

HTA COVID-19 UPDATE

(Issued: 3/31/20 @ 3:00pm)

Impact on Wholesale Partners

JAPAN: The Ministry of Foreign Affairs raised alert levels to level 2 for travels to all countries, calling for all nonessential travels to be cancelled. This is the first time that such an announcement is made globally from potential threats. Infection threat levels were raised to level 3, calling for all travels to be cancelled for Ireland, Sweden and Portugal. Infection threat levels were raised to level 2, calling for all non-essential travels to be cancelled for the 6 Southeast Asian countries of Indonesia, Thailand, Philippines, Brunei, Vietnam and Malaysia. All travelers arriving from the United States will be required to undergo a 14-day self-quarantine.

CHINA: Total confirmed cases: 82,547 (48 new cases compared to yesterday). All 48 new cases were imported. The Epidemic covers total of 337 cities in Greater China, among 310 cities have zero increase.

OCEANIA: Following the total international travel ban imposed on 3/25, the following measures have been added in Australia: All international arrivals (citizens and residents) are being taken to hotels for a mandatory 14-day isolation (at govt expense). All gatherings of more than 2 people are now banned (except families). Stay at home unless for basic needs, medical appts, or if you have to travel for work. The Australian government has launched a COVID-19 app with information, advise, symptom checker and to register isolation. As of 3/30 there are 4,093 cases in Australia. Starting 4/1 Flight Center will stand down 3,800 staff until further notice.

US: Destination Analysts reported key findings of Americans and travel: 2/3 agree they "can't wait to get out and travel again". Nearly 1/3 say they will change the types of destinations they choose to visit after the Coronavirus situation is resolved; another 26% are unsure if they will. In the interim, 55.4% of American travelers have been taking action to support local businesses where they live.

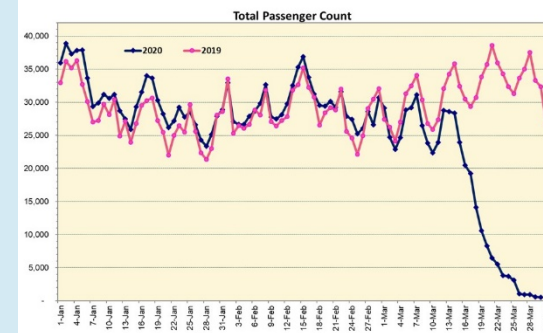
UK: TUI Holidays will be furloughing 11,000 staff, including 4,000 retail agents. A further 393 people have died with COVID-19 yesterday, the highest daily total so far. A total of 1,801 people have died across the UK. The UK media are focusing on online and virtual travel, bringing destinations into people's living rooms.

MALAYSIA: All supermarkets and eateries will be open from 8am to 8pm.

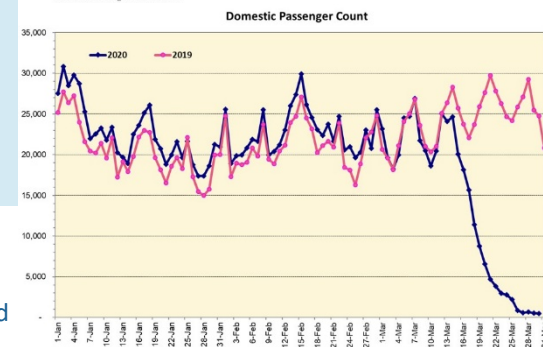
SINGAPORE: The government has issued the 2nd round of stimulus (\$48 billion) to aid the economy through the pandemic.

Impact on Airlines

US: Alaska Airlines, Delta Airlines, American Airlines, Southwest, Hawaiian and United all have flights still arriving from the mainland, departing from Seattle, Los Angeles, Oakland, San Francisco, Denver, Chicago and Houston.

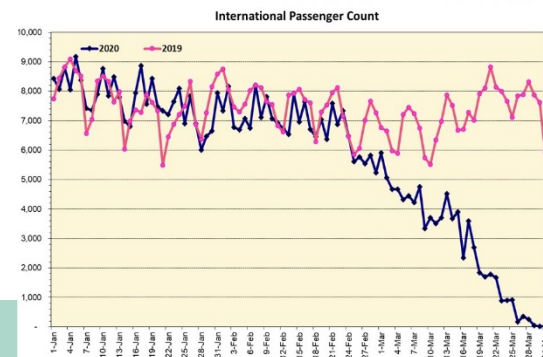


Note: Excludes flights from Canada



Impact on Hotels

As of now, we have 110 hotels closed across Hawaii. This number is fluid and changes frequently.



Note: Excludes flights from Canada

Department of Health Update

COVID-19 Positive* Cases Cumulative totals as of 12:00pm on March 31, 2020

County	224 (20)
Hawaii	15 (0)
Honolulu	157 (18)
Kauai	12 (0)
Maui	25 (0)
Pending	13 (2)
HI Residents Diagnosed Outside of HI	2 (0)
Total Required Hospitalization	13 (1)
Total 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.

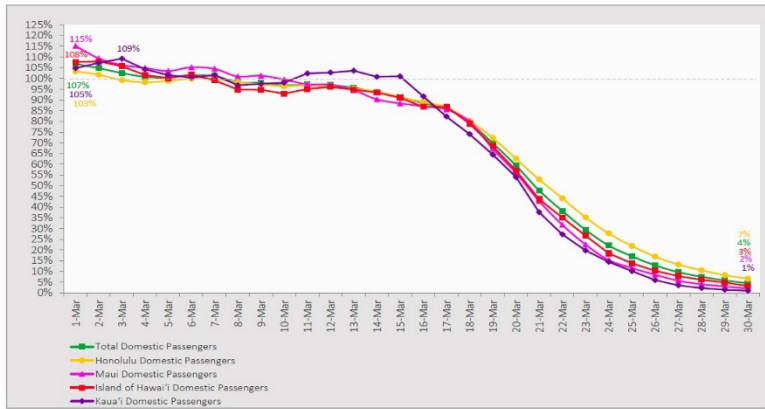
Daily Passenger Count Table

3/30/2020	Domestic	International	Total
Oahu	394	17	411
Maui	48		48
Island of Hawaii	30		30
Kauai	5		5
State	477	17	494

7-Day Domestic by Island Moving Average Daily Passenger Volume

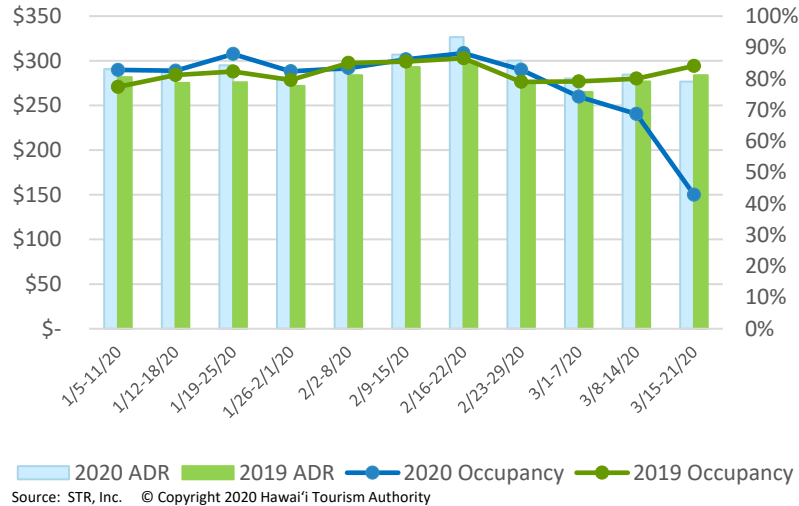
2020 Volume as Percentage of 2019 Volume

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 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://hawaiiocovid19.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 30, 2020

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

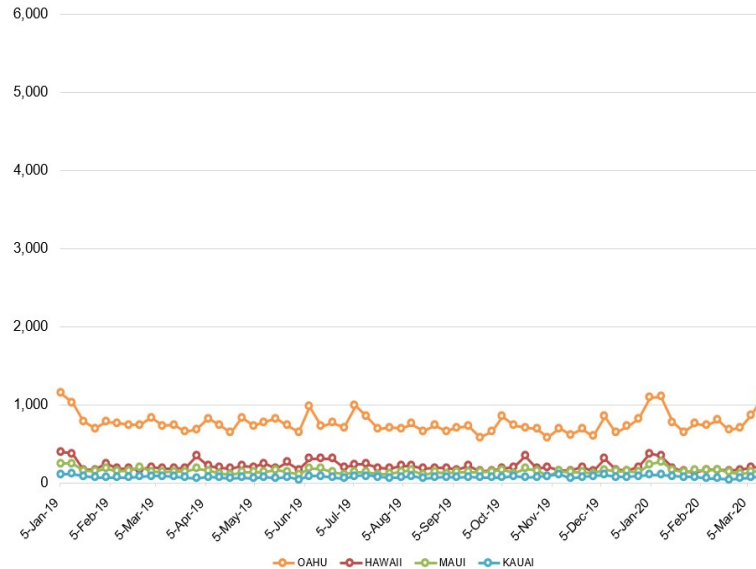
	2020	2019	Volume Change	Percent Change
Honolulu	226,897	386,777	-159,880	-41.3%
Maui County	99,560	185,059	-85,499	-46.2%
Island of Hawai'i	50,505	93,577	-43,072	-46.0%
Kaua'i	35,373	67,044	-31,671	-47.2%
Total	412,335	732,457	-320,122	-43.7%

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 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

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

News Highlights

March 31, 2020

Hawaii Public Radio: [Hawaii Update: Interisland Travelers Ordered To Quarantine; Case Total Now At 204](#)

Hawaii News Now: [Visitor arrivals to Hawaii slow to a trickle under mandatory quarantine order](#)

Hawaii Magazine: [How to Experience Pearl Harbor at Home](#)

Hawaii News Now: [Researchers need your help tracking the movement of coronavirus in Hawaii](#)

The Garden Island: [Take-out currently best option](#)

West Hawaii Today: [Economist: Hawaii in recession as virus shuts down tourism](#)

Honolulu Civil Beat: [Report: Hawaii's Economic Downturn Will Be 'Sharp And Painful'](#)

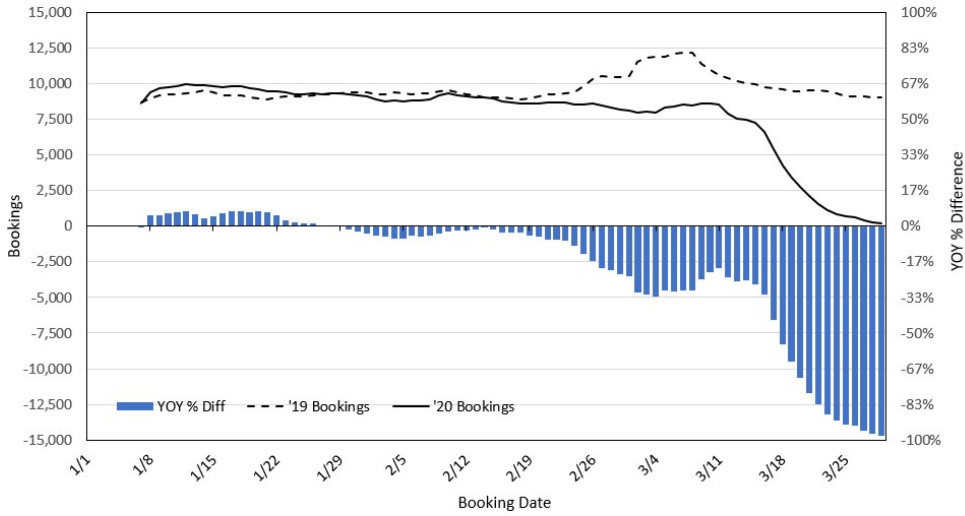
Forbes: [Here Are The Deadliest \(And Least Deadly\) Coronavirus States](#)

U.S. News & World Reports: [Hawaii Governor Orders Quarantine for Travel Between Islands](#)

CNN: [Here are the states restricting travel from within the US](#)

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

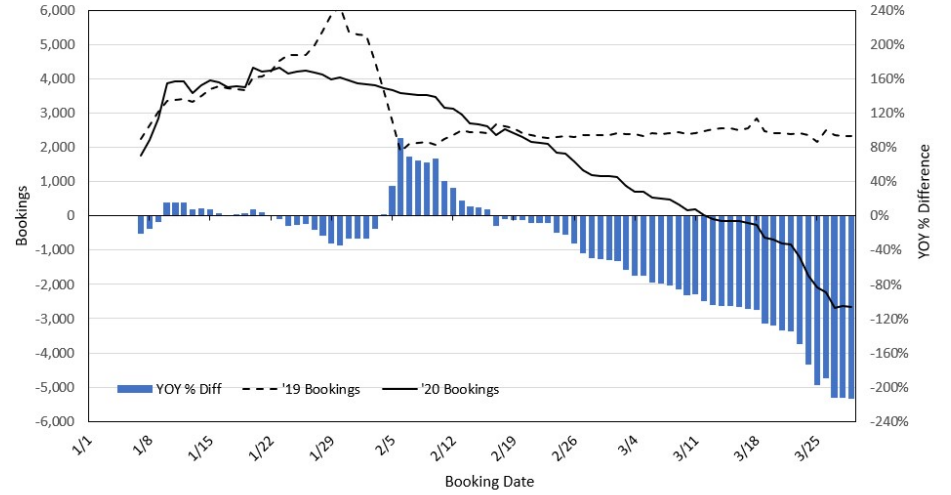
Travel Agency Bookings to Hawaii for Future Arrivals*
Based on a 7-day Moving Average, 2020 vs 2019
U.S.



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

Update: Mar 29, 2020

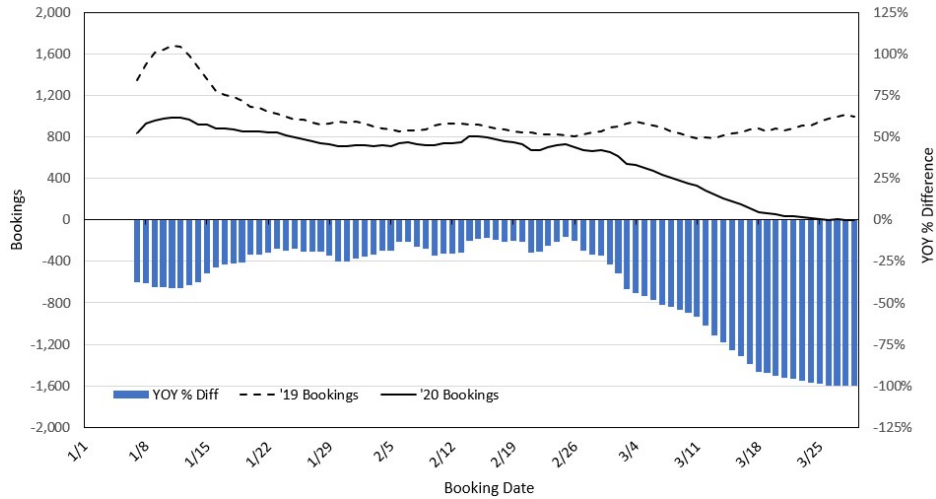
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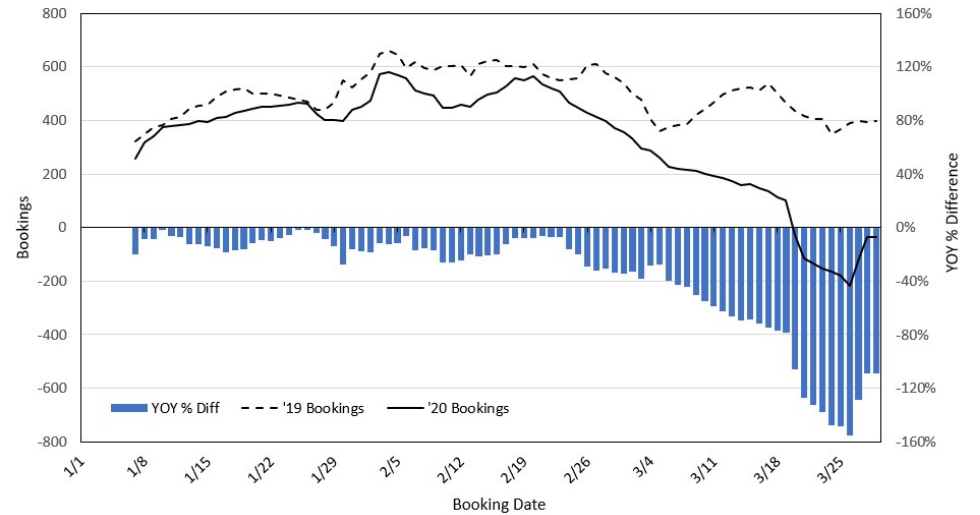
Travel Agency Bookings to Hawaii for Future Arrivals*
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Canada



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