

The European market potential for LGBTQ tourism

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LGBTQ tourism is a very promising market in Europe. The estimated LGBTQ population of Europe is approximately 5.9% of the total and the market value of LGBTQ tourism in just seven European countries (Germany, UK, France, Italy, Spain, Poland and Netherlands) combined is already €64 billion and expected to grow 1.4% per year on average. This group is very diverse, but one thing that is common to the entire group is to feel welcome and respected.

Contents of this page

1. [Description of the target group](#)
2. [What makes Europe an interesting market for LGBTQ tourism?](#)
3. [Which European countries offer most opportunities for LGBTQ tourism?](#)
4. [What trends offer opportunities in the European LGBTQ tourism market?](#)

1. Description of the target group

LGBTQ tourism refers to the tourism products and services created with special attention for the LGBTQ (lesbian, gay, bisexual, transgender and queer or questioning) community. These are products and services specially designed for LGBTQ tourists, including honeymoons and weddings. But LGBTQ tourism also includes services available for all tourists, while assuring LGBTQ tourists feel welcome and respected.

The LGBTQ segment cannot be treated as a homogeneous group because sexuality is just one part of people's lives and it is often not a reason for travelling. LGBTQ people vary in age, origin, marital status, whether they have children and many other aspects. There are also clear differences between generations. These differences are most notably between the boomer generation (born 1946-1964) and the millennial generation (born 1980-1995). Millennials, for instance, might not need anything specifically, but boomers who may have experienced discrimination in the past might want specific products and services and be recognised as LGBTQ travellers.

In at least [72 countries](#), LGBTQ people can still be imprisoned and prosecuted and in 12 countries, they can even be executed. There are many other countries where LGBTQ people are still socially excluded, in spite of not being treated as criminals. It is not surprising then that LGBTQ tourists go mostly to places where they can travel safely, favouring destinations perceived as friendly and accepting for local and visiting LGBTQ people.

LGBTQ tourists travel more frequently than non-LGBTQ tourists and have higher incomes than average. One reason for this may possibly be that many LGBTQ people form couples that have two incomes and no children, which is known in finance under the acronym DINK (dual income, no kids). However, changing laws and perspectives are giving rise to more families started by LGBTQ couples (see trends for more information). LGBTQ people may travel to unfriendly places, but not to places where local LGBTQ people are also threatened or badly untreated.

LGBTQ pride events and festivals often attract lots of LGBTQ tourists from other countries. In many places,

these events are one of the few moments when LGBTQ people can openly express and celebrate their sexuality. Examples of occasions that have many days or events specific for LGBTQ people include [carnival in Rio de Janeiro](#) and in [Barranquilla, Colombia](#). Some of the largest LGBTQ pride events in the world take place in [New York](#), [São Paulo](#) and [Madrid](#).

Tips:

- Understand the LGBTQ community before targeting this group. Visit conferences or take a course, for example, by [IGLTA](#) (the International LGBTQ+ Travel Association).
- Align your business with other LGBTQ friendly businesses nearby to improve your products and services. Contact IGLTA to find other LGBTQ friendly companies.
- Get LGBTQ tourists to write reviews or stories about your product or service to bring in new tourists. Like all other tourists, LGBTQ tourists also follow reviews and recommendations.
- Have a marketing presence throughout the year, not only in high season, to attract LGBTQ tourists.
- Go visit an LGBTQ event or festival near you to get to know potential customers and promote your business. The IGLTA has a [calendar](#) listing most of these events.

Lesbian travellers

In many cases, lesbian travellers identify as a woman first. Travel safety is very important for lesbians, as it is for women in general. Where most gay men prefer urban destinations, most lesbians enjoy more [rural destinations](#) and [nature tourism](#).

Tips:

- Target women and not specifically lesbian women. Genuine and consistent advertising promote products and services more effectively.
- Get your message right and make sure it is authentic if you are targeting lesbian women. Images and language in ads are important.

Gay travellers

Gay men tend to travel to urban destinations and are more interested in gay events and nightlife activities than others. Most gay men like to meet locals and other like-minded gay men when travelling. A popular tourism product specifically targeting gay men is gay [cruises](#). Gay men [tend to be very loyal to brands](#) that support and welcome them continuously.

Tip:

- Advertise on popular apps targeting gay men specifically like [SCRUFF](#). Like any other single people nowadays, gay men also use apps and online platforms to meet new people.

Bisexual travellers

Bisexual people enjoy the freedom of relating with men and women as they please, so there is no hard and fast way of labelling them as gay or straight.

Tips:

- Target bisexual travellers as all other travellers or through other lesbian and gay advertising, which may attract bisexual people, depending on whether they are in a relationship and who is their partner at the time.
- If you want to target bisexuals, be aware that using the words gay and lesbian excludes bisexuals. Like all other people, bisexuals do not want to be labelled one way or another.
- Avoid stereotyping bisexuals. It is very offensive, for example, to imply that bisexuals don't commit to relationships or that bisexuals prefer group sex and swapping partners.

Transgender travellers

Europe has relatively many transgender travellers. The European transgender traveller is generally highly educated and between the age of 35 and 55. Like all other travellers, transgender travellers want to be welcome in the countries they visit.

Tips:

- Implement non-discrimination and trans-friendly policies to ensure the safety and well-being of your guests. One simple measure is not assigning exclusive bathrooms for males and females.
- Educate your staff and other service providers to be [trans friendly](#).
- Provide transgender traveller directories to show trans-friendly businesses and gender-neutral bathrooms in the area.
- Be consistent with supporting the LGBTQ community in general. LGBTQ people in general are very loyal to brands that support and welcome them continuously.

2. What makes Europe an interesting market for LGBTQ tourism?

The LGBTQ tourism segment in Europe is very promising, since [5.9% of Europe's population](#) identify as LGBTQ. The segment may be even bigger, since nearly 10% of Europeans also identify as not only heterosexual. The worldwide LGBTQ travel and tourism market value [exceeded €196 billion in 2018, making it one of the biggest tourism markets](#). The leader in this market is Europe, with a €64.9 billion share growing 1.4% annually on average, followed by North America with €56.8 billion and an average annual growth of 1.9%.

Some Western European countries were among the first to legalise same-sex marriages, so people from these countries are much more confident to travel.

Tips:

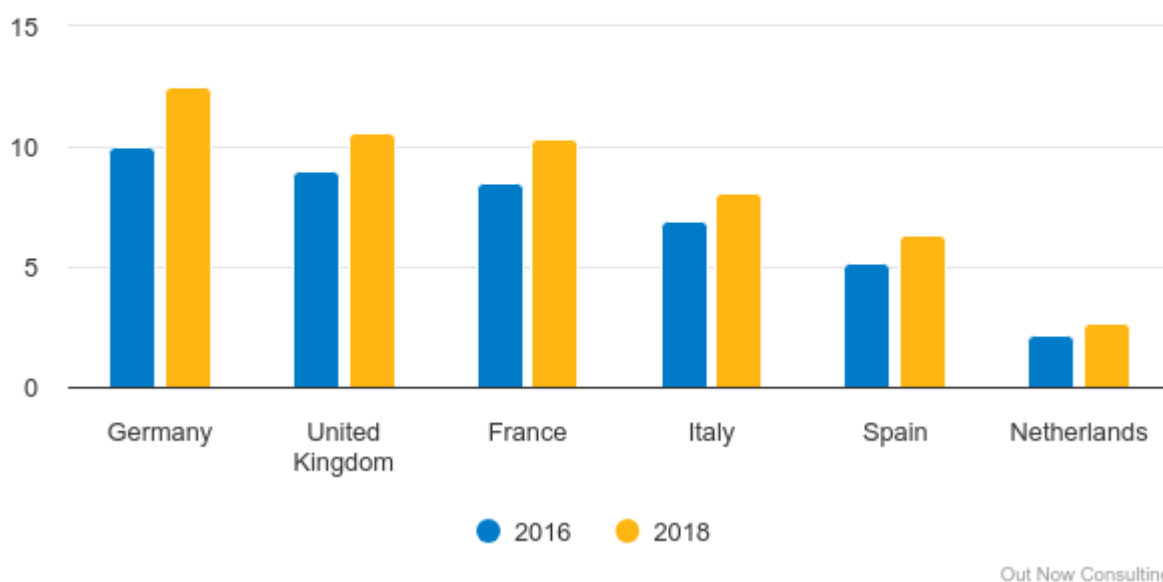
- Follow your local news to see if there has been any recent incidents of discrimination or intolerance against LGBTQ people. These problems will hold many LGBTQ tourists from visiting a place.
- Invite the LGBTQ community specifically to come visit and let them know they are welcome. LGBTQ tourists don't assume that they are necessarily welcome at a particular destination, but specific reassuring campaigns work in sending a welcome message. An example of this is [Rhino Africa](#), a safari company in South Africa founded by an LGBTQ entrepreneur, which provides special LGBTQ itineraries.

3. Which European countries offer most opportunities for LGBTQ tourism?

The best European LGBTQ tourism markets to enter are the countries that have high percentages of LGBTQ people in their populations: Germany (7.4%), Spain (6.9%) and the United Kingdom (6.5%).

According to experts, Western European LGBTQ people tend to travel to farther and to a larger variety of places than Eastern European LGBTQ travellers. These experts also point out that Eastern European LGBTQ travellers tend to mostly visit destinations widely known for being gay friendly, like London, Paris, Los Angeles and Amsterdam, where Western European LGBTQ travellers have been going for more decades now. Industry sources suggest that Western European LGBTQ people are now travelling to other parts of the world beyond Europe.

Figure 1: European LGBTQ tourism annual expenditure by country
in € billion



Germany has the largest LGBTQ market

Germany ranks 14th in the world on the [Gay Happiness Index](#), which includes public opinion on LGBTQ people, how they are treated by other people and their life satisfaction. This indicates that German LGBTQ travellers are used to having others be generally open minded about sexuality. Same-sex marriage has been legal in Germany since 1 October 2017. Berlin is viewed as one of the most gay-friendly cities in the world.

According to [UNWTO data](#), Germany is one of the main European source countries of LGBTQ tourists to South Africa, which is viewed as an [LGBTQ friendly developing country destination](#).

United Kingdom

The United Kingdom ranks 23rd in the world on the [Gay Happiness Index](#), which is not too bad a position among all countries in the world, but compared to other Western European countries it is low. Same-sex marriage has been legal in the United Kingdom since 2014.

The United Kingdom is also one of the main European source countries of LGBTQ tourists visiting South Africa, according to [UNWTO data](#).

France

France ranks 21st in the world on the [Gay Happiness Index](#), slightly better than the UK, but still low in comparison with other Western European countries.

France is one of the main European source countries for LGBTQ tourists visiting South America, [according to UNWTO data](#).

Italy

Italy ranks 40th in the world on the [Gay Happiness Index](#), suggesting that LGBTQ people feel more discriminated in Italy than the other countries described here. Italian LGBTQ travellers tend to travel more to destinations [which are well known for their gay-friendliness](#).

Spain

Spain ranks 13th in the world on the [Gay Happiness Index](#), better than most Western European countries. Same-sex marriage has been legal in Spain since 2005.

Netherlands

The Netherlands scores 8th in the world on the [Gay Happiness Index](#). In Europe, only Iceland, Norway, Denmark and Sweden rank higher. Dutch tourists show great interest in travelling to developing country destinations. The Netherlands is also one of the main European source countries for LGBTQ tourists visiting South America, [according to UNWTO data](#).

Tips:

- Focus only on one or two of the big markets above first, other markets can follow later. If your country is not very LGBTQ friendly, focusing on Western Europe is even more important, as tourists from this region tend to explore the world farther afield than people in other regions.
- Read about [which European countries have pro LGBTQ laws](#).
- Attract your target groups on LGBTQ fora and communities. Most countries have many communities and places where LGBTQ people unite, not only bars and clubs, but also [LGBTQ organisations](#).

4. What trends offer opportunities in the European LGBTQ tourism market?

LGBTQ friendliness attracts other tourists

Having a LGBTQ-friendly business shows that you are open and welcoming of everyone. Showing that you welcome LGBTQ tourists draws in other tourists as well.

Tips:

- Do not focus only on LGBTQ people. Communicate that you are open to everyone, use gender-neutral communication and address people and couples without singling out their gender or sexuality.
- Use symbols and signs on your website or in your store that show you support and understand the LGBTQ community, including the rainbow flag. If you are affiliated with the [IGLTA](#), promote it too.
- Learn more about LGBTQ consumers by for example by joining the [Out Now Business Class](#).
- Study the [HCR Corporate Equality Index](#) and the participating companies to become inspired.

Growing LGBTQ family travel

In the past, LGBTQ travel consisted mostly of solo or couples travelling, but family travels are now on the rise, since same-sex marriage and adoption by same-sex couples have been legalised in many European countries. Note that LGBTQ families can be any family with an openly LGBTQ family member, but most consist of a same-sex couple with young kids or LGBTQ adults travelling with other family members. Same-sex parents with kids prefer to travel to LGBTQ-friendly destinations but without specific LGBTQ programming. A family holiday for them is, like for any other family, just a family holiday. Period. It is secondary for them that the destination should be LGBTQ friendly, so they do not care if there is LGBTQ-specific nightlife, businesses and accommodation. There is not much competition in this niche market yet.

Tips:

- Do not push the LGBTQ theme when targeting LGBTQ families. LGBTQ parents with kids look for regular family travel experiences, not only their LGBTQ friendliness.
- Develop programming for kids. Most destinations targeting LGBTQ people focus on adults, so marketing to families may create opportunities. [R Family Vacations](#) is an agency focusing on family trips, explicitly catering to families of any formation.

South America growing

The situation for the LGBTQ community and tourists in South America is slowly improving. Argentina was the first in the region to legalise same-sex marriages in 2010, but it is now also legal in Brazil, Colombia, Ecuador and Uruguay. Overseas LGBTQ tourists already visit Argentina, Brazil, Colombia and Uruguay, where there are also many LGBTQ events. The countries in the continent, especially Peru, Bolivia, Chile, Guyana, Paraguay, Suriname and Venezuela, receive fewer LGBTQ visitors because they are perceived as non-LGBTQ friendly places.

Tips:

- Look for LGBTQ events and festivals around you and offer a product or service connected to it. LGBTQ tourist who travel to attend these events also want to do more on location than just going to the event itself, which is where your opportunity may lie.
- Remember that the South American summer goes from January to March, the winter months in Europe, and that is when European LGBTQ tourists travel to South America.

Rise in same-sex weddings and honeymoons

As same-sex marriages are progressively legalised in various countries, the market for destination weddings, anniversaries and honeymoons for same-sex couples is growing. This is a very lucrative niche; destination weddings are mostly high-expense occasions, which also attract guests and sometimes staff, in addition to the couple and their families.

Tips:

- Make sure your destination and hotel are LGBTQ friendly and staff has received sensitivity training.
- Ensure privacy for the celebration, including hiring security if necessary.

This study was carried out on behalf of CBI by [Molgo](#) and [ETFI](#).

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