



HTA Airline Seat Capacity Outlook for Fourth 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 fourth quarter of 2014. The projection is based on flights appearing in Diio airline schedules as of September 2014.

Growth in the fourth quarter period from October through December 2014 is expected to be driven by an 8.9 percent increase in domestic seats, along with year-over-year increases in international seats from Canada (+15.6%), Other Asia (+11.2%) and Oceania (+8.6%). In addition, the strong momentum heading into the fourth quarter is projected to send total 2014 year-end scheduled capacity to Hawai'i to a record 11.1 million inbound seats.

Outlook for Scheduled Nonstop Air Seats to Hawai'i

	2014 Q4	2013 Q4	%Chge	CY2014F	CY2013	%Chge
TOTAL	2,813,804	2,653,936	6.0%	11,192,032	10,768,719	3.9%
Domestic	1,886,347	1,731,604	8.9%	7,535,977	7,206,155	4.6%
US West	1,669,127	1,532,758	8.9%	6,681,459	6,373,358	4.8%
US East	217,220	198,846	9.2%	854,518	832,797	2.6%
International	927,457	922,332	0.6%	3,656,055	3,562,564	2.6%
Japan	487,578	528,348	-7.7%	2,015,710	2,029,288	-0.7%
Canada	113,105	97,840	15.6%	403,678	367,825	9.7%
Other Asia	137,128	123,338	11.2%	534,258	463,490	15.3%
Oceania	116,602	107,367	8.6%	432,280	416,863	3.7%
Other	73,044	65,439	11.6%	270,129	285,098	-5.3%

Source: Diio Mi

U.S. West

Scheduled seats from many of Hawai'i's key U.S. West gateways are expected to rise considerably, more than offsetting capacity reductions from smaller markets, including Bellingham, Boise and Spokane. Increases in seats from Los Angeles (+13.2%), Oakland (+11.5%), San Jose (+21.1%) and Seattle (+16.0%) will contribute to this growth. Overall, U.S. West scheduled seat capacity is expected to end the fourth quarter 8.9 percent above prior year levels.

U.S. East

Fourth quarter seat capacity from the U.S. East market is expected to increase 9.2 percent, with growth in air seats from the U.S. East market concentrated around Chicago (+13.7%), Dallas (+12.3%), Houston (+10.5%) and New York (+15.5%).

Japan

Scheduled nonstop seats from Japan are expected to decrease 7.7 percent in the fourth quarter, due to Hawaiian Airlines' suspension of nonstop service from Fukuoka, a 5.4 percent decrease in seats from Tokyo-Narita (resulting primarily from a shift to smaller aircrafts on routes by Japan Airlines, China Airlines and United Airlines) and a 7.8 percent decrease in seats from Nagoya.

Canada

Nonstop air seats from Canada to Hawai'i are expected to rise 15.6 percent in the fourth quarter of 2014, highlighted by the launch of nonstop Toronto-Honolulu service by Air Canada rouge – a low cost subsidiary carrier of Air Canada, which 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 Kona and Līhu'e are also expected to contribute to the increase in fourth quarter air seats to Hawai'i.

Other Asia

Scheduled air seats from Other Asia are expected to continue to rise during the October through December 2014 period, boosted by the continuation of nonstop Beijing-Honolulu flights launched by Hawaiian Airlines (April) and Air China (January) earlier in the year and the expansion of Shanghai-Honolulu service by China Eastern Airlines. Scheduled seats from South Korea are expected to be relatively even in comparison to prior year levels (-0.2%) in the fourth quarter, while seats from Taiwan are projected to be down 57.4 percent, following the suspension of Hawaiian Airlines' Taipei-Honolulu flights in April.

Oceania

Scheduled air seats from Oceania are projected to rise 8.6 percent in the fourth quarter, with the largest increase in capacity expected from Brisbane (+44.7%), fueled by the launch of Jetstar Airways flights on the route and Hawaiian Airlines switch from Boeing 767 to larger Airbus A330 aircraft. Year-over-year increases are also expected from Auckland (+3.6%), Melbourne (+22.6%) and Sydney (+2.1%).

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

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