



Hawai'i Tourism Authority

DestinationNEXT Assessment

Board of Directors Meeting

July 28, 2022

 NextFactor

THE FUTURES STUDY

- Overview of trends and strategies for destination organizations worldwide
- Previous studies in 2014, 2017 & 2019
- New Study in July 2021

SCENARIO MODEL

- Detailed assessment of destination strength and alignment
- 300 destinations in 12 countries
- Updated DNEXT model in 2021

6 Global Panels



Disruptors

(Technology, business, health, policy)

Community Leaders

(Government, economic development, education)

Industry/Association

(Leading industry thought leaders)

Supply Chain

(Hotels, airlines, cruise lines, venues, service suppliers)

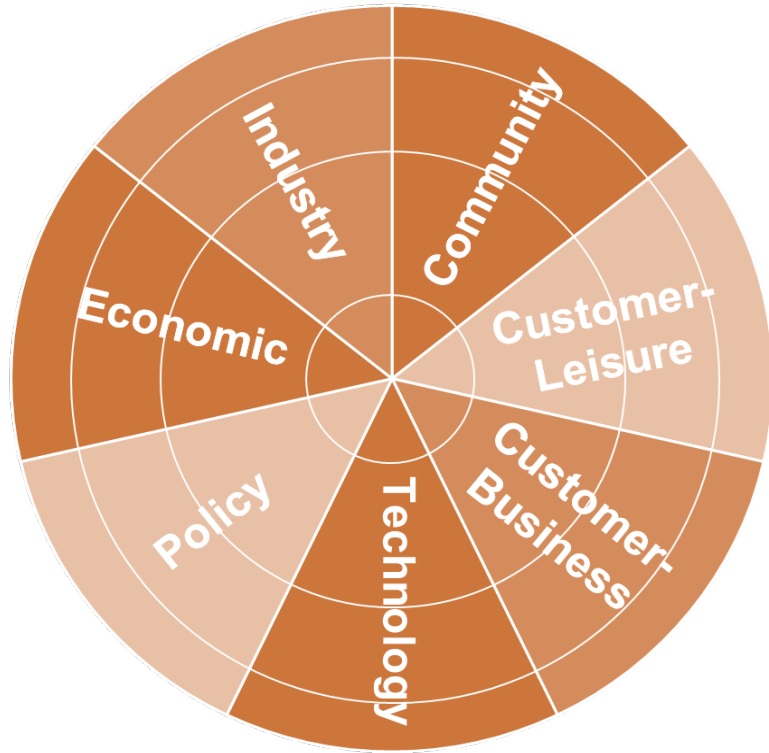
Clients

(Meeting planners, event organizers, tour operators)

Other Sectors

(Key sectors beyond the visitor industry)

Strategic Radar Maps



100

Trends



80

Strategies

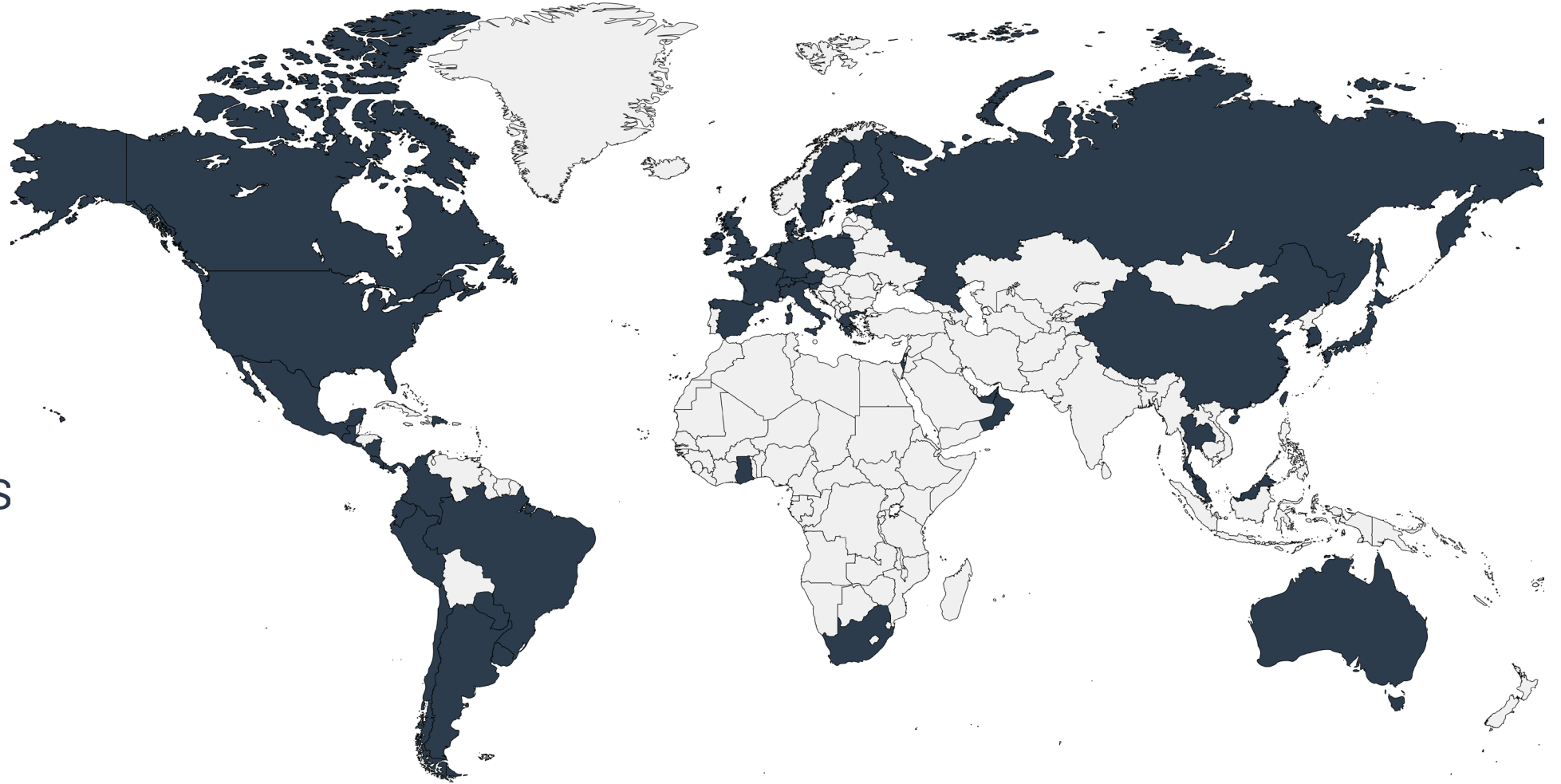
2021 Futures Study Participants

706

Participants

50

Countries



3 Transformational Opportunities

1. DESTINATION ALIGNMENT

Aligning the public, private and civic sectors drives destination performance

2. SUSTAINABLE DEVELOPMENT

Destination and product development should marry people, planet, profit and policy

3. VALUES BASED MARKETING

Community values, goals and energy are the new competitive advantage

DestinationNEXT Scenario Model



Destination Strength Variables



**Attractions &
Experiences**



**Arts, Culture &
Heritage**



**Dining, Shopping &
Entertainment**



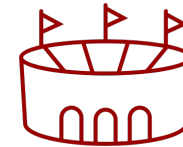
Outdoor Recreation



**Conventions &
Meetings**



Events & Festivals



Sporting Events



Accommodation



**Local Mobility &
Access**



Destination Access

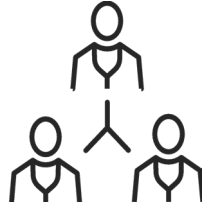


**Communication
Infrastructure**



Health & Safety

Destination Alignment Variables



Business Support



Community Group & Resident Support



Government Support



Organization Governance



Workforce Development



Hospitality Culture



Equity, Diversity & Inclusion



Funding Support & Certainty



Regional Cooperation



Sustainability & Resilience



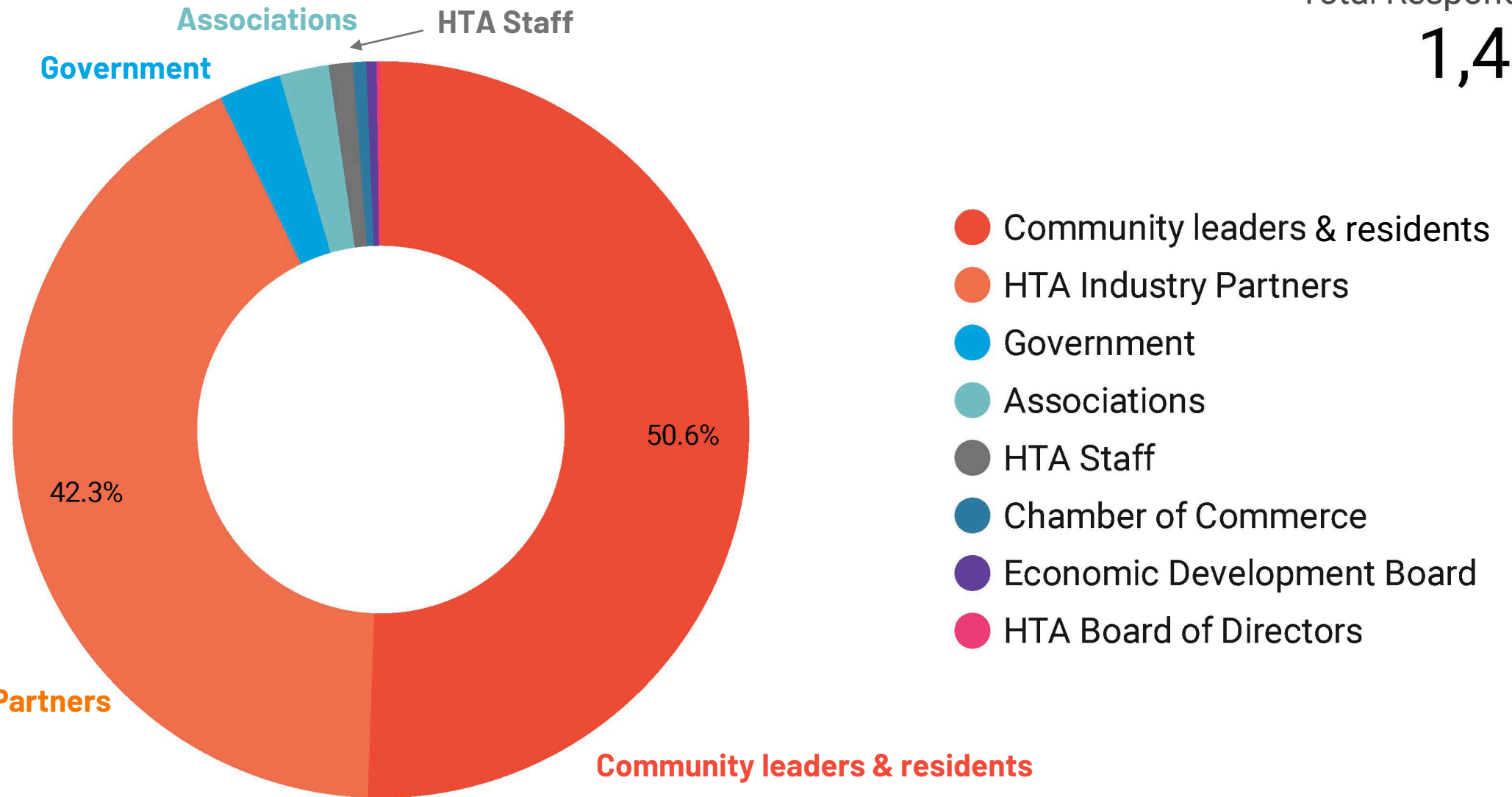
Emergency Preparedness



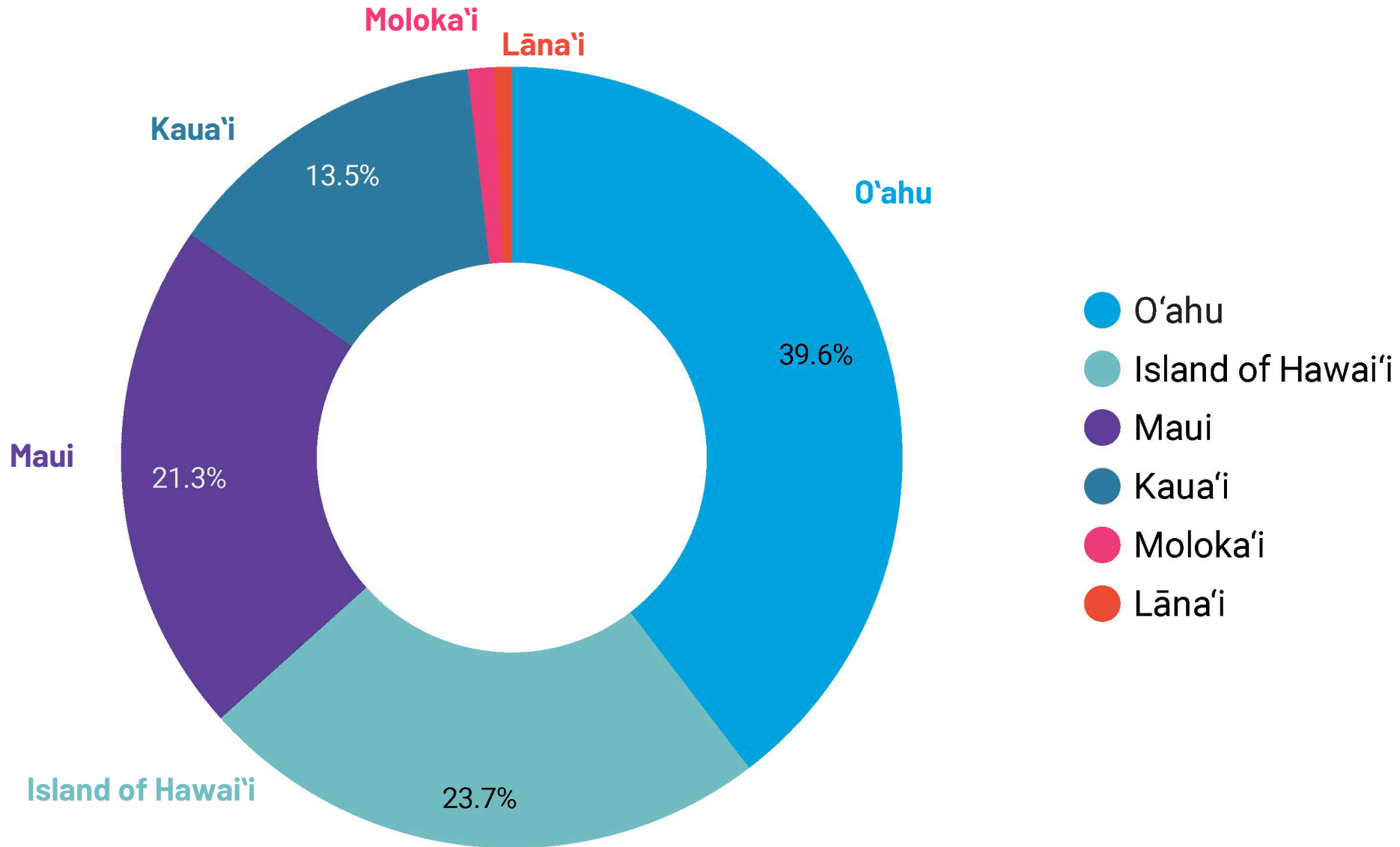
Economic Development

Stakeholder Groups

Total Respondents
1,479



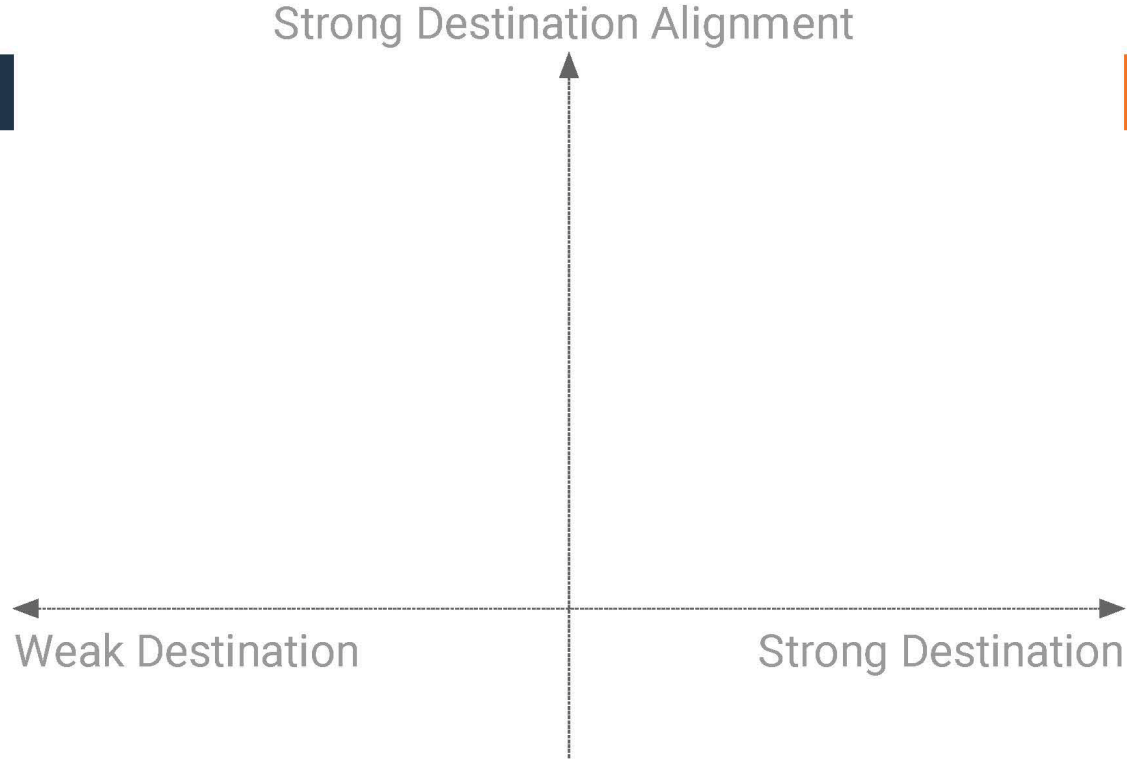
Total Respondents
1,479



Overall Assessment

Voyagers

Trailblazers



Explorers

Mountaineers

Examples of Other Destinations

Voyagers

- Northwest Florida
- Hilton Head Island
- New Smyrna Beach Area
- Shreveport
- Louisville
- Geneva

Trailblazers

- Orlando
- Phoenix
- Sydney
- Newport Beach
- Denver
- Anaheim

Explorers

- Michigan
- Daytona Beach Area
- The Branson region
- Glacier Country
- Niigata, Japan

Mountaineers

- Toronto
- Dallas
- Buffalo & Erie County
- White Mountains

Change Since Last Assessment

Voyagers

Trailblazers



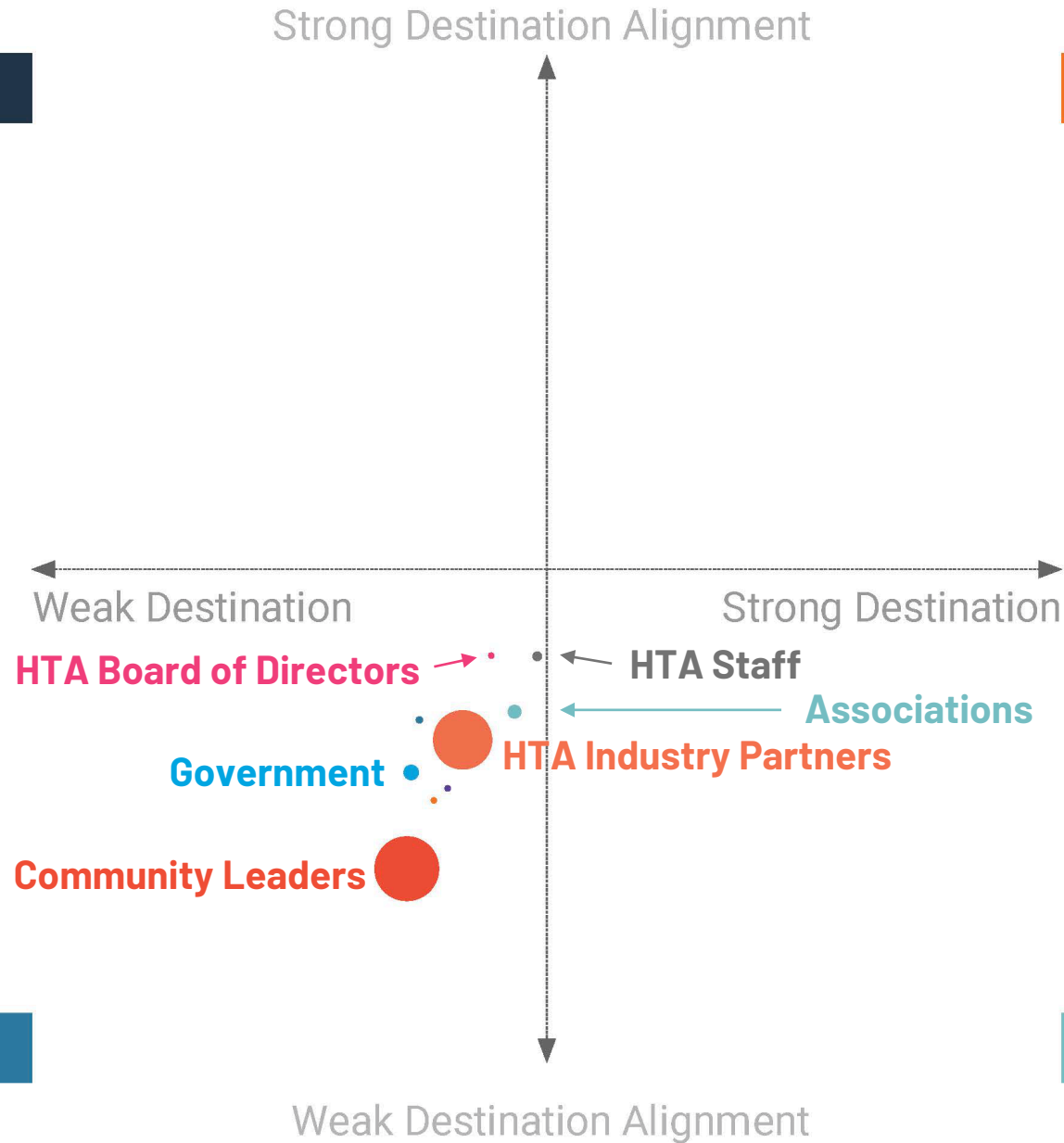
Explorers

Mountaineers

Stakeholder Groups

Voyagers

Trailblazers



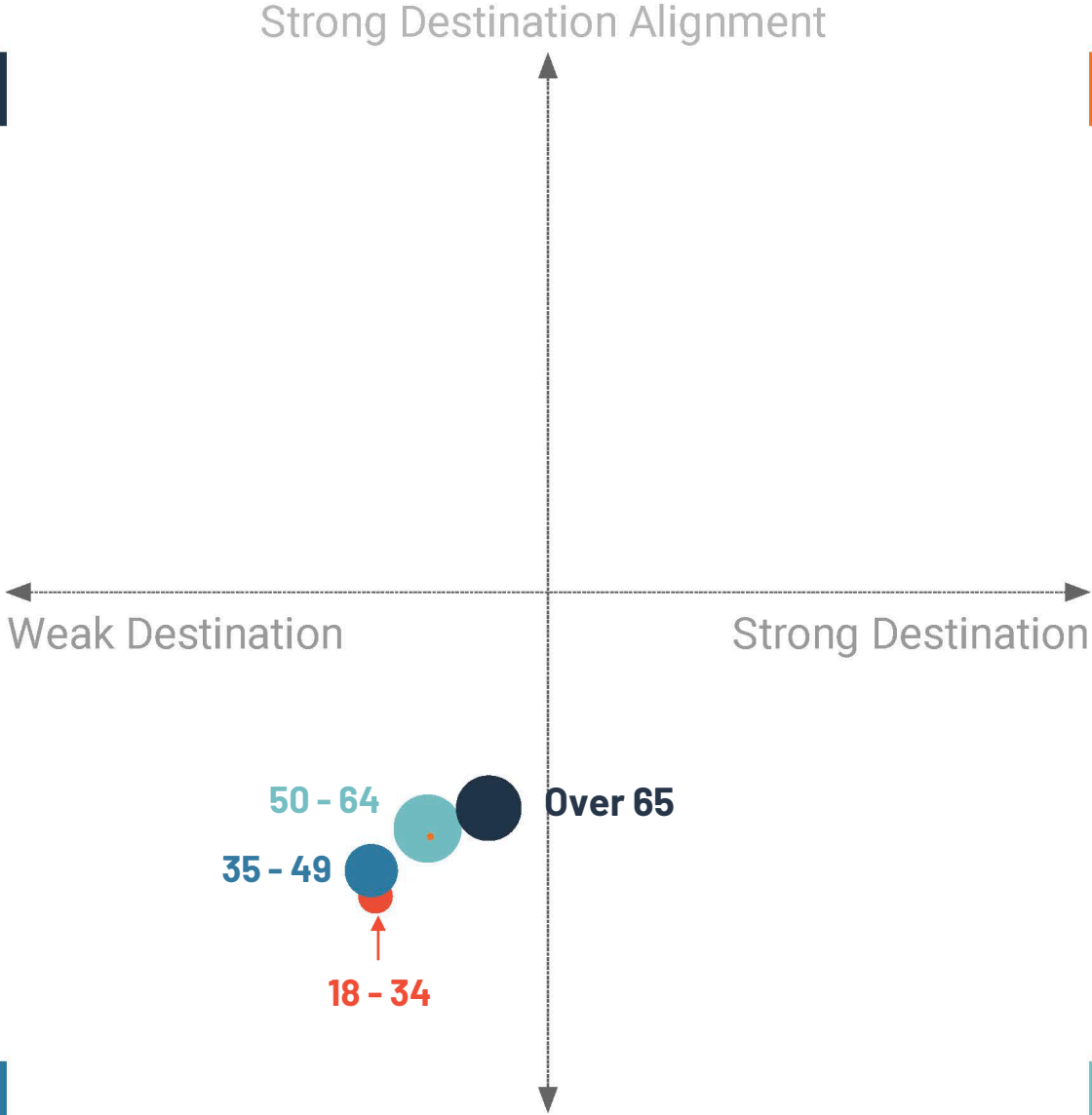
- Overall
- Associations
- Chamber of Commerce
- Community leaders
- Economic Development Board
- Government
- HTA Board of Directors
- HTA Industry Partners
- HTA Staff

Explorers

Mountaineers

Voyagers

Trailblazers



Explorers

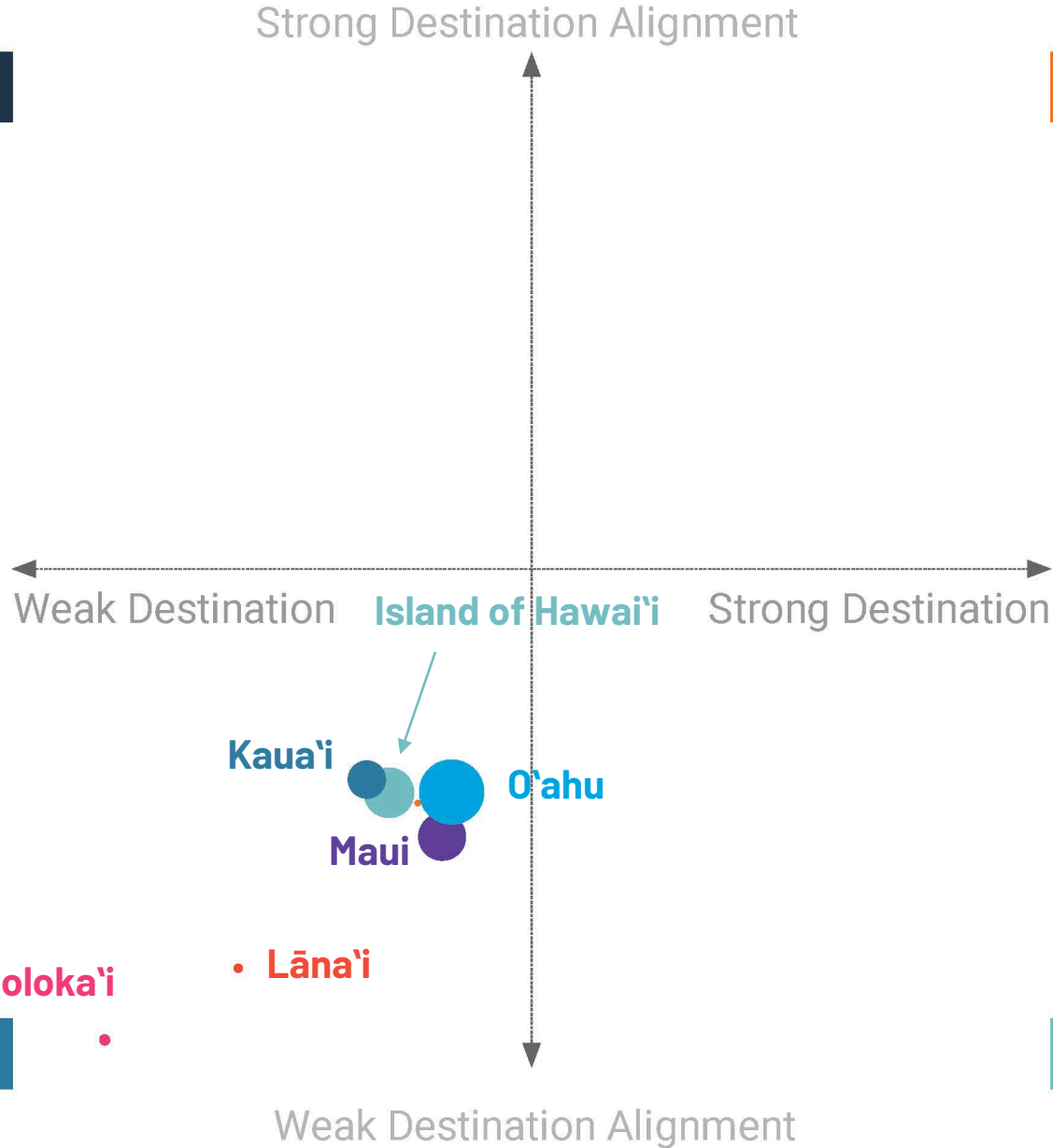
Mountaineers

Weak Destination Alignment

Location

Voyagers

Trailblazers



- Island of Hawai'i
- Kaua'i
- Lāna'i
- Maui
- Moloka'i
- Overall
- O'ahu

Explorers

Mountaineers

Destination Strength

Variable	Relative Importance (0-100%)		Perceived Performance (1 - 5 scale)	
	Industry	Destination	Industry	Destination
Destination Access	8.07%	8.47%	3.33	3.13
Attractions & Experiences	8.97%	8.47%	3.72	4.20
Arts, Culture & Heritage	8.28%	8.47%	3.72	3.54
Outdoor Recreation	8.59%	8.47%	3.98	4.04
Dining, Shopping & Entertainment	8.60%	8.47%	3.61	3.29
Events & Festivals	8.29%	8.47%	3.73	3.30
Health & Safety	8.28%	8.47%	3.31	2.87
Accommodation	8.74%	8.47%	3.66	3.34
Sporting Events	8.03%	8.47%	3.49	2.50
Communication Infrastructure	8.34%	8.47%	3.24	2.88
Conventions & Meetings	8.00%	7.63%	3.42	3.50
Local Mobility & Access	8.23%	7.63%	3.06	2.35

Green indicates destination performance +5% above industry average; red indicates -5% below.

	Industry Average	Destination
Destination Strength	3.52	3.21

Scenario: Explorers

Destination Strength: Performance Change

	Variable	2022	2019
1.	Destination Access	3.13	2.97
2.	Attractions & Experiences	4.20	3.53
3.	Arts, Culture & Heritage	3.54	
4.	Outdoor Recreation	4.04	
5.	Dining, Shopping & Entertainment	3.29	
6.	Events & Festivals	3.30	3.44
7.	Health & Safety	2.87	
8.	Accommodation	3.34	3.11
9.	Sporting Events	2.50	3.08
10.	Communication Infrastructure	2.88	2.75
11.	Conventions & Meetings	3.50	3.49
12.	Local Mobility & Access	2.35	2.51

Green indicates performance above prior destination average; red indicates below.

Destination Strength

Opportunities & Challenges

Local Mobility & Access

- Roads cannot handle traffic year-round
- Inadequate parking facilities
- Not bike/walk friendly

Destination Access

- Airport infrastructure
- Public transit options to the Airport

Health & Safety

- Homelessness, crime & litter

Sporting Events

- Venues for amateur and professional sporting events
- Financial support for sporting events

Accommodation

- Short-term rentals impede quality of life

Dining, Shopping & Entertainment

- Dynamic nightlife

Communication Infrastructure

- Broadband capacity & free Wi-Fi-Access in public areas

Destination Alignment

Variable	Relative Importance (0-100%)		Perceived Performance (1 - 5 scale)	
	Industry	Destination	Industry	Destination
Hospitality Culture	8.42%	8.33%	3.69	3.26
Organization Governance	8.02%	8.33%	3.78	3.04
Funding Support & Certainty	8.51%	8.33%	3.36	2.99
Regional Cooperation	8.27%	8.33%	3.77	3.09
Sustainability & Resilience	8.27%	8.33%	3.49	2.70
Emergency Preparedness	8.17%	8.33%	3.44	2.77
Community Group & Resident S...	8.32%	8.33%	3.52	2.65
Equity, Diversity & Inclusion	8.25%	8.33%	3.71	3.49
Economic Development	8.36%	8.33%	3.96	3.42
Workforce Development	8.42%	8.33%	2.89	2.33
Business Support	8.47%	8.33%	3.87	3.11
Government Support	8.43%	8.33%	3.67	3.10

Green indicates destination performance +5% above industry average; red indicates -5% below.

	Industry Average	Destination
Destination Alignment	3.54	2.94

Scenario: Explorers

Destination Alignment: Performance Change

	Variable	2022	2019
1.	Hospitality Culture	3.26	3.43
2.	Organization Governance	3.04	3.32
3.	Funding Support & Certainty	2.99	3.04
4.	Regional Cooperation	3.09	3.39
5.	Sustainability & Resilience	2.70	
6.	Emergency Preparedness	2.77	
7.	Community Group & Resident Support	2.65	3.19
8.	Equity, Diversity & Inclusion	3.49	
9.	Economic Development	3.42	3.59
10.	Workforce Development	2.33	2.93
11.	Business Support	3.11	3.45
12.	Government Support	3.10	3.14

Green indicates performance above prior destination average; red indicates below.

Destination Alignment

Opportunities & Challenges

Workforce Development

- Affordable housing, daycare, and healthcare options for workers
- Training workforce for hospitality and management positions

Community and Resident Support

- Residents and communities have negative perception of tourism
- DMO values are not aligned with local values

Sustainability & Resilience

- Visitors impede quality of life
- Natural resources and community values are not protected

Funding Support

- Funding sources are not stable and sustainable

Emergency Preparedness

- Lack of comprehensive preparedness plans for crises

Government Support

- Alignment with government policy

Business Support

- Industry profile & support

DMAPs Already Addressing Some Issues



This is a good check-in and confirms what we have already learned through the DMAP process.



A number of areas that have been identified by DNEXT as needing improvement are already being addressed by DMAP actions.



What do we want to see these scores be in 2024?



What will it take to move our scores?

Q&A

DESTINATION
N→**EXT**

Thank you

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