DESTINATION NEXT

Multi-User Diagnostic Assessment: Hawaii Statewide

December 30, 2019

MMGY NextFactor

DestinationNEXT Program

DestinationNEXT

DestinationNEXT is a global research platform, online diagnostic tool, and strategic action plan designed to help destination organizations define their priorities and increase their effectiveness.

This was developed through a partnership led by Paul Ouimet to provide a data-driven methodology for helping destination organizations increase their overall value in their communities.

DestinationNEXT is comprised of two parts:

1. Futures Study – Identifies the major leisure and business travel trends worldwide; and

2. Destination Assessment Tool & Scenario Model – Provides a framework for measuring destination strength and community support/engagement

Futures Study

The DestinationNEXT Futures Study surveyed 433 destination organizations in 52 countries to produce an empirical ranking of 75 trends and 55 strategies influencing how destinations operate and engage the modern traveler.

Together, trends and strategies represent the most comprehensive overview and up-to-date perspective of the global travel and tourism industry.

MMGY NextFactor has an exclusive agreement with Destinations International to continually update DestinationNEXT and leverage its insights for the benefit of organizations leading their destinations into the future.

No other destination consultancy has such an in-depth and proven process for delivering actionable strategies in destination marketing, management, and development.

The complete Futures Study 2019 report is included in Appendix A.

Assessment Tool

The second part of DestinationNEXT is the Destination Assessment Tool and Scenario Model. The assessment tool has an objective methodology to measure the strength of the destination and the alignment of the community towards tourism based on 20 variables. This informs how the public and private sectors can collaborate more strategically to grow their visitor economy.

To date, MMGY NextFactor has facilitated more than 225 detailed destination assessments in 11 countries.

In order to ensure that a destination is analyzed from every angle, the survey is cast to various local industry groups that play either a vital or secondary role in tourism.

The voice of the community needs to be heard as well, which is why the survey is also cast to non-tourism community leaders.

And thirdly, an outside voice from those that buy services within the destination needs to be heard. Reaching out to the market leads to discoveries about the destination that might not be seen from within.

Destination Strength Variables

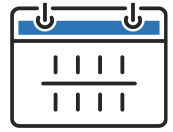
To measure the strength of a destination, we created 10 unique variables that make up what a destination needs to attract visitors. These variables contain several questions to determine how the destination is performing on each variable.

Brand

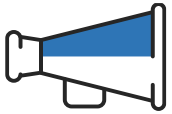
Accommodation

Attractions & Entertainment

Conventions & Meeting Facilities



Events



Sports & Recreation Facilities

Communication Infrastructure

Mobility & Access

Air Access

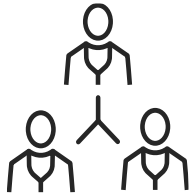
International Readiness

Community Alignment Variables

Similar to Destination Strength, 10 variables were created to measure how strong the alignment is within the community to ensure that tourism is seen as a vital economy.

Organization Governance Model

Partnership Strength



Industry Support

Local Community Support

Regional Cooperation

Workforce

Hospitality Culture

Policy & Regulatory Environment

Funding Support & Certainty

Economic Development

United States

* States shaded for state-wide assessment

Canada

* Provinces shaded for province-wide assessment

Latin America

Europe

Africa & Asia Pacific

Scenario Model

Every DestinationNEXT Assessment is determined by two success factors for a destination. First is how strong your destination is and second is how much community alignment there is within a destination.

When these two success factors intersect, four unique scenarios emerge that help prioritize where your strategies should align.

The following two pages show what the key strategic challenges are for destinations that find themselves in each quadrant, as well as destinations that have in the past taken the DestinationNEXT Assessment and plotted themselves within each quadrant.

Scenario Model – Key Strategic Challenges

Strong Community Alignment

Weak Destination

Strong Destination

Weak Community Alignment

VOYAGERS

- Maintaining momentum over time required to implement strategy
- Making prioritized choices for focused action; avoiding the temptation to be all things to all people
- Establishing destination marketplace credibility; delivering on brand promises for target market segments

TRAILBLAZERS

- Avoiding complacency
- Continuing to evolve the destination that delivers a compelling and authentic marketplace experience
- Keeping your eye on the ball

EXPLORERS

- Rallying the community to work together towards a realistic vision and strategy
- Building community recognition and acceptance that transformational change is needed
- Implementing the strategy with limited resources

MOUNTAINEERS

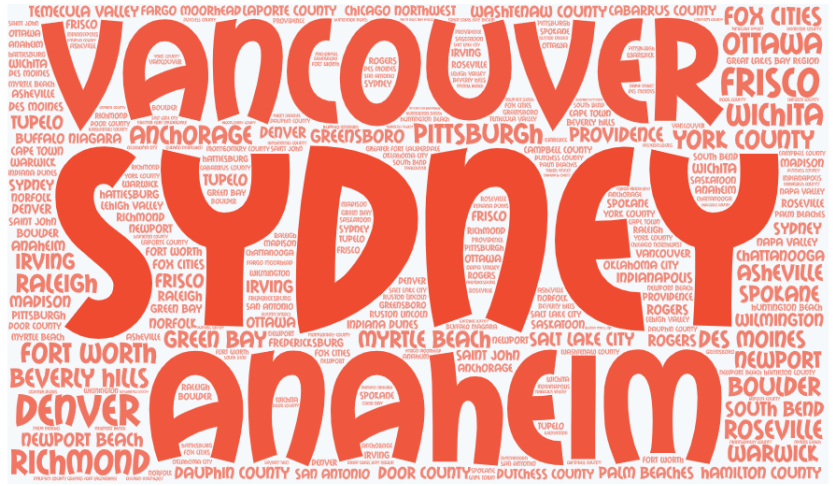
- Engaging the community before the destination experience to visitors is compromised along with the brand
- Maintaining and improving tourism infrastructure and service levels
- Raising the profile and appreciation of the tourism industry

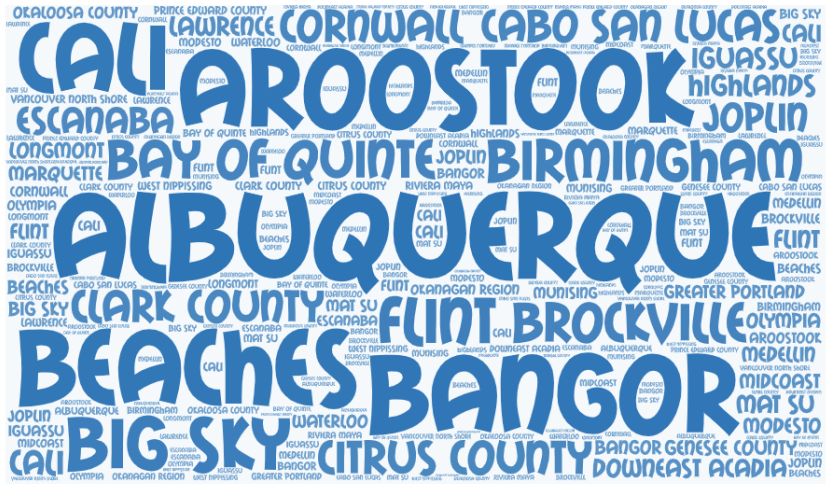
Scenario Model – Sample Destinations

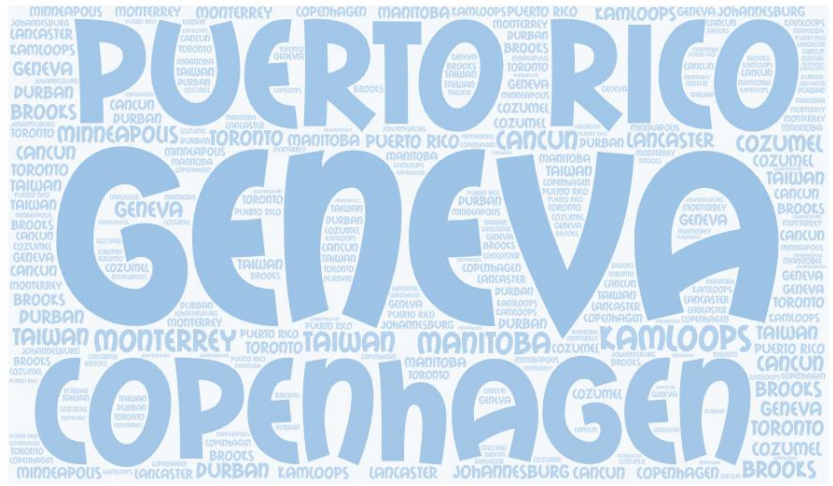
Strong Community Alignment

Weak Destination

Strong Destination







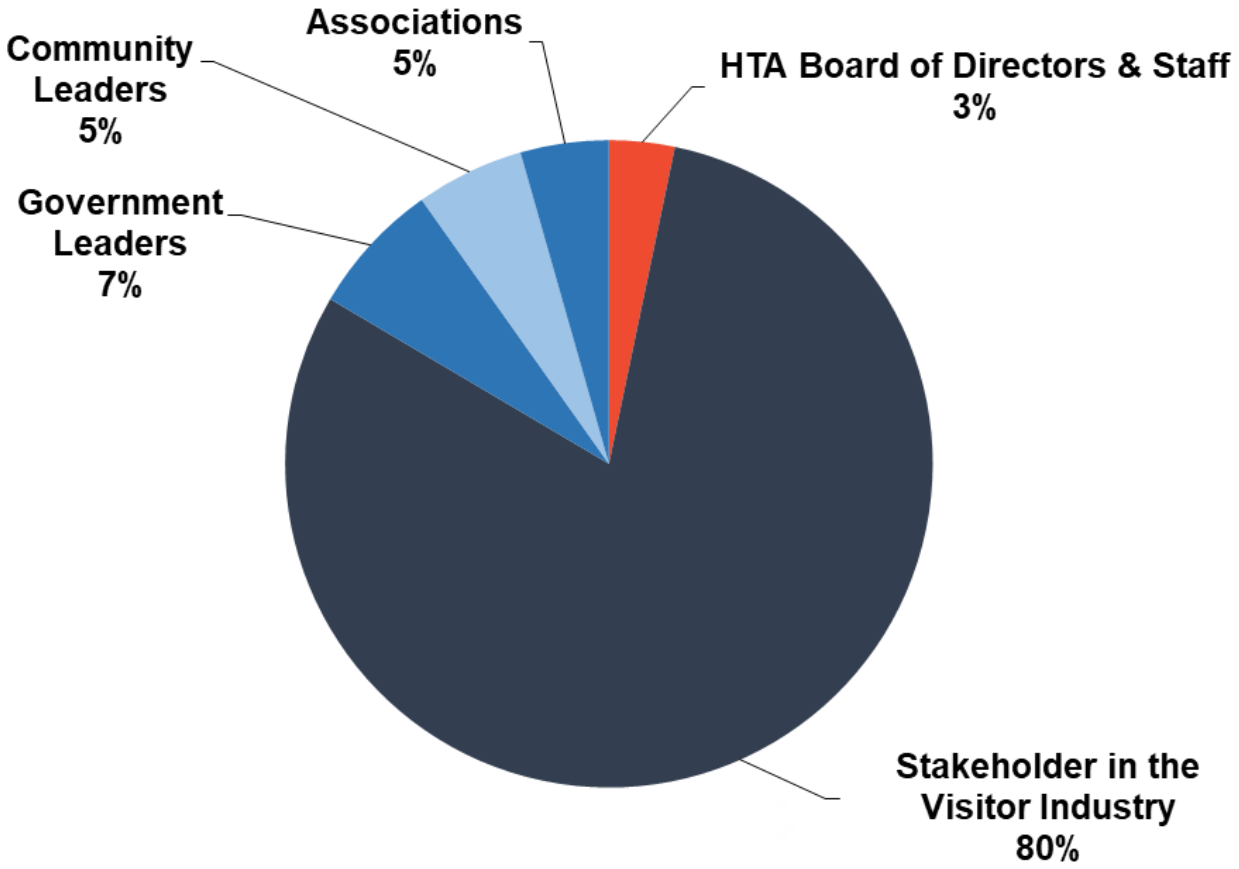
Weak Community Alignment

Hawaii Statewide DestinationNEXT Assessment Results

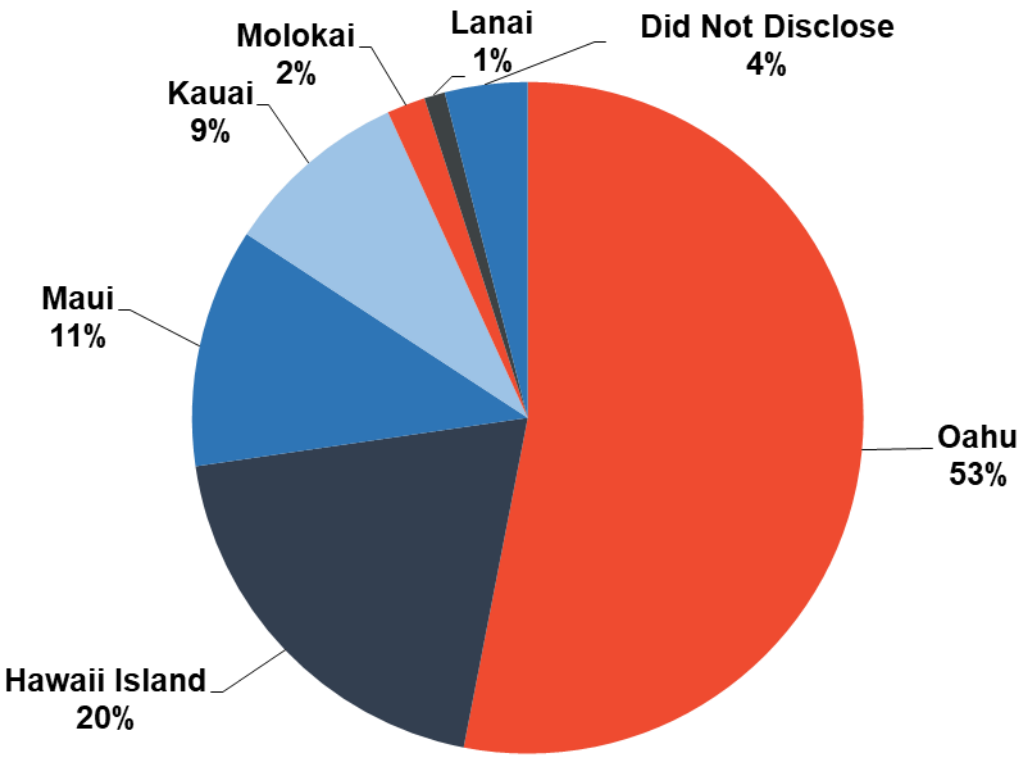
Demographic Breakdown of Responses

A total of 703 individuals responded to the survey, as broken down below.

Stakeholder



Island

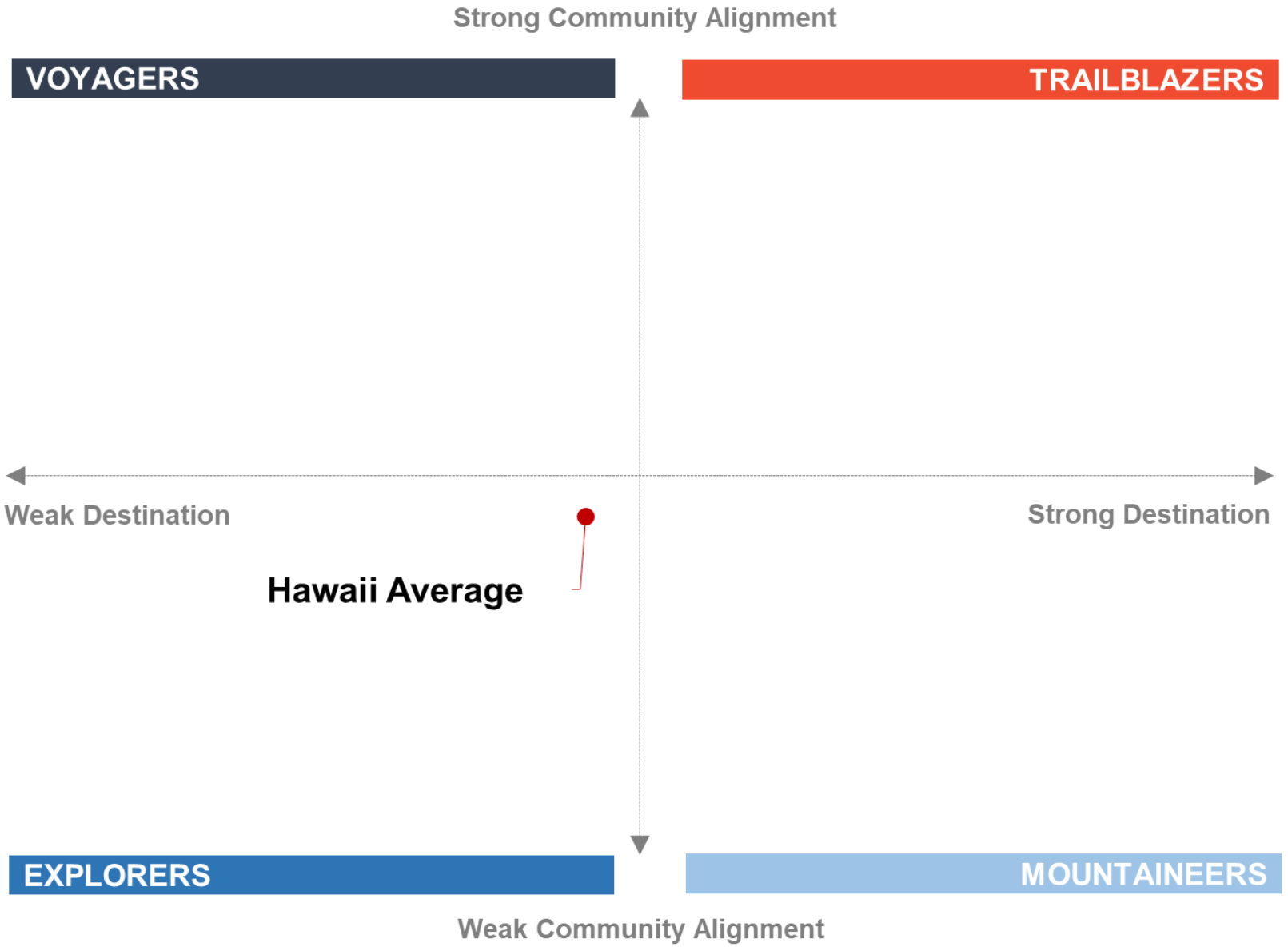


Overall Assessment

This plot shows how the overall statewide assessment for Hawaii plots against the industry average of 225 destinations from around the world as marked by the meeting point of the two axes.

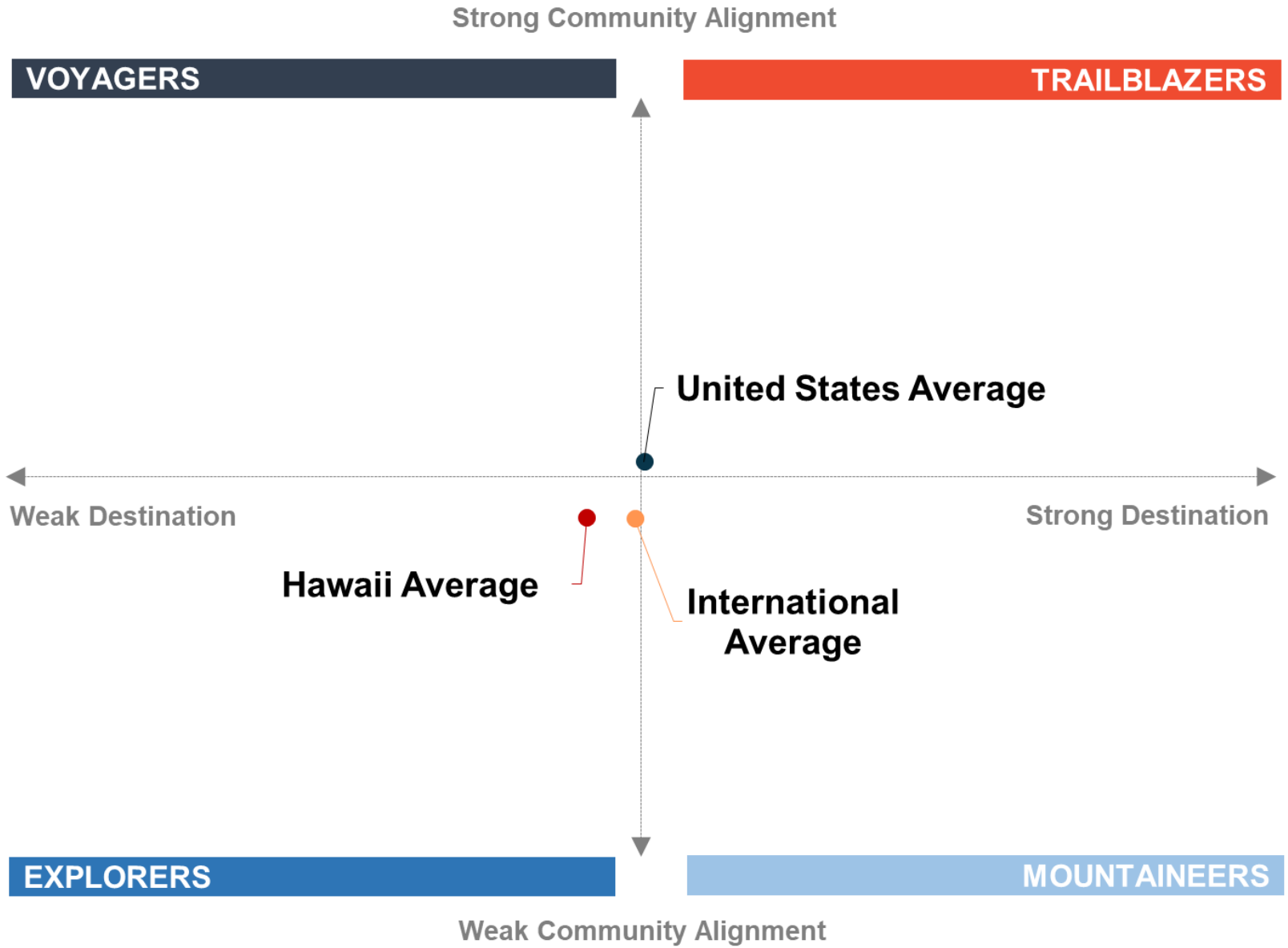
This average for Hawaii was derived from the overall averages for both Destination Strength and Community Alignment. These scores are taking into account the importance of the variable compared to the overall performance of the variable based on several key questions.

As marked, Hawaii has scored below average for both Destination Strength and Community Alignment.



Overall Assessment

This plot introduces the overall average for the United States and International destinations that have participated in the DestinationNEXT program. As we can see here, Hawaii is comparative to international destinations on the strength of community alignment while slightly weaker than other United States destinations.



Explorers

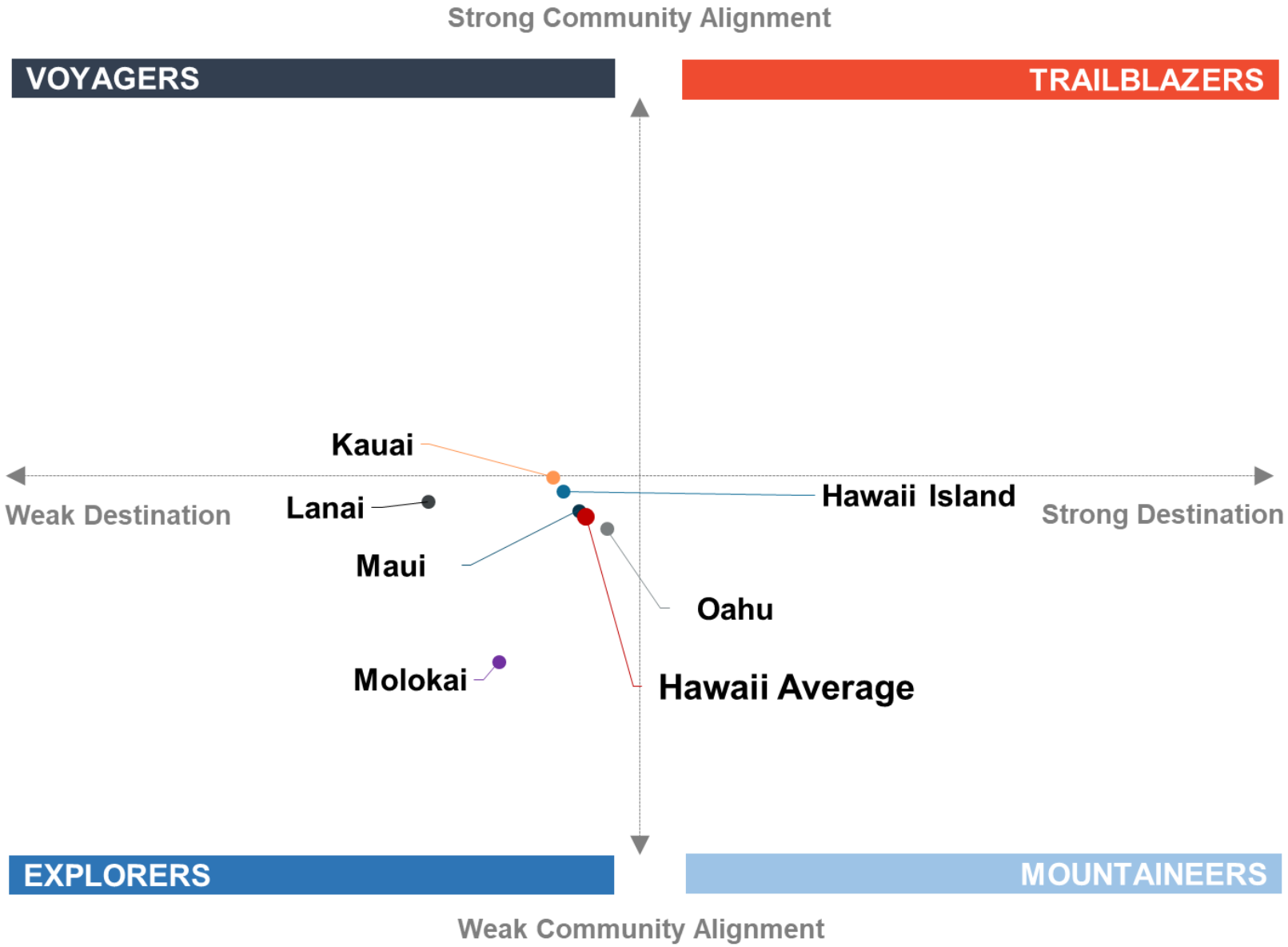
These Destination Organizations and destinations desire an inspired tourism vision and activated community to make it happen.

Key Strategic Challenges

- Rallying the community to work together towards a realistic vision and strategy
- Building community recognition and acceptance that transformational change is needed
- Implementing the strategy with limited resources

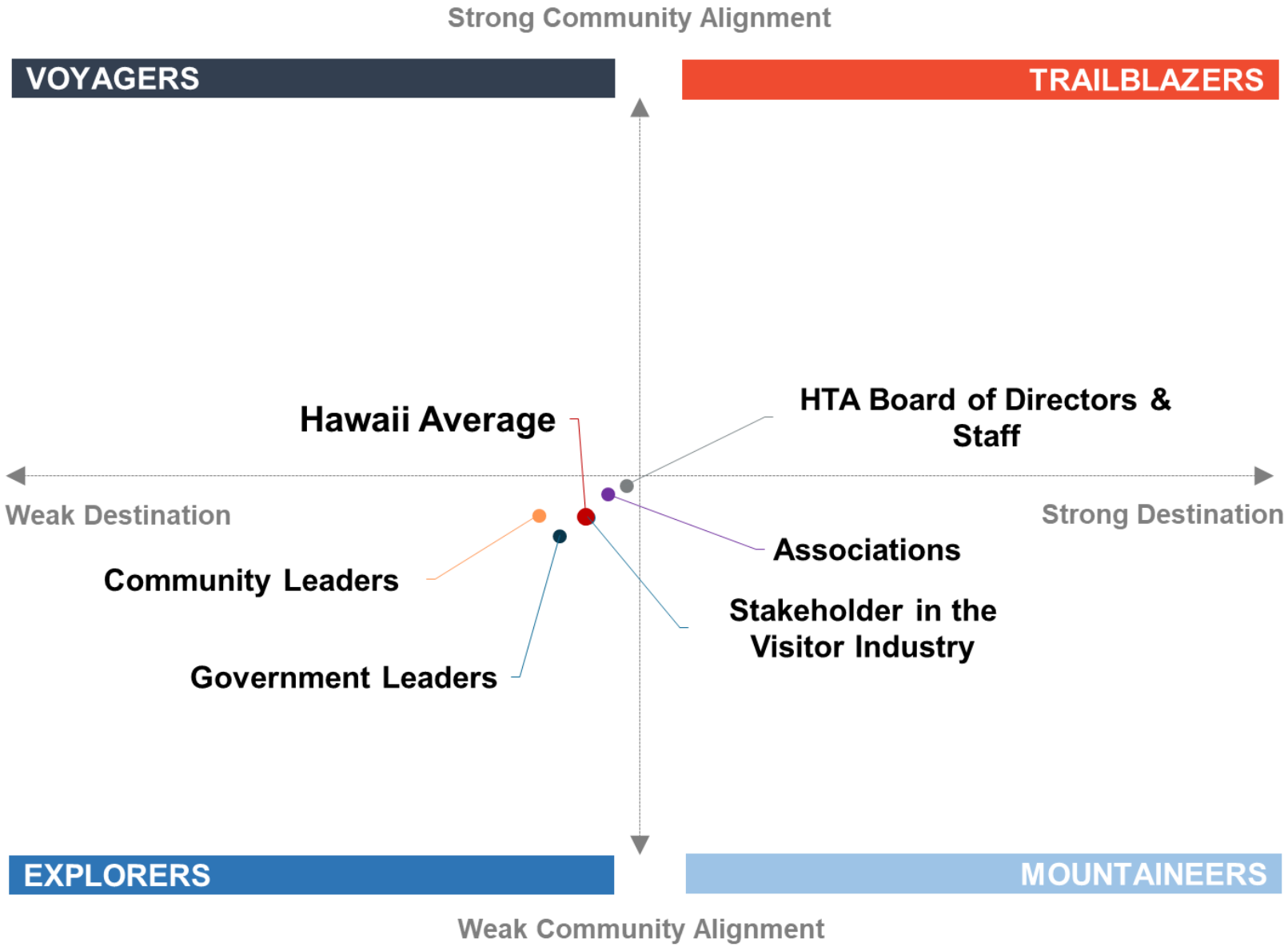
By Location

This plot shows how each Island plotted against the overall Hawaii statewide plot as well as the United States and International averages.



Stakeholder Groups

The stakeholder plot shows how each stakeholder group plotted against the overall statewide plot. This signifies whether or not the stakeholders are aligned in their perceptions of how the destination is performing.



DestinationNEXT Report Cards

The following pages show the variables that are within Destination Strength and Community Alignment.

- The rankings page shows the top four variables, as determined by their Relative Importance score, shown against their overall Perceived Performance ranking.
    - The Relative Importance scores are an average that signifies how important the variable is to attracting visitors to the destination
    - Perceived Performance scores are an average awarded by the participants of the survey to each variable based on their perceptions of how the destination is performing today.
- If a high importance variable has a low performance rank, it is generally advised to address those variables first as they are key variables to attracting visitors to the destination. This will also have the greatest impact on the overall DestinationNEXT score.
- The overall report card for the Destination Strength variables show the overall averages of each variable for the entire statewide assessment. If under the Perceived Performance column in which a box is highlighted either green, yellow, or red, this will signify that the variable is either outperforming or underperforming the industry average for that variable.
- The Location Report Card shows a breakout of each Island's variable average and how they compare to the overall statewide average as shown by the coloring of the average. A similar process is used for the Stakeholder Report Card.
- After the report cards, each page contains the average score for each question that was asked (see Appendix B) both at the overall statewide level and at the individual Island level.

Destination Strength Rankings

	Relative Importance	Perceived Performance
Attractions & Entertainment	1st	1st
Mobility & Access	2nd	10th
Air Access	3rd	7th
Events	4th	3rd

Destination Strength – Report Card

Variable	Relative Importance (0-100%)		Perceived Performance (1-5 scale)		
	Industry Average	Hawaii Average	Industry Average	Hawaii Average	Standard Deviation
Attractions & Entertainment	10.8%	10.9%	3.60	3.55	0.51
Mobility & Access	10.1%	10.7%	3.02	2.54	0.50
Air Access	9.1%	10.7%	3.10	3.07	0.64
Events	9.8%	10.4%	3.55	3.49	0.38
Accommodation	10.5%	10.3%	3.47	3.31	0.51
Communication & Internet Infrastructure	10.0%	10.2%	3.23	2.87	0.57
Convention & Meeting Facilities	9.8%	9.8%	3.07	3.52	0.34
Brand	10.4%	9.3%	3.46	3.44	0.45
Outdoor Recreation & Sports Facilities	9.5%	9.1%	3.19	3.10	0.41
International Readiness	10.0%	8.7%	3.13	3.00	0.55

DESTINATION STRENGTH - Hawaii	**3.19**
INDUSTRY AVERAGE DESTINATION STRENGTH	**3.36**

RESULTING SCENARIO	**EXPLORERS**

Note
Green signifies **overperforming** by greater than 0.2.
Yellow signifies **underperforming** by greater than 0.2 but less than 0.4.
Red signifies **underperforming** by greater than 0.4.

Destination Strength – Location Report Card

Variable	Perceived Performance (1-5 scale) Hawaii Average	Oahu	Hawaii Island	Maui	Kauai	Molokai	Lanai
Attractions & Entertainment	3.55	3.68	3.39	3.52	3.31	3.10	2.86
Mobility & Access	2.54	2.59	2.56	2.37	2.22	3.28	2.99
Air Access	3.07	3.24	2.85	2.95	2.89	2.88	1.48
Events	3.49	3.52	3.44	3.44	3.44	3.34	3.35
Accommodation	3.31	3.22	3.40	3.53	3.61	2.59	2.73
Communication & Internet Infrastructure	2.87	2.96	2.73	2.96	2.74	2.25	2.27
Convention & Meeting Facilities	3.52	3.52	3.52	3.52	3.52	3.52	3.52
Brand	3.44	3.41	3.40	3.71	3.56	2.77	2.95
Outdoor Recreation & Sports Facilities	3.10	3.13	3.09	3.01	3.07	3.13	2.81
International Readiness	3.00	3.29	2.77	2.63	2.45	2.19	2.10

DESTINATION STRENGTH - Hawaii	**3.19**
INDUSTRY AVERAGE DESTINATION STRENGTH	**3.36**

RESULTING SCENARIO	**EXPLORERS**

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Destination Strength – Stakeholder Report Card

Variable	Hawaii Average	Perceived Performance (1-5 scale) HTA Board of Directors & Staff	Stakeholder in the Visitor Industry	Government Leaders	Community Leaders	Associations
Attractions & Entertainment	3.55	3.69	3.57	3.34	3.35	3.67
Mobility & Access	2.54	2.65	2.53	2.60	2.58	2.47
Air Access	3.07	3.27	3.09	2.99	2.67	3.13
Events	3.49	3.60	3.49	3.42	3.44	3.52
Accommodation	3.31	3.47	3.31	3.13	3.24	3.52
Communication & Internet Infrastructure	2.87	2.84	2.88	2.90	2.65	2.93
Convention & Meeting Facilities	3.52	3.60	3.53	3.40	3.50	3.59
Brand	3.44	3.63	3.46	3.27	3.25	3.57
Outdoor Recreation & Sports Facilities	3.10	3.26	3.10	3.06	3.00	3.22
International Readiness	3.00	3.18	3.01	2.96	2.72	2.99
DESTINATION STRENGTH - Hawaii						**3.19**
INDUSTRY AVERAGE DESTINATION STRENGTH						**3.36**
RESULTING SCENARIO						**EXPLORERS**

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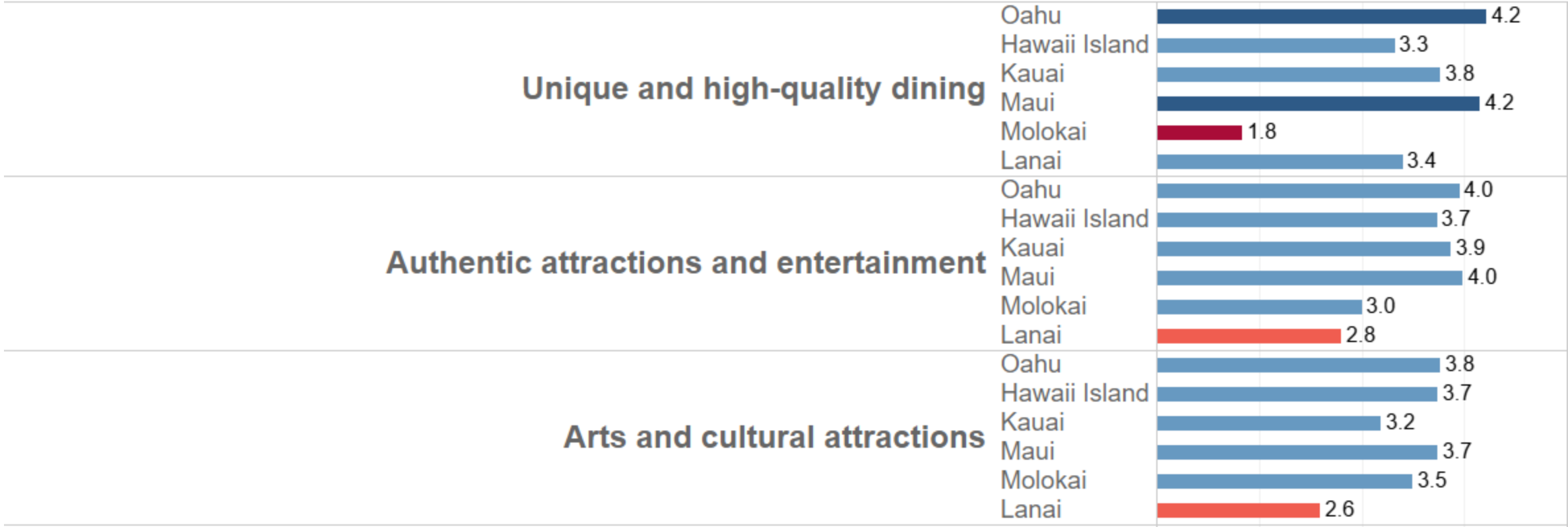
Attractions & Entertainment

Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Attractions & Entertainment by Location



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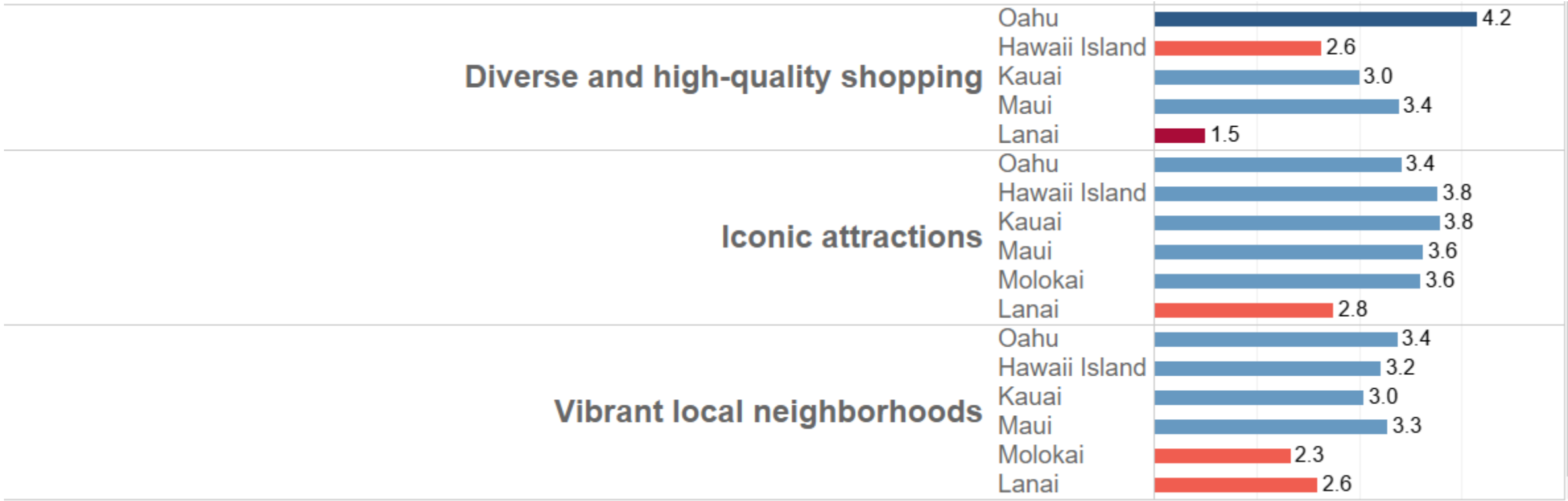

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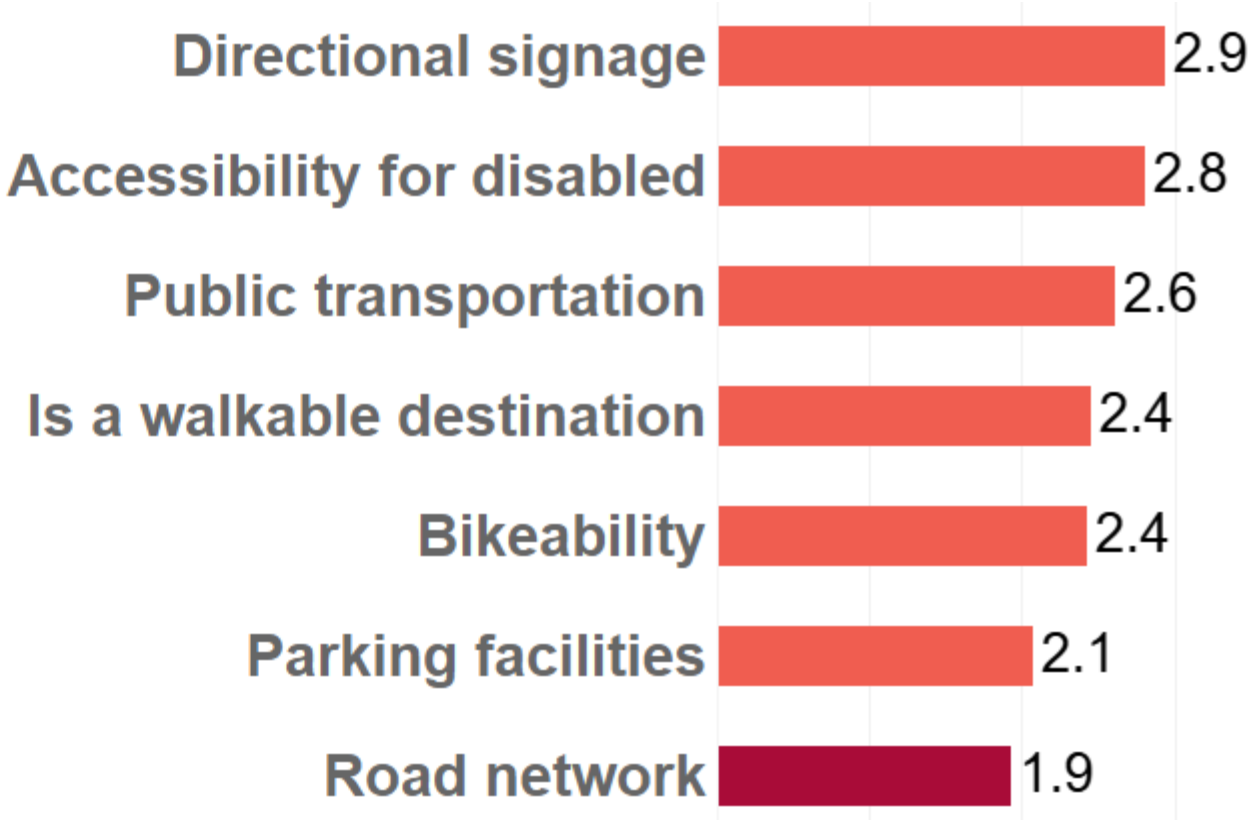
Mobility & Access



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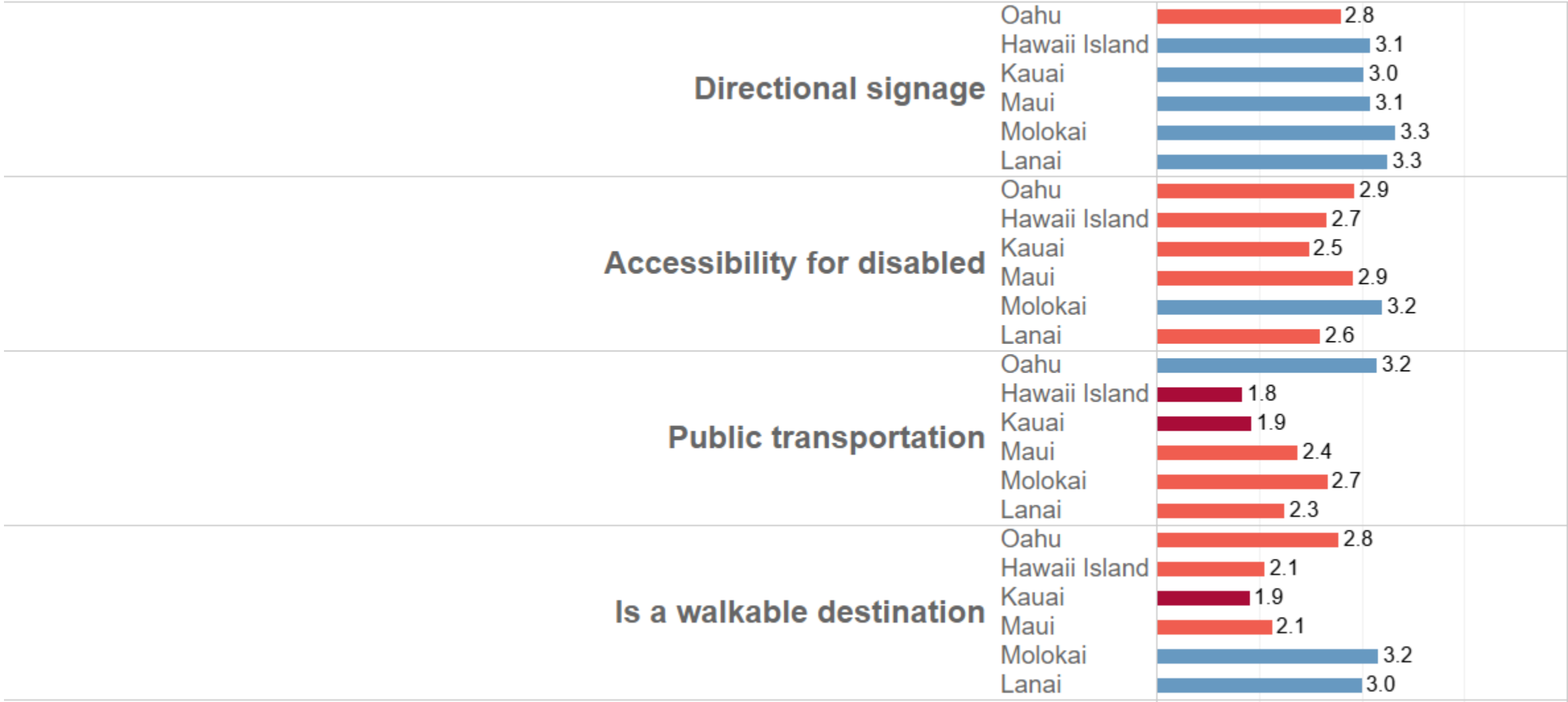
Mobility & Access by Location



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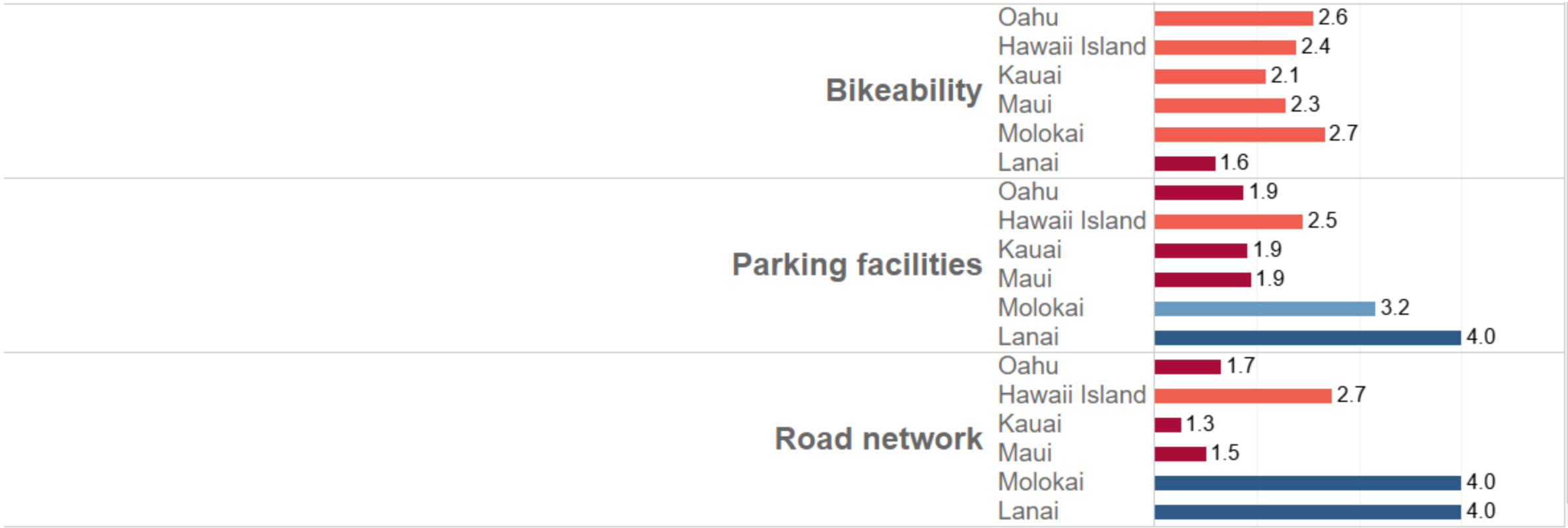
Mobility & Access by Location



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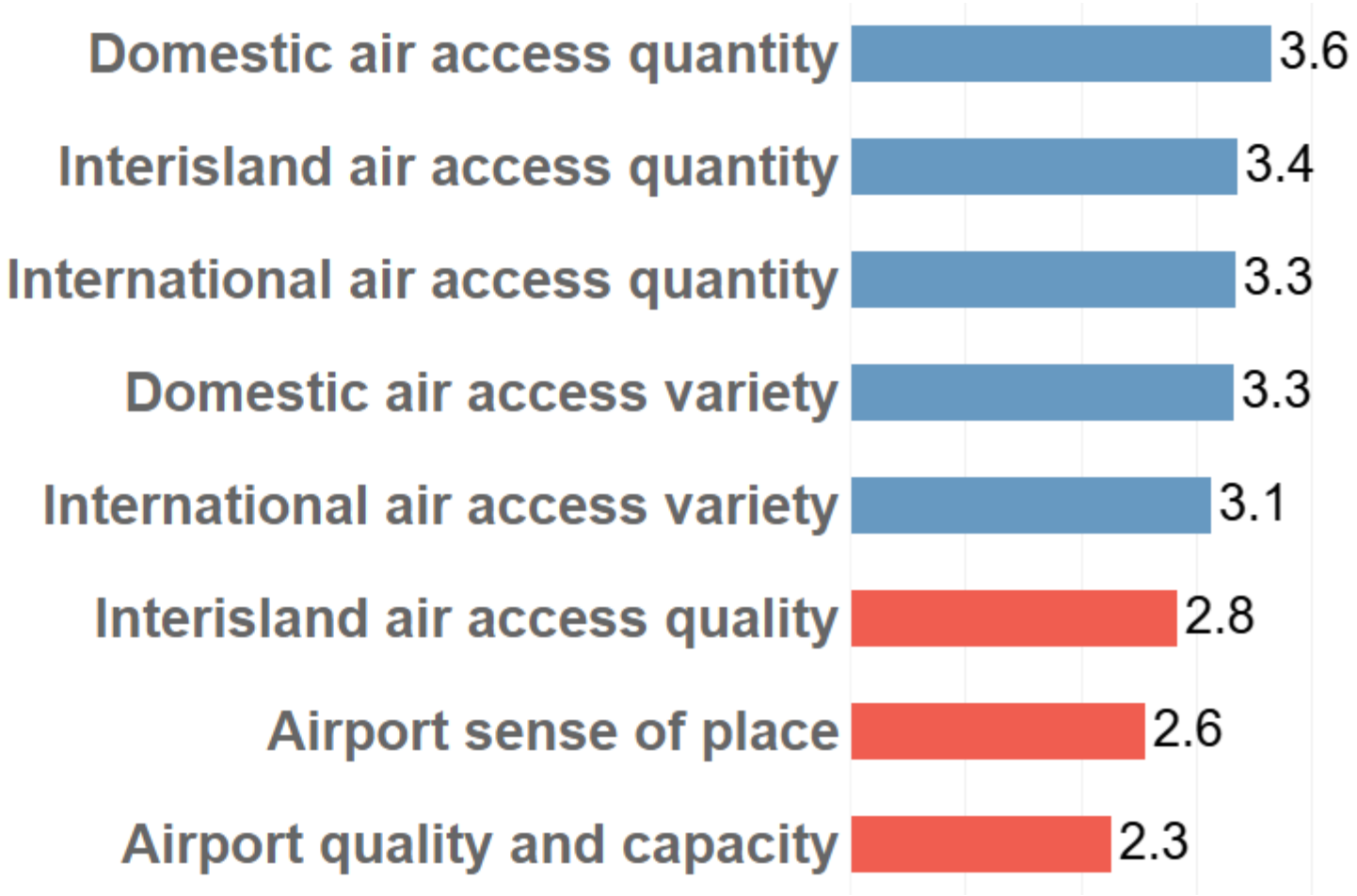
Air Access



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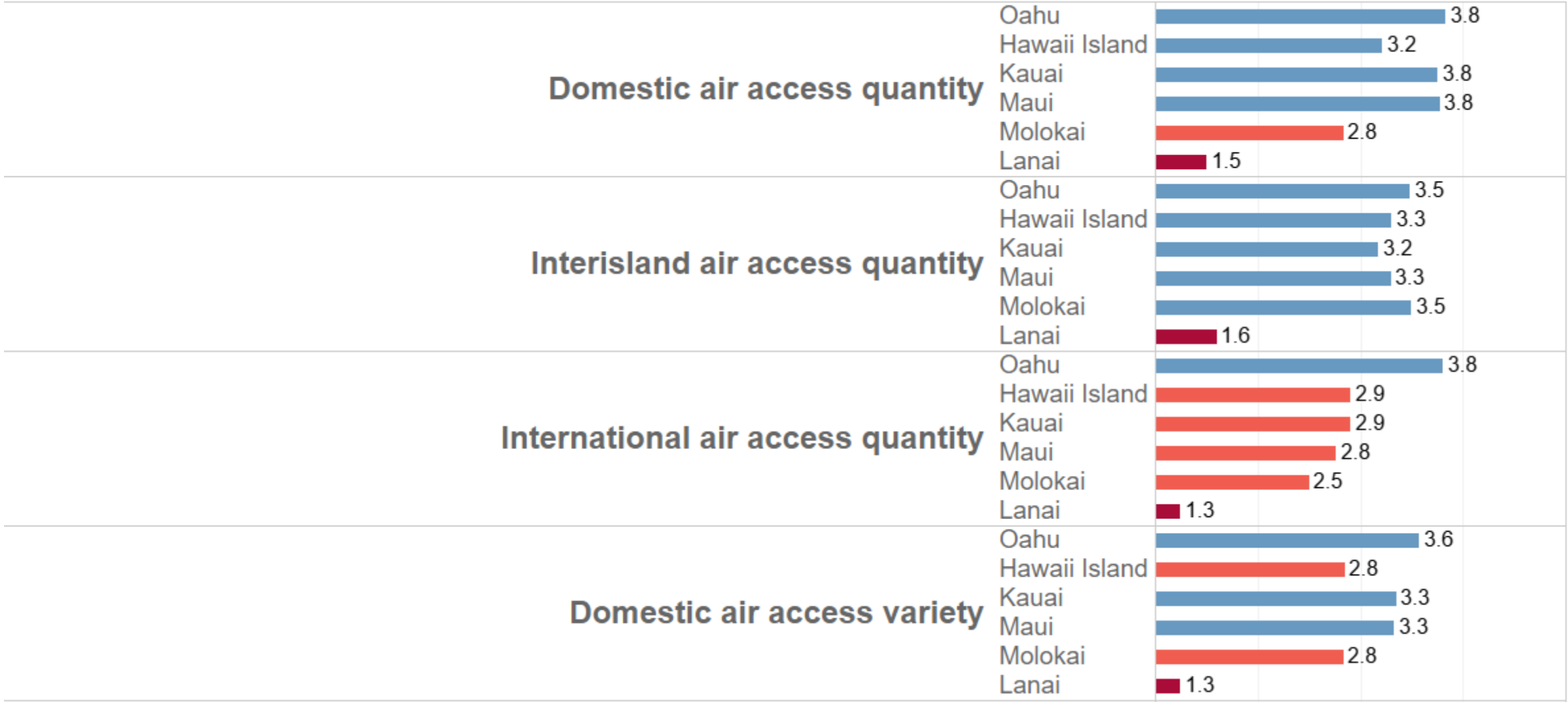
Air Access by Location



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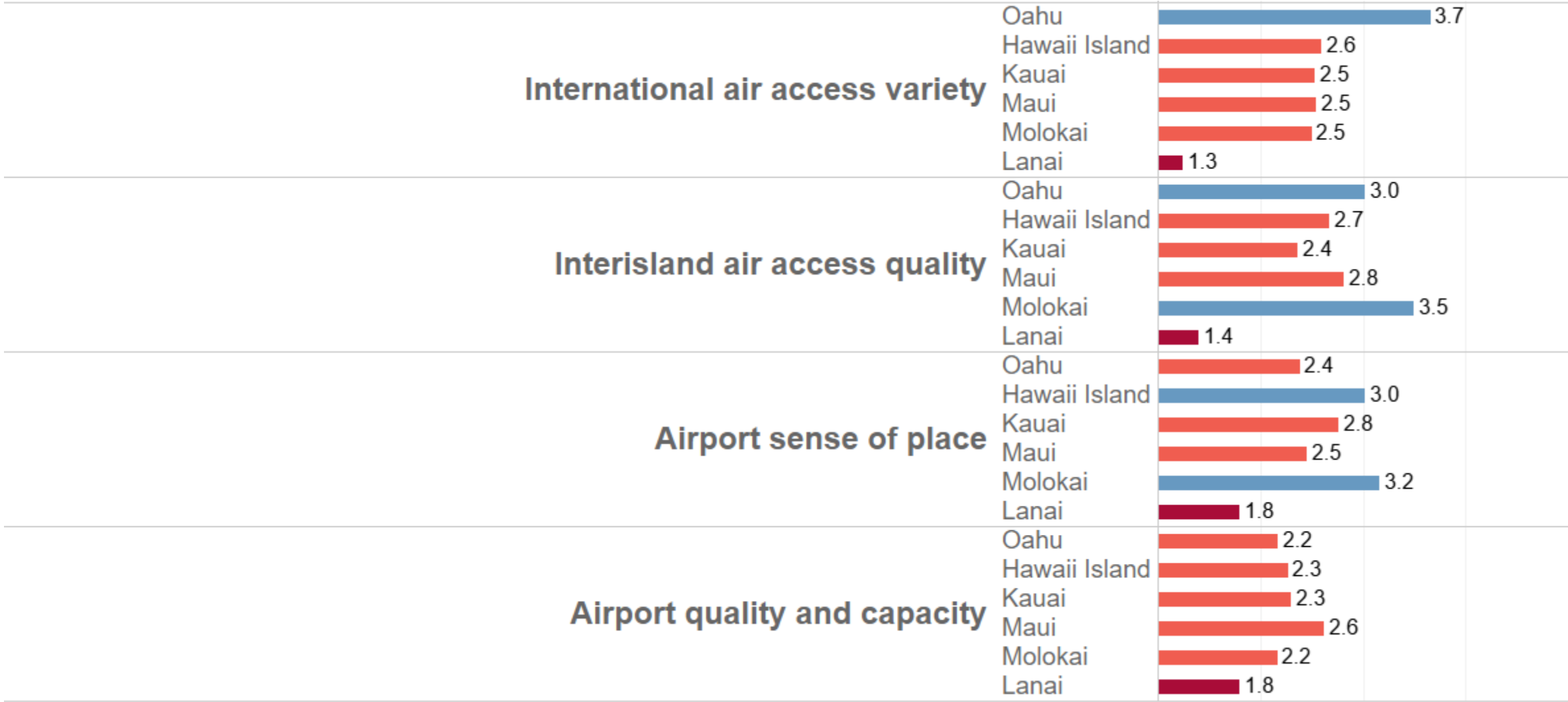

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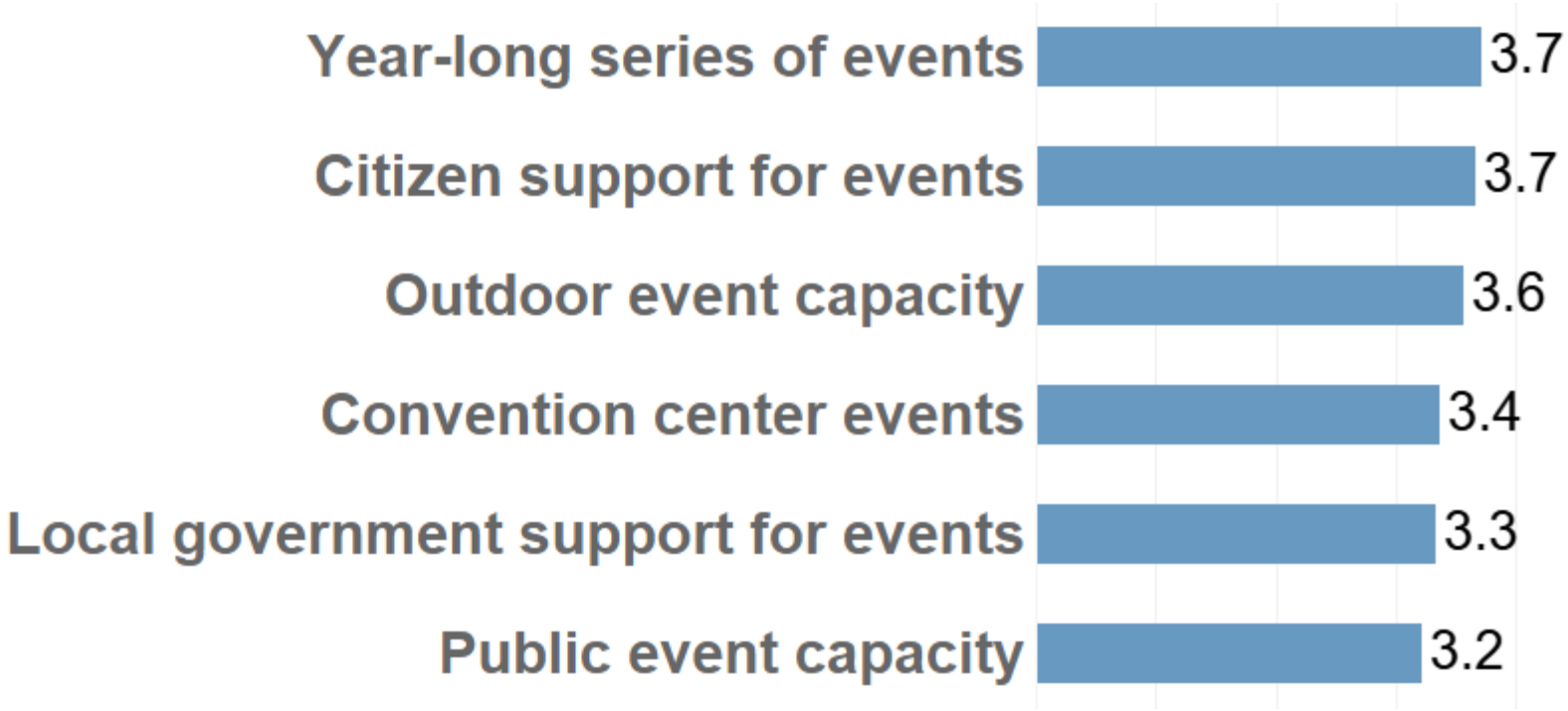
Events



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Events by Location

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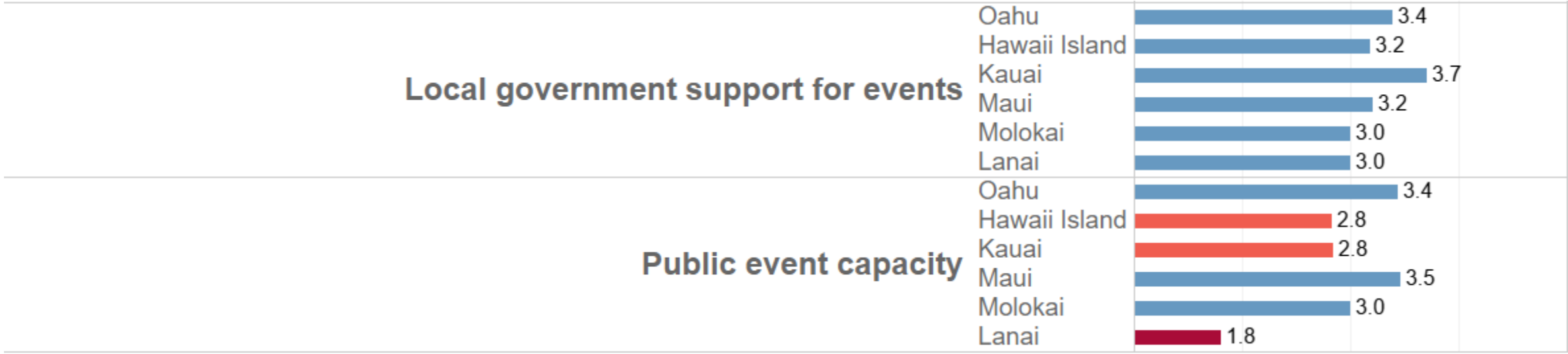
Events by Location



Note
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Accommodation

Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Accommodation by Location

Note
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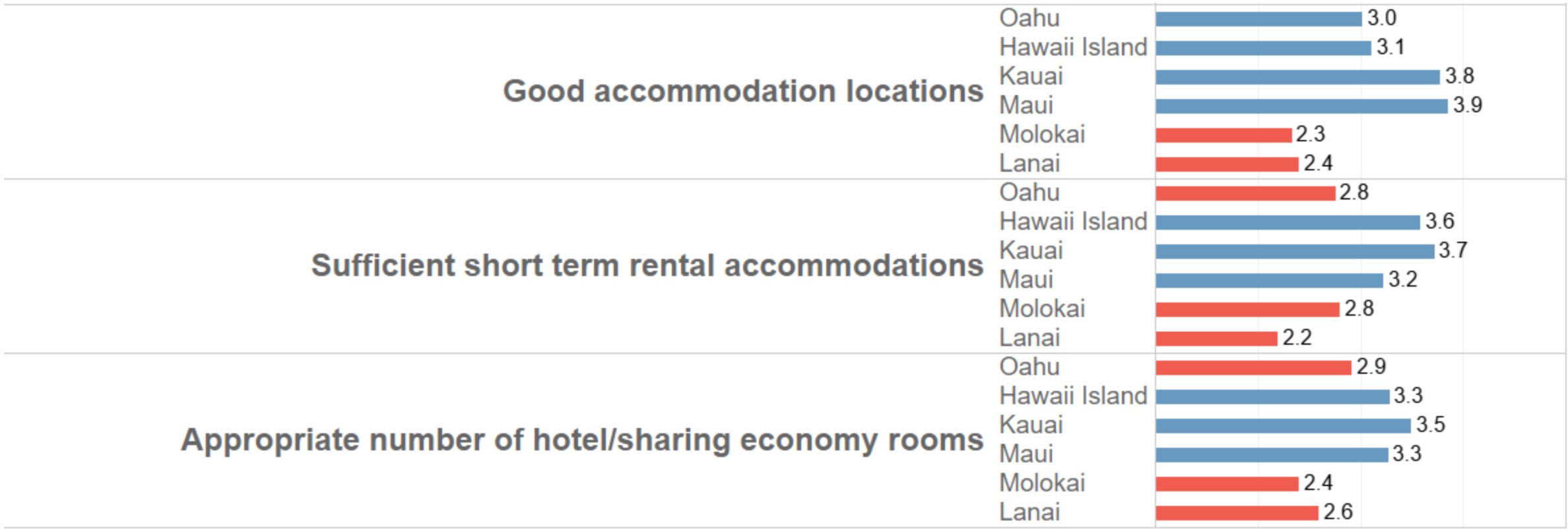
Accommodation by Location



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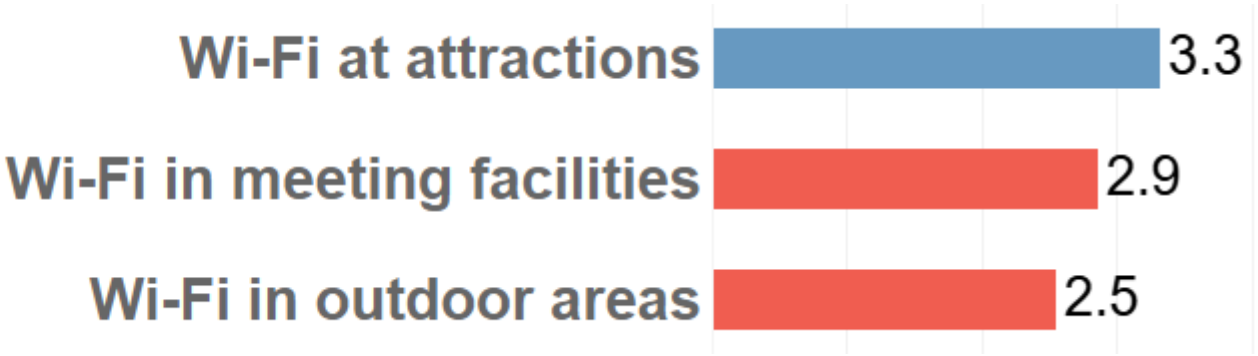
Communication & Internet Infrastructure



Note
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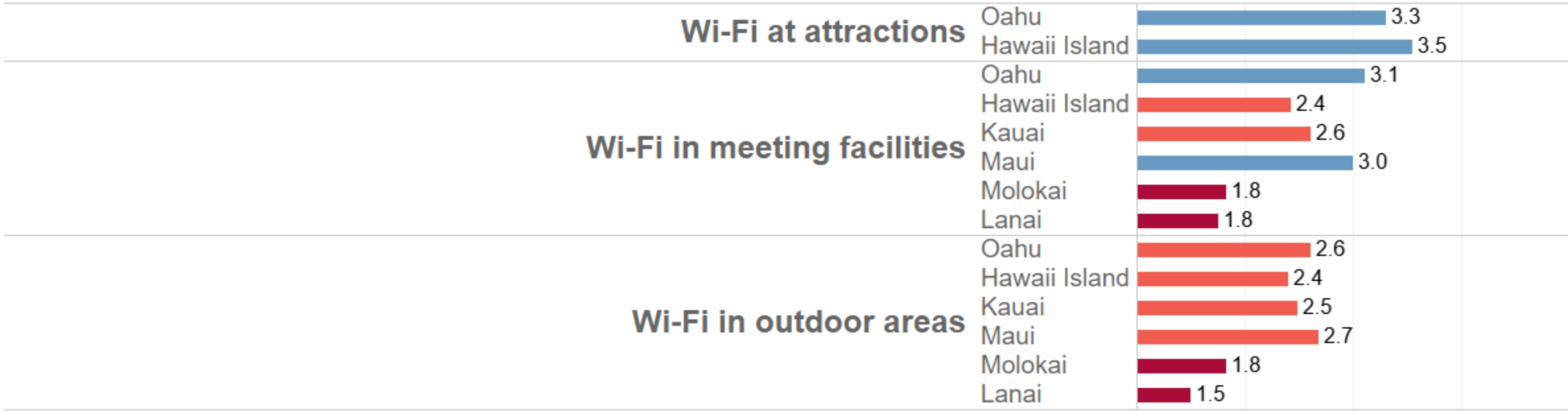
Communication & Internet Infrastructure by Location



Note
"Wi-Fi at attractions" question was only asked for Oahu and Hawaii Island
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

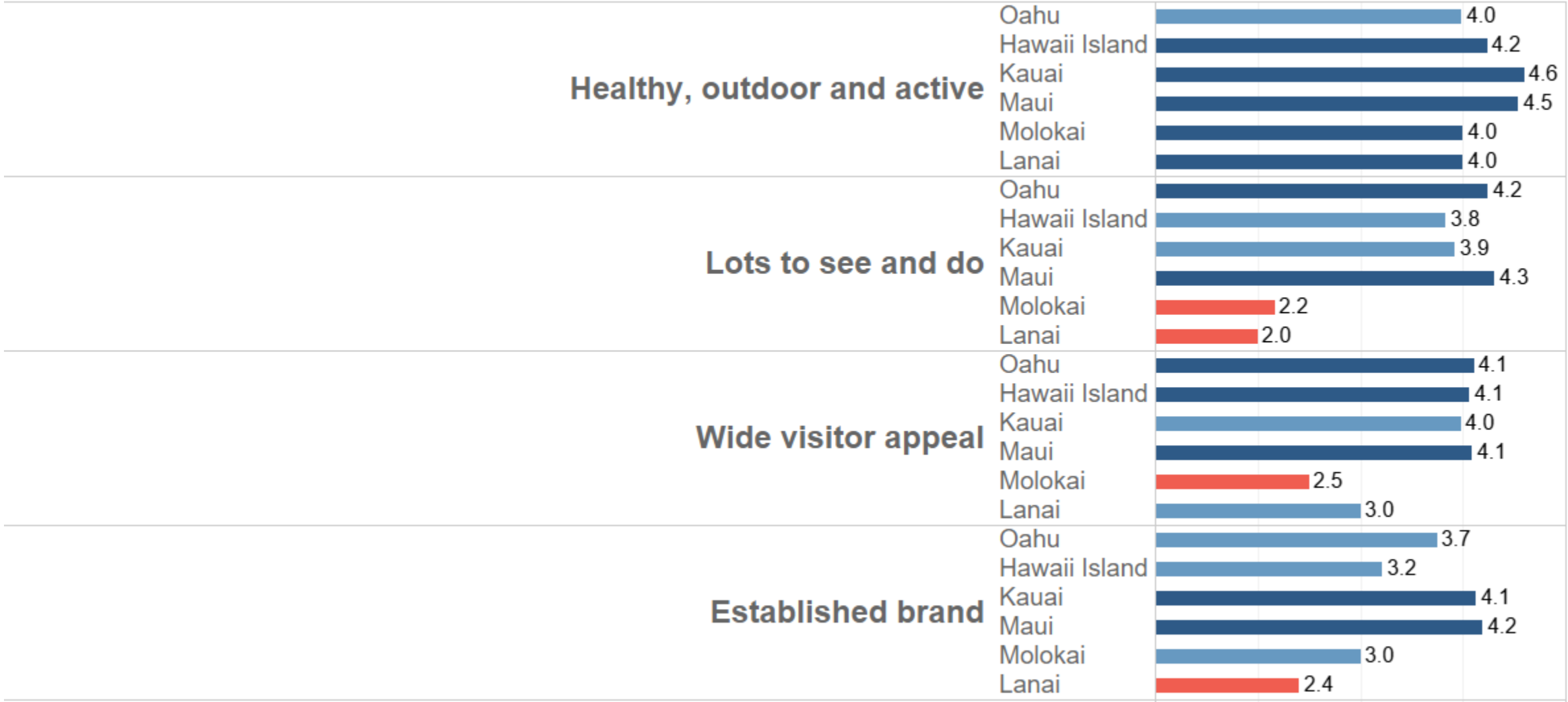
Oahu Convention & Meeting Facilities

Note
Convention & Meeting Facilities questions was only included on the Oahu survey questionnaire
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Brand

Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Brand by Location



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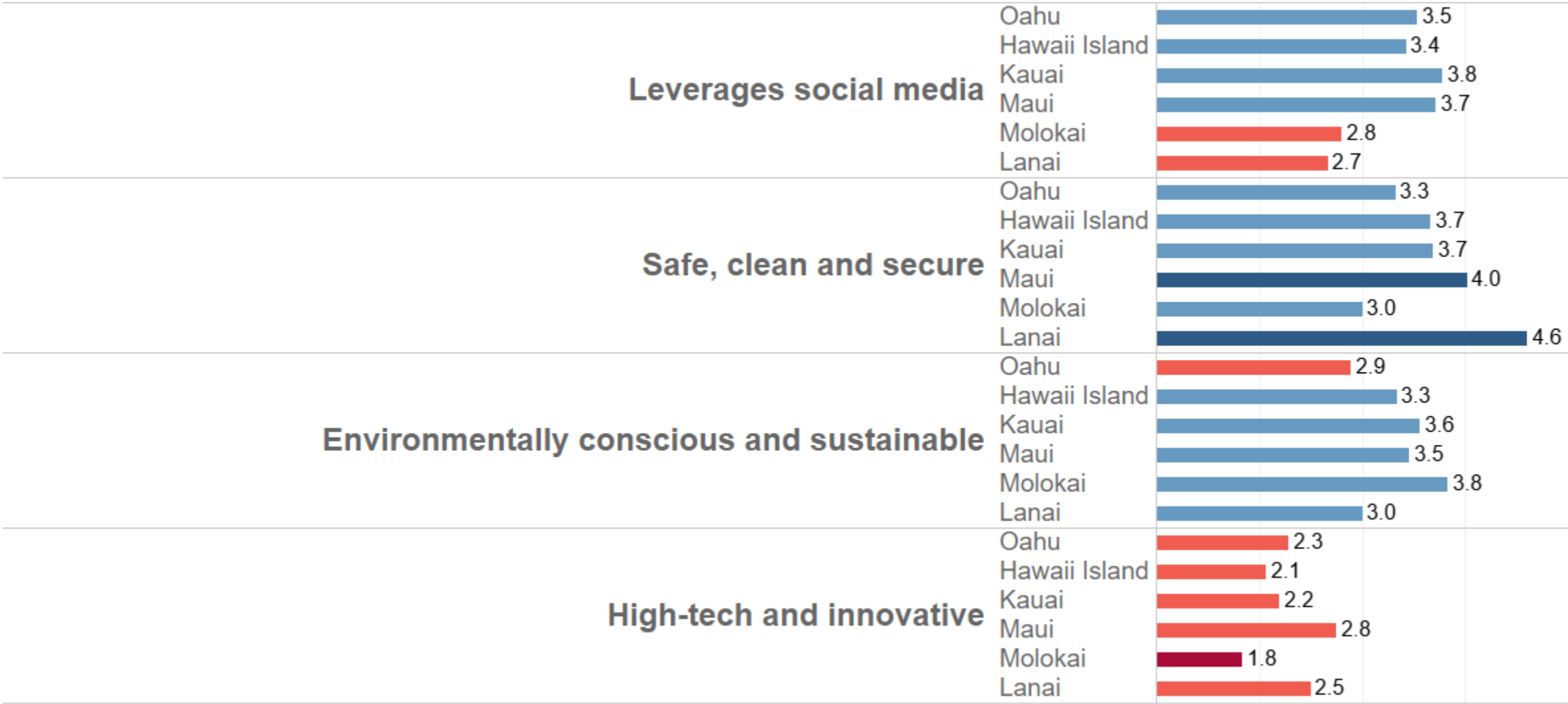
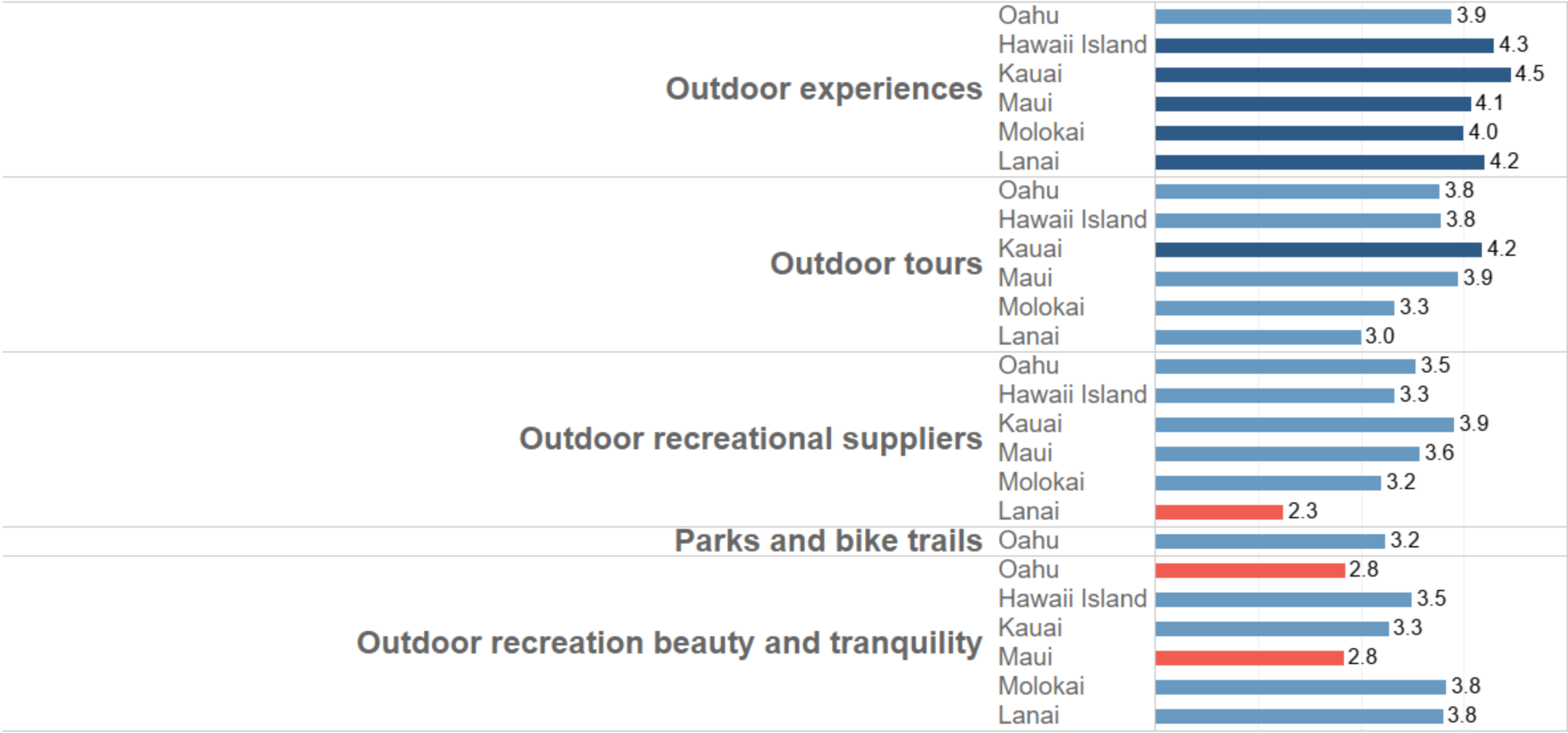


Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Outdoor Recreation & Sports Facilities

Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Outdoor Recreation & Sports Facilities by Location



Note
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Outdoor Recreation & Sports Facilities by Location

Note
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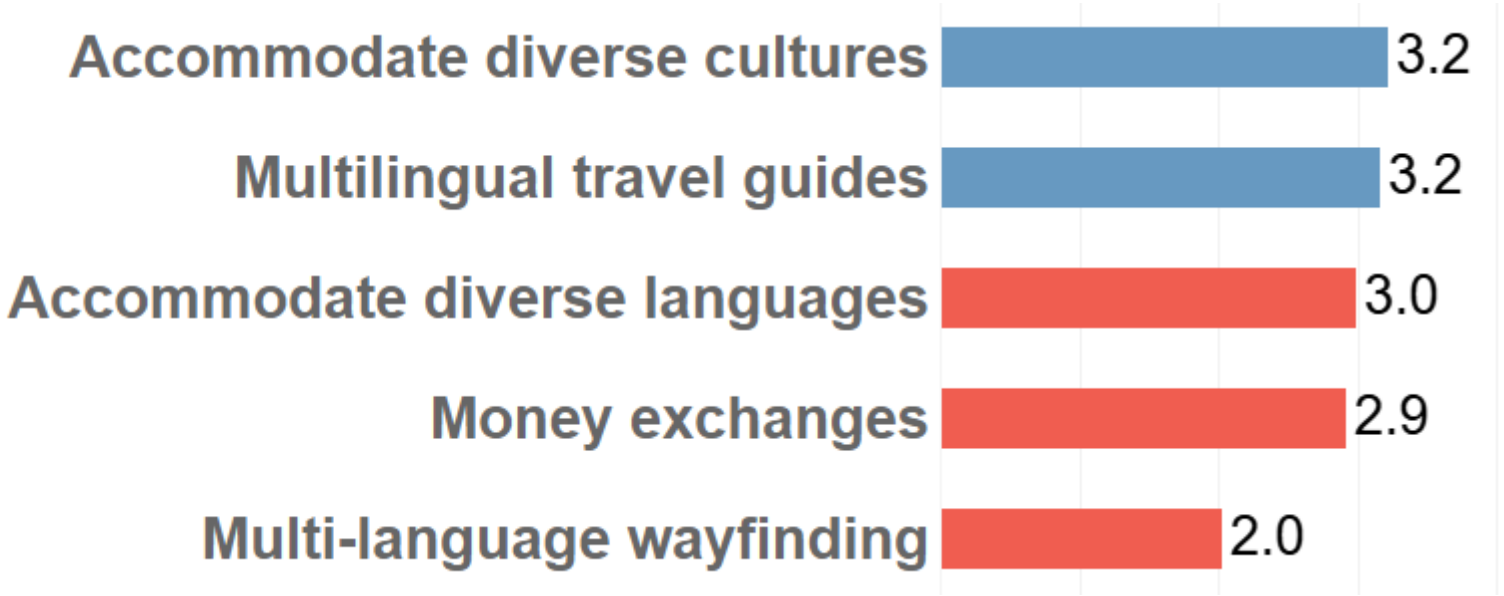
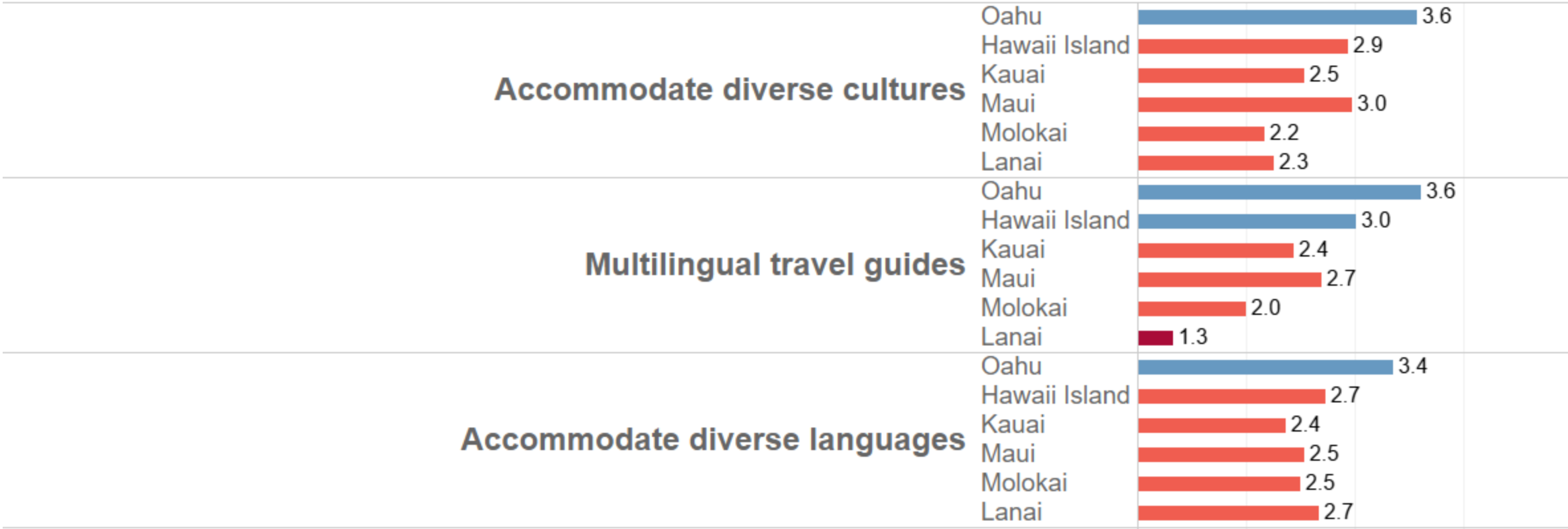
International Readiness



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

International Readiness by Location



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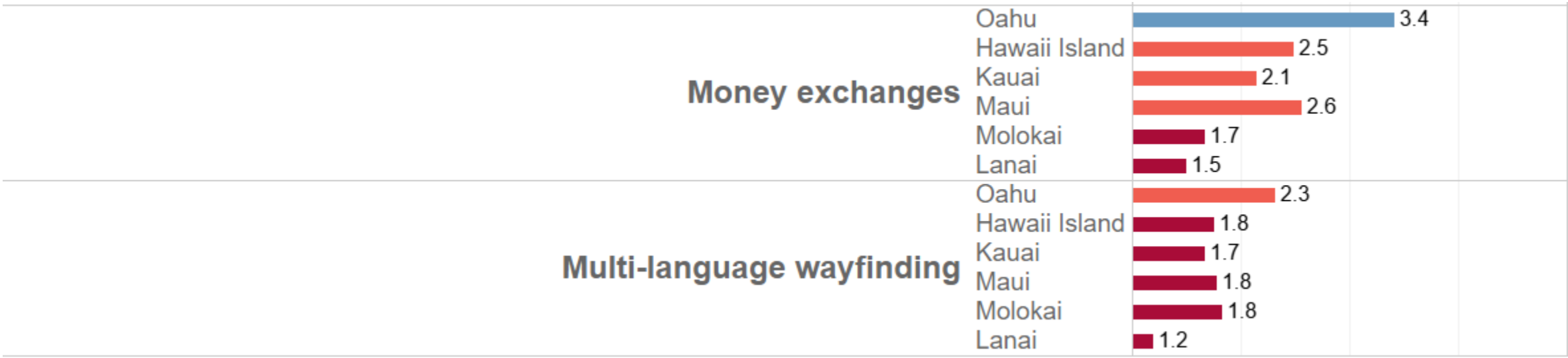
International Readiness by Location



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Community Alignment Rankings

	Relative Importance	Perceived Performance
Hawaiian Culture	1st	8th
Policy & Regulatory Environment	2nd	6th
Industry Support	3rd	2nd
Organization Governance Model	4th	5th

Community Alignment – Report Card

Variable	Relative Importance (0-100%)		Perceived Performance (1-5 scale)		
	Industry Average	Hawaii Average	Industry Average	Hawaii Average	Standard Deviation
Hawaiian Culture	N/A	11.2%	N/A	3.28	0.78
Effective Advocacy Program	10.1%	10.7%	3.48	3.32	0.47
Industry Support	10.0%	10.7%	3.69	3.55	0.58
Effective DMO Governance Model	9.5%	10.2%	3.67	3.35	0.64
Economic Development	10.3%	10.2%	3.89	3.62	0.48
Workforce	10.2%	10.1%	3.15	2.87	0.70
Hospitality Culture	10.3%	9.8%	3.61	3.48	0.69
Local Community Support	10.3%	9.7%	3.48	3.32	0.32
Regional Cooperation	10.1%	8.9%	3.63	3.50	0.59
Funding Support & Certainty	10.1%	8.6%	3.17	3.08	0.59

COMMUNITY ALIGNMENT - Hawaii	**3.34**
INDUSTRY AVERAGE COMMUNITY ALIGNMENT	**3.55**

RESULTING SCENARIO	**EXPLORERS**

Note
Green signifies **overperforming** by greater than 0.2.
Yellow signifies **underperforming** by greater than 0.2 but less than 0.4.
Red signifies **underperforming** by greater than 0.4.

Community Alignment – Location Report Card

Variable	Perceived Performance (1-5 scale) Hawaii Average	Oahu	Hawaii Island	Maui	Kauai	Molokai	Lanai
Hawaiian Culture	3.28	3.24	3.44	3.16	3.40	2.30	4.00
Effective Advocacy Program	3.32	3.30	3.35	3.25	3.55	3.05	2.85
Industry Support	3.55	3.45	3.78	3.51	3.81	3.30	3.40
Effective DMO Governance Model	3.35	3.26	3.55	3.30	3.72	2.53	3.22
Economic Development	3.62	3.55	3.71	3.71	3.93	2.60	3.50
Workforce	2.87	2.84	3.00	2.88	2.77	1.90	3.54
Hospitality Culture	3.48	3.37	3.63	3.81	3.57	2.10	3.75
Local Community Support	3.32	3.28	3.44	3.34	3.43	2.53	3.36
Regional Cooperation	3.50	3.42	3.64	3.47	3.94	2.83	3.00
Funding Support & Certainty	3.08	2.99	3.09	3.27	3.35	2.58	3.50

COMMUNITY ALIGNMENT - Hawaii	**3.34**
INDUSTRY AVERAGE COMMUNITY ALIGNMENT	**3.55**

RESULTING SCENARIO	**EXPLORERS**

Note
Green signifies **overperforming** by greater than 0.2.
Yellow signifies **underperforming** by greater than 0.2 but less than 0.4.
Red signifies **underperforming** by greater than 0.4.

Community Alignment – Stakeholder Report Card

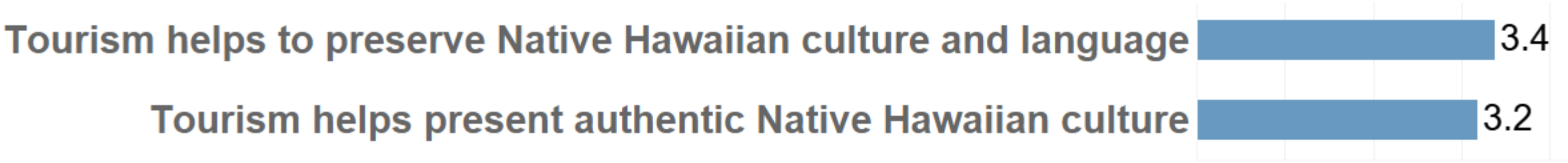
Variable	Perceived Performance (1-5 scale) Hawaii Average	HTA Board of Directors & Staff	Stakeholder in the Visitor Industry	Government Leaders	Community Leaders	Associations
Hawaiian Culture	3.28	3.66	3.29	2.97	3.18	3.37
Policy & Regulatory Environment	3.32	3.45	3.31	3.25	3.33	3.34
Industry Support	3.55	3.71	3.54	3.46	3.70	3.62
Organization Governance Model	3.35	3.75	3.34	3.22	3.39	3.41
Economic Development	3.62	3.70	3.62	3.50	3.67	3.62
Workforce	2.87	2.92	2.86	2.78	2.88	3.05
Hospitality Culture	3.48	3.45	3.48	3.38	3.32	3.71
Local Community Support	3.32	3.38	3.31	3.24	3.35	3.46
Regional Cooperation	3.50	3.88	3.48	3.44	3.54	3.66
Funding Support & Certainty	3.08	3.02	3.07	3.10	3.02	3.27

COMMUNITY ALIGNMENT - Hawaii	**3.34**
INDUSTRY AVERAGE COMMUNITY ALIGNMENT	**3.55**

RESULTING SCENARIO	**EXPLORERS**

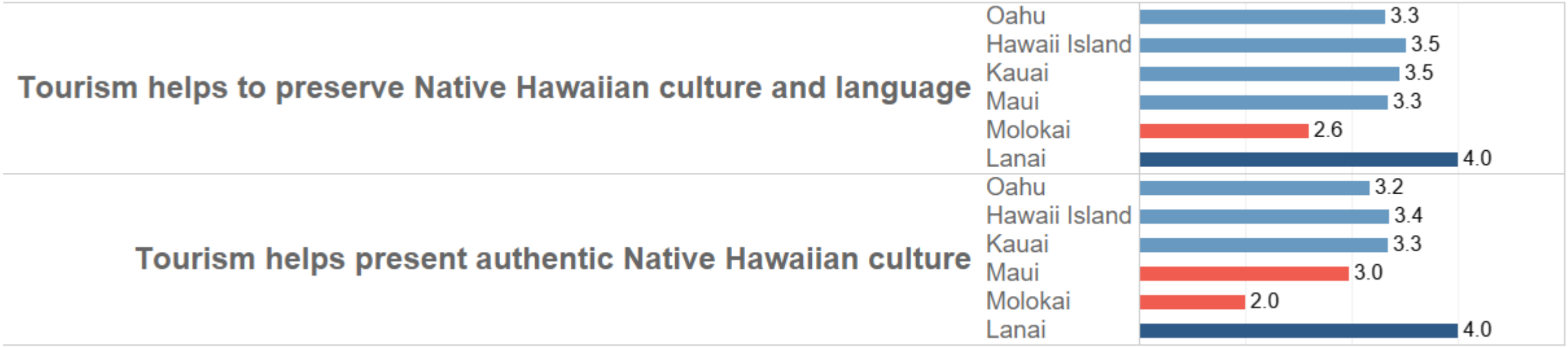
Note
Green signifies **overperforming** by greater than 0.2.
Yellow signifies **underperforming** by greater than 0.2 but less than 0.4.
Red signifies **underperforming** by greater than 0.4.

Hawaiian Culture



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Hawaiian Culture by Location



Note
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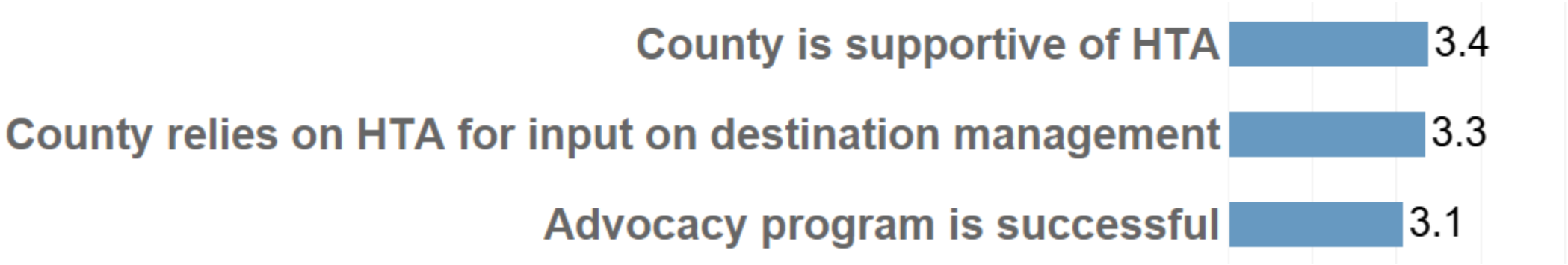
Policy & Regulatory Environment



Note
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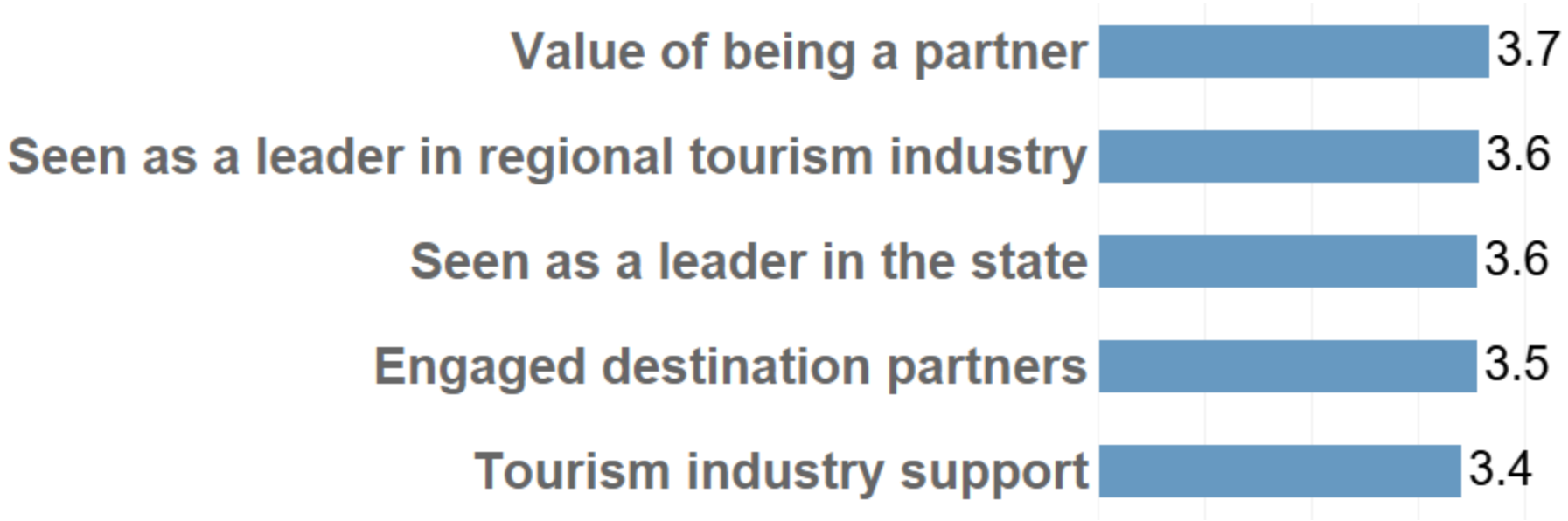
Policy & Regulatory Environment by Location

Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Industry Support



Note
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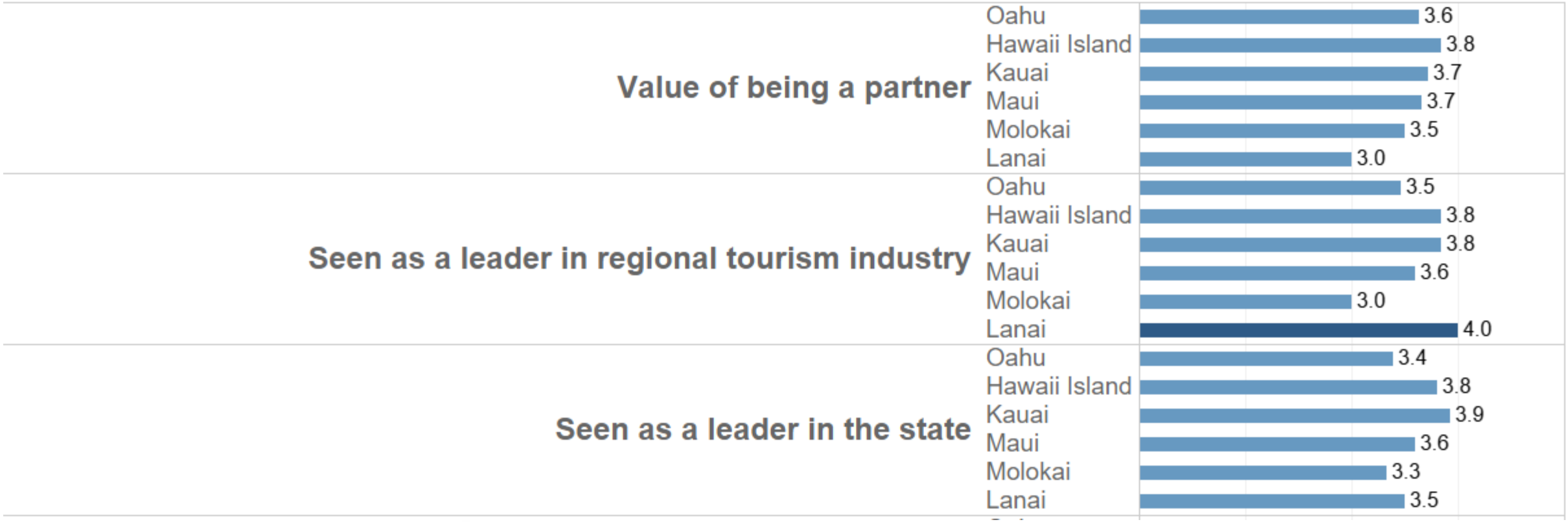
Industry Support by Location



Note
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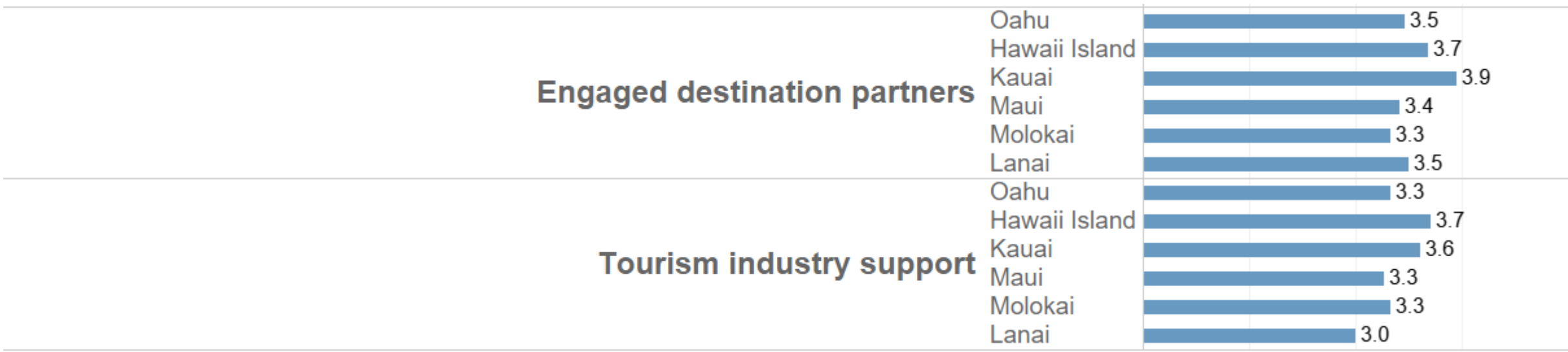
Industry Support by Location



Note
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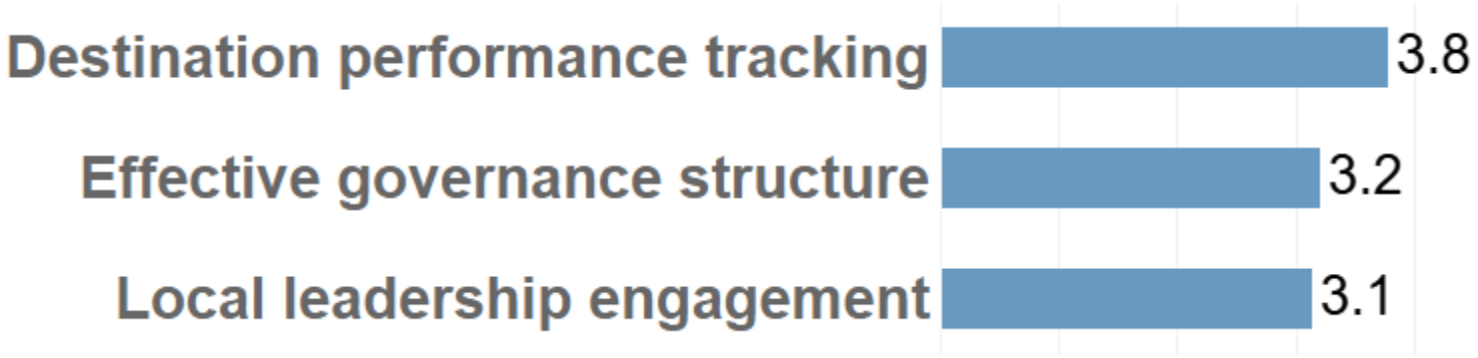
Organization Governance Model



Note
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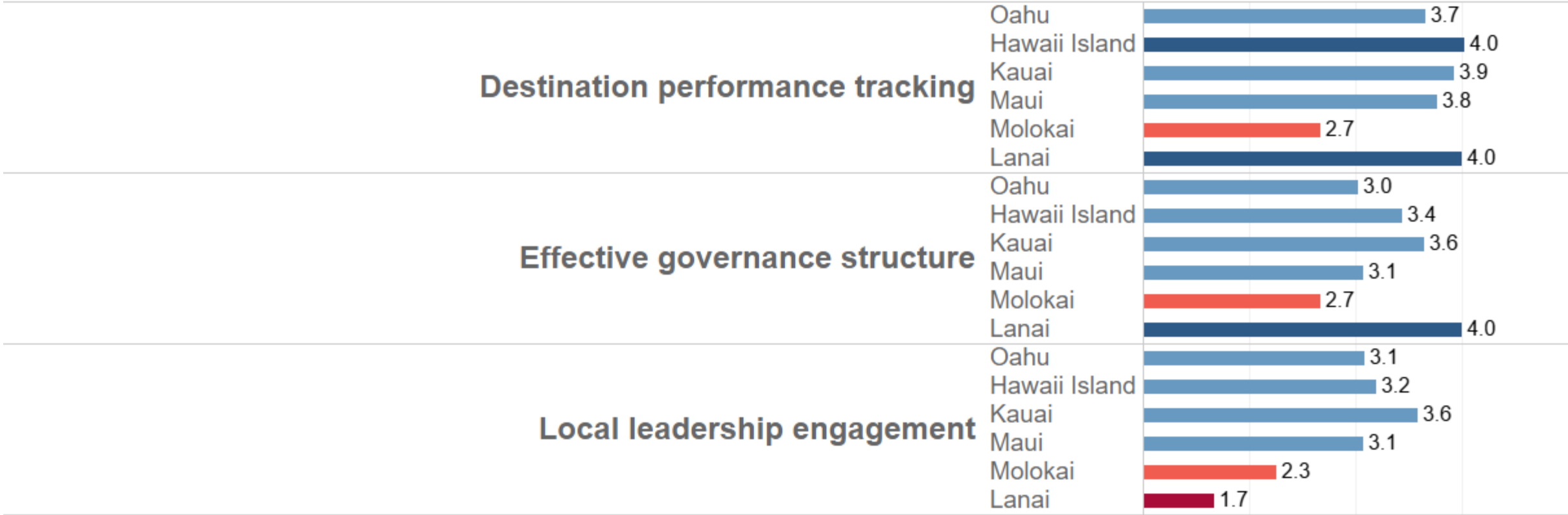
Organization Governance Model by Location



Note
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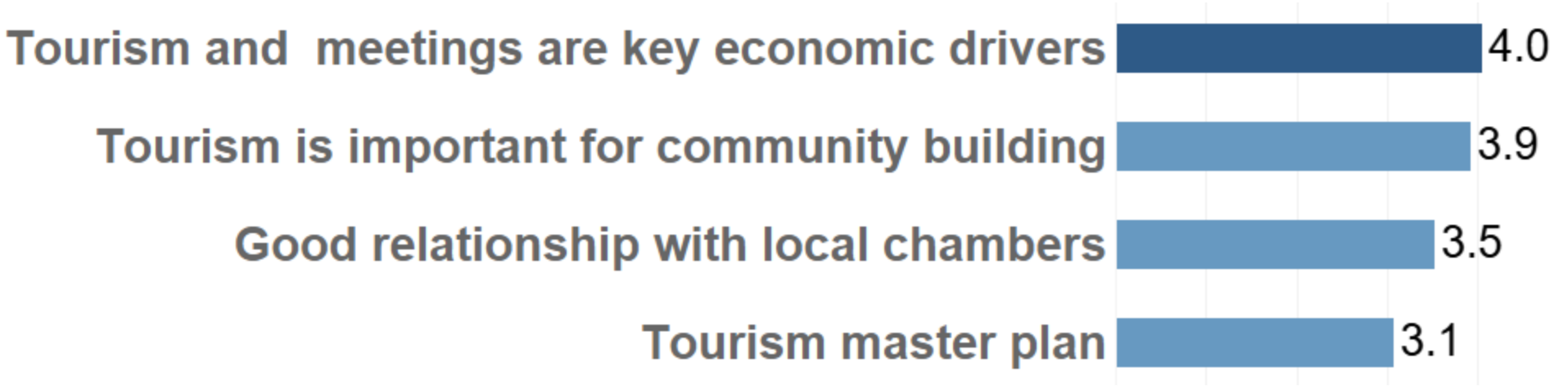
Economic Development



Note
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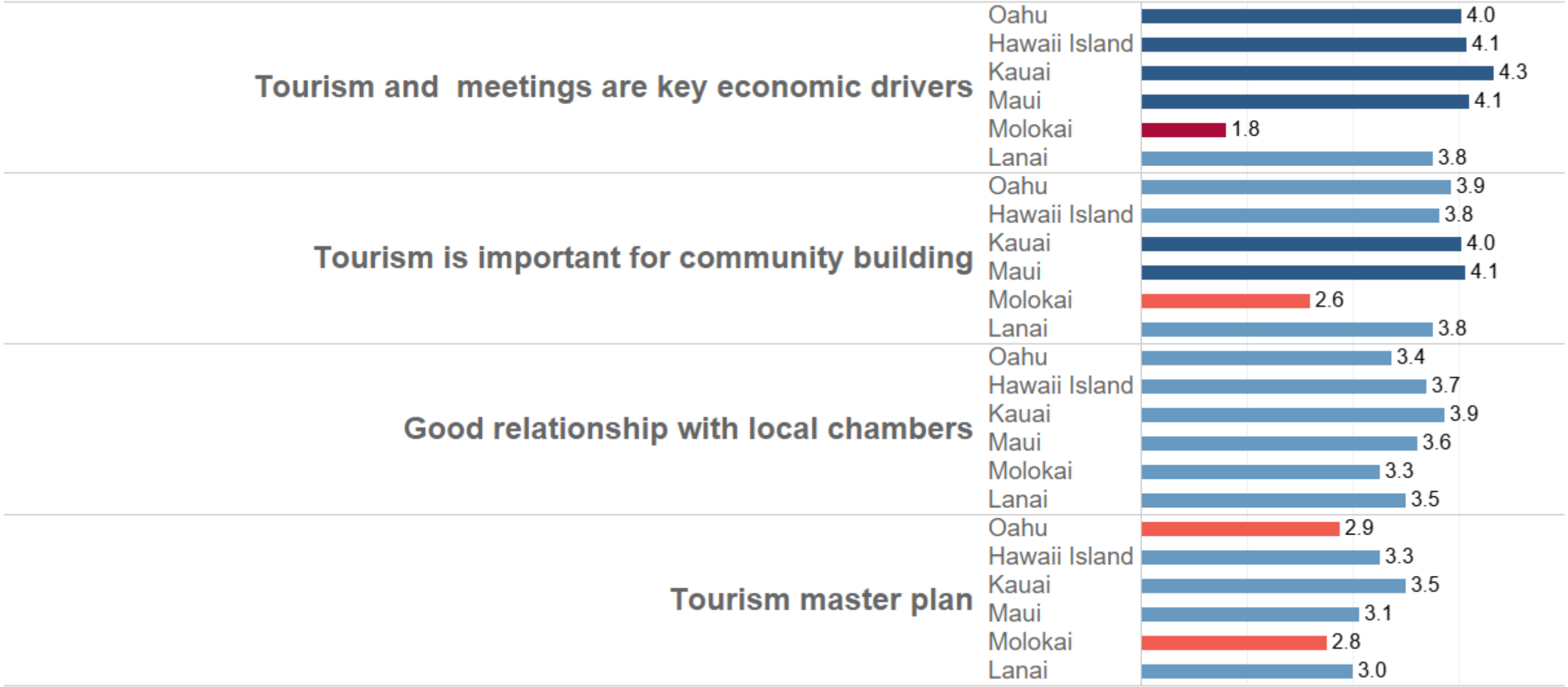
Economic Development by Location



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

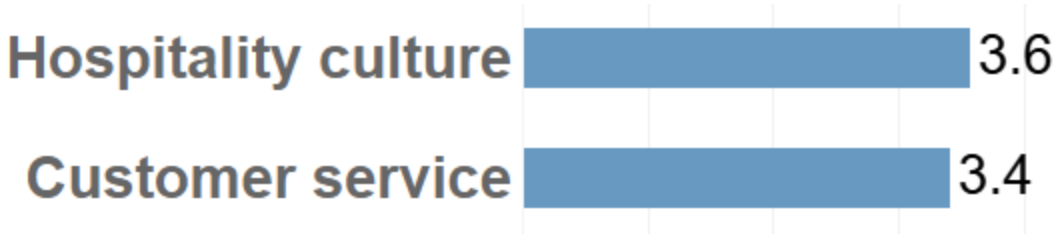
Workforce

Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Workforce by Location

Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Hospitality Culture



Note
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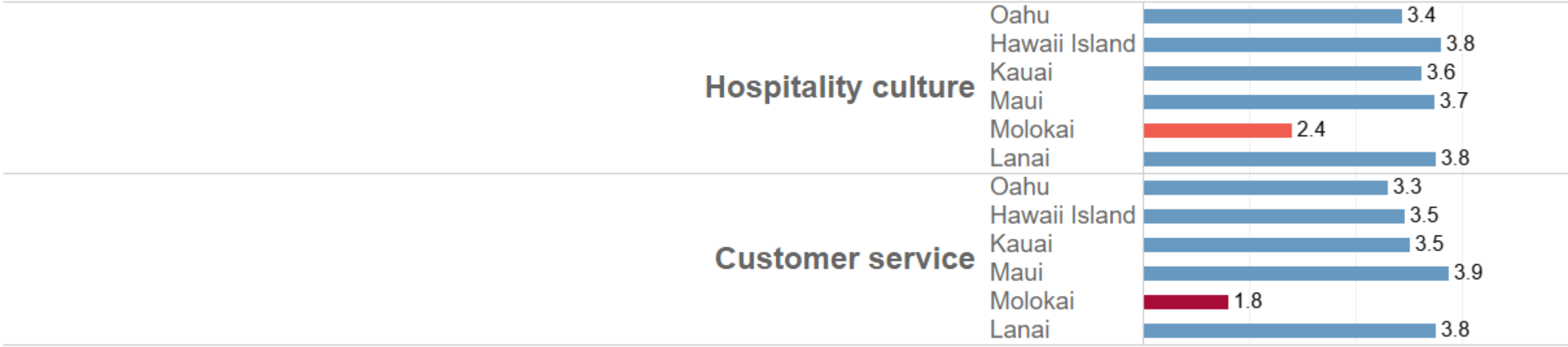
Hospitality Culture by Location



Note
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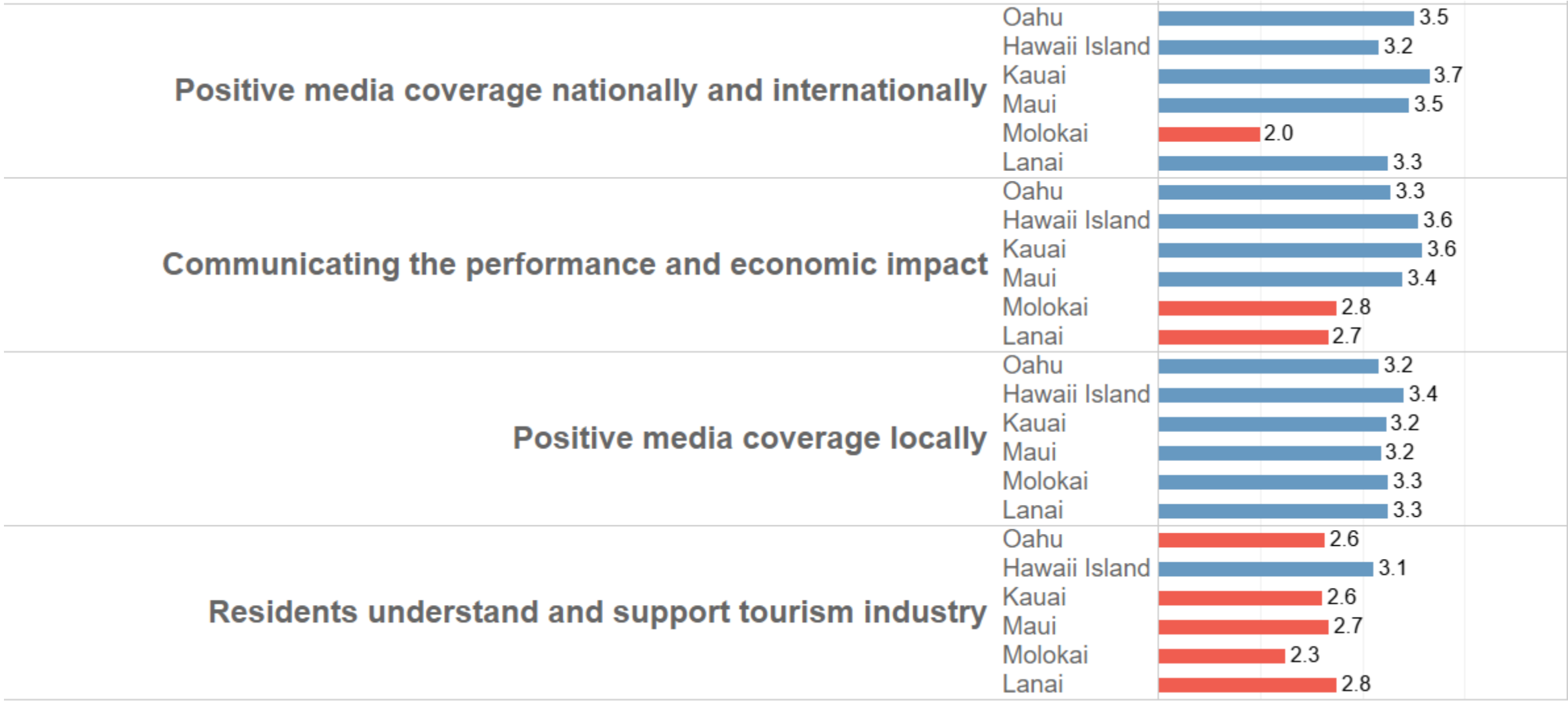
Local Community Support

Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Local Community Support by Location

Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Local Community Support by Location



Note
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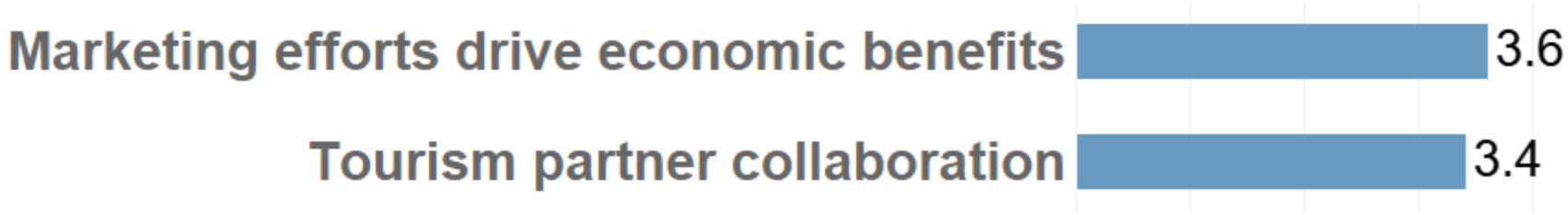
Regional Collaboration



Note
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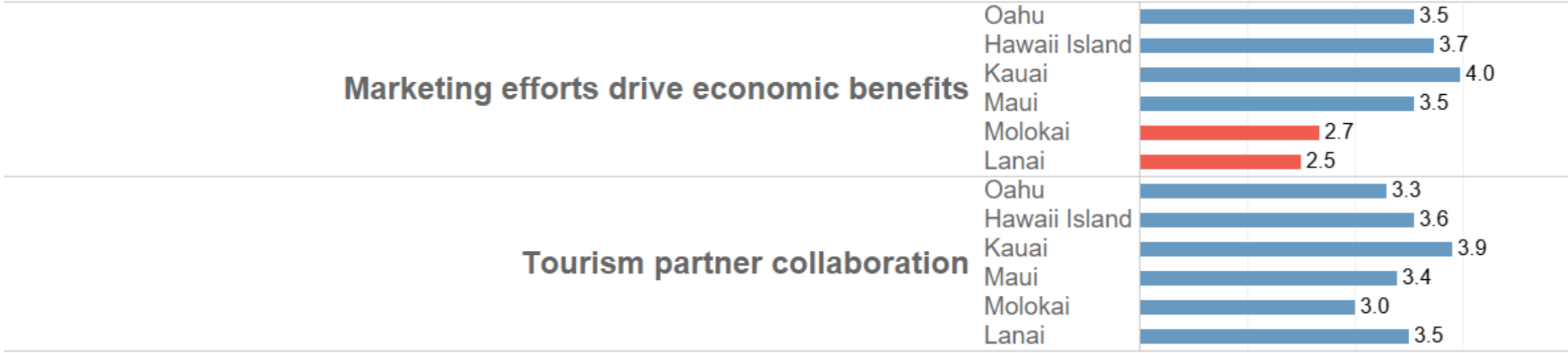
Regional Collaboration by Location



Note
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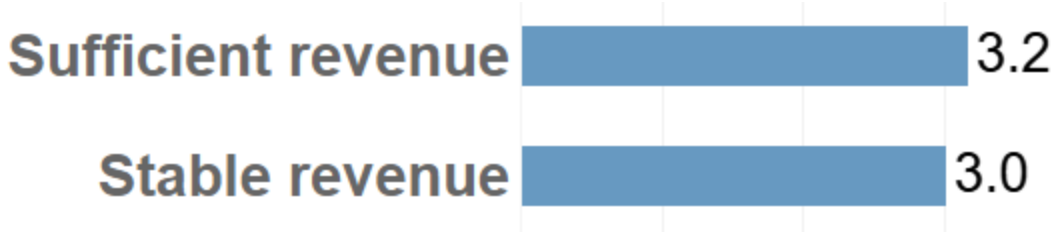
Funding Support & Certainty



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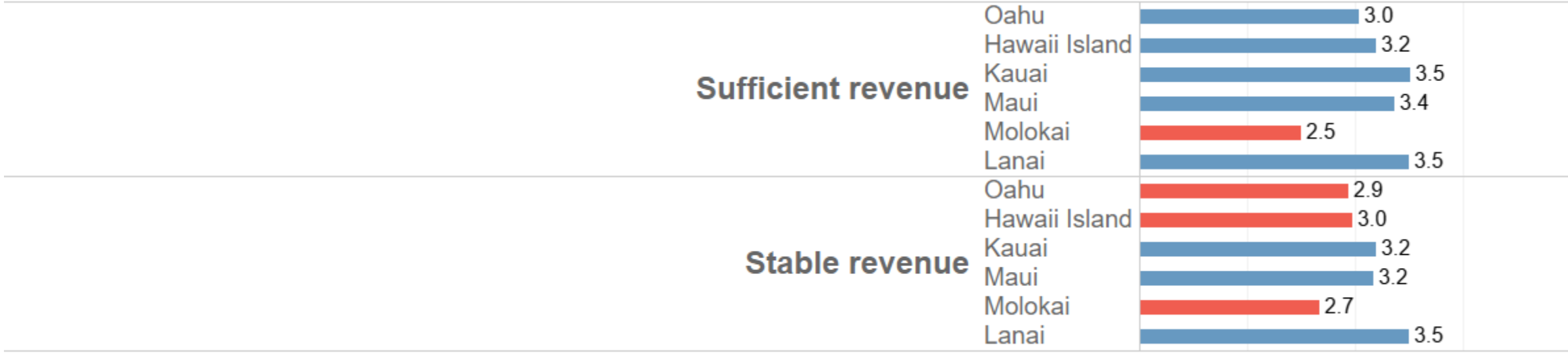
Funding Support & Certainty by Location



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

Key Takeaways

- **Currently in Explorers quadrant with below industry average destination strength and community alignment**
- **Stakeholders are somewhat aligned on perceptions about destination**

Destination Strength - Opportunities for Improvement

- Unique neighborhoods
- Mobility & access
- Airport quality
- Inter-island air service
- Wi-Fi
- Innovative brand
- Sporting facilities
- Camping facilities
- Multi-language wayfinding

Community Alignment - Opportunities for Improvement

- Workforce
- Labor relations
- Resident support
- Tourism master plan
- Local leadership engagement

Destination Strength Key Takeaways

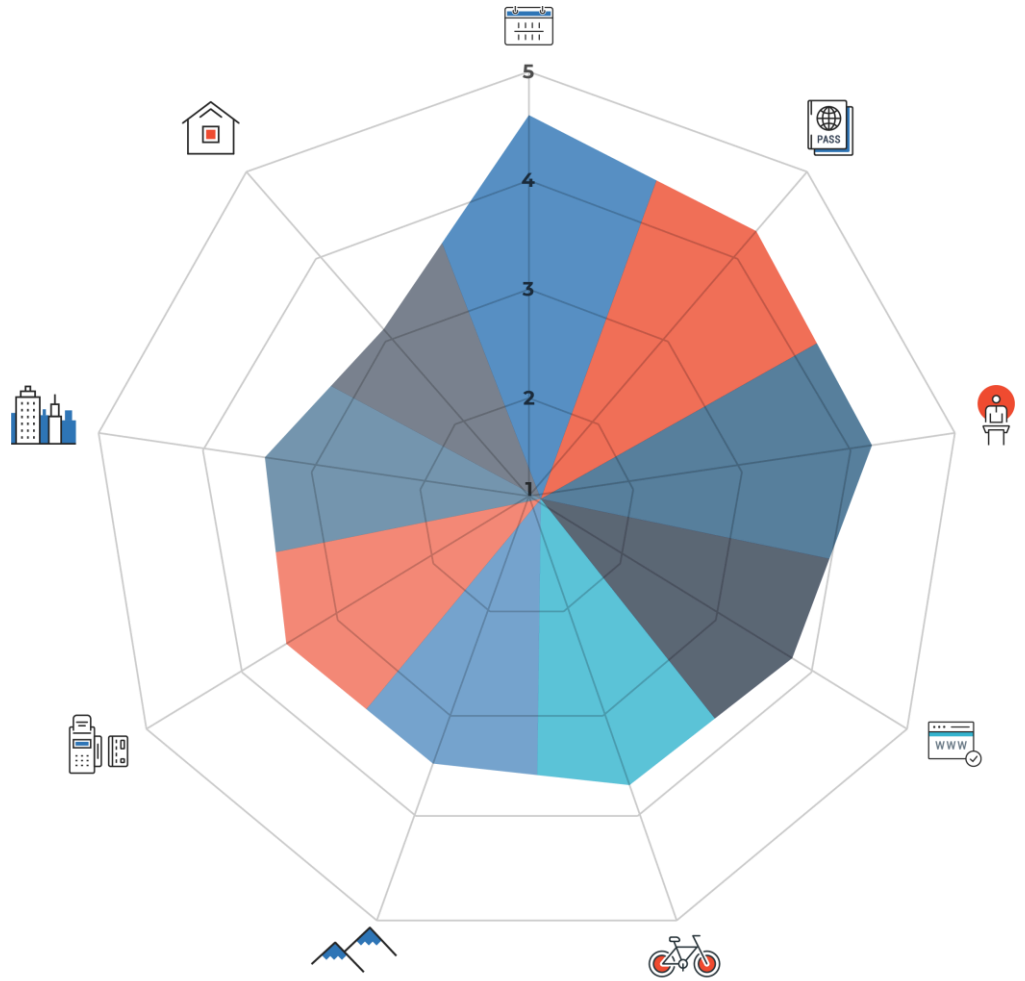
Opportunity for Improvement	Oahu	Hawaii Island	Maui	Kauai	Molokai	Lanai
Attractions & Entertainment				—	—	—
Mobility & Access				—	✓	✓
Air Access		—				—
Accommodation			✓	✓	—	—
Communication & Internet Infrastructure					—	—
Brand			✓		—	—
International Readiness	✓	—	—	—	—	—

Community Alignment Key Takeaways

Opportunity for Improvement	Oahu	Hawaii Island	Maui	Kauai	Molokai	Lanai
Hawaiian Culture					—	✓
Effective Advocacy Program				✓	—	—
Industry Support		✓		✓	—	
Economic Development				✓	—	
Workforce					—	✓
Hospitality Culture			✓		—	✓
Regional Cooperation				✓	—	—

Sustainability Index

- Events are positive for the community & don't adversely affect quality of life
- Number of international visitors is a positive for the area
- Adequately handle the additional number of visitors during big events
- Sufficient broadband to accommodate surge in visitors during peak periods
- Number of visitors utilizing biking paths and walking trails are acceptable
- Number of visitors utilizing outdoor recreation facilities are acceptable
- Visitors don't impede local residents' enjoyment of local amenities
- Has adequate capacity and infrastructure to accommodate visitors
- Sharing economy capacity is not impeding quality of life for locals



Note
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Appendix A: DestinationNEXT Futures Study 2019

Appendix B: DestinationNEXT Assessment Questionnaire