



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 December 2022 Quick Facts¹

Visitor Expenditures:	\$32.3 million
Primary Purpose of Stay:	Pleasure (10,215) vs. MCI (457)
Average Length of Stay:	8.43 days
First Time Visitors:	66.0%
Repeat Visitors:	34.0%

CHINA (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD Dec. 2022P	YTD Dec. 2021	% Change YTD
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	NA	32.3	22.4	44.3%
Visitor Days	737,950	151,110	70,468	NA	94,472	70,468	34.1%
Arrivals	92,082	15,878	6,686	NA	11,210	6,686	67.7%
Average Daily Census	2,022	413	193	NA	259	193	34.1%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	NA	342.1	317.8	7.7%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	NA	2,883.0	3,349.0	-13.9%
Length of Stay (days)	8.01	9.52	10.54	NA	8.43	10.54	-20.0%

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

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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 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 had a negative COVID pre-travel test. The Safe Travels Program ended on March 25, 2022, and domestic pre-travel requirements ceased as of March 26, 2022. Passengers arriving on direct international flights through June 11, 2022 were subjected to federal U.S. entry requirements which included proof of an up-to-date vaccination document and negative COVID-19 test result taken within one day of travel. This requirement was lifted on June 12, 2022.

- For all of 2022, there were 11,210 visitors from China compared to 92,082 visitors (-87.8%) in 2019.
- There have been no direct flights from China to Hawai'i since service ended in early February 2020. There were 419 flights with 116,539 seats in 2019.
- In 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

- December 2022 month-end (ME) rate for Chinese Yuan (CNY) vs. USD was 6.97, vs. November 2022 ME rate of 7.18, vs December 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 September 2022 GDP stood at 87.03 trillion yuan +5.3% vs last year, per National Bureau of Statistics (NBS).
- In December 2022, the Purchasing Manager Index (PMI) of China's manufacturing industry was 47.0 percent, a decrease of 100 basis points from the prior month figure of 48.0 percent.
- In November 2022, China's annual inflation rate was 1.6 percent (vs. 2.1% in October 2022 vs. 2.3% in November 2021).
- China's trade surplus was US\$69.8B in November 2022 from US\$71.3B in the same month a year earlier (down 2.1%). For YTD November 2022, trade surplus was US\$798.892B, with exports up 8.8 percent and imports up 2.1 percent vs. YTD November 2021.
- Nippon Airway (ANA) has a new promotion in China, "ANA Flying HONU," from Beijing to Honolulu via Tokyo – Narita, from Chinese Lunar New Year, January 22 to March 31. The flight is scheduled to depart two times per week (Monday and Thursday) from Beijing Capital Airport (PEK).

- With China announcing on December 27, 2022 that it would eliminate all quarantine restrictions effective January 8, 2023 popular travel platform Ctrip's data showed that within half an hour of the news, searches for popular cross-border destinations had increased 10-fold. Data from Trip.com also showed outbound flights bookings were up 254 percent on the day of the announcement compared to the day before.

Distribution by Island

CHINA (by Air)	2019	2020	2021	YTD Dec. 2022P	YTD Dec. 2021	% Change YTD
O'ahu	88,596	15,167	5,526	9,200	5,526	66.5%
Maui County	19,743	4,000	1,400	2,388	1,400	70.7%
Maui	19,387	3,925	1,349	2,312	1,349	71.3%
Moloka'i	718	107	20	86	20	325.2%
Lāna'i	847	79	62	101	62	63.5%
Kaua'i	3,781	1,004	438	709	438	61.9%
Hawai'i Island	34,445	6,412	1,980	3,268	1,980	65.1%

Group vs. True Independent; Leisure vs. Business

CHINA (by Air)	2019	2020	2021	YTD Dec. 2022P	YTD Dec. 2021	% Change YTD
Group vs True Independent (Net)						
Group Tour	16,198	NA	222	572	222	157.5%
True Independent (Net)	45,857	NA	5,289	8,312	5,289	57.2%
Leisure vs Business						
Pleasure (Net)	80,528	14,405	6,276	10,215	6,276	62.8%
MCI (Net)	7,246	684	69	457	69	559.7%
Convention/Conf.	3,544	392	23	292	23	1147.6%
Corp. Meetings	1,158	131	14	42	14	203.2%
Incentive	2,693	162	40	147	40	264.1%

First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	YTD Dec. 2022P	YTD Dec. 2021	% Change YTD
First Time Visitors (%)	77.7	NA	65.7	66.0	65.7	0.3
Repeat Visitors (%)	22.3	NA	34.3	34.0	34.3	-0.3

Tax Revenue

CHINA (by Air)	2019	2020	2021	YTD Dec. 2022P	YTD Dec. 2021	% Change YTD
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	3.75	2.61	43.4%

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