



**BRANDING STANDING COMMITTEE MEETING  
HAWAII TOURISM AUTHORITY  
Tuesday, July 23, 2024, at 2:30 p.m.**

**Virtual Meeting**

**MINUTES OF THE BRANDING STANDING COMMITTEE MEETING**

<b>MEMBERS PRESENT:</b>	Blaine Miyasato (Chair), David Arakawa (Zoom), Roy Pfund (Zoom), Mufi Hannemann
<b>MEMBER NOT PRESENT:</b>	Kimberly Agas
<b>HTA STAFF PRESENT:</b>	Kalani Ka'anā'anā, Isaac Choy, Jadie Goo, Ilihia Gionson, Maka Casson-Fisher, Iwalani Kūali'i Kaho'ohanohano, Jennifer Bastiaanse
<b>GUESTS:</b>	Jeffrey Eslinger, Kara Imai, Lynn Whitehead

**1. Call to Order**

Chair Miyasato called the meeting to order at 2:38 p.m.

**2. Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic**

Mr. Gionson did the roll call, and members were confirmed in attendance by themselves.

**3. Opening Protocol**

Mr. Casson-Fisher did the opening cultural protocol.

**4. Approval of Minutes of the June 20, 2024 Branding Standing Committee Meeting**

Mr. Hannemann made a motion to approve the minutes, and Mr. Arakawa seconded with the assumption that the minutes would include the amendments he made in the July 22,

2024, Administrative and Audit Committee meeting minutes. Mr. Gionson did the roll call, and the motion carried with Mr. Arakawa's reservations.

**5. Presentation and/or Discussion Regarding an Update on the Meetings, Conventions and Incentives Market Activity and Pace Report, and Hawai'i Convention Center Activity and Local Sales**

Ms. Whitehead commended everyone for the great work and time that they gave to the state of Hawai'i. She said Meet Hawai'i is a collaboration of the Hawai'i Visitors and Convention Bureau (HVCB) and Hawai'i Convention Center (HCC) to reinforce the brand of the Hawaiian Islands as a world-class destination for business meetings, conventions, and incentive programs.

Ms. Whitehead and Ms. Orton meet weekly. The sales teams meet to go over what is on the books and strategize toward the right business for the building. The client services team and event management team continually collaborate. The Citywide sales team is responsible for booking offshore programs 13 months after arrival, and the local sales team is focused on booking groups within 13 months. The client services team focuses on the destination components and putting together the entire program. The event management team at the HCC is responsible for everything inside the building. The single property team is responsible for booking hotel meetings on all islands. Ms. Whitehead spoke about the follow-up from the last meeting. Chair Hannemann and Mr. Arakawa offered some suggestions during the call. Both FESTPAC and Okinawan Festival are local events, and Ms. Whitehead and Ms. Orton had a call after the meeting to do a deeper dive into how they could respond to those questions. She reached out to Andrew Koh, the leader of the Oceania team. For FESTPAC, Chair Hannemann wanted to see what they could do to take advantage of the momentum generated from FESTPAC. The focus will be on Australia and New Zealand. Chris oversees Oceania and is working with some media to put that in front of the customers to see how they can generate some excitement for Hawai'i.

Mr. Arakawa had suggested how they could try to get more attendance at the Okinawan Festival. Mr. Andrew Bailey and Mr. Haichia, the country manager for Japan, are working on an MOU with the Japan Travel Bureau. It was suggested that we see what can be done in the MOU to create and drive more attendance for all festivals in the building.

She spoke about the Economic Impact that Meet Hawai'i and the MCI business represents. Economic Impact: 2022 (awaiting 2023 data in August)

- Offshore events generate \$808 B in total meeting attendee expenditures for the state of Hawai'i.
- Meet Hawai'i's citywide/single property teams generated \$452.2 M (56%) of the total

meeting attendee expenditures.

MCI offshore business is a significant driver of Hawai'i's economy:

- Higher spending, distributes spending to all islands, creates compression which drives higher ADR, Pre/Post stays

MCI Business sales and marketing process is unique:

- Sales: Longer sales cycle, complexity and customization, decision-making process.
- Marketing: Content and messaging, targeted digital media, industry relations and strategic partnerships, commitment to sustainability and DEI.

The MCI business always gets back to the community.

She shared the opportunity they have in MCI business. The industry estimates continued growth, with MCI doubling in 10 years since 2021. There is a lot of opportunity.

She spoke about industry market trends in the last presentation from the previous month:

- In the next four years, the incentive segment is expected to be the fastest growing segment in the market, segmented by service type, at a CAGR of 9.3% from 2023 to 2028.
- Sales lead volume - up +18.8% in Q1 2024 over Q1 2019; Tentative room nights and attendance are also up over 2019.
- Planner optimism continues to grow. Over 60% of planners are reporting they will plan more meetings in 2024 than they did in 2023.
- Rising costs remain the planners' top concern.
- International attendees, especially Japanese, are more likely to participate in CSR/Community Give Back Programs.

As they move away from the pandemic, MCI is gaining momentum.

Because of the incentive market and the importance it has for Meet Hawai'i and the growth they will see over the next four years, Meet Hawai'i is:

- Developing a digital messaging strategy targeting incentive groups for all islands
- Q2 production is soft due to signings pushed into Q3.
- Short-term booking cycle will continue into 2025 for citywide and single-property events.
- Allocating incentive dollars to secure key citywide and single property event
- Focused attention on Definite 2024/2025 citywide groups to ensure maximum rotation potential for future years.

She spoke about strategic focus initiatives:

- Enhance incentive program for both single property and citywide to direct need time

frames, push short-term opportunities now, and remain competitive.

- Refine sales strategy with key corporate, incentive houses and third parties to ensure Hawai'i is at the top of the mind.
- Strengthen partnerships with stakeholders to support and secure key industry events in Hawai'i.
- Increase communication from the Meet Hawai'i team with key on-island community stakeholders.
- Update and implement revised operational guidelines for the client services team.
- Reinforce the benefits of Meet Hawai'i groups to the local community, especially with our 'Elele program.

She spoke about Citywide sales production. It has been a flat year to date for definite room nights. From a tentative perspective, they are a bit behind, but she expects to see an increase with the new sellers on board. She spoke about their tentative bookings. They have 36 tentatives, and 55% of those tentatives are 2024 - 2028. 44% are in 2027 and 2028. They are taking advantage of the short-term booking cycle. They just got two verbal definites for 2027 and 2030 that she looks forward to reporting in Q3. It represents 23,000 room nights and \$67 million in economic impact. She spoke about Hawai'i's future pace for Citywide, focusing on definite room nights. She presented the changes from the previous meeting. The previous month, they had a collaborative call with the HTA, and they took the slide from a three-year average target to a five-year average target. She spoke about the slide. In 2027 and 2029, there are a lot of tentative opportunities they are working on. She said they will fall short if they do not continue to book into specific years. 2030 is doing well now but if they do not stay on top of that, they will not stay on pace for the year. For 2026, they will not add any more business due to the construction. In 2024 and 2025, they will have a strong representation of business for local and definite groups. The mix of groups makes the building and destination a success.

For single property production, there was a strong definite room night. For July, they had 15,000 total room nights, representing about \$68 million in economic impact.

Ms. Marykay Lui, the regional director of single property sales, is getting the West Coast sales up and running and will help increase the funnel. She showed a snapshot of the pace of the single property. They were moved to a five-year target. It increased the benchmark slightly. For 2024, they have work and will probably not meet the benchmark. 2025 is looking strong. The reason for doing a three-year in this presentation is due to the single property booking cycle being around 18 months. The tentative room night represented for single property production by the island will not match production as the leads might go to different islands. They always highlight Maui and say that they are open. The North American

sales team and Asia/Oceania have been out in the marketplace, focusing on financial insurance groups for education summits. She highlighted Trevor Newman, who came from the local sales team on Ms. Orton's team and is now deployed in the Bay Area and active in the International Associations of Exhibit and Events (IAEE). He was identified as a future leader with them. The Asia/Oceania team has had several initiatives, such as ITB Asia Shanghai, HIS Corporate Fam, etc.

As they close out the half year, they are at about 47,000 attendees, 107,000 definite room nights, and the economic impact is around \$256 million. There is a lot of work to do, and they are fully deployed to make that happen. She is looking forward to seeing those numbers grow. She will be presenting quarterly. She reminded everyone that it is a collaboration and that if anyone has initiatives or questions about MCI or Meet Hawai'i they must reach out, and she will follow up. Mr. Pfund mentioned a typo on the slide for the 2022 economic impact. He said it should be \$1 million. He agreed about the importance of the MCI market to Hawai'i. He asked about consolidation in the MCI operators with JTB and CNHA doing worldwide marketing. Ms. Whitehead said she would resource Mr. Andrew Bailey and the Asia Oceania team before answering Mr. Pfund's question.

She thanked Mr. Pfund for the typo comment. Chair Miyasato said it was great that Ms. Whitehead took notes, questions, and answers from the previous meeting and brought them through to this meeting. Mr. Arakawa spoke about an event or a festival of people coming home for every community and if they have looked into that to create economic energy and opportunity. Ms. Whitehead said he had brought that point up in the last Branding Standing Committee meeting, and that is what she was addressing during this session. She spoke about the rotation of that and driving it every five years for more attendance. The initiative she took away was how they can drive attendance to the festivals they are already hosting in the building, but they can go back to the drawing table to see if they can try other items. Mr. Arakawa agreed to drive more people to the building for events. He asked if there is a way to calculate the economic impact of local events, buying from local farmers, hiring local people for business, etc.

Ms. Whitehead said the local groups are Ms. Orton's expertise, and they will always generate room nights but at a different level. For music events, for example, some dollars are associated with tracking those metrics for groups like that, so dollars would be needed. In the sports markets, HVCB added Play Easy, a tool to track room nights for their sports groups. They could use that for other groups but only track room nights. She would look at the costs involved. Mr. Arakawa said that he and Ms. Agas had previously asked for the dollar amounts in prior years because the legislature would like to see the numbers in progression, even the numbers going back to 2013. He mentioned that Ms. Whitehead has 5

fewer employees and \$2 million less in the budget, so if they want the numbers, they must put more into the process. Ms. Whitehead asked for the report Mr. Arakawa would like her to mirror. She said the pay slide is looking forward.

Mr. Arakawa asked if they have target goals for room nights, events, and economic impact and if they could create a slide on that. Ms. Whiteheads said they have a goal for room nights and book events, but not for economic impact, but they report on it. She said that could be added. Chair Miyasato said the committee meetings are to get into the fiscal conversations, but it has to be foundational and supported by the plan, vision, message, etc. He asked that Ms. Whitehead give them the tools and the data to help make good decisions and recommendations for the committee. He said it's important for residents to feel good about tourism and the economic benefits, and it is in the community. He said to put on the agenda for the next meeting that Mr. Arakawa's idea will be used as a proxy for how they can do other programs every three to four years.

Ms. Whitehead said that while the MCI business is lumped into visitors, part of its role is to educate the community on what the MCI business delivers. The MCI programs as groups bring in 5,000 attendees and are dedicated to booking destinations committed to DEI sustainability and attracting the right business. They are busy working on their DMAP measurements and making them more meaningful. Their priority is to ensure they can report more and provide more press and PR towards those groups to share that with the community. The MCI is dedicated to the key core pillars of the HTA. Chair Miyasato followed up on Mr. Arakawa's suggestion and said that whatever they can report quarterly can provide a data set that makes the point. She said if there is an opportunity for her to collaborate with them before the next quarterly report, she will welcome that.

Mr. Ka'anā'anā said the other tools they had previously needed to be brought back. In FY2026, they requested it, but they did not do it for MCI, they have a contractor Vision Insights who did an economic and community impact survey on the large sports events, so that helps give a bigger picture. They asked for money to bring the reports back, but they should look at expanding that to MCI events, especially for Citywide events to capture the full picture, so it could be a shared cost. Chair Miyasato said after the meeting they must find a starting point and decide on the different "buckets". Mr. Arakawa said they must remember DBEDT. Mr. Hannemann said he would like to see the sporting opportunity in future reports. Part of the Destination Stewardship responsibilities is to get local teams involved in playing against national and international competition in Hawai'i. Ms. Whitehead will pull the relevant information into the report. Mr. Pfund suggested reaching out to the Hawaii Captives Insurance Council as they have an annual function in Hawai'i where all the executives tied to national and international insurance companies meet. This is a great

opportunity to reach out to them. Ms. Whitehead said Ms. Kathy Dever, director of sales of the mid-west region, has a great presence with the financial groups. One of the initiatives she attended was the financial insurance conference, an excellent market for the state of Hawai'i. She will research the event Mr. Pfund brought up.

## **6. Presentation and/or Discussion on Global Support Services for Brand Management and Marketing**

Mr. Pfund commented on the reporting. It would be very helpful if there was some way to capture all the information and data. Ms. Whitehead said that is why they are bringing the DBEDT report into the process. The statistics show the value of each piece of business, considering all the different components of the attendees when they are attending a convention.

Chair Miyasato said they need to find the perfect mix and the sweet spot, and the data will help determine that, as it is not just for room nights. Ms. Whitehead said the groups must be involved in give-back programs to the islands so that there is an offset in some way. She said that when she went to Hawai'i, she was impressed with the evaluation process for the groups. She said they always ensure they incentivize the groups and give back in some way to the community.

Ms. Imai said the support services are the contracts that cover all the marketing tools the partners utilize, i.e., all the island chapters, the MMAs, the tools, and all the services. Some tools are the GoHawaii website, the knowledge bank, market insights, and airline route development. She said that Kainoa Daines has hired a new team member to support him with destination education. Mr. Keenan Chung, however, is going to be pursuing movie and TV opportunities.

She gave the floor to Mr. Eslinger. Mr. Eslinger said they need to keep the partners aware and educate them with the data needed to make meaningful decisions for their organizations. On the market insights side, he said this could not be done without the hard work of Ms. Chun and the DBEDT team and the HTA resources available to make actionable insights from the data they have access to. They are trying to put out the information for the inner GMTs and HTA leadership, stakeholders within the state, and the continents. They are looking at visitor trends, market profiles, and segmentation. They are using different data sets to do that. They are also leveraging the third-party data in some Ms. Chun's reports. Then, they create a monthly market insights deck in the office to share with the internal stakeholders and all their partners. They are always reactive and responsive to all questions. They also do presentations, whether with GMTs or MCI partners.

He said Ms. Chun and her team will release the 2023 annual report at the end of August or early September. They will take the most recent year-end data and create visual snapshots of what they will call the Hawai'i visitor profile. They will also look at the GMTs that the HTA is currently funding.

Air route development needs to be revised. Their goal is to keep what they have. They have additional seats on some routes that may be oversaturated, and other routes need more. So, it is balancing out the effort. With their funding, they are putting together a strategy and doing some communication, but to have a comprehensive air route development program, they would need additional resources and the coordination of other partners within the state. What they are currently doing on the air route side is using a tool that gives them air service grids they do on a monthly basis that they provide to all the GMTs and the area sales teams they can use as talking points. They do air service grids and a seven-day moving average. They are synthesizing it and making it more user-friendly for the end user. For daily seats into Hawai'i by Origin Country is done on a weekly basis.

They continue to collaborate with the airlines and continue to foster strong relationships with airlines through regular meetings with their network planning, revenue, marketing, and international development teams. Industry Engagement is where they actively participate in industry events like World Routes and Routes Americas to stay updated on industry trends and connect with potential airline partners. What has happened to Maui is very important to them. As part of the contract, he said they had engaged Brad Defiore from Ailevon Pacific, who is working with them on a small strategy component and looking at three major areas of their air situation. The most important is the Maui recovery. The second one is looking at long-haul markets. There are some holes in the international markets. Those conversations will happen with Brad's team and the DBEDT international team. Getting Taiwan service back would be important, too. The third thing is to determine the impacts or potential impacts of the integration of Hawaiian and Alaska Airlines into the state and see how that would look from an origin-destination perspective moving forward. By providing these critical reports and fostering industry relationships, our Air Route Development team ensures informed decision-making for attracting new air routes and optimizing existing ones.

Ms. Imai said the HTA Knowledge Bank is a digital asset management system. There are two sections. One for the public and one for the internal platform that only the HTA partners have access to. Ms. Susie Kim is the Director of Content Development and manages the knowledge bank. She is responsible for processing all the images that come through and adding metadata to them. She has been putting together a wish list for all the different islands for the past few months. Going hand in hand with that is the Hawaiian Island brand guideline responsibilities. There are two parts to that. The Hawaiian Islands Social Media Brand Guidelines and Ma'ema'e Hawai'i style & resource toolkit provide support to the HTA



team. They work hand in hand. They are in the process of updating the brand guidelines and are trying to brainstorm if there is a better way to get this information out to users or combine them to get them online, etc. The most important thing is to portray Hawai'i accurately. She spoke about social media support services.

The HTA social tools support and training:

Podio – HTA social communication hub

Sprout Social – social asset management

TINT – UGC management

She spoke about the websites and the apps:

Miles Partnership manages and hosts gohawaii.com. CMS training is available.

GMTs have access to make minor updates on their MMA version of gohawaii.com.

Wrike system to request major updates.

She spoke about the GoHawaii app. All the updates and content will be updated more efficiently across all channels.

Chair Miyasato said that as they fine tune the process it will go faster, and they can leverage all the strengths.

Mr. Ka'anā'anā added that Kilohana is responsible for working on a scoping document for Chair Quinlan. Part of that is the situational piece to understand the GoHawaii app, its capabilities, and what could be added. Some of the groundwork will happen on the Kilohana side.

Chair Miyasato said their committee is the best one for finding the right path. In the end, it should be one app, not multiple apps. Mr. Ka'anā'anā said the app will go out for bid and implementation. He reminded everyone that they are always working together as staff, so it will ultimately be the HTA's product. Chair Miyasato said that practically speaking avoids any confusion. He said they need to categorize everything to look at it across the board.

## **7. Presentation, Discussion, and Action on Proposed Fiscal Year 2026 and 2027 Hawai'i Tourism Authority Operating Budget for Branding and Marketing (BED114) (01:16:12)**

Chair Miyasato deferred the item.

## **8. Adjournment**

Mr. Hannemann made a motion to adjourn the meeting, and Mr. Arakawa seconded. The meeting was adjourned at 3:55 p.m.

Respectfully submitted,

A handwritten signature in cursive script that reads "Sheillane Reyes".

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Sheillane Reyes  
Recorder