

HAWAII AIR SERVICE UPDATE

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Hawaii Visitors and Convention Bureau

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INDUSTRY OVERVIEW

The airline Industry is in a unique position post-pandemic



Labor shortages including pilots, mechanics and ground staff have limited the ability to grow and have constrained day-to-day operations – not to mention the increased cost to airline P&L



Fuel cost increases, for some carriers > 100% higher versus pre-pandemic, are largely offsetting revenue performance



Record revenues driven by the recovery of leisure traffic and ongoing restoration of business travel demand; Yields (higher fares) are performing well; Transatlantic recovery is doing far better than Transpacific

The airline Industry is in a unique position post-pandemic

U.S. GULF COAST JET FUEL SPOT PRICE
\$USD per gallon



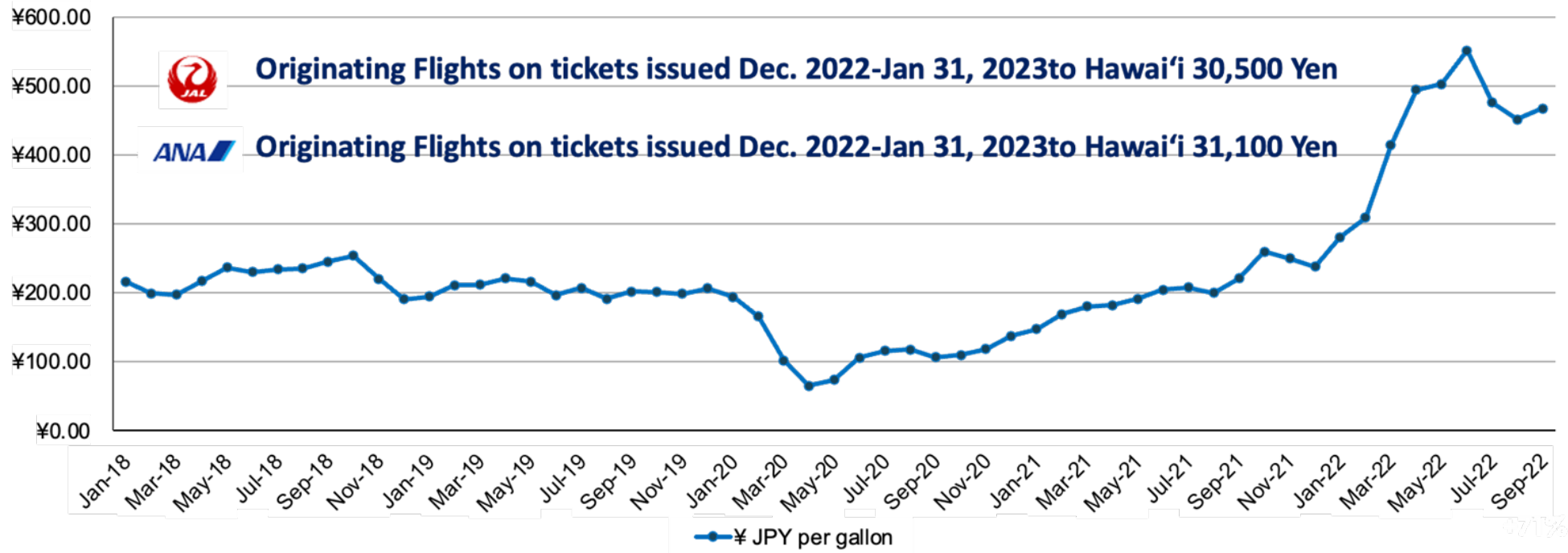
Source: U.S. Energy Information Administration;
Ailevon Pacific Aviation Consulting analysis



Source: Ailevon Pacific

Japan Fuel Surcharges Impacting Demand

Singapore Refined Kerosine Jet Fuel ¥JPY per gallon



If the trailing two-calendar-month average of Singapore Kerosene-type jet fuel price becomes above JPY6,000* per barrel, a surcharge will apply.

WORLD ROUTES 2022

World Routes 2022 - October 15-18th

16 Airline Meetings with 25 Representatives

Fiji Airways	Omni
JAL	Miat Mongolian
American	Sun Country
Air New Zealand	ANA
British Airways	Southwest
WestJet	Delta
Hawaiian	Air Asia X
Alaska	Qantas

11 Airport Meetings with 17 Representatives

Metropolitan Washington Airport Authority
Sydney Airport Corporation
Melbourne Airport
Atlanta Hartsfield Jackson
DFW-Dallas- Fort Worth
Oakland International
LAX- Los Angeles World Airports
Mactan-Cebu/Philippine Dept. of Tourism
Vancouver International
Edmonton Airport
Ontario Airport

HAWAI‘I SERVICE OVERVIEW

(HISTORIC AND FORECASTED)

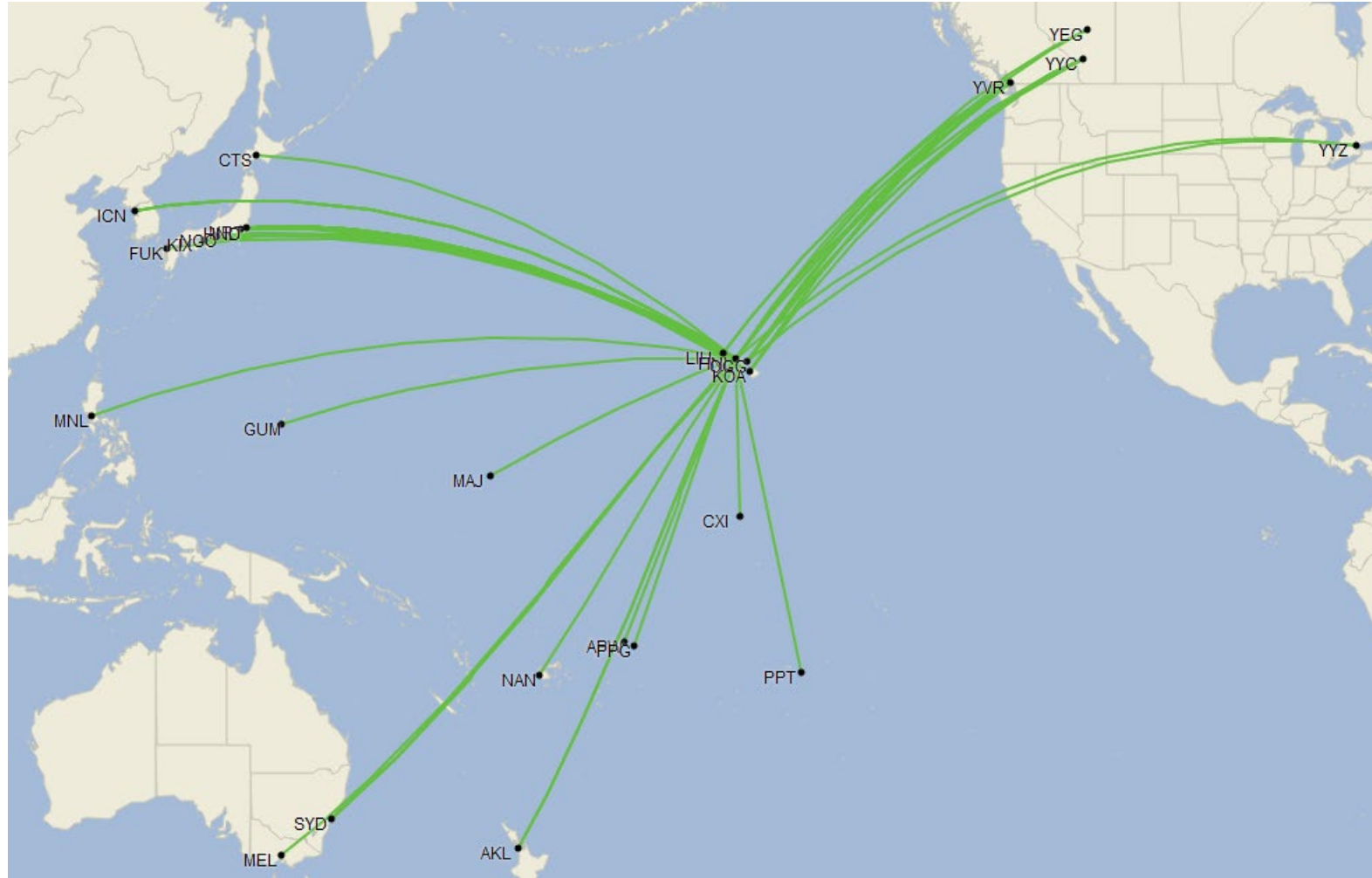
Air Carriers to Hawai'i



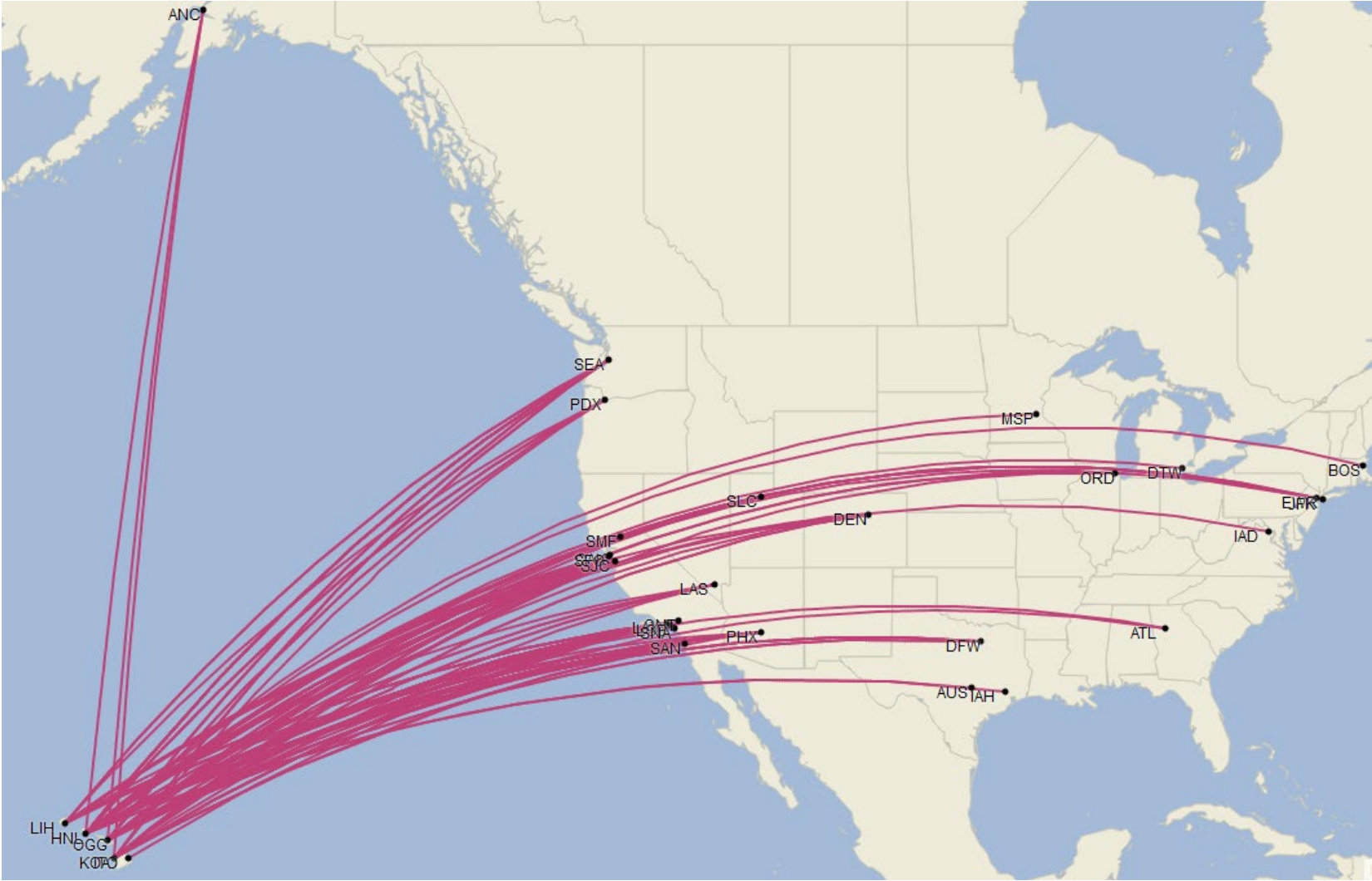
2022P Scheduled Non-Stop Seats into Hawai'i (all airports) by Airline

Airline	Seats	Flights
Hawaiian Airlines	3,045,940	12,784
United Airlines	2,862,864	12,304
Southwest Airlines	1,867,250	10,670
Alaska Airlines	1,526,112	9,206
American Airlines	1,300,182	5,980
Delta Air Lines	1,137,930	5,090
WestJet	260,826	1,353
Air Canada	226,389	1,120
Japan Airlines Co., Ltd.	183,833	886
Korean Air Lines	101,258	285
All Nippon Airways Co. Ltd.	93,394	305
Jetstar Airways	72,025	215
Qantas Airways Ltd.	64,152	216
Philippine Airlines	55,620	180
Asiana Airlines	52,419	175
ZIPAIR Tokyo Inc.	37,182	190
Air New Zealand Limited	23,404	80
Fiji Airways	11,318	67
TOTAL	12,922,098	61,106

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



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



Highlights of additional service

November/December 2022

Atlanta –Maui on Delta

New York JFK – Honolulu on Delta

Detroit – Honolulu on Delta

March 2023

Fukuoka – Honolulu on Hawaiian

Osaka-Kansai – Honolulu on Air Asia X

Tokyo HND – Honolulu on Delta

Tokyo NRT - Honolulu on United

April 2023

Sapporo – Honolulu on Hawaiian

May 2023

Cook Islands/Rarotonga – Honolulu on Hawaiian



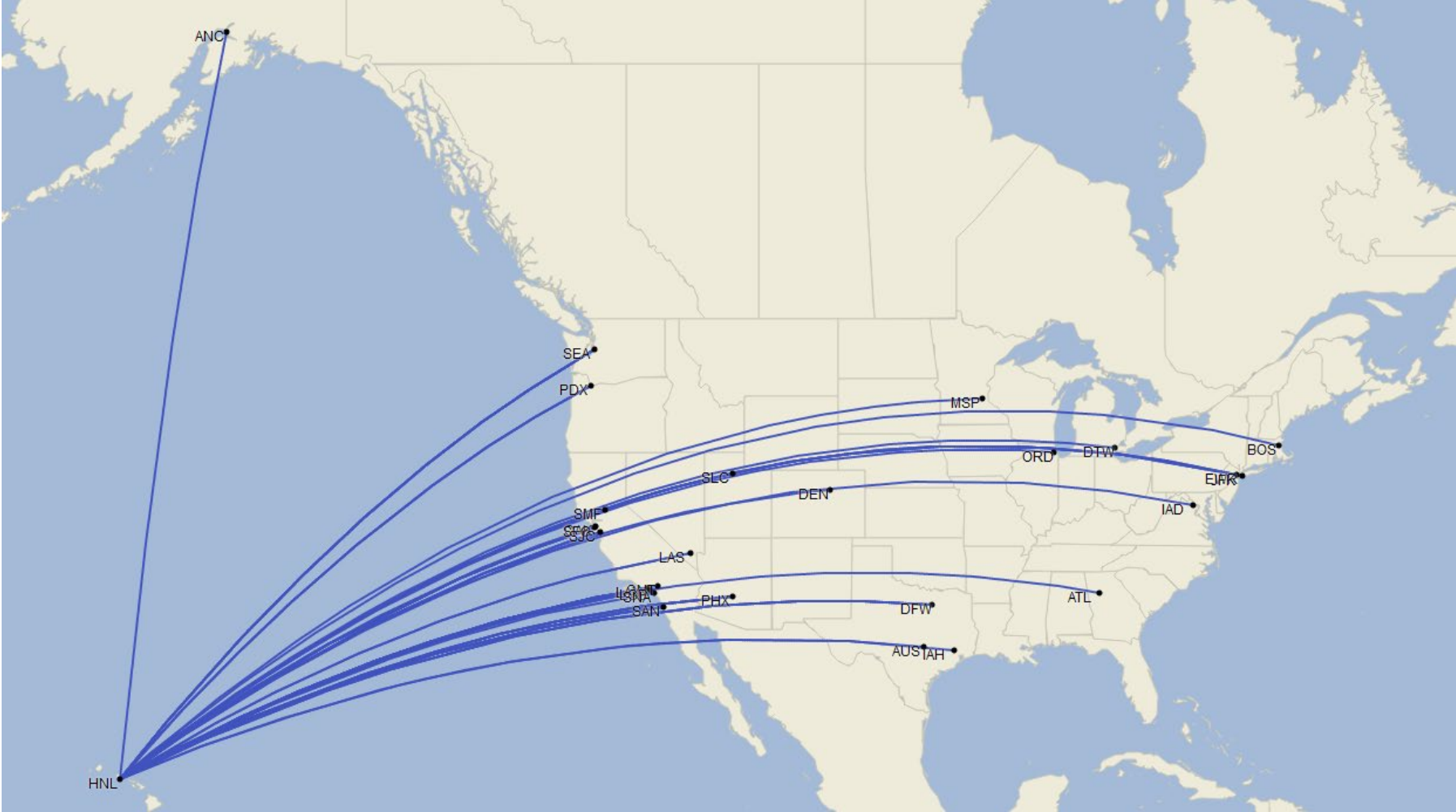
Non-Stop Origins into Honolulu (HNL)

Anchorage, AK, US
Atlanta, GA, US
Auckland, NZ
Calgary, AB, CA
Chicago-O'Hare, IL, US
Dallas/Fort Worth, TX, US
Denver, CO, US
Detroit, MI, US
Fukuoka, JP
Guam, TR, US
Houston-Intercontinental, TX, US
Kiritimati, KI
Las Vegas, NV, US
Long Beach, CA, US
Los Angeles, CA, US
Majuro, MH
Melbourne, VI, AU
Minneapolis/St. Paul, MN, US
Nagoya, JP
New York-JFK, NY, US

Newark, NJ, US
Oakland, CA, US
Ontario, CA, US
Osaka-Kansai, JP
Phoenix, AZ, US
Portland, OR, US
Sacramento, CA, US
Salt Lake City, UT, US
San Diego, CA, US
San Francisco, CA, US
San Jose, CA, US
Sapporo, JP
Seattle, WA, US
Seoul, KR
Sydney, NS, AU
Tokyo-Haneda, JP
Tokyo-Narita, JP
Vancouver, BC, CA
Washington-Dulles, VA, US

Total: 39

Non-Stop U.S. Markets into Honolulu (HNL)



Source: DiiO Mii

Non-Stop Origins into Kahului/Maui (OGG)

Anchorage, AK, US*	Phoenix, AZ, US
Atlanta, GA, US*	Portland, OR, US
Calgary, AB, CA*	Sacramento, CA, US
Chicago-O'Hare, IL, US	Salt Lake City, UT, US*
Dallas/Fort Worth, TX, US	San Diego, CA, US
Denver, CO, US	San Francisco, CA, US
Edmonton, AB, CA*	San Jose, CA, US
Las Vegas, NV, US	Seattle, WA, US
Long Beach, CA, US	Toronto, ON, CA*
Los Angeles, CA, US	Vancouver, BC, CA
Newark, NJ, US*	
	Total: 21

Non-Stop Origins into Kahului/Maui (OGG)



Non-Stop Origins into Kona/Hilo (KOA/ITO)

Anchorage, AK, US

Calgary, AB, CA*

Chicago-O'Hare, IL, US

Denver, CO, US

Las Vegas, NV, US

Los Angeles, CA, US - Kona

Los Angeles, CA, US – Hilo Ends Jan 7th

Oakland, CA, US

Phoenix, AZ, US

Portland, OR, US

San Diego, CA, US

San Francisco, CA, US

San Jose, CA, US

Seattle, WA, US

Tokyo-Haneda, JP

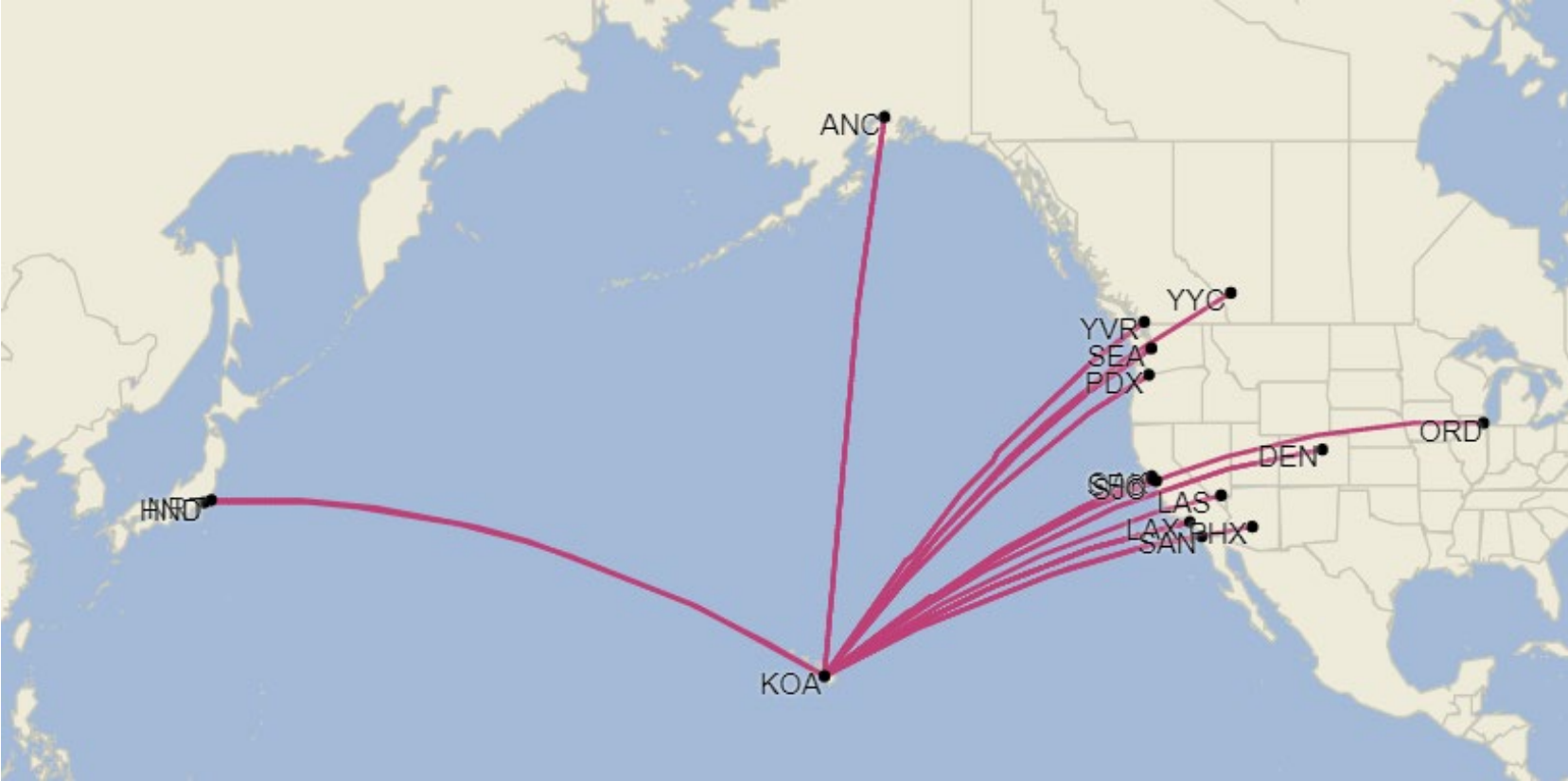
Tokyo-Narita, JP

Vancouver, BC, CA*

Total 16 (KOA)

Total 1 (ITO)

Non-Stop Origins into Kona/Hilo (KOA/ITO)



Non-Stop Origins into Līhu'e (LIH)

Denver, CO, US

Las Vegas, NV, US

Los Angeles, CA, US

Oakland, CA, US

Phoenix, AZ, US

Portland, OR, US*

San Diego, CA, US

San Francisco, CA, US

San Jose, CA, US

Seattle, WA, US

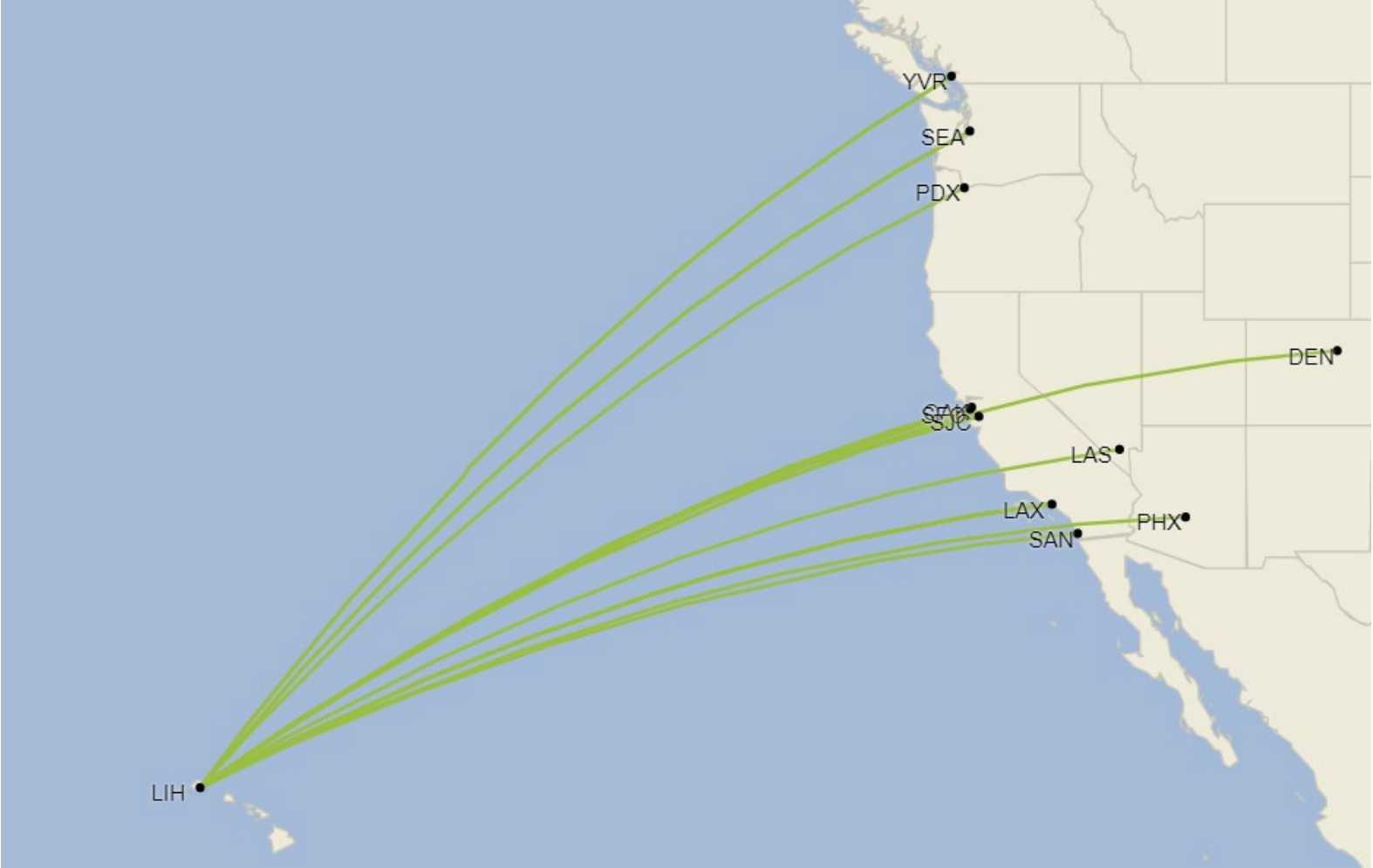
Vancouver, BC, CA

Total 11



** Seasonal*

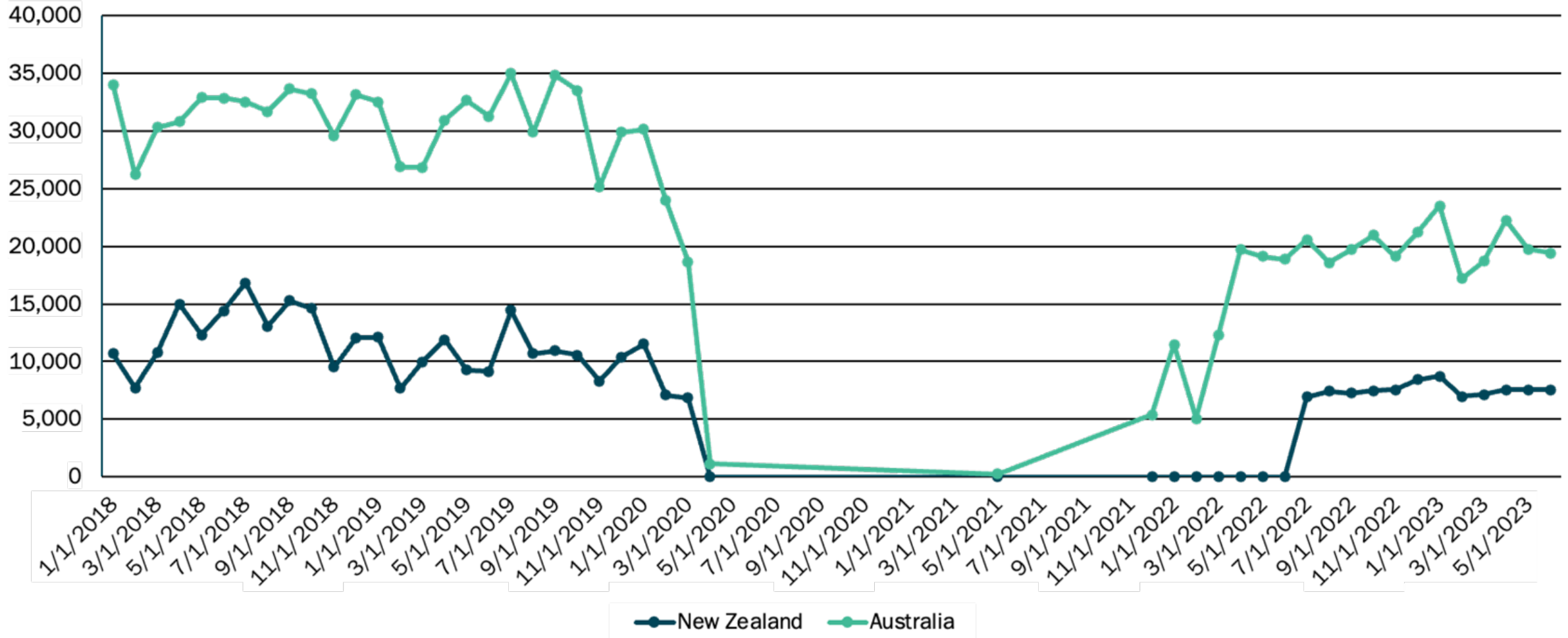
Non-Stop Origins into Līhu'e (LIH)



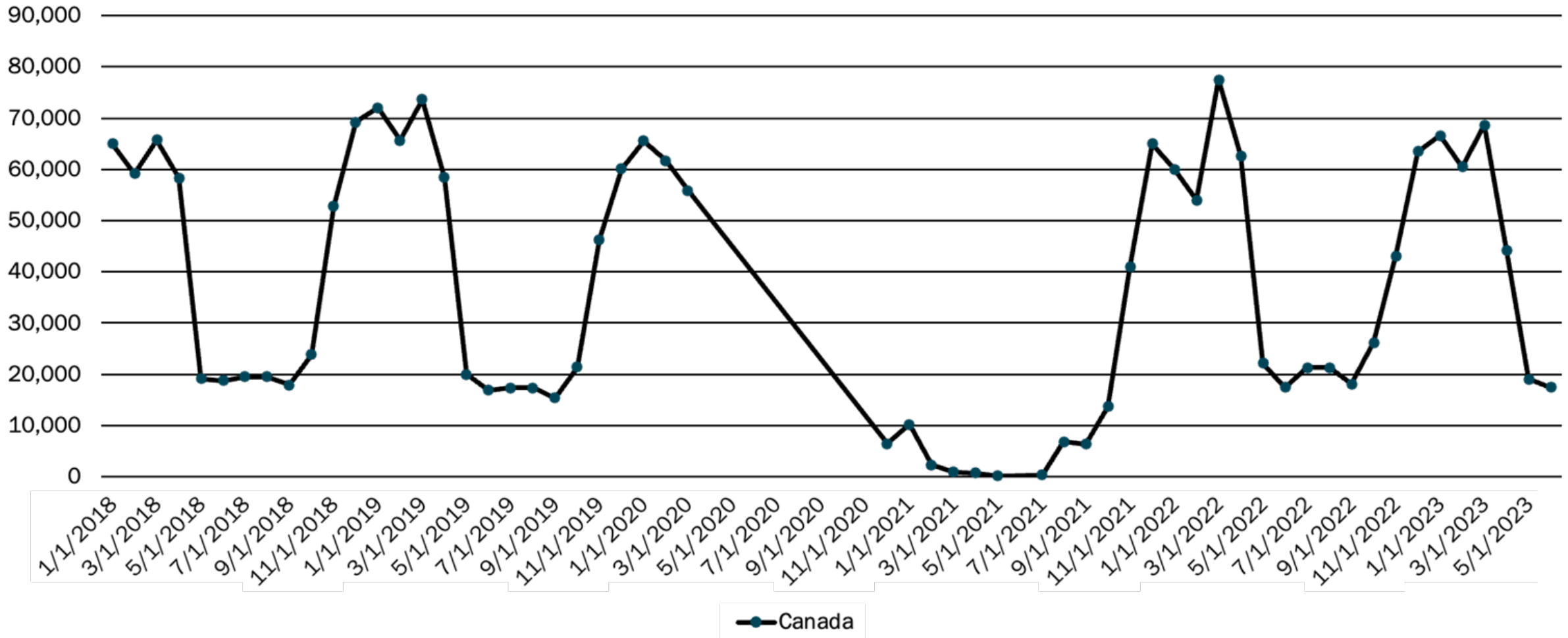
HISTORIC SEATS BY MARKET

(BY MONTH MARCH 2018-JUNE 2023)

Australia & New Zealand Seats 2018-2023



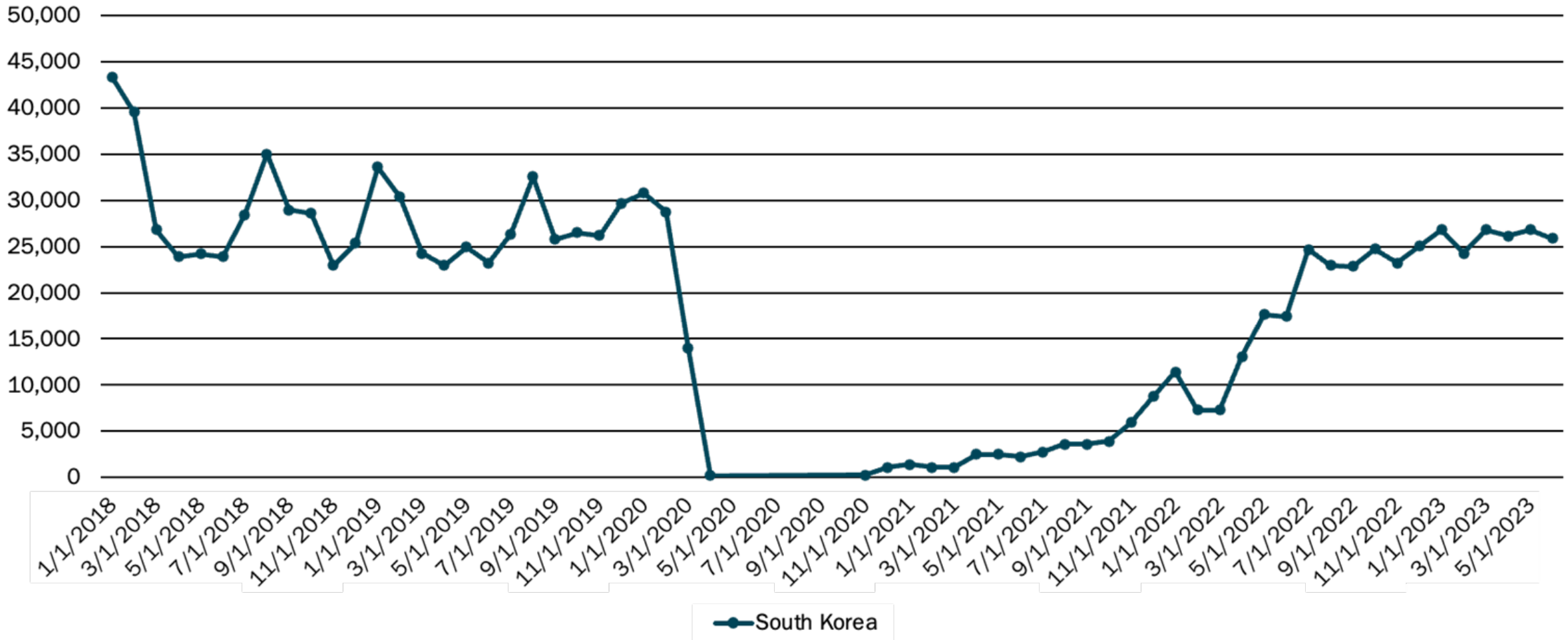
Canada Seats 2018-2023



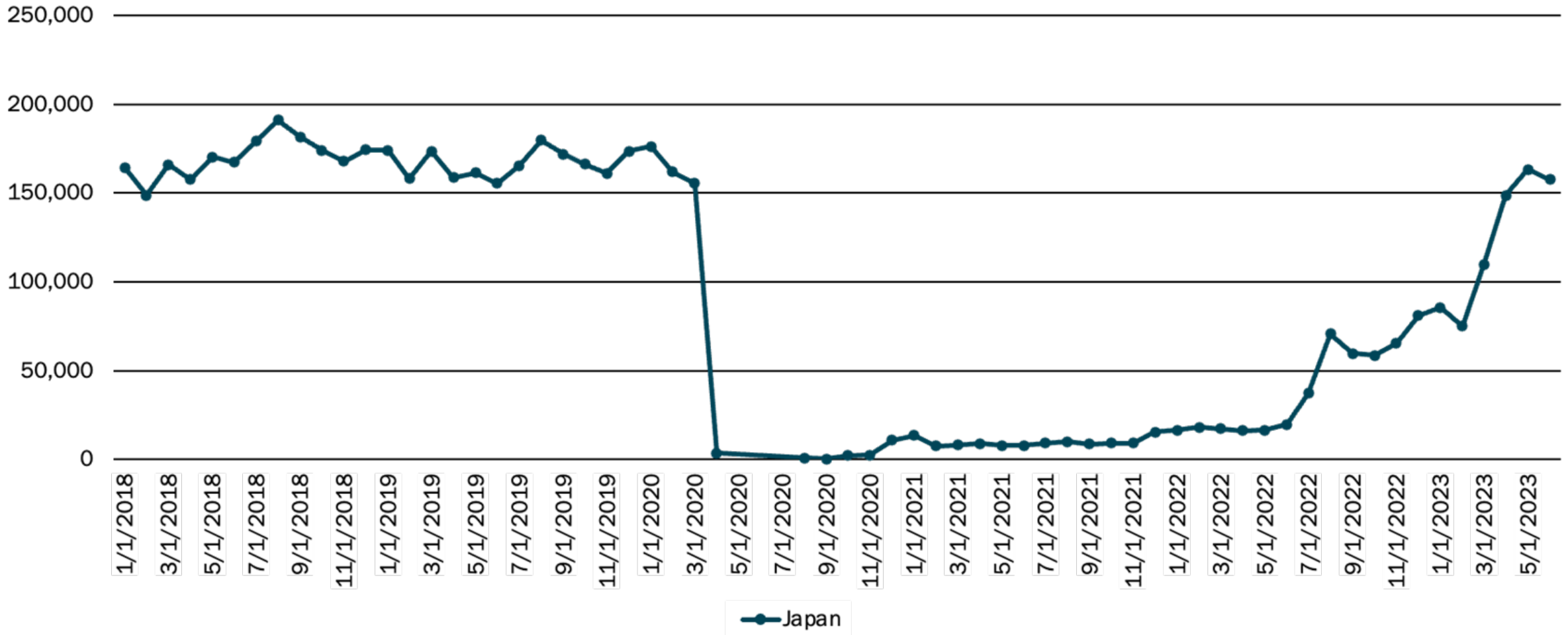
U.S. Seats 2018-2023



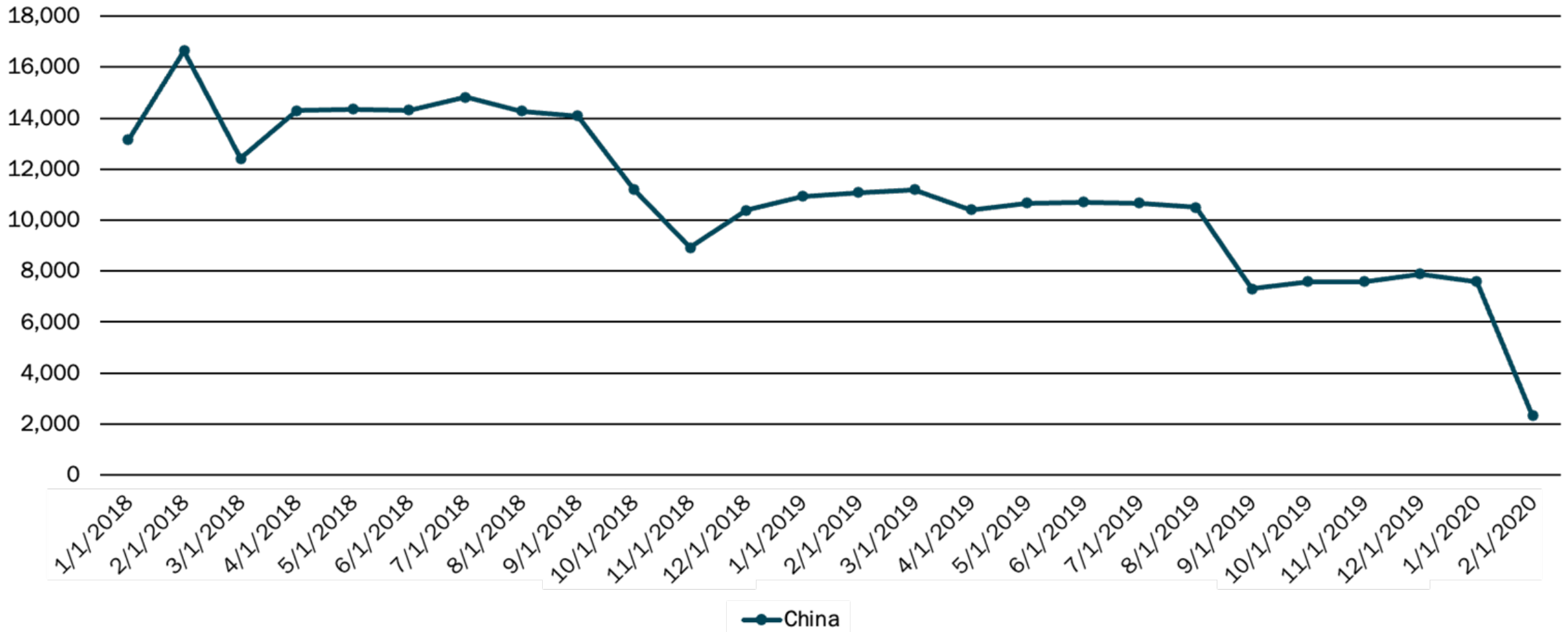
South Korea Seats 2018-2023



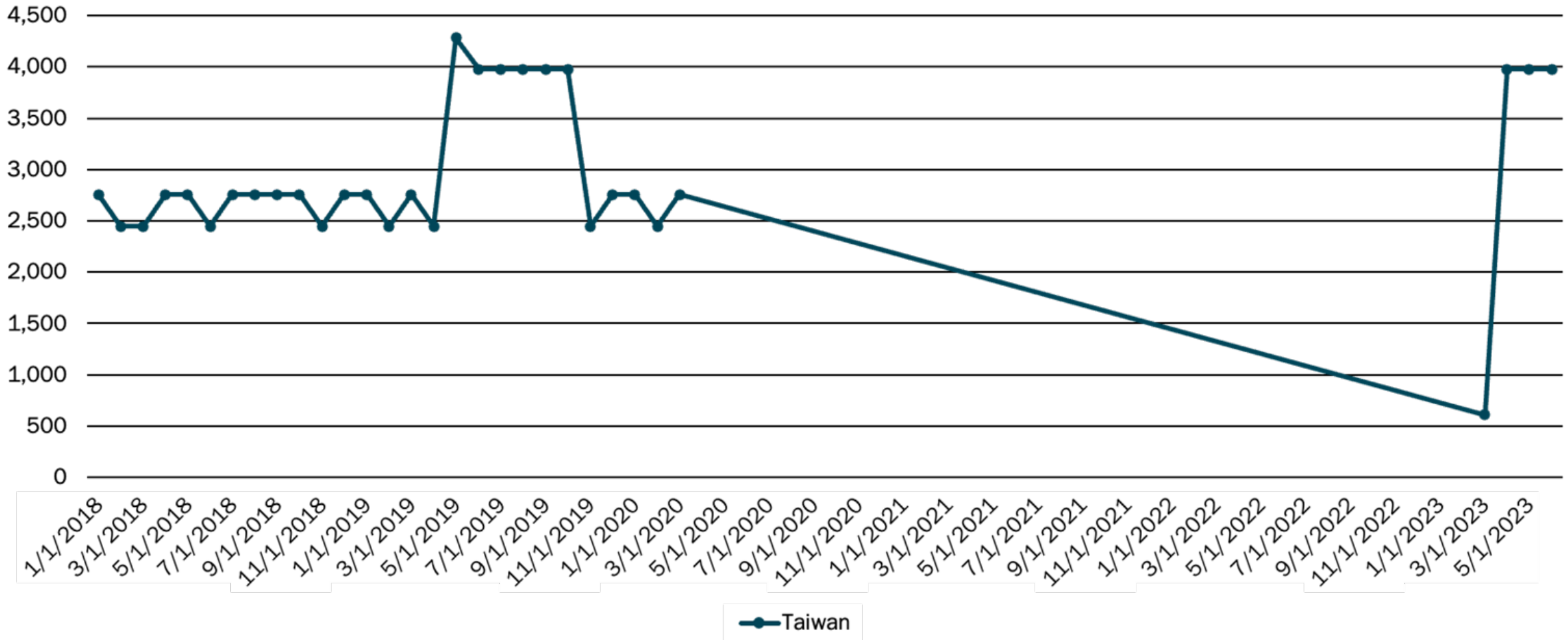
Japan Seats 2018-2023



China Seats 2018-2020



Taiwan Seats 2018-2023



Scheduled Non-Stop U.S. Seats to Hawai'i January – December 2019, 2021, 2022P

	# of SEATS 2019	# of SEATS 2021	# of SEATS 2022P*	% Change 22/19	% Change 22/21
O'ahu	4,962,887	5,192,872	5,581,195	12.5%	7.5%
Maui	2,668,370	3,194,004	3,158,069	18.4%	-1.1%
Kona	1,104,675	1,365,329	1,312,567	18.8%	-3.9%
Kaua'i	962,986	840,927	1,147,751	19.2%	36.5%
Hilo	47,872	38,935	47,433	-0.9%	21.8%
Total	9,746,790	10,632,067	11,247,015	15.4%	5.8%

* A seat scheduled is not a seat flown.

Scheduled Non-Stop Seats By Country to Hawai'i 2019, 2022

	# of SEATS 2019	# of SEATS 2022P*	% Change 22/19
Australia	369,282	206,511	-44.1%
Canada	484,613	490,467	1.2%
China	116,539	0	0%
Fiji	8,414	7,408	-12.0%
French Polynesia	18,718	14,734	-21.3%
Japan	1,999,204	Nov 29 Schedule 476,185 Sep 27 Schedule 557,371 Aug 31 Schedule 653,336	-76.2% -72.1% -67.3%
Kiribati	6,848	680	-90.1%

* A seat scheduled is not a seat flown.

Scheduled Non-Stop Seats By Country to Hawai'i 2019, 2022

	# of SEATS 2019	# of SEATS 2022P*	% Change 22/19
Marshall Islands	34,448	15,106	-56.1%
New Zealand	125,300	45,088	-64.0%
Philippines	73,248	55,620	-24.1%
South Korea	326,398	217,617	-33.3%
Taiwan	39,780	0	0%
United States	9,913,374	11,274,015	13.7%
Western Samoa	8,090	3,230	-60.1%

* A seat scheduled is not a seat flown.

SCHEDULED SEATS INTO HAWAII

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

	# 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	2,861,046	18.6%	1.9%
Maui	1,275,965	1,620,331	1,558,623	22.2%	-3.8%
Kona	581,808	678,715	660,380	13.5%	-2.7%
Kaua'i	481,642	581,931	529,671	10.0%	-9.0%
Hilo	21,654	19,993	1,162	-94.6%	-94.2%
Total	4,774,353	5,709,944	5,610,882	17.5%	-1.7%

* A seat scheduled is not a seat flown.

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

	# of SEATS Jan – Jun 2019	# of SEATS Jan – Jun 2023P*	% Change 23/19
Australia	181,063	120,757	-33.3%
Canada	306,686	276,452	-9.9%
China	65,007	0	0%
Fiji	4,282	4,420	3.2%
French Polynesia	8,062	6,950	-13.8%
Japan	981,290	Nov 29 Schedule 739,865 Nov 11 Schedule 783,259	-24.6% -20.2%
Kiribati	3,634	4,420	21.6%

* A seat scheduled is not a seat flown.

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

	# of SEATS Jan – Jun 2019	# of SEATS Jan – Jun 2023P*	% Change 23/19
Marshall Islands	17,018	14,442	-15.1%
New Zealand	60,028	45,434	-24.3%
Philippines	37,095	39,861	7.5%
South Korea	159,338	156,770	-1.6%
Taiwan	18,666	12,546	-32.8%
United States	4,856,169	5,684,136	17.0%
Western Samoa	4,482	4,420	-1.4%

* A seat scheduled is not a seat flown.

MAHALO

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