



## HTA Airline Seat Capacity Outlook for First Quarter 2018

The Hawai'i Tourism Authority (HTA), the state's tourism agency, forecasts that total scheduled nonstop air seat capacity to Hawai'i will increase significantly in first quarter 2018 compared to the same timeframe from a year ago. The projected growth is based on flights appearing in Diio Mi airline schedules as of December 2017.

Scheduled air seat capacity to Hawai'i is expected to increase by 10.9 percent in the first three months of the year, totaling nearly 3.3 million air seats. Growth in air seat capacity in the first quarter is being driven by increases from several global markets, including the U.S. mainland (+14.1%), Other Asia (+24.3%), Oceania (+5.2%) and Canada (+2.9%).

### Scheduled Nonstop Air Seats to Hawai'i

	2018 Q1 Forecast	2017 Q1	% Change
<b>Total</b>	<b>3,291,182</b>	<b>2,966,915</b>	<b>10.9</b>
<b>Domestic</b>	<b>2,258,257</b>	<b>1,978,616</b>	<b>14.1</b>
<b>US West</b>	1,962,221	1,717,254	<b>14.3</b>
<b>US East</b>	296,036	261,362	<b>13.3</b>
<b>International</b>	<b>1,032,925</b>	<b>988,299</b>	<b>4.5</b>
<b>Japan</b>	479,078	485,482	<b>-1.3</b>
<b>Canada</b>	189,898	184,534	<b>2.9</b>
<b>Other Asia</b>	167,499	134,783	<b>24.3</b>
<b>Oceania</b>	119,711	113,807	<b>5.2</b>
<b>Other</b>	76,739	69,693	<b>10.1</b>

### U.S. West

Airlines are expected to add nearly 245,000 seats to Hawai'i from U.S. West cities in the first quarter, with double-digit increases in inbound seat inventory from Salt Lake City (+49.5%), Denver (+40.5%), San Francisco (+23.7%), Portland (+18.7%) and Los Angeles (+18.0%), along with growth from Seattle (+6.6%) and Phoenix (+5.2%).

Overall, U.S. West scheduled air seat capacity is expected to increase by 14.3 percent in the first quarter above prior year levels.

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### U.S. East

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Air seat capacity from U.S. East cities are expected to increase by 13.3 percent in the first three months of 2018, with gains in air seats from Chicago (+57.2%), Washington D. C. (+38%), Dallas (+25.6%), Newark (+13.9%) and Houston (+5.8%). Scheduled air seat capacity is expected to decrease from New York's John F. Kennedy International Airport by 32.2 percent.

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### Japan

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Scheduled air seat capacity from Japan is expected to decline slightly by 1.3 percent in first quarter 2018. Increases in air seats from Osaka (+33.7%) and Sapporo (+2.1%) are being offset by declines in air seats from Tokyo HND (-26%), Nagoya (-3.8%), Tokyo NRT (-2.4%) and Fukuoka (-1.5%).

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### Canada

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Nonstop air seat capacity from Canada to Hawai'i is expected to grow by 2.9 percent in the first three months of 2018. Increases in air seats from both Vancouver (+3.9%), fueled by growth on the Vancouver-Kona route (+21.3%), as well as Calgary (+0.9%), which expects an increase on the Calgary-Honolulu route (+4%), are offsetting declines in air seats from Toronto (-7.7%) and Edmonton (-3.8%).

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### Other Asia

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Air seat capacity from Other Asia markets is expected to grow in first quarter 2018 (+24.3%). Growth is mainly being driven by an increase in air seats from Korea (+35.7%), Shanghai (+24%) and Taipei (+2.4%), which is offsetting a decline of 10.6 percent in air seats from Beijing.

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### Oceania

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Air service from Oceania is projected to grow by 5.2 percent in the first three months. An expected increase of 25.6 percent in air seats for the Auckland-Honolulu route is offsetting the decline of 2.3 percent on the Melbourne-Honolulu route.

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

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