



BRAND STANDING COMMITTEE

OCTOBER 12, 2023



Messaging Research

Messaging Development & Ongoing Efficacy – 3 waves

- March 2021
- November 2021
- December 2022

Messaging Effectiveness – 2 waves

- April 2023
- July 2023

Messaging Development & Ongoing Efficacy

- **March 2021**
- November 2021
- December 2022

Messaging Development & Ongoing Efficacy - March 2021

Questionnaire

Everyone knows Hawai'i has pristine beaches, breathtaking natural beauty and a welcoming aloha spirit. This is more than an invitation to visit Hawaii. This is an invitation to reconnect. To rethink how we all travel. By slowing down. And really getting to know a place and its people.

On your next trip to Hawai'i, what if you could spend part of a day helping locals and their community organizations mālama, or care for, this place just as they do. Options are numerous and include helping community farms, native plant re-forestation projects, ocean-health beach and reef initiatives, or helping create a Hawaiian quilt for elders in the community, among many others. You'll have an incredible and meaningful experience working side-by-side with the people of Hawai'i helping them sustain the pristine natural beauty of their islands.

Q6. Does this statement make you more or less likely to want to visit Hawai'i or it made no difference?

- More
- Less
- No difference

Q6a. If More, ask, why do you say that? What in particular made you more likely to want to visit?

Q6ab. If Less, ask, why do you say that? What in particular made you less likely to want to visit?

If you so desire, you can also select from over 80 hotels that will provide you with an extra night for free for helping sustain our communities.

Q6x. Does this statement make you more or less likely to want to visit Hawai'i or it made no difference?

- More
- Less
- No difference

Q6xa. If More, ask, why do you say that? What in particular made you more likely to want to visit?

Q6xab. If Less, ask, why do you say that? What in particular made you less likely to want to visit?

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If you so desire, you can also select from over 80 hotels that will provide you with an extra night for free for helping sustain our communities.

6b. Please review the statement again and help us understand which elements make you more likely to want to visit Hawai'i. Please select the "positive" button and then highlight the words or phrases that make you want to visit Hawai'i. If there are any phrases or words that you find confusing, or make you less interested in visiting Hawai'i, you can choose the "negative/uncertain" button and highlight those words and phrases.

Q7. Please indicate how much you agree that this statement...

ROTATE.	Not at all				Very much
Fits with my image of Hawai'i	1	2	3	4	5
Makes me want to visit Hawai'i	1	2	3	4	5
Describes something I am interested in	1	2	3	4	5
Doesn't represent what I want to do on vacation	1	2	3	4	5
Tells me something new about Hawai'i	1	2	3	4	5
Doesn't mention the reasons I want to visit Hawai'i	1	2	3	4	5
Helps me picture myself in Hawai'i	1	2	3	4	5
Makes me wonder what else Hawai'i has to offer	1	2	3	4	5
Shows a side of Hawai'i that is surprising or unexpected	1	2	3	4	5

Everyone knows Hawai'i has pristine beaches, breathtaking natural beauty and a welcoming aloha spirit. This is more than an invitation to visit Hawaii. This is an invitation to reconnect. To rethink how we all travel. By slowing down. And really getting to know a place and its people.

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Q8. Which of the following would you do in response to the statement about Hawai'i? [ROTATE]

- Go to the official Hawai'i travel website
- Look up Hawai'i on third-party websites such as TripAdvisor or vacation planning site
- Use a search engine like Google to explore visiting Hawai'i
- Request an official Visitor's Guide
- Ask friends or family about past experiences visiting Hawai'i
- None of the above

Q9. How would you rate Hawai'i as a place to visit?

- Excellent

Everyone knows Hawai‘i has pristine beaches, breathtaking natural beauty and a welcoming aloha spirit. This is more than an invitation to visit Hawai‘i. This is an invitation to reconnect.

To rethink how we all travel. By slowing down. And really getting to know a place and its people.

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Messaging Development & Ongoing Efficacy - March 2021

Reaction to Statement

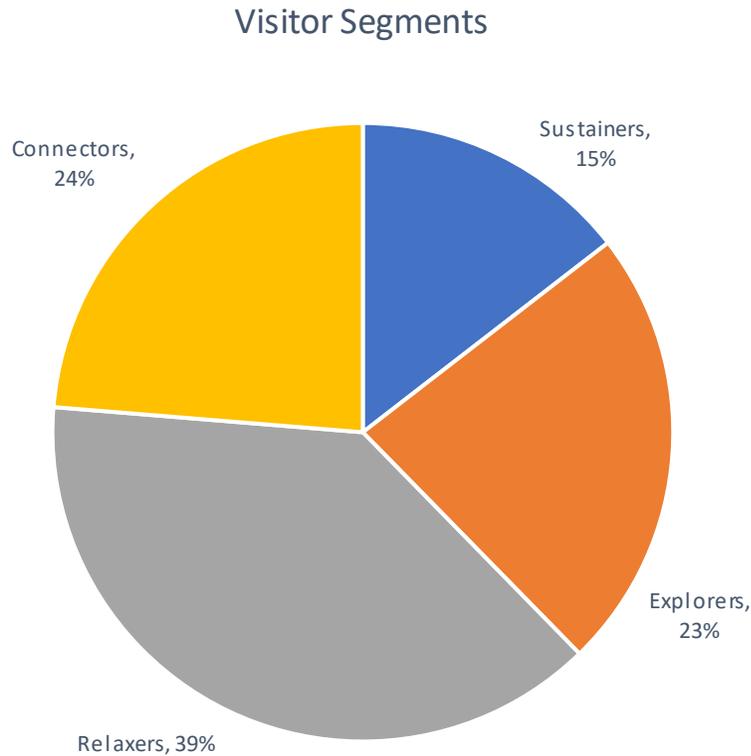
Does this statement make you more or less likely to want to visit Hawai'i or it made no difference?

	Mālama		
	Overall	West	Rest of US
More	62%	66%	58%
Less	4%	2%	5%
No Difference	34%	32%	37%

- Reaction to the statement is positive overall, and slightly more positive in the Western US.
- There is almost no negative reaction to the statement, although those who said it made them less likely to visit generally indicated that they go on vacation to relax – not to work/help the community.
- These findings indicate that the concept is appealing to past visitors.

Messaging Development & Ongoing Efficacy - March 2021

Understanding Visitors



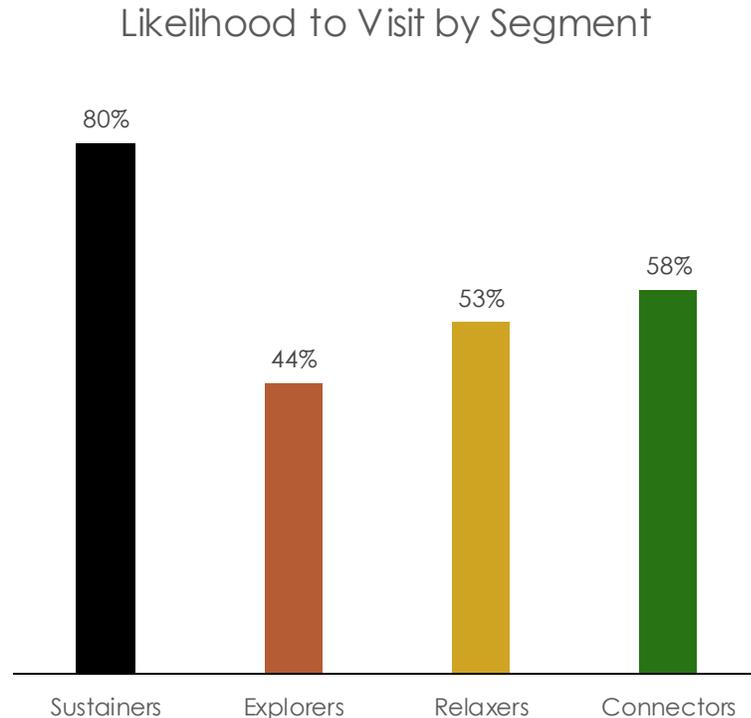
Using the motivations for destination selection, along with activities, visitors can be divided into four groups:

- Relaxers (39%) – they want to be in a safe destination, where they can get away from it all and lie on the beach.
- Connectors (24%) – this group wants to connect with both the local people and the place. They care about participating in cultural activities, as well as giving back to the destination.
- Explorers (23%) – this group is focused on getting off the beaten path and finding new, undiscovered activities. They are less interested in sustainability.
- Sustainers (15%) – this group is focused on nurturing natural resources and giving back. They want to sustain the local culture, as well as the local natural resources.

The following provides more detail on each of these segments.

Messaging Development & Ongoing Efficacy - March 2021

Potential Visitation Varies By Segment



Calculated likelihood = 100% of those already planning
+80% of those very likely and 20% of those somewhat likely

- While the appeal of the destination is strong across segments, there is much more variation when likelihood to visit is considered.
- Likelihood is strongest among the Sustainers, with 80% indicating intent to visit in the next year. Explorers are the least likely, with only 44% indicating intent, with Relaxers and Connectors both over 50%.
- It is noteworthy that Sustainers are already quite interested in visiting Hawai'i and therefore ensuring interest from other segments is also important.

Messaging Development & Ongoing Efficacy - March 2021

Targeting

- Visitors to Hawai'i vary in their motivations for visiting the state – and in terms of what they are looking for when on vacation. While the largest segment **Relaxers (39%)** want relaxation and beach time, the remaining **61%** are looking for **something different**. Only 15% are truly focused on sustainability (Sustainers), but the two other segments – Explorers and Connectors want **meaningful experiences** while on vacation. Explorers are more focused on new and **unique experiences**. Connectors are interested in creating connections with the locals and **with local culture**.
- The good news is that **three of the four segments have a strong positive reaction to the Mālama concept, and all report an increased likelihood to visit after viewing the statement**. In implementation it will be important to highlight opportunities to practice sustainability, while learning something new and connecting with locals. This focus allows the message to speak to all three segments and increase their interest in visiting.
- While the sustainability message is important, Sustainers are already going to visit Hawai'i, so reaching Explorers and Connectors is even more important. These two segments of past visitors are less likely to indicate that they are likely to visit in the next year, so providing them with new information and a meaningful message increases their interest and will help drive repeat visitation.
- It will also be critical to have the pristine natural beauty of the destination as the backdrop for the messaging. This natural beauty appeals across segments and reminds consumers of attributes that differentiate Hawai'i from the competition. **As long as the natural beauty is included, this message will work across segments, including Relaxers and reinforce their existing interest in the destination.**

Messaging Development & Ongoing Efficacy

- March 2021
- **November 2021**
- December 2022

Messaging Development & Ongoing Efficacy - November 2021

Reaction to Videos

Does this video make you more or less likely to want to visit Hawai'i or it made no difference?

	Aquaculture	Habitat	Reforestation	Farm
More	53%	58%	59%	56%
Less	5%	3%	1%	6%
No difference	43%	39%	40%	38%

- Reaction to the videos is positive overall, with very few indicating that the videos make them less likely to want to visit Hawai'i.
- Surprisingly, 72% indicated that they were at least somewhat interested in one of the activities shown, with 47% indicating that they were "very interested" in one of the activities.

Across the four videos, 65% of consumers indicated that at least one of the videos made them more likely to visit.

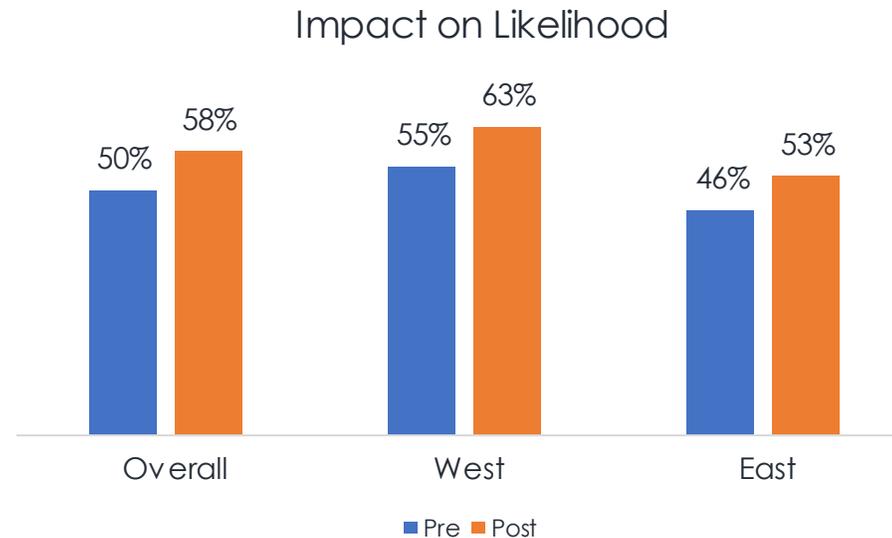
Messaging Development & Ongoing Efficacy - November 2021

Impact of Videos – East and West

The videos resulted in a strong lift in likelihood to visit

Likelihood increased 8 points overall (16% lift), with nearly the same impact for both the West and the East.

How likely are you to visit Hawai'i for a leisure trip between now and the end of 2022?



Calculated likelihood – 100% of already planning, 80% of very likely & 20% of somewhat likely

Messaging Development & Ongoing Efficacy - November 2021

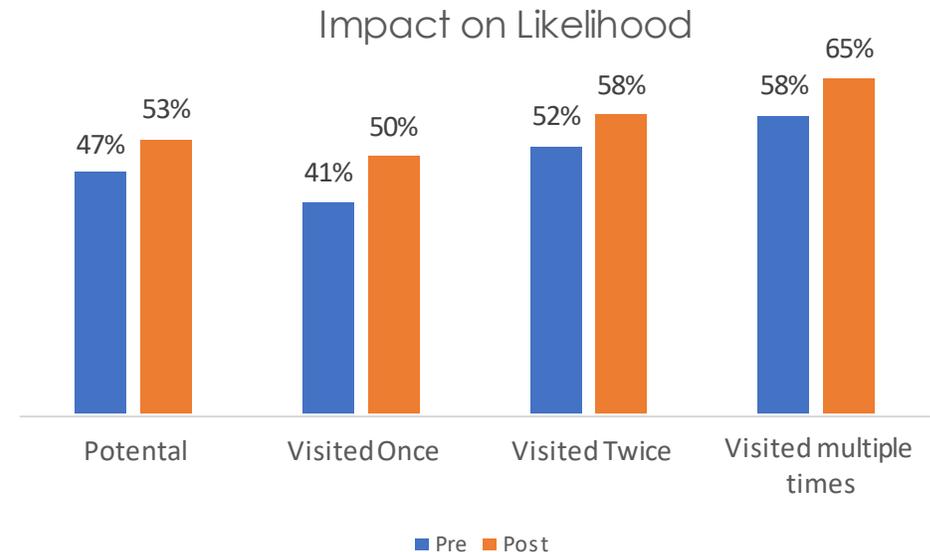
Impact of Videos

The videos result in a strong lift in likelihood to visit regardless of past visitation to Hawai'i.

Likelihood among potential visitors increased 6 points after viewing the videos.

The strongest lift is among those who have only visited Hawai'i once in the past (9% points), but there is still strong lift among more frequent past visitors.

How likely are you to visit Hawai'i for a leisure trip between now and the end of 2022?



Calculated likelihood – 100% of already planning, 80% of very likely & 20% of somewhat likely

Messaging Development & Ongoing Efficacy - November 2021

Segments

A factor analysis was used to group the attributes that were most closely related, and respondents were then classified by the set of attributes of most importance to them.

SUSTAINERS: These travelers place the highest value on volunteer opportunities, giving back, sustainability and connecting with locals.

RELAXERS: Want to relax, escape and enjoy beautiful scenery.

INDULGERS: For this group, vacations are for enjoying food, entertainment and luxury experiences.

ENGAGERS: The most interested in connecting with locals and exploring new things.

Sustainers	Relaxers	Indulgents	Engagers
Voluntourism opportunities	To relax and get away from it all	Many restaurants and different culinary options	To explore new things
The ability to give something back to the destination	Escaping everyday stress and just being able to relax	Diverse selection of amenities such as lots of shopping, attractions and restaurants	Opportunity to experience unique cultural experiences
A destination that practices sustainability	Beautiful scenery	Luxury accommodations and experiences	A destination that cares about its natural and cultural resources
Being able to personally connect with locals at the destination	A safe place	Nightlife and entertainment	
To be outdoors experiencing nature	Beautiful beaches		

Messaging Development & Ongoing Efficacy

- March 2021
- November 2021
- **December 2022**

Messaging Development & Ongoing Efficacy –December 2022

Background

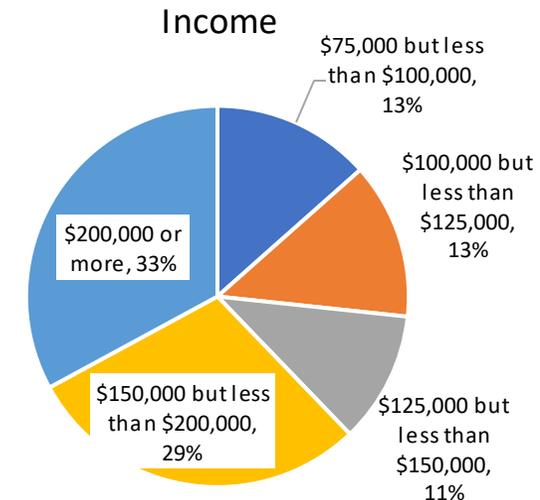
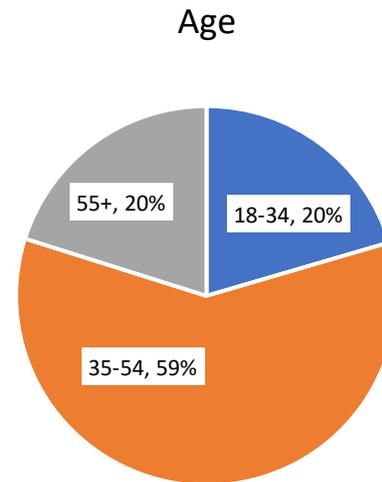
- The Hawai'i Visitors & Convention Bureau (HVCB) partnered with Strategic Marketing & Research Insights (SMARInsights) in 2021 to garner consumer reaction to the Mālama concept among a qualified target audience of past visitors. This research was conducted in two waves and provided insights that helped to shape the development of the Mālama video content.
- The research conducted in 2022 repeated the second wave of research to evaluate whether consumer attitudes regarding the Mālama videos shifted as travel returned to normal.
- A quantitative survey was conducted among qualified consumers to assess reaction to the creative, including a measurement of likelihood to visit before and after viewing the videos.
- Respondents rated the videos using a tool that collected moment-to-moment reactions to assess the relative appeal of each scene.
- A follow-up video survey will gather qualitative feedback to further illuminate the quantitative findings.

Messaging Development & Ongoing Efficacy –December 2022

Sample

- There were 1,111 completed surveys: 522 in the western markets and 589 in the eastern. Survey participants had either visited Hawai'i in the past 10 years or are likely to visit in the next 5 years.
- Participants were also qualified by income and other screeners. The data was weighted by age to provide comparability to the 2021 data.
- The mindfulness questions were changed to align with MRI media buying resources. A copy of the questionnaire with the full list of screeners is included in the appendix.

Number of Visits			
	West	East	Total
Never	11%	25%	18%
Once	27%	32%	30%
Twice	21%	23%	22%
Three+	41%	20%	30%



Messaging Development & Ongoing Efficacy –December 2022

Segments

In the 2021 study, a factor analysis was used to group the attributes that were most closely related, and respondents were then classified by the set of attributes of most importance to them. These segments were applied to the 2022 data.

SUSTAINERS: These travelers place the highest value on volunteer opportunities, giving back, sustainability and connecting with locals.

RELAXERS: They want to relax, escape and enjoy beautiful scenery.

INDULGERS: For this group, vacations are for enjoying food, entertainment and luxury experiences.

ENGAGERS: They are most interested in connecting with locals and exploring new things.

Sustainers	Relaxers	Indulgors	Engagers
Voluntourism opportunities	To relax and get away from it all	Many restaurants and different culinary options	To explore new things
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Being able to personally connect with locals at the destination	A safe place	Nightlife and entertainment	
To be outdoors experiencing nature	Beautiful beaches		

Messaging Development & Ongoing Efficacy –December 2022

Insights

- Hawai'i continues to dominate competing destinations with 93% of targeted consumers rating it a good or excellent place to visit. Only Europe garners similarly high ratings.
- Likelihood to visit Hawai'i in the next year has dropped 10 points. The 2021 study was conducted during pandemic-related travel restrictions when pent-up demand was quite high. Many competing destinations had even longer-lasting restrictions. Travel intent has normalized following the wave of pent-up demand.
- Reactions to the Mālama videos are even more positive than a year ago, with a 7-point increase in “shows the reasons I want to visit Hawai'i” and a 6-point increase in representing what consumers want to do on vacation. The videos are especially effective at conveying that the people of Hawai'i are welcoming to visitors.
- The Mālama videos lift the likelihood of visiting by 14 points. Sustainers are the most likely to visit, but each segment posts a lift in likelihood after viewing the videos.
- Voluntourism and sustainability are trending. While still less important than beautiful scenery and relaxation, these attributes have gained importance in the past year.

Messaging Development & Ongoing Efficacy –December 2022

Reaction to the Videos

Reaction to the videos is positive overall, with a majority indicating the videos made them more interested in visiting.

- Video survey responses indicated that interest is already high for many of those who said the Mālama videos had no impact. They were favorable about the content but are already planning to return.
- On average, 80% said they were interested in doing an activity that was shown in the video – up from 72% last year.

	Aquaculture	Habitat	Reforestation	Farm
More interested	58%	65%	61%	58%
Somewhat or very interested in doing an activity shown in the video	82%	82%	80%	77%

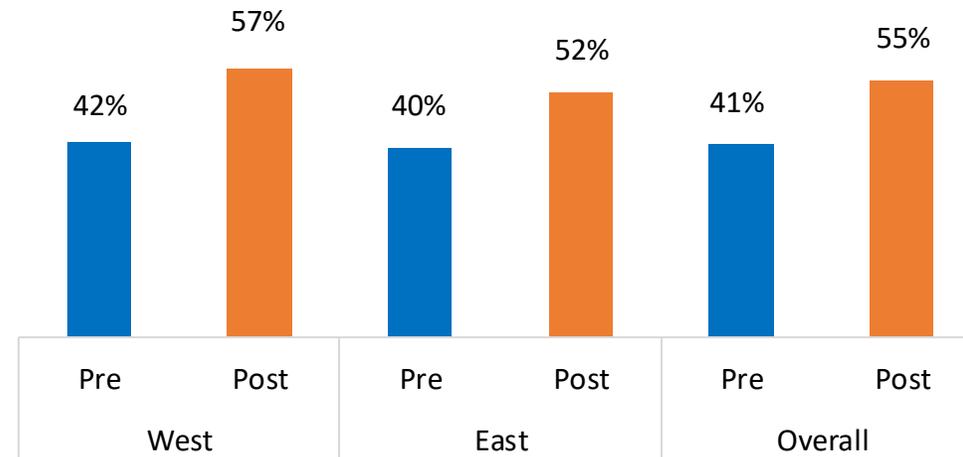
Messaging Development & Ongoing Efficacy –December 2022

Impact of Videos - East and West

The videos result in a strong lift in likelihood to visit.

Overall, likelihood to visit increased 14 points after viewing the videos (34% lift). The effect is similar in the West and East.

Likelihood to Visit in Next Year
by Market



Calculated likelihood – 100% of already planning, 80% of very likely & 20% of somewhat likely

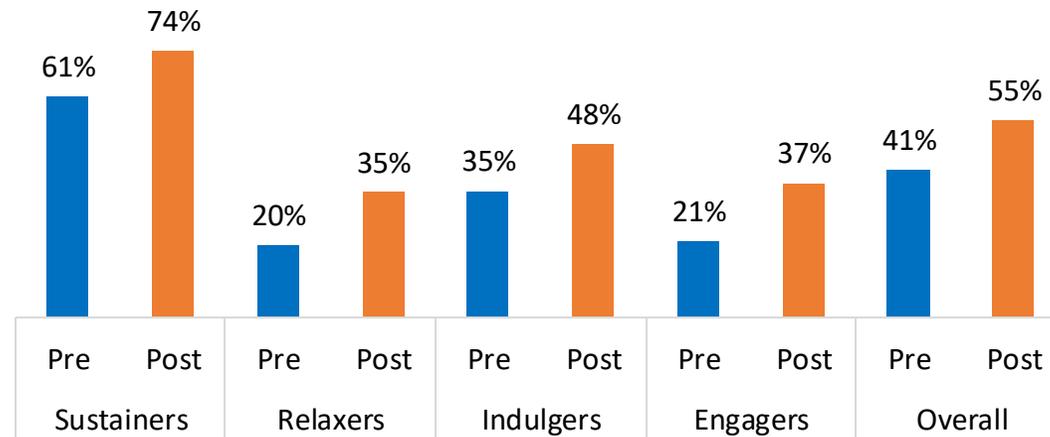
Messaging Development & Ongoing Efficacy –December 2022

Impact of Videos by Segment

Sustainers are the most likely to visit.

The videos lift likelihood for every segment.

Likelihood to Visit in Next Year
by Segment



Calculated likelihood – 100% of already planning, 80% of very likely & 20% of somewhat likely

Messaging Effectiveness

- **April 2023**
- July 2023

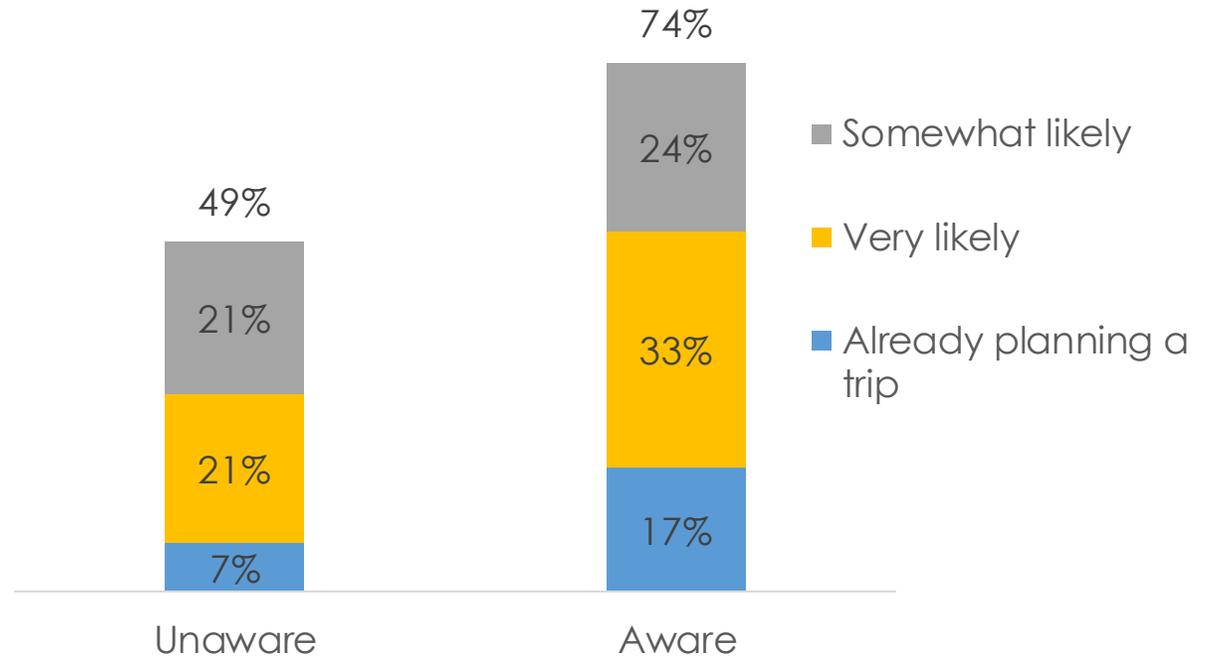
Messaging Effectiveness—April 2023

Lift in Likelihood to Visit

Ad-aware consumers are more likely to visit in the next year.

The campaign influenced a 10-point lift in travelers already planning a trip to Hawai'i and a 12-point lift in those very likely to visit.

Likelihood to Visit in Next Year



Messaging Effectiveness

- April 2023
- **July 2023**

Messaging Effectiveness—July 2023

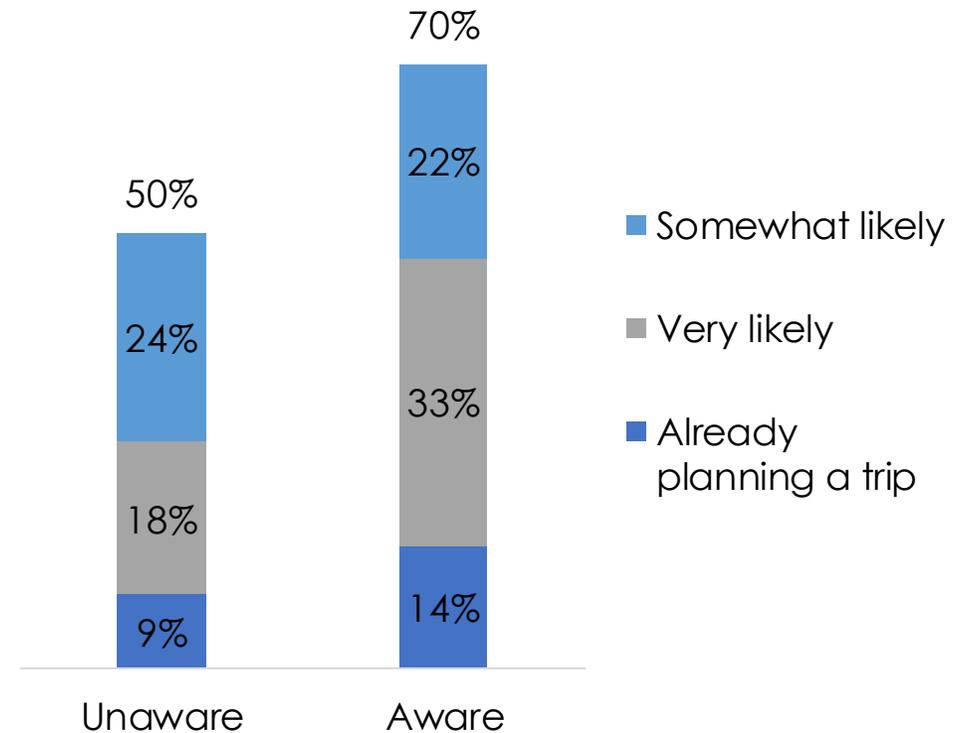
Lift in Likelihood to Visit

Ultimately, the measure of impact or effectiveness will be an incremental travel metric or influenced trips and spending.

Prior to that, the best surrogate is lift in likelihood to visit, where we continue to see a 20-point gain in top two box likelihood among the aware segment.

While not directly projectable into impacts, this large lift in likelihood foreshadows an excellent performance in advertising effectiveness and influenced trips in the final travel wave.

Likelihood to Visit Next Year



Mahalo