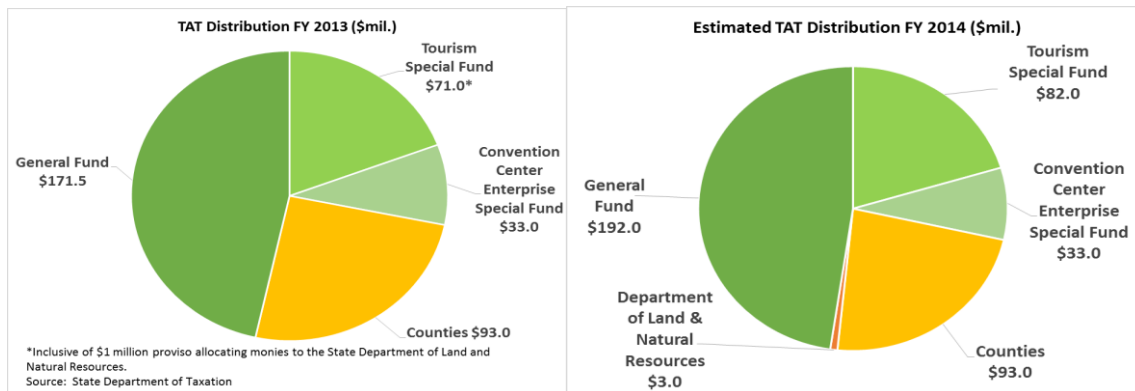




HAWAII TOURISM FACTS

Benefits of Hawaii's Tourism Economy

- Tourism is the largest single source of private capital into Hawaii's economy and a significant export for the U.S. economy.
- Tourism contributed to \$1.5 billion in total state tax revenue in 2013, an incremental \$30 million year over year.
- For every \$1,000,000 in direct visitor expenditures, tourism supports 11.2 jobs, according to the U.S. Chamber of Commerce.
- Tourism is the biggest generator of jobs among the major economic sectors, supporting 168,000 jobs in Hawaii in 2013.
- Honolulu is ranked as the 4th busiest international port of entry for the U.S., according to the U.S. Department of Commerce.
- The TAT is currently held at 9.25%. In FY2013, the state collected \$368.5 million in transient accommodations tax (TAT).
- The HTA estimates that the TAT will generate \$403 million in 2014.
- There are 920 flights from 52 cities.



2013: A Milestone Year for Tourism

- For calendar year 2013, Hawaii's tourism industry generated \$14.5 billion in total annual visitor spending, an average of \$39 million in spending per day:
 - \$20 million on O'ahu per day
 - \$10 million on Maui per day
 - \$5 million on Hawaii Island per day
 - \$4 million on Kaua'i per day
- There are 10.9 million total air seats to Hawaii, providing residents and visitors access between the Hawaiian Islands and global destinations. Air access remains the key to Hawaii's economic and social prosperity.



Hawai'i Tourism Industry's Road to Recovery

Total expenditures for Hawai'i's tourism economy peaked in 2007 with an average of \$35 million in visitor spending per day. However, in 2008, the Hawai'i visitor industry took a turn, affected by various economic and social factors including:

- Closure of Aloha Airlines and ATA
- Global financial crisis
- H1N1 pandemic
- Loss of two Hawai'i-based cruise ships
- Increases in oil prices

Year	Total Daily Expenditures	# of Jobs Supported
2013	\$40 million	168,000
2012	\$39 million	167,000
2011	\$34 million	156,000
2010	\$30 million	145,000
2009	\$27 million	134,000
2008	\$31 million	151,000
2007	\$35 million	172,000

In order to recover the market, the HTA worked with businesses and its industry partners to:

- Enhance strategic plans to incorporate marketing programs that drive travel demand, visitor arrivals and spending
- Rejuvenate and leverage the "Hawaiian Islands" brand
- Focus efforts on increasing airlift to Hawai'i
- Expand access and distribution to the neighbor islands
- Support programs that enhance and promote Hawai'i's people, place and culture
- Diversify the HTA's global and domestic major markets

Opportunities for Growth

- Travel during shoulder periods: April-May, October-November
- Renovations and upgrades to Hawai'i's tourism product (hotels, attractions, natural resources)
- Distribution to neighbor islands

Island	Occupancy Rate
O'ahu	86%
Maui	79%
Hawai'i Island	72%
Kaua'i	69%

Source: Hospitality Advisors LLC, January 2013

The HTA continues to work toward building upon this momentum in order to balance and enhance resident and visitor experiences, authentically promote Hawai'i's people, place and culture, and strengthen and diversify the state's tourism economy.