



HTA Airline Seat Capacity Outlook for Third 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 third quarter of 2016. The projection is based on flights appearing in Diio Mi airline schedules as of June 2016.

Scheduled air service to Hawai'i is expected to grow +1.1 percent from July-September 2016 with air seats totaling more than 3 million – a new third quarter record high. Growth in the quarter is expected to be driven by increases from the U.S. West (+2.3%), Other Asia (+11.3%), and Oceania (+6.5%) markets. For the first nine months of 2016, an increase in seats is expected to bring a record more than 9 million scheduled seats into Hawai'i, up 1.1 percent from prior period levels.

Outlook for Scheduled Nonstop Air Seats to Hawai'i

	2016 Q3 Forecast	2015 Q3	% Chge	2016 YTD thru Q3 Forecast	2015 YTD thru Q3	% Chge
TOTAL	3,060,482	3,027,537	1.1%	9,030,346	8,932,510	1.1%
US TOTAL	2,148,656	2,117,316	1.5%	6,260,593	6,159,676	1.6%
US WEST	1,919,049	1,875,501	2.3%	5,572,114	5,459,250	2.1%
US EAST	229,607	241,815	-5.0%	688,479	700,426	-1.7%
INTERNATIONAL	911,826	910,221	0.2%	2,769,753	2,772,834	-0.1%
JAPAN	500,084	518,861	-3.6%	1,402,531	1,476,713	-5.0%
CANADA	55,116	57,430	-4.0%	348,838	342,176	1.9%
OTHER ASIA	146,551	131,670	11.3%	405,566	357,833	13.3%
OCEANIA	135,643	127,315	6.5%	393,807	372,227	5.8%
OTHER	74,432	74,945	-0.7%	219,011	223,885	-2.2%

Source: Doii Mi

U.S. West

Overall, U.S. West scheduled seat capacity is expected to end this quarter +2.3 percent above prior year levels. Growth in seats coming from Anchorage (+26.2%), Denver (+26.3%), Oakland (+10.3%), San Francisco (+8.2%) and Seattle (+6%) will offset declines from Las Vegas (-1.7%), Los Angeles (-1.6%), Phoenix (-1.9%) and San Jose (-3.5%).

U.S. East

The third quarter seat capacity from the U.S. East market is expected to decline 5 percent, with fewer seats coming from Chicago (-20.9%), Atlanta (-16.3%) and Dallas (-3.6%) offsetting growth in air seats out of Washington D.C. (+24.1%).

Japan

Scheduled nonstop seats from Japan are expected to continue to be down year-over-year in the third quarter of 2016 (-3.6%) because of declines from Osaka (-14.5%), Fukuoka (-8.5%) and Nagoya (-7.2%).

Canada

Nonstop air seats from Canada to Hawai'i are expected to decrease 4 percent in third quarter 2016 with the loss of 2,300 seats from Vancouver compared to the same period last year.

Other Asia

Strong growth in air service from Other Asia is expected to continue in the third quarter of 2016 (+11.3%). Increased air seats from Seoul (+20.3%) and Shanghai (+15.2%) will offset declines from Beijing (-15%) and Taipei (-3.7%).

Oceania

A +6.5 percent growth in air service from Oceania is expected for third quarter 2016 with seat capacity increases from Melbourne (+24.1%), Brisbane (+4.8%) and Auckland (+16.5%) compared to third quarter 2015.

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

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