



## HTA Airline Seat Capacity Outlook for Third Quarter 2014

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

Growth in the third quarter period from July through September 2014 is expected to be driven by a 7.9 percent increase in domestic seats, along with year-over-year increases in international seats from Canada (+5.8%), Other Asia (+13.3%) and Oceania (+2.6%).

**Outlook for Scheduled Nonstop Air Seats to Hawai'i**

	2014 Q3	2013 Q3	%Chge
<b>TOTAL</b>	<b>2,886,005</b>	<b>2,765,575</b>	<b>4.4%</b>
<b>Domestic</b>	<b>2,020,715</b>	<b>1,873,251</b>	<b>7.9%</b>
US West	1,794,963	1,656,217	<b>8.4%</b>
US East	225,752	217,034	<b>4.0%</b>
<b>International</b>	<b>865,290</b>	<b>892,324</b>	<b>-3.0%</b>
Japan	500,911	547,568	<b>-8.5%</b>
Canada	44,431	41,995	<b>5.8%</b>
Other Asia	138,147	121,887	<b>13.3%</b>
Oceania	111,613	108,835	<b>2.6%</b>
Other	70,188	72,039	<b>-2.6%</b>

Source: Diio Mi

### U.S. West

Scheduled seats from many of Hawai'i's key U.S. West gateways are expected to rise considerably (Denver, +46.5%; Los Angeles, +14.0%; Oakland, +24.6%; San Jose, +14.9%; Seattle, +10.1%; Stockton, +11.5%), more than offsetting capacity reductions from smaller markets operated by Allegiant (i.e., Bellingham, Boise, Santa Maria and Spokane). Overall, U.S. West scheduled seat capacity is expected to end the third quarter 8.4 percent above prior year levels.

### U.S. East

Third quarter seat capacity from the U.S. East market is expected to increase 4.0 percent, pushed upwards by capacity gains from Dallas (+21.8%) and Houston (+33.2%).

## Japan

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Scheduled nonstop seats from Japan are expected to decrease -8.5 percent in the third quarter, pulled down by Hawaiian Airlines' suspension of nonstop service from Fukuoka, along with a -9.0 percent decrease in seats from Tokyo-Narita (i.e., resulting primarily from a reduction in flights by Delta Air Lines and a temporary shift to smaller aircraft by Japan Airlines, from Boeing 767's to Boeing 787's).

## Canada

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Nonstop air seats from Canada to Hawai'i are expected to rise 5.8 percent in the third quarter of 2014, driven by an increase in service from Vancouver by WestJet Airlines, which is expected to fuel year-over-year increases in total seats from Canada to each of the Hawaiian Islands: O'ahu (+4.6%), Maui (+6.9%), Kaua'i (+8.3%), Hawai'i Island (+8.3%).

## Other Asia

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Other Asia is expected to continue to be Hawai'i's fastest growing region for scheduled air seats during the July through September 2014 period, boosted by the launch of nonstop Beijing-Honolulu flights by Hawaiian Airlines (April) and Air China (January) earlier in the year, and the expansion of Shanghai-Honolulu service by China Eastern Airlines (+85.0%). Increases in nonstop service from China are expected to offset third quarter reductions in scheduled seats from Taiwan (-53.6%) and South Korea (-4.0%).

## Oceania

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Scheduled air seats from Oceania are projected to rise 2.6 percent increase in the third quarter. Year-over-year increases from Auckland (+4.2%), Brisbane (+17.8%) and Melbourne (+46.4%) are expected to offset a slight reduction in capacity from Sydney (-6.5%).

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

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