




SPRING TOURISM UPDATE

Lee Conching
VP Meet Hawaii - Citywide



OVERVIEW- MARKET CONDITIONS

- US economy continues to be strong with unemployment at record low
- Lower room blocks for citywide and higher room rates
- Anti-USA sentiments because of visa restrictions
- Higher cost in airfare, shipping and time out of office

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- Growing competition for West rotation
 - Attendees booking outside housing block (25%-60%)
 - Growth in vacation rentals including Domio and Niido – short term rental apartments
 - Amazon and Google anticipated to enter travel industry in 2019
 - *Choice Hotels became the first hotel company in the U.S. to partner with Google Assistant to launch voice-enabled hotel bookings on the Google mobile app.*

PACE REPORT

THE TAP REPORT

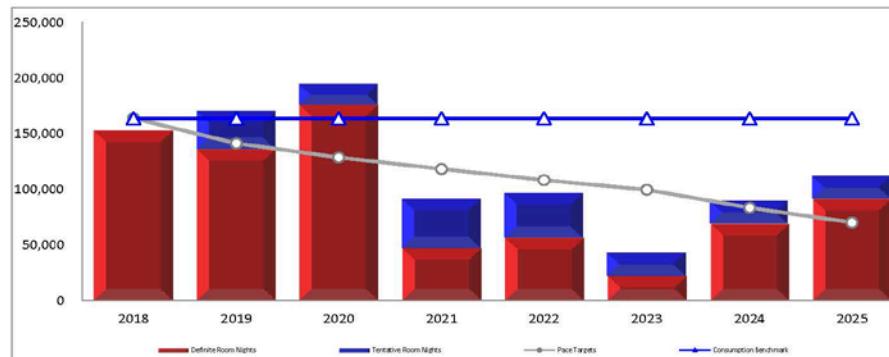
Hawaii
Convention Center

Period Ending December 31, 2018
Report Date: January 7, 2019

Hawaii R/N	2018	2019	2020	2021	2022	2023	2024	2025	TOTAL
Definite Room Nights	152,386	135,874	175,932	46,931	56,026	21,939	68,759	91,055	748,902
Pace Targets	163,670	141,247	128,488	118,131	108,115	99,555	83,263	70,109	912,578
Variance	(11,284)	(5,373)	47,444	(71,200)	(52,089)	(77,616)	(14,504)	20,946	(163,676)
Consumption Benchmark	163,670	163,670	163,670	163,670	163,670	163,670	163,670	163,670	1,309,360
Pace Percentage	93%	96%	137%	40%	52%	22%	83%	130%	82%
Total Demand Room Nights	354,887	336,404	295,545	204,446	173,226	62,465	80,001	116,955	1,623,929
Lost Room Nights	202,501	200,530	119,613	157,515	117,200	40,526	11,242	25,900	875,027
Conversion Percentage	43%	40%	60%	23%	32%	35%	86%	78%	46%
Tentative Room Nights	0	34,430	18,405	44,596	40,626	20,940	20,940	20,940	200,877

Hawaii Events

Definite Events	24	22	14	4	6	3	5	5	83
Pace Targets	27	19	14	11	10	9	4	2	96
Variance	(3)	3	0	(7)	(4)	(6)	1	3	(13)
Consumption Benchmark	27	27	27	27	27	27	27	27	216
Pace Percentage	89%	116%	100%	36%	60%	33%	125%	250%	86%
Total Demand Events	55	55	37	21	17	10	7	7	209
Lost Events	31	33	23	17	11	7	2	2	126
Conversion Percentage	44%	40%	38%	19%	35%	30%	71%	71%	40%
Tentative Events	0	12	6	10	7	6	8	5	54



PACE - Jan 19

13 of 22

Lost Business

Of the 17 groups
g 157,515 room
65% due to rate.

Of the 11 groups
g 117,200 room
72% due to rate.

Of the 7 groups
g 40,526 room
68% due to rate.



RESPONSIBLE TOURISM

- LEED Gold Certification
- Hawaiian Legacy Reforestation initiative

HO'OMALUŌ VIDEO

- <https://www.youtube.com/watch?v=zd9u1qTlrWY>



HAWAII
CONVENTION CENTER
Where Business and Aloha Meet

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HAWAII CONVENTION CENTER ONE MILLION TREES VIDEO

https://www.youtube.com/watch?v=GnQMhi_mBuA

PACIFIC FUTSAL CUP 2018





ATHLETIC COURTS VIDEO

<https://www.youtube.com/watch?v=cdcjsmU-s2A>



SHORT-TERM OPPORTUNITIES

- Lei Day promotion in market - Chicago and Washington DC in May
- ICESAP and PCMA
- Focus on medical and scientific meetings
- Hawaii 365 – Rotary International 2020 – Attendance Promotion, Hamburg Germany