



## HTA Airline Seat Capacity Outlook Report for 2013

The Hawai'i Tourism Authority (HTA), the state's tourism agency, forecasts significant growth in total scheduled nonstop air seats to Hawai'i in 2013. The projection is based on flights appearing in OAG and Diio airline schedules as of January 2013:

- Total scheduled seat capacity is expected to climb 6.8 percent in 2013 over last year, buoyed by gains in nearly all of Hawai'i's major markets, including double-digit increases in air seats from the U.S. East, Japan, Other Asia and Oceania markets.
- The total scheduled seat count is projected to surpass 10.7 million seats, a record high for the state of Hawai'i. Domestic seats are expected to reach their highest level since 2007, and international seats are expected to reach their highest point since 2000.

**2013 Hawai'i Scheduled Air Seats Outlook**

Category	2013 Estimate	2012	% Change
Total	10,751,473	10,071,160	6.8
Domestic	7,122,155	6,890,742	3.4
International	3,629,318	3,180,418	14.1
U.S. West	6,283,265	6,133,652	2.4
U.S. East	838,890	757,090	10.8
Japan	2,113,607	1,845,420	14.5
Canada	356,977	364,366	-2.0
Other Asia	481,968	408,150	18.1
Oceania	397,021	280,656	41.5
Other	279,745	281,826	-0.7

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### Japan

With more than 268,000 added air seats, the Japan market is expected to see an addition of more seats into Hawai'i than that from any other major market area in 2013. Total scheduled seats from Japan are expected to rise 14.5 percent, pushing the total seat count for the market over the two million mark for the first time since 2001. In addition to increased service by carriers presently flying from the core Tokyo and Osaka markets, growth in seats is expected to be boosted by Korean Air's launch of flights from Tokyo-Narita in March, as well as, the continuation of Hawaiian Airlines' flights launched last year from Fukuoka (April 2012) and Sapporo (October 2012). From a competitive perspective, these air service additions put Hawai'i

in position to outpace growth in Japan air seats over all competing long-haul and Asia region destinations in 2013.

**2013 Japan Outbound Scheduled Air Seats Outlook**

Japan to other destinations	2013 Estimate	2012	% Change
Hawai'i	2,113,607	1,845,420	14.5
U.S. Mainland	4,458,464	4,127,787	8.0
Guam	1,146,060	1,165,545	-1.7
Western Europe	3,562,144	3,422,490	4.1
Australia	626,882	630,359	-0.6
South Korea	8,044,729	7,610,292	5.7
Thailand	2,191,175	1,950,594	12.3
China	6,003,506	6,473,933	-7.3
Hong Kong	2,541,965	2,527,083	0.6

Source: Diio airline schedules

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## Oceania

Oceania, including both Australia and New Zealand, is the state's fastest growing region with air seats expected to grow 41.5 percent in 2013, elevating the market to a 12-year high of just over 397,000 seats. In addition to increased service from Sydney, the growth in capacity from Australia (+31.0%) will be fueled by the continuation of new routes launched late last year from Brisbane (November 2012) and Melbourne (December 2012) by Hawaiian Airlines and Jetstar Airways, respectively. In addition, Hawaiian Airlines' launch of new Auckland-Honolulu flights in March 2013 and increased service by Air New Zealand is expected to more than double the number of Hawai'i-bound seats from New Zealand (+121%) in 2013.

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## Other Asia

Other Asia is projected to be Hawai'i's second fastest growing region for scheduled capacity, with air seats expected to grow 18.1 percent in 2013, expanding the market to a 12-year high of nearly 482,000 seats. In addition to year-over-year gains from South Korea (+15.5%) and China (+47.9%), the launch of new flights from Taiwan is expected to contribute to growth from the Other Asia region. Airline schedules for 2013 currently include four China Airlines' Taipei-Honolulu flights specially scheduled for the Chinese New Year travel period. However, current airline schedules do not yet include Hawaiian Airlines' planned Taipei-Honolulu route which is expected to launch in July 2013. Hawaiian's flights from Taiwan are expected to add an estimated 22,900 additional seats from Other Asia in 2013. These seats are not included in this forecast.

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## U.S. West/U.S. East

The U.S. Mainland continues to be Hawai‘i’s single largest air service market, accounting for about two-thirds (66%) of scheduled seats to the state. Scheduled seats from U.S. West are expected to rise 2.4 percent in 2013, and seats from the eastern side of the country are expected to increase 10.8 percent. Growth from the U.S. West market will be fueled in part by Allegiant Air’s continued expansion into Hawai‘i with flights from Bellingham, Boise, Eugene, Fresno, Las Vegas, Phoenix Mesa, Santa Maria, Spokane and Stockton. Alaska Airlines’ launch of San Diego-Lihue service in June will also contribute to growth from the western region.

Meanwhile, Hawaiian Airlines’ route from New York and United Airlines’ route from Washington, D.C. both launched in June 2012, will continue to contribute to year-over-year increases in 2013. These air service additions put Hawai‘i in position to outpace growth in nonstop seats over competing destinations like Mexico and the Caribbean. Among competitive destinations, only Western Europe and Alaska are expected to grow faster in terms of air seats from the U.S. Mainland in 2013 over Hawai‘i.

**2013 U.S. Mainland Outbound Scheduled Air Seats Outlook**

U.S. Cities to Other Destinations	2013 Estimate	2012	% Change
Hawai‘i	7,122,155	6,890,742	3.4
Mexico	12,254,771	11,991,610	2.2
Caribbean	16,498,786	16,135,350	2.3
Western Europe	33,132,901	31,927,739	3.8
California	62,351,866	62,418,978	-0.1
Florida	62,072,855	60,310,439	2.9
Las Vegas	22,214,298	21,996,064	1.0
Alaska	2,233,704	2,109,559	5.9

Source: Diio airline schedules

Note: California, Florida, Las Vegas and Alaska figures exclude the Diio airline schedules intra-state flights.

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## Canada

At this point in the year, Canada is the only major market expected to experience a slight decrease in nonstop seats to Hawai‘i in 2013. Based on current airline schedules, nonstop scheduled seats from Canada are expected to decrease two percent below the near-record capacity levels seen in 2012. The dip below prior year levels results from an expected year-over-year reduction in Air Canada service from Calgary to Honolulu and Kahului.

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## Charter Flights

It is too early to project expected charter flight activity to Hawai'i in 2013. However, assuming charter seats remain even with prior year levels, the total scheduled and charter air seat count into Hawai'i is expected to reach a total of 10,970,296 seats in 2013, an increase of 6.7 percent over the prior year.

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

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**Total Seats to Hawaii by Port of Entry and MMA: 2013 (estimated) vs 2012**

	STATE		HONOLULU		KAHULUI		KONA		HILO		LIHU'E	
	2013E	%Chge	2013E	%Chge	2013E	%Chge	2013E	%Chge	2013E	%Chge	2013E	%Chge
<b>Total Seats</b>	<b>10,870,296</b>	<b>6.7%</b>	<b>7,717,667</b>	<b>8.4%</b>	<b>1,854,402</b>	<b>3.5%</b>	<b>613,055</b>	<b>-3.3%</b>	<b>52,288</b>	<b>-11.6%</b>	<b>632,884</b>	<b>7.4%</b>
Scheduled Seats	10,751,473	6.8%	7,598,844	8.6%	1,854,402	3.5%	613,055	-3.3%	52,288	-11.6%	632,884	7.4%
Charter Seats	118,823	0.0%	118,823	0.0%								
<b>Domestic Seats</b>	<b>7,187,291</b>	<b>3.3%</b>	<b>4,239,912</b>	<b>3.7%</b>	<b>1,689,470</b>	<b>4.2%</b>	<b>589,005</b>	<b>-3.8%</b>	<b>52,288</b>	<b>-11.6%</b>	<b>616,616</b>	<b>7.7%</b>
Scheduled Seats	7,122,155	3.4%	4,174,776	3.7%	1,689,470	4.2%	589,005	-3.8%	52,288	-11.6%	616,616	7.7%
Charter Seats	65,136	0.0%	65,136	0.0%								
<b>US West</b>	<b>6,283,265</b>	<b>2.4%</b>	<b>3,425,543</b>	<b>1.9%</b>	<b>1,599,813</b>	<b>4.6%</b>	<b>589,005</b>	<b>-3.8%</b>	<b>52,288</b>	<b>-11.6%</b>	<b>616,616</b>	<b>7.7%</b>
Anchorage	64,998	3.0%	51,025	-0.3%	10,519	-1.5%	3,454	175.0%				
Bellingham	113,332	77.8%	75,787	35.9%	37,545	369.7%						
Boise	10,481	NA	10,481	NA								
Denver	121,956	22.7%	79,537	57.8%	24,843	-12.1%	8,788	-23.4%			8,788	-4.8%
Eugene	11,819	524.4%	11,819	524.4%								
Fresno	12,042	74.9%	12,042	74.9%								
Las Vegas	260,670	-7.2%	260,670	0.8%	0	-100.0%						
Los Angeles	2,198,310	-1.2%	1,102,489	-4.1%	564,275	7.6%	218,207	-5.9%	50,768	-6.0%	262,571	-1.0%
Oakland	374,876	6.6%	110,981	-10.4%	149,285	20.6%	57,305	12.0%			57,305	8.6%
Orange County	0	-100.0%	0	-100.0%	0	-100.0%						
Phoenix	471,030	0.7%	248,540	1.9%	99,750	-2.4%	60,610	0.0%			62,130	1.9%
Phoenix Mesa	31,220	NA	31,220	NA								
Portland	271,004	7.2%	149,442	-0.4%	93,616	12.1%	13,973	0.0%			13,973	169.7%
Sacramento	149,285	-6.9%	91,980	-0.6%	57,305	-15.5%						
Salt Lake City	91,246	-2.2%	91,246	-2.2%								
San Diego	247,395	10.8%	153,980	1.3%	69,394	-2.6%					24,021	NA
San Francisco	808,450	-7.4%	484,401	-2.1%	158,134	-14.6%	101,696	-16.0%	1,520	-70.5%	62,699	-6.1%
San Jose	355,472	5.4%	92,837	-23.4%	148,025	32.0%	57,305	8.6%			57,305	12.0%
Santa Maria	10,258	441.9%	10,258	441.9%								
Seattle	657,121	5.6%	334,508	10.2%	187,122	-1.1%	67,667	-0.7%			67,824	10.8%
Spokane	10,481	NA	10,481	NA								
Stockton	11,819	657.1%	11,819	657.1%								
<b>US East</b>	<b>838,890</b>	<b>10.8%</b>	<b>749,233</b>	<b>12.7%</b>	<b>89,657</b>	<b>-2.8%</b>						
Atlanta	108,770	-0.6%	108,770	-0.6%								
Chicago	124,310	-2.5%	116,778	-0.7%	7,532	-24.1%						
Dallas	246,375	-0.3%	164,250	-0.3%	82,125	-0.3%						
Houston	98,185	12.0%	98,185	12.0%								
New York JFK	97,455	73.8%	97,455	73.8%								
New ark	85,775	2.3%	85,775	2.3%								
Wash. DC	78,020	71.1%	78,020	71.1%								

Source: Scheduled seats from OAG and Dico schedules, charter seats estimated based on reports from State of Hawaii DOT Airports Division

**Total Seats to Hawaii by Port of Entry and MMA: 2013 (estimated) vs 2012 (continue)**

	STATE		HONOLULU		KAHULUI		KONA		HILO		LIHU'E	
	2013E	%Chge	2013E	%Chge	2013E	%Chge	2013E	%Chge	2013E	%Chge	2013E	%Chge
<b>Int'l Seats</b>	<b>3,683,005</b>	<b>13.9%</b>	<b>3,477,755</b>	<b>14.9%</b>	<b>164,932</b>	<b>-2.8%</b>	<b>24,050</b>	<b>12.2%</b>			<b>16,268</b>	<b>-1.0%</b>
Scheduled Seats	3,629,318	14.1%	3,424,068	15.2%	164,932	-2.8%	24,050	12.2%			16,268	-1.0%
Charter Seats	53,687	0.0%	53,687	0.0%								
<b>Japan</b>	<b>2,113,607</b>	<b>14.5%</b>	<b>2,113,607</b>	<b>14.5%</b>								
Fukuoka	168,630	42.7%	168,630	42.7%								
Nagoya	171,915	11.5%	171,915	11.5%								
Osaka	321,668	2.1%	321,668	2.1%								
Sapporo	39,312	477.8%	39,312	477.8%								
Tokyo HND	308,186	5.6%	308,186	5.6%								
Tokyo NRT	1,103,896	15.0%	1,103,896	15.0%								
<b>Canada</b>	<b>356,977</b>	<b>-2.0%</b>	<b>151,727</b>	<b>-3.3%</b>	<b>164,932</b>	<b>-2.8%</b>	<b>24,050</b>	<b>12.2%</b>			<b>16,268</b>	<b>-1.0%</b>
Calgary	38,318	-22.8%	7,211	-43.8%	31,107	-15.4%						
Edmonton	10,293	11.9%			10,293	11.9%						
Vancouver	305,238	0.9%	141,388	0.3%	123,532	-0.1%	24,050	12.2%			16,268	-1.0%
Victoria	3,128	0.0%	3,128	0.0%								
<b>Other Asia</b>	<b>481,968</b>	<b>18.1%</b>	<b>481,968</b>	<b>18.1%</b>								
Seoul	438,000	15.5%	438,000	15.5%								
Shanghai	42,968	47.9%	42,968	47.9%								
Taipei	1,000	NA	1,000	NA								
<b>Oceania</b>	<b>397,021</b>	<b>41.5%</b>	<b>397,021</b>	<b>41.5%</b>								
Auckland	72,370	120.6%	72,370	120.6%								
Brisbane	43,848	498.3%	43,848	498.3%								
Melbourne	34,542	621.0%	34,542	621.0%								
Sydney	246,261	4.5%	246,261	4.5%								
<b>Other</b>	<b>279,745</b>	<b>-0.7%</b>	<b>279,745</b>	<b>-0.7%</b>								
Apia	8,424	1.0%	8,424	1.0%								
Christmas Isle	6,240	-1.3%	6,240	-1.3%								
Guam	98,185	2.3%	98,185	2.3%								
Majuro	23,712	-4.3%	23,712	-4.3%								
Manila	95,196	0.8%	95,196	0.8%								
Nadi	8,424	-1.9%	8,424	-1.9%								
Pago Pago	26,460	-11.8%	26,460	-11.8%								
Papeete	13,104	-1.9%	13,104	-1.9%								

Source: Scheduled seats from OAG and Dio schedules, charter seats estimated based on reports from State of Hawaii DOT Airports Division