

Out Now Global LGBT2020 Study



2013 edition. Public report.
Brazil travel data.

July 2013
edition

Contains
2012 updates
+ 2010 BR sampling



The world's best strategic insights
into global LGBT communities

Out Now. Leadership.

Out Now is the global LGBT marketing specialist. For two decades our clients have reaped the results of our Next Level Thinking to take their campaigns and strategies to market-leadership positions. Out Now constantly delivers what's next in LGBT marketing to our clients.

Research

"Out Now's experience in delivering research into this market, and analysing the data and outcomes, has given us fantastic insight and is pivotal in our market-leading approach."

Val Thorpe
Diversity & Inclusion Manager
Lloyds Banking Group



Communications

"Out Now's output has proved to be of a very high standard; executions have been on time and within budgets and day-to-day communications have been exemplary."

Jeanette Schuchmann
Deputy Director
German National Tourist Office



Strategy

"Your insights and proactive help with the development of the programme and launch logistics have been invaluable."

Lucinda Khun
New Products Manager
Merck Sharp & Dohme



Training

"With the advantages of this innovative learning programme, staff are able to deliver superior service to our lesbian and gay visitors."

Ralf Ostendorf
Sales Director
Berlin Tourismus & Kongress



Out Now works hard for clients. Our campaigns win awards, and more importantly — we get results for clients like Lufthansa, IBM, Toyota, Berlin Tourismus & Kongress, Merck Sharp & Dohme, Time Inc. Magazines, Doubleday Books, Lloyds TSB, Barclays and Citibank. **Get in touch with Out Now to discuss how we can take your LGBT marketing to the next level.**



More information? Visit www.OutNowConsulting.com

LGBT2020 - Brazil - 2013



Number of respondents

Viewed 8,390 Sample 2,864



About LGBT2020

The Out Now Business Class LGBT2020 research project is the largest study into the lives of LGBT people globally that has ever been undertaken.

To date the study has sampled nearly 100,000 people globally - gays, lesbians, bisexuals and transgender people in twelve languages from 21 countries on six continents on many aspects of their lives. From LGBT travel and tourism patterns, lifestyle habits, consumer expenditure, incomes, spending, discrimination and entertainment preferences - the LGBT2020 project is a groundbreaking project from Out Now which is giving unparalleled insight into the lives of real LGBT people from all over the world.

Out Now's research relied on the responses of 2,864 Brazilian - LGBT respondents and has been drawn for this report from two samples undertaken during both 2010 and 2012. Surveys were conducted online and collected in association with community organisations, social media networks and leading LGBT media in Brazil to provide the broadest possible sample from the LGBT2020 research study.

Countries sampled in 2012 for the LGBT2020 research report now include: Argentina, Australia, Austria, Brazil, Canada, Chile, Ecuador, France, Germany, India, Ireland, Israel, Japan, Mexico, Netherlands, Peru, Poland, Turkey, United Kingdom, United States, Uruguay.

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Contents	Free report	Full report	Contents	Free report	Full report
Global travel spend	✓	✓	Internet use from mobile phone		✓
Most popular aspirational travel destinations	✓	✓	Percentage holding valid passport	✓	✓
Length of relationship	✓	✓	Importance of genuine warm welcome	✓	✓
Relationship status	✓	✓	Hotel booking channels		✓
Intention to become parents	✓	✓	Airline booking channels	✓	✓
Education levels	✓	✓	Number of hotel nights stayed by star rating	✓	✓
Advertising - optimising media, optimising messaging		✓	Importance of Pride or LGBT cultural event		✓
Media usage - summary	✓		Leisure journeys by mode of transport	✓	✓
Media usage - full		✓	Business journeys by mode of transport	✓	✓
Internet usage	✓	✓	Importance of staff training	✓	✓
Social media usage		✓	Importance of equal opportunities employment policies		✓
Usage LGBT dating websites		✓	Sponsorship efficacy		✓
Personal internet use	✓	✓	Marketing efficacy		✓

Each report is available in two formats - The public data report and the full data report. Details of the contents of each report are listed below. **This is the Brazil Public Report.**

The full copy of each report is available free for members of Out Now Business Class. To register please visit www.OutNowBusinessClass.com.

Reports are available from the following countries: Argentina, Austria, Australia, Brazil, Canada, Chile, Ecuador, France, Germany, India, Ireland, Israel, Japan, Mexico, Netherlands, Peru, Poland, Turkey, UK, USA, Uruguay.



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About LGBT2020

This report is part of a global study into the lives of LGBT people in over 20 countries around the world. The LGBT2020 research project is a ten year project that in 2013 will reach an increasing number of LGBT people in more countries globally.

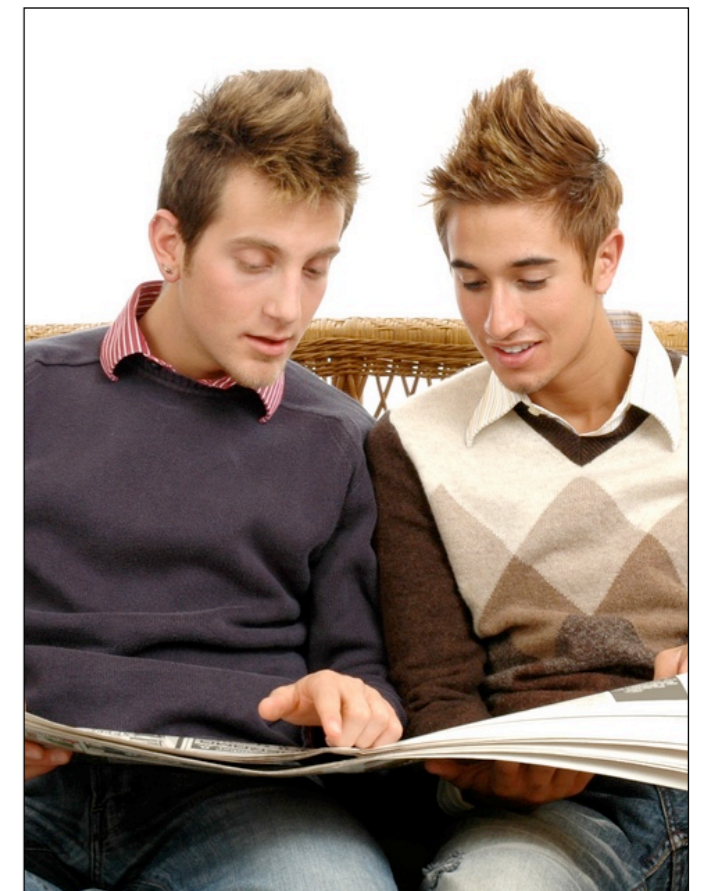
This is a summary data report of the global results from the findings of this study from the Brazil sample. You can download the reports for all of the countries from the LGBT2020 study online at www.OutNowBusinessClass.com - where these reports are free for members.

In 2013, the LGBT travel and tourism market is valued at **USD\$181 billion globally** based on Out Now Global's latest LGBT2020 research findings. This figure represents countries where there is a viable LGBT media and community infrastructure to effectively reach consumers. With increasing access to the internet globally, the actual scale of the market opportunity is even greater - with the reach and market impacts of effective LGBT-tailored communications able to reach a growing number of consumers in markets all over the world. Out Now has for over two decades pioneered the development of new LGBT markets and will continue to do so in coming years - including markets in Latin America, Asia and Africa.

There is no such thing as an LGBT census and LGBT2020 strives at all times to deliver world's best standards of reach and representation in all samples comprising this study. Out Now partners with the leading LGBT media in each country, as well as connecting with community groups and associations and social media platforms to distribute the research as widely as possible.

From August 2013 Out Now launches our latest round of data collection - and will collect data from even more countries globally. Companies, destinations, media partners, community groups and associations who want to be part of this ground-breaking initiative are welcome to contact us for more details on how they can become involved.

Out Now Global, The Hague, Netherlands. July 2013.



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The value of the global LGBT tourism market

Country	USD\$ billions	Rank population	Rank value	Per capita USD	Rank per capita annual spend
USA	52.3	1	1	\$3,472	2
Brazil	22.9	2	2	\$2,583	12
Japan	18.5	3	3	\$2,799	9
Mexico	9.2	4	7	\$1,847	15
Germany	12.1	5	4	\$2,858	8
Turkey	5.1	6	12	\$1,447	16
France	10.2	7	5	\$3,186	6
United Kingdom	9.7	8	6	\$3,112	7
Italy	8.5	9	8	\$2,667	10
Spain	6.2	10	9	\$2,593	11
Argentina	3.9	11	13	\$2,060	13
Poland	3.8	12	14	\$1,931	14
Canada	6	13	10	\$3,454	3
Australia	5.6	14	11	\$5,183	1
Netherlands	2.7	15	15	\$3,248	5
Israel	1.1	16	16	\$3,297	4
India* Only 5.1%	3.2	-		\$1,245	17

LGBT market global spend figures - travel and tourism 2013

All figures are based upon 6% of the adult population (16 years plus) being gay or lesbian (source: Out Now Business Class 2013 / Yankelovich MONITOR, 1993).

The USA market tops the league at USD\$52.3 billion, followed by Brazil (USD\$22.9 billion) and Japan (USD \$18.5 billion). Europe is a larger LGBT market than the USA with the total value of the seven most important markets in Europe (USD\$53.2 billion) being larger than the entire US market. Latin America's most important three markets account for an additional USD\$36.0 billion.

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Data source: Out Now Global LGBT2020 Study
www.OutNowConsulting.com - India data weighted to reflect internet prevalence.

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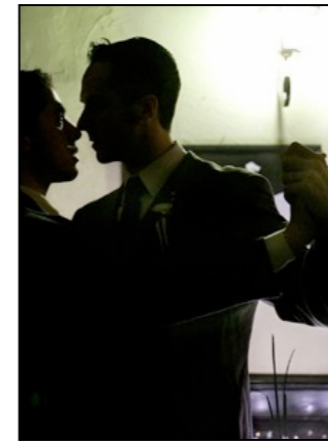
Most popular travel destinations



European Cities
1. Paris
2. London
3. Madrid
4. Amsterdam
5. Barcelona
6. Rome
7. Venice
8. Berlin
9. Prague
10. Munich



North American Cities
1. New York
2. Las Vegas
3. San Francisco
4. Miami
5. LA/West Hollywood
6. Toronto
7. Vancouver
8. Chicago
9. Montreal
10. Quebec



Africa/Lat Am Cities
1. Buenos Aires
2. Rio de Janeiro
3. Florianopolis
4. Cancun
5. Sao Paulo
6. Mexico City
7. Punte del Este
8. Cuzco
9. Cape Town
10. Bogota

Asia/Australia Cities
1. Sydney
2. Tokyo
3. Hong Kong
4. Melbourne
5. Gold Coast
6. Beijing
7. Singapore
8. Bangkok
9. Auckland
10. Adelaide

Country
1. Argentina
2. France
3. Italy
4. England
5. Spain
6. USA
7. Greece
8. Germany
9. Canada
10. Chile



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Executive summary

Brazil is Latin America's largest market by virtue of the size of its population of 201 million people. Based upon 6% of the adult population (16 years plus) being gay or lesbian (source: Out Now Business Class 2013 / Yankelovich MONITOR, 1993) we estimate that there are 9 million gay or lesbian people in Brazil.

This also makes this one of the largest reachable LGBT populations in the world, as Brazil now has a well established LGBT community throughout the country, and also a substantial enough media infrastructure to obtain a viable LGBT sample of this market. This report reflects the total sample - however there are sufficient numbers of respondents in the Brazil sample to report on sub-samples within this group broken down by gender.

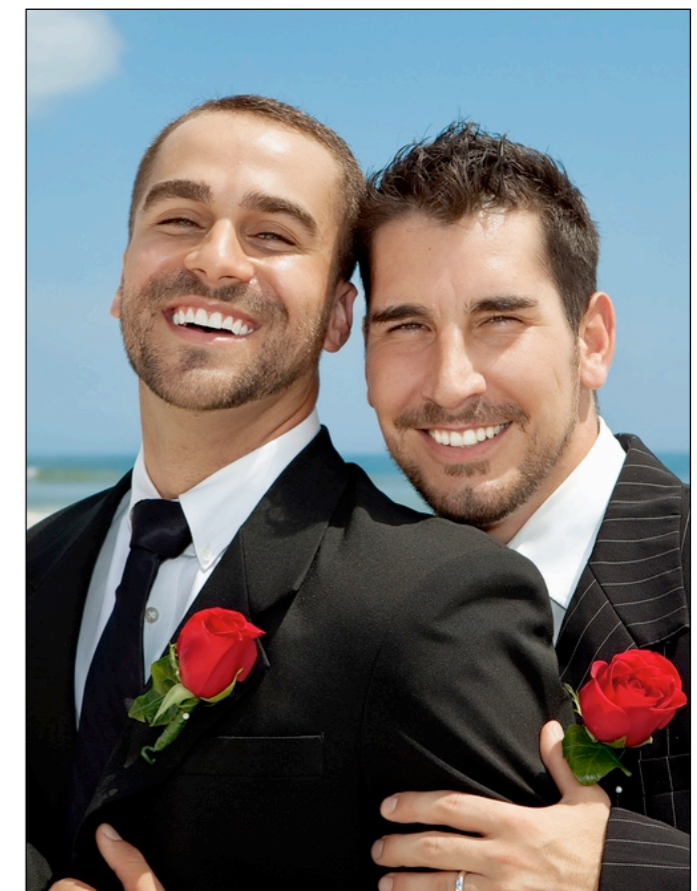
There are several notable differences in the data from other countries including the intention to marry, which has a high prevalence for all Brazilians when compared to some other markets, and media usage patterns are unique and varied.

Those interested in tapping into the international travel potential for LGBT Brazilians should be aware that only 50% currently hold a valid passport, but this still represents a sizeable potential market.

Another striking factor is the extent to which effective targeted communications, staff training, sponsorship, marketing, advertising and promotions can positively influence this market. The research suggests that targeted, consistent and well-thought-out campaigns can resonate well with LGBT Brazilians, for a variety of goods, services, products and destinations.

Key points to note from the total Brazil sample include:

- 78% would like to, and a further 5% have already, entered into Civil Partnerships. This has major connotations for the honeymoon and weddings market. Marriage Equality is currently legal in seven states and the federal district of Brazil.
- 62% of respondents would be motivated to choose a company that trains its staff to better understand the needs of LGBT people.
- A combination of sponsorship, effective marketing, community support and strong corporate equality policies can be powerful in motivating this market and influencing brand selection and purchasing decisions.



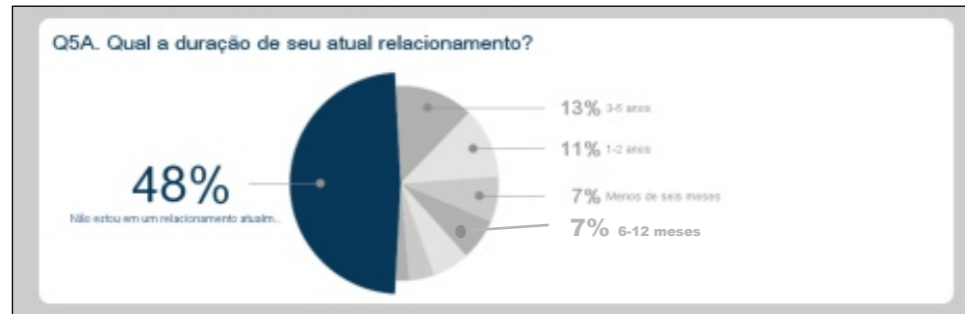
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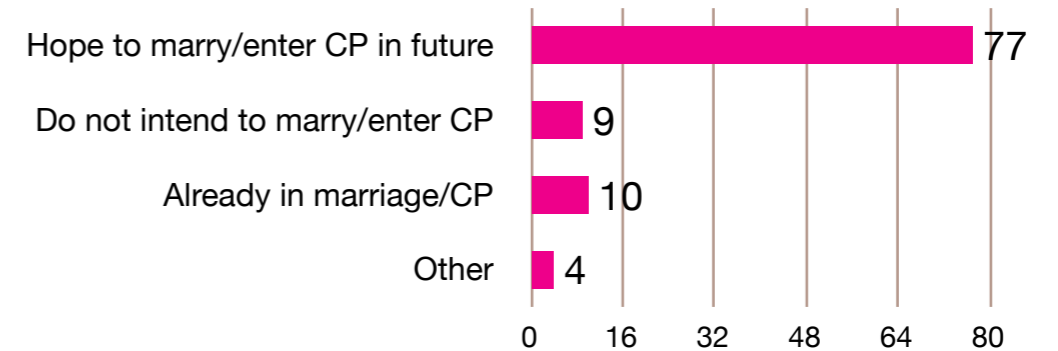
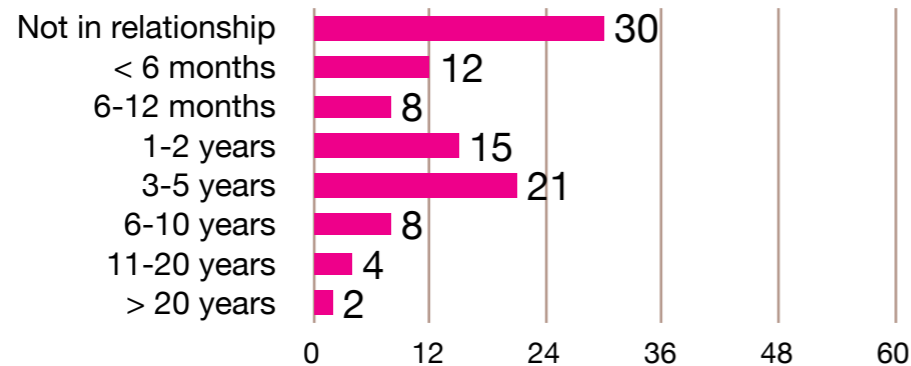
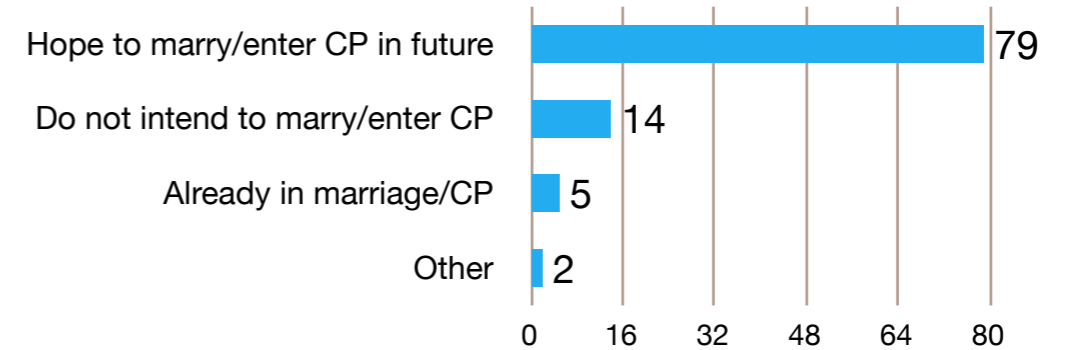
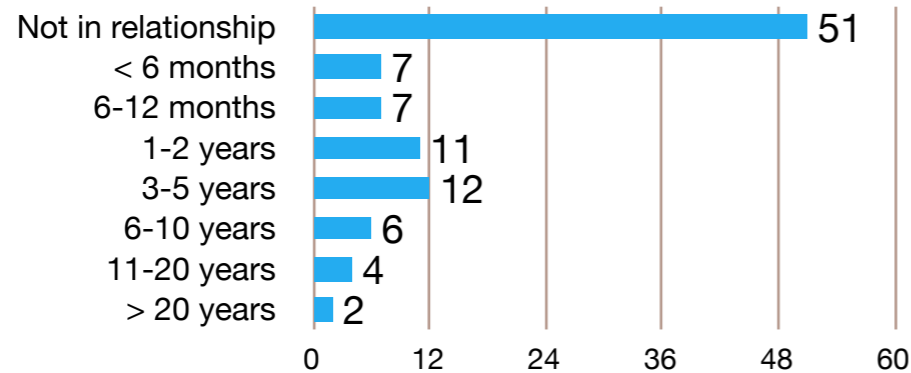
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Relationships and marriage

Total sample



Total sample



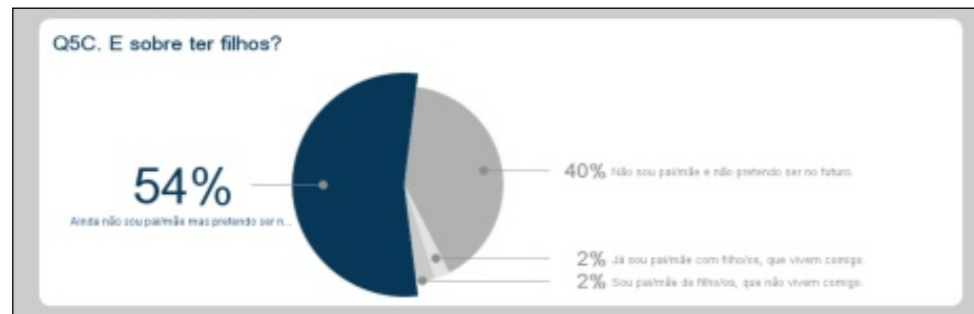
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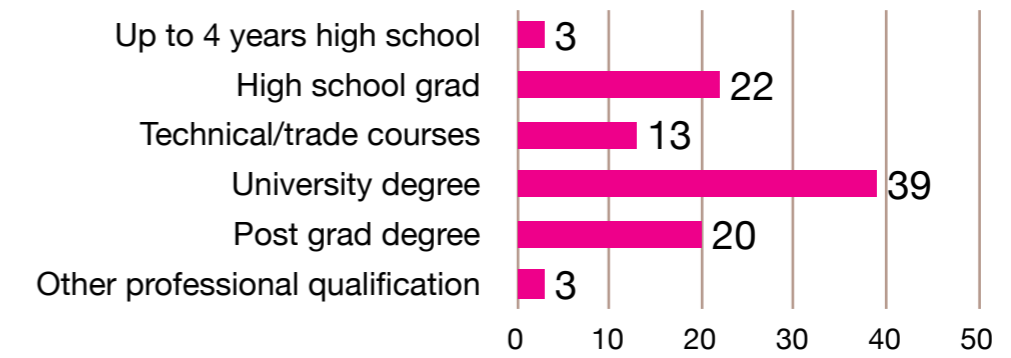
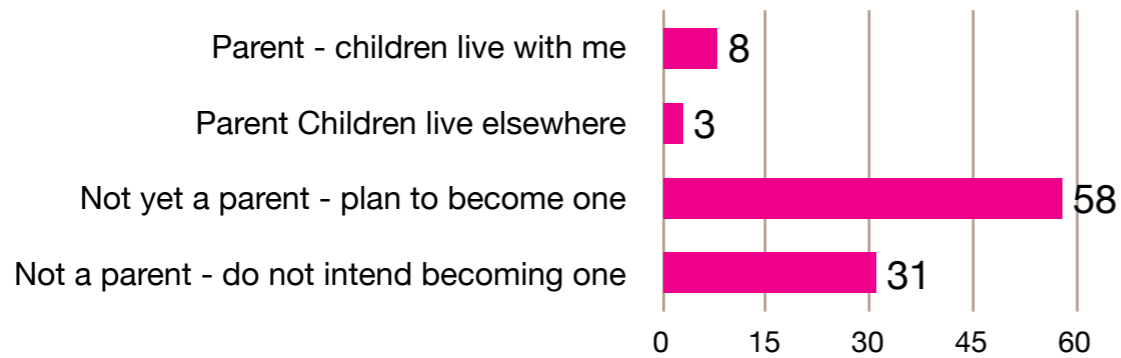
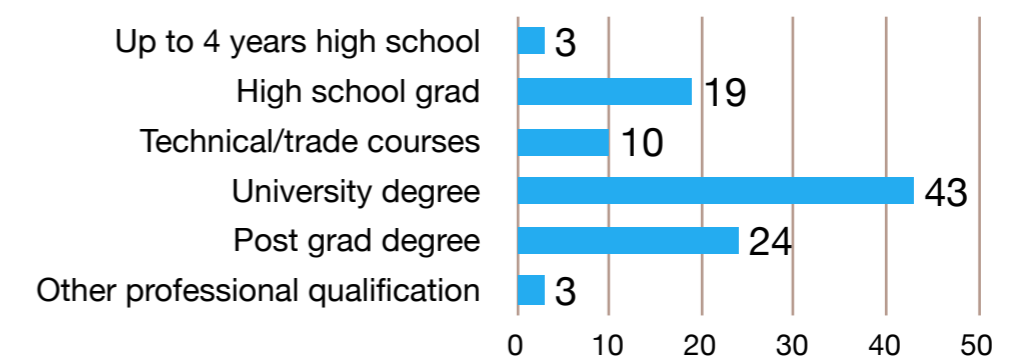
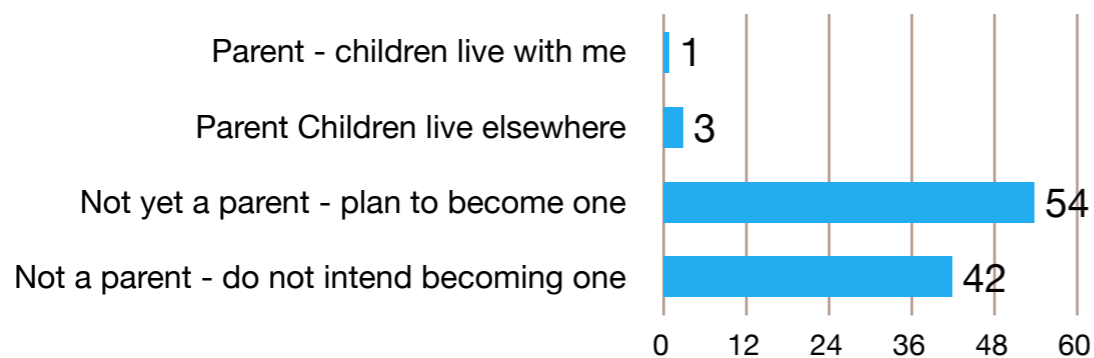
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Parenting and education

Total sample



Total sample



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Media usage

Total sample

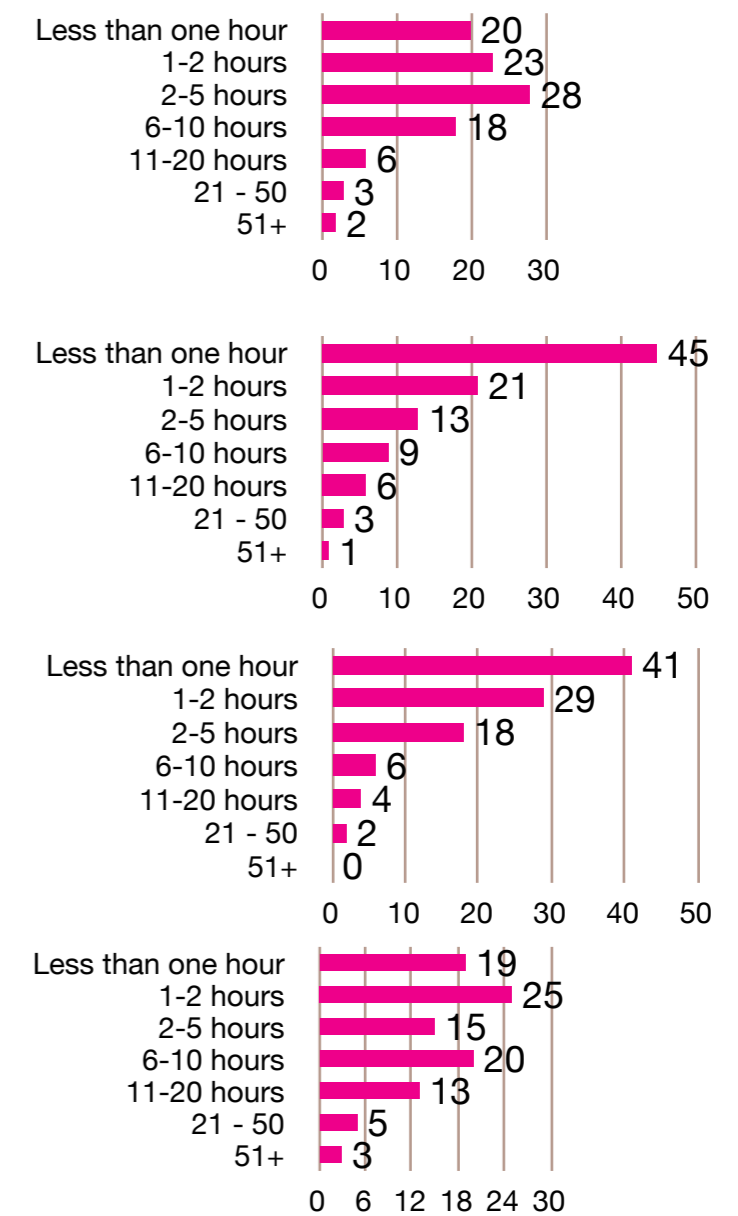
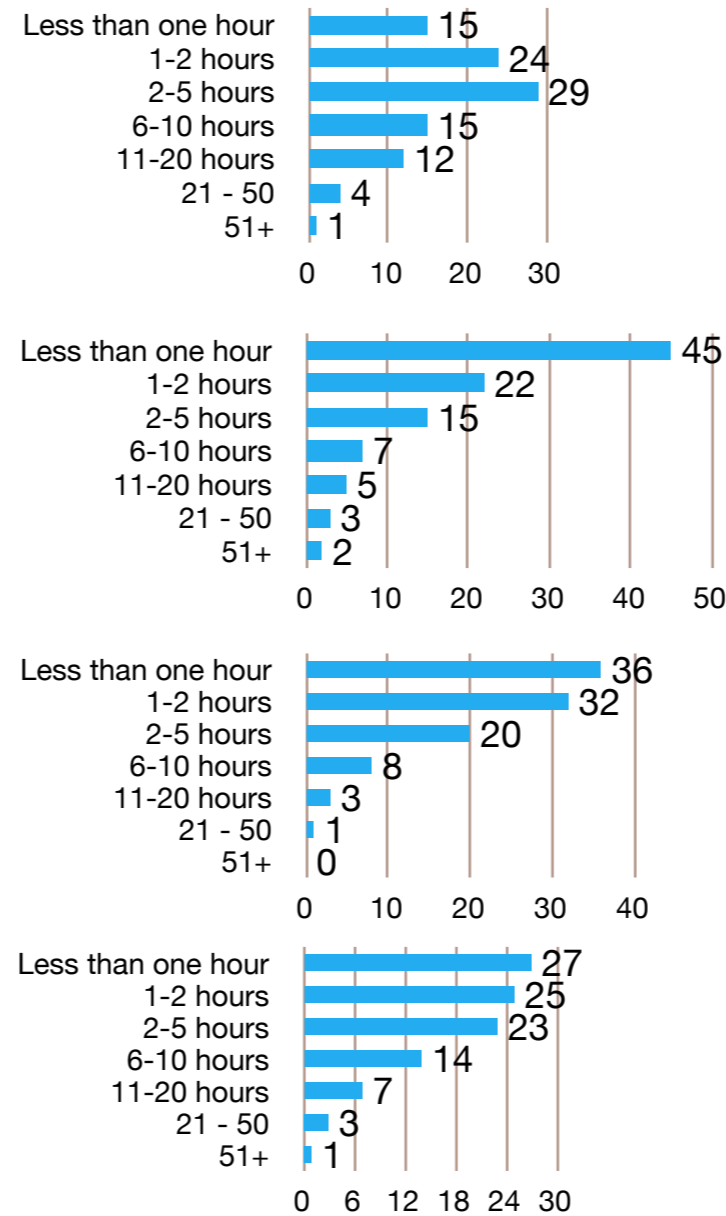
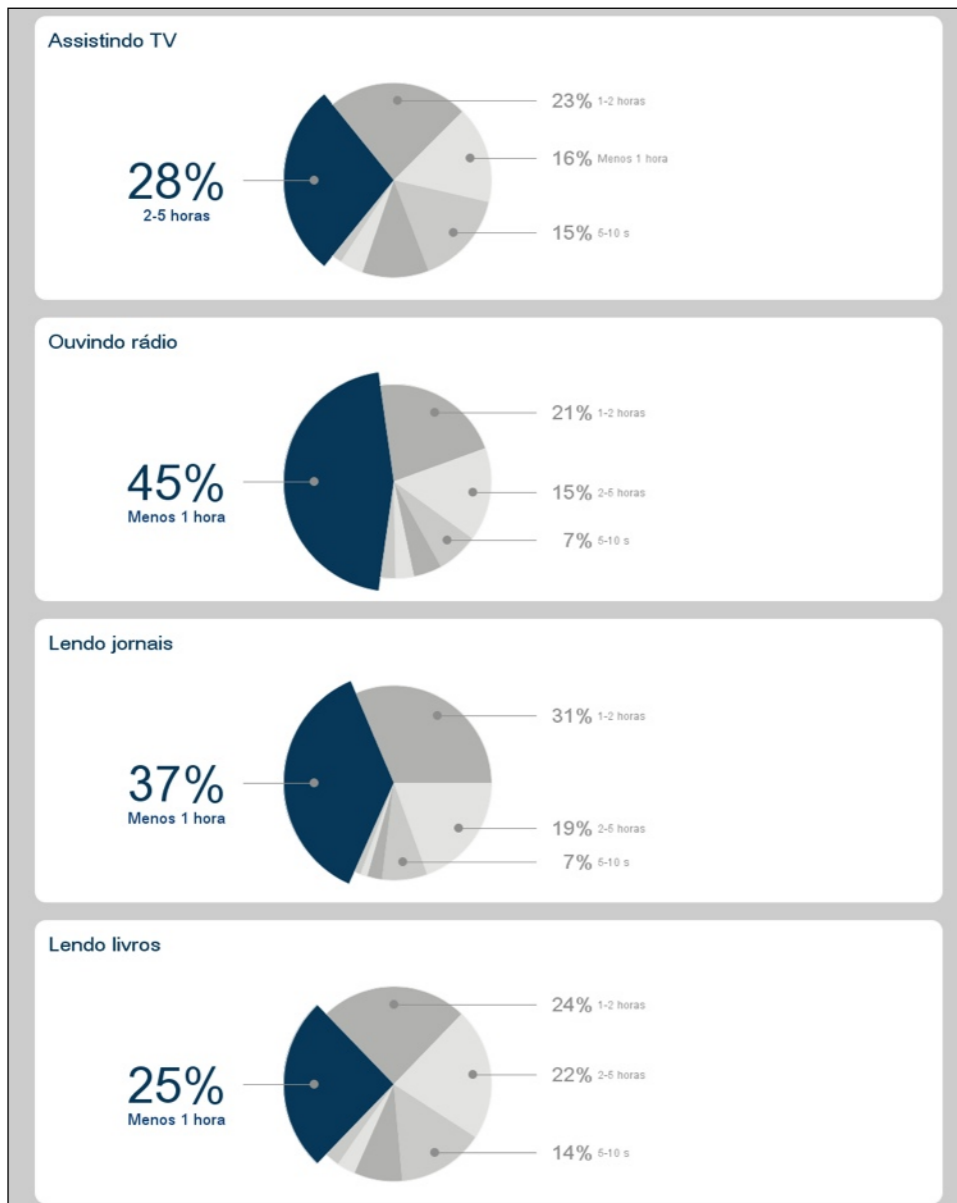
Q: Quantas horas por semana v. estima gastar usando cada um dos seguintes tipos de mídia?



Q: How many hours each week do you estimate that you use the following kinds of media?



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Media usage

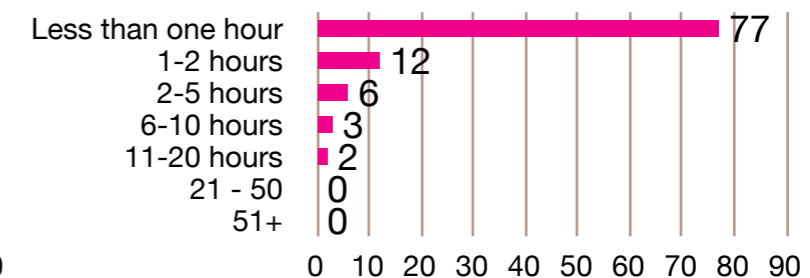
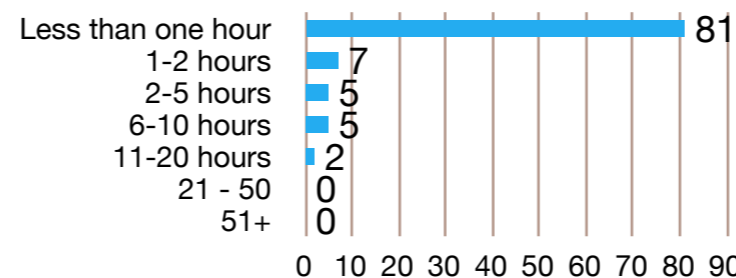
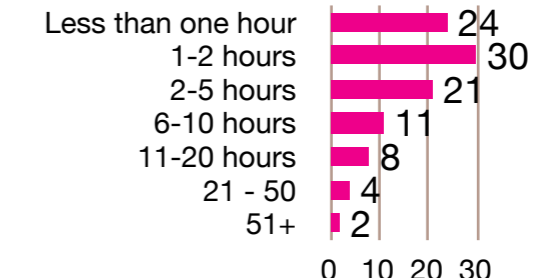
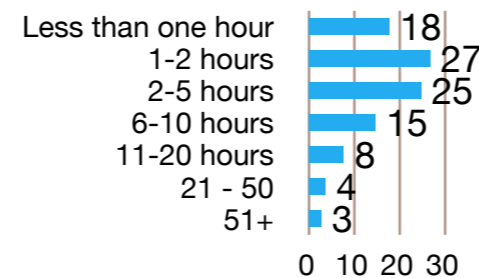
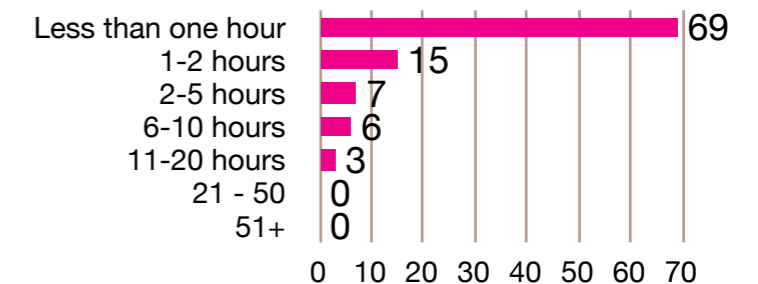
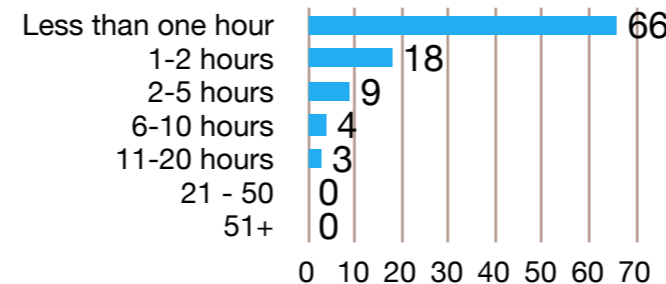
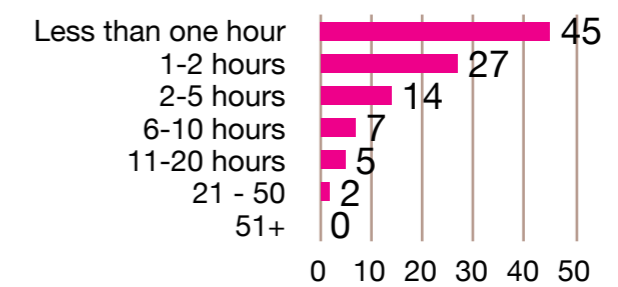
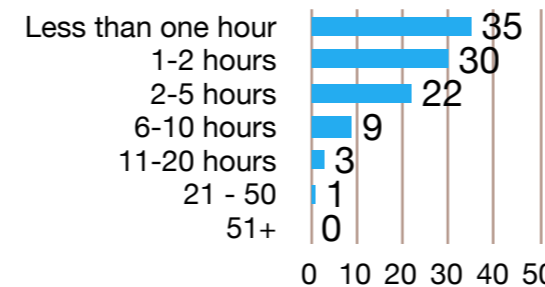
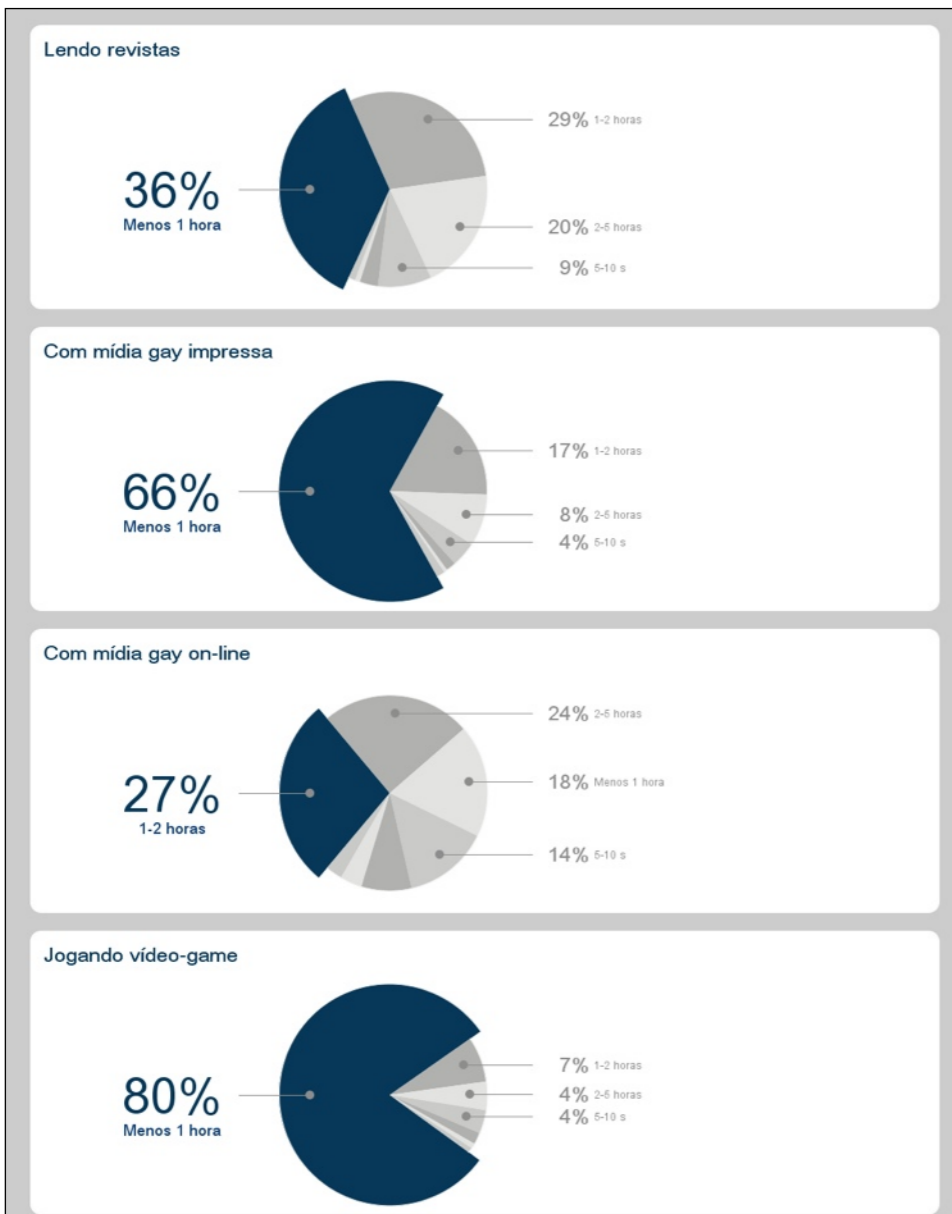
Total sample

Q: Quantas horas por semana v. estima gastar usando cada um dos seguintes tipos de mídia?

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Q: How many hours each week do you estimate that you use the following kinds of media?



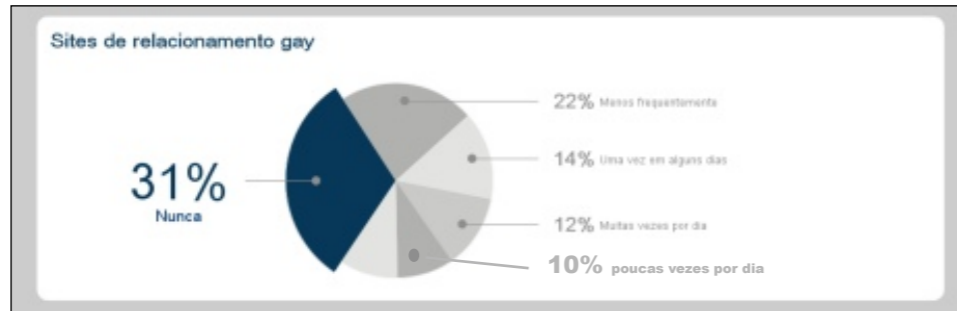
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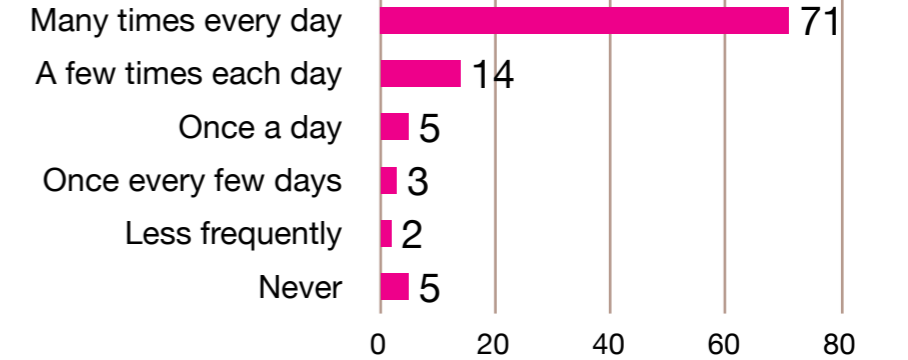
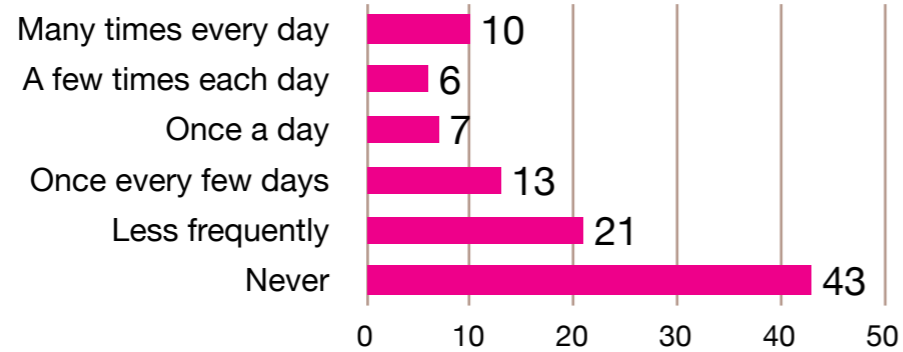
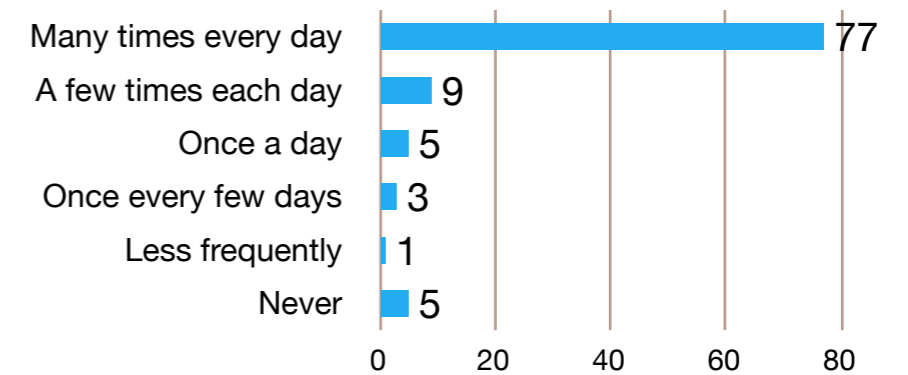
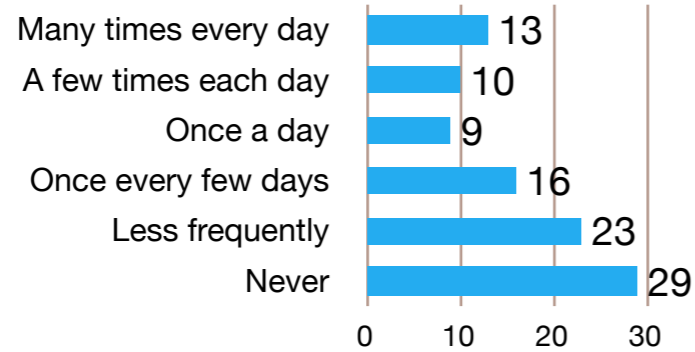
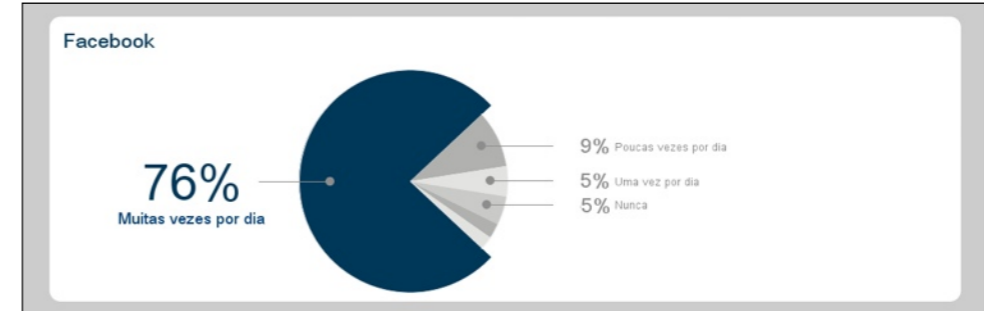
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Media usage

Total sample



Total sample



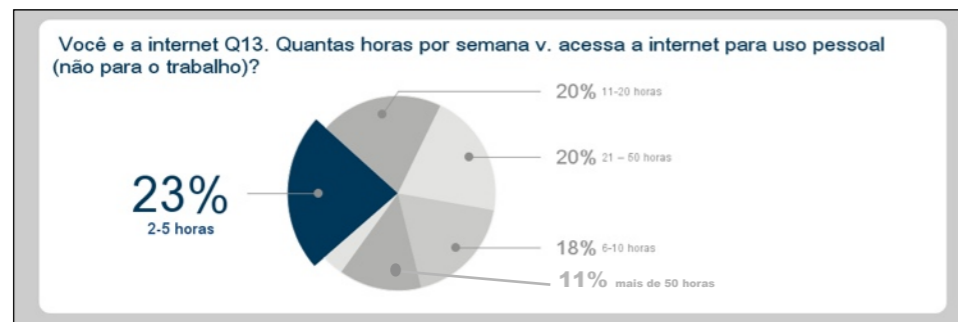
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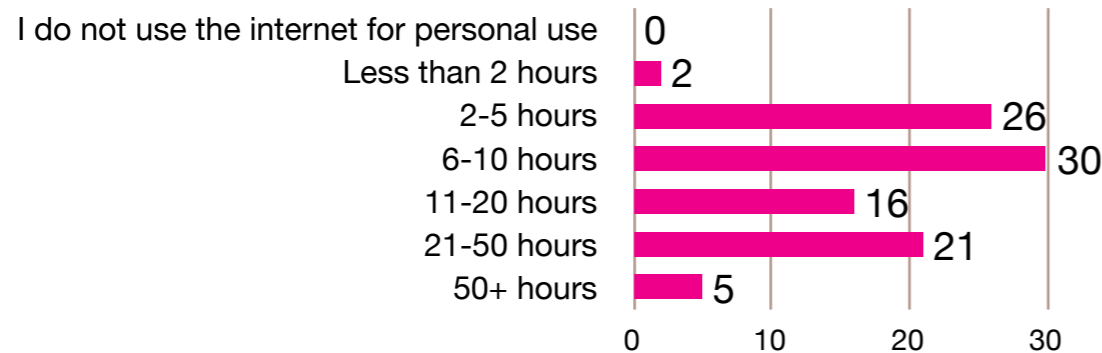
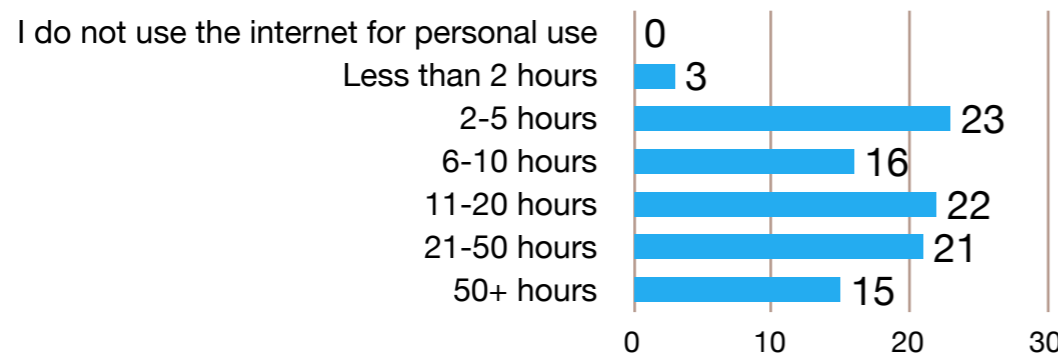
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Personal internet usage

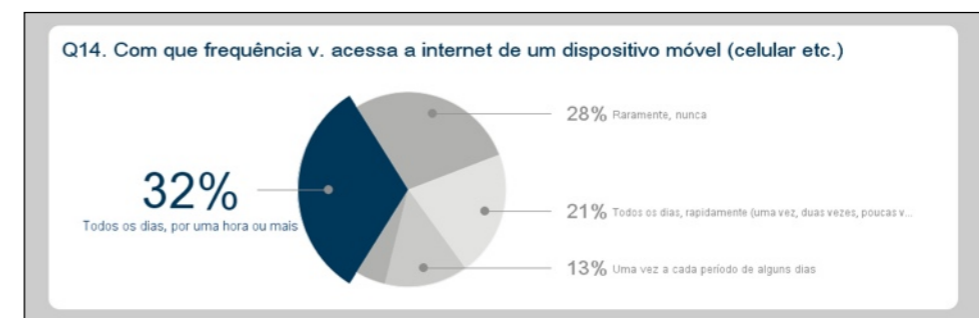
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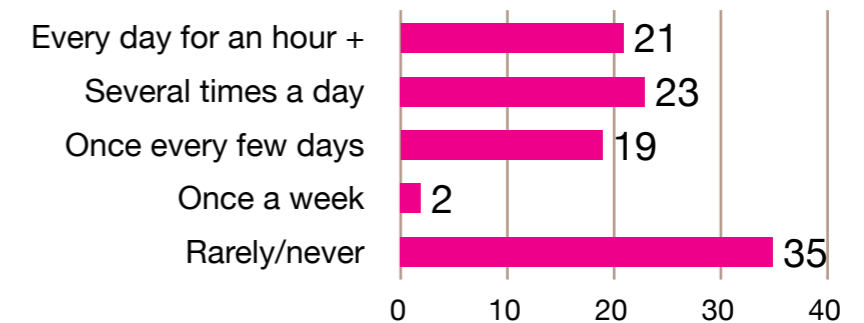
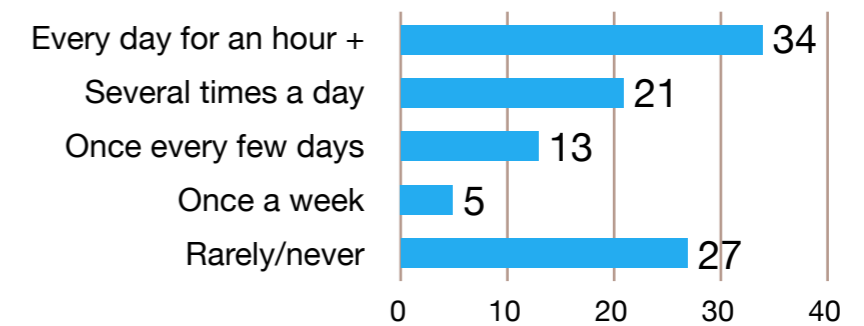
Q: How many hours do you use the internet for personal use?



Total sample



Q: How frequently do you access the internet from your phone, or mobile device?



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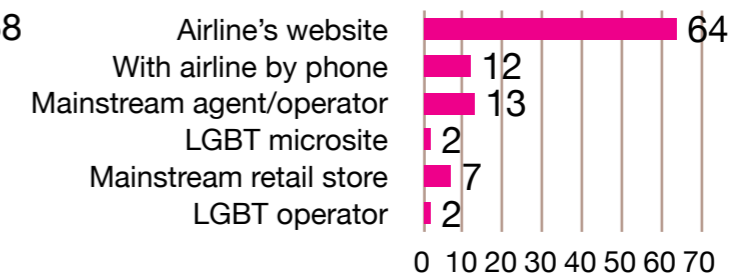
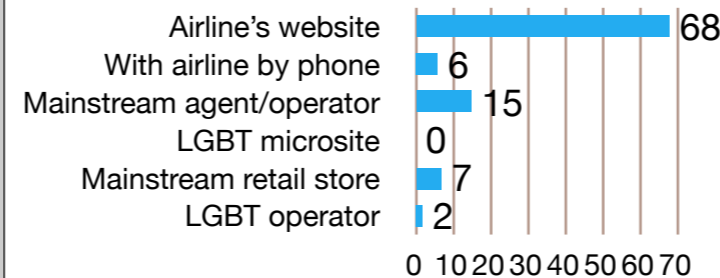
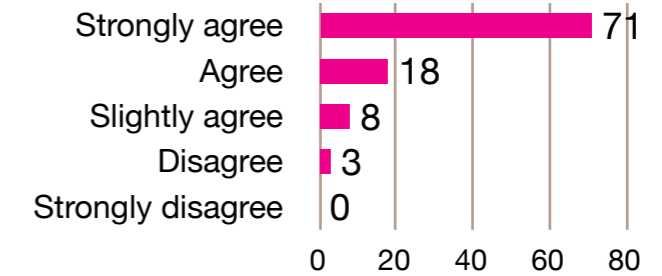
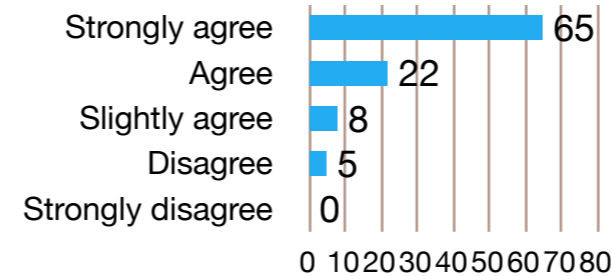
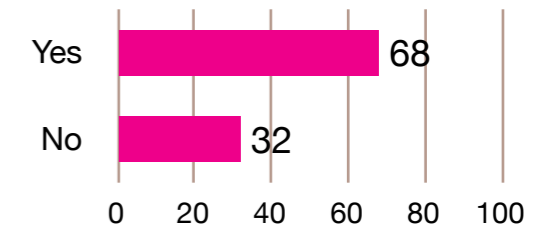
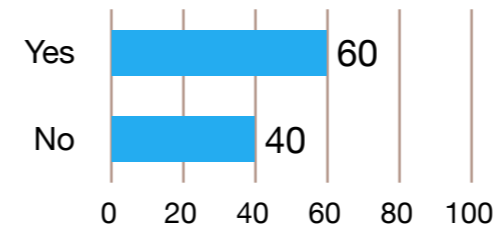
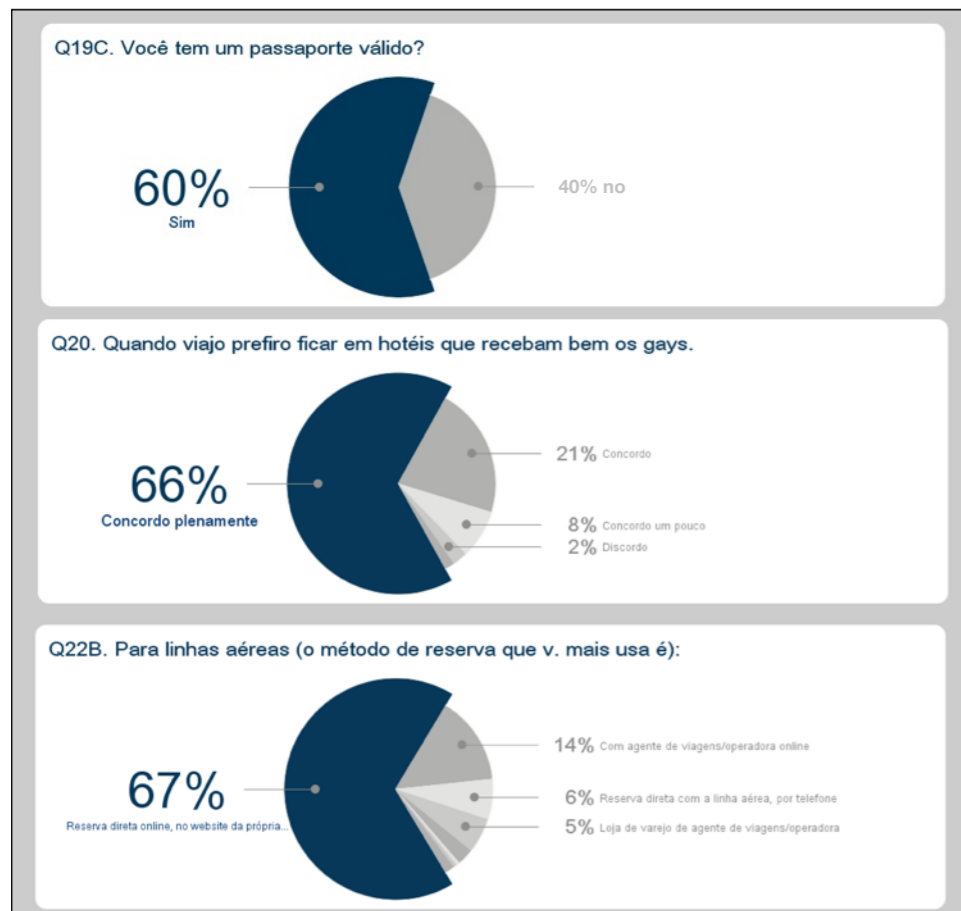
Travel booking trends

Total sample

- Q. Do you hold a valid passport?
- Q. When I travel I prefer to stay in hotels that I hope are gay welcoming?
- Q. For airlines the booking method that you choose most often is?



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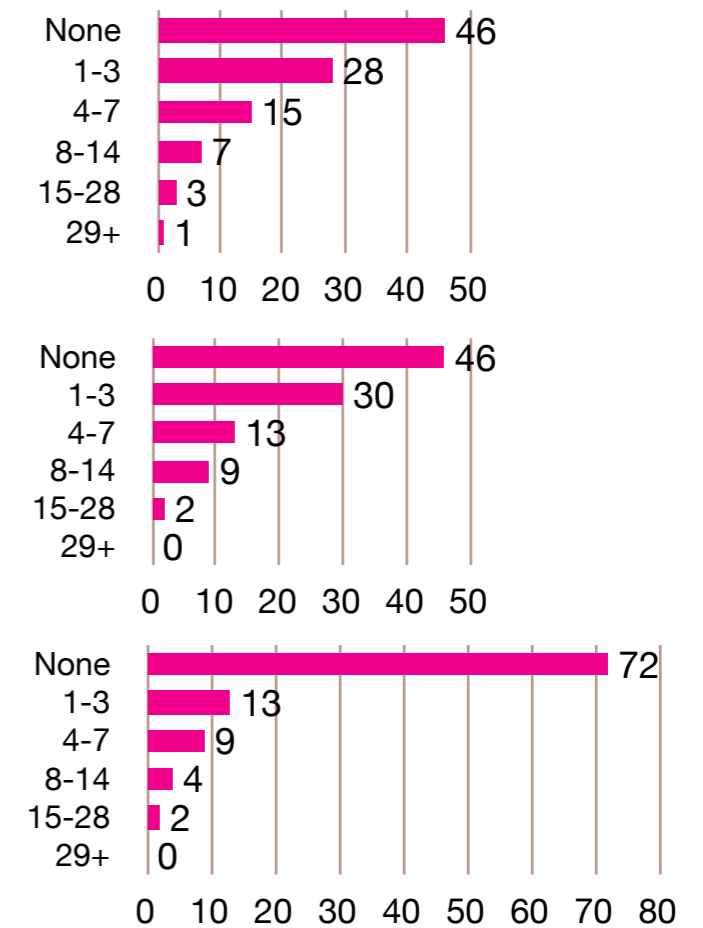
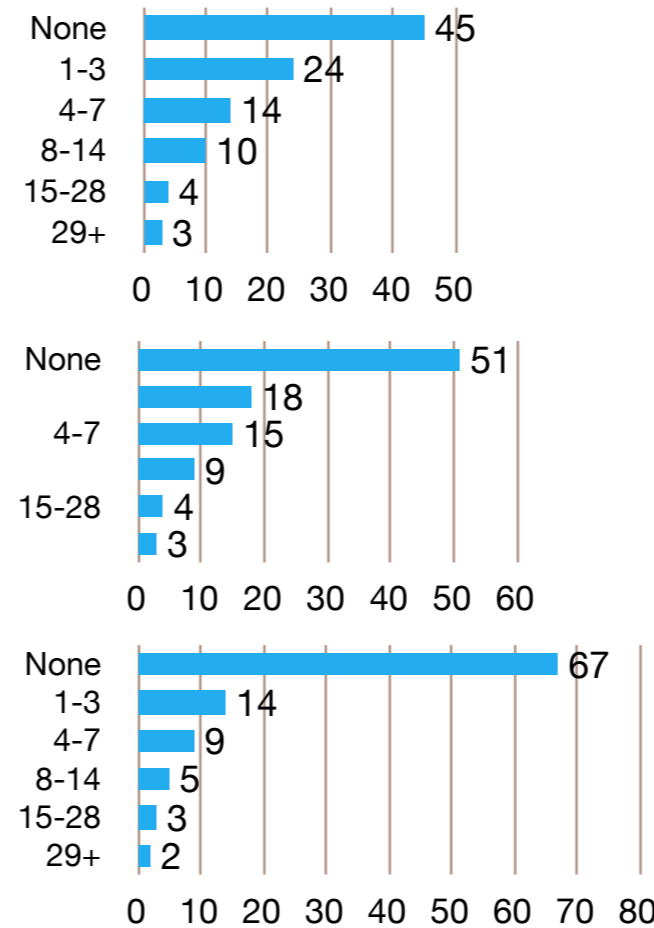
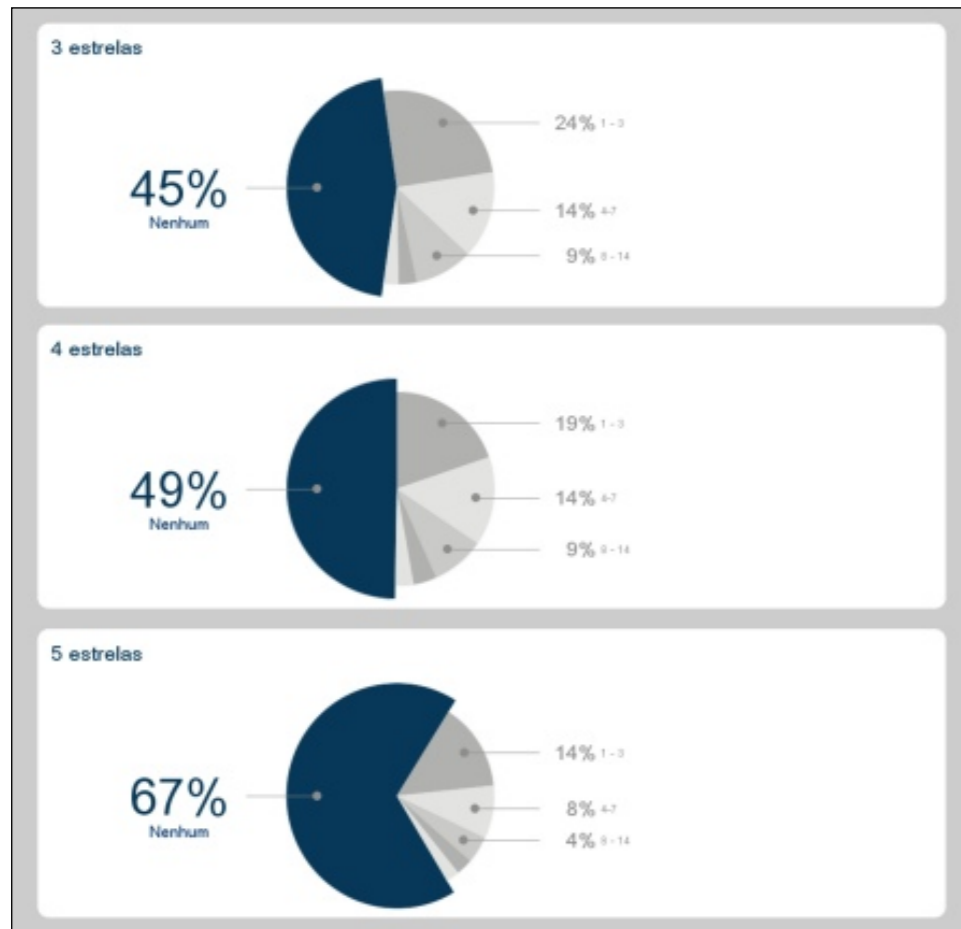
Hotel nights stayed

Total sample

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In the last 12 months, how many nights in total have you stayed in the following types of accommodation?



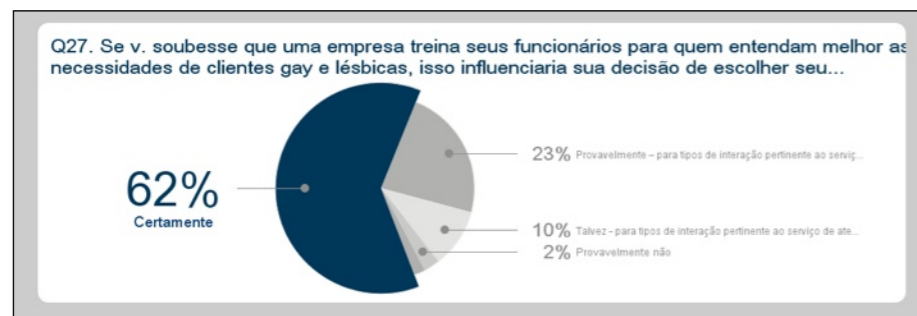
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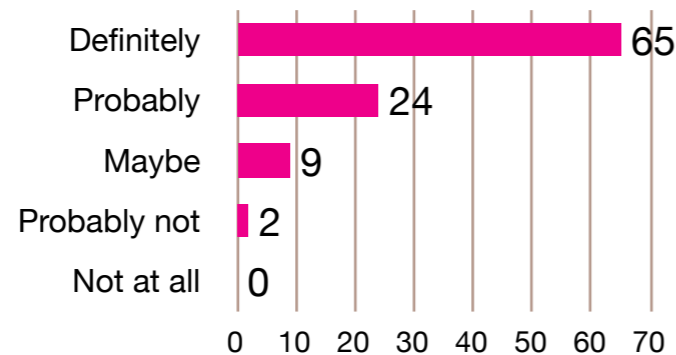
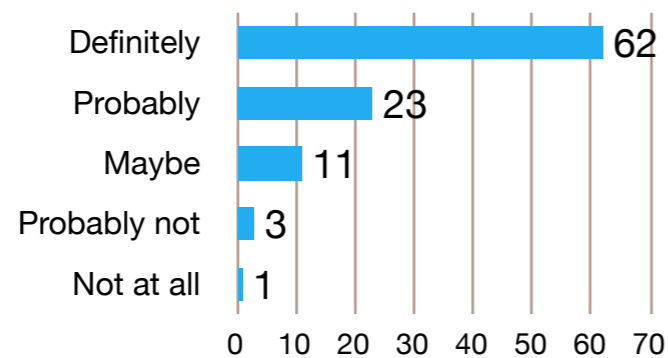
Importance of training and LGBT events

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Total sample



Q27. If you knew that a company trains their customer service staff on how to better understand the needs of gay and lesbian customers, would that affect your decision to consider choosing their products or services



LGBT2020 - BRAZIL - 2013

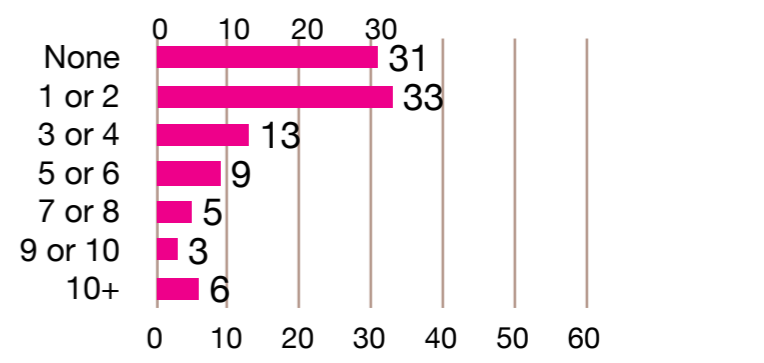
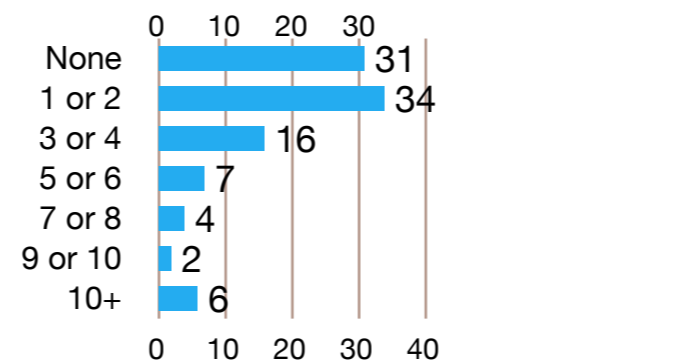
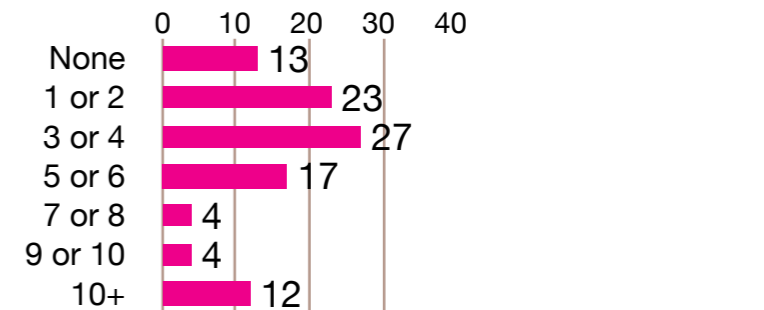
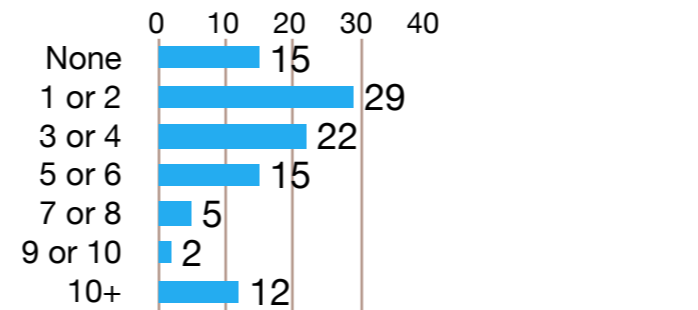
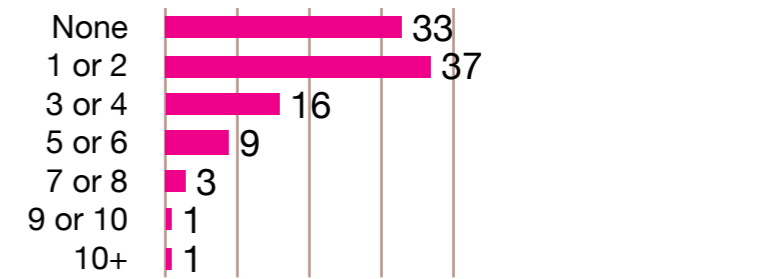
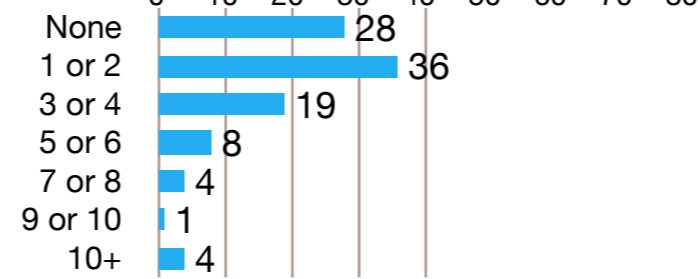
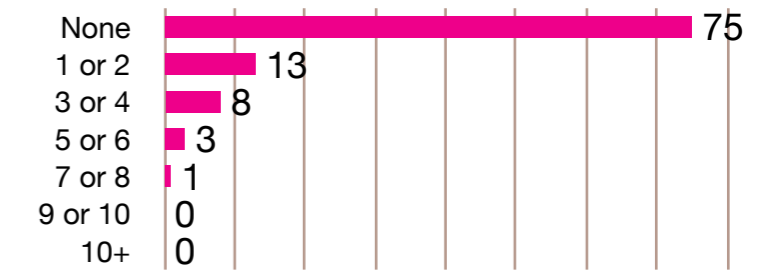
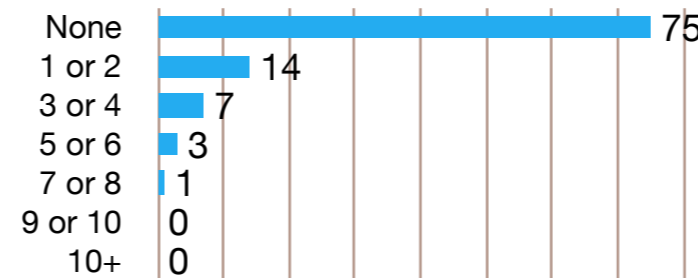
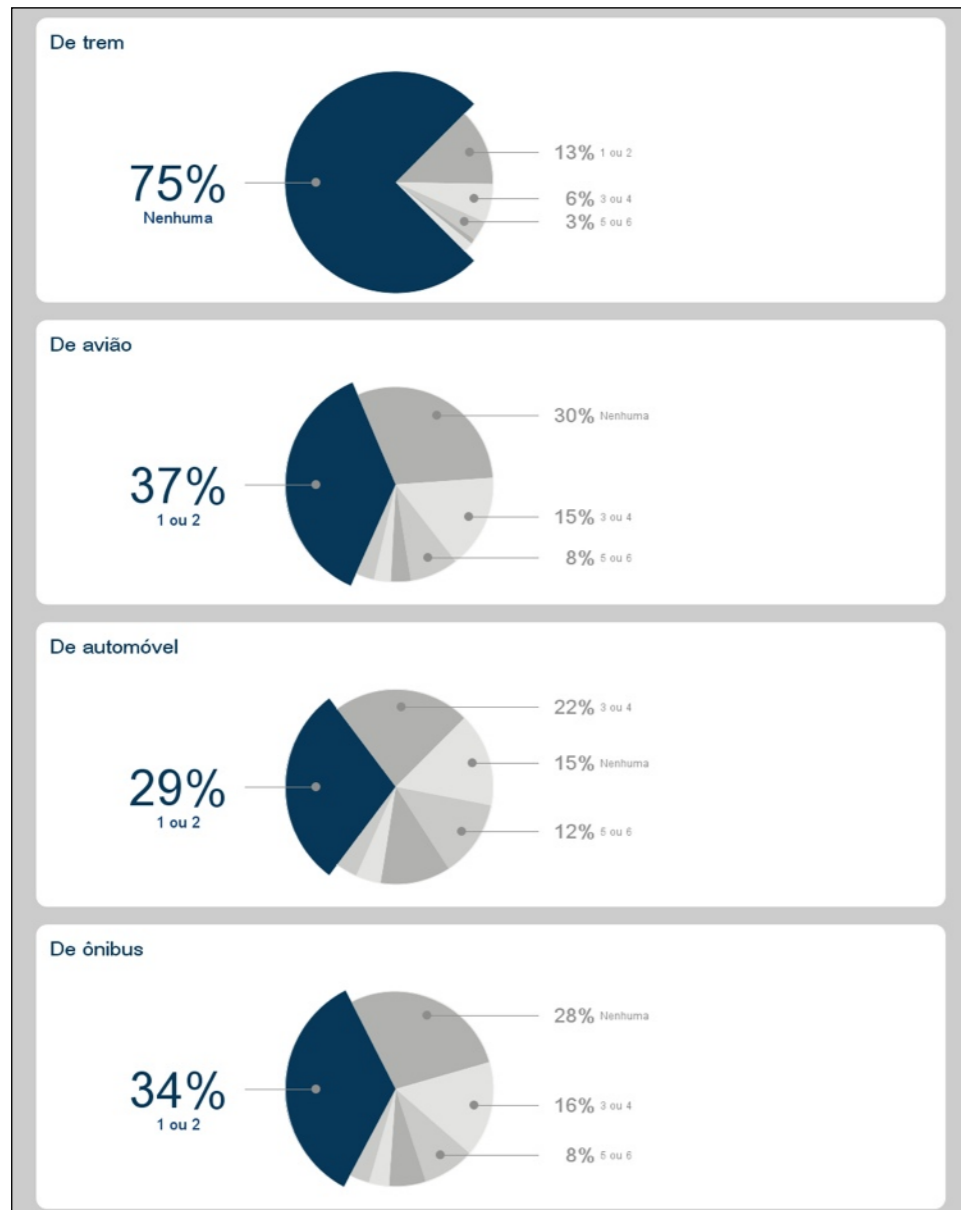


Leisure travel frequency Total sample

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In the last TWELVE months, indicate how many return journeys **FOR LEISURE** you have travelled between towns/cities using the following modes of transport:



LGBT2020 - BRAZIL - 2013



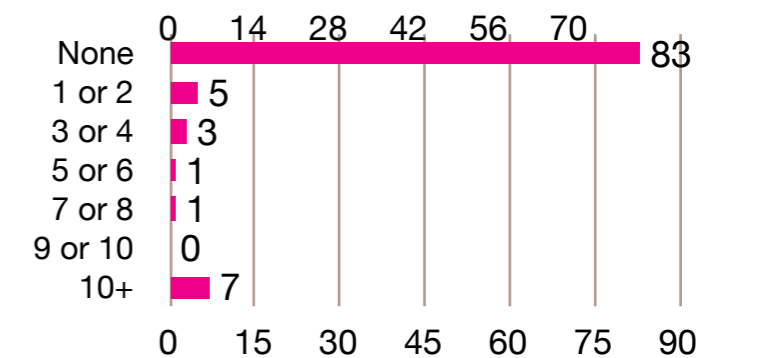
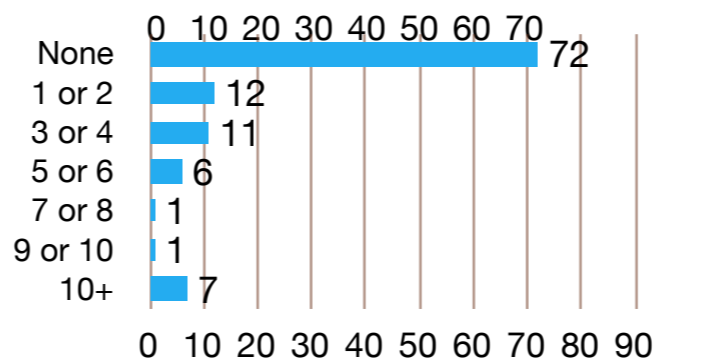
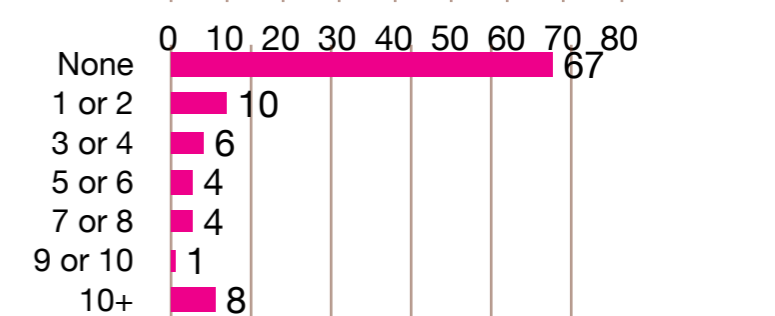
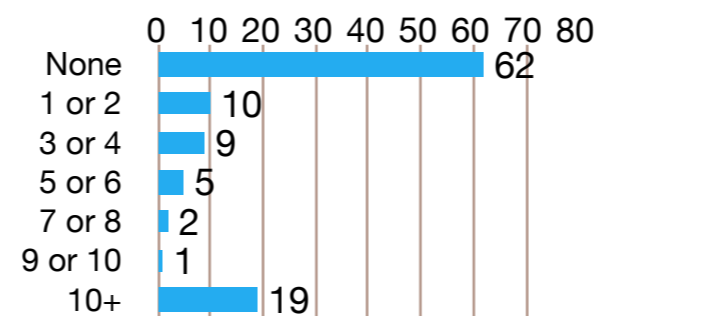
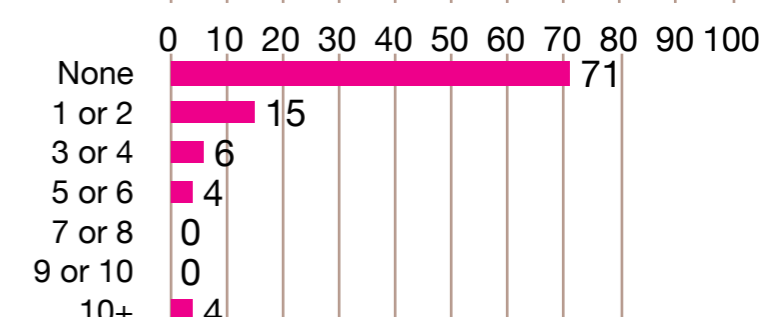
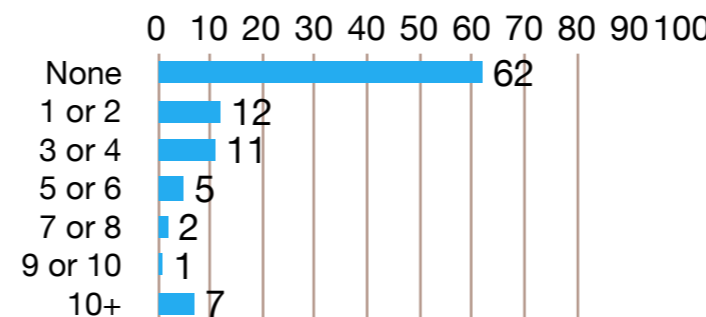
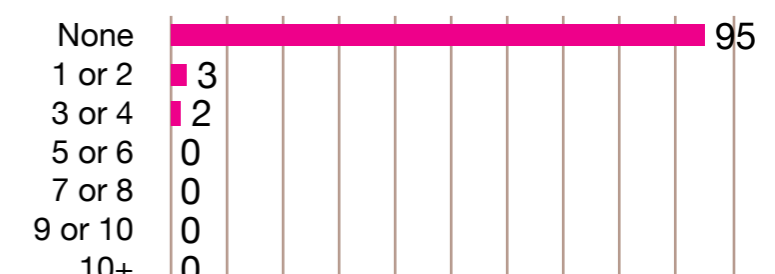
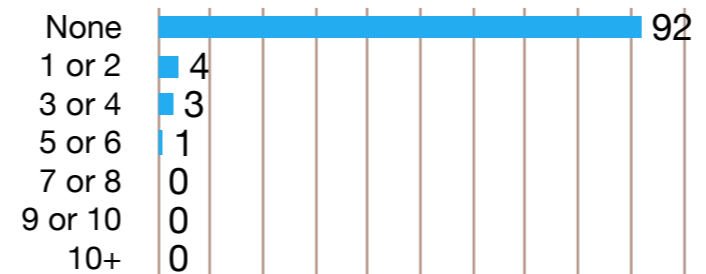
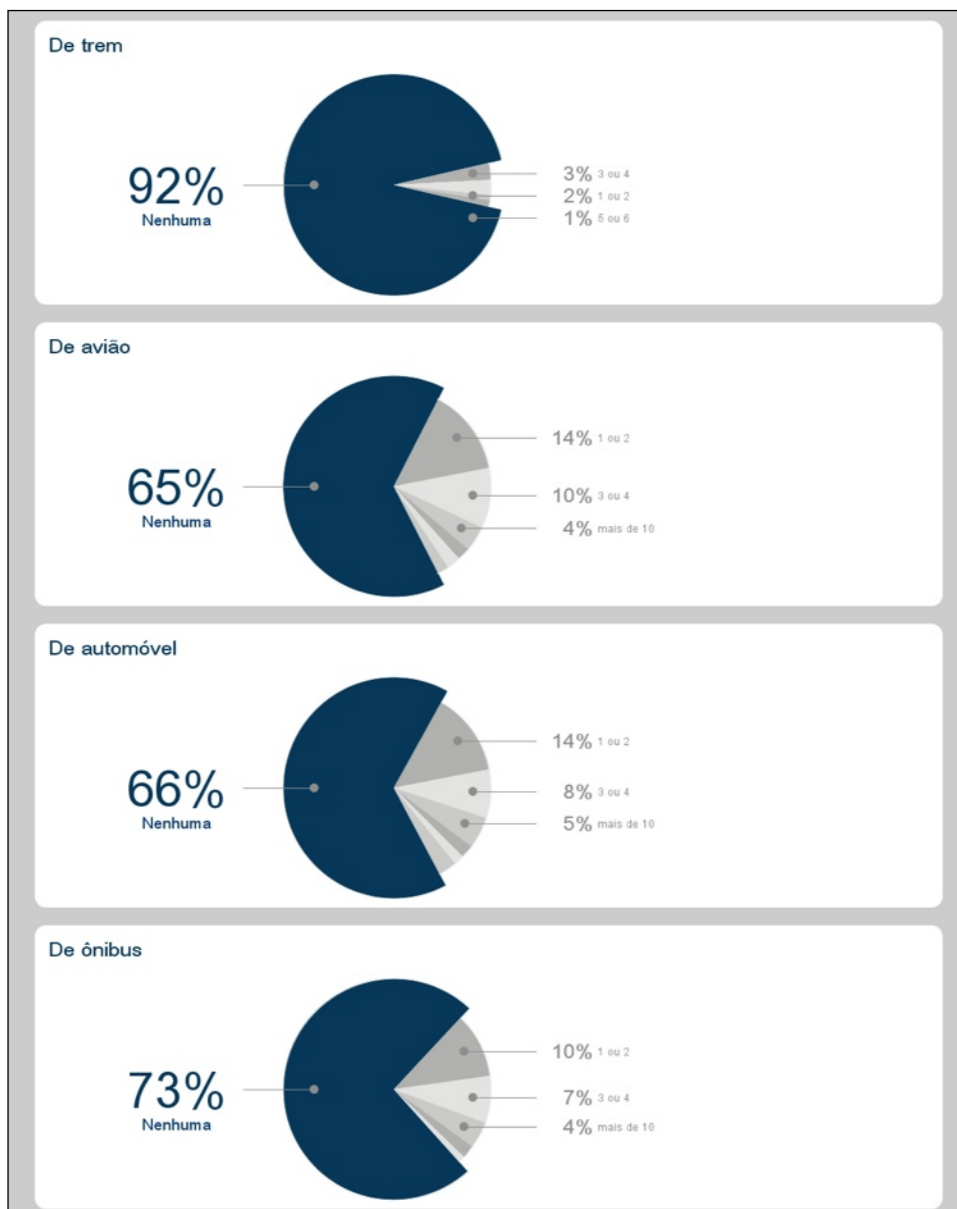
Business travel frequency

Total sample

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In the last TWELVE months, indicate how many return journeys **FOR BUSINESS** you have travelled between towns/cities using the following modes of transport:





LGBT2020 research data

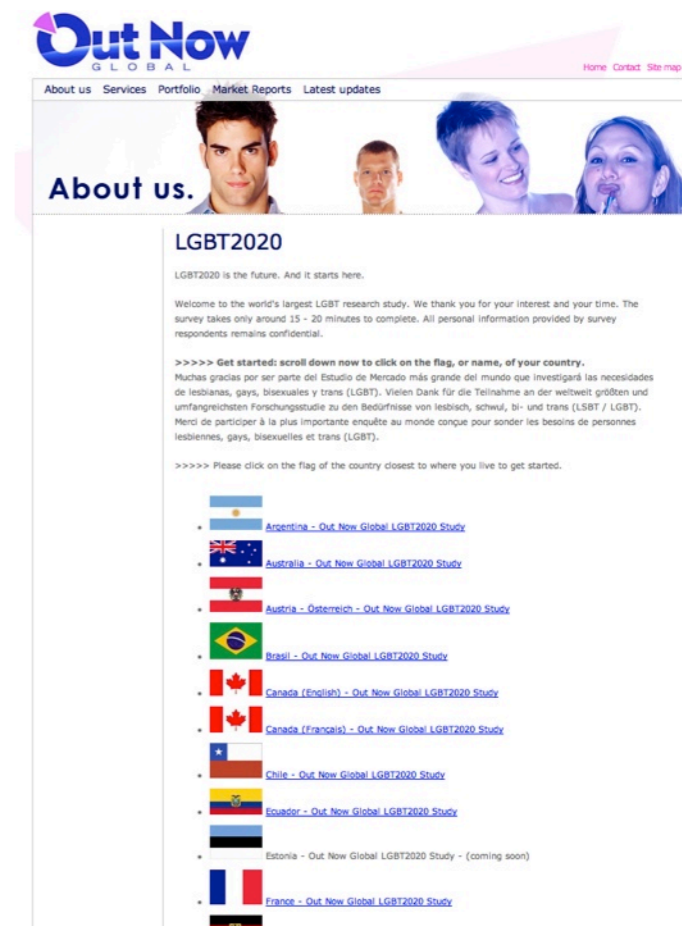
Better insights

World's largest LGBT market research ever

21 countries

12 languages

Your key to global leading-edge insights on your product.





Leadership

Industry presentations

We take your message with us to the best events globally.



Do better

Since 2007

The world's industry standard

Training is a key sales tactic

Meet the number one concern of LGBT travellers.





Travel agent training

Valuable channel

Too often overlooked in 2013

ONBC partnership with OTT

Database of more than 40,000 travel agents

ONBC builds specialist modules for your product

Travel agents make one in every three LGBT sales.





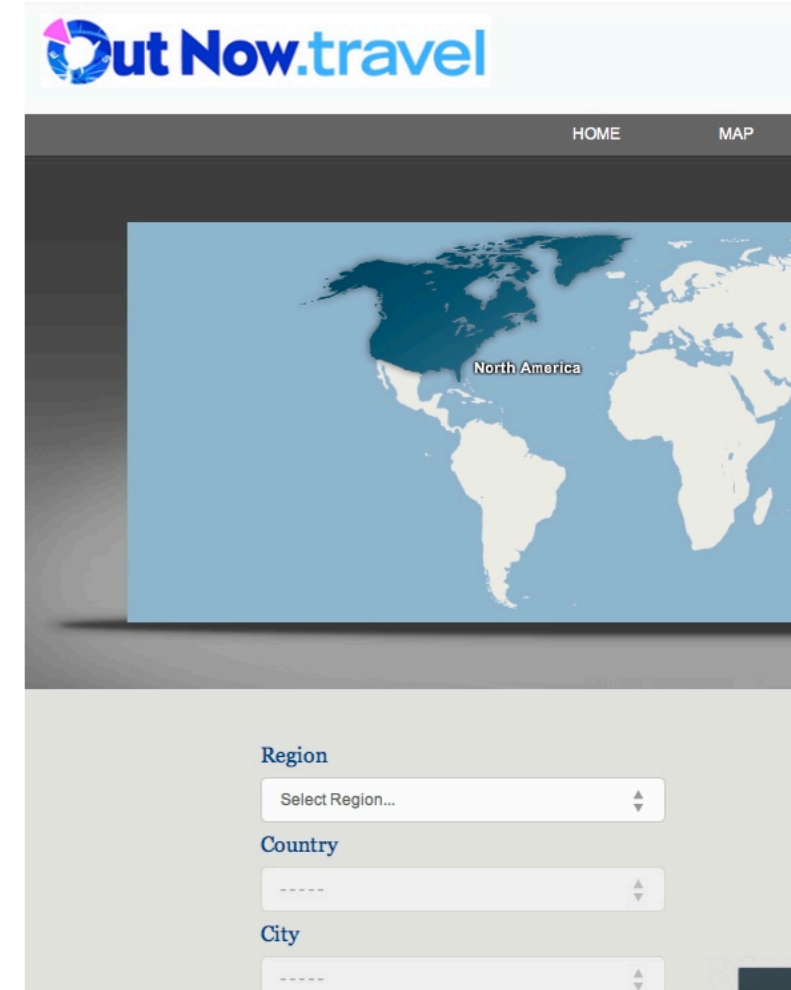
Credibility

Listings consumers can believe in

Certified OutNow.travel listings

Only site backed by power of ONBC training

Meet the number one concern of LGBT travellers.





Better LGBT

Train

Educate

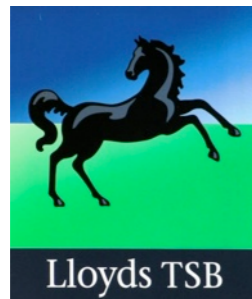
Network

Update

The world's best businesses connect with ONBC.



Some of Out Now's clients



The logo features a stylized 'O' on the left, filled with a blue digital pattern and a pink wedge-shaped cutout. To its right, the words 'out Now' are written in a bold, blue, sans-serif font. Below 'out Now', the words 'BUSINESS CLASS' are written in a smaller, black, all-caps, sans-serif font.

Out Now
BUSINESS CLASS

BetterLGBT.com