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NEWS RELEASE

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HTA RELEASES AIRLINE SEAT CAPACITY OUTLOOK FOR FOURTH QUARTER 2011

The Hawai'i Tourism Authority (HTA), the state's tourism agency, has released its Airline Seat Capacity Outlook Report for the fourth quarter of 2011. The HTA's projections are based on flights appearing in OAG and Sabre airline schedules as of September 2011.

After slowing in the second and third quarters, the number of scheduled nonstop air seats operated to Hawai'i is expected to edge 1.0 percent up over prior year levels in the closing quarter of 2011, according to the HTA's scheduled Airline Seat Capacity Outlook Report for the months of October - December 2011.

Quarterly Total Scheduled Nonstop Air Seats to Hawai'i

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter Forecast
2011	2,326,688	2,303,612	2,364,133	2,289,921
2010	2,227,202	2,308,181	2,387,334	2,267,523
%Change	+4.5%	-0.2%	-1.0%	+1.0%

- Increases in fourth quarter international capacity from Japan (+3.4%), Canada (+6.6%), Other Asia (+92.3%) and Oceania (+27.1%) are expected to offset reductions in service from the U.S. West (-0.8%) and U.S. East (-17.9%) major market areas.
- Scheduled air seat capacity to Hawai'i from Japan is expected to rise 3.4 percent in the fourth quarter, pushed upwards by year-over-year air service increases from Hawaiian Airlines, China Airlines and All Nippon Airways, which offset decreases resulting from Japan Airlines' downsizing of aircraft in the Hawai'i market from B747-400s to B767s. In addition, with travel demand to Hawai'i returning more quickly than the continental U.S., the +3.4 percent increase in seats to Hawai'i significantly out-paces a projected +0.6 percent fourth quarter rise in nonstop seats from Japan to the U.S. Mainland.
- From the Other Asia region, new flights by Asiana Airlines combined with previously launched service by Hawaiian Airlines and increased service by Korean Air boosted Seoul-Honolulu seats by 78.1 percent in the fourth quarter. China Eastern Airlines' new flights from Shanghai also contribute to the near-doubling of fourth quarter capacity from Asian markets outside of Japan.

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- From the Oceania region, air seats from Australia are expected to rise 28.4 percent in the fourth quarter, driven upwards by the launch of new Melbourne and Brisbane flights by Air Australia, and increased service from Sydney by Hawaiian Airlines and Jetstar.
- Meanwhile, air seats from Canada are expected to rise 6.6 percent, supported by a rise in seats from Vancouver and Calgary by Air Canada, and additional WestJet capacity from Vancouver, Calgary and Edmonton.
- On the domestic front, total scheduled seat capacity from the U.S. Mainland is expected to decrease 3.0 percent in the fourth quarter as U.S. carriers pull down capacity nationwide in the face of rising fuel prices. Scheduled seat capacity from the state's core U.S. West market is expected to run slightly below (-0.8%) prior year levels in the closing quarter of the year, while seats from U.S. East are expected to decrease 17.9 percent.
- The projected 1.0 percent rise in fourth quarter capacity puts total Calendar Year 2011 scheduled air seats to the state on track to reach a total of just more than 9,284,000 seats by the end of the year – an increase of 1.0 percent over 2010 levels, and the largest number of annual seats operated to Hawai'i since capacity first started declining in 2008.

For a copy of the complete Airline Seat Capacity Outlook Report for October-December 2011, please visit the Infrastructure Research page of the HTA's Tourism Research Division website:

www.hawaiiauthority.org/research-reports.

As a knowledge-based organization, the Hawai'i Tourism Authority's Tourism Research Division (TRD) provides statistical and analytical information and conducts special research on Hawai'i's visitor industry that aids state marketing efforts, industry planning, tourism policymaking and facilitates sustainable tourism. The TRD team produces timely and relevant daily, monthly, quarterly and annual research reports as well as offers technical assistance and fulfillment of requests for visitor data. For more information or to download research reports please visit

www.hawaiiauthority.org/research-reports.

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OCTOBER - DECEMBER 2011: Scheduled Nonstops Seats to Hawai'i by Port Entry and MMA*

DepCity	STATE		HONOLULU		KAHULUI		KONA		HILO		LIHUE	
	2011	%	2011	%	2011	%	2011	%	2011	%	2011	%
TOTAL	2,289,921	1.0%	1,591,786	0.5%	412,055	-3.3%	141,408	-7.2%	16,642	NA	128,030	21.7%
US TOTAL	1,592,413	-3.0%	937,859	-6.3%	373,800	-4.8%	138,406	-4.0%	16,642	NA	125,706	21.2%
US WEST	1,424,032	-0.8%	792,202	-3.5%	351,076	-4.3%	138,406	-4.0%	16,642	NA	125,706	21.2%
Anchorage	18,212	22.1%	14,444	27.8%	3,768	4.3%						
Bellingham	14,444	NA	14,444	NA								
Denver	33,387	-9.6%	21,087	-16.3%	6,832	3.7%	2,920	4.3%			2,548	7.7%
Las Vegas	63,744	-2.8%	59,712	1.1%	4,032	-38.5%						
Los Angeles	517,809	0.6%	265,050	-3.2%	117,317	-9.5%	55,062	-0.8%	14,444	NA	65,936	18.2%
Oakland	52,828	23.1%	23,940	1.1%	14,444	10.2%	6,123	0.0%			8,321	NA
Orange County	6,944	-3.4%	3,472	-33.3%	3,472	75.0%						
Phoenix	104,504	-3.8%	57,764	6.7%	22,800	-19.5%	12,350	-5.8%			11,590	-11.6%
Portland	80,280	0.6%	37,628	0.0%	37,628	0.0%	5,024	10.3%				
Sacramento	37,628	0.0%	23,184	0.0%	14,444	0.0%						
Salt Lake City	23,912	23.0%	23,912	23.0%								
San Diego	44,693	18.8%	30,249	30.5%	14,444	0.0%						
San Francisco	215,461	-18.8%	115,094	-27.6%	51,031	-2.5%	30,394	-15.2%	2,198	NA	16,744	-7.2%
San Jose	52,072	38.4%	23,184	0.0%	14,444	135.9%	8,321	0.0%			6,123	NA
Seattle	158,114	-5.5%	79,038	-4.7%	46,420	-10.9%	18,212	1.8%			14,444	0.0%
US EAST	168,381	-17.9%	145,657	-18.9%	22,724	-11.3%						
Atlanta	27,416	0.0%	27,416	0.0%								
Chicago	38,800	-20.2%	36,776	-15.8%	2,024	-58.9%						
Dallas	62,100	0.0%	41,400	0.0%	20,700	0.0%						
Detroit	0	-100.0%	0	-100.0%								
Houston	20,520	-19.0%	20,520	-19.0%								
Minneapolis	0	-100.0%	0	-100.0%								
New York	19,545	-2.1%	19,545	-2.1%								

* HTA analysis based on scheduled flights from OAG flight schedules and Sabre database as of September 2011, subject to change

OCTOBER - DECEMBER 2011: Hawai'i Scheduled Air Seats Outlook (cont')*

DepCity	STATE		HONOLULU		KAHULUI		KONA		HILO		LIHUE	
	2011	%	2011	%	2011	%	2011	%	2011	%	2011	%
INTERNATIONAL	697,508	11.3%	653,927	12.2%	38,255	13.3%	3,002	-63.5%	0	NA	2,324	55.6%
JAPAN	399,718	3.4%	399,718	5.0%			0	-100.0%				
Fukuoka	836	NA	836	NA								
Nagoya	33,151	46.1%	33,151	46.1%								
Osaka	69,920	30.8%	69,920	30.8%								
Tokyo HND	73,324	97.5%	73,324	97.5%								
Tokyo NRT	222,487	-18.6%	222,487	-16.8%			0	-100.0%				
CANADA	83,475	6.6%	39,894	-2.4%	38,255	13.3%	3,002	41.1%	0	NA	2,324	55.6%
Calgary	8,367	36.7%	2,186	-13.7%	6,181	72.3%						
Edmonton	664	NA			664	NA						
Vancouver	73,900	4.2%	37,164	0.1%	31,410	4.0%	3,002	41.1%			2,324	55.6%
Victoria	544	-55.6%	544	-55.6%								
OTHER ASIA	85,995	92.3%	85,995	92.3%								
Seoul	79,681	78.1%	79,681	78.1%								
Shanghai	6,314	NA	6,314	NA								
OCEANIA	59,439	27.1%	59,439	27.1%								
Auckland	7,254	18.4%	7,254	18.4%								
Brisbane	2,010	NA	2,010	NA								
Melbourne	2,010	NA	2,010	NA								
Sydney	48,165	18.5%	48,165	18.5%								
OTHER	68,881	-1.8%	68,881	-1.8%								
Apia	2,106	-7.1%	2,106	-7.1%								
Christmas Island	1,924	8.8%	1,924	8.8%								
Guam	22,086	12.4%	22,086	12.4%								
Majuro	6,123	-26.4%	6,123	-26.4%								
Manila	23,916	2.2%	23,916	2.2%								
Nadi	2,106	-49.2%	2,106	-49.2%								
Pago Pago	7,344	0.5%	7,344	0.5%								
Papeete	3,276	0.0%	3,276	0.0%								

* HTA analysis based on scheduled flights from OAG flight schedules and Sabre database as of September 2011, subject to change