



HTA Airline Seat Capacity Outlook for First Quarter 2020

The Hawaii Tourism Authority (HTA), the state's tourism agency, forecasts the growth of total scheduled nonstop air seats to Hawaii in the first quarter of 2020. The projection is based on flights appearing in Diio Mi airline schedules as of December 2019.

Scheduled air service to Hawaii is expected to grow 6.8 percent in the first three months of 2020, with air seats totaling more than three and a half million. Growth in the opening quarter will be driven by increases from the U.S. (+11.1%) and Japan (+1.5%) markets.

Scheduled Nonstop Air Seats to Hawaii

| | 2020 Q1 Forecast | 2019 Q1 | % Change |
|---------------|------------------|-----------|----------|
| Total | 3,544,487 | 3,318,733 | 6.8 |
| Domestic | 2,532,647 | 2,279,579 | 11.1 |
| US West | 2,180,223 | 1,980,931 | 10.1 |
| US East | 352,424 | 298,648 | 18.0 |
| International | 1,011,840 | 1,039,154 | -2.6 |
| Japan | 513,251 | 505,898 | 1.5 |
| Canada | 194,980 | 211,342 | -7.7 |
| Other Asia | 120,796 | 129,397 | -6.6 |
| Oceania | 103,434 | 115,945 | -10.8 |
| Other | 79,379 | 76,572 | 3.7 |

U.S. West

Airlines are expected to add more than 199,292 seats from the U.S. West market, with double digit increases in inbound seat inventory coming from Oakland (+77.8%), San Jose (+68.6%), Sacramento (+62.8%), Las Vegas (+15.3%) and Denver (+14.5%). Seats from Salt Lake City (+7.5%), San Francisco (+7.5%), and Seattle (+7.1%) will also increase, offsetting declines in air seat capacity from San Diego (-5.2%), Portland (-4.7%) and Phoenix (-2.5%) in first quarter 2020. Overall, U.S. West scheduled seat capacity is expected to end the first quarter 10.1 percent above prior year levels.

U.S. East

First quarter seat capacity from the U.S. East market is expected to increase 18 percent, with the largest gain in air seats coming from Dallas (+25.2%), followed by Chicago (+17.2%) and New York JFK (+3%). Scheduled air seat capacity is expected to decrease from Minneapolis by 9.1 and Atlanta by 2.5 percent.

Japan

Scheduled nonstop seats from Japan are expected to be up in the first quarter of 2020 (+1.5%). The increase of the seat capacity are mainly from Tokyo NRT (+16.3%) and Tokyo HND (+5.1%). However, seats will decline from Osaka (-24.7%), Sapporo (-11.4%) and Fukuoka (-3.1%).

Canada

Nonstop air seats from Canada to Hawai'i are expected to be down by 7.7 percent from January to March 2020. The decrease in Canadian seat capacity is driven by Edmonton (-69.3%), Calgary (-12.3%) and Vancouver (-8.7%). Decreased seat capacity will offset the increased services from Toronto (+246.5%).

Other Asia

Air service from Other Asia is expected to decrease in the first quarter of 2020 (-6.6%) due to the discontinued flights from Beijing and Hangzhou. Air seat capacity will be expected to increase from Taipei (+3.8%), Seoul (+1.7) and Shanghai (+1.3%).

Oceania

A projected 10.8 percent decrease in air service from Oceania is being fueled by decreased seats from Sydney-Honolulu route (-16.3%) as well as Auckland (-9.6%) and Brisbane (-2.5%), the decline of seats will be offsetting increase on the Melbourne-Honolulu route (+8.8%).

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

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