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HAWAII TOURISM
AUTHORITY

HTA Airline Seat Capacity Outlook for Second Quarter 2020

The Hawaii Tourism Authority (HTA), the state's tourism agency, forecasts that total scheduled nonstop air seats to Hawaii in the second quarter of 2020 will decrease by 11.5 percent as compared with the same quarter of 2019. The projection is based on flights appearing in Diio Mi airline schedules as of March 2020.

Because of the Coronavirus outbreak, the decrease in the scheduled air seats are expected to occur in all major market areas: U.S. West (-3.2%), U.S. East -7%), Japan (-24.3%), Canada (-60.6%), Other Asia (-39.1%), and Oceania (-52.3%).

Outlook for Scheduled Nonstop Air Seats to Hawaii

	2020 Q2 Forecast	2019 Q2	% Change	2020 YTD thru Q2 Forecast	2019 YTD thru Q2	% Change
TOTAL	2,995,650	3,383,887	-11.5	6,465,732	6,702,620	-3.5
DOMESTIC	2,402,692	2,494,774	-3.7	4,940,122	4,774,353	3.5
US WEST	2,125,759	2,196,965	-3.2	4,313,237	4,177,896	3.2
US EAST	276,933	297,809	-7.0	626,885	596,457	5.1
INTERNATIONAL	592,959	889,113	-33.3	1,525,610	1,928,267	-20.9
JAPAN	359,904	475,392	-24.3	842,161	981,290	-14.2
CANADA	37,582	95,344	-60.6	221,560	306,686	-27.8
OTHER ASIA	69,242	113,614	-39.1	159,138	243,011	-34.5
OCEANIA	59,726	125,146	-52.3	158,775	241,091	-34.1
OTHER	66,505	79,617	-16.5	143,976	156,189	-7.8

Source: Diio Mi airline database, as of March 2020

U.S. West

The scheduled air seats from the U.S. West are expected to decrease (-3.2%) during the second quarter of 2020, compared to the same quarter last year. The decrease is a result of decreased service from Salt Lake City (-32.6%), Los Angeles (-20%), Las Vegas (-11.9%), Denver (-9.6%), Anchorage (-8.1%) and Portland (-7.9%) as well as cancelled flights from Bellingham, offsetting the increase from San Jose (+51%), San Diego (+44.8%), Sacramento (+35%) and Oakland (+11.7%).

U.S. East

Seat capacity in Q2 2020 from the U.S. East market is expected to be down (-7%), driven by Detroit (-50%), Atlanta (-43.3%), Minneapolis (-42.5%), Boston (-17.6%), and New York JFK (-14.3%), but only Chicago increases the air seats by 16.8 percent.

Japan

Scheduled nonstop air seats from Japan are expected to decrease by 24.3 percent in the second quarter of 2020, with the largest decrease from Tokyo NRT (-45.5%), followed by Osaka (-37.1%) and Nagoya (-34.7%) as well as the cancelled flights from Sapporo, offsetting the increase from Tokyo HND (+76.4%) and Fukuoka (-23%).

Canada

Nonstop air seats from Canada to Hawai'i are expected to decrease (60.6%). This is a result of decreases from Calgary (-89.7%) and Vancouver (-55.3%). In addition, a lot of cancelled flights are from Edmonton Toronto.

Other Asia

This market is expected to see a decrease in scheduled air seats (-39.1%) from April to June 2020. The decrease is anticipated from Taipei (-40%) and Seoul (-11.7%), and the cancelled flights are from Beijing and Shanghai that promote the seat capacity down turn as well.

Oceania

Scheduled air seats from Oceania are expected to decrease (-52.3%) in the second quarter 2020, due to Brisbane (-69.2%), Sydney (-62.2%), Auckland (-37.6%) and Melbourne (-17.5%).

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

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