

HAWAII TOURISM

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Reaching LGBT Travelers: Japan Report

*Profile of Japanese
International Visitors*

August 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 25 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, 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.



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Section 1

Research Methodology





Methodology and Understanding the Report

From June 21 to July 25, 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 in Japan. Participants were invited through major Japanese LGBT media and websites as well as social media to complete the 8-minute online survey. The incentive of a chance to win one of twenty 3,000 JPY amazon.co.jp electronic gift cards was provided to encourage participation in the study.

This report covers Japan residents only. Because CMI does not have a significant panel presence in Japan, participants were recruited from social media and major LGBT media and websites in Japan with the following qualifications:

- Identifies as a member of the LGBT community
- Age 25 or over
- Annual household income over 2,000,000 JPY
- Took at least one leisure trip outside Japan 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.

The data collected has a gay & bisexual men vs. lesbian & bisexual women ratio of 2:1, which CMI believes reflected a reasonable ratio of potential Hawai'i visitors. But when looking at the lesbian & bi women data alone, it's only directional because of the low base number (n=78).

The survey has a margin of error of ±6.08% at a 95% level of confidence.

ABOUT THE CMI LGBT RESEARCH PANEL

- › CMI has built a proprietary research panel of 80,000+ LGBT consumers through partnerships with more than 300 LGBT publications, blogs, websites, social media, apps, events, and organizations over a 25-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.



Japan LGBT Research Respondent Profile (N=260)

The respondents had a male vs. female gender distribution of 2:1. In addition, 10% of the respondents represented the transgender community in Japan. Unlike other Asian target markets, the Japanese respondents trended older and had a good representation across all age groups. The respondents' median annual HHI is ¥ 4,892,085. Respondents came from 28 prefectures and half of them were from the Tokyo Prefecture.

Identity

Gay & Bi Men	60%
Lesbian & Bi Women	30%
Transgender	10%

Age

25-29		15%
30-34		19%
35-39		23%
40-44		18%
45-49		13%
50 or older		11%

Annual Household Income

¥2,000,000-3,999,999		34%
¥4,000,000-5,999,999		23%
¥6,000,000-7,999,999		13%
¥8,000,000-9,999,999		11%
¥10,000,000-14,999,999		10%
¥15,000,000+		3%
Prefer not to answer		7%

Median HHI:
¥4,892,085
Average HHI:
¥6,026,628

Top Prefectures

Tokyo	50%
Osaka	11%
Kanagawa	7%
Saitama	5%
Chiba	5%

*Participants were from 28 prefectures. Aomori, Iwate, Miyagi, Akita, Yamagata, Tochigi, Gunma, Niigata, Toyama, Ishikawa, Yamanashi, Wakayama, Tottori, Shimane, Yamaguchi, Tokushima, Kōchi, Saga, and Ōita Prefectures were not represented.



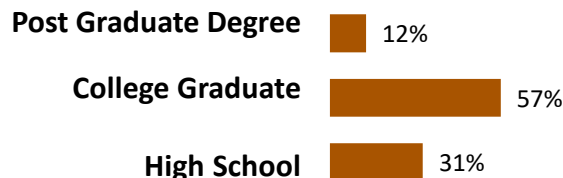
Japan LGBT Research Respondent Profile (N=260)

71% of the respondents were either single or dating a same-sex partner, and 69% of them obtained at least a college degree. 92% of the respondents were either working for themselves or someone else. On average, the respondents have taken 3.3 trips to destinations outside Japan in the past 3 years.

Relationship

Single or dating a same-sex partner	71%
Living with a same-sex partner	20%
Engaged to be married	2%
Married or certified same-sex partnership	5%
Other	2%

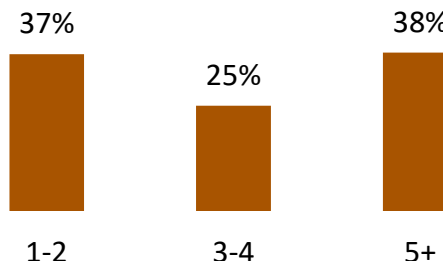
Education



Employment

Employed, Full-Time	66%
Employed, Part-Time	6%
Self-Employed	21%
Other	8%

Thinking of the past three years, that is, since June 2014, how many times have you traveled by air to a destination outside Japan for a leisure trip?



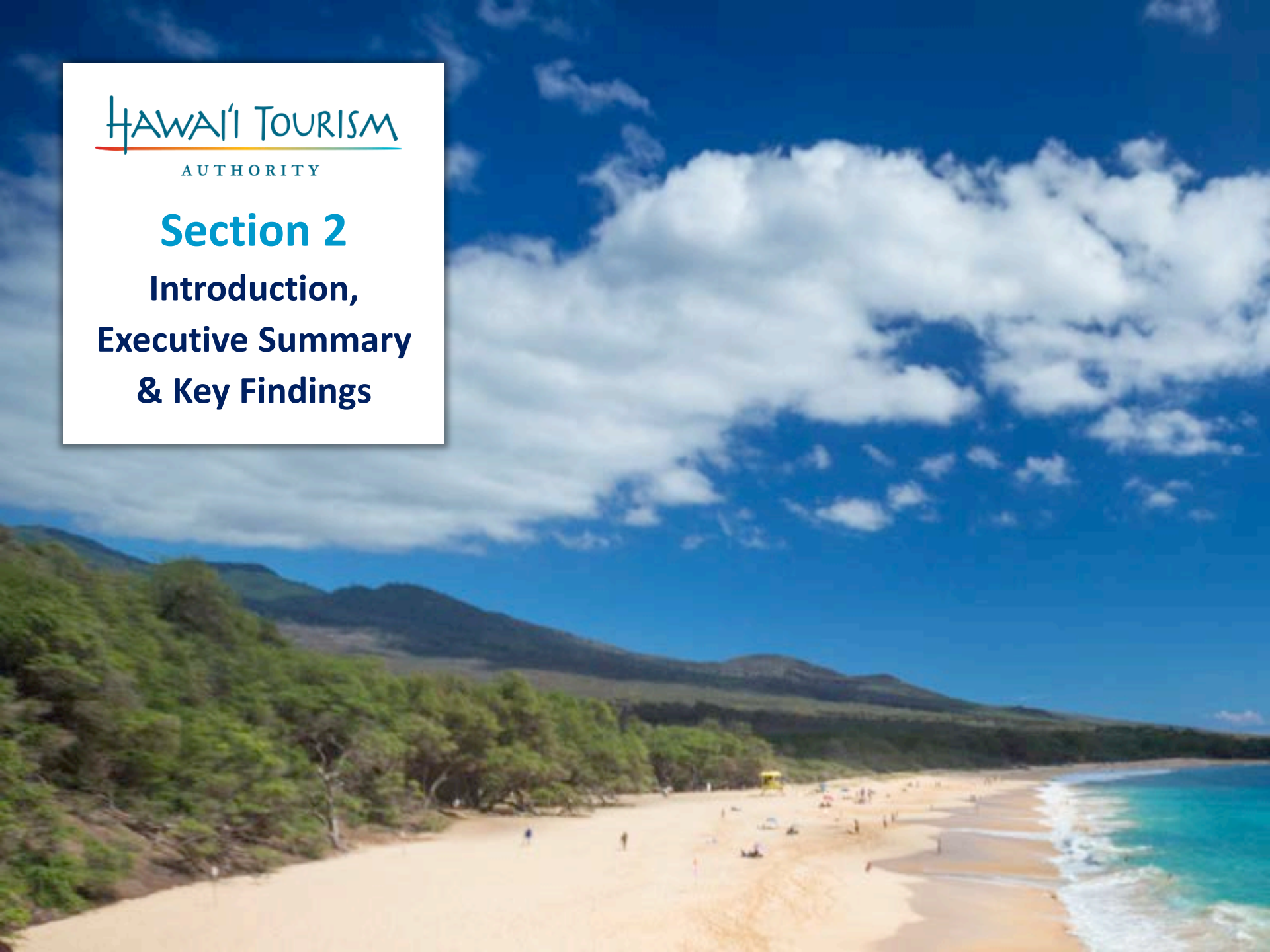
Avg. 3.3 Trips

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Section 2

Introduction,
Executive Summary
& Key Findings





About the LGBT Community in Japan

- Traditionally, Japanese do not have cultural hostility towards LGBT people. Homosexuality has been legal since 1881. The two major religions, Buddhism and Shinto, have no position on sexuality.
- However, the LGBT topic is still a social taboo in Japan. There's little discussion of LGBT issues, and strict family and gender roles usually keep LGBT people in the closet.
- Article 24 of the Japanese Constitution states that marriage "shall be based only on the mutual consent of both sexes." However, since April 2015, Tokyo's Shibuya ward started to recognize same-sex couples in the form of legally nonbinding certificates, which grants same-sex couples the same rights as marriage when it comes to civil matters such as hospital visitation rights. As of August 2017, six cities and city wards have legalized such partnerships.
- The updated Basic Policy for the Prevention of Bullying from the Education Ministry mandates that schools should "prevent bullying of students based on their sexual orientation or gender identity." However, the government refused to include any LGBT contents in the national curriculum.
- New workplace guidance amended in 2017 included coverage about discriminatory language and behavior against LGBT people as being sexual harassment.
- A 2002 law allows transgender people to change their legal gender but only after obtaining sex reassignment surgery.



About the LGBT Community in Japan

- Japan has a long history of LGBT culture content consumption from both LGBT people and the general public. There are many out LGBT celebrities in popular media. Manga comics that focus on same sex romance are easy to find in regular bookstores in Japan. Usually, these books are introductory materials to LGBT issues for Japanese youth, because they can rarely access this information from school education.
- There's a mix of Japanese general public opinion on LGBT issues. A survey conducted by Kyodo News in 2014 indicated that 52% of the respondents disagree or somewhat disagree with legalizing same-sex marriage. Another poll conducted by researchers from universities and the National Institute of Population and Social Security Research in 2015 showed 51% of people back marriage equality. According to a 2016 survey conducted by Japan's LGBT Marketing Lab, 90% of Japanese parents would accept if their children came out as LGBT.
- It's estimated that the market value of Japan's LGBT consumers is between US\$50-70 billion. International corporations like IBM and Goldman Sachs have implemented LGBT inclusive policies in Japan for over a decade. In recent years, local Japanese businesses are embracing the LGBT community, too – big corporations like Rakutan, Sony, Panasonic and Kirin started to recognize same-sex relationships for spousal benefits and foster an inclusive working environment. In 2016, the non-profit group "Work with Pride" introduced a PRIDE Index to evaluate corporate efforts to support inclusiveness for LGBT employees and other sexual minorities.
- Though several openly LGBT politicians have joined the government, the government has been slow in addressing issues faced by the LGBT community on a national level. But as Japan gets ready to host the 2020 Olympic Games, they need to raise awareness and establish programs to ensure that Japan provides a proper and inclusive welcome for tourists.



Executive Summary & Key Findings

Demographic profile of the Japanese LGBT respondents

With a series of recruitment criteria on age, income and travel history, the study collected 260 Japanese LGBT traveler participants for analysis. 60% of the respondents identified as gay or bisexual men, 30% as lesbian or bisexual women, and 10% as transgender, trans men or trans women. The samples had a reasonable distribution among all age groups; 60% were between age 30 and 44. There's a difference in relationship status between men and women. Gay & bisexual men are more likely to be single than lesbian & bisexual women (59% vs. 26%). Respondents mostly came from populated and economically advanced prefectures. Tokyo contributed half (50%) of the respondents. The respondents are also highly educated: 69% of them have at least a college degree. 66% of the respondents are working full-time, 6% working part-time, and 21% are self-employed. The median annual household income of the Japanese LGBT respondents is ¥4,892,085 and the average annual household income is ¥6,026,628.

Past 3 years' travel history vs. next 2 years' travel planning

Japanese LGBT respondents took an average of 3.3 leisure trips outside Japan mainland in the past 3 years with gay & bisexual men (3.6 trips) outperforming lesbian & bisexual women (2.9 trips). The overall top 5 destinations are Taiwan (47%), Thailand (33%), Okinawa (32%), Korea (22%) and Hong Kong (19%). Hawai'i ranked the 6th with a 14% visitation rate. Top destinations that the respondents plan to visit in the next 2 years are in line with their travel history in the past 3 years. 14% of respondents selected Hawai'i as their future destination, making Hawai'i's rank 5th among the destinations tested. Respondents' continued interest in visiting Hawai'i may indicate a steady Hawai'i visitation among LGBT community members in the next few years.



Executive Summary & Key Findings

Perception of LGBT-friendly destinations

With its long-term LGBT-friendly reputation and popularity among Japanese visitors, Bangkok, Thailand was perceived as the most LGBT-friendly destination among all LGBT respondents (75%). With the recent top court's ruling in favor of same-sex marriage, Taipei, Taiwan ranked as the 2nd most LGBT-friendly destination at 60%. The respondents ranked San Francisco, USA (43%) and Amsterdam, the Netherlands (39%) the most LGBT-friendly destinations in the United States and Europe respectively. Other popular LGBT urban destinations in the United States, Europe and Australia received 18% - 30% votes on LGBT-friendliness. Other Eastern Asian cities ranked low. Even Tokyo, the most diverse and economically advanced city in Japan, received LGBT-friendly recognition from only 17% among Japanese LGBT respondents. Though only 14% of the respondents rated Hawai'i as LGBT-friendly, it's still higher than Las Vegas at 10%. It also indicates there is room for Hawai'i to improve its LGBT-friendly image in the years to come.

Travel motivations, destination attributes, attractions and activities

Rest and relaxation (78%) is the most popular reason why Japanese LGBT respondents take vacations. They would also like to experience other cultures (69%) during the trip. So when they are selecting destinations, a sense of relaxation, a place to unwind and get re-energized (71%) is the most important attribute the destination has to offer, accompanied by safety and security (61%). Historic and cultural attractions (48%) are also needed to satisfy their cultural curiosity. No attributes received less than 31% from Japanese LGBT respondents; they see all the attributes as essential to a destination in order to satisfy their vacation motivation. Important attractions and activities to Japanese LGBT respondents include interesting food/cuisine (65%), historic sites and unique landmarks (51%) and beaches (49%).



Executive Summary & Key Findings

Importance of LGBT-related offerings during vacation

Even though 38% of Japanese LGBT respondents selected “LGBT-friendly” as an important destination attribute, when it comes to actual travel, destination trends in Japanese general population are more important than LGBT-friendliness. Hong Kong and Seoul, Korea were not seen as LGBT-friendly destinations by Japanese LGBT respondents, but they are still among the top destinations for both past and future travel. No LGBT-related items topped the list of destination attractions and activities among all Japanese LGBT respondents (LGBT neighborhood at 35% and LGBT events at 13%). However, there’s a big gender difference: Gay & bisexual men are more likely to travel to experience the local LGBT scene (45% vs. 14%) and they are intentionally seeking LGBT neighborhoods (42% vs. 22%) during vacation, which is likely because of the men’s higher percentage of being single. That is to say, when marketing to the Japanese LGBT community, especially gay & bisexual men, it’s recommended to emphasize on the local LGBT community and infrastructure.

Most recent vacation to any destination

In the survey, we gauged Japanese LGBT respondents’ most recent vacation outside Japan. Last vacation destinations are mostly in line with the results of the past 3 years’ travel history; top Asian destinations include Taiwan (20%), Thailand (10%) and Korea (7%). Of note, 13% of respondents reported visiting any destination in continental USA which was not assessed in the past 3-year destination list. Hawai’i ranked the 4th in the overall list with a strong 8% visitation rate. Respondents tend to take shorter vacations. On average, they spent 4.6 nights during the last trip, while 61% spent only 2-4 nights. The respondents are unlikely to travel in big groups – 86% of them travel either alone or with a partner. That’s to say, it’s important to emphasize destination offerings to singles and couples when marketing to the Japanese LGBT community. Direct reservation with airline/hotel (42%) and online booking with OTAs (40%) are the most popular methods for Japanese LGBT respondents in booking their most recent vacation. 17% of participants used package tours and airfare, and accommodations were included in almost all packages. For lodging, 80% of respondents reported staying at hotels. The average spending per person during that last vacation is ¥146,165 (approx. US\$1,320), a quite strong number considering the short stay during the last vacation.



Executive Summary & Key Findings

Japanese LGBT respondents' past visit to Hawai'i

Impressively, 43% of Japanese LGBT respondents have visited Hawai'i since their adulthood and among them, 33% visited Hawai'i in the past 3 years. The respondents tend to spend short vacations in Hawai'i too, despite flights taking 6-8 hours. They reported an average 5.0 nights' stay, with 72% having spent 3-5 nights in Hawai'i. With strong Japanese influence, especially in the Waikiki area, 77% of Japanese LGBT respondents visited O'ahu Island, followed by Hawai'i Island at 32% and Maui at 10%. Very few Japanese respondents visited other islands in Hawai'i, which is quite in line with the general Japanese visitors. For those who have never visited Hawai'i since adulthood and those who have visited Hawai'i but not in the past 3 years, the prevalent reasons are "financial reasons/travel costs" (31%), "better value at another destination" (27%) and "not enough time to travel" (25%). LGBT-related reasons didn't contribute to the respondents' non-visits: Only 5% of these non-travelers indicated "Not enough LGBT-dedicated activities" in Hawai'i and only 3% of them indicated that "Hawai'i is not an LGBT-friendly destination."

Japanese LGBT respondents' perception on Hawai'i

In general, Japanese LGBT respondents perceive Hawai'i as an ideal vacation destination. They agree that "Hawai'i offers great beaches" (70%), "Hawai'i provides a sense of relaxation, a place to unwind, and get re-energized" (63%) and "Hawai'i is a safe and secure place" (50%), which perfectly match the respondents' criteria on destination attributes. However, areas that we should pay attention to are that only 11% of respondents perceive "Hawai'i as a good value for the money," 8% indicated "It's easy to meet other LGBT people in Hawai'i," and only 6% considered "Hawai'i is fun for singles." With tepid economic growth in Japan in the past two decades, consumers tend to be thrifty in spending, especially the millennial generation. It's important for Hawai'i to recognize the trend and emphasize local deals and discount offerings when outreaching to the Japanese LGBT community. We've acknowledged Japanese gay & bisexual men's high percentage of being single and they are looking for LGBT neighborhoods at a destination in previous sections, so it's recommended to include Hawai'i's local LGBT community and its offerings for singles when marketing to the gay & bisexual men community in Japan.



Executive Summary & Key Findings

Gender differences

Historically, there is gender inequality in Japanese society. In the World Economic Forum's 2016 Global Gender Gap Index, Japan ranked 111th out of the 144 countries. Full-time female workers made 73% of what men made in 2016 according to the labor ministry survey. The gender pay gap explained the limited participation from the lesbian & bisexual women community, especially women who are single or not living with a partner. In addition, it helps us better understand the travel behavior differences between men and women. We had only 25 qualified responses from the transgender community, and the number is not significant enough to generate valid conclusions about this group.

53% of lesbian & bisexual women are living with a partner, engaged or gained legal status compared to 14% among gay & bisexual men. That is to say, lesbian & bisexual women who meet the minimum income requirement are more likely to be coupled and possibly living in dual-income households. And it also indicates that women are more likely to travel with their partners than gay & bisexual men, and seeking opportunities to connect with spouse or partner during travel (65% vs. 27%). They are also more serious foodies compared to gay & bisexual men: 62% of them travel to "indulge my passion for food and find cuisine" (vs. 49% men) and 72% of them rated "interesting food/cuisine" as an important attraction/activity when selecting a vacation destination (vs. 60% men). Gay & bisexual men took more trips than lesbian & bisexual women in the past 3 years (3.6 trips vs. 2.9 trips) and they tend to have positive impressions of urban destinations' LGBT friendliness. They also travel for LGBT reasons: 45% of them travel "to experience the local LGBT scene on vacation" (vs. 14% women) while "vibrant nightlife" (43% vs. 18%), "LGBT neighborhood" (42% vs. 22%), and shopping (41% vs. 24%) are important attractions/activities for them when selecting a vacation destination.

Hawaii has established a fan base, and a potential to develop further among Japanese lesbian & bisexual women. There's a higher percentage of visitation from lesbian & bisexual women than gay & bisexual men (21% vs. 13%) in the past 3 years, which might be because of their relationship status and interest in connecting with their partner during travel. 32% of women already perceive Hawaii as romantic. In addition, lesbian & bisexual women had a more favorable opinion on Hawaii being an LGBT-friendly destination than gay & bisexual men (19% vs. 11%). But single gay & bisexual men shouldn't be left out. Waikiki's nightlife and gay infrastructure should be emphasized to appeal to single men.



Outreach Recommendation

LGBT-specific websites: 49% of Japanese LGBT respondents view LGBT-specific websites, either news or entertainment, on at least a weekly basis. Only 10% of them never visit these websites at all.

Same-sex mobile apps: 80% of gay and bisexual men use same-sex dating mobile apps on at least a weekly basis; 57% reported using dating apps every day.

Travel inspiration and booking: Top sources where Japanese LGBT respondents look for destination information were online booking sites (79%), airline websites/mobile apps (57%), and hotel website/mobile apps (33%).

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Section 3

Competing Destinations






LGBT Visitation by Demographic: Taiwan, Thailand and Japan’s Okinawa Island are the most popular destinations among Japanese LGBT respondents in the past 3 years, followed by Korea and Hong Kong. 14% of respondents visited Hawai’i in the past 3 years, which is on par with Vietnam, Singapore and China. There is a potential gender difference in Hawai’i visits: 21% lesbian & bisexual women visited Hawai’i in the past 3 years while 13% of gay & bi sexual men did so.



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


	All LGBT	Gay & Bi Men	Lesbian & Bi Women
Taiwan	47%	55%	35%
Thailand	33%	38%	18%
Okinawa	32%	29%	40%
Korea	22%	24%	17%
Hong Kong	19%	24%	12%
 Hawai’i , USA	14%	13%	21%
Vietnam	14%	16%	14%
Singapore	14%	18%	8%
China	13%	17%	4%
Philippines	11%	8%	15%
Malaysia	10%	11%	8%
Guam	9%	9%	12%
Canada	8%	9%	8%
Bali	8%	10%	4%
Australia	7%	9%	5%
Saipan	7%	8%	5%
Other	40%	43%	40%



Future LGBT Visitation by Demographic: Top destinations the respondents are willing to travel to are consistent with their travel history in the past 3 years. At 14%, Hawai'i is the 5th most desirable destination among all the LGBT respondents.



Of the same destinations, which of the following do you plan to visit in the next two years?

	All LGBT	Gay & Bi Men	Lesbian & Bi Women
Taiwan	40%	48%	24%
Okinawa	35%	33%	38%
Thailand	28%	32%	14%
Korea	16%	21%	9%
 Hawai'i , USA	14%	15%	15%
Hong Kong	12%	14%	6%
Singapore	10%	13%	3%
Canada	9%	11%	4%
Australia	8%	11%	5%
Bali	8%	9%	9%
Vietnam	8%	6%	13%
China	8%	9%	6%
Guam	7%	5%	9%
Malaysia	7%	6%	6%
Philippines	5%	4%	6%
Saipan	4%	6%	3%
None of the above	23%	18%	31%



LGBT-Friendly Rating: Bangkok and Taipei were considered to be the most LGBT-friendly destinations among Japanese LGBT respondents. Though Hawai'i's ranking was lower compared to international cities, their rating was better than some popular Asian destinations like Hong Kong and Seoul.



**Which of the following destinations do you consider to be LGBT-friendly?
Please select based on your personal experience or your impressions from what you have read or heard.**

	All LGBT	Gay & Bi Men	Lesbian & Bi Women
Bangkok, Thailand	75%	78%	69%
Taipei, Taiwan	60%	72%	47%
San Francisco, USA	43%	50%	35%
Amsterdam, the Netherlands	39%	39%	44%
New York, USA	30%	31%	31%
Sydney, Australia	30%	36%	21%
Los Angeles, USA	27%	25%	33%
London, UK	24%	25%	22%
Berlin, Germany	21%	24%	17%
Paris, France	20%	22%	17%
Madrid, Spain	18%	22%	14%
Tokyo, Japan	17%	22%	9%
Hawai'i, USA	14%	11%	19%
Hong Kong	10%	13%	4%
Las Vegas, USA	10%	7%	14%
Seoul, Korea	5%	6%	3%
None of the above	2%	1%	1%

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Section 4

LGBT Travel Motivations

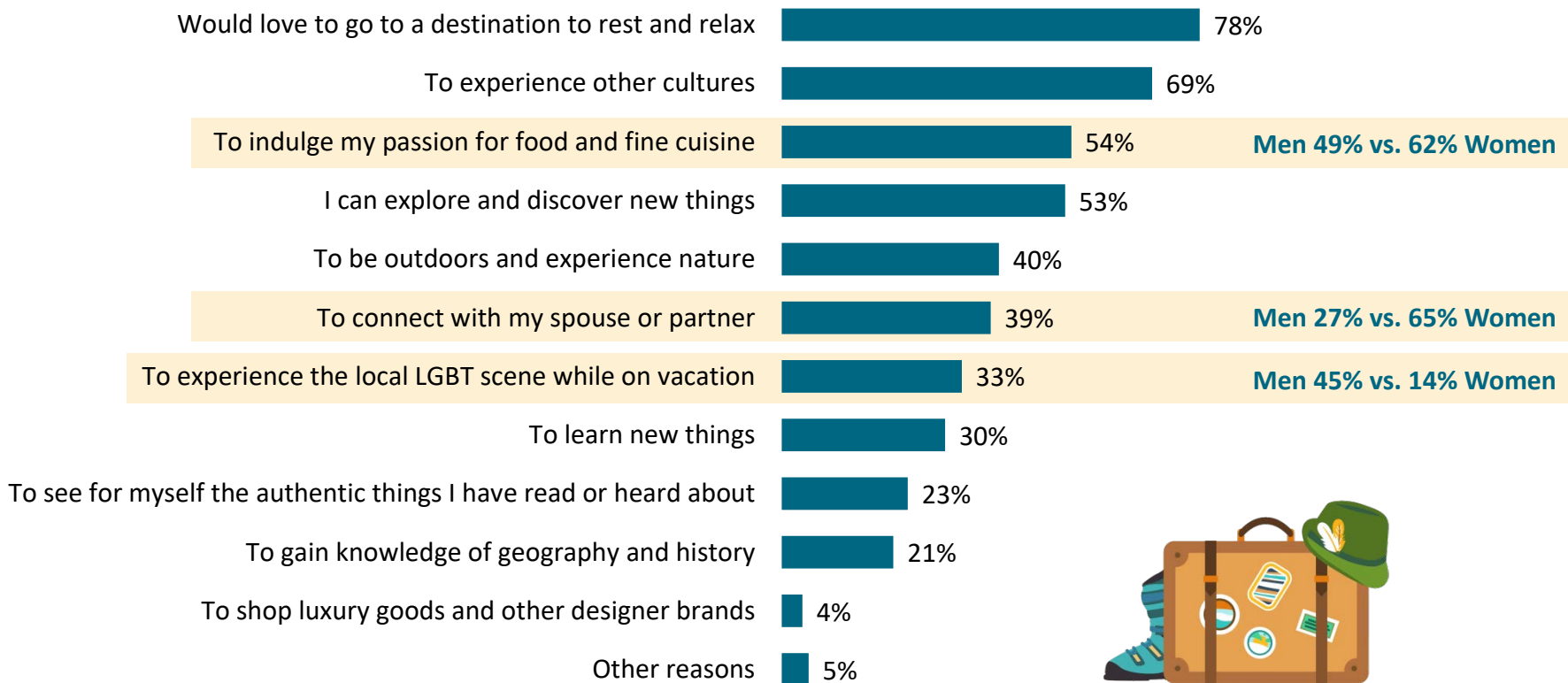




Vacation Motivation: The most important motivations for Japanese LGBT respondents to take vacations were rest and relaxation, experience other cultures food and fine cuisine, and explore & discover new things. To connect with spouse or partner was a more important motivator for women (65% vs. 27%); while local LGBT scene was more important for gay and bi men (45% vs. 14%).



**Of the following reasons, which best describe why you take vacations?
(Please select all your top reasons you take vacations.)**





International Destination Attributes: None of the attributes provided were seen as not important for Japanese LGBT respondents when selecting a vacation destination outside Japan. A sense of relaxation, safety and security and history and culture were the most important, while LGBT-friendliness was of moderate importance.



When choosing a vacation outside Japan, which of the following attributes are most important to you in a destination? (Please check all that apply)

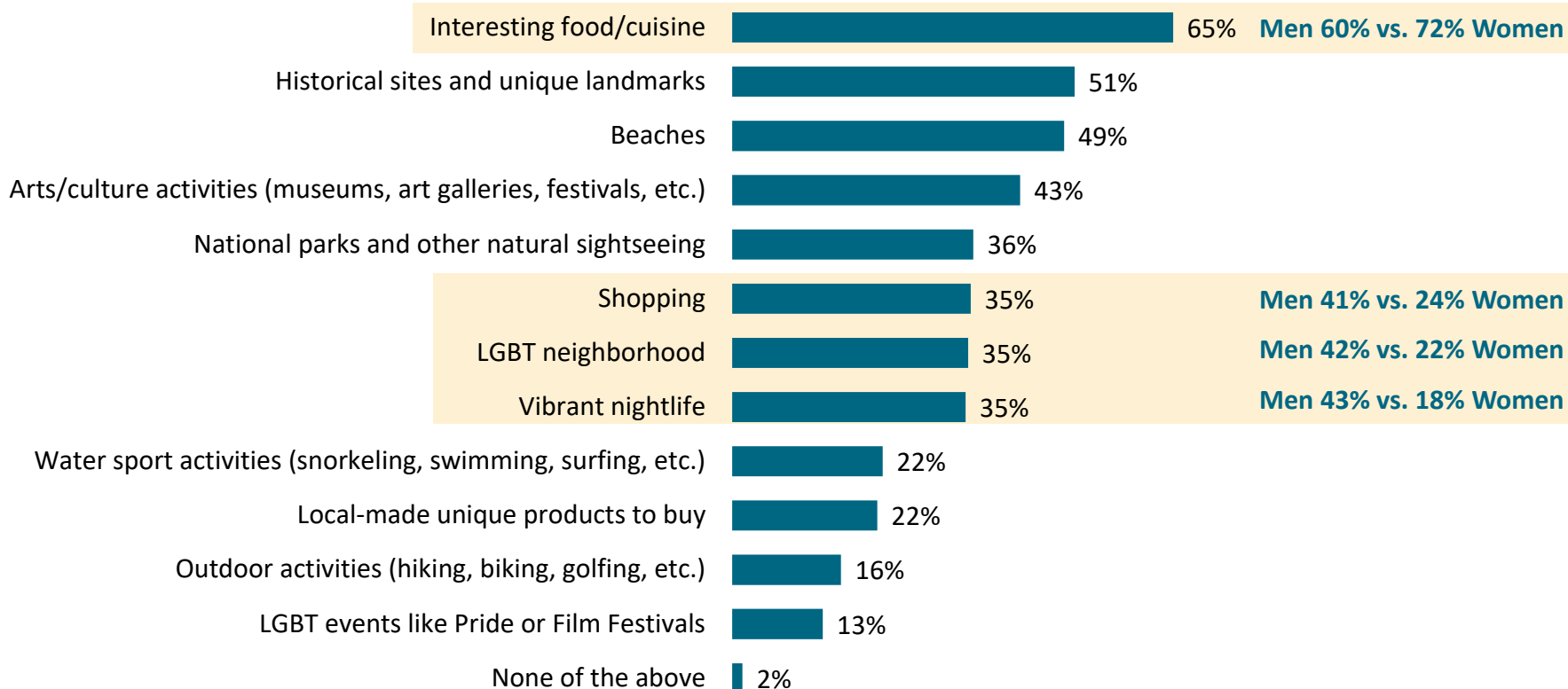




International Destination Attractions and Activities: Like their LGBT counterparts from other Asian target markets, Japanese LGBT respondents ranked interesting food/cuisine at the top. Historical sites and unique landmarks, beaches and arts/culture activities were also among the top activities for both men and women. Gay & bisexual men were more interested in shopping, LGBT neighborhoods and vibrant nightlife than lesbian & bisexual women. In addition, Japanese LGBT respondents were more favorable to LGBT neighborhoods than LGBT events, which is just the opposite to LGBT respondents in mainland China and Taiwan.



When selecting a vacation destination outside Japan, which of the following attractions and activities are most important to you? (Check all that are most important to you)

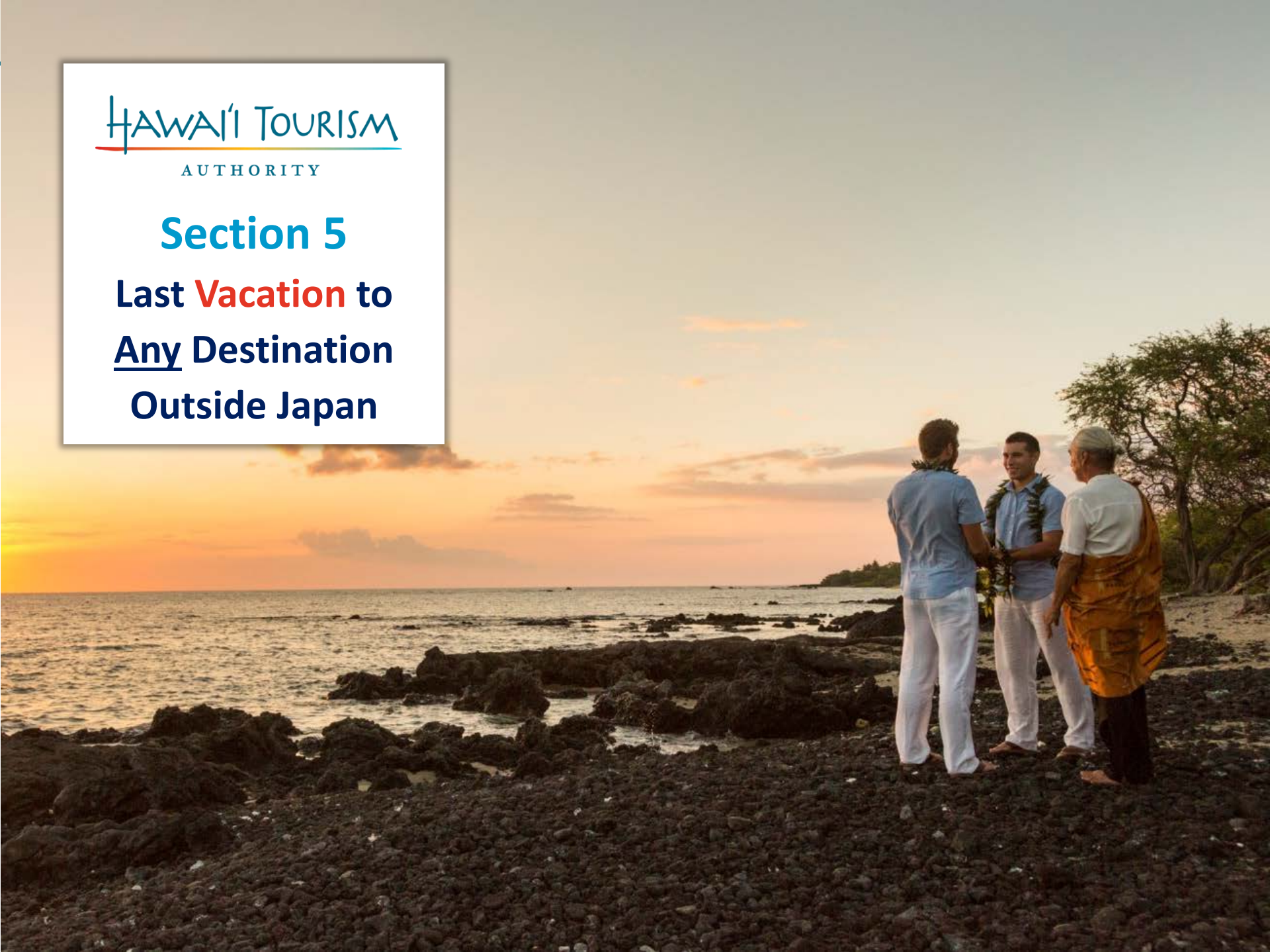


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Section 5

Last **Vacation** to
Any Destination
Outside Japan



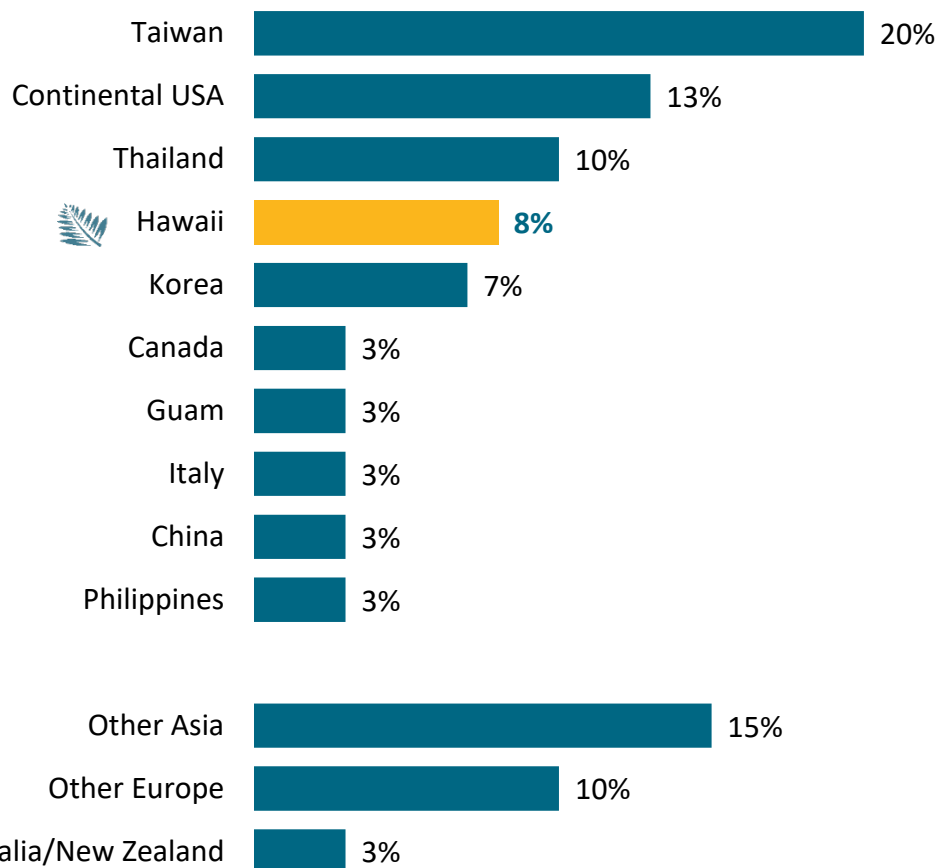


Vacation Destinations Outside Japan: 20% of Japanese LGBT respondents visited Taiwan during their last vacation outside Japan; any destination in continental USA ranked the second with a 13% visitation rate. Hawai'i ranked the 4th with an 8% visitation rate, which is only 2% short from Thailand but ahead of Korea by 1%.



Think back to last time you took a vacation outside Japan. Please write the destination in which you traveled to.

Any destination in:

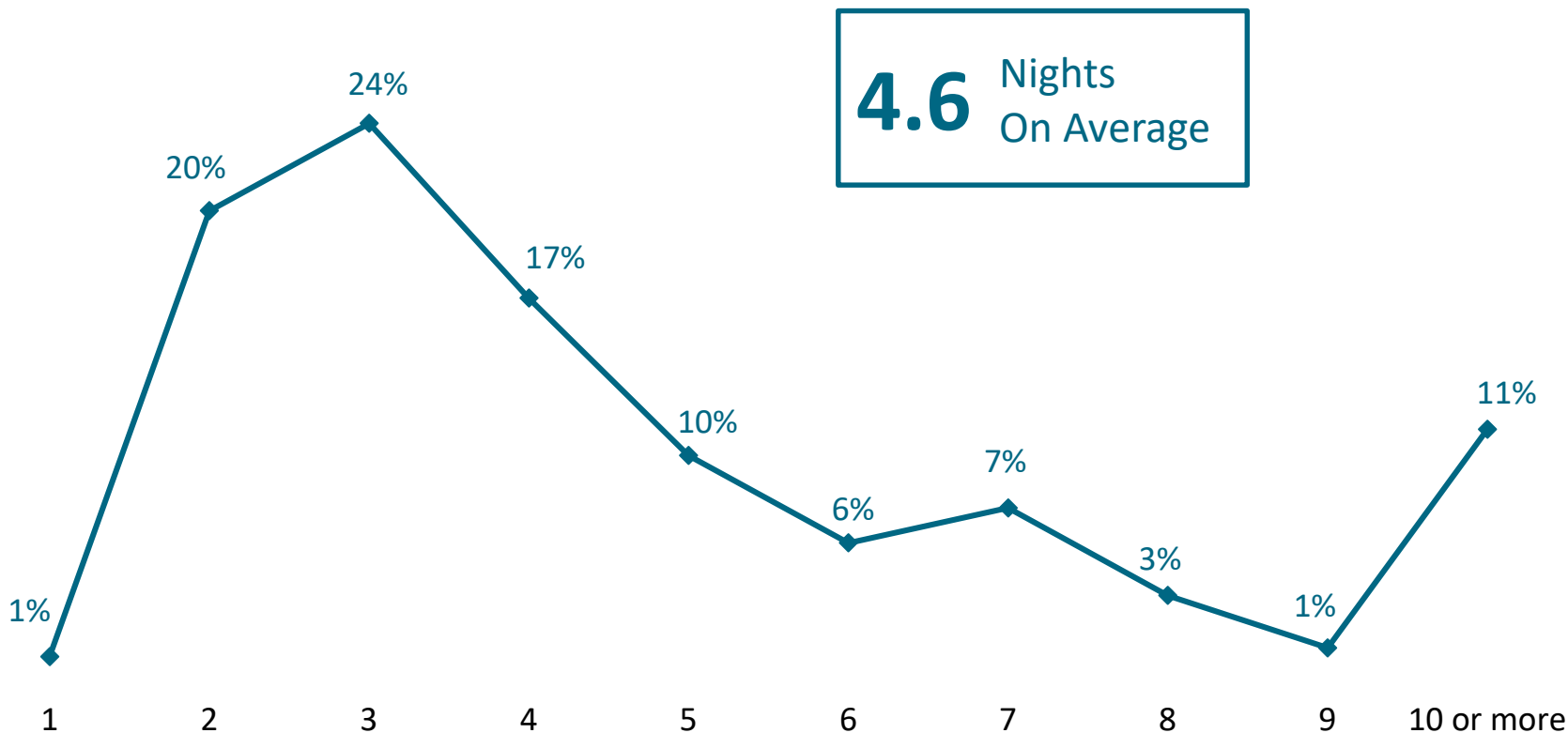




Vacation History Outside Japan: On average, Japanese LGBT respondents spent 4.6 nights during their last trip outside Japan. They are in favor of short vacations: 61% of them spent 2 to 4 nights on the last trip.



**We have a few questions about that trip to [destination name].
How many nights did you spend during the above trip?**





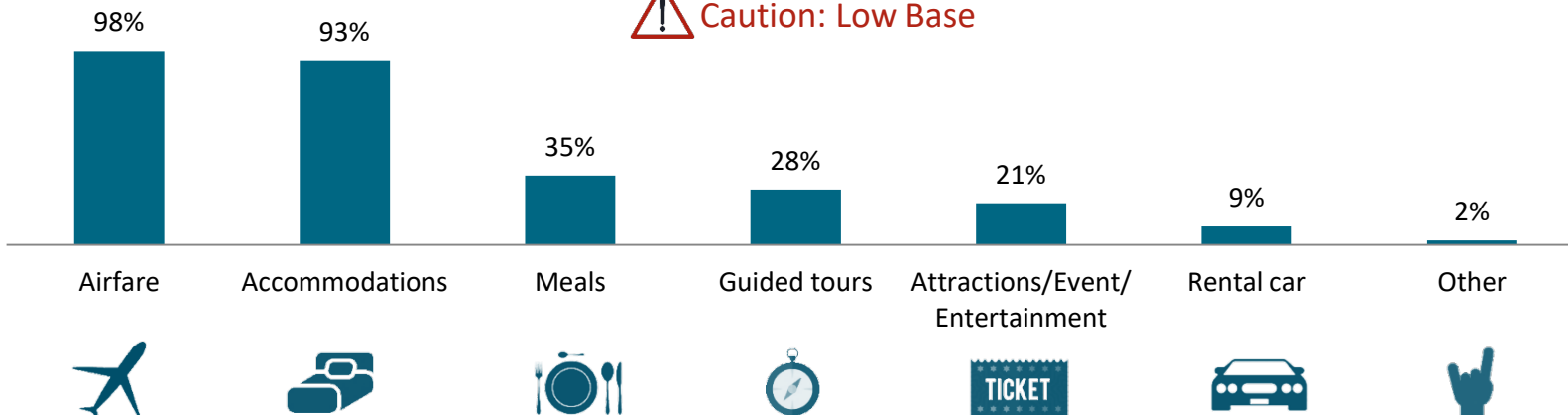
Booking Method for Last Vacation Outside Japan: Direct booking with airline/hotel (48%) is the most popular booking method among gay & bisexual men, while online booking through OTA (35%) is popular among lesbian & bisexual women. Only 17% of the respondents booked through package tours, and airfare and accommodations were included in almost all such packages.

Which of the following booking methods did you use to book your last vacation? (Please mark all that apply.)

	All LGBT	Gay & Bi Men	Lesbian & Bi Women
Airline/Hotel Direct Reservation	42%	48%	29%
Online Booking (i.e. Expedia, Rakuten Travel)	40%	41%	35%
Package Tour	17%	10%	27%
Other	14%	14%	13%

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

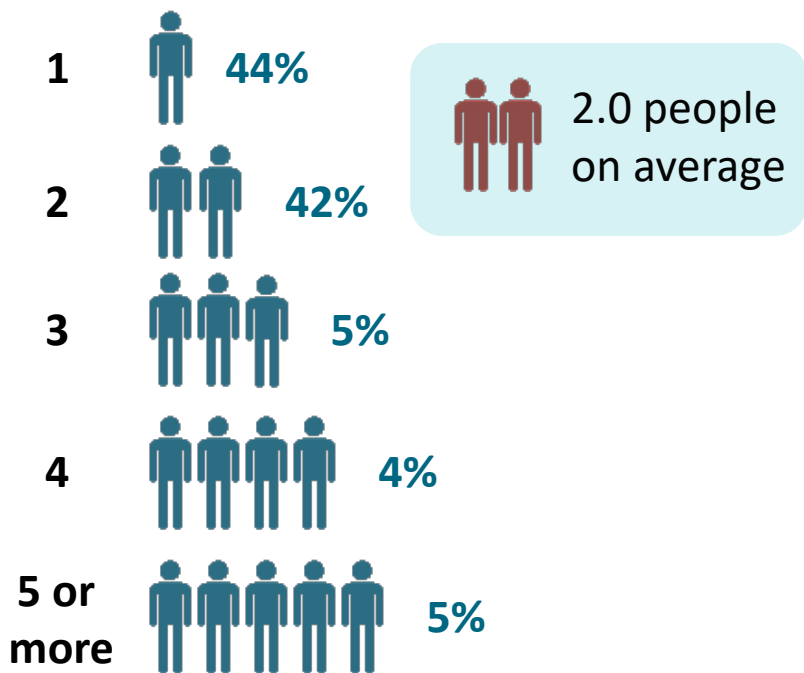
Caution: Low Base





Number of People and Average Spending for Last Vacation Outside Japan: Japanese LGBT respondents are unlikely to travel outside Japan in a party of more than 2 people. 44% reported traveling by themselves on the last trip, and 42% traveled with another person. The average spending per person on the last trip with pre-paid packages included is ¥146,165 (approx. US\$1,320).

of People on Trip



Total Average Spending (Per Person)

¥146,165

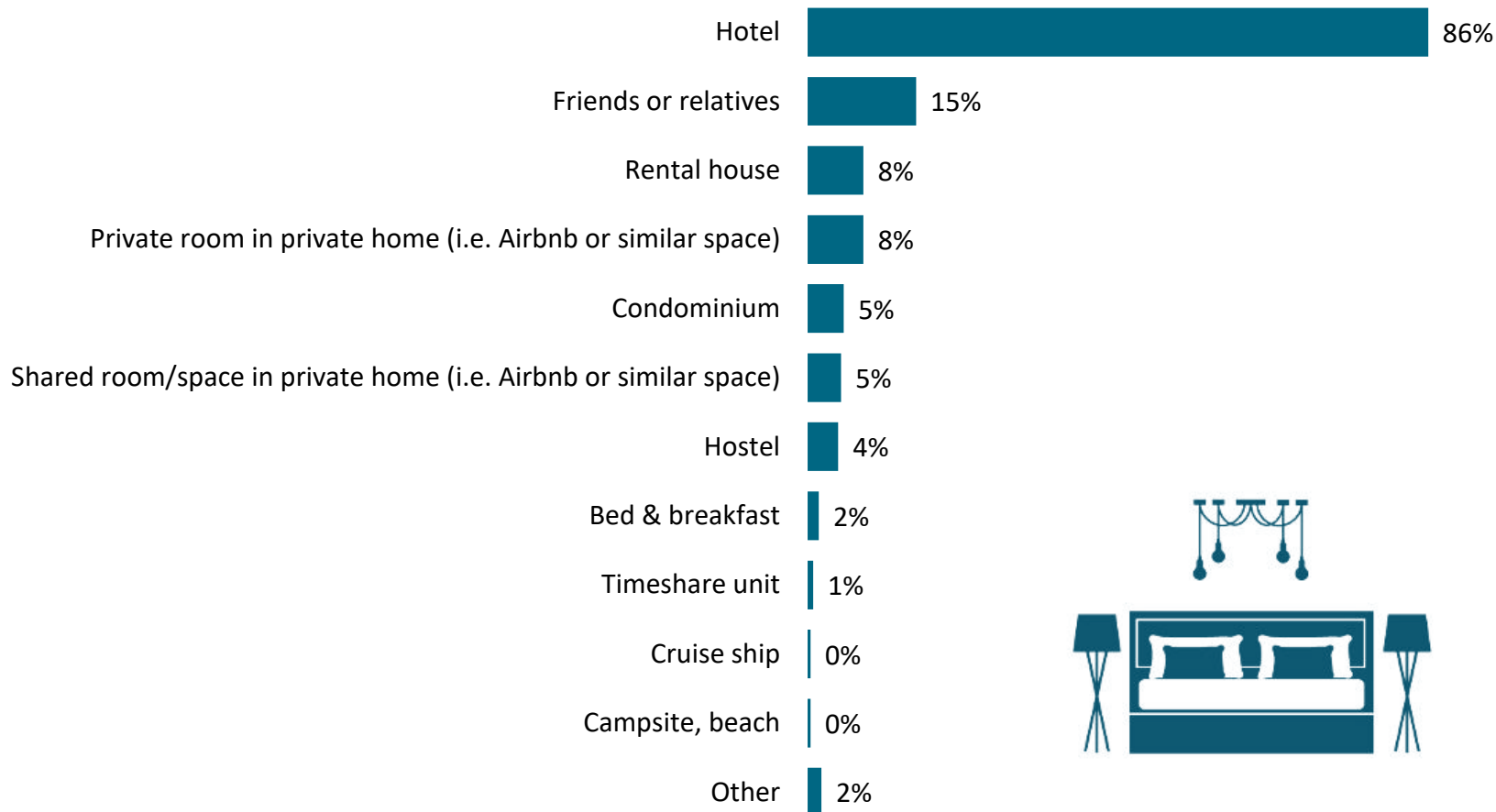




Accommodation for Last Vacation Outside Japan: Like their counterparts in other Asian target markets, most Japanese LGBT respondents preferred traditional hotel accommodations.



During the trip to [destination name], where did you stay?



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Section 6
LGBT Hawai'i
Travel

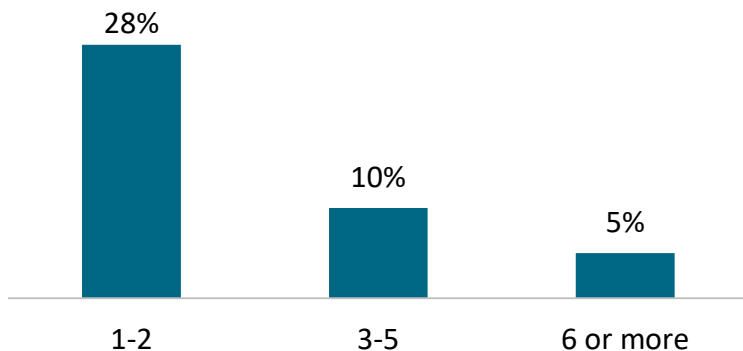




Hawai'i Visitation: 43% of Japanese LGBT respondents have visited Hawai'i since they were 18 years old. Among the Hawai'i visitors, about a third (35%) visited Hawai'i three or more times. 57% of the Japanese LGBT respondents have never visited Hawai'i in adulthood, which indicates potential growth for Hawai'i visitation in the years to come.



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



43% Have visited Hawai'i as an adult

57% have never visited Hawai'i in adulthood

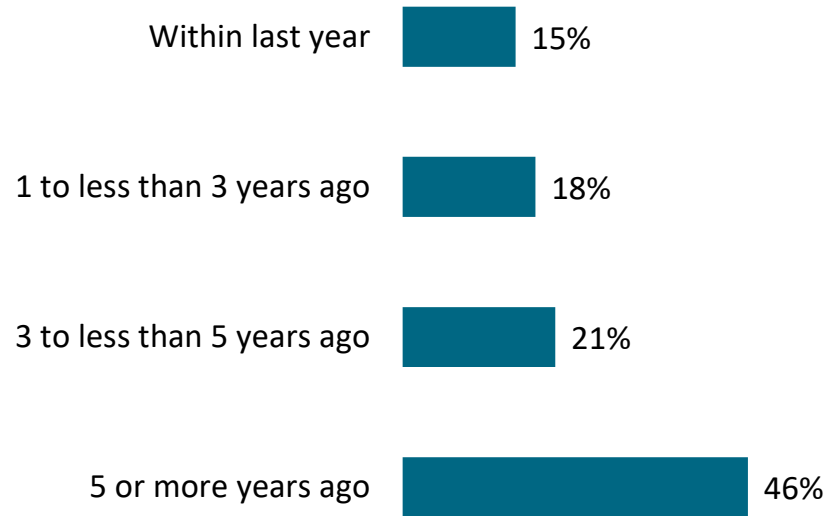




Hawai'i Visitation: Among those who have ever visited Hawai'i in adulthood, 33% indicated their last visit was within the past three years.



When is the last time you have visited Hawai'i?



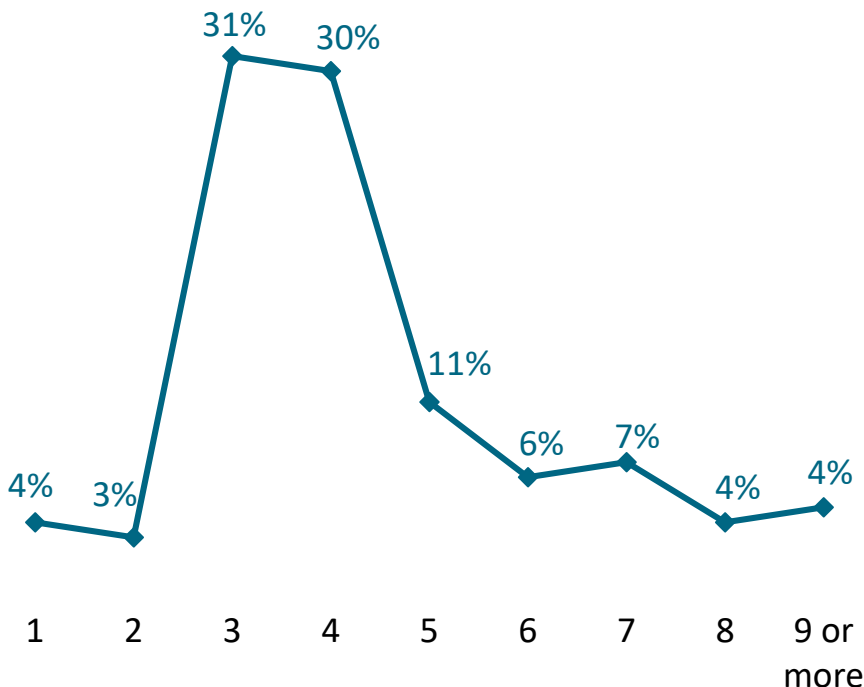


Hawai'i Visitation: In line with the trend that Japanese LGBT respondents tend to take short trips, 72% of Hawai'i visitors spent three to five nights during their last trip to Hawai'i. O'ahu is the most popular island among visitors, followed by the Island of Hawai'i and Maui. Other Hawaiian islands were rarely visited by Japanese LGBT visitors.

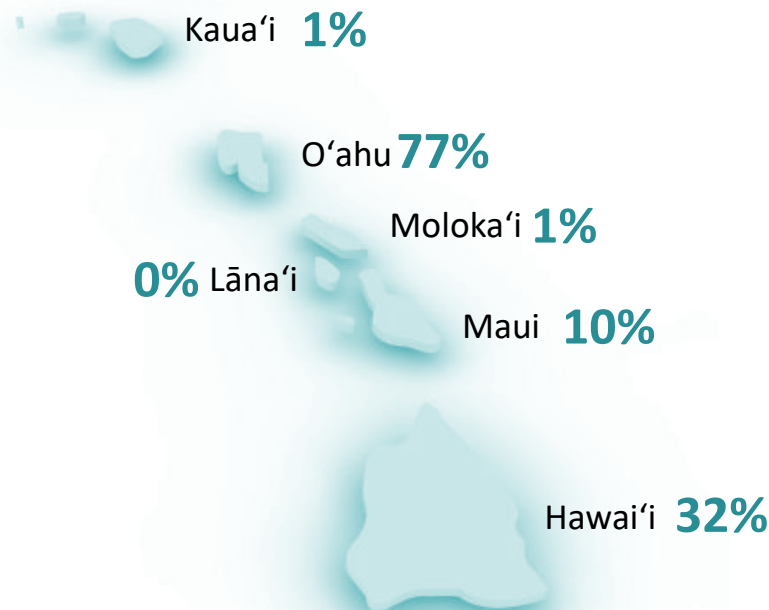


On your last trip to Hawai'i, how many nights was this?

Average Number: 5.0 nights



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

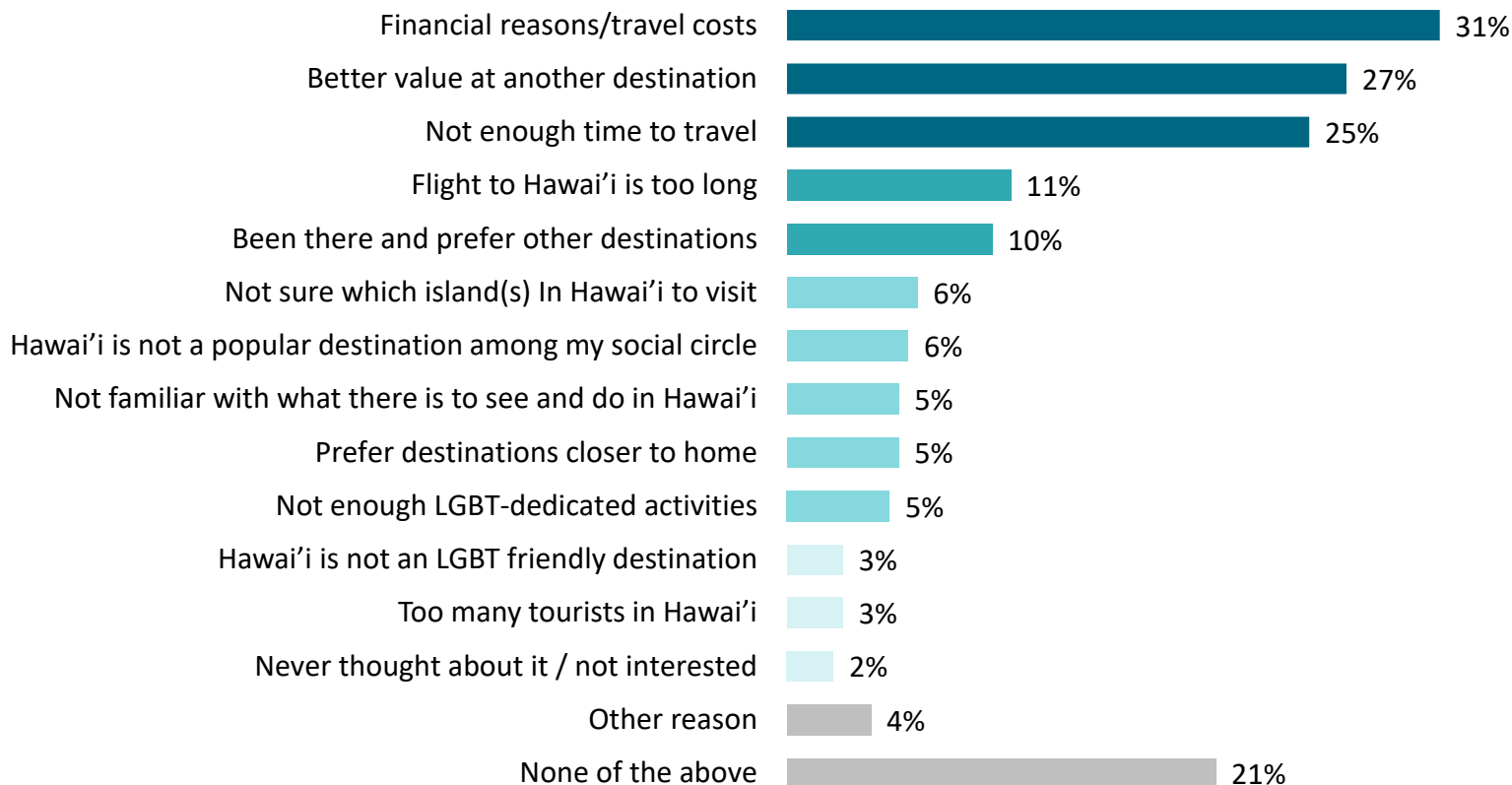




Reasons for not visiting Hawai'i in the past 3 years: Among Hawai'i non-visitors in the past three years, financial reasons, better value at another destination, and not enough time to travel are the main reasons that they didn't visit Hawai'i. LGBT-related reasons only scored between 3% to 5%, and are not considered important reasons leading to non-visitation.



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

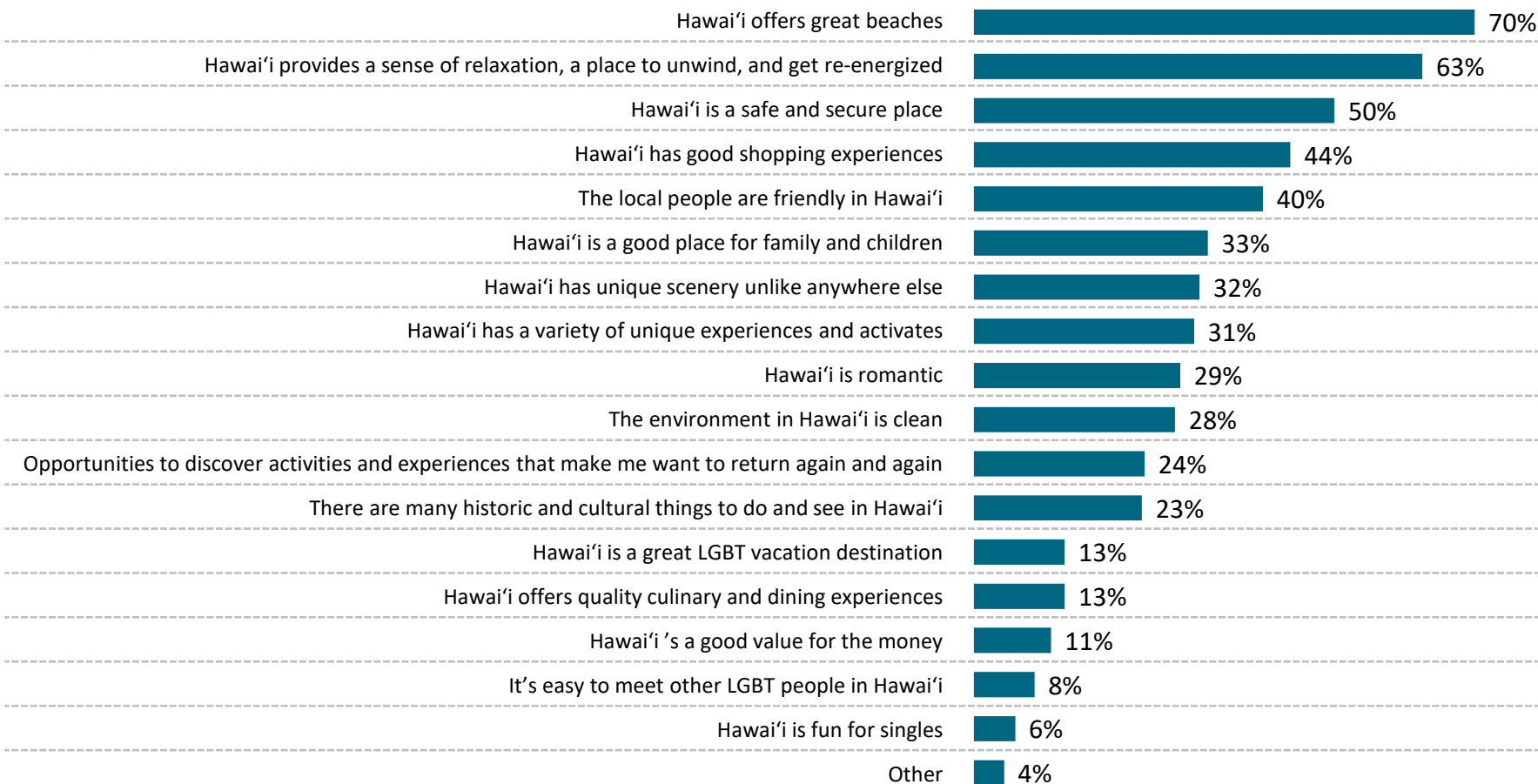




Hawai'i Attributes: Popular perceptions about Hawai'i from Japanese LGBT respondents are: Offers great beaches, a sense of relaxation and a safe and secure place. The least popular perceptions are fun for singles, easy to meet other LGBT people in Hawai'i and good value for money.



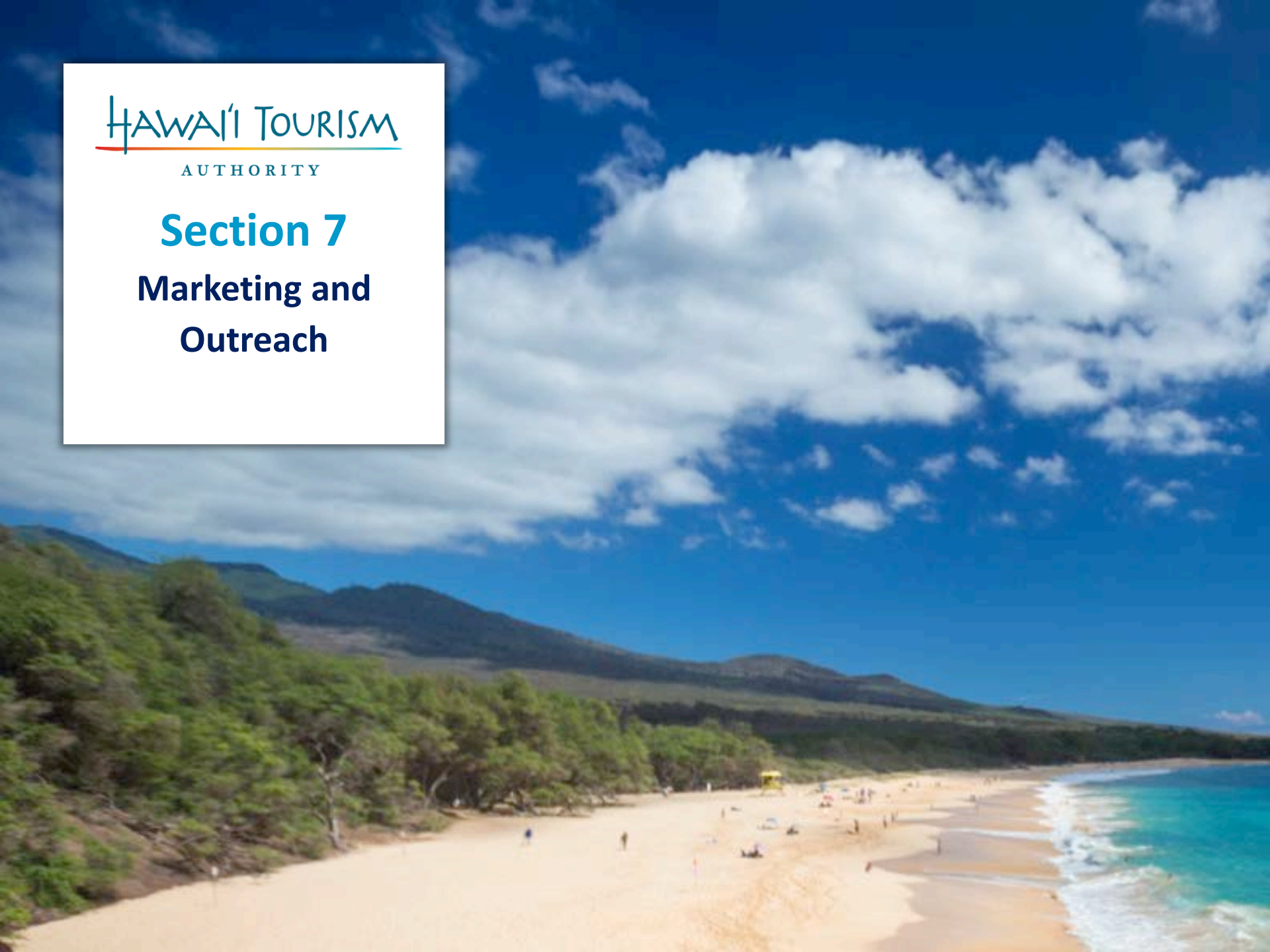
Below are some attitudes in regards to traveling to Hawai'i. Regardless of whether you have visited Hawai'i, do you personally agree with these statements? I agree that.....





Section 7

Marketing and Outreach

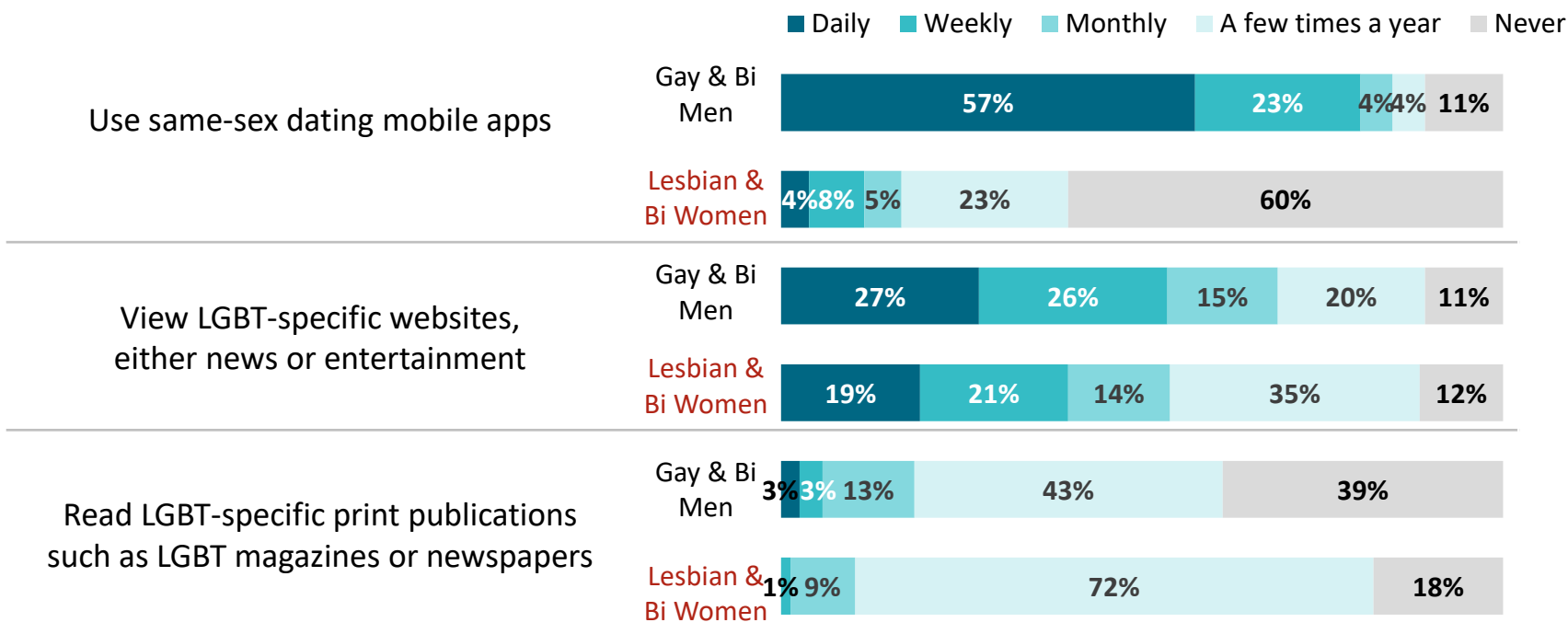




Media Planning Chart



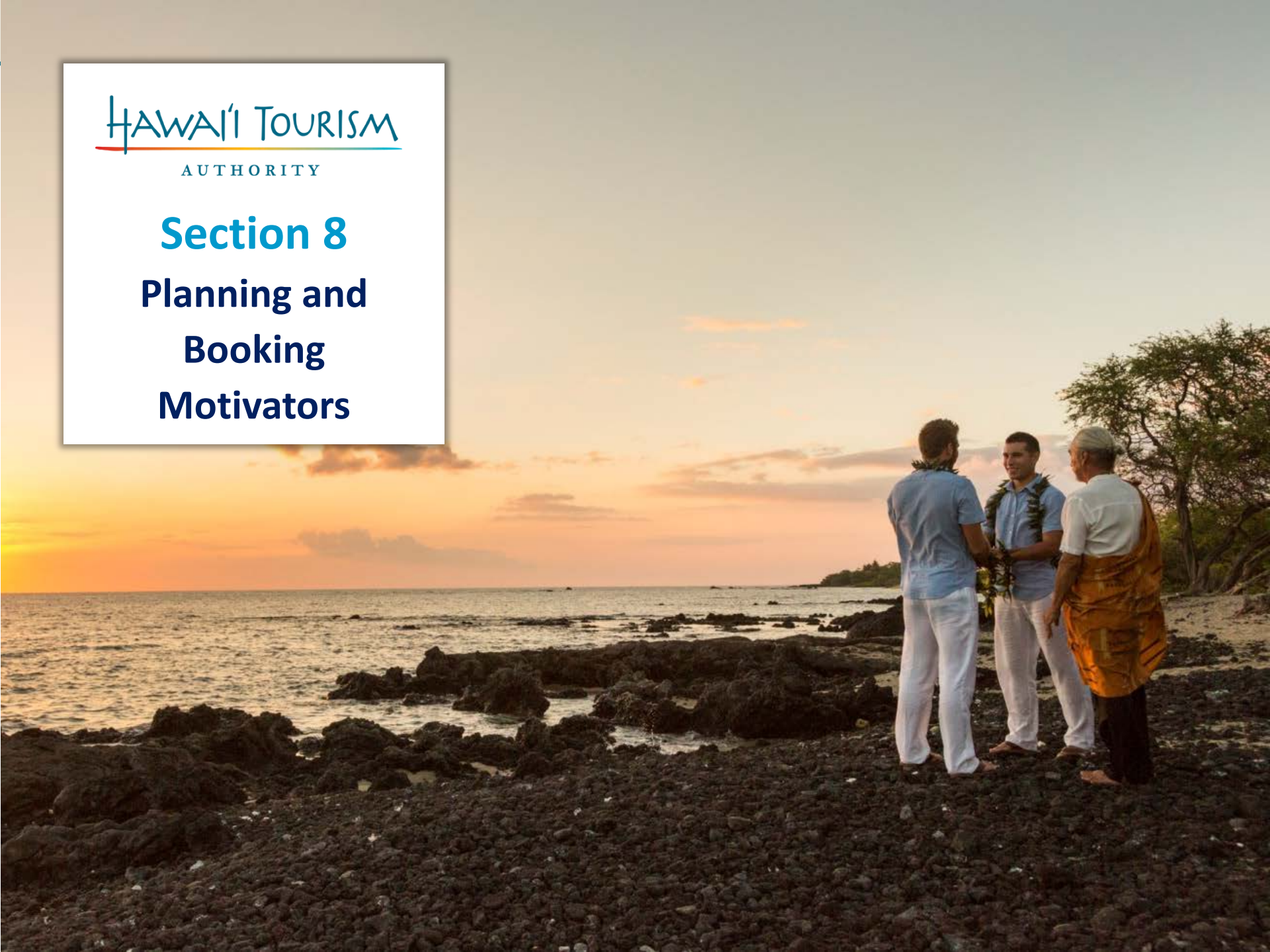
How often do you.....



HAWAII TOURISM

AUTHORITY

Section 8
Planning and
Booking
Motivators





Travel Planning Chart: Inspiration or motivation



Do you use any of the following for travel inspiration or booking to a travel destination? (Check all that apply)

	All LGBT	Gay & Bi Men	Lesbian & Bi Women
Online booking sites (e.g. Expedia, Rakuten)/mobile app	79%	76%	81%
Airline website/mobile app	57%	66%	47%
Hotel website/mobile app	33%	39%	27%
Travel agent	25%	20%	33%
Recommendations from friends or relatives	25%	24%	26%
Destination website	21%	19%	24%
Travel guide books	20%	17%	28%
Social media (e.g., Facebook, Instagram, Pinterest)	19%	15%	23%
Travel apps	11%	14%	6%
Mainstream travel websites or blogs	8%	8%	9%
Adventure/outdoor/travel magazines	7%	6%	9%
LGBT websites or blogs	7%	6%	6%
Television/Radio	5%	4%	5%
LGBT magazines	2%	1%	1%
None of the above	3%	4%	1%



Mahalo...

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