



Hawaii Convention Center
1801 Kalākāua Avenue, Honolulu, Hawaii 96815
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David Y. Ige
Governor

John De Fries
President and Chief Executive Officer

*HĀLĀWAI KŪMAU O KE KŌMIKE ALOWELO
KE'ENA KULEANA HO'OKIPA O HAWAI'I*

**BRANDING STANDING COMMITTEE MEETING
HAWAI'I TOURISM AUTHORITY**

Po'akolu, 28 Kepakemapa, 2022, 1:00 awakea
Wednesday, September 28, 2022 at 1:00 p.m.

Hālāwai Keleka'a'ike
VIRTUAL MEETING

Hiki i ka lehulehu ke hālāwai pū ma o ka ZOOM.
Webinar will be live streaming via ZOOM.

E kāinoa mua no kēia hālāwai:
https://us06web.zoom.us/webinar/register/WN_PpQ2zdgURpqGH3BfzZ1iAA

*Ma hope o ke kāinoa 'ana, e ho'ouna 'ia ka leka uila
hō'oiā iā 'oe nona ka 'ikepili ho'oku'i hālāwai.*
**After registering, you will receive a confirmation email
containing information about joining the webinar.**

Papa Kumumana'o
AGENDA

1. *Ho'omaka a Pule*
Call to Order and Pule
2. *'Āpono i ka Mo'o'ōlelo Hālāwai*
Approval of Minutes of the June 15, 2022 Branding Standing Committee Meeting
3. *Hō'ike'ike na Mika. Chris Kam no ka hopena o ka Marketing Effectiveness Survey*
Presentation by Mr. Chris Kam on Results of the Marketing Effectiveness Survey



4. *Hō'ike'ike, Kūkā, a Hana e Hāpai 'ia ai ka 'Āpono 'ia o ka HTA Sports Program Strategy a Ho'okūkū Noi*
Presentation, Discussion, and/or Action to Recommend Approval of the HTA Sports Program Strategy and RFP
5. *Mo'olelo no ka Ho'okūkū Noi no lāpana, Kanakā, a me nā Wahi Mākeke Nui o Kina*
Update on the RFPs for Japan, Canada and China Major Market Areas
6. *Hō'ike'ike a Kūkā no ke Kikowaena Hālāwai o Hawai'i me ka nā'ana MCI Targets a me ka Pace Report*
Presentation and Discussion on the Hawaii Convention Center and MCI Targets Review and Pace Report
7. *Ho'oku'u*
Adjournment

*** *'Aha Ho'okō: Ua hiki i ka Papa Alaka'i ke mālama i kekahi hālāwai kūhelu i kū i ka Hawai'i Revised Statutes (HRS) § 92-4. E mālama 'ia kēia hālāwai kūhelu nei ma lalo o ka § 92-5 (a)(4), § 92-5 (a)(8) a §201B-4(a)(2) no ka pono o ko ka Papa Alaka'i kūkā a ho'oholo 'ana i nā nīnūnē a nīnau i pili i ko ka Papa Alaka'i kuleana me ko ka Papa Alaka'i loio. He hālāwai kūhelu kēia i 'ole paulele 'ia ka 'ikepili a i mea ho'i e mālama kūpono ai i ko Hawai'i 'ano, he wahi i kipa mau 'ia e nā malihini.*

*** **Executive Session:** The Board may conduct an executive session closed to the public pursuant to Hawaii Revised Statutes (HRS) § 92-4. The executive session will be conducted pursuant to HRS § 92-5 (a) (2), § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) for the purpose of consulting with the board's attorney on questions and issues pertaining to the board's powers, duties, privileges, immunities, and liabilities; to consider hiring and evaluation of officers or employees, where consideration of matters affecting privacy will be involved; and to discuss information that must be kept confidential to protect Hawaii's competitive advantage as a visitor destination.

Kono 'ia ka lehulehu e nānā mai i ka hālāwai a ho'ouna mai i ka 'ōlelo hō'ike kākau 'ia no kēlā me kēia kumuhana i helu 'ia ma ka papa kumumano'o. Hiki ke ho'ouna mai i nā 'ōlelo hō'ike kākau 'ia ma mua o ka hālāwai iā carole@gohta.net a i 'ole ho'ouna i ka leka i ke Ke'ena Kuleana Ho'okipa O Hawai'i, 1801 Kalakaua Avenue, Honolulu, HI 96815 - Attn: Carole Hagihara-Loo. Inā he lawelawe a mea like paha e pono ai ke kīnānā, e ho'oka'a'ike aku me Carole Hagihara-Loo ma (808)-973-2289 a ma ka leka uila: carole@gohta.net e like me ka wikiwiki i hiki, 'a'ole ho'i a ma 'ō aku o ka 'ekolu lā ma mua o ka hālāwai. Inā 'ike 'ia he noi i ka lā ma mua o ka hālāwai, e ho'ā'o mākou e 'imi i ka lawelawe a mea like paha, 'a'ole na'e ho'i e hiki ke ho'ohiki 'ia ke kō o ua noi lā.



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Ua noa pū kēia ho'olaha ma nā kino 'oko'a e la'a ke kope pa'i nui, Braille, a kope uila pū ma ke noi.

Members of the public are invited to view the public meeting and provide written testimony on any agenda item. Written testimony may be submitted prior to the meeting to the HTA by email to carole@gohta.net or by postal mail to the **Hawai'i Tourism Authority, 1801 Kalākaua Avenue, Honolulu, HI 96815** - Attn: Carole Hagihara-Loo. If you need an auxiliary aid/service or other accommodation due to a disability, contact Carole Hagihara-Loo at (808)973-2289 or by email: carole@gohta.net as soon as possible, preferably no later than 3 days prior to the meeting. If a response is received the day before the meeting, we will try to obtain the auxiliary aid/service or accommodation, but we cannot guarantee that the request will be fulfilled.

Upon request, this notice is available in alternative formats such as large print, Braille, or electronic copy.

E like nō me ka 'ōlelo a ke Kānāwai 220, e mālama ana ke Ke'ena Kuleana Ho'okipa o Hawai'i i kekahi wahi e hiki ai i ka po'e o ka lehulehu ke noho a komo pū ma nā hālāwai ma o ka ho'ohana 'ana i ka 'enehana pāpaho (ICT). Aia ana kēia 'enehana pāpaho ma ka papahelu mua o ka lumi ho'okipa i mua o ke Ke'ena Kuleana Ho'okipa o Hawai'i ma ke Kikowaena Hālāwai O Hawai'i. 'O 1801 Kalakaua Avenue, Honolulu, Hawaii, 96815 ka helu wahi.

In accordance with Act 220, the Hawaii Tourism Authority will establish a remote viewing area for members of the public and board members to view and participate in meetings held using interactive conference technology (ICT). The ICT audiovisual connection will be located on the 1st Floor in the Lobby area fronting the Hawaii Tourism Authority at the Hawaii Convention Center at 1801 Kalakaua Avenue, Honolulu, Hawaii, 96815.

2

Approval of Minutes of the
June 15, 2022 Branding Standing Committee Meeting



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**BRANDING STANDING
COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Wednesday, June 15, 2022, at 3:00 p.m.**

Virtual Meeting

MINUTES OF THE BRANDING STANDING COMMITTEE MEETING

MEMBERS PRESENT: Fred Atkins (Chair), Dylan Ching (Vice-Chair), Kyoko Kimura, Ben Rafter, Sig Zane

MEMBER NOT PRESENT: Sherry Menor-McNamara

NON-VOTING MEMBERS: David Arakawa, Micah Alameda, Keone Downing, George Kam

HTA STAFF PRESENT: John De Fries, Keith Regan, Kalani Ka'anā'anā, Marc Togashi, Maka Casson-Fisher, Ross Willkom, Carole Hagihara, Dede Howa, Iwalani Kahooohanohano, Ilihia Gionson, Jadie Goo, Irina De La Torre, Maile Carvalho, Todd Toguchi, Yvonne Lam, Bryant Yabui

GUESTS: Teri Orton, John Reyes, Eric Takahata

ATTENDEES: Brigitte Abbot, Duke Ah Moo, Tina Au, Andrew Bailey, Shu Fen Chang, Henry Cheung, Karishma Chowfin, Michele Choy, Jonathan Chuck, Gina Chun, Yen Chun, Minh Chau Chun, Raynard Chun, Kainoa Daines, Heidi Fujimoto, Rachelle Fushikoshi, Jennifer Gaskin, Brandon Goda, Cindy Gong, Robyn Heaps, Debbie Hogan, Stephanie Iona, Deanna Isbister, Rachel Kaiama, Bill Kennedy, Susie Kim, Sunnie Lasconia,

Josephine Lee, Shari Lee, Robert Lee, Linda Leung, Bella Luke Kalani, Donna Mae Valenciano, James McCully, Malie Miner, Tom Mullen, Sweetie Nelson, Teresa Nguyen, Jasmine Ogata, Catherine Orleans, Patti Ornellas, Kimiko Quan, Allison Schaefer, Noelani Schilling-Wheeler, Ayako Shepherd-Jones, Hai Shi, Taylor Sole, Becky Stark, Dennis Suo, Sa Alexandria Taala, Jamie Tokuno, Michael Troy, Darragh Walshe, Kayo Whitty, Marisa Wong, Thomas Wong, Sherman Wong, Tina Yamaki, Armida York, Robert Yu, Sonny Zhang, Jack Zhang, Lulu Zheng

LEGAL COUNSEL:

Gregg Kinkley

1. Call to Order and Pule

Mr. Casson-Fisher did the roll call. All confirmed in attendance and that they were alone. Mr. Casson-Fisher welcomed special guests, Mr. Reyes, Senior VP, and Chief MCI sales officer from the Meet Hawai'i team, Hawai'i Convention Center (HCC) General Manager, Ms. Orton, and Hawai'i Tourism Japan (HTJ) Managing Director, Mr. Takahata. There were no legislators on the call. Ms. Menor-McNamara was excused from the meeting.

Chair Atkins called the meeting to order at 3:15 p.m.

Mr. Casson-Fisher did the opening protocol.

2. Approval of Minutes of the May 25, 2022, Branding Standing Committee Meeting

There were no questions or comments from members or attendees about the May 25 meeting minutes. Ms. Kimura made a motion to approve the minutes. Mr. Ching seconded. Mr. Casson-Fisher did the roll call, and the motion passed unanimously.

3. Update on RFP 22-01-HTA Hawai'i Destination Brand Marketing & Management Services for The United States Major Market Area

Mr. Regan said HTA is still in the procurement process for the RFP 22-01. It has been publicized, and the debriefing has been completed. HTA is in the remaining phase of the potential protest period. HTA has until Tuesday, and they will continue to monitor and provide information to parties requesting documents or information and will try to fulfill the requests. The award was made to the Council for the Native Hawaiian Advancement. Chair Atkins hoped that as things moved forward and became public, all industry partners, residents, etc., would receive it as soon as HTA could share information. He would like this process to be flawless.

There were no comments from the public.

4. Presentation, Discussion, and/or Action on Hawai'i Tourism China's Brand Marketing & Management Services Contract

Mr. Ka'anā'anā said - Board members have approved the restricted funding to the China market, for \$500,000 for the first two quarters of 2022. He recommends that HTA reduces its presence in China based on current market conditions, such as the insistence on a zero-tolerance COVID policy, and no direct flights. He recommends that the committee recommends a reduction of the China market contract to the full Board. HTA is working with the contractor to determine the wind-down costs subject to the contract. He will have the number before the full Board meeting. In addition, in the fiscal year 2023 (FY2023), an amount of \$120,000 is in line for China, for the calendar year 2023 activities. The current contract is active through December 31, 2022.

Ms. Kimura asked if they are recommending \$120,000 for 2023 as well. Mr. Ka'anā'anā reiterated that the motion is to wind down in 2022. There is a separate agenda item for the FY2023.

Mr. Rafter suggested supporting this as there are no immediate plans for China to build air traffic and said it is a waste of money at this point. Chair Atkins asked Mr. Ka'anā'anā to elaborate a bit more as other state agencies are still working in China and doing programs they have funding for. He asked him to speak about the financial aspect as well.

Mr. Ka'anā'anā said DBEDT still maintains a Beijing office, and there is an opportunity for HTA to partner with the office to maintain a minimal presence. He is evaluating the wind-down cost because, in China, there are labor laws required. He is trying to determine the

most cost-effective option, as severance is very expensive. He is trying to get the analysis for the full Board meeting. In 2023 there is an opportunity to partner with the DBEDT Beijing office. He will find out what DBEDT costs will be if HTA partners with them. Chair Atkins asked if Mr. Ka'anā'anā could get the figures before the Budget meeting, and he said he would.

Chair Atkins concurred with Mr. Rafter's comments. He asked Mr. Ka'anā'anā if he had a timetable for 2023 when they could revisit China's services contract. Mr. Ka'anā'anā said that if market conditions change, anything could happen. HTA has the flexibility to put meaningful funding back into the Chinese market when the time is right. Chair Atkins asked for clarification on the wording of the motion.

Mr. Arakawa made a suggestion for the motion to support the closing down or winding down of the Chinese market, whichever is in the best interest of the HTA.

Mr. Chuck from the audience had a few comments. He said China is important to the travel industry. He said there were 169 million outbound trips before the pandemic, which is growing at 8% per year. He said China is a competitive market, and the topic of branding is important. He understands the difficulty regarding the lack of direct flights and restrictions, but people want to travel, and the demand is high. He recommended that social media actions are kept as is but suggested lowering the tier budget until the market recovers.

Mr. Ka'anā'anā agreed that the Chinese market is important to Hawai'i. He said that HTA's budget has already been cut, which has already minimized their funding. He said it is a tough decision, and they do not want to get out of the market completely, so they are exploring ways to have minimal presence in the market through social media. He said they also invested in the WeChat platforms that they intend to maintain during the restricted state in the market. He thanked Mr. Chuck for his comment.

Ms. Lulu Zheng from the audience, the salesperson from Marriott International Hawai'i Region, is in charge of Korea, China, and South East Asia markets. She looked at the recent transient report on production trends for China, and saw that Ctrip brought 5,000 room nights to Hawai'i, which was double the amount of the Japanese market. She said these Chinese-speaking visitors are not from China only but all over the world and concurred with Mr. Chuck's comments about social media. She hopes there is a presence for social media and influencers to target high-paying luxury guests, especially the ADR for hotels.

Ms. Shu Fen Chang from the Battleship Missouri Memorial also commented. She is in charge of the Chinese market since Air China started direct flights to Hawai'i. She said that at the moment, their mainland Chinese guests are zero; however, the majority of Chinese-speaking guests are from the U.S. mainland, about 10%-15% during peak season. While the USS Missouri has laid off all the Chinese tour guides, it has kept the bi-lingual tour guides and maintained its website and social media to connect with the Chinese agents from mainland China. She said the market would be back once the politics in China is over in 2022 (President Xi's third term). She said whoever has a U.S. Visa will return to the U.S., and they are all high-spending guests.

Mr. Hai Shi, a Chinese travel agent, said he concurred with Ms. Zheng, that the Chinese are everywhere, not just in mainland China. Two weeks ago, he had a private VIP jet from China with ten people who stayed at Halekulani for one week. The majority of the guests stayed in the suites and spent a lot of money in the best restaurants, etc. He hopes HTA will keep some of the minimum maintenance for this market with lots of potentials. Travel agents need the government to support them to show how Hawai'i is doing. He said he does social media daily, and the feedback is that Chinese people miss Hawai'i. He suggested that instead of canceling the costs, HTA maintains costs to help travel agents survive. He said he has student groups studying at the University of Washington, and due to the pandemic, they cannot go back to China, so they are planning on visiting Hawai'i. He said they are high-spending visitors; in this case, they spent eight days in Honolulu and the Big Island.

Chair Atkins said he would take all the comments into consideration as they move the item to the Budget Standing Committee. Chair Atkins said a common thread from the comments is that business is coming from outside China for Chinese people coming from the mainland. He asked Mr. Ka'anā'anā to elaborate on the MMA work.

Mr. Ka'anā'anā concurred with Chair Atkins that Chinese travelers come from other U.S. destinations. They should be exposed to the messaging in the other MMA markets. He asked Mr. Reyes to elaborate.

Mr. Reyes said to Mr. Ka'anā'anā's point that they work closely with the global marketing teams. He said visitors are coming to Hawai'i for meetings and leisure. He said there is a lot of opportunity on the mainland, they are always promoting the messaging.

Ms. Lulu Zheng spoke about the zero COVID policy for China, She said that when there is a lockdown, people spend more time on their phones and that it is the best time to promote

Hawai'i over social media. She said people would come out once the market is open, but how they promote Hawai'i is very important, as other markets are gradually opening up.

Chair Atkins thanked everyone for their comments. He asked Mr. Ka'anā'anā if they would be cutting down their social media. Mr. Ka'anā'anā said they would propose a minimal presence in the market that would include social media. He said the Branding Standing Committee had adopted and approved \$500,000 through the year's first two quarters. Part of the approval was for the WeChat mini-programs for B2B and B2C. He said they have the asset being developed but are not yet done. He said the social media presence is part of the \$120,000 he is proposing for FY2023.

There were no further comments.

Chair Atkins asked if they should wait to hear Mr. Ka'anā'anā's final decision before they make a motion. Mr. Ka'anā'anā said the final decision is with the full Board. He said if the Branding Standing Committee does not take specific action today, it does not preclude the full Board from deciding on June 30, 2022. Mr. Kinkley confirmed that as correct. Chair Atkins said if they make a recommendation, they could discuss it. The Budget Standing Committee would also be making a recommendation based on the input after the discussion analysis.

Mr. Ka'anā'anā asked for a motion from the Branding Standing Committee that recommends the intent of winding down HTA's presence in China in 2022, subject to the full Board approval later. HTA will make its funding determination as part of the budget for 2023.

Mr. Ching asked Mr. Kinkley to clarify Mr. Arakawa's motion suggestion. Mr. Kinkley said Mr. Arakawa's motion was legally sufficient. If the committee does not have anything positive to defer it, they may not need to do anything, but said what Mr. Ka'anā'anā was suggesting is fine.

Mr. Arakawa said Mr. Ka'anā'anā's recommendation should remain, but what he would add is that they support HTA exploring the cancellation or the winding down of the contract with China, whichever is in the best interest of HTA, or any other option in the best interest of HTA. He said there could be three options but that they should not remove the cancellation option.

Chair Atkins said they are not in the cancellation phase. He recommends that it is too harsh to talk about the cancellation from a messaging standpoint, as they had not looked at the DBEDT opportunities yet.

Mr. Arakawa said negotiations usually become different if there is the option to cancel.

Chair Atkins spoke about Japan and the good relationship HTA has with them. And the China situation is similar to Japan last year when no Japanese visitors came in at that time but we kept the contract for market education and messaging and now the Japanese market comes back nicely.

Mr. Ka'anā'anā suggested a motion to direct staff to explore options to reduce, to a minimum presence, of the Hawaiian Islands brand in China. That way, HTA is directing Mr. Ka'anā'anā to do the research, and then before the BFCC, they would receive his detailed recommendation.

Mr. Kinkley said the Branding Standing Committee does not have the authority to tell Mr. Ka'anā'anā to go ahead but that they recommend that the full Board gives the authority. He concurred with Chair Atkins. He said anything else would be moot by the time it goes to the full Board meeting.

Ms. Kimura asked if the recommendation was for 2022, and Mr. Ka'anā'anā said that was correct. The 2023 budget would be a separate item in the Budget Standing Committee meeting.

Ms. Kimura made a motion to recommend to the Board that they explore the possibility of reducing the China market for 2022. Mr. Ching seconded. Mr. Casson-Fisher did a roll call, and the motion passed unanimously.

5. Presentation and Discussion by HVCB Senior Vice-President, Chief MCI Sales Officer John Reyes, and Hawai'i Convention Center General Manager Teri Orton on Global MCI Initiatives

Ms. Orton spoke about the May financials for the HCC. The recent events for May and June 2022, included the Jump Dance Convention 2022, and a cheerleading competition, with 340 attendees. They had nine Commencement ceremonies. A significant event is Monet, the Immersive Experience, running through July 31, 2022, anticipating 100,000 attendees (ongoing). Definite city-wides to date for FY2022 are in January 2022, International Dairy Queen (IDQ), and a volleyball tournament. The Associate for Asian Studies had over 2,000 delegates in-house in March 2022. Material Research was in May 2022, which had around 4,000 attendees. For FY to date, the economic impact is around \$58.7 million that the meetings brought to Hawai'i, as well as \$6.8 million in tax revenue.

Ms. Orton spoke about upcoming events for June 2022. The Joy of Sake is a repeat customer with around 1,000 attendees. The Active Senior Expo is coming up in June 2022, with about 11,000 attendees. The Goldschmidt Conference is taking part in the second week of July, anticipating 2,500 attendees. Some definite city-wide bookings for the remainder of the year include a basketball tournament, Goldschmidt in July 2022, Applied Superconductivity Conference in October 2022 with about 1,800, and AMA in November 2022. The anticipated economic impact of the four events is \$53.8 million, and the tax generation is about \$7 million to close 2022.

Ms. Orton highlighted some of the local business. She said many local meeting planners and organizations returned to the HCC to hold their events, etc. For June 2022, there are eighteen events, some running for multiple days. For the next two to three months, there are no dark days. This is in addition to the Money Exhibit in-house. For July 2022, they have seventeen events. For August 2022, another seventeen events are also running over multiple days. She spoke about tentative business. Young at Heart Expo is a big local event, as well as Na Kupuna Nights, a monthly concert. She mentioned advertising where they are promoting their Holiday Pa'ina, and their holiday menu for locals to consider HCC as a venue for Christmas parties or other celebrations.

She turned the floor over to Mr. Reyes. He said it is important to give the updates to show their primary focus is to fill the HCC with local effort, combined with Meet Hawai'i. He spoke about the Global MCI team. They have several teams within the Meet Hawai'i team. There is a city-wide sales team. Many of the senior directors, Ms. Garcia, Ms. Nudo, and Ms. Whitehead, are in San Francisco. Their primary focus is to book city-wide business and increase those numbers. Single property also has a seasoned team, Ms. Tasaka in O'ahu, Ms. Parkins in Virginia, and Ms. Dever in Chicago. The city-wide and single property sales teams work closely together. Meet Hawai'i acquired the global MCI contract in January, headed by Mr. Koh in Asia/Oceania. The directors are, in Japan, Mr. Hachiya, Ms. Kim in Korea, and recently Mr. Phadungkiatipong, in Oceania. Mr. Koh is doing a separate update for Asia and Oceania as they are important markets for Hawai'i. He mentioned the services and support team.

Mr. Reyes spoke about priorities and activities and showed the report for short-term bookings. They are trying to optimize placement from 2023 to 2026. He said a lot of conversation about China was being targeted, so they are looking at high-value city-wide customers, Midwest and East Coast, corporate bookings for short-term, and filling in the sports groups. He said it is important to have a targeted approach. For priority two, it is long-

term. It takes, on average, five years to book a city-wide convention for Hawai'i, so they are looking beyond 2027 and future years and focusing on the association market, Asia, and third-party planners. Regarding sales activities, it is important to be in front of customers.

He said the single property and city-wide team attended the Professional Convention Management Association, a key domestic association that books a lot of city-wide groups and single property. They attended it in New Orleans from June 5 to 8, 2022. Another important market is the Financial & Insurance Conference Professionals in Pasadena from June 22 to 24, 2022. The Meeting Professional International (MPI) attracts many single property businesses in San Francisco. They are also focused on trying to get more corporate meetings to Hawai'i. The Corporate Event Marketing Association will be held at the end of July in Nashville. They are also making Midwest Sales Calls in Wisconsin, Minnesota, and Iowa. He spoke about pace and production. He said their average is to do 300,000 definite room nights. 70% come from single property, and 30% come from city-wide. HTA, Ms. Orton, the hotel community, and Meet Hawai'i worked hard to keep city-wides that were canceled in 2021 and put them back into future years. In 2024 and 2025, the team is on pace. For 2024 and 2025 they are anticipating good years at the HCC, very much focused on the future pace in 2026, 2027, and beyond. Looking at the total city-wide tentative bookings, it is evident that the market is coming back. The team had 10,620 tentative room nights compared to 2021, which is up by 217%. Also, from 2021 to 2022, they have narrowed the gap on city-wides.

Definite room nights were 16,310 in May 2022. The previous year they had none. In 2022 there were almost 30,000 room nights on the books for future years. Total single property is \$38,571 in May 2022 compared to May 2021, off by 15% year and date, ahead by 11%. The definite room night production has 19,313 compared to 2021, up 190% from 2021. A lot of what they are looking to do compares to 2019, as that was the last normal production year before COVID.

City-wide tentative bookings were only off by 12% compared to 2019. In May 2022, compared to May 2019, there were 16,310 versus 934, which was up 51% in production. Single property productions in May 2022 compared to May 2019, were minus 53%, but up by 35% year to date. The definite room nights were 19,000, up compared to 2019. He is confident that the team will be able to close the gaps. He said the crux of everything is what is in the pipeline. Currently, there are 28 bookings and 254,311 tentative rooms by year-end. He said they are focusing on closing on 112,932 definite room nights.

He spoke about the MCI O'ahu update and said Ms. Orton asked a good question. When they started the report, there were thirteen or fourteen active bookings to close, with around 127,000 room nights. Some business they lost was corporate in 2023, but it was not because of Hawai'i; it was because the corporate customer could not make a decision. He reiterated that it is important to be present in the marketplace and be in front of customers. A few days ago, HVCB was celebrated as the top U.S. Tourism Board by TravelAge West for providing the best travel advisor support. He said that Hawai'i was rated the destination with the highest customer satisfaction in the U.S. and Canada, and that was also by TravelAge West.

Chair Atkins asked if there were any questions. Chair Atkins said it was nice to see the accolades awarded to them. He spoke about two convention groups that went to the Hyatt, Jupiter, with a few hundred people. American Financial was the other convention, with around 550 people. On that night, including bus transportation, sound, and lighting, people from the island also gave back to local vendors. There were five or six vendors paid to bring their products and give them to the people as a gift. The minimum spend was between \$2,500 to \$10,000 in products for each booth. The one night for dinner was worth \$250,000 to \$300,000. 85% was spent on the property. People were hired from Honolulu as well as entertainers. Chair Atkins asked if good food and beverage was being generated in the food kiosk with all the activity at the HCC and Ms. Orton confirmed. For local events and sporting events, the kiosk has been providing an uptick in revenue.

Mr. Reyes mentioned cross-promotion with the global marketing teams and said they had a Japan summit, and Hawai'i was involved with HTJ bringing over customers. They were excited about generating more lead opportunities there. He reiterated that they do have a presence in the market with cross-promotion.

6. Presentation and Discussion on 2022 LPGA Championship Results

Mr. Ka'anā'anā thanked the members for the approval of the \$250,000 to fund the 2022 Lotte Championship. He spoke about the pillars the Board approved. The first was extending the brand image and marketing of Hawai'i as one of the tenants of support for sports programs. It generated over \$620,000 in media value through May 27, 2022. Over 6.5 million people watched the championship across streaming, social media, and website. 550 million households were accessed across 165 global markets. He spoke about the ability to leverage the event among GMTs. They generated \$100,000 in PR media value in the first eight days. They had over 30 social video posts, with over 156,000 video views. LPGA Travel Feature was on the LPGA Women's Network. There were 6 million geo-targeted impressions across the LPGA Digital Network.

He highlighted some of the community benefits. One was free attendance for kama'āina and there were 2,000 kama'āina who got free tickets. It is the only LPGA girls' golf chapter in Hawai'i, and they are launching in June 2022. They will be based out of the Ala Wai Golf Club with The First Tee, in collaboration with Mark Roling, and Michelle Wie. The six LPGA tour players visited Kualoa Ranch to learn about the culture of Hawai'i and plant koa trees. HTA was also able to partner with LPGA, which donated \$50,000 to the Friends of Hawai'i Charity Institute for Human Services and The Arc in Hawai'i. Seven hundred tournament volunteers supported the event, and students from Waipahu High School, Marauder Media, and UH West O'ahu helped in the Media Center.

He spoke about the Economic Benefits. Hawai'i's local businesses were engaged and played an integral part in ensuring the event was a success. The tournament generated \$2.2 million based on the DBEDT's spend calculator. They noted low attendance based on COVID, the fear of exposure, and health concerns. LPGA would like to keep the event in Hawai'i, but is seeking a long-term partnership. He said in the meeting packet is the overview and complete report of the partnership on page 13.

Chair Atkins mentioned that Mr. Reyes and Mr. McCartney had discussions through the DBEDT channels to see how they could leverage business opportunities. Over the next few months, they would see if that came to fruition.

There were no comments from the attendees.

Mr. Ka'anā'anā said the slideshow that he just presented was not in the original meeting packet, but it would be updated after the meeting.

7. Update on HTA RFP 22-06 2022 Sports Program

Mr. Ka'anā'anā said the Branding Standing Committee had approved the \$1.5 million from the sport unallocated line to support the RFP 22-06, which was the 2022 sports program. The procurement was issued. They received a response rate of non-responsiv proposals of 50%, which signaled that the procurement had some issues. He said that has never happened before, so he recommended canceling the procurement, which they have done. They will reissue it. In the interim, they are seeing who is in the events calendar for 2022, and if there is an alternative procurement method under 103D that would allow support in 2022. Mr. Ka'anā'anā said he intends to return to the Branding Standing Committee with a comprehensive sports strategy that outlines four tiers of sports-related events they could

procure for the calendar year 2023 events in the summer of 2022. A new procurement would be issued in the summer of 2022 for events that happened in the calendar year 2023, based on an approved comprehensive sports strategy that will come back to the Branding Standing Committee and the full Board.

Mr. Rafter said they have important sporting events coming up in 2022, including Iron Man, which HTA lost for a year during COVID. He asked if the intent was to support that through an alternative procurement method. Mr. Ka'anā'anā said they are trying to ascertain if there is an alternative procurement method that they could use to support this in 2022. Mr. Rafter asked when they would get a list of events that might be impacted. Mr. Ka'anā'anā said they are working through the list of offers and trying to research to see what HTA can do within the bounds of 103D.

Chair Atkins requested that Mr. Willkom and Mr. Ka'anā'anā go directly to Mr. McCartney to see if they can sole-source for Iron Man. The more time they give Iron Man, the better the ROI will be.

Mr. Ching asked if Mr. Ka'anā'anā foresees any events that will miss any opportunity because of the push for Iron Man. Mr. Ka'anā'anā said that it is possible. Mr. Ching asked if he could get a note on who those were, and Mr. Ka'anā'anā said he had let him know.

There was a question from an online attendee: there are some community enrichment sporting events in 2022; would these events be considered for 2023 without RFP restrictions?

Mr. Ka'anā'anā said that part of the comprehensive sports strategy would include four tiers. The four big tiers are related to marquee level events that are big partnerships, like the Rams or Clippers, signature events just below that, Hawai'i authentic, unique to Hawai'i, and then community level. What he is trying to map out for the Board and the recommendation to the Board is how they go about procuring against the four tiers. The community enrichment program has had a sports niche with smaller community events, such as the bodyboarding events on O'ahu and Kaua'i, and Kaua'i Marathon. The procurement might be some of them at the community level going through the CEP RFP. Hawai'i authentic may have a separate one. Signature events may go through larger, broader signature events. They may also do specific ones for the marquee level, and this may be sole-sourced because of the nature of who they are.

8. Presentation and Discussion by Hawai'i Tourism Japan on Japan Market Update

Mr. Takahata updated everyone on the Japanese Market. The funds for Japan were released in April 2022. They are working on a few things initiative-wise. Moving into summer, they will be able to share the initiatives. Everything is still in negotiation. He spoke about some of the most important economic and political factors. There is a major election on July 10, 2022. He said they do not see any big changes.

The consumer price index rose 2.1% from a year earlier. The average price for gasoline is 168.2 yen per liter, affecting the fuel surcharge. The Japanese yen weakened to levels of 135 yen to 1 USD. He mentioned travel industry trends. On June 1, 2022, Japan increased the entry capacity to 20,000 daily. They are anticipating this capacity to be increased, and eventually done away with. The U.S. CDC, on June 12, 2022, suspended COVID testing. Japan has suspended post-arrival testing from the U.S. from June 1, 2022. The fuel surcharge for June is up \$500 per trip from Japan to Hawai'i, so for a family of four, it will be \$2,000 for fuel surcharges.

There is an increase in direct bookings, outpacing package tours. The channels the bookings are coming through are different. Airlift is increasing every month. For August 2022, ANA has not given their full schedule, so more flights and seats will be coming in. For August 2022 they are currently at half the capacity of what they were pre-pandemic in 2019.

He spoke about the outlook for Q3 and Q4 2022. Direct bookings are outpacing the package tours. There is the continued easing of restrictions for Japan/U.S., which is positive for recovery. The fuel surcharge, they are keeping an eye on. The surcharges are a big concern for the industry, and they need to see how they could work around that. The unfavorable yen/USD rate is a secondary factor to the fuel surcharge. Looking at the DBEDT report, people who visit Hawai'i increase their length of stay. Business-class demand remains strong until year-end. All the Japanese carriers report that the business class is in high demand. He just received news that a company will be introducing a cruise product in Hawai'i, and there will be two weeks on two islands cruise with Norwegian. Each tour costs between \$30,000 to \$50,000.

He said they put some business in the HCC with the Japan summit. At this annual summit, they bring planning people that create the Hawai'i product to Hawai'i, and meet with the stakeholders with B2B sessions to discuss everything. There were about 118 travel agents, 380 matching appointments, and 300 stakeholders, and they took 80 of the attendees from Japan and did a voluntourism initiative, part of mālama Hawai'i. They cleaned up marshes, streams, and rivers.

Ms. Kimura asked if the airlines would resume only half the pre-pandemic numbers throughout the year, or if it would increase from September. Mr. Takahata said that he anticipates when Delta and Hawaiian Airlines come back online, it will increase the flights going forward in August 2022.

There were no other comments or questions.

9. Presentation, Discussion, and/or Action to Recommend Approval of the HTA FY23 Budget

Mr. Ka'anā'anā said the budget included in the meeting packet consists of the recommendation from the eight Board members whom he has spoken with. There are four more members he has to meet with separately the next day. That will complete the staff meeting.

Chair Atkins said they could discuss it if everyone agrees. Mr. Ka'anā'anā said he defers to the Branding Standing Committee about whether they want to proceed with the recommendation or not. He wants to ensure the Committee takes the time to discuss any line items and is happy to answer. The full Board will have the final vote on June 30, 2022. Ms. Kimura said she had a session with Chair Atkins, and she mentioned that they do not know the market six months from now, so she suggested taking some time and putting it into an opportunity line item of the Branding, but she said it is not reflected in the draft budget. Mr. Ka'anā'anā reiterated that these are budget line items that run from 321 through 330, which are country markets. He said if the Committee wants to move according to what Ms. Kimura suggested, they could discuss it, and the Committee can decide.

Chair Atkins asked if everyone on the Branding Standing Committee had enough time to review the budget in the meeting packet. Chair Atkins said he had not yet had a chance to go through it, but he is happy to listen to everyone's comments and reviews.

Mr. Ka'anā'anā spoke to Ms. Kimura's comment. He said he and the staff recommended a budget of \$17 million for the U.S. market, \$6.5 million for the Japanese market, \$800,000 for the Canadian market, \$950,000 for Oceania, \$630,000 for Korea, and \$120,000 for China, totaling \$25.99 million. Mr. Ching said he asked about the Chinese market after his 2x2 discussion and some of the China talks. Mr. Ka'anā'anā said the China market has been reduced to \$120,000, which is \$10,000 a month. Mr. Ka'anā'anā said they redirected China's original allocation in FY2023 into Oceania and some into Korea. Mr. Ching asked if any changes needed to be highlighted that were from the original to now, based on changes. Mr.

Ka'anā'anā said his suggestions from the 2x2 discussions were increasing the monthly music series if there was extra money, or the market support line item from Hawaiian Culture, etc. Many of the direct recommendations were to move out of the China market. Ms. Kimura had suggested taking \$500,000 each from U.S. and Japan and putting it into Opportunity Funds for Japan or China.

Mr. Ching said he would like to see what the other members suggest, see the updated version, and then come back together again to discuss.

Chair Atkins asked if they could see specifically what members were concerned about or if it was combined in the contract. Mr. Ka'anā'anā said they took everything and synergized everything, then took the recommendations to staff. Mr. Ka'anā'anā said if the members want to wait until the final set of Board members has their final 2x2 discussion, the staff can take the final recommendations and incorporate them into a revised draft and send it to the committee before the June meeting, when they would have the staff's final recommendation, then present it at the full Board meeting. Chair Atkins suggested they have another Branding Standing Committee meeting after the last set of 2x2 discussions. Mr. Ka'anā'anā said this is possible, and they could have the next meeting on June 23, 2022, if it suits everyone. Mr. Ka'anā'anā said he will check the timing as they have orientation for the new Board members coming in. Ms. Kimura said she is happy with the suggestion. Mr. Rafter left earlier, so he was not on the call to comment. Chair Atkins also supported this and left it to Mr. Ka'anā'anā and Ms. Hagihara to sort out.

10. Presentation, Discussion, and/or Action on the HTA Branding Plan for the Economic Development Administration FY21 American Rescue Plan Act – Travel, Tourism, and Outdoor Recreation Grant

Mr. Regan said they have an EDA grant that HTA was assigned by the governor. This is to administer a little over \$14 million. HTA is working with the EDA to ensure the paperwork is filed to move forward. The final piece is the grant administration plan that was put before the different committees and the Ho'okahua Hawai'i Standing Committee in June. Within the grant, there are different projects being discussed. For branding, there is a \$4 million allocation out of that \$14 million that is targeted to support branding. In the EDA notice of funding opportunity, there are clear uses of the monies in terms of what EDA says the funds could be used to support. The first one is to utilize the \$4 million for state tourism marketing and promotion campaigns.

Mr. Regan asked if Mr. Ka'anā'anā could elaborate more. Mr. Ka'anā'anā said that based on the Notice of Funding Opportunities (NOFO), marketing and branding activities were aligned project HTA would propose under the EDA noncompetitive grant award. He requested the Branding Standing Committee's support for the portion of the EDA grant. The total funding awarded is \$14 million, and HTA's portion is \$5.5 million. The Branding Campaign proposed \$4 million based on Branding campaigns that will go through. The funds are available through December 31, 2026, and work needs to be completed by May 31, 2027.

Mr. Ka'anā'anā spoke about the five initially proposed categories for EDA. It falls under the marketing campaigns promoting state and regional assets HTA will be focusing on for those campaigns. HTA is allocating, in their plan, \$3.25 million for a brand marketing campaign targeted at the Mindful Hawai'i Traveler, consistent with the Mālama Hawai'i & Kuleana campaign messages. HTA will use existing assets and funds to support paid media opportunities with minimal project implementation and administration costs. He showed a proposed timeline, but some dates would need to change. HTA can evaluate the timing with the Board before doing anything. As part of the \$4 million, they are proposing that \$750,000 be used to develop a tactical cooperative marketing campaign. The program will partner with wholesalers and escorted tour operators. HTA will look at the operators and evaluate them based on their opportunity to reach an audience, direct consumer, and key source markets. Messaging will be consistent with the Mālama Hawai'i campaign. Selected wholesale partners must match contributions with a 100% cash match.

Mr. Ka'anā'anā spoke about the slide for the wholesaler tactical co-operative marketing campaign work plan and mentioned that the timeline would shift depending on discussions with the Board.

He spoke about the expected outputs/outcomes that the EDA uses: increased visitor expenditures, number of visitor arrivals, number of room nights, and number of impressions across those channels. He said they are metrics and KPIs aligned with the NOFO from the EDA, so they differ somewhat from the HTA KPIs in some ways. HTA is required to follow procurement, which is 103D-102.

Ms. Kimura asked if the wholesaler cooperation must be a domestic wholesaler or if it could be Japan. Mr. Ka'anā'anā said his understanding and intention was to set it for the U.S. market. Mr. Ka'anā'anā said that is where they need the most focus.

Mr. Ching asked for clarification on the \$5 million available, and the reason for the \$4 million request. He asked about the timeline for spend and for an explanation of why they are

frontloading to 2022 and 2023. Mr. Ka'anā'anā clarified that they need to submit a grant administration plan to the EDA to start using the funds, but they do have flexibility with the timing for the various programs within the entire grant administration plan. They have to go to EDA for approval first.

Mr. Ka'anā'anā spoke to Mr. Ching's question about the timing and said the funds are available through December 31, 2026. He said if the Board wants to hold off on a branding or cooperation campaign, they need to submit the grant administration plan to get the approval of the EDA, so other portions of the grant can begin. He recommended to the Branding Standing Committee that they wait. Mr. Ching asked what happened to the remaining \$1.5 million. Mr. Ka'anā'anā said it is for the other programs for the Ho'okahua committee, so they will vet that portion, including the walking trail and the collaboratives that Ms. Anderson posed.

Mr. Ka'anā'anā said his ask of the committee is a recommendation to the full Board to approve the \$4 million of the EDA grant administration plan, the portion specifically related to branding. They will do the same for Ho'okahua for other pieces.

There were no comments or questions. Chair Atkins asked for a motion to recommend to the full Board approval of the EDA Grant for \$4 million. Mr. Ching made a motion. Mr. Rafter seconded.

Mr. Casson-Fisher did the roll call, and the motion passed unanimously.

11. Adjournment

Chair Atkins asked for a motion to adjourn. Ms. Kimura made a motion to adjourn. Mr. Ching seconded. The motion passed unanimously.

Ms. Casson-Fisher concluded the meeting at 5:15 p.m.

Respectfully submitted,



Sheillane Reyes
Recorder

3

Presentation by Mr. Chris Kam on
Results of the Marketing Effectiveness Survey



Hawai'i Tourism Authority
Marketing Effectiveness Study
Highlights

July – December 2021

Wave 5 Report

HTA Branding Standing Committee

Prepared by



Methodology

Target Audience/Markets

-
- Random sample of U.S., Canada, Japan, and Korea residents
- **U.S.: 1,202 sample**
 - Typically travel for leisure by air 500 miles or more in past 12 months with household income of \$75,000 or higher
 - U.S. West includes states of Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming
 - U.S. East includes all continental states not in U.S. West region
- **Canada: 601 sample**
 - Typically travel for leisure by air 500 miles or more in past 12 months with household income of \$75,000 CAD or higher.
- **Japan: 600 sample**
 - Typically travel internationally for leisure in past 24 months with household income of 3,999,000 Yen or higher.
- **Korea: 600 sample**
 - Typically travel internationally for leisure in past 24 months with household income of 30,000,000 won or higher.

Timeframe

- **Wave 5: Data collection January – March 2022 for marketing activities between July – December 2021**

Survey Methodology

- Online surveys taken by Prodege panelists
- Paid media consumption measured through recognition of ads via TV/video, untagged digital, and social media
- Owned media recognition of Hawai'i channels, including website, YouTube, Facebook, or Instagram
- Earned media recall of articles and stories

Key Takeaways

1

In the wake of the pandemic, vacationers seek “R&R”, less interested in new learnings, cultures

Compared to pre-pandemic times, vacations first and foremost continue to be about escape, rest and relaxation, but are also cited less often as opportunities to experience other cultures and learn new things. In selecting a leisure destination, travelers now prioritize safety/security, getting away from it all, and a sense of relaxation, while unique experiences/scenery and history/culture have become less important.

2

Fueled in part by pent-up travel demand, future travel interest in Hawai‘i exceeds pre-pandemic levels.

Interest in visiting Hawai‘i in the next 12 months has surpassed pre-pandemic levels within each of the Major Market Areas measured.

3

Top destination perceptions of Hawai‘i have shifted, though unique scenery and authentic experiences remain strong.

Compared to pre-pandemic measures, top destination perceptions of Hawai‘i have changed. Within its competitive set, Hawai‘i is now most strongly perceived as a destination with unique scenery, residents and visitors who follow health/safety guidelines, great shopping, minimal crowds, authentic experiences and ease of access to/from/within.

4

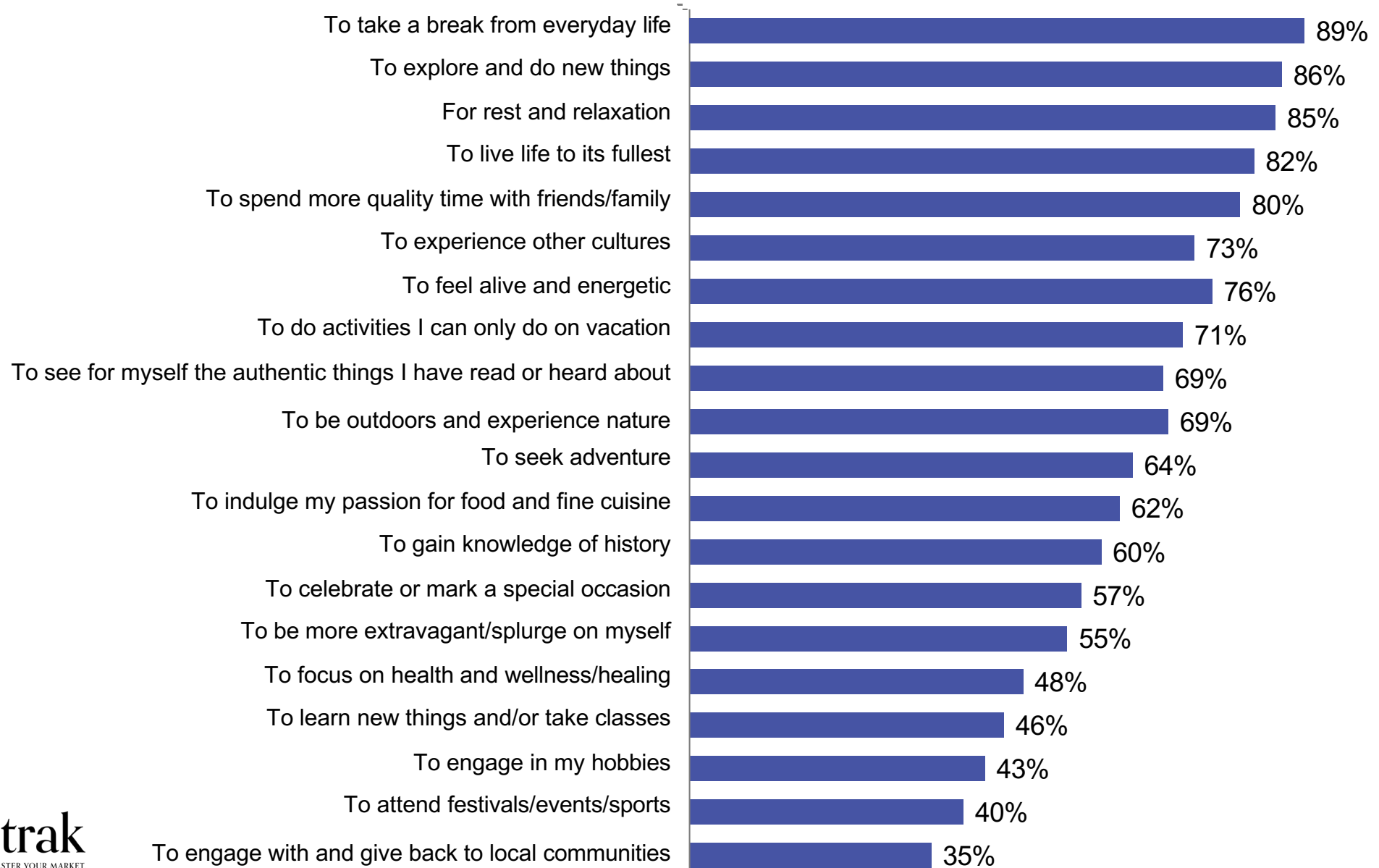
Hawai‘i IMC marketing boosts sustainability, history/culture brand perceptions of the state

Awareness of Hawai‘i’s Integrated Marketing Campaigns (IMC’s) strengthens perceptions of the state as a destination with sustainable practices, history and culture rather than being simply a great getaway, a place of relaxation. Moving forward, IMC efforts should continue to build destination perceptions in these areas to attract a visitor more attuned with the state’s regenerative offerings.

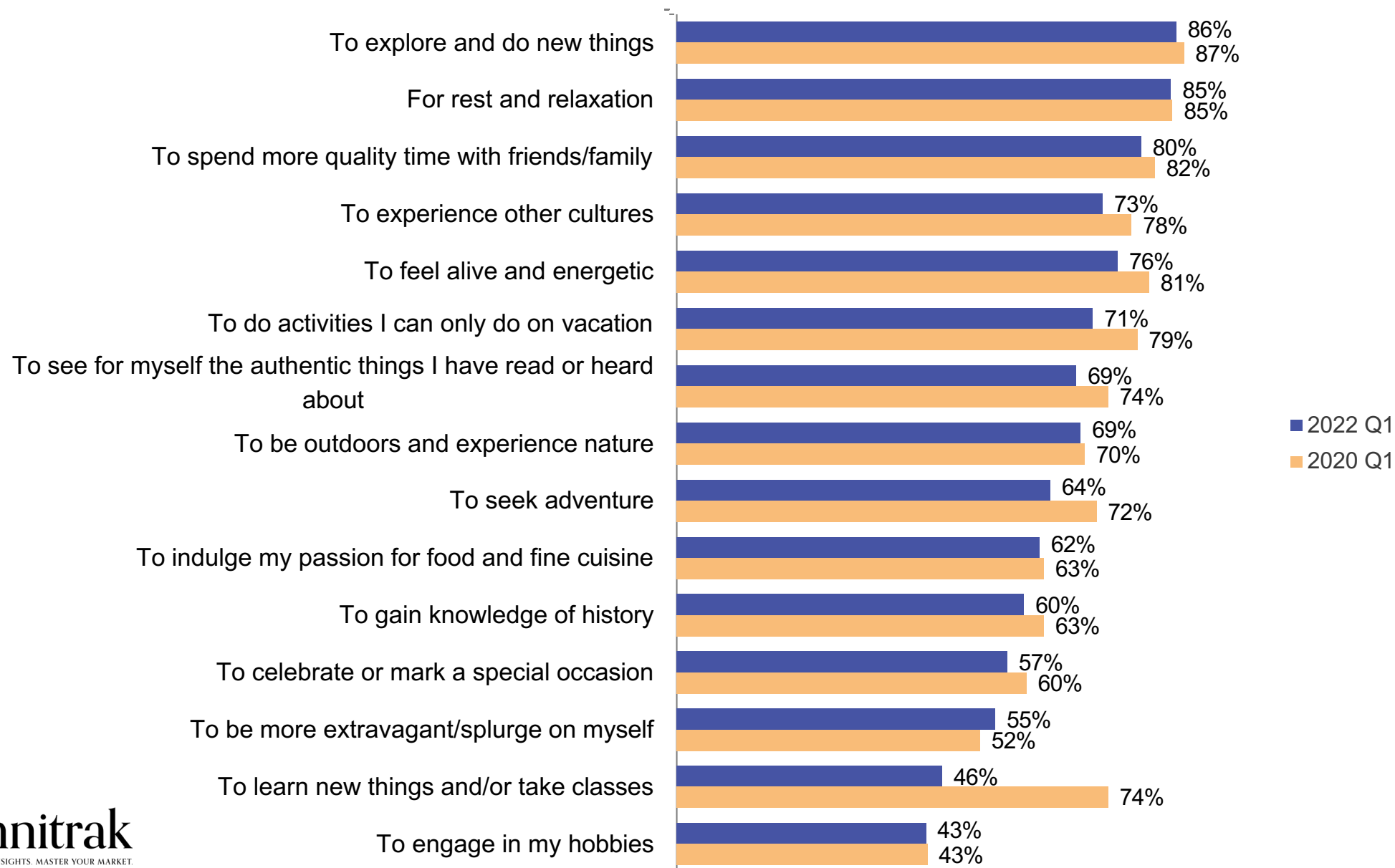
1

Summary of Market – U.S.

Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important (Total US)



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important (Total US)



Top Destination Selection Attributes – U.S. West & US East

US West	2022 Qtr 1	2020 Qtr 1	DIFF
Safe and secure	89%	88%	+1 pt
Great place to get away from day-to-day life	84%	83%	+1 pt
Welcoming/open to people like me	80%	- -	NA
Clean environment	79%	78%	+1 pt
Sense of relaxation, a place to unwind and re-energize	79%	82%	-3 pts
Authentic experiences	78%	83%	-5 pts
Friendly local people	77%	81%	-4 pts
Offers a different experience than other places	77%	81%	-4 pts
Residents and visitors follow health/safety guidelines	76%	- -	NA
Unique scenery unlike anywhere else	76%	82%	- 6 pts
Variety of unique experiences and activities	75%	82%	-7 pts
Good value for the money	74%	77%	- 3 pts
Opportunities to discover new activities and experiences	74%	75%	- 1 pt
History and culture are intriguing	72%	78%	- 6 pts
Has consistent/dependable experiences	71%	80%	- 9 pts

US East	2022 Qtr 1	2020 Qtr 1	DIFF
Safe and secure	91%	85%	+6 pts
Great place to get away from day-to-day life	88%	83%	+5 pts
Sense of relaxation, a place to unwind and re-energize	84%	79%	+5 pts
Welcoming/open to people like me	81%	- -	NA
Clean environment	81%	79%	+2 pts
Authentic experiences	80%	81%	-1 pt
Good value for the money	79%	75%	+4 pts
Variety of unique experiences and activities	79%	81%	-2 pts
Offers a different experience than other places	77%	80%	-3 pts
Friendly local people	77%	75%	+2 pts
Unique scenery unlike anywhere else	77%	76%	+1 pt
Has consistent/dependable experiences	76%	74%	+2 pts
Easy to navigate and get around	76%	74%	+ 2 pts
Opportunities to discover new activities and experiences	75%	73%	+2 pts
Residents and visitors follow health/safety guidelines	74%	- -	NA

Destinations Considering/Planning to Visit – U.S. West

Considering for Next Overnight Vacation

U.S. West		2020 Q1	2022 Q1
1	Hawai'i	55%	53%
2	Mexico	28%	31%
3	Italy	27%	27%
4	Caribbean	30%	27%
5	Alaska	--	26%
6	United Kingdom	27%	22%
7	France	26%	20%
8	Australia	27%	19%
9	Other Europe	17%	18%
10	Central/South America	16%	16%
11	Switzerland	19%	13%
12	Southeast Asia	15%	13%
13	Germany	19%	12%
	Other	--	13%
	Not Considering	--	5%

Planning to Visit in Next 12 Months

U.S. West		2020 Q1	2022 Q1
1	Hawai'i	31%	42%
2	Mexico	11%	21%
3	Alaska	13%	17%
4	Caribbean	11%	13%
5	United Kingdom (UK)	11%	12%
6	France	9%	11%
7	Italy	8%	11%
8	Other Europe	5%	10%
9	Switzerland	6%	7%
10	Central/South America	6%	7%
11	Australia	7%	7%
12	Germany	5%	6%
13	Southeast Asia	4%	6%
	Other	--	14%
	Not Considering	--	12%

Destinations Considering/Planning to Visit – U.S. East

Considering for Next Overnight Vacation

U.S. East			
		2020 Q1	2022 Q1
1	Florida	45%	49%
2	Hawai'i	40%	37%
3	California		
4	Caribbean	34%	35%
5	Mexico	21%	23%
6	Italy	25%	22%
7	United Kingdom	25%	21%
8	France	18%	18%
9	Germany	14%	13%
10	Switzerland	14%	13%
11	Central/South America	13%	12%
12	Other Europe	13%	12%
13	Puerto Rico		12%
14	Bermuda	13%	11%
15	Iceland		
16	Southeast Asia	7%	
			5%
	Other	--	12%
		--	

Planning to Visit in Next 12 Months

U.S. East			
		2020 Q1	2022 Q1
1	Florida	29%	42%
2	California	15%	24%
3	Hawai'i	15%	23%
4	Caribbean	15%	19%
5	Mexico	8%	14%
6	France	7%	10%
7	United Kingdom (UK)	10%	10%
8	Italy	10%	10%
9	Other Europe	5%	8%
10	Germany	4%	7%
11	Puerto Rico	6%	7%
12	Central/South America	4%	6%
13	Switzerland	5%	6%
14	Bermuda	4%	5%
15	Southeast Asia	4%	3%
16	Iceland	4%	3%
17	Cuba	1%	2%
	Other		13%
	Not Considering	--	9%

Hawai'i's Top Destination Attributes vs Competitor Destinations – U.S. West

Hawai'i's Top 10 Destination Attributes vs Competitor Destinations

	Hawai'i	Europe	Caribbean	Southeast Asia	Mexico	Australia	Alaska	Central America
1 Residents/visitors follow health/safety guidelines	75%	20%	54%	16%	34%	23%	23%	15%
2 Easy to get there	72%	38%	54%	30%	41%	35%	39%	27%
3 Great shopping	70%	48%	46%	14%	22%	17%	16%	11%
4 Friendly local people	67%	45%	35%	22%	25%	37%	39%	16%
5 Quality culinary and dining experiences	67%	26%	33%	15%	25%	26%	25%	11%
6 Romantic	65%	34%	18%	11%	11%	41%	49%	10%
7 Authentic experiences	64%	42%	39%	30%	37%	45%	42%	24%
8 Unique scenery	62%	44%	47%	43%	32%	49%	57%	33%
9 Easy to navigate and get around	61%	29%	24%	11%	9%	38%	50%	9%
10 Minimal crowds/not busy	59%	57%	48%	53%	44%	51%	52%	42%

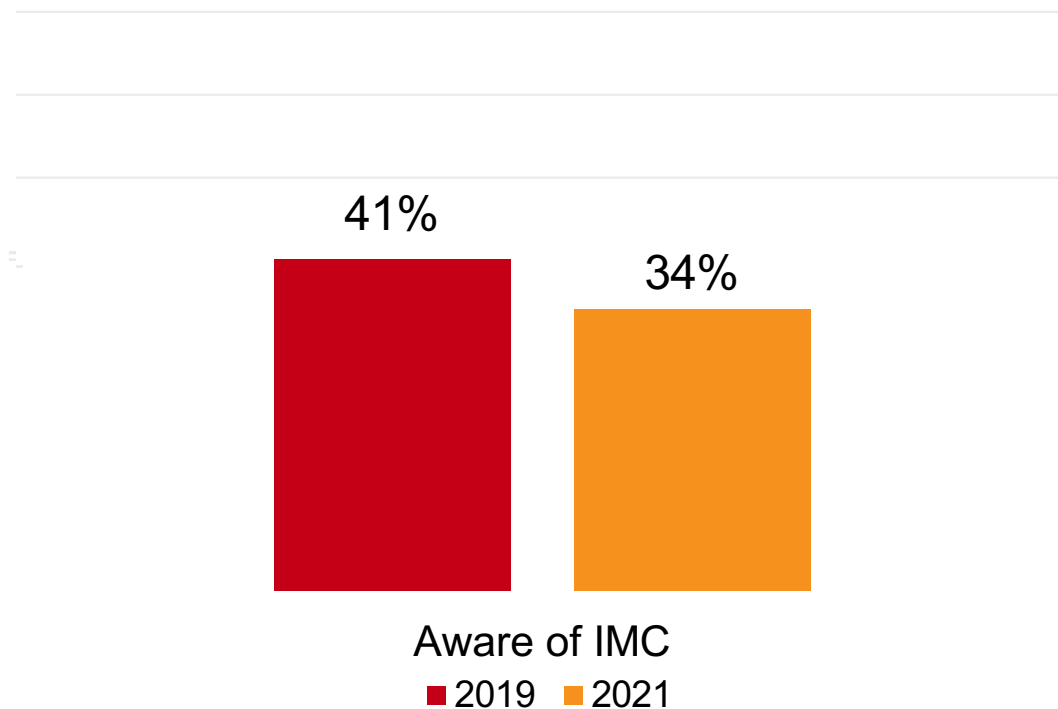
Hawai'i's Top Destination Attributes vs Competitor Destinations – U.S. East

Hawai'i's Top 10 Destination Attributes vs Competitor Destinations

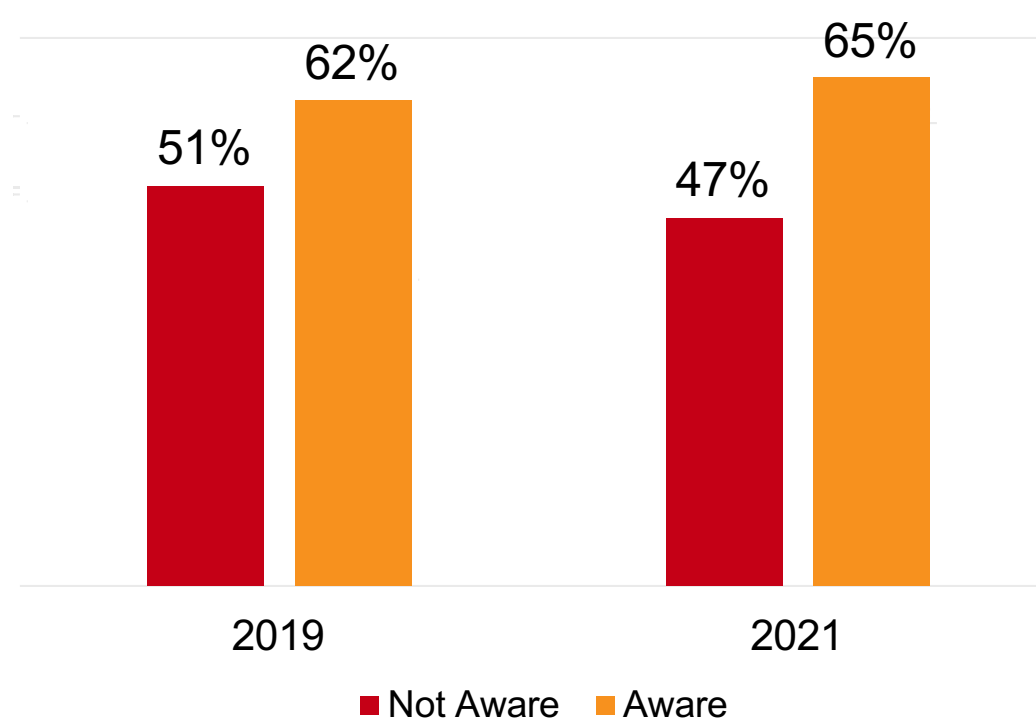
	Hawai'i	Europe	Caribbean	Mexico	Central America	Florida	Puerto Rico	California	South America
1 Unique scenery	66%	45%	45%	36%	34%	22%	29%	28%	36%
2 Residents and visitors follow health/safety guidelines	61%	21%	53%	32%	16%	42%	24%	30%	13%
3 Easy to get there	61%	36%	51%	34%	24%	40%	29%	31%	25%
4 Great shopping	60%	43%	47%	19%	10%	18%	18%	20%	12%
5 Easy to navigate and get around	53%	24%	25%	11%	11%	29%	11%	29%	10%
6 Has consistent/dependable experiences	53%	52%	45%	41%	35%	40%	34%	39%	37%
7 Family-friendly/activities for children	53%	37%	45%	46%	41%	16%	40%	14%	42%
8 Minimal crowds/not busy	52%	52%	45%	40%	38%	34%	34%	37%	39%
9 Authentic experiences	52%	34%	41%	30%	20%	50%	27%	43%	20%
10 Sense of relaxation, place to unwind and re-energize	49%	51%	41%	41%	33%	25%	32%	24%	38%

US West: Integrated Marketing Campaign (IMC) Awareness & Impact

Awareness

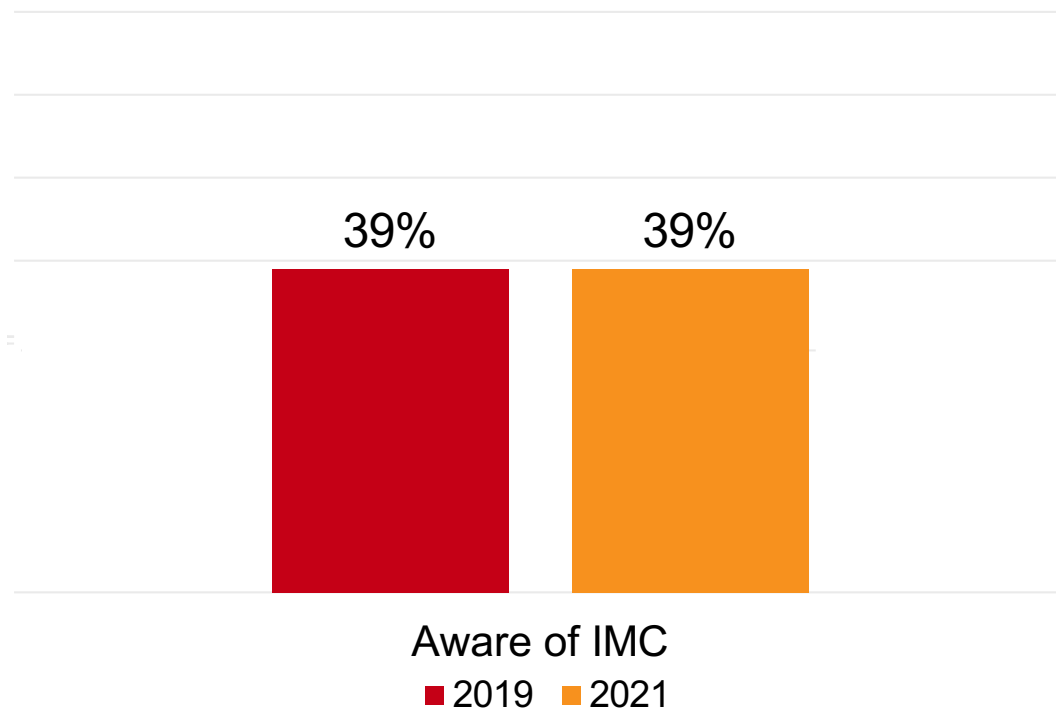


Impact on Travel Intentions (%Considering Hawai'i for Next Vacation)

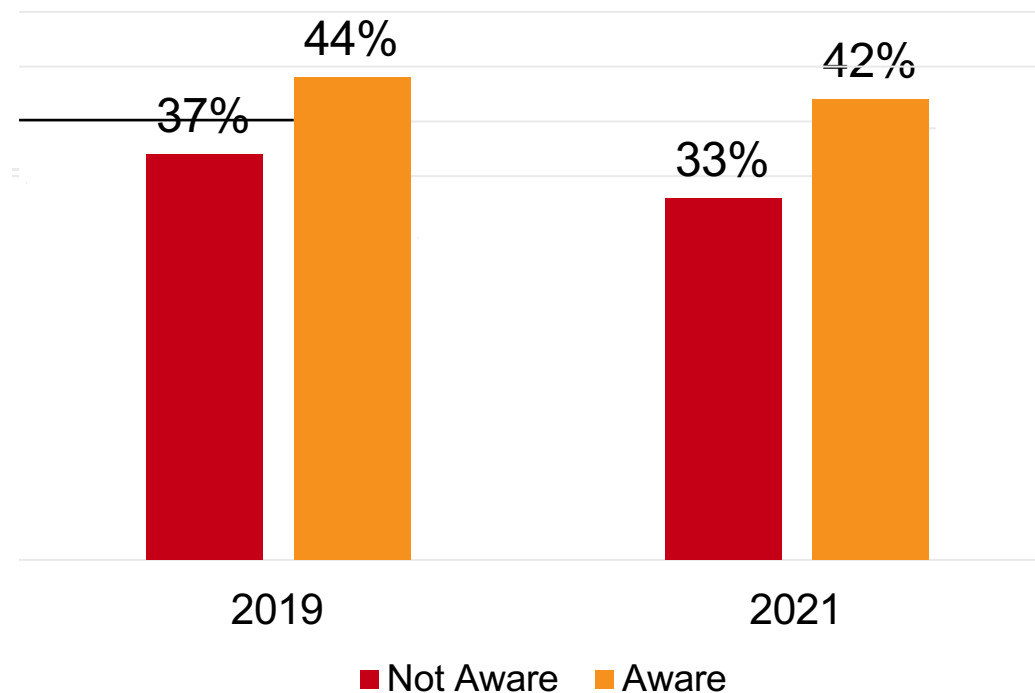


US East: Integrated Marketing Campaign (IMC) Awareness & Impact

Awareness

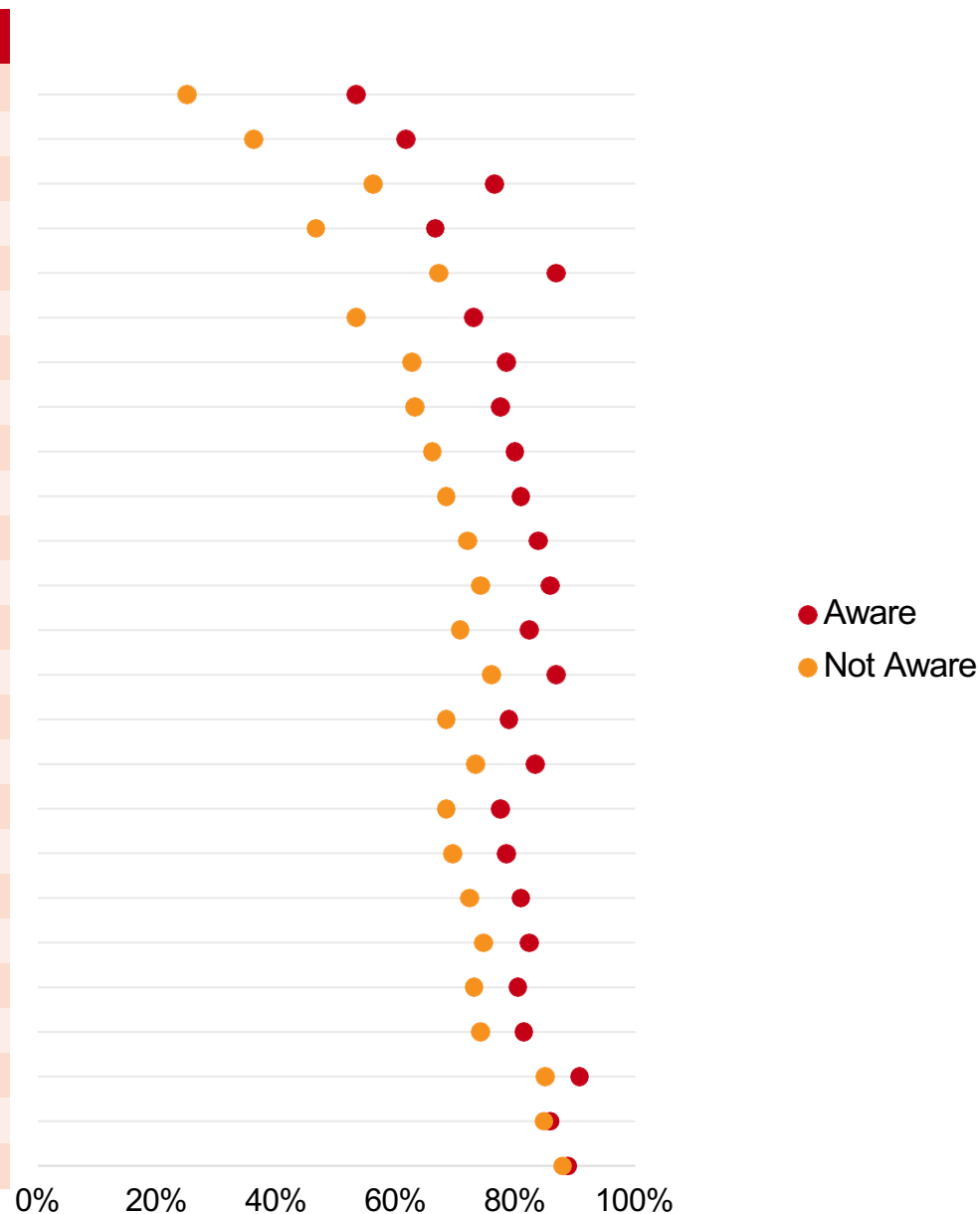


Impact on Travel Intentions (%Considering Hawai'i for Next Vacation)



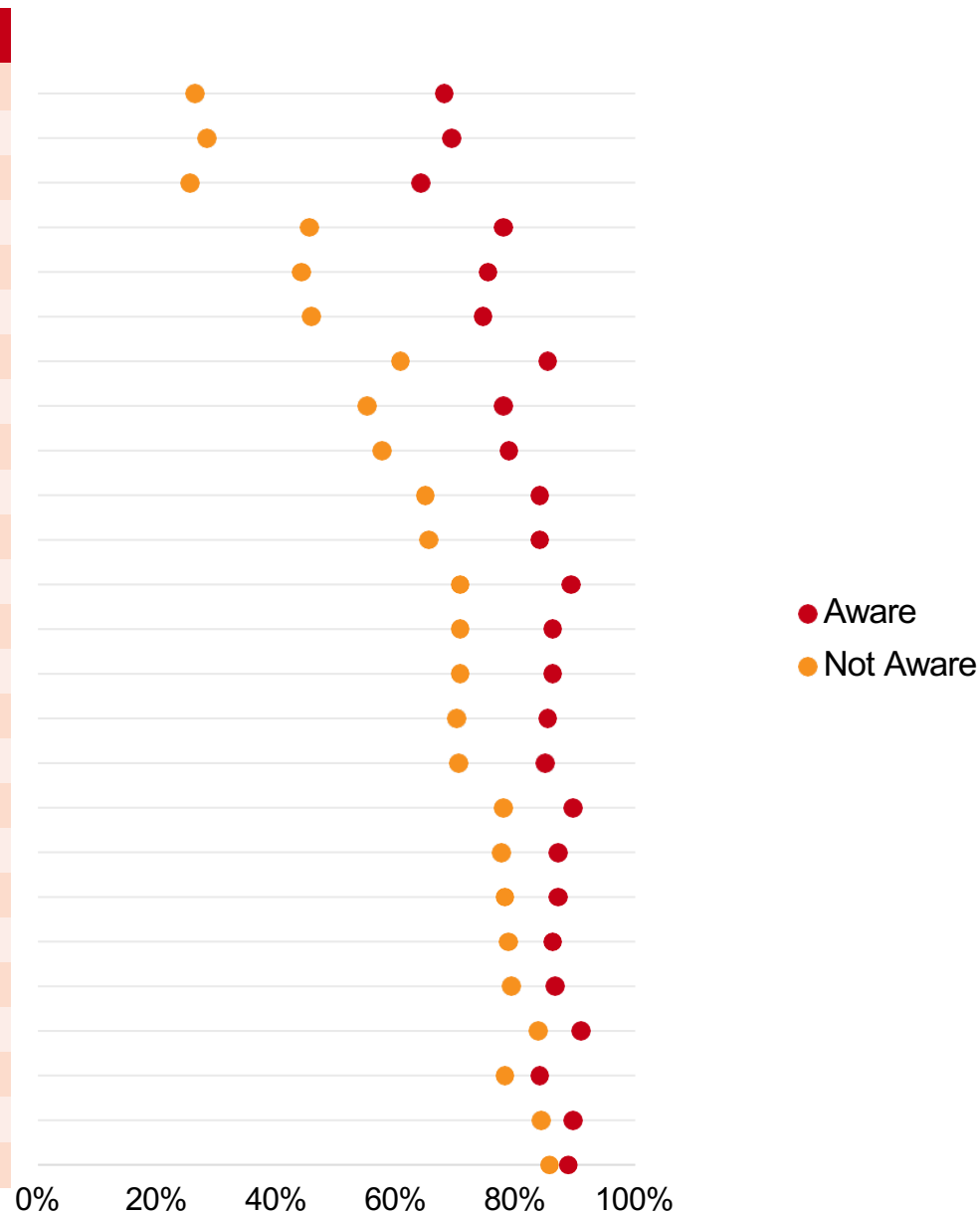
Marketing Impact on Hawai'i's Destination Attributes – U.S. West

Destination Attribute	Difference
Minimal crowds/not busy	+28 pts
Good value for the money	+25 pts
Easy to get there	+20 pts
Great shopping	+20 pts
History and culture are intriguing	+20 pts
Has sustainable practices	+20 pts
Easy to navigate and get around	+16 pts
Residents and visitors follow health/safety guidelines	+14 pts
Historic and cultural offerings	+14 pts
Family-friendly/activities for children	+12 pts
Welcoming/open to people like me	+12 pts
Variety of unique experiences and activities	+12 pts
Offers experiences with native people and their culture	+12 pts
Romantic	+11 pts
Quality culinary and dining experiences	+11 pts
Opportunities to discover new activities and experiences	+10 pts
Offers a different experience than other places	+9 pts
Friendly local people	+9 pts
Authentic experiences	+9 pts
Safe and secure	+8 pts
Clean environment	+7 pts
Has consistent/dependable experiences	+7 pts
Great place to get away from day-to-day life	+6 pts
Unique scenery unlike anywhere else	+1 pts
Sense of relaxation, a place to unwind and re-energize	+1 pts

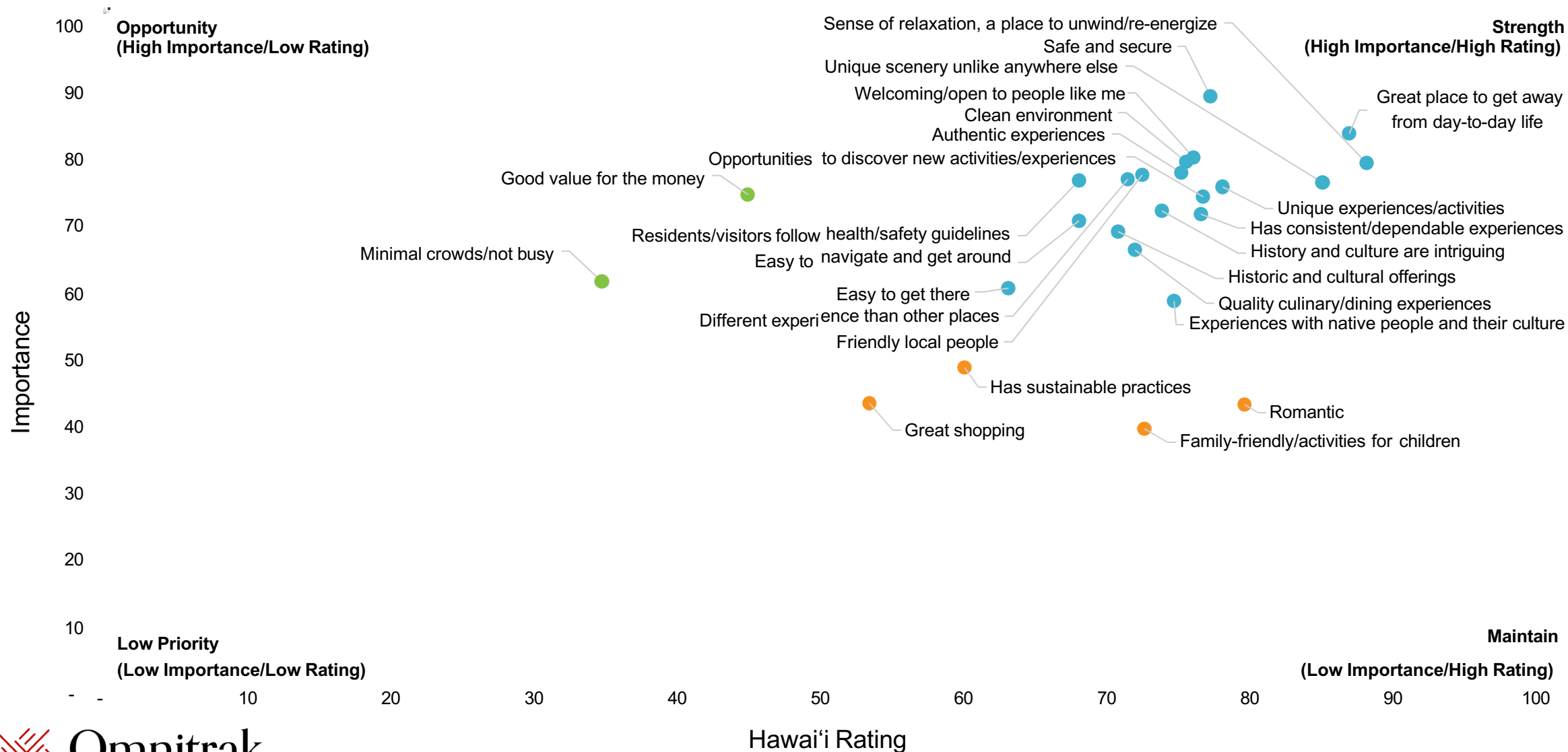


Marketing Impact on Hawai'i's Destination Attributes – U.S. East

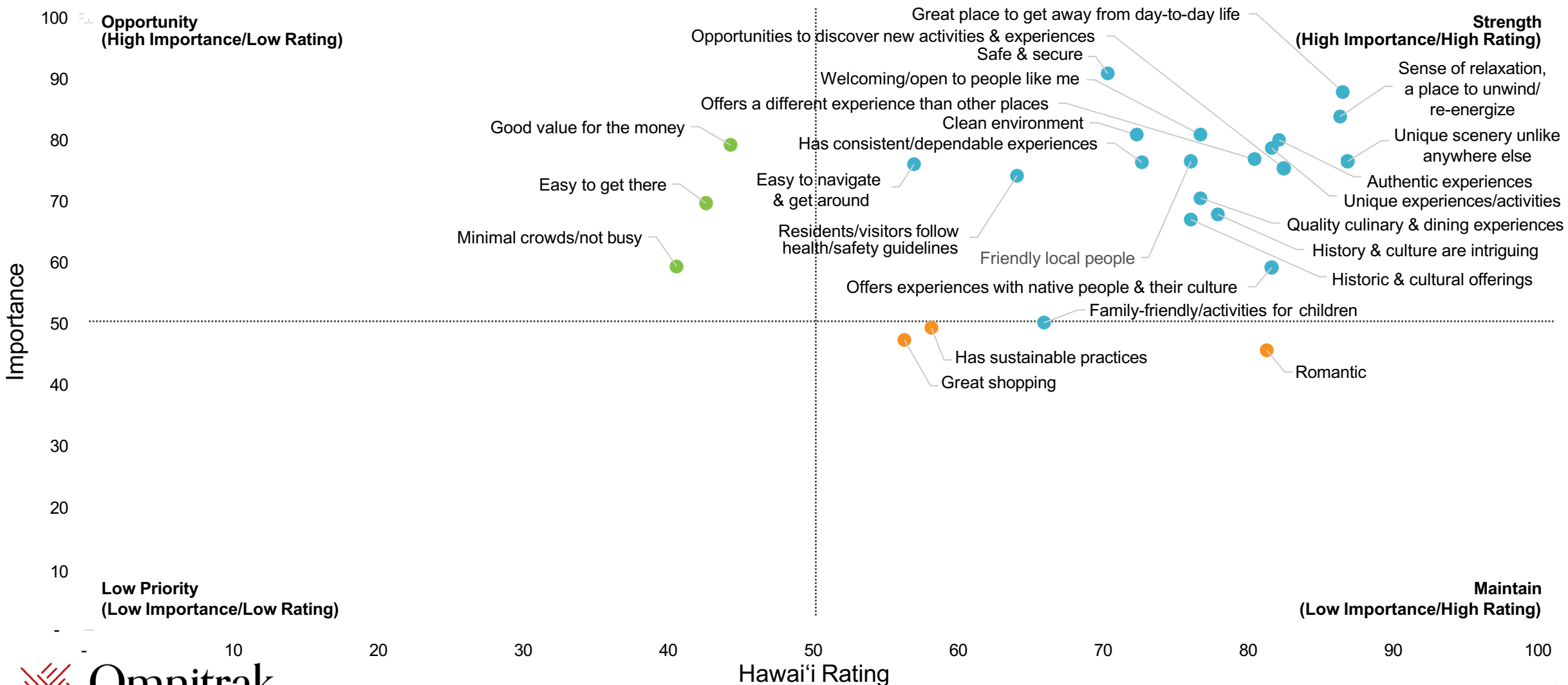
Destination Attribute	Difference
Easy to get there	+42 pts
Good value for the money	+41 pts
Minimal crowds/not busy	+39 pts
Has sustainable practices	+32 pts
Great shopping	+31 pts
Easy to navigate and get around	+29 pts
Safe and secure	+25 pts
Residents and visitors follow health/safety guidelines	+23 pts
Family-friendly/activities for children	+21 pts
Clean environment	+19 pts
Has consistent/dependable experiences	+19 pts
History and culture are intriguing	+19 pts
Quality culinary and dining experiences	+16 pts
Welcoming/open to people like me	+16 pts
Historic and cultural offerings	+15 pts
Friendly local people	+14 pts
Opportunities to discover new activities and experiences	+12 pts
Romantic	+9 pts
Offers experiences with native people and their culture	+9 pts
Variety of unique experiences and activities	+7 pts
Authentic experiences	+7 pts
Great place to get away from day-to-day life	+7 pts
Offers a different experience than other places	+6 pts
Sense of relaxation, a place to unwind and re-energize	+5 pts
Unique scenery unlike anywhere else	+3 pts



Destination Attributes – Importance vs Hawai'i Rating – U.S. West



Destination Attributes – Importance vs Hawai'i Rating – U.S. East



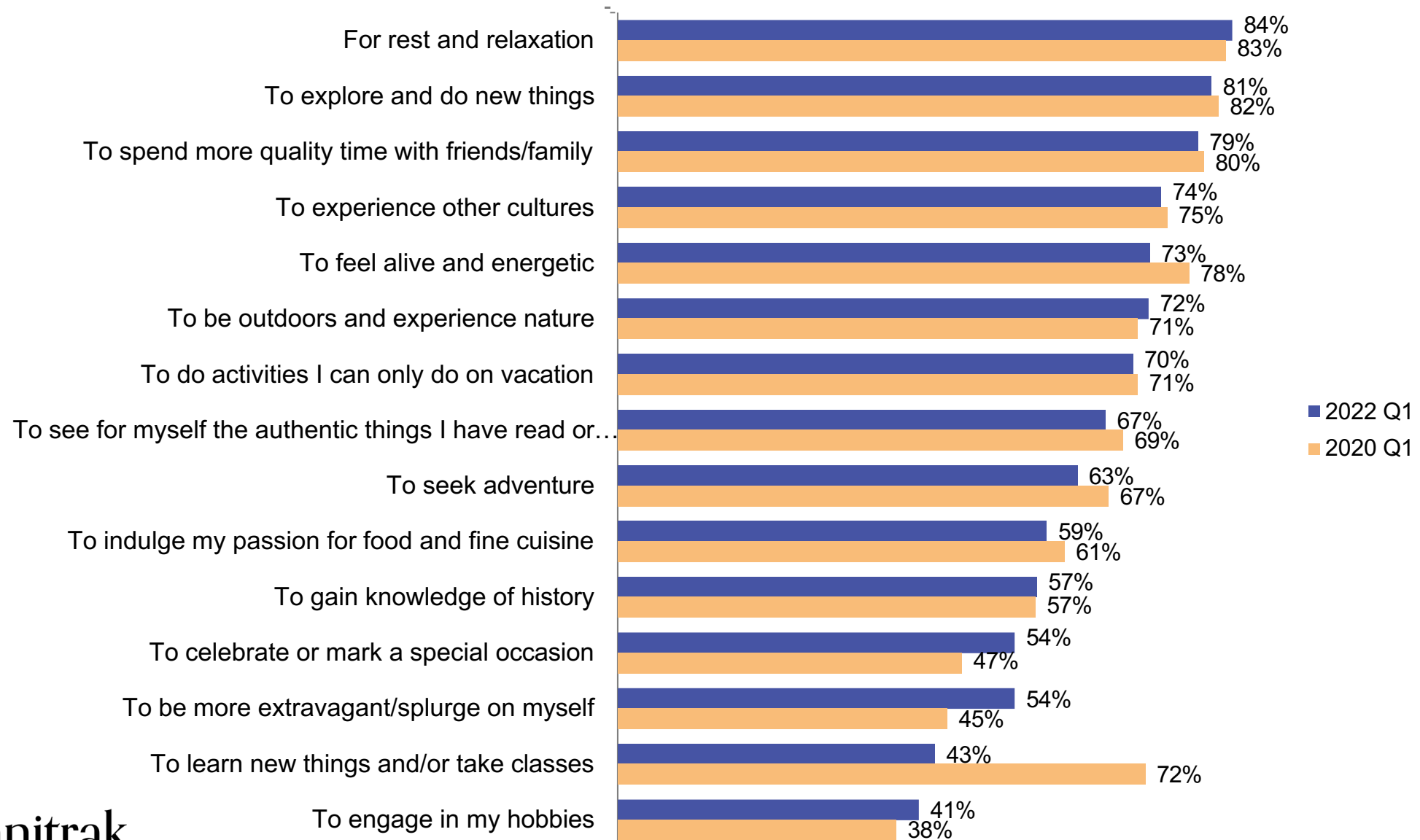
2

Summary of Markets – Canada

Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Top Destination Selection Attributes - Canada

Canada	2022 Qtr 1	2020 Qtr 1	DIFF
Safe and secure	88%	88%	--
Great place to get away from day-to-day life	84%	79%	+ 5 pts
Sense of relaxation, a place to unwind and re-energize	80%	80%	--
Welcoming/open to people like me	80%		NA
Clean environment	79%	75%	+4 pts
Good value for the money	78%	77%	+1 pt
Authentic experiences	76%	77%	-1 pt
Residents and visitors follow health/safety guidelines	76%	--	NA
Friendly local people	74%	78%	-4 pts
Opportunities to discover new activities and experiences	73%	71%	+2 pts
Has consistent/dependable experiences	73%	73%	--
Variety of unique experiences and activities	73%	80%	-7 pts
Offers a different experience than other places	73%	75%	-2 pts
Easy to navigate and get around	73%	70%	+3 pts
Unique scenery unlike anywhere else	70%	76%	-6 pts

Destinations Considering/Planning to Visit – Canada

Considering for Next Overnight Vacation

		Canada	
		2020 Q1	2022 Q1
1	Europe	44%	46%
2	Hawai'i	36%	42%
3	Caribbean	38%	39%
4	California	35%	38%
5	Florida	35%	37%
6	Mexico	32%	36%
7	Las Vegas	30%	31%
8	Arizona	13%	12%
	Other	--	8%
	Not Considering	--	3%

Planning to Visit in Next 12 Months

		Canada	
		2020 Q1	2022 Q1
1	Europe	22%	31%
2	Hawai'i	13%	23%
3	California	15%	22%
4	Florida	15%	20%
5	Mexico	12%	19%
6	Caribbean	17%	18%
7	Las Vegas	12%	16%
8	Arizona	6%	7%
	Other	--	8%
	Not Considering	--	15%

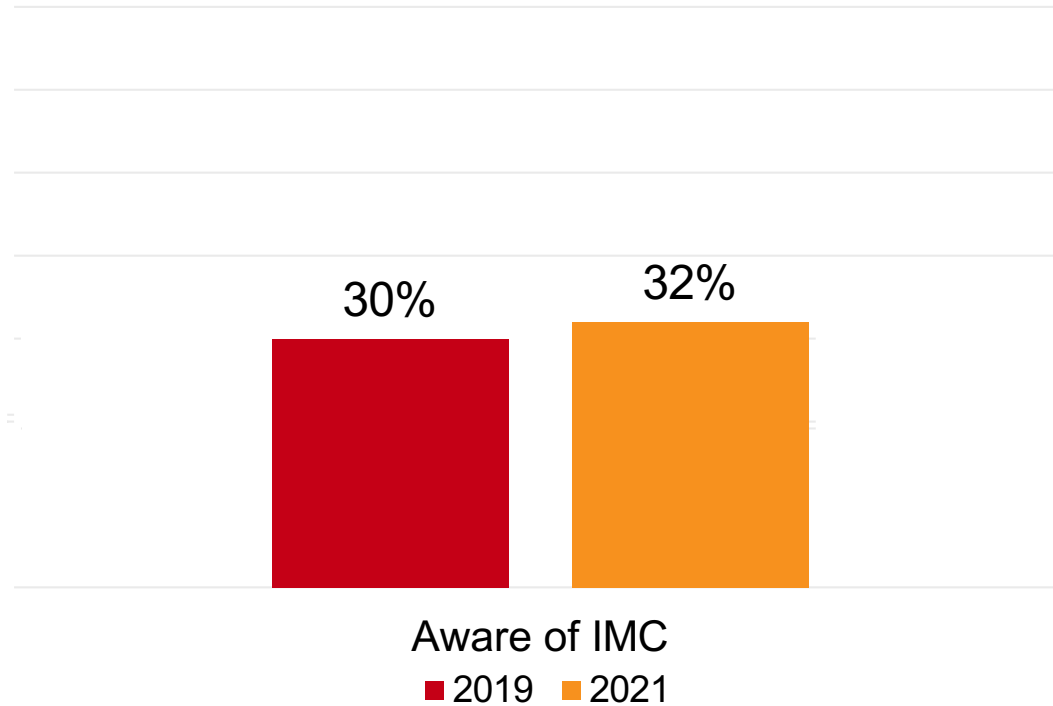
Hawai'i's Top Destination Attributes vs Competitor Destinations

Hawai'i's Top 10 Destination Attributes vs Competitor Destinations

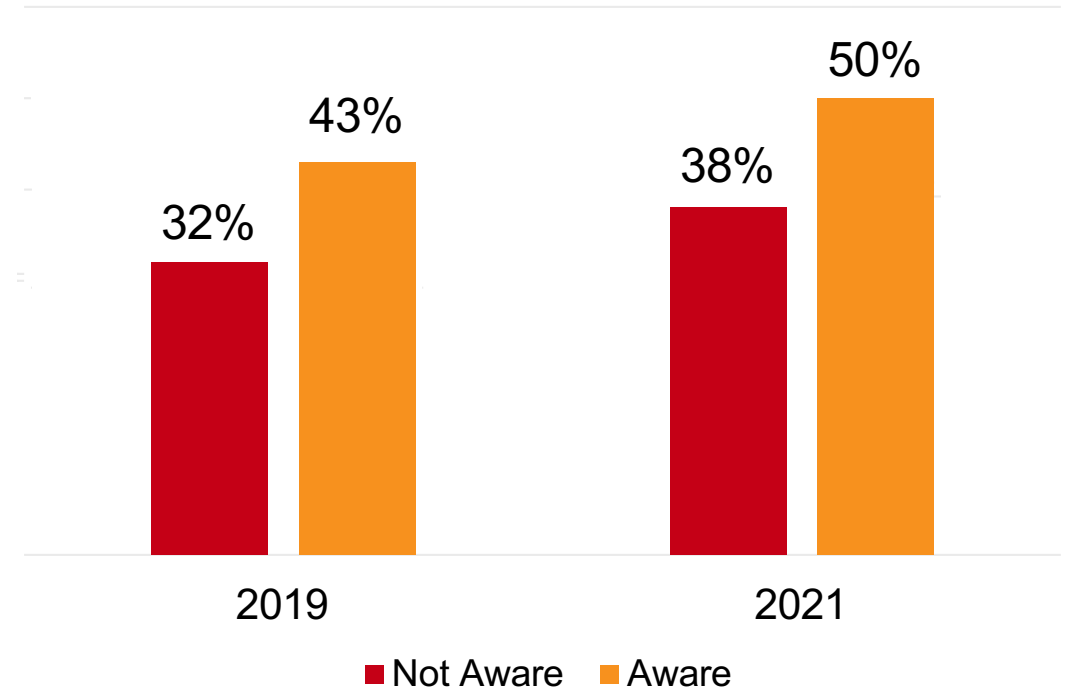
	Hawai'i	California	Florida	Arizona	Mexico	Caribbean	Las Vegas	Europe
1 Unique scenery unlike anywhere else	64%	27%	20%	29%	40%	47%	18%	56%
2 Residents and visitors follow health/safety guidelines	64%	28%	33%	19%	43%	54%	15%	27%
3 Family-friendly/activities for children	57%	12%	14%	11%	52%	47%	9%	42%
4 Easy to get there	56%	32%	35%	24%	43%	50%	32%	43%
5 Great shopping	56%	21%	16%	10%	26%	42%	14%	56%
6 Minimal crowds/not busy	55%	34%	28%	25%	45%	48%	30%	60%
7 Has consistent/dependable experiences	54%	38%	36%	25%	46%	46%	40%	62%
8 Sense of relaxation, a place to unwind and re-energize	53%	25%	25%	21%	44%	43%	24%	62%
9 Authentic experiences	52%	40%	37%	29%	42%	49%	37%	43%
10 Easy to navigate and get around	52%	28%	23%	23%	15%	28%	17%	33%

Canada: Integrated Marketing Campaign (IMC) Awareness & Impact

Awareness

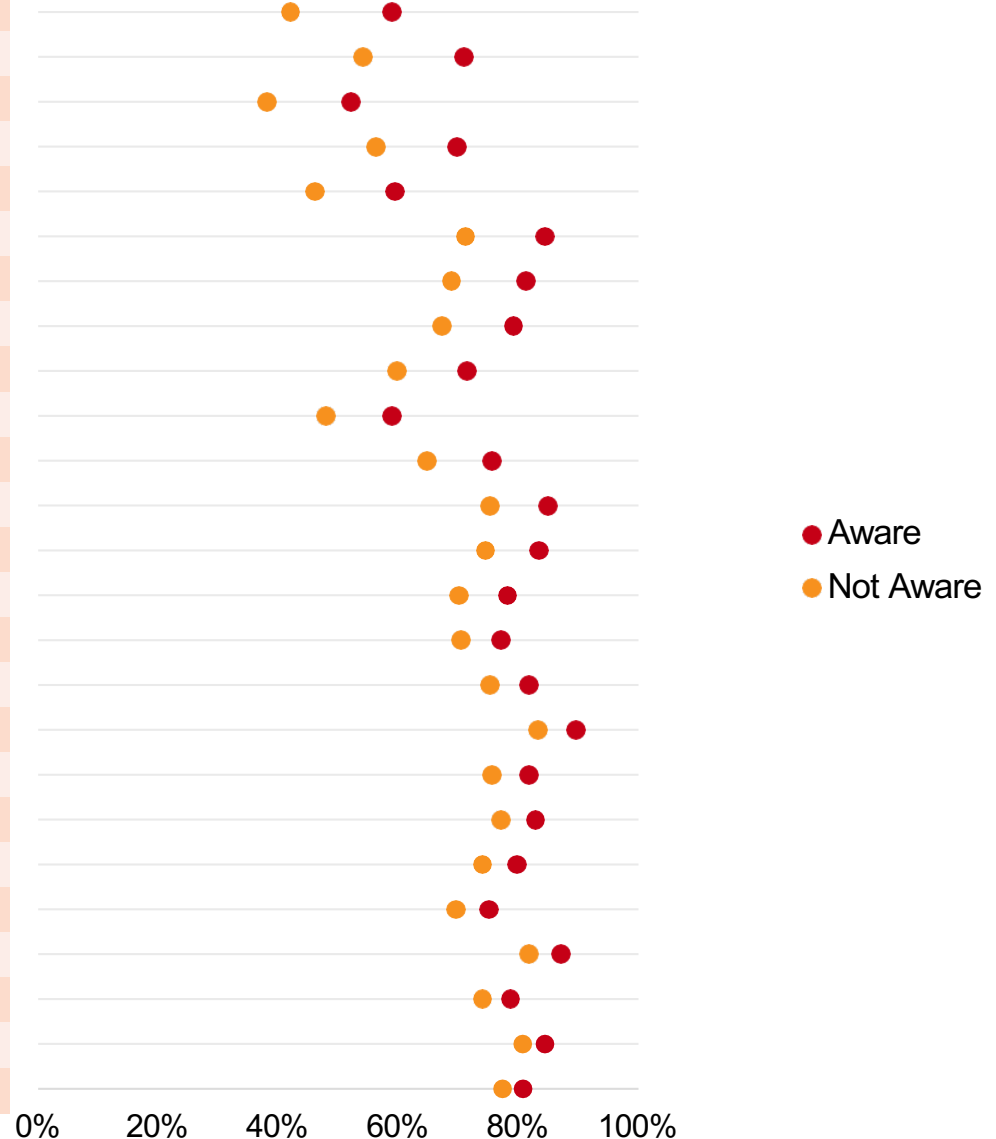


Impact on Travel Intentions (%Considering Hawai'i for Next Vacation)

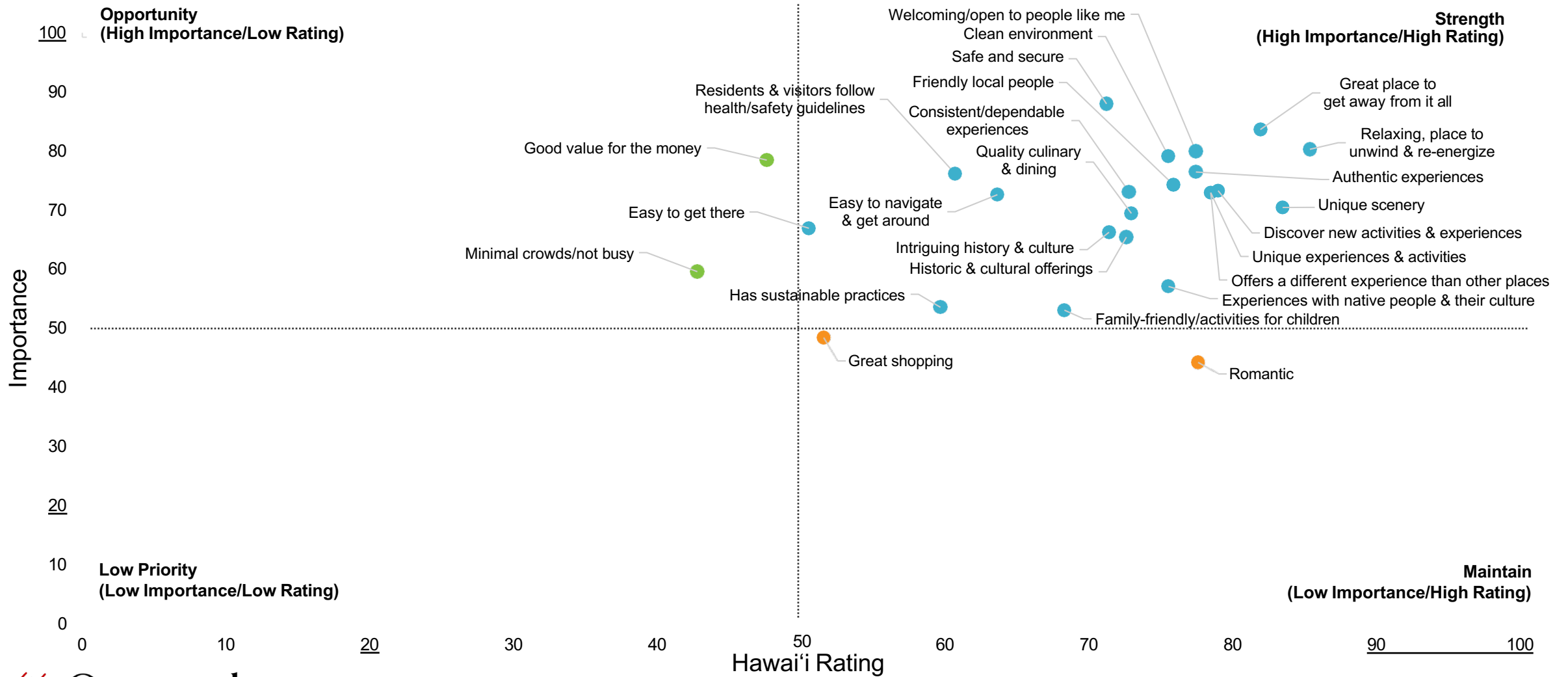


Marketing Impact on Hawai'i's Destination Attributes

Destination Attribute	Difference
Good value for the money	+17 pts
Has sustainable practices	+17 pts
Minimal crowds/not busy	+14 pts
Residents and visitors follow health/safety guidelines	+14 pts
Easy to get there	+13 pts
Clean environment	+13 pts
Quality culinary and dining experiences	+12 pts
Safe and secure	+12 pts
Easy to navigate and get around	+12 pts
Great shopping	+11 pts
Family-friendly/activities for children	+11 pts
Offers a different experience than other places	+10 pts
Welcoming/open to people like me	+9 pts
Has consistent/dependable experiences	+8 pts
Historic and cultural offerings	+7 pts
Authentic experiences	+7 pts
Sense of relaxation, a place to unwind and re-energize	+6 pts
Romantic	+6 pts
Opportunities to discover new activities and experiences	+6 pts
Friendly local people	+6 pts
History and culture are intriguing	+5 pts
Unique scenery unlike anywhere else	+5 pts
Offers experiences with native people and their culture	+5 pts
Great place to get away from day-to-day life	+4 pts
Variety of unique experiences and activities	+3 pts



Destination Attributes – Importance vs Hawai‘i Rating



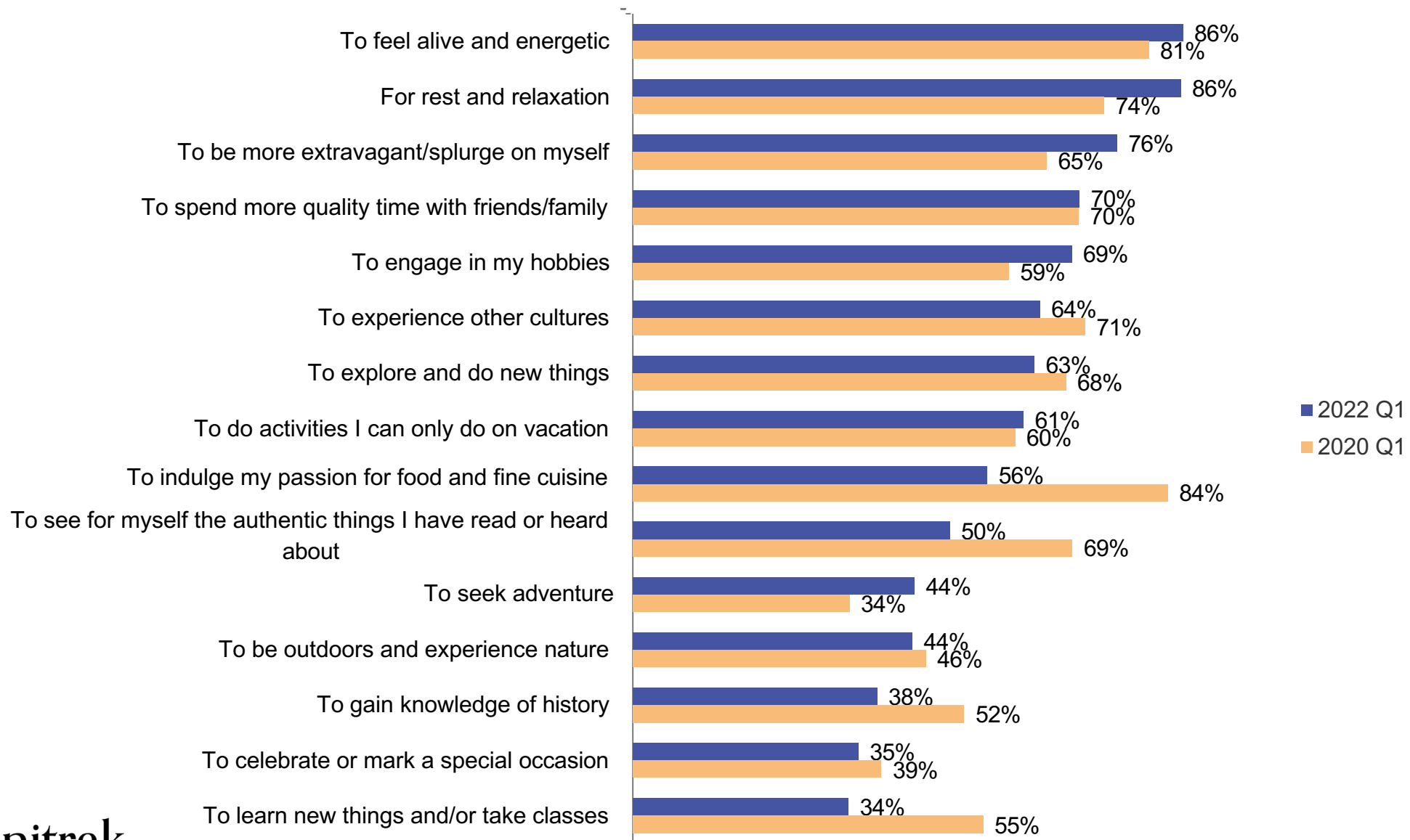
3

Summary of Markets – Japan

Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Top Destination Selection Attributes - Japan

Japan	2022 Qtr 1	2020 Qtr 1	DIFF
Sense of relaxation, a place to unwind and re-energize	84%	79%	+5 pts
Safe and secure	82%	78%	+4 pts
Great place to get away from day-to-day life	81%	81%	--
Unique scenery unlike anywhere else	81%	84%	-3 pts
Good value for the money	79%	62%	+17 pts
Offers a different experience than other places	71%	74%	-3 pts
Clean environment	70%	73%	-3 pts
Residents and visitors follow health/safety guidelines	68%	--	NA
Easy to navigate and get around	65%	72%	-7 pts
Has consistent/dependable experiences	64%	72%	-8 pts
Quality culinary and dining experiences	63%	83%	-20 pts
Authentic experiences	63%	75%	-12 pts
Easy to get there	59%	66%	-7 pts
History and culture are intriguing	59%	71%	-12 pts
Welcoming/open to people like me	58%	--	NA

Destinations Considering/Planning to Visit – Japan

Considering for Next Overnight Vacation

Japan		2020 Q1	2022 Q1
1	Hawai'i	28%	37%
2	Europe	33%	30%
3	Taiwan	28%	30%
4	Okinawa	22%	27%
5	Australia	18%	25%
6	Singapore	16%	21%
7	Thailand	13%	19%
8	Korea	13%	18%
9	Guam/Saipan	14%	14%
10	Hong Kong	7%	11%
11	China	4%	6%
	Other	- -	8%
	Not Considering		12%

Planning to Visit in Next 12 Months

Japan		2020 Q1	2022 Q1
1	Okinawa	41%	22%
2	Hawai'i	12%	18%
3	Europe	15%	13%
4	Taiwan	- -	13%
5	Australia	5%	9%
6	Korea	4%	8%
7	Thailand	- -	7%
8	Guam/Saipan	3%	6%
9	Singapore	- -	6%
10	Hong Kong	- -	3%
11	China	2%	2%
	Other	- -	6%
	Not Considering		41%

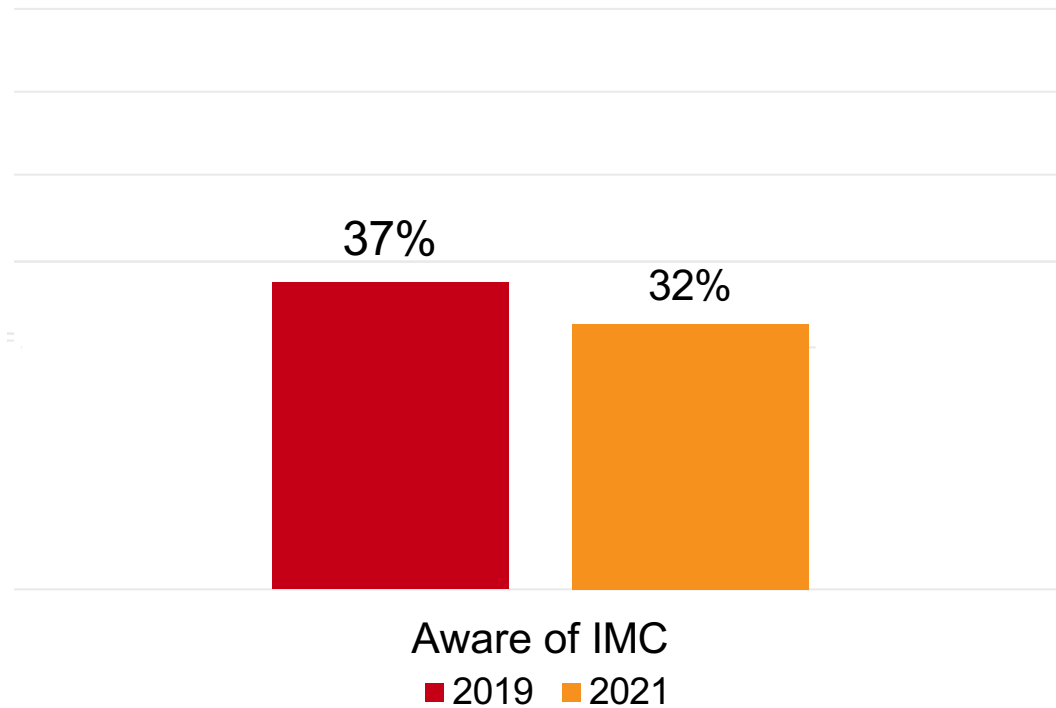
Hawai'i's Top Destination Attributes vs Competitor Destinations

Hawai'i's Top 10 Destination Attributes vs Competitor Destinations

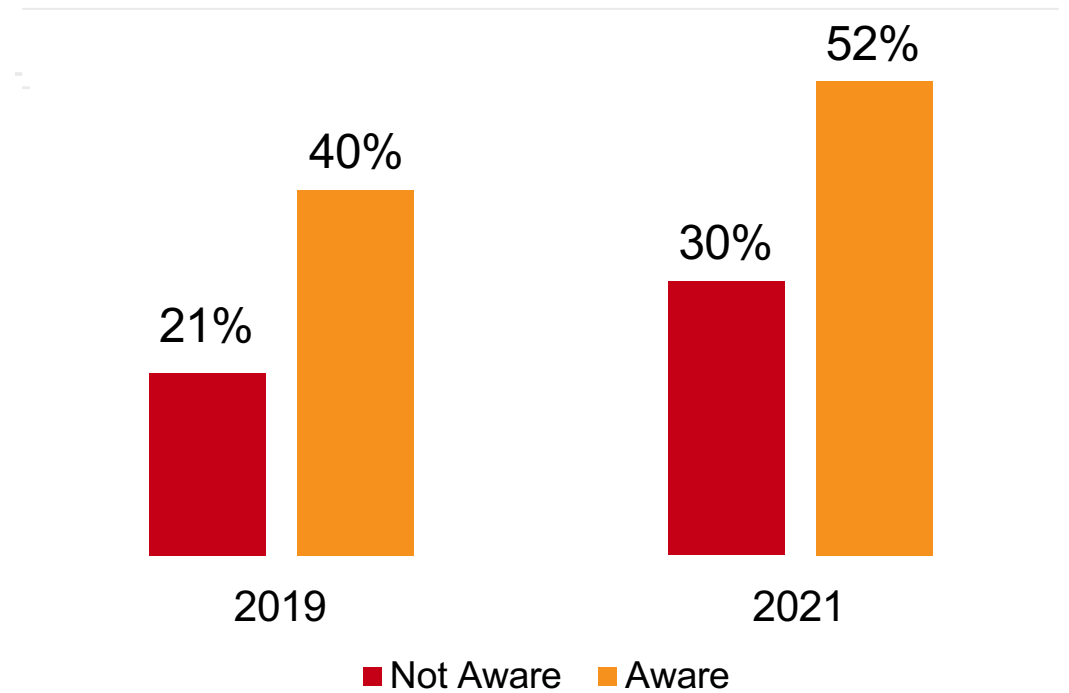
	Hawai'i	Australia	China	Guam	Europe	Korea	Okinawa
1 Easy to get there	67%	51%	14%	40%	57%	16%	37%
2 Residents and visitors follow health/safety guidelines	66%	41%	6%	38%	28%	10%	51%
3 Unique scenery unlike anywhere else	60%	57%	32%	35%	65%	23%	46%
4 Authentic experiences	59%	32%	6%	32%	21%	11%	49%
5 Clean environment	58%	22%	11%	25%	45%	34%	19%
6 Quality culinary and dining experiences	58%	23%	4%	40%	7%	7%	43%
7 Romantic	56%	40%	4%	30%	25%	13%	60%
8 Friendly local people	54%	40%	11%	25%	46%	18%	40%
9 Easy to navigate and get around	54%	44%	3%	25%	38%	11%	55%
10 Has consistent/dependable experiences	53%	46%	11%	28%	27%	13%	31%

Japan: Integrated Marketing Campaign (IMC) Awareness & Impact

Awareness

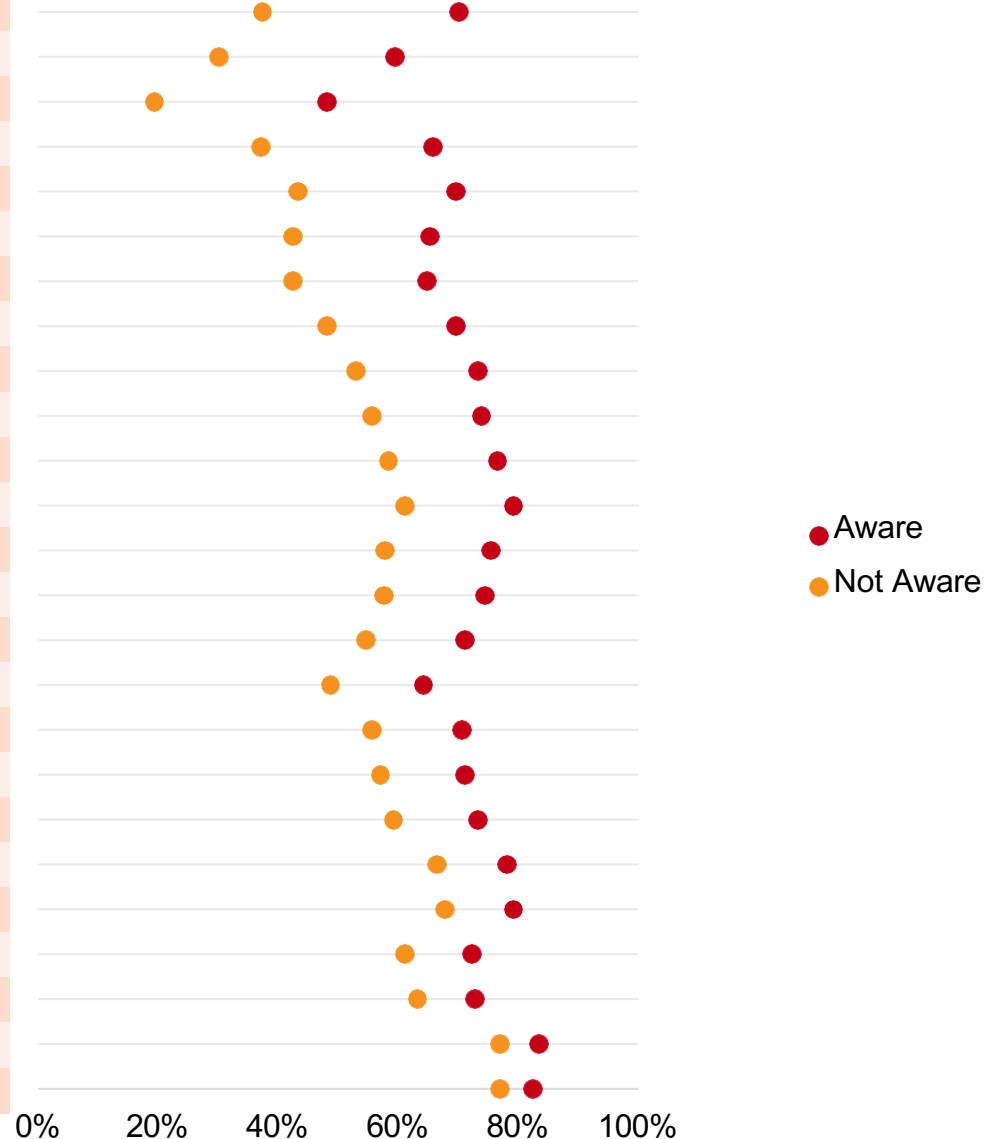


Impact on Travel Intentions
(%Considering Hawai'i for Next Vacation)



Marketing Impact on Hawai'i's Destination Attributes

Destination Attribute	Difference
History and culture are intriguing	+33 pts
Has sustainable practices	+29 pts
Minimal crowds/not busy	+29 pts
Historic and cultural offerings	+29 pts
Offers experiences with native people and their culture	+26 pts
Easy to navigate and get around	+23 pts
Quality culinary and dining experiences	+22 pts
Authentic experiences	+21 pts
Romantic	+20 pts
Clean environment	+18 pts
Offers a different experience than other places	+18 pts
Great shopping	+18 pts
Opportunities to discover new activities and experiences	+18 pts
Friendly local people	+17 pts
Residents and visitors follow health/safety guidelines	+17 pts
Easy to get there	+16 pts
Good value for the money	+15 pts
Variety of unique experiences and activities	+14 pts
Has consistent/dependable experiences	+14 pts
Safe and secure	+12 pts
Unique scenery unlike anywhere else	+11 pts
Family-friendly/activities for children	+11 pts
Welcoming/open to people like me	+10 pts
Great place to get away from day-to-day life	+7 pts
Sense of relaxation, a place to unwind and re-energize	+5 pts



Destination Attributes – Importance vs Hawai‘i Rating



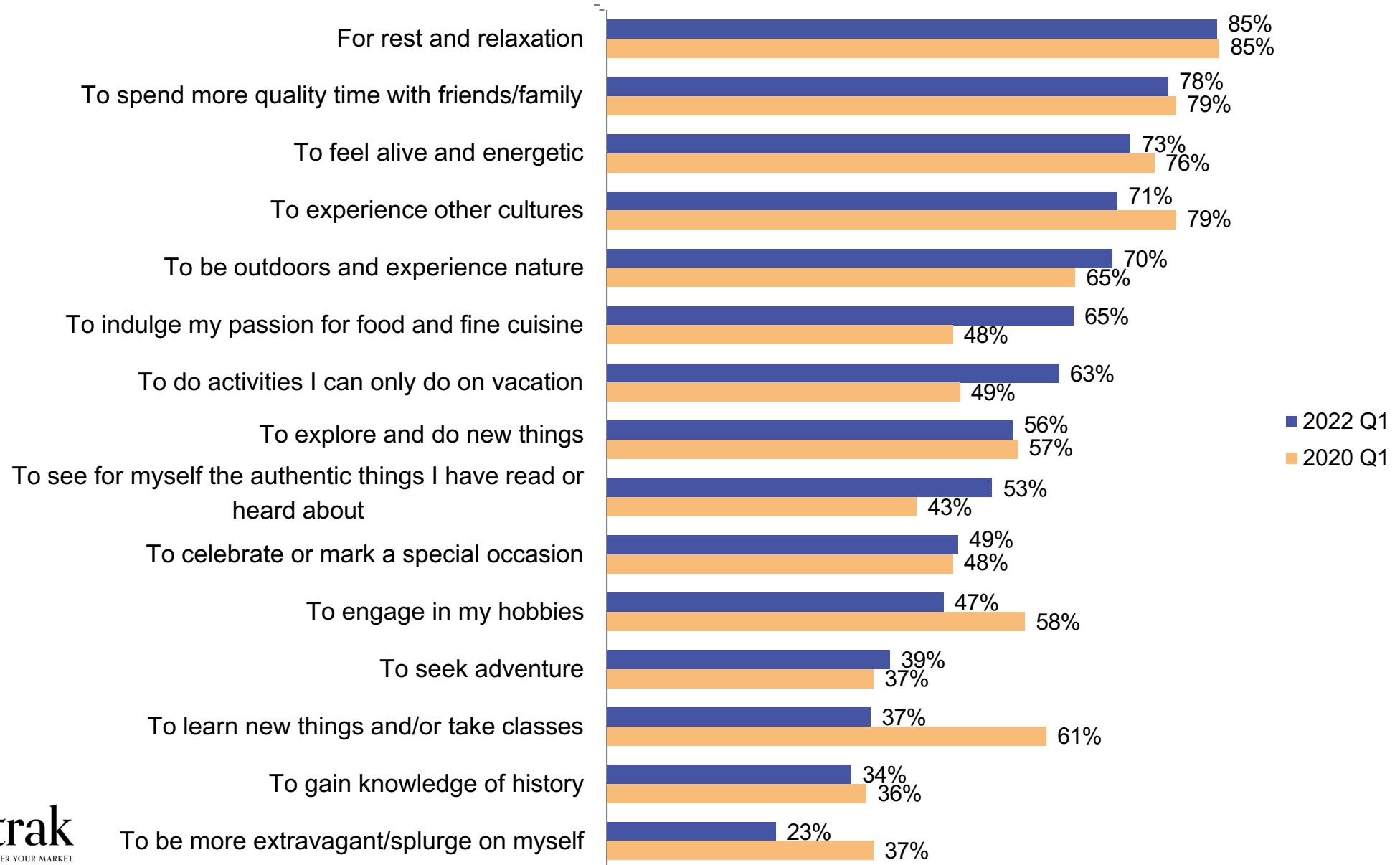
4

Summary of Markets – Korea

Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Destination Selection Attributes - Korea

Korea	2022 Qtr 1	2020 Qtr 1	DIFF
Safe and secure	83%	78%	+5 pts
Sense of relaxation, a place to unwind and re-energize	82%	83%	- 1pt
Great place to get away from day-to-day life	82%	78%	+4 pts
Clean environment	80%	72%	+8 pts
Residents and visitors follow health/safety guidelines	74%	- -	NA
Unique scenery unlike anywhere else	73%	78%	-5 pts
Easy to navigate and get around	72%	70%	+2 pts
Has consistent/dependable experiences	72%	67%	+5 pts
Good value for the money	72%	72%	- -
Quality culinary and dining experiences	70%	62%	+8 pts
Offers a different experience than other places	70%	74%	-4 pts
Opportunities to discover new activities and experiences	67%	60%	+7 pts
Welcoming/open to people like me	64%	- -	NA
Easy to get there	64%	63%	+1 pt
History and culture are intriguing	62%	66%	-4 pts

Destinations Considering/Planning to Visit – Korea

Considering for Next Overnight Vacation

Korea			
1	Southeast Asia	30%	42%
2	Europe	40%	41%
3	Japan	21%	39%
4	Guam/Saipan	34%	39%
5	Hawai'i	39%	34%
6	Australia	30%	34%
7	USA	14%	27%
8	Maldives	27%	22%
	Other	--	2%
	Not Considering	--	4%

Planning to Visit in Next 12 Months

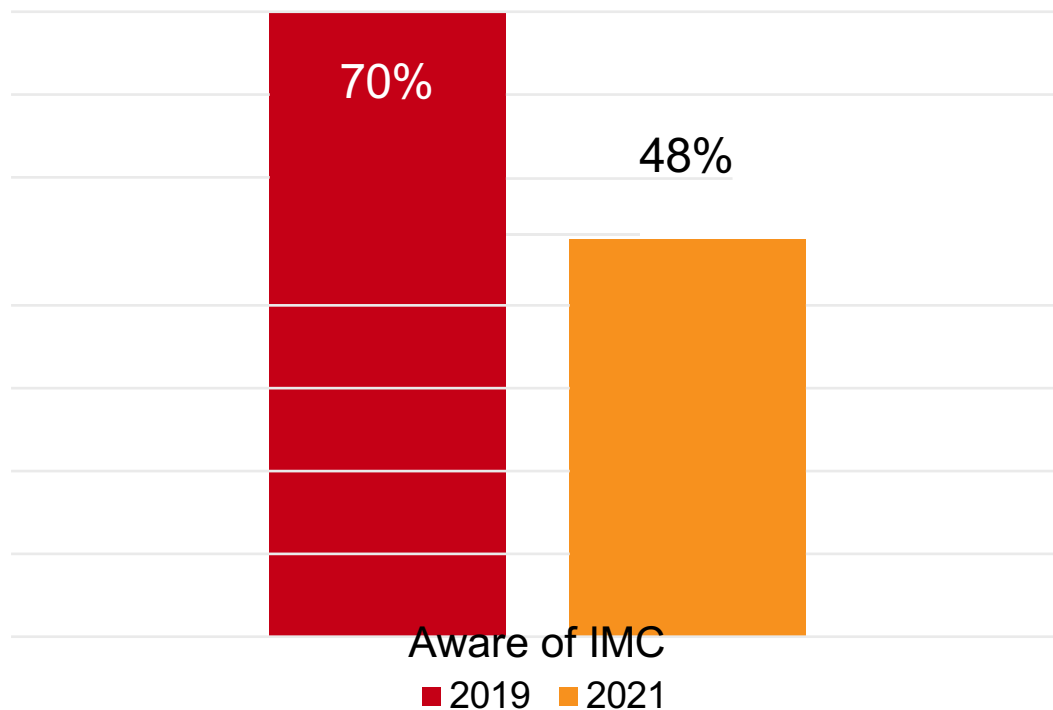
Korea			
		2020 Q1	2022 Q1
1	Southeast Asia	22%	33%
2	Japan	15%	31%
3	Hawai'i	22%	27%
4	Europe	21%	25%
5	Guam/Saipan	--	22%
6	USA	14%	20%
7	Australia	14%	15%
8	Maldives	13%	12%
	Other	--	2%
	Not Considering	--	16%

Hawai'i's Top Destination Attributes vs Competitor Destinations

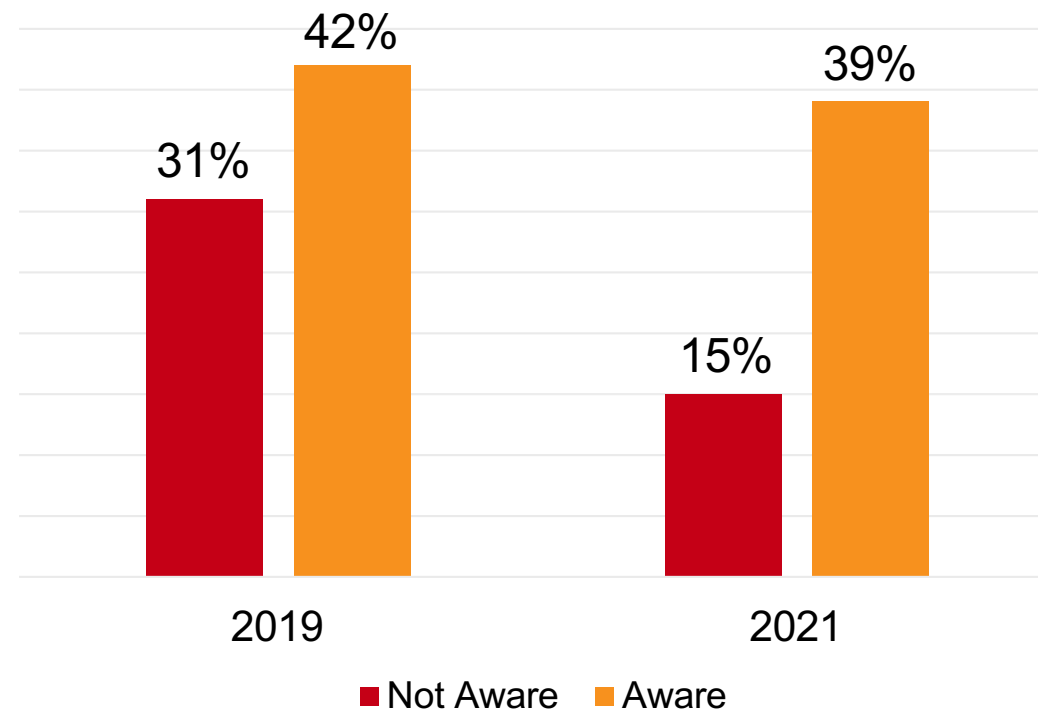
Hawai'i's Top 10 Destination Attributes vs Competitor Destinations							
	Hawai'i	Australia	Japan	Guam	Europe	Southeast Asia	U.S.A
1 Residents and visitors follow health/safety guidelines	49%	27%	20%	48%	9%	31%	9%
2 Easy to get there	48%	34%	20%	47%	25%	31%	18%
3 Great shopping	45%	20%	10%	31%	31%	11%	10%
4 Unique scenery unlike anywhere else	39%	37%	18%	32%	34%	35%	18%
5 Easy to navigate and get around	34%	39%	46%	27%	16%	11%	15%
6 Family-friendly/activities for children	33%	26%	24%	33%	15%	42%	11%
7 Romantic	30%	27%	46%	25%	16%	12%	12%
8 Has consistent/dependable experiences	30%	29%	21%	23%	22%	38%	18%
9 Quality culinary and dining experiences	29%	22%	21%	37%	11%	23%	11%
10 Authentic experiences	29%	21%	29%	29%	15%	41%	14%

Korea: Integrated Marketing Campaign (IMC) Awareness & Impact

Awareness



Impact on Travel Intentions (%Considering Hawai'i for Next Vacation)



Marketing Impact on Hawai'i's Destination Attributes

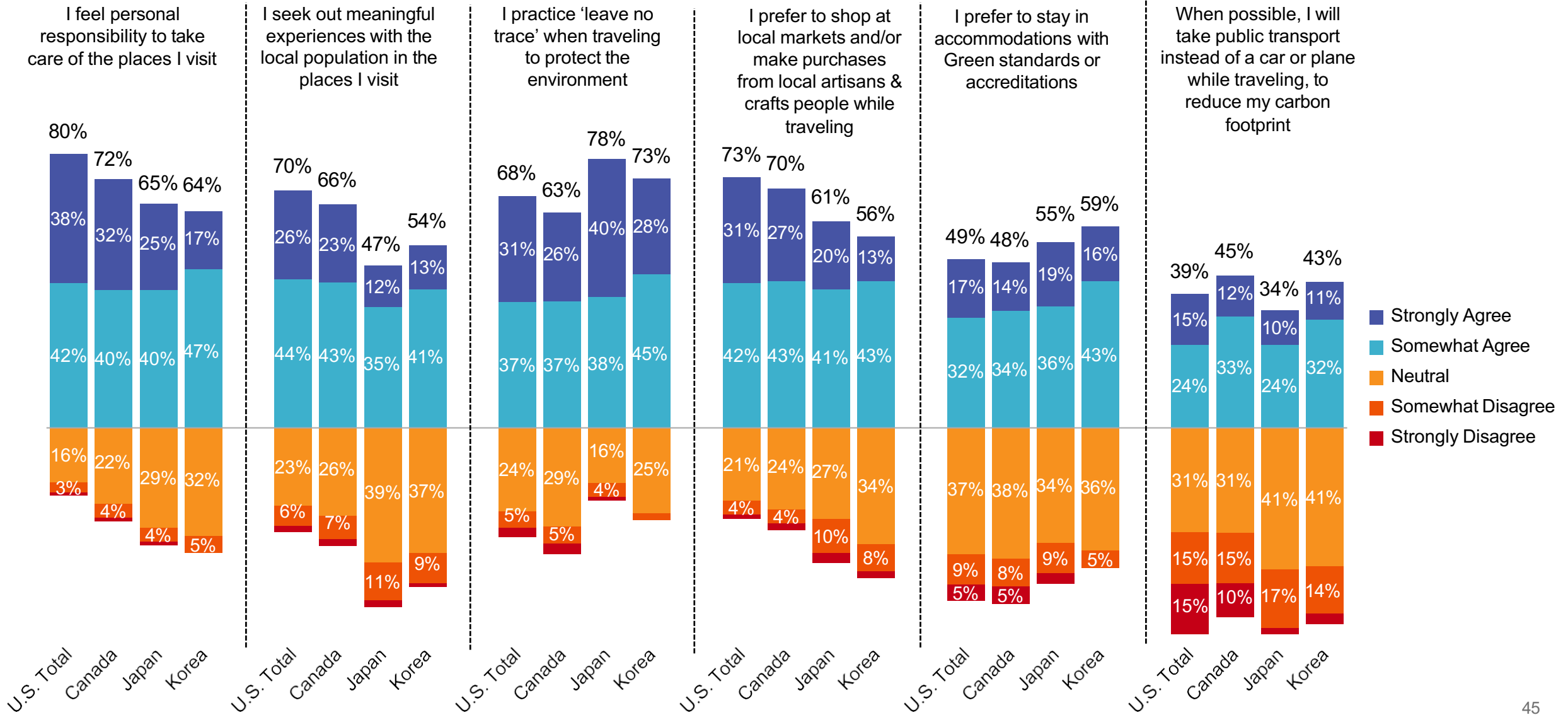
Destination Attribute	Difference
Easy to get there	+22 pts
Good value for the money	+19 pts
Residents and visitors follow health/safety guidelines	+19 pts
Easy to navigate and get around	+19 pts
Welcoming/open to people like me	+17 pts
Family-friendly/activities for children	+17 pts
Authentic experiences	+13 pts
Great shopping	+13 pts
Offers a different experience than other places	+13 pts
History and culture are intriguing	+12 pts
Has sustainable practices	+12 pts
Historic and cultural offerings	+12 pts
Safe and secure	+11 pts
Offers experiences with native people and their culture	+10 pts
Minimal crowds/not busy	+10 pts
Friendly local people	+10 pts
Variety of unique experiences and activities	+9 pts
Has consistent/dependable experiences	+9 pts
Clean environment	+6 pts
Quality culinary and dining experiences	+5 pts
Romantic	+1 pt
Unique scenery unlike anywhere else	0 pts
Opportunities to discover new activities and experiences	-2 pts
Sense of relaxation, a place to unwind and re-energize	-3 pts
Great place to get away from day-to-day life	-9 pts



Destination Attributes – Importance vs Hawai'i Rating



Sustainable Travel





Mahalo

from the Omnitrak Group

4

Presentation, Discussion, and/or Action to
Recommend Approval of the HTA Sports Program Strategy
and RFP

The background features a large white diamond shape centered on a light gray background. The diamond is outlined by a white border. In the four corners of the page, there are overlapping geometric shapes in shades of blue and green. The top-left and bottom-right corners have blue shapes, while the top-right and bottom-left corners have green shapes. The text is centered within the white diamond.

HTA Sports Sponsorship Strategy 2023-2025

Overview

HTA has traditionally evaluated sports sponsorships, both large and small, on a case-by-case basis. Each opportunity presented was looked at and considered on its own merits and not through the more focused lens of a larger overarching strategy. This has led to an inconsistent calendar of events with no uniform guidelines for selection, symmetry of branding or unifying set of community and economic goals. Over the next three years, the following workplan will attempt to correct those oversights by clearly identifying pillars of events and the desired outcomes of each. To do so there will be a series of RFPs to seek event sponsorship opportunities that meet HTA's sports partnership criteria. All proposals received will be thoroughly evaluated by HTA and HTA's strategic partners.

International Partnerships

It is HTA's intent to incorporate more international partnerships to both broaden our portfolio, but also reach potential visitors through their preexisting affinity for local leagues and teams. Aligning the Hawaiian Islands with the most popular team in our key source markets allows us to stay front of mind for new and return travelers. We have defined the sports in each MMA that have the highest cross-section of fans with the disposable income, interest in Hawai'i, and direct airline service to maximize our market penetration.

- Oceania – Rugby
- Japan - Baseball
- Korea – Golf
- China – Basketball
- Canada - Hockey (Vancouver, Alberta & Toronto)

HTA Sports Sponsorship Strategic Goals

- Enhance the brand awareness and marketing of the Hawaiian Islands
- Produce Community Benefits
- Generate Economic Benefits

**Adopted FY2022 by HTA Board*

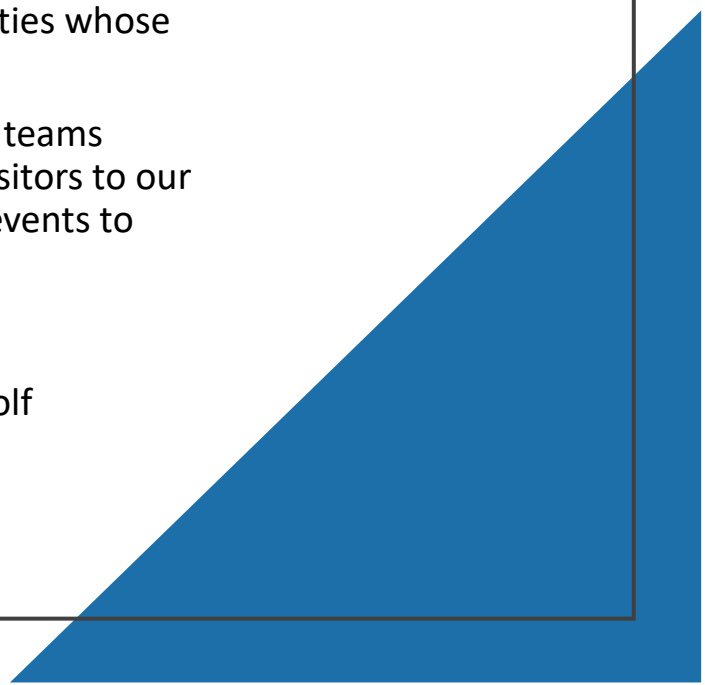
Pillar One – Marquee Partnerships

(1-3 annually)

Sponsorships in pillar one will either directly or indirectly couple the Hawaiian islands with globally relevant, instantly recognizable properties. These partnerships will elevate the brand of Hawai'i worldwide, create economic benefits of >\$5M and produce positive impacts in the communities whose natural resources they utilize.

HTA is committed to developing its support structure for collegiate and professional sporting teams seeking to hold tournaments, exhibitions, and other activities in Hawai'i, which can attract visitors to our islands and support our local economy. As part of this program, HTA requires all its sporting events to include a community engagement component as part of their proposal.

HTA will strategically prioritize partnerships in the Marquee tier with International Brands, Golf Sponsorship and professional or college teams located in our key domestic source markets.

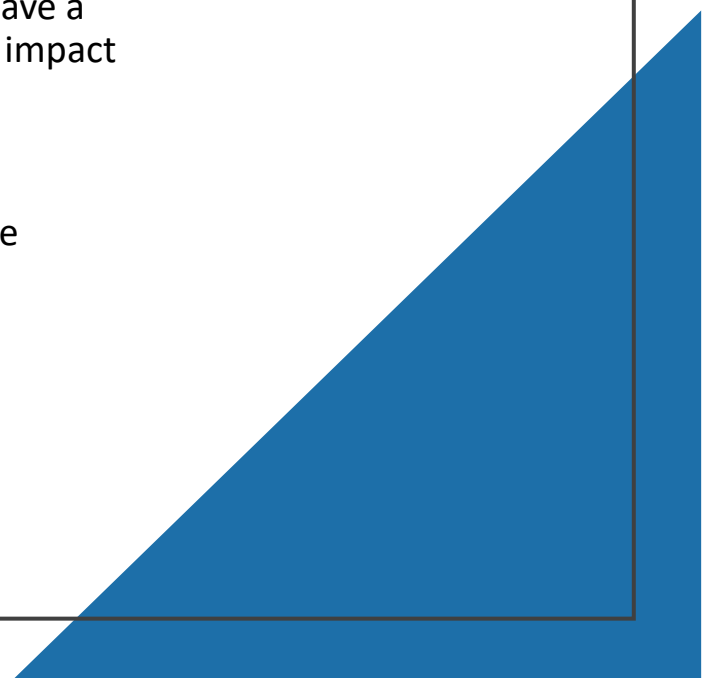


Pillar Two – Signature Partnership

(3-5 annually)

The overarching purpose of a Signature Event is to draw visitors to the Hawaiian Islands from outside of the State to attend or participate in high profile events. Signature Events are designed to have a high level of TV, web, and print exposure in the major market areas and significant economic impact as measured by the number of out-of-state participants.

HTA will strategically prioritize partnerships in the Signature tier with College Football, College Basketball and Professional Triathlons.

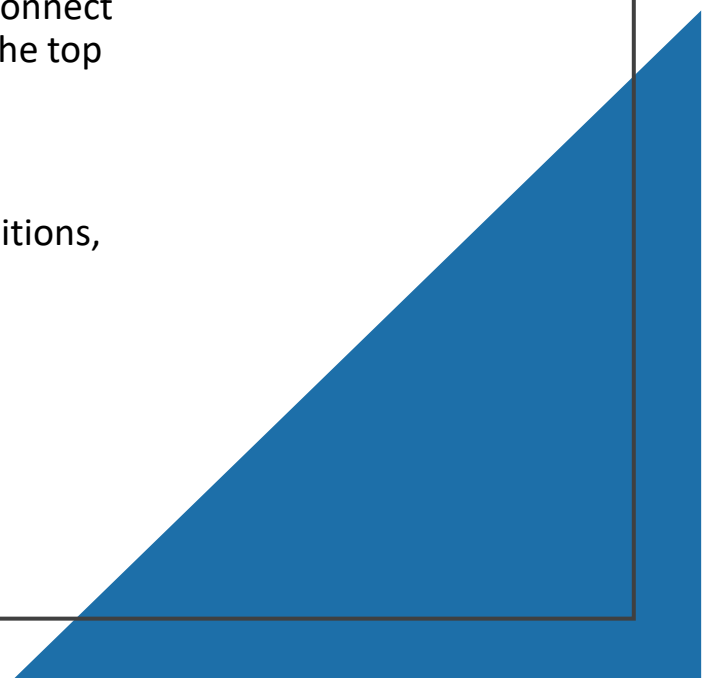


Pillar 3 – Hawai‘i Authentic

(6-8 annually)

Hawai‘i Authentic events started here. Across all islands, these events will couple traditional Hawaiian pursuits with existing brands and sponsors. These events will draw world-class athletes and connect with local residents. They will provide an opportunity for our communities to view up-close the top performers in sports that many grew up participating in, and are still active in, today.

HTA will strategically prioritize partnerships in the Hawai‘i Authentic tier with Surfing competitions, Beach Volleyball tournaments and Canoe Paddling races.



Pillar 4 – Community Partnerships

(12-15 annually)

HTA will continue to partner with sports events, activities, and competitions that serve to perpetuate Hawaiian and local culture that are significant to our community. These programs will attract state-wide, country-wide and international competitors, and raise their awareness and understanding of Hawai'i's unique sports history and culture through an authentic experience. These kinds of programs have proven to encourage and inspire healthy communities through interactions and engagement, as well as economic gain for residents and local businesses. Overall, these programs promote our sustainable tourism model. When appropriate HTA will fund culturally relevant programs through our Kūkulu Ola, Aloha 'Āina and Community Enrichment Program contracts.

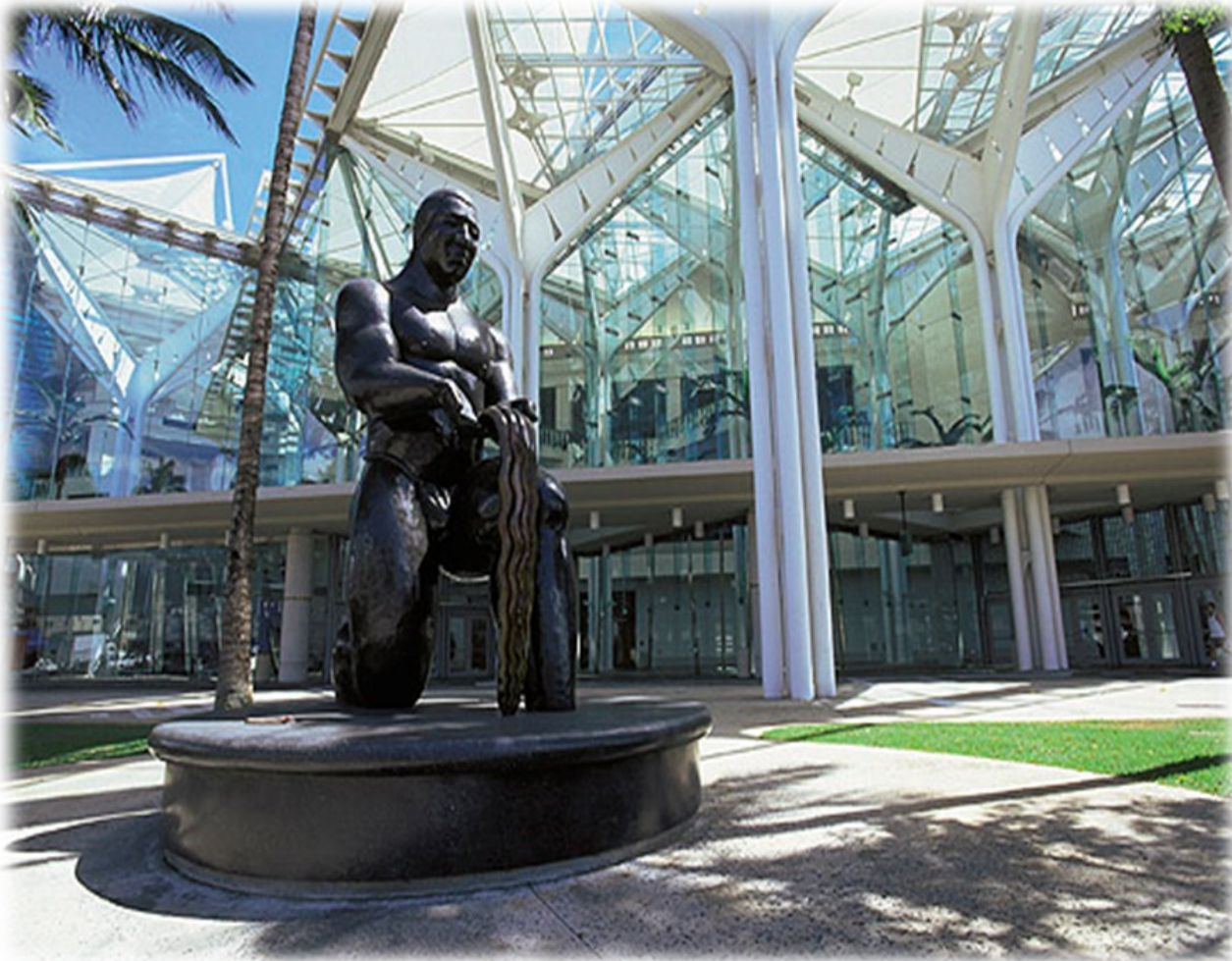
HTA will strategically prioritize partnerships in the Community tier with Rodeo's, Fishing Tournaments, Local Surfing Competitions, Local Paddling Competitions.

MAHALO

6

Presentation and Discussion on the Hawaii Convention Center and MCI Targets Review and Pace Report

Hawai'i Convention Center



Update for
August 2022
(September 2022 meeting)



Recent Events @ Hawai'i Convention Center

- 2022 Magic Island Hawai'i Classic Volleyball (Aug 26-27), 250 attendees
- Okinawan Festival (Sept 3 - 4), 35,000 attendees
- Jurassic Empire (Sept 10-11), 2000 attendees



Client Feedback

College Tournaments Hawaii LLC. would like to thank the Hawaii Convention Center, specifically Teri Orton (GM), Trevor Newman (Senior Sales Manager), Sherry Kaiwi (Director of Event Management), and Kealoha Chang (Events Manager) for making this first of its kind event all possible.

We look forward to a continued partnership for many more events.

Julian Nakanishi
Executive Director
College Tournaments Hawaii LLC



Definite Citywide Bookings for FY 2023

Start Date	End Date	Event Name	Forecast Attendance	Contracted Rooms	EI Value	Tax Generation
7/1/2022	7/3/2022	Pacific Rim Championship 2022 (Jam on It)	1,600	1,000	\$5,048,727	\$590,701
7/10/2022	7/15/2022	Goldschmidt Conference 2022	2,500	5,100	\$13,129,182	\$2,154,234
10/19/2022	10/28/2022	2022 Applied Superconductivity Conference	1,800	4,670	\$11,960,948	\$1,399,435
11/7/2022	11/16/2022	Confidential Association Meeting	3,500	8,371	\$23,728,741	\$2,776,263
4/11/2023	4/23/2023	American Roentgen Ray Society	2,500	3,844	\$18,342,486	\$2,146,071
	5	Total	11,900	22,985	\$72,210,084	\$9,066,704



Upcoming Local/Citywide Events

- Hula Halau 'O Kamuela 20th Anniversary Ho'ike (Sept 24), 1,200 attendees
- Hawai'i World Class Wedding Expo (Sept 24-25), 3,150 attendees
- 2022 Applied Superconductivity Conference (Oct 19-28), 1800 attendees



Definite Local Bookings for next 3 months

October 2022				
	Start Date	End Date	Description	Forecast Attendance
1	10/01/22	10/01/22	HPMG Annual Dinner	800
2	10/03/22	10/05/22	School Safety Conference	800
3	10/03/22	10/05/22	Applied Behavior Analysts Conference	150
4	10/07/22	10/07/22	HBR Candidate & Agent Forum	495
5	10/08/22	10/08/22	Universal ShowQueen Pageant...The Ultimate in Boy Beautiful	1,000
6	10/09/22	10/09/22	Gay Bowl XXII Closing Reception	800
7	10/12/22	10/12/22	Kalani High School PSAT Testing	370
8	10/14/22	10/14/22	2022 SHRM Hawaii Annual Conference	400
9	10/15/22	10/15/22	WorldRemit Hawaii Concert	1,000
10	10/15/22	10/15/22	Trinity Kings 11	800
11	10/16/22	10/28/22	NAVFAC Pacific Meeting	160
12	10/17/22	10/17/22	Stars of Oceania	300
13	10/17/22	10/17/22	PFA Hawaii	1,000
14	10/18/22	10/18/22	Global Breadfruit Summit	300
15	10/18/22	10/18/22	2022 Fall Honolulu National College Fair - NACAC	5,000
16	10/19/22	10/19/22	Lecture Hosted by Japan Hawaii Travel Association	150
17	10/19/22	10/19/22	Schools of the Future (Jamf Pre-Conference Sessions)	30
18	10/20/22	10/22/22	Schools of the Future Conference	1,500
19	10/20/22	10/20/22	Schools of the Future - HCF Dinner	50
20	10/24/22	10/26/22	Pacific Tech 2022	150
21	10/25/22	10/25/22	Matt Tsuruda Organizational Open	280
22	10/26/22	10/26/22	Yamamoto Organizational Open	350
23	10/28/22	10/28/22	Water Resilience in Hawaii, A UH Innovation Conference	200
24	10/28/22	10/28/22	Professional Community Day - Session 2	150



Cont...

Definite Local Bookings for next 3 months

November 2022				
	Start Date	End Date	Description	Forecast Attendance
1	10/31/22	11/03/22	TRY Group 2022	100
2	11/01/22	11/02/22	Honeymoon Friends Filming	365
3	11/04/22	11/04/22	HMSA Annual Meeting	1,000
4	11/04/22	11/04/22	Hawaii Food & Wine Festival - On Cloud Wine	1,000
5	11/05/22	11/05/22	Hawaiian Dredging Construction Company's Annual Dinner and Service Awards Banquet	500
6	11/16/22	11/16/22	Protect Our Water Conference	200
7	11/17/22	11/17/22	Cancer Survivorship Conference	250
8	11/18/22	11/20/22	Coin Show Expo 2022	1,000
9	11/18/22	11/18/22	PBX-22	2,000
10	11/18/22	11/18/22	Hawaiian Electric Annual Leadership Meeting	300
11	11/18/22	11/20/22	Hawaii Pacific Model United Nations	350
12	11/19/22	11/19/22	Shawn Ray Hawaiian Classic 2022	1,000
13	11/19/22	11/19/22	EMT I Written Test	400
14	11/26/22	11/27/22	Aloha Region Thanksgiving Tournament	3,000
15	11/26/22	11/26/22	Dragon Beat Recital/Dragon Beat Taiko Drumming Concert with Tsutomu Nakai	400
16	11/26/22	11/26/22	Super Saturday Showcase	1,000





Cont...

Definite Local Bookings for next 3 months

December 2022				
	Start Date	End Date	Description	Forecast Attendance
1	12/02/22	12/02/22	Honolulu Board of REALTORS General Membership Meeting	1,200
2	12/02/22	12/03/22	Central Pacific Bank Holiday Party	1,000
3	12/03/22	12/03/22	Helping Ohana - Casino Night	350
4	12/04/22	12/04/22	Hawaii Youth Symphony - Symphony Program Winter Concert 2022	400
5	12/08/22	12/12/22	2022 Honolulu Marathon Expo	20,000
6	12/10/22	12/10/22	JROTC Military Ball	950
7	12/10/22	12/11/22	Ho'omau Hawai'i Market	3,500
8	12/16/22	12/16/22	Holiday Pa'ina Lunch	30
9	12/17/22	12/19/22	Hoops in Hawaii 2022	1,000
10	12/17/22	12/18/22	Aloha Region Christmas Festival	3,000
11	12/17/22	12/17/22	120th Anniversary of Immigration - America Opening Concert	450



Tentative Local Bookings for Next 3 Months

Start Date	End Date	Event Name	Forecast Attendance
11/18/22	11/18/22	Kaiser Permanente - Sales Team Building Meeting	90
11/18/22	11/18/22	Kaiser Permanente - Quality Meeting	35
11/18/22	11/18/22	Kaiser Permanente - Nursing Leadership Training	50
12/01/22	12/05/22	Confidential	1,400
12/05/22	12/09/22	HTA Fall Tourism Update	1,000
12/11/22	12/16/22	AECOM - HRD-H 65% Ph1 Design Review Meeting	100
12/19/22	01/03/23	Holiday Show	0



Mahalo Nui Loa

A close-up photograph of a sailboat's rigging. The image shows a complex network of white ropes and lines. In the foreground, a wooden boom is visible, with a pulley block attached. The background is slightly blurred, showing more of the boat's structure and some greenery. The text "Mahalo Nui Loa" is overlaid in the center in a white, sans-serif font.



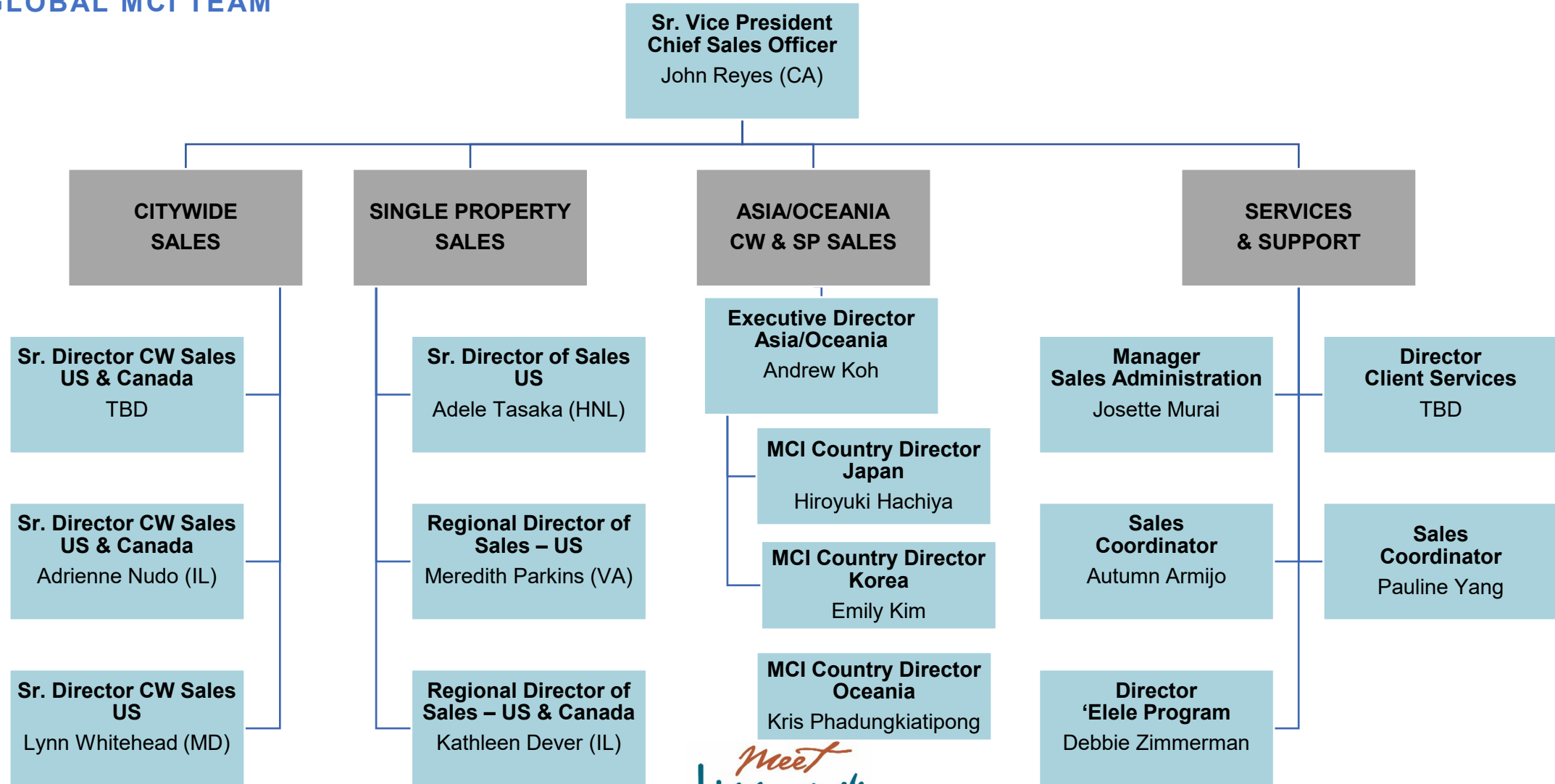
**HTA BRANDING STANDING
COMMITTEE
GLOBAL MCI – CITYWIDE REVIEW
September 2022**

John Reyes

Senior Vice President

Chief MCI Sales Officer

GLOBAL MCI TEAM



CITYWIDE STARTING POINT



The Basics

Who are we targeting? Medical/Scientific/Technology
(Associations and Corporate)

What are the Sales Goals?	<u>Definite RN</u>	<u>Tentative RN</u>
CY 2022	67,450	207,750
CY 2023 (Proposed)	101,700	240,087

Why are there not more citywide events? Historical Lead Time
- Is there a strategy? Target Events Year

Why should we invest in the Convention Center? \$795,153,854



IT STARTS WITH SALES

Pre 2020: Hawai'i Convention Center oversees citywide sales/marketing

January 2020: Meet Hawai'i / HVCB assumes citywide sales/marketing

Citywide

Structure

	Pre-Covid	Covid	Post Covid
Sellers:	5	*	3**
Client Services:	1	*	1
Coordinators	2	*	2

* Eliminated Citywide Sales absorbed by Single Property Sellers

**Two of Three Citywide Sellers have been aboard less 1 year



Historical Lead Time

While the TAP report considers both historical and future lead times to calculator pace targets, a simple illustration of historical lead times on bookings is helpful to appreciate the length of time sales managers need to be working on events prior to arrival. In other words, sales managers need to be working events four years in advance for the lowest Tier I events of 1,000-1,499 peak room events.



2 synergize

EVENT PLACEMENT

Describes the most important business opportunities for Hawai'i Convention Center citywides by establishing three tiers based upon the event's peak room night requirement.

- | | | | |
|--------------|----------------------------|--|---------------------|
| ▪ Tier One | > 1,000 on peak | Long Term (Medical, Scientific, Technology)
(Midwest 38%/East-Southeast 41%/West 11%/Intl 10%) | 4 – 9 yrs |
| ▪ Tier Two | 250 – 999 on peak | Short Term Need Strategy
(Corporate/Association/Sports) | 2 – 3 yrs |
| ▪ Tier Three | Local / Less than 250 peak | (Corporate/Sports) | > 6 month |

BOOKING GUIDELINES: Used for prospecting and solicitation of citywide events. Key variables Time of Year, Peak Rooms of Events, Amount of Exhibit Hall, Control HCC Inventory, Free Sale Clause, Multi-Year Bookings

STAKEHOLDER EVENT RATING

1. Time of Year
2. Rate Range
3. Food Beverage Spend



Citywide Lead Time

CY	Tier 1	Tier 2	Tier 3
Year	<u>1,000+</u>	<u>>999</u>	<u>>250</u>
2022	2026	2025	2022
2023	2027	2025	6-month window
2024	2028	2026	2024
2025	2029	2027	2025



Current OTB # Events & Peak By Year

Peak Room Size	TARGET	2023	2024	2025	2026	2027	2028	2029	2030	2031
Tier III Less 250	8	2								
Tier II 250-499	8	2	2							
500-999										
Tier 1 1000 – 1499	11	4	4	6	1				1	
1500 – 1999										
2000 --2999										
3000-3999										
4,000 greater										
Total # of Events	27	8	6	6	1	0	0	0	1	0
Total Room Nights										



Future Target Goals by # Events & Peak By Year

Peak Room Size	TARGET	2023	2024	2025	2026	2027	2028	2029	2030	2031
Tier III Less 250	8	4	6	6	8	8	8	8	8	8
Tier II 250-499	8	4	6	8	8	8	8	8	8	8
500-999										
Tier 1 1000 – 1499	11	4	4	6	8	11	11	11	11	11
1500 – 1999										
2000 --2999										
3000-3999										
4,000 greater										
Total # of Events	27	12	16	20	24	27	27	27	27	27
Total Room Nights										



FUTUREPACE CONVENTION CENTER 8 YEAR PACE



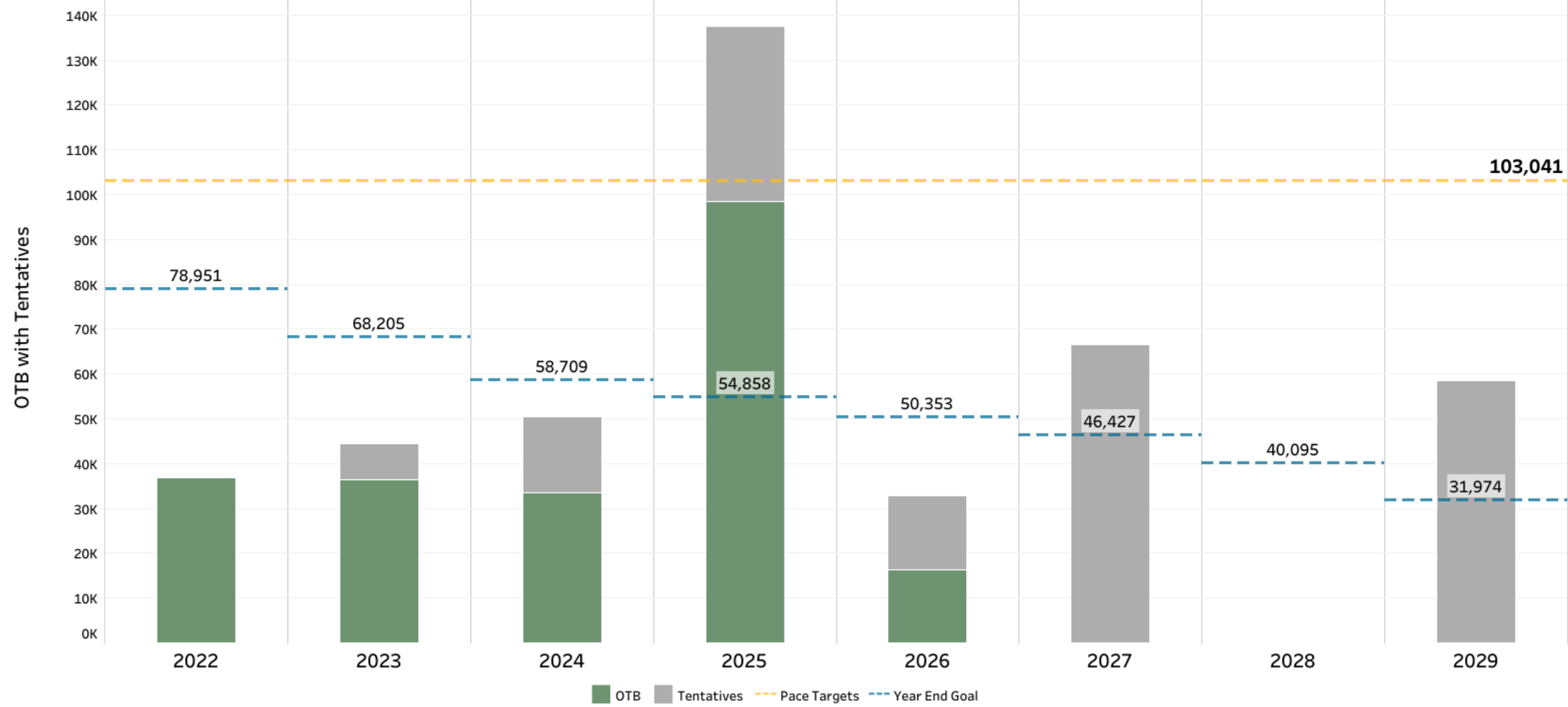
Hawai'i 8 Year Future Pace for Citywide

Number of events and room nights on the books for each year 2022-2029 against a 3-year average year-end goal. Data last refreshed on 8/9/2022 11:05:34 PM

- Citywide
- Single Property



	2022	2023	2024	2025	2026	2027	2028	2029
% to Target	47%	53%	57%	179%	32%	0%	0%	0%



PRIORITY 1: BOOK SHORT-TERM CITYWIDE BOOKINGS 2023 - 2026

Meet Hawai'i priority is to book short-term citywide groups 2023 – 2026 and optimize placement of high value citywide events for 2027 and beyond.

Short-term Citywide Groups (2023 – 2026)

Meet Hawai'i has a list of high value citywide customers already being targeted by our citywide sales team to fill short-term (2023-2026) booking opportunities for the Hawai'i Convention Center.

- Focus on Midwest and East Coast accounts where Meet Hawai'i has two veteran citywide sellers remotely located in Chicago and greater Washington DC area.
- Focus on Corporate Groups booking window one year to three-year window
- Oceania/Japan: Meet Hawai'i has added a Global MCI Team and starting to work on citywide opportunities from Oceania and Japan
- Sports Groups: Meet Hawai'i in partnership with Hawai'i Convention Center are working closely to book short-term sports groups



PRIORITY 2: BOOK LONG-TERM CITYWIDE GROUPS 2027 AND BEYOND

Meet Hawai'i specific target audience for long-term citywide bookings for 2027 and beyond are national associations who plan their annual meetings five plus years out. Meet Hawai'i will also prospect single property event opportunities from these accounts

- US Associations: 11 national association 2027, 2028 and 2031 open dates
- Asia: Large incentive groups 2,500 – 3,500 pax with group pattern of four to five nights/
Leading Third Parties
- Third-Party Planners: Representing citywide groups, Conference Direct, Maritz Global Events,



CURRENT PRODUCTION VS LAST YEAR

2022 Sales Production	2022 Annual Target	Aug 22 MTD	Aug 21 LYMTD	Variance	2022 YTD	2021 LYTD	Variance
Total Citywide Tentative RN	207,750	62,239	31,670	+197%	198,002	94,123	+210%
Total Citywide Definite RN	67,450	5,000	3,911	+128%	34,170	3,911	+++
Total Single Property Tentative RN	571,900	35,146	27,551	+128%	324,135	315,600	+3%
Total Single Property Definite RN	153,600	25,205	1,236	+++	93,205	41,092	+222%



CURRENT PRODUCTION VS. 2019

2022 Sales Production	2022 Annual Target	August 22 MTD	August 19 LYMTD	Variance	2022 YTD	2019 LYTD	Variance
Total Citywide Tentative RN	207,750	62,239	71,240	-13%	198,992	241,402	-18%
Total Citywide Definite RN	67,450	5,000	0	+++	34,170	22,520	+52%
Total Single Property Tentative RN	571,900	35,146	46,117	-24%	324,135	458,972	-29%
Total Single Property Definite RN	153,600	25,205	4,298	+586%	93,205	90,069	+3%



ACTIVE OPPORTUNITY LIST

CY Year	# Tentative Events by Year	Tentative Rooms by Year	Active Close	Definite RN Impact
2023	2	8,105	2	8,105
2024	3	16,911	2	16,911
2025	4	39,145	1	34,126
2026	3	16,545	3	16,545
2027	5	66,406	3	58,758
2028	0	0	0	0
2029	3	58,439	2	15,089
2030	0	0	0	0
2031	0	0	0	12,150
2032	1	12,150	1	0
Total	20	217,701	15	132.454



MAHALO!

