



Airline Seat Capacity Outlook for Fourth Quarter 2017

The Hawai'i Tourism Authority (HTA), the state's tourism agency, forecasts that total scheduled nonstop air seats to Hawai'i in fourth quarter 2017 (October-December) will be comparable to the same period last year. The projection is based on flights appearing in Diio Mi airline schedules as of September 2017.

Growth in scheduled air seats for fourth quarter 2017 is expected to increase by 4.7 percent year-over-year. Growth is expected from Other Asia (+15.7%), Canada (+10.5%), U.S. West (+4.6%), Japan (+3.8%), and Oceania (+1.2%) offsetting a slight decline from U.S. East (-0.2%). For the entire year, an expected increase (+1.9%) will result in more than 12.1 million scheduled air seats serving the Hawaiian Islands in 2017, a new record for the State.

Scheduled Nonstop Air Seats to Hawai'i

	2017 Q4 Forecast	2016 Q4	% Chge	2017 Annual Forecast	2016 Annual	% Chge
TOTAL	3,044,381	2,907,169	4.7%	12,147,992	11,927,024	1.9%
US TOTAL	2,071,165	1,990,623	4.0%	8,341,316	8,247,887	1.1%
US WEST	1,835,360	1,754,312	4.6%	7,332,706	7,324,285	0.1%
US EAST	235,805	236,311	-0.2%	1,008,610	923,602	9.2%
INTERNATIONAL	973,216	916,546	6.2%	3,806,676	3,679,137	3.5%
JAPAN	479,914	462,505	3.8%	1,986,359	1,835,718	8.2%
CANADA	127,510	115,430	10.5%	462,889	462,845	0.0%
OTHER ASIA	169,221	146,226	15.7%	580,544	575,244	0.9%
OCEANIA	122,157	120,710	1.2%	483,041	514,641	-6.1%
OTHER	74,414	71,675	3.8%	293,843	290,689	1.1%

Source: Diio Mi

U.S. West

Scheduled air seats from U.S. West in fourth quarter 2017 are expected to increase 4.6 percent year-over-year. Growth in seats from Salt Lake City (+9.7%), San Francisco (+9.6%), Los Angeles (+9.0%), Bellingham (+3.5%), Seattle (+3.1%) and Oakland (+3.1%) will offset declines from

Phoenix (-7.2%), San Diego (-3.6%), and Portland (-2.1%). For the full year, total scheduled air seats are expected to remain flat in 2017 compared to 2016.

U.S. East

Seat capacity from U.S. East is expected to remain flat in fourth quarter 2017. Increases in seats from Houston (+5.8%), Chicago (+3.1%), Newark (+2.5%) and Dallas (+1.9%) will offset declines from Washington, D.C. (-23%), Minneapolis (-12%), and New York's John F. Kennedy International Airport (-7.2%). For the full year, seat capacity is expected to increase by 9.2 percent in 2017 compared to 2016.

Japan

Scheduled nonstop air seats from Japan are expected to increase by 3.8 percent in fourth quarter 2017 compared to the same period in 2016. Increases from Osaka (+24.7%), Sapporo (+2.6%) and Tokyo's Narita International Airport (+1.6%) will be mostly offset by declines from Tokyo's Haneda Airport (-5.6%) and Fukuoka (-4.4%). Total seat capacity for all of 2017 will increase by 8.2 percent compared to 2016.

Canada

Nonstop air seats from Canada to Hawai'i are expected to grow 10.5 percent in fourth quarter 2017 year-over-year, with increases from all departure cities including Toronto (+50%), Edmonton (+16.7%), Vancouver (+10.8%) and Calgary (+4%). However, the total number of air seats for the full year in 2017 is expected to remain flat compared to last year.

Other Asia

This market is expected to realize strong growth in air seats (+15.7%) in fourth quarter 2017 due to the increase in service from Seoul (+26%). Other departure cities will have declines in air seats, including Taipei (-10.2%), Beijing (-2.8%) and Shanghai (-1.4%). For all of 2017, scheduled air seats are expected to grow 0.9 percent compared to 2016.

Oceania

Air seat capacity from Oceania is expected to increase 1.2 percent in fourth quarter 2017 compared to the year prior. There will be increases in air seats from Auckland (+8%), Melbourne (+7%) and Sydney (+4.9%), which will counteract a decline in seats from Brisbane (-30.5%). Therefore, total air seats for the full year of 2017 are expected to decrease 6.1 percent versus last year.

For more information about the Airline Seat Capacity Outlook, please visit:
[www.hawaii tourism authority.org/research/Infrastructure Research](http://www.hawaii tourism authority.org/research/Infrastructure%20Research)