



HAWAII TOURISM AUTHORITY

Hawaii Convention Center
1801 Kalākaua Avenue, Honolulu, Hawaii 96815
kelepona tel 808 973 2255
kelepa'i fax 808 973 2253
kahua pa'a web hawaii tourismauthority.org

David Y. Ige
Governor

George D. Szigeti
President and Chief Executive Officer

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

REGULAR MARKETING STANDING COMMITTEE MEETING HAWAI'I TOURISM AUTHORITY

Po'akolu, lā 29 o 'Aukake, 2018, 2:30 PM

Wednesday, August 29th, 2018, 2:30 PM

*Kikowaena Hālāwai O Hawai'i
Lumi Papa Ho'okō A
1801 Alaākea Kalākaua
Honolulu, Hawai'i 96815*

Hawai'i Convention Center
Executive Board Room A
1801 Kalākaua Avenue
Honolulu, Hawai'i 96815

Papa Kumumana'o AGENDA

1. *Ho'omaka*
Call to Order
2. *'Āpono I Ka Mo'o'ōlelo Hālāwai 26 Iulai 2018*
Approval of Minutes from the July 26th, 2018 HTA Marketing Standing Committee Meeting
3. *Hō'ike No Ka Palapala Ho'olālā Me Mo'ohelu*
HTA Brand Management Plan & Budget
4. *Hō'ike Noi'i*
Research Presentation
5. *Hō'ike Hokona Ha'uki ****
Sports Marketing Update ***
6. *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) and §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 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 Hawai'i Revised Statutes (HRS) § 92-4. The executive session will be conducted pursuant to § 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; and to discuss information that must be kept confidential to protect Hawai'i's competitive advantage as a visitor destination.



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He kono kēia i ka po'e e hō'ea i ka 'aha ho'olohe no ka hāpai mana'o ma o ka waha a i 'ole ma o ke kākau. No ka po'e e makemake ana e kākau i ko lākou mau mana'o kāko'o/kāko'o 'ole, ua pono ko lākou ho'ouna 'ana aku i kā lākou 'ōlelo hō'ike ma mua o ka 'ōlelo ho'olohe. Hiki ke ho'ouna 'ia iā naomi@gohta.net; ma o ka hooouna 'ana aku i leka (e ho'ouna i ka helu wahi o luna); a i 'ole ma o ke kelepa'i 'ana aku. No ka 'ikepili hou aku e pili ana i nā kumuhana kūikawā, e kelepona aku iā Naomi Sjoquist ma kāna kelepona (808) 973-2279 he 'ekolu (3) lā ma mua o ka hālāwai.

Members of the public are invited to attend the public meeting and provide oral testimony on any agenda item. Written testimony may also be provided on any agenda item by submitting the testimony prior to the meeting to the HTA by email to Naomi@gohta.net; by mail at the above address; or by facsimile transmission. Any person requiring special assistance to participate in the meeting, please contact Naomi Sjoquist (973-2279) no later than 3 days prior to the meeting so arrangements can be made.

Agenda item #2

Approval of Minutes
from the July 26th, 2018

HTA Marketing
Standing Committee
Meeting



**MARKETING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Thursday, July 26, 2018
Hawaii Convention Center
1801 Kalākaua Avenue, Honolulu, Hawaii 96815**

MINUTES OF MARKETING STANDING COMMITTEE MEETING

COMMITTEE MEMBERS PRESENT: Sean P. Dee (Chair), Fred Atkins, George Kam, Kelly Sanders, Sherry Menor-McNamara

COMMITTEE MEMBERS NOT PRESENT:

BOARD MEMBER PRESENT: Rick Fried

HTA STAFF PRESENT: George Szigeti, Marc Togashi, Charlene Chan, Kalani Ka'anā'anā, Jadie Goo, Minh-Chau Chun, Caroline Anderson, Chika Miyauchi, Laci Goshi, Naomi Sjoquist, Christina Wieand

GUESTS: John Monahan, Jay Talwar, Katherine Stokoe, Rep. Richard Onishi, Peter Honig (by phone)

LEGAL COUNSEL: Gregg Kinkley

1. Call to Order

Presiding Officer Sean P. Dee called the meeting to order at 7:32 a.m. Presiding Officer Sean Dee acknowledged Kalani Ka'anā'anā, who offered an oli.

2. Approval of the Minutes from the June 27th, 2018 HTA Marketing Standing Committee Meeting

Mr. Dee requested a motion to approve the minutes from the June 27, 2018 Marketing Standing Committee meeting. Mr. Kam so moved. Mr. Sanders seconded the motion, which

was approved by all committee members present.

3. HVCB Island of Hawai'i Recovery Plan Proposal

Mr. Dee acknowledged Jay Talwar and John Monahan from the Hawai'i Visitors Convention Bureau ("HVCB") who began their presentation by reporting visitor statistics through July 12, 2018. Mr. Talwar presented that HVCB's objective in its Island of Hawai'i Recovery Plan Proposal was to balance negative news coverage and show prospective visitors an opportunity to visit, and that one of the ways HVCB was doing so was by working with partners on Hawai'i Island to coordinate activities and to create social media content, using the hashtag #exploreislandofhawaii. He stated that, in connection to Hawai'i Island's recovery plan, HVCB participated in 46 media interviews and 63 in-bound media inquiries. Mr. Talwar explained that in-bound media inquiries are when HVCB provides information to media outlets concerning what is taking place on-island.

Mr. Talwar explained that he worked with Jeanie Cooper in creating a Travel Weekly native advertising editorial. Mr. Dee commented on a Travel Weekly forum and asked Mr. Talwar to consider focusing on unique story-telling, including touching on Pele and the story of creation.

Mr. Talwar explained that HVCB performed a Satellite Media Tour and worked with the head of Geology at the University of Hawai'i at Hilo to tell a balanced and clear story of the volcanic activity on Hawai'i Island. He explained that the geologist travelled on the Satellite Media Tour, which was broadcasted live across the country and picked up on 32 TV and radio stations. Mr. Talwar also explained that a photoshoot was planned for August to supplement partner-provided #exploreislandofhawaii content. He explained that the content was intended to highlight a multitude of activities in different locations, to display Hawai'i's unique culture beyond the volcano, to show that visitors can still have an amazing experience on Hawai'i Island.

Mr. Monahan explained that hard numbers on the success of the Hawai'i Island Recovery Plan were difficult to track down due to statistics received on an individual basis. Mr. Monahan stated that arrivals and expenditures were up 12.5 percent from the previous year. He stated that arrivals were down 1.6 percent and spending was up 3.3 percent for May compared to this time last year. Mr. Monahan explained that, from statistics received from partner wholesalers that share their booking statistics, those wholesalers were up 20 percent prior to the volcanic eruption in April compared to the same time last year; in May, booking rate was down 46 percent, and in June, booking rate was down 43 percent. Mr. Monahan further explained that occupancy rate for Hawai'i Island was up 6 percent, but was down 11 percent in the Kohala Coast. Revenue per available room ("RevPAR") was up 5 percent in Hawai'i, but down 8 percent on Hawai'i Island and down 11 percent in the Kohala Coast. Mr. Monahan explained that the low statistics for Hawai'i Island and Kohala Coast were due to tourists wishing to avoid being "vogged out," even though they may understand that they are safe travelling to Hawai'i, as well as tourists wishing to see the volcanic activity. Mr. Monahan explained that these statistics were most likely the lowest numbers we can expect.

Mr. Atkins asked Mr. Monahan whether these statistics included the impact from cruise ship arrivals. Mr. Monahan, in response to Mr. Atkins' question, stated that the statistics were solely looking at accommodations, so the statistics did not take visitor arrivals through cruise ships into account.

Mr. Talwar stated that a recent nationwide survey conducted by HVCB showed Hawai'i-targeted travelers have more fascination with the volcanic activity on Hawai'i Island than fear. He said that, based on this information, HVCB is changing its marketing strategy to change prospective visitor's perspectives to "this is the best time to visit Hawai'i."

Mr. Talwar then discussed tactics, grouped into five topics: content development; earned media; consumer advertising; travel agent/ sales channel; and MCI. First, Mr. Talwar stated that for content development, HVCB planned to find positive video and stills to build viewer fascination with volcanic activity and promote Hawai'i using social media. He stated that HVCB plans to license additional stills and footage. Mr. Talwar stated that, for earned media, HVCB will continue to work on countering misconceptions on the extent and effect of volcanic activity. He stated that HVCB will work to round out the story of Hawai'i Island, not solely about the volcano but for experiences around the entire island. Mr. Talwar stated that, for consumer advertising, HVCB would support a particular storyline to convey to its targeted audience, which include people who are interested and care about unique cultures around the world. He stated that HVCB would run a campaign—Hawai'i Rooted integration—based on the cultural story of Pele and creation. He stated the campaign would include a relationship with the platform Great Big Story to create a video campaign with two to three editorial videos. Mr. Talwar stated that HVCB would continue to monitor data from travel agents regarding sales; he said that HVCB would like to help travel agents close sales by developing its own marketing program to focus on what HVCB believes will bring the most sales to Hawai'i Island. Mr. Talwar stated that HVCB would connect with the MCI market through getting face-to-face opportunities with key partners in Hawai'i and across the country.

Mr. Talwar stated that, in total, the amount HVCB requested was \$1,200,000. That amount was broken down to \$100,000 for content development, \$100,000 for earned media, \$700,000 for consumer advertising, \$250,000 for supporting travel agent sales, and \$50,000 for MCI marketing.

Mr. Atkins asked how HVCB has addressed vog created by volcanic activity on Hawai'i island. Mr. Monahan responded that representatives need to respond truthfully to concerns over vog. Mr. Kam and Mr. Sanders noted that vog has always been present on Hawai'i Island; in response, Mr. Monahan stated that he understands vog has been much more frequent. Representative Richard Onishi, in discussing Mr. Atkins' question regarding vog, stated that the volcanic crater has subsided in major activity and no longer constantly releases ash. He stated that there is still a residual effect from the vog, but there have not been large ash clouds raining down. Rep. Onishi stated that, in summary, the vog is not an event that Hawai'i Island has never dealt with before. He stated that one of the biggest problems from this most recent eruption

facing the County of Hawai'i is earthquakes, occurring two to three times per week, that have created cracks in Highway Eleven on Hawai'i Island. He also stated that the County of Hawai'i has been searching for a new viewing site continuously for a month and a half, and that one of the options the County was considering was doing a "riding tour," where guides will show visitors where the lava flow is occurring. He explained that, during these riding tours, no visitors will be allowed to get off the bus, in order to protect visitors from fumes. Last, Rep. Onishi stated that helicopter tours and boat tours have been doing very well due to visitors interested in the volcanic activity, and both are booked weeks in advance.

Mr. Atkins stated that Jack's Tours, a Hawai'i Island bus company, recently told its industry partners it intended to close at the end of the month of July, and that the volcanic activity on Hawai'i Island was one of the reasons why Jack's Hawai'i announced its closing. Mr. Szigeti stated that, in finding a new viewing site, there are several moving parts, and that Mr. Monahan has also been assisting in trying to find a new viewing site. Mr. Atkins asked whether the bus tours have been able to find other activities to fill the void caused by the lack of a viewing site for the volcano. Rep. Onishi responded that there has been a positive response to the current bus tours that do not include the volcano. Mr. Kam asked on the status of businesses in Pahoehoe. Rep. Onishi stated that Pahoehoe is challenged because many restaurants depended on a large number of visitors to the national park in the area.

Mr. Dee asked whether HTA had \$4 million in its reserve. Mr. Togashi responded that HTA currently had approximately \$4.2 million in reserve. Mr. Dee stated that supporting marketing efforts in response to the volcanic activity in Hawai'i Island matches the intent of creating the reserve. Mr. Atkins asked if HVCB's plan was flexible. Mr. Talwar replied that the plan is flexible and that several content creators are interested in coming to Hawai'i Island.

4. Global Tourism Summit Update

Mr. Dee acknowledged Katherine Stokoe from Paragon Events, who presented an overview of HTA's preparation for the Global Tourism Summit. Ms. Stokoe presented that 2018 presented increased goals from the 2017 Global Tourism Summit. She explained that booking for registrations with the Global Tourism Summit was on target with 233 current registrations, and that early bird pricing for registration would end on July 31, 2018. Ms. Stokoe stated that the opening keynote speaker is still pending, and that the Summit will now include a general session topic on illegal vacation rentals. Mr. Szigeti stated that the added topic of illegal vacation rentals was important, that the Summit will bring additional speakers, and that the event should be well-attended.

Ms. Stokoe stated that exhibit booths have increased by forty percent, and that confirmed sponsors include Alaska Airlines, HCC AEG Facilities, HanaTour USA, Rocky Mountain Sunscreen, Levy, and Honolulu Cookie Company. Mr. Szigeti added that the Summit was looking to add First Hawaiian Bank, as well as committing to luncheon and hotel sponsors. Ms. Stokoe stated that several sponsors are close to being finalized, including Enterprise, Kualoa Ranch, Southwest Airlines, Hawaiian Airlines, Japan Airlines, O'ahu Publishing, and Outrigger.

Ms. Stokoe explained that the Global Tourism Summit was advertising through media outlets, including the Star Advertiser and social media. Mr. Szigeti thanked Ms. Stokoe and commented that the Aloha Reception would showcase restaurants from all islands, and that major wholesalers are contributing. Mr. Szigeti added that the Global Tourism Summit is aiming for 3,000 attendees.

Mr. Atkins thanked Mr. Szigeti for aggressively pursuing key sponsors, and that large corporate sponsors bring the Global Tourism Summit prestige. Mr. Atkins expressed that the Global Tourism Summit was reaching its "critical mass" and has become an international event. Mr. Atkins suggested that the Global Tourism Summit advertise who its sponsors are to show the interest that the Summit has generated.

5. Sports Marketing Update

Mr. Dee acknowledged Peter Honig, Senior V.P. of Ascendent, who participated by phone, to discuss updates in sports marketing, including a follow-up proposal from the Los Angeles Rams and involving other stakeholders.

Mr. Dee stated that the Committee needed to enter into Executive session for the remainder of this topic, in order to protect proprietary information and confidential negotiations, and to protect Hawai'i's competitive edge as an international destination. Mr. Dee added that Executive Session is allowed by Hawai'i Revised Statutes sections 201B-4(a)(1)&(2). Mr. Dee requested a motion to enter Executive Session. Mr. Kam moved for an Executive Session and Mr. Atkins seconded the motion, which was unanimously approved by all Committee members present. Mr. Dee invited Rep. Onishi, Mr. Talwar and Mr. Monahan to remain in the Executive session of the meeting.

**The meeting was recessed for an Executive Session at 8:27 a.m.
Executive Session ended at 9:30 a.m.**

6. Budget Update

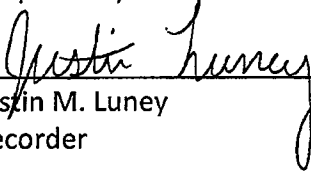
The Marketing Committee did not address the budget update, due to time constraints.

7. Adjournment

Mr. Dee requested a motion to adjourn the meeting. Mr. Kam so moved. Mr. Sanders seconded the motion, which unanimously approved by all the Committee members present.

The meeting was adjourned at 9:30 a.m.

Respectfully submitted:


Justin M. Luney
Recorder

Agenda item #4

Research Presentation

EVENTS RESEARCH AND EVALUATIONS

Presented to
HTA Marketing Standing Committee
August 29, 2018

HAWAII TOURISM
AUTHORITY

HTA Festivals, Events, & Sports Research and Evaluations

- Resident Sentiment
- Pre Award:
 - Festivals & Events: RFP Process
 - Sports: Ascendent Scorecard (Sports Strategy)
- Post Event:
 - Contractor Program Report
 - Festivals & Event Evaluation Program
 - Nielsen/Repucom
 - SMG Insights/You.Gov
 - Also includes media analysis
 - Ascendent Sponsorship Impact Report
 - A one time report intended to supplement Nielsen



HTA Resident Sentiment Survey Fall 2017



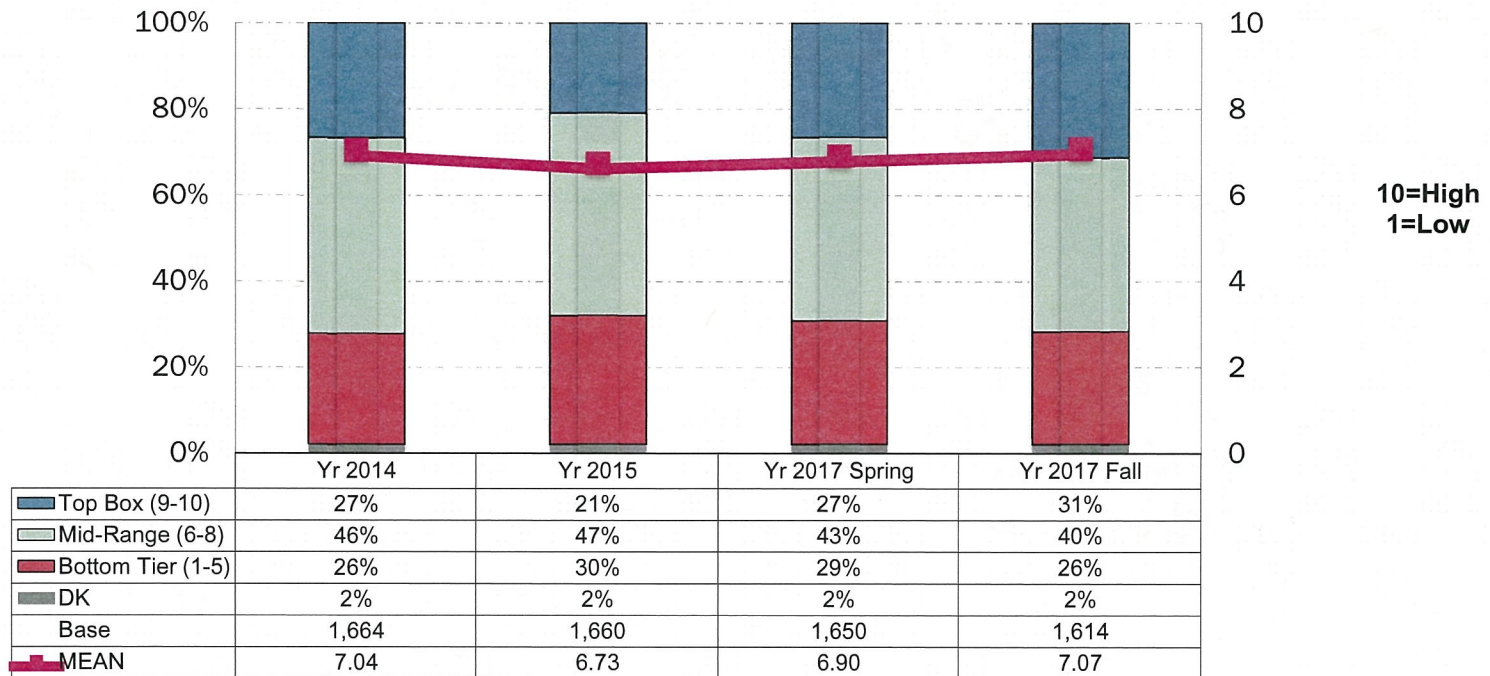
Prepared for the:
Hawai'i Tourism Authority: Project #5582
March 2018



 **OmniTrak Group Inc.**

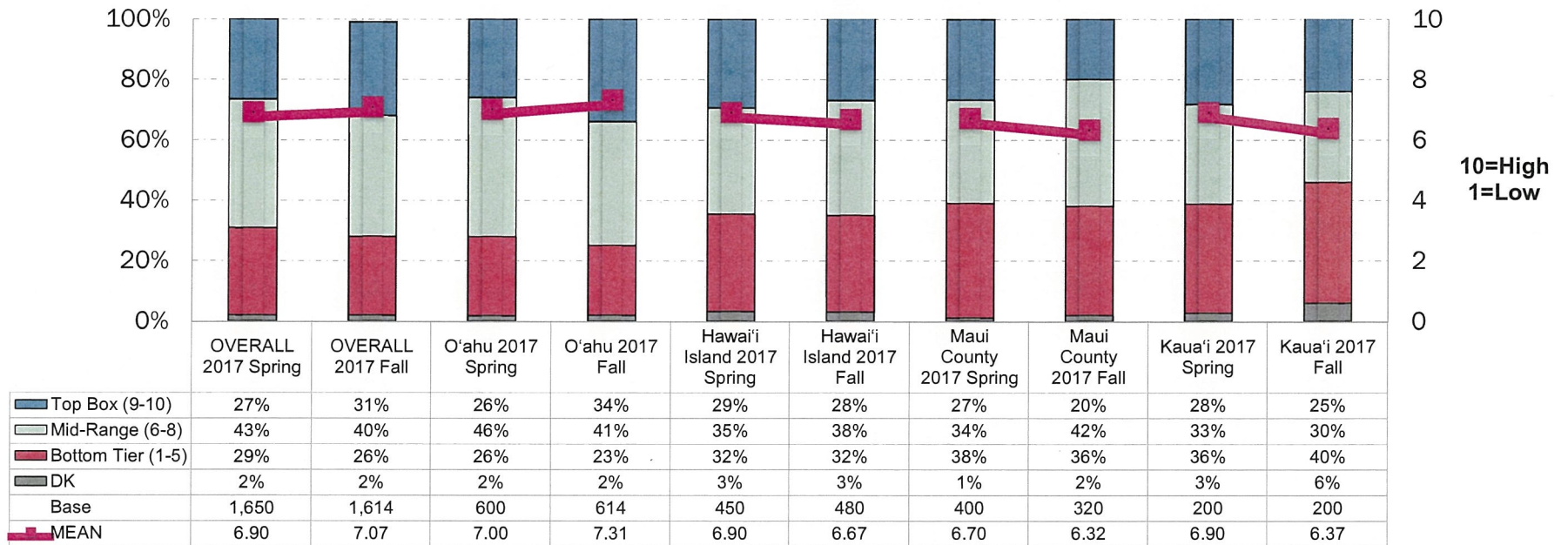
Davies Pacific Center 1250, 841 Bishop Street, Honolulu, Hawai'i 96813
Telephone: 1-808-528-4050; Fax: 1-808-538-6227
www.omnitrak.com

“Sponsors festivals, activities, & sports events for residents & visitors” - Overall



Q3.7. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Sponsors festivals, activities, & sports events for residents & visitors” – *By Island*



Q3.7. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

Festivals & Events Evaluation

- Economic Impact
- Event Satisfaction
- Tourism Impact
- Community Impact

2017/2018 Events

1. Aloha Festivals
2. LA Clippers Hawai'i Classic
3. Ironman World Championship
4. Hawai'i Food & Wine Festival
5. Hawai'i Tennis Open
6. Maui Invitational
7. Tournament of Champions
8. Sony Open
9. Waimea Town Celebration
10. Merrie Monach Festival
11. Lotte Championship
12. MAMo – Maoli Arts Movement

Festivals & Events Evaluation

2018/2019 Events

1. Prince Lot Hula Festival
2. Kōloa Plantation Days
3. Moloka'i 2 O'ahu
4. Dukes Oceanfest
5. Queen Lili'uokalani Long Distance Canoe Races
6. Aloha Festivals
7. AVP Hawai'i Invitational (Professional Volleyball)
8. LA Clippers
9. Hawai'i Food and Wine
10. Xterra Championships
11. Xterra Trail Run
12. Ironman World Championships
13. Hawai'i International Film Festival
14. Kona Coffee Festival
15. Hawai'i Open Tennis
16. Maui Jim Invitational
17. Hawai'i Bowl
18. Maui Film Festival
19. Diamond Head Classic
20. Sentry Tournament of Champions
21. Sony Open in Hawai'i
22. Mitsubishi Electric Championship
23. Polynesian Football Hall of Fame Game (Polynesian Bowl Game)
24. Pan Pacific Cup (Men's Soccer)
25. Waimea Town Celebration
26. Pana'ewa Stampede Rodeo
27. Sunset Pro
28. Prince Kuhio Celebration
29. Honolulu Festival
30. Celebration of the Arts
31. Honolulu Biennial
32. Merrie Monarch Festival
33. LPGA Lotte Championship
34. MAMO: Maoli Arts Movement
35. Mele Mei & Na Hōkū Hanohano Awards
36. King Kamehameha Day Celebration
37. Pan Pacific Festival



nielsen

HAWAII TOURISM AUTHORITY

2017 - 2018 Event Evaluation Comparison Report

June, 2018

HAWAII TOURISM
AUTHORITY



BACKGROUND & OBJECTIVES

- Nielsen was commissioned by the Hawai'i Tourism Authority (HTA) to conduct quantitative research on key events/festivals (right) throughout 2017-2018 and report the key findings from the analysis back to HTA.
- Nielsen worked with the individual Hawai'i event coordinators prior to each event to discuss overall logistics, expected attendance numbers, etc. Nielsen sent a specific number of staff members to each event to collect attendee contact information via iPads. Nielsen would then follow up with those attendees with an online survey on the event gathering information that ranged from overall event satisfaction and perceptions of Hawai'i to tourist spending and number of nights stayed on the Island.
- Each event report contained key findings from Nielsen's research and analysis across areas such as Economic Impact, Event Satisfaction, Tourism Impact, and Community Impact.

1. Aloha Festivals
2. LA Clippers Hawai'i Classic
3. Ironman World Championship
4. Hawai'i Food & Wine Festival
5. Hawai'i Tennis Open
6. Maui Invitational
7. Tournament of Champions
8. SONY Open
9. Waimea Town Celebration
10. Merrie Monarch Festival
11. LOTTE Championship
12. MAMo – Maoli Arts Movement



Hawai'i Tennis Open



Aloha Festivals



SONY Open

NOTE: Results for the Hawaii Tennis Open & MAMo Maoli Arts Movement are based on locals only, as the sample size for tourists was too small to report on

KEY FINDINGS

Economic Impact

- The Ironman World Championship Event generated the largest economic impact for the state by far at \$41.8 Million, followed by the Tournament of Champions.
- The average night stay for those tourists who came to Hawai'i for an event was 10, which is on par with what we found last year as well.

Event Satisfaction

- The average event satisfaction score across all 2017-2018 events that Nielsen measured on behalf of the Hawai'i Tourism Authority was an 9.0 out 10. The Ironman World Championship received the highest score with a 9.3, while the Waimea Town Celebration and LA Clippers Hawai'i Classic tied for lowest at 8.1.
- However, the LOTTE Championship scored the highest among tourists for being better than expected & MAMO won with locals for being better than expected.

Tourism Impact

- As we have seen in the past, the sporting events & main-stream festivals are more likely to have tourists specifically come to Hawai'i for that event vs. a cultural event. Ironman came out on top, as it has for the past two years running.
- An average of 40% of tourists across all events said their overall experience at the event changed their perception of Hawai'i for the better, a slight decrease from last year's average (43%).

Community Impact

- While locals vary on level of importance of HTA securing events, the 2017 Ironman World Championship saw the highest percentage this year, while the Tournament of Champions was the lowest.
- Locals most strongly agreed the events/festivals made a positive contribution to the image, appearance & reputation of Hawai'i & were visitor friendly. If they caused them an inconvenience at all, the #1 reason was due to traffic.

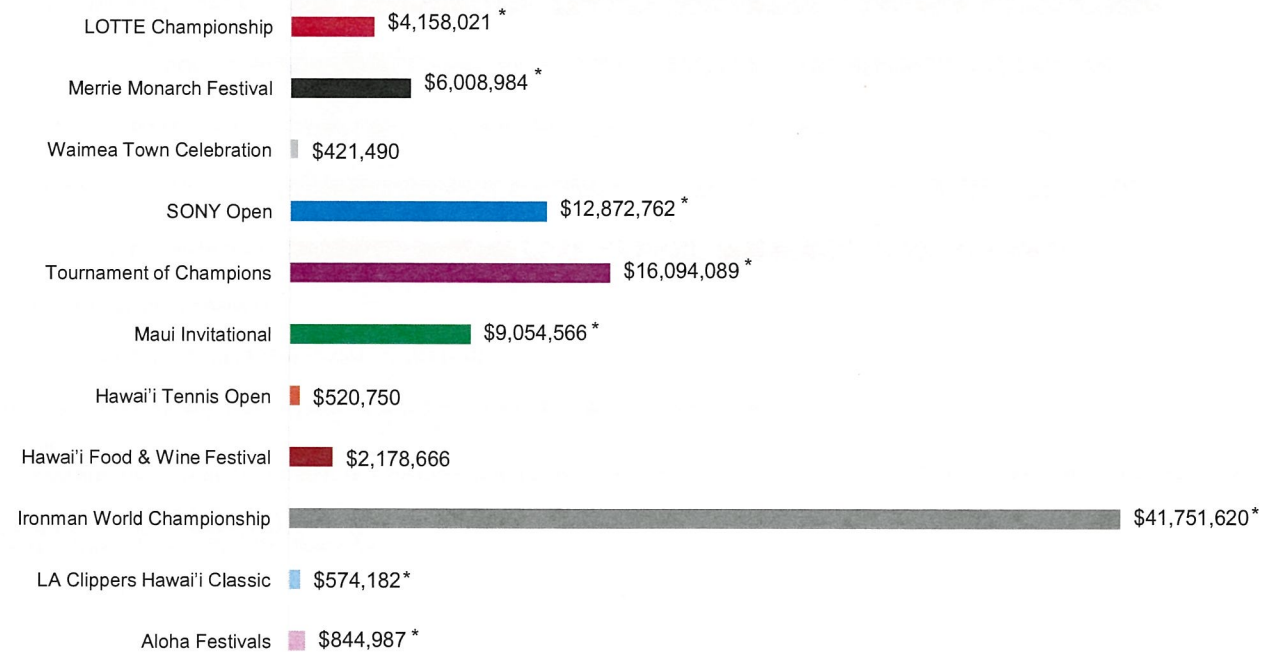
ECONOMIC IMPACT

The Ironman World Championship Event generated the largest economic impact for the state (higher than last year), followed by the Tournament of Champions.

Total direct expenditure into Hawaiian Economy

Total Direct Expenditure into Hawaiian Economy

MAMO – Maoli Arts Movement

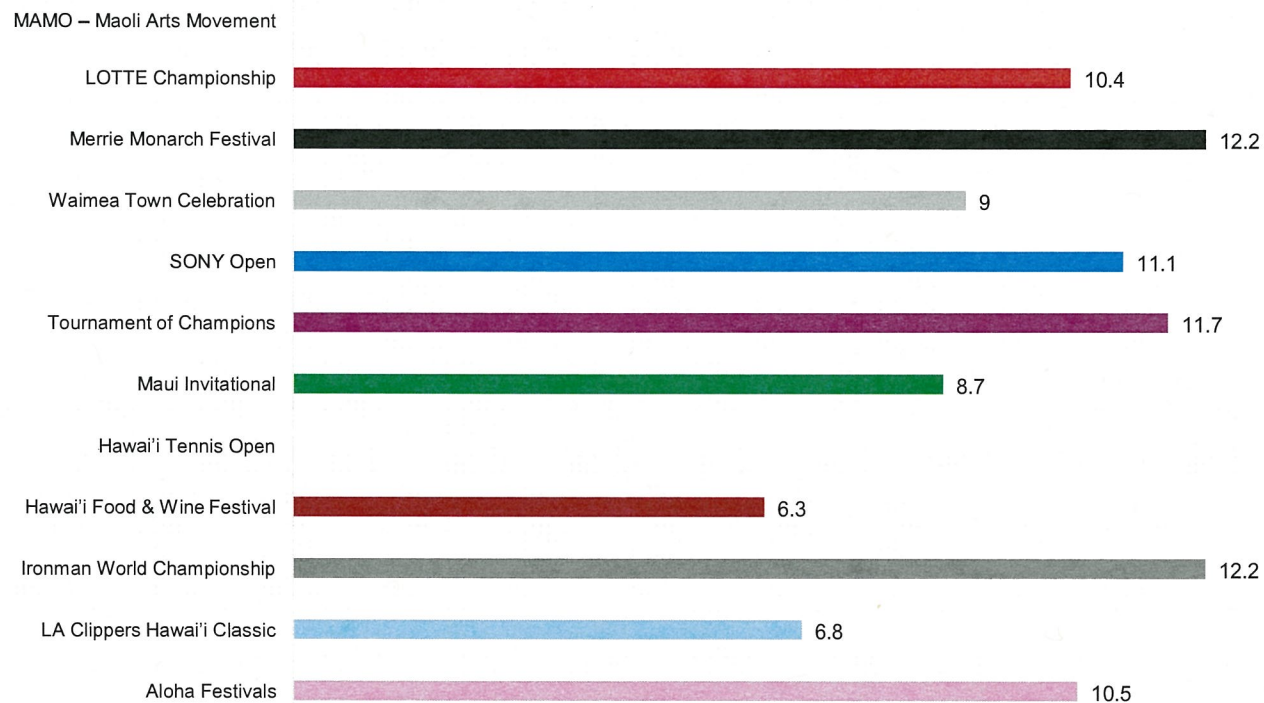


ECONOMIC IMPACT

The average night stay for those tourists who came to Hawai'i for an event was 10, which is on par with what we found last year as well.

Question: How many nights did you spend in Hawai'i during the trip you took for the event? (event – reason for trip)

Nights Spent in Hawai'i (event – reason for trip)



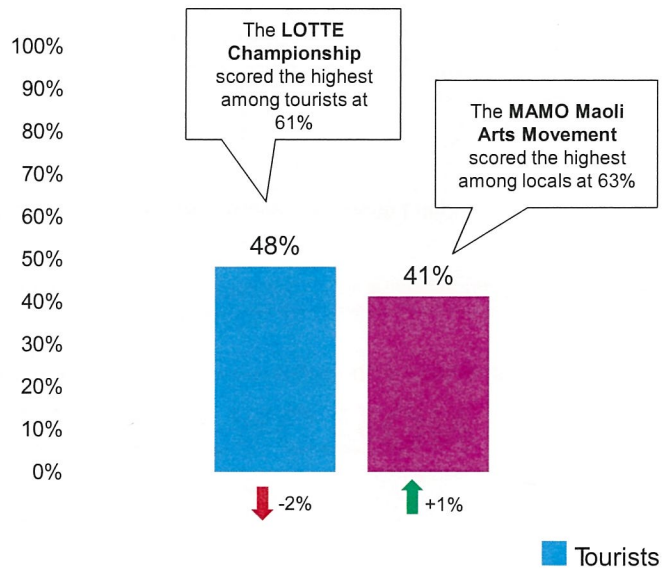
Source: Nielsen/Hawai'i Tourism Authority Custom Research Study, 2017-2018 Events

EVENT SATISFACTION

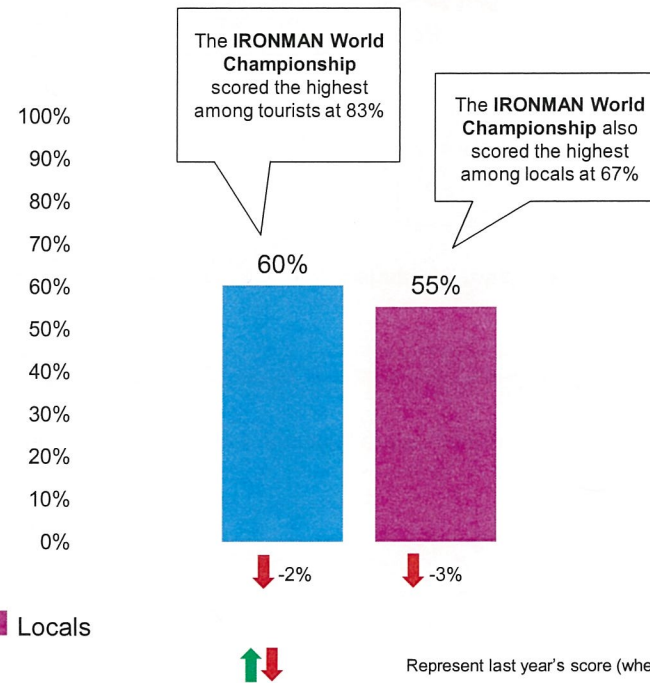
Numbers for expectations and event comparisons were slightly lower than last year, although the mix of analyzed events could have contributed to the variation

Question: Would you say that the overall experience at the event was better than you expected, as you expected or worse than you expected? | Compared to other events you have attended so far this year, how would you rate the event?

Comparisons to Expectations for Event: Better than Expected Event Breakouts on Following Slides



Comparisons to Other Events: Better than other Events Event Breakouts on Following Slides



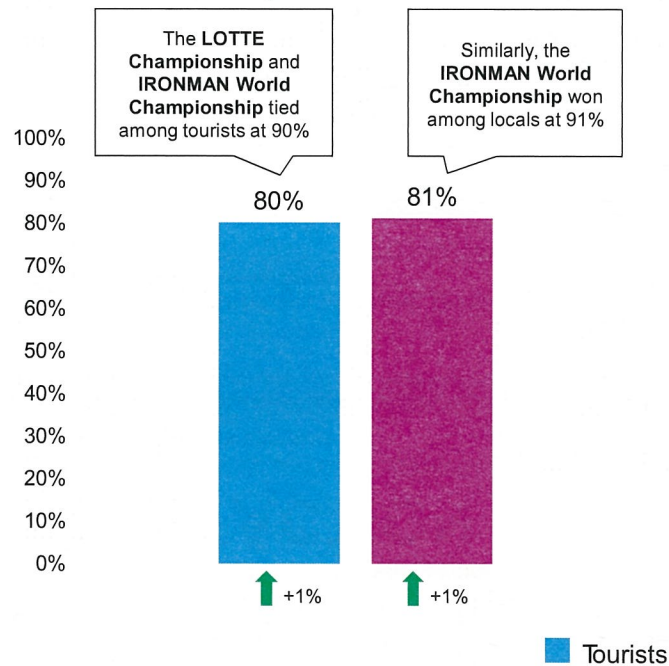
Source: Nielsen/Hawai'i Tourism Authority Custom Research Study, 2017-2018 Events

EVENT SATISFACTION

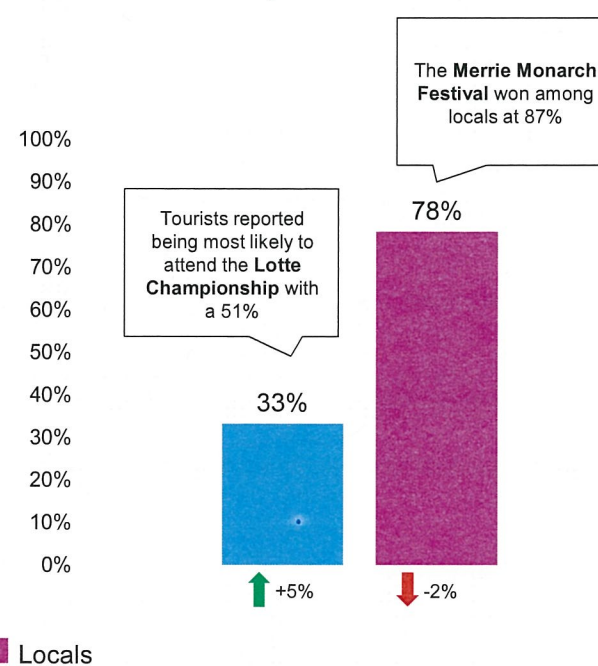
Overall, most results were slightly up in comparison to 2016-2017, with only likelihood of locals attending events next year taking a slight dip

Question: On a scale of 0 to 10, where 0 = Extremely unlikely, to 10 = Extremely likely, please indicate how likely you are to recommend attending this event to your friends and colleagues in the future. | How likely are you to attend next year's event?

Likelihood to Recommend: Extremely Likely
Event Breakouts on Following Slides



Likelihood to Attend Next Year: Definitely/Probably Will Attend
Event Breakouts on Following Slides



Source: Nielsen/Hawai'i Tourism Authority Custom Research Study, 2017-2018 Events

↑ ↓ Represent last year's score (where applicable) 16

TOURISM IMPACT

As we have seen in the past, the sporting events & main-stream festivals are more likely to have tourists specifically come to Hawai'i for that event vs. a cultural event. Ironman came out on top, as it has for the past two years running.

Question: Did you specifically come to Hawai'i on this trip to attend this event? Was attending the event one of the main reasons you decided to come to Hawai'i?

Visitation – Event was a Reason for Trip

MAMO – Maoli Arts Movement

LOTTE Championship 41%

Merrie Monarch Festival 41%

Waimea Town Celebration 2%

SONY Open 20%

Tournament of Champions 32%

Maui Invitational 71%

Hawai'i Tennis Open

Hawai'i Food & Wine Festival 50%

Ironman World Championship 98%

LA Clippers Hawai'i Classic 13%

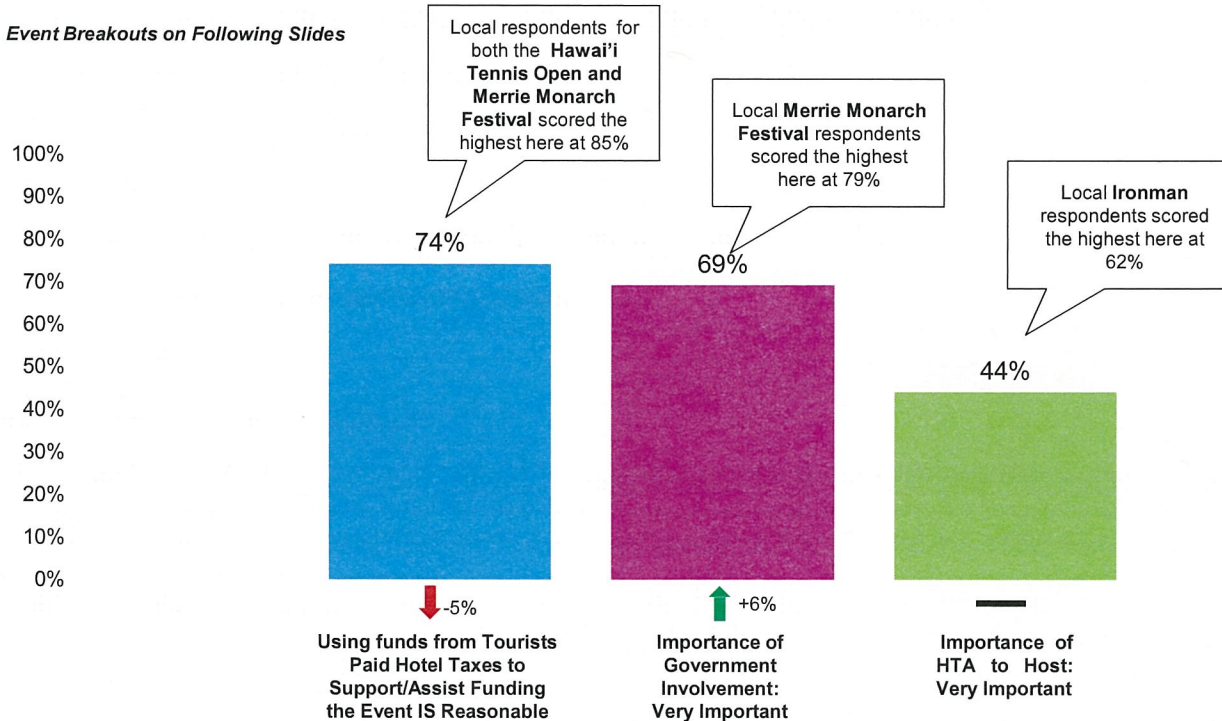
Aloha Festivals 1%

COMMUNITY IMPACT

A slight decrease from last year, 74% of locals feel that it is reasonable to use funds from tourist-paid hotel taxes, while opinions about the importance of the government being involved to secure major events increased to 69%

Question: Do you think using tourist paid hotel taxes to support or assist in funding the event is reasonable? | How important is it for the Hawai'i state & government to be involved in the attracting & securing of major events across the Hawaiian Islands? | How important is it for the Hawai'i Tourism Authority to host this event in any given year?

Event Breakouts on Following Slides



Source: Nielsen/Hawai'i Tourism Authority Custom Research Study, 2017-2018 Events

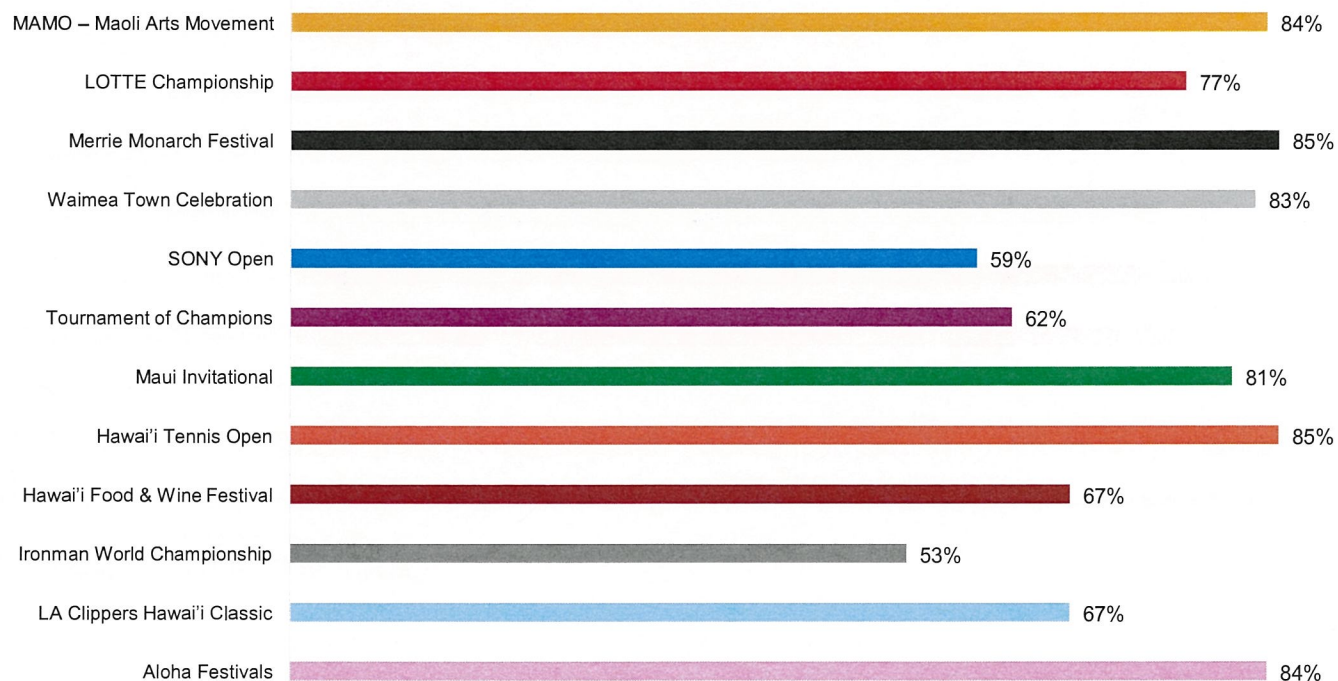
↑↓ Represent last year's score (where applicable) 26

COMMUNITY IMPACT

The majority of locals feel using tourist paid hotel taxes to support or assist in funding events is reasonable, with the Merrie Monarch Festival and Hawai'i Tennis Open scoring the highest at 85%

Question: Do you think using tourist paid hotel taxes to support or assist in funding the event is reasonable?

Using funds from Tourists Paid Hotel Taxes to Support/Assist Funding the Event IS Reasonable

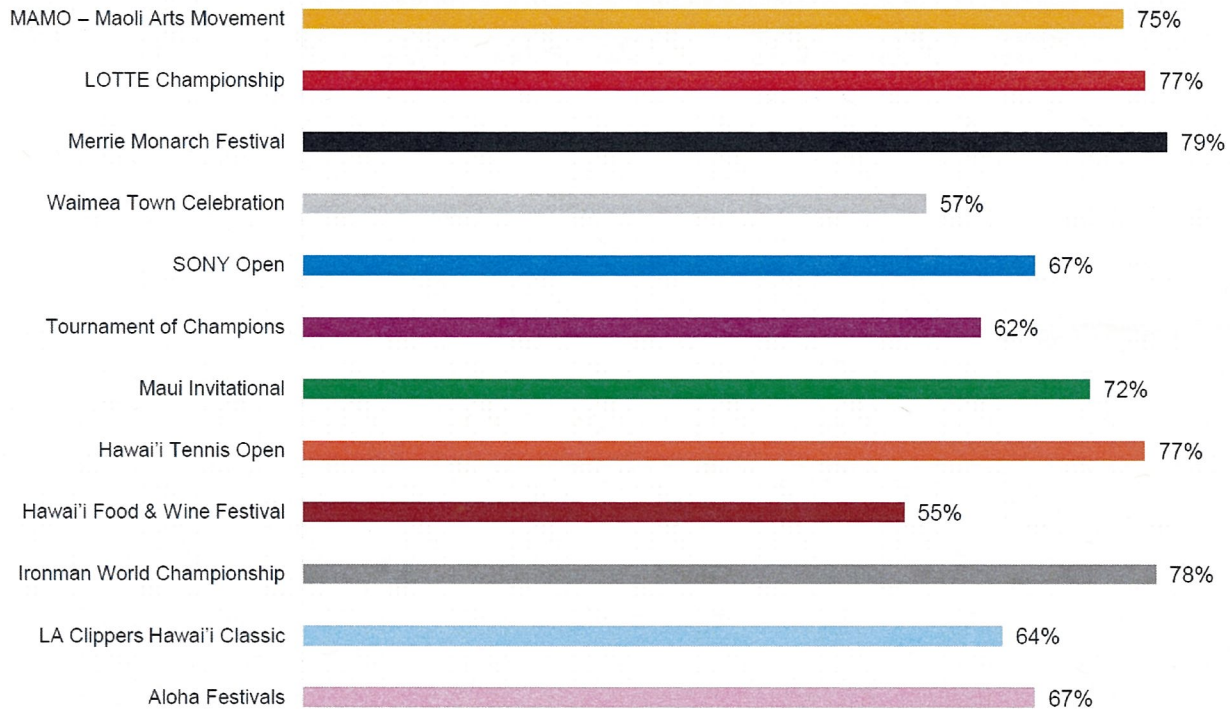


COMMUNITY IMPACT

Most locals feel it's very important for the state & government to be involved in attracting & securing major events across the Islands

Question: How important is it for the Hawai'i state & government to be involved in the attracting & securing of major events across the Hawaiian Islands?

Importance of Government Involvement: Very Important



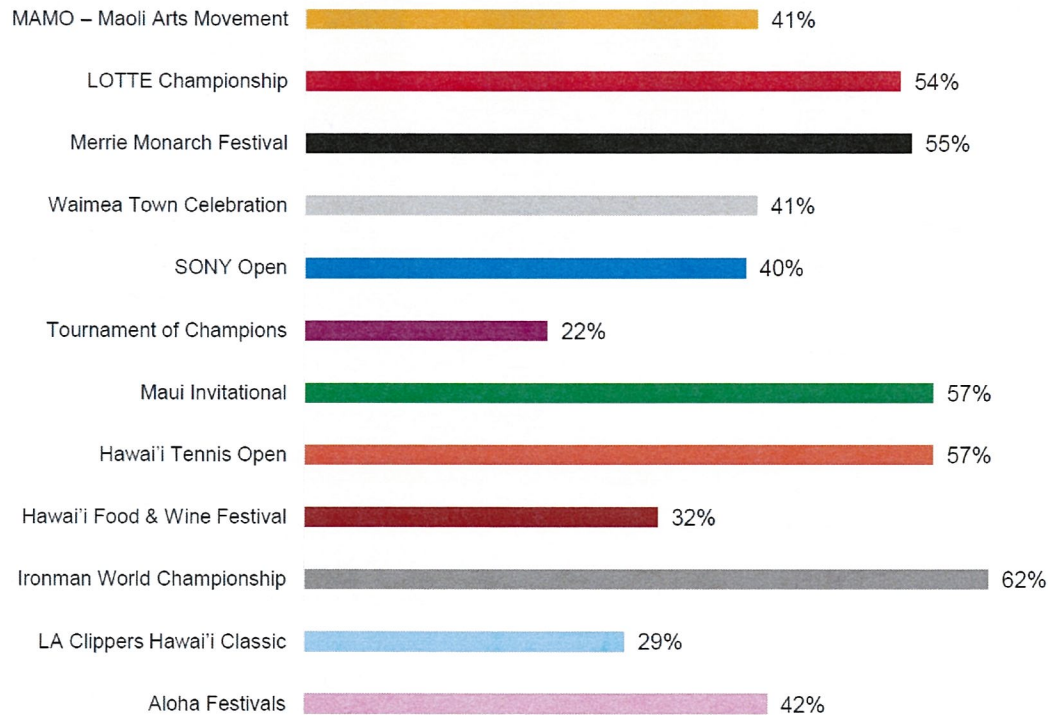
Source: Nielsen/Hawai'i Tourism Authority Custom Research Study, 2017-2018 Events

COMMUNITY IMPACT

Opinions on the importance for HTA to host these events varies, with the Ironman World Championship leading at 62% (similar to leading last year), while the Tournament of Champions scored only 22%

Question: How important is it for the Hawai'i Tourism Authority to host this event in any given year?

Importance of HTA to Host: Very Important

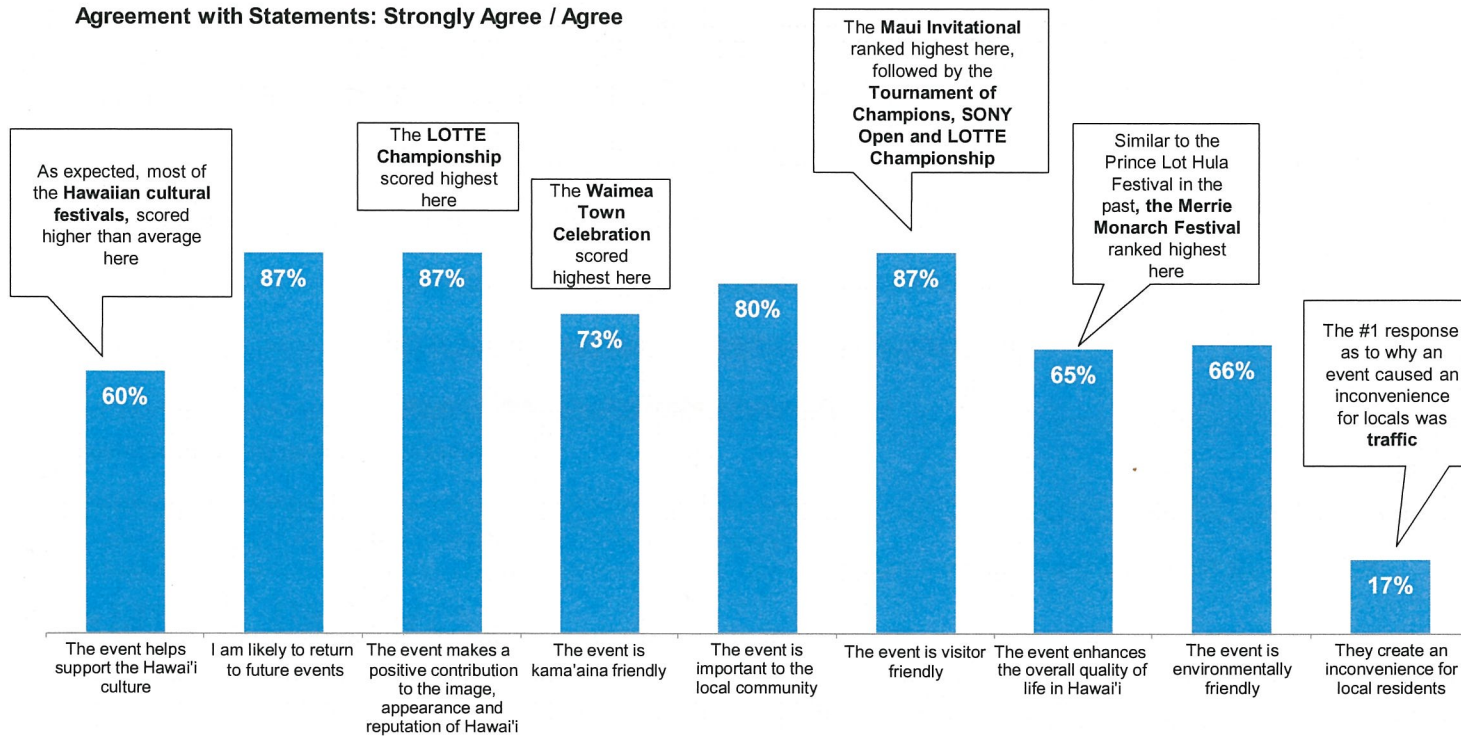


COMMUNITY IMPACT

Locals most strongly agreed the events/festivals made a positive contribution to the image, appearance & reputation of Hawai'i & were visitor friendly.

Question: Please indicate your agreement with the following statements regarding the event

Agreement with Statements: Strongly Agree / Agree





ASCENDENT

HTA SPONSORSHIP IMPACT REPORT

FEBRUARY 23, 2018



METHODOLOGY

RESEARCH OBJECTIVE – Understand the impact of the HTA's sponsorships on one of its top target markets, the mainland US.

SAMPLE SPECS:

TWO WAVES OF RESEARCH

SAMPLE SIZE = WAVE 1: 2,000 Gen Pop, WAVE 2: 1,999 Gen Pop + Augment of 150 in LA DMA*

SAMPLE DESCRIPTION = NATIONWIDE GEN POP (MAINLAND), CENSUS BALANCED

SAMPLE SOURCE: *innovate*

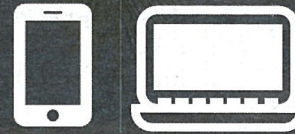
WAVE 1 PROPERTIES:

IRONMAN WORLD CHAMPIONSHIPS, XTERRA WORLD CHAMPIONSHIPS, MAUI JIM MAUI INVITATIONAL, HAWAII OPEN

WAVE 2 PROPERTIES:

LA CLIPPERS*, HONOLULU MARATHON, HAWAII BOWL, SENTRY TOURNAMENT OF CHAMPIONS, SONY OPEN

WEB-BASED SURVEY (MOBILE & DESKTOP)



AVG. COMPLETION TIME = 10 MIN.



FIELDDED:

WAVE 1: NOV. 29 – DEC. 5, 2017

WAVE 2: JAN. 17 – JAN. 25, 2018

TOPICS INCLUDED:



TRAVEL IMPACT (HAWAII)



HAWAII ATTRIBUTES



TRAVEL PLAN IMPACT (HAWAII)



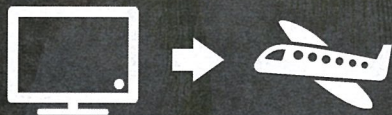
IMPACT ON HTA FAVORABILITY



EVENT INTEREST PROJECTIONS

*All properties are analyzed within the universe of Nationwide Gen Pop (Mainland), except the L.A. Clippers which are analyzed within the L.A. DMA.

KEY INSIGHTS



Watching HTA events on TV have a significant impact on desire to travel to Hawai'i.



The Sony Open and the Hawai'i Open have the largest projected event attendee potential*.



Hawai'i is perceived as more accessible by those who watch events in Hawai'i on TV.



HTA's partnerships positively impact fans on the perception of Hawai'i as prestigious and accessible.



Of all HTA partnerships, The Clippers has the highest percentage of viewers who say they plan to visit Hawai'i in the next few years.

*Assuming that college football and basketball interest is impacted by team selection

RESEARCH REPORT KEY

KEY METRICS DEFINITIONS:



TRAVEL IMPACT:

The average of the four travel metrics below:



DESIRE TO TRAVEL IMPACT:

'Very interested' or 'interested' in visiting Hawai'i among those who regularly watch the event on TV.



IMPACT ON HAWAI'I ACCESSIBILITY:

Selected 'accessible' as a description for Hawai'i among those who regularly watch the event on TV.



IMPACT ON HAWAI'I PRESTIGE:

Selected 'prestigious' as a description for Hawai'i among those who regularly watch the event on TV.



TRAVEL PLAN IMPACT:

Selected Hawai'i as a destination they are planning to travel to in the next three years among those who regularly watch the event on TV.



PARTNERSHIP PERCEPTION:

Think "much more" or "somewhat more" favorably of the HTA because of the partnership among fans of the event.



ATTENDANCE INTEREST:

"Very interested" or "interested" in attending the event among fans of the sport.

KEY METRIC SCORES

Are shown as numbers on a scales from '1' to '10' where '1' represents low performance and '10' represents high performance.

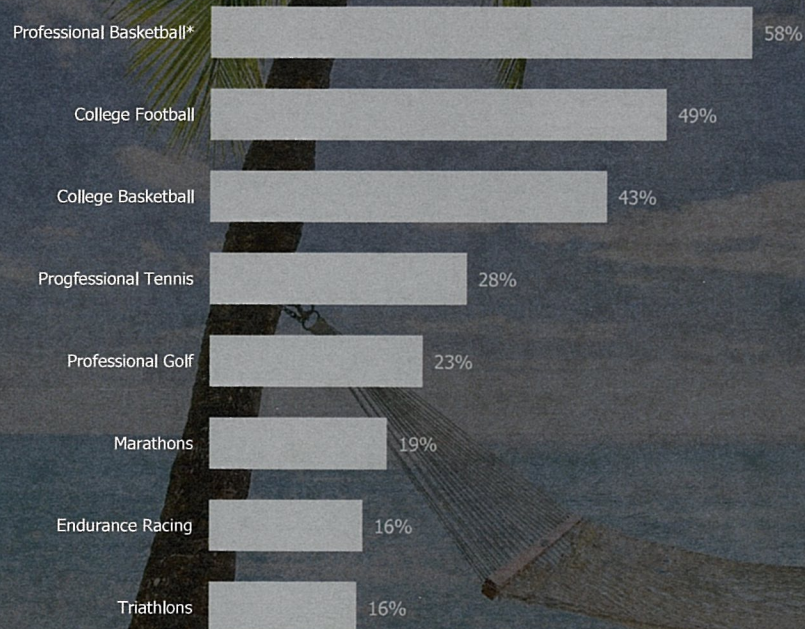
There is also a detailed performance indicator scorecard where all metrics are shown as an index score*.

All 1 – 10 scores and index scores were computed within event type (i.e. marquee events are comparable and signature events are comparable).

*Index = (Event % / Average % for event (marquee or signature) * 100

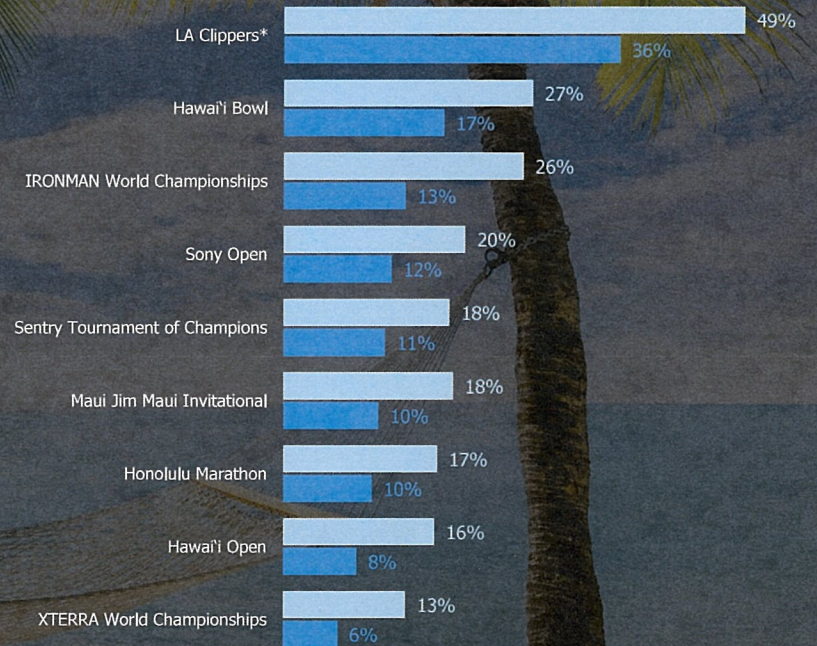
SPORT & EVENT FAN STATUS – ANALYSIS GROUPS

Based on 'T2B' = 'Passionate' or 'Average' Fans of each Sport



'T2B' = 'Passionate' or 'Average' Fans of Event

'T2B' = Watched 'All the time' or 'Frequently' in the past three years



*Professional Basketball and L.A. Clippers shown based on the L.A. DMA, not U.S.

Key Metrics Scorecard



HIGH

LOW



OVERALL TRAVEL IMPACT



PARTNERSHIP PERCEPTION



ATTENDANCE INTEREST

	OVERALL TRAVEL IMPACT	PARTNERSHIP PERCEPTION	ATTENDANCE INTEREST
MARQUEE EVENTS			
IRONMAN World Championships	5.1	5.0	7.4
LA Clippers	6.1	5.0	N/A*
Sony Open	5.1	5.9	5.3
Sentry Tournament of Champions	5.2	6.0	4.0
AVERAGE % POINT LIFT ABOVE MAINLAND US RESIDENTS FOR MARQUEE EVENTS			
	+15	+32	+33
SIGNATURE EVENTS			
Honolulu Marathon	5.9	6.4	8.8
Hawai'i Open	6.1	5.8	5.0
XTERRA World Championships	6.5	4.6	4.7
Hawai'i Bowl	4.2	5.7	6.0
Maui Jim Maui Invitational	4.9	5.0	3.5
AVERAGE % POINT LIFT ABOVE MAINLAND US RESIDENTS FOR SIGNATURE EVENTS			
	+16	+34	+24

*LA Clippers 'Attendance Interest' is not shown/computed since it is based on an LA event.

Detailed Key Performance Indicators - Indices



TRAVEL DRIVERS:



DESIRE TO TRAVEL IMPACT



IMPACT ON ACCESSIBILITY



IMPACT ON PRESTIGE



TRAVEL PLAN IMPACT



BRAND FAVORABILITY



INTEREST IN ATTENDANCE



HIGH



LOW

		DESIRE TO TRAVEL IMPACT	IMPACT ON ACCESSIBILITY	IMPACT ON PRESTIGE	TRAVEL PLAN IMPACT	BRAND FAVORABILITY	INTEREST IN ATTENDANCE
MARQUEE EVENTS	IRONMAN World Championships	103	91	93	98	95	117
	LA Clippers	99	113	93	117	95	NA
	Sony Open	99	87	103	95	103	98
	Sentry Tournament of Champions	99	100	103	88	105	87
	AVERAGE % POINT LIFT ABOVE MAINLAND US RESIDENTS FOR MARQUEE EVENTS		+16	+12	+13	+19	+32
SIGNATURE EVENTS	Honolulu Marathon	101	100	110	102	108	130
	Hawai'i Open	98	123	97	105	103	95
	XTERRA World Championships	105	118	107	107	92	93
	Hawai'i Bowl	98	77	93	84	102	105
	Maui Jim Maui Invitational	100	82	97	100	95	82
AVERAGE % POINT LIFT ABOVE MAINLAND US RESIDENTS FOR SIGNATURE EVENTS		+17	+11	+13	+21	+34	+24

SMG INSIGHTS/YOU.GOV

Destination Index

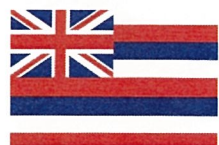




Hawai'i is the top international holiday destination for LA Rams fans

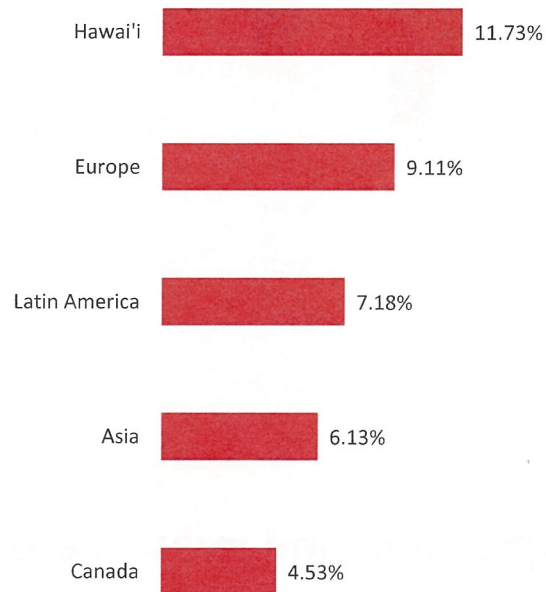


4.59 MILLION
RAMS FANS
NATIONALLY

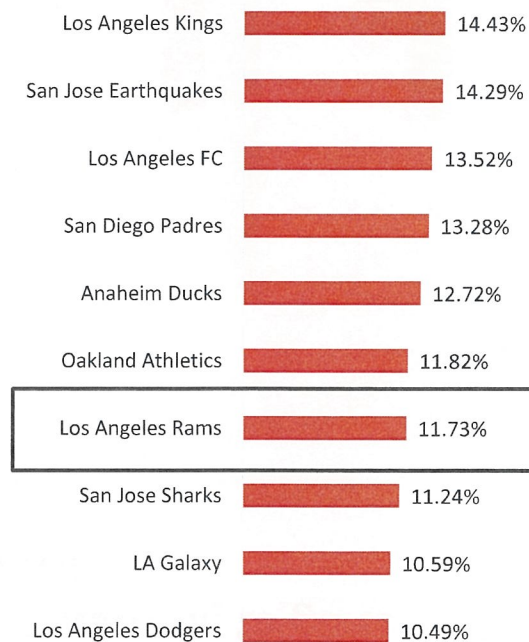


538 THOUSAND
FANS WANT TO VISIT
HAWAI'I NEXT

Rams Fans' Top International Holiday Destinations – Top 5



Hawai'i Destination Among All California Based Teams – Top 10

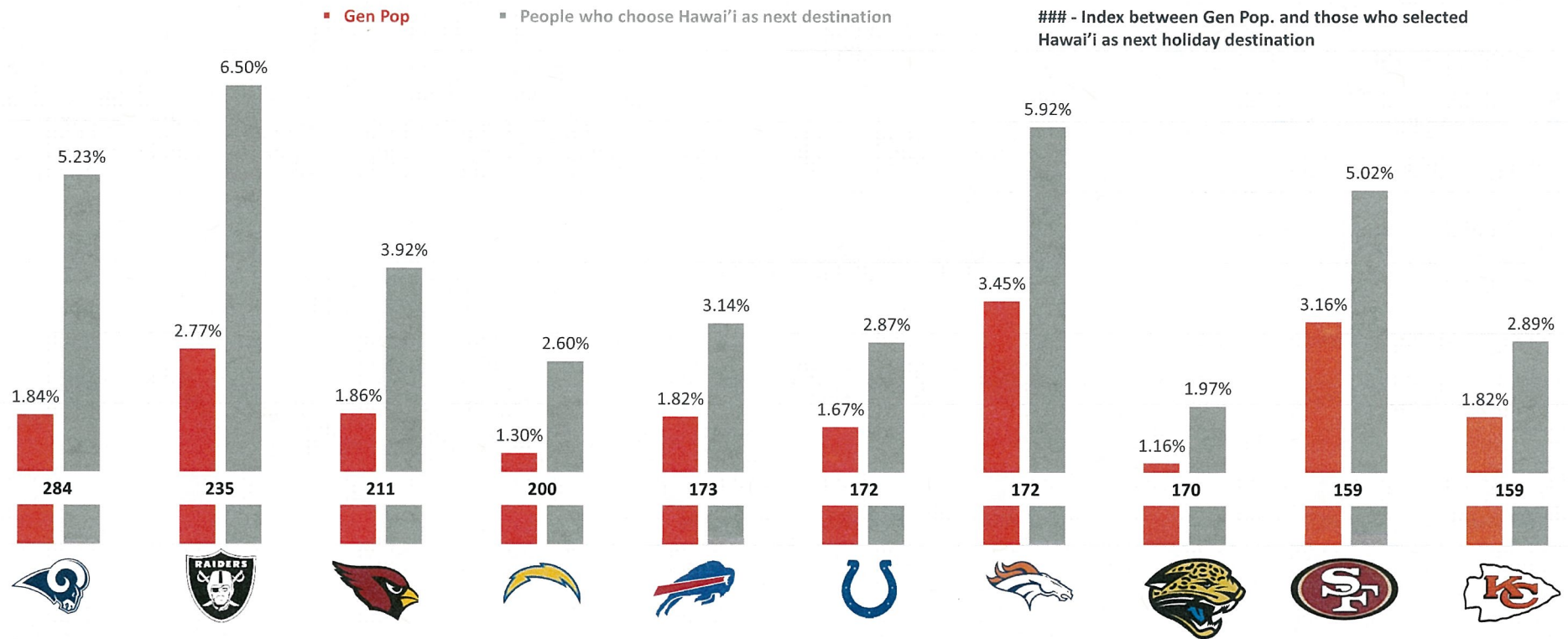


Source: YouGov 2018, Profiles 7.29.2018 Dataset.

Note: Team Fan definition – self identified league fans being asked a question on which team they support (chose multiple).

Q. Which, if any, of the following destinations best describe your next leisure trip destination? If you are planning a trip that takes in multiple destinations please answer for the furthest destination you plan to visit.

While the Rams rank 10th overall in NFL team popularity among those wanting to go to Hawai'i, the team over-indexes against the general population the most



MAHALO!

HAWAII TOURISM
AUTHORITY

