



World Tourism Organization

UNWTO

Global Report on LGBT Tourism

AM Reports: Volume three



Index / Highlights

Major trends in world tourism: overview

page / 04

The economics of LGBT tourism

page / 08

The social impact of LGBT tourism: why welcoming LGBT travellers is not just good for business

page / 10

LGBT rights and the United Nations

page / 12

Emerging trends in LGBT tourism

page / 14

Proud LGBT destinations

page / 16-33

Business Case Studies

page / 34-36

Destination survey: How do UNWTO and IGLTA members reach out to LGBT consumers?

page / 37

New UNWTO publications

page / 38-40

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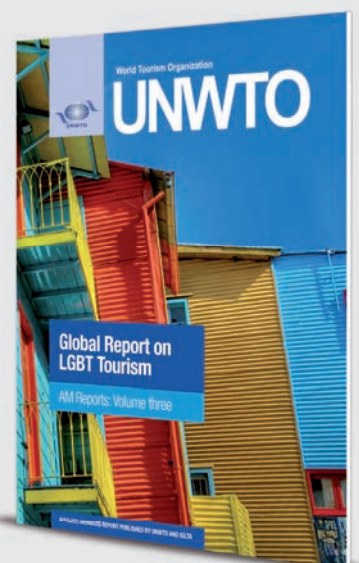
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World Tourism Organization (UNWTO)



Director, UNWTO Affiliate Members

Foreword: Javier Blanco



The UNWTO Affiliate Members Programme is proud to present this Global Report on LGBT Tourism, part of our series of AM Reports. With the knowledge and support of the International Gay and Lesbian Travel Association, as well as the UNWTO Affiliate Members, this report examines LGBT tourism from a social, political and economic perspective.

As the articles from our contributors demonstrate, in recent years many advances have been made in legislation around the world to accord equal rights to LGBT people, resulting in economic benefits in a range of sectors, not least in tourism. Indeed, the UNWTO Global Code of Ethics for Tourism makes clear that tourism is 'an irreplaceable factor of self-education, mutual tolerance and for learning about the legitimate differences between peoples, cultures and their diversity'.

However we must not forget that many LGBT people across the globe continue to suffer from repression and homophobia. As a specialized agency of the United Nations, UNWTO stands behind the direct appeals made by the UN Secretary General to "repeal of laws that criminalize homosexuality, that permit discrimination on the basis of sexual orientation or gender identity or that encourage violence, calling on the international community to stand against

discrimination, to defend our fellow human beings and our fundamental principles"

discrimination, to defend our fellow human beings and our fundamental principles". The case studies and commentaries featured in this report demonstrate the clear relationship between countries' progressive policies towards LGBT people and the economic benefits for their tourism sector. However, the social benefits are becoming clearer too, as more and more destinations are benefitting from the associated brand image of tolerance, inclusiveness and diversity.

I would like to thank all the Members of UNWTO and IGLTA for their lively and engaging case studies and commentaries. I would also like to thank IGLTA for their support in this initiative as well Peter Jordan of the UNWTO Affiliate Members Programme for coordinating the report. We look forward to learning from your own experiences in working with the LGBT market on

www.platma.org / www.unwto.org

* See article "The UN and LGBT rights" p. 13



President/CEO, International Gay and Lesbian Travel Association

Foreword: John Tanzella



The International Gay and Lesbian Travel Association (IGLTA) proudly became the first gay organization to receive Affiliate Member status in the World Tourism Organization (UNWTO) in November 2010, and so it's with great excitement that we embark on our inaugural collaboration together. This report aims to educate and engage tourism leaders around the world regarding the global impact of lesbian, gay, bisexual and transgender (LGBT) travel.

Certainly, from an economic point of view, there has been much discussion of this market. Estimates place its annual worldwide economic impact at more than 140 billion USD. But equally important are the social implications of supporting a strong, healthy LGBT travel

market. By reaching out to gay travellers and creating a welcoming infrastructure, tourism businesses are helping to combat homophobia.

Through the following case studies, you'll connect with destinations (both established and emerging), airlines and travel agents who have benefitted from their outreach to LGBT travelers. You'll also find the latest trends within this burgeoning industry.

We are grateful to the UNWTO for this opportunity to expand the minds of tourism professionals globally and thank the many members of our industry who contributed to this report.



The International Gay & Lesbian Travel Association is the leading member-based global organization dedicated to LGBT tourism. Its mission is to create value for LGBT travellers and expand LGBT tourism globally by demonstrating its significant social and economic impact. Founded in 1983 with 25 members, IGLTA now has a truly global presence with more than 2,200 dues-paying member businesses. The association represents LGBT and LGBT-friendly accommodations, destinations, service providers, travel agents, tour operators, and events, as well as the LGBT travel consumers they wish to serve. Comprised of a staff of seasoned executives, a governing board of directors and 28 ambassadors representing 25 countries and regions, IGLTA serves its membership through a wide range of events, educational and networking opportunities, digital platforms, and an annual global convention.



Major trends in world tourism: overview

“ For many developing countries tourism is one of the main sources of foreign exchange income and the number one export category, creating much needed employment and opportunities for development. ”

The role of tourism in development, prosperity and well-being

Over time, an ever increasing number of destinations have opened up and invested in tourism development, turning modern tourism into a key driver of socio-economic progress through the creation of jobs and enterprises, infrastructure development and the export revenues earned.

As an internationally traded service, inbound tourism has become one of the world's major trade categories. The overall export income generated by inbound tourism, including passenger transport, exceeded US\$ 1 trillion in 2010, or close to US\$ 3 billion a day. Tourism exports account for as much as 30% of the world's exports of commercial services and 6% of overall exports of goods and services. Globally, as an export category, tourism ranks fourth after fuels, chemicals and automotive products. For many

developing countries it is one of the main sources of foreign exchange income and the number one export category, creating much needed employment and opportunities for development.

An increasingly important influence on the global economy

Based on the currently still fragmented information from countries with data available, tourism's contribution to worldwide gross domestic product (GDP) is estimated at some 5%. Tourism's contribution to employment tends to be slightly higher and is estimated in the order of 6-7% of the overall number of jobs worldwide (direct and indirect). For advanced, diversified economies, the contribution of tourism to GDP ranges from approximately 2% for countries where tourism is a comparatively small sector, to over 10% for countries



where tourism is an important pillar of the economy. For small islands and developing countries, or specific regional and local destinations where tourism is a key economic sector, the importance of tourism tends to be even higher.

Current situation in world tourism

Recovery from the global financial crisis

In 2010, world tourism recovered more strongly than expected from the shock it suffered in late 2008 and 2009 caused by the global financial crisis and economic recession. Worldwide, international tourist arrivals in 2010 reached 940 million, an increase of 6.6% over the previous year. According to the UNWTO Tourism Highlights 2011, the vast majority of destinations reported positive and often double-digit increases, sufficient

to offset losses or bring them close to this target.

2011 overview

Contrary to the trend in recent years, growth in arrivals during the first eight months of 2011 was higher in advanced economies (+4.8%) than in emerging ones (+4.2%), due largely to the strong results recorded by Europe (+6%). In Northern Europe (+6%) and Central and Eastern Europe (+9%), the recovery which began in 2010 gained momentum this year. The same is true for some Southern European destinations (+8%), which this year also benefited from the shift in travel away from Middle East (-9%) and North Africa (-15%).

Since the beginning of the year, most emerging economies have continued to prosper, while most advanced economies – apart from the ‘newly industrialised’ economies of Asia –

“ Worldwide, international tourist arrivals in 2010 reached 940 million, an increase of 6.6% over the previous year. ”

International tourism by region of origin and mean of transport

Rank					
	Series	Million		Change (%)	
		2009	2010*	09/08	10*/09
France	TF	76.8	76.8	-3.0	0.0
United States	TF	55.0	59.7	-5.1	8.7
China	TF	50.9	55.7	-4.1	9.4
Spain	TF	52.2	52.7	-8.8	France
Italy	TF	43.2	43.6	1.2	0.9
United Kingdom	TF	28.2	28.1	-6.4	-0.2
Turkey	TF	25.5	27.0	2.0	5.9
Germany	TCE	24.2	26.9	-2.7	10.9
Malaysia	TF	23.6	24.6	7.2	3.9
Mexico	TF	21.5	22.4	-5.2	4.4

“ For 2012, worldwide international tourist arrivals are expected to grow in the range of +3% to +4% ”

have been sluggish and plagued by uncertainty. Yet, a series of negative shocks, of which the earthquake and tsunami in the T hoku region of Japan and the revolutions and protests in various countries of North Africa and the Middle East were by far the most important, had a greater impact on emerging economy destinations than on advanced economies.

At the time of writing (December 2011) UNWTO expects tourism to have increased by around 4-5% globally during 2011. Many destinations in Europe have benefitted from the unrest in the Middle East and North Africa and there has been a lot of impressive growth in the emerging economies (China +30%, Russia +21%, Brazil +44%, India +33%).

2012 at a glance

UNWTO's initial forecast for the coming year points to a growth below the 4% long-term average. For 2012, worldwide international tourist arrivals are expected to grow in the range of +3% to +4%, slightly lower than in 2011, but sustaining the positive results of 2010 (+7%) and 2011. In this case, the number of international tourist arrivals will break the 1 billion mark in 2012. This outlook reflects the complicated economic conditions seen in major advanced economies. The stalled economic recovery and increased financial and fiscal challenges have brought growing uncertainty to the tourism market. On the other hand, North Africa and



The UNWTO World Tourism Barometer offers a unique overview of short term international tourism trends. It is developed by UNWTO with the aim to provide all those directly or indirectly involved in tourism with adequate up-to-date statistics and analysis in a timely fashion. It is updated three times per year and is available in English, French and Spanish in print and PDF version.

For more information visit: www.e-unwto.org



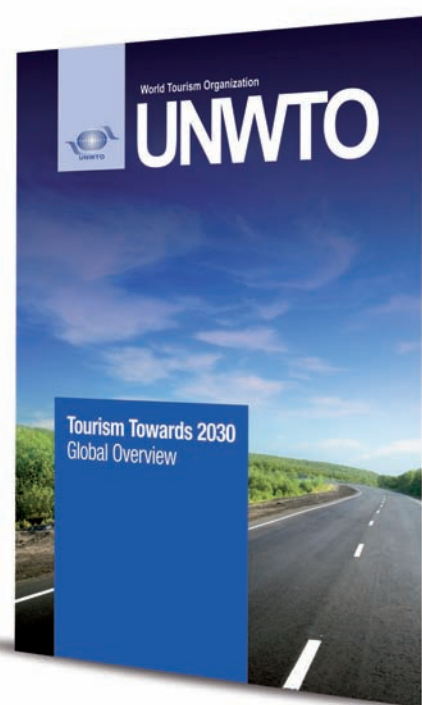
the Middle East should start to show signs of recovery from the depressed 2011 results. However, the political situation has to settle down first and a full recovery in tourism might be more difficult and slower than hoped for.

Nevertheless, the current results reflect the strong resilience of tourism demand, substantiating our forecast that international tourism will continue to grow in 2012, albeit at a slower pace, creating much needed exports and jobs in many economies around the world.

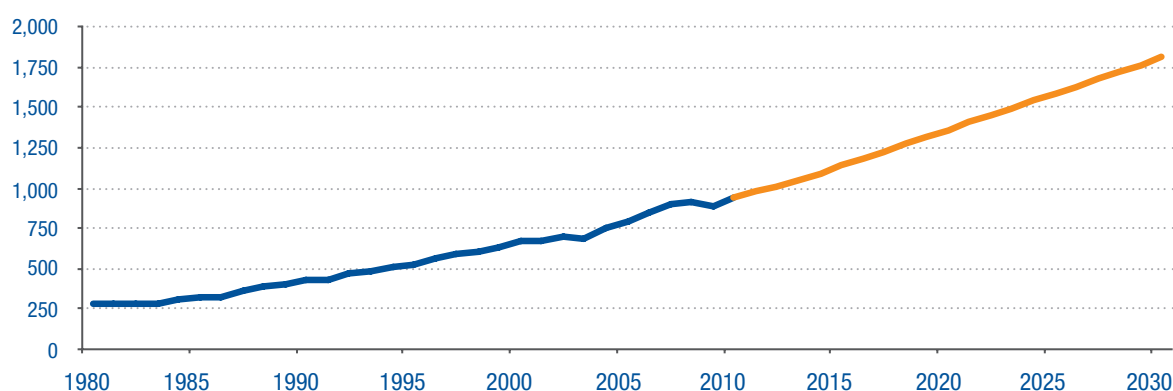
Look out for the next issue of the UNWTO World Tourism Barometer, scheduled for the second part of January 2011.

Looking ahead: Tourism Towards 2030

International tourist arrivals are expected to increase by an average 43 million a year over the next two decades, reaching 1.8 billion by 2030, according to the UNWTO report *Tourism Towards 2030*. The report finds that the number of international tourist arrivals worldwide will increase by an average 3.3% a year over the period 2010-2030. This growth is slightly more moderate than the average 3.9% a year between 1995-2010, given that it is based on much higher volumes and that the next decades are expected to see slower GDP growth, as well as a move towards slightly higher air transport costs.



International tourism, World International Tourist Arrivals, million



Source: World Tourism Organization (UNWTO) ©

UNWTO's long term forecast 'Tourism Towards 2030' was launched at the UNWTO General Assembly in the Republic of Korea in October 2011. To read more, you can subscribe to the UNWTO e-Library (www.e-unwto.org) or purchase a printed version at (www.unwto.org/infoshop).

The data in this section was kindly provided by the UNWTO Tourism Trends and Marketing Strategies Programme.



The economics of LGBT tourism



As the global visibility of the lesbian, gay, bisexual and transgender (LGBT) community increases, the discussion of the market's economic impact continues to gain traction. Perhaps nowhere is this more evident than in the travel industry.

News articles are quick to embrace the idea of the “pink dollar,” promoting the idea of LGBT travellers as a commodity with a high disposable income. This is reflected in the much-banded-about acronym DINK – dual income, no kids – which paints same-sex couples as the optimal consumers and often highlights gay men as bigger spenders than their lesbian counterparts.

In reality, the LGBT economic data to support this colorful commentary exists in small quantities, gathered by independent marketing firms and a handful of destinations. While there is vital knowledge to be gained from this information, it should always be viewed as a kind of compass that points to directions in the marketplace rather than a comprehensive assessment of

a community. LGBT people cannot be reduced to a stereotype.

Much of the most far-reaching LGBT travel data collected to date comes from members of the International Gay & Lesbian Travel Association. (See also p.14 for an LGBT travel trend analysis by Bob Witeck). In December 2011, San Francisco-based firm Community Marketing Inc.* released its 16th Annual Gay & Lesbian Tourism Report. The report analyzes poll responses from 6,648 respondents in the US who self-identify as LGBT and who frequent gay websites, publications and events.

Notably, they found an overall increase in LGBT travel after two years of recession-induced decreases, with gay/bisexual men taking an average of 3.9 trips and lesbian/bisexual women taking an

average of 3.3 trips in the last 12 months. The largest segment of respondents fell in the mid-range price point for travel, followed by economy/budget and then luxury; however, the majority of replies in the economy/budget category (61.6% gay men/bisexual; 57% lesbians/bisexual women) indicated that this decision was based on the desire to take more trips rather than out of financial restrictions.

CMI President Thomas Roth is careful in placing a value on the U.S. LGBT market as a whole, given the variables involved. “There is no way to accurately enumerate LGBT economic impact,” he says. “Our methodology is to take 5 percent of the whole U.S. tourism industry. According to the U.S. Department of Commerce, the travel and tourism industry generated more than \$1.3 trillion in economic output



in 2010. Based on this data and CMI sample demographics, we estimate that the annual economic impact of LGBT travelers is over \$65 billion per year in the U.S. alone.”

Netherlands-based Out Now Consulting makes wider projections on the global LGBT tourism market, placing its potential at nearly \$165 billion for leisure travel spending in 2012. This figure is based upon the company's ongoing Out Now Global LGBT2020 Study**, which asks survey respondents about expenditure in the previous 12 months in global markets with the population and LGBT marketing infrastructure to mount effective potential LGBT tourism marketing campaigns. The total sample size exceeds 40,000 survey respondents from 25 countries: Argentina, Australia, Austria, Brazil, Canada, Chile, Ecuador, France, Germany, India, Ireland, Israel, Italy, Japan, Mexico, Netherlands, Peru, Poland, Portugal, South Africa, Spain, Turkey, UK, the U.S., and Uruguay.

While most data on the market is branded as LGBT, the majority is based on responses from gay men. To address the lack of understanding of lesbian travel habits, Curve, the largest lesbian magazine in North America, conducted a 2011 travel survey among its readers, drawing nearly 1,000 responses (comparable to the number of women included in CMI's report). Early findings indicated that 29 percent of respondents spend more than \$2000 on their annual vacation, with an additional 33 percent spending more than \$1000.

“Until recently, the lesbian market has not

been on the radar,” said Merryn Johns, Curve Editor in Chief. “There is a variety of reasons for this: lesbians tend to be low maintenance travelers, more likely to be interested in adventure than services; lesbian travelers are often invisible—two women traveling together or with children tend to be read as heterosexual; additionally, stereotypes of lesbians as low-budget and frugal travelers often relegate them to an inferior more lucrative gay male segment. This contributes to poor lesbian visibility and an assumption that the lesbian market is non-existent. In fact, studies show that lesbians are frequent travelers, they earn more than heterosexual women, and they spend nearly as much as gay men when they travel.”

Additional opportunities for economic growth exist within subsets of the overall LGBT travel sector. At the top of this list is the blossoming wedding market as more states and countries legalize same-sex unions. The Independent Democratic Conference of the New York State Senate released a look at the economic impact of marriage equality on New York State in May 2011. The report projected that recognizing gay marriage would create more than \$310 million in increased revenue and economic activity for the state during the next three years. U.S. Census Bureau data from New York residents and out of state same-sex residents was used in addition to a previous study carried out by the Office of the New York City Comptroller in 2007 and those conducted by the Williams Institute of the UCLA School of Law.

Over the past two years, Sao Paulo

Turismo has sponsored research on the impact of the city's LGBT Pride event – with an estimated 4 million participants, it's considered the largest gay event of its kind in the world. Based on a 2011 survey of 1,664 attendees that examined spending habits and length of visit, the event is estimated to pump BRL 206 million reais into the local economy; this figure is up from BRL 188 million reais in 2010.

These are merely snapshots of a global market segment, not intended to summarize the diversity of LGBT people worldwide. However, there's no denying that LGBT travellers are a dynamic and influential segment within the tourism sector – one whose willingness to come out and be counted will continue to grow as society becomes more accepting and more human rights laws that promote equality are passed. Reaching out to LGBT travelers in an informed, authentic manner is essential.

We look forward to more government research and even larger sample sizes in the future. A greater understanding of the spending habits and interests of the LGBT market can only benefit any tourism business interested in providing the most positive, welcoming experience to all visitors.

“ Reaching out to LGBT travelers in an informed, authentic manner is essential. ”



www.iglta.org

Sources in order of appearance:

*Community Marketing Inc
www.communitymarketinginc.com

**Out Now Global LGBT2020
<http://www.outnowconsulting.com>

All figures in this report are U.S. dollars (USD) unless otherwise stated.



The social impact of LGBT tourism

Why welcoming LGBT travellers is not just good for business



Peter Jordan,
External Partnerships,
UNWTO Affiliate
Members

“All businesses and destinations seeking to attract LGBT customers have a duty to recognise the link between social acceptance of homosexuality, government legislation and the effects of these on their business.”



As anyone who works in consumer research on the preferences of lesbian, gay, bisexual and transgender people will testify, a common mistake made by those new to this area is to make basic assumptions about LGBT consumers' interests, family status and disposable income. Of course, gay peoples' lives are not simply defined by their sexuality but rather their social class, gender, race, age and ability too; all variables which influence consumer decisions and which in any case will be influenced by the socio-political environment in which they live. Nonetheless, gay consumers have been identified as a meaningful market segment and this has become especially evident in the world of travel and tourism.

Today's established gay city destinations can all trace their origins in gay tourism to the solidarity against the HIV/AIDS epidemic of the 1980s and the desire of gay men and women to come forward to combat prejudice and misunderstanding about the community*. Businesses serving this increasingly visible segment started to understand that by providing goods and services without prejudice, customers would reciprocate with their trust and loyalty. This same principle is true of any minority group, not just the LGBT community. Article 2.1 of the UNWTO Global Code of Ethics for Tourism states that:

“Tourism...should be planned and practised as a privileged means of individual and collective fulfilment; when practised with a sufficiently open mind, it is an irreplaceable factor of self-education, mutual tolerance and for learning about the legitimate differences between peoples, cultures

and their diversity”

While the Global Code of Ethics for Tourism does not, to date, mention discrimination on the basis of sexuality in its call for fundamental human rights to be accorded to tourists, this should surely be a cause for reflection by destinations worldwide, in light of the recent advances made by the United Nations in this area (see declaration by UN Secretary General, Ban Ki-moon p.12). As the article from the ILGA points out (p.13), despite the continued persecution of LGBT people around the world, there has been a general trend towards de-criminalization and the approval of legislation to protect their rights. This has extended into several key areas including protection against attacks, equality in the workplace, military service and childcare and finally, official recognition of same-sex couples through marriage or civil partnerships. It is this final area of legislation which has had the most visible and positive consequences for the tourism sector.

The granting of marriage rights for same-sex couples has produced a whole new market segment and providers in both source countries and destinations have been keen to develop new products and services to respond to this. It has been observed that when marriage rights are approved, many of the first couples to 'tie the knot' are older, consolidated couples who will have different leisure interests to younger, single travellers (until now, arguably the most visible segment in LGBT travel marketing). Similar opportunities are arising to attract gay couples who are increasingly travelling with their own, legally-adopted children.



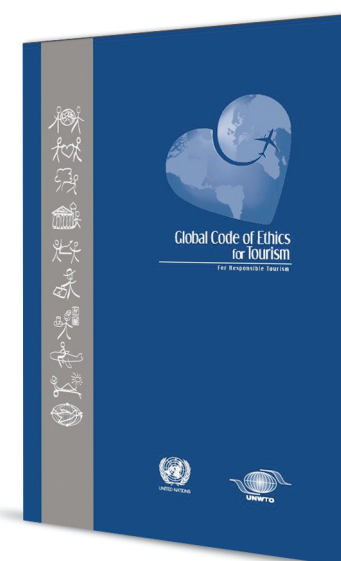
Beyond the economic benefits, the approval of legislation in favour of equality for same-sex couples sends a powerful brand image of tolerance, respect, progress and open-mindedness, resulting in an increase in LGBT visitors, among others. The experience of Argentina and Spain demonstrates this clearly.

Besides the basic ethical importance of welcoming LGBT travellers, it has been observed that many consumers in this group are highly receptive to products and services that are socially and environmentally responsible or are intended to 'give something back' to the host community. For a group which has suffered and continues to suffer repression in many parts of the world, the element of social solidarity is important at the time of choosing tourism destinations and products and many Members of IGLTA can surely attest to this. As emerging markets of LGBT travellers grow, the challenge will be to tap into this solidarity so that travellers may reduce the negative impacts and increase the positive impacts of their travel on the host society and environment, an approach that the UNWTO strongly advocates.

In the future, as equality for LGBT people spreads around the world and normalization prevails, it will be interesting to see how LGBT travel develops on a global level. It is likely

that destinations that have a long-established reputation for tolerance and a large resident LGBT community will continue to attract LGBT visitors from around the world. The testimonies from the cities and countries that participated in this report show us that new destinations are starting to compete with these established names in greater numbers than ever before which is surely good for global travel as a whole.

To conclude, challenging assumptions and learning about the diversity of LGBT travellers is vital if businesses want to build strong customer relationships and the first step to doing this is to learn about the market. Furthermore, all businesses and destinations seeking to attract LGBT customers have a duty to recognise the link between social acceptance of homosexuality, government legislation and the effects of these on their business. While it is true to say that not all gay travellers will consume 'gay' products or services, no gay traveller wishes to be excluded from any of these, nor should they be. By joining promotion efforts, sharing information about visitor profiles and training staff to a high level, tourism stakeholders can take to ensure that their LGBT visitors have positive travel experiences and will continue to visit long into the future.



“Tourism...should be planned and practised as a privileged means of individual and collective fulfilment; when practised with a sufficiently open mind, it is an irreplaceable factor of self-education, mutual tolerance and for learning about the legitimate differences between peoples, cultures and their diversity”

Article 2.1 UNWTO Global Code Ethics of Tourism

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LGBT rights and the United Nations

In December 2008, one-third of the United Nation's 192 Member States (now 193) submitted a non-binding declaration to the UN General Assembly calling for States to take "all necessary measures, in particular legislative or administrative, to ensure that sexual orientation or gender identity may under no circumstances be the basis for criminal penalties, in particular executions, arrests or detention". The appeal is based on the Universal Declaration of Human Rights which states in Article One that "All human beings are born free and equal in dignity and rights".

Statement by the UN Secretary General Ban Ki-moon on the occasion of World Human Rights Day, 10 December 2010

"We know how controversial the issues surrounding sexual orientation can be. In the search for solutions, we recognize that there can be very different perspectives. And yet, on one point we all agree - the sanctity of human rights.

As men and women of conscience, we reject discrimination in general, and in particular discrimination based on sexual orientation and gender identity. When individuals are attacked, abused or imprisoned because of their sexual orientation, we must speak out. We cannot stand by. We cannot be silent. This is all the more true in cases of violence. These are not merely assaults on individuals. They are attacks on all of us. They devastate families. They pit one group against another, dividing larger society. And when the perpetrators of violence escape without penalty, they make a mockery of the universal values we hold dear.

We have a collective responsibility to stand against discrimination, to defend our fellow human beings and our fundamental principles. Liberal democracy has spread in many parts of the world in recent decades. In general, more and more of us have learned to cherish our diversity. Today, many nations have modern constitutions that guarantee essential

rights and liberties. And yet, homosexuality is considered a crime in more than 70 countries. This is not right.

Yes, we recognize that social attitudes run deep. Yes, social change often comes only with time. Yet, let there be no confusion: Where there is tension between cultural attitudes and universal human rights, universal human rights must carry the day. Personal disapproval, even society's disapproval, is no excuse to arrest, detain, imprison, harass or torture anyone - ever.

From my first days in office as Secretary-General, I have spoken out against stigma and discrimination. I have worked, with some success, to persuade governments to lift travel restrictions on people with HIV. During my recent trips to Africa, I urged leaders to do away with laws criminalizing homosexuality. (...)

I take pains to find the right balance between public and private diplomacy to reach difficult solutions. I will continue to do so. I will continue to speak out, at every opportunity, wherever I go. And I will do so because this is the right thing to do. Because this cause is just.

That is why this day, this very special day, means so much to me. Human Rights Day commemorates the Universal Declaration of Human Rights. It is not called the partial declaration of human rights. It is not the sometimes declaration of human rights. It is the universal Declaration, guaranteeing

all human beings their basic human rights, without exception.

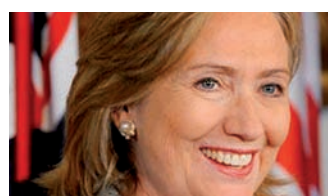
Violence will end only when we confront prejudice. Stigma and discrimination will end only when we agree to speak out. That requires all of us to do our part. To speak out - at home, at work, in our schools and communities. To stand in solidarity. Your discussions today are part of that larger campaign, yours and mine.

Together, we seek the repeal of laws that criminalize homosexuality, that permit discrimination on the basis of sexual orientation or gender identity, that encourage violence.

People were not put on this planet to live in fear of their fellow human beings. The watchwords of civilization have always been tolerance, understanding and mutual respect. That is why we are here today. And that is why we ask the nations and the peoples of the world to join us. To join us in common cause in the name of justice and a better life for all".



Ban Ki-moon
UN Secretary General



“ Like being a woman, like being a racial, religious, tribal or ethnic minority, being LGBT does not make you less human. That is why gay rights are human rights and human rights are gay rights. ”

US Secretary of State Hillary Rodham Clinton, 6.12.11, Palais des Nations, Geneva, Switzerland



Recent advances in LGBT rights

By Gloria Careaga and Renato Sabbadini, co-Secretary-Generals of ILGA



Whereas at the turn of the millennia LGBTI rights were still an anathema for many in the countries of the Global North and either a taboo or a non-topic in the Global South, we have seen significant progress in the South as well as in Eastern Europe in the first decade of the 21st century. Apart from the advances in Europe and Canada, there was the opening up of same-sex marriage in South Africa in 2006, in Argentina in 2010, in Mexico City in 2009 and the State of New York in 2011.

Though marriage rights are an important indicator of LGBTI progress, and can create more options for international LGBTI marriage tourism, the whole picture is much more complex, as shown by the urgent need for a universal decriminalization of homosexuality. Though some progress was made in some southern countries in the first half of the last decade, things appeared to stall afterwards, especially in Africa and the Caribbean. The Universal Periodic Review of the Human Rights record of member countries by the United Nations has proven to be, however, a useful tool to raise awareness among countries as to the need to move

towards decriminalization of sexual and gender diversity.

That said, this still leaves 76 countries in 2011 where homosexuality is illegal, five of which making it punishable by death. And there are initiatives to increase even further the punishments for same-sex sexual activities among consenting adults in the parliaments of Uganda and Nigeria. At the same time, however, it needs to be said that these developments do go against a more general trend, which in 2011 culminated with the issuing of a Statement signed by 85 countries at the UN Human Rights Council condemning persecution on the basis of sexual

orientation or gender identity. This major statement was supported for the first time by countries from all the regions, including several African and Asian countries, and most Latin American countries.

With a view to global tourism, many countries are beginning to realise that human rights considerations have also a positive effect on their economies and to actively promote LGBTI tourism as a consequence, from Eastern Europe, and the Caribbean, to Nepal high up in the Himalaya Mountains. ILGA praises the UNWTO for its innovation to include a chapter on LGBTI tourism in their report.



ILGA focuses public and government attention on cases of discrimination against LGBTI people by supporting programs and protest actions, asserting diplomatic pressure, providing information and working with international organisations and the international media. ILGA is the world federation of LGBTI organizations and represents more than 800 members from 110 countries.

www.ilga.org



Emerging trends in LGBT tourism

Gay men and lesbians have long traveled the world just like everyone else. It also goes without saying that for earlier decades, they did so at the personal price of remaining nearly invisible and above all, by concealing their sexual orientation and relationships to all but the most trusted friends and contacts.

However, social, cultural and political advances, throughout many diverse cultures on all continents open travel options for many more gay people who no longer choose to conceal their identities as they visit new places, make friends and lasting relationships, and experience new destinations. As exhilarating as the pace of change has been for sexual minorities, it goes without saying that lesbians, gay men, bisexuals and transgender people also remain stigmatized and deeply cautious especially in higher-risk societies in the Middle East and Africa, as well as parts of Asia. Yet, despite these harshly oppressive environments, advances in legislation are creating real opportunities for those countries that are on the cutting edge of acknowledgement, trust, and acceptance.

With marriage equality today a reality in Buenos Aires, Lisbon, Barcelona and Mexico City, for instance, is it any wonder that more gay couples are considering escapes to Spanish and Portuguese-speaking nations in all hemispheres? And despite some cultural frictions about same-sex relations in parts of Asia, the resorts and idyllic getaways in Thailand, Indonesia and the Philippines still beckon to many LGBT people. In India, with the recent lifting of long outdated legal sanctions, the emerging LGBT hospitality space offers exciting new choices for gay globe-trotters too.

In fact, just imagine a world today where a Latin American leader enthusiastically cheers as her nation enacts the continent's first same-sex marriage law (Argentina); where a lesbian proudly serves as the head of government (Iceland); where an openly gay man is elected to the parliament of his small Asian kingdom (Nepal); and an African nation embraces a new constitution that not only dismantles racial apartheid, but extends full civil and marriage rights to same-sex couples (South Africa). These and other societies are the new frontiers for all those who are celebrating, promoting and profiting from LGBT tourism in the 21st century.

Emerging trends in LGBT travel and hospitality

With the swift pace in digital technology and affordable accessibility, sharing information, travel tips and LGBT-specific knowledge can be exchanged in a snap. If the world is truly "shrinking," then lesbians and gay men, bisexuals and transgender (LGBT) people are helping show the way by reshaping and renewing global tourism and hospitality. This has been demonstrated by cutting-edge technology companies that not only welcome contributions from LGBT people, but who, in turn, helped evangelize their economic and social values. They are spearheading the value of lesbian, gay, bisexual and transgender (LGBT) tourism in this generation as never before.

So how do we know that LGBT travelers are on the forefront? Granted, it has never been simple to conduct credible and scientific research about lesbians, gay men, bisexuals and transgender consumers (LGBT), given stigma and legal discrimination, however, there are some valuable North American benchmarks

that marketers and travel leaders find encouraging.

Unsurprisingly in earlier years, pollsters resisted asking any survey questions about sexual orientation since they feared it would yield little or no meaningful data. They believed even asking the question about sexual orientation or same-sex partners would be offensive to some, and risky for others. With trusted online and truly confidential survey technologies, that reticence has flipped – and we are mining far more valuable knowledge about LGBT travel identities, habits, attitudes and preferences.

In spring 2011, with the U.S. and global economy remaining in precarious balance, for example, by working with our global online research partner Harris Interactive (best known for the Harris Poll), we learned that LGBT Americans in particular showed increasing interest and intention to travel. This past summer, in fact, we saw an uptick among two thirds of LGBT adults who reported their leisure travel plans this summer.

In addition, when asked, we learned that not only were gay Americans more likely to travel this summer than last, but also that those who traveled planned to spend more money. LGBT adults report on average they intended to spend about \$1,300 between May and August 2011 for their leisure or business travel, while during the same time period last year, the average planned travel expenditure was \$1,058. [Note this survey was conducted among 2,576 U.S. adults over the age of 18 of whom 331 self-identified as LGBT and was conducted between April 11 and 18, 2011, by the global market research firm Harris Interactive and Witeck-Combs Communications.]



In metrics and in anecdotes, we see evidence of optimism and resilience among LGBT travelers – a signal that gives hope to most global markets. In other travel trends, we see a burgeoning interest in destination weddings and honeymoons for same-sex couples in Europe and Latin America (as well as throughout the U.S.). With the rise of parenting too, more lesbian and gay couples are expanding their ambitions to travel with their own children – just as their heterosexual counterparts have always done; they are eager to find welcoming, safe and culturally fair-minded destinations that treat their family equally and respectfully with all others.

Make no mistake. Gay households, like all others, are experiencing real changes and some hardships in their household budgets, plans and travel expectations. These travelers are not wealthier on average than others and LGBT consumers should not be stereotyped primarily as affluent and completely risk-averse. However, experiencing the lessons of the economic

“ Make no mistake. Gay households, like all others, are experiencing real changes and some hardships in their household budgets, plans and travel expectations. ”

downturn has been a wake-up call for all consumers, including LGBT households – who nonetheless continue to show a higher propensity to travel and to dedicate a greater share of their wallet and appetite to their travel habits and needs.

For all travel leaders, the global message is clear: Make your welcome authentic, respectful, diverse and inclusive and your LGBT friends and family members will remain loyal and enthusiastic.



Bob Witeck, CEO Witeck Communications

Bob Witeck is CEO of Washington DC-based Witeck Communications, Inc. (www.witeck.com) the nationally respected strategic counsel and communications firm specializing in strategies for companies wishing to reach lesbian, gay, bisexual and transgender (LGBT) households and consumers. With more than two decades' experience in this unique market, Bob has long been a trusted bridge between corporate America and lesbian, gay, bisexual and transgender consumers while also providing strategic counsel to non-profit community leaders that aim to educate the public and to better serve the LGBT community.



Spain: Proud to welcome LGBT visitors from around the world



Antonio Bernabé
Director General Turespaña



“ For decades Spain has been Europe’s leading holiday destination and this continues today, essentially thanks to its excellent climate and the quality of its tourism destinations. ”

At global level, we rank fourth in international arrivals and second in receipts from tourism. The first ten months of the year 2011 have been very positive with around 51 million international visitors arriving in the country, spending an accumulated

€42bn – representing an 8% growth in arrivals and 8.2% increase in receipts compared to 2010.

Nevertheless, in a climate of strong competition and visitors who are increasingly specialized and independent, Turespaña is dedicated to attracting those visitors who are seeking a range of holiday experiences and who have a greater disposable income through its New Marketing Strategy for 2011-2014. This strategy brings together an extremely wide portfolio of market segments and we recognise that the LGBT visitor is increasingly relevant to this portfolio. We now face the challenge of improving our position as a gay-friendly destination in European markets and to

“ It’s clear that strong cooperation between public and private bodies will be the surest path to success in both developing attractive products and promoting them. ”

become well-known by consumers in emerging markets. It’s clear that strong cooperation between public and private bodies will be the surest path to success in both developing attractive products and promoting them.

Of course we mustn’t forget that this



* Where prejudice stays in the closet



particular segment is experiencing considerable growth. From our developed markets, LGBT tourism accounts for around 10% of the total travel market. Although there is no set pattern of behaviour by LGBT consumers (whose preferences are of course as diverse as those of the general population), we do know that they are very loyal to those brands that satisfy their needs and that they generally have a greater buying power, which we estimate in Spain to average approximately 130€ per day.

With this in mind, traditional destinations in Spain are undergoing a major change as Spanish cities and businesses are learning to adapt what they offer to the LGBT segment. Madrid, Barcelona,

San Sebastian and Sitges are good examples of cities which have created their own strategies for product development and promotion to reach out to LGBT visitors. At the same time, a considerable number of Spanish hotel groups, event organizers, travel agents, tour operators and night-time leisure businesses are demonstrating their commitment to LGBT visitors through their membership of IGLTA.

Spain's adaptation to the realities of today's modern society has gone much deeper since the Spanish government's promotion of equal rights for all citizens through the law passed in 2005 which allowed full marriage between persons of the same sex. This law reflects a plural society that aspires to remove

“ Spain today is a country with an open mind and without prejudice ”

all discriminatory barriers and it undoubtedly brought about a positive change in the image of Spain as a LGBT destination. Spain today is a country with an open mind and without prejudice. It tolerant and welcoming to all its visitors and this is why I am convinced that our country will increasingly be considered one of the best options for any LGBT visitor from around the world.



EMBRATUR: Committed to putting Brazil on the map for LGBT visitors



Marco Antonio de Britto Lomanto
Director of Products and Destinations
Dept., EMBRATUR

 **EMBRATUR** Ministry of
Tourism

BRAZILIAN GOVERNMENT
BRASIL





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Despite the world economic crisis, Brazil has grown rapidly and our society has seen many advances in recent times. In 2008 the Brazilian government gathered 17 ministries to organize the 1st National LGBT Rights Conference. It was a huge success and the achievements have shown that when such initiatives are organized and focused, we can be very effective in overcoming the barriers of prejudice and discrimination. In May 2011 one more important victory made the LGBT community very proud: the recognition by the Supreme Court of the Civil Union for LGBT couples. This was the results of a strong partnership between the LGBT community and the National Congress, showing a national desire for cohesive and mature respect for personal rights and diversity.

In 2009, facing the need to strengthen Brazilian tourism, the Ministry of Tourism and EMBRATUR proposed a partnership with the Brazilian

Association for Gay and Lesbian Tourism (ABRAT GLS), focused on the development of a promotional work for the segment. Since then, Brazil LGBT Tourism promotion has been present in many different countries and has participated in fairs and events of great importance for tourism, attracting the attention of LGBT communities all over the world. Many Brazilian destinations joined this common effort, preparing better services and routes for LGBT visitors. The most important aspect of this initiative has been the awarding of the 29th IGLTA Annual Global Convention to Florianopolis; the first edition in South America.

The EMBRATUR Promotional Plan for the next three years initiates a period of great visibility for our country. This Plan will focus on the two mega events: the 2014 World Cup and the 2016 Olympic Games. Our plan proposes to expand Brazilian presence in the world's major tourism

fairs, with dedicated spaces for the LGBT sector in order to serve professionals and the public with information about Brazilian LGBT destinations.

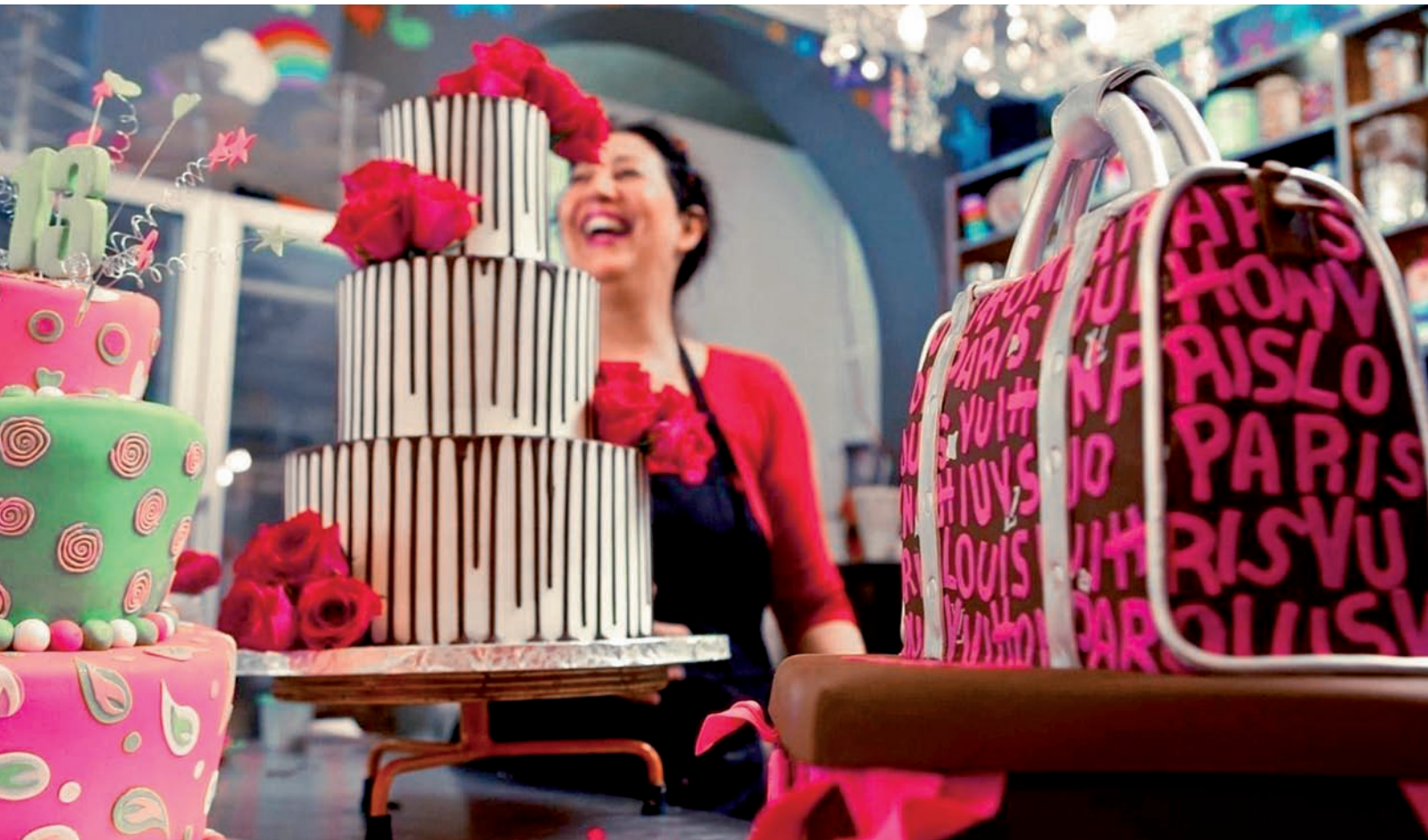
Some surveys and studies that have been carried out in recent years have shown surprising results. São Paulo LGBT Pride Parade gathered over 4 million people including 650,000 tourists and 15,000 of these coming from overseas. During that week, São Paulo had an average increase in revenues between 20-25% and 30% over hired services for the event*. Furthermore, a survey conducted by a LGBT consulting company in Brazil showed that our country has over 9 million potential LGBT consumers**. This data confirms that Brazil is ready to negotiate with the international market and reap good results. In the years to come, we look forward to achieving better results than ever before in this relevant segment of world tourism.

*Source: São Paulo Tourism Observatory

**Source: Out Now Global



Out in South Africa



“ South Africa is also growing in global stature as a leader in same-sex weddings and honeymoon packages. ”



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“ South Africa is a liberal country with a progressive constitution, where LGBT travellers are more than welcome. ”

South Africa is a liberal country with a progressive constitution, where LGBT travellers are more than welcome. There are a number of tour operators and events available to fulfil the growing demand for bespoke itineraries for the LGBT traveller, whether adventure-seeking, luxury romance or up-close-and-personal safari experiences are the order of the day. Many of the tour operators are affiliated to IGLTA (International Gay and Lesbian Travel Association).

The LGBT market is a burgeoning one for the South African tourism industry, given the LGBT consumer's general higher disposable income and frequent travel patterns. The market truly opened up post 1996, when extensive changes were adopted into the South African constitution, offering protection from discrimination on the grounds of race, gender or sexual orientation. South Africa's pioneering move as the first country in Africa (and 5th in the world) to legalise same-sex unions echoes our commitment to offering equal rights to any visitor to our country, without bias towards sexual-orientation.

While there is still much work to be done in terms of researching the market to identify exactly what it is about South Africa that draws many LGBT travellers each year, there is undoubtedly a growing demand for our unique combination of experiences and breathtaking scenery. Information supplied by a number of exclusively-gay guest houses suggest the largest number of travellers come from Britain, the Netherlands, Germany and the United States, with a large domestic contingency taking advantage of off-season rates. Feedback from LGBT travellers to South Africa cite the country's rapid urban development without losing its authentic 'African-ness' as a major attraction. Visitors also regularly make reference to our colourful people, history and cultural influences, which add an unexpected texture to our lifestyle offering to the global traveller.

“ Feedback from LGBT travellers to South Africa cite the country's rapid urban development without losing its authentic 'African-ness' as a major attraction. ”

Cape Town – dubbed the 'Gay capital of Africa' – is a favoured destination, with its proximity to the wine land region, iconic tourist attractions, vibrant nightlife and a thriving gay scene. The growth in popularity of the city has spurred exclusively gay guesthouses, bars, restaurants and even beaches. This trend is extending to other cities in the country, with Johannesburg preparing itself for a steady stream of LGBT travellers who seek cosmopolitan city experiences within driving distance of the country's best wildlife and adventure offerings. South Africa is also growing in global stature as a leader in same-sex weddings and honeymoon packages.

South Africa celebrates its liberal and welcoming outlook at numerous events held throughout the year. Such events include:

- Gay Pride Cape Town, Johannesburg, Nelson Mandela Bay, Soweto and Ekurhuleni
- Pink Loeries Mardi Gras
- Out in Africa Film Festival
- MCQP (Mother City Queer Costume Party) Event
- Mr Gay South Africa

Since word-of-mouth marketing the most powerful tool for increasing a destination's favourability to the LGBT traveler, South Africa is well positioned to continue growing this valuable market. With its welcoming attitude, world-class capability and an unrivalled diverse offering of experiences, South Africa will continue enticing LGBT travellers with a view to making the country a 'must-see' destination on their annual travel wish list.

www.southafrica.net

South African Tourism is the national tourism agency responsible for the marketing of South Africa as a preferred tourist destination.



A sense of community for the LGBT traveller in Cape Town

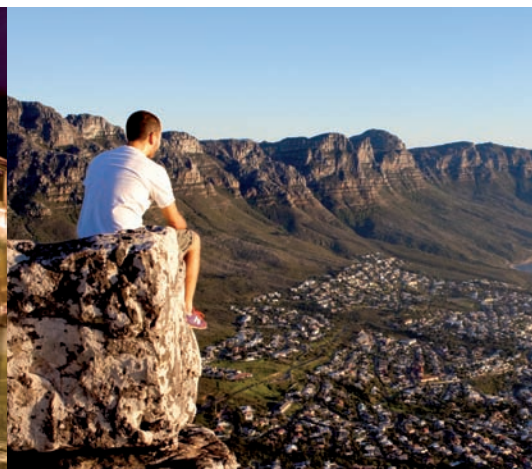


**CAPE TOWN
TOURISM**



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Cape Town Tourism is the City of Cape Town's Official Regional Tourism Organization, responsible for destination marketing, visitor and industry services. Our vision is to position Cape Town as one of the world's top destinations in which to live, work, study, visit and invest in.

Cape Town is a premier destination for the LGBT traveller due to its reputation as a capital with a cosmopolitan lifestyle a gay-welcoming city that celebrates and embraces diversity in all its aspects. As a country, South Africa boasts one of the most progressive Constitutions, protecting gay rights and sanctioning gay marriage.

We estimate that approximately 10-12% of tourists to Cape Town are from the LGBT market. Most of Cape Town's gay visitors are from Europe (Germany, The Netherlands, and France), the United Kingdom and the United States of America. The high appeal and strong positioning that Cape Town enjoys in the LGBT market is strengthened by the presence of the local gay community in Cape Town with many tourism related and

other businesses gay-owned or gay-run. Cape Town Tourism offers travel advice to LGBT visitors through www.capetown.travel, which cites gay-friendly accommodation and tours, and through distribution of the Cape Town Gay Guide, a Pink Map, and a monthly newspaper called the Pink Tongue that lists hot and happening events. Furthermore, a chapter of our 2012 Official Visitors Guide will be dedicated to LGBT travellers, along with chapters targeting other niche markets such as sport enthusiasts, golf tourists, adventure tours etc. The aim here is to share the corners of Cape Town where LGBT travellers feel most at home, with the greatest sense of community; whether it is the night spots in Green Point, the best coffee spots in "The Village" or the best times of the day to visit Clifton's famous Third Beach.

There are a number of celebrations on the annual calendar that cater to the gay community such as The Mother City Queer Project, that attracts more than 6,000 gay and heterosexual revelers each year, the Cape Town Pride Festival that comprises a number of events culminating in the Pride Parade and fete with restaurants

and bars hosting fringe events and The Out in Africa: South African Gay & Lesbian Film Festival screened across the city.

Cape Town walked away with Tripadvisor's Traveller's Choice Award in 2010 for the very same reasons that the city was recognised by The Guardian as 'one of the

“ We estimate that approximately 10-12% of tourists to Cape Town are from the LGBT market. ”

10 most popular gay travel destinations in the world' and US publication Out and About cited it as a 'world-wide favourite'. Cape Town is city of natural beauty, hope, creative freedom and incredible spirit; one committed to first being a great place to live in order to be a great place to visit.

www.capetown.travel



Argentina's approach to the LGBT market





The characteristics of LGBT consumers make them highly attractive to the local economies of our country. For this reason, LGBT tourism products have been made a priority among the five axes of our 'Authentic Argentina' tourism strategy.

With the aim of strengthening policies to promote Argentina as "gay welcoming destination" and promote tourism in this segment, the National Institute of Tourism (INPROTUR) signed a technical cooperation agreement with the Chamber of Gay Lesbian Argentina Trade (CCGLAR) in March 2011. This agreement followed a state policy promoted by the president, Cristina Fernandez de Kirchner, seeking to facilitate conditions for the tourism sector in Argentina:

Its main objectives are to:

- Increase the number of LGBT tourists to Argentina;
- Position Argentina as the best destination for LGBT tourism in Latin America;

- Highlight the innovative features of Argentina as a country that officially promotes itself as a friendly destination with the LGBT community.

Studies conducted in our country and the region show that the LGBT consumers are not the same, because within this segment we can identify different profiles that determine specific motivations for travel that help us to establish appropriate strategies according to market segmentation, origin, gender, age, tastes, cultures, professions, etc...

Our wide-ranging research has shown that Buenos Aires is the first or second place in the preferences of gays and lesbians when deciding on their holiday in Latin America. (This figure excludes those consumers surveyed in Argentina itself). The country has other attractions for LGBT tourists: Bariloche, Mendoza, El Calafate, Mar del Plata, Iguazu, Salta Ushuaia all maintain relevant positions in Latin American LGBT traveler preferences.

In a survey carried out among nine countries in Latin America, we also detected that Argentina was perceived to have the lowest perceived rate of homophobia in society in the whole region, surely a product of the laws which have been passed in recent times. Argentina's policies and strategies in promoting LGBT tourism are part of a much wider objective to promote ethnic, religious and sexual diversity and to wipe out discrimination.

On 15 July 2010 Law 26.618 on 'Equal rights in matrimony between persons of the same sex'. The approval of this law, driven by the national government builds on the recent major changes in Argentinian society and demonstrates that Argentina is today an inclusive, ethical, open and tolerant destination for its visitors as well as its residents.

www.argentina.travel

www.ccglar.org



South Korea: a friendly destination for LGBT travellers



Ryan Choi
IGLTA Ambassador to South Korea



“Korea, Be Inspired” is a current promotion line from the Korea Tourism Organization, but it could also apply to the emerging LGBT community and changing attitudes in this often undiscovered gem for LGBT travelers.

The modern day South Korean LGBT Civil Rights movement began in the 90s and continued to expand throughout the first decade of the 21st Century. During that time many national level LGBT civil rights groups organized an annual Pride Festival and LGBT film festival were established, several high profile LGBT entertainers came out, and LGBT characters began appearing in popular movies and television

programs. Like other LGBT civil rights movements around the world, these events didn't come without complications and resistance from society, but with each passing year attitudes are changing and the civil rights movement continues the hard work ahead. While conservative attitudes and familial and cultural norms continue to present challenges for LGBT South Koreans coming out to family (especially parents), many younger LGBT South Koreans are increasingly coming out to their friends and siblings. Meanwhile, even though challenges still exist for LGBT South Koreans to come out publicly, the country predominately remains friendly and a safe destination for LGBT foreign travelers.

South Korea is a land of lush mountains, scenic coastlines, and bustling metropolitan cities where history, culture, and nightlife of interest to LGBT travelers abound. There are several unique neighborhoods in the Capital city of Seoul that have hotels, bars, clubs, cafes, and jim jil bangs (Korean traditional saunas) that are LGBT friendly. These neighborhoods include Seoul's historic Jongno, Shinchon (the university district), or

the foreign enclave Itaewon. Busan and other large metropolitan cities also have LGBT nightlife. Many boutique hotels as well as major hotel chains such as W Hotels are LGBT friendly and provide an excellent range of accommodations in neighborhoods all over Seoul and the rest of South Korea to fit any budget from economy to luxury.

No matter what your interest from market bargain shopping, high end fashion, electronics, art, theatre, all season outdoor activities, dining out, museums, palaces, temples, and much more, South Korea awaits discovery. It is a welcoming destination for LGBT travelers who will leave with a renewed appreciation for the hidden treasures in South Korea, and as good-will LGBT ambassadors leave a positive impression on South Korea to inspire change. When visiting Korea, all will ‘Be Inspired.’

www.kimchitravel.net





India welcomes LGBT visitors with open arms



By Abhinav Goel
India Ambassador to IGLTA

Out Journeys
Come Out in India

India has long enjoyed a unique non-judgemental culture where men feel comfortable walking hand-in-hand down the street, and even sharing the same bed while traveling, without raising an eyebrow. But under antiquated morals imposed under colonial rule, India's LGBT communities had remained deeply closeted. Fortunately for 17% of the world's LGBT community, that is changing, and rapidly. In 2009, the "Section 377" law banning same-gender relations was ruled unconstitutional by the Supreme Court, and a refreshing wave of emergence, identity and community pride is sweeping across the country.

Now is the perfect time plan a trip to India; a rare opportunity to experience this historic birth and transformation among the LGBT community. And, of course, to explore the treasures that are unique to India: Her dazzling festivals, spiritual heart, fascinating craft bazaars, dynamic and living history, cultural and ethnic diversity, and spectacular natural landscapes and wildlife.

Out Journeys (www.OutJourneys.com), an LGBT-dedicated tour operator based in New Delhi with over three years of group and independent tour design experience, has launched a global campaign to raise awareness of India as

an LGBT-welcoming destination.

We started Out Journeys not simply as a business venture. We are doing this because we want to share the dynamic, exciting LGBT-welcoming perspective of India with the world. The Out Journeys team prides itself in having a keen eye for unusual experiences, such as a romantic full moon evening at the Taj Mahal. Additionally, we're partnering with LGBT events such as Pride and Film Festivals to bring unique community-based connections. We send our guests home with a lifetime of warm memories of our country and our genuinely friendly people.

Recent research among 3,865 American LGBT consumers conducted by Community Marketing, Inc. (CMI) demonstrated the pent-up LGBT travel demand for visiting India:

- When past LGBT visitors to India were asked if they would return, over 80% indicated, "yes."
- Culture, history, temples/religion/spirituality and cuisine are the top activities and interests
- 35% of past LGBT visitors to India had been there multiple times.

According to research that we have commissioned, India is the #1 desired destination from this list among lesbians surveyed and Out Journeys is reaching out to the global LGBT community to meet this demand.

www.outjourneys.com

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Madrid: diversity in the streets



“ Spain is one of the world's leading LGBT destinations and Madrid is definitely one of the country's most consolidated destinations given its open and integrated character as well as its vitality, hospitality, tolerance and diversity. ”



iMADRID!



The famous district of Chueca has certainly become a world reference for the peaceful coexistence of its residents, especially among the LGBT community who have found Madrid to be a place to live in peace and freedom.

During LGBT Pride Week, Madrid is famous for its open air concerts, parties, art, culture and sports, not forgetting, of course Madrid's unequalled gay scene which other cities around the world use as a reference. The city boasts around 500 businesses orientated towards the LGBT population (bars, cafes, restaurants, clubs, bookshops, travel agents, gyms, hotels, shops...) as well as many other 'gay friendly' businesses which dedicate their business to the LGBT consumer.

In the year 2007, Madrid held Europride (the official European-level Pride event),

according to the Chairman of the European Pride Organizers Association "the best Europride in history". From then on, Madrid Pride has gained increasing prestige and relevance on the world stage and in recent years, the Pride celebrations have brought together more than two million participants. As a result of this, Madrid won the prize for the 'World's Best Gay Event' for the second consecutive year in the Tripout Gay Travel Awards, supported by MTV.

With these references to back it up, it was only logical that Madrid should put forward a candidature for various events that are well known to this segment, for example the location of WorldPride in 2017 (Official Global Pride event), and in 2014 the host city for the 31st IGLTA Global Convention, a candidature that Madrid is proud to have won.

When making their decision, we're sure that IGLTA took into account the range of attractions that Madrid boasts all year round: the culture, art, entertainment, shopping, gastronomy and nightlife that make Madrid unique.

We're proud that the World Tourism Organization and IGLTA will present this Global Report on LGBT Tourism in FITUR 2012, in Madrid - a city which has so much to offer LGBT visitors. This initiative, as well as the FITUR-LGBT corner is strongly supported by Madrid City Council and we look forward to extending a warm welcome to LGBT visitors long into the future.

www.esmadrid.com/gayandlesbian





Tourisme Montréal and the LGBT Market

“ When Montréal started marketing to the LGBT community, it was one of the very first tourism boards in the world to do so. ”





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In 1994 the Honorable Charles Lapointe, P.C., President & CEO of Tourisme Montréal, decided it was time for the city to market to LGBT travelers. It was a bold approach for that era, but an appropriate one. Montréal had already long attracted LGBT visitors, and by actively reaching out to the market, we were building on a naturally created reputation.

It was in Montréal in 1869 that Moïse Tellier opened his “apple and cake shop,” the first recorded gay establishment in North America. LGBT life continued strong in Montréal throughout prohibition and both World Wars, and gay and lesbian bars flourished through the 1960s and 70s. In 1977, an amendment to the Quebec Charter of Rights and Freedoms prohibited discrimination based on sexual orientation. With that, Quebec became the first jurisdiction in the world larger than a city or county to prohibit sexual orientation discrimination in the private and public sectors.

When Montréal started marketing to

the LGBT community, it was one of the very first tourism boards in the world to do so. In the earliest years, market studies were undertaken, and advertising campaigns were created. But Montréal really showed the value it attached to this market in 1997, when it started including the Gay Village on all of the maps and publications that it printed and distributed to all travelers around the world. The Gay Village became another neighborhood, like downtown or Chinatown.

By 2002, Montréal had already hosted international LGBT events, produced gay city guides, hosted familiarization trips for LGBT travel writers, run LGBT advertising campaigns, launched a specific LGBT section to the Tourisme Montréal website, and even hired someone to specifically oversee the tourism board's LGBT outreach.

As a longstanding leader in marketing to the gay and lesbian community, Tourisme Montréal today finds itself in the unique position of having to stay ahead of the

competition. Maps of the Village aren't enough to stand out anymore, which is why Tourisme Montréal launched its Queer of the Year contest in 2010, inviting queers from around the world to participate in a week-long challenge in Montréal for the crown. This hugely successful campaign, repeated in 2011, garnered hundreds of media articles, won marketing prizes and created an unprecedented social media buzz.

The LGBT niche is a sophisticated and evolving market, and Tourisme Montréal's outreach must evolve with the community. Reaching younger members of the LGBT community, who will become repeat, long-term visitors to our city, is a priority. To do this, we must speak to them in their language and forums, which is why social media and integrating LGBT content into our overall messaging of the destination are a major priority.

www.tourisme-montreal.org



I ♥ New York

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& Company
nycgo.com



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New York City (NYC) has always welcomed people from all backgrounds, cultures, economic status, and beliefs. Home to one of the country's largest LGBT populations, the city has long provided a welcoming message for residents and visitors. One of the earliest domestic partnership laws grew out of the City's history of diversity and tolerance dating back to our founding by Dutch traders more than 400 years ago.

As the birthplace of the modern gay liberation movement, the Stonewall Inn, and the No.1 US LGBT destination, NYC supports and encourages the global LGBT market to visit. NYC & Company, the official marketing, tourism, and partnership organization for NYC, promotes not only visitation during Pride Week in June, but throughout the year at nycgo.com/gay.

In celebration of the 40th anniversary of The Stonewall Rebellion in 2009, a year-long promotion, The Rainbow Pilgrimage,

was created encouraging visits by the LGBT community with special itineraries and hotel promotions as part of it. NYC & Company also produced a documentary film about NYC's LGBT community called *Out in the City*, which premiered on the LOGO television network.

Most recently, with the passage of the Marriage Equality Act in New York state, NYC is reaching out to same-sex couples in NYC and around the world to not only get married in NYC, but to stay for their honeymoon. Over the next three years, NYC is expected to see a \$692M economic impact from same-sex marriages. NYC & Company has branded its marriage initiative for all couples as "NYC I DO". It includes special incentives by its membership (hotels, restaurants, service providers) as well as travel promotions developed through partnerships with American Airlines and Travelocity.

Since 2005, NYC has been tracking

the LGBT community and travel to visit the City. Just as NYC attracts visitors from around the country and the world for business and leisure pursuits, we have provided a welcome destination for millions of LGBT travelers annually. Studies show that LGBT visitors appreciate the gay-friendly environment, the energy and beat of the city, nightlife, arts and culture, and of course, dining out and shopping. On track for later this year, the Out Hotel is bringing a new lifestyle brand to NYC's far west side.

As time passes, we see marketing to the LGBT community becoming more integrated as part of the general market. While many LGBT consumers still want to be acknowledged as a group, there are also many that prefer to be included as part of general messaging vs. being talked to as an isolated group. Finding the right balance will be one of the future trends to be watched.

www.nycgo.com/gay

UNWTO and IGLTA are grateful to NYC and Company for sponsoring the printing of the Global Report on LGBT Travel

Join the RAINBOW PILGRIMAGE™

Plan your NYC journey at nycgo.com/gay

NYC
nycgo.com





Sweet: Do-goodery and debauchery Lesbian travel company fights global warming one vacation at a time

The future of lesbian travel
Sweet

“ In April 2008, Sweet launched with a mission: Make doing good fun. “Often we feel so discouraged by the enormity of a problem that we fail to start,” Shannon Wentworth, Sweet chief executive officer, said. “That’s why, Sweet breaks giant global issues into fun-filled, bite-sized chunks.” ”



Targeting the lesbian community, but open to all, Sweet has taken over 2,200 guests on 13 vacations to six countries by land and by sea. The model is simple: Create fun, 2-4 hour community service projects where travelers can make a big impact in a short time.

For instance, on a recent Mexican Riviera Cruise, 20 Sweeties (as guests are known) painted over graffiti at a school in Cabo San Lucas, where they also donated a ton of school supplies, joined the kids for calisthenics and ended with lunch at the beach. “The feeling after doing a project like this is phenomenal,” Wentworth said. “Our guests are so energized and that good feeling permeates into everything else we do. Whether you clean a beach or lay on one, everyone contributes to the

good work being done.”

In four years, Sweet’s impact is profound:

- Over 6,200 trees planted in Mexico, Louisiana and Alaska.
- Over 60 stray dogs and cats have new homes in the United States and Canada.
- 21 feral cats sterilized and vaccinated in Mexico.
- 5 schools and parks painted and revitalized.
- 450 bags of trash removed from beaches.
- Over 3,300 hours of community service.
- More than 2,500 children’s books donated.
- 8 computers donated to children’s learning centers.
- And much more...

In addition to community service, Sweet offsets all its carbon. To learn more about Sweet, visit

www.DiscoverSweet.com



Expogays, a proud UNWTO Affiliate Member



With over 16,000 visitors, over 860 appearances in national and international media and 200 exhibiting companies, Expogays has established itself with just two editions as Spain's major exhibition for suppliers interested in diversity and the LGBT market in particular. Expogays is a product of SBR Productions, a multi content space with events such as conferences and dance performances, music and film in a wide and attractive staging for visitors to combine business and pleasure.

That is why we believe that Expogays' recent Affiliation to UNWTO helps to underscore the fact that the gay tourism segment is a booming industry. More and more establishments are declaring themselves as 'gay friendly'. The starting point of this "rainbow revolution" goes hand in hand with the gradual acquisition of social rights of the LGBT community in Spain. Financial analysts believe that the gay business is the "most profitable" to invest in now and they predict a growing "diversification" to create new consumer needs. All this gives more 'social power' to LGBT consumers.

We believe that the LGBT community has become the new gold mine in the

tourism sector. We estimate that Spain has about three million homosexuals who spends around 3.3 billion euros a year per person, at a rate of about 1,100 euros each. This group has a significant economic potential and can afford to travel often: 20% spend more than € 1,500 a year on travel.

We're proud that many Spanish cities are considered as 'gay havens'. Cities such as Gran Canaria, Ibiza, Benidorm, Torremolinos, Sitges and Madrid are among the favorite destinations for gay people. Wherever they are, we encourage destinations to come out of the closet ...

www.expogays.com



American Airlines' Commitment to Equality

American Airlines®

By Betty Young,
Manager, Diversity Markets, American Airlines



As the first airline to adopt employment nondiscrimination practices that include sexual orientation (1993) and gender identity and expression (2001), American Airlines is a pioneer in showing our respect towards lesbian, gay, bisexual and transgender (LGBT) customers and employees. American is also the only airline to earn a perfect 100% score on the HRC Corporate Equality Index every single year from the start.

These practices serve as the foundation for American Airlines' enduring marketing strategy of inclusion and welcome for LGBT customers too. We have learned that by maintaining trusted partnerships with top national nonprofits that promote equality, along with our LGBT inclusive supplier diversity program, we are poised to sustain a growing share of loyal, frequent travelers including LGBT households.

Beginning in 1994 with the Fortune 500's first LGBT sales professionals known as the Rainbow Team, we see these innovations as a foundation for the highly integrated approach we take to vertical

marketing. The airline's Diverse Segment Marketing philosophy, which includes LGBT stakeholders, today draws together Sales, Marketing, Advertising/Sales Promotion, Corporate Communications, Interactive Marketing, Diversity Strategies and the Diversity Advisory Council to focus on promoting American to diverse communities, including LGBT, women travelers, African American travelers, Hispanic/Latino travelers, and veterans. We believe that no other airline has such a longstanding, robust internal and external focus on diversity across all lines of business. The integrated approach connects with the airline's Corporate Responsibility initiatives in many forms – ethical governance, diversity and inclusion, safety, the environment, and corporate and employee giving. We also have amplified our advertising and marketing investments to include many LGBT media partners. In fact, GLAAD honored us this year and last, for our excellence in LGBT advertising. One of these awards singles out a memorable bus kiosk campaign on the streets of

New York last year, another pioneering concept.

We have launched the first airline microsite welcoming our LGBT customers, which combined with our e-Rainbow news, Facebook presence, and other digital initiatives, allows us to frequently step up engagement with customers in a friendlier two-way conversation. We also made it possible for our AAdvantage customers to self-identify their interest in LGBT travel, which will allow us to better know their needs and measure their satisfaction with our services and products.

While we cannot share proprietary sales data, in the future we intend to keep working hard to maintain our profitable lead in serving all of our diverse customers. That is especially true among the LGBT community who express their loyalty to first movers and are very willing to reward their longstanding, trusted partners.

www.aa.com





Destination survey: How do UNWTO and IGLTA Members reach out to LGBT consumers?

During the preparation of this report we conducted a brief, informal survey among selected destination management organizations (DMOs) that are Affiliate Members of UNWTO and IGLTA to discover their opinion on trends within the LGBT market itself, and what innovative actions they've taken to approach this market segment.

In particular, the DMOs were asked whether or not they carry out specific LGBT marketing activities, which trends they've noticed recently in this segment, if LGBT promotion has benefitted from LGBT-friendly legislation at national level and what the overall impact of LGBT visitors has been on the destination.

Overview

In total nine DMOs participated from seven different countries: Germany, Belgium, Portugal, France, Spain and Brazil. Logically, respondents who were members of IGLTA demonstrated an increased interest in the LGBT market and frequency of promotional activities. Of the UNWTO Members who responded (Barcelona Tourism, Zaragoza Tourism and the Portuguese Tourism Confederation), Barcelona detailed a variety of marketing actions and knowledge of this segment while the other expressed their desire to extend a welcome to LGBT visitors, an approach facilitated by recent pro-LGBT legislation at national level.

Promoting the destination to LGBT travellers

The majority of these highlighted that they carry out specific promotional activities targeted at the LGBT community, mainly participation in events and fairs as Gaygames, Gay Fun Ibiza, Gay Travel Fair-London, Rainbow Attitude-Paris, SIGL-Paris, Gay and Lesbian Travel Pavilion-ITB Berlin, Pink Corner SITC-Barcelona, Fitur LGBT-Madrid. Some respondents went further,

mentioning their support for national NGOs working in LGBT issues. A good example of this is Seville Tourism Board's work with COLEGA, a network of associations dedicated to achieving equal rights for LGBT people in Spain.

Working with IGLTA

ITB, Deauville, Antwerp, Seville, Florianopolis and Barcelona Tourism Boards all emphasised the importance for them of working with IGLTA, whether through hosting events, arranging fam trips through the Association or learning from market research. Hosting the IGLTA Annual Convention was considered to be a very effective means of making industry contacts, showcasing specific products and projecting a clear message of openness to the LGBT traveller.

Open and inclusive destinations

All destinations were keen to underline that the tourism sector as a whole benefits when a destination is regarded as being open, tolerant and welcoming to all visitors. In some cases, such as the Portuguese Tourism Confederation, this is set out clearly in the Confederation's CSR policy. Interestingly, the Amsterdam Tourism and Congress Bureau (arguably a long-established destination for LGBT travellers) stated that it was not necessary to specify the LGBT segment as a specific target group, since it could be included with other segments the city wishes to promote to. Florianopolis CVB was among the respondents that have observed a significant increase in LGBT visitors since legislation was passed approving same-sex unions while Zaragoza Tourism concluded that "tourism should always be understood as an activity that contributes to sustainability and progress among other things, and non-discrimination against any group in society".

We are very grateful for the following organizations for participating in this survey



Confederação do Turismo Português



Zaragoza
TURISMO



DEAUVILLE
Tourisme



FLORIANÓPOLIS e REGIÃO
Convention & Visitors Bureau



I amsterdam.

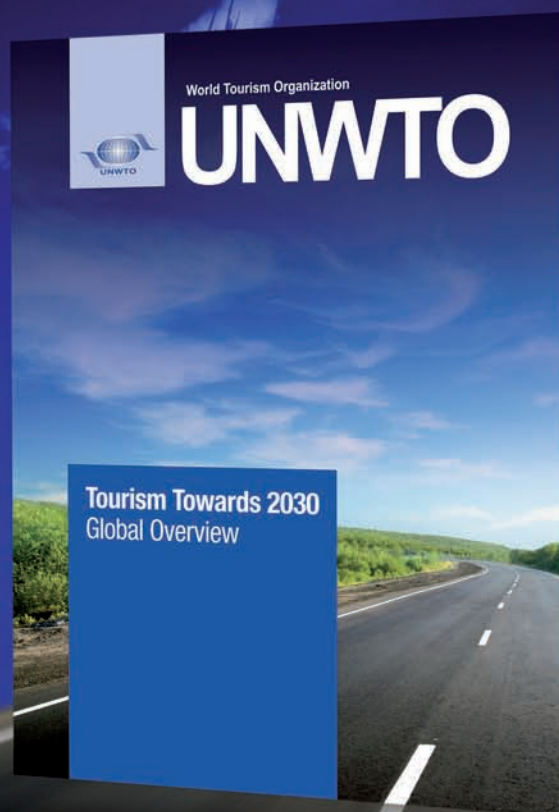


Sevilla
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Tourism Towards 2030

Global Overview

Presented at the UNWTO General Assembly in October 2011, Tourism Towards 2030 is a broad research project in continuation of UNWTO's work in the area of longterm forecasting initiated in the 1990s. It has the following objectives:

- Assisting UNWTO Members in formulating policies and long-term strategic plans;
- Providing a global reference on tourism future development;
- Reinforcing UNWTO's role in agenda setting for tourism-related subjects;
- Constituting a reference for UNWTO strategic documents, programme of work and activities.

Tourism Towards 2030 enriches existing forecasts with an overview of the social, political, economic, environmental and technological factors, which shaped tourism in the past, and are expected to lead development and growth in the future.

You can consult Tourism Towards 2030 online in the UNWTO e-Library www.e-unwto.org (free access for UNWTO Members) or purchase a copy through the UNWTO Infoshop www.unwto.org/infoshop (50% discount for UNWTO Members).



Community of UNWTO Affiliate Members

<http://www.platma.org/>

UNWTO Affiliate Members Programme presents **www.platma.org**, the professional online network for the Organization's Affiliate Members. The network was launched in January 2011 in collaboration with SEGITTUR and provides a space for the public and private sectors in global tourism to meet, share knowledge, experience and best practices using a range of multimedia tools.

What

Connect
Create
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How

Affiliate
Browse
Discover
Benefit

Why

Communication
Networking
Knowledge
Added value

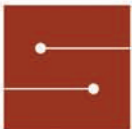
Platma is now open!

If you work in an affiliated organization, please email platma@unwto.org to register yourself and your colleagues. Each Affiliate Member organization is eligible for up to five individual user accounts. Guests can also be invited to participate for a certain period of time.

If you would like more information about platma or you wish to discover the benefits of affiliation to UNWTO, we will be happy to help you. Please contact:

UNWTO Affiliate Members - tel: +34 915678167 / 243
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Policy and Practice for Global Tourism

This major new publication from UNWTO is a guide to the major themes in world tourism today. Through 11 chapters, it presents an overview of topics ranging from sustainable tourism to social networks or emerging markets to creating a successful destination brand. Examples of UNWTO's work in key areas are highlighted throughout the publication, and these are complimented by case studies and opinions from business leaders, destinations management organizations, academics and NGOs.

In this comprehensive publication, UNWTO is proud to include contributions from over 30 Affiliate Members from around the world, as well as input from experts from the UNWTO Secretariat.

Policy and Practice for Global Tourism is aimed at decision makers working in the public and private sectors alike, as well as those who are simply interested in learning more about this fast-moving and dynamic sector of the global economy.

The publication is available to consult in electronic format in the UNWTO at e-Library www.e-unwto.org to which Affiliate Members can benefit from free access.

Policy and Practice for Global Tourism is now on sale through the UNWTO Infoshop at www.unwto.org/infoshop at the price of 50 EUR. UNWTO Members can benefit from a 50% discount on all purchases through the Infoshop.

To find out more about becoming an Affiliate Member of the World Tourism Organization visit

www.unwto.org

www.platma.org



The World Tourism Organization (UNWTO), a United Nations specialized agency, is the leading international organization with the decisive and central role in promoting the development of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 155 countries, 7 territories, 2 permanent observers and over 400 Affiliate Members.

UNWTO Affiliate Members bring together over 400 companies, educational & research institutions, destinations and NGOs whose activities are related to tourism and which contribute to the UNWTO their knowledge and expertise to promote the development of tourism that's responsible, sustainable and accessible for everyone. Over 80 countries are represented among the Affiliate Members, the world's premier forum for exchanging tourism knowledge.



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