



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 2022, Hawai'i Tourism China (HTC) focuses on market education with Mālama Hawai'i messaging. An integrated digital marketing strategy is deployed to elevate Hawai'i's image and brand awareness by using Chinese consumer preferred social and digital media platforms highlighting Hawai'i's culture, natural resources, community and regenerative tourism.

Year-to-date November 2022 Quick Facts¹

Visitor Expenditures:	\$26.7 million
Primary Purpose of Stay:	Pleasure (8,307) vs. MCI (406)
Average Length of Stay:	8.48 days
First Time Visitors:	65.4%
Repeat Visitors:	34.6%

CHINA (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	NA	26.7	15.3	74.5%
Visitor Days	737,950	151,110	70,468	NA	77,529	47,992	61.5%
Arrivals	92,082	15,878	6,686	NA	9,143	4,346	110.4%
Average Daily Census	2,022	413	193	NA	232	144	61.5%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	NA	344.0	318.5	8.0%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	NA	2,917.2	3,517.0	-17.1%
Length of Stay (days)	8.01	9.52	10.54	NA	8.48	11.04	-23.2%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 forecasts were not available at the time of report publication.

Contact Information

Hawai'i Tourism Authority: Jadie Goo
 Sr. Brand Manager
 Tel: (808) 973-2252
jadie@gohta.net

Hawai'i Tourism China: Dennis Suo
 Chief Executive Officer
 Tel: (808) 683-6088
dennis.suo@htchina.net.cn

¹ 2022 visitor data are preliminary. 2021, 2020 and 2019 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

Prior to the COVID-19 pandemic, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or have a negative COVID pre-travel test. The Safe Travels program ended on March 26, 2022. In November 2022, there were no travel restrictions for passengers arriving to Hawai'i on domestic direct flights from the U.S. Mainland, or for passengers arriving on direct international flights.

- Through the first 11 months of 2022, there were 9,143 visitors from China compared to 85,102 visitors (-89.3%) in the first 11 months of 2019.
- There have been no direct flights from China to Hawai'i since service ended in early February 2020. There were 392 flights with 108,655 seats in the first 11 months of 2019.
- For all of 2021, 6,686 visitors arrived from China. In comparison, there were 15,878 visitors (-57.9%) from China in 2020, and 92,082 visitors (-92.7%) in 2019.
- There were 28 scheduled flights and 8,176 seats from Shanghai China in 2020, compared to 419 flights and 116,539 seats in 2019 with service to Shanghai (90,812 seats), Beijing (24,941) and Hangzhou (786).

Market Conditions

- As of November 11, 2022 China has the following updates regarding travel restrictions: Quarantine policy for travelers is now 5+3 (five days hotel quarantine with three-day self-quarantine), a reduction of two days. Circuit breaker penalty for airlines with infected passengers has been abolished. One negative nucleic acid test within 48 hours before boarding (previously, two tests were required).
- November 2022 month-end (ME) rate for Chinese Yuan (CNY) vs. USD was 7.18, versus October 2022 ME rate of 7.17, versus November 2021 ME rate of 6.38.
- China's Quarter 3 2022 GDP stood at 30.76 trillion CNY (+3.9% vs. 3Q2021). China's year-to-date (YTD) September 2022 GDP stood at 87.03 trillion yuan +5.3% vs last year, per National Bureau of Statistics.
- In November 2022, the Purchasing Manager Index (PMI) of China's manufacturing industry was 49.4 percent, an increase of 20 basis points from the prior month figure of 49.2 percent.
- In October 2022, the consumer price index (CPI) was 102.1 vs 102.8 (September 2022) vs. 101.5 (October 2021), a decrease of 70 basis points from the previous month and an increase of 60 basis points from the same period last year.
- In October 2022, China's annual inflation rate fell to 2.1 percent (vs. 2.8% in September 2022 vs. 1.5% in October 2021). Prices of both food and non-food eased amid strict COVID curbs and adverse weather.
- China's trade surplus was US\$85.2B in October 2022 from US\$84.8B in the same month a year earlier. For YTD October 2022, trade surplus was US\$727.697B, with exports down 3.5 percent and imports up 10.9 percent vs. YTD October 2021.

- With China's new policy on COVID easing some restrictions on November 11, data shows searches and bookings for international flights into China doubled compared with the previous day, according to Ctrip.com.
- Air China, China Eastern Airlines, and China Southern Airlines, are planning to increase their international flights amid the country's loosening COVID-19 rules. Starting from October 30, the three aviation companies aim to operate 136 international routes in total.

Distribution by Island

CHINA (by Air)	2019	2020	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
O'ahu	88,596	15,167	5,526	7,495	3,486	115.0%
Maui County	19,743	4,000	1,400	1,891	906	108.7%
Maui	19,387	3,925	1,349	1,821	875	108.1%
Moloka'i	718	107	20	68	15	358.6%
Lāna'i	847	79	62	90	41	117.6%
Kaua'i	3,781	1,004	438	563	302	86.3%
Hawai'i Island	34,445	6,412	1,980	2,616	1,176	122.5%

Group vs. True Independent; Leisure vs. Business

CHINA (by Air)	2019	2020	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
Group vs True Independent (Net)						
Group Tour	16,198	NA	222	479	135	254.5%
True Independent (Net)	45,857	NA	5,289	6,773	3,428	97.6%
Leisure vs Business						
Pleasure (Net)	80,528	14,405	6,276	8,307	4,031	106.1%
MCI (Net)	7,246	684	69	406	47	768.4%
Convention/Conf.	3,544	392	23	277	16	1649.2%
Corp. Meetings	1,158	131	14	42	12	260.1%
Incentive	2,693	162	40	112	28	302.4%

First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
First Time Visitors (%)	77.7	NA	65.7	65.4	61.3	4.1
Repeat Visitors (%)	22.3	NA	34.3	34.6	38.7	-4.1

Tax Revenue

CHINA (by Air)	2019	2020	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	3.09	1.78	73.4%

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