ETC HANDBOOKS

HANDBOOK ON THE LESBIAN, GAY, BISEXUAL, TRANSGENDER AND QUEER (LGBTQ) TRAVEL SEGMENT

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A handbook produced for
the European Travel Commission (ETC)
by Peter Jordan, Gen C Traveller

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It should also be recognised that within this Handbook on the LGBTQ Travel Segment, while the data used were accurate at the time of compilation and printing, some changes due to revisions and/or changes in collection may have occurred since publication.

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FOREWORD

It is widely acknowledged that tourism remains one of the world's most dynamic economic sectors and an important driver of economic and social development. Europe remains the world's number 1 tourist destination worldwide and holds more than 50% of the share of worldwide tourism. In order to achieve the sustainable growth of the industry and ensure its future potential for European economies and employment, Europe must respond to the shifting patterns in global tourism and capitalise not only on the potential of tomorrow's outbound travel markets whose expanding middle classes are a growing market for European destinations, but also on increasingly important segments in both established and emerging markets, such as LGBTQ tourism.

Businesses in many corners of the world are increasingly responding to the shifts in demand from LGBTQ travellers and are responding to these changes by marketing their products and services adequately to the LGBTQ segment and providing more personalised products.

While we at ETC believe that a "separate" approach for the LGBTQ traveller could seem incongruous with our beliefs in equality and inclusion, we cannot ignore the fact that also within Europe, the hospitality business, like no other, has its work cut out to ensure that we remain committed to our core values of freedom, equality and brotherhood. Fostering support for LGBTQ inclusion also is an opportunity for economic growth and cultural development for tourism destinations. Destinations, governments are thus called to join efforts to create the conditions for LGBTQ residents to live in safety and comfort.

The aim of this handbook is to provide an introductory overview of the current state, the future evolution and potential opportunities of the LGBTQ travel market. This handbook's results encompass contextual quantitative and qualitative information on the characteristics, motivations, and travel patterns of travellers from this segment. The purpose of the report is to encourage Europe´s competitiveness as an LGBTQ-friendly destination and identify gaps where it is lagging behind other competing regions around the world.

ETC is pleased to publish this practical and useful tool, which contains a detailed analysis of the LGBTQ segment and will contribute to advancing knowledge on LGBTQ tourism in Europe, increase the region's attractiveness as a LGBTQ-friendly destination and yield the most from LGBTQ tourism offers.

Peter de Wilde

President

European Travel Commission (ETC)

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WELCOME

The International Gay & Lesbian Travel Association (IGLTA) is proud to take a leading role in the advancement of global LGBTQ travel, and we place great value on our collaborations with entities that are equally committed to creating a safe, welcoming environment for LGBTQ travellers. In May 2016, we signed an Organizational Partnership with the European Travel Commission (ETC) with the shared goal of strengthening promotion of LGBTQ tourism in Europe, and we are especially pleased to elevate our engagement this year with the release of this important Handbook.

When it comes to LGBTQ rights, most of us consider European countries to be among the world's most progressive; however, there remains room for improvement in both established LGBTQ-friendly destinations and in many European nations still striving for greater equality. This is why, through our philanthropic IGLTA Foundation, we gave our support to this project. By sharing data and resources on the LGBTQ segment with the travel industry as a whole we can create greater understanding of our diverse community.

The social and economic benefits for destinations that stand up for inclusion and equality far outweigh any negative repercussions. Destinations that treat their LGBTQ citizens with respect are more attractive for LGBTQ travellers, and they also have greater appeal for the friends, families and allies who love and support them.

We look forward to continuing our work with ETC to educate and encourage European destinations that wish to reach this dynamic segment of global travellers, and to bringing the IGLTA Annual Global Convention to Milan in May 2020. Thank you to ETC for its support of our association of LGBTQ-welcoming tourism businesses and our Foundation, and to all of the IGLTA members who contributed to this report. Together, we can help to erase the barriers of discrimination so that everyone feels free to explore all of the beauty, adventure and culture that the world has to offer.

John Tanzella

President/CEO

International Gay & Lesbian Travel Association (IGLTA)

IGLTA® Foundation

In Memoriam, Paulien de Groot (1974-2018)

This handbook is presented in memory of Paulien de Groot. Originally from Bonheiden, Belgium, Paulien participated in an educational forum on LGBTQ tourism organised by the European Travel Commission and VisitFlanders in Brussels in June 2018. During the forum she spoke of the challenges that she faced in daily life as a transgender woman, and when travelling. Sadly, Paulien took her own life in July 2018, shortly before this Handbook was published. With great sadness, but also with hope that her words will help others, we recall a powerful statement that she made when participating in the forum:

> "It makes business sense to help visitors feel safe and welcome, and to treat them with respect."

EXECUTIVE SUMMARY

OVERVIEW AND TRENDS

- **Engaging with the LGBTQ segment is, in essence, about creating a safe and welcoming environment for LGBTQ travellers and communicating it with understanding and respect.**

- **Over the past five decades, the visibility and acceptance of LGBTQ people in society has gradually increased around the world.** This process has been accelerated by a range of factors including political pressure from civil society, the spread of social media and increased corporate advocacy.

- LGBTQ tourism in Europe has traditionally been associated with major cities and popular beach destinations in Western Europe, however **the trends analysis for this report indicates that rapid diversification is occurring as LGBTQ travellers seek to expand their destination choices.**

- **Currently, growth and diversification of tourism services in the LGBTQ segment is concentrated around three particular areas: events** (i.e. Pride and commercial festivals); same-sex weddings and celebrations, and; tours and activities.

- **Globally, demand in the LGBTQ segment is being shaped by factors such as: the generational shift in attitudes** towards LGBTQ acceptance among younger generations, **demand from emerging outbound markets**, and **the effect of social media in giving visibility to LGBTQ people** and their travel experiences and aiding better product personalisation

- **In the future, the concept of 'LGBTQ tourism' is likely to continue its shift away from specific destinations and activities,** towards a more diffuse concept of 'inclusive tourism' for all. However, **as long as LGBTQ citizens continue to experience discrimination in society, demand will continue among LGBTQ consumers for travel to destinations that can offer a safe and welcoming environment.**

UNDERSTANDING LGBTQ CONSUMERS

- **The considerable variation in visibility and social attitudes towards LGBTQ people from country to country poses a challenge to researchers in reaching LGBTQ individuals,** obtaining personal information and ensuring a balanced, representative sample of responses

- **The LGBTQ segment can be more accurately described as a 'segment of segments', or a 'segment of tribes'.** It should not be considered as one homogenous bloc.

- For these reasons, **this study used a variety of research methods (online surveys and in-depth interviews with specialists)** in order to carry out exploratory research on demand from LGBTQ consumers in five long-haul markets: Brazil, China, Japan, Russia and the United States.

CONSUMER RESEARCH HIGHLIGHTS

- **LGBTQ travellers in Europe's long-haul markets have a high affinity with Europe and a strong desire to visit in the near future.** 80% of survey respondents expected to visit Europe in the next three years, with 92% of those who had visited before expecting to make a repeat visit.

- **Europe is a popular destination for same-sex couples from Europe's key long-haul markets,** as it is viewed as ideal for romantic vacations, quality time together and cultural exploration.

- **LGBTQ events and festivals are high on travellers' wish-lists when visiting Europe,** as well as the opportunity to sample the nightlife. However, many travellers are also looking for a cultural experience, including visits to specific sites and monuments, as well as opportunities to socialise with local people and enjoy high-quality experiences.

- **When selecting a destination, LGBTQ travellers to Europe value an open-minded and forward-thinking culture, as well as a history of acceptance, and equal rights for LGBTQ people in the destination**. LGBTQ events and nightlife are also highly appreciated; however above all, safety and acceptance are most important.

- **Spain, Germany, the UK and the Netherlands are perceived by survey respondents as countries offering 'quality of life' to their citizens,** as well as 'the best overall LGBTQ vacation experience' and the 'best LGBTQ events and festivals'.

- **When destinations seek to appeal to LGBTQ visitors through marketing campaigns and activities,** LGBTQ consumers value: authenticity of the marketing message and images, and consistency between the marketing promise and in-destination experience.

EUROPE AND THE GLOBAL COMPETITION FOR THE LGBTQ SEGMENT

- **Globally, destinations with an interest in the LGBTQ segment can be categorised as 'mature' or 'emerging'.**

- **European countries face competition for LGBTQ travellers from a variety of emerging and mature destinations around the world.** Sometimes competitor destinations may be domestic (e.g. travellers from within the US visiting destinations within the US), or near-neighbours (e.g. travellers from Mainland China visiting Taiwan or Thailand.

- **Europe has a strong competitive position,** being viewed widely by LGBTQ consumers in its major long-haul markets as **"the most liberal, socially progressive destination".**

- **However, weaknesses prevail, as some parts of Europe are perceived to offer a less safe environment for their own LGBTQ citizens, and by extension, traveller**s.

- **To date, only a very small number of NTOs in Europe have made a concerted effort to engage with the LGBTQ segment.** Instead, destination development and promotion has mostly been carried out at regional or municipal level, by local DMOs.

- **Case studies presented in this report from around the world demonstrate that there are newcomers to the LGBTQ market,** and that they are making a serious commitment to investing in both the product experience and to promoting to the LGBTQ segment across a range of channels.

STRATEGIC RECOMMENDATIONS ON IMPROVING EUROPE'S COMPETITIVE POSITION IN THE LGBTQ SEGMENT

Recommendations include:

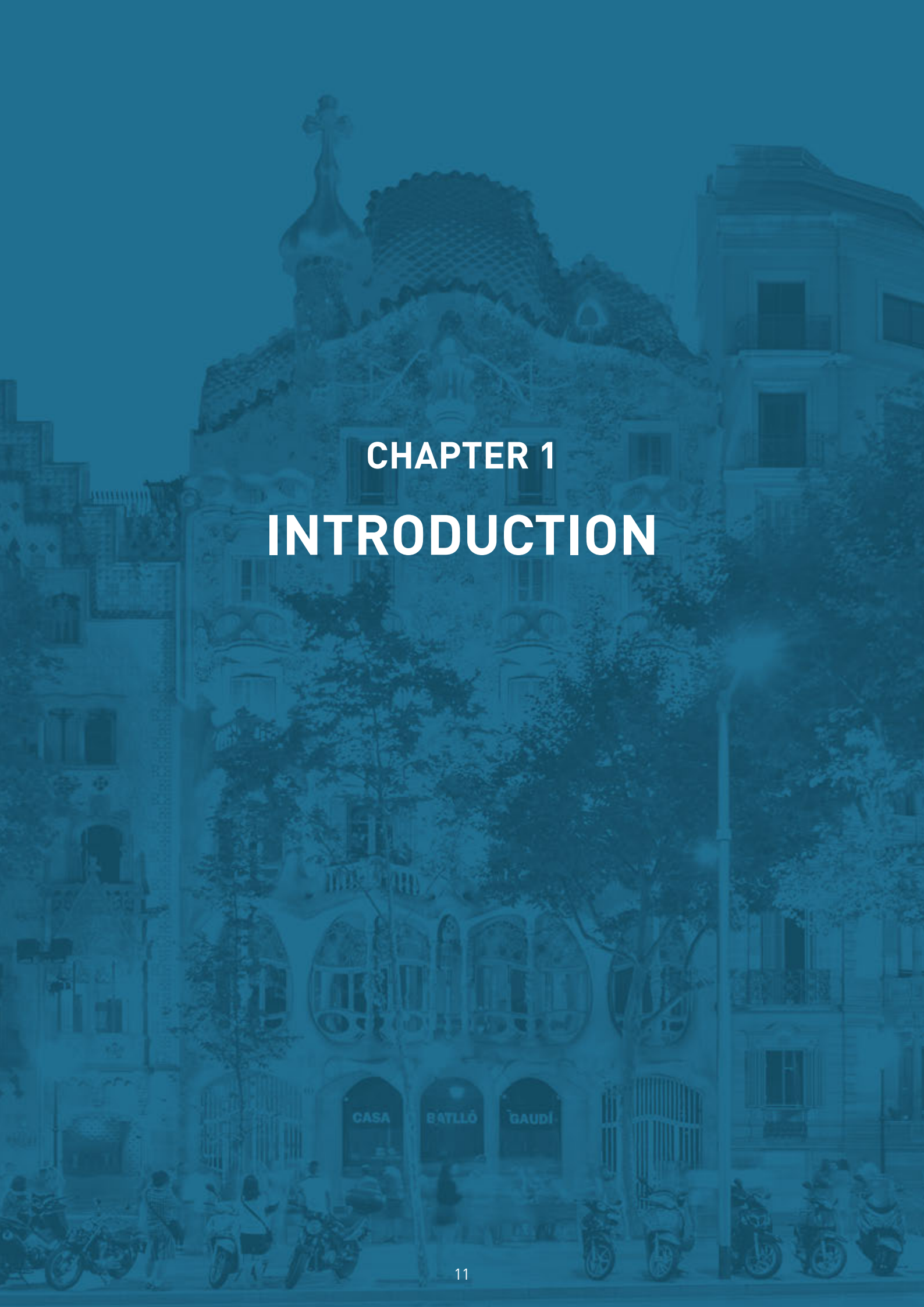
- **Spreading equal rights more evenly in Europe,** particularly those areas of law which currently discriminate against LGBTQ people.

- **Promoting LGBTQ inclusion and diversity in destinations,** in particular by ensuring LGBTQ people are given visibility and equal opportunities in the workplace, thereby enabling them to realise their full economic and creative potential.

- **'Preparing the ground' before carrying out marketing activities, by promoting education and knowledge-building on LGBTQ inclusion in destinations, and on working to build coalitions of interested tourism suppliers** to develop and package products for the LGBTQ segment.

- **Targeting the development of the LGBTQ market in destinations towards addressing structural issues** such as encouraging dispersal, reducing seasonality and supporting disadvantaged local residents.

- **Reflecting the true diversity of the LGBTQ segment to give visibility to under-represented groups,** as well as reflecting the diversity of travel experiences that are open to LGBTQ travellers.



CHAPTER 1

INTRODUCTION

1.1 BACKGROUND TO THIS HANDBOOK

This study has been commissioned with the aim of helping the members of the European Travel Commission (ETC) to understand the characteristics of the lesbian, gay, bisexual, transgender and queer (LGBTQ) market segment, and in particular the dynamics that influence the demand from this segment from five of Europe's major source markets: Brazil, China, Japan, Russia and the United States.

As this report will explain, over the past two decades, the global LGBTQ population has become more visible due to a variety of factors. As the visibility of this group increases, the considerable diversity of this group is becoming better understood, itself helping to drive the process of social acceptance. The increased visibility of LGBTQ people has also raised their profile as a consumer segment; a segment with particular interests, motivations and needs.

The tourism sector is one of the economic sectors which has led in engaging with the LGBTQ segment. This is no coincidence; tourism has long been regarded as one that is associated with openness, diversity and acceptance - even celebration - of differences between peoples around the world. However in recent years, as the acceptance of LGBTQ people in society has gathered pace, an increasingly diverse range of destinations, travel industry associations, and individual businesses have shown interest in the LGBTQ segment, and as a movement to be publicly supported.

> "Engaging with the LGBTQ market should be about creating a safe and welcoming environment for LGBTQ travellers, and communicating it with understanding and respect."

Whether driven by ideology, business interest or a mixture of both, engaging with the LGBTQ market should be about creating a safe and welcoming environment for LGBTQ travellers, and communicating it with understanding and respect. As the following chapters explain, as LGBTQ people have become more visible in society, so has the true diversity of this segment. The types of destinations and experiences sought by LGBTQ travellers are becoming more diverse all the time, creating an opportunity for Europe as a destination, but also global competition too.

Europe, a global leader with work still to do

According to the consumer research and interviews with experts carried out for this report, the pioneering role that many cities, regions and countries in Europe have played in advancing equal rights for LGBTQ people has helped to create a generally positive impression of Europe as a destination that is welcoming and friendly to LGBTQ travellers from Europe's major source markets. This impression, combined with the rich variety of cultural attractions offered across Europe provides a powerful proposition to potential LGBTQ visitors, and a clear competitive advantage for European destinations in this segment.

> "There is considerable competition from both established and emerging destinations seeking to attract LGBTQ travellers."

However, it is important to recognise from the start that while perceptions of Europe as a whole may be positive, there is considerable disparity with regard to the acceptance of LGBTQ people, their visibility in society and quality of life among the 35 states[1] considered for this study. There is a role for Europe's tourism sector in addressing this matter, and in doing so, improving lives and boosting Europe's competitive position towards this segment further still.

Global LGBTQ visibility is increasing, and with it, competition among destinations

While Europe's competitive position is generally good for this segment, there is considerable competition from both established and emerging destinations seeking to attract LGBTQ travellers. These destinations are capitalising on the fact that the internet has made research easier and LGBTQ acceptance is generally increasing within their own territory. Furthermore, LGBTQ travellers, like travellers globally, are becoming more adventurous. The greater visibility of different 'niches' within the LGBTQ segment has also created opportunities for destinations around the world to position themselves towards specific sub-segments. All of these factors should provide further impetus to European destinations to continually adapt and refresh their own product range and marketing approach to the LGBTQ segment.

1 The 35 States are comprised of the 32 national tourism organisation members of ETC, plus France, Sweden and the United Kingdom

1.2 REPORT OVERVIEW

Following the structure outlined below, this handbook introduces the LGBTQ market segment and investigates how Europe can build on its competitive position to become a more welcoming, inclusive destination for LGBTQ visitors from around the world.

- **Chapter 1 – Introduction:** Background to this report, definition of the LGBTQ segment, and discussion of its relevance to destinations
- **Chapter 2 - The state of LGBTQ tourism worldwide:** Definition of LGBTQ tourism, understanding its significance, situation analysis, current trends and expected evolution
- **Chapter 3 - The characteristics, motivations, and perceptions of LGBTQ travellers from Europe's long-haul source markets:** A full appraisal of the LGBTQ segment using insights gathered from primary consumer research and expert interviews
- **Chapter 4 - Success with the LGBTQ market:** Competitor destinations and case studies
- **Chapter 5 – Conclusions and strategic recommendations:** How to increase Europe's competitiveness in the LGBTQ segment

1.3 DEFINING LGBTQ TOURISM

According to IGLTA, 'LGBTQ tourism' refers to the development and marketing of tourism products and services to lesbian, gay, bisexual, transgender or queer people.

Within the global tourism marketplace, some products and services are designed specifically with LGBTQ 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 LGBTQ consumer that when visiting their destination or purchasing their product or service they will be welcome and respected.[2]

Providing an accurate picture of consumers who in many parts of the world are nearly invisible due to discrimination and persecution (even in supposedly accepting countries) poses obvious challenges to researchers wishing to analyse their characteristics in depth. Nevertheless, within these limitations, the author of this report has used a range of methods to create as balanced and accurate a picture of the LGBTQ segment as possible.

1.4 WHY THE LGBTQ SEGMENT?

There are a number of reasons why the European Travel Commission believes that the LGBTQ segment is worthy of particular attention by European destinations and tourism suppliers:

1. **Europe is perceived positively by LGBTQ consumers in its key source markets and is home to some of the world's most iconic destinations and events of special interest to this segment.** These factors place particular destinations in Europe in a strong competitive position in this market and provide a platform on which other destinations can build.

The 'Q' in LGBTQ

In using the acronym 'LGBTQ', this report takes guidance from IGLTA, which in May 2017 added 'Q' ('queer') to the long-used 'LGBT'.

For much of the 20th Century, the word 'queer' was known as a pejorative term, however in popular culture it has become reclaimed and restored, used by and for individuals who do not identify as 'straight' (heterosexual) or as having one defined gender, yet do not identify fully as gay, lesbian, bisexual or transgender.

2 UNWTO (2017) *Global Report on LGBT Tourism, Vol. 15*, UNWTO, Madrid, p.14

2. **Destinations welcoming LGBTQ visitors openly convey a powerful image of acceptance and respect.** According to UNWTO, destinations advocating LGBTQ rights consequently become significant global advocates of universal human rights. Doing so also helps to associate the tourism sector with open-minded and tolerant activities that embrace differences between peoples and cultures.[3]

3. **Destinations that treat their LGBTQ citizens with respect are not only attractive for LGBTQ travellers, but also to those who support them.** As LGBTQ visibility increases, the power of 'allies' (i.e. friends, family, colleagues) becomes more significant too.[4] This is important because consumers are increasingly alert to the values and practices of the businesses that they buy from, and the places that they visit. For example, according to a study released in June 2017 by Ogilvy, nearly half of Americans and 64% of those who identify as LGBT allies say they are more likely to spend money with brands that are LGBT inclusive.[5]

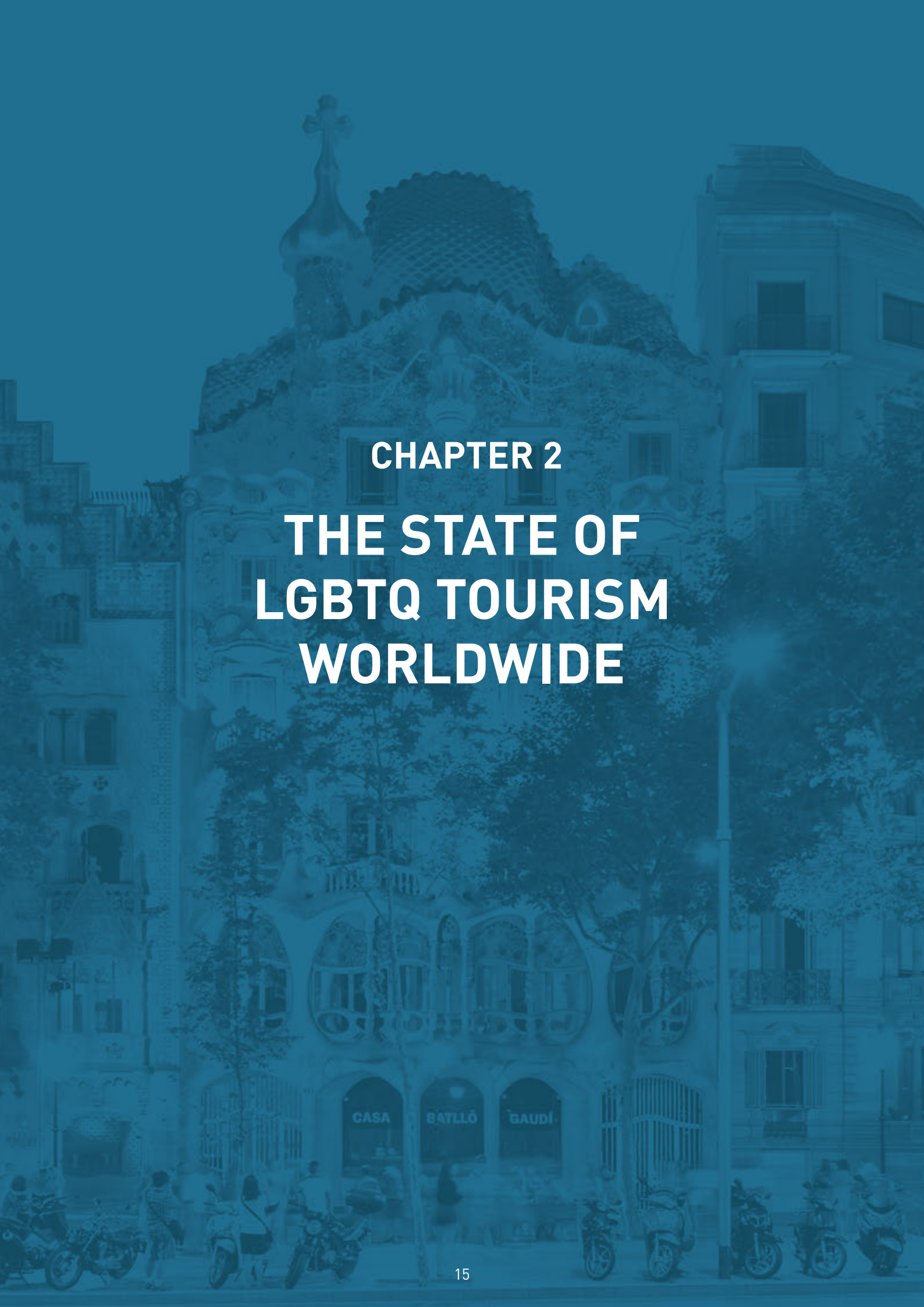
4. **There is an economic opportunity in improving LGBTQ inclusion and diversity in destinations.** This opportunity is often articulated in terms of improved brand perception. However, creating the conditions for LGBTQ residents to live in safety and comfort so that they can contribute their full selves to the economic and cultural life of a destination also represents a clear opportunity for the destination's own economic growth and cultural development.[6]

5. **Progress toward ensuring equal rights for LGBTQ people opens opportunities for the tourism sector.** Research has proven that when progress is made toward equal rights (for example, the introduction of same-sex marriage), destinations benefit from a boost to their brand, and increased arrivals and spending associated with wedding ceremonies, receptions and honeymoons.[7]

6. **The LGBTQ segment is highly diverse, and becoming more adventurous.** Research for this Handbook demonstrates that LGBTQ travellers in Europe's major long-haul markets are eager to visit Europe, in couples, alone or with friends. There are LGBTQ travellers with a range of budgets, who are attracted by a perceived offer of 'historic cultures combined with modern values'.

3 Ibid UNWTO 2017, p.8
4 Ibid UNWTO 2017, p.9
5 Fortune (2017) Being LGBT inclusive is good for business, survey finds (28-07-2018) available at: www.fortune.com
6 Ibid UNWTO 2017, p.38
7 Ibid UNWTO 2017, p.56

Casa Batlló, Barcelona © Casa Batlló



CHAPTER 2

THE STATE OF LGBTQ TOURISM WORLDWIDE

Over the past five decades, the development and marketing of tourism products and services to lesbian, gay, bisexual, transgender or queer people has undergone a steady evolution. As visibility, acceptance and equal rights have gradually spread around the world, so LGBTQ market activity has become more visible.

> "Even in more progressive countries, people who are, or are perceived as lesbian, gay, bisexual, transgender or intersex still suffer from social stigma and exclusion."

However, just as acceptance and equal rights are spread unevenly, so the emergence of LGBTQ outbound markets and destinations has been too. In at least 76 countries, discriminatory laws criminalise private, consensual same-sex relationships, exposing millions of individuals to the risk of arrest, prosecution and imprisonment – and even, in at least five countries, the death penalty.[8] Even in more progressive countries people who are, or are perceived as lesbian, gay, bisexual, transgender or intersex still suffer from social stigma and exclusion at home, at school, in healthcare institutions and many other aspects of their lives.[9] Nevertheless the direction of travel in the last two decades has been towards greater visibility, acceptance and equal rights enshrined in law. This process has helped LGBTQ people to live more openly, and thus to become recognised as an identifiable consumer segment.

2.1 THE ORIGINS OF LGBTQ TOURISM

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.[10]

Today's longest-established 'gay' destinations can trace their roots to major cities in North America and Europe whose liberal climate has since the 1960s attracted people of all sexual orientations and gender identities. Cities such as San Francisco, New York, Los Angeles, Miami Montreal, Toronto and Vancouver in North America became synonymous with the gay rights movement. The same effect took hold from an early stage in major European cities such as Amsterdam, Berlin, Barcelona, London and Paris. At the same time, beach-side communities such as Provincetown, Fort Lauderdale, Key West, and Long Beach in the US, and Sitges, Gran Canaria and Mykonos in Europe also started to attract sizeable year-round LGBTQ populations seeking a place to relax and socialise in an accepting environment.

Hotels, guest houses, restaurants and shops (often LGBTQ-owned themselves) set up to cater to this increasingly diverse and visible market, quickly finding that by providing goods and services without prejudice, customers would reciprocate with their trust and loyalty.[11] Small travel agents and tour operators also set up in these locations, arranging individual and group tours to other destinations, using suppliers that could ensure a safe and welcoming environment for their LGBTQ clients.

2.2 MAPPING THE LGBTQ MARKET SEGMENT

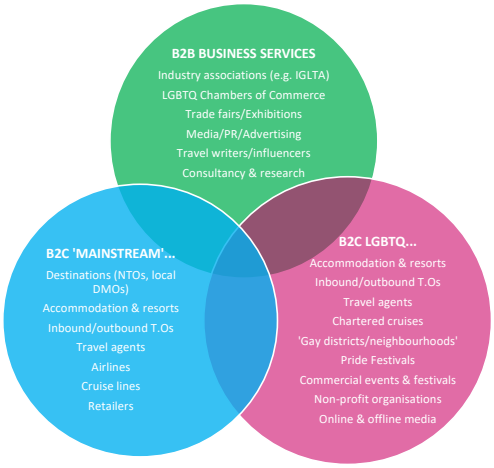


Figure 1: Overview of tourism suppliers with an interest in the LGBTQ segment

A variety of organisations in the public and private sector have an interest in the LGBTQ market. Figure 1, illustrates the collaboration between different groups of organisations with an interest in the LGBTQ market. The pink circle lists organisations whose focus is exclusively, or almost exclusively towards servicing LGBTQ customers. The blue circle lists organisations whose focus is wider, i.e. on the 'mainstream' market but which may also have an interest in attracting LGBTQ customers. Organisations in both categories may call upon the services of B2B providers (green circle) to assist them in understanding the LGBTQ market and in taking their products to market.

8 UN Office of the High Commissioner for Human Rights, Free & Equal: Fact Sheet on Criminalization
9 UN Office of the High Commissioner for Human Rights, Free & Equal: Fact Sheet on Equality and Non-Discrimination
10 Ibid UNWTO (2017), p.15
11 UNWTO (2012) Global Report on LGBT Tourism, Vol. 3, UNWTO, Madrid

2.3 GROWTH AND DIVERSIFICATION

Powered by a mixture of greater social acceptance, advances in equal rights, shifts in corporate culture and business innovation, LGBTQ tourism has, since its origins undergone a continual process of growth and diversification. This is most clearly evident with regard to the following areas, which are explained in **section 2.4**.

Madrid Pride photo by Sasha Charoensub

2.4 LGBTQ EVENTS

2.4.1. Pride

Around the world, events have become a key opportunity for celebration, commemoration, education and above all, visibility for the LGBTQ community. Whether in Reykjavik, Taipei, Beirut, Cape Town, Madrid, Anchorage or Manila, Pride continues to be the most important event the LGBTQ calendar, with some Pride events regularly attracting more than 1 million people.

The origins of Pride lie in 1969, when on 28th June of that year, police raided the Stonewall Inn in New York, a typical occurrence for gay bars in the 1960s. However, on this occasion the patrons fought back, triggering weeks of protests and riots against the treatment of lesbian and gay people by the city authorities. The following year on 28 June 1970, United States' first gay pride march took place in New York in remembrance of those events.[12] In recognition of this, and the International Day Against Homophobia and Transphobia on 17th May each year, Pride events in Europe tend to be held during the months of May, June, July and August.

Typically, most Pride events involve a march or parade accompanied by other events such as seminars, family events, political rallies and parties during the days before or after the main parade. Increasingly major businesses (including airlines and tour operators) are becoming involved as sponsors too. As equal rights for LGBTQ citizens are fought for and won with varying levels of success in different countries, there continues to be intense debate within the LGBTQ community as to the right balance of politics vs. celebration at Pride events, and to what extent corporate interests should be involved.

Nevertheless, there is little doubt about the capacity for Pride events to attract visitors and boost tourism. To date, the biggest Pride event to have occurred in Europe has been WorldPride Madrid 2017 which attracted nearly 2.3 million visitors, 27% (620,000) of whom visited from elsewhere in Spain, and 17% (390,000) from overseas. All those who attended were estimated to have spent a total of 115 million euros during the week-long event.[13] The world's biggest Pride event continues to be that in Sao Paolo, attracting between 3 million and 5 million participants each year. Elsewhere, events such as Taipei and Shanghai Prides draw large crowds from Mainland China and beyond, while Sydney Mardi Gras is the largest LGBTQ event to be held in Oceania, attracting 300,000 visitors in 2017, 8,000 of whom visited from overseas.[14]

While Pride events in major European capitals such as Amsterdam, Berlin, Madrid and Paris continue to attract large crowds, smaller cities, and even towns are now hosting an increasingly diverse range of Pride-related events and are using these to shape perceptions of their destination and attract visitors. Examples include Reykjavik Pride, which now attracts up to 100,000 visitors (including those visiting on chartered cruise ships from the US),[15] Malta Pride (which attracted 2,000 people in 2017),[16] ARN Culture and Business Pride in Tenerife, Spain, and many hundreds more.

Other events and festivals

However, Pride is far from being the only event in the LGBTQ calendar. As visibility and acceptance have increased, so has the range of cultural, sporting and political events aimed at giving visibility to the full diversity of the LGBTQ population. European destinations have proved particularly innovative at adding their own LGBTQ events, hosting new event formats and seeking to appeal to particular groups within the LGBTQ segment.

> "European destinations have proved particularly innovative at adding their own LGBTQ events."

For example, most large European capital cities now host a LGBTQ film festival such as the Roze Filmdagen in Amsterdam or the Festival Mix in Milan, showcasing LGBTQ-interest films and documentaries from around the world.

LGBTQ Awareness: Key Dates

International Trans Visibility Day: 31 March

International Lesbian Visibility Day: 26 April

International Day Against Homophobia and Transphobia: 17 May

International LGBTQ Pride Day: 28 June

12 CNN (2016) Stonewall Inn likely to become first national monument to LGBT rights (10-05-2016) available at www.cnn.com
13 El Mundo (2017) 2,3 milliones de personas y 115 milliones de gasto durante el WorldPride 2017 (07-07-2017), available at www.elmundo.es
14 Forbes (2018) From Demonstration to Dividend, How Sydney's Mardi Gras has Become Big Business (02-03-2018), available at www.forbes.com
15 Reykyavik Pride (2018) About Rykyavik Pride http://hinsegindagar.is/en/about-reykjavik-pride/
16 Malta Pride (2018) History of Malta Pride http://www.maltapride.com/

European cities with large LGBTQ populations are frequently home to gay sports teams such as football, rugby and water polo. Notably, Paris hosts the Gay Games in 2018, a quadrennial event dedicated to promoting equality through sport, while European Gay Ski Week is held in Switzerland on an annual basis.

In addition to this, large music festivals such as the Circuit Festival (due to attract around 60,000 people in 2018, around 70% of whom visit from overseas) and Girlie Circuit Festival (due to attract 8,000 people in 2018, 60% of whom visit from overseas) take place each year in Barcelona.[17] Other popular commercial LGBTQ music and culture festivals in Europe include La Démence (Brussels), Sexy Party (Cologne), Milkshake (Amsterdam) and Ella Lesbian Festival (Majorca), attracting local residents and visitors from abroad too. In 2017 Manchester (UK) hosted Sparkle in the Park, an event dedicated to the transgender community that attracted over 10,000 attendees.

Finally, while not officially conceived as a LGBTQ event, the Eurovision Song Contest (held annually in May) is well-known to attract a large following from the LGBTQ population in Europe, with an expanding interest elsewhere, in particular from Australia, Canada, the Philippines and the US. A total of 200 million people around the world are estimated to watch the event on TV. The event, which now includes two semi-final evenings in addition to the main contents night attracts themed parties, as well as people to visit the host city. In 2016 the host city of Stockholm saw an additional 38,000 fans travel to the city, while 20,000 fans visited Kiev in 2017 and around 30,000 visited Lisbon in 2018.[18] [19]

2.4.2 LGBTQ tours and activities

Since Hanns Ebensten, widely considered the father of gay travel, ran his first tour – a trip down the Grand Canyon's Colorado River in 1973 – the tours and activities marketplace for LGBTQ consumers has grown and diversified considerably.[20] In line with the global trend and thanks to the internet as well as improved acceptance and accessibility, LGBTQ travellers have become more ambitious and adventurous in their travel plans.[21]

Over the past five decades, small businesses – both inbound or outbound tour operators have been instrumental in embracing the LGBTQ market and helping LGBTQ travellers to discover a new side to countries whose LGBTQ residents may still face high levels of social discrimination. They have typically done so by developing local networks of accommodation providers and guides who can assure an atmosphere of safety and respect for same-sex couples or groups of LGBTQ travellers, packaging these and selling them overseas. There are examples of such tour operators on every continent. These include McBern Tours Uganda, Foozoo Infinite Sri Lanka, Brazil Ecojourneys, Ella Lesbian Festival Tour to Nepal, Llamatrip Peru.

At the same time, major corporations -notably US-owned hotel groups and airlines- have worked intensively to embrace the LGBTQ market by providing training in diversity awareness among staff, setting up 'LGBTQ resource

"Over the past five decades, small businesses have been instrumental in embracing the LGBTQ market and helping LGBTQ travellers to discover a new side to countries whose LGBTQ residents may still face high levels of social discrimination."

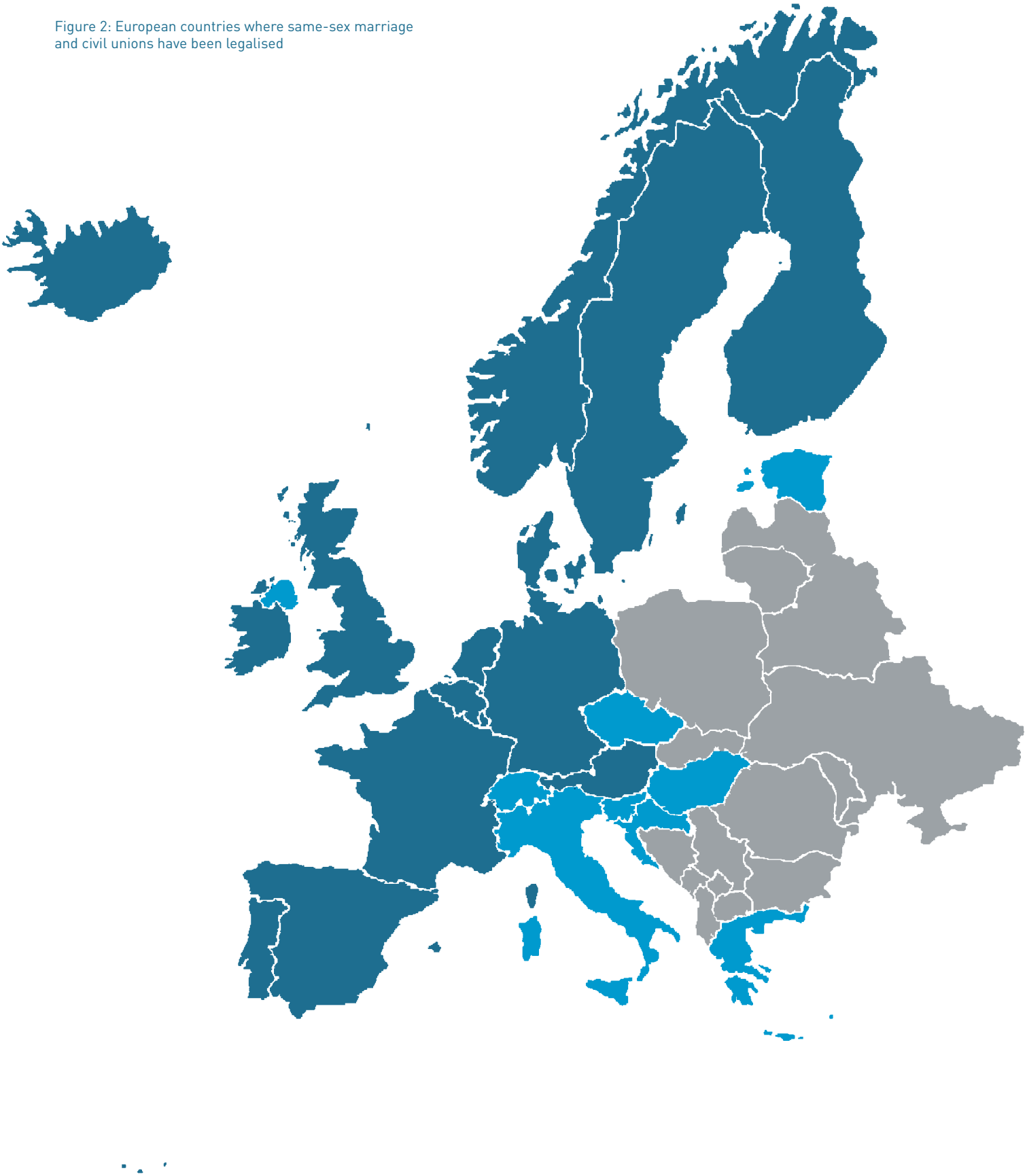
networks' of employees and marketing towards LGBTQ consumers. In this way, LGBTQ travellers have been able to travel with a relative degree of comfort and safety to a wider range of destinations.

2.4.3 Same-sex weddings and celebrations

The legalisation of same-sex marriage represents a clear advance towards the acceptance of lesbian and gay people in the countries where it has occurred. The Netherlands was the first country to legalise same-sex marriage in 2000, followed by Belgium in 2003. At the time of publication (June 2018), a total of 26 countries have legalised same-sex marriage (with full or nearly full rights accorded to couples, equivalent to opposite-sex marriages), of which 16 are among the 35 states covered by this study. Same-sex unions or civil partnerships are legal in a further 12 countries, of which 9 are in Europe. As UNWTO (2017) notes, when discussing equal marriage, it is important to consider that this is a relatively new phenomenon that has occurred almost exclusively in developed countries, and one which remains a distant dream for LGBTQ people in those countries which discriminate severely on grounds of sexual orientation and gender identity.[22]

17 Data provided by Matinee Group
18 Eurovoix (2018) Eurovision '18: Number of Fans up 37% in Lisbon for Duration of Contest (04-04-2018)
19 DW (2018) Glitzy Eurovision pageant gives boost to Lisbon tourism (08-05-2018)
20 Ibid UNWTO (2017), p.16
21 Ibid UNWTO (2017), p.60
22 Ibid UNWTO (2017), p.48

Figure 2: European countries where same-sex marriage and civil unions have been legalised



Key:

Same-sex marriage	Same-sex civil union

Source: Pew Research Center (2017) Where Europe stands on gay marriage and civil unions (30-06-2017), available at www.pewresearch.org

Table 1: European countries/regions allowing same-sex marriage and civil partnership, with year of legalisation

Country/region	Year same-sex marriage legalised
Netherlands	2000
Belgium	2003
Spain	2005
Norway	2008
Sweden	2009
Iceland *	2010
Portugal	2010
Denmark	2012
France	2013
United Kingdom **	2013
Luxemburg	2014
Finland	2015
Ireland	2015
Germany	2017
Malta *	2017
Austria	from 2019

Country / region	Year same-sex civil unions were legalised[23]
Northern Ireland	2004
Slovenia	2006
Czech Republic	2006
Switzerland	2007
Hungary	2009
Liechtenstein	2011
Andorra	2014
Croatia	2014
Estonia	2014
Greece	2015
Italy	2016

*Year in which the first legislation on same-sex partnerships was introduced. In some countries these have been subsequently amended to grant further rights than was originally the case at the time of legalisation

**Same-sex marriage legalised in England and Wales in 2013, and Scotland in 2014

23 Year in which the first legislation on same-sex partnerships was introduced. In some countries these have been subsequently amended to grant further rights than was originally the case at the time of legalisation

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2.4.4 The impact of same-sex marriage on the tourism sector

On a global level, the tourism sector has seen tangible and intangible benefits from the legalisation of same-sex marriages and civil unions in three broad areas:

1. Increased number of weddings creates greater economic impact. In the jurisdictions where same-sex weddings (which may be formally known as marriages or civil unions) have taken place, hotels, restaurants, event planners, entertainment providers and other suppliers have experienced greater demand. A study of the economic impact of same-sex marriage in New York in 2016 found an estimated annual impact of US $200 million from same-sex weddings in the city alone, and an average expenditure per guest of US $500.[24]

2. Destination weddings and big-ticket honeymoons. According to a 2016 report by Community Marketing Inc., 80% of same-sex couples in the US declared that they expected to take a major vacation in the 12 months following their wedding ceremony.[25] The following year, a study by The Knot and Q.Digital found that 35% of gay men and 29% of lesbians reported that they had held a 'destination wedding' away from home.[26] According to CMI, a combined total of 25% US same-sex couples have travelled to Europe for this purpose.[27]

   Furthermore, various travel industry specialists from China interviewed for this study confirmed that they knew of Chinese couples who had chosen to hold a wedding ceremony in Europe or the US, even if the marriage was not formally recognised at home.

3. Improving perceptions of the national 'brand'. To some extent, the approval of same-sex marriage legislation has become short-hand for a country's acceptance of its LGBTQ population in society. While the presence of equal marriage legislation may not give a clear picture of the daily reality of life as an LGBTQ citizen, the act of legalising same-sex marriage can attract positive headlines in the global media, helping to improve perceptions about the country. In 2015 Tourism Ireland seized upon this opportunity immediately after the country voted 'yes' to legalise same-sex marriage in a referendum. The Ireland Says "I do" campaign featured romantic wedding venues and locations and was rolled out in nine markets via social media.[28]

According to Bernadette Smith of the Equality Institute in the United States, while the growth in same-sex marriages and civil unions offers clear benefits for tourism suppliers and destinations, it is important to recognise the emotional significance that comes with wedding celebrations, and to ensure that suppliers are well prepared and approach same-sex weddings with an open mind. Some same-sex couples have reported fear of being turned away by wedding suppliers, and many prefer to leave out the traditional rituals assigned to opposite-sex couples.[29]

Finally, aside from marriages and civil unions, various tourism industry specialists in the US interviewed for this study highlighted that the LGBTQ market demonstrates a strong tendency to travel to Europe in couples and with friends to celebrate major wedding anniversaries and birthdays.

24 NYC&Company (2017) The Economic Impact of Marriage Equality in New York City
25 Community Marketing Inc. (CMI), (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
26 Jacobson, I., (2017) *Top Trends and Stats from our 2017 LGBTQ Weddings Study*, The Knot, available at: www.theknot.com
27 CMI (2017), 22nd Annual LGBTQ Tourism Report, available at: www.cmi.info
28 Tourism Ireland (2015) Ireland says "I Do!", available at www.tourismireland.com
29 Presentation by Bernadette Smith, Equality Institute, IGLTA Convention 2018

2.5 TRENDS IN LGBTQ TRAVEL

The trends that are shaping demand in the LGBTQ market segment for travel are, like every other segment, shaped to some extent by macro-trends such as the state of the global economy, digitalisation, evolving social values and changing demographics. Nevertheless, the fact that LGBTQ people in different parts of the world face very different scenarios with regard to such fundamental elements of life as expressing their identity openly, finding a partner or getting a job, inevitably has an impact on their personal values and consumer choices. These factors may change from country to country and even from city to city.

The following section sets out nine broad, interconnected trends that are shaping demand in the LGBTQ segment around the world:

Figure 3: Overview of trends shaping demand in the LGBTQ travel segment

Visibility is advancing acceptance

The relationship between LGBTQ visibility and social acceptance has become self-perpetuating. As LGBTQ people become more visible in the press, on social media and in public life, research has shown that social attitudes towards LGBTQ people become more accepting. Conversely, the level of social acceptance determines the extent to which LGBTQ issues are discussed in the media, and how confident companies are about openly reaching out to their LGBTQ employees and customers. As LGBTQ people become more visible through public campaigns and advertising, this helps nurture confidence among LGBTQ people in being visible and in revendicating their rights.

The generational revolution in attitudes towards SOGI (sexual orientation and gender identity)

During the last 20 years, almost uniformly around the globe, a revolution in attitudes towards 'SOGI' has occurred, as Generation Z (age 18 and under) and Millennials (ages 18-35) are showing a much greater acceptance of LGBTQ people in society, and a willingness to openly identify as LGBTQ themselves, compared to Baby Boomers (born 1946-1964) and Traditionalists (born 1913-1945). According to a Gallup Survey, the percentage of Millennials who identify as LGBT expanded from 7.3% to 8.1% from 2016 to 2017, and is up from 5.8% in 2012, with Millennials more than twice as likely as any other generation to identify as LGBT.[30]

30 Gallup (2017) *In US, estimate of LGBT population rises to 4.5%* (22-05-2017), available at www.news.gallup.com

Even in more conservative countries, younger respondents are consistently more likely than older ones to say that homosexuality should be accepted by society.[31] This shift can be attributed to a variety of factors including globalisation, widespread use of social media, a shift in corporate culture and politics, and the process of increasing visibility described above.

Friends, family and allies broaden the concept of a 'gay vacation'

As social acceptance of LGBTQ people becomes more widespread, rather than being confined to certain 'gay-friendly' destinations, LGBTQ people are able to choose their destination much like everyone else; i.e., according to the weather, cultural offerings, activities and budget.[32] Tourism suppliers in the LGBTQ market report a greater willingness among LGBTQ travellers (particularly in younger age groups) to include their friends and families within holiday packages, while LGBTQ parenting has also become more common, increasing demand for destinations and accommodation providers than can assure a welcoming environment for same-sex parents and their children.

Furthermore, allies (individuals who are not LGBTQ but who openly support LGBTQ equality) have also become more defined as a segment of consumers with whom LGBTQ issues resonate. In this way, the profile of travellers who have some kind of interest in LGBTQ acceptance has broadened, while the concept of what constitutes a 'gay holiday' has become more diffuse.

LGBTQ stakeholders are on the corporate radar

In many instances, the business community has contributed to driving social change. An increasing number of multinational corporations has identified the value of openly declaring its support for LGBTQ rights, both in terms of social capital, increased customer loyalty and improved internal operations. In recent years, companies in a whole range of sectors have publicly supported organisations such as the Human Rights Campaign (which has campaigned strongly for equal marriage in the US) or joined coalitions such as Open for Business in order to share knowledge and demonstrate their commitment to equal rights for their LGBTQ shareholders.

In countries such as the US, UK and others, the travel industry has proved itself to be an early leader in this respect. This is important because travel businesses are by nature trans-national and have the power to improve the lives of LGBTQ people overseas for example, by giving greater visibility to LGBTQ people through advertising, or by supporting their employees through LGBTQ resource groups. The recommendations section of this report (Chapter 5) gives more information about how companies can actively become agents of change on LGBTQ rights.

31 Pew Research Center (2013) *The Global Divide on Homosexuality*, (04-06-2013), available at: pewglobal.org
32 Ibid UNWTO (2017) p.40

Digitalisation is driving change in the real world

Just as in many other areas of the travel industry, the shift towards online inspiration, research, planning and booking has opened up many possibilities for LGBTQ people to meet, socialise and discover new destinations. Online dating apps such as Grindr, Scruff, Her, Tinder, Hornet and Blued have triggered major changes in the way LGBTQ people meet. When travelling, apps have become a widely used method of asking local people where to go and what to do.[33] For LGBTQ people in more culturally conservative countries, social media has made it possible to share advice, news and gossip and to develop a better understanding about LGBTQ life elsewhere.

> "For LGBTQ people in more culturally conservative countries, social media has made it possible to share advice, news and gossip and to develop a better understanding about LGBTQ life elsewhere."

The internet has also caused other changes in LGBTQ life. Social networks have created a powerful tool for gathering support for LGBTQ rights and applying pressure on governments and businesses that discriminate against their LGBTQ citizens. Meanwhile, increased use of dating apps is widely considered to have contributed to the decline in LGBTQ nightlife in many major cities as people meet online in greater numbers.

The growing potential of emerging LGBTQ outbound markets

Those departing on leisure trips from the world's fastest-growing outbound markets inevitably include LGBTQ travellers. Whether they travel in the same proportion as their LGBTQ counterparts in mature outbound markets such as the Australia, Canada, Germany, the US or UK is subject to debate. Assuming, at a conservative estimate, that 3% of the population is lesbian or gay, the gay and lesbian population of China could potentially reach over 48.3 million people in China, and 39.3 million people in India.[34] However not all citizens have the means to travel abroad; research has found that the economic participation of LGBTQ people in many developing countries is lower, due to the effects of discrimination.[35]

Nevertheless, the research for this report demonstrates that LGBTQ people in countries such as China, Japan and Russia have a strong desire to travel, and in particular to explore Europe. It is also important to note that for LGBTQ travellers from more culturally conservative countries, travelling frequently offers the opportunity to live their sexual orientation or gender identity openly, without fear of reprisals. This could take the form of spending quality time together as a couple, meeting other LGBTQ people or experiencing gay neighbourhoods and nightlife.

Social capital and the value of travel

Consumers around the world are dedicating more of their disposable income towards travel and leisure experiences. Social media has helped to amplify this trend, causing consumers to seek ever-greater levels of quality, authenticity and uniqueness throughout their journey, with the effect of generating 'social capital' for the traveller among his or her peers. The presence of luxury brands in the LGBTQ market, as well as constant innovation in events and travel products for this segment (particularly gay men), suggests that travel as a source of social capital is particularly important for the LGBTQ consumer.

It is also the case that the gay and lesbian market is often targeted by travel brands and destinations due to the perception of higher disposable income, and that gay men and lesbians frequently have no (or fewer) dependent children. While there is some truth in this, some studies have shown that lesbian couples earn less per capita than gay or heterosexual couples due to the gender pay gap, while an increasing number of same-sex couples are becoming parents. Nevertheless, the social status associated with travel has become especially pronounced in the LGBTQ segment.

Pride and personalisation

The trend towards personalisation is clear across a number of travel industry verticals. In the case of LGBTQ travellers, particularly same-sex couples, this means ensuring, at the most basic level, that they are welcomed, treated with respect and able to travel in an accepting environment. More sophisticated personalisation comes from tourism suppliers that recognise and even celebrate LGBTQ diversity, and same-sex relationships, for example by providing romantic tours and bespoke experiences for same-sex couples or adding special touches to help celebrate honeymoons and anniversaries. Whereas LGBTQ people once travelled with a maximum level of discretion for fear of discrimination, businesses and destinations are now joining in to celebrate same-sex relationships, and events such as Pride.

33 Ibid UNWTO (2017) p.68
34 Based on general population data from UN Department of Economic and Social Affairs, Population Division (2015), *World Population Prospects: The 2015 Revision*, available at: www.un.org/development/desa
35 Miller, J. & Parker, L. (2015) '*Open For Business, The economic and business case for global LGBT inclusion*', p.36, available at www.open-for-business.org

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Events, festivals and tours: new formats, new markets

An increasing number of destinations and businesses are looking to signal their openness to LGBTQ travellers by hosting events and festivals, or running tours that cater to new, under-served areas of the market. These often differ from the traditional Pride format by including a roadshow round a country (e.g. Pink Week Slovenia), launching an event in a new destination (e.g. Tropout Festival in Malta or New Caledonia; Ella Lesbian Festival Tour to Nepal), or trying a new format (e.g. Gay Wine Weekend in Sonoma, California; TwoBadTourists Sailing Tour of Croatia). The overall trend appears to be towards smaller, more 'active' formats that cater to travellers who seek more than the commonly recognised sun and party combination.

2.6 THE FUTURE EVOLUTION OF LGBTQ TOURISM

The future evolution of the LGBTQ market segment in travel is likely to be influenced by three broad factors (shown in purple in Figure 4):

1. The macrotrends shaping demand and supply in the tourism sector generally
2. The extent to which LGBTQ people are able to live without fear of discrimination, their human rights are protected by law, and these laws are upheld
3. The extent to which LGBTQ people are visible in society and that tourism suppliers in source markets and destinations are confident to engage with the market openly

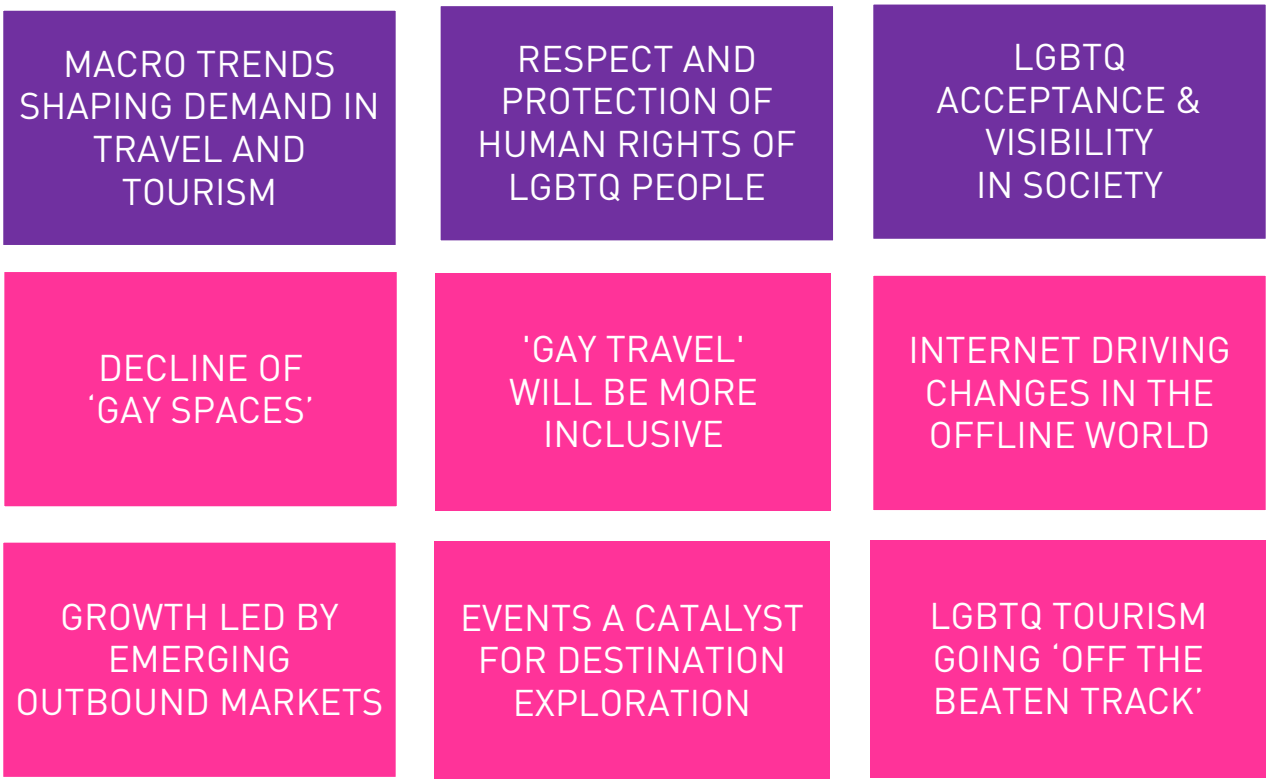

Figure 4: Overview of trends shaping the future evolution of LGBTQ tourism

As UNWTO (2017) observes, '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.'[36] As well as seeking to meet others, demand among LGBTQ travellers generally is also likely to be shaped by the desire to visit destinations that can simply offer a relatively safe and accepting environment for the local LGBTQ population.

In addition to these broad factors, a series of further, more specific observations can be made regarding the expected future evolution of demand in this segment:

36 Ibid UNWTO (2017) p.82

'Gay spaces' are likely to continue their decline

Over the past decade, in much of North America, Western Europe, Australia and New Zealand (i.e. countries where LGBTQ rights have been consolidated for some time), shops, bars, nightclubs and even neighbourhoods that were once considered to be exclusively 'gay' have been undergoing a relatively rapid transformation, by adapting to become open to a more diverse customer base, or even by closing entirely. In the ten years to 2017, the number of LGBTQ venues in London fell by 60%, driven by a combination of rent increases, gentrification and a fall in demand as clientele meet online or change their spending habits.[37] As large nightclubs in major cities have closed, they have been replaced by themed nights on a weekly or monthly basis, seeking to widen their appeal towards a younger 'gay-friendly' demographic. As the processes of urbanisation, gentrification and digitalisation continue, the decline of exclusively gay spaces is likely to continue.

The concept of 'gay travel' will become more inclusive

As the social acceptance of LGBTQ people increases and more people are willing to openly identify as lesbian, gay, bisexual, transgender or queer, this is likely to drive (gradually) the greater visibility of the LGBTQ population in all its diversity. With time, stereotypes are likely to become even less relevant and as part of this process, the concept of what makes a 'gay holiday' or is likely to become steadily more diffuse. If younger travellers are more out to their parents and friends, they will be happier to involve them in their holiday plans. Various LGBTQ specialist travel operators have already observed a preference among younger customers to include their non-LGBTQ family and friends on trips.

The internet will continue to drive change in the offline world

The internet has proved to be a powerful agent for change for LGBTQ people in many different ways; by helping them to meet, learn and share experiences, and crucially, as a means of support to individuals who live in countries where identifying openly as LGBTQ can be dangerous. Social media has been particularly important here, and it is likely to continue to drive the process of greater LGBTQ visibility, and for travel, highlighting places and events that appeal to the LGBTQ population. At the same time, the travel industry could also offer opportunities for disconnection and real-world interaction for those who are disillusioned with dating apps and social media.

> "Innovation among LGBTQ tourism suppliers has proved that the demand is there for destinations that are prepared to do the work to ensure a safe, accepting environment for LGBTQ visitors."

Travel will exert a strong attraction for LGBTQ consumers in emerging outbound markets

Demand for outbound travel is likely to be strong in the coming years among LGBTQ consumers in developing countries, especially those where overt LGBTQ marketing is easier through online and offline channels. Destinations that have a strong history in advancing LGBTQ rights, openly LGBTQ public figures, and a visible local LGBTQ population are likely to exert a strong pull on travellers from these markets. As the research for this report shows, this represents a significant opportunity for many European destinations.

LGBTQ events will be the catalyst for exploring destinations more widely

Pride events can be expected to grow and create a compelling reason for LGBTQ people to travel, in particular when they:

- Take place in a new city or country, or adopt an innovative format
- Help local LGBTQ people to come out and be more visible
- Provide an opportunity for businesses and political parties to show their support
- Provide an eye-catching event which is widely shared on social media

37 Reuters (2017) *More than half of London's LGBT clubs and pubs have closed in the last decade – report* (07-07-2017). Available at www.reuters.com

LGBTQ travellers from mature outbound markets will go increasingly 'off the beaten track'

As travellers in general become more adventurous and seek to visit a more diverse range of destinations, demand is likely to grow from LGBTQ travellers in mature markets who seek to visit countries that may not have a particularly visible local LGBTQ population, or a record in protecting their human rights. Nevertheless, innovation among LGBTQ tourism suppliers and research carried out for this study has proved that the demand is there for destinations that are prepared to do the work to ensure a safe, accepting environment for LGBTQ visitors.

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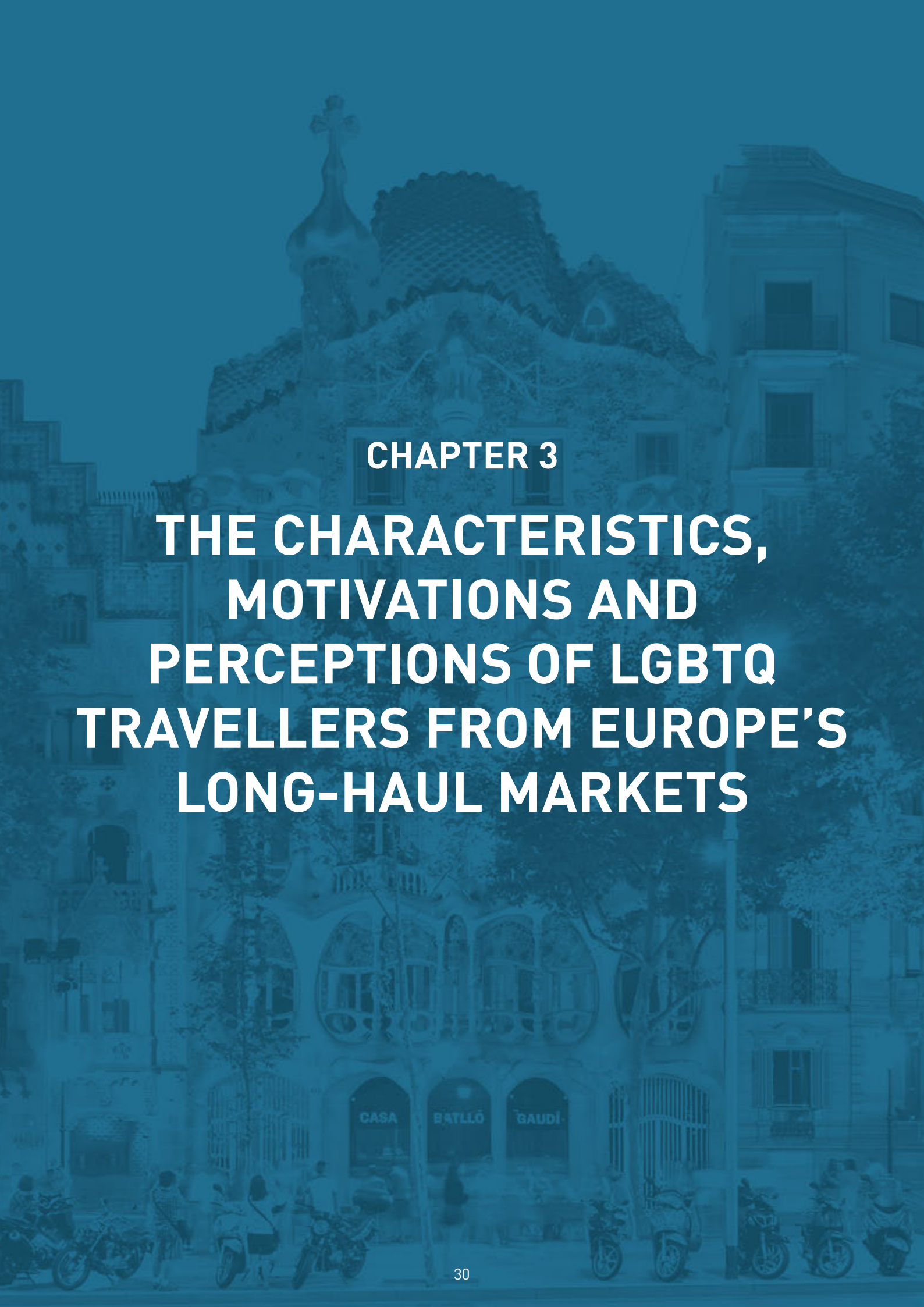


CHAPTER 3

THE CHARACTERISTICS, MOTIVATIONS AND PERCEPTIONS OF LGBTQ TRAVELLERS FROM EUROPE'S LONG-HAUL MARKETS

In addition to gaining a better understanding of global trends within the LGBTQ segment, this study sought to find out first-hand how Europe is perceived by LGBTQ consumers in its five most significant markets (in terms of volume): Brazil, China, Japan, Russia and the United States.

What percentage of the population identifies as LGBTQ?

Even in countries where LGBTQ people live more openly, individuals may be unwilling to self-identify as LGBTQ for fear of social discrimination, or may not interact with the channels through which surveys and interviews are conducted. This set of circumstances seriously impairs the ability of researchers to properly identify LGBTQ people, seek their collaboration with research and gain insights from a representative sample of the LGBTQ population.

Few countries ask their citizens about sexual orientation in official censuses, and as one report on Europe's LGBT population in 2016 points out, even when surveys do collect information about LGBT demographics in a certain region or country, it is difficult to compare the results because responses are very sensitive to how the questions are phrased and what answer options are offered.

A census-representative survey by Dalia research in August 2016 of 11,754 people across the EU found that 5.9% of Europeans identify as LGBT when asked directly. Country-specific results included 7.4% in Germany, 6.9% in Spain, 6.5% in the UK, 6.4% in the Netherlands, 5.4% in France, 4.9% in Poland, 4.8% in Italy and 1.5% in Hungary.

When respondents were given the opportunity to select a sexual orientation somewhere on the Kinsey scale (a study from the 1940s that measures the scale of human sexuality), the study found that the share of people who identify as not only heterosexual was nearly twice as high (10%) as the percent who identify as LGBT from a yes/no question (5.9%). Significantly, the percentage of 14-29-year-olds who described themselves as not only heterosexual rose to 16%, compared to 7.5% of those aged 30-65.

- Dalia Research (2016) Counting the LGBT population: 6% of Europeans identify as LGBT (18-10-2016), available at: www.daliaresearch.org

3.1 THE CHALLENGE OF COLLECTING INSIGHTS ON LGBTQ CONSUMERS

If there is a disparity across Europe in the visibility and acceptance of LGBTQ people, this disparity is even more pronounced within and between the source markets described above. In many countries that are perceived as culturally conservative (including some of the target markets for this study), the LGBTQ population is either ignored by the authorities, censored (online and offline) or actively persecuted. As a result, in many places individuals may be unwilling to self-identify as LGBTQ for fear of their own safety, and there is often a lack of channels such as LGBTQ specialist media, or physical spaces where researchers may reach LGBTQ people in order to carry out surveys and interviews.

The internet has created more opportunities to reach LGBTQ people quickly and conveniently, in particular through dating apps and social networks. However, it is important to note that the popularity of individual apps and networks can vary significantly from country to country and between different sectors of the population, making it difficult to draw a clear, consistent picture of the LGBTQ population as a whole. For this reason, the consumer primary research conducted for this Handbook should be interpreted as exploratory, and not representative.

3.2 METHODOLOGY OVERVIEW

This study aimed to address some of the challenges outlined above by using the following methods for collecting primary quantitative and qualitative data:

- Online survey carried out through Hornet, a social network for the gay community with 18 million users worldwide.[38] Surveys were translated into the relevant languages and distributed via instant message (in-app-notification) to users located in each of the target markets, and also present on the company's corporate blog for a total of 44 days, from 26-04-2018 to 09-06-2018.

- A total of 4,600 responses were collected from the target markets: Brazil, China, Japan, Russia and the United States.

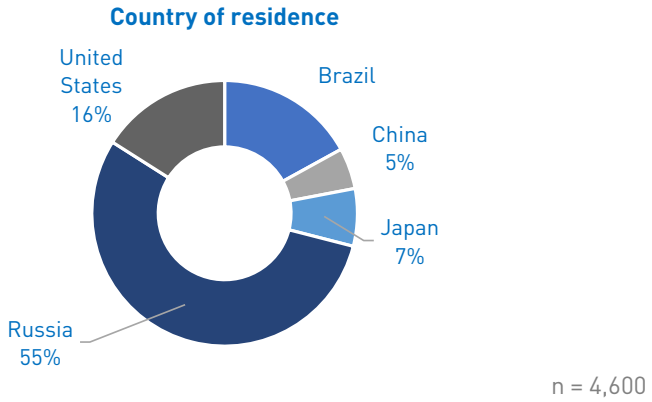
- In-depth interviews carried out with 18 travel industry professionals and experienced travellers in four of the five target markets. These include seven in-depth interviews with experienced lesbian travel writers, as well as two respondents who identified openly as bisexual and transgender, respectively. Interview questions covered preferred country combinations, barriers to travel and cultural factors shaping demand from the outbound market among the LGBTQ segment.

Both quantitative research from the online survey as well as qualitative research from the expert interviews are presented in this chapter. Further information on the research methodology for this Handbook is included in Annex 1 of this report.

38 Hornet Media Kit, version 1.2.4, p.2

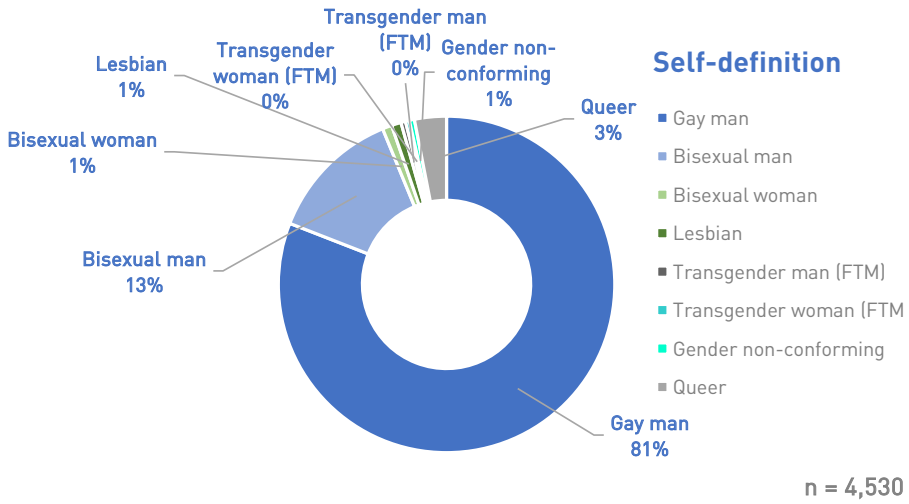
3.3 RESPONDENT CHARACTERISTICS

Just over half of the respondents were from Russia (n = 2500), with a roughly equal distribution of respondents from Brazil (n = 780) and the United States (n = 760). China (n = 225) and Japan (n=303) returned samples which were too low to be suitable for individual consideration, however they have been included in the combined data set as an indication of traveller sentiment from Europe's long-haul markets as a whole. Possible reasons for the low response rate from China include official restrictions on LGBTQ-related content online interfering with the survey collection software, while in Japan, the low response may have been caused by reticence on the part of users to share personal information.

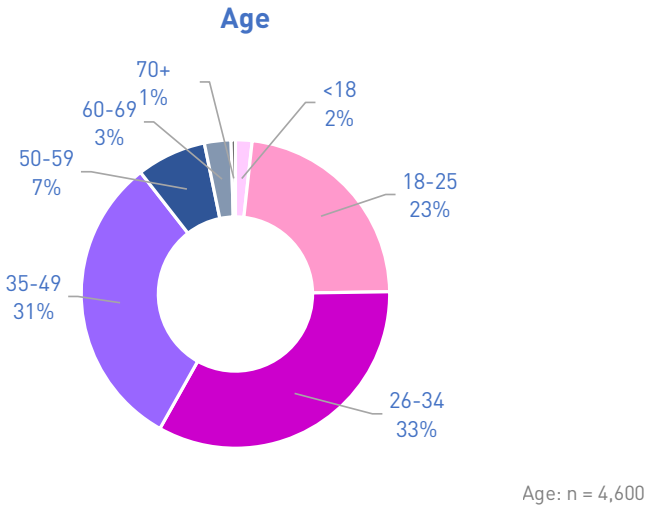


When combined, gay and bisexual men account for 94% of respondents. This was expected, in light of the survey distribution method used, which is a social network mostly popular with gay and bisexual men. Lesbian and bisexual women accounted for 1.83% of respondents (n = 83) while transgender respondents (both male-to-female - MTF and female-to-male - FTM) accounted for 0.82% of respondents (n = 37). Those who defined themselves as gender non-conforming accounted for 0.49% of respondents, while those who defined themselves as queer accounted for 3.07% (n = 140).

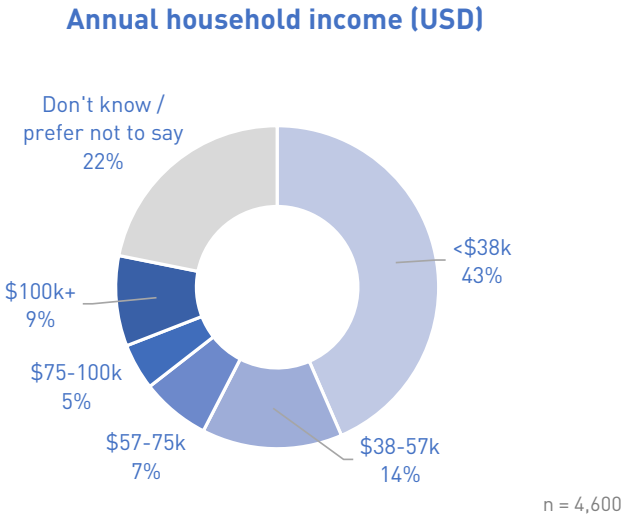
Given the significant imbalance of respondents among the various target groups, the researcher sought qualitative insights on lesbian, bisexual and transgender travellers through a series of interviews. Insights from these interviews are summarised in sections 3.9 and 3.10 at the end of this chapter.



More than half of respondents (56%) are Millennials, in the 18-34 age group, with nearly 1 in 3 respondents members of Generation X (35-49 years). Respondents over the age of 50 account for just 11% of the total share. This age spread could be linked to the survey distribution method used (a social network with high mobile usage), however it is significant that the majority of data collected relates to Millennials since recent editions of the ETC Long Haul Travel Sentiment Index have shown this group to be the most interested in travelling to Europe.[39]



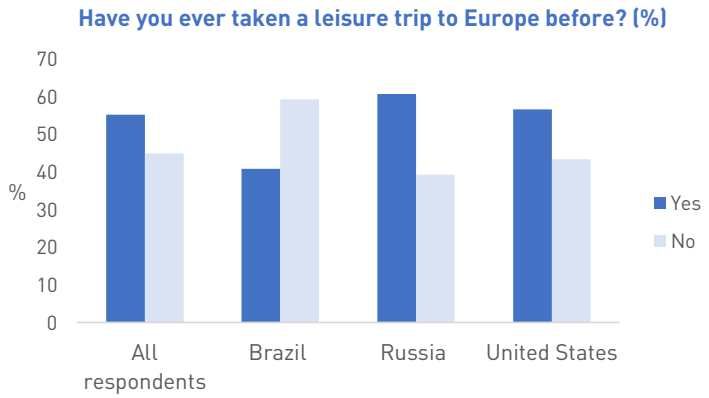
Annual household income among the surveyed group is relatively low, with 43% earning less than US $38,000 (approximately €32,000), a threshold at which long-haul international leisure travel is likely to become attainable for consumers in the surveyed markets. It is also significant that almost 1 in 10 reports an annual household income of over US $100,000 (approximately €85,000).



39 For more information about the ETC Long Haul Travel Sentiment Index, please visit: http://www.etc-corporate.org/reports/long-haul-travel-barometer-13-2018

In the following section, data presented as 'all respondents' to the online consumer survey refers to all five of the surveyed markets (Brazil, China, Japan, Russia and the United States). A breakdown of data for markets with a sufficiently high sample (Brazil, Russia and the United States) is provided in addition to this.

3.4 EUROPEAN TRAVEL EXPERIENCE



n = 4,375

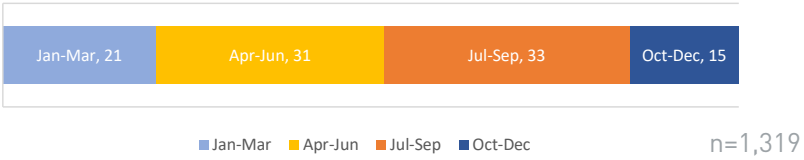
Travel experience in Europe among respondents in general is relatively high, with an average of 55% of respondents having visited Europe. Leisure travel experience in Europe was highest (61%) among Russian respondents (to be expected due to its geographical proximity), while it was lowest among Brazilian respondents (41%), which may be due to a combination of current concerns about the Brazilian economy, and perceptions that European destinations are expensive to visit. 57% of US respondents had previously visited Europe for a leisure trip, a higher amount than would be expected of the US market in general.

n = 1,310

Respondents who had visited Europe for a leisure trip were asked who they had visited with on their most recent trip. Among respondents from all the surveyed long-haul markets, almost 1 in 3 had visited with their partner or spouse, while there was an almost equal balance between those who had visited alone (29%) and those who had come with friends (27%). The number of respondents who had visited with a partner or spouse is closely aligned with the perception of Europe as a romantic destination, and highlights the opportunity for destinations that already focus their association with romantic holidays.

In line with expectations, far fewer respondents had visited with other adult family members (e.g. parents, uncles, siblings) or work colleagues (6% and 2% respectively).

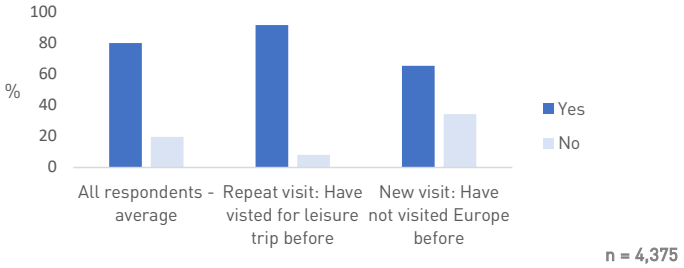
AT WHAT TIME OF YEAR DID YOU VISIT? (%)



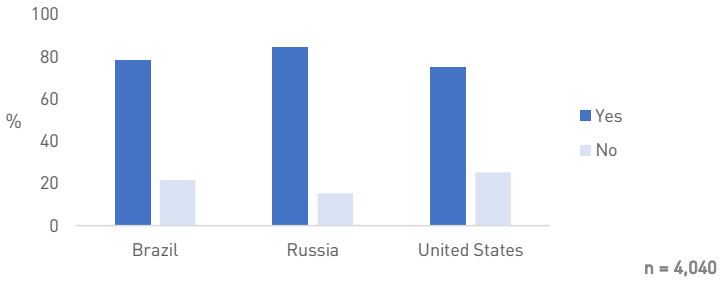
Visits to Europe on respondents' most recent trip were relatively well spread throughout the year, with a slightly greater tendency (1 in 3) to have visited in the peak summer months of July, August or September. April, May and June were also popular, with 31% of respondents having visited Europe during this period. It is also significant that 1 in 5 respondents had visited the region during winter/early spring, between January and March. This is largely in line with expectations, as anecdotal evidence suggests that LGBTQ travellers are less likely to be influenced by school holidays in choosing when to take a holiday. With 2 in 3 respondents having visited in spring or summer, this may also align with the popularity of LGBTQ events and festivals, highlighted in section 3.5.

3.5 FUTURE TRAVEL PLANS

Do you expect to take a leisure trip to Europe in the next three years? (%, New vs. repeat visitors)



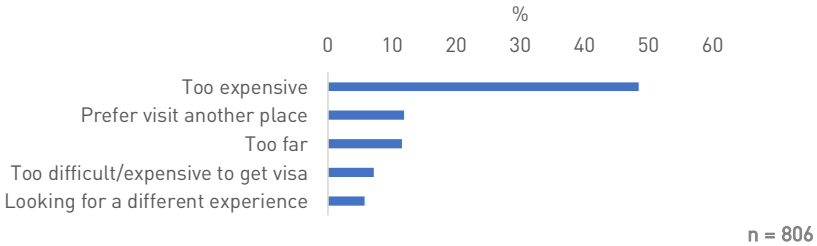
Do you expect to take a leisure trip to Europe in the next three years? (%, Country breakdown)



Intentions of visiting Europe within the near future are high, with an average of 80% of respondents expecting to visit within the next three years. Expectations of repeat visits were particularly high (91%) among those who had already visited, and lower (66%) among those who had not yet visited.

Russians show the highest expectation of visiting in the next three years (at 85%, and expected due to Russia's proximity to Europe), with the US market relatively lower at a still significant 75%.

Reasons for not visiting Europe in the next three years
(Top five reasons, average of new and repeat visitors)

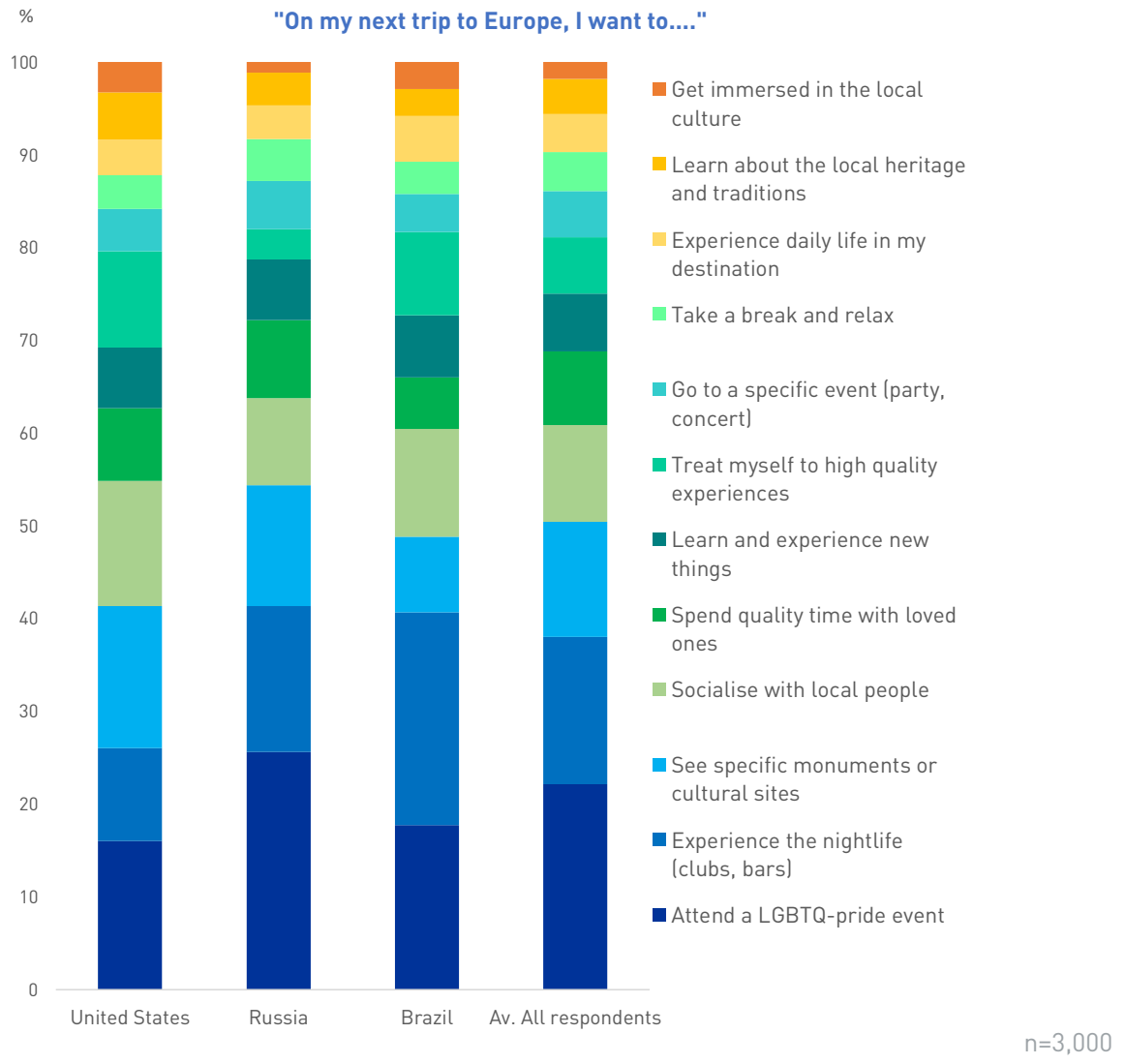


Respondents who answered that they did not expect to visit Europe within the next three years were asked for the reason why not. They were given a choice of 11 reasons, including 'fears about personal safety', 'language barriers', or 'lack of things to do'.

Among the 20% of respondents who did not expect to visit Europe within the next three years, by far the strongest reason given was that it is perceived as too expensive, a finding that was supported through the expert interviews, particularly among Chinese and Brazilian travellers. This finding may correspond to the large share of respondents with a relatively low household income per annum (less than US $38,000).

The spread of respondents who preferred to visit somewhere else, or thought it was too far was even, at 12% each, suggesting that other competitive destinations are currently proving more attractive. Only 7% of respondents thought that it would be too difficult or expensive to obtain a visa, which is significant in light of the high number of Russian respondents who would need one, and thus appear not to regard it as an obstacle. In line with the findings from the expert interviews, it is also significant that fears over personal safety were not a factor that would dissuade respondents from coming to Europe soon.

3.6 EUROPEAN TRAVEL AMBITIONS AND PREFERENCES



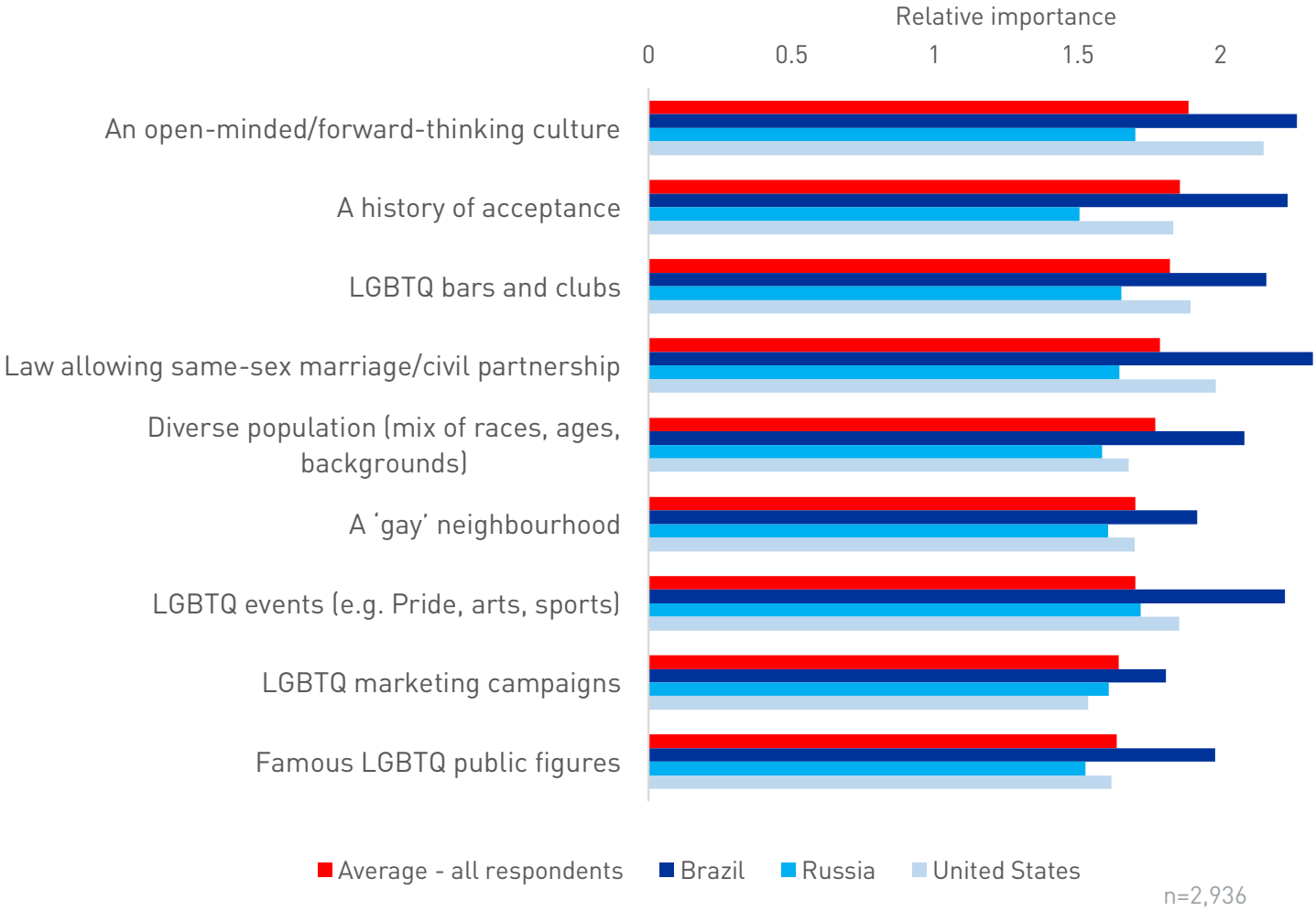
Participants were asked to complete the sentence: "*On my next trip to Europe, I want to...*". They were given 12 options and asked to choose their top three.

On average, the most highly desired activity is to attend an LGBTQ-Pride event, a particularly strong desire for Russian respondents (more than 1 in 4). In Europe, the vast majority of Pride events occur between May and August, when better weather can be expected. Such events can provide a good context for exploring neighbouring destinations, before or after the event. Discovering the nightlife is a particularly strong attraction for Russians and Brazilians (who rated nightlife above visiting a Pride event), while nightlife was less of a priority among American respondents (10%), whose expectations were more balanced.

In general, American respondents trend towards seeking a more refined cultural experience, with a higher than average desire to seek specific monuments or cultural sites, socialise with local people, learn about heritage and treat themselves to high-quality experiences. This may be due to the fact that Pride events and LGBTQ nightlife are relatively visible and widespread throughout the US, offering American travellers ample opportunities for enjoying these at home, with a European vacation reserved for experiences that are more exclusive to Europe as a destination (luxury, heritage and culture).

Brazilians showed relatively high levels of enthusiasm for all aspects of the trip, and trended towards more active vacations (e.g. experiencing daily life or socialising with local people) rather than relaxing or doing activities related to history and heritage.

As an LGBTQ person, how important is it for your chosen destination to have...



Vertical axis scale, rating of relative importance:

0 = not important

1 = somewhat important

2 = important

3 = extremely important

Respondents were presented with a range of aspects of culture and city life that demonstrate LGBTQ acceptance in society and asked to rate how important these were when seeking a leisure destination.

The spread of responses was very balanced, however they do indicate that with the exception of 'hardware' such as LGBTQ bars and clubs, the respondents are more sensitive to signs of social acceptance of LGBTQ people in society, such as 'an open-minded or forward-thinking culture', 'a history of acceptance' and 'a law allowing same-sex marriage or civil partnerships'. These all offer signs that LGBTQ visitors are likely to be welcome, and that it is OK to be LGBTQ and visible in society, at least in the more popular destinations.

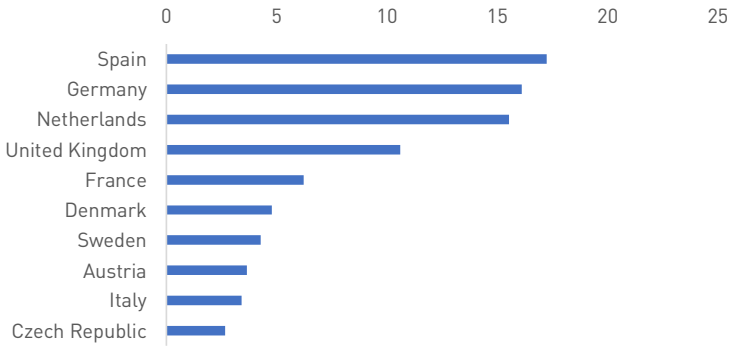
> "With same-sex marriage occupying the subject of much public debate in recent years in the US, the issue has been taken by many in the country as a short-hand' for the general acceptance of LGBTQ people in society."

Brazilian respondents consistently showed greater enthusiasm for all the attractive features presented, while Russians showed the least enthusiasm for all the features, especially the need for a destination to have a generally diverse population. US respondents placed a higher than average importance on destinations that have an open-minded culture, as well as laws allowing same-sex marriage or civil partnerships. With same-sex marriage occupying the subject of much public debate in recent years in the US, the issue has been taken by many in the country as a 'short-hand' for the general acceptance of LGBTQ people in society.

3.7 COUNTRY PERCEPTIONS

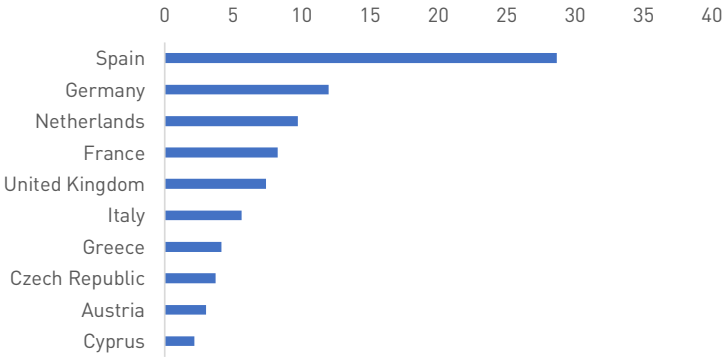
Finally, respondents were asked which European country they felt offered the 'best quality of life for its LGBTQ residents', 'the best overall vacation experience for LGBTQ travellers', and 'the best LGBTQ events and festivals'. Respondents were given a list of the 35 countries covered by this report and asked to choose one country for each category.[40] Responses are presented below by all surveyed markets (Brazil, China, Japan, Russia and the United States), and then a breakdown for three specific markets (Brazil, Russia and the United States).

Which country do you think offers the best quality of life for LGBTQ residents? Top 10 for all surveyed markets (%)



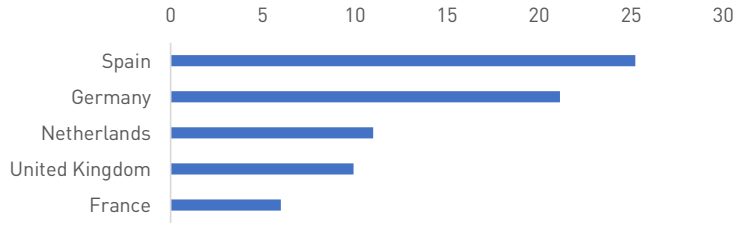
(n = 2,766)

Which country do you think offers the best overall vacation experience for LGBTQ travellers? (%) Top 10 for all surveyed markets



(n = 2,741)

Which country do you think offers the best LGBTQ events and festivals? (%) Top 10 for all surveyed markets

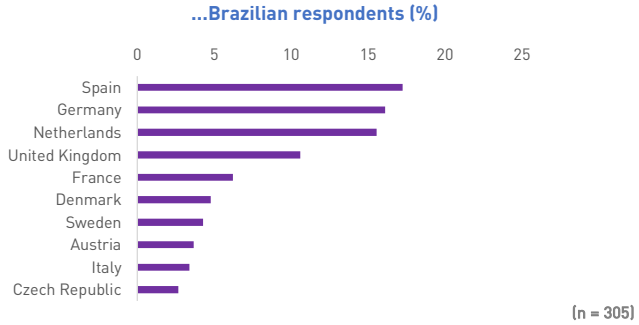


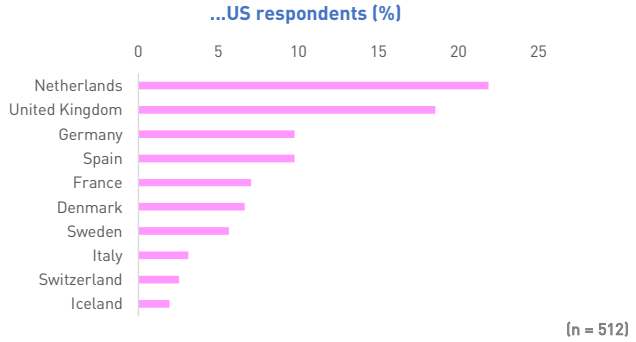
(n = 2,600)

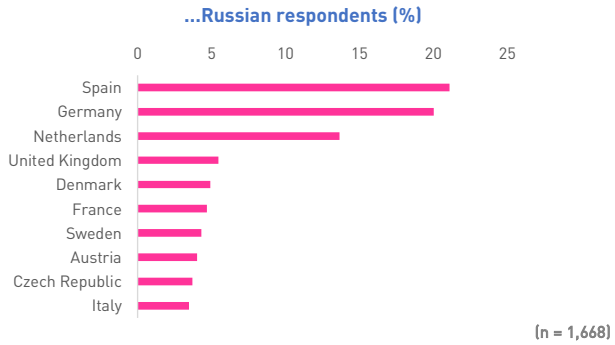
When respondents' answers were considered, Spain was consistently voted as the country offering the best of all categories, outstandingly so for 'the best overall vacation experience for LGBTQ travellers'. Germany, the Netherlands, France and the United Kingdom all consistently occupied the top five positions.

40 A full list of the 35 countries is provided in Annex 1

3.7.1 The top 10 European countries that offer the best quality of life for LGBTQ residents, according to...

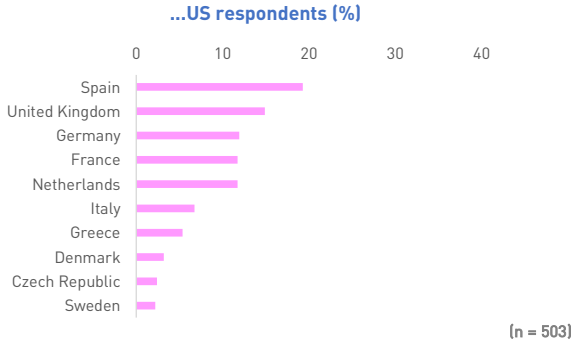


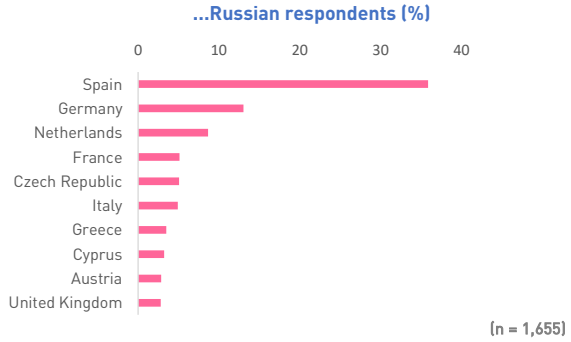




For Brazilian and Russian respondents, Spain and Germany were considered to offer the best quality of life to their LGBTQ residents, with a particularly strong sentiment in this regard among Russian respondents (however the low sample rate for Brazil for this questions suggests that these results should be read with caution). The Netherlands was also rated highly by respondents from all three countries, with US respondents rating it highest, followed by the United Kingdom. France and Denmark were consistently rated in 5th or 6th place by each respondent group.

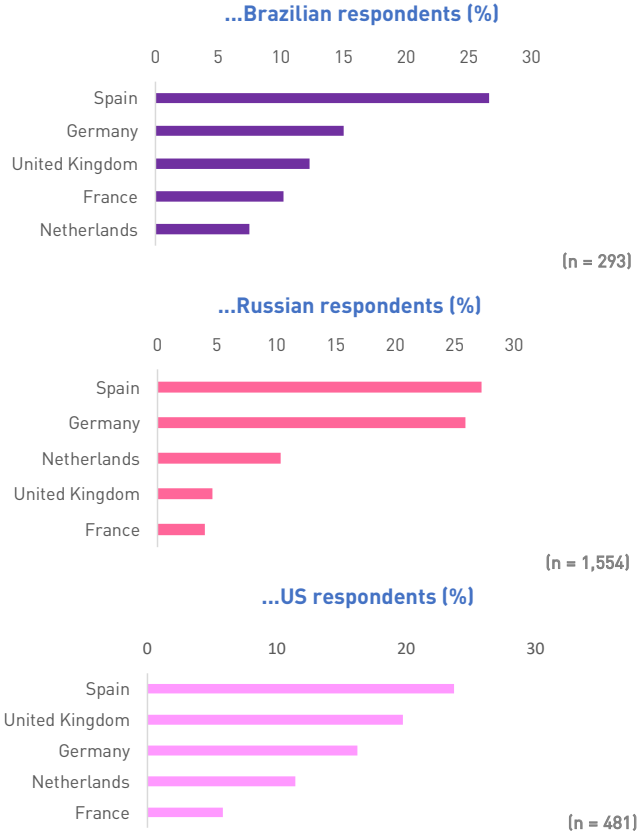
3.7.2 The top 10 European countries that offer the best overall vacation experience for LGBTQ travellers, according to...





Spain was consistently regarded to offer the 'best overall vacation experience' by Brazilian, Russian and American respondents, with Russian respondents showing particular enthusiasm (36% selected Spain, as opposed to Germany, the next-highest ranked by 13% of Russian respondents). The spread of responses was more even among Brazilian and American respondents, who also rated the United Kingdom highly, as well as other countries such as the Netherlands and France.

3.7.3 The top 10 European countries that offer the best LGBTQ events and festivals, according to...



Spain was considered by all groups of respondents to offer the best LGBTQ events and festivals, especially by Brazilian respondents who rated it especially highly (27%). Brazilian and Russian respondents rated Germany in second place for its LGBTQ events and festivals, while US respondents gave second place to the United Kingdom.

Courtesy of Barcelona Pride.

3.8 MARKET OVERVIEWS

In order to gain an understanding of the cultural factors that shape demand by LGBTQ travellers in Europe's major long-haul markets, a series of interviews was carried out with tourism professionals, travel media and experienced travellers in four of the five target markets: Brazil, China, Japan and the United States (an interviewee was sought for Russia, but none was forthcoming). The interviews covered perceptions of Europe as a destination, travel motivations, concerns and recommendations on LGBTQ travel marketing in each outbound market.

3.8.1 BRAZIL

BRAZIL OVERVIEW

Brazil has been a leader in Latin America with regard to LGBTQ rights, and is one of the world's largest nations to recognise same-sex marriage (since May 2013). Brazil's largest cities are home to highly visible and vibrant LGBTQ populations, with major events such as São Paolo Pride (the world's largest) attracting visitors from Brazil and elsewhere. At the same time, inequality and violence in Brazil affect the country's LGBTQ population disproportionately; LGBTQ individuals suffer discrimination and violent attacks, and there is growing concern about the power of evangelical Christian groups fuelling prejudice in the country's political, professional and cultural circles.[41]

BRAZILIAN PERCEPTIONS OF EUROPE AS A DESTINATION

In addition to Europe's attractive landscapes and rich heritage, Brazilian LGBTQ travellers regard Europe as progressive, egalitarian and a comfortable destination to visit, where LGBTQ foreigners will be protected and respected. Europe's history and culture make it a highly aspirational destination, associated with romance and exploration. In line with Brazilian travellers in general, visits tend to be based in and around major cities, with short excursions to nearby attractions. Lisbon, Madrid, Barcelona and Paris are favoured destinations for a first visit, followed by cities such as London, Rome, Berlin and Stockholm. Events such as Pride and vibrant nightlife are seen as a major attraction, and a good context for booking a trip.

> "Brazilian LGBTQ travellers regard Europe as progressive, egalitarian and a comfortable destination to visit, where LGBTQ foreigners will be protected and respected."

In terms of barriers to travelling to Europe, various interviewees mentioned low English language skills restricting Brazilians' travel ambitions, and highlighted the need for tourism suppliers in Europe to provide basic information in Portuguese. Economic concerns are also top-of-mind for Brazilian travellers, who consider factors such as the exchange rate, extra charges and internal travel carefully while making their travel plans. However one interviewee highlighted that Europe is often perceived (unfairly) in Brazil as a luxury destination, only accessible to the very rich.

When approaching the Brazilian LGBTQ market, tourism suppliers should be aware of its potential (despite recent economic problems in the country), as Europe is still a highly desirable destination. NTOs and tourism suppliers should project a more friendly and simplistic image of Europe, open to travellers of all budgets. Brazil has a youthful population, so using images of younger Europeans in marketing content should be effective as well as enlisting the help of Brazilian influencers and travel media for destination promotion.

41 Long, C., (2017) *Brazil is accused of stripping away LGBT rights* (13-10-2017), Public Radio International, available at www.pri.org

3.8.2 CHINA

CHINA OVERVIEW

Based on the volume of Chinese outbound travel alone, China should offer considerable potential as a source market for the LGBTQ segment. A very conservative estimate (based on 3% of the overall population) puts China's LGBTQ population at nearly 50 million. However as a country in rapid development, and where discussion of inequality, discrimination and human rights faces official restrictions, understanding and marketing to Chinese LGBTQ consumers is a complex issue. China decriminalised homosexuality in 1997 and removed it from the official list of mental disorders in 2001, however traditional family expectations surrounding marriage and children still prevail, and a lack of legal protection against discrimination on the basis of sexuality makes it difficult to come out. [42]

There is little official hostility to LGBTQ groups in China, however they are expected to focus on aspects such as 'social harmony' and healthcare, as opposed to revendicating rights in the public sphere.[43] Instead, China's LGBTQ population is flourishing online, through Weibo, WeChat and dating apps such as Blued. Western content (images, videos, movies, news) featuring same-sex couples and LGBTQ issues are widely shared, helping to create a good level of understanding about LGBTQ life outside of China, particularly in Europe.[44]

CHINESE PERCEPTIONS OF EUROPE AS A DESTINATION

In light of the factors outlined above, the common perception among the Chinese LGBTQ population is that Europe is the 'friendliest' destination for LGBTQ travellers. In addition to news on issues such as same-sex marriage, images and video from major Pride events in European cities (produced by European media and by Chinese visitors) have been shared widely. This, combined with Europe's general attractions for the Chinese outbound market (culture, history, fresh air, pristine landscapes), make Europe a highly aspirational destination for Chinese LGBTQ travellers.

> "There is a lack of practical information in Chinese about LGBTQ events and attractions in European destinations, so organising such a trip requires a considerable amount of planning."

In reality, most LGBTQ Chinese are likely to experience some aspect of LGBTQ life in Europe (such as visiting a club, bar or event) while visiting as part of an organised tour. For those who are more confident or can afford it, visiting a Pride event with a group of friends is another common option. There is a lack of practical information in Chinese about LGBTQ events and attractions in European destinations, so organising such a trip requires a considerable amount of planning.

In line with Chinese travellers in general, France and Italy, France and Spain, and the Alpine countries are popular destinations for LGBTQ travellers, however Prague and Mykonos are gaining attention as gay-friendly destinations for those who are more adventurous. Some European countries that allow foreign citizens to marry, such as France or Spain have also become popular destinations for Chinese same-sex couples wanting to hold a wedding ceremony, despite same-sex marriages not being officially recognised in China.

Aside from general concerns such as the cost of travelling to Europe and personal safety, cultural factors from home can create barriers to travel. Chinese LGBTQ travellers may be apprehensive about disclosing their sexuality, for example when asking about bars or clubs to visit, or when checking into hotels as a same-sex couple. It is important for tourism suppliers to take this into account, and to recognise the high level of warmth and courtesy of service that Chinese visitors expect.

When approaching the Chinese LGBTQ market, tourism suppliers should focus on promoting diversity and social harmony, as explicit discussion of LGBTQ rights could attract official scrutiny. Video and image content for the mainstream Chinese market that features same-sex couples and LGBTQ culture can be extremely effective, as well as supporting cultural events such as LGBTQ arts festivals hosted in embassies and consulates in China. Destinations should also work to address the lack of Chinese-language (or even English-language) information about events such as Pride, LGBTQ nightlife and other cultural attractions.

42 Chen, S., (2018) *China's complicated LGBT movement* (01-06-2018), The Diplomat, available at: www.thediplomat.com
43 Palmer, J. (2018) *It's still (just about) OK to be gay in China* (17-08-2018), Foreign Policy, available at: www.foreignpolicy.com
44 Bu, Z., (2016) *It's actually OK to be gay in China online, just don't ask for equal rights IRL* (09-09-2016), Quartz, available at: www.qz.com

3.8.3 JAPAN

JAPAN OVERVIEW

Compared to its regional neighbours, Japan is relatively progressive with regard to recognising the rights of its LGBTQ citizens. Homosexuality is legal; however in practice, LGBTQ people frequently face discrimination in various areas of daily life such as the workplace, and in access to housing and healthcare. Strongly entrenched attitudes towards gender roles and the family make it difficult for LGBTQ people to be fully open in Japanese society, and the media has reflected a social reticence in Japanese society to discussing issues of sexual orientation and gender identity openly.

Nevertheless, awareness of the challenges that LGBTQ people face in Japanese society has gradually increased. In 2012 the first Rainbow Pride was celebrated in Tokyo, and in April 2015, Tokyo's Shibuya Ward introduced Japan's first ordinance recognising same-sex partnerships.[45]

In 2017 the LGBT Research Institute Japan carried out a survey of 800 LGBTQ people in Japan. The research gathered insights from individuals who identified themselves as lesbian, gay, bisexual or transgender (200 responses per identity). The study is currently only available in Japanese; however some findings are summarised below:

- Average expenditure on travel per year: 2,300 USD (1,800 EUR)
- 19% of respondents travel overseas for leisure more than once per year
- 90% of respondents expect to spend more of their personal income on travel in the coming years
- Nearly 20% of respondents have silver, gold or platinum level status with an international airline
- 16% of respondents travel alone, around 50% with a romantic partner, and 32% with friends
- For gathering information about their trip, 52% of respondents rely on TV programmes, 36% from online sources and around 20% use walk-in travel agents for assistance with their holiday plans
- The relatively short periods of annual leave taken by Japanese workers seriously affects the length of time that may be considered for international leisure travel

JAPANESE PERCEPTIONS OF EUROPE AS A DESTINATION

The Japanese expert interviewed for this Handbook (Mr Shintaro Koizumi) highlighted that for LGBTQ people in Japan, in line with the general population, Europe is held in high regard, and is relatively well-known. While no European destinations appear to have carried out specific LGBTQ marketing activities directed at Japan to date, destinations with major LGBTQ events stand out, in particular Germany, Spain and the UK. Europe is generally seen as a comfortable and easy place to visit as a same-sex couple, at least in comparison to travelling in Japan.

The lack of time available for holidays restricts the amount of exploration that Japanese travellers can do in Europe, though the summer is a popular time to visit, especially to join Pride events. Prospective Japanese LGBTQ travellers to Europe find it hard to plan trips such as this, given the lack of information in Japanese about such events. Even basic information would allow visitors to plan a European travel itinerary in advance.

45 Kaku, S (2015) *Rainbow in the East: LGBT rights in Japan* (28-05-2015), Nippon.com

3.8.4 RUSSIA

Today, discussion of modern Russia and its relationship with the West rarely occurs without some reference to the official hostility on the part of the Russian State towards its LGBTQ citizens. Homosexuality was decriminalised in Russia in 1993, however today, anti-gay prejudice in the country is widespread. Two decades later, with the Russian Parliament's 2013 approval of a law declaring "propaganda of non-traditional sexual relationships" among minors an offence, Russia was widely perceived to have taken a backward step with relation to LGBTQ rights. This has continued with the visibility of LGBTQ people in society gradually becoming reduced, as the media has shied away from addressing LGBTQ issues and events such as Pride have been outlawed.

Nevertheless, social media and dating apps are enabling LGBTQ Russians to meet in real life, and also follow events outside of Russia. However the present environment and the 'Propaganda' law in particular make it a complicated place in which to openly target LGBTQ consumers through marketing campaigns.

RUSSIAN PERCEPTIONS OF EUROPE AS A DESTINATION

Anecdotal evidence, as well as consumer research for this Handbook suggests that Europe is regarded very positively as a destination for LGBTQ Russians. The close relative proximity to Moscow and St Petersburg to cities such as Berlin, Munich and Amsterdam, as well as the general popularity of Spain and Italy as summer destinations for the Russian market mean that Russians have a close cultural affinity with Europe. Compared to Asian destinations such as Thailand and Vietnam, Russians travelling to EU countries require a visa; however the consumer research for this Handbook did not suggest that gay Russian travellers saw this as an obstacle to visiting.

3.8.5 UNITED STATES

The spending power of American consumers in general, combined with the visibility and vibrancy of LGBTQ consumers in American society, make the United States the world's most powerful market for LGBTQ outbound travel. One estimate in 2016 valued the buying power of LGBTQ consumers in the United States at US $917 billion, and in recent years, American multinational companies have played a leading role in global LGBTQ corporate advocacy.[46]

Yet in a similar way to most advanced economies, the United States' LGBTQ population is highly concentrated around major cities (indeed, cities such as New York and San Francisco are often regarded as the birthplace of the LGBTQ rights movement globally), as well as popular vacation destinations. In a large, highly diverse country, the visibility and quality of life of LGBTQ Americans varies considerably, from city to city and state to state. Furthermore, issues such as same-sex marriage or the rights of transgender individuals to change their gender, or use public bathrooms according to the gender they identify with continue to polarise public opinion, particularly in more conservative areas. Questions remain over the stance of the present US administration on LGBTQ rights, and its preparedness to sustain the level of progress achieved to date.

AMERICAN PERCEPTIONS OF EUROPE AS A DESTINATION

Given the size and the dynamism of the US outbound LGBTQ market, inevitably American perceptions of Europe as a destination will vary widely. The experts interviewed for this Handbook (five out of six of whom were specialists on the lesbian segment) highlighted that Western Europe is perceived as very socially progressive (especially when compared to the present political climate in the US), and generally able to offer a safe, friendly welcome to LGBTQ travellers. Eastern and Central Europe were either perceived less positively, or unknown.

Above all, Europe is strongly associated with heritage and culture, and the opportunity to combine this with appreciation of good food and good weather - particularly in countries such as Greece, Italy, Portugal and Spain. The association of these countries with romance makes them appealing for major celebrations such as honeymoons and anniversaries. However, various interviewees pointed out the restricted amount of vacation leave available to US consumers and the strong competition offered by destinations in the US, in the Caribbean and Latin America.

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

3.9 INSIGHTS ON LESBIAN TRAVELLERS

As discussed in section 3.1, reaching a balanced, representative sample of the LGBTQ population poses a challenge to researchers, especially in countries where the LGBTQ population is less visible, and cultural factors make it difficult to discuss issues of sexual orientation, gender identity or gender expression. Given the time and resources available, and that the principle method for distributing the online consumer survey was through a social network that is most popular among gay men, the total number of respondents who defined themselves as lesbian or bisexual women reached was low (n = 83).

The author sought to mitigate this imbalance by seeking qualitative data through personal interviews. A total of eight women from Brazil, China and the United States were interviewed. All women were preselected due to their professional background in lesbian-specific marketing and/or extensive travel experience. These women are thus able to identify common patterns of lesbian consumer behaviour within their respective countries, and comment on these with some degree of authority.

That said, at this stage it is important to underline that lesbian travellers globally are not a homogenous group any more than gay men, bisexuals or transgender travellers are. Lesbian travellers are extremely diverse, and as with other segments, their travel behaviour is largely defined by personal values, preferences and circumstances.

Furthermore, there was a general consensus among the women interviewed that lesbians are generally less visible in society than gay men and therefore even less easy to understand and define. Public events such as Pride, B2B LGBTQ tourism events and LGBTQ media channels attract a larger share of gay men than lesbians, and feature products and services of more interest to men as a consequence.

Various interviewees also pointed out that understanding women better as consumers of travel (whatever their sexual orientation), and designing products and marketing messages that cater to their interests and desires is a pending task for the tourism sector.

3.9.1 Key patterns of consumer behaviour in lesbian travel

Based on the eight in-depth interviews with lesbian or bisexual women carried out for this Handbook, the following patterns of consumer behaviour have been identified as important when considering the lesbian segment:

Figure 5: Overview of key patterns of consumer behaviour in the lesbian travel segment

Female first:

First and foremost, lesbian travellers are female travellers, and this can influence travel decision-making in a variety of ways. In certain outbound markets where gender roles are more traditional, expectations of women to get married and have children can affect lesbians and influence whether they get to travel at all.

When selecting a destination and while visiting, issues such as personal safety, cultural attitudes towards women and modes of dress expected of women in the destination are more likely to affect decision-making than is the case for men. Interviewees reported that on this basis, compared to other regions, Europe – particularly Western Europe - is generally perceived by lesbians in Europe's major long-haul markets as a safe place to visit.

Female identity is an important theme for many lesbians, who will pay closer attention to the role of women in local culture and prominent women in local society, whether they are lesbian or not.

Seeking value and independence in travel planning

As women, statistically, lesbians are more likely to earn lower wages than men (a pattern that is repeated in both advanced and emerging outbound markets). This will inevitably affect travel planning and make lesbians more value-conscious when planning a holiday, which may especially be the case if they are planning the holiday with children in mind. Some studies have found however, that lesbians earn between 6%-9% more than heterosexual women which can mean even higher spending power in the case of female couples.[47]

Several interviewees concurred that lesbian consumers tend to prefer to handle their own holiday plans, rather than rely on the services of a travel agent. This may also be due to the fact that travel agents and tour operators explicitly targeting the lesbian market are extremely scarce. The lack of structured travel products on the market for lesbians may also explain lesbians' preference for travelling with pre-arranged groups of friends or family (as opposed to seeking out friends or partners in the destination).

47 Washington Post (2016), *The surprising reason why lesbians get paid more than straight women* (25-02-2016), available at washingtonpost.com

Time together

'Spending time together' was a common theme in lesbian travel expressed by all interviewees. By comparison to gay men, 'forming a couple and settling down' seems to be a greater priority among lesbians, and this influences the type of experiences that couples seek when they travel (indeed, lesbian travel was mostly discussed in terms of female couples, as opposed to solo-travellers).

According to Cathy Yang, a marketing professional from Beijing, "for women, the process of starting a relationship can be different, with more emphasis on communication and intimacy than sometimes appears to be the case among gay men [...]. It seems that lesbians [in China] are more focussed on community, intimacy, peer support and friendship, with a preference towards travelling with a group of close friends as opposed to travelling with or meeting up with strangers."

Whether on an active or relaxing vacation, travel is regarded as a valuable opportunity to spend time together. This is especially true for couples who, due to cultural factors find it difficult to spend time together as partners at home. As such, hotels and resorts offering intimacy and seclusion are popular, as well as activities that can be done as a couple.

Balancing culture and adventure

Lesbian interviewees from the United States concurred that lesbians are strongly attracted to visit Europe given the opportunities that it offers to mix culture with adventure (both in the sense of exploration, and occasionally in the sense of soft adventure sports such as walking or cycling). The opportunity to engage in local culture by meeting local people, engaging in activities such as cooking, painting, creative writing or drama were also mentioned (i.e. enriching activities with an active element, and a focus).

Community and social conscience

Coupled with the theme of value and independence, among lesbian consumers there appears to be a heightened interest in 'spending with a conscience', i.e., spending money in destinations and with suppliers that are known to have a good record on human rights, environmental protection, LGBTQ equality and other indicators. Furthermore, two interviewees highlighted lesbians' stronger sense of an 'LGBTQ community' than is the case of gay men, and heightened interest in the political issues affecting it, and other minority groups.

Family focus

Estimates from the 2010 US Census suggest that there are nearly 650,000 same-sex couples living in the country. Data from a 2011 analysis show that an estimated 19% of same-sex couple households include children under age 18. This is true for 27% of female couples and nearly 11% of male couples.[48] This means that a significant share of lesbians approach their travel plans as a family, and thus are likely to travel closer to home. Meanwhile, lesbians with older or no children are likely to travel further afield. Various interviewees pointed out that Europe is viewed by US lesbians as an ideal destination for celebrating 'milestone events' such as important birthdays and anniversaries with friends and older family members.

Preferred destinations:

Interviewees were asked about popular countries to visit in Europe, and popular combinations of countries that resonate with the lesbian market segment. Given the low sample size, it is difficult to draw any representative picture, however the following countries and combinations were cited, with reasons given where relevant:

- **Spain, Portugal and Greece**: Attractions offer good value for money, strong mix of culture and heritage. Associated with romance and milestone celebrations.
- **Italy**: Fine arts and gastronomy, strong association with romance.
- **Nordic countries and Iceland**: Strong ethos of equality and social justice, heritage of advancing women's rights. Opportunity for 'off the beaten track' exploration.
- **UK and France**: Long-term favourites, popular with first-time lesbian visitors to Europe.

48 Gates, J., (2013) *LGBT Parenting in the United States*, The Williams Institute, February 2013, p.2

3.9.2 Recommendations on marketing and product development for the lesbian segment

- According to lesbian travel influencer Meg Cale, "if you build it, they will come". Travel businesses or destinations that make a credible, authentic approach to the lesbian market stand to win considerable loyalty as there is currently so little on offer, especially for the younger crowd who seek to meet, make friends, find a partner and have fun.

- Las Vegas provides a good example of a destination which has shown a commitment to attracting the lesbian market by producing credible eye-catching campaigns for a number of years. In May 2018, under the 'Only Vegas Moments' campaign, the Las Vegas Convention & Visitors Authority (CVA) released a short film based on a female couple, titled 'Then and Now' to promote weddings in the city. As of July 2018, the video has had more than 9.2 million views. According to Cathy Tull, Chief Marketing Officer of Las Vegas CVA, "the campaign celebrates the long-standing promise of adult freedom in Las Vegas by embracing contemporary storylines that are relatable to a wide range of potential visitors".[49]

- When destination marketing organisations plan visits for lesbian influencers and travel media, it is important to think seriously about planning visits, meetings and tours that are lesbian-specific, rather than group lesbians on a gay-male focussed itinerary. Points of interest may include:

  - Local lesbian nightlife and events

  - Meeting lesbians who play a prominent role in the local community

  - Visiting venues that are female-specific or LGBT-owned (e.g. women's centres, feminist book clubs. Lesbian-owned businesses or coffee shops and restaurants that are popular with the local lesbian community

- When creating content and campaigns targeted at lesbians, use lesbians in photoshoots and videos (women who are authentic, as opposed to models), and marketers should generate their own imagery, rather than use stock photo shots of lesbians. If it is difficult to find models, work with partners such as event promoters to recruit them, but most of all, take the time to work with women who can tell a story and speak from experience, such as lesbian influencers and other marketing professionals. As with content in general, lesbian content should be supported by search engine optimisation (SEO) to ensure that it stands out

49 SBS Australia (2018), *Las Vegas tourism commercial celebrates same-sex wedding* (25-02-2018), available at sbs.com.au

3.10 INSIGHTS ON TRANSGENDER TRAVELLERS

While global acceptance of lesbian and gay people in society has undergone some significant shifts forward in recent decades, understanding and acceptance of transgender people has lagged behind. Nevertheless, over the past two to three years, a combination of work by LGBTQ non-governmental organizations, public debate and greater visibility have helped to drive a gradual increase in public understanding of what it means to be transgender.[50] This is important, because globally, people who seek to change the gender that they were born with, or do not wish to conform to one gender or the other, still face considerable stigma at home, in the workplace and in daily life.

According to the Williams Institute, 0.6% of adults (or 1.4 million individuals) in the US identify as transgender.[51] In the online consumer research conducted for this Handbook, just under 1% (0.82%) of respondents defined themselves as a transgender man (female to male, 'FTM'), or transgender female (male to female, MTF).

According to a survey conducted in 2014 by Community Marketing Inc. among nearly 700 transgender travellers in the United States, 54% of those surveyed defined themselves as economy or budget travellers, 48% of museum or cultural travellers, and 45% as city or urban core travellers. 62% said they generally travel alone, while 49% regularly travel with their partner or spouse. More than 1 in 4 (29%) said they travel with LGBT friends.[52]

What do the terms 'trans' and 'intersex' mean?

"*Trans* is an inclusive umbrella term referring to those people whose gender identity and/or a gender expression differs from the sex they were assigned at birth. Gender identity is how we see ourselves; an internal and personalised perception of our own gender. This may differ from the sex we were assigned at birth or how society might label us. The term trans includes but is not limited to: men and women with transsexual pasts, and people who identify as transsexual, transgender, transvestite/cross-dressing, androgyne, polygender, genderqueer, agender, gender variant or with any other gender identity and/or expression which is not standard male or female and express their gender through their choice of clothes, presentation or body modifications, including undergoing multiple surgical procedures."

"*Intersex* people are born with physical, hormonal or genetic features that are neither wholly female nor wholly male; or a combination of female and male; or neither female nor male. Many forms of intersex exist; it is a spectrum or umbrella term, rather than a single category. An intersex individual is born intersex. [...] Intersex differences may be visibly apparent at birth. Some intersex traits become apparent at puberty, or when trying to conceive, or through random chance."

Source: 'The Definition: What is trans? What is intersex?' – ILGA Europe (available at www.ilga-europe.org)

Travelling as a transgender person

Transsexual travellers value above all a welcoming environment, where they are respected and treated according to the gender to which they identify. Nevertheless, this is far from guaranteed, even when travelling in countries where public opinion is more accepting of LGBTQ people in society as a whole.

50 Ibid UWNTO, p.76
51 Williams Institute 2016, *How many adults identify as transgender in the United States*, UCLA School of Law, June 2016, available at ucla.edu
52 CMI/GFLCVB (2014), *Welcoming the transgender traveller*, Overview report, August 2014, p.8-10

An interview for this Handbook was conducted with Bella, Thanakarn Vongvisitsin, a doctoral student of the Hong Kong Polytechnic University, and Vice President of the ILGA Asia Foundation. Bella is a transgender woman and activist, and has worked with a wide range of public, private and civil society organisations. During the interview, Bella highlighted the following issues:

- For transgender individuals, travelling can occasionally present moments of severe anxiety. For example, official document checks when boarding flights and arriving at passport control can be stressful, as the gender stated on the traveller's passport may not match the person's appearance. Airport security searches can be invasive and humiliating. Officials may be untrained in how to deal with this, and may ask rude or inappropriate questions.[53]

- This assertion is supported by a survey conducted by Community Marketing Inc. among nearly 700 transgender travellers in the United States. 33% of those who said they did not enjoy travelling by plane said that this was due to pat-downs or body searches, 31% due to body scans, and 22% due to ID document issues. Furthermore, the greatest concern when travelling (among 45% of respondents), was that of the threat of physical or verbal violence.

- In response, some countries such as Canada allow for an additional 'X' gender category, while sensitivity training among officials and tourism suppliers is essential. Often, tense situations can be overcome with a calm, friendly approach and a simple question asking, "which gender do you prefer to be treated as?"

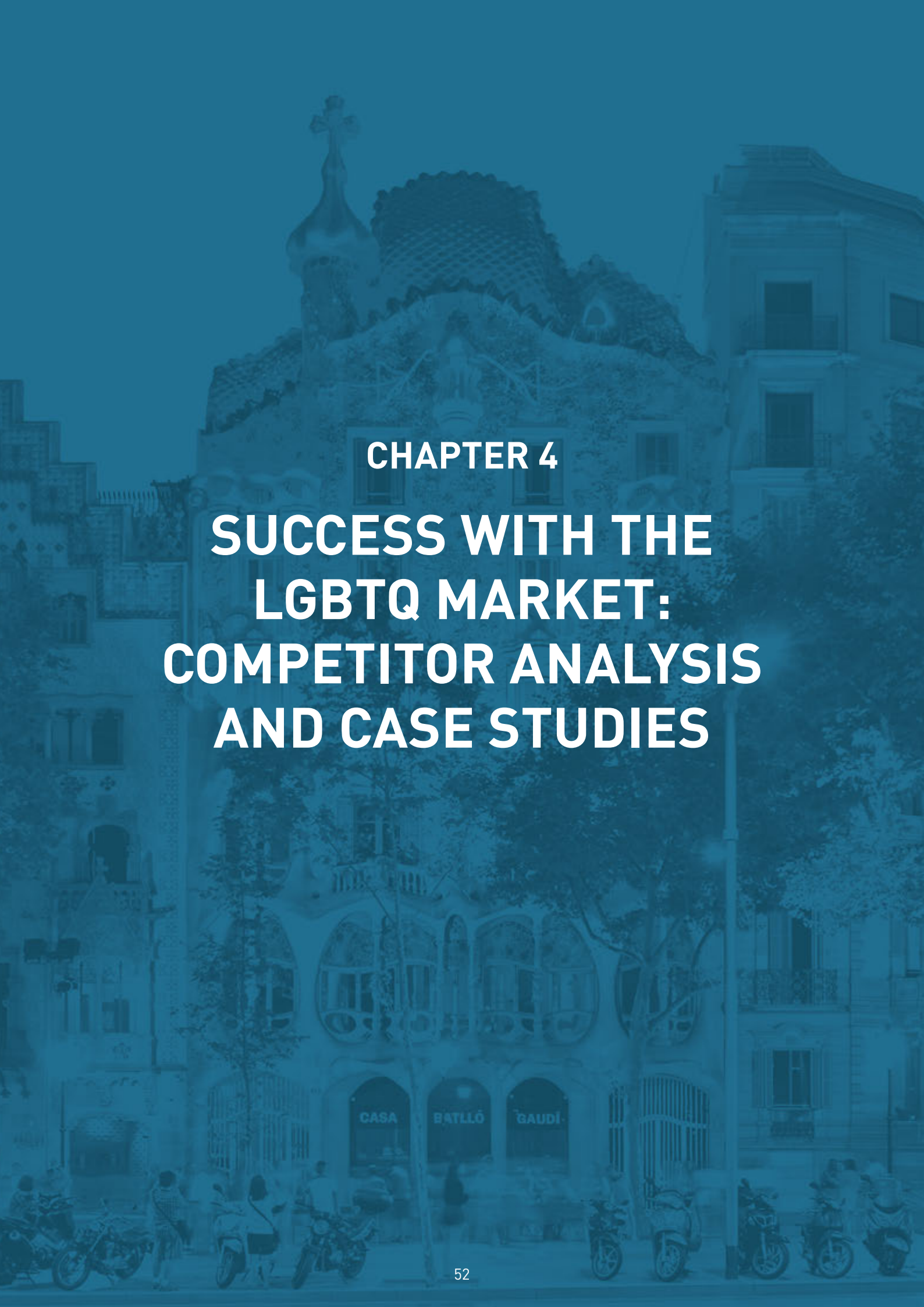
- Appearances and ways of dressing may vary as a transsexual person undergoes their gender reassignment process. This may conform to their gender at birth, or with the gender with which they most closely identify. It is important for service staff not to make assumptions, or to create a tense situation when questioning personal details.

- When applying for visas, transgender people often seem to be unfairly treated, i.e. asked for more evidence of financial situation than others or stereotyped as attempting to move abroad when in fact, they are simply wishing to travel for a holiday

- Marketing to transgender consumers can be challenging. On one hand, the media is proving to be helpful and influential in representing transgender people and discussing the issues that they face. Transgender visibility is also to be welcomed, as a sign of integration and acceptance. However, it is also important to appreciate that many transgender people prefer to live their lives discreetly, maintaining a low profile, seeking to 'fit in' and be accepted as much as possible. This means that while the gesture of providing additional (i.e. third) gender neutral bathrooms is well-meant, some transgender people may be reluctant to use them for fear of calling attention to themselves.

- For tourism suppliers, the best approach is to offer a safe, welcoming environment where staff are well-trained.

53 Ibid CMI/GFLCVB



CHAPTER 4

SUCCESS WITH THE LGBTQ MARKET: COMPETITOR ANALYSIS AND CASE STUDIES

4.1 BACKGROUND TO THE COMPETITOR ANALYSIS: UNDERSTANDING THE FACTORS THAT SHAPE THE PERCEPTION OF LGBTQ DESTINATIONS AMONG POTENTIAL VISITORS

As the research for this report has shown, LGBTQ consumers in Europe's major source markets take seriously a destination's perceived level of openness, acceptance and 'friendliness' towards LGBTQ residents and visitors.

However, there is a range of factors that may characterise a destination as being particularly friendly or welcoming to LGBTQ travellers. LGBTQ travel media frequently present articles such as the 'Top 10 gay destinations for 2018' or 'Top 10 gay events for 2018' featuring both mature and emerging destinations around the world. Consumers wishing to take a more analytical approach to evaluating a destination may consult resources such as the ILGA Rainbow Europe Map of 49 European countries (based on how the laws and policies of each country impact the lives of LGBTQ people, in areas ranging from equality, family issues and hate speech to legal gender recognition, freedom of expression and asylum rights; the Spartacus Gay Travel Index or the DestinationPride tool.

The Rainbow Europe Map and the DestinationPride tool are explained in the adjacent boxes.

Rainbow Europe brings together both the legal index of LGBTI equality based on the Rainbow Europe Map and an overview of the social climate for LGBTI people in each country based on IGLA-Europe's Annual Review of the Human Rights Situation of Lesbian, Gay, Bisexual, Trans and Intersex People in Europe.

Rainbow Europe ranks all 49 European countries on a scale between 0% (gross violations of human rights, discrimination) and 100% (respect of human rights, full equality). The organisation ranks the countries on the basis of laws and policies that have a direct impact on the LGBTI people's human rights under 6 categories: equality and non-discrimination; family; bias-motivated speech/violence; legal gender recognition; freedom of assembly, association and expression; and asylum.

The rankings are based on how the laws and policies of each country impact on the lives of LGBTI people. The ranking records a country's legal standards for comparison with its European neighbours, but the numbers only provide one part of the story. ILGA-Europe's Annual Review gives a more nuanced, detailed overview of every country's progress over the last twelve months and has a chapter dedicated to each country as well as developments at international level. ILGA-Europe tracks each country using a wide range of indicators; covering everything from equality, family issues and hate speech to legal gender recognition, freedom of expression and asylum rights. These benchmarking measures were first used by ILGA-Europe in 2009 and have been expanded ever since.

-I nformation supplied by IGLA-Europe

DestinationPride

From its work as a peer-to-peer not-for-profit supporting the LGBTQ+ community, PFLAG Canada knew that inequalities are both widespread and vary widely from place to place, and there is no easy way to understand and compare the level of LGBTQ acceptance for destinations around the world. Destination Pride was developed to draw attention to the fact that these inequalities still exist - and to make it easy for the LGBTQ+ community to navigate them.

Using the tool, users may search for any place on earth, and find how it scores according to LGBTQ laws, rights and social sentiment. Data related to laws are updated as laws change in each jurisdiction, usually within a few days of a new law being passed. Social Sentiment is updated approximately every five minutes, and monitors global social media platforms to calculate an average level of positive or negative sentiment regarding LGBTQ issues expressed through social media platforms in the city, state, province or country applicable over the past 90 days.

The key drivers of the score are:

- **Marriage equality** – Is same-sex marriage illegal, are some same-sex unions recognised or is marriage fully legal?

- **Sexual activity laws** – Are same-sex relations legally protected in the country, state or province ? Do laws have full, limited, or no protections over same-sex intercourse and/or other sexual activities?

- **Gender identify protections** – Are legal protections in place to protect the right to sex reassignment surgery, and/or hormone replacement therapy in the country, state or province applicable? Accordingly, this data may indicate that destination's progressiveness towards freedom of gender identity and/or expression

- **Anti-discrimination laws** – Are there specific legal protections and LGBTQ+ rights generally, and for housing and employment in the country, state or province applicable?

- **Civil rights & liberties** - Are there additional legal rights extended to the LGBTQ+ community, including equal qualifications for military service, blood donation, and adoption? Is conversion therapy banned?

The most common "anomaly" is the expectation that "gay positive" destinations such as San Francisco or Toronto will have extremely high scores, but like most places there is still work to be done to achieve true equality. For example, many progressive jurisdictions still restrict blood donation, military service and adoption in some way. Others have not passed laws to ban conversion therapy. The most impactful way for a destination's score to improve is through the introduction of progressive laws.

- Information supplied by FCB/SIX and PFLAG Canada

4.2 THE LGBTQ TRAVELLER'S DILEMMA

Some LGBTQ travellers may still choose to visit countries where they, or the local LGBTQ population may face discrimination for openly revealing their sexual orientation or alternative gender identity. In order to avoid problems while travelling in countries that discriminate against LGBTQ people, LGBTQ travellers often choose to be more guarded about revealing their sexuality or gender identity to strangers or tourism service staff. Nevertheless, there is a lively debate within the LGBTQ travel industry over whether it is morally right for LGBTQ travellers to visit such countries at all.

For its part, 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 LGBTQ people working and living there outweighs the cost to the business or destination from lost revenue.[54]

4.3 MATURE VS. EMERGING DESTINATIONS

Globally, there is a crude division between destinations which are 'mature', and those which are 'emerging' (indeed, Europe itself includes a wide range of destinations that could be categorised in this way).

Mature LGBTQ destinations:

- Have a reputation for LGBTQ inclusion and diversity that has developed over a series of decades
- Are home to iconic gay districts and events
- Have demonstrated a long-term commitment to the LGBTQ segment through sustained marketing actions over a number of years

Emerging LGBTQ destinations:

- Have seen recent changes in the law towards granting equal rights to LGBTQ people, signalling a cultural shift towards acceptance of LGBTQ people in society
- May attract the attention of LGBTQ travellers by establishing a new LGBTQ events, feature in films/TV or a new LGBTQ marketing campaign
- Be a destination which has seen a rise in visitors in general, and while lacks a discernible LGBTQ heritage, visible local LGBTQ population or specific attractions, is able to assure a generally safe and accepting environment for LGBTQ travellers

54 Ibid UNWTO (2017), p.62

4.4 EUROPE'S MAIN COMPETITORS FOR THE LGBTQ SEGMENT

On a global level, LGBTQ travellers in Europe's major source markets face a choice between mature and emerging destinations. As the research for this report has demonstrated, the eventual choice of destination will also be heavily influenced by general factors, such as language, climate, exchange rate, ease of access and range of cultural attractions on offer.

Table 2: Overview of Europe's competitor destinations, by outbound market

Outbound market	LGBTQ destinations alternative to Europe
BRAZIL	**North America**: Mexico, United States **South America**: Argentina, Colombia
Mainland CHINA	**Asia**: Taiwan, Hong Kong, Thailand, Vietnam, Japan **Australia, New Zealand**: Sydney, Melbourne, Auckland **United States**: Los Angeles, San Francisco, New York, Miami, Dallas **Canada**: Vancouver, Toronto
JAPAN	**Asia**: Taiwan, Hong Kong, Thailand, Vietnam **Australia, New Zealand**: Sydney, Melbourne, Auckland
RUSSIA	**United States, Canada** **Israel** (Tel Aviv), Turkey (Istanbul) **Asia**: Thailand, Vietnam
UNITED STATES	**North America**: Mainland United States (and Hawaii), Canada (Vancouver, Toronto, Montreal), Mexico **Caribbean**: Curacao, Cuba **South America**: Argentina, Brazil, Colombia, Peru **Asia**: Thailand **Africa**: South Africa

4.5 PERCEPTIONS OF EUROPE VS. COMPETITOR DESTINATIONS

Based on opinion given in the interviews conducted for this study, the following broad perceptions were shared on visiting Europe as a LGBTQ traveller, vs. other destinations (in particular Asia and the Americas):

Table 3: Overview of LGBTQ-specific and general strengths and weaknesses of Europe vs. competitor destinations

LGBTQ-SPECIFIC	
STRENGTHS	WEAKNESSES
• "The most liberal, gay-friendly, socially progressive destination" • Good level of social equality • Many counties with a record of protecting rights for LGBTQ citizens • Iconic and unique LGBTQ events (e.g. Madrid World Pride, Amsterdam Canal Parade) • Easier to visit as a same-sex couple than at home (especially for visitors from China, Japan and Russia) • Satisfaction with spending one's money in somewhere where LGBTQ rights are respected • Unique mix of ancient history and modern values • Possibility to combine history and culture with gay nightlife in cities • Highly permissive nightlife/gay scene catering to niches • Relatively safe for transgender and solo female travelle	• Uncertainty over the reality of being openly gay or lesbian while travelling in parts of Central/Eastern/Southeast Europe (e.g. reactions to same-sex couple kissing, or holding hands in the street) • Concern about travelling as a same-sex couple or transgender person and dealing with the authorities (e.g. questioning by police or border agents from another culture/language) • Good news about progress on LGBTQ rights in Europe rarely filters through in the US/ Brazil • The most visible gay destinations often seem oriented strongly toward the gay male market, with little to offer lesbians
GENERAL	
STRENGTHS	WEAKNESSES
• Great diversity of interesting places to visit, closer together • Good general level of comfort and personal safety • Easy to reach (from the US, Russia) and travel around	• Concern about terrorism and security situation • Personal safety, violence, pickpocketing • Language barrier • Rudeness / lack of cultural understanding among service staff • Expensive, complicated to reach (from Latin America, Asia) • Feeling of "been there, done that" (US travellers) • Lacks feeling of active/adventure (US travellers)

Key conclusions on Europe's competitiveness for the LGBTQ segment

In light of the findings set out in Table 3 above, the following conclusions can be drawn on Europe's competitive position for the LGBTQ segment:

- Europe's competitive position in this segment is generally strong, with European countries that have a strong record in advancing equal rights for their LGBTQ citizens helping to create a positive perception about the region as a whole.

- Iconic events such as the Amsterdam Canal Parade and Madrid World Pride (2017) have gathered a lot of coverage in mainstream and social media far beyond Europe, helping to support the perception that LGBTQ diversity is celebrated widely.

- Perceptions about Europe's openness to receive LGBTQ visitors is infused with the understanding of what the region has to offer in terms of culture and heritage, a strong attraction in its own right. The juxtaposition of history (historic buildings, fine arts, museums) with modern values (acceptance of same-sex marriage, celebration of Pride) creates a powerful attraction in the minds of potential visitors.

- On a very general level, and compared to competitor regions, Europe is seen as a safe place to travel for women, strengthening its appeal for the lesbian market. Larger cities in Western Europe are also positively viewed by transgender travellers, who seek a destination where there is known to be a general level of acceptance of transgender people in society. However those who know the region well raise doubts or uncertainties about parts of Central/Eastern/Southeast Europe, which are less well-known in this regard.

- With regard to the 'gay holiday experience' (particularly for travellers who seek nightlife, events and festivals), clubs, bars and festivals are often designed to appeal to gay men only, with little to offer the lesbian segment.

- The consumer research and competitor analysis indicates that large parts of Europe are at best, unknown, or even perceived negatively in terms of the attraction for LGBTQ travellers. There is a significant opportunity to address this gap in understanding through marketing actions, and encourage less well-known destinations to 'catch up' in terms of what is offered to the LGBTQ segment.

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4.6 CASE STUDIES IN LGBTQ DESTINATION MARKETING

The following section presents two case studies on marketing destinations to the LGBTQ segment; one covering a national tourism organisation, and one covering a city destination marketing organisation. A more extensive collection of case studies can be found in Supplement A, available separately to this Handbook.

4.6.1 THAILAND

Thailand has long been a popular destination for LGBTQ travellers from its major inbound markets. As the volume of arrivals from Asian outbound markets has increased to Thailand, anecdotal evidence suggests that visits by LGBTQ travellers have also risen, as they are attracted by the country's relatively high level of social acceptance of homosexuality and gender fluidity, compared to countries elsewhere in the region.

The Tourism Authority of Thailand (TAT)'s overseas offices have however carried out campaigns locally in previous years. For example, the New York office has been promoting Thailand with the LGBTQ segment since 2011 with a dedicated website www.Gothaibefree.com to communicate to the US audience about Thailand's products and services, especially big events in Thailand that could draw LGBTQ travellers. However 2018 is the first year that TAT has officially promoted to the LGBTQ segment on a cross-market basis, with the launch of the 'Go Thai Be Free' campaign. The launch was marked by being the presenting partner of the LGBT Pavilion at ITB Berlin, giving the campaign visibility in Germany (a major source market), and towards the global travel trade gathered at the exhibition.

Image 1 (above): Consumer brochure and web banner from 'Go Thai Be Free' campaign. Courtesy of the Tourism Authority of Thailand

The main message that will feature in the promotional material for the LGBTQ segment is 'Go Thai Be Free'. Its meaning is clear: go to Thailand, be free, and be yourself.

In line with the teachings of Buddhism, TAT believes in equality so this segment is regarded as any other segment, in that LGBTQ travellers wish to visit and travel freely, and not be confined to any specific destination in the country. However the 'Go Thai Be Free' campaign does highlight some specific experiences, such as rooftop bars, fine dining restaurants, LGBTQ-friendly hotels and popular gay events, etc. It is also supported by a campaign brochure produced in collaboration between TAT and Attitude Thailand, a well-known gay publication.

With the new campaign, TAT aims to focus on as many outbound markets as possible, especially in the Americas (which now includes Canada, covered by a new TAT office in Toronto) and Europe. Australia is also of interest, and efforts in this market will build on the TAT's support for 'Trop out Thailand', an annual gay vacation festival in Phuket. Asian outbound markets are also important for the LGBTQ segment, and TAT will continue to look at ways to attract LGBTQ visitors from there too.

Aside from the campaign, other marketing actions carried out by TAT include participating in LGBTQ events such as Toronto Pride 2018, as well as B2B events.

During 2018, for the first time TAT has organised a B2B LGBTQ Travel Symposium in Bangkok in cooperation with OutThere magazine, which aims to educate Thai suppliers in being ready to welcome LGBTQ travellers. TAT's overseas offices have coordinated to bring almost 80 LGBTQ specialist travel agents, media and influencers to participate in the event, which has been combined with a media fam trip.

- Information supplied by the Tourism Authority of Thailand

THE LGBT* TRAVEL SYMPOSIUM THAILAND

Image 2: Pages from 'Go Thai Be Free' consumer brochure, and: LGBT Travel Symposium Thailand logo

4.6.2 TORONTO, CANADA

Image 3: Canadian Prime Minister Justin Trudeau greets participants at Toronto Pride (Image courtesy of Tourism Toronto)

Toronto is widely known as a welcoming, inclusive and progressive city. Lonely Planet has named the destination one of the most gay-friendly places on the planet. Over the past decade, Toronto as a destination has undergone a brand evolution, and this has included its approach to LGBTQ visitors.

According to Tourism Toronto, inclusivity is part of Toronto's new branding because it is a major aspect of the city's character. Therefore, marketing the destination as an inclusive place is more than a diversity initiative for one specific segment. The message of inclusion is integrated across all key markets– making the Toronto brand truly authentic in its approach.

Toronto brands itself as 'Canada's Downtown' – where the excitement is; the best of modern Canada; and where the Canadian experience begins – in a voice that's confident, worldly, empathetic and inclusive. Canada's Downtown is where all of Toronto's stories live and applies to each and every business line and market, including LGBTQ travellers. Tourism Toronto ensures that its mainstream content across all channels and markets speak to the LGBTQ traveller. This was highlighted during the destination's Views Are Different Here campaign that included a video showcasing the progressive people and experiences that differentiate Canada's Downtown.

The organisation recognises that it is still important to speak directly and uniquely to LGBTQ travellers, and it does this through Tourism Toronto's website and through social media, including working with influencers and ambassadors. However, the brand journey means no longer speaking to the LGBTQ segment in isolation. In this way, it truly encapsulates Toronto's message that it is not just about the city being diverse, it is about the city thriving because of that diversity.

- Information supplied by Tourism Toronto

4.6.3 BARCELONA

In light of its strategic position on the Mediterranean and its diverse cultural attractions, Barcelona has always been a crossing point for cultures and peoples, many of whom settle and contribute to enriching the city's diversity.

In terms of LGBTQ tourism promotion and development, the city's tourism board Turisme de Barcelona has historically carried out some sporadic promotion of the city to the LGBTQ audience, however a greater commitment to the segment came in 2002 when the organisation joined IGLTA. Since that time, the city has focussed variously on the following outbound markets: UK, France, Germany, Italy, the USA, and at a later stage, Brazil and Argentina.

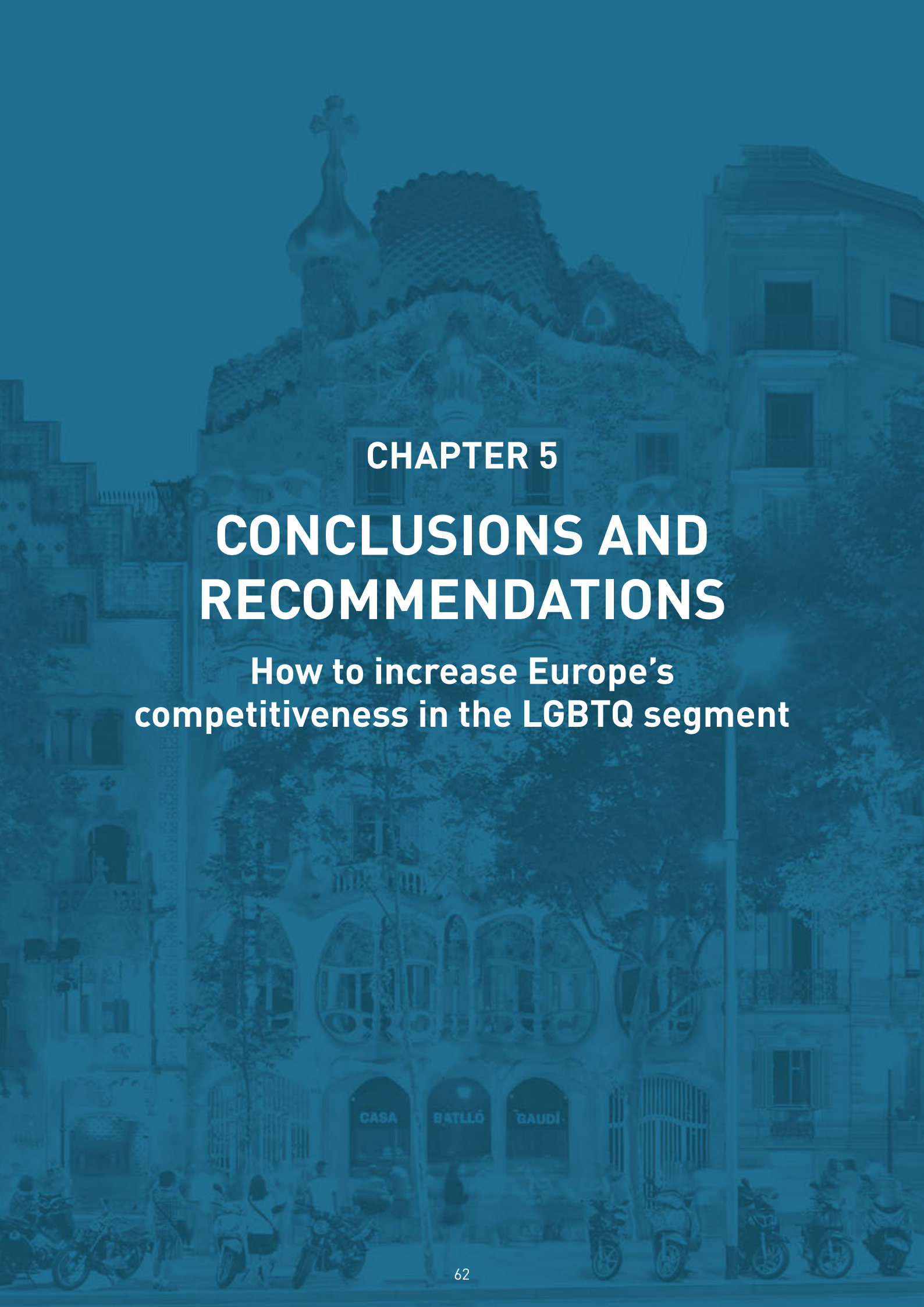
However, in 2018 Turisme de Barcelona decided to shift its focus towards non-traditional markets (in particular Asia), coinciding with the 2018 edition of Barcelona Pride. This decision was taken on the basis that the city has a positive perception in markets such as Japan, Taiwan, South Korea and others, and there is room for market development in attracting LGBTQ visitors from those countries.

In developing the LGBTQ segment, Turisme de Barcelona focuses strongly on B2B marketing. As such, attendance at the main LGBTQ travel events is important, as well as carrying out numerous fam and press trips for the travel industry, because the experience is important in encouraging trade visitors to discuss it afterwards. Turisme de Barcelona is also working with LGBTQ travel influencers from the target markets and has also collaborated with ACEGAL (the local gay business association) to launch the new website and social platform www.visitgaybarcelona.com, as well as to coordinate its international promotion plan in general.

Image 4: Consumer-facing banner to promote Barcelona city LGBTQ programme for visitors

At ground level, Turisme de Barcelona makes a point of assisting various key players to get to know each other and understand their business; in particular connecting the city's mainstream tourism suppliers with LGBTQ suppliers (shops, hotels, nightlife) as well as visiting fam and media trip participants.

- Information supplied by Turisme de Barcelona



CHAPTER 5

CONCLUSIONS AND RECOMMENDATIONS

How to increase Europe's competitiveness in the LGBTQ segment

5.1 GENERAL CONCLUSIONS

This report has found that the LGBTQ market segment is highly dynamic and is currently in a state of rapid evolution, driven by the increasing visibility and acceptance of LGBTQ people in many countries around the world. This process has helped LGBTQ people to gain legal recognition and equal rights, and has also helped destinations and travel suppliers to become more confident in targeting LGBTQ people as a consumer segment. For LGBTQ people who are fortunate enough to be able to afford it, travelling frequently represents a valuable opportunity for personal enrichment and socialisation. Often, travelling overseas may also offer the opportunity for LGBTQ people to live more freely than may be the case when at home.

Research for this report indicates that LGBTQ travellers in Europe's five major outbound markets have a generally positive image of the region due to a range of factors. These include:

- The leading role which some European countries have played in advancing equality for their own LGBTQ citizens and those of other countries.
- The visibility of LGBTQ culture in the media.
- Engagement with LGBTQ issues by government and business.
- The hosting of major LGBTQ-relevant events, and.

The presence of gay 'infrastructure' such as bars, nightclubs and specialist stores in many European destinations. Furthermore, when comparing Europe to competitor destinations such as the Americas or Asia and the Pacific, experts interviewed for this study consistently rated Europe as 'extremely LGBTQ friendly' or 'the most friendly' destination.

However, this broad assertion must be qualified with two important notes. Firstly, it is important to recognise the considerable disparity in the local acceptance of LGBTQ people and their visibility in society among the 35 states considered for this study. The factors shaping positive perceptions of Europe among LGBTQ consumers stem from some European countries covered by this study, but certainly not all. A significant proportion ETC Member Countries lag behind on key areas of law such as gender recognition, protecting their LGBTQ citizens from discrimination and allowing same-sex couples to form legally recognised partnerships.

Secondly, closer examination of the consumer survey conducted for this study indicates a much stronger perception of Western Europe offering a 'good quality of life', 'best vacation experience' and 'best events and festivals' for LGBTQ people than in any other part of the region. Approximately half of the 35 countries offered to respondents were only viewed positively by a handful of respondents.

Overcoming obstacles and improving Europe's competitiveness

While all visitors deserve to travel safely and have their basic human rights protected, globally LGBTQ people continue to face discrimination in society, including in some parts of Europe. Apart from this situation being regrettable and unacceptable, it also weakens Europe's competitive position as a whole for this segment. By taking steps to address these issues, improving the lives of local LGBTQ residents and ensuring a warm welcome for LGBTQ visitors, European destinations can play their part in advancing Europe's competitive position in this market segment as a whole.

The case studies presented in this report demonstrate that creating a high-quality experience for LGBTQ visitors and marketing it effectively requires sincerity and a long-term commitment from tourism stakeholders. To date, destination development and promotion has mostly been carried out at regional or municipal level, by local DMOs. Only a very small number of NTOs in Europe have made a concerted effort to promote all of their country to the LGBTQ segment. However, outside of Europe there are diverse examples of NTOs that have engaged with the LGBTQ market at national level. These include Argentina, Brazil, Colombia, Costa Rica, Mexico, Canada, Thailand, Guam, Japan and Israel.

Furthermore, examples such as Colombia and Costa Rica demonstrate that there are newcomers to the LGBTQ market segment that are making a serious commitment to investing in both the visitor experience and to approaching the LGBTQ segment across a range of channels. The emergence of tour operators catering to the LGBTQ segment in new destinations such as Asia and Latin America also demonstrates that LGBTQ travellers are now exploring way beyond the destinations that are traditionally associated with this segment. The trends analysis conducted for this study suggests that this trend is likely to continue, creating opportunities for European NTOs to attract a greater share of the LGBTQ travel segment.

5.2 CONCLUSIONS: CONSUMER INSIGHTS

Primary research on the characteristics, motivations and concerns of LGBTQ consumers in five key long-haul markets for Europe has found that:

The LGBTQ 'segment' is not one homogenous segment but extremely diverse. A traveller's sexual orientation and gender identity may shape own their travel motivations and interests, or not at all. However, when travellers fear for their personal safety (for example, when travelling as a same-sex couple, or having a different persona appearance to that in their identity document), it does have the capacity to shape the traveller's *experience*.

LGBTQ travellers of all budgets wish to travel. The LGBTQ segment (particularly the gay male segment) is frequently associated with high disposable income and luxury travel. While some luxury travel brands have found some truth in this, LGBTQ travellers come from a wide range of income backgrounds, and seek experiences at a range of price-points.

LGBTQ travellers in Europe's long-haul markets have a high affinity with Europe and a strong desire to visit in the near future. 80% of survey respondents expected to visit Europe in the next three years, with 92% of those who had visited before expecting to make a repeat visit.

Europe is a popular destination for same-sex couples from Europe's key long-haul markets, as it is viewed as ideal for romantic vacations, quality time together and cultural exploration.

LGBTQ events and festivals are high on traveller's wish-lists when visiting Europe, as well as the opportunity to sample the nightlife. However, many travellers are also looking for a cultural experience, including visits to specific sites and monuments, as well as opportunities to socialise with local people and enjoy high-quality experiences.

When selecting a destination, LGBTQ travellers to Europe value an open-minded and forward-thinking culture, as well as a history of acceptance, and equal rights for LGBTQ people in the destination. LGBTQ events and nightlife are also highly appreciated, however above all, safety and acceptance are most important.

Spain, Germany, the UK and the Netherlands are perceived by survey respondents as countries offering 'quality of life' to their citizens, as well as 'the best overall LGBTQ vacation experience' and the 'best LGBTQ events and festivals'.

When destinations seek to appeal to LGBTQ visitors through marketing campaigns and activities, LGBTQ consumers value: authenticity of the marketing message and images, and consistency between the marketing promise and in-destination experience.

Toronto Pride - Courtesy of Tourism Toronto

5.3 STRATEGIC RECOMMENDATIONS

Table 4: Overview of strategic recommendations

1. SPREAD EQUAL RIGHTS MORE EVENLY IN EUROPE

2. PROMOTE LGBTQ INCLUSION AND DIVERSITY IN DESTINATIONS

3. USE LGBTQ SEGMENT TO TACKLE STRUCTURAL CHALLENGES

4. COMMUNICATE RICH HISTORY & MODERN VALUES

5. REFLECT THE TRUE DIVERSITY OF LGBTQ PEOPLE

5.3.1 Improve Europe's competitive position by ensuring that equal rights for LGBTQ people are spread more evenly across Europe

In order to improve Europe's competitive position for attracting LGBTQ visitors, measures should be taken to ensure that LGBTQ visitors are able to travel safely, comfortably and openly across the whole region. Fundamentally, this means not only working with the quality of the visitor experience in mind, but the quality of life of local people too. Developing the LGBTQ market and advancing equal rights for LGBTQ people must go hand-in-hand. [55]

Yet, at the same time it is important to underline that LGBTQ people do not require a special set of rights; rather, they require *equal* rights, i.e., equal protection from discrimination and the same rights and opportunities as everyone else. LGBTQ rights are human rights, and human rights are LGBTQ rights, and this matters when LGBTQ people travel, just as much as when they are at home. Furthermore, while some countries are further ahead in achieving equality for their LGBTQ citizens, the journey towards equality is never finished; progress cannot be "won", but must be continually sustained over years, decades and generations.[56] Advances in achieving equal rights under the law should also be supported by widespread and systematic public education campaigns in order to help raise awareness and consolidate the acceptance of LGBTQ people in society.

5.3.2 Promote a culture of inclusion and diversity within destinations as the key to unlocking competitiveness

When LGBTQ people are able to live openly without fear of discrimination, they can communicate better, be more creative and ultimately contribute more fully to the workplace, helping their employer to become more innovative and competitive. Meanwhile, customers are more comfortable buying from businesses that understand them and respect their personal identity. These principles can all be applied to destinations and their visitors as much as to businesses and their customers.[57] In this way, NTOs in Europe should promote a culture of LGBTQ inclusion and diversity within their respective national tourism sectors as a means of encouraging greater innovation, creativity and competitiveness.

55 Ibid UNWTO (2017), p.86
56 Economist Intelligence Unit (2018), Pride and Prejudice: The Future of Advocacy, Economist Intelligence Unit Ltd, London, p.4
57 Ibid UNWTO (2017), p.36-p.38

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5.2.3 Prepare the ground to ensure consistency between the marketing promise and the in-destination experience

European NTOs should first work to 'prepare the ground', by assessing the current situation for local LGBTQ residents and working with public bodies and civil society to address major issues such as tackling discrimination and advancing equality for LGBTQ people. Within government, these policy issues are more typically associated with areas such as justice, policing, health care and education. However, tourism authorities can play a significant role in areas such as:

- Working within the tourism sector to raise awareness of issues to be addressed in tackling discrimination against LGBTQ people;
- Coordinating education and knowledge-building that promotes LGBTQ inclusion and diversity within the tourism sector, and ensures a high-quality of service for LGBTQ visitors;
- Building partnerships with the private sector to develop and package products, and carry out training prior to going to market

Adopting such an approach confirms the shifting role of NTOs from marketing towards management and facilitation within their respective destinations, an approach that is particularly important in the case of the LGBTQ segment, since it is essential to approach this market in a sincere, authentic and consistent way.

5.2.4 Develop the LGBTQ segment as a means to address structural challenges in destinations

It is more important than ever to ensure that tourism in Europe is a source of sustainable economic and social development in destinations rather than being a burden on the environment, local economy or social cohesion. Where European destinations seek to develop their competitive position in the LGBTQ market, this should be done with the aim of addressing structural challenges such as:

- Dispersal from crowded urban spaces towards rural areas;
- Encouraging visitation during low season;
- Preserving the built and natural environment of the destination;
- Creating jobs that are stable and offer fair conditions, and;
- Helping those who are vulnerable or disadvantaged (particularly those in the local LGBTQ population who may benefit from additional support)

5.2.5 Enhance the perceptions of Europe as a diverse destination, with a rich history and modern values

European destinations should work towards the common goal of promoting Europe as a diverse destination where all visitors will feel welcome and respected no matter what sexual orientation or gender identity. Research for this handbook indicates that the mix of 'rich history and modern values' is a powerful attraction for LGBTQ consumers in Europe's long-haul markets. This, and travellers' increasing desire to go 'off the beaten track' indicates that there is ample space for European destinations to establish their position in the LGBTQ market.

5.2.6 Understand and reflect the true diversity of the LGBTQ segment

In doing so, it is essential to reflect the true diversity of Europe's LGBTQ population, and its potential visitors. LGBTQ people are highly diverse, and are attracted by the diverse range of experiences that European destinations have to offer. Lesbian, bisexual, and transgender travellers are too frequently overlooked in marketing. It is important to address this by developing tourism products and marketing techniques that are more open-minded and inclusive.

5.4 KEY PRIORITIES FOR ACTION

Based on the conclusions and strategic recommendations set out above, the following section sets out the key priorities for action to be adopted by European NTOs, private sector suppliers and civil society in order to strengthen Europe's competitiveness in the LGBTQ travel segment. These Priorities are organised into three broad groups:

1. Advancing equality
2. Destination Management
3. Destination Marketing

5.4.1 PRIORITIES FOR ADVANCING EQUALITY

Tackling inequality and discrimination for local residents, and ensuring a safe, welcoming environment for LGBTQ visitors is not the task of any one organisation. Instead, concerted effort is required across a range of fronts and with broad range of partners.

i. **Build relationships with NGOs to understand key issues**

As a first step, NTOs can build relationships with non-governmental organisations (NGOs) dedicated to advancing LGBTQ equality within their destination. Together they can evaluate the key issues to be addressed within their respective destinations and identify areas in which the tourism sector as a whole can contribute to advancing LGBTQ inclusion and diversity.

i. **Raise awareness of, and implement best practice**

NTOs can also play a key role in raising awareness of the diverse approaches to advancing LGBTQ equality that they can take internally, and encourage their private sector partners to take. There are numerous indicators by which organisations can measure their performance with regard to advancing LGBTQ inclusion and diversity. One of the most widely recognised is the United Nations' Free & Equal *Standards of Conduct for Business*, presented in the box below.

FREE & EQUAL
UNITED NATIONS

UNFE Standards of Conduct for Business

The Standards of Conduct are intended to support the business community in tackling discrimination against LGBTQ people, thereby accelerating the pace of change at global level. They set out the steps companies can and should take to ensure equal treatment at work and tackle discrimination in the broader community, and ere summarised below:

1. **Respect human rights:** Businesses should develop policies, exercise due diligence, and remediate adverse impacts to ensure they respect human rights of LGBTI people.
2. **Eliminate discrimination:** Businesses should ensure that there is no discrimination in their recruitment, employment, working conditions, benefits, respect for privacy, or when dealing with cases of harassment.
3. **Provide support:** Businesses should provide a positive, affirmative environment so that LGBTI employees can work with dignity and without stigma.
4. **Prevent other human rights violations:** Businesses should not discriminate against LGBTI suppliers, distributors or customers, and should use their leverage to prevent discrimination and related abuses by their business partners.
5. **Act in the public sphere:** Businesses are encouraged to contribute to stopping human rights abuses in the countries in which they operate. This might include public advocacy, collective action, social dialogue, support for LGBTI organizations, and challenging abusive government actions.

For more information please visit: www.unfe.org/standards

5.4.2 PRIORITIES IN DESTINATION MANAGEMENT

i. **BUILD A COALITION:**

Bring together private sector partners with an interest in engaging with the LGBTQ segment to form a national strategy on LGBTQ tourism (NB: such a coalition may already exist in the form of an LGBTQ Business Network or Chamber of Commerce). Support these groups by providing strategic direction, facilitating overseas trade missions, building knowledge through data and insights, assisting with contacts and other support mechanisms.

ii. **CARRY OUT RESEARCH:**

Conduct research on the social and economic impact of the LGBTQ segment in the destination, perception analysis of LGBTQ consumers from major inbound markets, and destination audits on the preparedness of the destination to welcome greater numbers of LGBTQ visitors.

iii. **EDUCATION AND KNOWLEDGE-BUILDING:**

Help to build awareness of the dynamics of the LGBTQ segment, latest trends, marketing approaches and staff training needs (e.g. sensitivity training and updated terminology). Disseminate this report and other relevant resources.

iv. **PRODUCT DEVELOPENT:**

Support tourism suppliers and other public authorities in developing tourism products and experiences that have a strong appeal to the LGBTQ segment. This includes hosting or supporting LGBTQ-relevant events that have international appeal and can provide a sustainable basis for further market development in the future.

v. **PROMOTE DISPERSAL:**

To date, LGBTQ tourism has been most strongly associated with large cities, however this overlooks a significant proportion of the LGBTQ segment that may seek to explore less-visited towns, villages and rural areas. Hence NTOs should proactively engage with tourism suppliers in those areas to build awareness of the market and spread LGBTQ visitors more widely.

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5.4.3 PRIORITIES IN DESTINATION MARKETING

i. COMMUNICATING A DESTINATION'S CULTURE:

Research for this Handbook has demonstrated that potential LGBTQ visitors are attracted by a range of attributes beyond the main visitor attractions and nightlife.

Content could include:

- Features on prominent-LGBTQ public figures;
- Guides featuring 'gay neighbourhoods' (where relevant);
- Features on LGBTQ life beyond the major cities;
- Discussion of LGBTQ issues in public life (e.g. same-sex marriage legislation)
- LGBTQ-relevant events and festivals.

When creating content, it is essential to work with the local LGBTQ community, as well as local and overseas media to ensure that content is accurate, relevant and authentic, regularly updated and available in the language of key inbound markets.

ii. AVOID STEREOTYPES:

Reinforcing stereotypes through advertising campaigns can intensify social stigma of the LGBTQ population, and is unhelpful. In order to stand out, it is wise to take an original approach by working with local people, realistic models and present new themes that give an authentic, sincere and attractive message to potential LGBTQ visitors. Efforts should be made to give visibility to LGBTQ people of all identities, ages and ethnic backgrounds.

iii. INTEGRATE LGBTQ CONTENT WITHIN MAINSTREAM MARKETING CHANNELS:

One of the greatest signals of acceptance and openness to LGBTQ consumers and their allies is to include relevant images (such as same-sex couples) within mainstream marketing campaigns and channels. Research shows that LGBTQ consumers value this highly, and notice it too.

iv. JOIN BUSINESS LGBTQ TRAVEL EVENTS AND ASSOCIATIONS:

Joining networks such as IGLTA and attending events such as the IGLTA Annual Global Convention, ITB LGBT Pavilion or FITUR LGBT can be an effective way to meet contacts in the segment, build relations with key business and media contacts and establish a presence in the market.

v. BUILD RELATIONS WITH THE LGBTQ TRAVEL TRADE:

Build relations with specialists in the LGBTQ travel trade; both inbound and outbound tour operators, research organisations, and the LGBTQ media (see blue bubble in Figure 1 in Chapter 2) in order to improve understanding of the market and facilitate relations between overseas and domestic travel trade in the LGBTQ segment.

vi. BUILD RELATIONS WITH NON-TRADITIONAL PROMOTIONAL PARTNERS:

Communicating openly with potential LGBTQ visitors is easier in some of Europe's major source markets than in others. For this reason, working through the country's embassy network and with multinational businesses with a presence in the market can be effective ways to communicate the destination's openness to LGBTQ visitors (e.g. through hosting LGBTQ-relevant cultural events), without having to rely on mainstream media channels.

vii. DEDICATE A MARKET SPECIALIST:

By assigning an individual or small team to developing the LGBTQ market segment. NTOs can provided a dedicated year-round resource to understanding the market, coordinating dialogue with the business sector and implementing marketing campaigns related to the segment.

ANNEX 1 - METHODOLOGY

PRIMARY RESEARCH METHODOLOGY

Primary research for the Handbook consisted of a balance of quantitative and qualitative methods:

Quantitative methods:

Quantitative data on the characteristics of five long-haul outbound markets (Brazil, China, Japan, Russia and the United States) was sought through an online survey. The survey was available online for a period of 44 days, from 26th April to 9th June 2018, and was distributed through Hornet Networks, a social network for the LGBT community. Users received notifications through the Hornet app or when logging into the desktop site. The link to the online survey was also available through the Hornet blog, and was also shared by industry partners including IGLTA. In addition to the languages of the five target markets, users could select to take the survey in Spanish, Thai or Turkish.

The online survey asked 17 multiple choice questions covering personal background, self-definition of sexual orientation and gender identity, past and future travel plans in Europe, as well as motivations and concerns surrounding European travel, and perceptions of European countries.

Due to the limitations to obtaining a representative sample explained at the start of Chapter 2, insights collected through the online survey were intended as exploratory. While responses were not weighted, responses from countries with large sample sizes (e.g. Russia) were compared for any influence over the results as a whole.

Qualitative methods:

During the period 3rd April – 21st June 2018, a total of 18 in-depth interviews were conducted in-person or via phone with tourism professionals, travel media and experienced travellers in the four of the five target markets (an interviewee was sought for Russia, but none was forthcoming). During the interviews, seven open-ended questions were used, covering:

- Destination perception
- Country combinations
- Favoured countries/combinations
- Travel motivations and concerns
- Recommendations on marketing to the interviewee's market

Finally, for the compilation of case studies, five national and four local destination marketing organisations were invited to submit data and promotional materials.

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SECONDARY RESEARCH METHODOLOGY

The secondary (desk) research for this report has drawn on a wide range of journals, reports and media articles from respected international organisations and media. References to all materials are included in the footnotes of this Handbook.

In the context of this report, 'Europe' relates to the 32 members of the European Travel Commission, plus France, Sweden and the United Kingdom. The following list of 35 countries was offered to respondents in relevant online survey questions:

1. Austria
2. Belgium
3. Bulgaria
4. Croatia
5. Cyprus
6. Czech Republic
7. Denmark
8. Estonia
9. Finland
10. France
11. Germany
12. Greece
13. Hungary
14. Iceland
15. Ireland
16. Italy
17. Latvia
18. Lithuania
19. Luxemburg
20. Malta
21. Montenegro
22. Netherlands
23. Norway
24. Poland
25. Portugal
26. Romania
27. San Marino
28. Serbia
29. Slovak Republic
30. Slovenia
31. Spain
32. Sweden
33. Switzerland
34. Turkey
35. United Kingdom

ANNEX 2 - USEFUL RESOURCES AND FURTHER READING

LGBTQ TOURISM; POLICY, TRENDS, RECOMMENDATIONS

UNWTO Global Report on LGBT Tourism (1st edition 2012, 2nd edition 2017), available at: www.iglta.org/research

PATA Issues & Trends, Vol 17, 3rd edition - The LGBT Travel Market in Asia: https://pata.org/store/publications/volume-17-3rd-edition-the-lgbt-lesbian-gay-bisexual-and-transgender-travel-market-in-asia/

CALENDARS OF EVENTS:

ILGA-Europe list of Pride events: www.ilga-europe.org/resources/pride-event-calendar

IGLTA Global Pride Calendar: www.iglta.org/gay-pride-event-calendar/

DESTINATION EVALUATION:

Rainbow Europe ranking of 49 European countries: www.rainbow-europe.org/country-ranking

Destination Pride tool: www.destinationpride.org

Handbook Supplements A and B (Case Studies and Expert Interviews) are available upon request from the European Travel Commission and the International Gay & Lesbian Travel Association.

ABOUT THE AUTHOR

Peter Jordan is a consultant and researcher specialised in the curation and interpretation of consumer trends for diverse clients from inside and outside the tourism industry. Since 2008 he has worked on research and industry education projects for the United Nations World Tourism Organization (UNWTO), Pacific Asia Travel Association (PATA) and the International Gay & Lesbian Travel Association (IGLTA).

In recent years, Peter has become widely respected for his work in the LGBTQ segment, having authored both editions of the groundbreaking UNWTO Global Report on LGBT Tourism. He works on a range of LGBTQ destination development projects has presented on the future of LGBTQ travel at numerous industry events.

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For more information about the IGLTA Foundation, please visit iglta.org/foundation.

IGLTA Platinum Global Partners:

DELTA · Disney Destinations · Hilton · Marriott International

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HORNET

25 MILLION users

250 MILLION messages sent weekly

1.6 MILLION places visited per day

2 BILLION monthly ad impressions

2.6 MILLION monthly actives

7 number of daily logins per user

42 MILLION daily messages sent

"Hornet built the largest and one-of-its-kind global gay news room"
- Forbes

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