

HTA COVID-19 UPDATE

(Issued: 4/2/20 @ 6:00pm)

Impact on Wholesale Partners

US: Johns Hopkins reports 216,515 (+27,087 today) confirmed cases, 5,115 deaths (+1,242) and 8,566 recovered. STR reports week ending March 28 that U.S. occupancy is -67% to 22.6%; ADR is -39% to US\$79.92; RevPAR at -80.3% to US\$18.05.
CHINA: Has 82,725 confirmed cases of COVID- 19. 35 new cases compared to yesterday.

CANADA: The DOH reported that there are 9,613 cases in Canada with 109 deaths and 1,541 recoveries.

UK: Total of 2,921 patients have died in hospitals after testing positive for COVID-19 as of 5pm on 4/1. Up by 569 from 2,352 the day before. As of 9am on 4/2, a total of 163,194 people have been tested of which 33,718 tested positive.

TAIWAN: During Ching-ming Festival Holiday (4/1-4/4), many travelers are expected at major attractions as domestic travel replaces outbound travel due to COVID-19. Taiwan Railway, High Speed Rail and other public transportation all maximize efforts to measure passengers' body temperature with infrared thermographer and to ensure every passenger wears a mask to prevent transmission of the COVID-19.

KOREA: Hana Tour and Mode Tour, the nation's top 2 wholesalers, reported dismal year on year declines of 99% to 2,690 pax and 1,000 pax respectively in their booking sales in terms of package products in March. South Korea now has 9,976 confirmed cases, up by 89 cases to yesterday. Central Discharge Countermeasure Headquarters confirmed that the imported cases accounted for 35% of 1,383 confirmed cases within 2 weeks from 3/18-3/31. According to Korea Hotel Assoc., 44 major hotels across the country are estimated to have incurred losses of US\$67.5 billion from 110,000 cancellations of rooms as of 3/11 since the Lunar New Year holiday in January.

Department of Health Update

COVID-19 Positive* Cases Cumulative totals as of 12:00pm on April 2, 2020

County	285 (27)
Hawaii	18 (0)
Honolulu	206 (24)
Kauai	12 (0)
Maui	27 (1)
Pending	20 (2)
HI Residents Diagnosed Outside of HI	2 (0)
Total Required Hospitalization	15 (2)
Total Deaths	1 (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 & Cruise lines

BRITISH AIRWAYS: is expected to furlough 36,000 staff members by early April.

KOREAN AIR: is only operating to 15 destinations including: New York City, Paris, London, HO Chi Minh City, Narita and Shenyang.

HAWAIIAN AIR: is providing medical professionals with complimentary Neighbor Island flights during April in an effort to support the fight against COVID-19 in communities throughout the state. These initiatives are a result of partnering with the local health care organizations including Hawaii Emergency Physicians Associated, The Queen's Health Systems, Kaiser Permanente Hawaii, Hawaii Permanente Medical Group, Hawaii Pacific Health and Diagnostic Laboratory Services Inc.

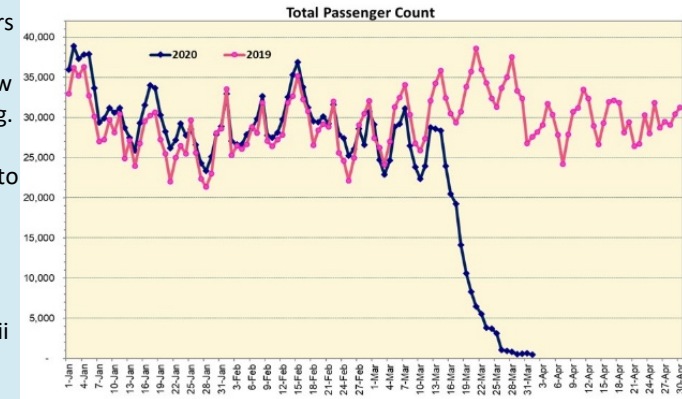
CRUISE LINES: Carnival Cruise Line has announced further cancellations. These new cancellations will effect Hawaii. The Carnival Miracle was scheduled to visit the Hawaiian Islands in September & October. The embarkation port was San Francisco. All sailings from San Francisco have been cancelled for the remainder of 2020. Holland America continues to await a decision if it can disembark the Zaandam and Rotterdam guests in Florida. President Trump says he will step in, but no official announcement has been made as of yet. The Coast Guard is warning vessels off the shores of South Florida, that they will not evacuate anyone ill.

Impact on Hotels

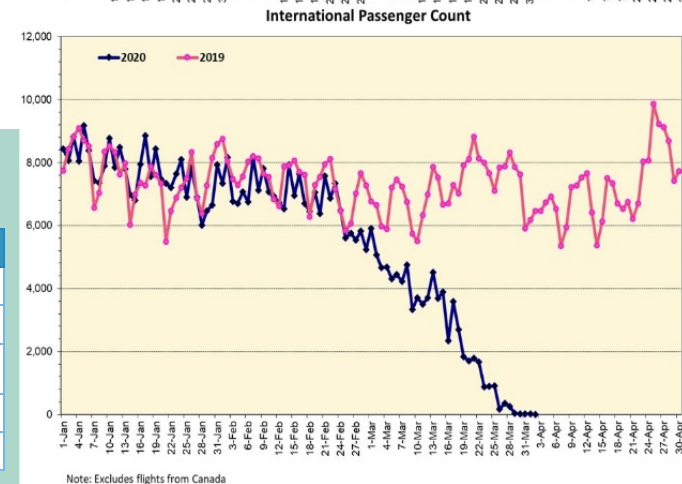
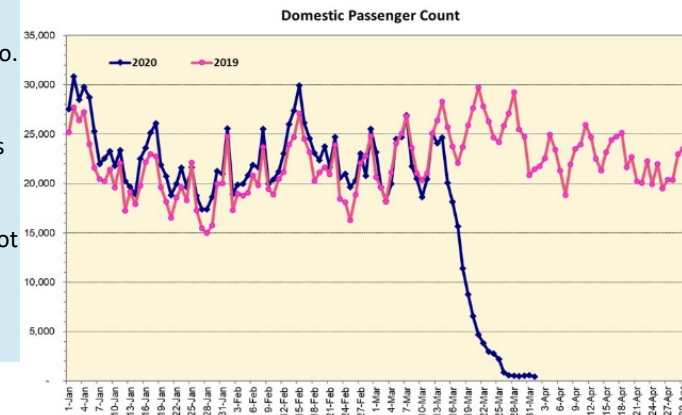
No change in hotel status. The open hotels are participating in the Hotels for Heros program.

Daily Passenger Count Table

04/01/2020	Domestic	International	Total
Oahu	377	17	394
Maui	23		23
Island of Hawaii	31		31
Kauai	17		17
State	448	17	465



Note: Excludes flights from Canada

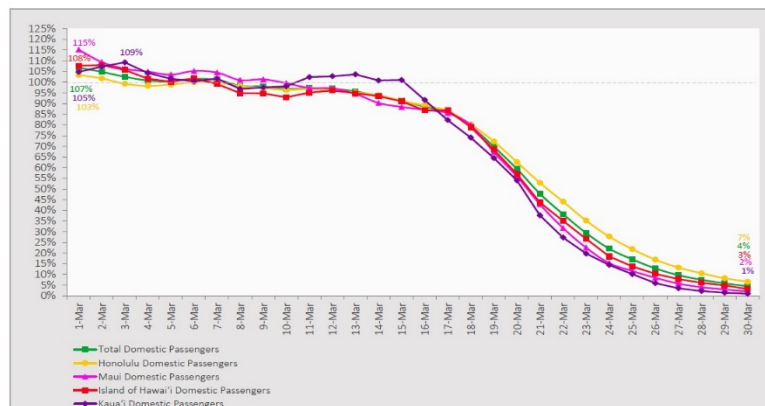


Note: Excludes flights from Canada

7-Day Domestic by Island Moving Average Daily Passenger Volume

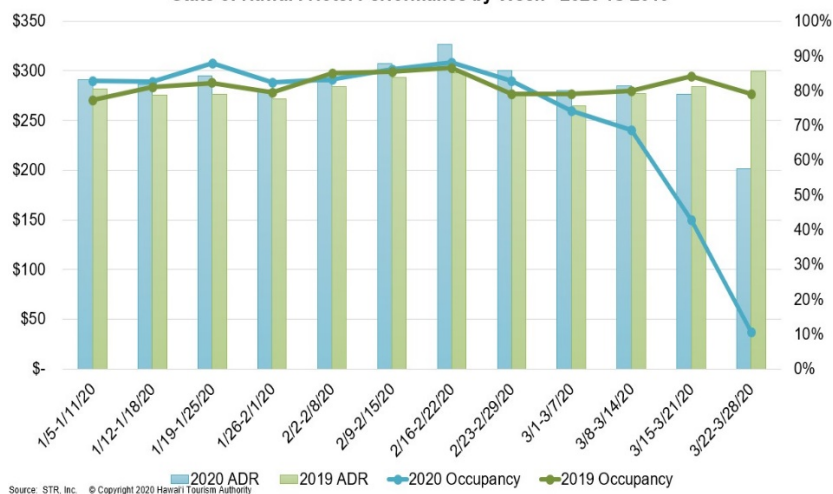
2020 Volume as Percentage of 2019 Volume

Through March 30, 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 22-28, 2020

	Occupancy	ADR	RevPAR
State of Hawaii	10.5%	\$ 201.36	\$ 21.20
Oahu	10.5%	\$ 175.77	\$ 18.45
Maui County	10.2%	\$ 251.75	\$ 25.59
Kauai County	9.4%	\$ 220.67	\$ 20.67
Island of Hawaii	12.2%	\$ 214.80	\$ 26.11

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

2020 Volume versus 2019 Volume

Through March 30, 2020

March 2020 (Month-to-Date through March 30)

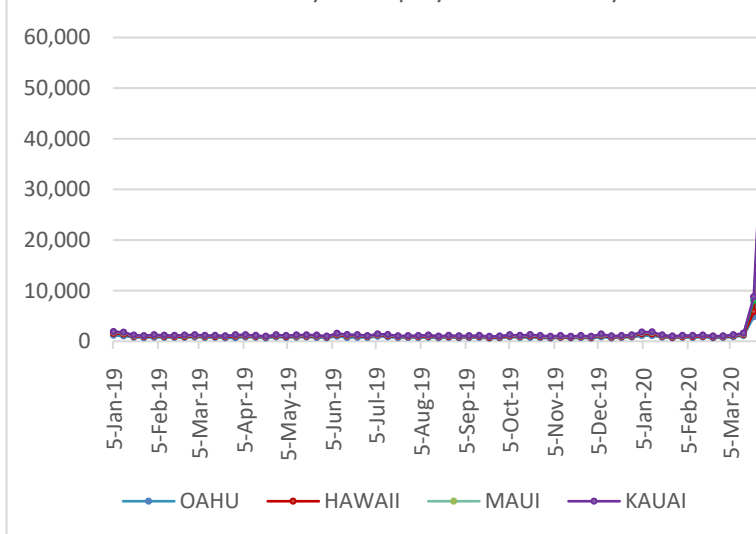
	2020	2019	Volume Change	Percent Change
Honolulu	226,897	386,777	-159,880	-41.3%
Maui County	99,560	185,059	-85,499	-46.2%
Island of Hawai'i	50,505	93,577	-43,072	-46.0%
Kaua'i	35,373	67,044	-31,671	-47.2%
Total	412,335	732,457	-320,122	-43.7%

2020 (Year-to-Date through March 30)

	2020	2019	Volume Change	Percent Change
Honolulu	963,891	1,057,328	-93,437	-8.8%
Maui County	440,725	481,680	-40,955	-8.5%
Island of Hawai'i	216,036	246,174	-30,138	-12.2%
Kaua'i	148,581	174,931	-26,350	-15.1%
Total	1,769,233	1,960,113	-190,880	-9.7%

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 28, 2020

State of Hawaii	48,639
C&C of Oahu	27,020
Maui County	10,933
Hawaii County	6,467
Kauai County	4,037
Agent (fled in Hawaii against another state)	182

News Highlights

April 2, 2020

Hawaii News Now: [Hawaii reports 34 new coronavirus cases, bringing statewide total to 258](#)

Hawaii News Now: [Residents worry quarantine rules aren't being followed by some travelers](#)

Honolulu Star-Advertiser: [Three Hawaii mayors ask Trump to stop all non-essential travel](#)

KHON2: [Neighbor islands may implement even stricter rules if stay-at-home orders are ignored](#)

KHON2: ['Hotels for Heroes' safe stay for essential personnel](#)

Honolulu Star-Advertiser: [Interisland quarantine order empties Hawaii airports](#)

Hawaii Public Radio: [The Conversation: Hospitality Industry Weathers The COVID-19 Crisis](#)

The Garden Island: [Kauai COVID-19 Q&A](#)

Travel Weekly: [Consumer travel publications change strategies during virus crisis](#)

Skift: [How Will Event Planners React To The Coronavirus Crisis?](#)

Helpful Resources

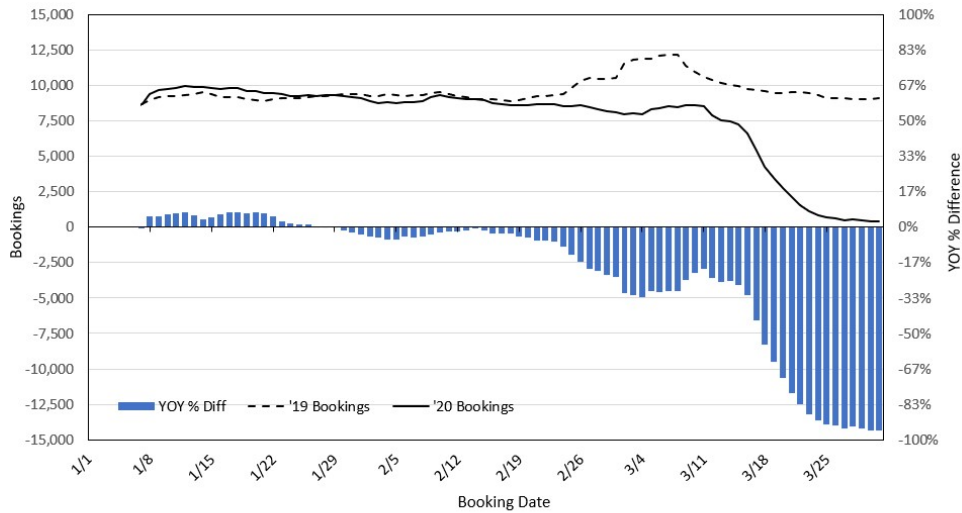
Department of Health
<https://hawaiicovid19.com/>

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/>

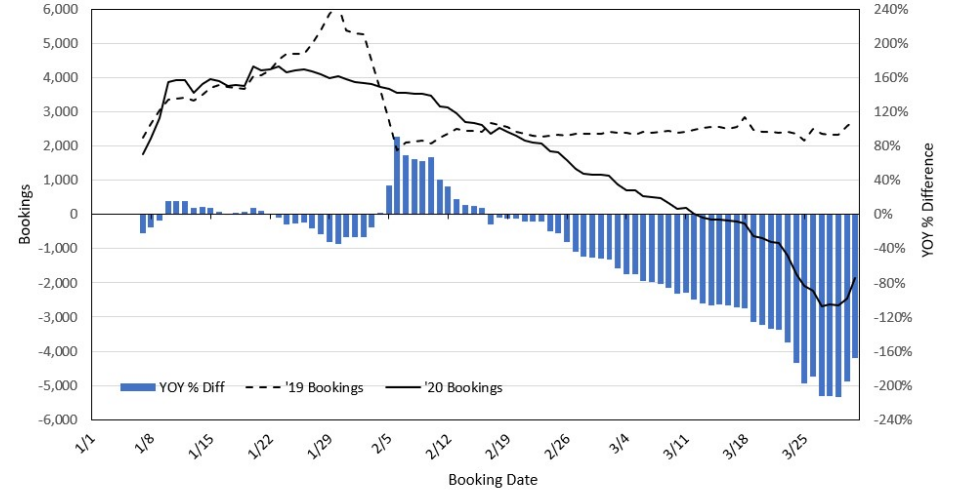
Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 U.S.



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

Update: Mar 31, 2020

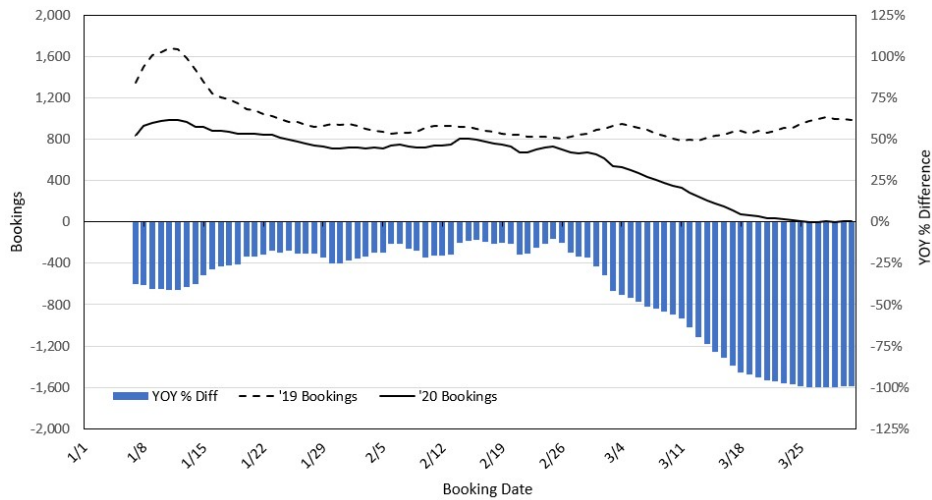
Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 Japan



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

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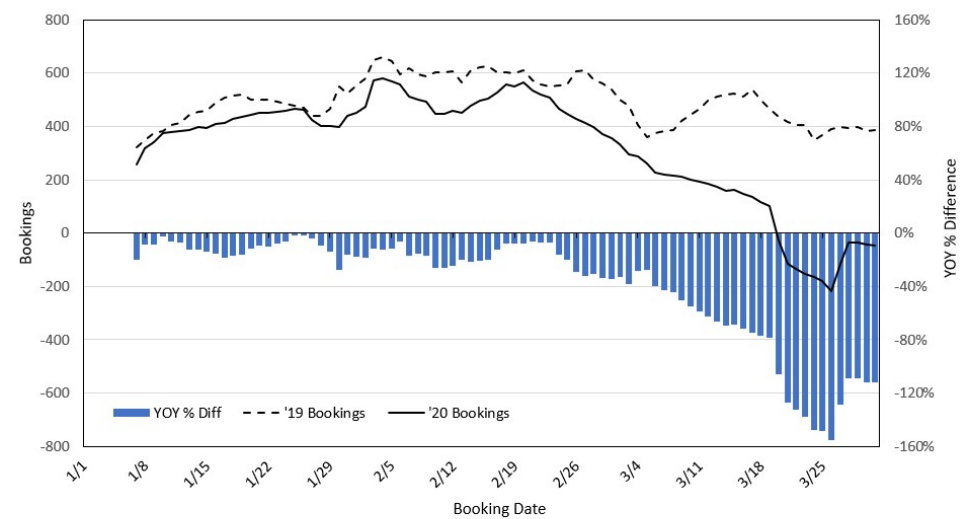
Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 Canada



*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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