



Business Case for LGBT+ Inclusion



Executive Summary

The global travel and tourism industry has achieved consistent growth above the global gross domestic product (GDP). This global trend was expected to continue into the 2020s. Although the tourism industry in Canada has also achieved growth, it has not captured its full potential. When compared to countries like the United States and Australia, tourism is a small portion of Canada's total export volumes.¹ The Canadian government is supporting this potential growth through a new Federal Tourism Growth Strategy that is focused on expanding infrastructure and access, creating jobs and supporting tourism businesses.²

Canada is known globally to be a country that is more tolerant of people's differences and perspectives with laws that protect travellers and citizens from discrimination. For Canada's tourism industry to capitalize on its brand, there is a need to encourage more domestic and international tourists to visit and to try new establishments across Canada. By becoming more inclusive, the Canadian tourism industry would attract and retain new customers who are considering or may have been wary of trying new travel products and services.

Although the COVID-19 pandemic essentially stopped all travel around the world (including domestic), when the tourism industry is back to full business, the opportunity for increased growth will still remain. The Canadian tourism industry has the potential to increase revenues, profits and traveller volumes by attracting new customers year-round. An often overlooked group of travellers, which has steadily increased its leisure travel frequency and spending, is the LGBT+ community. This group's global travel and tourism spending is estimated at over US\$210 billion³ and in Canada US\$12 billion.⁴

Canada was ranked globally as the second safest country in the world for LGBT+ travel behind Sweden, which supports Canada's brand of being diverse.⁵ The Canadian LGBT+ community is resilient and ready to continue travelling. The community's travel spending has increased 54% since 2010, spending almost \$1,900 per trip, and members of the community plan to continue their domestic travelling as soon as possible for the remainder of 2020.⁴ When the LGBT+ community enjoys an experience with a product or service, they are loyal to it and share their experience with their community. To attract LGBT+ travellers as customers, products and services must provide inclusive experiences.

Inclusion ensures people feel that they can be themselves and are encouraged to do so without fear of discrimination, bodily harm or harassment. In order for LGBT+ travellers to consider travelling more within and across Canada, the Canadian tourism industry needs to ensure it implements an inclusion strategy that involves updating training, processes, policies and monitoring for all tourism employees, vendors and partners. LGBT+ travellers need to feel safe and valued before they will consider purchasing products or services.

After the COVID-19 pandemic, the travel and tourism industry will have a slower return to business compounded by the recession, which will impact the amount of discretionary spending travellers may have. But it is a perfect time to begin the journey of implementing an inclusion strategy and encouraging LGBT+ travellers to use products and services in order to support Canadian growth potential.

The Opportunity

Missing Growth Potential

Before the COVID-19 pandemic, the world's tourism sector was achieving consecutive years of growth with increases exceeding the global gross domestic product (GDP) rates.⁶ In Canada, the number of visitors and their spending also increased. Although Canada achieved or exceeded global GDP growth over the past few years, other countries have done better.¹ As a contributor to Canada's total exports, Canadian tourism also represents a smaller portion when compared to other countries like Australia and the United States.¹ Part of the reason for the gap in potential is in the lack of infrastructure for land and air travel.⁷ Based on Canada's gap in growth, in 2019 the federal government recognized tourism as a high priority growth industry and committed to supporting it through budgeted initiatives, such as improving infrastructure and access, building the workforce and tourism business strategies.²

COVID-19 Impact

The COVID-19 pandemic has negatively impacted the global tourism industry through worldwide closures and/or reduced services. Specifically, in Canada the tourism industry lost over 881,000 jobs² within the first month of closures and is projected to lose millions of dollars in revenues through the remainder of the year from domestic and international travel restrictions. The estimate is that it will take another two to three years to achieve 2019 levels.⁸

Diverse but Not Inclusive

With the original growth opportunities now complicated by a projected slow recovery and recession, Canada's tourism industry is now in a position to focus on readiness and improvements to maximize its growth potential. There is a great opportunity to begin working toward attracting new and welcoming returning travellers. Canada is known for its diversity, which is attractive, but it doesn't embolden all travellers to feel welcome to experience the entire country free of harassment, stereotypes, invisibility or judgment. In order to attract and capitalize on increased visitors to Canada, Canada's tourism sector needs to become more inclusive.

A recent study has shown that Canadian LGBT+ travellers spend up to 33% more than the average Canadian per year⁹ and are already looking forward to resuming travel plans domestically. Globally, as countries begin to reopen businesses and borders, more LGBT+ travellers will also begin preparing for their next travel adventure.

In order to attract a broader travel clientele, the tourism sector will need to implement year-round inclusive products and services that entice LGBT+ travellers both domestically and internationally. It is important for Canadian businesses and communities to understand the benefits, risks and requirements of inclusion in order to implement effective strategies; this includes training and infrastructure updates to accommodate and support LGBT+ inclusive travel across Canada. It is also essential to understand and be aware of special LGBT+ traveller considerations in order to implement them throughout businesses and communities.

Reflect Changing Demographics and Market

As the population ages, millennials are the fastest growing travel demographic, and they have different expectations around diversity and inclusion. They are the largest and most diverse generation to date, with over 52% of North American millennials being non-white.¹⁰ They expect, appreciate and are more tolerant of diverse experiences¹¹ and will soon be 75% of the workforce.¹² Recent polls suggest that there is a rise in LGBT+ identification and that almost 20% of U.S. millennials identify as LGBT+, and that percentage is believed to be higher for Generation Z.¹³ Millennials are also becoming an increasing proportion of LGBT+ travel guests who look for unique and special experiences to take home.¹⁴ Therefore, in order to remain competitive and to take advantage of growth potential, businesses need to reflect the changing market profile and expectations of younger customers and employees for inclusive services and products.

The Solution

The Benefits of Diversity & Inclusion

Known for its diversity, Canada is a great place to visit and experience a variety of people, foods, languages and cultures from around the world. The solution to capitalizing on the growth potential for the Canadian tourism industry is to build upon the diversity we are known for by adding inclusive products and services that enable LGBT+ travellers to feel welcomed and accepted. However, offering diverse products and services without ensuring they are inclusive will not be sufficient to entice LGBT+ travellers. For diversity to be impactful and sustained, it requires inclusion. Inclusion for LGBT+ travellers means they are provided with a sense of belonging and acknowledged for their diversity, plus they feel safe to be themselves and are welcomed and encouraged to participate in travel products and services. To show authenticity, tourism businesses need to demonstrate inclusion both internally (having diverse employees, policies, processes, etc.) and externally (customer facing products and services).

Besides being the right thing to do, inclusion is also important to foster a work environment that drives innovation and creativity, which directly impacts key business performance metrics. It is also important that a workforce reflects its travel customers so that it better understands the needs of, and how to connect and engage with, current and new travel customers. The financial benefits of inclusion have already been well documented ([McKinsey](#), [PwC](#), [Deloitte](#), [BCG](#), [Josh Bersin](#), [Harvard Business Review](#) and many other studies) to prove that inclusive organizations attract and retain top talent, have increased revenues and profits, have improved company branding, have higher employee engagement, provide competitive advantages and lead to attaining new markets and customers. It is also important to know that consumers who are allies are more likely to purchase goods and services from companies that support the LGBT+ community.¹⁵

Include LGBT+ for Faster Recovery and Growth

Prior to the COVID-19 pandemic, the global LGBT+ travel market was worth over US\$210 billion in annual spending on travel and tourism, which is estimated to be approximately 10% of global tourist spending.³ Canadian LGBT+ travellers spend over \$12 billion on tourism per year.⁴ The average spending has increased over the last 10 years by 54%, to about \$1,850 from about \$1,200, used toward travel, accommodations and leisure activities.⁴ Based on this data, the Canadian tourism industry could begin to grow revenues and profits by attracting LGBT+ travellers to products and services.

LGBT+ travellers enjoy travelling frequently, spend more than the average travellers⁹ and become dedicated customers when they enjoy travel experiences. On average, Canadian LGBT+ travellers take at least two vacations and several leisure trips per year, and those over 40 years of age take at least three per year. Over 30% of LGBT+ travellers have increased the number of leisure trips they took from 2018 to 2019.⁴ Along with these increases, LGBT+ travellers are loyal and will frequent products and services after good experiences. If the Canadian tourism industry can capitalize on all of these great attributes, LGBT+ travellers will support growth potential.



Requirements for LGBT+ Travellers

LGBT+ Inclusion

To capitalize on attracting and retaining LGBT+ travellers, Canadian travel and tourism companies must become more inclusive. Inclusion means all travellers, regardless of sexual orientation and expression, race, gender identity, ethnicity, physical abilities, culture, family status, age, social status and similar attributes that make people diverse, are all welcome to participate in products and/or services without harassment or discrimination. LGBT+ travellers are already a diverse group of travellers with a range of ages, genders, races, abilities, interests and much more. For LGBT+ travellers to consider Canadian products and services, it must be clear that they will be accepted as they are and any personal requirements have been addressed.¹⁶

Inclusion also means the LGBT+ community is reflected year-round in media and advertising, such as images on commercials as well as inclusive language and ensuring all are void of negative stereotypes. Inclusion leads to attracting and retaining LGBT+ employees, which reflects an organization's true ability to understand and support the LGBT+ community.

Safety

LGBT+ travellers' most important concern is physical and mental safety.¹⁷ Being safe from social discrimination while interacting with people, products and locations is critical when deciding what products and services will be used. An LGBT+ traveller considers safety during interactions with service employees and products, while using facilities and accommodations and in language with media communications. Over 75 countries in the world still criminalize LGBT+ relationships in some form,¹⁵ which forces citizens to travel outside of their homeland for leisure and vacation time. Although protected by Canadian laws,¹⁸ there is still the need to ensure that no physical harm or harassment would be directed toward any LGBT+ traveller.

As a result of these concerns, LGBT+ travellers rely heavily upon recommendations from family and friends, LGBT+-friendly blogs and forums,⁴ Government of Canada website information and LGBT+ traveller ratings to avoid potentially dangerous situations and harassment.¹⁹ Therefore, Canadian tourism companies will need to display and consistently demonstrate how they will provide safe and secure products and services for LGBT+ travellers and employees.

Demonstrating safety will require using supporting language, displaying the Pride flag and deploying marketing and advertising that includes gender-neutral language references and images that are reflective of the LGBT+ community. Having a working environment where LGBT+ employees are welcomed and thriving shows LGBT+ travellers that the organization understands and provides safe products and services for everyone.

Travel Costs

With the increase of millennial LGBT+ travellers who have less disposable income today, it is important Canadian tourism companies have more options for frugal inclusive travel.⁴ Especially coming out of pandemics such as COVID-19, cheaper options will encourage more LGBT+ travellers who are looking forward to returning to their travel plans and may consider trying new products and services.

Reviews and Ratings

As previously noted, for LGBT+ travellers to consider products and services, they rely on company brand reviews and ratings from friends and LGBT+ travel groups, blogs and websites. It will be crucial to ensure inclusive standards are maintained in order to improve and sustain positive reviews and ratings. Reviews will need to be monitored (social media, websites, print media), and issues or concerns will need to be addressed immediately to avoid losing LGBT+ travel support and trust.

Belonging

A steadily increasing number of organizations are demonstrating their desire to attract and support the LGBT+ community as their customers. These businesses are successfully targeting and attracting LGBT+ travellers year-round through event sponsorship and advertising on LGBT+ social media, LGBT+ travel podcasts, blogs and tourism websites. Companies are benefiting from improved brand recognition and overall profitability when they acquire LGBT+ customers. For example, the car manufacturing company Subaru improved its struggling sales by specifically advertising to the LGBT+ community with ad captions such as "It's Not a Choice. It's the Way We're Built" and partnering with openly gay athletes.²⁰ LGBT+ travellers need to feel genuinely acknowledged and welcomed by showing them support through direct communicating and advertising.



The Risks

Settling for Business as Usual

There are both qualitative and quantitative risks to not implementing more inclusive practices for travel products and services. If nothing is changed, once the tourism sector returns to pre-COVID-19 revenues and travelling volumes, it is probable that growth potential gaps will continue to exist. There is also a risk to companies' brands becoming tarnished by not reflecting the changing demographics of domestic and global travel markets as part of their clientele (and employees). This in turn would negatively impact previous growth achieved and future growth potential, especially with millennials who are very vocal about their expectations.

Weak Integration

Inclusion requires multiple levels of followup and attention to detail over time. For inclusion to work, it must be implemented with all steps fully completed throughout the organization beginning with training people, updating documents, upgrading or redesigning facilities and updating all media. For example, opting to complete training and not update internal policies, templates and processes will result in inconsistent products and service experiences. Unpredictable and/or non-inclusive experiences will result in LGBT+ travellers becoming distrustful and issuing poor reviews/ratings and a loss of future and previous loyal LGBT+ travellers. There is also risk in damaging brand reputation as a result of inconsistent traveller experiences that would lead to complaints/poor reviews resulting in negative financial impacts and years of reputation repair.

Communication and Commitment

It is very important to have consistent internal (within the organization) and external (partners, vendors, community) communication as to what is changing and when and the strategy and expectations for employees, partners and vendors. It is critical to ensure employees understand, support and align with all the changes for inclusion, including new requirements and accountabilities. There should be clear timing and impacts communicated to all parties involved directly and indirectly to ensure consistency, clarity and alignment with company goals.

Commitment from company owners, leaders and employees is critical for organization change to succeed. For a successful LGBT+ inclusion strategy, all leaders, including middle management, will need to ensure there is alignment, acceptance and a sense of urgency conveyed to all employees and business partners. There also needs to be a representative or committee to support people, co-ordinate and oversee the project and its parts. This will foster the importance and expectations of accountability throughout the company. Without this critical alignment, an organization risks becoming part of the 70% of companies that fail in their attempt to implement change.²¹

Requirements and Resources for Implementation

To develop an inclusive product or service, Canadian tourism companies will need to deploy specialized inclusive training for employees (and others), upgrade policies with inclusive practices, language and processes, seek public and private community support and implement methods to monitor progress in order to sustain inclusive standards. Facility upgrades such as signage, websites and other marketing tools, social media and other forms of communication representing tourism companies will also require updates.

Training

Training courses are required to build awareness, teach appropriate language, dispel stereotypes, identify bias, learn context for better understanding and provide practice on how to appropriately engage with the LGBT+ community. Required training would include courses on the benefits of diversity and inclusion, unconscious bias, micro-aggressions, inclusive language, pronouns usage and more. Training will need to be mandatory for all employees who have indirect or direct contact with products and services. Over time, refresher courses and training updates will also be required to ensure all employees are provided with current information and to ensure consistent experiences for all LGBT+ travellers.¹¹

There will also need to be vigilance around the usage of stereotypical photography, names and gender roles that are used for marketing products and services to ensure inclusive language and depictions are utilized. Vendors and business partners are also likely to require some form of training to ensure they are aligned with inclusive practices.

Supplier diversity training may also be required for specific parts of the organization. Supplier diversity programs enable organizations to proactively support and acquire expertise from underutilized companies that are owned by LGBT+, women, minorities, people with disabilities and veterans. Using diverse suppliers supports reflecting your customers and community and providing specific products and services that could cater to special needs or considerations such as safety and awareness for the LGBT+ traveller.

It also fosters innovation, agility and inclusion. Supplier diversity training will ensure the program is run efficiently and effectively as part of your inclusion strategy.

Achieving Milestones

It will be critical to create and monitor milestones to ensure the inclusion strategy stays on track. Milestones include completing training and workshops, updating policies and procedures, updating templates and any product redesign before launching marketing around inclusion readiness and welcoming LGBT+ travellers to use products or services. Setting and tracking milestones will ensure readiness and minimize the risk of delivering inconsistent or poor experiences.

Time

Diversity and inclusion is often considered a journey because it is not a quick fix and requires maintenance and dedication from the entire organization. Leaders and employees can expect to spend time training, practising, implementing and monitoring throughout a business fiscal year to ensure consistency and the best inclusive experiences for all travel customers.

Operations and Technology

Depending on the types of products and services offered, companies may require updates or redesigns to promote inclusion. It is important all parts of the business operations be reviewed to ensure inclusion is supported. This would include reviewing and potentially updating policies, procedures and language used on documents and marketing, creating and posting new signage, website and other social media updates and similar types of updates. If a business offers travel accommodation, customer-facing service employees may require updated fields in software for gender identification and pronouns, along with updated templates for reservations or the addition of room details that support LGBT+ travellers.

It will include marketing and promotional assets (emails, brochures, website context, images, etc.) being upgraded or created to display or communicate LGBT+ inclusion. Policies and procedures for both LGBT+ employees and LGBT+ customers will also have to be included for things such as filing a discrimination complaint and unbiased hiring practices.

Partnerships

LGBT+ travellers rely upon referrals from friends, ratings and LGBT+ travel organizations, government sites and other media when deciding upon travelling choices. This provides an opportunity for Canadian tourism companies to partner with these organizations to bring awareness to inclusive offering for LGBT+ travellers. Developing strong co-operation between public and private organizations will also support developing and marketing products and services for LGBT+ travellers globally.

Partnerships may also support cost sharing or savings on marketing and promotions used to advertise inclusive products and services (refer to the successes of Whistler in British Columbia and Iceland).²² Partnerships also provide access to multiple forms of media, influencers and business opportunities to leverage throughout the inclusion journey.

Monitoring and Maintenance

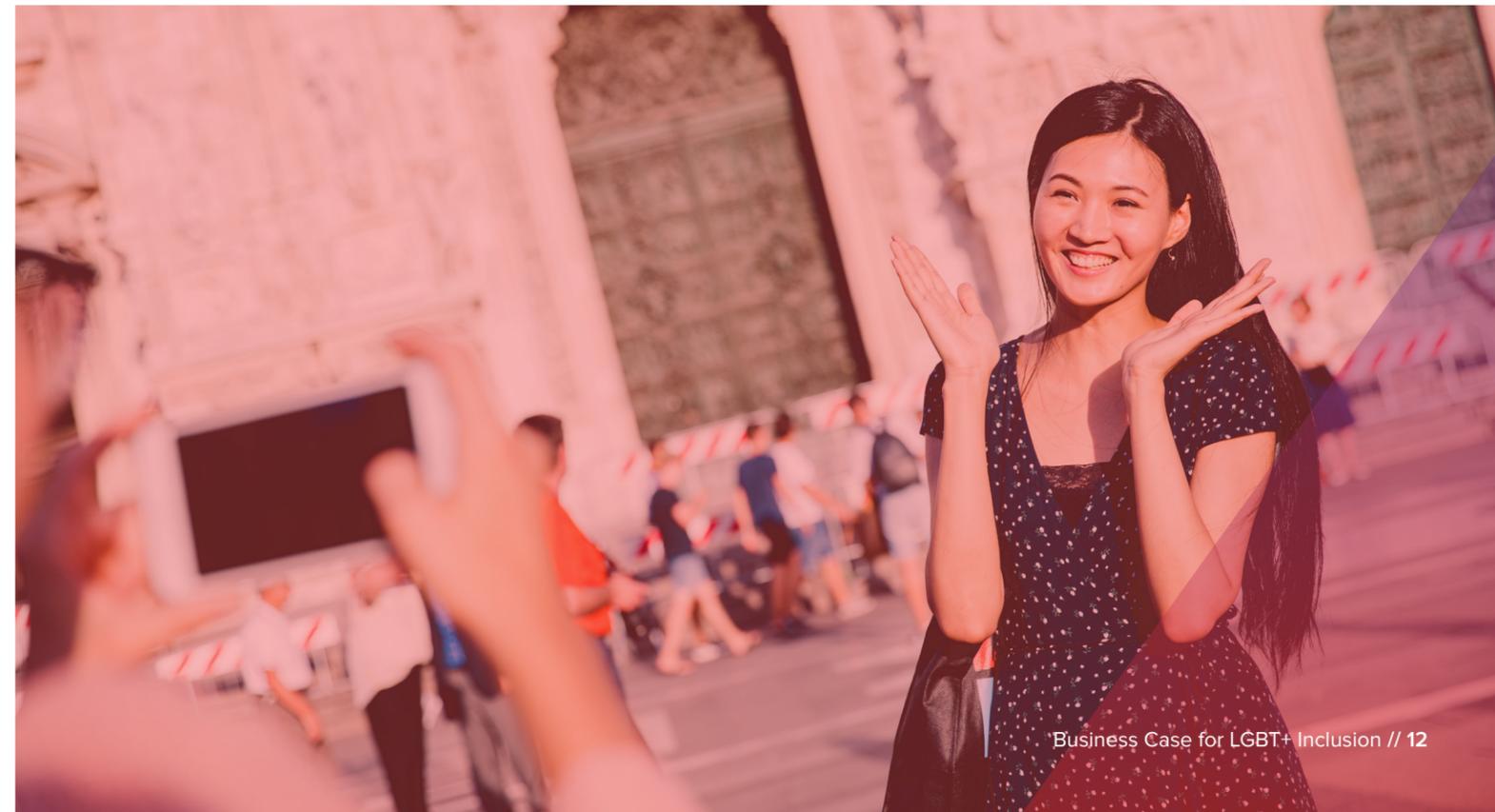
Measuring and maintaining an LGBT+ inclusive strategy successfully requires targets, predetermined monitoring frequency and consistent review data. It also requires a process with contingency plans in place to address when predetermine targets are not met. Inclusive practices and policies need to be measured and monitored over time, including checkpoints and updates, to ensure they reflect and stay current with market changes. Management needs to be held accountable, as do employees, for their contribution to the experiences of both LGBT+ employees and LGBT+ travellers.

Survey/Feedback

Organizations will require a continuous collection of feedback from LGBT+ travellers about their experiences with products and/or services that would be reviewed regularly to ensure any potential issues are addressed and corrected immediately. This will ensure LGBT+ travellers have consistent inclusive experiences with Canadian tourism products and services.

Policies and procedures for employees will need to be implemented for appropriate reaction to feedback once it is reviewed. Contingency plans will be required for retraining or additional training for employees who have contributed to negative customer feedback.

Continuous feedback and data collection from internal employees will also be required and will be reviewed consistently. This will ensure training, attraction and retention and employee engagement, policies and procedures are adhered to by all employees. This will also highlight retraining requirements and reduce the risk of inconsistent workplace experiences that don't align with your inclusion strategy.





Recommendation

In order to capitalize on missed growth opportunities in Canadian tourism, contribute to the recovery from COVID-19, stimulate the slowed economy and reflect the global and generation market shifts of increased diversity, the Canadian tourism industry needs to focus on including LGBT+ travellers as customers for their products and services.

LGBT+ travellers are valuable customers to the Canadian tourism industry. They continue to increase spending on tourism at a higher rate than the average Canadian and take the same or more vacations and leisure trips per year. LGBT+ travellers are loyal to products and services when they have good experiences and provide referrals to other potential LGBT+ travellers. Canadian LGBT+ travellers are already planning to resume domestic travel this year, but they need to be welcomed and encouraged through inclusive products and services.

Over the next year and beyond, it is critical to reassure and communicate to potential domestic and international LGBT+ travellers that Canadian tourism products and services are safe and inclusive products. Begin learning and implementing inclusive practices, awareness, language and policies with employees and partners to encourage and prepare for LGBT+ travellers immediately. Inclusion is not a quick fix; it takes time and consistent effort.

An LGBT+ inclusion strategy is a journey that benefits everyone.
Start yours today – the world needs more Canada!

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