

Hawai'i Tourism Authority
2019 Fall Tourism Update

Marketing the Hawaiian Islands in a Sea of Sameness

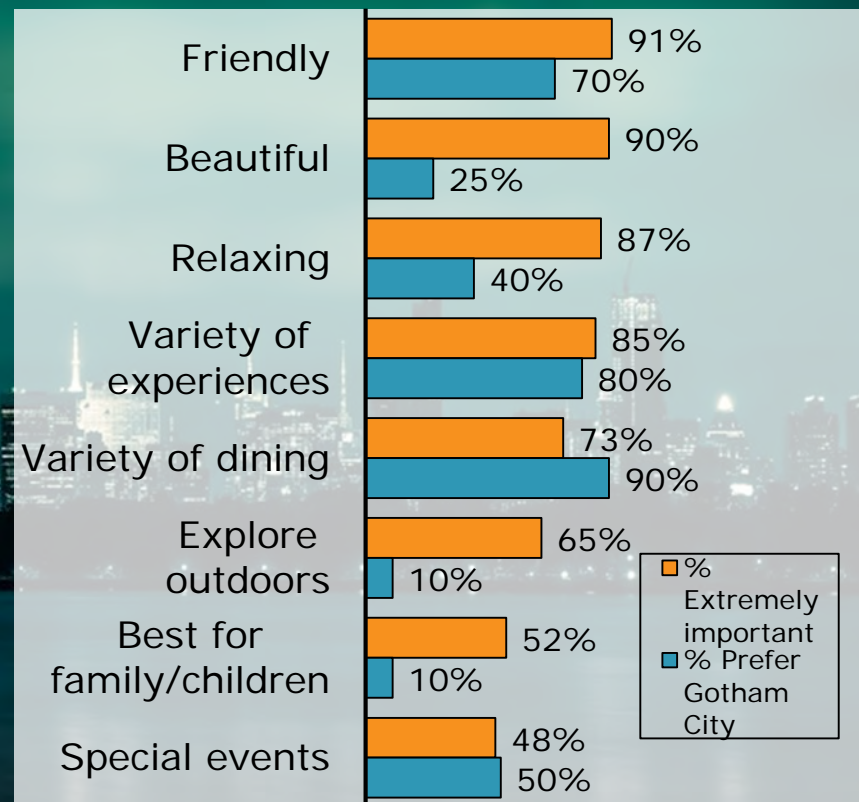
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President

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chriskam@omnitrakgroup.com



Welcome to Gotham City!

Traditional Measures of Destination Branding



“Provide a change of pace”

“Is a place I know I will have a great trip”

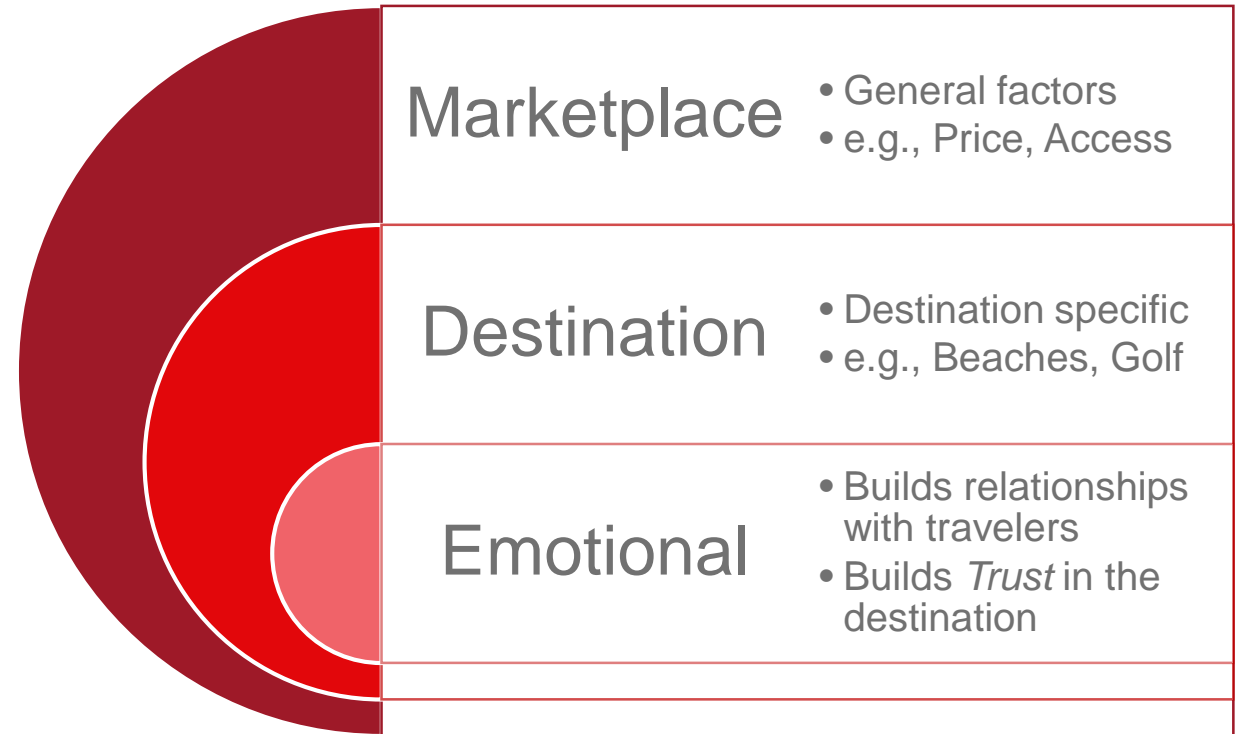
“Offers authentic experiences unlike anywhere else”

“Deepens my family connections”

“Is my go-to destination”

Overview

Destinations have the opportunity to strengthen brand equity and associated travel demand by engaging with targeted travelers at three different levels of destination marketing, including **Marketplace**, **Destination** and **Emotional**.



Key Takeaways: What's the BIG idea?

Destination marketing generally engages travelers with *Marketplace* and *Destination* factor messaging. The opportunity is to break through the *Sea of Sameness* by integrating *Emotional* factors into marketing messaging to build Relationships (emotional connections) and Trust in the destination.

- 1.** **It's a Matter of Trust, Trust me!:** Trust in a destination strengthens brand equity for the destination, and growing this brand equity in turn increases consumers' intent to visit and advocate for (i.e., recommend to friends/family) the destination.
- 2.** **Experience + Service + Relationship = Trust in a Destination:** Factors related to *Experience* (i.e., High Quality, Unique, Readily Accessible), *Service* (Timely/Friendly) and *Relationships* (i.e., Emotional connections, Cares about people, Feel proud to be there) are the key drivers which influence consumers' Trust in a destination.
- 3.** **Experience Makes the Difference, But....:** Destination marketing efforts often focus on aspects of a destination's *Experience*. While *Experience* plays a major role in building a destination's unique brand, brand equity can be further deepened by expanding destination marketing to include messaging oriented around the Service and Relationship (Emotional) aspects of a destination.

Methodology

Target Audience: Random Sample of US, Canada, Japan and Korea Residents

- **US: 1,200 sample**
 - Traveled for leisure by air 500 miles or more in past 12 months with household income of \$75,000 or higher
 - US West includes states of Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming
 - US East includes all continental states not in US West region
- **Canada: 600 sample**
 - Traveled for leisure by air 500 miles or more in past 12 months with household income of \$75,000 CAD or higher
- **Japan: 600 sample**
 - Traveled internationally for leisure in past 24 months with household income of 3,999,000 Yen or higher (~\$40,000 USD)
- **Korea: 600 sample**
 - Traveled internationally for leisure in past 24 months with household income of 30,000,000 or higher (~\$26,000 USD)

Survey Methodology

- **Online surveys** taken by LightSpeed Research panelists

Timeframe

- HTA Marketing Effectiveness Study
Wave 2: Data collection
June - August 2019

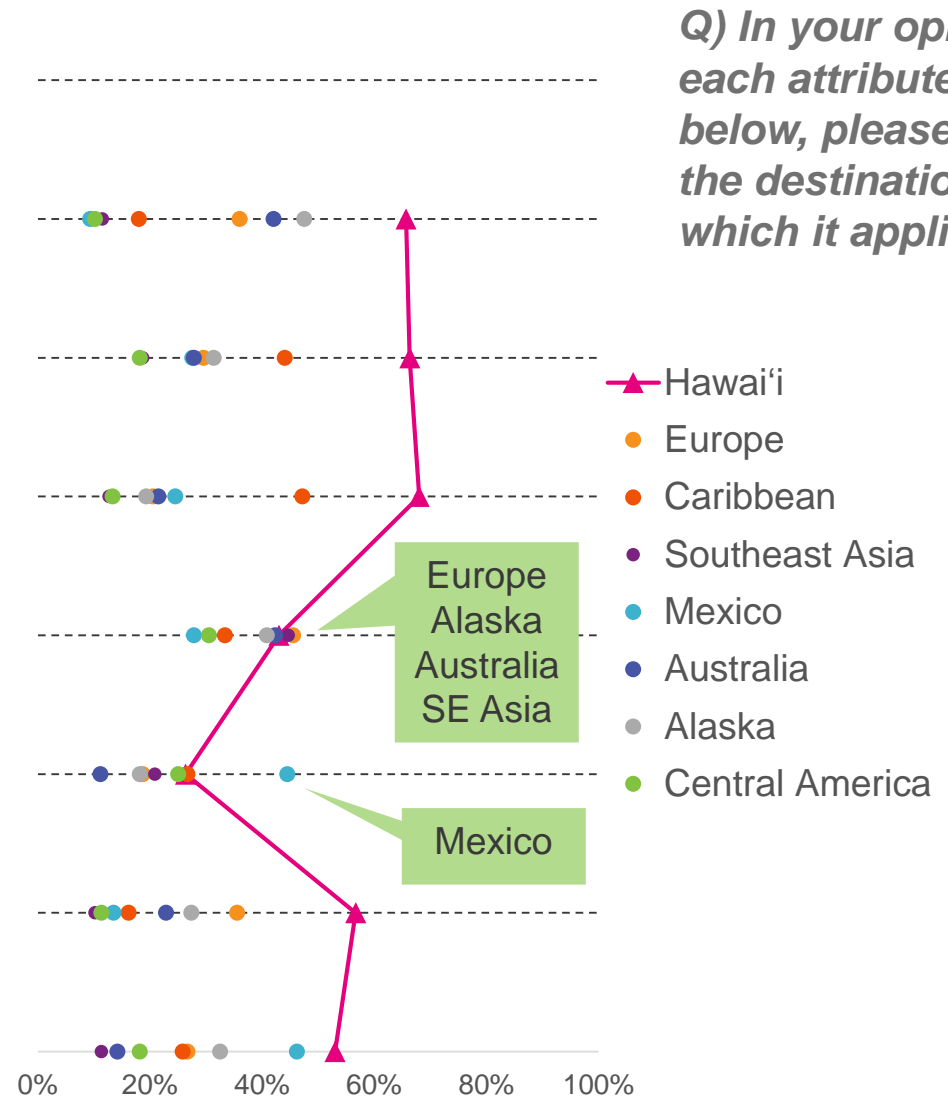
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U.S. Market

Marketplace Attributes – Hawai‘i vs Competitor Destinations – US West

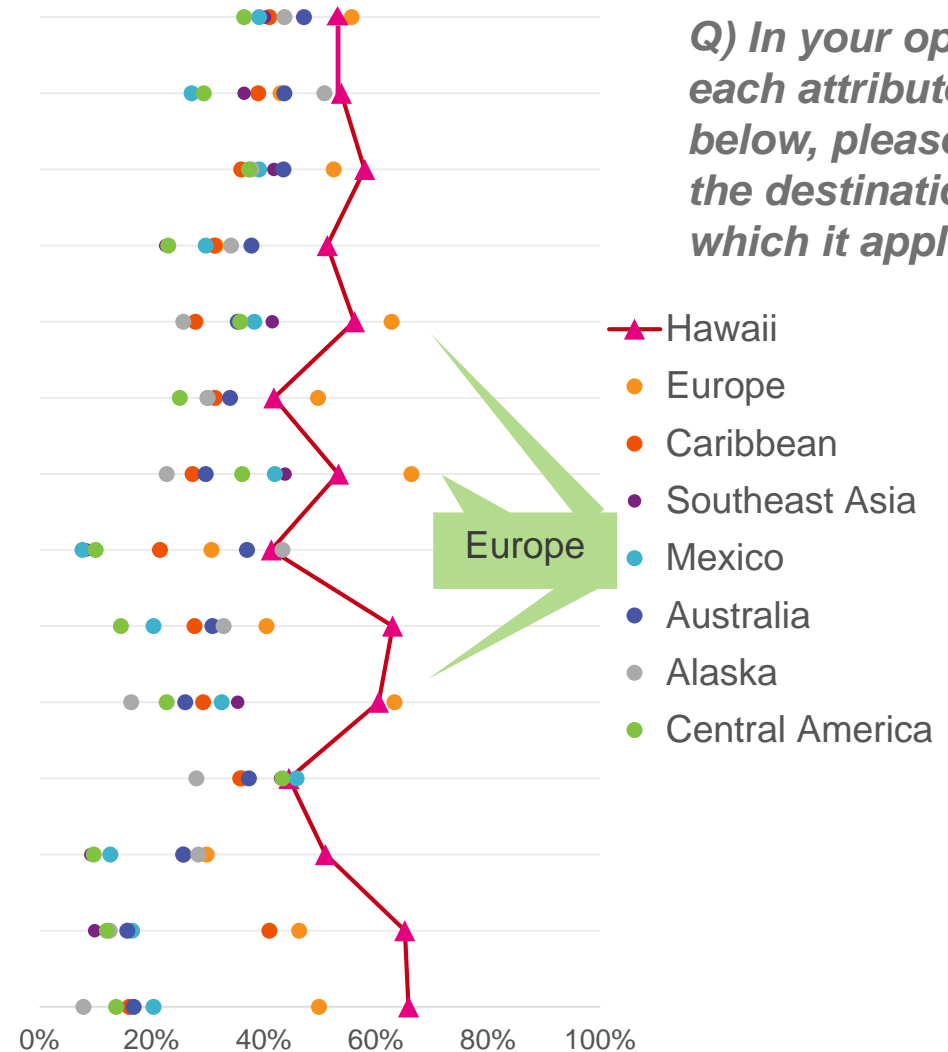
Marketplace Attribute	Importance Ranking
-----------------------	--------------------

Safe & secure	78%
Great place to get away from it all	77%
Relaxing, place to unwind	76%
Different than other places	75%
Good value for money	73%
Easy to get around	68%
Easy to get there	55%



Destination Attributes – Hawai'i vs Competitor Destinations – US West

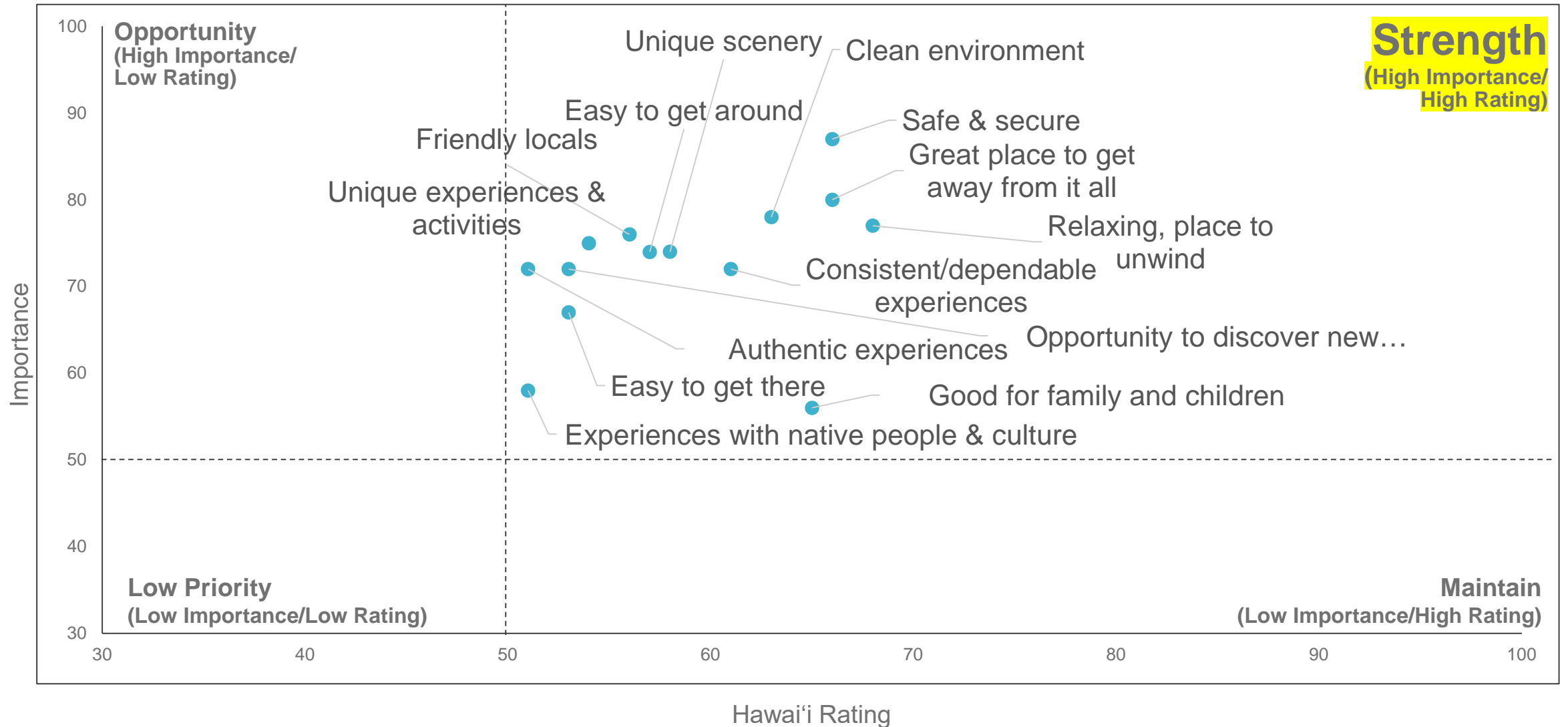
Destination Attribute	Importance Ranking
Unique experiences & activities	79%
Unique scenery	78%
Authentic experiences	76%
Friendly locals	75%
Intriguing history & culture	75%
Opp. to discover new activities & experiences	72%
Historic/cultural things to do & see	72%
Clean environment	71%
Consistent/dependable experiences	70%
Quality culinary and dining	68%
Experiences with native people & culture	64%
Good for family and children	53%
Romantic	49%
Great shopping	44%



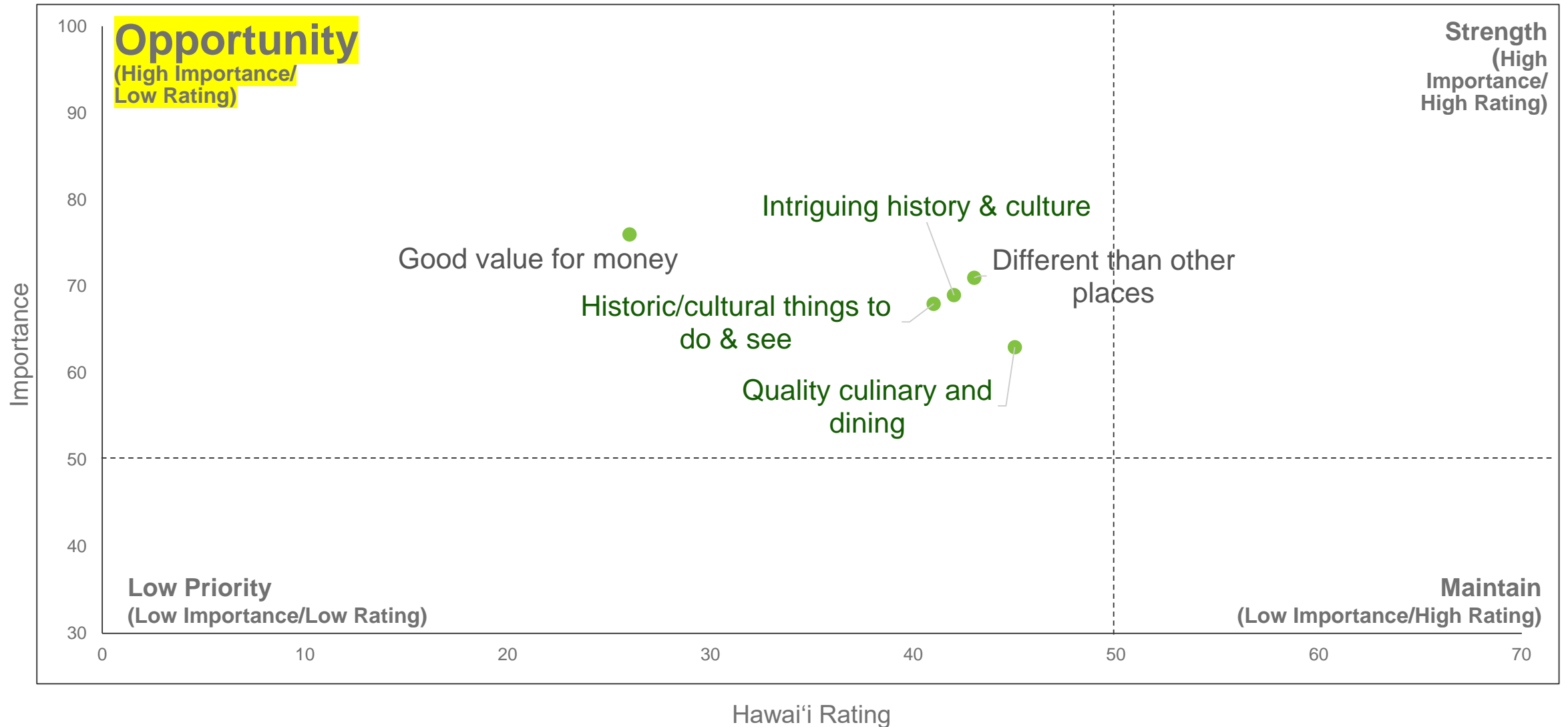
Marketplace & Destination Attributes – Importance vs Hawai‘i Rating – US West



Marketplace & Destination Attributes – Importance vs Hawai‘i Rating – US West



Marketplace & Destination Attributes – Importance vs Hawai‘i Rating – US West



Marketplace Attributes – Hawai‘i vs Competitor Destinations – US East

Marketplace Attribute	Importance Ranking
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Safe & secure

87%

Great place to get away from it all

80%

Relaxing, place to unwind

77%

Good value for money

76%

Easy to get around

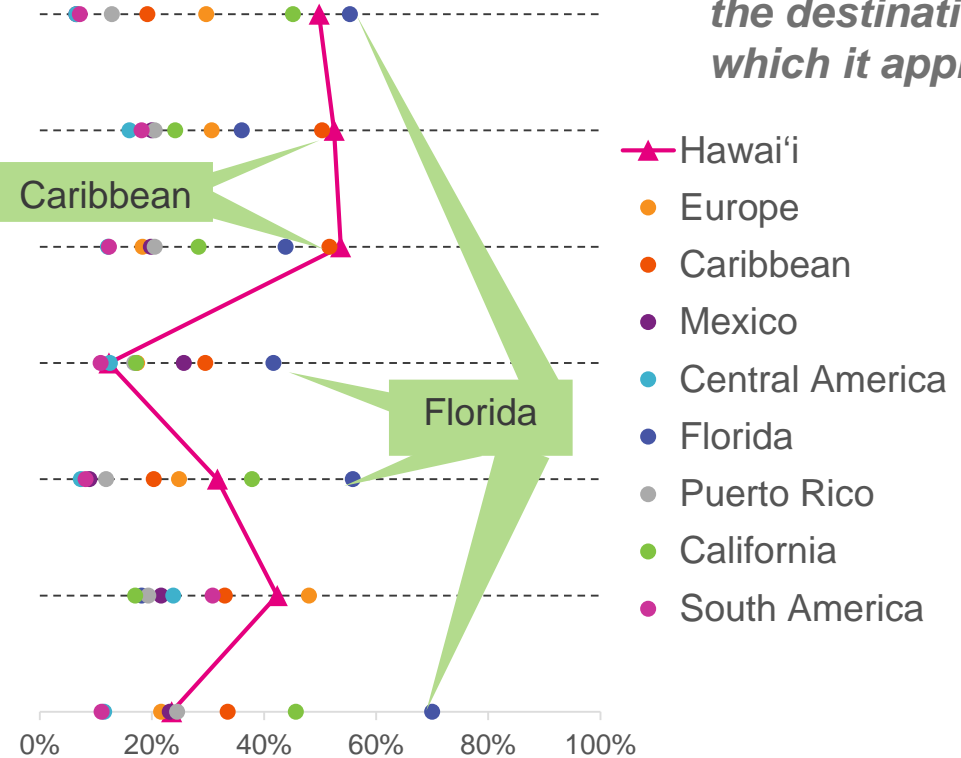
74%

Different than other places

71%

Easy to get there

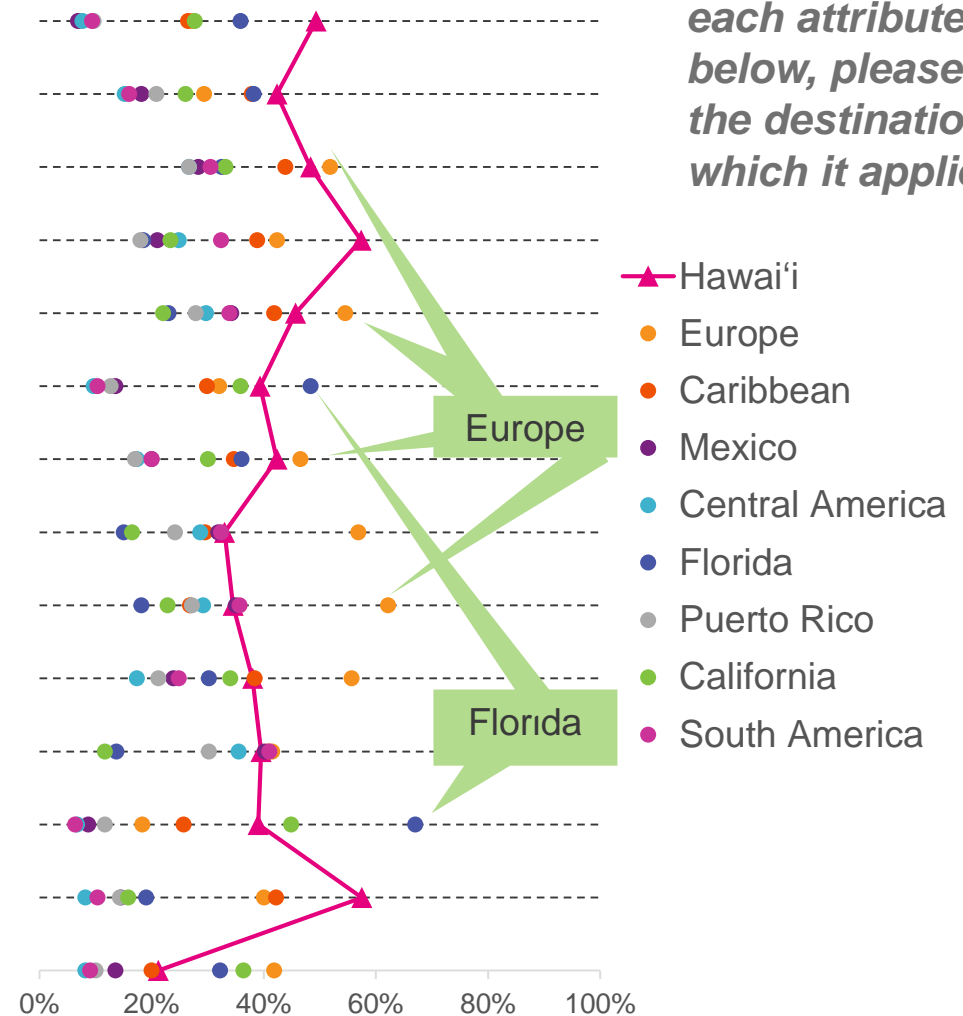
67%



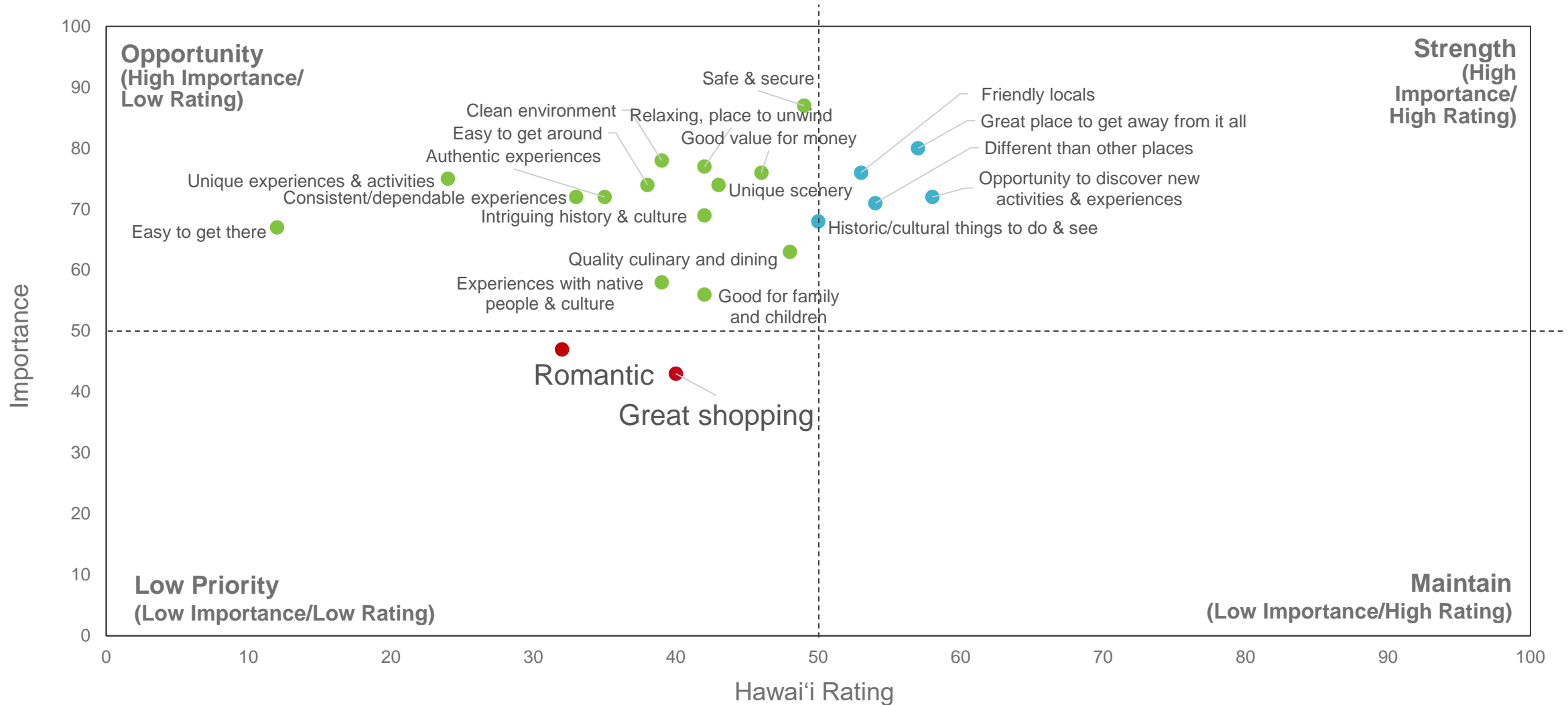
Destination Attributes – Hawai'i vs Competitor Destinations – US East

Destination Attribute	Importance Ranking
-----------------------	--------------------

Clean environment	78%
Friendly locals	76%
Unique experiences & activities	75%
Unique scenery	74%
Authentic experiences	72%
Consistent/dependable experiences	72%
Opportunity to discover new activities & experiences	72%
Intriguing history & culture	69%
Historic/cultural things to do & see	68%
Quality culinary and dining	63%
Experiences with native people & culture	58%
Good for family and children	56%
Romantic	47%
Great shopping	43%



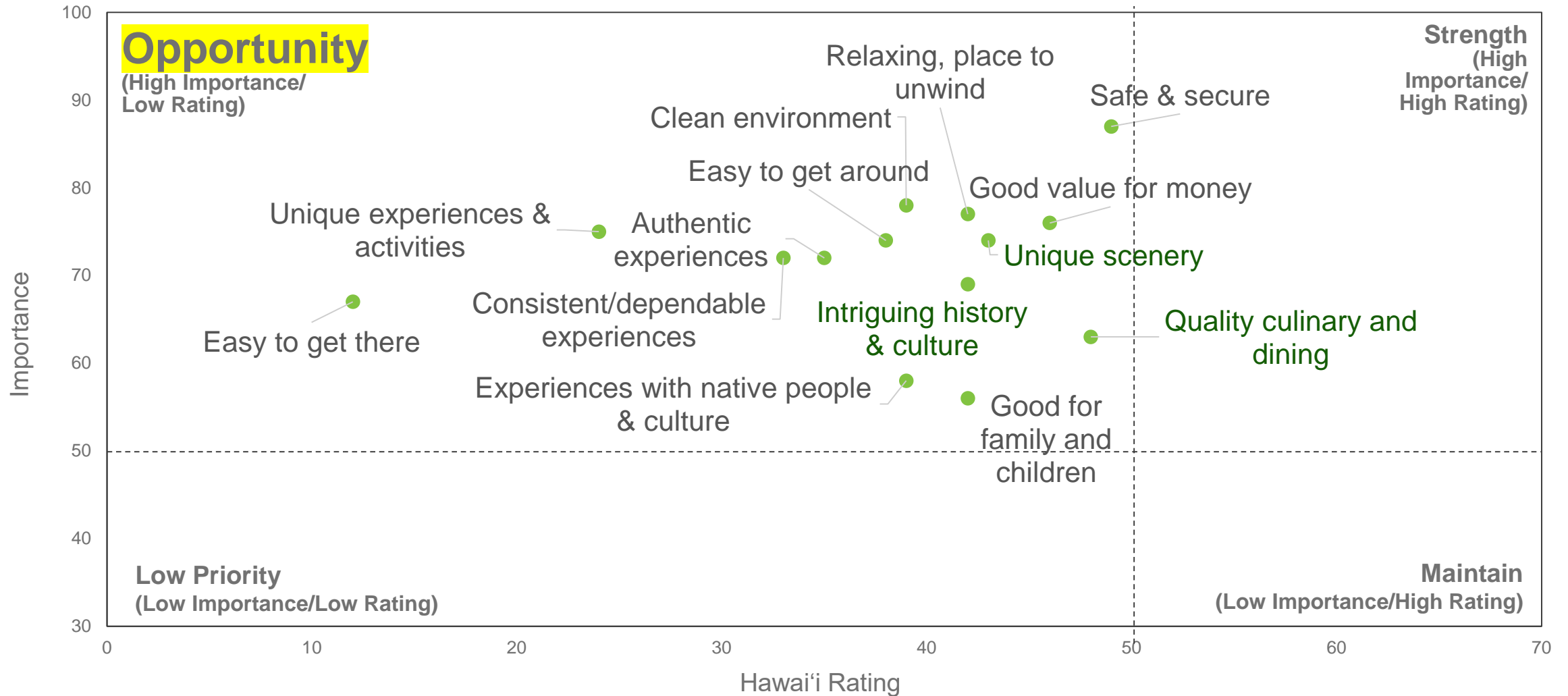
Marketplace & Destination Attributes – Importance vs Hawai‘i Rating – US East



Marketplace & Destination Attributes – Importance vs Hawai‘i Rating – US East



Marketplace & Destination Attributes – Importance vs Hawai‘i Rating – US East

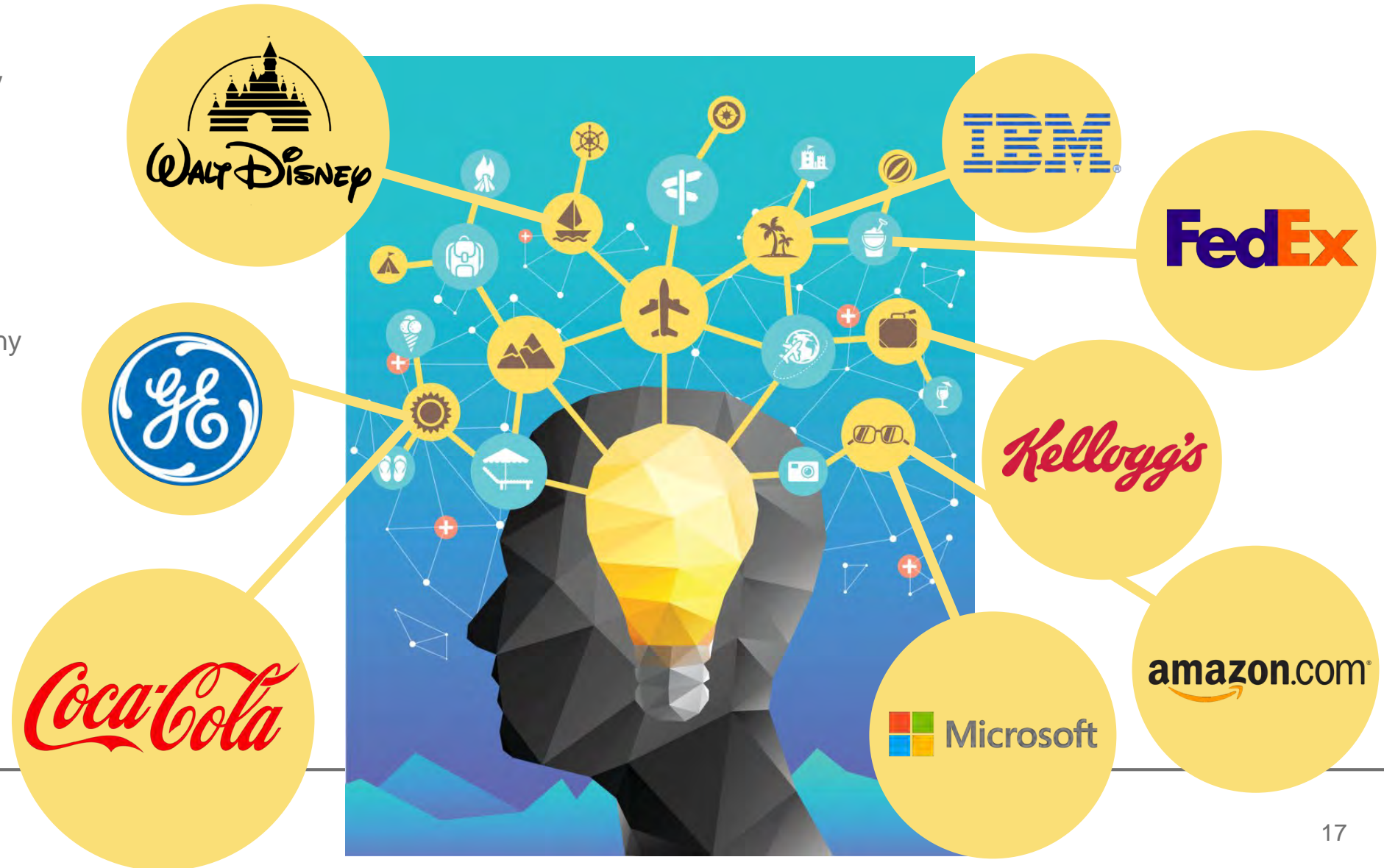


The BrandHeart™ Model

Background History in 30 Seconds

Developed in 2007 in cooperation with Laurie Lang, SVP & founder of Brand Management The Walt Disney Company

Tested with telephone survey of 1,800 U.S. adults, involving 42 brands across 10 industries



The BrandHeart™ Model

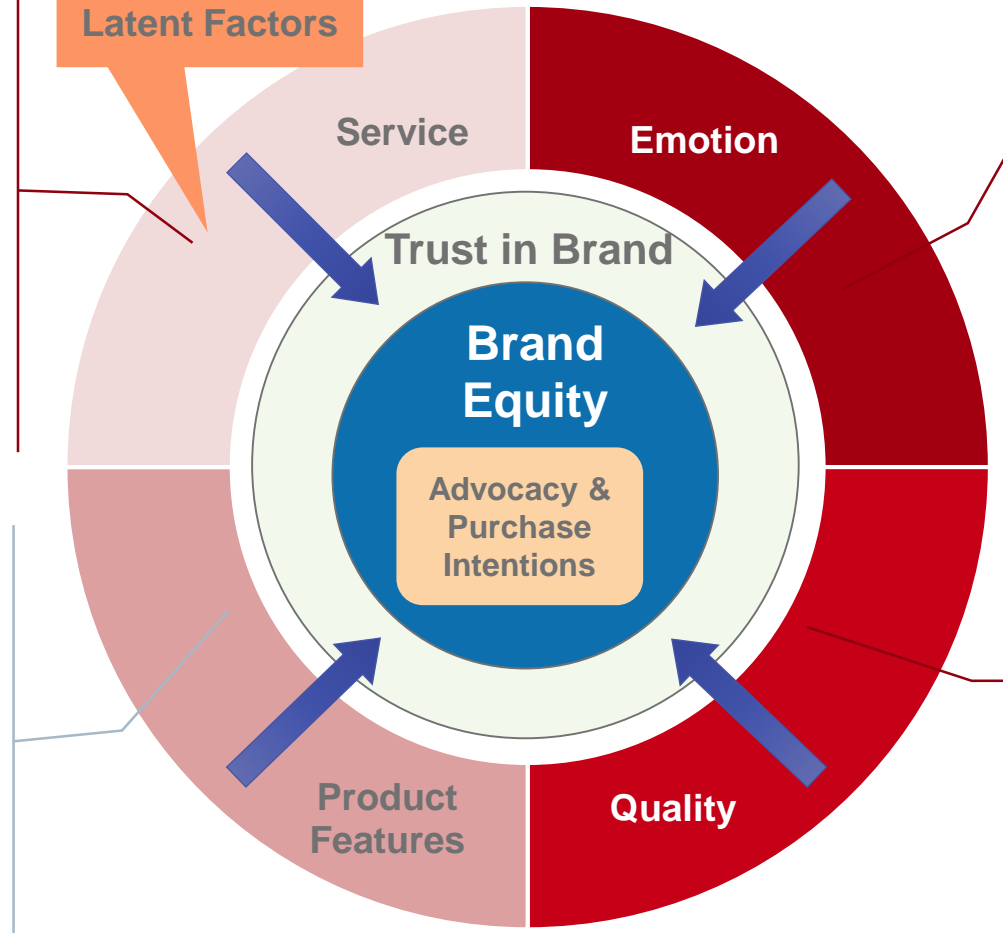
SERVICE ATTRIBUTES

- *Has friendly service*
- *Has timely service*
- *Has courteous employees*
- *Shows it cares about people like me*

PRODUCT ATTRIBUTES

- *Has unique experiences*
- *Has readily accessible experiences*
- *Has the latest technology*

Latent Factors



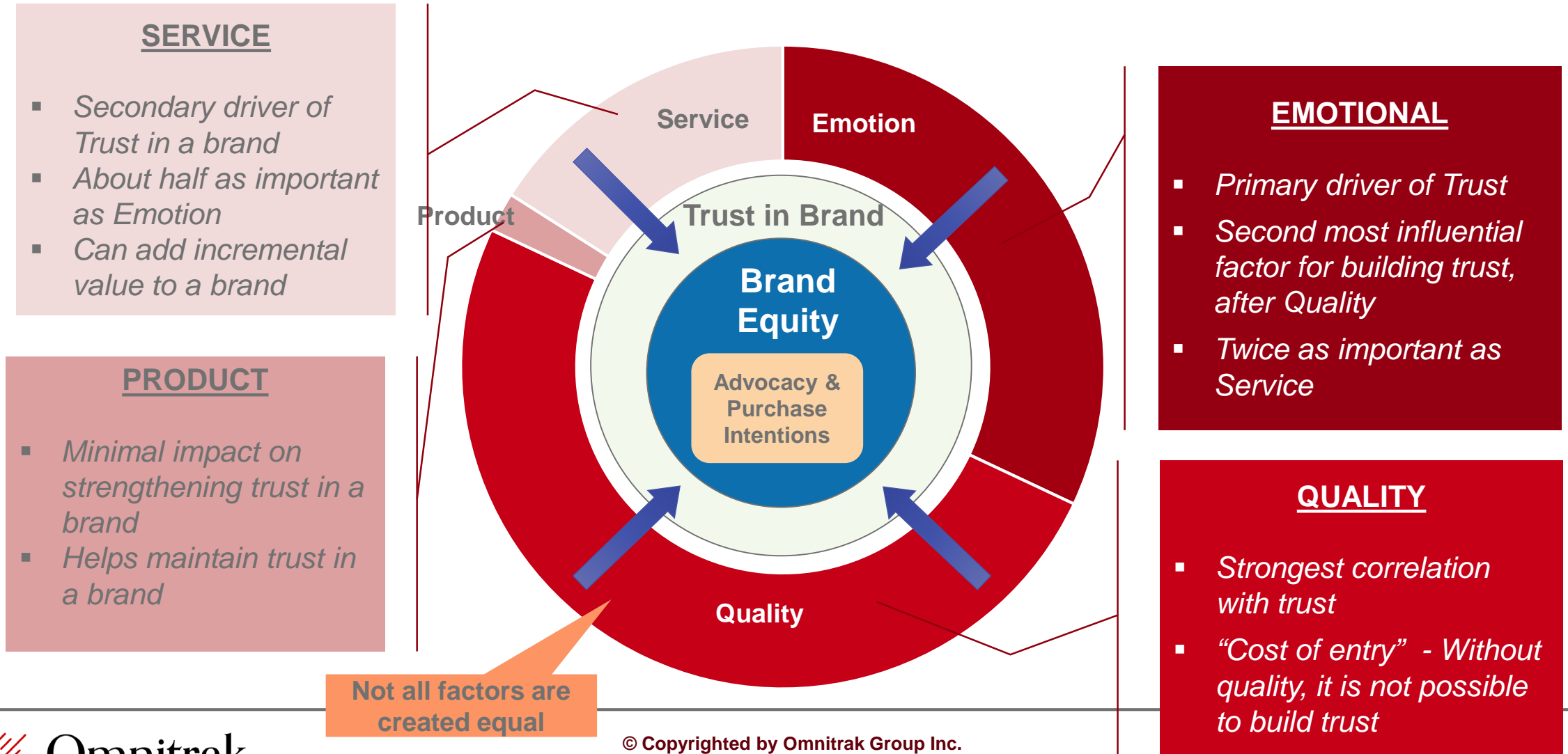
EMOTIONAL ATTRIBUTES

- *Makes you feel proud*
- *Trust it will fulfill my expectations*
- *Is like a friend*
- *Shares my values*
- *Would fulfill my dreams*

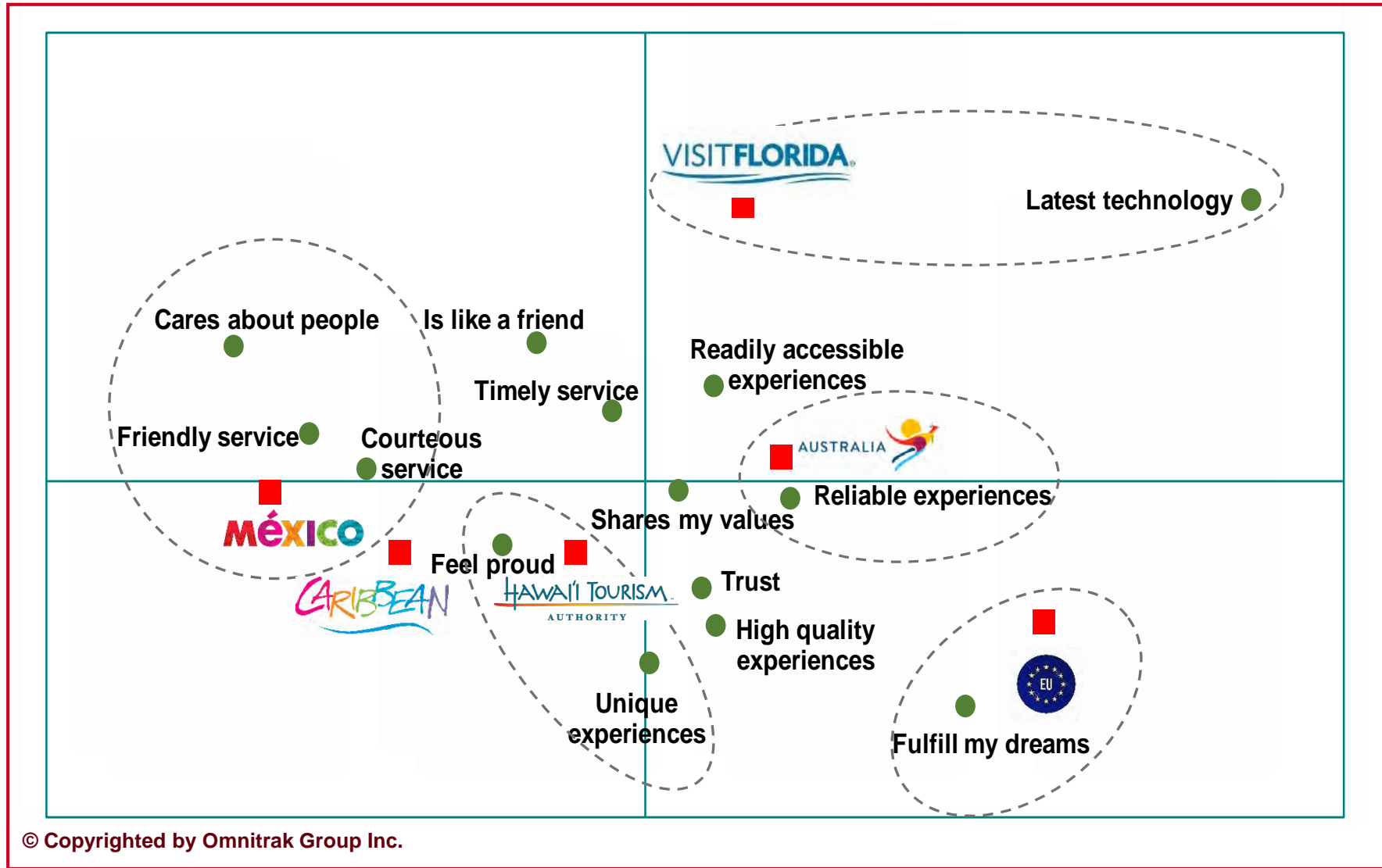
QUALITY ATTRIBUTES

- *Has high quality experiences*
- *Has reliable experiences*

The BrandHeart™ Model: Relative Influence of Factors

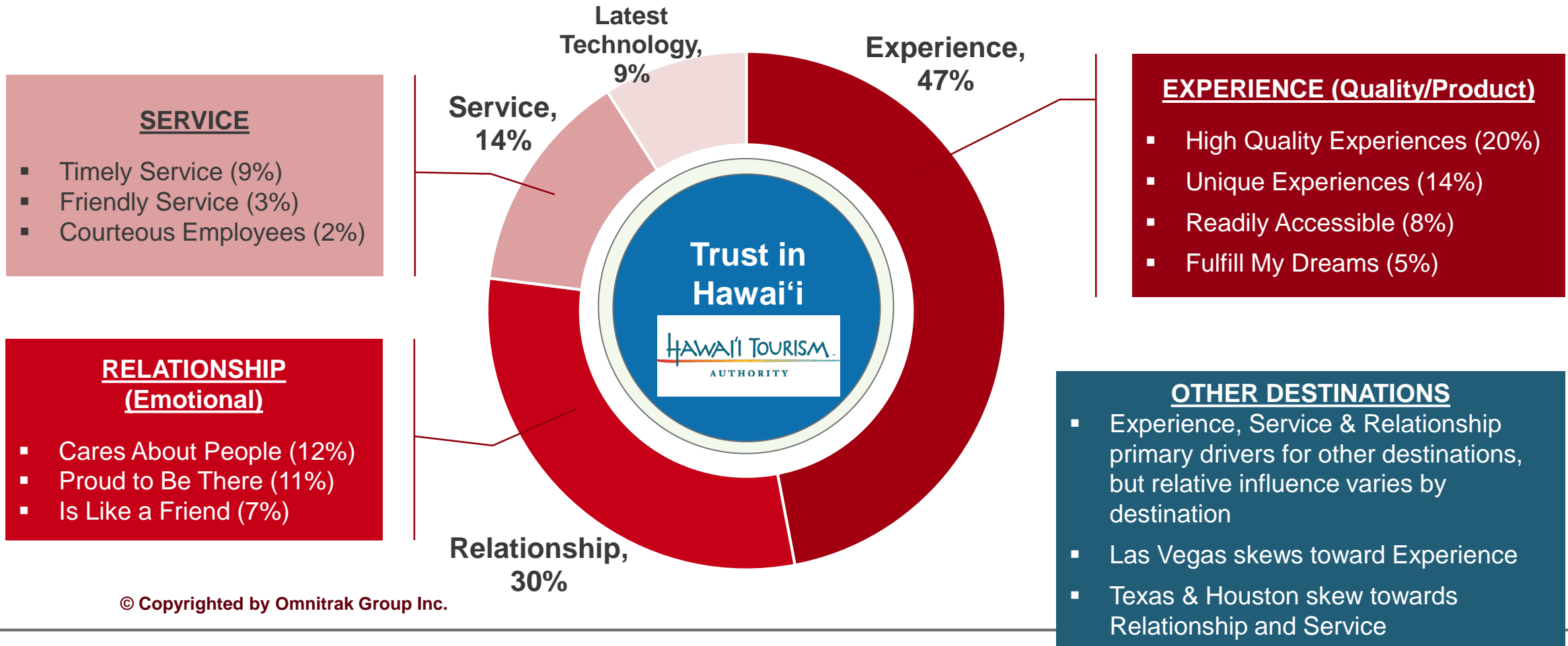


Brand Map™: US Market



U.S. Market Drivers of Trust in Hawai'i

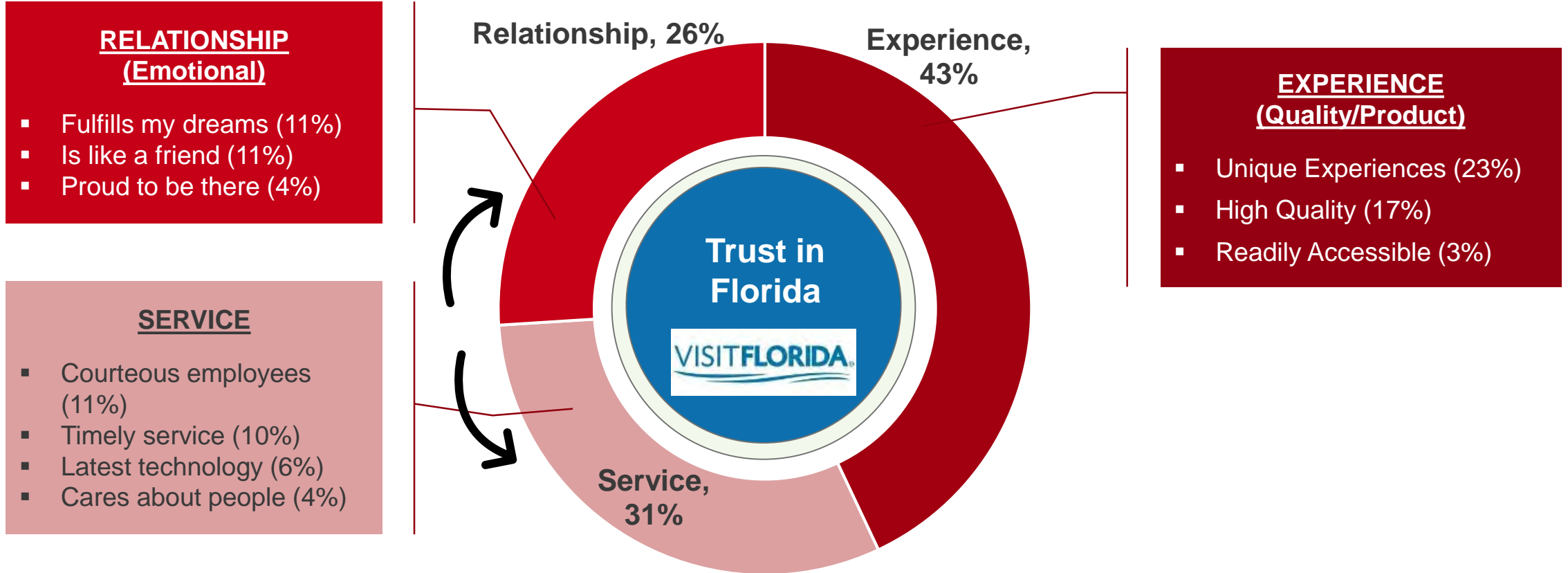
(to fulfill their expectations)
(Independent of Competing Brands)



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U.S. Market Drivers of Trust in Florida

(Independent of Competing Brands)



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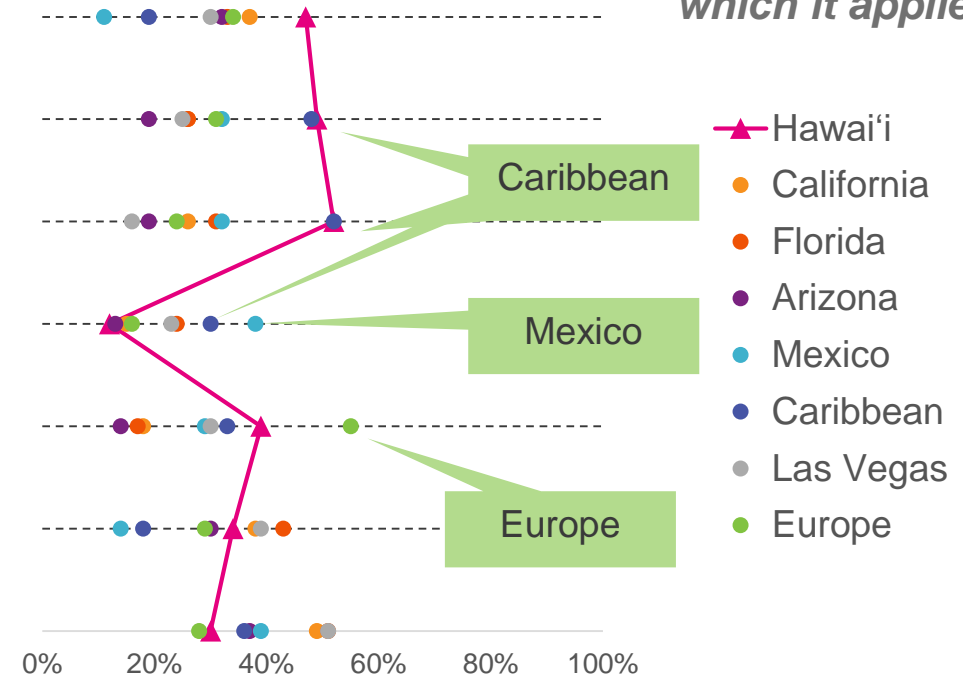
2

Canada Market

Marketplace Attributes – Hawai‘i vs Competitor Destinations

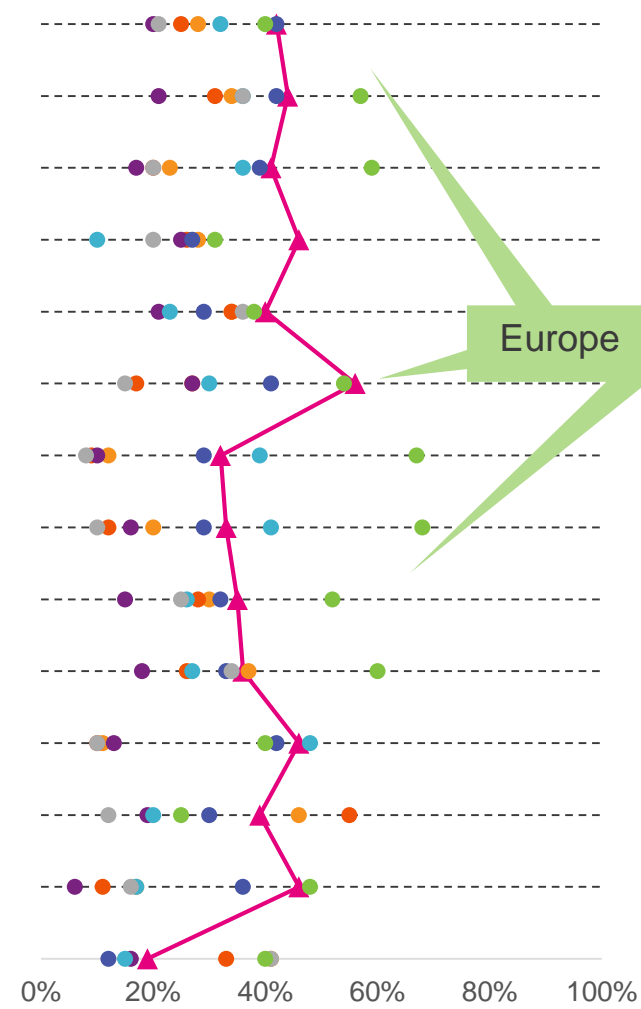
Q) In your opinion, for each attribute listed below, please select the destination(s) to which it applies.

Destination Attribute	Importance Ranking
Safe & secure	84%
Great place to get away from it all	78%
Relaxing, place to unwind	76%
Good value for the money	74%
Different than other places	72%
Easy to get around	70%
Easy to get there	67%



Destination Attributes – Hawai'i vs Competitor Destinations

Destination Attribute	Importance Ranking
Friendly locals	79%
Variety of unique experiences & activities	75%
Authentic experiences	75%
Clean environment	74%
Consistent/dependable experiences	72%
Unique scenery	72%
Intriguing history & culture	70%
Historic/cultural things to do & see	68%
Opportunity to discover new activities & experiences	67%
Quality culinary and dining options	63%
Experiences with native people & culture	59%
Good for family & children	53%
Romantic	44%
It has great shopping	41%



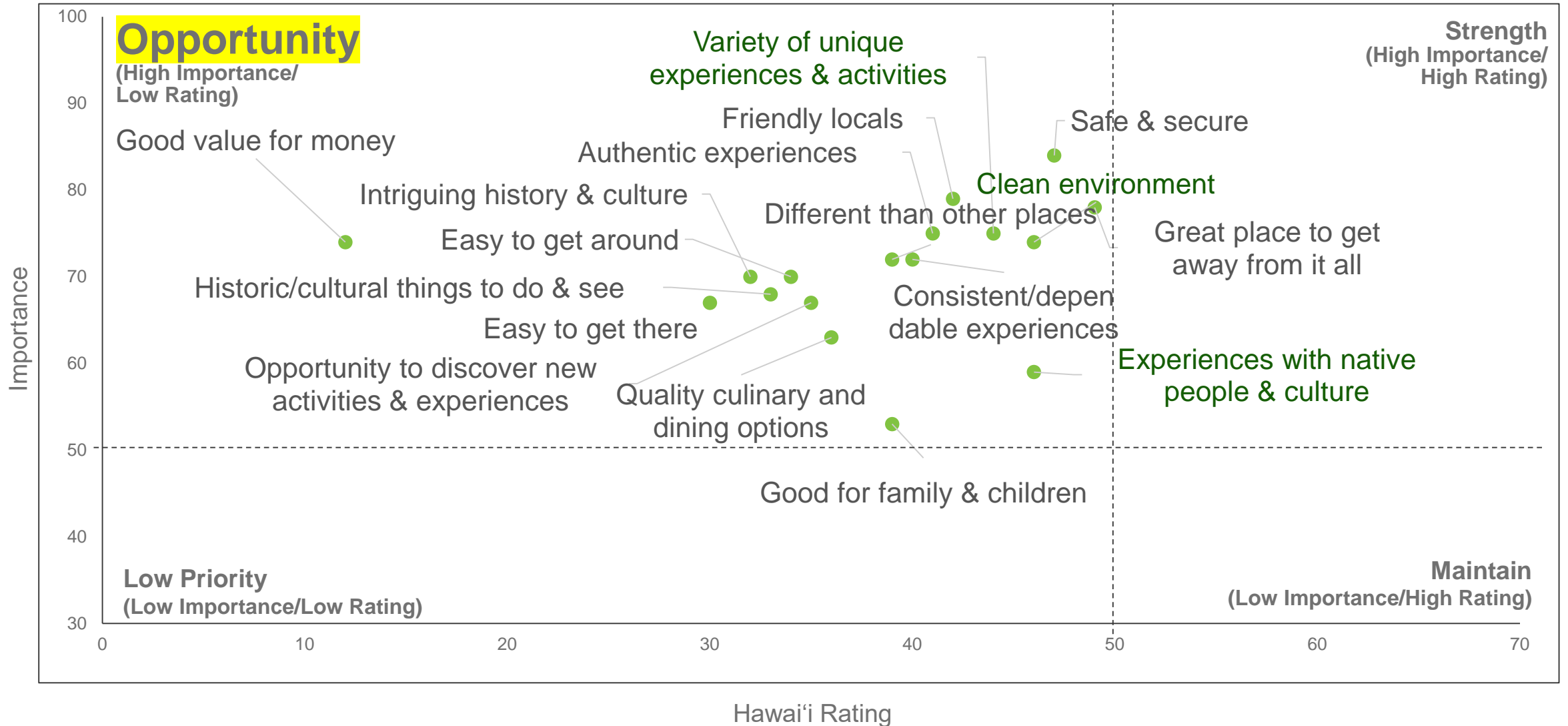
Q) In your opinion, for each attribute listed below, please select the destination(s) to which it applies.

- ▲ Hawai'i
- California
- Florida
- Arizona
- Mexico
- Caribbean
- Las Vegas
- Europe

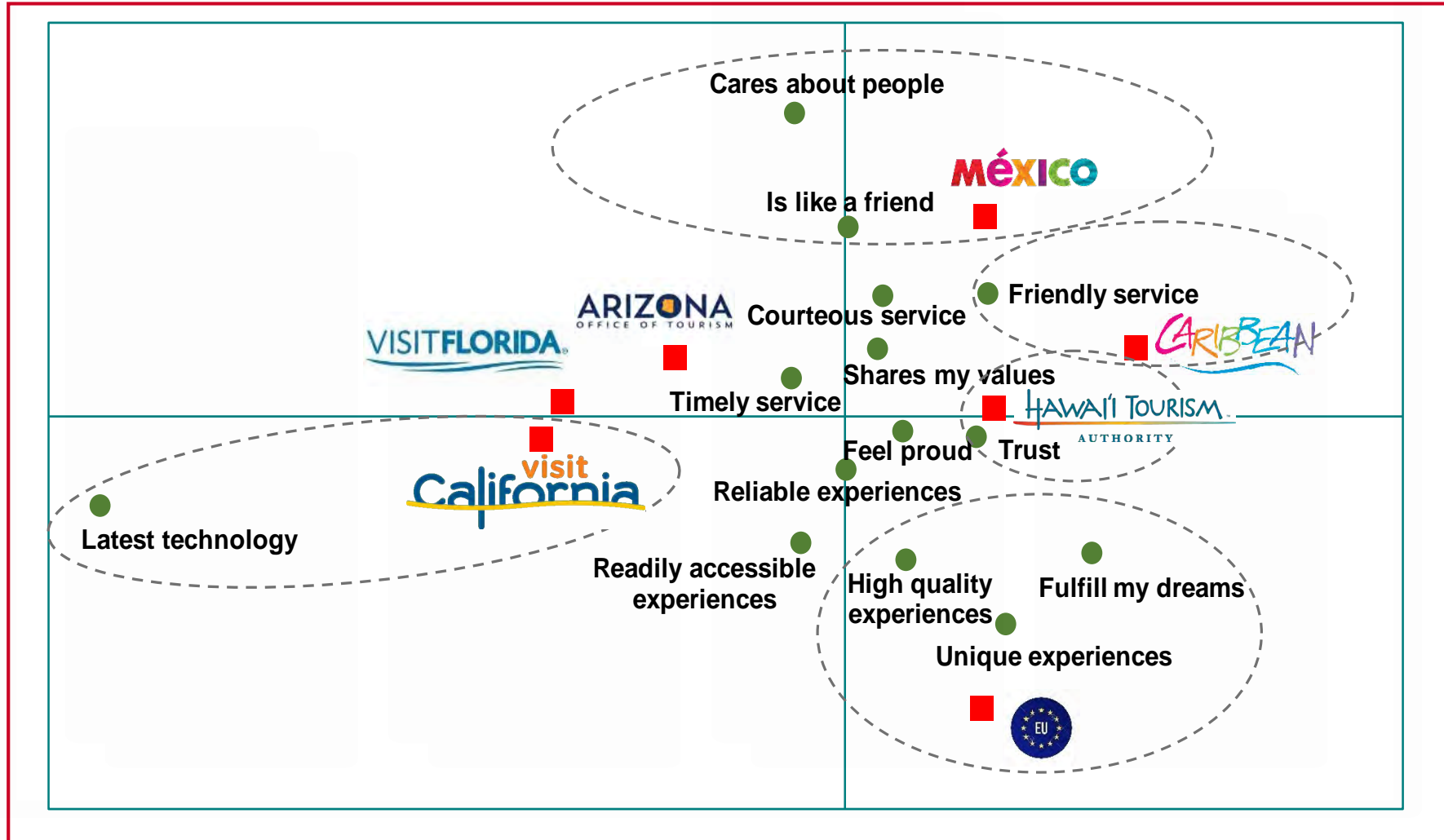
Marketplace & Destination Attributes – Importance vs Hawai‘i Rating



Marketplace & Destination Attributes – Importance vs Hawai‘i Rating



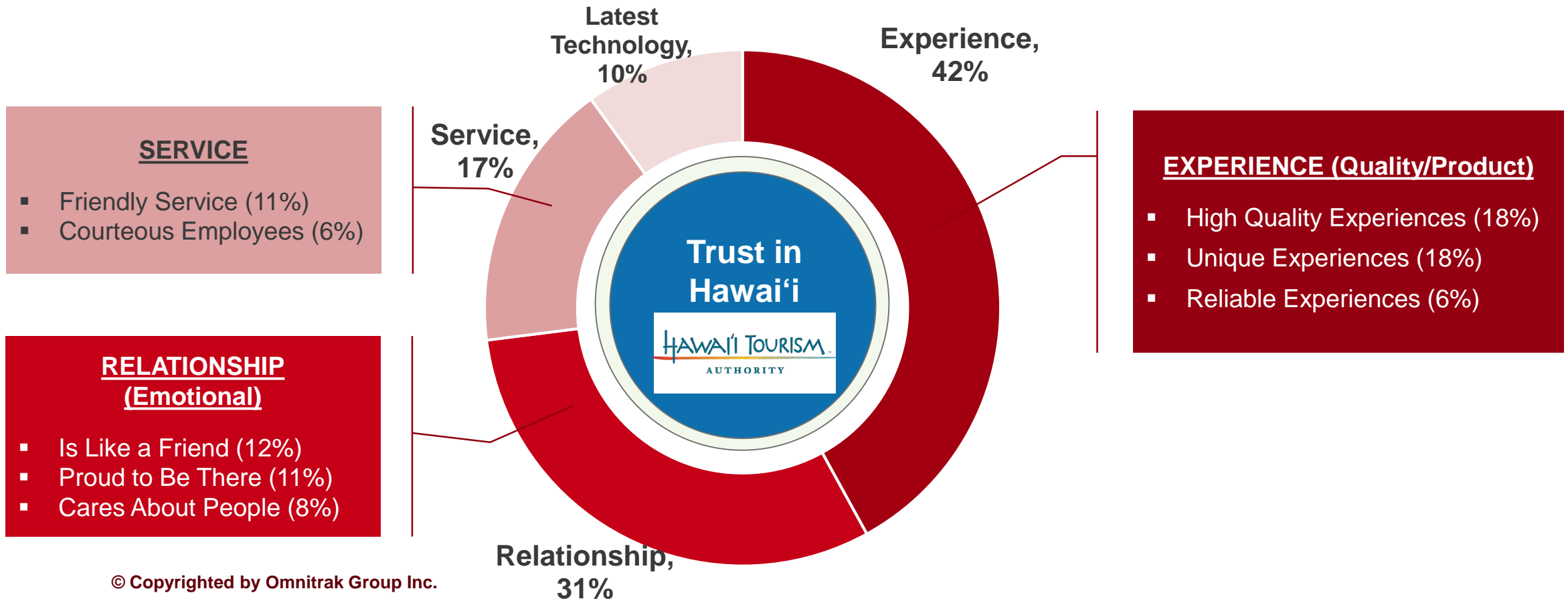
Brand Map™: Canada Market



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Canada Market Drivers of Trust in Hawai'i

(to fulfill their expectations)
(Independent of Competing Brands)



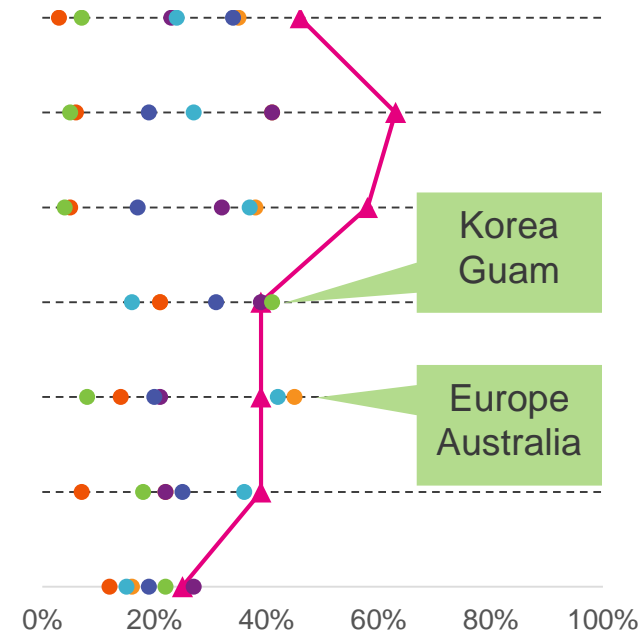
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Japan Market

Marketplace Attributes – Hawai‘i vs Competitor Destinations

Destination Attribute	Importance Ranking
Safe & secure	82%
Relaxing, place to unwind	79%
Great place to get away from it all	75%
Easy to get there	75%
Different than other places	73%
Easy to get around	71%
Good value for money	63%

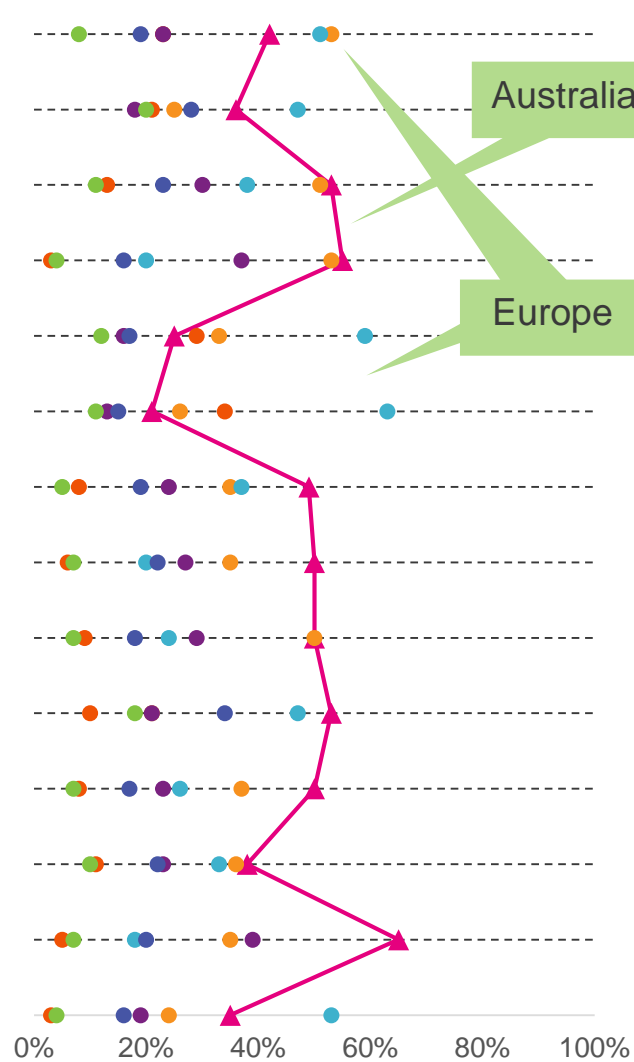


Q) In your opinion, for each attribute listed below, please select the destination(s) to which it applies.

- ▲ Hawai‘i
- Australia
- China
- Guam
- Europe
- Singapore
- Korea

Destination Attributes – Hawai‘i vs Competitor Destinations

Destination Attribute	Importance Ranking
Unique scenery	80%
Quality culinary and dining options	78%
Authentic experiences	73%
Clean environment	73%
Historic/cultural things to do & see	73%
Intriguing history & culture	73%
Consistent/dependable experiences	71%
Friendly locals	67%
Variety of unique experiences & activities	67%
It has great shopping	64%
Opp. to discover new activities & experiences	63%
Experiences with native people & culture	61%
Good for family & children	59%
Romantic	51%



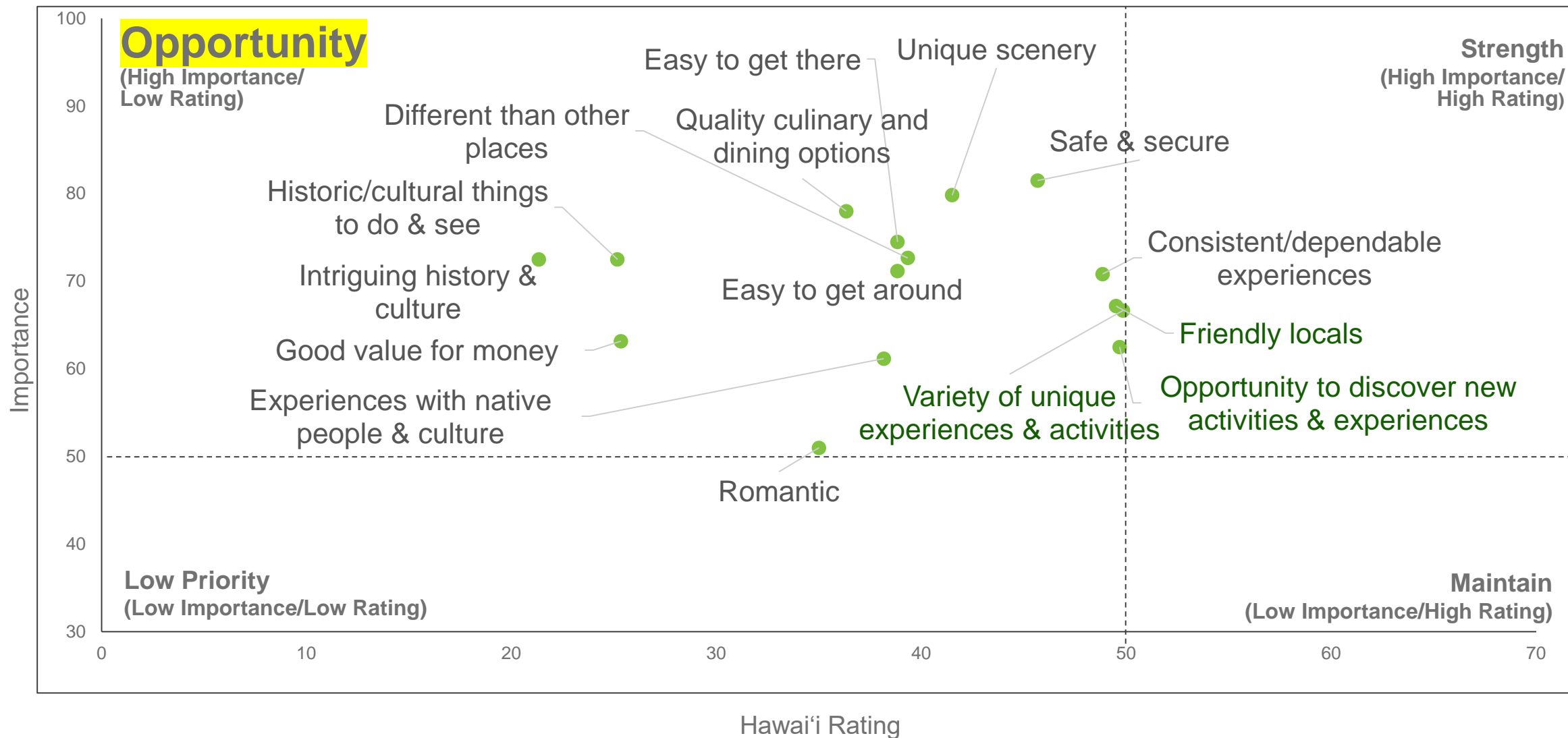
Q) In your opinion, for each attribute listed below, please select the destination(s) to which it applies.

- ▲ Hawai'i
- Australia
- China
- Guam
- Europe
- Singapore
- Korea

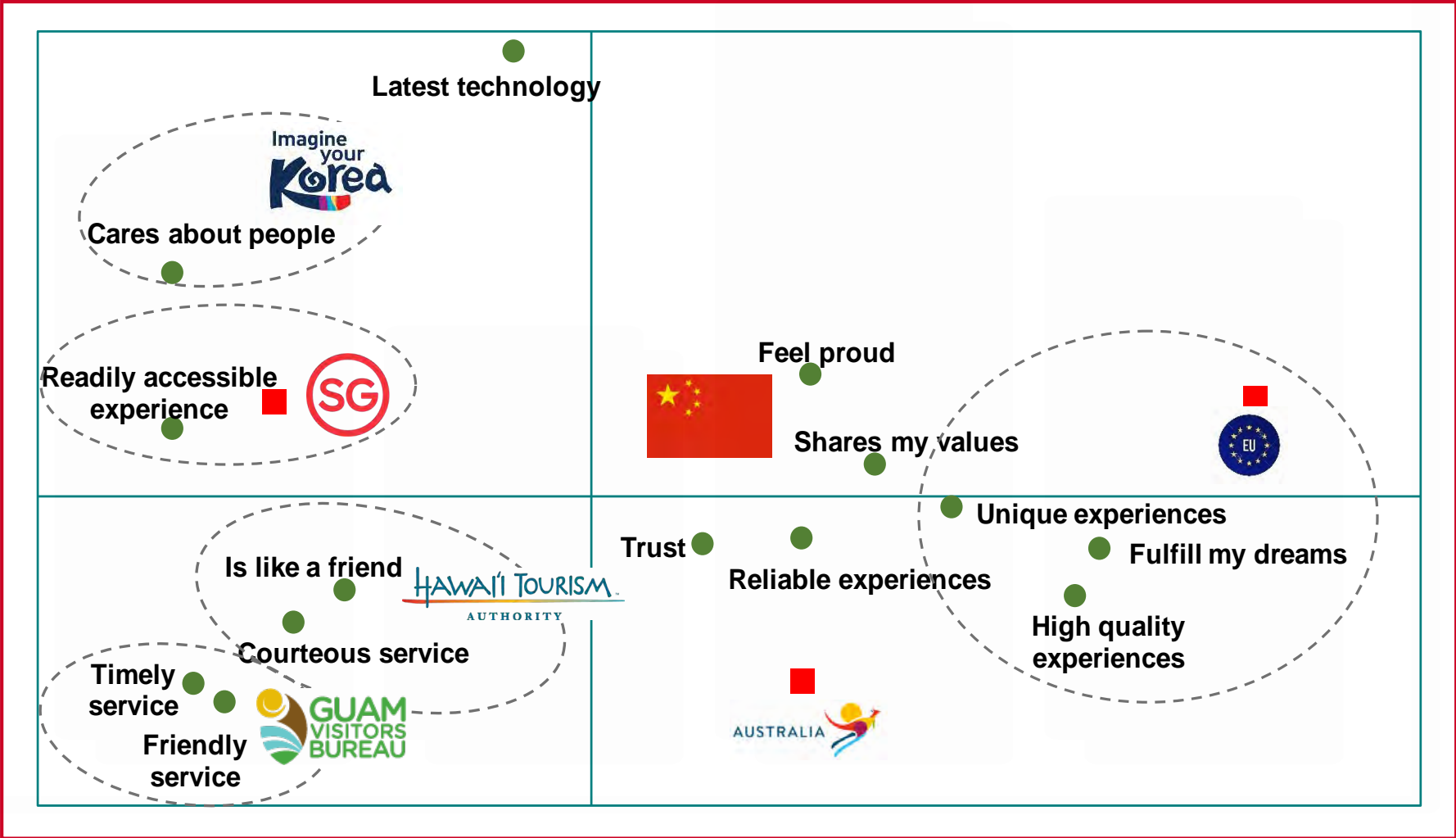
Marketplace & Destination Attributes – Importance vs Hawai‘i Rating



Marketplace & Destination Attributes – Importance vs Hawai‘i Rating



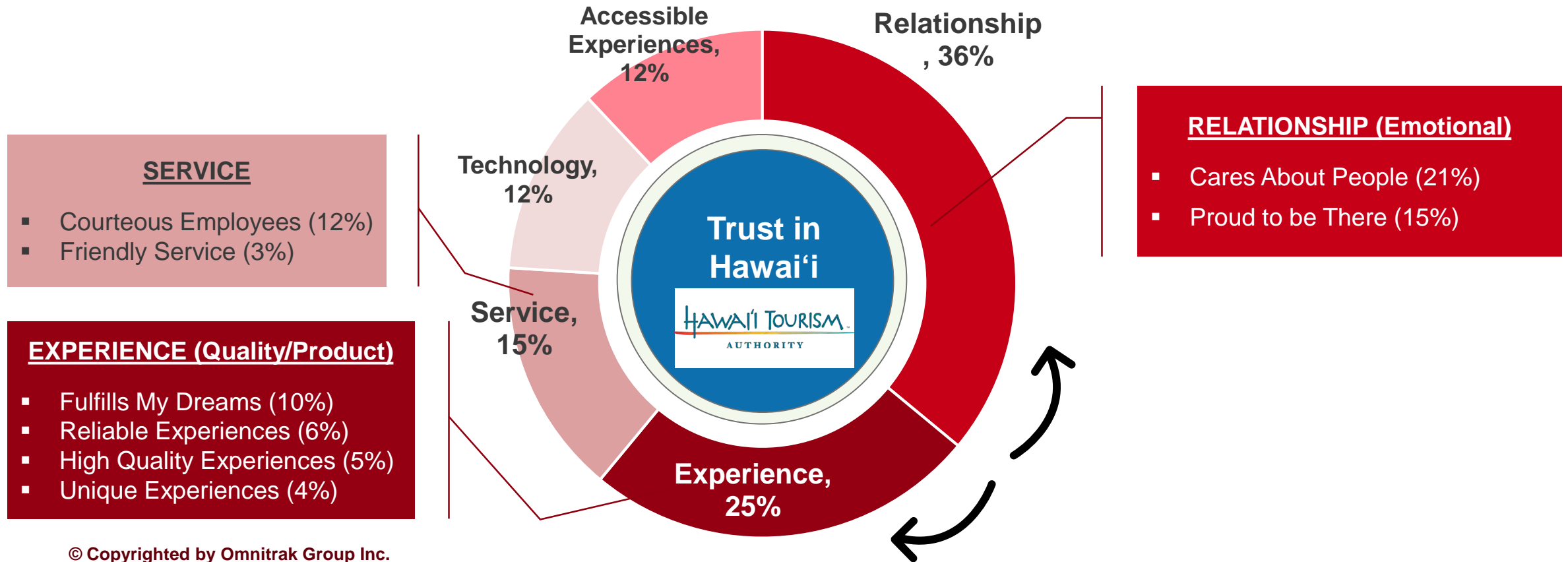
Brand Map™: Japan Market



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Japan Market Drivers of Trust in Hawai'i

(to fulfill their expectations)
(Independent of Competing Brands)



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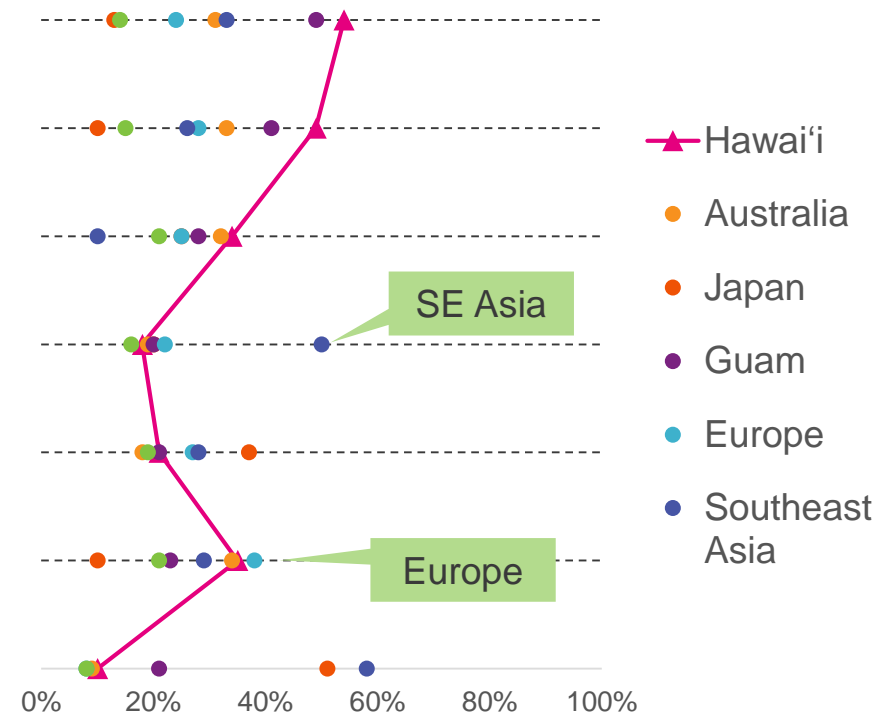
Korea Market

Marketplace Attributes – Hawai‘i vs Competitor Destinations

Destination Attribute	Importance Ranking
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Relaxing, place to unwind	85%
Great place to get away from it all	82%
Safe & secure	82%
Good value for money	77%
Easy to get around	76%
Different than other places	74%
Easy to get there	69%

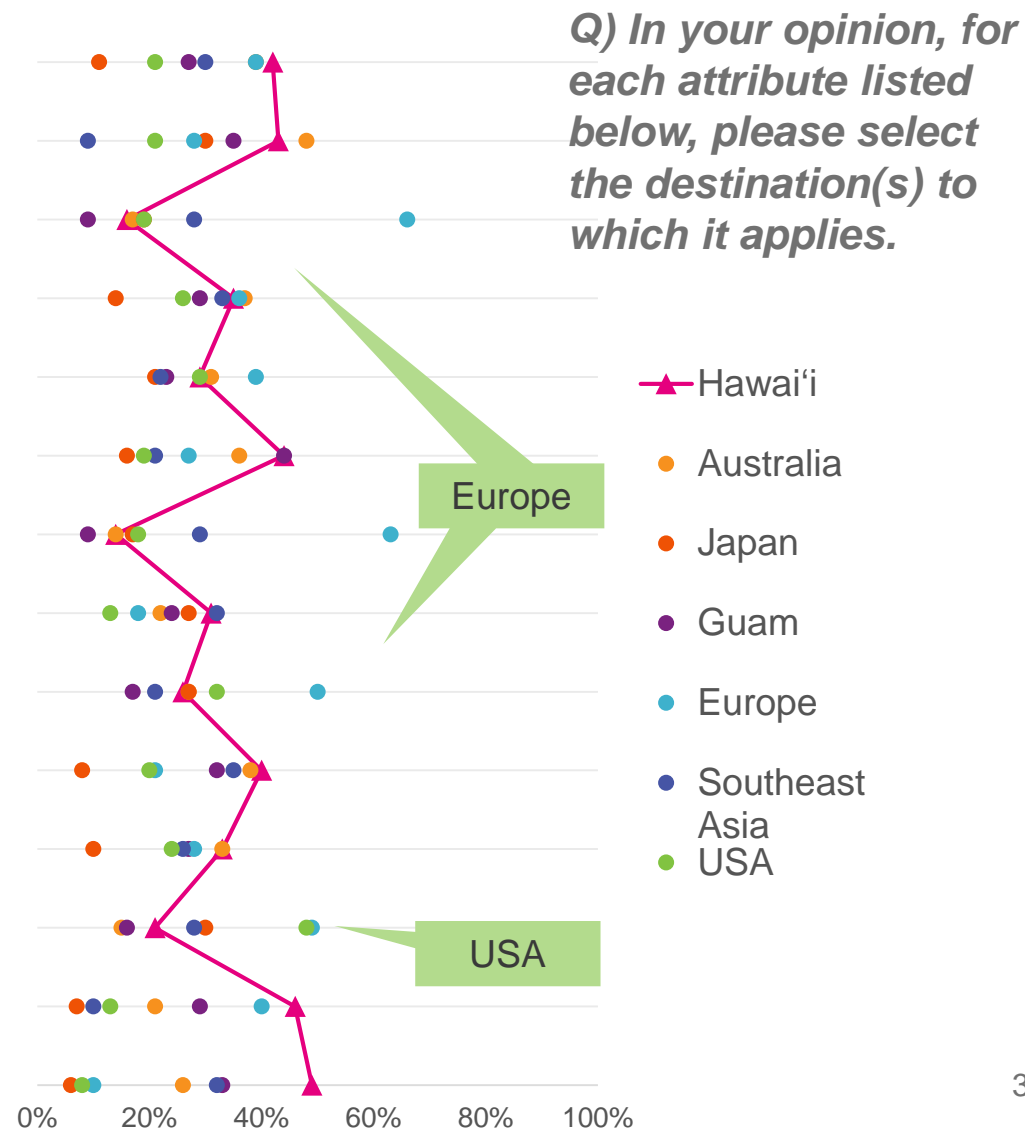
Q) In your opinion, for each attribute listed below, please select the destination(s) to which it applies.



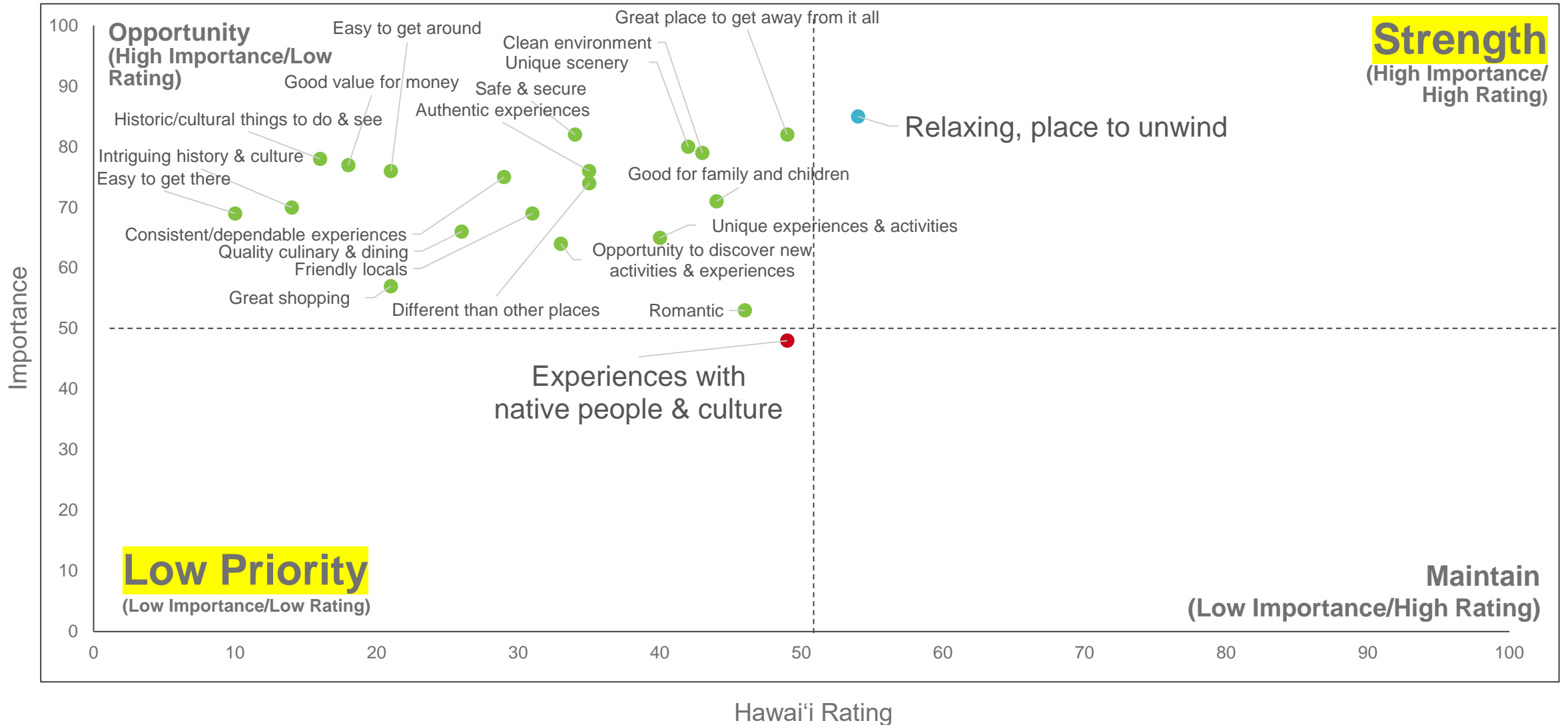
Destination Attributes – Hawai'i vs Competitor Destinations

Destination Attribute	Importance Ranking
-----------------------	--------------------

Unique scenery	80%
Clean environment	79%
Historic/cultural things to do & see	78%
Authentic experiences	76%
Consistent/dependable experiences	75%
Good for family and children	71%
Intriguing history & culture	70%
Friendly locals	69%
Quality culinary & dining	66%
Unique experiences & activities	65%
Opportunity to discover new activities & experiences	64%
Great shopping	57%
Romantic	53%
Experiences with native people & culture	48%



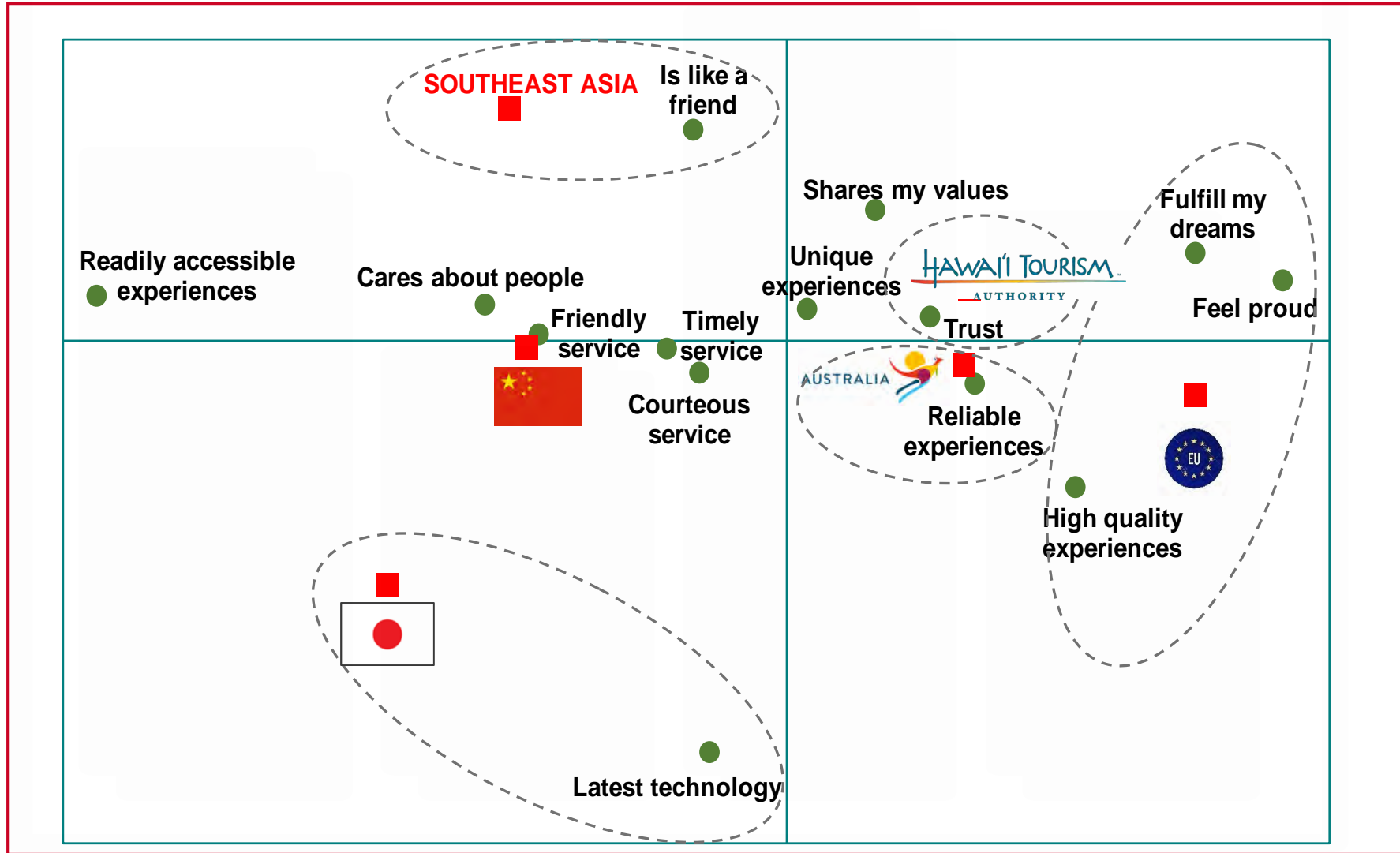
Marketplace & Destination Attributes – Importance vs Hawai‘i Rating



Marketplace & Destination Attributes – Importance vs Hawai‘i Rating



Brand Map™: Korea Market



Korea Market Drivers of Trust in Hawai'i

(to fulfill their expectations)
(Independent of Competing Brands)

ACCESSIBILITY

- Latest Technology (5%)
- Readily Accessible Experiences (4%)

SERVICE

- Timely Service (14%)
- Friendly Service (9%)
- Courteous Employees (3%)

RELATIONSHIP (Emotional)

- Cares About People (20%)
- Is Like a Friend (6%)
- Proud to be There (5%)

Accessible Experiences, 9%

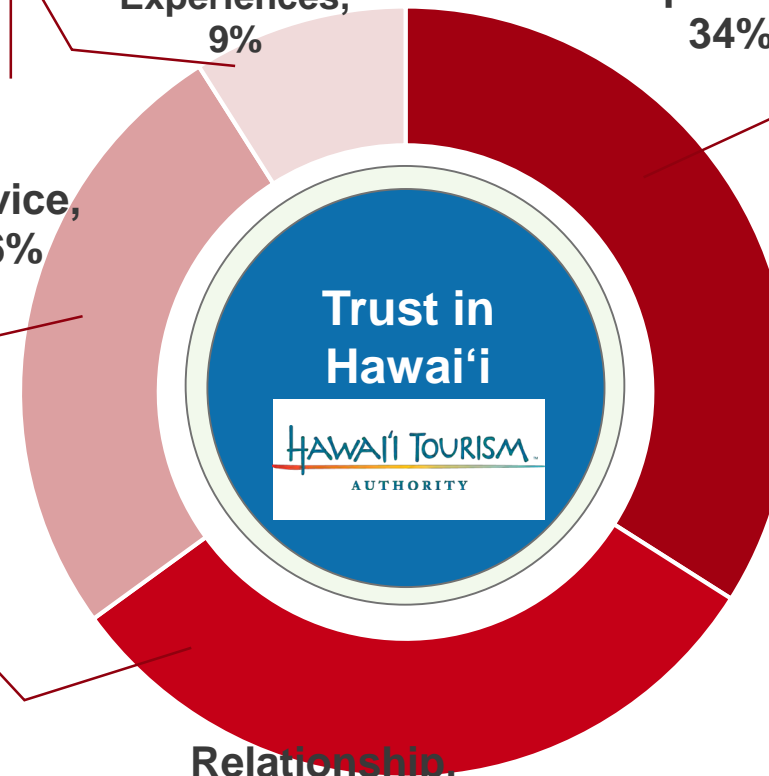
Experience, 34%

Service, 26%

Relationship, 31%

EXPERIENCE (Quality/Product)

- High Quality Experiences (13%)
- Reliable Experiences (13%)
- Fulfills My Dreams (8%)



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Market Summaries Across Key Points

	US	Canada	Japan	Korea
Opportunities	History, Culture, Cuisine, Unique Scenery	Clean environment, Native culture, Unique experiences	Friendly locals, New & Unique experiences	Clean environment, Good for families, Romance
Brand Map	Unique experiences; Feel proud to be there	Trust it will fulfill my expectations	Is like a friend; Courteous service	Trust it will fulfill my expectations
Experience	47%	42%	25%	34%
Relationship	30%	31%	36%	31%
Service	14%	17%	15%	26%
Technology	9%	10%	12%	-
Accessibility	-	-	12%	9%

Drivers of Trust

Mahalo from the Omnitrak Group!

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2019 Fall Tourism Update
*Marketing the Hawaiian
Islands in a Sea of
Sameness*

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