HAWAI‘I TOURISM

AUTHORITY

E Kū i ka Moku: Together We Will Succeed

2012 ANNUAL REPORT
to the Hawai‘i State Legislature
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Letter from the Hawai‘i Tourism Authority

Aloha

On behalf of the Hawai‘i Tourism Authority (HTA), the state agency for tourism, we would like to present the HTA’s Annual Report for calendar year 2012, E Kū i ka Moku: Together We Will Succeed. This report covers activities, accomplishments and challenges from January through October 2012 and reflects our activities as it relates to the HTA Strategic Plan.

Last year, we were pleased to see tourism contributing $11.9 billion to our state’s economy, or 18 percent of gross state product, and $1.1 billion in tax revenue. Hawai‘i’s tourism economy continued to grow in 2012 and led us to revise our targets upward in July to reach an anticipated $13.9 billion in direct visitor expenditures and 7.89 million visitors. We continue to work towards meeting and exceeding these targets, as set in the HTA Strategic Plan.

Behind the growth are approximately 154,000 hard-working men and women of our visitor industry, which account for 18 percent of total employment for the state. They provide insight, strategy and world-class service 365 days a year. It is our people, place and culture that make Hawai‘i so unique and special, and the aloha spirit that draws millions of guests back to the Hawaiian Islands every year.

As we look to the future, we will continue to work diligently to remain competitive in the global marketplace. Thanks to the 2012 Hawai‘i State Legislature, we will have the opportunity to expand our efforts, with the approval of an additional $2 million for international marketing. The funds are aiding the HTA in enhancing access and promotions in China, Korea, Japan, Oceania (Australia, New Zealand), Southeast Asia and Europe.

We were pleased to achieve numerous initiatives that highlight and help to perpetuate the Hawaiian language and culture. This year the HTA implemented the Ma‘ema‘e Tool Kit, created to ensure that the Hawaiian culture is highlighted and represented appropriately when marketing the Hawaiian Islands. In addition, the HTA, in partnership with Bank of Hawai‘i and Office of Hawaiian Affairs, developed a Hawaiian language option for ATMs, which was the first of its kind in the state. Our agency also committed to using both official languages of Hawai‘i (‘Ōlelo Hawai‘i and English) on our stationary and business cards. We continue to commit ourselves to our host culture which permeates throughout all of our programs.

It is also important for us to engage our youth and provide education and career opportunities so they can stay in Hawai‘i, and be a part of the next generation of Hawai‘i’s hospitality industry. In order to help achieve this, we worked with the Department of Education on programs that provide a pathway for students who are considering careers in the industry.

As we reflect on the past year and what we have achieved, from the year-over-year monthly growth in visitor expenditures and arrivals to the increases of air seats and new routes to the Hawaiian Islands, we are grateful for the support of the state, counties, community and visitor industry in helping us achieve these goals. We will work to continue to strike a balance between the industry and our community in order to sustain our tourism economy well into the future.

Me Ka Mahalo Nui,

Ronald Williams
HTA Board Chair

Mike McCartney
HTA President &
Chief Executive Officer
Overview of the Hawai‘i Tourism Authority

Background
In 1998, the Hawai‘i Tourism Authority (HTA) was established through a legislative act as the lead state agency for Hawai‘i’s visitor industry. This same act also established the Tourism Special Fund: a set percentage of the transient accommodations tax (TAT) collections that is assessed on hotels, vacation rentals and other accommodations; to be used by the HTA to market, develop and support Hawai‘i’s tourism economy. Among its responsibilities, the HTA is charged with:
- Setting tourism policy and direction from a statewide perspective;
- Developing and implementing the state's tourism marketing plan and efforts;
- Managing programs and activities to sustain a healthy visitor industry for the state;
- Developing and monitoring implementation of the Hawai‘i Tourism Strategic Plan: 2005-2015 (State TSP); and
- Coordinating tourism-related research, planning, promotional and outreach activities with the public and private sectors.

Operations
The HTA is administratively attached to the State Department of Business, Economic Development & Tourism (DBEDT). The HTA’s president and chief executive officer reports directly to the HTA board of directors and is responsible for assisting the board in its responsibility to execute the mandates of Chapter 201B of the Hawai‘i Revised Statutes.
Board of Directors (As of October 2012)

**Members**  
**Ronald K. Williams, Chair**  
President & CEO  
Atlantis Adventures, LLC

**Patricia A. Ewing, Vice Chair**  
President  
Ewing, Ltd.

**Kelvin M. Bloom**  
President  
Aston Hotels and Resorts, LLC

**Jack Corteway**  
President & CEO  
Royal Aloha Vacation Club

**Patrick K. Fitzgerald**  
CEO  
Hualalai Investors, LLC  
Kona Village Investors, LLC

**L. Richard Fried, Jr.**  
City & County of Honolulu  
Partner  
Cronin, Fried, Sekiya, Kekina & Fairbanks, Attorneys At Law

**Victor T. Kimura**  
Director of Operations Support  
Kyo-ya Management Company, Ltd.

**Michael K. Kobayashi**  
President, Polynesian Hospitality  
Kobayashi Travel Service, Ltd.

**Craig G. Nakamura**  
Maui County  
Partner  
Carlsmith Ball LLP

**David Rae**  
Senior Vice President  
Development 'Āina Nui Corp & Kapolei Property Development

**Aaron J. Salā**  
Owner/CEO  
AJS Productions, LLC

**Lorrie Stone**  
Attorney At Law  
Lorrie Lee Stone, Attorney At Law, LLC

| At-large |

**Board of Directors (L - R):** Michael K. Kobayashi; Aaron J. Salā; L. Richard Fried, Jr.; Patrick K. Fitzgerald; Patricia A. Ewing, Vice Chair; Ronald K. Williams, Chair; Kelvin M. Bloom; Victor T. Kimura; Craig G. Nakamura and Jack Corteway (Not pictured): Lorrie Stone and David Rae

**Staff**

**Mike McCartney**  
President and Chief Executive Officer

**David Uchiyama**  
Vice President, Brand Management

**Doug Murdock**  
Vice President, Administrative and Fiscal Affairs

Caroline Anderson  
Tourism Brand Manager

Lynn Bautista  
Contracts and Administrative Manager

Maile Caravalho  
Accounting Assistant

Minh-Chau Chun  
Tourism Research Manager

Jadie Goo  
Tourism Brand Manager

Irene Iha  
Fiscal Administrative Assistant

Grace Lee  
Tourism Brand Manager

Dawn Lino  
Administrative Assistant

Lawrence Liu  
Tourism Research Statistician

Chika Miyauchi  
Administrative Assistant

Stella Montero  
Budget/Fiscal Officer

Daniel Nāhoa’opii’i  
Director of Tourism Research

Janna Nakagawa  
Administrative Assistant

Melissa Ortega  
Secretary

Roann Rakta  
Executive Assistant and Human Resources Officer

Angela Rodriguez  
Communications and Tourism Brand Manager

Michele Shiwaki  
Administrative Assistant

Michael Story  
Tourism Brand and Sports Manager

Vengie Talaro  
Administrative Assistant

Marc Togashi  
Fiscal Manager

Keli‘ihoaalani Wilson  
Director of Hawaiian Cultural Affairs
Hawai‘i Tourism Strategic Plan: 2005-2015 and Hawai‘i Tourism Authority Strategic Plan: 2012-2014

Hawai‘i Tourism Strategic Plan: 2005-2015

In 2004, the HTA, with assistance and input from the industry and the community, developed the State Tourism Strategic Plan (TSP). This 10-year plan is focused on creating a sustainable future for Hawai‘i’s visitor industry and identifies a shared vision for Hawai‘i tourism by all stakeholders.

By 2015, tourism in Hawai‘i will:
• Honor Hawai‘i’s people and heritage;
• Value and perpetuate Hawai‘i’s natural and cultural resources;
• Engender mutual respect among all stakeholders;
• Support a vital and sustainable economy; and
• Provide a unique, memorable and enriching visitor experience.

The plan also provides a road map that includes the following components for achieving that vision:

- Guiding principles and Native Hawaiian values;
- Performance indicators to help measure the collective success;
- Nine (9) strategic initiatives that were identified as the priorities needed to achieve the vision; and
- Lead and support partners in the public and private sectors who need to work together on each initiative to achieve the overall vision.

Hawai‘i Tourism Authority Strategic Plan: 2012-2014

The goal of the HTA Strategic Plan is to optimize benefits for Hawai‘i and integrate the interests of visitors, the community and the visitor industry. To achieve these goals, the HTA will:

- Implement marketing programs across diverse major market areas to stimulate short-term visitor arrivals and expenditures;
- Utilize an integrated brand management approach to efficiently drive demand and deliver a unique and satisfying Hawai‘i experience for both visitors and residents;
- Ensure the availability of air seats and continue to build sustainable cruise ship access to Hawai‘i;
- Elevate Meetings, Conventions and Incentives (MCI) efforts, with emphasis on international markets; and
- Actualize and demonstrate HTA’s transformation into a more knowledge-based and efficient state tourism agency which maximizes the return on investment of state tax collections.

Destination Brand Management

As the state’s tourism agency, one of the HTA’s key strategic roles is brand management, where the HTA works to promote the Hawaiian Islands through the support of programs and events that emphasize the Hawai‘i brand. The HTA coordinates with its global marketing partners, visitor industry partners, travel trade and community stakeholders to ensure that marketing and communications tactics are in line with Hawai‘i’s unique and distinctive products, including natural resources, Hawaiian culture and multi-cultures.

Through these efforts, the HTA manages, creates and supports the development of unique tourism experiences such as community and cultural festivals, sporting events, natural resources and other community programs. The HTA also directly affects the visitor experience through its support of career development, safety and security, and visitor assistance initiatives, all the while integrating community and resident considerations and respect for the Hawaiian host culture.
Access

Connectivity through air access remains a critical life line to the state’s tourism industry as well as Hawai‘i’s economy overall. The HTA has worked diligently over the past year to develop new routes to further diversify the market, while also adding frequency in some areas, which has helped to keep a competitive balance. Seat inventory has increased nine percent since 2011 to 10.1 million seats, which is just short of Hawai‘i’s peak year in 2006 when seat capacity was 10.3 million. It is important to note that in 2006 a healthy portion of seat inventory was used for the three NCL ships that were servicing the Hawaiian Islands. The rebuilding of seat inventory for the state has been strategically formulated with focus on greater direct distribution to the neighbor islands. The HTA works with Ailevon, LLC air service consulting to lay out these plans and interface with the many carriers both at airline conferences and individual one-on-one meetings to cultivate opportunities.

Enhancing Hawai‘i’s Life Line

Since being appointed as the State Department of Transportation (DOT) Deputy Director of the Airports Division in 2011, Ford Fuchigami has applied his experience in hospitality and service to the state’s 15 airports. In line with the Governor’s New Day Plan and in partnership with the HTA, Ford has helped to bridge the gap between the DOT’s state airports and tourism industry stakeholders, creating cohesive collaborations and effective partnerships.

The DOT Airports Division has become a one-stop shop for negotiating and planning air service to Hawai‘i. Ford and his team oversee everything from determining rates and charges, availability of gates and time slots, engineering, baggage handling, ticket counters, cleaning, economic impact and carrying capacity of hotels and businesses within surrounding areas of the airport.

Re-instilling pride in airport employees and creating a Hawaiian sense of place through workforce training, greetings programs, and airport displays, Ford has helped to enhance customer service, cleanliness and aesthetics of airports throughout the state. His efforts have not only led to elevating the airport experience, but have also helped to increase airlift, and inevitably arrivals to the Hawaiian Islands.

“Without the hard work and support of our airport employees, partners, stakeholders and lawmakers, we would not have been able to make the progress we have so far,” said Ford. “We still have a long way ahead but continue to work toward creating efficient and attractive travel experiences at our airports throughout the Hawaiian Islands.”

Ford Fuchigami (third from left) at the blessing of the Governor’s Lounge at the Honolulu International Airport
Hawaiian Culture

Hawai’i’s host culture and community are key to the sustainability of its visitor industry. The HTA recognizes that it is Hawai’i’s people, place and culture that enhance the visitor experience and works to honor and perpetuate the Hawaiian culture.

In 2012, the HTA awarded funding to seven (7) community-based projects through its Kūkulu Ola: Living Hawaiian Culture Program; supported five (5) Hawaiian Signature Events; provided funding to the Native Hawaiian Hospitality Association (NaHAA), the lead agency in the Hawaiian culture initiative; and launched the Ma’ema’e Tool Kit, which helps to ensure that Hawai’i is being marketed in a sensitive manner.

A full listing of the projects supported by the HTA can be found on page 32.

Perpetuating the Hawaiian Culture through Mainstream Media

Hawai’i’s rich culture and heritage is unique to the Hawaiian Islands and offers a competitive advantage over similar tropical destinations. Understanding the value and significance of this asset, the HTA has continued to commit its efforts to celebrating and perpetuating the Hawaiian culture through its Kūkulu Ola: Living Hawaiian Culture Program.

Through this initiative, the HTA partnered with Amy Kalili, executive director of Makauila, Inc., a non-profit organization dedicated to perpetuating the Hawaiian culture through the creation and distribution of Hawaiian language, education and cultural multimedia ventures.

In 2012, Amy commenced production for a new mini documentary series called “Nā Loea” for ‘Ōiwi TV, Hawai’i’s first and only Native Hawaiian television station. “Nā Loea” will feature an array of loea, or experts, and their life experiences, cultural practices and Hawaiian perspectives as a way of preserving and promoting the Hawaiian culture through mainstream media. The series on ‘Ōiwi TV is available in March 2013 on digital channel 326 and at www.oiwitv.com.
Natural Resources

The HTA’s Natural Resource Program was established to respect, enhance and perpetuate Hawai‘i’s unique natural resources and environment. From 2003, the HTA has provided $1 million each year to support efforts that manage, improve and protect Hawai‘i’s natural environment and areas that are frequented by visitors, through the Community-Based Natural Resources Program.

In 2012, 13 community-based projects throughout the state were supported through an RFP process. An additional $1 million was provided to the Department of Land and Natural Resources (DLNR) to support programs such as the Nā Ala Hele Trails and Access Program and its State Parks Division. The HTA also supported the DLNR in its efforts to restore the shoreline of Waikīkī Beach in the spring of 2012.

A full listing of the projects supported by the HTA can be found on page 32.

Waikīkī Beach Restoration Project supported by the HTA

As an island state, Hawai‘i’s natural resources are a precious commodity that set the Hawaiian Islands apart from other destinations. In order to monitor, sustain and nurture these natural resources, the HTA supports various projects and studies. In 2012, the HTA worked with Dolan Eversole at the University of Hawai‘i Sea Grant College Program and its Center of Excellence for Sustainable Coastal Tourism to conduct a study on the impacts of climate change on the tourism industry.

The “Climate Change Impacts to Hawai‘i’s Tourism Industry and Coastal Communities: Benchmark Analysis and Outreach Study” focused on reviewing the scientific and economic impacts of climate change to Hawai‘i’s tourism industry, in alignment with the recently passed Act 286. Following the conclusion of the report, workshops were held throughout the state to share the study, generate discussion and identify top priorities for response and mitigation strategies.

“Hawai‘i’s tourism economy continues to be the economic cornerstone of the state,” said Dolan. “Therefore adapting the current tourism infrastructure to the present and projected climate change, and developing strategies for sustainable growth of the visitor industry are essential.”

“Developing strategies for sustainable growth of the visitor industry are not only highly desirable but essential for the long-term sustainability of the industry.”

Dolan Eversole
University of Hawai‘i
Sea Grant College Program
Safety and Security

The HTA is a support entity that helps advance the safety and security of visitors and is committed to assisting other lead agencies and organizations responsible for ensuring that Hawai‘i continues to be a safe and secure visitor destination. In the event of a crisis or emergency situation, the HTA collaborates with state and county civil defense agencies, the visitor industry and federal agencies to keep visitors aware and informed.

The HTA also supports the Visitor Assistance Programs (VAP), which provide assistance and support for visitors to the Hawaiian Islands whom have been affected by a crime or other adversities during their stay.

“I went from feeling totally lost, to feeling looked after.”
Margaret, visitor from Australia assisted by VASH

Sharing Aloha with Visitors in Need

“They (visitors) come to appreciate the aloha spirit and leave with better feelings about Hawai‘i.”
Jessica Lani Rich
Visitor Aloha Society of Hawai‘i

Visitor Aloha Society of Hawai‘i (VASH) has been helping visitors who encounter hardship in the Hawaiian Islands since 1997. President and executive director Jessica Lani Rich has been with the non-profit organization for 12 years.

More than 100 volunteers, many of whom speak different languages, help to support VASH in aiding visitors who have been a victim of a crime, been in an accident, experienced a death in the family while vacationing, or other challenges. Through the support of the HTA and other businesses and organizations that offer funding, rooms and ground transportation, VASH is able to assist approximately 2,000 visitors a year.

“When something unfortunate happens to a visitor, it creates a negative experience for their holiday and they leave Hawai‘i with that feeling,” said Jessica. “So we often step in and provide assistance and aid when they least expect it, and most of them are so pleased to get this help. They come to appreciate the aloha spirit and leave with better feelings about Hawai‘i.”

For more information on VASH, visit www.visitoralohasocietyofhawaii.org
Brand Experiences

The HTA creates, develops and supports programs and projects that deliver unique experiences, which align with our people, place and culture under its Brand Experience area. The HTA oversees the Signature Events, Product Development and Product Enrichment Programs. Signature Events align with the HTA’s brand and aim to draw visitors to experience the diversity and rich culture unique to the Hawaiian Islands, have high media exposure and economic impact. The Product Development Program fosters and cultivates programs and/or projects that provide a variety of offerings for the visitor, and the HTA provides tools for businesses and community organizations to further grow and develop its tourism product. Lastly, the Product Enrichment Program is a community-initiated program that the HTA, in partnership with the counties, selects through an RFP process. Efforts under this initiative are the County Product Enrichment Program (CPEP), Kūkulu Ola: Living Hawaiian Culture Program, and the Community-Based Natural Resources Program. In 2012, the HTA provided support that benefited 24 Major Festivals and Events, 104 CPEP projects, seven (7) Kūkulu Ola projects and 13 Community-Based Natural Resources projects statewide.

A full listing of the projects supported by the HTA can be found on page 32.
Festivals and Events

In an effort to draw visitors during the traditionally slower spring and fall shoulder periods, the HTA worked with the industry and stakeholders to drive interest and demand for travel to the Hawaiian Islands by creating events and promotions, such as the Hawai‘i Food and Wine Festival, Aloha Festivals and Mele Mei. The success of these, and other marketing efforts, have helped the HTA in increasing visitor expenditures and arrivals throughout 2012.

Experiencing Hawai‘i through the Culinary Arts

In 2011 Hawai‘i-chefs Alan Wong and Roy Yamaguchi came together to help create the annual Hawai‘i Food and Wine Festival. In its second year, the HTA-supported event attracted more than 3,500 visitors and residents to experience Hawai‘i through its cuisine.

“Through the event, we created an internationally recognized culinary destination event with cooperation among all industry partners,” said Roy. “Everyone supports one another, which helped make the Hawai‘i Food and Wine Festival a success.”

Alan and Roy wanted the event to focus on using local products, so the produce, meats and seafood that were prepared by 62 world renowned chefs came from Hawai‘i’s farmers, ranchers and fishermen.

“What is really important when chefs from all over the world come to Hawai‘i and cook with local products is it spotlights Hawai‘i – our farmers, product, culture and cuisine,” said Alan.

Proceeds from the Festival benefited five local non-profit organizations including the Hawai‘i Agricultural Foundation, University of Hawai‘i Culinary Institute of the Pacific, Leeward Community College Culinary Arts Program, Paepae o He‘eia and Papahana Kualoa.
Sporting events enhance Hawai‘i’s economy, image and quality of life. To optimize these benefits, the HTA developed a sports marketing program designed to increase Hawai‘i’s presence to a globally competitive level, diversify the visitor experience, highlight the state’s unique attributes, and build a sustainable sports tourism market.

The HTA continued to work with the PGA TOUR and ESPN in bringing numerous prestigious events to the islands, and other sporting events such as the Vintage Rugby World Cup, Hawaiian Islands Invitational Soccer Tournament and LPGA Lotte Championship.

A full listing of the sporting events supported by the HTA can be found on page 32.

**Sports Programs**

**LPGA Returns to the Hawaiian Islands**

This year, Hawai‘i welcomed back the LPGA for the first annual Lotte Championship. Through the hard work and efforts of Justin George of 141 Hawai‘i, the state hosted an LPGA event following a three-year absence.

Justin has been a key player in coordinating and executing prestigious sporting events, like the Sony Open, in the Hawaiian Islands for nearly 14 years. When the LPGA pulled the tournament from the state in 2009, Justin worked with the organization, local resorts and businesses to introduce the new HTA-supported LPGA Lotte Championship.

“What was amazing about this inaugural tournament, was 97 of the top 100 female golfers from the LPGA came to play,” said Justin. “It really was a testament to the draw of Hawai‘i. There were three Hawai‘i golfers that were in the tournament field too. With a wait of three years since the last LPGA tournament in Hawai‘i, many locals were eager to see them play.”

Through the many years of working on these events, Justin is still amazed at the support and dedication of the thousands who have and continue to volunteer.

“The volunteer support has been tremendous. We had more than 1,700 volunteers for the Sony Open and 600-700 for the Lotte Championship who committed their time, and worked hard to make these events possible,” he added.

For more information on the Lotte Championship, visit www.lottechampionship.com.

“**What was amazing about this inaugural tournament, was 97 of the top 100 female golfers from the LPGA came to play. It really was a testament to the draw of Hawai‘i.”**

Justin George
141 Hawai‘i
Career Development

To support hospitality efforts, the HTA works with lead agencies to make service learning opportunities available for Hawai‘i’s current and future workforce, including certification programs to enable providers to deliver quality service. The HTA also invests in cultural training programs to better prepare Hawai‘i’s visitor industry to be able to meet the needs of Hawai‘i’s increasing number of visitors from emerging and non-English speaking markets. Some of the initiatives include the Chinese, Korean and Japanese Language Culture Training program, hospitality and tourism programs at DOE high schools, Leadership Exploration and Inspiration (LEI) program for Hawai‘i’s youth, and training sessions for Hawai‘i’s teachers to better educate them on the visitor industry.

Providing Hawai‘i’s Youth Opportunities in the Hospitality Industry

Since 2003, Todd Nakayama has been teaching Waipahu High School students about the importance of Hawai‘i’s visitor industry and ways to prepare themselves for a career in tourism through the Academy of Hospitality and Tourism (AOHT).

Through AOHT, Todd provides students with opportunities to shadow or intern with industry professionals giving them first-hand experiences in Hawai‘i’s hospitality industry. He estimates that approximately 90 percent of his AOHT students continue on to have careers in tourism, some of them with the businesses they interned with through AOHT.

“Even for me personally, I did an internship to provide my students with better insight into the industry,” said Todd. “I ended up staying on and continue to work at the Marriott Ko Olina Beach Club on a part-time basis. I really enjoy the work and being a part of the industry.”

Todd has been fortunate that numerous businesses have helped to support Waipahu’s AOHT program year after year.

“Through the HTA’s and other businesses’ support I would not have been able to continue to grow this program,” he added.
Marketing

Marketing the Hawaiian Islands continued to be a priority for the HTA in 2012. Visitor spending and arrivals reached record highs throughout the year due in large part to the successful marketing efforts put forth by the HTA’s global marketing partners. Targets were adjusted upward in July to reflect the strength in the major market areas (MMAs) and continued growth for Hawai‘i’s tourism economy.

Growth from the international MMAs has been significant in recent years.

The establishment of Brand USA in 2010, a global marketing effort to promote the United States as a premier travel destination, will help to increase awareness of the Hawaiian Islands as a destination. Hawai‘i is fortunate to be represented on the board of directors by local chef Roy Yamaguchi.

The efforts of Brand USA to promote the U.S. and Hawai‘i internationally, are supported by an additional $2 million in funding for the HTA allocated by the Hawai‘i State Legislature in 2012. The funds are aiding the HTA in enhancing access and promotions in China, Korea, Japan, Oceania, Southeast Asia and Europe.

Leisure Marketing

The HTA contracts with five (5) marketing organizations to promote Hawai‘i in each MMA: Hawai‘i Visitors and Convention Bureau (HVCB), Hawai‘i Tourism Japan (HTJ), Hawai‘i Tourism Oceania (HTO), Hawai‘i Tourism Asia (HTAsia), and Hawai‘i Tourism Europe (HTE). These MMAs include U.S. East, U.S. West, Japan, Canada and other developing international markets. The HTA contractors are responsible for developing strategic marketing plans and cooperative programs, including advertising, public relations, promotions, travel trade marketing, education and training, and stakeholder communications and relations.

Budget Allocations by MMA in 2012 ($mil.)

<table>
<thead>
<tr>
<th>Region</th>
<th>2012 Allocations ($mil.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>$28.611 (72.2%)</td>
</tr>
<tr>
<td>Japan</td>
<td>$7.609 (19.2%)</td>
</tr>
<tr>
<td>Other Asia</td>
<td>$2.000 (5.0%)</td>
</tr>
<tr>
<td>Europe</td>
<td>$2.000 (0.5%)</td>
</tr>
<tr>
<td>Oceania</td>
<td>$1.200 (3.0%)</td>
</tr>
<tr>
<td>Total</td>
<td>$39.620</td>
</tr>
</tbody>
</table>

Visit Statistics

<table>
<thead>
<tr>
<th>Region</th>
<th>2011 Total</th>
<th>% Change*</th>
<th>2012 Target</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>7,299,047</td>
<td>4.0%</td>
<td>7,890,278</td>
<td>8.1%</td>
</tr>
<tr>
<td>Expend. ($mil.)***</td>
<td>$12,070.3</td>
<td>10.8%</td>
<td>$13,924.5</td>
<td>15.4%</td>
</tr>
<tr>
<td>U.S. West</td>
<td>2011 Total</td>
<td>% Change*</td>
<td>2012 Target</td>
<td>% Change*</td>
</tr>
<tr>
<td>Arrivals</td>
<td>2,994,731</td>
<td>2.4%</td>
<td>3,116,204</td>
<td>4.1%</td>
</tr>
<tr>
<td>Expend. ($mil.)</td>
<td>$4,142.8</td>
<td>5.9%</td>
<td>$4,498.0</td>
<td>8.6%</td>
</tr>
<tr>
<td>U.S. East</td>
<td>2011 Total</td>
<td>% Change*</td>
<td>2012 Target</td>
<td>% Change*</td>
</tr>
<tr>
<td>Arrivals</td>
<td>1,642,279</td>
<td>2.0%</td>
<td>1,723,978</td>
<td>5.0%</td>
</tr>
<tr>
<td>Expend. ($mil.)</td>
<td>$3,108.2</td>
<td>8.1%</td>
<td>$3,300.1</td>
<td>6.2%</td>
</tr>
<tr>
<td>Canada</td>
<td>2011 Total</td>
<td>% Change*</td>
<td>2012 Target</td>
<td>% Change*</td>
</tr>
<tr>
<td>Arrivals</td>
<td>477,564</td>
<td>17.9%</td>
<td>501,291</td>
<td>5.0%</td>
</tr>
<tr>
<td>Expend. ($mil.)</td>
<td>$906.0</td>
<td>21.5%</td>
<td>$1,1016.4</td>
<td>12.2%</td>
</tr>
<tr>
<td>Japan</td>
<td>2011 Total</td>
<td>% Change*</td>
<td>2012 Target</td>
<td>% Change*</td>
</tr>
<tr>
<td>Arrivals</td>
<td>1,241,805</td>
<td>0.2%</td>
<td>1,360,645</td>
<td>9.6%</td>
</tr>
<tr>
<td>Expend. ($mil.)</td>
<td>$2,164.0</td>
<td>13.9%</td>
<td>$2,488.5</td>
<td>15.0%</td>
</tr>
<tr>
<td>Other Asia</td>
<td>2011 Total</td>
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<tr>
<td>Arrivals</td>
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<td>282,019</td>
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<td>Expend. ($mil.)</td>
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<td>Arrivals</td>
<td>119,825</td>
<td>6.3%</td>
<td>129,720</td>
<td>8.3%</td>
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<tr>
<td>Expend. ($mil.)</td>
<td>$244.0</td>
<td>6.8%</td>
<td>$274.2</td>
<td>12.3%</td>
</tr>
</tbody>
</table>

*Year-over-year growth
**Total arrivals and expenditures include air and cruise statistics. All others refer to air arrivals only.
***Does not include supplemental business expenditures. With supplemental business expenditures 2011 Total is $12,254.6 mil.
North America

North America continues to be Hawai‘i’s largest source market for visitors. This market includes the U.S. West (defined as the 11 Pacific states west of the Rockies), U.S. East (all other states) and Canada. While the U.S. economy continued to recover in 2012, demand for travel to the Hawaiian Islands from the region remained strong. The HTA continued to work with the Hawai‘i Visitors & Convention Bureau (HVCB), its marketing contractor for North America, to reach aggressive targets set by the HTA.

Flower Show Showcases Hawai‘i to the East Coast

More than 250,000 people from around the world experienced Hawai‘i on the East Coast this March through the Hawai‘i-themed Philadelphia International Flower Show, the world’s largest flower show. A 153-member Hawai‘i delegation, supported by the HTA and coordinated by the HVCB, spent more than a week at the event showcasing and sharing the many things that make the Hawaiian Islands special including beautiful flora and fauna, hula, Hawaiian music and aloha spirit. Representatives from all of the Hawai‘i counties, island chapter visitors’ bureaus and more than 20 local businesses were in attendance presenting the attributes of each of the Hawaiian Islands.

Leading Hawai‘i’s efforts in Philadelphia was Kainoa Daines, director of sales of the O’ahu Visitors Bureau. Kainoa was instrumental in working with event organizers to ensure that the flower show accurately and authentically portrayed Hawai‘i and provided guests with a true Hawai‘i experience.

“Being almost 5,000 miles away from home, it was important that we created an authentic experience that aroused all of the senses, accurately portrayed Hawai‘i, shared the aloha spirit and was culturally pono,” said Kainoa. “I spoke to a couple who last visited the Hawaiian Islands more than 30 years ago, and the show brought back great memories and gave them a renewed interest in planning a return trip next year.”

VISITOR STATISTICS

<table>
<thead>
<tr>
<th></th>
<th>2011 Total</th>
<th>2012 Target</th>
<th>% Change*</th>
<th>2012 YTD**</th>
<th>% Change*</th>
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<td></td>
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<td>$150.9</td>
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<td>5,832,742</td>
<td>6,106,920</td>
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<td><strong>U.S. East</strong></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Arrivals</td>
<td>1,642,279</td>
<td>1,723,978</td>
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<td>1,433,190</td>
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<tr>
<td>Expend. ($mil.)</td>
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<td>2,865.4</td>
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<td>772,786</td>
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</tr>
<tr>
<td><strong>Canada</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arrivals</td>
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<td>501,291</td>
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</tr>
<tr>
<td>Expend. ($mil.)</td>
<td>$906.0</td>
<td>$1,016.4</td>
<td>12.2%</td>
<td>$776.0</td>
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<tr>
<td>PPPD Spending</td>
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<tr>
<td>Air Seats***</td>
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<td>354,946</td>
<td>11.3%</td>
<td>287,843</td>
<td>14.9%</td>
</tr>
</tbody>
</table>

*Year-over-year growth  **YTD through Oct. 2012  ***Source: OAG

Kainoa Daines (far right) at the Philadelphia International Flower Show with Hawai‘i delegation

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Japan

Japan's market growth continued into 2012 with monthly arrivals and spending exceeding the previous year. Arrivals paced ahead of target expectations with growth of air seat inventory fueling this market's growth. This growth, along with the strengthening of relationships with industry partners both in Japan and throughout the state and with the addition of a new marketing contractor representing the Hawaiian Islands as Hawai'i Tourism Japan (HTJ), helped to strengthen Hawai'i's positioning in the market. The increase in industry collaboration inspired by the HTJ led the Japan Association of Travel Agency's (JATA) to enter into an MOU with Hawai'i, harnessing joint efforts to reach two million arrivals to Hawai'i from Japan in 2016.

New Contractor Helps to Grow Japan Market

The HTA welcomed a new Japan marketing contractor in 2012. Leading the HTJ team is managing director Eric Takahata, a veteran of the tourism industry. With more than 20 years of experience, Eric has helped to connect, strengthen and re-integrate all industry sectors in Japan and Hawai'i.

Through successful programs such as the 2012 JATA Travel Showcase and the Japan-Hawai'i Tourism Council (JHTC) meeting, HTJ has been able to effectively implement the HTA goals of increasing Japanese visitor arrivals, spending, experiences and airlift. The HTJ's effective guidance and assistance led the HTA and JATA to sign an MOU launching the "Hawai'i Two Million Visitors Initiative," which will establish promotions to bring an annual two-million Japanese visitors in 2016.

“Our team has worked really hard this year to continue to grow the market with access expansion and promotions in secondary cities, targeting first-timers, and strengthening our partnerships,” said Eric. “These efforts are helping to set the stage for our ‘Hawai'i Two Million Visitors Initiative’ which will benefit the state’s tourism economy.”

“HTJ’s efforts are helping to set the stage for our ‘Hawai'i Two Million Visitors Initiative’ which will benefit the state’s tourism economy.”
Eric Takahata
HTJ

VISITOR STATISTICS

<table>
<thead>
<tr>
<th></th>
<th>2011 Total</th>
<th>2012 Target</th>
<th>% Change*</th>
<th>2012 YTD**</th>
<th>% Change*</th>
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</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>1,241,805</td>
<td>1,360,645</td>
<td>9.6%</td>
<td>1,190,258</td>
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<tr>
<td>Expend. ($mil.)</td>
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<td>$2,488.5</td>
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<td>$2,146.4</td>
<td>21.4%</td>
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<tr>
<td>PPPD Spending</td>
<td>$289.1</td>
<td>$298.9</td>
<td>3.4%</td>
<td>$298.0</td>
<td>4.6%</td>
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<tr>
<td>Air Seats***</td>
<td>1,617,095</td>
<td>1,777,662</td>
<td>9.9%</td>
<td>1,536,639</td>
<td>14.2%</td>
</tr>
</tbody>
</table>

*Year-over-year growth  **YTD through Oct. 2012  ***Source: OAG
Other Asia

The Other Asia market, including South Korea, China and Taiwan, continued to grow significantly in 2012 with visitor arrivals and spending increasing by double digits quarter-to-quarter. The HTA continued to work with its marketing partner Hawai‘i Tourism Asia (HTAsia) in marketing the Hawaiian Islands to this vast and growing region. Significant increases in air seats from major hub cities and growing demand for travel to the Hawaiian Islands were contributing factors to the growth.

Visitors from Korea and China Continue to Grow

Jamie Kim is the Meetings Incentives Conventions and Exhibitions (MICE) marketing manager for Hawai‘i Tourism Korea (HTK). He has been working with HTK for four years. Jamie’s role in developing and implementing the Hawai‘i MICE Support Program has helped HTK in increasing the number of Meetings Conventions and Incentives (MCI) visitors from Korea to the Hawaiian Islands by an estimated 90 percent by the end of 2012.

“Besides the growth in the MICE market, I am proud to say the overall number of Korean visitors to Hawai‘i has more than tripled since our team started representing Hawai‘i in Korea in 2004,” said Jamie. “It’s rewarding to see the tremendous return on our investment into the market.”

David Sun has been working in tourism for nearly 20 years, eight of which were with the company representing Hawai‘i Tourism China (HTC). David is the travel trade marketing director for HTC and is the lead in both the Shanghai and Beijing offices. He and his team at HTC, were able to help secure the first direct service connecting Shanghai and Honolulu with China Eastern Airlines operating twice weekly. The flight has helped to increase Chinese visitor arrivals, who are also the biggest spenders, by 28.2 percent for the first 10 months of 2012 compared to 2011.

“This has been an exciting time for us,” said David. “Chinese visitor arrivals have been soaring over the last 12 months after the first regularly scheduled direct flight was launched from China to Hawai‘i by China Eastern Airlines. HTC and Hawai‘i’s visitor industry have all benefited from this explosive growth.”

| VISITOR STATISTICS |
|------------------|------------------|-----------------|------------------|
| Korea            | 2011 Total      | 2012 Target     | % Change*    |
| Arrivals         | 112,567         | 146,111         | 29.8%        |
| Expend. ($mil.)  | $194.0          | $272.4          | 40.4%        |
| PPPD Spending    | $238.3          | $252.0          | 5.8%         |
| Air Seats***     | 275,890         | 406,612         | 47.4%        |
| 2012 YTD*** % Change* |
| Arrivals         | 123,421         | 39.6%           |
| Expend. ($mil.)  | $220.0          | 42.0%           |
| PPPD Spending    | $246.6          | 5.7%            |
| Air Seats***     | 307,849         | 39.1%           |
| China            | 2011 Total      | 2012 Target     | % Change*    |
| Arrivals         | 81,738          | 114,170         | 39.7%        |
| Expend. ($mil.)  | $178.2          | $304.1          | 70.6%        |
| PPPD Spending    | $371.7          | $396.3          | 6.6%         |
| Air Seats***     | 10,960          | 29,848          | 173.7%       |
| 2012 YTD*** % Change* |
| Arrivals         | 86,641          | 28.2%           |
| Expend. ($mil.)  | $230.3          | 57.9%           |
| PPPD Spending    | $395.0          | 8.7%            |
| Air Seats***     | 24,220          | 322.0%          |

*Year-over-year growth **YTD through Oct. 2012 ***Source: OAG

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Oceania

Hawai‘i continued to experience consistent and strong growth in visitor arrivals from both Australia and New Zealand in 2012. Favorable currency exchange rates, additional direct air service and the marketing efforts of the HTA’s marketing partner, Hawai‘i Tourism Oceania (HTO), were significant in maintaining double-digit growth from last year in this region.

### VISITOR STATISTICS

<table>
<thead>
<tr>
<th></th>
<th>2011 Total</th>
<th>2012 Target</th>
<th>% Change*</th>
<th>2012 YTD***</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>209,976</td>
<td>264,866</td>
<td>26.1%</td>
<td>227,140</td>
<td>31.8%</td>
</tr>
<tr>
<td>Expend. ($mil.)</td>
<td>$499.3</td>
<td>$600.7</td>
<td>20.3%</td>
<td>$498.0</td>
<td>21.8%</td>
</tr>
<tr>
<td>PPPD Spending</td>
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<td>$231.5</td>
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<td>262,707</td>
<td>21.6%</td>
<td>229,137</td>
<td>30.5%</td>
</tr>
</tbody>
</table>

*Year-over-year growth **YTD through Oct. 2012 ***Source: OAG

### New Routes and Events Help to Grow Oceania Market

Helen Williams, manager for HTO’s office in Australia, has been working in the travel and tourism industry for more than 25 years. She has led the Australia team for nine years in successfully marketing the Hawaiian Islands and increasing visitor arrivals from the region year-over-year. In 2012, HTO had the opportunity to capitalize on interest of the Hawaiian Islands as a destination through new direct flights from both Brisbane and Melbourne that began in the fall. These flights open opportunities to further Australia’s visitor market share in Hawai‘i.

“We want to build sustainable tourism to Hawai‘i from Australia, and these new routes will help us to achieve that.”

Helen Williams
HTO - Australia

“My kuleana is to be the best I can be everyday and lead my team to do the same,” said Helen. “We want to build sustainable tourism to Hawai‘i from Australia, and these new routes will help us to achieve that.”

In New Zealand, HTO is led by Darragh Walshe who has been working in the industry for 25 years. This year, Darragh helped to bring the Vintage Rugby Tournament to the Hawaiian Islands, which drew nearly 1,000 rugby enthusiasts. In 2013, the HTA will also look to welcome participants and fans from across the globe for professional and amateur rugby events.

“Rugby is a hugely popular sport worldwide, so these events will draw visitors from around the world to experience the Hawaiian Islands,” said Darragh. “The aloha spirit has created a permanent impression in our company ethos and culture, and we want to share that with New Zealanders.”

### OCEANIA Contact Information

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Hawai‘i Tourism Oceania - New Zealand
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(L to R) Darragh Walshe and Helen Williams at the 2012 Hawai‘i Tourism Conference
In 2012, while the European economy remained unstable, European visitor arrivals to Hawai‘i continued to grow over the previous year. Hawai‘i Tourism Europe (HTE) continued marketing efforts in the region, specifically in Germany and the United Kingdom (U.K.) with emphasis placed on travel trade training, sales calls, fulfillment of requests from consumers, travel trade and media, and a sales and media mission (Aloha Up N Over).

**European Market Continues to Grow Steadily**

Christine Klein, of AVIAREPS Tourism, leads the Hawai‘i Tourism Europe team in marketing the Hawaiian Islands to the region, focusing on Germany and the U.K. Through her leadership, there has been consistent growth in arrivals and expenditures year-over-year, and their average length of stay is one of the longest of all of the major market areas.

“For the past eight years, we have worked to increase exposure of the Hawaiian Islands through tour operators and wholesalers,” said Christine. “And we are proud that the representation we offer the HTA in Europe has brought growth in arrivals and expenditures contributing to Hawai‘i’s economy.”

This year, Christine led her team in numerous marketing efforts that focused on promoting the Hawaiian Islands through billboard campaigns, online promotions and advertising, reaching millions of consumers and thousands of travel agencies throughout Germany and the U.K.

**VISITOR STATISTICS**

<table>
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<tr>
<th></th>
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<th>% Change*</th>
<th>2012 YTD**</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>119,825</td>
<td>129,720</td>
<td>8.3%</td>
<td>115,845</td>
<td>12.0%</td>
</tr>
<tr>
<td>Expend. ($mil.)</td>
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<td>$274.2</td>
<td>12.3%</td>
<td>$243.4</td>
<td>17.3%</td>
</tr>
<tr>
<td>PPPD Spending</td>
<td>$160.0</td>
<td>$165.8</td>
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<td>$164.1</td>
<td>2.6%</td>
</tr>
</tbody>
</table>

*Year-over-year growth  **YTD through Oct. 2012

Additional funds were also invested in the market with German and U.K. tour operators for marketing co-operatives.
Communications & Outreach

The HTA conducts communications and community outreach activities to keep stakeholders and key constituencies informed of agency initiatives, plans and programs, as well as educate the public on issues related to the visitor industry. The HTA regularly distributes news releases, statements and electronic newsletters to keep the public aware and informed of ongoing issues and opportunities relating to Hawai’i’s visitor industry. The HTA board of directors and staff also present and speak at meetings and events with government, industry, business and community leaders statewide to provide an understanding of the HTA’s role in shaping tourism for the state.

Over the past eight years, the Hawai’i Tourism Conference has become the premier annual tourism industry meeting in the state. Every year, the conference attracts approximately 600 industry professionals, media and community leaders from Hawai’i and around the world. The event features local and national visitor industry, business and cultural expert panels and presentations on tourism issues and trends, networking opportunities, and the HTA Tourism Legacy Awards. The 2012 HTA Tourism Legacy Award winners were the Daughters of Hawai’i and the Friends of ʻIolani Palace.

In 2012, the conference theme, E Kū i ka Moku: Together We Will Succeed, focused on building upon the momentum of Hawai’i’s tourism market recovery. Topics included updates and trends on airlines, hotels, the cruise industry, festivals and events best practices, social media and Hawaiian culture. One of the conference highlights included the 2013 tourism marketing plan presentations by the HTA and its global marketing partners, which shared the latest market trends, outlooks, new initiatives and opportunities for the next year.

For more information on the Hawai’i Tourism Conference, visit: http://www.hawaiitourismauthority.org/about-hta/hta-events/hawaii-tourism-conference/.
Hawai‘i Convention Center

In 2012, the world-class HCC generated more than $290 million in direct delegate spending statewide and more than $28 million in statewide tax revenue. The HCC will realize 356,515 hotel room nights as a result of off-shore groups meetings at the HCC. As of October 2012, the sales team booked nearly, 358,934* definite room nights for all future years.

*Forecast as of 10/10/12. The LOS (length of stay) is based on the: U.S. delegate staying at 8.04 nights (O‘ahu) and 9.21 nights (statewide); Asia Pacific delegate staying at 3 nights. Room nights for other types of bookings (such as local events with room nights) with offshore attendees are based on information provided by the client and noted with an asterisk (*) when applicable.

Top Events of 2012

**American Farm Bureau**
January 5-11, 2012
4,500 attendees
53,064 room nights
$31,163,797 visitor spending

**Association of Legal Administrators**
April 20-26, 2012
2,800 attendees
22,512 room nights
$13,221,005 visitor spending

**American Association of Orthodontists**
May 1-9, 2012
18,000 attendees
144,720 room nights
$84,992,174 visitor spending

**American Pain Society**
May 14-20, 2012
1,500 attendees
12,060 room nights
$7,082,681 visitor spending

**Electrochemical Society**
October 7-12, 2012
3,000 attendees
24,120 room nights
$14,165,362 visitor spending

SMG Hawai‘i and the HVCB’s Meetings, Conventions and Incentives (MCI) departments are tasked with generating new business opportunities for Hawai‘i’s meetings industry statewide and promoting the Hawaiian Islands as a world-class destination for hosting meetings, conventions and incentive programs.

The HTA took a new approach in the efforts to promote the MCI market for the state in 2012. By having the HTA, the HVCB’s MCI department and the Hawai‘i Convention Center (HCC), through SMG Hawai‘i, work closely together under a common and shared set of goals, they are collectively able to produce more robust group sales and marketing efforts.

American Academy of Neurology Annual Meeting at the Hawai‘i Convention Center
The HCC will say aloha and mahalo to Joe Davis who will retire at the beginning of 2013. Joe, the general manager of the HCC, has been in the facilities management and meetings and conventions market for nearly 25 years, 12 of which were serving the HCC.

“Working with the HCC for these past 12 years has been such an honor and pleasure,” said Joe. “It has been rewarding to see the HCC be recognized as an award-winning, first-class facility, and see how Hawai‘i’s image has also changed beyond a leisure destination into a place to conduct business too.”

Bringing Together Business and Aloha for 12 Years

Under a new marketing brand known as “Meet Hawai‘i” the HTA has led the integration and improvement in many sales and marketing areas. These include targeted research, a single database, centralized approach to marketing and a new MCI website. The HTA has also implemented a comprehensive sales performance plan in conjunction with the HVCB and the HCC. Each international marketing contractor is also responsible for marketing the MCI sector to their respective regions.

These efforts will integrate and maximize resources and talents to a single sales and marketing team which is focused on creating the highest impact in group bookings and activity for the state.

During his tenure, the HCC hosted major groups such as the American Dental Association, American Association of Orthodontists and Asian Development Bank. He also played a key role in ensuring the success of the Asia-Pacific Economic Cooperation (APEC) Leaders’ Week in Hawai‘i.

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2012 Hawai‘i Tourism Conference at the Hawai‘i Convention Center
Tourism Research
The Tourism Research Division (TRD) develops and provides statistical and analytical information and conducts special research on Hawai‘i’s visitor industry that helps to aid state marketing and product development efforts, industry planning, tourism policymaking, and provides economic information on the most important industry in our state. Some highlights for 2012 were: a project with Data.Hawaii.gov to increase the availability of tourism data through an open data platform; the increased use of dashboards and other data visualization tools to report key performance indicators to the HTA Board; the quarterly distribution of Major Market Area Profiles; and the assessment of the state Tourism Strategic Plan (TSP) and the preparation for updating the state TSP through 2020.

Ongoing Programs
- Visitor Characteristics and Expenditure Study
- Post-Visit Visitor Satisfaction and Activities Study
- Visitor Plant Inventory
- Visitor Forecasts, Industry Outlook and Market Targets
- Marketing Effectiveness and Brand Attributes Research
- Online Media Sentiment Analysis
- Air Seats Monitoring
- Evaluation and Performance Measures

HTA Research Publications
Available online at www.hawaiitourismauthority.org/research

<table>
<thead>
<tr>
<th>Publication</th>
<th>Frequency/Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Passenger Counts</td>
<td>Daily</td>
</tr>
<tr>
<td>Major Market Area (MMA)</td>
<td>Monthly, third week of the month</td>
</tr>
<tr>
<td>Highlights News Release</td>
<td>Monthly, third week of the month</td>
</tr>
<tr>
<td>Island Highlights and Arrivals by U.S. Regions (by states and Metropolitan Statistical Area (MSA))</td>
<td>Monthly, third week of the month</td>
</tr>
<tr>
<td>Air Seat Capacity Outlook Report (three-month outlook of non-stop flights to Hawai‘i)</td>
<td>Monthly, end of the month</td>
</tr>
<tr>
<td>Online Media Sentiment Report</td>
<td>Monthly</td>
</tr>
<tr>
<td>Arrivals by MMA (Countries)</td>
<td>Quarterly</td>
</tr>
<tr>
<td>MMA Profiles and Fact Sheets</td>
<td>Quarterly</td>
</tr>
<tr>
<td>Visitor Satisfaction and Activities Report &amp; Annual (full report), third quarter of calendar year</td>
<td>Quarterly (brief monitoring report)</td>
</tr>
<tr>
<td>Marketing Effectiveness Report</td>
<td>Bi-Annually</td>
</tr>
<tr>
<td>Annual Visitor Research Report</td>
<td>Annually, July</td>
</tr>
</tbody>
</table>

Daniel Nāho‘opi‘i presenting at an HTA Board Meeting
Another measurement of the HTA’s performance is the amount of TAT collections that the state receives each month. The more TAT collected, the more benefits that are accrued to the state as a whole, to the individual counties, and ultimately, to the benefit of Hawai’i’s residents. Importantly, this revenue finds its way into the local community on each island to support schools, police, infrastructure and parks, and contributes to an improved quality of life for Hawai’i residents.

In FY 2012, the state collected a total of $323.9 million in TAT, which was a 13.8 percent increase from FY 2011 when the total collection was $284.5 million.

In 2009, the Legislature passed Act 61, SLH 2009, which increased the TAT by 1% for the period of July 1, 2009 to June 30, 2010; and 2% for the period of July 1, 2010 to June 30, 2015. The revenues collected by the additional tax increase are to be deposited into the general fund, except for 12.5% that was deposited into the Tourism Special Fund for FY 2010-2011.

Act 103, SLH 2011 was passed in the 2011 Hawai’i state legislative session that capped the TAT revenue to be deposited in the HTA’s fund at $69 million. Act 171, SLH 2012 was passed in the 2012 Hawai’i state legislative session that increased the cap on TAT revenue to be deposited into HTA’s fund to $71 million. Despite the cap implemented on TAT revenue to be deposited into the HTA’s fund, the HTA remains optimistic and committed to maintaining the vitality of Hawai’i’s tourism economy.
Energizing Visitors and Residents on O‘ahu

Home of the state capitol, the nation’s only royal palace, iconic Diamond Head and world-famous Waikiki Beach, O‘ahu is “The Heart of Hawai‘i.” O‘ahu offers residents and visitors opportunities to indulge in vibrant nightlife, culinary delights, contemporary entertainment and world-class shows and events, or slow down and escape to quiet pockets of natural beauty throughout the island. As part of its branding initiative, the HTA worked with the HVCB to differentiate and brand O‘ahu’s “Town and Country” experiences as energizing for travelers that engage and relax by being active.

In order to showcase the incredible diversity of the people, place and culture on the island of O‘ahu, the HTA worked with the City and County of Honolulu, industry partners and the community to support 39 CPEP programs, five (5) Natural Resources programs and four (4) Kūkulu Ola: Living Hawaiian Culture Program Awards.

Celebrating Hawai‘i’s Fishing Heritage

As one of the best fishing grounds in the world, Hawai‘i stems from a rich fishing and seafood history and culture. For the past four years, the HTA has supported the non-profit Pacific Islands Fisheries Group (PIFG) and its increasingly popular annual Hawai‘i Fishing and Seafood Festival at Pier 38, the epicenter of Honolulu’s Fishing Village.

Through the guidance and support of PIFG treasurer and project coordinator Kendall Wong, new festivities were added in 2012 to create the Hawai‘i Fishing and Seafood Week from Sept. 28-Oct. 7. The week-long event featured: Keiki Art Contest 2012; Fishing for Hawai‘i’s Hungry benefit tournament for the Institute of Human Services; Sea-To-Me Tasting Event fundraiser benefiting the University of Hawai‘i Community College Culinary programs; and the 7th Annual Hawai‘i Fishing and Seafood Festival which included more than 100 fishing industry vendors, fresh fish displays, local seafood, fishing demonstrations, workshops and live entertainment.

This year’s events attracted 23,000 residents throughout the state and visitors from around the world seeking new and authentic experiences that perpetuate a different facet of Hawai‘i’s unique culture.

“This Festival is a model event that other coastal areas across the country should follow,” said Bill Hogarth, assistant administrator for NOAA Fisheries.
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Executive Director  
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**City & County of Honolulu**
Office of Economic Development  
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**Visitor Aloha Society of Hawai’i (O’ahu)**
Jessica Lani Rich,  
President and Executive Director  
Tel: (808) 926-8274

---

**VISITOR STATISTICS**

<table>
<thead>
<tr>
<th>O’ahu</th>
<th>2011 Total</th>
<th>2012 Target</th>
<th>% Change*</th>
<th>2012 YTD **</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>4,401,624</td>
<td>4,755,643</td>
<td>8.0%</td>
<td>4,051,692</td>
<td>11.2%</td>
</tr>
<tr>
<td>Expend. ($mil.)</td>
<td>$6,315.4</td>
<td>NA</td>
<td>NA</td>
<td>$6,089.2</td>
<td>18.7%</td>
</tr>
<tr>
<td>PPPD Spending</td>
<td>$194.4</td>
<td>NA</td>
<td>NA</td>
<td>$203.6</td>
<td>5.8%</td>
</tr>
</tbody>
</table>

**AIR SEATS***

<table>
<thead>
<tr>
<th>Honolulu</th>
<th>2011 Total</th>
<th>% Change*</th>
<th>2012 YTD **</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td>3,968,283</td>
<td>-4.3%</td>
<td>3,399,555</td>
<td>2.0%</td>
</tr>
<tr>
<td>International</td>
<td>2,592,284</td>
<td>10.2%</td>
<td>2,501,386</td>
<td>17.4%</td>
</tr>
<tr>
<td>Total</td>
<td>6,560,567</td>
<td>0.9%</td>
<td>5,900,941</td>
<td>8.0%</td>
</tr>
</tbody>
</table>

*Year-over-year growth  **YTD through Oct. 2012  ***Source: OAG

**TRANSPORT ACCOMMODATION TAX (TAT) TO CITY & COUNTY OF HONOLULU**

<table>
<thead>
<tr>
<th>O’ahu</th>
<th>FY2011</th>
<th>FY2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAT ($mil.)</td>
<td>$45.4</td>
<td>$41.0</td>
</tr>
</tbody>
</table>
From unspoiled coastlines, untamed wilderness and spiritual tranquility to championship golf courses, luxury resorts and seaside towns, the islands of Maui, Moloka‘i and Lāna‘i offer a medley of the best that Hawai‘i has to offer. With its close proximity and leisurely pace, the HTA and HVCB branded these islands as captivating, offering visitors variety, choice and spontaneous options to be as active or as relaxed as they choose.

In order to share these islands’ special offerings every year, the HTA partnered with the County of Maui to sponsor and support community-based programs like Kā‘anapali Fresh, Wailuku First Friday and the Maui Marathon. In 2012, the HTA provided funding to three (3) Community-Based Natural Resources Programs and 24 CPEP Programs.

**Showcasing the Islands of Maui through Hula**

On Sept. 8, the Maui Arts & Cultural Center (MACC) held its 7th annual Kū Mai Ka Hula international hula competition in Kahului, an HTA-CPEP-sponsored event. Cultural Programs Director Hōkūlani Holt has helped to differentiate and elevate the caliber of the Kū Mai Ka Hula to become the only adult competition on Maui, exclusive to award-winning hālau hula. This year’s event invited 181 dancers from nine hālau hula from Hawai‘i, California and Japan that attracted 731 attendees to the event, a 52 percent increase from the 2011 competition.

Showcasing the music and talent of local artists from the islands of Maui, Kū Mai Ka Hula shares the songs, landscapes and stories of Maui Nui (Maui County) and creates a deeper understanding and appreciation for what makes the islands so special.

“A competition like this benefits everyone – the hula and music communities, visitors, residents, local businesses and the tourism industry,” said Hoku. “It gives us an opportunity to celebrate all of the unique aspects that make Maui Nui islands so special.”
TRANSIENT ACCOMMODATION TAX (TAT) TO MAUI COUNTY

<table>
<thead>
<tr>
<th>Maui County</th>
<th>2011 Total</th>
<th>2012 Target</th>
<th>% Change*</th>
<th>2012 YTD**</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>2,298,741</td>
<td>2,650,277</td>
<td>15.3%</td>
<td>2,014,364</td>
<td>5.6%</td>
</tr>
<tr>
<td>Expend. ($mil.)</td>
<td>$3,211.0</td>
<td>NA</td>
<td>NA</td>
<td>$3,076.7</td>
<td>18.6%</td>
</tr>
<tr>
<td>PPPD Spending</td>
<td>$174.7</td>
<td>NA</td>
<td>NA</td>
<td>$169.3</td>
<td>12.4%</td>
</tr>
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</table>

Maui Island

<table>
<thead>
<tr>
<th>Maui Island</th>
<th>2011 Total</th>
<th>2012 Target</th>
<th>% Change*</th>
<th>2012 YTD**</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>2,168,487</td>
<td>2,488,015</td>
<td>14.7%</td>
<td>1,907,642</td>
<td>5.6%</td>
</tr>
<tr>
<td>Expend. ($mil.)</td>
<td>$3,100.4</td>
<td>NA</td>
<td>NA</td>
<td>$2,985.7</td>
<td>19.2%</td>
</tr>
<tr>
<td>PPPD Spending</td>
<td>$175.3</td>
<td>NA</td>
<td>NA</td>
<td>$195.8</td>
<td>12.8%</td>
</tr>
</tbody>
</table>

Moloka’i

<table>
<thead>
<tr>
<th>Moloka’i</th>
<th>2011 Total</th>
<th>2012 Target</th>
<th>% Change*</th>
<th>2012 YTD**</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>55,250</td>
<td>69,541</td>
<td>25.9%</td>
<td>44,476</td>
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<tr>
<td>Expend. ($mil.)</td>
<td>$28.7</td>
<td>NA</td>
<td>NA</td>
<td>$24.7</td>
<td>6.6%</td>
</tr>
<tr>
<td>PPPD Spending</td>
<td>$111.6</td>
<td>NA</td>
<td>NA</td>
<td>$117.0</td>
<td>4.4%</td>
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</table>

Lāna’i

<table>
<thead>
<tr>
<th>Lāna’i</th>
<th>2011 Total</th>
<th>2012 Target</th>
<th>% Change*</th>
<th>2012 YTD**</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>75,004</td>
<td>92,721</td>
<td>23.6%</td>
<td>62,246</td>
<td>-1.4%</td>
</tr>
<tr>
<td>Expend. ($mil.)</td>
<td>$82.3</td>
<td>NA</td>
<td>NA</td>
<td>$66.3</td>
<td>0.2%</td>
</tr>
<tr>
<td>PPPD Spending</td>
<td>$314.9</td>
<td>NA</td>
<td>NA</td>
<td>$309.1</td>
<td>1.9%</td>
</tr>
</tbody>
</table>

AIR SEATS***

<table>
<thead>
<tr>
<th>Kahului</th>
<th>2011 Total</th>
<th>% Change*</th>
<th>2012 YTD**</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td>1,537,738</td>
<td>-1.2%</td>
<td>1,343,851</td>
<td>4.2%</td>
</tr>
<tr>
<td>International</td>
<td>150,856</td>
<td>22.7%</td>
<td>134,118</td>
<td>13.1%</td>
</tr>
<tr>
<td>Total</td>
<td>1,688,594</td>
<td>0.5%</td>
<td>1,477,969</td>
<td>5.0%</td>
</tr>
</tbody>
</table>

*Year-over-year growth  **YTD through Oct. 2012  ***Source: OAG

TRANSIENT ACCOMMODATION TAX (TAT) TO MAUI COUNTY

<table>
<thead>
<tr>
<th>Maui County</th>
<th>FY2011</th>
<th>FY2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAT ($mil.)</td>
<td>$23.5</td>
<td>$21.2</td>
</tr>
</tbody>
</table>

MAUI Contact Information

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Caroline Anderson
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Rejuvenating the Spirit and Economy on Kaua‘i

As the oldest island in the Hawaiian island chain, Kaua‘i rejuvenates locals and visitors with lush scenery and breathtaking, iconic attractions like Nāpali Coast and Waimea Canyon. Its idyllic and peaceful setting led the HTA and HVCB to brand the island as a rejuvenating destination, where relaxation and reconnection with nature are the top priorities.

In 2012, the HTA worked with Kaua‘i County, industry partners and the community to support and promote sustainable events and projects that preserve and promote the island’s idyllic natural resources and culture, including one (1) Kūkulu Ola: Living Hawaiian Culture Program Award, two (2) Natural Resources programs and 19 CPEP Programs.

Striking a Chord with Residents and Visitors on Kaua‘i

For the past five years, the Red Clay Jazz Festival, has set a precedent for jazz events throughout the state. At the heart of this HTA-sponsored event is jazz festival coordinator Judy Arigo who is also a board member of the all-volunteer Kaua‘i Concert Association. Coordinating everything from volunteer support, artist selection, sponsorships, ticket sales and promotions, Judy has been instrumental in growing awareness and popularity for the Red Clay Jazz Festival.

Starting as a one-day event in 2007, the Red Clay Jazz Festival is now a four-day, island-wide festival. In 2012, the event gathered 1,200 locals and visitors, and exposed them to local and nationally known jazz musicians and Kaua‘i chefs and produce.

“There are so many genres of jazz that anyone can come to appreciate and make their own,” says Judy. “This is one of the reasons for the success of our event. I know a couple who comes back to Kaua‘i for the Red Clay Festival to celebrate their anniversary every year and the event just keeps growing. It has become an endearing part of what makes our island so special and unique.”
**Visitor Statistics**

<table>
<thead>
<tr>
<th></th>
<th>2011 Total</th>
<th>2012 Target</th>
<th>% Change*</th>
<th>2012 YTD**</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>1,011,500</td>
<td>1,189,920</td>
<td>17.6%</td>
<td>905,168</td>
<td>6.8%</td>
</tr>
<tr>
<td>Expend. ($mil.)</td>
<td>$1,193.6</td>
<td>NA</td>
<td>NA</td>
<td>$1,188.7</td>
<td>22.6%</td>
</tr>
<tr>
<td>PPPD Spending</td>
<td>$154.7</td>
<td>NA</td>
<td>NA</td>
<td>$175.3</td>
<td>14.6%</td>
</tr>
</tbody>
</table>

**Air Seats***

<table>
<thead>
<tr>
<th></th>
<th>2011 Total</th>
<th>% Change*</th>
<th>2012 YTD***</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td>511,660</td>
<td>15.0%</td>
<td>469,339</td>
<td>9.7%</td>
</tr>
<tr>
<td>International</td>
<td>7,504</td>
<td>2.7%</td>
<td>12,782</td>
<td>146.8%</td>
</tr>
<tr>
<td>Total</td>
<td>519,164</td>
<td>14.8%</td>
<td>482,121</td>
<td>11.4%</td>
</tr>
</tbody>
</table>

*Year-over-year growth **YTD through Oct. 2012 ***Source: OAG

**Transient Accommodation Tax (TAT) to Kaua‘i County**

<table>
<thead>
<tr>
<th></th>
<th>FY2011</th>
<th>FY2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAT ($mil.)</td>
<td>$14.9</td>
<td>$13.5</td>
</tr>
</tbody>
</table>

**Kaua‘i Contact Information**

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Inspiring the World with the Island of Hawai‘i’s Natural Wonders

The Island of Hawai‘i erupts with excitement every day with one of the most diverse landscapes in the world. From lush rain forests to volcanic deserts, snow-capped mountaintops to beautiful white, black and green sand beaches, Hawai‘i Island offers inspiration and awe through its natural wonders, unique culture and experiences only offered on Hawai‘i’s Big Island. These opportunities for exploration and wonder are reasons why the HTA and HVCB branded Hawai‘i Island as an inspiring destination that lures active and adventurous travelers to the island.

Pana‘ewa Stampede Rodeo

The HTA annually partners with the County of Hawai‘i, industry partners and community organizations to support programs, events and projects that help to perpetuate and sustain the landscape and heritage that make Hawai‘i Island so special. In 2012, the HTA helped to fund 22 CPEP, one (1) Community-Based Natural Resources Program and one (1) Kūkulu Ola: Living Hawaiian Culture Program.

Preserving Hawai‘i’s Unique Paniolo Culture

A self-proclaimed cowgirl, Nancy Cabral, the rodeo secretary for the Hawai‘i Horse Owners, Inc. has contributed more than 20 years of rodeo and paniolo experience and expertise to enhancing the HTA-supported Pana‘ewa Stampede Rodeo in Hilo, Hawai‘i.

Unique to Hawai‘i Island, the paniolo culture continues to thrive on the island through festivals like the two-day Pana‘ewa Stampede Rodeo held every February. Dedicated to preserving this rich and unique heritage, Cabral and her team have helped to grow the event to one that attracts 5,000 attendees, 400 of which were visitors from out-of-state in 2012.

“County events like these supported by the HTA help to drive visitor spending to all islands and showcase what is uniquely different than the other islands,” said Cabral. “The Pana‘ewa Stampede Rodeo provides another reason to take one more plane ride, stay at one more hotel, rent another car, eat out, spend more money and enjoy a different part of Hawai‘i that you cannot get flying only to O‘ahu.”
### Visitor Statistics

<table>
<thead>
<tr>
<th>Hawai‘i Island</th>
<th>2011 Total</th>
<th>2012 Target</th>
<th>% Change*</th>
<th>2012 YTD**</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>1,318,310</td>
<td>1,583,985</td>
<td>20.2%</td>
<td>1,184,965</td>
<td>8.0%</td>
</tr>
<tr>
<td>Expend. ($mil.)</td>
<td>$1,498.2</td>
<td>NA</td>
<td>NA</td>
<td>$1,396.2</td>
<td>16.1%</td>
</tr>
<tr>
<td>PPPD Spending</td>
<td>$151.8</td>
<td>NA</td>
<td>NA</td>
<td>$163.0</td>
<td>7.7%</td>
</tr>
</tbody>
</table>

### Air Seats***

<table>
<thead>
<tr>
<th>Location</th>
<th>2011 Total</th>
<th>% Change*</th>
<th>2012 YTD***</th>
<th>% Change*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Kona</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domestic</td>
<td>574,934</td>
<td>-3.2%</td>
<td>506,429</td>
<td>5.1%</td>
</tr>
<tr>
<td>International</td>
<td>11,980</td>
<td>-84.0%</td>
<td>15,947</td>
<td>77.6%</td>
</tr>
<tr>
<td>Total</td>
<td>586,914</td>
<td>-12.2%</td>
<td>522,376</td>
<td>6.4%</td>
</tr>
<tr>
<td><strong>Hilo</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domestic</td>
<td>37,052</td>
<td>0.0%</td>
<td>50,940</td>
<td>95.5%</td>
</tr>
<tr>
<td>International</td>
<td>0</td>
<td>NA</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td>Total</td>
<td>37,052</td>
<td>0.0%</td>
<td>50,940</td>
<td>95.5%</td>
</tr>
</tbody>
</table>

*Year-over-year growth **YTD through Oct. 2012 ***Source: OAG

### Transient Accommodation Tax (TAT) to County of Hawai‘i

<table>
<thead>
<tr>
<th>Hawai‘i Island</th>
<th>FY2011</th>
<th>FY2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAT ($mil.)</td>
<td>$19.1</td>
<td>$17.3</td>
</tr>
</tbody>
</table>

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**HAWAI‘I ISLAND Contact Information**

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**Big Island Visitors Bureau**
George Applegate, Executive Director
Tel: (808) 961-5797
bigisland@hvcb.org

**Hawai‘i County**
Office of Economic Development
Stephanie Donoho, Tourism Specialist
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**Visitor Aloha Society of Hawai‘i Island**
LJ Dates, III, Executive Director
Tel: (808) 756-0785 (West Hawai‘i)
Tel: (808) 756-1472 (East Hawai‘i)
The following is a complete listing of HTA program awards, events, news releases and media statements from January 1 - October 31, 2012.

Hawaiian Culture

2012 Kūkulu Ola Awards
2012 Princess Ka‘iulani Keiki Fest: A celebration of the culture, cuisine and music of Ni‘ihau
Ambassadors of Aloha:
  The Legacy of the Hawaiian Room
Ho‘oluulu ‘Aina-Lohe ‘Aina
Ho‘oluulu ka ‘Ulu-Breadfruit Festivals and Interactive Education 2012
  Integrating Hawaiian Cultural Practices within Mākeke Kapolei:
Ma Ka Hana Ka ‘Ike, Learn by Doing Kani Ka Oli
Nā Loea

Native Hawaiian Festivals Program
Prince Kūhiō Celebration
Merrie Monarch Hula Festival
King Kamehameha Celebration
Prince Lot Hula Festival
Aloha Festivals

Hawaiian Cultural Program Advisory Council
Nā‘ālehu Anthony,
  Palikū Documentary Films
Peter Apo,
  Office of Hawaiian Affairs
Kainoa Daines,
  Oahu Visitors Bureau
Leona Mapuana Kalima,
  Office of Hawaiian Affairs
Robbie Kaholokula,
  Hawaiian Cultural Consultant
Cheryl L. Ka‘uhane-Lupenui,
  Board of Education
Debbie Nakanelua-Richards,
  Hawaiian Airlines
Ramsay Remigius Mahealani Taum,
  Life Enhancement Institute of Hawai‘i
Michael White,
  Kā‘anapali Beach Hotel

Natural Resources

O‘ahu
Honolulu Zoo Discovery Forest
Kahualau
Kilakila o Kanaloa
Loko I’a Fishpond Restoration Project
Mālama nā Honu Educational and Conservation Project #4
Mānoa Falls Trail Improvement Project

Maui
Huliau Environmental Filmmaking Club and Hui Laulima
Kama‘ole Beach Park III Dune Walkovers
Pahana Ho‘ola-Seeds of Hope 2012

Kaua‘i
Kōkē Resource Conservation Program-Trail to Native Diversity-Year 2
Leadership and Empowerment Project

Hawai‘i Island
Volcano Rain Forest Restoration and Education Program

Hawai‘i Island and Maui
Expanding Coral Reef Conservation Impacts in Hawai‘i through the Coral Reef Sustainable Destination Approach

Natural Resources Advisory Group
Nelson L. Ayers,
  Division of Forestry and Wildlife, DLNR
Curt Cottrell,
  Division of State Parks, DLNR
Robert Harris,
  The Sierra Club, Hawai‘i Chapter
Mark Fox,
  The Nature Conservancy of Hawai‘i
Annette Ka‘ohelauli‘i,
  Hawai‘i Ecotourism Association
Vincent Shigekuni,
  PBR Hawai‘i
T. ‘Aulani Wilhelm,
  Papahānaumokuākea Marine National Monument

Brand Experiences

HTA Signature Events
Kona Coffee Cultural Festival, Hawai‘i Island
Kōloa Plantation Days, Kaua‘i
Maui Film Festival at Wailea, Maui
Honolulu Festival, O‘ahu
Pan-Pacific Festival, O‘ahu
Hawai‘i Food and Wine Festival, O‘ahu
Hawai‘i International Film Festival, O‘ahu

HTA Signature Sporting Events
Diamond Head Classic
Hawaiian Islands Invitational Soccer Tournament
Hyundai Tournament of Championship
Ironman World Championship
LPGA Lotte Championship
Mitsubishi at Hualālai
Pacific Links Hawai‘i Championship
Sony Open
Vans Triple Crown of Surfing
Xterra Trail Run World Championship

Pan-Pacific Festival, O‘ahu
Brand Experiences: County Product Enrichment Programs

City & County of Honolulu
10th Annual Waikiki Spam Jam
15th Annual Hale‘iwa Arts Festival
2012 Hawai‘i International Dragon Boat Festival
2012 Hawai‘i State Farm Fair
2012 Hawai‘i Fishing and Seafood Festival
2012 Mānoa Jazz & Heritage Festival
20th Annual Filipino Fiesta
30th Annual Hawaiian Slack Key Guitar Festival
30th Okinawan Festival
10th Annual Kona Chocolate Festival
2012 Haari Boat Festival
20th Annual Pana‘ewa Stampede Rodeo
22nd Big Island Hawaiian Music Festival
2nd Annual Puna Chefs’ and Farmers’ Culinary Festival
2nd Annual Puna Music Festival
2nd half 31st and 1st half 32nd Presenting Season
3rd Annual Volcano Rain Forest Runs “Become Inspired By the Authentic” 93 Park Events for 2012
Big Island Film Festival
Earth & Ocean Festival at Keauhou
Greenwell Garden Guided Hawaiian Plant Walks
Hawai‘i Volcanoes Institute: Inspirational Experiences in the Great Outdoors
Hula Arts at Kīlauea in Hawai‘i Volcanoes National Park
Inspiring Safety through Education … Locally and Globally
Ka‘u Coffee Festival
Marketing of NELHA Presentations and Tours
Mealani A Taste of the Hawaiian Range & Agricultural Festival
Moku O Keawe International Hula Festival
Palace Theater’s 11th Season of Events
Queen Lili‘uokalani Long Distance Races
Royal Footsteps Along the Kona Coast Scenic Byway Interpretive Experience

County of Hawai‘i
10th Annual Kona Chocolate Festival
2012 Haari Boat Festival
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County of Maui
13th Annual Koloa Plantation Days Rodeo
2012 Kaua‘i Mokihana Festival & Cultural Events
2012 Kaua‘i Orchid and Art Festival
20th Annual Hawaiian Slack Key Guitar Festival “Kaua‘i Style”
37th Annual Waimea Town Celebration
5th Annual Red Clay Jazz Festival “E Kanikapila Kākou 2012”
E Pili Kākou I Ho‘okahi Lāhui Festival of Lights
Heiva I Kaua‘i Ia Orana Tahiti 2012
Kaua‘i Polynesian Festival
May Day by the Bay
Prince Kūhiō Celebration of the Arts
The 10th Annual Kaua‘i World Challenge
The 23rd Annual Banana Poka RoundUp
The Coconut Festival Presented by the Kapa‘a Business Association
The Eō E Emalani
The KMF Songwriter Conference
Waimea Music in the Park

Maui Classical Music Festival
Maui Invitational Music Festival (MIMF)
Maui Matsuri
Maui Open Studios
Maui Plein Air Painting Invitational
Maui Pops Orchestra
North South East West Festival
Pursuit of Knowledge (Hana ‘Imi Nā‘auoa) Ho‘olaule‘a
Recalling Hawai‘i 2012 Maui Soaring Voices: Contemporary Japanese Women Ceramic Artists Theatre on the Isle
Wailea Wine & Food Festival
Wailuku First Friday
World Whale Day

County of Kaua‘i
13th Annual Koloa Plantation Days Rodeo
2012 Kaua‘i Mokihana Festival & Cultural Events
2012 Kaua‘i Orchid and Art Festival
20th Annual Hawaiian Slack Key Guitar Festival “Kaua‘i Style”
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Waimea Music in the Park
Communications & Outreach

HTA News Releases

12-1  Airseats to Hawai’i Expected to Rise 3.8 Percent in First Quarter 2012
12-2  HTA Announces Intent to Release RFP for Pre-Visit External Destination Marketing Services for North America and Canada Leisure Market
12-3  HTA Announces Selection of Community and Cultural Programs and Events
12-4  HTA Survey Shows Impact of 2012 Pro Bowl
12-5  Total Visitor Spending for January 2012 Rose to $1.345 Billion, the Highest One-Month Total on Record
12-6  The Hawaiian Islands Take Center Stage at the World’s Largest Flower Show in Philadelphia
12-7  Pro Bowl Generates $25.3 Million for Hawai’i’s Economy
12-8  Japan Airlines Operating Three Charters to Kona in March
12-9  Total Visitor Spending in February 2012 Rose 8.5 Percent While Arrivals Increased 5.6 Percent
12-10 HTA to Issue RFP for Leisure Tourism Destination Marketing Management and Island Support Services
12-11 HTA Awards Funding to Seven (7) Projects in 2012 Under its Kūkulu Ola: Living Hawaiian Culture Program
12-12 HTA Awards Funding to 13 Community-Based Projects Under its Natural Resources Program for 2012
12-13 Total Visitor Spending in March 2012 Rose 18.9 Percent While Arrivals Increased 12.9 Percent
12-14 HTA to Issue RFI for Facilities Management and World-Wide Marketing
12-15 HTA to Issue RFP for Leisure Tourism Destination Representation Services
12-16 Total Visitor Spending in April 2012 Climbed 26.8 Percent While Arrivals Grew 11.3 Percent to A New Record for April
12-17 Total Visitor Expenditures in 2012 Increased 17.5 Percent While Arrivals Grew 12.5 Percent to A New May Record
12-18 Total Visitor Spending Increased 20.4 Percent to A New June Record While Arrivals Grew 11.5 Percent
12-19 HTA Selects Marketing Partner for North America Market
12-20 HTA Selects Marketing Partner for Western Europe Market
12-21 HTA Selects Marketing Partners for North America & Western Europe Markets
12-22 HTA to Hold 2012 Hawai’i Tourism Conference
12-23 HTA Announces New Vice President of Administrative and Fiscal Affairs
12-24 HTA Presents Its 2012 Tourism Legacy Award to Two Organizations that Perpetuate the Hawaiian Culture and Honor Hawai’i’s Ali‘i
12-25 Total Visitor Spending in July 2012 Grew 17.8 Percent While Arrivals Rose 7.8 Percent
12-26 Total Visitor Spending in August 2012 Grew 14.6 Percent; Arrivals Rose 11 Percent
12-27 HTA Board of Directors Appoints Board Chair and New Vice Chair
12-28 HTA Releases RFPs for Product Enrichment Program
12-29 NFL & HTA Designates Pro Bowl Committee
12-30 US Travel Association Honors HTA Marketing Partner for Destiny Award
12-31 HTA Presents Results of 2012 Hawai’i Resident Sentiment Survey
12-32 HTA and JATA Sign Memorandum of Understanding
12-33 Total Visitor Expenditures in September 2012 Rose 15.6 Percent

HTA Media Statements

Jan. 4, 2012  Regarding Increases in Airline Seat Capacity for First Quarter of 2012
Jan. 19, 2012  Regarding President Obama’s Travel and Tourism Announcement
Feb. 16, 2012  Regarding Air Australia’s Flight Suspension
Feb. 24, 2012  Record High January for Hawai’i’s Tourism Economy
Mar. 1, 2012  Regarding Waikiki Beach Restoration
Mar. 29, 2012  Hawai’i’s Tourism Economy Continues in Upward Trend
Apr. 10, 2012  Regarding Allegiant Air’s Announcement on New Service to Hawai’i
Apr. 16, 2012  Regarding Hawaiian Airlines’ New Fukuoka Service
Apr. 26, 2012  Tourism Continues its Growth in First Quarter of 2012 Across the State
May 3, 2012  Regarding the Passage of SB 490, SD3, HD1, CD1
May 21, 2012  Regarding Business Tourism in the Hawaiian Islands
May 30, 2012  Regarding the Return of the NFL Pro Bowl to Hawai’i
May 31, 2012  Record-Breaking April 2012 for Hawai’i’s Tourism Economy
Jun. 12, 2012  Regarding Alaska Airlines’ New Seasonal Service
Jun. 28, 2012  Record High Total Arrivals and Expenditures in May 2012
Jul. 26, 2012  Hawai’i’s Tourism Economy on Pace for Record Year
Aug. 1, 2012  Regarding JetStar’s Announcement on Returning Direct Service between Melbourne and Honolulu
Aug. 7, 2012  Regarding Allegiant Announcement on New Direct Service to Honolulu from Boise and Spokane
Aug. 13, 2012  Regarding Implementation of Auditor’s 2009 Recommendations
Aug. 21, 2012  Regarding Allegiant Announcement on New Direct Service from Mesa, Ariz.
Aug. 21, 2012  Regarding Bill 11
Aug. 29, 2012  Hawai’i Tourism Economy on Pace for Record Year
Sept. 21, 2012  Regarding Southwest Airlines’ Flight Attendant Contract Changes
Sept. 27, 2012  Summer Ends Strong for Hawai’i Tourism Economy
Oct. 2, 2012  Regarding U.S. Waiver Program for Taiwan
Oct. 3, 2012  Regarding Hilton Honors Beach Volleyball Challenge
Oct. 30, 2012  Visitor Expenditures Increase $1.7 Billion for Year-to-Date 2012
## Hawai‘i Tourism Authority
### Fiscal Year 2012 Actuals
#### ($000)

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
<th>Category</th>
<th>Amount</th>
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<tbody>
<tr>
<td><strong>REVENUES</strong></td>
<td></td>
<td><strong>APPROPRIATIONS</strong></td>
<td></td>
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<tr>
<td>TAT Deposits to Tourism Special Fund</td>
<td>$69,000</td>
<td>FY 2012</td>
<td>$87,093</td>
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<tr>
<td>Investment Pool Interest/Miscellaneous Receipts</td>
<td>580</td>
<td><strong>TOTAL REVENUES</strong></td>
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<td><strong>TOTAL APPROPRIATIONS</strong></td>
<td>$87,093</td>
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<td><strong>HTA EXPENDITURES</strong></td>
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<td><strong>DESTINATION BRAND MANAGEMENT</strong></td>
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<td>Community &amp; Special Events</td>
<td>10,311</td>
<td>Leisure Markets</td>
<td>41,941</td>
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<td>Sports &amp; Festival Events (Includes Pro Bowl/PGA)</td>
<td>8,938</td>
<td>Meetings, Conventions &amp; Incentives Costs</td>
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<td>Product Development</td>
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<td><strong>TOTAL HTA EXPENDITURES</strong></td>
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<td>Administrative Costs</td>
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<td><strong>Hawai‘i Convention Center</strong></td>
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<td><strong>REVENUES</strong></td>
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<td><strong>APPROPRIATIONS</strong></td>
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<tr>
<td>TAT Deposits to Convention Center Enterprise Special Fund</td>
<td>$35,637</td>
<td>FY 2012</td>
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<tr>
<td>Convention Center Operations</td>
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<td><strong>TOTAL APPROPRIATIONS</strong></td>
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<td>Subsidy from Tourism Special Fund for Convention Center</td>
<td>3,570</td>
<td><strong>EXPENDITURES</strong></td>
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<td>Sales and Marketing</td>
<td>3,570</td>
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<td><strong>TOTAL REVENUES</strong></td>
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<td>Repair and Maintenance</td>
<td>1,200</td>
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<tr>
<td><strong>TOTAL EXPENDITURES</strong></td>
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<td>HTA Administrative Allocations (Includes Convention Center Insurance)</td>
<td>726</td>
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<tr>
<td><strong>TOTAL APPROPRIATIONS</strong></td>
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<td>Other</td>
<td>194</td>
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<td><strong>EXPENDITURES</strong></td>
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<td><strong>Total Expenditures Prior to Payments on Obligation to</strong></td>
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<tr>
<td>Convention Center Operations</td>
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<td>State Department of Budget &amp; Finance</td>
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### Hawai‘i Convention Center
#### Fiscal Year 2012 Actuals
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“The world will turn to Hawai‘i as they search for world peace because Hawai‘i has the key... and that key is Aloha!”

— Auntie Pilahi Pākī