

The world's LGBT marketing agency.

### The LGBT Future

Revealed by Out Now. World Travel Market.

Paul Clark

Lotte Jeffs

lan Johnson

Ralf Ostendorf



London, UK. 10 Nov 2010.

## The LGBT Future

Paul Clark

Lotte Jeffs

lan Johnson

Ralf Ostendorf

Out Now's global team









# Consumer trends shaping the world.

The LGBT demographic is gaining significant traction in its quest for equality (and is) building momentum towards an inflection point – a moment of dramatic change in expectations, responsibilities and market opportunities..."

- Research Live, MRS, September 29, 2010



# Consumer trends shaping the world.

"

...a pattern emerges of pumped-up volume on diversity, gay and gender rights and the outing of individuals, companies and countries. Companies need to tune in to these converging forces to plan for the future."

- Research Live, MRS, September 29, 2010



## Our LGBT Future

2010 Out Now Global LGBT Study

- Stay future-focused
- TUI Freedom Collection by Thomson start where?
- Lesbians an untapped opportunity?
- Berlin how can a gay capital stay in front?

2011 LGBT Tourism Market Potential revealed



# NextLevelThinking.

# Ignorance Respect



# Go Global.

Political Map of the World, April 2006



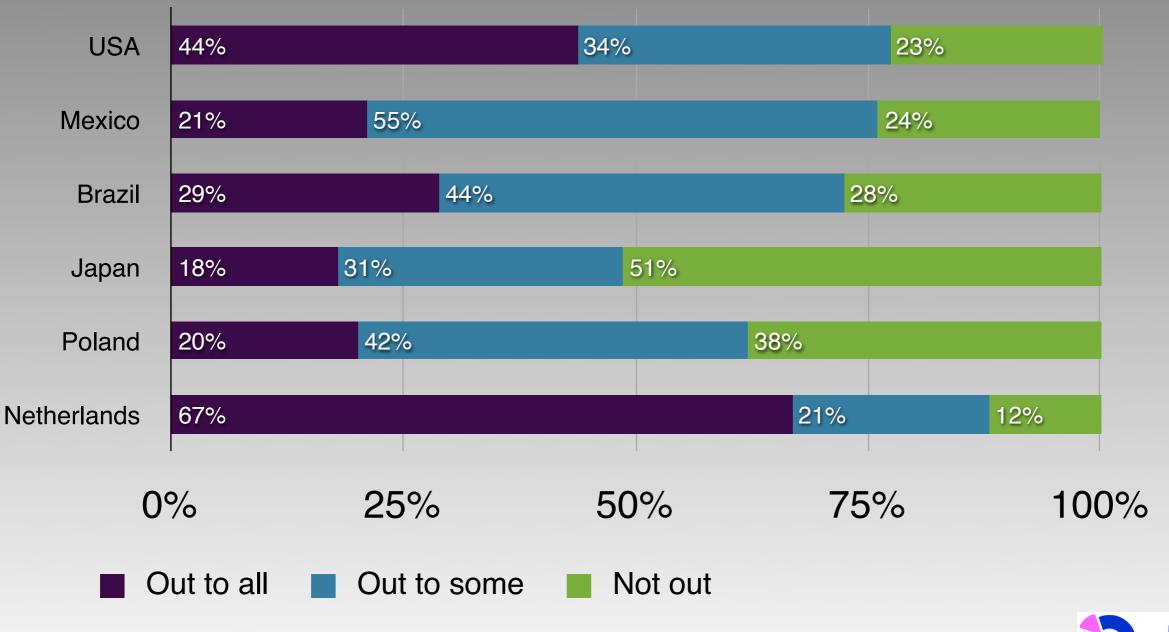
#### 2010 Out Now Global LGBT Market Study

- Multi-country
- Comparative data set
- Lifestyle
- Consumer
- Travel
- D & I factors
- Consumers' voices



## How out are you?

At work...

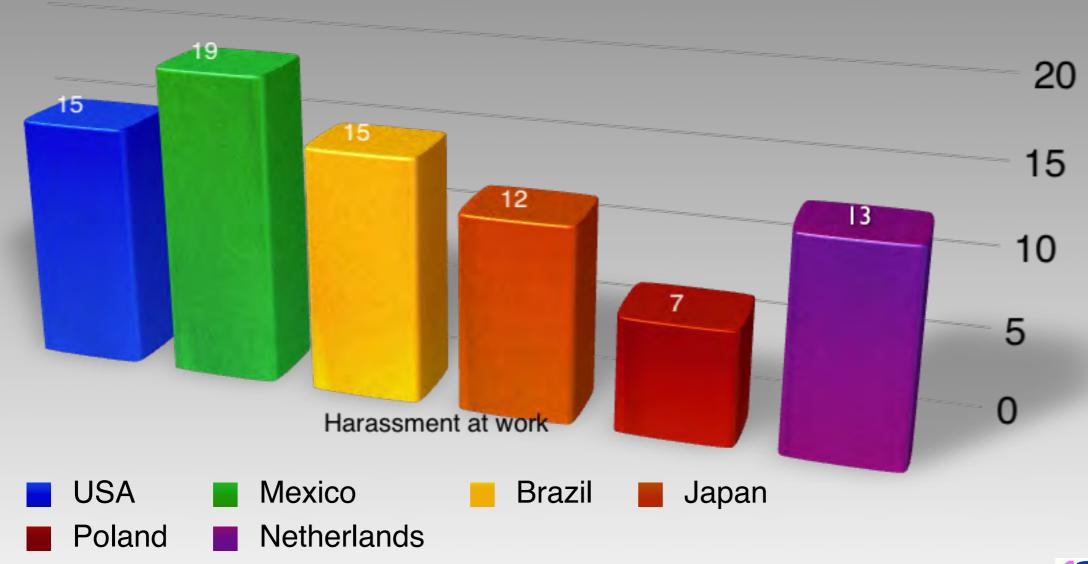




Source: 2010 Out Now Global LGBT Study

#### Harassment at work

Suffered from following in past twelve months (%)





- It is not made public, such as bullying kick hit,
- From behind, "gross" or the like murmurings,
- "I like any man," or because they are mistaken, just spoke, "I like (laughs)" or misunderstood, to be a joke or a laugh. Honest, hard.

• sometimes they just keep asking if i have a girl friend or if i were gay in front of everyone, but they don't realize that they makes me uncomfortable.

 Since permanent harassment from supervisors concerning the disclosure of their sexuality, even from board.

 Questions about my personal life / sexuality lovemaking from a stranger

• In a situation where I did not have in place Sekushuarumainoriti (policies), disgust about homosexuality and gender transition, or demonstrate an attitude of ridicule to the rumor. From such treatment in the workplace, the problem of consciousness of each individual employee, often have an awful time.

- After coming out to senior workers had faith in me before, but not after
- The quarrel became things work
- Everyone has threatened to bump off my sexuality at work.

 my partner works and talks about many situations in the company. People have little or no knowledge of the LGBT community and not the end of deliberately duplicate the homophobic stereotypes

• If you do not change the attitudes of "rulers" to those with different orientations will not change the attitude of the employee. In my work, a gay person is treated as an insult to the dignity of the office worker

 low level of education and social confusion of concepts such as homophobia, homosexual and pedophile

 I work for IBM - which is the most friendly company for LGBTQ

#### USA

• I work in a corporate office. I am not invited to participate in social activities after work very often, or when humorous personal e-mails are sent around to the other young people in the office, I am generally not included, unless I ask what everyone is laughing at, in which case someone will send it to me.

#### USA

• There have been those who have had zero tolerance and outright fear in the workplace for me. It has been difficult in the past. A large number of people have made degrading comments and I have been passed over for promotions.

#### USA

 Had lunch with an attorney who did not realize I am a lesbian. When I asked her what types of packages she had in regard to estate planning for my gay and lesbian clients, she told me that she had made a conscious choice not to work with "those people". Her referrals just went out the door...

"

Even when we were walking right in the front door we were saying - 'do you think they're going to give us two separate beds? All we wanted to do was crash on the bed, but we were thinking - 'how are we going to address this?' How awkward might it be?"



"

I am getting so sick of hotels claiming they are 'gay friendly' or gay-welcoming - only to discover their management might be friendly to what's in my wallet but their staff have not got a clue how to make me feel welcome."



Often I just don't bother asking them to help me find a gay bar or club I might want to visit - it's just not worth the stress."



# Comfortable?





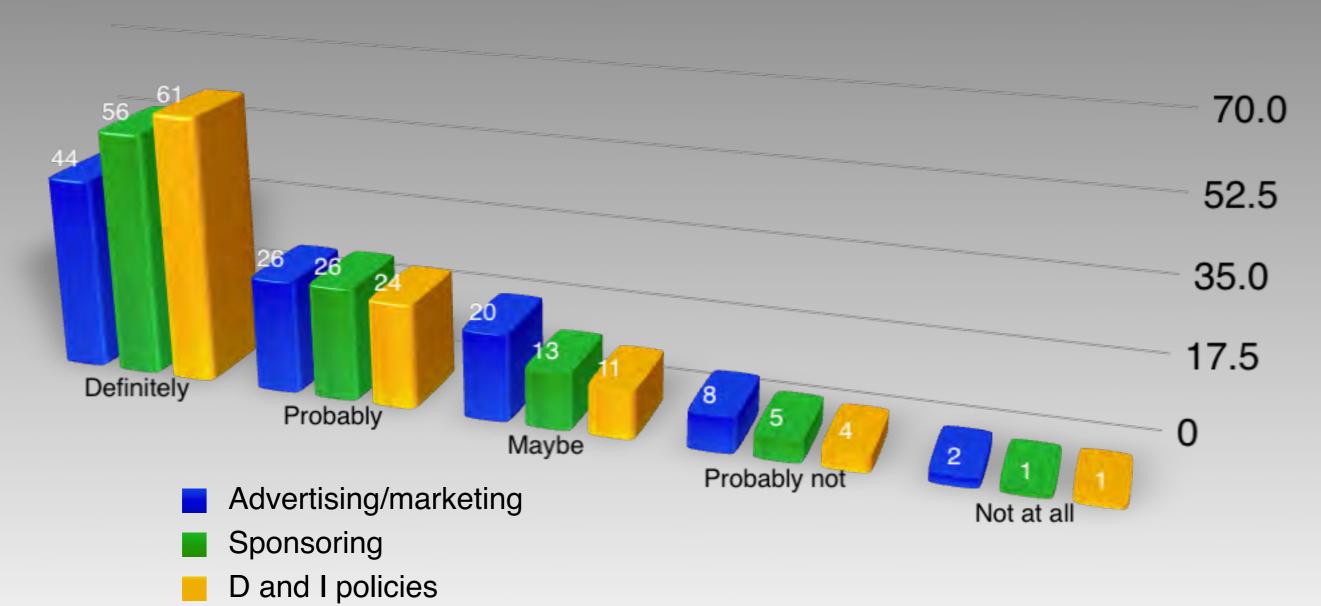
A rainbow flag wrapped into their ad or all over

their logo - it just reeks of insincerity to me."



# Diversity sells. Engage.

#### Influence brand selection decision? - USA

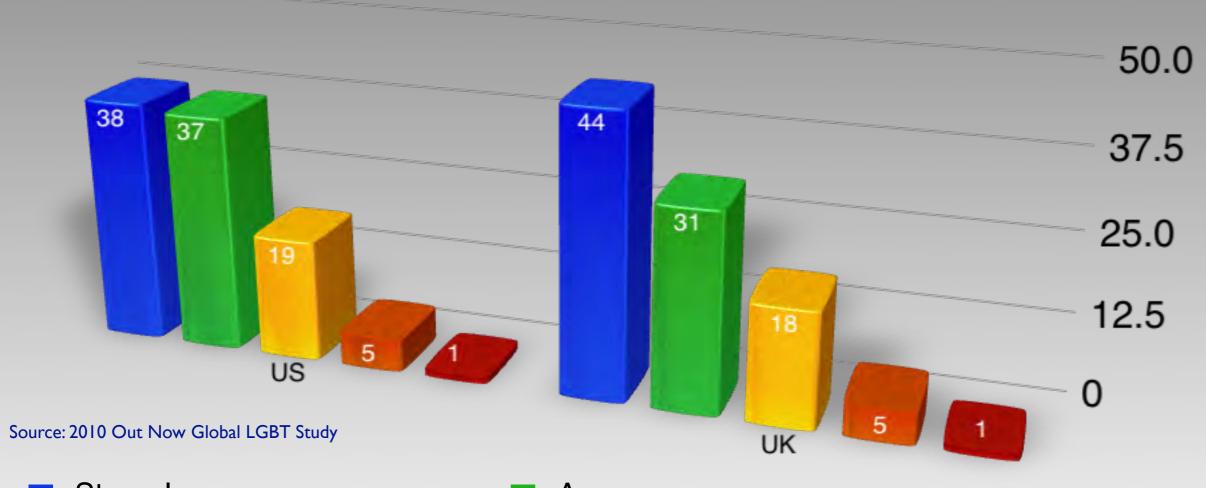




Copyright: 2010 Out Now Source: 2010 Out Now Global LGBT Study

#### 2010 latest data

US v UK - hotel preferences (Seek 'gay welcoming')



- Strongly agree
- Neutral/Slightly agree
- Strongly disagree

- Agree
- Disagree



# So what do you do? Help!



# World's best.

# GayComfort CERTIFIED2011

- Berlin, Stockholm, Gold Coast, Helsinki, Buenos Aires, Bariloche
- TUI, Air Canada Vacations, Fabugo, HotelREZ



# Welcome

Manchester.

**GayComfort** 

CERTIFIED2011

- Unlimited trainings
- Full certification
- 2010 + 2011



# Next Level

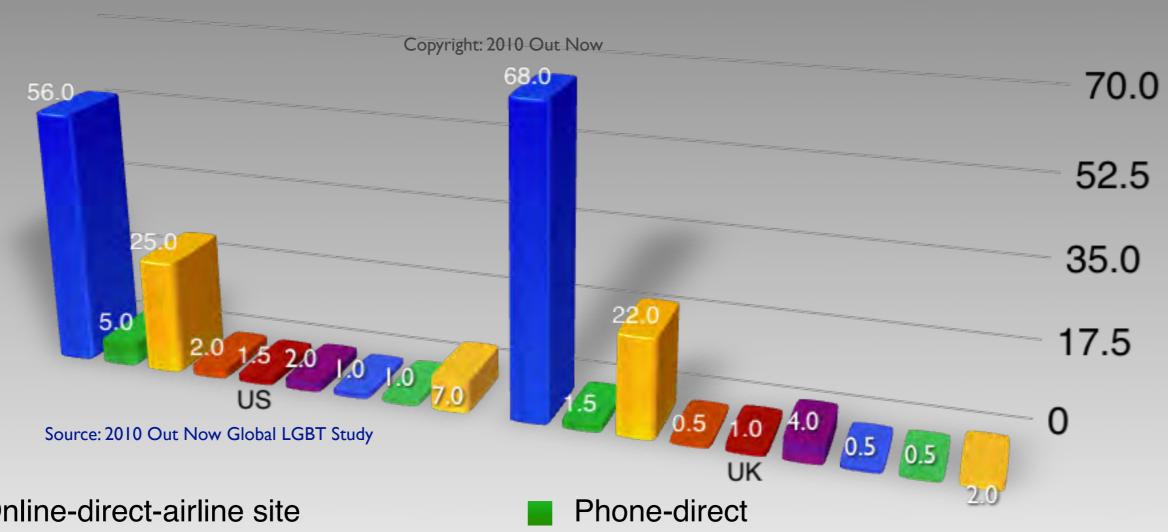
# GayComfort CERTIFIED2011

- New consumer site 'Know Before You Go'
- Module 2 Managers Edition



#### 2010 latest data

#### Airlines - Booking preferences - USA v UK



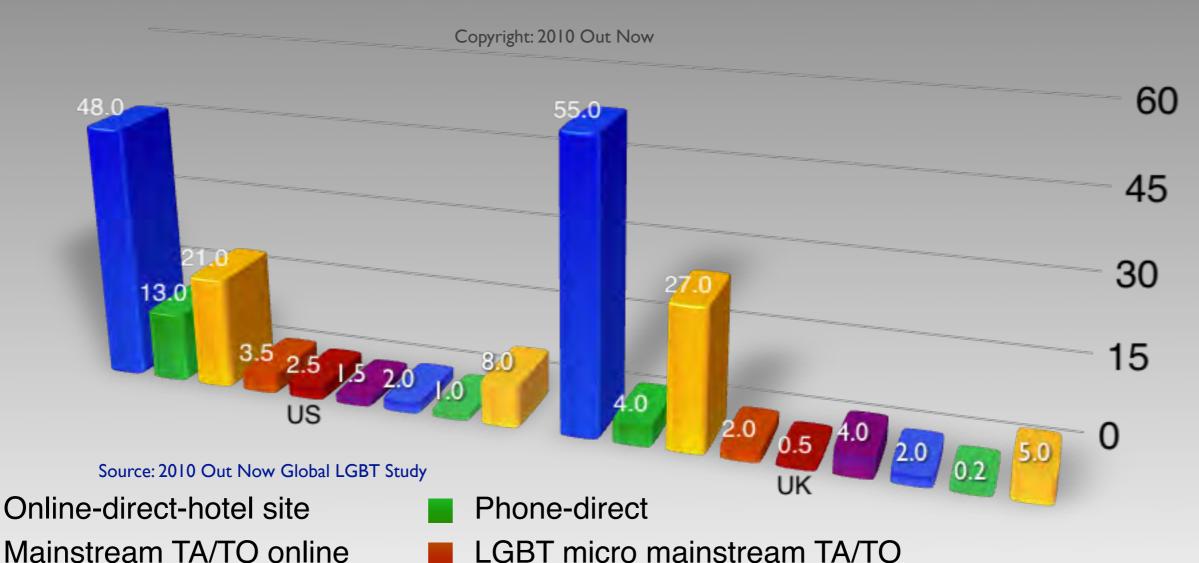
- Online-direct-airline site
- Mainstream TA/TO online
- LGBT micro mainstream TA/TO
- LGBT TA/TO online
- Other

- LGBT micro airline
- Mainstream store
- LGBT TA/TO store



### 2010 latest data

#### Hotels - Booking preferences - USA v UK



- LGBT micro hotel
- LGBT TA/TO online
- Other

- LGBT micro mainstream TA/TO
- Mainstream store
- LGBT TA/TO store



# LGBT goes mainstream.

### Paul Clark

Innovations manager / Regional manager Airlines TUI Thomson



# LGBT is mainstream.

- Most important person = customer
- TUI expanding diversity of product
- Niche market opportunity
- How to implement?
- Real world
- Meeting challenges



# Beginning.

- Research
- Seek match of product with customer
- Internal focus
- Customer focus
- Supplier focus



# Launch.

- \$10
- Start realistically and build
- Expect the unexpected it's natural
- Volcanic welcome
- Be nimble
- Adapt
- Stay future-focused

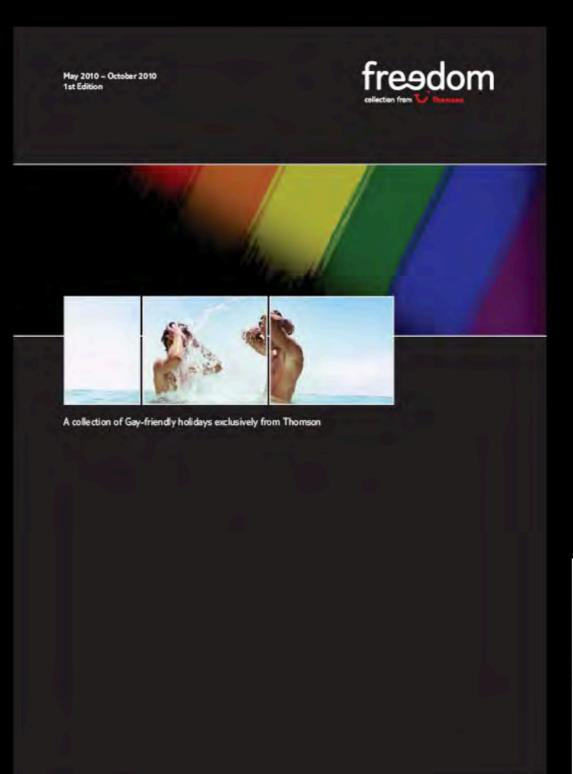


# Product.

- Evolution for staff
- Male bias
- Female sales strong on limited product
- Male-only product
- Female-only product
- Customer issues be ready
- Customer issues be open
- Market issues be adaptable

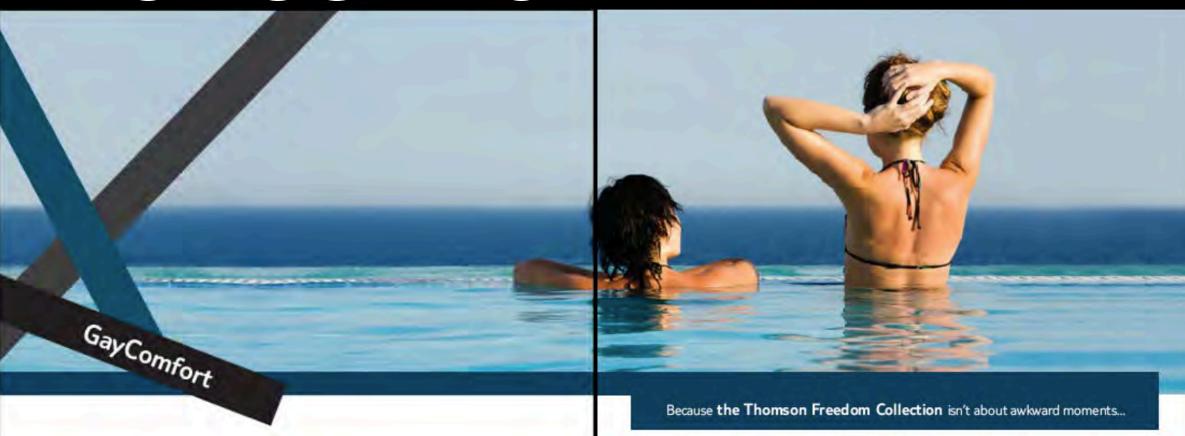


# Launch.





# Takes work.





Sometimes a holiday can offer up some toe-curing scenarios. You know what we mean – the customary 'can we swap our twin room for a double?' question or the surprised bolls when you walk through reception hand in hand. But GayComfort has been designed to do away with all that.

It's an education programme designed by Out Now, leaders in promoting gay and leablan travel. GayComfort is referred to as "the best gay training and accreditation programme in the world" by leaders in the travel industry. Staff at each and every Finedom property complete the course to make sure you feel at home the moment you step into the lobby. So in other words, these hotels haven't just ticked a box to say they're gay or lesblan-friendly.

The reason we've taken this approach is because three out of four gay or lesbian hold symalers actively seek hotels they believe are 'genuinely' welcoming. And research shows most are worried about the reception they'll receive from, well, reception - not to mention the bar staff, the housekeepers and the waiters. More and more, people are looking for confidence that their holiday will be a hassle-free experience.

When you stay at our GayComfort accredited properties, you can relax and feel comfortable being you said. Isn't that how travel should be?

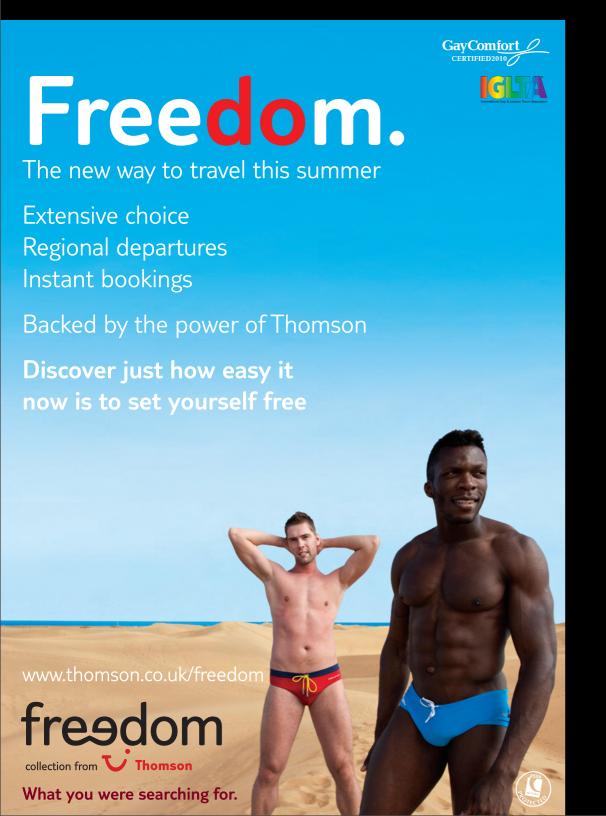




"GayComfort is a major step forward for lesbian and gay travellers."

International Gay and Lesbian Travel Association

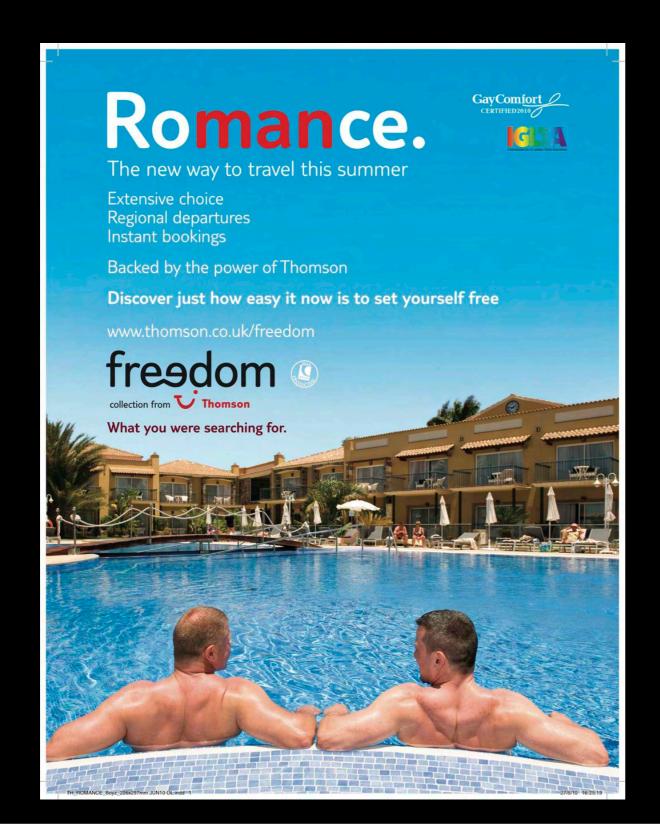
### What you were searching for.







## This is now.





# This is now.





# Think different.



### Think different.



# Get social.



facebook









What you were searching for.

# What's next? 2011

- Female focus needs more emphasis
- Extended product
- Strengthen training in new ways
- Never forget who the most important people are...
- Our customers drive Freedom



# 2011 - get ready.



### Lesbian Marketing and PR Strategies

- With thanks to Tanya Churchmuch
- www.girlports.com
- Why market to lesbians?

Because lesbians are an untapped market that can help you make money!



### Lesbians have money to spend?

Yes we do, so forget those boring old clichés that all lesbians are poor, skip restaurants for pot-luck dinners, and that the only travel we'll do is to attend women's music festivals.

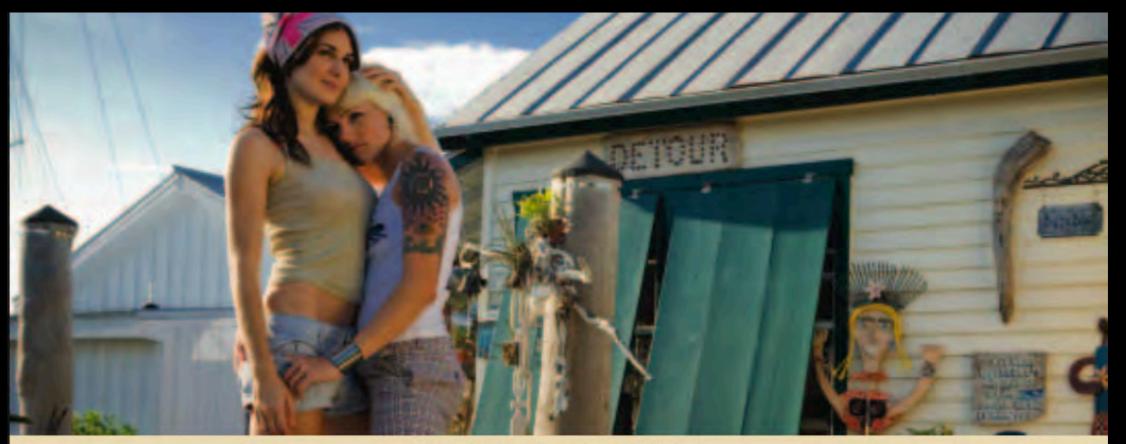


### Why limited lesbian marketing?

- Companies believe that if they advertise to gay men, it automatically means they're also advertising to lesbians.
- Putting an ad with two shirtless guys in the Advocate or Out Magazine does not reach lesbians. An ad with a gay male couple AND a lesbian couple does though. And it reaches gay men at the same time.
- You wouldn't put an ad with only an Asian couple in a publication aimed at African-Americans using the argument that they are both cultural niche markets.
- However, the same way straight men rarely read Vogue or straight women rarely read GQ, gay men and lesbians often read different publications as well.



### Some interesting examples.



#### NO BOYS ALLOWED.

In the fabulous gay & lesbian destination of Key West, girls can be with girls and boys get the message.

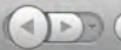
In fact, many of the boys in Key West have put up signs of their own.



fla-keys.com/gaykeywest ~ 1-866-405-4904

Key West rated "Favorite Gay Resort Town" - The Out Traveler, 2008 Reader's Choice Awards











http://www.kimptonhotels.com/programs/glbt-community.aspx





Getting Started Latest Headlines & NPR: Monitor Mix blog Girlports.com - web ... Girlports webmail Girlfriend is a Homo Girlports CMS Admi...

Kimpton Hotels: LGBT (GLBT) Fr...



**Promotions** 

Hotels

Restaurants

**Meetings & Events** 

Services

**Programs** 

Kimpton InTouch

Search



Global Business Program

Kimpton InTouch

**Programs Home** 

Kimpton Cares

Women InTouch

EarthCare

LGBT

Kimpton Style

Receive Newsletters & Offers

Gay and lesbian guests as well as our employees have always been very important to Kimpton Hotels & Restaurants. Starting in San Francisco in the 1980's, Kimpton has always recognized the important role the gay and lesbian community has played in the company. Right from the start, the hotels were known for their unique environments and the gay and lesbian community responded very favorably. In addition, we are very proud that Kimpton has always had a large number of gay and lesbian employees.

Employee sensitivity training plays a key role at Kimpton hotels. In working with every guest, each employee instinctively portrays the five elements that are the essence of Kimpton - "care, comfort, style, flavor and fun." We take the time to train our staff not to make assumptions but instead to offer choices, even in small personal ways. Just check out our Rave Reviews to better understand how Kimpton understands the needs of LGBT community and how our guests value our efforts.

Kimpton Supports its LGBT Employees

Kimpton's gay and lesbian employees are represented on every level of the company, including upper management. Kimpton's outreach to the community is coordinated through KGLEN, the Kimpton Gay and Lesbian Employee Network, This

Hotels Cities Choose a Kimpton Hotel Arrival Departure 1 2 0 : Rate Code Corporate ID Rate Types Best Available

### Some interesting examples.



ACCEPTANCE
Never goes out of style



American Airlines is a trendsetter. We are the first and only airline to score 100% on the HRC's Corporate Equality Index for seven years in a row. Because doing the right thing is always in fashion.

Book now at AA.com/rainbow.™











### Lesbian print publications

- Curve (U.S.A)
- Lesbian Connection (U.S.A.)
- Go Magazine (New York City)
- Diva (U.K.)
- G3 (U.K.)
- LOTL (Australia)
- Cherry (Australia)
- Bound (International, but Australia-based)
- L-Mag (Germany)
- Dixième Muse (France)
- Zij an Zan (Netherlands/Belgium)



### Online leaders

- Go Magazine: <a href="http://www.gomag.com/blog/">http://www.gomag.com/blog/</a>
- Curve Magazine: <u>www.curvemag.com</u>
- Diva Magazine: <a href="www.divamag.co.uk">www.divamag.co.uk</a>
- L-Mag: www.l-mag.de
- LOTL: <u>www.lotl.com</u> http://lotl.fridae.com/



### Leading.

Stockholm Visitors Board

http://stockholm-gay-lesbian-network.com/lesbian-guide/

A lesbian destination guide created by a local tourism board



The Queerist One More Lesbian The Out Traveler G.P.S.\*

he L-Blog | ChicagoNow Katka-K Does London frauenzimmer

Q+ lesbian ad network

Lesbian.Pro Girlports.co. b statistics Girlports webmai

PUBLISHER LOG-IN JOIN NEWS CONTACT GAY AD NETWORK



#### Lesbian Ad Network Launch Sponsors





#### QUALITY SITES

- Premier Lesbian Brands
- Lesbian Audience Demographics
- Editorial Standards

#### **ADVERTISERS**

- ▶ Contact Our Sales Department
- Ad Specifications
- Campaign Optimization
- Service and Support

#### **PUBLISHERS**

- Apply to Join
- Make More Revenue with No Risk
- Technical Support
- Frequently Asked Questions

#### Home

#### Our Premiere Network of Lesbian Brands

Our network is growing quickly. We represent some of the largest and most respected lesbian brands in the world. New publishers are welcome to <u>submit an application to join</u> the network.

#### Contact our Sales Department



















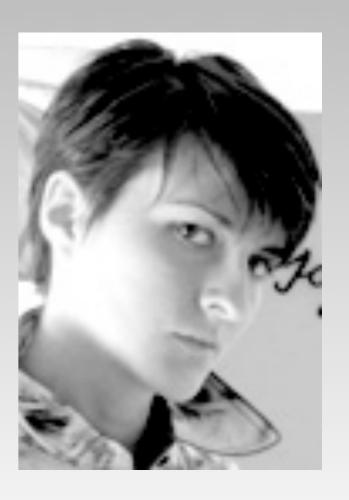






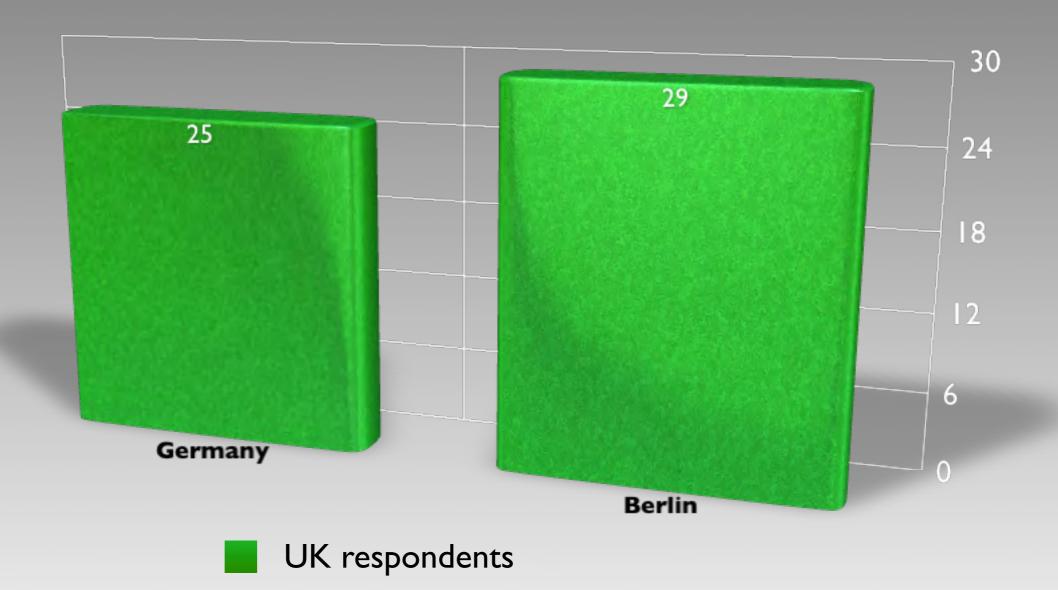
# Next Level

- Lotte Jeffs
- Out Now Global Lesbian Strategist





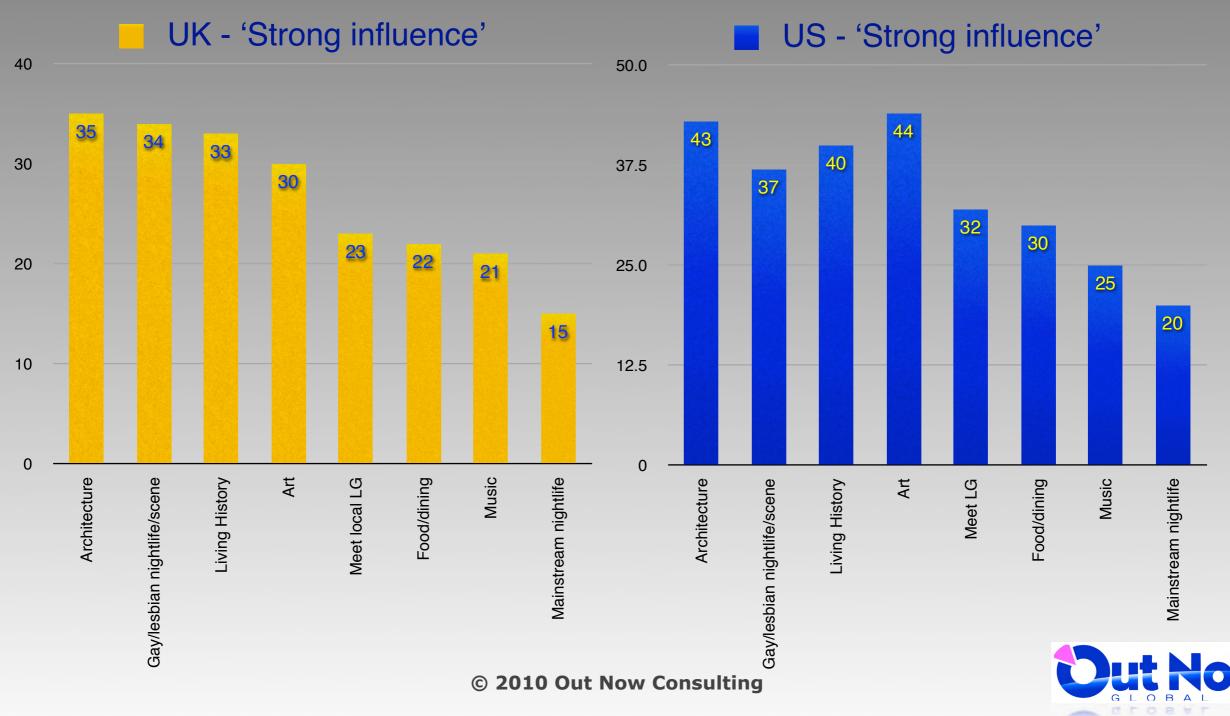
# Want to visit next 3 years



Source: 2010 Out Now Global LGBT Study



### 2010 latest data



All concepts, data, materials, strategies & forms of expression remain at all times property of Out Now.

# Berlin -

# wilk zwischen Adrenalin und

deutschen Hauptstadt!

# Chillout! Weltmetropole

### **Ralf Ostendorf**

Vice-President, Director of Sales **Berlin Tourismus Marketing** 





### Foundations

### Berlin's assets





Last century shared the worst and best of times. Future keeps getting better.

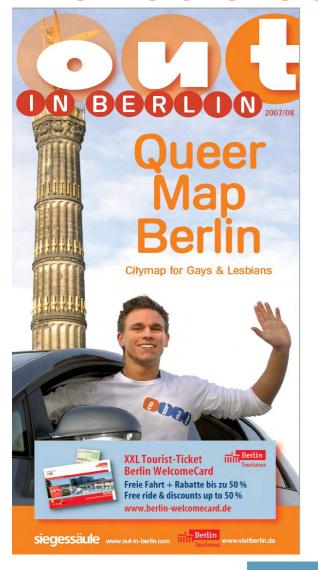






### Above and below

Holistic communications







Not old media, not new media

Just communications and consistency



### Once upon a time...

### Where do we begin?

### "Visit"

- integration of Gay/Lesbian tourism in all aspects of marketing and press activities
- special press releases for gay events
- press trips / study tours for travel agents
- Berlin presentations
- Gay Berlin part of powerpoint presentations in the UK, USA, NL, ES
- promotional literature (Queer Guide, Queer
  - Map in cooperation with Siegesäule)
- Internet
- IGLTA membership
- Foundation Member "GayComfort"





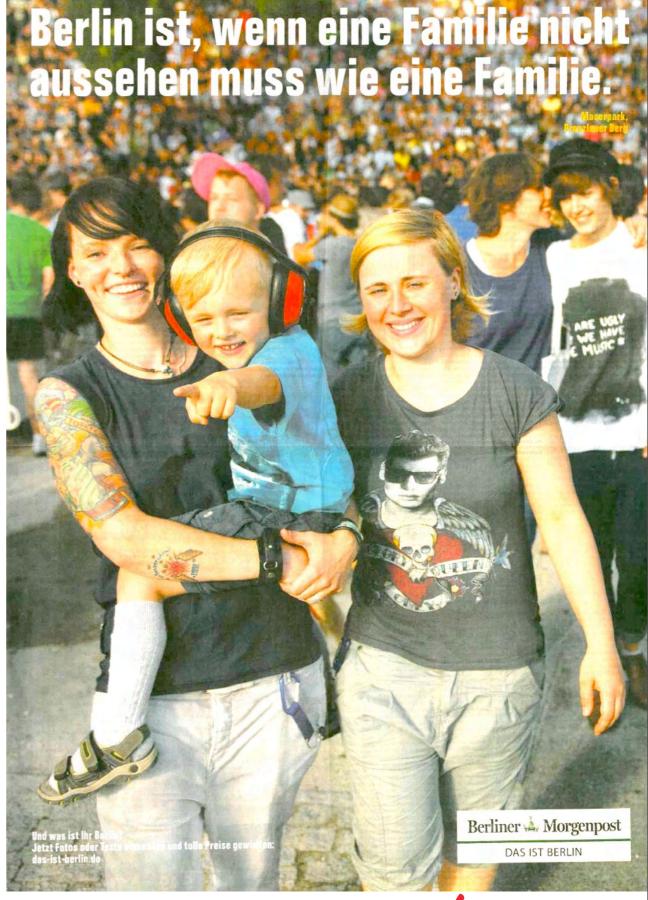


# Morgenpost Holistic communications

Not about marketing

- everything about PEOPLE and

Berliner LIFE





### Have fun Make smiles



# Not old and tired Be brave - innovate



# The L Word Getting louder

"Begine"
Club and meeting place
for women only of times

"Artemisia"
Hotel for women

"Sharon Stonewall Bar" In Kreuzberg's multi – cultural scene

> "Die Busche" Berlin's largest gay disco







## Forward-thinking Social media logic

"LGBT lives – and buys – online"

- Content is always king
- Original Berlin content online
- Blogger
- Facebook
- YouTube
- Integrate media not segregate
- Old+new+social = same thing
- It's all COMMUNICATIONS







# Forward-thinking Social media logic



#### Visit Gay Berlin



Berlin Night Watch I'm travel editor of the UK's biggest and best lesbian magazine Diva, which means when I'm not hunting down Deutschland's hot spots, I'm exploring the great and the glamorous gay scenes around the world. I've been pretty suprised by the diversity of Germany and just like...

See more

18 November 2009 at 11:18 - Comment - Unlike - Share

You and Darren Cooper like this.

Write a comment...



#### Visit Gay Berlin



Berlin Park Life Darren Cooper gives it the old razzle dazzle as he finds out just where it's all at in Berlin this August. Want to find out more...

18 November 2009 at 11:18 - Comment - Like - Share

Darren Cooper and 3 others like this.

Write a comment...



#### Visit Gay Berlin



Walls Come Tumbling Down I'm travel editor of the UK's biggest and best lesbian magazine Diva, which means when I'm not hunting down Deutschland's hot spots, I'm exploring the great and the glamorous gay scenes around the world. I know I can come across as a little flighty and shallow with all t...

See more

18 November 2009 at 11:18 - Comment - Unlike - Share

You and Darren Cooper like this.

Write a comment...





# Forward-thinking Social media logic



Visit Gay Berlin Getting to grips with all the celebrity around you in Berlin is a major step - as Joe from GT describes.



My First Time - Marlene Dietrich - Gay Berlin

www.youtube.com
Marlene Dietrich has a large role in the history of gay Berlin.
Her time there in the 1920s still resonates today. GT Joe is staying at the Arcotel Velvet Hotel
http://velvet.berlinhotels.it/

29 December 2009 at 18:14 - Comment - Unlike - Share

You, Steven Eckett and 2 others like this.



Visit Gay Berlin Joe from GT - Gay Times - discovers "White Trash" food, and where Madonna fits in.



My First Time - Eating + Shopping - Gay Berlin

www.youtube.com

Eating in Berlin covers a wide spectrum. From traditional German food to White Trash cooking. Eat. Shop. Berlin.

20 November 2009 at 06:03 - Comment - Unlike - Share

You, Darren Cooper and Pal Larsson like this.

Write a comment...



Visit Gay Berlin Life gets late - and loud - for Gay Times (GT) editor Joe, as he gets right on down into the heart of Berlin's gay nightlife scene.



My First Time - Clubbing Time - Gay Berlin

www.youtube.com

Berlin parties late and long. From DJs on the U-Bahn to clubs large and small - Berlin really knows how to do gay nightlife.

18 November 2009 at 13:25 - Comment - Unlike - Share

You and Darren Cooper like this.

Write a comment...







#### Forward-thinking

#### Social media logic

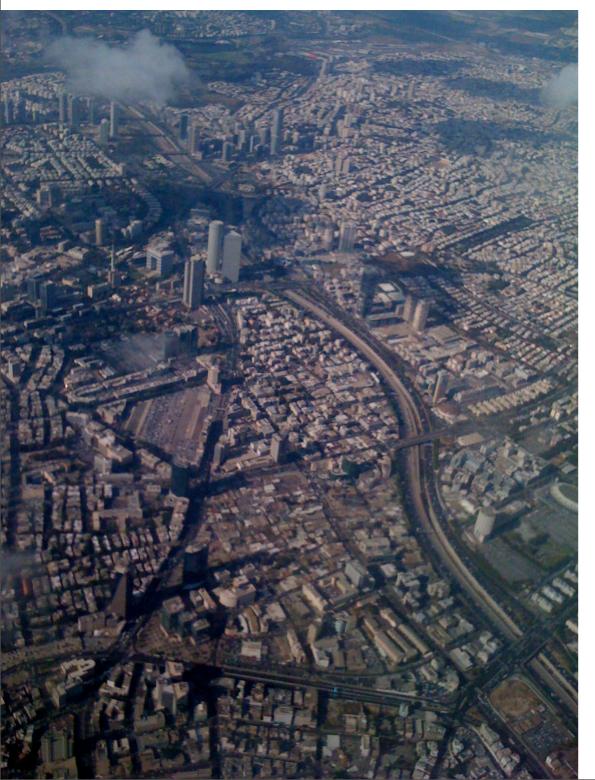




YouTube.com/MyGayBerlin



# Everywhere Let's go to Israel



## Berlin always wants to do 'what's next'



#### Chris Bekker DJ Ambassador





Brand forward
-music from
Berlin





Ongoing resource









רלין לתל אביב





#### **Building the Bridge**

Friendship initiative



Berlin supported victims of last year's shootings





#### What's next 2011 for bears and lesbians



2012 designated
Berlin Year of LGBT



#### We are how many?

Office of National Statistics (UK) 2010

= 1%

Yankelovich MONITOR study (US) 1993

= 6%

University of Indiana (peer reviewed report) (US)

= 7% lesbian

= 8% gay male



#### We live everywhere.

Argentina

Ireland

South Africa

Australia

Israel

United Kingdom

Austria

Italy

United States

Brazil

Japan

Uruguay

Canada - English

Mexico

Canada - French

Netherlands

Chile

Peru

Ecuador

Poland

France

Portugal

Germany

Spain



#### Market where?

Argentina

Ireland

South Africa

Australia

Israel

United Kingdom

Austria

Italy

United States

Brazil

Japan

Uruguay

Canada - English

Mexico

Canada - French

Netherlands

Chile

Peru

Ecuador

Poland

France

Portugal

Germany

Spain



#### Market where?

Argentina

South Africa

Australia

Israel

Ireland

United Kingdom

Austria

Italy

**United States** 

Brazil

Japan

Uruguay

Canada - English

Mexico

Canada - French

Netherlands

Chile

Peru

Ecuador

Poland

France

Portugal

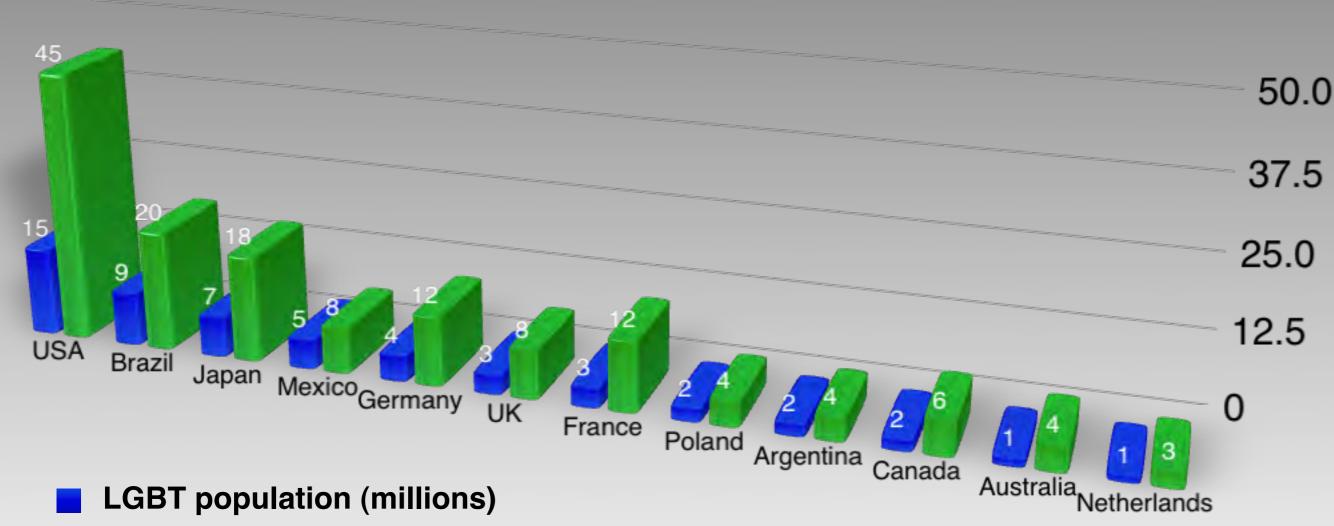
Germany

Spain



#### LGBT Market Potential. 2011.

#### Where to invest your budget?



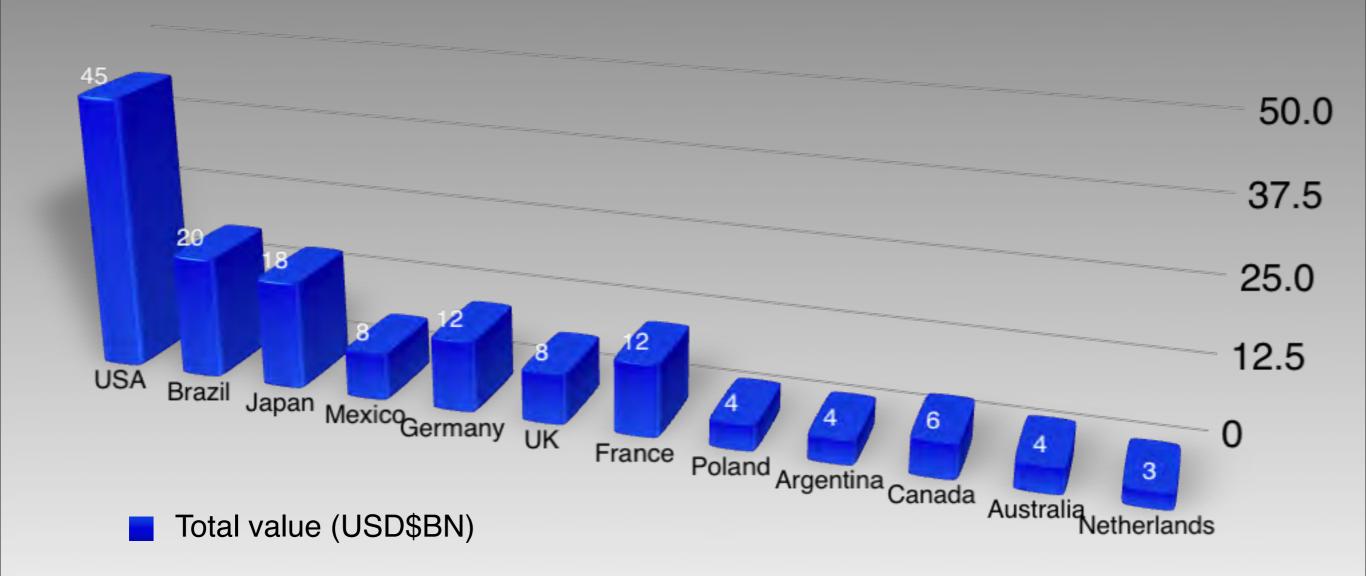
- Total annual tourism spend (USD\$BN)



Copyright: 2010 Out Now Source: 2010 Out Now Global LGBT Study

#### LGBT Market Potential. 2011.

#### Where to invest your budget?

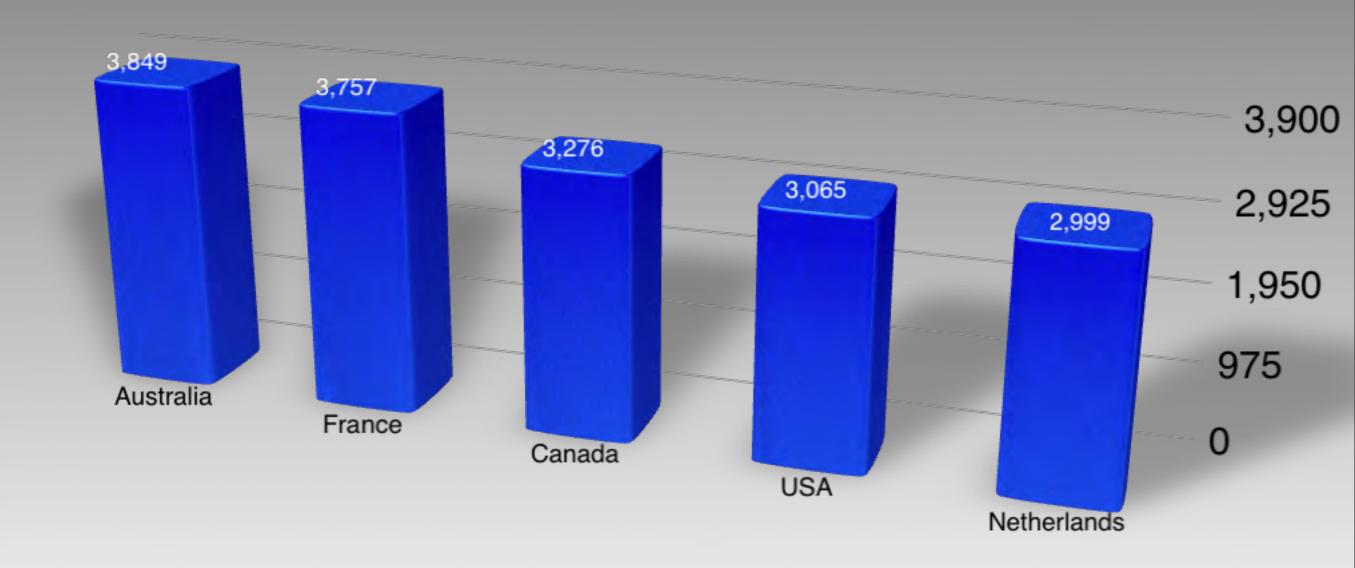




Source: 2010 Out Now Global LGBT Study

#### Per Capita Potential. 2011.

#### Where to invest your budget?



Per capita annual travel spend (USD\$)



Copyright: 2010 Out Now Source: 2010 Out Now Global LGBT Study

#### LGBT Market Potential. 2011.

#### Where to invest your budget?

	POPULATION	TOTAL VALUE	PER CAPITA
USA	1	1	4
BRAZIL	2	2	9
JAPAN	3	3	7
MEXICO	4	7	12
GERMANY	5	5	6
UK	6	6	8
FRANCE	7	4	2
POLAND	8	9	10
ARGENTINA	9	11	11
CANADA	10	8	3
AUSTRALIA	11	10	1
NETHERLANDS	12	12	5



Copyright: 2010 Out Now Source: 2010 Out Now Global LGBT Study

## NextLevelThinking.

# Coming out Coming in



# We can help you save to turn your house into your dream home.



If you're thinking of saving for the important things in life, like home improvements, we can help you do just that. From a new kitchen to re-decorating the whole house, whatever you're saving for, we have a range of ways to help you make your house your perfect home.

Lloyds TSB is pleased to help our LGBT customers with their savings needs.

Visit us in branch or call 0800 056 0025





This is now.
Lloyds
TSB.



#### This is now. 2010.





### Networking event

### IGLTA

Lo-Profile





# 84-86 Wardour Street London W1F OTQ







## LGBT2020.

# Inclusion Respect



## Argentina.

"This commercial was like looking into the future."



### Respect.





## LGBT2020.

- OutNowGlobal.com
- NextLevelThinking.com
- LGBT2020.com

info@OutNowConsulting.com





The world's LGBT marketing agency.