



## HTA Airline Seat Capacity Outlook for First Quarter 2015

The Hawai'i Tourism Authority (HTA), the state's tourism agency, forecasts the continuing growth of total scheduled nonstop air seats to Hawai'i in the first quarter of 2015. The projection is based on flights appearing in Diio Mi airline schedules as of December 2014.

After reaching a record high of nearly 11.2 million inbound air seats in calendar year 2014, scheduled nonstop capacity to Hawai'i is expected to continue to rise 6.1 percent over the same period last year from January through March 2015. Continued growth in the opening quarter of the year is expected to be driven by increases from both the domestic (+9.2%) and international (+0.5%) markets.

Outlook for Scheduled Nonstop Air Seats to Hawai'i

	2015 Q1	2014 Q1	%Chge	CY2014F	CY2013	%Chge
<b>TOTAL</b>	<b>2,923,439</b>	<b>2,755,562</b>	<b>6.1%</b>	<b>11,170,859</b>	<b>10,768,719</b>	<b>3.7%</b>
<b>Domestic</b>	<b>1,944,004</b>	<b>1,781,028</b>	<b>9.2%</b>	<b>7,536,431</b>	<b>7,206,155</b>	<b>4.6%</b>
US West	1,725,057	1,575,711	9.5%	6,681,913	6,373,358	4.8%
US East	218,947	205,317	6.6%	854,518	832,797	2.6%
<b>International</b>	<b>979,435</b>	<b>974,534</b>	<b>0.5%</b>	<b>3,634,428</b>	<b>3,562,564</b>	<b>2.0%</b>
Japan	480,550	516,820	-7.0%	2,015,905	2,029,288	-0.7%
Canada	186,869	163,860	14.0%	399,960	367,825	8.7%
Other Asia	113,892	131,012	-13.1%	517,432	463,490	11.6%
Oceania	120,383	98,760	21.9%	432,280	416,863	3.7%
Other	77,741	64,082	21.3%	268,851	285,098	-5.7%

Source: Diio Mi

### U.S. West

Scheduled seats from many of Hawai'i's key U.S. West gateways are expected to rise considerably, led by increases in seats from Seattle (+24.0%), Los Angeles (+6.8%), San Francisco (+15.8%), San Jose (+39.7%) and Denver (+49.8%). Overall, U.S. West scheduled seat capacity is expected to end the first quarter 9.5 percent above prior year levels.

## U.S. East

---

First quarter seat capacity from the U.S. East market is expected to increase 6.6 percent with growth concentrated around Chicago (+24.0%), Dallas (+13.2%) and New York (+7.6%).

## Japan

---

Scheduled nonstop seats from Japan are expected to decrease 7 percent in the first quarter, largely due to Hawaiian Airlines' suspension of nonstop service from Fukuoka, along with a 7.8 percent decrease in seats from Tokyo-Narita, primarily due to a shift to smaller aircraft on the route by Japan Airlines, China Airlines Korean Air and United Airlines. Declining seats from Fukuoka and Tokyo Narita are projected to offset an 8.5 percent rise in seats from Osaka.

## Canada

---

Nonstop air seats from Canada to Hawai'i are expected to rise 14 percent in the first quarter of 2015, boosted by new nonstop Toronto-Honolulu service. Launched in December 2014 by Air Canada rouge, a low cost subsidiary carrier of Air Canada, the carrier will also bring more seats into the state as it starts flying Air Canada's routes from Vancouver to Honolulu and Kahului. Additional flights by WestJet from Vancouver to Honolulu and Kahului are also expected to contribute to the increase in first quarter air seats to Hawai'i.

## Other Asia

---

Following six years of nearly uninterrupted growth, scheduled air seats from Other Asia are expected to decrease 13.1 percent during the January through March 2015 period. Although year-over-year capacity from Beijing is expected to rise, boosted by the continuation of nonstop Beijing-Honolulu flights launched by Hawaiian Airlines (April 2014) and Air China (January 2014), scheduled seats from Shanghai are expected to decrease nearly 19.7 percent during the first quarter, primarily due to a reduction in China Eastern flights in January. Scheduled seats from South Korea are expected to decrease 18.1 percent in the opening quarter of 2015, due to flight reductions by Korean Air and Hawaiian Airlines. Meanwhile, inbound seats from Taiwan are projected to be down 60.5 percent, following the suspension of Hawaiian Airlines' Taipei-Honolulu flights in April 2014.

## Oceania

---

With an increase of 21.9 percent in scheduled seats to Hawai'i, Oceania is expected to be the fastest growing region for the first quarter of 2015. The largest increase in Oceania capacity is expected to come from Brisbane (+156.3%), fueled by the launch of Jetstar Airways flights on the route and Hawaiian Airlines' switch from Boeing 767 to a larger Airbus A330 aircraft.

Meanwhile, an increase in Jetstar Airways flights will grow capacity from Melbourne by 18.8 percent and capacity increases from Jetstar Airways and Qantas are expected to generate a 6.1 percent rise in seats from Sydney. Air seats from Auckland (+2.3%) are also expected to rise slightly in the first quarter of 2015.

For more information about the Airline Seat Capacity Outlook or other research related reports, please contact:

Daniel Nāho‘opi‘i  
Director of Tourism Research  
Hawai‘i Tourism Authority  
1801 Kalākaua Avenue, 1<sup>st</sup> Floor  
Honolulu, Hawai‘i 96815  
(808) 973-2264  
[www.hawaii tourism authority.org/research](http://www.hawaii tourism authority.org/research)  
[daniel@gohta.net](mailto:daniel@gohta.net)