



Hawai'i Airline Seat Capacity Outlook for Second Quarter 2016

The Hawai'i Tourism Authority (HTA), the state's tourism agency, forecasts the scheduled nonstop air seats to the Hawaiian Islands in the second quarter of 2016. The projection is based on flights appearing in Diio Mi airline schedules as of March 2016.

In general, scheduled air service to Hawai'i is expected to slightly decrease 0.2 percent in the second quarter from April through June 2016. Declines are projected for the U.S. East (-7.2%), Japan (-5.3%) and Canada (-4.3%) markets, while Other Asia is (+26.1%) and Oceania (+5.9%) are expected to make significant gains. For the first six months of 2016, an increase in seats is expected to bring a record 6 million scheduled seats into Hawai'i representing an increase of 1.1 percent above prior period levels.

Outlook for Scheduled Nonstop Air Seats to Hawai'i

	2016 Q2 Forecast	2015 Q2	% Chge	2016 YTD thru Q2 Forecast	2015 YTD thru Q2	% Chge
TOTAL	2,980,337	2,985,730	-0.2%	5,969,864	5,904,973	1.1%
US TOTAL	2,086,815	2,098,146	-0.5%	4,111,937	4,042,360	1.7%
US WEST	1,864,188	1,858,256	0.3%	3,653,065	3,583,749	1.9%
US EAST	222,627	239,890	-7.2%	458,872	458,611	0.1%
INTERNATIONAL	893,522	887,584	0.7%	1,857,927	1,862,613	-0.3%
JAPAN	452,676	477,975	-5.3%	902,447	957,852	-5.8%
CANADA	93,649	97,877	-4.3%	293,722	284,746	3.2%
OTHER ASIA	142,002	112,601	26.1%	259,015	226,163	14.5%
OCEANIA	132,219	124,832	5.9%	258,164	244,912	5.4%
OTHER	72,976	74,299	-1.8%	144,579	148,940	-2.9%

Source: Diio Mi

U.S. West

Overall, U.S. West scheduled seat capacity is expected to end the second quarter +0.3 percent above prior year levels due to the growth from the Denver (+14%), Anchorage (+7.9%), Oakland (+6.5%), San Francisco (+3.5%) and San Diego (+3.1%) markets. These projected gains are being offset by decreases from the Bellingham (-17.1%), Phoenix (-3.1%), Las Vegas (-2.2%) and Los Angeles (-2%) markets.

U.S. East

The U.S. East market is forecasting a 7.2 percent decrease due to a reduction in air seats from Washington, D.C. (-26.2%), Atlanta (-16%), Chicago (-13.3%) and Dallas (-8%). The overall decline is being partially offset by Hawaiian Airlines adding flights and scheduled seats from New York JFK (+14.1%).

Japan

Scheduled nonstop seats from Japan are expected to continue a downward trend (-5.3%) year-over-year in the second quarter of 2016. The major declines in air seat capacity are from Osaka (-17.1%), Nagoya (-6.5%) and Tokyo HND (-4.2%).

Canada

Nonstop air seats from Canada to Hawai'i are expected to decrease 4.3 percent with the loss of 5,500 seats from Vancouver this quarter compared to the same period last year. Seats from Toronto (-24.5%) and Victoria (-23.5%) will also decrease, while Edmonton (+26.6%) and Calgary (+15.5%) will produce significant growth in seat capacity.

Other Asia

Building on the growth of air seat capacity in the first quarter, air service from Other Asia is expected to maintain strong growth (+26.1%) in the second quarter of 2016. This is attributed to the increase in air seats from Shanghai (+63.5%) and Seoul (29.5%) due to Jin Air's launch of its Seoul-Honolulu flights five times per week.

Oceania

Increased service by Jetstar Airways and a switch to the larger Boeing 787 aircraft on the Melbourne-Honolulu route will contribute to a projected +5.9 percent growth in air service from Oceania in the second quarter. In addition, air seats are expected to grow from Melbourne (+21.9%), Brisbane (+5.3%), Sydney (+4.5%) and Auckland (+2.5%).

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

Daniel Nāho'opi'i (daniel[@gohta.net](mailto:daniel@gohta.net))

Director of Tourism Research

Hawai'i Tourism Authority

1801 Kalākaua Avenue, 1st Floor

Honolulu, Hawai'i 96815

(808) 973-2264

www.hawaiitourismauthority.org/research