

HAWAI'I AIR SERVICE UPDATE

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HAWAI'I TOURISM[™]
AUTHORITY

ROUTES AMERICAS 2023

CHICAGO

Scheduled Appointments - Airlines

Air Canada

WestJet

Hawaiian

Norse Atlantic Airways

Alaska

United

Delta

American

Southwest

Breeze

Scheduled Appointments – Airports

DFW International Airport

Calgary Airport Authority

Oakland International Airport

Metropolitan Washington Airports Authority

Phoenix Sky Harbor

Las Vegas – Harry Reid Int’l Airport

Port Authority of NY and NJ

Baltimore/Washington Int’l Airport

Edmonton Int’l Airport

INDUSTRY OVERVIEW



Fuel costs remain variable but are moving in the right direction!

U.S. Airlines Fuel Cost Per Gallon
Scheduled service



Jan 2023
\$3.86/gallon

March 20, 2023
\$2.49/gallon

Fuel Surcharges Impacting Demand – Each Way

as of 3/27/23



Originating Flights on tickets issued March 1-March 31, 2023 to Hawai'i (\$213)
Originating Flights on tickets issued April 1-May 31, 2023 to Hawai'i (\$191)



Originating Flights on tickets issued Dec. 2022-March 31, 2023 to Hawai'i (\$232.2)
Originating Flights on tickets issued April 1 –May 31, 2023 to Hawai'i (\$160.6)



Originating Flights on tickets issued Dec. 2022 –March 31, 2023 to Hawai'i (\$91.8)
Originating Flights on tickets issued April 1-30, 2023 to Hawai'i (\$80.8)



Originating Flights on tickets issued Dec. 2022 –March 31, 2023 to Hawai'i 128,600 KRW (\$99.8)
Originating Flights on tickets issued April 1-30, 2023 to Hawai'i (\$78.61)

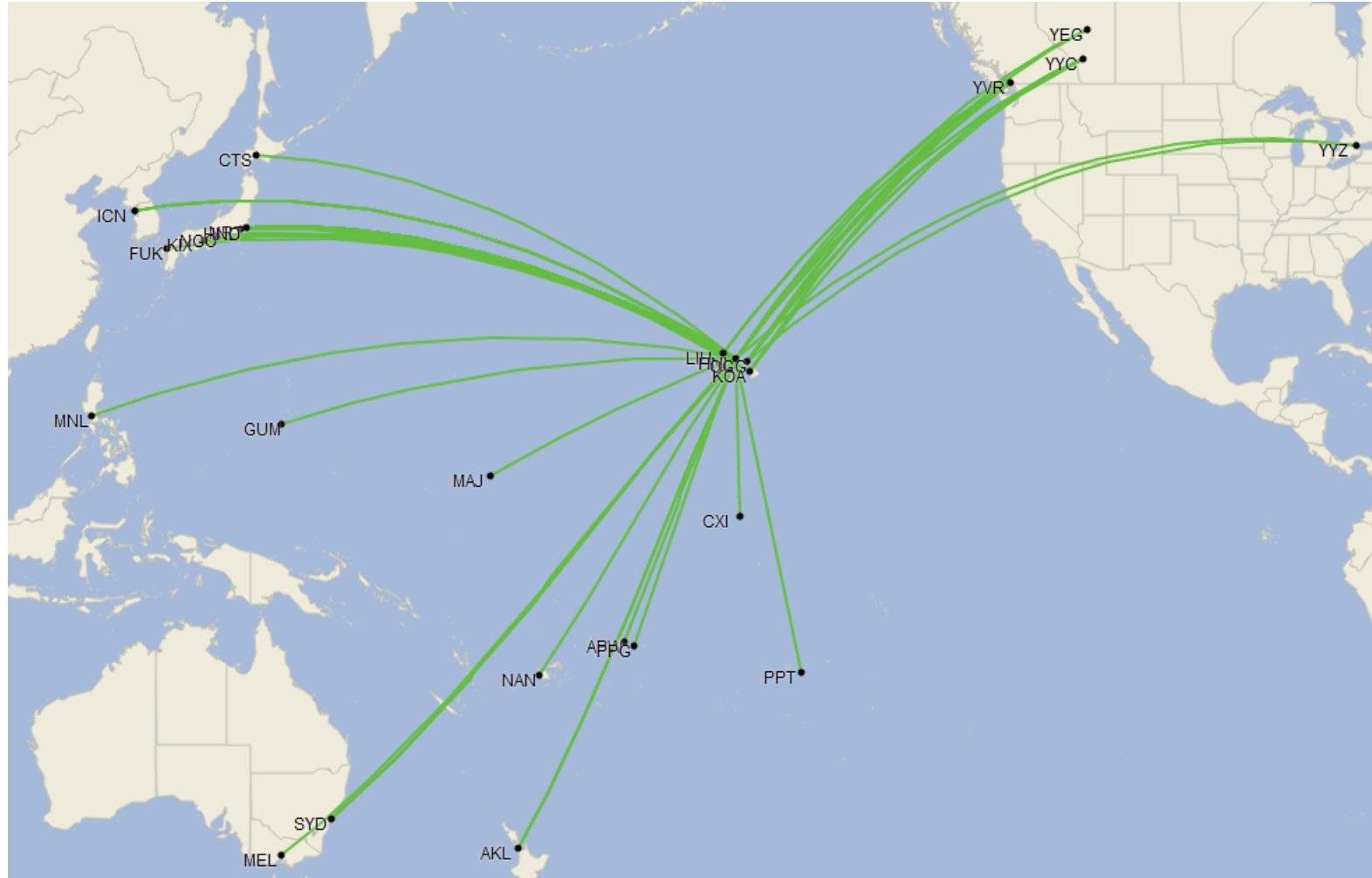
HAWAI‘I SERVICE OVERVIEW

(HISTORIC AND FORECASTED)

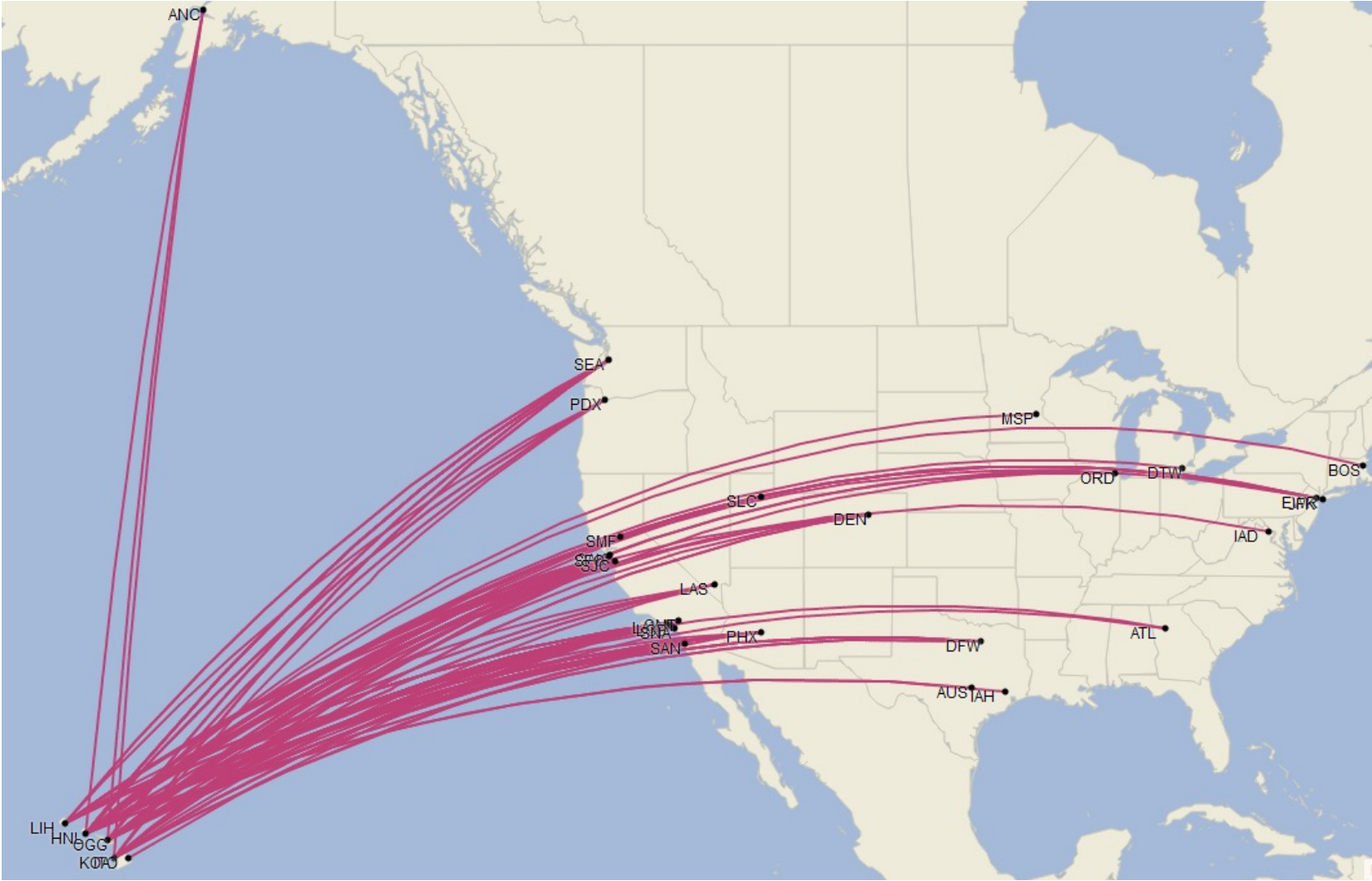
Air Carriers to Hawai'i – 19 Carriers



Non-Stop International Markets into Hawai'i (all airports)



Non-Stop U.S. Markets into Hawai'i (all airports)



SCHEDULED SEATS TO HAWAI'I

Scheduled Non-Stop U.S. Seats to Hawai'i January – June 2019, 2022, 2023P

as of March 25, 2023

	# of SEATS Jan - June 2019	# of SEATS Jan - June 2022	# of SEATS Jan - June 2023P	% Change 23/19	% Change 23/22
O'ahu	2,413,284	2,808,974	2,892,890	19.9%	3.0%
Maui	1,275,965	1,620,331	1,506,530	18.1%	-7.0%
Kona	581,808	678,715	654,507	12.5%	-3.6%
Kaua'i	481,642	581,931	515,569	7.0%	-11.4%
Hilo	21,654	19,993	1,162	-94.6%	-94.2%
Total	4,774,353	5,709,944	5,570,658	16.7%	-2.4%

* A seat scheduled is not a seat flown.

Scheduled Non-Stop U.S. MMA Seats to Hawai'i July - November 2019, 2022, 2023P

as of March 25, 2023

	# of SEATS July-Nov 2019	# of SEATS July-Nov 2022	# of SEATS July-Nov 2023P	% Change 23/19	% Change 23/22
O'ahu	2,092,674	2,266,647	2,365,150	13.0%	4.3%
Maui	1,141,435	1,262,440	1,179,125	3.3%	-6.6%
Kona	424,302	522,046	538,038	26.8%	3.1%
Kaua'i	393,863	469,629	405,535	3.0%	-13.6%
Hilo	21,902	22,958	0	-100%	-100%
Total	4,074,176	4,543,720	4,487,848	10.2%	-1.2%

* A seat scheduled is not a seat flown.

Scheduled Non-Stop Seats By Country to Hawai'i 2019, 2023P

as of March 25, 2023

	# of SEATS 2019	# of SEATS 2023P*	% Change 23/19
Australia	369,282	241,448	-34.6%
Canada	484,613	485,774	0.2%
China	116,539	0	-100%
Cook Islands	0	6,237	+100%
Fiji	8,414	11,220	33.3%
French Polynesia	18,718	14,456	-22.8%
Japan	1,999,204	1,150,835	-42.4%
Kiribati	6,848	6,630	-3.2%

* A seat scheduled is not a seat flown.

Scheduled Non-Stop Seats By Country to Hawai'i 2019, 2023P

as of March 25, 2023

	# of SEATS 2019	# of SEATS 2023P*	% Change 23/19
Marshall Islands	34,448	29,714	-13.7%
New Zealand	125,300	94,274	-24.8%
Philippines	73,248	80,649	10.1%
South Korea	326,398	283,124	-13.3%
Taiwan	39,780	7,038	-82.3%
United States	9,913,374	11,048,919	11.5%
Western Samoa	8,090	8,840	9.3%

* A seat scheduled is not a seat flown.



MAHALO

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