



***HĀLĀWAI PAPA ALAKA'I KŪMAU
KE'ENA KULEANA HO'OKIPA O HAWAI'I***

**REGULAR BOARD MEETING
HAWAI'I TOURISM AUTHORITY**

Po'ahā, 28 Mei, 2020, 9:30 a.m.
Thursday, May 28, 2020 at 9:30 a.m.

Hālāwai Kikoho'e
VIRTUAL MEETING

Ma loko o kēia wā kūlanalana o ka ma'i COVID-19, 'o ka ho'opakele i ke ola a me ka nohona o ke kaiāulu ka makakoho nui. Hiki i ka lehulehu ke nānā mai i kēia hālāwai ma o ka 'ao'ao Pukealo a ke Ke'ena Kuleana Ho'okipa O Hawaii'i.

In light of the evolving COVID-19 situation, protecting the health and welfare of the community is of utmost concern. This public meeting may be monitored remotely and will be streamed via the Hawaii'i Tourism Authority's Facebook Page.

<https://www.facebook.com/HawaiiHTA/>

Papa Kumumana'o
AGENDA

1. *Ho'omaka A Pule*
Call to Order and Pule
2. *'Āpono I Ka Mo'o'ōlelo Hālāwai*
Approval of Minutes of the February 27, 2020 Board Meeting
3. *Hō'ike Lālā*
Report of Permitted Interactions at an Informational Meeting or Presentation Not Organized by the Board Under HRS section 92-2.5(c)
4. *Hō'ike A Ka Luna Ho'okele*
Report of the CEO Relating to Staff's Implementation of HTA's Programs During February – April 2020:
 - Major Market Management including Destination Marketing Management Services, Global Meetings, Conventions and Incentives (MCI) Program Management Services, Responsible Tourism, Support of State COVID-19 Mitigation Efforts



5. *Hō'ike 'Ikepili Noi'i 'Oihana Ho'omāka'ika'i*
Presentation and Discussion of Current Market Insights and Conditions in Hawai'i and Key Major Hawai'i Tourism Markets, Including the United States, Japan, Canada, Oceania, Other Asia, Europe, and Cruise
6. *Hō'ike, Kūkākūkā A Ho'oholo No Nā Mo'okālā*
Presentation, Discussion and Action on HTA's Financial Reports for February, March, April 2020
7. *Nā'ana I Ke Noi Mo'ohelu HTA Makahiki Kālā 2021*
Review of the Proposed Budget for the Hawai'i Tourism Authority for Fiscal Year 2021
8. *Hō'ike No Ke Kau 'Aha'ōlelo 2020*
Update Relating to the 2020 Legislative Session and Related Bills Relevant to HTA
9. *'Āpono I Ka 'Ōlelo Ho'oholo 2020-1-3*
In Accordance with Hawai'i Revised Statutes (HRS) Section 201B-9 and 201B-10, the Hawai'i Tourism Authority Board Shall Discuss and Take Action on *Resolution 2020-1-3 Regarding the Visitor Industry, COVID-19* and that the Board has Determined that the Occurrence of an Outbreak of Disease is Adversely Affecting Hawai'i's Tourism Industry by Resulting in Substantial Interruption in the Commerce of the State and Adversely Affecting the Welfare of its People. The Resolution Shall Include a Request to the State of Hawai'i Governor David Y. Ige to Declare that a Tourism Emergency Exists
10. *'Āpono I Ka 'Ōlelo Ho'oholo 2020-1-4*
In Accordance with the Hawai'i Tourism Authority's Operating Budget Policy, Policy #400-50, the Board Shall Discuss and Take Action on *Resolution 2020-1-4 that Temporarily Suspends Section 6 and Section 7 of the Aforementioned Policy for a Period of 90 days from the Date of the Approval of the Resolution by the Board*. Policy #400-50, Section 6 states "Once the Operating Budget is Approved by the Board, the Reallocation of Funds Between Main Budget Categories of \$250,000 or More Shall Require Board Approval Prior to Reallocation. All Reallocations Between Main Budget Categories, Regardless of Dollar Amount, Shall be Reported to the Board at the Board Meeting Following the Reallocation." Policy #400-50, Section 7 States "Reallocations of \$250,000 or More Shall be Considered Budget Amendments and Shall be Presented to the Board in the Form of a Resolution Which Shall Clearly State the Following: a. Original Budget Category and Subcategories With Original Funding Amount; b. Proposed Budget Category to Receive Funding and New Funding Amount for that Category; c. Revised Original Budget Category Funding Amount (post-transfer); d. Purpose and Explanation for the Amendment Request; and, e. Impact to the Original Budget Category Due to the Reduction, if Any." The President & CEO Shall Report, on a Monthly Basis, any Reallocations that Have Been Completed During the 90-Day Period. This Resolution Which Authorizes the Suspension of These Sections is Necessary to Expedite the Reallocation of Funds to Address the Existing Situation Pertaining to COVID-19 and is in Alignment with Governor David Y. Ige's Emergency Proclamation Dated March 4, 2020.



11. *Hō'ike A Ke Kōmike Hokona Kūmau No Ke Kūkākūkā A Ho'oholo*
Report of the Marketing Standing Committee with the Committee's Recommendations to Support Various Marketing Proposals, for Discussion and Action by the Board

12. *Ho'oku'u*
Adjournment

*** *Aha Ho'okō: Ua hiki i ka Papa Alaka'i ke mālama i kekahi hālāwai kūhelu i kū i ka Hawai'i Revised Statutes (HRS) § 92-4. E mālama 'ia kēia hālāwai kūhelu nei ma lalo o ka § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) no ka pono o ko ka Papa Alaka'i kūkā a ho'oholo 'ana i nā nīnūnē a nīnau i pili i ko ka Papa Alaka'i kuleana me ko ka Papa Alaka'i loio. He hālāwai kūhelu kēia i 'ole paulele 'ia ka 'ikepili a i mea ho'i e mālama kūpono ai ko Hawai'i 'ano, he wahi i kipa mau 'ia e nā malihini.*

***Executive Session: The Board may conduct an executive session closed to the public pursuant to Hawai'i Revised Statutes (HRS) § 92-4. The executive session will be conducted pursuant to § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) for the purpose of consulting with the board's attorney on questions and issues pertaining to the board's powers, duties, privileges, immunities, and liabilities; and to discuss information that must be kept confidential to protect Hawai'i's competitive advantage as a visitor destination.

Kono 'ia ka lehulehu e nānā mai i ka hālāwai a ho'ouana mai i ka 'ōlelo hō'ike kākau 'ia no kēlā me kēia kumuhana i helu 'ia ma ka papa kumumana'o. Hiki ke ho'ouana mai i nā 'ōlelo hō'ike kākau 'ia ma mua o ka hālāwai iā carole@gohta.net. Inā pono ke kōkua ma muli o kekahi kīnānā, e ho'omaopopo aku iā Carole Hagihara (973-2289 a i 'ole carole@gohta.net), he 'ekolu lā ma mua o ka hālāwai ka lohi loa.

Members of the public are invited to monitor the public meeting and provide written testimony on any agenda item. Written testimony shall be submitted prior to the meeting by email to carole@gohta.net. Any person requiring an auxiliary aid/service or other accommodation due to a disability, please contact Carole Hagihara (973-2289 a i 'ole carole@gohta.net) no later than 3 days prior to the meeting so arrangements can be made.

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Approval of Minutes of the
February 27, 2020 Board Meeting



**REGULAR BOARD MEETING
HAWAII TOURISM AUTHORITY
Thursday, February 27, 2020
Hawaii'i Convention Center
1801 Kalākaua Avenue, Honolulu, Hawaii'i 96815**

MINUTES OF REGULAR BOARD MEETING

MEMBERS PRESENT:

Rick Fried (Chair), George Kam, Kyoko Kimura, Fred Atkins, Ku'uipo Kumukahi, Sherry Menor-McNamara, Benjamin Rafter, Kelly Sanders, and Kimi Yuen

MEMBERS NOT PRESENT:

Micah Alameda, David Arakawa, and Daniel Chun

HTA STAFF PRESENT:

Chris Tatum, Keith Regan, Pattie Herman, Marc Togashi, Kalani Ka'anā'anā, Marisa Yamane, Jadie Goo, Jennifer Chun, Caroline Anderson, Carole Hagihara, Chris Sadayasu, Chael Kekona, Isabella Dance, Joseph Patoskie, Laci Goshi, Lawrence Liu, Maile Carvalho, Cynthia Morita, Maka Casson-Fisher, Minh Chau Chun, and Ronald Rodriguez

GUESTS:

Senator Glenn Wakai, Alexander Wong, Malia Sanders, Nathan Kam, Erin Khan, Pua Sterling, Jessica Lani Rich, Kenlyn Lum Yee, Barbara Okamoto, Christine Ulandez, Branden Askew, Jason Paloma, Dennis Suo, Eric Takahata, Mitsue Varley, Philip Richardson, Alex Wong, Ka'iulani Laehā, Kahoku Lindsey Asing, Allison Schaefer, Chris Kam, Alan Ellis, Teri Orton, Mari Tait, and Noelle Liew

LEGAL COUNSEL:

Gregg Kinkley

1. Call to Order and Pule

Chair Rick Fried called the meeting to order at 9:33 AM. Chair Fried introduced Kalani Ka'anā'anā, who opened the meeting with a pule. Mr. Ka'anā'anā acknowledged that February is Hawaiian language month. Mr. Ka'anā'anā then played an audio clip to honor the voices of Hawai'i's kūpuna mānaleo. He added that the continued revitalization of the Hawaiian language requires bringing the voices of our elders and youth together. Mr. Ka'anā'anā then introduced Ka'iulani Laehā, the Chief Executive Officer of 'Aha Pūnana Leo. Ms. Laehā thanked the Board for its commitment to promoting sustainable cultural values and helping 'Aha Pūnana Leo achieve its mission of ensuring that Hawaiian language lives. She added that language is at the root of culture, and to keep visitor experiences authentic, it is important that 'Ōlelo Hawai'i is readily available and normalized. Ms. Laehā explained the history of the program and that it now offers statewide programs from infant-age to doctoral degrees at the University of Hawai'i at Hilo. Ms. Laehā noted that 'Aha Pūnana Leo has been recognized as indigenous language revitalization leaders. Different indigenous communities have come to visit and learn about 'Aha Pūnana Leo's programs. Ms. Laehā stated that there is still work to be done to normalize 'Ōlelo Hawai'i in daily life, social activities, technology, and career paths. Ms. Laehā then invited students from Pūnana Leo o Mānoa to perform a song.

2. Approval of Minutes of the January 30, 2020 Board Meeting

Chair Fried requested a motion to approve the meeting minutes from the January board meeting. George Kam made motion, which was seconded by Ku'uipo Kumukahi. The motion was unanimously approved.

3. Report of Permitted Interactions at an Informational Meeting or Presentation Not Organized by the Board under H.R.S. §92-2.5(c)

Chair Fried asked the Board whether there were any permitted interactions to report, and there were none.

4. Report of the CEO Relating to Staff's Implementation of HTA's Programs during January 2020

Chair Fried introduced HTA Chief Executive Officer Chris Tatum to present his report. Mr. Tatum first raised the issue of coronavirus stating that HTA participated in an editorial board meeting and press conference with the Star Advertiser and Governor David Ige. HTA has also been communicating with the travel industry and providing information to their global travel partners. He noted that HTA has also served as a resource for the travel industry if they have questions because they have direct communication with the Department of Health (DoH) and administration. Mr. Tatum added that HTA has worked with the DoH to reduce the impact of the virus by providing information about proper personal hygiene and providing hand sanitizer units in public areas. He noted that he and

Mr. Kam just returned from Japan, and there were hand sanitizer stations everywhere from airports to hotels. Mr. Tatum added that he saw tourists and more importantly staff using it. He suggested that Hawai'i needs to do that too. He stated that his biggest concern is the number of groups asking questions about the status of the coronavirus and the possibility of changing dates or cancelling. HTA is monitoring the daily arrival numbers and there will likely be an impact moving forward. Industry partners are making preparations and informing their employees. Mr. Tatum stated that it is a community responsibility, but HTA will play a large role. He added that HTA is passing on the information they receive directly from the DoH.

Fred Atkins asked if the airlines are keeping HTA informed and updated of flight cancellations. Mr. Tatum responded in the affirmative. He added that the biggest determiners of flight cancellations are load factors and resource allocation.

Chair Fried stated that he spoke with Lieutenant Governor Josh Green this morning, and that Lt. Gov. Green has also been providing updates. He added that California Governor Gavin Newsom announced that over 8,000 people in California are being monitored for the coronavirus. Mr. Tatum commended the DoH and noted that they planning for the future and not simply managing these issues day by day.

Mr. Tatum then said that he and Mr. Kam traveled to Japan last week. They spoke with officials at Narita Airport and the U.S. Embassy about pre-clearance. Mr. Tatum invited Mr. Kam to share his impressions of the trip to Japan. Mr. Kam said that the press conference was well-attended, and there was incredible coverage on all the major news channels and in magazines and newspapers. He added that Mr. Tatum gave a great speech about the history of Hawai'i and surfing at the press conference. Mr. Tatum stated that the purpose of the press conference was to promote Hawai'i and its surfing brand as the birthplace of surfing. Professional surfers were on the panel with them. Mr. Kam explained the history of Hawai'i and Japan's 50-year long surfing connection. He also shared stories about Takayuki Wakita and other Japanese professional surfers, and the creed of surfing with aloha when visiting Hawai'i. Mr. Tatum said that they also promoted the Bishop Museum and its new exhibits at the press conference.

Mr. Tatum then stated that the Davis Cup is next weekend. Chair Fried encouraged the Board to attend. He noted that the Davis Cup is unique and that 10 other cities tried to host it. Honolulu will host the Davis Cup for 3 years.

Mr. Tatum then shared that the approved 5-year Strategic Plan has been sent to the Board and will be ready for print soon.

Kyoko Kimura asked when the pre-clearance is expected to be ready. Mr. Tatum responded that the best case scenario is a year or more. The pre-clearance would require a bilateral agreement between the United States and Japan. Mr. Kam added that Gov. Ige was optimistic, but no firm date has been set because there are still details to work through.

5. Presentation by the Visitor Aloha Society of Hawaii (VASH) of their Services to Visitors in Need

Chair Fried introduced Jessica Lani Rich, President and Chief Executive Officer of the Visitor Aloha Society of Hawaii (VASH). Chair Fried noted that VASH does great work and that the Board should continue to provide them funding.

Ms. Rich stated that VASH's goal is to have tourists leave Hawaii with a positive memory of their stay even if they experience a crisis. To qualify for VASH's services, one must have roundtrip tickets, and be here less than 60 days. Ms. Rich thanked the Board and Senator Glenn Wakai. Chair Fried also recognized Sen. Wakai.

Ms. Rich acknowledged the significance of social media in today's travel industry. She added that bad images on social media can have a negative effect on the economy. Ms. Rich identified that there were more high profile incidents in 2019 than in any previous year, including the drunk driving crash in Kaka'ako, a helicopter crash in Kailua, a plane crash in Mokulē'ia, visitors robbed at gunpoint, and drownings. Ms. Rich thanked Teri Orton for hosting the "Hawai'i - We Care" event at the Hawai'i Convention Center.

Ms. Rich then added that VASH was in the New York Times. A 34-year old man died on a flight from Canada to Australia. The plane made an emergency landing in Honolulu. VASH assisted the man's widow and children onboard. VASH also provided assistance to an 11-year old, unaccompanied minor that had been stranded in the Air Canada lounge.

Ms. Rich noted that VASH has received inquiries about the coronavirus and whether it is safe to travel to Hawai'i, and she has referred these inquiries to the DoH.

Ms. Rich described the different types of assistance that VASH offers such as counseling, discounted hotel rooms, ground transportation, etc. She added that in 2019 they helped 1,897 visitors from the mainland, Asia, and other parts of the world. Ms. Rich provided a number of anecdotes about different travelers they have helped.

HTA Chief Administrative Officer Keith Regan stated that each county has its own visitor's assistance program. He noted that HTA allocated \$635,000 of total funding with \$368,000 allocated for Ms. Rich's program. He added that in 2019 these programs helped almost 3,500 visitors across all 4 counties and that visitors never forget the help received during a crisis. He then described the funding as a small investment of \$183 per assisted visitor to protect the tourist industry in Hawai'i.

Chair Fried thanked Ms. Rich for her presentation, adding that the Board members now have a deeper understanding of the services that VASH provides.

6. Presentation on the Resident Sentiment Survey Results

Jennifer Chun introduced Chris Kam, President of OmniTrak Group, to present the results of the Resident Sentiment Survey. Mr. C. Kam explained that the survey measures key resident attitudes toward tourists, positive and negative impacts of the tourist industry, and captures resident issues and concerns with the industry. He identified three general trends: (1) resident sentiment toward the tourist industry has generally weakened; (2) residents are most interested in how the tourist industry can improve their quality of life; and (3) residents want a voice in tourism development, and for the industry to create jobs, shopping, restaurant, and entertainment opportunities. Mr. C. Kam then described the survey's metrics and methodology and some notable trends in key questions as contained in the board packet.

Chair Fried asked if the Airbnb bill improved resident sentiment on O'ahu. Mr. C. Kam responded that vacation rentals had a small impact (1%) on resident sentiment. Mr. Tatum asked when the survey was conducted. Mr. C. Kam replied that it was conducted from September to November 2019. Chair Fried noted that the bill passed in August so hopefully it has a positive effect on resident sentiment in next year's survey.

Ms. Kimura asked if any of the people surveyed were in the visitor industry. Mr. C. Kam responded that the people surveyed are asked if they are in the industry, have ever been in the industry, or has a household member in the industry. However, there is no clear trend how it affects resident sentiment. Ms. Kimura asked what percentage of survey takers were in the travel industry. Ms. Chun responded that they can provide that information.

Benjamin Rafter asked if there is data going back to 2006, 2007, and 2008. Ms. Chun responded that the tracking questions date back to 1988. Mr. Rafter then asked when the market crashed in 2008, how quickly sentiment toward the tourist industry improved. Mr. C. Kam said it was rapid, and there was a greater appreciation for the tourist industry. Now that the economy has improved, people have more concerns about the visitor industry.

Mr. Atkins asked if the survey tracks which part of the island the surveyed resident lives. Mr. C. Kam responded that the survey tracks quotas by sections of each island. Ms. Chun noted they tried to increase the survey sample on Kaua'i to break it up by region, but the sample was not large enough.

Chair Fried announced a break in the meeting at 10:56 AM. The meeting reconvened at 11:07 AM.

7. Presentation and Discussion of Current Market Insights and Conditions in Hawai'i and Key Major Hawai'i Tourism Markets, including the United States, Japan, Canada, Oceania, Other Asia, Europe, and Cruise

Chair Fried introduced Ms. Chun to discuss market insights and conditions. Ms. Chun discussed the statistics as contained in the board packet. She noted that the Department of Business, Economic Development & Tourism pulled their forecasts due to uncertainties related to the coronavirus.

Chair Fried noted positively that visitor spending per person is up 3%. Ms. Kimura then added that she thinks that the O'ahu vacation rentals are moving to Maui.

Ms. Chun concluded by saying that TAT collections in December 2019 were at \$319.7 million, which is up 13.1% from the previous calendar year.

8. Presentation, Discussion and Action on HTA's Financial Reports for January 2020

Chair Fried introduced Mr. Regan and Marc Togashi to present the financial reports. Mr. Regan first discussed the budget statement contained in the board packet noting that revenue sources for HTA come from TAT collections and investment income from the Department of Accounting and General Services. As of January, HTA has received \$47.4 million from these revenue sources to help with operations. He also noted that the budget reflects the reallocations for FESTPAC and the 75th World War II Commemoration. He added that \$66.14 million has been allocated for expenditures, which represents about a 76% utilization of the budget. Larger contracts are being encumbered, and payments for those contracts are starting to hit the books. He then stated that in March the order of the presented documents will change starting with the executive summary followed by the financial statements.

He then discussed the master budget summary noting that the January 2020 activity column is a good indicator of how funds are being allocated and what remains. It helps with HTA budget planning for the following fiscal year to identify which funds have been allocated.

Mr. Regan then discussed the executive summary in the board packet and identified that HTA has \$90.6 M in cash and investments for its operations, which includes a \$5 million emergency fund. HTA recorded \$6.6 million in revenue from TAT, but it was offset by \$9.6 million in expenditures.

Mr. Rafter asked with China and Korea flights being suspended, what is the plan for the reallocation of funds. Mr. Tatum responded that HTA has suspended all campaigns to China and South Korea. The team will break out the savings as a separate line item. Mr. Tatum then said that HTA wants to be part of the solution by working with the Department of Transportation (DoT) to put hand sanitizers in the airport. HTA is working with the legislature and the DoH to focus on the safety and security of residents and visitors.

Mr. Regan added that HTA has started working with the DoT to deploy units across all state airports. The DoT estimates that it will require 250 units. The DoT should have a plan regarding where to deploy the units for review tomorrow.

Mr. Regan then stated that the team is working hard to pay down the prior year's encumbrances. In January, the team worked it down to \$18.2 M from \$21 M last month. Mr. Regan commended Mr. Togashi and his team for identifying lapsed contracts or contracts without activity to reallocate those funds.

Chair Fried requested a motion to approve the financial report. Mr. Kam made a motion, which was seconded by Ms. Kumukahi. The Board voted to approve the financial report unanimously.

9. Update on the Status of the 2018 Audit Action Plan

Chair Fried introduced Mr. Regan to provide an update on the status of the 2018 Audit Action Plan. Mr. Regan stated that the Attorneys' General Office is working diligently to provide a response for the final line item.

10. Update Relating to the 2020 Legislative Session and Related Bills Relevant to HTA

Chair Fried introduced Mr. Regan to provide an update on the 2020 legislative session. Mr. Regan stated that previously, there were over 90 measures relevant to the industry that they were tracking. That number is down to 36. Mr. Regan noted that they have written over 20 testimonies for bills. The team has attended hearings and has testified. Mr. Regan provided several examples of bills the team would be interested in seeing passed, such as HB1622, which would add language to amend the allocation of TAT for operation of a Hawaiian music and dance center to also include "development," and HB1944, which would provide \$5 million for the Department of Land and Natural Resources (DLNR) parks and trails program. DLNR would have to provide a list of proposed projects to HTA for review and approval to ensure that the funds are spent on parks and trails that visitors and residents are utilizing.

Chair Fried commented that in the past HTA used a lobbyist, but believes it is much more efficient to have the team doing the work.

Chair Fried asked what the color coding means on the chart in the board packet. Mr. Regan responded that it represents the companion bills. If it is red, it has died. If it is green, it is moving forward. If it is black, they are still waiting. He then thanked Carole Hagihara for keeping the team on track. Chair Fried also recognized Ms. Hagihara.

Mr. Tatum discussed that one of the legislative priorities is to get funding to address the 'Iolani Palace bee issues in the walls and the coronation stand. Mr. Regan added that the relevant bill HB2209 is one they have been tracking and providing testimony for.

Mr. Atkins asked if HB1622 (regarding the Hawaiian music and dance center) passes, will there be \$1 million every year to operate it. Mr. Regan responded that that is up to the

legislature, but the program is ready for RFP and that they just need the new language passed. Mr. Atkins then expressed concern that the program may be developed but cannot be sustained. Mr. Regan responded that any RFP response needs to address the issue of sustainability, for example through fees or rentals.

Sherry Menor-McNamara asked if there is a bill that the team is tracking, but has not submitted testimony, if the team simply tracks it in case it becomes a bill that HTA should oppose. Mr. Regan responded those bills are currently neutral, but must be monitored closely in the event of a “gut and replace.”

11. Presentation by AEG and HVCB Regarding an Update of the Hawai‘i Convention Center Recent Operational Activities and Sales Initiatives

Chair Fried introduced Ms. Orton to provide an update on the Hawai‘i Convention Center (HCC). Ms. Orton introduced Noelle Liew, the HCC Director of Finance, to the Board. Ms. Liew stated that the HCC had a strong month because the HCC hosted the American Astronomical Society, the Sony Open annual dinner, the AAU Transpacific Volleyball Tournament, and 13 other groups generating \$1.4 million in gross revenues with a net loss of \$42,000. Ms. Liew expects February to be a softer month, but there are eight other city-wide groups with over 3000 attendees each for the remainder of the year.

Mr. Tatum asked Ms. Orton for an update on how the coronavirus is affecting groups. Ms. Orton responded that there are no cancellations as of yet, but she has received numerous questions about HCC’s cancellation policy. She noted that groups with large numbers of attendees from Japan are getting very nervous. She added that JTB is getting a lot of cancellations for the Honolulu Festival. Rotary’s Conference is coming in June and has received cancellations from mainland China attendees and likely from South Korea soon. However, there have been no cancellations of total events just attendees from certain areas where coronavirus outbreaks are affecting arrivals. Ms. Orton stated that HCC has deployed hand sanitizer stations throughout the building. The message to clients is that Hawai‘i remains a safe place to vacation.

Ms. Liew then discussed F&B numbers as contained in the board packet.

Ms. Orton introduced Mari Tait to provide updates for the Capital Improvement Projects as contained in the board packet. Ms. Tait stated that the boiler replacement and the Ala Wai waterfall projects are nearly complete. She added that they are finalizing details for permitting for the cooling tower replacement.

Ms. Orton stated that Lois Asato is retiring. Trevor Newman was promoted to Accounts Manager, Joana Hall was promoted to entry level sales manager, and Holly Elder has been hired as a contract specialist reviewing license agreements. The Sales Manager - Asia Market position is vacant and will be filled with an entry level position. Ms. Orton then discussed the local sales initiatives as contained in the board packet.

Chair Fried asked if Ms. Orton is optimistic that groups will change dates instead of cancelling. Ms. Orton responded that they are trying to accommodate date changes first, but she has advised groups to check with their hotels because the hotels may still charge for the change of dates. Mr. Tatum confirmed that the lead comes from the hotels because many are large companies with cancellation or change policies.

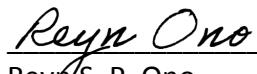
Mr. Kam asked what HCC can do to be more proactive with Rotary and FESTPAC bringing a lot of business from Asia. Mr. Tatum responded that HCC is already reaching out to all their customers to discuss options. Ms. Orton added that Smart City is offering free Wi-Fi to live stream the conference to attendees who cannot attend.

Ms. Orton introduced John Reyes, Senior Vice President, Chief MCI Sales Officer at Hawai'i Visitors & Convention Bureau. He presented the best practices of a successful citywide destination, the new citywide sales strategy, sales initiatives, and the citywide sales update as contained in board packet.

12. Adjournment

The meeting ended at 12:07 PM.

Respectfully submitted,



Reyn S. P. Ono
Recorder

4

Report of the CEO Relating to Staff's
Implementation of HTA's Programs
During February – April 2020



MEMORANDUM

TO: HTA Board of Directors

FROM: Chris Tatum, President and CEO

DATE: May 28, 2020

RE: Report of the CEO

The following narrative utilizes the Hawai'i Tourism Authority's (HTA) 2025 Tourism Strategic Plan and its four pillars (Natural Resources, Hawaiian Culture, Community, and Brand Marketing), in addition to Tourism Research, to outline the various matters the staff is currently working on or has completed since the last CEO Report dated March 19, 2020. The narrative also describes the actions conducted by the staff to implement the HTA budget previously approved by the Board.

I. NATURAL RESOURCES PILLAR

1. Aloha 'Āina (Natural Resources) Program

HTA program staff have awarded and distributed contracts to all 34 applicable 2020 awardees. There are no contracts pending execution by the awardees. HTA staff have 34 contracts fully executed and have processed first payments for 13 of those contracts. HTA staff is working with 21 contractors to complete their first deliverables so that initial payments can be made. Program staff is also following up with contractors who were granted no cost extensions to complete their work and final reporting for the 2019 cycle. Staff is preparing for mid-year progress reports from contractors in the 2020 program year.

2. DLNR Partnership

HTA staff continues to work in partnership with DLNR to identify potential projects for FY21 that work to protect Hawai'i's natural and cultural resources on state lands through various initiatives underway. HTA staff is also working on the final closeout of the current MOA with DLNR.

3. Hawai'i State Park Survey

HTA's contracting staff is working to finalize the draft request for proposals (RFPs). The project is expected to survey all state parks over a one-year period. The data and insights collected by the survey will help HTA and DLNR manage resources better to protect natural and cultural assets. HTA staff is awaiting the Uber media project's first data set to assess where gaps in the data exist. Based on this information, the park survey RFP will be adjusted to ensure maximum coverage for future data collection.

4. Sustainable Tourism Association of Hawai'i

The Sustainable Tourism Association of Hawai'i (STAH), formerly known as the Hawai'i Ecotourism Association, is continuing to make progress with the implementation of Sustainable Tourism Programs: 1) Certified Sustainable Tour Operator Program, 2) Tour Operator/Tour Guide Training Program, and 3) Sustainable Travel Education & Outreach Program. HTA staff is working with STAH to implement new digital versions of their in-person workshops and other activities due to the COVID-19 pandemic.

5. Hawai'i Green Business Program

The Hawai'i Green Business Program's primary focus of work is to assist and recognize businesses that strive to operate in an environmentally, culturally and socially responsible manner. The program has a proven record of reducing energy consumption, water savings and waste diversion, which are three key metrics in HTA's strategic plan. The program's recognition ceremony has been postponed due to the COVID-19 pandemic and HTA staff and the contractor's staff are working to determine what the next steps are to complete the scope of work before the contract expires at the end of June 2020.

II. HAWAIIAN CULTURE PILLAR

1. Kūkulu Ola Program

HTA program staff have awarded and distributed contracts to all 43 applicable 2020 awardees. There are no contracts pending execution by the awardees. HTA staff have 43 contracts fully executed and have processed first payments for 12 of those contracts. HTA staff is working with 31 contractors to complete their first deliverables so that initial payments can be made. Program staff is also working on following up with contractors who were granted no cost extensions to complete their work and final reporting for the 2019 cycle. Staff is preparing for mid-year progress reports from contractors in the 2020 program year.

2. Native Hawaiian Hospitality Association

HTA and the Native Hawaiian Hospitality Association (NaHHA) continue to build stronger ties between the Hawaiian community and the tourism industry. As a result of the COVID-19 pandemic HTA requested that all in-person trainings and workshops be postponed or cancelled. Shortly after that request was made, NaHHA developed a process to conduct limited trainings online. HTA staff is also near finalizing the scope of work for the 2021 contract.

3. Native Hawaiian Festivals and Events

2020 Prince Kūhiō Festival

The 2020 Prince Kūhiō Festival produced by the Council for Native Hawaiian Advancement (CNHA) has been cancelled for this year due to the COVID-19 pandemic. HTA staff was notified that all statewide festivities were cancelled on April 22, 2020. HTA staff is working with the contractor to close out the contract and reimburse the contractor for any expenses incurred prior to the cancellation notice for items in their approved budget.

2020 Merrie Monarch Festival Broadcast

The 57th Annual Merrie Monarch Festival was cancelled on March 13, 2020 due to the COVID-19 pandemic. HTA staff is working with the contractor to close out the contract and reimburse the contractor for any expenses incurred prior to the cancellation notice for items in their approved budget.

13th Festival of the Pacific Arts & Culture (FESTPAC)

Event organizers for the 13th Festival of the Pacific Arts & Culture (FESTPAC) announced on March 2, 2020 that the international event would be postponed due to growing global concerns over the COVID-19 outbreak. Hawai'i was to host FESTPAC 2020 for eleven days in June 2020. FESTPAC was rescheduled for June 18-27, 2021. As the pandemic evolves the FESTPAC commission is seeking guidance from the Secretariat of the Pacific Community regarding whether the festival will be postponed or possibly moved to 2024.

4. Kāhea Program

Harbors

As of March 6, 2020, the statewide Kāhea Harbor Greeting Program for calendar year 2020 has been suspended due to the recent COVID-19 global outbreak. Ports include Nāwiliwili, Lahaina, Hilo and

Kona. Work suspended includes, but is not limited to, hula, mele, lei making, distribution of maps and other collateral, as well as lei greeting with fresh flower lei. HTA staff continues to assess the program as the situation evolves.

Airports

The Kāheha Airports Greeting Program has also been suspended due to the recent COVID-19 global outbreak. Work suspended includes, but is not limited to, hula, mele, lei making, distribution of maps and other collateral, as well as lei greeting with fresh flower lei. We will continue to assess as this program as the situation evolves.

5. Resort Area Hawaiian Culture Initiative

HTA staff is currently processing year-end reports for the 2019 contracts. All 2020 activities have been suspended due to the pandemic. Resort areas included in this program include Waikīkī, Hilo, Lahaina and Kailua-Kona.

6. Hawai'i Investment Ready 2019 Cohort

The HTA and Hawai'i Investment Ready (HIR) contract supports a cohort of social enterprises with a tourism focus, all which previously received funding through the Community Enrichment, Kūkulu Ola or Aloha 'Āina programs. The intent is to elevate these social enterprises to seek other forms of capital to enhance and improve its programs. HIR has completed Modules 1-6 and will be implementing Module 7 in March 2020. HIR is now working to prepare for their post-cohort mentoring for April-December 2020.

7. Center for Hawaiian Music and Dance

This legislative session HTA tracked HB 1622 HD1 which amended language that allowed for the development and operations of the Center for Hawaiian Music and Dance. Unfortunately, due to the unanticipated closing of the Legislature due to COVID-19, many proposed measure, including this one, were placed in a pending status. If the measure is revived and the bill passes, HTA is prepared to issue the RFP and move forward with selecting a contractor and location for the center.

8. 'Ōlelo Hawai'i

HTA contract staff has finalized the contract with Bishop Museum for the project "He Aupuni Palapala: Preserving and Digitizing the Hawaiian Language Newspapers." The goal of this project is to digitize all Hawaiian language newspapers (in all repositories and personal collections). The State of Hawai'i benefits to support programs that preserve and increase access to rare and historical Hawaiian language newspapers to further the understanding and knowledge contained therein. By making readily available these important documents for education, research, and preservation, the project will provide the state with a completely unique and robust resource for Hawaiian language learners and workers to strengthen 'ōlelo Hawai'i.

III. COMMUNITY PILLAR

1. Community Enrichment

Community Enrichment Program

As a result of HTA not receiving any Transient Accommodations Tax (TAT) revenue to the Tourism Special Fund starting May 1, staff advised approximately 63 Community Enrichment Program (CEP) contractors to stop work and their contracts will be terminated. Only 8 projects will continue to be funded at reduced budgets. Staff decided to continue to fund CEP projects that scored in the top three as ranked by the CEP Evaluation Committees. These projects are especially meaningful and can uplift the community during these difficult times. They can also be enjoyed by potential visitors. These events will be streamed/broadcasted online. Fourteen events cancelled due to COVID-19. Staff is reviewing and processing payments to close out 2019 and 2020 contracts.

Festival and Event “Make-Over” Consultation Project

The festival and event “Make-Over” consulting project, which would provide four special events with a “make-over” by the International Festivals & Events Association (IFEA World), has been postponed to 2021 due to COVID-19.

Hawai'i Agritourism Initiative

HTA's Agritourism Educational Workshops with the University of Hawai'i's College of Tropical Agricultural & Human Resources – Go Farm Hawai'i, Hawai'i Agritourism Association and O'ahu Resource Conservation & Development Council (ORCD) have been postponed. The educational workshops are geared towards farms that are interested in getting into agritourism or those already in it and want to expand. The all-day workshops were to be held on Kaua'i, O'ahu, Maui, Moloka'i, and Hawai'i island in late March/early April. HTA is working with Go Farm Hawai'i for alternative dates later this year.

Non-Profit Webinars with Hawai'i Alliance of Nonprofit Organizations (HANO)

HTA partnered with HANO to hold webinars on May 7, 12, and 19. Originally these were intended to be in-person workshops held on Kaua'i, O'ahu, Maui, Moloka'i, and Hawai'i Island. However, due to COVID-19, HTA and HANO pivoted and held free webinars. The topics were also revised to address issues and concerns that nonprofits are facing during these uncertain times.

Below are the titles and descriptions of the webinars:

Rethinking Fundraising and Special Events During COVID-19 webinar

Social distancing orders have made it difficult for nonprofits to run many in-person fundraising/special events that are critical to supporting their missions. Our panelists will share lessons learned in pivoting to virtual events and creative solutions if you can't go virtual. The session will include talk story time for Q&A.

Nonprofit Finance: Strategies for Navigating During COVID-19 webinar

Panelists, Catha Lee Combs, CPA, Managing Director, Wikoff Combs & Co., LLC and KilikiniMahi, Principal, KM Consulting, will share best practices in financial management that are even more critical during the COVID-19 pandemic and discuss tips and tools for compiling and visualizing critical financial information to share with your board and funders. The session will include talk story time for Q&A and sharing lessons learned

The webinars were also recorded. They are currently available on HTA and HANO's websites.

2. Workforce Development

Ho'oilina Scholarship

The Hawai'i Tourism Ho'oilina Scholarship program provides a total of ten 4-year scholarships to the University of Hawai'i at Mānoa, Shidler College of Business, School of Travel Industry Management (UHTIM) and University of Hawai'i at West O'ahu (UHWO). Students must demonstrate academic achievement, leadership skills and an expressed interest in pursuing a hospitality, tourism or culinary education and career. The Hawai'i Tourism Ho'oilina Scholarship Selection Committee, comprised of members from the UHTIM Advisory Board, visitor industry and community, met on March 13, 2020 to make the selections. The following high school seniors were selected to receive 4-year scholarships to attend UHTIM:

- Camille Castro, W.R. Farrington High School
- Makena Cowan, Lahainaluna High School
- Tiaina Failauga, Aiea High School
- Korey Hanaike, King Kekaulike High School
- Megan Ibara, Kaiser High School
- Cody-John Sakamoto, H.P. Baldwin High School
- Quinn Sumida, Roosevelt High School
- Vivian Thach, Kaimuki High School

The following high school students received 4-year scholarships to attend UHWO:

- Jay Ann Torres, Waipahu High School
- Loryn Garcia, Farrington High School

The following community college student received a 2-year scholarship to attend UHWO:

- Celine Daclison, James Campbell High School, Leeward Community College

Hawai'i's Visitor Industry Workforce Needs Assessment

HTA's Visitor Industry Workforce Needs Assessment project, which was contracted with Anthology Marketing Group, Inc. to implement, has been pushed back due to COVID-19. Work on this project will commence later in 2020. The purpose of the assessment is to understand current and future needs. It will obtain information and data to determine the skills required and training programs that might be created or expanded to have a stable, strong and capable tourism industry workforce.

Customer Service Training Certificate and Certification of Tour Guides

Due to COVID-19, the University of Hawai'i, Kapi'olani Community College revised its training, and offered its Certificate for Customer Service Training online in addition to condensing it from 10 to 7 weeks. The training also serves as a pathway for the certification of tour guides. HTA also invested more in these trainings, and thus the classes were offered free to the public.

Registration for all five training offerings was filled within two days. Below is the training schedule:

Section	Start Date	End Date	Days (online)	Time (online)
1	05/12	06/27	Tue/Thur	9:00 - 11:00 am
2	06/03	07/18	Wed/Fri	1:00 - 3:00 pm
3	06/29	08/08	Mon/Wed	6:00 - 8:00 pm
4	06/30	08/08	Tue/Thur	3:00 - 5:00 pm
5	08/11	09/19	Tue/Thur	9:00 - 11:00 am

3. Communication and Outreach: March 2020

News Releases/Reports Issued

- News Release in partnership with the Hawai'i AgriTourism Association for the 2020 Hawai'i AgriTourism Workshops (March 3)
- Report: HTA Hawai'i Hotel Performance Report for February 2020 (March 18)
- Report: HTA Hawai'i Vacation Rental Performance Report for February 2020 (March 24)
- News Release: Hawai'i Passenger Arrivals by Air (March 25)
- News Release: Hawai'i Passenger Arrivals by Air (March 27)
- News Release: Hawai'i Passenger Arrivals by Air (March 28)
- News Release: Hawai'i Passenger Arrivals by Air (March 29)
- News Release: Hawai'i Passenger Arrivals by Air (March 30)
- News Release: Hawai'i Visitor Statistics Released for February 2020 (March 31)
- News Release: Hawai'i Passenger Arrivals by Air (March 31)

Media Relations – COVID-19

- Hawai'i Public Radio: Responded to request from reporter Ku'uwehi Hiraishi for an interview regarding FESTPAC being postponed. Advised her to contact FESTPAC instead. (March 2)
- KHON: Responded to request from reporter Kimberlee Speakman for an interview regarding the Los Angeles Clippers not coming to Hawai'i due to COVID-19. Provided statement by Chris Tatum (CT). (March 3)
- KHON: Responded to request from assignment manager David Patterson for an interview regarding the Los Angeles Clippers not coming to Hawai'i due to COVID-19. Provided statement by CT. (March 3)
- KHON: Responded to request from producer Anna Gomes for an interview regarding the Los Angeles Clippers not coming to Hawai'i due to COVID-19. Provided statement by CT. (March 3)
- KITV: Responded to request from reporter TJ Horgan for an interview regarding the Los Angeles Clippers not coming to Hawai'i due to COVID-19. Provided statement by CT. (March 3)
- Hawai'i News Now: Responded to request from producer Jennifer Wong for an interview regarding the Los Angeles Clippers not coming to Hawai'i due to COVID-19. Provided statement by CT. (March 3)
- KITV: Responded to request from reporter Nicole Tam for an interview regarding FESTPAC and Honolulu Festival being postponed/canceled. Advised her to contact the festivals directly instead. (March 3)
- KAOI: Responded to request from radio announcer Cindy Paulos for an interview regarding the coronavirus and its impact on tourism. Advised her to contact the hotels, airlines or wholesalers directly. (March 3)

- KITV: Responded to request from producer Diamond Badajos for an interview regarding FESTPAC and Honolulu Festival being postponed/canceled. Advised her to contact the festivals directly instead. (March 3)
- Hawai'i News Now: Responded to request from producer Jennifer Wong for information on the Merrie Monarch Festival and its economic impact. Advised her to contact the festival directly. (March 3)
- Hawai'i News Now: Responded to request from producer Josh Benton for HTA to join a panel discussion surrounding COVID-19. Advised her to contact DBEDT due to his parallel requests. (March 3)
- Honolulu Star-Advertiser: Responded to request from reporter Allison Schaefer for information on the impact of United Airlines' flight cuts for Hawai'i. Provided her with information from the Hawai'i Visitors and Convention Bureau (HVCB), which also confirmed that United is the largest domestic carrier. (March 4)
- Honolulu Star-Advertiser: Responded to additional request by reporter Allison Schaefer for information on Korean Airlines' decision to suspend flights and its impact. Advised her that Korean Airlines announced the cutback on March 2 and provided IIO airline data prior to the reduction. (March 4)
- KITV: Responded to request from executive producer Cherry Pascual for the anticipated release date of the February visitor statistics. Advised her that the report would be issued on March 27. (March 4)
- KHON: Responded to request from morning show anchor Kristine Uyeno for an interview about the effects of COVID-19 on Hawai'i's tourism industry. Advised her to contact DBEDT instead. (March 4)
- KITV: Responded to request from executive producer Cherry Pascual for HTA to participate in a live roundtable discussion regarding COVID-19. Advised her to contact the Department of Health (DOH) or DBEDT instead. (March 5)
- Hawai'i Public Radio: Responded to request by host Catherine Cruz for an interview on the cruise industry relating to COVID-19. Advised her to contact the cruise lines directly. (March 9)
- HAWAI'I Magazine: Responded to request by editor Catherine Toth Fox for an interview about COVID-19 on its "Have Aloha Will Travel" podcast. Advised her to contact Mufi Hannemann (MH) of the Hawai'i Lodging and Tourism Association (HLTA) or hotels and resorts instead. (March 9)
- Chicago Tribune: Responded to request by travel editor Lori Rackl for information about any hotels or resorts offering travel deals to attract customers during the pandemic. Advised her to contact the hotels directly. (March 9)
- Hawai'i Adventures & Romance Magazine: Responded to request by advertising account manager Tony Colgrove about any announcements to let visitors know that it's business as usual on Hawai'i Island and it's safe to travel. Advised him that HTA

continues to work with the state and county to monitor the evolving situation and provide updates on HTA's COVID-19 alert page and GoHawaii.com. (March 9)

- O'ahu Concierge: Drafted letter on behalf of Dr. Bruce Anderson, DOH, providing an update on COVID-19 and thanking the tourism industry for their support, for the April issue. Also provided Bruce's headshot. (March 12)
- TravelAge West: Responded to request by Hawai'i editor Marty Wentzel for an interview about the coronavirus' impact on Hawai'i's tourism industry, if it's safe to visit, and advice travel agents should give their clients. Declined request and referred her to MH. Also provided UHERO February 24 report. (March 12)
- Hawai'i Tribune-Herald: Responded to request by reporter Michael Brestovansky about the projected impacts of Princess Cruises temporarily shutting down. Recommended he contact Princess Cruises directly. Also gave him the link to DBEDT's tourism forecast and HTA's monthly visitor statistics, and recommended he watch the March 12 COVID-19 economic and financial preparedness committee's meeting. (March 12)
- Honolulu Star-Advertiser: Responded to request from reporter Allison Schaefer regarding air service to Hawai'i. Sent her links to DBEDT's air seats capacity and daily passenger counts. (March 12)
- Hawai'i News Now: CT interview on Sunrise with Mike McCartney of DBEDT regarding COVID-19 and Hawai'i's economy, including tourism. (March 13)
- Responded to an inquiry from multimedia journalist Heidi Chang regarding COVID-19's tourism impact. Suggested she contact the hotels, airlines and attractions directly. (March 13)
- Hawai'i Hospitality: Responded to associate editor Priscilla Perez Billig who requested a comment from HTA regarding the Merrie Monarch Festival being cancelled due to COVID-19. Referred her to CT's quote in the press release issued by the Merrie Monarch Festival. (March 13)
- Maui Now: Responded to request from news director Wendy Osher to list her company as a media resource on HTA's COVID-19 alert page. (March 14)
- Pacific Business News: Responded to request from reporter Christina O'Connor for an interview with CT. Provided her the letter CT sent to the tourism industry leaders. (March 16)
- Hawai'i Public Radio: Responded to reporter Ku'uwehi Hiraishi regarding Holland America's Maasdam cruise ship in Hawai'i. Recommended she reach out to the Department of Transportation (DOT) or the Joint Information Center (JIC). (March 16)
- Honolulu Civil Beat: Responded to reporter Anita Hofschneider regarding the economic impact of the coronavirus on Hawai'i's tourism industry and if HTA is still encouraging tourists to come. Told her HTA had put its marketing efforts on pause and gave her a CT quote. Also recommended she contact DBEDT. (March 17)

- KHON: Sent reporter Jenn Boneza CT's letter to the industry after getting questions about whether HTA is still advertising and asking tourists to come to Hawai'i. (March 18)
- Sent CT's letter to the industry to Hawai'i's congressional delegation. (March 18)
- The New York Times: Responded to a request from freelance writer Elaine Glusac regarding reaction from HTA to Governor Ige's directive to postpone travel for 30 days. Gave her CT's letter to the industry and also suggested she contact hotels, airlines, attractions and restaurants directly. And gave her the link to DBEDT's economic forecasts. (March 19)
- The New York Times: Responded to another request from Elaine Glusac regarding how many passengers are still arriving. Sent her the link to DBEDT's daily passenger count. (March 20)
- KHON: Responded to an inquiry from reporter Manolo Morales about how many passengers have been coming into the state. Sent him the link to DBEDT's daily passenger count. (March 20)
- WCCO: Responded to request from Eric Nelson of WCCO radio in Minneapolis for an interview regarding visitors being quarantined based on the governor's orders. Suggested he get soundbites from the day's press conference with Honolulu Mayor Caldwell and also reach out to HLTA's MH who spoke at the Governor's press conference. (March 22)
- Honolulu Star-Advertiser: CT interview with Allison Schaefer regarding COVID-19's tourism impact and other topics. (March 24)
- Honolulu Star-Advertiser: Sent Allison Schaefer the HVCB advertising campaign to customers on the mainland and worked with photographer Bruce Asato on getting photos of HTA's Department Operations Center (DOC). (March 24)
- Honolulu Star-Advertiser: Responded to request from features reporter Steven Mark for an interview with MH. Connected him with Jared Ellis of HLTA. (March 24)
- The Maui News: Responded to request from Kehaulani Cerizo for a CT interview regarding his message to the industry. Gave her CT's letter to the industry. (March 24)
- Hawai'i Public Radio: Responded to request from host Catherine Cruz regarding an interview on the tourist situation with many resorts closing across the state. The interview has been set for March 30. (March 25)
- Vox: Responded to request from reporter Frances Nguyen regarding messaging to tourists and is HTA still asking tourists to come. Provided her the message sent out through the GMTs, and advised that we paused all marketing weeks ago. Also sent the mandates from the governor and mayors. (March 25)
- The Garden Island: Responded to freelance writer Allan Parachini regarding why airlines are still advertising fares. Told him as far as we know the majority of the flights into our

state are now cancelled or are being cancelled. Also sent him the daily passenger count press release showing the large drop in passengers. (March 26)

- Hawai'i Public Radio: Responded to request by reporter Casey Harlow about getting in touch with a hotel manager to interview. Suggested he contact HLTA. (March 26)
- MauiTime Weekly: Responded to contributing editor Deborah Rybak who was seeking statistics for Kahului Airport (OGG). Sent her the links to HTA's website and research pages. (March 26)
- KITV: Responded to request from reporter TJ Horgan for access to the Hawai'i Convention Center's Kamehameha Room to shoot video of the potential site for a makeshift hospital. CT declined and referred TJ to the Army Corps of Engineers and the Hawai'i Emergency Management Agency (HI-EMA). (March 26)
- Honolulu Civil Beat: Responded to inquiry from reporter Blaze Lovell regarding how HTA is helping at the airport after a visitor arrives. (March 26)
- Honolulu Star-Advertiser: Sent reporter Allison Schaefer the photo of the heart on the Waikiki Beach Marriott Resort & Spa as a suggestion to use for their newspaper article. (March 27)
- Hawai'i News Now: Responded to request from reporter Mahealani Richardson for a response to a situation described during HNN's townhall discussion on March 26 during which a Queen's Medical Center doctor said he could not find lodging for a recovering COVID-19 patient and was putting a call out to hotels to help. Told her to reach out to MH. MH had been in contact with Mahealani and said what she was reporting was inaccurate. (March 27)
- KHON: Responded to an inquiry from reporter Nikki Schenfeld for passenger arrival numbers. Told her we were getting ready to send out the press release and to sign up to be on HTA's distribution list. (March 27)
- MauiWatch: Responded to a request from founder Neldon AZD Mamaud to be on HTA's distribution list. Told him how to sign up. (March 27)
- Honolulu Civil Beat: Contacted reporter Blaze Lovell about an error in his story saying that visitors were being taken to the Hawai'i Convention Center after getting off the plane. He said he misheard Tim Sakahara of DOT at the press conference and would make that correction. (March 27)
- KHON: Responded to reporter Nikki Schenfeld's question regarding follow-up calls to quarantined visitors. (March 30)
- Hawai'i Tribune-Herald: Responded to a question from editor and publisher David Bock about Hilo flights and why they're not being included in the daily passenger arrivals data. Explained that there are no flights currently arriving at Hilo International Airport (ITO) from out of state. (March 30)

- Hawai'i Public Radio: Responded to reporter Ku'uwehi Hiraishi regarding passenger arrivals. Explained that we aim to send the news release out daily at around noon and how she can sign up to be on HTA's distribution list. (March 31)

Media Relations – Other

- Pacific Business News: Responded to request from web editor Olivia Peterkin for information on Hawai'i Five-0's impact on Hawai'i's businesses and economy. Advised her to contact the show or locations they filmed at. (March 2)
- Honolulu Star-Advertiser: Responded to inquiry from Allison Schaefer about whether HTA's Spring Tourism Update would be held or put off due to COVID-19. Advised her that HTA will no longer be having a tourism update in the spring, and that it is not a result of the coronavirus. (March 4)
- Hawai'i Business: Responded to writer LiAnne Yu who requested an interview with CT on revitalizing culture in Waikīkī to make it a place that residents want to go to. Coordinated phone interview with Kalani Ka'anā'anā on March 13. (March 13)
- Danny Hauger Travel Podcasts: Responded to request from podcaster Danny Hauger for an attractions pass for his camera person. Suggested he reach out to the Hawai'i State Film Office. (March 14)
- Honolulu Star-Advertiser: Responded to request from staff writer Mark Ladao who was researching information on seed banking in Hawai'i. Provided list of seed banking projects supported by Hawai'i Tourism since 2017 through the Aloha 'Āina program. (March 16)

Community Initiatives and Public Outreach – COVID-19

- Wrote a message for the GMTs to share on behalf of CT regarding the situation in Hawai'i due to COVID-19. (March 13)
- Responded to visitor Ryan Sullivan on how he can submit praise for a worker on Hawai'i Island who went above and beyond. Suggested he contact the county council members. (March 15)
- Perillo Tours & Learning Journeys: Responded to Denise De Fino, director of groups and operations, regarding information on escorted group tours. Connected her with Darlene Morikawa of HVCB. (March 16)
- Responded to request from Congressman Case's communications director Nestor Garcia to meet with CT. Set up meeting for March 17. (March 16)
- Wrote CT letter to HTA board members regarding what HTA and its partners HVCB and HLTA have done regarding COVID-19. (March 16)
- Responded to State Film Commissioner Donne Dawson on whether CT would want to join in on a conference call with Sen. Mazie Hirono regarding COVID-19 impacts to the

film industry and a request for a visa waiver for foreign film crews. CT declined. (March 16)

- Wrote a quote from CT for the Pop-Up Makeke website, which HTA is sponsoring. (March 17)
- Wrote a letter from CT to the Hawai'i Convention Center clients and vendors regarding the status of the convention center. (March 17)
- Edited CT's new letter to the industry and sent it to Carolyn Tanaka (House of Representatives communications), Rep. Della Belatti, Cindy McMillan (Gov. Ige's communications director), Janice Okubo (DOH), and the county mayors. (March 18)
- Gave CT's letter to the industry to Cara Goodrich of Castle Resorts upon her request for direction from HTA. (March 18)
- Responded to an email from Savannah Coules, legislative analyst for Rep. Cynthia Thielen, wanting to know why tour buses are still being allowed to operate or who to contact. Suggested she contact the Hawai'i Transportation Association. (March 20)
- Responded to Charlotte Farmer, chief of staff for Rep. Cynthia Thielen, wanting contact information for the tour buses. Provided her the contact information available online. Also told her that Gov. Ige hadn't mandated the recommendation for groups of no more than 10 people for gatherings. (March 20)
- Responded to a request from Arlina Agbayani of HI-EMA at the Joint Information Center (JIC) for a list of consulate contacts. (March 20)
- Responded to a request by Amy Luke, office of the University of Hawai'i President, to help David Lassner get in touch with CT. CT connected with him. (March 20)
- Helped edit CT's new letter to the industry following Gov. Ige's announcement on the 14-day quarantine for all passengers arriving in Hawai'i from out of state. (March 21)
- Sent CT's new letter to Hawai'i's congressional delegation, Rep. Belatti, and the county mayors.
- Shot video of CT for Councilwoman Kym Pine's virtual townhall meeting, and sent it to her chief of staff Eliza Talbot. (March 23)
- Responded to a sales solicitation from Jacob Freeman, sales consultant for Meltwater, and declined the offer. (March 23)
- Edited a new letter from CT to the tourism industry leaders. (March 23)
- Sent new CT letter to state and county officials. (March 23)
- Responded to a solicitation for work from photographer Quinn Wharton of New York. Politely declined his offer. (March 25)

- Responded to a sales pitch from filmmaker Kelly Noecker. Told her right now all of HTA's efforts are on COVID-19 and to contact HVCB in the future regarding marketing videos. (March 27)
- Edited a new letter from CT. (March 27)
- Edited a new letter regarding the Hotels for Heroes program addressed to the hotel general managers. HLTA sent out the letter. (March 31)

Community Initiatives and Public Outreach – Other

- Ka Huina
 - Secured Hawai'i Public Radio "The Conversation" interview with John DeFries to promote the conference. Interview ran on March 10. (March 5)
 - Reached out to the Chamber of Commerce of Hawai'i (COC) to promote Ka Huina on its communications channels. COC agreed to promote the conference on its website, e-newsletter and social media. (March 5)
 - Pitched Hawai'i News Now, KHON and KITV for morning show interviews. (March 4)
 - Pitched Pacific Business News for editorial coverage. (March 4)
- Fielded complaint by Canadian visitor Francis Collins who visited O'ahu in February about the amenity fees imposed by Aston Waikiki Sunset. Recommended he provide his feedback to Aston directly, as HTA does not manage or have input on hotel/amenity fees. (March 9)
- Responded to Helena Nihipali and Maria Miranda, Ka'ū Coffee Festival sponsor coordinators, who requested HTA sponsorship. Provided information about the Community Enrichment program and informational briefing for the 2021 Request for Proposals process on April 29 in Hilo. (March 9)
- Wrote a CT quote for inclusion in the Merrie Monarch Festival's press release announcing that the event has been canceled due to COVID-19 uncertainty. (March 12)
- Drafted CT welcome letter for the 2020 LPGA LOTTE Championship at Ko Olina program book, in the event the tournament is held from April 15-18. (March 16)
- Responded to Patrick Tyrell of the Aloha Comedy Festival in 2021 asking for funding. Told him that HTA's focus right now is on the coronavirus situation, and that an RFP for community events may be issued at a later time. (March 20)

Crisis Communications – COVID-19

- Updated the HTA website daily regarding COVID-19 updates from HTA, DOH, the Governor's office, counties, CDC, and other official government sites. (March 1-31)
- Sent updates on the COVID-19 situation to a growing list of people including HTA staff, HTA board members, lawmakers, GMTs, Hawai'i's congressional delegation, county officials, visitor industry leaders and others. Updates #88 - #233 (March 12-March 31)

- Supported HTA's Department Operations Center at the Hawai'i Convention Center. (March 23-30)
- Participated in a daily Joint Information Center call. (Ongoing)
- Listened to HI-EMA's video teleconferences and took notes. (Ongoing)
- Visitor Inquiries
 - Responded to a request by future visitor Tsukumo Barrett for information about travel restrictions and the current situation in Hawai'i relating to the coronavirus. Provided information and the GoHawaii.com site. (March 2)
 - Responded to a request by future cruise visitor Sue Umphryes who asked if Hawai'i was starting to restrict tourists or ports from entering. Advised her that there are no travel or port restrictions at this time and referred her to GoHawaii.com. (March 5)
 - Responded to a request from Denver resident David Skipper who planned to visit Hawai'i Island in April and wanted to know if it would be safe to do so. Referred him to DOH's website and GoHawaii.com. (March 9)
 - Responded to a request from Indian citizen Dr. Tibar Banerjee who planned to visit Hawai'i in the first week of April via a stop-over in Tokyo and inquired about whether it's safe to travel. Referred him to DOH's website and GoHawaii.com. (March 10)
 - Responded to a request from Josh Duvell, who was going to visit Maui from Minneapolis for his wedding, regarding any advisories for weddings or gatherings. Recommended he contact the DOH for any health-related concerns, and stated that we take direction from them and the federal government. (March 12)
 - Responded to a request for advice from California resident Christopher MacDonald regarding whether he should visit Hawai'i. Sent him the link to the DOH's issues and advisories page. (March 12)
 - Responded to a request for help by Connecticut resident Jessica Mehrens in getting a refund from an Airbnb listing for a property on O'ahu. Suggested she contact Airbnb, her credit card company, RICO or the city DPP. (March 12)
 - Responded to Daniel Peterson of Boeing who asked if Hawai'i was allowing travel from the mainland and if there would be a quarantine. Advised that there are currently no restrictions for travel within the U.S. and quarantine is not mandated at this time. (March 13)
 - Responded to an email from Gabby Salimbangon regarding travel from Hong Kong and the Philippines to Hawai'i and any travel restrictions. (March 13)
 - Responded to Chicago resident Carter Luke who inquired about any travel requirements to visit Hawai'i Island from March 24-April 1. Advised him that there

- are no travel restrictions within the U.S. at this time and referred him to the DOH's website. (March 14)
- Responded to a Facebook message from Vanessa Andrews of New Zealand regarding her concerns about the Golden Oldies Netball tournament at the Hawai'i Convention Center. Suggested she contact the event organizers with her concerns. (March 16)
 - Responded to an email from Ed Chomyak of Kansas City on whether they should come to Hawai'i to visit. Sent him the link to the DOH's website. (March 16)
 - Responded to a call from Katherine Campbell of Utah inquiring about an upcoming trip to Turtle Bay Resort, wondering if all the restaurants will be closed. Told her currently that's not the case, however changes happen daily and to monitor the DOH's website. (March 16)
 - Responded to a request for information from upcoming visitor Nevada resident Stacey Chilson regarding the current situation on Maui. Referred her to the DOH and CDC's websites. (March 16)
 - Responded to an email from visitor Phyllis Walters who just returned home after visiting Kaua'i, where someone had tested positive for COVID-19. Suggested she contact the DOH with her concerns. (March 16)
 - Responded to an email from Sharon Casablanca regarding her concerns about the Golden Oldies Netball tournament at the Hawai'i Convention Center. Suggested she contact the event organizers with her concerns. (March 16)
 - Responded to a request from Bob Weiss regarding whether they should cancel their trip to Kaua'i. Referred him to the DOH's website. (March 16)
 - Responded to an email from Brian Shaughn regarding whether they should cancel their trip to O'ahu. Referred him to the DOH's website. (March 17)
 - Responded to an email from Jen VanHoutan regarding whether they should cancel their trip to Maui. Referred them to the DOH's website. (March 17)
 - Responded to Oakland resident Dean Howell who inquired about visiting Hawai'i. Gave him the quote from Gov. Ige that people should not come to Hawai'i to visit for at least the next 30 days. (March 17)
 - Replied to traveler Greg Allen regarding an upcoming trip to Kona. Gave him the quote from Gov. Ige recommending people postpone their trips to Hawai'i for at least the next 30 days as well as a link to his press conference. (March 18)
 - Responded to Colorado resident Thomas Morgan asking if he should postpone his vacation. Sent him Gov. Ige's message and the link to his press conference. (March 18)

- Responded to an email from Ann Radoc regarding a car rental refund because she can't travel. Suggested she contact the company she booked her reservations through and also her credit card company. (March 19)
- Responded to email from overtimdad@aol.com who asked if it's ok to take a cruise to Hawai'i in September. (March 19)
- Responded to an email from Larry about his upcoming trip in June and whether a U.S. citizen will be able to still travel to Hawai'i then. Told him to check the State Department and CDC's websites but that at the current time there is no restriction on travel within the U.S. (March 19)
- Responded to an email from future visitor Stephanie Butterfield asking about how we can help her get a refund from her Airbnb. Told her it's best if she goes through that company or her credit card company. (March 20)
- Responded to a Facebook message from Selene Muldowney, who was asking for help in getting a refund because she can't travel to Hawai'i. Told her it's best that she go through the company she booked through or her credit card company. (March 21)
- Responded to an email from future visitor Sierra asking about whether the travel ban will be lifted by April 26. Told her the governor has not said when the quarantine will end and that the shelter-in-place order is until the end of April but that could be extended. (March 24)
- Provided guidance for a response to future visitor John Maris, who said they're scheduled to visit three islands in mid-June. Kristen Andres (KA) provided the link to HTA's page with updates, including information about the quarantine and stay-at-home order. (March 24)
- Responded to an email from David Kinney, complaining about not getting a refund for his trip from Grand Vacations. Told him it's best if he goes through that company or his credit card company for a refund. (March 25)
- Responded to a call from Kristen Flag of Indiana regarding questions about the quarantine order. (March 27)
- Responded to an email on behalf of DBEDT from traveler Craig Reichenbach requesting help to get a refund from a B&B. Told him it's best if he goes through the company he booked with and his credit card company. (March 27)
- Responded to an email from future visitor Betty Fowler requesting information on the mandatory quarantine. Sent her the link to HTA's alerts page. (March 27)
- Responded to an email on behalf of HVCB from future visitor Nathan Perry asking if it's ok to visit in August. Told him the situation is fluid and to check HTA's alerts page for updates. (March 27)
- Responded to future visitor Maddy McDougall on behalf of HVCB asking about the quarantine. Referred her to HTA's website. (March 27)

- Responded to an email from future visitor Donald Schmidt regarding HTA's policy on accepting commercial flights to Hawai'i. Told him HTA does not regulate commercial flights. (March 28)
- Responded to an email from Pete Clement asking about the quarantine for people coming to Hawai'i by small boat. Told him it's the same orders that apply to air passengers. (March 30)
- Responded to an email on behalf of HVCB from future visitor Antonio Newkirk about the quarantine order. Sent him a link to HTA's website. (March 31)
- Resident Inquiries
 - Responded to local resident Catherine Jenkins who was disappointed about the Los Angeles Clippers not returning to Hawai'i in August. (March 3)
 - Responded to local resident Clyde Okinaka who was planning to travel to Japan and wanted to know if it's safe to travel. Provided the U.S. State Department's website. (March 3)
 - Responded to complaint from local resident Chris Storaasli about the Honolulu Festival still planning to be held. Advised her that Honolulu Festival just announced it is canceling this year's event. (March 3)
 - Returned call to local resident Gerard DeLima after he left a message regarding frustrations with tourism, but he didn't answer and his voicemail wasn't set up. (March 13)
 - Responded to an email from West Hawai'i resident Michelle Barth questioning why Hawai'i is still allowing visitors to come. Referred her to Gov. Ige's request for people to postpone their visits. (March 19)
 - Replied to a Facebook message from Dan Ramos regarding his concerns with tourists in Hawai'i and that hotels should inform their guest about the situation. (March 20)
 - Responded to a Facebook message from Debby Winklea regarding her desire to have the airports in Hawai'i closed. Told her that's something that's up to the federal government. (March 21)
 - Responded to a Facebook message from Michael Mahuka regarding his desire not to have any tourists come to Hawai'i right now and that he feels it's all about the money. (March 21)
 - Responded to Honolulu resident Larry Alfrey regarding his request to not allow non-Hawai'i residents into our state. (March 30)
 - Responded to an email from Robert and Wendy, Maui residents currently in Indonesia asking about the quarantine. (March 31)

- Miscellaneous Inquiries
 - Responded to Cilla Ordensteinz of Spezzano & Associates who asked if the Merrie Monarch Festival was going to be cancelled due to the coronavirus. Advised her to contact the festival directly. (March 3)
 - Responded to an email from Jessica Wong-Sumida regarding information about where the positive cases came from. Told her we're just sharing info from the DOH and HIPAA laws may prevent them from releasing detailed info about the patients. (March 19)
 - Replied to an email from Greg MacDonald regarding the daily passenger count. Told him it includes residents and visitors and gave him the DBEDT link. (March 20)
 - Responded to a Facebook message from Randall Low regarding how long the quarantine will last. (March 23)
 - Responded to an email from Lawrence Mast regarding the 14-day quarantine. (March 23)
- Responded to request from Jaclyn Hawse, director of communications and business development for the Battleship Missouri Memorial, for information on visitor arrivals in light of COVID-19. Provided her with the DBEDT website. (March 2)
- Responded to an inquiry from Sen. Moriwaki about any precautionary measures that should be shared with a future visitor from Las Vegas prior to his travel, March 31. Advised her that HTA urges travelers to follow public health authorities' recommendations for good hygiene and sent her the GoHawaii special alert page for visitors. Further, there are currently no travel restrictions within the U.S. (March 12)
- Drafted the inaugural daily passenger count press release as requested by Mike McCartney of DBEDT. (March 23)
- Responded to email from Amy Bakari from Hawai'i Simplified regarding updates and what she should tell customers since she has a local tour company. Sent her a link to HTA's website. (March 23)
- Provided guidance for a response to an email from Maria Hacker, advertising sales manager for Kaua'i Adventures & Romance regarding concerns about visitors coming in to Hawai'i. (March 24)
- Responded to Hilton Waikiki Beach General Manager Henry Perez asking to add his hotel to the closure list. (March 25)
- Responded to Jim Petrus of Bre Hotels asking if his four hotels in Hawai'i can be added to the list of closures. (March 25)
- Responded to Hawai'i County council member Valerie Poindexter on why Hilo Airport isn't included in daily arrivals. Advised her that currently no international or domestic flights are flying to ITO. (March 30)

- Responded to an inquiry from Sen. Gil Riviere about visitors, why they are here, and if they are staying in illegal B&Bs. (March 30)
- Responded to an email from PacWhale Eco-Adventures Executive Director Kristie Wigglesworth asking for details on how the industry bounced back after 9/11 to help her complete her cash flow projection. Suggested she reach out to DBEDT and its economists for insight. (March 30)
- Responded to request from Aqua-Aston Vice President of Sales Rhonda Khabir regarding taking some of the hotel closures off the list on GoHawaii.com. Connected her with HVCB. (March 30)
- Responded to request from Shelly Kunishige at the DOT regarding an inquiry from the manager at the Hilton Grand Vacations to verify the date a visitor came to the island. Based on the name given, told her HTA did not have that name in the database as having arrived since March 26th, when the quarantine started. (March 30)
- Responded to an email from Sea Paradise Tours Management regarding the interisland flights and quarantine orders. Told him the process to gather the data was still being formalized. (March 31)

Monthly Follower and Engagement Statistics on HTA's Facebook Page

Number of followers from March 2019 vs. March 2020: **+27.05%**

- March 31, 2019: 10,558
- March 31, 2020: 13,414

Engagement rate from March 2019 vs. March 2020: **+26,990.83%**

- March 2019: 469 daily page engaged users
- March 2020: 127,056 daily page engaged users

Paid Social Media Posts on HTA's Facebook Page

- Flight dates from March 3 – 10: Video post on the Visitor Aloha Society of Hawai'i. **Total Reach 11,476 | Total Reactions 499**

Social Media Posts on HTA's Facebook Page

- March 4: Post on the Hawai'i AgriTourism Workshops. **Total Reach 409 | Total Reactions 34**
- March 4: Post sharing the Department of Health's Facebook Live press conference to discuss the COVID-19 laboratory testing process. **Total Reach 316 | Total Reactions 10**
- March 4: Post sharing the Department of Health's Facebook Live press conference on the latest updates of the COVID-19 outbreak. **Total Reach 733 | Total Reactions 51**
- March 5: Post on the Davis Cup Tennis. **Total Reach 355 | Total Reactions 11**

- March 6: Post sharing Senator Lorraine R. Inouye's post on the Tourism Legacy Award awarded by HTA. **Total Reach** 389 | **Total Reactions** 11
- March 6: Post on the Davis Cup Tennis ceremony. **Total Reach** 497 | **Total Reactions** 25
- March 6: Post sharing the Department of Health's Facebook Live press conference on the state's response to Grand Princess Cruise members testing positive for COVID-19. **Total Reach** 647 | **Total Reactions** 54
- March 9: Post sharing KHON2 News' live video of state officials holding a press conference to discuss COVID-19. **Total Reach** 533 | **Total Reactions** 43
- March 9: Post sharing Kōke'e Resource Conservation Program, which HTA funds through the Aloha 'Āina Program. **Total Reach** 354 | **Total Reactions** 18
- March 10: Post sharing the 'Ike Na'auao series by the Council for Native Hawaiian Advancement, which HTA funds through the Kūkulu Ola program. **Total Reach** 463 | **Total Reactions** 13
- March 10: Post sharing Governor David Ige's Facebook Live press conference on the new surveillance testing for COVID-19. **Total Reach** 723 | **Total Reactions** 55
- March 11: Post on the 2-1-1 phone line available for individuals with concerns on COVID-19. **Total Reach** 623 | **Total Reactions** 28
- March 12: Post sharing KHON2 News' live video of the State committee on COVID-19 economic preparedness. **Total Reach** 846 | **Total Reactions** 65
- March 12: Post on the Ka Huina Conference. **Total Reach** 581 | **Total Reactions** 51
- March 13: Post sharing the Hawai'i Department of Transportation's installment of hand sanitizers to Hawai'i's airports statewide. **Total Reach** 846 | **Total Reactions** 82
- March 13: Post sharing the Department of Health's Facebook Live press conference on the latest updates of COVID-19. **Total Reach** 534 | **Total Reactions** 30
- March 14: Post sharing the Department of Health's Facebook Live press conference on the latest updates of COVID-19. **Total Reach** 786 | **Total Reactions** 147
- March 15: Post sharing Hawai'i News Now' live video of state officials holding a press conference to discuss COVID-19. **Total Reach** 1,110 | **Total Reactions** 146
- March 16: Post sharing the Department of Health's Facebook Live press conference on the latest updates of COVID-19. **Total Reach** 667 | **Total Reactions** 87
- March 16: Post sharing KHON2 News' live video of Mayor Kirk Caldwell's press conference on the City and County's response to COVID-19. **Total Reach** 929 | **Total Reactions** 92

- March 17: Post sharing Governor David Ige's announcement for a press conference to be held. **Total Reach** 481 | **Total Reactions** 6
- March 17: Post sharing Governor David Ige's Facebook Live press conference on measures and 15 days to slow the spread of COVID-19. **Total Reach** 1,088 | **Total Reactions** 153
- March 18: Post sharing KHON2 News' live video of Mayor Kirk Caldwell's press conference on the City and County's updated response to COVID-19. **Total Reach** 847 | **Total Reactions** 83
- March 19: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach** 947 | **Total Reactions** 76
- March 20: Post sharing Hawai'i News Now's live video of Mayor Kirk Caldwell's press conference on the City and County's updated response to COVID-19. **Total Reach** 660 | **Total Reactions** 53
- March 20: Post sharing Mayor Kirk Caldwell's Facebook Live announcing food truck and catering operators to offer free meals to kūpuna. **Total Reach** 709 | **Total Reactions** 31
- March 20: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach** 928 | **Total Reactions** 107
- March 21: Post sharing KHON2 News' live video of state officials holding a press conference to discuss COVID-19. **Total Reach** 1,096 | **Total Reactions** 156
- March 22: Post sharing KHON2 News' live video of Mayor Kirk Caldwell's press conference on the City and County's updated response to COVID-19. **Total Reach** 961 | **Total Reactions** 166
- March 23: Post sharing KHON2 News' live video of state officials holding a press conference to discuss COVID-19. **Total Reach** 817 | **Total Reactions** 75
- March 23: Post sharing Governor David Ige's Facebook Live press conference on statewide Stay-At-Home, Work-From-Home mandate. **Total Reach** 738 | **Total Reactions** 41
- March 23: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach** 762 | **Total Reactions** 49
- March 24: Post on Department of Labor and Industrial Relations' press release announcing the state's implementation of a new webform for unemployment claims. **Total Reach** 483 | **Total Reactions** 18
- March 24: Post sharing Hawai'i State Department of Education's video of Superintendent Christina Kishimoto announcing the beginning of telework for teachers. **Total Reach** 456 | **Total Reactions** 13

- March 24: Post on updates for food and financial assistance amid the COVID-19 crisis. **Total Reach 567 | Total Reactions 23**
- March 24: Post sharing Mayor Kirk Caldwell's Facebook Live of press conference on the City and County's updated response to COVID-19. **Total Reach 642 | Total Reactions 36**
- March 24: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 731 | Total Reactions 45**
- March 25: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 651 | Total Reactions 26**
- March 25: Post sharing KHON2 News' live video of state officials holding a press conference to discuss COVID-19. **Total Reach 838 | Total Reactions 28**
- March 25: Post sharing Governor David Ige's Facebook Live press conference on plans for continuing and maintaining state benefits and services amid COVID-19. **Total Reach 987 | Total Reactions 50**
- March 26: Post sharing Mayor Kirk Caldwell's Facebook Live announcing a "Farm to Car" program with the City and County and the Hawai'i Farm Bureau. **Total Reach 864 | Total Reactions 58**
- March 26: Post sharing Governor David Ige's announcement for a press conference to be held. **Total Reach 816 | Total Reactions 22**
- March 26: Post sharing Governor David Ige's Facebook Live press conference on the latest updates of COVID-19. **Total Reach 1,267 | Total Reactions 76**
- March 26: Post on empty streets of Waikīkī as a result of Governor David Ige's 14-day quarantine order. **Total Reach 651,234 | Total Reactions 366,555**
- March 26: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 1,360 | Total Reactions 20**
- March 27: Post sharing Mayor Kirk Caldwell's Facebook Live on COVID-19 testing and quarantine services for O'ahu's homeless community. **Total Reach 1,311 | Total Reactions 16**
- March 27: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 1,452 | Total Reactions 49**
- March 27: Post sharing meeting of the Special Committee Senate State of Hawai'i. **Total Reach 1,478 | Total Reactions 14**
- March 27: Post sharing Mayor Kirk Caldwell's Facebook Live on TheBus service changes. **Total Reach 1,547 | Total Reactions 35**

- March 28: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 971 | Total Reactions 45**
- March 29: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 702 | Total Reactions 20**
- March 30: Post sharing informational briefing of the Special Committee Senate State of Hawai'i. **Total Reach 738 | Total Reactions 64**
- March 30: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 733 | Total Reactions 49**
- March 30: Post sharing Governor David Ige's Facebook Live press conference on the CARES Act and the 14-Day self-quarantine for inter-island travel. **Total Reach 895 | Total Reactions 63**
- March 30: Post sharing KHON2 News' live video of state officials holding a press conference to discuss COVID-19. **Total Reach 1,915 | Total Reactions 213**
- March 30: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 499 | Total Reactions 11**
- March 31: Post sharing KHON2 News' live video of Mayor Kirk Caldwell's press conference on the City and County's response to COVID-19. **Total Reach 881 | Total Reactions 85**
- March 31: Post sharing meeting of the Special Committee Senate State of Hawai'i. **Total Reach 559 | Total Reactions 35**
- March 31: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 613 | Total Reactions 5**
- March 31: Post sharing Department of Health's "Stay Healthy, Stay at Home" campaign. **Total Reach 751 | Total Reactions 40**
- March 31: Post sharing Governor David Ige's Facebook Live press conference on the latest updates of COVID-19. **Total Reach 1,386 | Total Reactions 136**

Monthly Follower and Engagement Statistics on HTA's Instagram Page

Number of followers from March 2019 – March 2020: **+40.29%**

- March 31, 2019: 2,065
- March 31, 2020: 2,897

Engagement rate for March 2019 vs. March 2020 cannot be compared due to no posts in March 2019.

Social Media Posts on HTA's Instagram Page

- March 5: Post on the Davis Cup Tennis. **Total Reactions 9**

- March 6: Post on the Davis Cup Tennis ceremony. **Total Reactions 23**
- March 11: Post on the 2-1-1 phone line available for individuals with concerns on COVID-19. **Total Reactions 6**
- March 13: Post on the Ka Huina Conference. **Total Reactions 24**

Monthly Follower and Engagement Statistics on HTA's Twitter Page

Number of followers from March 2019 – March 2020: **+1.38%**

- March 31, 2019: 36,201
- March 31, 2020: 36,701

Engagement rate for March 2019 vs. March 2020 cannot be compared due to no tweets in March 2019.

Social Media Posts on HTA's Twitter Page

- March 5: Post on the Davis Cup Tennis.
- March 6: Post on the Davis Cup Tennis ceremony.
- March 11: Post on the 2-1-1 phone line available for individuals with concerns on COVID-19.
- March 13: Post on the Ka Huina Conference.

Internal Communications – COVID-19

- Provided John Reyes (HVCB) with information about DOT's precautionary sanitation efforts at the state airports, to inform Hilton Hawaiian Village for the GAPNA Convention. (March 6)
- Drafted letter to the GMTs about Hawai'i's first positive case of COVID-19. (March 6)
- Sent a list of hotel and attraction closures to Cindy McMillan (Gov. Ige's Office) and Charlene Chan (DBEDT). (March 23)
- Drafted information about what the DOC is doing and has completed so far, and provided to Cindy McMillan, Janice Okubo (DOH) and Charlene Chan. (March 23)
- Gave Cindy McMillan talking points for a response to someone inquiring about what to do if they see a visitor breaking the quarantine law. (March 29)

Internal Communications – Other

- Participated in a meeting with Frecia Cevallos, Tourism Specialist for the County of Hawai'i regarding the county's tourism plan draft. (March 12)

- Forwarded the Honolulu Star-Advertiser article on CT written by Vicki Viotti to HTA staff, HTA board, members and legislative tourism chairs. (March 13)
- Requested that HTA board members, HTA staff, and legislative chairs share the new HTA social media video profiling the Visitor Aloha Society of Hawai'i. (March 13)
- Forwarded message from Kelly Jackson of HI Mediation to CT as requested. (March 13)
- Approved the new HTA social media video on a Bishop Museum lei maker, but decided to hold off on putting it on HTA's social media pages until the COVID-19 crisis is over. (March 19)
- Informed HTA staff about the tsunami watch issued at 5pm for Hawai'i. Updated staff after it was canceled at 6pm. (March 24)

Legislative Session 2020

- Senate committee hearing on HB1622 HD1 – represented HTA. (March 13)
- Legislature: Wrote draft testimony for HB1947 HD1. (March 16)
- Legislature: Wrote draft testimony for HB2209 HD1. (March 16)
- Legislature: Wrote draft testimony for HCR79. (March 16)
- HTA leadership meeting to discuss special committee of senate. (March 19)

International News Bureau

- Spain: Responded to Pilar Marti of UNIONTOURS travel agency who requested a company to manage private services for a family's upcoming trip. Provided link to DMCs on GoHawaii.com. (March 2)
- UK: Responded to student Emily Coutts requesting items on Hawai'i. Sent her a link to print a brochure about 50 fun facts about the 50th state. (March 15)
- Germany: Responded to a request from Nicolò Wittke for a Hawai'i flag. Told him HTA does not purchase or hand out flags and that there are some online sites that sell them. (March 19)
- Philippines: Responded to a request from Lalaine Ignao, journalist for the Filipino Channel, for an interview regarding Honolulu Mayor Caldwell's letter to Pres. Trump. Suggested she contact Mayor Caldwell's office instead. (March 31)

3. Communication and Outreach: April 2020

News Releases/Reports Issued

- Daily News Release: Hawai'i Passenger Arrivals by Air (April 1 – April 30)
- News Release in partnership with the University of Hawai'i Kapi'olani Community College for the Certificate for Customer Service in Hawai'i (April 21)
- News Release: Hawai'i Visitor Statistics Released for March 2020 (April 29)
- Report: HTA Hawai'i Hotel Performance Report for March 2020 (April 29)
- News Release in partnership with the Hawai'i Alliance Nonprofit Organizations for the complimentary webinars (April 30)

Media Relations – COVID-19

- Honolulu Star-Advertiser: Responded to request by reporter Allison Schaefer regarding the number of employees at HTA, the Hawai'i Visitors and Convention Bureau (HVCB) and Hawai'i Convention Center (HCC), plus payroll budgets, and how many people have been laid off or furloughed. Responded that all HTA staff are still working full-time either at the Department Operations Center (DOC), or on their computers at home, or making phone calls to quarantined visitors. (April 1)
- The Garden Island: Responded to email from reporter Stephanie Shinno for an additional Chris Tatum (CT) quote about the Hotels for Heroes program following CT's remarks at a press conference. Suggested as a member of the media that she call/text in her question and provided the media advisory with details. Also connected her with the Hawai'i Lodging and Tourism Association (HLTA) and sent her CT's letter to the hotel general managers explaining details of the program. (April 3)
- Honolulu Civil Beat: Responded to email from reporter Eleni Gill regarding whether the Hotels for Heroes rooms are free to first responders and health care workers or if they have to pay a portion. Sent her CT's letter to the hotel general managers explaining details of the program and how the state/HTA will be paying for the cost. (April 3)
- KHON: Responded to request from reporter Max Rodriguez regarding what happens if people arrive in Hawai'i and don't have a place to stay. Referred him to Gov. Ige's press conference which covered the topic. (April 3)
- Hawai'i Public Radio: Responded to an email from news editor Sandee Oshiro regarding how HTA/state tourism dollars are paying for the Hotels for Heroes program. Gave her a copy of CT's letter. (April 3)
- KHON: Responded to inquiry from reporter Sara Mattison regarding visitors still arriving in Hawai'i and the number of calls that were made to quarantined visitors. (April 6)
- Travel Weekly: Responded to request from reporter Tovin Lapin for a CT interview regarding coordinating industry response and helping tourism businesses manage. CT declined. (April 6)

- Honolulu Star-Advertiser: Responded to request from reporter Allison Schaefer regarding the interisland passenger monitoring. Explained HTA's role in the process, which only involves scanning in the forms. (April 6)
- Associated Press: Responded to request from White House correspondent Anita Kumar regarding a list of hotels being used for volunteer purposes and if hotels are able to remain open. Explained that the list of accommodations participating in Hotels for Heroes is not being released, and also gave her the link to GoHawaii.com for the list of closed hotels. (April 6)
- Los Angeles Times: Responded to inquiry from freelance writer Jay Jones regarding whether the quarantine is being strictly enforced and how visitors are getting meals. Asked him to convey the message that this is not a good time for people to travel to Hawai'i and to not publish articles that might encourage travel to the islands right now. (April 6)
- KHON: Responded to inquiry from reporter Sara Mattison asking how many calls have been made to quarantined visitors since the start of the order. Advised her that HVCB and HTA staff have made about 3,300 calls since March 26. (April 6)
- KITV: Responded to inquiry from Sunshine Kuhia Smith regarding a clarification on the intended residents classification for arrivals. Explained that most are military members/families. (April 6)
- Honolulu Star-Advertiser: Responded to request from reporter Allison Schaefer for information on HTA's new program and partnership with the Visitor Aloha Society of Hawai'i (VASH) to cover the cost of sending visitors who violate the quarantine rules home, along with visitors who don't have a confirmed place to stay when they arrive. (April 6)
- Hawai'i News Now: Responded to request from executive producer Josh Meeks regarding the number of hotel rooms that have been booked through the Hotels for Heroes program. Told him thus far since the program started the day prior, 325 room nights have been booked. (April 7)
- Travel by Carla blog: Responded to email from New York-based blogger Carla Vianna offering to help promote Hawai'i and partner with HTA. Declined offer. (April 7)
- KITV: Responded to inquiry from reporter Tom George regarding the number of homeless passengers that were sent back home. Suggested he reach out to Jessica Lani Rich at VASH. (April 7)
- Hawai'i News Now: Responded to inquiry from managing editor Daryl Huff for an interview regarding a follow-up to the Hotels for Heroes program. Told him Mufi Hannemann of HLTA would contact him. (April 7)
- Hawai'i Tribune-Herald: Responded to inquiry from reporter John Burnett regarding interisland passenger numbers. Explained the process and HTA's involvement. Also told him that Hawai'i County Civil Defense has access to the HTA database regarding passengers arriving from out of state. (April 7)

- KHON: Responded to inquiry from reporter Sara Mattison regarding Hotels for Heroes. Connected her with Mufi Hannemann of HLTA and sent her the letter from CT to hotel general managers. (April 8)
- Hawai'i News Now: Responded to email from assignment manager Brenda Salgado regarding Hotels for Heroes. Connected her with HLTA. (April 9)
- Hawai'i News Now: Responded to an email from Daryl Huff regarding Hotels for Heroes. Mufi Hannemann said he also received an inquiry and would get back to Daryl. (April 9)
- KHON: Responded to email from executive producer Chanel Moke Puha regarding whether HTA wants to do a regular segment on WakeUp 2day about visitor arrivals via FaceTime. Declined opportunity but said we'll keep that option in mind. (April 10)
- Responded to questions from the Joint Information Center (JIC) in response to an email from Honolulu Star-Advertiser reporter Allison Schaefer regarding turning the Hawai'i Convention Center or hotels into makeshift hospitals or places for quarantine. Told them to check with HI-EMA or the Army Corps of Engineers. (April 13)
- KHON: Responded to inquiry from reporter Manolo Morales for an interview with CT regarding HTA's reaction to HI-EMA director Ken Hara's remarks during the House hearing about stopping visitors from being able to book a hotel room. CT declined until Hara has a plan after consulting with the Attorney General's office. (April 14)
- The Washington Post: Responded to email from reporter David Fahrenthold asking if the Trump Waikiki is participating in Hotels for Heroes. Told him no. (April 14)
- NBCNews.com: Responded to request from freelance writer Michell Broder VanDyke regarding the Merrie Monarch Festival being canceled and what it means for Hawai'i. Connected her with Amy Kalili and provided links to data on HTA's website. (April 15)
- Honolulu Star-Advertiser: Sent reporter Allison Schaefer a summary of what the HTA staff has been doing regarding the follow-up calls to quarantined visitors, per CT's request. (April 15)
- KHON: Responded to request from reporter Gina Mangieri for the daily arrivals press releases from the past few days. Directed her to the HTA alert page. (April 16)
- KITV: Responded to questions from assignment manager Diamond Badajos regarding sending visitors home, specifically Aarona Browning-Lopez. Also referred her to Jessica Lani Rich of VASH for further updates on the program. (April 17)
- KITV: Responded to request from executive producer Cherry Pascual requesting permission to shoot video of the new unemployment claims center at the Hawai'i Convention Center. Advised her to contact either the Department of Labor and Industrial Relations (DLIR) or House Communications. (April 19)
- KITV: Responded to request from reporter Nicole Tam requesting permission to shoot video of the new unemployment claims center at the Hawai'i Convention Center. Advised her to contact either DLIR or House Communications. (April 20)

- Travel Weekly: Responded to email from reporter Eric Moya asking for an interview regarding how DMOs are adjusting to the crisis. Declined opportunity saying HTA suspended all marketing efforts and is focused on the COVID-19 situation. (April 20)
- Honolulu Civil Beat: Responded to email from freelance writer Allan Paranchini who was inquiring about tourists returning to Kaua'i under the assumption that Alaska Airlines would be starting up service again on May 2. Suggested he reach out to Alaska Airlines, and he emailed back saying he was mistaken. (April 20)
- KHON: Responded to inquiry from reporter Sara Mattison asking for an update on the calls to quarantined visitors and the process. Also suggested she watch the Senate hearing from Friday, during which CT and Keith Regan (KR) spoke about the process and what HTA is doing to help. (April 20)
- Hawai'i Tribune-Herald: Responded to email from reporter Michael Brestovansky regarding interisland flights and data. Sent him the link to DBEDT's website. (April 21)
- The Garden Island: Responded to inquiry from Sabrina Bodon regarding the quarantine and calls to quarantined visitors. (April 21)
- KHON: Responded to email from reporter Kimberlee Speakman regarding two visitors who were caught breaking the quarantine order and how HTA monitors quarantined visitors. Told her to contact the Attorney General's office since they were the lead on the case. Also suggested she watch the Senate hearing from Friday, when CT and KR spoke about this. (April 21)
- Honolulu Star-Advertiser: Responded to email from multimedia editor Diane Lee regarding data to build a chart comparing passenger arrivals to last year. Advised her that HTA began collecting daily passenger count data on March 26, and that DBEDT has been compiling data all along. (April 21)
- KITV: Responded to inquiry from reporter Tom George asking about how visitors are tracked. (April 22)
- KHON: Sent link to Barberstock image library to reporter Gina Mangieri upon request. (April 22)
- Honolulu Star-Advertiser: Responded to request from reporter Allison Schaefer for information on the quarantine process. (April 22)
- KHON: Responded to request from reporter Kimberlee Speakman for information on the quarantine process and answered follow-up questions about new procedures. (April 22)
- KITV: Responded to request from reporter Annalisa Burgos for information on the quarantine process. (April 22)
- AARP.com: Responded to email from freelance writer Jen Murphy regarding the stay-at-home order and lockdown. Told her Gov. Ige hasn't yet announced his decision regarding an extension. (April 22)

- Hawai'i News Now: Responded to inquiry from Sunrise executive producer Ryan Wilson asking why DBEDT's passenger count is different from HTA's. Told him there are a number of reasons including a difference in methodology. (April 23)
- KHON: Responded to request from reporter Nikki Schenfeld for information on the quarantine process and answered follow-up questions. (April 23)
- Hawai'i News Now: Responded to email from reporter Lynn Kawano regarding the number of visitors that have come to Hawai'i since the quarantine started. (April 23)
- Honolulu Civil Beat: Responded to email from freelance reporter Allan Paranchini asking for a response to Mayor Caldwell's remarks. Declined the opportunity to comment about city/county decisions since HTA is a state agency. (April 23)
- KITV: Responded to an inquiry through the JIC from executive producer Cherry Pascual regarding new procedures HTA is rolling out to prevent quarantine breakouts. Explained what CT and KR told the senate committee the week prior, and for further questions CT defers to the Department of Transportation (DOT). (April 23)
- KHON: Called reporter Nikki Schenfeld to have her correct multiple inaccuracies in her story. (April 23)
- TravelAge West: Provided Hawai'i editor Marty Wentzel with HTA's Strategic Plan for 2020-2025 and headshot of Kalani Ka'anā'anā (KK) as a follow-up to the Local2030 Islands Network webinar in which KK was a panelist. (April 23)
- USA TODAY: Responded to email from reporter Sara Moniuszko regarding the money set aside to send visitors home. Sent her program information and contact for VASH. (April 24)
- The New York Times: Responded to email from reporter Elaine Glusac asking about the money set aside to send visitors home. Sent her program information and contact for VASH. (April 24)
- Hawai'i Business: Responded to email from senior writer Bev Creamer requesting a CT interview regarding the reopening of Hawai'i for tourism. Attempted to schedule an interview time but provided responses instead. (April 24)
- Frommers.com: Kalani Ka'anā'anā (KK) did an interview with freelancer Jeanne Writer as a follow-up to the Local2030 Islands Network webinar in which KK was a panelist. Her story is on the post-pandemic future of Hawai'i tourism. Also provided her with the HTA Strategic Plan for 2020-2025. (April 24)
- AFAR.com: Responded to email from travel news editor Michelle Baran asking about the COVID-19 Flight Assistance Program. (April 27)
- KHON: Responded to reporter Max Rodriguez requesting an interview with CT regarding the Western States Pact. Suggested he contact Gov. Ige instead. (April 27)

- TMZ: Responded to inquiry from ML Nestel asking about the alternate version of May Day. Suggested he contact the organizers of the event. (April 28)
- Hawai'i News Now: Responded to inquiry from reporter Lynn Kawano asking for the number of people who were turned around at the airport because they didn't have confirmed lodging. Advised her to contact VASH. (April 28)
- Hawai'i Public Radio: Responded to inquiry from Ashley Mizuo regarding reinventing the hospitality industry. Referred her to the Hawai'i Economic and Community Recovery & Resiliency Plan committee led by Alan Oshima. (April 29)
- eTurboNews: Responded to e-mail from Juergen Steinmetz asking HTA to join his travel website initiative. (April 29)
- KITV: Responded to inquiry from assignment manager Diamond Badajos to have CT live on their evening news to comment on the new visitor statistics. Declined opportunity and suggested she reach out to businesses who depend on tourism or tourism consultants. (April 30)
- Hawai'i News Now: Responded to email from Daryl Huff asking about the senate hearing and who from HTA is speaking. (April 30)
- Honolulu Star-Advertiser: Notified reporter Allison Schaefer about a correction to the number of follow-up calls made to quarantined visitors. The correct number was 14,000, and not 1,400. (April 30)

Media Relations – Other

- The Maui News: Responded to inquiry from managing editor Lee Imada asking for CT's response to the county's Cost of Government Commission recommending that the Maui Visitors Bureau gets zero funds during the next fiscal year. CT declined opportunity to comment. (April 14)
- Honolulu Star-Advertiser: KK did an interview with staff writer Mark Ladao regarding Hawai'i Tourism's support of seed banking initiatives in Hawai'i through its Aloha 'Āina program. (April 30)

Community Initiatives and Public Outreach – COVID-19

- Responded to email from student Ella Offley of Island School on Kaua'i, asking if there should be a limit on the number of tourists who visit Hawai'i. Advised her that right now our efforts are focused on the COVID-19 situation and suggested she reach out to lawmakers. (April 7)
- Responded to email from Laura Sofia Diaz, an NYU student who interviewed CT a month prior, requesting Hawai'i photos. Sent her the link to Barberstock. (April 8)
- Responded to email from Tianna Morimoto, University of Nevada student, asking for help with her project looking at the tourism industry and unemployment, and how this is affecting the economy. Suggested she reach out to DBEDT instead. (April 9)

Crisis Communications – COVID-19

- Updated the HTA website daily regarding COVID-19 updates from HTA, DOH, the Governor's office, counties, CDC, and other official government sites. (April 1-30)
- Sent updates on the COVID-19 situation to a growing list of people including HTA staff, HTA board members, lawmakers, GMTs, Hawai'i's congressional delegation, county officials, visitor industry leaders and others. Updates #234 - #415 (April 1-30)
- Wrote HTA's daily passenger count press releases using data provided by Jennifer Chun (JC). Sent press releases and the links to the JIC, Dan Dennison, Krystal Kawabata, Tim Sakahara, Cindy McMillan and Charlene Chan. (April 1-30)
- Participated in a daily Joint Information Center (JIC) call. (Ongoing)
- Monitored and provided copious notes on all Gov. Ige and several City & County of Honolulu press conferences and briefings. (Ongoing)
- Visitor Inquiries
 - Responded to email from future visitor Rhonda Richardson regarding when the restrictions will be lifted. Gave her the current information and referred her to the HTA website for updates. (April 1)
 - Responded to email on behalf of HVCB from Sophia Guerrero regarding whether her family can pick her up from the airport after she arrives. Told her there is no escort and that her family can pick her up but must take her straight to their home to begin the quarantine. (April 1)
 - Responded to email from San Diego resident Sean Timko asking about quarantine exemptions for workers. Sent him Gov. Ige's press release which has the email address for such exemption requests. (April 2)
 - Responded to email from Seattle resident Jeanne Miller asking about quarantine exemptions for workers. Sent her Gov. Ige's press release which has the email address for such exemption requests. (April 2)
 - Responded to email from Joyce Fults regarding concerns with her upcoming flights and explained to her that she would be considered a transit passenger. (April 2)
 - Responded to email from Heather, a wedding coordinator in California, complaining about some companies not giving refunds. Told her it's best to work directly with the companies and the credit card companies. (April 2)
 - Responded to email from Dave Hardy asking when a first responder can start flying in to get a free room through Hotels for Heroes. Told him this is not a program for visitors. Connected him with HLTA. (April 3)

- Responded to email from Bonnie and Kevin McFadden regarding their frustrations with not getting a refund from Southern Airways Express. Told them it's best to go through the company or their credit card company for a refund, and they can also file a complaint with the DCCA. (April 5)
- Responded to email from future visitor Rachel regarding whether they should still visit in June. Explained the situation and asked her to follow the updates on HTA's website. (April 6)
- Responded to email from future visitor Tom Brian regarding if they should visit in May. Explained the situation that it's not a good time to visit. (April 6)
- Responded to email on behalf of HVCB from future visitor Nelson asking if he should still visit Hawai'i in June. Told him that it's a fluid situation and to check HTA's website for updates. (April 6)
- Responded to email from Oleg Serdyuk asking if Hawai'i Island will be open in mid-May. Told him now is not a good time to visit, and that if he comes he will have to undergo a 14-day quarantine. (April 6)
- Responded to email from future visitor Arlene of California if HTA is advising California residents to cancel their plans in June. Told her that the Governor's mandates are not specific to where someone lives and to check HTA's website for updates. (April 7)
- Responded to email from Elaine Rushton complaining about the Waikiki Banyan condos not giving her a refund for canceling. Told her it's best if she goes through the company she booked through or her credit card company for a refund. (April 7)
- Responded on behalf of HVCB to future visitor Jen Spangler of Virginia regarding whether they should visit Hawai'i this summer. Told her the situation is fluid and to check HTA's website for updates. (April 7)
- Responded to email from future visitor Tom Thompson regarding his upcoming trip. Explained the quarantine order. (April 7)
- Responded to call from Roxie from Arizona. (April 7)
- Responded to email on behalf of HVCB from future visitor Alejandro Delgado asking about the quarantine order. (April 8)
- Responded to email from future visitor Jacob Spagnuolo of Michigan asking about the quarantine. Told him if he comes May 9-13, he will have to undergo self-quarantine for his entire trip. (April 10)
- Responded to email from future visitor G.L. Woods of Indiana asking about the quarantine. Told him if he comes May 9-17, he will have to undergo self-quarantine for his entire trip. (April 10)

- Responded to email from future visitor Paula Della Fortuna asking about the quarantine. Told her if she comes on May 18 she will have to undergo self-quarantine and told her to check HTA's website for updates. (April 10)
- Responded to email from future visitor Art Chavez about the quarantine and if it'll be in effect in June. Told him to check HTA's website for updates because the situation is fluid. (April 10)
- Responded on behalf of HVCB to David Choat regarding a question about coming to Hawai'i in August. Told him to check HTA's website for updates and also that once the orders are lifted it will be a while until everything is back up to speed. (April 10)
- Responded to email from Reise Chambers asking if she can come to be with her daughter weeks before she gives birth on O'ahu and if she can stay in their home. Told her she may want to check with her doctor if it's safe to be near her daughter or the baby, and that she is allowed to quarantine in their home. (April 10)
- Responded to future visitor Rob Scarcelli of Wisconsin asking about the quarantine. Told him if he comes on May 7, he will have to undergo self-quarantine for his entire trip. (April 10)
- Responded on behalf of HVCB to email from future visitor Sara Winn asking about the quarantine and if it'll be in effect in June. Told her to check HTA's website for updates because the situation is fluid. (April 10)
- Responded to email on behalf of HVCB from future visitor Jay Moretz asking about his trip in June. Told him the current dates of the quarantine and stay-at-home orders, and to keep checking HTA's website for updates since the situation is fluid. (April 10)
- Responded to email from future visitor Anne Harvey asking if she should still come to Hawai'i in May. Explained the quarantine and told her to go to HTA's website for updates. (April 12)
- Responded to email from future visitor Janie Goss asking if she should still come to Kaua'i in June. Explained the situation told her to go to HTA's website for updates. (April 12)
- Responded to email from Kim Fleming who said she will come to Hawai'i on May 12 because she can't get a refund. Explained the quarantine order. (April 12)
- Responded to email from Jeff Elmore asking for advice on when they should come to Hawai'i since they had to reschedule their trip. Referred him to HTA's website for updates. (April 12)
- Responded to email from future visitor Michelle Todd asking if she should still come to Hawai'i in May. Explained the quarantine and told her to go to HTA's website for updates. (April 13)

- Responded to email from future visitor Sue Umstead of Pennsylvania asking if she should still come to Hawai'i in May. Explained the quarantine and told her to go to HTA's website for updates. (April 13)
- Responded to email from Clara Patterson complaining about not getting a refund from her O'ahu lodging Hotel Beach 15 Steps Waikiki. Told her it's best if she goes through the company she booked through or her credit card company for a refund. (April 13)
- Responded to email on behalf of HVCB from Tim O'Donnell, asking if they should cancel their trip in June. Told him things are fluid and to check HTA's website for updates. (April 13)
- Responded to request from RJ Kilbert asking what to expect if he comes to Hawai'i in May. Sent him the quarantine information and link to HTA's website. (April 14)
- Responded to email from future visitor Tom Draper asking if he should still come to Hawai'i in May. Explained the quarantine and told him to go to HTA's website for updates. (April 14)
- Responded to email from future visitor Deborah Clark of Florida complaining that the vacation rental she booked on VRBO isn't giving her a refund. Told her it's best if she goes through the company she booked through or her credit card company. (April 14)
- Responded to email from future visitor Josh Clark asking if he should still come to Hawai'i in May. Explained the quarantine and told him to go to HTA's website for updates. (April 14)
- Responded to email on behalf of HVCB from Kenneth Roberts asking if he should postpone his vacation in June. Told him about the situation and to go to HTA's website for updates. (April 14)
- Responded to email on behalf of HVCB from Lisa McGee asking about coming to Hawai'i at the end of April. Told her about the quarantine, that it's not a good time to come, and to go to HTA's website for updates. (April 14)
- Responded to email on behalf of HVCB from Alice Snyder asking when Hawai'i will reopen to tourism. Told her about the situation and to go to HTA's website for updates. (April 14)
- Responded to email from future visitor Riley Weidner regarding their upcoming trip in July. Explained the situation and suggested checking HTA's website for updates. (April 15)
- Responded to email from Raiz Herbal asking if he can come to Hawai'i to visit from Canada. Told him about the quarantine and now is not a good time to visit, and to check HTA's website for updates on the situation. (April 15)

- Responded to email from Jacquelyn asking if she can come to visit her friend in hospice. Explained the situation and quarantine orders. (April 15)
- Responded to email from Jonathan Johnston regarding his upcoming trip in May. Told him about the situation, quarantine, and to go to HTA's website for updates. (April 15)
- Responded to email on behalf of HVCB from Bruno Seixas regarding what the situation will be like in Sept. Told him it's a fluid situation and to check HTA's website for updates. (April 16)
- Responded to email on behalf of HVCB from future visitor Sherae Davis regarding what the situation will be like in July or August. Told him it's a fluid situation and to check HTA's website for updates. (April 16)
- Responded to email from future visitor Vicky Martinez asking for help in getting a refund for the vacation rental she booked on Maui. Told her it's best if she goes through the company she booked through or her credit card company. (April 17)
- Responded to email from future visitor Michael Rowan asking for help in getting a refund for the vacation rental he booked on Kaua'i. Told him it's best if he goes through the company he booked through or his credit card company. (April 17)
- Responded to email from Natasha Shumate regarding if she can travel to see her mom on Kaua'i. Explained the quarantine order and to check for updates on HTA's website. (April 18)
- Responded to email from Dick Osmon complaining about not getting a refund for a vacation rental booked through VRBO. Told him it's best if he goes through the company or his credit card company for a refund. (April 19)
- Responded to an email from future visitor Michelle Crawford asking what to expect if she comes to Hawai'i on May 1. Explained the quarantine order and that now is not a good time to visit. (April 20)
- Responded to an email on behalf of HVCB from future visitor Nesha Brumley asking what to expect if she comes to Hawai'i on May 8. Explained the quarantine order and that now is not a good time to visit. (April 20)
- Responded to an email on behalf of HVCB from future visitor Sharon Trout asking what to expect if she comes to Hawai'i on May 31. Explained the quarantine order and that now is not a good time to visit. (April 20)
- Responded to an email on behalf of HVCB from future visitor Brent Burr asking what to expect if he comes to Hawai'i on May 6. Explained the quarantine order and that now is not a good time to visit. (April 20)
- Responded to an email on behalf of HVCB from Jeremie Perry, who owns a second home in Kona, asking what to expect if he comes to Hawai'i on May 1 and if he can go to the hardware store. Told him about the quarantine order and that he can't go to the store while under quarantine. (April 20)

- Responded to an email on behalf of HVCB from future visitor Matt Schiavon, interested in booking a vacation in June. Told him now is not a good time to travel to Hawai'i and to go to HTA's website for updates. (April 20)
- Responded to email from Kimberly Lacy-Ralls asking what to expect if she comes to Hawai'i on May 16. Explained the quarantine and to monitor HTA's website for updates. (April 20)
- Responded to email on behalf of HVCB from Donna Huetttenmeyer asking what to expect if she comes to Hawai'i on June 2. Explained the situation and to monitor HTA's website for updates. (April 20)
- Responded to email on behalf of HVCB from Toby Wallace, who was planning to book a trip to Hawai'i in July. Explained the situation and to monitor HTA's website for updates. (April 20)
- Responded to email on behalf of HVCB from Tami Bouse asking if she should cancel her trip planned for June 28. Explained the situation and to monitor HTA's website for updates. (April 20)
- Responded to email from future visitor Tom Draper asking whether the quarantine will be extended. Told him the situation is fluid and that it may be depending on the situation. (April 21)
- Responded to email from future visitor Lisa Englade regarding her upcoming trip planned for July. Told her the situation is fluid and to check HTA's website for updates. (April 21)
- Responded to email from Clint Spencer of Utah wondering if Hawaii will still be on lockdown in June and that he'll probably rent a vacation rental. Told him the situation is fluid, about the situation with vacation rentals and to check HTA's website for updates. (April 22)
- Responded to email from future visitor Cheryl Footer asking if they should postpone their May trip. (April 23)
- Responded to email from Gabriel Remijio asking what it will be like in Hawai'i in August. Told him it's a fluid situation and to check HTA's website for updates. (April 23)
- Responded to email from Maria Popham regarding their upcoming trip secured for June. Told her that Gov. Ige is expected to make an announcement regarding updates to the quarantine and stay-at-home orders shortly, and to check HTA's website for updates. (April 23)
- Responded to email from Vlad Kudelin regarding whether he should visit since he noticed that visitors are still coming to Hawai'i. Explained what a visitor is and about the quarantine order. (April 23)
- Responded to email from future visitor Wes Smith regarding whether he should still keep their reservation or postpone. (April 23)

- Responded to email from Randy Leighty on behalf of HVCB regarding his upcoming travel plans for June and whether he should cancel. (April 23)
- Responded to email on behalf of HVCB from Tina Bohrer asking if Hawai'i will be open to visitors in December. Told her to keep checking the updates on HTA's website. (April 24)
- Responded to email on behalf of HVCB from Courtney Brennan asking if she can still come to Hawai'i in July. Told her to keep checking the updates on HTA's website. (April 24)
- Responded to email on behalf of HVCB from Melissa Lively asking if she can still come in to Hawai'i July. Told her to keep checking the updates on HTA's website. (April 24)
- Responded to email from Krista Parma asking about her upcoming trip in May. Told her to watch the Governor's press conference and to check HTA's website for updates. (April 25)
- Responded to email from Jeff Nickerson asking about his upcoming trip in May. Told him to watch the Governor's press conference and to check HTA's website for updates. (April 25)
- Responded to email from Charlie Brown asking about his upcoming trip to visit his cousin. Told him to watch the Governor's press conference and to check HTA's website for updates. (April 25)
- Responded to email from Andrea Ochoa regarding their upcoming trip in June and if they have to quarantine. (April 25)
- Responded to email from Stephanie Luciano regarding their upcoming trip in August. Told her to check HTA's website for updates and sent a link to an article about the quarantines. (April 26)
- Responded to email from Janice King asking for help in getting a refund from VRBO. Told her she should go through the company she booked through or her credit card company. (April 26)
- Responded to email on behalf of HVCB from Sarah Evans of Washington State asking if she should cancel her trip in May. Explained the quarantine order. (April 27)
- Responded to email on behalf of HVCB from Erika Bertotti asking if she should cancel her trip in May. Explained the quarantine order. (April 27)
- Responded to an email on behalf of HVCB from Steve Barnett asking when Hawai'i will reopen. Told him to check HTA's website for updates. (April 27)
- Responded to an email on behalf of HVCB from Chip Childers if the quarantine will be lifted by June. Told him to check HTA's website for updates. (April 27)

- Responded to email from Crystal Dize inquiring about whether she should book a vacation rental in Windward O'ahu. Told her that O'ahu short-term rentals are not allowed under the emergency order and to also check DPP's website since some of the short-term vacation rentals on O'ahu do not have a permit. (April 28)
- Responded to an email from William Barnett asking if they should cancel their June trip. Sent information about the quarantine and to check HTA's website for updates. (April 28)
- Responded to email from Norma Ballard who has a trip planned for June. Told her about the quarantine and to check HTA's website for updates. (April 28)
- Responded to email from Marty Hoover asking about their upcoming trip in June and if they will have to be in quarantine. (April 29)
- Responded to email from Kathy Swenson of Boise, asking if they quarantine will be in place in June. Told her to check HTA's website for updates. (April 30)
- Resident Inquiries
 - DOT: Responded to email from Shelly Kunishige regarding a question from a resident of the Kuhio at Waikiki, concerned that some people at his condo are breaking the quarantine law. Told her to have him call 911. (April 1)
 - Responded to email from resident Angela DeVargas, correcting her misinformation alleging that HTA is ruining O'ahu and that she feels there should be no rental car companies in Hawai'i. (April 1)
 - Responded to email from Nani Ka'apana regarding why some COVID-19 cases are considered pending. (April 1)
 - Responded to email from Maui resident Susan Wilesmith regarding why she saw 50 tourists on the beach and not quarantined. Told her to call 911 ASAP if she knows of anyone breaking the order because it's a criminal offense. (April 2)
 - Responded to email from Maui resident Scott regarding his concerns with having visitors still coming to Hawai'i. Also explained who the visitor category may include and that it's not only leisure vacationers. (April 5)
 - Responded to email from Kona resident Steve Whetzel regarding his concern with visitors still coming to Hawai'i. (April 6)
 - Fielded call from Maui resident Kathy Ryan who had a complaint about visitors staying in an illegal vacation rental next door. Provided her with the contact information for Maui County's COVID-19 Call Center.
 - Responded to email from Tracy Owens, whose daughter attends the University of Hawai'i but is currently at home on the mainland and will be coming back to the islands soon. Explained the quarantine order. (April 7)

- Responded to email from Maui resident Victoria Bianchetti, who says she's stuck in Argentina and wants to come home. Told her that most airlines have cut the amount of flights to Hawai'i and that when she does come home she will have to obey the 14-day mandatory quarantine orders. (April 7)
- Responded to email from Hawai'i resident Dawn Leilani Laudise asking why visitors are still being allowed into Hawai'i. (April 10)
- Responded to email from Scott of Maui regarding police and enforcement of visitors. Suggested he contact the police departments with his questions. (April 10)
- Responded to email from Windward O'ahu resident John Reppun regarding his opinions on the state's handling of the COVID-19 situation. (April 10)
- Responded to email from Michael Miller of Captain Cook, asking if there are hotels open on O'ahu since he has to come for a medical procedure. Connected him with HLTA. (April 14)
- Responded to email from Pi'ilani of Kapolei who is traveling abroad and wondering if the quarantine applies to her if she comes home. (April 16)
- Responded to email from Kona resident Babette Morrow asking why there were no Kona flights listed when her daughter came home. Figured out she was mistaken about the date. (April 18)
- Responded to email from Kailua resident Bill Crook regarding why visitors can't be quarantined in a specific location and why people are still coming to Hawai'i on vacation. Explained that the airlines can't discriminate against paying passengers, and that most of the positive cases are in returning residents. (April 19)
- Responded to email from resident Spencer Gibu asking that we reward the kama'aina for a job well done in staying in their homes. Suggested he reach out to the hotels. (April 22)
- Responded to email on behalf of HVCB from Hawai'i resident Saleem Ahmed, who is having someone from out-of-state visit him. Sent him answers to his questions. (April 23)
- Responded to email from O'ahu resident Fred Birkett asking if he can travel to Kaua'i for his job and if he has to follow quarantine since he says he's an essential worker. Sent him the email address for exemptions. (April 23)
- Responded to email from resident Randy Chin saying we seem to have trouble tracking mainland visitors and offering recommendations. Told him to call 911 to report any violators - residents and visitors who are supposed to be quarantining. (April 23)

- Responded to email from Waikoloa resident Mark Gordon asking why HTA is using TAT funds to send quarantine violators home. (April 24)
- Responded to email from Jonathan Li of Honolulu asking why some of the airlines aren't posting notices about the quarantine on their websites. Told them HTA/HVCB has sent notices to all of the airlines still flying to Hawai'i. (April 25)
- Responded to email from O'ahu resident Rayce Tamanaha asking about flying to Maui. Explained that the quarantine orders apply to interisland travel too. (April 25)
- Responded to email from new Hawai'i resident Dan Judge saying he can't believe the negative attitude residents have towards visitors and the proposals for additional restrictions. (April 25)
- Responded to email from David Kahn of Makawao asking about interisland data and a breakdown of definitions for essential, leisure and resident passengers. (April 25)
- Responded to email from O'ahu resident Charles Hoffman asking about the current short-term rental law for Waikīkī. Told him that they are not considered as essential businesses right now and are not allowed to operate. (April 27)
- Responded to email from Hawai'i resident Janet Ishikawa asking if her daughter can come home to visit them for a week. Explained the quarantine order. (April 27)
- Responded to email from O'ahu resident Roger Tansley asking what to do about a suspected illegal vacation rental. (April 29)
- Responded to email from Kaua'i resident Kellie McEvoy asking about the data HTA puts out. (April 29)
- Responded to email from Matt Moriyama asking hotels to open for locals. (April 30)
- Responded to email from Bob Parry regarding whether transit passengers have to do the 14-day quarantine. Told him no, as long as they don't leave the airport. (April 1)
- Responded to email from former HI-EMA director Vern Miyagi regarding intended residents. (April 1)
- Honolulu Mayor's office: Re-sent Mayor Caldwell's communications director Alexander Zannes the latest passenger arrivals data. (April 1)
- Dept. of Taxation: Responded to request from Rona Suzuki regarding who at HTA makes follow-up calls to the quarantined visitors. Referred her to Pattie Herman and Bobbie Okamoto of HVCB. (April 2)

- Responded to email from Isami Yoshihara regarding who falls in the intended resident category versus visitor. (April 2)
- Responded to email from Magnum P.I. set decorator Julieann Getman requesting a list of closed hotels and hotels participating in Hotels for Heroes. Referred her to GoHawaii.com and told her the list of participating hotels is not being published. (April 4)
- Wrote a blurb for the daily news digest regarding the Hotels for Heroes program, and emailed it to Dan Dennison, Charlene Chan, Cindy McMillan and CT. (April 2)
- Responded to email from Honolulu City Council member Joey Manahan, who asked where the visitors are coming from. Explained who gets classified as a visitor and what the process is regarding calls to the hotels and follow-up calls. (April 5)
- Responded to email from Faith Chase who requested HTA's 2019 Visitor Plant Inventory Report. Provided her the link. (April 5)
- Responded to email from Marianne Martin of Whalers Cove questioning why visitors are still arriving on Kaua'i. Explained how most of the passengers are either crew or returning residents and that the FAA will not allow Hawai'i to close its airports. (April 6)
- Responded to request from Christine Culihanos inviting Marisa Yamane (MY) to be on their pau hana crisis communications panel. Declined the opportunity because we can't make the commitment right now. (April 6)
- Responded to email from Frank Stelzer asking what the rules are for people coming by small boat. Told him it's the same as those coming to Hawai'i by air. (April 6)
- Responded to request from Sen. Glenn Wakai for the links to the emergency proclamation and press release regarding essential workers. (April 6)
- Responded to email from Jim Petrus of Bre Hotels asking for information on airlift. Gave him the links to the research section on HTA's website. (April 7)
- Responded to email from Tracy Weidie asking about updates regarding the Kailua Whole Foods employee who tested positive. Told her no, and that the media likely got the information from a company spokesperson on the mainland. (April 7)
- Responded to email from Isami Yoshihara regarding his ideas for HTA. (April 7)
- Responded to email from Jay Takamiya questioning why Hawai'i is still allowing visitors to arrive. Explained the visitor category. (April 7)
- JIC: Asked Dan Dennison of the Joint Information Center to correct HTA's section in the daily news digest regarding the Hotels for Heroes program. (April 7)
- Responded to email from Bill McGaw, who owns vacation rentals and says he shut them down but is wondering why others aren't doing the same. (April 7)

- Responded to email from Honolulu City Councilman Joey Manahan regarding his concerns about visitor arrivals. (April 7)
- Responded to call from Dr. Christina Mark asking about Hotels for Heroes. Told her about the program and who to contact for a room. (April 7)
- Responded to call from Jeff Gillam wanting to let CT know how his company can help Hotels for Heroes with meals for first responders and health care workers. (April 7)
- Responded to call from Ruben Kanoho on how to get a room through Hotels for Heroes. (April 8)
- Responded to email from student Ayush Iyer who wanted information about Hawai'i for his school project. (April 8)
- Responded to inquiry from Stacy Wong, communications manager for Healthcare Association of Hawai'i, asking for Hawaiian Airlines contact information regarding free airfare for healthcare workers. Connected her with the person in charge of the program. (April 8)
- Hawai'i County Mayor's office: Responded to inquiry from Jonnette Soares-Padilla asking for updated phone numbers for unemployment requests. Sent her the Dept. of Labor and Industrial Relations' press release. (April 8)
- Governor's office: Responded to email from Kym Sparlin, director of intergovernmental relations and policy, regarding private planes. Told her those passengers are being counted. (April 8)
- Responded to email from Rep. Richard Onishi, regarding the definition of "transit" passenger and questions about where the visitors are staying. (April 9)
- Responded to email from Rachelle Hennings of VASH Hawai'i Island regarding why Hilo Airport is not listed in the daily passenger count. Told her it's because there are currently no flights from out-of-state arriving at ITO. (April 9)
- Mayor Caldwell's office: Responded to email from communications director Alexander Zannes regarding a question about Hotels for Heroes. Explained how the program works. (April 9)
- Called Arlina Agbayani of HI-EMA to ask about what Adjutant General Ken Harasaid regarding his doubts that visitors are not following the quarantine order. (April 9)
- Responded to email from Nani asking questions about the confirmed cases numbers. Told her to contact the DOH. (April 10)
- Responded to email from Michelle Mitchell, president of Hawaii Family Health in Hilo, regarding exemptions for health care workers. Told her to contact covidexemption@hawaii.gov, and sent her the Governor's press release. (April 10)

- House of Representatives: Responded to communications director Carolyn Tanaka, who asked for an update on the amount of people VASH has sent back home through the HTA-sponsored COVID-19 Flight Assistance Program. (April 13)
- Responded to email from Jolene Schuerman of Costco Travel asking for the link to the combined monthly Hawai'i arrivals by air. (April 13)
- Responded to email from Sen. Glenn Wakai asking if there's a website for residents to go to that describes the social distancing and curfew rules. Told him to send them to HTA's website. (April 13)
- Responded to email from Cathy Archulet asking what a transit passenger is. (April 13)
- Spoke with Arlina Agbayani of HI-EMA explaining HTA and HVCB's role in making calls to quarantined visitors. Also provided an update on the number of calls made so far. (April 13)
- Sent the JIC a blurb for the Daily News Digest regarding an update on booked room nights through Hotels for Heroes. (April 14)
- Responded to email from Sean Dee, Outrigger Hospitality Group's executive VP, asking for a list of closed hotels. Sent him the GoHawaii.com link. (April 14)
- Responded to email from Caleb Haastrup asking for a Hawai'i flag. Told him that HTA does not purchase or give away flags but there are sites online where he could purchase one. (April 14)
- Responded to email from Maui County councilman Shane Sinenci, asking why the arrival numbers don't add up. Told him that he needs to also add in crew, transit and intended residents. (April 14)
- Responded to request from Susan Brown who is the Australian Consulate-General asking for a list of hotels that are open or closed. Sent her the link to GoHawaii.com. (April 14)
- Gov. Ige's office: Responded to email on behalf of Gov. Ige from resident Marvin raising concerns about tourists in Hawai'i. (April 15)
- Responded to email from Greg Gadberry of the Maine Tourism Office asking about timeshares. Told him many of them have shut down and gave him the link to the hotel closures on GoHawaii.com. (April 15)
- Responded to email from Phillip Neibaur, who represents a private boarding school in Utah, and had a question about the quarantine for one of their students who is returning home to Hawai'i and a staff member who is accompanying him. (April 15)
- Congressman Ed Case's office: Provided total passenger count from incoming flights to Hawai'i from March 26-April 14 upon request. (April 15)

- Responded to email from Kika Bukoski asking about the definitions of intended resident and transit. (April 16)
- Responded to email from Annon saying that an AVP beach volleyball player is spreading misinformation. Told him that he should reach out to AVP and that HTA is not sponsoring AVP this year. (April 16)
- Responded to email from Janet Snyder, Hawaii County PR specialist, asking if the DOH issued best practices for homemade face masks. Told her no but sent her the link to the CDC's recommendations. (April 16)
- Responded to email from Sen. Gilbert Keith-Agaran asking if HTA is keeping track of whether arrivals are going to more than one island. Told him no. (April 16)
- Responded to email from Conrad Pels, captain of a private jet, asking about the quarantine if his passengers don't get off the plane, and they're just coming to refuel. Told him they won't have to undergo a quarantine in that situation. (April 16)
- Responded to email from Adam Engelman asking about short term rentals. (April 17)
- Responded to email from Ann Nishida, corporate communications senior manager of Hawaiian Telcom, regarding the visitor arrival numbers, and if there's a comparison. Sent her the link to DBEDT's website. (April 17)
- Responded to email from HTA board member Kyoko Kimura asking why a flight to Kaua'i had no crew members. Explained that it was a private jet and the pilot dropped off the passengers then took off. (April 19)
- Gave talking points to Gov. Ige's communications director Cindy McMillan regarding a question about people violating the quarantine order. Told her to have them call 911 ASAP since it's a criminal offense. (April 19)
- Responded to email from Spencer Mortimer, who operates a 12-unit apartment complex in Kihei, asking to be part of Hotels for Heroes. Connected him with HLTA. (April 19)
- Responded to travel consultant Kathy McCormick on behalf of HVCB regarding when the quarantine order will be lifted. Told her it's a fluid situation and to check HTA's website for updates. (April 20)
- Responded to email from Steven Resnik wondering if the quarantine will be extended. Told him the situation is fluid and that it may be depending on the situation. (April 21)
- Responded to email from HPD officer Stephanie Virardi regarding a report of quarantine violation. (April 21)
- Responded to email from Nancy Rasmussen asking when the quarantine will be canceled. Told her it's up to the Governor depending on the situation and to check HTA's website for updates. (April 22)

- Responded to email from Aybars Oksuz of Maryland company Incoming America asking for information on a local travel agency because they want to add a tour to Hawai'i in 2021. Suggested they reach out to HVCB. (April 22)
- Responded to e-mail from John Reppun asking about the breakdown of visitors and how many are leisure travelers. (April 22)
- Responded to request from Joanne Rodriguez asking about the quarantine and what's allowed/not allowed. (April 23)
- Responded to email from travel videographer Jordan Ward asking for feedback on the photos he took from his recent trip to O'ahu. (April 23)
- Responded to sales pitch from Andy Cochran trying to sell HTA face masks. (April 23)
- Responded to email from Arpy Dragffy of the Vancouver Tourism and Hospitality Recovery task force regarding working groups to connect him to. Sent him the press release with contact information for Alan Oshima who was appointed to head Hawai'i's committee. (April 23)
- Responded to sales pitch from +PositiveTravel sales Francesca Canzone regarding its biodiversity index. Declined offer. (April 24)
- Responded to email from Honolulu Police Sgt. Malu Napoleon regarding a suspected illegally operating vacation rental. Followed up with phone calls and forwarded information to KR, who sent it to the city's Dept of Planning and Permitting. (April 24)
- Helped edit the DOT's draft press release regarding the passenger verification process. (April 24)
- Forwarded the JIC the link to Gov. Ige's subtitled message on YouTube addressing the Japanese tourism market. (April 25)
- Responded to email from Sharon Trout making suggestions about testing. Told her to reach out to the DOH. (April 25)
- Responded to email from Liping Liu to be added to the HTA distribution list. Told her how to sign up. (April 26)
- Kauai County: Provided the link to Barberstock to Taires Hiranaka, who shoots and edits Mayor Kawakami's daily video updates. (April 26)
- Gov. Ige's office: Responded to inquiry from Zach Espino asking for a general response to travelers asking for help in getting refunds. (April 27)
- Responded to email from Becky Mello asking for help in changing information she entered on the Safe Travels app. Told her to contact the Dept. of Taxation which is in charge of the app. (April 27)

- Responded to email from Ellen Orgera criticizing some of the proposed ways to keep track of visitors. Told her that it's up to the Governor and Attorney General. (April 27)
- Responded to question from the JIC regarding a question from Alyssa Joy of Maui asking if her sister can put a mobile number on the Agriculture form because they don't have a landline. Advised that it's ok, and that the mobile number will be checked at the airport. (April 27)
- Responded to email from HPD Officer Jooney Hong of the Waikīkī district asking for help in checking if someone arrived within the past 14 days. (April 27)
- Contacted HPD deputy chief John McCarthy to ask how we can help them better enforce the quarantine order. Worked on a process to get the information from HTA's database of people required to be quarantined to the HPD dispatchers. Helped to close this loophole. (April 27)
- Gov. Ige's office: Was forwarded an email that was sent to Gov. Ige by Russell Calvin asking about an exemption since they're coming for a funeral. Told Dixie Thompson of Gov. Ige's office that this question is for the COVID exemption email. (April 28)
- Responded to email from Joel Alberts who plans to move to Hawai'i in August and wanted information on the quarantine. (April 28)
- Responded to email from Gary Humphlett asking to return a check-up phone call. Passed his information to the HVCB call center. (April 28)
- Responded to email from Dan Ramos asking on behalf of a friend who is having trouble getting a refund from a vacation rental on Maui. (April 28)
- Responded to email from Ola Shaw making a sales pitch for a new attraction on Maui. Told him to check back later since all of HTA's efforts are focused on the COVID-19 situation. (April 29)
- Responded to an email from Marie Turner of Blue Hawai'i Photo Tours complaining about the hostility towards visitors. (April 29)
- Responded to an email from David Reiner asking if the quarantine will be lifted on May 31. (April 29)
- Provided Bobbie Okamoto of HVCB with talking points and guidance regarding some questions received by the HVCB call center. (April 29)
- Responded to email from DL Sawyers asking about charging a fee for trails, and the tourism policy addressing management of island resources. Forwarded to Kalani Ka'anā'anā, and also suggested she reach out to DLNR. (April 29)
- Responded to email from Sen. Wakai asking for the link to the quarantine travel exemption email. (April 30)

- Responded to email from Daryl Fujiwara, organizer of the Hawaiian Airlines May Day 2020 TV broadcast, asking HTA to host a watch party on Facebook. (April 30)
- Responded to email from Bill Bentley asking when the quarantine will be lifted. (April 30)
- Responded to email from Brian Foote asking if the quarantine will be lifted by June. (April 30)

Monthly Follower and Engagement Statistics on HTA's Facebook Page

Number of followers from April 2019 vs. April 2020: **+28.99%**

- April 30, 2019: 10,634
- April 30, 2020: 13,717

Engagement rate from April 2019 vs. April 2020: **+10,854.39%**

- April 2019: 296 daily page engaged users
- April 2020: 32,425 daily page engaged users

Social Media Posts on HTA's Facebook Page

- April 1: Post sharing Hawai'i Foodbank's story on HTA supporting the Private Security Group to monitor their warehouse after recent break-ins occurred. **Total Reach 743 | Total Reactions 79**
- April 1: Post on the Food-a-go-go initiative. **Total Reach 548 | Total Reactions 51**
- April 1: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach 904 | Total Reactions 63**
- April 1: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates on COVID-19. **Total Reach 717 | Total Reactions 27**
- April 2: Post sharing Governor David Ige's Facebook Live Community Connection with Dr. Sarah Park. **Total Reach 700 | Total Reactions 32**
- April 2: Post sharing KHON2 News' live video of Mayor Kirk Caldwell's press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 1,069 | Total Reactions 86**
- April 2: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 749 | Total Reactions 30**
- April 2: Post sharing Pop-Up Mākeke's announcement of its online store in partnership with HTA. **Total Reach 255 | Total Reactions 16**
- April 2: Post sharing Pop-Up Mākeke's Facebook Live initiative to support small businesses via an online marketplace. **Total Reach 579 | Total Reactions 25**
- April 3: Post sharing meeting announcement of the Senate Special Committee on COVID-19. **Total Reach 825 | Total Reactions 31**

- April 3: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach** 937 | **Total Reactions** 94
- April 3: Post sharing KHON2 News' live video of Governor David Ige's press conference in response to COVID-19. **Total Reach** 475 | **Total Reactions** 30
- April 3: Post sharing Hawai'i News Now's article on the Hotel for Heroes program. **Total Reach** 1,026 | **Total Reactions** 136
- April 4: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates on COVID-19. **Total Reach** 920 | **Total Reactions** 52
- April 6: Post sharing Hawai'i House of Representative's announcement of an informational briefing of the House Select Committee on COVID-19 Economic and Financial Preparedness. **Total Reach** 893 | **Total Reactions** 52
- April 6: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach** 1,010 | **Total Reactions** 82
- April 6: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach** 611 | **Total Reactions** 22
- April 6: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates on COVID-19. **Total Reach** 995 | **Total Reactions** 49
- April 7: Post sharing KHON2 News' live video of Mayor Kirk Caldwell's press conference on the City and County of Honolulu's response to COVID-19. **Total Reach** 1,023 | **Total Reactions** 99
- April 7: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach** 943 | **Total Reactions** 49
- April 7: Post sharing Governor David Ige's Facebook Live Community Connection with Dennis Ling and Gwen Yamamoto Lau from DBEDT. **Total Reach** 889 | **Total Reactions** 55
- April 8: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach** 838 | **Total Reactions** 41
- April 8: Post sharing Pop-Up Mākeke's Facebook Live sharing their favorite games and treats available online. **Total Reach** 561 | **Total Reactions** 11
- April 9: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach** 783 | **Total Reactions** 24
- April 9: Post sharing KHON2 News' live video of Mayor Kirk Caldwell's press conference on the City and County of Honolulu's response to COVID-19. **Total Reach** 1,083 | **Total Reactions** 107

- April 9: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 560 | Total Reactions 18**
- April 9: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 912 | Total Reactions 63**
- April 9: Post sharing GoHawaii's video on sharing aloha while staying apart. **Total Reach 1,225 | Total Reactions 232**
- April 10: Post sharing County of Kauai's Facebook Live of Mayor Derek Kawakami sharing the latest updates on COVID-19. **Total Reach 920 | Total Reactions 32**
- April 10: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach 1,225 | Total Reactions 97**
- April 10: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 934 | Total Reactions 25**
- April 13: Post sharing Hawaii House of Representative's announcement of an informational briefing of the House Select Committee on COVID-19 Economic and Financial Preparedness. **Total Reach 849 | Total Reactions 76**
- April 13: Post sharing Honolulu Star-Advertiser's Facebook Live with Governor David Ige to join the COVID-19 Care Conversation. **Total Reach 767 | Total Reactions 64**
- April 13: Post sharing County of Kauai's Facebook Live of Mayor Derek Kawakami sharing the latest updates on COVID-19. **Total Reach 834 | Total Reactions 43**
- April 13: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 1,580 | Total Reactions 140**
- April 14: Post sharing Governor David Ige's Facebook Live Community Connection with Pankaj Bhanot, DHS Director for COVID-19. **Total Reach 1,920 | Total Reactions 215**
- April 14: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 1,131 | Total Reactions 88**
- April 14: Post sharing County of Kauai's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 726 | Total Reactions 42**
- April 14: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach 1,386 | Total Reactions 64**
- April 14: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 1,100 | Total Reactions 33**

- April 14: Post on GoFarm Hawai'i's food and farmer resources available. **Total Reach** 1,127 | **Total Reactions** 177
- April 15: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach** 693 | **Total Reactions** 29
- April 15: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach** 1,357 | **Total Reactions** 88
- April 15: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach** 977 | **Total Reactions** 27
- April 16: Post sharing Governor David Ige's Facebook Live Community Connection with Dr. Steven Hankins, lead for the Emergency Support Function/Public Health and Medical Services for COVID-19. **Total Reach** 367 | **Total Reactions** 18
- April 16: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach** 573 | **Total Reactions** 11
- April 16: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach** 1,001 | **Total Reactions** 80
- April 17: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach** 860 | **Total Reactions** 61
- April 18: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach** 535 | **Total Reactions** 40
- April 19: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach** 858 | **Total Reactions** 51
- April 19: Post sharing James Campbell High School's performance of a rendition. **Total Reach** 903 | **Total Reactions** 52
- April 19: Post sharing County of Maui's letter of request to the Governor's Office to allow exercise activity on beaches. **Total Reach** 1,203 | **Total Reactions** 168
- April 20: Post sharing Hawai'i House of Representative's announcement of an informational briefing of the House Select Committee on COVID-19 Economic and Financial Preparedness. **Total Reach** 803 | **Total Reactions** 42
- April 20: Post sharing Honolulu Star-Advertiser's Facebook Live with Governor David Ige and Dr. Darragh O'Carroll to join the COVID-19 Care Conversation. **Total Reach** 287 | **Total Reactions** 2
- April 20: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach** 898 | **Total Reactions** 70

- April 20: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach** 959 | **Total Reactions** 112
- April 21: Post sharing KHON2 News' live video of Mayor Kirk Caldwell's press conference on the City and County of Honolulu's response to COVID-19. **Total Reach** 1,191 | **Total Reactions** 154
- April 21: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach** 940 | **Total Reactions** 72
- April 21: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach** 667 | **Total Reactions** 44
- April 21: Post sharing Hawai'i Convention Center's announcement on its ballrooms being used as a temporary satellite location for the Hawai'i DLIR to process unemployment insurance claims. **Total Reach** 867 | **Total Reactions** 119
- April 21: Post sharing Kāhuli Leo Le'a's broadcast announcement of Hawaiian Airlines May Day 2020: Aloha 'Āina, which HTA sponsored. **Total Reach** 613 | **Total Reactions** 21
- April 22: Post sharing Governor David Ige's announcement of the Community Connection to be held with Scott Murakami, DLIR Director. **Total Reach** 611 | **Total Reactions** 32
- April 22: Post sharing Governor David Ige's Facebook Live Community Connection with Scott Murakami, DLIR Director. **Total Reach** 1,103 | **Total Reactions** 121
- April 22: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates on COVID-19. **Total Reach** 838 | **Total Reactions** 44
- April 22: Post sharing Governor David Ige's Facebook Live with Scott Murakami, DLIR Director to answer questions about unemployment claims. **Total Reach** 998 | **Total Reactions** 75
- April 22: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach** 584 | **Total Reactions** 10
- April 23: Post sharing Governor David Ige's Facebook Live Community Connection with Scott Morishige, Governor's Coordinator on Homelessness and Edward Mersereau, Deputy Director for Behavioral Health Administration. **Total Reach** 797 | **Total Reactions** 48
- April 23: Post sharing KHON2 News' live video of Mayor Kirk Caldwell's press conference on the City and County of Honolulu's response to COVID-19. **Total Reach** 1,103 | **Total Reactions** 82

- April 23: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 1,343 | Total Reactions 153**
- April 23: Post sharing Hawai'i Convention Center's announcement on using the center as a temporary satellite location for the Hawai'i DLIR to process unemployment insurance claims. **Total Reach 809 | Total Reactions 46**
- April 24: Post sharing meeting announcement of the Senate Special Committee on COVID-19 to meet with various departments including HTA. **Total Reach 816 | Total Reactions 63**
- April 24: Post sharing KHON2 News' live video of Mayor Kirk Caldwell's press conference announcing a food assistance program. **Total Reach 823 | Total Reactions 49**
- April 24: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 704 | Total Reactions 9**
- April 25: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates on COVID-19. **Total Reach 810 | Total Reactions 64**
- April 25: Post sharing Governor David Ige's announcement of a news conference to be held. **Total Reach 612 | Total Reactions 13**
- April 25: Post sharing Governor David Ige's Facebook Live press conference announcing his 6th Supplementary Emergency Proclamation. **Total Reach 1,578 | Total Reactions 125**
- April 26: Post sharing KHON2 News announcement of the "Stay Home Now, Aloha Later" relief fund initiative. **Total Reach 775 | Total Reactions 62**
- April 26: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates on COVID-19. **Total Reach 1,006 | Total Reactions 51**
- April 27: Post sharing Hawai'i House of Representative's announcement of an informational briefing of the House Select Committee on COVID-19 Economic and Financial Preparedness. **Total Reach 647 | Total Reactions 20**
- April 27: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates on COVID-19. **Total Reach 776 | Total Reactions 45**
- April 27: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 650 | Total Reactions 33**
- April 27: Post sharing Governor David Ige's Facebook Live announcing florist operations. **Total Reach 977 | Total Reactions 65**
- April 28: Post sharing meeting announcement of the Senate Special Committee on COVID-19. **Total Reach 716 | Total Reactions 41**

- April 28: Post sharing KHON2 News' live video of Mayor Kirk Caldwell's press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 1,078 | Total Reactions 91**
- April 28: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates on COVID-19. **Total Reach 675 | Total Reactions 33**
- April 28: Post sharing Mayor Kirk Caldwell's Facebook Live of press conference on the City and County of Honolulu's testing efforts and proposed plan to re-open certain businesses. **Total Reach 803 | Total Reactions 66**
- April 28: Post sharing Hawai'i Department of Transportation's passenger verification process at Hawai'i airports. **Total Reach 2,559 | Total Reactions 1,450**
- April 28: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 778 | Total Reactions 18**
- April 29: Post sharing Hawaiian Airlines' announcement of Hawaiian Airlines May Day 2020: Aloha 'Āina, which HTA sponsored. **Total Reach 588 | Total Reactions 54**
- April 29: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates on COVID-19. **Total Reach 1,214 | Total Reactions 139**
- April 29: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach 1,140 | Total Reactions 105**
- April 29: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 929 | Total Reactions 63**
- April 29: Post sharing Kāhuli Leo Le'a's video feature of Hawaiian Airlines May Day 2020: Aloha 'Āina, which HTA sponsored. **Total Reach 592 | Total Reactions 34**
- April 29: Post sharing Kāhuli Leo Le'a's announcement of Hawaiian Airlines May Day 2020: Aloha 'Āina, which HTA sponsored. **Total Reach 794 | Total Reactions 48**
- April 30: Post sharing meeting announcement of the Senate Special Committee on COVID-19 to meet with various departments including HTA. **Total Reach 393 | Total Reactions 24**
- April 30: Post sharing Governor David Ige's Facebook Live Community Connection with Alan Oshima. **Total Reach 1,282 | Total Reactions 84**
- April 30: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 713 | Total Reactions 17**

Monthly Followers and Engagement Statistics on HTA's Instagram Page

Number of followers from April 2019 – April 2020: **+44.64%**

- April 30, 2019: 2,099
- April 30, 2020: 3,036

Engagement rate for April 2019 vs. April 2020 cannot be compared due to no posts in April 2019.

Social Media Posts on HTA's Instagram Page

- April 14: Post on GoFarm Hawaii's food and farmer resources. **Total Reactions 62**
- April 29: Post on Hawaiian Airlines May Day 2020: Aloha 'Āina, which HTA sponsored. **Total Reactions 48**

Monthly Followers and Engagement Statistics on HTA's Twitter Page

Number of followers from April 2019 – April 2020: **+1.73%**

- April 30, 2019: 36,187
- April 30, 2020: 36,813

Engagement rate for April 2019 vs. April 2020 cannot be compared due to no tweets in April 2019.

Social Media Posts on HTA's Twitter Page

- April 14: Post on GoFarm Hawaii's food and farmer resources.

Internal Communications

- Gave talking points to Kristen Andres (KA) regarding a question from a visitor who says they were being unfairly evicted from their timeshare, Club Wyndham Kona, because the hotel was closing. (April 2)
- DBEDT: Responded to email from Charlene Chan regarding her ideas for Hotels for Heroes. (April 2)
- DBEDT: Responded to request from Charlene Chan regarding the process for getting the interisland passenger count. Explained what HTA's role is — that once the interisland declaration forms are handed over from the DOT, HTA scans them in then gives the data to DBEDT to process. (April 2)
- Edited Chris Tatum's (CT) new letter to the HTA board members. (April 2)
- CT participated in Gov Ige's press conference to talk about Hotels for Heroes. (April 3)
- Compiled talking points and possible questions for CT. (April 3)
- Gave speaking points to KA regarding a question about health care workers who want a room through Hotels for Heroes. (April 6)
- Gave talking points to KA to respond to an email inquiry from Kawika Beauchamp. (April 8)

- Responded to email from Jessica Lani Rich of VASH, saying her assistant was verbally attacked, with the message aimed at Jessica because VASH is helping to send the homeless passengers without lodging back to the mainland. Told her to file a police report. (April 9)
- Gave KA talking points to respond to an inquiry from Kazuhito Inakoshi regarding a question about visitor arrivals. (April 10)
- Gave Caroline Anderson DOH contact information in response to an email from Edgar Palafox regarding antibody tests. (April 13)
- Gave Darlene Morikawa of HVCB talking points regarding a response to emails about refunds, etc. (April 14)
- Finalized new letter from CT to the HTA Board of Directors regarding what HTA staff has been doing surrounding COVID-19. (April 15)
- Created timeline of COVID-19 events per CT's request. (April 17)
- Sent Anda Garel (AG) talking points in response to several emails to info@gohta.net. (April 17)
- Gave AG talking points to respond to an email from Linda and Angela asking for help in getting a refund from Vacation Candy. (April 20)
- Gave AG talking points to respond to an email from Damian Moskovitz asking about the quarantine. (April 20)
- Contacted DOE communications director Lindsay Chambers upon CT's request to help possibly fund a singing competition among the students. (April 20)
- Gave AG talking points regarding two calls she received from incoming travelers Diane and Lillian. (April 21)
- Gave talking points to AG regarding an email from Vincente Germann wanting documentation on when his quarantine ends. (April 21)
- Provided AG with the link to the interisland declaration form in response to an email from Maui resident Michael. (April 21)
- Drafted detailed information for the JIC on the arrival process at the airport, from the time someone lands to the end of the quarantine. Also sent to the email update list. (April 22)
- Gave AG talking points regarding vacation rentals in response to an email from Libby Leonard. (April 22)
- CT had WebEx meeting with DOE communications director Lindsay Chambersto discuss possible funding for a DOE online event. (April 22)

- Gave AG talking points in response to an email from Donald McDiarmid asking about where visitors can stay. (April 22)
- Gave AG talking points in response to an email from David Levine asking if it's ok if their friend stays in their condo. (April 23)
- Gave AG talking points in response to an email from Ryan Jarrendt who plans to move to O'ahu with his girlfriend for a new job this summer after graduating. (April 23)
- Gave AG talking points regarding an email from Catherine Espita asking for a refund from the GoWaikiki shuttle. (April 24)
- Gave AG talking points in response to an email from Alan Pearce, who said he has fallen on hard times and wants to be reimbursed for his plane ticket back to the mainland. (April 24)
- Sent CT's new letter to Mufi Hannemann of HLTA and John Monahan of HVCB to distribute. (April 27)
- Sent AG talking points in response to an email from John Grubor asking for help in getting a refund from the timeshare owner he rented a room through on Kaua'i. (April 27)
- Gave AG talking points regarding an email from Adam Frey asking for an exemption. Sent her the link. (April 27)
- Gave AG talking points in response to an email from Paulette Tam, asking how many visitors left Hawai'i in March and April. Told her HTA doesn't keep track of that data. (April 27)
- Gave AG talking points in response to an email from Erik Soderholm asking Mufi Hannemann to stop using the word "visitors" for arrivals. Advised her to tell him that if they are not residents then they are classified as visitors, and the definition of a visitor according to Dictionary.com. (April 27)
- Gave AG talking points in response to an email from Chelsey Germani regarding the rules for future residents. Told her that intended residents are not exempt from the quarantine order. (April 27)
- Gave AG talking points in response to an email from Nicholas McKiernan, who just moved from Michigan to Kona, asking if they can move their place of lodging. (April 27)
- Gave AG talking points in response to an email from Tanya Rhodes regarding how long the quarantine period will go through. (April 27)
- Gave AG talking points in response to an email from Mahealani Cypher asking if any of the residents are snowbirds. Sent her information on how passengers are classified. (April 27)

- Gave AG talking points in response to a call from Jen Inamoto asking if their workers can go between the islands without doing the quarantine. Told her to provide the exemption email address. (April 28)
- Gave talking points to AG regarding the operational status of Hale Maluhia CountryInn in regards to getting a refund. (April 28)
- Gave AG talking points in response to an email from Bob Gonzalez asking about the quarantine if they come to Hawai'i in May. (April 28)
- Gave AG talking points regarding an email from Katie Cassel asking why a flight that her daughter was on wasn't listed on HTA's press release. Advised her that HTA's data doesn't include interisland flights. (April 28)
- Gave talking points to AG in response to an email from Stephen DiRico asking HTA to force a special flight from the Philippines. (April 28)
- Gave AG talking points regarding an email from Ronda Hoxsie asking about the enhanced screening process. (April 28)
- Gave AG talking points in response to email from Jeni Crump complaining about the returning residents not following the quarantine order. (April 30)
- Gave talking points to AG in response to email from Donald McDiarmid asking how many visitors are staying in hotels in comparison to vacation rentals. (April 30)
- Gave talking points to AG in response to email from H. Le Phan asking about the Marriott Ko Olina. (April 30)

International News Bureau and Other Inquiries

- Germany: Responded to email from Henrik Richter-Alten regarding his layover in Hawai'i. Told him if he doesn't leave the airport he will be a transit passenger and won't need to quarantine. (April 3)
- Italy: Responded to email from future visitor Giovanni Lanzo, wondering if they should cancel their trip scheduled for August. Told him there's no way to know what the situation will be like in August but to keep checking HTA's website for updates. (April 5)
- Austria: Responded to email from Erich Schmidt asking about comparing his photos to the observatories on Maunakea so he can figure out their names. Referred him to the USGS website. (April 6)
- Denmark: Responded to email from future visitor Lars Hedegaard asking if its ok to come to Hawai'i in June. Explained the situation and to check for updates on HTA's website. (April 18)
- European Union: Responded to e-mail from Igor Špacapan regarding their upcoming vacation in June and if they will have to quarantine. Told him to check HTA's website for updates and sent a link to an article about the quarantine. (April 26)

4. Safety and Security

Visitor Assistance Program (VAP)

HTA currently has four contracts, one in each county, to provide funding support for the Visitor Assistance Program. These contracts are:

- **CON 17031** – Visitor Aloha Society of Hawai'i (O'ahu) with total funding of \$370,000 and a contract expiration date of 4/1/2021. The first payment of \$333,000 was processed on April 17, 2020. Due to the COVID-19 pandemic, an additional supplemental for an amount of \$25,000 with VASH O'ahu was made to fund a Flight Assistance Program to send travelers back home in order to stop the spread of COVID-19. This payment was processed on May 7, 2020.
- **CON 17032** – VASHI – Island of Hawai'i VAP with total funding of \$170,000 and a contract expiration date of 4/1/2021. The first payment of \$153,000 processed on April 17, 2020. Due to the COVID-19 pandemic, an additional supplemental for an amount of \$2,700 with VASHI was made to fund the making of fabric masks for industry partners in order to stop the spread of COVID-19.
- **CON 17034** – MVCB – Maui VAP with total funding of \$55,000 and a contract expiration date of 4/1/2021. The first payment of the amount \$49,500 was processed on May 6, 2020.
- **CON 17033** – VASK – Kaua'i VAP with total funding of \$55,000 and a contract expiration date of 4/1/2021. The first payment of the amount \$49,500 was processed on May 6, 2020.

During the month of March:

- Maui County's program handled 15 cases and helped 25 visitors (year-to-date: 57 cases/107 visitors).
- Hawai'i County's program handled 21 cases and provided assistance to 47 visitors (year-to-date: 135 cases/197 visitors).
- City and County of Honolulu's program handled 58 cases and helped 126 visitors (year-to-date: 200 cases/451 visitors).
- Kaua'i County's program handled 3 cases and provided assistance to 9 visitors (year- to-date: 8 cases/25 visitors).

During the month of April:

- Maui County's program handled 2 cases and helped 2 visitors (year-to-date: 59 cases/109 visitors).
- Hawai'i County's program handled 6 cases and provided assistance to 9 visitors (year-to-date: 141 cases/206 visitors).
- City and County of Honolulu's program handled 70 cases and helped 105 visitors (year-to-date: 270 cases/556 visitors).
- Kaua'i County's program handled 3 cases and provided assistance to 9 visitors (year- to-date: 11 cases/34 visitors).

Lifeguard Support Program

During Fiscal Year 2019, HTA supported the four counties with funding of \$125,000.00, with one-for-one match, for the purpose of purchasing ocean safety equipment. The Kaua'i Lifeguard Association utilized 100% of the available funding of \$125,000.00. The City and County of Honolulu also utilized all of the \$125,000.00 funds. Maui County utilized \$124,734.61 of \$125,000.00. Due to challenges, Hawai'i County did not use any of the \$125,000.00 funds allocated to them and a contract extension was at this time not performed. The Fiscal Year 2020 agreements for three of the four counties were executed with the dollar amounts remaining the same (\$125,000.00 each) and the match was eliminated to facilitate the acquisition of critical rescue equipment. However, due to the COVID-19 crisis, the contracts have been rescinded as funds for these programs are no longer available. Once HTA returns to normal funding levels, we will revisit these programs and hopefully be able to fund them again in the future.

Waikīkī Camera Program

MOA 19010, which provided the City and County of Honolulu with \$300,000 in funding to purchase security cameras in Waikīkī, was executed and extended on 12/30/19 through a no-cost supplemental agreement. HTA has paid \$270,000.00 towards this project and made the final invoice payment of \$30,000 on April 24, 2020.

Ocean Safety Advertising Campaign

HTA, through its contracts with SKYHI MEDIA (CON 18176 S1 - \$108,376.92) and Pacific Media Group (CON 18189 S2 - \$143,006.60), is supporting the displaying of ocean safety videos at airports throughout Hawai'i. These videos run primarily in the baggage claim areas during normal airport operating hours. Both contracts will expire on 6/30/2020 and the agreements were originally planned to be extended to continue showing these videos in Fiscal Year 2020, however due to the COVID-19 pandemic, an extension will no longer be possible as funds for these programs are no longer available. Once HTA returns to normal funding levels, we will revisit these programs and hopefully be able to fund them again in the future. Payment for both contracts have been made up to March 2020.

Snorkel Safety Study

HTA has executed a contract (CON 19171) with the Hawaiian Lifeguard Association (HLA) for \$131,000 to conduct a snorkel safety study with an expiration date of 6/30/2021. The purpose of this two-year study is to formally assess the causes and risk factors in snorkel-related fatalities and near fatal drownings. HLA will collect and analyze data, conduct scientific research, conduct surveys and interviews, and consult with experts in the appropriate fields. The State of Hawai'i Department of Health and the City and County of Honolulu lifeguards are collaborating on the study. HLA has collected information on the cases of snorkeling-related accidents. The second of three payments have been issued. HTA is waiting for the final report and invoice (\$31,000.00), which is due per the contract in April 2021.

Hā'ena Emergency Support

MOAs have been executed with DLNR for \$54,860 and with the Kaua'i Police Department (KPD) for \$41,140 providing officers to support the enforcement of the "no parking" zone along a two-mile stretch of Kūhiō Highway. KPD has been submitting requests for reimbursement. DLNR has not submitted requests for reimbursement to date. Both agreements expire on 5/31/20.

Ho'okaulike

Honolulu Parks Security Cameras - MOA 19194

HTA partnered with the City and County of Honolulu's Department of Parks and Recreation to provide funding of \$204,000 for the installation of 192 surveillance cameras in 13 parks. The MOA has been fully executed, and the work is underway. HTA received and processed the first invoice on September 9, 2019 for \$183,600.00 as per the agreement. Parks and Recreation will provide updates as they move forward. The MOA will expire December 31, 2020.

Hawai'i Island Strategic Plan

MOA 19157 with the County of Hawai'i (\$35,000) was executed to assist in the update of the Hawai'i Island Tourism Strategic Plan (2001-2015). HTA has been working closely with County staff to receive updates on the status of this project. An extension to MOA 19157 has been made, with the new end date of June 30, 2020. The first payment of \$31,500 was processed on April 17, 2020. The final payment of \$3,500 is expected from the vendor in July 2020.

Maui Coral Reef Signage

CON 19169 was fully executed with the Maui Marine Resource Council for \$47,144 and set to expire on December 31, 2019. The contractor has been working to replace existing signs and create new signs related to the coral reef on Maui. The sign design is being reviewed by the Maui Visitors and Convention Bureau (MVCB) for final approval. Once reviewed and approved by MVCB, they will send it to HTA for final approval. It is estimated that printing and shipping will take 4-6 weeks once finalized.

Additionally, the contractor is working with the County on acquiring the necessary permits, including an SMA assessment (possibly a minor SMA permit) and obtaining right of entry to the County park sites, which is contingent on approval of the SMA permit. The contractor requested an additional extension of six additional months beyond the first extension (6/30/20), due to the time required to work through the County process. The additional extension request was received by the HTA and a no-cost extension contract was executed on 5/4/20 with new contract end date being 12/31/20.

COVID-19 Related Projects & Support

Airport Screening:

Since March 26, 2020, the HTA has been providing support to the Department of Transportation – Airports Division by contracting with companies that have “badged” employees to carry out the screening processes at the arrival gates. These companies include Roberts Hawaii, OmniTrak, Anthology, and Worldwide Flight Services. We have been providing support in Honolulu, Kahului, and Kona Airports.

Passenger Form Scanning:

Since March 26, 2020, the HTA has been scanning documents at the Daniel K. Inouye International Airport in Honolulu. This has been done in partnership with SMS and the DOT-Airports Division. We were provided a room at the airport and our vendor, SMS, was able to relocate their scanning equipment and personnel to this location in support of this mission. Forms are collected from arriving flights and scanned into a database. The data is then utilized to support the HTA's call center operations and serves as a critical link to our enforcement partners tasked with enforcing the self-quarantine order. Neighbor island forms are collected on a daily basis and sent to Honolulu for processing.

Call Center:

Since March 26, 2020, the HTA has been supporting the operation of a call center. The call center, originally, was established to contact arriving visitors as part of the State’s efforts related to the self-quarantine order. The HTA reached out to HVCB for assistance and HVCB has been taking the lead in managing the day-to-day activities of the call center. Special thanks to Barbara Okamoto (Bobbie) for her assistance with this important project. As of May, there are more than 85 individuals trained to make calls 7 days a week.

The HTA, thanks to the hard work of Kalani Kaanaana, is utilizing a cloud-based PBX system (Grasshopper) to allow call agents to connect and makes calls using their own phones routed through the PBX system. This has meant that we do not have to provide equipment. The data is provided to the call center agents using Microsoft Teams. Jen Chun has played a critical role in assisting us in getting the data into a format that makes sense and is usable by our agents.

In late April, it was determined that returning residents should also be included in the contact activities of the call center. On April 24, 2020, the Department of Transportation began assisting the HTA with this process by making calls to residents and providing more than 20 call center agents to support the process

Call Center Metrics:

	Voice Mails / Calls / Ratio	Hangups / Calls / Ratio	Faxes / Calls / Ratio	Voice calls / Calls / Ratio
May	1838/23864/8%	2167/23864/9%	1/23864/0%	19824/23864/83%
April	550/12868/4%	912/12868/7%	0/12868/0%	11404/12868/89%
March	21/269/8%	42/269/16%	0/269/0%	205/269/76%

	Inbound Minutes	Outbound Minutes	Total Minutes	Avg. Call Length
May	45344:14	34397:40	79741:54	1:47
April	24062:05	19019:58	43082:03	1:46
March	367:25:00	245:34:00	612:59:00	1:16

Other Related Projects:

There are numerous other projects that the HTA is involved in including the support of the Safe Travels application’s first phase, the ESRI/ArcGIS database enhancement and others.

IV. BRAND MARKETING PILLAR

MMA Contracts

Due to the COVID-19 pandemic, 2020 contracts for Europe and Southeast Asia markets have been cancelled, effective April 17, 2020. On April 9, RFP 21-04 Europe MMA was cancelled due to changing fiscal priorities in response to the COVID-19 crisis. RFP 21-05 Oceania MMA remains in effect with proposal submission due on May 29, 2020.

MMA Marketing Plans

The Market Management team is ensuring that the focus of “Responsible Tourism” is thread through the marketing plans from HTA’s Global Marketing Team (GMT). This action runs parallel to HTA’s brand marketing, and thus Hawai’i will be set up well to welcome the next generation of travelers who are already conscious of and respect destinations that care for their natural resources. The team has updated the Brand Management Plan (BMP) templates and GMT BMPs for 2021 are due to HTA on June 30, 2020.

From mid-March through April, Hawai’i was impacted by the 14-day quarantine for all incoming passengers, and the stay-at-home orders due to the COVID-19 global pandemic. As a result, HTA instructed its GMT partners to stay dark. All advertising initiatives have been halted. As the stay-at-home order increases globally, the GMTs increased the opportunity for educational webinars and other interactive training about each island’s treasures and Hawai’i overall.

HTA staff also worked with the GMTs to receive information on the development of how each country was dealing with and adapting through the coronavirus spread. HTA conducted conference calls with the airlines, including Hawaiian Airlines, Alaska Airlines, Japan Airlines, All Nippon Airways, Qantas, Southwest Airlines, WestJet, Air Canada and Air New Zealand, to discuss their plans and start-up strategy with continual safety protocol top-of-mind, from on-boarding, to during the flight and during the off-boarding process.

Industry Partners Meetings

The HTA Marketing team held meetings with industry partners over two days in February. In attendance were representatives from various hotels, airlines, wholesalers, land operators, transportation companies, and event creation companies. The discussions included topics such as responsible tourism, sustainability, single-use plastic, HTA’s four pillars, key marketing objectives, brand positioning, key performance indicators and resources on HTA’s web site. The meetings gave the marketing team an opportunity to understand Hawai’i’s industry partner needs and how we can work together and assist them and each other. As the meetings were well received, we plan to have additional meetings quarterly.

Due to COVID-19, the 2nd quarter Industry Partner Meeting has been postponed. However, HTA continues to communicate with its industry partners by providing COVID-19 related information daily.

China Summit

Due to the global COVID-19 situation, HTA’s China Summit has been postponed.

GMT Hawai’i Coalition

The GMT Hawai’i Coalition meeting between all GMTs, Island Chapter representatives and HTA has been canceled due to the global COVID-19 situation.

Communication

There have been concerns regarding the impact of tourism due to COVID-19. HTA has been communicating with its industry partners, providing up-to-date information from the Department of Health, all press conferences, arrivals and other data during this fluid time.

As the 14-day quarantine and stay-at-home orders were instituted, HTA's message evolved to, "this is not the time to travel" in order to protect Hawai'i's residents and prevent the spread of COVID-19. This message became stronger with the closure of hotels, parks, beaches and activities. Presently the 14-day quarantine and stay-at-home orders are in effect through May 31, 2020.

HTA has a committee called MĀLAMA with primary discussions focused on a recovery plan with the most important voice being the residents.

V. TOURISM RESEARCH

The Tourism Research Division (TRD) issued the March 2020 monthly visitor statistics on April 30, 2020, including monthly arrivals by country, category expenditures for major markets, and monthly visitor characteristics for each major market area.

TRD posted Seat Outlook data tables for May 2020 through July 2020 to the Infrastructure Research Section of the HTA website.

State, major market and island fact sheets were updated with the March 2020 data and posted to the Board site. State and market fact sheets were published on the website.

TRD issued the March 2020 Hawai'i Hotel Performance Report on April 30, 2020. The report and related March 2020 data tables were posted to the Infrastructure Research section of the HTA website. The Hawai'i Hotel Performance Report is produced using hotel survey data compiled by STR, Inc., the largest survey of its kind in Hawai'i.

TRD continued to work with the State Attorney General's office to analyze visitor data related to the impacts of the national travel ban on inbound travel from seven affected countries.

TRD assists with preparing the HTA Daily Tourism Brief which is posted on the COVID-19 (Novel Coronavirus) alert page on the HTA website.

TRD is assisting with the Mandatory 14-Day Quarantine, including daily cleaning, manual ascription, and tabulation of State of Hawai'i Department of Agriculture Plant and Animal Declaration Form (Ag Form) data; managing the scanning of forms at Daniel K. Inouye International Airport (HNL); scanning and organizing the Order for Self-Quarantine; supporting calls to visitors, intended residents, and visitors; supporting DBEDT's tabulation of Interisland Declaration Form data; supporting escalations to law enforcement; and providing traveler information to the counties and HI-EMA.

TRD continues to reply to requests for information from HTA's Global Marketing Team, industry, media, and the general public. Data requests completed include:

- Additional detailed visitor statistic data for UHERO and DBEDT/READ for their databases, and the monthly data requests
- Research inquiries routed through DBEDT

VI. ADMINISTRATIVE

Contracts List

A list of contracts executed in the month of March, April and May is attached.

Hawai'i Visitors & Convention Bureau (USA) 2020 Monthly Leisure Marketing Report – March/April

Market Intelligence/Market Conditions

The coronavirus pandemic continues to evolve into a worldwide socio-economic crisis. Comerica Bank U.S. Economic Outlook data released in the last week of April shows the economy slipping into recession in the first quarter of this year. Further, the data remains consistent with widely held expectations of a historically weak second quarter. April U.S. forecast shows an unprecedented -29 percent annualized rate of decline in Q2 real GDP, reflecting the economic drag of widespread social mitigation policies across the U.S.

Total job losses for April were more than double the losses during the Great Recession. Unlike the Great Recession, the job losses for April were mostly due to temporary social policy. But while many of the workers dropped from payrolls in April will be rehired by the end of this year, many others will not. Some businesses will fail while others will resume operations at a lower level of output. Some businesses will take steps to operate more efficiently with fewer workers.

- Unemployment rate for April: 14.7 percent, +10.3 percent increase from March.
- The Conference Board *Consumer Confidence Index* declined sharply in March, following an increase in February. The Index now stands at 86.9 (1985=100), down from 118.6 in March.
- The *Present Situation Index* – based on consumers' assessment of current business and labor market conditions – decreased from 166.7 to 76.4.
- The *Expectations Index* – based on consumers' short-term outlook for income, business and labor market conditions – improved from 86.8 last month to 93.8 this month.

“Consumer confidence weakened significantly in April, driven by a severe deterioration in current conditions,” said Lynn Franco, Senior Director of Economic Indicators at The Conference Board. “The 90-point drop in the Present Situation Index, the largest on record, reflects the sharp contraction in economic activity and surge in unemployment claims brought about by the COVID-19 crisis. Consumers' short-term expectations for the economy and labor market improved, likely prompted by the possibility that stay-at-home restrictions will loosen soon, along with a re-opening of the economy. However, consumers were less optimistic about their financial prospects and this could have repercussions for spending as the recovery takes hold. The uncertainty of the economic effects of COVID-19 will likely cause expectations to fluctuate in the months ahead.”

Outbound Travel Market

U.S. wholesalers are focusing on future sales and education. Most wholesalers are working on recovery plans that are currently more in the inspirational phase -- dream today/book tomorrow. Mexico and Caribbean booking interest are leading the way for Pleasant, but Hawai'i is not far behind with some bookings for 2020, although it is still too early to see a trend.

Competitive Environment

- The International Air Transport Association (IATA) has released its latest forecast. It predicts that half of all airline business will disappear this year, with full year passenger revenues falling -55 percent compared with 2019 and traffic falling -48 percent. CEO Alexandre de Juniac summed it up as “catastrophic”. Emphasizing the effect on the wider economy, de Juniac said, “If airlines lose one job, another 24 disappear somewhere in the value chain. That was behind our analysis last week when we said that some 25 million jobs are at risk.”
- Cruise Line Industry Association (CLIA) reported the suspension of cruise operations will have a pronounced detrimental effect on the global economy. The cruise industry generates more than \$150 billion per year in global economic activity and supports over 1.17 million jobs worldwide. Cruising touches almost every sector from transportation and agriculture to hospitality and tourism, manufacturing and beyond. When the time is right for cruise ships to once again set sail, our community will be an important part of the global economic and societal recovery.
- The Travel & Tourism sector faces a staggering 100 million jobs lost due to the coronavirus pandemic, according to the World Travel & Tourism Council (WTTC). The startling figure, based on research from WTTC, has increased by over +30 percent in the last four weeks, indicating the sheer crisis affecting the sector. The WTTC has alerted G20 Tourism Ministers to the extent of the crisis, as they gathered by virtual conference on May 5. Of the 100.8 million jobs at risk, almost 75 million of them are in G20 countries. WTTC analysis also shows a sharp escalation in the economic loss to the world economy, up to US\$2.7 trillion of GDP, from US\$2.1 trillion just a month ago. The impact of the COVID-19 crisis has led to over one million jobs already being lost every day.

Consumer Trends

- ***Travelers will focus on health, their own and others*** - Dr. Nabarun Dasgupta, an infectious disease epidemiologist at the University of North Carolina, says the pandemic will force consumers to factor health concerns into their travel choices even more than before. He recommends checking verified apps like *Outbreaks Near Me* to take proper precautions before traveling to a destination.

Media Trends

- ***User-generated content takes center stage*** - Brands like Walmart, Lowe’s, and UPS leverage user- and employee-generated content during one of the most critical moments in our lives. This is now the case as they cannot generate the kind of visual content they want to because everyone is stuck at home. People are getting tired of “branded content” and want more human, realistic visual content that is unfiltered.
- ***The social network of the future might not be a social network at all*** - Two of the hottest “social” platforms right now are certainly not traditional social media networks. The first one, *Zoom*, probably is not a social platform at all, but it gets at the essence of everything social media was at one time. It is real. It is honest. It is human. Brands are trying to leverage it as a platform, e.g., Chipotle’s “Chipotle Together” *Zoom* chats. The second, *Twitch*, is the real up-and-comer, and this platform is not all about teen gamer boys just as *TikTok* is not just used by tween girls. The next big social networks may not be traditional social networks, at least not the way we know them now.

Airlift

- March 31, 2020 HTA Airline Seat Capacity Outlook for Second Quarter 2020. The forecast for scheduled nonstop air seats to Hawai'i in the second quarter of 2020 will decrease by -11.5 percent as compared with the same quarter of 2019. The projection is based on flights appearing in Diio Mi schedules as of March 2020. Due to the COVID-19 outbreak, the decrease in scheduled air seats is expected to occur in all major market areas including U.S. West (-3.2%) and U.S. East (-7%).

Market Intelligence/Market Conditions Impact on Hawai'i Travel

With the extension of Governor Ige's mandatory 14-day quarantine for air travel to Hawai'i through May 31, the impacts of COVID-19 will continue to affect travel to Hawai'i. In April, Hawai'i's visitor arrivals were typically between 100 and 200 each day. Already in the first few days of May, the counts have consistently been over 200 a day.

Activity Update

Travel Trade

- COVID-19 related activities:
 - Due to the COVID-19 pandemic, travel trade training events planned for the month of April were either cancelled or postponed. The team's roles have adapted to support key HTA initiatives, as well as to initiate projects in preparation for the time when Hawai'i re-opens to travelers.
 - HVCB's travel trade directors, manager and coordinator have been assisting with the HTA "Hotel Quarantine" calls and the HTA "Hotels for Heroes" initiative.
 - Communications were distributed and phone calls were made direct to all wholesale and consortia partners regarding the 14-day quarantine.
 - Conducted audit to ensure quarantine messages are visible on all wholesale partner websites.
 - HVCB is working with NorthStar on ways to incorporate new, relevant safety information into online education content.
- Other activities
 - Initiated a database cleanse with TA Connect to ensure contacts are up to date.
 - The travel trade team is updating the Hawai'i Destination Specialist (HDS) live workshop presentation and workbooks.

Public Relations

- HVCB
 - Amidst the uncertainty ushered forth by COVID-19, HVCB's PR team drafted and disseminated a notice to U.S. travel trade professionals, leisure publications, editors and freelance journalists requesting they refrain from publishing any stories about Hawai'i that might encourage people to travel to the islands. In addition, press trips and individual media visits have been postponed to responsibly ensure the safety of visitors and residents alike.
 - In an effort to support Hawai'i Governor David Ige's Emergency Rules Order, HVCB's PR team assisted with drafting and disseminating letters to select airlines and OTAs; communication details included the extension of this order through May 31, the restrictions and tracking mechanisms in place to enforce the order and a request for support from the airlines and OTAs to help mitigate non-essential travel to the islands.

- O’ahu was featured in the following April publications and websites:
 - *SmarterTravel* (267,412 uvpm). Coverage was a result of an OVB news release. Ashley Rossi’s story, “Spectacular Virtual Vacations You Can Take from Home,” features the Battleship Missouri Memorial, Polynesian Cultural Center and the 75th anniversary of the end of WWII.
- Maui was featured in the following March publications and websites:
 - *Forbes* (669,672 uvpm), “Five Ways to Bring the Spirit of Aloha into Your Home.”
 - *JohnnyJet* (uvpm 271,080:), “How to Have a Luau at Home.”

Sales Activities

	Airline	Wholesaler/TA/TO/OTA	Other
HVCB	-	14	-
KVB	-	-	-
OVB	-	4	-
MVCB	-	1	-
IHVB	-	-	-

- HVCB
 - For March, HVCB’s regional team conducted 11 educational training presentations and participated in three trade shows for a total of 14 sales activities. There were no one-on-one appointments, though the team had the opportunity to present to more than 455 advisors.
 - HVCB participated in Apple Leisure Group’s Hawai’i Dinners from Mar. 3-5 in Denver, CO; Bellevue, WA; and Portland, OR. The event included *lei* greeting, a trade show and a destination presentation. There were 30 advisors at each location. Hawai’i partners included Hawaiian Hotels & Resorts, Highgate Hotels and Outrigger Hotels & Resorts.
 - Ensemble Travel Group co-hosted a webinar with HVCB to encourage members to complete HVCB’s certification programs and new cultural webinar.
 - Destination training was conducted for new AAA travel advisors on Mar. 6 in Clackamas and Portland, OR. There were 10 travel advisors at each location.
 - HVCB partnered with Pleasant Holidays to conduct two Hawai’i Destination Seminar trainings on Mar. 4-5 in Orlando and Tampa, FL, for a total of 28 agents.
 - HVCB hosted the U.S. West Leisure Sales Blitz Mar. 9-11 in San Diego, Newport Beach and Burbank, CA. Kainoa Daines hosted a cultural workshop; Kumu Hula Kau’i Kanaka’ole hosted a cultural demonstration of *’ohe kapala* along with live Hawaiian music and *kahiko* and *’auana* performances. 142 advisors attended to meet with HVCB representatives, the Island Chapters and 24 suppliers for the trade show and presentations. Partners included Apple Leisure Group, Aqua-Aston, Atlantis, Battleship Missouri, Delta Vacations, Hawaiian Airlines, Hawaiian Hotels & Resorts, Highgate Hotels, Kā’anapali Beach Hotel, Kapohokine Adventures, Kōloa Landing Resort, Marriott, Maui Ocean Center, Maverick Helicopters, Outrigger, Pleasant Holidays, Polynesian Cultural Center, Residence Inn by Marriott O’ahu Kapolei, Sheraton Kaua’i Coconut Beach Resort, Shoreline Waikīkī and Coconut Hotels, Sightline Hospitality, Surfjack Hotel and UnCruise Adventures. The events scheduled for Mar. 12-13 in Sacramento and San Francisco were cancelled following San Francisco Mayor Breed and Governor Newsom asking for everyone to cancel “non-essential meetings” and social distancing in light of COVID-19.
 - HVCB reached 70 agents through a live webinar with Delta Vacations on Mar. 10.
 - There were 2,115 travel advisors who have taken one or more of the online educational modules at *agents.gohawaii.com* for the month of March. The February monthly metrics report showed a total of 1,095 online graduates having earned either their Hawai’i Destination Specialist or Island Specialist (Kaua’i, Maui Nui, O’ahu or island of Hawai’i) certification.

Responsible Tourism Update

Hawaiian Culture

- **#ShareAloha.** Due to COVID-19 concerns, no emails promoting travel to the islands were sent. Instead, one email was distributed to all active email subscribers (363,000) to **#ShareAloha** in their home communities while postponing a trip to the Hawaiian Islands.
 - Social media. **#ShareAloha** video launched on Apr. 8 and was supported with paid media through Apr. 21.

Natural Resources

- KVB sent information about access to Hā'ena to writer Devorah Lev-Tov for *The Points Guy*.

Community

- HVCB
 - **#ShareAloha.** Due to COVID-19 concerns, no emails promoting travel to the islands were sent. Instead, one email was distributed to all active email subscribers (363,000) to **#ShareAloha** in their home communities while postponing a trip to the Hawaiian Islands.
 - Social media. **#ShareAloha** video launched on Apr. 8 and was supported with paid media through Apr. 21.
 - Kama'āina Campaign. **#LiveAloha.** Launched and ran a local campaign throughout the month of April supporting the *aloha* spirit in our Hawai'i communities. The campaign included broadcast, print and social media messaging.
 - Broadcast television. 30-second PSA (public service ad) units were secured at no charge and aired on the following from Apr. 7-30: KHON (FOX), KITV (ABC), Hawai'i News Now (KGMB and KHNL), Spectrum Reach, KFIVE, KHII, NITV (METV), NHON-TV (CW).
 - Print newspaper. Full-page ad units were secured at no charge and ran in the following:
 - *Garden Island*: Apr. 8, 13, 20, 27
 - *Maui News*: Apr. 4, 18, 22, May 2
 - *Honolulu Star Advertiser*: Apr. 8, 13, 20, 27
 - *Hawai'i Tribune Herald*: Apr. 8, 13, 20, 27
 - *West Hawai'i Today*: Apr. 8, 13, 20, 27
 - Social media. **#LiveAloha** was supported with paid media from Apr. 9-22.
 - Mākeke Marketplace. In light of multiple events that have been cancelled, provided video production funding for a commercial highlighting local artisans/crafters.
 - All Island Chapters are assisting with the quarantine-related efforts from staffing the visitor hotline from 9:00 am-9:00 pm, collecting and forwarding agricultural forms and Orders for Self-Quarantine forms, and staffing the quarantine call team that is calling every visitor and intended resident arriving to monitor their adherence to quarantine stipulations.
- KVB
 - In response to the current pandemic, Executive Director Sue Kanoho has been working daily with the Kaua'i Emergency Management Agency Office in cooperation with the County of Kaua'i's Mayor and Mayor's office, Kaua'i Police Department and other state and county officials and organization. In addition, she chairs the Tourism Subcommittee for the Kaua'i Mayor's Economic Recovery Strategy team to assist in establishing a plan to reopen the island while keeping the community safe.
- IHVB
 - After receiving notification of cancellation of the 57th Merrie Monarch Festival on Mar. 12, IHVB assisted the Merrie Monarch Festival Committee with formally notifying support businesses, participating organizations, parade participants and those involved in the permitting processes.

Hawai'i Tourism Japan

2020 Monthly Leisure Marketing Report – March / April

Market Intelligence/Market Conditions

Economy

- The Japanese government announced that the economy has been worsening rapidly through April from the COVID-19 outbreak, utilizing the most pessimistic expression on its status in more than a decade since the 2009 global financial crisis in its key monthly report. For short-term prospects, the economy is expected to continue facing similar conditions due to the fallout of COVID-19 and warned of potential further downside risks.
- Government officials stated that automobile makers are expected to see a particularly sharp fall in production from slowing demand, supply chain disruptions and factory closures. Additionally, as consumers refrain from going out except for essential purposes, private consumption has been decreasing rapidly, greatly jeopardizing the overall economy. Experts predict the Japanese economy to shrink by up to 11% in Q2.

Outbound Travel Market

- Japanese outbound travelers declined by 85.9% to 272,700 in March from COVID-19 as leisure travel demand plummeted. With most destinations forming some sort of entry restriction, travel agencies were not able to carry out tours, resulting in the cancellation of all products. The Japanese Government's expansion of travel advisories to citizens also compounds to cause overall outbound travel to greatly decline.
- The Ministry of Foreign Affairs raised travel advisory levels to level 3, for countries and regions with high concern from travels on 3/31, along with raising levels to level 2 for the rest of the world. Other measures such as the temporary cease in issuance of new passports from 4/9 – 5/6 to limit the number of outbound travelers.
- The Japan Tourism Agency announced the allocation of travel industry recovery funds of over 1.7 trillion yen. However, these funds are planned to be utilized only for recovery of the domestic and inbound travel market. Travel agencies and airlines are making requests to the agency to allocate funds for use to revitalize the international travel market.

Competitive Environment

- Australian Minister for Trade, Tourism and Investment announced that due to uncertainties with COVID-19, there is potential for travel restrictions to not be fully lifted until the Christmas season. Although Australia has been relatively successful in containing COVID-19, he expressed that the travel restrictions played an essential role and stressed importance of its continued implementation.
- The Tourism Authority of Thailand worked with public and private sector partners to introduce the "Amazing Thailand Safety and Health Administration" to elevate the tourism industry standards and develop confidence in both domestic and international travelers.
- Marianas Visitors Authority launched their new "Mariana from Home" campaign from 4/15. As travels are asked to be refrained globally, consumers are being asked to provide ways to effectively

enjoy the Mariana Islands from their home on their SNS platforms. 200 participants will be rewarded with original goods and a suitcase.

- Brand USA announced the enhancement of contents on their “Go USA TV” app to allow for people to enjoy various attractions in the USA from their homes. Additionally, provincial tourism authorities such as New York and Las Vegas have begun sharing virtual contents on owned platforms.

Consumer Trends

- Japanese consumers are slightly more optimistic on the challenges presented by COVID-19 according to a survey study conducted by McCann Japan. While the pandemic is the greatest economic crisis in the post-war era, people’s moods seemed to be more optimistic when compared with the Great East Japan Earthquake in 2011. Respondents used words such as “Freedom, Diligent and Spirited” to describe their current mood while words such as “Anxiety and Patience” were used immediately after the 2011 earthquake.
- Although great disruptions were caused in the lifestyle of consumers, along with economic uncertainty, 43.2% of consumers from a survey study responded that some positive influence was seen from COVID-19. Popular responses included improved information literacy, work-style reform and the importance of relationships with people.
- Studies on trends amongst females aged from 16 – 25 on their views while under the stay-at-home order indicate that they significantly miss engaging in activities with their friends. Over a fourth of respondents included the keyword of “with friends” for activities they would like to engage in once COVID-19 subsides,

Travel Trends

- Total sales amongst 48 major Japanese travel agencies greatly declined by 18.9% in February alone. Pax handled for international tour products also dropped by 14.6% to roughly 140,000 people. As restrictions were strengthened globally in March, these numbers will be further inflated for the coming months.
- Expedia Holdings announced strategies to support hotels struggling from COVID-19. Utilizing data from past incidents such as the SARS outbreak, recovery patterns will be analyzed to provide hoteliers with a platform to appropriately strategize operations. In the short-term, recommendations were made to acquiring the domestic travel segments while placing the acquisition of international travelers on a more long-term horizon.

Media Trends

- With the national emergency declaration forcing people to stay at home, various publications have begun offering free contents for consumers in efforts to acquire new audiences. Diamond Big Co. which publishes travel guidebooks are now offering consumers the ability to read all 185 of their titles from their 5 major series for a limited time. Similarly, JTB publishing is also now offering their roughly 200 editions for domestic and international travels for free.
- Various media are increasingly picking up sustainability as a hot topic, introducing sustainable fashions, products and initiatives within their contents, websites and online. Vogue Japan has launched a new project titled “Vogue Change”, aimed at discussing societal issues and sample

cases from around the world. Three major categories of “diversity & inclusion”, “sustainability” and “work-life balance” have been established for their new contents. Additionally, some celebrities such as Shibasaki Ko have produced their own video contents with sustainability on mind, sharing it on their owned media such as their YouTube channels.

Airlift

- Suspension of most direct flights between Japan and Hawai‘i have been extended to 5/31, with certain routes being suspended for longer durations.
- With the global drop in oil prices, JAL and ANA have announced that fuel surcharge rates will not be incurred for tickets issued from June onwards.
- COVID-19 has caused bookings for the popular Golden Week holiday seasons to decline by 85 – 98%. ANA and JAL have both recorded bookings to be at roughly just 2 – 4% that of the previous year with under 10,000 pax. Seats operated also declined by 89.4% for ANA and 94.1% for JAL.
- ANA Holdings made downward revisions to 2020 performance projections, lowering revenues by 120 billion yen. Additionally, their 3rd Airbus A380 originally set for operation to start in June has been delayed by 6 months.
- Japanese LCC ZIPAIR applied to the US DOT for approval to operate service from Narita – Honolulu. ZIPAIR is an LCC operated under JAL and operates to mid-range international destinations. They aim to begin service by 10/25 when the winter schedules are set to begin.

Market Intelligence/Market Conditions Impact on Hawai‘i Travel

As COVID-19 continued to spread globally in April, it is being touted by many as the worst economic crisis in the post-war era. Although confirmed cases and the number of deaths continued to climb in many regions, many have become weary of the economic impacts that the pandemic poses as the majority of leading nations entered lockdown. With travels slowing down to a trickle to mitigate spread of COVID-19, the industry speculates that the restarting of the sector will take a significant amount of time as consumers continue to be wary of the risks posed.

Conversely, some positive effects have been seen which provide a silver lining for the industry. As Japanese consumers are forced to stay confined within their dwellings, some have shown indications for increased desire to travel once the effects of COVID-19 subside. Although significant amounts of uncertainty were posed by the current conditions, consumers were also reminded of the importance of cherishing time spent with one another. Such factors present some positive factors to restart the travel sector as a whole.

Activity Update

Travel Trade

- With the outbreak of the COVID-19 in both Japan and Hawai‘i, along with the hosting of all events, including Hawai‘i related events in Japan, the Hawai‘i Expo Nagoya planned in May, Hawai‘i Expo Osaka planned in July and Hawai‘i Expo Sapporo planned in September have all been canceled. HTJ is currently working out alternative strategies to host the Expo in October or virtually.

- In efforts to mitigate spread of COVID-19, travel agencies are complying with the requests to refrain from hosting seminars and events. As a result, the HTJ sales team focused on sales calls to each of the major travel agencies to grasp an understanding of their current conditions and share appropriate information amidst the COVID-19 outbreak. No other significant initiatives were carried out due to the COVID-19.
- With the official emergency state declaration by the Japanese government on 4/7, all travel agencies have temporarily ceased operations, resulting in little movement from the industry.
- HTJ conducted Zoom meetings with top representatives of JAL, ANA, Delta, JTB and HIS together with HTA to obtain updates on current situations, while also discussing potential future recovery programs.
- Travel trade activities focused on the limited initiatives that can be engaged given the current conditions. This included creation of contents for the webinar planned in May, diffusion of the “Hawai’i from Home” initiatives and making revisions to the 2020 BMP under these unprecedented conditions.
- Focused on development, reevaluation and renewal of educational contents for travel agent staff to utilize as they work from their homes.

Aloha Program

- HTJ is encouraging travel agency staff to learn about Hawai’i through the Aloha Program contents and Hawai’i specialist exams as they are confined to working from home to gain knowledge in better selling the destination once operations are resumed. Hawai’i specialist exams taken in April reached record high numbers of 9,887. (This value also includes general consumer examinees)
- The Aloha Program website was renewed on 3/27. The site was completely redesigned, with new contents such as a series of columns to learn about Hawai’i, how to pass the Hawai’i specialist exams and a platform to connect with SNS to introduce images of Hawai’i and movie contents being added. Concurrent with the renewal of the site, the Aloha Program logo was also renewed, bearing in mind its core concept of connection between people and enrichment of knowledge on Hawai’i through learning about its culture and history.
- The fourth annual Aloha Program Week in Hawai’i event was held from 3/2 – 3/7 on Oahu. A total of 31 Hawai’i specialists ranging from beginner to advanced levels attended to learn first-hand about the culture, history and nature to gain a deeper understanding of Hawaiian values.
- A webinar on the history of Hawai’i was held by Aloha Program curator Mr. David Asanuma on 3/13 for a total 110 Hawai’i specialists. Main topics covered in the webinar were the influence of practitioners on Hawai’i. As the Japanese government also begins to encourage social distancing, HTJ will further utilize webinar systems to have members experience Hawai’i from home.

- Various promotional activities through the Aloha Program were continued in March. The Hawai'i ni Koishite TV show showcased the Island of Hawai'i and promoted membership of the Aloha Program, resulting in 159,315 impressions. Promotions also continued on Hokkaido's FM Northwave with roughly 314,285 monthly listeners.
- The 6th edition of the Aloha Program newsletter was issued on 4/1, featuring the surf culture of Hawai'i, history of aloha shirts and an interview column with Ms. Rolinda Lois from the Island of Hawai'i to share on Hawaiian culture. The newsletter is open to the public on the Aloha Program website, which has reach of approximately 53,008.

Public Relations

- HTJ focused heavily on dissemination of accurate information pertaining to Hawai'i as the various entry restrictions and measures to mitigate spread of COVID-19 were imposed in Hawai'i. All statements made by HTA and the government were translated and shared on the allHawai'i.jp portal site for Japanese consumers/industry partners to keep up to date on the occurrences. HTJ also ensured appropriate response to all consumer inquiries received as they dramatically rose when the government's measures to curb COVID-19 were announced.
- The COVID-19 outbreak is prompting the postponement of many planned media exposures for Hawai'i to later dates in 2020, with some being canceled altogether. Major female magazines which typically issue special Hawai'i focused editions from early Summer have postponed their coverage.
- HTJ has maintained communication with key media on their future coverage for Hawai'i as many media have resorted to switching destinations covered to domestic ones.
- Some exposures for Hawai'i were published from the Island of Hawai'i newspaper press tour held in December 2019. Additionally, during the third and fourth week of March, coverage on Governor Ige's request for travelers to postpone trips to Hawai'i was heavily covered. Another topic extensively covered was the cancelation of air service by airlines.
- HTJ supported an interview with Mr. C. Tatum of HTA on a Japanese TV Program on the various measurements taken to combat COVID-19 in Hawai'i. Additionally, HTJ also arranged an interview with industry magazine Travel Watch to explain the initiatives HTJ has been carrying out, along with future activities in relation to COVID-19.
- HTJ posted an image of Waikiki's scenery on SNS platforms to share the message of Aloha, resulting in very positive reactions and over 82,413 impressions. Many of the comments featured statements expressing their desire to return to Hawai'i once COVID-19 subsides, along with appreciation for sharing Aloha through the post.

Other

- As part of phase 1 of recovery initiatives, HTJ started the "Ouchi de Hawai'i", (Hawai'i from home) program within the official portal site, allhawaii.jp for consumers to feel and experience Hawai'i while they are confined to their homes from COVID-19. The program has 6 distinct categories of Virtual Hawai'i, Relax Hawai'i, Learn Hawai'i, Music Hawai'i, Read Hawai'i and Movie Hawai'i. A

column for each category is posted each week to provide continuous new contents. As of 4/30, the program was featured on a total of 88 TV programs, online and newspapers, and will continue to be diffused through media, SNS platforms and mail magazines. Please refer to the attached file for further details on the program.

- A new survey study program has been launched through 5/31, asking consumers on when they would like to visit Hawai'i again. Roughly 16% stated that they would like to visit Hawai'i once the travel restrictions are lifted within the year, while the rest stated intents to wait until 2021 onwards.
- Worked on researching new trends and strategizing effective new plans for the 2021 BMP.

Sales Activities

Sales Calls			
Airline	Wholesaler/TA/TO/OTA	Other	Total
9	39	12	60

Travel Agents:

- With the official declaration of national emergency status by the Japanese government, travel agencies have had to close retail outlets and/or have most staff work from home.
- In addition to tours to international destinations including Hawai'i, all domestic tour products have also been canceled through May, greatly impacting operations.
- Travel agencies view recovery in the sector to begin with domestic travels, followed by international business trips with international leisure travels being the last portion to recover. Even if travels to Hawai'i are fully opened by June, significant economic uncertainty and overall attitudes towards travels may cause a sluggish return for the market. Overall views for full recovery of the market point towards Fall at the earliest, with potential to also last until 2021.
- Although major travel agencies have been able to maintain status without filing for bankruptcies, should current conditions continue for a longer duration, major travel agencies may also begin to file for bankruptcy.

JTB

- Staff in both Japan and Hawai'i have been placed on temporary break and/or work from home, making it not possible to effectively strategize future initiatives such as pricing.
- Advertising budgets have been temporarily zeroed out, making it impossible to conduct campaigns.
- Internal discussions for recovery have been underway but because support from airlines and hotels will be needed, they are waiting until effective communications can be held with these partners to organize details.
- JTB would like recovery initiatives to be carried out under the "all Japan" team, whereby all stakeholders work together to revitalize the market.
- If the Honolulu Marathon is to be carried out without being canceled, they will focus on attracting customers starting from this period.

HIS

- HIS has canceled their major Hawai'i event, the Honolulu Ekiden.
- They view recovery of the market to take a significantly long time and are unsure whether it can be achieved within 2020.
- Preparation for recovery initiatives have been formulated. They will initially begin with online advertisements targeting younger generations. Depending on the market response, they will begin resumption of newspaper ads followed by other campaigns.
- HIS has stated that appealing the safety of Hawai'i will be essential in recovery for the Japanese market. They would like to request that HTA lead projects to implement safety measures and develop systems allowing for this to be seen at a glance.

KNT

- All retail outlets have been temporarily closed due to COVID-19, with staff placed on break.
- Their annual "Matsuri in Hawai'i" event has also been canceled.

JALPAK

- All staff are temporarily working from home.
- Although preparations had been made to begin recovery initiatives from May, it has been placed on hold as the effects of the COVID-19 have not shown significant enough signs to subside in Japan.
- Although special recovery rates will be offered by parent company JAL, because advertisement budgets have been slashed, JALPAK will most likely focus on online ad campaigns.

Tabikobo

- Although announcements were made that Tabikobo will be applying for loans summing up to 2.3 billion yen, they have maintained their initiatives on accepting some new graduates that had been denied positions at other companies.
- Tabikobo's retail outlets in Fukuoka and Sapporo will be shut down.

Partner Relations

- With the COVID-19 outbreak, the HTJ Honolulu office focused on collection of information from wholesalers, partners and other industry partners to share with HTA. HTJ also translated all announcements made by Hawai'i's government to be shared with partners, while also posting all relevant information on allHawai'i.jp.
- HTJ participated in a video conference with the 10 Japan Hawai'i Travel Association board members to discuss current conditions at each of their companies, along with their initiatives. Most of their staff have been working from home, with some customer service representatives placed on furlough due to the lack of Japanese visitors. At the meeting, HTJ encouraged use of the "Hawai'i from home" and Aloha Program contents to focus on education of their staff.

- JATA's millennial market project to proactively encourage travels amongst millennials have been canceled for 2020 from COVID-19. Hawai'i had been selected as one of the destinations whereby travel was encouraged for but has been canceled.

Responsible Tourism Update

- Contents of the Share the Aloha, Hawai'i Rooted and Our Islands videos were played on digital signage stations and OOH at Fukuoka station from 3/16 – 3/22, reaching approximately 3,330,000 people.
- HTJ continued supporting ANA's in-flight TV program, "AiNA HAWAii" where cultural and historical contents on Hawai'i are shared, along with the Malama Hawai'i movie. The program is broadcasted on all of ANA's domestic and international flights.
- Share the Aloha ads were displayed on the top page of Yahoo's desktop site and smartphone page, targeting men and women aged between 25 – 54 in Fukuoka. The desktop version was displayed from 3/16 – 3/27 and obtained a total 277,778 impressions. The smartphone version was displayed from 3/20 – 3/27 and obtained a total 307,000 impressions.
- Inserted Japanese subtitles on the new Share the Aloha movie and shared it on HTJ's official website and SNS platforms. The movie recorded 82,413 views as of 4/24. Links to the movie were also sent out via the official HTJ and Aloha Program email magazines to a total of 404,906 consumers.

Hawai'i Tourism Canada

2020 Monthly Leisure Marketing Report – March/April

Market Intelligence/Market Conditions

Economy

- The IMF said it now expects Canada's GDP to contract 6.2 percent this year. That marks an eight-percentage-point decline from its forecast of 1.8 percent growth in January.
- Canada's trade sector will continue to be challenged by weak global growth.
- The federal government has committed more than \$100 billion in economic measures to help individuals and businesses get through the crisis.
- Canadian employment plunged by nearly two million people and the jobless rate surged to 13 percent in April as companies were forced to slash payroll in response to restrictive lockdown measures aimed at curbing the spread of the novel coronavirus.
- The federal government will help provinces top up the wages of essential workers during the COVID-19 pandemic, Prime Minister Justin Trudeau announced on May 7. The top-up will total \$4 billion, with the federal government covering 75 percent of the cost.
- The Canadian Dollar averaged USD \$0.76 cents throughout the first two months of 2020, a similar value to 2019 (0.5%). In March and April, the volatility of oil prices and the COVID-19 financial crisis brought the value of the Canadian Dollar down to \$0.72.

Outbound Travel Market

Prior to the introduction of the global COVID-19 pandemic in North America, outbound travel activity was performing very well. During the first two months of 2020 Canadians made 5.5 million overnight trips to the U.S. and other destinations, an annual increase of 4.9 percent. Of these trips, an estimated 4.3 million were for leisure purposes. During the period, overseas leisure trips increased 4.2 percent and transborder leisure trips increased 5.5 percent. Overseas trips accounted for 48.4 percent of travel at the beginning of 2020, compared to 44.6 percent a decade ago (2010).

Canadians made 2.93 million overnight trips to the U.S. in January and February, compared to 2.77 million in 2019. During the period, overnight trips by automobile increased 5.3 percent while travel by other modes increased 6.0 percent. While most of the tracked cities in Florida saw an increase in air arrivals compared to 2019, other destinations recorded a reduction in activity as COVID-19 began to spread. Nationally, ADR in \$USD rose slightly during the period (1.4%), prompting a 0.9 percent increase in the relative rate in \$CAD. The first four months of the winter travel season registered almost 5.9 million overnight trips for all purposes, a 4.7 percent increase compared to 2018-19.

Compared to 2019, Canadian arrivals in Hawai'i recorded a -25.7% drop during the first quarter of 2020. During the period, direct arrivals fell -25.6% while indirect arrivals decreased -26.1%. January (-4.9%) and February (-1.9%) saw minimal declines in arrivals, while activity fell by almost 50 thousand in March (-65.0%) due to the travel restrictions associated with the COVID-19 outbreak.

Competitive Environment

There were 552 thousand Canadian arrivals in key destinations in the Asia/Pacific region throughout the first two months of 2020. This -19.9% drop in visitation is reflective of 137 thousand fewer arrivals in the region due to the onset of the COVID-19 outbreak. In Hong Kong alone, the average daily hotel rate in \$CAD declined 27.2% and the occupancy rate fell by 48 points as the virus began to affect visitation. The first four months of the 2019-20 winter season saw 1.2 million arrivals in the region, a -10.4% decrease compared to 2018-19.

There were 1.7 million Canadian arrivals in Mexico, the Caribbean, and Central America throughout the first two months of 2020, a 5.1% increase compared to 2019. Of the larger volume destinations, arrivals in Mexico grew 4.2%, trips to the Dominican Republic increased 9.2%, and visits to Cuba increased 4.8%. The region saw 2.7 million arrivals throughout the first four months of the winter 2019-20 travel season, an increase of 5.3% compared to 2018-19.

Consumer Trends

After posting the largest monthly decline ever recorded last month, the consumer confidence index has now plummeted to 47.6, its lowest level ever. Because of COVID-19, the index has fallen an astounding 73 points in just two months. Every region except Quebec and Atlantic Canada is at a record low, and Canadians, **overall**, are understandably very concerned about their future finances and job prospects. Nationally, 36% of respondents expect their finances to worsen over the next six months, and 53% expect their job prospects to worsen—the most since 2009. With little optimism for the near future, just one-quarter of Canadians think now is a good time to make a major purchase.

Travel Trends

According to the Summer Travel Intention report of the Conference Board of Canada, amidst the global COVID-19 pandemic, summer travel intentions have fallen to the lowest level ever. Just 45% of Canadians are currently planning an overnight leisure trip, and two-thirds of this activity will be within Canada. Of those who have selected a destination, only 31% have plans to leave the country, with sixty percent of these trips intended for the latter half of the season.

Overall, just 45% of Canadians are planning to take a leisure trip in the coming months, a massive decline compared to previous years. The proportion of respondents who are currently planning any leisure travel this summer has decreased most dramatically in Alberta (-38%), Ontario (-36%) and British Columbia (-35%). Of those planning a trip, less than one-third intend to leave the country (31%), while 65% are planning to travel domestically.

Despite this negative sentiment, there is an element of “wait and see” being reported. The share of respondents who are currently unsure about their upcoming travel plans has jumped to 22 per cent compared to 9% one year ago. Of these potential travellers, 80% cited COVID-19 as the primary reason they are unsure about their summer travel activity. In addition, more than half of respondents who outright said they would not be taking an overnight leisure trip pointed to the virus as the main driver of their decision.

After enduring weeks of physical distancing measures, visiting friends and relatives (VFR) is driving a larger share of outbound travel planning than in previous years. While vacation/pleasure trips still account for the largest proportion of intended travel, the primary purpose of 27 percent of outbound trips is VFR activity (compared to 22% in 2019).

Travel professionals are weighing in how travel restrictions and an unprecedented wave of cancellations are expected to disrupt their 2020 sales figures. Travel agencies will have to implement cost-cutting measures. But they are getting ready to go back to business as soon as the government eases stay-at-home restrictions. Agents are mapping out the road to recovery and questioning what will come back first in terms of bookings, and what will come back last, and how the fallout from the COVID-19 pandemic will change the way the world travels. Advance Purchase is now a key factor among travelers, the non-refundable, no cancellations model is no longer useful, so finding a new option will be crucial. The cost and protection coverage of travel insurance is also an essential factor to consider. Travel advisor service fees and commission rates will likely be restructured.

Media Trends

It has been over 7 weeks since COVID 19 has been declared a global pandemic, and over 4 months since news of the first case of the virus emerged. In the early stages, Canadians eagerly tuned in to news from all sources, as new details emerged, and the government announced closures and financial support programs on a regular basis. As time passes, according to a global survey by IMI International, 2 out of 3 Canadians are “tired of COVID 19 information and data.”

Television:

News viewership peaked the week of March 16th, the same week Ontario, Alberta, BC, and PEI declared states of emergency. Viewers are seeking an escape in Lifestyle and Entertainment categories with steady increases since the beginning of the pandemic. Programs with episodes previously recorded have seen increased viewership as consumers seek out fresh content. Sports stations are now slowly trending upward as viewers tune in to re-watch their favourite moments from past seasons. These trends are more pronounced in the Toronto/Hamilton markets, as the bulk of Ontario’s cases have been within the greater Toronto area.

Digital:

- Digital consumption continues to grow and is not flattening – both visits and time spent is up.
- Time spent with news content continues to grow and is driven by sites categorized as local news (+73%), business/finance (+28%) and general news (+94%).
- As expected, there has been a decline in categories, such as, automotive, real estate, sports and travel.
- Time spent with mobile has increased by 15% in recent weeks and engagement is expected to continue to increase.
- Traffic to gaming websites now represents 17% of browsing minutes, a 71% increase in traffic from the beginning of the pandemic.
- According to Kijiji, pageviews for its Friendships/Networking category are +144%, and Pets are up 219% (Dogs up 166%) since Canadians began taking social distancing measures.

Radio:

While radio has declined by 32% since COVID-19 was declared a pandemic, tuning to stations that broadcast all news has declined at a faster rate (51%). As consumers have been spending more time in their homes and working from home without a commute, overall radio tuning has decreased. News/Talk remains the top format but has also experienced a decline. According to an April 20 study by Angus Reid, of Canadians that have recently listened to more AM/FM Radio, 58% do so for entertainment, 26% do so for comfort, and 23% do so to help escape the bad news around COVID-19. An interesting caveat with Radio is that the shift between News and other categories is not as evident with Radio as it has been with other mediums.

New Forms of Entertainment:

- While staying home, consumers are looking for ways to stay connected that they may not have considered previously, such as, consuming new types of content and media.
- App downloads have increased by 62% for the top three streaming apps, Netflix, Amazon Prime and Disney+.
- Consumers are turning to video and conference apps to stay connected. Houseparty downloads have increased by 900% as well as zoom downloads increased. TikTok is approaching 6 million users in Canada as more consumers leverage it to make videos with their family members.
- Food and Recipe content is seeing an increase as consumers experiment with new recipes and home cooking.

Airlift

- Air Canada is suspending most international flights until June, while Air Transat and Sunwing are cancelling all trips until late June due to the COVID-19 pandemic. Air Canada anticipates that it will resume flying worldwide in time for the holidays. Air Canada's VP of Cargo, Tim Strauss suggests that the carrier will be flying to most places around the world and is confident that domestic flights will also be in operation by then. As it stands, 90% of Air Canada's fleet is at a standstill due to the COVID-19 pandemic. Strauss said there are signs the economy is about to turn around. Manufacturers are moving parts around the world on Air Canada's cargo flights, he said, and his company is getting ready to transport retail goods from clothing manufacturers to North America.
- WestJet, including Swoop, has suspended commercial operations for all transborder and international flights through June 4.
- Canadian airlines are bringing back employees through government programs:
 - The 16,500 workers that were laid off by Air Canada in March due to the COVID-19 crisis are being hired back by the airline, the company announced Wednesday, April 8. The program is intended to generally reimburse employers suffering revenue declines exceeding 30 percent, which is the case for Air Canada.
 - WestJet, WestJet Encore, and Swoop will now save more than 1,000 of those jobs. The airline reached an agreement with the Airline Pilot Association (ALPA), that will provide their Canada-based pilots with additional financial support for the duration of the wage subsidies term. WestJet has also agreed to re-hire almost 6,400 employees once the Canadian government has approved the Canada Emergency Wage Subsidy program.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

The Canadian economy has been severely affected because of the drop on the oil price and as consequence of the COVID-19 lockdown. The Canadian Federal Government has developed measures to counteract the impact of the economic crisis in Canadian homes.

- Prime Minister Justin Trudeau announced more measures to support businesses and young Canadians taking a financial hit from the global pandemic.
- 4 million Canadians have applied for government assistance as a result of lay-offs and reduced work hours.
- Canada's six largest banks are reducing interest rates on credit cards by about half and are allowing deferment of payments for up to six months.
- The Bank of Canada's interest rate is now at 0.25%.
- Applications for the CERB (Canada Emergency Response Benefit) payments to eligible Canadians who lost income because of COVID-19 began this week. The emergency funding program, which offers eligible applicants \$2,000 a month for a period of up to four months, is just one of the measures the Canadian government has launched to try and buoy families and businesses feeling the fallout of the virus.
- Businesses and non-profit organizations that see a drop of at least 30 percent in revenue due to COVID-19 will qualify for the government's 75 percent wage subsidy program. The program could mean payments of up to \$847 a week — and the prime minister encouraged businesses to top up their employees' wages with the remaining 25 percent of their salaries.
- Travellers returning to Canada MUST self-isolate for 14 days due to Canada's Quarantine Act (put in place March 26).
- A number of Canadian provinces have set up checkpoints at their borders to restrict traffic, VIA Rail has suspended train service on the "Canadian" between Toronto and Vancouver and anyone in Canada showing symptoms related to COVID-19 is barred from boarding domestic flights and trains.
- Ferries and essential passenger vessel operators have reduced the maximum number of passengers carried on board by half. Transport Canada says operators will also implement alternative practices to reduce the spread of the virus, such as keeping people in their vehicles. These measures will be in place until at least June 3.
- **The Canadian border remains closed and only Canadians citizens and Canadian permanent residents are currently allowed into the country.**

Activity Update

Travel Trade

The HTCAN team has been in ongoing communication with the Canadian travel trade partners.

Effective April 1, the WestJet trade marketing and sales expo team is on a temporary leave of absence. The team is not sure at this time how long they will be off for, but they are confident and optimistic that things will start to turn around, and travel and tourism will be back. On April 9, the company announced rehires of 6,500 employees thanks to governmental support.

Air Canada and Air Canada Vacations laid off 16,500 employees plus 5,000 flight attendants, the group announced April 7 that they will rehire 16,500 people with governmental support.

Travel Brands laid off 80% of their employees.

Public Relations

- Individual press trips for 2020:
 - Barry Choi – Freelance Journalist was scheduled to visit in May, however due to the current situation we have cancelled the trip.
 - Catherine Lefebvre was scheduled to visit in May, however due to the current situation we have cancelled her trip.
- Gathering information on virtual tours for several journalists. Sent information to Carlyne Parent and Simone Olivero.

Sales Activities

Airline	Wholesaler/TA/TO/OTA	Other	Total
2/month	10/month	3	

Travel advisors are working from home, and they are trying to figure out what is next. One of the best ways to be productive is to continue to work on Education. Most professionals will be preparing for the future by watching recorded webinars, learning about destinations, getting updated and ready to sell. This is an opportunity to promote the Hawai'i specialist program and to increase the number of specialists in Canada.

Travel advisors are creating virtual experiences, webinars, and other immersive video formats to drive higher engagement levels with their clients on social media platforms. Maintain this meaningful connection throughout the COVID-19 pandemic offers them a higher chance of future bookings. By hosting Facebook live webinars or sharing VR and 360 videos, agents expect to deliver an optimistic message to their clientele.

Responsible Tourism Update

Hawaiian Culture

In late March HTCAN sent the HSDP agents, industry leaders and MCI partners a message of hope highlighting the Aloha Spirit. HTCAN has shared the Aloha video produced by HVCB during the COVID-19 pandemic. The video focus on the fact that this isn't the time to visit the Hawaiian Islands but offers a beautiful and emotional message of hope for future travel. More than 1000 Hawai'i specialists in Canada received an email with this video on April 16, 2020.

Nature Resources

HTCAN is always trying to minimize its environmental impact with this purpose, a major effort is constantly made to encourage agents not to use the printed materials, but the digital versions. Also, HTCAN has made sure that all the branded promotional items are either recyclable, made of recycled materials and/or are biodegradable.

Community

HTCAN approached the Indigenous Tourism Association of Canada as a support to include the indigenous community in the Sea Cleaners initiative, however this project has been cancelled.

Hawai'i Tourism Oceania 2020 Monthly Leisure Marketing Report – March and April

Market Intelligence/Market Conditions

Economy

Australia

Australia spent the month in a state of lockdown with a directive to leave home for essential needs only. The total travel ban remains in effect and some Australian states have closed their borders. With over two thirds of confirmed COVID-19 cases occurring in returned travellers or tourists, Australia has enacted a mandatory two weeks in quarantine for all arrivals. At the end of the month, there were 6,750 cases and 91 fatalities reported.

In mid-April, cases began to decline, and we began to see a 'flattening of the curve', providing confidence that the lockdown measures have been effective. Towards the end of the month there was a slight easing of restrictions with regards to social gatherings and being outdoors, however most businesses remain closed or in hibernation. No date has been given for an easing of restrictions, though government reports suggest that when changes are made, it will be done in four week increments to gauge the impact on the number of infections. Australia has one of the highest testing rates in the world and the government has released a contact tracing app which has so far been downloaded by more than 5 million Australians.

Australian Bureau of Statistics figures show that the number of jobs in Australia fell by 7.5% between mid-March and mid-April. The Treasury department estimates that unemployment will double in the June Quarter from 5.1% to 10%. The AU\$ began the month at US\$0.60 but rose to a more stable US\$0.64 at the end of the month.

New Zealand

New Zealand's decision to act quickly and strictly around a full lockdown and closing of borders appears to have paid off. New Zealand had been showing very high statistics of COVID-19 spread through the first half of March and now, following the government implementations the country is down to just 2-3 new cases a day, with some days showing zero.

From an economic perspective, the push is now for the government to lessen restrictions and begin opening up business activity. The country is about to move from level 3 to level 2 which should see the economic recovery start. This includes the opening of domestic tourism. The management of COVID-19 in New Zealand has seen the exchange rate recover from US\$0.56 in late March to US\$0.61 at the end of April.

Outbound Travel Market

Australia

Travel patterns in February 2020 remained strong and in line with normal travel trends at the same level as the previous month, with 928,000 trips overseas. This is an increase of 5.3% on the same month the previous year. The three leading destinations were: New Zealand (125,100); Indonesia (92,500); USA (59,800). The highest annual increases were recorded for Vietnam (30%), Indonesia (17%) and Japan (11%). The USA saw an annual increase of 4%.

New Zealand

With the closing of borders in the middle of March, outbound tourism reduced to close to zero during April. The only exception were some essential travel requirements, and repatriation (in both directions).

Competitive Environment

Australia

- Tourism Australia will channel its efforts into strongly encouraging Australians to holiday at home under a strategy to restart Australia's tourism industry post COVID-19. Tourism Australia is spearheading a digital/VR domestic campaign in partnership with state tourism organizations.
- Air Canada has announced the suspension of scheduled services to the USA effective from April 26, after an agreement between the countries' respective governments to extend border restrictions for an extra 30 days.
- Tourism Western Australia is offering a range of nature, wildlife, food and drink, and cultural experiences that can be sampled virtually. The tourism board is highlighting a number of online options showcasing different aspects of the state's tourism attractions.
- Tourism Fiji has launched a new social media campaign based on the Fijian phrase "Sota tale" which means "stay safe and we will see you soon". It is part of Tourism Fiji's four stages to market re-entry that the organization is implementing to return the destination to the Australian market.

New Zealand

- Most international destinations are taking a similar approach in keeping some presence, but presence with the right tone. There has been an increase in virtual tourism promotions as well as well as trade online training.

Consumer Trends

Australia & New Zealand

- Almost 40% of Australians cancelled planned international and domestic holidays over the last month, according to a new report about behavior since COVID-19 was declared to be a pandemic. The study, compiled by research advisory firm StollzNow, covers the period March 19 to April 9 and summarizes input from more than 4,000 Australian residents. New bookings are also on hold, with 40% of Australians having deferred making future plans to travel, the statistics reveal. The trend towards putting holidays on hold is similar for all age groups, with the report saying deferrals are the result of travel being effectively banned and no indication of when it can be resumed.

Travel Trends

Australia & New Zealand

- Virgin Australia announced that it was entering voluntary administration. The government rejected its pleas for a loan to bail them out. This means they have appointed administrators to try and avoid insolvency. They will now seek to attract investors and restructure the company to be able to continue operating. During this period, they are continuing to operate a reduced domestic schedule.
- In response to the COVID-19 situation, Helloworld has stood down 1,300 or 65% of its workforce, initially to May 31. They will also make 275 staff redundant across all countries in which they operate.
- Similarly, Flight Centre has reduced its 20,000-person global workforce by about 6,000 roles. Some positions have been made redundant and 3,800 staff have been stood down until further notice.

- Qantas and Jetstar announced that two-thirds of their 30,000 employees will be temporarily stood down from late March until at least the end of May.

Airlift

Australia

- Qantas and Jetstar have suspended all international flights from the end of March to a new revised date of at least the end of July now. Qantas is still operating some repatriation flights.
- Hawaiian Airlines suspended all flights from Australia on March 22 with an estimated resumption date (at this stage) of July 1.

New Zealand

- Both Hawaiian and Air NZ have suspended their Honolulu services till the beginning of July. But this will almost certainly be extended as it does not look like international air access permissions will be opened by the government by then. The only exception is a possible opening of Australia-NZ borders which will be an important test-case to then extend to the Pacific Islands and beyond.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

Australia & New Zealand

The current uncertainty and ban on all international travel will affect intention to travel and bookings for the foreseeable future. Forward bookings have stopped, and airlines are issuing credits for cancelled flights. Once recovery commences, it's hoped consumers will start to think about re-booking with their credit.

Activity Update

Social Media: HTO has paused all organic and paid social media activity and are currently only posting content supplied by HTA/HVCB. We have posted the images supplied to us from HVCB and the #ShareAloha video. This content received good amount of engagement from our followers.

Travel Trade

- **Aloha Fridays:** Every second Friday Travel Weekly includes an Aloha Friday wrap featuring Hawai'i news in their Friday digital newsletter that goes out to 14,200 people in the travel industry. The NZ partner for Aloha Friday is Travel Today which is distributed to the NZ travel industry weekly. This month the article featured the following activities:
 - Hawai'i encourages travellers to #ShareAloha from home
 - Hawai'i's Battleship Missouri Memorial offers free virtual tour to students
 - "Aloha from our home to yours": Hawai'i's message to travellers
 - Here's how your clients can experience Oahu's rich history and culture

Public Relations

Per HTA's instructions, HTO has paused all public relations activity. Although HTO ceased proactive media outreach, Hawai'i content was published by various outlets. These articles were filed by journalists independently or because of previously held famils, and this publicity could not be prevented.

The COVID-19 crisis continues to make headline news across the world. However, within the Australian and New Zealand media, the COVID-19 situation in Hawai'i has received few mentions, with most

coverage focusing on the unfolding situations domestically as well as in Europe, the UK and mainland USA.

Sales Activities

Sales Calls

Airline	Wholesaler/TA/TO/OTA	Other	Total
0	0	0	0

Zoom calls have taken place with various trade partners including Brand USA, Air NZ, Hawaiian Airlines and Qantas.

Responsible Tourism Update

HTO are continuing to play a role in the expanded Sea Cleaners initiative which will be moved to 2021.

Hawai'i Tourism China

2020 Monthly Leisure Marketing Report – March/April

Market Intelligence/Market Conditions

- **Currency:** In April, the Chinese Yuan weakened against the USD from 7.03 to 7.11.
- **Unemployment rate:** As of March 2020, the unemployment rate in China reached 5.9%.
- **GDP** reached RMB 20,650.4 Billion in Q1 2020, contracts 6.8% YOY.
- **Disposable Income** RMB 8,561 in Q1 2020, decrease of 3.9%
- In China, cross-provincial and cross-boundary tourism and national cultural and sports activities will not temporarily resume according to current COVID-19 situation.

Outbound Travel Market

- Global business travel expenditure increased by only 3.1% in 2019, the lowest growth rate since the economic crisis, according to the 2019-2020 Business Travel Market Management White Paper released by Trip.com Group's business travel unit Ctrip Corporate Travel on April 23. As the world's largest business travel market, China registered a declined growth rate of 5.9% last year, while the average annual growth rate in 2013-2018 was 11%.
- OTAs are still major booking platform for domestic business travel, with a penetration rate of 70.1%. TMCs are popular in China's first-tier cities, while a mix of OTAs, airlines/hotel direct channels and traditional travel agencies dominate the lower-tier markets.
- China's e-commerce company JD.com's fully-owned subsidiary Suqian Hanbang has agreed to subscribe to 73 million newly issued shares of travel service provider Caissa Tosun for about RMB 450 million (USD 63.5 million).
- To support travel agencies recovery especially for outbound industry, ICBC and the Ministry of Culture and Tourism of the People's Republic of China signed a strategic cooperation agreement to assist cultural and tourism businesses. ICBC plans to provide up to 100 billion CNY (US\$ 14.5 billion) in financing and credit to these businesses for them to resume work.

Impact on Hawai'i:

Although Hawai'i remains under lockdown with no direct flights from China, China MCI tourism industry is becoming active. Incentive groups requests in Q4 2020 are active and HTC is working with MCI agencies to provide destination information to prospective clients.

Competitive Environment

- South Korea announced that all visitors will have mandatory 14-day quarantine from April 1, 2020, and visitors have to install the self-diagnosis mobile app and record their daily health status on the app during quarantine.
- Islands of Tahiti: ban foreign nationals to enter till April 11, 2020.

- Maldives: Suspended visa on arrival service, and ban foreign nationals to enter since March 27, 2020 till further notice.
- Japan has extended their ban foreign national visitors from entering the country if they are from or visited a list of 73 countries two weeks prior to their visit to Japan till the end of May 2020.
- Visit California, New Zealand, Seychelles, Fiji and Germany conducted live streaming to consumers and travel trade partners.
- Island of Tahiti, Australia, New Zealand, Maldives and Brand USA posted regularly on social media channels.

Consumer Trends

- UBS Evidence Lab conducted a survey regarding consumer trends. 54% of respondents said their income has declined since the outbreak. 47% plan to increase their budgets on sports and recreational activities after outbreak is under control. 38% increased their online shopping spending.

Travel Trends

- According to a recent survey by OLIVER WYMAN, 77 percent of Chinese travelers would consider domestic destinations for their first trip after the COVID-19 epidemic subsides. Moreover, 56 percent of those surveyed would be willing to spend more on traveling than before the start of the COVID-19 outbreak. In the survey, many respondents gave their concern for safety as one of the main reasons in choosing their next destination. Other popular reasons included choosing a destination closer to nature and choosing domestic destinations. Nearly 60 percent of surveyed consumers would not change their traveling plan and they even plan to increase their traveling frequency for the remainder of the year. Nearly half of them said they would avoid taking cruises over the next few years due to the multiple COVID-19 outbreaks on cruise ships recently. More than 80 percent said they would only start traveling again when all the patients in mainland China were cured, with 60 percent of the survey pool going further by saying they would wait for another month from then.

Media Trends

- More and more destinations are turning toward digital virtual live streaming shows. The Chinese super app Meituan has rolled out live streaming features on its platform to promote traveling and provide training to tenants. E-commerce platform Pinduoduo has also launched a series of virtual travel via live broadcasts to promote tourist destinations in China. For example, Duo Duo Live, the live streaming section of Pinduoduo, held a seven-hour live streaming session for an ancient town in Hunan Province on April 26 with over 350,000 people joining the “virtual tour”. These platforms will be critical in educating visitors on Hawai‘i’s four pillars – natural resources, Hawaiian culture, community and brand marketing. HTC will continue to explore these platforms to deliver the highest ROI.

Airlift

- The newly-built Beijing Daxing International Airport has seen more flights move there from the Beijing Capital International Airport. In the mid of March, all international flights to Beijing scheduled

to land at the new Daxing International Airport have been redirected to Beijing Capital International Airport due to the outbreak of coronavirus.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

- The Chinese super app Meituan has rolled out live streaming features on its platform to promote traveling and provide training to tenants, Tech Planet reported on April 28, 2020. E-commerce platform Pinduoduo has also launched a series of virtual travel via live broadcasts to promote tourist destinations in China. HTC will proactively reach these platforms in the future.

Activity Update

Travel Trade

- **Mafengwo and HTC initiative Live Streaming**

In conjunction with the Spring promotion with Mafengwo, HTC conducted an episode of live streaming on Mafengwo platform on April 12th. The live streaming lasted about 100 minutes, there were total 2,877 audience watched this episode, received total 15,000 on viewers, comments, and likes.

- **HTC Live Webinar Training Program**

Following the recovery action to China market during coronavirus outbreak, HTC successfully partnered with travel agencies and conducted five online trainings to educate Chinese travel agencies and customer on live webinar platforms “Mafengwo” ”Xiaoe Tech” and “Lizhi” in April. The programs focused on different weekly topics, such as “General introduction”, “Aloha spirit” “Kuleana responsible tourism” and “MCI facilities”. There were 4,017 total live participants over the five webinar sessions with a total of 17,129 viewers.

- **HTC Attended Cultural Tourism Industry Recovery Conference and CTF**

To strengthen relationships and further partnership opportunities post-COVID-19 for the China tourism market, HTC attended the Cultural Tourism Industry Recovery Conference and CTF(中国口碑榜) hosted by Ctrip in Guiyang on April 15, 2020. Ctrip Group shared that latest data and insights reflect that most customers will focus on safety and health (康养游) post COVID-19.

James Jipanzhang Liang, Ctrip Board President, conducted an online webinar, which sold trip packages over 10 million RMB revenue within 1 hour. Ctrip will continue to promote domestic destinations in China in Q2 2020 via different platforms such as Douyin (Tik Tok), Kuaishou and Wechat. Ctrip plans to start outbound destination promotions when international pandemic is more in control. Hawai'i has many strong advantages over other destinations with good climate, safety and strict measures toward controlling the pandemic and has extended hospitality to the Ctrip Group in choosing Hawai'i as a destination of choice for Chinese in choosing long-haul destinations and welcoming James to come to Hawai'i in person in the future.

Public Relations

No news to report.

Sales Activities**Sales Calls**

Airline	Wholesaler/TA/TO/OTA	Other	Total
3	17	0	20

Responsible Tourism Update

In March and April, HTC conducted live webinars featuring Hawaiian culture, natural resources, and responsible tourism to travel trade agents (see above).

Hawai'i Tourism Korea

2020 Monthly Leisure Marketing Report – March / April

Market Intelligence/Market Conditions

Economy

- Unlike 47 countries which postponed general elections during the Covid-19 pandemic, South Korea held a successful national election on April 15. A record 66.2% turnout was achieved, higher than any parliamentary election since 1992. President Moon's Democratic Party won 180 seats in the 300-seat assembly, the biggest majority by any party since democracy. The landslide victory is seen as an endorsement of President Moon's leadership in response to the pandemic.
- The South Korean government has decided to push for a Korean version of the "New Deal" program to protect the country's major industries from Covid-19 shocks and maintain employment levels. The decision reflects the dire reality the local economy is bearing the brunt of the crisis. The government will draft an additional economic relief package worth 89.4 trillion won (US\$72.5 billion) to help hard-hit businesses, particularly small and medium firms, stabilize financial markets and boost livelihoods.
- The International Monetary Fund has predicted that South Korea's economy will shrink 1.2% in 2020 as the global economy has its worst year since the 1930s' Great Depression. The Korean economy contracted by 1.4% in the first quarter as the coronavirus pandemic caused a huge drop in domestic consumption and exports, according to Bank of Korea (BOK).
- Amid the prolonged economic fallout of Covid-19, there has been a surge in the number of South Koreans dropping out of the job market. Statistics Korea reported the number of people intending to seek jobs was 2.37 million in March, up 18.3% from a year earlier. Both the monthly figure and the year-on-year rise were the highest since the agency started to compile data in 2003.
- The average USD/WON exchange rate in April was 1223.07 won, a slight increase from the previous rate of 1216.54 won in March. South Korean airlines will not apply a fuel surcharge on international routes in April due to declining oil prices.

Outbound Travel Market

- Korea Tourism Organization (KTO) reported the number of outbound trips plummeted 93.9% year-on-year to 143,366 pax in March. The number of Korean visitor arrivals to the U.S. plunged to 10,570 pax in March, 87.55% less than for the same period last year.

Month	Departures	Growth (%)
January	2,513,030	-13.7%
February	1,046,779	-60.0%
March	143,366	-93.9%
Total	3,703,175	-52.9%

- International passenger traffic at Incheon International Airport (ICN) plummeted by 91.5% year-on-year to 648,000 pax in March. In terms of long-haul destinations such as the U.S. and Europe, the number of passengers decreased by 69.7% and 84.5% respectively during March compared to the

same period last year. The activity decline pushed the airport into first level emergency operations, involving closing facilities, boarding gates and runways.

- South Korea's two leading wholesalers - Hana Tour and Mode Tour - reported zero sales bookings for April, following an 80% drop in February and a 99% fall in March. The companies noted the number of outbound travelers fell by 98% in Q2, and there was a 99% drop in package sales during April. They both faced deficits in Q1 and expect to report annual deficits of US\$8.3 billion.
- South Korea's Ministry of Foreign Affairs (MOFA) extended its "special travel advisory" by one month to May 23. The government first issued the advisory on March 23 for all countries and territories over the spread of Covid-19, urging South Koreans to cancel or postpone overseas trips.

Competitive Environment

- Tahiti Tourism announced its new CEO will be Jean-Marc Mocellin and its Covid-19 recovery campaign will be called "Sunnier Days Ahead."
- Seychelles Tourism Board conducted a social media campaign to engage with potential visitors. The campaign started with photo supported messages from Tourism Seychelles using hashtags such as #staysafe, #dreamnow and #experienceseychelleslater. On April 15, a 24-hr video of the Seychelles was released.
- Tourism France Korea has released an encouraging message to industry partners to announce the resumption of its full service and operations.
- Visit Dubai released a #VisitDubaiLater video on its social media channels with exciting outdoor activity scenes to be enjoyed after the crisis and a positive message from its CEO.
- Hong Kong Tourism Board held a web conference for 1,500 industry participants on April 24 to share latest market updates and 3-phase (resilience, recovery and relaunch) Covid-19 recovery plans.
- Tourism Authority of Thailand (Visit Thailand) implemented a "Think of Thailand" sweepstakes event to motivate consumers to share destination travel memories and photos on social media channels.
- Major U.S. destinations such as New York, Los Angeles, Seattle, and San Francisco are planning to capture pent-up outbound travel demand during the summer peak season (June 1 to August 31) as Korean Air resumes or increases its services to the U.S. as follows:
 - Daily: ICN-LAX, ICN-JFK
 - 4-times weekly: ICN-ATL
 - 3-times weekly: ICN-SEA, ICN-ORD, ICN-SFO

Consumer Trends

- Consumer sentiment in South Korea hit an 11-year record low in April due to the economic reverberations of Covid-19. Bank of Korea reported the Composite Consumer Sentiment Index hit 70.8 in April, a 7.6-point drop from the previous month. It was the lowest result since the global financial crisis in 2008. (A reading below 100 indicates more pessimists over optimists).
- South Korean consumers have engaged in lavish, pent-up "revenge spending," according to a McKinsey study, as the market shows early recovery signs from the pandemic. Leading retailer Lotte

Department Store had year-on-year growth of 27.4% in sales of luxury watches and jewelry during its springtime promotion.

- Neilson Korea reported that South Korean e-commerce giant Coupang had a dominant 24.6% share of the local online retail market from January to early March. Its year-on-year growth of 18.1% saw its sales overtake eBay Korea. Daily orders through Coupang since the virus outbreak in late January have more than doubled in volume compared to the pre-virus period.
- With online shopping booming in South Korea during the pandemic, 89% of people in the 20-40 age range are shopping online for their parents, according to e-commerce company Auction. The most purchased items have been daily necessities/fresh food (28%) and health and medical product (20%).
- The total amount of payments linked to travel agencies and airlines dropped 91.3% and 77% respectively in March compared to the same period last year, according to analysis of 23.5 million transactions through Shinhan Card.

Travel Trends

- Leading travel agency Hana Tour appointed Mi-Sun Song from BCG as co-president of the group on March 26. She will lead strategic business development in collaboration with the other co-president, Jin-Gook Kim, who oversees sales.
- Korean Air has started to sell pre-paid flight tickets until May 31 to encourage travelers who are planning to travel abroad after the Covid-19 pandemic. The strategy allows travelers to make advance purchases and get discounts up to 15% for economy, prestige, and first-class seats once they decide to book flights for travel after July 1.
- Low-cost carriers are expanding flights and seat supplies on domestic services between Seoul and other major cities such as Jeju Island, Ulsan, and Busan. Jeju Air, the largest LCC, expanded the frequency of its Seoul to Busan route to 92 from April 3 to April 25 to meet consumer demand. Also, T'way Air introduced 4 flights a week from Cheongju to Jeju from April 25.
- Local hotels and resorts in South Korea's Gangwon Province forecast full occupancy for the April 30 to May 5 golden week holidays. In terms of accommodation, Gangwon province, Gyeonggi province and Jeju Island reported considerable growth compared to the same period last year, respectively 35%, 60% and 88%, due to travel being limited to domestic leisure locations.

Media Trends

- With online shopping booming amid the Covid-19 pandemic, department stores are jumping into so-called 'live commerce' by providing indirect shopping experiences for online customers to bolster weakened sales. The live-stream marketing is receiving positive feedback from sellers and customers as it enables exchanges via live chat features. Major department stores are launching their own live-streaming platforms or using webcast options on the likes of Naver and YouTube.
- E-commerce giants are growing bigger than their offline retail counterparts amid the pandemic. Coupang became the first Korean e-commerce company to earn over 7 trillion won (US\$5.75 billion) in annual sales and outstrip Lotte Mart, one of the three largest offline retailers. Coupang mainly attributed its revenue growth to people choosing to stay at home and shop online. It was helped by the nationwide availability of outstanding overnight and same-day delivery services.

- As OTT platforms have experienced subscription booms during the pandemic and lockdown, Netflix announced it added nearly 16 million new subscribers in Q1. It pulled in a record amount in monthly subscriptions in Korea in March, according to mobile app analytics company WiseApp. Koreans paid a total of \$29.6 million to Netflix for March subscriptions, a 10,547% hike on the same time last year.

Airlift

- Korean Air extended suspensions for another month to June 30 on flights for the ICN-HNL route (KE053) and ICN-NRT-HNL route (KE001).
- Asiana Airlines has suspended its flight services on the ICN-HNL route (OZ232) until May 31.
- Hawaiian Airlines stopped services on the ICN-HNL route (HA460) from March 2 to June 1.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

- Incheon International Airport Corporation (IIAC) forecast this year's international passenger traffic at South Korea's prime airport will fall a record 79.8% year-on-year to 14.26 million pax. The number of international flights at Incheon International this year is predicted to be down 74.6% to 92,000. The airport reported a year-on-year 97.3% drop in passenger traffic from April 9 to April 15 to a daily average of 4,000 pax. Meanwhile, passenger traffic for domestic destinations rose by 11.3% to 533,498 pax in the third week of March (16 to 22) compared to the first week (March 2 to 8), according to Air Portal. In response, local low-cost carriers have increased air services to Jeju Island to meet greater travel demand.
- Hyundai Development Co.'s planned acquisition of Asiana Airlines is likely to be delayed indefinitely. The potential owner left a stock acquisition deadline blank in its renewed statement on the transaction when airlines were hit by the pandemic travel ban and Asiana's financial structure became fragile.
- Korean Air will implement 6-month paid leave conditions for 70% of its employees from April 16 to October 15. Their income will be covered by the extended government subsidy to full-service carriers.
- A total of 4,914 travel agencies applied for Covid-19 tourism industry subsidies as of April 14, the Ministry of Culture, Sports and Tourism said. It is 16.7 times more than the number of subsidy applications received during the 2015 MERS crisis.
- Hana Tour kicked off its high-tech travel booking platform 'Hana Hub' on April 20 to meet the post-virus travel needs of South Koreans.

Activity Update

Travel Trade

- **Golf Promotion with Lotte JTB - Cancelled:** HTK has put all related Lotte JTB marketing activities on hold following cancellation by the LPGA of its 2020 Lotte LPGA Championship due to Covid-19. HTK had been pushing LPGA Golf Promotion (on-line and offline advertising, advertorials, social media, and branding campaigns for Hawai'i golf tour products) before the event was cut.
- **Luxury Hawai'i branding campaign with KALPAK - Suspended:** HTK has been promoting a premium Hawai'i initiative from November in collaboration with Korea's leading high-end tour operator

KALPAK, a subsidiary of Hanjin Travel. The campaign period has been extended to end of this year and will resume at the right time for the best outcome once the Covid-19 outbreak is resolved.

- **Airline co-op with Korean Air - Suspended:** HTK has indefinitely put on hold an online consumer branding campaign with Korean Air due to Covid-19. The development of the promotion page is on hold and the promotion will be revived in the post-virus period.
- **Airline/OTA promotion with Asiana Airlines:** HTK ran an online B2C Sustainable Hawai'i branding campaign in partnership with Asiana Airlines from February 10 to March 7. It enhanced awareness of Hawai'i as a leading responsible tourism destination in the Korean market. The promotion highlighted sustainable Hawai'i by showcasing (on the multiple media channels of OZ and HTK) its unique natural resources and the islands' rich cultural/historical heritages.
 - The promotion's two aspects involved: 1) Ticket Purchase Event, and 2) Participation Event. The events drew a total of 770 pax participation and generated 324 flight ticket sales. They also pushed a great deal of attention to the website of each local sponsor (Queen Kapiolani Hotel, Kualoa Ranch, USS Missouri Memorial) and their sustainable tourism activities. There were 22,582 Unique Visitors (UV) and 25,021 Page Views (PV) to Asiana Airlines' promotional webpage. Mobile app push notifications were also sent to 11,079 consumers on February 13 and 20.9% of receivers opened the promotional page. HTK also widely exposed the facility information and sustainable activities of each sponsor in the February issue of HTK Aloha E-Newsletter. It is sent to over 50K subscribers, including B2B partners and public consumers.
- **Busan Market Activation with Airlines - Postponed:** HTK has been collaborating with 3 airlines – Korean Air Busan, Asiana Airlines Busan, and Japan Airlines Busan – to develop co-op branding campaigns to increase awareness in Busan of Hawaiian Islands and Neighbor Islands. However, the partners have postponed the online branding campaign with the Busan offices of Hana Tour and Mode Tour due to the Covid-19 outbreak.
- **Aloha Care Package:** HKT sent out the thoughtful 'Aloha Care Package' to extend gratitude for their support to industry partners in airlines, travel agencies, media, and consumer/retail brands. It was accompanied by heartfelt messages of aloha and Kākou ("we are all in this together") and included a Hawai'i-themed gift and hygiene/healthcare items such as macadamia chocolate, Hawai'i water, and refreshing hand-gels.

Public Relations

- **'Share Aloha' video campaign:** HTK localized the 'Share Aloha' video with Korean subtitles to better represent the Hawaiian Islands' authentic aloha spirit as they wait to welcome visitors. The video has generated strong reactions, with 760 likes and 708 views, since being posted on April 20.
- **Consumer messages via social media channels:** HTK uploaded social media posts with photos of Waikiki and the 'Share Aloha' video on its owned Instagram, Facebook, and YouTube channels to deliver pertinent messages to Korean audiences.
- **HTK Crisis Management in response to COVID-19:** HTK has been following its real-time crisis management protocol by submitting daily HTA Covid-19 reports with timely media monitoring and content localization for Korean travelers.
 - **Media monitoring:** HTK has shared daily Covid-19 reports to update the South Korean market situation, including newly-confirmed cases, government responses, and details about the economy, airlift, travel industry, competing destination activity and public sentiment, etc.

- **GoHawaiiKR travel alert updates:** HTK has delivered up-to-date travel alerts to visitors and industry partners in local language, including HTA and state government official announcements, current Covid-19 status updates, hotel and attraction operations on the islands, and cancelled or postponed events.
- **Consumer messages via social media:** HTK has uploaded social media posts on its owned Instagram and Facebook channels to urge visitors to hold off their trips for the time being. It has reinforced 14-day self-quarantine rules on the islands using the designated hashtag #하와이 30 일간_잠시멈춤 (meaning “Postpone your visit to Hawai‘i for 30 days”).
- **Industry newsletter distribution:** HTK published the industry newsletter for front-line trade partners – airlines and travel agencies – to share consumer inquiry handling guidelines and express gratitude for past support and partnership via a video message from HTA.
- **Digital Director ‘Sustainable Hawai‘i’ Fam:** With the support of OVB and KVB, HTK successfully conducted a digital media Fam from February 27 to March 3 with three digital directors from key consumer magazines - Allure, Elle and Cosmopolitan. The 5N/7D “Sustainable Hawai‘i” themed visit to O‘ahu and Kaua‘i generated a total of seven pages in eco-friendly special March issues of the magazines. They will be supplemented by additional social media coverage in the post-virus recovery period. Participating partners included:
 - **Sponsors:** Ritz Carlton Residences Waikiki (full support), Hawaii Forest & Trail (media rate), Travel2Change (staff escort), Honolulu Museum of Art (full support), Tommy Bahama (full support), and Battleship Missouri Memorial (full support).
 - **Partners:** Kōloa Landing Resort (full support by KVB), Allerton Garden, Kaua‘i Coffee Farm and Captain Andy’s Sailing.
- **E-newsletter distribution:** HTK published the monthly e-newsletter to share latest destination updates and Covid-19 information with consumers. It included appealing content about Hawai‘i Food & Wine Festival’s new delivery platform Food-A-Go-Go, 3D Virtual Tour of ‘Iolani Palace, Waikīkī Aquarium’s online class for children and Polynesian Cultural Center’s online Hawaiian culture lecture.

Sales Activities

Sales Calls

Airline	Wholesaler/TA/TO/OTA	Other	Total
14	20	8	42

- **Summary of Key Sales Activities**
 - **Airlines:** HTK made regular virtual sales calls to airline partners to share up-to-date airlift information in response to Covid-19 and market trends as follows: Korean Air for airlift updates and follow-up on branding campaign; Asiana Airlines for airlift updates and follow-up on OTA branding campaign; Jin Air for airlift updates; Hawaiian Airlines for airlift update; KE/OZ/JL Busan to follow up on Busan market activation branding campaign.
 - **Travel Agencies:** HTK held regular non-direct meetings with Korea’s leading wholesalers, retailers, OTAs and receptive operators to share current market details and check booking momentum for Hawai‘i.
 - **Others:** HTK cultivated working relationships with industry partners from Hawai‘i or local hotels, transport operators, attractions, and communities to share market trends and intelligence.

Responsible Tourism Update

Hawaiian Culture

- HTK has maintained a dry and neutral tone in promoting Hawaiian languages and HCC events in the Korean market via the monthly Aloha E-Newsletter. In the March issue, HTK featured the sustainable policies of HCC, Korean audio tour at 'Iolani Palace, and the Hawaiian expression *kai* (ocean) to help Korean audiences become familiar with Hawaiian culture. In the April issue, HTK featured Hawaii Virtual tours to Volcano National Park and Honolulu Museum of Art, and the Hawaiian expression *Kākou* (all of us: we are in this together) to help Korean audiences become familiar with Hawaiian culture.
- HTK's official Instagram covered local Hawaiians' beloved musical instrument, the ukulele, by introducing (with photo) its origins and popularity.
- Aloha E-Newsletter's March edition introduced the hula dance form, its core values and deeply rooted history within Hawaiian culture, emphasizing that *hula* portrays the words of *oli* or *mele* in dance.

Nature Resources

- HTK's official Instagram introduced Kaua'i's coffee tastes, origin, and popularity on March 5, 2020.
- The official Instagram pitched Hawai'i as a leading responsible tourism destination on March 10 by featuring government actions to ban sale of sunscreens containing reef-damaging chemicals oxybenzone and octinoxate from 2021.

Hawai'i Tourism Taiwan

2020 Monthly Leisure Marketing Report – March/April

Market Intelligence/Market Conditions

Economy

- Taiwanese manufacturing industry with business partners in China is affected by the outbreak of COVID-19 in Q1. However, with the recovery of Chinese economy, the companies restarted the production line and resumed business with Chinese counterparts. On the contrary, industries with European and North American partners are affected later in Q2 when the pandemic developed in these markets.
- A big part of Taiwan's tourism industry depends on inbound tourism. In light of COVID-19, Taiwan's border was closed to foreign visitors. Hence, revenue of hotels and restaurants across Taiwan are affected and some are forced to close down with no income.

Outbound Travel Market

- Due to the continuous spread of COVID-19, the restrictions on direct cross-strait flights and the ban on air transits through Taiwan are extended until further notice.
- The travel bans to suspend all inbound and outbound group tours imposed on Taiwanese travel agencies are extended to the end of May.
- China Airlines has decided to suspend its Taipei – Honolulu direct flights between March 25 and May 31. Total cancellation is 29 flights or 8,874 seats.

Competitive Environment

- A "Travel Bubble" between New Zealand and Australia is under discussion given the slowing down of COVID-19 spread. The two governments are considering to open their borders to quarantine-free mutual citizens if the pandemic is to be contained. The governments are also reviewing the possibility of extending the "bubble" to Taiwan, Hong Kong and Pacific islands if the Travel Bubble mutual travel is well managed.

Consumer Trends

- According to Kantar Taiwan, 39% of Taiwanese surveyed had their daily lives disrupted by COVID-19. 42% tend to shop more online than in retail stores due to the pandemic and 55% shop for sanitizing products.
- To prevent transmission of COVID-19 in crowded places, many Taiwanese people prefer to spend leisure time outdoors. Picnic and camping are being popular when the weather gets warmer. The trend also urges the sales of outdoor products and attires.

Travel Trends

- A popular OTA in Asia, Klook offered food order service from up to 170 restaurants in Taiwan, including starred hotels, buffets, hotspots and tea shops. This service marks the difference of Klook from other OTAs; however, food delivery is not available unlike Food Panda and Uber Eats.
- Working with Council of Agriculture, Taiwan's leading wholesale travel agency Lion Travel Group has started its transformation from tourism to living and wellbeing. Lion Travel Group owns 5 restaurants in Taipei offering farm-to-table dishes. Consumers can also order produce and flowers from Taiwanese farmers via Lion's e-commerce platform and pick up from its retail stores nationwide. Lion Travel Group aims to build more cross-industry partnerships with different councils in the future.

Media Trends

- Since the outbreak of COVID-19, the time people spend at home is 2 hours longer than before. Hence, subscription for Multi-channel Network and over-the-top services have increased tremendously. Sales for merchandises related to online games or video games such as Nintendo Switch have also increased.

Airlift

- Given the continuous spread of COVID-19 worldwide, China Airlines has decided to suspend its Taipei – Honolulu route from March 25 to May 31. A total of 29 flights or 8,874 seats are affected.
- For a 3-month period from May to July, China Airlines employees will only be working on a 4-day week. At the same time, the salary of China Airlines employees will be cut down by 15% to 25% depending on the individual staff's rank.
- Taiwanese air carriers China Airlines and EVA Air each has signed a contract with Bank of Taiwan for a 2-year loan of NT \$20 billion (US \$667 million) as a relief to the COVID-19 crisis.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

- Taiwan's government has imposed travel restrictions to ban outbound and inbound group travels from March 19 to May 31 in light of the COVID-19 pandemic. Travelers coming back from abroad must undertake a mandatory 14-day quarantine. As the policies kick in, travelers from Taiwan have cancelled or suspended their outbound trips, including trips to Hawai'i.
- As announced by Hawai'i State Governor David Ige, now is not a good time to welcome visitors to Hawai'i in light of the COVID-19 pandemic. HTT advised all travelers to follow the travel restrictions and not to visit The Hawaiian Islands during this period.

Activity Update

Travel Trade

- HTT has been in close contact with trade partners in Taiwan to monitor the situation of the COVID-19 development in Taiwan and around the world.
- An internal training was provided to Friendship Tours at its head office. Participants included the Director of Long-Haul Department and the sales team servicing direct consumers at various stores across Taiwan. During the training, introduction of The Hawaiian Islands, interisland flights, and other trade resources were shared.
- Invited by Taipei Association of Travel Agents, Hawai'i Tourism Taiwan conducted 3 educational trainings for travel agents in Taipei on April 10, 16, and 20. The training program aims to empower travel agents to overcome challenges resulted from the COVID-19 crisis. Hawai'i being one of the key destinations for Taiwan's outbound tourism, HTT is invited as one of the presenters. During the trainings, HTT introduced features of the 6 Hawaiian islands with iconic attractions, HTA's websites and digital resources, as well as the Hawai'i Destination Expert Training program. Each training session was attended by 160 travel agents from various companies, totaling to 480 people in attendance.

Public Relations

- The press release "Aloha From Our Home To Yours" announced guidelines from the Hawai'i Governor David Ige to postpone trips to Hawai'i and the mandatory 14-day quarantine for all visitors and residents entering the state. It was distributed to 800 Taiwan database on March 24. The recipients include Media (Social Media Influencers, Digital, Print, Broadcast), Trade (OTAs, Branded Travel Enterprises, Wholesalers, Travel Agencies), Airlines, Cruise Lines, Car Rentals and MCI Intermediaries.
- Social Influencers & Vloggers FAM serving to increase the awareness of environmental protection in conjunction with HTT's Initiative 1 – Malama 'Āina is postponed due low travel sentiments and travel restrictions imposed by governments at this moment.
- HTT has paused all paid and original PR and social media releases due to the COVID-19 pandemic. However, HTT continues to monitor the market conditions and will work with HTA to keep Taiwan market updated of The Hawaiian Islands on culture, natural resources, and the community once the crisis is at ease.

Sales Activities

Sales Calls

Airline	Wholesaler/TA/TO/OTA	Other	Total
2	8	6	16

- HTT continues to monitor the COVID-19 developments with trade partners such as Lion Travel, Cola Tour, SET Tour and Phoenix Tours to understand how the industry is affected by the crisis. Resulted by lockdowns in overseas countries and international travel bans, travel agencies are experiencing a low period. As a result, many agents are taking personal leave or no-pay leave during this period.
- Due to internal changes of staff salary cuts and management changes, China Airlines has no plan to explore partnership with tourism boards or travel agencies. However, China Airlines expects to work with HTT to reboot the travel market for Hawai'i when the pandemic is controlled and people can travel again.

- Taiwan's major travel trade media – Travel Rich, Travel Trend News and Xin Media have suspended its print magazine publications in April. Instead, online articles are released periodically to feature travel news in the market. The media have no specific plans to resume print publications currently.

Responsible Tourism Update

Hawaiian Culture

The Hawai'i culture is introduced to travel agents at the training seminars hosted by Taipei Association of Travel Agents.

Nature Resources

HTT shared the beauty of Hawai'i's nature resources and responsible tourism with travel agents at Taipei Association of Travel Agents trade trainings.

Community

By playing the ShareAloha video at Taipei Association of Travel Agents trade trainings, the travel agents were able to understand Hawai'i's community and true meaning of aloha.



Group Sales Status Report – March and April 2020

OVERVIEW – March 2020

The travel industry is in a period of unprecedented disruption amid the global outbreak of COVID-19, and Meetings, Conventions, and Incentives (MCI) are no exception. Huge swathes of events have been postponed, cancelled, or moved online. Convention centers in major cities across the world — including New York City, London, Madrid, and São Paulo — are being converted into field hospitals and medical facilities for coronavirus patients to alleviate the strain on hospitals. Likewise, some hotels have contracted with government or healthcare entities to house patients with mild to moderate symptoms of the virus who do not have a place to self-isolate. For planners, this may be an issue for future events where groups may be hesitant to stay at hotels used for COVID-19 relief after the virus is under control.

Projections for when the travel industry will begin to recover are a moving target, as the trajectory of the outbreak has yet to reach its peak in the U.S. But current signs indicate that business travel and the MCI industry will be key players in spurring recovery for airlines, hotel, and the travel industry as a whole. In a recent Harris Poll, almost 20 percent of Americans surveyed said it would take them four to six months to fly again following the news of the virus flattening. Conversely, a Global Business Travel Association survey that was fielded at the same time as the Harris Poll indicates that business travelers are more optimistic than leisure travelers, with 40 percent of companies expecting business travel to resume in three months' time. Northstar Meetings Group's weekly survey tracking planners' experience with event cancellations and rescheduling indicates that one in four planners (26.5%) of planners surveyed will reschedule or plan to hold future meetings in July or August at the earliest, while 15.7 percent indicated September and more than one out of five (21.3%) cited Q4 2020. Although many businesses may get more comfortable with conducting meetings virtually, Christopher Anderson, a professor of business at Cornell University's Hotel School, expects the desire for in-person dealings will help spur airlines' recovery as people look to get back to business and create opportunities.

That being said, the range of competitive destinations for leisure or business travel is expected to look very different compared to pre-COVID-19 travel. Airlines are suggesting they will become smaller coming out of the pandemic. According to Melissa Biggs Bradley, CEO and Founder of boutique travel planning company Indagare, it is unlikely that the smaller regional areas are going to have the same kind of flight lift that they had in early 2020 for another 10 years as airlines are likely to cut routes. As a result, flying may not be as frequent or easy as it has been in the past. This is likely to affect smaller, regional destinations more than established markets.

OVERVIEW – April 2020

Many industry leaders are predicting leisure travel will drive the industry's overall recovery, despite some perceptions that business travel would rebound quicker than leisure. In a recent TripAdvisor webinar, Adam Sacks of Tourism Economics predicted that business and group travel will lag due to low corporate cash/profits as well as travel restrictions and government policy. MMGY's Travel Intentions Pulse Survey (TIPS) indicates that business travelers feel safer traveling than leisure travelers, and many corporate employees have been forced to adapt to a new work-from-home, social-distancing world. It is likely that this new technology-based approach will stick around post pandemic, which could cut the need for business travel. This is evidenced by Zoom's exponential growth, which reported a growth of its user numbers from 10 million to 200 million in just the last three months. Despite this existential threat to the meetings industry, the vast majority of meetings professionals believe it is only temporary. According to a new Professional Convention Management Association (PCMA) survey, while 43 percent of planners believe the rise in the use of digital-event technology will cannibalize face-to-face attendance at their events in the next three months, only 4 percent believe this will still be the case in 2021.

Future forecasts and sentiment research indicate that large gatherings will suffer in the next six to nine months, at the very minimum. After an initial wave of postponements between March and June, the industry is now seeing an increase in postponements of events originally scheduled for July and September. Gatherings of 250+ individuals are still under strong scrutiny by governments and disease control agencies. A similar degree of attention will most likely be dedicated to large meetings as well. As uncertainty about travel restrictions and lockdowns persist, event planners can only look at the fourth quarter as a safe bet for 2020. Size and travel will continue to be the two major risk factors both countries and attendees look at when evaluating the risk of attendance. Long-distance and international travel will be perceived as major risk factors as there is no (perceived) control over what another state or country is doing to prevent the spread of the virus. This leaves space only for smaller, local initiatives to persist. This is supported by findings in PCMA *Convene's* survey, in which 47 percent of planners and 63 percent of suppliers stated that they believe that smaller local and regional events will thrive before national and international groups gather.

SALES PRODUCTION (in the month for any year)

**Table 1: Total HVCB Sales Production
March 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year
Definite & Assist-Definite	8,920	18,739	-52%	20,132	62,425	-68%
Tentative & Assist-Tentative	67,632	138,900	-51%	191,408	333,500	-43%

April 2020

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year
Definite & Assist-Definite	9,639	30,852	-69%	29,771	93,277	-68%
Tentative & Assist-Tentative	34,660	54,143	-36%	226,046	387,643	-42%

Merging of Hawai'i Convention Center data with HVCB's Simpleview database continues. The ongoing auditing and database cleansing may result in changes to previously reported figures.

**Table 2a: HVCB Citywide Sales Production
March 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite	0	0	N/A	0	15,490	-100%	TBD	TBD
New to Hawai'i	0	0	N/A	0	5,320	-100%	TBD	TBD
Tentative	11,150	49,955	-78%	16,157	110,725	-85%	TBD	TBD
MCI								
Definite	0	0	N/A	0	15,230	-100%		
New to Hawai'i	0	0	N/A	0	5,320	-100%		
Tentative	11,150	49,355	-77%	16,157	109,865	-85%		
Non-MCI								
Definite	0	0	N/A	0	260	-100%		
New to Hawai'i	0	0	N/A	0	0	N/A		
Tentative	0	600	-100%	0	860	-100%		

Merging of Hawai'i Convention Center data with HVCB's Simpleview database continues. The ongoing auditing and database cleansing may result in changes to previously reported figures.

COMMENTS

Market Conditions

The market conditions and industry trends for Hawai'i citywide business mirror the impact COVID-19 has had on similar West Coast citywide destinations. CY 2020 was highlighted as one of Hawai'i's best years for events at the Hawai'i Convention Center (HCC). However, beginning in March, Hawai'i experienced the nationwide pattern of major cancellations due to attendee fear of COVID-19 contraction and mandated travel restrictions (domestic and international). Five 2020 HCC citywide groups have cancelled or are in the process of cancelling within 150 days of their start dates -- a major international SMERF convention, Immunology, Association for Computing Machinery, Goldschmidt and Varsity Spirits. Efforts are focused on rebooking these cancelled citywide groups for future years.

Sales Production Analysis

Negative variance for month-to-date (MTD) and year-to-date (YTD) Sales Production to Goal reflect the need to restructure and reposition citywide sales for future growth. Despite COVID-19 setbacks, the Citywide 90-day Assessment continues and is in the last 30 days of providing final recommendations. These recommendations will focus on deployment, structure, processes and implementation of new strategy to maximize future business growth for the Hawai'i Convention Center.

Highlight of Key Definites

- None to report for March.

Highlights of Any Key Tentatives

- Convention — medical association, October 2027 (10,650 room nights)

Highlights of Any Key Cancellations

- Convention – Confidential SMERF, June 2020 (52,383 room nights)
- Convention – Immunology, May 2020 (7,395 room nights)
- Convention – Association for Computing Machinery, April 2020 (4,167 room nights)
- Sports – Varsity Spirit Championships, June 2020 (292 room nights)
- Convention – Goldschmidt, June 2020 (5,100 room nights) *pending cancellation*

**Table 2a: HVCB Citywide Sales Production
April 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite	0	95	-100%	0	15,585	-100%	TBD	TBD
New to Hawai'i	0	0	N/A	0	5,320	-100%	TBD	TBD
Tentative	3,434	11,977	-71%	19,591	122,702	-84%	TBD	TBD
MCI								
Definite	0	95	-100%	0	15,325	-100%		
New to Hawai'i	0	0	N/A	0	5,320	-100%		
Tentative	3,434	1,407	144%	19,591	111,272	-82%		
Non-MCI								
Definite	0	0	N/A	0	260	-100%		
New to Hawai'i	0	0	N/A	0	0	N/A		
Tentative	0	10,570	-100%	0	11,430	-100%		

Merging of Hawai'i Convention Center data with HVCB's Simpleview database continues. The ongoing auditing and database cleansing may result in changes to previously reported figures.

COMMENTS

Market Conditions

Major citywide destinations continue to see planners discussing the cancellation of Q4 2020 conventions due to COVID-19 uncertainty. Meeting customers need clarity on State and Local definitions of Group Gatherings and Social Distancing Space Requirement Guidelines in order to move forward with future meetings. Additional customer feedback reveal that Q1 and Q2 2021 booked meetings are under review to be moved due to COVID-19.

Sales Production Analysis

Meet Hawai'i Citywide Sales & Services has been impacted by a recent staff reduction (60%) and budget cut (40%). Meet Hawai'i's Single-Property Sales Team will handle new citywide inquiries during citywide staff reduction transition. Citywide sales focus is to rebook 2020 cancelled conventions due to COVID-19 in CY 2021 and 2022.

Highlight of Key Definites

- None to report for April.

Highlights of Any Key Tentatives

- Convention — scientific association, August 2025 (3,434 room nights)

Highlights of Any Key Cancellations

- Convention – scientific association, June 2020 (5,100 room nights)
- Convention – engineering association, June 2020 (6,842 room nights)
- Convention – medical association, October 2020 (1,600 room nights)

**Table 2b: HVCB Single Property Sales Production
March 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite	5,911	10,251	-42%	11,643	32,708	-64%	TBD	TBD
New to Hawai'i	5,815	6,506	-11%	10,456	16,156	-35%	TBD	TBD
Tentative	43,595	77,377	-44%	150,515	194,343	-23%	TBD	TBD
MCI								
Definite	5,911	10,251	-42%	11,443	32,688	-65%		
New to Hawai'i	5,815	6,506	-11%	10,256	16,136	-36%		
Tentative	43,379	75,313	-42%	148,317	189,475	-22%		
Non-MCI								
Definite	0	0	N/A	200	20	900%		
New to Hawai'i	0	0	N/A	200	20	900%		
Tentative	216	2,064	-90%	2,198	4,868	-55%		

COMMENTS

Market Conditions

All publications are currently presenting creative meeting options and virtual meetings as the new norm of getting information out in lieu of conferences not taking place. *Meetings Today* published an article highlighting how CVBs keep customers informed of COVID-19 impact in their areas through crisis communication by gathering the most accurate and up-to-date information regarding the outbreak threat. Just how this “digital transformation” will impact the industry post-COVID-19 remains to be seen. Embracing technology, the team has assisted with several virtual site inspections with hotel partners.

Sales Production Analysis

Definite production during March is understandably and severely down by -42 percent in comparison to the same time last year. While not on pace to last year, a bit of hope is seen in new tentatives of 43,595 room nights. The team continues to receive requests for new business, while juggling requests for date changes and supporting the hotels who now have furloughed sales teams.

Highlights of Any Key Definites

- Convention – medical association, January 2025 (3,996 room nights)
- Incentive – consumer products corporation, January 2024 (1,613 room nights)

Highlights of Any Key Tentatives

- Incentive — business services corporation, April 2021 (6,992 room nights)
- Convention — consumer products corporation, June 2022 (4,132 room nights)
- Incentive — confidential group, October 2020 (3,630 room nights)
- Incentive — distribution corporation, January 2022 (2,627 room nights)

Highlights of Any Key Cancellations

- Convention – high tech corporation, March 2020 (4,910 room nights)
- Convention – scientific association, March 2020 (825 room nights)

Advertising Efforts

- Meetings, conventions and incentives (MCI) February Paid Media Recap
 - None to report for February.

Public Relations Efforts

- Activity highlights include:
 - Drafted and disseminated a news release announcing John Reyes as HVCB’s Senior Vice President of Convention Sales and Marketing. It was distributed to over 45 editors and senior editors of key meeting and trade publications including *Smart Meetings*, *Meetings & Conventions*, *Meetings Today*, *Meetings + Incentives*, *Trade Show Executive*, *Leisure Group Travel*, *Convene Magazine*, *Travel Agent*, *Trade Show Executive*.
 - Coordinated interview with *Hawai’i Hospitality’s* Brett Alexander-Estes, John Reyes, and Mary Neister for a Spring issue feature profiling the Hawai’i Convention Center.
 - Carolyn Blackburn, *Meetings Today* – Provided state-wide recommendations for a Hawai’i editorial feature themed the "Coolest Offsite Venues in Hawai’i" for corporate group gatherings. The feature is scheduled to be published in the April 2020 issue.
- Media Coverage Highlights:
 - “Destination Guide, Hawai’i” – *Meetings & Conventions*
 - “John Reyes Named HVCB’S Senior Vice President, Chief MCI Sales Officer” – *The Meeting Magazines.com*
 - “HVCB names new senior vice president” – *Travel Weekly*
 - “Latest Report on Hawai’i Meetings, Conventions, Incentives (MCI) Tourism Market Analysis & 2022 Forecast Research Study” – *Industry Daily Observer*

- January Impressions and Publicity Values for Articles that included Hawai’i:

February <u>Impressions</u>	February <u>Publicity Values</u>
Print: 1,777,620	Print: \$265,108.92
Online: 142,148,349	Online: \$79,237.57
Broadcast: 2,078,798	Broadcast: \$334,084.71
Total: 146,004,767	Total: \$79,237.54

**Table 2b: HVCB Single Property Sales Production
April 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite	9,639	21,096	-54%	21,282	53,804	-60%	TBD	TBD
New to Hawai'i	8,817	13,351	-34%	19,273	29,507	-35%	TBD	TBD
Tentative	31,226	36,815	-15%	181,719	231,158	-21%	TBD	TBD
MCI								
Definite	9,489	21,096	-55%	20,932	53,784	-61%		
New to Hawai'i	8,667	13,351	-35%	18,923	29,487	-36%		
Tentative	29,089	36,430	-20%	177,384	225,905	-21%		
Non-MCI								
Definite	150	0	N/A	350	20	1650%		
New to Hawai'i	150	0	N/A	350	20	1650%		
Tentative	2,137	385	455%	4,335	5,253	-17%		

COMMENTS

Market Conditions

Roger Dow, President and CEO of the U.S. Travel Association, provided the following highlights in *Meetings Today*:

- The economic impact on the travel industry from COVID-19 will be nine times greater than 9/11.
- By the end of April, declines in travel will cause a third of all the jobs lost in the U.S.
- Travel spending losses are on track to top half a trillion dollars by the end of 2020.
- 90 percent of travelers surveyed had some type of travel or travel-related activity planned prior to the COVID-19 outbreak and 80 percent of those either canceled or postponed those plans, according to survey data from MMGY Travel Intelligence

The Meet Hawai'i Single Property team participated in various educational webinars discussing the COVID-19 impact to the industry. During this time of furloughs and temporary closures, the team has served as a conduit between customers and hotel partners, supporting and handling the fluid situation of cancellations and the rebooking of postponed programs.

Sales Production Analysis

Production has taken a drastic hit compared to same time last year due the pandemic. Despite the current climate, the team produced over 9,000 definite room nights and an impressive 31,000 tentative room nights added to the pipeline. It is worth noting that the tentative year-to-date production is only 21 percent behind same time last year, a hopeful signal of a recovery for Hawai'i's stand-alone meetings business.

Highlights of Any Key Definites

- Convention – educational association, November 2023 (4,058 room nights)
- Incentive – insurance corporation, October 2020 (3,621 room nights)
- Meeting – medical association, November 2021 (612 room nights)

Highlights of Any Key Tentatives

- Convention – confidential group, January 2022 (4,000 room nights)
- Incentive – confidential group, October 2022 (3,300 room nights)
- Convention – business services corporation, October 2024 (2,110 room nights)
- Convention – real estate corporation, September 2023 (2,110 room nights)
- Convention – business services corporation, October 2025 (2,110 room nights)

Highlights of Any Key Cancellations

- Incentive – high tech corporation, April 2020 (4,114 room nights)
- Meeting – environmental association, April 2020 (759 room nights)

Advertising Efforts

- Meetings, conventions and incentives (MCI) March Paid Media Recap
 - *Meetings Today*, Hawai'i insert – Full Page Ad – 55,000 impressions.

Public Relations Efforts

- Activity highlights include:
 - Carolyn Blackburn, *Meetings Today* – Provided Kathy Anchors-Budd and Tiffany Cohen's contacts to Carolyn for Planner's Perspective O'ahu & Kaua'i section for the June issue.
 - Emily Carrus, *Successful Meetings* – Scheduled a phone interview with Mary Neister for Hawai'i's *Successful Meetings* spring insert postponed for the July/August issue.
 - Suspended all dissemination of information on behalf of Meet Hawai'i and the industry partners, as the status of offerings, amenities, programs, facility updates etc. are uncertain and in flux.
- Media Coverage Highlights:
 - "Meeting & Convention Facilities" – *Pacific Business News* – Mar. 30, 2020
 - "Island Gatherings" – *Meetings Today* – Apr. 1, 2020

- March Impressions and Publicity Values for Articles that included Hawai'i:

March	March
<u>Impressions</u>	<u>Publicity Values</u>
Print: 1,336,953	Print: \$ 4,913,286.46
Online: 2,234,538,271	Online: \$ 1,763,787.91
Broadcast: 723,119	Broadcast: \$ 35,557.42
Total: 2,236,598,343	Total: \$ 6,712,631.79

**Table 2c: Hawai'i Tourism Canada Single Property Sales Production
March 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	155	-100%	0	155	-100%	TBD	TBD
New to Hawai'i	0	155	-100%	0	155	-100%	TBD	TBD
Tentative & Assist-Tentative	1,973	310	536%	4,513	1,357	233%	TBD	TBD
MCI								
Definite & Assist-Definite	0	155	-100%	0	155	-100%	TBD	TBD
New to Hawai'i	0	155	-100%	0	155	-100%	TBD	TBD
Tentative & Assist-Tentative	1,973	310	536%	2,263	1,357	67%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	2,250	0	N/A	TBD	TBD

COMMENTS

Market Conditions

Corresponding to the national forecast produced by the Conference Board of Canada, it is assumed that there will be a surge in COVID-19 cases in North America in Q2 and the virus will be under control by the end of Q3. An element of pent-up demand is assumed in that there will be a rebound in travel demand once restrictions are lifted. Some transfer of demand in trip destination is also assumed. The numbers are rough estimates based on historical monthly arrivals and current capacity data and will be updated as trip data and other new information becomes available. Current estimates suggest that outbound travel activity will decline -6.4 percent throughout the first half of 2020, with the bulk of the impact felt in Q2.

Sales Production Analysis

March started off with five strong RFPs. As such, Hawai'i Tourism Canada (HTCanada) achieved 47.5 percent of its semi-annual (January-June) tentative/assist-tentative room night goal. However, things came to a halt come mid-March due to continuous updates pertaining to COVID-19. These five RFPs constituted 1,973 tentative/assist-tentative room nights, four set to take place within the first six months of 2021, and one scheduled for late October 2021. There are still several groups that are tentative but are hoping to close soon. Planners have shown no signs of cancelling travel at this time for these groups. HTCanada continues to reach out to the planners of these tentative groups and will update in Simpleview accordingly.

Highlight of Key Definites

- None to report for March.

Highlight of Key Tentatives

- Incentive – automotive corporation, February 2021 (412 room nights)
- Convention – financial corporation, April 2021 (861 room nights)
- Meeting – labor union association, June 2021 (30 room nights)
- Meeting – technology association, October 2020 (510 room nights)
- Meeting – financial corporation, May 2021 (200 room nights)

Advertising and PR Activity

- None to report for March.

**Table 2c: Hawai'i Tourism Canada Single Property Sales Production
April 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	925	-100%	0	1,080	-100%	TBD	TBD
New to Hawai'i	0	925	-100%	0	1,080	-100%	TBD	TBD
Tentative & Assist-Tentative	0	408	-100%	4,513	1,765	156%	TBD	TBD
MCI								
Definite & Assist-Definite	0	925	-100%	0	1,080	-100%	TBD	TBD
New to Hawai'i	0	925	-100%	0	1,080	-100%	TBD	TBD
Tentative & Assist-Tentative	0	408	-100%	2,263	1,765	28%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	2,250	0	N/A	TBD	TBD

COMMENTS

Market Conditions

Impact of COVID-19 on Travel Activity

- Outbound service on Canadian carriers has now been reduced by 3.5 million direct seats throughout the first half of 2020. Almost all of this decline is taking place in Q2. While minor increases are currently being reported for June, massive declines have occurred in April and May. So far, Canadian carriers have decreased service by 94.2 percent in April and by 54.9 percent in May for a total loss of 3.3 million seats compared to 2019.
- Current reporting indicates that direct seat capacity from Canada to all U.S. destinations will decline -14.9 percent this summer to 8.3 million. Every state with service will see a reduction in lift, but almost all of the change is scheduled for May. Of those planning a trip to the U.S. in the coming months, 55 percent plan to fly to their destination, either directly (34%), or with a connection or departure stateside (21%).

Sales Production Analysis

Hawai'i Tourism Canada (HTCanada) has no production to report for the month of April amid the COVID-19 pandemic. Some positive news is that active tentative leads have not cancelled and are planning to “wait and see” how the COVID-19 pandemic unfolds down the line.

Advertising and PR Activity

- None to report for April.

**Table 2d: Hawai'i Tourism China Single Property Sales Production
March 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	474	-100%	600	1,636	-63%	TBD	TBD
New to Hawai'i	0	474	-100%	600	1,636	-63%	TBD	TBD
Tentative & Assist-Tentative	2,240	521	330%	2,840	4,605	-38%	TBD	TBD
MCI								
Definite & Assist-Definite	0	0	N/A	0	690	-100%	TBD	TBD
New to Hawai'i	0	0	N/A	0	690	-100%	TBD	TBD
Tentative & Assist-Tentative	2,240	40	5500%	2,240	2,920	-23%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	474	-100%	600	946	-37%	TBD	TBD
New to Hawai'i	0	474	-100%	600	946	-37%	TBD	TBD
Tentative & Assist-Tentative	0	481	-100%	600	1,685	-64%	TBD	TBD

COMMENTS

Market Conditions

China Outbound Travel Market

Because of global epidemic outbreak of COVID-19, the airlines industry was hit severely since March. With the rise of imported coronavirus cases, China Civil Aviation Administration provided notice on March 26, 2020 for each domestic airline to maintain only one route to any country, and to also limit the number of flights to one per week. Similar rules were also set for international carriers on their flights to China. In summary, from March 23, 2020, 49 foreign airlines have suspended flights and 46 airlines had cancelled over 50 percent of their flights.

For China's tourism industry market, as the epidemic gradually comes under control, forward bookings for China domestic air travel show a dramatic rebound. China is seeing a significant increase in forward bookings for domestic air travel, according to a research report by travel agency Tongcheng-Elong and airline data provider Variflight. The lead time between flight bookings and departures has widened substantially since early March. Weekly bookings made during the February 27 to March 5 week for April flights rose by 77 percent, while bookings for June flights have jumped 250 percent, compared to the previous week.

Impact on Hawai'i:

Although Hawai'i remains under lockdown with no direct flights from China, China's MCI tourism industry is becoming active. Incentive group requests in Q4 2020 are active and Hawai'i Tourism China (HTC) is working with MCI agencies to provide destination proposals to prospective clients for accommodation and facilities quotation.

Sales Production Analysis

HTC proactively reached out to an MCI agent for a potential incentive group interested in coming to O'ahu in October 2020 for a total of 2,240 tentative/assist-tentative room nights. HTC will also continue to track lost business and/or programs postponed due to COVID-19 with the focus of bringing them to Hawai'i .

Highlight of Key Definites

- None to report for March.

Highlight of Key Tentatives

- Incentive – engineering group, October 2020 (2,240 room nights)

Highlight of Key Cancellations

- None to report for March.

Advertising and PR Activity

- None to report for March.

**Table 2d: Hawai'i Tourism China Single Property Sales Production
April 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	2,661	-100%	600	4,297	-86%	TBD	TBD
New to Hawai'i	0	2,661	-100%	600	4,297	-86%	TBD	TBD
Tentative & Assist-Tentative	0	200	-100%	2,840	4,805	-41%	TBD	TBD
MCI								
Definite & Assist-Definite	0	200	-100%	0	890	-100%	TBD	TBD
New to Hawai'i	0	200	-100%	0	890	-100%	TBD	TBD
Tentative & Assist-Tentative	0	200	-100%	2,240	3,120	-28%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	2,461	-100%	600	3,407	-82%	TBD	TBD
New to Hawai'i	0	2,461	-100%	600	3,407	-82%	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	600	1,685	-64%	TBD	TBD

COMMENTS

Market Conditions

China Outbound Travel Market – Global business travel expenditure increased by only 3.1 percent in 2019, the lowest growth rate since the economic crisis, according to the 2019-2020 Business Travel Market Management White Paper released by Trip.com Group's business travel unit Ctrip Corporate Travel on April 23. As the world's largest business travel market, China registered a declined growth rate of 5.9 percent last year, while the average annual growth rate in 2013-2018 was 11 percent.

Sales Production Analysis

Hawai'i Tourism China (HTC) has no production to report for the month of April amid the COVID-19 pandemic. HTC will also continue to track lost business and/or programs postponed due to COVID-19 with the focus of bringing them to Hawai'i .

Advertising and PR Activity

- None to report for April.

**Table 2e: Hawai'i Tourism Japan Single Property Sales Production
March 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	2,729	5,145	-47%	7,204	6,961	3%	TBD	TBD
New to Hawai'i	1,359	4,709	-71%	4,384	5,605	-22%	TBD	TBD
Tentative & Assist-Tentative	2,729	4,238	-36%	7,204	11,628	-38%	TBD	TBD
MCI								
Definite & Assist-Definite	2,729	5,145	-47%	7,204	6,961	3%	TBD	TBD
New to Hawai'i	1,359	4,709	-71%	4,384	5,605	-22%	TBD	TBD
Tentative & Assist-Tentative	2,729	4,238	-36%	7,204	11,628	-38%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD

COMMENTS

Market Conditions

Coronavirus Outbreak

- The COVID-19 continues to spread globally, creating significant strain on economies. Major events are being cancelled, along with meetings between firms. Workers are being asked to work remotely, with primary schools being closed, driving down consumption. As of April 1, there have been 2,178 confirmed cases, and 57 deaths have been confirmed in Japan. Entry restrictions have also been issued from 38 countries for Japan.
- Although Governor Ige's call for all visits to Hawai'i was not a ban on travel, Japanese firms had already considered the cancellation of MICE related business, resulting in various association meetings and events being cancelled, with immediate concerns being the cancellation fees. Organizers continue discussions with hotels and various venues to reach an agreement. Events such as the Honolulu Festival, Honolulu Ekiden, and Rotary International Convention have been confirmed as cancelled. The Rotary International Convention alone had 40,000 registered attendees.
- As of March 25, there were already cancellations and postponements summing to roughly 18,570 for Japanese group business to Hawai'i. Roughly 60 percent of leads were cancelled, with the remaining postponed. Inquiries from leads for 2021 have begun, but as organizers focus on support for cancelled leads, movement from the MICE market continues to be sluggish.
- Implementation of the mandatory 14-day quarantine, along with waiver of the U/L rule by airports has resulted in most flights connecting Japan and Hawai'i to be cancelled. Over 90 percent of scheduled flights were cancelled in efforts to mitigate spread of the COVID-19.

Economy

- Studies by Resona Research Institute forecast inbound tourism lost to result in a loss of 981.3 billion yen by June. Effects will be particularly strong in the Kansai region with loss of roughly 304.2 billion yen in the region alone. This indicates loss of inbound consumption by over 50 percent.
- The 2020 Tokyo Olympic and Paralympic games have been confirmed to be postponed by one year. Studies by Nisseikiso Research Institute speculated from 2014-2020, the Olympics contributed to GDP growth of close to 2 percent, with direct benefits to Tokyo alone summing to over 1.9 trillion yen. Although many benefits such as construction related investments have been actualized, the tourism, service and retail industries are likely to take significant hits.

5 Target Pillar Condition/Support

Incentive / Anniversary:

- The COVID-19 has halted all domestic and international travel in Japan. Inquiries for anniversary related incentive leads continue to be received as these are typically planned well in advance. However, regular incentive related travels have come to a standstill for all leads within 2020.
- Postponement of the Olympics may affect various groups to reconsider the hosting of incentive tours as they prepare for the influx of demand from the 2021 Olympics. Policies of the Japanese Government will continue to be monitored to effectively strategize group business for Hawai'i.

Edu-Tourism:

- Edu-tourism leads planned through August have been cancelled or postponed to the Fall onwards. Inquiries for leads in 2021 has risen but are limited. School related trips have come to a stop as PTAs are against school trips and study abroad programs.
- For schools that are repeat business to Hawai'i, materials from the Aloha Program youth exams are being utilized as study materials while they close. Hawai'i Tourism Japan (HTJ) is also proactively providing informational content to raise knowledge of Hawai'i amongst faculty while providing tools for students to utilize.

Sports:

- HTJ supported the friendly volleyball match between the University of Hawai'i and the Nippon Sport Science University. The 31 students and coaches were provided a valuable exchange opportunity through Volleyball and experienced their respective views on the sport, language and culture.

Entertainment:

- Numerous leads including concerts, fan events, and competitions are being cancelled, significantly impacting the industry. With activities such as the filming of music videos also being avoided, organizers are preparing for rebound demand once the COVID-19 subsides.
- HTJ has been working to secure a musician fan club event with potential to attract 2,000 pax. Use of the HCC for parts of the event is being encouraged. Availability is currently being checked.

Attendance Building:

- Currently preparing for the aforementioned fan club event and a large-scale incentive tour to utilize the HCC. Although organizers are leaning towards usage of facilities at hotels, HTJ is encouraging use of the HCC by sharing its various benefits. Tentative bookings have been made for HCC with 1,200 pax in January 2023.

Sales Production Analysis

In March, four definite leads were generated from the consumer products, real estate, manufacturing and food/restaurant industries. This allowed for a total 2,729 room nights to be secured in March. Two of the four assist-definite leads were new business to Hawai'i. However, due to the recent COVID-19 outbreak, three of the leads resulted in cancellations.

Highlight of Key Definites

- Meeting – manufacturing corporation, May 2020 (465 room nights)
- Incentive – real estate corporation, April 2020 (894 room nights)
- Incentive – consumer products corporation, May 2020 (995 room nights)
- Incentive – food/restaurants corporation, May 2020 (375 room nights)

Highlight of Key Tentatives

- Meeting – manufacturing corporation, May 2020 (465 room nights)
- Incentive – real estate corporation, April 2020 (894 room nights)
- Incentive – consumer products corporation, May 2020 (995 room nights)
- Incentive – food/restaurants corporation, May 2020 (375 room nights)

Highlight of Key Cancellations

- Incentive – real estate corporation, April 2020 (894 room nights)
- Incentive – consumer products corporation, May 2020 (995 room nights)
- Incentive – food/restaurants corporation, May 2020 (375 room nights)

Advertising and PR Activity

- None to report for March.

**Table 2e: Hawai'i Tourism Japan Single Property Sales Production
April 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	2,967	-100%	7,204	9,928	-27%	TBD	TBD
New to Hawai'i	0	1,867	-100%	4,384	7,472	-41%	TBD	TBD
Tentative & Assist-Tentative	0	1,467	-100%	7,204	13,095	-45%	TBD	TBD
MCI								
Definite & Assist-Definite	0	2,295	-100%	7,204	9,256	-22%	TBD	TBD
New to Hawai'i	0	1,195	-100%	4,384	6,800	-36%	TBD	TBD
Tentative & Assist-Tentative	0	795	-100%	7,204	12,423	-42%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	672	-100%	0	672	-100%	TBD	TBD
New to Hawai'i	0	672	-100%	0	672	-100%	TBD	TBD
Tentative & Assist-Tentative	0	672	-100%	0	672	-100%	TBD	TBD

COMMENTS

Market Conditions

Coronavirus Outbreak

- The Japan National Tourism Organization announced that outbound travelers for March declined by 85.9 percent to 272,700, the largest drop in travelers since collection of statistics began.
- Significant negative economic impacts from COVID-19 are expected with industry performance forecasted to drop 11.08 percent. This compounds with the consumption tax hike in October 2019. Overall growth for 2020 is forecasted at -3.09 percent.

Airlines

- As of May 4, most direct flights between Japan and Hawai'i are suspended through May 31, along with hotels being shuttered for similar durations.
- It is speculated that once COVID-19 settles down, airlift will remain at approximately 60-70 percent at most as consumers remain wary of COVID-19 conditions. Conferences and meetings will increasingly be shifted to online platforms, along with overall reduction in the amount of conferences and events, reducing demand.

Travel Agencies

- Through discussions with major wholesalers, which account for roughly 95 percent of the market, a tentative recovery phase of October has been set to discuss potential future B2B seminars and B2C events. Meetings continue to be held with relevant departments to develop safety measures and reestablish market trust.
- In conjunction with the Hawai'i Expo planned for October, B2B seminars and workshops will be held to facilitate a revitalization in group travel demand.

5 Target Pillar Condition/Support

Since Governor Ige's request for all travels to Hawai'i to be postponed in March, the group travel sector faced numerous cancellations. Instead of canceling leads altogether, many remain as tentative bookings. As of April 22, cancellations sum up to roughly 32,500 attendees from the group sector alone. Most cancellations originate from the incentive and edu-tourism segments. Leads have shown tendencies to result in cancellations as their 60-day cancellation deadline approaches.

Incentive/Anniversary & Edu-tourism:

- All leads through the end of June have been either canceled or postponed before cancellation fees were incurred. Cancellations are beginning to arise for leads from July.
- The emergency state declaration in Japan is causing travel agency staff to work from home, making them communicate with their clients on their own time. However, they are mostly busy handling cancellations and postponements.
- Some inquiries continue to be received for leads from October onwards.
- Edu-tourism leads have come to a complete standstill for 2020. Travel agencies will be shifting focus to acquiring leads from 2021.
- The Japanese Government is looking to implement a new system for public schools to start the school year in September as opposed to April. This will greatly impact future edu-tourism segment initiatives.

Sports & Entertainment:

- The global spread of COVID-19 is prompting the cancellation of most sports and entertainment related events. With the end of COVID-19 not being apparent, many events are shifting from postponement to cancellation.

Attendance Building:

- As can be seen from the cancellation of the Rotary International Convention, most conventions holding base in the West continue to be canceled. Even if COVID-19 subsides in Hawai'i, it will also be required that conditions settle down in other destinations where attendees travel from. Moving forward, the sector is likely to begin implementing technology, such as virtual conferences.
- The fan club event planned in 2021 and 1,200 pax incentive lead in 2023, set to utilize the HCC have not indicated intents to cancel as dates are still far away.

Sales Production Analysis

Hawai'i Tourism Japan (HTJ) has no production to report for the month of April amid the COVID-19 pandemic.

Highlight of Key Cancellations

- Meeting – manufacturing corporation, May 2020 (465 room nights)

Advertising and PR Activity

- None to report for April.

**Table 2f: Hawai'i Tourism Korea Single Property Sales Production
March 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	1,692	-100%	247	3,737	-93%	TBD	TBD
New to Hawai'i	0	1,420	-100%	130	2,615	-95%	TBD	TBD
Tentative & Assist-Tentative	1,125	1,836	-39%	1,372	3,359	-59%	TBD	TBD
MCI								
Definite & Assist-Definite	0	1,692	-100%	247	3,737	-93%	TBD	TBD
New to Hawai'i	0	1,420	-100%	130	2,615	-95%	TBD	TBD
Tentative & Assist-Tentative	1,125	1,836	-39%	1,372	3,359	-59%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD

COMMENTS

Market Conditions

- **Coronavirus Outbreak Key Update in Korea:**
 - As of April 3, South Korea had a total of 10,062 confirmed cases of COVID-19 infections, with 174 deaths. 6,021 patients have recovered and 3,867 are receiving treatment.
 - Effective April 1, South Korea will enforce a two-week mandatory quarantine on all entrants from overseas regardless of departure destination and nationality. Visitors without local addresses are to stay in government-designated facilities at their own expense.
 - The South Korean government will grant "emergency disaster relief money" to many of the country's households in a one-off stimulus program to help with the economic impact of the coronavirus crisis. Under the scheme, 1 million won (\$820) would be given to a four-person household, of which gross income stays at or below 70 percent of the total.
- **Airlift Updates:** Korean Air will slash the service of ICN-HNL route (KE053) from April 4 to April 30 by reflecting the state's strict measures on visitors and current travel slump. Asiana Airlines (OZ 0231) will halt its daily service to Hawai'i from April 1 to April 29, following 14 occasional flights during March for essential travel demands. Hawaiian Airlines (HA460) will keep its suspension period until April 30 as initially announced.
- **Agency Updates:** Travel agencies are set to resiliently bounce back with post-COVID 19 initiatives; Hana Tour will launch high-tech travel booking platform "Hana Hub" to capture the recovered travel demands, and local OTA "My Real Trip" will reinforce domestic tour products with technical development while almost of their sales came from overseas products before COVID-19.

- **Corporate Updates:** Korean major conglomerates such as Hyundai or 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 coronavirus outbreak. Instead, they are applying the flexible working hours or implementing the COVID-19 taskforce policies.
- **JP Morgan Cuts 2020 Growth Outlook:** Global investment bank JP Morgan has cut its 2020 growth outlook for South Korea to 0.8 percent from the previous 1.9 percent, citing global economic fallout from COVID-19. The bank forecast that South Korea's exports of goods and services would shrink at a steeper pace this year than during the 2008 global financial crisis.
- **General Election on April 15:** South Korea is preparing for the April 15 parliamentary elections in the midst of the ongoing coronavirus pandemic, prioritizing the safety of voters and considering reducing the voting period for overseas Koreans. Mindful of the potential for low voter turnout, the government is exploring ways to encourage voters to cast their ballots without risking COVID-19 infection.
- **South Korea's Business Sentiment:** According to data of Bank of Korea (BOK) on March 25, the business sentiment of South Korean manufacturers sharply deteriorated for April, amid growing concerns that the fast-spreading COVID-19 outbreak may undermine the South Korea's already weak exports and economic recovery. The Business Survey Index (BSI) for April expectation from the nation's top 600 companies recorded 59.3, the lowest since January 2009, when the index was 52, according to the Korea Economic Research Institute (KERI).
- **Exchange Rate/Fuel Surcharges:** The average USD/WON exchange rate in March was 1217.41, a slight increase from the previous rate of 1194.43 won in February. South Korean airline carriers will apply no fuel surcharge on international routes in April to reflect declining oil prices. A US\$30.74 surcharge was applied in March for a round trip between Korea and the U.S.

Sales Production Analysis

Hawai'i Tourism Korea's (HTK) MCI team was unable to fulfill its KPI target during March 2020 under the COVID-19 pandemic situation. The targeted number was 2,000 definite/assist-definite room nights, but HTK did not produce any definite/assist-definite room nights during March. Most of the corporates in Korea has postponed or canceled their trips to Hawai'i. HTK's MCI team will be in line with HTA and Meet Hawai'i Team's directive and continue to deliver the key messages to Korean MICE corporate clientele.

Highlight of Key Definites

- None to report for March.

Highlight of Key Tentatives

- None to report for March.

Advertising and PR Activity

- None to report for March.

**Table 2f: Hawai'i Tourism Korea Single Property Sales Production
April 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	2,543	-100%	247	6,280	-96%	TBD	TBD
New to Hawai'i	0	782	-100%	130	3,397	-96%	TBD	TBD
Tentative & Assist-Tentative	0	2,531	-100%	1,372	5,890	-77%	TBD	TBD
MCI								
Definite & Assist-Definite	0	2,468	-100%	247	6,205	-96%	TBD	TBD
New to Hawai'i	0	707	-100%	130	3,322	-96%	TBD	TBD
Tentative & Assist-Tentative	0	2,456	-100%	1,372	5,815	-76%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	75	-100%	0	75	-100%	TBD	TBD
New to Hawai'i	0	75	-100%	0	75	-100%	TBD	TBD
Tentative & Assist-Tentative	0	75	-100%	0	75	-100%	TBD	TBD

COMMENTS

Market Conditions

- **Coronavirus Outbreak Key Update in Korea:** South Korea will end its week-long social distancing campaign and implement an everyday life quarantine scheme later this week as the COVID-19 outbreak has slowed.
- **Airlift Updates:** Korean Air extended the suspension of its daily flight services to Honolulu through June 30, 2020. Asiana Airlines also suspended its flight service to Honolulu until May 31, 2020. Hawaiian Airlines halted its flight service routes through June 1, 2020, which most likely be extended through end of June.
- **Agency Updates:** Hana Tour and Mode Tour reported zero booking sales for April, following an 80 percent drop in February and a 99 percent decrease in March.
- **Exchange Rate:** The average USD/WON exchange rate in April was 1223.06, a slight increase from the previous rate of 1217.41 won in March.

Sales Production Analysis

Hawai'i Tourism Korea (HTK) has no production to report for the month of April amid the COVID-19 pandemic. Under the state government's request to postpone all trips to the Hawaiian Islands, most of the Korean corporates has postponed or canceled their MCI trips to Hawai'i. HTK's MCI team will be in line with HTA and Meet Hawai'i Team's directive and make its continuous effort to deliver the key messages to Korean MICE corporate clientele.

Advertising and PR Activity

- None to report for April.

**Table 2g: Hawai'i Tourism Oceania Single Property Sales Production
March 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	280	1,022	-73%	438	1,738	-75%	TBD	TBD
New to Hawai'i	280	982	-71%	438	1,617	-73%	TBD	TBD
Tentative & Assist-Tentative	4,820	4,663	3%	8,807	7,483	18%	TBD	TBD
MCI								
Definite & Assist-Definite	200	931	-79%	358	1,566	-77%	TBD	TBD
New to Hawai'i	200	891	-78%	358	1,526	-77%	TBD	TBD
Tentative & Assist-Tentative	3,360	4,483	-25%	7,287	7,143	2%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	80	91	-12%	80	172	-53%	TBD	TBD
New to Hawai'i	80	91	-12%	80	91	-12%	TBD	TBD
Tentative & Assist-Tentative	1,460	180	711%	1,520	340	347%	TBD	TBD

COMMENTS

Market Conditions

The Impacts of Coronavirus in the Meetings Industry – The outbreak of COVID-19 has spread, impacting millions of people around the world, and the Oceania region is no exception. Significant and drastic changes were made, and several strict rules were implemented by the governments to combat the virus spread during the month of March which directly impacted all industry and all walks of life.

- Prime Minister Scott Morrison placed a nationwide ban on non-essential indoor gatherings of 100 or more people, effective from March 18, 2020. On that same day, he confirmed the Federal Government's new mandate against all international travel which was the first time that has ever happened in Australia's history. All the 'non-essential' travel was banned a week later and after midnight of March 28, all passengers arriving from overseas are required to be in self-isolation in a hotel for 14 days which has been one of the most drastic measurements against the spread of COVID-19 from the Australian Government. Moreover, for the public, gatherings of more than two people, apart from immediate family, are banned as are all non-essential activities. By the end of March, Australia recorded 19 deaths and number of cases rose to 4,500 across the country.
- Following the border closures and international travel bans, Hawaiian Airlines announced the temporary suspension of Sydney-Honolulu service from March 22 to April 30 and its Brisbane-Honolulu service from March 23 to May 31.
- The NZ government announced that the country would go into lockdown from March 26, with only essential services, such as hospitals, supermarkets and pharmacies, remaining open. Schools and workplaces were closed. Any person arriving on an international flight were required to self-isolate for 2 weeks from time of arrival help to minimize the spread of the virus.

- Both Air New Zealand and Hawaiian Airlines have suspended services between NZ and Hawai'i. Hawaiian's last flight out of Auckland was on March 21 to May 31. Air NZ's last flight was on March 28 with hopes to resume services again in early June.

Impacts to the Economy & Industry

- In Australia, travel and event industry were the very first to feel the impact of COVID-19. Major airlines such as Qantas, Jetstar and Virgin have significantly reduced airlifts for both internal and domestic in order to respond to the border closures and travel bans. Qantas and Jetstar cut international capacity by 90 percent through the end of May while Virgin Australia grounded its international fleet from March 30 to June 14.
- Flight Centre has announced major changes in response to the COVID-19 crisis, which has already seen the company's total transaction value slump to just 20-30 percent of normal levels globally in March. About 6,000 support and sales roles will either be stood down temporarily or in some instances made redundant. Flight Centre's major changes impacted key MCI clients under Flight Centre's umbrella such as Cievents and Corporate Traveller.
- In New Zealand, many of the airlines and wholesalers have had to make staff redundant and/or reduce staff hours as tourism comes to almost a complete halt.

Sales Production Analysis

The impact of COVID-19 to the travel & event industry is devastating following the border closures, travel bans, flight suspensions and the strict isolation rules. These drastic changes contribute to group cancellations and postponements for the MCI business from Australia & New Zealand. HTO records two conference cancellations during the month of March.

The downfall of exchange rate also got worsen in March due to the impact of COVID-19. On March 19, the AUD/USD tumbled to 0.5509, its lowest level in nearly 18 years due to the panic following the government's international travel bans. In New Zealand the dollar has fallen to a new low and was sitting at US0.60 on March 31.

Highlight of Key Definites

- Sports group, September 2020 (80 room nights)
- Meeting – manufacturing association, September 2020 (200 room nights)

Highlight of Key Tentatives

- Educational group, November 2020 (60 room nights)
- Convention – food/restaurants corporation, September 2021 (1,860 room nights)
- Convention – insurance association, September 2020 (1,500 room nights)
- Sports group, April 2020 (1,400 room nights)

Advertising and PR Activity

- None to report for March.

**Table 2g: Hawai'i Tourism Oceania Single Property Sales Production
April 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	565	-100%	438	2,303	-81%	TBD	TBD
New to Hawai'i	0	185	-100%	438	1,802	-76%	TBD	TBD
Tentative & Assist-Tentative	0	745	-100%	8,807	8,228	7%	TBD	TBD
MCI								
Definite & Assist-Definite	0	185	-100%	358	1,751	-80%	TBD	TBD
New to Hawai'i	0	185	-100%	358	1,711	-79%	TBD	TBD
Tentative & Assist-Tentative	0	645	-100%	7,287	7,788	-6%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	380	-100%	80	552	-86%	TBD	TBD
New to Hawai'i	0	0	N/A	80	91	-12%	TBD	TBD
Tentative & Assist-Tentative	0	100	-100%	1,520	440	245%	TBD	TBD

COMMENTS

Market Conditions

The Impacts of COVID-19

- New Zealand was in Alert Level 4 lockdown for most of April but moved to Alert Level 3 on April 27. Some businesses have reopened to restart the economy and are subject to social distancing/contactless rules. However, tourism related businesses are still restricted from opening.
- Despite the severe impacts on the economy, Australia started to see positive signs following the strict lockdown such as the decreasing number of cases across the country. One of the major developments in Australia is the launch of the COVIDSafe tracking app as part of the government's strategy to identify, trace and isolate beyond physical distance restrictions.

Aviation Updates

- There was no airlift from the Oceania region to Hawai'i during April. Although an update on this is expected in the next couple of weeks, services are not scheduled to resume until June/July 2020. It is highly likely that this will be pushed out further until the respective governments open borders again.

Impacts to the Economy & Industry

- While the NZ dollar hit a low during March, April has seen the exchange rate gain some ground and it is currently sitting at around USD 0.61.
- Australian dollar has bounced back to USD 0.64 by the end of April following the passing of the JobKeeper package by the Senate earlier in the month.

Sales Production Analysis

Hawai'i Tourism Oceania (HTO) has no production to report for the month of April amid the COVID-19 pandemic. However, the team has remained in constant contact with key clients to ensure Hawai'i remains front of mind once planning resumes. April is traditionally a quieter month with school holidays, Easter and ANZAC Day.

Highlight of Key Cancellations

- Incentive – pharmaceutical corporation, May 2020 (201 room nights)

Advertising and PR Activity

- None to report for April.

**Table 2h: Hawai'i Tourism Southeast Asia Single Property Sales Production
March 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD
MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD

COMMENTS

Market Conditions

The MCI market in Southeast Asia, especially from the three focus countries (Malaysia, Singapore, and Thailand), are extremely low due to the coronavirus pandemic.

- Malaysia has implemented a nationwide Movement Control Order (MCO) that acts like a semi-lockdown, preventing all citizens from leaving the country to curb the spread of the virus. This MCO started on March 11 and will tentatively end on April 14.
- Thailand, on the other hand, has announced a state of emergency that went into effect nationwide on March 25 and remain in force until April 30. This gave the government powers to order curfews and travel bans in the country.
- In Singapore, all citizens have been advised to defer all travel abroad amid a heightened risk of importing COVID-19 cases into Singapore. No lockdown has been imposed in Singapore, but many companies are encouraged to practice work-from-home policy.

Flight connections to Hawai'i by Philippine Airlines, Korean Air, All Nippon Airways, Japan Airlines, and China Airlines from Kuala Lumpur, Bangkok, and Singapore have all been suspended until end of April or until further notice. Due to the uncertainty of the pandemic, incentive groups have deferred their travel plan but local travel operators are positive that things should improve by Q3-Q4 of 2020.

Sales Production Analysis

- None to report for March.

Advertising and PR Activity

- None to report for March.

**Table 2i: Hawai'i Tourism Taiwan Single Property Sales Production
March 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD
MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD

COMMENTS

Market Conditions

- A bill that grants NT \$60 billion (US \$2 billion) emergency spending has been signed off by Taiwan's government to help revive and sustain industries affected by COVID-19, and to support medical staffs and hospitals.
- Taiwan and the U.S. have established a partnership to combat the virus together by sharing best practices and cooperation on a range of activities that includes research and development for tests, contact tracing techniques and offering medical supplies and equipment.
- Although Taiwan has the impact of COVID-19 well under control, the drop in overall travel demand has impacted the industry. Due to COVID-19 developing into a worldwide pandemic, there has been a dampening of travel sentiments as travel restrictions are increasingly imposed by governments globally.
- The outbreaks in Europe, Middle East, and the U.S. have led to China Airlines and EVA AIR both announcing suspensions of flights on the North American routes. However, the overall flight situation in May onwards remains 95 percent of that pre-COVID-19.
- China Airlines is suspending 21 flights or 6,426 seats for TPE-HNL route from March 31 to May 16. Prior to the crisis, China Airlines operates 8 flights or 2,448 seats regularly from Taipei to Honolulu a month. During peak season of April to October, the capacity increases by 50 percent to 12 flights or 3,672 seats a month.

Sales Production Analysis

- A series of trade trainings are planned with Taipei Association of Travel Agents to educate agents on North America. Hawai'i Tourism Taiwan (HTT) as well as five other DMOs (Brand USA, Visit California, Guam Visitors Bureau, Marianas Visitors Bureau and San Francisco Travel) will take the stage to share destination information. The objective of these trainings will be to educate and equip travel agents with destination knowledge to introduce Hawai'i to potential clients post-COVID-19. HTT will share Hotels & Resorts Maps of The Hawaiian Islands as well as Meet Hawai'i website at the seminar.
- Post-COVID-19, HTT will reach out to MCI intermediaries to promote Hawai'i as the go-to MICE destination and develop potential leads. In addition, HTT will visit corporations that cancelled this year's incentive due to COVID-19 and reinforce their desire to visit Hawai'i for their next company retreat.

Highlight of Key Definites

- None to report for March.

Highlight of Key Tentatives

- None to report for March.

Highlight of Key Prospects

- None to report for March.

Advertising and PR Activity

- None to report for March.

**Table 2i: Hawai'i Tourism Taiwan Single Property Sales Production
April 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD
MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD

COMMENTS

Market Conditions

The Central Epidemic Command Center (CECC) announced the extension of restrictions on direct flights and the ban on air transits through Taiwan until further notice amid the continuing spread of COVID-19 globally. The measures were originally scheduled to be lifted on April 29 and 30 respectively.

- Affected by COVID-19 pandemic, China Airlines suspended its Taipei to Honolulu direct flights between March 25 to May 31. Total cancellation is 29 flights or 8,874 seats.
- The suspension of all inbound and outbound group tours imposed on Taiwanese travel agencies will extend until the end of May to contain the spread of coronavirus.

Sales Production Analysis

Hawai'i Tourism Taiwan (HTT) has no production to report for the month of April amid the COVID-19 pandemic. HTT will continue efforts in tracking potential leads with MCI intermediaries to be ready when marketing activities kick off again.

Advertising and PR Activity

- None to report for April.

**Table 3: Island Distribution of HVCB Single Property Sales – Year-to-Date
March 2020**

Island	Tentative Room Nights YTD Actual*	Tentative Room Nights YTD Annual Goal	Definite Room Nights Month Actual	Definite Room Nights YTD Actual	Percent of Goal	Lead-to-Booking Conversion (Room Nights) Goal	Lead-to-Booking Conversion (Room Nights) Actual
O‘ahu	92,739	TBD	302	2,071	TBD	TBD	2%
Kaua‘i	28,977	TBD	0	690	TBD	TBD	2%
Maui County	93,328	TBD	0	3,115	TBD	TBD	3%
Hawai‘i	73,811	TBD	5,609	5,767	TBD	TBD	8%
Total	288,855	-	5,911	11,643	-		

**Table 3: Island Distribution of HVCB Single Property Sales – Year-to-Date
April 2020**

Island	Tentative Room Nights YTD Actual*	Tentative Room Nights YTD Annual Goal	Definite Room Nights Month Actual	Definite Room Nights YTD Actual	Percent of Goal	Lead-to-Booking Conversion (Room Nights) Goal	Lead-to-Booking Conversion (Room Nights) Actual
O‘ahu	114,122	TBD	150	2,221	TBD	TBD	2%
Kaua‘i	33,776	TBD	0	690	TBD	TBD	2%
Maui County	114,434	TBD	4,692	7,807	TBD	TBD	7%
Hawai‘i	91,087	TBD	4,797	10,564	TBD	TBD	12%
Total	353,419	-	9,639	21,282	-		

*Tentative room nights do not match those in Table 2b because many leads are distributed to more than one island.

‘ELELE PROGRAM – March 2020

March meetings and updates from Deborah Zimmerman, ‘Elele Program Director from New Millennium Meetings (NMM):

Support for Tentative Meetings

At the request of the Director of Sales – Midwest for citywide sales, ‘Elele Program Director found ‘Elele for the July site inspection of an engineering association. These ‘Elele are leaders in the local chapter and were quite pleased to be invited to participate in the solicitation process.

Promising Prospects

- ‘Elele Program Director connected with the executive director of a national engineering organization who will be residing in Honolulu for the next 3 years.
- ‘Elele Program Director is prospecting an umbrella organization for four independent scientific associations. Each association has the potential to bring meetings to Hawai‘i including an annual conference for 3,000 attendees.

- Acting on a tip from the Hawai‘i Cancer Center, a presentation was created for an ‘Elele to bid for an Asia Pacific medical conference taking place in July 2023 for 1,000 attendees.
- ‘Elele Program Director approached ‘Elele about crafting written invitations to convene in Hawai‘i. These letters will be sent once the COVID-19 situation calms down.

Strengthening the ‘Elele Program

‘Elele Program Director had a Zoom meeting with the Branch Chief for Support Services at the Department of Business and Economic Development (DBEDT) and the Director from the Office of Innovation and Commercialization, University of Hawai‘i to understand how meetings and conventions can be used for broad economic development. As a result of the meeting, a listing of all research related meetings coming to the Hawai‘i Convention Center in 2020 and 2021 was curated so that the University can get engaged in these events. Moreover, a “hit list” was requested to help find ‘Elele within the university system for future tentatives and prospects.

‘ELELE PROGRAM – April 2020

April meetings and updates from Deborah Zimmerman, ‘Elele Program Director from New Millennium Meetings (NMM):

Support for Tentative Meetings

- Secured a support letter for a scientific conference originally planned for Japan in June 2020, which was looking to shift meeting dates because of the COVID-19 pandemic. In the end, the destination did not secure the meeting due to date preferences. However, the association did say that Hawai‘i was their preferred venue when the meeting rotates back to the States in 2026 or 2028.

Promising Prospects

- Secured a support letter for an annual scientific convention in Hawai‘i for 8,000 attendees. ‘Elele Program Director followed up with an invitation from the Deputy Director of the University of Hawai‘i Cancer Center, who is the local ambassador in the Islands for the scientific association.

LOST BUSINESS – March 2020

**Table 4a: HVCB Citywide Lost Business
March 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations	Reason for Lost Business
MCI: Convention - Domestic (8955)	Scientific	5,325	2,000	08/23/2020 - 08/28/2020	Initially, Hawai'i only	Program lost to Cape Town, South Africa.
Non-MCI: Special Event (18457)	Culture, Arts	3,600	2,000	06/07/2020 - 06/24/2020	Initially, Hawai'i only	Program postponed due to COVID-19.

**Table 4b: HVCB Single Property High Profile Lost Business
March 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations	Reason for Lost Business
MCI: Convention - Domestic (16856)	Educational	502	299	10/01/2024 - 10/05/2024	Reno, Tahoe, San Diego, San Francisco, Virgin Islands	Program was cancelled due to change in requirements.
MCI: Incentive (18316)	Medical, Pharm	665	250	05/19/2020 - 05/27/2020	Initially, Hawai'i only	Program postponed due to COVID-19.
MCI: Meeting (18814)	High Tech	750	150	05/18/2020 - 05/22/2020	Banff, Lake Louise, Mountain Resorts	Program postponed due to COVID-19.

**Table 4c: International Single Property Lost Business
March 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations	Reason for Lost Business
HT Oceania: MCI: Incentive (18364)	Technology	195	74	06/04/2021 - 06/08/2021	Tokyo	Program lost to Tokyo.
HT Oceania: MCI: Incentive (18494)	Confidential	150	100	05/27/2020 - 05/29/2020	Initially, Hawai'i only	Program lost due to COVID-19.
HT Korea: MCI: Incentive (19046)	Sports	1,125	250	04/10/2020 - 04/18/2020	Initially, Hawai'i only	Program lost due to COVID-19.

LOST BUSINESS – April 2020

**Table 4a: HVCB Citywide Lost Business
April 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations	Reason for Lost Business
MCI: Convention - Domestic (9644)	Insurance	5,600	3,500	06/22/2022 - 06/30/2022	Initially, Hawai'i only	Program was lost due to change in requirements.

**Table 4b: HVCB Single Property High Profile Lost Business
April 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations	Reason for Lost Business
MCI: Convention - Domestic (18019)	Unknown	2,400	1,600	10/02/2020 - 10/05/2020	Initially, Hawai'i only	Program was lost due to change in requirements.
MCI: Incentive (18269)	Unknown	900	300	09/04/2021 - 09/10/2021	Initially, Hawai'i only	Program postponed due to COVID-19.
MCI: Incentive (19008)	High Tech	1,205	450	08/06/2020 - 08/11/2020	Initially, Hawai'i only	Program postponed due to COVID-19.
MCI: Incentive (19033)	Multi Level Marketing	818	380	11/02/2020 - 11/09/2020	Initially, Hawai'i only	Program lost to Mexico.
MCI: Incentive (19047)	Unknown	665	250	08/04/2020 - 08/12/2020	Initially, Hawai'i only	Program postponed due to COVID-19.
Non-MCI: Sleeping Rooms Only (19056)	Medical, Pharm	1,905	100	04/07/2020 - 05/08/2020	Initially, Hawai'i only	Client booked direct with hotel.
MCI: Convention - Domestic (19062)	Technology	4,755	2,300	11/23/2020 - 11/30/2020	Initially, Hawai'i only	Program lost to San Diego, CA.

**Table 4c: International Single Property Lost Business
April 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations	Reason for Lost Business
HT Canada: MCI: Incentive (14834)	Unknown	344	220	03/25/2021 - 03/28/2021	Initially, Hawai'i only	Program lost to all-inclusive Caribbean cruise.
HT Oceania: MCI: Meeting (18510)	Manufacturing	200	100	09/30/2020 - 10/03/2020	Initially, Hawai'i only	Program postponed due to COVID-19.

New-to-Hawai'i Definite Bookings – March 2020

**Table 5a: HVCB Citywide New to Hawai'i Definite Bookings
March and 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations
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None to report for March.

TOTAL NEW TO HAWAI'I CITYWIDE BOOKINGS FOR THE MONTH	0
TOTAL ROOM NIGHTS FOR NEW TO HAWAI'I CITYWIDE BOOKINGS	0

**Table 5b: HVCB Single Property High Profile New to Hawai'i Definite Bookings
March 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations
MCI: Convention - Domestic (18349)	Medical, Healthcare	3,996	800	01/22/2025 - 02/02/2025	Initially, Hawai'i only
MCI: Incentive (18950)	Consumer Products	1,613	300	01/06/2024 - 01/17/2024	Initially, Hawai'i only

**Table 5c: International Single Property New to Hawai'i Definite Bookings
March 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations
HT Oceania: MCI: Meeting (18510)	Manufacturing	200	100	09/26/2020 - 09/29/2020	Initially, Hawai'i only
HT Oceania: Non-MCI: Sports (18518)	Sports	80	20	09/02/2020 - 09/09/2020	Initially, Hawai'i only
HT Japan: MCI: Incentive (19018)	Real Estate	894	410	04/05/2020 - 04/09/2020	Singapore
HT Japan: MCI: Meeting (19019)	Manufacturing, Distrib.	465	161	05/31/2020 - 06/04/2020	Initially, Hawai'i only

TOTAL NEW TO HAWAI'I SINGLE PROPERTY BOOKINGS FOR THE MONTH	8
TOTAL ROOM NIGHTS FOR NEW TO HAWAI'I SINGLE PROPERTY BOOKINGS	7,454

New to Hawai'i bookings are accounts that have never met in Hawai'i before or, in the case of citywides, have not met in Hawai'i in the last 10 years or for single property bookings, not in the past five years.

New-to-Hawai'i Definite Bookings – April 2020

**Table 5a: HVCB Citywide New to Hawai'i Definite Bookings
April 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations
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None to report for April.

TOTAL NEW TO HAWAI'I CITYWIDE BOOKINGS FOR THE MONTH	0
TOTAL ROOM NIGHTS FOR NEW TO HAWAI'I CITYWIDE BOOKINGS	0

**Table 5b: HVCB Single Property High Profile New to Hawai'i Definite Bookings
April 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations
MCI: Convention - Domestic (18806)	Educational	4,058	750	11/08/2023 - 11/19/2023	Initially, Hawai'i only
MCI: Incentive (19039)	Insurance	3,621	650	10/20/2020 - 11/04/2020	Initially, Hawai'i only

**Table 5c: International Single Property New to Hawai'i Definite Bookings
April 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations
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None to report for April.

TOTAL NEW TO HAWAI'I SINGLE PROPERTY BOOKINGS FOR THE MONTH	7
TOTAL ROOM NIGHTS FOR NEW TO HAWAI'I SINGLE PROPERTY BOOKINGS	8,817

New to Hawai'i bookings are accounts that have never met in Hawai'i before or, in the case of citywides, have not met in Hawai'i in the last 10 years or for single property bookings, not in the past five years.

MAJOR SALES AND MARKETING ACTIVITIES – March 2020

Meet Hawai'i participated in the following MCI events:

- 3 educational events
 - HVCB Citywide
 - International Congress and Convention Association (ICCA)/ American Society of Association Executives (ASAE) Webinar Presentation, March 18
 - HVCB Single Property
 - Professional Convention Management Association (PCMA) Quarterly Meeting, Chicago, IL, March 10
 - International GMTs
 - HT Oceania – A Force for Good Event, Auckland, New Zealand, March 9

- 3 trade shows
 - HVCB Single Property
 - Prestige, San Diego, CA, March 3
 - Prestige, Dana Point, CA, March 4
 - 2020 Annual Meetings International Convention (MIC) of Colorado Education Conference and Trade Show, Denver, CO, March 10-11

- 1 sales blitz
 - HVCB Single Property
 - Colorado Sales Blitz, Denver, CO, March 7-14

- 7 major site visits and familiarization (FAM) tours with clients and potential clients
 - HVCB Citywide
 - 1 virtual site visit, O'ahu
 - HVCB Single Property
 - 2 site visits, O'ahu
 - 2 virtual site visit, Kaua'i
 - 1 virtual site visit, O'ahu
 - International GMTs
 - HTO – 1 virtual site visit, O'ahu and Island of Hawai'i

MAJOR SALES AND MARKETING ACTIVITIES – April 2020

Meet Hawai'i participated in various educational webinars discussing the COVID-19 impact to the meetings industry and recovery strategies in April.

FUTURE SALES AND MARKETING ACTIVITIES

Meet Hawai'i will participate in the following MCI events in the upcoming months:

None to report for the next three months.

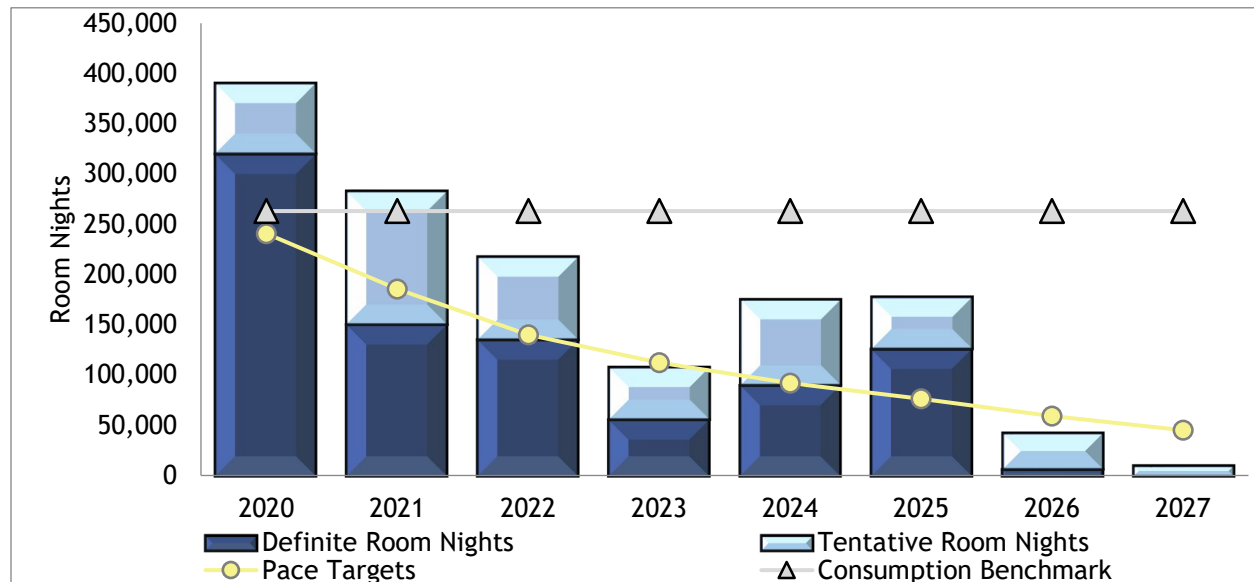
CONSUMPTION – March 2020

The TAP Reports on the next page show the number of events and room nights on the books for each year 2020-2027 against a rolling 36-month consumption benchmark.

Table 6: The TAP Report: Hawai'i 8-year Pace (citywide and single property)

Period ending: March 31, 2020

Report date: April 6, 2020



Hawai'i R/N	2020	2021	2022	2023	2024	2025	2026	2027	Total
Definite Room Nights	319,527	150,448	135,480	56,233	90,169	126,370	7,014	0	885,241
Pace Targets	240,666	185,690	140,111	112,367	92,012	76,318	59,156	45,113	951,433
Variance	78,861	(35,242)	(4,631)	(56,134)	(1,843)	50,052	(52,142)	(45,113)	(66,192)
Consumption Benchmark	263,124	263,124	263,124	263,124	263,124	263,124	263,124	263,124	2,104,992
Pace Percentage	133%	81%	97%	50%	98%	166%	12%	0%	93%
Total Demand Room Nights	867,945	571,981	309,930	181,262	144,913	169,070	71,299	10,525	2,326,925
Lost Room Nights	548,418	421,533	174,450	125,029	54,744	42,700	64,285	10,525	1,441,684
Conversion Percentage	37%	26%	44%	31%	62%	75%	10%	0%	38%
Tentative Room Nights	70,072	132,368	82,405	52,085	85,345	51,867	36,231	10,650	521,023

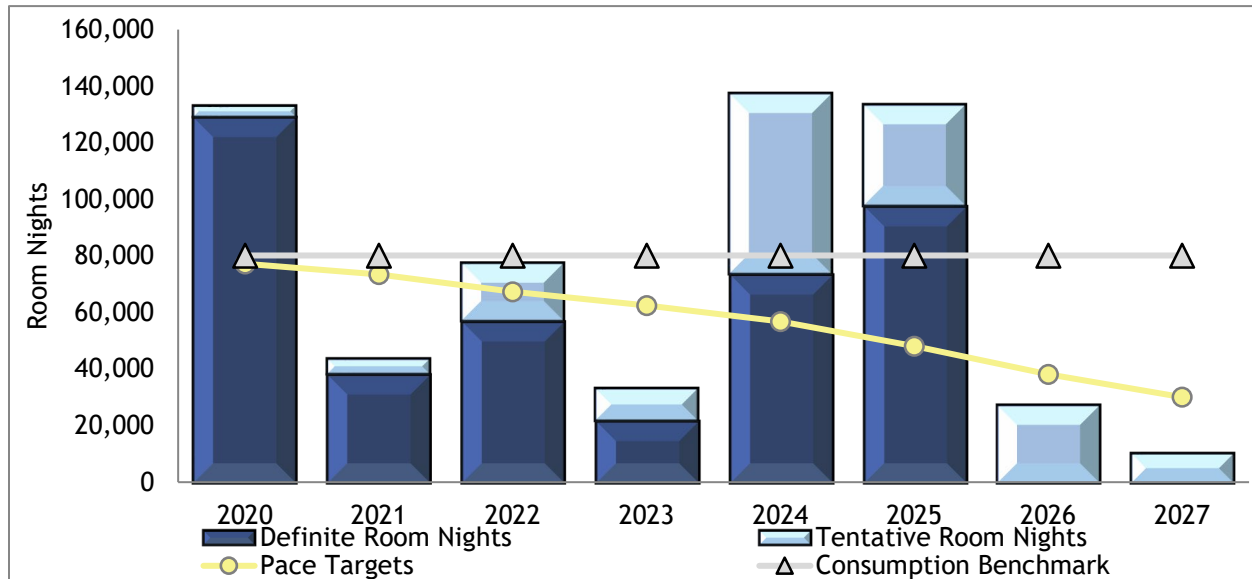
Hawai'i Events	2020	2021	2022	2023	2024	2025	2026	2027	Total
Definite Events	300	117	51	21	18	17	4	0	528
Pace Targets	254	102	47	24	14	8	5	1	455
Variance	46	15	4	(3)	4	9	(1)	(1)	73
Consumption Benchmark	359	359	359	359	359	359	359	359	2,872
Pace Percentage	118%	115%	109%	88%	129%	213%	80%	0%	116%
Total Demand Events	774	261	91	45	26	20	7	1	1,225
Lost Events	474	144	40	24	8	3	3	1	697
Conversion Percentage	39%	45%	56%	47%	69%	85%	57%	0%	43%
Tentative Events	147	226	72	27	15	10	7	1	505

The number of events reported in TAP is slightly higher than the actual number of events due to a number of overflow programs and the splitting of some bookings into two in order to track shared credit.

Table 7: The TAP Report: Convention Center 8-year Pace (citywide only)

Period ending: March 31, 2020

Report date: April 6, 2020



Hawai'i R/N	2020	2021	2022	2023	2024	2025	2026	2027	Total
Definite Room Nights	128,850	38,402	57,045	21,939	73,540	97,529	0	0	417,305
Pace Targets	77,218	73,458	67,347	62,485	56,778	48,078	38,109	30,059	453,532
Variance	51,632	(35,056)	(10,302)	(40,546)	16,762	49,451	(38,109)	(30,059)	(36,227)
Consumption Benchmark	80,144	80,144	80,144	80,144	80,144	80,144	80,144	80,144	641,152
Pace Percentage	167%	52%	85%	35%	130%	203%	0%	0%	92%
Total Demand Room Nights	371,126	315,740	164,183	111,327	114,307	140,229	64,285	10,525	1,291,722
Lost Room Nights	242,276	277,338	107,138	89,388	40,767	42,700	64,285	10,525	874,417
Conversion Percentage	35%	12%	35%	20%	64%	70%	0%	0%	32%
Tentative Room Nights	4,095	5,465	20,626	11,570	63,871	35,884	27,576	10,650	179,737

Hawai'i Events	2020	2021	2022	2023	2024	2025	2026	2027	Total
Definite Events	15	9	8	3	7	6	0	0	48
Pace Targets	14	11	7	7	6	1	1	0	47
Variance	1	(2)	1	(4)	1	5	(1)	0	1
Consumption Benchmark	20	20	20	20	20	20	20	20	160
Pace Percentage	107%	82%	114%	43%	117%	600%	0%	0%	102%
Total Demand Events	43	35	18	12	11	9	3	1	132
Lost Events	28	26	10	9	4	3	3	1	84
Conversion Percentage	35%	26%	44%	25%	64%	67%	67%	67%	36%
Tentative Events	3	2	3	4	6	3	3	1	25

The number of events reported in TAP is slightly higher than the actual number of events due to a number of overflow programs and the splitting of some bookings into two in order to track shared credit.

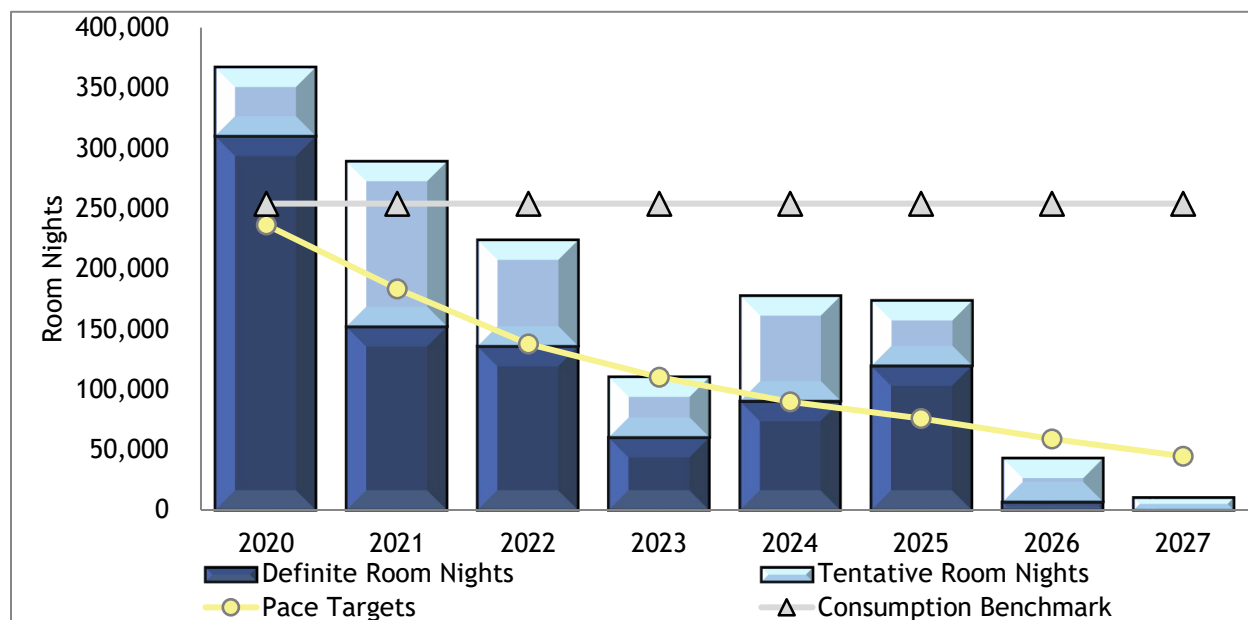
CONSUMPTION – April 2020

The TAP Reports on the next page show the number of events and room nights on the books for each year 2020-2027 against a rolling 36-month consumption benchmark.

Table 6: The TAP Report: Hawai'i 8-year Pace (citywide and single property)

Period ending: April 30, 2020

Report date: May 5, 2020



Hawai'i R/N	2020	2021	2022	2023	2024	2025	2026	2027	Total
Definite Room Nights	309,360	151,872	135,480	60,291	90,169	119,528	7,014	0	873,714
Pace Targets	236,334	183,378	137,729	110,041	89,697	75,803	58,780	44,634	936,396
Variance	73,026	(31,506)	(2,249)	(49,750)	472	43,725	(51,766)	(44,634)	(62,682)
Consumption Benchmark	254,067	254,067	254,067	254,067	254,067	254,067	254,067	254,067	2,032,536
Pace Percentage	131%	83%	98%	55%	101%	158%	12%	0%	93%
Total Demand Room Nights	888,384	574,739	315,530	185,320	144,913	169,070	71,299	10,525	2,359,780
Lost Room Nights	579,024	422,867	180,050	125,029	54,744	49,542	64,285	10,525	1,486,066
Conversion Percentage	35%	26%	43%	33%	62%	71%	10%	0%	37%
Tentative Room Nights	57,456	136,919	88,198	50,137	87,455	53,977	36,231	10,650	521,023

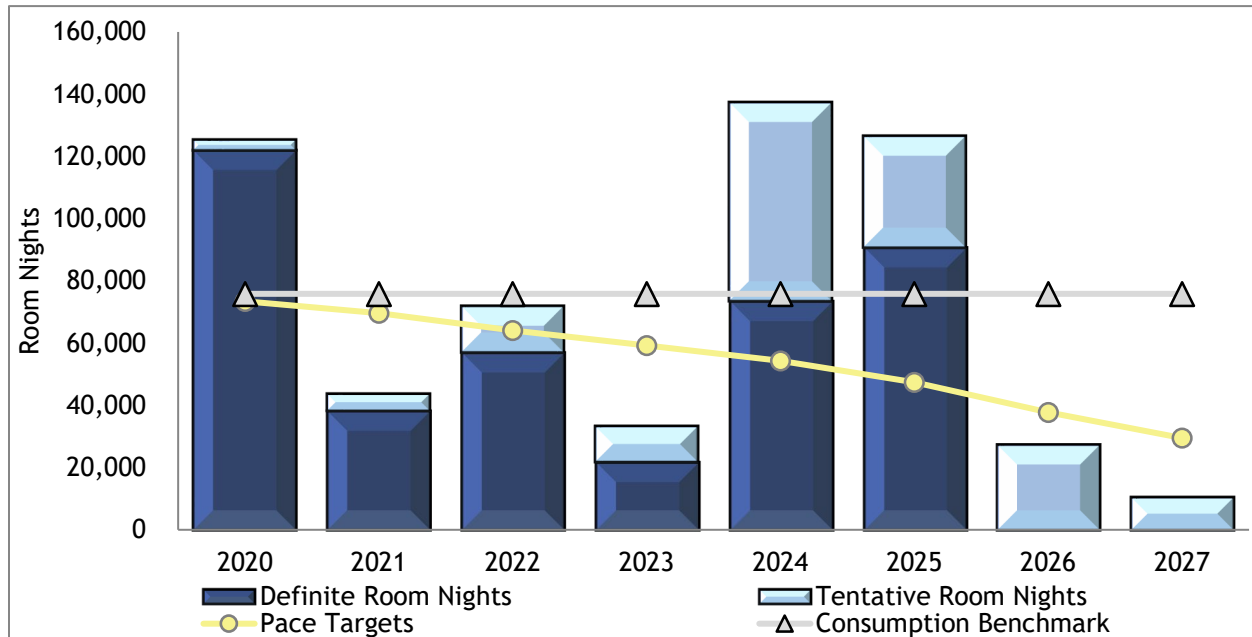
Hawai'i Events	2020	2021	2022	2023	2024	2025	2026	2027	Total
Definite Events	288	121	51	22	18	16	4	0	520
Pace Targets	271	105	50	26	14	9	5	2	482
Variance	17	16	1	(4)	4	7	(1)	(2)	38
Consumption Benchmark	354	354	354	354	354	354	354	354	2,832
Pace Percentage	106%	115%	102%	85%	129%	178%	80%	0%	108%
Total Demand Events	800	269	92	46	26	20	7	1	1,261
Lost Events	512	148	41	24	8	4	3	1	741
Conversion Percentage	36%	45%	55%	48%	69%	80%	57%	0%	41%
Tentative Events	122	242	80	28	16	11	7	1	507

The number of events reported in TAP is slightly higher than the actual number of events due to a number of overflow programs and the splitting of some bookings into two in order to track shared credit.

Table 7: The TAP Report: Convention Center 8-year Pace (citywide only)

Period ending: April 30, 2020

Report date: May 5, 2020



Hawai'i R/N	2020	2021	2022	2023	2024	2025	2026	2027	Total
Definite Room Nights	121,890	38,402	57,045	21,939	73,540	90,687	0	0	403,503
Pace Targets	73,436	69,635	64,118	59,286	54,286	47,412	37,786	29,483	435,442
Variance	48,454	(31,233)	(7,073)	(37,347)	19,254	43,275	(37,786)	(29,483)	(31,939)
Consumption Benchmark	75,839	75,839	75,839	75,839	75,839	75,839	75,839	75,839	606,712
Pace Percentage	166%	55%	89%	37%	135%	191%	0%	0%	93%
Total Demand Room Nights	371,461	315,740	169,783	111,327	114,307	140,229	64,285	10,525	1,297,657
Lost Room Nights	249,571	277,338	112,738	89,388	40,767	49,542	64,285	10,525	894,154
Conversion Percentage	33%	12%	34%	20%	64%	65%	0%	0%	31%
Tentative Room Nights	3,500	5,465	15,026	11,570	63,871	35,884	27,576	10,650	173,542

Hawai'i Events	2020	2021	2022	2023	2024	2025	2026	2027	Total
Definite Events	12	9	8	3	7	5	0	0	44
Pace Targets	16	13	8	7	6	3	1	1	55
Variance	(4)	(4)	0	(4)	1	2	(1)	(1)	(11)
Consumption Benchmark	20	20	20	20	20	20	20	20	160
Pace Percentage	75%	69%	100%	43%	117%	167%	0%	0%	80%
Total Demand Events	43	35	19	12	11	9	3	1	133
Lost Events	31	26	11	9	4	4	3	1	89
Conversion Percentage	28%	26%	42%	25%	64%	56%	56%	56%	33%
Tentative Events	2	2	2	4	6	3	3	1	23

The number of events reported in TAP is slightly higher than the actual number of events due to a number of overflow programs and the splitting of some bookings into two in order to track shared credit.

Glossary of TAP Report Terms

Consumption Benchmark – The average number of definite room nights produced by Meet Hawai'i for each month and year for the last three twelve month periods. Each month the “oldest” month is dropped from the calculation and the most recent month is added.

Conversion Index – A measurement for each month and year of the Meet Hawai'i's Conversion Percentage compared to the Peer Set's Conversion Percentage. A value greater than 100 indicates that Meet Hawai'i is converting more demand to definite room nights than the Peer Set.

Conversion Index Rank – The position of Meet Hawai'i's Conversion Index compared to the Peer Set.

Conversion Percentage – The percentage of Total Demand Room Nights that Meet Hawai'i converts to Definite Room Nights for each month a year at the time the report is published.

Definite Room Nights – Number of definite room nights, confirmed by Meet Hawai'i for each month and year at the time the report is published.

Definite Room Night Share % – A percentage indicating the Meet Hawai'i's portion of the Peer Set's Definite Room Night.

Lost Room Nights – The number of room nights, both definite and tentative, that have been lost for each month and year at the time the report is published.

Pace Index – A measurement for each month and year of the Meet Hawai'i's Pace Percentage compared to the Peer Set's Pace Percentage. A value greater than 100 indicates that the Meet Hawai'i's Pace Percentage is higher than that of the Peer Set. A number less than 100 indicates that the Meet Hawai'i's Pace Percentage is less than that of the Peer Set.

Pace Index Rank – The position of the Meet Hawai'i's Pace Index compared to the Peer Set.

Pace Percentage – The percentage of Definite Room Nights compared to the Pace Target. If Meet Hawai'i continues to book at current trends the same percentage can be applied to the Consumption Benchmark when each month and year passes.

Pace Target – Number of definite room nights that should be confirmed for each month and year at the time the report is published (updated every month). Pace targets are determined by analyzing a minimum of the last three years definite room nights and all definite room nights confirmed for the future. The analysis is completed by comparing the date a booking was confirmed to that of the arrival date for each confirmed booking and computing the number of months in advance of arrival that each booking was confirmed.

Room Night Demand Share % – A percentage indicating Meet Hawai'i's portion of the Peer Set's Demand.

Tentative Room Nights – The number of tentative room nights pending for each future month and year at the time the report is published.

Total Demand Room Nights – Number of total lead room nights issued by Meet Hawai'i for each month and year at the time the report is published.

Variance – The difference between the Definite Room Nights and the Pace Target.

CONVENTION CENTER PERFORMANCE – March 2020

Table 8: Convention Center Performance – February 29, 2020 Year-to-Date

PERFORMANCE MEASURE	YTD	TARGET	VARIANCE
Occupancy	32%	33%	-1%
Total Events	31	27	4
Total Attendance	48,203	62,675	(14,472)
Visitor Spending	\$89,888,787	\$89,888,787	\$0
Tax Revenue	\$10,516,988	\$10,516,988	\$0
Revenue per Attendee	\$55.77	\$37.36	\$18.41

COMMENTS

For the month ending February 29, 2020, the Hawai'i Convention Center (HCC) met or exceeded performance measures in all categories with the exception of Total Attendance, due to a comic con event only meeting 50 percent of its expected attendance.

February 2020 closed with gross revenues of \$1.2 million, just \$33,800 shy of budget and a net loss of \$72,200 which was \$102,100 better than planned. Year-to-date financials for HCC was off to a strong start with gross revenues and the bottom line reflecting 15 percent and 79 percent improvements, respectively, against budget.

However, with the new reality of COVID-19, the financial reforecast has been significantly impacted. At the time the March financial report was issued, the facility reforecast included ten COVID-19 event cancellations and a \$2.5 million net loss, which was \$221,000 more than budgeted. However, this reforecast was completed prior to the Centers for Disease Control (CDC) and the State of Hawai'i's recommendations against group gatherings of 10 or more people. In addition, Governor Ige ordered the 30-day closure of HCC on March 17, 2020. Since then, cancellations at HCC has grown to 44 as of March 27, 2020 and will continue to increase. HCC is mitigating its losses by offering to move event dates to the latter part of 2020 or 2021 if possible. HCC is also in the process of implementing contingency plans to weather through the ever-changing nature of COVID-19 and the impact it is having on the tourism industry.

CONVENTION CENTER PERFORMANCE – April 2020

Table 8: Convention Center Performance – March 31, 2020 Year-to-Date

PERFORMANCE MEASURE	YTD	TARGET	VARIANCE
Occupancy	25%	33%	-8%
Total Events	41	47	(6)
Total Attendance	51,422	136,275	(84,853)
Visitor Spending	\$100,297,338	\$182,078,813	(\$81,781,475)
Tax Revenue	\$11,734,789	\$21,303,222	(\$9,568,433)
Revenue per Attendee	\$58.31	\$28.99	\$29.32

COMMENTS

The positive financial results over January-February 2020 were offset against the negative results for the month ending March 31, 2020 due to the COVID-19 pandemic. Governor Ige ordered the facility's closure on March 17, 2020, and since then the Hawai'i Convention Center (HCC) has had 65 event cancellations. While the cancellation volume has slowed, it continues. Since April 17, 2020, the facility is being used by the Department of Labor and Industrial Relations to process unemployment calls and claims. The current reforecast reflects a \$4,155,300 net loss, which is \$1.8 million more than the original budget. All performance metrics are now significantly under target due to the COVID-19 pandemic.

DEFINITIONS

- **Single Property Group:** A group that can be booked into a single hotel for both guest rooms and meeting space.
- **Citywide Group:** A group that books Hawai'i Convention Center for meeting space; and which needs two or more hotels and has a minimum of 1,000 out-of-town attendees.
- **Group Bookings:** The total number of group room nights booked for the future. A group is defined as needing a minimum of 10 hotel rooms.
- **MCI and Non-MCI Bookings:** Both MCI and Non-MCI Bookings must primarily be off-shore bookings requiring attendees to stay in visitor accommodations. An MCI booking is an association or corporate meeting, convention or incentive program that requires meeting space. A Non-MCI booking requires off-site meeting space or no meeting space, or is public/consumer-facing like expos, sporting events, etc.
- **Definite Room Night:** Room nights associated with groups that have a signed contract or letter of commitment with the convention center and or a signed contract with a hotel.
- **Tentative Room Night:** Room nights associated with groups that have indicated interest in holding a meeting or convention in Hawai'i and a lead has been sent to the convention center and/or the hotels. Citywide leads are considered tentative when space is blocked at the convention center. Includes leads generated by partners at HVCB coordinated trade shows.
- **Economic Impact:** The direct and induced spending generated from a group meeting in Hawai'i. The economic impact formulas are based on research of attendee spending patterns.
- **Lead-to-Booking Conversion:** Conversion of tentative leads into definite bookings as measured by dividing tentative room nights generated in the month/year by definite room nights for the same month/year.
- **Consumed Room Night:** Room nights generated from groups that have convened in Hawai'i. For citywide events, this figure is calculated from the number of attendees. For single property meetings, the figure is the contracted room nights.
- **Goal:** A level of achievement that has been determined through the goal setting process that includes industry stakeholders and the HTA board.
- **International Markets:** Current areas of focus for international groups. These markets are supported by contractors of HTA.
- **New to Hawai'i – New Business:** A group that has never met, or has not had a single property meeting in Hawai'i over the past five years or a citywide meeting within the past 10 years.
- **Repeat Business:** A group that has had a single property meeting in Hawai'i within the past five years or a citywide meeting in Hawai'i within the past 10 years.

- **Island Distribution:** The breakdown of room nights that have been booked on the neighboring islands. This includes Maui, Kaua'i, O'ahu and the Island of Hawai'i.
- **Pace:** A calculation that evaluates the annual sales activity level by comparing production to the same time frames for previous years. This calculation shows if the current year-to-date room night bookings are at the same or higher/lower levels than the past year.
- **Need Period:** A future timeframe where the projections for room night demand are lower, therefore warranting specific sales strategies to attract business.
- **Lost Business:** A group where a lead has been generated due to client interest and Hawai'i was not chosen for the meeting or convention.
- **Total Events:** Total licensed events held at the Hawai'i Convention Center.
- **Total Attendance:** Total delegate attendees at licensed events at the Hawai'i Convention Center.
- **Visitor Spending:** State economic impact of offshore licensed events.
- **Tax Generation:** State tax generation of offshore licensed events.

March - May 2020

Contract No.	Contractor	Description	Contract Amount	Total Contract Value	Start Date	End Date
14002 S9	AEG Management HCC, LLC dba Hawai'i Convention Center	Hawai'i Convention Center	\$ 11,966,255.00	\$ 141,146,758.00	2/12/2020	12/31/2020
*20192	USS Missouri Memorial Association, Inc. dba Battleship Missouri Memorial	75th Commemoration of the Ending of WWII	\$ 500,000.00	\$ 500,000.00	2/12/2020	12/31/2020
*20184	University of Hawai'i at Mānoa, Shidler College of Business, School of Travel Industry Management	Ho'oilina Scholarship Program	\$ 408,000.00	\$ 408,000.00	3/12/2020	6/30/2023
18187 S2	YouGov America Inc.	Evaluation of 2019 Festivals and Events	\$ 383,272.50	\$ 1,138,545.00	1/24/2020	7/31/2021
17031 S3	Visitor Aloha Society of Hawai'i	Visitor Assistance Program - O'ahu 2020	\$ 370,000.00	\$ 1,374,000.00	3/18/2020	4/1/2021
19007 S2	SMS Research & Marketing Services, Inc.	Statewide Domestic In-flight Visitors' Basic Characteristic Survey CY 2020	\$ 314,799.56	\$ 638,184.12	2/5/2020	6/30/2023
19188 S1	YouGov America Inc.	Syndicated Tourism Survey Services 2020	\$ 293,000.00	\$ 586,000.00	1/24/2020	8/31/2022
*20194	United States Tennis Association Incorporated dba USTA	Davis Cup - United States vs. Uzbekistan 2020	\$ 200,000.00	\$ 200,000.00	2/20/2020	12/31/2020
17208 S3	North Shore Lifeguard Association	Statewide JR. Lifeguard Program 2020	\$ 200,000.00	\$ 800,000.00	3/4/2020	12/31/2020
18153 S3	The Waikiki Improvement Association	Kūhiō Beach Hula and Torch Lighting (RAHC)	\$ 200,000.00	\$ 525,000.00	3/25/2020	3/31/2021
17032 S3	VASH Hawai'i Island	Visitor Assistance Program - Island of Hawai'i 2020	\$ 170,000.00	\$ 614,000.00	3/25/2020	4/1/2021
*20204	Aha Pūnana Leo dba 'ahā Pūnana Leo, Inc.	Kula Kamali'i Equipment & Supplies 2020	\$ 165,175.00	\$ 165,175.00	4/7/2020	4/30/2021
*20208	Tapiki, LLC	COVID-19 Diagnostic Mobile Application Tool	\$ 157,065.00	\$ 157,065.00	5/6/2020	12/31/2020
*20193	Students and Parents of JCHS Marching Band	Campbell Highschool Marching Band Participation in the National Independence Day Parade	\$ 150,000.00	\$ 150,000.00	2/25/2020	9/30/2020
17191 S4	Aloha Week Hawai'i, Incorporated dba Aloha Festivals	Aloha Festivals 2020	\$ 150,000.00	\$ 600,000.00	3/4/2020	2/28/2021
20177	DLNR - Division of Forestry and Wildlife	Mokuhāli'i: Covering the Islands in the Rapid 'Ōhi'a Death Outreach Network	\$ 148,000.00	\$ 148,000.00	2/3/2020	3/31/2021
20196	Anthology Marketing Group	Hawai'i's Visitor Industry Workforce Needs Assessment	\$ 131,937.00	\$ 131,937.00	3/12/2020	8/31/2020
*19140 S1	Kaua'i Lifeguard Association	Lifeguard Support Program	\$ 125,000.00	\$ 250,000.00	4/7/2020	12/31/2020
19162 S2	ZR Systems Group LLC dba ZR Systems	IT Support Services	\$ 104,694.00	\$ 230,802.55	5/4/2020	3/31/2022
20205	Council for Native Hawaiian Advancement	Online Pop-Up Mākeke 2020	\$ 100,000.00	\$ 100,000.00	4/13/2020	9/30/2020
*20198	The Merrie Monarch Festival dba Merrie Monarch Festival	Merrie Monarch Festival 2020	\$ 100,000.00	\$ 100,000.00	3/3/2020	12/31/2020
20161	'Āina Momona	'Āina Momona 2020 Aloha 'Āina Fellowship Program	\$ 100,000.00	\$ 100,000.00	3/9/2020	3/31/2021
*20191	University of Hawai'i	Hawai'i AgTourism Initiative	\$ 93,868.00	\$ 93,868.00	3/16/2020	4/30/2021
*20202	Council for Native Hawaiian Advancement	King Kamehameha Celebration 2020	\$ 90,000.00	\$ 90,000.00	4/7/2020	12/31/2020
18177 S2	OmniTrak Research & Marketing Group Inc.	Marketing Effectiveness Study 2020	\$ 82,741.00	\$ 248,223.00	1/24/2020	4/24/2023
*20185	University of Hawai'i at West O'ahu	Ho'oilina Scholarship Program West O'ahu	\$ 80,000.00	\$ 80,000.00	3/12/2020	6/30/2023
20127	Kalihi-Pālama Culture & Arts Society, Inc.	45th Annual Queen Liliuokalani Keiki Hula Competition	\$ 80,000.00	\$ 80,000.00	3/9/2020	3/31/2021
20159	The Nature Conservancy	Expanding Marine Conservation in Maui County to Meet 30x30 Targets	\$ 75,000.00	\$ 75,000.00	2/24/2020	3/31/2021
20197	Council for Native Hawaiian Advancement	Prince Kūhiō Festival 2020	\$ 75,000.00	\$ 75,000.00	2/24/2020	12/31/2020
17005 S3	City & County of Honolulu	City & County of Honolulu Enrichment Program	\$ 70,000.00	\$ 280,000.00	2/4/2020	3/31/2021
17006 S3	County of Kaua'i	County of Kaua'i Enrichment Program	\$ 70,000.00	\$ 280,000.00	2/4/2020	3/31/2021
20179	University of Hawai'i	Rapid 'Ōhi'a Death Seed Banking Initiative 2020	\$ 60,000.00	\$ 60,000.00	2/14/2020	3/31/2021
20122	Friends of Ka Leo Hawaii Media	Ka Leo: The Voice of Hawaii (KKNE 940AM)	\$ 60,000.00	\$ 60,000.00	3/16/2020	3/31/2021
17033 S3	Visitor Aloha Society of Kaua'i, Inc.	Visitor Assistance Program - Kaua'i 2020	\$ 55,000.00	\$ 214,000.00	3/30/2020	4/1/2021
17034 S3	Maui County Visitors Association dba Maui Visitors Bureau	Visitor Assistance Program - Maui 2020	\$ 55,000.00	\$ 193,000.00	3/25/2020	4/1/2021
19199 S1	ODKF Support Inc. dba Duke's Oceanfest	19th Annual Duke's Oceanfest 2020	\$ 50,000.00	\$ 100,000.00	2/20/2020	3/31/2021
20171	Sustainable Coastlines Hawai'i	From Beaches to the Classroom: Growing a Plastic Free Movement	\$ 50,000.00	\$ 50,000.00	2/13/2020	3/31/2021
20132	Mu'olaulani dba Hālau Hula Ka No'eau	I Le'a Ka Hula 2020: Celebrating Culture, Preserving Traditions	\$ 50,000.00	\$ 50,000.00	2/20/2020	2/28/2021
20143	Hawai'i Museums Association	Mākau Mo'omeheu: Cultural Competence in Hawai'i's Museums	\$ 50,000.00	\$ 50,000.00	2/28/2020	3/31/2021
*20199	Kāhuli Leo Le'a	Hawaiian Airlines May Day 2020: Make a Lei	\$ 50,000.00	\$ 50,000.00	3/9/2020	12/31/2020
19168 S1	County of Kaua'i	Nāwiliwili Kahea Harbor Greetings 2020	\$ 46,475.00	\$ 88,475.00	3/25/2020	3/31/2021

20164	Hui o Ko'olaupoko	Mālama Muliwai o Heeia: Phase 2	\$ 40,000.00	\$ 40,000.00	2/10/2020	9/30/2020
17192 S4	Big Island Resource Conservation and Development Council	Hawai'i Island Festival - 30 Days of Aloha 2020	\$ 40,000.00	\$ 160,000.00	2/26/2020	12/31/2020
19165 S1	Hilo Hawai'i Visitor Industry Association, Inc. dba Destination Hilo	Hilo Kahea Harbor Greetings 2020	\$ 40,000.00	\$ 80,000.00	3/25/2020	3/31/2021
19198 S1	Lokahi Pacific	Festivals of Aloha - Maui Nui Style 2020	\$ 40,000.00	\$ 80,000.00	3/25/2020	12/31/2020
20064	Hawai'i Performing Arts Festival Inc.	Hawai'i Performing Arts Festival 2020 Season	\$ 35,000.00	\$ 35,000.00	1/30/2020	12/31/2020
19166 S1	Destination Kona Coast	Kona Kahea Harbor Greetings 2020	\$ 31,500.00	\$ 59,500.00	3/25/2020	3/31/2021
20124	Hika'alani	Pai Puke	\$ 30,000.00	\$ 30,000.00	2/3/2020	3/31/2021
17031 S4	Visitor Aloha Society of Hawai'i	Visitor Assistance Program - O'ahu 2020 - COVID-19	\$ 25,000.00	\$ 1,399,000.00	4/13/2020	4/1/2021
18155 S3	Hilo Hawai'i Visitor Industry Association, Inc. dba Destination Hilo	Hilo Hula Tuesday 2020 (RAHCI)	\$ 25,000.00	\$ 80,000.00	3/18/2020	3/31/2021
19177 S1	Kailua Village Business Improvement District, Inc.	Hawaiian Sunset Saturday (RAHCI)	\$ 24,000.00	\$ 48,000.00	3/18/2020	3/31/2021
20077	Hānapepe Economic Alliance	Kaua'i Chocolate & Coffee Festival 2020	\$ 22,000.00	\$ 22,000.00	2/28/2020	3/31/2021
18156 S3	The Lahaina Restoration Foundation	Hawaiian Music Series (RAHCI)	\$ 20,800.00	\$ 58,800.00	3/18/2020	3/31/2021
20093	Friends of King Kaumuali'i	He Inoa No Kaumuali'i-Na Makana Poina'ole	\$ 20,000.00	\$ 20,000.00	2/10/2020	11/30/2020
*20001 S1	Na Wahine O Ke Kai	Na Wahine O Ke Kai 2020	\$ 20,000.00	\$ 40,000.00	2/12/2020	2/28/2021
*20002 S1	O'ahu Hawaiian Canoe Racing Association Hawai'i	Moloka'i Hoe 2020	\$ 20,000.00	\$ 40,000.00	3/25/2020	3/31/2021
20105	Laupāhoehoe Train Museum	Hawaiian Cultural Center of Hāmākua	\$ 20,000.00	\$ 20,000.00	3/5/2020	3/31/2021
19167 S1	Lahaina Town Action Committee	Lahaina Kahea Harbor Greetings 2020	\$ 20,000.00	\$ 40,000.00	3/25/2020	3/31/2021
20131	Kua'aina Ulu 'Auamo dba KUA	Ko'olau 'Āina Momona	\$ 19,000.00	\$ 19,000.00	2/28/2020	3/31/2021
†20207	Hawaii Foodbank, Inc.	Hawai'i Foodbank Security	\$ 16,000.00	\$ 16,000.00	4/2/2020	6/15/2020
20035	Young of Heart Workshop dba Pu'uuhonua Society	CONTACT 2020	\$ 15,000.00	\$ 15,000.00	1/30/2020	4/30/2021
20026	Blane K Gaison dba MC Events LLC	Hawai'i Makahiki Series	\$ 15,000.00	\$ 15,000.00	2/12/2020	4/30/2021
20090	The Storybook Theatre of Hawai'i	Princess Ka'iulani Keiki Hula & Story Fest	\$ 15,000.00	\$ 15,000.00	2/24/2020	4/30/2021
19006 S2	OmniTrak Research & Marketing Group Inc.	Visitor Departure Survey 2020	\$ 13,967.96	\$ 915,842.96	3/18/2020	6/30/2023
†19173 S2	North Star Research Corp dba HVS Convention, Sports & Entertainment Facilities Consulting	Market / Futures Study of the Hawai'i Convention Center	\$ 13,750.00	\$ 126,650.00	3/25/2020	12/31/2020
20010 S1	Anthology Marketing Group, Inc	Public Relations, Communications, and Outreach Services	\$ 12,000.00	\$ 157,000.00	2/14/2020	12/31/2020
†20189	Hawai'i Alliance of Nonprofit Organizations	Statewide Training Series: Proposal Writing & Financial Management	\$ 11,500.00	\$ 11,500.00	2/24/2020	7/31/2020
20020	Hawai'i Scottish Festival and Highland Games	Hawaiian Scottish Association	\$ 5,000.00	\$ 5,000.00	2/10/2020	7/31/2020
17032 S4	VASH Hawai'i Island	Visitor Assistance Program - Island of Hawai'i 2020	\$ 2,700.00	\$ 616,700.00	4/20/2020	4/1/2021
17029 S11	Hawai'i Visitors and Convention Bureau	USA MMA 2020	\$ -	\$ 97,060,000.00	1/24/2020	12/31/2021
*18162 S2	PGA Tour, Inc.	PGA TOUR Events (Sentry Tournament of Champions, The Sony Open, and the Mitsubishi Electric Championship)	\$ -	\$ 8,647,481.00	2/21/2020	12/31/2022
*19143 S1	County of Hawai'i	Lifeguard Support Program	\$ -	\$ 125,000.00	2/26/2020	3/31/2020
20196 S1	Anthology Marketing Group	Hawai'i's Visitor Industry Workforce Needs Assessment	\$ -	\$ 131,937.00	3/25/2020	2/28/2021
20190	Boingo Wireless, Inc.	Neutral Host Distributed Antenna Service	\$ -	\$ -	3/16/2020	1/31/2030
*18135 S4	ClimbHI	LEI Program (Lead, Expose, Inspire) 2020	\$ -	\$ 254,000.00	3/25/2020	10/31/2021
18187 S3	YouGov America Inc. dba SMG Insight/YouGov	Evaluation of 2020 Festivals and Events	\$ -	\$ 1,138,545.00	3/25/2020	5/10/2023
19169 S2	Maui Nui Marine Resource Council, Inc. dba Maui Nui Marine Resource Council	Maui Coral Reef Sign Project	\$ -	\$ 47,144.00	5/4/2020	12/31/2020
20006 S1	ITRAVLOCAL LIMITED	Hawai'i Tourism Inbound Destination Marketing Management Services in the China Major Market Area	\$ (1,000,000.00)	\$ 1,000,000.00	4/1/2020	12/31/2022
			\$ 17,292,500.02			

Contract Type:
• Sole Source
† Procurement Exemption

5

Presentation and Discussion of Current
Market Insights and Conditions in
Hawai'i and Key Major Hawai'i Tourism
Markets, Including the United States,
Japan, Canada, Oceania, Other Asia,
Europe, and Cruise



Market Insights – February 2020

The HTA Monthly Market Insights reports on the most recent key performance indicators that the Hawai'i Tourism Authority (HTA) uses to measure success. The following measures provide indicators of the overall health of Hawai'i's visitor industry and help to gauge if the HTA is successfully attaining its goals.

Report on Economic Impact

NOTE: February 2020 data included an extra leap-year day. To directly compare with February 2019 statistics, visitor spending data listed here is expressed on a per day basis, and the average daily census is used as a measure of visitor volume, where applicable.

For the first two of 2020, Hawai'i's tourism economy experienced:

- Total visitor spending grew (+4.8% to \$3.17 billion), representing an average of \$52.9 million per day (+3.1%) versus \$51.3 million per day year-over-year.
- Total visitor arrivals rose 5.5 percent to 1,690,630, supported by growth in arrivals from air service (+5.7% to 1,665,003) which offset fewer arrivals by cruise ships (-7.9% to 25,627). Total visitor days¹ rose 3.0 percent compared to the first two months of 2019.
- The average daily census (i.e. number of visitors on any given day) also increased (+1.3%) to 260,059 visitors per day.
- Hawai'i's tourism economy experienced \$370.2 million in generated state tax revenue, up 4.8 percent (+\$17.1 million) compared to the first two months of 2019.
- Through December 2019, the state collected \$319.7 million in TAT, an increase of 13.1% compared to FY 2019 through December 2018.
- Total air capacity (scheduled and charter seats) into Hawai'i grew 7.7 percent to 2,309,705 seats.

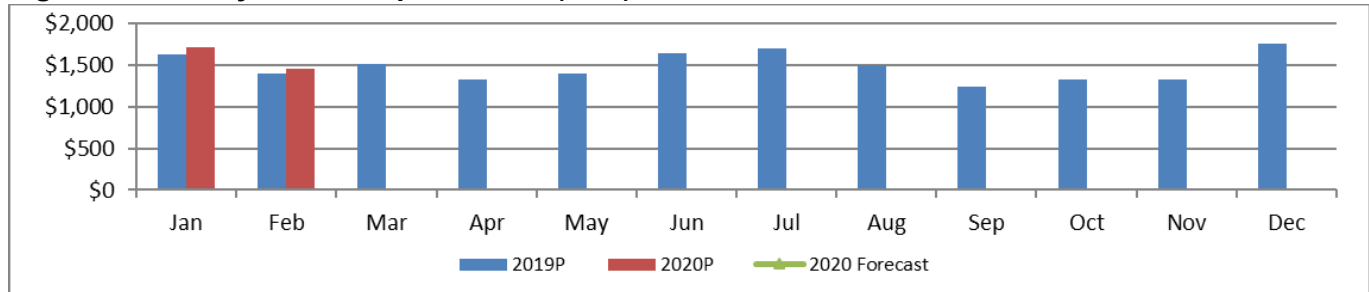
Table 1: Overall Key Performance Indicators – Total (Air + Cruise) – YTD February 2020

	% of Forecast	YOY Rate	Feb. YTD	Forecast
Visitor Spending (\$mil)*	NA	4.8%	3,171.7	NA
Daily Spend (\$pppd)	NA	1.8%	203.3	NA
Visitor Days	NA	3.0%	15,603,533	NA
Arrivals	NA	5.5%	1,690,630	NA
Airlift (scheduled seats)	NA	7.7%	2,297,034	NA

DBEDT 2020 forecasts were not available at the time of report publication.

¹ Aggregate number of days stayed by all visitors.

Figure 1: Monthly Visitor Expenditures (\$mil)



Major Market Areas (MMAs)

USA

Table 2: Key Performance Indicators - U.S. Total

	% of Forecast	YOY Rate	Feb. YTD	Forecast
Visitor Spending (\$mil)*	NA	11.7%	2,120.3	NA
Daily Spend (\$pppd)	NA	3.0%	201.0	NA
Visitor Days	NA	8.5%	10,549,492	NA
Arrivals	NA	11.6%	1,102,204	NA
Airlift (scheduled seats)	NA	13.2%	1,634,007	NA

DBEDT 2020 forecasts were not available at the time of this report.

- According to the Longwoods Travel Sentiment Study Wave 2 (fielded March 18-19), 75 percent of those planning to travel in the next 6 months will change their plans due to the Coronavirus (compared to 58% in the March 11 survey). 48 percent of them are cancelling completely (compared to only 28% on March 11).
- In preparation for implementation of the mandatory quarantine for visitors that started March 26, wholesalers continue to reach out to customers to rebook or cancel reservations; some airlines confirmed they have sent messages to ticketholders about the quarantine.
- As of March 26, US became the #1 country for COVID-19 cases - Johns Hopkins reported 85,840 cases (+16,880), 1,296 deaths. Domestic air service dropped sharply with some flights arriving into Hawai'i with no or single digit visitors.
- All U.S. domestic carriers have extended grounding of the Boeing MAX through September 2020 at the earliest.

US WEST

Table 3: Key Performance Indicators - U.S. West

	% of Forecast	YOY Rate	Feb. YTD	Forecast
Visitor Spending (\$mil)*	NA	12.3%	1,194.6	NA
Daily Spend (\$pppd)	NA	2.6%	187.0	NA
Visitor Days	NA	9.5%	6,389,161	NA
Arrivals	NA	12.2%	708,041	NA
Airlift (scheduled seats)	NA	11.3%	1,402,176	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- In February 2020, U.S. West spending (+9.7% to \$19.8 million per day) and the average daily census (+7.7% to 105,233 visitors per day) increased, compared to a year ago.

US EAST

Table 4: Key Performance Indicators - U.S. East

	% of Forecast	YOY Rate	Feb. YTD	Forecast
Visitor Spending (\$mil)*	NA	10.9%	925.7	NA
Daily Spend (\$pppd)	NA	3.7%	222.5	NA
Visitor Days	NA	6.9%	4,160,331	NA
Arrivals	NA	10.4%	394,163	NA
Airlift (scheduled seats)	NA	26.4%	231,831	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- U.S. East visitor spending (+8.6% to \$14.4 million per day) and the average daily census (+4.3% to 65,827 visitors per day) also rose in February year-over-year.

CANADA

Table 5: Key Performance Indicators – Canada

	% of Forecast	YOY Rate	Feb. YTD	Forecast
Visitor Spending (\$mil)*	NA	-4.2%	305.1	NA
Daily Spend (\$pppd)	NA	1.1%	179.1	NA
Visitor Days	NA	-5.2%	1,703,014	NA
Arrivals	NA	-3.4%	129,309	NA
Airlift (scheduled seats)	NA	-7.6%	127,254	NA

DBEDT 2020 forecasts were not available at the time of report publication

- In February 2020, Canada visitor spending (-7.3% to \$5.0 million per day) and the average daily census (-7.0% to 27,223 visitors per day) declined.
- With a population of over 36 million, Canadians made 20.3 million overnight trips to the U.S. throughout 2019, compared to almost 20.0 million in 2018.
- The loonie has been fairly stable so far this year at 75.3 cents U.S., the year-to-date value is 3.0 percent lower than recorded throughout the same period in 2018. Canadians have gotten used to the price of the American Dollar, after a lot of fluctuation in 2018 and early 2019.
- The 737 MAX 8 landing has significantly affected Canadian carriers, the most affected are specifically Air Canada's flights on the West Coast. All Canadian carriers have extended grounding of the Boeing MAX through September 2020 at the earliest.
- As of March 27, both Air Canada and WestJet have suspended air service to Hawai'i until April 30 due to the COVID-19 situation. However, this is subject to change due to government policy regarding travel restrictions and border closing.

JAPAN

Table 6: Key Performance Indicators – Japan

	% of Forecast	YOY Rate	Feb. YTD	Forecast
Visitor Spending (\$mil)*	NA	3.9%	348.3	NA
Daily Spend (\$pppd)	NA	1.0%	240.7	NA
Visitor Days	NA	2.9%	1,447,028	NA
Arrivals	NA	3.2%	248,896	NA
Airlift (scheduled seats)	NA	1.7%	338,034	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- In February 2020, Japan visitor spending (-2.9% to \$5.7 million per day) and the average daily census declined (-4.1% to 23,395 visitors per day), versus a year ago.
- The exchange rate was at 109.96 JPY to USD in February 2020, maintaining relative stability. Economists forecast the Japanese Yen to moderately advance over the US Dollar. This may lead to greater perceived purchasing power amongst Japanese travelers.
- The economic impact of the Coronavirus is speculated to surpass that of the SARS outbreak in 2003. The decline in inbound travelers to Japan is forecasted to result in loss of consumption up to 300 billion yen each month. Travel restrictions imposed by Japan on Chinese and Korean travelers are especially contributing to this loss as they accounted for close to 50 percent of the share in consumption by visitors.
- The Coronavirus outbreak continues to spread in Japan with over 860 recorded cases. Major events and attractions continue to be canceled or closed in efforts mitigate the spread of the virus. The 2020 Tokyo Olympics have been postponed until June 2021.
- The travel industry is taking significant hits as travel restrictions are imposed by various countries. Travel to Hawai'i has been declining since the news of a couple traveling back from Hawai'i, confirmed to have contracted the Coronavirus. The cancellations were further spurred when confirmed cases of the Coronavirus were announced in Hawai'i. Travel is expected to stop almost entirely with Governor Ige's proclamation requesting all nonessential travels to Hawai'i be canceled.
- Various airlines are reducing and/or suspending flights as travel demand declines. A list of currently announced flight changes are as follows:
 - All Nippon Airways: Suspension of daily service from Haneda – Honolulu (4/5 – 4/24)
 - Delta Air Lines: Reduction of service from 5 to 3 weekly flights from Nagoya – Honolulu (3/7 – 4/30). Reduction of service from 7 to 3 weekly flights from Kansai – Honolulu (3/7 – 4/30)
 - Hawaiian Airlines: Suspension of 4x/week service from Haneda – Honolulu (3/30 – 4/30). Suspension of thrice weekly service from Haneda – Kona (3/29 – 4/29). Suspension of thrice weekly service from New Chitose – Honolulu (4/2 – 7/20). Reduction of service from 7 to 6 weekly flights from Kansai – Honolulu (4/2 – 4/28). 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 3/20 – 3/27. 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). Suspension of daily service from Haneda – Honolulu (4/8 – 4/23)

OCEANIA

Table 7: Key Performance Indicators – Oceania

	% of Forecast	YOY Rate	Feb. YTD	Forecast
Visitor Spending (\$mil)*	NA	-3.8%	114.5	NA
Daily Spend (\$pppd)	NA	0.0%	260.0	NA
Visitor Days	NA	-3.8%	440,334	NA
Arrivals	NA	-2.3%	47,306	NA
Airlift (scheduled seats)	NA	-8.2%	72,685	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- Australia: The average daily census declined (-4.5% to 4,885 visitors per day) in February and through the first two months (-7.1% to 6,146 visitors per day) compared to a year ago.
- Australia's economy, infrastructure, population and wildlife are still recovering from the devastating bushfires over the past five months. The economic damage is expected to exceed AU\$3 Billion. GDP could fall by 0.25%-1%, which would leave growth for the year almost flat. The effect of the coronavirus on China's economy is set to have a knock-on impact to the Australian dollar as a key trading partner. Since the start of this year, the Australian dollar has lost almost five cents to sit at US\$0.655 at the end of February, the lowest level since 2009.
- There has been an increase in the number of flights available from Australia to U.S. destinations, resulting in very competitive fares and providing travelers with more choice on where to holiday in the USA.
- New Zealand: The average daily census increased (+10.9% to 886 visitors per day) in February and through the first two months (+4.4% to 1,193 visitors per day) compared to a year ago.
- The outbreak of Coronavirus continues to have an impact on business sectors within the NZ economy. Economists are predicting a downturn in the economy, although likely to be short and shallow with growth resuming and continuing in the second half of the year. As a result, the NZ Reserve Bank is preparing to cut interest rates to help stimulate growth. The month saw a decline in the value of the NZ dollar versus the US\$ as the exchange rate is \$0.62.
- Outbound travel from New Zealand continues to grow, exceeding 3 million trips in a calendar year.

EUROPE

Table 8: Key Performance Indicators – Europe

	% of Forecast	YOY Rate	Feb. YTD	Forecast
Visitor Spending (\$mil)*	NA	-11.0%	29.9	NA
Daily Spend (\$pppd)	NA	-6.4%	138.9	NA
Visitor Days	NA	-5.0%	215,633	NA
Arrivals	NA	1.3%	16,587	NA
Airlift (scheduled seats)	NA	NA	NA	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- The average daily census from the United Kingdom, France, Germany, Italy and Switzerland (3,859 visitors per day) in February was virtually unchanged compared to a year ago.

Through the first two months of 2020 the average daily census decreased (-6.6% to 3,594 visitors per day).

- On January 31, 2020 the UK left the European Union (EU). Prime Minister Boris Johnson has vowed to bring the country together and move it “forward”. There will be a transitional period for the remainder of the year, when the UK will be allowed to negotiate new trade deals with other countries, whilst also discussing a free trade deal with the EU.
- Under the UK-EU deal following Brexit, British families can rest assured that everything will stay the same as when the UK was still an EU member. British citizens can still travel freely with a passport until the end of the transition period in 2020. There will be no additional border checks so airport queues should not be longer, and the current Great Britain passport will be valid until date of expiry. Changes to travel after the transition period starting in 2021 will be decided in the negotiations on the EU-UK relationship.
- GDP in Germany improved toward the end of 2019 but still reported its slowest economic growth in 6 years. The Gross Domestic Product of Germany grew 0.6 percent in 2019 compared to 2018.
- Due to the COVID-19 situation, a European travel ban was put into effect as of March 13, 2020, to last 30 days or until terminated by the President, which did not initially include the United Kingdom and Ireland.
- Effective March 16, the United Kingdom and Ireland were added to the European travel ban.
- The German government has now extended the travel ban for international and domestic trips until April 30, 2020, to be reviewed again at a later date.

CHINA

Table 9: Key Performance Indicators – China

	% of Forecast	YOY Rate	Feb. YTD	Forecast
Visitor Spending (\$mil)*	NA	N/A	N/A	NA
Daily Spend (\$pppd)	NA	N/A	N/A	NA
Visitor Days	NA	-57.0%	86,091	NA
Arrivals	NA	-56.8%	9,746	NA
Airlift (scheduled seats)	NA	-62.9%	8,176	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- February 2020 was the beginning of flight cancellations to the islands due to the Covid-19 pandemic. The greatest impact was felt by the China market which saw only two direct flights to Hawai'i for the entire month due to a travel ban on Chinese citizens to the U.S. Due to limited samples collected, visitor spending data will not be released for the first two months of 2020.
- The average daily census plummeted (-91.4% to 310 visitors per day) in February and through the first two months (-57.7% to 1,435 visitors per day) compared to a year ago.
- China remains the world's second-largest economy and tops the world in economic growth (+6.1% YOY) in 2019. China may revise down its annual economic growth target for 2020 in response to the impact of the coronavirus outbreak, but will still not give up the overall target of maintaining economic growth “in a reasonable range”, according to a Chinese government researcher.

- The outbreak of COVID-19 in China has caused an unprecedented and substantial setback in flight bookings. Chinese airline passenger numbers slumped by 84.5 percent in February 2020, highlighting the huge economic impact of the coronavirus outbreak. China's aviation regulator said on March 12, 2020 that the drop has caused a 21 billion yuan fall in revenue. Earlier this week the Chinese government announced fresh measures to support its struggling carriers. The Civil Aviation Administration of China (CAAC) said it will provide subsidies to Chinese airlines and give additional funding for international flights. Take-off and landing charges are also being reduced to help carriers cut costs during the downturn, while airport infrastructure spending will be increased by 100 billion yuan during 2020.
- Chinese airlines are resuming international flights from March. China Southern Airlines will resume air route from Guangzhou to San Francisco from March 20, with four flights per week. China Southern Airlines will resume air route from Shenzhen to Bangkok from March 13, with one daily flight. Air China will resume over 1,600 domestic and international flights. China Eastern Airlines plans to resume daily flights from China to Los Angeles and New York, 4 flights per week from China to Chicago and San Francisco in April.
- Asiana Airlines is expected to resume all flights from China to Korea at the end of April. From HTC's B2B online webinars, some travel agencies are planning to develop Hawai'i products. HTC and Asiana Airlines Shanghai office are working together to restart the yearly plan on Mono- Hawai'i products targeting travel period from July to December.

KOREA

Table 10: Key Performance Indicators – Korea

	% of Forecast	YOY Rate	Feb. YTD	Forecast
Visitor Spending (\$mil)*	NA	-19.5%	83.6	NA
Daily Spend (\$pppd)	NA	2.2%	257.5	NA
Visitor Days	NA	-21.3%	324,768	NA
Arrivals	NA	-21.2%	39,214	NA
Airlift (scheduled seats)	NA	-7.0%	59,519	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- The average daily census decreased (-20.8% to 5,027 visitors per day) in February and through the first two months (-22.6% to 5,413 visitors per day) compared to a year ago.
- Major international investment banks (IBs) and economic institutes have forecasted South Korea's economic growth below 2 percent in 2020 due to the fallout of COVID-19.
- The average USD/WON exchange rate in February was 1192.17 won, a slight increase from the previous rate of 1162.43 won in January. Fuel surcharges were imposed in February up to 98,400 won (US\$80.83) for a round trip between Korea and the U.S.
- Korea Tourism Organization (KTO) reported that the estimated number of Korean outbound travelers in January 2020 was 2,513,030, a year-on-year decline of 13.7 percent.
- While the situation in Korea has improved dramatically over the past 30 days. However, outbreaks at workplaces are still seen, COVID-19 inflows from overseas are growing, and group infection remains an issue, most industry watchers project that it will take, at minimum, another month before Korea can declare the COVID-19 crisis of 2020 behind it.

- HTK has developed 6-Month Contingency Plan with strategies of Interim (March), Reassure (April to May), Reignite (June to July) and Invite (August) responsive to COVID-19 pandemic situation.
- HTK to deliver following tactics during March – Interim Period:
 - Pause B2B and B2C marketing programs except social media management.
 - Keep social media posts to a minimum (2 times a week) with carefully selected travel-inspiring contents but no call to action.
 - Continue to monitor COVID-19 situation, especially outbreak status in major travel source markets such as Seoul and Busan.
 - Communicate travel guidance offered by HTA, CDC and U.S. officials to consumers, media and travel agencies.
 - Handle Hawai'i partner inquiries and maintain close communication with key stakeholders.

TAIWAN

Table 11: Key Performance Indicators – Taiwan

	% of Forecast	YOY Rate	Feb. YTD	Forecast
Visitor Spending (\$mil)*	NA	-31.4%	6.5	NA
Daily Spend (\$pppd)	NA	-17.4%	221.0	NA
Visitor Days	NA	-16.9%	29,455	NA
Arrivals	NA	-14.6%	3,025	NA
Airlift (scheduled seats)	NA	0.0%	5,202	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- The average daily census declined (-35.2% to 369 visitors per day) in February and in the first two months (-18.3% to 491 visitors per day) compared to a year ago.
- Taiwan has caught international attention as being the most prepared and effective in dealing with coronavirus outbreak. Daily press conferences are held by the government with transparency of COVID-19 to the general public. National medical system is also prepared to fight with the crisis.
- A bill that allows \$60 billion NTD spending has been planned by the Executive Yuen, the administrative body of Taiwan's central government, to help revive and sustain industries that may be affected by the COVID-19 outbreak, and to support medical staff and hospitals.
- Due to the development of COVID-19 into pandemic in the world, there is a dampening in travel sentiments with restrictions imposed by governments, causing a huge loss of revenue to airlines. The drop in overall demand in Europe and USA have led to China Airlines and EVA Air both announcing their cutting down of flight frequency to include major North America routes. China Airlines will temporarily suspend Taipei to Honolulu flights between March 31 to April 30.
- Many events and activities in Taiwan are postponed or cancelled during the outbreak of COVID-19. It is advised by the government not to host major events to protect people from group transmission.

LATIN AMERICA

Table 122: Key Performance Indicators – Latin America

	% of Forecast	YOY Rate	Feb. YTD	Forecast
Visitor Spending (\$mil)*	NA	-3.8%	10.9	NA
Daily Spend (\$pppd)	NA	4.7%	244.2	NA
Visitor Days	NA	-8.2%	44,510	NA
Arrivals	NA	-0.5%	4,256	NA
Airlift (scheduled seats)	NA	N/A	N/A	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- The average daily census from Mexico, Brazil and Argentina declined (-5.3% to 611 visitors per day) in February and through the first two months (-9.7% to 742 visitors per day) compared to a year ago

ISLAND VISITATION:

- **O‘ahu** : In February, visitor spending declined (-7.8% to \$20.3 million per day) and the average daily census fell 2.1 percent to 108,859 visitors per day year-over-year. For the first two months of 2020, visitor spending decreased (-4.5% to \$21.5 million per day) and the average daily census dropped slightly (-0.6% to 114,095 visitors per day) compared to a year ago.
- **Maui**: In February, visitor spending increased (+7.3% to \$15.9 million per day) and the average daily census rose slightly (+0.7% to 67,650 visitors per day) year-over-year. Year-to-date, visitor spending was up (+7.5% to \$16.2 million per day) and the average daily census was slightly ahead of a year ago (+1.0% to 69,281 visitors per day).
- **Island of Hawai‘i**: In February, both visitor spending (+10.7% to \$7.6 million per day) and the average daily census (+5.8% to 40,149 visitors per day) increased compared to a year ago. Year-to-date, both visitor spending (+12.5 percent to \$8.5 million per day) and the average daily census (+7.0% to 43,366 visitors per day) were up compared to the same period a year ago.
- **Kaua‘i**: In February, visitor spending grew (+7.8% to \$5.9 million per day) and the average daily census increased (+2.2% to 29,063 visitors per day). Year-to-date, visitor spending increased (+8.2% to \$6.0 million per day) and the average daily census rose slightly (+0.9% to 29,407 visitors per day) compared to a year ago.

Hawai'i Tourism Authority Report Date: **Feb-20** *Preliminary*

Visitor Industry Performance Measures

Market: **OVERALL**

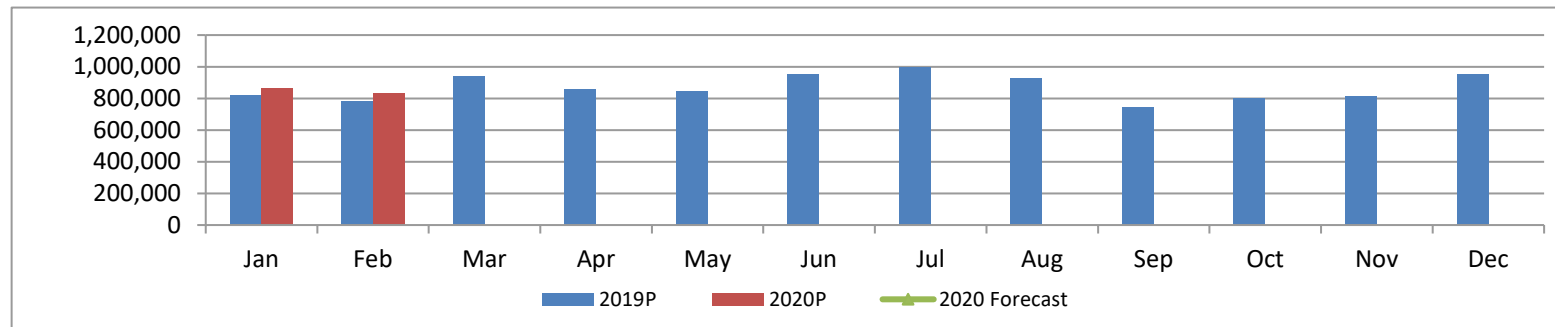
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	4.8%	3,171.7	N/A	O'ahu	3.8%	984,707
Daily Spend (\$pppd)	N/A	1.8%	203.3	N/A	Maui	4.8%	477,244
Visitor Days	N/A	3.0%	15,603,533	N/A	Moloka'i	7.1%	11,937
Arrivals	N/A	5.5%	1,690,630	N/A	Lāna'i	-2.8%	12,242
Airlift (scheduled seats)	N/A	7.7%	2,297,034	N/A	Kaua'i	6.7%	224,816
					Hawai'i Island	8.3%	311,749

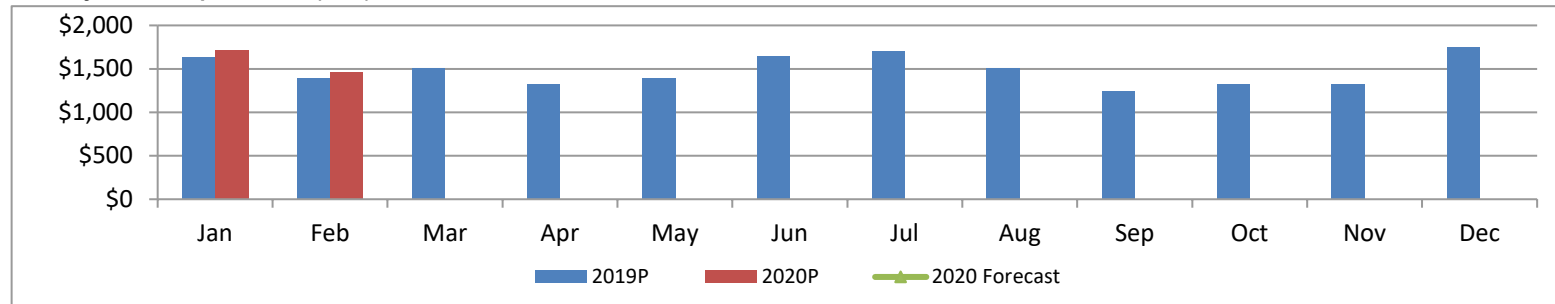
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

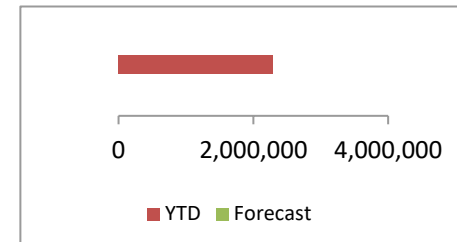
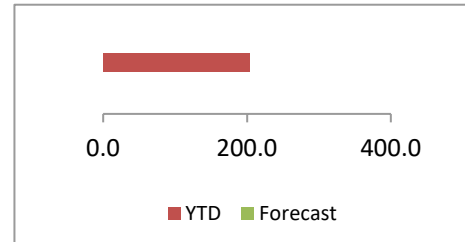
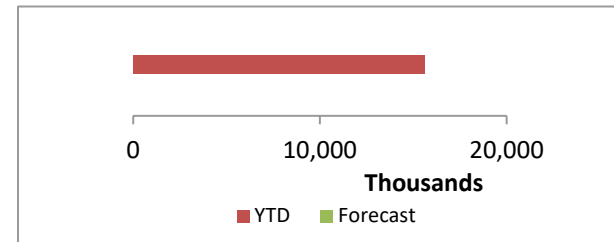


Monthly Visitor Expenditures (\$mil)



Annual Indicators

YTD Visitor Days, YTD Daily Spend (\$ per person per day), YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

Hawai'i Tourism Authority Report Date: **Feb-20** *Preliminary*

Visitor Industry Performance Measures

Market: **U.S. TOTAL**

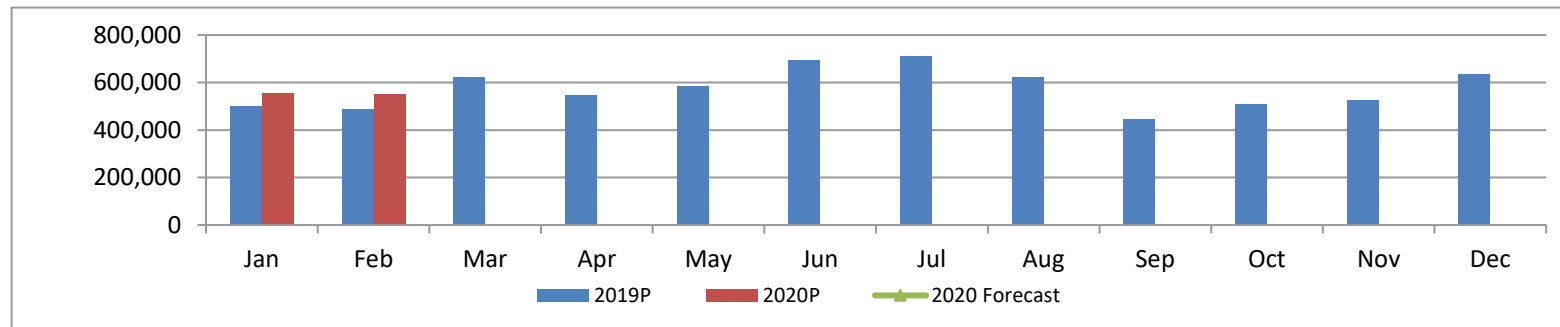
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	11.7%	2,120.3	N/A	O'ahu	13.1%	538,093
Daily Spend (\$pppd)	N/A	3.0%	201.0	N/A	Maui	10.8%	371,333
Visitor Days	N/A	8.5%	10,549,492	N/A	Moloka'i	0.5%	7,735
Arrivals	N/A	11.6%	1,102,204	N/A	Lāna'i	7.2%	9,269
Airlift (scheduled seats)	N/A	13.2%	1,634,007	N/A	Kaua'i	11.3%	184,230
					Hawai'i Island	14.3%	220,839

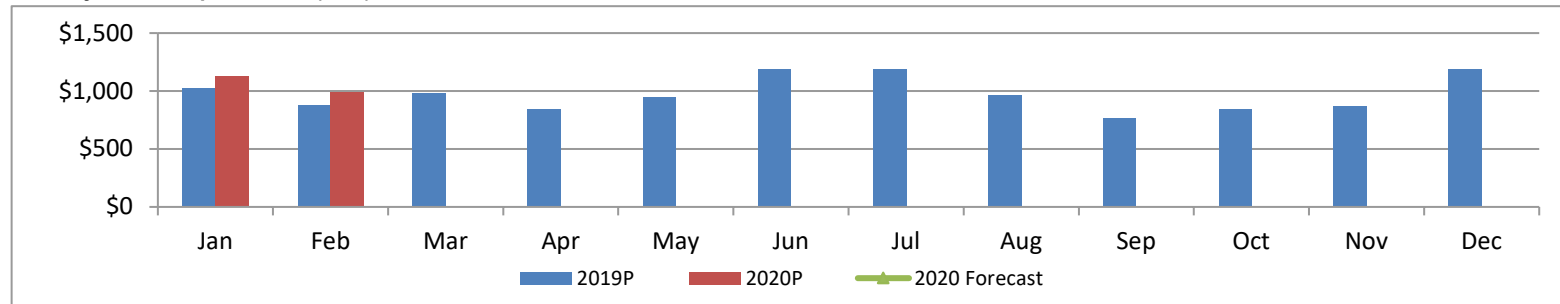
*DBEDT 2020 Forecast not yet available

Monthly Indicators

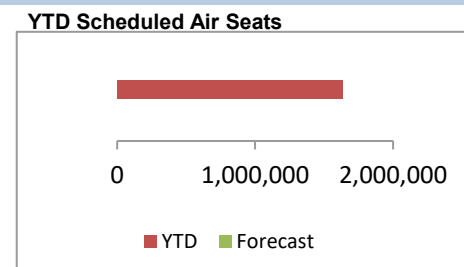
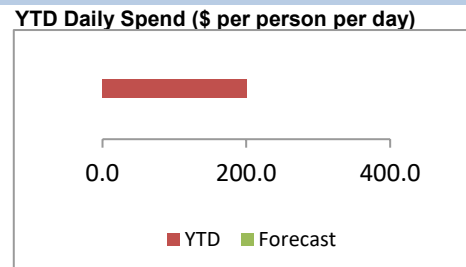
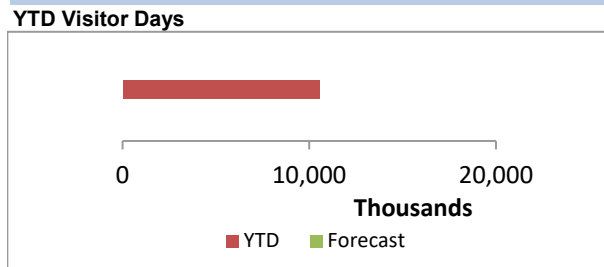
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

Hawai'i Tourism Authority Report Date: **Feb-20** *Preliminary*

Visitor Industry Performance Measures

Market: **U.S. WEST**

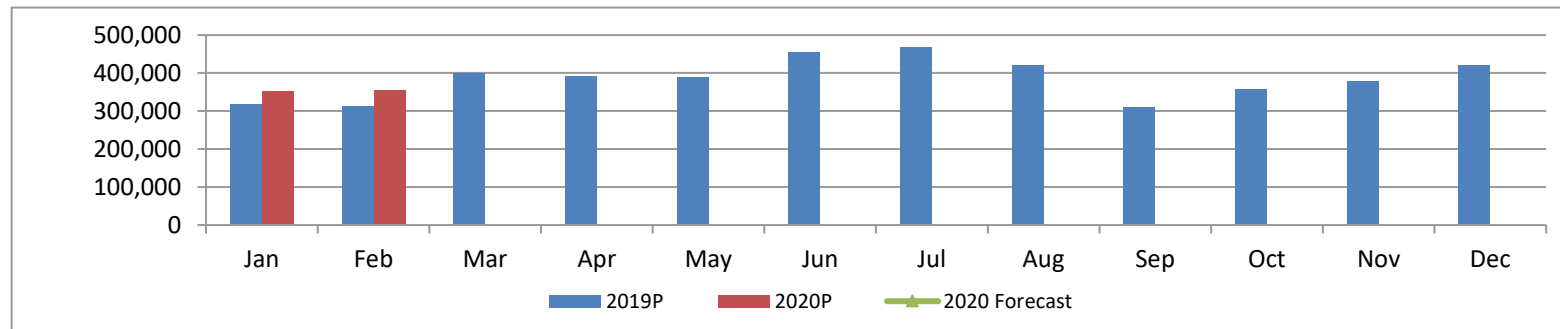
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	12.3%	1,194.6	N/A	O'ahu	13.7%	317,305
Daily Spend (\$pppd)	N/A	2.6%	187.0	N/A	Maui	11.3%	228,858
Visitor Days	N/A	9.5%	6,389,161	N/A	Moloka'i	-0.5%	4,614
Arrivals	N/A	12.2%	708,041	N/A	Lāna'i	10.8%	4,957
Airlift (scheduled seats)	N/A	11.3%	1,402,176	N/A	Kaua'i	13.7%	111,794
					Hawai'i Island	14.0%	136,441

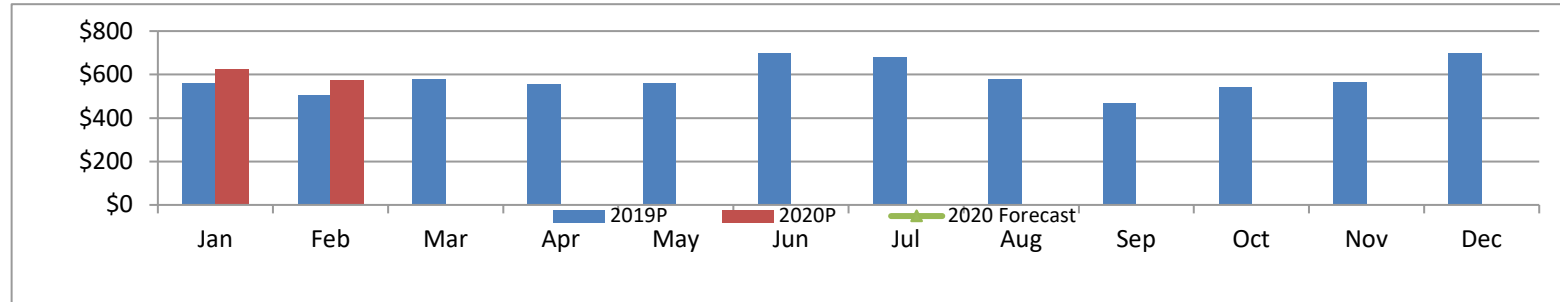
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

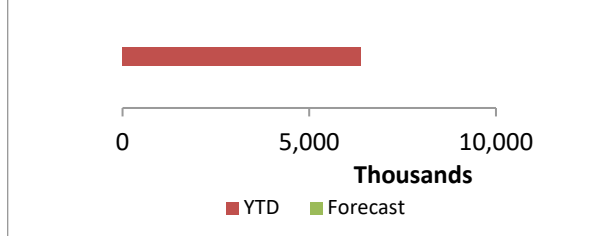


Monthly Visitor Expenditures (\$mil)

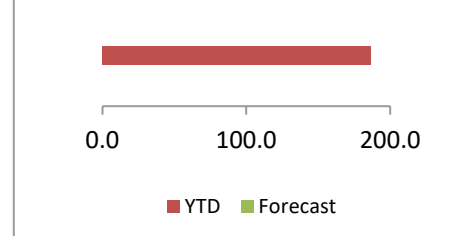


Annual Indicators

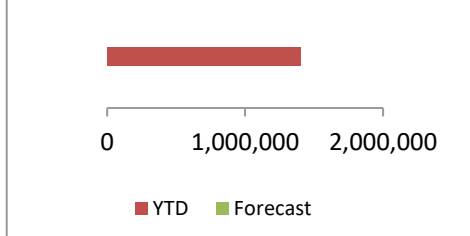
YTD Visitor Days



YTD Daily Spend (\$ per person per day)



YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

Hawai'i Tourism Authority Report Date: **Feb-20** *Preliminary*

Visitor Industry Performance Measures

Market: **U.S. EAST**

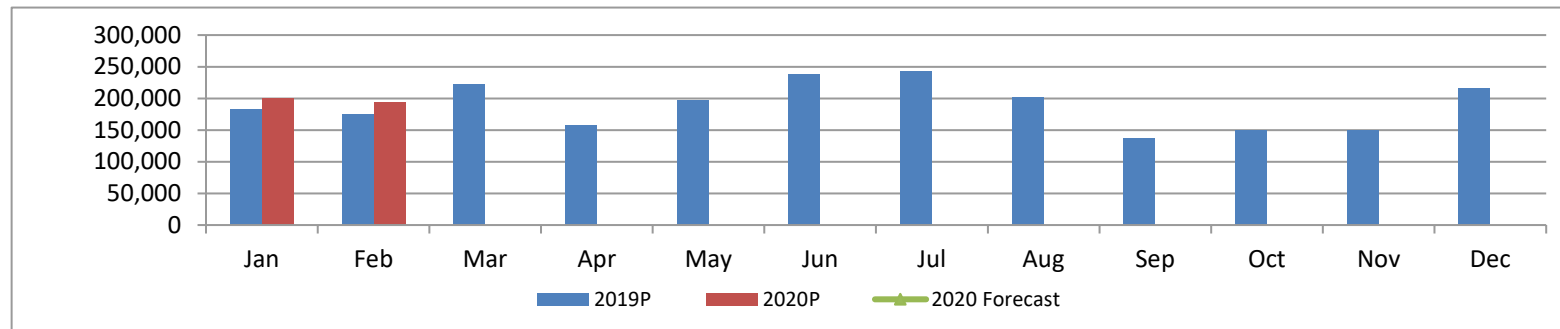
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	10.9%	925.7	N/A	O'ahu	12.2%	220,788
Daily Spend (\$pppd)	N/A	3.7%	222.5	N/A	Maui	9.9%	142,475
Visitor Days	N/A	6.9%	4,160,331	N/A	Moloka'i	1.9%	3,121
Arrivals	N/A	10.4%	394,163	N/A	Lāna'i	3.4%	4,312
Airlift (scheduled seats)	N/A	26.4%	231,831	N/A	Kaua'i	7.8%	72,436
					Hawai'i Island	14.6%	84,398

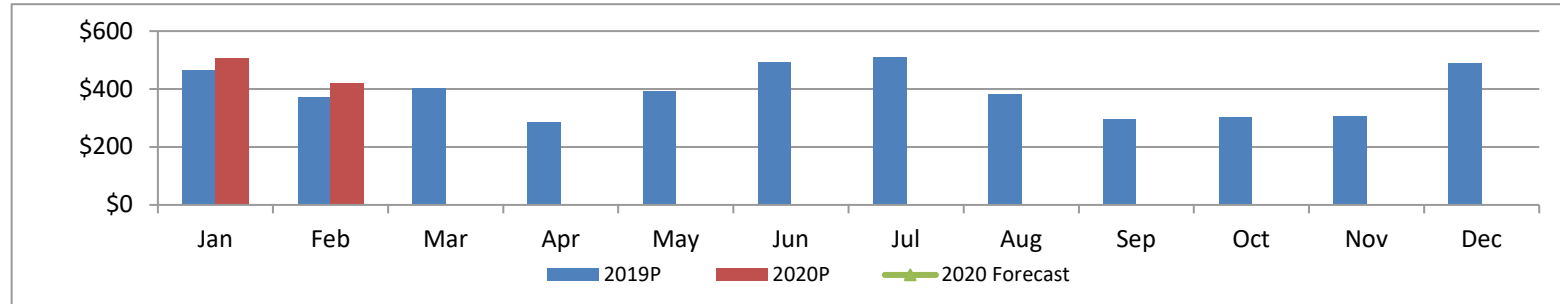
*DBEDT 2020 Forecast not yet available

Monthly Indicators

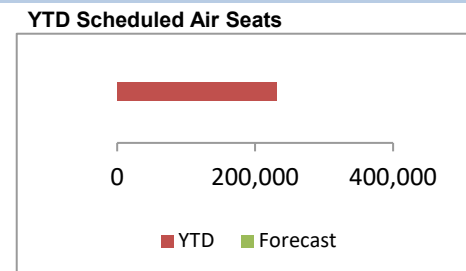
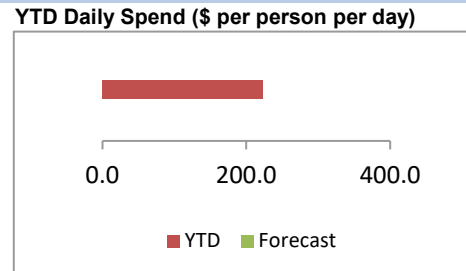
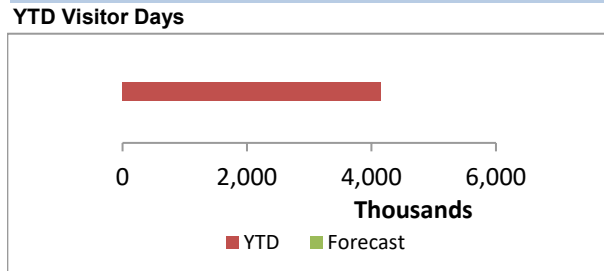
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

Hawai'i Tourism Authority Report Date: **Feb-20** *Preliminary*

Visitor Industry Performance Measures

Market: **CANADA**

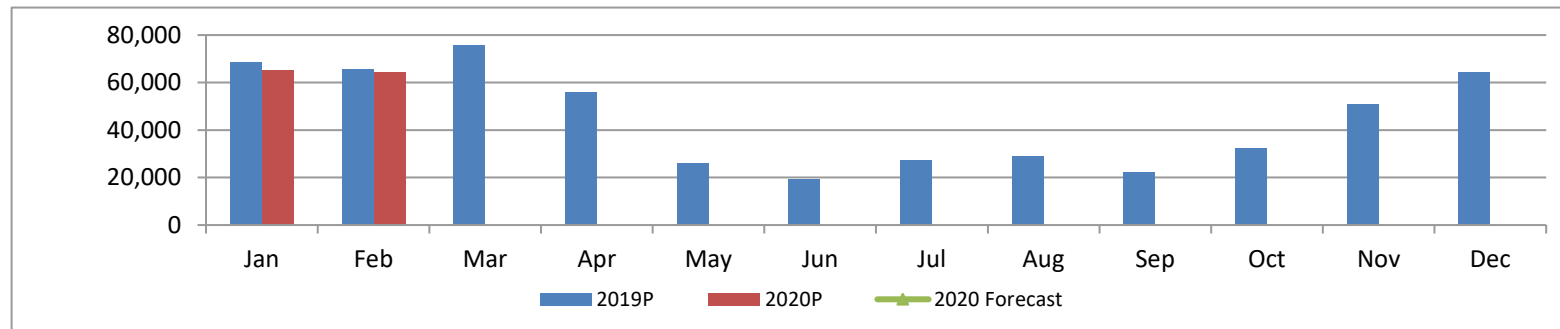
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-4.2%	305.1	N/A	O'ahu	-0.8%	51,670
Daily Spend (\$pppd)	N/A	1.1%	179.1	N/A	Maui	-8.0%	61,025
Visitor Days	N/A	-5.2%	1,703,014	N/A	Moloka'i	-37.7%	883
Arrivals	N/A	-3.4%	129,309	N/A	Lāna'i	-23.1%	1,420
Airlift (scheduled seats)	N/A	-7.6%	127,254	N/A	Kaua'i	-10.9%	18,989
					Hawai'i Island	5.4%	28,033

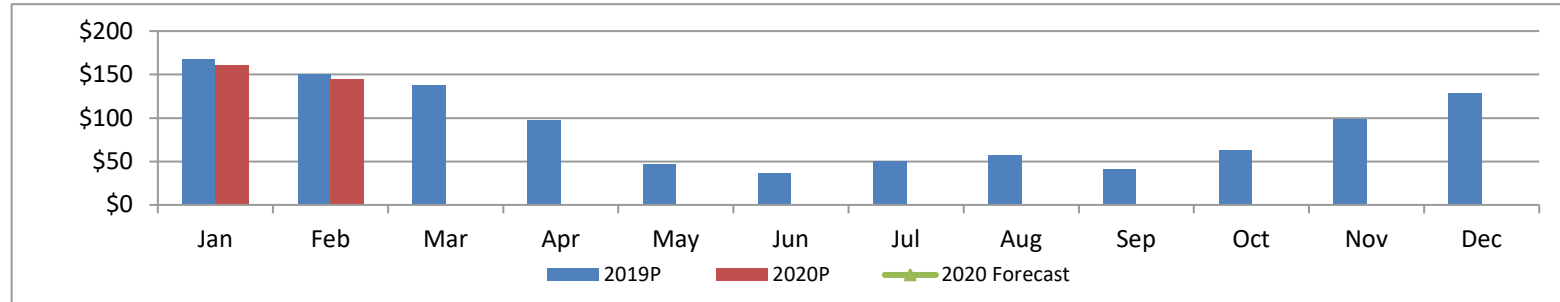
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

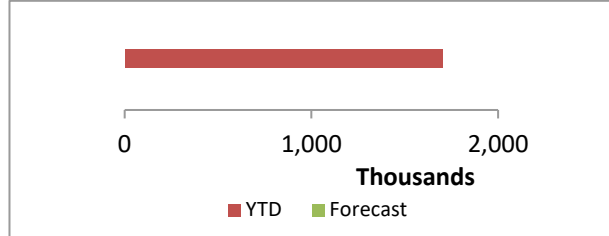


Monthly Visitor Expenditures (\$mil)

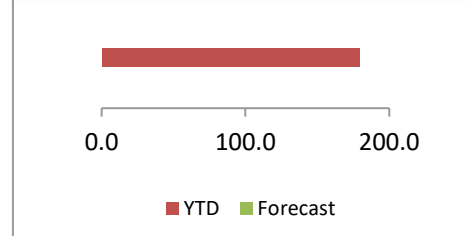


Annual Indicators

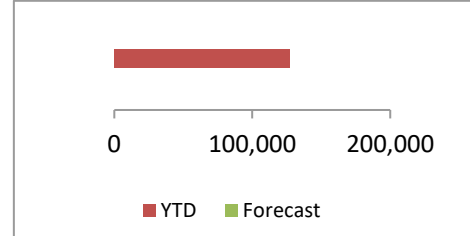
YTD Visitor Days



YTD Daily Spend (\$ per person per day)



YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

DBEDT 2020 Forecast not yet av

Hawai'i Tourism Authority Report Date: **Feb-20** *Preliminary*

Visitor Industry Performance Measures

Market: **JAPAN**

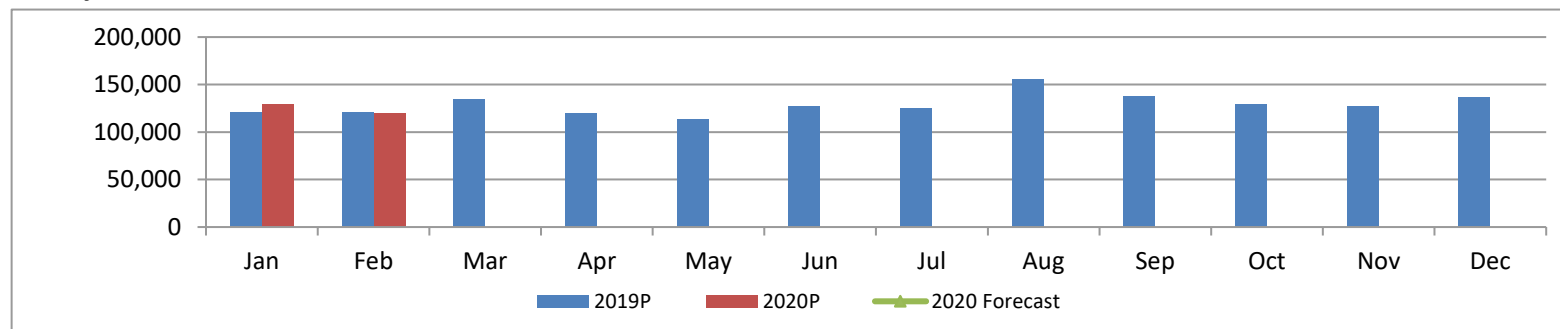
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	3.9%	348.3	N/A	O'ahu	1.1%	232,332
Daily Spend (\$pppd)	N/A	1.0%	240.7	N/A	Maui	-22.6%	6,651
Visitor Days	N/A	2.9%	1,447,028	N/A	Moloka'i	224.4%	392
Arrivals	N/A	3.2%	248,896	N/A	Lāna'i	-61.9%	117
Airlift (scheduled seats)	N/A	1.7%	338,034	N/A	Kaua'i	-31.8%	3,120
					Hawai'i Island	24.8%	30,049

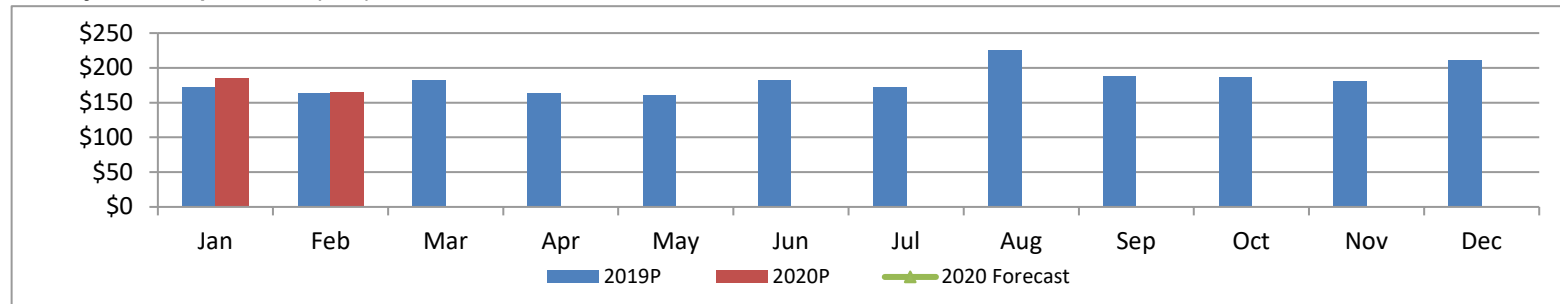
*DBEDT 2020 Forecast not yet available

Monthly Indicators

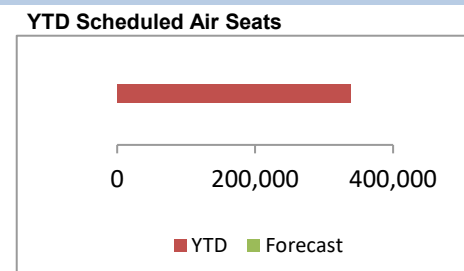
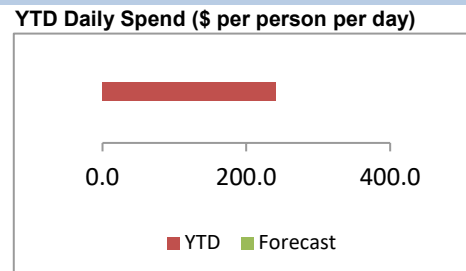
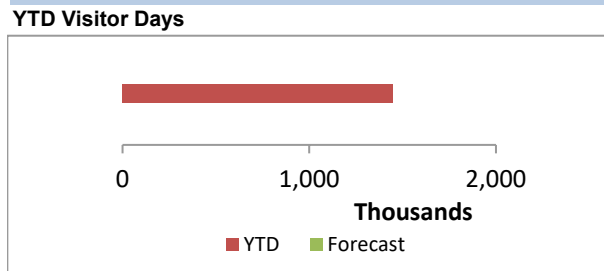
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

Hawai'i Tourism Authority Report Date: **Feb-20** *Preliminary*

Visitor Industry Performance Measures

Market: **CHINA**

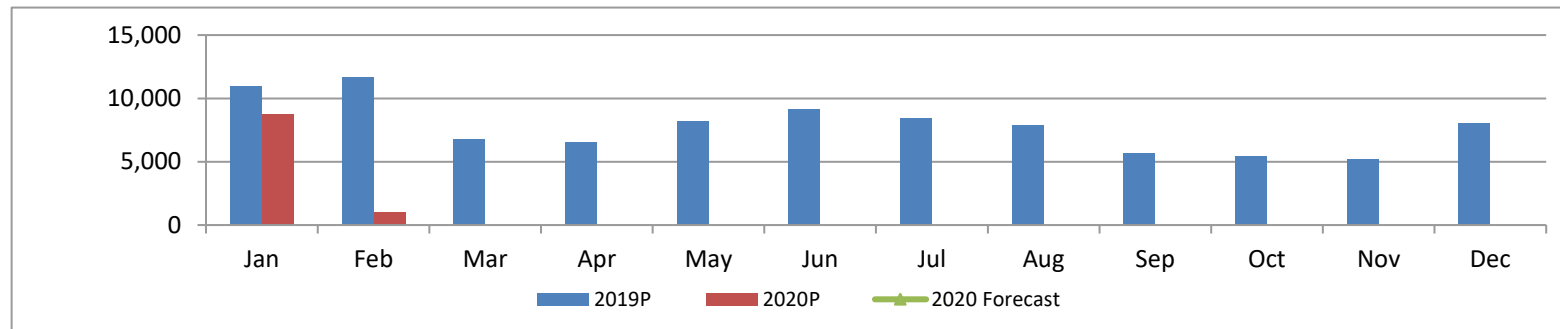
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	#VALUE!	N/A	N/A	O'ahu	-57.1%	9,340
Daily Spend (\$pppd)	N/A	#VALUE!	N/A	N/A	Maui	-60.1%	2,366
Visitor Days	N/A	-57.0%	86,091	N/A	Moloka'i	-42.1%	73
Arrivals	N/A	-56.8%	9,746	N/A	Lāna'i	-79.7%	55
Airlift (scheduled seats)	N/A	-62.9%	8,176	N/A	Kaua'i	-46.4%	592
					Hawai'i Island	-60.4%	3,839

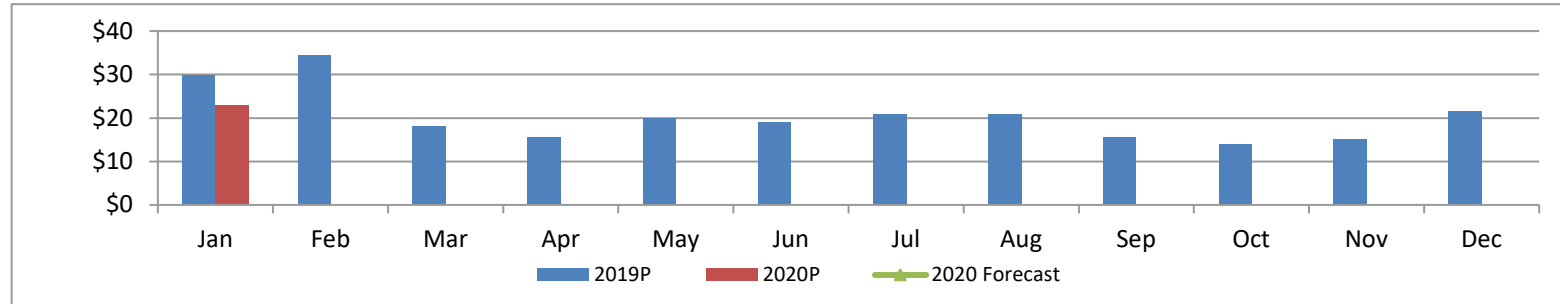
*DBEDT 2020 Forecast not yet available

Monthly Indicators

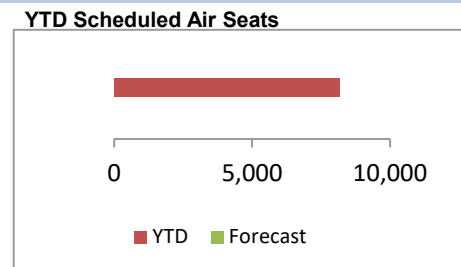
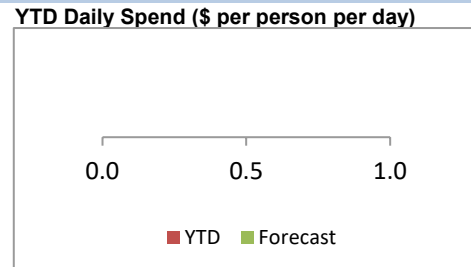
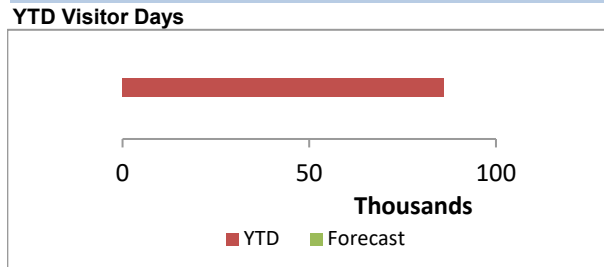
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

Hawai'i Tourism Authority Report Date: **Feb-20** *Preliminary*

Visitor Industry Performance Measures

Market: **KOREA**

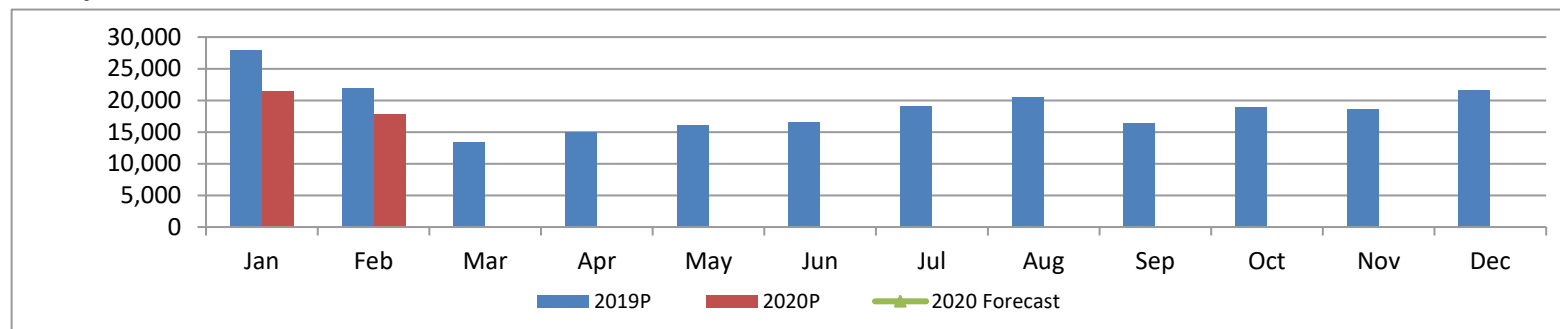
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-19.5%	83.6	N/A	O'ahu	-20.9%	38,753
Daily Spend (\$pppd)	N/A	2.2%	257.5	N/A	Maui	-43.9%	3,851
Visitor Days	N/A	-21.3%	324,768	N/A	Moloka'i	-79.8%	60
Arrivals	N/A	-21.2%	39,214	N/A	Lāna'i	-69.4%	86
Airlift (scheduled seats)	N/A	-7.0%	59,519	N/A	Kaua'i	-40.7%	1,168
					Hawai'i Island	-28.4%	5,782

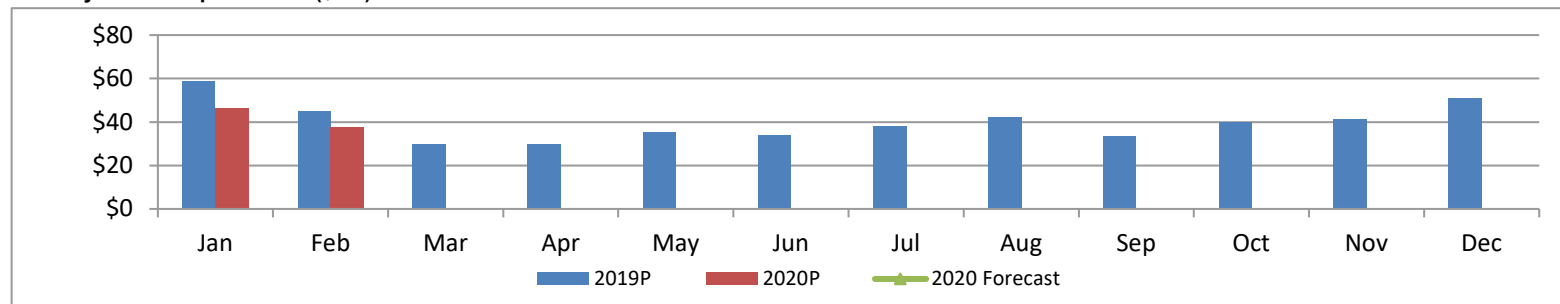
*DBEDT 2020 Forecast not yet available

Monthly Indicators

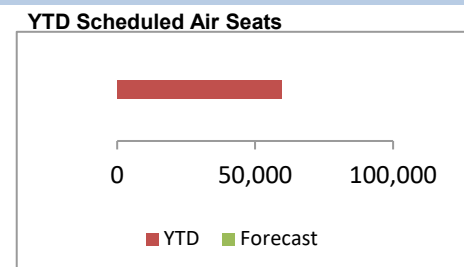
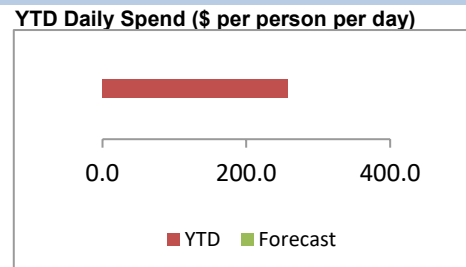
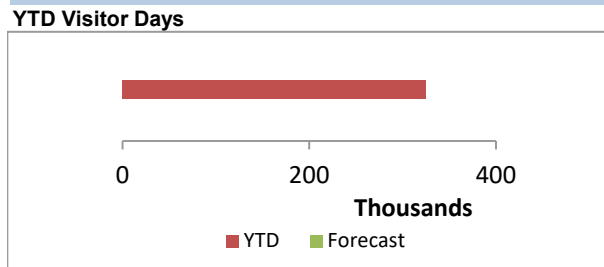
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

Hawai'i Tourism Authority Report Date: **Feb-20** *Preliminary*

Visitor Industry Performance Measures

Market: **TAIWAN**

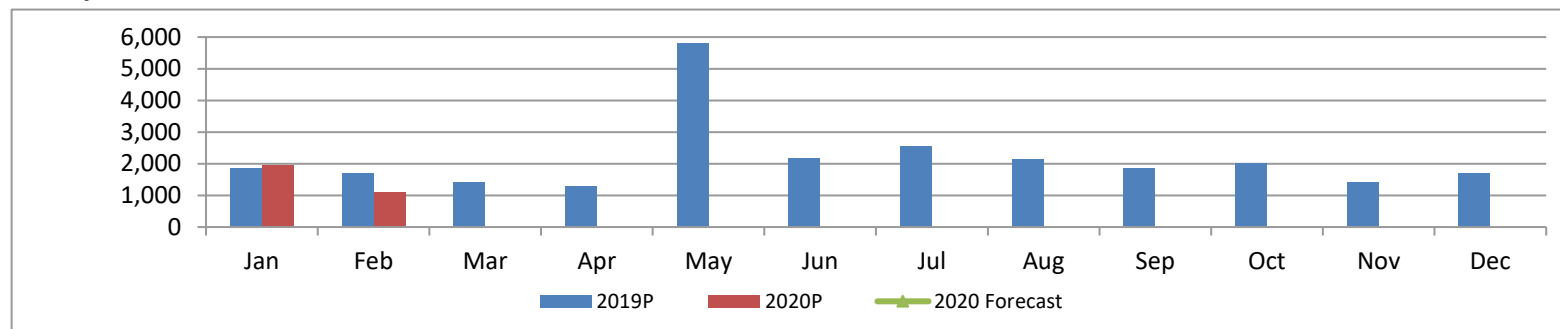
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-31.4%	6.5	N/A	O'ahu	-14.9%	2,944
Daily Spend (\$pppd)	N/A	-17.4%	221.0	N/A	Maui	-40.0%	473
Visitor Days	N/A	-16.9%	29,455	N/A	Moloka'i	N/A	9
Arrivals	N/A	-14.6%	3,025	N/A	Lāna'i	41.0%	3
Airlift (scheduled seats)	N/A	0.0%	5,202	N/A	Kaua'i	-60.6%	129
					Hawai'i Island	43.3%	1,154

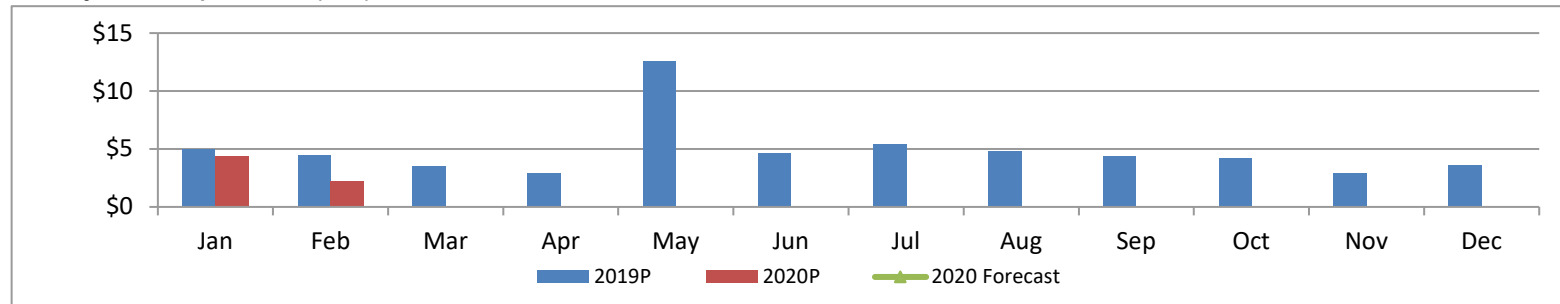
*DBEDT 2020 Forecast not yet available

Monthly Indicators

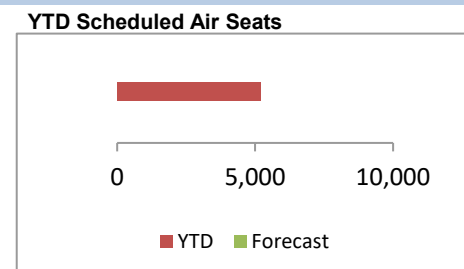
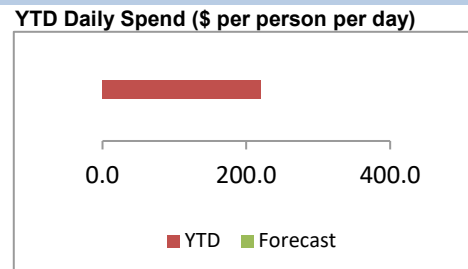
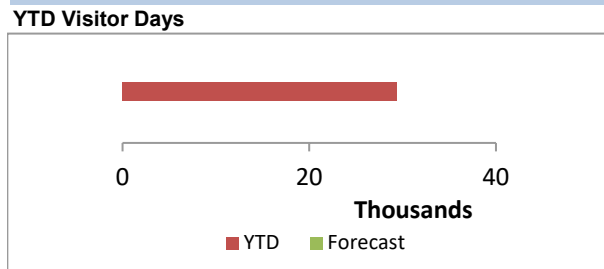
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

Hawai'i Tourism Authority Report Date: **Feb-20** *Preliminary*

Visitor Industry Performance Measures

Market: **OCEANIA**

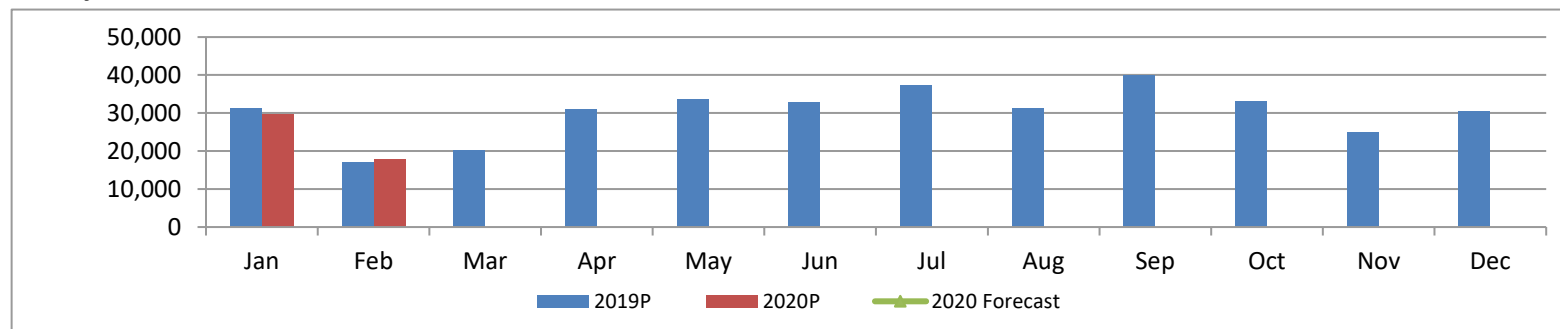
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-3.8%	114.5	N/A	O'ahu	-1.6%	46,336
Daily Spend (\$pppd)	N/A	0.0%	260.0	N/A	Maui	-6.9%	6,819
Visitor Days	N/A	-3.8%	440,334	N/A	Moloka'i	30.1%	760
Arrivals	N/A	-2.3%	47,306	N/A	Lāna'i	-2.2%	775
Airlift (scheduled seats)	N/A	-8.2%	72,685	N/A	Kaua'i	-4.2%	4,127
					Hawai'i Island	34.6%	6,308

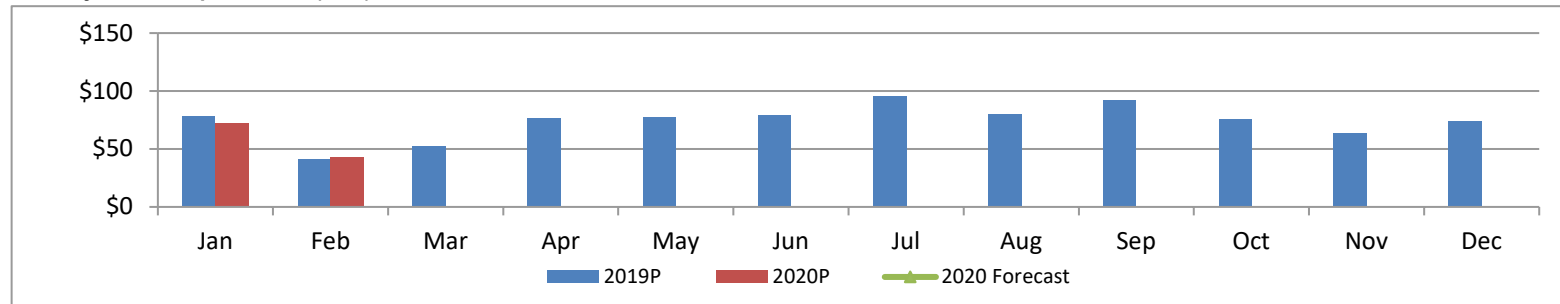
*DBEDT 2020 Forecast not yet available

Monthly Indicators

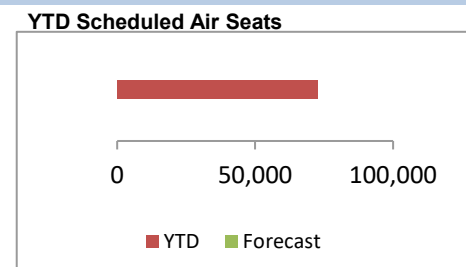
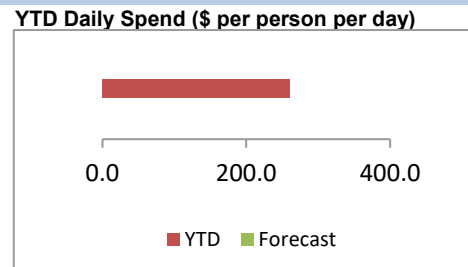
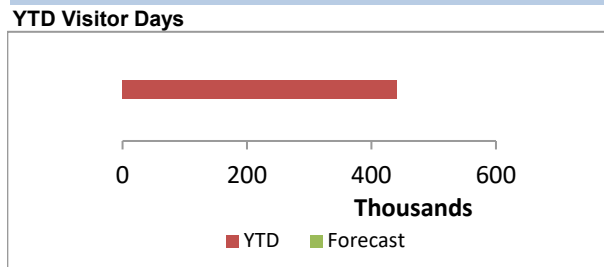
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

Hawai'i Tourism Authority Report Date: **Feb-20** *Preliminary*

Visitor Industry Performance Measures

Market: **EUROPE**

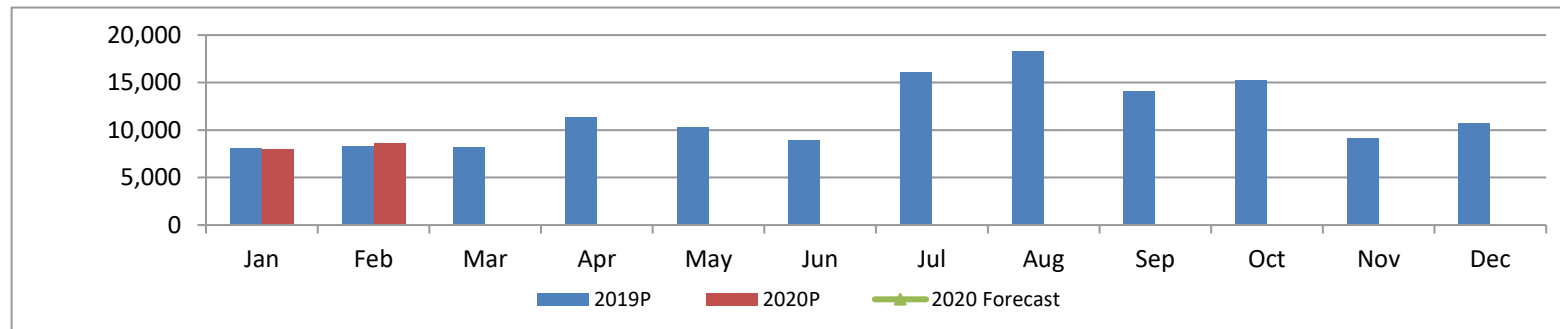
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-11.0%	29.9	N/A	O'ahu	0.6%	11,948
Daily Spend (\$pppd)	N/A	-6.4%	138.9	N/A	Maui	-6.7%	6,759
Visitor Days	N/A	-5.0%	215,633	N/A	Moloka'i	5.2%	255
Arrivals	N/A	1.3%	16,587	N/A	Lāna'i	58.9%	192
Airlift (scheduled seats)	N/A	NA	NA	N/A	Kaua'i	-4.3%	3,902
					Hawai'i Island	3.7%	5,115

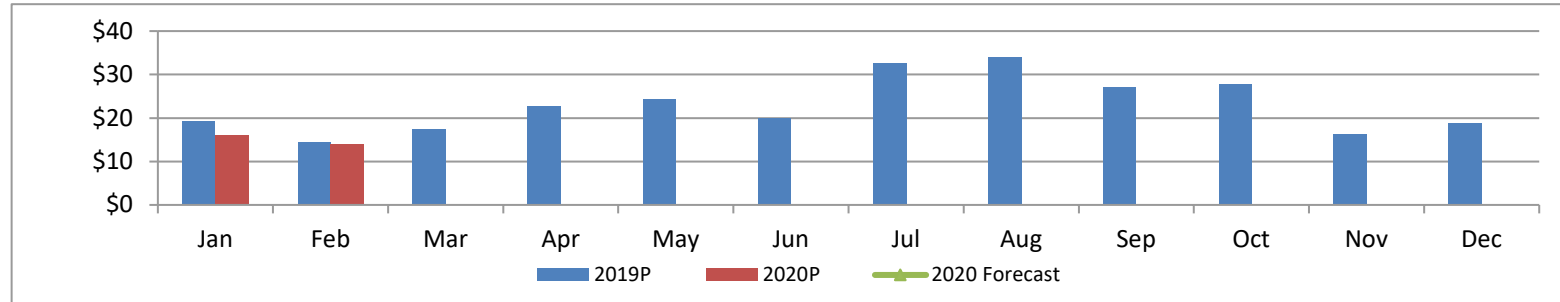
*DBEDT 2020 Forecast not yet available

Monthly Indicators

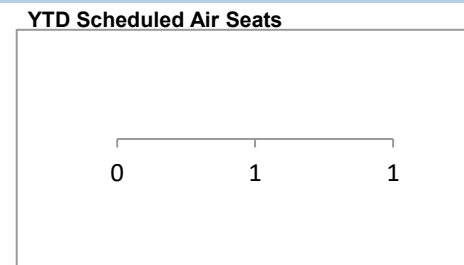
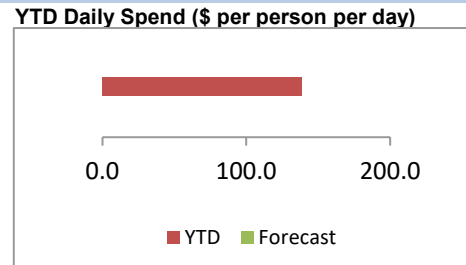
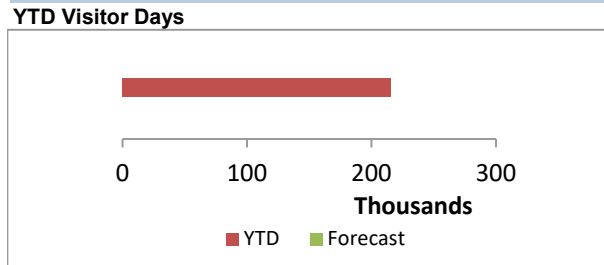
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

Hawai'i Tourism Authority Report Date: **Feb-20** *Preliminary*

Visitor Industry Performance Measures

Market: **LATIN AMERICA**

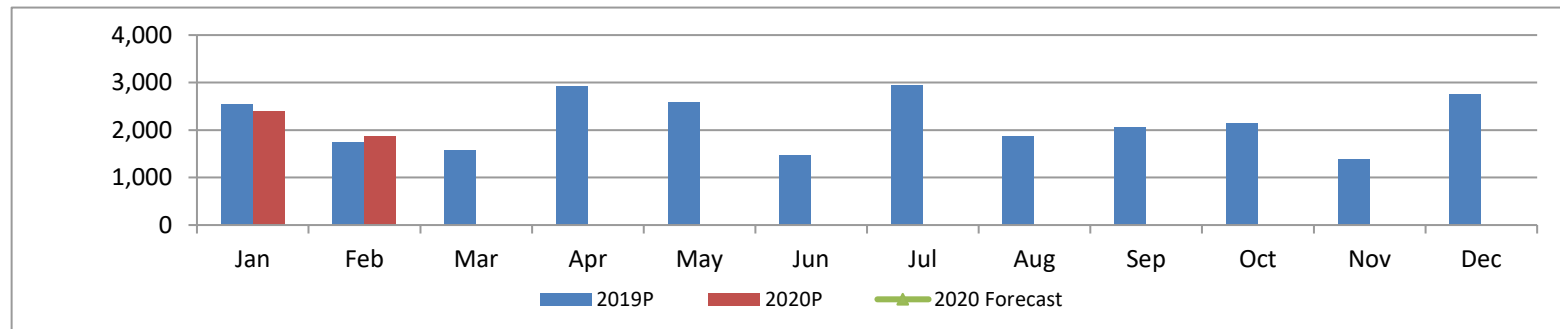
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-3.8%	10.9	N/A	O'ahu	-3.3%	3,290
Daily Spend (\$pppd)	N/A	4.7%	244.2	N/A	Maui	-3.3%	1,452
Visitor Days	N/A	-8.2%	44,510	N/A	Moloka'i	-15.5%	16
Arrivals	N/A	-0.5%	4,256	N/A	Lāna'i	78.6%	33
Airlift (scheduled seats)	N/A	N/A	N/A	N/A	Kaua'i	-3.1%	482
					Hawai'i Island	0.7%	641

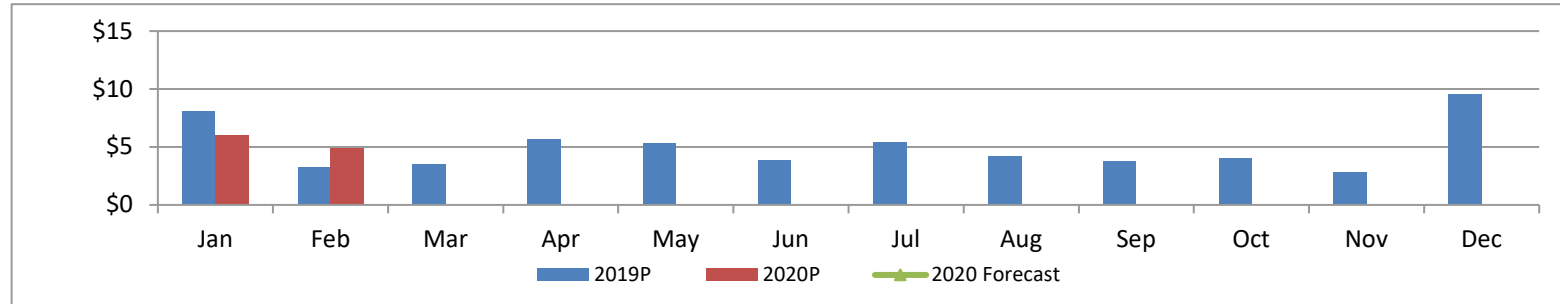
*DBEDT 2020 Forecast not yet available

Monthly Indicators

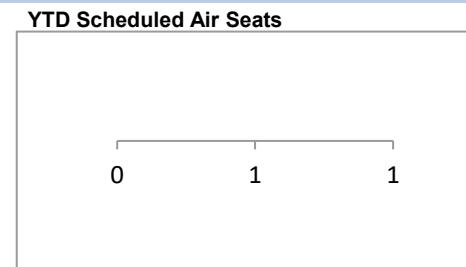
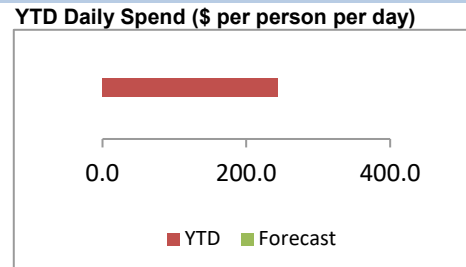
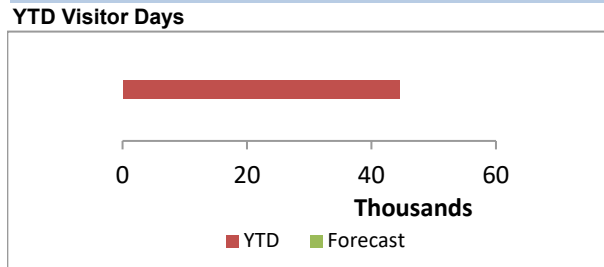
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures



Market Insights – March 2020

The HTA Monthly Market Insights reports on the most recent key performance indicators that the Hawai'i Tourism Authority (HTA) uses to measure success. The following measures provide indicators of the overall health of Hawai'i's visitor industry and help to gauge if the HTA is successfully attaining its goals.

Report on Economic Impact

In March 2020, both visitor spending and visitor arrivals were down more than 50 percent compared to a year ago because of the COVID-19 pandemic. Flight cancellations to Hawai'i started in February 2020, greatly affecting the China market. In March the majority of flights to Hawai'i were cancelled. On March 13, most cruise lines voluntarily suspended ship operations in U.S. waters. On March 17, Governor Ige asked upcoming visitors to postpone their trips for at least the next 30 days. The counties also began issuing stay-at-home orders. On March 26, Hawai'i started requiring all passengers arriving from out of state to follow a mandatory 14-day self-quarantine.

For the first quarter of 2020, Hawai'i's tourism economy experienced:

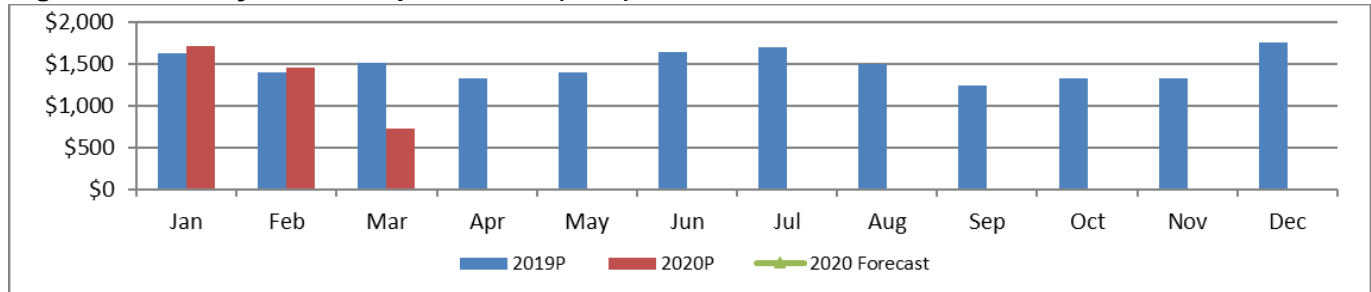
- Visitor spending dropped 14.1 percent compared to the first quarter of 2019 to \$3.89 billion, with decreases from U.S. West (-7.9% to \$1.51 billion), U.S. East (-6.7% to \$1.16 billion), Japan (-19.7% to \$415.7 million), Canada (-20.7% to \$361.5 million) and All Other International Markets (-34.8% to \$434.5 million) compared to a year ago.
- Total visitor arrivals in the first quarter declined 16.4 percent to 2,125,486 visitors due to fewer arrivals by air (-16.3% to 2,095,695) and cruise ships (-24.8% to 29,792) versus a year ago. Total visitor days dropped 15.1 percent.
- Hawai'i's tourism economy experienced \$454.3 million in generated state tax revenue, down 14.1 percent (-\$74.7 million) compared to the first quarter of 2019.
- Through February 2020, the state collected \$457.5 million in TAT, an increase of 14.2 percent compared to FY 2019 through February 2019.
- Total air capacity (scheduled and charter seats) into Hawai'i declined 2.5 percent to 3,252,800 seats.

Table 1: Overall Key Performance Indicators – Total (Air + Cruise) – YTD March 2020

	% of Forecast	YOY Rate	Mar. YTD	Forecast
Visitor Spending (\$mil)*	NA	-14.1%	3,891.9	NA
Daily Spend (\$pppd)	NA	1.1%	198.9	NA
Visitor Days	NA	-15.1%	19,564,106	NA
Arrivals	NA	-16.4%	2,125,486	NA
Daily Census	NA	-16.0%	214,990	NA
Airlift (scheduled seats)	NA	-2.9%	3,222,541	NA

DBEDT 2020 forecasts were not available at the time of report publication.

Figure 1: Monthly Visitor Expenditures (\$mil)



Major Market Areas (MMAs)

USA

Table 2: Key Performance Indicators - U.S. Total

	% of Forecast	YOY Rate	Mar. YTD	Forecast
Visitor Spending (\$mil)*	NA	-7.4%	2,667.6	NA
Daily Spend (\$pppd)	NA	3.2%	197.9	NA
Visitor Days	NA	-10.3%	13,478,807	NA
Arrivals	NA	-11.6%	1,423,192	NA
Daily Census	NA	-11.2%	148,119	NA
Airlift (scheduled seats)	NA	3.2%	2,353,271	NA

DBEDT 2020 forecasts were not available at the time of this report.

- Comerica Bank Economic Outlook expects Q2 real GDP in the U.S. to contract at the fastest rate recorded since World War II. It is also expected that the U.S. unemployment rate to peak late this year at a post-WWII record of near 15 percent.
- The Conference Board Consumer Confidence Index declined sharply in March, following an increase in February. The Index now stands at 120.0 (1985=100), down from 132.6 in February. The Expectations Index – based on consumers’ short-term outlook for income, business and labor market conditions – decreased from 108.1 last month to 88.2 this month.
- Prior to the COVID-19 outbreak, U.S. wholesale partners were reporting healthy advance bookings for spring break and summer travel seasons that continued through the first 13 days of March. Since that time, select wholesalers have shared they are working with existing customers to move travel later in the year and are offering very flexible rebooking and cancellation policies.
- Due to the COVID-19 virus, flights in and out of Hawai'i are in a state of flux and their frequency and operation are changing daily. Domestic seat forecast for 2020 is 8,257,062, a -15.3 percent decrease from 2019. These numbers are expected to be adjusted down even further as the airlines continue to optimize their schedules each week.
- All U.S. domestic carriers have extended grounding of the Boeing MAX through September 2020 at the earliest.

US WEST

Table 3: Key Performance Indicators - U.S. West

	% of Forecast	YOY Rate	Mar. YTD	Forecast
Visitor Spending (\$mil)*	NA	-7.9%	1,511.4	NA
Daily Spend (\$pppd)	NA	3.0%	184.9	NA
Visitor Days	NA	-10.6%	8,173,302	NA
Arrivals	NA	-11.8%	908,883	NA
Daily Census	NA	-11.5%	89,817	NA
Airlift (scheduled seats)	NA	2.1%	2,022,576	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- In March 2020, the U.S. West market reported a 45.2 percent drop in visitor spending to \$316.8 million. Arrivals were down 49.7 percent to 200,842 visitors. Daily visitors spending was higher (+1.5% to \$178 per person) compared to March 2019.

US EAST

Table 4: Key Performance Indicators - U.S. East

	% of Forecast	YOY Rate	Mar. YTD	Forecast
Visitor Spending (\$mil)*	NA	-6.7%	1,156.3	NA
Daily Spend (\$pppd)	NA	3.4%	217.9	NA
Visitor Days	NA	-9.8%	5,305,505	NA
Arrivals	NA	-11.1%	514,309	NA
Daily Census	NA	-10.8%	58,302	NA
Airlift (scheduled seats)	NA	10.7%	330,695	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- In March 2020, spending by U.S. East visitors declined 43.0 percent to \$230.5 million. Arrivals fell 45.9 percent to 120,146 visitors. Daily spending (-1.0% to \$201 per person) decreased compared to a year ago.

CANADA

Table 5: Key Performance Indicators – Canada

	% of Forecast	YOY Rate	Mar. YTD	Forecast
Visitor Spending (\$mil)*	NA	-20.7%	361.5	NA
Daily Spend (\$pppd)	NA	3.1%	176.1	NA
Visitor Days	NA	-23.0%	2,053,433	NA
Arrivals	NA	-25.7%	155,735	NA
Daily Census	NA	-23.9%	22,565	NA
Airlift (scheduled seats)	NA	-22.0%	164,881	NA

DBEDT 2020 forecasts were not available at the time of report publication

- Spending by Canadian visitors decreased 58.9 percent to \$56.5 million in March 2020. Arrivals dropped 65 percent to 26,426 visitors. Daily spending (+2.2% to \$161 per person) was higher compared to March 2019.
- The Canadian Dollar averaged USD \$0.76 cents through the first two months of 2020, a similar value as in 2019. In March, the volatility of oil prices and the COVID-19 financial crisis brought the value of the Canadian Dollar down to USD \$0.71.

- The Canadian economy is reeling as the impacts of the COVID-19 pandemic ravage consumer and business spending and cratering oil prices have put a halt to the expected rebound in the energy sector. 3.1 million Canadians have applied for government assistance as a result of lay-offs and reduced work hours.
- After increases in January and February, the consumer confidence index plummeted 32 points in March amidst COVID-19 concerns. This was the largest monthly decline recorded with every region seeing a double-digit decline in confidence.
- As of March 27, both Air Canada and WestJet have suspended air service to Hawai'i due to the COVID-19 situation.
- The Canadian border remains closed and only Canadians citizens and Canadian permanent residents are currently allowed into the country.
- The 737 MAX 8 landing has also significantly affected Canadian carriers. All Canadian carriers have extended grounding of the Boeing MAX through September 2020 at the earliest.

JAPAN

Table 6: Key Performance Indicators – Japan

	% of Forecast	YOY Rate	Mar. YTD	Forecast
Visitor Spending (\$mil)*	NA	-19.7%	415.7	NA
Daily Spend (\$pppd)	NA	1.5%	240.4	NA
Visitor Days	NA	-20.9%	1,729,323	NA
Arrivals	NA	-21.5%	294,228	NA
Daily Census	NA	-21.7%	19,004	NA
Airlift (scheduled seats)	NA	-8.0%	465,328	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- In March 2020, spending by Japanese visitors dropped 63 percent to \$67.5 million. Arrivals from Japan declined to 45,332 visitors (-66.1%), a third of what it was a year ago. Daily visitor spending increased to \$239 per person (+2.1%).
- The exchange rate was at 107.29 JPY to USD in March 2020, gaining value over the USD as the Japanese Government expanded its stimulus package to support companies impacted by COVID-19.
- The economic impact of the Coronavirus is speculated to surpass that of the SARS outbreak in 2003. The decline in inbound travelers to Japan is forecasted to result in loss of consumption up to 300 billion yen each month. Travel restrictions imposed by Japan on Chinese and Korean travelers are especially contributing to this loss as they accounted for close to 50 percent of the share in consumption by visitors.
- The Coronavirus outbreak continues to spread in Japan rapidly increasing to over 13,000 recorded cases. Major events and attractions continue to be canceled or closed in efforts mitigate the spread of the virus. Prime Minister Abe has officially declared a state of emergency for the nation on 4/16 to curb the effects of COVID-19 as the nation heads into the Golden Week holidays.
- The travel industry is taking significant hits as an increasing amount of travel restrictions are being imposed. All direct flights between Japan and Hawai'i are currently suspended, with

most airlines announcing that the suspension will extend throughout May. Major travel agencies are also canceling all of their international tour products until June.

- Instead of returning to full originally scheduled operations, airlines will be phasing in their return of service along with a change in their safety protocols. Travel agencies will also be focusing initially on recovery of domestic travel demands as the Japan Tourism Agency issued recovery funds for the travel industry focused on revitalizing domestic and inbound tourism.
- Latest studies on Japanese outbound travelers found that outbound travel declined by 85.9 percent to 272,700 year over year in March.
- All airlines have suspended flights as travel demand declines and travel restrictions are imposed. A list of currently announced flight changes for Hawai'i are as follows:
 - All Nippon Airways: suspension of all services through May
 - Delta Air Lines: suspension of all services through May
 - Hawaiian Airlines: suspension of all services excluding their second HND – HNL route, HND – KOA route and CTS – HNL route through May. Suspension of the second HND – HNL route and HND – KOA route through June. Suspension of the CTS – HNL route through 7/19.
 - Japan Airlines: suspension of all services through May
 - United Airlines: suspension of all services through 6/4
 - Korean Air: suspension of all services through May
 - Air Asia X: suspension of all services through May

OCEANIA

Table 7: Key Performance Indicators – Oceania

	% of Forecast	YOY Rate	Mar. YTD	Forecast
Visitor Spending (\$mil)*	NA	-16.2%	143.6	NA
Daily Spend (\$pppd)	NA	-3.9%	253.6	NA
Visitor Days	NA	-12.8%	566,239	NA
Arrivals	NA	-11.6%	60,749	NA
Daily Census	NA	-13.7%	6,222	NA
Airlift (scheduled seats)	NA	-17.4%	95,737	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- Australia: Visitor arrivals decreased in March (-36.4% to 10,516) and through the first quarter of 2020 (-12.8% to 50,067) versus a year ago.
- After nearly 30 years of economic growth, Australia's economy is on the brink of its deepest recession in 90 years, as restrictions designed to mitigate the spread of Covid-19 push businesses and households to the edge. Australia, along with many other parts of the world, has come to a virtual halt, closing its borders and restricting domestic travel. The entire country is now under lockdown barring essential services and some states have closed their borders.
- By the end of March, the Federal government delivered three rounds of stimulus packages for a total of AU\$213 billion in direct spending. Along with AU\$105 billion in lending from the

Reserve Bank of Australia, this brings total fiscal and monetary stimulus to 16.4 percent of GDP. The stimulus measures include an AU\$130 billion Job Keeper program, providing a wage subsidy for employers to pass on to employees to keep them in work. The program has been welcomed as a game-changer as, effectively for the next six months, the Federal Government will be paying the equivalent of half of the country's total wage bill to prevent over a million workers losing their jobs. As expected, the Australian dollar fluctuated considerably during the month. From a month low of US\$0.57, it was somewhat stable at US\$0.61 by the end of March.

- New Zealand: Visitor arrivals dropped in March (-21.0% to 2,927) and through the first quarter of 2020 (-5.1% to 10,682).
- New Zealand's decision to introduce a strict nationwide lockdown has been based on protecting the health of New Zealanders, but at the short-term expense of the economic health of the country. Most businesses are negatively affected, and the government has introduced a NZ\$9.3 billion package to help businesses get through the upcoming months. The initial decision caused a marked drop in the NZ\$ value which traded as low as US\$0.56 during the month. However, the positive trends on COVID-19 cases brought a returned strength in the NZ\$ to be over US\$0.60.

EUROPE

Table 8: Key Performance Indicators – Europe

	% of Forecast	YOY Rate	Mar. YTD	Forecast
Visitor Spending (\$mil)*	NA	-24.6%	38.4	NA
Daily Spend (\$pppd)	NA	-6.6%	143.0	NA
Visitor Days	NA	-19.2%	268,300	NA
Arrivals	NA	-16.9%	20,395	NA
Daily Census	NA	-20.1%	2,948	NA
Airlift (scheduled seats)	NA	N/A	N/A	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- Visitor arrivals from the United Kingdom, France, Germany, Italy and Switzerland decreased in March (-53.5% to 3,808) and through the first quarter of 2020 (-16.9% to 20,395).
- The UK government announced in March a package to help the economy through the coronavirus outbreak, suspending business rates for many firms in England. This has been supplemented by an unprecedented decision by the UK government to cover 80 percent of the salary of UK workers if their companies keep them on their payroll and 'furlough' them as opposed to making them redundant. The Bank of England has also announced an emergency cut in interest rates.
- Coronavirus is having an enormous impact on consumer sentiment in Germany. Both economic and income expectations, as well as propensity to buy are expected to suffer heavy losses. As a result, GfK has forecasted a figure of 2.7 points for April 2020, 5.6 points lower than March's level (revised to 8.3 points). These are the results of the GfK German consumer climate study for March 2020.
- Due to the COVID-19 situation, a European travel ban was put into effect as of March 13, 2020, to last until terminated by the President, which did not initially include the United Kingdom and Ireland. Effective March 16, the United Kingdom and Ireland were added to the European travel ban.

- As borders have closed globally and the FCO has advised against all but essential travel anywhere in the world, the UK travel industry (alongside the UK government in some cases) has been working to repatriate all travelers still abroad back to the UK. The focus for sales agents has been on this repatriation program as well as amending bookings due to take place this year. In general, agents report that the majority customers are amending to later dates, as opposed to cancelling.

CHINA

Table 9: Key Performance Indicators – China

	% of Forecast	YOY Rate	Mar. YTD	Forecast
Visitor Spending (\$mil)*	NA	N/A	N/A	NA
Daily Spend (\$pppd)	NA	N/A	N/A	NA
Visitor Days	NA	-65.1%	87,921	NA
Arrivals	NA	-66.1%	9,952	NA
Daily Census	NA	-65.5%	966	NA
Airlift (scheduled seats)	NA	-76.0%	8,176	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- With the suspension of direct flights to Hawai'i since February 3, there were very few visitors from China in March (-97.0% to 205) compared to a year ago. Through the first quarter of 2020, visitor arrivals decreased (-66.1% to 9,952) year-over-year.
- China's economy shrank by 6.8 percent in the first quarter of 2020, the first contraction since the end of the Cultural Revolution in 1976, confirming the economic damage done by the coronavirus pandemic. China still remains the world's second-largest economy and the latest forecast is growth of 1.2 percent this year.
- In Q1 2020, China domestic retail sales, a key measurement of consumption in the world's most populous nation, fell by 15.8 percent, following a record 20.5 percent collapse in the first two months, much worse than forecasts of a 10.0 percent slump.
- COVID-19 Update: Epidemic covers total 337 cities in Greater China. There were 46 new cases on April 15, 2020 and most new cases are from overseas.
- From March 29, 2020, Chinese airlines are allowed to fly just one weekly route to one city per country, operating it at no more than 75 per cent capacity per the Civil Aviation Administration of China (CAAC). Airlines will be allowed to use their capacity to carry cargo in and out of China. Beijing also imposes ban on most foreign travelers entering the country.
- A new "worry-free" economy is emerging from China as one of the countries opening up for business. Through unmanned delivery, enhanced online services, and friendlier offline touchpoints, "worry-free" has become the dominant narrative to come out of this crisis. Businesses looking to survive in a post-COVID19 world will need to adapt and learn from China as an innovator in this area.
- Hawai'i Tourism China recently conducted five B2B online webinars in March/April to educate key China travel agencies, OTAs, UGC platforms, etc. The webinars attracted over 1,400 participants.

KOREA

Table 10: Key Performance Indicators – Korea

	% of Forecast	YOY Rate	Mar. YTD	Forecast
Visitor Spending (\$mil)*	NA	-32.7%	89.8	NA
Daily Spend (\$pppd)	NA	-1.1%	259.5	NA
Visitor Days	NA	-32.0%	346,142	NA
Arrivals	NA	-34.1%	41,614	NA
Daily Census	NA	-32.8%	3,804	NA
Airlift (scheduled seats)	NA	-19.6%	70,957	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- Visitor arrivals dropped considerably in March (-82.0% to 2,399) and year-to-date (-34.1% to 41,614).
- The International Monetary Fund (IMF) has predicted that South Korea's economy will shrink 1.2 percent this year as the global economy is expected to hit its worst year since the Great Depression of the 1930s. The Korean economy contracted 1.4 percent in the first quarter of 2020, as the COVID-19 pandemic resulted in a huge drop in domestic consumption and exports according to Bank of Korea (BOK).
- The South Korean Government has decided to push for a Korean version of the "New Deal" program to protect the country's major industries from any COVID-19 shock and maintain employment levels. The decision reflects the dire reality that the local economy is taking the brunt of the pandemic crisis. The government will draft an additional economic relief package worth 89.4 trillion won (\$72.5 billion) which are committed to help hard-hit businesses, particularly small and medium firms, as well as stabilize financial markets and boost the people's livelihoods.
- The average USD/WON exchange rate in March was 1216.85 won, a slight increase from the previous rate of 1192.17 won in February
- According to Korea Tourism Organization (KTO), the number of outbound trips nosedived by 93.9 percent year-over-year to 143,366 passenger in March. Korean visitor arrival to the U.S. plunged 87.5 percent to 10,570 passenger during March 2020. In terms of inbound travel market, KTO also reported that a total of 83,497 foreigners visited South Korea in March, down by 94.6 percent year-on-year.
- Korean Air will suspend its flight services of ICN-HNL route (KE053) and ICN-NRT-HNL route (KE001) till May 31, 2020.
- Asiana Airlines will suspend its flight service of ICN-HNL route (OZ232) until May 31, 2020.
- Hawaiian Airlines halted its flight service of ICN-HNL routes from March 2 through June 1, 2020

TAIWAN

Table 11: Key Performance Indicators – Taiwan

	% of Forecast	YOY Rate	Mar. YTD	Forecast
Visitor Spending (\$mil)*	NA	N/A	N/A	NA
Daily Spend (\$pppd)	NA	N/A	N/A	NA
Visitor Days	NA	-33.1%	33,187	NA
Arrivals	NA	-30.3%	3,449	NA
Daily Census	NA	-33.8%	365	NA
Airlift (scheduled seats)	NA	-7.7%	7,344	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- Visitor arrivals declined significantly in March (-69.9% to 424) and through the first quarter of 2020 (-30.3% to 3,449).
- Taiwan has seen a slow-down in COVID-19 development. However, the Taiwan Central Epidemic Command Center advises to continue the efforts in preventing transmission by wearing a mask, washing hands, using alcohol spray and keeping social distance of 1.5 meters indoors and 1 meter outdoor.
- Taiwan's National Health Command Center deploys progressive protocols in containing COVID-19. Infrared thermometers are set-up in subway stations and buildings to measure body temperatures. Passengers are requested to wear a mask before boarding mass transportations and taxis.
- The suspension of all inbound and outbound group inclusive tours imposed on Taiwanese travel agencies will be further extended until the end of May in an effort to contain the spread of COVID-19 coronavirus.
- Affected by COVID-19 pandemic, China Airlines suspended its Taipei – Honolulu direct flights between March 25 to May 31. Total cancellation is 29 flights or 8,874 seats.

LATIN AMERICA

Table 122: Key Performance Indicators – Latin America

	% of Forecast	YOY Rate	Mar. YTD	Forecast
Visitor Spending (\$mil)*	NA	-15.8%	12.5	NA
Daily Spend (\$pppd)	NA	2.9%	234.4	NA
Visitor Days	NA	-18.2%	53,153	NA
Arrivals	NA	-13.6%	5,057	NA
Daily Census	NA	-19.1%	584	NA
Airlift (scheduled seats)	NA	N/A	N/A	NA

DBEDT 2020 forecasts were not available at the time of report publication.

- Visitor arrivals from Mexico, Brazil and Argentina declined in March (-49.2% to 800) and year-to-date (-13.6% to 5,057).

ISLAND VISITATION:

- **O'ahu** : In March, visitor spending decreased 56.7 percent to \$299.3 million. Total visitor days dropped 50.4 percent and average daily spending was lower (-12.6% to \$171 per person). Visitor arrivals to O'ahu declined considerably (-55.2% to 238,305). The average daily census was down 50.4 percent to 56,417 visitors in March.

Through the first quarter, visitor spending (-21.2% to \$1.59 billion) and arrivals (-17.4% to 1,223,012) decreased compared to a year ago.

- **Maui**: In March, visitor spending dropped 49.7 percent to \$221.6 million. Total visitor days decreased (-51.1%), but average daily spending was up (+2.9% to \$209 per person) compared to a year ago. Visitor arrivals declined 54.5 percent to 125,943 visitors. The average daily census decreased 51.1 percent to 34,164 visitors in March.

Through the first quarter, visitor spending (-10.2% to \$1.19 billion) and visitor arrivals (-17.6% to 603,188) were down compared to a year ago.

- **Hawai'i Island**: In March, visitor spending decreased 44.3 percent to \$113.4 million as a result of declines in visitor days (-43.8%) and average daily spending (-0.9% to \$170 per person). Arrivals dropped 53.6 percent to 78,389 visitors. The average daily census decreased 43.8 percent to 21,519 visitors in March.

Through the first quarter, visitor spending (-4.0% to \$625.0 million) and visitor arrivals (-14.6% to 390,138) declined versus a year ago.

- **Kaua'i**: In March, visitor spending decreased 48.2 percent to \$78.9 million. Visitor days declined 50.9 percent but average daily spending (+5.5% to \$179 per person) was higher compared to a year ago. Visitor arrivals were down by half (-54.2% to 56,865) compared to a year ago. The average daily census showed 14,249 visitors in March (-50.9%).

Through the first quarter, visitor spending (-8.3% to \$441.5 million) and visitor arrivals (-15.9% to 281,681) declined compared to the same period a year ago.

HTA Key Performance Indicators Dashboard

airlift (scheduled seats)

Hawai'i Tourism Authority Report Date: **Mar-20** Preliminary

Visitor Industry Performance Measures

Market: **OVERALL**

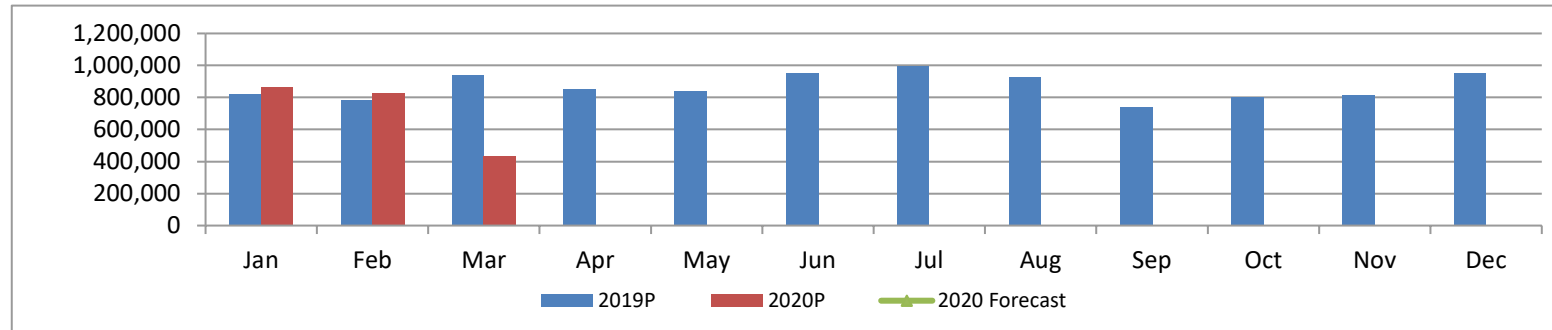
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-14.1%	3,891.9	N/A	O'ahu	-17.4%	1,223,012
Daily Spend (\$pppd)	N/A	1.1%	198.9	N/A	Maui	-17.6%	603,188
Visitor Days	N/A	-15.1%	19,564,106	N/A	Moloka'i	-10.5%	14,290
Arrivals	N/A	-16.4%	2,125,486	N/A	Lāna'i	-36.3%	14,872
Daily Census	N/A	-16.0%	214,990	N/A	Kaua'i	-15.9%	281,681
Airlift (scheduled seats)	N/A	-2.9%	3,222,541	N/A	Hawai'i Island	-14.6%	390,138

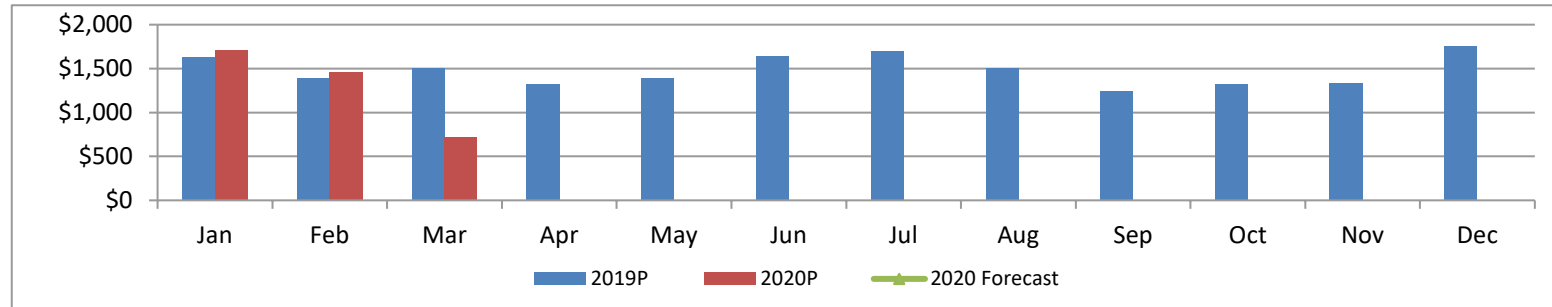
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

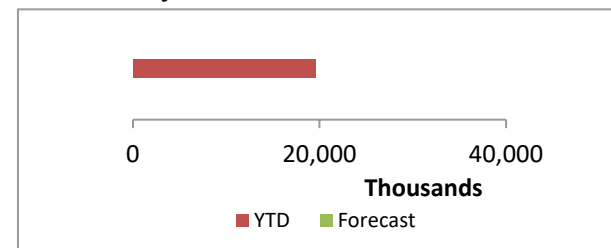


Monthly Visitor Expenditures (\$mil)

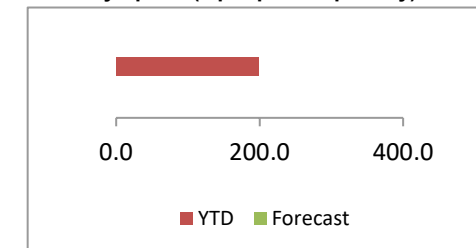


Annual Indicators

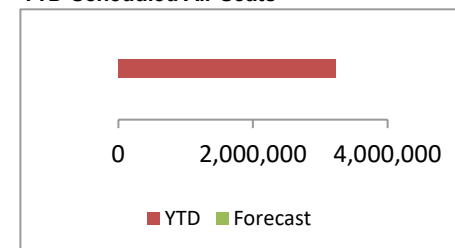
YTD Visitor Days



YTD Daily Spend (\$ per person per day)



YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

irlift (scheduled seats)

Hawai'i Tourism Authority Report Date: **Mar-20** Preliminary

Visitor Industry Performance Measures

Market: **U.S. TOTAL**

Key Performance Indicators

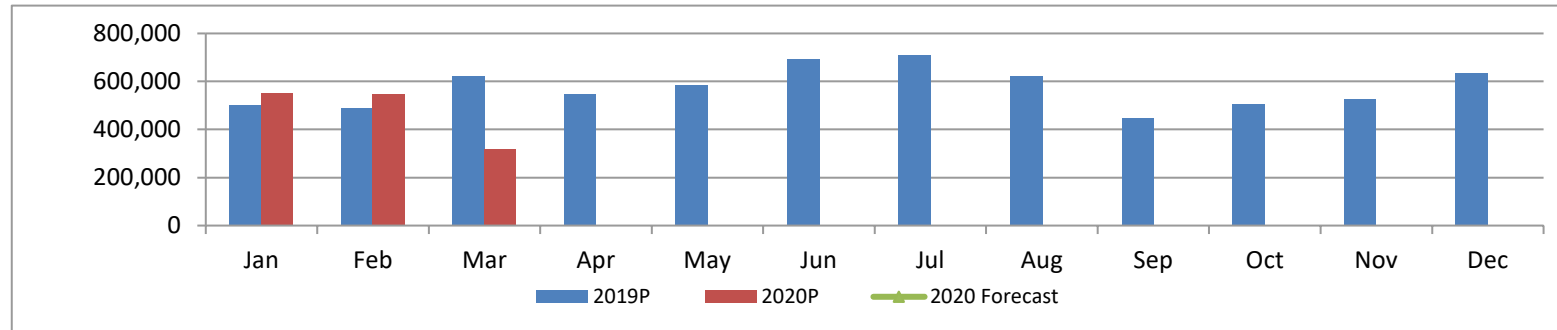
	% of Forecast*	YOY Rate	YTD	Forecast
Visitor Spending (\$mil)*	N/A	-7.4%	2,667.6	N/A
Daily Spend (\$pppd)	N/A	3.2%	197.9	N/A
Visitor Days	N/A	-10.3%	13,478,807	N/A
Arrivals	N/A	-11.6%	1,423,192	N/A
Daily Census	N/A	-11.2%	148,119	N/A
Airlift (scheduled seats)	N/A	3.2%	2,353,271	N/A

	YOY Rate	YTD
O'ahu	-10.2%	691,519
Maui	-12.1%	478,014
Moloka'i	-15.9%	9,651
Lāna'i	-16.7%	11,529
Kaua'i	-12.6%	233,054
Hawai'i Island	-9.5%	280,631

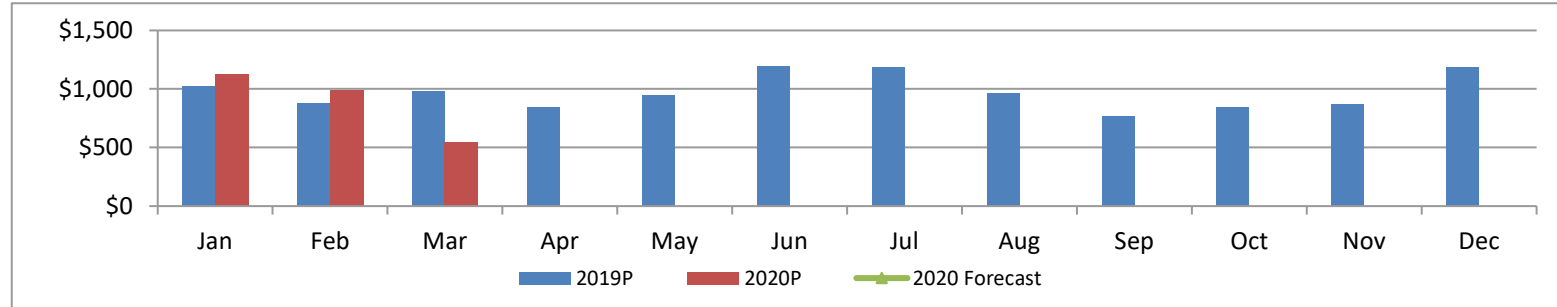
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

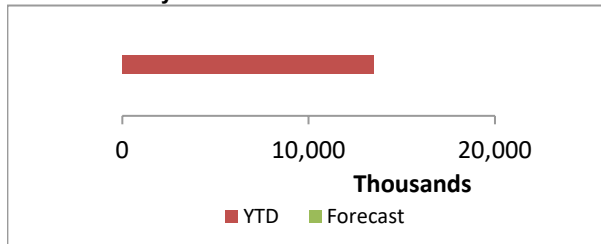


Monthly Visitor Expenditures (\$mil)

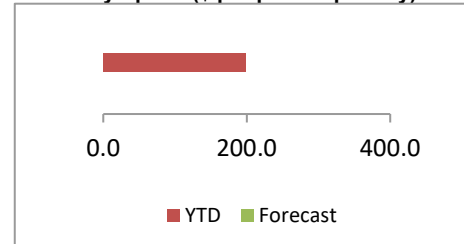


Annual Indicators

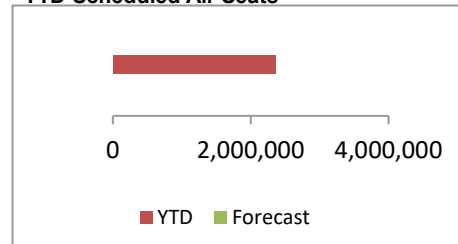
YTD Visitor Days



YTD Daily Spend (\$ per person per day)



YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

irlift (scheduled seats)

Hawai'i Tourism Authority Report Date: **Mar-20** Preliminary

Visitor Industry Performance Measures

Market: **U.S. WEST**

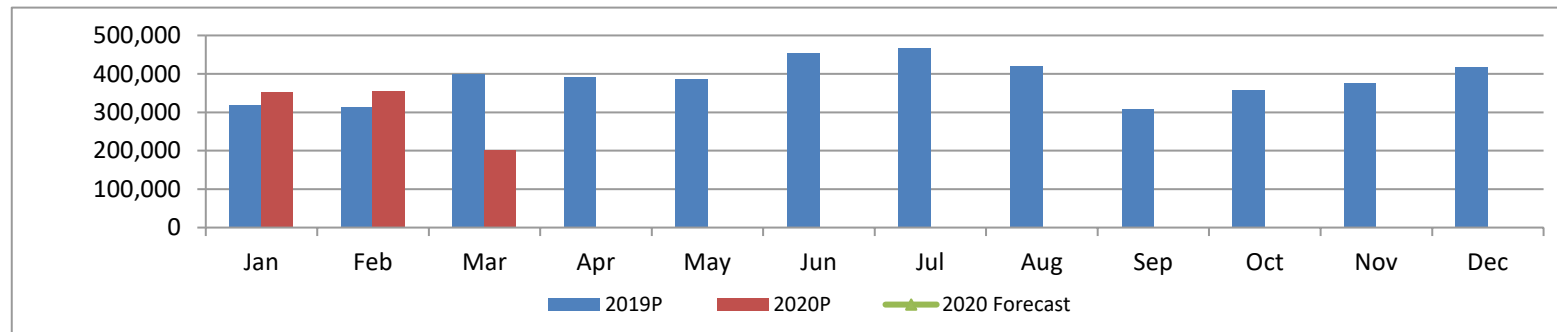
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-7.9%	1,511.4	N/A	O'ahu	-10.3%	403,584
Daily Spend (\$pppd)	N/A	3.0%	184.9	N/A	Mau	-12.7%	294,841
Visitor Days	N/A	-10.6%	8,173,302	N/A	Moloka'i	-19.4%	5,719
Arrivals	N/A	-11.8%	908,883	N/A	Lāna'i	-16.6%	6,119
Daily Census	N/A	-11.5%	89,817	N/A	Kaua'i	-12.0%	142,420
Airlift (scheduled seats)	N/A	2.1%	2,022,576	N/A	Hawai'i Island	-10.4%	173,222

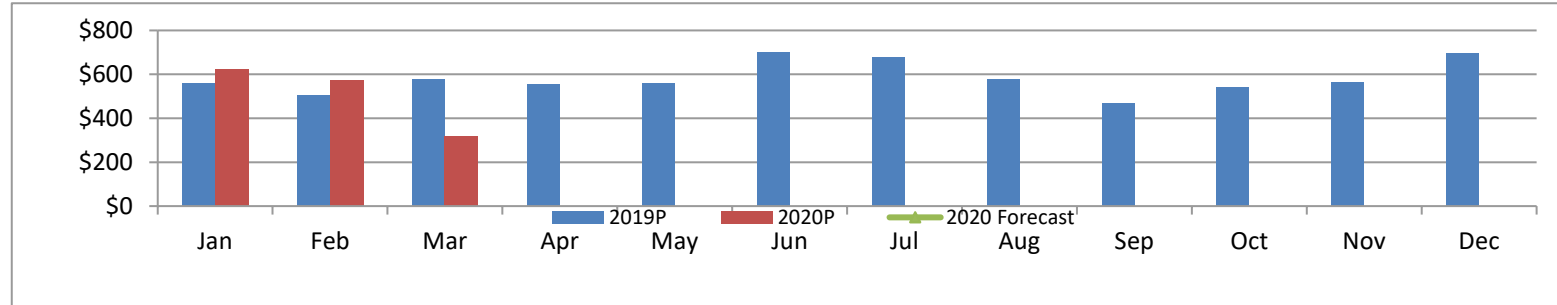
*DBEDT 2020 Forecast not yet available

Monthly Indicators

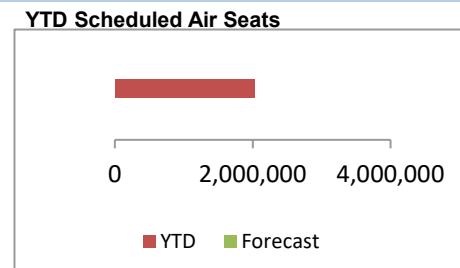
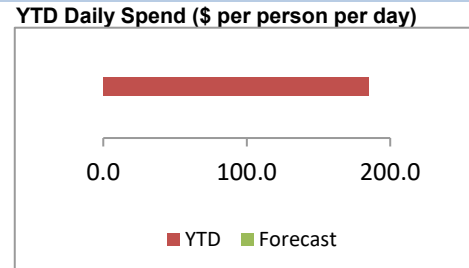
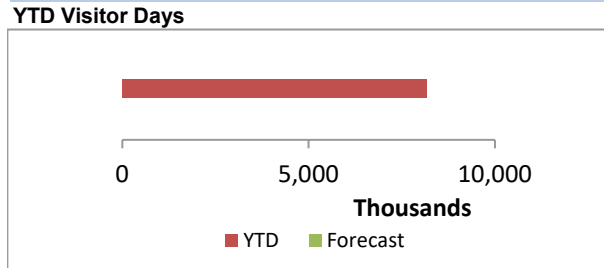
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

airlift (scheduled seats)

Hawai'i Tourism Authority Report Date: **Mar-20** Preliminary

Visitor Industry Performance Measures

Market: **U.S. EAST**

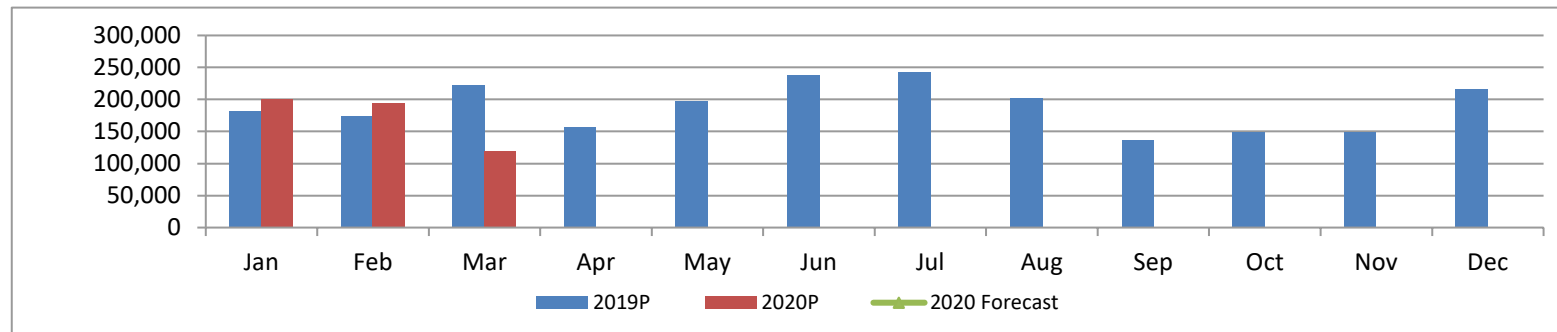
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-6.7%	1,156.3	N/A	O'ahu	-10.1%	287,934
Daily Spend (\$pppd)	N/A	3.4%	217.9	N/A	Mau	-11.2%	183,173
Visitor Days	N/A	-9.8%	5,305,505	N/A	Moloka'i	-10.1%	3,932
Arrivals	N/A	-11.1%	514,309	N/A	Lāna'i	-16.8%	5,409
Daily Census	N/A	-10.8%	58,302	N/A	Kaua'i	-13.6%	90,634
Airlift (scheduled seats)	N/A	10.7%	330,695	N/A	Hawai'i Island	-7.9%	107,409

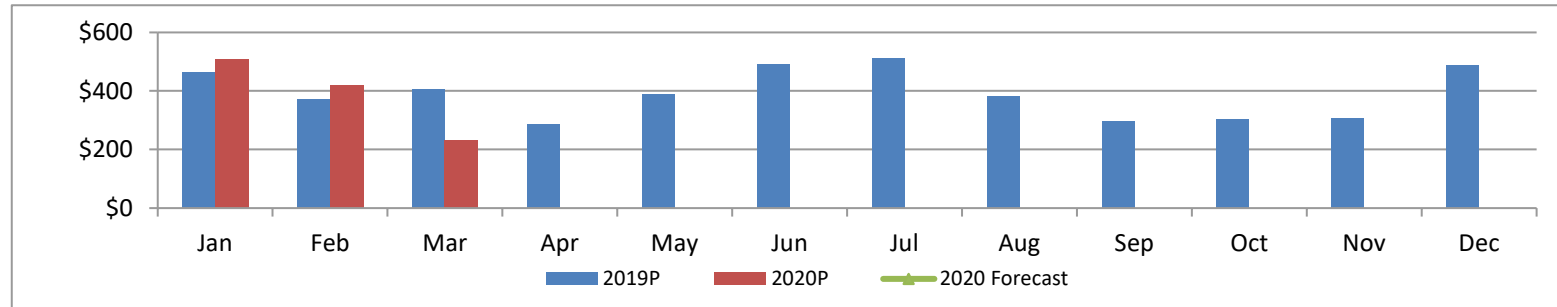
*DBEDT 2020 Forecast not yet available

Monthly Indicators

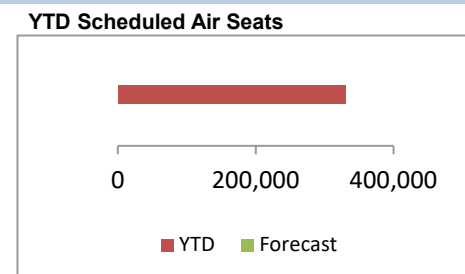
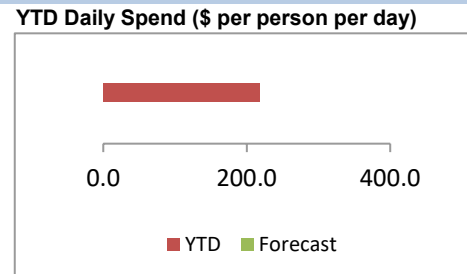
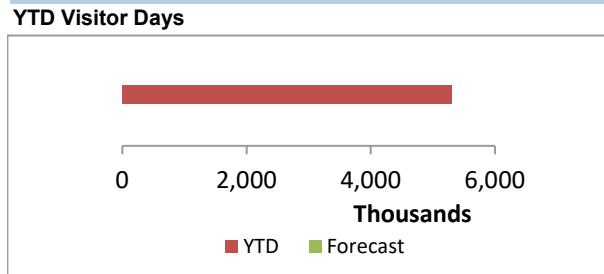
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

irlift (scheduled seats)

Hawai'i Tourism Authority Report Date: **Mar-20** Preliminary

Visitor Industry Performance Measures

Market: **CANADA**

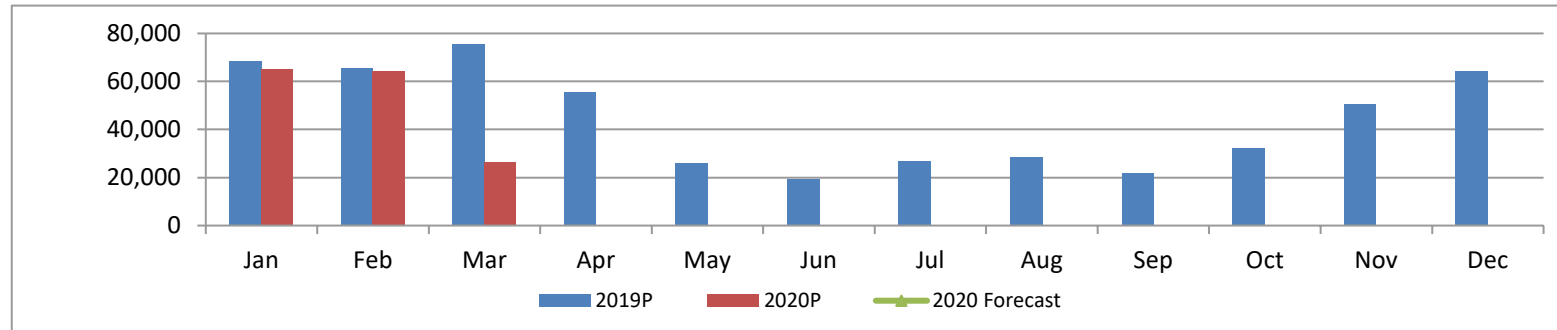
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-20.7%	361.5	N/A	O'ahu	-23.2%	61,634
Daily Spend (\$pppd)	N/A	3.1%	176.1	N/A	Mau	-31.1%	71,078
Visitor Days	N/A	-23.0%	2,053,433	N/A	Moloka'i	-44.9%	1,023
Arrivals	N/A	-25.7%	155,735	N/A	Lāna'i	-33.9%	1,556
Daily Census	N/A	-23.9%	22,565	N/A	Kaua'i	-28.3%	22,561
Airlift (scheduled seats)	N/A	-22.0%	164,881	N/A	Hawai'i Island	-10.9%	35,797

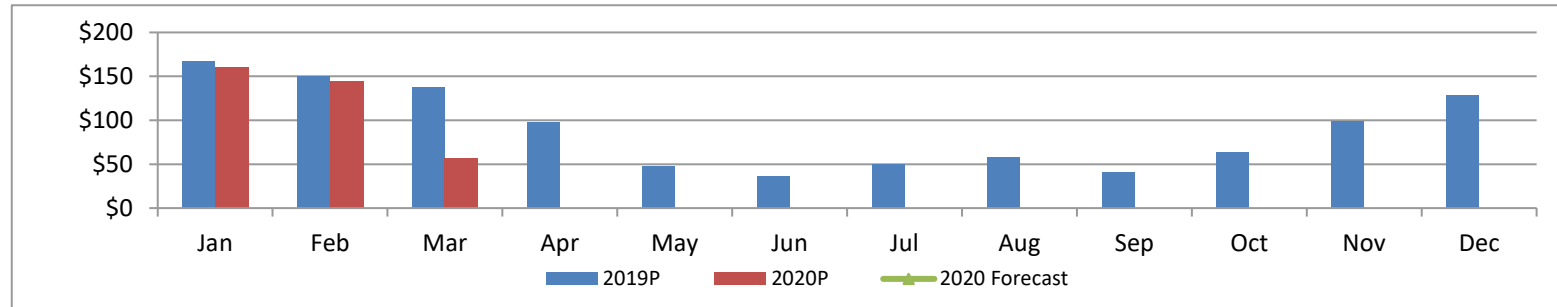
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

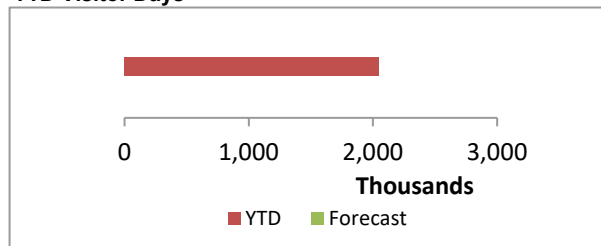


Monthly Visitor Expenditures (\$mil)

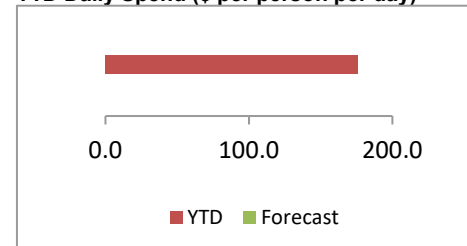


Annual Indicators

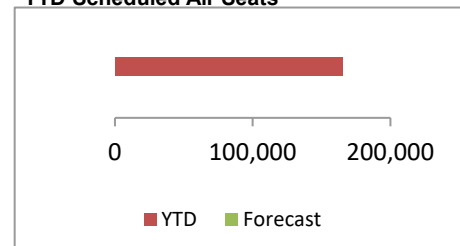
YTD Visitor Days



YTD Daily Spend (\$ per person per day)



YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

irlift (scheduled seats)

Hawai'i Tourism Authority Report Date: **Mar-20** Preliminary

Visitor Industry Performance Measures

Market: **JAPAN**

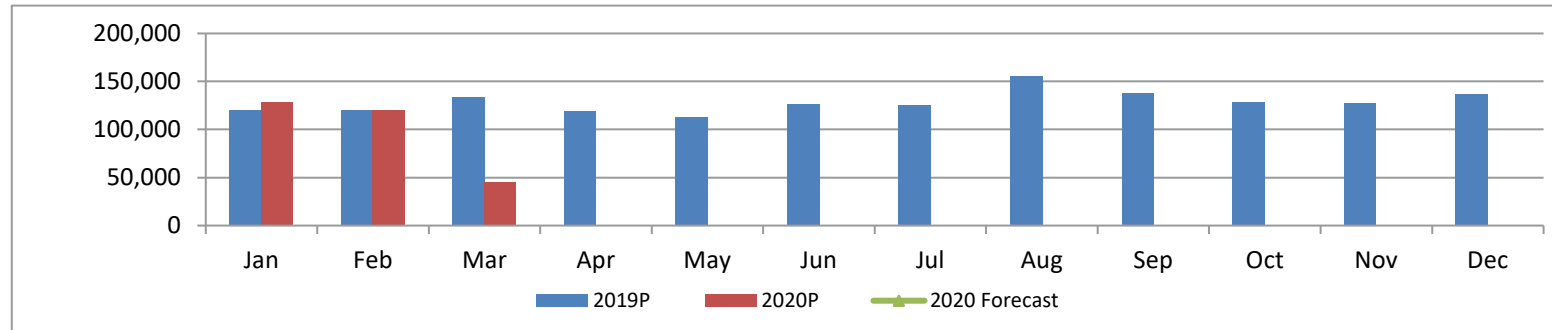
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-19.7%	415.7	N/A	O'ahu	-22.8%	274,520
Daily Spend (\$pppd)	N/A	1.5%	240.4	N/A	Mau	-38.1%	8,132
Visitor Days	N/A	-20.9%	1,729,323	N/A	Moloka'i	96.7%	421
Arrivals	N/A	-21.5%	294,228	N/A	Lāna'i	-75.4%	133
Daily Census	N/A	-21.7%	19,004	N/A	Kaua'i	-45.7%	3,699
Airlift (scheduled seats)	N/A	-8.0%	465,328	N/A	Hawai'i Island	-0.5%	35,893

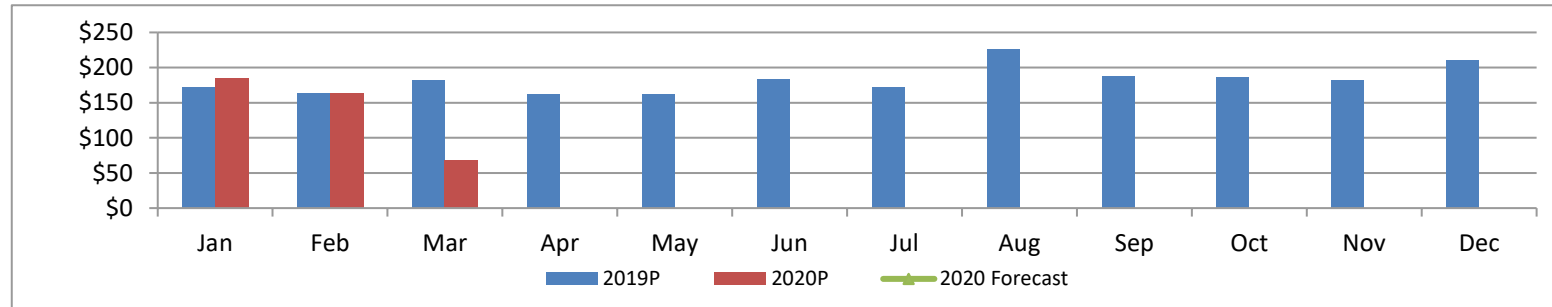
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

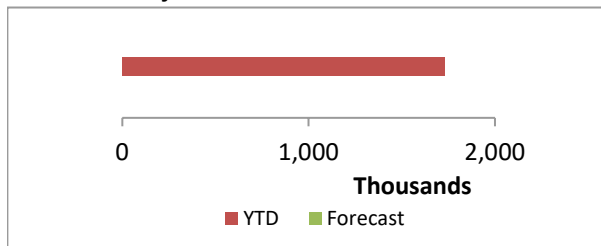


Monthly Visitor Expenditures (\$mil)

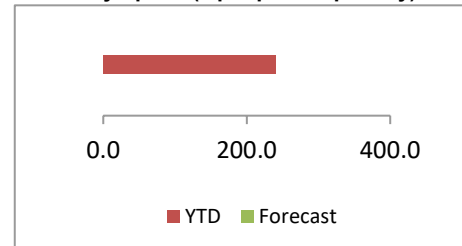


Annual Indicators

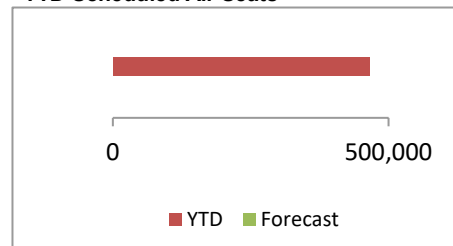
YTD Visitor Days



YTD Daily Spend (\$ per person per day)



YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

airlift (scheduled seats)

Hawai'i Tourism Authority Report Date: **Mar-20** Preliminary

Visitor Industry Performance Measures

Market: **CHINA**

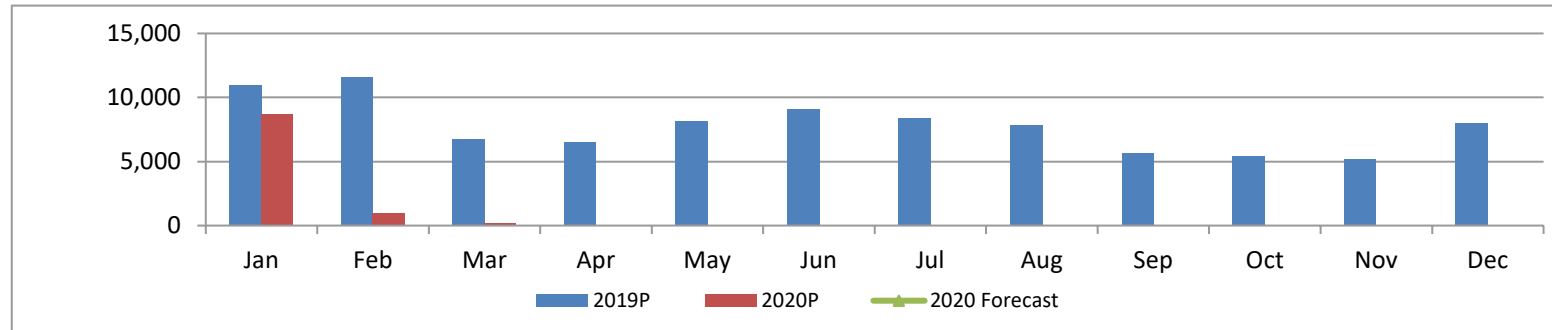
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A	O'ahu	-66.4%	9,513
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A	Maui	-66.8%	2,386
Visitor Days	N/A	-65.1%	87,921	N/A	Moloka'i	-62.6%	75
Arrivals	N/A	-66.1%	9,952	N/A	Lāna'i	-86.6%	56
Daily Census	N/A	-65.5%	966	N/A	Kaua'i	-54.7%	605
Airlift (scheduled seats)	N/A	-76.0%	8,176	N/A	Hawai'i Island	-67.0%	3,898

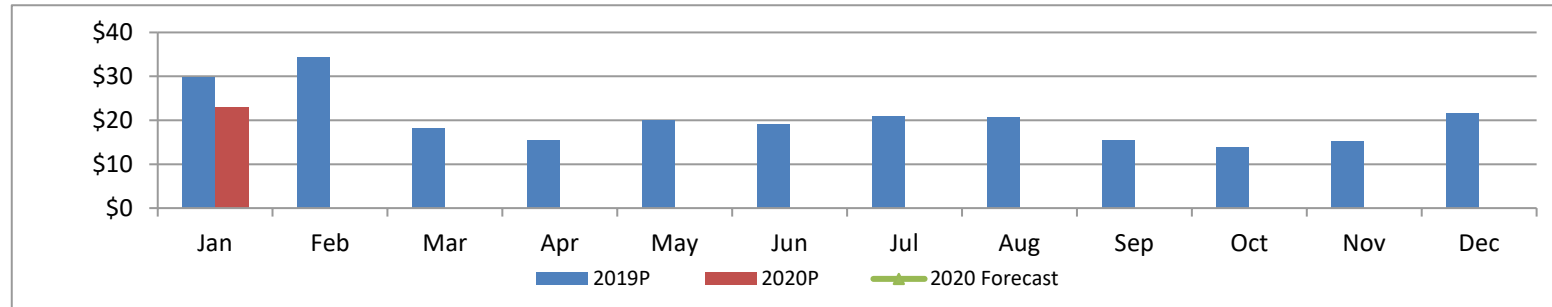
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

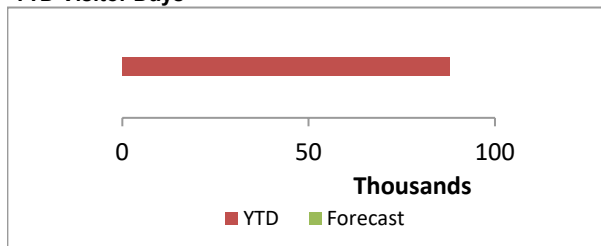


Monthly Visitor Expenditures (\$mil)

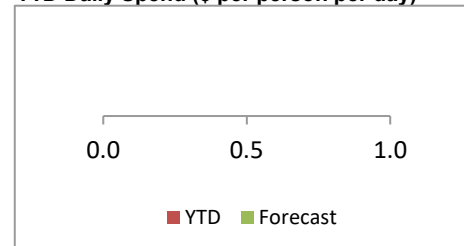


Annual Indicators

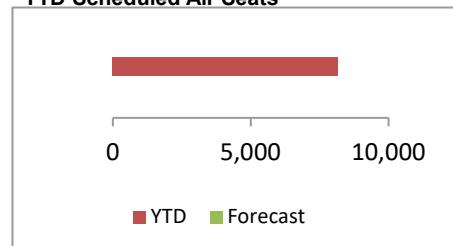
YTD Visitor Days



YTD Daily Spend (\$ per person per day)



YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

airlift (scheduled seats)

Hawai'i Tourism Authority Report Date: **Mar-20** Preliminary

Visitor Industry Performance Measures

Market: **KOREA**

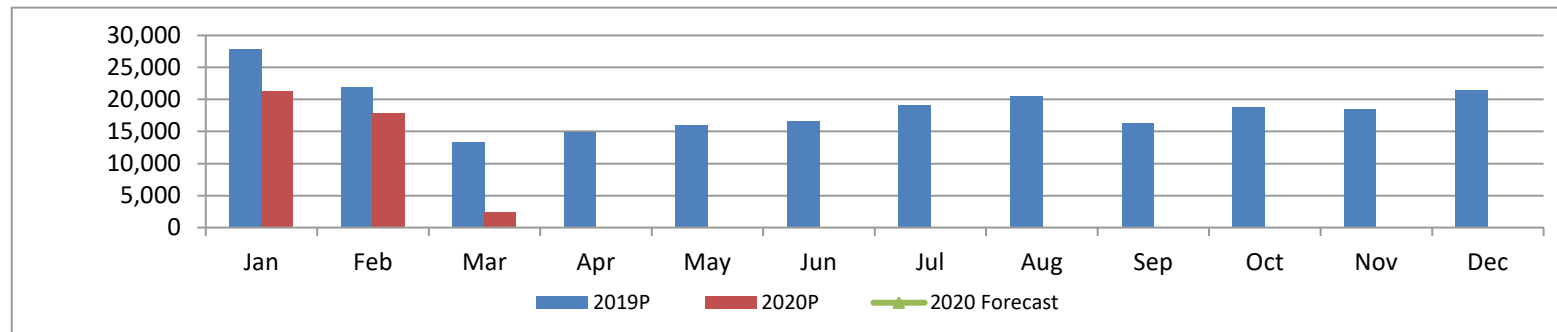
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-32.7%	89.8	N/A	O'ahu	-33.9%	41,037
Daily Spend (\$pppd)	N/A	-1.1%	259.5	N/A	Maui	-52.4%	4,165
Visitor Days	N/A	-32.0%	346,142	N/A	Moloka'i	-79.8%	60
Arrivals	N/A	-34.1%	41,614	N/A	Lāna'i	-66.4%	94
Daily Census	N/A	-32.8%	3,804	N/A	Kaua'i	-56.0%	1,205
Airlift (scheduled seats)	N/A	-19.6%	70,957	N/A	Hawai'i Island	-35.8%	6,092

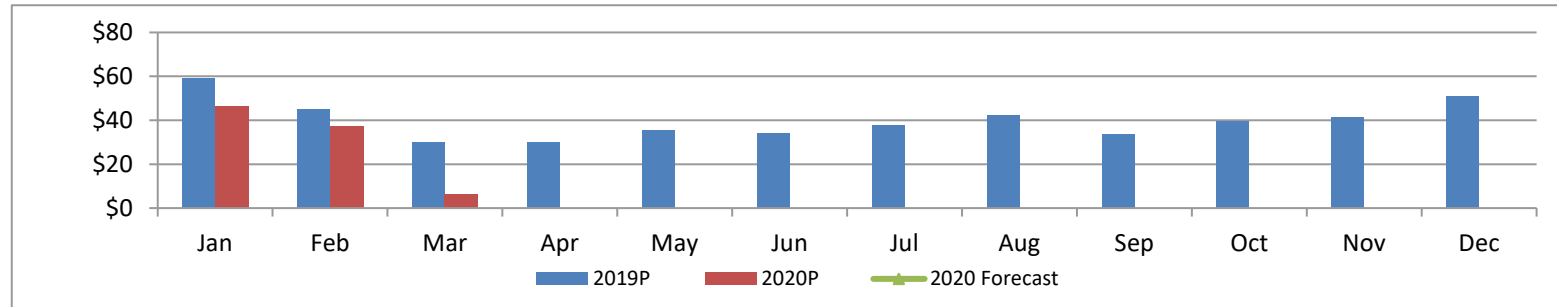
*DBEDT 2020 Forecast not yet available

Monthly Indicators

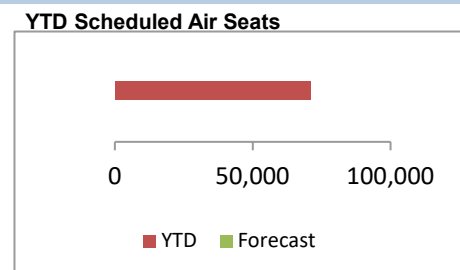
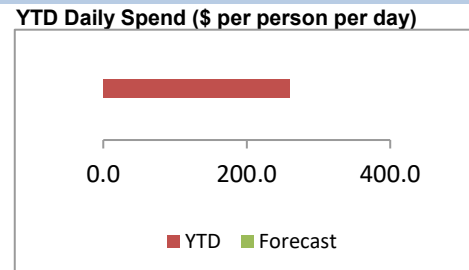
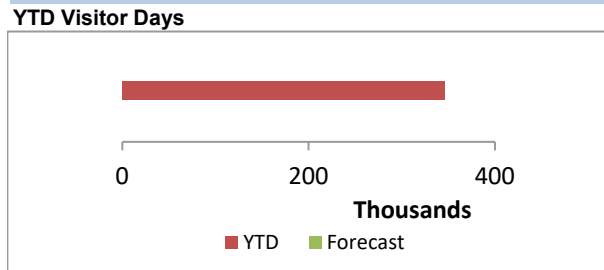
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

irlift (scheduled seats)

Hawai'i Tourism Authority Report Date: **Mar-20** Preliminary

Visitor Industry Performance Measures

Market: **TAIWAN**

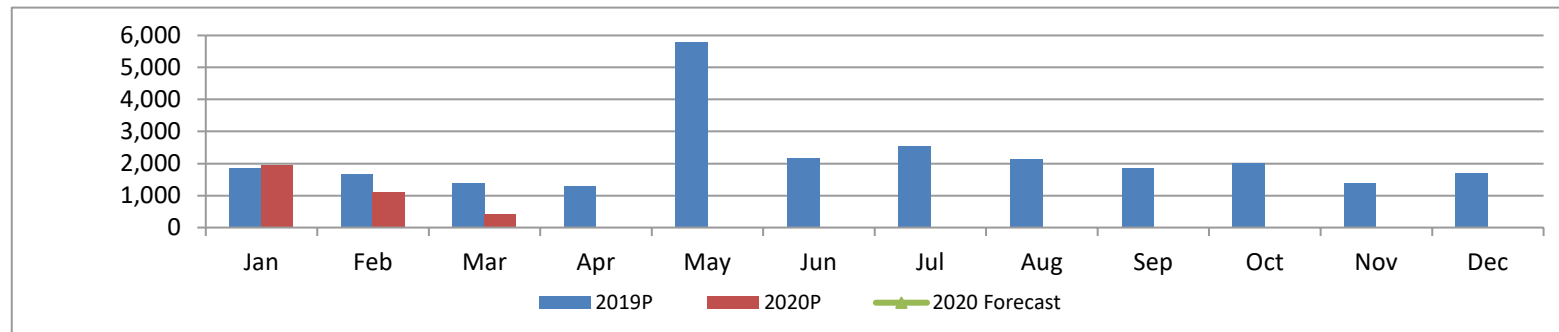
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A	O'ahu	-30.3%	3,362
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A	Mau	-45.5%	601
Visitor Days	N/A	-33.1%	33,187	N/A	Moloka'i	N/A	22
Arrivals	N/A	-30.3%	3,449	N/A	Lāna'i	-92.1%	3
Daily Census	N/A	-33.8%	365	N/A	Kaua'i	-71.8%	132
Airlift (scheduled seats)	N/A	-7.7%	7,344	N/A	Hawai'i Island	0.2%	1,238

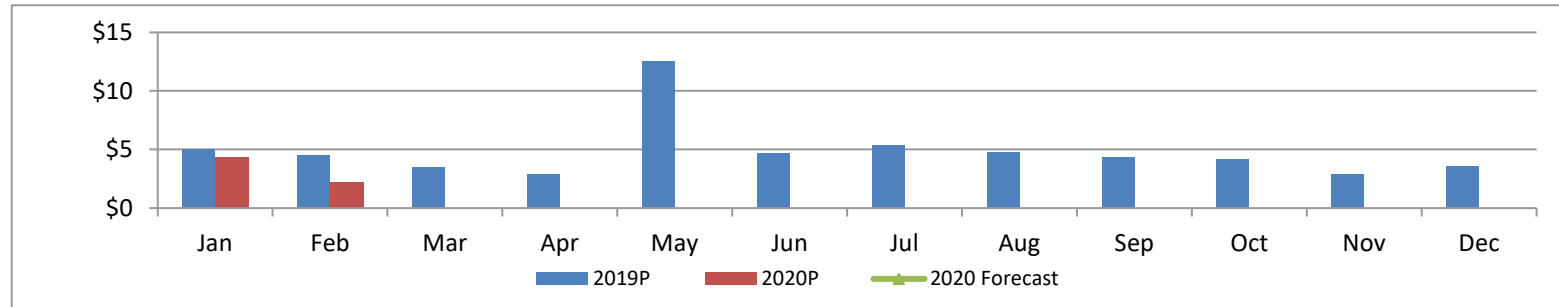
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Monthly Indicators

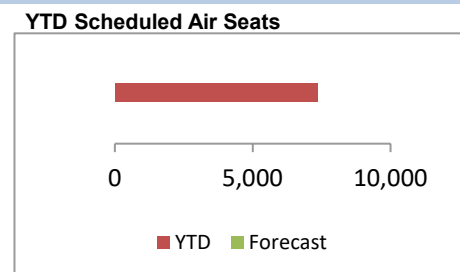
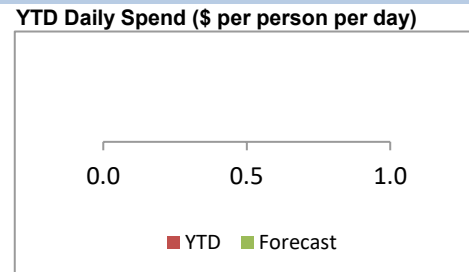
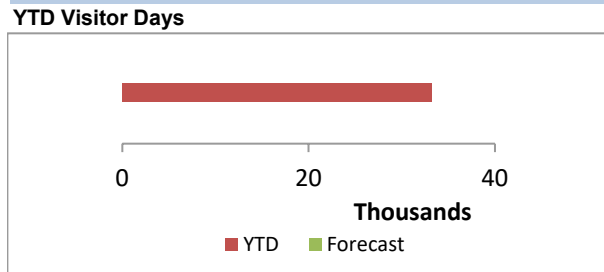
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

irlift (scheduled seats)

Hawai'i Tourism Authority Report Date: **Mar-20** *Preliminary*

Visitor Industry Performance Measures

Market: **OCEANIA**

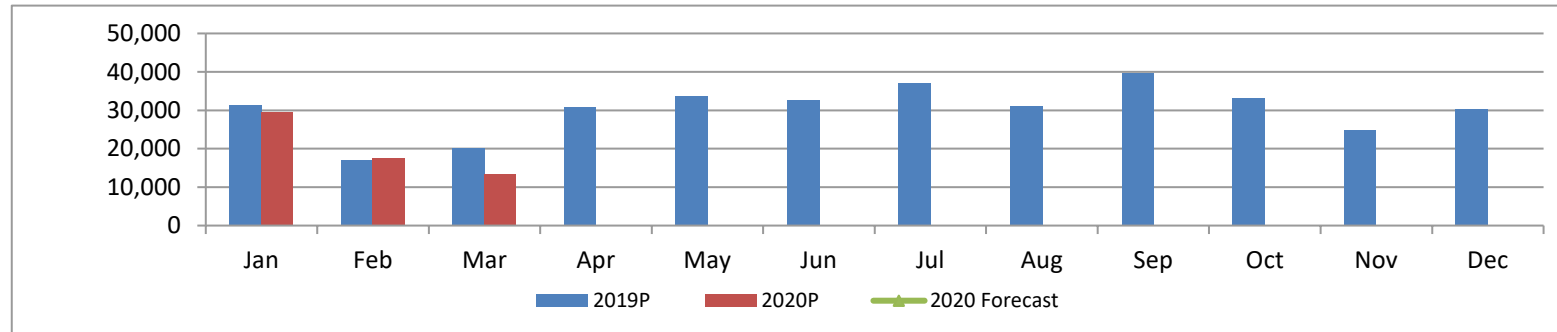
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-16.2%	143.6	N/A	O'ahu	-11.0%	59,484
Daily Spend (\$pppd)	N/A	-3.9%	253.6	N/A	Maui	-23.2%	8,628
Visitor Days	N/A	-12.8%	566,239	N/A	Moloka'i	5.0%	830
Arrivals	N/A	-11.6%	60,749	N/A	Lāna'i	-26.6%	845
Daily Census	N/A	-13.7%	6,222	N/A	Kaua'i	-20.9%	5,041
Airlift (scheduled seats)	N/A	-17.4%	95,737	N/A	Hawai'i Island	3.5%	7,608

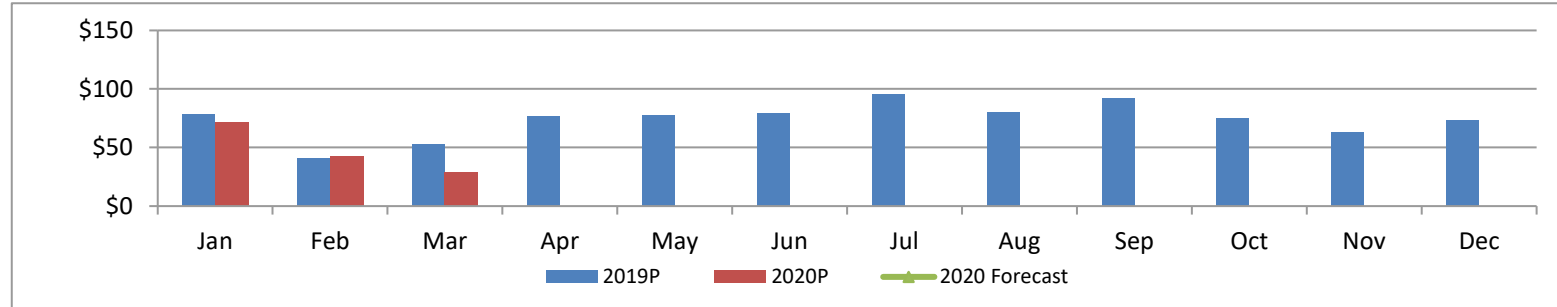
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

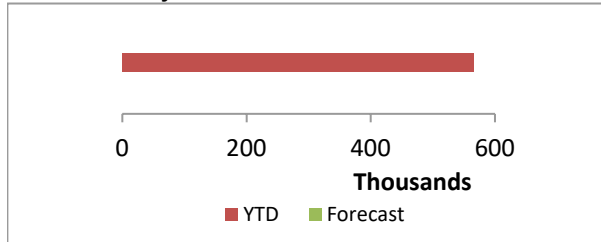


Monthly Visitor Expenditures (\$mil)

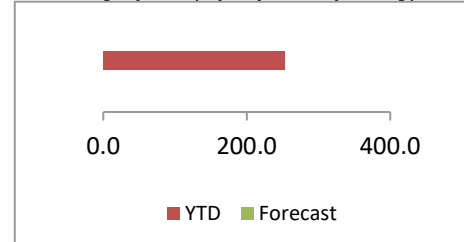


Annual Indicators

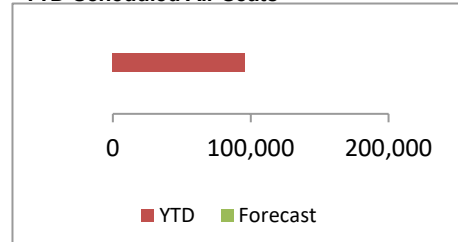
YTD Visitor Days



YTD Daily Spend (\$ per person per day)



YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

irlift (scheduled seats)

Hawai'i Tourism Authority Report Date: **Mar-20** *Preliminary*

Visitor Industry Performance Measures

Market: **EUROPE**

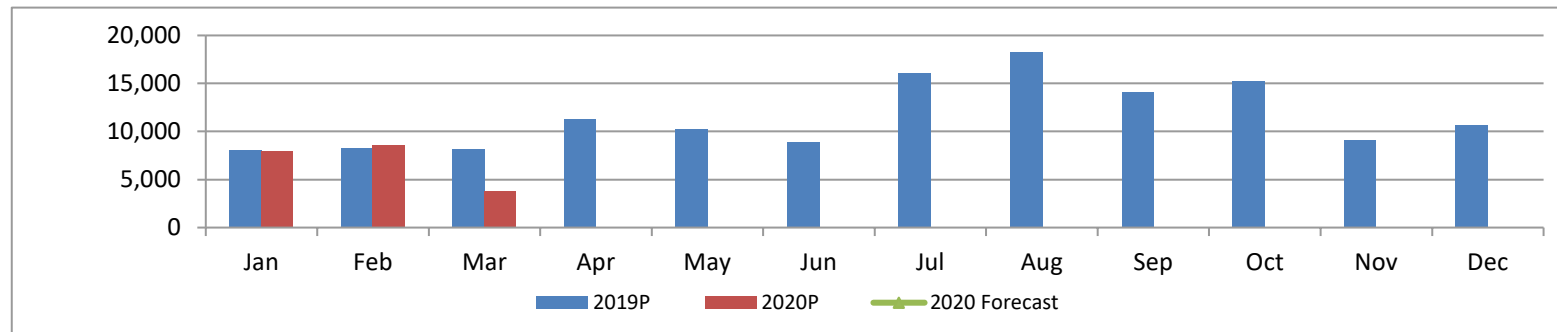
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-24.6%	38.4	N/A	O'ahu	-17.4%	14,709
Daily Spend (\$pppd)	N/A	-6.6%	143.0	N/A	Maui	-21.2%	8,293
Visitor Days	N/A	-19.2%	268,300	N/A	Moloka'i	6.6%	357
Arrivals	N/A	-16.9%	20,395	N/A	Lāna'i	-15.7%	241
Daily Census	N/A	-20.1%	2,948	N/A	Kaua'i	-18.0%	4,907
Airlift (scheduled seats)	N/A	N/A	N/A	N/A	Hawai'i Island	-9.1%	6,509

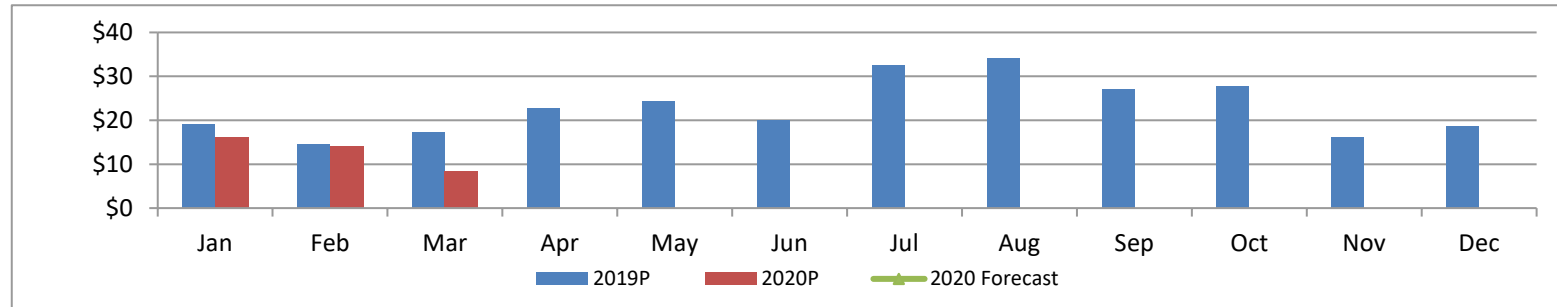
*DBEDT 2020 Forecast not yet available

Monthly Indicators

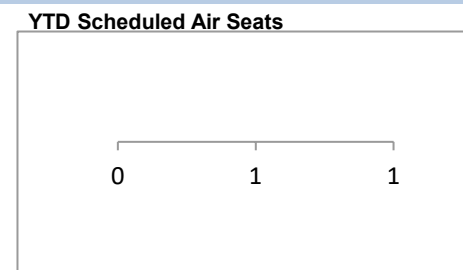
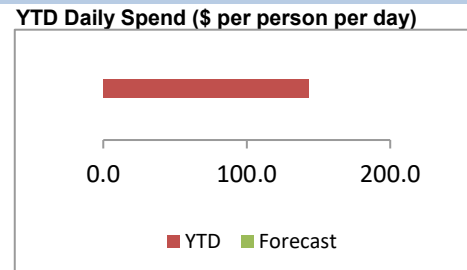
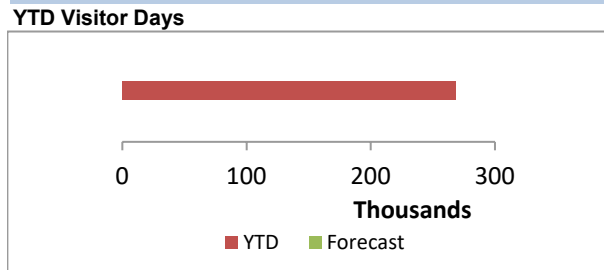
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

airlift (scheduled seats)

Hawai'i Tourism Authority Report Date: **Mar-20** Preliminary

Visitor Industry Performance Measures

Market: **LATIN AMERICA**

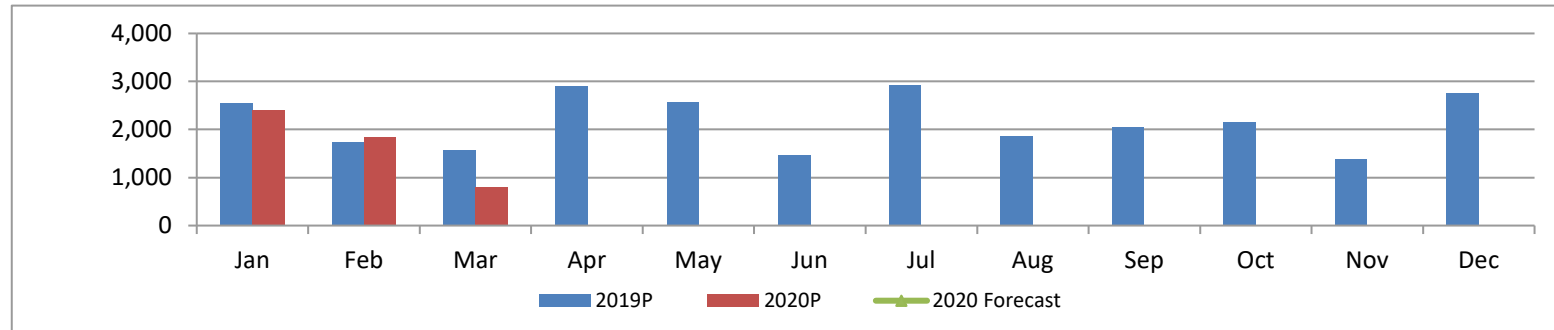
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	-15.8%	12.5	N/A	O'ahu	-15.9%	3,864
Daily Spend (\$pppd)	N/A	2.9%	234.4	N/A	Maui	-14.0%	1,711
Visitor Days	N/A	-18.2%	53,153	N/A	Moloka'i	-34.7%	20
Arrivals	N/A	-13.6%	5,057	N/A	Lāna'i	23.8%	50
Daily Census	N/A	-19.1%	584	N/A	Kaua'i	-14.6%	567
Airlift (scheduled seats)	N/A	N/A	N/A	N/A	Hawai'i Island	-13.6%	748

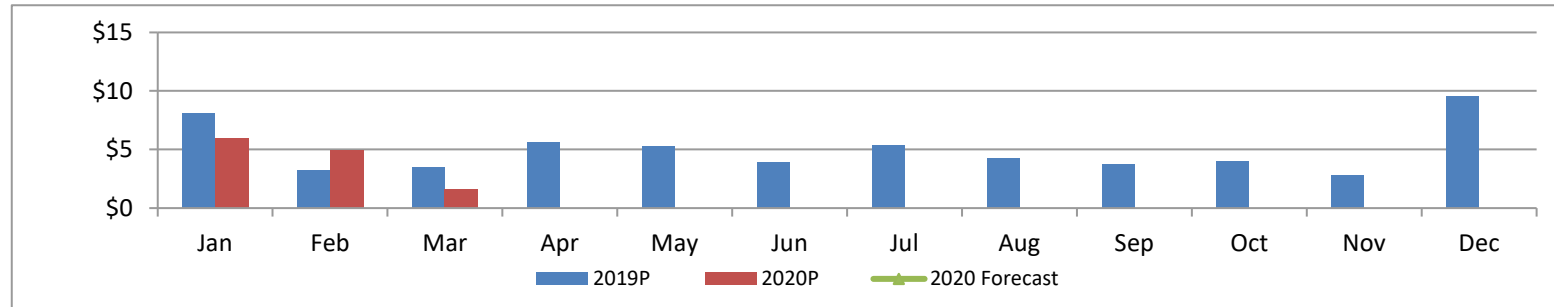
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

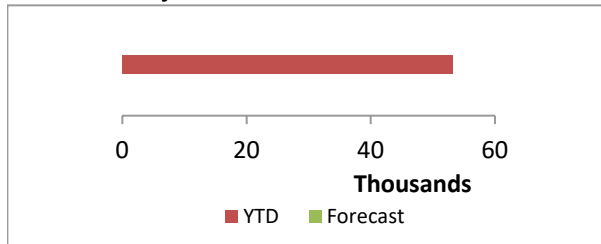


Monthly Visitor Expenditures (\$mil)

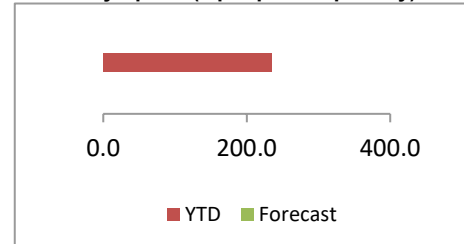


Annual Indicators

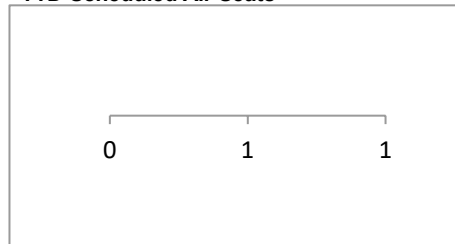
YTD Visitor Days



YTD Daily Spend (\$ per person per day)



YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures



Market Insights – April 2020

The HTA Monthly Market Insights reports on the most recent key performance indicators that the Hawai'i Tourism Authority (HTA) uses to measure success. The following measures provide indicators of the overall health of Hawai'i's visitor industry and help to gauge if the HTA is successfully attaining its goals.

Report on Economic Impact

Expanded travel restrictions were carried out in April 2020, aimed at stopping the spread of COVID-19. Since March 26, all passengers arriving from out-of-state are required to abide by a mandatory 14-day self-quarantine. Effective April 1, a 14-day quarantine is required for all interisland travelers, who are being told to travel only for essential reasons like work or health care. The counties enforced stricter stay-at-home orders and curfews. Nearly all trans-Pacific flights to Hawai'i were cancelled in April 2020. Additionally, the U.S. Centers for Disease Control and Prevention (CDC) issued a no sail order on all cruise ships until late July 2020.

Visitor spending data were not available in April 2020. A total of 4,564 visitors traveled to Hawai'i by air service (-99.5%) compared to 856,250 total visitors (by air and by cruise ships) who came in April 2019. Most of the visitors in April 2020 were from U.S. West (3,016 visitors, -99.2%) and U.S. East (1,229, -99.2%). A handful of visitors came from Japan (13 visitors), Canada (9 visitors) and All Other International Markets (298 visitors).

For the first four months of 2020, Hawai'i's tourism economy experienced:

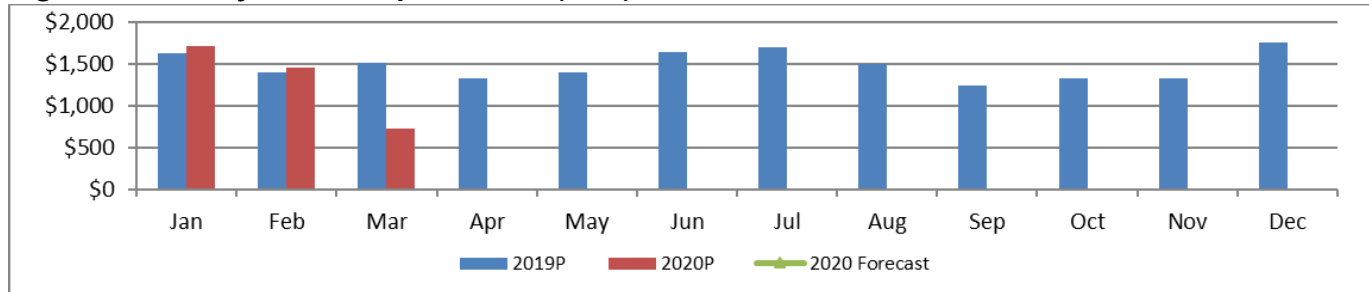
- Total arrivals dropped 37.3 percent to 2,130,051 visitors, with considerably fewer arrivals by air service (-37.0% to 2,100,259) and by cruise ships (-53.8% to 29,792) versus a year ago. Total visitor days fell 34.5 percent.
- Through March 2020, the state collected \$516.8 million in TAT, an increase of 14.9 percent compared to FY 2019 through March 2019.
- Total air capacity (scheduled and charter seats) into Hawai'i declined 24.7 percent to 3,348,785 seats.

Table 1: Overall Key Performance Indicators – Total (Air + Cruise) – YTD April 2020

	% of Forecast	YOY Rate	Apr. YTD	Forecast
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A
Visitor Days	N/A	-34.5%	19,687,461	N/A
Arrivals	N/A	-37.3%	2,130,051	N/A
Daily Census	N/A	-35.1%	162,706	N/A
Airlift (scheduled seats)	N/A	-25.0%	3,312,827	N/A

DBEDT 2020 forecasts were not available at the time of report publication.

Figure 1: Monthly Visitor Expenditures (\$mil)



Major Market Areas (MMAs)

USA

Table 2: Key Performance Indicators - U.S. Total

	% of Forecast	YOY Rate	Apr. YTD	Forecast
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A
Visitor Days	N/A	-30.8%	13,592,374	N/A
Arrivals	N/A	-33.8%	1,427,436	N/A
Daily Census	N/A	-31.4%	112,334	N/A
Airlift (scheduled seats)	N/A	-20.4%	2,433,005	N/A

DBEDT 2020 forecasts were not available at the time of this report.

- The April U.S. forecast shows an unprecedented -29 percent annualized rate of decline in Q2 real GDP, reflecting the economic drag of widespread social mitigation policies across the U.S.
- The unemployment rate for April was 14.7 percent, a +10.3 percent increase from March.
- The Conference Board Consumer Confidence Index declined sharply in March, following an increase in February. The Index now stands at 86.9 (1985=100), down from 118.6 in March. The Present Situation Index – based on consumers’ assessment of current business and labor market conditions – decreased from 166.7 to 76.4.
- U.S. based wholesalers are focusing on future sales (late summer, fall and beyond) and education. Most wholesalers are working on recovery plans that are currently more in the inspirational phase -- dream today/book tomorrow.
- All U.S. domestic carriers have extended grounding of the Boeing MAX through September 2020 at the earliest.

US WEST

Table 3: Key Performance Indicators - U.S. West

	% of Forecast	YOY Rate	Apr. YTD	Forecast
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A
Visitor Days	N/A	-33.2%	8,247,640	N/A
Arrivals	N/A	-35.8%	911,899	N/A
Daily Census	N/A	-33.8%	68,162	N/A
Airlift (scheduled seats)	N/A	-21.2%	2,100,170	N/A

DBEDT 2020 forecasts were not available at the time of report publication.

- In April, there were 3,016 visitors from U.S. West compared to 390,801 visitors in April 2019. Year-to-date, arrivals decreased 35.8 percent to 911,899 visitors.

US EAST

Table 4: Key Performance Indicators - U.S. East

	% of Forecast	YOY Rate	Apr. YTD	Forecast
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A
Visitor Days	N/A	-26.8%	5,344,734	N/A
Arrivals	N/A	-30.0%	515,537	N/A
Daily Census	N/A	-27.4%	44,171	N/A
Airlift (scheduled seats)	N/A	-14.7%	332,835	N/A

DBEDT 2020 forecasts were not available at the time of report publication.

- In April, 1,299 visitors arrived from U.S. East compared to 157,256 visitors in April 2019. Year-to-date, arrivals dropped 30.0 percent to 515,537 visitors.

CANADA

Table 5: Key Performance Indicators – Canada

	% of Forecast	YOY Rate	Apr. YTD	Forecast
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A
Visitor Days	N/A	-37.8%	2,053,718	N/A
Arrivals	N/A	-41.3%	155,744	N/A
Daily Census	N/A	-38.3%	16,973	N/A
Airlift (scheduled seats)	N/A	-38.9%	164,881	N/A

DBEDT 2020 forecasts were not available at the time of report publication

- In April, nine visitors arrived from Canada compared to 55,690 visitors a year ago. Year-to-date arrivals decreased to 155,744 visitors (-41.3%).
- According to the International Monetary Fund, Canada's GDP is expected to contract 6.2 percent this year. This will be an eight-percentage-point decline from its forecast of 1.8 percent growth in January.
- Canadian employment plunged by nearly two million people and the jobless rate surged to 13 percent in April as companies were forced to slash payroll in response to restrictive lockdown measures aimed at curbing the spread of the coronavirus. The federal government has committed more than \$100 billion in economic measures to help individuals and businesses get through the crisis.
- The Canadian Dollar averaged USD \$0.76 cents throughout the first two months of 2020, a similar value as in 2019 (0.5%). In March and April the volatility of oil prices and the COVID-19 financial crisis brought the value of the Canadian Dollar down to USD \$0.72.
- After posting the largest monthly decline ever recorded last month, the consumer confidence index has now plummeted to 47.6, its lowest level ever. Because of COVID-19, the index has fallen an astounding 73 points in just two months. Every region except Quebec and Atlantic Canada is at a record low.

- According to the Summer Travel Intention report of the Conference Board of Canada, amidst the global COVID-19 pandemic, summer travel intentions have fallen to the lowest level ever. Just 45 percent of Canadians are currently planning an overnight leisure trip, and two-thirds of this activity will be within Canada. Of those who have selected a destination, only 31 percent have plans to leave the country, with sixty percent of these trips intended for the latter half of the season.
- Air Canada is suspending most international flights through June, including Hawaii. As for WestJet, the airline has suspended service to Hawai'i as of March 27. The 737 MAX 8 landing has also significantly affected Canadian carriers. All Canadian carriers have extended grounding of the Boeing MAX thorough September 2020 at the earliest.
- The Canadian border remains closed and only Canadians citizens and Canadian permanent residents are currently allowed into the country.

JAPAN

Table 6: Key Performance Indicators – Japan

	% of Forecast	YOY Rate	Apr. YTD	Forecast
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A
Visitor Days	N/A	-40.1%	1,729,882	N/A
Arrivals	N/A	-40.5%	294,241	N/A
Daily Census	N/A	-40.6%	14,297	N/A
Airlift (scheduled seats)	N/A	-29.9%	466,072	N/A

DBEDT 2020 forecasts were not available at the time of report publication.

- In April, there were 13 visitors from Japan compared to 119,492 visitors in April 2019. Year-to-date, arrivals fell 40.5 percent to 294,241 visitors.
- The exchange rate was at 107.29 JPY to USD in March 2020, gaining value over the USD as the Japanese Government expanded its stimulus package to support companies impacted by COVID-19. The exchange rate was at 107.93 JPY to USD in April 2020, relatively maintaining its value over the USD as the Bank of Japan expanded its stimulus to help companies hit by COVID-19 by pledging to buy an unlimited amount of bonds to keep borrowing costs low.
- The Japanese economy shrunk by 0.9 percent in Q1 of 2020 compared to the previous quarter, according to data released by the Japanese government. While this was slightly better than the 1.2 percent forecast from a poll of analysts, this marked two consecutive quarters of decline, indicating the economy to be entering a recession.
- Analysts warn that the Q1 results do not encompass the full effects of COVID-19, with many predicting more significant drops to follow in Q2. Private consumption, which accounts for more than half of Japan's economy declined by 0.7 percent, even before the government declared a state of emergency. Exports which make up 16 percent of the economy also shrank by 6 percent in the quarter as trade with major trading countries plummeted. Such effects are expected to last well into Q2 of 2020.
- The COVID-19 outbreak continued to spread in Japan throughout April, with confirmed cases rising to over 14,000 in the month. On 4/7, the Japanese government officially declared a state of emergency for high-risk regions such as Tokyo and Osaka. The declaration was

then expanded to cover the entire nation on 4/16. With this, all residents in Japan were asked to stay at home and only leave their homes for essential business.

- The travel industry is taking significant hits as an increasing amount of travel restrictions are being imposed. All direct flights between Japan and Hawai'i are currently suspended, with most airlines announcing that the suspension will extend throughout June. Major travel agencies are also canceling all of their international tour products through June.
- Instead of returning to full originally scheduled operations, airlines will be phasing in their return of service. Travel agencies will also be focusing initially on recovery of domestic travel demand as the Japan Tourism Agency issued recovery funds for the travel industry focused on revitalizing domestic and inbound tourism.
- Latest studies on Japanese outbound travelers found that outbound travel declined by 99.8 percent to 3,900 year over year in April, marking the sharp drop in outbound tourism as measures against COVID-19 were enforced and flights were canceled.
- All airlines have suspended flights as travel demand declines and travel restrictions are imposed. A list of currently announced flight changes for Hawai'i are as follows:
 - All Nippon Airways: suspension of all services through June 15.
 - Delta Air Lines: suspension of all services through June.
 - Hawaiian Airlines: suspension of all services excluding their second HND – HNL route, HND – KOA route and CTS – HNL route through June 14. Suspension of the second HND – HNL route and HND – KOA route through June. Suspension of the CTS – HNL route through 7/19.
 - Japan Airlines: suspension of all services through June.
 - United Airlines: suspension of all services through July 4.
 - Korean Air: suspension of all services through July 16.
 - Air Asia X: suspension of all services through June.

OCEANIA

Table 7: Key Performance Indicators – Oceania

	% of Forecast	YOY Rate	Apr. YTD	Forecast
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A
Visitor Days	N/A	-39.0%	566,363	N/A
Arrivals	N/A	-39.0%	60,758	N/A
Daily Census	N/A	-39.5%	4,681	N/A
Airlift (scheduled seats)	N/A	-39.7%	95,737	N/A

DBEDT 2020 forecasts were not available at the time of report publication.

- Australia: Three visitors came in April compared to 23,473 visitors in April 2019. Through the first four months of 2020, arrivals dropped 38.1 percent to 50,070 visitors versus a year ago.
- Australia spent the month in a state of lockdown with a directive to leave home for essential needs only. The total travel ban remains in effect and some Australian states have closed their borders. With over two thirds of confirmed COVID-19 cases occurring in returned

travelers or tourists, Australia has enacted a mandatory two weeks in quarantine for all arrivals. At the end of the month, there were 6,750 cases and 91 fatalities reported.

- Australian Bureau of Statistics figures show that the number of jobs in Australia fell by 7.5% between mid-March and mid-April. The Treasury department estimates that unemployment will double in the June Quarter from 5.1% to 10%. The AU\$ began the month at US\$0.60 but rose to a more stable US\$0.64 at the end of the month.
- New Zealand: There were five visitors in April 2020 versus 7,363 visitors last April. Through the first four months of 2020, arrivals declined to 10,687 visitors (-42.6%).
- New Zealand's decision to act quickly and strictly around a full lockdown and closing of borders appears to have paid off. New Zealand had been showing very low statistics of COVID-19 spread through the first half of March and now, following the government implementations the country is down to just 2-3 new cases a day, with some days showing zero.
- From an economic perspective, the push is now for the government to lessen restrictions and begin opening up business activity. The country is about to move from level 3 to level 2 which should see the economic recovery start. This includes the opening of domestic tourism. The management of COVID-19 in New Zealand has seen the exchange rate recover from US\$0.56 in late March to US\$0.61 at the end of April.

EUROPE

Table 8: Key Performance Indicators – Europe

	% of Forecast	YOY Rate	Apr. YTD	Forecast
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A
Visitor Days	N/A	-43.1%	268,630	N/A
Arrivals	N/A	-43.1%	20,419	N/A
Daily Census	N/A	-43.6%	2,220	N/A
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

DBEDT 2020 forecasts were not available at the time of report publication.

- There were 24 visitors from Europe (United Kingdom, France, Germany, Italy and Switzerland) versus 11,321 visitors in April 2019. Through the first four months of 2020, arrivals decreased 43.1 percent to 20,419 visitors.

CHINA

Table 9: Key Performance Indicators – China

	% of Forecast	YOY Rate	Apr. YTD	Forecast
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A
Visitor Days	N/A	-70.9%	88,175	N/A
Arrivals	N/A	-72.2%	9,958	N/A
Daily Census	N/A	-71.1%	729	N/A
Airlift (scheduled seats)	N/A	-81.9%	8,176	N/A

DBEDT 2020 forecasts were not available at the time of report publication.

- Six visitor came in April in comparison to 6,516 visitors in April 2019. Year-to-date, arrivals decreased 72.2 percent to 9,958 visitors.

- China's economy shrank by 6.8 percent in the first quarter of 2020, the first contraction since the end of the Cultural Revolution in 1976, confirming the economic damage done by the coronavirus pandemic. China still remains the world's second-largest economy and the latest forecast is growth of 1.2 percent this year.
- China's central bank cut the interest rate on its targeted medium-term lending facility (TMLF) on April 24, 2020, following similar reductions to borrowing costs on other liquidity tools in the past few weeks to support the economy. The central bank also injected 56.1 billion yuan (US\$7.93 billion) into the economy, when a batch of 267.4 billion yuan of TMLF loans was due to expire.
- To support travel agencies recovery especially for outbound industry, ICBC and the Ministry of Culture and Tourism of the People's Republic of China signed a strategic cooperation agreement to assist cultural and tourism businesses. ICBC plans to provide up to 100 billion CNY (US\$ 14.5 billion) in financing and credit to these businesses for them to resume work.

KOREA

Table 10: Key Performance Indicators – Korea

	% of Forecast	YOY Rate	Apr. YTD	Forecast
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A
Visitor Days	N/A	-43.6%	348,078	N/A
Arrivals	N/A	-46.7%	41,629	N/A
Daily Census	N/A	-44.1%	2,877	N/A
Airlift (scheduled seats)	N/A	-36.0%	71,175	N/A

DBEDT 2020 forecasts were not available at the time of report publication.

- There were 15 visitors in April versus 14,900 visitors a year ago. Through the first four months of 2020, arrivals fell 46.7 percent to 41,629 visitors.
- According to the Korea Development Institute (KDI), Korea's economy will be hit hardest by COVID-19 in the first half of this year and begin recovery in the second half, marking a record low of 0.2 percent rate for 2020.
- President Moon won the National Parliamentary election on April 15 since Moon administration was assessed by Koreans that government has handling COVID-19 outbreak under tight control. Korean government declared an end to the 6-week social distancing campaign as date of May 6.
- The average USD/WON exchange rate in April was 1223.07 won, a slight increase from the previous rate of 1216.54 won in March.
- Korea Tourism Organization (KTO) reported the number of outbound trips plummeted by 93.9 percent on-year to 143,366 passengers in March, following 60 percent on-year decline in February with a total of 1,046,779 outbound trips.
- Domestic travel market in April rebounded in line with extended holidays from the late April since the number of new daily confirmed cases has been slowing down. In terms of bookings for accommodations, Gangwon province, Gyeonggi province and Jeju Island showed
- Korean Air suspended its flight services on ICN-HNL route (KE053) and ICN-NRT-HNL route (KE001) till June 30, 2020.

- Asiana Airlines cut the flights service of ICN-HNL route (OZ232) until June 30, 2020.
- Hawaiian Airlines has halted its flight service of ICN-HNL routes from March 2 through June 15, 2020.

TAIWAN

Table 11: Key Performance Indicators – Taiwan

	% of Forecast	YOY Rate	Apr. YTD	Forecast
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A
Visitor Days	N/A	-45.6%	33,198	N/A
Arrivals	N/A	-44.6%	3,453	N/A
Daily Census	N/A	-46.0%	274	N/A
Airlift (scheduled seats)	N/A	-29.4%	7,344	N/A

DBEDT 2020 forecasts were not available at the time of report publication.

- There were five visitors in April compared to 1,288 visitors in April 2019. Year-to-date, arrivals dropped 44.6 percent to 3,453 visitors.
- In view of the slowdown of COVID-19 spread in Taiwan, the Central Epidemic Command Center has gradually relaxed regulations to contain the coronavirus. However, the people are advised to practice preventive measures such as social distancing and wearing a face mask to prevent contamination.
- Due to the on-going COVID-19 pandemic in overseas destinations, Taiwan government has extended the travel restrictions imposed on inbound group visitors and to embargo outbound group tours to June 30.
- A 3-step Tourism Reboot Plan is announced to revive the Taiwan travel market. The first step is to relax regulations for public transportations while the second step is to promote attractions and activities in Taiwan. The final step will be to reopen the borders to welcome international visitors in October 2020.
- China Airlines, the national carrier operating non-stop services between Taiwan and Honolulu, is currently assessing the timing to resume the route.

LATIN AMERICA

Table 122: Key Performance Indicators – Latin America

	% of Forecast	YOY Rate	Apr. YTD	Forecast
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A
Visitor Days	N/A	-43.0%	53,330	N/A
Arrivals	N/A	-42.2%	5,062	N/A
Daily Census	N/A	-43.4%	441	N/A
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

DBEDT 2020 forecasts were not available at the time of report publication.

- Six visitors came from Latin America (Mexico, Brazil and Argentina) in April compared to 2,910 visitors in April 2019. Year-to-date, arrivals dropped 42.2 percent to 5,062 visitors.

ISLAND VISITATION:

- **O'ahu** : Total visitor days dropped 97.5 percent compared to April 2019. There were 3,150 visitors on O'ahu in April versus 494,125 visitors in April 2019. Through the first four months of 2020, visitor arrivals decreased 37.9 percent to 1,226,162 visitors.
- **Maui**: In April, total visitor days decreased 99.3 percent from a year ago. There were 647 Visitors on Maui compared to, 248,042 visitors in April 2019. Year-to-date, arrivals dropped 38.4 percent to 603,835 visitors.
- **Hawai'i Island**: In April, visitor days decreased 97.9 percent from a year ago. There were 705 visitors on Hawaii island compared to 130,364 visitors in April 2019. Through the first four months, arrivals dropped 33.4 percent to 390,843 visitors.
- **Kaua'i**: In April, visitor days declined 99.2 percent. There were 308 visitors compared to 105,792 visitors in April 2019. Through the first four months of 2020, arrivals decreased 36.0 percent to 281,989 visitors.

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Apr-20** *Preliminary*

Visitor Industry Performance Measures

Market: **OVERALL**

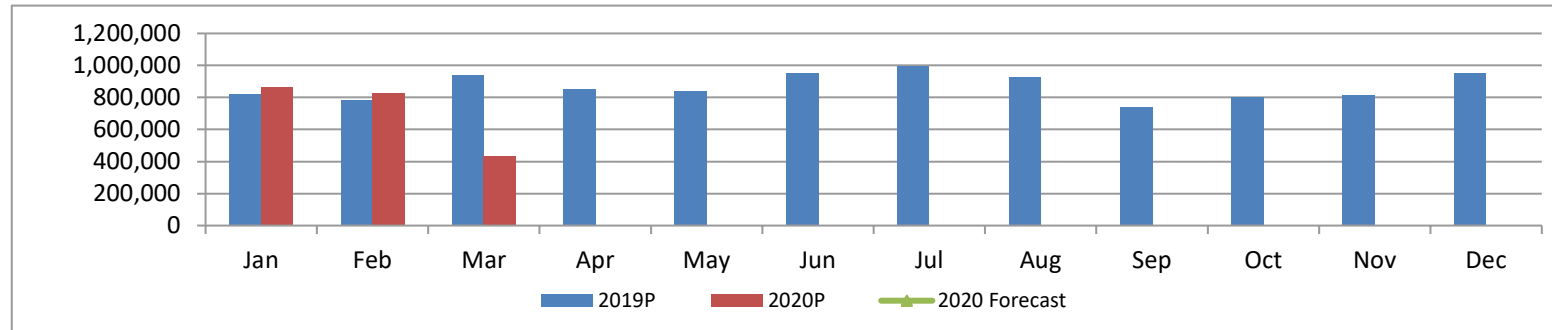
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A	O'ahu	-37.9%	1,226,162
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A	Maui	-38.4%	603,835
Visitor Days	N/A	-34.5%	19,687,461	N/A	Moloka'i	-29.5%	14,319
Arrivals	N/A	-37.3%	2,130,051	N/A	Lāna'i	-48.0%	14,892
Daily Census	N/A	-35.1%	162,706	N/A	Kaua'i	-36.0%	281,989
Airlift (scheduled seats)	N/A	-25.0%	3,312,827	N/A	Hawai'i Island	-33.4%	390,843

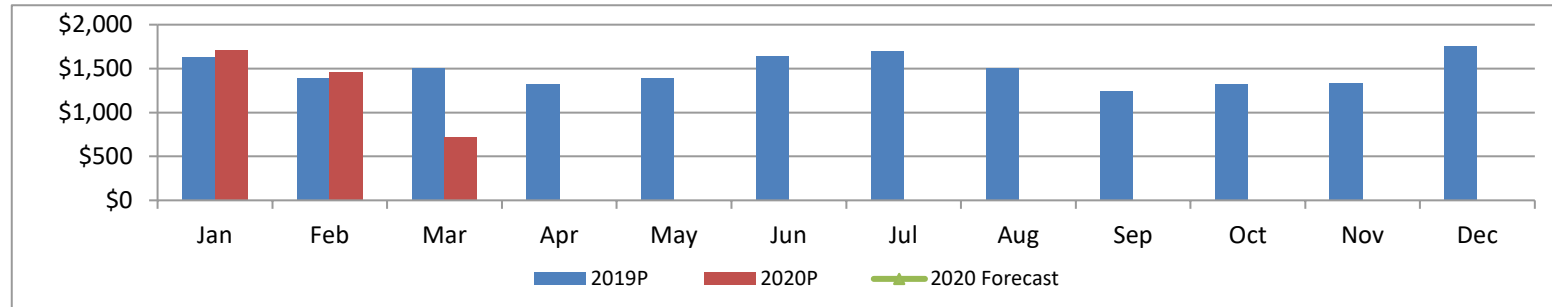
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

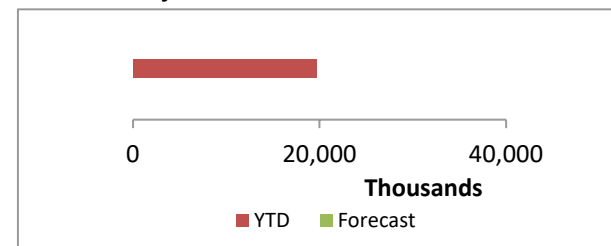


Monthly Visitor Expenditures (\$mil)

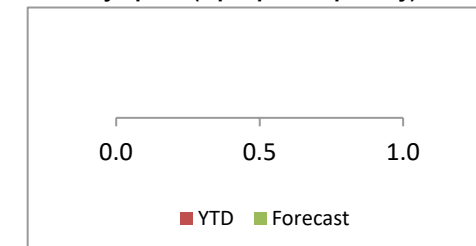


Annual Indicators

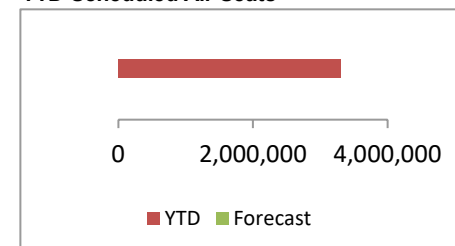
YTD Visitor Days



YTD Daily Spend (\$ per person per day)



YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Apr-20** *Preliminary*

Visitor Industry Performance Measures

Market: **U.S. TOTAL**

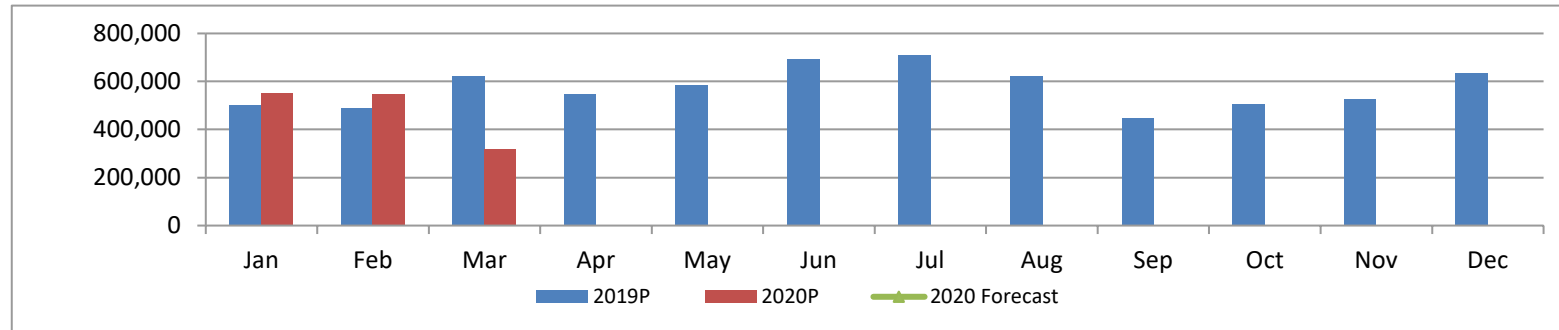
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A		O'ahu	-32.6%	694,431
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A		Maui	-35.4%	478,615
Visitor Days	N/A	-30.8%	13,592,374	N/A		Moloka'i	-33.2%	9,674
Arrivals	N/A	-33.8%	1,427,436	N/A		Lāna'i	-35.4%	11,545
Daily Census	N/A	-31.4%	112,334	N/A		Kaua'i	-34.4%	233,347
Airlift (scheduled seats)	N/A	-20.4%	2,433,005	N/A		Hawai'i Island	-30.6%	281,287

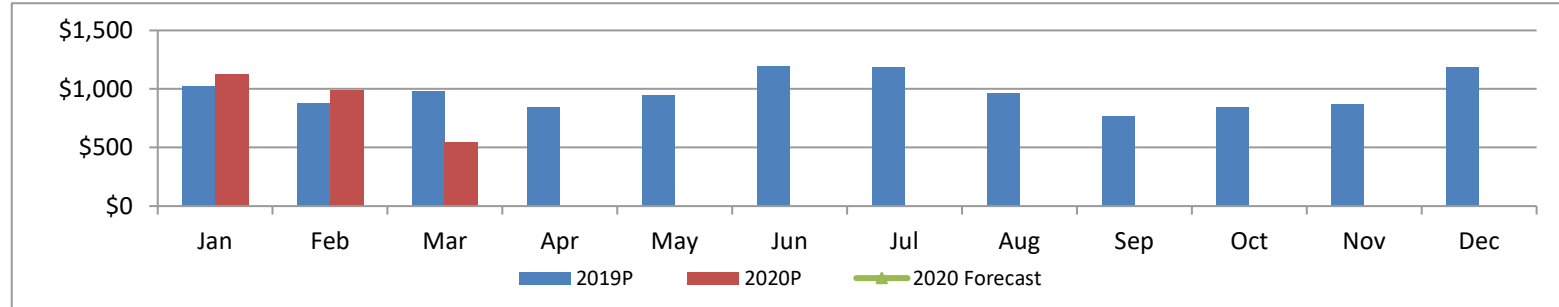
*DBEDT 2020 Forecast not yet available

Monthly Indicators

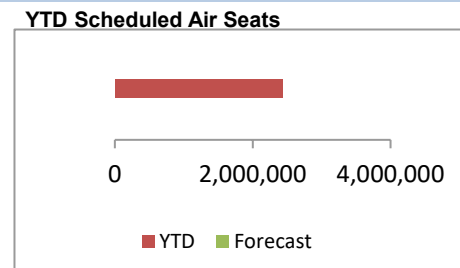
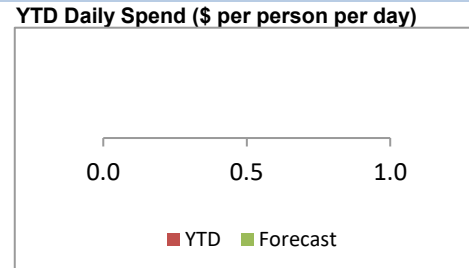
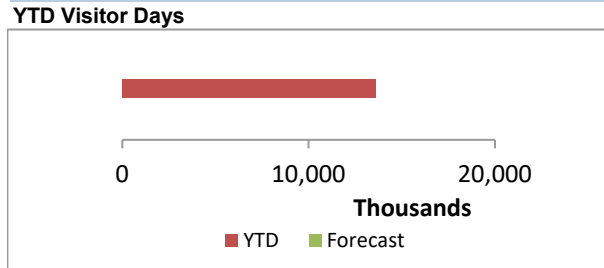
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Apr-20** *Preliminary*

Visitor Industry Performance Measures

Market: **U.S. WEST**

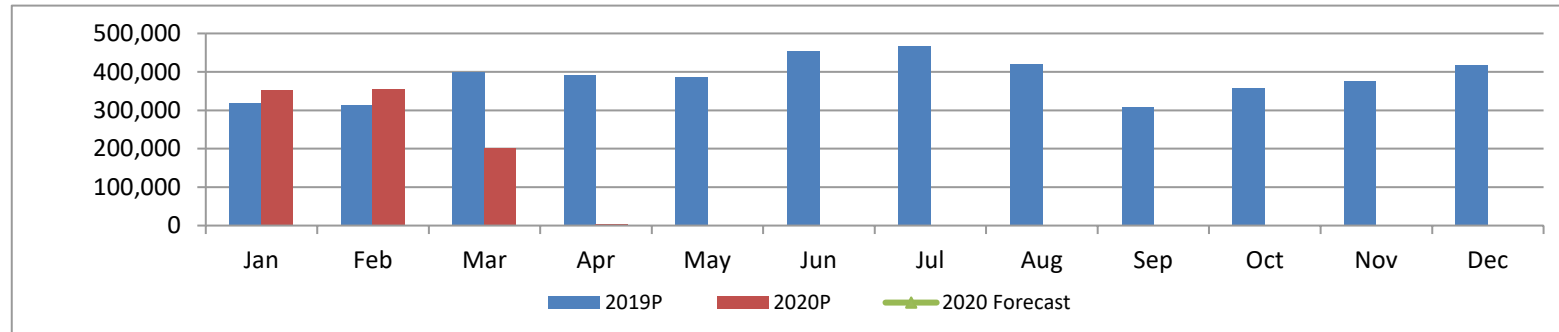
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A		O'ahu	-34.5%	405,565
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A		Maui	-37.8%	295,312
Visitor Days	N/A	-33.2%	8,247,640	N/A		Moloka'i	-36.8%	5,734
Arrivals	N/A	-35.8%	911,899	N/A		Lāna'i	-37.0%	6,134
Daily Census	N/A	-33.8%	68,162	N/A		Kaua'i	-36.0%	142,653
Airlift (scheduled seats)	N/A	-21.2%	2,100,170	N/A		Hawai'i Island	-32.6%	173,740

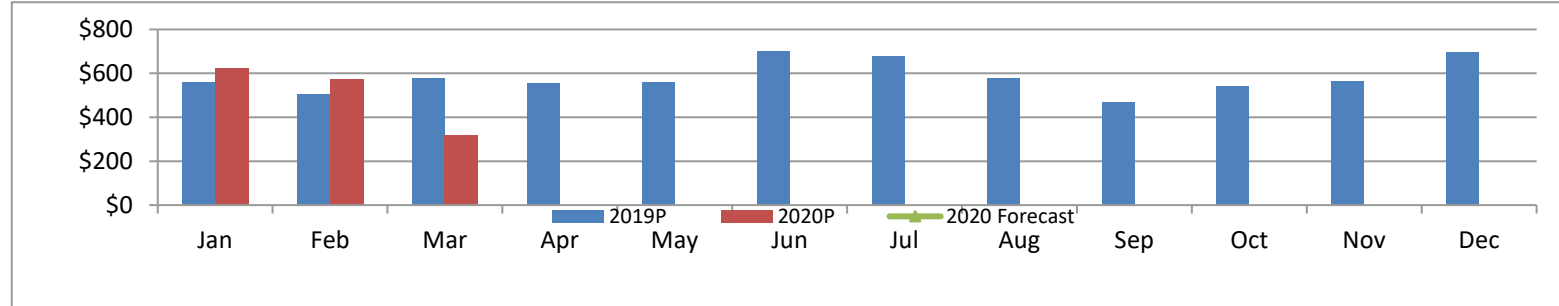
*DBEDT 2020 Forecast not yet available

Monthly Indicators

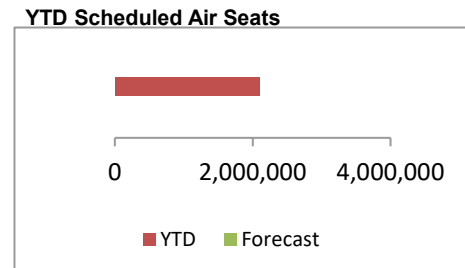
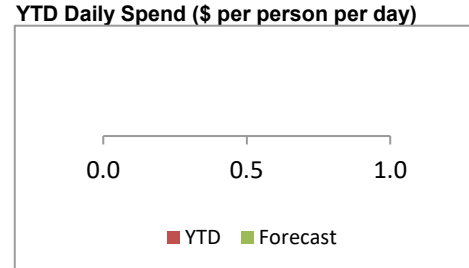
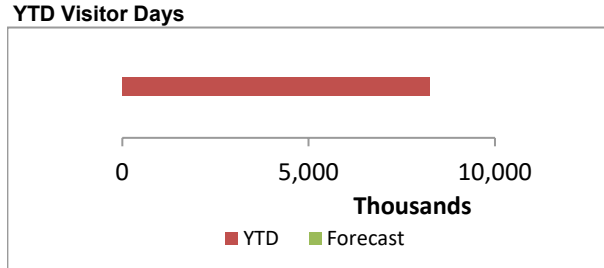
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Apr-20** *Preliminary*

Visitor Industry Performance Measures

Market: **U.S. EAST**

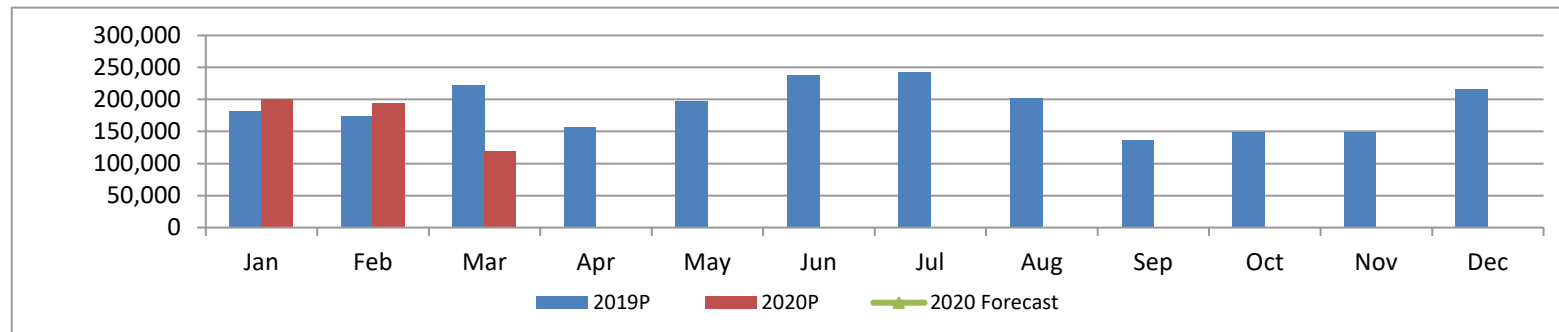
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A		O'ahu	-29.7%	288,866
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A		Mau	-31.0%	183,303
Visitor Days	N/A	-26.8%	5,344,734	N/A		Moloka'i	-27.2%	3,940
Arrivals	N/A	-30.0%	515,537	N/A		Lāna'i	-33.6%	5,411
Daily Census	N/A	-27.4%	44,171	N/A		Kaua'i	-31.6%	90,694
Airlift (scheduled seats)	N/A	-14.7%	332,835	N/A		Hawai'i Island	-27.0%	107,547

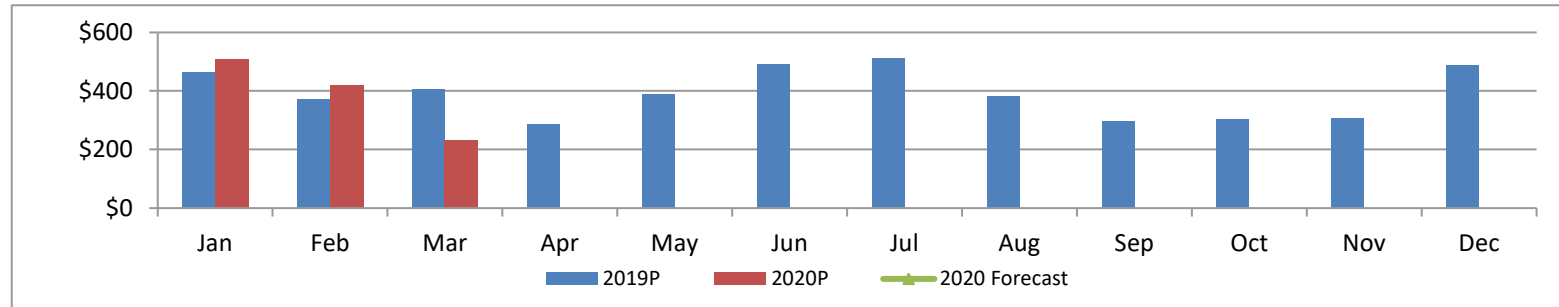
*DBEDT 2020 Forecast not yet available

Monthly Indicators

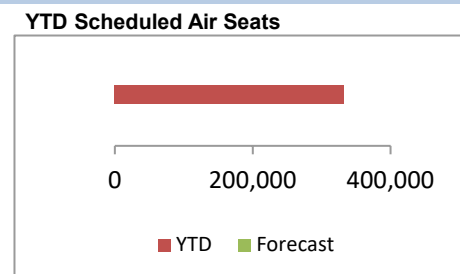
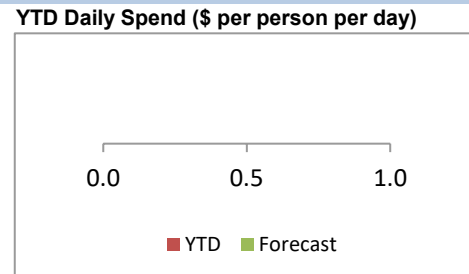
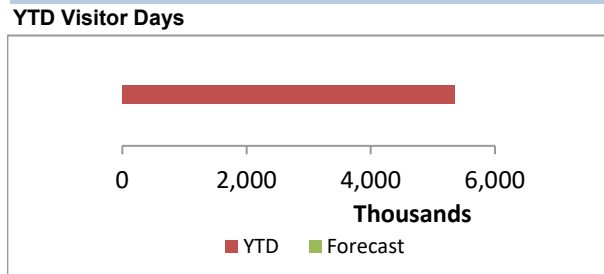
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Apr-20** *Preliminary*

Visitor Industry Performance Measures

Market: **CANADA**

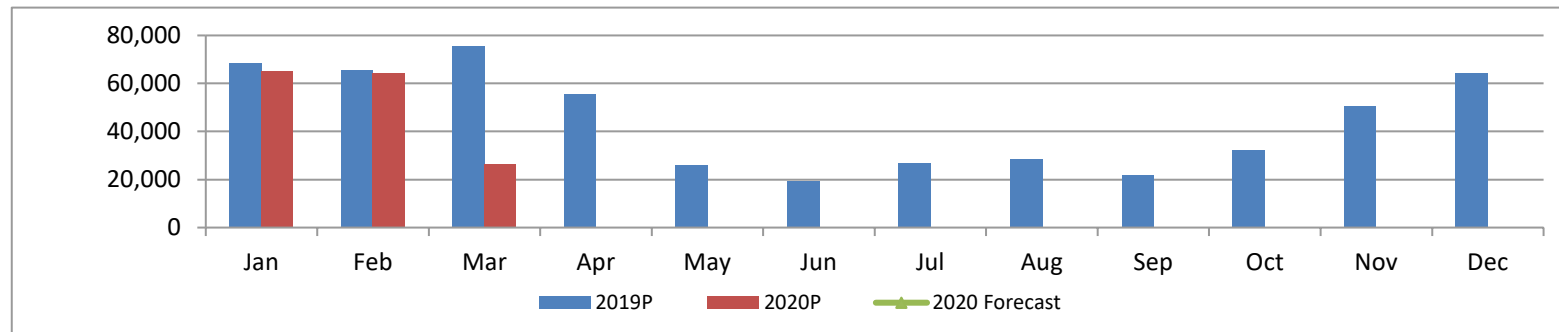
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A		O'ahu	-40.3%	61,639
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A		Maui	-45.8%	71,080
Visitor Days	N/A	-37.8%	2,053,718	N/A		Moloka'i	-54.2%	1,023
Arrivals	N/A	-41.3%	155,744	N/A		Lāna'i	-40.8%	1,556
Daily Census	N/A	-38.3%	16,973	N/A		Kaua'i	-42.1%	22,561
Airlift (scheduled seats)	N/A	-38.9%	164,881	N/A		Hawai'i Island	-27.1%	35,799

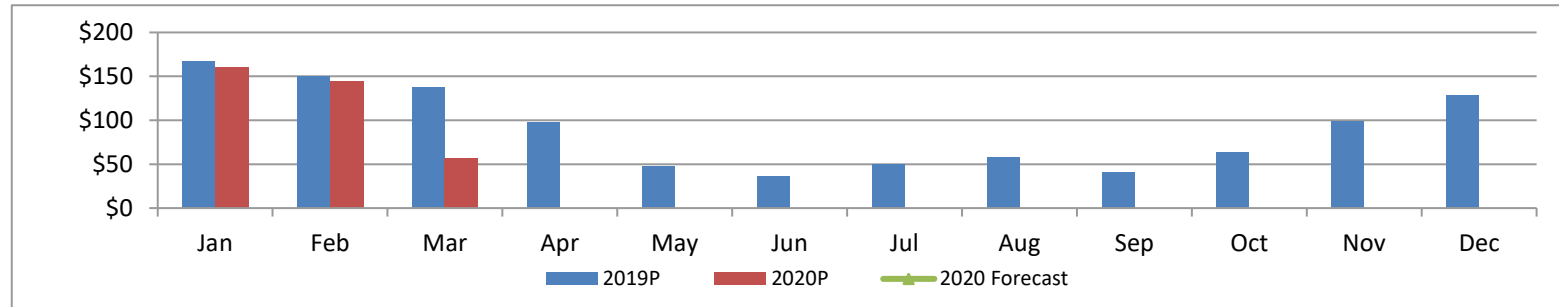
*DBEDT 2020 Forecast not yet available

Monthly Indicators

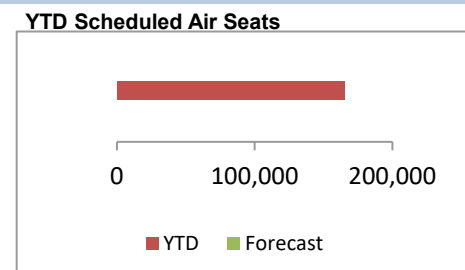
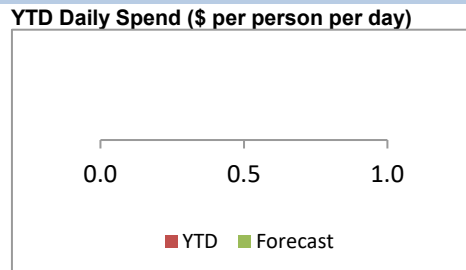
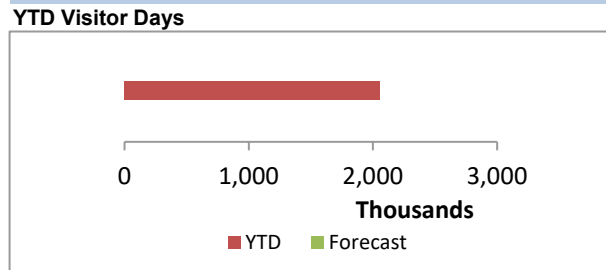
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Apr-20** *Preliminary*

Visitor Industry Performance Measures

Market: **JAPAN**

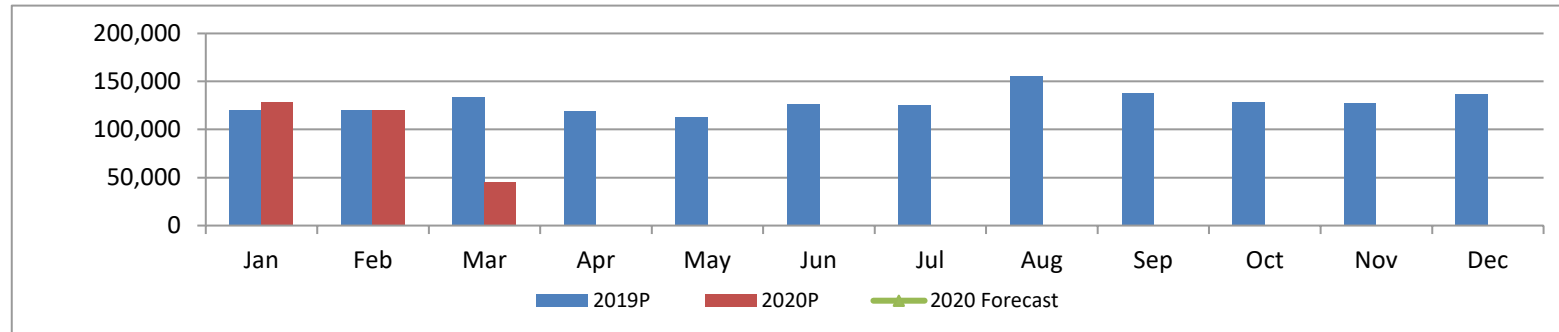
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A		O'ahu	-41.6%	274,533
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A		Maui	-49.9%	8,132
Visitor Days	N/A	-40.1%	1,729,882	N/A		Moloka'i	6.9%	421
Arrivals	N/A	-40.5%	294,241	N/A		Lāna'i	-78.8%	133
Daily Census	N/A	-40.6%	14,297	N/A		Kaua'i	-56.8%	3,699
Airlift (scheduled seats)	N/A	-29.9%	466,072	N/A		Hawai'i Island	-22.9%	35,893

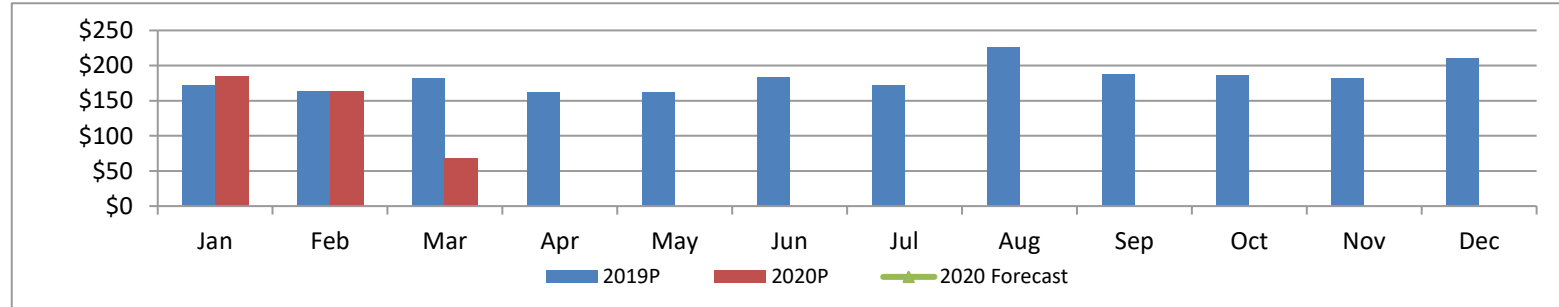
*DBEDT 2020 Forecast not yet available

Monthly Indicators

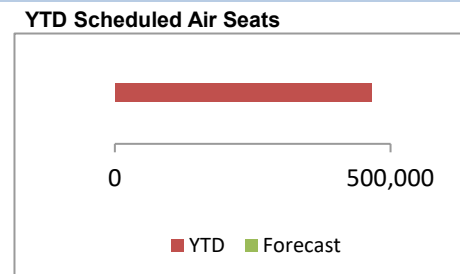
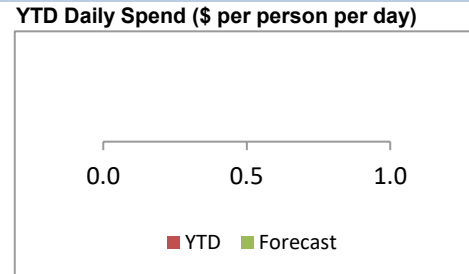
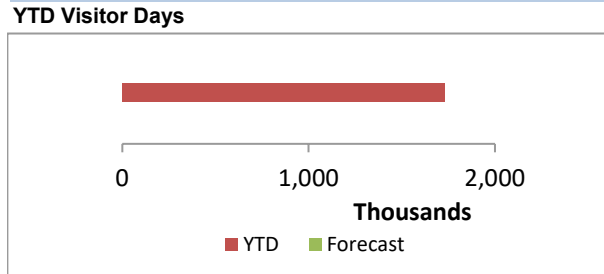
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Apr-20** *Preliminary*

Visitor Industry Performance Measures

Market: **CHINA**

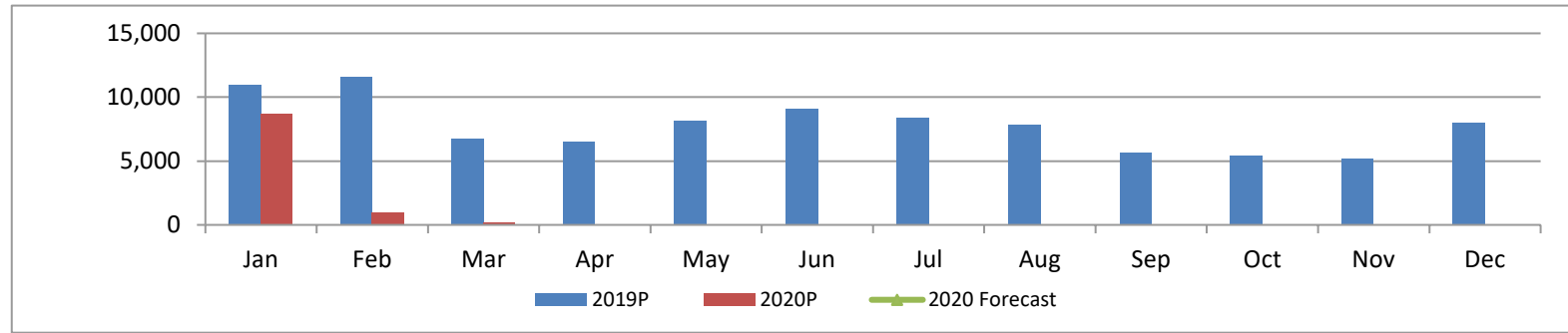
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A		O'ahu	-72.5%	9,519
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A		Maui	-72.4%	2,386
Visitor Days	N/A	-70.9%	88,175	N/A		Moloka'i	-70.8%	75
Arrivals	N/A	-72.2%	9,958	N/A		Lāna'i	-87.8%	56
Daily Census	N/A	-71.1%	729	N/A		Kaua'i	-61.8%	605
Airlift (scheduled seats)	N/A	-81.9%	8,176	N/A		Hawai'i Island	-72.6%	3,899

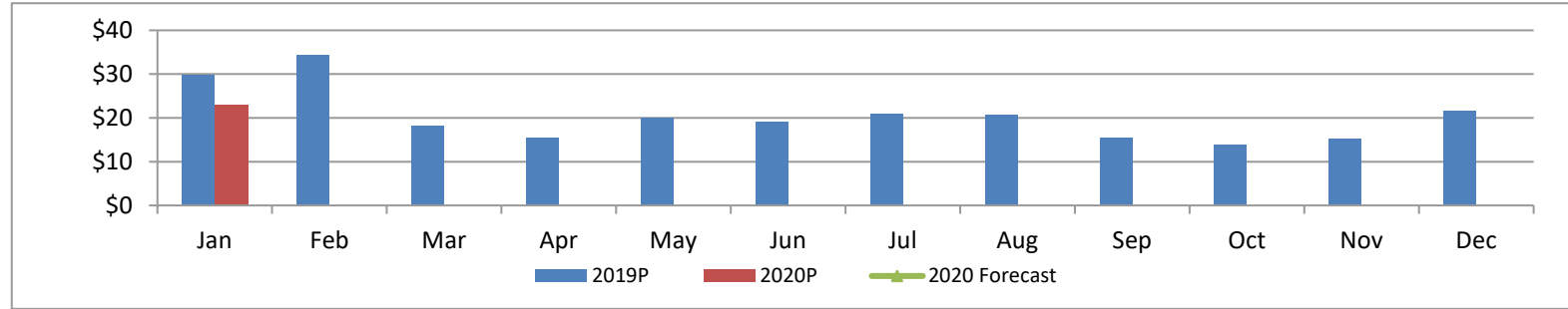
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

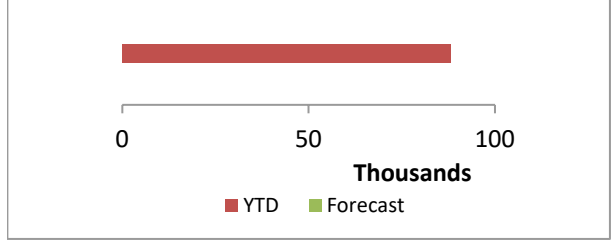


Monthly Visitor Expenditures (\$mil)

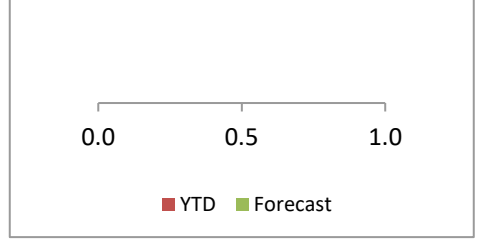


Annual Indicators

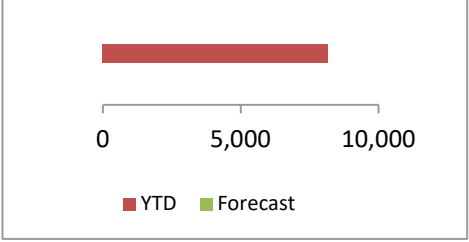
YTD Visitor Days



YTD Daily Spend (\$ per person per day)



YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Apr-20** *Preliminary*

Visitor Industry Performance Measures

Market: **KOREA**

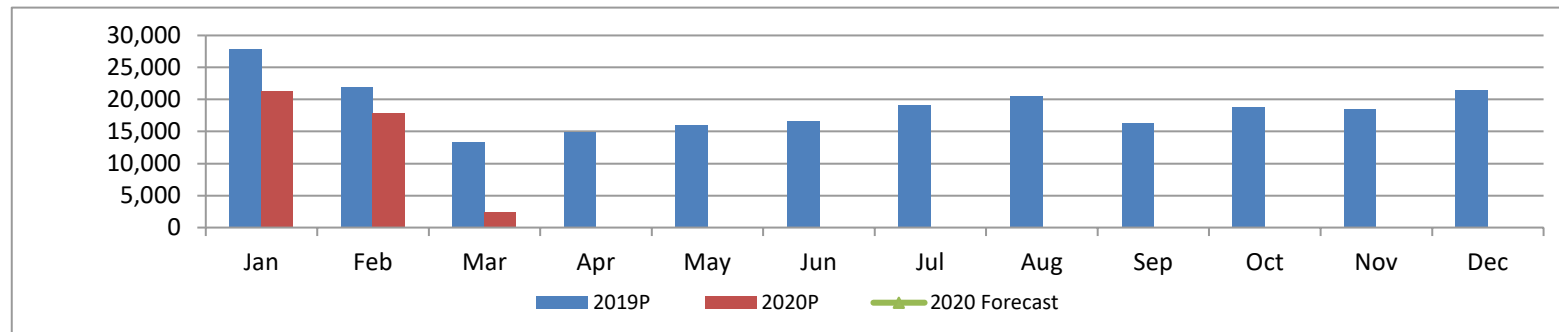
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A		O'ahu	-46.6%	41,052
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A		Maui	-61.1%	4,165
Visitor Days	N/A	-43.6%	348,078	N/A		Moloka'i	-82.0%	60
Arrivals	N/A	-46.7%	41,629	N/A		Lāna'i	-69.8%	94
Daily Census	N/A	-44.1%	2,877	N/A		Kaua'i	-60.0%	1,205
Airlift (scheduled seats)	N/A	-36.0%	71,175	N/A		Hawai'i Island	-41.3%	6,093

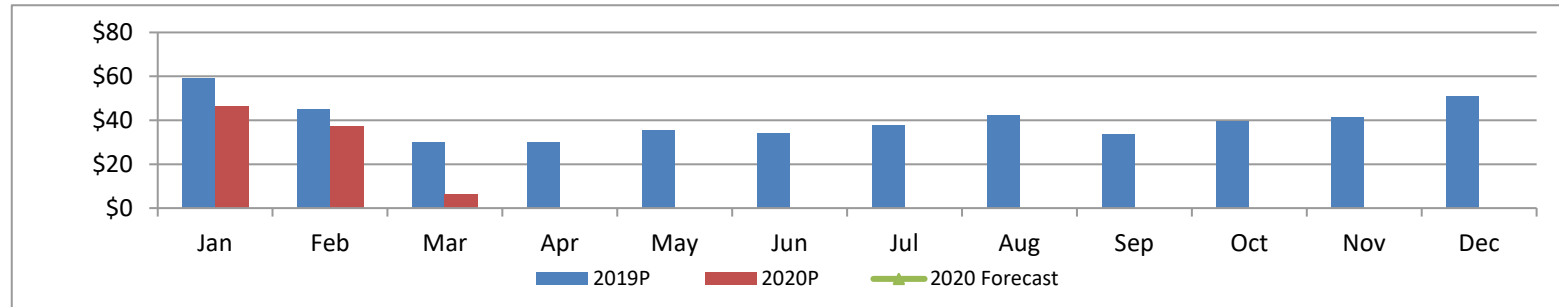
*DBEDT 2020 Forecast not yet available

Monthly Indicators

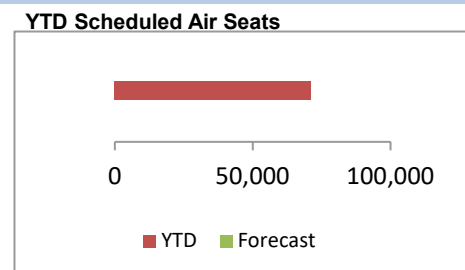
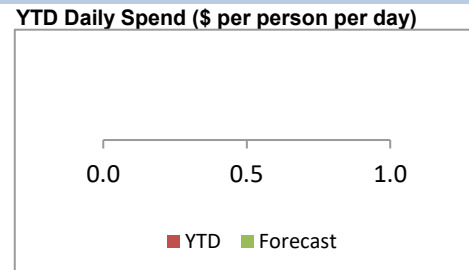
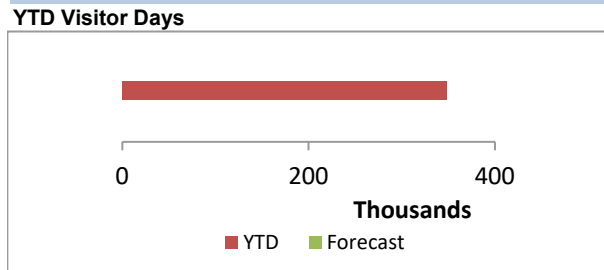
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Apr-20** *Preliminary*

Visitor Industry Performance Measures

Market: **TAIWAN**

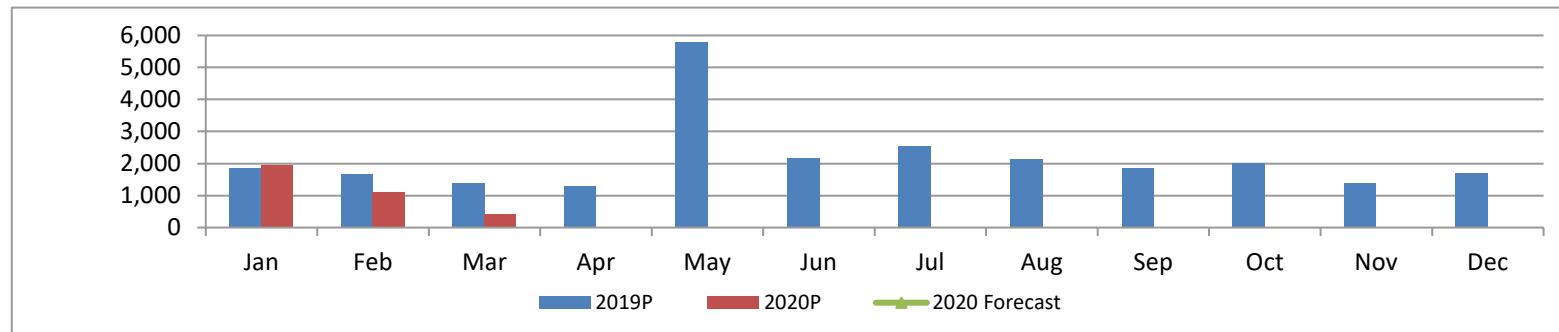
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A		O'ahu	-44.5%	3,367
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A		Mau	-60.0%	601
Visitor Days	N/A	-45.6%	33,198	N/A		Moloka'i	N/A	22
Arrivals	N/A	-44.6%	3,453	N/A		Lāna'i	-92.9%	3
Daily Census	N/A	-46.0%	274	N/A		Kaua'i	-72.7%	132
Airlift (scheduled seats)	N/A	-29.4%	7,344	N/A		Hawai'i Island	-14.0%	1,238

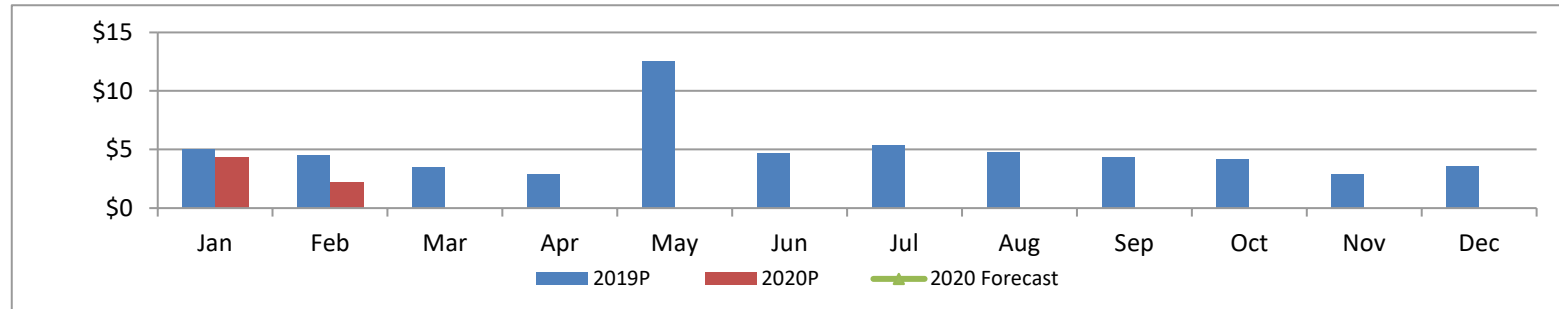
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

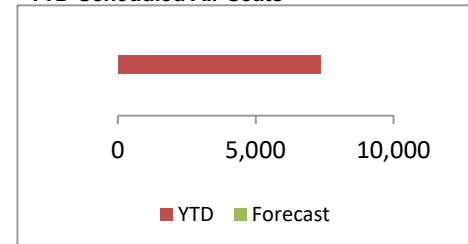
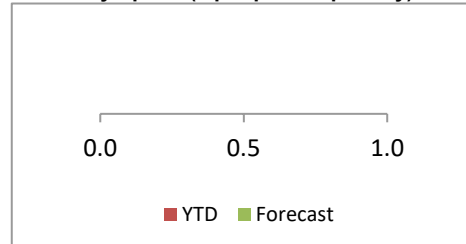
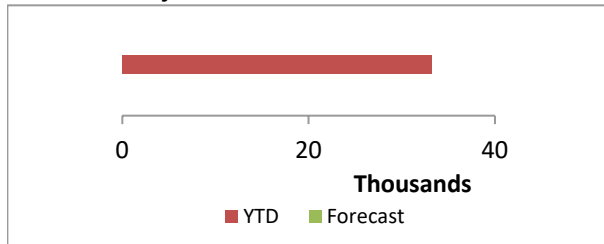


Monthly Visitor Expenditures (\$mil)



Annual Indicators

YTD Visitor Days, YTD Daily Spend (\$ per person per day), YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Apr-20** *Preliminary*

Visitor Industry Performance Measures

Market: **OCEANIA**

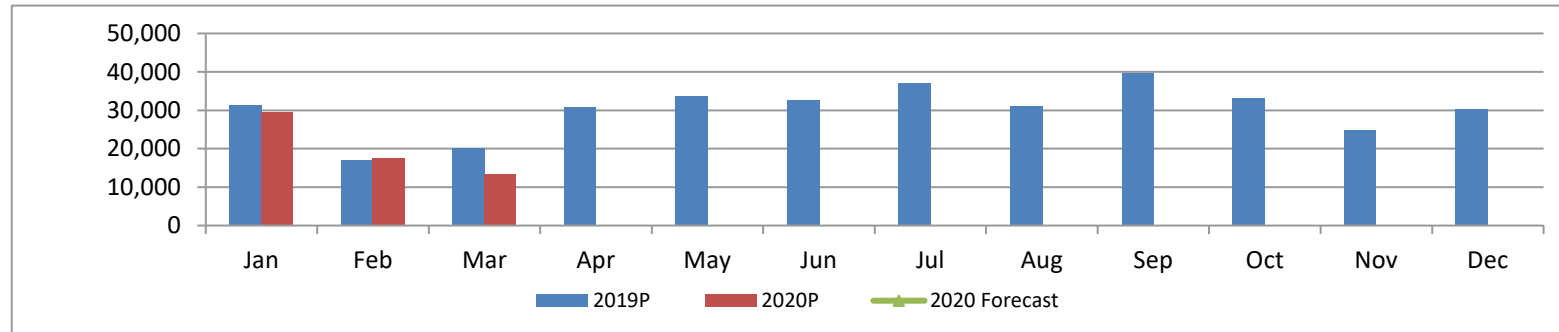
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A		O'ahu	-38.9%	59,489
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A		Maui	-44.4%	8,630
Visitor Days	N/A	-39.0%	566,363	N/A		Moloka'i	-25.5%	830
Arrivals	N/A	-39.0%	60,758	N/A		Lāna'i	-48.4%	845
Daily Census	N/A	-39.5%	4,681	N/A		Kaua'i	-42.5%	5,041
Airlift (scheduled seats)	N/A	-39.7%	95,737	N/A		Hawai'i Island	-31.4%	7,609

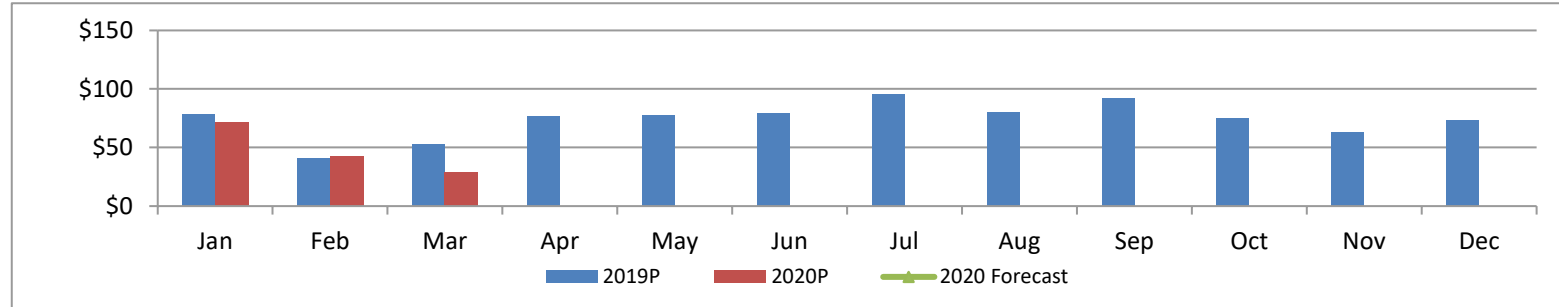
*DBEDT 2020 Forecast not yet available

Monthly Indicators

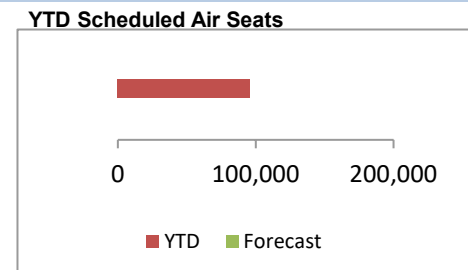
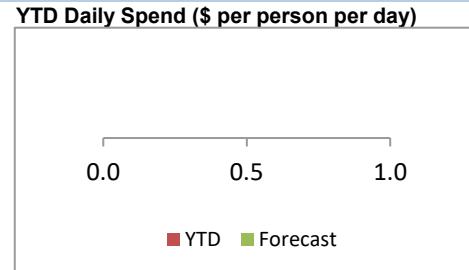
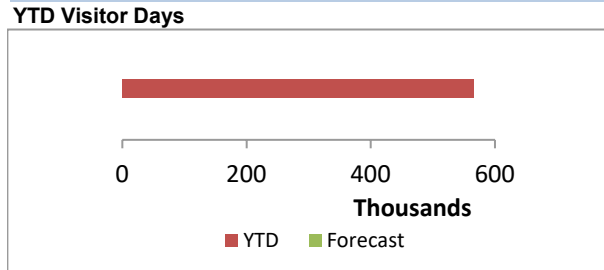
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Apr-20** *Preliminary*

Visitor Industry Performance Measures

Market: **EUROPE**

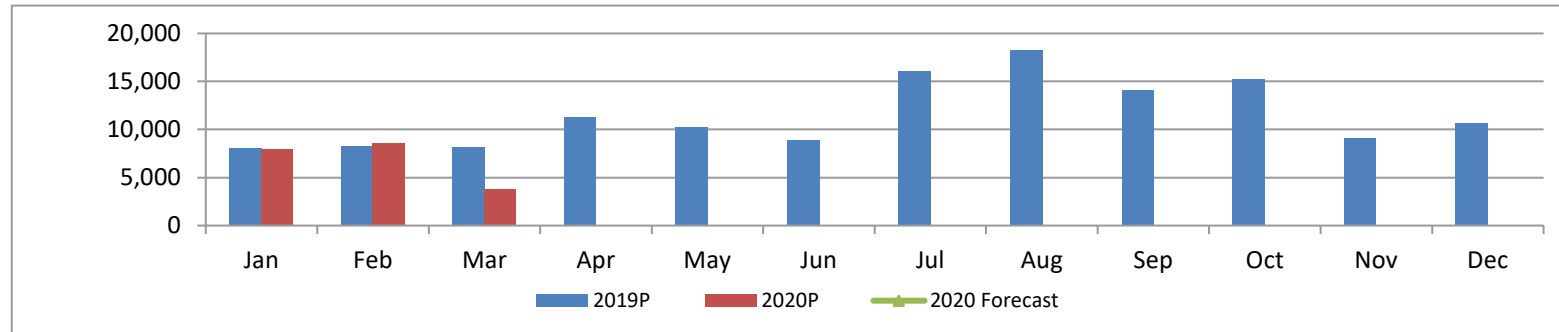
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A		O'ahu	-44.7%	14,726
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A		Mau	-43.9%	8,296
Visitor Days	N/A	-43.1%	268,630	N/A		Moloka'i	-35.5%	359
Arrivals	N/A	-43.1%	20,419	N/A		Lāna'i	-49.1%	241
Daily Census	N/A	-43.6%	2,220	N/A		Kaua'i	-39.8%	4,909
Airlift (scheduled seats)	N/A	N/A	N/A	N/A		Hawai'i Island	-35.4%	6,515

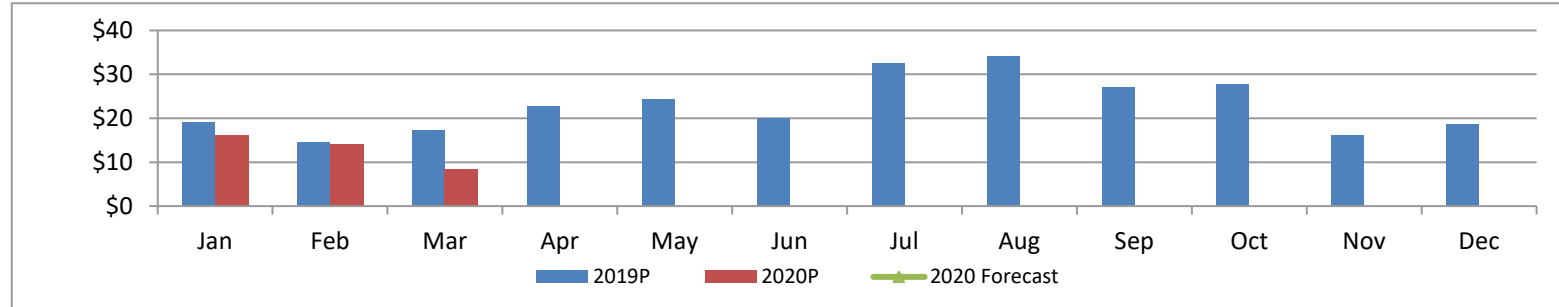
*DBEDT 2020 Forecast not yet available

Monthly Indicators

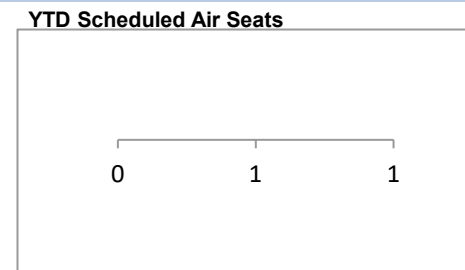
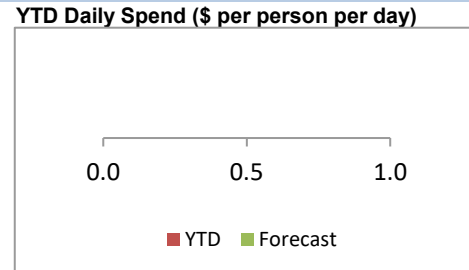
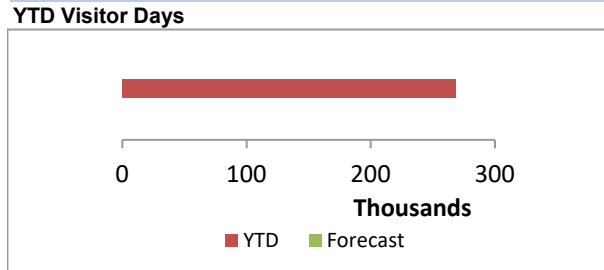
Monthly Arrivals



Monthly Visitor Expenditures (\$mil)



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Apr-20** *Preliminary*

Visitor Industry Performance Measures

Market: **LATIN AMERICA**

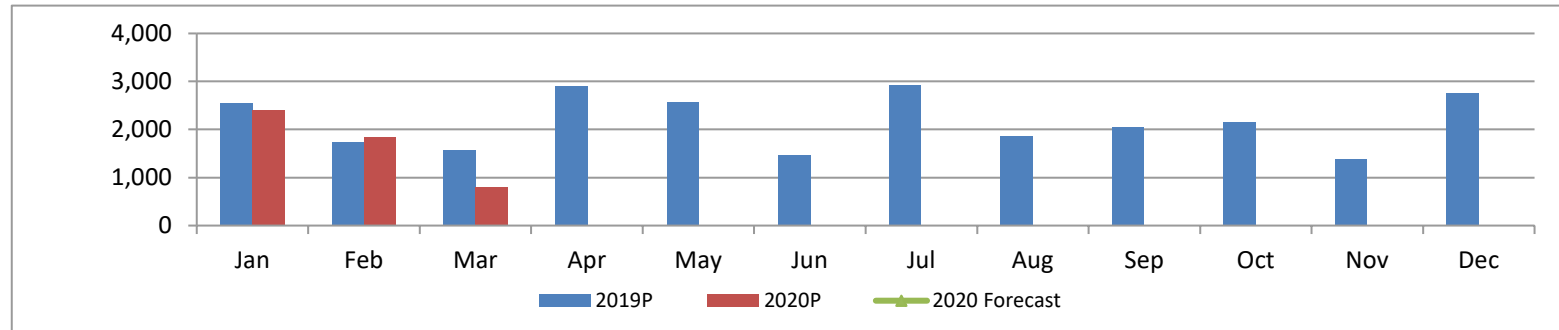
Key Performance Indicators

	% of Forecast*	YOY Rate	YTD	Forecast		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)*	N/A	N/A	N/A	N/A		O'ahu	-43.3%	3,868
Daily Spend (\$pppd)	N/A	N/A	N/A	N/A		Maui	-43.0%	1,711
Visitor Days	N/A	-43.0%	53,330	N/A		Moloka'i	-59.9%	20
Arrivals	N/A	-42.2%	5,062	N/A		Lāna'i	-25.7%	50
Daily Census	N/A	-43.4%	441	N/A		Kaua'i	-42.3%	567
Airlift (scheduled seats)	N/A	N/A	N/A	N/A		Hawai'i Island	-52.4%	752

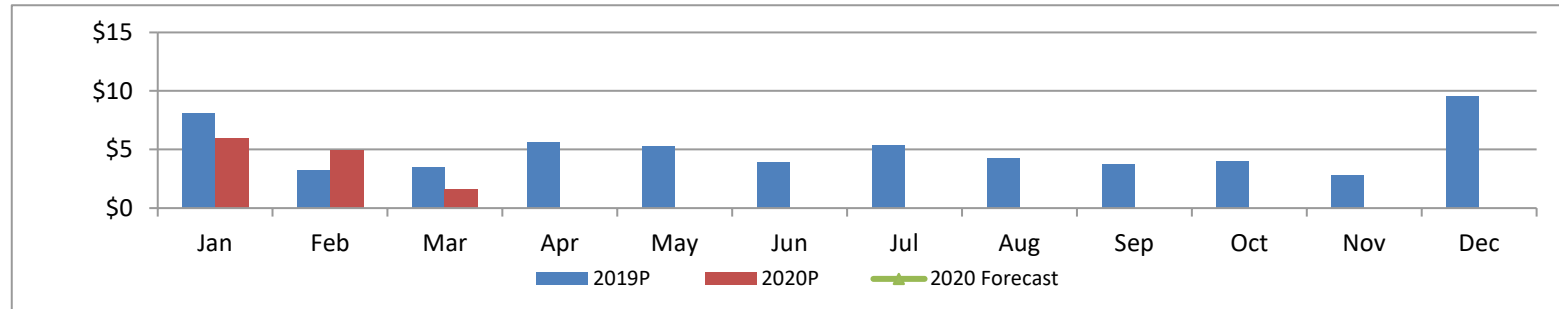
*DBEDT 2020 Forecast not yet available

Monthly Indicators

Monthly Arrivals

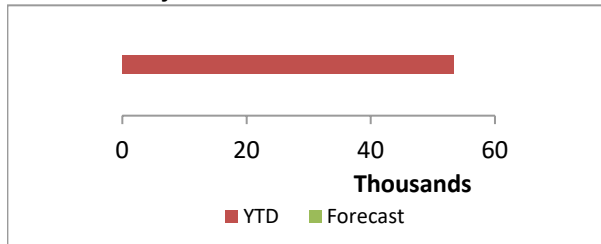


Monthly Visitor Expenditures (\$mil)

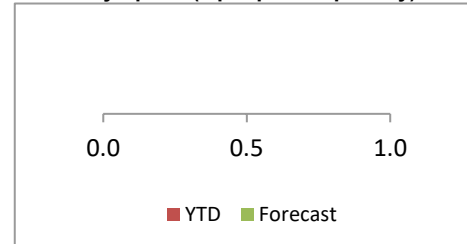


Annual Indicators

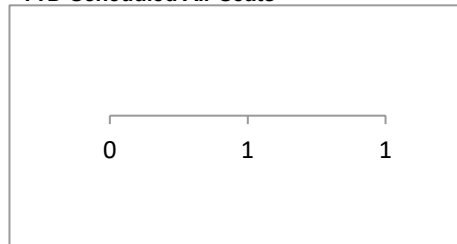
YTD Visitor Days



YTD Daily Spend (\$ per person per day)



YTD Scheduled Air Seats



* Excludes Supplemental Business Expenditures

6

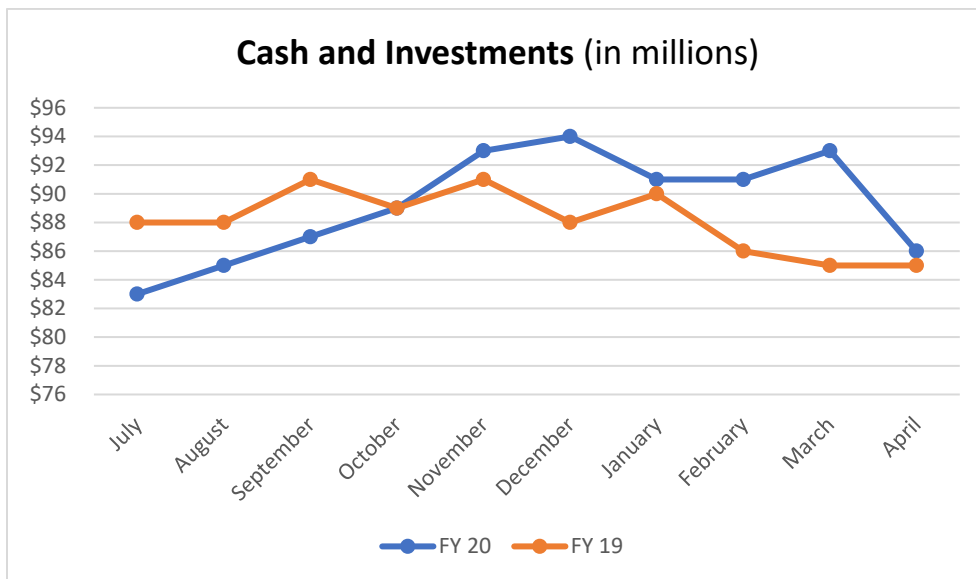
Presentation, Discussion and Action on
HTA's Financial Reports for February,
March, April 2020

HAWAII TOURISM AUTHORITY

Financial Statements – Executive Summary February 1, 2020 – April 30, 2020

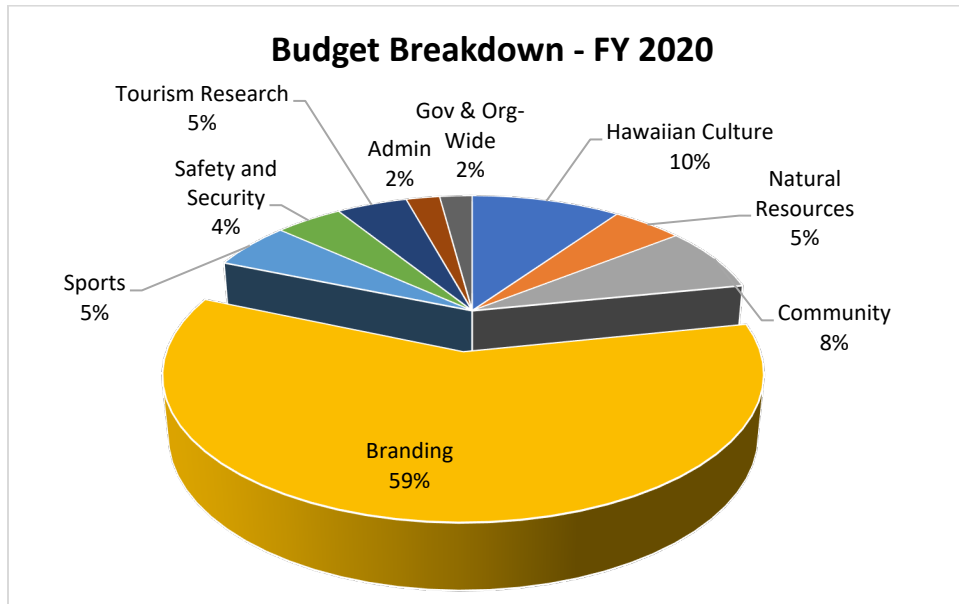
Tourism Special Fund:

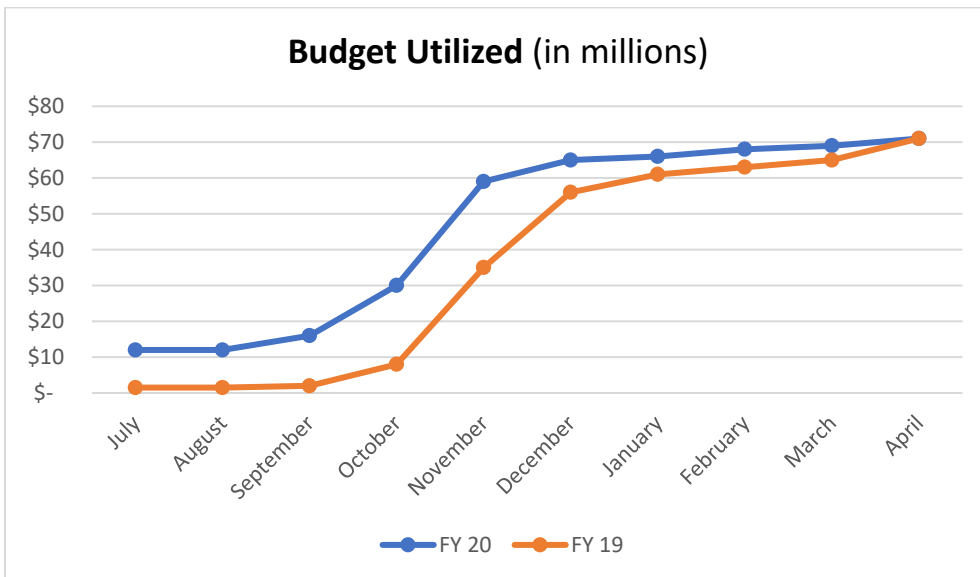
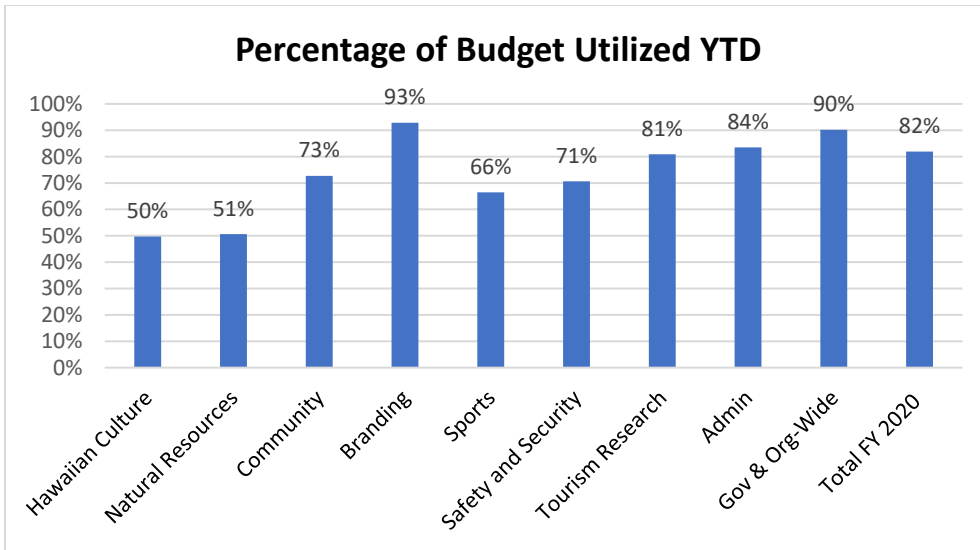
1. \$91.5M in cash and investments



- a. Includes \$5M in Emergency Fund held as investments.
 - b. Increase from January of \$903K due to:
 - i. Recording \$19.7M in TAT revenue and \$108K in contract refunds for the three-month period ended April 2020.
 - ii. This was offset by \$18.9M in expenditures for the three-month period ended April 2020.
2. \$8.7M of prior year encumbrances being spent down.
 3. \$22.3M reserved as Board allocations are projected for June 30, 2020. A supporting schedule is embedded in these financial statements to provide greater detail. This number includes:
 - a. \$5M in Emergency Fund established under statute;
 - b. \$3M allocated by the Board for use during a significant economic downturn;
 - c. \$5.2M in funds held for the Center for Hawaiian Music & Dance. \$6.2M if respective funds from FY2020's budget remains unspent.

- d. \$9M earmarked for specific obligations, such as EUTF, ERS, and accrued vacation.
- 4. \$3.4M of unreserved funds available for the FY 2021 Budget or other emergency purposes.
- 5. \$71.1M of the \$86.8M FY 2020 budget utilized; contract paperwork currently being submitted for this year's expenditures.
 - a. A summary of year-to-date budget reallocations is included in these financial statements.
 - b. Through April 30, 2020 HTA has encumbered \$1.1M for programs supporting HTA's response efforts to COVID-19.





6. The following notable budget reallocations were made:
- a. \$1.7M for Crisis Management to support HTA's COVID-19 response efforts, reallocated from Sports (\$1.5M) and Kahea Airport Greetings (\$200K) programs
 - b. \$170K to Hawaiian Culture Opportunity Fund to support Iolani Palace repairs (\$67K) and CNHA's online makeke (\$100K)
 - c. \$365K to Olelo Hawaii program to support programs with Aha Punana Leo
 - d. \$1M for Center for Hawaiian Music & Dance, for purposes of separately tracking the unspent funds

- e. \$54K to Community Program Opportunity Fund, primarily related to \$38K for the COVID Aware Challenge project with DOE and Class of 2020 Seniors
 - f. \$864K from CEP and Community Training Workshops back to Community Programs Unallocated
7. Operating Income:
- a. Recorded \$19.7M in TAT for the three-month period ended April 2020, and \$65.8M in TAT YTD. Recorded \$1.3M in investment income YTD.
 - b. Incurred \$19.1M of program and other expenditures for the three-month period ended April 2020, and \$52.0M in expenditures YTD.

Convention Center Enterprise Special Fund:

- 8. \$42.2M in cash
 - a. Increase of \$5.2M from January due to recording \$4.1M in TAT and \$3.0M in HCC operating revenue for the three-month period ended April 2020. This was offset by \$1.9M in HCC expenditures for the three-month period ended April 2020.
- 9. \$22.3M in cash with contractor or with DAGS, for R&M projects (as of April 2020).
 - a. Includes \$2M Emergency
 - b. These funds are encumbered or budgeted toward specific projects such as cooling tower replacement, furnishings and enhancements, wall rehabilitation, boiler replacement, and various equipment purchases and upgrades.
 - c. Reflects \$14.4M spent on current and future projects (in-progress costs or preliminary work); this includes recent costs expended on meeting room roof repairs.
- 10. \$23.6M reserved as Board allocations are projected for June 30, 2020. This includes funds targeted to fund future repair and maintenance projects, large equipment purchases, convention center operating contingencies, operating capital, and convention center incentives. This balance includes the \$1.2M the Board dedicated out of the FY 2020 budget toward increasing the Convention Center Major Repair & Maintenance Reserve.
- 11. \$1.0M of prior year encumbrances being spent down.
- 12. \$24.2M of the \$24.8M FY 2020 budget utilized;
- 13. Operating Income:

- a. Recorded \$4.1M in TAT for the three-month period ended April 2020 and \$13.8M in TAT YTD.
- b. Convention Center operations:
 - i. \$2.1M operating loss YTD per HCC financial statements (as of April 2020).

Hawaii Tourism Authority

Balance Sheet

Tourism Special Fund

As of 4/30/20

	<u>Current Year</u>
Assets	
Current Assets	
Checking	86,544,902.06
Petty Cash	5,000.00
Total Current Assets	<u>86,549,902.06</u>
Total Assets	<u><u>86,549,902.06</u></u>
Fund Balance	
Current year payables	
Accounts Payable	267,827.00
Credit Card Payable	58,998.65
Total Current year payables	<u>326,825.65</u>
Encumbered Funds	
FY 2013 Funds	15,212.64
FY 2014 Funds	6,101.00
FY 2015 Funds	136,496.00
FY 2016 Funds	380,991.84
FY 2017 Funds	1,109,914.50
FY 2018 Funds	1,230,721.61
FY 2019 Funds	5,851,071.64
FY 2020 Funds	52,476,801.81
Total Encumbered Funds	<u>61,207,311.04</u>
Unencumbered Funds	
Total Unencumbered Funds	25,015,765.37
Total Fund Balance	<u><u>86,549,902.06</u></u>

Hawaii Tourism Authority
Balance Sheet
Convention Center Enterprise Special Fund
As of 4/30/20

	<u>Current Year</u>
Assets	
Current Assets	
Checking	42,261,147.22
Total Current Assets	<u>42,261,147.22</u>
Total Assets	<u><u>42,261,147.22</u></u>
Fund Balance	
Encumbered Funds	
FY 2018 Funds	295,003.00
FY 2019 Funds	747,866.26
FY 2020 Funds	<u>22,259,899.00</u>
Total Encumbered Funds	<u>23,302,768.26</u>
Unencumbered Funds	
Total Unencumbered Funds	18,958,378.96
Total Fund Balance	<u><u>42,261,147.22</u></u>

Hawaii Tourism Authority

Balance Sheet

Emergency Trust Fund

As of 4/30/20

	<u>Current Year</u>
Assets	
Current Assets	
Investments	5,116,570.47
Total Current Assets	<u>5,116,570.47</u>
Total Assets	<u><u>5,116,570.47</u></u>
Fund Balance	
Current year net assets	
	75,686.38
Total Current year net assets	<u>75,686.38</u>
Prior years	
Total Prior years	5,040,884.09
Total Fund Balance	<u><u>5,116,570.47</u></u>

HTA Allocations
FY 2019 and FY 2020 (Projected)

HTA Allocations:

<p>Annual Budgets: -\$86.8M FY 2020 HTA Tourism Special Fund (\$79M TAT + \$7.8M carryover) -FY 2020 Convention Center Fund TBD</p>

\$8M Emergency Funds	
\$5M Emergency Fund Reserve (Established by Statute as a separate fund, to be used upon declaration of a tourism emergency by the Governor)	\$3.0M Mandated by Board (to be used in the event of a significant economic downturn upon Board approval)

	Tourism Special Fund Long-Term Obligations, Commitments and Allocations:		Convention Center Fund Long-Term Obligations, Commitments and Obligations:	
	6/30/2019	Projected 6/30/2020	6/30/2019	Projected 6/30/2020
Carryover of FY 2019 to FY 2020 Budget (Use in FY 20)	7,790,788	-	1,512,988	1,512,988
Carryover for FY 2021 Budget	3,424,735	3,424,735	20,117,074	21,317,074
Center for Hawaiian Music & Dance	5,198,568	5,198,568	750,000	750,000
Accrued Health Liability (Based on liability at FY17)	2,430,000	2,430,000		
Accrued Retirement Liability (FY 17)	6,300,000	6,300,000		
Accrued Vacation Liability	383,849	383,849	80,000	80,000
Total Long-Term Obligations and Commitments	<u>25,527,940</u>	<u>17,737,152</u>	<u>22,460,062</u>	<u>23,660,062</u>

Hawaii Tourism Authority
Statement of Revenues and Expenditures
348 - Tourism Special Fund
20 - FY 2020 Funds
From 2/1/2020 Through 4/30/2020

	Total Budget	Current Period Actual	Current Year Actual	Total Budget Variance
Revenue				
Transient Accomodations Tax	79,000,000.00	19,749,999.99	65,833,333.30	(13,166,666.70)
Miscellaneous	0.00	105,606.09	117,298.61	117,298.61
Refunds	0.00	0.00	24,980.45	24,980.45
Transfers - In	0.00	2,062.89	2,062.89	2,062.89
Total Revenue	<u>79,000,000.00</u>	<u>19,857,668.97</u>	<u>65,977,675.25</u>	<u>(13,022,324.75)</u>
Expense				
Perpetuating Hawaiian Culture	8,409,588.00	483,460.49	613,053.87	7,796,534.13
Natural Resources	4,046,950.00	313,500.00	348,500.00	3,698,450.00
Community	6,514,002.00	1,071,352.04	1,187,295.28	5,326,706.72
Branding	51,561,050.00	5,224,181.44	11,214,503.48	40,346,546.52
Sports	4,700,000.00	837,162.04	2,873,212.94	1,826,787.06
Safety and Security	3,850,000.00	479,295.65	691,517.96	3,158,482.04
Tourism Research	3,993,394.00	576,193.02	661,502.02	3,331,891.98
Administrative	1,876,700.00	464,581.98	492,876.36	1,383,823.64
Governance and Organization-Wide	1,824,104.00	563,060.18	596,941.16	1,227,162.84
Total Expense	<u>86,775,788.00</u>	<u>10,012,786.84</u>	<u>18,679,403.07</u>	<u>68,096,384.93</u>
Net Income	<u>(7,775,788.00)</u>	<u>9,844,882.13</u>	<u>47,298,272.18</u>	<u>55,074,060.18</u>

Hawaii Tourism Authority
Statement of Revenues and Expenditures
361 - Convention Center Enterprise Special Fund
20 - FY 2020 Funds
From 2/1/2020 Through 4/30/2020

	<u>Total Budget</u>	<u>Current Period Actual</u>	<u>Current Year Actual</u>	<u>Total Budget Variance</u>
Revenue				
Transient Accomodations Tax	16,500,000.00	4,125,000.00	13,750,000.00	(2,750,000.00)
HCC Revenue	<u>9,541,811.00</u>	<u>3,018,000.15</u>	<u>6,516,511.28</u>	<u>(3,025,299.72)</u>
Total Revenue	<u>26,041,811.00</u>	<u>7,143,000.15</u>	<u>20,266,511.28</u>	<u>(5,775,299.72)</u>
Expense				
Branding	72,100.00	0.00	0.00	72,100.00
Administrative	250,511.00	0.00	0.00	250,511.00
HCC Operating Expense	12,824,694.00	0.00	0.00	12,824,694.00
HCC Repair and Maintenance	4,753,020.00	0.00	0.00	4,753,020.00
HCC Sales and Marketing / MFF	6,414,097.00	1,794,375.00	1,794,375.00	4,619,722.00
Governance and Organization-Wide	527,389.00	166,162.00	166,412.00	360,977.00
Total Expense	<u>24,841,811.00</u>	<u>1,960,537.00</u>	<u>1,960,787.00</u>	<u>22,881,024.00</u>
Net Income	<u>1,200,000.00</u>	<u>5,182,463.15</u>	<u>18,305,724.28</u>	<u>17,105,724.28</u>

Hawaii Tourism Authority
Statement of Revenues and Expenditures
348 - Tourism Special Funds - Prior Year Funds
From 2/1/2020 Through 4/30/2020

	Total Budget	Current Period Actual	Current Year Actual	Total Budget Variance
Revenue				
Interest and Dividends	0.00	0.00	1,300,163.01	1,300,163.01
Total Revenue	<u>0.00</u>	<u>0.00</u>	<u>1,300,163.01</u>	<u>1,300,163.01</u>
Expense				
Perpetuating Hawaiian Culture	3,546,744.58	462,676.67	2,352,455.17	1,194,289.41
Natural Resources	1,196,578.00	58,800.00	271,000.00	925,578.00
Community	2,604,719.50	313,918.30	1,820,318.59	784,400.91
Branding	26,084,684.49	6,270,045.19	22,575,197.81	3,509,486.68
Sports	2,790,463.45	823,400.00	2,391,550.00	398,913.45
Safety and Security	1,341,713.01	199,914.13	1,037,358.23	304,354.78
Tourism Research	3,804,989.32	907,221.29	2,255,702.55	1,549,286.77
Administrative	1,058,266.82	85,494.42	648,928.29	409,338.53
Governance and Organization-Wide	35,144.49	5,912.77	10,165.22	24,979.27
Total Expense	<u>42,463,303.66</u>	<u>9,127,382.77</u>	<u>33,362,675.86</u>	<u>9,100,627.80</u>
Net Income	<u>(42,463,303.66)</u>	<u>(9,127,382.77)</u>	<u>(32,062,512.85)</u>	<u>10,400,790.81</u>

Hawaii Tourism Authority
Statement of Revenues and Expenditures
361 -Convention Center Enterprise Special Fund - Prior Year Funds
From 2/1/2020 Through 4/30/2020

	<u>Total Budget</u>	<u>Current Period Actual</u>	<u>Current Year Actual</u>	<u>Total Budget Variance</u>
Revenue				
Interest and Dividends	0.00	0.00	452,491.51	452,491.51
Total Revenue	<u>0.00</u>	<u>0.00</u>	<u>452,491.51</u>	<u>452,491.51</u>
Expense				
HCC Operating Expense	954,383.40	0.00	0.00	954,383.40
HCC Sales and Marketing / MFF	75,918.83	0.00	0.00	75,918.83
Governance and Organization-Wide	79,300.00	0.00	66,732.97	12,567.03
Total Expense	<u>1,109,602.23</u>	<u>0.00</u>	<u>66,732.97</u>	<u>1,042,869.26</u>
Net Income	<u>(1,109,602.23)</u>	<u>0.00</u>	<u>385,758.54</u>	<u>1,495,360.77</u>

Hawaii Convention Center
Facility
Income Statement
From 4/01/2020 Through 04/30/2020
(In Whole Numbers)

	Current Month Actual	Current Month Budget	Variance	Current Month Prior Year	YTD Actual	YTD Budget	Variance	YTD Prior Year
Direct Event Income								
Rental Income (Net)	0	186,788	(186,788)	299,166	605,956	1,108,038	(502,082)	1,173,276
Service Revenue	0	79,283	(79,283)	112,962	243,045	316,885	(73,840)	474,353
Total Direct Event Income	0	266,071	(266,071)	412,128	849,001	1,424,923	(575,922)	1,647,629
Direct Service Expenses	100,576	212,728	112,152	211,816	519,035	795,215	276,180	802,744
Net Direct Event Income	(100,576)	53,343	(153,919)	200,312	329,966	629,708	(299,742)	844,885
Ancillary Income								
Food and Beverage (Net)	70,265	615,668	(545,403)	750,667	1,085,574	1,960,180	(874,606)	2,189,161
Event Parking (Net)	6,000	68,300	(62,300)	96,968	185,049	409,960	(224,911)	367,283
Electrical Services	0	5,600	(5,600)	5,553	33,001	59,200	(26,199)	91,262
Audio Visual	0	15,420	(15,420)	44,223	43,633	83,240	(39,607)	92,360
Internet Services	0	0	0	0	0	0	0	0
Rigging Services	0	200	(200)	494	22,502	21,400	1,102	39,804
First Aid Commissions	0	0	0	0	0	0	0	0
Total Ancillary Income	76,265	705,188	(628,923)	897,905	1,369,759	2,533,980	(1,164,221)	2,779,871
Total Event Income	(24,311)	758,531	(782,842)	1,098,216	1,699,725	3,163,688	(1,463,963)	3,624,755
Other Operating Income								
Non-Event Parking	262	4,875	(4,613)	6,753	12,853	19,500	(6,647)	20,255
Other Income	1,335	14,759	(13,424)	15,184	35,228	59,036	(23,808)	51,518
Total Other Operating Income	1,597	19,634	(18,037)	21,937	48,081	78,536	(30,455)	71,773
Total Gross Income	(22,715)	778,165	(800,880)	1,120,153	1,747,806	3,242,224	(1,494,418)	3,696,529
Net Salaries & Benefits								
Salaries & Wages	299,646	446,587	146,941	424,527	1,483,960	1,785,513	301,553	1,607,879
Payroll Taxes & Benefits	140,299	128,647	(11,652)	106,835	485,103	514,588	29,485	417,083
Labor Allocations to Events	(87,064)	(61,990)	25,074	(77,950)	(217,793)	(235,175)	(17,382)	(234,111)
Total Net Salaries & Benefits	352,882	513,244	160,362	453,412	1,751,270	2,064,926	313,656	1,790,851
Other Indirect Expenses								
Net Contracted Services	39,755	34,445	(5,310)	14,683	110,722	132,466	21,744	89,059
Operations	754	14,474	13,720	18,207	41,760	60,696	18,936	49,271
Repair & Maintenance	28,944	76,265	47,321	58,306	197,786	305,060	107,274	228,038
Operational Supplies	9,471	63,215	53,744	63,035	144,589	235,064	90,475	216,217
Insurance	9,334	14,422	5,088	15,312	48,533	51,716	3,183	48,837
Utilities	139,761	198,941	59,180	224,233	630,486	739,080	108,594	744,107
Meetings & Conventions	352	1,650	1,298	836	4,844	5,600	756	6,244
Promotions & Communications	8,892	5,175	(3,717)	1,868	23,783	20,700	(3,083)	18,963
General & Administrative	4,921	33,178	28,257	40,917	75,232	111,261	36,029	100,923
Management Fees	18,232	18,233	1	11,000	72,942	72,932	(10)	44,000
Other	2,402	2,800	398	14,376	152,131	11,200	(140,931)	20,836
Total Other Indirect	262,818	462,798	199,980	462,772	1,502,807	1,745,775	242,968	1,566,495
Net Income (Loss) before CIP Funded Expenses	(638,414)	(197,877)	(440,537)	203,969	(1,506,270)	(568,477)	(937,793)	339,183
CIP Funded Expenses	2,202	0	2,202	2,217	150,692	0	150,692	2,268
Net Income (Loss) from Operations	(636,212)	(197,877)	(438,335)	206,186	(1,355,578)	(568,477)	(787,101)	341,451
Fixed Asset Purchases	0	25,000	25,000	0	34,703	100,000	65,297	27,163
Net Income (Loss) After Fixed Asset Purchases	(636,212)	(222,877)	(413,335)	206,186	(1,390,281)	(668,477)	(721,804)	314,288

Hawaii Convention Center
Facility
Income Statement
From 4/1/2020 Through 4/30/2020
(In Whole Numbers)

	Current Month Actual	Current Month Budget	Variance	Current Month Prior Year	YTD Actual	YTD Budget	Variance	YTD Prior Year
Revenues								
Food & Beverage	95,556	1,018,330	(922,774)	1,311,539	1,920,855	3,271,764	(1,350,909)	3,973,092
Facility	7,597	386,785	(379,188)	594,840	1,205,411	2,116,649	(911,238)	2,351,830
Total Revenues	103,153	1,405,115	(1,301,962)	1,906,379	3,126,266	5,388,413	(2,262,147)	6,324,922
Expenses								
Food & Beverage	112,318	585,785	473,467	733,885	1,311,374	2,011,582	700,208	2,403,756
Facility	629,248	1,017,207	387,959	968,525	3,321,162	3,945,308	624,146	3,581,983
Total Expenses	741,566	1,602,992	861,426	1,702,410	4,632,536	5,956,890	1,324,354	5,985,739
Net Income (Loss) before CIP Funded Expenses	(638,414)	(197,877)	(440,537)	203,969	(1,506,270)	(568,477)	(937,793)	339,183
CIP Funded Expenses	2,202	0	2,202	2,217	150,692	0	150,692	2,268
Net Income (Loss) from Operations	(636,212)	(197,877)	(438,335)	206,186	(1,355,578)	(568,477)	(787,101)	341,451
Fixed Asset Purchases	0	25,000	25,000	0	34,703	100,000	65,297	27,163
Net Income (Loss) after Fixed Asset Purchases	(636,212)	(222,877)	(413,335)	206,186	(1,390,281)	(668,477)	(721,804)	314,288

Hawaii Convention Center
Sales and Marketing
Reforecast
From 05/1/2020 Through 12/31/2020
(In Whole Numbers)

	YTD Actual	Projected Next Month to 12/31/20	Reforecast	Budget	Variance	Prior Year Actual
Other Operating Income						
Other Income	241	0	241	0	241	1,303
Total Other Operating Income	<u>241</u>	<u>0</u>	<u>241</u>	<u>0</u>	<u>241</u>	<u>1,303</u>
Total Gross Income	<u>241</u>	<u>0</u>	<u>241</u>	<u>0</u>	<u>241</u>	<u>1,303</u>
Net Salaries & Benefits						
Salaries & Wages	172,528	95,996	268,524	568,500	299,976	1,475,682
Payroll Taxes & Benefits	42,959	44,063	87,022	138,695	51,673	329,318
Total Net Salaries & Benefits	<u>215,487</u>	<u>140,059</u>	<u>355,546</u>	<u>707,195</u>	<u>351,649</u>	<u>1,805,000</u>
Other Indirect Expenses						
Net Contracted Services	0	0	0	0	0	224,859
Repair & Maintenance	20,128	46,072	66,200	66,200	(0)	73,559
Utilities	1,717	3,783	5,500	3,600	(1,900)	7,048
Meetings & Conventions	980	2,219	3,199	7,400	4,201	578,504
Promotions & Communications	10,779	51,116	61,895	183,800	121,905	1,175,298
Marketing Flexibility Fund	0	0	0	0	0	1,166,934
General & Administrative	1,969	8,330	10,299	18,300	8,001	63,236
Management Fees	0	0	0	0	0	106,800
Other	8,377	10,424	18,801	26,000	7,199	50,629
Total Other Indirect Expenses	<u>43,950</u>	<u>121,944</u>	<u>165,894</u>	<u>305,300</u>	<u>139,406</u>	<u>3,446,867</u>
Net Income (Loss) from Operations	<u>(259,197)</u>	<u>(262,003)</u>	<u>(521,200)</u>	<u>(1,012,495)</u>	<u>491,295</u>	<u>(5,250,564)</u>
Fixed Asset Purchases	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Net Income (Loss) After Fixed Asset Purchases	<u>(259,197)</u>	<u>(262,003)</u>	<u>(521,200)</u>	<u>(1,012,495)</u>	<u>491,295</u>	<u>(5,250,564)</u>

Hawaii Convention Center
Sales and Marketing
Income Statement
From 4/1/2020 Through 4/30/2020
(In Whole Numbers)

	Current Month Actual	Current Month Budget	Variance	Current Month Prior Year	YTD Actual	YTD Budget	Variance	YTD Prior Year
Other Operating Income								
Other Income	13	0	13	12	241	0	241	108
Total Other Operating Income	13	0	13	12	241	0	241	108
Total Gross Income	13	0	13	12	241	0	241	108
Net Salaries & Benefits								
Salaries & Wages	33,546	44,175	10,629 A	109,044	172,528	176,700	4,172	475,799
Payroll Taxes & Benefits	15,204	11,295	(3,909)	26,750	42,959	45,180	2,221	108,101
Total Net Salaries & Benefits	48,750	55,470	6,720	135,794	215,487	221,880	6,393	583,899
Other Indirect Expenses								
Net Contracted Services	0	0	0	18,824	0	0	0	68,081
Repair & Maintenance	3,201	5,517	2,316	14,129	20,128	22,068	1,940	27,573
Utilities	475	300	(175)	342	1,717	1,200	(517)	2,127
Meetings & Conventions								
Mileage	0	0	0	187	0	0	0	347
Meals & Entertainment	0	500	500	605	326	2,000	1,674	1,732
Meetings & Conventions	0	0	0	13,400	237	0	(237)	250,943
Dues & Subscriptions	147	117	(30)	725	417	468	52	3,417
Total Meetings & Conventions	147	617	471	14,917	980	2,468	1,488	256,440
Promotions & Communications								
Site Visit	(2,000)	0	2,000	4,526	0	0	0	15,745
Photography	0	0	0	2,452	79	0	(79)	3,577
Advertising	1,047	3,000	1,953	17,562	1,047	12,000	10,953	83,835
Web Development & Maint	2,234	3,725	1,491	12,076	10,918	14,900	3,982	22,025
Market Research	0	0	0	4,800	0	0	0	9,600
Promotional	0	500	500	23,509	(1,264)	4,000	5,264	53,157
Attendance Promotion	0	0	0	(4,309)	0	0	0	11,136
Global Outreach	0	0	0	0	0	0	0	0
Total Promotions & Comm	1,281	7,225	5,944	60,616	10,779	30,900	20,121	199,076
Marketing Flexibility Fund	0	0	0	90,110	0	0	0	260,135
General & Administrative	1,165	1,108	(57)	594	1,969	4,432	2,463	25,589
Management Fees	0	0	0	11,000	0	0	0	44,000
Other	2,094	2,166	72	4,503	8,377	8,664	287	17,068
Total Other Indirect Expenses	8,363	16,933	8,570	215,033	43,950	69,732	25,782	900,089
Net Income (Loss) from Operations	(57,100)	(72,403)	15,303	(350,816)	(259,197)	(291,612)	32,415	(1,483,880)
Fixed Asset Purchases	0	0	0	0	0	0	0	0
Net Income (Loss) After Fixed Asset Purchases	(57,100)	(72,403)	15,303	(350,816)	(259,197)	(291,612)	32,415	(1,483,880)

Budget Reallocation Summary
Through April 30, 2020

Budget Line Item	Program Code	Original Budget	Year-to-Date		February 2020 Activity
			Reallocation	Budget After Reallocations	
Perpetuating Hawaiian Culture					
<i>From:</i>					
Hawaiian Culture Programs - Unallocated	200	7,780,000	(7,779,883)	117	(1,054,883)
State Employees Salaries - Hawaiian Culture	932	285,000	(48,481)	236,519	(12,500)
				-	-
				-	-
				-	-
			(7,828,364)		(1,067,383)
<i>To:</i>					
Kūkulu Ola: Living Hawaiian Cultural Program	201	-	1,585,000	1,585,000	-
Hawaiian Culture Initiative	202	-	500,000	500,000	-
Maemae HTA	203	-	52,831	52,831	(207,169)
Market Support	204	-	24,419	24,419	(275,581)
Aloha Festivals	205	-	250,000	250,000	-
Kahea Harbor Greetings	206	-	250,000	250,000	-
Kahea Airport Greetings	207	-	1,300,000	1,300,000	(200,000)
Hawaiian Music & Dance Center	208	-	1,000,000	1,000,000	1,000,000
King Kamehameha Celebration	210	-	150,000	150,000	-
Prince Lot Hula Festival	211	-	75,000	75,000	-
Merrie Monarch Hula Festival	212	-	100,000	100,000	(50,000)
Prince Kūhiō Celebration	213	-	75,000	75,000	-
Legacy Award Program	214	-	50,000	50,000	50,000
Hawaiian Culture Opportunity Fund	215	-	406,960	406,960	166,960
‘ōlelo Hawai‘i	216	-	865,173	865,173	365,173
FestPac	217	-	500,000	500,000	-
Duke's OceanFest	373	-	50,000	50,000	-
Surfing	374	-	150,000	150,000	-
Mele Mei & Na Hōkū Music Festival	713	-	150,000	150,000	-
Canoe Paddling	715	-	130,000	130,000	-
May Day	716	-	90,500	90,500	5,500
Resort Area Hawaiian Cultural Initiative	718	-	325,000	325,000	-
In-House Contracted Staff - Hawaiian Culture	299	-	77,569	77,569	20,000
			8,157,452		874,883
Natural Resources					
<i>From:</i>					
Natural Resources Programs - Unallocated	400	3,980,000	(3,980,000)	-	-
				-	-
				-	-
			(3,980,000)		-
<i>To:</i>					
Aloha ‘āina	402	-	2,081,000	2,081,000	-
Environmental Sustainability Fund	406	-	1,649,000	1,649,000	-
Hawai‘i EcoTourism Association	407	-	50,000	50,000	-
Natural Resources Opportunity Fund	415	-	200,000	200,000	-
				-	-
				-	-
				-	-
			3,980,000		-

Budget Reallocation Summary
Through April 30, 2020

Budget Line Item	Program Code	Original Budget	Reallocation	Budget After Reallocations	February 2020 Activity
Community					
<i>From:</i>					
Community Programs - Unallocated	705	5,789,252	(4,782,500)	1,006,752	760,700
State Employees Salaries - Community	933	210,000	(23,750)	186,250	-
			(4,806,250)		760,700
<i>To:</i>					
Community Event Awareness	353	-	260,000	260,000	-
Community Program Opportunity Fund	700	-	204,000	204,000	54,000
Community Enrichment Program	701	-	3,064,000	3,064,000	(500,200)
Community Training Workshops	702	-	390,000	390,000	(364,000)
World War II Commemorative Event	720	-	500,000	500,000	-
Current Workforce Development	802	-	174,500	174,500	49,500
Future Workforce Development	803	-	175,000	175,000	-
Scholarship Program	805	-	500,000	500,000	-
In-House Contracted Staff - Community	728	-	38,000	38,000	-
			5,305,500		(760,700)
Branding					
<i>From:</i>					
Marketing Opportunity Fund	380	2,000,000	(25,000)	1,975,000	(525,000)
				-	-
				-	-
			(25,000)		(525,000)
<i>To:</i>					
China MMA	329	2,000,000	-	2,000,000	500,000
Memberships and Dues - Branding	397	100,000	25,000	125,000	25,000
				-	-
				-	-
			25,000		525,000

Budget Reallocation Summary
Through April 30, 2020

Budget Line Item	Program Code	Original Budget	Reallocation	Budget After Reallocations	February 2020 Activity
Sports					
<i>From:</i>					
Sports Programs - Unallocated	379	7,200,000	(6,423,364)	776,636	(2,292,000)
				-	-
				-	-
			(6,423,364)		(2,292,000)
<i>To:</i>					
PGA Tour Contracts	312	-	2,206,364	2,206,364	-
Team Unlimited - Xterra Championship	341	-	132,000	132,000	42,000
LPGA	343	-	250,000	250,000	250,000
Soccer	347	-	-	-	-
Tennis	370	-	425,000	425,000	-
Volleyball	371	-	500,000	500,000	500,000
Polynesian Football Hall of Fame	377	-	155,000	155,000	-
UH Athletics Branding Partnership	378	-	100,000	100,000	-
Sports Community Outreach	382	-	30,000	30,000	-
Surf Marketing	383	-	100,000	100,000	-
Football	384	-	25,000	25,000	-
			3,923,364		792,000
Safety and Security					
<i>From:</i>					
				-	-
				-	-
				-	-
			-		-
<i>To:</i>					
Crisis Management	602	100,000	1,700,000	1,800,000	1,700,000
				-	-
				-	-
				-	-
			1,700,000		1,700,000
Tourism Research					
<i>From:</i>					
None				-	-
				-	-
				-	-
			-		-

Budget Reallocation Summary
Through April 30, 2020

Budget Line Item	Program Code	Original Budget	Reallocation	Budget After Reallocations	February 2020 Activity
To:					
				-	-
				-	-
				-	-
			-		-
<hr/>					
Administration and Organizationwide Costs					
From:					
				-	-
				-	-
				-	-
			-		-
<hr/>					
To:					
Community Industry Outreach & PR Services	101	250,000	15,000	265,000	-
				-	-
				-	-
			15,000		-
<hr/>					
Governance and Organization-Wide					
From:					
State Employees Fringe	931	1,481,142	(43,338)	1,437,804	(7,500)
				-	-
				-	-
			(43,338)		(7,500)
<hr/>					
To:					
				-	-
				-	-
				-	-
			-		-
<hr/>					
Board Allocations					
From:					
None				-	-
					-
			-		-
<hr/>					

Hawaii Tourism Authority
 Budget Statement - Summary
 FY 2020
 As of April 30, 2020

Category	Tourism Special Fund				Convention Center Enterprise Special Fund			
	Fiscal Year 2020				Fiscal Year 2020			
	Budget	YTD Amount of Budget Used	Balance	Activity for February-April 2020	Budget	YTD Amount of Budget Used	Balance	Activity for February-April 2020
Revenues								
TAT Revenue Allocation	79,000,000	65,833,333	13,166,667	19,750,000	16,500,000	13,750,000	2,750,000	4,125,000
Prior Year Carryover	7,790,788	-	7,790,788	-	-	-	-	-
Other	-	1,444,505	(1,444,505)	107,669	-	452,492	(452,492)	-
	<u>86,790,788</u>	<u>67,277,838</u>	<u>19,512,950</u>	<u>19,857,669</u>	<u>16,500,000</u>	<u>14,202,492</u>	<u>2,297,508</u>	<u>4,125,000</u>
Expenditures								
Perpetuating Hawaiian Culture								
Hawaiian Culture Programs	8,095,500	3,909,221	4,186,279	1,977,425	-	-	-	-
In-House Contracted Staff - Hawaiian Culture	77,569	56,721	20,848	22,600	-	-	-	-
State Employee Salaries - Hawaiian Culture	236,519	213,872	22,647	(26,625)	-	-	-	-
Subtotal	<u>8,409,588</u>	<u>4,179,814</u>	<u>4,229,774</u>	<u>1,973,400</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Natural Resources (Statute: \$1M minimum)								
Natural Resources Programs	3,980,000	1,981,000	1,999,000	(100,000)	-	-	-	-
In-House Contracted Staff - Natural Resources	-	-	-	-	-	-	-	-
State Employee Salaries - Natural Resources	66,950	66,950	-	-	-	-	-	-
Subtotal	<u>4,046,950</u>	<u>2,047,950</u>	<u>1,999,000</u>	<u>(100,000)</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Community								
Community Programs	6,289,752	4,524,031	1,765,721	1,182,383	-	-	-	-
In-House Contracted Staff - Community	38,000	37,058	942	6,000	-	-	-	-
State Employee Salaries - Community	186,250	174,722	11,528	(3,750)	-	-	-	-
Subtotal	<u>6,514,002</u>	<u>4,735,811</u>	<u>1,778,191</u>	<u>1,184,633</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Branding								
Branding Programs	51,022,000	47,335,286	3,686,714	(938,654)	-	-	-	-
In-House Contracted Staff - Branding	-	-	-	-	-	-	-	-
State Employee Salaries - Branding	539,050	526,589	12,461	-	72,100	72,100	-	-
Subtotal	<u>51,561,050</u>	<u>47,861,875</u>	<u>3,699,175</u>	<u>(938,654)</u>	<u>72,100</u>	<u>72,100</u>	<u>-</u>	<u>-</u>
Sports								
Sports Programs	4,700,000	3,123,971	1,576,029	192,607	-	-	-	-
Subtotal	<u>4,700,000</u>	<u>3,123,971</u>	<u>1,576,029</u>	<u>192,607</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Safety and Security (Statute: 0.5% minimum = \$395,000)								
Safety and Security Programs	3,850,000	2,720,098	1,129,902	1,864,378	-	-	-	-
Subtotal	<u>3,850,000</u>	<u>2,720,098</u>	<u>1,129,902</u>	<u>1,864,378</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Tourism Research								
Tourism Research Programs	3,600,394	2,837,699	762,695	657,799	-	-	-	-
In-House Contracted Staff - Tourism Research	-	-	-	-	-	-	-	-
State Employee Salaries - Tourism Research	393,000	392,322	678	-	-	-	-	-
Subtotal	<u>3,993,394</u>	<u>3,230,021</u>	<u>763,373</u>	<u>657,799</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Hawai'i Convention Center								
Sales & Marketing	-	-	-	-	6,414,097	6,414,097	-	513,671
Operations	-	-	-	-	3,282,883	5,821,299	(2,538,416)	3,182,735
Major Repair & Maintenance	-	-	-	-	4,753,020	4,753,020	-	4,753,020
Subtotal	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>14,450,000</u>	<u>16,988,416</u>	<u>(2,538,416)</u>	<u>8,449,426</u>
Administrative (Statute: Cannot exceed 3.5% = \$2,765,000)								
Operations	816,700	529,788	286,912	145,950	-	-	-	-
In-House Contracted Staff - Admin	-	-	-	-	-	-	-	-
State Employee Salaries - Admin	1,075,000	1,047,630	27,370	-	250,511	250,511	-	-
Subtotal	<u>1,891,700</u>	<u>1,577,418</u>	<u>314,282</u>	<u>145,950</u>	<u>250,511</u>	<u>250,511</u>	<u>-</u>	<u>-</u>
Organizationwide Costs								
State Employee Fringe	1,437,804	1,437,803	1	(18,225)	187,389	187,386	3	-
Organization-Wide	240,000	105,000	135,000	-	340,000	205,762	134,238	13,750
Governance - Board/Others	146,300	102,475	43,825	19,318	-	-	-	-
Subtotal	<u>1,824,104</u>	<u>1,645,278</u>	<u>178,826</u>	<u>1,093</u>	<u>527,389</u>	<u>393,148</u>	<u>134,241</u>	<u>13,750</u>
Total Expenditures	<u>86,790,788</u>	<u>71,122,236</u>	<u>15,668,552</u>	<u>4,981,206</u>	<u>15,300,000</u>	<u>17,704,175</u>	<u>(2,404,175)</u>	<u>8,463,176</u>
Revenues vs Expenditures	<u>-</u>	<u>(3,844,398)</u>			<u>1,200,000</u>	<u>(3,501,683)</u>		
Administrative Cap (3.5%)	2,765,000	2,765,000						
Administrative Costs (AG Definition)	<u>1,891,700</u>	<u>1,577,418</u>	2.0%					
	873,300	1,187,582						

Hawaii Tourism Authority
Budget Statement
FY 2020 - As of April 30, 2020

Program Code	Program Title	Budget - FY20	YTD Encumbered (Budget Used)	Budget Remaining	February-April 2020 Activity
Perpetuating Hawaiian Culture					
200	Hawaiian Culture Programs - Unallocated	117.00	116.24	0.76	0.00
201	Kukulu Ola: Living Hawaiian Cultural Prog	1,585,000.00	1,423,179.14	161,820.86	(140,000.00)
202	Hawaiian Culture Initiative	500,000.00	976.44	499,023.56	657.48
203	Ma'ema'e HTA	52,831.00	13,166.43	39,664.57	0.00
204	Market Support	24,419.00	24,418.45	0.55	2,572.72
205	Aloha Festivals	250,000.00	230,000.00	20,000.00	230,000.00
206	Kahea Program - Harbor Greetings	250,000.00	139,290.00	110,710.00	138,254.00
207	Kahea Program - Airport Greetings	1,300,000.00	42,851.00	1,257,149.00	42,851.00
208	Hawaiian Music and Dance Center	1,000,000.00	0.00	1,000,000.00	0.00
210	King Kamehameha Celebration	150,000.00	150,000.00	0.00	90,000.00
211	Prince Lot Hula Festival	75,000.00	75,000.00	0.00	0.00
212	Merrie Monarch Hula Festival	100,000.00	100,000.00	0.00	100,000.00
213	Prince Kuhio Celebration	75,000.00	75,000.00	0.00	75,000.00
214	Legacy Award Program	50,000.00	0.00	50,000.00	0.00
215	Hawaiian Culture Opportunity Fund	406,960.00	406,959.57	0.43	360,000.00
216	Olelo Hawaii	865,173.00	665,175.00	199,998.00	665,175.00
217	FESTPAC	500,000.00	0.00	500,000.00	0.00
297	Memberships and Dues - Hawaiian Culture	500.00	345.00	155.00	0.00
298	Travel - Hawaiian Culture	15,000.00	12,943.69	2,056.31	3,114.76
299	In-House Contracted Staff - Hawaiian Culture	77,569.00	56,721.21	20,847.79	22,600.00
373	Duke's OceanFest	50,000.00	50,000.00	0.00	50,000.00
374	Surfing	150,000.00	0.00	150,000.00	0.00
713	Mele Mei & Na Hoku Music Festival (formerly May I	150,000.00	50,000.00	100,000.00	0.00
715	Canoe Regatta	130,000.00	130,000.00	0.00	40,000.00
716	May Day	90,500.00	50,000.00	40,500.00	50,000.00
718	Resort Area Hawaiian Cultural Initiative	325,000.00	269,800.00	55,200.00	269,800.00
932	Salaries - Hawaiian Culture	236,519.00	213,872.00	22,647.00	(26,625.00)
Subtotal	Perpetuating Hawaiian Culture	8,409,588.00	4,179,814.17	4,229,773.83	1,973,399.96
Natural Resources					
400	Natural Resources Programs - Unallocated	0.00	0.00	0.00	0.00
402	Aloha Aina (formerly NR and Leg Prov NR)	2,081,000.00	1,981,000.00	100,000.00	(100,000.00)
406	Visitor Impact Program	1,649,000.00	0.00	1,649,000.00	0.00
407	Hawaii Eco Tourism Association	50,000.00	0.00	50,000.00	0.00
415	Natural Resources Opportunity Fund	200,000.00	0.00	200,000.00	0.00
936	State Employee Salaries - Natural Resources	66,950.00	66,950.00	0.00	0.00
Subtotal	Natural Resources	4,046,950.00	2,047,950.00	1,999,000.00	(100,000.00)
Community					
353	Community Event Awareness (formerly SMMH)	260,000.00	0.00	260,000.00	0.00
700	Community Opportunity	204,000.00	166,000.00	38,000.00	166,000.00
701	Community Enrichment Program	3,064,000.00	2,906,680.29	157,319.71	(58,950.00)
702	Community Training Workshops (formerly Capacity)	390,000.00	344,882.08	45,117.92	286,368.00
705	Community Programs - Unallocated	1,006,752.00	0.00	1,006,752.00	0.00
720	World War II Commemorative Event	500,000.00	500,000.00	0.00	500,000.00
728	In-House Contracted Staff - Community (formerly Pi	38,000.00	37,058.00	942.00	6,000.00
797	Memberships and Dues - Community	500.00	245.00	255.00	245.00
798	Travel - Community	15,000.00	9,161.99	5,838.01	670.03
802	Current Workforce Development (Industry Career E	174,500.00	0.00	174,500.00	(125,000.00)
803	Future Workforce Development (LEI)	175,000.00	105,561.48	69,438.52	1,550.00
805	Scholarship Program	500,000.00	491,500.00	8,500.00	411,500.00
933	State Employee Salaries - Community	186,250.00	174,722.00	11,528.00	(3,750.00)
Subtotal	Community	6,514,002.00	4,735,810.84	1,778,191.16	1,184,633.03
Branding					
4	Cruise Infrastructure Improvements and Arrival Exp	250,000.00	75,545.03	174,454.97	0.00
102	Hawai'i Tourism Summit	300,000.00	2,256.54	297,743.46	0.00
306	Island-Based International Marketing	800,000.00	800,000.00	0.00	0.00
316	MICE Asia (formerly MCI Global - Management)	350,000.00	350,000.00	0.00	0.00
318	gohawaii.com (formerly Online Website Coordinati	350,000.00	300,000.00	50,000.00	0.00
320	Island Chapters Staffing and Admin	3,170,000.00	3,170,000.00	0.00	0.00
321	US (formerly North America)	22,525,000.00	22,525,000.00	0.00	0.00
322	Canada	800,000.00	800,000.00	0.00	0.00
323	Japan	10,000,000.00	10,000,000.00	0.00	0.00
324	Korea	1,400,000.00	1,400,000.00	0.00	0.00
325	Oceania	1,900,000.00	1,900,000.00	0.00	0.00
326	Europe	400,000.00	400,000.00	0.00	0.00
329	China	2,000,000.00	1,000,000.00	1,000,000.00	(1,000,000.00)
330	Taiwan	500,000.00	500,000.00	0.00	0.00
331	Meetings, Convention & Incentives	2,300,000.00	2,300,000.00	0.00	0.00
336	Southeast Asia	500,000.00	500,000.00	0.00	0.00
339	Global Digital Marketing Strategy (former Intl Onlin	500,000.00	380,500.00	119,500.00	0.00
350	Global Mkt Shared Resces (formerly Intellect Prop E	797,000.00	787,000.00	10,000.00	0.00
380	Marketing Opportunity Fund	1,975,000.00	8,820.46	1,966,179.54	0.00
397	Memberships and Dues - Branding	125,000.00	121,562.00	3,438.00	58,750.00
398	Travel - Branding	50,000.00	14,602.21	35,397.79	2,596.43
723	Hawaii Film Office Partnership	30,000.00	0.00	30,000.00	0.00

Hawaii Tourism Authority
Budget Statement
FY 2020 - As of April 30, 2020

Program Code	Program Title	Budget - FY20	YTD		February-April 2020 Activity
			Encumbered (Budget Used)	Budget Remaining	
934	State Employee Salaries - Branding	539,050.00	526,589.00	12,461.00	0.00
Subtotal	Branding	51,561,050.00	47,861,875.24	3,699,174.76	(938,653.57)
Sports					
312	PGA Tour Contracts	2,206,364.00	2,206,364.00	0.00	0.00
341	TEAM Unlimited - Xterra/Xduro	132,000.00	90,000.00	42,000.00	0.00
343	LPGA	250,000.00	0.00	250,000.00	0.00
347	Soccer	0.00	0.00	0.00	0.00
370	Tennis	425,000.00	425,000.00	0.00	200,000.00
371	Volleyball	500,000.00	0.00	500,000.00	0.00
377	Polynesian Football HoF	155,000.00	155,000.00	0.00	0.00
378	UH Athletics Branding Partnership	100,000.00	100,000.00	0.00	0.00
379	Sports Programs - Unallocated	776,636.00	0.00	776,636.00	0.00
382	Sports Community Outreach	30,000.00	22,607.04	7,392.96	(7,392.96)
383	Surf Marketing	100,000.00	100,000.00	0.00	0.00
384	Football	25,000.00	25,000.00	0.00	0.00
Subtotal	Sports	4,700,000.00	3,123,971.04	1,576,028.96	192,607.04
Safety and Security					
601	Visitor Assistance Programs	650,000.00	650,000.00	0.00	650,000.00
602	Crisis Management	1,800,000.00	1,094,077.58	705,922.42	1,088,743.53
603	Lifeguard Program	700,000.00	575,000.00	125,000.00	125,000.00
604	Preventative Programs	400,000.00	394,386.12	5,613.88	0.00
606	Safety and Security Opportunity Fund	300,000.00	6,634.32	293,365.68	634.32
Subtotal	Safety and Security	3,850,000.00	2,720,098.02	1,129,901.98	1,864,377.85
Tourism Research					
501	Data Dissemination	54,000.00	4,000.00	50,000.00	4,000.00
505	Est of Visitor Arrivals by Country by Month	6,000.00	2,950.00	3,050.00	2,950.00
506	Infrastructure Research (Accomodations and Airsea	556,330.00	360,151.66	196,178.34	95,651.66
512	Visitor Arrivals and Departure Surveys	1,314,540.00	1,123,770.46	190,769.54	72,233.36
513	Evaluation and Performance Studies	1,148,405.00	1,128,823.50	19,581.50	334,691.00
514	Marketing Research	498,797.00	196,276.20	302,520.80	135,300.00
597	Memberships and Dues - Research	7,322.00	7,012.84	309.16	3,524.46
598	Travel - Research	15,000.00	14,714.59	285.41	9,448.03
935	State Employee Salaries - Research	393,000.00	392,322.00	678.00	0.00
Subtotal	Tourism Research	3,993,394.00	3,230,021.25	763,372.75	657,798.51
Administrative					
101	Community-Industry Outreach & Public Relations S\	265,000.00	187,146.16	77,853.84	13,976.82
103	hawaiitourismauthority.org (formerly HTA web/Glo	100,000.00	38,026.35	61,973.65	2.71
901	General and Administrative	386,700.00	284,904.05	101,795.95	128,883.64
909	Protocol Fund	0.00	0.00	0.00	0.00
930	State Employee Salaries - Admin	1,075,000.00	1,047,630.00	27,370.00	0.00
998	Travel - Admin	50,000.00	19,711.77	30,288.23	3,086.47
Subtotal	Administrative	1,876,700.00	1,577,418.33	299,281.67	145,949.64
Governance and Organization-Wide					
915	Organization-Wide	240,000.00	105,000.00	135,000.00	0.00
919	Governance - Gen Board/Others	146,300.00	102,475.03	43,824.97	19,318.06
931	State Employees Fringe	1,437,804.00	1,437,803.00	1.00	(18,225.00)
Subtotal	Governance and Organization-Wide	1,824,104.00	1,645,278.03	178,825.97	1,093.06
Total	FY 2020 Funds	86,775,788.00	71,122,236.92	15,653,551.08	4,981,205.52
Convention Center Enterprise Special Fund					
934	State Employee Salaries - Branding	72,100.00	72,100.00	0.00	0.00
Subtotal	Branding	72,100.00	72,100.00	0.00	0.00
930	State Employee Salaries - Admin	250,511.00	250,511.00	0.00	0.00
Subtotal	Administrative	250,511.00	250,511.00	0.00	0.00
850	HCC Operating Expense	12,824,694.00	12,337,810.00	486,884.00	6,200,735.00
850	HCC Operating Expense	12,824,694.00	12,337,810.00	486,884.00	6,200,735.00
860	HCC Repair and Maintenance	4,753,020.00	4,753,020.00	0.00	4,753,020.00
860	HCC Repair and Maintenance	4,753,020.00	4,753,020.00	0.00	4,753,020.00
870	HCC Sales and Marketing / MFF	6,414,097.00	6,414,097.00	0.00	513,671.00
870	HCC Sales and Marketing / MFF	6,414,097.00	6,414,097.00	0.00	513,671.00
915	Organization-Wide	340,000.00	205,762.00	134,238.00	13,750.00
931	State Employees Fringe	187,389.00	187,386.00	3.00	0.00
Subtotal	Governance and Organization-Wide	527,389.00	393,148.00	134,241.00	13,750.00
Total	Total 20 - FY 2020 Funds	24,841,811.00	24,220,686.00	621,125.00	11,481,176.00

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Review of the Proposed Budget for the Hawai'i Tourism Authority for Fiscal Year 2021

Hawaii Tourism Authority
Tourism Special Fund
FY 2021 Budget

Program Code	Program Title	FY 2021 Budget		Original FY 2020 Budget	
Perpetuating Hawaiian Culture					
200	Hawaiian Culture Programs - Unallocated	-		6,780,000	
201	Kukulu Ola: Living Hawaiian Cultural Prog	3,059,781		-	
202	Hawaiian Culture Initiative	950,000		-	
203	Ma'ema'e HTA	15,000		-	
204	Market Support	20,000		-	
208	Hawaiian Music and Dance Center	-		1,000,000	
297	Memberships and Dues - Hawaiian Culture	300		500	
298	Travel - Hawaiian Culture	-		15,000	
932	Salaries - Hawaiian Culture	217,140		285,000	
Subtotal	Perpetuating Hawaiian Culture	4,262,221	7.7%	8,080,500	9.3%
(decr due to CHMD)					
Natural Resources					
400	Natural Resources Programs - Unallocated	-		3,980,000	
402	Aloha Aina (formerly NR and Leg Prov NR)	2,453,735		-	
406	Visitor Impact Program	205,667		-	
936	State Employee Salaries - Natural Resources	-		66,950	
Subtotal	Natural Resources	2,659,402	4.8%	4,046,950	4.7%
Community					
TBD	Community-Based Tourism - Oahu	925,000		-	
TBD	Community-Based Tourism - Maui County	925,000		-	
TBD	Community-Based Tourism - Hawaii Island	925,000		-	
TBD	Community-Based Tourism - Kauai	925,000		-	
705	Community Programs - Unallocated	-		5,789,252	
797	Memberships and Dues - Community	500		500	
798	Travel - Community	25,000		15,000	
933	State Employee Salaries - Community	147,120		210,000	
Subtotal	Community	3,872,620	7.0%	6,014,752	6.9%
Branding					
4	Cruise Infrastructure Improvements and Arrival Experience	50,000		250,000	
102	Hawai'i Tourism Summit	-		300,000	
306	Island-Based International Marketing	-		800,000	
316	MICE Asia (formerly MCI Global - Management)	-		350,000	
318	gohawaii.com (formerly Online Website Coordination)	300,000		350,000	
320	Island Chapters Staffing and Admin	2,400,000		3,170,000	
321	US (formerly North America)	17,685,707		22,525,000	
322	Canada	373,820		800,000	
323	Japan	5,000,000		10,000,000	
324	Korea	400,000		1,400,000	
325	Oceania	500,000		1,900,000	
326	Europe	-		400,000	
329	China	-		2,000,000	
330	Taiwan	-		500,000	
331	Meetings, Convention & Incentives	-		2,300,000	
336	Southeast Asia	-		500,000	
339	Global Digital Marketing Strategy (former Intl Online Strat)	380,500		500,000	
350	Global Mkt Shared Resces (formerly Intellect Prop Data Bank)	787,000		797,000	
380	Marketing Opportunity Fund	-		2,000,000	
397	Memberships and Dues - Branding (US Travel Membership)	125,000		100,000	
398	Travel - Branding	50,000		50,000	
723	Hawaii Film Office Partnership	30,000		30,000	
934	State Employee Salaries - Branding	508,648		539,050	
Subtotal	Branding	28,590,675	51.7%	51,561,050	59.4%
Sports					
312	PGA Tour Contracts	2,166,864		-	
342	Maui Jim - Maui Invitational	50,000		-	
345	ESPN Hawaii Bowl / Diamond Head Classic	475,000		-	
377	Polynesian Football HoF	155,000		-	
378	UH Athletics Branding Partnership	316,000		-	
379	Sports Programs - Unallocated	-		7,200,000	
384	Football (Hula Bowl)	25,000		-	
Subtotal	Sports	3,187,864	5.8%	7,200,000	8.3%
Safety and Security					
601	Visitor Assistance Programs	650,000		650,000	
602	Crisis Management	850,000		100,000	
603	Lifeguard Program	-		700,000	
604	Preventative Programs	-		400,000	
606	Safety and Security Opportunity Fund	-		300,000	
Subtotal	Safety and Security	1,500,000	2.7%	2,150,000	2.5%
Tourism Research					
501	Data Dissemination	-		54,000	
505	Est of Visitor Arrivals by Country by Month	3,500		6,000	
506	Infrastructure Research (Accomodations and Airseats)	520,879		556,330	
512	Visitor Arrivals and Departure Surveys	1,150,581		1,314,540	
513	Evaluation and Performance Studies	662,810		1,148,405	
514	Marketing Research	77,850		498,797	
597	Memberships and Dues - Research	7,322		7,322	
598	Travel - Research	-		15,000	
935	State Employee Salaries - Research	384,180		393,000	
Subtotal	Tourism Research	2,807,122	5.1%	3,993,394	4.6%
Administrative					
101	Community-Industry Outreach & Public Relations Svcs	265,000		250,000	
103	hawaiitourismauthority.org (formerly HTA web/Global Social)	100,000		100,000	
901	General and Administrative	303,700		401,700	
930	State Employee Salaries - Admin	1,047,227		1,075,000	
998	Travel - Admin	10,000		50,000	
Subtotal	Administrative	1,725,927	3.1%	1,876,700	2.2%
Governance and Organization-Wide					
915	Organization-Wide	195,000		240,000	
919	Governance - Gen Board/Others	89,600		146,300	
931	State Employees Fringe	1,367,590		1,481,142	
Subtotal	Governance and Organization-Wide	1,652,190	3.0%	1,867,442	2.2%
Tourism Emergency Fund					
TBD	Tourism Emergency	5,000,000		-	
Subtotal	Tourism Emergency Fund	5,000,000	9.0%	-	0.0%
Total		55,258,021	100.0%	86,790,788	100.0%

9

Resolution 2020-1-3 Regarding the
Visitor Industry, COVID-19



Hawai'i Convention Center
1801 Kalākaua Avenue, Honolulu, Hawai'i 96815
kelepona tel 808 973 2255
kelepa'i fax 808 973 2253
kahua pa'a web hawaii-tourismauthority.org

David Y. Ige
Governor

Chris Tatum
President and Chief Executive Officer

Resolution

No. 2020-1-3

DETERMINING THAT THE OCCURRENCE OF AN OUTBREAK OF DISEASE IS ADVERSELY AFFECTING HAWAII'S TOURISM INDUSTRY BY RESULTING IN SUBSTANTIAL INTERRUPTION IN THE COMMERCE OF THE STATE AND ADVERSELY AFFECTING THE WELFARE OF ITS PEOPLE

WHEREAS, the Hawai'i Revised Statutes (HRS) Section 201B-9, subsection (a), allows the board of the Hawai'i Tourism Authority (Authority) to engage the Governor and request that the Governor declare that a tourism emergency exists due to the occurrence of a world conflict, terrorist threat, national or global economic crisis, natural disaster, outbreak of disease, or other catastrophic event which adversely affects Hawai'i's tourism industry by resulting in a substantial interruption in the commerce of the State and adversely affecting the welfare of its people; and,

WHEREAS, the board believes that, due to COVID-19, a clear and irrefutable tourism emergency exists and that such tourism emergency meets the requirements as established in HRS 201B-9; and,

WHEREAS, according to HRS Section 201B-9, the board shall submit a request to the Governor to declare that a tourism emergency exists; and,

WHEREAS, in accordance with HRS Section 201B-9, subsection (b), upon declaration by the Governor that a tourism emergency exists, the Authority shall develop and implement measures to respond to the tourism emergency; and,

WHEREAS, the board requests that, upon the Governor declaring a tourism emergency, the President & CEO of the Authority shall develop and implement measures to respond to the tourism emergency; and,

WHEREAS, in accordance with HRS Section 201B-10, upon the declaration of a tourism emergency by the Governor, the board recognizes that funds from the tourism emergency special fund will become available and shall be used to provide exclusively for the development and implementation of emergency measures to respond to the tourism emergency; and

WHEREAS, the board authorizes the President & CEO of the Authority to utilize the funds from the tourism emergency special fund to carry out actions, activities, and programs that are in support of the overall mission to address the tourism emergency;

NOW THEREFORE:

BE IT RESOLVED by the Board of Directors of the Hawai'i Tourism Authority; that, the board of directors believes that, in accordance with HRS 201B-9 and 201B-10, a tourism emergency exists here in the State of Hawai'i; and,

2. BE IT FURTHER RESOLVED, that the board, through its Chair, shall submit to Governor David Ige, a written determination that a tourism emergency exists and shall request that, upon approval of the Governor, that the Hawai'i Tourism Authority be granted access to the tourism emergency special fund as provided for in HRS Section 201B-10; and,

3. BE IT FURTHER RESOLVED, that the board hereby authorizes the President & CEO to take actions to carry out the requirements as set forth in HRS 201B-9 and HRS 201B-10, including the transferring and expenditure of funds from the tourism emergency special fund and the subsequent usage of such funds for the purpose of addressing the tourism emergency; and,

4. BE IT FURTHER RESOLVED, that the board hereby requires that the President & CEO report, on a monthly basis, to the board, any and all expenditures of funds from the tourism emergency special fund. The report shall include the amount, vendor, purpose, and status of the expenditure; and,

5. BE IT FURTHER RESOLVED, that certified copies of this resolution be transmitted to the Governor, Senate President, Speaker of the House, Senate Tourism Chair, House Tourism Chair, President & CEO, Board Chair, and Chief Administrative Officer.

CHAIR:

VICE-CHAIR:

MEMBERS:

APPROVED AS TO FORM AND LEGALITY:

GREGG J. KINKLEY
Deputy Attorney General
State of Hawai'i

10

Resolution 2020-1-4 that Temporarily
Suspends Section 6 and Section 7 of
the Aforementioned Policy for a Period
of 90 days from the Date of the Approval
of the Resolution by the Board



Hawai'i Convention Center
1801 Kalākāua Avenue, Honolulu, Hawai'i 96815
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David Y. Ige
Governor

Chris Tatum
President and Chief Executive Officer

Resolution

No. 2020-1-4

AUTHORIZING THE TEMPORARY SUSPENSION OF BOARD POLICIES AND PROCEDURES DUE TO THE COVID-19 PANDEMIC CRISIS IMPACTING THE STATE OF HAWAII.

WHEREAS, the State of Hawaii is currently dealing with the significant and devastating impacts of the COVID-19 pandemic crisis; and,

WHEREAS, on March 4, 2020, Governor David Ige issued an emergency proclamation that allows the State to work quickly and efficiently to prevent, contain, and mitigate the spread of the novel coronavirus or COVID-19, and to provide disaster relief if necessary; and,

WHEREAS, on March 16, 2020, Governor David Ige issued a supplemental emergency proclamation adding provisions to protect the health and safety of the people of Hawaii; and,

WHEREAS, on March 21, 2020, Governor David Ige issued a second supplemental emergency proclamation ordering all individuals, both residents and visitors, arriving or returning to the State of Hawaii to a mandatory 14-day self-quarantine; and,

WHEREAS, on March 23, 2020, Governor David Ige issued a third supplemental emergency proclamation ordering the entire State to stay at home and work from home starting at 12:01 a.m. Wednesday, March 25 through April 30, 2020; and,

WHEREAS, on March 31, 2020, Governor David Ige issued a fourth supplemental emergency proclamation ordering all residents and visitors traveling between any of the islands in the State of Hawai'i to self-quarantine for 14 days; and,

WHEREAS, on April 17, 2020, Governor David Ige issued a fifth supplemental emergency proclamation ordering limitations on activities outside homes or places of residence and closing all beaches in Hawaii; and,

WHEREAS, on April 25, 2020, Governor David Ige issued a sixth supplemental emergency proclamation ordering the extension of the stay-at-home order across the State through May 31, 2020; and,

WHEREAS, given the current COVID-19 crisis and the issuance of numerous emergency proclamations since March 4, 2020, Governor Ige has suspended sections of the Hawaii Revised Statutes, allowing agencies and departments the flexibility to respond quickly and efficiently; and,

WHEREAS, the Hawaii Tourism Authority has policies and procedures that should be suspended to be in alignment with Governor Ige's suspension of certain statutes in order to allow the Hawaii Tourism Authority the ability to respond with similar flexibility and efficiency to support the State's efforts.

NOW, THEREFORE,

1. BE IT RESOLVED by the Board of Directors of the Hawai'i Tourism Authority:, that the board of directors believes that it is in the best interest of the State to suspend the following policies and procedures while the COVID-19 pandemic continues to impact the State:

- Policy #400-01 Procurement Policy (attached)
- Policy #400-50 Operating Budget Policy (attached)
- Procedure #400-50.02 Operating Budget Amendment Procedure (attached)
- Procedure #400-50.01 Development and Approval of Operating Budget Procedure (attached)

2. BE IT FURTHER RESOLVED, that the board hereby authorizes the President & CEO to take any and all actions to properly support the efforts of the State of Hawaii in dealing with the COVID-19 pandemic crisis; and

3. BE IT FURTHER RESOLVED, that the board hereby requires that the President & CEO report, on a monthly basis, to the board, any and all reallocation of funds from one category to another category within the operating budget of the Authority. The report shall include the amount, categories, and purpose of the expenditure; and

5. BE IT FURTHER RESOLVED, that certified copies of this resolution be transmitted to the Governor, Senate President, Speaker of the House, Senate Tourism Chair, House Tourism Chair, President & CEO, Board Chair, and Chief Administrative Officer.

CHAIR:

VICE-CHAIR:

MEMBERS:

APPROVED AS TO FORM AND LEGALITY:

GREGG J. KINKLEY
Deputy Attorney General
State of Hawai'i