



Hawai'i Tourism Authority 2019 Fall Tourism Summit

November 18, 2019



THE FUTURES STUDY

- Overview of trends and strategies for destination organizations worldwide
- Updated in 2014, 2017, 2019

SCENARIO MODEL

- Assesses destination strength and community alignment
- 200+ destinations in 11 countries

The 2019 Futures Study

4 Advisory Panels



**Industry
Disruptors**

**Industry
Clients**

**Community
Leaders**

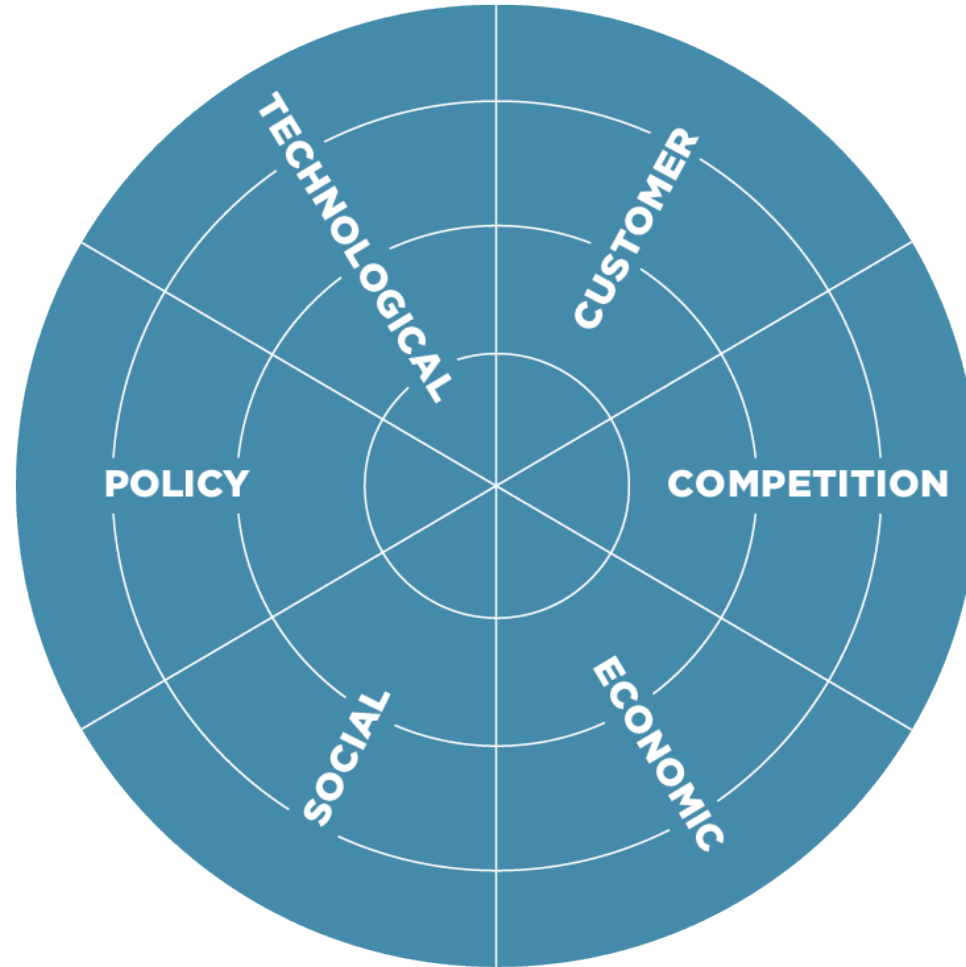
**Destination
Leaders**

Strategic Radar Map

52

52

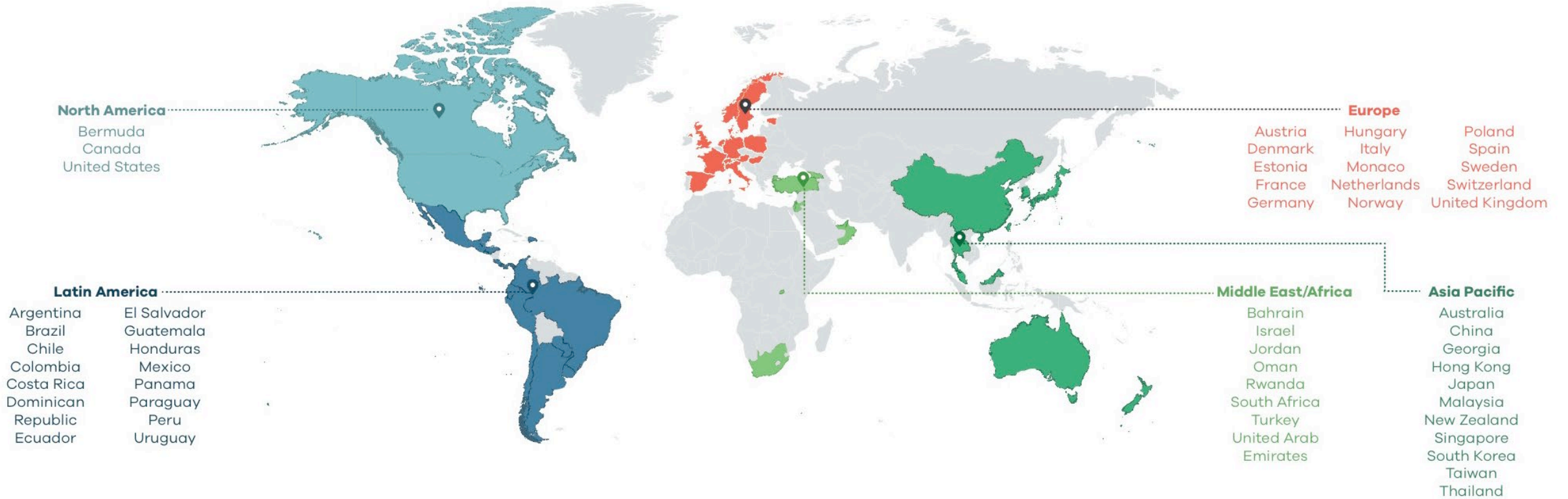
Trends



64

Strategies

Global Scope



521

Participants

55

Countries

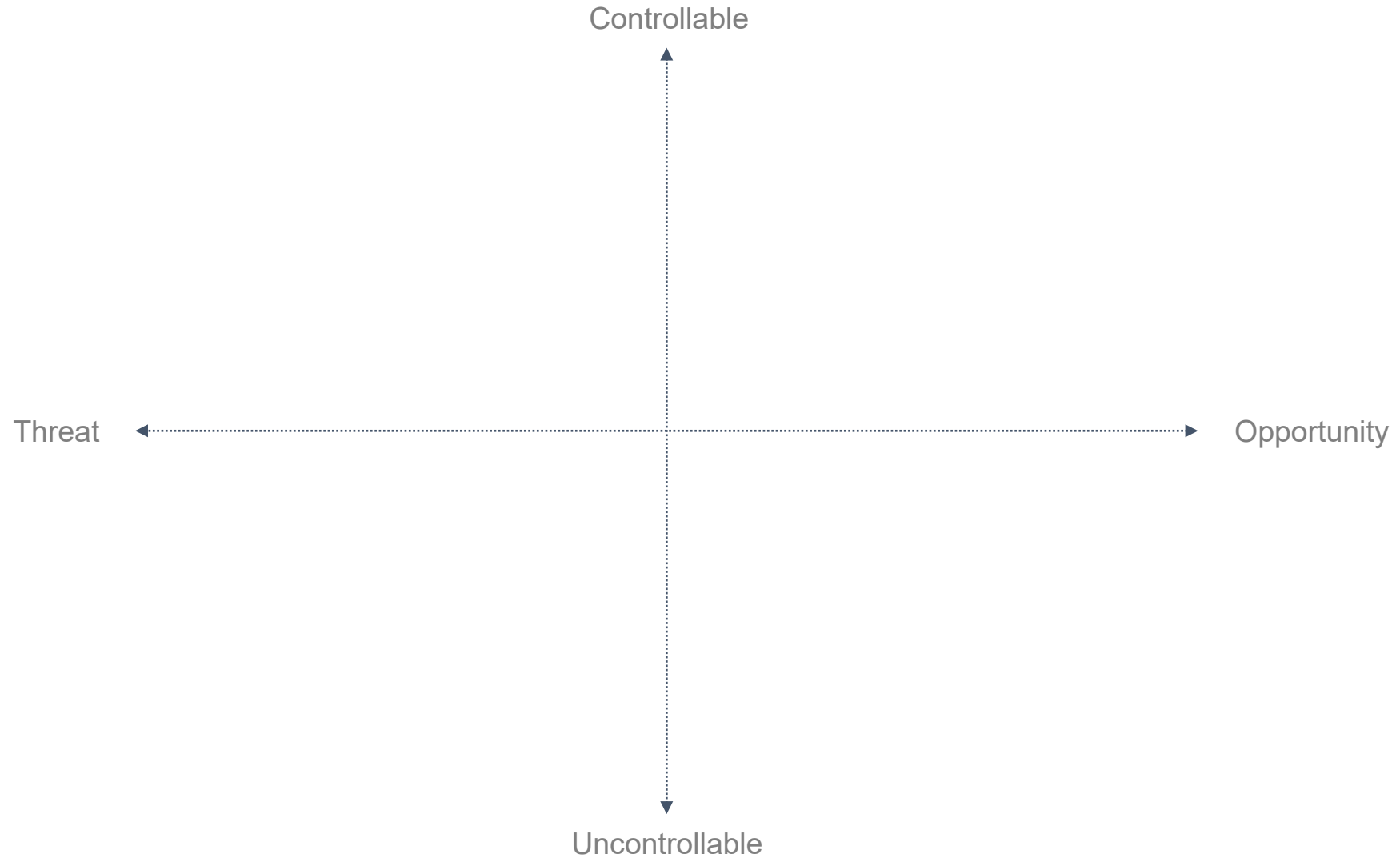


Top 20 Trends in 2019

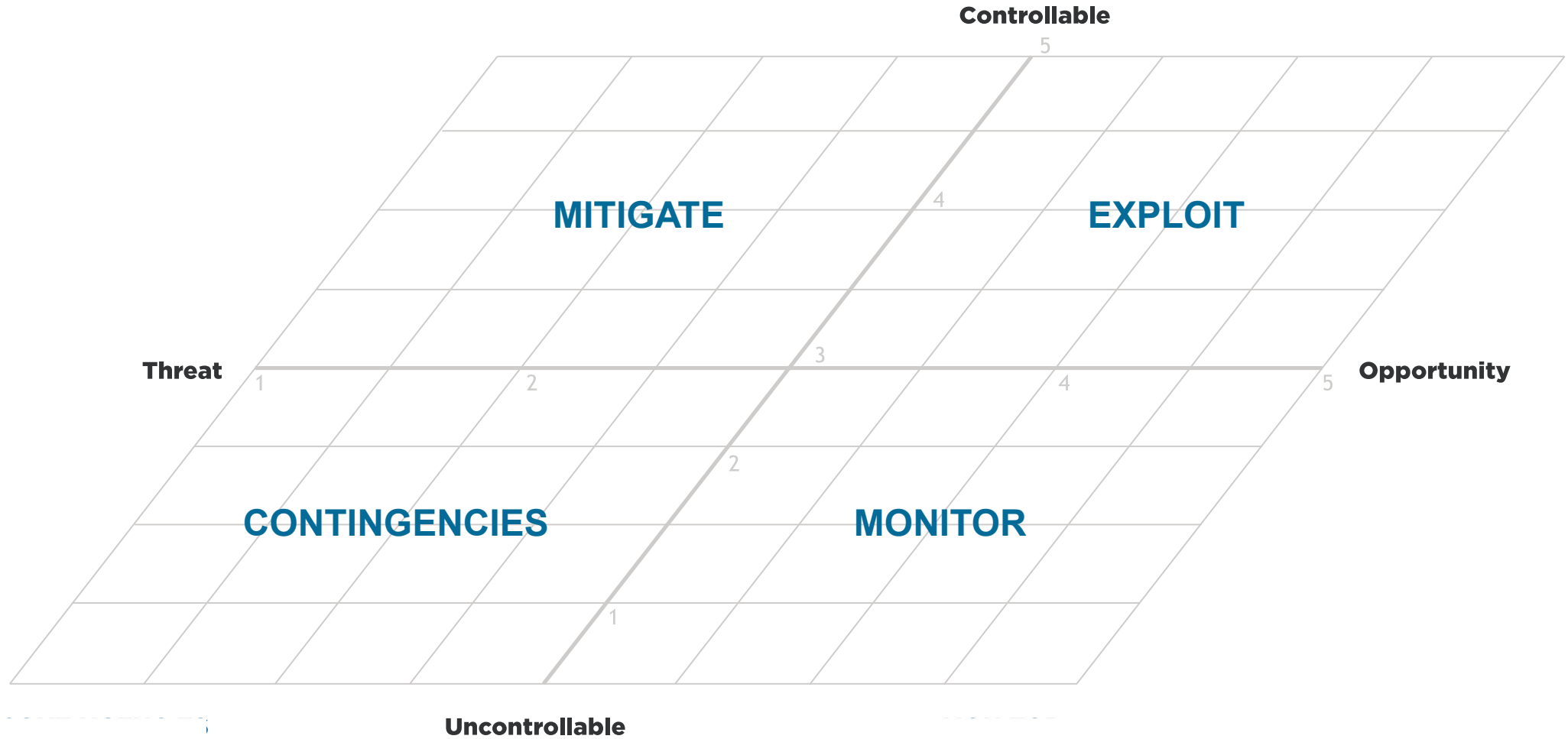
Top Trend Movers in 2019

- 10▲** **7.** Travelers demanding more information, control, interaction and personalized information.
- 13▲** **11.** Communities more engaged in the development and management of the destination experience.
- 39▲** **12.** Increasing importance of transparency and building partnerships to secure business to a destination.
- NEW** **14.** More communities and municipal governments are aware of importance of tourism to local economy.
- NEW** **16.** People are seeking more personal enrichment in their travels, including wellness and well-being.
- NEW** **17.** Destinations looking at sustainability more broadly, encompassing economic, social and environmental impacts.
- 23▲** **18.** More third-party information providers aggregating content about destinations.
- 10▲** **19.** Peer-to-peer buyer influence driving customer purchases.

Future Map

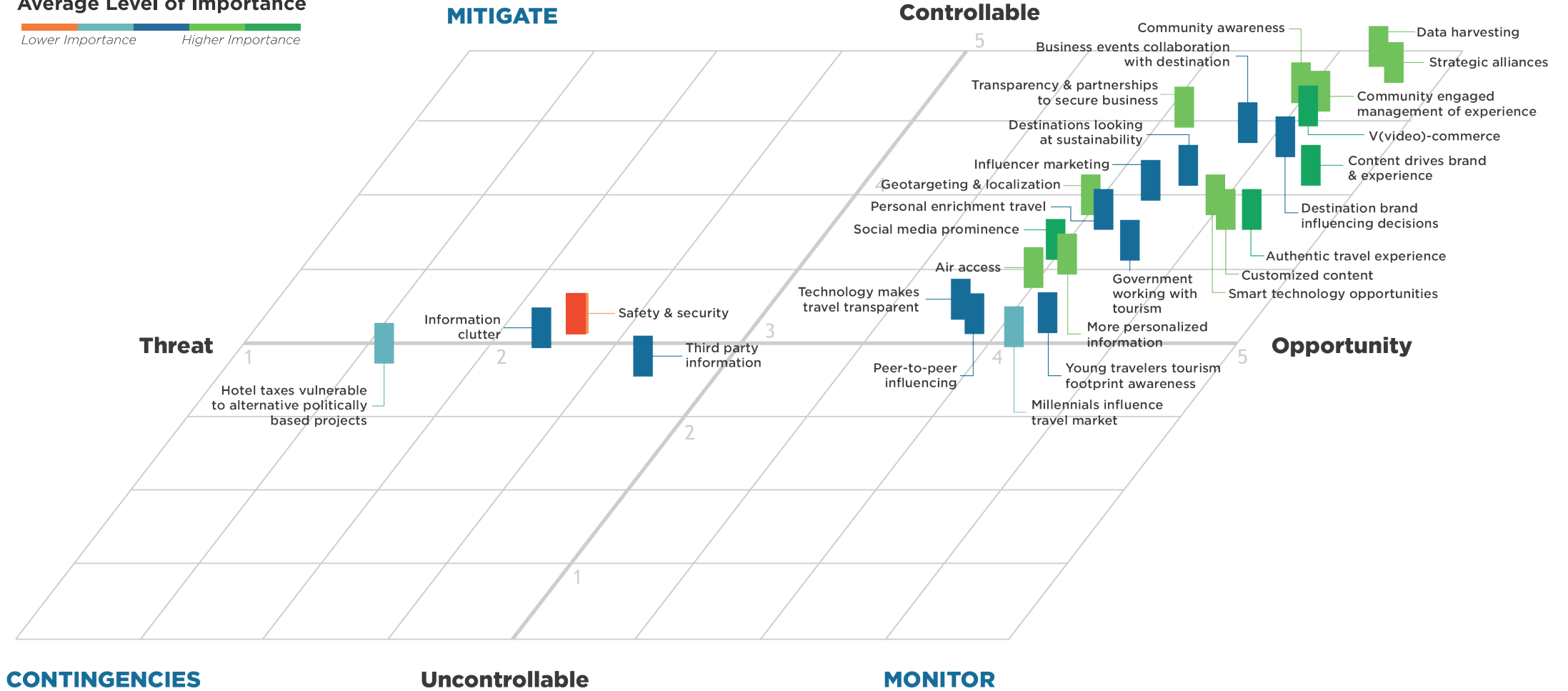


Future Map

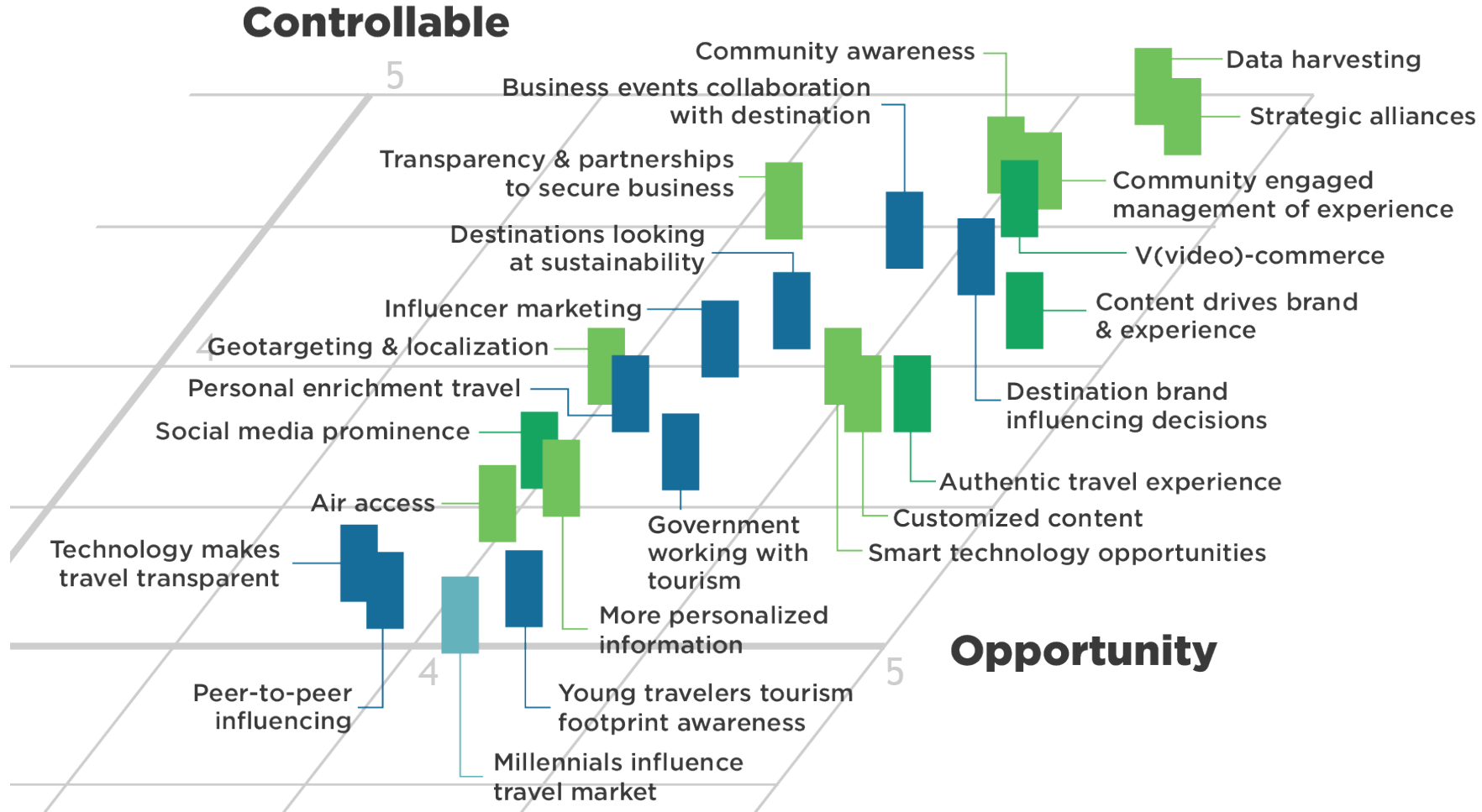


Future Map

Average Level of Importance
 Lower Importance Higher Importance



Future Map



Three Transformational Opportunities:

#1 Destination Stewardship

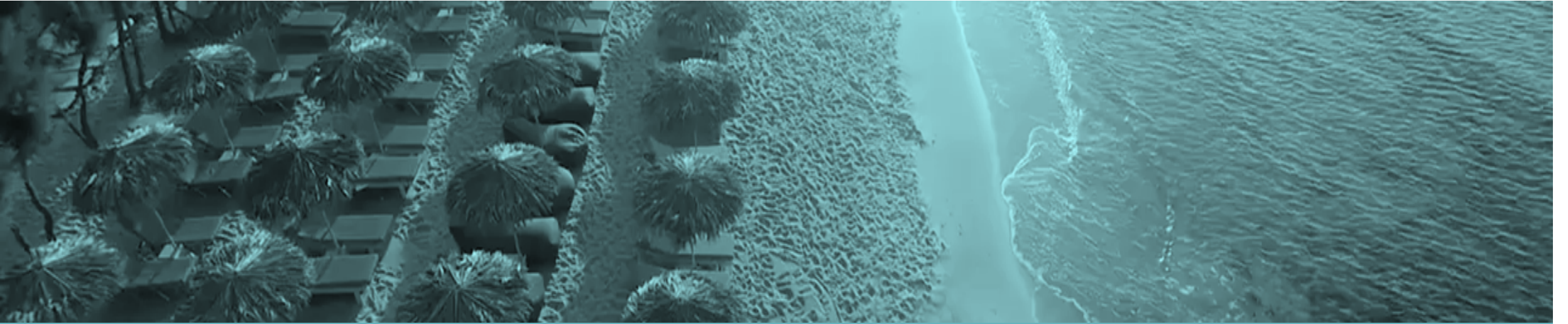
Balancing economic development, sustainable tourism and quality of life

#2 Community Alignment

Building public support around a shared vision for the destination

#3 Digital Conversion

Connecting with visitors on mobile devices to drive real-time sales in-destination



Top 20 Strategies in 2019

Top Strategy Movers in 2019

- 10▲ **5. My destination organization will adopt consistent standards and measures of performance with other organizations.**
- 33▲ **6. My destination organization will act as conduit to build social networks among our local business community.**
- NEW **8. My destination will have a tourism master plan to define long-term destination development direction.**
- NEW **11. My destination will better integrate tourism, economic development and talent attraction.**
- 19▲ **12. My destination organization has a key responsibility to protect our environmental, social and cultural characteristics.**
- 11▲ **17. My destination organization will balance the need for growth with responsible and sustainable development.**
- NEW **18. My destination organization will develop outreach programs in our local community to broaden our networks.**
- NEW **19. My destination organization will leverage our destination's priority industry sectors to generate business.**



1 Destination Stewardship

Thirst for Unique, Authentic, Personalized Experiences



Wynwood Miami

Montreal Illuminations: From Attraction to Experience



The Rise of Integrated Sustainability: Economic, Social + Environmental



2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT

May this new year's journey bring you peace and joy
Que la traversée de cette nouvelle année vous apporte joie et paix
Que la travesía de este nuevo año les traiga paz y felicidad
Пусть Новый год подарит вам путешествие,
наполненное умиротворенностью и радостью
فتتجلب لكم رحلة هذا العام الجديد السلام والسعادة



TRAVEL.
ENJOY.
RESPECT.
#TRAVELENOYRESPECT



2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT



JOIN THE
MOVEMENT.
#TRAVELENOYRESPECT



2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT



New Breckenridge Tourism Vision

A Harmony of Quality of Life for Residents
and Quality of Place for Visitors





Community Alignment

Resident Support is Critical For Long-Term Success





Hawaii Tourism Authority's KPIs:

- **Visitor Satisfaction**
- **Resident Sentiment**
- **Per Person Daily Spend**
- **Total Visitor Spend**

Saint John, New Brunswick: Hula - Discover the Wins



Monterey, CA Sustainable Moments

GRAB LIFE BY THE MOMENTS

MONTEREY
Grab life by the moments:

 **SUSTAINABLE
MOMENTS™**
Visit Responsibly.



More Tourism Funding Diverted to Address Social Issues





Digital Conversion

Every **minute**,
there are:



Digital Engagement

3.8 million

Google searches

1 million

logging into Facebook

4.5 million

YouTube videos watched

87,000

tweets

2.1 million

Snaps created

55,140

Instagram photos posted



Digital Conversion

\$1 million

spent online

\$21,347

spent on Expedia

9,772

Uber trips

1,389

Airbnb bookings

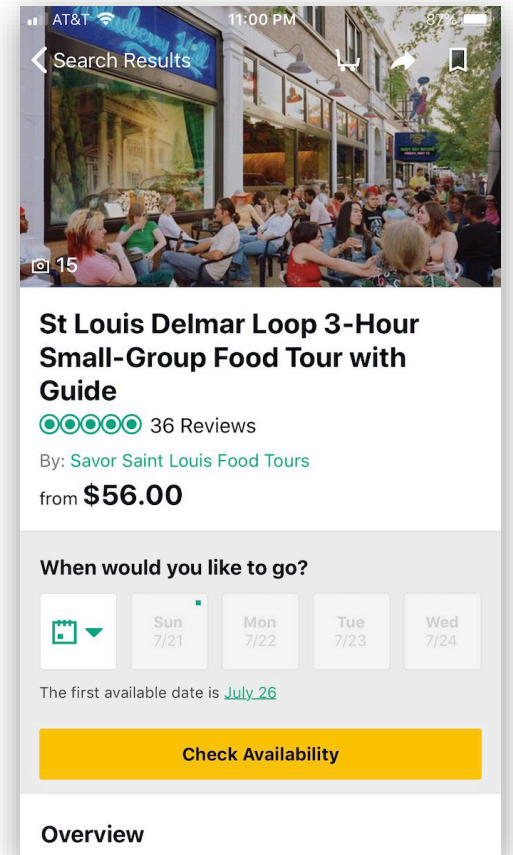
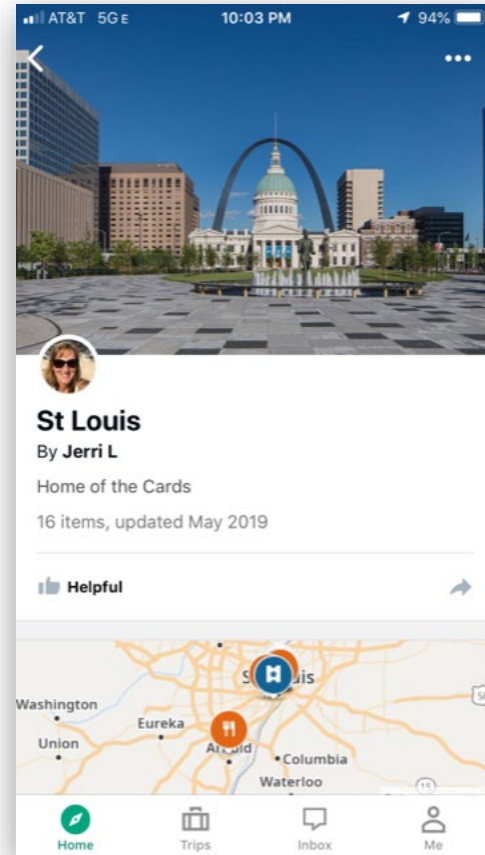
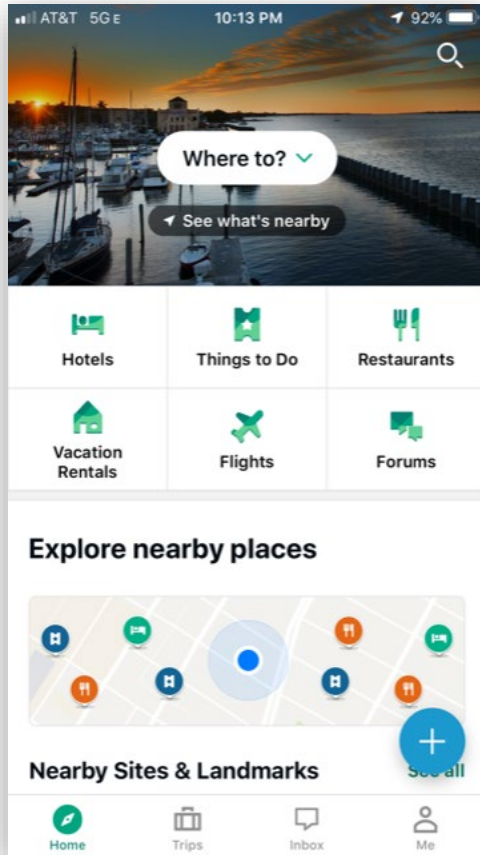
390,030

apps downloaded

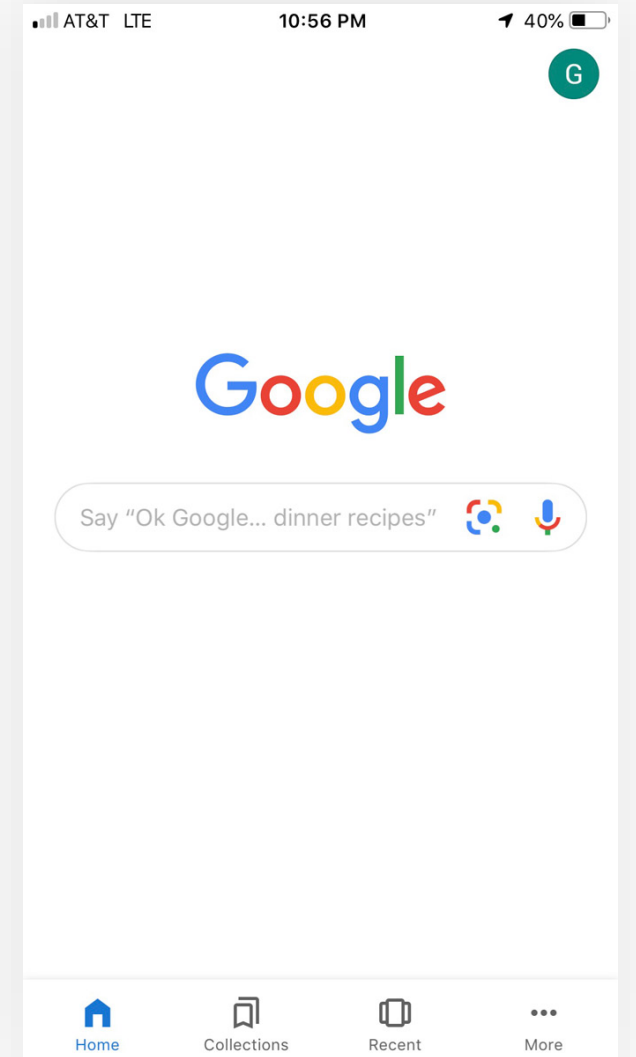
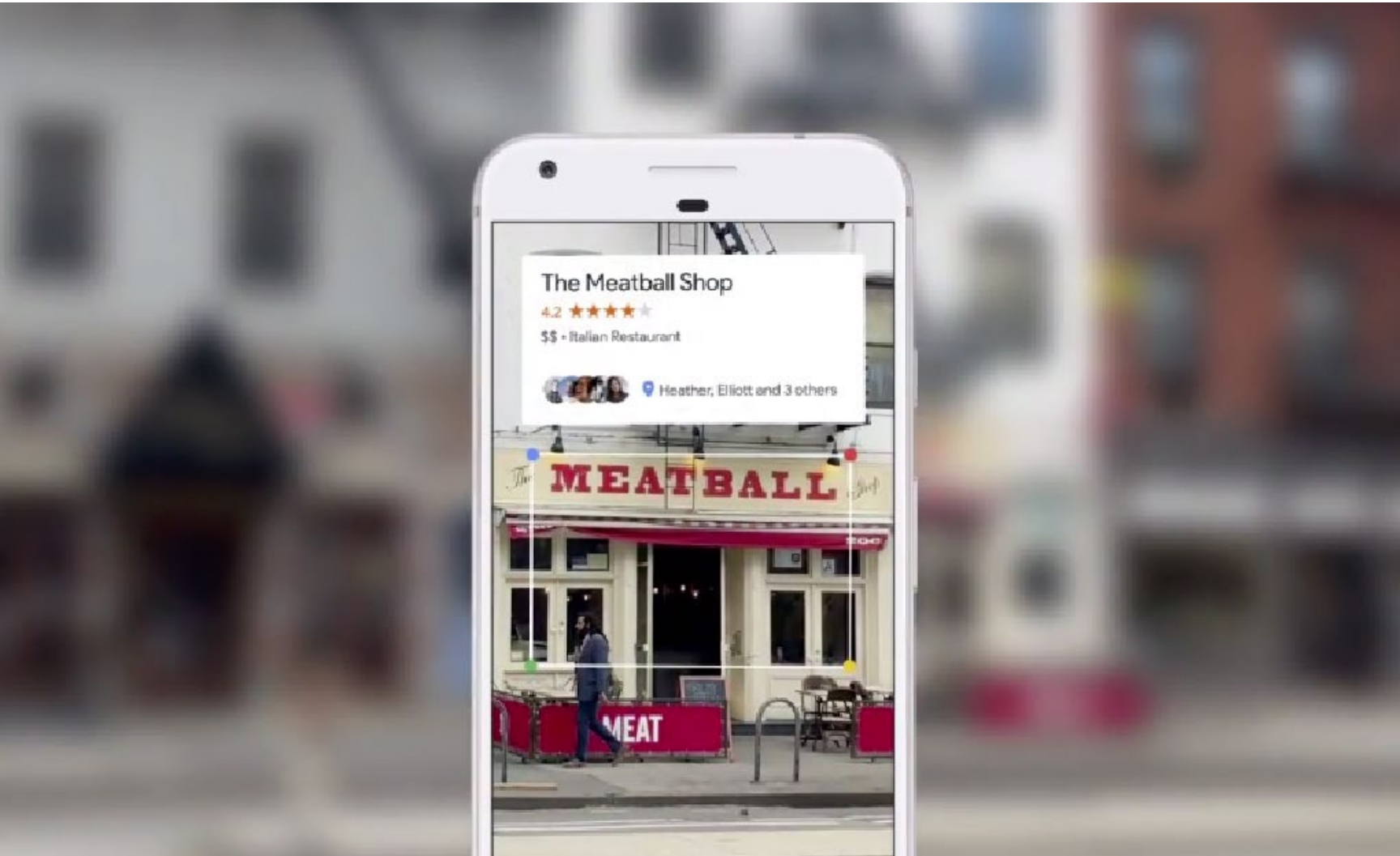
1.4 million

Tinder swipes


TripAdvisor: From Review Site to Tour Booking Engine



Visual Search and Augmented Reality



In-Destination, On-Demand Mobile Booking



Hi, Greg!
Thanks for stopping by the automated San Francisco chatbot. We're here to make sure your first, next or tenth trip to San Francisco makes you want to leave your heart here.


First we need to know: Have you been to San Francisco before?

San Francisco Travel EXPLORE PLAN SEARCH MEETING PLANNERS TRAVEL TRADE MEDIA PARTNERS

ALL ACTIVITIES ARTS & CULTURE DINING EVENTS HOTELS NIGHTLIFE SHOPPING

Book Online or Call 1-800-637-5196

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(8 Photos) Click to view gallery

San Francisco Love Tours

San Francisco, CA
from **\$45**

Buy tickets

TripAdvisor Traveler Rating
 of **1059** reviews

Hitch a ride on a hand painted VW bus and get to know today's San Francisco through the timeless hippie vibes and timeless songs. Travel where big tour buses are forbidden. Visit the homes of San Francisco's counter-culture icons such as The Grateful Dead, Janis Joplin and Jimi Hendrix, while grooving to entertaining and education facts and stories of this great City!

Hours
Daily Pick Up Times: 9 AM, 11 AM, 1 PM, 3 PM, 5 PM





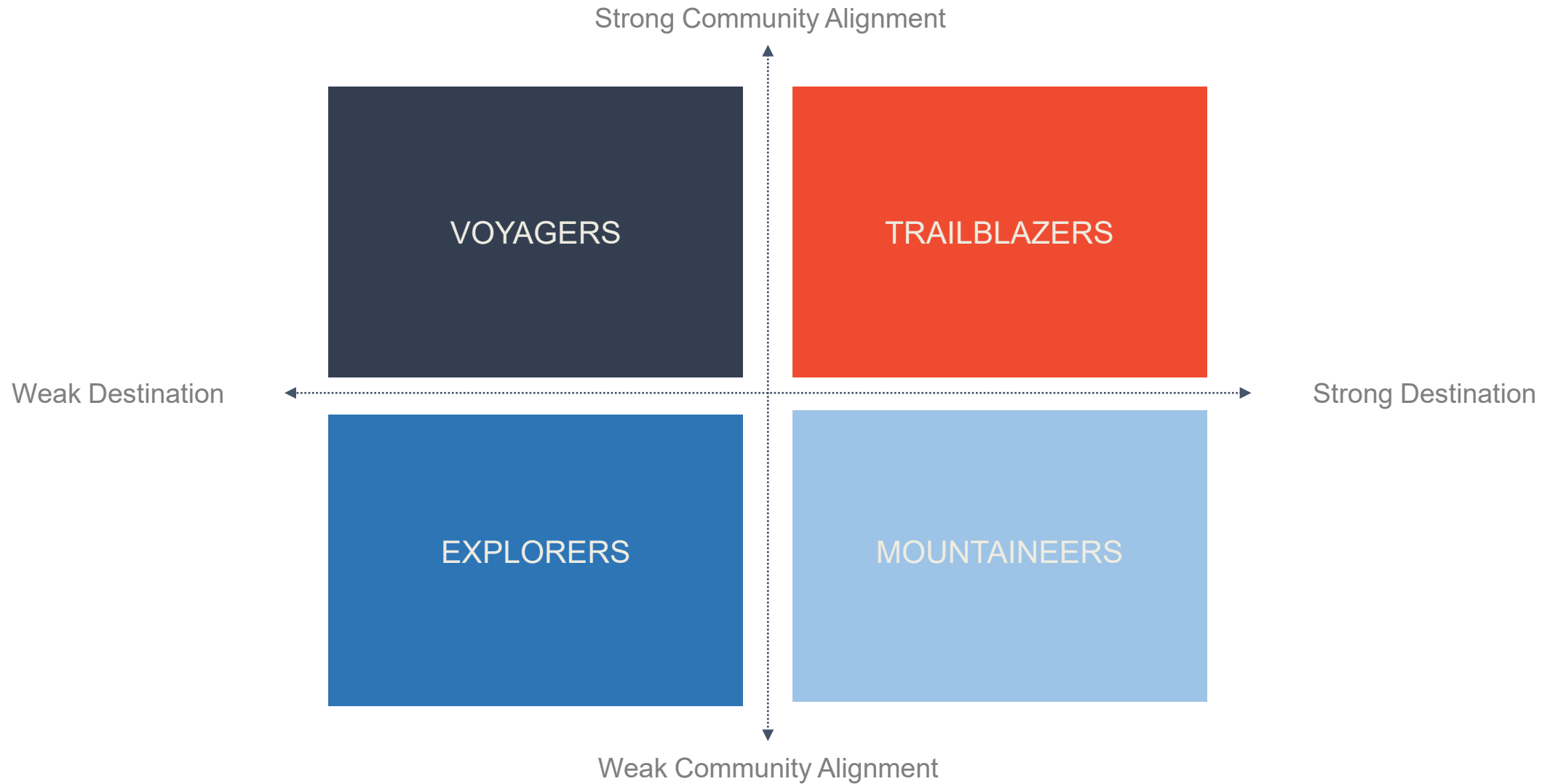
**Destination
Stewardship**

**Community
Alignment**

**Digital
Conversion**

Scenario Model & Destination Assessments

Scenario Model



Destination Strength Variables



Brand



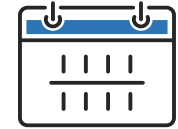
Accommodation



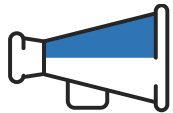
**Attractions &
Entertainment**



**Conventions &
Meeting Facilities**



Events



**Sports & Recreation
Facilities**



**Communication
Infrastructure**



Mobility & Access



Air Access



**International
Readiness**

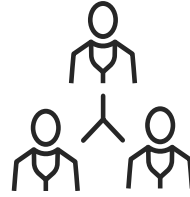
Community Alignment Variables



**Organization
Governance Model**



**Partnership
Strength**



Industry Support



**Local Community
Support**



**Regional
Cooperation**



Workforce



Hospitality Culture



**Policy & Regulatory
Environment**



**Funding Support
& Certainty**



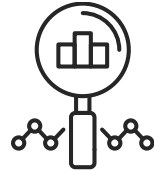
**Economic
Development**

Destination Assessments



350

destinations from 18 countries



225

detailed assessments completed in 11 countries:

USA, Canada, Mexico, Switzerland, Colombia, Korea, Guatemala, Taiwan, Denmark, Brazil, Australia



45

underway or planned, including:

Dominican Republic, El Salvador, Ecuador, South Africa



50

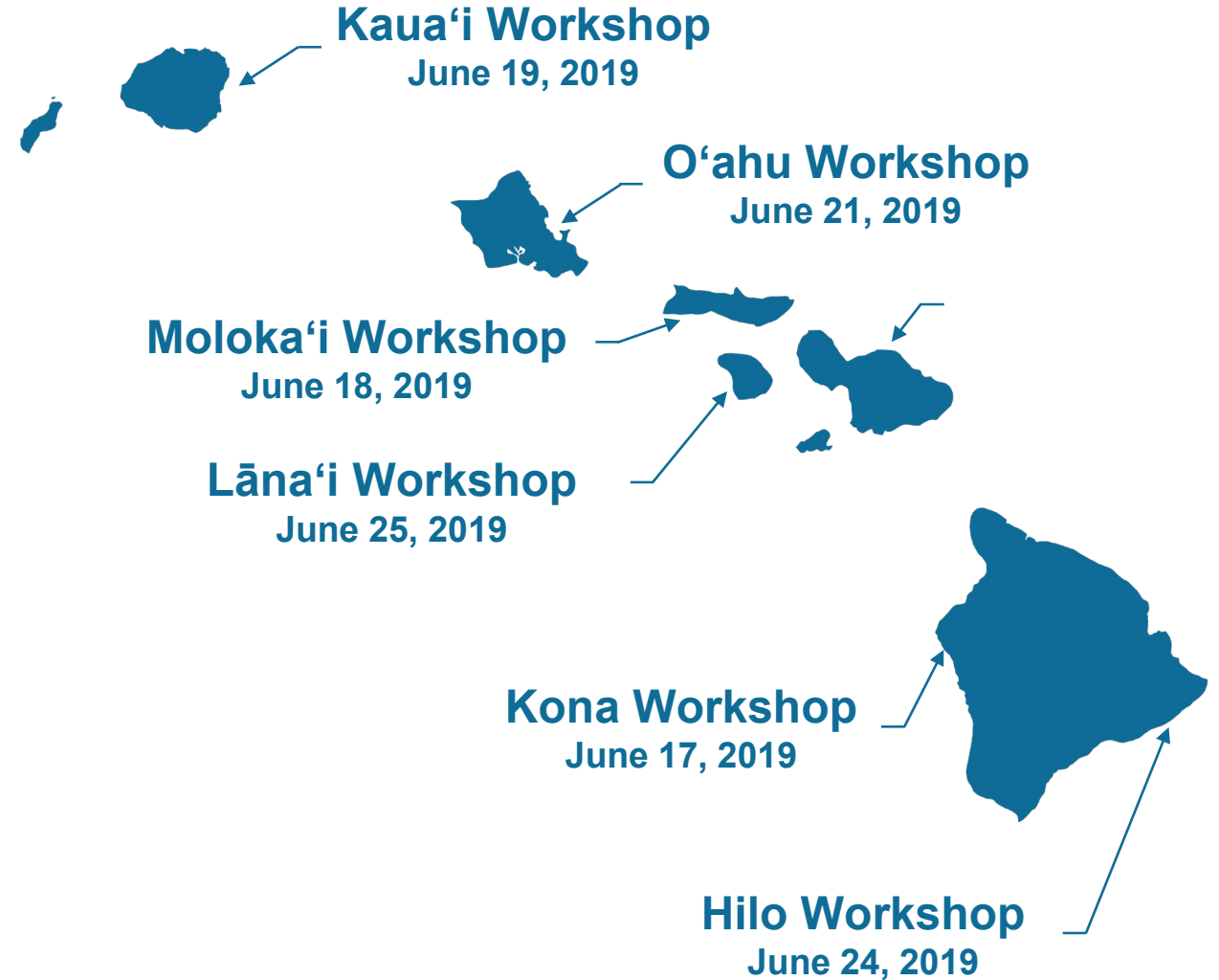
in discussion, including:

Peru, Argentina, Dubai, Germany, Honduras, Chile, New Zealand, United Kingdom, Thailand, Micronesia, Philippines, Russia, Ghana, Nigeria

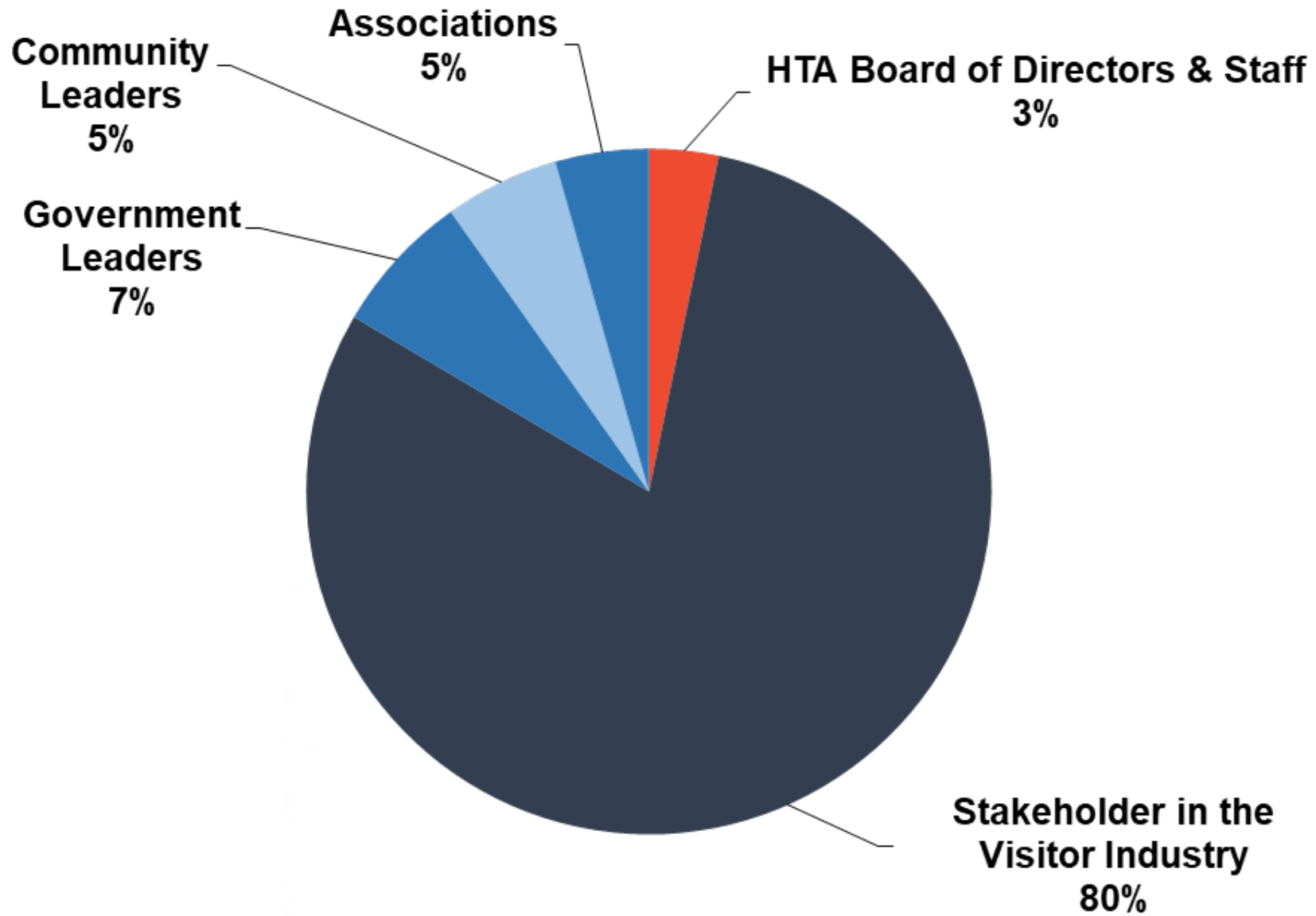
Hawai'i Assessment

Workshop Schedule

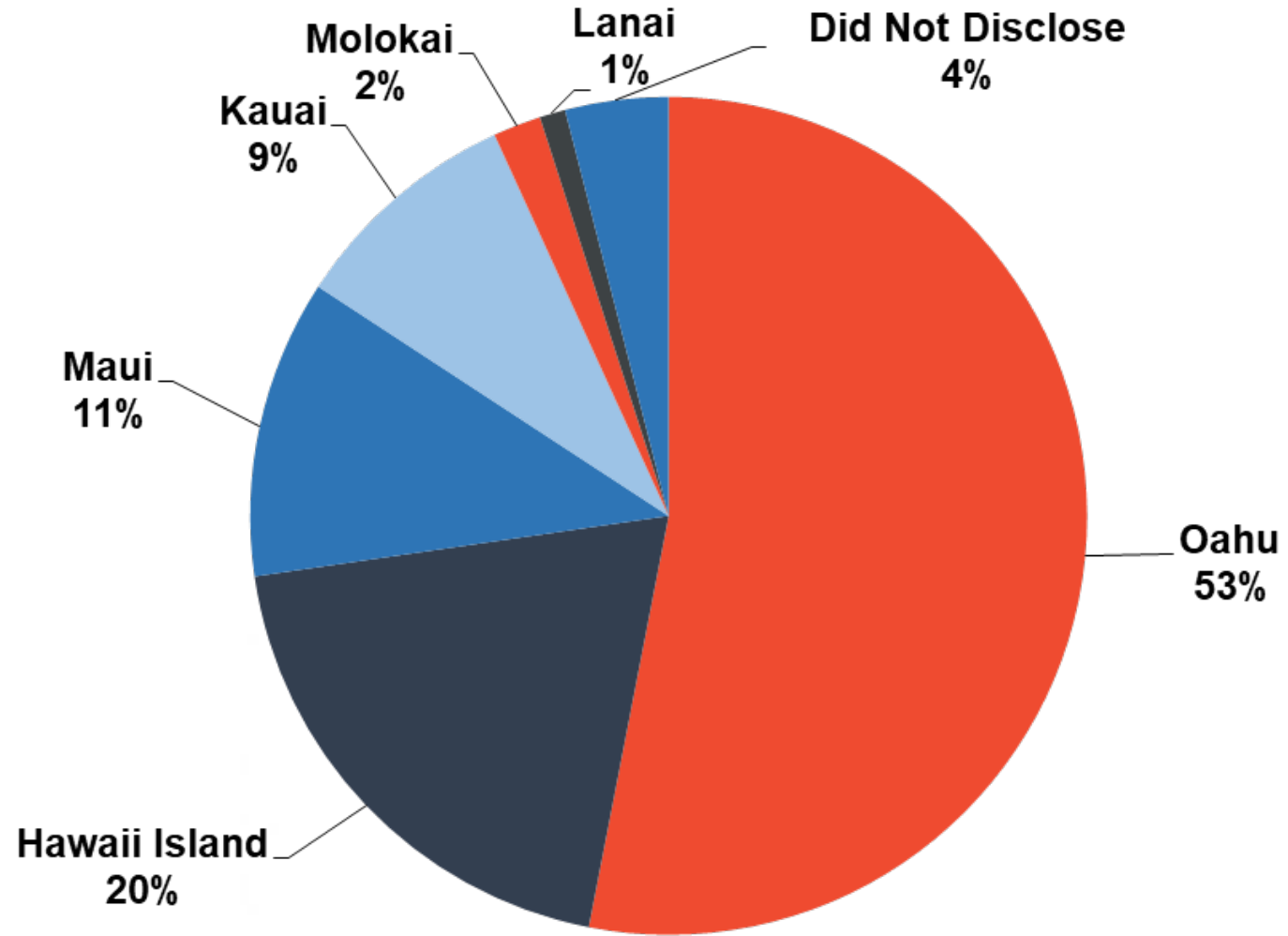
June 17	Kona
June 18	Moloka'i
June 19	Kaua'i
June 20	Maui
June 21	O'ahu
June 24	Lāna'i
June 25	Hilo



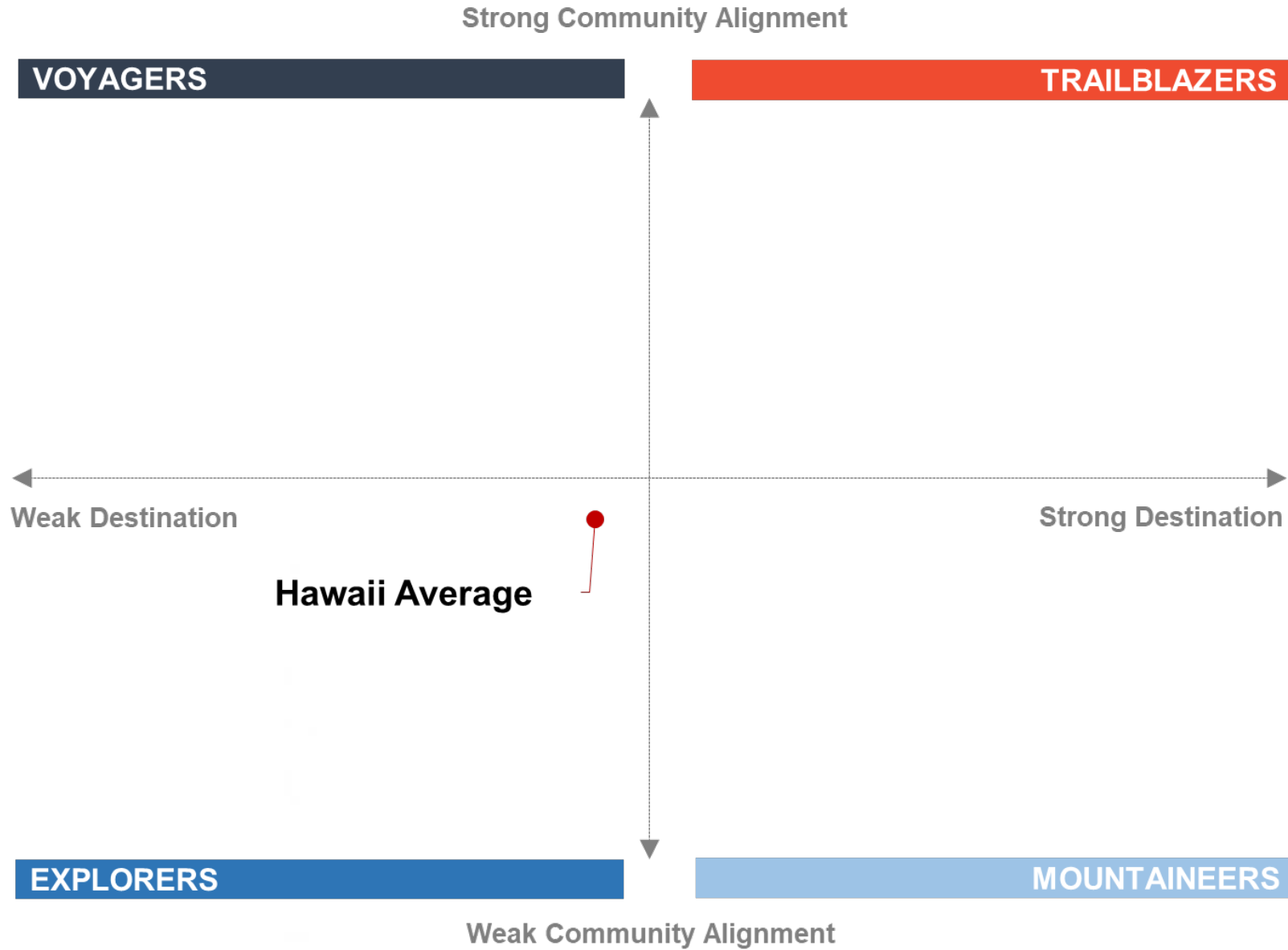
703 Responses



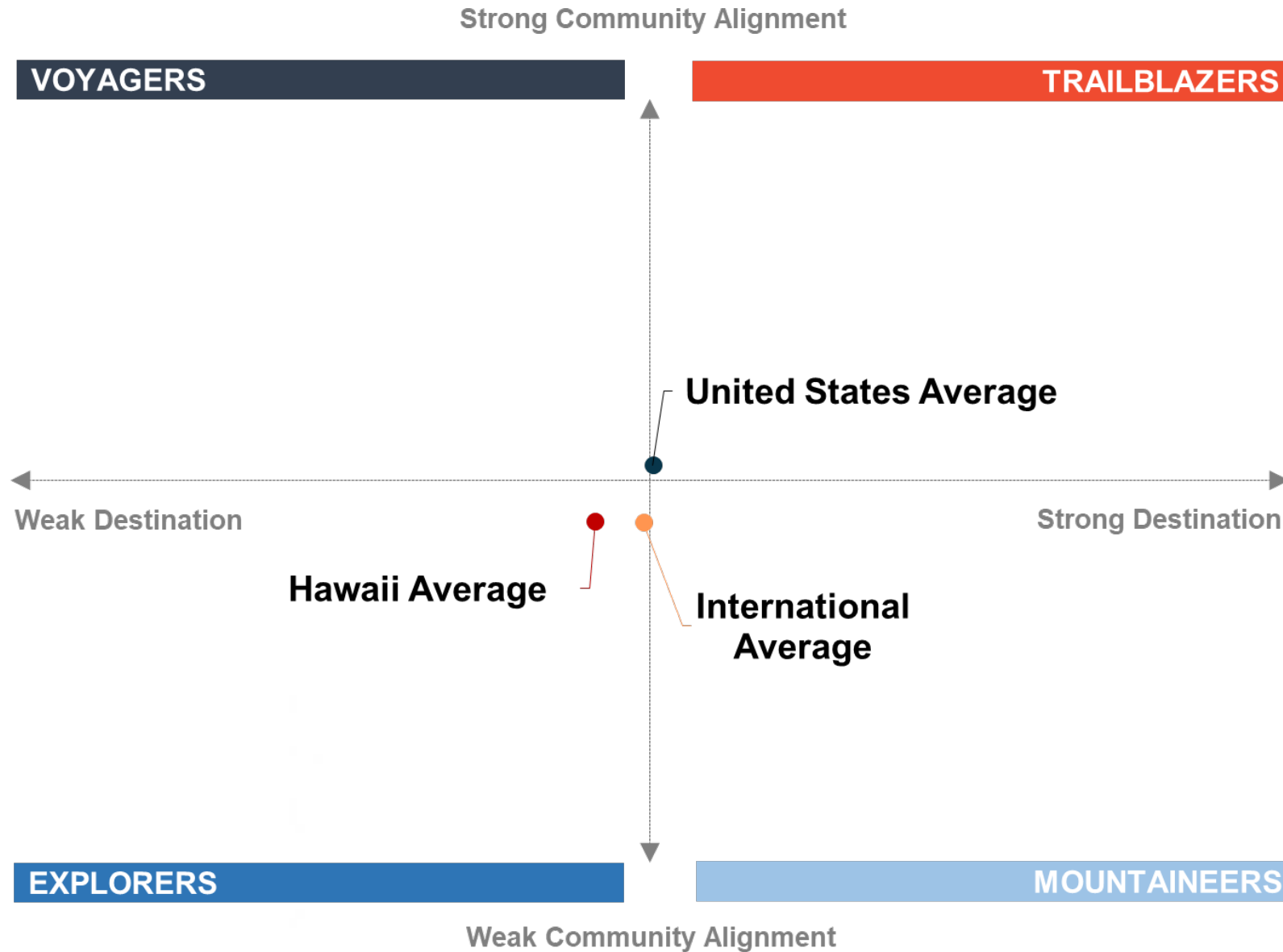
By Location



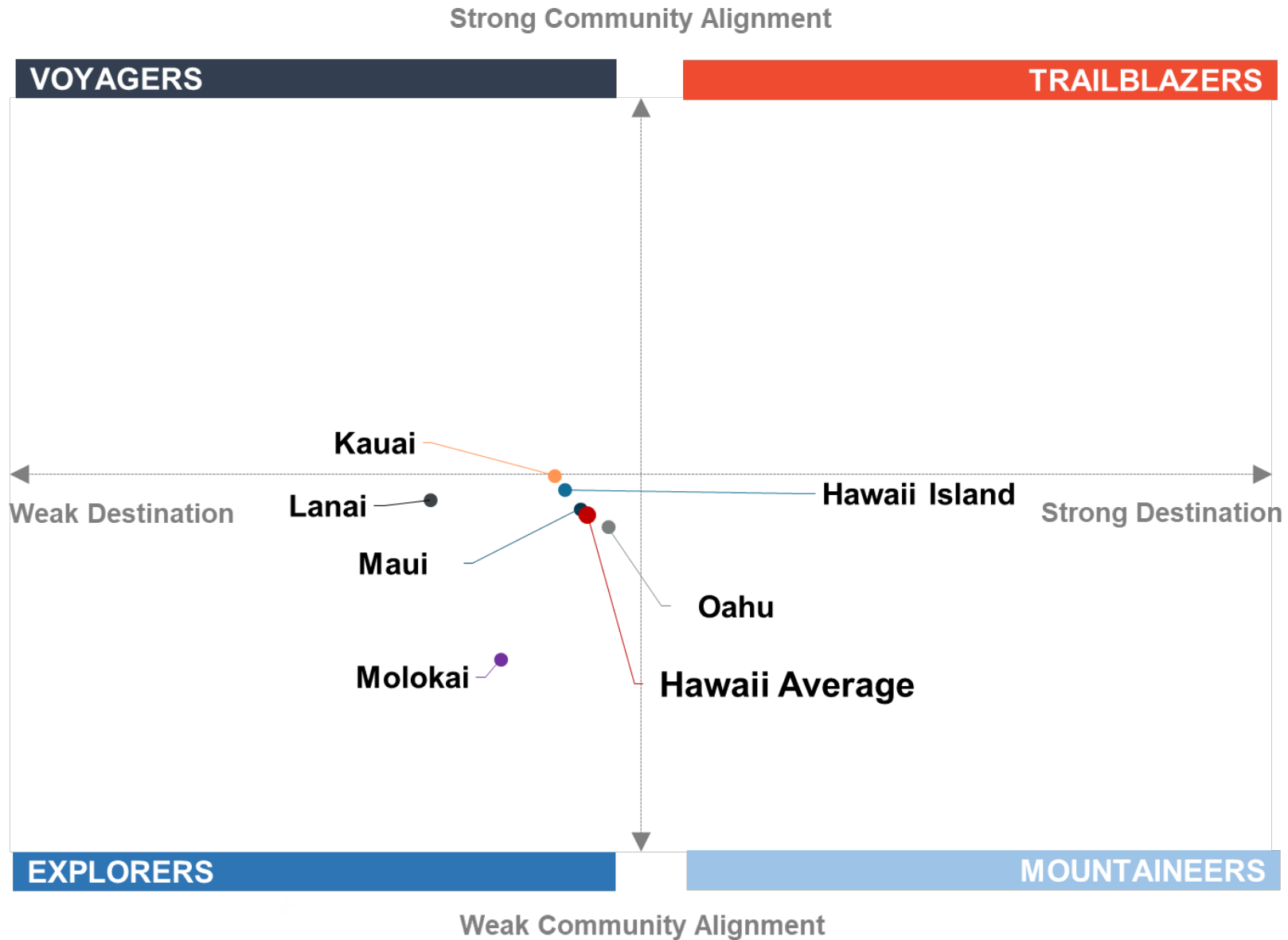
Overall Assessment



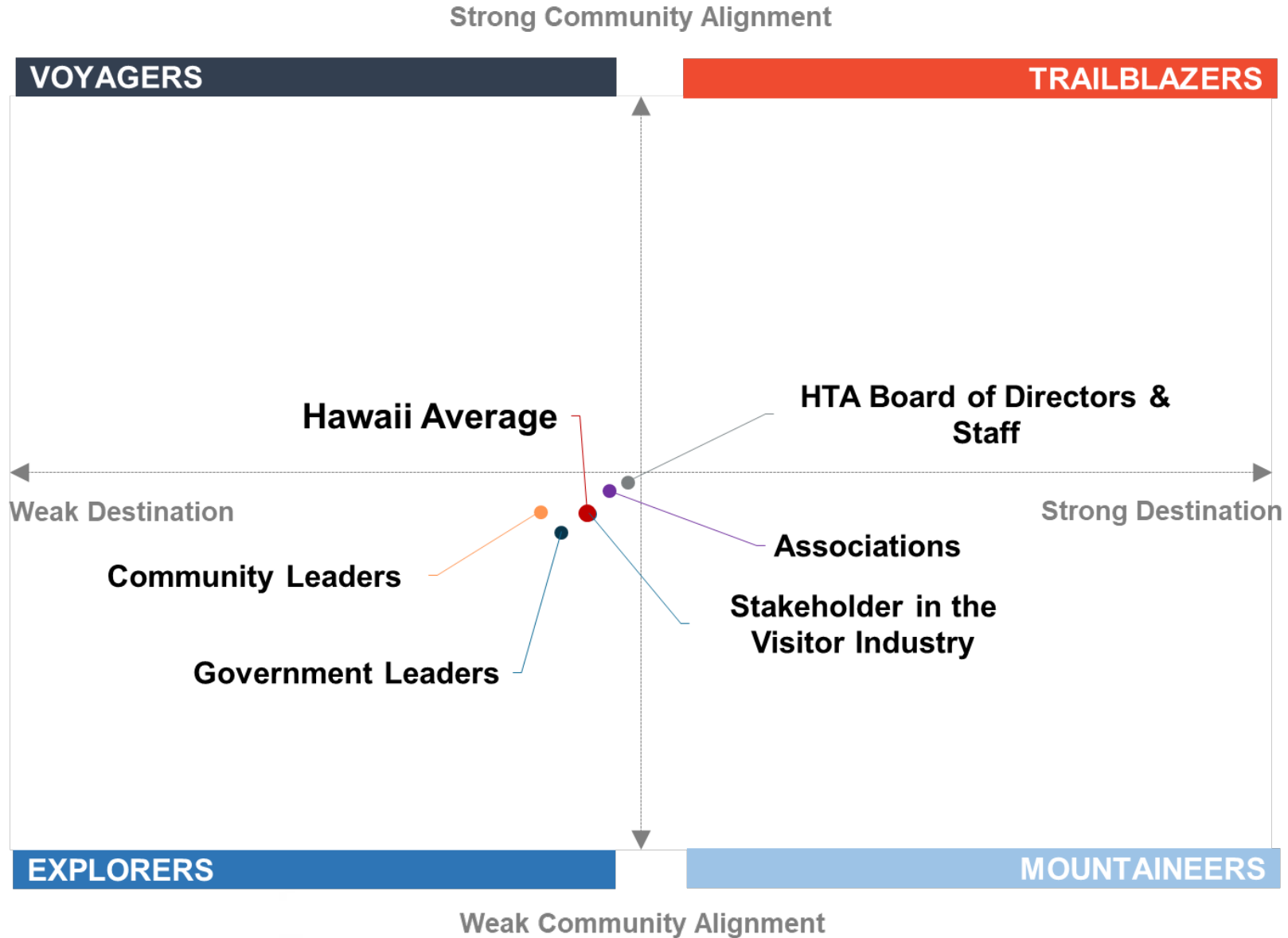
Overall Assessment



By Location



Stakeholder Groups



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.

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	9.1%	11.2%	3.50	3.28	0.78
Policy & Regulatory Environment	10.1%	10.7%	3.48	3.32	0.47
Industry Support	10.0%	10.7%	3.69	3.55	0.58
Organization 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.

Destination Strength

- Unique neighborhoods
- Mobility & access
- Airport quality
- Interisland air service
- Connectivity
- Innovative brand
- Sporting facilities
- Camping facilities
- Multi-language wayfinding

Community Alignment

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

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



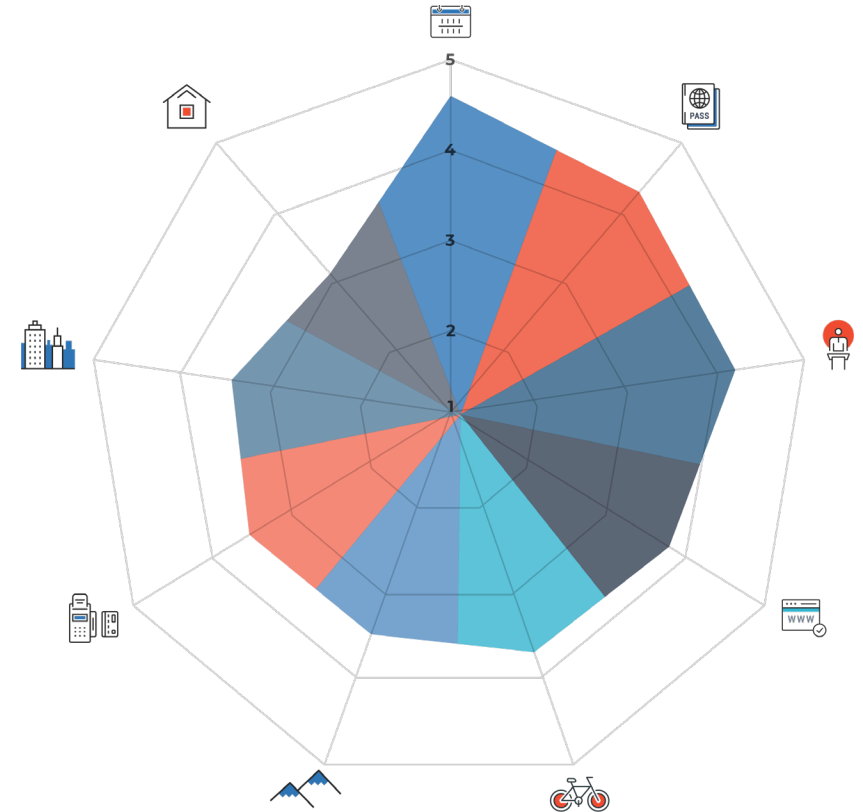
Visitors don't impede local residents' enjoyment of local amenities



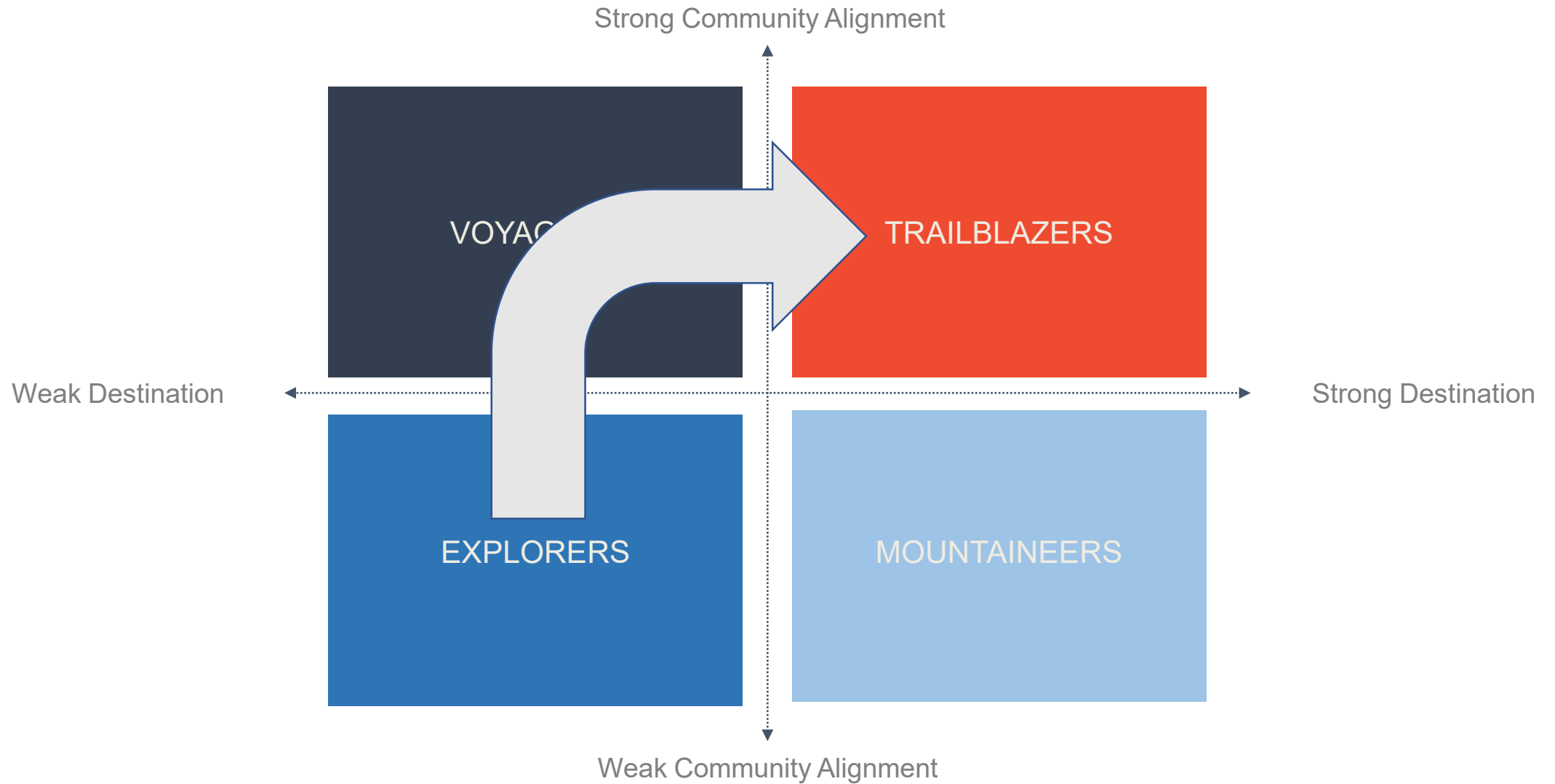
Has adequate capacity and infrastructure to accommodate visitors



Sharing economy capacity is not impeding quality of life for locals



Becoming a Trailblazer



Thank You.

paul.ouimet@nextfactorinc.com