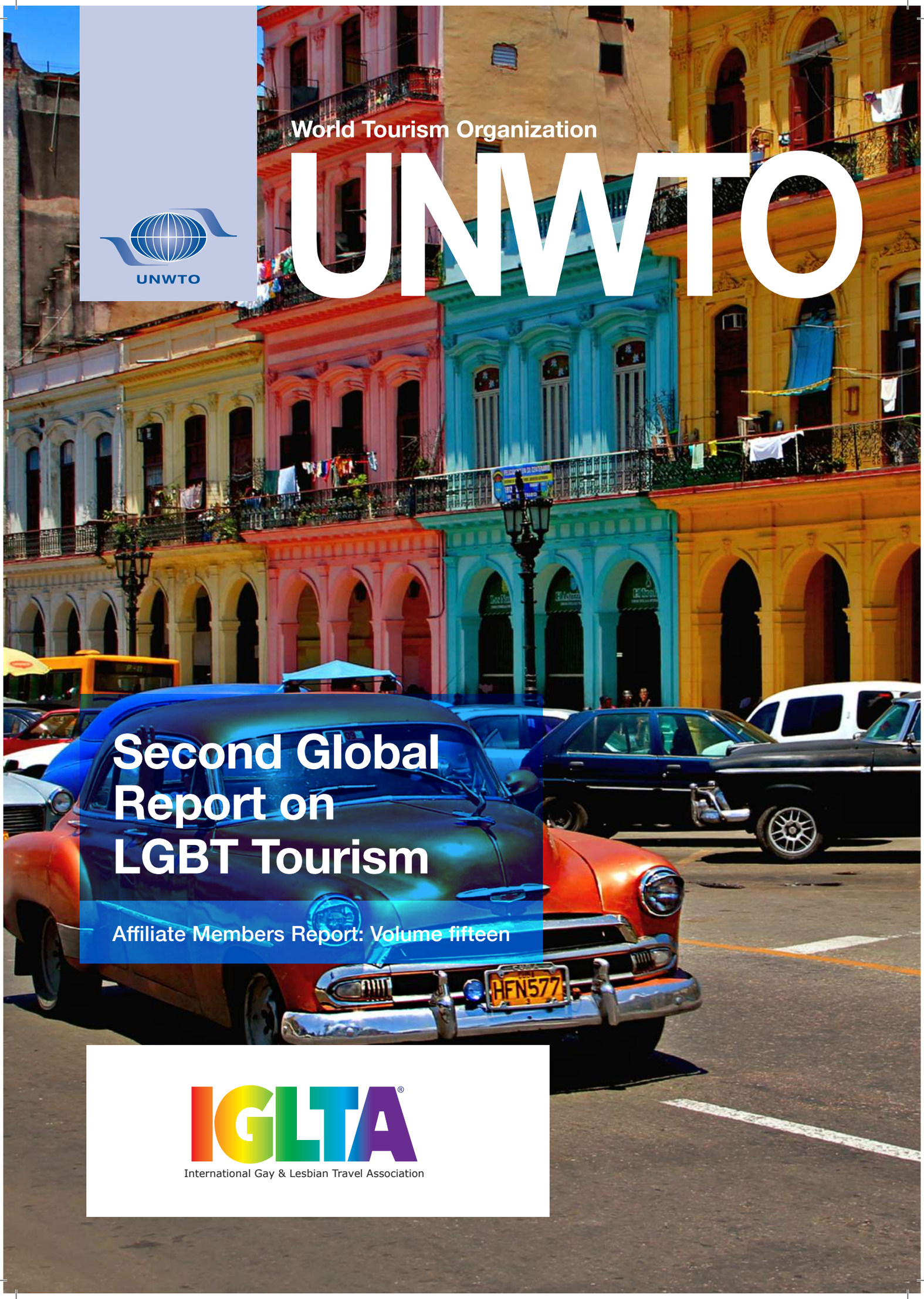



World Tourism Organization

UNWTO

# Second Global Report on LGBT Tourism

## Affiliate Members Report: Volume fifteen

IGLTA®

International Gay & Lesbian Travel Association

HFN577

# Second Global Report on LGBT Tourism

**UNWTO Editorial team**

AM Reports Management: Yolanda Perdomo, Director of the Affiliate Members Programme
Editorial Team: Addaia Arizmendi, Aditya Amaranggana, Alisa Barton, Beatriz Cano, Carmen Torregrosa, Malak Zungi and Elin Drysen (UNWTO Affiliate Members Programme)

Author: Peter Jordan (on behalf of the IGLTA Foundation)
UNWTO would like to sincerely thank the International Gay & Lesbian Travel Association (IGLTA) for this joint publication.

Copyright © World Tourism Organization, 2017
Cover photo: Copyright © Daryabriz | Dreamstime.com

**Affiliate Members Report, Volume fifteen – Second Global Report on LGBT Tourism**

ISBN (printed version): 978-92-844-1860-2
ISBN (electronic version): 978-92-844-1861-9

Published and printed by the World Tourism Organization (UNWTO), Madrid, Spain.
First printing: May 2017
All rights reserved.
Printed in Spain.

The designations employed and the presentation of material in this publication do not imply the expression of any opinions whatsoever on the part of the Secretariat of the World Tourism Organization concerning the legal status of any country, territory, city or area, or of its authorities or concerning the delimitation of its frontiers or boundaries.

This document has been prepared for the World Tourism Organization (UNWTO), however it reflects the views only of its authors, and UNWTO cannot be held responsible for any use which may be made of the information contained therein.

World Tourism Organization
Calle Capitán Haya, 42
28020 Madrid
Spain

Tel.: (+34) 915 678 100
Fax: (+34) 915 713 733
Website: www.unwto.org
E-mail: omt@unwto.org

**Citation:** ***World Tourism Organization (2017), Affiliate Members Global Reports, Volume fifteen – Second Global Report on LGBT Tourism, UNWTO, Madrid.***

UNWTO publications are protected by copyright. Therefore, and unless otherwise specified, no part of an UNWTO publication may be reproduced, stored in a retrieval system or utilized in any form or by any means, electronic or mechanical, including photocopying, microfilm, scanning, without prior permission in writing. UNWTO encourages dissemination of its work and is pleased to consider permissions, licensing, and translation requests related to UNWTO publications.

Permission to photocopy UNWTO material in Spain must be obtained through:

CEDRO, Centro Español de Derechos Reprográficos
Calle Monte Esquinza, 14
28010 Madrid
Spain

Tel.: (+34) 91 308 63 30
Fax: (+34) 91 308 63 27
Website: www.cedro.org
E-mail: cedro@cedro.org

For authorization of the reproduction of UNWTO works outside of Spain, please contact one of CEDRO's partner organizations, with which bilateral agreements are in place (see: http://www.cedro.org/en).

For all remaining countries as well as for other permissions, requests should be addressed directly to the World Tourism Organization. For applications see: http://publications.unwto.org/content/rights-permissions.

GREATER FORT LAUDERDALE hello sunny

IGLTA and UNWTO would like to express their gratitude for the kind financial support provided by the Greater Fort Lauderdale Convention and Visitors Bureau towards the production of this report.

TRAVEL.
ENJOY.
RESPECT.
#TRAVELENJOYRESPECT

# Table of Contents


8 Foreword by Taleb Rifai, UNWTO Secretary-General
9 Welcome message from John Tanzella, President/CEO, IGLTA
10 Introduction by Yolanda Perdomo, Director of the UNWTO Affiliate Members Programme

12 **Chapter 1: What is LGBT tourism?**

12 1.1 Background and introduction
14 1.2 What is LGBT tourism?
15 1.3 A brief history of LGBT tourism

18 **Chapter 2: The state of LGBT rights around the world**

22 2.1 LGBT rights and tourism

24 **Case study 1**: Interview with Rika Jean-Francois, Commissioner, ITB Corporate Social Responsibility

26 **Case study 2**: "We're on a Journey", Virgin Holidays: Taking steps to raise awareness of opportunities in the LGBT market and encourage tolerance in travel destinations

28 2.2 The United Nations and LGBT rights
32 2.3 The case for LGBT inclusion and diversity in destinations

40 **Case study 3:** Considering the changing vacation preferences of LGBT travellers, Ernst & Young LLP

42 2.4 Understanding the LGBT consumer

46 **Case study 4**: A community of practice: A theoretical take on LGBT travel behaviour, The Ostelea School of Tourism and Hospitality

48 **Chapter 3: The impact of same-sex marriage on the tourism sector**

48 3.1 Equal marriage – an overview
52 3.2 The impact of equal marriage on the tourism sector

56 **Case study 5:** The economic impact of marriage equality in New York City: a continuing gift to the city, NYC & Company

58 **Case Study 6:** Orienting the Region of Valencia towards LGBT travellers from around the world, Valencia Region Tourist Board

60 **Chapter 4: Key trends in LGBT tourism**

60 4.1 The diversification of products and destinations for LGBT travellers

64 **Case Study 7:** Understanding tourist consumer behaviour in order to develop a specific LGBT tourism product in Vietnam, Vietnam National University

66 4.2 The status of LGBT consumers in emerging outbound markets
70 4.3 The emergence of the millennial LGBT traveller
74 4.4 Meeting the needs of multiple generations of LGBT travellers
76 4.5 Understanding the transgender traveller

78 **Case Study 8:** Interview with Richard Gray, Managing Director, LGBTQ Market, Greater Fort Lauderdale Convention & Visitors Bureau (CVB)

80 **Chapter 5: Putting your destination on the LGBT traveller's map**

80 5.1 Recommendations
82 5.2 Why should mature LGBT destinations continue to actively engage with the LGBT market?

88 **Case Study 9:** NYC & Company's approach to LGBT destination marketing

90 **Case Study 10:** Diversity: a part of Barcelona's DNA, Turisme de Barcelona

92 **Case Study 11:** A Snapshot of Vienna, an iconic destination for LGBT travellers, World Federation of Tourist Guide Associations

94 **Case Study 12:** Argentina World Friendly: The International Promotion of LGBT Tourism Products, Singerman & Makón LATAM Tourism Consulting and Cámara de Comercial Gay Lésbica Argentina

96 5.3 Where to start? Guidelines for travel brands and destinations that are making their first approach to the LGBT market

100 5.4 Quick tips for effective LGBT destination marketing

102 List of acronyms and abbreviations

104 References

# Foreword

**Taleb Rifai, UNWTO Secretary-General**

Over the past decades, tourism has experienced continued growth and diversification to become one of the fastest-growing economic sectors in the world, accounting for 7% of worldwide exports, one in every eleven jobs and 10% of the world's GDP. The sector, if well managed, can become a catalyst for economic prosperity, social inclusion, peace and understanding, along with cultural and environmental preservation.

In line with this, the designation by the United Nations of 2017 as the International Year of Sustainable Tourism for Development serves as a unique opportunity to recognize and further unleash the immense potential that tourism has to offer in advancing the universal 2030 Agenda for Sustainable Development and the 17 Sustainable Development Goals (SDGs).

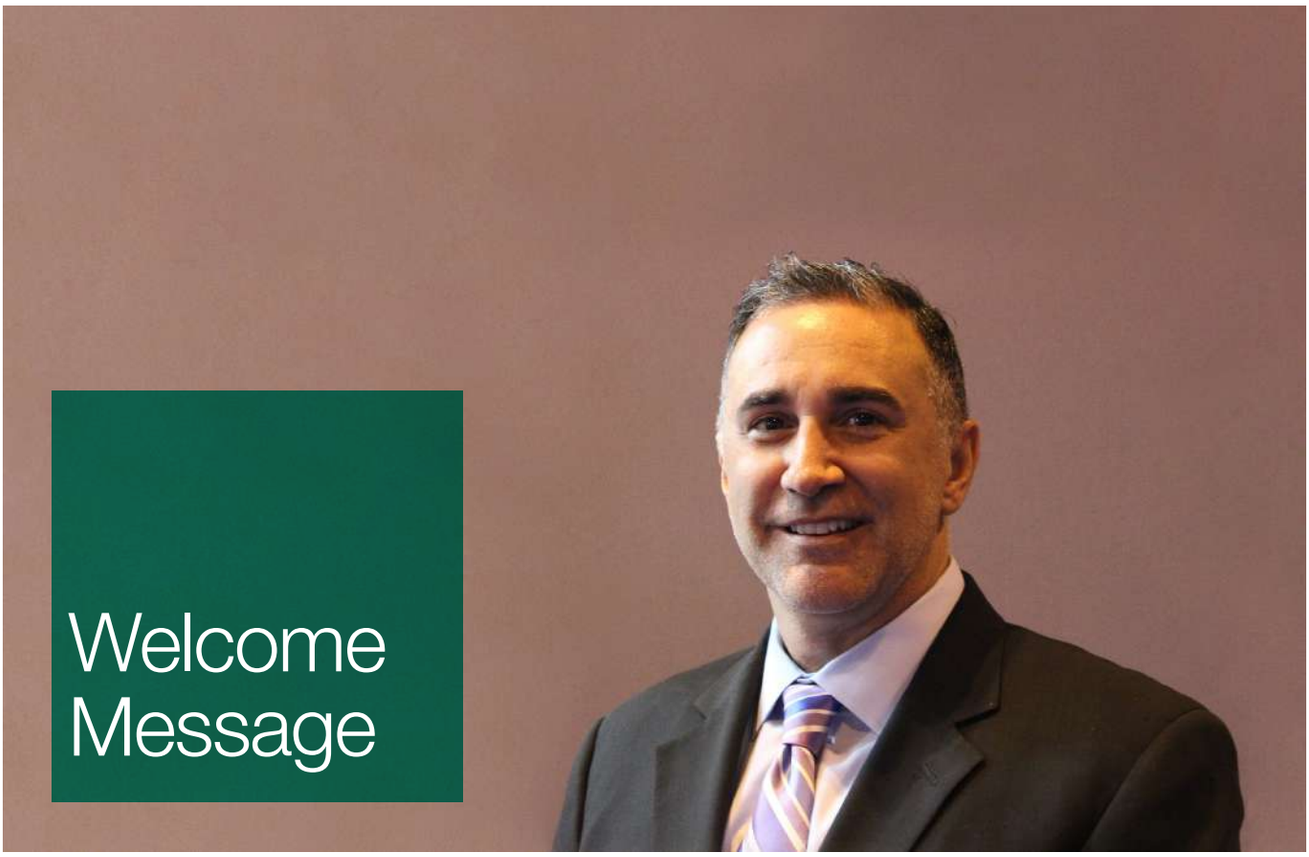
Lesbian, gay, bisexual and transgender (LGBT) tourism has experienced a significant increase in recent years. Gradually, this dynamic segment has proven its capacity to become a powerful vehicle for economic development.

Yet the positive impacts of LGBT tourism reach far beyond mere economic benefits. Indeed, destinations welcoming LGBT tourism convey a powerful image of tolerance and respect. Destinations advocating LGBT rights consequently become significant global advocates of universal human rights. The *Second Global Report on LGBT Tourism* is an excellent reference for all tourism stakeholders interested in harnessing the potential that LGBT tourism can offer. It provides a greater understanding of the interests of the LGBT market and therefore the ability to adapt destinations to these interests.

Recalling the words of the UNWTO Global Code of Ethics for Tourism – which highlight 'the "decisive and central" role of this Organization, as recognized by the General Assembly of the United Nations, in promoting and developing tourism with a view to contributing to economic development, international understanding, peace, prosperity and universal respect for, and observance of, human rights and fundamental freedoms for all without distinction as to race, sex, language or religion', I invite all tourism leaders to provide a supportive environment for LGBT tourists, in order to associate our sector with open-minded and tolerant activities that embrace differences between peoples, cultures and lifestyles.

We have a collective responsibility to stand against discrimination, fight stereotypes and become vehicles for social change. I therefore call upon each of you to embrace the benefits associated with LGBT tourism and become ambassadors for mutual understanding and respect of universal human rights. Together, we can work towards shaping a more respectful, inclusive and tolerant future in tourism.

I would like to thank all UNWTO Member States, Affiliate Members and partner organizations who have contributed to this report. I trust that it provides an important contribution to the development of LGBT tourism, and most importantly, to advancing LGBT rights worldwide.



# Welcome Message

**John Tanzella, President/CEO, IGLTA**

The International Gay & Lesbian Travel Association (IGLTA) takes particular pride in collaborating on projects that further dialogue for lesbian, gay, bisexual and transgender (LGBT) tourism worldwide, and so it is with great excitement that we introduce the *Second Global Report on LGBT Tourism* in partnership with the World Tourism Organization (UNWTO).

Much has changed since IGLTA became the first LGBT organization to join the UNWTO Affiliate Member programme and collaborated on our inaugural report, released in 2012. We've seen many more countries enact laws to treat LGBT citizens as equals – particularly in terms of recognizing our relationships – and witnessed increased LGBT visibility and mainstream support.

However, there are still more than 70 countries where homosexuality is criminalized, and in some instances punishable by death. We also know that rights can be taken away in governmental shifts, and so progress cannot be taken for granted. It is essential for the UN to continue its commendable work of the last eight years to combat discrimination and seek equal rights for LGBT citizens of the world.

As this report demonstrates, the economic and social benefits for destinations and businesses that stand up for equality and inclusion far outweigh any backlash. The more that LGBT people are able to move through the world freely, to find places that are safe and welcoming, the more the travel industry has benefitted. Destinations that treat their LGBT citizens with respect are not only attractive for LGBT travellers, but also to the friends, families and allies who love and support them.

We look forward to working with UNWTO through our Association and our philanthropic IGLTA Foundation to engage and educate destinations that wish to reach this diverse segment of global travellers. Thank you to UNWTO for its support, and to all those who contributed insights and case studies to this report.

**About IGLTA & the IGLTA Foundation**

The International Gay & Lesbian Travel Association, founded in 1983, is the leading member-based global organization dedicated to LGBT tourism and a proud Affiliate Member of the United Nations World Tourism Organization. IGLTA's mission is to provide information and resources for LGBT travelers and expand LGBT tourism globally by demonstrating its significant social and economic impact. The association's membership includes LGBT and LGBT-friendly accommodations, destinations, service providers, travel agents, tour operators, events and travel media in 70 countries. In 2012, the philanthropic IGLTA Foundation was created to support the mission of the association and its membership through education, research and leadership development.

# Introduction

**Yolanda Perdomo,**
**Director of the Affiliate Members Programme**

The UNWTO Affiliate Members Programme, together with the International Gay and Lesbian Association (IGLTA), are proud to present the *Second Global Report on LGBT Tourism*.

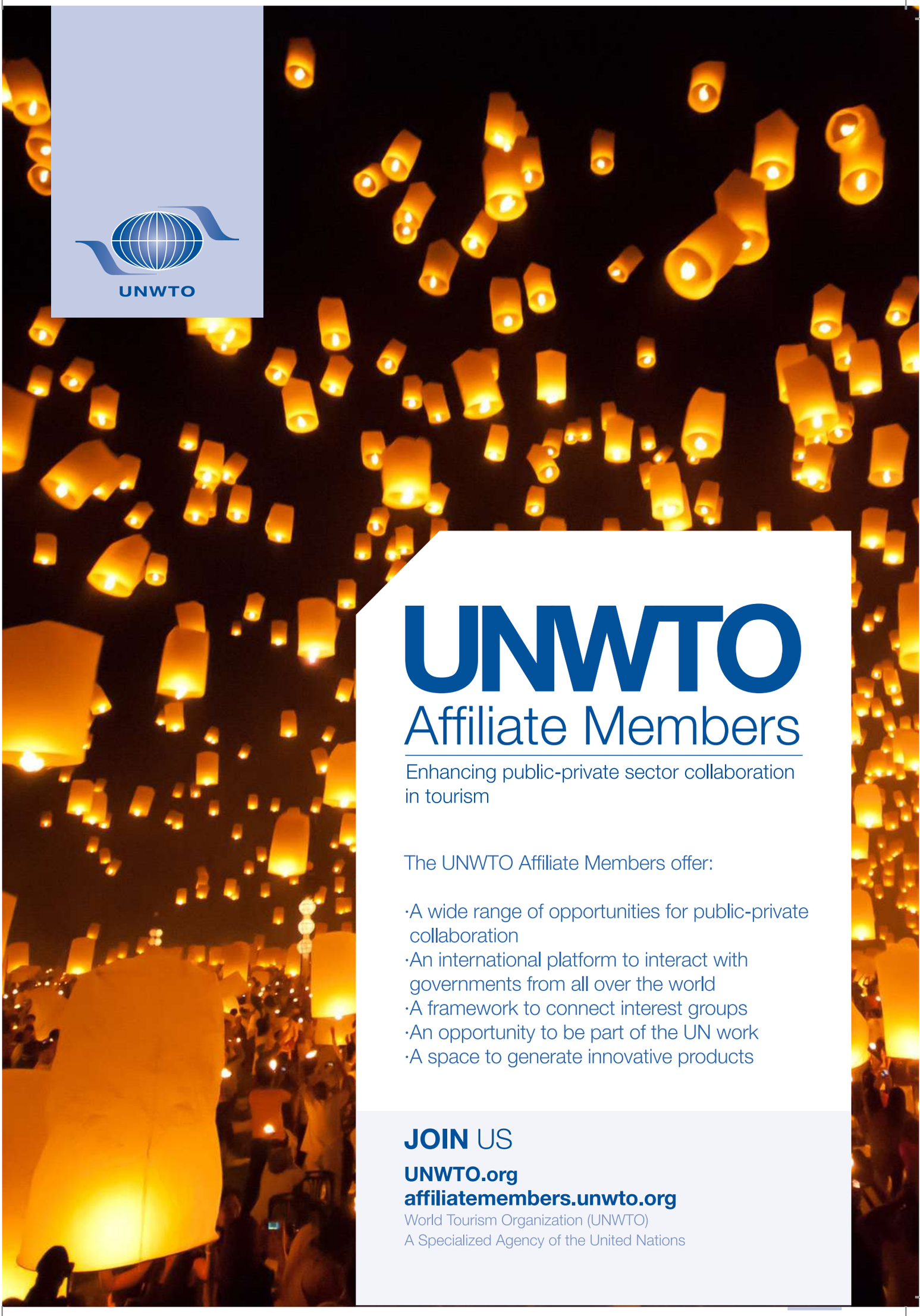
LGBT tourism has proven to be a powerful vehicle for the economic development of a region, in addition to the environmental and, most importantly, social benefits. Indeed, LGBT tourism contributes in enhancing the visibility, role and recognition of LGBT people, and benefits destinations by associating their brand image with acceptance, inclusiveness and diversity. The continuous expansion being experienced by this segment nowadays reflects the great array of opportunities it presents for tourism stakeholders and destinations in particular. In order to correctly harness the existing potential within this segment, there is a need to overcome the challenge of correctly understanding and adapting the tourism offer to the preferences and needs of the diverse LGBT travellers.

The first edition of the UNWTO *Global Report on LGBT Tourism* published jointly with IGLTA in 2011, provided an overview of the state of LGBT rights in the world and assessed the socio-economic impacts of LGBT travel on destinations. In the space of five years, there have been significant changes with regard to the visibility, role and recognition of LGBT people in a global society and the global importance of LGBT tourism in the international tourism scene, therefore the necessity to develop a second edition.

Mindful of the above, UNWTO and Affiliate Member International Gay and Lesbian Association (IGLTA) have decided to join forces once again, embarking in the preparation of this *Second Global Report on LGBT Tourism*. This edition will offer a more extensive analysis of the sector, current trends and of the LGBT traveller's profile, providing useful guidance for tourism stakeholders and particularly destinations that are interested in attracting this type of tourism. Among others, the diversity and complexity inherent in the LGBT consumer is explored, providing a corresponding set of recommendations for tourism stakeholders to better understand it. The publication is enriched by a comprehensive compilation of case studies that provide valuable real-life experiences of tourism stakeholders who have benefited from their outreach to LGBT travellers.

To this end, I would like to express my deep appreciation for the International Gay and Lesbian Association (IGLTA), our valuable collaborator on this report. IGLTA has proven its effective leadership role in the field of LGBT travel and its commitment in supporting the advancement of this segment around the globe. Furthermore, my gratitude is extended to our precious Affiliate Members, Agència Valenciana del Turisme, Ernst & Young LLP, OSTELEA School of Tourism and Hospitality, Turisme Barcelona, and World Federation of Tourist Guide Associations (WFTGA), for generously sharing their insights and immensely contributing to enriching the content in this publication.

I trust that this publication will serve as a valuable tool for the tourism community, contributing to advancing knowledge on LGBT Tourism and to facilitate its understanding, thus becoming an excellent reference for all tourism stakeholders interested in engaging in LGBT Tourism and fully harnessing the promising potential it has to offer.



UNWTO

# UNWTO Affiliate Members

Enhancing public-private sector collaboration in tourism

The UNWTO Affiliate Members offer:

- A wide range of opportunities for public-private collaboration
- An international platform to interact with governments from all over the world
- A framework to connect interest groups
- An opportunity to be part of the UN work
- A space to generate innovative products

**JOIN** US

**UNWTO.org**
**affiliatemembers.unwto.org**

World Tourism Organization (UNWTO)
A Specialized Agency of the United Nations

# Chapter 1:
## What is LGBT tourism?

## 1.1
## Background and introduction

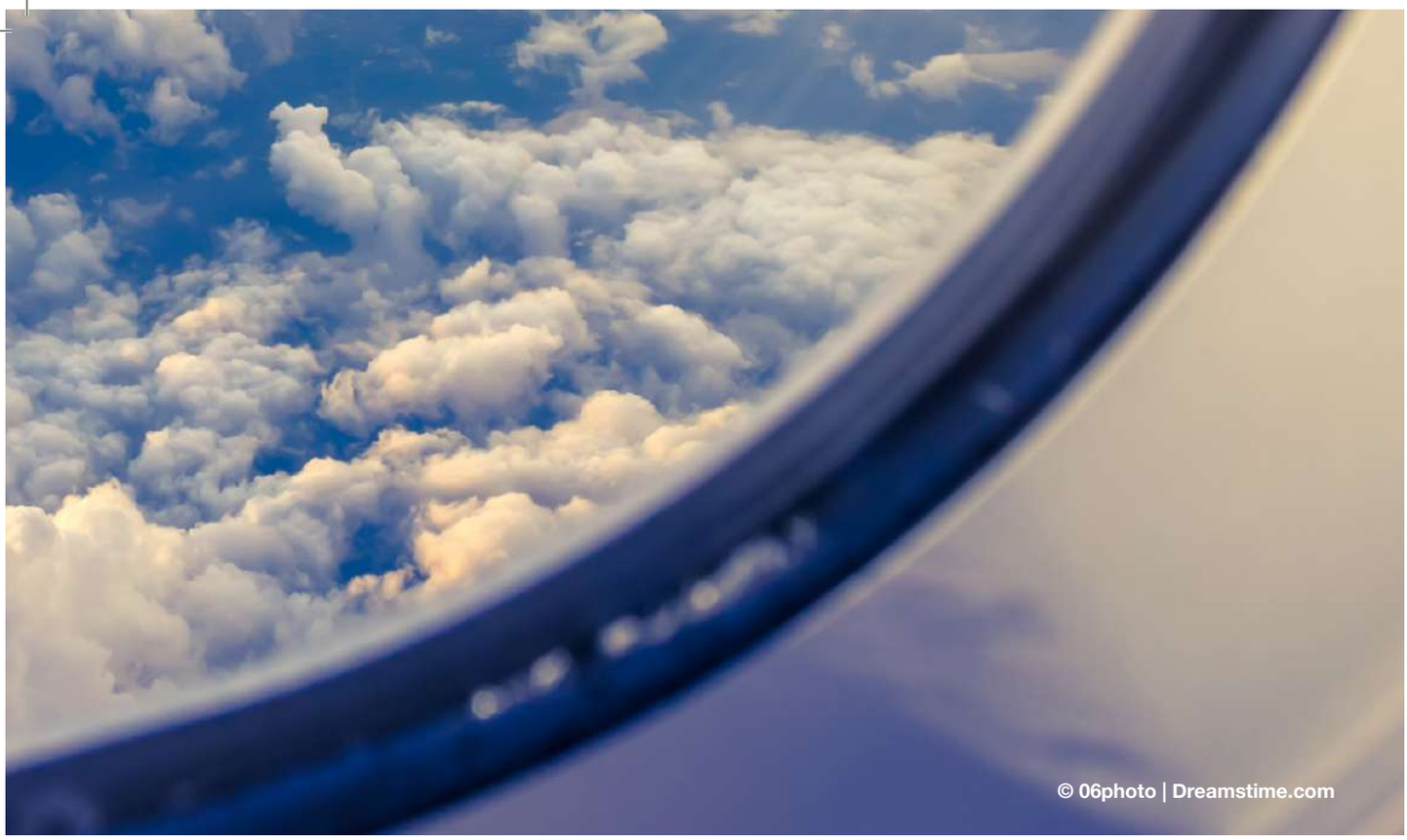
In 2012, UNWTO in partnership with the International Gay & Lesbian Travel Association – the first LGBT organization to join UNWTO as an Affiliate Member – published the first UNWTO *Global Report on LGBT Tourism*. The report provided an introduction to LGBT travellers as a diverse and burgeoning segment of consumers and gave an overview of the social and economic impact of LGBT travel on destinations. It also presented a series of case studies from national and municipal destination marketing organizations (DMOs) on marketing campaigns directed at the LGBT segment of global travellers from destinations as diverse as Spain, South Africa, the United States, Brazil and Argentina. The report also featured a small selection of tour operators that were operating in emerging destinations. At the time of writing the first edition is still available online via the UNWTO Elibrary, providing useful insights to those wishing to become acquainted with the concept of LGBT travel.

In the space of five years since the first edition of this report was published, significant changes have occurred with regard to the visibility, role and recognition of LGBT people in global society. Mostly these changes have been positive, enabling LGBT people to be given equal rights and protection from discrimination under the law. However in some places these changes have been negative; these changes will be discussed in more detail in this report.

### 1.1.1 Reaching new market segments as a means of increasing competitiveness

As travel and tourism marketing has shifted online, destinations have increasingly found themselves competing in a global marketplace. Over the past six decades, almost without interruption, the volume of cross-border travel has increased year-on-year, and today travellers are able to access their chosen destinations more easily. In order to stand out, those responsible for destination marketing have sought to make their destinations attractive to emerging consumer segments, particularly those segments of the market that are perceived to travel more frequently and exhibit higher levels of spending than others.

While data is continually sought to explain these trends, LGBT travellers have become recognized as a segment that travels with greater frequency and demonstrates




higher-than-average patterns of spending. Social change and improvements in the legal recognition and protection of LGBT people around the world have meant that LGBT consumers have gradually become more visible and with this, more easily targeted as a consumer segment.

Broadly there are three main groups within the destination marketing community that we have identified as relevant when preparing this report: destinations which are looking to put themselves on the map for the global LGBT travelling public for the first time; established destinations in this market that are looking to diversify their LGBT offerings, and; both mature and emerging destinations that are seeking to understand the profile and characteristics of LGBT consumers from emerging outbound markets.

As the world's leading global travel network dedicated to connecting and educating LGBT travellers and the businesses that welcome and support them, IGLTA and its philanthropic IGLTA Foundation have become a key resource for businesses and destinations wishing to understand these areas of growth for the global tourism sector. The UNWTO Affiliate Members Programme has worked in close partnership with IGLTA to present this report on emerging trends in LGBT tourism. It will help the reader to understand the characteristics of emerging outbound markets of LGBT travellers as well as best practices in LGBT destination marketing. It also provides a useful guide to destinations looking to become attractive to what is, in reality, a highly diverse segment of global consumers.

# 1.2 What is LGBT tourism?

According to IGLTA, LGBT tourism refers to the development and marketing of tourism products and services to lesbian, gay, bisexual or transgender people. Some products and services are designed specifically with LGBT travellers in mind, for example honeymoons and wedding ceremonies for same-sex couples, or accommodation or tours exclusively designed for groups of gay men or lesbian women. In other cases, destinations or travel service providers (e.g., airlines, hotel chains) seek to assure the LGBT consumer that when visiting their destination or purchasing their product or service that they will be welcome and respected.

As this report will explain, LGBT people are extremely diverse. Some may willingly identify themselves as lesbian, gay, bisexual or transgender while others may not. However, research has shown that when destinations and travel businesses (as well as businesses in other sectors) carry out specific marketing actions targeted at LGBT consumers that are backed up with good LGBT-relevant practices in human resources and corporate social responsibility, this consumer group frequently responds with increased brand awareness and loyalty.

# 1.3 A brief history of LGBT tourism

© Grondin Franck Olivier | Dreamstime.com

The LGBT community certainly was traveling long before the International Gay & Lesbian Travel Association formed in 1983, seeking out welcoming spots in cities from Berlin to New York. But as global rights and recognition have expanded, so has the visibility of gay tourism. The following section gives an overview of the notable events and innovations that have defined the development of LGBT tourism so far:[1]

## Publications

The creation of publications targeted at gay male travellers was probably the earliest recognition of this segment as one having specific interests and needs. The first of such examples was the gay men's travel guide *The Damron Address Book* published in 1964 by the Damron Company based in the United States of America, followed by the first edition of the German-produced *Spartacus International Gay Guide* in 1970. Today LGBT travellers can choose from a range of online guides provided by DMOs, travel agents, tour operators, media outlets and travel bloggers.

## Events

In June 1969 the Stonewall Riots in New York gave birth to a global gay rights movement that over time led to worldwide Pride-themed tourism. Today there are thousands of Pride marches in towns and cities around the world from the largest (Sao Paolo, Brazil, with 3.5 million participants) to the smallest (Sligo, Ireland, with around 100 participants). WorldPride events become a focus of worldwide activism and celebration (Madrid, 2017; New York, 2019) while other events such as the Gay Games (first held in 1982 in San Francisco) and diverse cultural festivals are held around the world to promote LGBT equality and raise awareness of LGBT rights.

## Speciality tours and resorts

Over the decades, some pioneering companies have set up tours to help LGBT people meet, socialise and travel safely around new destinations. In 1973 Hanns Ebensten, widely considered the father of gay travel, ran his first tour – a trip down the Grand Canyon's Colorado River. Today, specialist travel agents and tour operators take LGBT people, their friends and families to some of the most exotic, far-flung locations on earth.

## LGBT travellers on the corporate radar

Many multinational corporations in the tourism sector have played their part in supporting LGBT people in the workplace and showing a welcoming face to LGBT customers. Often, where lawmakers have lagged behind in promoting equal rights for LGBT people, corporations that operate across many borders have taken up this cause, or sought to promote LGBT-friendly policies towards their customers and employees, even in countries where LGBT people face severe discrimination. This is discussed in more detail later in this report.

## Same-sex marriage

In 2001 the Netherlands was the first country to legalize same-sex marriage. The gradual introduction of both registered partnerships and full rights to marry for same-sex couples in more countries has marked an important step forward for LGBT people as it signifies another step towards acceptance and symbolises a cultural shift towards greater equality in the places where it is introduced. As more couples have been able to marry around the world, the tourism sector has benefitted from the resulting increase in terms of destination weddings, honeymoons and even pre-wedding celebration trips. This is discussed in more detail later in this report.

## Destination marketing breaks new ground

During the 1980s, as LGBT communities started to become established and more visible in major city and beach destinations in North America and Western Europe, the authorities in some of these destinations decided to highlight this in their tourism marketing, so as to attract the LGBT traveller. In the United States, typically this started with the formation of local LGBT chambers of commerce, which would then carry out tourism marketing activities, while in Europe, city and regional tourism boards would work with local LGBT-oriented business owners to do this. Gradually destination marketing to LGBT consumers has become more widespread, with national and local tourism boards in many countries carrying out overseas marketing campaigns, creating online microsites for LGBT consumers and forming partnerships with the business community to develop specific products of interest to the LGBT traveller.

## Business networks for education and commerce: The IGLTA Years

In 1983 a small group of travel agents and guesthouse owners created IGTA, the International Gay Travel Association, in South Florida (the "L" was added in 1997). Today the association has a truly global presence with member businesses in more than 70 countries representing LGBT-friendly accommodations, destinations, service providers, travel agents, tour operators, media and events, as well as the LGBT travel consumers they wish to serve. In 2010 a milestone was reached when the Association became the first LGBT organization to become an Affiliate Member of the World Tourism Organization (UNWTO). Two years later, the non-profit IGLTA Foundation was created and officially introduced to the membership at the Annual Global Convention in Florianopolis, Brazil, IGLTA's first convention in South America. The IGLTA Foundation supports initiatives for industry organizations, businesses and communities to advance LGBT tourism globally, with an emphasis on education, research and developing the next generation of LGBT tourism leaders.

# Chapter 2:
## The state of LGBT rights around the world

This report primarily focuses on people who are lesbian, gay, bisexual or transgender as consumers, in this case consumers of travel. However in a world where LGBT people continue to face persecution and discrimination, it is also appropriate to consider the rights and wellbeing of LGBT people and examine how the tourism sector – both public and private organizations – can contribute to addressing these issues.

Article One of the United Nations Universal Declaration of Human Rights states that "all human beings are born free and equal in dignity and rights".[2] However, people around the world continue to face severe inequality because of their sexual orientation or gender identity. In September 2016, the former UN Secretary-General Ban Ki-moon described the "outrage" of the fact that "every year, hundreds are killed, thousands are badly hurt, and millions live their lives under a shadow of discrimination and disapproval".[3]

> *"Recognizing that gay people have equal rights is one of the few things a government can do that makes lots of voters very happy while costing no one else a penny".*[4]
>
> The Economist, 19 October 2014

Globally, the difference in living conditions and legal protection of LGBT people in recent years has become more extreme. While countries across Western Europe, North and South America have taken significant steps to decriminalise same-sex relationships and give legal recognition to same-sex couples, others are, in the words of Mr. Ban, "bucking the tide of history with draconian new punishments for being gay – or even just talking about being gay".[5]

A speech by Flavia Pansieri, United Nations Deputy High Commissioner for Human Rights, in November 2015 summarised the abuses of LGBT people that had been documented in various reports by the Office of the Commissioner for Human Rights:[6]

- Murders of LGBT persons;
- Rapes of lesbian and bisexual women;
- Violent mob attacks;
- Abuse of LGBT persons by police and prison officials;
- Criminal sanctions, arrest, imprisonment, blackmail and harassment of LGBT persons on the basis of their sexual orientation or their gender expression;

- Treatments and surgeries forced on LGBT and intersex persons in medical settings to try to change their sexual orientation, or forced sterilization of transgender persons;

- Humiliation and discrimination faced by transgender persons who are denied recognition of their gender identity;

- Bullying of children in schools, lack of protection from the State;

- LGBT and intersex persons fleeing death threats in their countries of origin only to be discriminated against in the asylum process; and

- LGBT people being fired from their job evicted from their home or refused medical treatment simply because of who they are or whom they love.

As the Deputy-Commissioner observes: "these constitute human rights violations, often perpetrated with impunity, sometimes with the participation, complicity or inaction of State authorities, and with victims seldom having access to effective remedy for these violations"[7].

Even in countries which offer strong legal protection to LGBT people against discrimination, LGBT people can face discrimination or intimidation at home, at school, in the workplace or in social settings, leading to lifelong mental health issues and challenges in forming loving relationships. Hence, the documentation and advocacy work of human rights defenders and civil society organizations is a continual process as they appeal to the authorities in their respective countries to take steps at the national level and recognize the need to act collectively – including at the UN – to address the violations that LGBT and intersex people face.

Fortunately, in recent years many countries have taken effective measures to combat discrimination. These include removing criminal sanctions for consensual same-sex conduct, legal prohibition of discrimination on the basis of sexual orientation, gender identity and intersex status, legal recognition of the gender identity of transgender persons without abusive requirements, legal recognition of same-sex couples and their families, protections for the physical integrity of intersex children, public education and awareness raising campaigns to combat homophobia and transphobia, establishing shelters for homeless LGBT and intersex youth, and anti-bullying initiatives in schools. Individual cities have also been pioneers in combatting homophobia and transphobia, which in turn have transformed the debate at national level in their respective countries.[8] There have also

been many firsts as the subject of LGBT equality has been brought up for the first time in forums such as the European Council and individual parliaments.[9]

Safeguarding the rights of LGBT people has also become a subject of focus in international diplomacy, as aid-donors such as the European Union or individual states have applied pressure on governments which have been less protective of equal rights for LGBT citizens to improve this situation in exchange for continued support. In some cases they have funded LGBT initiatives, such as Pride marches or healthcare support directly. This has been a contentious issue in countries where governments have tried to politicise same-sex sexual activity or relationships, turning public support against LGBT demands for special rights when in fact LGBT activists seek fair and equal treatment for LGBT people under the law.

The work of ensuring equal rights for LGBT citizens and improving their quality of life does not end with a change in the law. Preparing for a changing in the law and ensuring that it is properly implemented with the full cooperation of law-enforcement agencies means setting up educational campaigns, sensitization campaigns and addressing these issues through the education system too.[10]

Finally, with regard to the legal recognition of same-sex couples, this political step has, in some respects, become a *beacon of hope* for LGBT people around the world, whichever the realities of life in their particular place of origin. The effect of this on the tourism sector will be discussed in further detail in chapter three of this report.

In spite of the progress that has been made around the world, ILGA Europe outlines a number of reasons why political leaders must continue to show leadership on LGBT equality:[11]

- We cannot take the positive developments of the past decade for granted; since they can easily come under threat;
- In several countries, the space available for human rights defenders to promote and advocate for human rights in general, and the rights of LGBT people specifically, continues to shrink;
- Peaceful and protected pride events continue to be a marker of positive change. Their peaceful celebration is an indication of society's attitudes and the willingness of authorities to protect the rights of LGBT individuals;
- Strong policies only become effective when coupled with dedicated implementation; and
- Political leadership is a crucial ingredient in the recipe for change.

# 2.1
# LGBT rights and tourism

The intersection of leisure travel – of freedom, enjoyment, and recreation – and the issues of discrimination, persecution and abuse can prove highly polarising for many people. As a non-governmental organization, the IGLTA Foundation encourages travellers to be aware and take care of their personal safety. The Foundation also calls for equal and respectful treatment by governments and businesses towards LGBT travellers.

In considering the relationship between LGBT rights and the *right to travel*, the IGLTA Foundation highlights the following key points:

- **It is essential to look beyond the national level.** While an important indicator of political attitudes, political discourse at national level does not always reflect the day-to-day reality of life for LGBT people across a whole country.

- **Change sometimes comes from city or regional level.** This has been the case where, for example, regional governments or states have competence over marriage legislation and pressure for change arises from the established LGBT community in that constituency. While those campaigning for equal rights may ultimately seek change at national level that benefits all citizens, capital cities or destinations that attract large numbers of LGBT travellers may prove to be the starting point of change at national level.

- **Hostility towards LGBT people can cause damage to a country's brand reputation**. 24-hour news and social media have helped people to become much more aware of global issues and the way of life for people far away. A perceived restriction of rights for a group of citizens can be rapidly reported and shared, as well as cases of police brutality or hostile comments among political decision makers. Incidents such as these can quickly become part of the narrative about the country or region as a whole, and shape how consumers (both LGBT and non-LGBT) perceive the country as a potential tourist destination.

- Reflecting the rich diversity of the human race, **LGBT people are highly diverse**. There are LGBT people in every country in the world; however their stories and voices are often melted into one narrative. Therefore it

is important to note that, as with travellers in general, a LGBT person's experience may vary widely depending on gender expression, skin colour, citizenship, income, or ability. There is no one type of person, or one singular experience of travelling as a LGBT person.[12]

- **All travellers should check local laws before travelling. While travelling, they should respect local laws and customs.** While the IGLTA Foundation advocates for safe travel and respect for LGBT people, it recognizes that all travellers should review local laws before travelling and respect local cultural norms. Travellers should also carry the details of their country's embassy to contact in case of an emergency.

# Case study 1:
## Interview with Rika Jean-François, Commissioner, ITB Corporate Social Responsibility

**Why does ITB include LGBT travel within its responsible tourism program?**

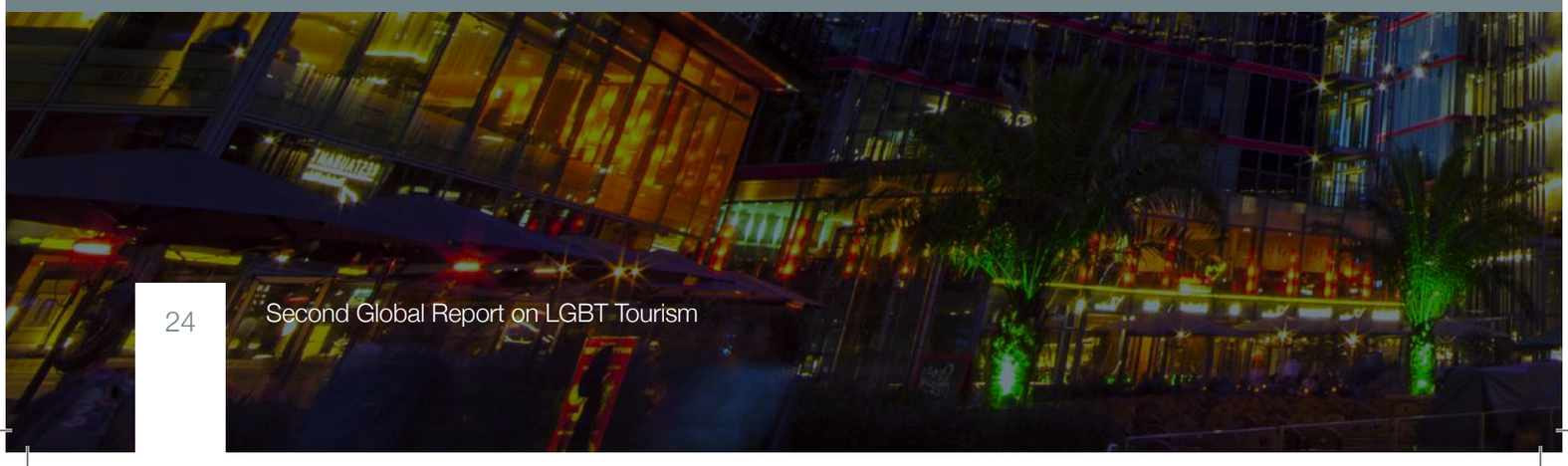
Providing the largest platform for the tourism industry worldwide, we believe in our responsibility towards society. This means we need to support initiatives that foster and advocate ecological, economic and social sustainability and human rights in tourism. This means that travellers – as well as tourism employees – should not be discriminated against because of their sexual orientation. This is part of the definition of human rights and thus part of our understanding of responsible tourism.

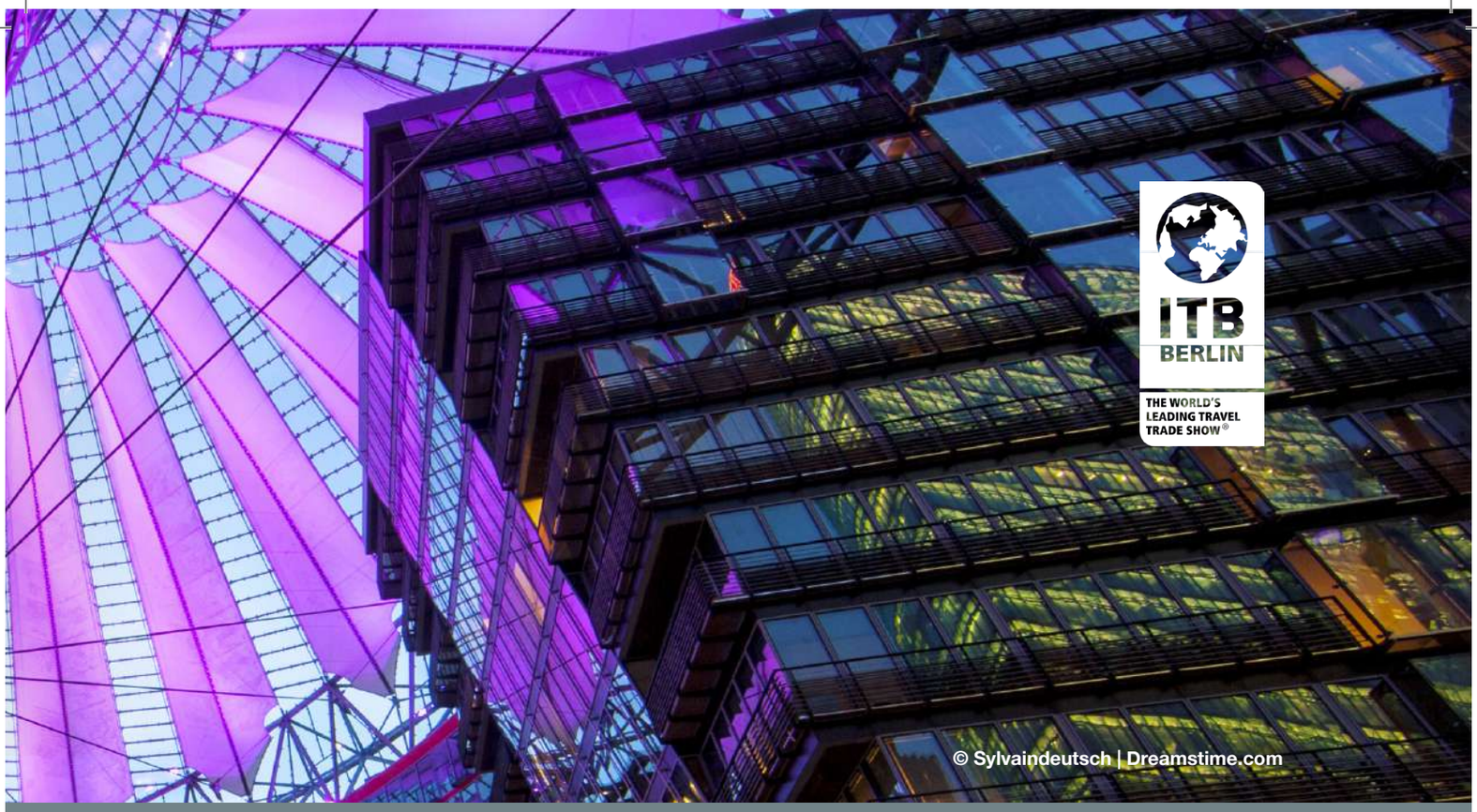
**What does this mean in practice? How do you work in different parts of the world?**

In practice, we have pulled LGBT travel out of the closet and present it just as any other segment. During ITB Berlin we organize an LGBT dedicated pavilion exhibition area, a presentation corner, several well-attended networking events, a media breakfast as well as lectures, which draw international panel guests to the ITB Convention. We also organize online and onsite seminars with up-to-date market surveys, even doing this in destinations where tourism is still developing and LGBT people are still discriminated against. Indeed, creating awareness and eliminating misconceptions is one of our most important goals.

**How do you work with IGLTA?**

We work very closely with IGLTA as we share a common goal in providing information and resources for LGBT travellers and expanding LGBT tourism globally by demonstrating its significant social and economic impact. I am proud to serve on the Board Of Directors of this important association as well as on the Board of the IGLTA Foundation as it seeks to ensure safety, dignity, and respect for LGBT travellers and tourism professionals. We also have a strong network of partners, first of all our LGBT adviser, TomOnTour/Diversity






© Sylvaindeutsch | Dreamstime.com

UG, as well as the San Francisco-based research company CMI and strategic partners such as the CVBs of Argentina, Vienna and Florida.

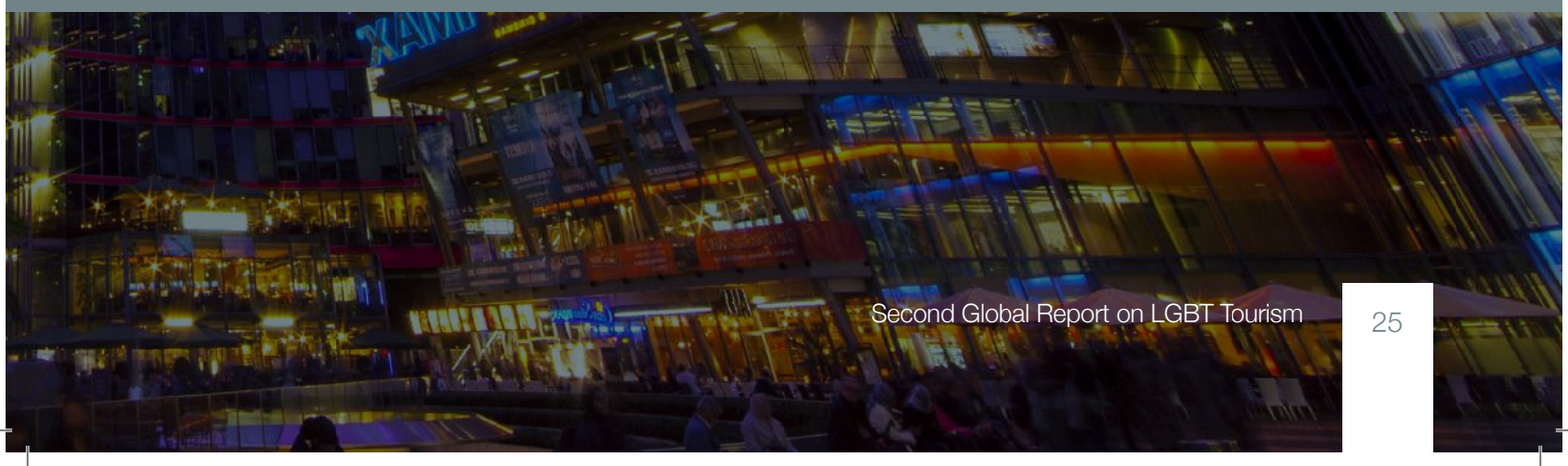
**What do you hope to achieve for LGBT travel within ITB's responsible tourism program?**

I always try to follow a holistic approach because responsible tourism is very complex! Since responsible tourism covers such broad areas of policy, I believe that you cannot just interpret it in terms of social issues or ecological issues only. Instead, I think it is time to link LGBT travel with environmentally and socially conscious travel. I want to raise awareness within the LGBT community, which, once marginalized, might have a more open ear to our call for a more responsible approach to travel. Indeed, sustainable travel principles have to become mainstream if we want to do our bit towards saving the planet. We do this because my colleagues and I at ITB strongly believe that the tourism industry can be a vehicle to help create acceptance and build bridges.

**About ITB Berlin:**

The world's largest travel trade show turned 50 in 2016. Everything started in 1966 with only nine exhibitors. Today it is the leading global event of the tourism industry with 180 participating countries, approximately 10,000 exhibitors and 160,000 visitors. The ITB Berlin Convention, which happens in parallel to the five-day show has become one of the most important information and networking platforms for tourism professionals, welcoming each year increasing numbers of visitors.

ITB Berlin uses its key position on the market to promote dialogue and networking all along the tourism supply chain and among many different actors – tourism companies, research institutes and non-profit organizations. The fair supports social engagement, accessibility, gender equality, human rights, social justice and the fight against the sexual exploitation of children as well as climate, environmental and animal protection.



# Case study 2:

## Virgin Holidays: Raising Awareness of Opportunities in the LGBT Market and Encouraging Tolerance in Destinations

By Rachel McCaffery, Sustainable Tourism Consultant, Virgin Holidays

One in three LGBT travellers (32%) feels they are treated differently due to their sexuality when on holiday. This was a key finding of research conducted in September 2016 by British-owned tour operator Virgin Holidays. The study – a survey of 1,000 adults who identified at LGBT conducted by OnePoll – also highlighted the fact that sexuality had a major influence on where LGBT British adults travelled, with two thirds (63%) refusing to visit somewhere with an unwelcoming attitude towards the LGBT community. It is clearly important for people to be able to feel comfortable when they travel, yet apparently almost a quarter (23%) of LGBT travellers change the way they act and try to camouflage their sexuality when on holiday.

For a people-focused brand with a highly developed social conscience, these findings were concerning for Virgin Holidays, particularly given that the study also reported that an overwhelming 80% said that the travel industry doesn't do enough to inform the LGBT community about local laws prior to departure. Virgin Group founder Sir Richard Branson is passionate about ensuring people are treated fairly; "At Virgin Holidays, we believe everyone, regardless of their sexual orientation or gender identity, has the right to be whoever they are, wherever they are. That's why it is shocking that in today's society some of us can't even enjoy a simple holiday without fear of discrimination." [13]

A long term supporter of LGBT rights through involvement in events like Pride and sponsorship of The Attitude Awards – Europe's largest LGBT awards ceremony – Virgin Holidays along with the wider Virgin Group of companies is taking a lead in driving change to address these issues. It has recognized a clear need to provide customers with the information needed to make informed holiday choices, together with a necessity to work with destinations to address the issues faced by the LGBT community when travelling. Under the banner "Everyone Can Take on The World" the company began rolling out a new three-year plan, which focuses on empowering staff, informing customers, and influencing partners to improve inclusivity. Led by Virgin Group Champion on LGBT global rights, Mark Anderson, the goals within the specific LGBT work stream include liaison with key partners to build a Virgin-wide LGBT network, which will involve the construction of a shared platform and the creation of a calendar of regional events, with proactive participation from all United Kingdom-based Virgin companies

Having the former Managing Director of Virgin Holidays (now Executive Vice President, Customer, for sister company Virgin Atlantic), who is out, proud and very successful as principal champion of this initiative, is the start of a deliberate policy to identify and leverage senior role models across the Virgin Group. In addition, the Human Resources teams will be

developing and sharing a set of common tools to ensure their policies and ways of working are inclusive for people of all sexual orientations and gender identities

Marketing and PR staff will raise awareness of Virgin Holidays' commitment to celebrating and working with our LGBT community through events such as the Attitude Awards and the Stonewall Diversity Champions Index.

Supporting and working with expert partners will be key to delivering on these goals. As an example, Virgin Holidays has recently joined forces with the leading LGBT rights campaign group in the United Kingdom, Stonewall, as a Diversity Champion. As part of this initiative, Stonewall is working with the company to audit its workplace on LGBT inclusion, while providing advice and support on how to strengthen policies and procedures to make it a better place to work for all lesbian, gay, bisexual and transgender members of staff. Providing staff with training on elements of identity, to enable them to recognize and understand the individual needs of each customer is another important element of the programme. This training will include an awareness of some of the nuances of different travel destinations and by combining this knowledge with questions around the type of holiday the customer wants to enjoy, Virgin Holidays staff are well placed to be able to tailor the holiday offering to the needs of individual customers.

While there is much to do in the United Kingdom, given the nature of the products Virgin Holidays sells, it would be remiss not to include a focus on influencing partners in its three-year plan. Although things are moving in the right direction, upholding of human rights and tolerance around LGBT continues to be a challenge in holiday destinations around the world. Virgin Holidays has been working with other companies in the Virgin Group, developing relationships with relevant government organizations and international agencies to best understand the mechanisms and channels through which to exert positive influence. As part of this commitment the company will be staging a roundtable on equality and tourism in conjunction with international partners, to help encourage tourism actors to recognize the opportunity that this market presents and adopt more inclusive policies.

As Mark Anderson acknowledges, "we're on a journey but our company has a role to play as a force for good." He adds "We want everyone to feel comfortable when travelling abroad and encourage everyone, regardless of their sexuality, to take on the world. We will continue to address this complex issue, and will be a proactive force for change in the LGBT community."

# 2.2 The United Nations and LGBT rights

*"Some say that sexual orientation and gender identity are sensitive issues. I understand. Like many of my generation, I did not grow up talking about these issues. But I learned to speak out because lives are at stake, and because it is our duty under the United Nations Charter and the Universal Declaration of Human Rights to protect the rights of everyone, everywhere."*

Former UN Secretary-General Ban Ki-moon to the Human Rights Council, 7 March 2012

The United Nations has been raising concerns about the human rights abuses of people who are lesbian, gay, bisexual or transgender since the 1990s. However in recent years, in light of heightened support from increasing numbers of Member States, and with the backing of former Secretary-General Ban Ki-moon (2008–2016) the Organization has engaged on a path of sustained progress toward LGBT equality and rights in the UN system.

During this time, initiatives such as those highlighting human rights abuses of LGBT people, condemning attacks against them, recognizing that they should be protected from abuse by law or and even measures to grant equal rights for UN personnel have faced opposition from culturally conservative countries. Nevertheless, thanks to growing support from a broader range of countries progress has been made in all of these areas.

## 2.2.1 Recent developments

**UN Free & Equal (www.unfe.org)**

Established in 2012, UN Free & Equal is an unprecedented United Nations global public education campaign for lesbian, gay, bisexual and transgender (LGBT) equality. A project of the United Nations Human Rights Office, UN Free & Equal raises awareness of homophobic and transphobic violence and discrimination, and promotes greater respect for the rights of LGBT people everywhere. The campaign engages millions of people around the world in conversations to help promote the fair treatment of LGBT people and generate support for measures to protect their rights.[14]

**Equal rights for UN personnel at United Nations Headquarters**

In 2014 former Secretary-General Ban Ki Moon issued a directive to extend partner benefits to all United Nations staff in same sex unions, regardless of nationality. Previously, only personnel from countries where same-sex unions were legally recognized were entitled to these benefits.

**UN Security Council special meeting on violence against LGBT people**

On 24 August 2015 Members of the UN Security Council heard testimony from witnesses of violence against LGBT people at a special session called to focus on this particular issue, a landmark event in the history of the United Nations.

**UN Human Rights Council creates position for Independent Investigator for the protection of LGBT people**

In June 2016 the 47-member UN Human Rights Council, based in Geneva, created the position and in September appointed Vitit Muntarbhorn of Thailand, who has a three-year mandate to investigate abuses against lesbian, gay, bisexual, transgender and intersex (LGBT) people.[15] The new independent expert's mandate also includes, among other things, making recommendations to member states and UN bodies on how they can improve and expand LGBT rights, providing technical assistance to countries to help design and implement policies to protect LGBT rights, and general awareness raising about specific threats to the LGBT communities worldwide.[16] Despite opposition to the creation of the role, as well as threats of non-cooperation with the Investigator, this has been recognized as a major step forward for the UN. Speaking at the World Conference of the International Lesbian, Gay, Bisexual, Trans and Intersex Association, Mr. Muntarbhorn outlined five key steps to stopping the violence and discrimination affecting not only LGBT communities but also the human rights defenders working with them[17]:

1. Lifting criminal laws which affect LGBT people;

2. Not seeing the community as suffering from a disorder;

3. Giving all people the right to have their gender identity recognized on official documents;

4. Working with different cultures and religions to ensure inclusive practices; and

5. Ensuring children grow up with the ability to empathize with people of different sexual orientation and gender identity.

**UN Secretary-General addresses '#Path2Equality' LGBT Core Group event at UN Headquarters**

On 21 September 2016, former UN Secretary-General Ban Ki-moon addressed a high-level side event of the LGBT Core Group, urging the international community to continue working for equal rights and fair treatment for lesbian, gay, bisexual and transgender people and reiterating the UN's commitment to securing their human rights. "I will always fight for the equality of the LGBT members of our human family," the UN chief said at the meeting. "This work will not leave me when I leave office – and it must not leave the office of the Secretary-General after I depart," he said.[18] Speaking at the same meeting, Chilean president Michelle Bachelet said "when we talk about protecting the rights of LGBT communities, we are in fact speaking of building a more harmonious, peaceful, caring and inclusive world where everyone can be part of a community that is enriched by divergence and diversity".[19]

**UNWTO reacts to the Orlando attack, United States of America**

On 12 June 2016 a gunman opened fire in a terrorist gun attack/hate crime at a nightclub popular with the LGBT community in Orlando, United States of America. 49 people were killed and 53 injured, causing widespread shock, not

just in the local community but around the world[20]. Following this tragic event, UNWTO released a statement expressing its "heartfelt condolences to the families and friends of the victims, to the American people and the LGBT community worldwide". UNWTO Secretary-General Dr. Taleb Rifai stated "this hideous crime reminds us once again we are facing a global threat and that we need to more than ever stay together, strengthen our cooperation and continue to fight prejudice".[21]

Further reading:

The Office of the United Nations High Commissioner for Human Rights (OHCHR), main page on LGBT:

www.ohchr.org/EN/Issues/Discrimination/Pages/LGBT.aspx

UN Free & Equal – www.unfe.org

# 2.3 The case for LGBT inclusion and diversity in destinations

Travel and tourism marketing has made a significant digital shift, and as a result of this process destinations have increasingly found themselves competing in a global marketplace. As travellers share and review their experiences in real-time to a global audience, potential visitors are able to make a much sharper comparison between the marketing promise and the actual in-destination experience.

With this in mind, it matters how safe, respected and welcome travellers feel, and how comfortable they feel with being who they are. It may not be immediately obvious to those who are not lesbian, gay, bisexual or transgender why this feeling is so important to those who are LGBT. Surely everyone wants to feel welcome, safe and respected while travelling? While this is certainly true, it is important to consider that the experience of growing up for many LGBT people can involve feelings of shame as they discover that they have a different sexual orientation or gender identity from their peers. This can continue later in life, as, fearful of negative reactions possibly leading to violence or abuse from those around them, LGBT people may *hide* this integral aspect of their personality. For this reason, those places or businesses which celebrate diversity and make an extra effort to demonstrate that *all are welcome* are frequently rewarded with the loyalty of LGBT customers.

## 2.3.1 Support for LGBT inclusion and diversity makes economic sense

It has long been understood among businesses marketing to LGBT customers that their public support for LGBT causes and relevant marketing campaigns is frequently reciprocated with the loyalty of this customer segment. However, the reasons why business often leads the way in reaching out to LGBT people and supporting their rights as individuals goes beyond sales targets. This approach has interesting implications for tourism destinations too. This section discusses the link between LGBT inclusion, corporate practice and economic prosperity in destinations.

In a globalised world, consumers have become more aware than at any time in the past of the impact of business on society, the environment and the economy at large. A 2016

study of nearly 8,000 millennials from 29 countries published by Deloitte[22] found that young people from this generation prefer to be part of a business that behaves responsibly towards society, with almost nine in ten (87%) stating that "the success of a business should be measured in terms of more than just its financial performance. Meanwhile 62% of respondents said that business performance could be judged by how it treats its employees."[23]

In fact, in an age where people receive a greater share of news, opinion and advice through social media about which products and services they should buy, all areas of corporate practice are under potential scrutiny by existing and potential customers, employees and shareholders. In the same way, as corporations spread their operations they need to be sure that they apply the same standards of care and responsibility towards their customers and employees across the world. This is good practice in corporate and social responsibility but also will help companies operating in anti-LGBT environments to avoid having to take positions inconsistent with the values of the commercially critical global middle class.[24]

*"The business world's concern for the rights of LGBT people is part of an overarching aspiration: that everybody is able to fully participate in business life – and in society more broadly – regardless of personal attributes such as gender, race, sexual orientation or gender identity. This is not new, and it is not mere aspiration: many businesses have a proud history of making this a reality. In particular, global businesses have learnt that it is no longer sufficient to guarantee non-discrimination in the workplace: many consumers now also expect businesses to speak up and advocate for LGBT rights around the world."*[25]

*Miller, J. and Parker, L. (2015)*

However, when it comes to promoting LGBT inclusion and diversity, businesses may find that in some countries where they operate, implementing corporate policies that recognize and support the rights of their LGBT customers and employees may contravene local laws and customs which are hostile to LGBT rights. Testimony from many of the participants of Open for Business (see below) indicates that where companies have faced the dilemma of contravening local customs versus upholding their principles of inclusion

and diversity they have opted for the latter. In such environments, many corporations have aimed to provide a safe space for their LGBT employees, as well as holding seminars and staff training programmes in order to promote understanding and acceptance among the wider team.

As part the research for this report, an online survey of major hotel business members of IGLTA was carried out to better understand their approach to corporate inclusion and diversity in locations where this may run counter to local customs. The response given by Paris-based AccorHotels is particularly worthy of note:

> *"As part of our Diversity Commitment, we create conditions conducive to our employees' wellbeing and are determined to ensure these commitments are complied with in all countries in which we operate, taking account of each country's history and heritage. Our commitment is not only to our existing employees, but also to equal opportunity in recruitment. Additionally, to help improve the community, we require those with whom we conduct business (such as suppliers, sub-contractors, service providers) to sign the Group Procurement Charter and comply with the social principles set out in it, complying with the legislation in force and international standards. Non-discrimination is the first of these principles.*
>
> *"Furthermore, our Diversity Commitment applies to all locations where we conduct business. We urge our managers who are responsible for implementing our policy on the ground to set up special discussion forums, such as 'open tables' involving their teams. We also make sure that our standards and commitment to diversity are well known in all regions, and our hotels and global offices are viewed as 'safe' places to work, regardless of location. With regard to customers, all guests are treated with the utmost dignity and respect. As part of our Diversity Commitment, all employees go through an induction, which includes diversity training that incorporates sensitivity to LGBT travellers, as well as all other diverse populations. In some locations we have asked independent specialists to 'train the trainers' on specificities to the LGBT population. We are currently working on the launch of an LGBT specific module in our*

*diversity training which will include information from an outside source to enhance our already existing training and education program for employees."*

Steven Eidelberg,
Senior Director of Sales, Travel Agency and Leisure,
AccorHotels Global Sales Office NCAC

As a further example, in March 2017 Axel Hotels, a hetero-friendly Barcelona-based hotel group was among more than 20 Spanish businesses recognized by the non-governmental organization *Trabajando en Positivo* for its pioneering work in facilitating employment for those who are HIV positive, a segment of the population which can often face discrimination in the workplace due to stigma related to the condition.

The next section presents the findings of a major report that puts forward the business rationale on global LGBT inclusion. It explains how successful, enterprising businesses thrive in diverse, inclusive societies and the spread of anti-gay policies runs counter to the interests of business and economic development.

## 2.3.2 Open for business

In 2015 a number of leading global companies formed a coalition called "Open for Business" to make the case that inclusive, diverse societies are better for business. Members of Open for Business include American Express, Accenture, AT&T, Barclays, Burberry, Ernst & Young LLP, Google, IBM, Inditex, LinkedIn, MasterCard, Microsoft, PwC, Standard Chartered, Tesco and the Virgin Group, with more corporations joining each year. In 2015 the Brunswick Group published a report on behalf of Open for Business, which presented comprehensive evidence for LGBT inclusion and diversity taken from a broad base of research.[26]

The business and economic case for LGBT inclusion exists on three levels – economic performance, business performance and individual performance – and the evidence base is presented in the following 23 propositions:[27]

| Economic performance | Business performance | Individual performance |
|---|---|---|
| **Proposition 1: Urban economic growth** | **Proposition 10: Attracting talent** | **Proposition 16: Authenticity** |
| Cities are a major driver of global economic growth and for governments around the world; the competitiveness of these cities is a strategic priority. Urban economic growth depends upon human capital: the right mix of people whose economic role is to create new ideas and technologies. This "Creative Class" is attracted to cities that are open and tolerant, and the presence of a vibrant LGBT community is a strong signal that this is the case. | Many global companies have found that creating LGBT inclusive workplaces can play a role in attracting the best talent: it sends a strong signal that the company is progressive and meritocratic. Consequently, LGBT inclusion is promoted in recruitment campaigns by companies in a range of sectors. | Individuals working in open, diverse, inclusive environments are able to be themselves, instead of concealing important aspects of their identity. After all, being comfortable to be yourself, and knowing that you are in a workplace that encourages you to be yourself, is key to employee engagement. |
| **Proposition 2: Entrepreneurship** | **Proposition 11: Retaining talent** | **Proposition 17: Motivation** |
| LGBT inclusion results in higher levels of enterprise, creativity and innovation. Furthermore, diversity stimulates entrepreneurship since a heterogeneous population with different lifestyles and consumption patterns increases the variety of goods and services demanded, which has been found to stimulate competition and drive innovation of new forms of production and consumption. | Employee retention is a priority in business: unnecessary turnover forces companies to spend a significant amount of money recruiting and training new employees. LGBT discrimination results in higher turnover rates, because employees may be forced out as a result of their sexual orientation or gender identity, or they may feel compelled to leave. | It has long been established that people are more motivated if they work in an environment in which they are valued for who they are and what they contribute, regardless of attributes such as sexual orientation or gender identity. |
| **Proposition 3: Corruption** | **Proposition 12: Innovation** | **Proposition 18: Affinity** |
| To do business effectively on a global basis, companies need clearly regulated, stable environments. For all businesses – large and small, local and global – good strategy depends upon reliable information and a level playing field. The Open for Business study found a correlation between levels of corruption (which acts as a brake on national development) and measures of attitudes towards LGBT people. While it does not imply any direct causal link between corruption and LGBT inclusion, the study's findings do strengthen the proposition that LGBT discrimination often goes hand-in-hand with corrupt practices and a lack of openness. | Innovation is critical to securing and maintaining competitive advantage: it creates new markets and revenues, and it underpins productivity and profitability. Studies show that greater diversity appears to improve the productivity of research and development teams within a business. | Evidence suggests that open and inclusive environments allow a greater number of people to feel affinity with their company, and thus contribute to overall improved performance. Individuals working in open, diverse, inclusive environments have greater affinity with values and culture of the workplace. |
| **Proposition 4: Foreign direct investment (FDI)** | **Proposition 13: Collaboration** | **Proposition 19: Satisfaction** |
| Evidence shows that emerging markets that are less open and inclusive attract less FDI. Tolerance and inclusion help attract FDI since quality of life factors, such as tolerance and inclusion help attract the international workforce and investment required for highly skilled industries. | Companies that are more diverse and inclusive create an atmosphere of trust and communication, which is essential to effective teamwork. | Many studies show that employee satisfaction is positively correlated to business-level outcomes such as productivity, profit and employee retention, and the evidence base clearly suggests that open and inclusive environments are likely to foster higher levels of satisfaction. |
| **Proposition 5: Global markets** | **Proposition 14: Customer orientation** | **Proposition 20: Health** |
| The economic actors of the global marketplace tend to be those who implement global standards of best practice with regard to diversity and inclusion – and they expect the same of those they do business with. Therefore, companies in countries that foster a culture of diversity and inclusion may find it easier to engage with global markets. | Companies that are more diverse and inclusive are better able to anticipate customer needs and to access a broader client base in a wider number of markets. As Tony Tenicela, Global Leader for Workforce Diversity and LGBT Markets at IBM states, "diversity is no longer about race, gender, sexual orientation or disability – or numbers. It is about broadening the definition and objectives to ensure we create a globally sensitive corporate culture".[28] | The evidence base shows that open and inclusive environments are also healthier environments, and that employees free of workplace discrimination enjoy better physical and mental health – they are more resilient and have greater stamina. |

| Economic performance | Business performance | Individual performance |
|---|---|---|
| **Proposition 6: Brain-drain** | **Proposition 15: Brand strength** | **Proposition 21: Speaking up** |
| LGBT discrimination results in a "brain drain" – the emigration of talented and skilled individuals. There is much anecdotal evidence of people leaving for safer and more comfortable places because of harsh LGBT laws and taking their skills with them. | Today's globally aware consumers are increasingly attuned to the values of the companies they buy from. This is true for a broad base of consumers, not just LGBT individuals. Companies that are more diverse and inclusive have greater brand appeal and loyalty with consumers who want socially responsible brands. | Companies that embrace inclusion and diversity are more effective at fostering a communicative culture. This in turn creates an environment where workers are free to speak up when they see a problem, and contribute to problem solving, a key component of the company's overall performance. |
| **Proposition 7: Health** | | **Proposition 22: The extra mile** |
| A healthy population is the bedrock of a healthy economy: individuals that are able to participate productively in the workforce contribute to economic growth. However LGBT people face poorer health outcomes than the general population in countries that do not support LGBT inclusion partly because LGBT people face discrimination in accessing healthcare. | | Employees who feel valued in the workplace are more likely to contribute beyond their formal remit – thereby enriching the company culture and boosting productivity. These behaviours may include altruism, courtesy, conscientiousness, civic virtue, sportsmanship, peacekeeping, cheerleading, helping, and loyalty, among others. |
| **Proposition 8: National reputation** | | **Proposition 23: Individual productivity** |
| The international reputation of a country has become a significant factor in the global competitiveness of its economy. A strong international reputation underpins trade-building activity and access to global markets. So-called *country brands* have become an important focus of diplomatic activity for many nations, helping to cultivate a positive climate of opinion, and enabling the exercise of *soft power*.<br><br>The persecution of minorities such as LGBT individuals may damage the reputation of a country on the world stage. This places value at risk for countries which may have significant tourism sectors, or which rely upon the export of goods to overseas consumer markets. It may also undermine the ability of domestic businesses to attract skilled employees from overseas and secure foreign investment. | | Individuals working in open, diverse, inclusive environments have greater productivity – more efficient work with higher-quality outputs. |
| **Proposition 9: National productivity** | | |
| If productivity is a key objective for policy-makers, then there is a cost to any policy which reduces the productivity of a segment of the population, which will run counter to this objective. Evidence suggests that anti-LGBT policies reduce the productivity of LGBT individuals, while open and inclusive policies are likely to increase productivity for everyone. | | |

**Source:**
Miller, J. & Parker, L. (2015) 'Open For Business, The economic and business case for global LGBT inclusion', Brunswick Group, pp.28-55, available at www.open-for-business.org"www.open-for-business.org

**© Krisztian Miklosy | Dreamstime.com**

### 2.3.3 Implications for destinations

The results of the *Open for Business* report, as well as evidence collected from IGLTA and UNWTO members in online surveys for this report demonstrate that businesses of all sizes can do much to boost their own performance and attractiveness to customers, employees and shareholders by promoting a culture of LGBT inclusion and diversity. Many businesses in the tourism sector (including many long-standing members of IGLTA) have been pioneers of LGBT inclusion and diversity in the workplace; however there are important lessons for businesses in the wider tourism sector in applying and reapplying the principles set out in the report.

Significantly, there are many parallels to be drawn between the performance of businesses that promote LGBT inclusion and diversity, and the performance of tourism destinations. Of course, destinations around the world – even destinations within a country – are heterogeneous. There are many more political, social and economic factors that influence how inclusive and diverse a destination is, however there is one principle that holds true: **destinations that make great places to live for LGBT people, make great places for them to visit.**

Destinations which are safe places to live, with lower levels of corruption, higher living standards, a creative workforce, transparent government, greater economic opportunities for all and a lively and diverse cultural scene make for attractive places to visit. Just as global businesses seek to attract the most diverse range of customers by reflecting diversity through their workforce, destinations that promote diversity and inclusion are best placed to attract the widest range of visitors.

TRAVEL.
ENJOY.
RESPECT.
#TRAVELENJOYRESPECT

# Case study 3:

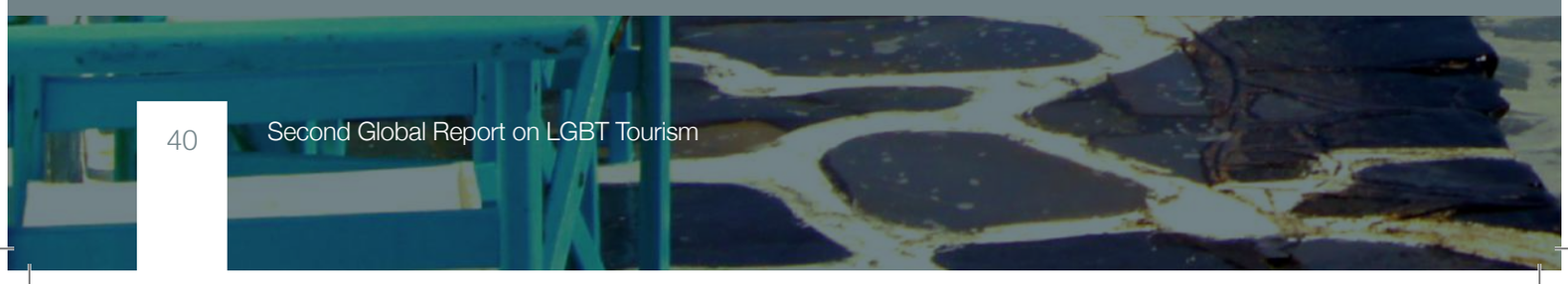
## Considering the changing vacation preferences of LGBT travellers

By Brian Tress, Executive Director, and
Jorgan von Stiening, Senior Manager,
Ernst & Young LLP

The overturning of the Defense of Marriage Act by the U.S. Supreme Court in June 2013 was among the most significant milestones in the progression of gay rights in the United States of America, but was just one in a series of swift victories that has advanced those rights over the last few decades. Within a generation, societal views of sexual orientation transitioned from being one's defining characteristic to merely one of many personal traits. Despite broadening acceptance, numerous studies have revealed that gay neighbourhoods, bars and other lesbian, gay, bisexual, transgender (LGBT) venues across the United States of America and Europe are dwindling as the societal need for safe and communal spaces for gay populations diminish. This evolution has also meant a broadening of the psychographic variables of LGBT travellers, the way they interact with each other, and more importantly, the world.

Historically, there were only a handful of gay destinations in the United States of America and Europe that were outlets for openly LGBT travellers, their families, and their friends to vacation safely. Provincetown, Massachusetts, United States of America; Fire Island, New York, United States of America; Sitges, Spain; and Mykonos, Greece, were some of the vacation towns seasonally bursting at the seams with a largely gay demand base. Though safety remains a top concern for LGBT travellers (as many areas of the world remain unsafe for the LGBT community), it is no longer a factor restricting them to a handful of destinations. Instead LGBT travellers and their families now select destinations largely the same way their straight counterparts do (i.e., weather, cultural offerings, activities, budget). In a 2015 global study conducted by Community Marketing, Inc., 68% of LGBT parents indicated that a child-friendly environment was more important than an LGBT-friendly environment when selecting a vacation destination, an increase of 10 percentage points from 2012. The same study also indicated that LGBT friendliness was among the least important factors for LGBT Generation X and millennial travellers when selecting a hotel, with factors such as location, value and price being of greater importance.

The term LGBT encompasses a broad array of demographics; the LGBT population is as diverse and fragmented as the general population. Differences are often particularly extreme between the sexes, as gay men and lesbians often share few of the same travel habits. For example, the same 2015 study conducted by Community Marketing, Inc. found that 66% of homosexual men went to a gay bar, and 60% went to a gay neighbourhood while on vacation in the past 12 months, indicating that gay-specific activities still matter to homosexual male travellers. The study also revealed that only 38% and 39% of lesbian women went to a gay bar or visited

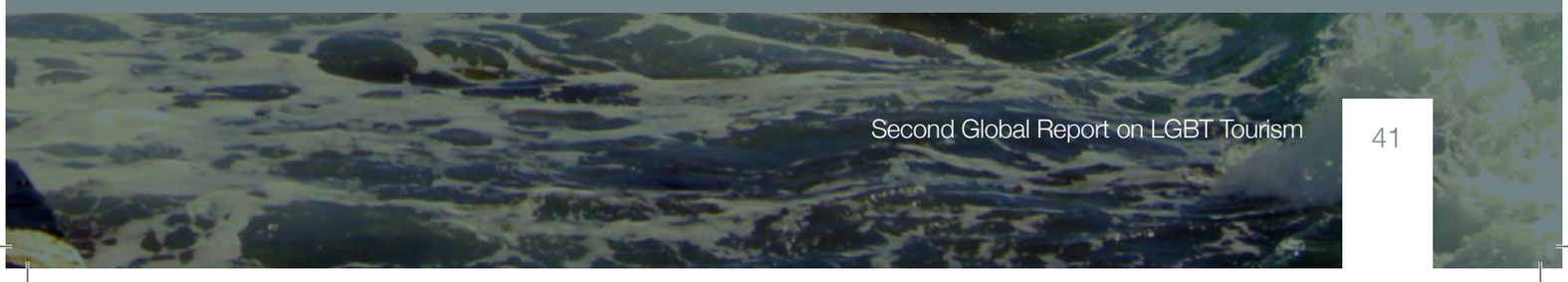


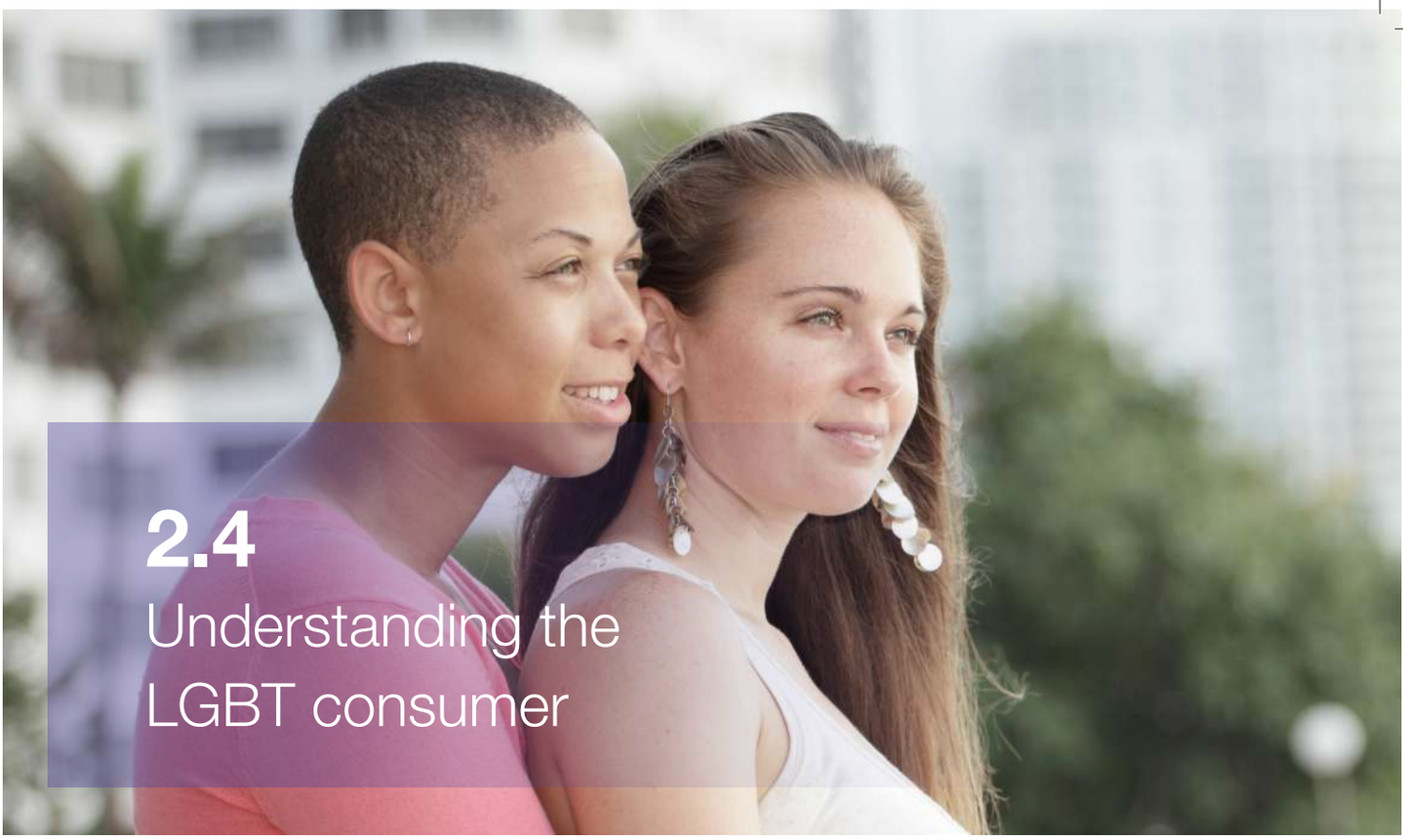
a gay neighbourhood while on vacation, respectively. Among the reasons for this may be that more gay men surveyed identified as single. As a result, lesbian women are more inclined to vacation with families, with travel preferences and budgetary constraints more closely aligned with their straight counterparts than those of gay men. Conversely, homosexual men are more likely to travel exclusively with adults, possibly as a result of having fewer children, and are likely to have more disposable time and income, allowing for greater travel flexibility.

Technology has also been a substantial disruptor to traditional means of LGBT people meeting and interacting with one another, especially while traveling. Location-based dating apps allow users to interact with a greater number of people without the need to be located in one specific place or venue. While this technology is often lambasted for driving the decline of LGBT bars in major United States of America and European cities over the past 10 years, it is popular among travellers who seek to meet locals, and share travel tips and recommendations. According to the 2015[29] study conducted by Community Marketing, Inc., 31% of gay men used dating apps to meet others over the past 12 months while on vacation (while only 4% of gay women did so), significantly higher than the average American (15% of Americans used a dating app on vacation in 2015 according to the Pew Research Center[30]). Some of these apps now offer features where users can connect with people in a city weeks or months ahead of arrival. This means that today, LGBT people no longer need to travel to destinations with concentrated numbers of gay people and venues to meet other LGBT people; they can now connect with each other in remote and non-LGBT friendly locations.

The LGBT community is evolving and navigating through societies and cultures as never before. While a shared history and on-going struggle for rights across the globe will remain a unifying force, the LGBT community will continue to diversify, and travellers will develop new and fragmented interests and preferences. As destinations around the world market themselves to LGBT travellers, understanding the travel expectations of this group will be critical to their success.

Note: This publication contains information in summary form and is therefore intended for general guidance only. It is not intended to be a substitute for detailed research or the exercise of professional judgment. Member firms of the global EY organization cannot accept responsibility for loss to any person relying on this article.





# 2.4 Understanding the LGBT consumer

As destinations seek to benefit from the economic benefits of tourism and compete in a global marketplace, those responsible for destination product development and marketing seek to understand and attract visitors who are prepared to spend more in the destination and develop a sense of loyalty to ensure repeat visits.

It has long been assumed that LGBT consumers tend to have higher levels of disposable income and thus spend more than general consumers on discretionary categories such as travel, fashion or entertainment. Many assume that this is because LGBT couples choose not to have children. However these assumptions are increasingly regarded as too simplistic. As more countries change laws to allow equal rights in adoption by LGBT parents, family compositions are becoming increasingly more diverse in nature and many LGBT people are travelling as parents. Furthermore, it is certainly true that around the world, unemployment, low pay and poor job stability affect LGBT people as they do for everyone. These factors are important to bear in mind before embarking on any analysis of data on LGBT consumers.

Research on LGBT consumers carried out by specialist organizations reveals the following broad set of market characteristics:

- **The purchasing power of LGBT consumers in United States approaches USD 917 billion in 2016**: According to analysis carried out by Witeck Communications, in 2016 the combined LGBT buying power of LGBT consumers in the United States is forecasted to exceed an estimated USD 917 billion. This forecast is based on an estimate that as many as 7% of adults identify as LGBT, and on a calculation of this group's disposable income, as opposed to actual annual expenditure.[31]

- **The process of carrying out research on LGBT consumers is helped by the increasing numbers of LGBT individuals willing to self-identify**. As visibility increases and LGBT consumers become more comfortable with identifying themselves as such, the number of potential respondents to surveys and focus groups expands. When weighting data collected, most

market research organizations assume a share of between 3 to 7% of the population who are willing to identify as LGBT. At the same time, given that there are still more than 70 countries in the world where homosexuality is illegal, global data on the actual size of the LGBT community remains elusive. [32]

- **Traditional labels used to categorise LGBT individuals are becoming less relevant**. It is also essential to understand individuals' increasing unwillingness to 'pigeonhole' their sexual orientation and gender identity (SOGI) into one specific, immovable category. Research carried out among younger generations in mature outbound markets suggests that this group regards SOGI as a more fluid concept.

- **When analysing consumer attitudes, gender and generation are often more informative distinctions than those of LGBT consumers as a whole**. Depending on the circumstances, changes in social attitudes and the life experience of individual consumers often provide a heavier influence on one's attitudes than sexual orientation. In fact, in line with the point above, it is too simplistic to consider consumers in terms of SOGI alone.

- **Outreach and strategies to serve LGBT consumers must not assume that this is one homogenous group**. As a report by the financial group Prudential in 2014 pointed out: "the LGBT community is made up of groups who share common struggles yet retain distinct traits, outlooks and characteristics. For example, lesbian couples are far more likely to have children than gay men. The bisexual community is comprised of both opposite-sex and same-sex couples, while transgender people often face increased economic discrimination compared to the rest of the community. [33]

- **Bisexual consumers are harder to identify as consumer profiles but still important to recognize**. As a 2014 report by Skift observed, bisexuals are less readable in public, since they are read as either gay or straight depending upon the partner they are traveling

with, and are serviced accordingly.[34] Furthermore, results of CMI's 10th Annual LGBT Community Survey of 28,000 consumers in 118 countries showed no substantive differences between gay vs. bisexual men, or lesbian vs. bisexual women. In fact, 26% of bisexual men in the survey also indicated that they are gay men, and 27% of bisexual women in the survey also indicate that they are lesbians.[35] Both of these findings underline the importance of recognizing increasingly flexible attitudes among consumers, towards sexual orientation.

- **Increased visibility and shifting social attitudes are starting to change awareness around the needs of transgender consumers**. CMI's studies (2016) assume that transgender individuals represent around 8% of the LGBT community (gay and bisexual men representing 46%, and lesbian and bisexual women representing 46% of the community).[36] A range of factors including shifting attitudes towards gender fluidity among the young, political debate (particularly in the United States of America) and increased visibility of public figures who are transgender has helped to improve awareness about the issues that transgender people face, and how public and private organizations can react with greater sensitivity, better products and marketing. The case study in this report from the Greater Fort Lauderdale CVB explains how destinations can better engage with transgender travellers.

- **Over 35 million international tourist arrivals by LGBT consumers**. By applying a more conservative 3% LGBT population estimate to the 2016 international tourist arrival figures from the UNWTO (1.235 million),[37] this means that approximately 36 million overnight visitors who travelled to international destinations around the world last year were part of the LGBT community.[38]

- **LGBT-specific causes generate interest and galvanise support among LGBT consumers and their allies**. Issues such as discrimination, religious opposition to LGBT equality, transgender rights, workplace equality and racial

discrimination within the LGBT community. Research by CMI (2016) found that millennial-aged consumers are particularly concerned about these issues.[39] Furthermore, allies (individuals who are not LGBT but who support LGBT people in addressing these issues), should also be considered as an essential group to engage with in light of their solidarity with LGBT specific causes and the brands that choose to champion them.

### 2.4.1 LGBT chambers of commerce

Around the world, businesses run by LGBT people, or those keen to understand, support and attract LGBT consumers have formed LGBT Chambers of Commerce. Notable examples around the world include the Miami-Dade Gay & Lesbian Chamber of Commerce, la Cámara de Comercio Gay y Lésbico de Argentina and the Cámara de Comerciantes LGBT de Colombia. The US National Gay and Lesbian Chamber of Commerce (NGLCC) is particularly active across a wide variety of areas (advocacy, representation, research). Such bodies can provide an effective way to:

- Exchange information on LGBT consumers from the local area and further afield;
- Demonstrate member's willingness to reach out to LGBT consumers;
- Pool resources to carry out marketing efforts;
- Campaign for equal rights for LGBT people;
- Train local business staff;
- Run LGBT-related events; and
- Support LGBT business networks overseas.

# Case study 4:

## A *community* of practice: A theoretical take on LGBT travel behaviour

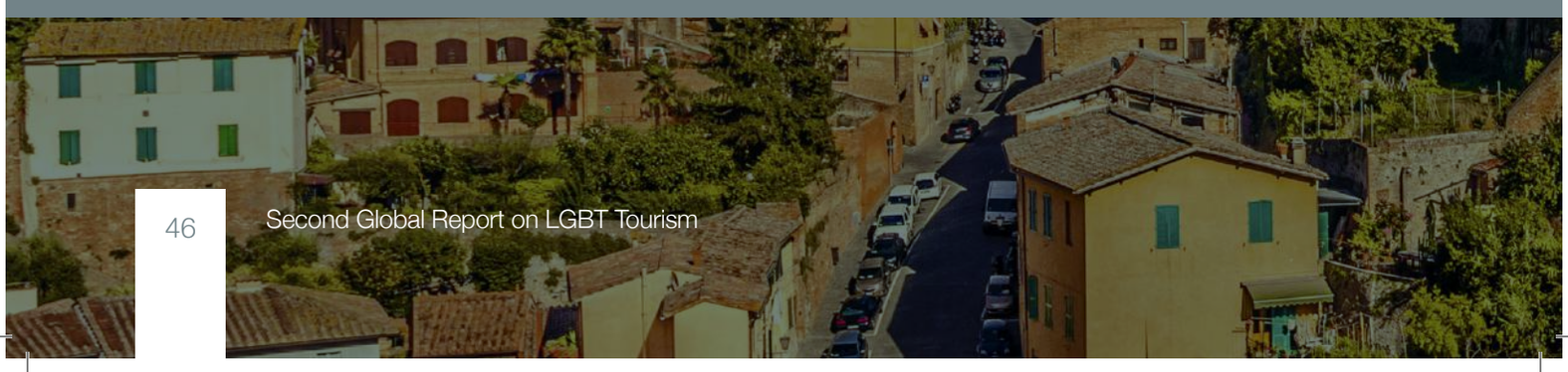
By PhD Maria del Pilar Leal Londoño
Director, Bachelor programme in Tourism and Leisure
Ostelea School of Tourism and Hospitality, GRIT Ostelea-EAE Research Group

Gay and lesbian travel is one of the fastest-growing markets in the international travel industry. The importance of this segment is well known by the tourism industry; however the understanding of their behaviour as a tourist has not yet been so broadly discussed. It is important to understand the preferences of LGBT people when they are traveling and visiting a destination. In fact, we usually talk about the "community" when we refer to the LGBT segment because these are people who share identity and have many things in common, not to mention high levels of inter-community interaction. The purpose of this contribution is to discuss the LGBT community as a *community of practice* and help the tourism industry to understand in a broad sense, the behaviour of LGBT tourists in a globalized context.

A *community of practice* can be defined as a loosely organized group of people who engage in processes of collective learning in a shared domain of human endeavour.[40] Communities of practice are characterized by a "mutual engagement" that binds members together, and a "shared repertoire" of tools, language, and stories.[41] The interaction and participation in a community of practice provides a rich context for learning characterized by acquisition of knowledge and skills that may be transferred across contexts.[42] Given the fact that knowledge advantages provide opportunities for entrepreneurial initiatives, communities of practice should be seen as important sources for innovation processes.[43]

Nowadays, it is well known that LGBT segment acts as a community not only because they are united by the sense of identity, but also because they share experiences, knowledge and communication. The exchange of their experiences and knowledge about travel and tourism has big impacts in the community worldwide since they make use of common platforms and communication channels that have been created by the same community. It is well known that LGBT tourists make an effective use of communication channels, whether those channels are online (Facebook, specialized apps, specialized websites among others), or offline (magazines, newspapers, brochures, etc.) and reveal innovative paths of knowledge creation and a self-segmentation that are reflected in destinations.

Taking two main destinations as case studies such as Berlin and Barcelona in Europe, and by observing the spatial distribution of tourism and leisure activities in these cities,

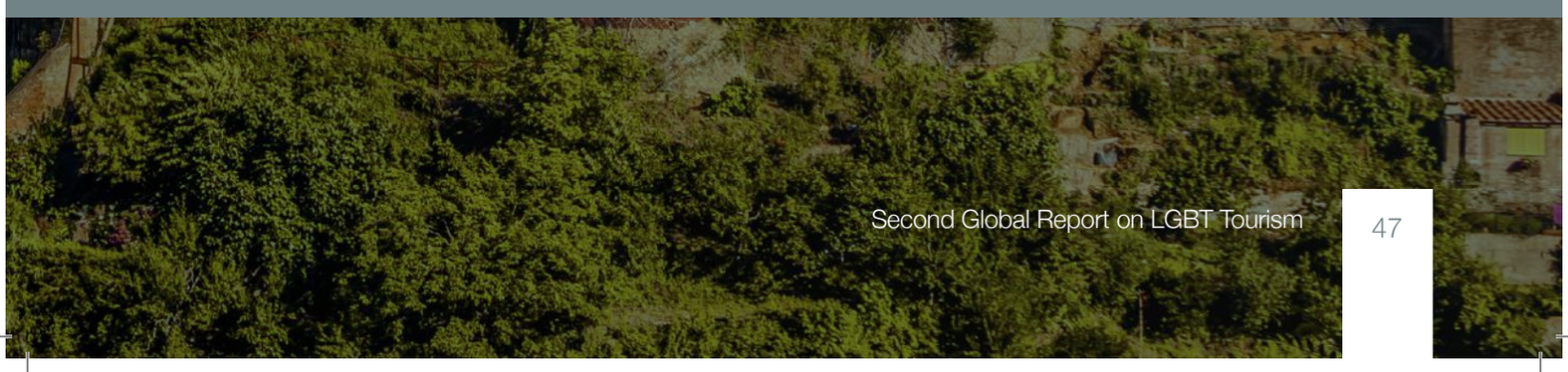


it may be argued that for tourism destination managers and enterprises that are interested in LGBT tourism worldwide, it is necessary to understand those patterns and tracks created by LGBT communities in well-known gay friendly destinations. Following the conceptual framework of community of practices as a driver of learning and knowledge generation across a variety of work,[44] the terms and concepts linked to a community of practices and applied to the LGBT community are useful in order to understand new patterns of tourism behaviour.

When we analysed LGBT community geographical behaviour in urban destinations such as Barcelona and Berlin, we could identify two main neighbourhoods as hubs of knowledge and experiences for improving tourism. In the case of Barcelona, we find Eixample (known locally as 'Gaixample') and in the case of Berlin the neighbourhood of Schöneberg. For instance, since the eighties the Eixample has been very representative for the LGBT community in Barcelona, there we can find more than 27 establishments including libraries, travel agencies and hotels adding to the colour of this vibrant neighbourhood. Meanwhile, in the case of Schöneberg, Berlin's gay quarter has been a kind of hotspot for the LGBT community since the twenties. Schöneberg also is a district full of cafes, bars, pubs, libraries, restaurants, saunas and shops dedicated to the LGBT segment. For LGBT people if they visit Barcelona or Berlin, a visit has become a must.

Destinations and businesses must be aware of a need of specialized information but above all, must be aware of knowledge exchange and virtual interaction of the LGBT community since they may be defined as a learning network.

Finally, and given the nature of the LGBT community, and based on the analysis of Eixample and Schöneberg as main tourist attractions, it is clear that LGBT tourists are sharing a set of values based on identity that allow them to exchange knowledge and interaction resulting in an improvement of the tourist experience. This improvement is representative of a community of practice because communities are not limited by formal structures: they create connections among people across organizational and geographic boundaries.[45] These connections may be taken into account by tourism enterprises and destinations as a way of improving LGBT tourism experiences.



# Chapter 3:
## The impact of same-sex marriage on the tourism sector

## 3.1
## Equal marriage – an overview

The introduction of registered partnerships – or fully equal marriage – for same-sex couples has become one of the clearest signs of a shift in social attitudes towards the acceptance of LGBT people and their entitlement to equal rights. In many respects the presence of equal marriage legislation in a country has become shorthand for that country's acceptance of ethnic and sexual minority groups as a whole. This is important for destination marketing because, while the connection between progressive national laws and the reality of daily life for LGBT people can sometimes be quite distant, it is encouraging that equal marriage has generally become a *badge of honour* in enhancing a country's (and by extension its destination brand) image.

Furthermore, when discussing equal marriage, it is important to consider that this is a relatively new phenomenon which has occurred almost exclusively in developed countries, and one which remains a distant dream for LGBT people in those countries which discriminate severely on grounds of sexual orientation and gender identity.

Nevertheless, almost every year since 2000 has been marked by countries in Europe, North and South America changing laws to ensure rights in marriage for same-sex couples. For the global wedding industry (estimated to be worth over USD 300 billion worldwide, and USD 55 billion in the United States of America alone),[46] it is clear that an increase in the number of couples purchasing jewellery, venue hire, catering, photography, flowers, entertainment, clothing, gifts, accommodation, honeymoons and much else has been good news.

For the global tourism sector, the increase in the number of weddings being celebrated per year has undoubtedly been positive. Couples frequently travel to get engaged, families and friends travel to attend the ceremony and hotels and

restaurants are popular spaces to hold the ceremony or reception. Honeymoons provide the perfect excuse for a big-spend *once-in-a-lifetime* trip to celebrate a new partnership. In fact, according to a 2016 report by Community Marketing Inc., 80% of couples in the United States of America declared that they expected to take a major vacation in the 12 months following their wedding ceremony.[47]

### 3.1.1 Equal marriage: bringing a discussion of LGBT issues into the open

The pace of change towards marriage equality has undoubtedly quickened in recent years, however the path towards achieving this has not been smooth in any country. Across the world, public discussions that have led up to parliamentary votes or popular referenda have seen vocal opposition from traditionalist or religious groups, and sometimes even public protests. At the same time, these public discussions have also had the effect of bringing the issue of discrimination out into the open, and have provoked LGBT allies to come forward and declare their support for LGBT rights, where no such discussion took place before. Such discussions have also highlighted the shift in attitudes towards acceptance that has occurred, particularly among younger generations. Research has shown that once legislation is passed and equal marriage is normalised, social attitudes continue to shift towards increased acceptance of LGBT rights.

### 3.1.2 The spread of same-sex marriage around the world

The world's first same-sex marriage bill was passed in the Netherlands in December 2000 and came into force in 2001. This was followed by Belgium in 2003, Spain and Canada in 2005 and South Africa in 2006. Since that time, a further 22 countries introduced nationwide laws allowing same-sex marriage. The full list is illustrated in Figure 3.1.

Furthermore, there is an equally extensive list of countries where national or regional legislation has been approved or is pending that allows an alternative form of legal recognition of same-sex couples other than marriage. This list includes Austria, Bolivia, Chile, Costa Rica, Croatia, Cyprus, Czech Republic, Ecuador, Estonia, Germany, Guatemala, Italy, Monaco, Peru, the Philippines, San Marino, Thailand and Venezuela. The issue is also being debated in Taiwan Province of China with possible approval in the coming months.

### 3.1.3 The economic impact of equal marriage in destinations

Typically, in countries where equal marriage has been introduced, in the period immediately following legalisation, a surge occurs in the number of ceremonies held as couples who have waited many years are finally able to 'tie the knot'. Later the rate of same-sex ceremonies held tends to fall back in line with the general population.

Prior to the nationwide legalisation of same-sex marriage in the United States of America, an estimate of the economic impact of same-sex marriage in the state of California calculated that around 50,000 couples in the state would eventually spend nearly USD 400 million over the first three years of legalization, yielding USD 31 million in local tax revenue.[48]

Prior to the introduction of same-sex marriage from registered civil partnerships in 2012, a forecast by the Government of the United Kingdom predicted that an additional 3,025 ceremonies per year (based on an annual rate of over 6,000 same-sex unions per year over four years) would result in approximately GBP 14.4 million extra spending in the economy. This would benefit premises which host marriages/civil partnerships and producers and retailers of products and services used in ceremonies (the figure would also include money spent on hotels, presents bought by guests etc.).[49]

In 2012, one year after the passage of New York State's Marriage Equality Act, NYC & Company and the city of New York released the first statistically reliable study *The Economic Impact of Same-Sex Marriage in New York City: 2011-2012* quantifying the economic impact of same-sex marriages at the destination level. In the first year, the city saw at least 8,200 same-sex marriage licenses issued, more than 200,000 guests in attendance at the wedding celebrations, and USD 259 million in local economic impact. The second wave of this research (2013–2014) found that same-sex couples expected to use an average of four different NYC-based wedding services for their event and while wedding parties tended to be smaller among same-sex couples, the trends observed in 2012 were still holding up two to three years later. The typical expenditure per guest was an average of nearly USD 500.[50]

Figure 3.1 Countries with national laws allowing marriage between same-sex couples, by year of implementation

| | | | |
|---|---|---|---|
| **Netherlands** | **2000** | **France** | **2013** |
| **Belgium** | **2003** | **New Zealand** | **2013** |
| **Canada** | **2005** | **Uruguay** | **2013** |
| **Spain** | **2005** | **United Kingdom** | **(2013–2014)** |
| **South Africa** | **2006** | **Luxembourg** | **2014** |
| **Norway** | **2009** | **Greenland (Denmark)** | **2015** |
| **Sweden** | **2009** | **Ireland** | **2015** |
| **Argentina** | **2010** | **United States of America** | **2015** |
| **Iceland** | **2010** | **Colombia** | **2016** |
| **Portugal** | **2010** | **Slovenia** | **2017** |
| **Denmark** | **2012** | **Finland** | **(due 2017)** |
| **Brazil** | **2013** | **Mexico: same-sex marriages are recognized and performed in some jurisdictions** | |

Sources: Chart adapted from: McCarthy, N. (2015), 'The Countries Where Gay Marriage Is Legal', Statista – The Statistics Portal, 29 June 2015 (online), available at: www.statista.com (23-03-2017);
with data from: Masci, D.; Sciupac E. and Lipka M. (2015), 'Gay Marriage Around the World', Pew Research Center – Religion & Public Life, 26 June 2015 (online), available at: www.pewforum.org (23-03-2017).

**© Joyfull | Dreamstime.com**

# 3.2 The impact of equal marriage on the tourism sector

This section of the report aims to make an analysis of the impact of equal marriage on the tourism sector from a range of perspectives. While anecdotal evidence strongly suggests that the economic impact has been very positive, interestingly (and perhaps encouragingly) many suppliers such as hotel chains hosting same sex ceremonies and receptions have not recorded same-sex weddings separately to opposite-sex weddings (i.e. all weddings are counted together), thus there is no clear record of the revenue generated through same-sex weddings alone.

One destination stands out in terms of its analysis of the impact of same-sex marriage on the local economy: New York. To date, NYC & Company has conducted two major studies of this, the most recent of which was released in early 2017. The multi-year tracking study on marriage equality found that same-sex marriages generated significant additional revenue for New York City's tourism industry with more than half of same-sex couples holding wedding celebrations in venues across the five boroughs.[51]

Aside from the revenue generated through the additional number of marriages and registered partnership ceremonies taking place, there has been a clear impact on the tourism sector in terms of destination brand image, innovation and competitiveness, as outlined below:

## 3.2.1 A boost to the destination's brand

As the first UNWTO *Global Report on LGBT Tourism* observed in 2012, beyond the economic benefits, the approval of legislation in favour of equality for same-sex couples sends a powerful brand image of tolerance, respect, progress and open-mindedness, resulting in an increase in LGBT visitors, among others. In the same report, Turespaña, the Spanish national tourism organization described how the country's introduction of same-sex marriage in 2005 "undoubtedly brought about a positive change in the image of Spain as a LGBT destination".[52]

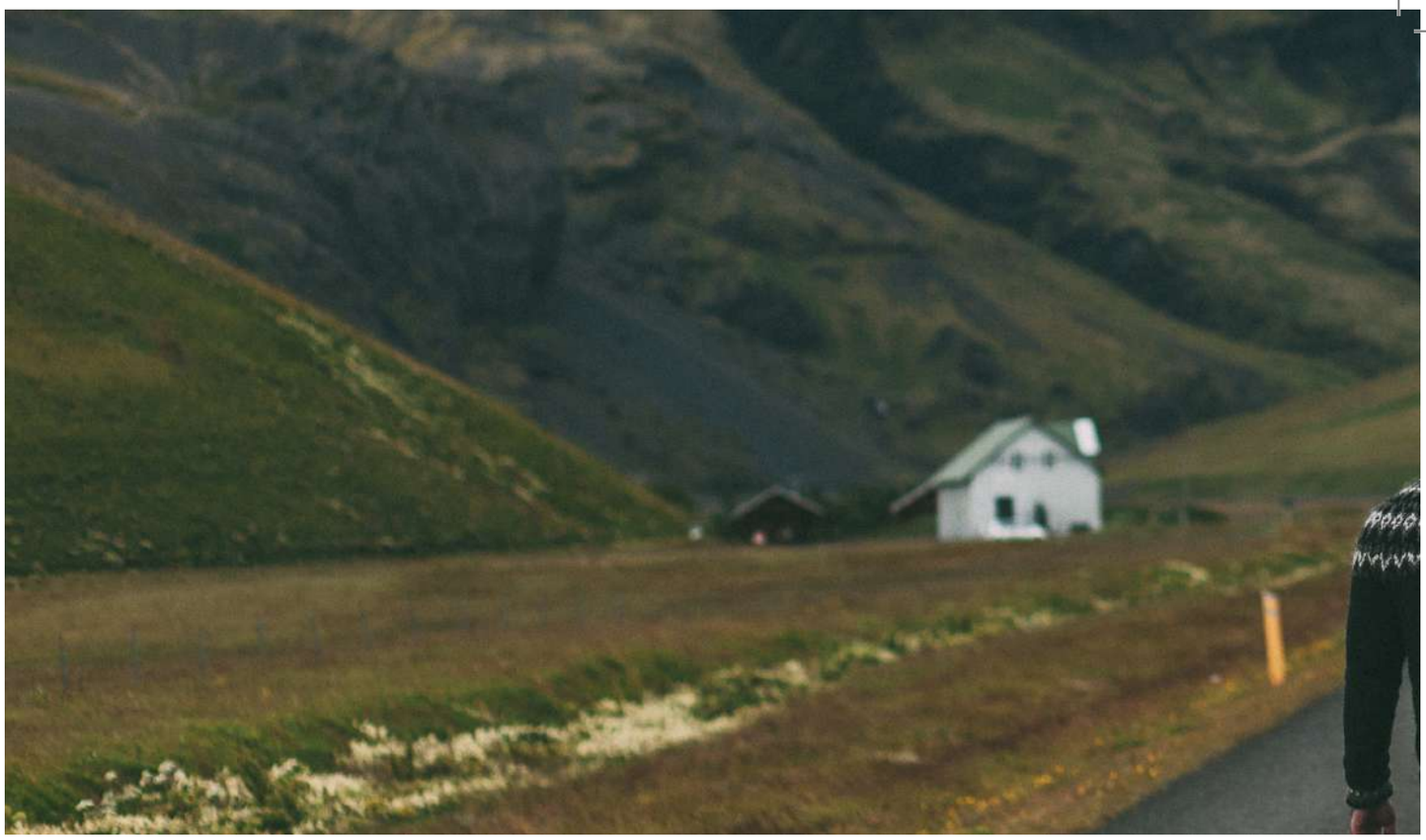
Since that time, many more destinations have been able to capitalise on this effect in order to promote their destination as a great place for same-sex couples from elsewhere to get married (for example the Ireland Says I Do campaign), as a great same-sex honeymoon destination or as an open-minded, tolerant place for all. A parliamentary vote or national referendum result in favour of same-sex marriage typically generates waves of headline news around the world, providing an ideal opportunity for the NTO that is fast enough to extend its media reach beyond what would normally be achievable. Examples include VisitBritain's Love is Great campaign

### 3.2.2 An opportunity for brands to stand out

According to YouGov, "brands that consistently show support for the gay community have a strong public image across all consumers". Many travel brands are part of this trend and have opted for including same-sex couples in their general advertising campaigns. This decision is often based on the calculation that the positive attention and brand-association that it will create will outweigh the cost from the loss of business from disgruntled consumers who are not supportive of LGBT rights. Indeed, in the hours immediately following the landmark ruling on same-sex marriage in the United States in 2015, there was a frenzy of social media activity as travel brands in the country raced to affirm their support for the ruling and be front-of-mind for the consumers (both LGBT and non-LGBT) who would be discussing the ruling on social media.[53]

In the United Kingdom, Virgin Holidays, traditionally known as a family holiday brand, found largely positive reactions from across its customer portfolio following the launch of its *Take On the World* campaign (published in this report) focussed on LGBT customers. Furthermore, other multinational companies that have celebrated same-sex marriage in their advertising such as Ben & Jerry's, IKEA and Google have, as a result, attracted some of their highest-ever levels of engagement on social media.[54]

Source: VisitBritain (2017)



### 3.2.3 Innovation in product development

As the first UNWTO *Global Report on LGBT Tourism* observed in 2012, "the granting of marriage rights for same-sex couples has produced a whole new market segment and providers in both source countries and destinations have been keen to develop new products and services to respond to this".[55] While same-sex marriages are performed in the same way to opposite-sex marriages, there are some nuances in terms of venue choice, group size and other variables.

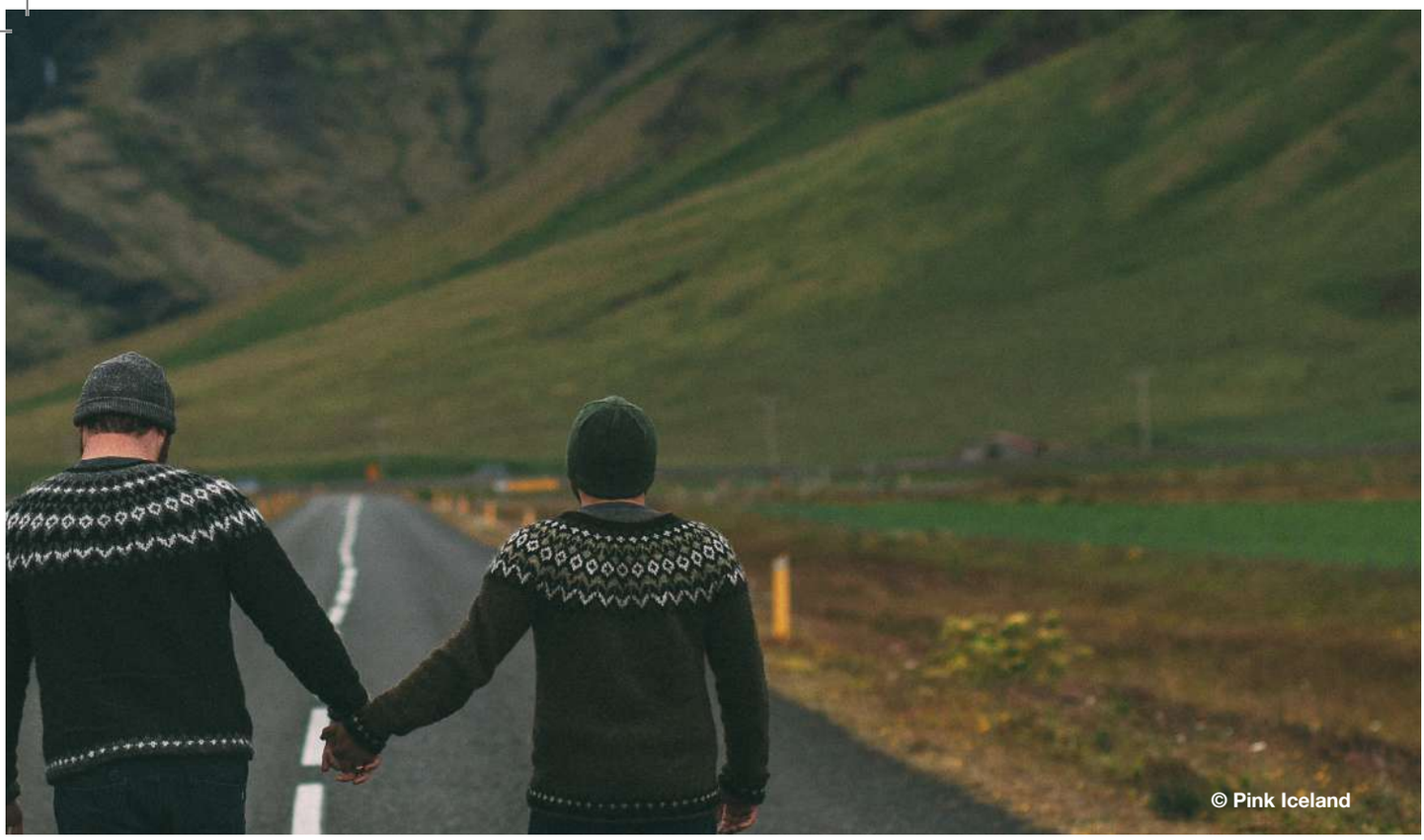
**Preparations**

When planning a wedding, it is customary for many couples (LGBT and non-LGBT) to seek the services of a wedding planner. However, according to a study carried out by CMI, many same-sex couples assume that wedding suppliers that do not explicitly state their preparedness to assist with same-sex marriages are not interested or specialised in this sector of the market. When selecting a wedding vendor (and suppliers such as hotels etc.) same-sex couples can sometimes fear rejection or confusion by suppliers whose assumption tends towards opposite-sex weddings. This underlines the importance of staff training and in reviewing marketing strategies. Studying consumers from the United States of America also found that same-sex couples tend to be older and also paying for the wedding themselves, which may explain a lower guest count (94 vs. 150 for opposite-sex couples).[56]

**The ceremony**

The location for wedding venues depends on the tradition in each country. In countries where couples may choose from any venue with a licence to host weddings, there appears to be great diversity in the type of venue chosen. However the study cited by CMI did find that same-sex couples have a lower preference for religious spaces versus opposite-sex couples (9% vs. 25%). Meanwhile, same-sex couples did express a slightly stronger preference for holding the ceremony at a public park or beach, a hotel or restaurant.[57]

In terms of innovation, the effect of first-mover advantage is also important to consider. For example, a long-standing commitment to LGBT equality by the Granvia Hotel, Kyoto, Japan, has gained the company much recognition, especially after it created Japan's first gay wedding package in 2014. The hotel hosts same-sex couples and arranges an authentic




Buddhist wedding ceremony (though official certificates are not yet issued).

**Honeymoons**

Very much in line with the trend observed among opposite sex couples, same-sex couples are becoming more ambitious and adventurous in their choice of honeymoon destination. Honeymoons provide the perfect excuse for a big-spend *once-in-a-lifetime* trip to celebrate a new partnership, and for the market in the United States of America this appears to favour Hawaii in particular, as well as other beach destinations worldwide and urban destinations in North America and Europe.[58]

It is important to underline that having had their relationship officially confirmed and celebrated at home, it is natural that same-sex couples want to travel as a couple and be recognized as such when travelling. The idea of the *celebration continues throughout the journey* is something for all travel providers (airlines, transfers, hotels, tours) to consider so that they can provide a uniquely tailored service to newly-wed same-sex couples.

Source: Granvia Hotel, Kyoto, Japan

# Case study 5:

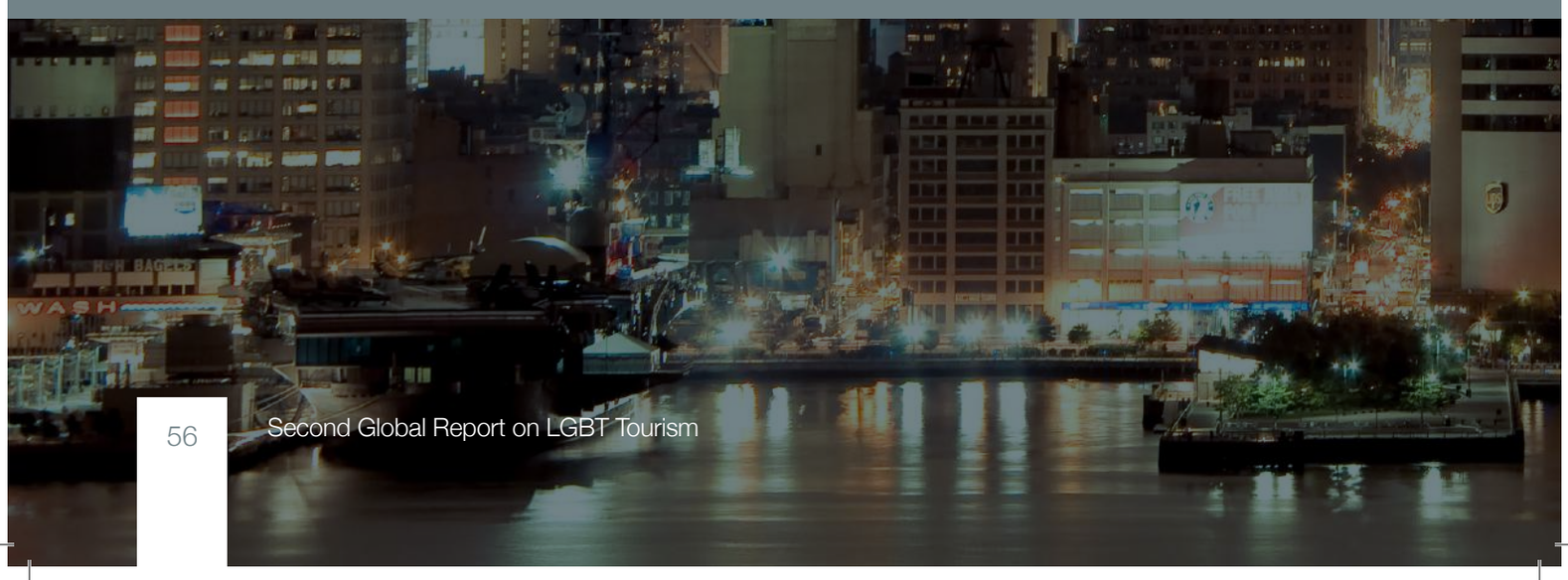
## The economic impact of marriage equality in New York City: a continuing gift to the city

By Donna Keren
Senior Vice - President,
Research, NYC & Company

In the summer of 2012, one year after the passage of New York State's Marriage Equality Act, NYC & Company and the city of New York released the first statistically reliable study *The Economic Impact of Same-Sex Marriage in New York City: 2011-2012* [59] quantifying the economic impact of same-sex marriages at the destination level. In the first year, the city saw at least 8,200 same-sex marriage licenses issued, more than 200,000 guests in attendance at the wedding celebrations, and USD 259 million in local economic impact. While we also tracked and measured opposite-sex couples, the initial focus of this research was on the economic impact of the new law.

The couples who registered and married in New York City between July 2011 and June 2012 came from all over the city, the United States of America and the world. While the marriage ceremonies were most frequently held at the City Clerk's offices in all five boroughs, the celebrations and honeymoons were held in restaurants, hotels, parks, event venues and private homes with flowers, catering, limousines, as well as musicians – all adding to the significant economic impact of the LGBT community.

Over the next few years more states and cities made marriage equality a reality, while couples from the United States of America and international source markets continued to see New York City as an ideal destination for their weddings and honeymoons. The second wave of this multi-year tracking study (2013–2014)[60] supported our initial findings. There were still more same-sex male couples than female couples among the respondents (almost 2:1) and about twice as many opposite-sex couples overall. Same-sex couples

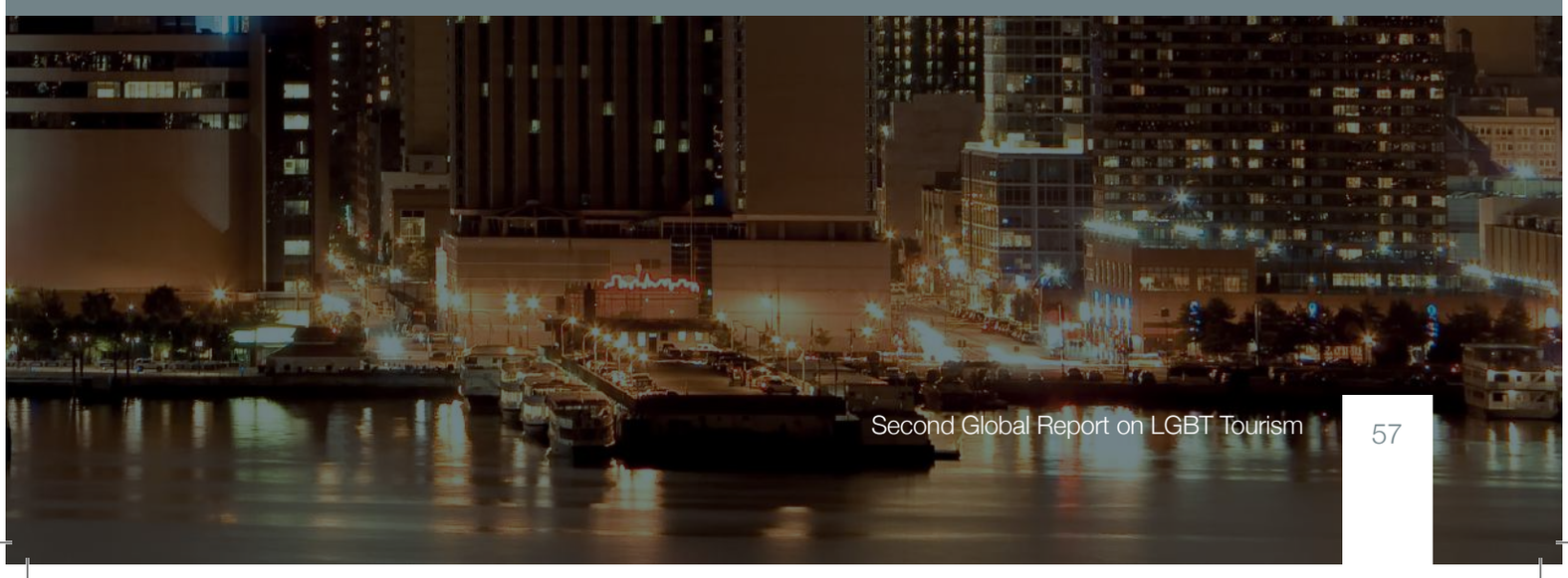


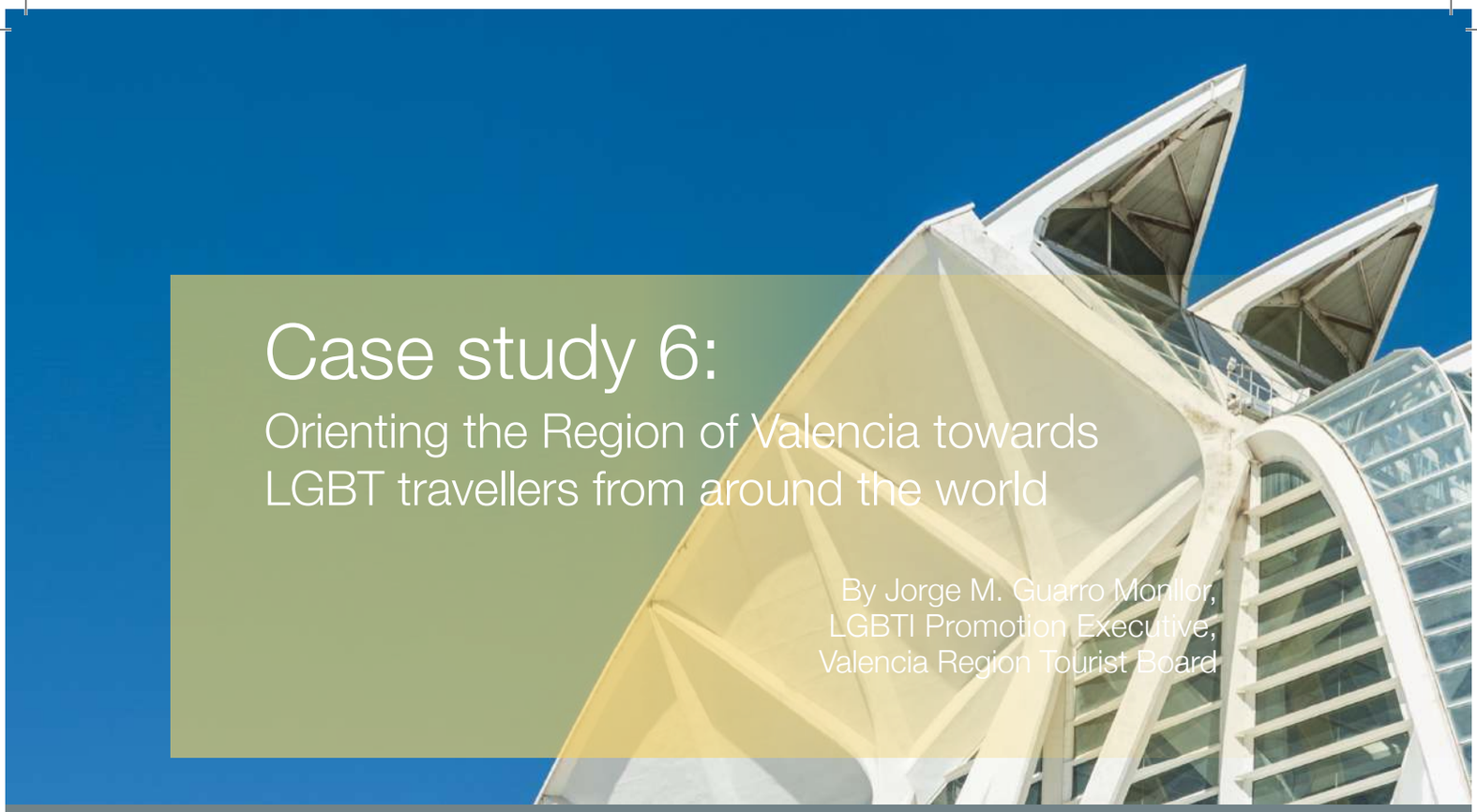
expected to use an average of four different NYC-based wedding services for their event. This was the same as we saw in our first research in 2012. And while wedding parties tended to be smaller among the same-sex couples, the trends we saw in 2012 were still holding up two to three years later. The typical expenditure per guest was an average of nearly USD 500.

In 2015 the Supreme Court decision making marriage equality a national right opened up the possibility for many same-sex couples to marry in their home states or to marry in locations of their choice. Interestingly, however, not only is New York City a key destination for same-sex weddings, the city registers in our on-going surveys as the "number 1" honeymoon destination for same-sex couples regardless of where they live.

Looking forward, we will continue to track the number of couples who register for marriage licenses in New York City, who get married here, and who hold celebrations here in the city. This work will allow us to measure the ongoing spending that occurs as the city hosts thousands of same-sex weddings each year. As in our original study we calculate that this will mean well over USD 200 million in economic impact annually as a result of these marriages and wedding celebrations. The ongoing support for this effort by the City Clerk's Office is a confirmation of the significance of supporting marriage equality in each and every destination.

Source: NYC & Company





# Case study 6:

## Orienting the Region of Valencia towards LGBT travellers from around the world

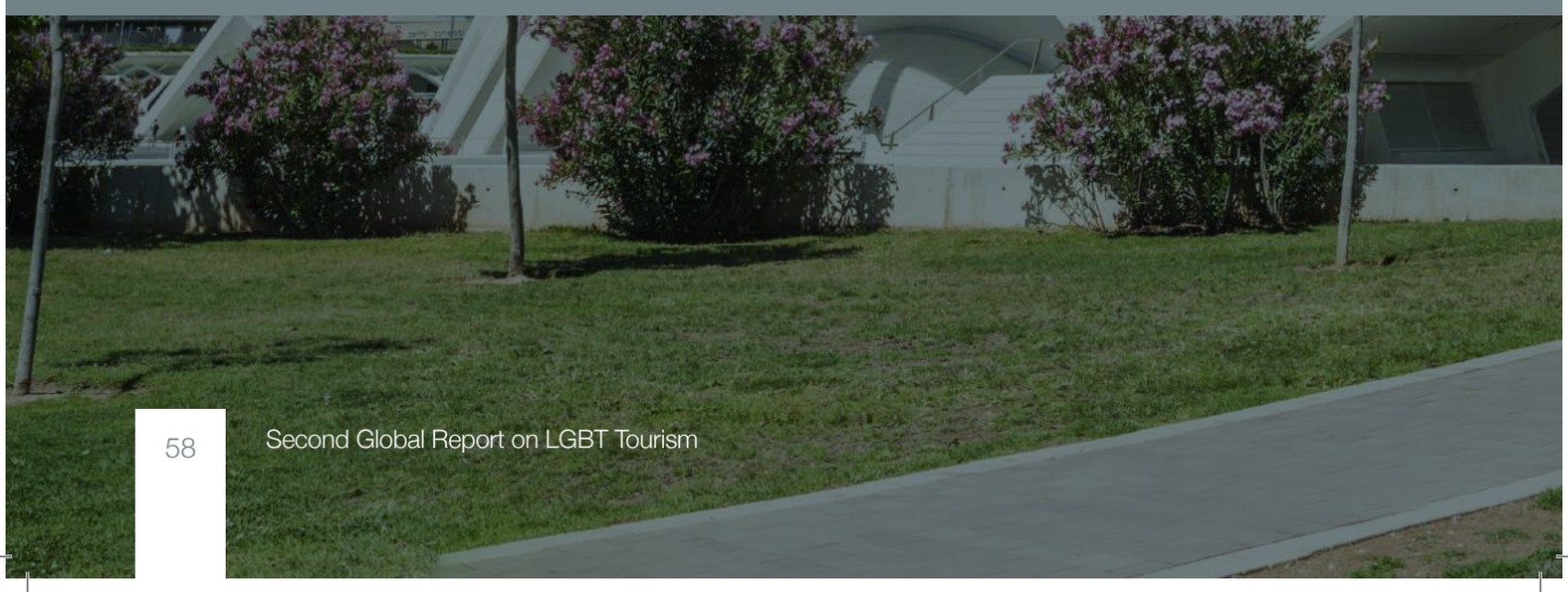
By Jorge M. Guarro Monllor,
LGBTI Promotion Executive,
Valencia Region Tourist Board

The Region of Valencia is one of the 17 autonomous regions in Spain. Its location on the Mediterranean coast and the influence of other Mediterranean cultures that once settled here (Phoenicians, Greeks, Romans, and Arabs among others) made the locals especially tolerant and open-minded and for that reason we consider it to be a welcoming destination for anyone, especially the LGBT community.

After the dark times for the LGBT community during the country's 40-year dictatorship, the advent of democracy in the late 1970s brought a new horizon a for Spanish LGBT citizens with the positive evolution of the social appreciation of LGBT rights and the brand new democracy that meant a starting point for the long way to achieve real equality for everyone. Numerous laws and regulations have been passed after the promulgation of the 1978 Spanish Constitution which states in its article 14 that nobody shall be discriminated against on the grounds of birth, race, sex, religion, and opinion or any other personal or social condition or circumstances.

It was in the 1980s that the current open-mindedness with fresh new ideas burst out, influencing strongly the mentality of Spanish citizens. A new era for artists, musicians, the film industry, painters had arrived to Spain and Valencia was one of the hotspots of the new *movida*, as this new cultural movement was named. Members of the LGBT community took an active part in the new Spain but more as individuals than as part of a group. Spain was changing tremendously.

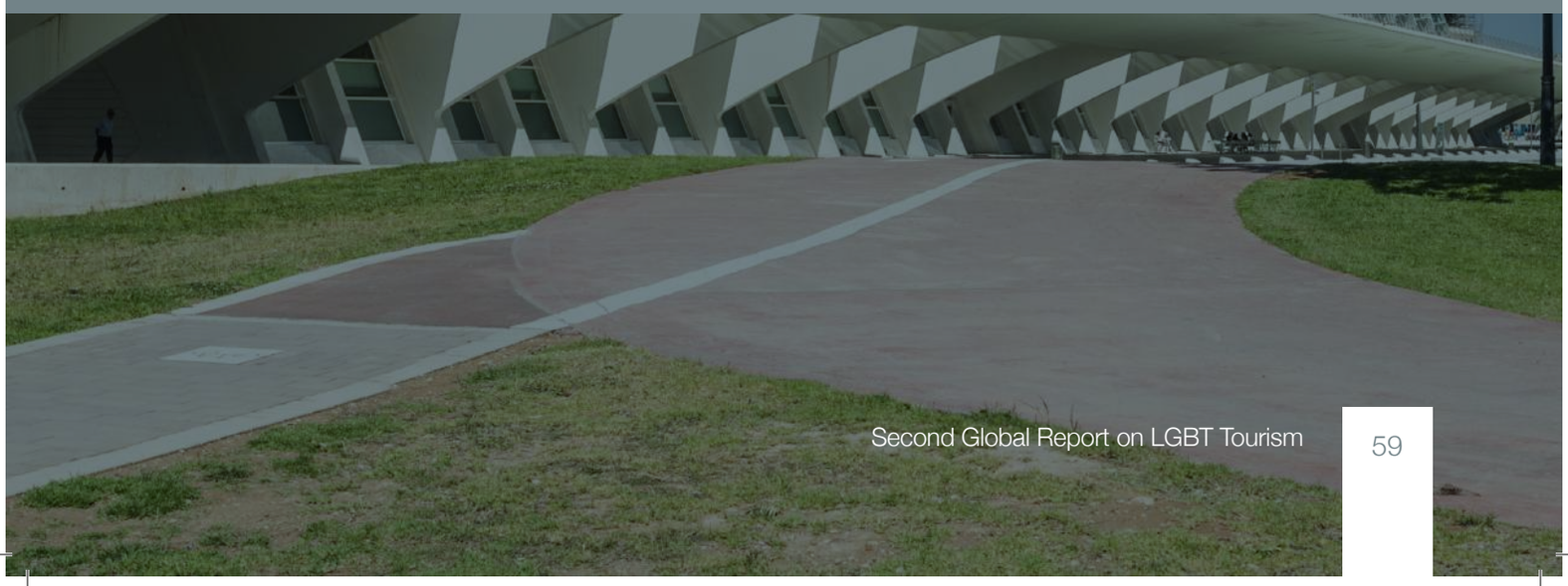
In 2005 Spain became the third country in the world to approve same-sex marriage, which improved the appreciation and



evaluation of Spain by the LGBT community, which seeks spaces of freedom. Nowadays Spain and the Valencia Region are safe and friendly places for LGBT holidaymakers who have become a new target for the tourism promotion policies. Therefore the most important cities and many other tourist destinations within the Region of Valencia are very keen on promoting themselves as LGBT-friendly. New, informative promotional material has been devised: brochures, online information, city maps with the cultural and leisure range of experiences that most interest LGBT visitors, and new images for ad campaigns that feature the best face of the destination for LGBT travellers.

The Region of Valencia Tourist Board is fully committed to the LGBT community and has started to work hard with other institutions to plan and coordinate a regional strategy on LGBT tourism. So, by joining forces with LGBT businesses, local tourism boards promotional organizations, and the most representative local LGBT rights organizations, we have agreed to create a tourist logo of the Region of Valencia for the LGBT community, as well as a specific programme of promotional activities focused on the Region of Valencia as a friendly tourist destination for LGBT travellers for 2016, setting up the basis for future cooperation among all stakeholders.

One of the first decisions made was to become a proud member of the International Gay & Lesbian Travel Association, in partnership with which we have carried out promotional activities such as the FITUR-LGBT Exhibition in Madrid last January, sponsoring a float at the Madrid Pride Parade, the biggest European Pride Parade, last July, and the presence of the Valencia Region in the Stockholm Pride Park, in Sweden.



# Chapter 4:
## Key trends in LGBT tourism

## 4.1
## The diversification of products and destinations for LGBT travellers

The concept of the gay *destination* first came into being as major cities and beach towns in North America and Europe with large LGBT populations of their own became popular places for recreation for LGBT visitors from elsewhere. Today, however, LGBT people are more visible around the world (if not in public spaces, then at least in online communities) and thanks to geo-location based smartphone apps, they can meet much more easily. Furthermore, in line with the global trend and thanks to the Internet as well as improved acceptance and accessibility, LGBT travellers have become more ambitious and adventurous in their travel plans. These factors have forced considerable change in the concept of *gay tourism* today, compared to how it originated in the mid-20th century.

Businesses in many corners of the world have responded to these changes by marketing their travel, accommodation, activity services and much else to LGBT travellers, sometimes with the active support of their local destination management organization (DMO). Around the world, there is considerable variation in whether or how government authorities lend support to these efforts. Usually it is capital cities, or regions with more progressive politics that lead the way. In others, LGBT marketing is left to individual businesses or chambers of commerce with tacit support from the authorities (*tacit* either because there is no specific LGBT marketing programme in place, or because to carry out vocal support of LGBT marketing risks political opposition).

Whether in unreceptive, indifferent or friendlier LGBT destinations, the role that small businesses play is crucial. Often set up by LGBT people or their allies, small hotels and guesthouses, tour companies, bars and cafés offer a local welcome that benefits from a shared LGBT identity and provides a degree of reassurance of acceptance to LGBT travellers from far away. Such businesses can provide authorities looking to approach the LGBT market with very useful insights on the profile of LGBT visitors gained at the *front line*. It is for this reason that IGLTA provides materials to help businesses to publicly identify as *LGBT-owned*, and

why the IGLTA Foundation underwrites memberships for small LGBT businesses in emerging destinations.

Gay ski weeks or film festivals have become well-established in many destinations around the world, however, in truth, there is considerable diversity in the destinations and small businesses catering specifically to LGBT travellers today. From surf classes in Brazil, to guided tours of Tel Aviv, Israel, and from hiking to Machu Picchu in Peru to relaxing yoga workshops in Thailand, dedicated LGBT-owned tour operators around the world are hosting LGBT visitors in a safe, respectful environment and building bridges with their own local communities. IGLTA features many such organizations among its membership, as well as destinations seeking to understand better the characteristics of the LGBT market and support local businesses in reaching this market.

### 4.1.1 When adventurous LGBT travellers encounter the destination dilemma

Since LGBT travellers are aware of the risk of being discriminated against, most will pay close attention to prevailing social attitudes and the quality of life of LGBT people in the destinations they plan to visit. As described earlier in this report, there is considerable variation in the way LGBT people live around the world and this is a factor that LGBT travellers typically take into account when choosing where to travel. Some destinations have been pioneers in activism and advocacy on behalf of LGBT people, boasting events and a diverse reflection of LGBT cultural life; however destinations in some parts of the world can be hostile or dangerous to LGBT people who disclose their sexuality or gender non-conformance.

As LGBT people have become more independent and adventurous in their travel plans, this has sparked a vigorous debate over whether it is right for an LGBT individual to choose to spend time and money in a place where LGBT people are known to suffer abuses to their human rights. The position of IGLTA is that this choice is ultimately a personal one, but recommends that travellers should:

- Research and respect the laws and customs of the countries they plan to visit (also the responsibility of travel agents and tour operators selling and advising on destinations);
- Keep the contact details of their embassy to hand in case of arrest or detention; and
- Consider using IGLTA and other local LGBT trade associations as a resource for finding LGBT owned and affirming businesses.

Furthermore, throughout its history, IGLTA has maintained a policy of *not boycotting* individual businesses or destinations for discrimination, believing that the negative impact of such action on the LGBT people working and living there outweighs the cost to the business or destination from lost revenue.

There is also a value in encouraging LGBT people to *push boundaries* by visiting less-welcoming places as many argue that the transformative power of travel is why lesbian, gay, bisexual, transgender or questioning travellers should see the world and create change.[61]

### 4.1.2 Recent innovations in LGBT tourism and marketing

**Travel companies in Latin America leading the way in raising awareness and encouraging respect**

During 2016 a range of Latin American travel companies including Aeroméxico, Axel Hotels, FriendlyMap and the Cámara de Comercio Gay Lésbica de Argentina joined forces

to cooperate on the campaign #NecesitamosMásBesos (we need more kisses) to help encourage compassion and respect among the public for same-sex relationships.

**#LoveTravels takes on an extra twist**

Since 2014 Marriott International – a long-standing supporter of inclusion and diversity among its stakeholders – has celebrated the many faces of LGBT tourism through its #LoveTravels campaign. This multi-faceted campaign has invited travellers around the world to create and share expressions of love – however personally defined. Since the campaign started it has sought variously to highlight the stories of individual members of the LGBT community, celebrate equal marriage in the United States of America and, notably in 2016, to lend support to transgender lives and leaders.[62]

**The world's first guide for LGBT business travellers**

Business travellers have little discretion in where they go for work and for LGBT business travellers this experience can be more than confusing; it can be downright frightening since something as simple as communicating to your partner on social media raises caution flags. To help business travellers make informed decisions about issues such as how to stay connected, meet local LGBT people privately and whether to be open about their sexuality at work, in April 2016 the guide *ManAboutWorld* launched the first guide to LGBT Business Travel.

**Virginia is for Lovers**

In September 2016, Virginia Tourism Corporation (VTC) in the United States announced the launch of its first state-wide LGBT tourism marketing initiative, including a new landing page for LGBT travellers and the sale of *Virginia is for Lovers* Pride merchandise. VTC also created a LGBT Tourism Resource Guide for the travel and tourism industry in the state.[63] (See: www.virginia.org/LGBT)

# Case study 7:

## Understanding tourist consumer behaviour in order to develop a specific LGBT tourism product in Vietnam

By Duy Vu Hong, BA; Ha Nguyen Thi, BA; and Thuy Nguyen Thu, PhD
Faculty of Tourism Studies,
University of Social Sciences and Humanities,
Vietnam National University, Hanoi

In recent decades LGBT tourism has become extremely popular and well-developed in many countries around the world. Many companies in the field of tourism and hospitality have created specific services aimed towards this potential market. Scientific research was conducted for the purpose of learning more about the Vietnamese LGBT community's travel needs, consuming habits and hobbies in order to help contribute to the development of tourism products specially designed for this group. Our study was started in 2013 and seeks to answer the following questions:

1. What were the key features that highlighted the Vietnamese LGBT people's consumption trends and their expenditure on tourism?

2. Which basic services in a specialised LGBT tour would draw their interest? Any difference among the generations?

3. What kind of problems or obstacles has the individual of this community often encountered during a regular tour?

4. In the near future, could Vietnamese travel agents shape and develop specific tourism products for the LGBT community?

**What did we find?**

- The majority of both groups surveyed in Vietnam and North America decided on the do-it-yourself option while planning a trip. Only a part of these groups chose to go through a travel agent;

- Both groups favoured leisure-oriented tourism and backpacking;

- With regards to recreational activities, there was a slight difference between the two groups. The North America LGBT community tended to visit bars and clubs more often than the Vietnamese one. Meanwhile, the frequency of going to cinemas and theatres was higher with the Vietnamese LGBT community; and

- The two surveyed groups shared the same favoured selection of tours including landscapes trips, cuisine,

© Thuong Tran | Dreamstime.com

restaurants, various forms of recreation and LGBT-friendly destinations.

In a near future, developing a specific tour product for LGBT travellers in Vietnam is possible; however, businesses need to consider several factors:

- The customers from the LGBT community required nearly similar activities and travel demands as the traditional tourist groups; however, these activities should be not only open and safe, but well-accepted and understood by non-LGBT residents;

- Relaxing destinations, especially beaches are central to designing specific tourism products for Vietnamese LGBT communities;

- The favourite value-added travel services and recreational activities of LGBT travellers were the urban-natured ones, e.g., bars and clubs, cuisine and restaurants, shopping sites and well-known tourist attractions; and

- Most of the respondents suggested that the LGBT tour providers needed to support the local LGBT community as well as showing commitment to their products. In addition, ad campaigns and mass media promotions were noted to be essential.

**Based on our research, what do we recommend?**

LGBT people might find it difficult when joining a regular tour and can become quite hesitant. This is what has made tour providers worldwide consider creating a specialized tour for this potential niche market. Therefore, LGBT tourism truly is a promising niche market for tourism in the world in general and particularly for Vietnamese tourism. Nevertheless, it will take time since the stigma attached to being LGBT might cause disapproval among traditional Vietnamese people. Furthermore, a friendly team to serve LGBT needs a huge investment both in headhunting and training, as there are a large number of employees involved in creating a package tour. Examples include: hotel staff, restaurant staff, a driver, a tour guide, etc., each of whom must also show their acceptance towards LGBT tourists.

# 4.2 The status of LGBT consumers in emerging outbound markets

The massive and unprecedented economic growth among some of the world's most populous countries has become one of the defining phenomena of the early 21st century. This fact alone might suggest that the emerging markets will offer the greatest promise for future growth to destinations and businesses looking to attract new groups of LGBT travellers, since there are LGBT people in every country. However the attractiveness of a country as a source market for LGBT travellers depends largely on the reality of daily life for LGBT citizens in that country (and even within regions of that country, which may have very different social attitudes and varying quality of life). How is their sexuality recognized (or condemned) by law? How are same-sex relationships perceived in society? How are LGBT issues discussed in the media?

On a general level, it would be logical to assume that since rapid economic growth is making international travel a reality for vast numbers of consumers in countries such as China, India, Indonesia, Brazil, Mexico and Turkey, discretionary spending on travel by LGBT people in those countries would rise in line with that of the general population. However, according to the Open for Business Report cited earlier in this report, on a general level the discrimination present in many of the world's most rapidly emerging markets holds back LGBT individuals' potential to get proper access to healthcare, get good jobs and grow professionally or creates other factors that restrict their earning and spending potential. There is much that business and government must still do to secure rights for LGBT people so that they may flourish in society and realise this potential.

Therefore, it follows that those countries that *have* made the most progress in terms of securing rights for their LGBT citizens present a more attractive place to market LGBT-relevant goods and services since public discussion and promotion becomes easier.

## 4.2.1 LGBT visibility and the transformative power of social media

Today, the go-to forum for public discussion of any kind is social media. Aside from the opportunities that it presents for direct consumer marketing, social networks such as

Facebook, Twitter and Weibo are forcing great change in the quality of life of LGBT people around the world since they enable ha online communities to form around particular interests and organizations. They make it possible to share advice, news and gossip and most importantly help LGBT people to understand that they are not alone. It also offers LGBT people in developing countries a glimpse of the way that their counterparts live in more equal societies, giving hope that another way of life is possible.

For this reason, the power of social media to change wider public perceptions in emerging markets should not be underestimated. As social media allows LGBT *allies* to express solidarity with LGBT issues and mark themselves out as supportive and progressive, it could be argued that it has been the biggest influence on the generational difference in attitudes towards LGBT acceptance that has occurred worldwide.

The role of social media in travel marketing has been widely documented in recent years, and it is highly relevant to the LGBT segment since it allows for precise targeting of different segments based on their search history or 'likes'. Whether for campaigns by hotel brands or inspiring travellers on their next destination choice through attractive photos on Instagram, the world's biggest mainstream social networks are being used by brands and destinations wishing to appeal directly to LGBT consumers. Specialised businesses such as Pink Banana Media and Outfluential help travel industry organizations reach this market segment and many LGBT travel influencers, such as Dopes on the Road, Travels of Adam and the Nomadic Boys, produce social media campaigns for tourism companies in addition to their own content creation. Finally, online dating platforms and apps have also forced great changes in the way LGBT approach their travel decisions, as explained in the adjacent section.

### 4.2.2 Online dating apps and LGBT tourism

Smartphone dating apps and the websites that preceded them have now become a common feature in the world of *social networking*. One of the first apps of this kind, Grindr, was targeted at gay men and has now become so

widely adopted that it is estimated to be used in nearly 200 countries worldwide, with 1 million users interacting via the app every minute.[64] A survey of 2,023 online respondents conducted by Travel Gay Asia and Gay Star News in 2016 found that 87% of respondents used one or more gay dating apps.[65] Used primarily for finding romantic partners, friends and casual encounters, apps such as Grindr, Scruff, Planet Romeo, Her, Moovz, Tinder, Hornet and Blued have effected major changes in the way that LGBT people meet. When travelling, they have become a widely used method of asking local people where to go and what to do. This, in addition to their widespread use, has made them attractive partners to event organizers or travel and lifestyle brands seeking to reach the LGBT traveller.

The massive growth in use of online dating apps has also brought with it greater responsibility. Most apps now carried detailed advice on sexual health and travelling safely when in countries which criminalise homosexual acts. Some have also helped their users to become more politically aware or have sought to identify and help LGBT refugees fleeing persecution.

**Do higher-volume markets offer greater potential?**

Some emerging outbound markets could be considered attractive due to their considerable population size. By applying a conservative 3% LGBT population estimate to population figures obtained from the United Nations (2015 revision),[66] the approximate LGBT population of China could be calculated at 48.3 million, India 39.3 million, Indonesia 7.7 million, Brazil 6.2 million, Russian Federation 4.1 million and Mexico 3.8 million. However caution must be exercised here. Each of these countries is very different in terms of economy, society, culture, demographics and political systems. Furthermore, within each country, age, place of origin, income, family, ethnic and religious background can influence heavily one's economic potential and experience as an LGBT citizen.

### 4.2.3 Focus on China

In recent years destinations and travel businesses worldwide have turned their attention to the Chinese outbound market. According to estimates by Community Marketing & Insights (CMI) based on study and extrapolation, there are 65 million LGBT people living in Mainland China, and the purchasing power of the community is around USD 470 billion per year. Further insights on the characteristics of the Chinese LGBT community were kindly provided by CMI:

**The most visible LGBT Chinese are young**

In CMI's research experience, about 90% of Chinese LGBTs who are reachable through LGBT social apps, media and events were born after 1980. This is a period when China opened its doors to the world and progressive ideas started to flow in, while the criminalization and "illness" of homosexuality had minimum impact on them.

**Visible LGBT Chinese are largely urban**

Just as in many western countries, the comparative economic advantage and diversity of big cities attracts young Chinese LGBTs.

**Chinese LGBTs will be a major source of LGBT travellers worldwide for the next several decades**

First, young Chinese LGBTs have started to explore the world. Over 1 in 4 Chinese LGBTs have taken at least one leisure trip outside Mainland China, according to CMI's China LGBT Tourism & Hospitality Study.[67] Second, dwelling in the most economically advanced areas gives Chinese LGBTs the financial capability to travel, and provides access to premium travel trends and information. Third, Chinese LGBTs have an age advantage. Most active members are in their 20s and 30s, and their spending capability will only grow in the next three to four decades. Though it is possible that some LGBTs may go back to the closet and enter heterosexual marriage due to family pressure, most out LGBTs are expected to maintain their status in the community as both the visibility and acceptability of LGBT people improves.

**Lesbian and bisexual women aim to travel more, in line with the general trend for the China outbound market**

Based on data from CMI's Inaugural China Tourism & Hospitality Study,[68] 30% of lesbian and bisexual women have taken at least one leisure trip outside Mainland China compared to 22% of gay and bisexual men. In addition, women are more likely to identify as mid-price range

travellers than men (39% vs. 20%); men are more likely to identify as a non-traveller and budget traveller. The results are not a surprise. According to the China National Tourism Administration, in the first half of 2016, the makeup of outbound travellers is 58% women and 42% of men.

*Information provided by: Lu Xun,*
*Director of Quantitative Research, Community Marketing & Insights, Inc.*

**Travel motivations and travel preferences**

Chinese LGBT consumers behave very similarly to their non-LGBT peers when it comes to travel. They are first Chinese travelers then LGBT travellers, sharing the same interests and concerns.

**Mobile is the key in reaching the Chinese LGBT travellers**

In a country where a majority of consumers now access the Internet through mobile devices, it is no surprise that mobile platforms become the preferred channel of travel planning, booking and sharing. China's dominant social media platform WeChat now has over 800 million monthly active users and a 93% penetration rate in China's first-tier cities (where a majority of Chinese LGBT consumers reside).[69] Chinese LGBT consumers may subscribe to certain WeChat accounts that provide content of particular interest to them. China's leading gay and lesbian social apps – Blued, Zank, Aloha, Rela and Lesdo, to name a few – have all expanded beyond their communication function and begun to offer lifestyle information and travel tips. Blued and Zank have both organized exclusive tours to popular LGBT destinations like Bangkok, Vancouver and San Francisco.

**Safety is top priority**

In addition to LGBT friendliness, Chinese LGBT travellers value safety as their top priority. They are likely to avoid destinations where the risk of terrorism is perceived to be high or places that are currently rattled by massive protests or political turmoil.

**Visas are a key consideration**

Visa requirements remain a major hurdle for many Chinese LGBT consumers. Many of them are younger and have very little savings, making it difficult for them to meet the minimum requirement for a successful visa application for destinations like Europe or the United States of America. As a result, they tend to prefer destinations that do not require a visa or have relatively easy requirements like Thailand or the Republic of Korea.[70]

Despite the increase in acceptance of LGBT people in Chinese society, it is still a censored topic in Chinese media. Destinations who wish to attract these consumers have to walk a fine line between being specific and explicit. They must adopt a more subtle and creative approach in their marketing efforts to target the specific audience without offending government censorship.

Away from the pressures of work and family life, travel offers the opportunity for LGBT Chinese (especially same-sex couples) to live as they would truly wish. One destination, West Hollywood, capitalised on this concept by hosting seven same-sex Chinese couples in June 2015 in association with Chinese online commerce giant Alibaba and popular dating app Blued. Event organizer Charlie Gu of China Luxury Advisors explained at the time: "for a company like Alibaba there is a strong business interest in this. As a publicly traded company in the United States they wanted to elevate their status and participate in the global business community and do the right thing".[71] The event also helped to cement the position of Los Angeles as a welcoming place for LGBT people in the minds of LGBT Chinese consumers.

*Information provided by: Xiaofeng (Charlie) Gu,*
*Director, China Luxury Advisors*

# 4.3 The emergence of the millennial LGBT traveller

In order to make products and services appeal to specific groups of consumers, marketers frequently classify consumer groups according to certain characteristics, of which age is a common denominator with labels applied to different generations. Assuming that people start to make independent consumer decisions once they reach their late teenage years as they start to acquire some degree of financial independence, *millennials* are currently the youngest generation of independent consumers, aged, at the time of publication between 15–34 years.[72]

For the global travel and tourism industry, this means that the race is now on for major travel brands and destinations around the globe to understand the next generation of business travellers, honeymooners, family travellers and all the other adult consumers, who will, in the next two decades, become the main consumers of a whole variety of travel products and services.

This is especially important for those who are interested in marketing to the LGBT consumer, for one critical reason; from the 'Baby Boomers', through 'Generation X', 'Generation Y' and now 'Generation Z' (currently 18 and under), a massive generational and global shift in attitudes has occurred around the world towards acceptance of those who have a different sexual orientation and/or gender identity. Indeed, for many young people around the world, the issue of sexual orientation and gender identity is increasingly a non-issue.[73]

## 4.3.1 The generational divide on homosexuality

Even in countries where homosexuality is not accepted across the population, a breakdown of statistics by age group reveals that it is younger age segments that are the most supportive. For example, a survey of 37,653 respondents in 39 countries carried out by Pew Research Center in 2013 found that while in many countries, views of homosexuality vary across age groups, with younger respondents consistently more likely than older ones to say homosexuality should be accepted by society. Age differences were particularly evident in The Republic of Korea, Japan and Brazil, where those younger than 30 were found to be more accepting than those ages 30–49 who, in turn, are more accepting than those ages 50 and older. Furthermore, the research found that Mexicans and Chinese aged 18–29 are more likely to be accepting than those in each of the older groups, while in the Russian Federation, El Salvador and Venezuela, those younger than 30 are more tolerant of homosexuality than are those ages 50 and older. Among the more mature outbound markets of North America, acceptance levels among millennial-aged respondents were much higher; 90% in Spain, 87% in Germany, 87% in Canada, 86% in Italy, 79% in the United Kingdom and 70% in the United States of America, each consistently showing higher levels of acceptance than older age groups.[74]

As section 4.3.4 below explains, this generational shift in attitudes is likely to have important consequences for LGBT travel product development and marketing in the future. Those looking to reach this market will have to find innovative ways of making their product attractive to an audience which feels less defined by their sexuality, or the need to hide it from wider society, while at the same time recognizing the need to welcome those who feel *different* from the mainstream and want to express this through their travel choices.

### 4.3.2 What is behind the shift in attitudes?

Possible reasons for this generational shift include:

- **Visibility, particularly through social media:** Today LGBT people and the issues affecting them are common on social media, the go-to communications channel for younger generations. The visibility of others helps generate confidence in "coming out" to friends, family and colleagues, a trend that is self-perpetuating.

- **Greater plurality of LGBT lifestyles:** The Internet and changing social attitudes have helped to move public perceptions of what it is to be LGBT beyond the stereotypes.

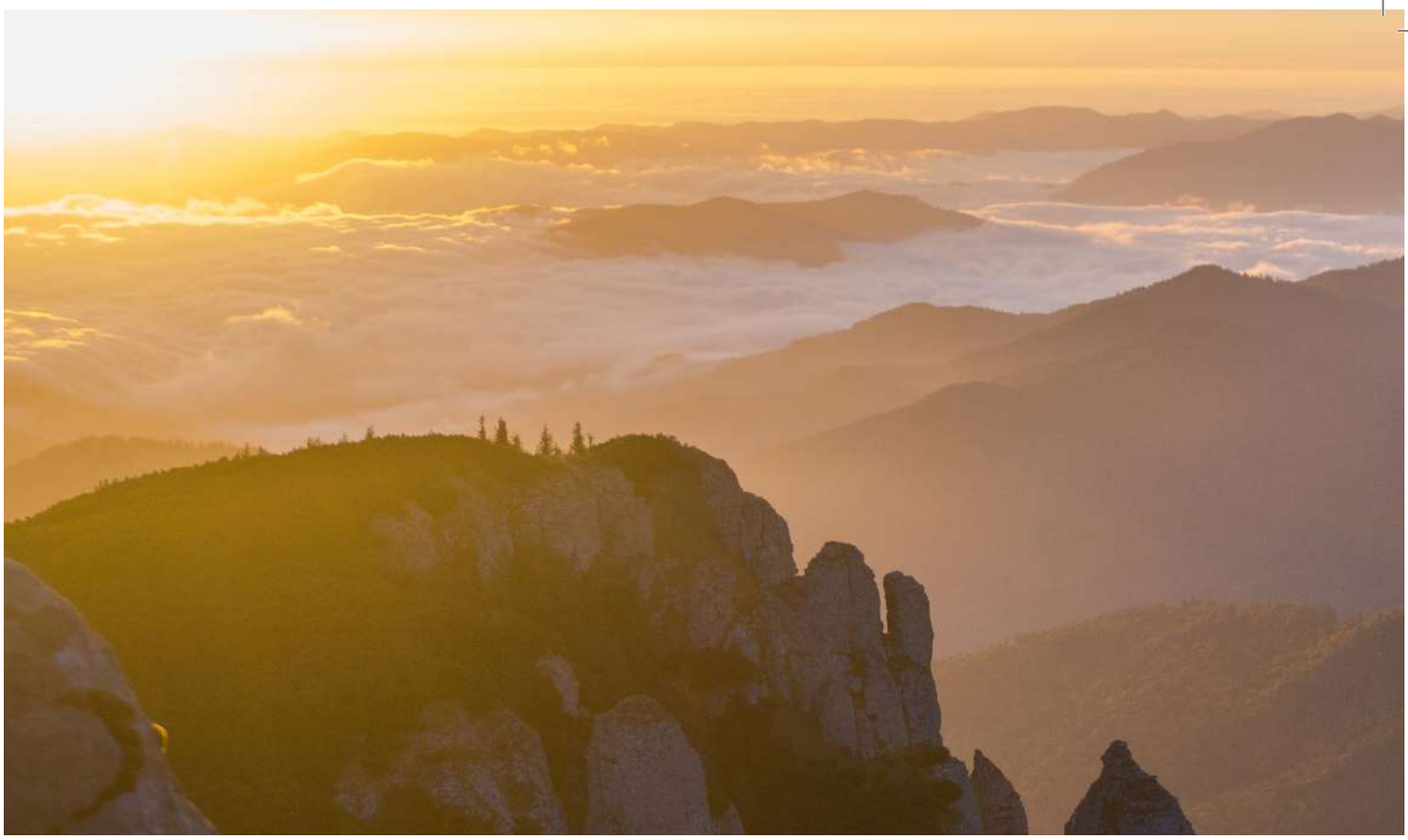
- **Visibility creates more allies:** Increased visibility of LGBT people to those who are *not* LGBT can help to engender empathy, solidarity and understanding, rather than outright rejection.

- **Celebrity support:** Both of the processes above are reinforced when celebrities choose to come out as LGBT, or publicly announce their support.

- **Urbanisation and changing family structures:** The interconnected processes of urbanisation (particularly among the young who move to cities to learn, find employment and romantic partners) and the evolution of traditional family structures (through divorce, family relocations) mean that younger people today have grown up more used to fluid family structures.

- **LGBT visibility in the workplace:** Businesses are more alert to the position of LGBT people in the workplace, with specific policies to ensure that their employees are properly recognized and supported.

- **Changes in the law:** In some countries, government policy aimed at tackling LGBT discrimination and addressing young people's emotional wellbeing (supporting LGBT people when they are young) helps to underpin young LGBT people's confidence and personal development from an earlier age.



### 4.3.3 How do millennials travel differently?

Across the globe young people tend to go through the same joys and pains of youth, yet throughout this period their tastes and attitudes do not stay the same. The life choices millennials make are also strongly defined by the time and place in which they grow up. Nevertheless, there are some factors broadly common to millennials globally which distinguish them from other age groups in the way that they travel:

- **Constantly connected:** Millennials are the first generation to have grown up in the era of 'Internet everywhere'. They are used to being constantly connected, and grew up in the age of online commerce. They have also become fluent in metasearch, accustomed to booking last-minute and finding out what to do while 'on the go', often from local people through dating apps and other social media.

- **Seeking interaction:** Millennials also expect to be able to reach friends, family and business effortlessly via social media; however, since technology can be isolating, offline interaction is also important too. Many hospitality providers have changed their public areas to improve opportunities for social interaction.

- **Happy to share:** For various reasons, millennials are the generation to have led the growth of the sharing economy, such as home, car and meal sharing via new platform tourism services (P2P platforms).

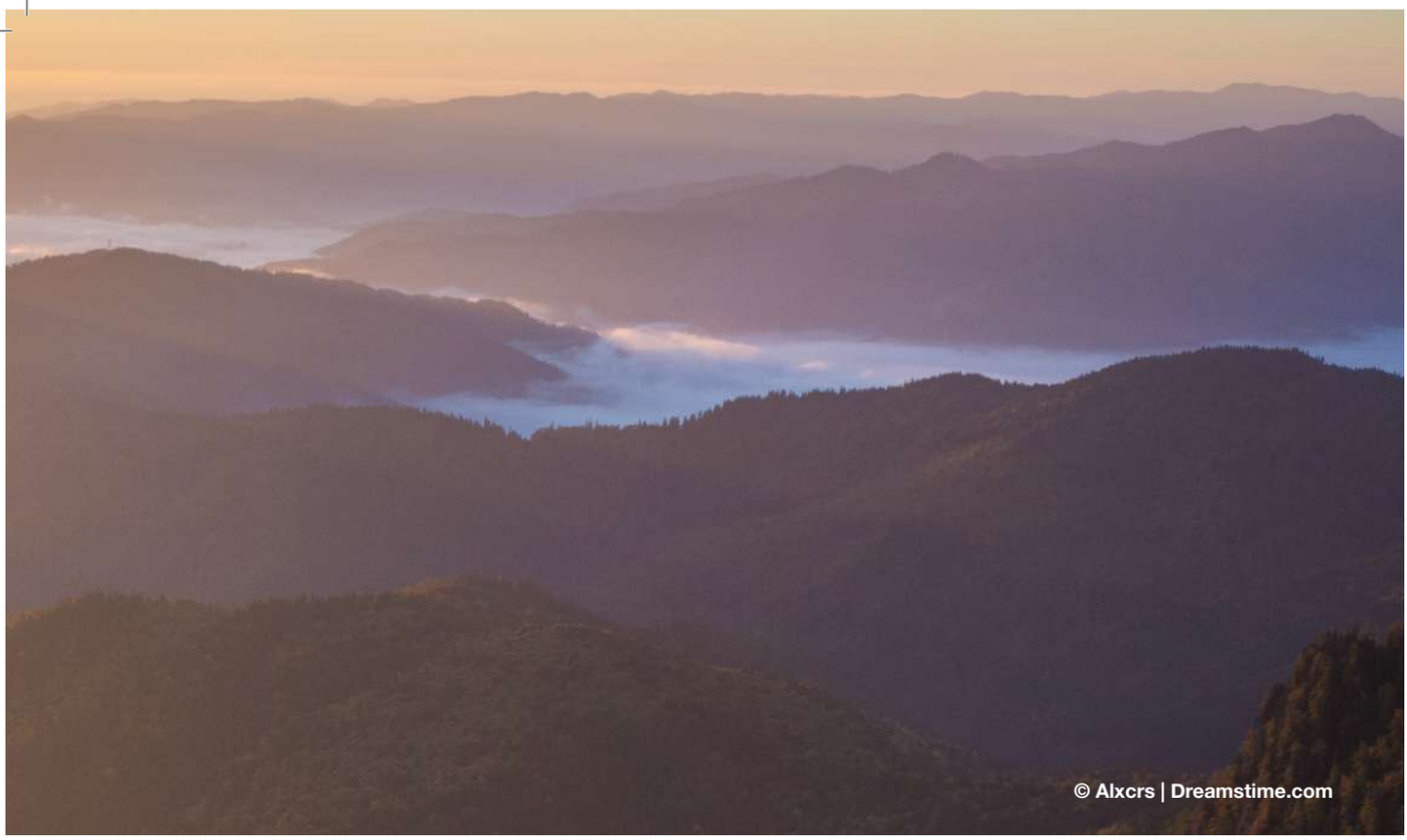
- **Seeking authenticity:** Growing up in the era of globalisation means that travel experiences with a distinctly local flavour (especially food) take on extra special importance for this generation.

- **Selective spending:** Online planning and booking has enabled millennials to be choosy about the travel products and services that they buy, mixing budget and luxury along the way. Authenticity (e.g., local street food) may well be preferred over sterile luxury.

According to the 21st Annual LGBT Tourism & Hospitality Survey by CMI, in comparison to other age groups (Generation X, Baby Boomers), LGBT millennial travellers in the United States of America are:[75]

- **More likely to use public transport or ride-sharing** options while travelling (perhaps reflecting a lower budget, or decreasing car ownership among this generation);

- **Least likely to be influenced by a hotel company's LGBT-friendly reputation** when seeking a hotel (perhaps due to the assumption that today all hotel chains are gay-friendly);




- **More likely to book shared economy accommodations** (this generation has traditionally led in sharing economy engagement, both as users and providers of shared services); and are

- **Most interested in cuisine** as a reason to travel. In choosing where to eat, they are most influenced by positive reviews from websites and apps.

### 4.3.4 What are the implications for those interested in marketing to the LGBT millennial traveller?

From the factors outlined above, we could surmise that:

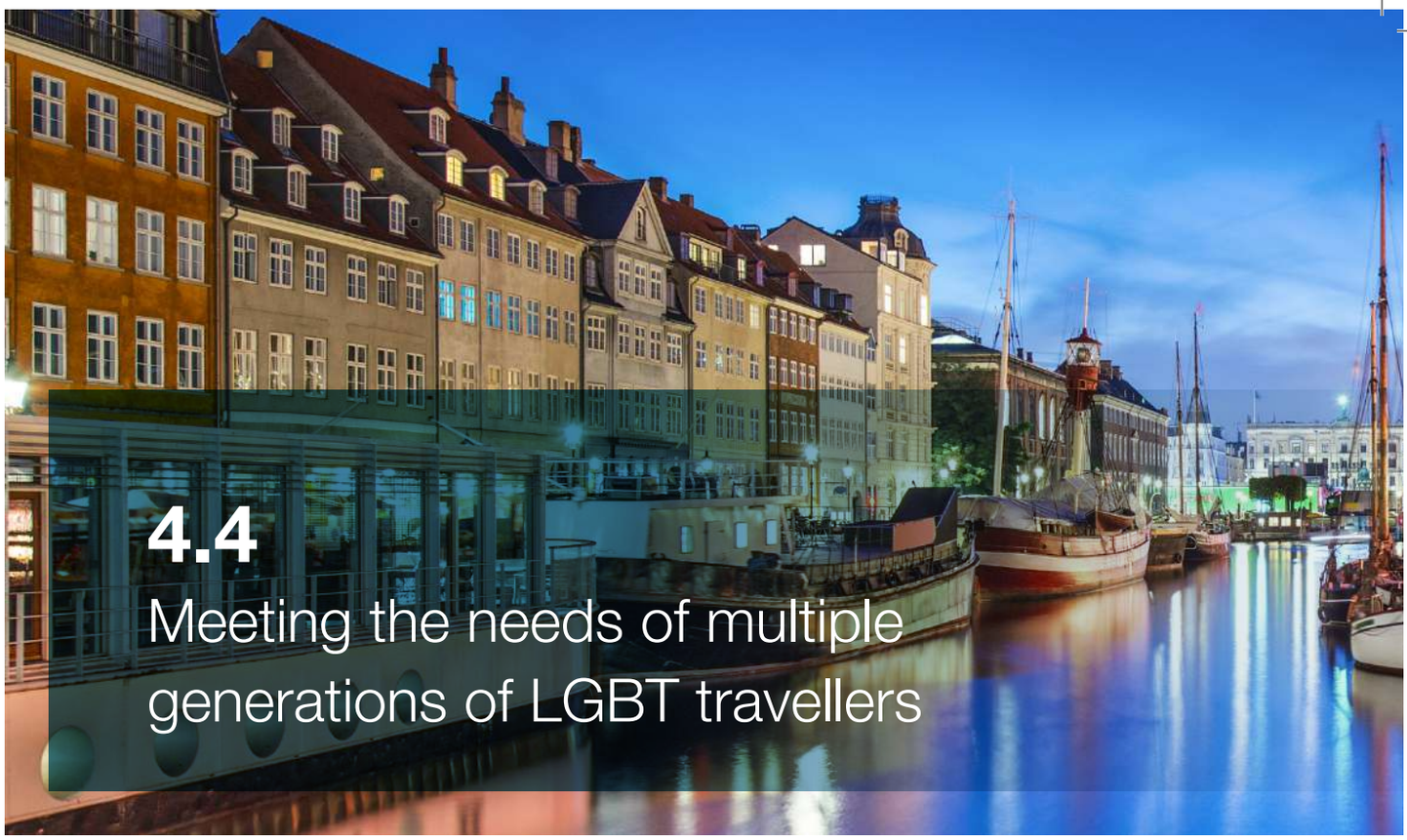
- Millennial LGBT travellers are likely to be more comfortable and open about their sexuality and expect the same from travel service providers, to the point that it is not an issue;

- In terms of product and marketing approach, they prefer to be reflected as part of mainstream advertising, rather than be targeted or grouped apart based on their sexuality;

- This silent generation researches and books travel products and services online, expecting well-tailored personalisation in what is offered;

- Personalisation also means offering a very modern reflection of LGBT people, moving beyond stereotypes to encompass greater diversity in ethnicity, body types, background, tastes in music, fashion, etc.; and

- While used to meeting new people online, opportunities for social interaction are highly valued too.



# 4.4 Meeting the needs of multiple generations of LGBT travellers

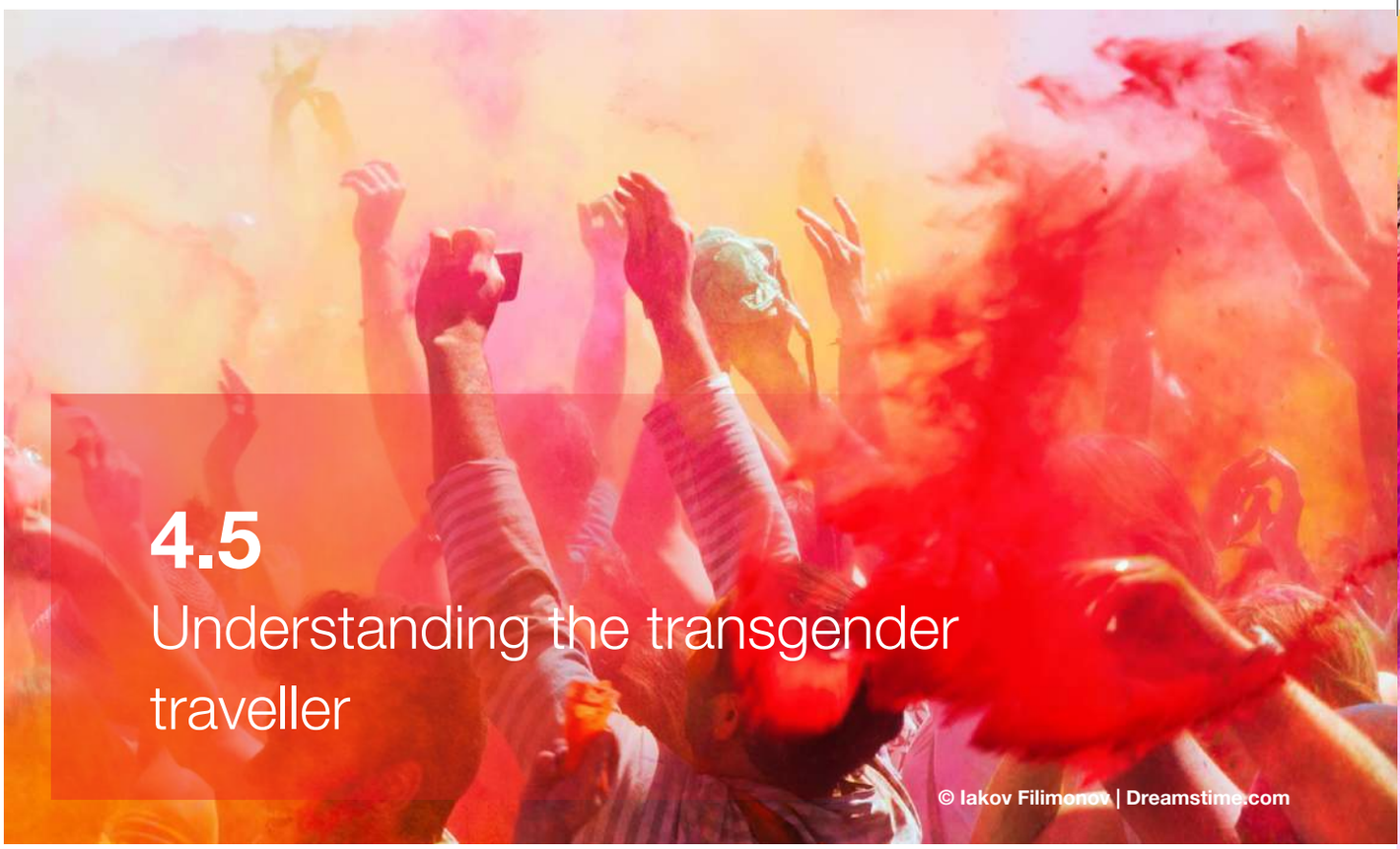
Alongside the right to have relationships formally recognized through law, over the past decade LGBT people have also won equal rights in the parenting and adoption of children. LGBT people can become parents through various means including current or former relationships, co-parenting, adoption, foster care, donor insemination, and surrogacy. A gay man, a lesbian, or a transgender person who transitions later in life may have children within an opposite-sex relationship, such as a mixed-orientation marriage, for various reasons.[76]

According to the Williams Institute study conducted in 2013, an estimated 37% of LGBT-identified adults have raised a child at some time in their lives while an estimated 3 million LGBT Americans have had a child and as many as 6 million children in the United States of America and adults have an LGBT parent. The Institute also reports that among those under age 50 who are living alone or with a spouse or partner, nearly half of LGBT women (48%) are raising a child under age 18 along with a fifth of LGBT men (20%).[77]

While LGBT people may form families with children conceived through former relationships, adoption is a common choice for same-sex couples who desire to raise children. According to ILGA, as of June 2016 joint adoption is available in 26 countries worldwide including Australia, Belgium, Canada, France, Netherlands, Spain, South Africa, Uruguay, the United Kingdom and the United States of America. Meanwhile, second parent adoption (where a child who is the biological child of one member of a couple is adopted through a joint petition by both members of the couple) is available in 33 countries worldwide.[78] It is notable that in the United Kingdom alone, during the ten-year period to 2016, there were 2,317 adoptions by same-sex couples.[79]

Compared to the products and services that have been tailored to the needs of solo LGBT travellers or couples, those developed for same-sex parents or grandparents travelling with children are not yet so widespread. A survey of LGBT adults in the United States of America conducted by CMI indicated that when LGBT parents take their children on vacation, 68% chose a destination that is child friendly, while 32% opt for a destination that is gay friendly. The same balance of criteria is used in choosing a hotel. As the same survey question was asked over three years, CMI has noted that LGBT parents have become even more dedicated to choosing child-friendly options since LGBT-friendly preference dropped 10% for destinations and 5% for hotels over this period (the survey also found that 56% of parents of children over age 18 were also grandparents, and 28% went on a vacation with their grandchildren in the past year).[80]

The increasing visibility and desire to travel among LGBT parents is something to which destinations and travel businesses should be alert. Research conducted in countries where same-sex marriage has been introduced suggests that there is a pent-up desire among same-sex couples to raise children, however many LGBT parents can find holiday planning and travelling an anxious time, as they worry about hostility from hotel staff or border officials, unused to serving same-sex couples with children. LGBT parents and their children often find it beneficial to travel with similar families as an opportunity to feel more at home, and exchange experiences.



# 4.5 Understanding the transgender traveller

© Iakov Filimonov | Dreamstime.com

The letter "T", standing for *transgender* in LGBT, is often overlooked and easily conflated with issues surrounding those who are lesbian, gay or bisexual. Even in countries with more advanced legislation on protecting the rights of *transgender* people, they are frequently misunderstood and frequently subject to discrimination. More broadly, through a combination of work by LGBT non-governmental organizations, public debate and the greater visibility of people who go through the process of gender reassignment, the word *transgender* has entered public lexicon in a way that it never had before. There has also been an increase in public awareness of what it means to be transgender, creating a greater sense of interest and empathy in the specific challenges that transgender people face. As one of the objects of publishing this report, IGLTA and the UNWTO Affiliate Members Programme wish to raise awareness of this, and help the tourism sector to understand what steps it can take to cater better to transgender travellers. (See pages 78-79)

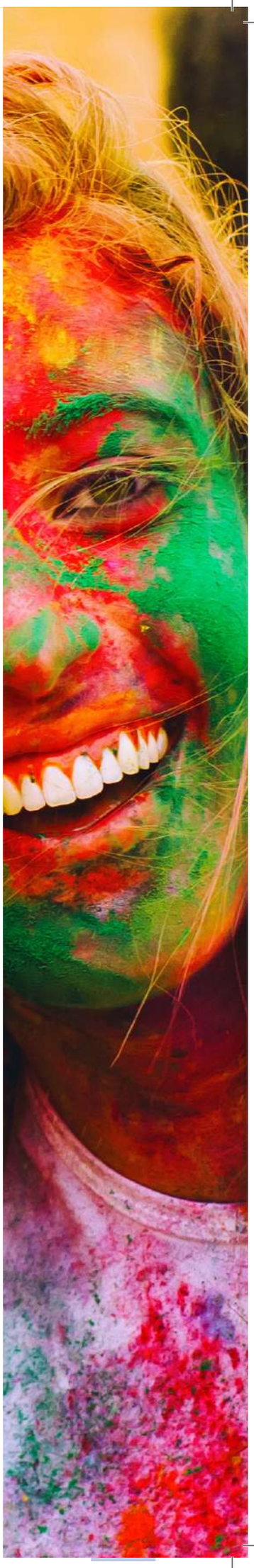
# TIPS FOR A RESPONSIBLE TRAVELLER

The Tips for a Responsible Traveller were developed by the **World Committee on Tourism Ethics** and are based on the **UNWTO Global Code of Ethics for Tourism**.

The UNWTO Global Code of Ethics for Tourism is a fundamental frame of reference for responsible and sustainable tourism.

Adopted in 1999 by the General Assembly of the World Tourism Organization (UNWTO) and acknowledged by the General Assembly of the United Nations two years later, this comprehensive set of principles is designed to guide key-players in tourism development and is addressed to governments, tourism companies, destinations, local communities and tourists alike.

Although not legally binding, the Code features a voluntary implementation mechanism through its recognition of the role of the World Committee on Tourism Ethics, the impartial body responsible for interpreting, applying and evaluating the provisions of the Code.



# Case study 8:

## Interview with Richard Gray, Managing Director, LGBTQ Market, Greater Fort Lauderdale Convention & Visitors Bureau (CVB)

In seeking to understand the approaches that could be taken by destination marketers towards the transgender travellers, we sought insights from Richard Gray, Managing Director for the LGBTQ Market of the Greater Fort Lauderdale Convention & Visitors Bureau (CVB) in the United States of America. Fort Lauderdale has been proactively targeting and welcoming the LGBTQ market since 1996 and the destination now welcomes 1.5 million LGBT travellers annually, spending USD 1.5 billion. Gray has also been awarded for his work in promoting tourism to the transgender traveller.

**Why did you decide to reach out to the transgender market?**

One day in the summer of 2013, I said to myself 'we say LGBT all the time but what is the "T"?' I know that it stands for *transgender*, but what is transgender? Like many lesbian and gay people I believed at that time that we are not informed or as educated as we should be, so I decided to educate myself. During my research I found many personal testimonies online, and discovered an event – the Southern Comfort Conference – which was being held every year in Atlanta, which we have succeeded in bringing to Fort Lauderdale.

During the following months I drew up a basic strategy on how and why we should market to the transgender community and hosted a roundtable of key local LGBT leaders, as well as activists and business specialists from around the country. Getting support from the local community as well as a better understanding of the transgender traveller through research was essential. We carried out the first national Transgender Travel Study (with 700 transgender respondents from 48 states) aiming to answer questions such as: How do they prefer to be referred to? How often do they travel? Do they stay in hotels? Where do they prefer to go? What are their concerns when travelling? How do they deal with air travel and intimate security checks? We needed this research to help build an authentic campaign.

Conversely, as an authentic destination that cares about our visitors, our marketing must reflect the diversity and inclusivity of Greater Fort Lauderdale.

**In practical terms, what actions have you carried out in terms of product development and marketing in order to attract transgender travellers?**

Firstly we created the only destination transgender campaign in the world: *Where Happy Meets Go Lucky*. The campaign features authentic images of transgender individuals with actual transitioned models – a ground-breaking move. By integrating these ads and images into our mainstream marketing, we hope to increase awareness for a market that has traditionally been forgotten or not accepted.

© Ddmitr | Dreamstime.com

Secondly, we added a transgender landing page putting the 'T' first, sunny.org/TLGB showing our respect and commitment to the community and providing information of interest to transgender travellers.

Furthermore, in January 2017 we were very excited to launch a new global marketing and advertising campaign featuring three transgender models, becoming the world's first destination to use transgender models in mainstream destination advertising. Greater Fort Lauderdale's campaign, which also features straight, gay and lesbian models, is directed at a largely millennial and younger mind-set audience to showcase the destination's image as an authentic, diverse and inclusive brand.

In terms of destination management activities, I have worked with my team to ensure that the campaign gets the support of our local LGBT and business communities. We will soon be offering sensitivity training as part of the Greater Fort Lauderdale CVB's SUNsational training for all hospitality employees to uphold a higher level of customer service for all visitors to the destination.

The results already seem to be paying off because we continue to see growth in the number of attendees and participants in the Southern Comfort Transgender Conference and the Trans Medical Summit hosted annually in Greater Fort Lauderdale, a product that we hope to grow in the future.

**What advice would you give to other destinations that are considering creating new products and marketing campaigns targeted towards transgender travellers?**

Authenticity is key. I have always believed that this is a market that can see through a campaign that is just meant to be a fad or another niche to drive visitors. Education is equally important because sensitivity, acceptance and safety are important to the transgender traveller. The existence of local legislation that protects transgender people is a major deciding factor in destination choice for transgender travellers, so it is critical to make sure that local government agencies are on board with the initiative.

There are complexities to this market segment but I believe we have created the right education and information tools and put in place the necessary steps – like education and training and the right imagery – to be successful.

*IGLTA and UNWTO would like to express their gratitude for the kind financial support provided by the Greater Fort Lauderdale Convention and Visitors Bureau towards the production of* **the Second Global Report on LGBT Tourism.**

# Chapter 5:
## Putting your destination on the LGBT traveller's map

## 5.1 Recommendations

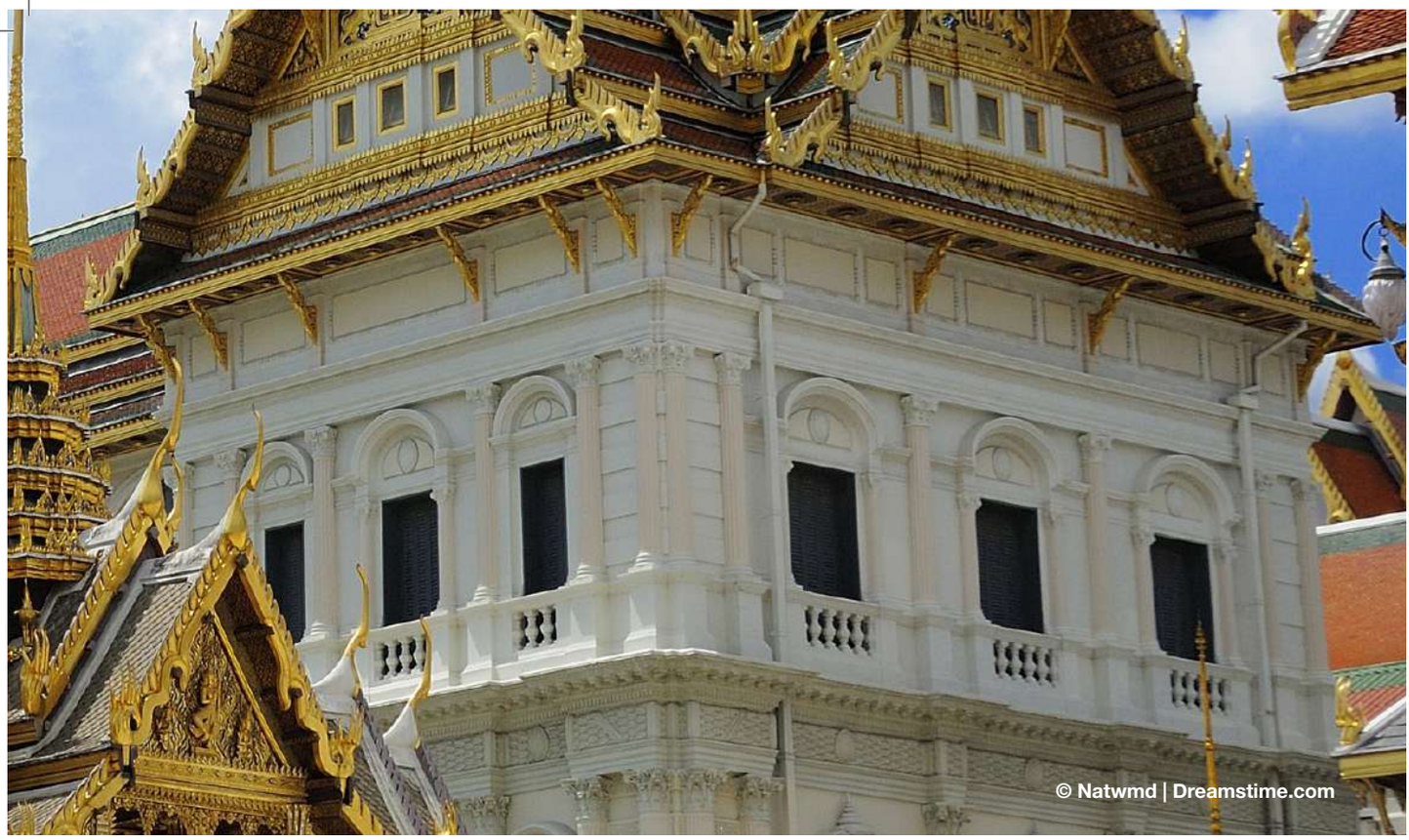
This report has examined the current state of LGBT tourism around the world, especially in light of the current state of LGBT rights, and the advancements that have been made towards securing equal rights for LGBT people in recent years. It has considered the impact of equal marriage on the tourism sector, and explored where some of the opportunities for product development and marketing lie in the coming years.

In spite of the flourishing diversity of products and destinations that now welcome LGBT visitors with open arms, the fact remains that both travelling and identifying oneself as LGBT is still a distant dream for many LGBT people around the world. Over the past decade, the United Nations itself has taken unprecedented steps to raise awareness of discrimination of LGBT people around the world (outlined in this report), but recognizes that there is still a long way to go. In September 2016, then United Nations Secretary-General, Ban Ki-Moon declared: "I will always fight for the equality of the LGBT members of our human family".[81] We must hope that the allies of LGBT people will join them in this fight long into the future.

### 5.1.1 Moving forward: Combatting discrimination based on sexual orientation and gender identity

In the words of former Secretary-General Ban Ki-moon, sexual orientation and gender identity are sensitive issues. Often, when discussed in the public realm, they are tied with issues of tolerance, morality and religious beliefs. Sometimes, in countries which are more culturally conservative or less accepting of equality for LGBT people, they may be targeted and abused for seeking special rights. However, the Office of the UN High Commissioner for Human Rights makes clear:

> *"Protecting LGBT people from violence and discrimination does not require the creation of a new set of LGBT-specific rights, nor does it require the establishment of new international human rights standards. The legal obligations of States to safeguard the human rights of LGBT people are well established in international human rights law on the basis of the Universal Declaration of Human Rights and subsequently agreed international human rights treaties. All people, irrespective of sex, sexual orientation or gender identity, are entitled to enjoy the protections provided for by international human rights law, including in respect of rights to life, security of person and privacy, the right to be free from torture, arbitrary arrest and detention, the right to be free from*




*discrimination and the right to freedom of expression, association and peaceful assembly."* [82]

### 5.1.2 Recommendations on LGBT rights and travel

Destination authorities should work with the widest range of government agencies to ensure the core legal obligations of States with respect to protecting the human rights of LGBT people, which are to:[83]

- Protect individuals from homophobic and transphobic violence;
- Prevent torture and cruel, inhuman and degrading treatment;
- Repeal laws criminalizing homosexuality and transgender people;
- Prohibit discrimination based on sexual orientation and gender identity; and
- Safeguard freedom of expression, association and peaceful assembly for all LGBT people.

Furthermore, where changes in the law are made, these should be supported with educational and sensitisation campaigns, and the proper training of law enforcement agencies. Above all, LGBT people should be able to travel to every destination and be treated with respect and without fear for their safety or dignity.

Those responsible for promoting and nurturing the LGBT segment should ensure that the development of this market meets the objectives of ensuring the long-term environmental, social and economic sustainability of their destination. As the present report has found, **great places to live make great places to visit**. This is especially true for destinations wishing to attract LGBT visitors.

LGBT travellers, like all travellers, should practice tourism as the UNWTO Global Code of Ethics recommends; "with a sufficiently open mind" and "in harmony with the attributes and traditions of the host regions and countries and in respect for their laws, practices and customs".[84]

# 5.2 Why should mature LGBT destinations continue to actively engage with the LGBT market?

During the period July–October 2016 destination marketing organizations (DMOs) that are members of the UNWTO Affiliate Members Programme and IGLTA were invited to complete an online survey on LGBT marketing. Over 70 national, regional and city tourism organizations from 22 countries and territories responded. The survey asked about LGBT marketing activities they have carried out, their understanding of existing LGBT visitors and what government authorities could do to boost visitation from this market segment. UNWTO and IGLTA would like to sincerely thank all organizations that took part.

## 5.2.1 Social attitudes may be changing, but LGBT tourism still matters

The LGBT traveller today is highly diverse, more visible and adventurous. Millennials of all sexual orientations and gender identities are – as consumers and travellers – behaving differently to generations that have gone before. They seem less bothered by labels and conforming to rigid stereotypes, and much more accepting of LGBT people in general, raising questions over whether the segregation of LGBT travellers that has occurred in some destinations will be necessary or even desirable in the future.

"Respecting the human rights of LGBT people will improve their lives tremendously, and we will all gain from their full inclusion in economic, social, and political life."[85]

Prof. M.V. Lee Badgett,
Professor of Economics and Director of the Center for Public Policy and Administration,
University of Massachusetts, Amherst.

A complete answer to this question is not yet clear, however, as long as LGBT people around the world continue to grow up feeling ***different***, and seek out others with the same sexual orientation or alternative gender identity, it is likely that LGBT tourism will continue to thrive.

In recent years technology has brought about profound changes in the way that consumers become inspired, plan and book their travel. It has also had a great influence on the visibility of LGBT people; changes in social attitudes towards LGBT issues have enabled faster, more effective connections between LGBT people. Destinations and travel brands wishing to target the LGBT consumer will have to work constantly with this in mind, while offering a genuinely fulfilling destination experience.

### 5.2.2 All stakeholders can play a part in improving the quality of life for local LGBT citizens

Even in countries with legal frameworks that advance equality for LGBT people – *mature* LGBT destinations – daily life and the experience of growing up with a different sexual orientation or gender identity to one's peers can still be difficult. LGBT people therefore rely on their governments, their employers, the media, their friends and family for support and protection against discrimination.

Testimony from destinations and multinational businesses in this report show that consistent, transparent and authentic support for LGBT equality among their stakeholders around the world leads to positive brand association and matters deeply in a world where consumers care more and more about the ethics behind what they buy. Social media has helped to make consumers aware of bad practice in corporate-social responsibility, and has also helped to make consumers aware of when business is doing well, going above and beyond local laws to defend equal rights for their LGBT employees and customers.

Many businesses operating in the tourism sector have already set an example by becoming global champions for LGBT inclusion and diversity among their customers and employees. The reasoning for this was simply explained by Apoorva N. Gandhi, Vice President for Multicultural Affairs for Marriott International in a recent interview with the New York Times: "If you take great care of your associates, they will take great care of your customers." [86]

Public and private sector organizations operating in the tourism sector should recognize the role they play in providing a place of work where employees are treated with respect and dignity, and in an equal manner. Such policies provide the key to promoting creativity and communication and boosting competitiveness. They also set an example for other business in the sector to follow.

### 5.2.3 Encourage inclusion and diversity in the workplace

As this report has explained (citing the work of Open for Business) the business world's concern for the rights of LGBT people is part of an overarching aspiration: that everybody is able to fully participate in business life – and in society more broadly – regardless of personal attributes such as gender, race, sexual orientation or gender identity. [87]

As an example of how to promote LGBT inclusion and diversity in the workplace, organizations may wish to refer to

the work of organizations such as Workplace Pride, a non-profit umbrella foundation that strives for greater acceptance of Lesbian, Gay, Bisexual, and Transgender people in the workplace and in society. Workplace Pride's Members include major multinationals, large domestic companies, public sector and non-governmental organizations, as well as academia. At the organization's 2011 conference, members made a declaration on workplace LGBT matters:

**The Workplace Pride Declaration of Amsterdam 'Call to Action':**

1. Employers must provide a safe, comfortable, equal opportunity workplace and promote authenticity for LGBT employees.

2. Employers should work closely with and benefit from the knowledge of other parties (employee networks and NGOs) dealing with LGBT workplace issues to achieve improvements.

3. Employers should identify and support leaders and decision-makers (LGBT and non-LGBT) that actively strive to create LGBT-inclusive working environments.

4. LGBT employees should actively strive to be visible at work and collaborate with employers on diversity and inclusion, leading the way for all employees.

5. LGBT employees should guide their employers on measures to support this declaration's goals and implement best practices.

6. Employers and LGBT employees should create and support structures in the organization that ensure progress.

7. Employers should embed the Declaration's concepts in organizational principles, and include them explicitly in external communication such as Annual and Corporate Responsibility Reports.

8. Employers and employees should develop and establish measurements that identify the level and progress of LGBT inclusiveness within the organization and benchmark this externally.

9. Employers should dedicate a minimum of EUR 1 per employee in the organization to support LGBT programs and Employee Resource Groups.

10. Organizations should visibly support the improvement of working environments for their LGBT employees in all the countries where they are active.

Declaration of Amsterdam for an LGBT Inclusive Workplace
Workplace Pride, 1 July 2011
Available at: www.workplacepride.org

Just as businesses have recognized that they are most effective when enabling their employees to truly be themselves in the workplace, the best destinations for LGBT visitors are surely those where the rights of LGBT citizens are respected and true diversity (in all its forms) is celebrated. Conversely, destinations that are proud of their values in defending and promoting equal rights for LGBT people have used the theme of *diversity* as a powerful asset for showing that visitors from all backgrounds are welcome.

> *"Our qualitative research [in the United States of America] told us that our LGBT urban dwelling traveller, looking for a weekend city getaway, was looking for many of the same things our non LGBT traveller was looking for. They just needed to see themselves reflected in the experiences we were promoting. Furthermore, partnering and/or supporting your local LGBT community is important. If you are already perceived as an LGBT-friendly destination, positioning your brand may require you to move your messaging beyond*

*just being LGBT friendly. Celebrating diversity is where our LGBT message fits into our brand positioning architecture. Knowing how that fits within our integrated marketing strategy was an important shift for us."*

Heidi Wallace, Director, Global Marketing, Tourism Toronto

### 5.2.4 Success in nurturing LGBT tourism also comes through smart destination management

All destinations should keep in mind travellers' increasing willingness to shop local, support initiatives that have a positive impact on the local community, discover the local story of a destination and most importantly of all, get to know the people. These are all things that small businesses excel at. Engaging with small businesses in an authentic, meaningful way can reap effective results in LGBT market development as well.

As with investments in other market segments, product development and marketing for the LGBT market can attract investment from local businesses as long as it is justified through a better understanding of this consumer segment. DMOs can therefore take the lead in coordinating investment in research and training programmes with local partners.

In recent years, as consumers have sought more of their travel inspiration and advice from online platforms, the role of destination marketing organizations (DMOs) has shifted away from managing the marketing process more towards the facilitation of this process with local partners. They are also becoming required to engage more in aspects of destination management such as product development, setting up and managing partnerships, carrying out training and tackling specific problems in the destination. With this in mind, it is important to consider how the LGBT segment can help combat structural problems for the destination such as seasonality, overcrowding and resource management.

**Key recommendations:**

- **Nurture small businesses working in the LGBT market** through government initiatives and partnerships with larger players. When small LGBT-owned businesses or businesses directed toward the LGBT community are supported through training and development programmes, they can significantly enhance a destination's competitiveness.

- In order to justify further investments, **the impact of LGBT visitor spending should also be better recorded and explained, especially in terms of its impact on the visitor economy**, i.e., the number of jobs created, businesses supported and visitor dollars spent. Where local businesses (LGBT and non-LGBT-owned) benefit, those who authorise funding for further marketing should be aware of this.

- **DMOs and local partners should consider how engaging with the LGBT market can help to address structural challenges in the destination such as seasonality.** Some destinations have tried this approach, setting up LGBT events in low season and have found great success. For example, the Greater Miami Convention & Visitors Bureau (or CVB) launched its Aqua Girl women's charity event in May (out of the winter high season) and it is now a nearly 20-year-old success story, growing from local event to becoming a point of attraction to tourists from around the world. Other destinations have organized their Pride celebrations to be held in quieter times of the year, for example Pride Orlando in October and Curaçao Pride in September/ October (typically hurricane season).

- **The LGBT market can also be an effective source of travellers looking to engage in projects with a positive impact on destination's society and environment through 'voluntourism'**. Specialised operators catering to LGBT travellers include HE Travel, Zoom Vacations, Out Adventures and Brazil Ecojourneys.

### 5.2.5 Innovation in product development and the advancement of equal rights go hand-in-hand

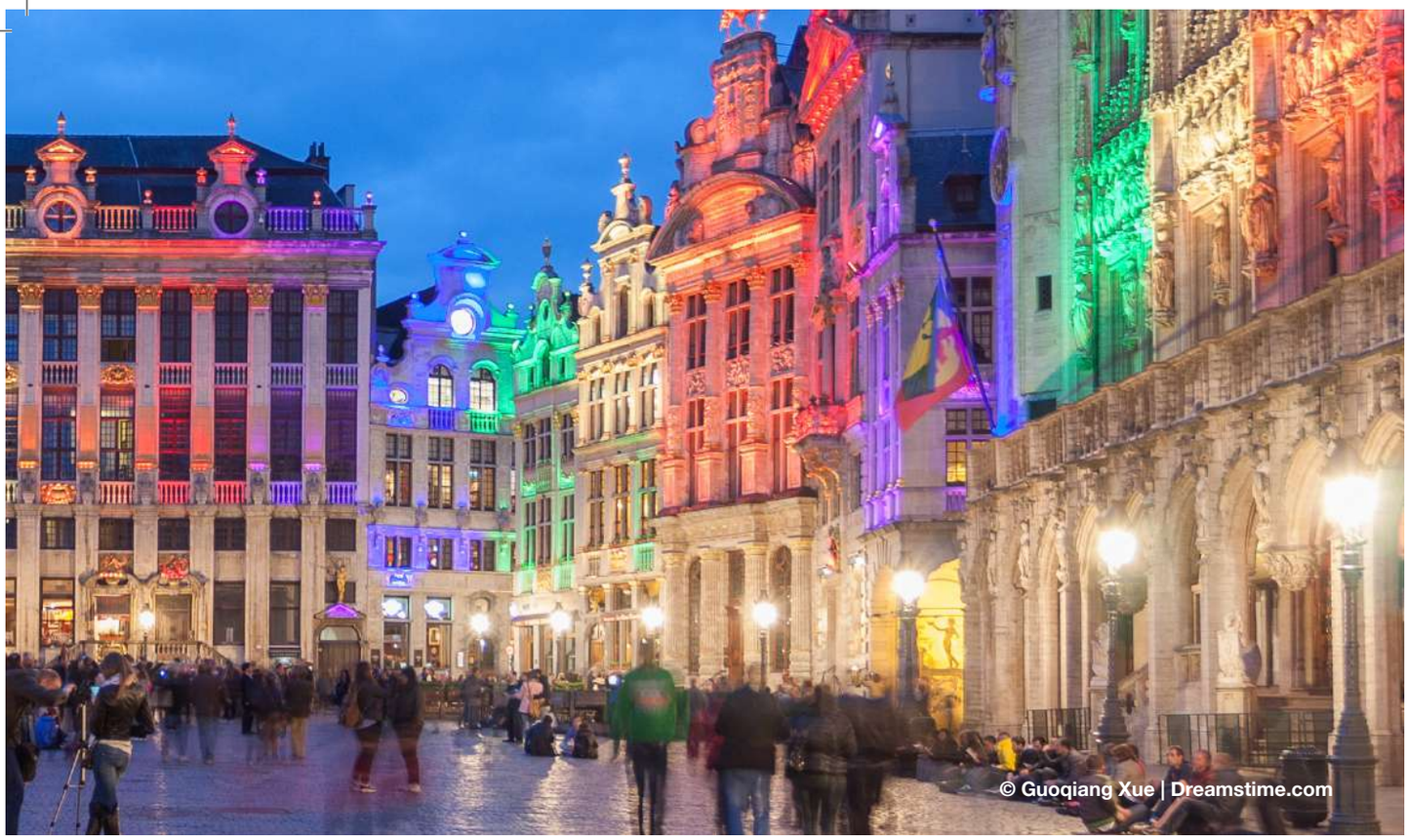
The concept that LGBT marketing is not just about having a gay pride event, or displaying a rainbow flag has become a mantra in the LGBT tourism industry, but what does it really mean?

As one destination authority told us, "you need to keep breaking new ground, and achieving firsts. Same-sex marriage is important, but it is not the only area of legislation that affects the lives of LGBT people. There are still many challenges to overcome and many good examples to set to the rest of the world".

There are destinations around the world which have a long history of attracting LGBT travellers, and their experience in guiding others in staying fresh and relevant to this market is useful. The survey for this report asked "What, in your opinion, are the features of your destination that most attract LGBT visitors?"

Their answers (collectively) were:

- The presence of legislation to ensure equal rights (particularly in marriage) and non-discrimination for LGBT people;
- A "warm and welcoming atmosphere", as well as an "open minded, non-judgmental and forward-thinking culture" among local people;
- A diverse local population, in every sense;
- A history of acceptance of LGBT people;




- Public figures (particularly political representatives) who are openly-LGBT themselves, or non-LGBT public figures who are prepared to speak out and take action in favour of equal rights for LGBT people;

- The presence of a local LGBT population, and neighbourhood(s) associated with it. Well-known examples include King's Cross in Sydney, Soho in London, Eixample in Barcelona, Chueca in Madrid, Le Marais in Paris, Schöneberg and Kreuzberg in Berlin, Chelsea and Greenwich Village in New York;

- LGBT-themed events, not just Pride but also LGBT events celebrating the arts such as film and literature festivals, or events celebrating ethnic diversity within the LGBT population such as True Colors in Amsterdam or the Gay8 Latino Festival in Miami;

- Appearances in films or TV programmes associated with LGBT life and culture. For example, the British TV series "Queer as Folk" brought Canal Street in Manchester to a global audience, while "Looking" re-explored the many faces of San Francisco; and

- Dedicated marketing activities by the destination's promotion organization and tourism-related businesses to stay front-of-mind for LGBT consumers (specific recommendations are provided below)

**Key recommendations:**

- Find the destination's competitive edge: Nurture some or all of the aspects outlined above through product development and integrated marketing campaigns.

- No two people are the same, and this is especially true of LGBT people. Each person is attracted to a destination for a different combination of reasons. Understanding the attraction means understanding the market, in order to bring out the destination's **competitive edge**.

- Work with local LGBT people (see section 5.3.3 on 'authenticity') in order to truly understand the true attractions and authentic character in any marketing campaign. Local and international travel influencers can also be an effective channel to tell that story.

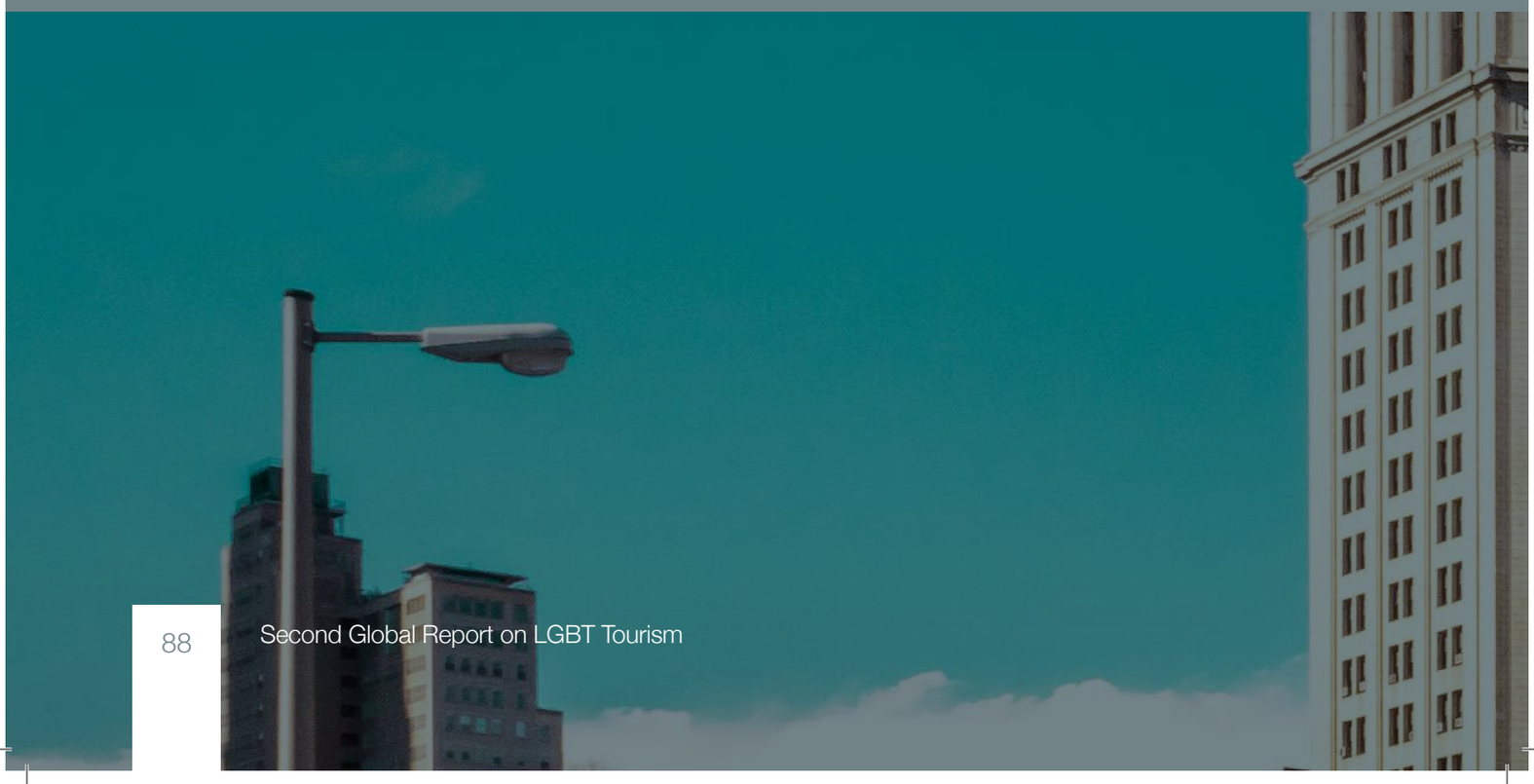
# Case study 9:

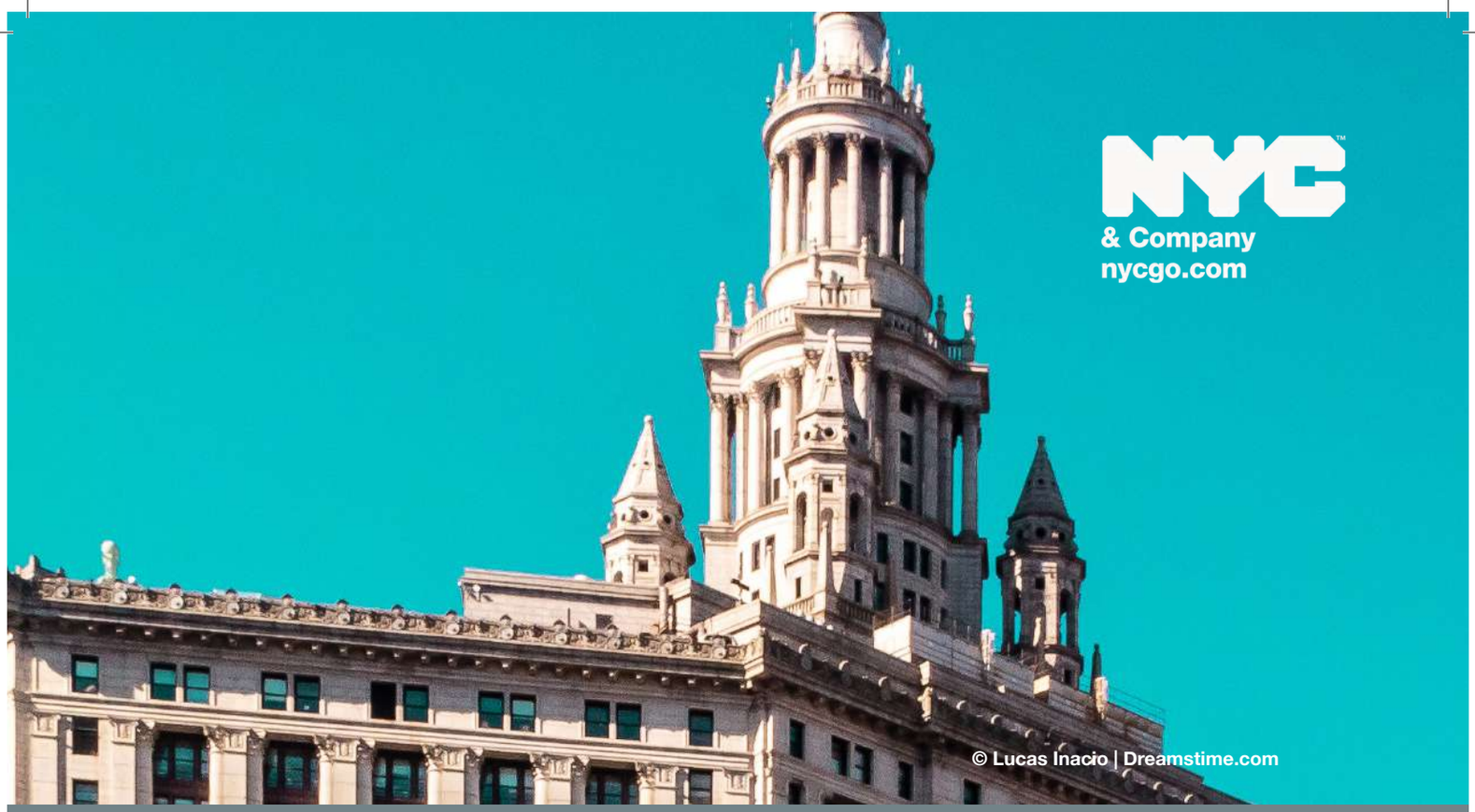
## NYC & Company's approach to LGBT destination marketing

By Fred Dixon, President and CEO, NYC & Company

When you are a Destination Marketing Organization (DMO), marketing begins at home. That is where we in New York City begin: with our history and our heritage. As our success with the LGBT community of travellers demonstrates, that heritage rests on the cultural values that have come down to modern New Yorkers since our Dutch beginnings in 1609 – **diversity, tolerance, acceptance, rights, openness, even struggle**. It is what defines us as a home to the community and a place for the community to visit.

Based on our research we know that LGBT tourism in New York City is a year-round combination of special events and everyday opportunities. From arts and culture to culinary adventures, from the National Stonewall Monument or the new AIDS Memorial to getting married in our beautiful City Wedding Chapel; there are as many reasons to visit New York City as there are LGBT visitors. Living and working or just visiting; staying in a hotel without embarrassment; dining out, going to the theatre, or concerts or clubs;

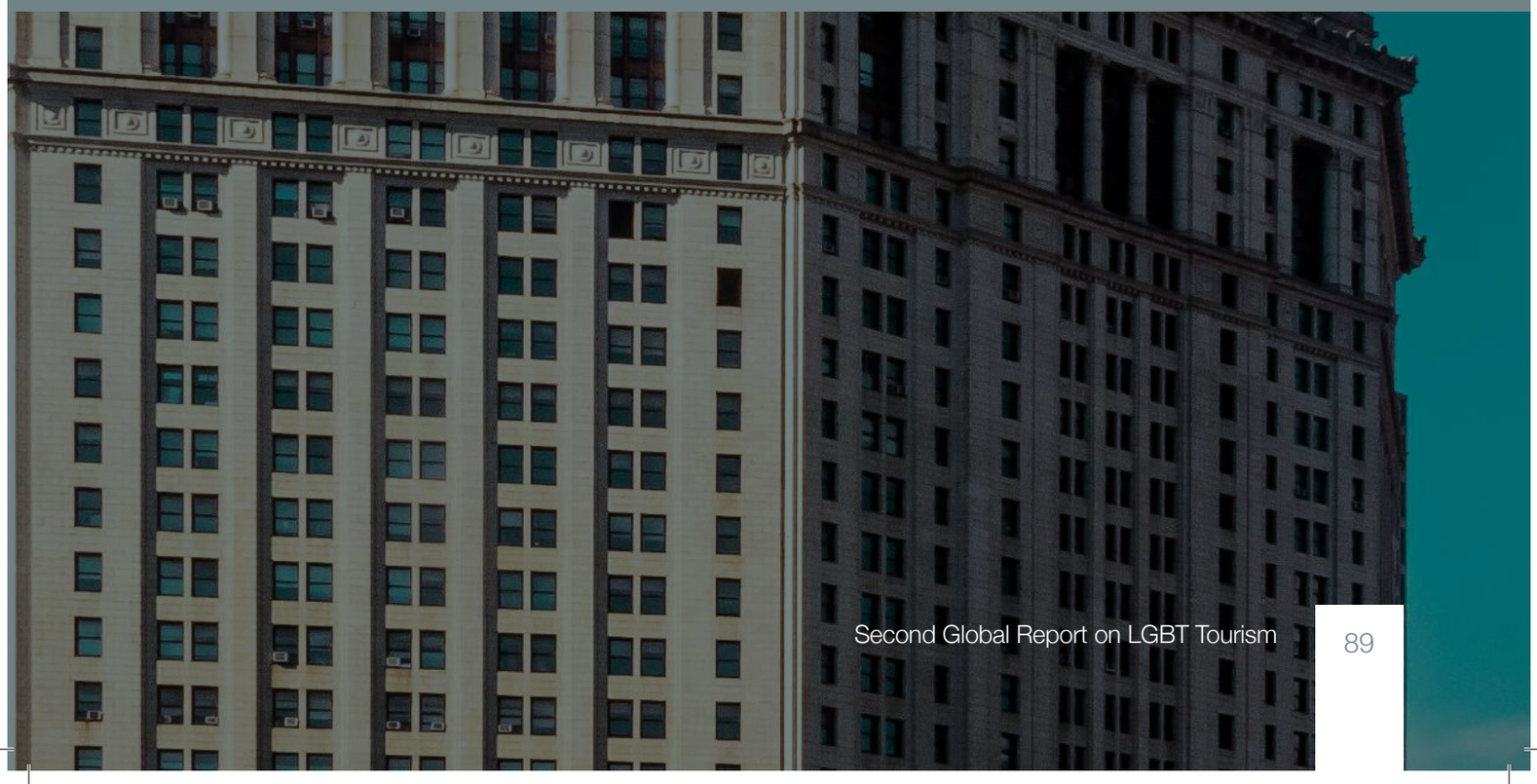





© Lucas Inacio | Dreamstime.com

spending time with friends; raising families; being politically active. We believe when we market the city as a visitor destination, it is this equality that is easily read and lived as gay friendly.

It is difficult to calculate exactly how many LGBT visitors come to NYC in a year, but conservative estimates put it at more than 7 million people. LGBT travel is good business for every city. In NYC, the annual economic impact rises to more than USD 7 billion for city businesses and organizations. As we celebrate the 50th Anniversary of Stonewall, we welcome all LGBT travellers to New York City.



# Case study 10:

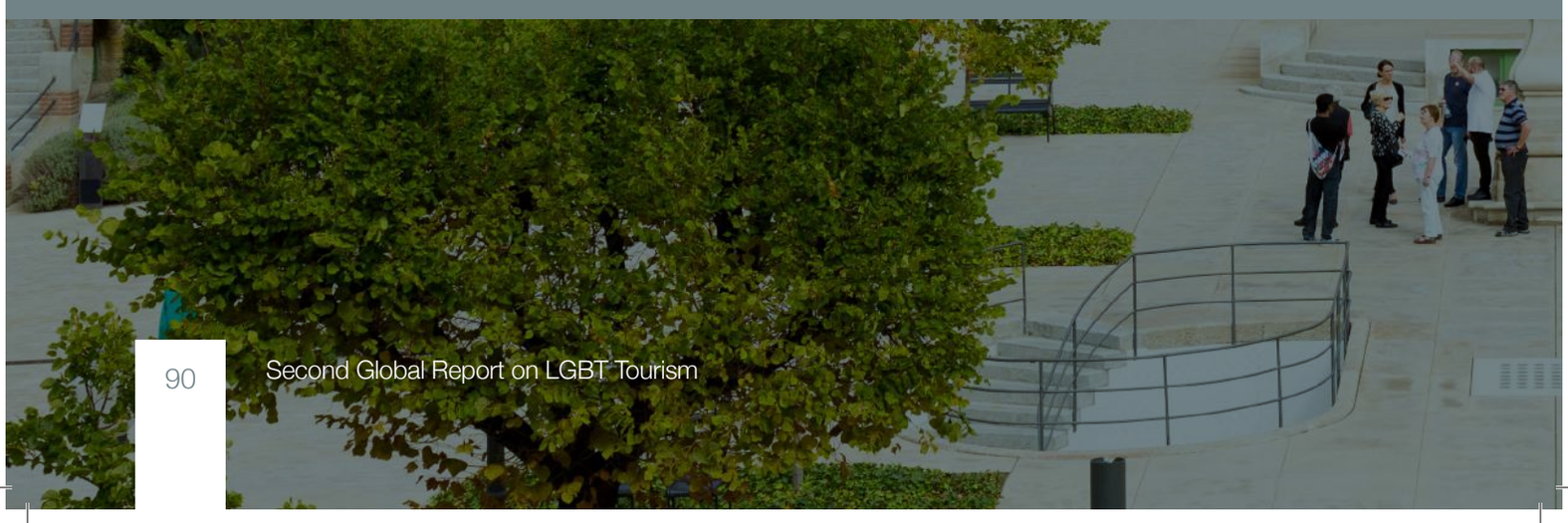
## Diversity: a part of Barcelona's DNA

By Turisme de Barcelona, International Promotion Department

The second capital of Spain, as Barcelona is often referred to, was the country's first capital when it came to the fight for LGBTI (lesbian, gay, bisexual, trans, and/or intersex) rights. La Rambla is not only famous as a tourist attraction but also as an iconic historical location since it was the scene of the country's first LGBTI demonstration back in 1977. Thanks to this and other struggles, Barcelona has become one of the most LGBTI-friendly cities in Europe and an essential spot in the LGBTI traveller's agenda.

A visitor arriving to Barcelona will notice that the LGBTI community is integrated in the city. Although 'Gayxample' is the neighbourhood where most LGBTI businesses are concentrated, gay parties and other hotspots are scattered all around and it is totally normal to find LGBTI and straight public hanging out in the same places. The fact that Barcelona's gay scene is integrated as a natural part of the city's day-to-day life is probably one of the reasons why Barcelona ranks among the top must-sees in destination lists. As in other countries, pioneering the promotion of equal rights has helped to position Spain as one of the most welcoming nations for the LGBTI community, with same-sex marriage and adoption laws passed in 2005 and used as reference by countries that followed. Laws promoting equal rights for transgender people and promoting non-discrimination laws have also been a determining factor in protecting the rights of all the community. This has of course attracted more LGBTI travellers to Spanish cities as they are seen as safe destinations to explore in peace and freedom.

The Catalan capital hosts two events of note: Pride Barcelona and Circuit Festival. The Pride Barcelona has remained homage to the fight for LGBTI rights since the first demonstration in 1977. As a result it keeps a genuine, local flair that nonetheless welcomes foreign visitors and offers

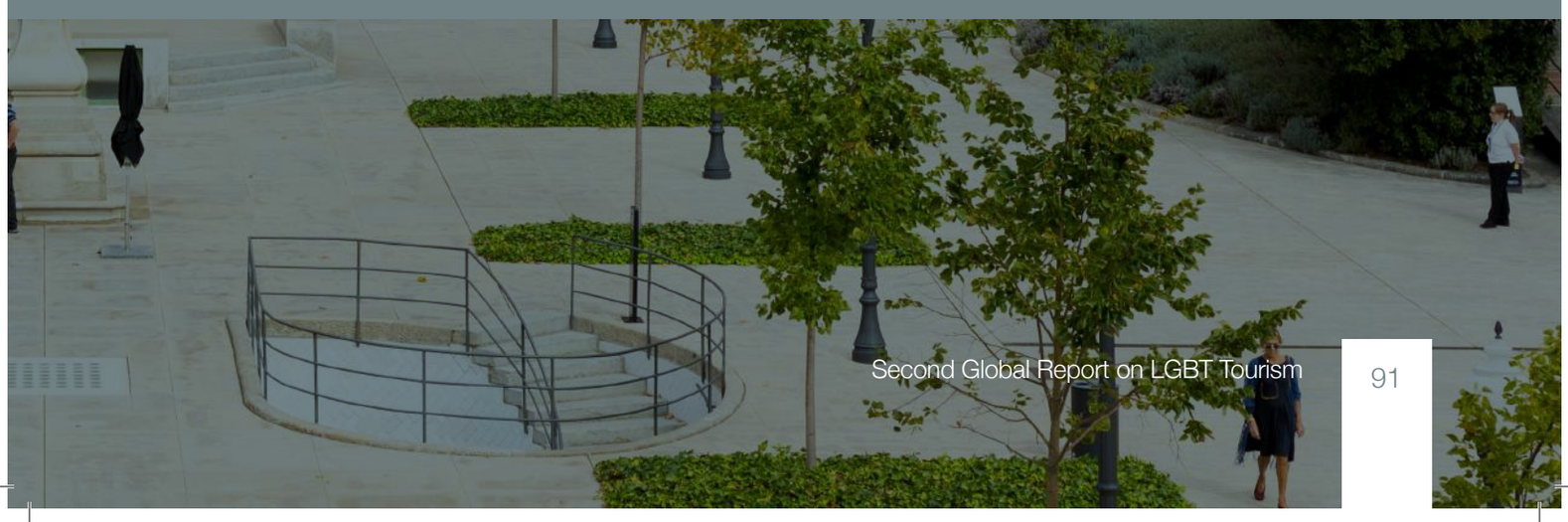


them the chance to mingle with LGBTI Barcelonans. On the other hand, the Circuit Festival stands as one of the hottest LGBTI events worldwide with more than a week of events. Other events such as the International Gay and Lesbian Film Festival in October and a plethora of exhibitions in first-class museums and venues round up Barcelona's LGBTI calendar and make it a valuable destination to visit anytime.

Aside from LGBTI clubs, bars, and businesses, Barcelona has a mixture of thriving culture, unique architectural heritage, exciting shopping areas with top designer brands and independent ateliers, a delicious gastronomic scene that is both traditional and avant-garde, and almost five kilometers of beaches with LGBTI and clothes-off zones. Essentially, Barcelona is one of the few destinations that are able to cover all the needs of the LGBTI traveller as an urban but at the same time beach destination ideal for long stays.

Beyond leisure tourism, Barcelona has gained popularity as a technology and innovation hub thanks to business tourism and leading congresses. LGBTI entrepreneurs have taken advantage of the city's reputation for mobile forwardness; they have changed and set a reference of new ways to socialize in a globalized, digital world.

According to recent research from tourism boards and public authorities, the LGBTI traveller has an appealing profile for its capacity to boost tourism revenues. With an average expenditure superior to other visitors, often highly educated and able to travel more frequently, this group is seen as an uncut diamond that everyone wants to attract. But destinations that want to attract more LGBTI travellers must be aware that a modern legislation on equality and rising awareness among local communities to accept and welcome freedom is vital to achieve this goal.



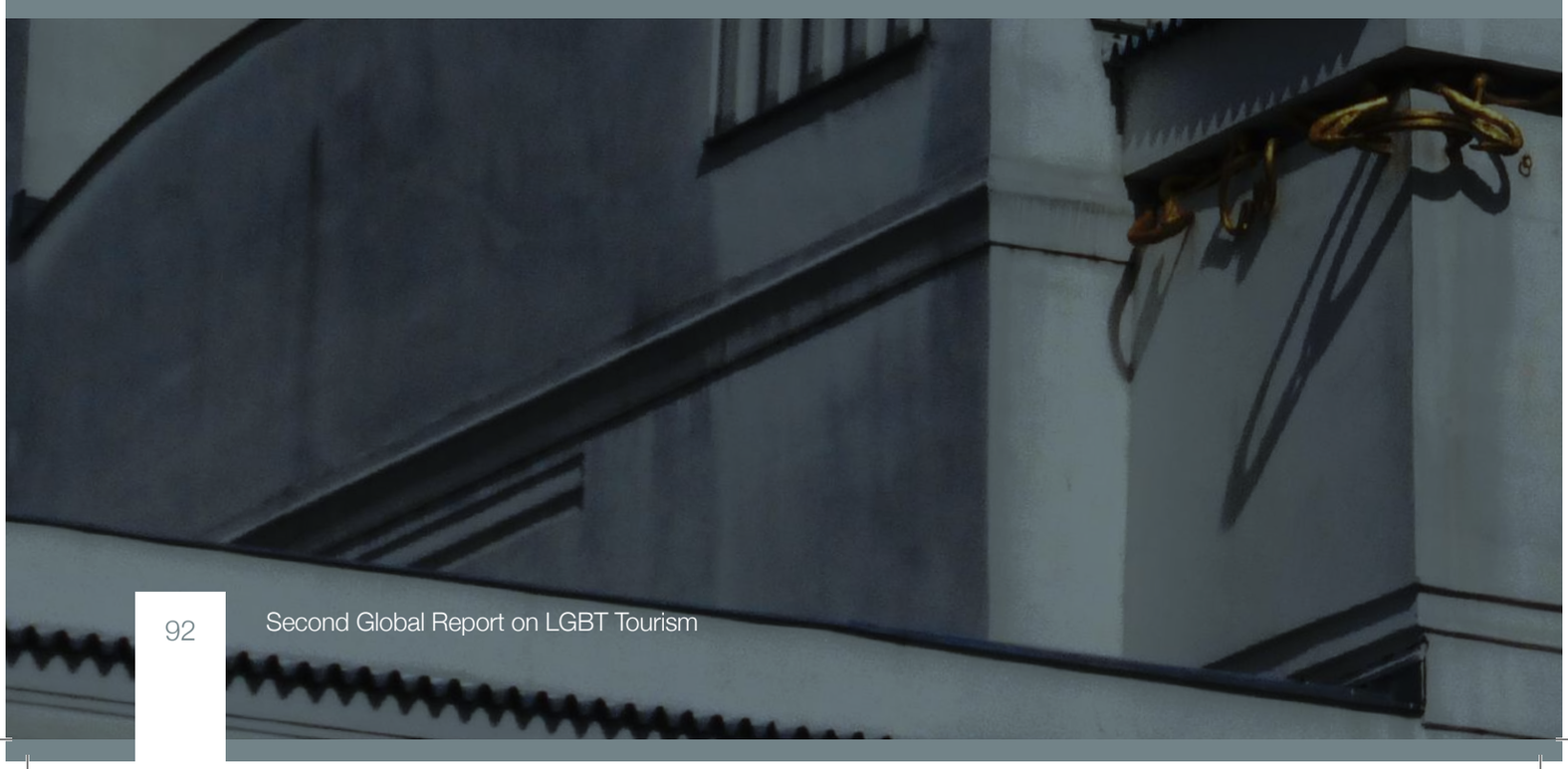
# Case study 11:

## A Snapshot of Vienna, an iconic destination for LGBT travellers

By Alexandra Rahbar
WFTGA – World Federation of Tourist Guide Associations

Not many European cities have such a rich gay history as the Austrian capital Vienna: gay emperors, generals or composers of days gone by and the entire city's LGBT population today convert Vienna into a unique travel destination. The city's impressive blend of historic splendor, culture, openness, lust for life and tolerance comes together to make Vienna a leading destination for gay and lesbian visitors. Over the past few years the Austrian capital has grown into its role as Central European hotspot for the gay and lesbian community, and the scene is flourishing. Among the events that attract LGBT visitors from around the world are: Vienna in Black, Life Ball, Diversity Ball, Vienna Boylesque Festival, Identities - Queer Film Festival and the Rainbow Parade.

Since 2010, gay and lesbian couples have had their partnerships legalized in Austria. Festive ceremonies are possible at top locations – from the Vienna Giant Ferris



Wheel to Schönbrunn Palace. Like for heterosexual couples, museums (e.g., the Albertina, Kunst Haus) or the former imperial residence Hofburg Imperial Palace are available for the ceremony or the celebratory presentation of the partnership document. Those who prefer simpler ceremonies can opt for a registry office.

This type of partnership registration is possible for all (adult) Austrians, as same-sex couples from abroad and it will be recognized in all countries where registered partnerships are allowed by law.

See: Gay & Lesbian Vienna online: www.vienna.info/gay

# Case study 12:

## Argentina World Friendly, The International Promotion of LGBT Tourism Products

By Pablo De Luca, President,
Cámara de Comercial Gay Lésbica Argentina, and
Pablo Singerman, CEO,
Camilo Makón , CEO,
Singerman & Makón  LATAM Tourism Consulting

**Appealing to diversity as a factor of success in destinations**

LGBT tourism has undoubtedly become a key segment that is capable of ensuring an increase in tourism revenues in different destinations worldwide. As a segment with promising potential, it necessitates social commitment as well as cooperation between the different sectors involved.

Consequently, several countries around the globe were leveraging synergies between the protection and preservation of diversity and the promotion of their respective tourist destinations. Argentina is certainly not an exception to this trend towards a fairer and more equitable world. For over ten years, the country has demonstrated a strong commitment to the LGBT community that has, in turn, placed Argentina as an international leader in the promotion of its territory as a hospitable and welcoming destination for the local and international LGBT community today.

**Commitment to equality and greater recognition of the LGBT Community: The route to tourism growth**

Over the last ten years, the Republic of Argentina has consistently shown commitment to the promotion of equality and recognition of the LGBT community through legal rights, respect for diversity, and job opportunities and inclusivity in the public and private sector. Laws and provisions ranging from the legalisation of same-sex marriage; the Gender Identity Law protecting gender identity in place of reassigning gender to transgender and other persons; positions in the public sector held by members of the LGBT community; to hiring quotas for trans people introduced by Buenos Aires, the first of its kind, which is currently being adopted by other districts in the country, have all gone to demonstrate the efforts made by the Republic of Argentina to uphold this social commitment.

These commitments have subsequently materialised into significant arrangements within the tourism sector. With joint efforts on behalf of the National Ministry of Tourism, the National Institute of Tourism Promotion (INPROTUR), and the Argentina Gay and Lesbian Chamber of Commerce (CCGLAR), different public awareness and training workshops were held for provincial public authorities and private tourism companies across the country in order to optimize the quality of their services, thus ensuring an excellent experience for national and international LGBT tourists in Argentina.

**International Promotion of LGBT Tourism Products**

Argentina promotes its destinations in an organic manner as well as on a national and integrated basis, with constant involvement by the public sector, represented by INPROTUR (The National Institute for Tourism Promotion), along with the private sector, represented by the Gay and Lesbian Chamber of Commerce, in different forums, fairs and international conventions that are both general and specific to the LGBT segment.

The range of experiences and tourist services specific to this segment involve distinct natural and cultural

© Galina Barskaya | Dreamstime.com

attractions, especially those arising from studies as the main motivations for tourists belonging to this segment, as well as the countless LGBT-friendly tourist establishments and facilities spread across the country. Argentina also hosts international LGBT events, such as Harvest for All (Mendoza), Gnetwork360: International Conference on Business and LGBT Tourism (Buenos Aires), various pride marches all over the country (the most important one being the annual November pride marches that take place in Buenos Aires, in terms of the number of participants), International Queer Tango Festival (Buenos Aires) and the National Day of the Sun LGBT Festival (San Juan).

In addition to this, Buenos Aires has gained international recognition as an LGBT mecca of Latin America. Every year, new destinations in Argentina are added to the international preference list offering a wide range of locations across the country that are LGBT-friendly, with different climates suitable for the development of various activities, especially those preferred by LGBT tourists. Those that are currently emerging as LGBT-friendly destinations are: Mendoza, Bariloche, Ushuaia, Puerto Madryn, Salta, Jujuy, El Calafate, Cordoba, Rosario, etc.

The initiatives and efforts put into promoting this segment are reflected in the results: 94% of LGBT tourists who visited the country rated their last tourist experience in Argentina as excellent (63%) or very good (31%), whereas practically none of the respondents rated the experience as below average or poor. The same report also identified that some LGBT tourists had the opportunity to enjoy other destinations during the same trip, among them were Uruguay (39%), Brazil (35%) and Chile (24%). Only 31% of the tourists visited Argentina exclusively.

Many activities that are popular among LGBT tourists in Argentina are associated with the tourist experiences in institutions that are primarily focused on the local and international gay community; namely participating in sports groups formed by gays and lesbians in the local community; visiting museums, crafts and design fairs, vintage markets and cultural centers, especially those that are of interest to the LGBT community; tasting typical argentine foods and drinks; visiting wineries or estancias; participating in electronic music festivals and popular parties such as Vintage for all (Gay), National Day of the Sun LGBT Festival etc.; shopping for apparel from local designers that are not easily available in other parts of the world, such as those exclusive of Argentinean shops; visiting the main natural attractions such as national parks and locations that are considered to be World Heritage Sites; participating in tournaments and sports competitions oriented towards the LGBT segment and as spectators for their preferred sports (e.g. polo); and to experiment with and explore LGBT oriented leisure and entertainment services that the destination can offer.

Argentina, without doubt, offers an array of customised services of superior quality for each segment of tourists, thereby expanding the scope for new and distinctive tourist experiences.

# 5.3 Where to start? Guidelines for travel brands and destinations that are making their first approach to the LGBT market

Based on the lessons learned in this report and the advice given by destinations which responded to the survey for this report, the following recommendations are given to destinations looking to understand and engage with the LGBT market:

- Encourage LGBT inclusion and diversity among all destination stakeholders;
- Carry out research and share it with your destination partners;
- Recognize that authenticity is essential; and
- Work in partnership with local business and the LGBT community.

## 5.3.1 Encourage LGBT inclusion and diversity among all destination stakeholders

**LGBT inclusion and diversity is good for business, good for local economies and good for tourism destinations**

As this report has explained – citing research from some of the world's most successful companies, when individuals can be themselves at work, companies thrive, economies thrive and individuals thrive. Therefore businesses that have adopted diversity and inclusion policies should redouble their efforts, and defend them when such issues are politicised and put into question by political groups.

Businesses that operate in the travel and tourism sector should recognize that promoting diversity and inclusion towards their stakeholders (employees, customers, investors, local people) is good for business and this should become an unassailable aspect of their agenda in corporate social responsibility. At a local community level, tourism businesses and destinations should consider the many things that they can do to support local LGBT people as well as visitors: support health initiatives, local clubs for LGBT youth and seniors, sports teams, music groups and other efforts that help improve the lives of local LGBT people.

## 5.3.2 Carry out research and share it with your destination partners

**Understand LGBT outbound markets**

As outlined above, LGBT people are highly diverse. It is essential to understand differences in travel motivations and behaviours between age groups, backgrounds, nationalities and more.

**Understand your destination's attractiveness as a LGBT destination.**

The cultural dynamics of each outbound market are also very diverse, changing the ways in which LGBT-related products and services are discussed, and the way your destination is perceived. An audit of current and potential visitor perceptions of your destinations can help to identify opportunities, and uncover previously overlooked attractions.

## 5.3.3. Recognize that authenticity is essential

Destination authorities and experts interviewed for this report consistently underlined the importance of authenticity in every aspect of LGBT marketing and product development. This is essential when showing off what the destination has to offer and reflected in the way that all of the destination authorities' own stakeholders are treated.

**Authenticity in working with the local LGBT community**

Do not just engage with your LGBT community for marketing purposes. It should be a two-way relationship, in which both can benefit. Continual communication is essential, and outcomes for the local LGBT community should be tangible. It does not make sense to spend money on tourism promotion while the rights of LGBT people are overlooked or abused, since consumers will call out this inconsistency in public. This report explains why LGBT inclusion and diversity among *all business* stakeholders is essential for the development of individuals, companies and the places they operate in. Ask: how can tourism businesses and visitor spend help address the specific challenges that local LGBT people face?

**Authenticity of messages and images**

Go beyond the stereotypes and show the diversity of LGBT real people and real life in your destination. Show how LGBT identity integrates with authentic everyday life as well as special events in the destination. Make sure to use actual LGBT people in your marketing campaigns.

**Authenticity means integration**

If LGBT people are visible and well integrated into daily life in your destination, then show it. Businesses around the world are changing perceptions by showing LGBT in real-life situations as part of their mainstream marketing campaigns and research has consistently shown that this is the brand position that LGBT people appreciate the most.

**Authenticity means consistency**

Authenticity in your approach towards the LGBT market starts with your own organization. How LGBT-friendly are the organization's human resources policies? What is the workplace environment like for LGBT employees? Do LGBT employees feel comfortable about openly identifying themselves as such?

**Authenticity in guest services**

Use dedicated training programmes to help your staff give same-sex couples an authentic welcome to accommodation establishments. Good examples include assigning beds as they have been booked (and checking this with sensitivity), providing same-sex welcome amenities (toiletries, robes, slippers), offering spa packages for same-sex couples among other measures.

**LGBT consumers should not be considered in isolation; allies are a key stakeholder group**

Promoting inclusion and diversity is not just significant for LGBT people. As visibility increases and people discover that colleagues, friends, family members are LGBT, the way that they are treated becomes more important to those who care, *i.e. allies*. These allies are also sensitive to the messages given

in the political and business sphere. These messages (both positive and negative) influence their consumer decisions, just like LGBT people.

### 5.3.4 Work in partnership with local business and the LGBT community

Forming partnerships are always important in tourism, however for LGBT marketing and product development to truly succeed, consistent three-way communication and consultation with local business and the LGBT community is vital.

Associations or chambers of commerce that promote knowledge exchange and business partnerships in LGBT tourism can prove highly valuable in developing business opportunities for this segment. In fact, various respondents to the survey for this report testified to the value that they had received from taking such an approach.

Tourism businesses need support in ensuring that they can extend an authentic welcome to LGBT travellers. Therefore, work with NGOs that support LGBT people, LGBT Chambers of Commerce and other platforms should be consistent and result in tangible benefits to all parties.

*"When government authorities and local businesses – particularly Certified LGBT Business Enterprises – collaborate to authentically engage the LGBT community the impact on the economy is tremendous – to the tune of [USD] 1.7 trillion dollars in the [United States of America]. That's why the National Gay and Lesbian Chamber of Commerce (NGLCC) is not just connecting public and private sector business leaders here in America, we're also helping open new LGBT chambers around the world that connect LGBT travellers, business owners, and those who respect and value them."*

Justin Nelson, Co-founder and President, NGLCC,
Insight provided for the present report

# 5.4 Quick tips for effective LGBT destination marketing

Destinations that responded to the survey for this report outlined the following actions that can prove to be effective in LGBT destination marketing:

**Direct marketing**

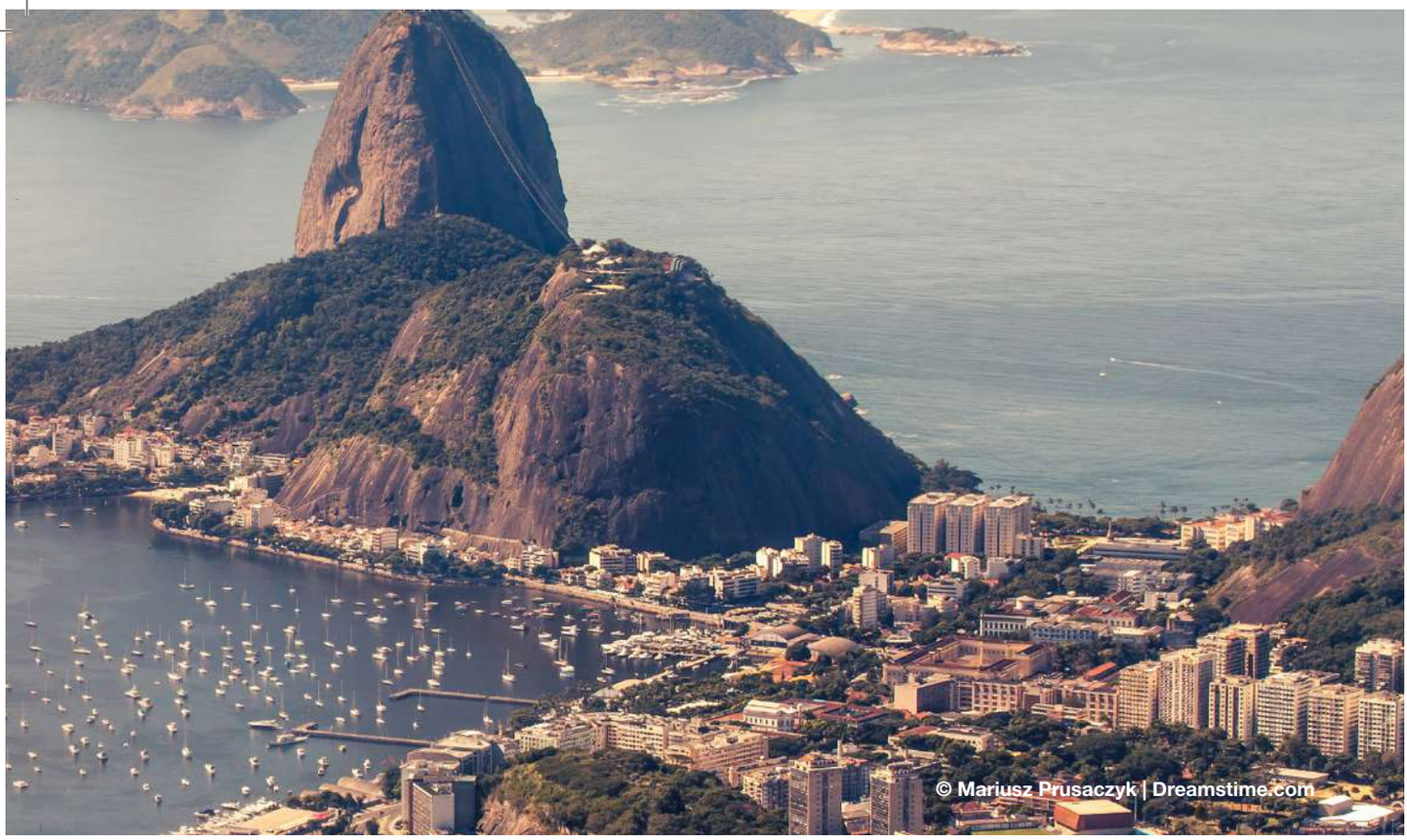
Participate in trade shows such as ITB Berlin, FITUR Madrid and the IGLTA Annual Global Convention in order to meet businesses and consumers interested in LGBT travel experiences. By selecting the right event in the right place, small businesses can get their message across to a diverse audience in a short amount of time through this channel.

**Improve your knowledge about the market**

Most trade shows and conventions offer educational seminars on subjects such as emerging markets, new technology and consumer trends affecting the LGBT market. DMOs can support their local partners by bringing LGBT travel experts and experience businesses to give workshops in their own destination.

**Dedicate proper human, as well as financial resources**

Create a position for a full-time LGBT marketing manager within the destination marketing organization who can become properly acquainted with the market in order to carry out well-informed marketing activities.




**Gain exposure at major LGBT events**

Promote directly to consumers through sponsorship and other partnerships opportunities with LGBT-themed events such as Pride, film festivals or LGBT sports events. Help to host or sponsor an established touring LGBT-themed event for the first time, to get on the map.

**Lend logistical support**

Destination authorities can greatly assist in the success of LGBT-themed events by giving logistical (event space, crowd management, security) as well as financial support to the smooth running of LGBT-themed events.

**Concentrate on quality**

Many organizations around the world operate LGBT training and certification schemes for local tourism businesses, ensuring that they can give a genuinely warm welcome to their LGBT guests.

# List of acronyms and abbreviations

| | |
|---|---|
| CVB | Convention and Visitors Bureau |
| DMO | Destination Marketing Organization |
| IGLTA | International Gay and Lesbian Travel Association |
| LGBT | Lesbian, Gay, Bisexual, Transgender |
| NGLCC | National Gay and Lesbian Chamber of Commerce (United States of America) |
| NGO | Non-governmental organization |
| OHCHR | (United Nations) Office for the High Commissioner for Human Rights |
| SOGI | Sexual orientation and gender identity |
| UN | United Nations |
| UNWTO | World Tourism Organization |

TRAVEL.
ENJOY.
RESPECT.
#TRAVELENJOYRESPECT

# References

1 IGLTA (2015) About IGLTA: LGBT Travellers are Welcome Here (online), available at www.iglta.org (25-03-2017)

2 United Nations Office for the Commissioner for Human Rights (1948), Universal Declaration of Human Rights, available at www.ohchr.org

3 'Ban calls for continued efforts to secure equal rights for LGBT community', UN News Centre (21.06.2016) (online), available at www.un.org (25-03-2017)

4 The Economist (2014) 'The Global Spread of Gay Rights', The Economist, (19-10-2014) available at www.economist.com (25-03-2017)

5 'Ban calls for continued efforts to secure equal rights for LGBT community', UN News Centre (21.06.2016) (online), available at www.un.org (25-03-2017)

6 United Nations Office of the High Commissioner for Human Rights (2015), Keynote address by Flavia Pansieri, United Nations Deputy High Commissioner for Human Rights, at the panel "Human Rights for All: Protection and promotion of the human rights of LGBT individuals – From local communities to global organizations", 20 November 2015 (online), available at: www.ohchr.org/EN/ (13-03-2017).

7 United Nations Office of the High Commissioner for Human Rights (2015), Keynote address by Flavia Pansieri, United Nations Deputy High Commissioner for Human Rights, at the panel "Human Rights for All: Protection and promotion of the human rights of LGBT individuals – From local communities to global organizations", 20 November 2015 (online), available at: www.ohchr.org/EN/ (13-03-2017)

8 United Nations Office of the High Commissioner for Human Rights (2015)

9 International Lesbian, Gay, Bisexual, Trans and Intersex Association – Europe (2015), Annual Review of the Human Rights Situation of Lesbian, Gay, Bisexual, Trans and Intersex People in Europe 2015, ILGA, Brussels, p. 14 (online), available at: www.ilga.org (13-03-2017)

10 Brocchetto, M. (2017), 'The Perplexing Narrative About Being Gay in Latin America', CNN, 26 February 2017 (online), available at: www.cnn.com (13-03-2017)

11 International Lesbian, Gay, Bisexual, Trans and Intersex Association – Europe (2015), pp.12 and 16

12 Cale, M. (2016) 40 Safety Tips for LGBT Travellers. Dopes on the Road, (01-11-2016) (online) available at: http://dopesontheroad.com/ (13-03-2017)

13 Virgin Holidays (2016) Lose the Labels! (online), available at: www.virginholidays.co.uk (25-03-2017)

14 UN News Centre (2013), UN unveils 'Free & Equal' campaign to promote lesbian, gay, bisexual, transgender rights, UN News Centre (online), (26-07-2013), available at: www.un.org (25-03-2017)

15 France 24 (2016), 'African states fail to stop work of UN gay rights investigator' France 24, (21-11-2016), available at: france24.com (25-03-2017)

16 Goldberg, M.L., (2016) 'For the first time, LGBT rights will be formally institutionalized into the human rights mechanisms of the United Nations' UN Dispatch (01-07-2016), available at: www.undispatch.com (25-03-2017)

17 UN News Centre (2016) 'UN's new LGBT rights expert urges global partnership to end violence and discrimination' UN News Centre (30-11-2016), available at: www.un.org (25-03-2017)

18 UN News Centre (2016) 'Ban calls for continued efforts to secure equal rights for LGBT community' UN News Centre (21-09-2016), available at: www.un.org (25-03-2017)

19 Permanent Mission of Chile to the United Nations (2016) Statement by H.E. President of the Republic of Chile at the High-Level Side Event '#Path2Equality' (21-06-2016), New York

20 BBC News (2016) 'Orlando Nightclub Shooting: How the Attack Unfolded' BBC News (15-06-2016) available at: www.bbc.com (25-03-2017)

21 World Tourism Organization (2016), 'UNWTO strongly condemns the attack in Orlando' (13-06-2016), (online), available at: www.unwto.org (25-03-2017)

22 Deloitte defined Millennials as being born in 1983 or later and who, for the purposes of the study were employed full-time

23 Deloitte (2016), The Deloitte Millennial Survey, Deloitte Touch Tohmatsu, London, p.9

24 Miller, J. & Parker, L. (2015) 'Open For Business, The economic and business case for global LGBT inclusion', Brunswick Group, p.6, available at www.open-for-business.org (25-03-2017)

25 Miller, J. and Parker, L. (2015), Open For Business: The economic and business case for global LGBT inclusion, Brunswick Group (25-03-2017)

[26] Europa Press (2017) 'Una veintena de empresas son reconocidas por su labor a favor de la inclusión laboral de personas con VIH', Europa Press (01-03-2017), available at: www.epsocial.es (25-03-2017)

[27] Propositions from: Miller, J. and Parker, L. (2015), Open for Business, The economic and business case for global LGBT inclusion, Brunswick Group, pp.30–55 (online), available at: www.open-for-business.org (23-03-2017)

[28] Miller, J. and Parker, L. (2015), Open for Business, The economic and business case for global LGBT inclusion, Brunswick Group, pp.30–55 (online), available at: www.open-for-business.org (23-03-2017). (p.44)

[29] Community Survey, US Overview Report, December 2015', Community Marketing, Inc., San Francisco

[30] Smith, A. and Anderson, M., (2016) '5 facts about online dating', Pew Research Centre (29-02-2016), available at: http://www.pewresearch.org/fact-tank/2016/02/29/5-facts-about-online-dating/ (25-03-2017)

[31] Green, J. (2016) 'LGBT Purchasing Power Near $1 Trillion Rivals Other Minorities', Bloomberg (20-07-2016) available at: www.bloomberg.com (25-03-2017)

[32] IGLA (2016), State-Sponsored Homophobia Report, 11th Edition, June 2016

[33] Prudential Financial Inc. (2012) 'The LGBT Financial Experience, 2012-2013' Prudential Research Study, Prudential Financial Inc, Newark, p.4

[34] Johns, M. (2014), 'The Big Business of LGBT Travel', Skift Report No.22, Skift, New York, p.11

[35] Community Marketing, Inc., (2016), '10th Annual LGBT Community Survey, US Overview Report, July 2016', Community Marketing, Inc., San Francisco, p.3

[36] Community Marketing Inc., (2016) ibid

[37] UNWTO (2017) Barometer of World Tourism, Vol.15 (January 2017), UNWTO, Madrid, p.1

[38] Halden, L. (2016) 'LGBT Travel' The Connected Visitor Economy Bulletin, Pacific Asia Travel Association, Bangkok, p.3

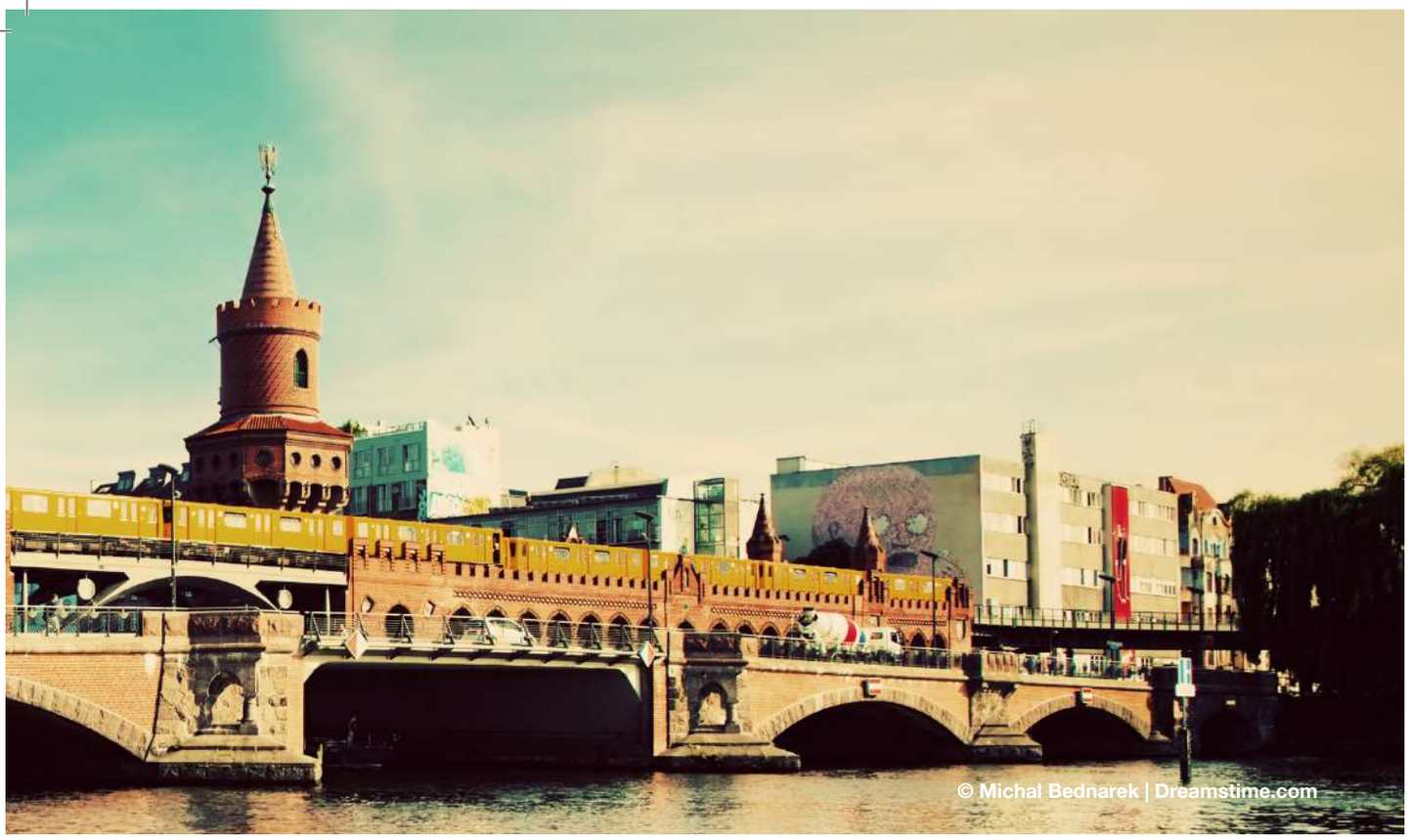
[39] Community Marketing Inc., (2016) ibid, p.15

[40] (Lave and Wenger 1991, Wenger 1998)

[41] (Wenger 1998)

[42] (Krasny and Tidball, 2009)

[43] (Brown and Duguid, 2001).




44 (Amin and Roberts, 2008),

45 (Wenger, 2011)

46 Bourque, A., (2016) 'Technology Profit and Pivots in the $300 Billion Wedding Space', Huffington Post, (01-05-2016), available at Huffingtonpost.com HYPERLINK "http://www.huffingtonpost.com/andre-bourque/technology-profit-and-piv_b_7193112.html" \h source

47 Community Marketing Inc., (2016) 'Same Sex Weddings in 2016: A Review of CMI Research One Year After the Landmark Rulings by the United States Supreme Court' Community Marketing & Insights, available at: www.cmi.info p.32

48 Badger, E., (2014) 'States that still haven't legalized same-sex marriage are missing out on a lot of money', Washington Post, (11-12-2014), available at: washingtonpost.com (25-03-2017)

49 Government Equalities Office, Department for Culture, Media and Sport (2013) 'Marriage (Same Sex Couples) Act 2013, Summary: Intervention and Options', available at: gov.uk (25-03-2017)

50 The Economic Impact of Marriage Equality in New York City

51 Please refer to case study provided by NYC&Company on The Economic Impact of Marriage Equality in New York City

52 World Tourism Organization (2012) Second Global Report on LGBT Tourism, AM Reports Volume 3, UNWTO, Madrid, p.12-17 available at: www.e-unwto.org

53 Peltier, D., (2015) 'Travel Brands Love that Same-Sex Marriage is Now Law of the Land' Skift (26-06-2015), available at: www.skift.com (25-03-2017)

54 Goldhill, O., (2014) 'How Gay Marriage Became a Marketing Tool', The Daily Telegraph (08-04-2014), available at: www.telegraph.co.uk (25-03-2017)

55 World Tourism Organization (2012) Second Global Report on LGBT Tourism, AM Reports Volume 3, UNWTO, Madrid, p.12-17 available at: www.e-unwto.org

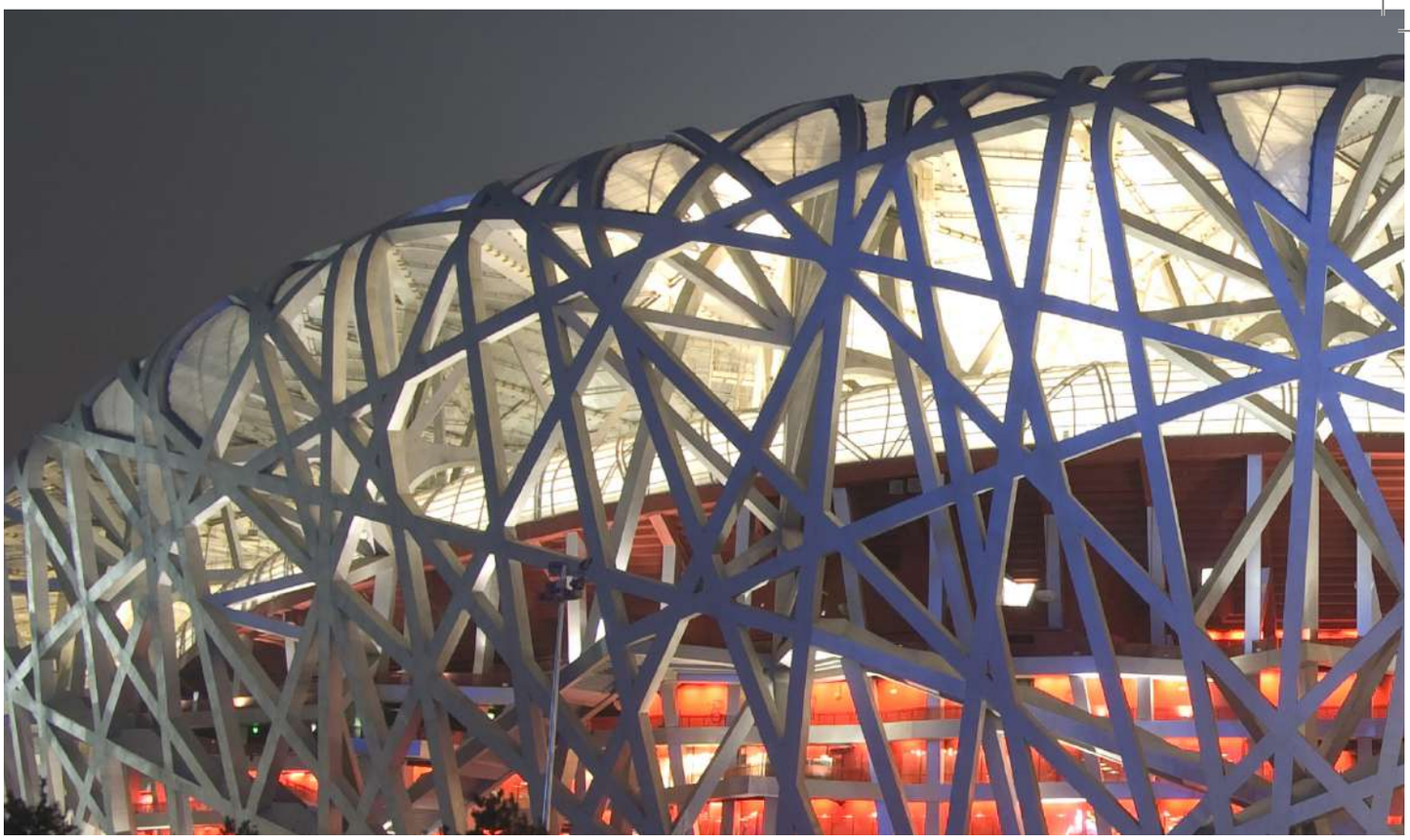
56 Community Marketing Inc., (2016) p.8, 14

57 Community Marketing Inc., (2016) p.12

58 Community Marketing Inc., (2016) p.27

59 Keren, D. J., (2012) The Economic Impact of Same-Sex Marriage in New York City: 2011-2012, NYC&Company, New York, p.3

60 Keren, D. J., (2012) The Economic Impact of Same-Sex Marriage in New York City: 2013-2014, NYC&Company, New York




61 Luongo, M., (2016) 'LGBT Travel: making places more welcoming by going there', San Francisco Chronicle (13-10-2016), (online) available at: www.sfchronicle.com (25-03-2017)

62 Foreman, D., (2016), This Pride Season, Marriott Invites You to Share and Artistic Expression of Love in Support of Transgender Lives, Marriott International News Center (12-05-2016), (online) available at news.marriott.com (25-03-2017)

63 Petenbrink, T., (2016) 'Virginia Launches New LGBT Tourism Marketing Efforts', Metro Weekly (24-09-2016), (online) available at metroweekly.com (25-03-2017)

64 Sigee, R,. (2016) 'Grindr is growing up: How the gay dating app became a major digital player' Evening Standard (11-02-2016), (online), available at: www.standard.co.uk (25-03-2017)

65 Travel Gay Asia (2016) 'Gay Dating Apps Survey 2016' Travel Gay Asia & Gay Star News, (online) available at: www.travelgayasia.com (25-03-2017)

66 United Nations Department of Economic and Social Affairs, Population Division (2015), World Population Prospects: The 2015 Revision, New York, available at: www.un.org/development/desa (25-03-2017)

67 Community Marketing Inc. (2014) Inaugural LGBT China Tourism & Hospitality Study, December 2014, Community Marketing San Francisco, p.4

68 Community Marketing Inc. (2014) Inaugural LGBT China Tourism & Hospitality Study, December 2014, Community Marketing San Francisco, p.5

69 BI Intelligence (2016) WeChat breaks 700 million monthly active users, Business Insider (20-04-2016), (online), available at: www.businessinsider.com (25-03-2017)

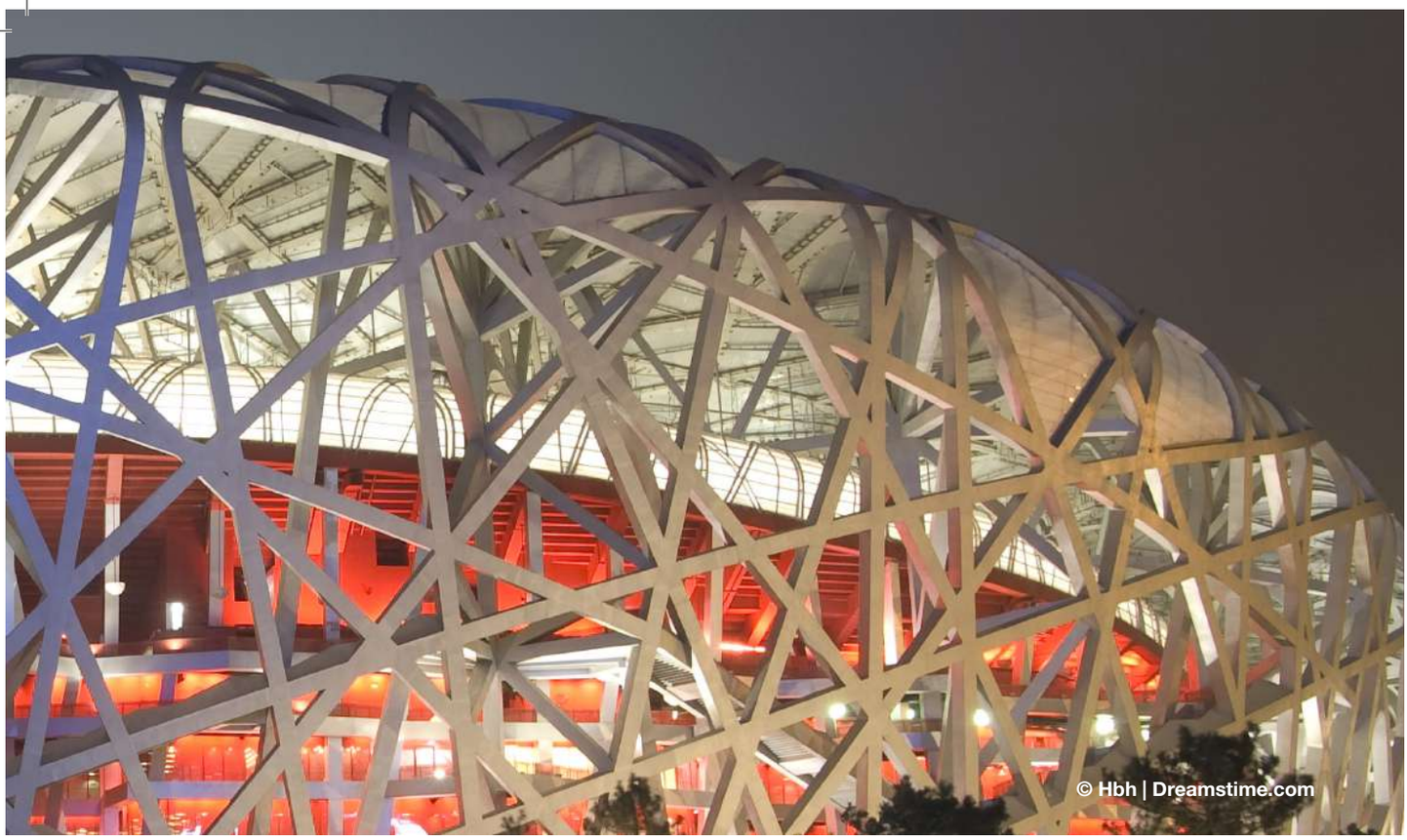
70 Global Blue Corporate (2016) 'Visa policies impact Chinese travel choices' (30-03-2016), (online), available at: www.corporate.globalblue.com (25-03-2017)

71 Morris, R., (2015) 'Gay Chinese Couples Marry in Los Angeles', BBC News (10-06-2015), available at: www.bbc.com (25-03-2017)

72 Jordan, P., (2014), 'How to define Millennials', Gen C Traveller, (online) available at: www.genctraveller.com (25-03-2017)

73 Jordan, P., (2014) 'Travel, Tourism and the Millennial Generation', Gen C Traveller, (online) available at: www.genctraveller.com (25-03-2017)

74 Pew Research Center (2013) The Global Divide on




Homosexuality, (posted 04-06-2013), (online) available at: pewglobal.org (25-03-2017)

75 Community Marketing, Inc., (2016), '21st Annual Survey on Tourism & Hospitality, US Overview Report, December 2016', Community Marketing, Inc., San Francisco, p.11-39.

76 Wikipedia (date not specified) LGBT Parenting: Forms of LGBT Parenting, (online) available at: www.wikipedia.org

77 Gates, G. J., (2013) 'LGBT Parenting in the United States', The Williams Institute, UCLA School of Law (02-2013) (online) available at: www.law.ucla.edu/williamsinstitute, p.1 (25-03-2017)

78 Carroll, A. & Sabbadini, R., (2016) 'Sexual Orientation Laws in the World: Recognition', ILGA, available at ilga.org (25-03-2017)

79 New Family Social (2016) 'Statistics: How many LGBT people are parents?', (online) available at: www.newfamilysocial.org.uk (25-03-2017)

80 Community Marketing, Inc., (2016), '21st Annual Survey on LGBT Tourism & Hospitality Community Survey, US Overview Report, December 2016', Community Marketing, Inc., San Francisco, p.33

81 UN News Centre (2016) 'Ban calls for continued efforts to secure equal rights for LGBT community' UN News Centre (21-09-2016), available at: www.un.org (25-03-2017)

82 UN-OHCHR (2016) 'Combatting discrimination based on sexual orientation and gender identity' (online), available at: www.ohchr.org

83 UN-OHCHR (2016) 'Combatting discrimination based on sexual orientation and gender identity' (online), available at: www.ohchr.org

84 UNWTO (1999) 'Global Code of Ethics for Tourism', UNWTO, Madrid p.4

85 Miller, J. & Parker, L. (2015) 'Open For Business, The economic and business case for global LGBT inclusion', Brunswick Group, p.6, available at www.open-for-business.org (25-03-2017), p.14

86 Mohn, T., (2017), 'How to plan a safe trip for gay and transgender travellers', New York Times, (30-01-2017), (online), available at: www.nytimes.com (25-03-2017)

87 Miller, J. & Parker, L. (2015) 'Open For Business, The economic and business case for global LGBT inclusion', Brunswick Group, p.6, available at www.open-for-business.org (25-03-2017), p.6

# IGLTA®

International Gay & Lesbian Travel Association

## The leading member-based global organization dedicated to LGBT tourism.

iglta.org/join

IGLTA Platinum Global Partners

DELTA AIR LINES

HILTON WORLDWIDE

MADRID 2017

IGLTA Gold Global Partners: Belmond | Hyatt | MGM Resorts International

## HELP MAKE THE WORLD MORE WELCOMING FOR ALL TRAVELERS.

IGLTA foundation

**THE INTERNATIONAL GAY & LESBIAN TRAVEL ASSOCIATION'S NONPROFIT FOUNDATION PROVIDES EDUCATIONAL OPPORTUNITIES FOR THE NEXT GENERATION OF LGBT TOURISM AND HOSPITALITY PROFESSIONALS. YOUR DONATION SUPPORTS STUDENTS AND SMALL BUSINESS OWNERS AROUND THE WORLD.**

### PAST SCHOLARSHIP RECIPIENTS

ENA YANAGI - JAPAN

CHARLIE WANG - CHINA

FABIO OVIEDO - COLOMBIA

iglta.org/foundation

**The World Tourism Organization**, a United Nations specialized agency, is the leading international organization with the decisive and central role in promoting the development of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 157 countries, 6 territories, 2 permanent observers and over 500 Affiliate Members.

**UNWTO Affiliate Members** bring together over 500 companies, educational & research institutions, destinations and NGOs whose activities are related to tourism and which contribute to UNWTO their knowledge and expertise to promote the development of tourism that's responsible, sustainable and accessible for everyone. Over 80 countries are represented among the Affiliate Members, the world's premier forum for exchanging tourism knowledge.


World Tourism Organization

Capitán Haya 42, 28020 Madrid, Spain
Tel: (34) 91 567 81 00 / Fax: (34) 91 571 37 33
www.unwto.org
unwtoam@unwto.org / http://affiliatemembers.unwto.org

2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT

UNWTO

Copyright © 2017, World Tourism Organization (UNWTO). All rights reserved.