



HAWAII TOURISM

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Reaching LGBT Travelers: Mainland China Report

*Profile of Chinese International Visitors
and Non-International Visitors*

December 2016

Produced by

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



ABOUT CMI

25 YEARS OF LGBT INSIGHTS



- › Community Marketing & Insights (CMI) has been conducting LGBT consumer research for 25 years. Our practice includes online surveys, in-depth interviews, intercepts, focus groups (on-site and online), and advisory boards. Industry leaders around the world depend on CMI’s research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, measurable marketing planning and assessment of return on investment.
- › Key findings have been published in the New York Times, Washington Post, Chicago Tribune, Los Angeles Times, Wall Street Journal, Forbes, USA Today, Chicago Tribune, Miami Herald, CBS News, NPR, CNN, Reuters, Associated Press, eMarketer, Mashable, and many other international, national and regional media.
- › CMI’s other research clients include leaders from a wide range of industries. In the past few years, studies have been produced for these and many other clients: VISIT FLORIDA, Empire State Development Corp., Las Vegas Convention & Visitors Authority, NYC & Company, Visit Orlando, Greater Fort Lauderdale CVB, Palm Springs Bureau of Tourism, Travel Portland, Choose Chicago, Tourism Toronto, Argentina Tourism Office, Hawaiian Airlines, Hyatt Hotels, Prudential, Wells Fargo Bank, Aetna, Target Brands, Hallmark, DirecTV, Johnson & Johnson, WNBA, American Cancer Society, Kaiser Family Foundation and numerous other corporations and organizations across North America and around the world.



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Section 1

Research Methodology





Methodology and Understanding the Report

In November 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 in mainland China. 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 RMB cash prizes was provided to encourage participation in the study.

This report covers mainland China residents only. Participants were recruited from the Community Marketing & Insights LGBT research panel with the following qualifications:

- Identifies as a member of the LGBT community
- Age 21 or over

Unlike the North American study, the China survey didn't exclude certain demographics, because very few studies have been done about this specific cohort. Terminating participants based on age and income might eliminate some valid insights. The sample represented the Chinese LGBT community members who are active in LGBT media, social apps and events, in other words, representing the visible and reachable portion of the estimated 60+ million community.

Results were reported based on respondents' travel history in the past three years: Those who have taken at least one leisure trip outside mainland China to a foreign country or Hong Kong, Macao or Taiwan in the past three years were categorized as "**International Travelers**," while those who have not taken any leisure trips outside mainland China were categorized as "**Non-International Travelers**".

The survey has a margin of error of ±4.46% 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.



Mainland China LGBT Research Respondent Profile (N=483)

More gay and bisexual men participated in the study than did lesbian and bisexual women. 92% of the respondents were under the age of 35. 65% earned a monthly household income of over 5,000 RMB. Top provinces and cities were economically advanced areas like Shanghai, Beijing and Guangdong.

Identity



Gay & Bi Men 66%



Lesbian & Bi Women 32%

Transgender 2%

Age

21-24 40%

25-29 35%

30-34 16%

35 or more 8%

Monthly Household Income

Under 5,000RMB 27%

5,000 – 9,999 RMB 29%

10,000 – 14,999 RMB 18%

15,000 – 19,999 RMB 9%

20,000 – 49,999RMB 7%

50,000RMB or more 2%

Prefer not to answer 8%

Top Provinces and Cities

Shanghai 16%

Beijing 14%

Guangdong 10%

Sichuan 6%

Jiangsu 5%

Chongqing 5%

Zhejiang 5%

*All Provinces and Autonomous Areas represented except Tibet.



Mainland China LGBT Research Respondent Profile (N=483)

Due to the young age of the community members, most of the respondents were single or dating. 29% reported living with a same-sex partner, while 3% said they've already married an opposite-sex partner. Only 3% of the Chinese young LGBTs have children under age 18. It's a highly educated cohort of individuals: 73% obtained at least a bachelors degree. In addition, 81% of the respondents were either employed by others or self-employed.

Relationship

Single or Dating	66%
Living with a same-sex partner	29%
Married an opposite-sex partner	3%
Other	2%

Education



Post Graduate Degree	18%
College Graduate	55%
High School	27%

Children

3% Have children under age 18

Employment

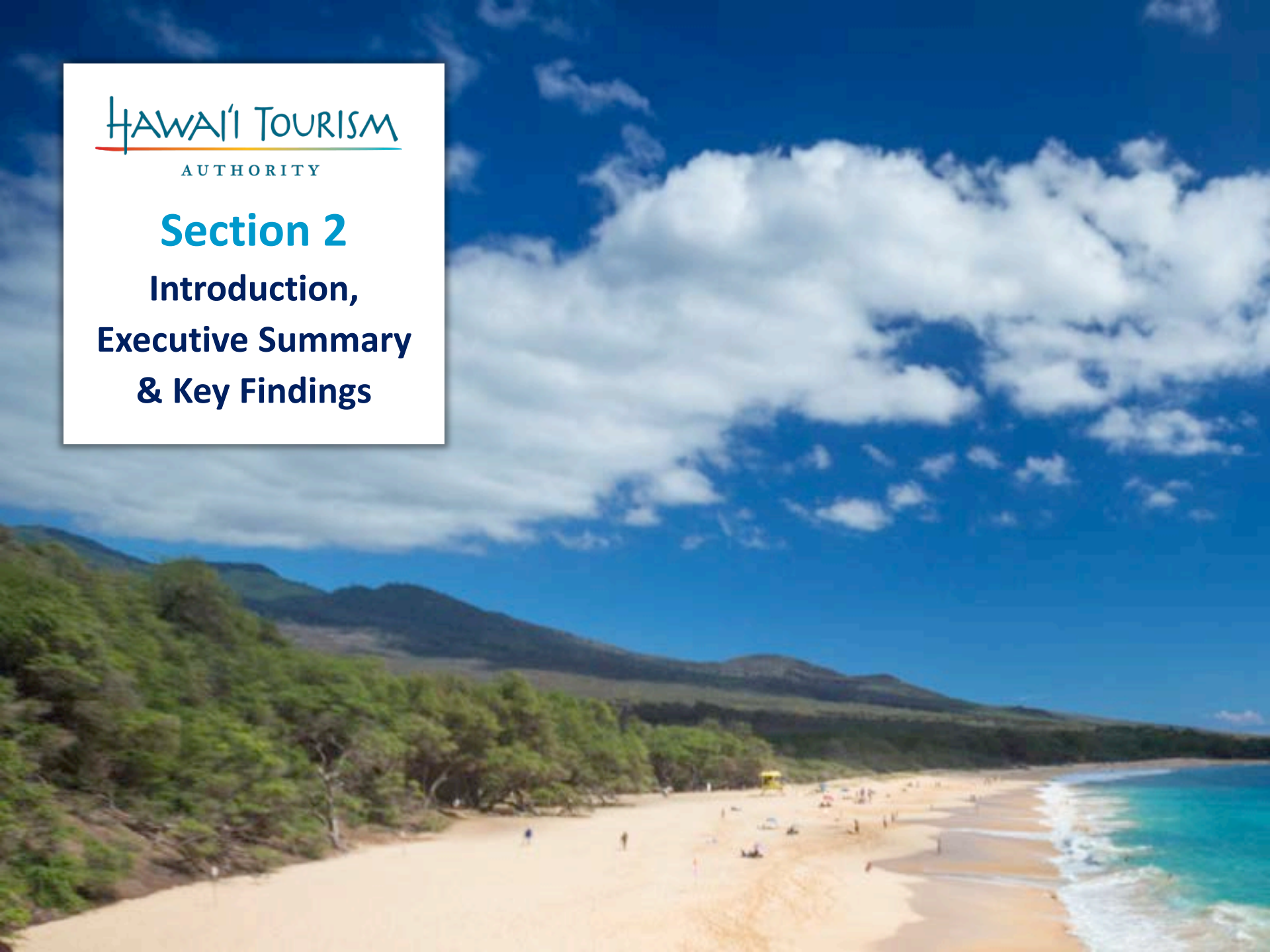
Employed, FT/PT	71%
Student	15%
Self-Employed	10%
Other	4%

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Section 2

Introduction,
Executive Summary
& Key Findings





An Introduction to the LGBT Community in Mainland China

- In mainland China, CMI estimates that the number of LGBT people is around 65 million with a purchasing power of about \$470 billion.
- Active Chinese LGBT community members are more male-skewed. Gay and bisexual men are more likely to consume LGBT media, social apps and events than lesbian and bisexual women. However, women are likely to be found in smaller local LGBT groups or general women's groups.
- Chinese LGBTs are more likely to be living in big cities due to urban economic opportunities and more open and tolerant social environment.
- China's LGBT community is a young community. Those who are out and visible tend to be born after 1980, when China opened its doors to the world, and western culture and values became more accepted.
- Currently, there are no laws in mainland China to protect LGBT people. Adult homosexuality was not legal until 1997, and was considered to be a mental illness until 2001.
- In collectivist culture, it's considered shameful for someone to deviate from the cultural norm, and they are considered to have bad character or to be weak. Because of that, LGBT people in China often bear stigma and discrimination from society and their families. Furthermore, failure to have children to carry on the family line is considered disrespectful to parents and ancestors.
- Because of the social stigma and legal risks, most Chinese LGBT people of the older generation were forced into heterosexual marriage, and are therefore difficult to reach through LGBT-specific outreach.



An Introduction to the LGBT Community in Mainland China

- Significant progress has been made to improve the LGBT community's visibility and society's acceptance over the past 5 years.
 - **Venture capital** has recognized the potential spending power of the Chinese LGBT community. Several big same-sex mobile social apps have received millions of dollars in funding in the past few years. The largest app Blued claims 27 million users worldwide and a value estimation of US \$600 million.
 - **Brands** in China are testing the water of the "Pink Market." Alibaba's Taobao sponsored 7 same-sex couples to get married in the United States in 2015. Dozens of Chinese companies like Tmall, DiDi and Haier released rainbow-themed ads or logos voicing support to the LGBT community. These corporate moves followed the US Supreme Court's decision to legalize same-sex marriage in the summer of 2015.
 - **Pop culture** has improved the visibility of the LGBT community. Openly out talk show hosts Cai Kangyong and Jin Xing even talked about coming out in one issue of mainstream show *Let's Talk*. Gay sitcom *Addicted*, written by a straight girl, generated 100 million views in only the first 6 episodes.
- The same-sex mobile social apps are the forerunner in China's LGBT movement, and have become primary LGBT news outlets with their financial advantage and large user base. These LGBT apps are more important than LGBT print media or websites.
- It's very hard for LGBT non-profits to obtain a license from the government if the word 同性恋 (homosexual) appears in their description. This discriminative environment forced many organizations to become registered as HIV prevention organizations or for-profit companies. The largest LGBT non-profit in the country is PFLAG China with 150,000 registered users.



LGBT Research Executive Summary & Key Findings

Chinese LGBT International Travelers

Chinese LGBTs are traveling internationally. 48% traveled outside mainland China in the past 3 years. On average, they took 0.5 trips to Hong Kong, Macao or Taiwan and 0.8 trips to a foreign destination every year for the past three years. Those who travel internationally tend to be living in big cities, over the age of 25, partnered and have a monthly household income of over 10,000 RMB. Considering the age of the LGBT China panel, these international travel rates are excellent.

Visitation to Hawaii

This study found that only 3% of the international travelers have been to Hawaii in their lifetime. Though the number is low, the Chinese LGBT community as a whole is a young and emerging market, and lack of long-distance travel is partially a function of age. However, with the enormous size of the China LGBT community, growing the number of LGBT travelers to Hawaii is a distinct opportunity.

Chinese LGBT International Travel: Actual Destination Visitation

Of those research participants who traveled internationally, top destinations for Chinese LGBTs are Asian countries or regions that are either close to mainland China or affordable to visit. Thailand's performance was strong, second only to Hong Kong. Paris, France is the most popular long-haul destination with 10% of the international LGBT travelers visiting in the past three years. That percentage is impressive and shows Hawaii's potential with the right offer/outreach. Most other continental United States, Australia and European destinations listed were within the 6%-7% range. Hawaii attracted 3% of the international travelers and Florida attracted 2% of the international travelers.



Executive Summary & Key Findings

Chinese LGBT International Travel: Future Visitation

Questions regarding future travel are more about perceptions and desirability than a good predictor of actual travel. 10% of the international traveler participants expressed interest in traveling to Hawaii in the next two years. Hawaii placed in the third tier of interest, among destinations like Florida and Las Vegas. On the first tier were Asian destinations and Australia (24% to 62% range). On the second tier were mostly destinations in the Continental USA and in Europe (15% to 19% range). Thailand received a 44% future interest rating, about four times higher than Hawaii. For young people, Thailand's affordability is unbeatable. The cost of visiting Bangkok is lower than big Chinese cities like Beijing and Shanghai. Plus it's extremely easy for a Chinese citizen to get the visa to visit Thailand, and the destination has long been perceived as LGBT-friendly. Non-international travelers' intention to travel outside of Asia is very low, and Hawaii falls to 2% for this group.

LGBT-Friendly Rating

LGBT-friendliness is a top attribute when considering traveling outside China (44%) for international travelers. Thailand is the gay Mecca for Chinese LGBT people. 69% of international travelers and 59% of non-international travelers marked it as safe and popular for LGBTs. Taiwan ranked second, being a pioneer of LGBT rights in Asia. Most developed country destinations earned a 20%-35% LGBT-friendly rating. Some Southeast Asian destinations ranked low, most likely because of anti-LGBT laws and hostile social attitude towards LGBT people in recent years. Hawaii received a 20% LGBT-friendly rating from the China LGBT participants.



Executive Summary & Key Findings

LGBT Offerings

Even though Chinese LGBTs are concerned about LGBT-friendliness when planning vacations outside mainland China, they are not specifically seeking LGBT-related activities at the destination. Most LGBT-related activity options received around 20% throughout the whole survey, with an exception of LGBT events like Pride and film festivals, which received 33%. When asked to select their top five reasons that they take vacations, only 20% of the respondents selected, “to experience the local LGBT scene while on vacation,” while about half of them selected, “to connect with my spouse or partner.” When asked about the attributes in their desire to travel outside China, only 22% of the international travelers selected, “LGBT bars and nightlife” and 13% selected, “a large LGBT local destination.” “LGBT neighborhood” received 22% from international travelers. The reasons behind the low desire of LGBT activities might be because young Chinese LGBTs are still first-time visitors to international destinations, and they are still exploring the general-interest attractions before looking into LGBT options. Another reason might be the limited resources in China describing the LGBT scene in destinations.

Profile of Last International Vacation

During their last vacation outside mainland China, the LGBT international travelers spent an average 6.4 nights away. There were on average 2.0 people in each travel party. 26% said that the trip was part of a pre-paid tour package. 100% of these packages included airfare and 95% of them included accommodation. The average spending per person on pre-paid packages is 8,815RMB and the average total spending per person including pre-paid package is 25,387RMB. Hotels (82%) are the most popular accommodation type among Chinese LGBTs. And they are most likely to travel with same-sex partners and coworkers/classmates.



Executive Summary & Key Findings

Reasons to Travel, Destination Selection & Hawaii Attributes

Top destination selection criteria and reasons to travel among Chinese LGBT international travelers are safety and security, relax and unwind, food and cuisine, connect with partner, beaches, natural sightseeing, and history and cultures. When asked if these reasons might motivate you to visit Hawaii in the future, international travelers showed interest in, “Hawaii offers great beaches” (50%), “Hawaii is a safe and secure place” (41%), “Hawaii provides a sense of relaxation, a place to unwind” (40%), “Hawaii offers quality culinary and dining experiences” (39%) and “Hawaii is romantic” (39%).

Concerns and What’s Holding Back LGBT Travel to Hawaii

The top reason for Chinese LGBT international visitors to not visit Hawaii was, “not enough time to travel” (47%). Hawaii is a long-haul destination taking 9 hours to fly direct from China, which is not suitable for short trips. Travel costs (37%) is another reason that Chinese LGBTs didn’t visit Hawaii. Another reason was, “Difficult to obtain a US visa” (35%). In China, developed countries’ embassies are paying special attention to those tourist visa applicants who are over the age 25 and single. It’s not uncommon that LGBTs with decent jobs and income to get denied a visa to the US and Europe. More and more countries (e.g. Thailand) have simplified their visa application process, or even offer visa-free entry for Chinese citizens. Another concern for Hawaii is that it may be considered to be “like” some other destinations. Thailand offers some of the beach and tropical attractions similar to Hawaii, yet at a much cheaper price and with easier access. Urban LGBTs in China may prefer to travel to Thailand for their beach vacation and a destination like London, Paris or San Francisco for an urban vacation.



Executive Summary & Key Findings

Conclusion

Though the current Chinese LGBT visitation rate to Hawaii is low, it's definitely a market segment worth pursuing in the long run. First, young Chinese LGBTs are still students or recently entering the workforce. They have decades ahead to accumulate wealth and change social opinions about LGBT issues through increased visibility. Plus, they are exploring nearby destinations first, before considering the more long-haul destinations. Second, it's a market that needs to be understood and addressed authentically. Very few destinations have conveyed marketing messages to the Chinese LGBT community. Many destinations are still focused on attracting large volume of general Chinese travelers, but at the same time they need to look ahead at laying the foundations to attract valid niche market segments. Third, the premium tourism resources in Hawaii like beaches, food, and natural scenery are attractive to Chinese LGBTs.



Executive Summary & Key Findings: Outreach Recommendations

Target demographics

Hawaii should focus on Chinese LGBTs living in Tier 1 cities with previous experience traveling outside China. These travelers tend to be coupled, over the age 25 and with a monthly household income of 10,000RMB or more.

Reaching out

Reaching out to Chinese LGBTs should be more digital-based.

- Same-sex mobile apps: 48% of international travelers use same-sex dating apps on a weekly basis. The most popular apps are Blued (34%), Rela (the L) (16%), Zank (13%) and LesDo (11%).
- LGBT websites: 56% of international travelers view LGBT-specific websites, either news or entertainment, on a weekly basis. Blued's parent website danlan.org was viewed by 28% of respondents in the past seven days. The lesbian websites lestalk.org and tongyulala.org were viewed by 8% and 3% respectively.
- LGBT publications: Unlike in the US, there are very few LGBT print publications in mainland China. The most-read publications in the past three months were *Togayther* (9%), *The L-G* (6%), and *Queer Lala Times* (6%).
- General social media: WeChat is the most popular messaging platform in China. 92% of the international travelers use it on at least a weekly basis. 63% of international travelers indicated that they read articles from LGBT-specific WeChat public accounts on a weekly basis. The Chinese approach to Twitter, Sina Weibo, ranked second on the general social media list at 71%.
- General websites: Among websites, weibo.com topped the list at 78%, followed by two video streaming websites lqiyi.com (67%) and youku.com (58%). qq.com ranked fourth at 52%.
- General publications: Top publications read by LGBT international travelers in the past three months are *Chinese National Geography* (32%), *Life Week* (27%), *Bazaar* (26%), *Southern People Weekly Magazine* (22%), *NBWeekly News Reader* (20%), and *Global Times* (20%).

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Section 3

International Travelers Profile

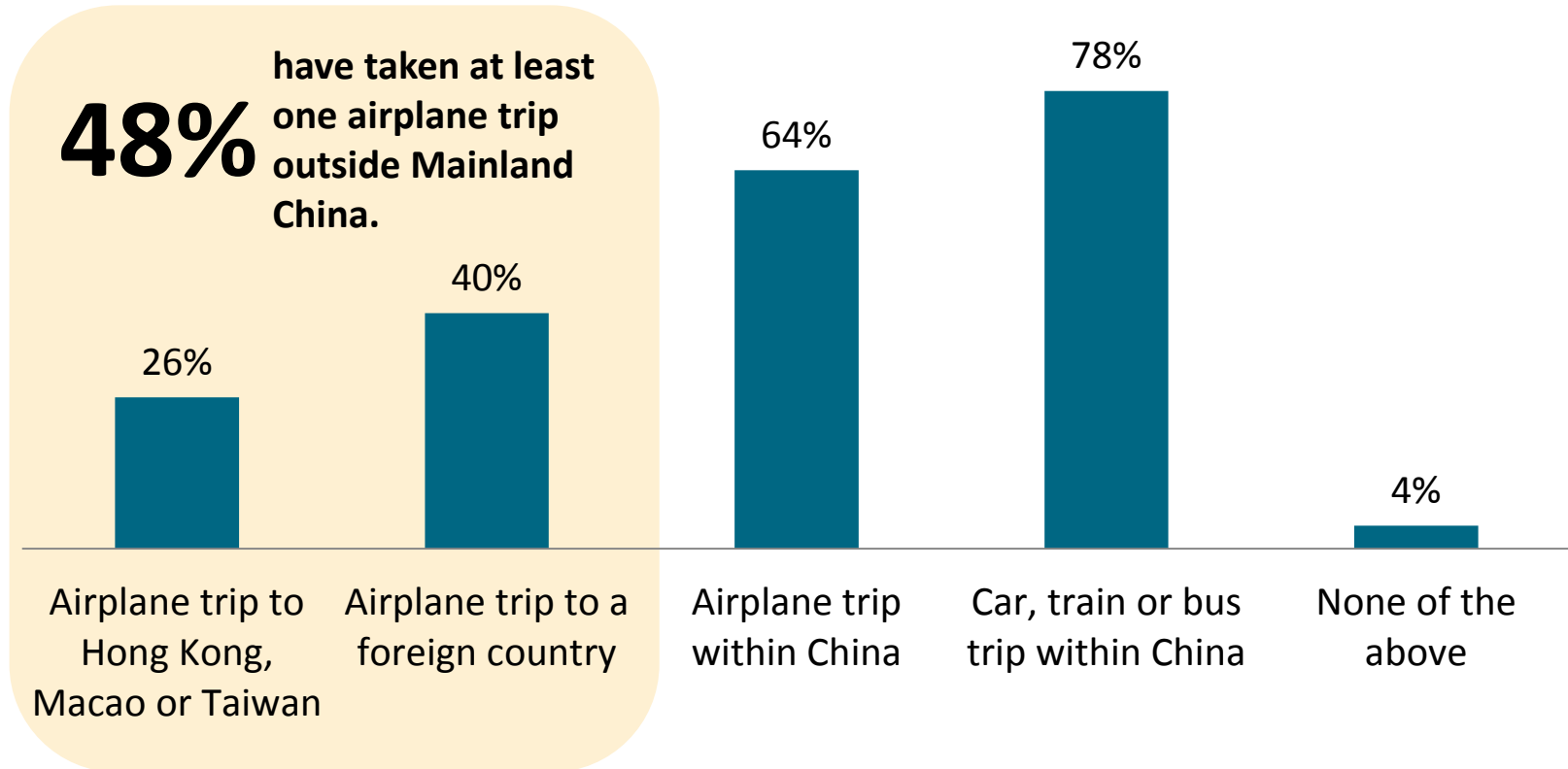




LGBT Visitation Outside Mainland China: Chinese LGBTs do travel; 96% of them traveled in the past 3 years. 26% took at least an airplane trip to Hong Kong, Macao or Taiwan and 40% have traveled to a foreign country for vacation. In total, 48% of the respondents have traveled outside mainland China in the past three years.



**What type of vacations have you taken in the past three years?
(Please check all that apply)**





Vacation History Outside Mainland China: Among those who have traveled outside China by air in the past 3 years, 66% traveled to Hong Kong, Macao or Taiwan and 86% traveled to other international destinations. On average, Chinese LGBT international travelers made 1.6 trips to Hong Kong, Macao and Taiwan and 2.3 trips to foreign destinations. The research indicates that Chinese LGBTs are exploring foreign destinations outside Greater China, to non-Chinese speaking destinations.




Thinking of the past three years, that is, since November 2013, how many times have you traveled by air to.....

Among International Travelers


	Hong Kong, Macao or Taiwan	International Destinations
0	34%	14%
1-2	44%	47%
3-4	11%	23%
5 or more	11%	16%
Average	1.6	2.3



China LGBT International Traveler Profile Highlights

 International Travelers are more likely to be from economically advanced areas like Beijing, Shanghai and Guangdong.

56% Of international travelers were from Beijing, Shanghai or Guangdong.


 International Travelers are age 25 or over and have higher household income.

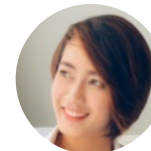
71%
International Travelers

Are Age 25 and Older

58%
International Travelers

Have a Household Monthly Income of 10K RMB or More

 **LGBT Men vs. Women in China**
CMI has seen this in other of our China travel reports as well: Lesbian & bisexual women are more likely to travel internationally than gay and bisexual men.



Women

61%


International Travelers



Men

42%

International Travelers

 International Travelers are more likely to be living with a same-sex partner. While less than 50%, this number is still significant as only 29% of the sample are living with a same-sex partner. This is most likely the combination of older age, higher income and more likely to be living with a partner, as all three characteristics are correlated.

37%

International Travelers

Are Living with a Same-Sex Partner

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Section 4

Competing Destinations






International Travel Destinations: For travel destinations outside mainland China, Hong Kong and Thailand were the undisputed leaders followed by Macao, Japan and Taiwan; all of which being proximate to mainland China and/or affordable destinations. The highest ranking long-haul destination was Paris, France with 10% visitation rate in the past three years. Most continental US destinations were among the 6%-7% category but only 3% of respondents have visited Hawaii.



Which of the following destinations, if any, have you visited in the past three years? (Please select all that apply)


Hong Kong	58%	Bali Island, Indonesia	7%
Thailand	46%	London, UK	7%
Macao	28%	New York, USA	7%
Japan	28%	Australia	6%
Taiwan	26%	Las Vegas, USA	6%
Malaysia	20%	Los Angeles, USA	6%
Singapore	14%	San Francisco, USA	6%
Vietnam	10%	 Hawaii, USA	3%
Paris, France	10%	Florida, USA	2%



Future International Travel Destinations: International travelers showed strong interest in visiting Japan (63%) and Thailand (44%) in the next two years. Australia scored 30%, making it the highest ranking long-haul destination. Most European and continental US destinations were in the 15%-19% range. Hawaii scored 10%, still higher than Las Vegas and Florida.




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

	International Travelers	Non-International Travelers
Japan	63%	30%
Thailand	44%	43%
Taiwan	44%	30%
Australia	30%	9%
Hong Kong	24%	27%
London, UK	19%	5%
New York, USA	18%	4%
Vietnam	18%	12%
Los Angeles, USA	18%	2%
San Francisco, USA	16%	2%
Paris, France	16%	5%
Malaysia	15%	6%
Singapore	15%	7%
 Hawaii, USA	10%	2%
Macao	10%	14%
Las Vegas, USA	8%	0%
Florida, USA	7%	2%
Bali Island, Indonesia	6%	2%
South Africa	4%	0%
None of the above	3%	29%



LGBT-friendly Destinations: Thailand and Taiwan were regarded the safest and most popular destinations by both international travelers and non-international travelers, most likely because of their longtime LGBT-friendly and welcoming reputation. South Africa and Southeast Asian countries scored low. Almost all the European and USA destinations were in the 20%-30% range for both international and non-international travelers, with the exception of Florida.

 **Of the same list, which destinations do you think are safe to travel to and popular for LGBT Travelers. (Pick those you think are the top LGBT vacation destinations for LGBT Travelers.)**

	International Travelers	Non-International Travelers
Thailand	69%	59%
Taiwan	53%	50%
Japan	36%	32%
London, UK	33%	32%
Australia	32%	27%
Los Angeles, USA	31%	18%
New York, USA	30%	25%
San Francisco, USA	30%	23%
Hong Kong	25%	22%
Paris, France	23%	24%
Las Vegas, USA	20%	11%
 Hawaii, USA	20%	20%
Florida, USA	12%	12%
Singapore	8%	11%
Macao	7%	7%
Bali Island, Indonesia	6%	6%
Malaysia	5%	6%
Vietnam	3%	3%
South Africa	2%	2%
None of the above	3%	2%

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Section 5

LGBT Travel Motivations

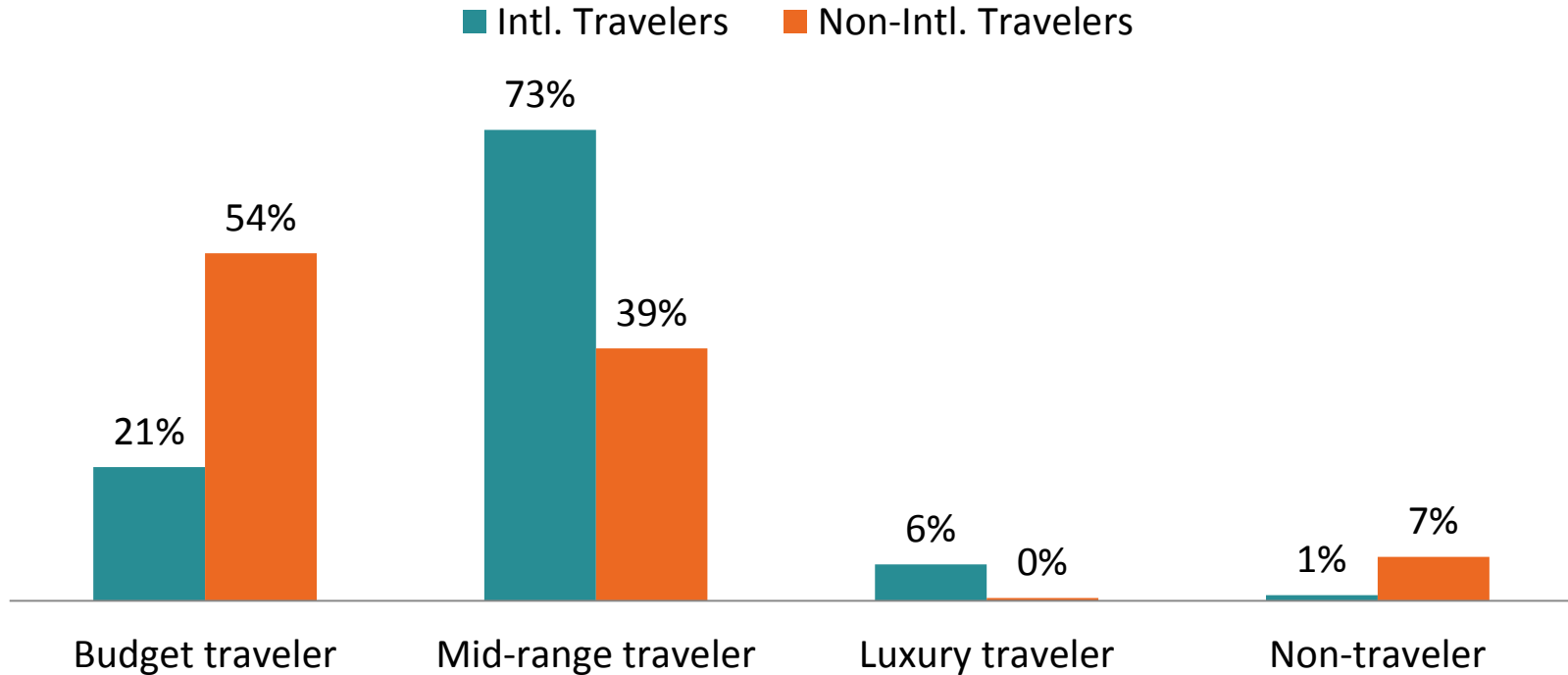




Type of Travelers: 38% of all respondents identified themselves as budget travelers, 55% were mid-ranged travelers, 3% were luxury travelers and 4% were non-travelers. International travelers were more likely to identify as mid-range travelers, while non-international travelers identified as budget travelers.



What type of traveler are you? (Choose only one)





Vacation Motivation: The most important motivations for Chinese LGBTs to take vacations are rest and relaxation, connect with spouse or partner and experience other cultures. Local LGBT scene is not an important motivator with only 20% of respondents selecting the choice (see slide two).

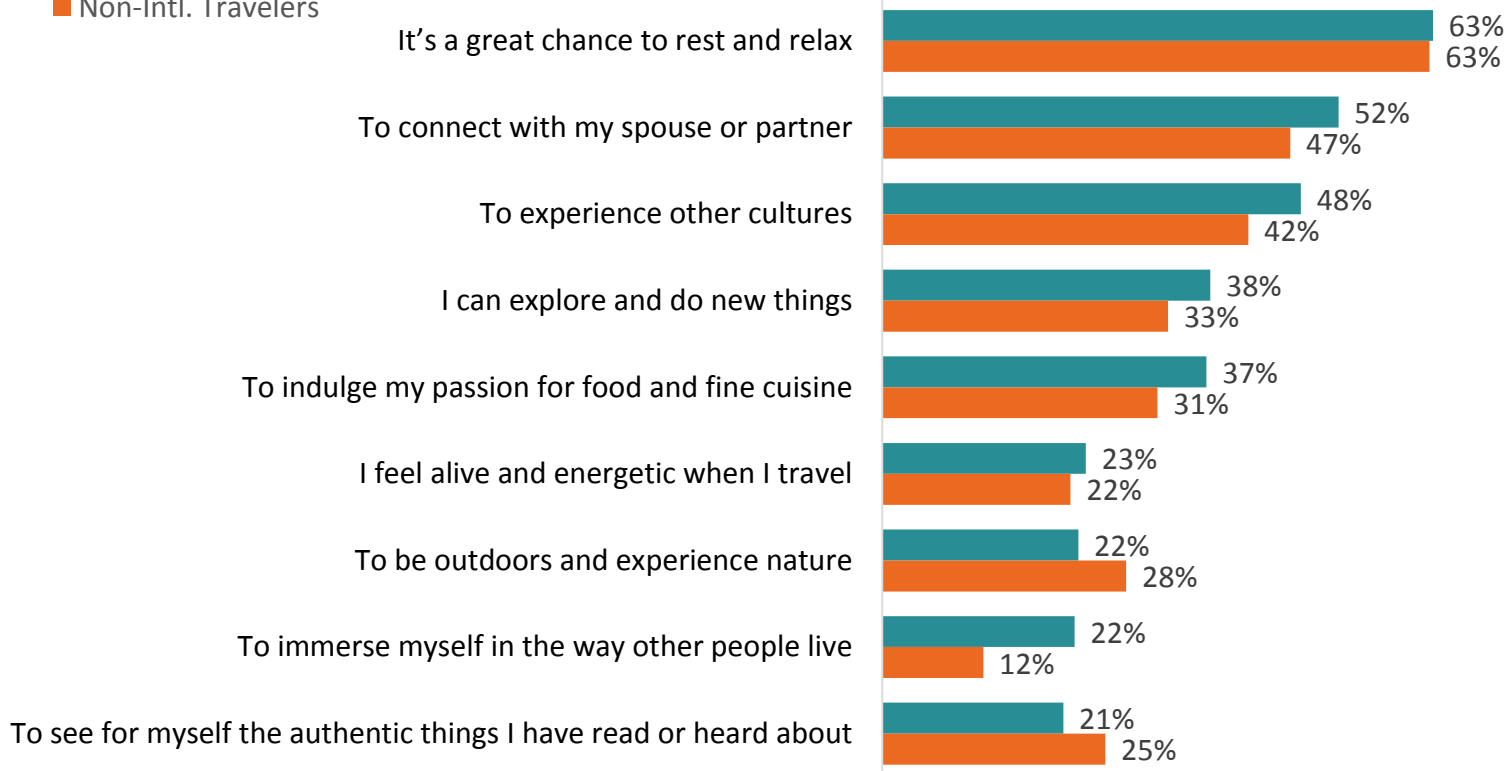


**Of the following reasons, which best describe why you take vacations?
(Please select all your top 5 reasons you take vacations.)**

1/2

■ Intl. Travelers

■ Non-Intl. Travelers

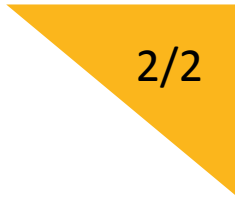




Vacation Motivation: continued list from previous page.



**Of the following reasons, which best describe why you take vacations?
(Please select all your top 5 reasons you take vacations.)**





Destination Decision Making: When choosing travel destinations, Chinese LGBTs were mostly influenced by same-sex partners and LGBT friends, which means reaching out to the LGBT community and utilizing LGBT-friendly social media will be an effective way to influence their decision making.



**Who influences you the most in your choice of destinations when you travel?
(Choose only one)**

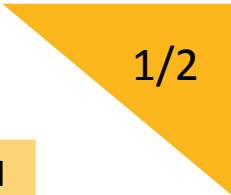
	International Travelers	Non-International Travelers
My same-sex partner	52%	46%
My LGBT friends	13%	12%
My coworkers/classmates	10%	10%
My straight friends	8%	8%
My parents	6%	10%
My expended family	2%	2%
My brothers or sisters	0%	1%
Other	8%	10%



International Destination Attributes: “Safety and security” is the most important attribute when selecting an international travel destination. Though more and more countries have simplified the visa application process in the past few years, it still remains challenging for Chinese LGBTs to get visas to Western countries. LGBT-friendliness is one of the top attributes for both international and non-international travelers.



Which of the following attributes are most important to you in your desire to vacation outside of China? (Please check all that apply)



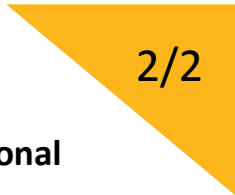
Top Attributes	International Travelers	Non-International Travelers
Safety and security	68%	68%
Convenient visa application process	59%	59%
A sense of relaxation, a place to unwind, and get re-energized	49%	48%
Friendly local people	42%	40%
An LGBT-friendly destination	41%	44%
Clean environment	41%	41%



International Destination Attributes: Though LGBT-friendliness is an important attribute, Chinese LGBTs are not necessarily looking for specific LGBT-related infrastructures. LGBT bars and nightlife and a large LGBT local destination scored low.



Which of the following attributes are most important to you in your desire to vacation outside of China? (Please check all that apply)



	International Travelers	Non-International Travelers
Many historic and cultural things to do and see	37%	33%
Quality culinary and dining experiences	37%	31%
Unique scenery unlike anywhere else	36%	31%
A variety of unique experiences and activities	35%	34%
A romantic destination	33%	26%
Direct flights to the destination from China	32%	29%
LGBT bars and nightlife	22%	18%
Access to Chinese language assistance at hotel and attractions	22%	27%
Favorable currency exchange rates	19%	18%
A large LGBT local destination	13%	12%
A good place for family and children	2%	2%



International Destination Attractions and Activities: Food/cuisine, national parks and nature sightseeing, historical sites and unique landmarks, and beaches were the most important attractions for Chinese LGBTs. LGBT events were also attractive since it was checked by 1/3 of the respondents. Chinese LGBTs were more experience-based travelers; few of them were interested in high-end shopping at destinations.



If you were to travel internationally outside of China, how important is it to you that the destination has the follow attractions and activities? (Check all that are most important to you)

	International Travelers	Non-International Travelers
Interesting food/cuisine	71%	64%
National parks and other natural sightseeing	53%	54%
Historical sites and unique landmarks	51%	49%
Beaches	49%	39%
Arts/culture activities (museums, art galleries, festivals, etc.)	44%	42%
LGBT events like Pride or Film Festivals	33%	33%
Water sport activities (snorkeling, swimming, surfing, etc.)	33%	22%
Vibrant nightlife	28%	23%
Local-made unique products to buy	26%	31%
LGBT neighborhood	22%	24%
Outdoor activities (hiking, biking, etc.)	19%	19%
Guided tours or travel groups in Chinese language	12%	19%
Luxury / Designer brand (high-end) shopping	11%	3%
Golf	0%	0%

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Last Trip to Any International Destination

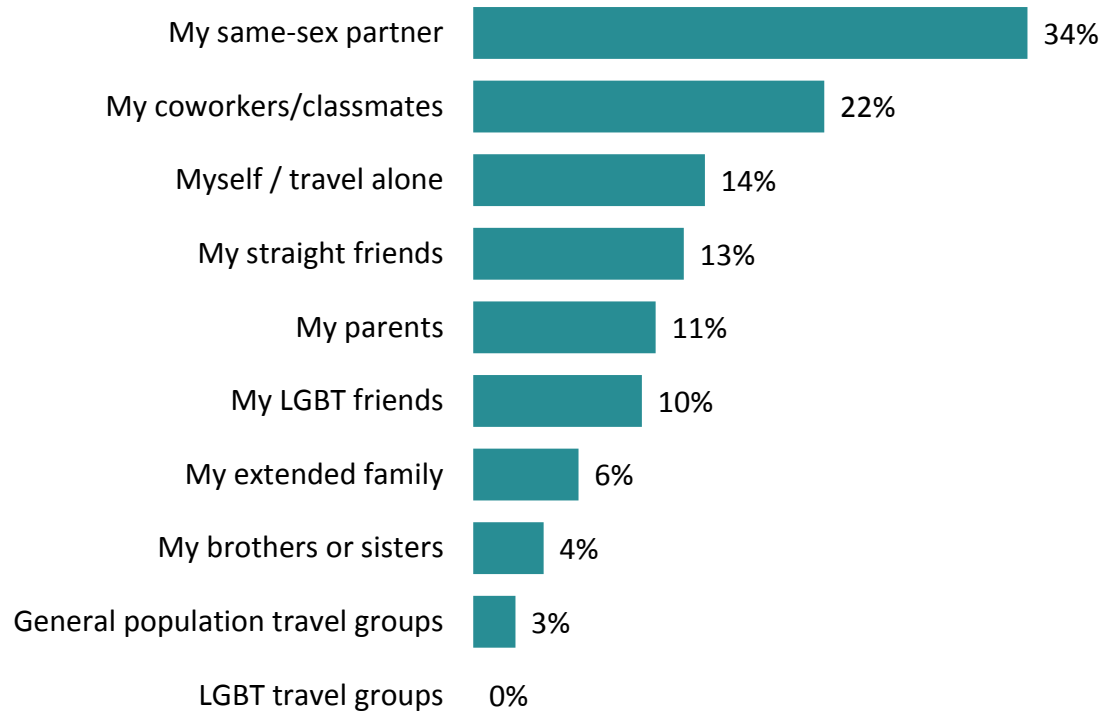




International Travel Companions: When traveling internationally, Chinese LGBTs travel with a variety of companions. 34% traveled with a same-sex partner during the last vacation overseas. They are more likely to travel in small groups of friends and family, than in organized groups. Of the 232 international travelers, only 3% traveled with general population travel groups and none traveled with LGBT travel groups during their last trip.



On your last vacation where you traveled by airplane overseas, who did you travel with? (Please select all that apply)



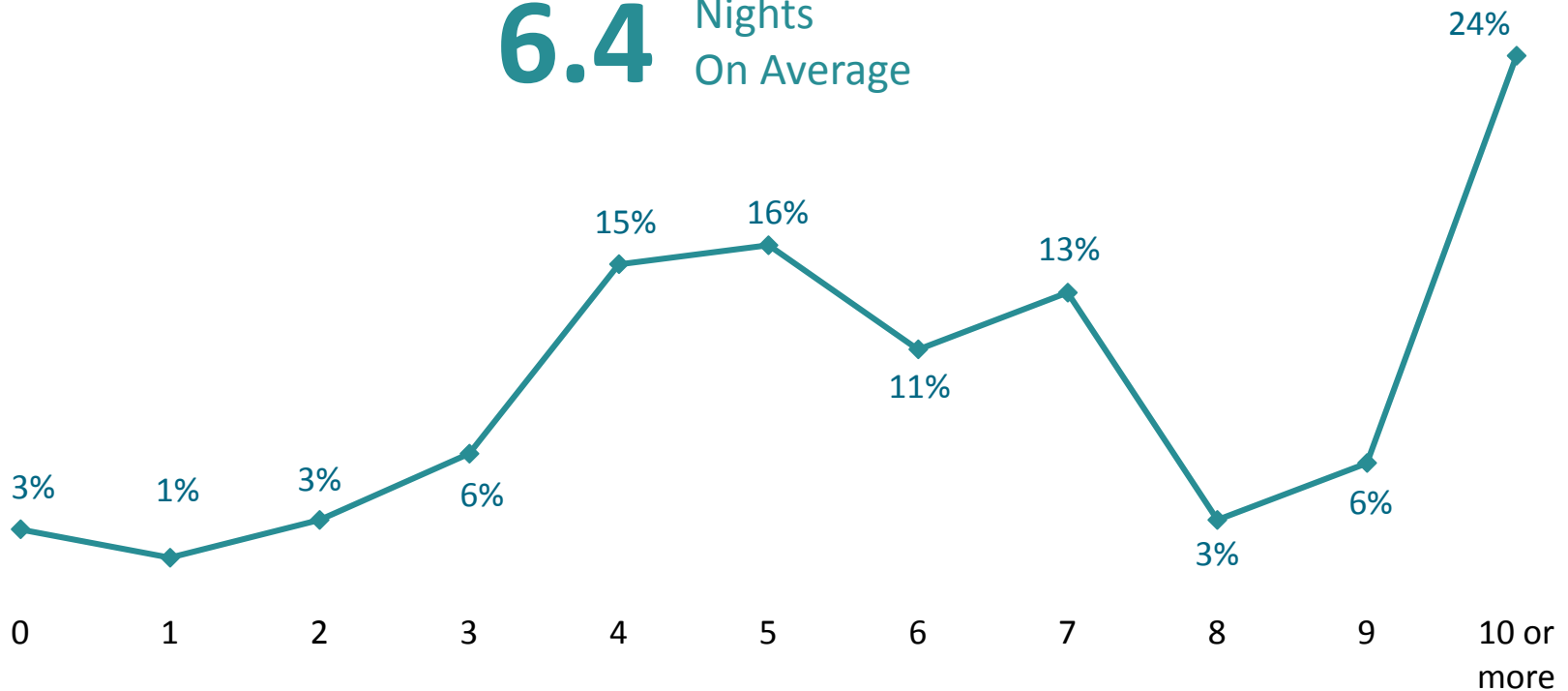


Vacation History Outside Mainland China: Chinese LGBTs spent an average of 6.4 nights during their last international vacation. 55% spent between 4 to 7 nights while 24% spent 10 or more nights for the trip.



Think back to last time you took an international vacation, or visited Hong Kong, Macao or Taiwan. This next set of questions is about just that last trip. How many nights did you spend during the above trip?

6.4 Nights On Average





Prepaid Package for Last International Vacation: 26% of the respondents said their trip was part of a pre-paid, inclusive tour package. Airfare was included in all the pre-paid packages and accommodations were included in most.

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

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

26%

Yes

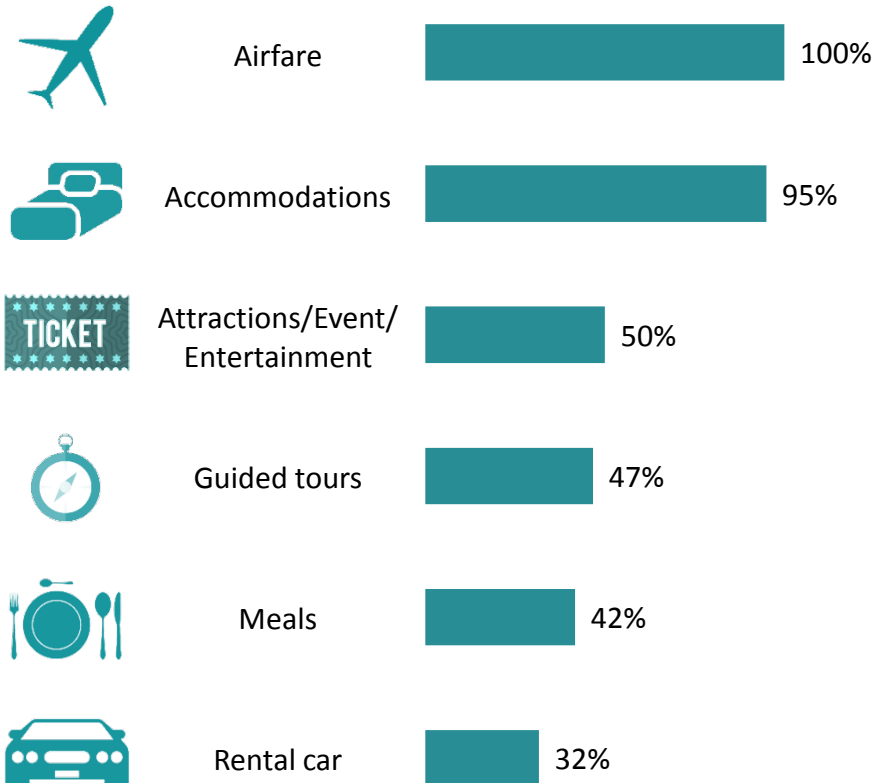


60%

No

13% Not Sure

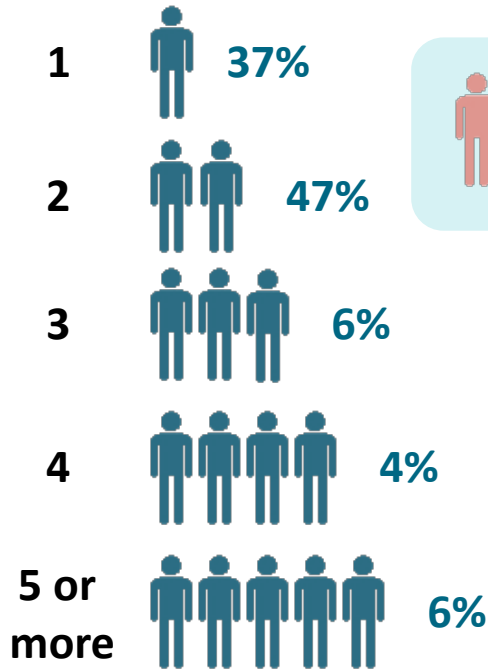
**Which of the following was included in that package?
(Please mark all that apply.)**





Number of People and Average Spending for Last International Vacation: 84% of Chinese LGBTs traveled in a party of no more than 2 people during the last international vacation. On average, 2.0 people were on that trip. For spending, the average prepaid package cost 8,815 RMB per person and the total spending for the trip was 25,387 RMB per person.

of People on Trip



2.0 people on average

Total Average Spending (Per Person)

Prepaid Package **8,815 RMB**

Total Spending **25,387 RMB**

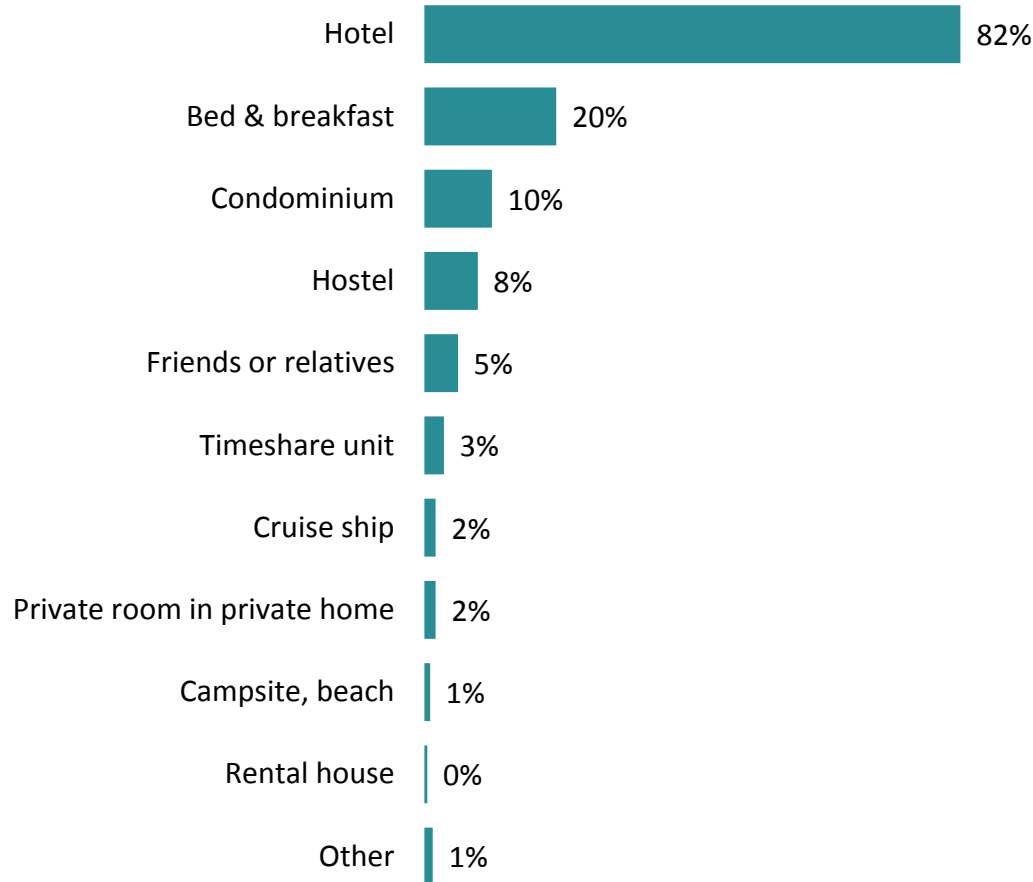




Accommodation for Last International Vacation: Most LGBTs prefer traditional hotel accommodations.



In which type of accommodation did you stay? (Please select all that apply)



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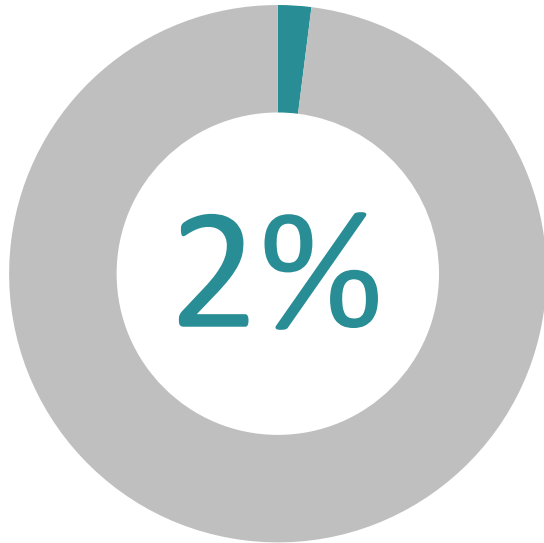
Section 7
LGBT Hawai'i
Travel





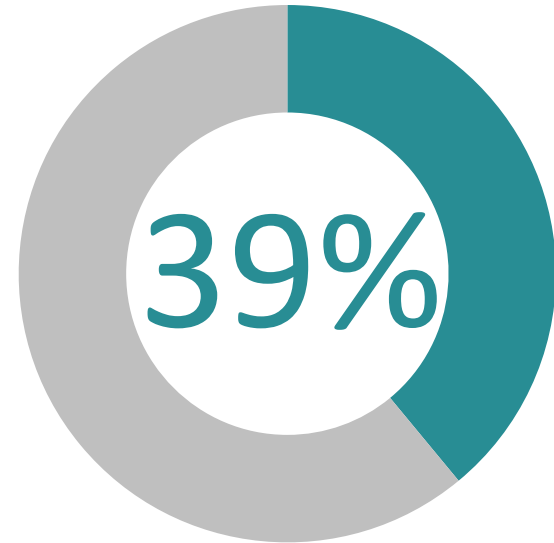
Hawaii Visitation: Only 2% of the Chinese LGBT participants surveyed have ever visited Hawaii during their lifetime but 39% of them said they had a Chinese friend or family member who had visited Hawaii.

Have you ever visited Hawaii, USA in your lifetime?



Yes

Have you ever had a Chinese friend or family member who had visited Hawaii, USA?



Yes



Reasons for not Visiting Hawaii: Not enough time to travel, financial reasons/travel costs, and difficult to obtain a US visa were the top reasons that Chinese LGBTs didn't visit Hawaii.



Why have you not visited Hawaii? (Please mark all that apply)

1/2

	International Travelers	Non-International Travelers
Not enough time to travel	47%	42%
Financial reasons/travel costs	37%	64%
Difficult to obtain a US visa	35%	28%
Better value at another destination	28%	11%
Hawaii is not a popular destination among my social circle	23%	10%
Flight to Hawaii is too long	21%	7%
Not familiar with what there is to see and do in Hawaii	21%	12%
Not familiar with the culture/lifestyle there	13%	8%



Reasons for not Visiting Hawaii: Continued from last page.



Why have you not visited Hawaii? (Please mark all that apply)



	International Travelers	Non-International Travelers
Prefer other island destinations in Asia pacific	9%	0%
Not sure which island(s) In Hawaii to visit	8%	3%
Prefer destinations closer to home	7%	8%
Prefer destinations on Continental US	6%	0%
People do not speak my language in Hawaii	5%	5%
Not enough LGBT-dedicated activities	4%	3%
Safety concerns in Hawaii	3%	6%
Hawaii is not an LGBT friendly destination	2%	1%
Have young children at home and cannot travel long distances	0%	0%
Not recommended by family or friends	0%	1%
None of the above	4%	12%



Hawaii Attributes: The great beaches, safety and security, a sense of relaxation, dining experiences and the romance of Hawaii are the most appealing attributes to attract Chinese LGBTs in the future. Selected by 36% of international travelers and 32% of non-international travelers, “Hawaii is LGBT-friendly” is also appealing. However, since only 20% of respondents (both international and non-international travelers) rated Hawaii as a safe and popular destination for LGBTs, there is more work to be done to improve Hawaii’s LGBT-friendly perception.



Which if these reasons might motivate you to visit Hawaii in the future? Which are most appealing to you? (Check all that apply)

1/2

	International Travelers	Non-International Travelers
Hawaii offers great beaches	50%	45%
Hawaii is a safe and secure place	41%	36%
Hawaii provides a sense of relaxation, a place to unwind	40%	38%
Hawaii offers quality culinary and dining experiences	39%	28%
Hawaii is romantic	39%	36%
Hawaii offers quality hotel experiences	38%	24%
Hawaii offers fun water / ocean activities	36%	27%
Hawaii is LGBT-friendly	36%	32%



Reasons for not Visiting Hawaii: Continued from previous page.



Which if these reasons might motivate you to visit Hawaii in the future? Which are most appealing to you? (Check all that apply)

2/2

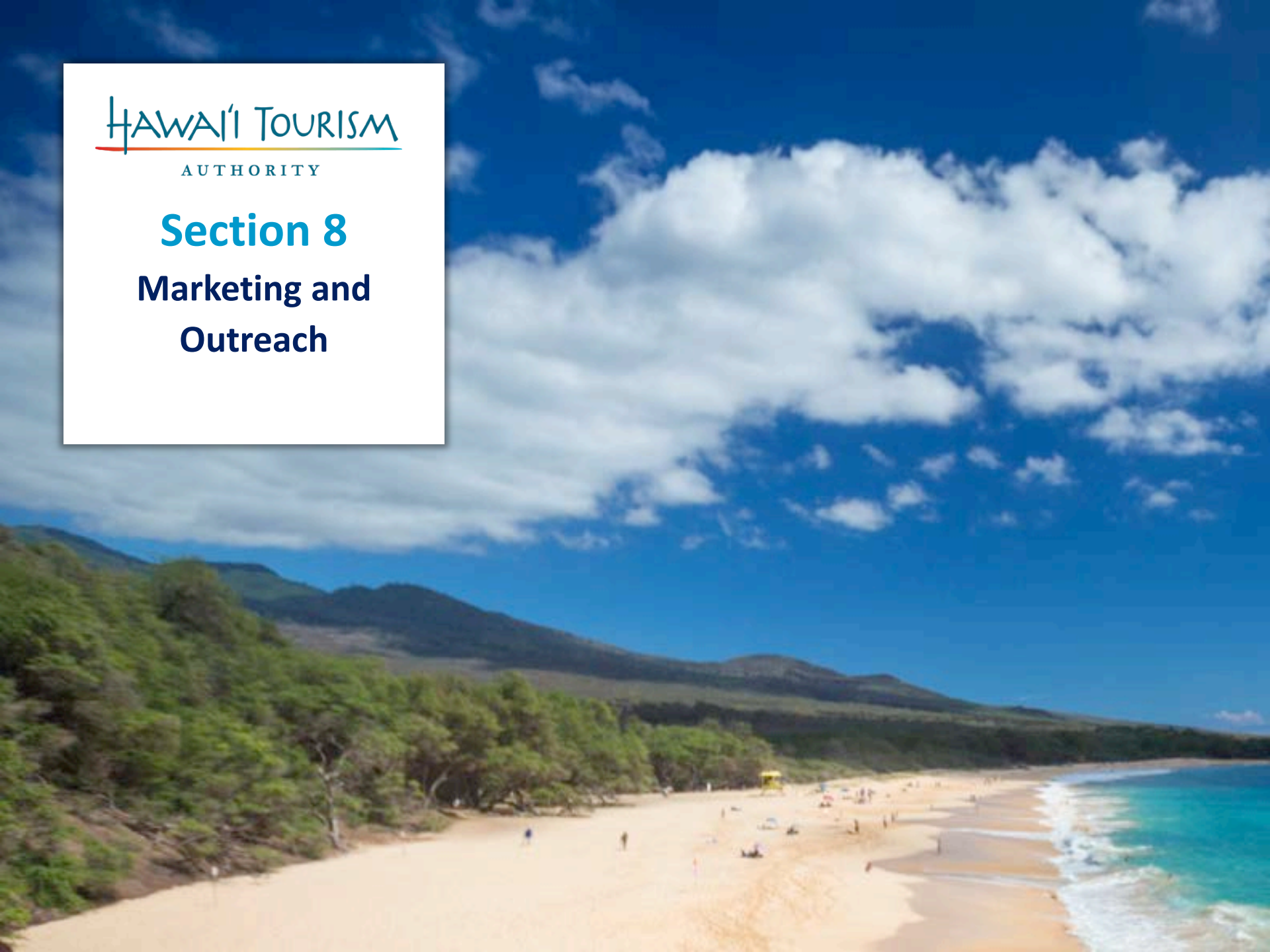
	International Travelers	Non-International Travelers
Hawaii has unique scenery unlike anywhere else	35%	30%
Hawaii has a variety of unique experiences and activities	35%	28%
The local people are friendly in Hawaii	30%	25%
The environment in Hawaii is clean	26%	26%
It's easy to meet other LGBT people in Hawaii	20%	22%
There are many historic and cultural things to do and see in Hawaii	16%	22%
Hawaii has good shopping experiences	16%	7%
Hawaii is a good place for family and children	5%	1%
None of the above	5%	11%

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Section 8

Marketing and Outreach





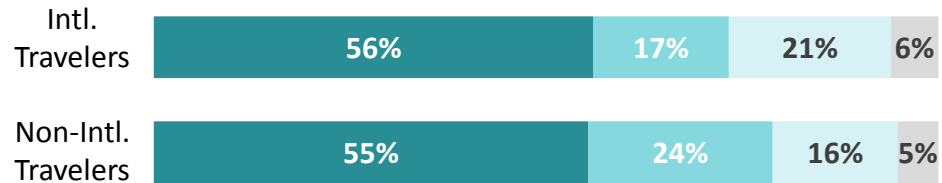
Media Planning Chart



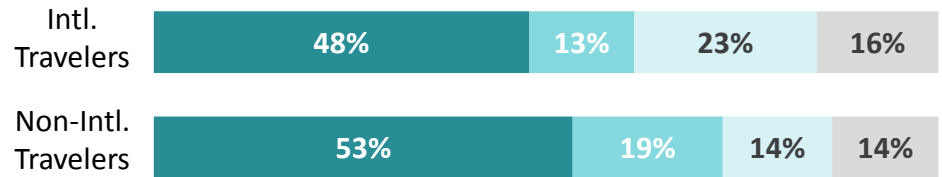
How often do you.....

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

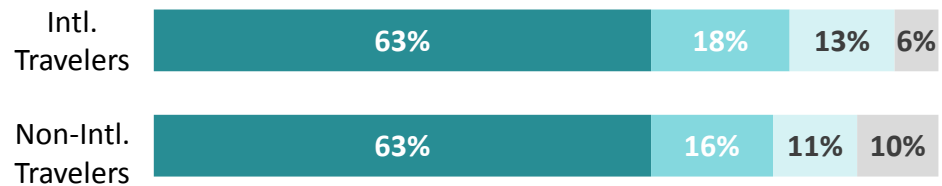
View LGBT-specific websites, either news or entertainment



Use same-sex dating mobile apps



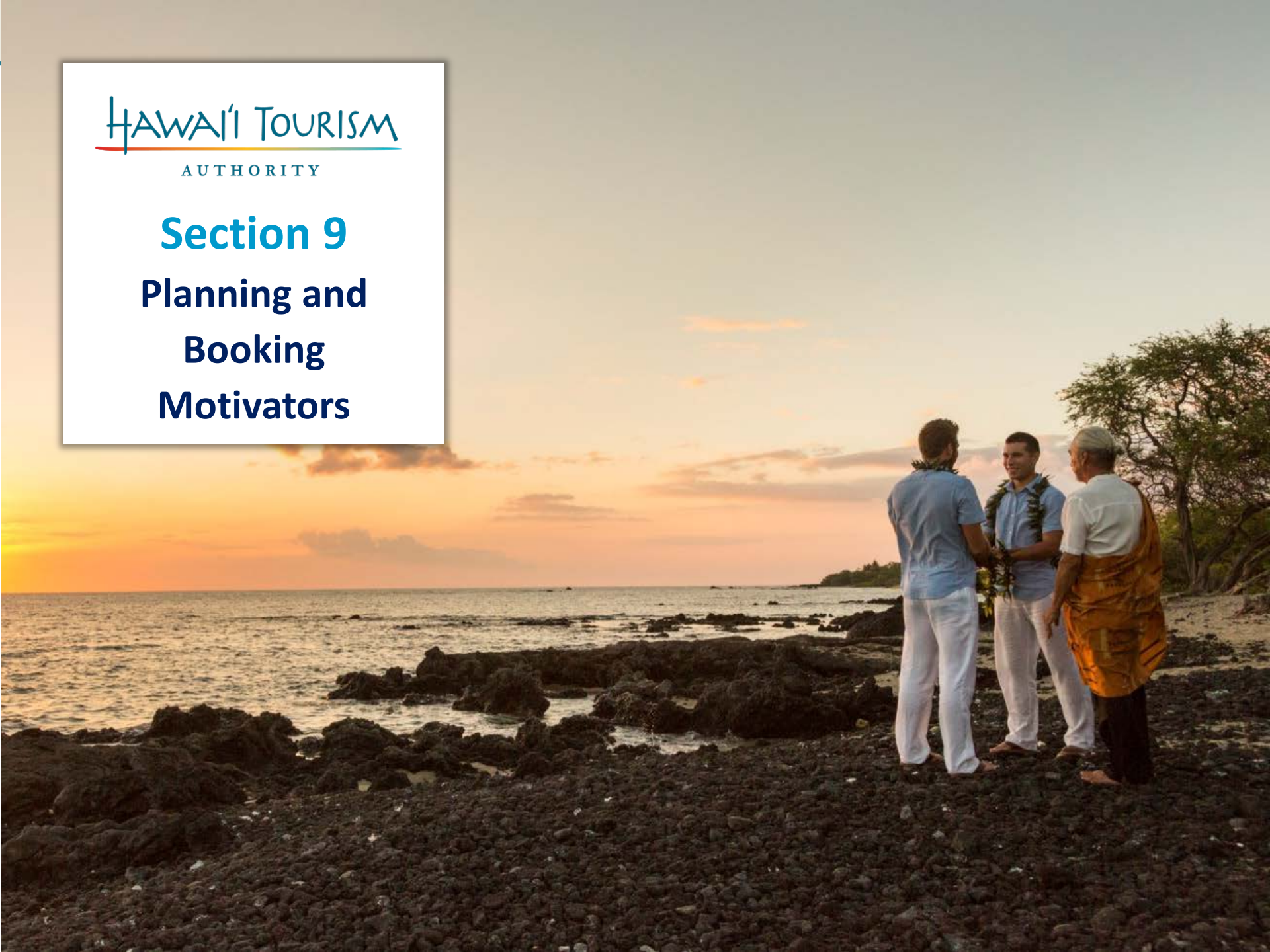
Read articles from LGBT-specific WeChat public accounts



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Section 9
Planning and
Booking
Motivators





Travel Planning Chart: Inspiration or motivation



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

	International Travelers	Non-International Travelers
Social media (e.g., WeChat, Sina Weibo)	65%	53%
Recommendations from friends or relatives	50%	51%
Online travel community websites/travel apps (Qiongyou, Mafengwo)	42%	28%
Online booking sites (e.g., Ctrip, Qunar) / mobile app	37%	27%
Mainstream travel websites or blogs	29%	22%
Travel guide books (e.g., Fodors, Frommers)	28%	19%
Adventure/outdoor/travel magazines	21%	17%
Airline website/mobile app	18%	7%
LGBT websites or blogs	15%	15%
Destination website	13%	15%
Hotel website / mobile app	13%	9%
Travel agent	11%	6%
Television/Radio	11%	15%
LGBT magazines	7%	10%
None of the above	4%	7%



Travel Planning Chart: Planning and booking



Do you use any of the following for travel planning and booking to any destination? (Check all that apply)

	International Travelers	Non-International Travelers
Online booking sites (e.g., Ctrip, Qunar) / mobile app	66%	51%
Online travel community websites/travel apps (Qiongyou, Mafengwo)	55%	32%
Social media (e.g., WeChat, Sina Weibo)	44%	45%
Recommendations from friends or relatives	29%	38%
Airline website/mobile app	25%	10%
Hotel website / mobile app	25%	17%
Mainstream travel websites or blogs	24%	22%
Travel guide books (e.g., Fodors, Frommers)	23%	11%
Destination website	22%	18%
Travel agent	16%	11%
Adventure/outdoor/travel magazines	12%	12%
LGBT websites or blogs	9%	10%
LGBT magazines	7%	5%
Television/Radio	3%	6%
None of the above	1%	7%



Mahalo...

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