



## HTA Airline Seat Capacity Outlook for Fourth Quarter 2015

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 fourth quarter of 2015. The projection is based on flights appearing in Diio Mi airline schedules as of September 2015.

Growth in scheduled air service to Hawai'i is expected to continue into the fourth quarter (+3.8%), an increase in seats that would bring total scheduled year-end capacity for 2015 to a record 11.8 million seats - an increase of 5.9 percent above prior year levels. Growth in the fourth quarter, from October through December 2015, is expected to be driven by increases from the U.S. (+5.1%), Canada (+9.7%) and Oceania (+12.4%) markets.

Outlook for Scheduled Nonstop Air Seats to Hawai'i

	2015 Q4 Forecast	2014 Q4	%Chge	2015 YTD thru Q4 Forecast	2014 YTD thru Q4	%Chge
<b>TOTAL</b>	<b>2,898,561</b>	<b>2,792,540</b>	<b>3.8%</b>	<b>11,831,320</b>	<b>11,170,732</b>	<b>5.9%</b>
<b>Domestic</b>	<b>1,983,171</b>	<b>1,886,710</b>	<b>5.1%</b>	<b>8,143,096</b>	<b>7,536,304</b>	<b>8.1%</b>
US West	1,753,709	1,669,490	5.0%	7,212,983	6,681,786	7.9%
US East	229,462	217,220	5.6%	930,113	854,518	8.8%
<b>International</b>	<b>915,390</b>	<b>905,830</b>	<b>1.1%</b>	<b>3,688,224</b>	<b>3,634,428</b>	<b>1.5%</b>
Japan	473,343	487,773	-3.0%	1,950,056	2,015,905	-3.3%
Canada	119,957	109,387	9.7%	462,133	399,960	15.5%
Other Asia	118,609	120,302	-1.4%	476,442	517,432	-7.9%
Oceania	131,011	116,602	12.4%	503,238	432,280	16.4%
Other	72,470	71,766	1.0%	296,355	268,851	10.2%

Source: Diio Mi

### U.S. West

Boosted in part by the entry of Virgin America into the Hawai'i market, airlines are expected to add more than 84,000 scheduled seats to the state from the U.S. West market, with the largest increases in inbound seat inventory coming from San Francisco (+24.9%) and Seattle (+15.0%). Overall, U.S. West scheduled seat capacity is expected to end the fourth quarter 5.0 percent above prior year levels.

## U.S. East

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Fourth quarter seat capacity from the U.S. East market is expected to increase 5.6 percent, with the largest gain in air seats coming from Minneapolis (+10,622 seats, Delta Air Lines launch of seasonal Minneapolis service). Additional flights by Hawaiian Airlines are also expected to increase scheduled capacity from New York JFK, by 5.9 percent.

## Japan

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Following a year-over-year increase in seats in the third quarter, scheduled nonstop seats from Japan are expected to decline below prior year levels in the fourth quarter (-3.0%), despite an increase in seats from Narita (+5.8%). The largest decreases in fourth quarter capacity are expected from the Osaka (-17.5%), Nagoya (-13.0%) and Fukuoka (-9.4%) markets.

## Canada

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Nonstop air seats from Canada to Hawai'i are expected to rise 9.7 percent in the fourth quarter of 2015, the start of the peak winter travel season for Canadian vacationers. The fourth quarter 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 six years of nearly uninterrupted growth, scheduled air seats from Other Asia are expected to decrease 1.4 percent during the October through December 2015 period. Although year-over-year capacity from Seoul is expected to decline 1.7 percent in the fourth quarter, this reduction in seats could be completely offset by the planned launch of five-times weekly Seoul-Honolulu flights by Jin Air in late December. Jin Air's flights do not yet appear in the Diiomi airline flight schedules.

## Oceania

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With a projected air seat increase of 12.4 percent, Oceania is expected to be Hawai'i's fastest growing region for inbound fourth quarter capacity. The largest increase in Oceania capacity is expected to come from Brisbane (+63.2%), fueled by the launch of Jetstar Airways flights on the route and Hawaiian Airlines' switch from Boeing 767 to larger Airbus A330 aircraft. Meanwhile, Melbourne capacity will be boosted (+25.1%) by Jetstar Airways' increase in flights and switch to larger Boeing 787 aircraft on the route; and an increase in Qantas capacity is expected to generate a 1.7 percent rise in seats from Sydney.

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

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