

HTA COVID-19 UPDATE

(Issued: 3/23/20 @ 6:00pm)

Impact on Wholesale Partners

US: John Hopkins reports 19,285 confirmed cases (+5,607 in 1 day). For the week ending 3/9, domestic search for travel within U.S was down 11%, bookings is down by 17%. 7-day moving average at 69% of STLY.

CANADA: The Canadian Olympic Committee has decided not to send athletes to the 2020 Tokyo Olympics. Costco Travel Canada is not allowing any new bookings to Hawaii until 5/1.

JAPAN: With the hotel occupancy in Japan continues to go down. Staff layoff and travel agencies closures are starting.

COVID-19 continues to spread with over 860 recorded cases.

THAILAND: Starting 3/22, any foreigners and Thai nationals that is coming/returning into Thailand are required to produce a valid Health Certificate with a negative COVID-19 lab result issued within 72 hours of flight departures.

SINGAPORE: All short-term visitors will be barred from entering starting 3/23.

NEW ZEALAND: Raised status to Level 2 which is focused on containment (there are 66 cases all travel related). Thus the pressure to move this up to level 3 and take the country closer to a shutdown status.

AUSTRALIA: The Australian Federal Government has imposed closures on all non-essential services as of today. These include indoor entertainment (bars, cafes etc.), sporting and religious venues. SA, WA, NT & Tas have closed their borders and require anyone who enters to self-quarantine for 14 days. Schools are remaining open, however it is advised to parents to keep their children home.

CHINA: Total confirmed cases: 81,602 (39 more new cases). China's Ministry of Cultural Tourism stated that the industry of digital tourism is booming. Over 5 billion views via "cloud entertainment" "cloud live webinar" and "cloud exhibition" during the 2020 Spring Festival.

Department of Health Update

COVID-19 Positive* Cases Cumulative totals as of 12:00pm on March 23, 2020

| Total (new) | 77 (21) |
|---------------------------|---------|
| County of Hawaii | 5 (2) |
| City & County of Honolulu | 53 (12) |
| County Kauai | 3 (0) |
| County of Maui | 11 (2) |
| Pending | 5 (5) |
| Required Hospitalization | 4 (1) |
| Deaths | 0 |

* Includes presumptive and confirmed cases, and Hawaii and non-Hawaii residents; note that CDC provides case counts according to states of residence.

Impact on Airlines

HAWAIIAN AIRLINES: Will suspend most international flights into Hawaii effective Thursday 3/26. Contacting passengers to give them this message and having them re-book flights.

DELTA: Is cutting systemwide capacity by 70%.

BANGKOK Airways and AirAsia Thai has suspended all of their international flights while Thai Lion Air has grounded its fleet entirely.

KOREAN AIR: Is shutting down the operation to Europe and the Middle East, operations to U.S are continuing although decreased. Current schedule to North America as follows:

1 daily operation to LA, NY, Honolulu via Tokyo Narita. 4 weekly operations to Atlanta, San Francisco, 3 weekly operations to Chicago O'Hare, Honolulu, Washington Dulles.

ASIANA AIRLINES: Starting next week is resuming Seoul to Hong Kong route with 2 weekly flights to start. This interim schedule is currently listed until 4/24.

AIR BUSAN: Due to increased domestic travel demand, Air Busan has temporarily increased its service to Juju Island from Seoul and Busan with a total increased 16,280 seats in March.

JAPAN AIRLINES: Cancellations:

- JL780/781 NRT-HNL-NRT → NON-OPERATING: MAR25-28.
- JL792/791 KIX-HNL-KIX → NON-OPERATING: MAR25-28.
- JL794/793 NGO-HNL-NGO → NON-OPERATING: MAR25-28.
- JL770/779 NRT-KOA-NRT → NON-OPERATING: MAR25-28.

There will be only 1 arrival and 1 departure flight during this period.

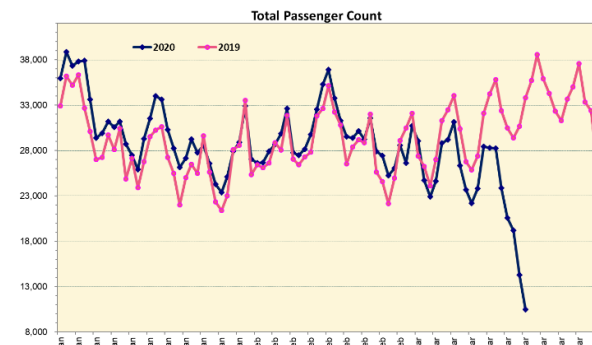
- MAR 25-27 JL782/JL789 NRT-HNL-NRT → Change to larger aircraft
- MAR28 JL782/JL071 NRT-HNL-HND → Change to larger aircraft

Impact on Hotels

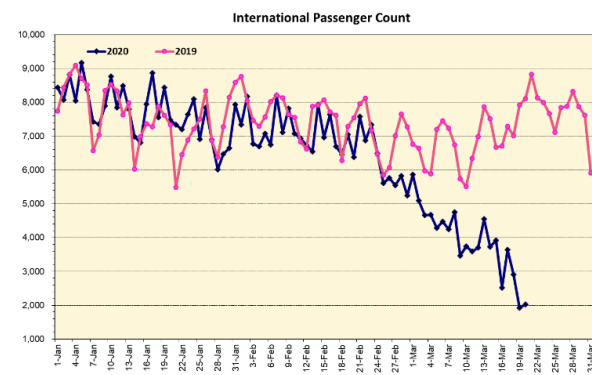
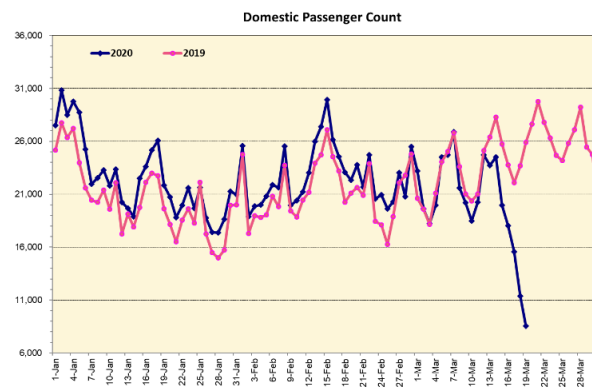
A hotel has reported they will run -60% to STLY, and the -60% is with starting the month much higher than the last year. They have seen most demand evaporate prior to the quarantine announcement but with that and the stay in place orders, expect the occupancy to drop to single digit occupancy. Another hotel reported that they are busy closing the hotel with 0% occupancy coming soon. Several other hotels will soon run single digit 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 |

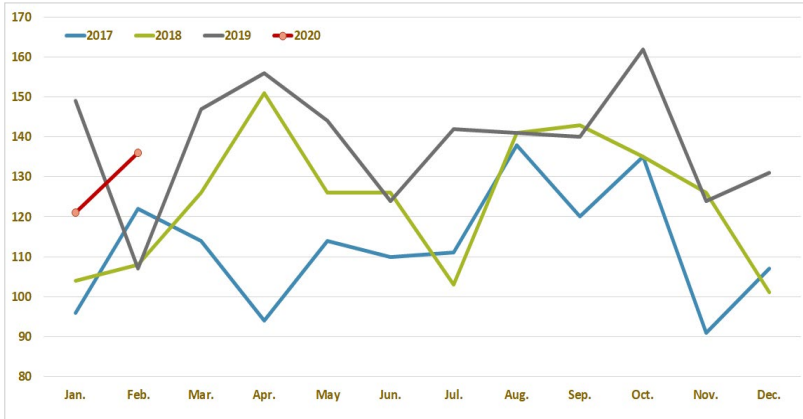


Note: Excludes flights from Canada

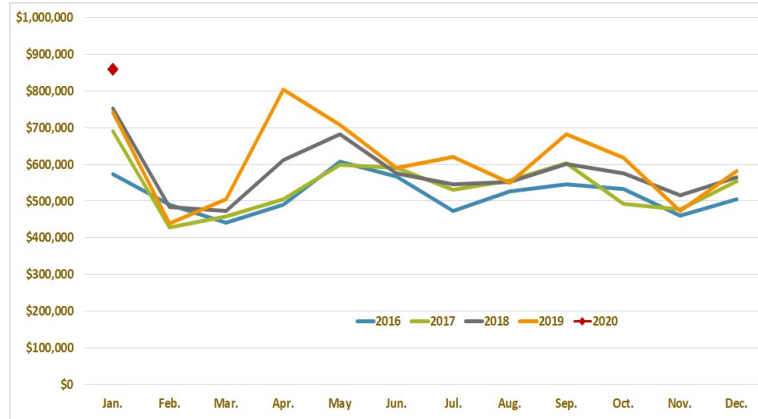


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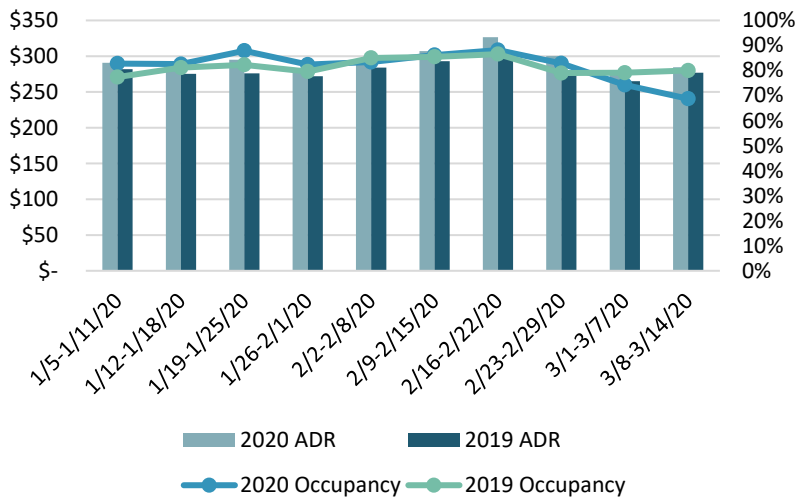
Bankruptcy Filings All Chapters 2017 to 2020



General Fund Tax Revenue 2016 to 2020



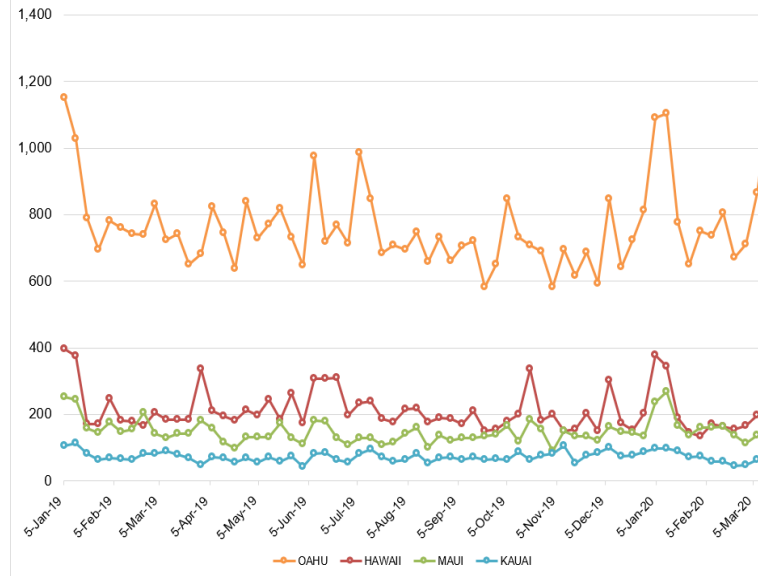
State of Hawai'i Hotel Performance by Week 2020 vs 2019



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 |

2020 Initial Weekly Unemployment Claims by Island



Weekly Unemployment Initial Claims: March 14, 2020

| | |
|---|-------|
| State of Hawaii | 1,595 |
| City and County of Honolulu | 1,108 |
| Maui County | 166 |
| Hawaii County | 217 |
| Kauai County | 84 |
| Agent (filed in Hawaii against another state) | 18 |

News Highlights

March 23, 2020

Hawaii News Now: [Stay-at-home order for Oahu set to begin in 'extraordinary' push to stop spread of virus](#)

Honolulu Star-Advertiser: [Hawaiian Airlines to cease most flights](#)

Honolulu Star-Advertiser: [Editorial: Difficulties deepen as tourism-dependent Hawaii forced to tell visitors to stay out due to coronavirus](#)

The Garden Island: [Making the new normal](#)

The Guardian: [Coronavirus in paradise: Hawaii clamps down with curfews and quarantine](#)

Big Island Now: [Local Hotels Temporarily Shut Down to Help Slow COVID-19 Crisis](#)

Travel Weekly: [Covid-19 closures, cancellations hit Hawaii](#)

West Hawaii Today: [Mayor: All Hawaii County beach parks to close Saturday](#)

The New York Times: [As Visitors Continue to Arrive, Tourist Areas Say: Stay Home](#)

ABC News: [Hawaii to quarantine all arrivals to the state for 14 days](#)

Forbes: [Hawaii Travel Update: New Closures, Restrictions For COVID-19](#)

Helpful Resources

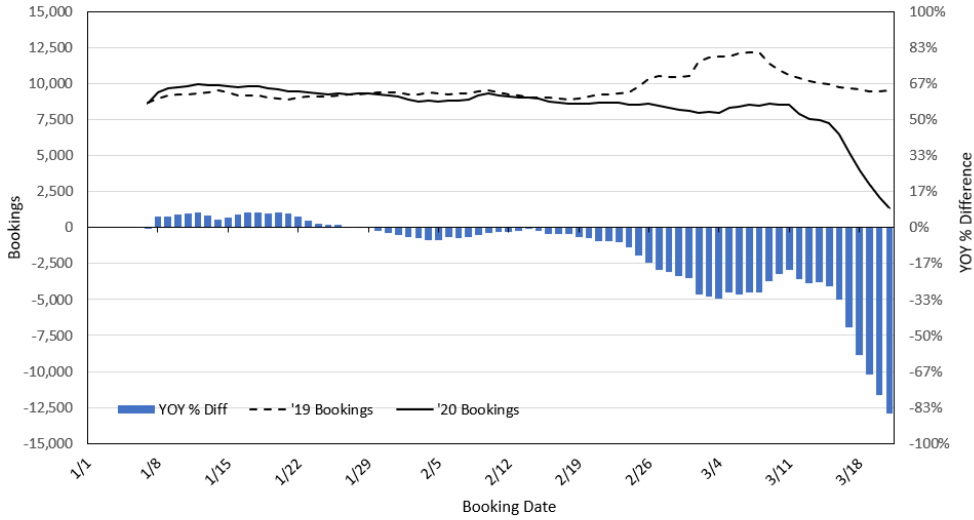
Department of Health
<https://hawaicovid19.com/>

Department of Health
<https://health.hawaii.gov/docd/advisories/nov-el-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 21, 2020

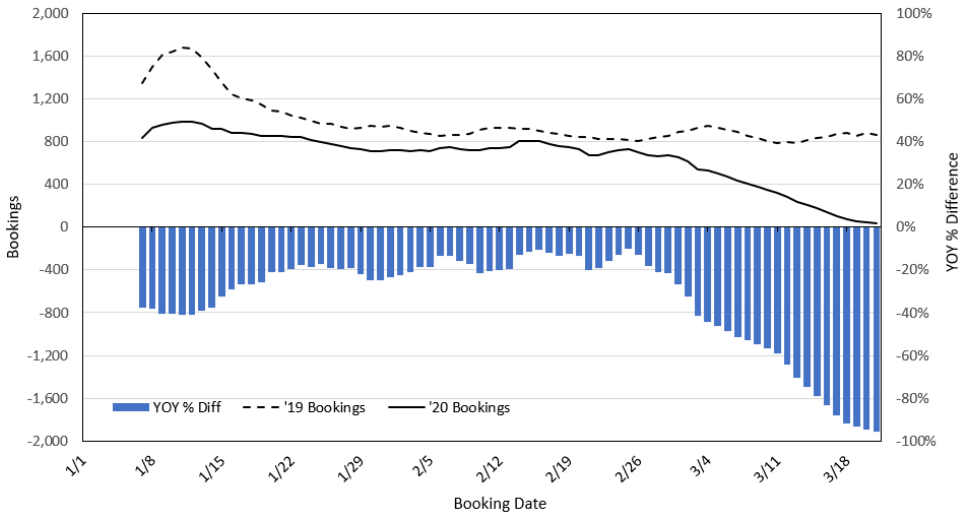
Travel Agency Bookings to Hawaii for Future Arrivals*
Based on a 7-day Moving Average, 2020 vs 2019
Japan



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 Source: Global Agency Pro

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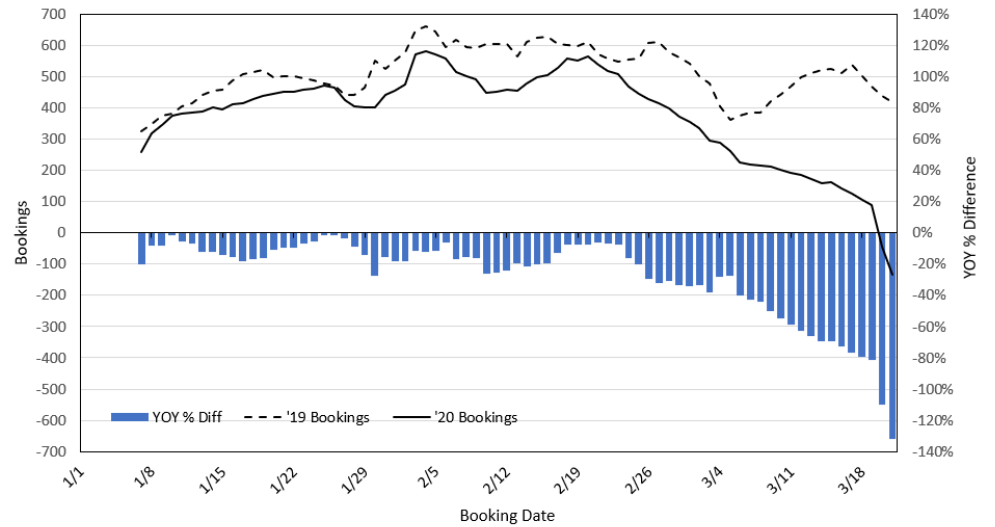
Travel Agency Bookings to Hawaii for Future Arrivals*
Based on a 7-day Moving Average, 2020 vs 2019
Canada



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



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