

HTA COVID-19 UPDATE

(Issued: 3/30/20 @ 5:00pm)

Impact on Wholesale Partners

CHINA: Total confirmed cases: 82,451 (31 more compared to Sunday). 1 was a local case and 30 new cases were imported.

US: Has the most COVID-19 cases in the Country. Johns Hopkins reports 85,840 cases (+16,880) and 1,296 deaths. Domestic air service dropped sharply with some flights arriving with no or single digit visitors.

CANADA: Prime Minister announced loans of 40k dollars guaranteed by the government for small businesses. The government will subsidize up to 75% of the wages of small and medium businesses. Taxes (due in April) are now pushed back until June.

SINGAPORE: NATAS Travel Fair announced cancellation to curb mass gathering as suggested by the government. The travel fair was scheduled for 5/1-5/3 at the Singapore Expo.

TAIWAN: Ministry of Transportation and communications has developed plans to distribute "National Travel Vouchers" worth NTD\$500. It aims at the public whose package tour abroad has been cancelled and to direct those intended spending into local hotels and theme parks. The package underway has already included \$7.6 million subsidies and this announcement would add on to the consumer voucher planned by the Ministry of Economic Affairs.

UK: Number of deaths in England after contracting COVID-19 now stands at 1,284. The British Armed Forces will turn 3 major conference venues into temporary hospitals, BBC reports.

GERMANY: Of the 200,000 Germans who were stuck in other countries, 160,000 were brought back to Germany. There are still 40,000 left in countries which are difficult to reach (e.g. Nepal). As of today, travel advisories are effective until the end of April.

KOREA: Major luxury hotels such as Shilla, Andaz, Four Seasons, and intercontinental started aggressive package promotions through OTAs from late February in order to respond to the local resident's growing demands for 'staycation in hotels' in theme of wellness and social distancing purpose and also to refresh from the pandemic crisis.

JAPAN: The Japanese Ministry of Foreign Affairs announced that as of 3/25, areas with entry restrictions to Japan have reached 164 countries and regions. Travelers from 74 countries and regions will also be imported mandatory 14-day quarantine periods. 18 European countries as Germany and France, along with Iran, where alert levels were raised to "cancel all travels", will also be added to countries subject to entry restrictions. The 18 countries include Italy, Spain and Switzerland which are already subject to entry restrictions.

Department of Health Update

COVID-19 Positive* Cases Cumulative totals as of 12:00pm on March 30, 2020

County	204 (29)
Hawaii	15 (3)
Honolulu	139 (16)
Kauai	12 (0)
Maui	25 (5)
Pending	11 (5)
HI Residents Diagnosed Outside of HI	2 (0)
Total Required Hospitalization	12 (0)
Total Deaths	0 (0)

* 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

US: American Airlines will suspend 60% of its capacity in April and is planning to suspend up to 80% in May compared to STLY in 2019. These changes are due to significantly decreased customer demand and government travel restrictions related to COVID-19.

Visit aa.com to see April's reduced schedule posted on 3/29 and May's schedule to be posted on 4/5.

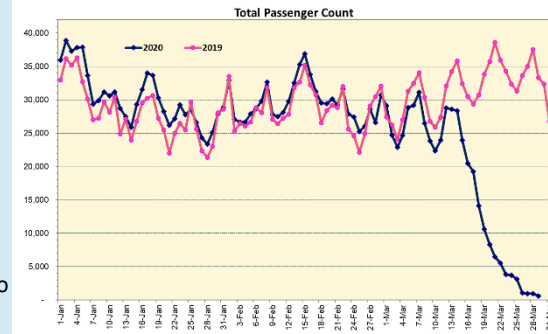
JAPAN: ANA suspended daily service from Haneda-Honolulu (3/7-4/30). Delta Air reduced services from 5 to 3 weekly flights from Nagoya-Honolulu (3/7-4/30). Also reduced service from 7 to 3 weekly flights from Kansai-Honolulu (3/7-4/30). Hawaiian Air suspends the following flights: 4x/week service from Haneda-Honolulu (3/30-4/30), thrice weekly service from Haneda-Kona (3/29-4/29), thrice weekly service from New Chitose-Honolulu (4/2-7). Reduction in flights for service from 7 to 6 weekly flights from Kansai-Honolulu (4/2-4/28) and reduction of service from 4 to 3 weekly flights from Fukuoka-Honolulu (4/5-6/1). Japan Airlines periodic suspension of daily service from Narita-Honolulu on 3/15, 3/16, 3/18 and 3/30-4/27. Reduction of service from 7 to 4 weekly flights from Narita-Honolulu (3/29-5/31). Suspension of daily service from Narita-Honolulu (4/7-4/28) and suspension of daily service from Haneda-Honolulu (4/8-4/23).

Impact on Hotels

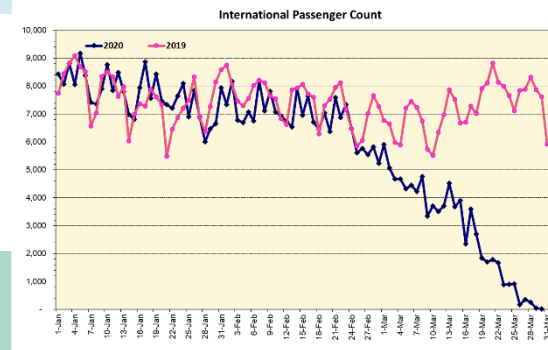
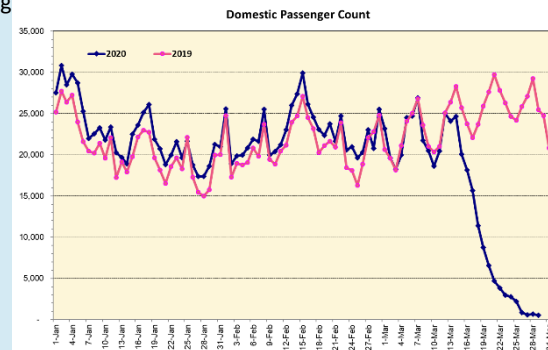
As of this morning, 107 hotels closed and 84 hotels remain open. The hotels that are open may have limited service, may not be taking new reservations etc. We were informed that 3 more hotels will close either on 3/31 or 4/1. This situation is fluid and changes frequently.

Daily Passenger Count Table

3/29/2020	Domestic	International	Total
Oahu	465	19	484
Maui	36		36
Island of Hawaii	44		44
Kauai	7		7
State	552	19	571



Note: Excludes flights from Canada

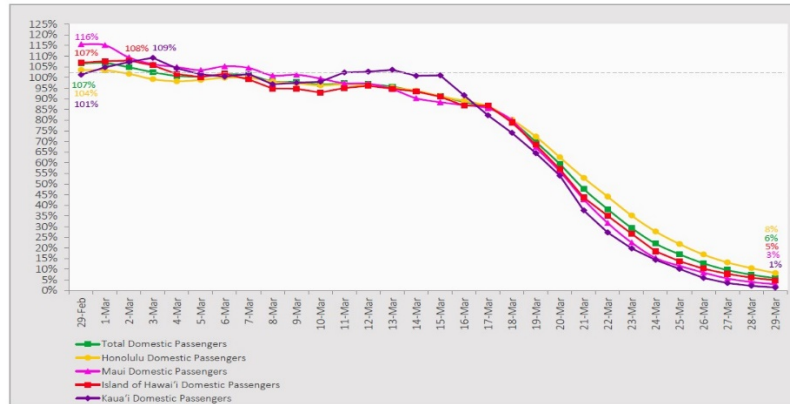


Note: Excludes flights from Canada

7-Day Domestic by Island Moving Average Daily Passenger Volume

2020 Volume as Percentage of 2019 Volume

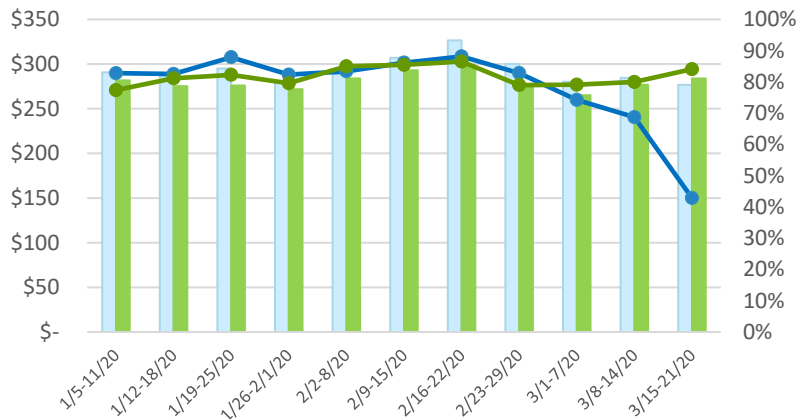
Through March 29, 2020



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

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

2020 Volume versus 2019 Volume

Through March 29, 2020

March 2020 (Month-to-Date through March 29)

	2020	2019	Volume Change	Percent Change
Honolulu	226,503	372,601	-146,098	-39.2%
Maui County	99,512	177,262	-77,750	-43.9%
Island of Hawai'i	50,475	89,484	-39,009	-43.6%
Kaua'i	35,368	63,870	-28,502	-44.6%
Total	411,858	703,217	-291,359	-41.4%

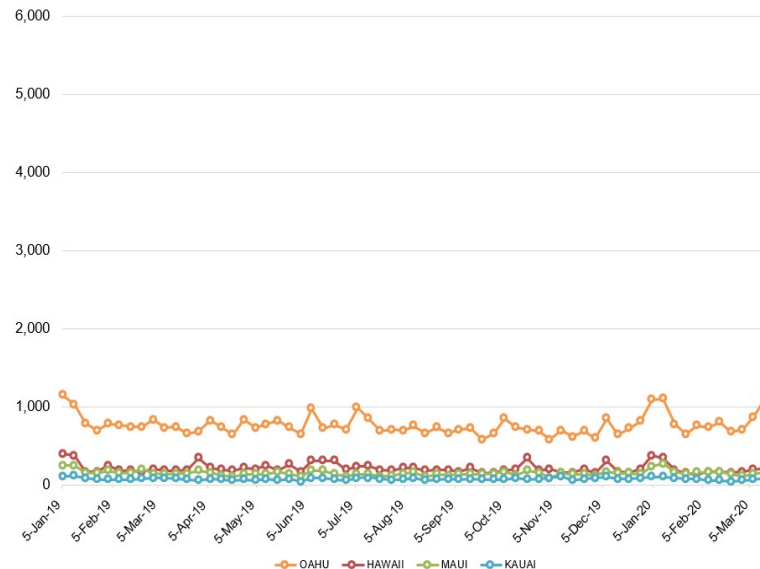
2020 (Year-to-Date through March 29)

	2020	2019	Volume Change	Percent Change
Honolulu	963,497	1,043,152	-79,655	-7.6%
Maui County	440,677	473,883	-33,206	-7.0%
Island of Hawai'i	216,006	242,081	-26,075	-10.8%
Kaua'i	148,576	171,757	-23,181	-13.5%
Total	1,768,756	1,930,873	-162,117	-8.4%

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 21, 2020

State of Hawaii	8,821
C&C of Oahu	4,837
Maui County	2,213
Hawaii County	1,019
Kauai County	698
Agent (fled in Hawaii against another state)	54

News Highlights

March 30, 2020

Hawaii News Now: [Despite statewide restriction on mass gatherings, large groups continue to meet](#)

Honolulu Star-Advertiser: [Hawaii chef group helps get food to hungry](#)

KHON2: [Over 1,200 people arrived in Hawaii on March 27](#)

Hawaii Tribune-Herald: [Hotels close doors: Majority of Kona, Kohala properties shutter, furlough staff due to COVID-19](#)

Hawaii Tribune-Herald: [Business, community, medical leaders paint grim picture of virus impact](#)

Skift: [Tourism Plummet Prompts Big Surge in Hawaii Unemployment Claims](#)

Fox: [Is Hawaii prepared for an island outbreak?](#)

Vox: [Please don't go to Hawaii on a "corona vacation" right now](#)

The New York Times: [Hawaii Tourism Grinds to Halt as Virus Restrictions Tighten](#)

Forbes: [Update: 29 U.S. States Shut Down And Counting: State-By-State Travel Restrictions](#)

CNN: [What will travel look like after coronavirus?](#)

Helpful Resources

Department of Health

<https://hawaiicovid19.com/>

Department of Health

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

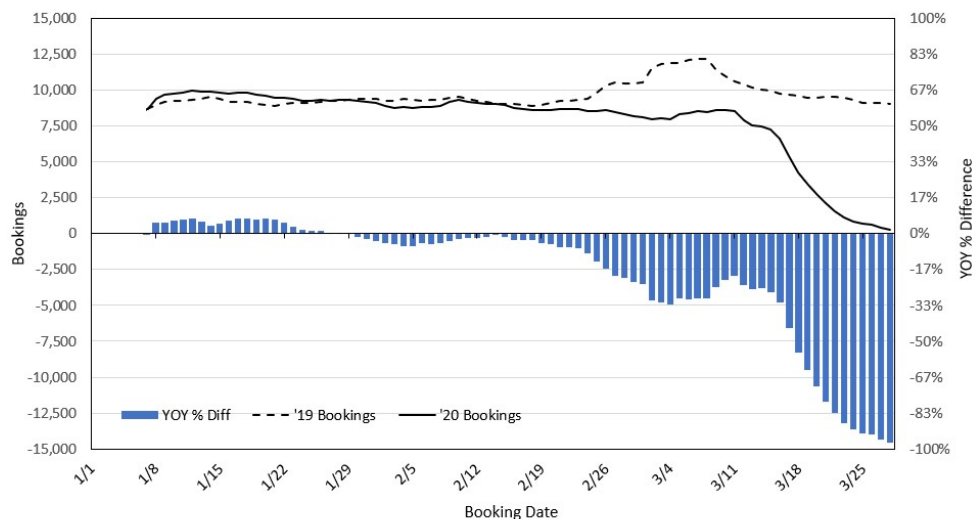
Dept. of Business, Economic Development & Tourism

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

Department of Transportation

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

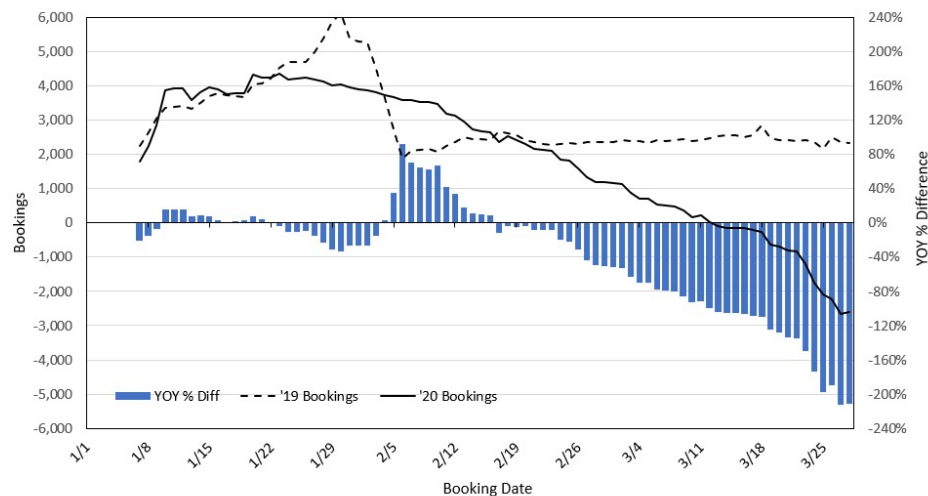
Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 U.S.



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

Update: Mar 28, 2020

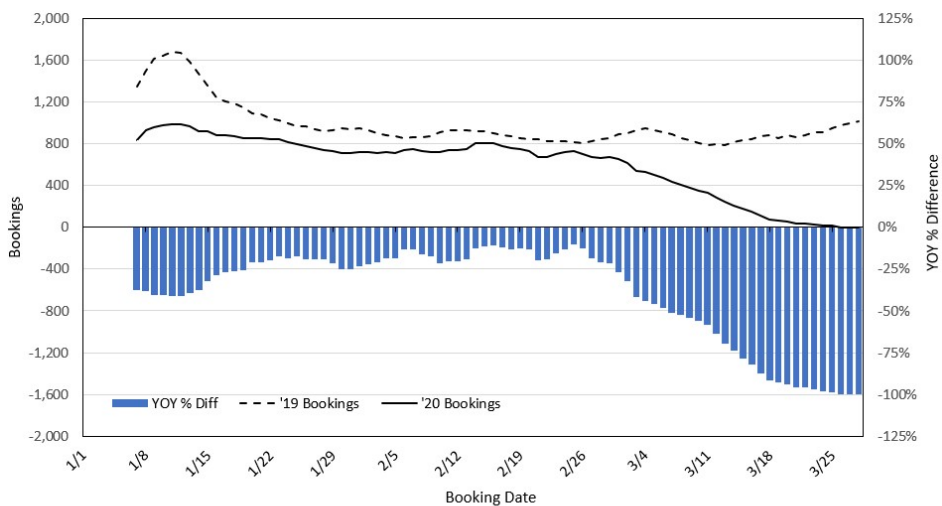
Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 Japan



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

Update: Mar 28, 2020

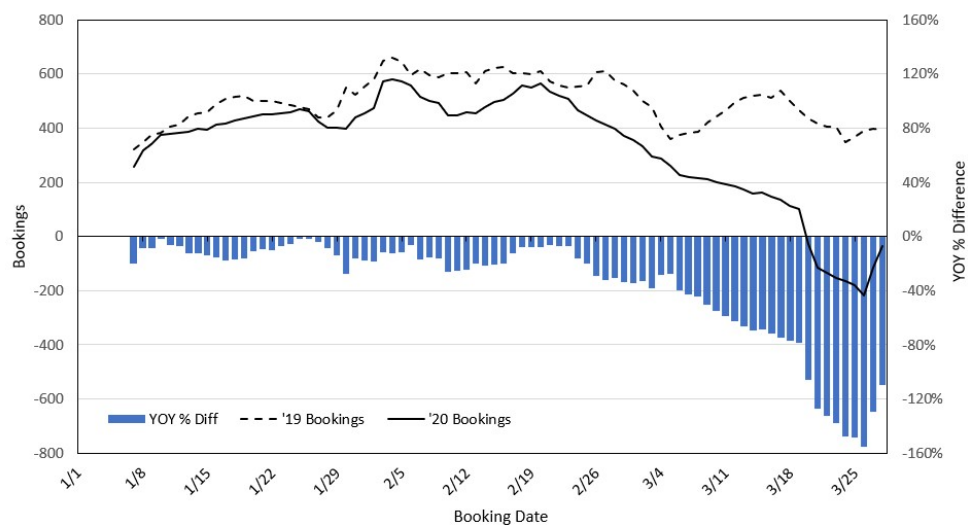
Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 Canada



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

Update: Mar 28, 2020

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

Update: Mar 28, 2020