

# HTA REGULAR BOARD MEETING

Thursday, February 27, 2025

*Hō‘ike‘ike Noi‘i ‘Oihana Ho‘okipa*

Presentation and Discussion of Current Market Insights and  
Conditions in Hawai‘i and Key Major Hawai‘i Tourism  
Markets



STATE OF HAWAII • DEPARTMENT OF BUSINESS,  
ECONOMIC DEVELOPMENT & TOURISM

Jennifer Chun

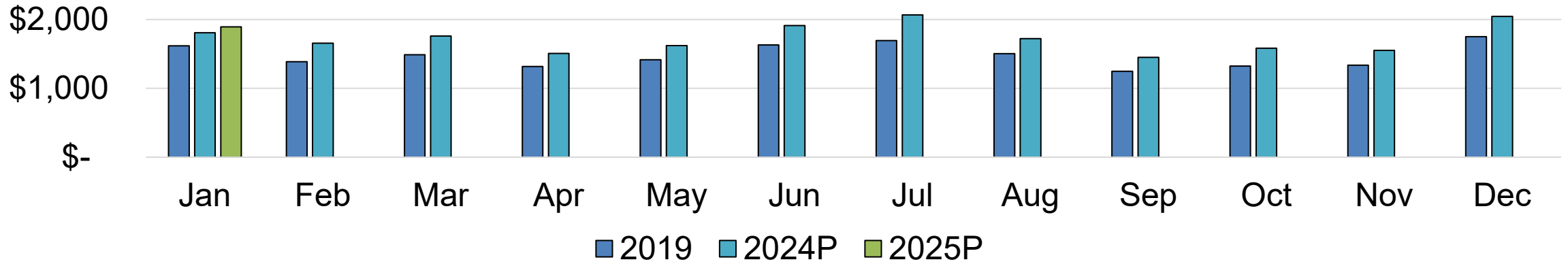
Director of Tourism Research

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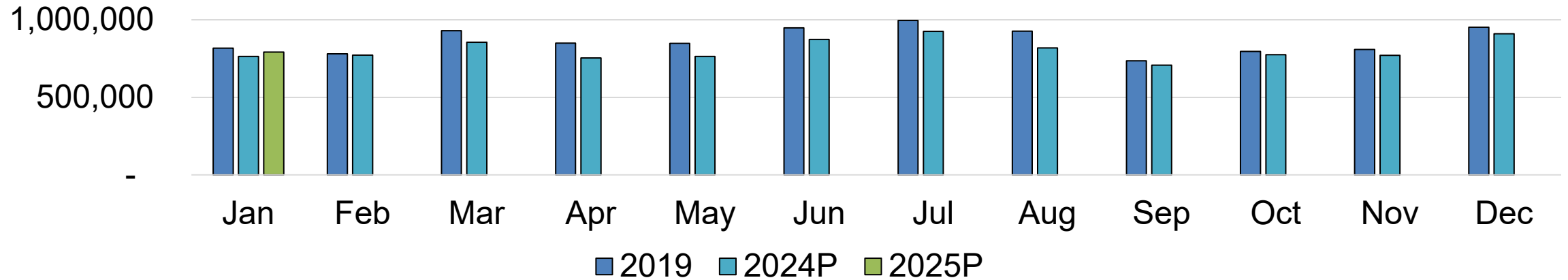
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# January 2025 Highlights – Expenditures and Arrivals

## Monthly Visitor Expenditures (\$millions)



## Monthly Visitor Arrivals



Note: 2024 and 2025 figures are preliminary.

# January 2025 Highlights by Market

EXPENDITURES (\$mil.)	2025P	2024P	2019
TOTAL (AIR)	1,886.2	1,800.8	1,612.9
U.S. West	812.0	768.2	556.7
U.S. East	601.8	579.0	462.9
Japan	83.2	78.8	173.4
Canada	150.0	155.3	165.4
All Others	239.1	219.5	254.5

PPPD SPENDING (\$)	2025P	2024P	2019
TOTAL (AIR)	248.8	242.1	199.7
U.S. West	239.5	231.3	180.0
U.S. East	264.1	261.0	216.2
Japan	248.0	239.7	239.7
Canada	224.8	224.5	167.0
All Others	263.2	250.3	225.6

VISITOR ARRIVALS	2025P	2024P	2019
TOTAL (AIR)	773,149	745,644	805,567
U.S. West	368,123	356,174	317,655
U.S. East	207,519	192,490	185,253
Japan	54,296	52,911	120,418
Canada	54,333	54,002	69,687
All Others	88,878	90,068	112,554

AVERAGE DAILY CENSUS	2025P	2024P	2019
TOTAL (AIR)	244,517	239,949	260,522
U.S. West	109,352	107,164	99,765
U.S. East	73,504	71,568	69,068
Japan	10,826	10,608	23,334
Canada	21,522	22,313	31,962
All Others	29,313	28,296	36,393

Note: 2024 and 2025 figures are preliminary.

# January 2025 Highlights by Island

EXPENDITURES (\$mil.)	2025P	2024P	2019
O'ahu	775.8	734.0	700.2
Maui	531.1	503.8	474.2
Moloka'i	4.1	5.6	2.8
Lāna'i	10.3	10.7	5.8
Kaua'i	259.5	247.3	176.5
Hawai'i Island	305.4	299.4	253.3

PPPD SPENDING (\$)	2025P	2024P	2019
O'ahu	223.5	210.1	194.0
Maui	296.5	304.5	219.0
Moloka'i	213.0	167.4	74.3
Lāna'i	749.6	681.0	269.3
Kaua'i	292.6	275.9	191.2
Hawai'i Island	218.4	222.7	192.1

VISITOR ARRIVALS	2025P	2024P	2019
O'ahu	456,607	450,503	488,441
Maui	202,738	175,005	233,422
Moloka'i	2,843	3,796	5,567
Lāna'i	3,523	3,705	6,425
Kaua'i	111,293	106,048	106,142
Hawai'i Island	158,141	143,033	147,402

AVERAGE DAILY CENSUS	2025P	2024P	2019
O'ahu	111,968	112,697	116,417
Maui	57,778	53,377	69,854
Moloka'i	620	1,082	1,226
Lāna'i	443	507	692
Kaua'i	28,612	28,915	29,784
Hawai'i Island	45,097	43,371	42,548

Note: 2024 and 2025 figures are preliminary.

# January 2025 Highlights – Purpose of Trip

PURPOSE OF TRIP - % Total	Total by Air		US West		US East		Japan		Canada	
	2025P	2019	2025P	2019	2025P	2019	2025P	2019	2025P	2019
Pleasure (Net)	81.9%	82.5%	80.9%	80.5%	76.3%	76.3%	88.9%	87.6%	92.3%	92.9%
Honeymoon/Get Married	3.2%	4.3%	1.9%	2.4%	2.9%	3.5%	10.1%	9.3%	1.5%	2.0%
Honeymoon	2.8%	3.9%	1.5%	1.9%	2.5%	3.1%	10.0%	8.9%	1.5%	1.9%
Get Married	0.5%	0.7%	0.5%	0.6%	0.5%	0.6%	0.8%	1.3%	0.1%	0.2%
Pleasure/Vacation	79.1%	78.6%	79.3%	78.6%	73.8%	73.3%	79.5%	78.7%	91.0%	91.3%
Mtgs/Conventions/Incentive	6.5%	7.3%	5.4%	6.5%	10.4%	10.9%	6.2%	6.6%	4.6%	5.7%
Conventions	4.9%	4.6%	4.1%	4.5%	8.6%	8.0%	1.0%	0.7%	4.3%	3.9%
Corporate Meetings	0.9%	1.3%	0.9%	1.5%	1.4%	1.8%	0.2%	0.1%	0.4%	1.6%
Incentive	0.8%	1.6%	0.5%	0.7%	0.7%	1.4%	5.1%	6.0%	0.1%	0.3%
Other Business	3.1%	3.2%	3.5%	4.7%	4.1%	4.7%	0.4%	0.4%	0.4%	0.8%
Visit Friends/Rel.	9.5%	8.1%	11.0%	11.0%	11.3%	10.8%	3.1%	1.7%	5.4%	3.5%
Gov't/Military	1.2%	1.1%	1.0%	1.1%	2.6%	2.6%	0.1%	0.1%	0.1%	0.0%
Attend School	0.3%	0.4%	0.3%	0.4%	0.4%	0.5%	0.4%	0.1%	0.1%	0.1%
Sport Events	1.5%	0.9%	2.1%	1.2%	1.0%	1.0%	1.4%	0.5%	1.3%	1.3%
Other	3.0%	3.4%	3.1%	3.3%	3.2%	3.0%	3.1%	5.6%	2.0%	1.2%

Note: 2025 figures are preliminary.

# January 2025 Highlights – Accommodation Choice

ACCOMMODATIONS - % Total	Total by Air		US West		US East		Japan		Canada	
	2025P	2019	2025P	2019	2025P	2019	2025P	2019	2025P	2019
Plan to stay in Hotel	58.2%	57.7%	52.1%	47.9%	58.6%	56.8%	78.5%	81.2%	52.0%	40.3%
Plan to stay in Condo	15.2%	18.1%	16.7%	19.9%	13.0%	14.8%	14.6%	13.8%	23.3%	35.0%
Plan to stay in Timeshare	8.0%	7.7%	8.7%	9.1%	8.8%	10.1%	7.8%	5.7%	9.7%	9.5%
Cruise Ship	1.7%	1.3%	0.6%	0.7%	3.4%	3.0%	0.1%	0.4%	1.8%	1.1%
Friends/Relatives	10.5%	9.5%	12.3%	12.7%	11.9%	12.2%	2.3%	1.9%	7.1%	5.6%
Bed & Breakfast	1.0%	1.4%	1.0%	1.4%	1.1%	1.4%	0.0%	0.1%	0.8%	1.8%
Rental House	10.9%	11.0%	12.3%	13.0%	11.6%	11.5%	0.4%	0.4%	12.0%	16.9%
Hostel	0.7%	1.1%	0.6%	0.8%	0.7%	0.8%	0.1%	0.1%	1.4%	2.0%
Camp Site, Beach	0.5%	0.8%	0.6%	0.8%	0.6%	0.8%	0.0%	0.0%	0.7%	1.7%
Private Room in Private Home**	1.3%	1.9%	1.0%	1.7%	0.9%	1.7%	0.3%	0.3%	2.1%	2.6%
Shared Room/Space in Private Home**	0.4%	0.6%	0.4%	0.7%	0.4%	0.6%	0.1%	0.1%	0.3%	0.7%
Other	2.1%	1.6%	2.2%	2.1%	2.6%	2.3%	0.3%	0.0%	1.4%	1.2%

Note: 2025 figures are preliminary.

# January 2025 Highlights - Lodging

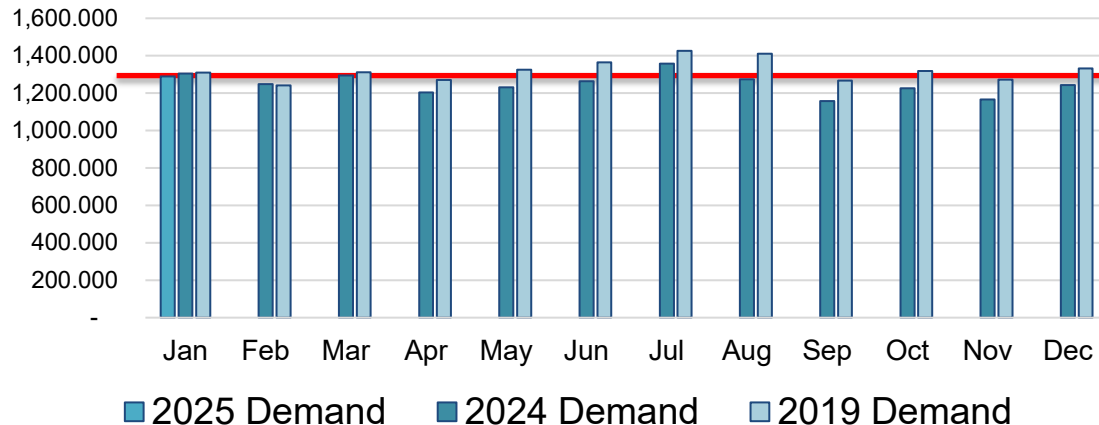
## State of Hawai'i Hotel Performance

	2025	2024	2019
Occupancy	73.9%	75.4%	79.5%
ADR	\$384	\$378	\$298
RevPAR	\$284	\$285	\$237

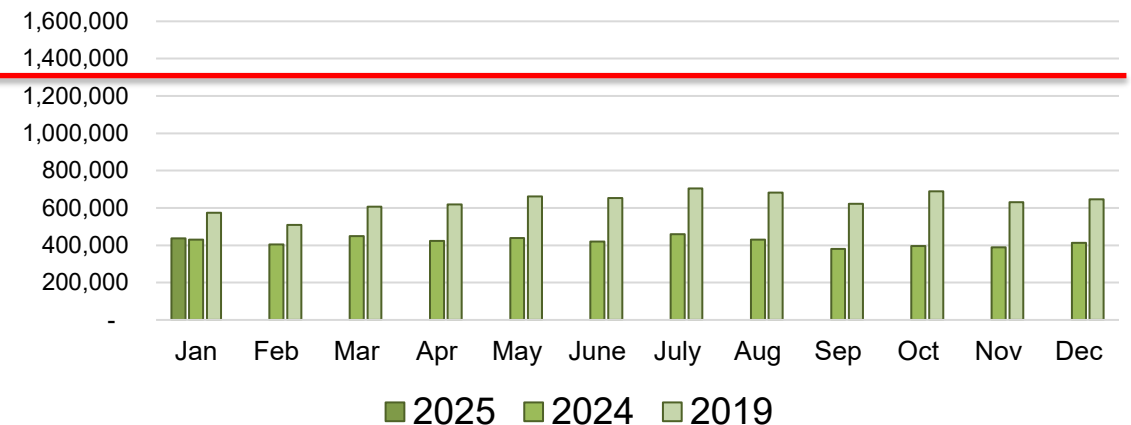
## State of Hawai'i Vacation Rental Performance

	2025	2024	2019
Occupancy	58.9%	59.1%	78.2%
ADR	\$372	\$333	\$218

## State of Hawai'i Hotel Demand



## State of Hawai'i Vacation Rental Demand

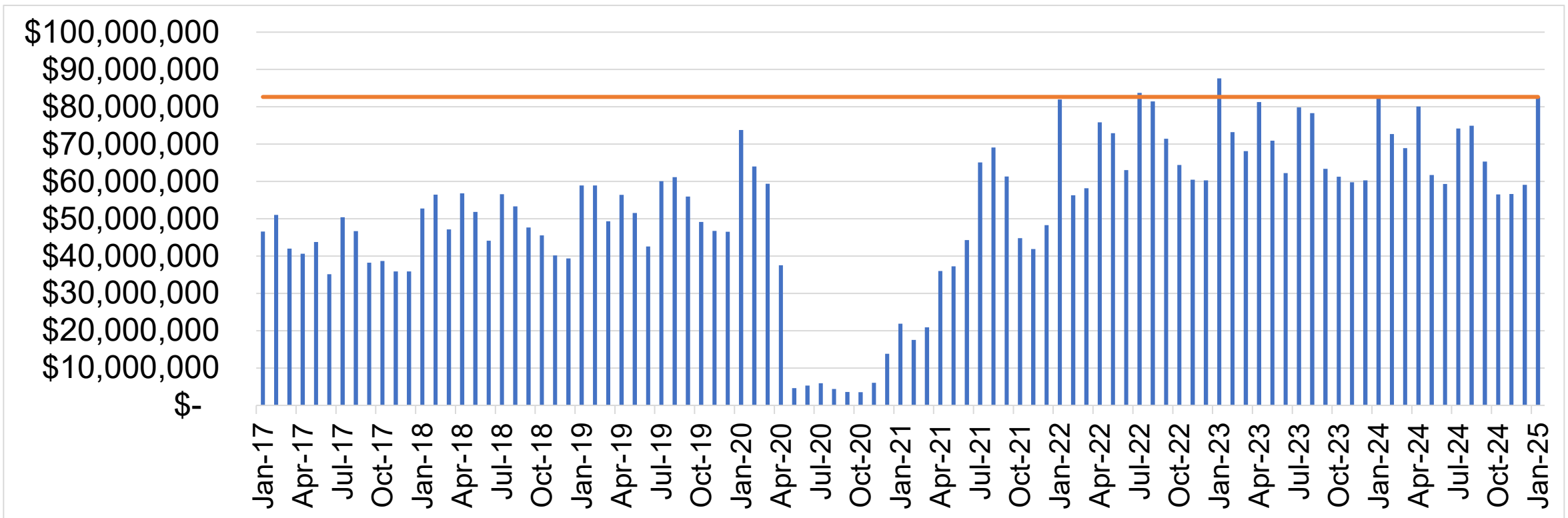


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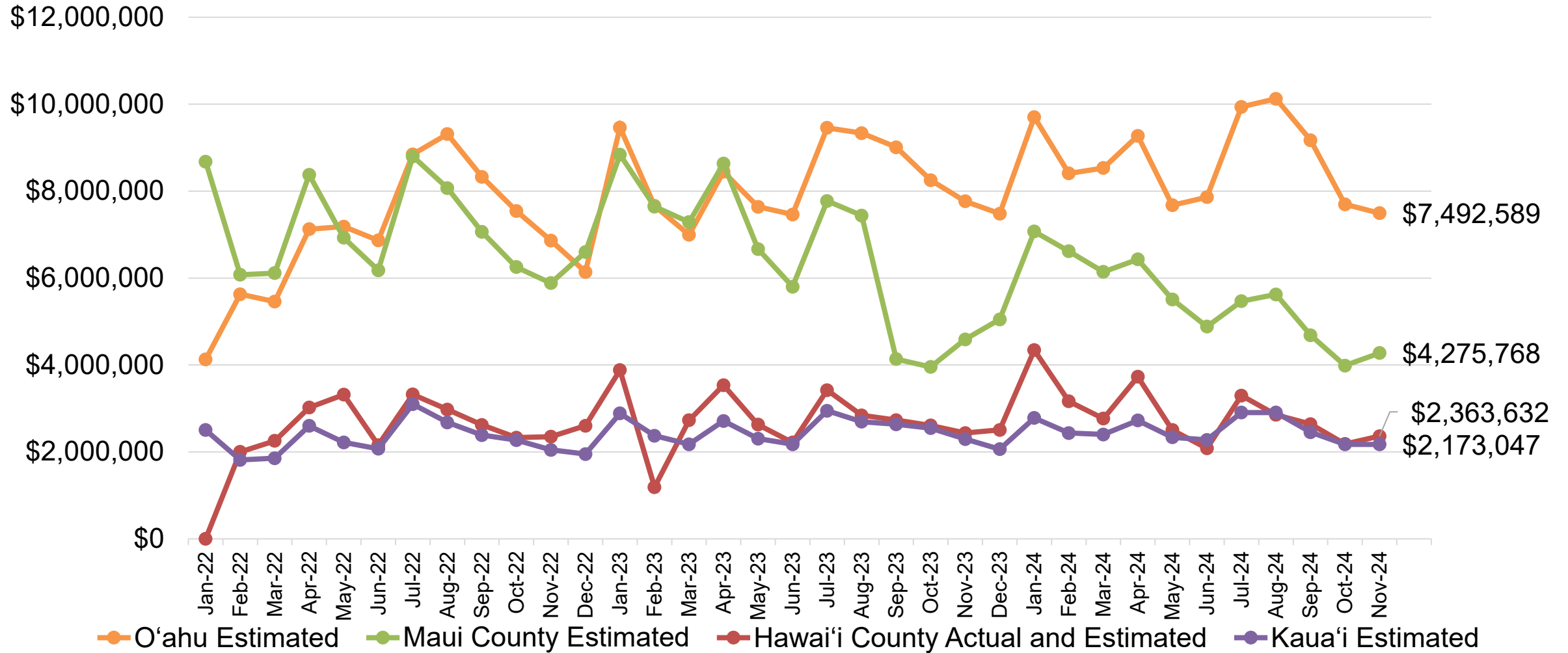
# January 2025 Highlights - State TAT Collections

- Preliminary January 2025 TAT Collections: \$82.6 million
- Preliminary YTD Fiscal 25 TAT Collections: \$469.3 million (-3.3%)
- YTD Fiscal 24 TAT Collections: \$485.5 million (-16.2 million)



Source: Department of Taxation

# Estimated County TAT Collections



Source: Department of Taxation Transient Accommodation Tax Base

# January 2025 Highlights – Hawai‘i Airport Throughput

## Throughput by Week

State: Hawaii; Airport: All



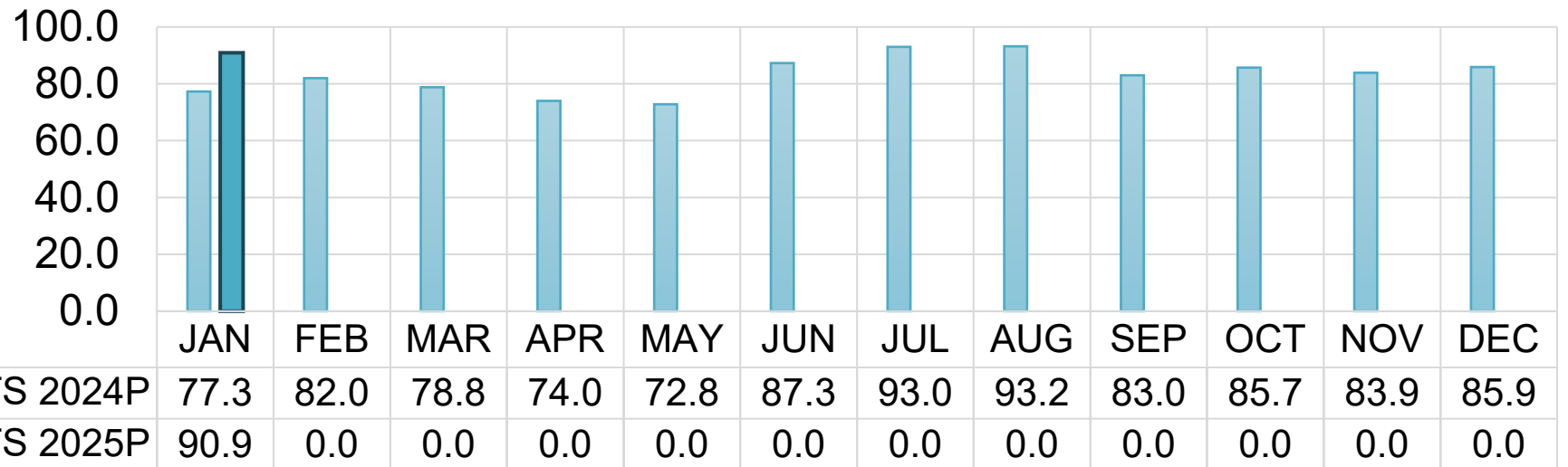
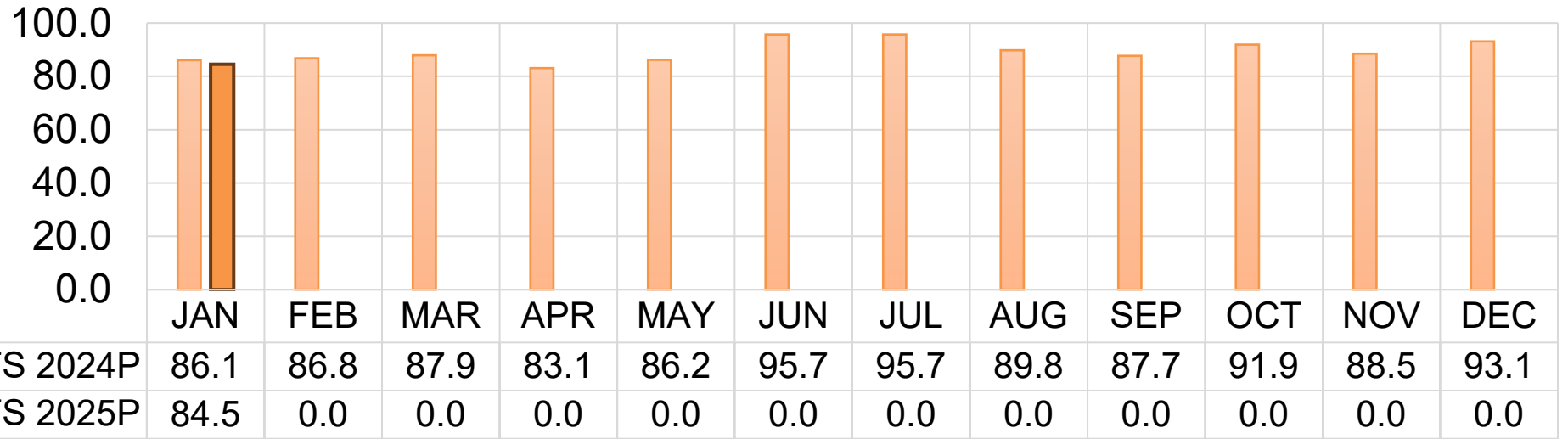
## Hawaii Airports

Throughput for the last 6 months, % change compared to 2024

	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25
All Airports	4%	2%	2%	1%	6%	4%
Daniel K. Inouye International Airport	4%	-2%	0%	-2%	5%	2%
Kahului	20%	44%	20%	11%	13%	8%
Ellison Onizuka Kona International Airport	-5%	-7%	-5%	-1%	1%	4%
Lihue	-6%	-8%	-3%	2%	5%	4%
Hilo International	-1%	-4%	-1%	-3%	1%	2%

Source: Transportation Security Administration by Tourism Economics

# January 2025 Highlights – Load Factors



Note: 2024 and 2025 figures are preliminary.

# Scheduled Nonstop Seats to Hawai'i by Port Entry

January	Total			Domestic			International		
	2025	2024	2019	2025	2024	2019	2025	2024	2019
STATE	1,120,764	1,095,596	1,129,157	887,288	834,351	763,632	233,476	261,245	365,525
HONOLULU	714,822	699,358	696,402	506,699	470,557	388,968	208,123	228,801	307,434
KAHULUI	208,040	209,405	227,818	191,491	188,324	195,030	16,549	21,081	32,788
KONA	116,910	107,230	114,953	110,716	97,955	97,410	6,194	9,275	17,543
HILO	0	0	2,822	0	0	2,822	0	0	0
LIHU'E	80,992	79,603	87,162	78,382	77,515	79,402	2,610	2,088	7,760

February	Total			Domestic			International		
	2025	2024	2019	2025	2024	2019	2025	2024	2019
STATE	1,001,519	1,039,548	1,004,920	791,514	799,692	679,364	210,005	239,856	325,556
HONOLULU	638,531	661,681	618,244	453,034	452,456	345,670	185,497	209,225	272,574
KAHULUI	189,475	201,234	203,181	173,955	180,857	173,414	15,520	20,377	29,767
KONA	101,899	104,968	104,142	95,521	96,802	87,827	6,378	8,166	16,315
HILO	0	0	2,656	0	0	2,656	0	0	0
LIHU'E	71,614	71,665	76,697	69,004	69,577	69,797	2,610	2,088	6,900

Source: DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of February 24, subject to change



# Scheduled Nonstop Seats to Hawai'i by Port Entry

March	Total			Domestic			International		
	2025	2024	2019	2025	2024	2019	2025	2024	2019
<b>STATE</b>	1,204,154	1,176,223	1,185,426	967,916	915,517	836,583	236,238	260,706	348,843
<b>HONOLULU</b>	767,316	743,635	713,111	559,394	519,084	422,760	207,922	224,551	290,351
<b>KAHULUI</b>	238,244	230,701	250,043	220,651	208,510	216,456	17,593	22,191	33,587
<b>KONA</b>	112,044	119,532	124,674	104,453	108,178	106,853	7,591	11,354	17,821
<b>HILO</b>	0	0	3,665	0	0	3,665	0	0	0
<b>LIHU'E</b>	86,550	82,355	93,933	83,418	79,745	86,849	3,132	2,610	7,084

April	Total			Domestic			International		
	2025	2024	2019	2025	2024	2019	2025	2024	2019
<b>STATE</b>	1,095,315	1,073,905	1,098,664	869,696	851,635	777,559	225,619	222,270	321,105
<b>HONOLULU</b>	706,121	691,170	670,423	501,515	492,509	395,313	204,606	198,661	275,110
<b>KAHULUI</b>	204,235	205,617	241,065	189,247	187,143	213,772	14,988	18,474	27,293
<b>KONA</b>	101,312	101,689	103,121	96,505	97,076	89,117	4,807	4,613	14,004
<b>HILO</b>	0	0	3,873	0	0	3,873	0	0	0
<b>LIHU'E</b>	83,647	75,429	80,182	82,429	74,907	75,484	1,218	522	4,698

Source: DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of February 24, 2025, subject to change



# MARKET TRENDS AND INSIGHTS

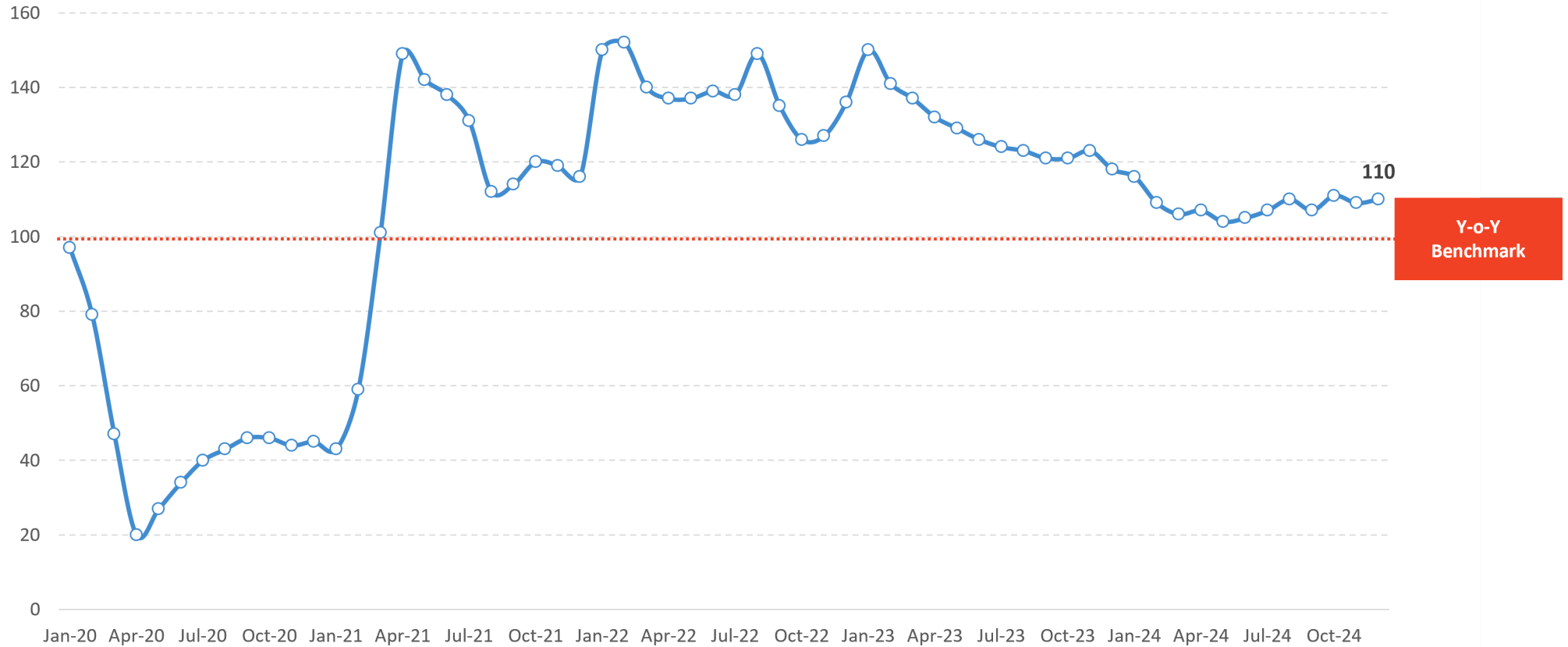


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# Skift Travel Health Index = 110

The Global Travel Health Index Grew Shows 10% Year-on-Year Growth in December 2024  
Weighted Average (Index Benchmarked to the Same Month in the Previous Year)



Source: Skift Research from partner data.

Source: Skift Research



# National Travel Indicators

December, 2024

Compare to Prior Year or 2019  
2019



## Travel Spending\*

(Tourism Economics)

**\$106.1B**

↗ +13.2%

December vs. 2019

↗ +11.2%

YTD vs. 2019



## Air Passengers

(TSA)

↗ +2.9%

December vs. 2019

↗ +3.4%

YTD vs. 2019



## Overseas Arrivals

(NTTO)

↘ -6.8%

December vs. 2019

↘ -13.0%

YTD vs. 2019



## Hotel Demand

(STR)

↗ +0.2%

December vs. 2019

↘ -1.3%

YTD vs. 2019



## Short-term Rental Demand

(AIRDNA)

↗ +35.2%

December vs. 2019

↗ +39.0%

YTD vs. 2019

## Insights

Air passenger volume grew 2.1% year-over-year in 2024.

Overseas arrivals increased by a solid clip of 11.7% in 2024, recovering to 87% of 2019 volumes.

Hotel room demand inched up 0.5% year-over-year to within 1.3% of pre-pandemic levels.

Short-term rental demand has been a key contributor to overall commercial lodging growth since the pandemic, increasing 4.4% in 2024 – 39.0% higher than in 2019.

## Travel Indicators

% change relative to same month vs. 2019

Travel Spending (Tourism Economics)

Air Passengers (TSA)

Overseas Arrivals (NTTO)

Hotel Demand (STR)

Top 25 Group Hotel Demand\*\* (STR)

Short-term Rental Demand (AIRDNA)

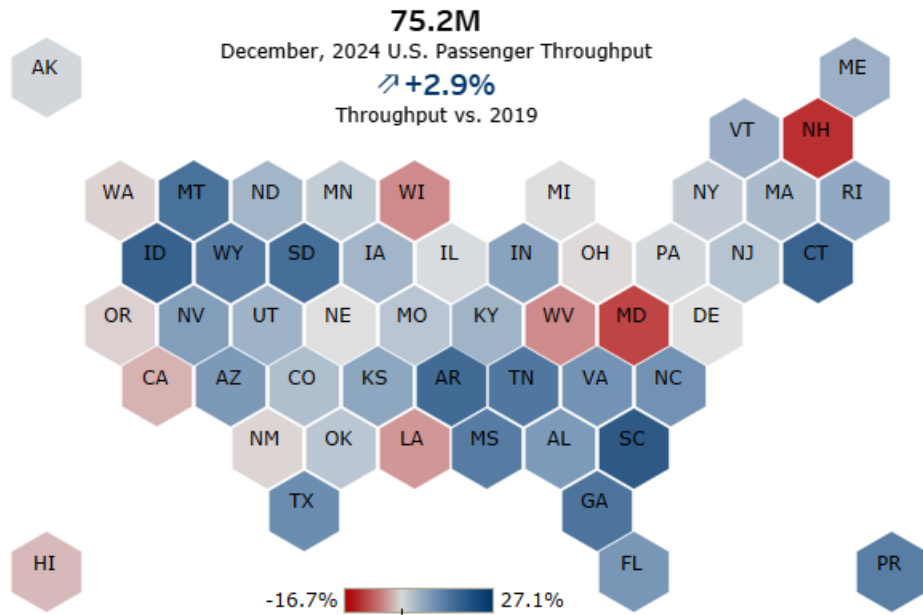
National Park Visits (National Park Service)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Travel Spending (Tourism Economics)	8.1%	9.2%	6.7%	12.7%	13.2%	11.6%	9.8%	10.0%	15.8%	13.2%	11.1%	13.2%
Air Passengers (TSA)	1.5%	6.9%	3.2%	2.9%	4.7%	4.1%	3.7%	1.2%	4.1%	2.8%	2.8%	2.9%
Overseas Arrivals (NTTO)	-17.3%	-13.4%	-6.2%	-20.7%	-13.5%	-16.7%	-14.4%	-11.5%	-12.1%	-10.2%	-12.0%	-6.8%
Hotel Demand (STR)	-0.8%	-0.6%	-2.9%	-0.3%	-0.8%	-1.9%	-3.6%	-3.0%	-1.0%	0.5%	-0.7%	0.2%
Top 25 Group Hotel Demand** (STR)	-3.4%	-2.9%	-1.6%	-2.6%	-0.2%	-1.7%	-2.5%	-3.4%	0.5%	-0.6%	-3.5%	-3.8%
Short-term Rental Demand (AIRDNA)	36.7%	59.6%	42.6%	30.6%	44.7%	48.7%	37.2%	27.6%	29.5%	44.3%	40.9%	35.2%
National Park Visits (National Park Service)	28.1%	21.0%	22.1%	4.5%	-4.6%	-6.1%	-11.0%	-8.7%	-5.8%	2.3%	-3.1%	1.2%

-20.7% 59.6%

## December, 2024 Passenger Throughput by State

All passengers (domestic + international), % change vs. 2019



## Passenger Throughput Trend Comparison

All passengers (domestic + international), Index (2019=100)

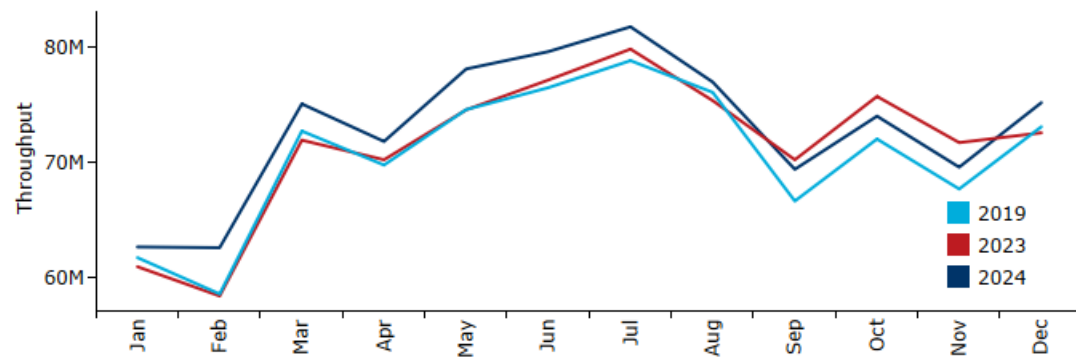
State/Territory Name  
Multiple values

	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24
Arizona	108	119	122	115	122	123	118	116	115	119	119	119	112
California	91	96	98	96	93	97	96	96	92	97	98	96	96
Colorado	98	108	112	107	110	107	107	106	106	106	107	105	105
Illinois	93	101	100	96	97	102	102	103	102	103	100	103	101
Indiana	98	114	114	108	112	110	112	107	109	111	113	113	110
Kentucky	102	109	115	108	112	113	110	110	108	112	106	106	107
Massachusetts	94	103	104	101	102	104	105	107	106	107	110	106	106
Michigan	92	103	107	97	102	102	105	101	103	104	99	99	100
Minnesota	93	105	107	100	105	106	107	109	104	102	103	102	103
Missouri	97	101	108	103	107	106	107	107	105	105	101	103	104
Montana	108	130	133	126	125	131	139	134	136	142	139	131	120
Nevada	109	112	117	111	111	112	110	110	107	110	115	109	111
New Jersey	99	111	114	109	106	108	105	105	104	103	103	104	104
New York	95	102	102	101	96	95	99	101	98	98	101	100	103
North Carolina	103	119	120	121	112	118	117	117	113	116	110	111	113
Oregon	91	96	102	97	101	101	102	101	99	100	102	99	99
Pennsylvania	90	102	104	104	99	102	104	103	104	104	102	99	101
Puerto Rico	115	125	136	126	128	141	141	138	134	132	128	123	118
South Dakota	104	131	132	129	127	119	121	119	122	125	128	132	121
Texas	108	120	119	116	120	120	116	112	111	115	115	115	114
Virginia	101	112	114	112	105	110	107	109	108	112	110	109	113
Washington	91	103	107	99	100	102	104	103	101	104	103	100	99
United States	99	102	107	103	103	105	104	104	101	104	103	103	103



## U.S. Monthly Passenger Throughput

All passengers (domestic + international)

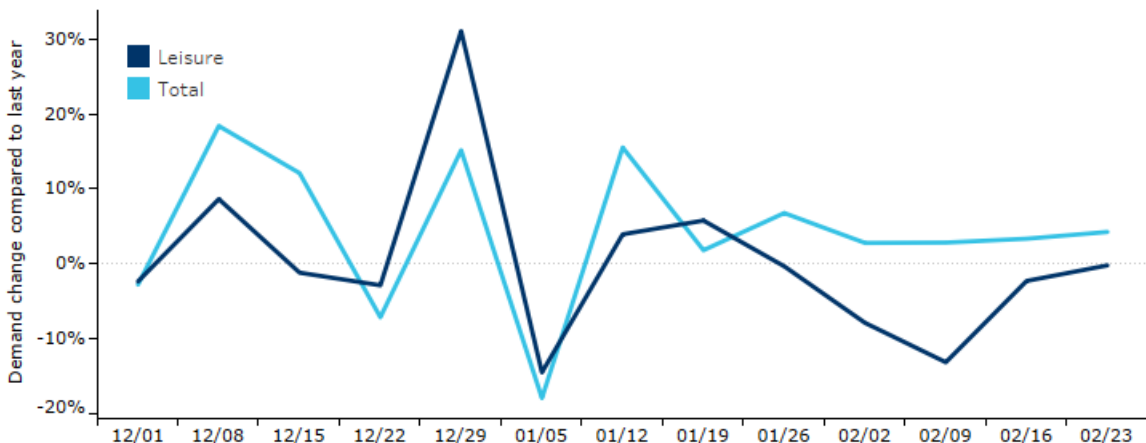


# Domestic Leisure Travel

December, 2024

## U.S. Hotel Leisure Demand Pace

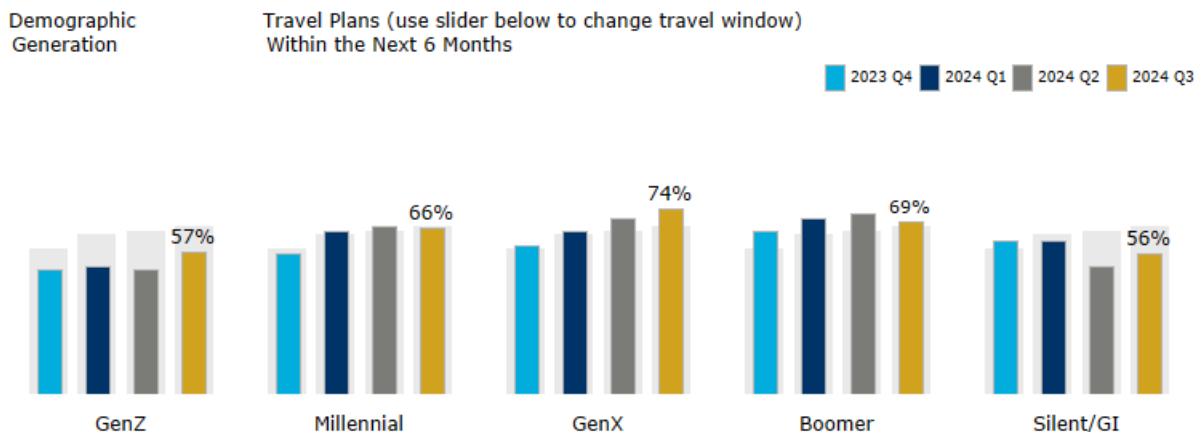
Leisure hotel booking pace vs same time last year, as of 11/18/2024



Source: Amadeus

## Planning Leisure Travel Within the Next 6 Months

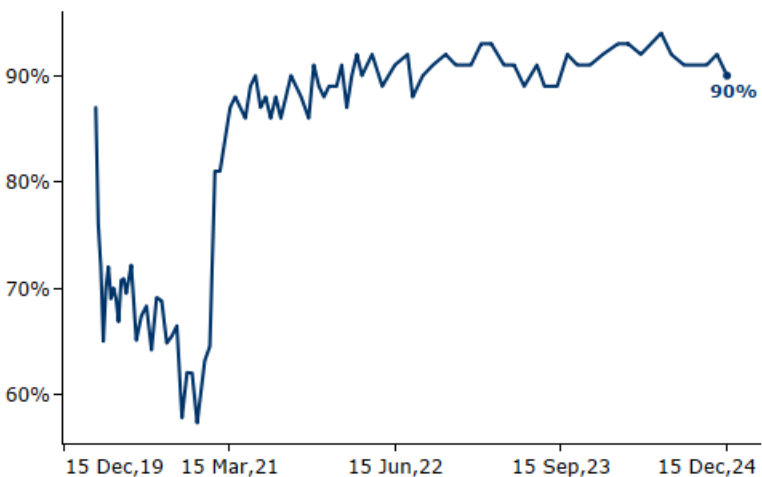
% of American Travelers



Source: MMGY Global's Portrait of American Travelers (released Q3 2024)

## Consumer Travel Sentiment

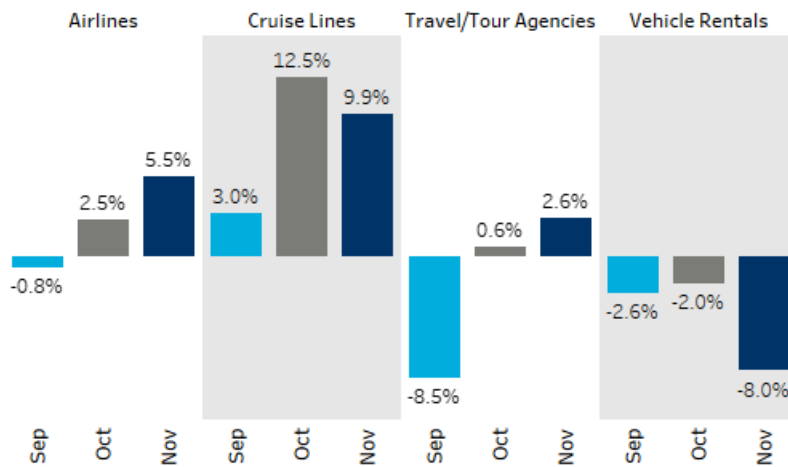
Travelers with Travel Plans in the Next Six Months



Source: Longwoods International

## US Consumer Credit Card Spend

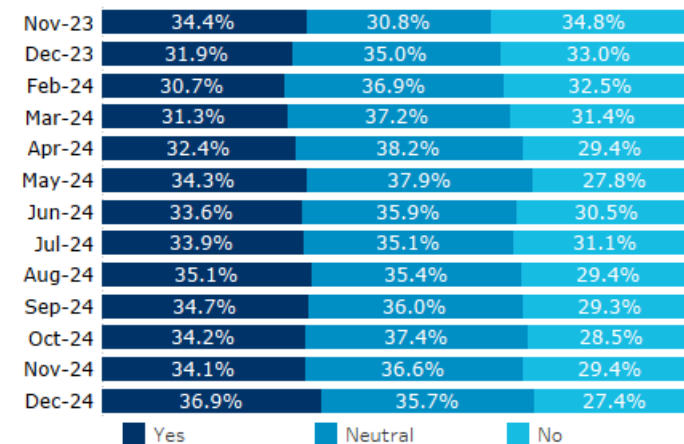
3-month trend, % change YOY



Source: TransUnion

## Consumer Travel Sentiment

Do you feel now is a good or bad time for you to spend money on leisu..



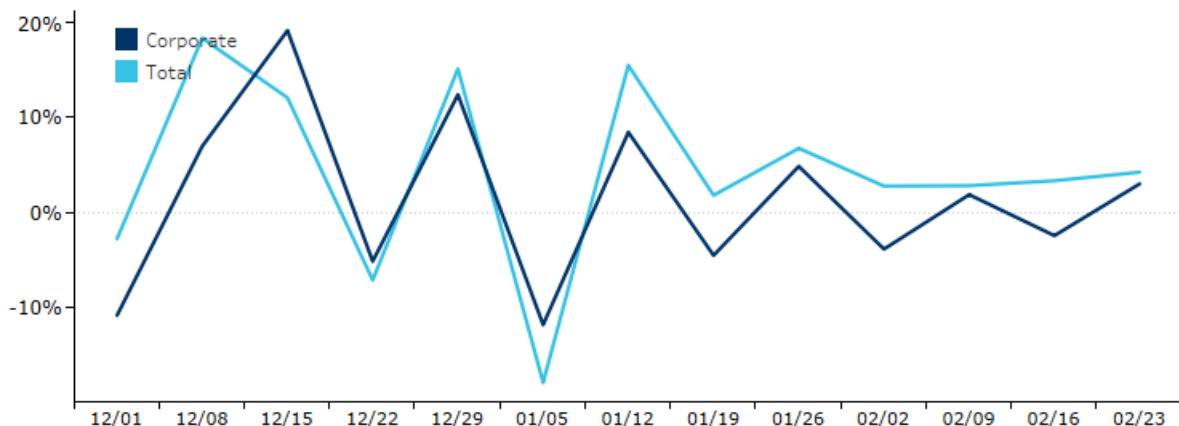
Source: Future Partners

# Domestic Business Travel

December, 2024

## U.S. Hotel Business Demand Pace

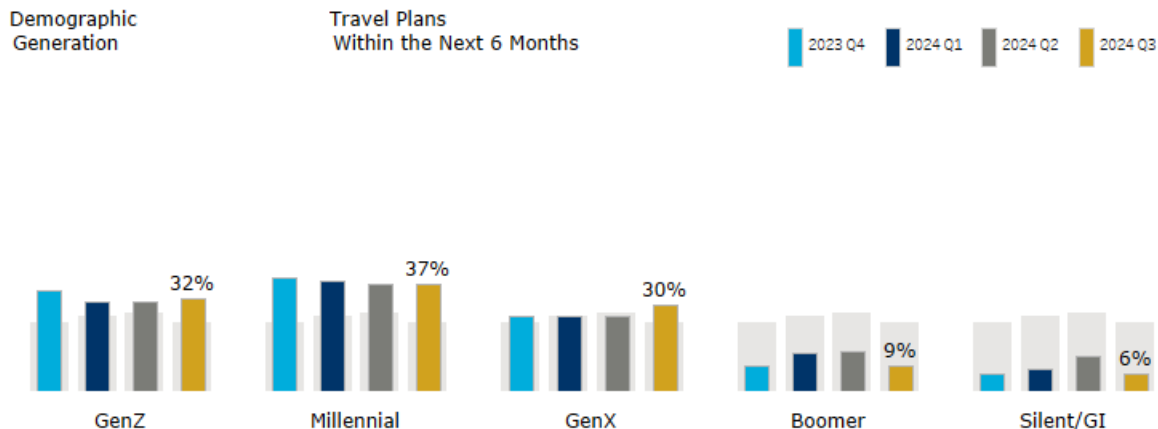
Business hotel booking pace vs same time last year, as of 11/18/2024



Source: Amadeus

## Planning Business Travel Within the Next 6 Months

% of American Consumers



Source: MMGY Global's Portrait of American Travelers (released Q3 2024)

## Business-related Overnight Trips

How many overnight business trips have you taken the past month?



Source: Future Partners

## Business-related Overnight Trips

Percent of all travelers that have taken an overnight business trip in the past month



Source: Future Partners

## Insights

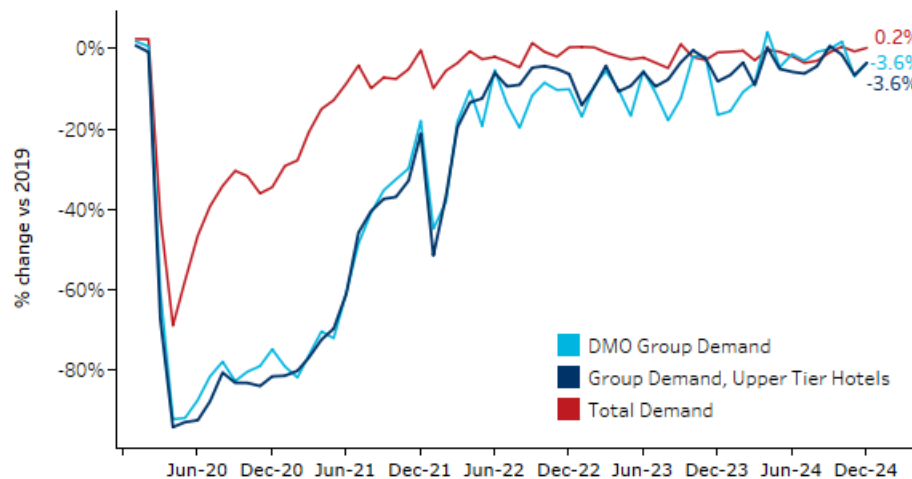
DMO group demand in December improved to 3.6% below 2019 levels, compared to 6.9% below 2019 levels in November.

DMO/CVB pace for room nights on the books as of December 2024 improved from the November readings for the first half of 2025.

The majority of meeting planners (59%) in December were more optimistic about the outlook for recovery.

## Total U.S. Hotel Demand vs Group Demand

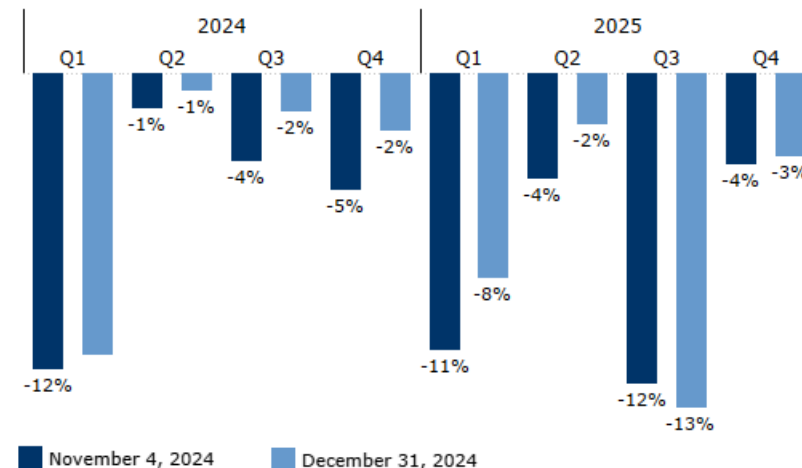
Group demand, % change vs 2019



Source: STR (total demand and top-tier group demand), Simpleview CRM (250+ U.S. DMOs)

## DMO/CVB Room Nights on the Books

Pace for future dates, relative to the same period in 2019



Source: Simpleview CRM (250+ U.S. DMOs)

## Sourcing of Meeting & Event Venues

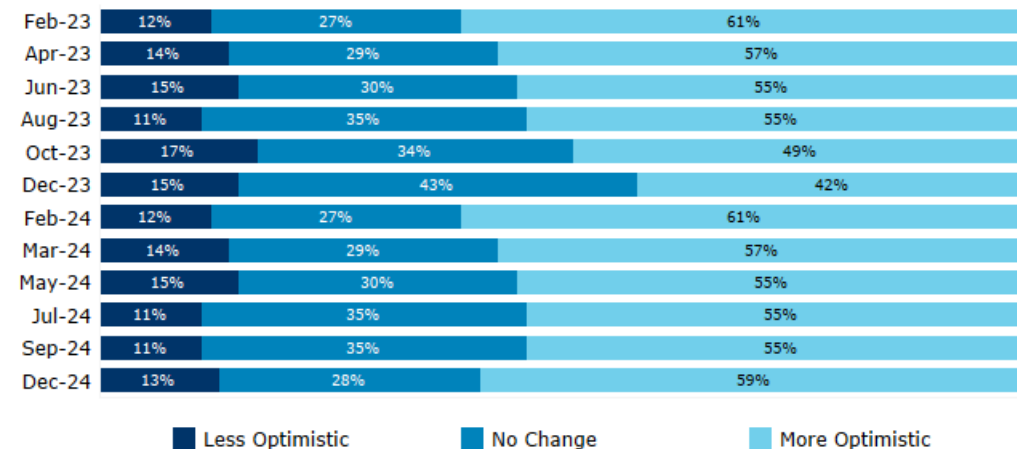
Do you consider any of the following a competitive threat to your meetings and events?



Source: Northstar Meetings Group and Cvent (Meetings industry PULSE survey), as of December 2024

## Meeting Planner Outlook

How the outlook for recovery has changed among meeting planners the past six weeks



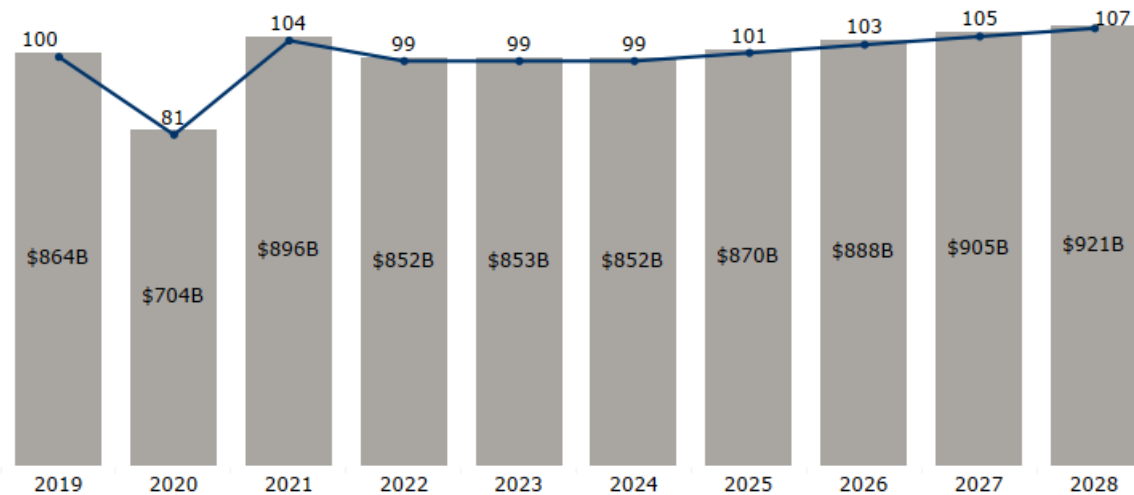
Source: Northstar Meetings Group and Cvent (Meetings industry PULSE survey), as of December 2024

# Domestic Travel Forecast

Forecasted in December, 2024

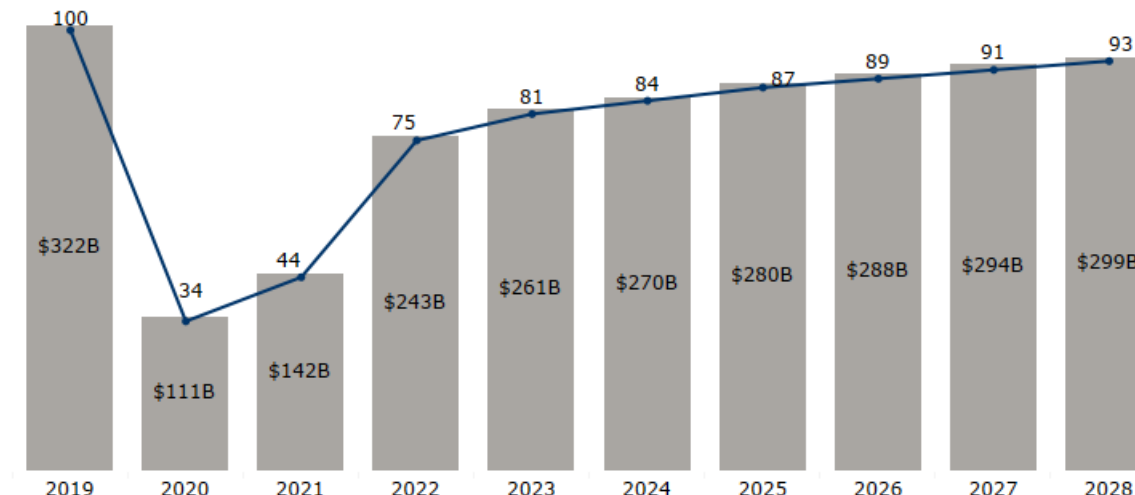
## Real Domestic Leisure Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



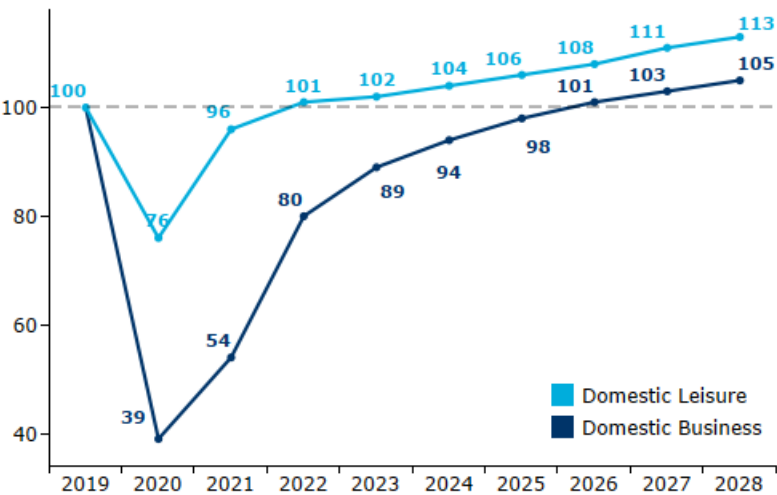
## Real Domestic Business Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



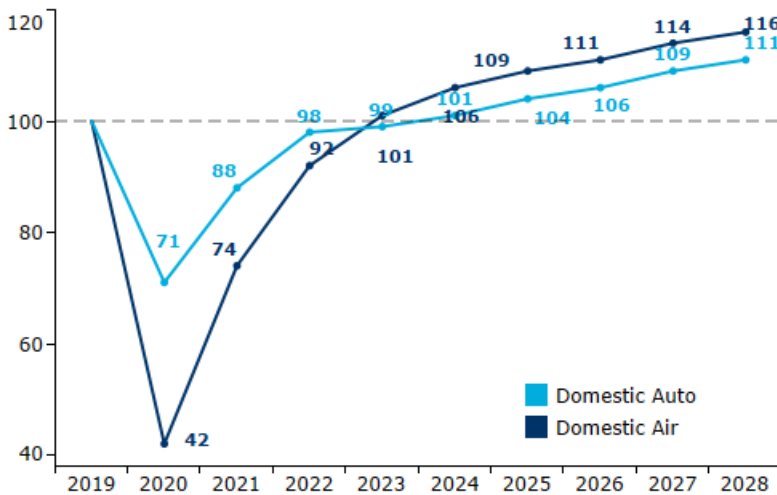
## Leisure vs. Business Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)



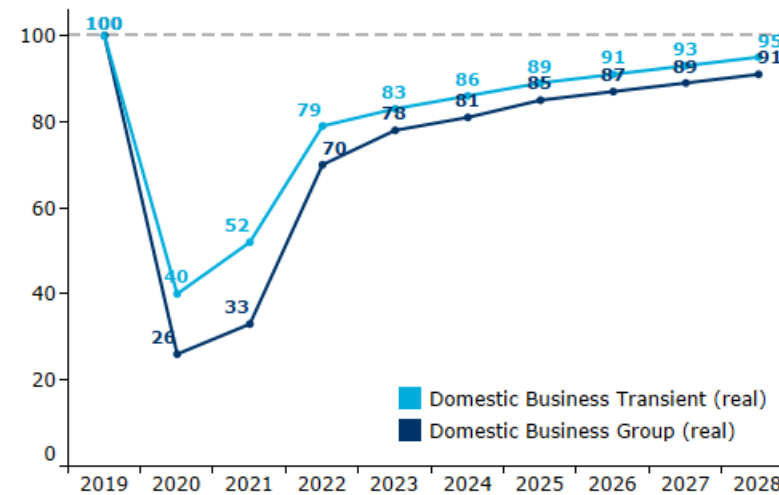
## Auto vs. Air Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)



## Transient vs. Group Business Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



## Agriculture Declaration Form Digitization Pilot Program



### Hawaii Digital Agriculture Declaration Form

From 1973, all travelers coming into the State of Hawaii have been required to complete the Plants and Animals Declaration Form, or more commonly known as the Agriculture Declaration Form.

To simplify this process, the State of Hawaii is exploring the potential of transforming the paper form to fully digital. To assess feasibility of a digital form, certain domestic flights into the State will be utilizing digital forms either before or during flight.

The Pilot Program will run from March 1, 2025 to May 31, 2025.

Success of the digital Agriculture Declaration Form utilization will be assessed during the Pilot Program, and announcements on post-Pilot Program actions should be expected on the Akamai Arrival website and through other communication channels.

If you have any questions regarding Akamai Arrival or the Agriculture Declaration Form Digitization Pilot Program, please contact [akamaiarrival@hawaii.gov](mailto:akamaiarrival@hawaii.gov).

#### Which flights are included in the Pilot Program?

Select flights on all major domestic airline carriers with service to Hawaii will participate in the Pilot Program including: Alaska, American, Delta, Hawaiian, Southwest, and United.

A full list of flights can be found at [www.akamaiarrival.hawaii.gov/pilot](http://www.akamaiarrival.hawaii.gov/pilot).

#### How will the digital form be implemented?

Each airline carrier has unique plans on digital form implementation. Some carriers will be soliciting form completion prior to arrival including check-in reminders and gate announcements while other carriers will ask travelers to complete their form using in-flight Wi-Fi.

Travelers should consult their airline carrier on questions on how the form can be completed.

#### Are there Pilot Program resources for the public?

Yes, please direct any individual with questions on Akamai Arrival or the digital Agriculture Declaration form to:

[www.akamaiarrival.hawaii.gov](http://www.akamaiarrival.hawaii.gov).

- Akamai Arrivals Pilot Program for Digitized Ag Form
- March 1 – May 31, 2025
- Flights: 31.0% of scheduled flights, 28.4% of scheduled air seats (2/26/25)
  - ALL American Airlines flights
  - ALL Southwest Airlines flights
  - 5 Alaska flights
  - 1 Delta flight
  - 2 Hawaiian flights
  - 2 United flights
- No paper forms on Pilot flights
- Does not include any tourism questions
- Impacts
  - Visitor statistics methodology
  - Daily PAX
  - VSAT sampling
  - Defacto Population calculation

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