

HAWAII TOURISM

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Reaching the LGBT Traveler Australia Report

*Profile of Hawai'i LGBT Visitors
and Non-Visitors*

January 2017



Produced by

 **CMI Community Marketing & Insights**
Community Marketing, Inc.





ABOUT CMI

25 YEARS OF LGBT INSIGHTS



- › Community Marketing & Insights (CMI) has been conducting LGBT consumer research for over 20 years. Our practice includes online surveys, in-depth interviews, intercepts, focus groups (on-site and online), and advisory boards. Industry leaders around the world depend on CMI’s research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, measurable marketing planning and assessment of return on investment.
- › Key findings have been published in the New York Times, Washington Post, Chicago Tribune, Los Angeles Times, Wall Street Journal, Forbes, USA Today, Chicago Tribune, Miami Herald, CBS News, NPR, CNN, Reuters, Associated Press, eMarketer, Mashable, and many other international, national and regional media.
- › CMI’s other research clients include leaders from a wide range of industries. In the past few years, studies have been produced for these and many other clients: VISIT FLORIDA, Empire State Development Corp., Las Vegas Convention & Visitors Authority, NYC & Company, Visit Orlando, Greater Fort Lauderdale CVB, Palm Springs Bureau of Tourism, Travel Portland, Choose Chicago, Tourism Toronto, Argentina Tourism Office, Hawaiian Airlines, Hyatt Hotels, Prudential, Wells Fargo Bank, Aetna, Target Brands, Hallmark, DirecTV, Johnson & Johnson, WNBA, American Cancer Society, Kaiser Family Foundation and numerous other corporations and organizations across North America and around the world.





Section 1

Australia Report Executive Summary & Key Findings





Executive Summary



Australians travel to a wide variety of Asian and Pacific Island destinations. Travel to Queensland, Australia is very popular among LGBT Australians, as is Thailand, which could satisfy tropical travel desires. Of note is that 32% indicated traveling to Northern or Southern California in the past three years, making California an important competitor to Hawai'i for Australian LGBT travel. 12% of LGBT Australian participants reported travel to Hawai'i in the past three years. That percentage is quite high considering that 19% of LGBT mainland USA residents reported visiting Hawai'i in the same period.

When asked about travel in the next two years, 23% of all Australian participants indicated an interest in Hawai'i. A total of 35% expressed interest in Northern or Southern California. Of note is that the interest in Thailand and Queensland decreased vs. actual travel on this question, which typically indicates that these destinations are more “been there” destinations, creating opportunity for Hawai'i. Again, compared to USA resident future travel plans to Hawai'i (at 27%), the 23% travel interest expressed by Australians is quite encouraging.

Hawai'i's LGBT-friendly rating is high for LGBT Australians (67%). While less than California's rate, it is higher than Queensland, Thailand and other destinations in the region.

31% of the LGBT Australian participants had visited Hawai'i at some point in the past as an adult. The percentage increases to 44% for those over age 40.



Executive Summary



The primary LGBT motivations to take any vacation are to explore and do new things, experience other cultures, and rest and relaxation. These three motivations were most important across all demographics. These primary LGBT motivations matched the USA report.

LGBT Australians are most likely to agree that Hawai'i provides a sense of relaxation, has unique scenery, and is friendly. They are least likely to agree that Hawai'i is a good value for the money and it's easy to meet other LGBT people. When asked if Hawai'i is a "great LGBT vacation destination," the response was more neutral. These findings are very similar to the USA report.

One of the most important themes of the Australian report is how closely the results match the United States LGBT report. This may indicate that targeted communications and creative may be appropriate for both countries.

The report did show consistent Hawai'i prospect strength for residents of New South Wales over other areas of Australia (as a combined number).

When comparing the 25-39 year olds with the age 40 and over group, the differences were negligible. There were some attitude differences that would be expected for these age breaks, as well some travel history differences that come with age and resources, but for the key questions like recent travel to Hawai'i, and future travel to Hawai'i, both age groups are equally viable markets.

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Section 2

Research Methodology





Methodology and Understanding the Report

Between December 2016 and January 2017, Community Marketing & Insights (CMI) fielded an online survey for the Hawai'i Tourism Authority to gauge tourism trends and motivations of the LGBT community. Participants were recruited from CMI's proprietary LGBT research Australian panel and supplemented through LGBT-specific outreach on Facebook in New South Wales.

This report covers Australia residents only. LGBTs living in the United States and other countries are reported in separate documents.

Australia participants were recruited with the following criteria:

- Identifies as a member of the LGBT community
- Age 25 or over
- Household income over \$60,000 Australian with some accommodation for those earning less than \$60,000 if they are single, retired or have a recent international travel history
- Taken at least one leisure trip of 800 or more kilometers away from home in the past 3 years

Due to the survey design, the participants do not reflect the entire LGBT community; rather they reflect LGBTs who are reasonable candidates for a trip to Hawai'i, based on known visitor income data.

ABOUT THE CMI LGBT RESEARCH PANEL

- › CMI has built a proprietary research panel of 70,000+ LGBT consumers through partnerships with more than 300 LGBT publications, blogs, websites, social media, apps, events and organizations over a 24-year period.
- › Importantly, the panel reflects the readership/membership of a broad range of LGBT-focused media, organizations and events. This means that the results summarized here are representative of consumers who are "out" and interacting within the LGBT community.
- › The panel is used for LGBT research only, and is never used for marketing purposes. All panel members are "active," meaning they have participated in CMI research in the past two years.



Australia LGBT Research Respondent Profile (N=343)

Identity

Gay Man	67%
Lesbian or Gay Woman	25%
Bisexual Woman	6%
Bisexual Man	2%
Transgender	2%

Age for Reporting

Age 25-39	52%
Age 40+	48%

Ethnicity

White / Caucasian/European	85%
Asian	8%
Aboriginal	2%
Mixed Race	3%
Other	3%

Relationship

Single	32%
Living with partner / No legal status	34%
Dating / Not living with partner	11%
Married	7%
Civil union or domestic partner	9%
Engaged to be married	5%
Other	2%

Income

Under \$60,000	13%
\$60,000 to \$79,999	18%
\$80,000 to \$99,999	12%
\$100,000 to \$124,999	14%
\$125,000 to \$149,000	8%
\$150,000 to \$199,999	15%
\$200,000 to \$249,999	10%
\$250,000 to \$499,999	4%
Over \$500,000	1%
Prefer not to answer	6%



LGBT Research Respondent Profile (N=343)

Top State/Territory

New South Wales	69%
Victoria	14%
Queensland	8%
Western Australia	3%
South Australia	2%
Australian Capital Territory	2%
Tasmania	1%
Northern Territory	<1%

Children

7%

Have children under 18 living at home



4%

Have grandchildren

Education



Post Graduate Degree	29%
College Graduate	32%
High School	39%

Employment

Employed, FT/PT	78%
Self-Employed	9%
Retired	7%
Other	6%



Thinking of the past three years, that is, since 2013, how many times have you traveled by air to a destination that was at least 800 kilometers away for a leisure trip?

	All LGBT	New South Wales (NSW)	Non-NSW	Age 25-39	Age 40+
1-2	24%	26%	19%	29%	18%
3-4	32%	31%	32%	32%	32%
5+	44%	42%	49%	39%	50%

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Section 3

Competing Destinations






LGBT Visitation by Demographic: Australians travel to a wide variety of Asian and Pacific Island destinations. Travel to Queensland, Australia is very popular for LGBT Australians, as is Thailand, which could satisfy tropical travel desires. Of note is that 32% indicated traveling to Northern or Southern California in the past three years, and California is an important competitor to Hawai'i for Australian LGBT travel. 12% of LGBT Australian participants reported travel to Hawai'i in the past three years. That percentage is not too much less than the 19% reported for the mainland USA resident report and represents healthy visitation to Hawai'i from LGBT Australians.



Which of the following destinations, if any, have you visited in the past three years?

	All LGBT	New South Wales (NSW)	Non-NSW	Age 25-39	Age 40+
Queensland	46%	49%	42%	47%	46%
New Zealand	35%	37%	31%	33%	36%
Thailand	29%	32%	23%	29%	29%
*Southern California, USA	27%	29%	22%	28%	25%
Singapore	22%	20%	25%	20%	24%
Bali	22%	23%	19%	23%	20%
**Northern California, USA	22%	24%	17%	18%	25%
Japan	18%	18%	17%	19%	16%
 Hawai'i, USA	12%	15%	6%	13%	12%
Indonesia	11%	11%	11%	12%	10%
Fiji	8%	9%	5%	8%	8%
Tahiti	1%	1%	1%	1%	1%
Other South Pacific	12%	11%	15%	11%	14%
None of the above	12%	9%	17%	11%	12%

*Full Text: Southern California, USA (Los Angeles, San Diego, Palm Springs). **Full Text: Southern California, USA (San Francisco, San Jose).






Future LGBT Visitation by Demographic: When asked about travel in the next two years, 23% of all Australian participants indicated interest in Hawai'i. A total of 35% expressed interest in Northern or Southern California. Of note is that the interest in Thailand and Queensland decreased vs. actual travel on this question, which typically indicates that these destinations are more “been there” destinations, creating opportunity for Hawai'i. Again, compared to USA resident future travel plans to Hawai'i (at 27%), the 23% travel interest expressed by LGBT Australians is quite encouraging.



Of the same destinations, which of the following do you plan to visit in the next two years? Please select all that apply.

	All LGBT	New South Wales (NSW)	Non-NSW	Age 25-39	Age 40+
New Zealand	41%	41%	41%	43%	39%
Queensland	35%	36%	33%	38%	33%
Japan	32%	31%	34%	37%	26%
Southern California, USA	26%	28%	21%	29%	23%
Northern California, USA	25%	26%	21%	23%	26%
Thailand	24%	24%	24%	23%	25%
 Hawai'i, USA	23%	27%	14%	23%	23%
Singapore	19%	16%	26%	14%	25%
Bali	18%	20%	16%	18%	19%
Fiji	12%	15%	6%	16%	7%
Indonesia	8%	9%	6%	8%	9%
Tahiti	2%	2%	1%	1%	3%
Other South Pacific	13%	15%	10%	14%	12%
None of the above	8%	7%	11%	6%	11%

*Full Text: Southern California, USA (Los Angeles, San Diego, Palm Springs)

**Full Text: Northern California, USA (San Francisco, San Jose)



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Section 4
LGBT-Friendly
Rating



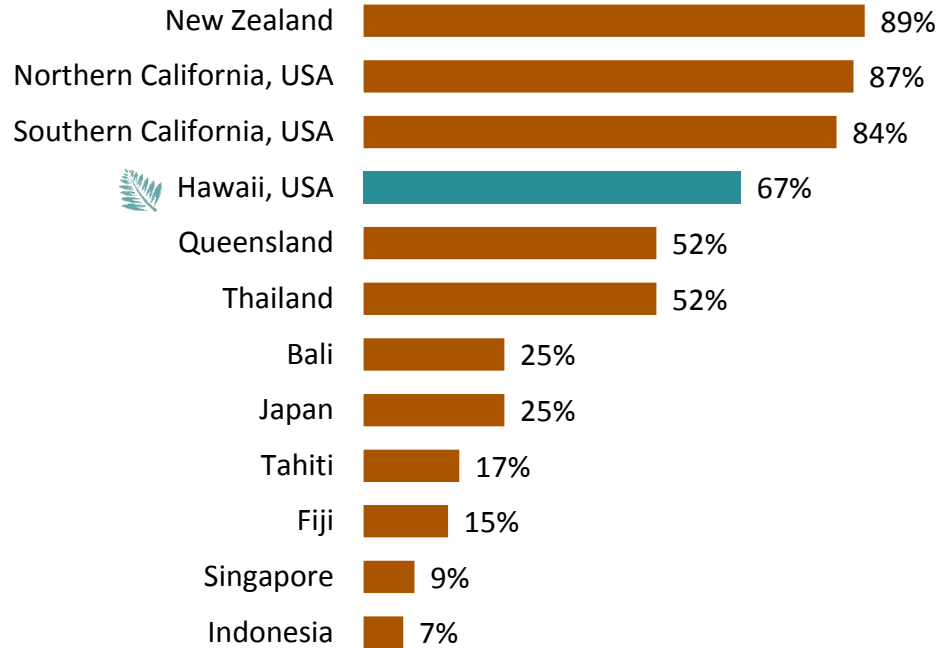


LGBT-Friendly Rating: Hawai'i's LGBT-friendly rating is quite high among Australians (67%). While less than California's rate, it is higher than Queensland, Thailand, and other destinations in the region.



On a 5-point scale, how LGBT-friendly would you rate the following destinations, where 5 is extremely LGBT-friendly and 1 is not at all LGBT-friendly? Please rate based on your personal experience or your impressions from what you have read or heard.

Total LGBT Friendly Ratings (5+4)



*Full Text: Southern California, USA (Los Angeles, San Diego, Palm Springs)

**Full Text: Northern California, USA (San Francisco, San Jose)





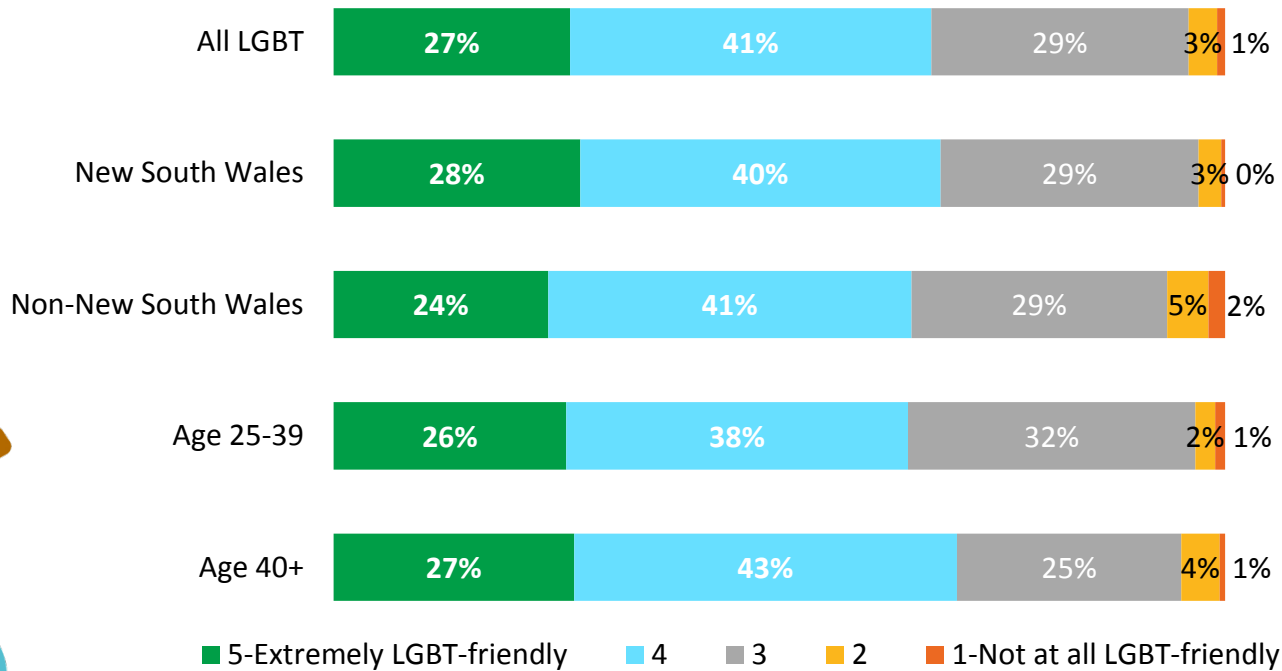
LGBT-Friendly Rating by Demographic: There were no major differences by age or residence in Hawai'i's LGBT-friendly rating.



On a 5-point scale, how LGBT-friendly would you rate the following destinations, where 5 is extremely LGBT-friendly and 1 is not at all LGBT-friendly? Please rate based on your personal experience or your impressions from what you have read or heard.

Hawai'i Ratings

Extremely LGBT Friendly → Not at all LGBT-friendly



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Section 5
LGBT Travel
Motivations





LGBT Motivations to Take Vacations: The primary LGBT motivations to take a vacation are to explore and do new things, experience other cultures, and rest and relaxation. These three motivations were most important across all demographics. These primary LGBT motivations matched the USA report.



Of the following reasons, which best describe why you take vacations? (Please select all that apply.)

	All LGBT	New South Wales (NSW)	Non-NSW	Age 25-39	Age 40+
To experience other cultures	76%	77%	74%	80%	72%
I can explore and do new things	72%	71%	76%	76%	69%
It's a great chance to rest and relax	69%	68%	71%	73%	65%
To learn new things	56%	57%	54%	60%	52%
I feel alive and energetic when I travel	51%	53%	46%	59%	42%
To seek adventure	50%	54%	43%	67%	33%
To connect with my spouse or partner	46%	47%	44%	46%	47%
To see for myself the authentic things I have read/heard about	45%	40%	56%	47%	42%
To be outdoors and experience nature	44%	45%	43%	52%	36%
To gain knowledge of history	44%	40%	52%	43%	44%
To indulge my passion for food and fine cuisine	42%	42%	43%	45%	39%
To do activities I can only do on vacation	37%	33%	45%	38%	36%
To celebrate or mark a special occasion	35%	37%	31%	34%	36%
I can splurge on myself when I travel	30%	30%	31%	27%	34%
To spend more time with my friends	26%	27%	22%	27%	24%
To spend more quality time with my family	23%	25%	20%	27%	20%
I can be more extravagant when I travel	19%	18%	19%	17%	21%
To engage in my hobbies	17%	16%	19%	21%	13%
To be the first among my friends to do something	5%	4%	7%	5%	6%
Other reasons	3%	3%	3%	2%	4%

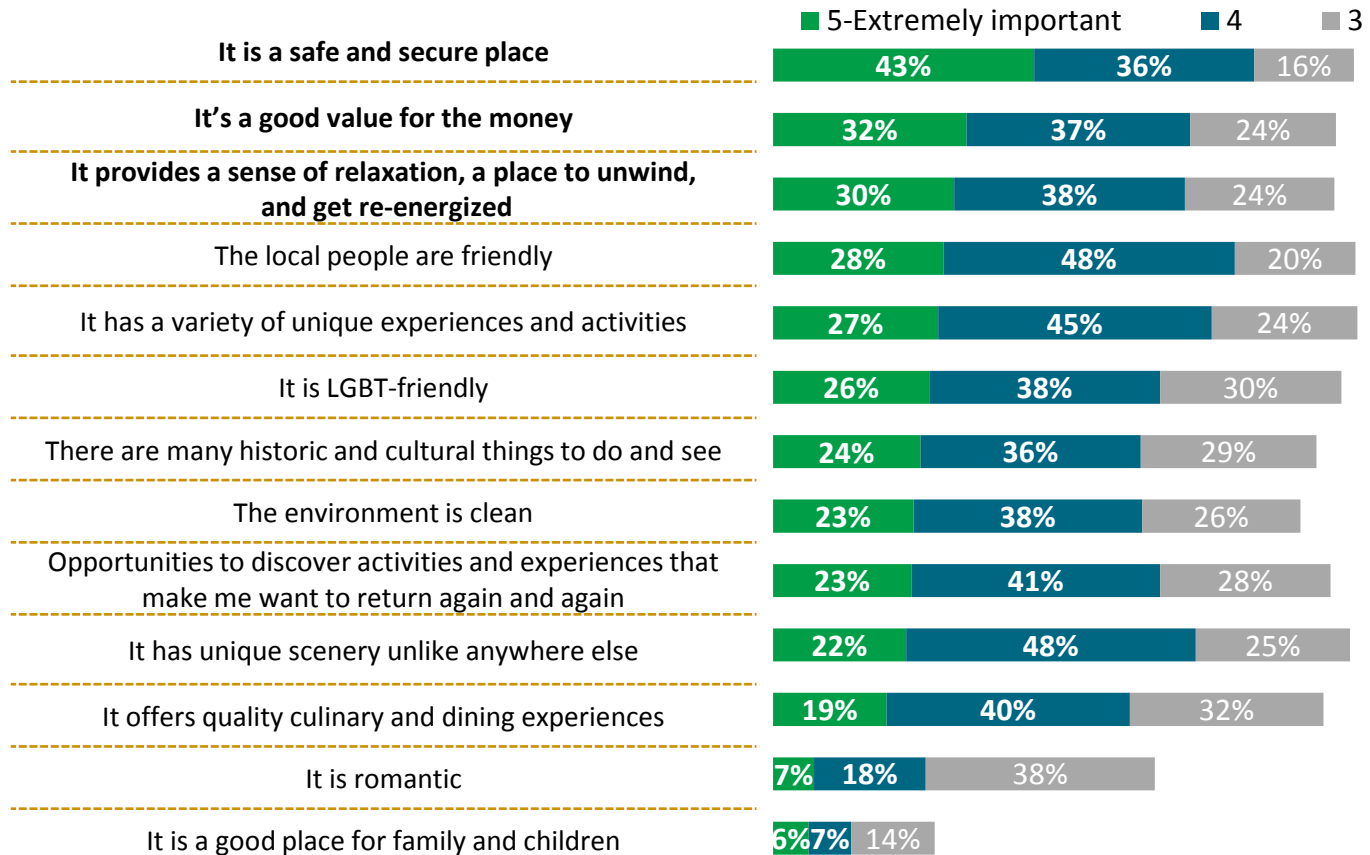




Travel Attributes: When traveling more than 800 kilometers to any destination, nearly all attributes scored 3 or above on the 5-point scale. The nuance is in the level of importance. Safety is the top attribute needed. Safety is an important element for most LGBT travelers, and LGBT-friendly is an important part of evaluating the safety of the destination. Value, relaxation, friendly locals, and unique experiences were the other top motivators.



On a 5-point scale, when choosing a vacation of 800 or more kilometers away from home, how important are the following attributes to you in a destination?

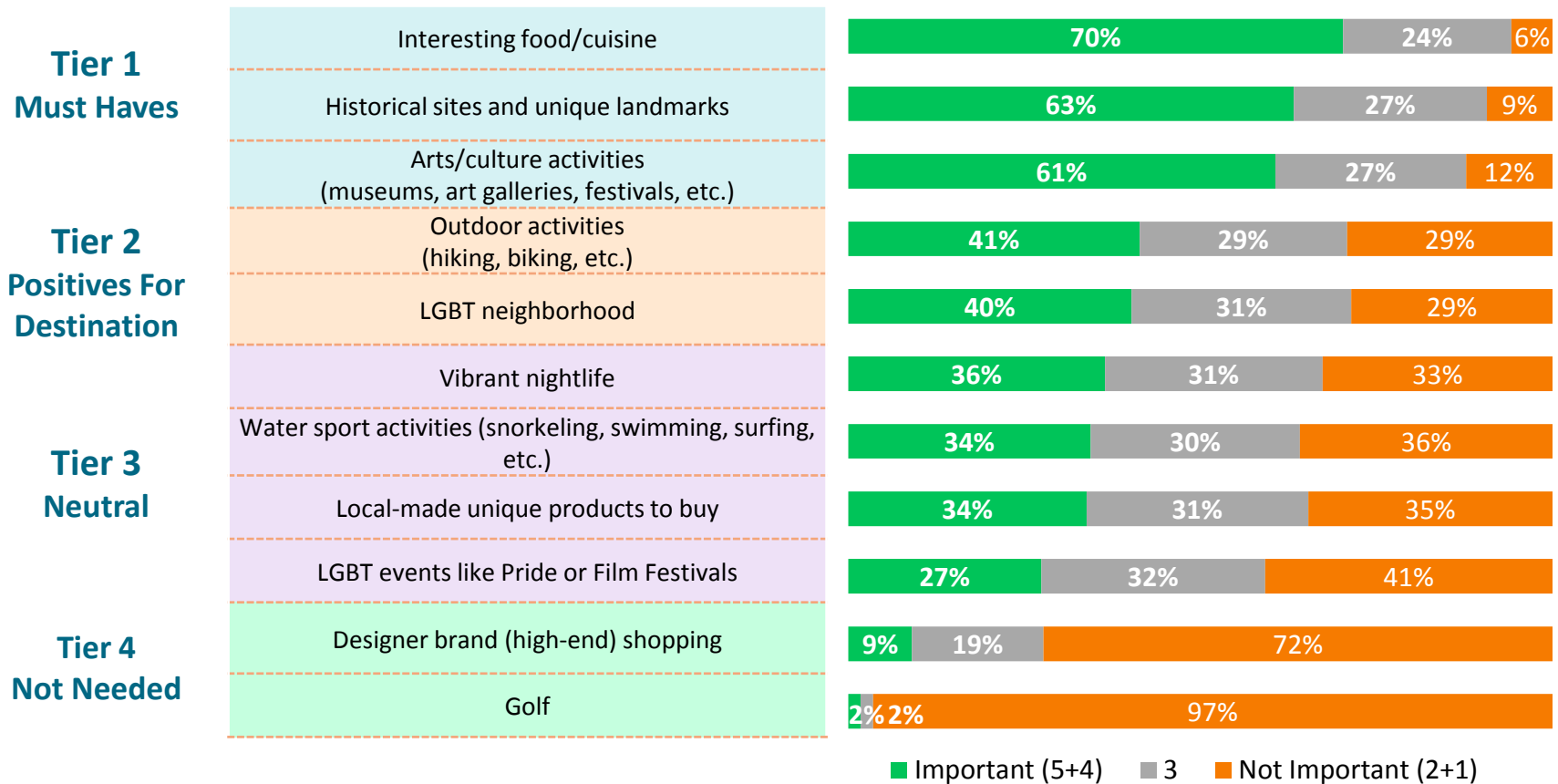




Travel Activities: When traveling more than 800 kilometers to any destination, there are some distinctions in preferred activities. The top three interests among survey respondents were food, history and culture. Of note is that golf and shopping scored especially low. LGBT-specific activities were more in the middle for importance. These rankings were very similar to the USA report.



On a 5-point scale, when selecting a vacation destination of 800 or more kilometers away from home, how important is it to you that the destination have the follow attractions and activities?





Travel Activities by Demographic: There are some important demographic differences for activity preferences. This type of nuance is important when Hawai'i is target marketing by residence and/or age within the LGBT community.



On a 5-point scale, when selecting a vacation destination of 800 or more kilometers away from home, how important is it to you that the destination have the follow attractions and activities?

Top Important Criteria for.....

Rated as 5-Extremely Important or 4 On the 5-point scale	New South Wales (NSW)	Non-NSW	Age 25-39	Age 40+
Interesting food/cuisine	71%	68%	71%	70%
Historical sites and unique landmarks	59%	72%	62%	65%
Arts/culture activities (museums, art galleries, festivals, etc.)	59%	65%	60%	61%
Outdoor activities (hiking, biking, etc.)	43%	37%	44%	38%
LGBT neighborhood	42%	36%	38%	42%
Vibrant nightlife	42%	25%	45%	27%
Water sport activities (snorkeling, swimming, surfing, etc.)	40%	23%	36%	33%
Local-made unique products to buy	32%	38%	31%	37%
LGBT events like Pride or Film Festivals	28%	26%	27%	28%



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Section 6
Profile of Last
Trip to Any
Destination

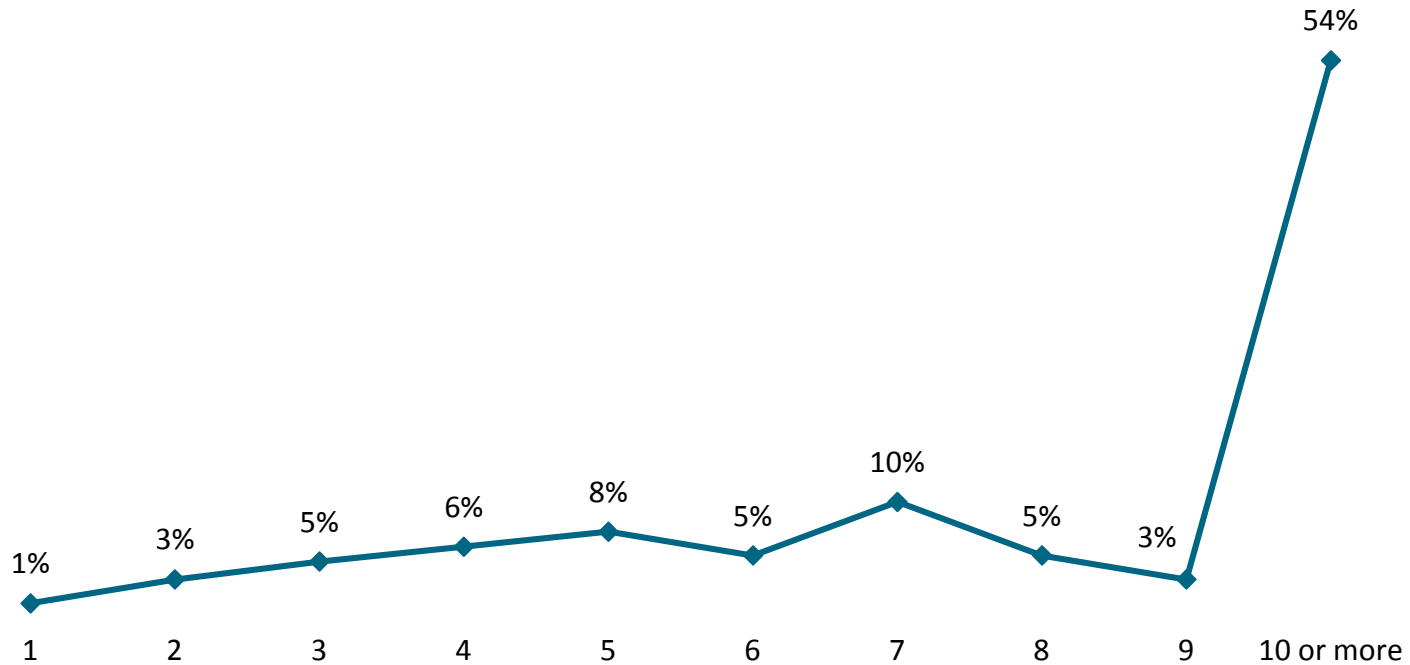




Nights Away: Clearly, LGBT Australians travel for longer periods of time than North Americans, with 54% affirmatively answering this question 10 or more nights away. For United States residents, the 10 or more nights percentage was 22% and for Canadians it was 38%.



Think back to last time you took a vacation 800 or more kilometers away from your home. How many nights did you spend during the above trip?





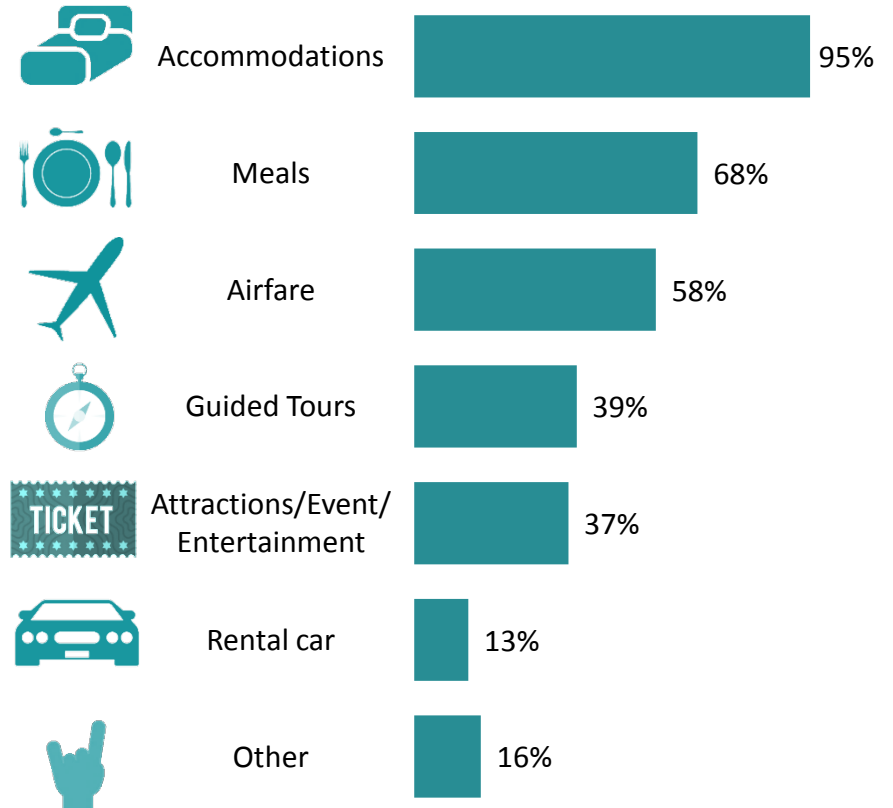
Profile of Participants' Last Vacation to Any Destination



Was this trip part of a pre-paid, inclusive tour package?



Which of the following was included in that package? (Please mark all that apply.)





Profile of Participants' Last Vacation to Any Destination



During the trip to your last vacation 800 or more kilometers away, where did you stay?

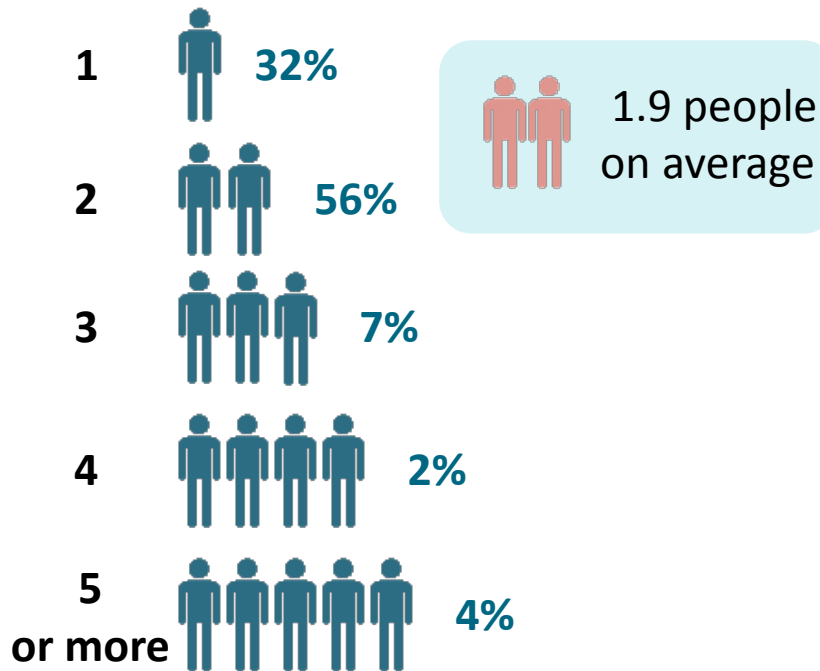
	All LGBT	New South Wales (NSW)	Non-NSW	Age 25-39	Age 40+
Hotel	71%	70%	73%	66%	77%
Friends or relatives	22%	20%	27%	23%	21%
Rental house	11%	11%	10%	11%	11%
Bed & breakfast	10%	11%	7%	13%	6%
Cruise ship	6%	4%	9%	3%	9%
Hostel	6%	6%	5%	8%	3%
Condominium	3%	3%	4%	3%	4%
Private room in private home	3%	3%	4%	3%	3%
Campsite, beach	2%	2%	3%	3%	1%
Shared room/space in private home	1%	1%	2%	3%	0%
Timeshare unit	1%	1%	2%	1%	1%
Other	11%	13%	6%	12%	10%





Profile of Participants' Last Vacation to Any Destination

of People on Trip



Total Average Spend (Per Person in the Following Travel Party)

All LGBT	\$3,510
New South Wales	\$3,453
Non-NSW	\$3,642
Age 25-39	\$3,209
Age 40+	\$3,853





Profile of Participants' Last Vacation to Any Destination

Among those who had pre-paid packages (Per Person in the Following Travel Party)

	Pre-paid Package (Low Base)	**Excluding the pre-paid amount**						Total	Grand Total
		Dining, Food, Beverage	Entertainment & Recreation	Transportation	Shopping	Lodging	Others		
All LGBT	\$ 2,585	\$ 491	\$ 273	\$ 553	\$ 223	\$ 423	\$ 146	\$ 2,110	\$ 4,695
New South Wales	\$ 2,664	\$ 450	\$ 302	\$ 446	\$ 261	\$ 466	\$ 102	\$ 2,028	\$ 4,692
Non-NSW	\$ 2,373	\$ 599	\$ 197	\$ 839	\$ 119	\$ 311	\$ 264	\$ 2,329	\$ 4,702
Age 25-39	\$ 1,871	\$ 417	\$ 360	\$ 338	\$ 215	\$ 288	\$ 110	\$ 1,728	\$ 3,600
Age 40+	\$ 3,049	\$ 539	\$ 217	\$ 693	\$ 228	\$ 511	\$ 170	\$ 2,358	\$ 5,406

Among those who did not have pre-paid packages (Per Person in the Following Travel Party)

		Dining, Food, Beverage	Entertainment & Recreation	Transportation	Shopping	Lodging	Others	Total	Grand Total
All LGBT		\$ 526	\$ 367	\$ 1,111	\$ 304	\$ 775	\$ 293	\$ 3,376	\$ 3,376
New South Wales		\$ 515	\$ 362	\$ 1,051	\$ 323	\$ 742	\$ 312	\$ 3,305	\$ 3,305
Non-NSW		\$ 550	\$ 379	\$ 1,247	\$ 261	\$ 849	\$ 250	\$ 3,535	\$ 3,535
Age 25-39		\$ 509	\$ 411	\$ 1,043	\$ 255	\$ 691	\$ 268	\$ 3,177	\$ 3,177
Age 40+		\$ 546	\$ 313	\$ 1,195	\$ 363	\$ 876	\$ 323	\$ 3,616	\$ 3,616

Among All LGBT
(Per Person in the Following Travel Party)

All LGBT	\$3,510		
New South Wales	\$3,453	Age 25-39	\$3,209
Non-NSW	\$3,642	Age 40+	\$3,853



Profile of Australia Participants' Last Vacation to Any Destination

	Package people n=33	Non-package people n=290
Avg. No. of people on trip	1.5	2.0
Avg. No. of nights on trip	8.3	7.9

Average Spending Per Person Per Day Among All LGBT in Australian Dollars

Dining, Food, Beverage	\$ 67
Entertainment & Recreation	\$ 45
Shopping	\$ 39
Lodging	\$ 100
Others	\$ 34

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Section 7
LGBT Hawai'i
Travel





Lifetime Visits to Hawai'i: 31% of the LGBT participants had visited Hawai'i as an adult at some point in the past. The percentage increases to 44% for those over age 40.



How many times have you visited Hawai'i as an adult, that is, since you were 18 years old?

	All LGBT	Age 25-39	Age 40+
Never visited Hawai'i before as an adult	69%	80%	56%
1-2	22%	18%	27%
3-5	5%	2%	9%
6 or more	4%	0%	8%

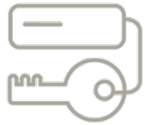




Type of Hotel: The type of hotel favored when booking Hawai'i was quite varied. No one type of accommodation scored poorly. While LGBT-specific reasons are not a key driver of type of hotel booked, most are at least somewhat open to some LGBT influencers.



How likely are you to book these types of accommodations when visiting Hawai'i?



Among All LGBT

Very likely Somewhat likely Not likely

An accommodation based on price and/or location, independent of LGBT-specific reasons



At a hotel or resort operated by a brand known to be LGBT-friendly



A small B&B or guesthouse promoted as LGBT-owned or LGBT-friendly



At a condo or rental house promoted as LGBT-owned or LGBT-friendly



AirBnB or shared room stay promoted as LGBT-owned or LGBT-friendly



An LGBT-dedicated hotel, resort or guesthouse

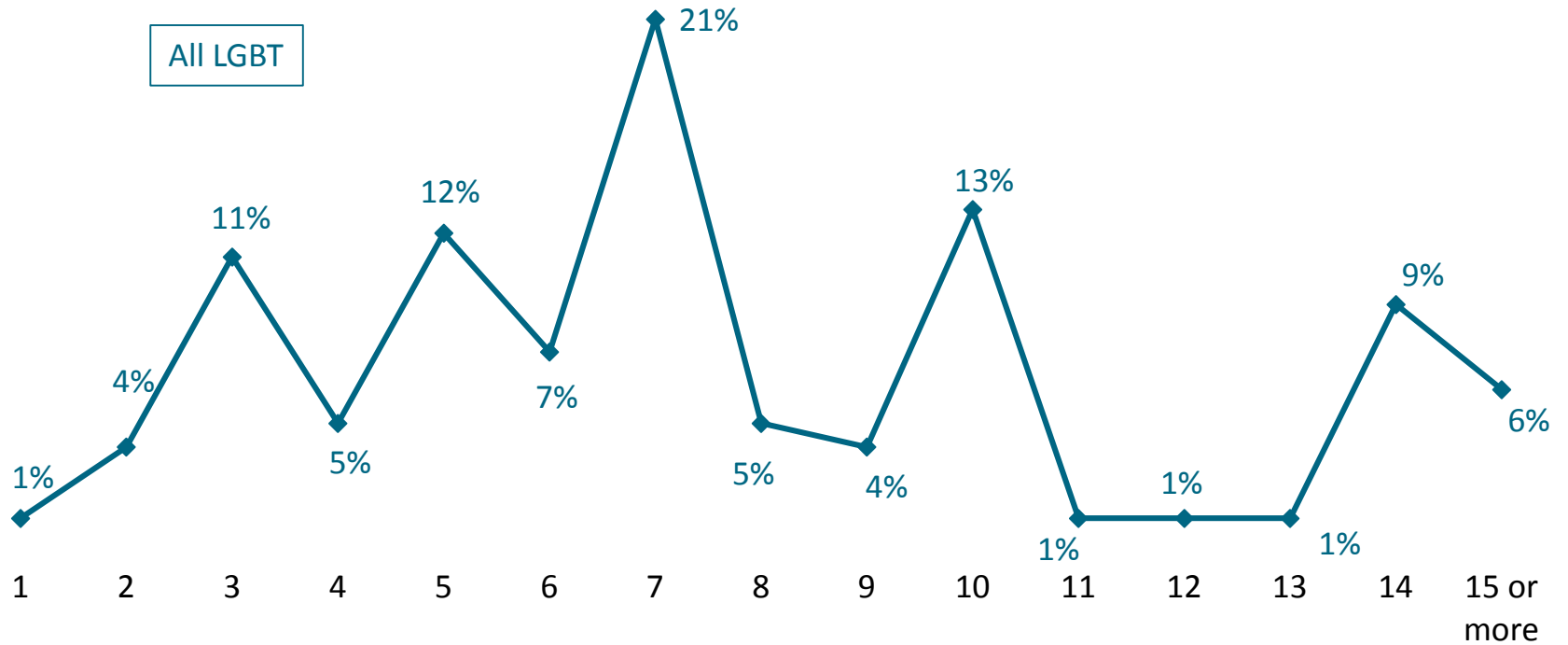




Hotel Night Distribution: For the 107 LGBT visitors, the median number of nights in Hawa'i is seven (the same as the United States visitor).



On your last trip to Hawai'i, how many nights was this?

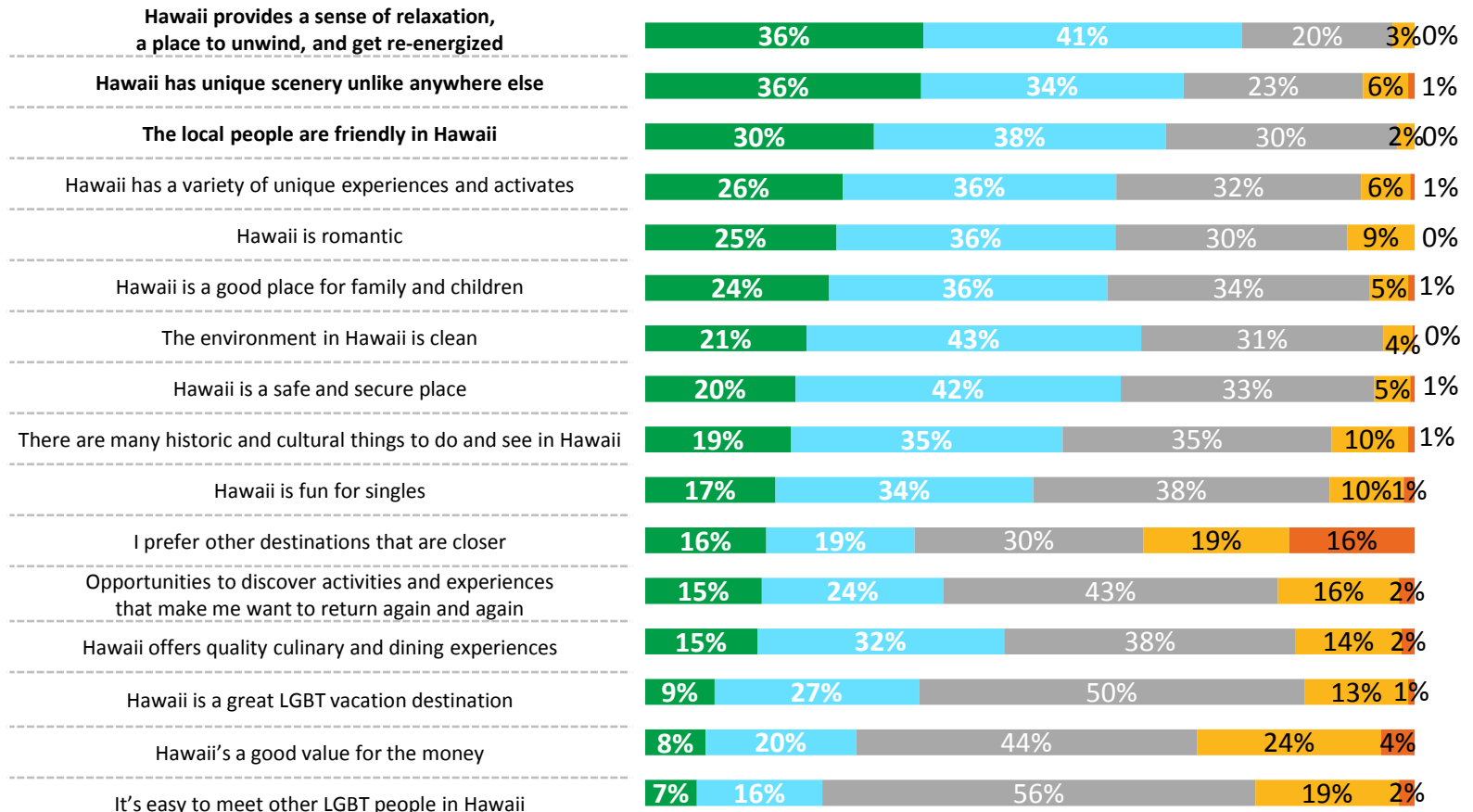




Hawai'i Attributes: LGBTs are most likely to agree that Hawai'i provides a sense of relaxation, has unique scenery, and is friendly. They are least likely to agree that Hawai'i is a good value for the money and it's easy to meet other LGBT people. When asked if Hawai'i is a "great LGBT vacation destination," the response was more neutral. These ranks are very similar to the USA report.



On a 5-point scale, below are some attitudes in regards to traveling to Hawai'i. Please tell us how much you personally agree or disagree with these statements, regardless of whether you have visited Hawai'i.





Hawai'i Attributes by Age



On a 5-point scale, below are some attitudes in regards to traveling to Hawai'i. Please tell us how much you personally agree or disagree with these statements, regardless of whether you have visited Hawai'i.

	Among Age 25-39			Among Age 40+		
	Agree 5+4	Neutral 3	Disagree 2+1	Agree 5+4	Neutral 3	Disagree 2+1
Hawaii provides a sense of relaxation, a place to unwind, and get re-energized	84%	14%	2%	71%	26%	4%
The local people are friendly in Hawaii	70%	28%	2%	65%	33%	2%
Hawaii has unique scenery unlike anywhere else	69%	26%	5%	71%	20%	9%
The environment in Hawaii is clean	67%	31%	3%	62%	33%	6%
Hawaii is romantic	67%	26%	8%	55%	35%	10%
Hawaii is a good place for family and children	64%	32%	4%	56%	36%	8%
Hawaii is a safe and secure place	63%	34%	3%	60%	32%	8%
Hawaii has a variety of unique experiences and activates	62%	32%	6%	61%	31%	8%
There are many historic and cultural things to do and see in Hawaii	59%	32%	9%	49%	39%	12%
Hawaii is fun for singles	52%	39%	9%	49%	38%	13%
Hawaii offers quality culinary and dining experiences	42%	44%	14%	52%	31%	17%
Opportunities to discover activities and experiences that make me want to return again and again	40%	46%	14%	37%	41%	21%
I prefer other destinations that are closer	38%	27%	35%	32%	33%	36%
Hawaii is a great LGBT vacation destination	37%	51%	12%	34%	49%	17%
Hawaii's a good value for the money	26%	44%	30%	29%	44%	26%
It's easy to meet other LGBT people in Hawaii	20%	60%	20%	26%	52%	21%

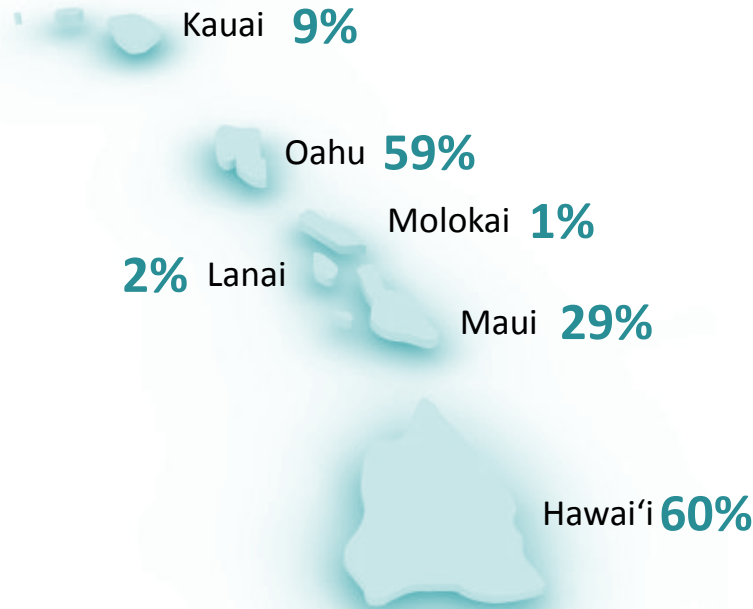


Preferred Island: Caution is needed on this slide because of the low base, but Oahu and the Big Island were the islands most likely to be visited by LGBT Australians. Maui ranked lower than the USA report.

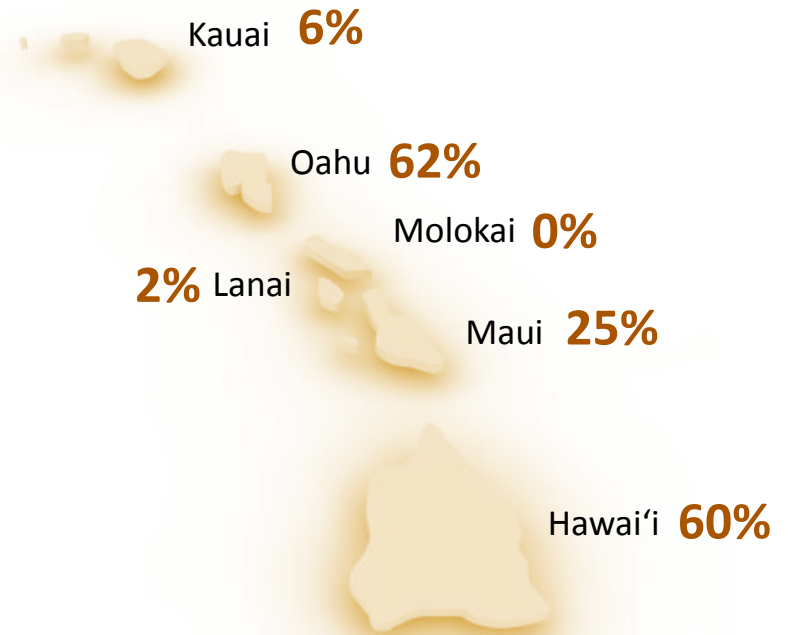


On your last trip to Hawai'i, what islands did you visit? (Please mark all that apply)

Visit Any Time During Life
All LGBT



Past Five Year Visitors



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Section 8
LGBT-Specific
Programming and
Events





LGBT Programming: Analyzing the entire LGBT participant group, no LGBT-specific program or event had overwhelming support to encourage travel to the islands. LGBT cruises and Pride ranked the strongest.



On a 5-point scale, if the following types of LGBT events were offered, how likely are you to travel to Hawai'i to participate in the events?



An LGBT outdoor adventure week (shared hikes and water activities)

A yoga or healing retreat with an LGBT focus

LGBT film festival

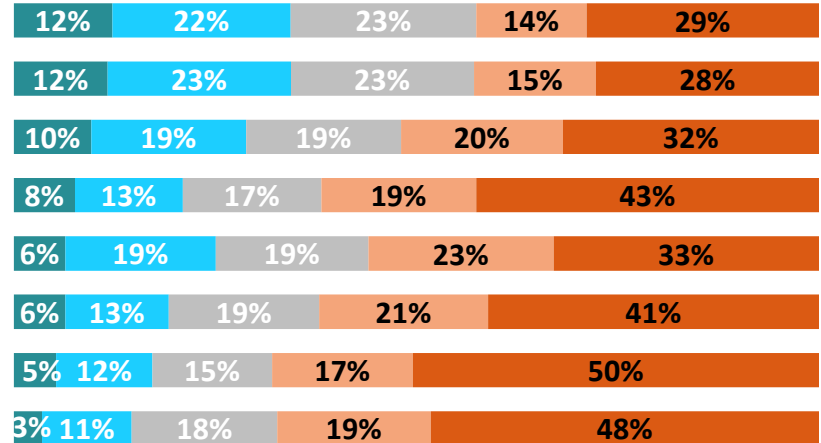
An LGBT professional conference

LGBT high energy dance event

LGBT sports events or tournaments

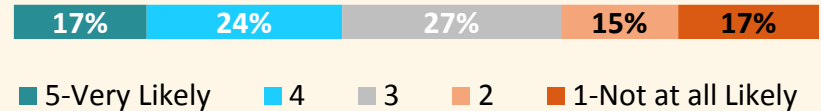
LGBT multi-island cruise

LGBT Pride festival



Shown to Women Only

An event specifically for lesbians / women





LGBT Programming by Demographic



On a 5-point scale, if the following types of LGBT events were offered, how likely are you to travel to Hawai'i to participate in the events?

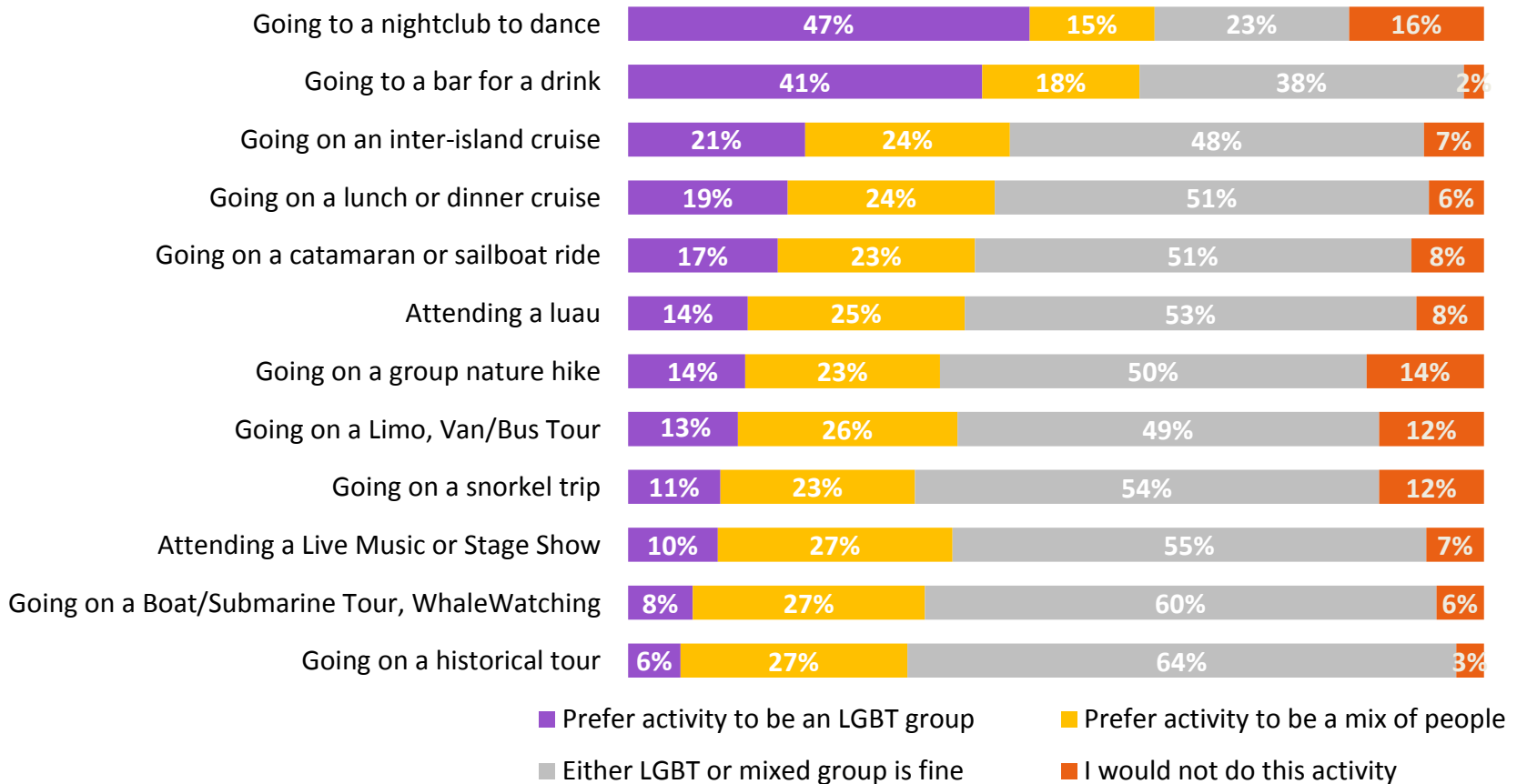
Rated as 5-Very Likely or 4 On the 5-point scale	New South Wales	Non-NSW	Age 25-39	Age 40+
LGBT Pride festival	39%	25%	34%	34%
LGBT multi-island cruise	37%	29%	35%	34%
An LGBT outdoor adventure week (shared hikes and water activities)	31%	25%	34%	23%
LGBT film festival	25%	26%	24%	26%
A yoga or healing retreat with an LGBT focus	24%	15%	27%	15%
LGBT high energy dance event	21%	8%	19%	15%
An LGBT professional conference	19%	20%	20%	18%
LGBT sports events or tournaments	16%	12%	14%	15%
Shown to <u>Women Only</u>				
An event specifically for lesbians / women	41%	39%	42%	39%
	N=85	N=18	N=72	N=31



LGBT-specific Activities: There is support for LGBT-specific bars and nightclubs on the islands. The appeal for other LGBT-specific activities is more limited, but the results do show that almost 1 in 5 LGBTs are interested activities that are LGBT-dedicated.



When traveling to Hawai'i, how important is it to you that the following activities are dedicated to LGBT community members vs. a mix of all people?





Age Comparisons



When traveling to Hawai'i, how important is it to you that the following activities are dedicated to LGBT community members vs. a mix of all people?

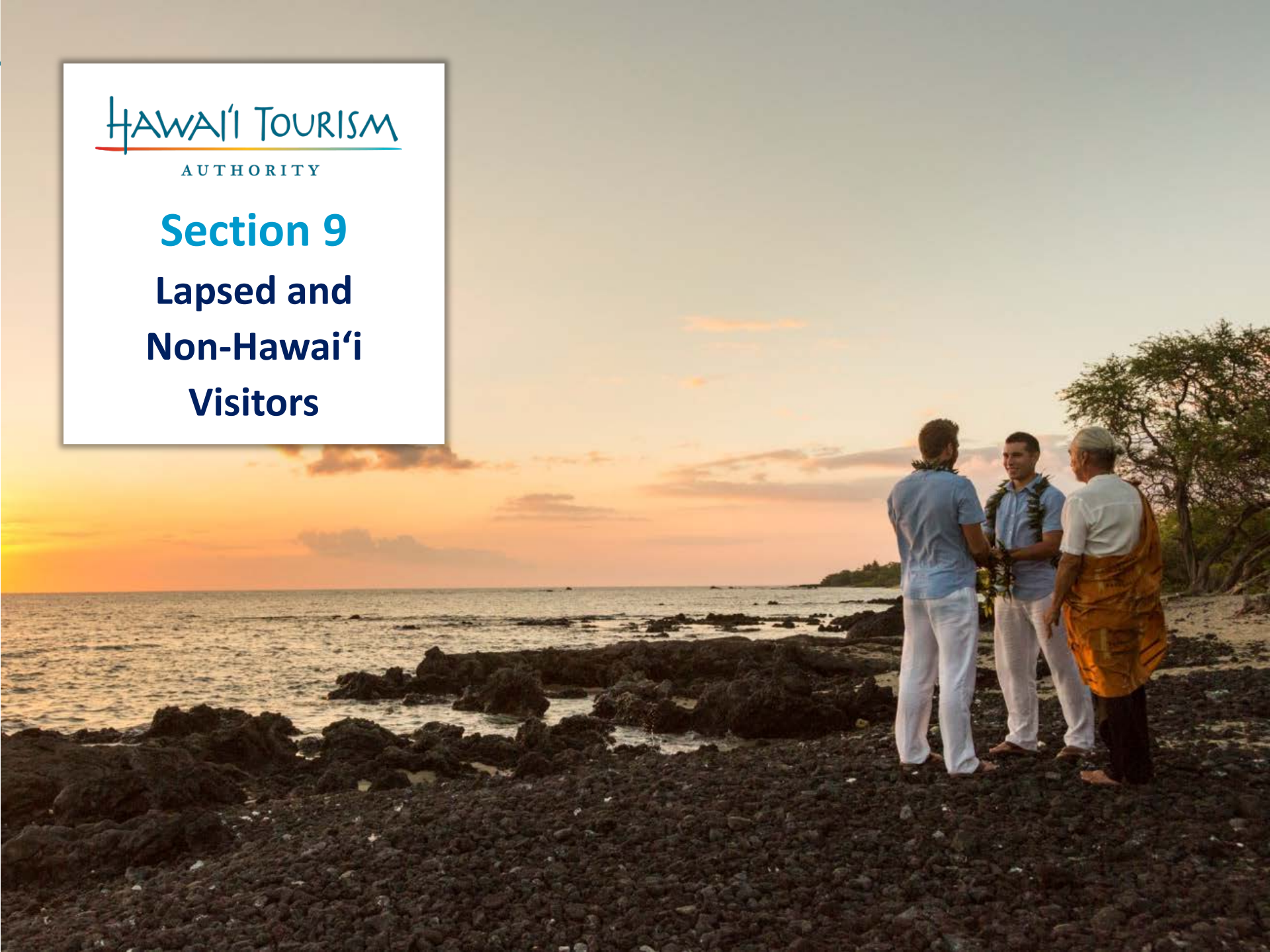
	Age 25-39 who prefer the activity to be in a...			Age 40+ who prefer the activity to be in a...		
	LGBT Group	Mixed Group	Either is fine	LGBT Group	Mixed Group	Either is fine
Going to a nightclub to dance	47%	16%	27%	47%	13%	18%
Going to a bar for a drink	38%	18%	44%	45%	19%	31%
Going on an inter-island cruise	21%	23%	51%	21%	25%	46%
Going on a catamaran or sailboat ride	14%	25%	56%	21%	21%	45%
Going on a lunch or dinner cruise	13%	23%	59%	25%	26%	41%
Attending a luau	12%	26%	56%	17%	25%	49%
Going on a Limo, Van/Bus Tour	11%	26%	53%	15%	26%	45%
Attending a Live Music or Stage Show	10%	28%	58%	11%	26%	53%
Going on a group nature hike	9%	26%	56%	19%	19%	44%
Going on a snorkel trip	8%	24%	61%	13%	21%	47%
Going on a Boat/Submarine Tour, WhaleWatching	4%	29%	65%	11%	25%	54%
Going on a historical tour	3%	27%	69%	10%	26%	59%



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Section 9
Lapsed and
Non-Hawai'i
Visitors





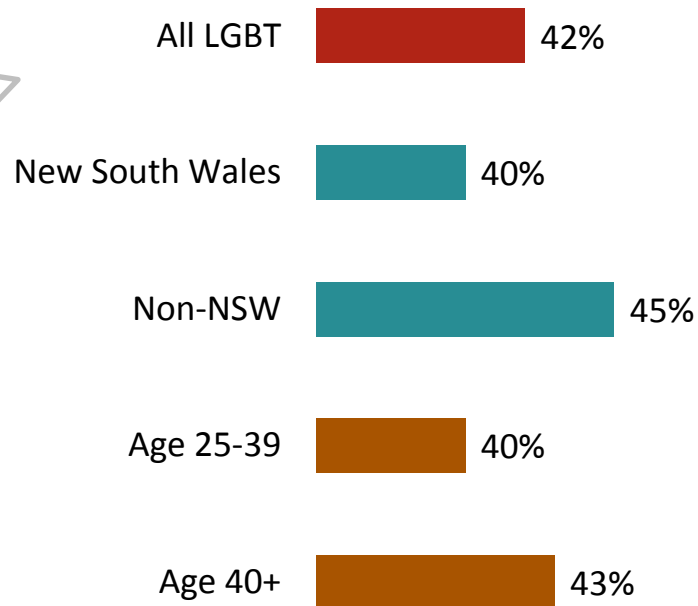
Non-Visitor Consideration: 42% of LGBT non-visitors indicated that they had previously considered traveling to Hawai'i but decided not to visit. The consideration rate is relatively stable by age and residence.



Have you previously considered visiting Hawai'i but decided not to after all?

Among Those Who Never Visited Hawai'i as an Adult

42%
Yes,
 I have previously considered visiting Hawai'i but decided not to after all.





Reasons for Lapsed Visitors and Non-Visitors



Why did you decide not to visit Hawai'i in the past 3 years? (Please mark all that apply.)

Top reasons people decided not to visit Hawai'i



Financial reasons/travel costs 31%



Better value at another destination 30%



Not enough time to travel 20%



Not familiar with what there is to see and do in Hawaii 17%

Negative LGBT-specific Concerns are Not Reasons to Avoid Hawai'i

Not recommended by family or friends Only 4%

Not enough LGBT-dedicated activities Only 3%

Hawai'i is not an LGBT-friendly destination Only 2%



Expanded Reasons for Lapsed Visitors by Demographic



Why did you decide not to visit Hawai'i in the past 3 years? (Please mark all that apply.)

	All LGBT	New South Wales	Non-NSW	Age 25-39	Age 40+
Financial reasons/travel costs	31%	34%	24%	38%	23%
Better value at another destination	30%	28%	32%	33%	26%
Not enough time to travel	20%	19%	23%	23%	17%
Not familiar with what there is to see and do in Hawaii	17%	17%	18%	19%	15%
Not sure which island(s) In Hawaii to visit	13%	13%	13%	14%	11%
Been there and prefer other destinations	12%	10%	17%	3%	22%
No family or friends to visit there	9%	8%	12%	9%	9%
Prefer destinations closer to home	9%	7%	12%	8%	10%
Flight to Hawaii is too long	8%	7%	9%	6%	9%
Other destinations are higher priorities	7%	6%	8%	5%	8%
Not recommended by family or friends	4%	3%	7%	5%	3%
Not enough LGBT-dedicated activities	3%	3%	3%	1%	6%
Not interested in visiting Hawaii	3%	2%	5%	3%	3%
Never thought about going to Hawaii	2%	3%	1%	3%	2%
Safety concerns in Hawaii	2%	1%	4%	0%	3%
Hawaii is not an LGBT friendly destination	2%	1%	3%	1%	2%
Do not like the climate/weather in Hawaii	1%	2%	1%	1%	1%
Plan to go to Hawaii in the future	1%	2%	0%	1%	1%
Hawaii is too touristy	1%	2%	0%	1%	1%
Have young children at home and cannot travel long distances	1%	1%	0%	1%	1%
Been there and had a bad experience	1%	1%	1%	1%	1%
Health Reasons	1%	1%	0%	0%	1%
It's relatively difficult to get a U.S. visa	1%	1%	0%	1%	1%
Other reasons	5%	5%	6%	4%	6%

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Section 10 Marketing And Outreach





Media Planning Charts:



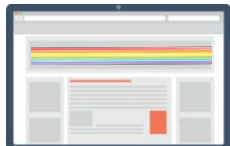
How often do you read LGBT-specific print publications such as LGBT magazines or newspapers?



	All LGBT	New South Wales	Non-NSW	Age 25-39	Age 40+
Weekly	20%	20%	20%	13%	29%
Monthly	28%	27%	31%	26%	31%
A few times a year	36%	36%	38%	42%	31%
Never	15%	17%	11%	20%	9%



How often do you view LGBT-specific websites, either news or entertainment?



	All LGBT	New South Wales	Non-NSW	Age 25-39	Age 40+
Weekly	50%	45%	60%	46%	55%
Monthly	25%	28%	19%	27%	23%
A few times a year	21%	22%	19%	22%	20%
Never	4%	5%	2%	6%	2%

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Section 11

Planning, Booking and In-Destination Motivators





Travel Planning Flow Chart: All Australian LGBT



At which stage in the vacation planning and booking process do you use the following sources?
(Please mark all that apply.)

	Travel Inspiration	Travel Planning and Booking	In-Destination	Do Not Use
Airline website	25%	84%	11%	8%
Online booking sites (e.g., Expedia, Travelocity)	37%	79%	13%	10%
Hotel website	28%	77%	13%	10%
Destination website	51%	52%	30%	14%
Recommendations from friends or relatives	64%	48%	24%	9%
Travel apps	34%	45%	35%	31%
Mainstream travel websites or blogs	54%	32%	10%	29%
Social media (e.g., Facebook, Instagram, Pinterest)	61%	29%	24%	24%
LGBT websites or blogs	44%	28%	15%	35%
Travel guide books (e.g., Fodors, Frommers)	35%	28%	24%	43%
Travel agent	12%	26%	5%	65%
Adventure/outdoor/travel magazines	39%	19%	10%	48%
LGBT magazines	35%	19%	10%	50%
Television/Radio	39%	13%	6%	50%





Travel Planning Flow Chart: Among Age 25-39



At which stage in the vacation planning and booking process do you use the following sources?
(Please mark all that apply.)

Among Age 25-39

	Travel Inspiration	Travel Planning and Booking	In-Destination	Do Not Use
Airline website	29%	86%	11%	7%
Hotel website	30%	81%	13%	11%
Online booking sites (e.g., Expedia, Travelocity)	43%	79%	16%	11%
Recommendations from friends or relatives	74%	54%	30%	4%
Destination website	54%	49%	28%	16%
Travel apps	34%	48%	38%	28%
Social media (e.g., Facebook, Instagram, Pinterest)	74%	31%	28%	16%
Travel guide books (e.g., Fodors, Frommers)	39%	31%	24%	44%
Mainstream travel websites or blogs	59%	29%	7%	30%
LGBT websites or blogs	46%	26%	13%	40%
Adventure/outdoor/travel magazines	44%	22%	9%	45%
Travel agent	13%	22%	4%	70%
LGBT magazines	33%	14%	4%	58%
Television/Radio	40%	10%	4%	54%





Travel Planning Flow Chart: Among Age 40+



At which stage in the vacation planning and booking process do you use the following sources?
(Please mark all that apply.)

Among Age 40+

	Travel Inspiration	Travel Planning and Booking	In-Destination	Do Not Use
Airline website	21%	82%	11%	9%
Online booking sites (e.g., Expedia, Travelocity)	30%	79%	10%	9%
Hotel website	26%	74%	12%	10%
Destination website	47%	55%	32%	12%
Travel apps	34%	43%	32%	35%
Recommendations from friends or relatives	53%	42%	18%	15%
Mainstream travel websites or blogs	47%	34%	14%	27%
LGBT websites or blogs	42%	31%	17%	29%
Travel agent	11%	30%	6%	60%
Social media (e.g., Facebook, Instagram, Pinterest)	47%	26%	20%	34%
Travel guide books (e.g., Fodors, Frommers)	30%	26%	24%	41%
LGBT magazines	36%	24%	17%	40%
Television/Radio	37%	16%	8%	46%
Adventure/outdoor/travel magazines	34%	16%	10%	52%





Mahalo...

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