



# **Out Now Global LGBT Travel Industry Survey**

2016 Launch edition

# Out Now Global LGBT Travel Industry Survey, 2016

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## MANDATORY DATA CREDIT:

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DATA SOURCE: Out Now Global

The correct title of this report is properly cited as:

‘Out Now Global LGBT Travel Industry Survey, 2016’.

Report date: Second edition: February 1, 2016

Published by: Out Now  
Utrecht 3512XK, Netherlands

Author: Ian Johnson, CEO, Out Now

Edition 2

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# EXECUTIVE SUMMARY

This report is free to share provided mandatory credit is included: 'Out Now Global LGBT Travel Industry Survey'.

The link to share is <http://BetterLGBT.com>

This research comprises the responses from 661 respondents.

Key findings include:

Just under half the sample are travel agents

Most respondents work in businesses employing fewer than 20 people

Two out of three respondent organisations have considered targeting the LGBT market

A bit more than half (57%) of all respondents' organisations have ever allocated some resource to directly target the LGBT market

Most respondents (59%) report a total spend of under USD\$10,000

More than half of respondents where some activity had occurred had advertised in LGBT media

Only one in three (34%) have given staff any LGBT education training

Half of respondents undertaking some activity have used Facebook

Six out of ten (58%) of respondents undertaking activity report increased LGBT customer bookings. 39% report increased website traffic as a result and 37% experienced positive media coverage.

Only one in ten (10%) of respondents that undertook LGBT market activity report any negative outcomes.

One in five respondents (21%) felt they made mistakes when they initially targeted this market.

The most common reason given for choosing not to target this market is "we do not target any specific market segments".

The travel industry seems to provide better-than-average LGBT welcoming workplaces (based on comparing the findings of this study with Out Now LGBT2030 consumer research).

Key recommendations to others interested in this market include:

Train staff on LGBT travel concerns

Be genuinely welcoming to LGBT guests

Invest time and budget to unlock a market that is now valued at more than USD\$202 billion (source: LGBT2030 consumer spend data)



# THANKS



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## About Out Now

Out Now is an LGBT specialist agency established in 1992 in Australia. Since then, we have grown to now provide services into more than twenty countries and are the first LGBT business specialist to become truly international. Our clients include leading lights in the travel industry as well as non-travel clients. Our work is always mindful that not every business is a large one so with education and networking for businesses of all size, our [ONBC](#) free travel trade network for the industry helps travel businesses unlock the potential of LGBT tourism..



Out Now is grateful for the much appreciated support for this research provided by **World Travel Market**, our key strategic partner in this study.

World Travel Market has pioneered the ongoing development of LGBT travel globally and it has been Out Now's privilege to work with them since 2006.

We are also very grateful for the immense professionalism and support provided by two key media partners on either side of the Atlantic: **Travel Market Report** in North America and **TTG Digital** in the UK and Europe.

We look forward to continuing to work together with leading partners such as these, to continue to strengthen successful improvements to LGBT travel development, right around the world.

**LGBT travel has always existed. Now it is more visible than ever.**

# Learn. Network. Do Business.



In a world where the travel industry needs to work smarter with less resources, welcome to the 21st century LGBT travel trade networking association.

ONBC is your key to unlock a world of LGBT travel resources to expand your footprint and grow your sales. Members enjoy access to industry-leading LGBT2030 market research, webinars, white papers and video education.

Contact other members and start doing business with the power of one-click, instant ONBC networking.

**[Apply for membership.](#)**

**Free**, for the global travel industry.

POWERED BY  **Out Now**

# WELCOME

In 2016 Out Now celebrates 25 years of working in LGBT business development.

For almost half that time we have been fortunate to work with World Travel Market to help the travel industry better understand the needs and concerns of LGBT people when they travel.

This research is the first measurement of key metrics affecting the development of LGBT travel from the industry standpoint. What kinds of issues do those in the industry find pertinent in the ongoing development of LGBT travel - and what can we all learn from their experience to enhance the industry's potential to do better for this market?

One of the interesting responses to LGBT travel is 'we treat all people the same', often said in the context of explaining why a business does *not* actively target this particular consumer group. Of course the reality is quite different, as LGBT people themselves do not live in a world where all are treated with equal respect - and the sad fact is that many LGBT guests approach travel with a concern and wariness over how they will be treated.

In a world where a woman is assumed to be going to get married to a man, many LGBT people find themselves concerned that they will not get to

enjoy what everyone else takes for granted - the ability to simply relax and be themselves when they travel.

Out Now has worked for many years on developing initiatives such as [Learn.LGBT](#) online training and management workshops to help industry deliver better quality LGBT-welcoming service.



We are pleased in 2016 to bring our new consumer-facing initiative [Welcome.LGBT](#) to market - allowing LGBT people to place their holiday budget with those suppliers who do the most to ensure a genuine and warm welcome.

Finally, please do take advantage of our global [ONBC](#) travel trade networking association - it is free for the global travel industry.

It is a pleasure to present this report to you - and we hope you find it of use in your own work.

At Out Now we are so pleased to be able to work and live by our corporate mantra: LGBT spells people.

**Ian Johnson**  
CEO, Out Now



LGBT spells people

## About LGBT2030

Out Now's LGBT consumer research program commenced in 1992 and is the world's longest established continuing research into the lives of lesbian, gay, bisexual and transgender (LGBT) people.

Since 2010 we have undertaken this research globally using a series of samples employing twelve native languages and partnering with leading media and other organizations in each market we research.

This report contains data from the 2015 LGBT travel industry survey undertaken by Out Now and the Appendix includes consumer data from LGBT2030.

Recognised by

# THE GLOBAL DIVERSITY LIST

TOP 10  
DIVERSITY CONSULTANTS

SUPPORTED BY  
The  
Economist



LGBT spells people



# ABOUT THIS RESEARCH

## Industry data

The main body of this report contains the findings of the *Out Now Global LGBT Travel Industry Survey*.

Data was collected from May to November in 2015.

A total of 661 respondents took part.

Sampling was undertaken online.

Questions were both closed and open, with freeform text responses allowed where indicated (see question set extracted in Appendix 2 of this report).

The data resulting reflects the responses of those who undertook the survey. In total, respondents based in more than 90 countries took part in this research.

## Consumer data

The LGBT2030 study is focused squarely on providing world's-best data on consumer and life issues faced by LGBT people every day.

One of the hallmarks of the research is its focus upon providing a globally comparable data set able to be directly compared across countries and over time. Many of the key questions are repeated in the

studies individual samples. Some questions are replaced with new questions sample-to-sample - but always ensuring that the same questions are asked of respondents in their primary language/s.

Since commencing, the study has sampled into 24 countries globally in 12 native languages. Data has been collected and reported on in three main sample periods: 2010, 2012 and 2014 (for reporting throughout 2015).

In the immediate period ahead, LGBT2030 continues to expand its reach into new countries as well as updating its longitudinal data for many key markets.

You will find some key travel data from the LGBT2030 study in the Appendices section of this report. If you would like more specific data, please [contact Out Now](#).

The LGBT2030 study holds data on more than 100,000 LGBT respondents globally.

Out Now works with clients on original consumer panel research with these people.

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## Should it be LGBT - or LGBTI - or LGBTQ - or...?

Out Now works in more than twenty countries globally and we work hard to be as culturally sensitive as possible.

Since we were established in 1992, we have seen the description of the communities we serve evolve from 'gay,' to 'gay and lesbian,' then 'lesbian and gay,' then 'GLBT' and most recently 'LGBT'.

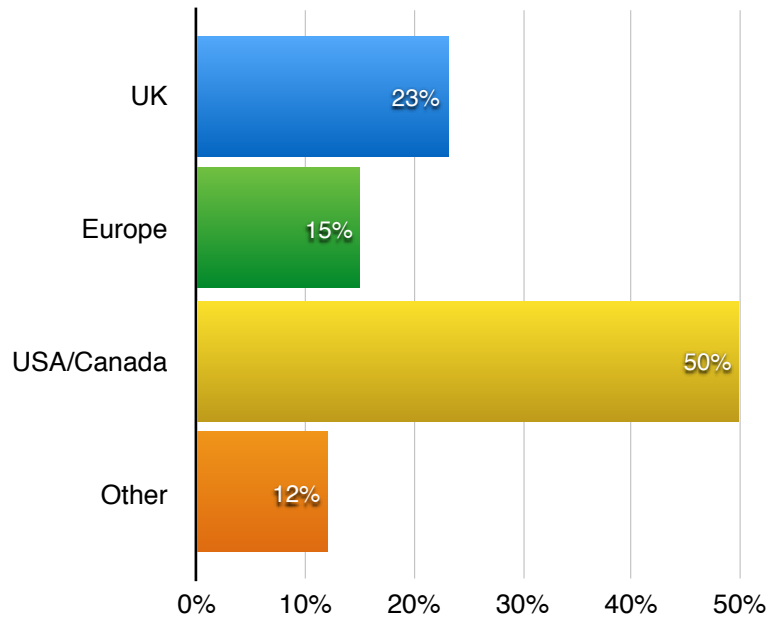
In some countries (particularly Australia) we work in, 'LGBTI' is becoming a preferred descriptor.

Non-English speaking countries often use a different version acronym.





# LOCATION



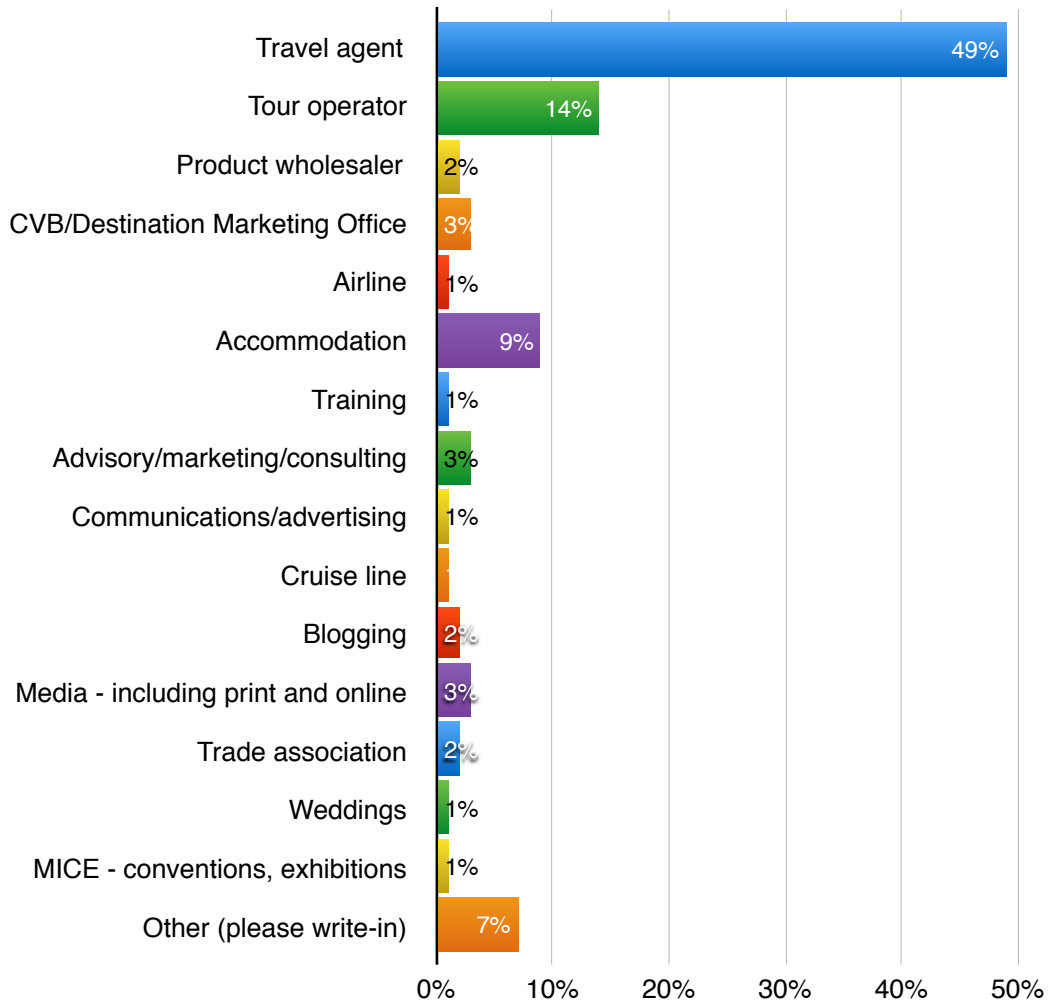
**Q1. Which location are you based in? (Please choose ONE only, which best fits or is closest)**

There are a total of 661 respondents whose responses are analysed in this study, based in regions as follows:

USA/Canada	329	respondents
UK	152	respondents
Europe	99	respondents
Other areas	81	respondents
<b>TOTAL SAMPLE:</b>	<b>661</b>	<b>respondents</b>



# WORK AREA



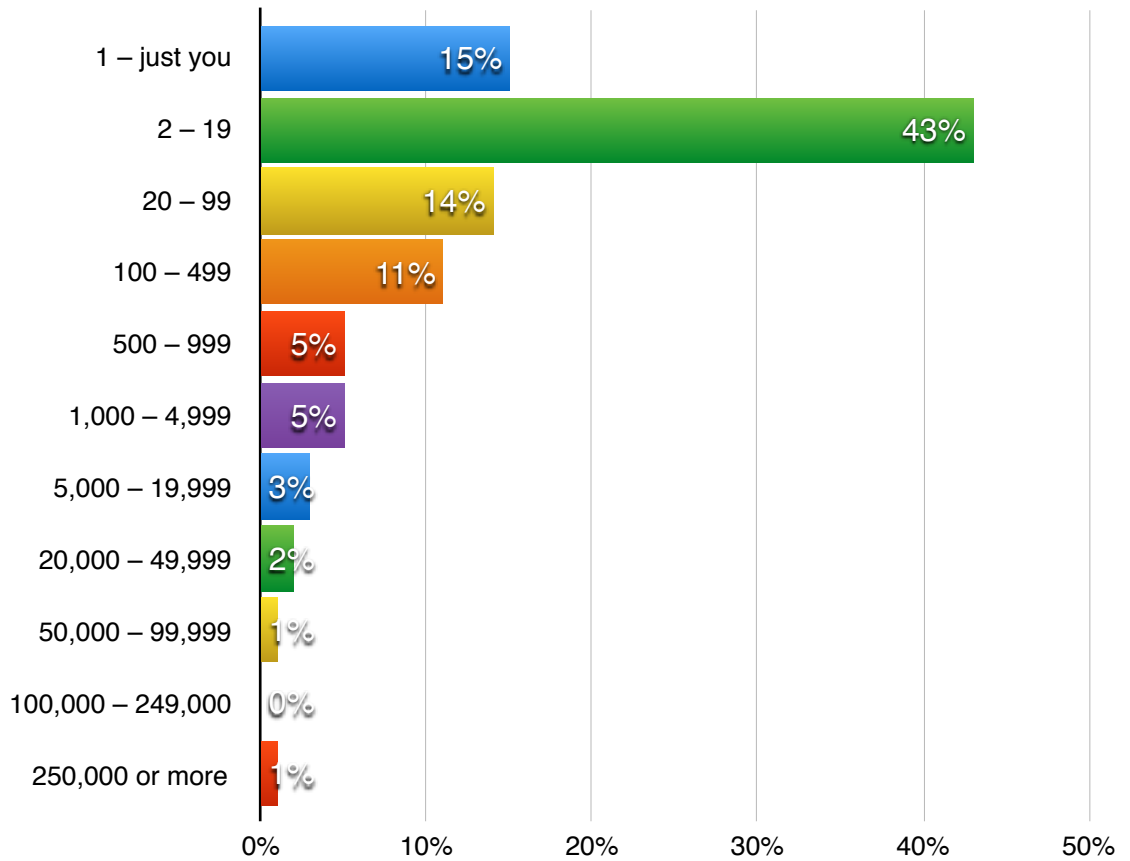
**Q2. Which category does your business best fit into?**

Almost half of all respondents are travel agents. A further 14% are tour operators.

Other categories of respondents are set out above.



# SIZE



### 2a. How many people in total work in your company?

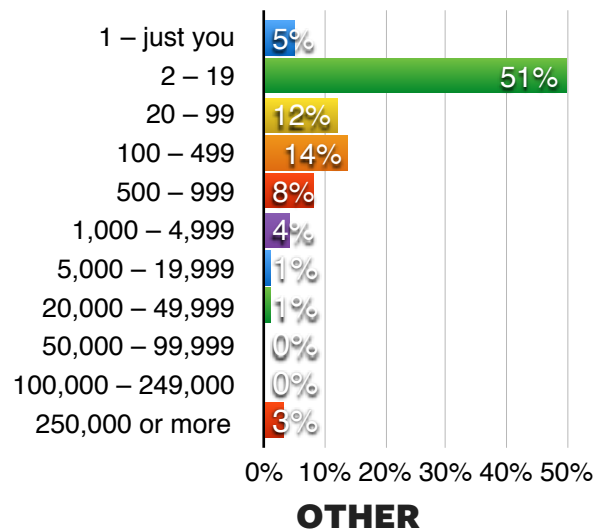
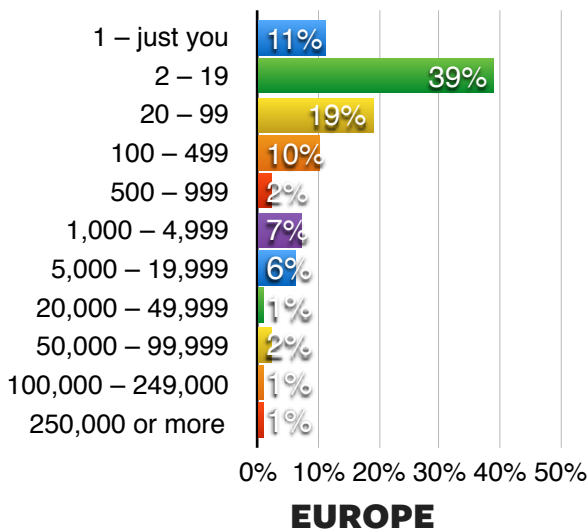
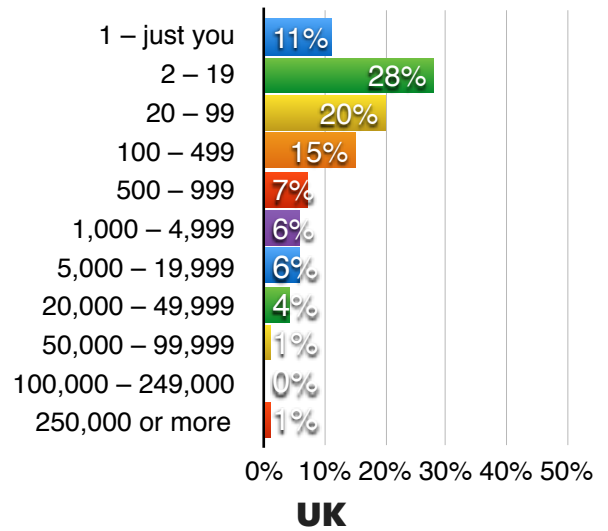
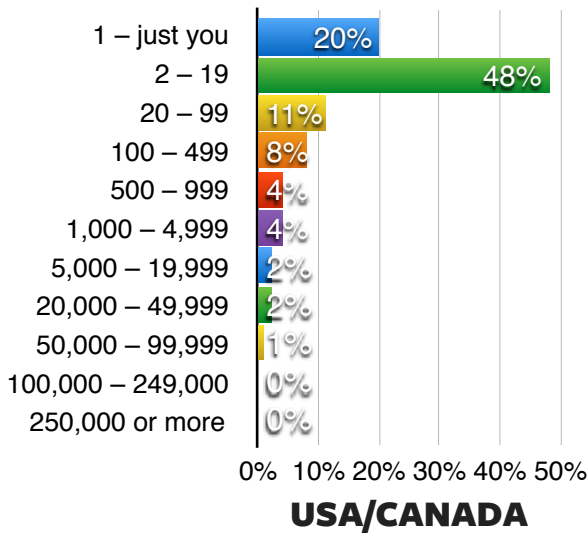
There exists an appetite to engage with the LGBT market in businesses of all sizes.

Of concern is that there are many smaller businesses that want to become involved.

This result, in part, explains why [Out Now is committed to helping](#) all travel businesses - including these smaller businesses - with information and networking opportunities.



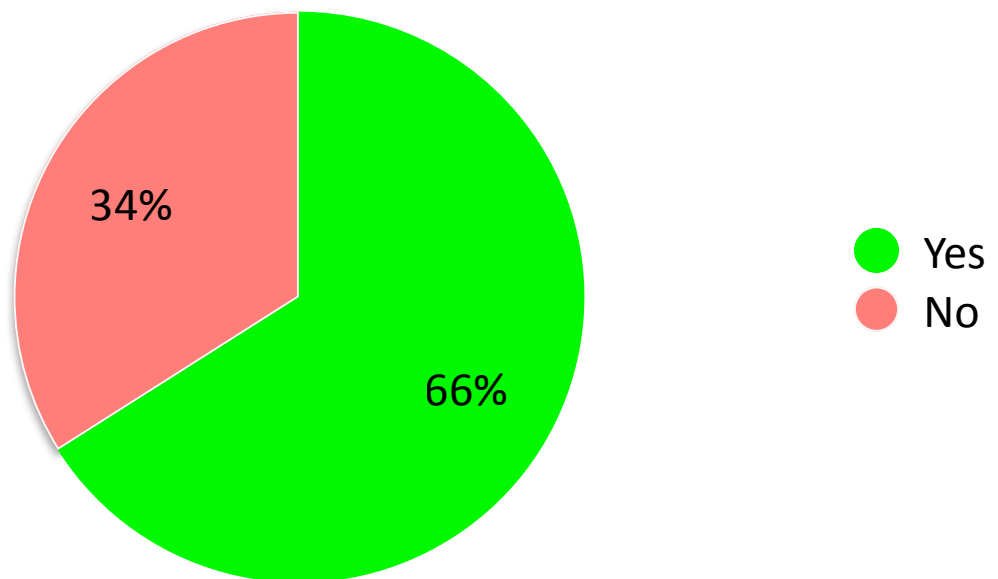
# SIZE - BY REGION



MANDATORY DATA CREDIT: Out Now Global LGBT Travel Industry Survey

# CONSIDERED

**Q5. Has your organisation ever considered targeting LGBT travel as a target market?**

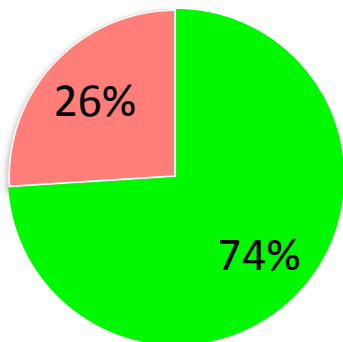


The majority of respondents have considered targeting this market.

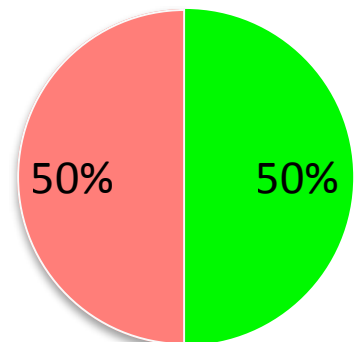
However the results on the next page show that a lesser amount have actually undertaken any activity to directly do so.



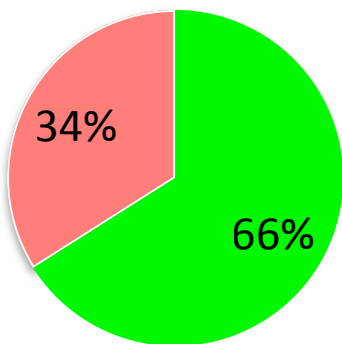
# CONSIDERED - BY REGION



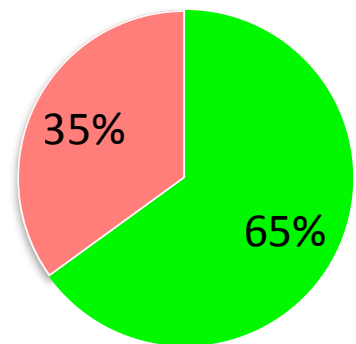
**USA/CANADA**



**UK**



**EUROPE**

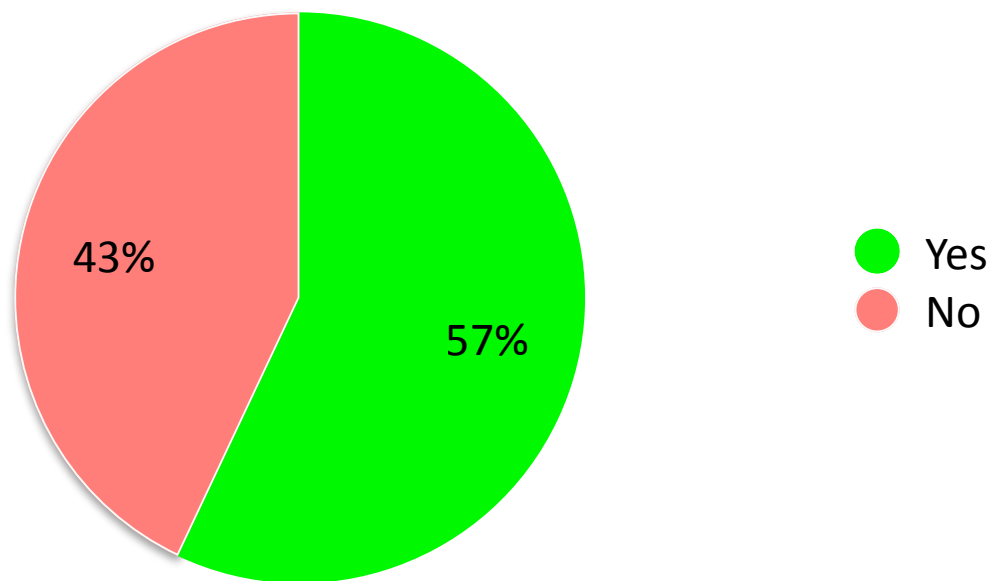


**OTHER**

MANDATORY DATA CREDIT: Out Now Global LGBT Travel Industry Survey

# INVESTED IN

**Q6. Has your organisation ever allocated some resources (budget, time, other) to directly target the LGBT market?**

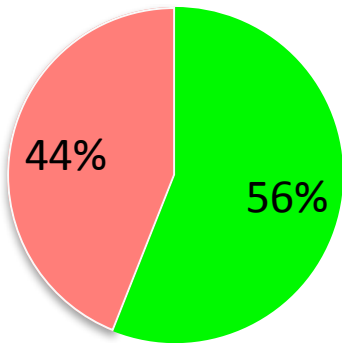


Almost half of all respondents have allocated no resource to directly target this market.

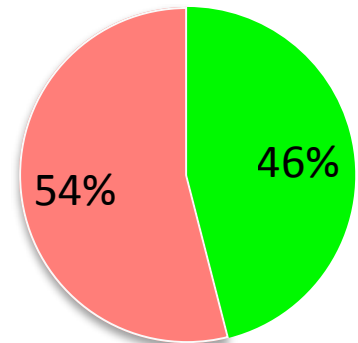
This is lowest among UK respondents (see next page).



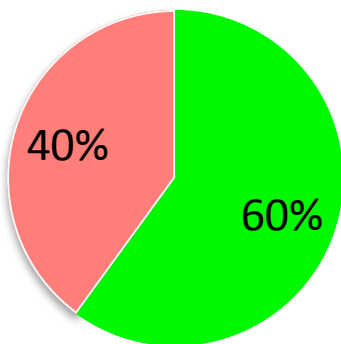
# INVESTED IN - BY REGION



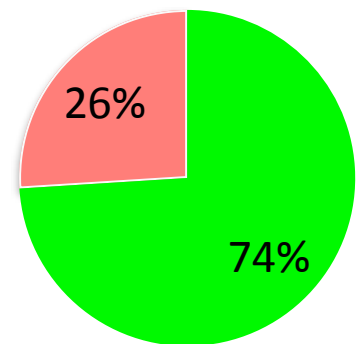
**USA/CANADA**



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**EUROPE**



**OTHER**

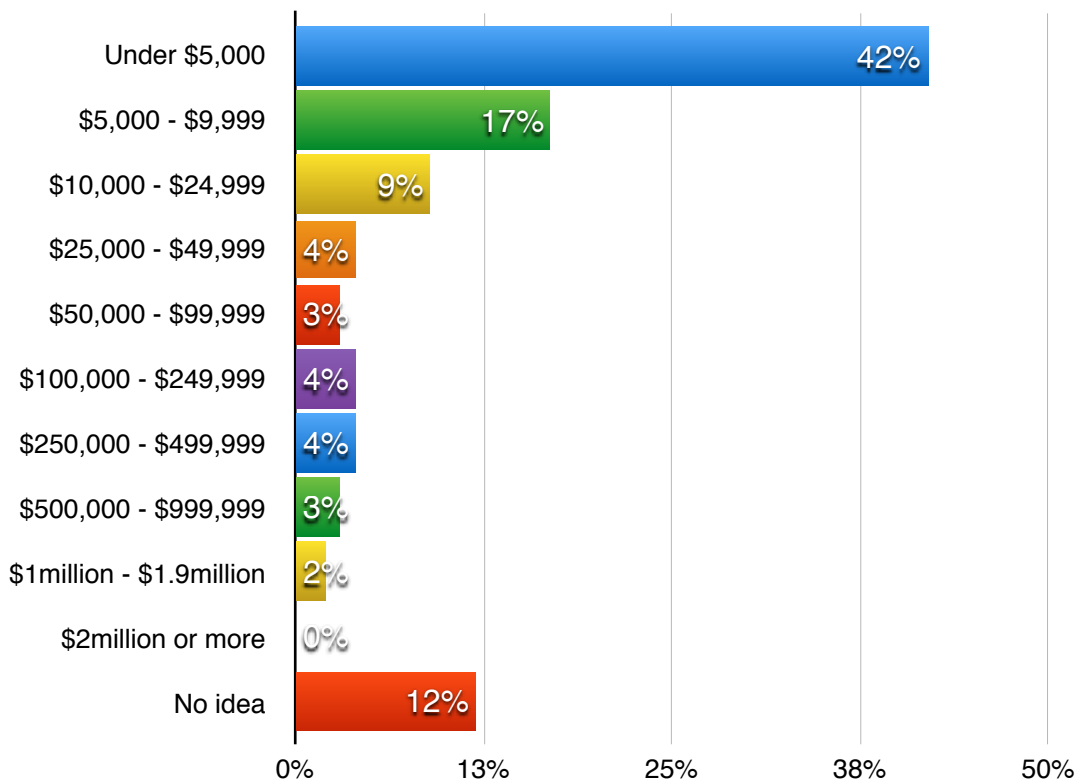
MANDATORY DATA CREDIT: Out Now Global LGBT Travel Industry Survey





# AMOUNT

**Q8. In total, how much- in USD\$dollars - would you estimate you have ever spent in total to directly target the LGBT market?**



The LGBT consumer market during 2015 spent more than USD\$202 billion on travel product globally (see Appendix 1).

Yet, almost half of all businesses responding to this research have spent either nothing (43% of all respondents).

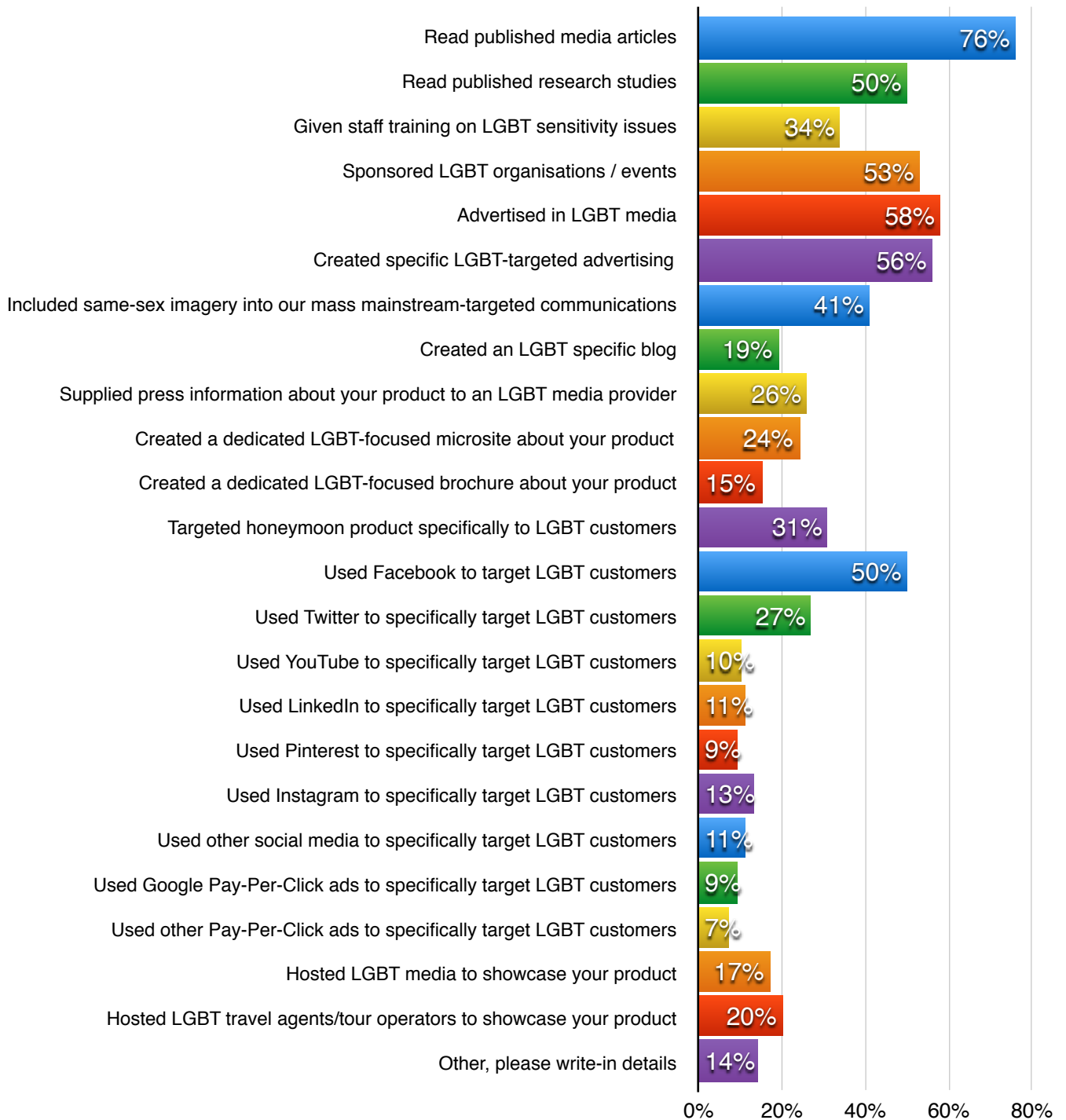
Among the remaining 57%, investment in LGBT travel marketing is typically low, with four in ten (42%) spending under \$5,000 in total and a further 17% having spent between USD\$5,000 and USD\$9,999.

Given high levels of consumer spending, Out Now considers the small investments made to be inadequate given the scale of opportunities available. Recent changes (such as 2015 recognition of equal marriage across the whole US market) are expected to see these levels increase in 2016 and beyond. It is our submission that LGBT travel marketing will become less 'remarkable' and better understood by the industry over time and this will see levels of spend more in line with the scale of the LGBT consumer market opportunity.



# ACTIVITIES

**Q9. Which of the following activities have you undertaken to develop LGBT tourism?** (Multiple responses possible, so table total exceeds 100%)

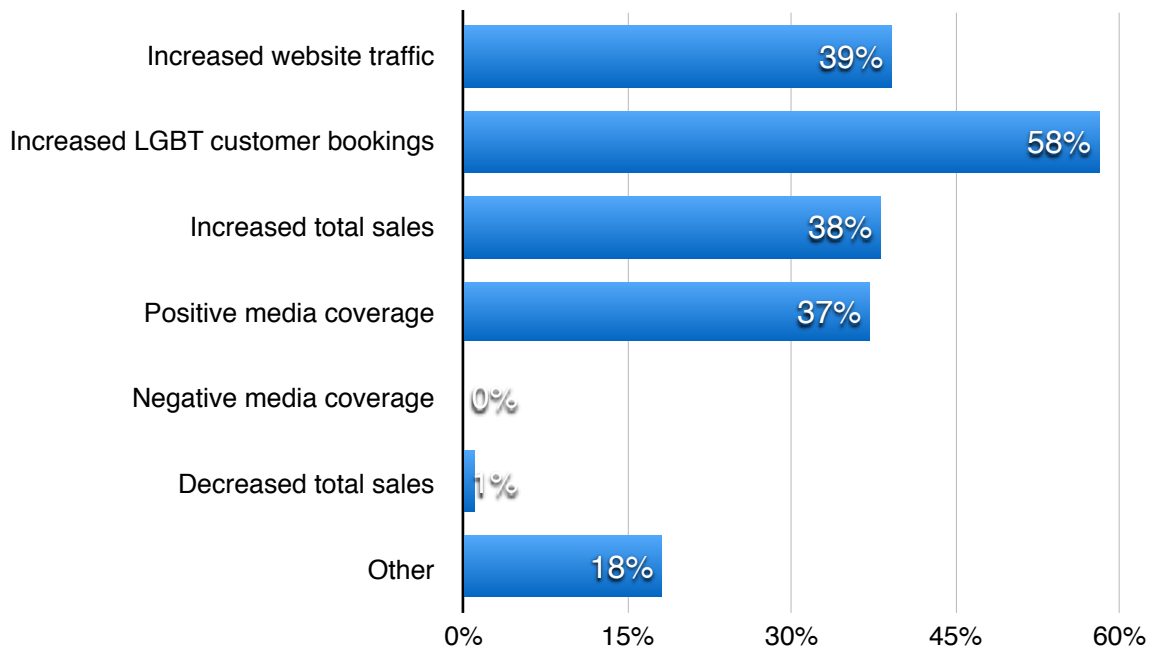


MANDATORY DATA CREDIT: Out Now Global LGBT Travel Industry Survey



# RESULTS

**Q11. Which of the following results do you think you have you seen from directly targeting the LGBT market?** (Multiple responses possible, so table total exceeds 100%)



Generally, most respondents who have undertaken LGBT marketing activity to date report positive outcomes.

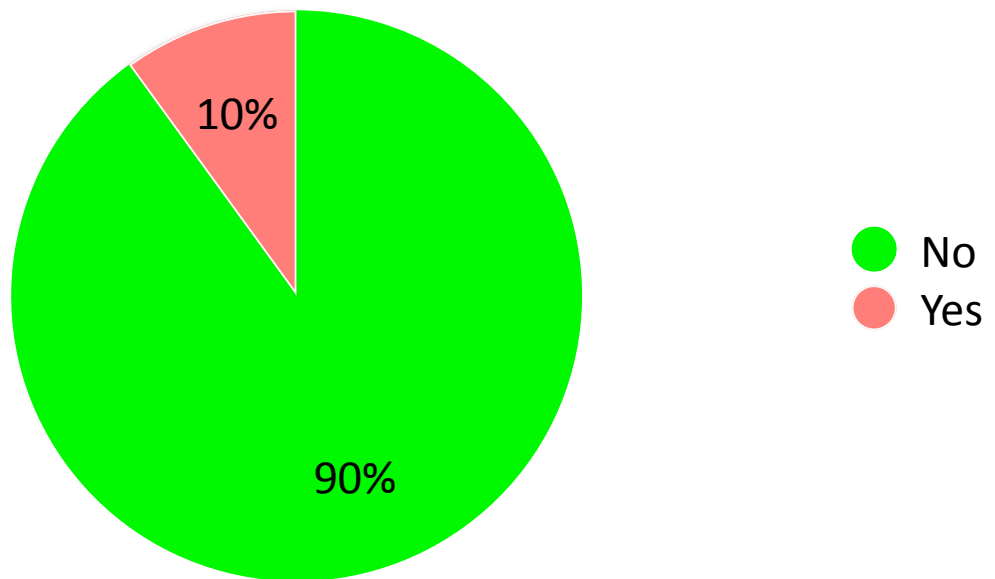
The largest outcome was increased sales to LGBT customers.

37% of respondents experienced some form of positive media coverage from targeting this market, and no respondents had received negative coverage.



# NEGATIVES?

**Q12. Were there any negative outcomes you experienced as a result of targeting the LGBT travel market?**

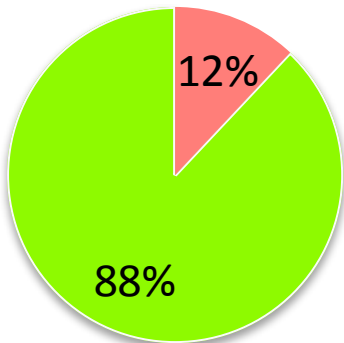


Most respondents (90%) who have undertaken any LGBT marketing activities to date report no negative outcomes as a result of doing so.

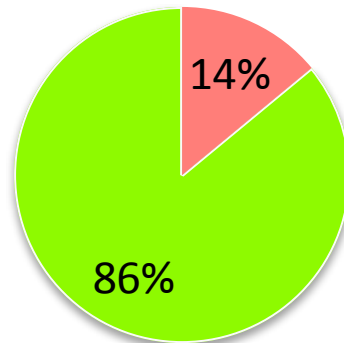
The following pages show this result by region and we also include some of the few written remarks given which outline what negative outcomes were experienced when those occurred.



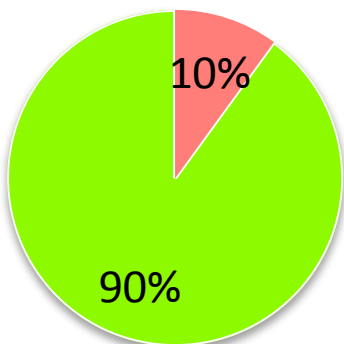
# NEGATIVES - BY REGION



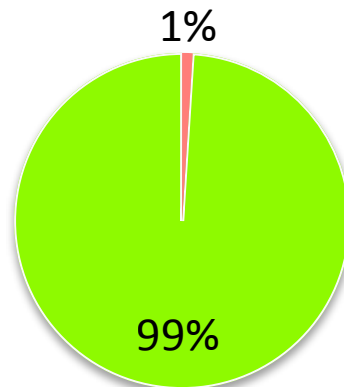
**USA/CANADA**



**UK**



**EUROPE**



**OTHER**

MANDATORY DATA CREDIT: Out Now Global LGBT Travel Industry Survey



# NEGATIVES?

**Q12. Were there any negative outcomes you experienced as a result of targeting the LGBT travel market? If yes, please write-in details.**

Most respondents reported no negative outcomes from targeting this market.

**The following responses reflect various key issues a minority of respondents identified.**

Some blinkered and closed conversations. But that happens with every sector (including river-cruising, weddings abroad etc) we operate in so is not specific to LGBT Sector. Typical responses are:

"Not my thing"

"No call for that type of holiday round here"

"Not interested"

Some internal grumbles around why, but these are easily addressed via education and information.

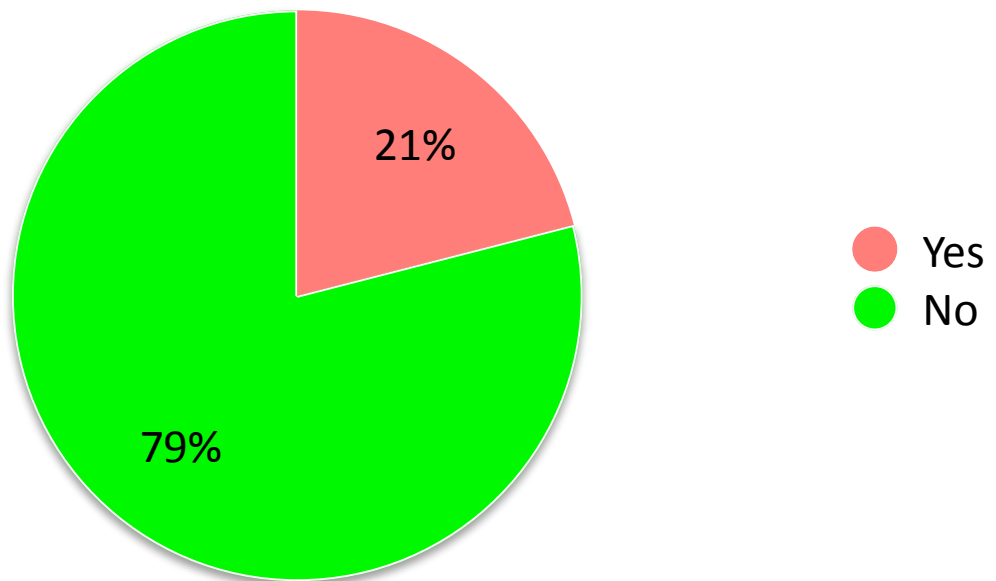
I did see a few unfollows on social media - however - I also gained. No terribly negative outcomes.

Our staff is less comfortable with two brides and doesn't know the language to say: your wife? your partner? the other bride, etc. It can be awkward at times, but we're learning and improving everyday.



# MISTAKES?

**Q13. Did you think you made any mistakes when you targeted this market initially and/or are there things you would now do differently in your approach?**



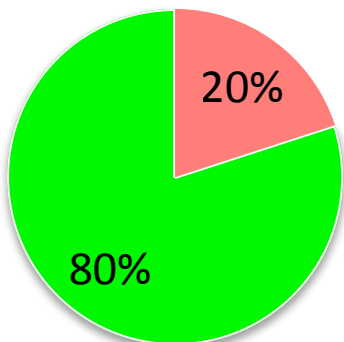
This graph presents cause for concern.

One in five respondents indicate that they consider they made mistakes when they first targeted the LGBT consumer market.

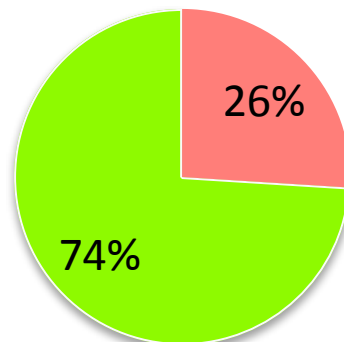
The following pages show the results by region as well as providing some key written remarks from respondents about what kinds of mistakes they made.



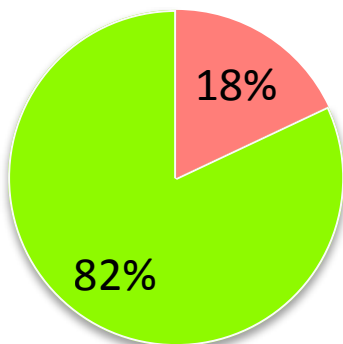
# MISTAKES - BY REGION



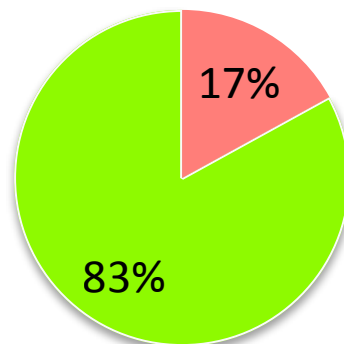
**USA/CANADA**



**UK**



**EUROPE**



**OTHER**

MANDATORY DATA CREDIT: Out Now Global LGBT Travel Industry Survey





# MISTAKES?

**Q13. Did you think you made any mistakes when you targeted this market initially and/or are there things you would now do differently in your approach? Please write-in details.**

**The following responses reflect various key issues respondents identified and which were suggested by more than one respondent in each case.**

I think we have to do a better job of our marketing strategies to this market.

Too much focus was put on sexuality and partying...Blogs were mostly targeted at gay men, less for lesbian women. Other LGBTQ+ members were not considered for the promotion.

Putting rainbow colour on websites and call it LBGT is not going to sway LBGT consumer into buying. Products are not sourced specifically for them or for their needs.

Targeting the entire market as one price point - upscale, double income. As with all markets, income and spending habits vary.

I spent too much money on working with non-profits that thought they had pull in the community.

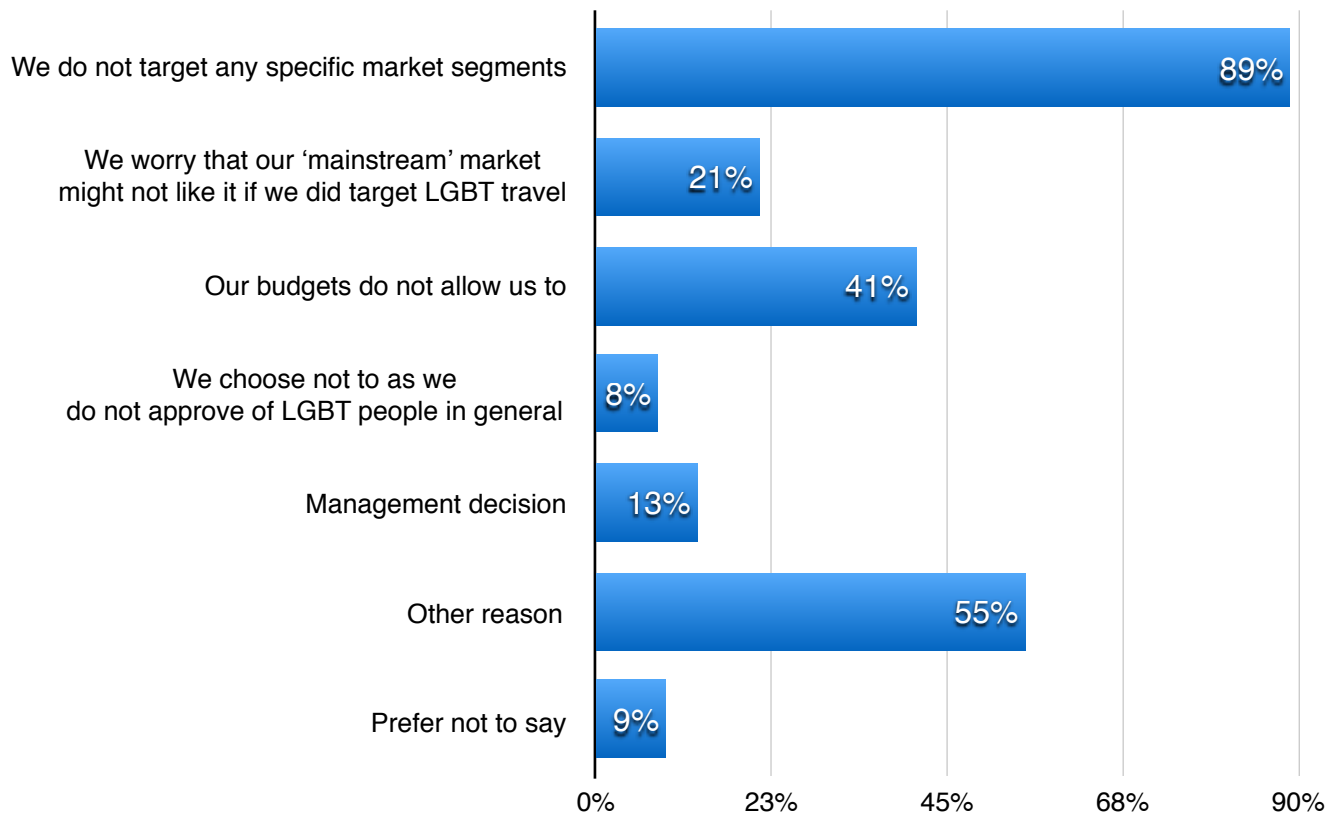
Some parts of our core wholesale market saw the product ideas as 'not for them', meaning that they didn't want to engage with the lgbt market.

Marketing is a continual learning curve, we try and improve each time we do a campaign.



# REASONS NOT TO

**Q16. Thinking of some reasons why you have not to date targeted this market, can you please indicate which of the following reasons apply: (please tick all that apply)**



The most common reasons given to *not* target this segment are:

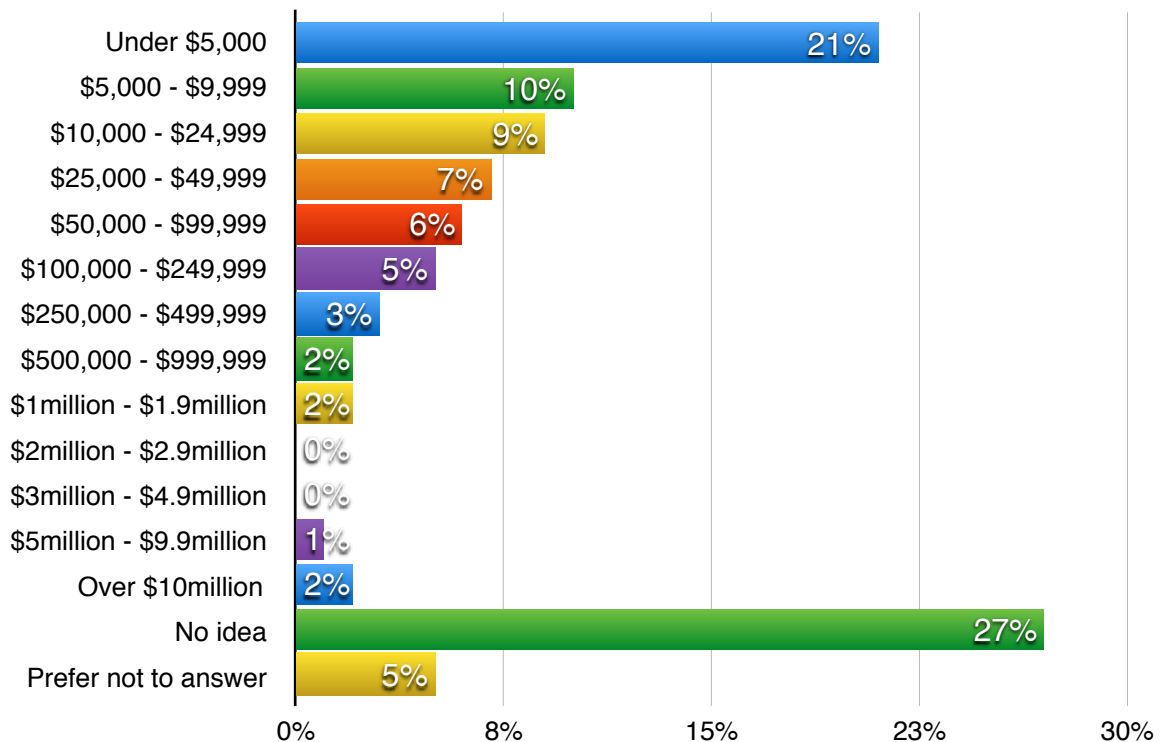
1. We do not target any specific market segments
2. "Other" reason
3. Our budgets do not allow us to.

One in five respondents (21%) are worried that mainstream customers may not like it if they did specifically target LGBT travel, however other reasons are more likely based on these results. Interestingly this concern seems not borne out by those respondents who have targeted the market - almost all of whom report no negative outcomes or negative impacts on total sales.



# VALUE TO BUSINESS

**Q17. How many dollars EACH YEAR do you think the LGBT travel market as a segment contributes in total to your organisation's annual revenues? If you are not sure, please make an estimate.**



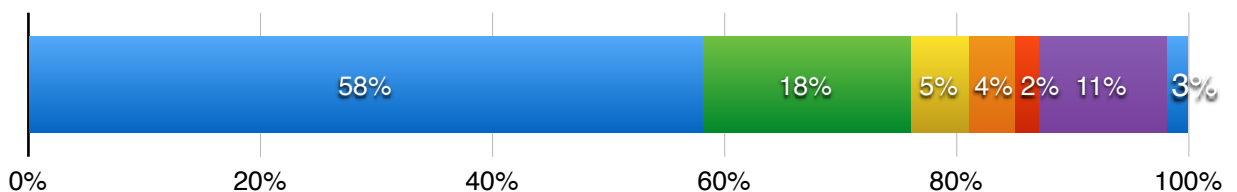
One in four respondents (27%) have no idea how much revenue is contributed to their business.

A further 21% believe the LGBT market accounts for less than USD\$5,000 to their business.



# OUT IN TRAVEL

**Q18. Thinking now of your own company, how easy is it do you think for LGBT people at your work to be completely open about their sexual orientation and/or gender identity colleagues?**



- Very easy, I think all LGBT people definitely feel able to openly be themselves at work
- Fairly easy, I think most LGBT people here feel able to be open about being LGBT
- Okay, I think about half of all LGBT people here feel able to be open about being LGBT
- Not that easy, I think most LGBT people here do not feel able to be open about being LGBT
- Very difficult, I think all LGBT people here definitely do not feel able to be open about being LGBT
- I have no idea
- Prefer not to answer

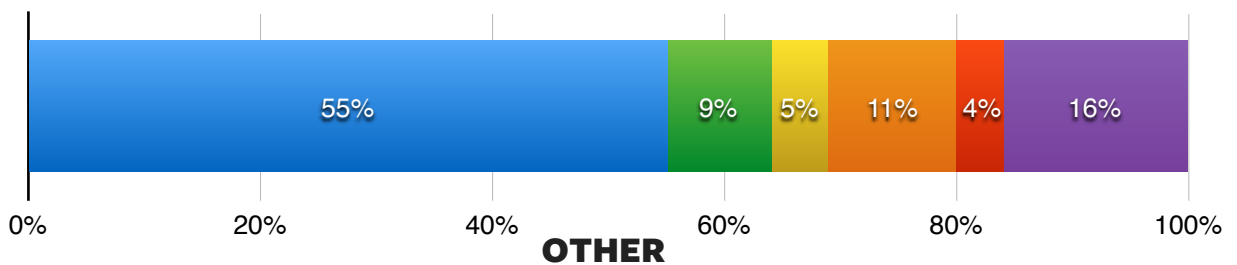
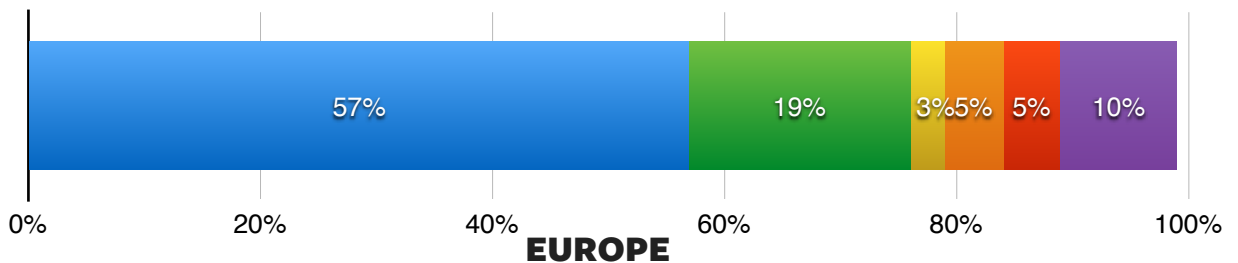
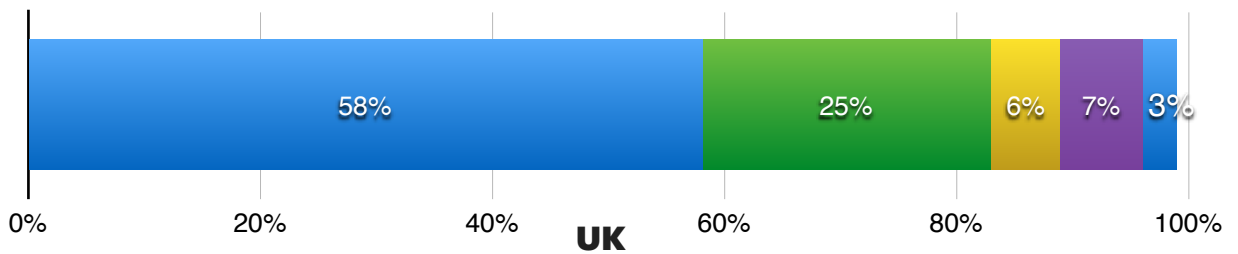
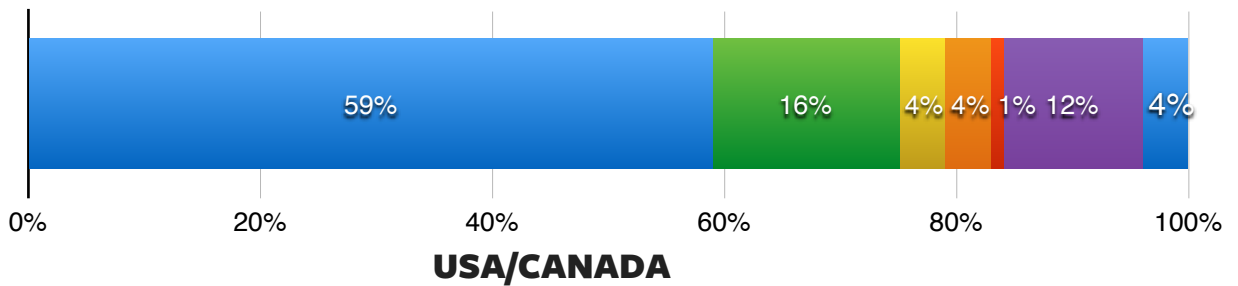
The travel industry is one that, in general, offers an easier environment in which LGBT staff feel able to be known to be LGBT at work.

Having said that, 29% of respondents think their LGBT colleagues may experience some difficulties in doing so.

The following pages show regional breakdown of this result (page 29) and also includes a table showing LGBT employee data results from eleven countries (page 30) that was derived from asking LGBT2030 respondents themselves how out they were able to be at work. Note the methodologies differ and the travel industry sample is comprised of mainly non-LGBT respondents compared to the LGBT2030 sample (which was an LGBT consumer study).



# OUT IN TRAVEL - BY REGION



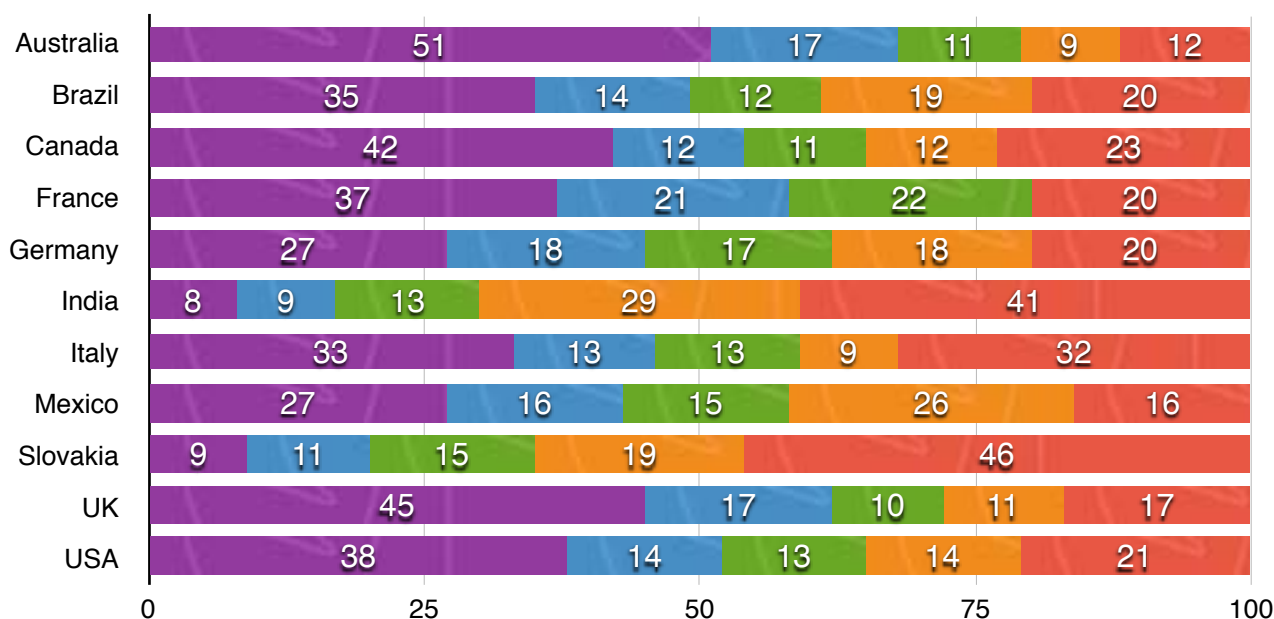
- Very easy, I think all LGBT people definitely feel able to openly be themselves at work
- Fairly easy, I think most LGBT people here feel able to be open about being LGBT
- Okay, I think about half of all LGBT people here feel able to be open about being LGBT
- Not that easy, I think most LGBT people here do not feel able to be open about being LGBT
- Very difficult, I think all LGBT people here definitely do not feel able to be open about being LGBT
- I have no idea
- Prefer not to answer

MANDATORY DATA CREDIT: Out Now Global LGBT Travel Industry Survey



# OUT AT WORK

■ Out to everyone ■ Out to most people ■ Out to some people ■ Out to few trusted people ■ Not out to anyone



### From a respondent in Mexico:

“Comentarios despectivos sobre compañeros que están abiertamente fuera del closet, o que no están fuera del closet pero que son ‘obvios’.

“Disparaging remarks about colleagues who are openly out of the closet, or they are not out of the closet but are ‘obvious.’”

**If you are working at the moment, how out are you as an LGBT person at work? (Choose the one option that most closely matches your situation)**

- I am not out to anyone at work
- I am only out to just a very few close and trusted people at work
- I am out to some of the people I work with
- I am out to most people at work
- I am out to everyone at work

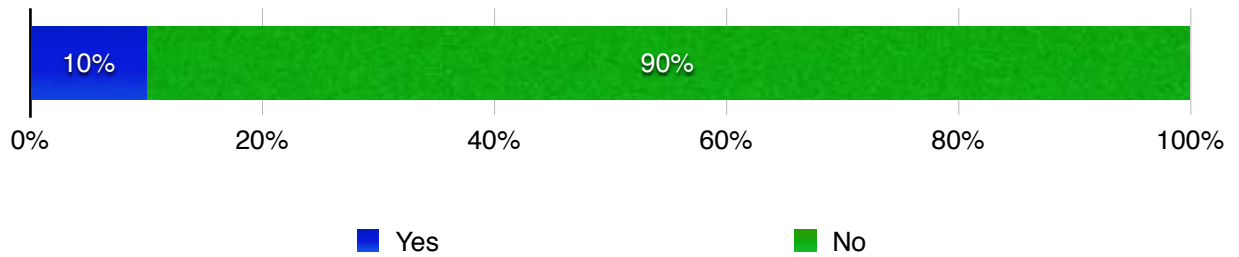
**NOTE:** This page shows data from the LGBT2030 Consumer Data Survey (2015) and appears here to compare industry results from the ‘Out Now Global LGBT Travel Industry Survey, 2016’ (which appears on pages 28 and 29 of this report). The sampling methodologies differ and the data above is from a predominantly LGBT sample, compare to the travel industry survey for which most respondents are non-LGBT.

It could be tempting to claim that Australia is a ‘poster child’ for acceptance in this instance, with fully 51% of all LGBT respondents reporting they can be out with everyone at work. This however is not the maximum reported for this metric from all LGBT2030 countries sampled to date. In 2012, the Netherlands LGBT2030 sample showed 66% of all respondents could be completely out with all colleagues at work (See related infographic in Appendix 2.) In any case, even in the case of the 2012 Dutch sample, we still see that one in three workers in Holland (34%, 2012) and almost half in Australia (49%, 2014) are unable to be out with all colleagues at work. It is clear that workers in some countries, especially India (8%), Slovakia (9%) and Brazil (20%) face substantial obstacles coming out to all at work and respondents in Italy are also relatively more likely to not be out to anyone as LGBT at work (32%). Note that the French sample included only four options for this question, as indicated in the graph above.



# HOMOPHOBIA

**Q19. Have you personally heard anything said at your work in the past year that you consider to be anti-LGBT?**



The travel industry is one where respondents are less likely to have heard anything they considered homophobic said at work during the past year.

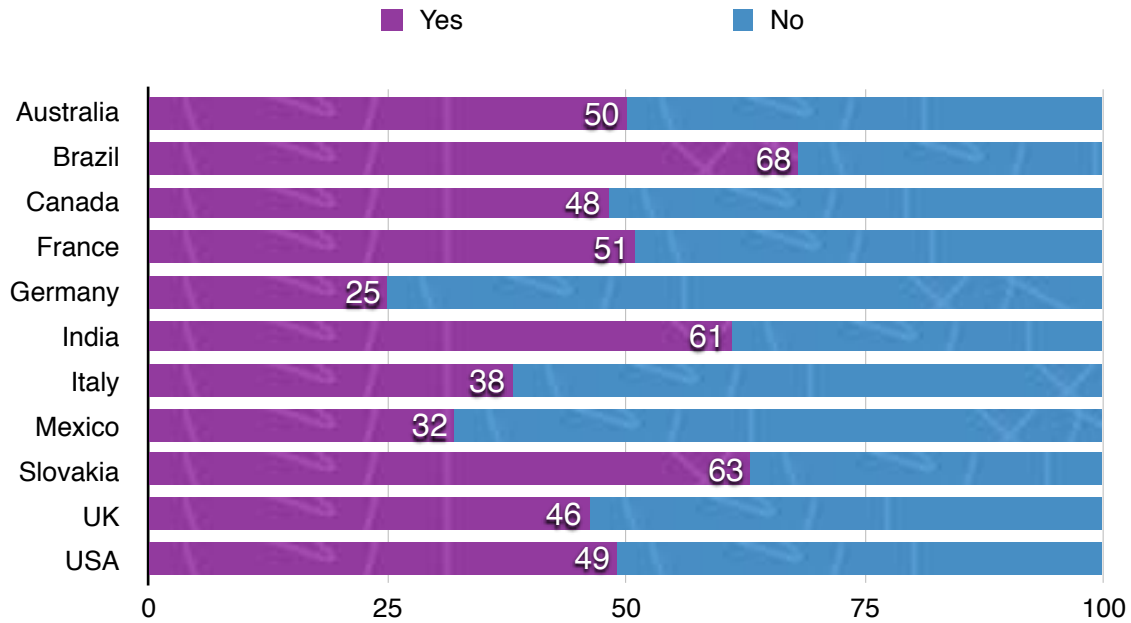
Results from LGBT2030 (consumer data) respondents (see page 32) show that LGBT people themselves working in countries across all industries are more likely than the travel industry respondents to hear homophobic ‘banter’ in their own workplaces.

It must be noted of course that anti-LGBT remarks might be less noticed by non-LGBT people which may in part contribute to the above results.

Globally, the responses in this survey suggest that the industry considers itself to be much less homophobic than do general members of LGBT communities living in the countries listed in the LGBT2030 graph on the following page.



# HOMOPHOBIA



**From an LGBT2030 respondent in Germany:**

“Ein Kollege wurde darauf hingewiesen sich in der Nähe des Arbeitsplatzes nicht zu küssen.

A colleague was told not to kiss near the workplace.”

**If you are working at the moment, have you seen or heard anything at work in the last year that you think is homophobic?**

*NOTE: This page shows data from the LGBT2030 Consumer Data Survey (2015) and appears here to compare industry results from the ‘Out Now Global LGBT Travel Industry Survey, 2016’ (which appears on page 31 of this report.*

The global travel industry survey reveals an industry which is considered to have below average levels of homophobia, compared to the LGBT2030 consumer findings. The LGBT2030 study includes a specific question on homophobia in the workplace. This question helps benchmark the prevalence of anti-gay and anti-lesbian attitudes at work.

We see that the country with the least amount of observed homophobia in 2014 is Germany. The worst is Brazil, followed closely by Slovakia and India.

Of course one is tempted to state that Germany is a standout place for the reason that it tests relatively lower on this metric.

However the reality of course is that one in every four respondents in Germany last year heard or saw something in their own workplaces they consider to be against lesbian or gay people.





# ADVICE FOR OTHERS

**Q14. What would be the key pieces of advice you would give to other organisations thinking of directly targeting the LGBT travel market Please write in as much detail as you would like to.**

**The following responses reflect various key issues respondents identified.**

Consider all stakeholders, promotion is useless without product, and product must meet or exceed all advertised and promoted information.

Everyone needs training on how to position and solicit this market. All travel planners really need to know the product (resort - cruise line - destination). Does the product present themselves as LGBT friendly b/c they really are? Or b/c they don't want to lose out on revenue?

LGBT is part of a larger diversity concept. Not only can you attract the specific LGBT market with a good campaign, but you can reap the ancillary benefit of also attracting liberal-minded consumers for whom equality is an important issue.

Train your employees in possible sensitive issues. Also the LGBT market ranges from your student backpacker through to the high end luxury market. LGBT customers tend to spend more for good service and high quality products.

Honest, diverse and inclusive marketing and media. LGBT customers have a wide range of requirements, budget, expectations and destinations, so offer everything.

Be authentic, reflect LGBT stories in your advertising and marketing campaigns, make sure your internal policies and benefits are inclusive of LGBT employees and guests.



# ADVICE FOR OTHERS

**Q14. What would be the key pieces of advice you would give to other organisations thinking of directly targeting the LGBT travel market Please write in as much detail as you would like to.**

**The following responses reflect various key issues respondents identified.**

Be authentic. Don't just tell us that you support us, show us that you support us with your policies, attention to details, customer service, etc.

Targeting the LGBT market is not purely a sales activity. It needs to be supported by the company's culture with input from all areas: Management, PR/Marketing, Operations, Human Resources. Only then can a company truly succeed in this market.

Be inclusive and show it in materials.

(Negative) attitudes about marriage equality and discrimination voiced by politicians and preachers can definitely have a negative impact!!

Be honest about your product and how it relates to LGBT visitors - and always remember that LGBT visitors are just visitors like everyone else... they may have a particular sexual orientation, but the 'triggers' for visit are generally the same.

Begin at 'home', if the community isn't welcome at work or in the destination it won't work to attract visitors.

As a business owner, I feel it's important to note that I provide services to everyone. If the organization is not terribly familiar with the LGBT market, I would encourage them to go through training prior to jumping into promoting the market. Be mindful & thoughtful and work with the LGBT market correctly. I think it's embarrassing when businesses say they want to work with the market and don't take the time to get to know what that market wants, needs and deserves.

Go for it! :) It is a thriving and exciting market.



## OTHER COMMENTS

It's a massive market so obviously a good business idea. Companies must be careful not to make LGBTs feel they are being designated as a 'sub group' where they might feel they are being stereo-typed.

Well done WTM. You should require all exhibitors to make a commitment to equality, in the same way that responsible tourism is promoted.

Have a five year plan. Do not expect immediate results, and be prepared to take losses in the first couple of years until your brand reputation is established.

I am sure there will be those who, like in their opposition to gay marriage, will voice an opinion dating back to the middle ages. The fact is, LGBT's like anyone else, are people who need and deserve to go on holiday, and if required, should have holidays specifically created where they can relax, without the fear of reprisal from someone with their children who may take offence at an LGBT couple holding hands or showing any kind of love and affection to each other, be it at the beach or in a restaurant.

Tourism has and will continue to face challenges in countries where being gay is not only not accepted but literally a crime. My son loves the Caribbean and would love to go to Jamaica, but he and his husband will not risk visiting this beautiful country because of their stance on being gay as illegal/a crime/ worthy of hate mobs attacking their own gay citizens. I'm not saying that it doesn't happen here in the US. It does. But nobody wants to worry about something like that happening when they're on vacation.

I think it's important to recognize that there are still many countries that are not LGBT-friendly. I think it's important that these countries should feel some pressure from the tourism industry to re-examine their biases and prejudices.

I think now that Gay weddings are legal throughout the US, that there will be increasing opportunities for LGBT honeymoons. I also think that as more destinations, such as Mexico, become more LGBT-friendly, that there will be increased opportunity for group travel and weddings.

I think targeting newly married and LGTB families. Weddings, LGBT friendly destinations, cruises. Probably in promoting or marketing specific tours, events, etc. tailor-made to this market. More destinations are becoming gay friendly. In many cases it is a generational issue with executives. If tourism executives are against gay marriage, gay rights, their company cannot come off as an open "welcoming to all" company and if they move ahead just to make money, they will fail.



# APPENDIX 1:

## LGBT MASTERCLASS

### 3 key industry trends in LGBT travel from Out Now

**1) Training and certification** - there have been a plethora of certification and approval schemes which bring little benefit to customers other than that a particular supplier (hotel, travel agent etc) has filled in a form saying they are “LGBT-friendly” - and usually sent a cheque to some association or company promoting the particular scheme. We take a different approach which is very much focused on the needs and concerns of individual LGBT travellers. Out Now has spent years developing an LGBT ecosystem which is centred on the travel needs of LGBT people. Training of staff is key to this. LGBT customers do not want to be treated differently but they want to be able to enjoy what everyone else takes for granted: to be able to relax and be themselves on vacation. Out Now Business Class (<http://OutNowBusinessClass.com>) delivers online training and management workshops via the dedicated <http://Learn.LGBT> platform - allowing staff to better understand how LGBT customers are the same as, and how they are different from, all other travel clients. We certify hotels globally focusing on training and to date more than 1,500 are included around the world which we promote to consumers via the <http://Welcome.LGBT> platform. We are excited that from 2016, in conjunction with Travel Market Report we are training and certifying travel agents on key LGBT consumer concerns. Consumers will also be able to find these certified agents via the <http://Welcome.LGBT> platform from the middle of next year.

**2) The growth of small business targeting LGBT customers** - the global LGBT market will be increasingly driven by SMEs (small to medium-sized enterprises). Until now, it has often been predominantly CVBs, airlines, large hotel chains and some large cruise brands that have dominated activities in the sector. Out Now sees that the majority of the travel industry now wants to be part of better serving LGBT customers, and in line with this we have seen a rapid expansion in membership in our global B2B networking system ONBC <http://OutNowBusinessClass.com> - where there are now more SME travel agents, tour operators, hoteliers and other travel suppliers than ever before. LGBT tourism is now an important part of mainstream tourism business and the industry needs to be sure to serve the needs of smaller operators to enjoy education, networking, LGBT market access - and sales. The key though is to earn and maintain a reputation as a small specialist supplier. Understanding and meeting the LGBT customers’ needs is key and will build the foundation upon which repeat and referral business can flow. We use our training and networking platforms to deliver this for the industry. ONBC <http://OutNowBusinessClass.com> now has more members than any other global trade networking association.

**3) Marriages and honeymoons** - this is a major new market which is set to grow very strongly in 2016 and beyond as more markets globally recognise the rights of LGBT people to full equality under their laws. The US Supreme Court decision of 2015 allowing marriages to be legally recognised across the US has only just begun to make the impacts which we expect will continue to expand over the next few years. Suppliers who better position to meet this market demand can expect to find a most interested consumer group.



# APPENDIX 1: LGBT MASTERCLASS

## Top 5 consumer motivators in LGBT travel

### 1. Price

**2. Welcome to be expected.** This is the number 2 factor in almost all the markets Out Now tests. (Number 1 factor is usually price).

**3. Product.** Out Now links motivating factors 2 and 3 - to create and deliver tailored product for LGBT customers via our online and management training program [Learn.LGBT](#) with welcoming suppliers then listed and found by consumers at [Welcome.LGBT](#) online portal.

**4. Communications** - An ideal campaign would see a brand or destination integrating its communications approach, using some LGBT-specific channels as well as spreading LGBT communications content through a wider variety of channels including LGBT, non-LGBT, online, print and social media.

**5. “Other”.** The LGBT market is a diverse group of customers and triggers can vary widely.

One further driver which can be noted here is in this market: “What’s Next?” Out Now research shows a high appetite for ‘discovering’ new experiences in the LGBT consumer group.

Many people within the LGBT community want to explore not just London but also Manchester and Edinburgh. As well as Berlin, this market wants to discover Frankfurt and Leipzig.

Smaller destinations and other suppliers with a story to tell can, if their story is told well, can strategically position themselves in what can be a leading-edge market for their product, with above average levels of influencers to drive sales from the broader market.

‘Bragging rights’ can often be highly prized in the LGBT market which enjoys high levels of usage and sharing via social media channels.



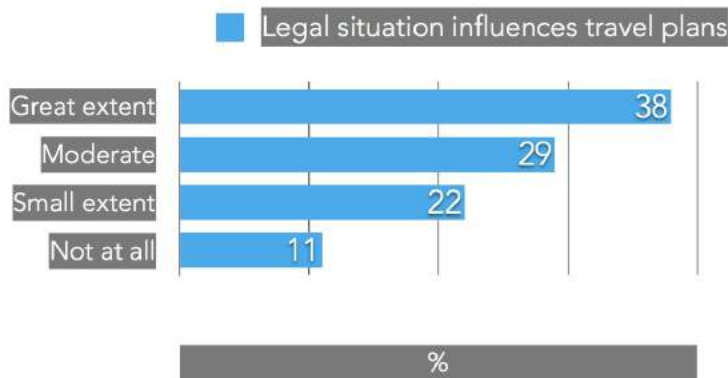
# APPENDIX 1: LGBT MASTERCLASS

## Local laws matter

### KEY DRIVERS



Q18. When you choose where to travel, to what extent can the legal situation for local LGBT people affect where you decide to go to spend your holiday/vacation?



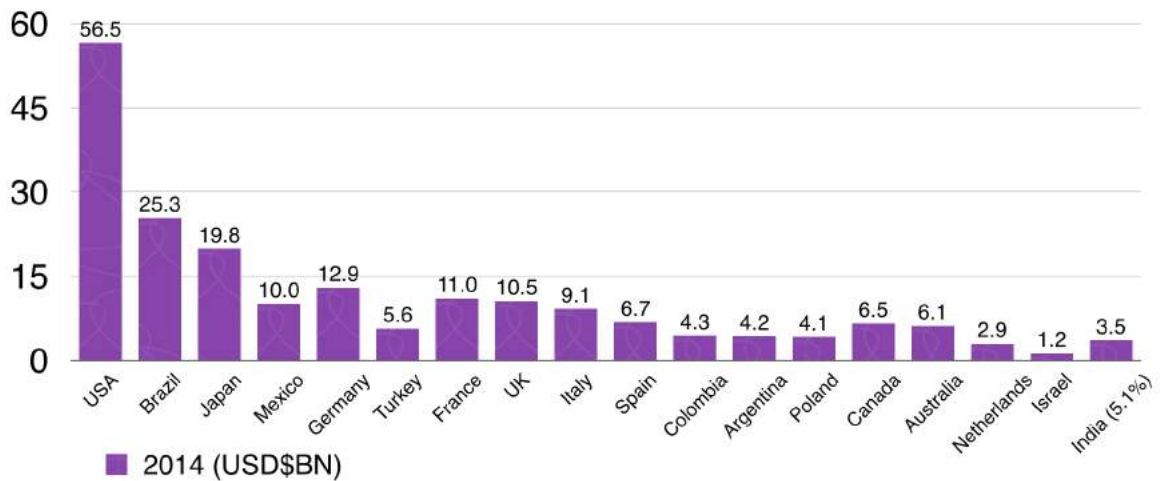
Data source: LGBT2020 - US sample - 2014  
Sample size: 2125 respondents

LGBT money is increasingly preferencing those places that respect and value - through equal legal rights - their local LGBT populations. Above is a table for for the US market showing the % of respondents to the LGBT2030 study who are now actively preferring to spend their holiday cash in places where local LGBT people enjoy equality.



# APPENDIX 1: LGBT MASTERCLASS

## Total LGBT spend - Top 18 markets globally



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# APPENDIX 2: SURVEY QUESTIONS

Q1. Which location are you based in? (Please choose ONE only, which best fits or is closest)

- UK
- Europe
- USA/Canada
- Mexico
- South America
- Russia
- China/Hong Kong
- India
- Asia
- Middle East
- Africa
- Australia/New Zealand
- Other (please specify)

Q2. Which category does your business best fit into? Please select ONE only

- Travel agent
- Tour operator
- Product wholesaler
- CVB/Destination Marketing Office
- Airline
- Accommodation
- Training
- Advisory/marketing/consulting
- Communications/advertising
- Cruise line
- Price comparison website
- Travel reviews website
- Blogging
- Media - including print and online
- Trade association
- Car rental
- Casino
- Weddings
- MICE - conventions, exhibitions
- Other, please write-in





# APPENDIX 2: SURVEY QUESTIONS

2a. How many people in total work in your company?

- 1 – just you
- 2 – 19
- 20 – 99
- 100 – 499
- 500 – 999
- 1,000 – 4,999
- 5,000 – 19,999
- 20,000 – 49,999
- 50,000 – 99,999
- 100,000 – 249,000
- 250,000 or more

Q5. Has your organisation ever considered targeting LGBT travel as a target market?

- Yes
- No branch to Qy
- Please write-in some brief details.

Q6. Has your organisation ever allocated some resources (budget, time, other) to directly target the LGBT market?

- Yes branch to Q7
- No branch to Q15
- Please write-in some brief details.

Q7. Please indicate in which years your company allocated some resources to directly target the LGBT market?

Before 2005	2005		2006		2007		2008		2009
2010		2011	2012		2013		2014		2015

Q8. In total, during that whole period, how much - in USD\$dollars - would you estimate you have ever spent in total to directly target the LGBT market? (NON-MANDATORY)

- Under \$5,000
- \$5,000 - \$9,999
- \$10,000 - \$24,999
- \$25,000 - \$49,999
- \$50,000 - \$99,999
- \$100,000 - \$249,999
- \$250,000 - \$499,999
- \$500,000 - \$999,999
- \$1million - \$1.9million
- \$2million - \$2.9million
- \$3million - \$4.9million
- \$5million - \$9.9million
- Over \$10million
- No idea



# APPENDIX 2: SURVEY QUESTIONS

Q9. Which of the following activities have you undertaken to develop LGBT tourism? (Tick as many as apply)

- Read published media articles
- Read published research studies
- Given staff training on LGBT sensitivity issues
- Sponsored LGBT organisations / events
- Advertised in LGBT media
- Created specific LGBT-targeted advertising
- Included same-sex imagery into our mass mainstream-targeted communications
- Created an LGBT specific blog
- Supplied press information about your product to an LGBT media provider
- Created a dedicated LGBT-focused microsite about your product
- Created a dedicated LGBT-focused brochure about your product
- Targeted honeymoon product specifically to LGBT customers
- Used Facebook to target LGBT customers
- Used Twitter to specifically target LGBT customers
- Used YouTube to specifically target LGBT customers
- Used LinkedIn to specifically target LGBT customers
- Used Pinterest to specifically target LGBT customers
- Used Instagram to specifically target LGBT customers
- Used other social media to specifically target LGBT customers
- Used Google Pay-Per-Click ads to specifically target LGBT customers
- Used other Pay-Per-Click ads to specifically target LGBT customers
- Hosted LGBT media to showcase your product
- Hosted LGBT travel agents/tour operators to showcase your product
- Other, please write-in details

Q11. Which of the following results do you think you have you seen from directly targeting the LGBT market? (please tick all that apply)

- Increased website traffic
- Increased LGBT customer bookings
- Increased total sales
- Positive media coverage
- Negative media coverage
- Decreased total sales
- Other key outcomes, please write-in

Q12. Were there any negative outcomes you experienced as a result of targeting the LGBT travel market?

- Yes
- No
- If yes, please write-in details



LGBT  
2030

# APPENDIX 2: SURVEY QUESTIONS

Q13. Did you think you made any mistakes when you targeted this market initially and/or are there things you would now do differently in your approach? (Remember, ALL your responses are not linked to your identity at any time)

Please write-in details.

Q14. What would be the key pieces of advice you would give to other organisations thinking of directly targeting the LGBT travel market?

Please write in as much detail as you would like to.

\*\*\*BRANCH TO Q17.\*\*\*

Q15. Why do you think your organisation has not to date directly targeted the LGBT travel market?

Please write-in some details. Remember your answers will not be linked back to you or your organisation directly.

Q16. Thinking of some reasons why you have not to date targeted this market, can you please indicate which of the following reasons apply: (please tick all that apply)

We do not target any specific market segments

We worry that our 'mainstream' market might not like it if we did target LGBT travel

Our budgets do not allow us to

We choose not to as we do not approve of LGBT people in general

Management decision

Other reason

Prefer not to say

Please feel free to write-in details

Q17. How many dollars EACH YEAR do you think the LGBT travel market as a segment contributes in total to your organisation's annual revenues? If you are not sure, please make an estimate.

Under \$5,000

\$5,000 - \$9,999

\$10,000 - \$24,999

\$25,000 - \$49,999

\$50,000 - \$99,999

\$100,000 - \$249,999

\$250,000 - \$499,999

\$500,000 - \$999,999

\$1million - \$1.9million

\$2million - \$2.9million

\$3million - \$4.9million

\$5million - \$9.9million

Over \$10million

No idea

Prefer not to answer



# APPENDIX 2: SURVEY QUESTIONS

Q18. Thinking now of your own company, how easy is it do you think for LGBT people at your work to be completely open about their sexual orientation and/or gender identity colleagues?

Very easy, I think all LGBT people here are definitely able to openly be themselves at work

Fairly easy, I think most LGBT people here are open about being LGBT

Okay, I think about half of all LGBT people here are open about being LGBT

Not that easy, I think most LGBT people here are open about being LGBT

Very difficult, I think all LGBT people here are definitely not open about being LGBT

I have no idea

Prefer not to answer

OPTIONAL Please write-in some brief details

Q19. Have you personally heard anything said at your work in the past year that you consider to be anti-LGBT?

Yes

No

OPTIONAL Please write-in some details

Q23. Please write in your own words, what do you think are the three biggest OPPORTUNITIES the tourism industry has in the next five years in developing LGBT travel?

Q24. Please write in your own words, do you think are there any DIFFICULTIES the tourism industry is likely to face in the next five years in developing LGBT travel?

Q25. Are there any other comments at all you would like to make about targeting the LGBT travel market?

# Walk the talk. Benchmark.



Leicester Partnership NHS Out Now

Q23: Please indicate whether you agree or disagree with each of the following statements. Remember your responses are completely confidential and are not to be linked to you individually. Your work will NOT be advised of your specific responses to any questions in this survey.

	Strongly disagree	Slightly disagree	Neither agree nor disagree	Slightly agree	Strongly agree
This is not a supportive place to work					
This is a great place to work					
I'm supported professionally, but I don't feel supported as an LGBT individual at work					
I don't really feel that I fit in that well in my workplace					
I'm thinking of leaving this job in the future					
I love my job and have no plans to leave					
This is a workplace entirely free of homophobia / biphobia / transphobia					
I sense a level of homophobia / biphobia / transphobia in my workplace but it DOES NOT affect how I feel about work					
I sense a level of homophobia / biphobia / transphobia in my workplace and it DOES affect how I feel at work					
If I come out at work, I think it might have an effect on my progression for promotion					
I feel my work colleagues treat me with respect as a productive and valuable member of the team					

Continue

Day-to-day, what matters most to your LGBT workforce is not how much your company scored on a workplace index. Far more important to productivity and staff retention is what it feels like to be openly LGBT in your workplace. Out Now's Corporate Benchmark Audit is an insightful diagnostic measure that allows you to know how your workplace compares to national LGBT2030 averages, across key diversity metrics.

Beyond indexing: this is next level diversity to chart your optimal tactical paths to growth.

Exclusively from Out Now, for corporate leaders.



LGBT spells people

Allies matter.  
Here's how much.

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**ALLIES**  
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**Friends**

Out Now redefines diversity insights, with the first ever measurement of those key issues currently being faced by LGBT Allies in the workplace – and their most effective methods to respond.

Releasing globally, from March 2016.

[Learn more now.](#)

The logo for Work.lgbt features the word "Work" in a blue sans-serif font, followed by ".lgbt" in a grey sans-serif font. A small pink triangle is positioned above the letter 'k' in "Work".

POWERED BY The logo for Out Now features the words "Out Now" in a grey sans-serif font. A small pink triangle is positioned above the letter 'O' in "Out".



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**“DATA SOURCE: Out Now Global LGBT Travel Industry Survey, 2016.”**

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