



# The Impact of LGBTQ+ Social Actions and Marketing on Destination Perception



THE **DATA APPEAL** COMPANY  
ALMAWAVE GROUP

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# Embracing the LGBTQ+ travellers: a game-changer in the perception of the tourism destination

The LGBTQ+ community is a promising and growing market within the tourism industry. Year on year, data consistently indicates that LGBTQ+ individuals tend to travel frequently and have a significant purchasing capacity, making them an attractive target audience for travel businesses and destinations.

According to [Auston Matta](#), the Marketing Director of The International LGBTQ+ Travel Association (IGLTA), the **LGBTQ+ community is among the first to resume travelling after catastrophic events**, such as the Covid-19 pandemic and 9/11.

Established in 1983 as a network of 25 travel businesses, IGLTA has now grown to include over **80 countries** and has since then partnered with major names in the travel industry, including Delta Air Lines, Marriott, Hilton, and Disney Destinations.

The global LGBTQ+ community has **an estimated spending power of 3.9 trillion dollars in the global economy each year**. In the USA, the community spends around 10% of its purchasing power on travel, which amounts to nearly \$100 billion ([Skift](#)).

These figures, and many others, show that the level of acceptance and inclusivity shown towards the LGBTQ+ community by a destination can significantly affect the overall success of tourism in various ways.

**To evaluate the impact marketing and social actions have on the overall perception of destinations, we chose some cities and regions that stood out in recent years for their LGBTQ+ friendly initiatives.**

We analysed the following European destinations through our LGBTQ+ Index:

- **United Kingdom**
- **Spain**, with focus on Madrid, Barcelona, and Gran Canaria
- **Copenhagen** (Denmark)
- **Tuscany and Puglia** (Italy)

For each of these destinations, we assessed **the change in the LGBTQ+ Index** following their implementation of targeted tourism marketing campaigns and initiatives promoting inclusivity and gender equality within the community.

The LGBTQ+ Index is one of Data Appeal's proprietary indexes. It evaluates the LGBTQ+ friendliness of a destination or business based on customer and visitor opinions.

Using artificial intelligence techniques and specialised semantic analysis, the index analyses all online content, comments, and reviews of a territory to assess the extent to which it is considered LGBTQ+ friendly.

***Learn more about our [LGBTQ+ Index](#)***



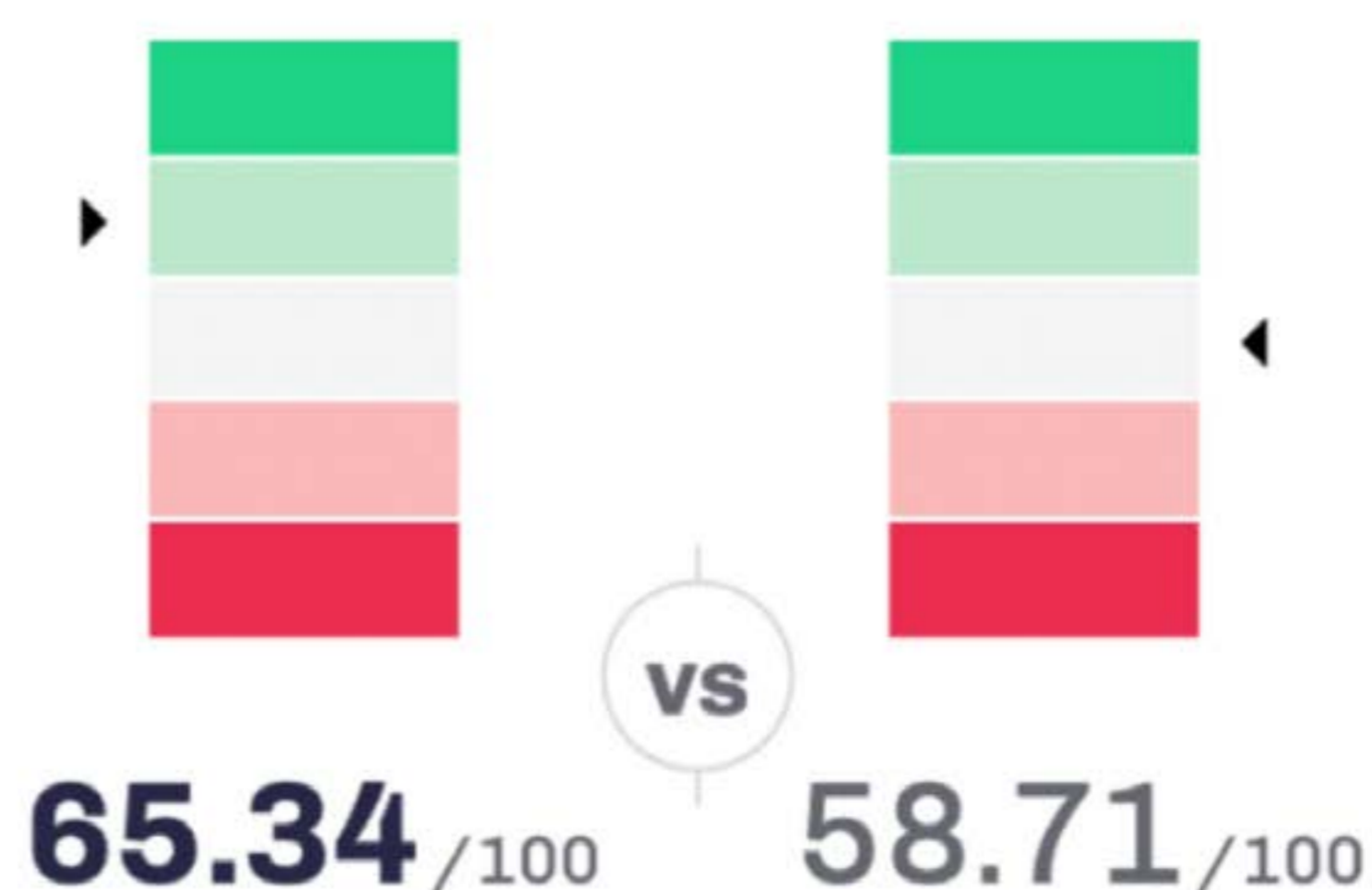
# United Kingdom

VisitBritain's latest equality, diversity, and inclusion (EDI) campaign, **"Love is GREAT"**, marks a significant milestone for the UK. Launched in 2020 and coinciding with the 50th anniversary of the decriminalisation of homosexuality in England and Wales, this campaign aims to celebrate the progress made in LGBTQ+ rights and inclusivity while attracting LGBTQ+ audiences and influencers from the United States and Australia.

According to Data Appeal's LGBTQ+ Index, there has been a significant increase in inclusivity compared to 2019, with the index rising from 59/100 to 65/100. This remarkable 6-point increase indicates that members of the LGBTQ+ community feel much more comfortable and welcome during their stay in the UK.

## LGBTQ+ INDEX NEW

This index measures the perception of LGBTQ+ inclusion from online content.



(Comparison in LGBTQ+ Index: Apr 22 - Apr 23 vs Jan 19 - Dec 19)

# Spain

Spain has emerged as an ideal destination for LGBTQ+ travellers, thanks to its progressive laws and widely embraced liberal attitudes. The country's cities, coasts, and islands — particularly Madrid, Barcelona, and Gran Canaria — have become popular destinations among the LGBTQ+ community.

## Barcelona

Catalonia's capital is dedicated to promoting diversity and inclusivity, focusing on sexual and gender diversity. To this end, the city has initiated a municipal plan called “Measures for LGBTI Equality 2016-2020,” which outlines specific actions to promote LGBTI policy within the city.

## Madrid

On its [official tourism website](#), Madrid proudly declares, “Whoever loves you, Madrid loves you”. The city has a thriving LGBTQ+ tourism scene, with over 350 events every year, more than 500 LGBTQ+ businesses and many gay-friendly places to visit. AEGAL (Association of Companies and Professionals for Gays and Lesbians in Madrid and the Madrid Region) works hard to promote Madrid as a year-round destination for LGBTQ+ community tourists.

## Gran Canaria

The second-most-populous island of the [Canary Islands](#) declares to be “one of the greatest gay tourist centres in Europe”, with its official tourism website featuring an entire [gay-friendly travel section](#).



Spain's increasing efforts to promote itself as an LGBTQ+ friendly destination significantly impact how the country and its major cities are perceived.

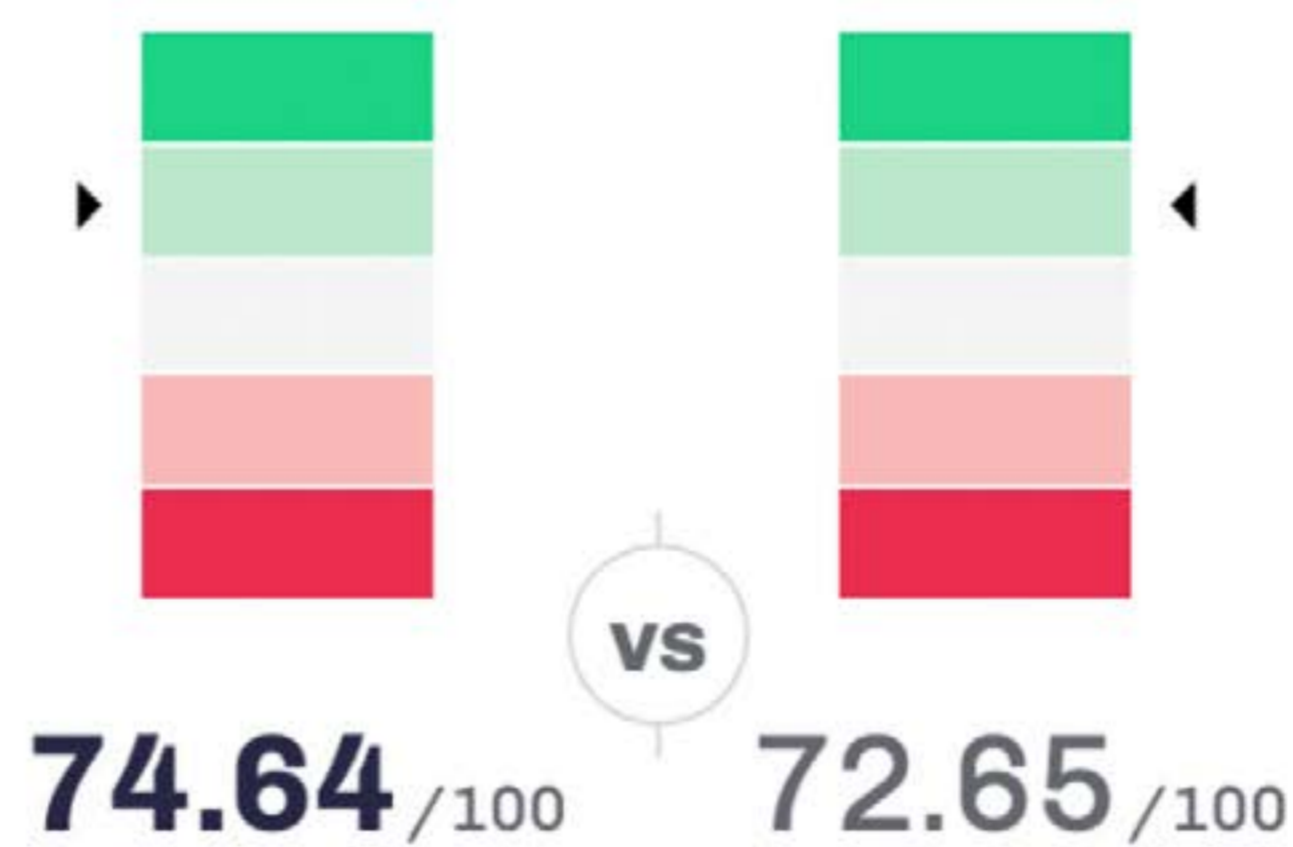
According to Data Appeal's LGBTQ+ Index, Barcelona, Gran Canaria, and Madrid have achieved consistently high scores, with Barcelona scoring 81 out of 100 and Gran Canaria and Madrid scoring 84 out of 100. These scores have improved by 5 to 11 points since 2019.

Spain's overall score is a remarkable 75 out of 100, showing a 2-point increase from 2019.

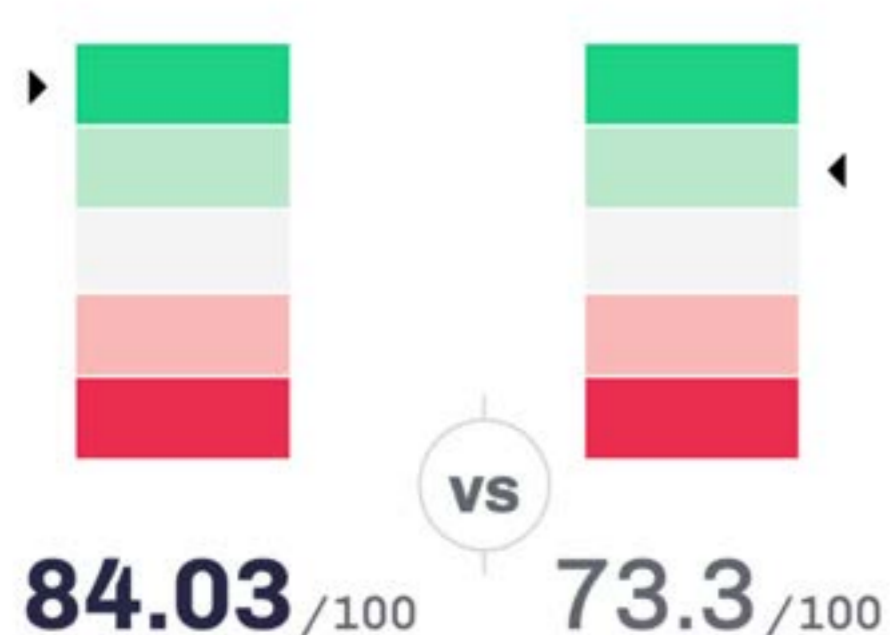
## SPAIN

### LGBTQ+ INDEX NEW

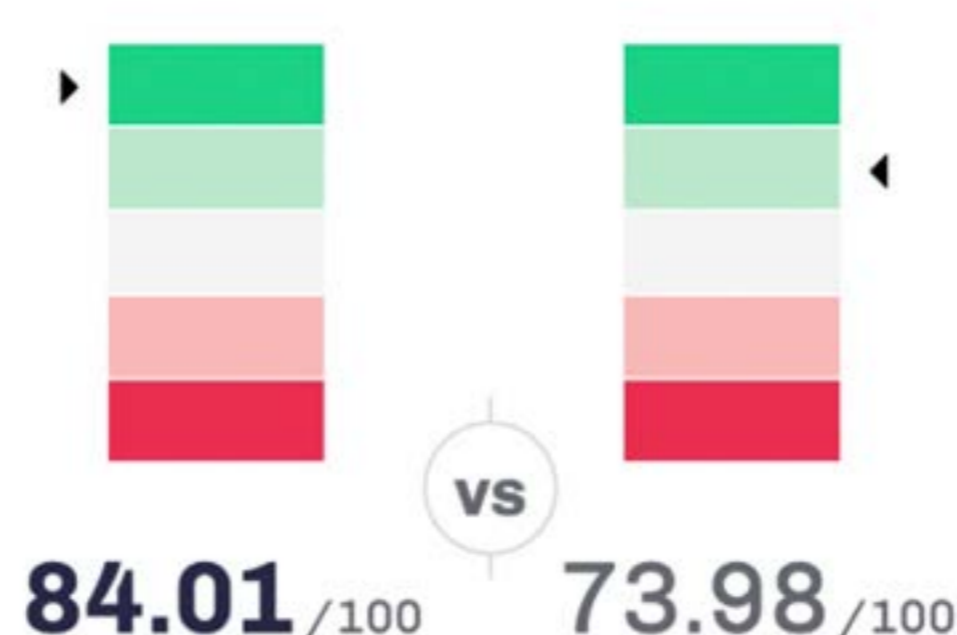
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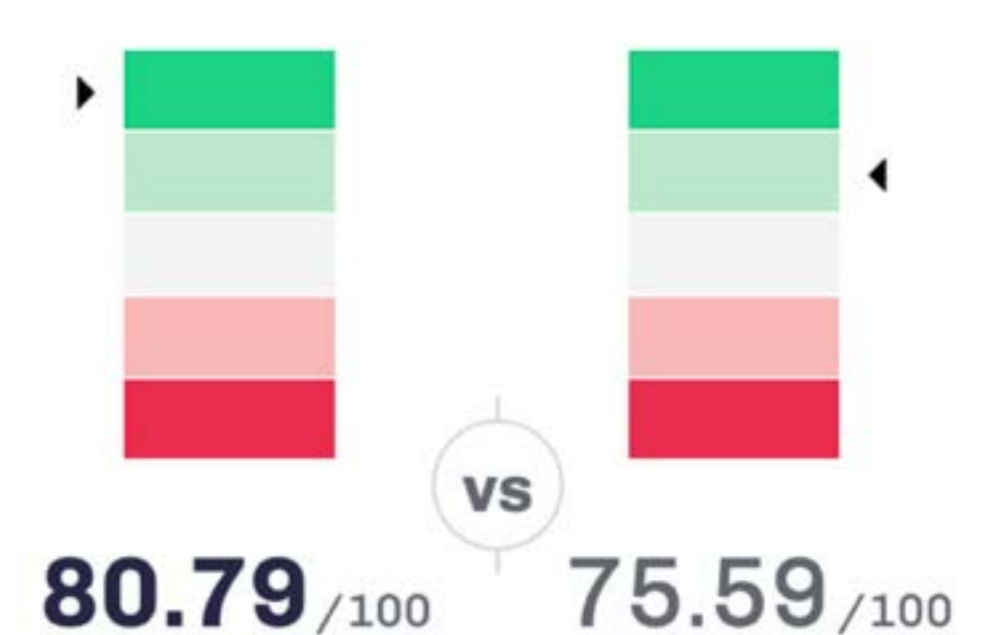
### GRAN CANARIA



### MADRID



### BARCELONA



(Comparison in LGBTQ+ Index: Apr 22 - Apr 23 vs Jan 19 Dec 19)



# Copenhagen

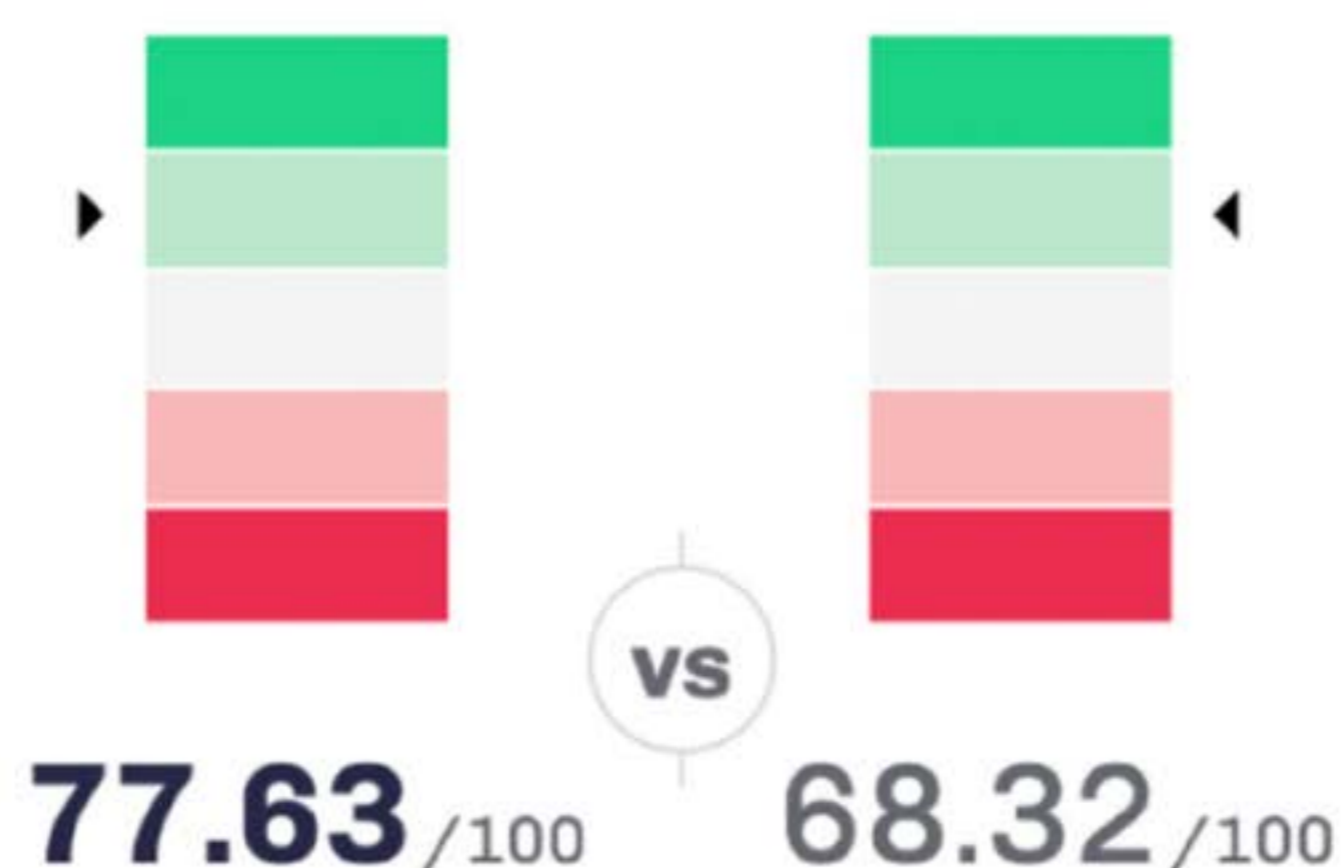
Denmark is known for its commitment to “**tolerance, freedom, and equality**”. In fact, the country made history in 1989 by being the first in the world to legally recognise same-sex marriage.

The Danish capital hosted Copenhagen 2021, a monumental event that celebrated love and equality, promoted inclusivity, and raised awareness about LGBTQ+ rights and issues. The event, organised by the **Rainbow Alliance**, held the slogan “#YouAreIncluded” and brought together various stakeholders, including businesses, authorities, funds, politicians, sports and civil society organisations, educational institutions, and professional operators, all committed to making a difference and supporting the cause.

According to The Data Appeal Company’s study, the LGBTQ+ Index in Copenhagen has experienced a significant improvement. The score increased from 68/100 in 2019 to an impressive 78/100 in 2023, indicating notable progress.

## LGBTQ+ INDEX NEW

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(Comparison in LGBTQ+ Index: Apr 22 - Apr 23 vs Jan 19 - Dec 19)



# Italy

In 2022, Italy hosted the 38th **IGLTA World Convention**, a prestigious event promoted by national tourism organisations AITGL and ENIT, in collaboration with the Municipality of Milan, the US Consulate, and the European Travel Commission.

**The value of Gay Tourism in Italy is estimated to be around 2.7 billion euros, as reported by AITGL - Sonders&Beach.** LGBTQ+ travellers tend to have a higher average income of 38% compared to heterosexuals, and they frequently travel for both leisure and business purposes.

So Italy, in partnership with Sonders&Beach and RINA - International Certification Body, has initiated the QueerVadis Certified® program. This international certification program is designed for tour operators, hotels, and DMOs (Destination Management Organisations) to address DE&I topics. A globally-renowned certification, already adopted by many organisations worldwide.

**Our analysis focuses on some of the areas most frequented by LGBTQ+ travellers – Tuscany, including the Versilia area, as well as Salento in the Puglia region.**

## Tuscany and the province of Lucca:

Tuscany and the province of Lucca are promoting LGBTQ+ friendly itineraries and experiences in collaboration with GayFriendlyItaly to revive tourism after the Covid-19 pandemic. The region has launched the **Charter of Values for Inclusive Tourism**, which aims to promote diversity and raise awareness to cater to this clientele. Versilia and Torre del Lago in the province of Lucca have been popular destinations for LGBTQ+ travellers in Italy for some time now.

## Puglia and Salento:

Salento refers to a geographic region located in the southern part of Puglia. Since 2019, it has been promoted as a **gay-friendly tourism destination**.

The province of Lucca has increased by around 11 points compared to 2019, achieving an impressive score of 90/100.

The Versilia coast boasts one of the highest scores recorded in Italy, reaching 92/100.

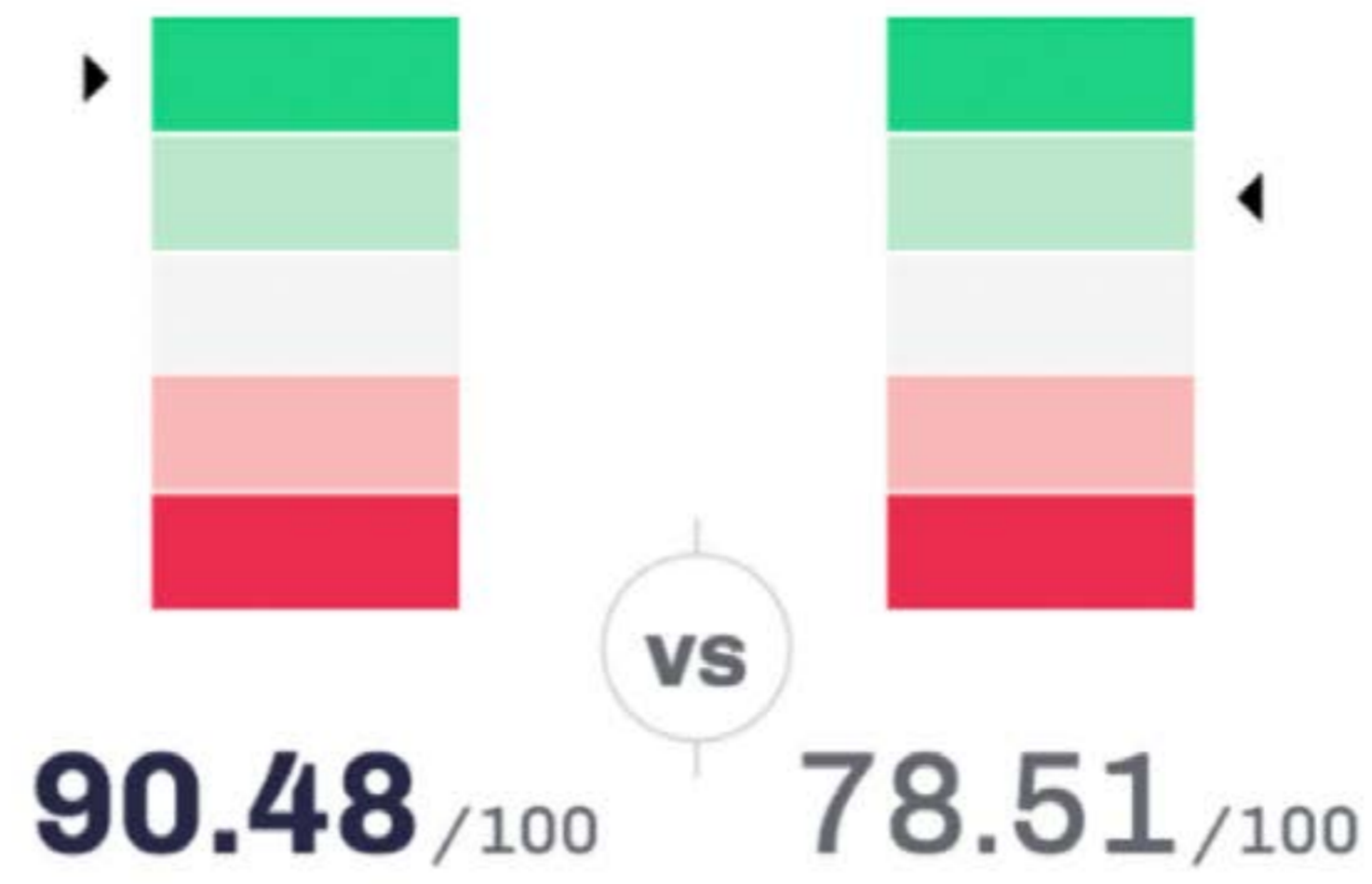
Salento is becoming increasingly popular among the LGBTQ+ community, as shown by Data Appeal's LGBTQ+ Index. In fact, its score went from 69/100 in 2019 to 89/100.



PROVINCIA DI LUCCA

**LGBTQ+ INDEX** NEW

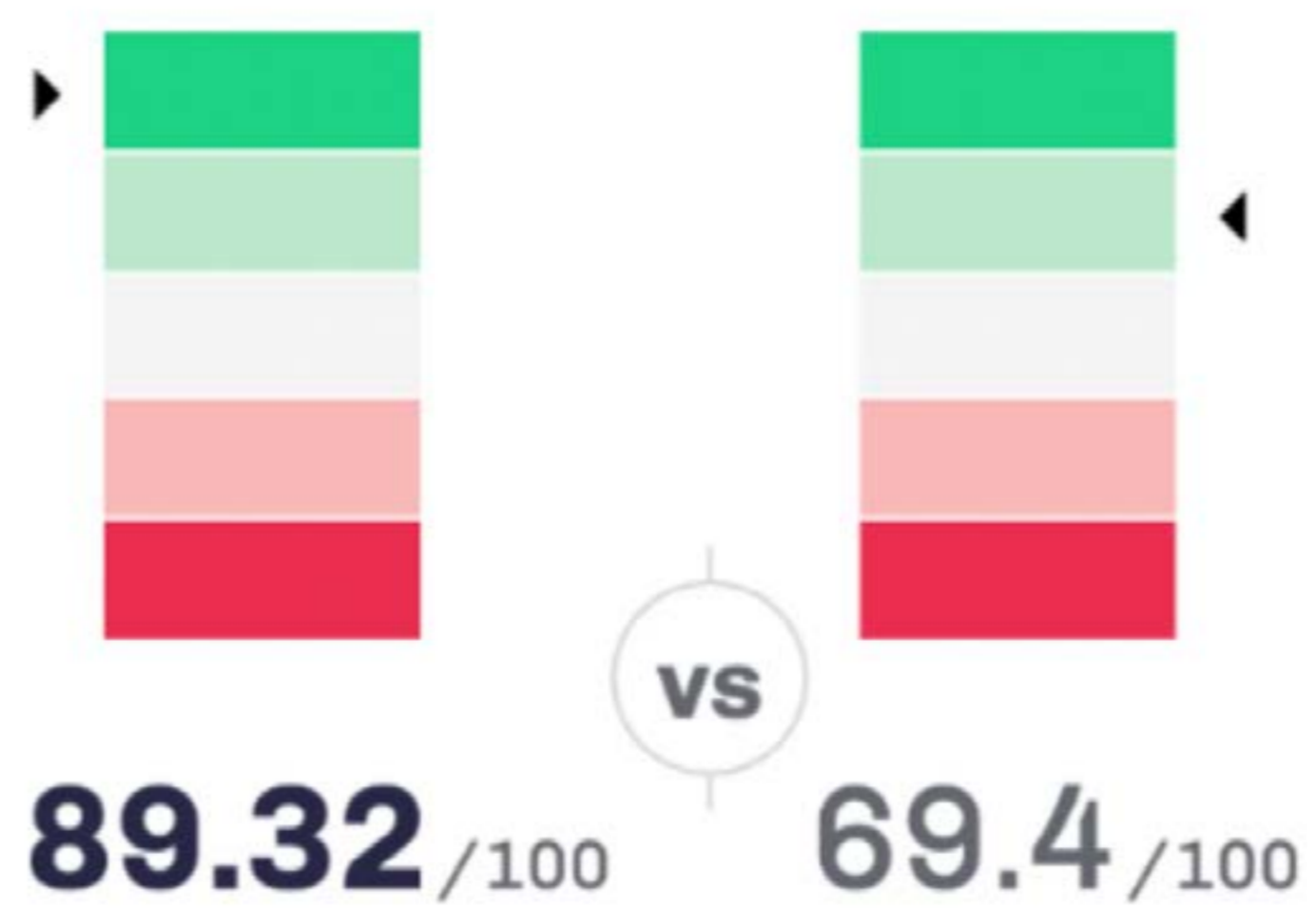
This index measures the perception of LGBTQ+ inclusion from online content.



VERSILIA

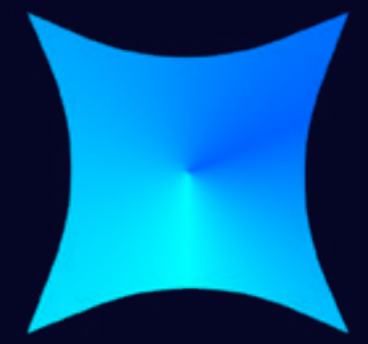


SALENTO



(Comparison in LGBTQ+ Index: Apr 22 - Apr 23 vs Jan 19 - Dec 19)

# Methodology



To allow for objective comparison, the periods under consideration are **April 2022 - April 2023 compared to January - February 2019**. The years 2020 and 2021 were not taken into account as the significant decrease in the volume of online content published, due to the impact of the pandemic, did not allow for a representative analysis.

**The Data Appeal Company (formerly Travel Appeal) – acquired in 2022 by Almax Spa, a company listed on the Euronext Growth Milan market of Borsa Italiana and part of the Almax Group – is an AI-based solution provider which enables the actionability of data from a broad range of sources.** It provides the most powerful combination of Location, Sentiment and Market Intelligence datasets for any Point of Interest, brand or territory worldwide.

Through its proprietary techniques, Data Appeal collects, evaluates and monitors the digital presence of POIs (points of interest) across any territory through the analysis of **over 130 online sources**, including review channels, portals, websites, OTAs, and social media. Our methodology uses a one-of-a-kind algorithm that recognises and reconditions channels, ensuring a high probability that they are connected to the same POI.

We go through a thorough process to **ensure the quality of data**. Then, we examine the features of each detected POI, including its location, type, and available services, as well as its customer base, including its origin, language, and the kind of trip they are taking.

Our proprietary artificial intelligence mechanisms analyse the digital human experience in its original form, such as reviews, opinions, comments, and ratings. **This analysis is done in natural language, identifying the content's logic and emotional tone.**



## LGBTQ+ Index:

The LGBTQ+ Index is a key element of a collaborative development program between Data Appeal and Sonders & Beach, an international group of specialised companies focused on the LGBTQ+ market, aimed at evaluating the online perception of tourist destinations, hospitality, and tourism operators in terms of inclusivity.

Sonders&Beach has also partnered with The Data Appeal Company to create a tool — based on the existing protocol used for the Queer-Vadis label — that can assess how a destination, hotel, or tour operator is perceived online and how inclusive they are.

**The LGBTQ+ Index is the result of a complex algorithm that uses artificial intelligence techniques and specialised semantic analysis to analyse online content, comments, and reviews to assess the level of LGBTQ+ friendliness of a location or company.**

The result is a single synthetic index from 0 to 100: the higher the number, the more LGBTQ+ friendly the subject of the analysis is.

This is just the first step in building a more comprehensive **“Inclusivity Index”**, which is currently under development.

The LGBTQ+ index is suitable for any destination: specific locations, regions and entire countries. It can be integrated with existing business intelligence platforms through API.

It's also available on [Data Appeal Studio](#), the first all-in-one destination marketing and management platform.