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Reaching LGBT Travelers: Taiwan Report

*Profile of Taiwanese
International Visitors*

May 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, 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.



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Section 1

Research Methodology





Methodology and Understanding the Report

In April 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 Taiwan. Participants were invited through major Taiwanese 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 ten NT\$1,000 cash prizes was provided to encourage participation in the study.

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

- Identifies as a member of the LGBT community
- Age 25 or over
- Annual household income over NT\$600,000
- Took at least one leisure trip outside Taiwan 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 survey did not collect enough qualified lesbian & bisexual women (n=69) to make the number significant. The "All LGBT data" trends male and the female results are directional.

The survey has a margin of error of ±4.55% at a 95% level of confidence.

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.



Taiwan LGBT Research Respondent Profile (N=464)

Significantly more gay and bisexual men participated in the study than did lesbian and bisexual women. 83% of the respondents were under the age of 40. The median annual household income is NT\$837,500. Top provinces and cities were populous areas like Taipei City and New Taipei City.

Identity



Gay & Bi Men 83%



Lesbian & Bi Women 15%

Transgender 2%

Age

25-29 35%

30-34 28%

35-39 20%

40 or more 17%

Monthly Household Income

NT\$600,000 – NT\$699,999 24%

NT\$700,000 – NT\$799,999 12%

NT\$800,000 – NT\$899,999 8%

NT\$900,000 – NT\$999,999 8%

NT\$1,000,000 or more 27%

Prefer not to answer 22%

Top Provinces and Cities

Taipei City 26%

New Taipei City 25%

Taichung City 14%

Kaohsiung City 10%

Taoyuan City 9%

Tainan City 5%

*Participants were from 19 cities and counties. Hualien County, Lienchiang County, Kinmen County and Penghu County were not represented.



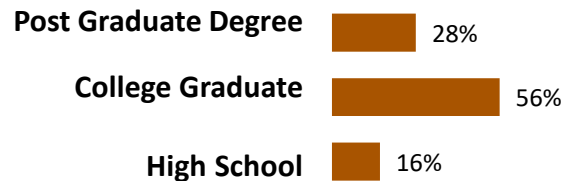
Taiwan LGBT Research Respondent Profile (N=464)

77% of respondents are currently single or dating a same-sex partner, which is high compared to other markets in this project. This result was likely due to the media partners and social media who were used to promote the survey. It's a very highly educated group of individuals; for example, 84% obtained at least a bachelors degree. In addition, 89% of the respondents were either employed by others or self-employed. On average, the respondents reported taking 3 trips outside Taiwan in the past 3 years.

Relationship

Single or dating a same-sex partner	77%
Living with a same-sex partner	19%
Married	2%
Other	2%

Education



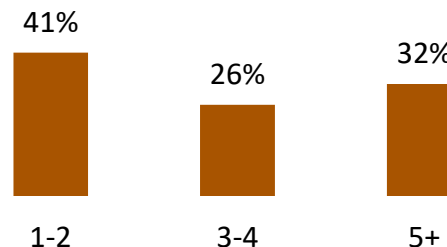
Children

1% Have children under age 18

Employment

Employed, FT/PT	80%
Self-Employed	9%
Student	4%
Other	7%

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



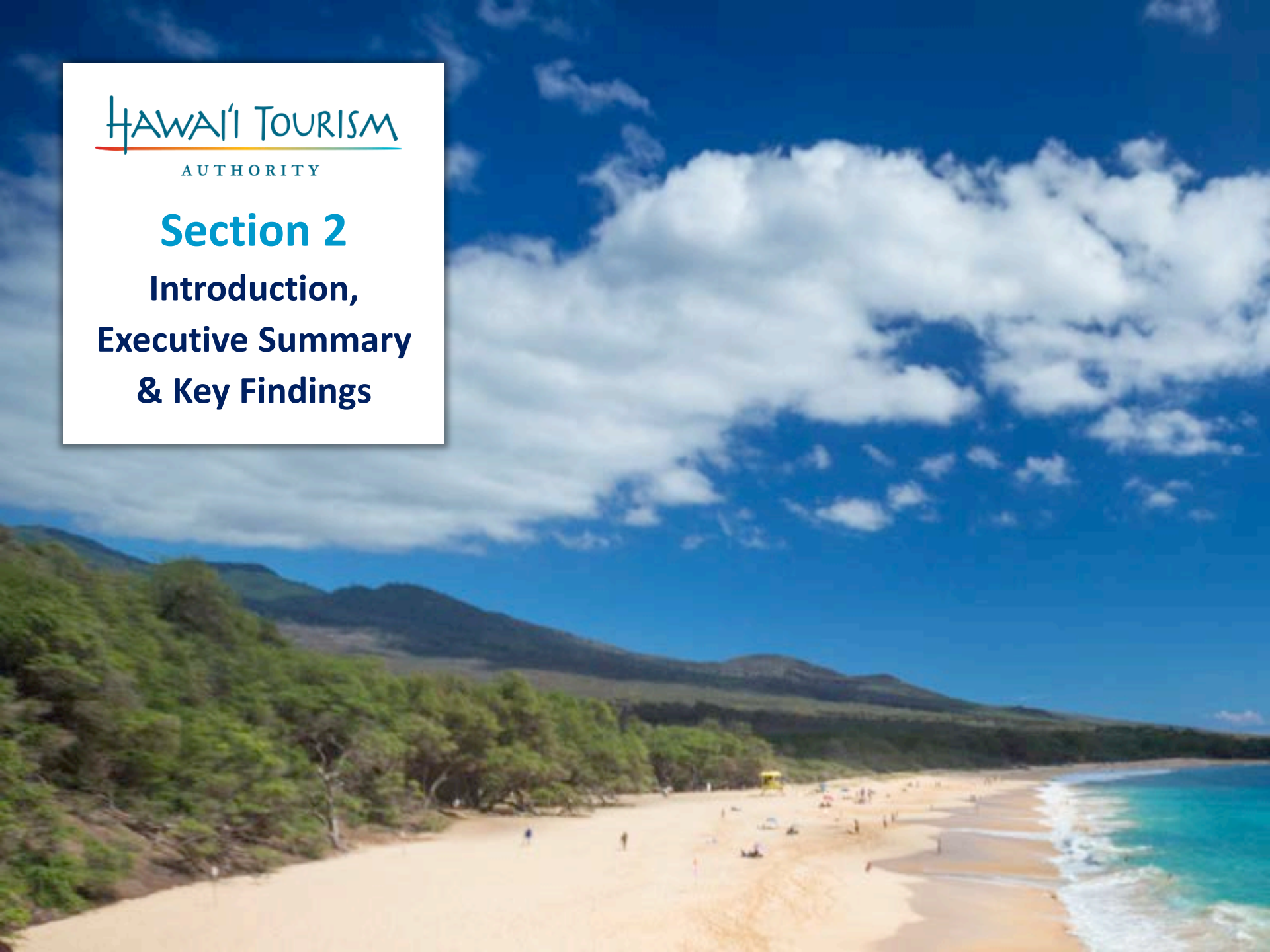
Avg. 3.2 Trips

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Section 2

Introduction,
Executive Summary
& Key Findings





About the LGBT Community in Taiwan

- LGBT rights in Taiwan is regarded one of the most progressive in Asia. Taiwan has become increasingly tolerant in LGBT issues in the past few years.
- Same-sex sexual activities have never been a crime in Taiwan.
- Discrimination based on sexual orientation has been banned statewide in education since 2003 and employment since 2007.
- Registration of same-sex partnerships has been implemented in 11 cities and counties that account for 80% of the country's population. However, legal protections to the couple is still limited under the registration since over 400 rights like property rights, social welfare, and government health benefits are granted exclusively to marriage.
- As of Wednesday, May 24th, 2017, Taiwan's Constitutional Court ruled that the Civil Code's definition of marriage as being only between a man and a woman is unconstitutional. The ruling paves the way for Taiwan to legalize same-sex marriage, which is the first in Asia.
- Reputation of being LGBT-friendly has helped the business sector, especially the tourism industry. Taiwan has become one of the most popular LGBT destinations in Asia.
- Taiwan Pride attracted over 80,000 attendees in 2016, making it the largest Pride Event in Asia.



Executive Summary & Key Findings

Taiwan LGBT Travelers Demographic Highlights

More gay and bisexual men than lesbian and bisexual women were reached through the general LGBT media channels used to recruit for this project. In addition, many lesbian and bisexual women recruited for the project did not meet the pre-set criteria for entering the survey, which resulted in 83% gay and bisexual men and 15% lesbian and bisexual women completing the survey. 83% of LGBT Taiwanese responding to the survey were younger than 40. Over 90% of the respondents were from the six most populated cities in Taiwan. The respondents also tended to be highly educated and employed by others or self-employed.

Destination Selection and Vacation Motivation

Taiwanese LGBT respondents reported taking vacations because of a variety of reasons. The most popular reasons were rest & relaxations (74%), experience other cultures (67%), and explore and discover new things (59%). And the following attributes, attractions and activities had the biggest influence in selecting vacation destinations: safety & security (72%), a sense of relaxation (71%), a good value for money (53%), interesting food and cuisine (75%), historical sites and unique landmarks (56%), arts/cultural activities (53%) and shopping (52%). LGBT reasons were not as important to travel motivations or destination selections for Taiwanese LGBT respondents. No LGBT options scored over 35%. In vacation motivation, 27% of respondents selected “to experience the local LGBT scene while on vacation.” LGBT-friendly received 32% in destination attributes. LGBT events and LGBT neighborhood received 35% and 25% respectively in destination attractions/activities.



Executive Summary & Key Findings

Vacation History in the Past 3 Years

On average, the Taiwanese LGBT respondents took 3 vacations outside Taiwan in the past 3 years that is at least one vacation per year. Japan (71%) is the most popular destination among both Taiwanese LGBT men and women, which is similar to statistics for the general population. Thailand (39%) ranked second and is favored by gay and bisexual men. Continental USA (11%) is the most popular long distance destination, closely followed by Australia (10%). Bali Island and various European destinations generally garner 6%-7% visitation rates. Only 3% of the gay and bisexual men respondents visited Hawai'i in the past 3 years, although Hawai'i is relatively competitive among Pacific Island destinations.

Future Destination Planning

Future travel results are more about perceptions and desirability than a good predictor of actual travel. Japan and Thailand scored high in destination planning in the next 2 years. Australia is the most popular long distance destination with a 19% rating. Continental USA and UK both have 17% willingness rating, followed by other Western Europe destinations. Taiwanese LGBT respondents do not show strong interest in visiting island destinations in the next two years. No island destinations scored over 8%. Bali, Maldives and Guam are all more favorable than Hawai'i by Taiwanese LGBT respondents. These island destinations do have advantages over Hawai'i in proximity to Taiwan and overall cost.



Executive Summary & Key Findings

LGBT-friendly Rating

Hawai'i's LGBT-friendly rating was 12% which was higher than Las Vegas (11%) and close to Madrid, Spain (15%) and London, UK (15%). Bangkok, Thailand (78%) was rated the most LGBT-friendly destination, probably due to its long-term LGBT-friendly reputation. Although Japan is considered by many to be a more conservative Asian society with regards to LGBT issues, Tokyo (42%) ranked the second in LGBT-friendliness by Taiwanese LGBT respondents.

Last Vacation Outside Taiwan

85% of Taiwanese LGBT respondents visited Asian destinations during their last vacation. The most popular destinations were Japan (41%) and Thailand (14%), followed by South Korea (7%), China (6%) and Hong Kong (5%). Similar to the Continental USA (3%), Australia was the most popular long distance destination with a 4% visitation rate. 8% of the respondents visited Europe but no individual European country received 3% or more. On average, Taiwanese LGBT respondents had 2.5 people in their party and spent 5.2 nights during their last vacation outside Taiwan. 22% of respondents paid for prepaid inclusive packages that mostly include airfare (95%) and accommodations (95%). The average total spending (including any prepaid packages) per person during their last vacation was NT\$41,549 (US\$1,380).



Executive Summary & Key Findings

Hawai'i Visitation

8% of respondents have visited Hawai'i in their lifetime, the base number was low (n=36) so it only provided some directional results. Most of the Hawai'i visitors (92%) have visited the destination only once or twice and only 28% visited Hawai'i in the past 3 years. The average number of nights they spent in Hawai'i is 5.1.

What's Holding Back Taiwanese LGBT Respondents from Visiting Hawai'i?

The most common reasons for Taiwanese LGBT respondents for not visiting Hawai'i were because of "financial reasons/travel costs" (42%), "not enough time to travel" (36%), and "not familiar with what there is to see and do in Hawai'i" (35%). 72% of all respondents selected at least one of these reasons. Although higher income (annual HHI NT\$600,000+) Taiwanese LGBT people responded to the survey, 2 out of 5 of them still considered cost as a concern for visiting Hawai'i. The direct flight from Taipei to Honolulu takes about 9 and a half hours, which is considered a long flight not suitable for short trips. In comparison, it takes less than 4 hours to fly to Tokyo or Bangkok from Taipei. However, there's potential in future Taiwanese LGBT people traveling to Hawai'i, since over one third of them are not familiar yet with the possible activities and excursions on the islands.



Executive Summary & Key Findings

Taiwanese LGBT Respondents' Perceptions about Hawai'i

A large number of respondents have the perception that “Hawai'i offers great beaches” (82%), “Hawai'i provides a sense of relaxation, a place to unwind, and get re-energized” (59%) and “Hawai'i is romantic” (55%). However, in comparison to general destination features that respondents cared about, Hawai'i did not score very well. 72% of respondents rated “safety and security” an important destination attribute but only 26% respondents agreed “Hawai'i is a safe and secure place”; 75% of respondents are looking for “interesting food and cuisine” but only 21% thought Hawai'i has “interesting food and cuisine; and 56% of respondents would love to see “historic sites and unique landmarks” but only 18% thought they could find that in Hawai'i. Hawai'i provides a wide range of attractions and activities; therefore, it's important to market the right experience to potential visitors. 17% agreed that “Hawai'i is a great LGBT vacation destination.” When we asked why they decided not to visit Hawai'i in the past 3 years, only 1% indicated “Hawai'i is not an LGBT friendly destination” and 4% suggested that there were “not enough LGBT-dedicated activities”.



Outreach Recommendation

LGBT-specific websites: 68% of Taiwanese LGBT respondents view LGBT-specific websites, either news or entertainment, on a weekly basis.

Same-sex mobile apps: 71% of gay and bisexual men use same-sex dating mobile apps on a weekly basis.

Travel inspiration and booking: Top sources where Taiwanese LGBT respondents got their destination information were from friends or relatives (55%), online booking sites (48%), travel agent (46%), airline website/app (46%), and travel guide books (45%).

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Section 3

Competing Destinations






LGBT Visitation by Demographic: Japan and Thailand were the most popular destinations among the LGBT participants in Taiwan because of proximity, culture and price factors. Continental USA destinations were leaders in long distance destinations, followed by Australian and European destinations. For island destinations, Bali Island was leading with a 6%-7% visitation rate from both men and women. Only 3% of gay and bisexual men reported having visited Hawai'i in the past three years.



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


	Gay & Bi Men	Lesbian & Bi Women
Japan	71%	72%
Thailand	42%	25%
Australia	11%	9%
West Coast USA (e.g. California)	8%	4%
Bali Island, Indonesia	7%	6%
East Coast USA (e.g. New York or Florida)	7%	7%
France	7%	0%
Germany	7%	4%
UK	6%	6%
Italy	6%	4%
Spain	4%	3%
Dubai	4%	1%
Turkey	3%	0%
 Hawai'i, USA	3%	0%
Guam	2%	0%
Maldives	1%	0%
Other	53%	59%



Future LGBT Visitation by Demographic: Respondents showed a willingness to visit Japan and Thailand in the next two years. However, a higher number of respondents showed interest in visiting Australian and European destinations than individual Continental USA destinations. Hawai'i scored low in island destination visitation planning.



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

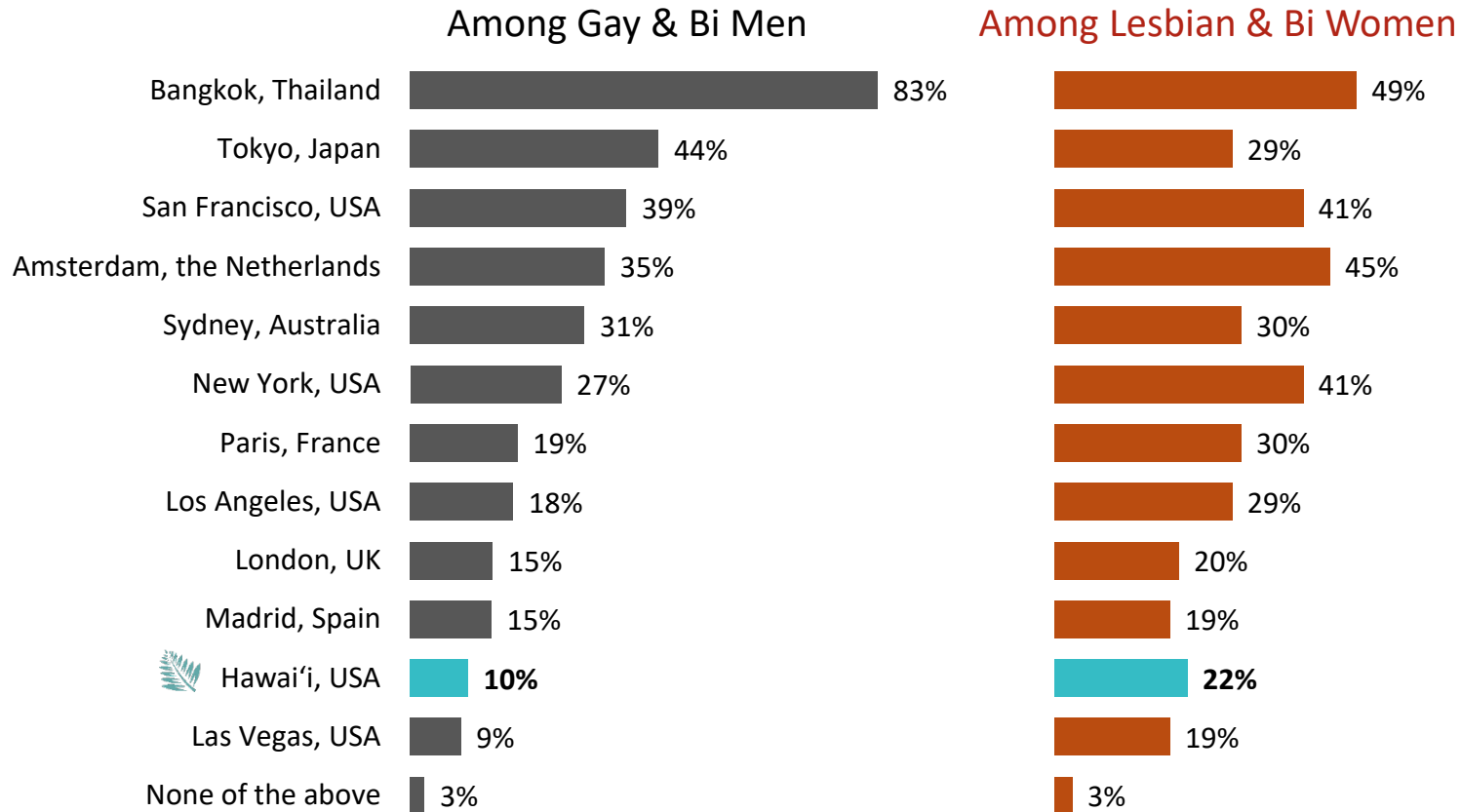
	Gay & Bi Men	Lesbian & Bi Women
Japan	68%	62%
Thailand	45%	26%
Australia	19%	22%
UK	17%	14%
France	13%	13%
Germany	12%	16%
West Coast USA (e.g. California)	11%	12%
Spain	11%	6%
Italy	11%	13%
East Coast USA (e.g. New York or Florida)	11%	9%
Bali Island, Indonesia	9%	6%
Maldives	8%	6%
Guam	6%	12%
 Hawai'i, USA	6%	7%
Turkey	5%	4%
Dubai	4%	3%
None of the above	5%	14%



LGBT-Friendly Rating: Hawai'i LGBT-friendly ratings by respondents were low. Only 10% of men and 22% of women considered the destination LGBT-friendly. Their LGBT-friendly rating may indicate that additional education is needed about Hawai'i to Taiwanese LGBT travelers.



**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.**



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Section 4

LGBT Travel Motivations



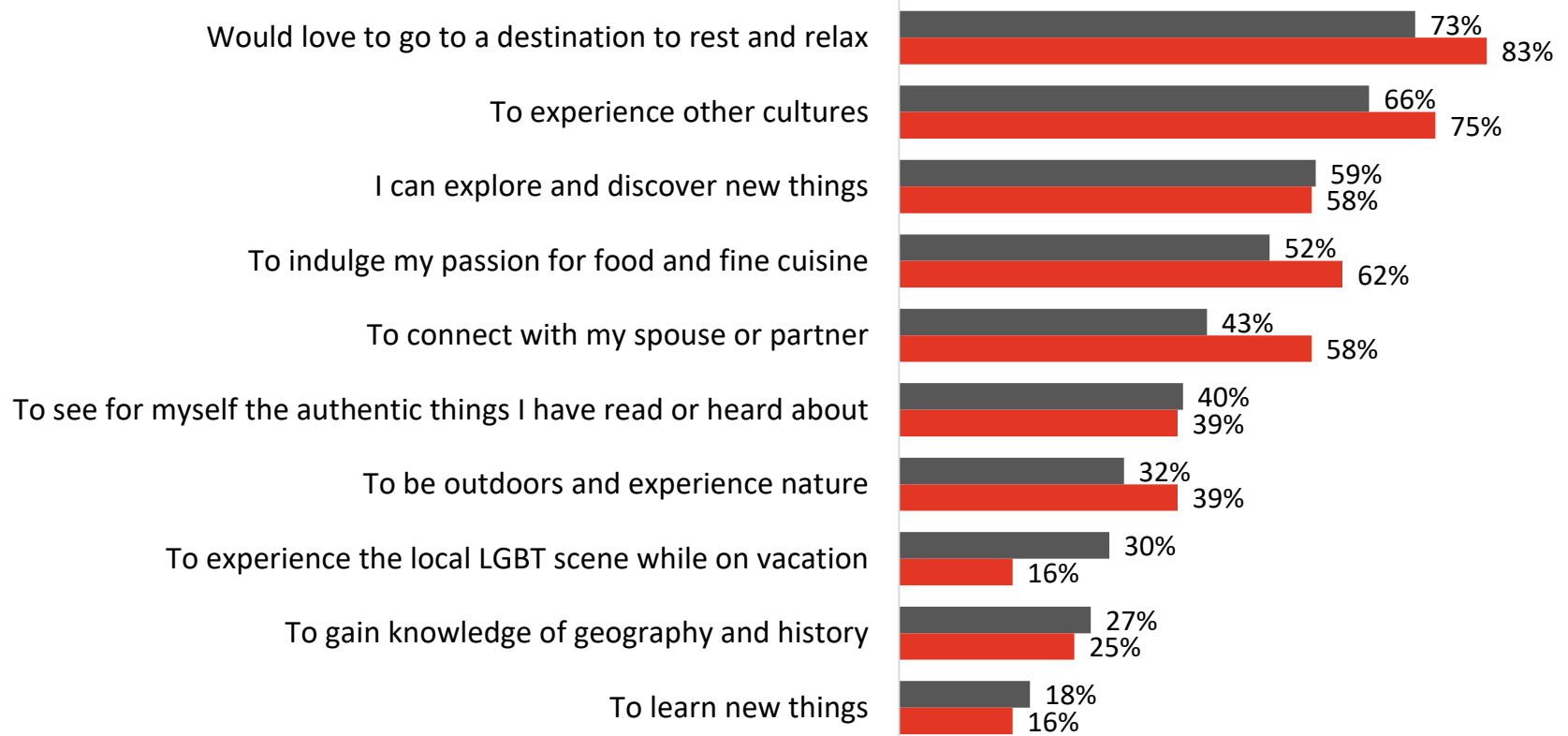


Vacation Motivation: The most important motivations for Taiwanese LGBT respondents to take vacations were “rest and relaxation,” “experience other cultures,” and “explore & discover new things.” “To connect with spouse or partner” was a more important motivator for women (58% vs. 43%); while “local LGBT scene” was relatively more important for gay and bi men (30% vs. 16%).



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

- Gay & Bi Men
- Lesbian & Bi Women





International Destination Attributes: “Safety and security,” “a sense of relaxation” and “good value for money” were the most important attributes for the respondents when selecting a vacation destination outside Taiwan. “LGBT-friendliness” was of lower importance, especially for lesbian and bi women.



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

Top Attributes	Gay & Bi Men	Lesbian & Bi Women
It is a safe and secure place	71%	77%
It provides a sense of relaxation, a place to unwind, and get re-energized	70%	72%
It’s a good value for the money	53%	51%
The local people are friendly	42%	35%
There are many historic and cultural things to do and see	40%	42%
It has a variety of unique experiences and activities	37%	52%
The environment is clean	35%	36%
It is LGBT-friendly	35%	17%
It has unique scenery unlike anywhere else	33%	41%
It offers quality culinary and dining experiences	26%	36%
Other	1%	0%



International Destination Attractions and Activities: “Interesting food/cuisine” was highly ranked by Taiwanese LGBT respondents in relation to attractions and activities.” Historical sites and unique landmarks” and “arts/culture activities” were also among the top interests for both men and women. “Shopping” is considered a very important activity for gay and bi men, while more lesbian and bi women were more interested in natural sightseeing.



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

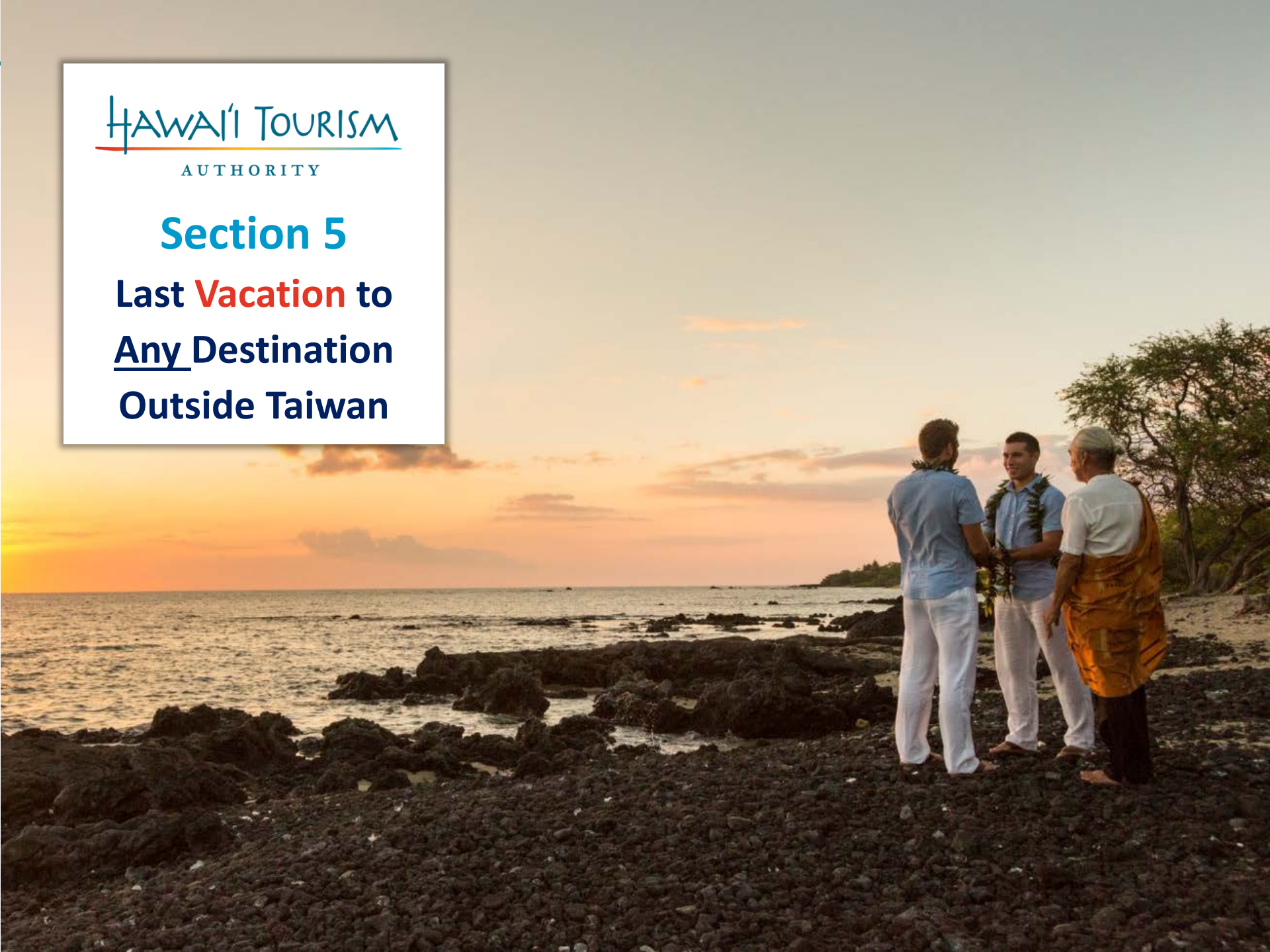
	Gay & Bi Men	Lesbian & Bi Women
Interesting food/cuisine	72%	88%
Shopping	55%	36%
Historical sites and unique landmarks	54%	67%
Arts/culture activities (museums, art galleries, festivals, etc.)	52%	57%
National parks and other natural sightseeing	45%	58%
Beaches	43%	25%
Vibrant nightlife	40%	16%
LGBT events like Pride or Film Festivals	38%	23%
Local-made unique products to buy	38%	30%
Water sport activities (snorkeling, swimming, surfing, etc.)	28%	20%
LGBT neighborhood	27%	16%
Outdoor activities (hiking, biking, golfing, etc.)	15%	16%

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Section 5

Last **Vacation** to
Any Destination
Outside Taiwan





Vacation Destinations Outside Taiwan: During their last vacation outside Taiwan, 85% of the respondents visited destinations in Asia. Top Asian destinations by country are Japan and Thailand, which corresponds with the respondents' travel history in the past 3 years, followed by South Korea, China and Hong Kong. 8% of the respondents visited destinations in Europe, 4% visited Australia and 3% visited destinations in the USA including Hawai'i.

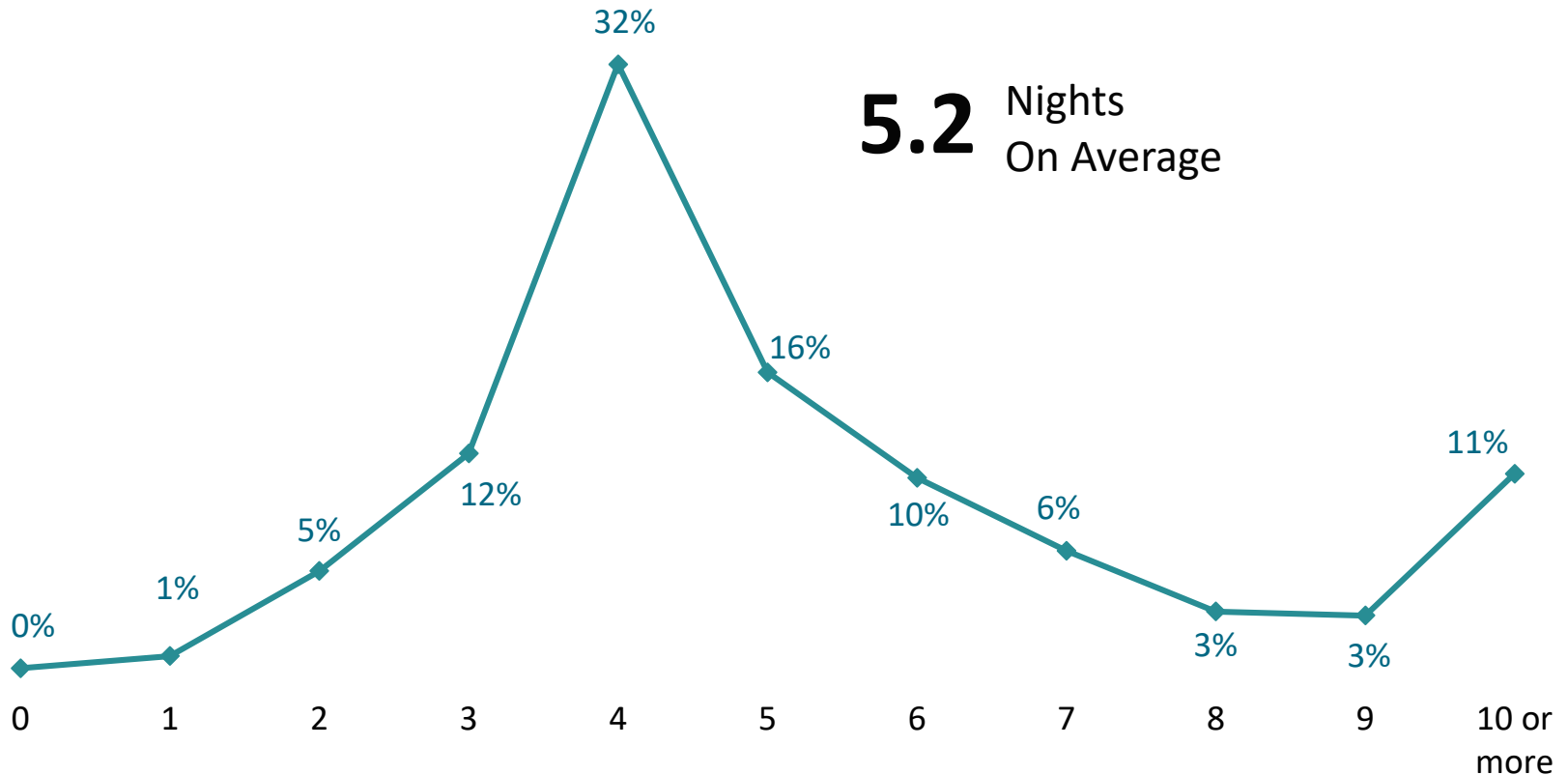
Any destination in Japan	41%
Any destination in Thailand	14%
Any destination in South Korea	7%
Any destination in China	6%
Hong Kong	5%
Any destination in Australia	4%
Any destination in USA	3%
Any destination in Europe	8%
Other Asian destinations	10%



Vacation History Outside Taiwan: Respondents spent an average of 5 nights during their last vacation outside Taiwan. 64% spent between 4 to 7 nights while 11% spent 10 or more nights for the trip.



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





Prepaid Package for Last Vacation Outside Taiwan: 22% of the respondents said their trip was part of a pre-paid, inclusive tour package. Airfare and accommodations were included (95%) in almost all the prepaid packages.

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

Tour packages are formulated for tourists who want to travel independently. Components of the packages usually include airfare, accommodations, attraction admission fees, etc.

22%

Yes



74%

No

4% Not Sure

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



Airfare



Accommodations



Attractions/Event/
Entertainment



Meals



Guided tours



Rental car



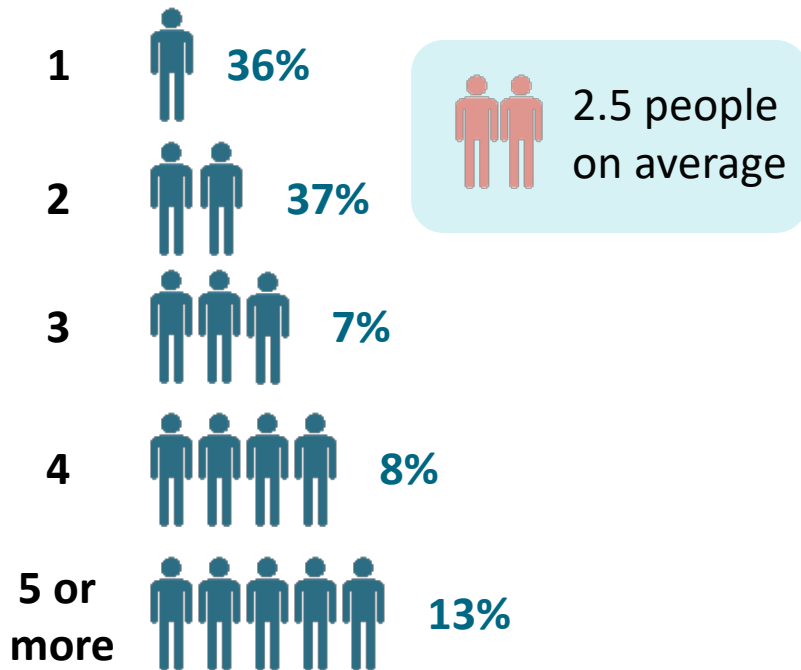
Other





Number of People and Average Spending for Last Vacation Outside Taiwan: 73% of the respondents traveled in a party of no more than 2 people during their last vacation outside Taiwan. On average, 2 or 3 people were on that trip. The total average spending, including any prepaid packages, per person was NT\$41,549 (approx. US\$1,380).

of People on Trip



Total Average Spending (Per Person)

NT\$41,549

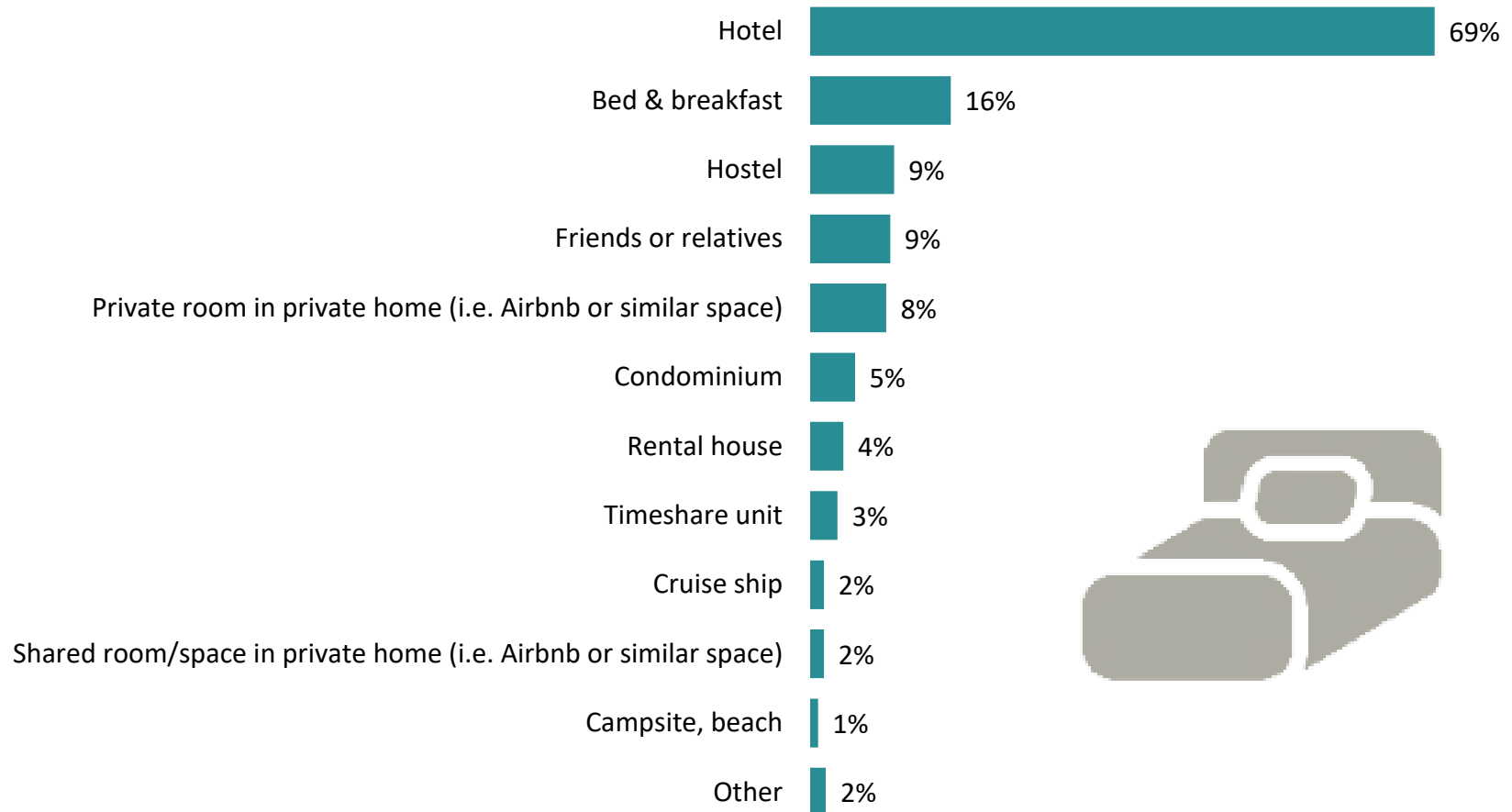




Accommodation for Last Vacation Outside Taiwan: Most Taiwanese LGBT respondents preferred traditional hotel accommodations.



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



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Section 6
LGBT Hawai'i
Travel





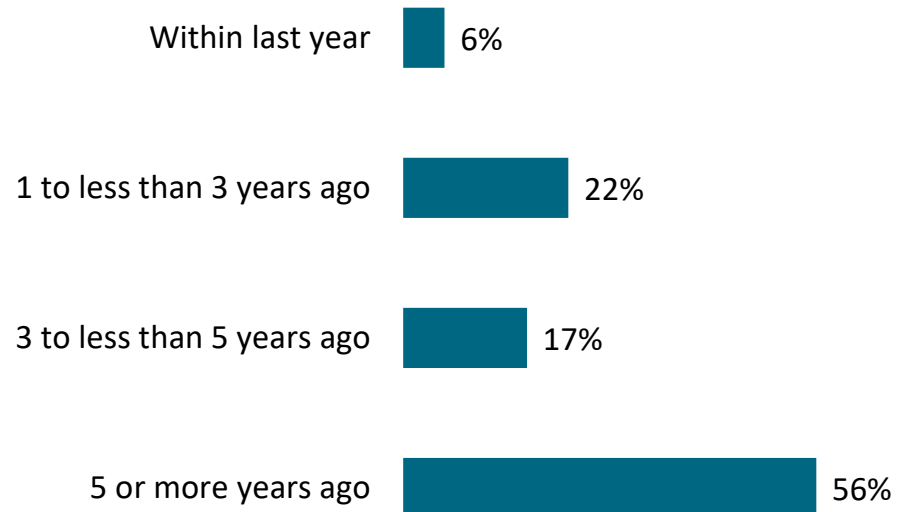
Hawai'i Visitation: 8% (36) of the Taiwanese LGBT participants surveyed have visited Hawai'i during their lifetime but only 28% (10) of the respondents said they have visited Hawai'i in the past 3 years.

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

8% Have visited Hawai'i as an adult

	Counts
1-2	33
3-5	2
6 or more	1

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

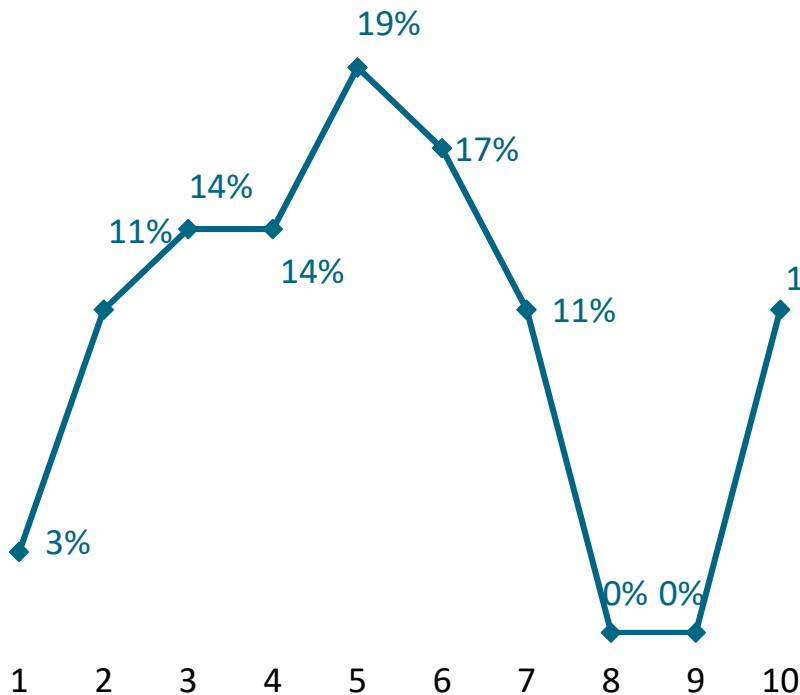




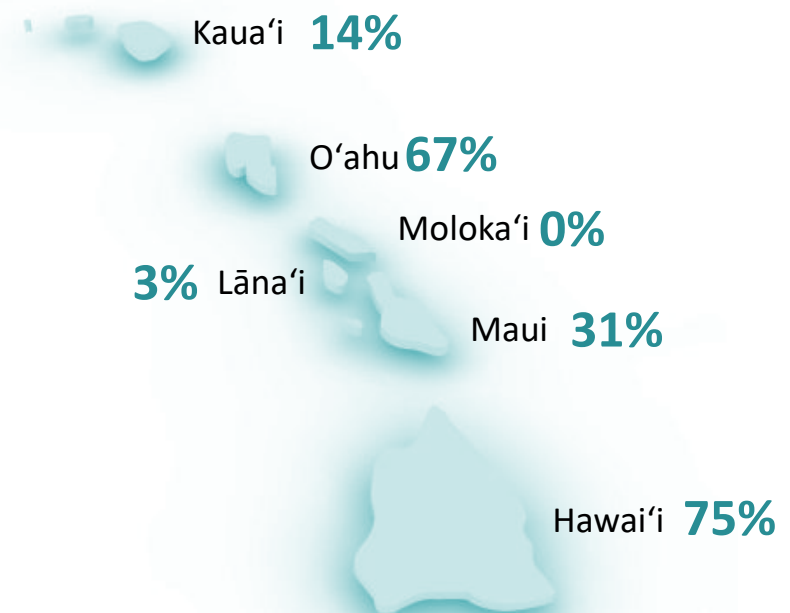
Hawai'i Visitation: The average number of nights for the respondents' last visit is 5 and the most popular islands are Hawai'i Island and Oahu Island. However, because of the low base number (n=36), the results are only directional.

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

Average Number: 5.1 nights



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

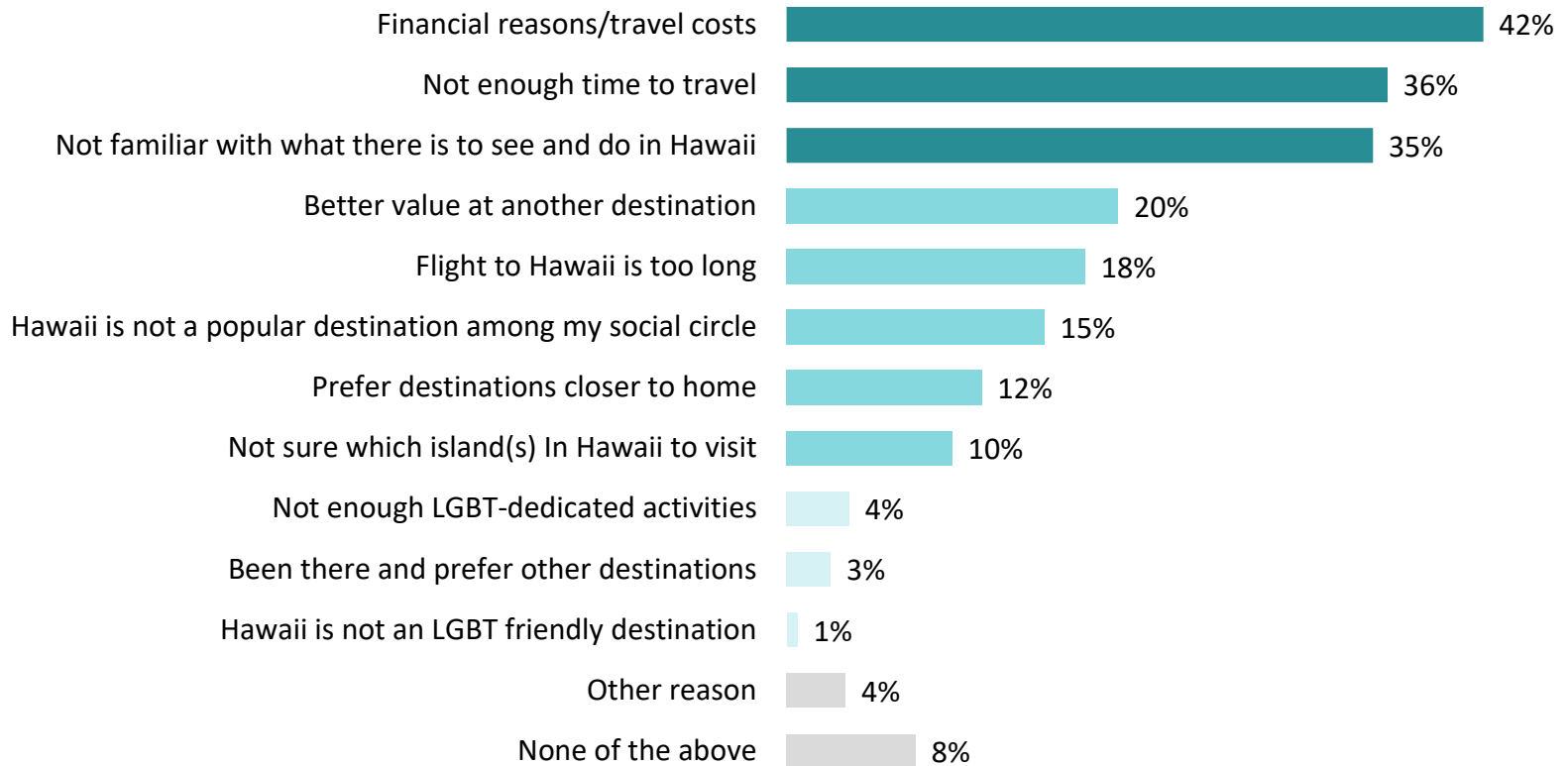




Reasons for not visiting Hawai'i in the past 3 years: Among the respondents who haven't visited Hawai'i in the past 3 years: cost, time and unfamiliarity were the most common reasons cited. Although most respondents did not rate Hawai'i as an "LGBT-friendly destination," they definitely do not consider Hawai'i an "LGBT-unfriendly destination." Only 4% of those who haven't visit Hawai'i recently indicated LGBT-related reasons.



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

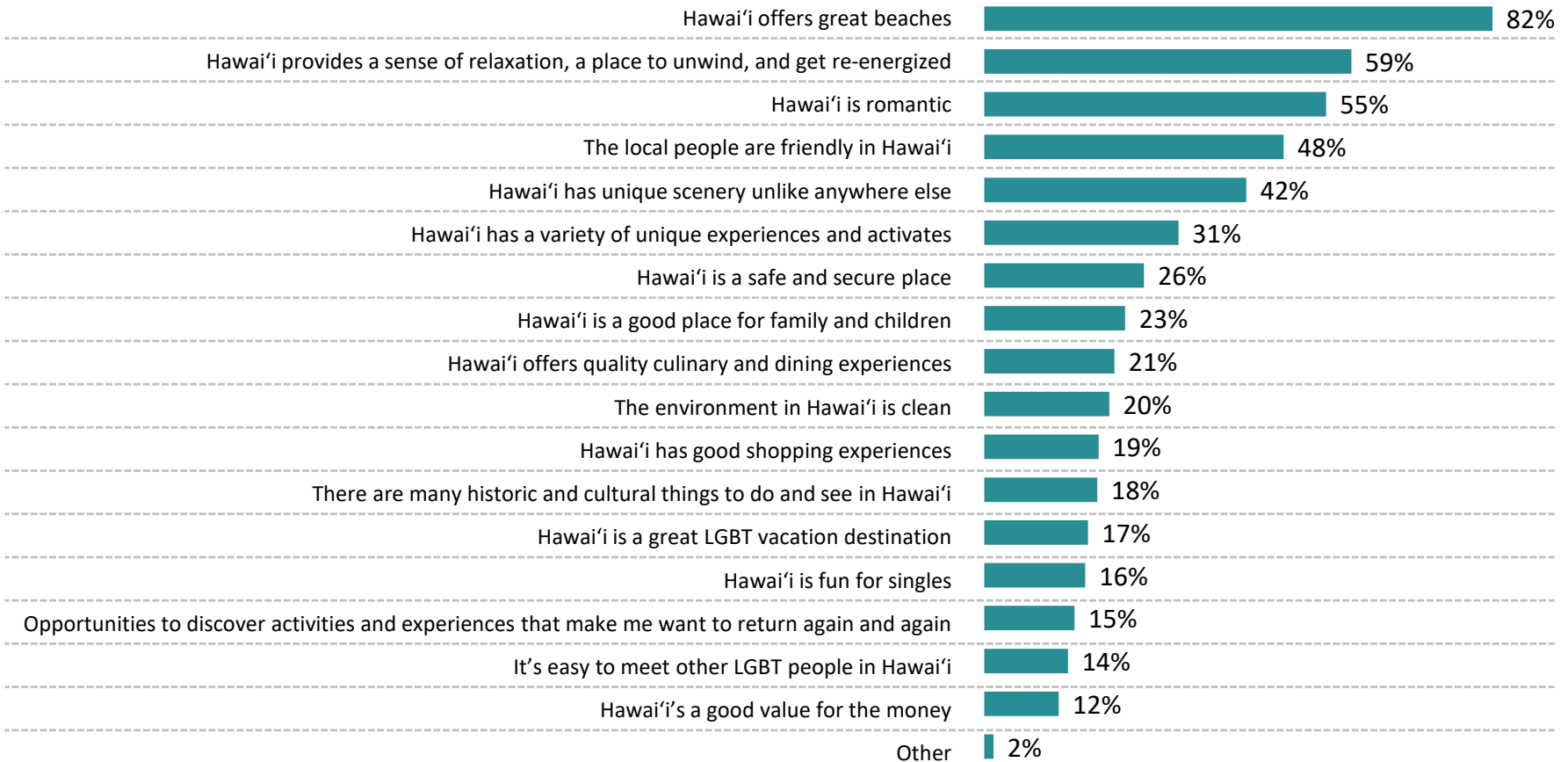




Hawai'i Attributes: Although 82% of the respondents agreed that Hawai'i offers great beaches, only 41% of them selected beaches as an important attraction/activity for destinations. Important destination features for respondents were safety, food, culture/arts, history, shopping and good value for money; however, these scored low for Hawai'i. Therefore, it's important to highlight these other features in future outreach campaigns.



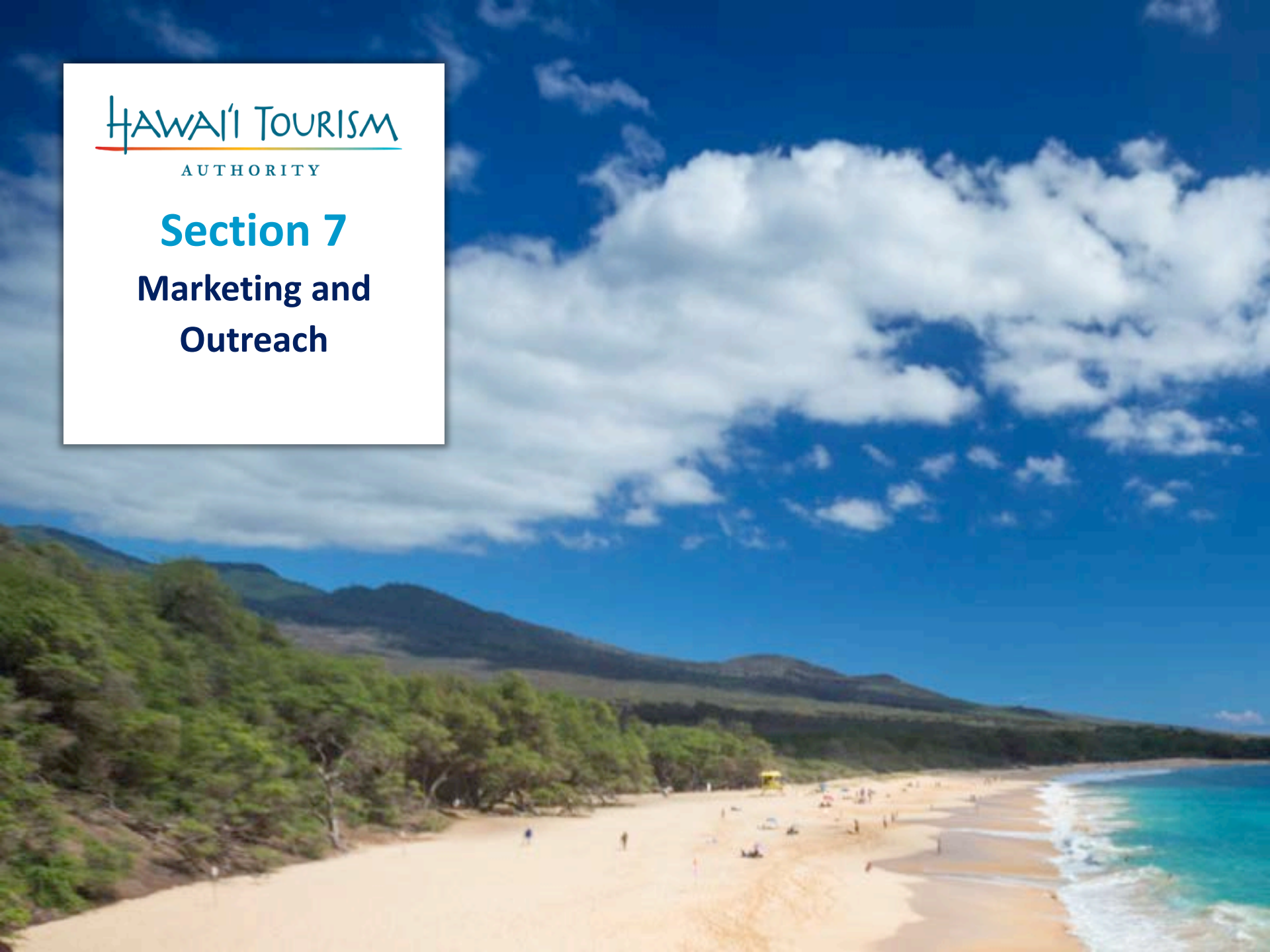
Below are some attitudes in regards to traveling to Hawai'i. Regardless of whether you have visited Hawai'i, do you personally agree with these statements? I agree that.....





Section 7

Marketing and Outreach





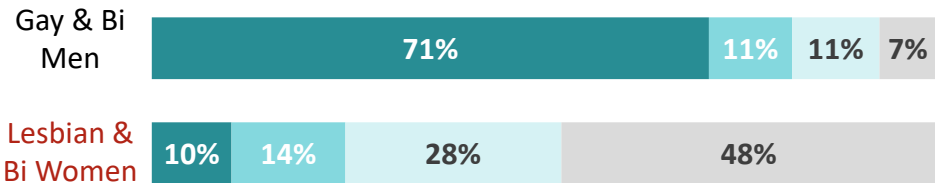
Media Planning Chart



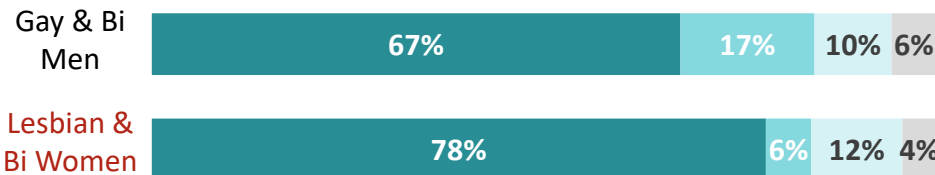
How often do you.....

■ Weekly ■ Monthly ■ A few times a year ■ Never

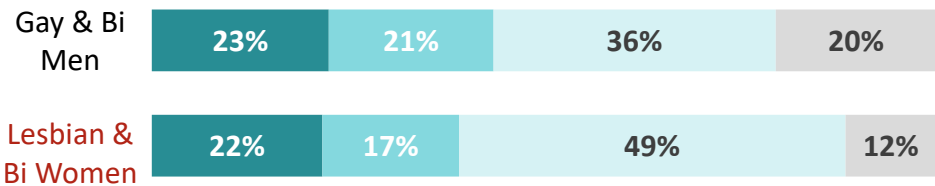
Use same-sex dating mobile apps



View LGBT-specific websites, either news or entertainment



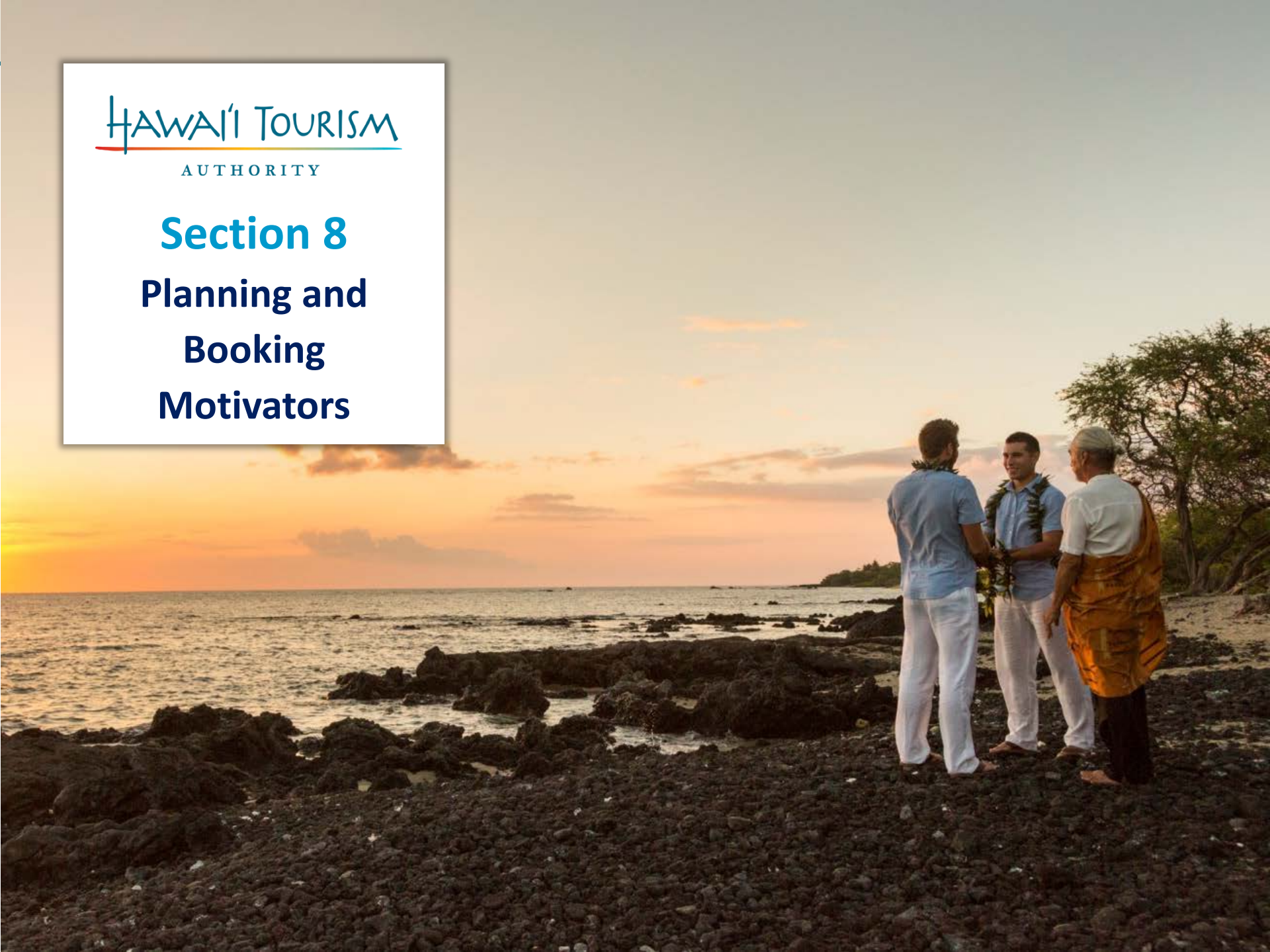
Read LGBT-specific print publications such as LGBT magazines or newspapers



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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)

	Gay & Bi Men	Lesbian & Bi Women
Recommendations from friends or relatives	53%	68%
Online booking sites (e.g. ezTravel, Lion Travel)/mobile app	48%	48%
Travel agent	46%	48%
Airline website/mobile app	46%	45%
Travel guide books	45%	45%
Social media (e.g., Facebook, Instagram, Pinterest)	41%	39%
Hotel website/mobile app	40%	38%
Mainstream travel websites or blogs	30%	46%
Destination website	25%	39%
Travel apps	24%	23%
Adventure/outdoor/travel magazines	19%	22%
LGBT websites or blogs	17%	7%
Travel Trade Shows (e.g. TTE, ITF)	16%	17%
Television/Radio	8%	4%
LGBT magazines	6%	1%
None of the above	2%	1%



Mahalo...

For more information:

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