

Global MCI Market Update

Lynn Whitehead

*Vice President, Global MCI Sales & Marketing
Hawai'i Visitors & Convention Bureau*

2026 Spring Tourism Update





Agenda

- Meet Hawai'i
- Market Conditions
- Trends and Hawai'i Positioning
- Competitive Response
- Q1/Q2 Activations and Partnerships
- Marketing and Communications

Meet Hawai'i

Meet Hawai'i** is a collaboration between Hawai'i Visitors & Convention Bureau (HVCB) and the Hawai'i Convention Center (HCC) to **attract and secure Meetings, Conventions, and Incentive (MCI) business to the state of Hawai'i

HVCB – MCI Global Sales & Marketing for State of Hawai'i

- **Contracts offshore conventions at HCC**
 - Outside of 13 months of arrival
 - Multi-hotel, high room night programs
- **Contracts hotel meetings** across all islands
- **Services and connects** groups to partners across the destination

HCC – Local Sales & Operations

- Contracts **local groups** within 13 months of arrival
- Includes festivals, marathons, sports groups
- **Connects** groups to in-building services (F&B, Audio Visual, Telecom, etc.)



Center Operations,
Local Sales &
Community Events



City-wide Events &
Single Property
Meetings

Market Conditions – Global & Domestic

Global (Asia/Oceania Focus)



Global Environment

- Geo-political uncertainty impacting long-haul travel
- Slower decision timelines, increased risk sensitivity
- Continued demand for face-to-face engagement

Planner Priorities

- Safety and security top priority (78.9%)
- Preference for stable, trusted destinations
- Increased focus on ROI and attendee experience

Competitive Landscape

- Strong competition from global convention destinations
- Increased incentives and international attendance-building

Domestic (U.S.)



Market Environment

- Continued meeting activity across U.S. Destinations
- Strong competition from convention centers on continent

Planner Priorities

- More selective site decisions
- Focus on cost, accessibility, and value

Competitive Reality

- Many destinations fully operational and aggressively pursuing citywide business
- Hawai'i competing for share within strong domestic pipeline

*Sources: FCM Meetings & Events, PCMA, U.S. Travel

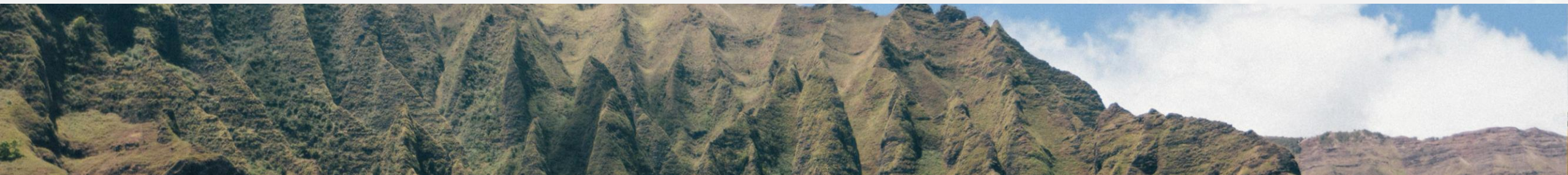
Market Trends & Hawai'i Positioning

Safe Destination (Trend: Safety-Driven Decision Making)

- Hawai'i ranked among the safest destinations globally, reinforcing planner confidence.
- Safety increasingly drives site selection for incentive, international, and medical meetings where duty-of-care and spousal travel matter most.
- Strong global brand and attendee experience for single property meetings

Standing Out (Trend: ROI & Reliability Focus)

- Safety and reliability increasingly valued
- Hawai'i differentiated in time of global disruption
- Planners consistently report Hawai'i delivers measurable increases in attendance, engagement and overall event performance



Competitive Response

Relationship Focus

- Deepening engagement with global associations, medical congress organizers, and incentive houses
- Increased in-market partner collaboration
- Leveraging ABTS, Singapore and in-market partners to influence earlier site selection decisions

Maintaining Presence

- Consistent in-market visibility and engagement
- Maintaining top-of-mind positioning as demand returns

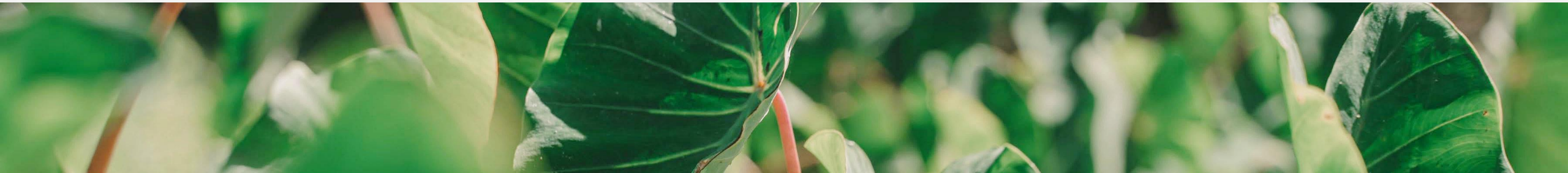
Conversion Opportunity

- Capturing deferred and displaced demand as confidence returns
- Converting displaced MCI business from destinations in crisis
- Target incentives aligned with evolving planner expectations



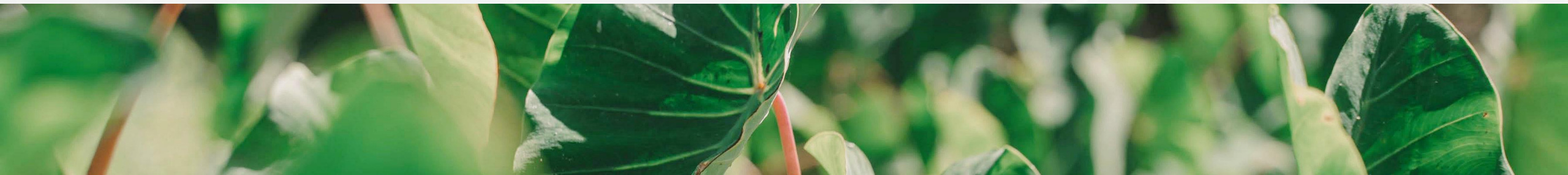
Production & Pipeline Position – Citywide

- Citywide: Active close window through June 30, with 9 high-probability opportunities representing 99,000+ tentative room nights currently advancing
- Forward pipeline remains strong, with 51 active leads representing 451K room nights and \$1.5B in potential economic impact
- Strategic focus on converting near-term opportunities while building long-term demand for 2028 and beyond
- Mix of 51 active citywide leads is well balanced across association, corporate, and sports segments, supporting both Waikīkī need periods and increasing pre/post opportunities on neighbor islands



Production & Pipeline Position – Single Property

- Single Property performance is driving stability, with February pipeline showing +23% in leads and +55% in room nights year-over-year
- Forward pipeline remains strong with team at 84% to achievement of June 2026 tentative goal representing \$309.1M in potential economic impact.
- Strategic Focus on converting business for need periods 2026-2027 including competitive opportunities from Mexico and Middle East.
- Pace trends indicate shorter booking windows, with a higher share of decisions inside 6 months, reinforcing the need for flexible offers and quick turnaround on leads.



Market Engagement & Partnerships

Q1 Market Engagement (Delivered)

- HIS/JTB Continued Collaboration
- **PCMA Convening Leaders (Philadelphia)**
- CESSE CEO Board Meeting
- AIME 2026 (Melbourne)
- **Meet New York**
- **Northern California Road Show**

Q2 Market Activation (Pipeline)

- **Corporate Focused Events (Osaka & Tokyo)**
- Japan Summit
- California SAE Elevate
- **SportsETA**
- Destinations International – Sales, Services
- **IAEE Women's Leadership Forum**
- Japan Corporate Event (Tokyo)
- **Texas Roadshow - Dallas, Fort Worth, Austin (spots available)**
- Meet Hawai'i Oceania Aloha Mission (Australia)



Marketing & Communications

Campaigns & Content

- **Maui Incentive Campaign** – driving incentive demand and supporting Maui recovery
- **Meetings & Mo'olelo** – cultural storytelling to differentiate Hawai'i

Digital & Social Engagement

- **LinkedIn** – targeted planner engagement and content amplification; 40K impressions
- Digital presence supporting awareness across priority markets

Partner Tools & Communication

- **Citywide Pace & Travel Click Reports** providing visibility into MCI performance and opportunities
- **Extranet** – supporting partner engagement with active MCI leads
- **Partner communication and alinement** across island stakeholders



Selling Today, Building for Tomorrow

- **International Market Development**

MOU's with ABTS and Singapore

HIS/JTB Continued Collaboration (Single Property/Citywide)

Corporate focused events in Osaka and Tokyo

- **2028-2029 HCC Promotion**

Enhanced incentives for groups committing by June 30. Meet Hawai'i and HCC aligned on every active opportunity

- **Multi-Year Incentives (short term)**

Multi-year agreements securing 2026 through 2028 in a single commitment—converting near-term interest into long-term pipeline.

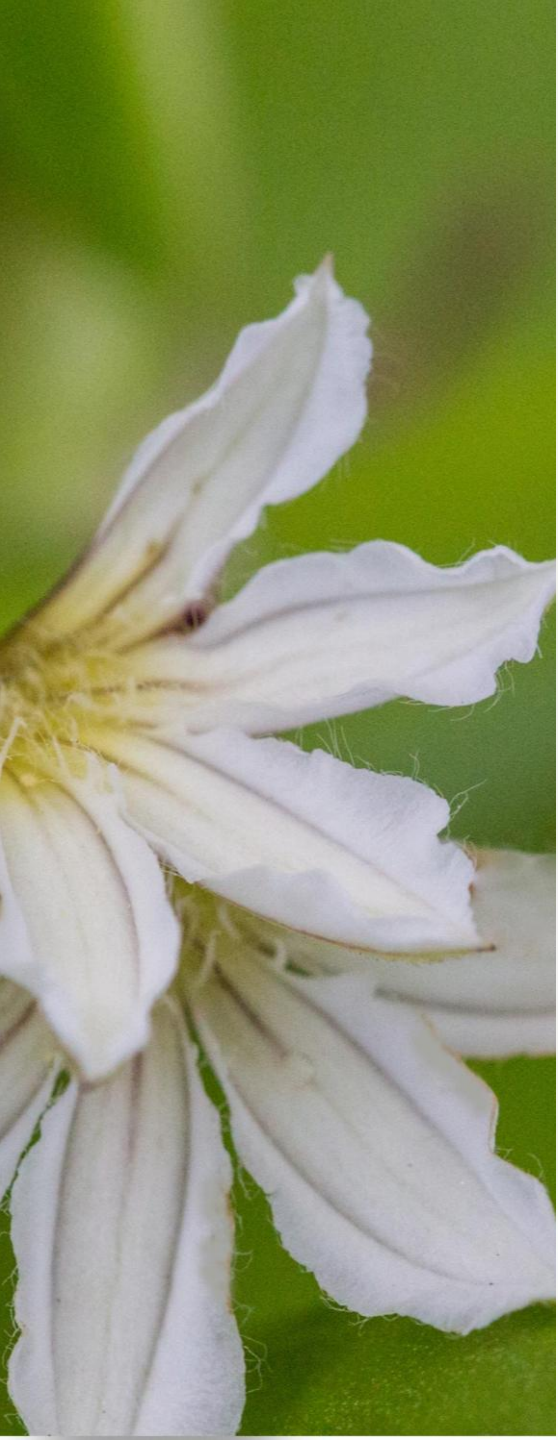
- **Data & Alignment**

Integration of HVCB and HCC CRM and Market Insights tools to improve pipeline visibility and conversion strategy

- **Legacy Impact Framework**

Embedding community stewardship in MCI sales approach - ensuring the groups we bring to Hawai'i reflect the values of the destination.





Positioned for Recovery and Long-term Growth

Alignment across hotels, island partners, and Meet Hawai'i is critical to sustaining the destination during this cycle

A consistent booking pattern shows **citywide driving repeat business (54%), while single property generates new demand (70%+)—**balancing stability and growth.

Hawai'i's citywide medical meetings consistently exceed attendance forecasts, with most outperforming projections by **15–25% on average, which is why we are prioritizing strategic partnerships in this segment**

With a team positioned across global and domestic markets, Hawai'i is **sustaining current demand while continuing to build future bookings**

A close-up photograph of a green leaf, showing a network of veins. The veins are a lighter green color than the leaf itself, creating a pattern of lines across the surface. The lighting is soft, highlighting the texture of the leaf.

Mahalo