

Island Preferences/Perceptions Study Results

A Presentation to the
Travel and Tourism Research Association – Hawai'i Chapter



by
Christopher Kam
Director, Market Trends
Hawai'i Visitors and Convention Bureau

October 3, 2007

Island Perceptions Study - Background

- **Research Objective:** Develop better understanding of U.S. visitors' perceptions and brand preferences for each of Hawai'i's major islands (i.e., Differences? Similarities?)
- Ongoing quarterly survey conducted online by TNS among TNS Plog panelists who have visited Hawai'i in the previous 12 months
- Following results based on 1,428 completed responses in the first two quarters of 2007

Island Perceptions Study - Background

Q) For each attribute listed below, please select the destination(s) you prefer, whether you have been to the destination or not:

- It has unique scenery unlike anywhere else.
- It is romantic.
- It is a great place to golf.
- It offers a wide variety of recreational activities.
- It is a great place for entertainment activities (theaters, concerts, galleries).
- It's a good place for family and children.
- The history and culture is intriguing.

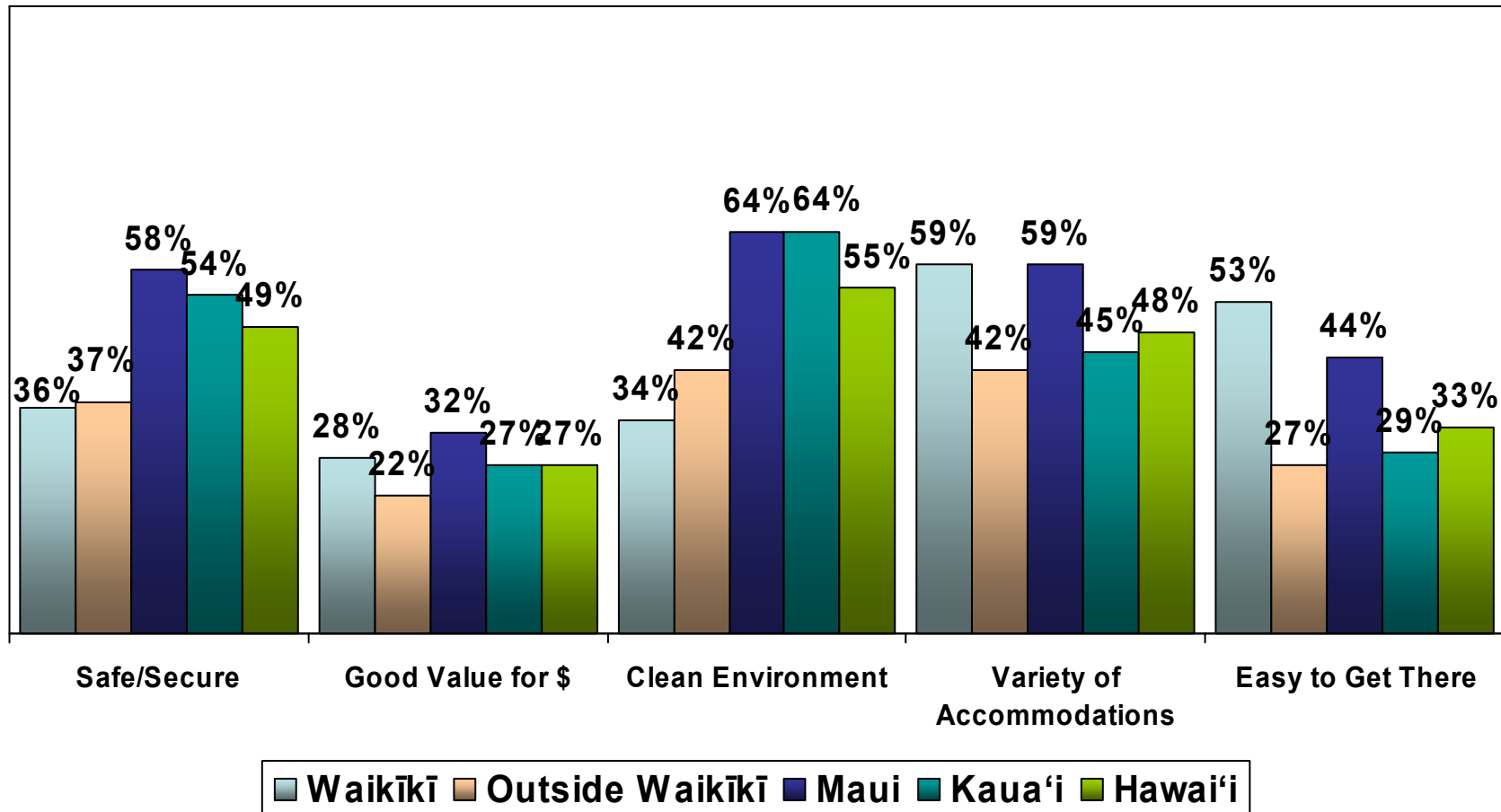
Island Perceptions Study - Background

Respondents queried on 28 individual destination attributes, which have been found to cluster around the following five categories:

- Easy, Value, Safe, Clean
- New Discoveries/Unique
- Entertainment/Nightlife
- Active Recreational Choices
- Romantic, Family, Friendly, Relaxing

Easy, Value, Safe, Clean

Q) Please select the destination(s) you prefer for:

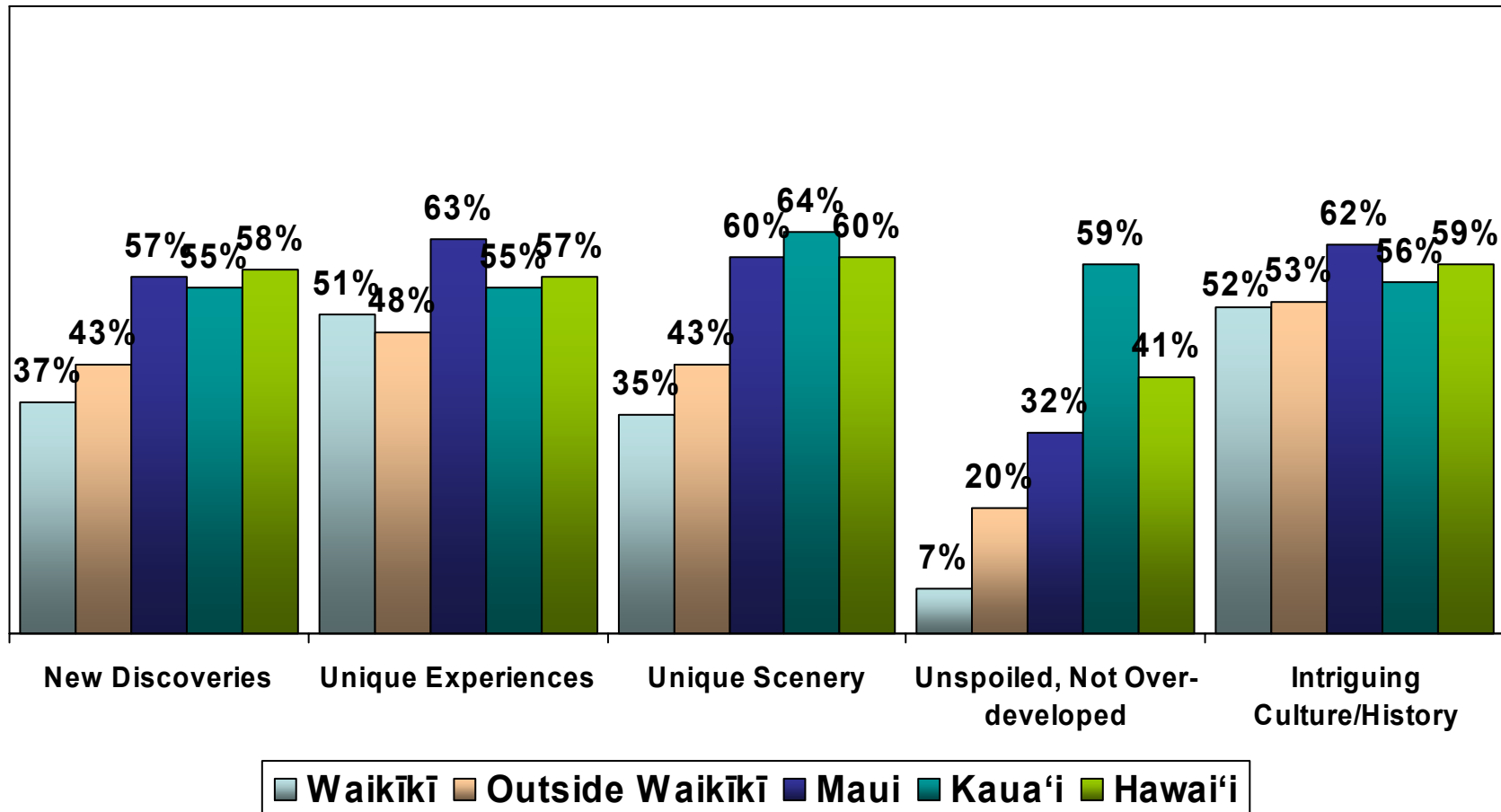


Source: TNS Island Perception Study, 2007 YTD through Q2



New Discoveries/Unique

Q) Please select the destination(s) you prefer for:

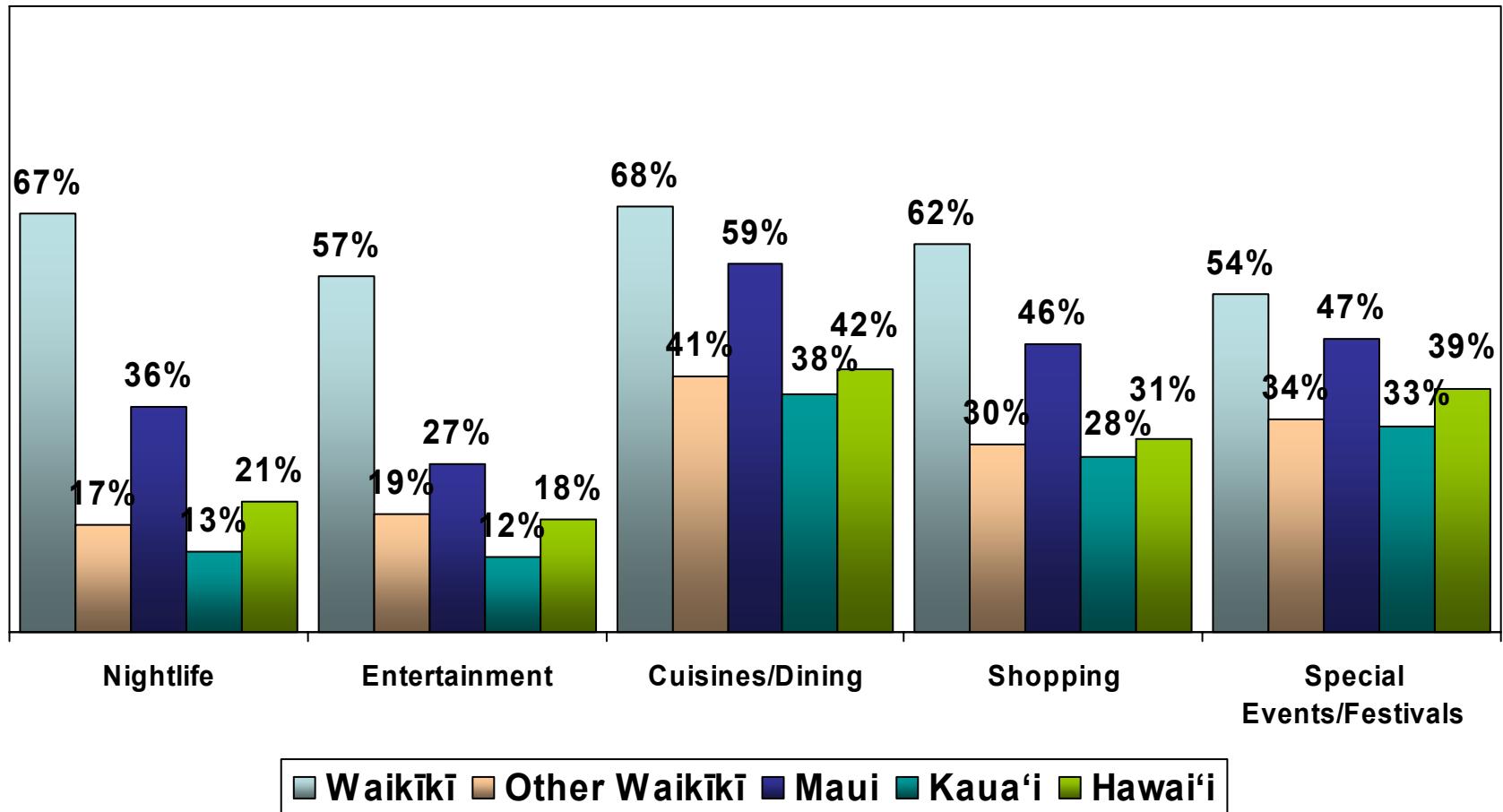


Source: TNS Island Perception Study, 2007 YTD through Q2



Entertainment/Nightlife

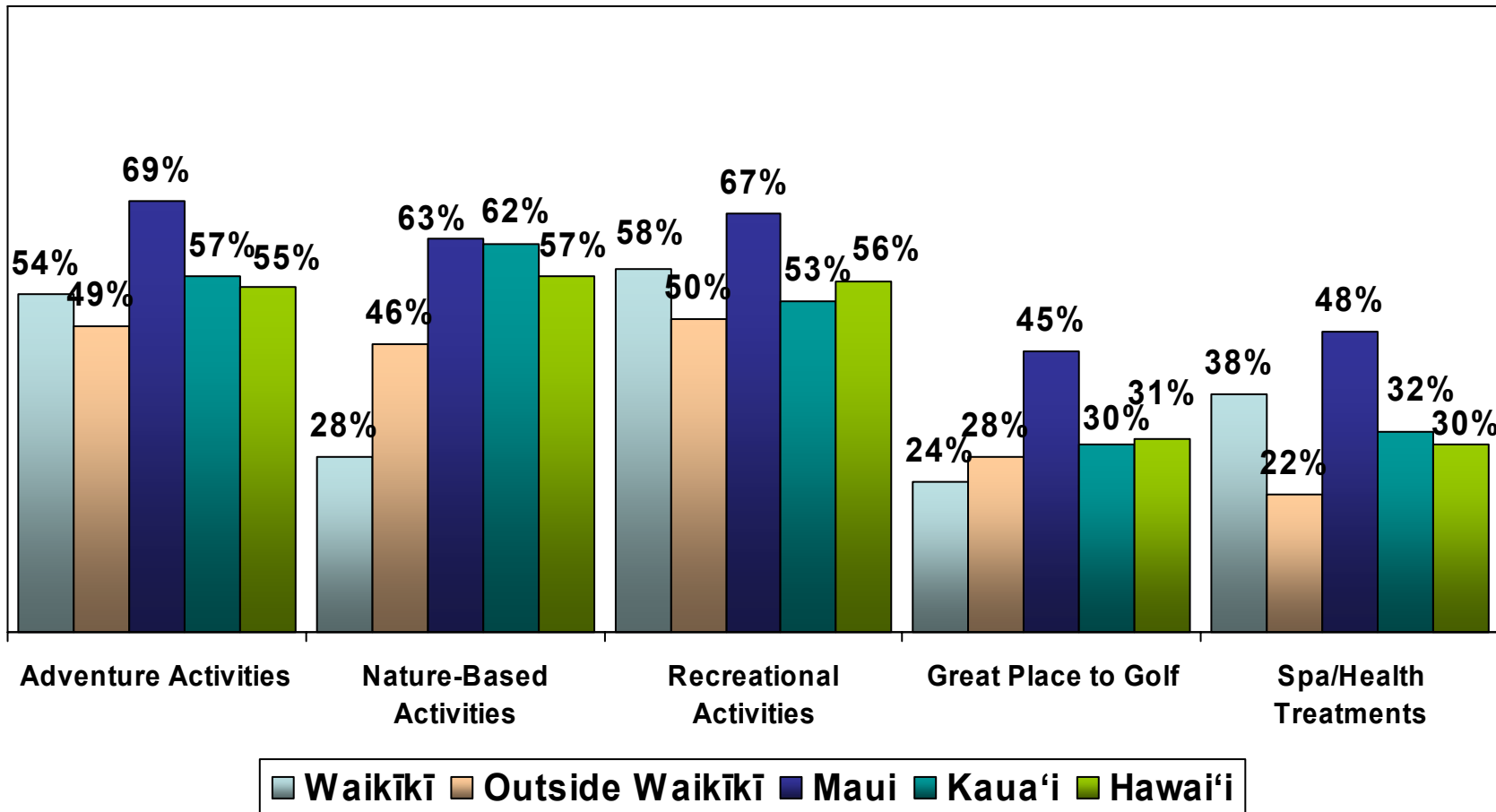
Q) Please select the destination(s) you prefer for:



Source: TNS Island Perception Study, 2007 YTD through Q2

Active Recreational Choices

Q) Please select the destination(s) you prefer for:

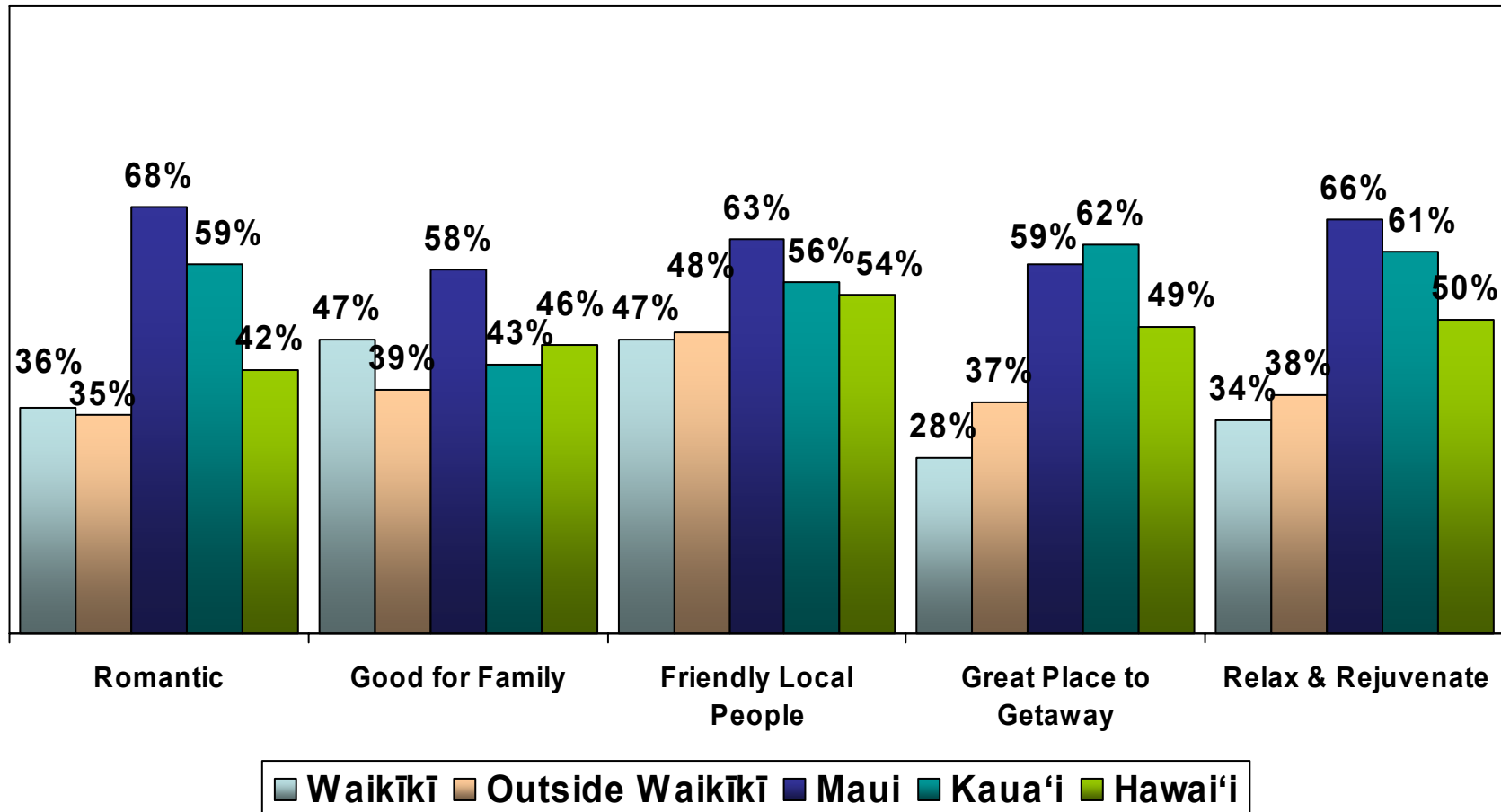


Source: TNS Island Perception Study, 2007 YTD through Q2



Romantic, Family, Friendly, Relaxing

Q) Please select the destination(s) you prefer for:



Source: TNS Island Perception Study, 2007 YTD through Q2



Conclusions – What does this all mean?

- Island preferences of recent Hawai'i visitors reveal insights into the brand characteristics that differentiate the state's major islands in the minds of travelers

Waikīkī (O'ahu)	Diversity of assets – A balance of entertainment, nightlife, cuisine and outdoor recreation/adventure activities
Maui	Outdoor recreational activities, romance, good for families
Kaua'i	Great place to get away from it all, rest and relaxation, nature-based activities, romance
Hawai'i	New discoveries, unique scenery, intriguing culture/history

Source: TNS Hawai'i Marketing Effectiveness Study, 2007 Q2 Results

Conclusions – What does this all mean?

- Need for Additional Research/Analysis...
 - Geographic breakouts (US West/US East)
 - Segmentation by number of visits to Hawai'i
 - Segmentation by age of traveler
 - Island preferences among non-Hawai'i visitors
 - Island preferences by islands visited
 - Island preference by lodging type used
 - More.....?

Mahalo!