



MCI UPDATE

HTA BOARD MEETING

NOVEMBER 18, 2021

MCI VALUE

- In 2019, MCI visitors (Convention/Conference, Corporate Meeting and Incentive) contributed \$218.4 in PPPD\$ compared to \$183.3 for Pleasure visitors.
- MCI Delegates spend more, are high value visitors, and have lower environmental and community impacts.
- Use Established Accommodations – Stay in hotel/resort properties and not alternative short-term rentals.
- Represent "Mindful and Respectful Travelers" who are part of a structured event. Utilize group transportation, schedule is programmed and participate in community-based Corporate Social Responsibility programs.
- Delegates attend to share experiences and expertise, positively benefits the local business, professional, and academic communities via exchange of information
- Widespread economic benefits dollar impacts in staging, transportation, technology, destination services, etc. Ensures more economic benefit to our community
- Future tourism opportunities– MCI segment brings people who visited for meeting but can comeback for future leisure visits.

MCI HISTORY – POST COVID

- January 1, 2020 -- HVCB awarded Global MCI responsibilities for Single Property and Citywide Sales and Marketing
- March 2020 COVID-19 -- April 2020 shutdown
- April 2020 -- May 2021 Structured Events Stopped
- May 2020 -- Loss of HTA funding, MCI contract reduced by 60+%
- September 2020 -- Single Property Team absorbed Citywide sales account management
- February 2021 -- Funding began to be partially restored:
 - February 2021 hired Senior Director, Citywide Sales /Corporate Market
 - September 2021 hired Senior Director, Citywide Sales / Associations Eastern
 - October 2021 hired Senior Director Citywide Sales / Associations Midwest

FULLY DEPLOYED SALES TEAM

Citywide Team



Ernie Garcia
Corporate



Adrienne Nudo
Association
West, Mountain, Midwest



Lynn Whitehead
Association
East

Single Property Team



Adele Tasaka
Corporate & Association
West, Mountain



Kathy Dever
Corporate & Association
Midwest



Meredith Parkins
Corporate & Association
East

U.S. TRAVEL FORECAST

NOVEMBER 15, 2021

- U.S. Travel Association released its biannual forecast which shows an uneven recovery for the international inbound and business travel segments, while domestic leisure travel has returned to near pre-pandemic levels.
- This analysis, projects that domestic leisure travel in the near term, will continue to support the U.S. travel industry's recovery. The leisure segment is projected to surpass pre-pandemic levels in 2022 and into the future.
- Domestic business travel spending is forecasted to reach 76% of 2019 levels in 2022 however, the segment is not expected to fully recover until 2024.
- Spending by International inbound travel is forecasted to reach 72% of 2019 levels in 2022. The international market is not expected to fully recover until 2024 or 2025.

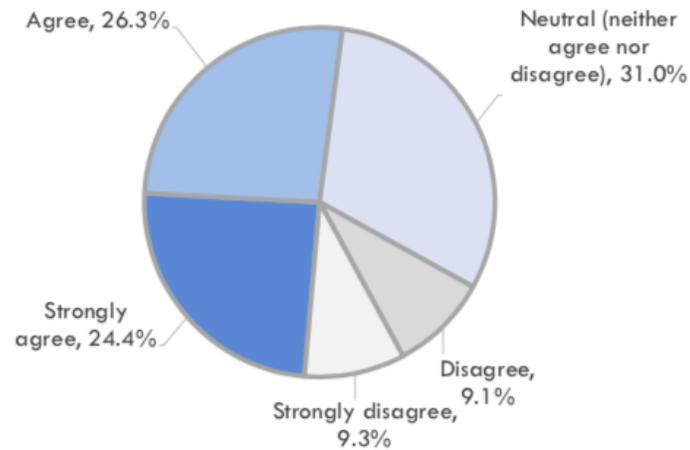
CONVENTION AND CONFERENCE SENTIMENT

FIELDED NOVEMBER 10-12, 2021

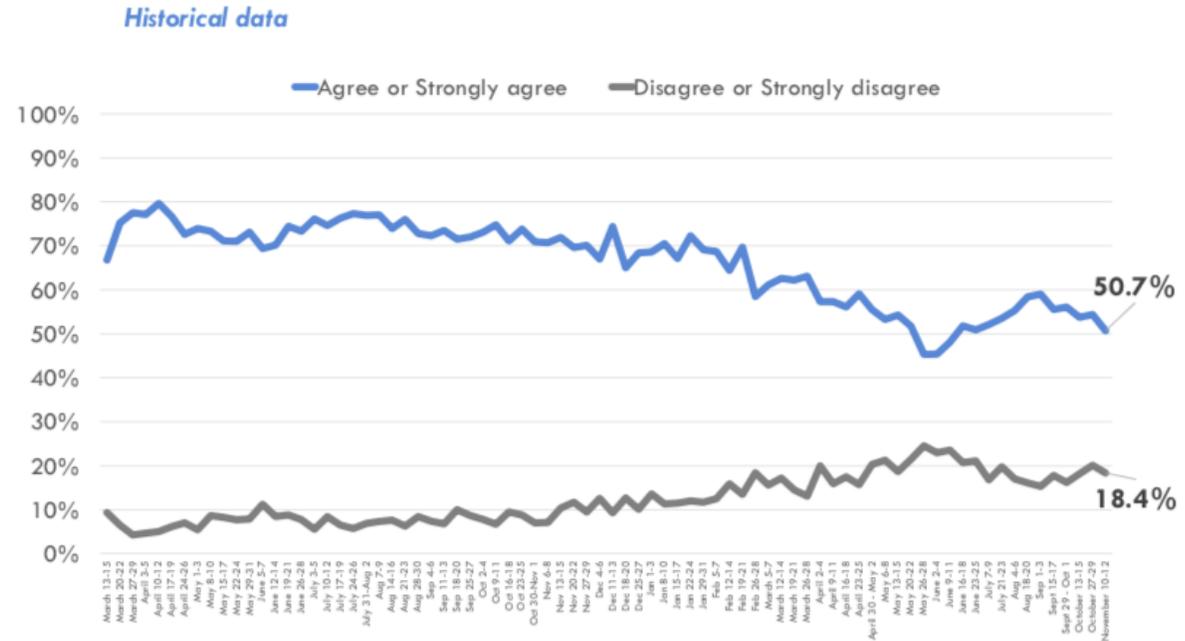
AVOIDING CONVENTIONS & CONFERENCES

How much do you agree with the following statement?

Statement: I will be unlikely to attend any conferences or conventions until the coronavirus situation is resolved.



(Base: Waves 1-78. All respondents, 1,200+ completed surveys each wave.)



IMEX 2021 – LAS VEGAS

HEARTBEAT OF THE GLOBAL BUSINESS EVENT COMMUNITY

10,000+ attendees

4,200 decision makers

3,500 exhibitors

155 countries

Hawai'i Partners:

27 hotel properties

5 DMC/Amenity/Attraction/Transportation

687 total partner and Meet Hawai'i sales appointments

100 Meet Hawai'i sales leads



IMEX 2021 HAWAII BOOTH



IMEX 2021 HAWAII BOOTH



IMEX 2021 CLIENT SIGNING CITYWIDE CONTRACT



Kevin Johnson, Executive Director of the Geochemical Society, finalized his hotel block with Courtney Conching of Highgate Hotels at this year's IMEX.

The Goldschmidt Conference will be in O'ahu next summer. Participants are earth scientists from leading universities, research institutes, government agencies, and private companies. Half of attendees typically come from outside North America. Approximately 25% of attendees are undergraduate and graduate students.

- Citywide
- 2,500 delegates
- 5,100 room nights
- Estimated \$18M Economic Impact

CITYWIDE CANCELLATIONS DUE TO COVID-19 PANDEMIC

Group	Attendees	Total Room Nights	Economic Impact	Rebook
CHI 2020 Conference	3,000	4,167	\$19,656,230	Yes, 2024
IMMUNOLOGY 2020	3,300	7,395	\$18,655,635	Yes, 2025
Jump Dance Convention 2020	40	110	\$166,828	Yes, 2022
Fraternal Association	18,000	52,383	\$104,532,826	Yes, 2027
Varsity Spirit Championships 2020	759	292	\$2,499,120	No
Goldschmidt Conference 2020	3,500	5,100	\$18,412,255	Yes, 2022
Sports Group	1,200	885	\$6,058,473	No
AVID 2020	500	350	\$1,736,249	No
NALC 2020 Biennial Convention	6,500	27,040	\$49,441,767	No
PRiME 2020 Meeting	3,000	8,335	\$22,819,277	No
2020 ARVO Pacific Rim	1,200	1,600	\$5,159,141	No
AAP 106th Annual Meeting	3,700	8,220	\$22,025,563	No
ISESS 2020 4th Annual Meeting	250	575	\$865,467	No
IFEBP 2020 Convention	7,000	40,400	\$45,004,277	No
Pac Futsal Tournament 2020	1,050	1,800	\$4,956,884	No
2020 International Chemical Congress of Pacific Basin Societies	12,000	48,916	\$106,014,965	Yes, 2021

CITYWIDE CANCELLATIONS DUE TO COVID-19 PANDEMIC

Group	Attendees	Total Room Nights	Economic Impact	Rebook
2021 TCT Meetings	4,500	9,678	\$36,089,183	No
Bioelectromagnetics Society - BioEM 2021	350	2,100	\$1,504,749	No
INCOSE 2021 Symposium	1,200	1,910	\$7,639,497	Yes, 2023
2021 CEC/ICMC Biennial Conference	700	1,407	\$4,333,713	Yes, 2023
Medical Association	1,700	5,320	\$8,209,471	Yes, 2024
Pac Futsal Tournament 2021	1,050	1,850	\$4,956,884	No
2023 Y's Men International Convention	1,000	1,825	\$3,947,957	No
Engineering Association	4,500	6,842	\$24,927,580	Yes, 2029
Total	79,999	238,500	\$519,613,991	

MCI CUSTOMER RESTRICTION CONCERNS

Continued impact of COVID-19 Restrictions

- There is confusion on where or if Hawai'i is really open for meetings business.
- Customers voice their lack of trust and confidence in executing MCI events in Hawai'i based on history of changed opening dates and restrictions.
- MCI customers want an official statement regarding structured events. There continues to be confusion on where structured events fit within recent restriction updates on social gathering and social distancing updates at the County and State level.

MCI CUSTOMER CONFUSION

Meet Hawai'i Grid

State of Hawai'i COVID-19 MCI Guidelines	Kaua'i	O'ahu	Maui (Maui, Moloka'i, Lāna'i)	Island of Hawai'i
Safe Travels Hawai'i – Statewide Arrival Program	Statewide Program - https://hawaicovid19.com/travel/ Required for only domestic travelers from the U.S. to Hawai'i – through November 30 Beginning November 8, direct international flights to Hawai'i will align with CDC federal international requirements			
Are Structured (Professionally Organized) Events Allowed?	✓ Indoor Limit – 40 people Outdoor Limit – 100 people	✓ 11/3 Changes Indoor Seated – 100% venue capacity Indoor Interactive – 50% venue capacity; 150 max (11/24 – 300 max) Outdoor Interactive – 50% venue capacity; 500 max (11/24 – no limit)	✓ Outdoor Events Only – Larger than 50 people must consult Mayor's Office	✓ Limit to 50 people, including staff
If Structured (Professionally Organized) Events Allowed – Is There a Request Process?	YES* *County Submission Required if Exceeding Above Limits	YES County Exemption Required	YES County Exemption Required	YES County Exemption Required
Proof of Full Vaccination Required to Enter Restaurants/Bars		✓ Safe Access O'ahu	✓ Safer Outside	
Social Distancing Limitations – Maintain six-feet of physical separation from other persons	✓	✓	✓	✓
Social Gathering Limitations	✓ 10 indoors/25 outdoors	✓ 10 indoors/25 outdoors	✓ 10 indoors/25 outdoors	✓ 10 indoors/25 outdoors
Face Coverings – Indoors/Enclosed Areas	✓	✓	✓	✓
Face Coverings – Outdoor Areas				✓ In crowds (10+ individuals)

CITYWIDE CANCELLATIONS DUE TO HAWAII COVID-19 RESTRICTIONS

Group	Attendees	Total Room Nights	Economic Impact	Rebook
2021 Franchise Corporation	2,200	7,110	\$15,824,673	Yes, 2023
2021 International Chemical Congress of Pacific Basin Societies	4,000	24,566	\$33,732,845	Yes, 2026
2022 Ocean Sciences Meeting	5,000	16,690	\$28,487,646	Yes, 2027
AAO 2022 Annual Session	17,000	21,375	\$87,143,182	No
TOTAL	28,200	69,741	\$165,188,346	

MCI events are going to destinations that allow structured events to happen with minimal restrictions (Las Vegas, Orlando, Texas).

POTENTIAL NEAR-TERM CITYWIDE LOSSES

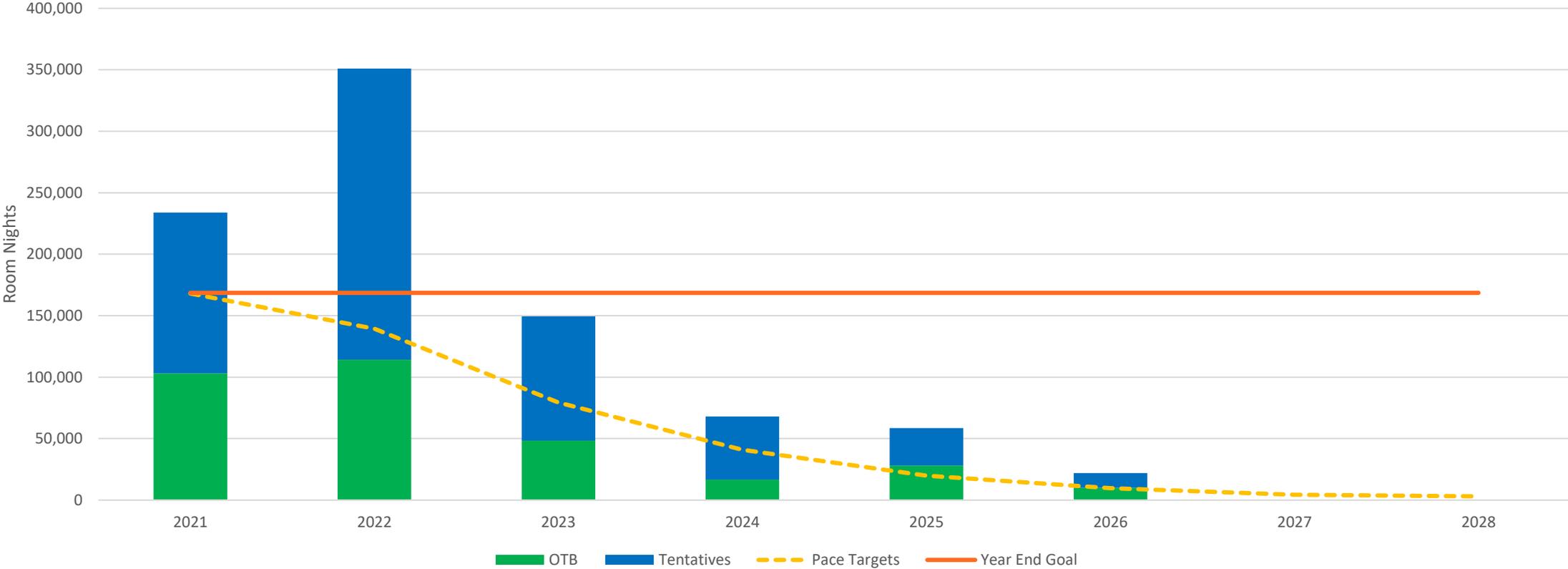
Group	Attendees	Total Room Nights	Economic Impact
Franchise Corporation January 2022	2,200	5,330	\$13,429,710
Educational Association March 2022	3,200	3,655	\$15,080,566
Total	5,400	8,985	\$28,510,276

MCI CUSTOMER RESTRICTION CONCERNS

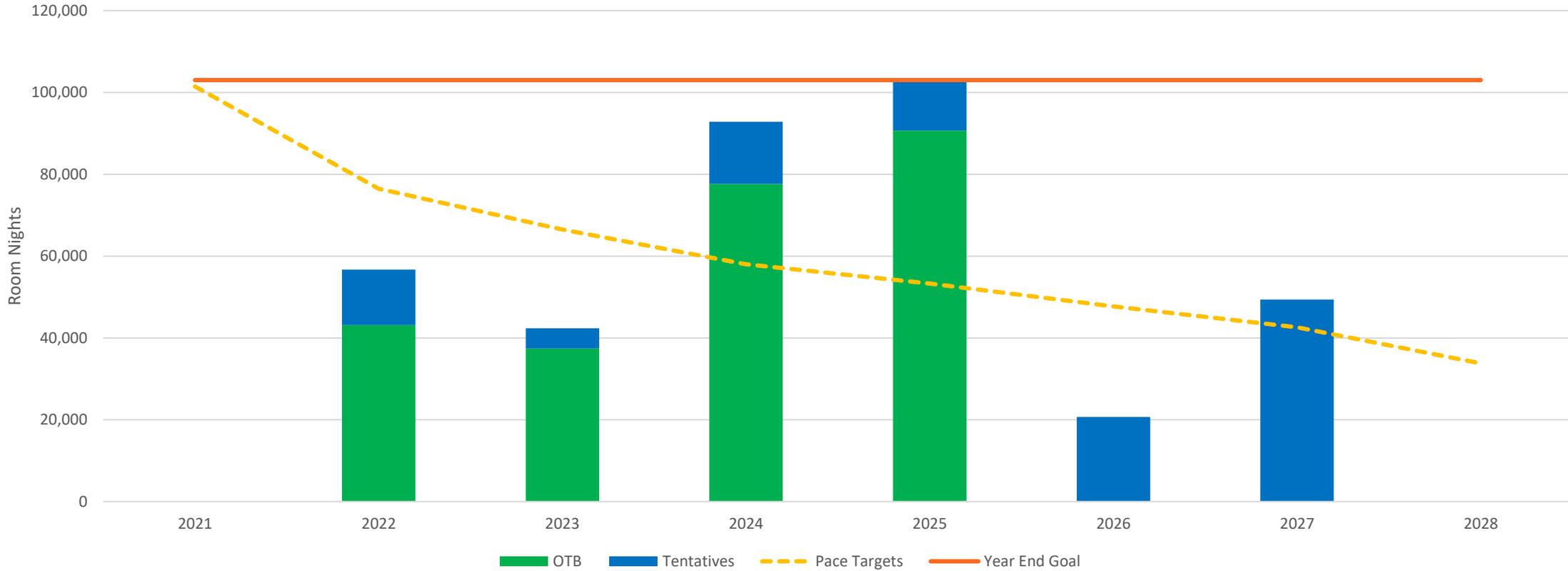
Citywide Customer Quote – March 2022 Event /3,000 attendees

*...“But I did not want any more time to pass without sharing the trigger date as requested. After some discussion with my Executive Director and reviewing our current deadlines in place for speakers to further financially commit to attending, we have determined that we will need to know no later than **December 10** if the state of Hawai‘i will provide capacity exemptions that will allow us to move forward. While it is not ideal to cancel 3 months before an event of this size, we aren’t comfortable waiting longer than that in ‘hopes’ the Governor officially lifts the capacity limit of max 300.”*

SINGLE PROPERTY 8-YEAR PACE



CITYWIDE 8-YEAR PACE



MAHALO
