

Gay Travel Snapshot – Spring and Summer 2009

New online study shows GLBT travel shows more resilience

ROCHESTER, N.Y. and WASHINGTON, DC – May 4, 2009 – While Americans cope with new economic realities, many by shifting consumer priorities and curbing household expenses across-the-board, a new national survey conducted online by Witeck Combs Communications and Harris Interactive shows marked differences in travel expectations over the next four months. On balance, for all American adults sampled who also say they plan to travel in the next four months – gay, lesbian, bisexual and transgender (GLBT) consumers report *on average* they are likely to spend about \$2,300 between May and August 2009 for both leisure and business travel, while heterosexuals *on average* they are likely to spend about \$1,500 during that same period.

The new nationwide survey of 2,401 U.S. adults, (ages 18 and over), of whom 146 self identified as gay, lesbian, bisexual and transgender, was conducted online between April 13 and 21, 2009, by Harris Interactive, a global market research and consulting firm, in conjunction with Witeck-Combs Communications, Inc., a strategic public relations and marketing communications firm with special expertise in the GLBT market. Note that this survey was completed prior to the publicly reported cases of swine flu in Mexico City and the flu contagion.

The new survey also focused on ways that U.S. travel consumers plan to economize or to specifically reduce their leisure travel budget this summer – compared with their leisure travel last summer. For instance, when all adults who traveled a year ago were asked whether they would increase, decrease or take the same number of airline trips this coming summer – 6 out of 10 (62%) of GLBT respondents stated they would stay the same (55%) or increase (7%), while only 36% of heterosexuals also said they will stay the same (27%) or increase them (9%).

Likewise, both samples (that traveled last summer) were asked if they expected to spend more, less or about the same on travel this summer as they did a year ago. Nearly 6 out of 10 (58%) of GLBT adults reported plans to spend the same (53%) or more (5%) while 49% of heterosexuals reported plans to spend the same (39%) or more (10%).

George Carrancho, American Airlines' marketing manager responsible for outreach to GLBT consumers, and a member of the board of the International Gay & Lesbian Travel Association, said, "All travel marketers today are working harder than ever in this tough economy. From my experience, however, the very smartest ones also express their welcome and reputation for inclusion to gay and lesbian travelers, who are among our most consistent, loyal and profitable customers."

What strategies, in addition, will travelers apply to cut leisure travel costs in the next four months and where will they find savings? Gay and non-gay travelers, not surprisingly, think slightly differently. For example, when those who are cutting down on leisure travel spending were asked which of these actions (if any) they will take to reduce leisure travel expenses, here are the responses [and please note that the total number of GLBT responses is quite low, and therefore these specific findings should be considered directional]:

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- *Find less expensive activities:* 61% of heterosexuals agree, as do 51% of GLBT adults.
- *Find less expensive meal options:* 60% of heterosexuals agree, while only 42% of GLBT adults concur.
- *Find less expensive accommodations:* 69% of GLBT adults agree, while only 51% of heterosexuals say so.
- *Cook own meals rather than dine out:* 39% of heterosexuals think so, but only 24% of GLBT adults.
- *Stay with friends or family instead:* 39% of heterosexuals say fine, but only 26% of GLBT adults agree.
- *Take a “staycation” instead of vacation:* 32% of heterosexuals will stay home, but only 18% of GLBT adults will do the same.

“The global economy today throws a stark light on current travel and hospitality trends, and will clearly shape and reshape consumer plans for the rest of 2009,” said Bob Witeck, CEO of Witeck-Combs Communications. “All of us must cope, yet with these findings GLBT households again confirm that travel remains a comparatively strong priority even within shrinking household budgets.”

“Harris Interactive frequently conducts travel related survey research projects, including those focused on the GLBT marketplace. This is not the first time that we have unearthed consistent and significant differences between GLBT and heterosexual travelers,” said Allison Powell, Research Director for Harris Interactive’s Travel and Tourism Research Group.

Witeck added that, “Make no mistake; gay households, like all others, are struggling. No demographic research suggests these consumers are wealthier or better prepared during this economic downturn. Yet – they still believe that new destinations, new trips and new opportunities matter – which is a hopeful sign for all travel leaders.”

The online survey also gives further hint to these contrasting outlooks, for example when the entire sample of U.S. adults was asked their expectations for the nation’s economy as well as their own household’s financial condition. Among heterosexuals sampled, 39% predict U.S. economic improvement in the coming year, while 49% of GLBT adults responded the same. Moreover, when asked specifically about their own household financial conditions, over a third of GLBT households (34%) expect them to improve in the next 6 months (with 16% expecting them to worsen) – compared with 23% of heterosexuals expecting improvement, and 32% expecting them to worsen over the next 6 months.

TABLE 1
NUMBER OF LEISURE/BUSINESS TRIP DURING SUMMER

“How many leisure and/or business trips do you anticipate taking over the next four months (May – August)?”

BASE: All Adults

	Total	GLBT Adults	Heterosexual Adults
	# of Trips	# of Trips	# of Trips
Leisure Trips (average)	1.4	1.5	1.4
Business Trips (average)	0.8	1.0	0.7

TABLE 2
AMOUNT OF SPENDING ON LEISURE/BUSINESS TRAVEL DURING SUMMER

“Approximately, how much do you anticipate you will spend in total on [leisure travel/business travel] in the next four months (May – August)? Please consider spending to include transportation, accommodation, food/beverage, activities, etc... Please include spending on items that you will personally pay for (or your company will pay for).”

BASE: ALL ADULTS

	Total	GLBT Adults	Heterosexual Adults
	%	%	%
0	2	6	1
\$1 - \$499	26	23	27
\$500 - \$999	24	22	25
\$1000 - \$1999	23	22	24
\$2000 - \$4999	17	20	17
\$5000 +	7	7	7
Average	\$1,629	\$2,383	\$1,569

TABLE 3
OUTLOOK OF ECONOMY ON SUMMER TRAVEL PLANS

“Compared to your travel last summer (May – August 2008), how will your outlook on the US economy impact the leisure travel you anticipate taking this summer (May – August 2009)

BASE: ALL ADULTS WHO TRAVELED LAST SUMMER

	Total	GLBT Adults	Heterosexual Adults
	%	%	%
Number of leisure trips by plane			
Increase	9	7	9
Stay the same	29	55	27
Decrease	33	28	33
Not applicable	30	10	31
Amount spent on leisure trips			
Increase	10	5	10
Stay the same	40	53	39
Decrease	46	41	47
Not applicable	4	1	4

TABLE 4

ACTIONS TO TAKE TO REDUCE SUMMER LEISURE TRAVEL SPENDING

“Which of the following actions, if any, do you anticipate you will take in order to reduce your leisure travel spending this summer (May – August)?”

BASE: ADULTS WHO PLAN ON DECREASING SPENDING THIS SUMMER

	Total	GLBT Adults*	Heterosexual Adults
	%	%	%
Find less expensive activities	60	51	61
Find less expensive meal options	60	42	60
Find less expensive accommodations	52	69	51
Cook own meals rather than dine out	39	24	39
Stay with friends or family instead of hotel	39	26	39
Take a “staycation” instead of vacation	32	18	32

*Note: Small Base – use caution on interpreting results

TABLE 5

EXPECTATIONS TOWARDS ECONOMY

“In the coming year, do you expect the economy to... ?”

BASE: ALL ADULTS

	Total	GLBT Adults	Heterosexual Adults
	%	%	%
Improve	39	49	39
Stay the same	35	31	35
Get worse	26	20	27

TABLE 6
EXPECTATIONS CONCERNING HOUSEHOLD'S ECONOMIC SITUATION

“Thinking about your household’s financial condition, do you expect it to be better or worse in the next 6 months...?”

BASE: ALL ADULTS

	Total	GLBT Adults	Heterosexual Adults
	%	%	%
BETTER (NET)	23	34	23
Will be much better	5	8	5
Will be somewhat better	18	26	18
Will remain the same	46	49	46
WORSE (NET)	31	16	32
Will be somewhat worse	25	14	26
Will be much worse	6	2	6

Methodology

Harris Interactive conducted the study online within the United States between April 13 and 21, 2009, among 2,401 adults (ages 18 and over), of whom 2,196 indicated they are heterosexual and 146 self-identified as gay, lesbian, bisexual and transgender. Figures for age, sex, race, education, region and income were weighted where necessary to bring them into line with their actual proportions in the population. In addition, the results for the gay and lesbian sample were weighted separately based on profiles of the gay and lesbian population that Harris Interactive has compiled through many different online surveys. Propensity score weighting also was used to adjust for respondents’ propensity to be online.

All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, Harris Interactive avoids the words “margin of error” as they are misleading. All that can be calculated are different possible sampling errors with different probabilities for pure, unweighted, random samples with 100% response rates. These are only theoretical because no published polls come close to this ideal.

Respondents for this survey were selected from among those who have agreed to participate in Harris Interactive surveys. The data have been weighted to reflect the composition of the adult population. Because the sample is based on those who agreed

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to participate in the Harris Interactive panel, no estimates of theoretical sampling error can be calculated.

About Harris Interactive

Harris Interactive is a global leader in custom market research. With a long and rich history in multimodal research that is powered by our science and technology, we assist clients in achieving business results. Harris Interactive serves clients globally through our North American, European and Asian offices and a network of independent market research firms. For more information, please visit www.harrisinteractive.com.

About Witeck-Combs Communications, Inc.

Witeck-Combs Communications, Inc. is the nation's premier marketing communications and consulting firm, specializing in developing and implementing effective strategies reaching the gay and lesbian consumer market. With over 15 years experience in this unique market, Witeck-Combs Communications not only serves as a bridge between corporate America and gay, lesbian, bisexual and transgender consumers (GLBT), but also provides counsel to countless non-profit organizations that aim to educate the public on gay and lesbian issues or to better reach their GLBT membership.

In April 2003, American Demographics magazine identified Bob Witeck and Wes Combs as two of 25 experts over the last 25 years who have made significant contributions to the fields of demographics, market research, media and trendspotting for their path breaking work on the gay and lesbian market, and in 2006 Bob Witeck and Wes Combs co-authored **Business Inside Out: Capturing Millions of Brand Loyal Gay Consumers** (Kaplan Publishing), considered the first-ever book on marketing insights, practical tips and strategies targeting the gay, lesbian, bisexual and transgender market. They have appeared in worldwide media outlets including Fortune, CNBC, CNN, Reuters, Associated Press, Ad Age, New York Times and Washington Post. For more information visit www.witeckcombs.com.

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