



## HTA Airline Seat Capacity Outlook for First Quarter 2016

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 2016. The projection is based on flights appearing in Diio Mi airline schedules as of December 2015.

Scheduled air service to Hawai'i is expected to grow +2.4 percent in the first three months of the year, with air seats totaling nearly three millions – a new first quarter record high. Growth in the opening quarter is expected to be driven by increases from the U.S. (+4.2%), Canada (+7.1%), Other Asia (+3.0%), and Oceania (+4.9%) markets.

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

	2016 Q1 Forecast	2015 Q1	% Change
<b>Total</b>	<b>2,989,527</b>	<b>2,919,243</b>	<b>2.4%</b>
<b>Domestic</b>	<b>2,025,122</b>	<b>1,944,214</b>	<b>4.2%</b>
<b>US West</b>	1,788,877	1,725,493	3.7%
<b>US East</b>	236,245	218,721	8.0%
<b>International</b>	<b>964,405</b>	<b>975,029</b>	<b>-1.1%</b>
<b>Japan</b>	449,771	479,877	-6.3%
<b>Canada</b>	200,073	186,869	7.1%
<b>Other Asia</b>	117,013	113,562	3.0%
<b>Oceania</b>	125,945	120,080	4.9%
<b>Other</b>	71,603	74,641	-4.1%

### U.S. West

Boosted in part by the entry of Virgin America into the Hawai'i market, airlines are expected to add more than 63,000 additional seats to the state from the U.S. West market, with the largest increases in inbound seat inventory coming from San Francisco (+15.7%) and Seattle (+10.0%). Overall, U.S. West scheduled seat capacity is expected to end the first quarter +3.7 percent above prior year levels.

## U.S. East

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First quarter seat capacity from the U.S. East market is expected to increase +8.0 percent, with the largest gain in air seats coming from Minneapolis (+21,271 seats) due to Delta Air Lines launch of seasonal service. Additional flights by Hawaiian Airlines are also expected to increase scheduled seat capacity from New York JFK by +17.6 percent.

## Japan

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Scheduled nonstop seats from Japan are expected to continue to be down year-over-year in the first quarter of 2016 (-6.3%). Despite an increase in seats from Narita (+2.7%) and Sapporo (+2.6%), declines in air seat capacity from Fukuoka (-25.8%), Osaka (-18.3%) and Nagoya (-16.6%) will offset any increased service.

## Canada

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Nonstop air seats from Canada to Hawai‘i are expected to grow +7.1 percent in the first quarter of 2016. The increase in Canadian capacity results primarily from the conversion of Air Canada to Air Canada rouge service in the Vancouver-Honolulu/Kahului markets, a change that brought upon an increase in flights and a switch to higher-capacity aircraft.

## Other Asia

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Following a slight dip in capacity in the fourth quarter of 2015, air service from Other Asia is once again expected to grow in the first quarter of 2016 (+3.0%). Growth is mainly driven by an increase in air seats from Shanghai (+12.1%) and Beijing (+11.9%).

## Oceania

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A projected +4.9 percent growth in air service from Oceania is being fueled by increased flights by Jetstar Airways and a switch to the larger Boeing 787 aircraft on the Melbourne-Honolulu route. As a result, air seats from Melbourne are expected to grow +55.4 percent in the first quarter of 2016.

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

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