



DISCOVER
Puerto Rico

SPORTS MARKET STRATEGY

DECEMBER 15, 2021

CURRENT FY
BOOKED EIC
\$7.1M

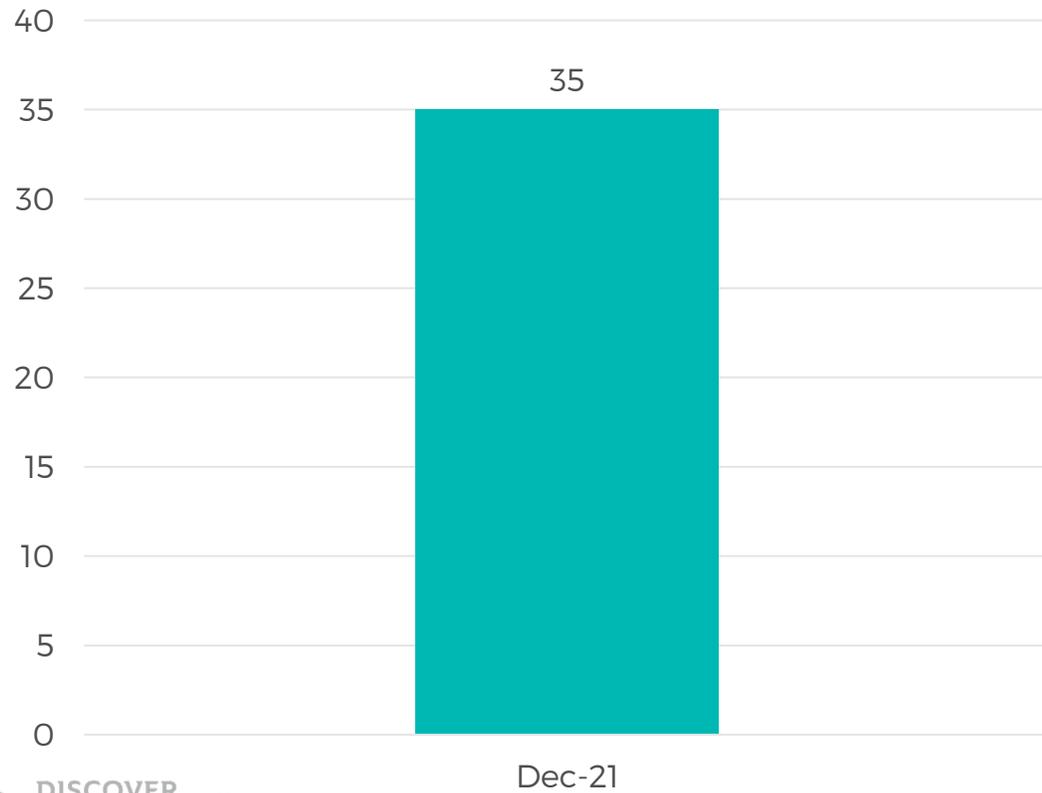
71.8

ACTIVE
PIPELINE EIC
\$64.7M

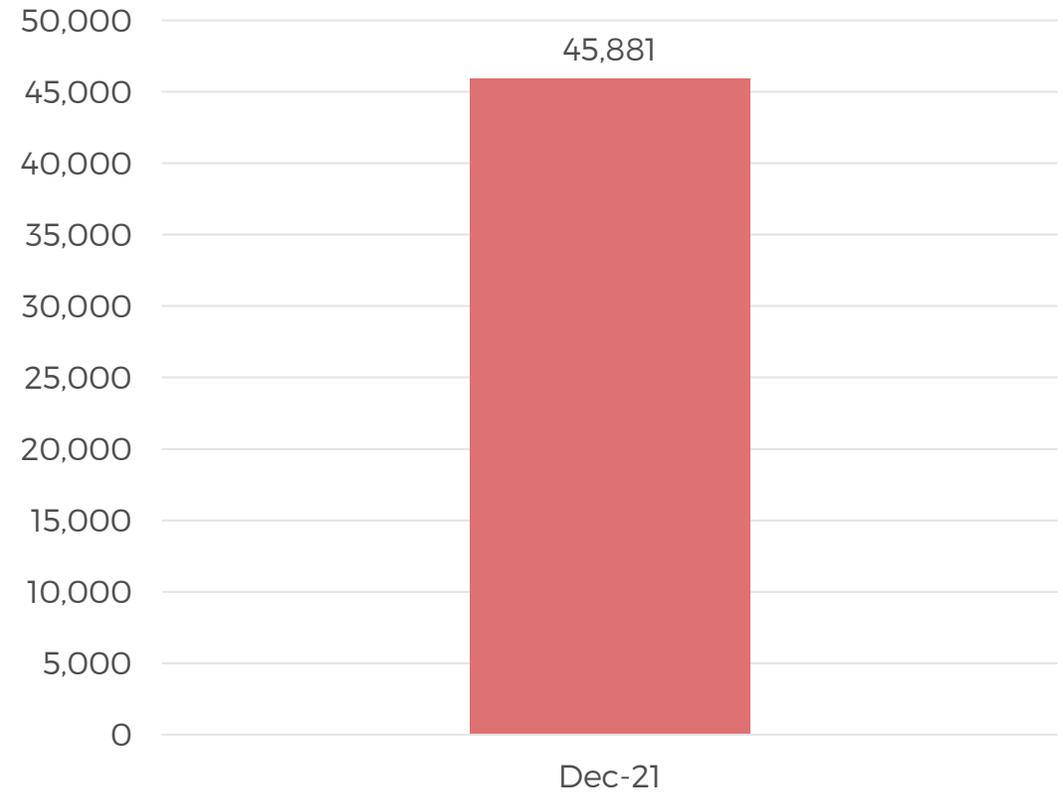
SPORTS SALES PIPELINE AS OF DECEMBER 10, 2021

\$64.7M ECONOMIC IMPACT

Leads

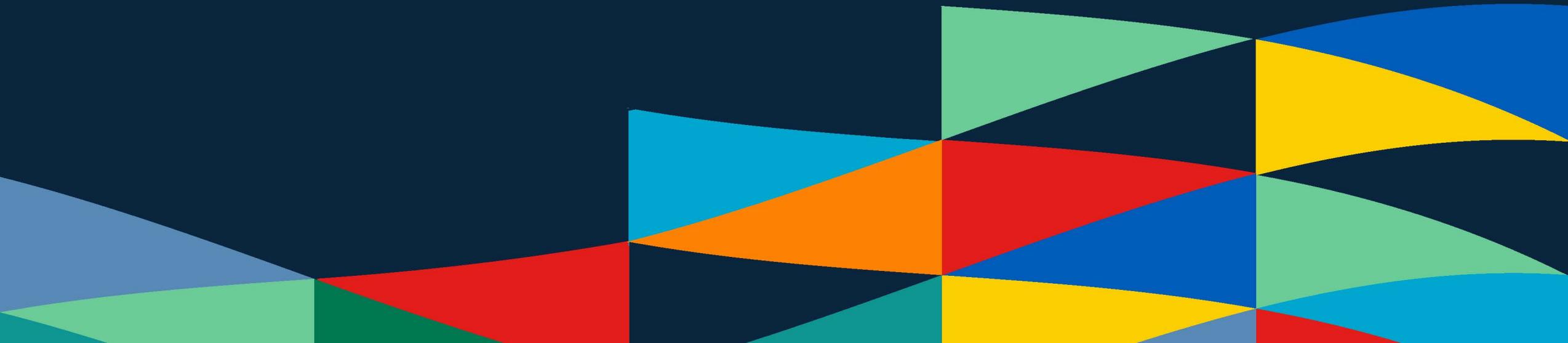


Requested Room Nights



Puerto Rico Sports Sales Strategy

12/15/21



SPORTS EVENTS AND TOURISM PERSPECTIVES AND TRENDS



Al Kidd, President & CEO
Sports ETA



Dr. Jennifer Stoll,
Research & Education,
Sports ETA

HISTORICAL PERSPECTIVE



Sports-related travel spending and annual growth
Amounts in billions of nominal dollars and year-over-year percentage growth



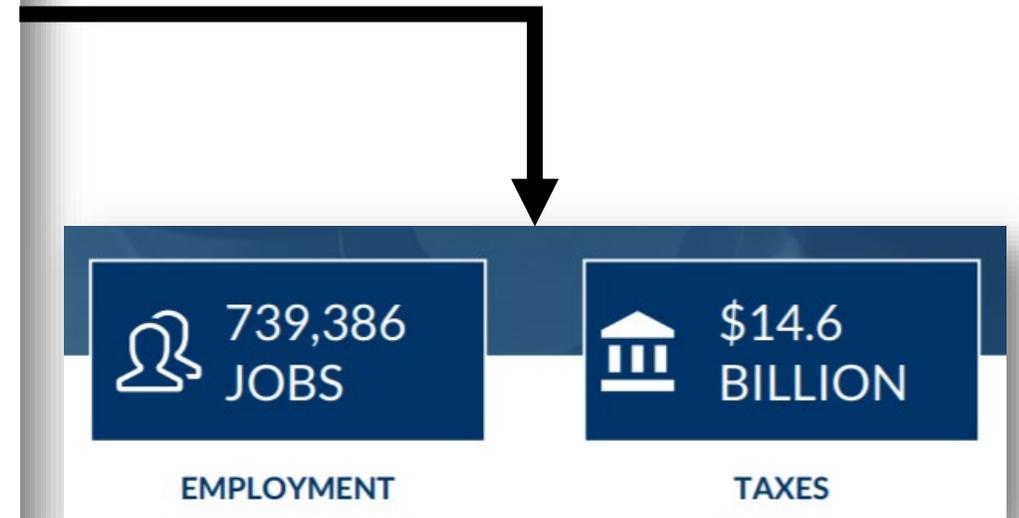
Source: Sports ETA, Longwoods International, US Travel Association, Tourism Economics

HIGH-WATER MARK

\$45.1B SPORTS-RELATED TRAVEL SPENDING (2019)



Source: Tourism Economics



\$103B Economic Impact

PANDEMIC SHIFTS

CONS

- Decreased youth interest in sport
- Increased mental health issues
- Inconsistent re-emergence

PROs

- Catalyst for tourism recovery
- Restructuring amateur sports
- Spurred innovation





CHANGE IN THINKING

An expanded definition of success...

Economic Impact	Tax Revenue	Job Creation	Brand Awareness & Perception	Earned Media	Quality of Life
Sponsorship	Volunteerism	Civic Pride	Legacy	Community Connectedness	Sustainability
Philanthropy	Health & Wellness	Social Media Impressions	Business Recruitment	Education	Resident Sentiment
		Property Values	Etc.		

RE-EMERGENCE TRENDS

- Expand definition of success
- Alternative funding mechanisms
- Owned/Operated events
- Venue/Facility development
- Sport participation and distribution shifts



MARKET ANALYSIS

STRENGTHS

- Sports is aspirational and a potential answer for getting a better life
- No passport needed to gain access
- Has the best facilities in the Caribbean
- Great weather all year-round
- Concentration of hotel rooms at San Juan metropolitan area
- Natural environment (land and sea) for outdoors sports

WEAKNESSES

- The government owns all the facilities.
- The government needs to be involved to put an event together.
- The government does not understand the timeline of sporting events.
- Lack of programming at DRD
- The cost of hotel rooms
- Lack of local partnerships to develop the sports tourism
- Hotel/Airfares price point - customer are price conscious
- A hard market healthy food options for kids, hard place to get things going.

OPPORTUNITIES

- Local federations are responsible to bring events.
- Need a volunteer system to support the sports.
- The only world certified track & field at the Caribbean.
- IF's are asking countries to run events (structure to put an event together, lack of skills,).
- Watersports event/festival at the Condado Lagoon
- Outdoors sports development based on natural resources

THREATS

- Contracts depend on the next government cycle, to create legal stability.
- There are no PE/Sports from the public-school system
- Summer tours to get people to the Islands.
- Lots of tournaments around the Caribbean.
- Tough to do sports business at the Island
- Corruption around the island. Contracts are not reliable.
- One-time destination, once a team had visited PR, the players want to go somewhere else.

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THE ELEPHANT IN THE ROOM

RIGHTS HOLDER QUOTES

"I'm just trying to put on a kids' sports tournament. Why do I have to talk to the minister of this and the minister of that? Can't I just have one point of contact who can deal with all the bureaucracy and red tape for me?"

"Rights holders need someone at a local tourism bureau who can help open doors because there are just too many moving parts between the venue, the hotels, transportation. If that doesn't happen, you're not going to have an event."

"The tourism agency has to be able to have local stakeholders on the same page so it's one voice coming out of Puerto Rico. Right now, you call the town, or a facility and you get a totally different voice. Rights holders don't want to deal with those people, they want to deal with the tourism group who's astute enough to take care of things."

"How can I sell a place to my athletes and their parents when I don't even know if the lights are going to be on at the venue? If the lights went off it would sink my event. No one would ever come back."

RIGHTS HOLDER QUOTE

“Puerto Rico has a great future with my organization’s events. We want to grow our business there and be a part of the revitalization. They (Puerto Rico) doesn’t even know the opportunities ahead of them yet.”

MARKET ASSESSMENT

Sport	Product Offering	Strengths	Weaknesses	Trends	Rank
	Very Healthy. Numerous fields for all levels of competition.	Played year-round. Facilities can meet most playing requirements.	Scheduling conflict with local leagues. Permits from government	Showcases. Professional. Holidays/Thanksgiving tournaments. Diaspora	
	Very Healthy	Ideal for tournaments for up to 8 teams playing in 1 venue. Local fed. very active in seeking intl. tourn.	Lack of available dates at PRCC for multi-court events due to saturation of local tournaments	Youth. Olympic cycle qualifying tournaments. LGBTQ+.	
	Healthy	Year-round climate. Multiple acceptable pools. Active local fed.	Hotel rates in peak travel season. Univ. recent budget cuts.	College training. Regional youth qualifiers.	
	Very Healthy. Our natural landscape makes it ideal to host these events.	Very active community. Routes can be designed almost anywhere on the Island.	Lack of timely response from the gov. for permits.	Amateurs. Professional. Solo.	
	Very Healthy	Strong community roots. Rich hosting history.	Lack of timely response by gov. for permits. Scheduling conflict at PRCC due to local tournaments.	All playing levels.	

MARKET ASSESSMENT

Sport	Product Offering	Strengths	Weaknesses	Trends	Rank
	Very healthy. Multiple facilities with 10+ courts.	Active local federation.	No standing pro court for pro play with spectator seating.	Youth. Amateur. Exhibition.	
	Moderate	Can be accommodated in many available indoor venues.	Local gyms and equipment are not in optimal conditions. Shipping costs.	Youth.	
	Adequate for 1 field. Below average for multi-team tour.	Fastest growing sport in PR. Well organized local fed. Best Soccer venue of the Caribbean.	Lack of venues with 4 or more fields.	Regional games. CONCAFAF.	
	Adequate to Healthy	Strong local producers. Rich history. Experienced staff.	Production costs. Sponsors. Broadcasts rights to ROI. High hotel rates.	Amateur Rookie Pros	
	Adequate	Overall destination attractions after the tournament. Strong local partner with International presence. Have produced events before. Coca Cola Music Hall.	Airfare accessibility for non-US travelers.	Top player in PR won 1st place last week	
		Any recreational sport presents a great opp. for PR			

STRATEGIC PRIORITIES



ELEVATE PUERTO RICO'S IMAGE AS A WORLD CLASS DESTINATION FOR THE SPORTING EVENTS MARKET SEGMENT.



ENHANCE PUERTO RICO'S COMPETITIVENESS VIA EXPANDED LEAD GENERATION AND INCREASED CONVERSION.



EXPAND PUERTO RICO'S REACH AND CLIENT ENGAGEMENT TO INCREASE THE NUMBER OF EVENTS HOSTED AND DRIVE ATTENDANCE.



GROW SPORTS MEETINGS & CONVENTIONS & LEISURE & DIASPORA VISITATION THROUGH SPORTING EVENT VISIBILITY.



ELEVATE PUERTO RICO'S IMAGE AS A WORLD CLASS SPORTING EVENT DESTINATION

- Marquis Promotional Events
 - Key industry events on Island exposure to hundreds of buyers
 - Connect Marketplace 2022
 - Pre and Post Sports FAM to showcase venue and facility offerings
- Tradeshow Presence
 - Enhanced presence at key industry events
 - Sports ETA Symposium
 - TEAMS 2021
 - Caribbean Pavilion
 - Coffee Hacienda Booth
- Strategic Partnerships
 - Alliances with key industry organizations
- Best in Class Digital Content and Marketing
 - Website, Virtual and 360 Content
 - Dedicated Sports Social Media Channel
 - PlayEasy Online Booking Platform



“PlayEasy has quickly become the Gold Standard as a technology partner for the sports events tourism industry and we will continue to upgrade our mutual product offerings”

-Al Kidd, President & CEO of Sports ETA

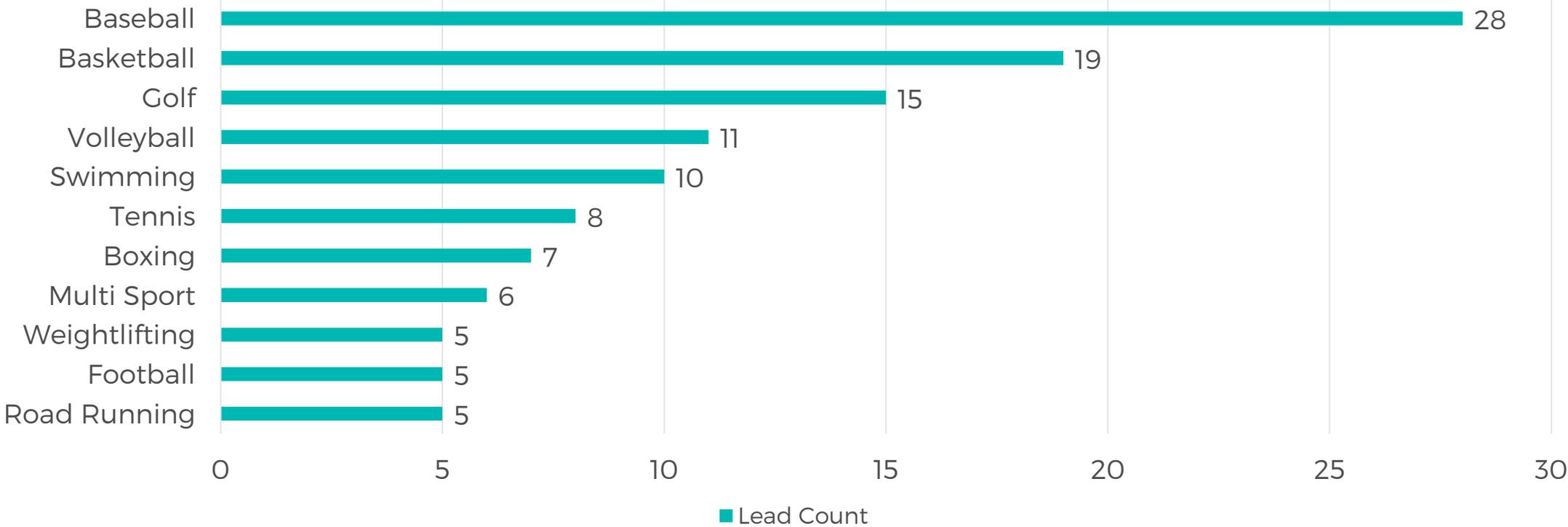




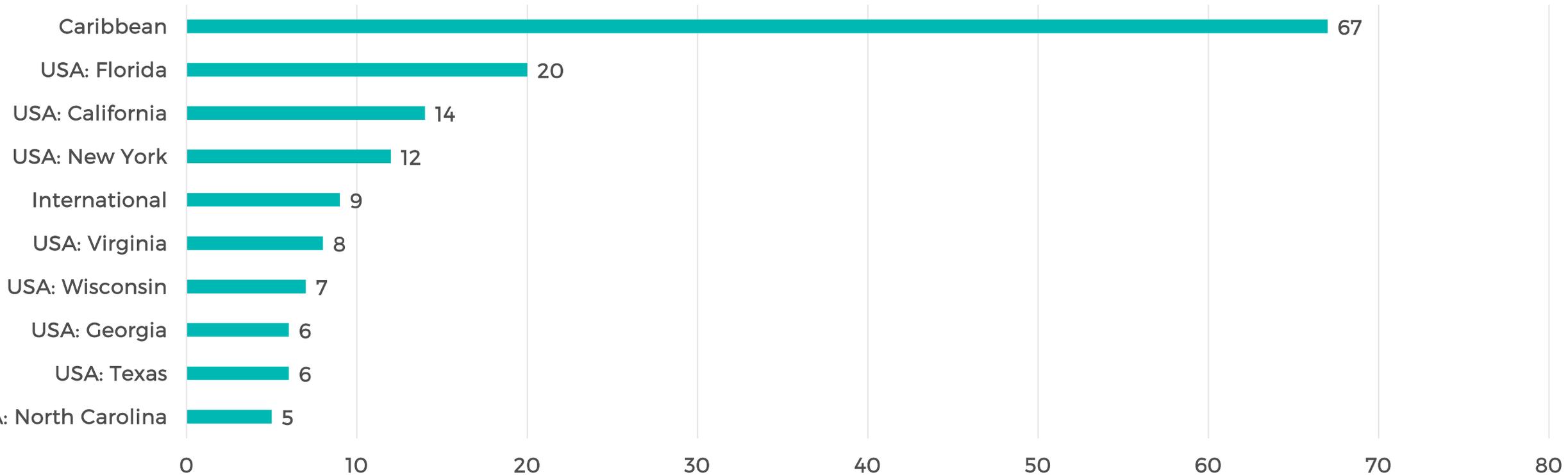
ENHANCE PUERTO RICO'S COMPETITIVENESS

- FAM Trips and Site Inspections
- Sales Missions
 - Road Shows in Key Cities
- Research Based Targeting
 - Lead Generation
- Enhanced Presence at Top Tier Events
- Business Development Fund
- MOU/Collaboration Agreements with Facilities and Universities
 - To supply demand on need periods to generate income/jobs
- Commitment with Local Sports Planners
 - Reach outside Metro Area

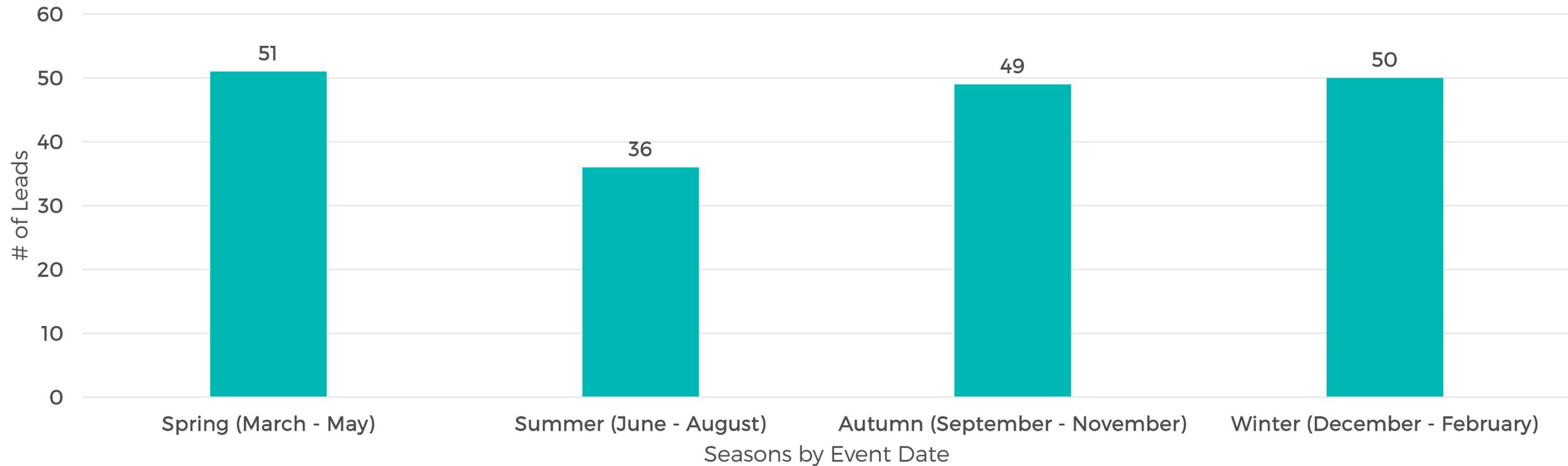
TOP SPORTS: LEAD PRODUCTION



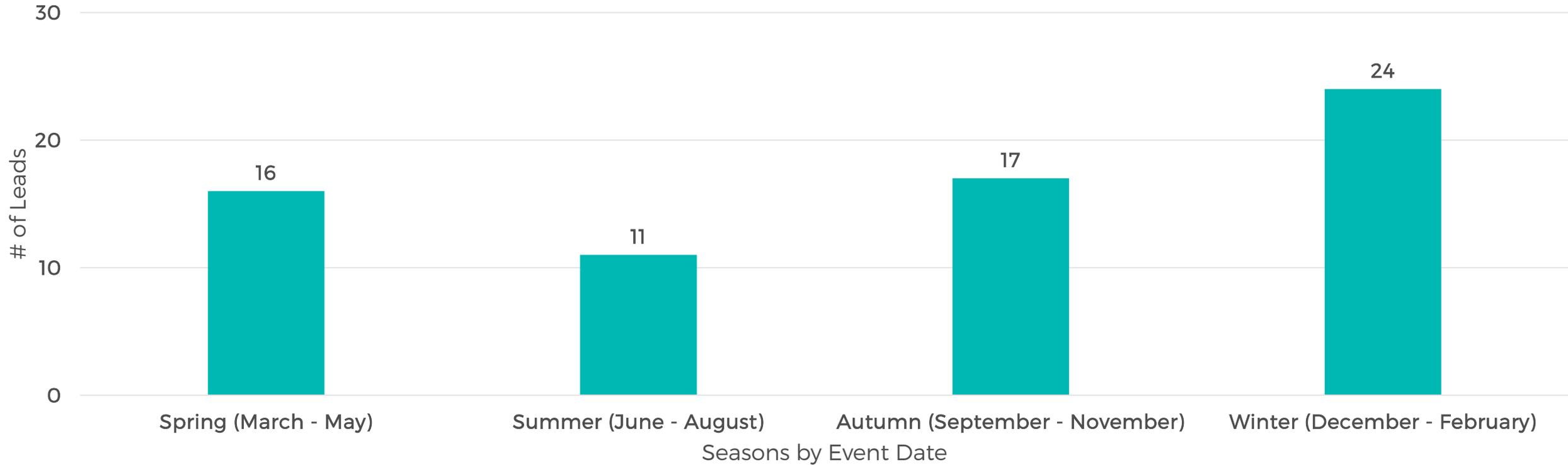
TOP 10 EVENT CONTRACT LOCATIONS BY NUMBER OF GENERATED LEADS JULY 2018 TO DECEMBER 11, 2021



LEADS BY EVENT DATE SEASON: GENERATED JULY 2018 TO DECEMBER 11, 2021



DEFINITE LEADS BY EVENT DATE SEASON: BOOKED JULY 2018 TO DECEMBER 11, 2021





GROW LEISURE & DIASPORA VISITATION VIA SPORTING EVENTS

- Research shows that Diaspora is 3X more likely to participate in youth/adult sporting events

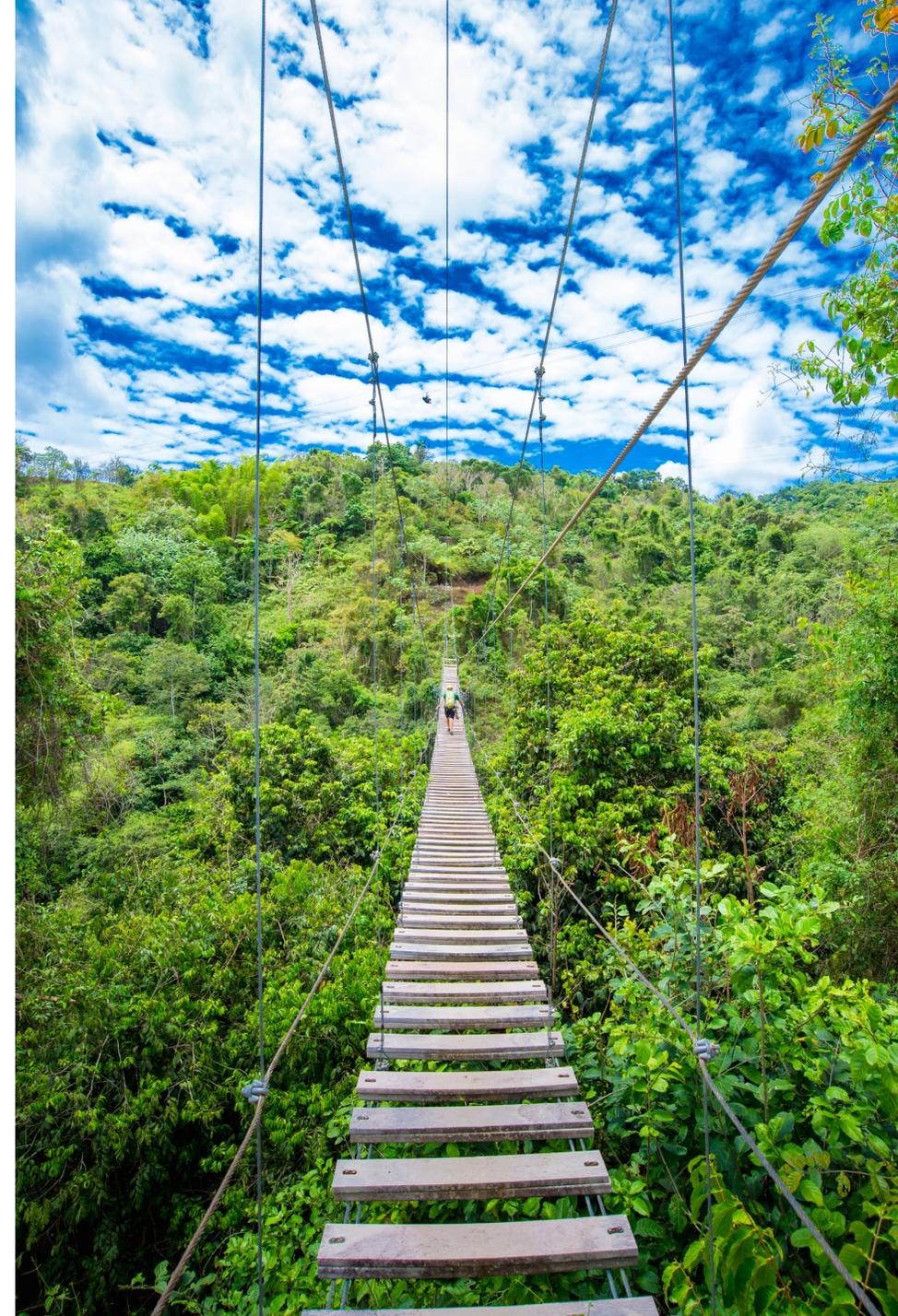
	General Population	Diaspora
Youth/Adult Sporting Event	2.2%	9.1%

“Latin/Hispanic peoples in the Americas are an increasingly emerging force in sports and culture, destined to contribute to cultural evolution in general and in sports as a formidable microcosm. The Island and American territory has a deeply rooted sports culture that goes back decades, and a passion for competitive sports and athletes of all kinds”

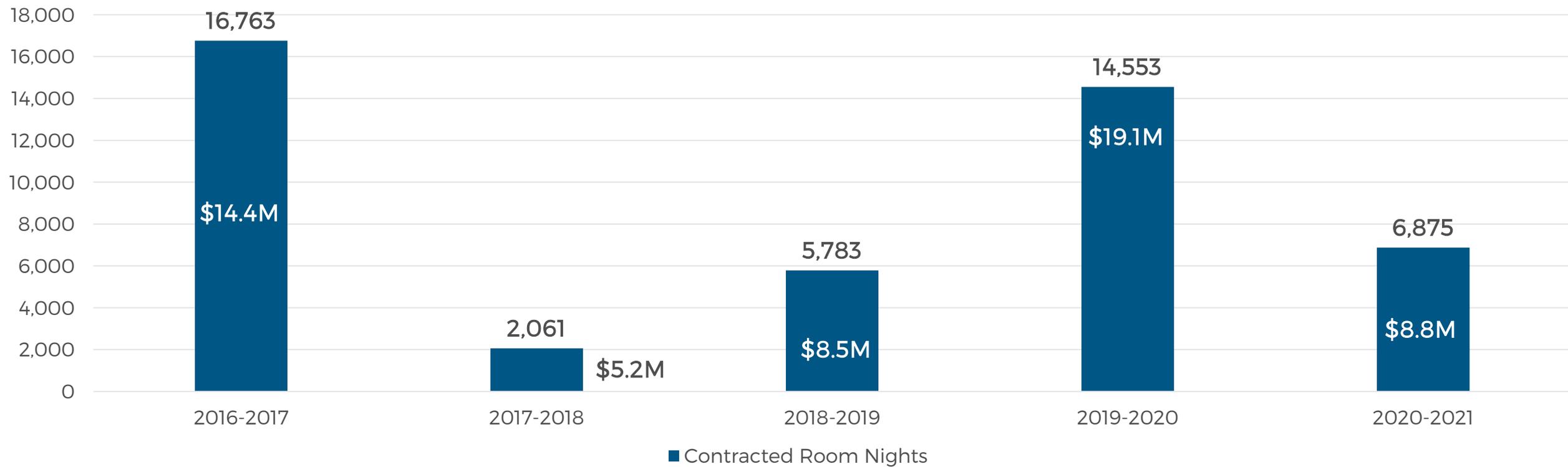
-Dan Shepherd, Owner, Dan Shepherd Public Relations

MEASURES OF SUCCESS

- Booked Event Room Nights
- Booking Conversion
- Economic Impact



BOOKED ROOMS BY FISCAL YEAR WITH ECONOMIC IMPACT



CURRENT FY BOOKED SPORTS EVENTS

<u>Event</u>	<u>Location</u>	<u>Dates</u>
Puerto Rico Beach Tennis Extravaganza	St. Regis Hotel Rio Grande	September 30 – October 4, 2021
Perfect Game San Juan Classic 2021	Hiram Bithorn Stadium	Oct. 21 – 21, 2021
International Slow Pitch Softball Boricua Cup	Pedro Cepeda Stadium Catano	October 21-24, 2021
Texas Wesleyan University Golf Tournament	Wyndham Rio Mar Rio Grande	October 31 – November 4, 2021
Sports Tours International San Juan Shootout	Roberto Clemente Coliseum San Juan	November 26-27, 2021
Dorado Beach Collegiate Golf	Dorado TPC	Feb. 25-28, 2022
IronMan Puerto Rico	Escambron Beach, San Juan	March 20, 2022
Caribbean Volleyball Championships	PRCC	April 1-3, 2022
Puerto Rico Classic & Laurie Hernandez Champions Challenge	PRCC	Dec. 15-18, 2022





POWERING PUERTO RICO THROUGH *SPORTS*