

HTA COVID-19 UPDATE

(Issued: 3/24/20 @ 1:30pm)

Impact on Wholesale Partners

US: All wholesalers are working around the clock handling booking cancellations.

UK: Prime Minister Boris Johnson advised that strict new rules would be imposed, banning everyone from leaving their homes except for essential work, trips to buy food/medicine or for a single session of exercise once per day. All gatherings of more than 2 people (exception larger family) are strictly prohibited and police will be able to enforce these rules. All non-essential shops must close with immediate effect. GERMANY: The German government has now extended the travel ban for international and domestic trips until 4/30. No events/ meetings with more than 5 people are allowed in most German states; with the exception of Bavaria where the rule is 2 people. Tui Deutschland & DER Touristik cancelled all bookings through 4/20.

SOUTHEAST ASIA: Malaysia government has announced that citizens are allowed to take out a small portion of their Employees Provident Fund (Malaysia's version of the 401k) starting April and for 12 months to assist during this pandemic.

SOUTH KOREA: 76 new cases of COVID-19, which were detected on Monday. Slightly up from 64 new cases a day earlier. Total cases are now at 9,037. Celltrion, Korean biopharmaceutical expects to have a COVID-19 treatment available to injection as early as July. The treatment under development is a "neutralizing antibody", which by itself is only effective as a vaccine for healthy people or as a treatment for COVID-19 patients experiencing milder symptoms. The treatment will be available to be injected for human clinical tests after late July.

CHINA: 81,749 total cases, 78 more compared to yesterday.

Department of Health Update

COVID-19 Positive* Cases Cumulative totals as of 12:00pm on March 24, 2020

Total (new)	90 (14)
County of Hawaii	2 (0)
City & County of Honolulu	58 (10)
County Kauai	1 (0)
County of Maui	9 (0)
U.S. Non-Hawaii Residents	11 (3)
International Residents	3 (0)
Pending	6 (1)
Required Hospitalization	6 (2)
Deaths	1 (1)

* includes presumptive and confirmed cases, and Hawaii and non-Hawaii residents; data are preliminary and subject to change; note that CDC provides case counts according to states of residence.

Impact on Airlines

QANTAS/JETSTAR: Both airlines will come in today and out today as their last flight from Australia, but there was an error and it could be last flight 3/25 in and 3/25 out. ANA: Has announced a temporary suspension of all Honolulu-Japan routes through 4/24.

HAWAIIAN AIR: Has announced total reduction of all of their international flights into Hawaii, furthermore, reducing all domestic services except the Hon-LAX flight effective 3/26. They will also be making reductions in interisland services.

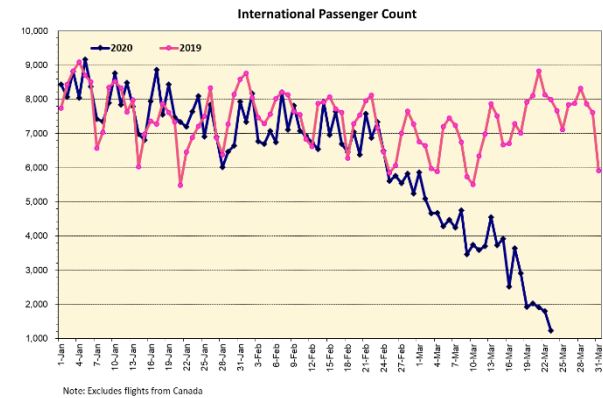
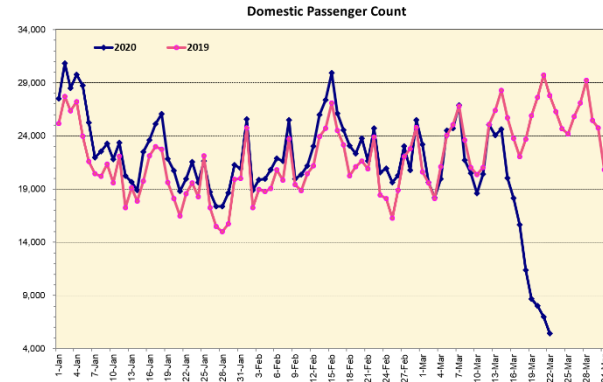
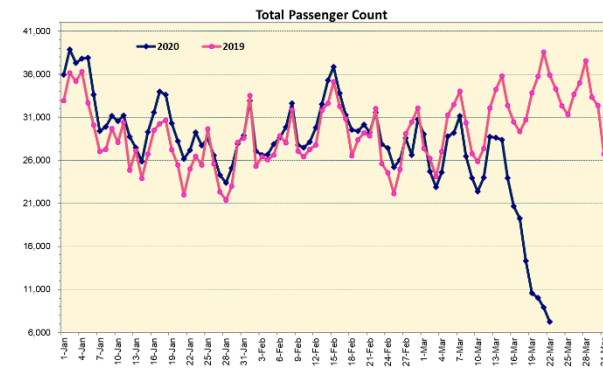
LUFTHANSA (The largest German airlines): has released all employees with medical training to volunteer for services in the medical facilities.

Impact on Hotels

Many hotels continue to prepare to close down by the end of this week as their occupancy dives down to single digit occupancy and for some 0% occupancy.

Daily Passenger Count Table

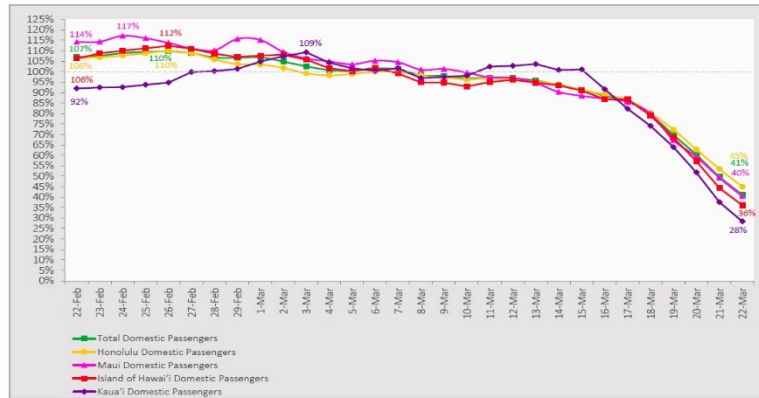
3/22/2020	Domestic	International	Total
Oahu	3,013	1,804	4,817
Maui	1,649		1,649
Island of Hawaii	449		449
Kauai	340	N/A	340
State	5,451	1,804	7,255



7-Day Domestic by Island Moving Average Daily Passenger Volume

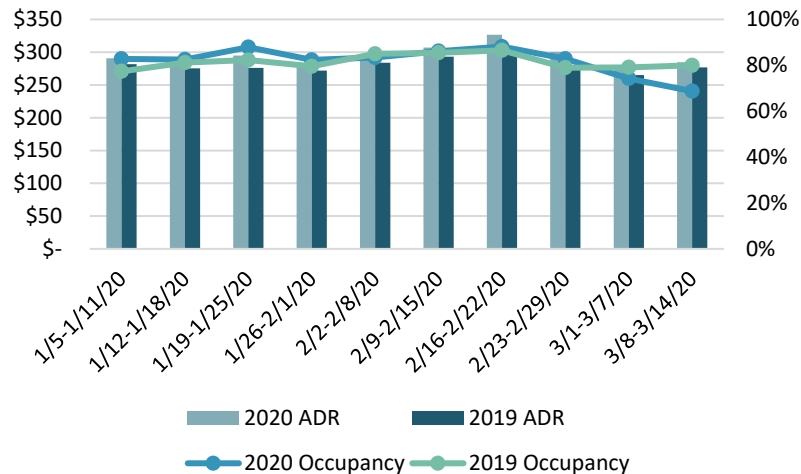
2020 Volume as Percentage of 2019 Volume

Through March 22, 2020



Source: HVCB analysis based on data from DBEDT
Note: Passenger volume figures include both visitors and residents.

State of Hawai'i Hotel Performance by Week 2020 vs 2019



Hawaii Hotel Performance Info:

For the week of March 8-14, 2020

	Occupancy	ADR	RevPAR
State of Hawaii	68.7%	\$ 284.57	\$ 195.57
Oahu	64.5%	\$ 220.68	\$ 142.24
Maui County	75.0%	\$ 417.75	\$ 313.24
Kauai County	78.0%	\$ 304.78	\$ 237.85
Island of Hawaii	70.8%	\$ 271.57	\$ 192.24
Kohala Coast	69.7%	\$ 390.31	\$ 272.18

Domestic by Island Month-to-Date and Year-to-Date Daily Passenger Volume

2020 Volume versus 2019 Volume

Through March 22, 2020

March 2020 (Month-to-Date through March 22)

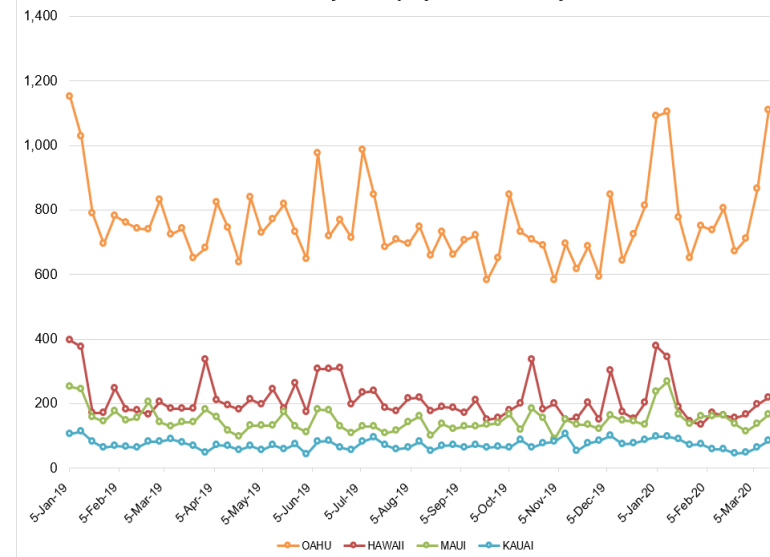
	2020	2019	Volume Change	Percent Change
Honolulu	219,509	276,849	-57,340	-20.7%
Maui County	102,151	129,625	-27,474	-21.2%
Island of Hawai'i	49,587	65,553	-15,966	-24.4%
Kaua'i	35,299	45,561	-10,262	-22.5%
Total	406,546	517,588	-111,042	-21.5%

2020 (Year-to-Date through March 22)

	2020	2019	Volume Change	Percent Change
Honolulu	956,503	947,400	+9,103	+1.0%
Maui County	443,316	426,246	+17,070	+4.0%
Island of Hawai'i	215,118	218,150	-3,032	-1.4%
Kaua'i	148,507	153,448	-4,941	-3.2%
Total	1,763,444	1,745,244	+18,200	+1.0%

Source: HVCB analysis based on data from DBEDT
Note: Passenger volume figures include both visitors and residents. Total includes other international passengers. 2020 includes one additional day due to Leap Year (February 29th, 2020).

2020 Initial Weekly Unemployment Claims by Island



Weekly Unemployment Initial Claims: March 14, 2020

State of Hawaii	1,595
C&C of Oahu	1,108
Maui County	166
Hawaii County	217
Kauai County	84
Agent (filed in Hawaii against another state)	18

News Highlights

March 24, 2020

Hawaii News Now: [State reports first coronavirus-related death in Hawaii](#)

Hawaii News Now: [Malls, hotels and other businesses close as city's stay-at-home order takes effect](#)

The Garden Island: [Looking at lockdown](#)

Big Island Now: [Beachgoers Ignore Closures Across Big Island](#)

Hawaii Tribune-Herald: [Popular snorkel spot overrun after state closes beaches because of coronavirus](#)

West Hawaii Today: [Ironman 70.3 Hawaii postponed to Aug. 15 amid coronavirus outbreak](#)

The Los Angeles Times: [Hawaii visitors face strict 14-day quarantine upon arrival](#)

The New York Times: [Coronavirus Live Updates: As India Imposes 21-Day Lockdown, Trump Calls for U.S. to Be Open 'by Easter'](#)

Forbes: [Hawaiian Airlines Canceling Almost All Flights Between Mainland And Hawaii Starting This Week](#)

Conde Nast Traveler: [Real ID Deadline Extended Due to Coronavirus](#)

Helpful Resources

Department of Health

<https://hawaiicovid19.com/>

Department of Health

<https://health.hawaii.gov/docd/advisories/novel-coronavirus-2019>

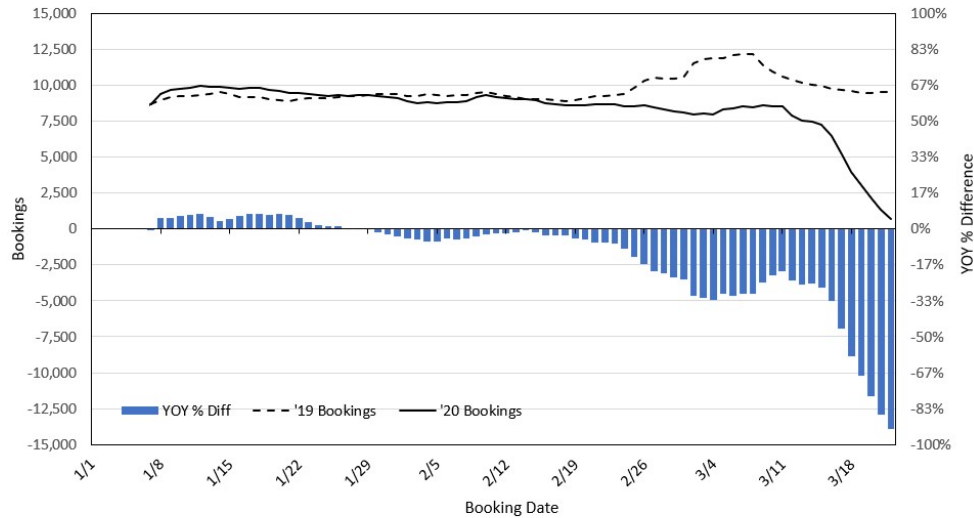
Dept. of Business, Economic Development & Tourism

<https://dbedt.hawaii.gov/economic/covid19/>

Department of Transportation

<https://hidot.hawaii.gov/coronavirus/>

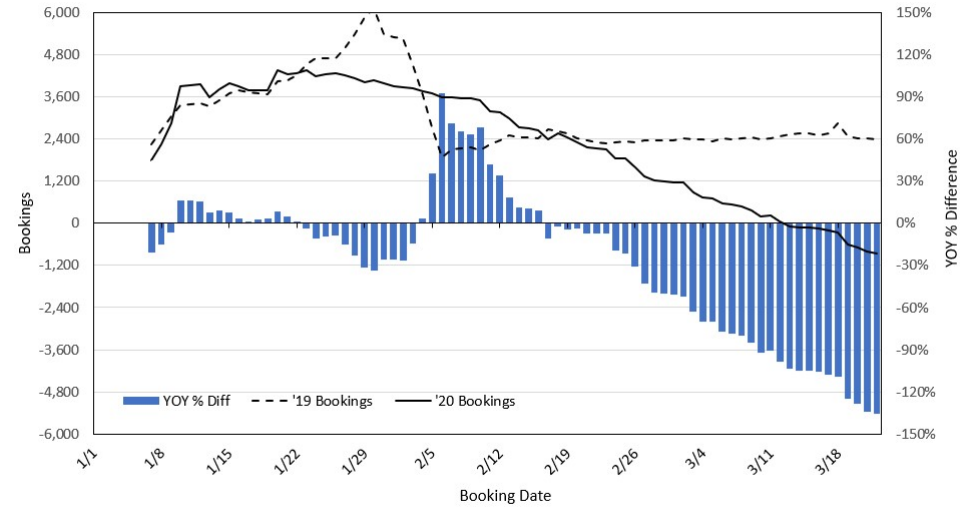
Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 U.S.



*Future Arrivals refers to all arrivals that are 'future' relative to the referenced booking date.
Source: Global Agency Pro

Update: Mar 22, 2020

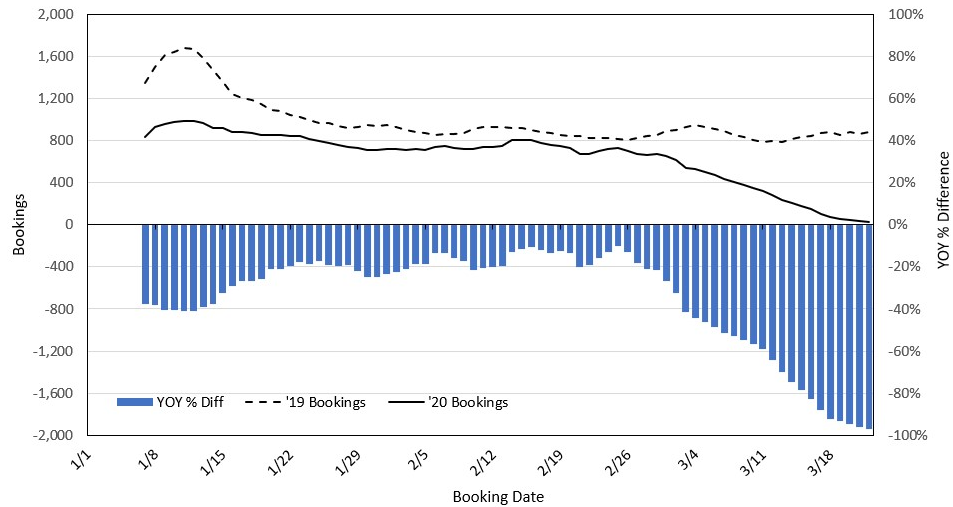
Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 Japan



*Future Arrivals refers to all arrivals that are 'future' relative to the referenced booking date.
Source: Global Agency Pro

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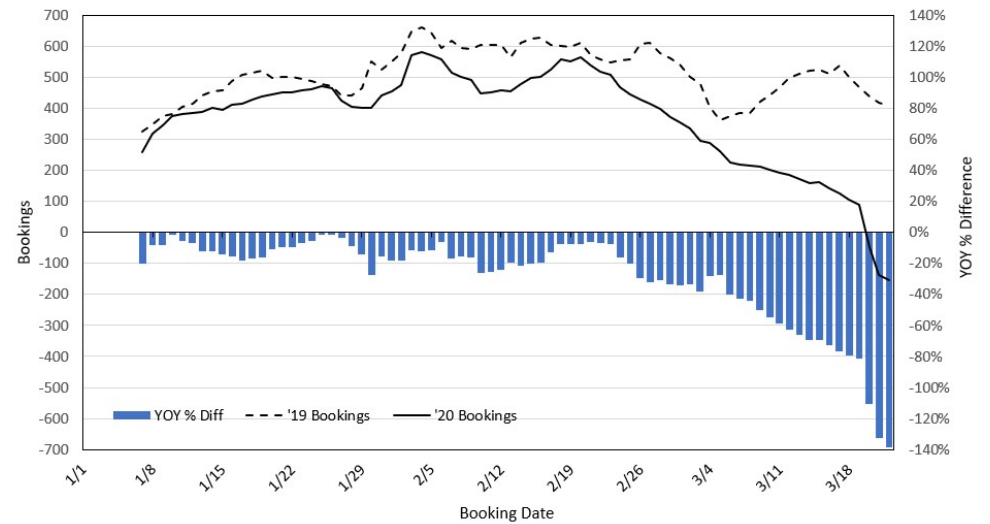
Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 Canada



*Future Arrivals refers to all arrivals that are 'future' relative to the referenced booking date.
Source: Global Agency Pro

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Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 Australia



*Future Arrivals refers to all arrivals that are 'future' relative to the referenced booking date.
Source: Global Agency Pro

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