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# Reaching the LGBT Traveler USA Report

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

September 2016

Produced by



# 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.



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## Section 1

USA Report

Executive Summary  
& Key Findings



## Executive Summary & Key Findings • USA Report

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### 1. Gender Differences within the LGBT Community

In CMI's research experience, many destinations are not equally attractive to both gay men and lesbians. Many urban destinations perform better with gay men, while many outdoor destinations excel for lesbians. In addition, gay and bisexual men tend to travel more than lesbian and bisexual women overall.

This research indicates that both gay/bisexual men and lesbian/bisexual women who participated in the survey were equally likely to have traveled to Hawai'i in the past three years (at 18% for both genders). Future plans in the next two years are also equal; men 28% and women 27%.

We do see that individual island travel preferences differ by gender. Oahu performs better with gay and bisexual men (with a general attraction to more urban destinations), while Kauai performs better with lesbian and bisexual women (with a general attraction to more nature destinations).

**Important Differences by Gender and Generation:** By percentage, Baby Boomer lesbian and bisexual women are the top group that travels to and is interested in travel to Hawai'i, followed by Generation X men, followed by Baby Boomer men. Rates drop for Generation X women, most likely because of children (see LGBT parents section). Millennial travel rates among both gay men and lesbian women are near equal, and lag behind older generations.

Gender parity visitation is unusual for a destination. This parity is most likely a reflection of the variety of activities that the State of Hawai'i offers everyone; urban to outdoor, luxury to more modest accommodations. Hawai'i needs to carefully consider this parity in its outreach strategy and use of images.

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### 2. Hawai'i Visitation by Generation

Hawai'i's past three-year visitation rates by generation are relatively similar for Generation X (17%) and Baby Boomers (20%), and then fall off as may be expected for Millennials (11%).

**Millennials:** There are two reasons for a fall off for Millennial past travel to Hawai'i: First is the cost of a Hawai'i vacation is relatively expensive; second is that Millennial gay men are especially attracted to urban core vacations. For all Millennials, *future* travel interest to Hawai'i over the next two years is stronger at 23%.

**Generation X:** The Generation X numbers are strong. In the past year, 8% of Generation X survey participants traveled to Hawai'i, compared to 7% of Baby Boomers. Travel plans in the next two years are strongest for Generation X (32%). LGBT travel patterns for Generation X would be different than the general population because of the lack of children in most LGBT households, making LGBT Generation X a key market for Hawai'i. However, as discussed later in the report, LGBT parents are most concentrated with Generation X women, and having children heavily influences potential Hawai'i travel. Within Gen X, the strongest visitation rates are being generated by men; 10% of Gen X men visited in the past year compared to only 5% of Gen X women.

**Baby Boomers:** While LGBT Baby Boomer travel to Hawai'i is quite strong (7% in the past year; 20% in the past three years; 62% lifetime), the percentage for planned future travel begins to drop off (26%) compared to Generation X (32%). There are a few dynamics at play. LGBT Baby Boomers are known to be well-traveled, and Hawai'i may be a "common destination" for this group (see next recommendation). Also, some Baby Boomers may be aging out of long trips to places like Hawai'i because of health or economic concerns. In addition, we see stronger visitation rates by lesbian and bisexual women vs. gay and bisexual men among Baby Boomers.

**Beyond Generation:** Traditional generation divides are not always the best indicator of travel. When analyzing the data by age group, past three-year travel was strongest among age 45-64, which includes late Generation X and early to mid-Baby Boomers.

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### 3. Generation and Future Travel Planning to Hawai'i

CMI has been asking questions about future travel planning to LGBT community members for years, including to Florida destinations. Over time, we have been able to compare future plans vs. actual travel for Florida. CMI cautions that future travel is partially about real plans and partially about desire.

**Baby Boomers and Future Travel:** For destinations commonly traveled to by LGBTs over age 50, like Florida, many often don't "plan" to travel to the state, but in fact they return to these destinations previously enjoyed. In our Florida research, we see this dynamic every year, with actual travel percentages being consistent.

So while future numbers for Baby Boomers in this research seem weaker, CMI advises that these numbers may not be as low as indicated. When looking at a demographic group, CMI experience indicates that actual travel in the past year is the best indicator of near future travel for that group.

**Millennial and Future Travel:** For Millennials, future travel means something different, and is often an indication of interest in a destination. Future travel interest to Hawai'i by LGBT Millennials is reasonably strong, compared to actual travel. To encourage actual booking, low cost air is probably the most important driver. Millennials will find appropriately-priced accommodations once booking their flight.

Future travel planning rates express more aspiration and interest in traveling to a destination than a real prediction of future arrivals. Their meaning needs to be evaluated looking at the future rate compared to recent travel rates and further compared to generational attributes.

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### 4. Geographic Influences to Travel to Hawai'i

Just like other destinations, state of residence highly influences the likelihood of LGBTs traveling to destinations. LGBTs living in California are by far the most likely to visit Hawai'i (35% visited in the past 3 years / 52% plan to visit in the next 2 years), followed by residents of Washington and Oregon (30% visited in the past 3 years / 41% plan to visit in the next 2 years). LGBTs in the desert states also have excellent visitation rates (25% visited in the past 3 years / 43% plan to visit in the next 2 years). In contrast, those living in key Midwestern and Mid-Atlantic States had much lower Hawai'i visitation rates (11% visited in the past 3 years / 17% plan to visit in the next 2 years across the regions).

LGBTs living in the Western United States are the most likely prospective Hawai'i visitors for a number of reasons, most obviously price and length of the flight. However, there is another important reason. Florida has four key LGBT destination markets (Fort Lauderdale, Miami, Orlando and Key West). All have identified big cities of the Midwest and the East Coast as their key origin markets and heavily promote to the LGBT community. These destinations largely ignore Western gay men and lesbians. Entering the competition for Eastern and Midwest LGBT travelers may not be cost-effective. If desired, Hawai'i could choose a few key origin markets that have direct flights as an experiment to increase LGBT travel from non-Western states.



### 5. Household Income, Gender, Race and LGBT Travel Dynamics

The research indicates that beyond state of residence and parent status, the other biggest predictor of a Hawai'i visitor is household income. Over 60% of the 3-year LGBT Hawai'i visitors in this study had household incomes of over \$125,000/year. Gender income inequality is important to understand, since this is a predictor of visitation. Unlike opposite-sex couples, same-sex couples experience the amplified effect of income inequality. Male/male couples (who are also more likely to live in urban cores), tend to make more money than female/female couples. This is somewhat offset by the fact that lesbians are more likely to be in a relationship at any given time than gay men, and therefore have a dual income household. That said, if high household income is a major predictor of Hawai'i travel, it does favor older gay male couples, and especially discourages younger, single lesbians. Also, the United States experiences income inequality by ethnicity, favoring Caucasians and Asians. Amplifying this income inequality effect, Black and Latino gay men trend younger in age, and they are less likely to be in relationships than White gay men. These dynamics cause most of LGBT Hawai'i visitors to be White and Asian. There may also be cultural reasons that Hawai'i is more popular among White and Asian men, which were not explored in this research.

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### 6. LGBT Parents and Hawai'i

Past CMI research indicates that the percentage of LGBT community members who are parents is much lower than the general population. However, this may change; 50% of both male and female LGBT Millennials want to have children in the future. LGBT parents are most concentrated in Generation X with significant gender differences. Generation X gay men are still unlikely to have children (CMI overall research estimates at 6%). The lesbian and bisexual women Generation X parent percentage is much larger (CMI overall research estimates at 30%).

Within the LGBT community, being a parent of a child under age 18 reduces Hawai'i visitation. For example, less than 1% of LGBT parents visited Hawai'i in the past year, vs. 9% of the Dual Income No Kids ("DINK") participants. Within Generation X, only 2% of the LGBT lesbian parents visited Hawai'i in the past three years.

Positively, LGBT parents do see Hawai'i as a desirable destination. 22% of parents say that they plan to travel to Hawai'i in the next two years vs. 27% of DINKs. This percentage is likely unrealistic for actual travel, but it is an expression of interest in Hawai'i. We also know from past CMI research that LGBT parents focus their travel planning in two areas; theme resorts (like Disney) and beach destinations. There is potential for Hawai'i as an LGBT family destination for wealthier LGBT parents. The good news is that recent U.S. Treasury research indicates that LGBT parents do tend to be wealthier than straight parents, if for no other reason than they need to "plan" to have children in ways that straight parents do not, which often involves a higher income. In addition, the recent "LGBT Baby Boom" has resulted in very young children. Perhaps as these children age, Hawai'i will become a more attractive vacation destination for LGBT parents. The LGBT family market can be viable for Hawai'i eventually, but it is probably not a significant short-term growth market.



### 7. Grandparents

A surprisingly large number of LGBT Baby Boomers are parents of children over age 18, often from opposite-sex relationships before "coming out." CMI estimates that 20% of gay and bisexual male Baby Boomers and 33% of lesbian and bisexual female Baby Boomers have children over age 18. The dynamic of LGBT multi-generational travel has been mostly unexplored, and not the focus of this research. HTA should not discount in their LGBT Baby Boomer outreach that multi-generational family travel is a real possibility.



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### 8. Hawai'i's LGBT-Friendly Rating

Hawai'i is viewed as LGBT-friendly, with 70% giving the destination a positive rating (5 or 4 on a 5-point scale). Hawai'i's LGBT favorability is relatively consistent across demographics. Hawai'i's rating is comparable to Las Vegas and Sydney, but 15% lower than South Florida and Southern California.

Perhaps more of a concern, 26% of LGBT participants rated Hawai'i as "5-Extremely LGBT-friendly" and 44% rating Hawai'i a "4" on the 5-point scale. In comparison, Las Vegas had a 32%/37% divide and South Florida has a 55%/31% divide.

The three-year recent visitors indicated an 83% positive rating, with a 36% rating of "5" and 47% rating of "4." Typically LGBTs who visit and enjoy a destination will rate a destination better. These LGBT-friendly ratings are good, but not great. Clearly, there is work to do to improve the destination's LGBT-friendly image and reputation.



### 9. Role of Safety in LGBT Travel

Obviously, everyone wants to be safe when traveling. Destinations must understand that safety takes on an even greater emphasis for the LGBT community. Gay men, lesbians, and especially transgender community members are more likely than the general population to experience physical, verbal and political harassment both at home and while on vacation. For LGBT travelers, there is a valid concern about safety. No wonder then, that on a list of 13 destination attributes, safety ranked first among LGBTs, with 87% thinking it was important. That said, the research points to Hawai'i not having any LGBT-specific safety concerns at this time. CMI suggests that should a negative event like a "gay bashing" happen in Hawai'i, a positive tourism response is essential. Allowing lingering concerns about LGBT safety can damage a destination's reputation. Orlando is a recent example of how a positive local response to a very negative event reassured the LGBT community that Orlando remained a safe travel destination.

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### 10. Romance

Romance as a marketing message is tricky in the LGBT community, as gender differences come into play.

CMI's overall LGBT research shows that gay and bisexual men are more likely to define themselves as single (55%) vs. lesbian and bisexual women (40%). This study's income requirements bias participation to dual income couples, not singles. But even in this research, 35% of the men were single vs. 17% of the women. It's not surprising then, that connecting with a partner was more of a primary motivator for women (67%) than men (46%). Positively, for high-income, DINK participants, 73% identified connection with a spouse or partner as a primary motivation to vacation. However, at the same time, only 41% of the DINK participants indicated that romance was a reason to choose a destination. CMI has seen this pattern before: Connection to a partner scoring better than "romance," especially for gay male couples.

**Connection to a Partner:** Ultimately, connection to a partner is a powerful message for Hawai'i's most likely visitors. However, CMI suggests not making messages or images overly "romance novel-style," as LGBTs may not relate. Older couples may relate more to intellectual and emotional connection between partners. Acknowledging this connection within an older couple, along with a suggestion of romance and joint exploration of new experiences may be more powerful. An additional positive outcome to couple messages and images is the reinforcement that Hawai'i is LGBT-friendly.

However, there is a negative to a "couple"—focused message. Romance messages may reinforce that Hawai'i is a destination just for couples, and may turn off single gay men. This seems to be a risk worth considering.

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### 11. Destination Weddings and Honeymoons

Since the United States Supreme Court ruling, the first wave of same-sex couples getting married is now complete. Within this research group, 35% of the men and 58% of the women were already married. Further, 73% of LGBT parents were married. Much attention is placed on same-sex marriage, which is seen as a “new market” to many. In reality, marriage has been available to American same-sex couples, in waves, for 12 years (starting in Massachusetts).

At one time, when same-sex couples could only be married in certain states, destination weddings were popular, and sometimes necessary. Now most same-sex couples can choose a location close to home (like everyone else). Hawai‘i should view the LGBT wedding and honeymoon business less as a “new business wave” and more as a stable long-term business strategy. Same-sex couples will continue to get married, a small percentage will choose a destination wedding, and most same-sex couples will choose a honeymoon. We would expect that business to be about 5% (corresponding to the estimated U.S. LGBT population size) of Hawai‘i’s wedding and honeymoon business from this point forward.

Positively, other research shows that Hawai‘i is a primary destination for LGBT honeymoons. The CMI 2015 LGBT Travel Survey rate was 8% of same-sex couples choosing Hawai‘i for their honeymoon, the highest percentage of any destination.

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### 12. Activities Desired in Any Vacation Destination

LGBT travelers were asked about preferred travel activities in any vacation destination. There were gender and generational differences, similar to findings in other CMI research. Below are some important observations.

- Millennial gay/bisexual men seek nightlife, which is why young gay men are typically attracted to urban destinations. Oahu may be a better option for this group.
- Older LGBTs are more attracted to historical sites and cultural attractions (but these activities still score well among younger travelers).
- LGBT neighborhoods, bars and infrastructure are far more important to gay men than to lesbians. However, LGBT programming is not necessary for most LGBT community members in choosing a resort destination.
- Outdoor activities are far more important to lesbians, than to gay men. However, many gay men do enjoy outdoor activities.
- While water sports activities were a second-tier attraction, other CMI research shows that LGBTs are strongly attracted to warm weather and beach destinations. So the preferred imagery may be a beach scene or cocktail sunset by the ocean vs. being on a sailboat.
- High-end shopping did not score well as a destination motivator. This confirms other CMI research which has shown that shopping is not a driver within the LGBT community to select a destination. Gay men do have excellent brand name and luxury shopping consumer patterns, but that may be more of a “home” experience than a “vacation” motivation.
- Golf never performs well as a motivation among LGBT travelers. This is consistent across many CMI research reports and always performs very last on similar questions. Golf may also be a “cultural” turnoff, because in many resort settings the sport may attract more conservative participants, who may be perceived as LGBT-unfriendly.

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### 13. Reasons to Visit Any Destination: New Experiences and Relaxation

In analyzing the reasons why LGBTs visit any destination, the two concepts that were most important were a desire to have new experiences (75%) and rest and relaxation (70%). In a later question, LGBTs felt that Hawai'i was a perfect match for those two key vacation motivations. These could be considered as primary marketing messages, interpreted for the LGBT community.

The results confirmed some key demographic differences on the second tier of vacation motivations. Lesbian and bisexual women were far more likely than gay and bisexual men to want to experience outdoors and nature (67% women vs. 46% men). In addition, food and cuisine were far more popular among Millennials (52%) than among older generations (37%). This strong connection between culinary experience and LGBT Millennials is corroborated by other CMI research.



### 14. LGBT Profile of Any Vacation and a Hawai'i Vacation

LGBT travelers were asked about their most recent vacation, to obtain information about a typical vacation 500 or more miles from home. This trip is typically 6 nights with a travel party of two, and most likely traveling with a partner or spouse. The vast majority will book their vacation direct with the airline and hotel, and will stay at a more "traditional" hotel. These patterns are the same for a Hawai'i vacation (except that a Hawai'i vacation is likely to be 7 nights).



### 15. Reasons for Lapsed Hawai'i Visitors and Non-Visitors

The reasons that LGBTs do not visit Hawai'i are purely practical (financial, flight time, available vacation time, etc.). There appears to be no negative LGBT-specific reasons, nor safety concerns as reasons for not visiting.

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### 16. Hawai'i as a Great LGBT Vacation Destination

The survey asked participants if they felt that Hawai'i is a great LGBT vacation destination. Below are the 5-point scale results, with 5 being strongly agree, and 1 being strongly disagree.

	5	4	3	2+1
All LGBTs	15%	30%	43%	12%
3-Year Past Visitors	31%	34%	28%	7%

These results are not great for a vacation destination as renowned as Hawai'i. CMI believes that the results reflect a disconnect between Hawai'i and the term "a great LGBT vacation destination." If the question were asked if Hawai'i was simply, "a great vacation destination," results would likely have been higher.

The results to this question and other questions in the report seem to point to the LGBT community not thinking of Hawai'i as an "LGBT destination." This can have both positive and negative implications for tourism. Many LGBTs live in gay urban centers like San Francisco and Seattle. These community members are not necessarily looking for another "gay hotspot" for vacation. They are looking for an attractive destination that is LGBT-friendly.

Few participants rated this question negatively, further indicating that the destination is considered LGBT-friendly.

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### 17. LGBT-Specific Programming in Hawai'i

The history of LGBT-specific programming and activities in Hawai'i is unusual. Compared to many destinations, Hawai'i probably had more LGBT-specific activities in the past (bars, guesthouses, dedicated beaches, etc.). Hawai'i continues to lose LGBT-specific infrastructure, the most recent being the Maui Sunseeker.

The survey asked participants if they were likely to visit Hawai'i for various LGBT-specific events, and the reaction was lukewarm. For example, only 9% said that they were very likely to travel for a Hawai'i Pride event, and 14% of lesbians were very likely for a women's event. While visiting the islands, LGBTs wanted LGBT nightlife options, but other activities like LGBT-dedicated water activities had a more neutral response. Further, CMI believes that the LGBT-specific programming percentages indicated in this report are probably overinflated, as some LGBTs want to be supportive of LGBT-specific options.

How should Hawai'i interpret these results? Hawai'i is an "LGBT-friendly" destination, not an "LGBT destination." And that is fine, and desirable to most in the community. Many gay men want to know that gay nightlife options exist, and Oahu's gay bar options should be highlighted. The development of LGBT-dedicated catamaran or snorkel trips would probably not drive increased visitation to Hawai'i, but these activities would be appreciated by many LGBT visitors if available and convenient.

Events are a somewhat different story, as CMI has learned from other studies that LGBT events do drive tourism. For some cities, like San Francisco, multiple LGBT events draw hundreds of thousands of LGBT visitors annually. Most likely the top event prospect as an LGBT tourism driver to Honolulu is Pride. Unfortunately, the event has an inconsistent record and has never developed strong traction as a tourism event. With assistance from government and corporate entities, Honolulu should find ways to help support Pride and promote the event as more of a tourist offering. In addition, LGBT events are a driver for younger LGBTs, and LGBTs on the fence about visiting a destination. Pride or other events could serve as a "catalyst" and attract first time visitors.

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### 18. Planning, Booking and In-Destination Motivators

The research identified the vacation planning, booking, and in-destination motivators for the LGBT community. For LGBT Hawai'i visitors, inspiration comes from friends and relatives, mainstream travel websites, and adventure/travel magazines. Social media also scored respectably for travel inspiration. Hawai'i visitors reported that mainstream and LGBT media sources are equally important, and HTA should not assume that the LGBT media is the only place to influence LGBT travelers.

During the booking stage, the vast majority of LGBTs report self-booking through airline and hotel websites.

While in the destination, attention turns to the use of smart phone apps and guidebooks.

**Destination Websites:** While not a key source for any one category, destination websites scored respectably in all three stages; travel inspiration, planning/booking, and in-destination use. CMI research findings included with this report demonstrate that developing an LGBT tourism microsite can be an important way to develop reputation within the LGBT community. LGBT microsites are also a good place to direct potential visitors viewing LGBT targeted outreach campaigns.

### 19. A Welcome

As indicated earlier, Hawai'i's LGBT visitation and LGBT reputation could improve. The LGBT community does not receive many LGBT-targeted outreach messages directly from Hawai'ian companies, although some LGBT-specific advertising has been produced by hotel groups and airlines. The community does receive messages about the beauty of Hawai'i, water activities, beaches and relaxation, but those messages are typically received in a heteronormative style through imagery and messaging. To increase LGBT tourism, HTA could specifically welcome LGBT travelers through a dedicated campaign. An LGBT Welcome Campaign could also be developed as a Hawai'i-wide co-op including leading hotels, airlines and attractions, to increase exposure for all.



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### 20. Same-sex Imagery in Mainstream Advertising

One way Hawai'i can encourage social media attention is to “create buzz.” It is a method used by many corporations to drive increased impressions of an otherwise small-budget campaign. Hawai'i might consider including same-sex couples, along with opposite-sex couples in a commercial or campaign to the general population. This approach often produces excellent results not only from the LGBT community, but also from Millennials. Since LGBTs have strong readership in magazines like Travel & Leisure and Conte Nast Traveler, this may be a good place for the development of a display ad either featuring a same-sex couple, or creative that includes opposite-sex and same-sex couples.

This type of advertising sometimes receives a small flurry of complaints. Many corporations expect, hope for and embrace these complaints because it is way of to generate PR and demonstrate their core commitment to diversity and inclusion.



### 21. Marketing Planning and a Regional Approach

In an ideal world, with unlimited budget, Hawai'i would develop a national LGBT outreach campaign. That rarely happens within LGBT tourism. Instead, most campaigns are regional.

The research points to a campaign in West Coast cities having direct flights to Hawai'i. West Coast urban LGBT print news publications are a good place for Hawai'i to advertise, since Generation X and Baby Boomer gay men read them. CMI research confirms that high-income gay men do read these publications, and more so than Millennials.

There are many LGBT websites with strong followings, and most of the major LGBT website groups can geo-target impressions to the West Coast.

Social media engagement in the LGBT community is very strong across all generations. Facebook promotions have been effective approaches for destinations looking to market LGBT community members with specific activity interests.

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## 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 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.

This report covers USA residents only. LGBTs living in other countries are reported in separate documents. Participants were recruited from 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 USD 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 reach 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  $\pm 3.14\%$  at a 95% level of confidence.

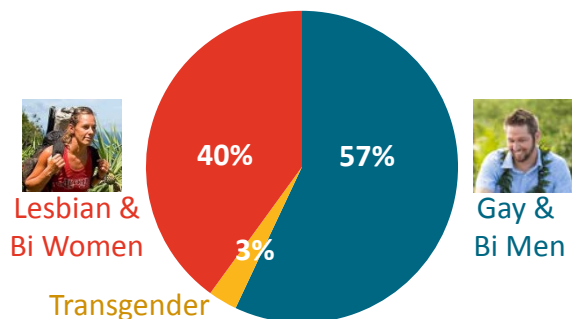
### ABOUT THE CMI LGBT RESEARCH PANEL

- › 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.

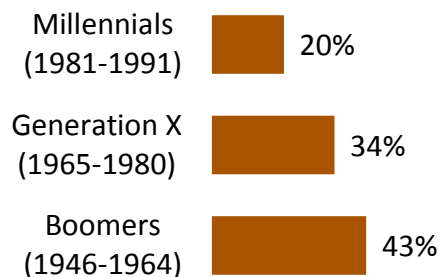
## LGBT Research Respondent Profile (N=1,121)

The research methodology strived to find 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 community. With 87% of the LGBT research participants having a household income over \$80,000 and 68% over \$100,000, the research participant group trends older and more likely to be coupled.

### Identity



### Generation



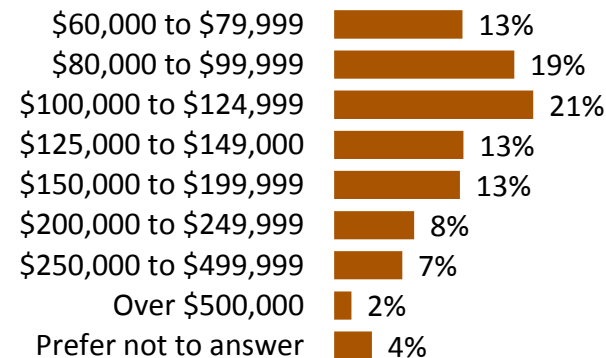
### Ethnicity

White / Caucasian/European	76%
Hispanic / Latino	8%
Asian	7%
African American/Black	7%
Mixed Race	3%
Other	2%

### Relationship

	Gay & Bi Men	Lesbian & Bi Women
Married	35%	58%
Single	28%	11%
Living with partner / No legal status	22%	15%
Dating / Not living with partner	7%	6%
Civil union or domestic partner	3%	3%
Engaged to be married	3%	4%
Other	3%	3%

### Income



## LGBT Research Respondent Profile (N=1,121)

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. Participation was achieved in all 49 states; all but Hawai'i, by design.

### Top States

California	17%
New York	7%
Texas	7%
Illinois	7%
Florida	6%
Georgia	6%
Washington	4%
Pennsylvania	4%
Arizona	3%
Massachusetts	3%
Oregon	2%

### Children



Gay & Bi Men

5% vs. 17%

Have children under 18 living at home



Lesbian & Bi Women



Gay & Bi Men

4% vs. 10%



Have grandchildren



Lesbian & Bi Women

### Education

Post Graduate Degree	46%
College Graduate	38%
High School	15%

### Employment

Employed, FT/PT	70%
Retired	16%
Self-Employed	11%
Other	2%



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?

	All LGBT	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Boomers
1-2	21%	16%	28%	23%	22%	20%
3-4	30%	28%	33%	30%	32%	29%
5+	48%	55%	39%	47%	46%	52%

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## Section 3


### Competing Destinations



**LGBT Visitation by Demographic:** Among the research participants, 19% reported having visited Hawai'i in the past three years. Given Hawai'i's size, population and flight time from the USA mainland, the visitor percentage is quite good compared to many destinations (even if other destination percentages are higher). For LGBT travelers, state of residence, gender and generation all play major roles in destination selection. More information about how this applies to Hawai'i will be discussed later in the report.



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

	All LGBT	Pacific / Mountain States	Midwest / Eastern States	Gay & Bisexual Men	Lesbian & Bisexual Women	Millennials	Gen X	Boomers
Florida	53%	35%	61%	55%	49%	50%	54%	53%
San Francisco	38%	54%	30%	42%	32%	43%	37%	37%
Las Vegas	35%	50%	28%	40%	28%	39%	41%	30%
Western Europe	35%	36%	34%	41%	27%	29%	29%	40%
Los Angeles	32%	49%	24%	36%	26%	37%	32%	30%
Caribbean	28%	16%	34%	32%	23%	25%	29%	28%
Mexico	26%	30%	24%	29%	22%	30%	27%	23%
San Diego	23%	43%	13%	26%	19%	26%	25%	21%
Arizona	23%	31%	18%	23%	22%	24%	23%	21%
 Hawai'i	19%	35%	12%	21%	18%	13%	18%	22%
Australia	6%	7%	5%	7%	4%	4%	4%	7%
Costa Rica	6%	5%	6%	7%	4%	4%	6%	6%
Cuba	2%	2%	3%	3%	2%	1%	2%	3%
None of the above	6%	4%	6%	4%	8%	4%	6%	6%

**Warm Weather Destinations, Competitive Comparisons:** Analyzing just warm weather resort destinations, we see strong support for Florida. However, this comes mostly from Eastern and Midwest USA residents. This is not a surprise since Miami, Fort Lauderdale, Orlando, Tampa and Key West all heavily promote their destinations to LGBTs living in these regions. For those LGBTs living in the Western USA, Hawai'i has a high visitation rate. There is competition from other California cities, but that most likely represents quick trips to neighboring cities, which are common for gay Californians. For longer vacations, Mexico is the major competitor, as well as Florida, for Western LGBT travelers.



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


	All LGBT	Pacific / Mountain States	Midwest / Eastern States	Gay & Bisexual Men	Lesbian & Bisexual Women	Millennials	Gen X	Boomers
Florida	53%	35%	61%	55%	49%	50%	54%	53%
Los Angeles	32%	49%	24%	36%	26%	37%	32%	30%
Caribbean	28%	16%	34%	32%	23%	25%	29%	28%
Mexico	26%	30%	24%	29%	22%	30%	27%	23%
San Diego	23%	43%	13%	26%	19%	26%	25%	21%
Arizona	23%	31%	18%	23%	22%	24%	23%	21%
Hawai'i	19%	35%	12%	21%	18%	13%	18%	22%
None of the above	6%	4%	6%	4%	8%	4%	6%	6%



**Future LGBT Visitation by Demographic:** 27% of participants expressed an interest in visiting Hawai'i in the next two years. Caution should always be given to “future” travel questions as they are often more about hopes and dreams and discovering new destinations. That said, the significant increase for Hawai'i shows that it is a desirable destination for the LGBT community.



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

	All LGBT	Pacific / Mountain States	Midwest / Eastern States	Gay & Bisexual Men	Lesbian & Bisexual Women	Millennials	Gen X	Boomers
Western Europe	44%	42%	44%	52%	31%	43%	40%	46%
Florida	42%	28%	48%	44%	40%	43%	44%	41%
San Francisco	38%	50%	33%	43%	31%	43%	38%	38%
Caribbean	30%	21%	35%	33%	28%	32%	35%	27%
Las Vegas	29%	38%	25%	33%	24%	34%	31%	26%
Los Angeles	28%	38%	24%	31%	23%	37%	28%	25%
 Hawai'i	<b>27%</b>	<b>45%</b>	<b>19%</b>	<b>28%</b>	<b>27%</b>	<b>23%</b>	<b>32%</b>	<b>26%</b>
Mexico	25%	33%	21%	27%	22%	26%	30%	21%
San Diego	21%	36%	13%	21%	19%	23%	22%	19%
Arizona	16%	22%	13%	14%	18%	14%	14%	18%
Cuba	15%	18%	14%	18%	12%	13%	12%	18%
Costa Rica	11%	13%	10%	12%	11%	13%	12%	10%
Australia	10%	12%	9%	13%	7%	7%	9%	13%
None of the above	5%	3%	5%	4%	6%	4%	4%	5%

**Future LGBT Visitation to Hawai'i:** When evaluating future travel to Hawai'i, we have a strong but expected trend for Hawai'i to be far more attractive to those living in the Western part of the United States. Of interest, lesbian and bisexual women are equally likely as gay and bisexual men to express interest in Hawai'i. Compared to other CMI research, this is a strong showing for the women's market, which often underperforms the men's travel market. There are generational differences. Generation X shows the greatest interest in a future Hawai'i vacation. Millennial future visit interest is lower, and this is of some concern. While Millennial actual travel is expected to be less, their Hawai'i future travel interest is lower than expected, compared to other destinations. This may be an indication that Hawai'i is not connecting with younger LGBTs. While Baby Boomer interest also falls, this is more likely an indicator that Hawai'i is a familiar destination to Baby Boomers. Future interest may be more comparable to other familiar destinations like California or Florida, where Baby Boomers repeat visit, even when they don't necessarily *plan* to visit in the future.



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

Hawai'i	All LGBT 27%	Pacific / Mountain States	Midwest / Eastern States	
		45%	19%	
Hawai'i	All LGBT 27%	Gay & Bisexual Men	Lesbian & Bisexual Women	
		28%	27%	
Hawai'i	All LGBT 27%	Millennials	Gen X	Boomers
		23%	32%	26%



**Past vs. Future Travel:** For select destinations and demographics, we looked at past and future travel trends. For destinations like Los Angeles and Las Vegas, large percentages have already visited, but fewer hope to travel to the destination in the next two years. This is not a predictor of future travel but more an indication that “familiar” destinations often score lower in “future interest.” CMI notices this trend in other research, and LGBTs returning to familiar destinations that are easy to get to is quite likely. Positively, Hawai‘i has peak future interest in the comparison charts, especially for residents of California, Oregon and Washington states.



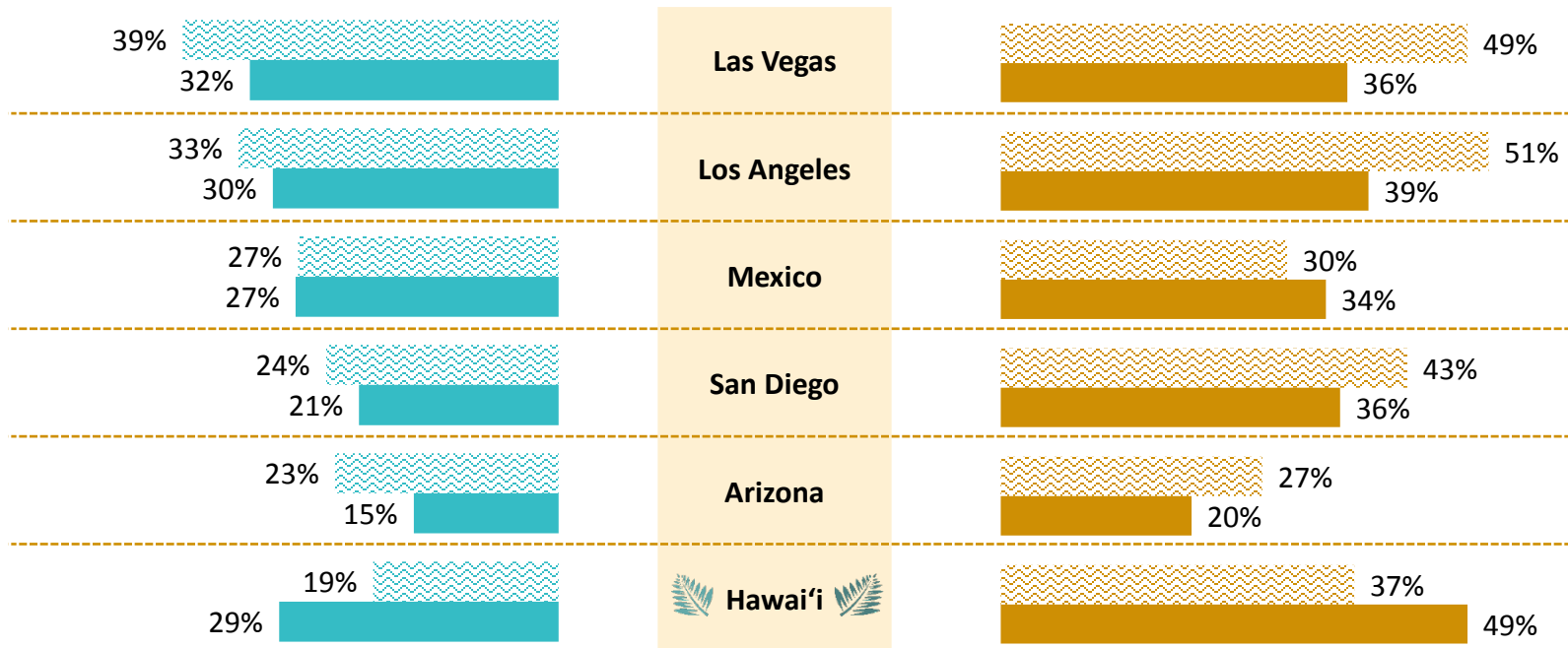
**Which of the following destinations, if any, have you visited in the past three years?  
Of the same destinations, which of the following do you plan to visit in the next two years?**

**Among Participants Age 30-59**

**Among Participants from CA, OR & WA**

 Visited in the past 3 years  Hope to visit in the next 2 years

 Visited in the past 3 years  Hope to visit in the next 2 years



**Hawai'i Visitors in Past Three Years, Return Travel Plans:** For recent Hawai'i visitors (past three years), 56% want to return to Hawai'i in the next 2 years. Of note is the high interest for *international* warm weather destinations among recent Hawai'i visitors. LGBTs who visit Hawai'i (see Visitor Profile) have high incomes. This demonstrates that among LGBTs visiting Hawai'i, the entire world is the competition, not just destinations in the USA mainland.



Which of the following destinations, if any, have you visited in the past three years?  
Of the same destinations, which of the following do you plan to visit in the next two years?

**Among Hawai'i Visitors in the Past Three Years**

Destination	Visited in the past 3 Years	Hope to visit in the next 2 years
 Hawai'i 	100%	56%
Florida	59%	42%
San Francisco	57%	44%
Las Vegas	55%	42%
Western Europe	44%	49%
Los Angeles	43%	33%
San Diego	38%	31%
Mexico	37%	37%
Caribbean	33%	35%
Arizona	31%	20%
Australia	12%	17%
Costa Rica	8%	15%
Cuba	5%	17%
None of the above	1%	2%



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**Section 4**  
**LGBT-Friendly**  
**Rating**

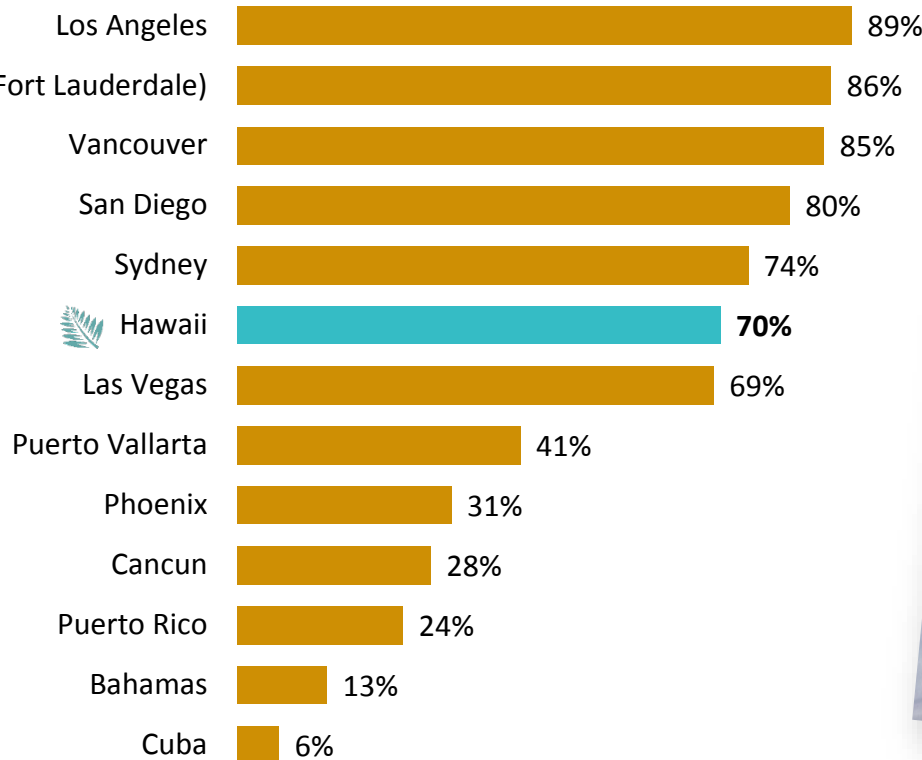


**LGBT-Friendly Rating:** While Hawai'i does not rate as high as the known LGBT-friendly urban centers in California and Florida, it has a respectable LGBT-friendly rating, and much higher than competing warm weather islands and international warm weather destinations.



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)**



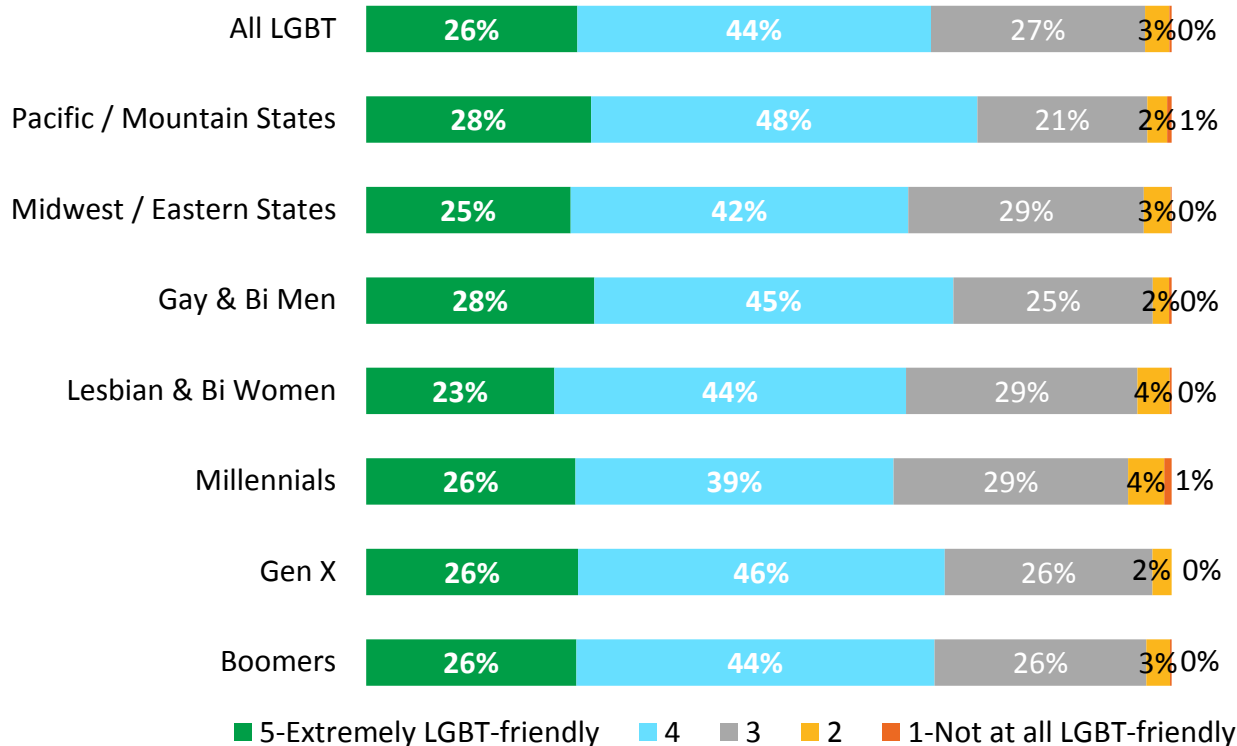
**LGBT-Friendly Rating by Demographic:** Evaluating Hawai'i's LGBT-friendly rating by demographic, very few see Hawai'i as LGBT-unfriendly. However, more were likely to rate Hawai'i as a 4 than a 5, with a significant number rating it a more average 3. There is virtually no demographic difference in the ranking.



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

Hawai'i Ratings

Extremely LGBT Friendly → Not at all LGBT-friendly



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**Section 5**  
**LGBT Travel**  
**Motivations**





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



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

	All LGBT	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Boomers	3-Year Visitors
<b>I can explore and do new things</b>	<b>75%</b>	74%	77%	81%	76%	72%	<b>74%</b>
<b>To experience other cultures</b>	<b>74%</b>	76%	73%	74%	75%	73%	<b>73%</b>
<b>It's a great chance to rest and relax</b>	<b>70%</b>	71%	70%	73%	77%	66%	<b>71%</b>
To learn new things	<b>55%</b>	57%	52%	52%	51%	59%	<b>54%</b>
To connect with my spouse or partner	<b>55%</b>	46%	67%	63%	61%	47%	<b>56%</b>
To see for myself the authentic things I have read or heard about	<b>54%</b>	55%	52%	54%	49%	56%	<b>55%</b>
To be outdoors and experience nature	<b>50%</b>	44%	59%	57%	54%	46%	<b>54%</b>
I feel alive and energetic when I travel	<b>49%</b>	50%	49%	55%	52%	46%	<b>51%</b>
To seek adventure	<b>49%</b>	50%	47%	60%	50%	43%	<b>54%</b>
To gain knowledge of history	<b>48%</b>	49%	45%	42%	42%	54%	<b>53%</b>
To celebrate or mark a special occasion	<b>46%</b>	44%	50%	51%	53%	40%	<b>51%</b>
To do activities I can only do on vacation	<b>41%</b>	42%	40%	55%	43%	35%	<b>39%</b>
To indulge my passion for food and fine cuisine	<b>41%</b>	45%	36%	52%	39%	36%	<b>41%</b>
To spend more quality time with my family	<b>34%</b>	27%	43%	44%	40%	27%	<b>36%</b>
To spend more time with my friends	<b>32%</b>	33%	31%	45%	33%	26%	<b>39%</b>
I can splurge on myself when I travel	<b>27%</b>	30%	23%	35%	28%	23%	<b>26%</b>
To engage in my hobbies	<b>16%</b>	16%	13%	23%	15%	13%	<b>18%</b>
I can be more extravagant when I travel	<b>13%</b>	17%	9%	14%	13%	13%	<b>14%</b>
To be the first among my friends to do something	<b>8%</b>	11%	4%	15%	8%	5%	<b>12%</b>
Other reason	<b>4%</b>	4%	3%	3%	2%	5%	<b>3%</b>

## LGBT Motivations to Take Vacations

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



**Connect with my spouse or partner**

**67% Women  
46% Men**



**Outdoors and experience nature**

**59% Women  
44% Men**



**Spend more quality time with my family**  
**43% Women  
27% Men**



**Spend more time with my friends**

**45% Millennial  
33% Gen X  
26% Boomer**

**Indulge my passion for food and fine cuisine**

**52% Millennial  
39% Gen X  
36% Boomer**



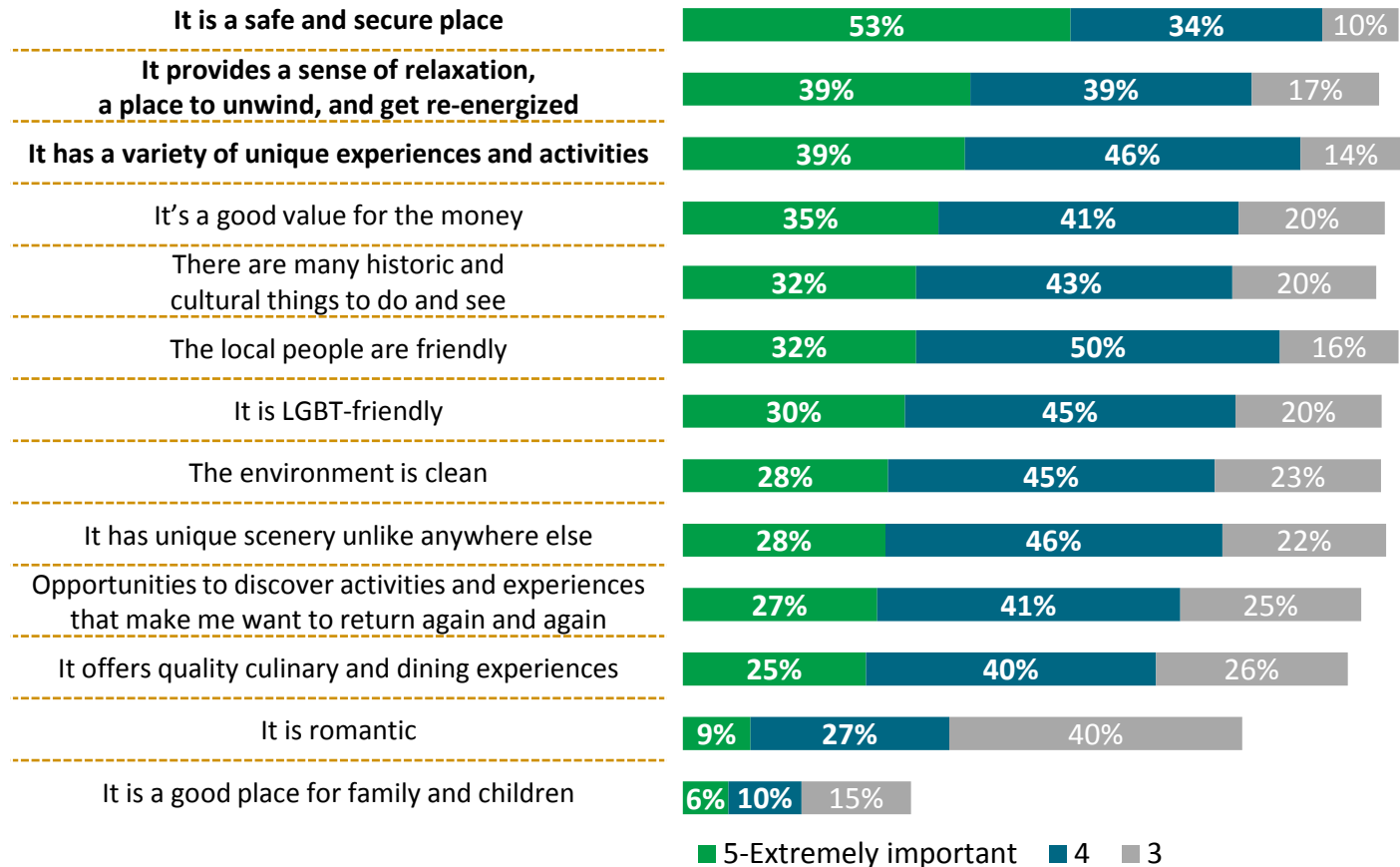
**Seek adventure**

**60% Millennial  
50% Gen X  
43% Boomer**

**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 in the level of importance. Safety is the top attribute needed. Safety is an important element for most LGBT travelers, and LGBT-friendly is an important part of evaluating the safety of the destination. Romance and children were the only attributes that scored low among the 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?



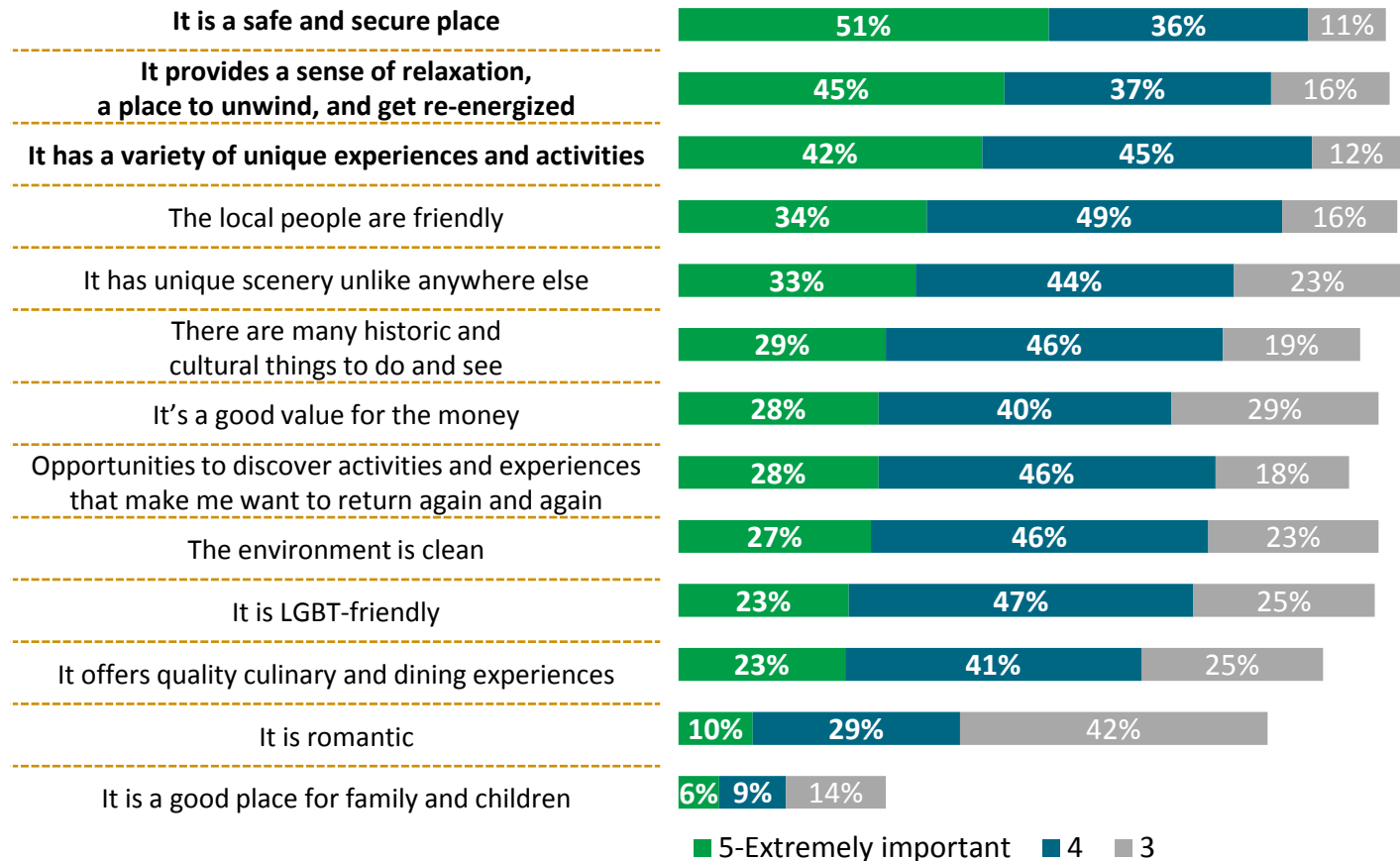
**Travel Attributes for Hawai'i Visitors:** Compared to the all LGBT group, most attribute ratings to any destination were similar for recent Hawai'i visitors. The biggest differences were that relaxation was 6% more important for Hawai'i visitors. Some attribute ratings to any destination decreased for the recent Hawai'i visitors, such as value for the money (-7%) and LGBT-friendly (-8%).



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 3 years



**Travel Attributes by Demographic:** Overall, the demographic differences for this question were minor. However, there are some important differences by demographic: Gay men care more about LGBT-friendly destinations. Baby Boomers care more about friendly locals and historical and cultural attractions.



**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?**

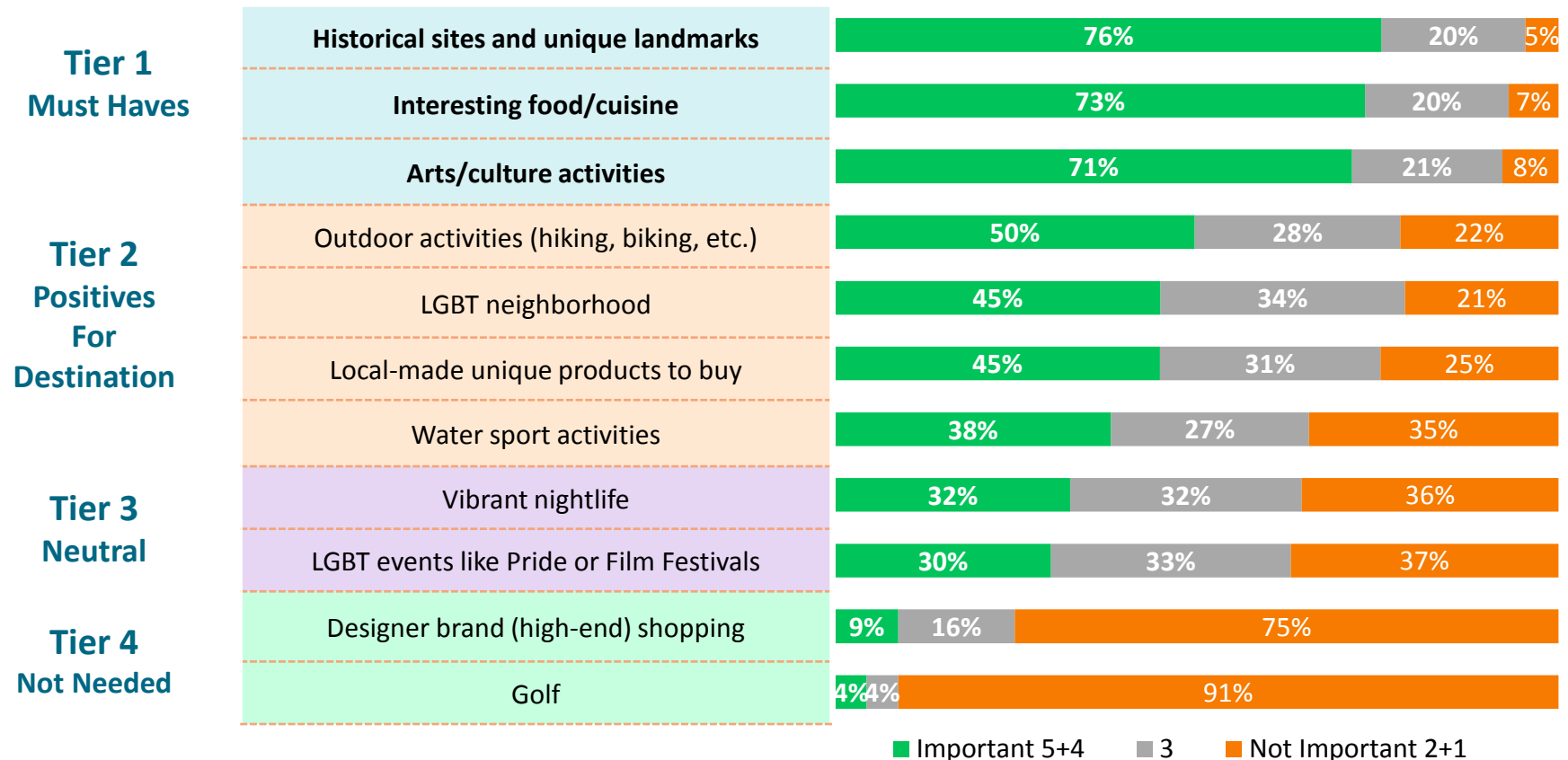
<b>Notable Gender Difference</b>		5-Extremely Important	4
<b>It is LGBT-friendly</b>	Among Gay & Bi Men	33%	46%
	Among Lesbian & Bi Women	25%	45%

<b>Notable Generational Differences</b>			
<b>The environment is clean</b>	Among Millennials	23%	39%
	Among Gen X	27%	47%
	Among Boomers	32%	46%
<b>There are many historic and cultural things to do and see</b>	Among Millennials	25%	43%
	Among Gen X	29%	41%
	Among Boomers	36%	46%
<b>The local people are friendly</b>	Among Millennials	24%	48%
	Among Gen X	30%	50%
	Among Boomers	37%	51%

**Travel Activities:** When traveling more than 500 miles to any destination, there are some distinctions in preferred activities. The top three interests across survey respondents were history, food and culture. Of note is that golf and shopping scored especially low. LGBT-specific activities were more in the middle for importance.



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?



**Travel Activities by Demographic:** There are important demographic differences for top activity preferences. This type of nuance is important when Hawai'i is target marketing by gender and/or generation 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	Men			Women		
	Millennial	Gen X	Boomer	Millennial	Gen X	Boomer
Interesting food/cuisine	<b>78%</b>	73%	<b>78%</b>	<b>73%</b>	65%	<b>70%</b>
Historical sites and unique landmarks	72%	73%	<b>82%</b>	72%	68%	<b>78%</b>
Arts/culture activities (museums, art galleries, festivals, etc.)	68%	68%	<b>78%</b>	<b>72%</b>	63%	<b>71%</b>
Vibrant nightlife	<b>58%</b>	50%	31%	31%	16%	17%
LGBT neighborhood	<b>56%</b>	<b>55%</b>	<b>53%</b>	39%	29%	31%
Outdoor activities (hiking, biking, etc.)	53%	47%	42%	55%	<b>61%</b>	52%
Local-made unique products to buy	43%	41%	43%	43%	46%	<b>54%</b>
Water sport activities (snorkeling, swimming, surfing, etc.)	41%	36%	31%	36%	48%	46%

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**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 they took a vacation 500 or more miles away from their home and write down that destination. The survey then asked some specific questions about that trip. Since the survey was administered in August 2016, the most recent trip was more summer oriented. Timing could somewhat influence results, if the survey had been administered at a different time of the year. Among survey participants, 4% wrote a Hawai'i destination.

### The typical LGBT trip profile:

- 60% had a travel party of two, and 24% traveled alone. Only 16% had travel parties of more than two.
- The average trip was 6 nights.
- 16% used some type of pre-paid, inclusive tour package. That package typically included accommodations (94%) and meals (83%), with some packages also including attractions (53%), guided tours (47%) and airfare (37%).
- 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), 75% stayed at a hotel.
- Total average per person spend was approximately \$1,900 including air and hotel.
- Those using pre-paid packages spent far more than those booking individually (most likely because of the nature of the trip).
- For those not using a pre-paid package, air and hotel were the top expenses (as expected). After that, dining was the highest spend item, higher than entertainment or shopping.
- Males tended to spend more than females; Baby Boomers spent more than Millennials.

## Profile of Participant’s 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.

Any Destination in Europe	13%
Any Destination in Florida	11%
Any Destination in California	10%
Any Destination in Mexico	7%
Any Destination in Caribbean	6%
New York City	4%
Las Vegas	4%

**4%**

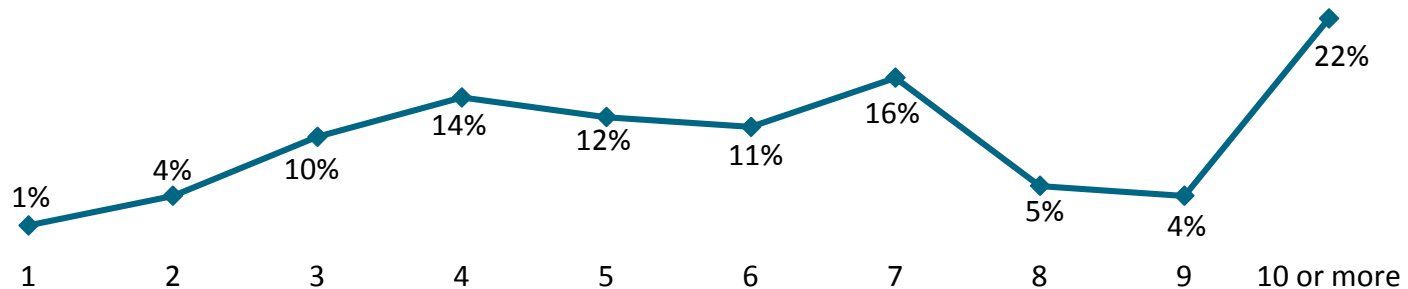
(41) visited any island in Hawai'i



The 8 broad destinations above reflect **58%** of all written destinations.

*Note that month of survey (August 2016) does somewhat influence these results for the “last” vacation.*

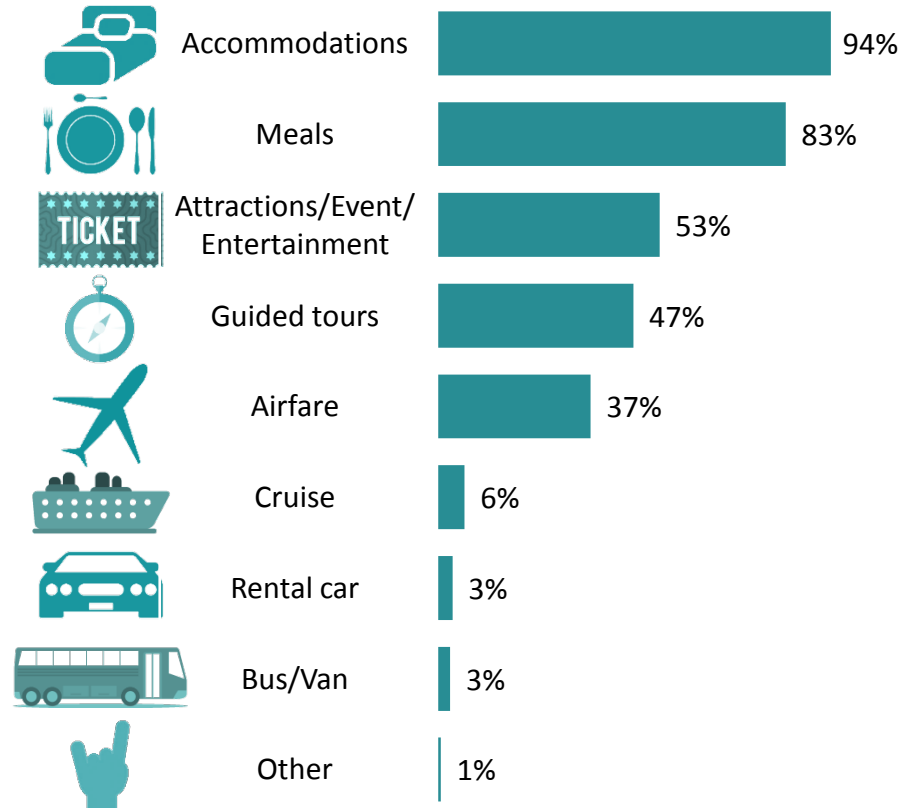
How many nights did you spend during the above trip?



## Profile of Participant's 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 Participant's Last Vacation to Any Destination



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

	All LGBT	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Boomers
Hotel	61%	64%	57%	58%	61%	62%
Friends or relatives	21%	17%	25%	26%	22%	18%
Cruise ship	10%	10%	11%	4%	7%	15%
Rental house	9%	9%	9%	10%	10%	8%
Bed & breakfast	5%	4%	7%	3%	4%	7%
Condominium	5%	6%	4%	4%	6%	5%
Timeshare unit	4%	3%	5%	5%	4%	4%
Private room in private home	2%	2%	2%	4%	1%	2%
Airbnb, HomeAway, VRBO	2%	1%	3%	2%	1%	2%
Campsite, beach	2%	1%	2%	4%	1%	1%
Hostel	1%	1%	1%	3%	1%	0%
Shared room/space in private home	0%	0%	0%	0%	0%	1%
Other	2%	2%	2%	1%	1%	3%

## Profile of Participant's Last Vacation to Any Destination



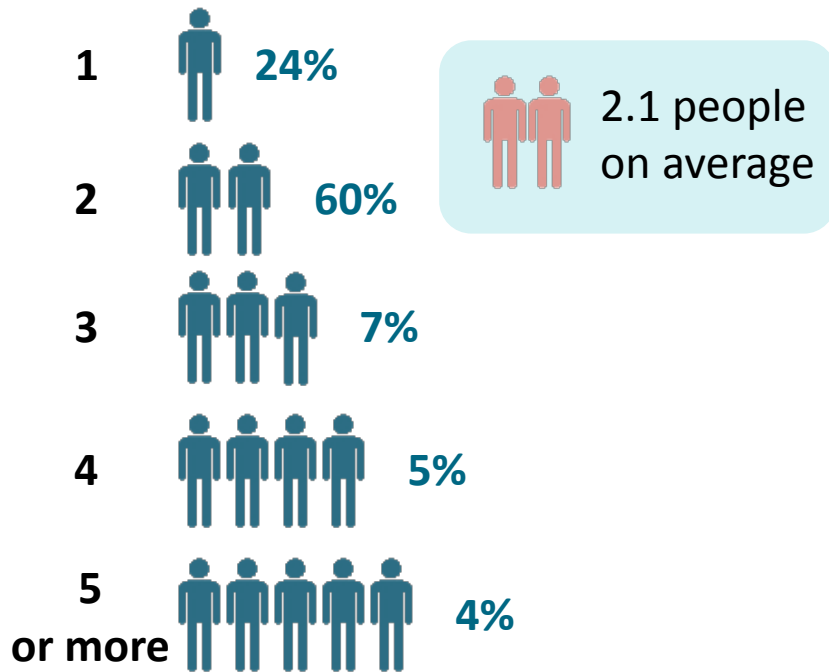
During the trip to your last vacation 500 or more miles away, where did you stay?

**Focused: Among those who didn't stay at a cruise ship, with friends or relatives, or select "other"**

	All LGBT	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Boomers
Hotel	75%	77%	73%	71%	75%	76%
Rental house	11%	11%	12%	13%	12%	10%
Bed & breakfast	6%	5%	8%	4%	5%	9%
Condominium	6%	7%	6%	5%	7%	6%
Timeshare unit	5%	4%	7%	6%	6%	5%
Private room in private home	2%	2%	2%	5%	1%	2%
Airbnb, HomeAway, VRBO	2%	1%	3%	2%	2%	3%
Campsite, beach	2%	1%	3%	4%	1%	2%
Hostel	1%	1%	1%	4%	1%	0%
Shared room/space in private home	0%	0%	1%	0%	0%	1%

## Profile of Participant's Last Vacation to Any Destination

### # of People on Trip



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

All LGBT	\$ 1,897
Men	\$ 2,038
Women	\$ 1,707
Millennials	\$ 1,421
Gen X	\$ 1,621
Boomers	\$ 2,224



## Profile of Participant's Last Vacation to Any Destination

Among those who have pre-paid packages (per person)

	Pre-paid Package	**Excluding the pre-paid amount**						Total	Grand Total
		Dining, Food, Beverage	Entertainment & Recreation	Transportation	Shopping	Lodging	Others		
All LGBT	\$ 1,880	\$ 157	\$ 128	\$ 367	\$ 136	\$ 111	\$ 81	\$ 980	\$ 2,860
Men	\$ 1,834	\$ 159	\$ 122	\$ 365	\$ 132	\$ 104	\$ 103	\$ 984	\$ 2,818
Women	\$ 1,885	\$ 156	\$ 124	\$ 380	\$ 122	\$ 113	\$ 62	\$ 956	\$ 2,841
Millennials	\$ 1,254	\$ 151	\$ 89	\$ 228	\$ 119	\$ 80	\$ 39	\$ 704	\$ 1,959
Gen X	\$ 1,396	\$ 143	\$ 157	\$ 221	\$ 155	\$ 44	\$ 47	\$ 768	\$ 2,164
Boomers	\$ 2,181	\$ 134	\$ 106	\$ 363	\$ 98	\$ 108	\$ 87	\$ 896	\$ 3,077

Among those who do not have pre-paid packages (per person)

	Dining, Food, Beverage	Entertainment & Recreation	Transportation	Shopping	Lodging	Others	Total	Grand Total
All LGBT	\$ 305	\$ 182	\$ 532	\$ 122	\$ 470	\$ 124	\$ 1,735	\$ 1,735
Men	\$ 335	\$ 189	\$ 567	\$ 137	\$ 555	\$ 144	\$ 1,926	\$ 1,926
Women	\$ 263	\$ 168	\$ 488	\$ 97	\$ 356	\$ 101	\$ 1,473	\$ 1,473
Millennials	\$ 254	\$ 172	\$ 412	\$ 113	\$ 329	\$ 91	\$ 1,370	\$ 1,370
Gen X	\$ 274	\$ 155	\$ 507	\$ 114	\$ 402	\$ 92	\$ 1,544	\$ 1,544
Boomers	\$ 354	\$ 207	\$ 607	\$ 134	\$ 585	\$ 163	\$ 2,049	\$ 2,049

Among All LGBT (Per Person)

All LGBT	\$ 1,897	Millennials	\$ 1,421
Men	\$ 2,038	Gen X	\$ 1,621
Women	\$ 1,707	Boomers	\$ 2,224

## Profile of USA Participants' Last Vacation to Any Destination

	Package people n=151	Non-package people n=861
Avg. No. of people on trip	1.9	2.1
Avg. No. of nights on trip	7.4	6.2

### Average Spending Per Person Per Day Among All LGBT in US Dollars

Dining, Food, Beverage	\$ 56.00
Entertainment & Recreation	\$ 34.93
Shopping	\$ 21.90
Lodging	\$ 82.85
Others	\$ 21.40



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**Section 7**  
**LGBT Hawai'i**  
**Travel**



**Lifetime Visits to Hawai'i:** Half of the LGBT survey respondents had visited Hawai'i at some point in their life. Gay men were somewhat more likely than lesbians to indicate at least one visit in their life, but the difference was not significant. The greatest demographic predictor of a past visit was age. 74% of Millennials reported never visiting Hawai'i, and this certainly represents an opportunity for growth. LGBT Baby Boomers have significant past experience with Hawai'i, with 62% reporting at least one visit, and 30% reporting 3 or more visits.



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

	All LGBT	Pacific / Mountain States	Midwest / Eastern States	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Boomers
<b>Never visited Hawai'i before as an adult</b>	50%	29%	60%	48%	54%	74%	55%	38%
<b>1-2</b>	29%	31%	28%	31%	26%	20%	31%	32%
<b>3-5</b>	11%	19%	7%	11%	11%	5%	7%	15%
<b>6 or more</b>	10%	21%	4%	10%	9%	2%	7%	15%

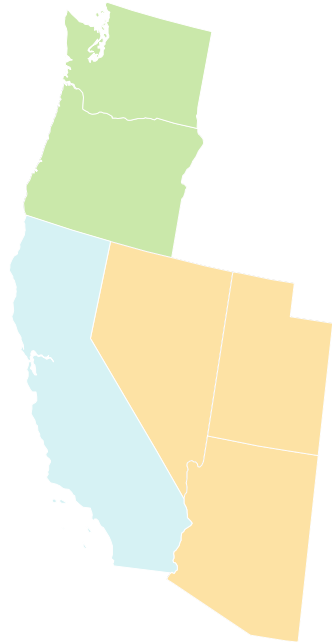


**Most Recent Visits to Hawai‘i:** Of the LGBT research participants, 7% indicated a visit to Hawai‘i in the past year (this figure is consistent with CMI’s Annual LGBT Travel Survey in December 2015). 17% visited in the past three years. Visitation over the past five years does not differ substantially by gender. Generation X visitation rates are strong over the past three years.

Visited in Past Year	All LGBT	Pacific / Mountain States	Midwest / Eastern States	Gay & Bisexual Men	Lesbian & Bisexual Women	Millennials	Gen X	Boomers
<b>Of All Participants</b>	<b>7%</b>	<b>12%</b>	<b>4%</b>	<b>7%</b>	<b>6%</b>	<b>3%</b>	<b>8%</b>	<b>7%</b>
Visited in Past Three Years	All LGBT	Pacific / Mountain States	Midwest / Eastern States	Gay & Bisexual Men	Lesbian & Bisexual Women	Millennials	Gen X	Boomers
<b>Of All Participants</b>	<b>18%</b>	<b>30%</b>	<b>11%</b>	<b>18%</b>	<b>18%</b>	<b>11%</b>	<b>17%</b>	<b>20%</b>
Visited in Past Five Years	All LGBT	Pacific / Mountain States	Midwest / Eastern States	Gay & Bisexual Men	Lesbian & Bisexual Women	Millennials	Gen X	Boomers
<b>Of All Participants</b>	<b>26%</b>	<b>44%</b>	<b>17%</b>	<b>27%</b>	<b>25%</b>	<b>17%</b>	<b>24%</b>	<b>30%</b>
Ever Visited Hawai‘i	All LGBT	Pacific / Mountain States	Midwest / Eastern States	Gay & Bisexual Men	Lesbian & Bisexual Women	Millennials	Gen X	Boomers
<b>Of All Participants</b>	<b>50%</b>	<b>71%</b>	<b>40%</b>	<b>52%</b>	<b>46%</b>	<b>26%</b>	<b>45%</b>	<b>62%</b>

Note that the Hawai‘i 3-year visitation percentage of 18% is one percent different than reported in the destination comparison question earlier. This is understandable as the questions were asked in different ways. The report uses this question for 3 year and 5 year profiles.

**Regional Distribution of Hawai'i Visitors:** Clearly, California is Hawai'i's top LGBT feeder market, both for past travel and planned future travel. Other Pacific Northwest and Desert West states also have excellent visitor numbers. Visitation then drops-off for other large LGBT population centers in the Midwest and East. This drop-off is expected given distance, but may be exasperated by the significant LGBT travel promotions by Florida's LGBT tourism centers to residents of the Northeast and Midwest.



	Total # Survey Participants	Visited Hawai'i in the past 3 years	Hope to visit Hawai'i in the next 2 years
CA	196	35%	52%
WA+OR	74	30%	41%
AZ+NV+UT	51	25%	43%
FL+GA	132	13%	23%
TX+OK+LA	92	13%	21%
IL+IN+MI+WI+MN+OH	186	11%	18%
NY+PA+NJ+DC+MD+DE+CT+VA	231	10%	16%

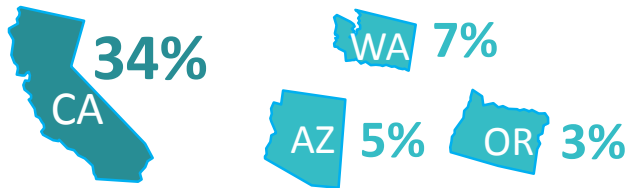
**Gender and Generational Divides:** When analyzing by gender and generation, important nuance is revealed. For Generation X, gay and bisexual men are far more likely to be Hawai'i visitors than Generation X lesbian and bisexual women. This is most likely due to the much higher concentration of Generation X female parents (lesbians are 5 times more likely to be parents than men in this generation). For Baby Boomers, lesbian and bisexual women are more likely to be 5-year visitors over gay and bisexual men, however the one year visitation rate is about the same.

	Total	One Year Visitation	Five Year Visitation	Two Year Future
<b>Millennial Men</b>	120	3%	18%	27%
<b>Gen X Men</b>	217	10%	29%	32%
<b>Baby Boomer Men</b>	278	7%	27%	26%
<b>Millennial Women</b>	97	3%	16%	19%
<b>Gen X Women</b>	155	5%	17%	31%
<b>Baby Boomer Women</b>	184	8%	35%	27%

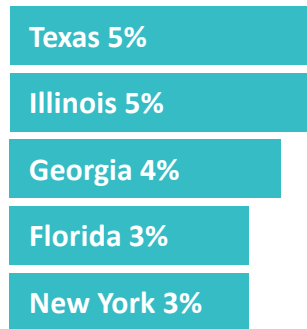
## Hawai'i 5-Year Visitors Profile

### Residence

West Coast is Hawai'i's Top LGBT Feeder Market



Other USA states with major LGBT populations also provide visitors, but are underrepresented compared to their LGBT populations



### Children

6% of LGBT Hawai'i visitors have children under age 18 living at home



### Age

While Hawai'i visitors are of all ages, there is some tendency to underrepresent under age 40

Target age for highest number of LGBT travelers is: **Age 45-64**

### Relationship

**71%** Partnered **23%** Single

Of those Hawai'i visitors who are coupled, **64% are already married**

### Income

The typical LGBT visitor to Hawai'i has a household income over **\$100K**



### Gender

The gender split of LGBT visitors was approximately **60% men and 40% women**



Men

**60% vs 40%**



Women

However, while gay men are more likely to visit Hawai'i than lesbians, that is partially due to income levels. Overall, there is little gender difference among wealthier LGBT community members in their likelihood to visit Hawai'i if they make **over \$80,000**.

### Ethnicity

Strong tendency for visitors to be **White or Asian/Pacific Islander**

**74%** White

**13%** Asian/Pacific Islander

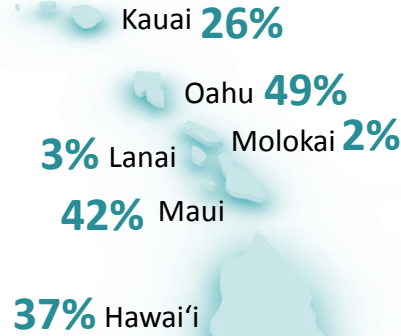
## Hawai'i 5-Year Visitors Profile

### LGBTs Visit All Islands

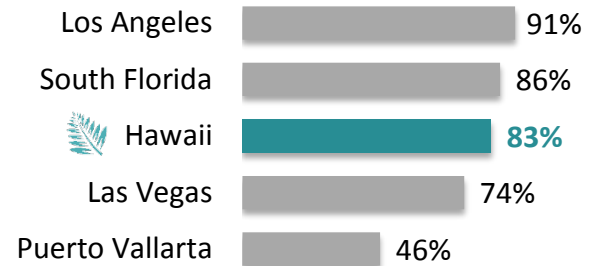
55%

have visited Hawai'i **3 or more times**

Median number of nights on last visit is **7**



**83%** of visitors consider Hawai'i to be **LGBT-friendly**. Comparatively, that is lower than Los Angeles, similar to South Florida and higher than Las Vegas and Puerto Vallarta (46%)



### Top three positive statements LGBT visitors make about Hawai'i

- Hawai'i provides a sense of relaxation, a place to unwind, and get re-energize, **94% agree**
- Hawai'i has a variety of unique experiences and activities, **92% Agree**
- Hawai'i has unique scenery unlike anywhere else, **90% agree**


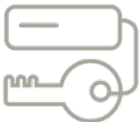

### What Hawai'i Visitors Want from Any Vacation:

Safety	87%
Unique experiences	87%
Friendly locals	81%
Relaxation	80%
Historical/cultural attraction	75%
LGBT-friendly	73%
Local festivals	72%
Interesting cuisine	71%

**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. There was more variance by generation. Baby Boomers were more motivated by LGBT-specific reasons to book than Millennials. Millennials were also far more open to the shared economy accommodation experience.



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

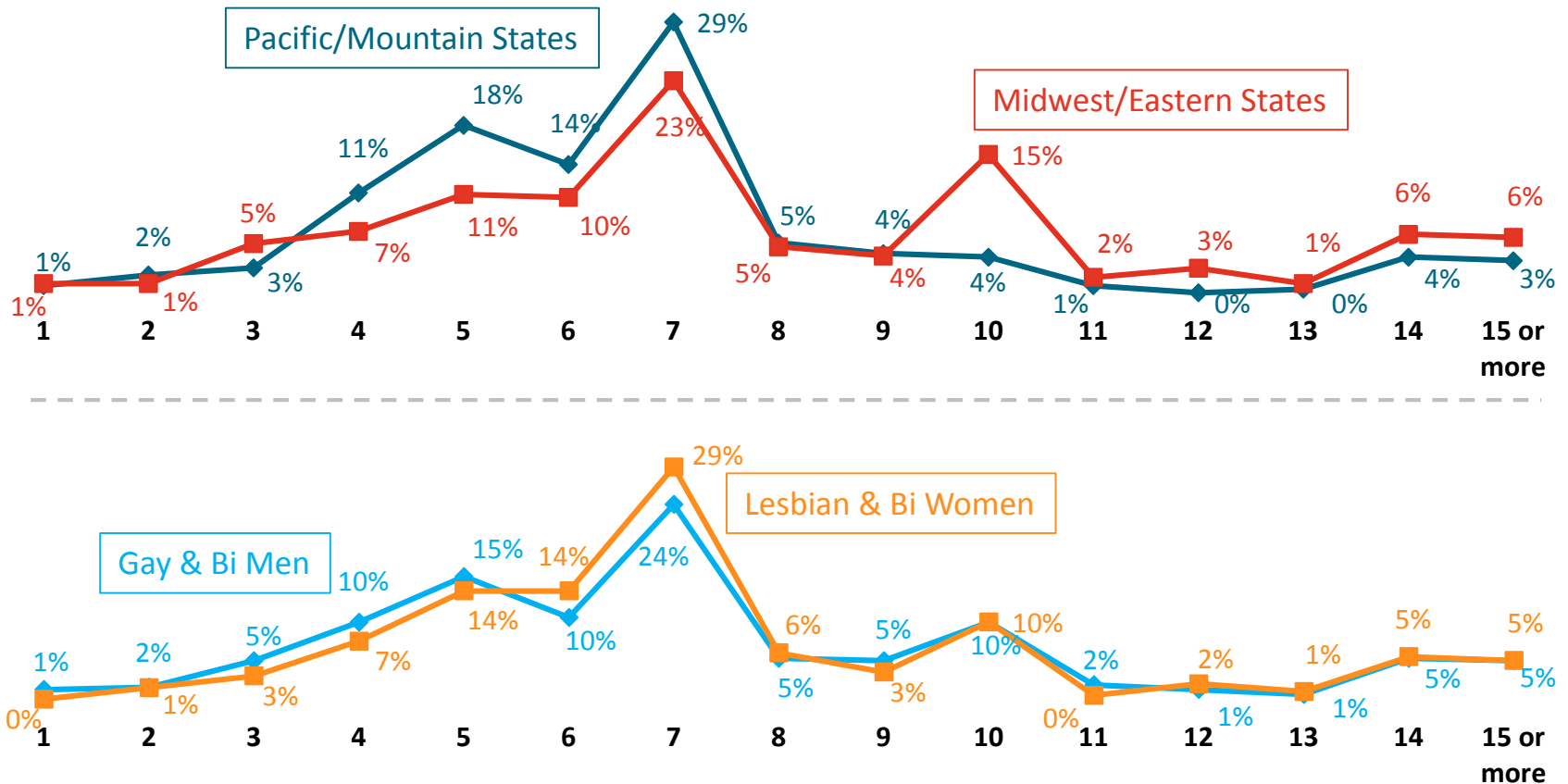
	Very Likely			Somewhat Likely			Not Likely		
	Millennials	Gen X	Boomers	Millennials	Gen X	Boomers	Millennials	Gen X	Boomers
   <p>An accommodation based on price and/or location, independent of LGBT-specific reasons</p>	69%	67%	59%	25%	29%	34%	7%	4%	6%
At a hotel or resort operated by a brand known to be LGBT-friendly	49%	54%	55%	45%	43%	40%	6%	2%	4%
A small B&B or guesthouse promoted as LGBT-owned or LGBT-friendly	47%	36%	42%	40%	46%	41%	13%	18%	17%
AirBnB or shared room stay promoted as LGBT-owned or LGBT-friendly	44%	26%	22%	35%	38%	32%	22%	36%	46%
At a condo or rental house promoted as LGBT-owned or LGBT-friendly	41%	39%	38%	45%	47%	44%	14%	14%	18%
An LGBT-dedicated hotel, resort or guesthouse	29%	31%	39%	55%	55%	49%	16%	14%	12%



**Hotel Night Distribution:** The median number of nights for LGBT visitors is seven. This is true for visitors by gender and by generation. There is some tendency for visitors from the Midwest and Eastern States to be more likely to spend nine or more nights on the islands (however the median for this group remains seven).



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



**Preferred Island:** LGBTs visit all Hawaiian islands. LGBTs from the Eastern USA are more likely to visit multiple islands than participants from the Western USA. Gay men are more likely than lesbians to visit Oahu, most likely because gay men have a stronger preference for urban vacations. Baby Boomers have a higher tendency than Generation X participants to visit Oahu and Maui, while Big Island and Kauai visitation is similar between the two generations.



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

	Pacific / Mountain States	Midwest / Eastern States	Gay & Bi Men	Lesbian & Bi Women	Gen X	Boomers
Oahu	47%	57%	56%	45%	44%	57%
Maui	37%	45%	42%	40%	35%	44%
Hawai'i or The Big Island	32%	54%	44%	41%	43%	44%
Kauai	25%	28%	26%	29%	25%	28%
Molokai	4%	2%	4%	2%	2%	3%
Lanai	3%	3%	4%	2%	2%	3%

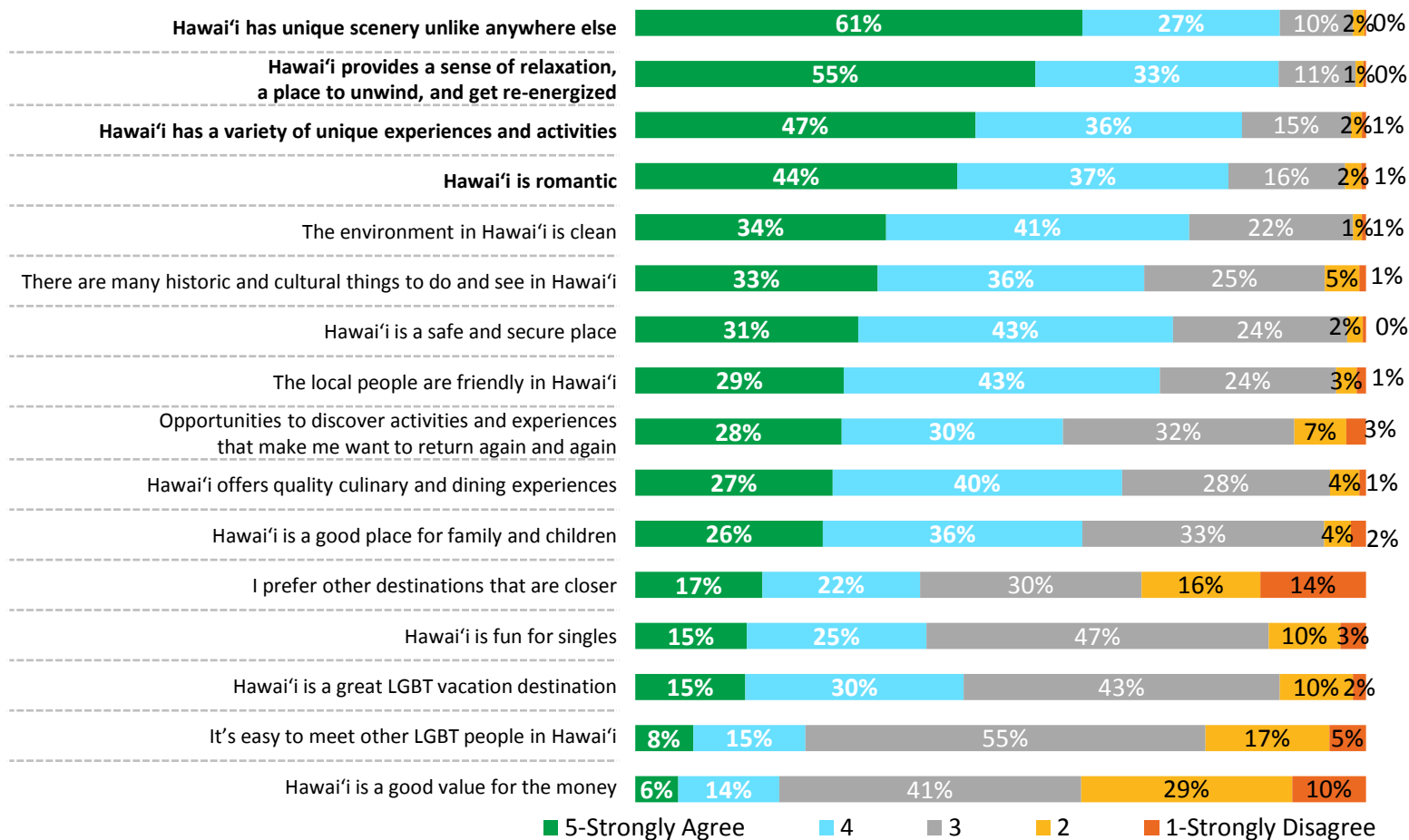


Millennials were not evaluated due to a low base.

**Hawai'i Attributes:** LGBTs are most likely to agree that Hawai'i has unique scenery unlike anywhere else, provides a sense of relaxation, a place to unwind and 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. When asked if Hawai'i is a "great LGBT vacation destination," the response was more neutral than other questions.



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



## Hawai'i Attributes by Gender: Gender differences were minor.



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 has unique scenery unlike anywhere else	87%	10%	2%	90%	9%	1%
Hawai'i provides a sense of relaxation, a place to unwind, and get re-energized	87%	11%	2%	90%	8%	1%
Hawai'i has a variety of unique experiences and activities	80%	17%	3%	87%	12%	1%
Hawai'i is romantic	78%	18%	4%	86%	13%	1%
The environment in Hawai'i is clean	78%	20%	2%	74%	25%	1%
Hawai'i is a safe and secure place	77%	21%	3%	70%	28%	2%
The local people are friendly in Hawai'i	73%	21%	5%	71%	27%	2%
There are many historic and cultural things to do and see in Hawai'i	68%	26%	6%	72%	23%	5%
Hawai'i offers quality culinary and dining experiences	65%	30%	5%	69%	26%	5%
Hawai'i is a good place for family and children	61%	33%	6%	62%	33%	5%
Opportunities to discover activities and experiences that make me want to return again and again	56%	32%	12%	62%	30%	7%
Hawai'i is a great LGBT vacation destination	46%	41%	13%	43%	47%	9%
I prefer other destinations that are closer	44%	29%	27%	31%	32%	37%
Hawai'i is fun for singles	41%	45%	14%	38%	50%	13%
It's easy to meet other LGBT people in Hawai'i	27%	54%	19%	19%	56%	25%
Hawai'i is a good value for the money	21%	40%	39%	18%	42%	40%

**Hawai'i Attributes by Generation:** Generation differences were minor. Those differences that do exist are mostly explained by the life stage of the participant.



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.

	Millennials			Gen X			Boomers		
	Agree 5+4	Neutral 3	Disagree 2+1	Agree 5+4	Neutral 3	Disagree 2+1	Agree 5+4	Neutral 3	Disagree 2+1
Hawai'i has unique scenery unlike anywhere else	92%	7%	1%	88%	10%	2%	87%	11%	2%
Hawai'i provides a sense of relaxation, a place to unwind, and get re-energized	90%	9%	1%	89%	9%	1%	87%	11%	2%
Hawai'i is romantic	87%	12%	1%	82%	16%	2%	78%	18%	4%
Hawai'i has a variety of unique experiences and activities	85%	13%	2%	84%	13%	3%	82%	16%	1%
Hawai'i is a safe and secure place	74%	23%	3%	73%	25%	2%	74%	23%	3%
The environment in Hawai'i is clean	74%	24%	3%	76%	22%	2%	77%	22%	1%
There are many historic and cultural things to do and see in Hawai'i	71%	25%	4%	71%	24%	6%	70%	24%	6%
Hawai'i offers quality culinary and dining experiences	70%	27%	4%	68%	27%	5%	65%	30%	5%
The local people are friendly in Hawai'i	69%	26%	5%	75%	21%	4%	70%	26%	4%
Hawai'i is a good place for family and children	66%	31%	3%	62%	34%	4%	59%	33%	8%
Opportunities to discover activities and experiences that make me want to return again and again	64%	31%	5%	63%	27%	9%	54%	34%	11%
Hawai'i is fun for singles	48%	40%	12%	42%	47%	11%	35%	51%	14%
Hawai'i is a great LGBT vacation destination	43%	43%	14%	46%	44%	11%	46%	43%	12%
I prefer other destinations that are closer	37%	32%	31%	38%	31%	31%	41%	28%	30%
It's easy to meet other LGBT people in Hawai'i	25%	50%	25%	19%	57%	24%	25%	56%	18%
Hawai'i is a good value for the money	22%	36%	41%	16%	40%	44%	20%	46%	34%

HAWAII TOURISM

AUTHORITY

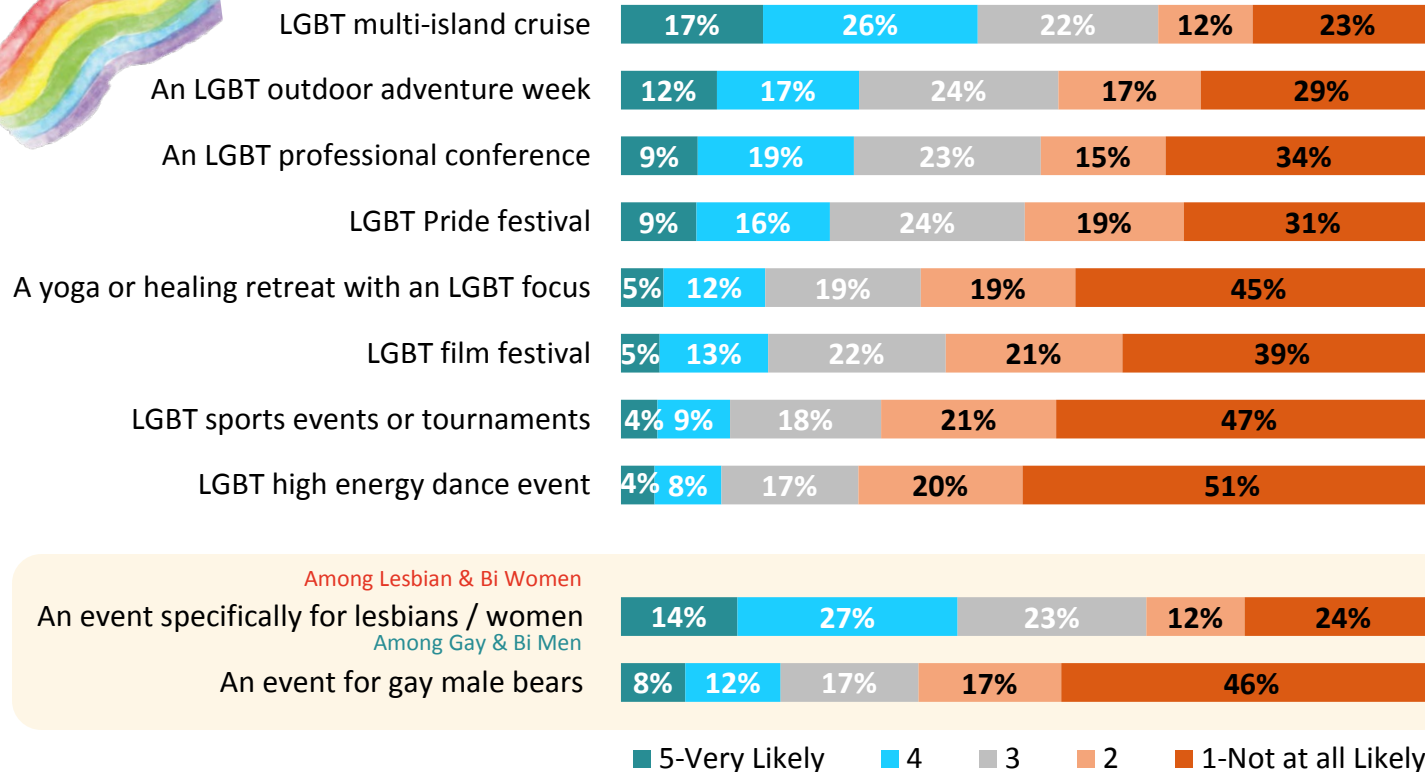
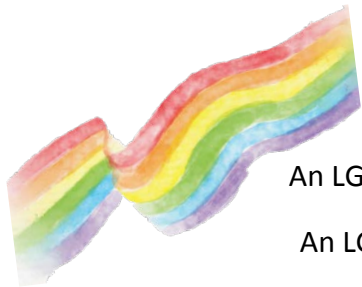
**Section 8**  
**LGBT-Specific**  
**Programming and**  
**Events**



**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 better than 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, visitation by targeted demographics may be increased by specific LGBT programming. Millennial men have the most interest in Pride events in Hawai'i, and Millennials are more interested in LGBT events in general. 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?**

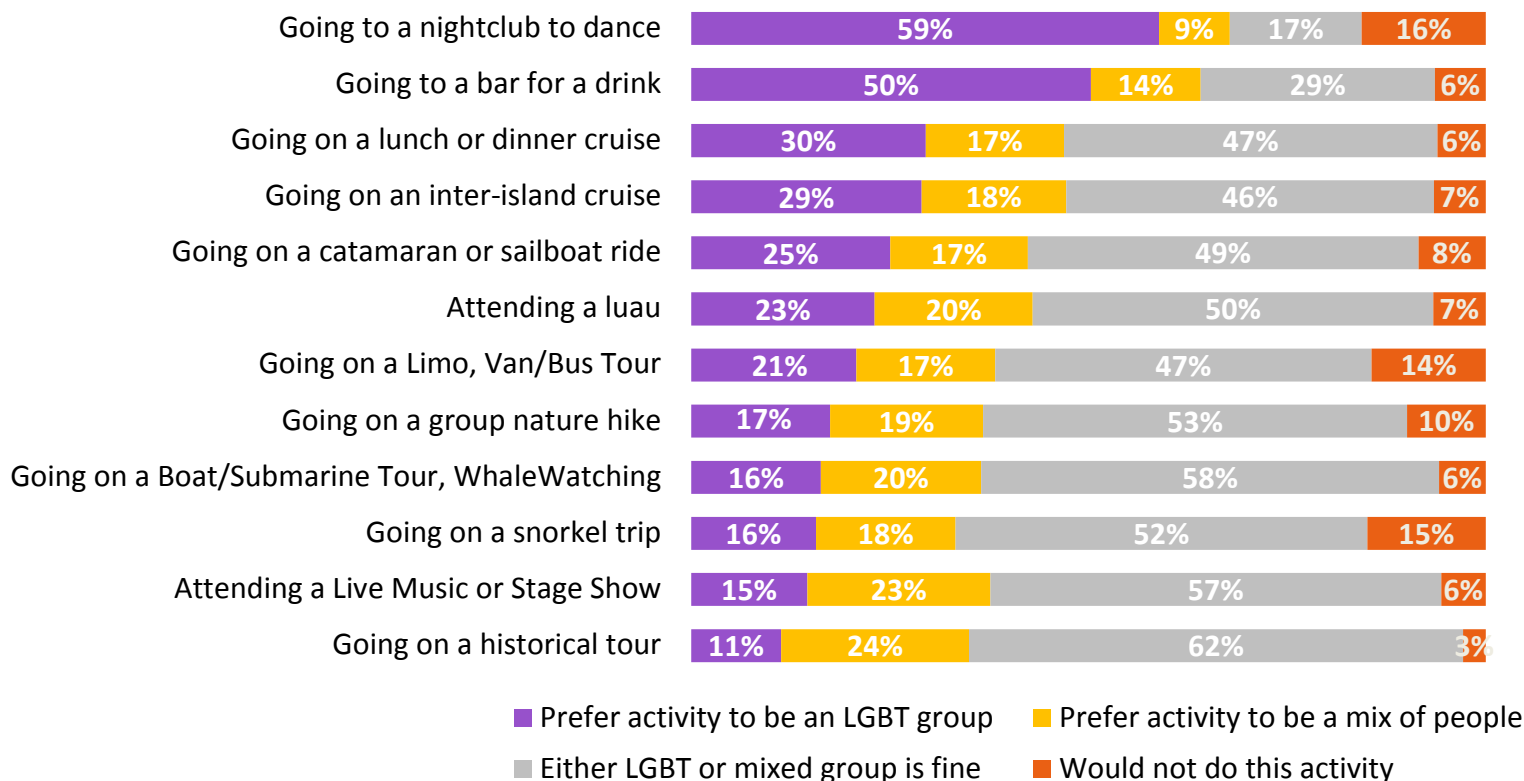
Rated as 5-Very Likely or 4	Among Gay & Bi Men			Among Lesbian & Bi Women		
	Millennials	Gen X	Boomers	Millennials	Gen X	Boomers
LGBT multi-island cruise	48%	50%	46%	47%	34%	36%
An LGBT outdoor adventure week	43%	30%	26%	40%	28%	22%
LGBT Pride festival	41%	28%	23%	33%	23%	17%
An LGBT professional conference	41%	32%	24%	38%	21%	23%
LGBT high energy dance event	31%	17%	9%	13%	7%	7%
LGBT film festival	23%	17%	21%	15%	13%	17%
A yoga or healing retreat with an LGBT focus	21%	16%	14%	24%	21%	17%
LGBT sports events or tournaments	15%	12%	11%	20%	12%	17%
An event for gay male bears	25%	18%	19%	0%	0%	0%
An event specifically for lesbians / women	0%	0%	0%	47%	37%	42%



**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 are interested activities that are LGBT-dedicated.



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



**Gender Comparisons:** Preference by gender is relatively the same, except for bars and nightclubs where gay men prefer an all-gay atmosphere.



**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	64%	10%	13%	53%	6%	21%
Going to a bar for a drink	55%	15%	25%	44%	12%	35%
Going on a lunch or dinner cruise	31%	19%	45%	28%	14%	51%
Going on an inter-island cruise	31%	21%	43%	28%	14%	51%
Going on a catamaran or sailboat ride	28%	20%	43%	22%	12%	58%
Attending a luau	25%	22%	46%	22%	16%	57%
Going on a Limo, Van/Bus Tour	21%	21%	45%	21%	13%	51%
Going on a group nature hike	18%	23%	49%	18%	14%	59%
Going on a Boat/Submarine Tour, Whale Watching	18%	23%	53%	14%	15%	64%
Going on a snorkel trip	17%	20%	45%	15%	14%	61%
Attending a Live Music or Stage Show	14%	27%	53%	16%	16%	62%
Going on a historical tour	12%	27%	57%	11%	18%	69%

## Generation Comparisons: There were no substantive differences by generation.



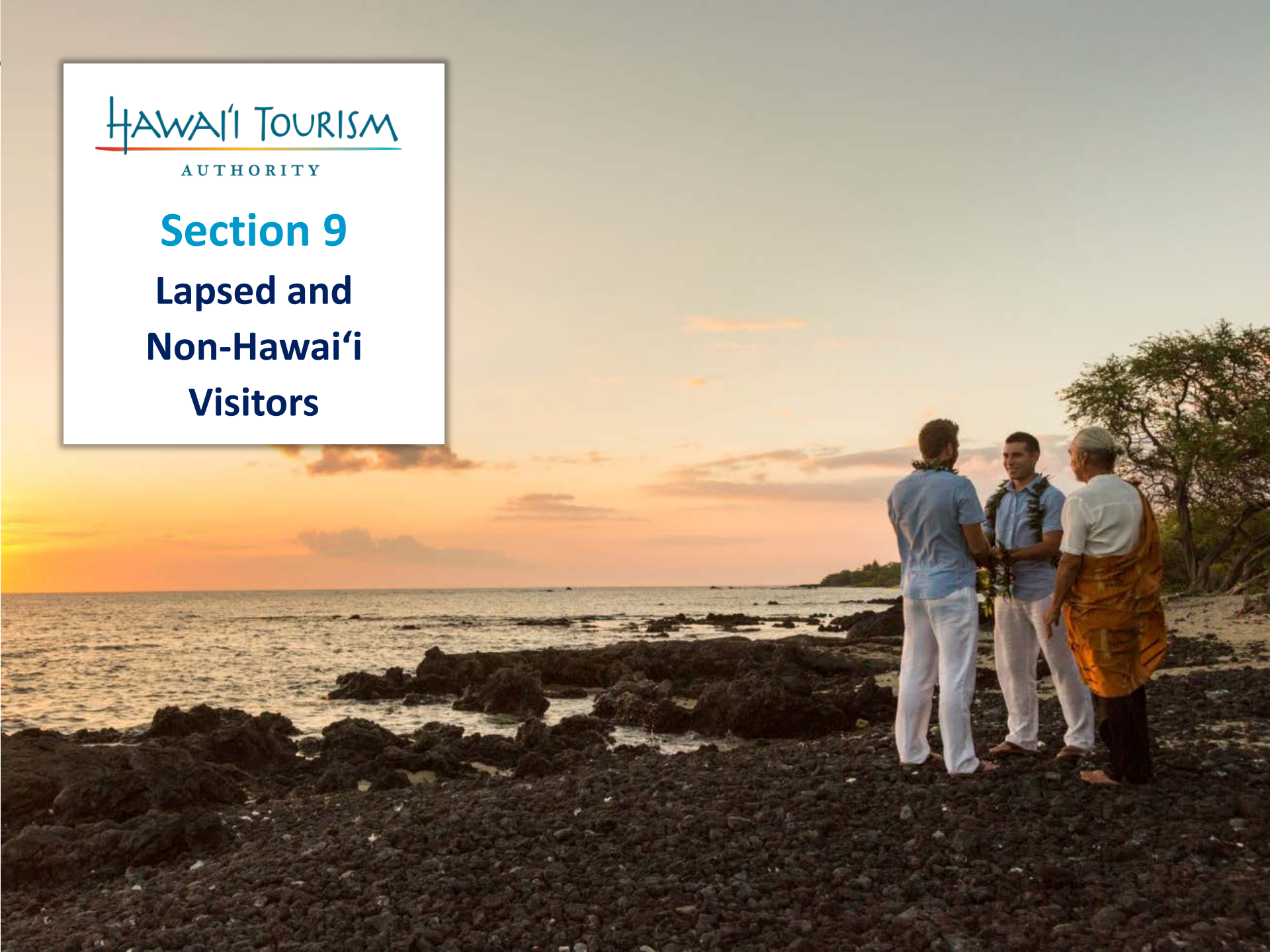
When traveling to Hawai'i, how important is it to you that the following activities are dedicated to LGBT community members vs. a mix of all people?

	Millennials who prefer the activity to be in a...			Gen X who prefer the activity to be in a...			Boomers who prefer the activity to be in a...		
	LGBT Group	Mixed Group	Either is fine	LGBT Group	Mixed Group	Either is fine	LGBT Group	Mixed Group	Either is fine
Going to a nightclub to dance	64%	8%	18%	61%	9%	17%	56%	9%	15%
Going to a bar for a drink	50%	14%	31%	49%	15%	30%	51%	12%	29%
Going on an inter-island cruise	27%	18%	50%	28%	22%	44%	31%	15%	46%
Going on a lunch or dinner cruise	26%	17%	49%	29%	19%	47%	32%	15%	46%
Attending a luau	23%	20%	52%	24%	22%	49%	23%	18%	51%
Going on a catamaran or sailboat ride	22%	17%	56%	25%	21%	47%	27%	14%	49%
Going on a group nature hike	19%	15%	59%	16%	23%	53%	18%	18%	52%
Going on a Limo, Van/Bus Tour	19%	17%	46%	21%	20%	47%	23%	15%	48%
Going on a Boat/Submarine Tour, Whale Watching	18%	17%	58%	17%	23%	57%	16%	19%	58%
Attending a Live Music or Stage Show	17%	22%	57%	13%	27%	57%	15%	21%	57%
Going on a snorkel trip	16%	15%	57%	15%	22%	53%	17%	15%	50%
Going on a historical tour	13%	22%	63%	9%	28%	60%	12%	20%	65%

HAWAII TOURISM

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**Section 9**  
**Lapsed and**  
**Non-Hawai'i**  
**Visitors**



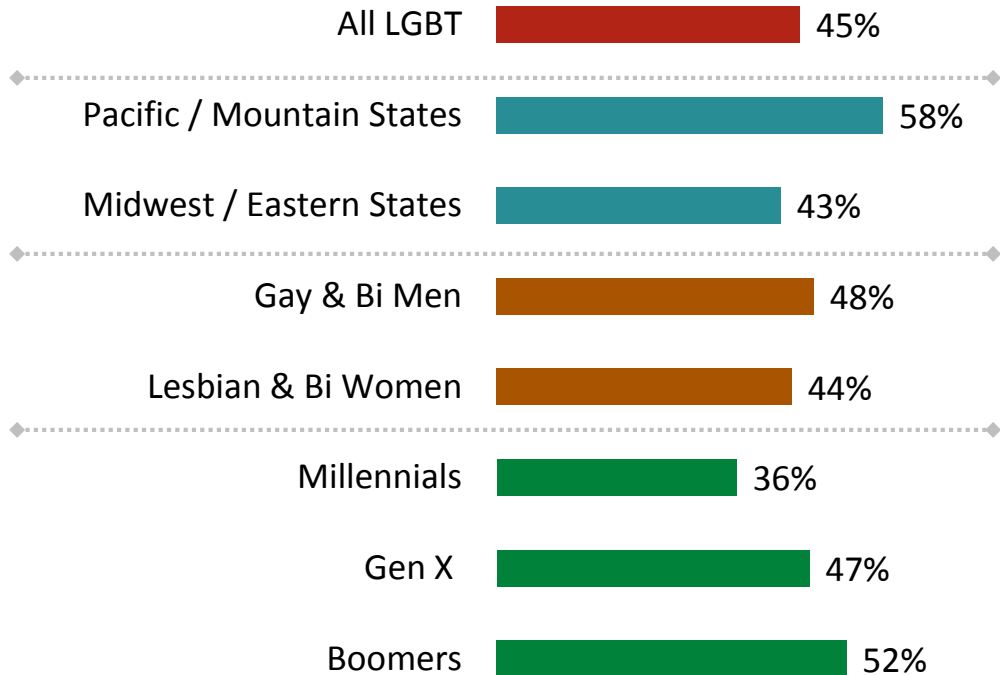
**Non-Visitor Consideration:** Almost half of LGBT non-visitors indicated that they had previously considered traveling to Hawai'i but decided not to visit. Demographically, the consideration rate is relatively stable, with expected higher rates for people living on the West Coast and Baby Boomers.



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

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

**Among Those Who Never Visited Hawai'i as an Adult**



**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 48%



Better value at another destination 32%



Not enough time to travel 25%



Flight to Hawaii is too long 23%

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

Not enough LGBT-dedicated activities Only 6%

Hawai'i is not an LGBT friendly destination Only 3%

Not recommended by family or friends Only 1%

## 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.)

	All LGBT	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Boomers
<b>Financial reasons/travel costs</b>	<b>48%</b>	<b>42%</b>	<b>57%</b>	<b>60%</b>	<b>56%</b>	<b>39%</b>
<b>Better value at another destination</b>	<b>32%</b>	<b>34%</b>	<b>30%</b>	<b>39%</b>	<b>34%</b>	<b>28%</b>
<b>Not enough time to travel</b>	<b>25%</b>	<b>25%</b>	<b>24%</b>	<b>27%</b>	<b>24%</b>	<b>25%</b>
<b>Flight to Hawai'i is too long</b>	<b>23%</b>	<b>24%</b>	<b>21%</b>	<b>20%</b>	<b>23%</b>	<b>23%</b>
Prefer other destinations	21%	25%	15%	8%	17%	29%
Not sure which island(s) In Hawai'i to visit	11%	11%	12%	16%	12%	8%
Prefer destinations closer to home	10%	11%	8%	7%	9%	11%
No family or friends to visit there	9%	10%	7%	12%	7%	10%
Not familiar with what there is to see and do in Hawai'i	8%	9%	6%	9%	7%	9%
<b>Not enough LGBT-dedicated activities</b>	<b>6%</b>	<b>8%</b>	<b>2%</b>	<b>5%</b>	<b>4%</b>	<b>7%</b>
<b>Hawai'i is not an LGBT friendly destination</b>	<b>3%</b>	<b>3%</b>	<b>2%</b>	<b>3%</b>	<b>2%</b>	<b>3%</b>
On the list, will visit for sure	2%	2%	2%	3%	2%	1%
Have young children at home and cannot travel long distances	2%	1%	3%	1%	5%	0%
Not interested	2%	2%	1%	1%	2%	2%
Been there and had a bad experience	1%	2%	0%	1%	0%	1%
Not recommended by family or friends	1%	1%	1%	1%	1%	1%
Never gave it a thought	1%	1%	1%	2%	0%	1%
Safety concerns in Hawai'i	0%	1%	0%	0%	0%	1%
Other reasons	3%	2%	5%	3%	1%	5%

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## Section 10 Marketing And Outreach







## Section Summary: Marketing and Outreach



Marketing and outreach to the LGBT community is 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 that are 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 a quarter of participants look at an LGBT-specific print publication, and about half look at an LGBT-specific website. There are significant demographic differences. Gay men are more involved in the LGBT media than are lesbians. Baby Boomers are more engaged in LGBT print publications than are Millennials.



Past 5-year visitors to Hawai'i have similar LGBT media consumption patterns as all LGBT participants.



There are dozens of regional LGBT print publications for HTA to consider. About half of the participants indicated that they viewed these publications in the past three months, trending stronger among older men.



While Advocate, Out and Curve magazine readership profiles are quite strong, these readership percentages are probably unrealistic given their circulation numbers. Most likely the results reflect brand recognition and readership of the last remaining LGBT national magazines.



## Section Summary: Marketing and Outreach



The survey tested three-month readership of a number of general population magazines. Some of the top performers were travel and food magazines such as Travel & Leisure, Conde Nast Traveler, Bon Appetit and Food & Wine. When HTA advertises or gains editorial coverage in these magazines, about 23% of the LGBT participants might take notice. Hawai'i visitors especially read mainstream travel magazines.



With recent LGBT digital media company consolidation, the top LGBT websites are within four companies: Huffington Post, Here Media, Q.Digital and Towleroad. Since most of these websites have a more male focus, advertising would reach more gay men than lesbians. There are some lesbian-specific websites such as Autostraddle and Curve that are popular with lesbians.



Social media engagement in the LGBT community is very strong, and across all generations, especially with Facebook. HTA may target LGBT travelers on Facebook quite easily for advertising and promotions. Other social media tends to be more generational, with much stronger Millennial use.

## 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?



	All LGBT	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Boomers	Past 5-Year Visitors
Weekly	22%	25%	17%	14%	22%	25%	23%
Monthly	30%	32%	26%	27%	27%	32%	30%
A few times a year	37%	31%	44%	40%	40%	33%	36%
Never	12%	11%	12%	18%	12%	9%	11%



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



	All LGBT	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Boomers	Past 5-Year Visitors
Weekly	51%	61%	35%	53%	48%	53%	50%
Monthly	20%	19%	22%	23%	20%	17%	22%
A few times a year	25%	18%	37%	20%	28%	25%	24%
Never	4%	3%	7%	4%	4%	5%	5%

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## 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 attempt to track the flow of LGBT travel from inspiration of travel to planning/booking a trip, right through to activities at the chosen destination. Five charts are presented to view differences between all LGBT, Hawai'i visitors, Millennials, Generation X and Baby Boomers.



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



Destination websites, while not a key source 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.



## Section Summary: Planning, Booking and In-destination Motivators



We do see differences by generation. Concentrating on **Generation X**, which the research indicates is the generation with most interest for future visits to Hawai'i, top performing motivators are:



**Travel Inspiration:** Recommendations from friends, social media, destination websites



**Travel Planning and Booking:** Airline websites, hotel websites, online booking sites



**In-Destination:** Travel apps, destination websites, guidebooks

**Other generational differences:**



- Baby Boomers are most likely to use a travel agent for travel booking, at 23%, compared to 8% for Millennials
- Millennials are most likely to use on-line booking sites (90%)
- Mainstream media and LGBT media have about equal levels of influence on all three generations
- Social media as an influencer is far more important to Millennials
- The use of smartphone travel apps are surprisingly strong across all three generations, but strongest with Generation X
- Destination website use is surprisingly level across generations



## 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	15%	<b>91%</b>	9%	3%
Hotel website	20%	<b>88%</b>	11%	3%
Recommendations from friends or relatives	<b>70%</b>	39%	17%	9%
Destination website	47%	<b>60%</b>	26%	10%
Online booking sites (e.g., Expedia, Travelocity)	24%	<b>77%</b>	8%	14%
Mainstream travel websites or blogs	<b>53%</b>	35%	11%	25%
Travel guide books (e.g., Fodors, Frommers)	35%	47%	30%	26%
Travel apps	30%	48%	<b>40%</b>	26%
Adventure/outdoor/travel magazines	<b>53%</b>	21%	10%	31%
LGBT websites or blogs	46%	28%	10%	34%
Social media (e.g., Facebook, Instagram, Pinterest)	49%	22%	15%	35%
LGBT magazines	40%	16%	8%	46%
Television/Radio	40%	10%	9%	49%
Travel agent	7%	18%	3%	<b>77%</b>

## Travel Planning Flow Chart: All LGBT



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

### Among All LGBT

	Travel Inspiration	Travel Planning and Booking	In-Destination	Do Not Use
Airline website	16%	<b>91%</b>	8%	4%
Hotel website	20%	<b>87%</b>	11%	5%
Recommendations from friends or relatives	<b>70%</b>	43%	20%	8%
Online booking sites (e.g., Expedia, Travelocity)	25%	<b>83%</b>	9%	9%
Destination website	49%	<b>55%</b>	30%	12%
Mainstream travel websites or blogs	49%	32%	10%	30%
LGBT websites or blogs	48%	27%	12%	32%
Social media (e.g., Facebook, Instagram, Pinterest)	<b>52%</b>	23%	19%	32%
Travel guide books (e.g., Fodors, Frommers)	32%	40%	30%	32%
Travel apps	27%	41%	<b>37%</b>	34%
Adventure/outdoor/travel magazines	45%	16%	10%	40%
LGBT magazines	40%	18%	8%	44%
Television/Radio	37%	9%	8%	<b>51%</b>
Travel agent	5%	17%	2%	<b>80%</b>



## Travel Planning Flow Chart: Millennials



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

### Among Millennials

	Travel Inspiration	Travel Planning and Booking	In-Destination	Do Not Use
Recommendations from friends or relatives	<b>76%</b>	<b>55%</b>	<b>36%</b>	4%
Online booking sites (e.g., Expedia, Travelocity)	25%	<b>90%</b>	9%	5%
Airline website	16%	<b>91%</b>	10%	7%
Hotel website	16%	<b>89%</b>	14%	7%
Social media (e.g., Facebook, Instagram, Pinterest)	<b>66%</b>	32%	29%	18%
Destination website	46%	<b>51%</b>	<b>35%</b>	22%
Mainstream travel websites or blogs	<b>54%</b>	32%	15%	31%
LGBT websites or blogs	<b>54%</b>	24%	15%	34%
Travel apps	30%	41%	<b>39%</b>	39%
Travel guide books (e.g., Fodors, Frommers)	30%	33%	32%	42%
Adventure/outdoor/travel magazines	44%	19%	13%	43%
LGBT magazines	37%	16%	9%	<b>54%</b>
Television/Radio	37%	5%	9%	<b>55%</b>
Travel agent	4%	8%	1%	<b>90%</b>

## Travel Planning Flow Chart: Gen X



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

### Among Gen X

	Travel Inspiration	Travel Planning and Booking	In-Destination	Do Not Use
Airline website	17%	<b>93%</b>	9%	2%
Hotel website	20%	<b>90%</b>	12%	4%
Online booking sites (e.g., Expedia, Travelocity)	29%	<b>83%</b>	10%	7%
Recommendations from friends or relatives	<b>74%</b>	44%	21%	8%
Destination website	<b>54%</b>	<b>55%</b>	34%	10%
Social media (e.g., Facebook, Instagram, Pinterest)	<b>58%</b>	26%	23%	26%
Travel apps	28%	47%	<b>44%</b>	27%
Mainstream travel websites or blogs	<b>52%</b>	35%	11%	28%
LGBT websites or blogs	49%	27%	14%	33%
Travel guide books (e.g., Fodors, Frommers)	34%	39%	30%	34%
Adventure/outdoor/travel magazines	46%	18%	11%	38%
LGBT magazines	42%	15%	10%	44%
Television/Radio	39%	13%	7%	47%
Travel agent	4%	14%	2%	<b>83%</b>

## Travel Planning Flow Chart: Boomers



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

### Among Boomers

	Travel Inspiration	Travel Planning and Booking	In-Destination	Do Not Use
Airline website	15%	<b>90%</b>	7%	3%
Hotel website	21%	<b>86%</b>	9%	4%
Destination website	47%	<b>58%</b>	25%	9%
Recommendations from friends or relatives	<b>64%</b>	37%	14%	10%
Online booking sites (e.g., Expedia, Travelocity)	23%	<b>81%</b>	7%	10%
Travel guide books (e.g., Fodors, Frommers)	33%	44%	28%	27%
Mainstream travel websites or blogs	46%	31%	8%	30%
LGBT websites or blogs	46%	29%	9%	30%
Travel apps	25%	38%	32%	36%
LGBT magazines	42%	21%	7%	39%
Adventure/outdoor/travel magazines	46%	15%	9%	39%
Social media (e.g., Facebook, Instagram, Pinterest)	42%	17%	13%	42%
Television/Radio	36%	8%	8%	<b>53%</b>
Travel agent	5%	23%	1%	<b>74%</b>

**Destination Websites (From CMI’s Annual LGBT Travel Study):** This chart is presented in this report as it relates to a Key Finding. One of the most common questions that tourism bureaus ask CMI is about the value of LGBT microsites on the destination's website. The findings indicate that LGBTs do value these LGBT-specific microsites, but want to see LGBT imagery included in the destination’s general website as well.

Some destination/tourism bureaus have “LGBT sections” on their websites.  
 Do you agree or disagree with these statements?  
*% in Agreement*

	Gay and Bisexual Men	Lesbians and Bisexual Women	Millennials	Gen X	Boomers
<i>Having an LGBT website makes me feel that the tourism bureau is LGBT-friendly.</i>	89%	91%	89%	89%	91%
<i>A tourism website should do both, have LGBT imagery throughout the site and offer a specific LGBT page of information.</i>	85%	87%	85%	84%	88%
<i>Having an LGBT website makes me more likely to visit a destination.</i>	72%	70%	71%	70%	73%
<i>Including LGBT imagery throughout a website is more important than an LGBT-specific section.</i>	57%	69%	66%	65%	61%
<i>I have viewed a tourism bureau’s LGBT page in the past 12 months.</i>	54%	36%	37%	46%	50%
<i>LGBT sections on tourism bureau websites are no longer needed.</i>	11%	9%	11%	11%	8%

# Mahalo...

## For more information:

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