

# The \$180-billion dollar question “How is a gay traveller different to any other traveller?”

The global potential value of the lesbian, gay, bisexual and transgender (LGBT) leisure travel market is set to reach a record USD\$181 billion in 2013. CEO and founder of Out Now, Ian Johnson, shares some of the findings of the world's biggest global research initiative into LGBT markets.



ut Now is conducting the world's biggest global research initiative into LGBT markets. LGBT2020, which measures consumer spend, purchasing habits and brand

preferences across 22 countries, is the world's largest LGBT research study ever undertaken. Each year, as part of the ongoing research project, Out Now measures the value of the global LGBT tourism industry, which hit a record US\$180 billion in 2013.

For the past three years, the market has grown at a faster rate than the general travel and tourism market. LGBT2020 has measured a net expansion exceeding 7% annually since 2010 – as more consumers become

part of the reachable LGBT market. As well as a growing accessibility for LGBT markets globally, another key reason for this trend is an increasing willingness among LGBT people themselves to ‘come out’ and join this reachable LGBT market. Increasing access to LGBT consumers through defined channels to market is also driving growth. As more people around the world find they enjoy general community support, this increasing above-average rate is likely to continue.

The two top spending markets are the US (US\$52.3 billion) and Brazil (US\$22.9 billion) and the fastest growing markets are Mexico and Brazil. In terms of the trends developing over the coming years, Out Now anticipates that the LGBT market can confidently be

expected to outperform the general market as a result of both supply and demand factors.

As more LGBT people feel comfortable self-identifying as LGBT they become both more visible to – and reachable by – tourism marketers. Additionally, the immense growth in travel companies targeting the segment has meant it is no longer a difficult decision for organisations to decide to target LGBT people. The market has more double-income households without children and has a demonstrated propensity for leisure travel – LGBT tourism is a market trend with quite some way to run in terms of growth rates and total market expansion.

In the UK market more than one in five lesbians is already a mother so knowing

# Luxury honeymoons



The global growth in gay and lesbian honeymoons is one of the hottest growth trends in the dynamic LGBT market. As more destinations – such as the UK and France – introduce marriage equality laws, many LGBT people are rushing into wedlock, with a profound impact for the tourism industry.

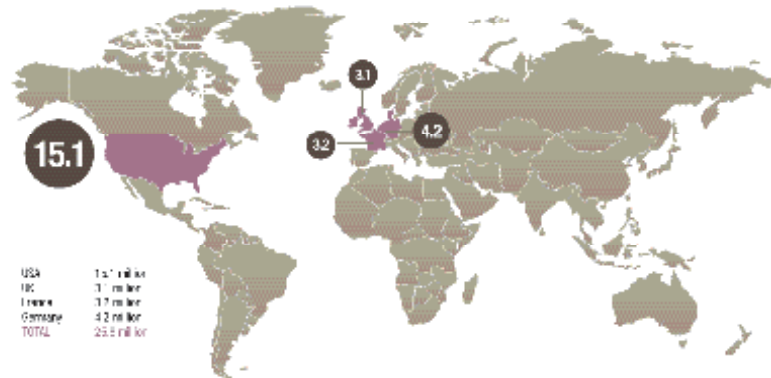
More gay and lesbian weddings clearly lead to more lesbian and gay honeymoons and already some key trends have developed in the 12 or so years since the Netherlands became the first place to introduce equal marriage to all its citizens.

The Out Now LGBT2020 global research initiative reveals that the global honeymoons market is big – and getting bigger.

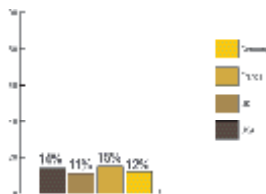
## LGBT2020: Do you want to get married?

(Source: Out Now Global www.OutNowConsulting.com)

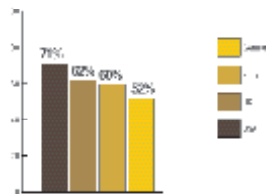
### TOTAL GAY/LESBIAN POPULATION (in millions)



### ALREADY IN UNION/MARRIAGE



### HOPE TO MARRY IN FUTURE



In the US, UK, France and Germany there are more than 16 million gays and lesbians hoping to marry.

Out Now is premiering its latest addition to its ONBC Training system during WTM 2013 – in the form of the new ONBC Honeymoons training module. This new training contains a wealth of practical information to help the industry provide great products and services that really understand gay and lesbian weddings and honeymoons.

this and targeting family-relevant product to these customers can also be a smart move. For 2014, Out Now is especially focused on providing strong business-to-business products to help clients deliver superior product to consumers via the most effective channels.

Previously, LGBT travellers tended to use specialist travel companies to plan their holidays. This is now changing, with far fewer LGBT operators, and mainstream suppliers working harder than ever before to understand how to meet LGBT consumers' travel needs. Mainstream travel companies are beginning to better understand the LGBT market, and to create more inclusive marketing strategies.

"How is a gay traveller different to any other traveller?" The answer varies according to where they are travelling from and to, but some common concerns abide. For example, today in America, only 44% of LGBT are 'out' to all the people in their workplace. But when on holiday they often need to 'come out' repeatedly, especially if travelling as a couple. From the point at which they book with their travel agent, to arriving at the hotel and encountering a variety of staff – at the restaurant, ordering room service, checking in – LGBT couples are presented with multiple situations in which they must declare their status. They want to behave like any other couple without feeling that their environment is inhospitable. And yet, less than half Americans are 'out' where they work, a surprising figure amongst people they actually already know! What should be a relaxing holiday can often be a series of 'coming out' moments, which can be stressful if you aren't comfortable that staff are gay friendly. This is a holiday reality for almost all gay and lesbian people, especially those that travel with their partner, and one that Out Now works with the industry to help address, especially through training.

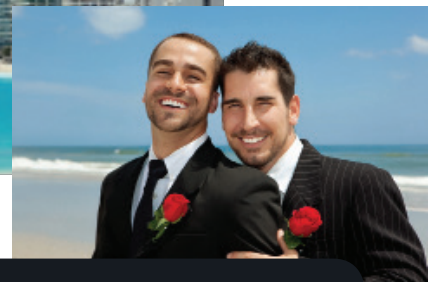
More lesbians and gay men are now choosing to not hide their true selves on holiday. The industry has to prepare to



## JW Marriott Resorts Cancun, Mexico

45 managers from key customer areas at the JW Marriott Cancun Resort & Spa and CasaMagna Marriott Cancun, Mexico, attended a dedicated Spanish-language workshop, and 850 resort staff received online training. Patricia Trejo, Training & Quality Manager with JW Marriott, explains:

“Out Now Business Class has been a real solution for Marriott in helping our managers understand the more detailed issues of training that help us deliver superior service as well as the ONBC online training in Spanish. This has now been used by more than 800 of our team in both of our Cancun resorts to make sure the customer-facing staff our guests connect with are able to deliver for them the very best levels of welcoming service. ONBC Training has been key to this for us at Marriott in Cancun.”



make sure that the promises made to gay and lesbian tourists in advertising pitches are delivered in terms of a genuinely welcoming and relaxed experience. A growing number of mainstream travel companies work with Out Now to focus both on crafting effective representational communications strategies, as well as increasingly understanding the imperative need to provide product with well-trained staff to deliver on their marketing promises. One of the key implications here is the provision of well-designed staff training.

Out Now has created the world's largest global LGBT tourism networking association, ONBC - Out Now Business Class. ONBC delivers online staff training for members in four languages (Spanish, French, English and German) to customer-facing staff working in the travel industry worldwide. For management, ONBC delivers free access to the LGBT2020 research for more than 20 key markets globally, connecting them with key decision-makers and LGBT media products globally. ONBC has partnered with the world's leading travel agent resource OTT, to deliver complimentary training to agents working in markets around the world and connect them to customers.

Using region-targeted marketing packages, we teach relevant communications that accurately portray the high quality of product on offer, are genuinely empathetic to consumer concerns and truly LGBT-welcoming. Research shows that consumers select from hotels, destinations and travel agents that not only want their custom, but that demonstrate the understanding that gay and lesbian people want what everyone else wants when they travel – to relax and feel comfortable truly being themselves when they are on holiday. The training is proving to be very powerful. Clients not only deliver better products, they reach a global audience of consumers wanting to buy these products, a win-win for industry suppliers and LGBT customers alike.

The objective of ONBC's staff training program is to ensure a staff understands LGBT customers' specific concerns, and can effectively communicate that they are comfortable with LGBT guests. Managers can access networking and additional education tools allowing them to have the best possible insights into the latest trends and data in this dynamic market. Out Now also delivers bespoke workshops for management in strategic locations for clients globally. ■

## Biog Ian Johnson

Ian is the founder of Out Now, and has for two decades been recognised as one of the world's foremost authorities on marketing to lesbian, gay, bisexual and transgender (LGBT) customers.

Out Now Global has been relied upon by many of the world's leading brands including Lloyds Banking Group, Barclays, Citibank, Hilton Hotels, IBM, Toyota, TUI, German National Tourist Office, Lufthansa, Merck; and delivers a comprehensive range of tailored solutions focused on research, strategy, communications and training.

With consulting activities across more than 20 countries – including the US, Canada, UK, Netherlands, France, Spain, Italy, Germany, Israel, Mexico, Brazil, Argentina, South Africa and Australia – Out Now fulfills a unique global agency vision as being the leading local LGBT marketing specialists, worldwide.

The Out Now Global LGBT2020 Study sees the agency continuing to break new ground, with the world's most comprehensive research analysis ever of LGBT people's lives – delivering insight about people living in 25 countries, right across the world.

For the world's best business-to-business networking LGBT trade association, join Out Now Business Class

[www.OutNowBusinessClass.com](http://www.OutNowBusinessClass.com)

For more information, visit

[www.OutNowConsulting.com](http://www.OutNowConsulting.com)

[www.OutNowBusinessClass.com](http://www.OutNowBusinessClass.com)

[www.LGBT2020.com](http://www.LGBT2020.com)

[YouTube.com/GayMarketing](https://www.youtube.com/GayMarketing)

[facebook.com/GayMarketNews](https://www.facebook.com/GayMarketNews)



## Useful resources

Interested in learning more? Visit the ONBC LGBT Village at stand **EM1555**, or go to: [www.OutNow.travel](http://www.OutNow.travel) or [www.outnowconsulting.com/lgbt2020](http://www.outnowconsulting.com/lgbt2020)