

HAWAII TOURISM

AUTHORITY

Reaching the LGBT Traveler Canada Report

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

October 2016



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

Canada Report Executive Summary & Key Findings





Executive Summary & Key Findings • USA Report



USA and Canada Results Are Similar

While this report looks at the Canadian results, perhaps the most important finding is how similar the overall results are between the USA and Canadian LGBT community reports. LGBT participants from the two countries look for the same attributes in a vacation. For example, the primary Canadian LGBT motivations to take any vacation are to explore and to do new things, experience other cultures, and rest and relaxation; the top three travel interests were cuisine, history and culture. These indicators were the same for USA travelers, with similar percentages.

Based on the USA and Canadian research reports, a North American campaign including both countries is appropriate. CMI recommends reading the USA report to more fully understand the overall North American LGBT community's travel preferences. With a much larger number of research participants in the USA report, there are far more nuanced findings that should also apply to Canadian LGBT travelers as well.

While this report will point out some important differences between the USA and Canadian traveler, the overall finding is that the two groups are more similar than different. Much of the difference is probably explained by Canadians having more international travel experience.



Canadians Are Less Enthusiastic About Hawai'i than USA Residents

In analyzing perceptions of Hawai'i, LGBT Canadians are somewhat less positive about Hawai'i than LGBTs living in the United States. Their overall perceptions were similar in that LGBT Canadians are most likely to indicate that Hawai'i has unique scenery, and Hawai'i is a place to relax and energize. However, of the 16 Hawai'i perception options, Canadians were consistently less positive across all responses; typically 5% to 15% less positive. For example only 51% of Canadians strongly agreed that Hawai'i has unique scenery unlike anywhere else, compared to 61% for USA residents. Another example, 33% of Canadians said Hawai'i has a variety of unique experiences and activities compared to 47% in the United States. This difference is most likely due to Canadians' more extensive international travel experience.



Executive Summary & Key Findings • USA Report



Value in Hawai'i

For LGBT Canadians, their more negative perceptions of value may be a of concern. Among research participants, 42% indicated that they receive better value in other destinations, and only 18% agreed that Hawai'i is good value for the money.



Canadian LGBT Travel to Hawai'i

While the research indicates some negative Hawai'i perception and value concerns, Canadian LGBT travel to Hawai'i is actually quite good; 6% of the participants reported having visited Hawai'i in the past year, and 27% in the past five years. These are similar percentages to USA LGBT travelers. Canadian visitation was stronger for those living in the Western Provinces and older LGBTs. However, different than the USA, visitation rates were much higher for Canadian gay men, compared to lesbians. While LGBT lesbian and bisexual women underperform in actual visitation, lesbian rates are similar to gay men for future interest in Hawai'i visitation.



Warm Weather Competition for Future Travel

Canadians have different warm weather travel patterns than LGBTs living in the United States, and LGBT Canadians are avid international travelers. Visitation in the past three years included Western Europe (38%), Mexico (36%), Caribbean (30%), Cuba (11%), and Florida (25%). The international competition for future Canadian LGBT warm weather travel is strong and growing. The positive news is that in the next two years, 22% of the LGBT Canadian participants expressed an interest in visiting Hawai'i (vs. the USA resident figure at 27%). Hawai'i has very positive comparative rates for future travel interest vs. recent travel. In addition, the research points to some reduction of interest to Mexico, Las Vegas, Caribbean and Florida. This may indicate some saturation with LGBT travel to these other destinations that does not exist for Hawai'i.



Executive Summary & Key Findings • USA Report



LGBT-friendly Ratings

Hawai'i's LGBT-friendly rating among Canadian participants is not great. Only half rated the destination positively (compared to 75% of USA residents). Destinations like Puerto Vallarta and Las Vegas scored higher than Hawai'i. The rating was especially weak among women. This lukewarm LGBT-friendly rating most likely indicates that additional education is needed about LGBT Hawai'i to Canadian travelers.



Island Preferences

The report points to a stronger Canadian preference to visit Maui. Of those who visited the state in the past five years, on their last visit, 57% visited Maui, compared to 44% Oahu and 31% the Big Island.



Outreaching to LGBT Canadians

Marketing and outreach to the Canadian LGBT community can be more complex than in the United States. Most LGBT media are USA-based and there are comparatively fewer Canadian-based options. However, the research points to Canadians viewing USA-based media options only slightly less than USA viewers. DailyXtra, the one truly Canadian LGBT media on the research list, did have good viewership among Canadian gay men and recent Hawai'i visitors. In an average week, about 15% of Canadian participants look at LGBT-specific print publications and 43% look at an LGBT-specific websites. These percentages are slightly lower than USA viewership rates. Canadian LGBT social media is strong and largely matches the USA engagement rates.

HAWAII TOURISM

AUTHORITY

Section 2

Research Methodology





Methodology and Understanding the Report

In August 2016, Community Marketing & Insights (CMI) fielded an online survey for the Hawai'i Tourism Authority to gauge tourism trends and motivations of the LGBT community. A subset of active members of CMI's proprietary LGBT research Canadian panel were invited by email to complete the 12-minute online survey. An incentive of a chance to win one of twenty \$50 cash prizes was provided to encourage participation in the study. The study was conducted in English, which may have reduce participation from Quebec.

This report covers Canada residents only. LGBTs living in the United States and other countries are reported in separate documents. Participants were recruited from the Community Marketing & Insights LGBT research panel with the following qualifications:

- Identifies as a member of the LGBT community
- Age 25 or over
- Household income over \$80,000 Canadian with some accommodation for those earning \$60,000 to \$79,999 if they are single, retired or have a recent travel history to Hawai'i
- Taken at least one leisure trip of 500 or more miles 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. The income specification tends to create a group that trends older, wealthier and coupled. Also, because of demographic trends within the LGBT community, African American, Latino and female participants were somewhat underrepresented.

CMI tested the final survey participant demographics against the demographics of the participants of CMI's full research panel with a household income over \$75,000. The two groups matched, and CMI feels that the final USA sample is reflective of the LGBT community over age 25 who have higher household incomes, and who travel. These are the best visitor prospects for Hawai'i.

The survey has a margin of error of ±5.12% at a 95% level of confidence.

The Canadian all LGBT results were weighted with a gay/bisexual men : lesbian/bisexual women ratio of 59% : 41% in order to provide better comparisons to the USA report with those ratios.

ABOUT THE CMI LGBT RESEARCH PANEL

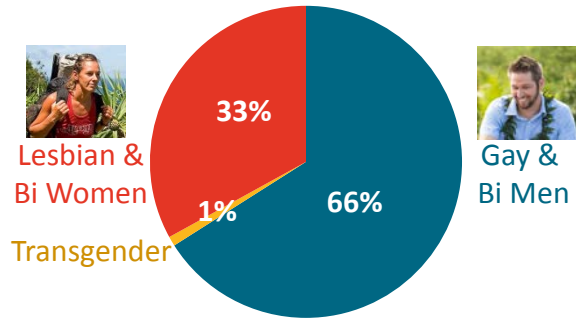
- › CMI has built a proprietary research panel of 70,000+ LGBT consumers through partnerships with more than 300 LGBT publications, blogs, websites, social media, apps, events and organizations over a 24-year period.
- › Importantly, the panel reflects the readership/membership of a broad range of LGBT-focused 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.



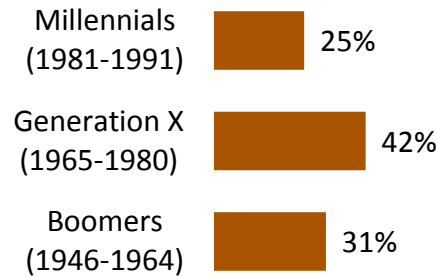
Canada LGBT Research Respondent Profile (N=366)

The research methodology strived to identify LGBT travelers age 25 or over, with a reasonable potential of visiting Hawai'i. By nature of the destination, that means higher income members of the LGBT community. With 90% of the LGBT research participants having a household income over \$80,000 Canadian and 64% over \$100,000, the research participant group trends older and more likely to be coupled. The completed survey group trended somewhat more male than anticipated. For this reason this report weighted the all LGBT Canadian results by gender (see methodology).

Identity



Generation



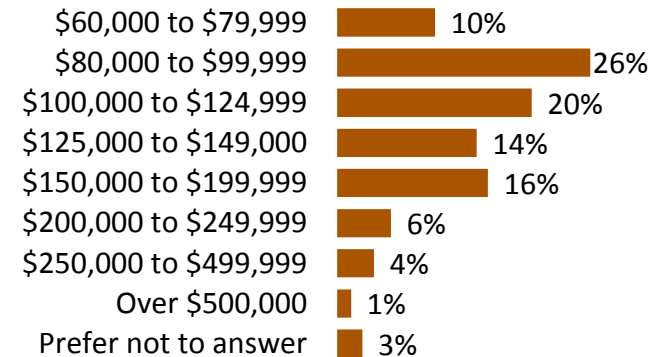
Ethnicity

White / Caucasian/European	85%
Hispanic / Latino	3%
Asian	5%
African American/Black	2%
Mixed Race	4%
Other	2%

Relationship

	Gay & Bi Men	Lesbian & Bi Women
Married	27%	46%
Single	28%	7%
Living with partner / No legal status	19%	21%
Dating / Not living with partner	8%	9%
Civil union or domestic partner	12%	8%
Engaged to be married	1%	8%
Other	5%	1%

Income





LGBT Research Respondent Profile (N=366)

In addition, the research methodology eliminated any participant who did not travel to a destination over 500 miles away from home in the past three years. This is a low travel threshold and eliminated LGBT community members who just do not travel far from home. The income requirement produced a very educated participant group.

Top Provinces

Ontario	37%
Alberta	26%
British Columbia	21%
Quebec	7%
Manitoba	2%
Nova Scotia	2%
Saskatchewan	2%
New Brunswick	1%
Newfoundland and Labrador	0%
Prince Edward Island	0%
Yukon Territory	0%

Children



Gay & Bi Men

4% vs. 20%

Have children under 18 living at home



Lesbian & Bi Women



Gay & Bi Men

8% vs. 5%

Have grandchildren



Lesbian & Bi Women

Education

Post Graduate Degree	30%
College Graduate	39%
High School	31%

Employment

Employed, FT/PT	74%
Retired	10%
Self-Employed	12%
Other	4%



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 500 miles away for a leisure trip?

	Weighted Men & Women	Gay & Bi Men	Lesbian & Bi Women	Age 25-45	Age 46-69
1-2	20%	14%	29%	20%	20%
3-4	33%	30%	39%	39%	26%
5+	46%	56%	32%	41%	55%

HAWAII TOURISM

AUTHORITY

Section 3

Competing Destinations






LGBT Visitation by Demographic: Of the research participants, 18% reported having visited Hawai'i in the past three years (consistent with overall USA LGBT visitation rates). What is striking in the report is the very strong numbers for Canadian LGBT travel to Western Europe, Mexico and the Caribbean. The competition for the Canadian LGBT traveler is far more complex and competitive than for the USA LGBT traveler. In addition, Hawai'i's 3-year visitation is very concentrated among Western province gay men.



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


	Weighted Men & Women	Western Provinces	Eastern Provinces	Gay & Bisexual Men	Lesbian & Bisexual Women	Age 25-45	Age 45-69
Western Europe	38%	36%	41%	45%	26%	38%	36%
Mexico	36%	42%	32%	38%	33%	39%	33%
Las Vegas	31%	39%	25%	32%	30%	33%	29%
Caribbean	30%	24%	34%	26%	36%	26%	33%
Florida	25%	21%	31%	28%	21%	26%	26%
San Francisco	19%	25%	16%	23%	14%	19%	19%
 Hawai'i	18%	28%	10%	22%	11%	17%	20%
Los Angeles	16%	19%	15%	20%	10%	16%	17%
Cuba	11%	6%	15%	10%	13%	15%	7%
Arizona	11%	13%	9%	11%	11%	6%	15%
Australia	9%	14%	7%	13%	4%	9%	10%
San Diego	6%	11%	3%	8%	4%	7%	5%
Costa Rica	6%	6%	6%	6%	5%	6%	5%
None of the above	11%	10%	11%	10%	12%	9%	13%



Future LGBT Visitation by Demographic: In the next two years, 22% of the LGBT participants expressed interest in visiting Hawai'i. Caution should always be given to "future" travel questions, as they are often more about hopes and dreams, and discovering new destinations. That said, Hawai'i has +4% future interest, over actual travel from the previous chart. Mexico, Las Vegas, Caribbean and Florida had -3% to -5% future interest ratios. With the right offer, Hawai'i could see increased interest by Canadian LGBT travelers. There was also a strong Hawai'i interest among lesbians, especially compared to actual travel by lesbians.



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

	Weighted Men & Women	Western Provinces	Eastern Provinces	Gay & Bisexual Men	Lesbian & Bisexual Women	Age 25-45	Age 45-69
Western Europe	46%	49%	48%	57%	31%	46%	48%
Mexico	33%	38%	29%	32%	36%	34%	32%
Las Vegas	26%	33%	20%	27%	24%	30%	22%
Caribbean	26%	20%	29%	21%	31%	23%	27%
San Francisco	25%	32%	19%	27%	21%	27%	23%
 Hawai'i	22%	28%	15%	20%	25%	21%	22%
Florida	21%	14%	28%	23%	17%	23%	20%
Los Angeles	15%	16%	16%	19%	11%	17%	14%
Cuba	12%	9%	16%	16%	7%	15%	10%
Australia	12%	13%	11%	16%	6%	12%	12%
Costa Rica	8%	9%	6%	6%	10%	10%	6%
Arizona	8%	10%	5%	8%	7%	6%	9%
San Diego	7%	12%	4%	9%	5%	9%	6%
None of the above	9%	8%	10%	8%	11%	8%	11%



HAWAII TOURISM

AUTHORITY

Section 4
LGBT-Friendly
Rating



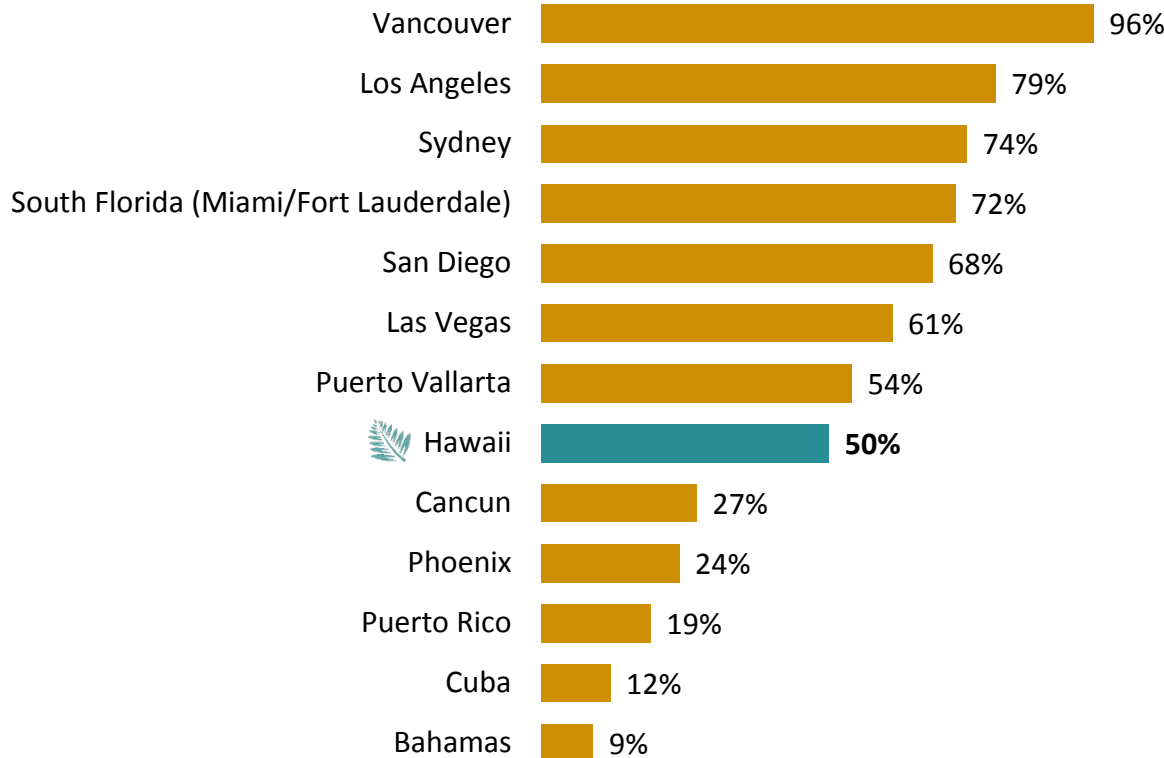


LGBT-Friendly Rating: Hawai'i LGBT-friendly rating among Canadian participants is not great. Only half rated the destination positively (compared to 75% for USA residents). Destinations like Puerto Vallarta and Las Vegas scored higher than Hawai'i. This lukewarm LGBT-friendly rating may indicate that additional education is needed about Hawai'i to Canadian LGBT travelers.



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)





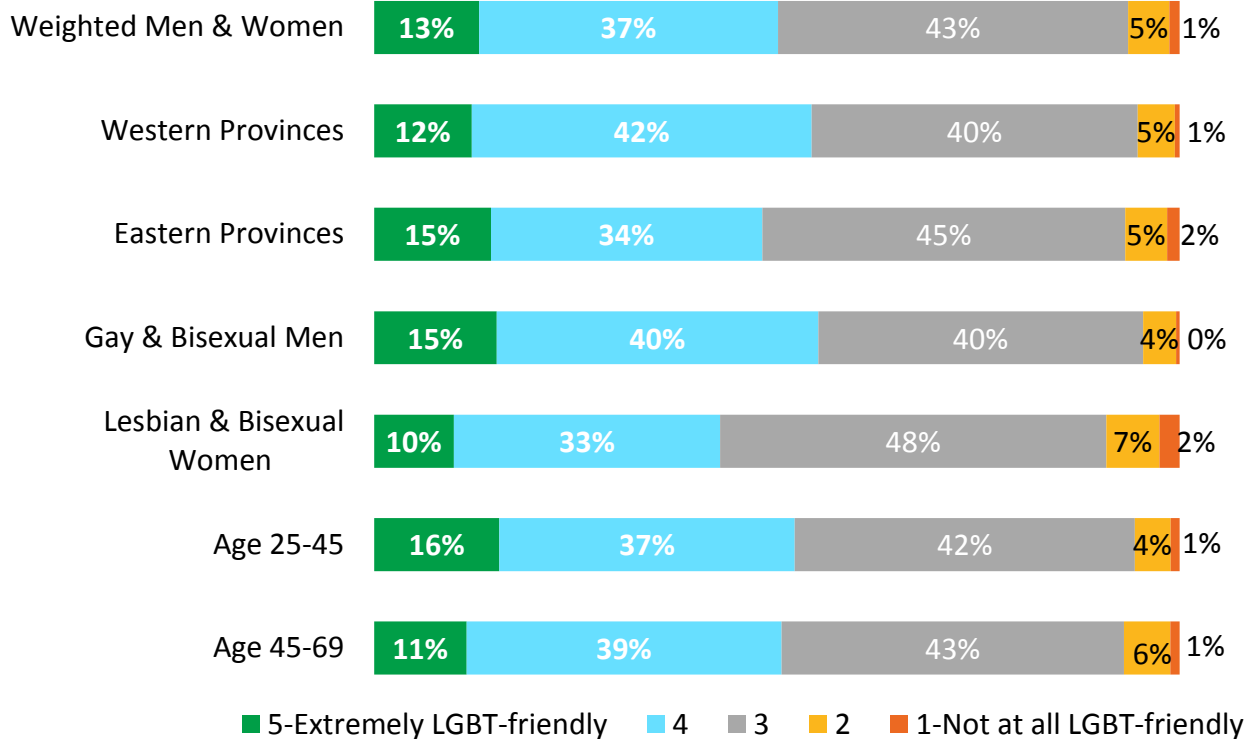
LGBT-Friendly Rating by Demographic: Evaluating Hawai'i's LGBT-friendly rating by demographic, very few see Hawai'i as LGBT-unfriendly. However, far more were likely to rate Hawai'i as a 4 than a 5, with a significant number rating it a more average 3. The LGBT-friendly ratings by demographic were similar, with perhaps some weakness for lesbians.



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



HAWAII TOURISM

AUTHORITY

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 for all demographics. These motivations were very similar to the USA LGBT participants.



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

	Weighted Men & Women	Gay & Bi Men	Lesbian & Bi Women	Age 25-45	Age 45-69	5-Year Visitors
It's a great chance to rest and relax	79%	76%	83%	80%	76%	77%
To experience other cultures	72%	76%	67%	70%	74%	73%
I can explore and do new things	69%	72%	65%	73%	66%	72%
To learn new things	56%	58%	52%	53%	59%	59%
To connect with my spouse or partner	55%	41%	74%	58%	47%	55%
I feel alive and energetic when I travel	53%	52%	53%	54%	51%	60%
To be outdoors and experience nature	50%	46%	55%	56%	43%	55%
To seek adventure	48%	49%	47%	57%	39%	46%
To see for myself the authentic things I have read or heard about	46%	49%	41%	44%	48%	53%
To gain knowledge of history	44%	48%	37%	41%	48%	45%
To celebrate or mark a special occasion	42%	36%	52%	44%	37%	46%
To indulge my passion for food and fine cuisine	42%	41%	44%	47%	36%	50%
To do activities I can only do on vacation	41%	44%	37%	44%	40%	41%
To spend more quality time with my family	32%	23%	45%	34%	28%	34%
To spend more time with my friends	29%	28%	31%	31%	28%	33%
I can splurge on myself when I travel	27%	27%	26%	31%	22%	32%
To engage in my hobbies	15%	11%	21%	17%	13%	16%
I can be more extravagant when I travel	13%	12%	14%	14%	11%	13%
To be the first among my friends to do something	6%	10%	1%	9%	5%	7%
Other reason, please specify:	5%	5%	4%	5%	5%	6%





LGBT Motivations to Take Vacations

Gender Differences: *Where Lesbians Care More than Gay Men*



Connect with my spouse or partner

**74% Women
41% Men**



Celebrate or mark a special occasion

**52% Women
36% Men**



Spend more quality time with my family
**45% Women
23% Men**

Generational Differences: *Where Age 25-45 Care More than Age 46-69*



Indulge my passion for food and fine cuisine

**47% Age 25-45
36% Age 46-69**

Be outdoors and experience nature

**56% Age 25-45
43% Age 46-69**



Seek Adventure

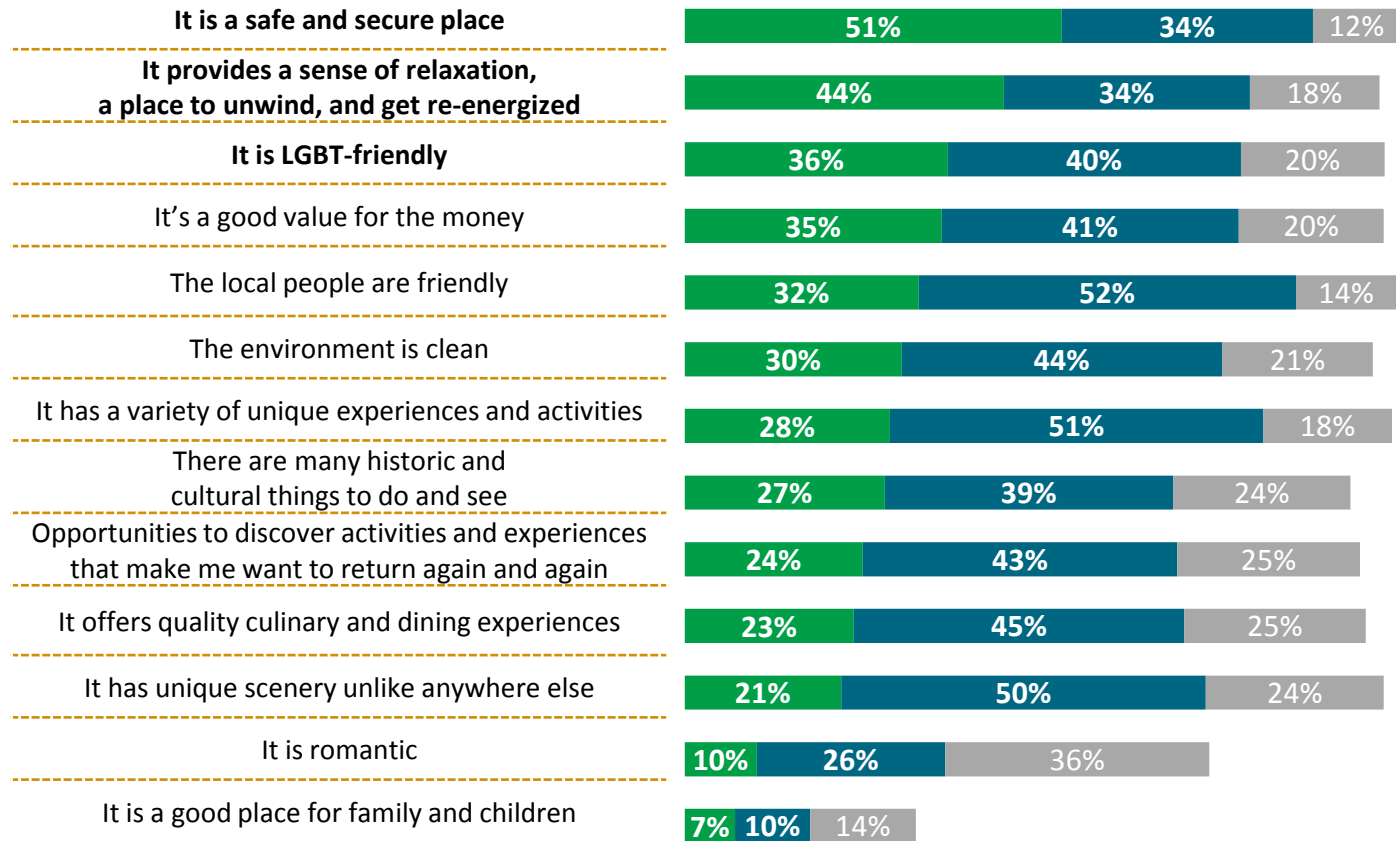
**57% Age 25-45
39% Age 46-69**



Travel Attributes: When traveling more than 500 miles to any destination, nearly all attributes scored 3 or above on the 5-point scale. The nuance is on the level of importance. Safety is the top attribute needed, followed by rest and relaxation. These motivations were very similar to the USA LGBT participants.



On a 5-point scale, when choosing a vacation of 500 or more miles away from home, how important are the following attributes to you in a destination?



■ 5-Extremely important ■ 4 ■ 3



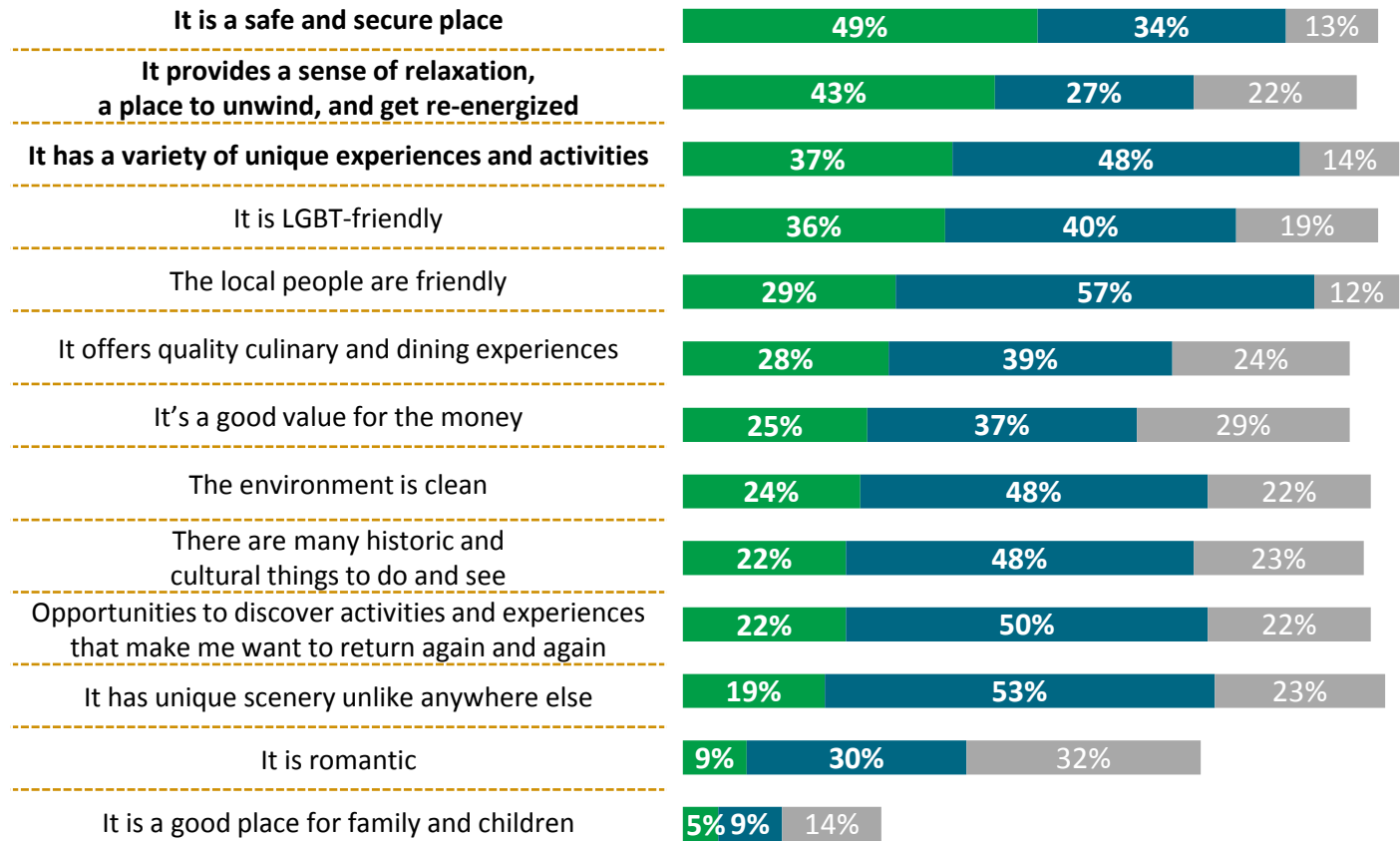
Travel Attributes for Hawai'i Visitors: Compared to the all LGBT group, most attribute ratings to any destination were similar for recent Hawai'i visitors. The biggest differences were an increased importance for varied and unique experiences for the recent Hawai'i visitors.



On a 5-point scale, when choosing a vacation of 500 or more miles away from home, how important are the following attributes to you in a destination?



Among Hawai'i Visitors in the past 5 years



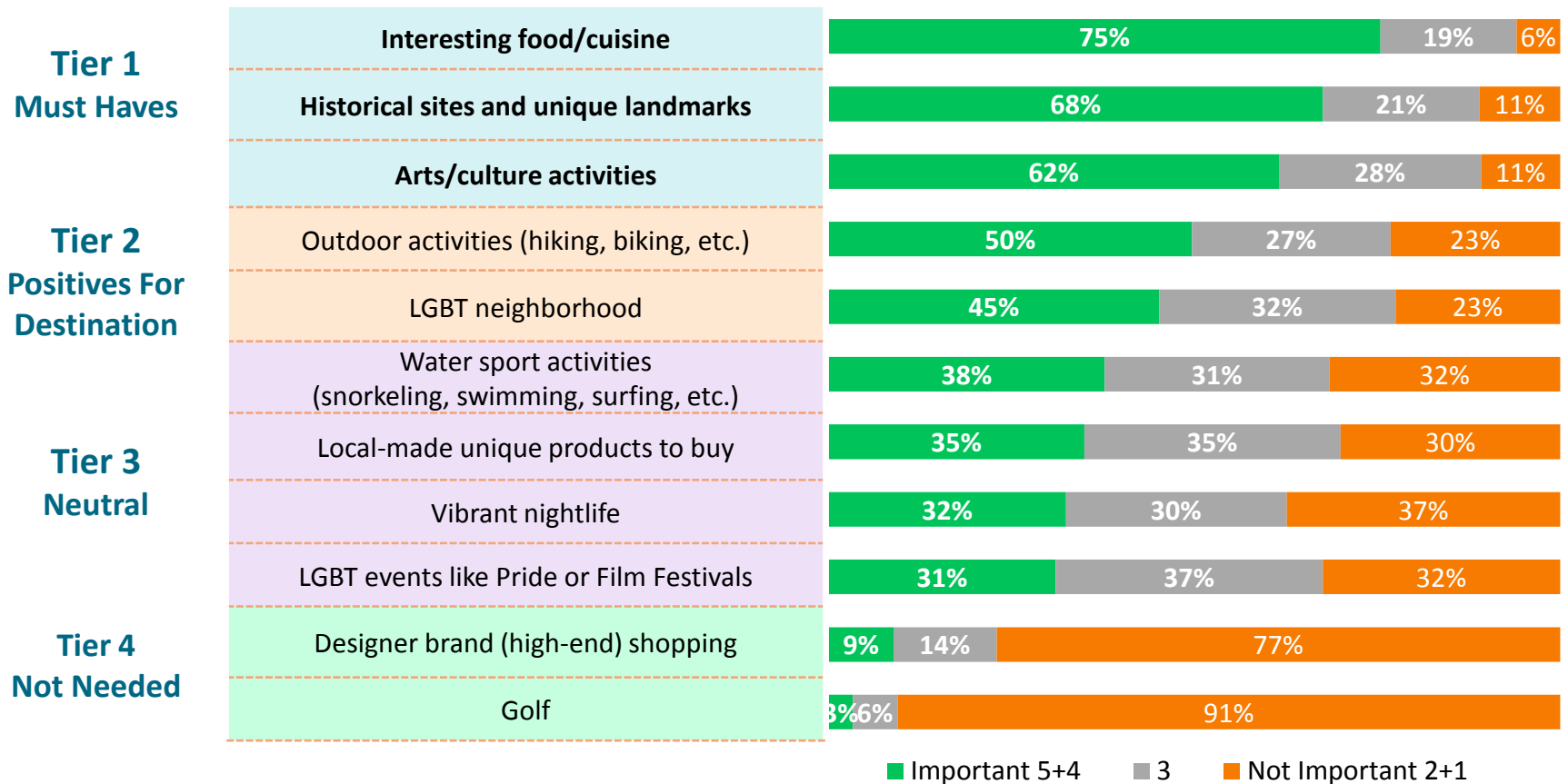
■ 5-Extremely important ■ 4 ■ 3



Travel Activities: When traveling more than 500 miles to any destination, there are some distinctions in preferred activities. The top three interests for the entire LGBT community are food, history and culture. Of note was that golf and shopping scored especially low. LGBT-specific activities were more in the middle for importance. These motivations were very similar to the USA LGBT participants.



On a 5-point scale, when selecting a vacation destination of 500 or more miles away from home, how important is it to you that the destination have the follow attractions and activities?



■ Important 5+4 ■ 3 ■ Not Important 2+1



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



On a 5-point scale, when selecting a vacation destination of 500 or more miles 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	Gay & Bi Men	Lesbian & Bi Women	Age 25-45	Age 45-69
	Interesting food/cuisine	76%	74%	76%
Historical sites and unique landmarks	72%	61%	62%	74%
Arts/culture activities (museums, art galleries, festivals, etc.)	66%	55%	61%	62%
LGBT neighborhood	47%	42%	48%	43%
Outdoor activities (hiking, biking, etc.)	46%	55%	53%	45%
Vibrant nightlife	35%	28%	39%	28%
Local-made unique products to buy	33%	37%	35%	34%
Water sport activities (snorkeling, swimming, surfing, etc.)	30%	49%	39%	34%



HAWAII TOURISM

AUTHORITY

Section 6
Profile of Last
Trip to Any
Destination





Section Summary: Profile of Last Trip to Any Destination



The survey asked participants to think back to last time that they took a vacation 500 or more miles away from their home and write down that destination. Then the survey asked some specific questions about that trip. Since the survey was administered in August 2016, the last trip was more summer oriented.



Timing could somewhat effect results, if the survey had been administered at a different time of the year. Of survey participants, 5% wrote a Hawai'i destination.

The typical LGBT trip profile:



- 56% had a travel party of two and 28% traveled alone. Only 16% had travel parties of more than two.
- The average trip was 7 nights.



- 23% used some type of pre-paid, inclusive tour package. That package typically included accommodations (92%) and meals (80%), with some packages also including attractions (27%), guided tours (16%) and airfare (77%). These percentages are very different than the USA report.



- Of those who stayed in a paid accommodation (taking away those who were on a cruise, or stayed at a friend or relative's house), 70% stayed at a hotel.
- Males tended to spend more than females; older LGBT community members spent more than younger LGBTs.



Profile of Participants' Last Vacation to Any Destination

Think back to last time you took a vacation 500 or more miles away from your home. Please write the destination in which you traveled to. Note that month of survey (August 2016) does somewhat influence these results for the "last" vacation.

Any Destination in Europe	20%
Any Destination in Canada	16%
Any Destination in Mexico	14%
Any Destination in Caribbean	10%
Any Destination in Florida	4%
Any Destination in California	4%
Las Vegas	3%

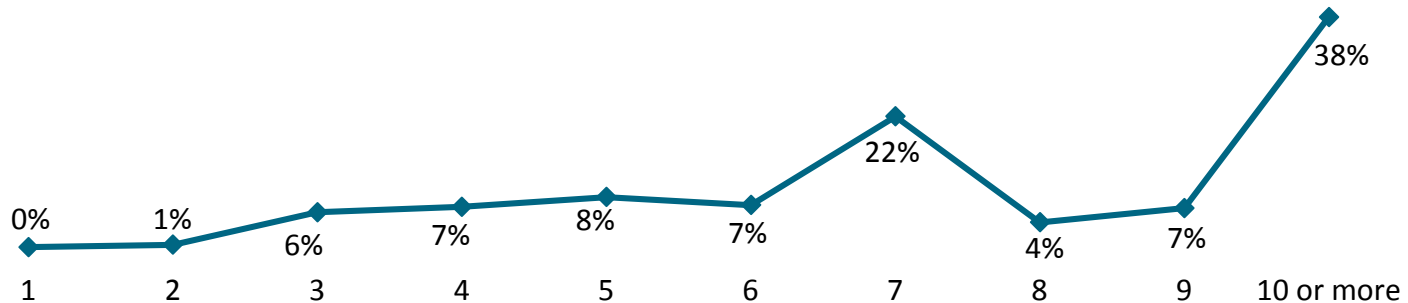
5%

(18) visited any island in Hawai'i



The 8 broad destinations above reflect **74%** of all written destinations.

How many nights did you spend during the above trip?



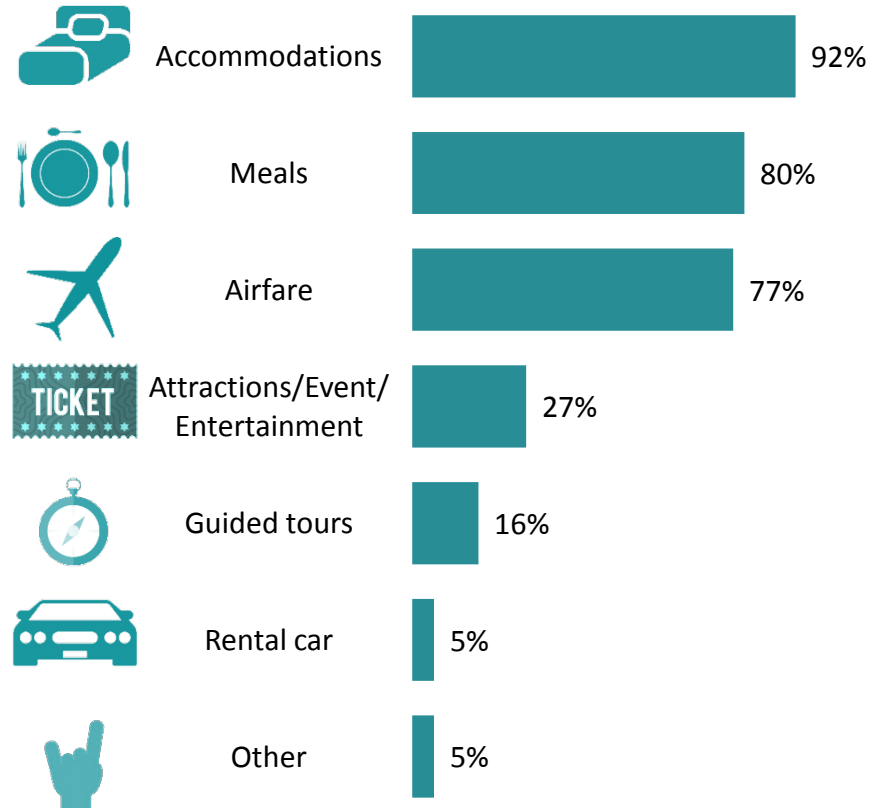


Profile of Participants' Last Vacation to Any Destination

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 500 or more miles away, where did you stay?

	Weighted Men & Women	Gay & Bi Men	Lesbian & Bi Women	Age 25-45	Age 45-69
Hotel	60%	63%	55%	64%	57%
Friends or relatives	22%	20%	25%	21%	22%
Rental house	13%	12%	16%	17%	9%
Bed & breakfast	8%	11%	3%	9%	8%
Condominium	7%	9%	3%	6%	9%
Cruise ship	5%	6%	3%	3%	5%
Private room in private home	4%	4%	4%	4%	3%
Timeshare unit	4%	2%	6%	3%	3%
Hostel	3%	2%	3%	3%	2%
Campsite, beach	2%	2%	3%	2%	2%
Other: Airbnb, HomeAway, VRBO	2%	1%	2%	2%	2%
Shared room/space in private home	0%	1%	0%	1%	1%
Other	0%	0%	0%	1%	0%



Profile of Participants' Last Vacation to Any Destination



During the trip to your last vacation 500 or more miles away, where did you stay?

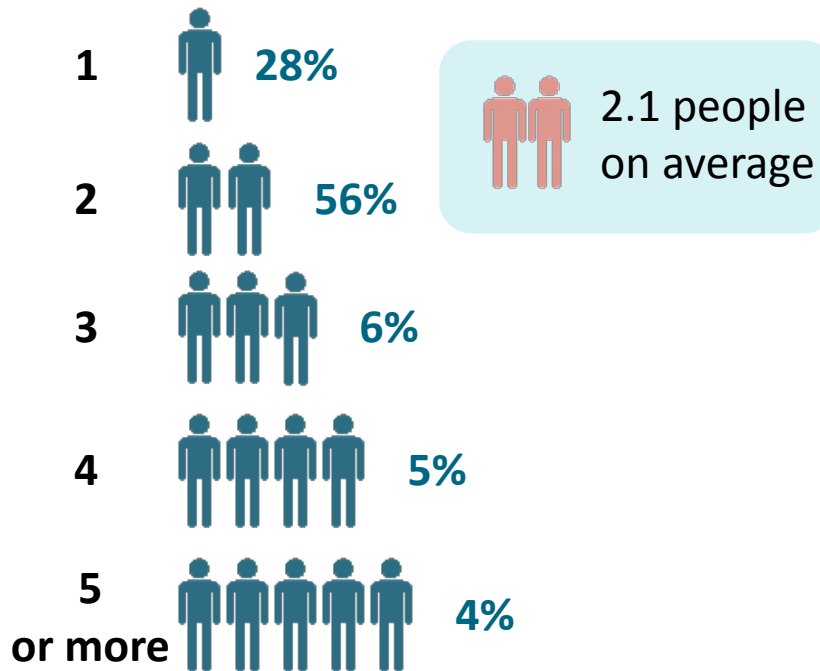
Focused: Among those who didn't stay at a cruise ship, friend's or relative's place or selected "other"

	Weighted Men & Women	Gay & Bi Men	Lesbian & Bi Women	Age 25-45	Age 45-69
Hotel	70%	73%	66%	72%	68%
Rental house	15%	13%	19%	19%	11%
Bed & breakfast	9%	13%	4%	10%	10%
Condominium	8%	11%	4%	6%	11%
Private room in private home	5%	4%	5%	5%	4%
Timeshare unit	4%	2%	7%	3%	4%
Hostel	3%	2%	4%	3%	3%
Campsite, beach	3%	2%	4%	2%	2%
Other: Airbnb, HomeAway, VRBO	2%	1%	3%	2%	2%
Shared room/space in private home	1%	1%	0%	1%	1%



Profile of Participants' Last Vacation to Any Destination

of People on Trip



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

Weighted Men & Women	\$ 2,131
Men	\$ 2,652
Women	\$ 1,587
Age 25-45	\$ 1,881
Age 46-69	\$ 2,559





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	**Excluding the pre-paid amount**						Total	Grand Total
		Dining, Food, Beverage	Entertainment & Recreation	Transportation	Shopping	Lodging	Others		
Weighted Men & Women	\$ 2,582	\$ 219	\$ 262	\$ 468	\$ 369	\$ 139	\$ 134	\$ 1,591	\$ 4,173
Men	\$ 2,855	\$ 258	\$ 212	\$ 599	\$ 424	\$ 216	\$ 134	\$ 1,843	\$ 4,698
Women	\$ 2,190	\$ 163	\$ 335	\$ 278	\$ 290	\$ 28	\$ 133	\$ 1,227	\$ 3,417
Age 25-45	\$ 2,435	\$ 181	\$ 328	\$ 251	\$ 311	\$ 71	\$ 112	\$ 1,254	\$ 3,689
Age 46-69	\$ 2,505	\$ 225	\$ 219	\$ 617	\$ 385	\$ 150	\$ 161	\$ 1,757	\$ 4,262

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
Weighted Men & Women	\$ 806	\$ 468	\$ 1,514	\$ 362	\$ 1,111	\$ 374	\$ 4,634	\$ 4,634
Men	\$ 801	\$ 495	\$ 1,492	\$ 383	\$ 1,298	\$ 381	\$ 4,851	\$ 4,851
Women	\$ 812	\$ 428	\$ 1,547	\$ 331	\$ 841	\$ 363	\$ 4,322	\$ 4,322
Age 25-45	\$ 753	\$ 507	\$ 1,294	\$ 418	\$ 1,005	\$ 322	\$ 4,300	\$ 4,300
Age 46-69	\$ 851	\$ 448	\$ 1,702	\$ 323	\$ 1,319	\$ 425	\$ 5,068	\$ 5,068

Among All LGBT

(Per Person in the Following Travel Party)

Weighted Men & Women	\$ 2,131	Age 25-45	\$ 1,881
Men	\$ 2,652	Age 46-69	\$ 2,559
Women	\$ 1,587		



Profile of Canada Participants' Last Vacation to Any Destination

	Package people n=70	Non-package people n=267
Avg. No. of people on trip	2.2	1.9
Avg. No. of nights on trip	7.5	7.6

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

Dining, Food, Beverage	\$ 60.29
Entertainment & Recreation	\$ 34.34
Shopping	\$ 29.22
Lodging	\$ 91.66
Others	\$ 24.60

HAWAII TOURISM

AUTHORITY

Section 7
LGBT Hawai'i
Travel





Lifetime Visits to Hawai'i: 43% of the LGBT Canadian participants had visited Hawai'i at some point in their life. Gay men, those living in the Western provinces and older LGBTs were the most likely to have visited at least once in the past, and to be more frequent visitors.



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

	Weighted Men & Women	Western Provinces	Eastern Provinces	Gay & Bisexual Men	Lesbian & Bisexual Women	Age 25-45	Age 46-69
Never visited Hawai'i before as an adult	57%	42%	67%	49%	69%	64%	47%
1-2	29%	35%	24%	31%	26%	30%	29%
3-5	8%	11%	6%	10%	4%	4%	13%
6 or more	6%	12%	3%	10%	1%	2%	11%





Most Recent Visits to Hawai'i: Of the LGBT research participants, 6% indicated a visit to Hawai'i in the past year and 27% in the past five years (these percentages are comparable to the USA report percentages). The overall trend in this report is that Hawai'i is most popular with gay men, older community members and LGBTs living in the Western provinces.

Visited in Past Year	Weighted Men & Women	Western Provinces	Eastern Provinces	Gay & Bisexual Men	Lesbian & Bisexual Women	Age 25-45	Age 46-69
Count		N=18	N=6	N=19	N=5	N=8	N=13
Of All Participants	6%	10%	3%	8%	4%	4%	7%

Visited in Past Five Years	Weighted Men & Women	Western Provinces	Eastern Provinces	Gay & Bisexual Men	Lesbian & Bisexual Women	Age 25-45	Age 46-69
Count		N=67	N=36	N=78	N=24	N=44	N=54
Of All Participants	27%	39%	19%	32%	20%	24%	31%

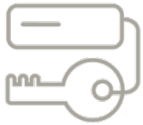
Ever Visited Hawai'i	Weighted Men & Women	Western Provinces	Eastern Provinces	Gay & Bisexual Men	Lesbian & Bisexual Women	Age 25-45	Age 46-69
Count		N=101	N=63	N=125	N=38	N=64	N=92
Of All Participants	43%	58%	33%	51%	31%	36%	53%



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. When analyzed by gender, differences were minor.



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



Among Weighted Men & Women

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



An LGBT-dedicated hotel, resort or guesthouse



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

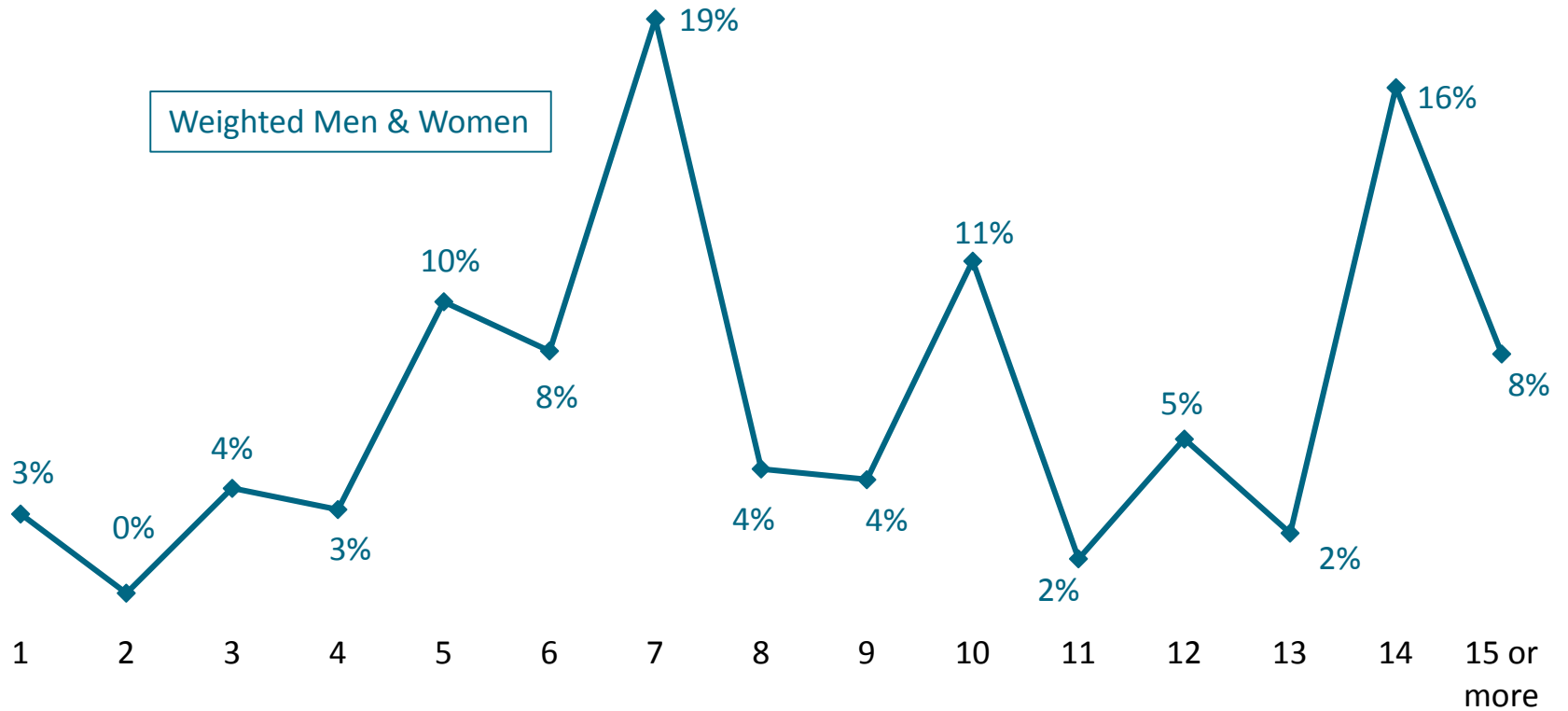




Hotel Night Distribution: The median number of nights for LGBT visitors is eight.



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



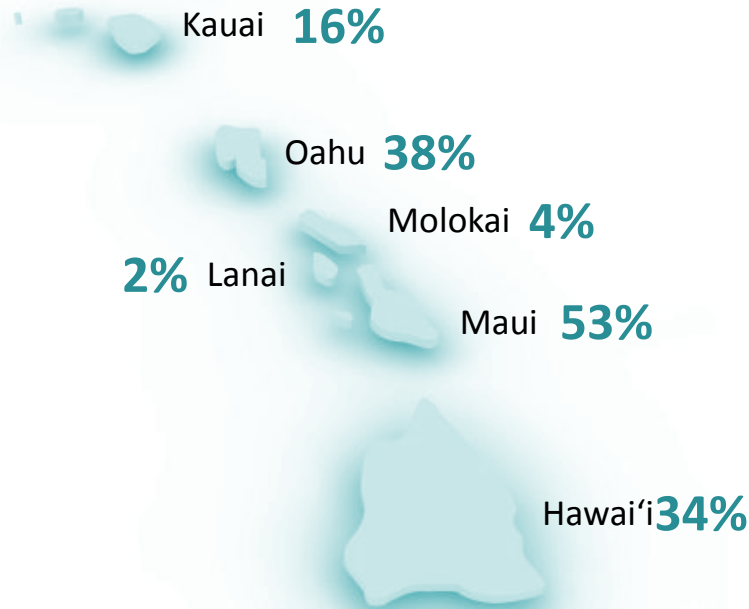


Preferred Island: LGBTs from Canada visit all Hawaiian islands, but there appears to be a stronger preference for Maui.

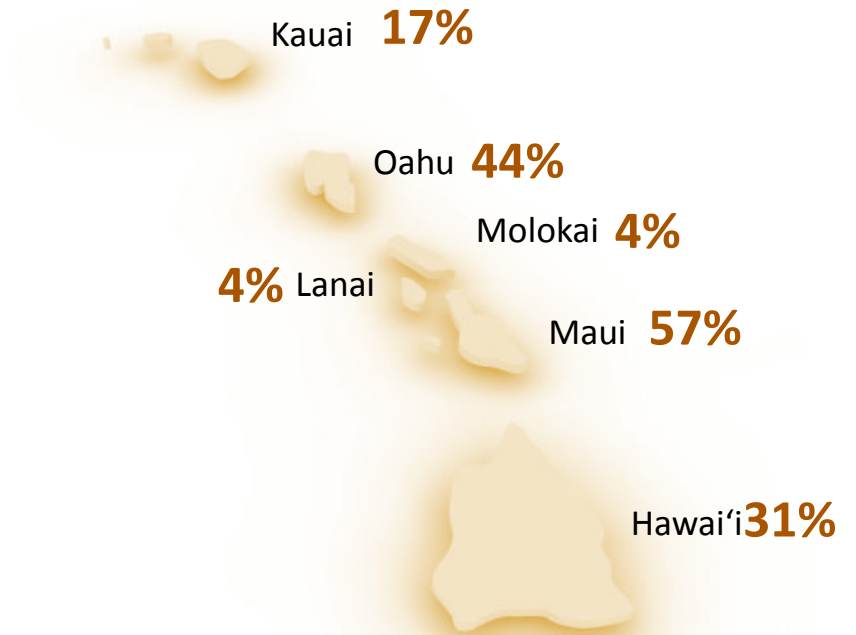


On your last trip to Hawai'i, what islands did you visit? (Please mark all that apply)

Visit Any Time During Life.
Weighted Male and Female



Past Five Year Visitors

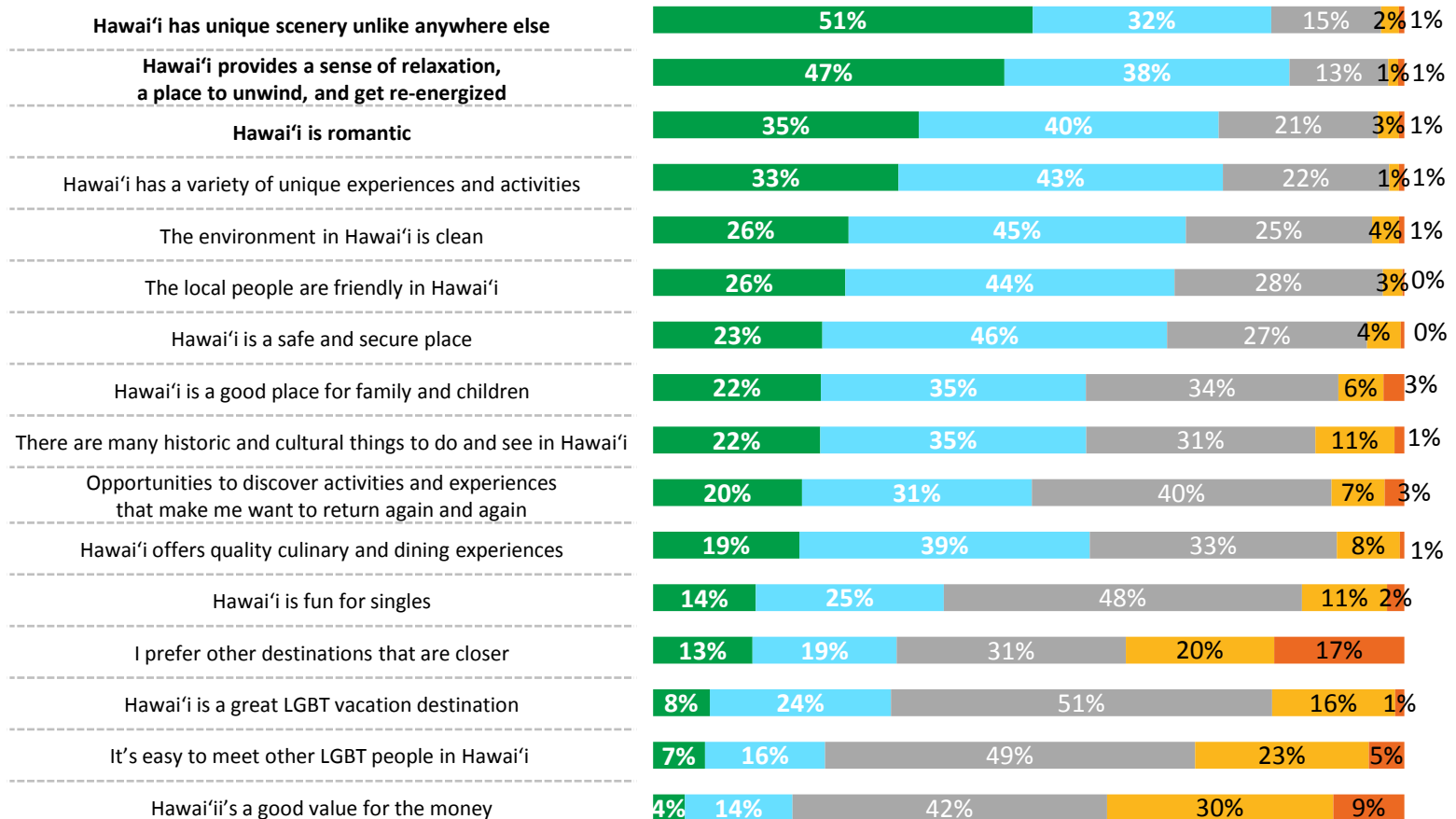




Hawai'i Attributes: Canadian LGBTs are most likely to agree that Hawai'i has unique scenery unlike anywhere else, provides a sense of relaxation, a place to unwind, get re-energized and is romantic. They are least likely to agree that Hawai'i is a good value for the money and it's easy to meet other LGBT people in Hawai'i.



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.



5-Strongly Agree 4 3 2 1-Strongly Disagree



Hawai'i Attributes by Gender



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 Gay & Bi Men			Among Lesbian & Bi Women		
	Agree 5+4	Neutral 3	Disagree 2+1	Agree 5+4	Neutral 3	Disagree 2+1
Hawai'i provides a sense of relaxation, a place to unwind, and get re-energized	83%	15%	2%	88%	11%	2%
Hawai'i has unique scenery unlike anywhere else	79%	17%	4%	88%	11%	2%
Hawai'i has a variety of unique experiences and activities	76%	21%	3%	76%	23%	1%
The environment in Hawai'i is clean	74%	21%	5%	67%	30%	3%
Hawai'i is a safe and secure place	71%	24%	5%	64%	31%	5%
Hawai'i is romantic	71%	24%	5%	82%	17%	1%
The local people are friendly in Hawai'i	70%	26%	4%	69%	30%	2%
Hawai'i offers quality culinary and dining experiences	60%	30%	9%	55%	36%	8%
Hawai'i is a good place for family and children	58%	32%	10%	57%	36%	7%
There are many historic and cultural things to do and see in Hawai'i	56%	30%	13%	60%	31%	10%
Opportunities to discover activities and experiences that make me want to return again and again	48%	38%	14%	54%	42%	4%
Hawai'i is fun for singles	40%	44%	16%	36%	53%	11%
Hawai'i is a great LGBT vacation destination	34%	47%	19%	28%	56%	16%
I prefer other destinations that are closer	34%	33%	33%	31%	26%	43%
It's easy to meet other LGBT people in Hawai'i	30%	44%	26%	13%	56%	31%
Hawai'i's a good value for the money	18%	46%	37%	20%	36%	44%





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 25-45			Among Age 46-69		
	Agree 5+4	Neutral 3	Disagree 2+1	Agree 5+4	Neutral 3	Disagree 2+1
Hawai'i provides a sense of relaxation, a place to unwind, and get re-energized	90%	10%	0%	79%	17%	5%
Hawai'i has unique scenery unlike anywhere else	84%	14%	2%	79%	15%	6%
Hawai'i is romantic	79%	19%	1%	70%	23%	7%
Hawai'i has a variety of unique experiences and activities	74%	24%	2%	76%	21%	3%
The local people are friendly in Hawai'i	72%	25%	3%	67%	29%	4%
The environment in Hawai'i is clean	72%	26%	3%	71%	22%	7%
Hawai'i is a safe and secure place	68%	29%	3%	69%	24%	7%
Hawai'i is a good place for family and children	65%	28%	7%	50%	38%	12%
Hawai'i offers quality culinary and dining experiences	58%	34%	8%	59%	31%	10%
Opportunities to discover activities and experiences that make me want to return again and again	55%	40%	5%	44%	40%	16%
There are many historic and cultural things to do and see in Hawai'i	54%	34%	11%	60%	27%	13%
Hawai'i is fun for singles	44%	42%	14%	33%	52%	14%
I prefer other destinations that are closer	34%	28%	38%	32%	36%	33%
Hawai'i is a great LGBT vacation destination	30%	56%	14%	34%	45%	21%
It's easy to meet other LGBT people in Hawai'i	23%	51%	26%	26%	45%	29%
Hawai'i's a good value for the money	16%	44%	39%	20%	40%	40%



Hawai'i LGBT 5-Year Visitors Profile



Provinces	
British Columbia	37%
Alberta	28%
Ontario	24%
Generation	
Millennials	16%
Gen X	39%
Baby Boomers	43%

Relationship Status	
Partnered	68%
Single	32%
Income	
Less than \$100k	22%
\$100k to less than 150k	33%
\$150k to less than 200k	22%
\$200k or more	21%

69% Rate Hawai'i as LGBT-friendly

Islands visited during last trip to Hawai'i

Maui	57%
Oahu	44%
Hawai'i or The Big Island	31%
Kauai	17%
Molokai	4%
Lanai	4%

Hawai'i provides a sense of relaxation, a place to unwind, and get re-energized	92% Agree
The environment in Hawai'i is clean	90% Agree
Hawai'i has unique scenery unlike anywhere else	88% Agree
Hawai'i has a variety of unique experiences and activities	86% Agree
Hawai'i is romantic	84% Agree
The local people are friendly in Hawai'i	83% Agree

HAWAII TOURISM

AUTHORITY

Section 8
LGBT-Specific
Programming and
Events

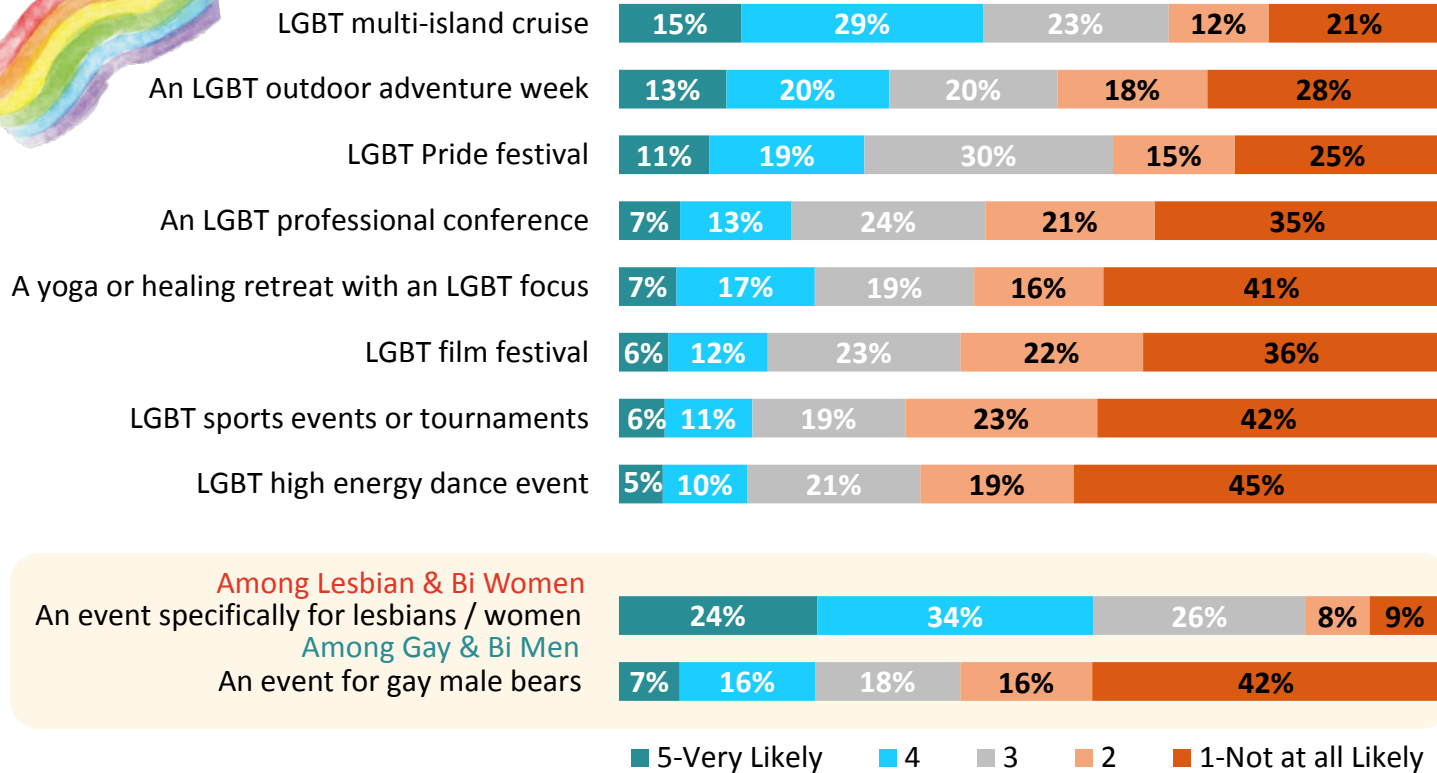




LGBT Programming: Analyzing the entire LGBT participant group, no LGBT-specific program or event had overwhelming support to encourage travel to the islands. There was surprising support for an LGBT outdoor adventure week, as it ranked similar to Pride.



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?





LGBT Programming by Demographic: However, looking at the data by demographic, increased visitation for targeted demographics may be able to be increased by specific LGBT programming. Younger LGBTs have the most interest in Pride in Hawai'i and in general they are more interested in LGBT events. LGBT events could be a catalyst for a first vacation to Hawai'i for younger LGBTs.



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	Among Gay & Bi Men	Among Lesbian & Bi Women	Age 25-45	Age 46-69
LGBT multi-island cruise	40%	51%	45%	42%
An LGBT outdoor adventure week	29%	39%	37%	27%
LGBT Pride festival	26%	36%	39%	20%
An LGBT professional conference	21%	21%	22%	20%
A yoga or healing retreat with an LGBT focus	20%	30%	26%	21%
LGBT film festival	15%	22%	20%	15%
LGBT high energy dance event	13%	20%	21%	10%
LGBT sports events or tournaments	13%	21%	19%	11%
An event for gay male bears	24%	0%	30%	21%
An event specifically for lesbians / women	0%	58%	56%	63%

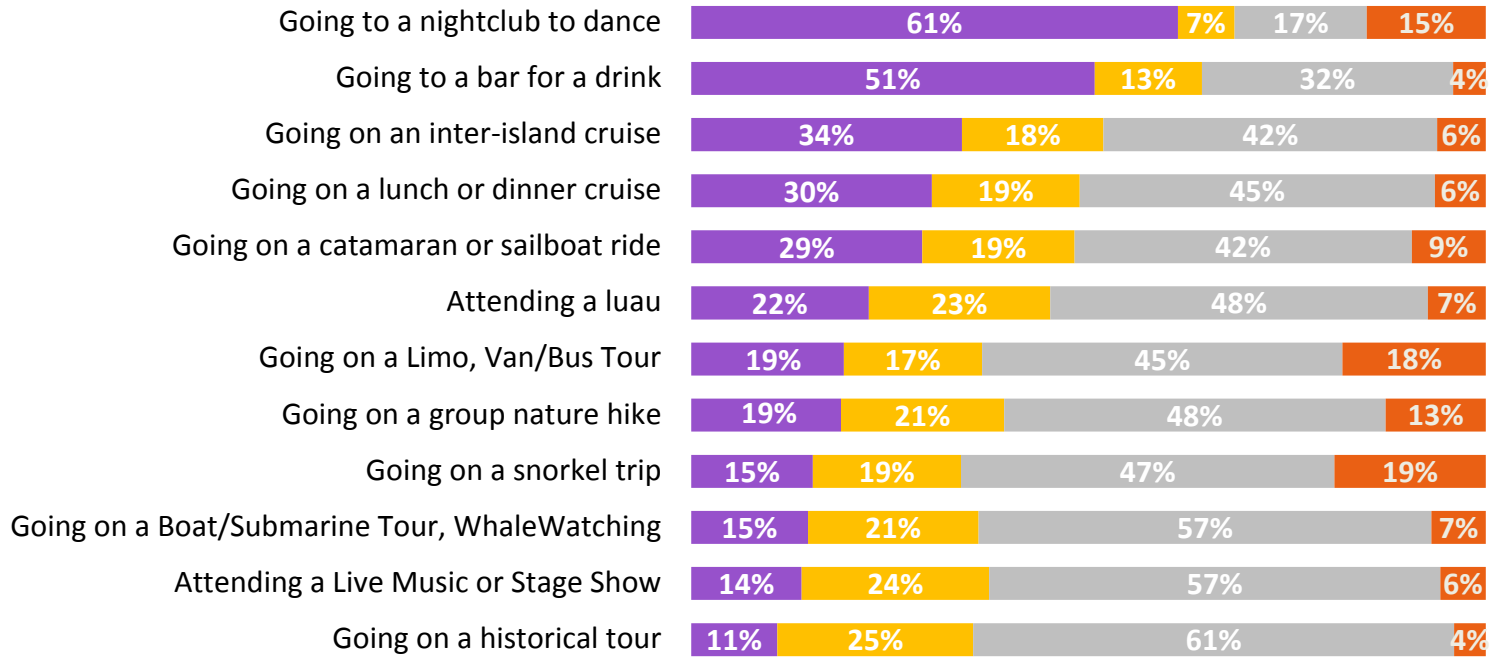




LGBT-specific Activities: There is support for LGBT-specific gay bars and nightclubs on the islands. The appeal for other LGBT-specific activities is more limited. But the results do show that perhaps 1 in 5 LGBTs prefer activities that are all LGBT groups.



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?



■ Prefer activity to be an LGBT group
 ■ Prefer activity to be a mix of people
■ Either LGBT or mixed group is fine
 ■ Would not do this activity



Gender 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?

	Gay & Bi Men who prefer the activity to be in a....			Lesbian & Bi Women 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	61%	6%	17%	61%	9%	16%
Going to a bar for a drink	54%	12%	30%	46%	16%	34%
Going on an inter-island cruise	33%	18%	44%	36%	17%	40%
Going on a catamaran or sailboat ride	32%	18%	40%	25%	21%	45%
Going on a lunch or dinner cruise	28%	18%	47%	33%	20%	42%
Attending a luau	22%	23%	46%	23%	23%	50%
Going on a group nature hike	19%	21%	47%	18%	20%	50%
Going on a Limo, Van/Bus Tour	19%	17%	45%	19%	18%	45%
Going on a snorkel trip	16%	19%	44%	15%	18%	51%
Going on a Boat/Submarine Tour, WhaleWatching	14%	23%	56%	16%	20%	58%
Going on a historical tour	12%	25%	60%	10%	24%	61%
Attending a Live Music or Stage Show	9%	27%	57%	21%	19%	56%





Generation Comparisons



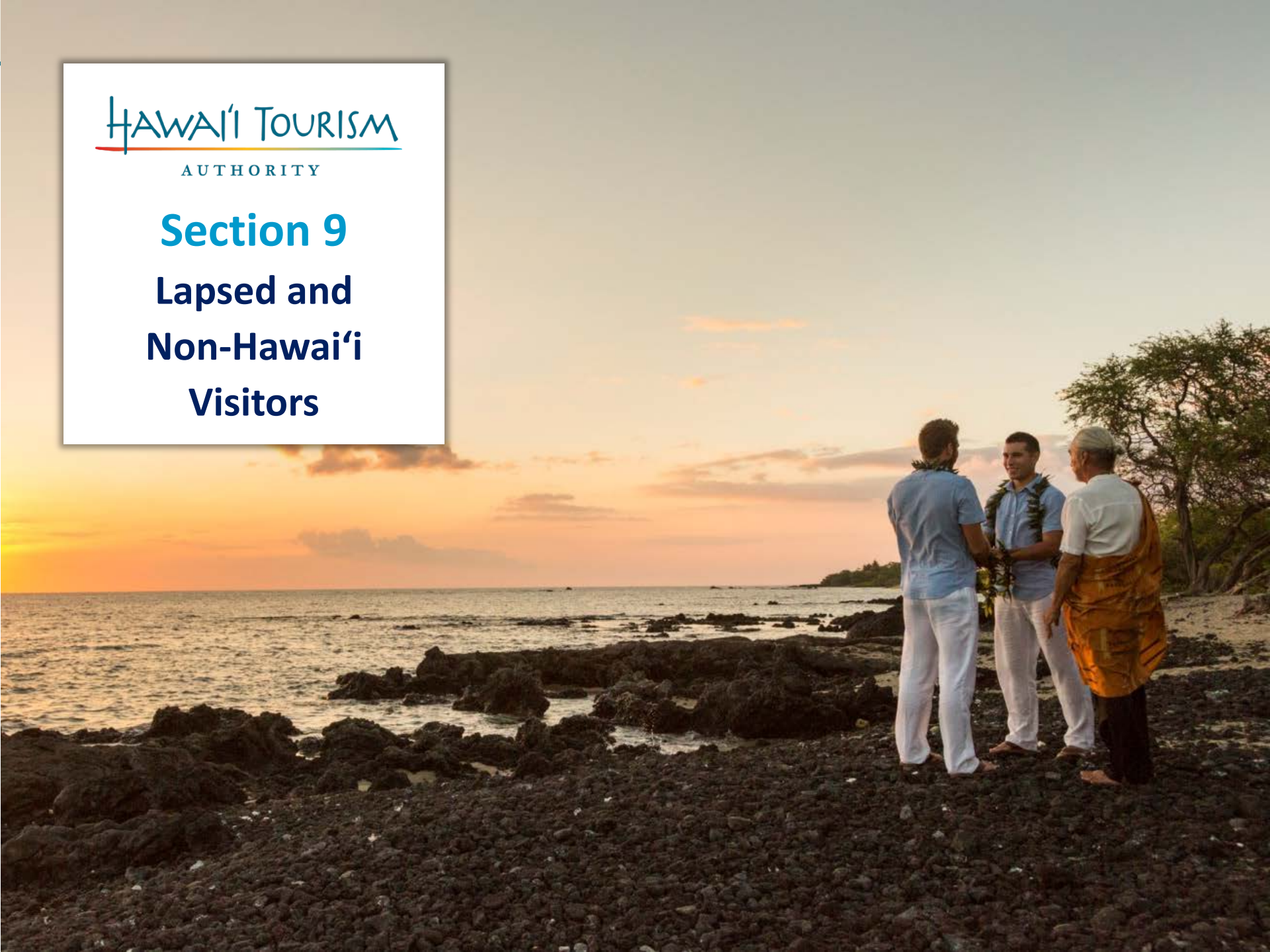
When traveling to Hawai'i, how important is it to you that the following activities are dedicated to LGBT community members vs. a mix of all people?

	Age 25-45 who prefer the activity to be in a...			Age 46-69 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	62%	8%	20%	63%	5%	13%
Going to a bar for a drink	48%	15%	36%	56%	11%	27%
Going on an inter-island cruise	34%	18%	43%	34%	16%	41%
Going on a lunch or dinner cruise	25%	21%	51%	36%	15%	40%
Going on a catamaran or sailboat ride	24%	21%	49%	36%	17%	36%
Attending a luau	19%	24%	53%	26%	20%	43%
Going on a Limo, Van/Bus Tour	19%	18%	44%	20%	17%	45%
Going on a snorkel trip	15%	20%	50%	16%	17%	44%
Going on a group nature hike	15%	22%	53%	24%	18%	43%
Attending a Live Music or Stage Show	12%	27%	59%	14%	20%	56%
Going on a Boat/Submarine Tour, WhaleWatching	11%	23%	61%	18%	20%	53%
Going on a historical tour	8%	27%	62%	14%	22%	59%

HAWAII TOURISM

AUTHORITY

Section 9
Lapsed and
Non-Hawai'i
Visitors





Non-Visitor Consideration: Almost half of LGBT non-visitors indicated that they had previously considered traveling to Hawai'i but decided not to visit. Demographically, the "consider" rate is relatively stable.

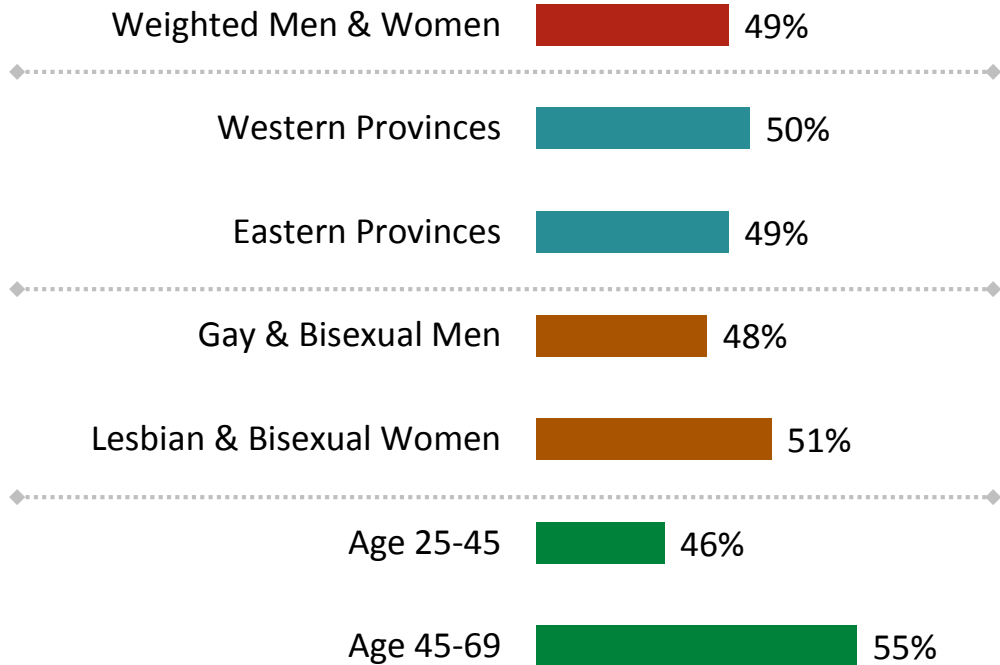


Have you previously considered visiting Hawai'i but decided not to after all?

Among Those Who Never Visited Hawai'i as an Adult

Yes

I have previously considered visiting Hawai'i but decided not to after all.





Reasons for Lapsed Visitors and Non-Visitors: The reasons that LGBTs do not visit Hawai'i are purely practical. There appears to be no negative LGBT-specific reasons for not visiting.



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



43%



Better value at another destination



43%



Not enough time to travel



19%



Flight to Hawaii is too long



18%

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

Not enough LGBT-dedicated activities **Only 5%**

Hawai'i is not an LGBT friendly destination **Only 4%**

Not recommended by family or friends **Only 2%**



Expanded Reasons for Lapsed Visitors and Non-Visitors by Demographic



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

	Weighted Men & Women	Gay & Bi Men	Lesbian & Bi Women	Age 25-45	Age 45-69
Financial reasons/travel costs	43%	37%	53%	48%	39%
Better value at another destination	43%	39%	48%	48%	38%
Not enough time to travel	19%	16%	23%	19%	20%
Flight to Hawai'i is too long	18%	17%	20%	14%	21%
Been there and prefer other destinations	17%	23%	7%	12%	22%
Not sure which island(s) In Hawai'i to visit	15%	13%	17%	19%	10%
Not familiar with what there is to see and do in Hawai'i	11%	12%	9%	11%	10%
Prefer destinations closer to home	8%	7%	9%	6%	10%
No family or friends to visit there	7%	7%	8%	6%	8%
Not enough LGBT-dedicated activities	5%	7%	1%	4%	6%
Hawai'i is not an LGBT friendly destination	4%	5%	3%	3%	5%
Not interested	3%	4%	1%	2%	4%
Not recommended by family or friends	2%	2%	2%	1%	3%
On the list, will visit for sure	1%	1%	2%	2%	1%
Safety concerns in Hawai'i	1%	2%	1%	1%	3%
Have young children at home and cannot travel long distances	1%	1%	2%	0%	2%
Been there and had a bad experience	0%	1%	0%	1%	0%
Never gave it a thought	0%	1%	0%	0%	1%
Other reasons	3%	4%	2%	3%	4%

HAWAII TOURISM

AUTHORITY

Section 10
Marketing
And Outreach





Section Summary: Marketing and Outreach



Marketing and outreach to the Canadian LGBT community can be complex, as there are hundreds of print, digital, social media and event options for the Hawai'i Tourism Authority. These options span LGBT-specific opportunities to general population media popular with the LGBT community. This section covers some of the information learned from this survey to help direct HTA's marketing staff.



In an average week, about 15% of participants look at an LGBT-specific print publication and 43% will look at an LGBT-specific websites. These percentages are slightly lower than USA viewership rates. Gay men are more involved in the LGBT media than lesbians.



The list of LGBT media chosen for the research are mostly USA-based media, and therefore it is not surprising that overall viewership percentages are lower for Canadians. However, advertising in these publications do pick up a substantial number of LGBT Canadians. DailyXtra, the one truly Canadian LGBT media on the list, did have good viewership with gay men and recent Hawai'i visitors.



The list of general population media chosen for the research was also mostly USA-based, and again overall viewership percentages are lower for Canadians. However, advertising in these publications does pick up a substantial number of LGBT Canadians.



Social media engagement in the LGBT community is very strong, and across all generations, especially for Facebook. Social media engagement for LGBT Canadians largely matched the USA engagement rates. HTA can target LGBT Canadian travelers on Facebook quite easily for advertising and promotions.



Media Planning Charts: Viewership Rates by Gender, Generation, and Actual Visitors to Hawai‘i



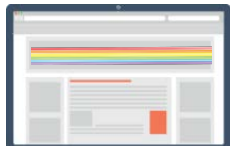
How often do you read LGBT-specific print publications such as LGBT magazines or newspapers?



	Weighted Men & Women	Gay & Bi Men	Lesbian & Bi Women	Age 25-45	Age 46-69	Past 5-Year Visitors
Weekly	15%	20%	7%	14%	17%	21%
Monthly	20%	22%	18%	21%	20%	24%
A few times a year	46%	43%	51%	44%	47%	33%
Never	19%	16%	23%	20%	16%	21%



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



	Weighted Men & Women	Gay & Bi Men	Lesbian & Bi Women	Age 25-45	Age 46-69	Past 5-Year Visitors
Weekly	43%	55%	26%	43%	48%	53%
Monthly	26%	19%	36%	32%	18%	28%
A few times a year	27%	21%	36%	21%	31%	15%
Never	4%	5%	2%	4%	3%	4%

HAWAII TOURISM

AUTHORITY

Section 11

Planning, Booking and In-Destination Motivators





Section Summary: Planning, Booking and In-destination Motivators



The travel planning, booking, and in-destination motivator charts attempts to track the flow of LGBT travel from inspiration of travel to planning/booking a trip, right through to activities at the chosen destination. Four charts are presented to view differences between all LGBT, Hawai'i visitors, and younger and older LGBTs.



Hawai'i visitors may be the most important. Travel Inspiration comes from friends and relatives, mainstream travel websites, and destination websites. LGBT websites and blogs are also important. During the planning and booking stage, the vast majority report self-booking through airline and hotel websites. While in the destination, media attention turns to the use of smart phone apps and guidebooks.



Destination websites, while not a key sources for any one category, scored respectably in all three stages; travel inspiration, planning/booking, and in-destination use. Social media also scored respectably for travel inspiration.



The all LGBT participant group was similar to the Hawai'i visitor group.



We do see some differences by age, especially recommendations by friends and social media having more importance with younger LGBTs



Travel Planning Flow Chart: All Canadian LGBT



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

Among Weighted Men & Women

	Travel Inspiration	Travel Planning and Booking	In-Destination	Do Not Use
Airline website	24%	84%	5%	7%
Online booking sites (e.g., Expedia, Travelocity)	41%	80%	9%	7%
Hotel website	28%	77%	10%	9%
Recommendations from friends or relatives	66%	40%	13%	11%
Destination website	52%	55%	26%	14%
Mainstream travel websites or blogs	53%	33%	10%	26%
LGBT websites or blogs	51%	30%	13%	27%
Social media (e.g., Facebook, Instagram, Pinterest)	50%	25%	18%	33%
Travel apps	28%	40%	30%	36%
Travel guide books (e.g., Fodors, Frommers)	32%	38%	23%	36%
Adventure/outdoor/travel magazines	38%	16%	8%	46%
LGBT magazines	38%	16%	10%	48%
Television/Radio	36%	12%	8%	51%
Travel agent	9%	28%	2%	67%



Travel Planning Flow Chart: Among Age 25-45



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

Among Age 25-45

	Travel Inspiration	Travel Planning and Booking	In-Destination	Do Not Use
Online booking sites (e.g., Expedia, Travelocity)	44%	87%	13%	4%
Airline website	26%	85%	7%	7%
Hotel website	32%	78%	13%	8%
Recommendations from friends or relatives	76%	43%	13%	9%
Destination website	58%	54%	28%	15%
Social media (e.g., Facebook, Instagram, Pinterest)	62%	33%	22%	22%
Mainstream travel websites or blogs	59%	37%	12%	23%
LGBT websites or blogs	54%	33%	14%	27%
Travel apps	31%	43%	39%	36%
Travel guide books (e.g., Fodors, Frommers)	34%	37%	26%	38%
Adventure/outdoor/travel magazines	46%	18%	8%	40%
Television/Radio	38%	13%	8%	47%
LGBT magazines	36%	17%	12%	48%
Travel agent	11%	26%	2%	69%





Travel Planning Flow Chart: Among Age 46-69



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

Among Age 46-69

	Travel Inspiration	Travel Planning and Booking	In-Destination	Do Not Use
Airline website	22%	83%	5%	7%
Hotel website	23%	78%	7%	9%
Online booking sites (e.g., Expedia, Travelocity)	38%	73%	6%	11%
Destination website	46%	56%	27%	11%
Recommendations from friends or relatives	58%	36%	10%	14%
LGBT websites or blogs	49%	28%	15%	25%
Mainstream travel websites or blogs	49%	30%	11%	28%
Travel guide books (e.g., Fodors, Frommers)	32%	40%	22%	34%
Travel apps	25%	39%	25%	36%
Social media (e.g., Facebook, Instagram, Pinterest)	39%	16%	14%	44%
LGBT magazines	41%	14%	9%	45%
Adventure/outdoor/travel magazines	29%	14%	7%	53%
Television/Radio	35%	10%	9%	53%
Travel agent	7%	29%	2%	66%





Travel Planning Flow Chart: Past Hawai'i Visitors



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



Among Hawai'i Visitors in the Past 5 Years



	Travel Inspiration	Travel Planning and Booking	In-Destination	Do Not Use
Airline website	25%	87%	7%	4%
Online booking sites (e.g., Expedia, Travelocity)	44%	81%	12%	7%
Hotel website	29%	81%	8%	10%
Recommendations from friends or relatives	67%	41%	16%	10%
Destination website	55%	60%	29%	10%
Mainstream travel websites or blogs	60%	39%	14%	19%
LGBT websites or blogs	52%	35%	18%	23%
Travel apps	39%	48%	35%	32%
Social media (e.g., Facebook, Instagram, Pinterest)	47%	23%	21%	37%
Travel guide books (e.g., Fodors, Frommers)	37%	43%	22%	37%
LGBT magazines	42%	18%	11%	46%
Adventure/outdoor/travel magazines	39%	14%	9%	50%
Television/Radio	37%	11%	8%	53%
Travel agent	7%	25%	4%	72%



Mahalo...

For more information:

David Paisley, Senior Research Director



584 Castro St. #834 • San Francisco, CA 94114
Tel +1 415/437-3800 • Fax +1 415/552-5104
david@CommunityMarketingInc.com

Community Marketing, Inc. is an NGLCC
Certified LGBT-Owned Business Enterprise.

