

HTA COVID-19 UPDATE

(Issued: 3/25/20 @ 1:30pm)

Impact on Wholesale Partners

SOUTH KOREA: The daily confirmed imported cases accounted for 51% of the new infections. The South Korean government will require all arrivals from the States to go under a 14-day self-quarantine starting from 3/27. According to Incheon International Airport, the daily number of passengers fell to an all-time low of 9,316 passengers on 3/24, marking the smallest daily number since the airport's opening in 2001. Korean major conglomerates such as Hyundai and Samsung are withdrawing work from home policies as they transition towards longer term "emergency management" strategies to deal with the unpredictability of the global market due to the COVID-19 break out. Instead, they will apply the flexible working hours or implement the COVID-19 task force policies.

CHINA: Total confirmed cases: 81,850. This is 47 more compared to yesterday. From 3/25, areas in Hubei province except Wuhan will lift outbound transportation restrictions. Wuhan will lift outbound travel restrictions from 4/8 after a 2 month+ lock down. Ctrip rolled out a "Recovery V Plan", James Liang, President of Ctrip conducted the very first live webinar at Douyin (Tik Tok) on the evening of 3/23. This seminar sold RMB 10 million travel products in one hour for Sanya, China.

US: Johns Hopkins reports 53,740 confirmed cases (+9,839 in a day) 706 deaths. Longwoods Travel Sentiment Study Wave 2 (fielded 3/18-3/19): 75% of those planning to travel in the next 6 months will change their plans due to COVID-19 (compared to 50% in the March 11 survey). 48% of them are cancelling completely (compared to 28% on 3/11).

CANADA: House of Commons reconvened today to pass the laws for the support for COVID-19. Both Quebec and Ontario announced that non-essential businesses would be shut down by midnight. School closures originally set until 4/6 have extended through 4/13. The shutdowns effect 23 million people in the 2 provinces.

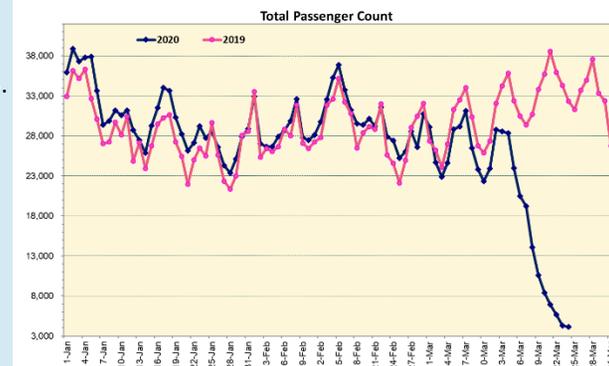
JAPAN: IOC officially announced that 2020 Olympic is postponed to 2021. The wholesalers and travel agents are reporting zero customers on Island by Thursday 3/28.

Impact on Airlines

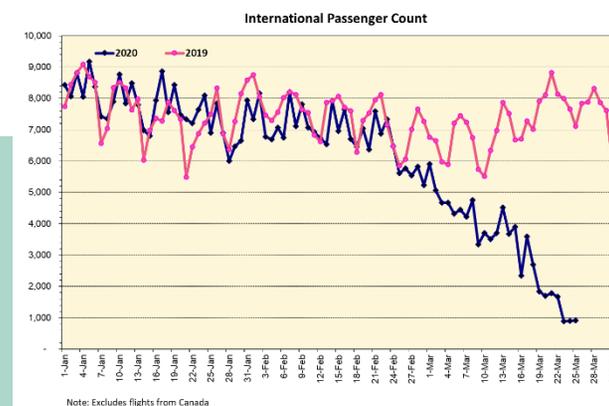
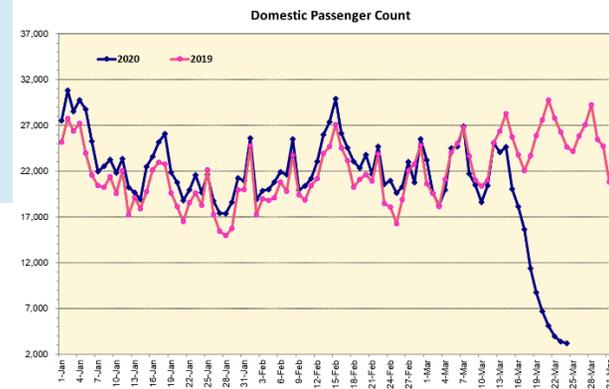
Korean Airlines still plans to fly into Honolulu 3 times per week through 4/25. They have been advised of Hawaii's COVID-19 preventative measure as in Stay in Place and 14-day self-quarantine. They and Asiana Airlines are both in discussions as to whether they will implement further decrease or even a suspension. (Korean Airlines cut back from 11 flights per week to 3).

Impact on Hotels

So far 42 hotels are closed or will be closed temporarily due to COVID-19.



Note: Excludes flights from Canada



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Department of Health Update

COVID-19 Positive* Cases Cumulative totals as of 12:00pm on March 25, 2020

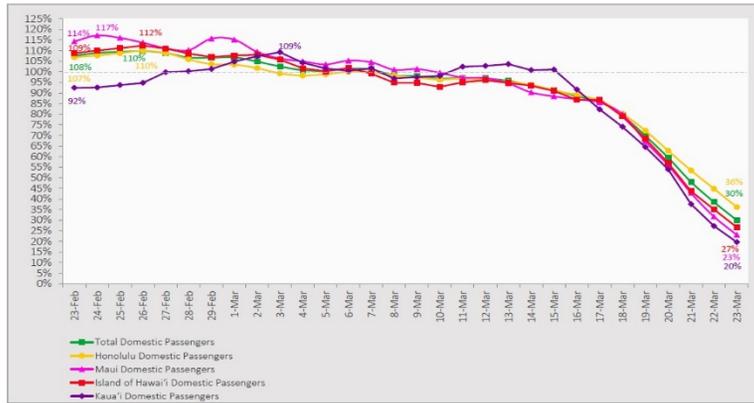
County	HI Residents	Non-HI Residents	Total
Hawaii	2 (0)	3 (0)	5 (0)
Honolulu	63 (4)	5 (0)	68 (4)
Kauai	1 (0)	4 (1)	5 (1)
Maui	10 (1)	3 (0)	12 (1)
		Pending	4 (0)
Total Required Hospitalization: 5 (0)			
Total Deaths: 0 (0)			
<i>* includes presumptive and confirmed cases, and Hawaii and non-Hawaii residents; data are preliminary and subject to change; note that CDC provides case counts according to states of residence.</i>			

Daily Passenger Count Table

3/24/2020	Domestic	International	Total
Oahu	2,430	904	3,334
Maui	399		399
Island of Hawaii	360		360
Kauai	38		38
State	3,227	904	4,131

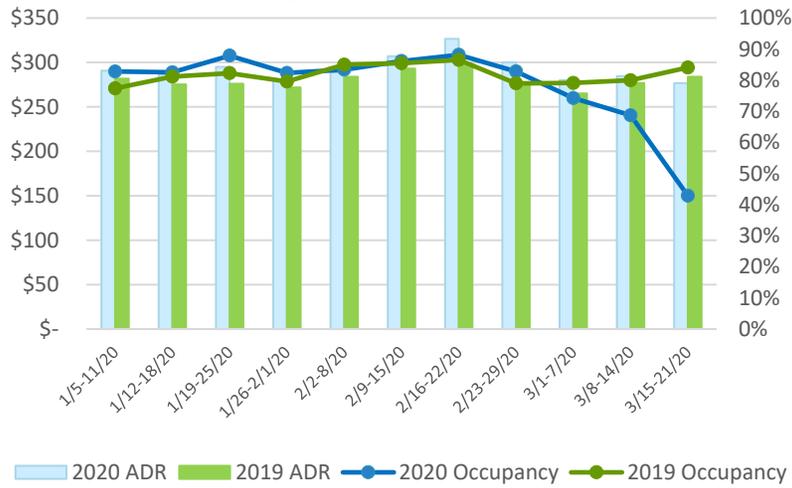
7-Day Domestic by Island Moving Average Daily Passenger Volume

2020 Volume as Percentage of 2019 Volume
Through March 23, 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



Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority

Hawaii Hotel Performance Info: For the week of March 15-21, 2020

	Occupancy	ADR	RevPAR
State of Hawaii	42.9%	\$ 276.75	\$ 118.64
Oahu	40.4%	\$ 212.36	\$ 85.83
Maui County	45.3%	\$ 415.31	\$ 187.94
Kauai County	44.8%	\$ 283.51	\$ 221.73
Island of Hawaii	48.6%	\$ 275.72	\$ 134.13
Kohala Coast	45.5%	\$ 424.47	\$ 193.10

Helpful Resources
Department of Health
<https://hawaiicovid19.com/>

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

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

2020 Volume versus 2019 Volume
Through March 23, 2020

March 2020 (Month-to-Date through March 23)

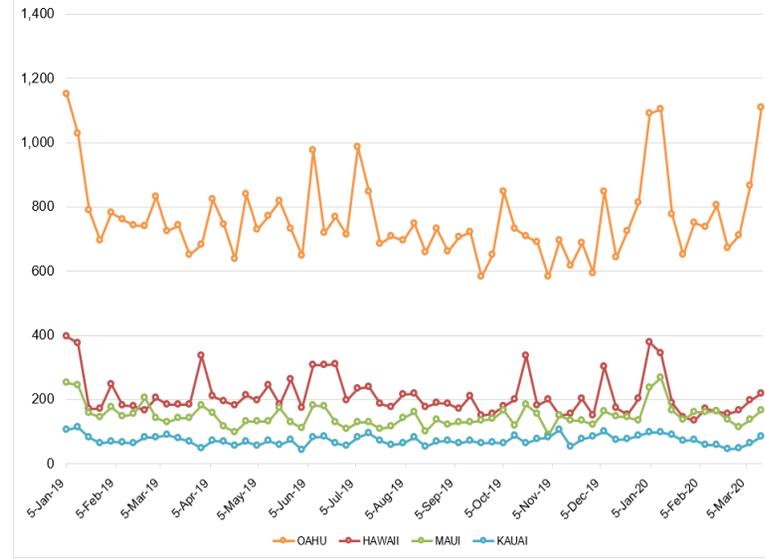
	2020	2019	Volume Change	Percent Change
Honolulu	221,547	290,987	-69,440	-23.9%
Maui County	98,885	137,656	-38,771	-28.2%
Island of Hawai'i	49,749	69,833	-20,084	-28.8%
Kaua'i	35,186	48,855	-13,669	-28.0%
Total	405,367	547,331	-141,964	-25.9%

2020 (Year-to-Date through March 23)

	2020	2019	Volume Change	Percent Change
Honolulu	958,541	961,538	-2,997	-0.3%
Maui County	440,050	434,277	+5,773	+1.3%
Island of Hawai'i	215,280	222,430	-7,150	-3.2%
Kaua'i	148,394	156,742	-8,348	-5.3%
Total	1,762,265	1,774,987	-12,722	-0.7%

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 (fled in Hawaii against another state)	18

Dept. of Business, Economic Development & Tourism
<https://dbedt.hawaii.gov/economic/covid19/>

News Highlights

March 25, 2020

KHON2: [14 new cases of coronavirus, bringing statewide total to 90](#)

Hawaii News Now: [Sweeping 'stay-at-home' order in effect statewide in effort to curb spread of coronavirus](#)

Hawaii News Now: [State backtracks on first COVID-19 death, says test results were 'misread'](#)

Honolulu Star-Advertiser: [Major hotels close across the state; job losses mount to more than 40,000 since mid-February](#)

Hawaii Public Radio: [Asia Minute: Travel Bans Growing](#)

Honolulu Star-Advertiser: [As popular Hawaii hiking trails close amid coronavirus outbreak, several remain open](#)

The Garden Island: [Lockdown begins today](#)

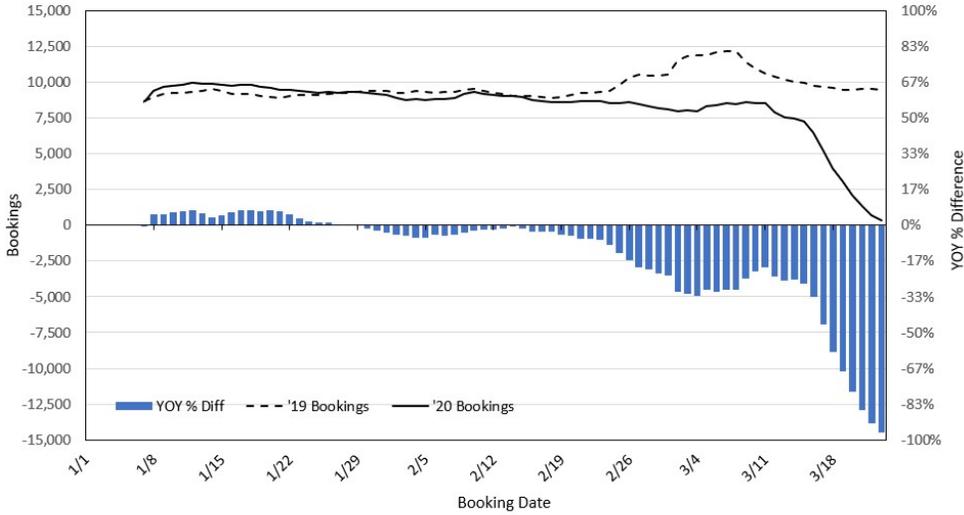
Travel Weekly: [Coronavirus aid bill to deliver benefits for travel agents](#)

USA Today: [Alaska, Florida and Hawaii force travelers to self-quarantine: What to know before you go](#)

Travel Market Report: [Hawaii to Enforce 14-Day Quarantine For All Visitors](#)

Department of Transportation
<https://hidot.hawaii.gov/coronavirus/>

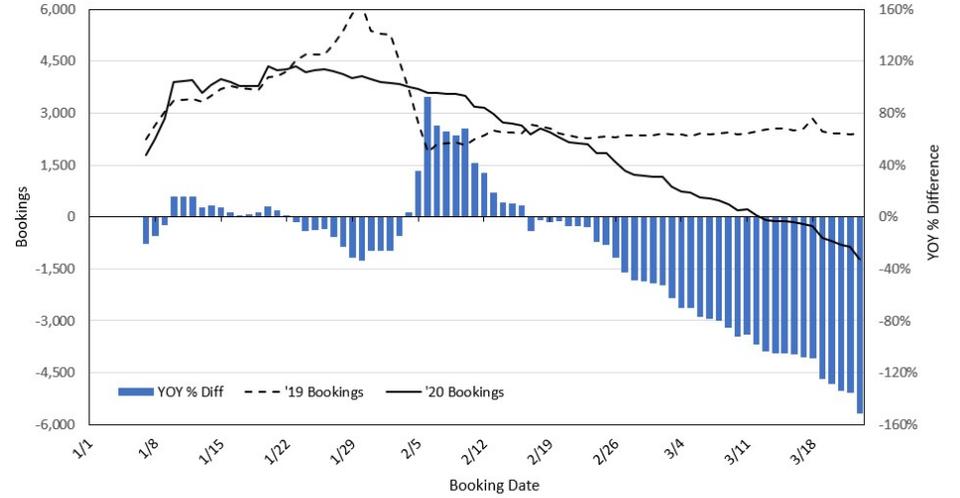
Travel Agency Bookings to Hawaii for Future Arrivals*
Based on a 7-day Moving Average, 2020 vs 2019
U.S.



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

Update: Mar 23, 2020

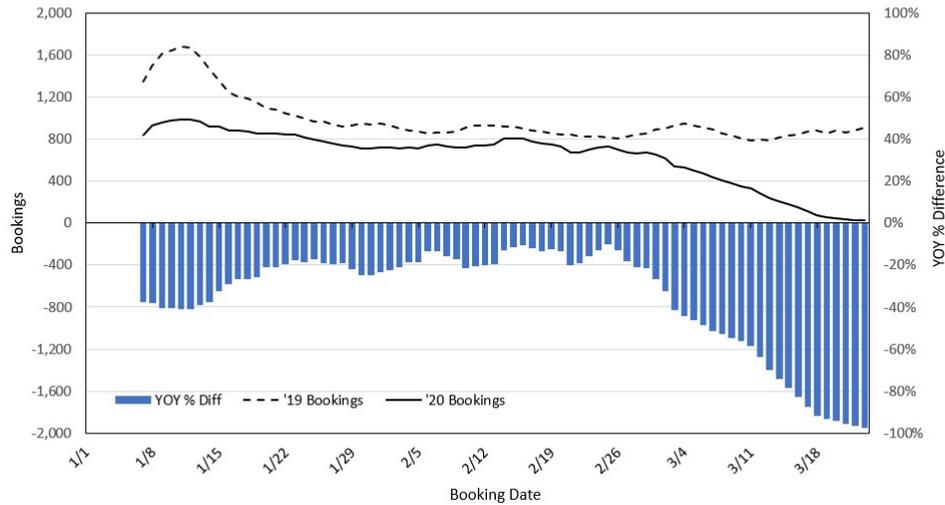
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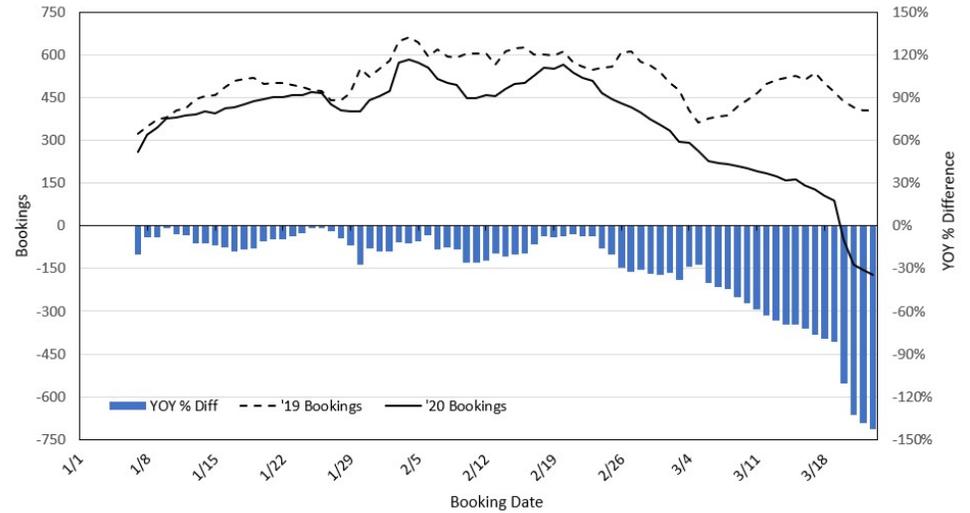
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Travel Agency Bookings to Hawaii for Future Arrivals*
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