation was to identify and describe differences between LGBT Millennials and earlier generations in travel behavior both pre, during and after ended trip. While the participants were selected as carefully as possible in order to generate a credible representation of the LGBT population as a whole, it is acknowledgeable that due to a rather small sample size, the final results might not be accurate and representative enough for the LGBT population, being as diverse and varied as it is.

Additionally, as previously discussed in 3.5 Ethical Considerations, the use of so-called Snowball sampling, requesting participants to refer people like themselves, may have created a certain level of bias among the respondents. As a result, there are reasons to believe that a significant amount of the participants share social background and belonging and therefore also somewhat similar beliefs, opinions and lifestyles. For future research on this topic might need to take this into consideration and develop a more suitable research technique and methodology which facilitates and provides a more accurate and realistic representation of the LGBT environment as a whole population.

The intent of this study was to, based on data collected from the surveys, facilitate the development of recommendations for the industry sector in the field of LGBT tourism and how it could best adapt itself to a changing segment as an emerging niche market. Due to the mentioned limitations above including a possible misleading representation of the whole

LGBT community, such recommendations are difficult to make. That said, this study does present an interesting, but limited, representation of LGBT Millennials' behavior and preferences upon vacation choice and while at a destination but is subject to assume some variance in accuracy. Subsequent researchers should include larger data sets by using samples of greater size and provide sufficient resources and time for in-depth interviews. Such methodology and data collection techniques could facilitate a much more complex and in-depth investigation of how the travel behavior of LGBT Millennials has evolved from the generations before them. This would provide new and valuable information to build upon the existing, extremely limited, literature on this topic, which would offer an entirely new and superior understanding of the unique aspects of the LGBT Millennials.

6. References

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7. Appendix

Appendix A. Ethics Form



Ethics form

It is important that you are sufficiently prepared to collect data doing fieldwork with 'human participants.' Your supervisor will support you in completing the Ethics Form.

The Ethics Form **MUST BE COMPLETED BY YOURSELF AND SIGNED OFF BY YOUR SUPERVISOR BEFORE UNDERTAKING RESEARCH.**

THE SIGNED ETHICS FORM **MUST BE INCLUDED IN THE FINAL UNDERGRADUATE DISSERTATION.**

Risk checklist – Please answer ALL the questions in each of the sections below.

| Risk category 1 | Yes | No |
|---|-----|----|
| Use any information OTHER than that which is freely available in the public domain? | | X |
| Involve analysis of pre-existing data which contains sensitive or personal information? | | X |
| Involve direct and/or indirect contact with human participants? | X | |
| Require consent to conduct? | X | |
| Require consent to publish? | X | |
| Have a risk of compromising confidentiality? | | X |
| Have a risk of compromising anonymity? | | X |
| Involve risk to any party, including the researcher? | | X |
| Contain elements which you OR your supervisor are NOT trained to conduct? | | X |
| Risk Category 2 | | |

may not make any substantial amendments to the Undergraduate Dissertation without further approval.

Name: RUNE LUND SEGTMAN Signed [REDACTED] Date: 15/3

Agreement from the supervisor of the student:

Name: EMILI VALDERO Signed [REDACTED] Date: 15/3

Risk Category 1: If you answered NO to all the questions, your study is classified as Risk

Category 1. In this case:

- The supervisor can give immediate approval for undertaking the field work for the Undergraduate Dissertation.
- A copy of this signed Form MUST be included in the Undergraduate Dissertation.

Risk Category 2: If you answered YES only to questions in Risk Category 1 and/or 2,

your study is classified as Risk Category 2. In this case:

- You must meet with your supervisor and clarify how the issues encountered are going to be dealt with before taking off with the field work.
- Once clarified, the actions taken must be stated in the Form. Then the supervisor can guarantee approval for the field work for the Undergraduate Dissertation.
- A copy of this signed Form MUST be included in the Undergraduate Dissertation.

Risk Category 3: If you answered YES to questions included in Risk Category 3, your

study is classified as Risk Category 3. In this case:

- You must discuss with your supervisor how to re-direct the research and data collection thesis to avoid risks mentioned in Category 3.
- You must complete the Ethical Form again until Risk Category 1 or 2 is obtained.
- A copy of this signed Form MUST be included in the Undergraduate Dissertation.

A copy of this signed form MUST be included in the Undergraduate Dissertation.

Appendix B. Questionnaire

Q1 What is your age?

- 18 - 24
- 25 - 29
- 30-34
- 35-39
- 40-44
- 45-49
- 50-54
- 55-59
- 60-64
- 65+

Q2 On an average, how many leisure trips do you make a year?

- 0-1
- 1-2
- 3-4
- 4-5
- More than 5

Q3 On an average, approximately how much do you spend on a leisure trip (tickets/accommodation included)?

- 0-500 EUR/USD
- 500-1000 EUR/USD
- 1000-1500 EUR/USD
- 1500-2000 EUR/USD
- 2000+ EUR/USD

Q4 How do you prefer to book your trip?

- Computer
- Smartphone
- Phone (call)
- Walk-in (in person at travel agent/hotel/airline)
- Others (please indicate) _____

Q5 When booking your plane/cruise/train tickets, from whom do you prefer to buy from?

- Directly from airline/cruise line/rail provider
- Online Flight Search Engine (Skyscanner, Kayak, Google Flights...)
- Travel Agent/Tour Operator
- Group Buy (Groupon, LivingSocial...)
- Others (please indicate) _____

Q6 When booking your accommodation, from whom do you prefer to buy from?

- Directly from hotel/hostel/apartment provider
- Online booking engines (Booking.com, Expedia, Orbitz...)
- Travel Agent/Tour Operator
- Group Buy (Groupon, LivingSocial...)
- Others (please indicate) _____

Q7 What factors do you find the most important when choosing your destination? By dragging and dropping the answers, please rate from 1-5 (1 being the most important factor)

- _____ Price/Value (1)
- _____ Climate (2)
- _____ Accessibility (3)
- _____ LGBT reputation/friendliness (4)
- _____ Attractions (5)

Q8 What factors do you find the most important when choosing your accommodation? By dragging and dropping the answers, please rate from 1-5 (1 being the most important factor)

- _____ Price/Value (1)
- _____ Location (2)
- _____ Amenities (3)
- _____ LGBT reputation/friendliness (4)
- _____ Online Reviews/Ratings (TripAdvisor, Yelp...) (5)

Q9 Score the following statement on a scale from 1 to 5 I am likely to travel (or consider to travel) after seeing or hearing about a destination/accommodation from friends through social media

- 1. Strongly agree (1)
- 2. Somewhat agree (2)
- 3. Neutral (3)
- 4. Somewhat disagree (4)
- 5. Strongly disagree (5)

Q10 When choosing accommodation (hotel, hostel, apartment...), where do you prefer to book your stay?

- LGBT friendly establishment, advertised as a LGBT product
- LGBT friendly establishment, but not advertised as a LGBT product
- It doesn't matter as long as price/quality is good

Q11 For your recent trips, how frequently have you travelled for the purpose of an LGTB event (festivals, fairs, pride...)?

- None
- 1 time

- 2-3 times
- 3-4 times
- More than 5 times

Q12 In which months did you travel for your recent trips?

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

Q13 With who did you travel the last time?

- Alone
- Friend/Group of friends
- Partner
- Guided group
- Family

Q14 What motivated you to travel the last time?

- Return to favorite destination
- LGBT friendly reputation
- Recommendations from LGBT friend
- Recommendations from straight friend
- Articles/Ads
- Others (please indicate) _____

Q15 Score the following statements on a scale from 1 to 5 When choosing where to travel, the LGBT reputation/friendliness at the destination is important to me

- 1. Strongly agree (1)
- 2. Somewhat agree (2)
- 3. Neither agree nor disagree (3)
- 4. Somewhat disagree (4)
- 5. Strongly disagree (5)

Q16 When choosing where to stay, the LGBT reputation/friendliness at the accommodation (hotel, hostel, apartment...) is important to me

- 1. Strongly agree (1)

- 2. Somewhat agree (2)
- 3. Neither agree nor disagree (3)
- 4. Somewhat disagree (4)
- 5. Strongly disagree (5)

Q17 When I travel to a destination, I find LGBT safety an issue

- 1. Strongly agree (1)
- 2. Somewhat agree (2)
- 3. Neither agree nor disagree (3)
- 4. Somewhat disagree (4)
- 5. Strongly disagree (5)

| | Strongly agree (1) | 2. Somewhat agree (2) | 3. Neither agree nor disagree (3) | 4. Somewhat disagree (4) | 5. Strongly disagree (5) |
|---|-----------------------|-----------------------------|--|-----------------------------|-----------------------------|
| Felt unsafe/at risk | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Felt discriminated | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Been verbally or physically harassed | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Changed travel plans | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Avoided certain places | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Felt the need to censor myself in public | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Felt the need to be more cautious | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Q18 When at my destination, I always visit gay businesses/bars/restaurants/clubs

- 1. Strongly agree (1)
- 2. Somewhat agree (2)
- 3. Neither agree nor disagree (3)
- 4. Somewhat disagree (4)
- 5. Strongly disagree (5)

Q19 During my recent travels I have due to sexual orientation...

