



2024 **Portrait *of*
American LGBTQ+
International
Travelers™**

WEBINAR
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AGENDA

1. Welcome & Introductions
2. Spain Prospects vs. non-Prospects
3. Spain Custom Questions
4. Select Key Findings
5. How to read Data Files
6. Q&A



Methodology

MMGY Global conducted the fifth annual national survey of American international travelers and second annual national survey of Canadian international travelers. These surveys encompassed their travel behaviors, including travel spend, destination preferences, post-pandemic travel behavior, sources used during travel planning, motivators for traveling internationally, flight preferences and attitudes toward safety, among other topics.

In order to qualify for the survey, respondents had to:

- Reside in the U.S. or Canada
- Have taken at least one vacation outside of North America or the Caribbean during the past three years
- Expect to take at least one vacation outside of North America or the Caribbean during the next 12 months

An online survey was conducted for American travelers (July 24th through August 20th, 2024) and Canadian travelers (July 24th through August 13th, 2024) and received a total of 3,075 responses, 2,049 in the U.S. and 1,026 in Canada. Respondents were selected randomly and participated in a 20-minute online survey. The sample has been weighted based on age, gender, ethnicity, household income, geography and education to ensure the data is representative of American and Canadian households. Due to the small percentage of travelers in the Silent generation, we did not include their individual results.

For the Spanish Tourist Office in Los Angeles, MMGY Global also conducted a customized version of the survey targeting U.S. travelers who identify as LGBTQ+. A total of 417 responses were collected from this group. The findings from the main survey are detailed in the *Portrait of American & Canadian International Travelers*, while the insights specific to LGBTQ+ travelers are presented in this report, *Portrait of U.S. LGBTQ+ International Travelers*.

Generation	Age	% of Respondents
Gen Zers	18–26	17%
Millennials	27–42	32%
Gen Xers	43–58	26%
Boomers	59–77	24%
Silent/GI	78+	2%

Methodology



This report presents both the responses from the main survey and a set of custom questions commissioned by the Spanish Tourist Office in Los Angeles. The analysis focuses on four key groups:

1.LGBTQ+ Travelers: U.S. international travelers who identify as LGBTQ+. This group is further divided into:

- **LGBTQ+ Prospects:** LGBTQ+ travelers who express strong interest in visiting Spain.
- **LGBTQ+ Non-Prospects:** LGBTQ+ travelers who are not interested in visiting Spain.

2.Other Travelers: U.S. international travelers who do not identify as LGBTQ+. This group is also divided into:

- **Other Prospects:** Non-LGBTQ+ travelers who are highly interested in visiting Spain.
- **Other Non-Prospects:** Non-LGBTQ+ travelers who are not interested in visiting Spain.

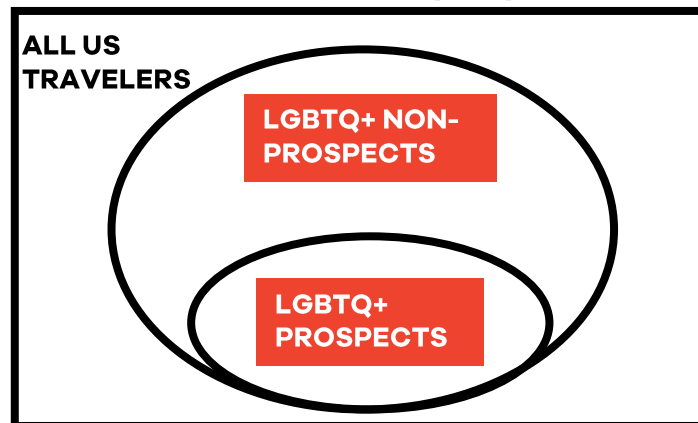
This report is divided into two sections:

•**Section 1:** A comparison of LGBTQ+ Prospects versus LGBTQ+ Non-Prospects.

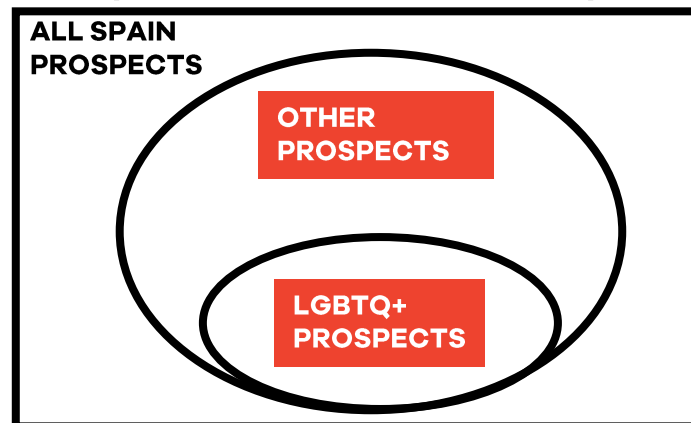
•**Section 2:** A comparison of LGBTQ+ Prospects with Other Prospects.

The diagrams below illustrate the grouping and analysis used in this report.

Section 1 – Comparing LGBTQ+ Prospects versus LGBTQ+ Non-prospects

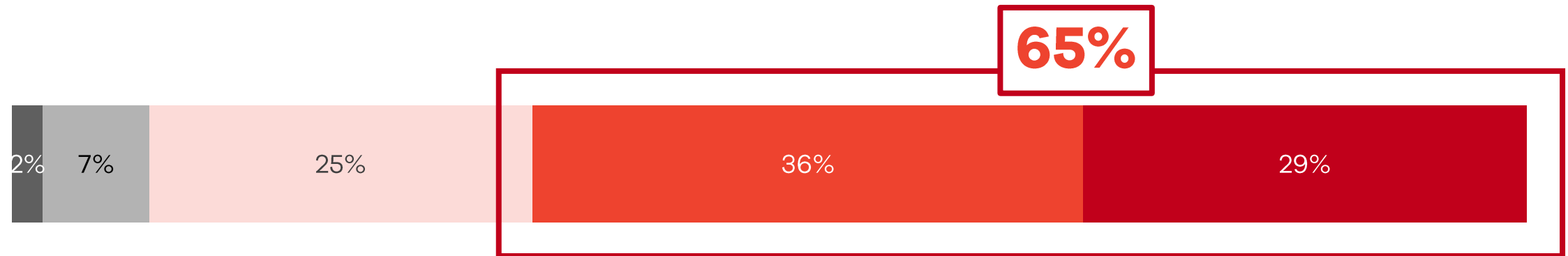


Section 2 – Comparing LGBTQ+ Prospects versus Other Other Prospects



90% of LGBTQ+ international travelers indicated an interest in visiting Spain in the next 3 years.

65% of US, LGBTQ+ respondents, who were either "very" or "extremely" interested in visiting Spain in the next 3 years, were defined as "prospects" for Spain.



■ Not at all interested ■ Not too interested ■ Somewhat interested ■ Very interested ■ Extremely interested

Note: All LGBTQ+ international travelers, regardless of their preferences for regions, were asked to rate their level of interest in visiting Spain in the next 3 years for a leisure trip (on a scale of 1-5 with 5 being extremely interested).

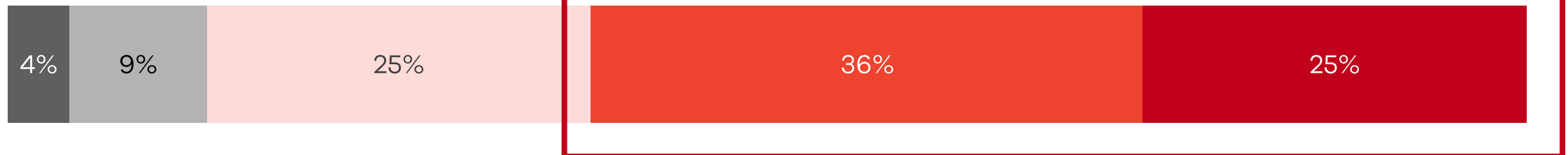
Base: American International LGBTQ+ Travelers: n=417

Source: MMGY Global's 2024 Portrait of American International Travelers™

87% of Other international travelers indicated an interest in visiting Spain in the next 3 years.

61% of US, Other respondents, who were either "very" or "extremely" interested in visiting Spain in the next 3 years, were defined as "prospects" for Spain.

61%



■ Not at all interested ■ Not too interested ■ Somewhat interested ■ Very interested ■ Extremely interested

Note: All LGBTQ+ international travelers, regardless of their preferences for regions, were asked to rate their level of interest in visiting Spain in the next 3 years for a leisure trip (on a scale of 1-5 with 5 being extremely interested) .

Base: American International Travelers: (Other travelers: n=2,020)

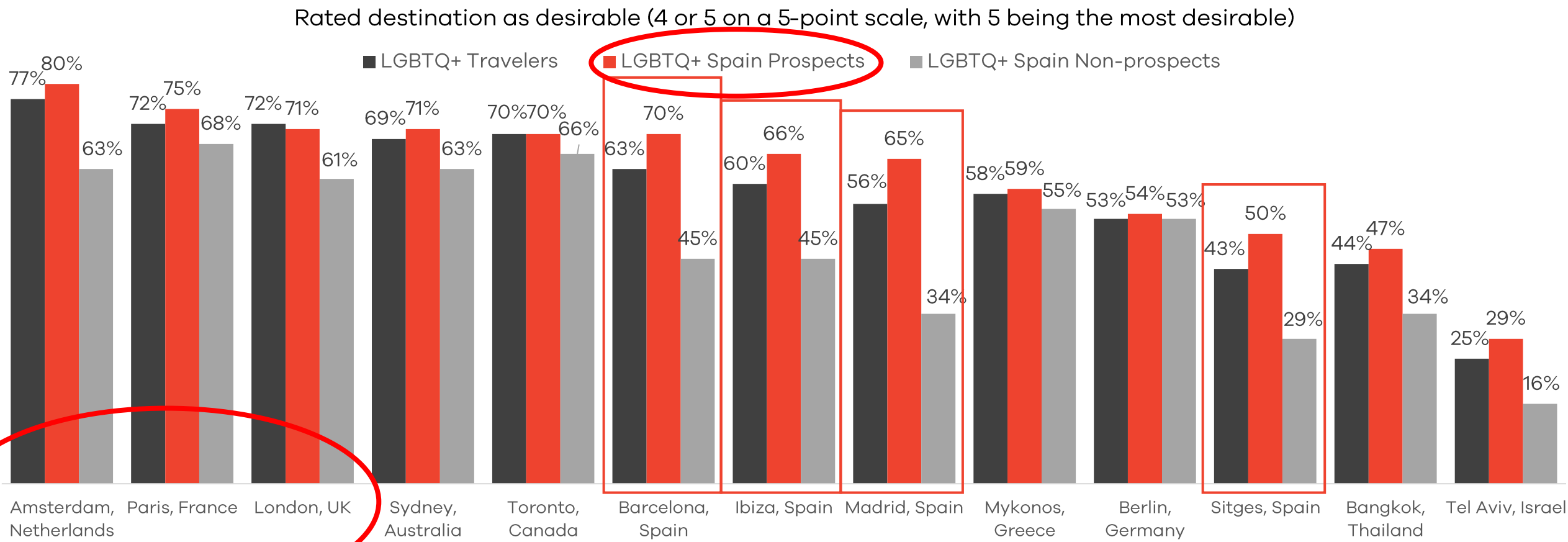
Source: MMGY Global's 2024 *Portrait of American International Travelers*™

Snapshot of LGBTQ+ Spain Prospects vs. LGBTQ+ Non-prospects vs. Other Prospects

	LGBTQ+ Prospect	LGBTQ+ Non-prospect	Other Prospect
Average age	40	47	44
Median income	\$104K	\$96K	\$132K
Avg. number of international vacations plan to take during the next 2 years	5.1	3.4	4.8
Avg. amount plan to spend on international vacations during the next 12 months	\$10,902	\$6,628	\$12,437

Spain Custom Questions

Amsterdam, Paris and London were perceived as the most desirable destinations for LGBTQ+ Spain Prospects, although Spanish cities featured the most out of any country.

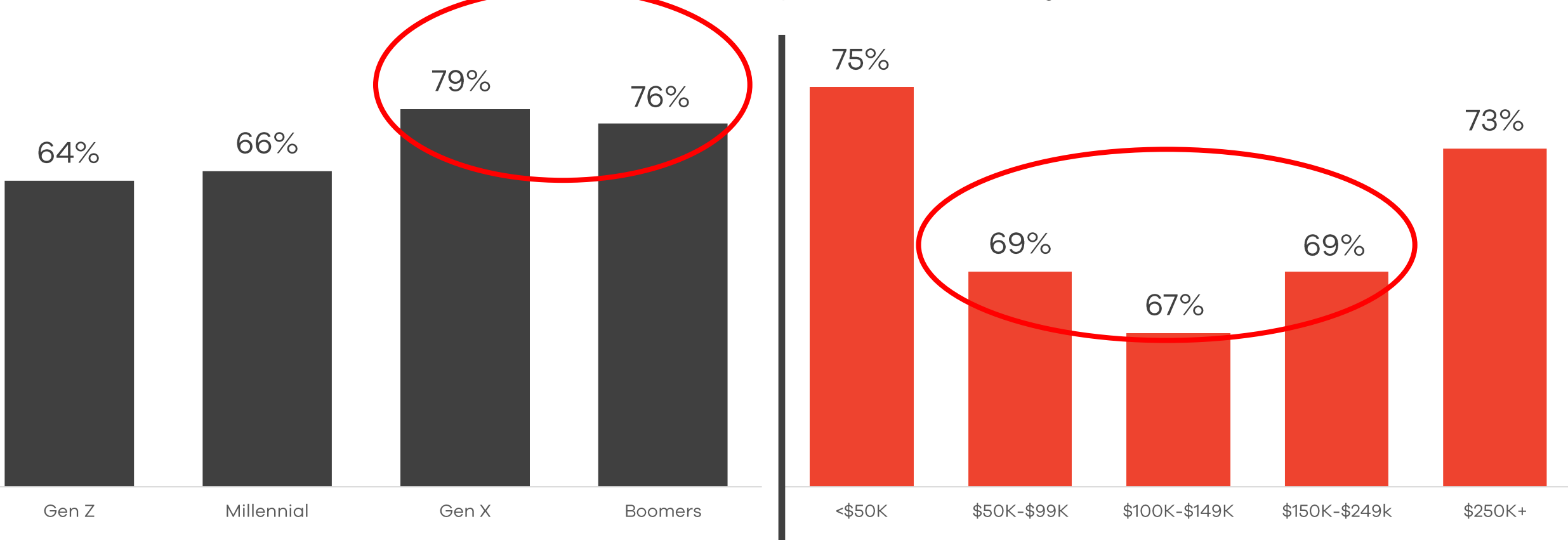


Base: LGBTQ+ Travelers (n=527), LGBTQ+ Prospects (n=352), LGBTQ+ Non-prospects (n=48)
Source: MMGY Global's 2024 Portrait of American International Travelers™

Barcelona's desirability to LGBTQ+ Prospects was highest amongst Gen X, followed by Boomers.



Rated Barcelona as desirable (4 or 5 on a 5-point scale, with 5 being the most desirable)



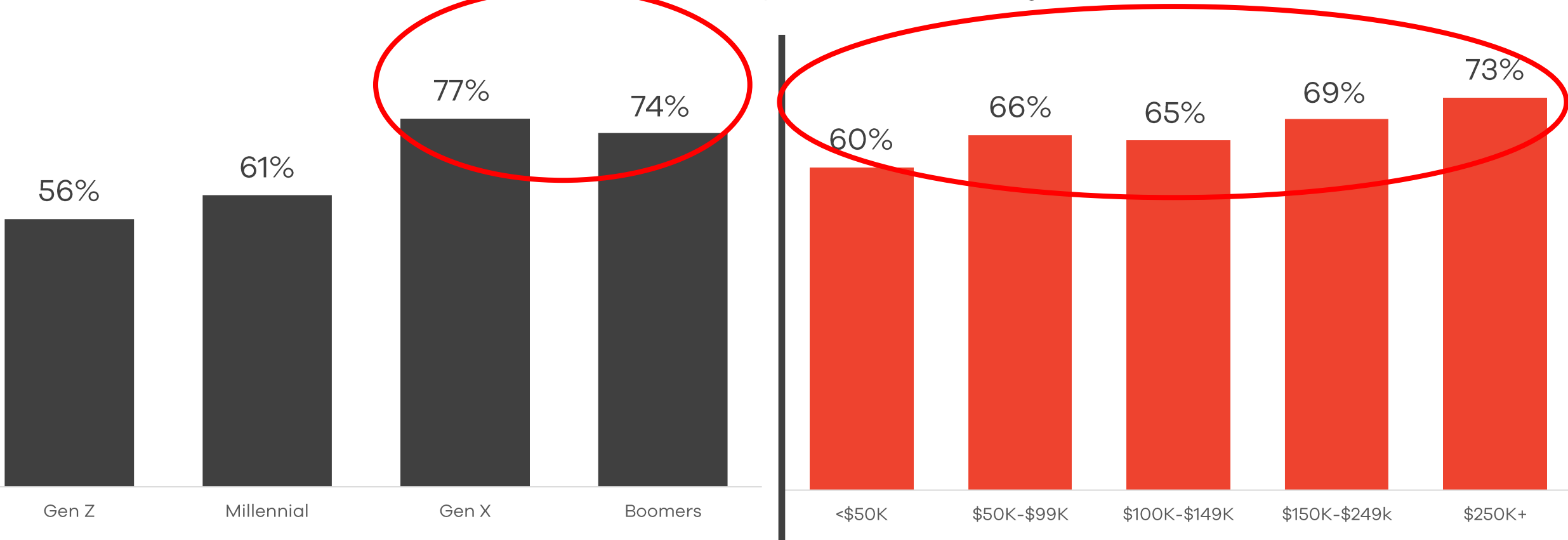
Base: LGBTQ+ Prospects (n=352)

Source: MMGY Global's 2024 Portrait of American International Travelers™

Madrid is most desirable to Gen X and Boomer generations of LGBTQ+ Prospects.



Rated Madrid as desirable (4 or 5 on a 5-point scale, with 5 being the most desirable)



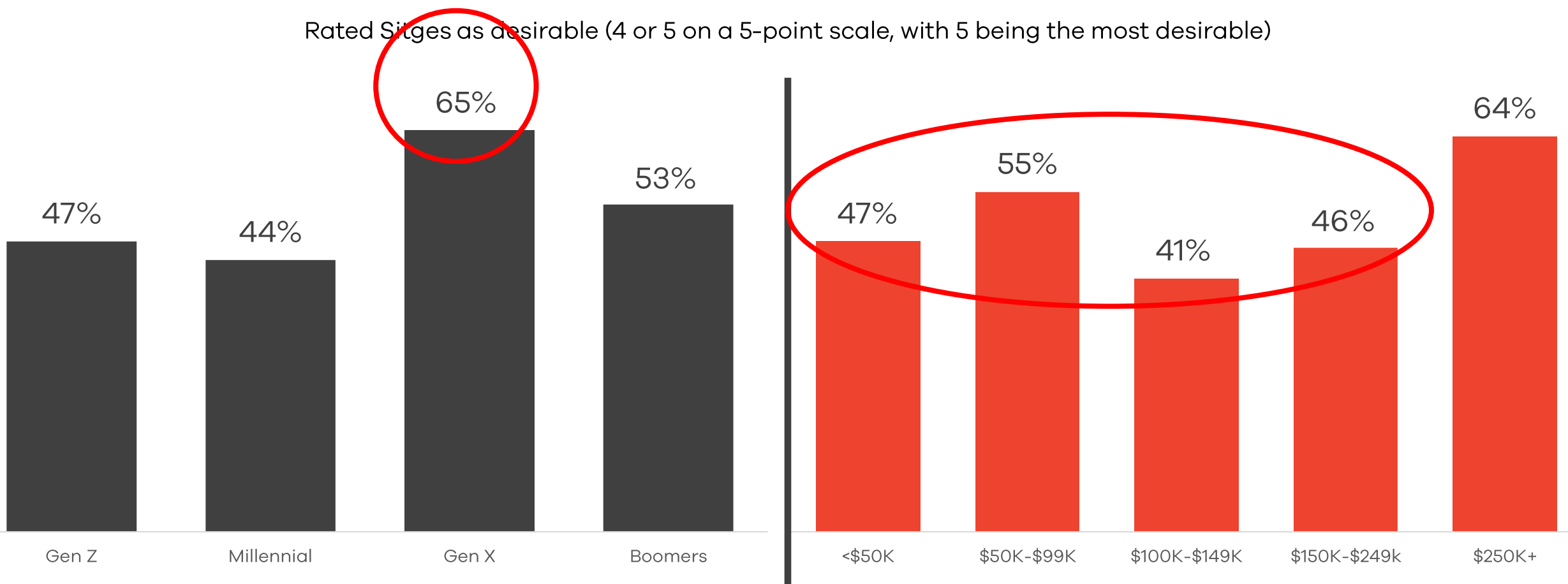
Base: LGBTQ+ Prospects (n=352)

Source: MMGY Global's 2024 Portrait of American International Travelers™

Sitges is the most desirable to Gen X Prospects, with Millennials finding it the least desirable.



Rated Sitges as desirable (4 or 5 on a 5-point scale, with 5 being the most desirable)



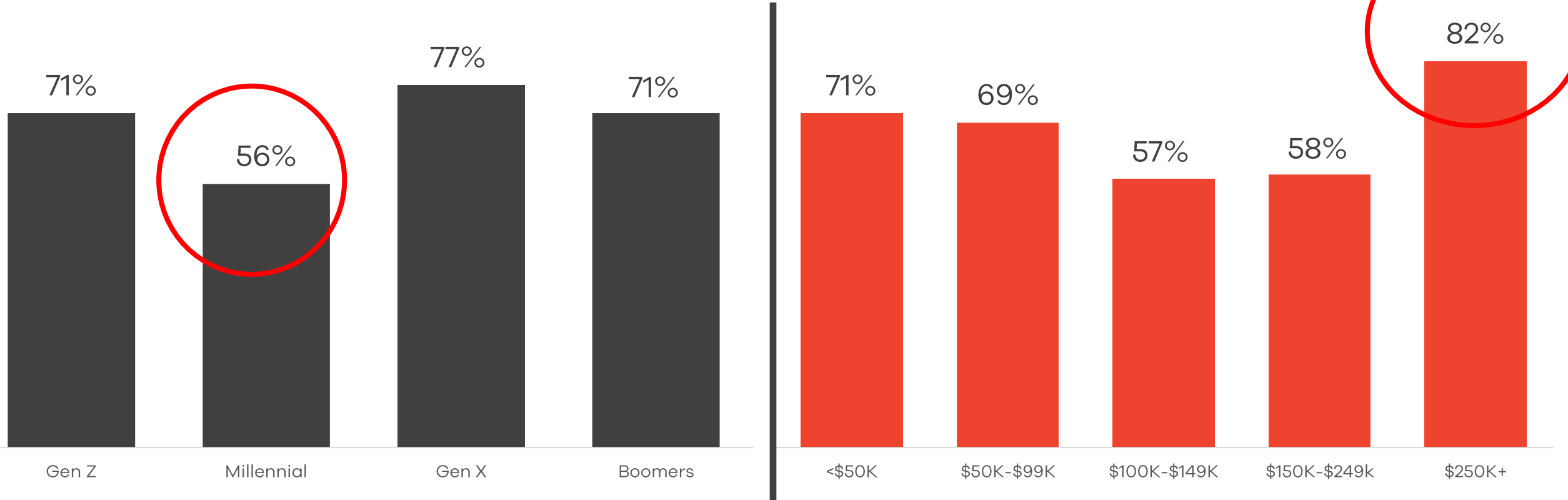
Base: LGBTQ+ Prospects (n=352)

Source: MMGY Global's 2024 Portrait of American International Travelers™

Ibiza is highly desirable to all Prospects, excluding Millennial travelers.



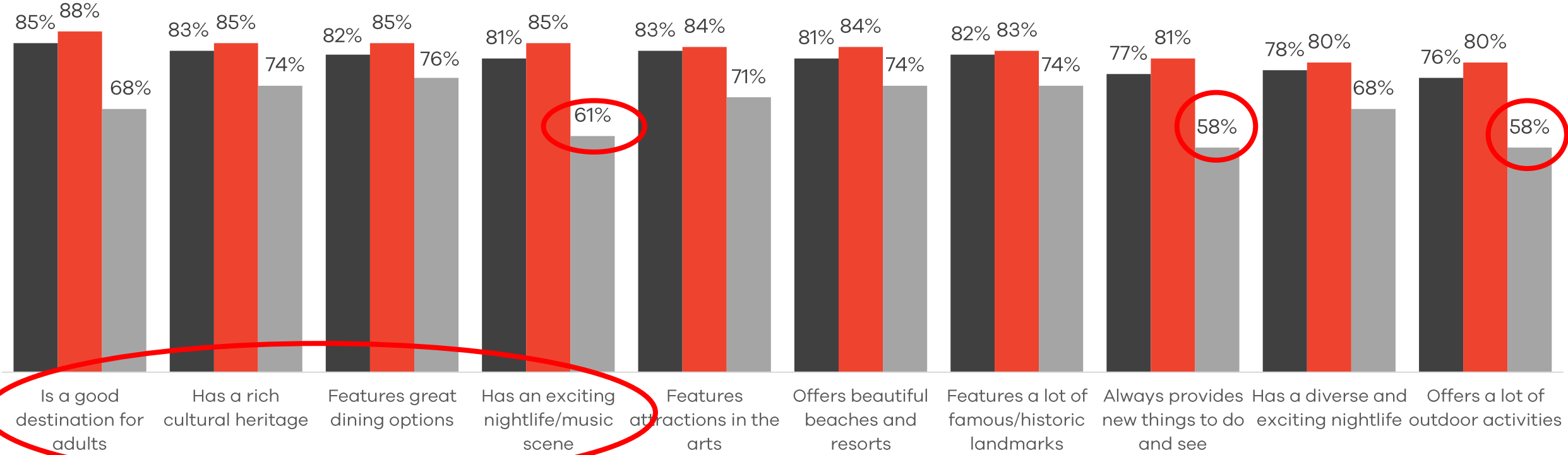
Rated Ibiza as desirable (4 or 5 on a 5-point scale, with 5 being the most desirable)



Spain is perceived by LGBTQ+ Prospects as a good adult destination, with a rich cultural heritage and great dining options...

How much do you agree with the following statements related to Spain as a LGBTQ+ destination?

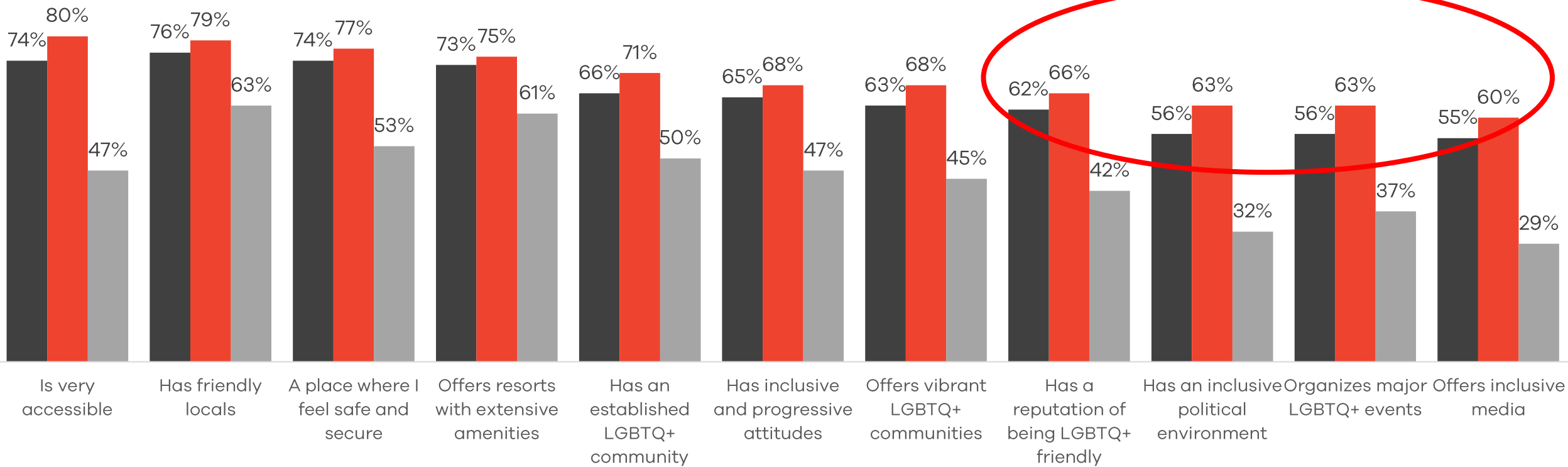
■ LGBTQ+ Travelers ■ LGBTQ+ Prospects ■ LGBTQ+ Non-prospects



...Spain is less-known for its inclusive media or major LGBTQ+ events, although it has a strong reputation with Prospects across many areas.

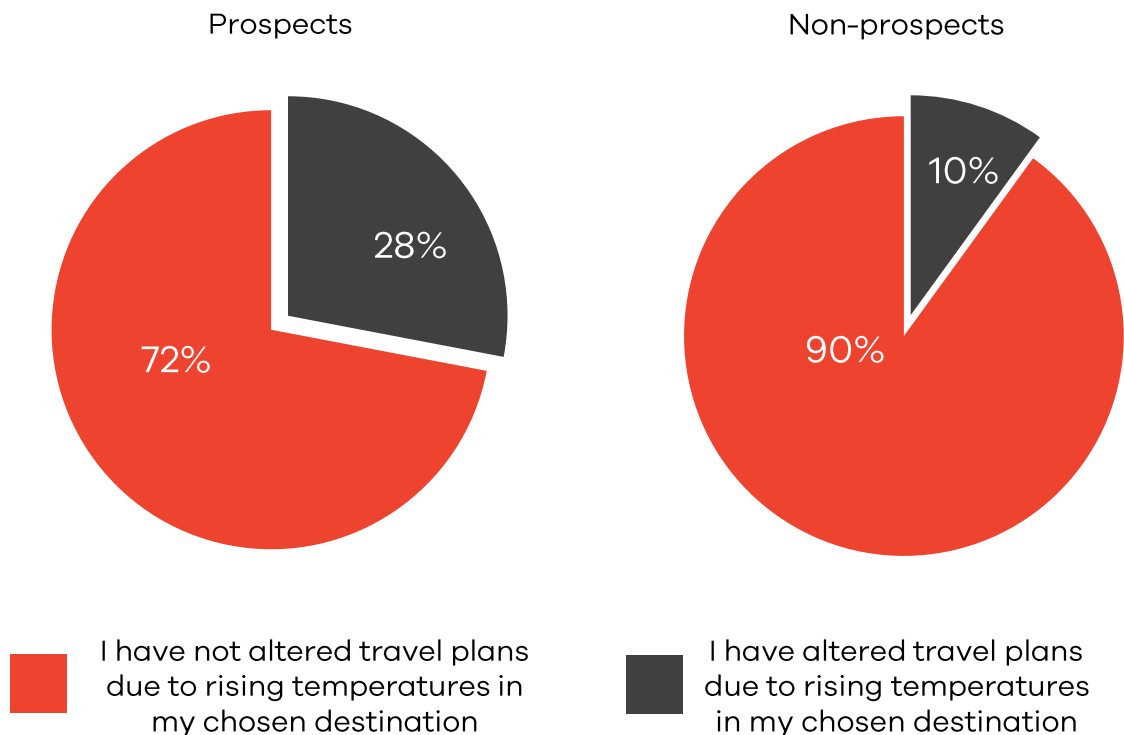
How much do you agree with the following statements related to Spain as a LGBTQ+ destination?

■ LGBTQ+ Travelers ■ LGBTQ+ Prospects ■ LGBTQ+ Non-prospects



Prospects were significantly more likely to have altered their travel plans due to rising temperatures. *

The Impact of Rising Temperatures on International Travelers' Plans



How Travel Plans Were Altered Among those who altered plans	Prospects
I have changed my travel dates to visit during a different time of year	41%
I have chosen to visit a different travel destination at this time	37%
I have changed my itinerary to include fewer outdoor activities	38%
I have had to book different accommodations that were equipped with air conditioning/central air	47%
I have canceled a trip entirely because of rising temperatures and do not plan to visit at a later date	28%

*Low numbers of respondents should be considered with caution.
Base: American, LGBTQ+ international travelers who have altered their travel plans due to rising temperatures: Prospects (n=78), Non-prospects (n=5)
Source: MMGY Global's 2024 *Portrait of American International Travelers*™

Friends and family are the top source for travel advice, although Prospects tend to consider a wider range of sources.

Sources Considered When Planning Travel	Prospects	Non-prospects
Friends and family	51%	55%
Travel review websites	43%	55%
The destination's website	42%	45%
Online travel agencies (Expedia, Orbitz, etc.)	40%	45%
Online visitor guides	34%	37%
Social media posts from destinations or travel service providers	34%	21%
Video sharing websites (YouTube, etc.)	33%	34%
Travel service provider websites (Hilton, Delta, etc.)	32%	34%
Streaming TV services (Netflix, Hulu, etc.)	26%	18%
Printed travel guidebooks	24%	16%
Social media influencers	23%	18%
Magazine/newspaper articles	23%	16%
Online/social media advertising	22%	21%
Content from publishers (Buzzfeed, New York Times, etc.)	22%	13%
Traditional travel advisor	20%	18%
Television shows	17%	11%
Digital newspaper/magazine	17%	11%
Email from the destination	16%	8%
Magazine/newspaper advertisements	14%	13%
Streaming audio (Pandora, Spotify, etc.)	14%	8%
Television advertising	13%	8%
Podcasts	13%	8%
Email from the travel service provider	10%	11%
Billboards	9%	3%
Direct mail	8%	0
Radio shows/advertising	7%	5%
None of the above	0	5%

Base: American International Spain Prospects (LGBTQ+ Prospects: n=274; LGBTQ+ Non-prospects: n=38)

Source: MMGY Global's 2024 *Portrait of American International Travelers*™

Booking.com and Hotels.com are significantly more popular amongst Prospects compared to Non-prospects.

Specific Websites Used To Obtain International Travel Information	Prospects	Non-prospects
Expedia	48%	32%
Booking.com	46%	24%
YouTube	44%	34%
Tripadvisor	43%	50%
Hotels.com	37%	13%
Specific airline brand website (such as Delta/British Airways)	35%	34%
Google Travel	35%	24%
Specific hotel brand website (such as Hilton/Marriott)	28%	29%
Travelocity	28%	18%
Trivago	28%	16%
Specific vacation destination website (such as Visit London)	27%	34%
Priceline	25%	13%
Travel blogs	23%	16%
Kayak	21%	8%
Orbitz	12%	3%
Other	3%	18%

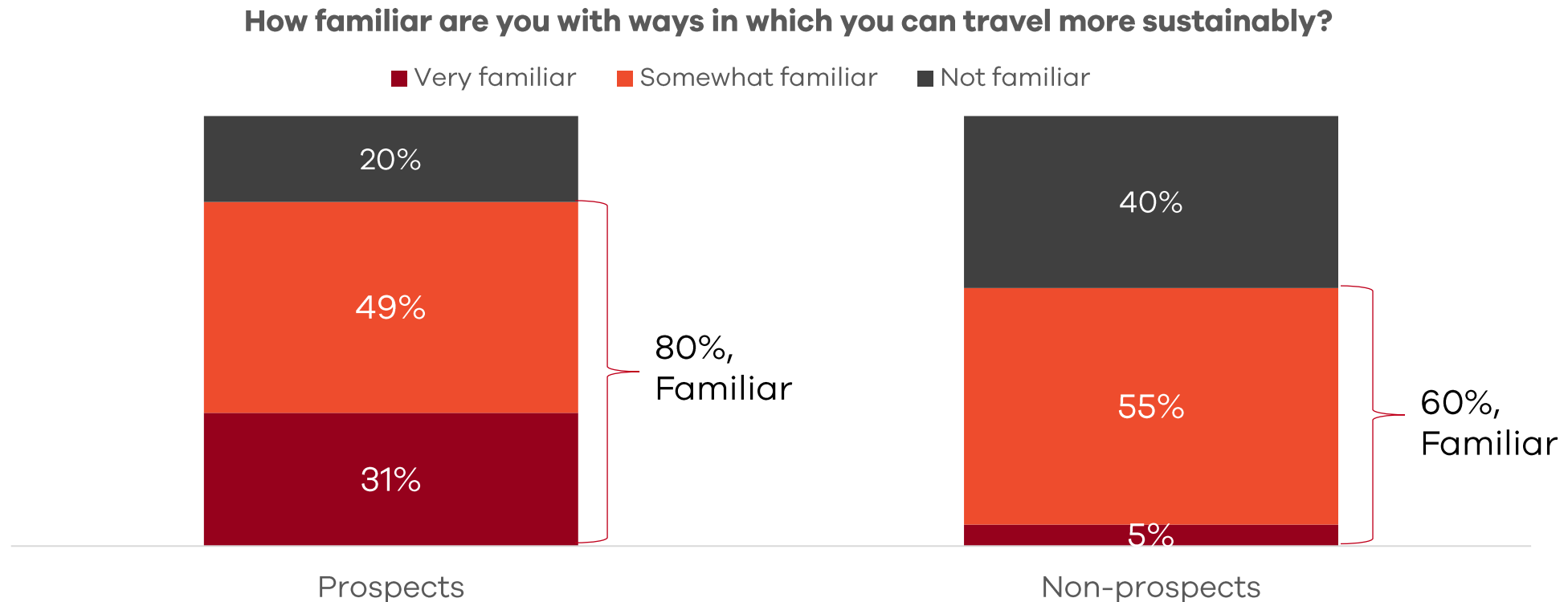
Base: American International Spain Prospects (LGBTQ+ Prospects: n=274; LGBTQ+ Non-prospects: n=38)

Source: MMGY Global's 2024 *Portrait of American International Travelers*™

Instagram is used by Prospects when planning travel far more than by Non-prospects. **Social media** is used when planning travel by **78%** of Prospects compared to **59%** of Non-prospects.

Social Media Platforms Used When Planning Travel	Prospects	Non-Prospects
YouTube	51%	38%
Instagram	40%	9%
TikTok	34%	26%
Facebook/META	24%	18%
None of the above	22%	41%
Pinterest	21%	12%
X-formerly Twitter	18%	3%
Snapchat	10%	0%
LinkedIn	6%	3%
Telegram	5%	0%
Other	1%	3%
None of the above	22%	41%

Prospects demonstrate a greater understanding of sustainable travel practices compared to Non-prospects...

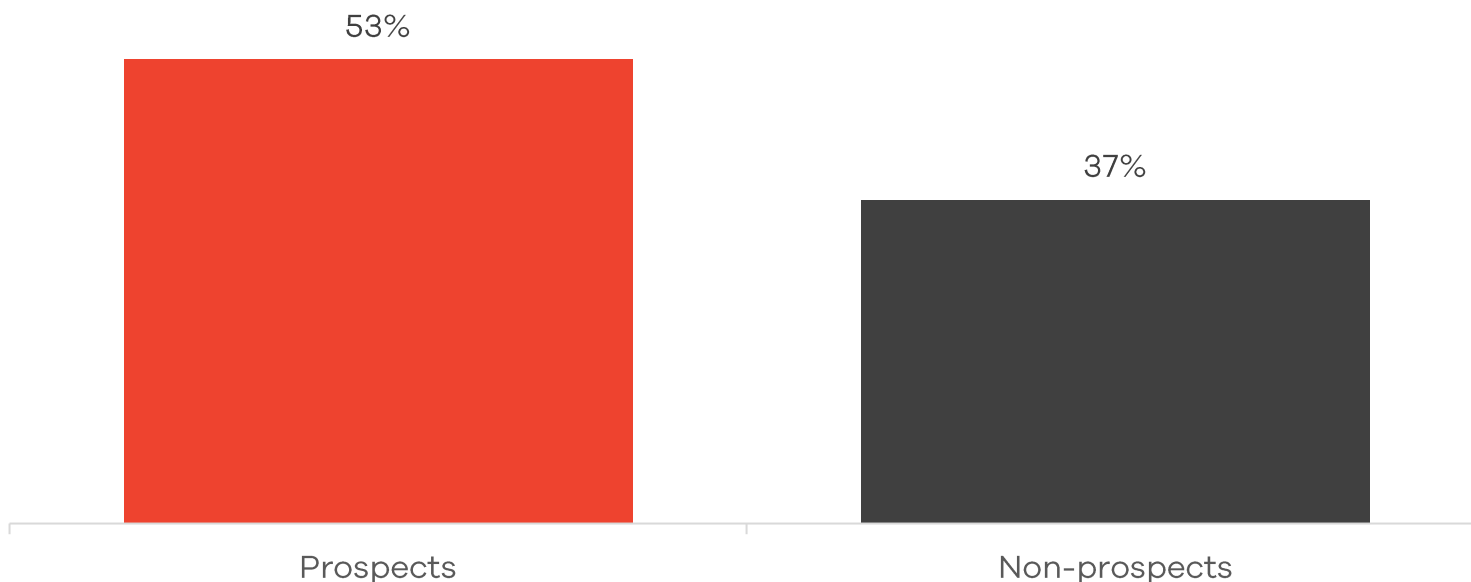


Base: American International Spain Prospects (LGBTQ+ Prospects: n=274; LGBTQ+ Non-prospects: n=38)

Source: MMGY Global's 2024 *Portrait of American International Travelers*™

Half (50%) of Prospects are planning to use a travel advisor in the next two years, compared to one in three (33%) of Non-prospects.

% of Prospects Who Plan to Use a Travel Advisor for International Holidays During the Next 2 Years



Generational differences:

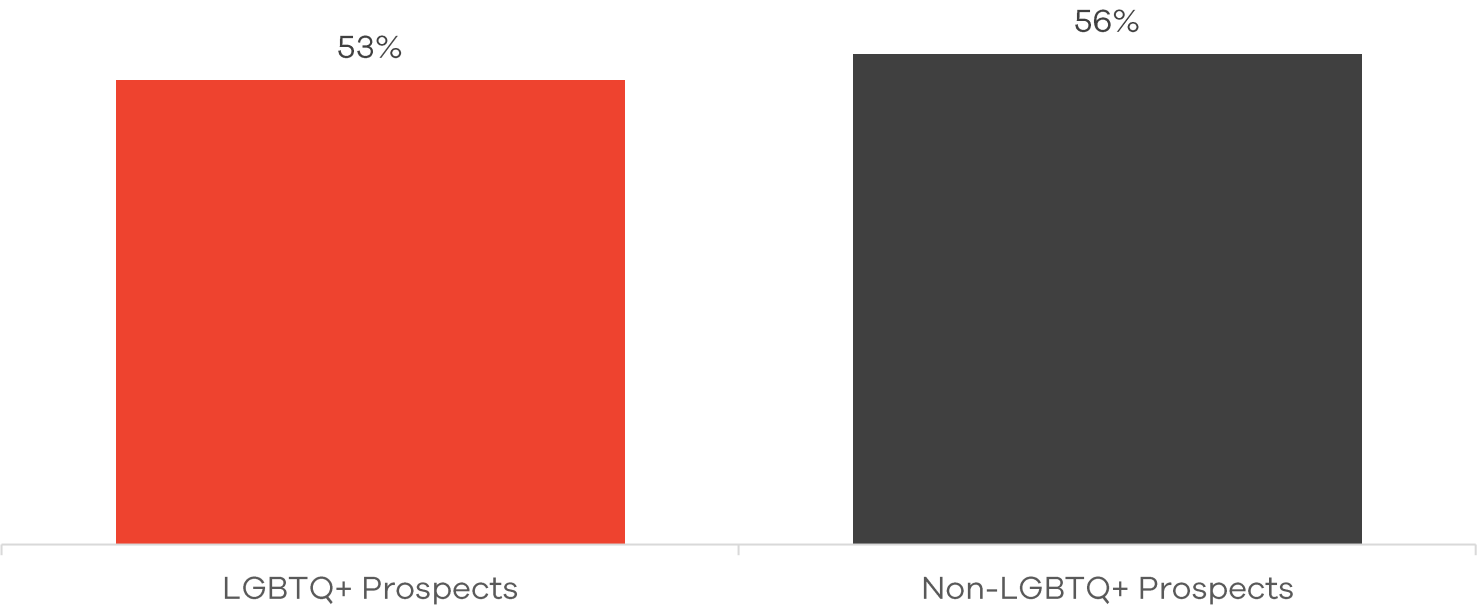
- Gen Z (67%) and Millennials (62%) are the most likely to use a traditional travel advisor in the next 2 years.
- Boomers are the least likely, with only 24% planning to use a traditional travel advisor.

Income differences

- Those with a lower HHI (<\$100k) are more likely to use a travel advisor than higher HHI earners (\$100k+) (55% vs. 48%).

LGBTQ+ and Other Prospects are equally likely to use a travel advisor for international holidays during the next 2 years.

% of Prospects Who Plan to Use a Travel Advisor for International Holidays During the Next 2 years

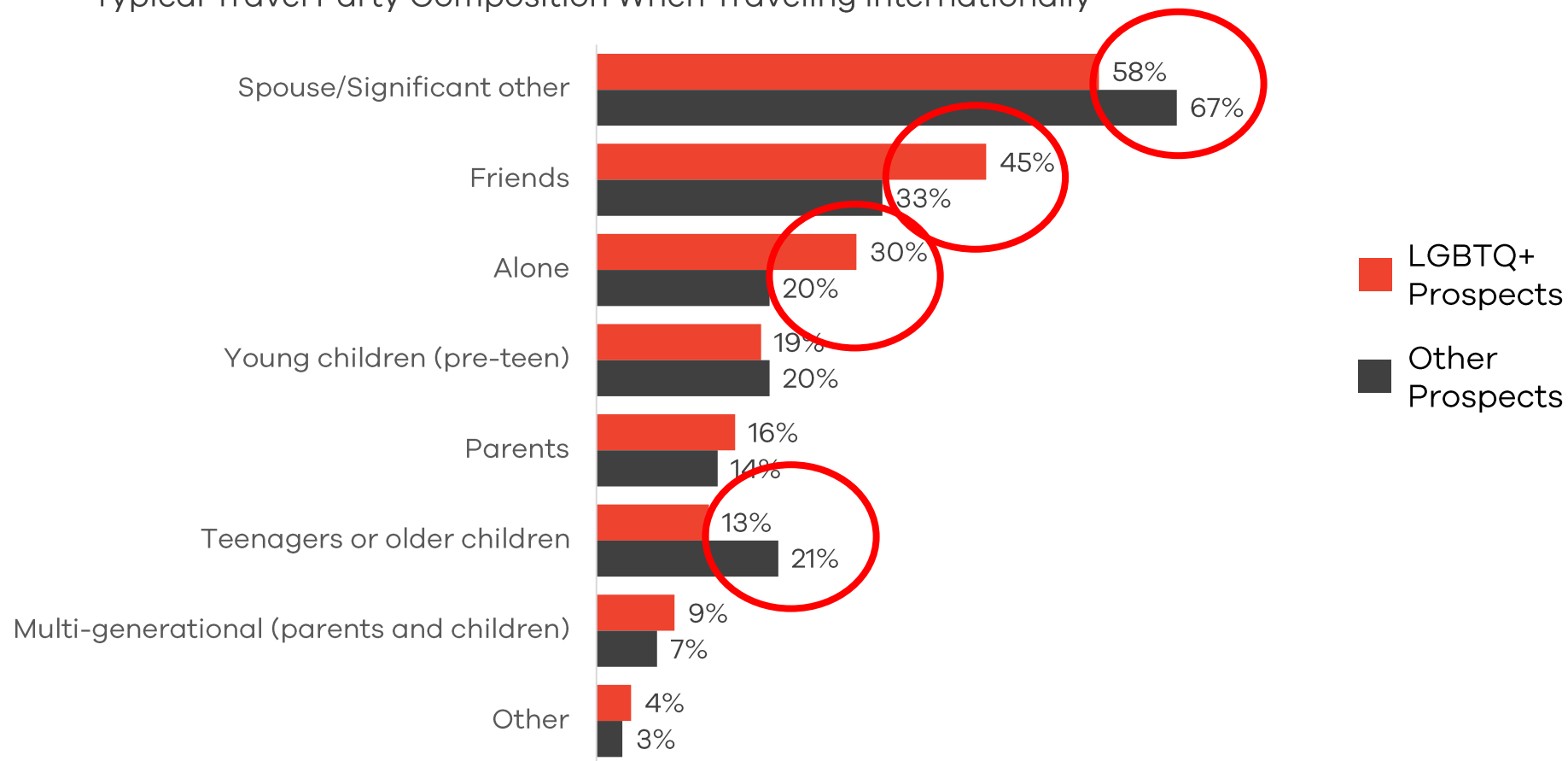


Differences:

- Usage of travel advisors over the past 3 years was higher amongst Other Prospects compared to LGBTQ+ Prospects (1.4 trips vs. 1.2 trips where travel advisors were used).

LGBTQ+ Prospects are significantly more likely to vacation solo or with friends.

Typical Travel Party Composition When Traveling Internationally



Base: American International Spain Travelers: (LGBTQ+ Prospects: n=274; Other travelers: n=1,237)

Source: MMGY Global's 2024 *Portrait of American International Travelers*™

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THANK YOU!



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