



# China Fact Sheet

## China Overview

The Hawai'i Tourism Authority selected TRAVLOCAL LIMITED for Brand Marketing and Management Services in China. The China market continues to lead in per person per day spending among all major source markets for Hawai'i. In 2024, Hawai'i Tourism China (HTC) will continue to focus on digital and social media marketing and leverage partnerships in travel trade events and roadshows across China to elevate Hawai'i's image and brand awareness and promote responsible and mindful travel.

## Year-to-Date February 2024 Quick Facts<sup>1</sup>

Visitor Expenditures:	\$6.9 million
Primary Purpose of Stay:	Pleasure (2,040) vs. MCI (135)
Average Length of Stay:	7.44 days
First Time Visitors:	60.2%
Repeat Visitors:	39.8%

CHINA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	39.6	33.2	NA	6.86	4.54	51.3%
Visitor Days	737,950	151,110	70,468	116,043	96,496	NA	17,079	12,719	34.3%
Arrivals	92,082	15,878	6,686	13,771	12,679	NA	2,297	1,585	44.9%
Average Daily Census	2,022	413	193	318	264	NA	285	216	32.0%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	341.3	343.6	NA	401.7	356.6	12.6%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,876.2	2,615.0	NA	2,987.3	2,862.2	4.4%
Length of Stay (days)	8.01	9.52	10.54	8.43	7.61	NA	7.44	8.03	-7.3%

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2024 forecasts were not available.

## Contact Information

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<sup>1</sup> 2023 and 2024 visitor data are preliminary. 2019 – 2022 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

## Market Summary

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- In the first two months of 2024, 2,297 visitors arrived from China and visitor spending was \$6.9 million. There were 1,585 visitors in the first two months of 2023 and visitor spending was \$4.5 million. In the first two months of pre-pandemic 2019, 22,548 visitors arrived from this market and visitor spending was \$65.8 million.
- In 2023, there were 12,679 visitors from China, compared to 13,771 visitors (-7.9%) in 2022. There were 92,082 visitors in 2019.
- Visitors from China spent \$33.2 million in 2023, compared to \$39.6 million in 2022 and \$242.8 million in 2019. Daily visitor spending in 2023 was \$344 per person, higher than 2022 (\$341 per person) and 2019 (\$329 per person).
- There have been no direct flights from China to Hawai'i since service ended in early February 2020. There were only 28 scheduled flights with 8,176 seats from Shanghai China in 2020, compared to 419 flights with 116,539 seats in 2019 with service to Shanghai (90,812 seats), Beijing (24,941) and Hangzhou (786).

## Market Conditions

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- February 2024 month-end (ME) rate for Chinese Yuan (CNY) versus USD was 7.10, unchanged from January 2024.
- In February 2024, the Purchasing Manager Index (PMI) of China's manufacturing industry was 49.1 percent, a decrease of 10 basis points from the prior month figure of 49.2 percent.
- China's trade surplus in the first two months of 2024, increased to US\$125.16B compared to US\$116.9B in the same period last year. This was an increase of 7.1 percent, as exports rose more than imports.
- The China Tourism Academy estimates that outbound visits exceeded 87 million in 2023, a two-fold increase compared with the previous year. The figure is more than half of that in 2019. The number is projected to jump to 130 million by the end of 2024.
- Data from Ant Group shows a robust rebound of consumer spending during the first back-to-normal Chinese New Year (CNY) travel season after the Covid-19 pandemic, especially in cross-border tourism. The number of transactions made by Alipay users overseas surpassed that of 2019 by 7 percent while consumer spending recovered to 82 percent of the 2019 level, or 2.4 times of 2023.
- Chinese tourists are eagerly planning their upcoming trips for the May Day holidays, summer vacation and even National Day holidays in October 2024, with bookings for outbound trips already picking up steam, according to online travel agencies. The number of users who have shown an early interest in travel for the upcoming May Day holidays is up more than 50 percent compared with 2023, according to data from Tongcheng Travel.
- The number of round-trip passenger flights between China and U.S. will increase to 100 from March 31, following announcements from U.S. regulators and Civil Aviation Administration of China (CAAC). U.S. and Chinese carriers will be able to each fly 50 weekly round trips between the two countries, up from the current weekly round trip amount of 70.

## Distribution by Island

CHINA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
O'ahu	88,596	15,167	5,526	11,711	10,892	2,021	1,327	52.2%
Maui County	19,743	4,000	1,400	3,023	1,744	265	299	-11.3%
Maui	19,387	3,925	1,349	2,889	1,629	233	287	-19.1%
Moloka'i	718	107	20	86	60	14	1	1160.1%
Lāna'i	847	79	62	157	102	30	10	199.5%
Kaua'i	3,781	1,004	438	911	891	151	106	42.6%
Hawai'i Island	34,445	6,412	1,980	4,148	3,537	685	498	37.7%

## Group vs. True Independent; Leisure vs. Business

CHINA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	16,198	NA	222	773	819	163	144	12.7%
True Independent (Net)	45,857	NA	5,289	10,078	9,030	1,587	1,068	48.6%
Leisure vs Business								
Pleasure (Net)	80,528	14,405	6,276	12,745	11,081	2,040	1,382	47.5%
MCI (Net)	7,246	684	69	488	788	135	111	21.6%
Convention/Conf.	3,544	392	23	317	514	105	68	54.3%
Corp. Meetings	1,158	131	14	41	72	12	18	-31.3%
Incentive	2,693	162	40	154	211	20	30	-34.0%

## First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
First Time Visitors (%)	77.7	NA	65.7	63.7	62.2	60.2	67.8	-7.6
Repeat Visitors (%)	22.3	NA	34.3	36.3	37.8	39.8	32.2	7.6

## Tax Revenue

CHINA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	4.59	3.85	0.80	0.53	51.3%

\*State government tax revenue generated (direct, indirect, and induced)