



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 2023, Hawai'i Tourism China (HTC) will continue to focus on digital and social media marketing to elevate Hawai'i's image and brand awareness and promote Mālama Hawai'i and responsible travel.

January 2023 Quick Facts¹

Visitor Expenditures: \$3.9 million
 Primary Purpose of Stay: Pleasure (1,027) vs. MCI (81)
 Average Length of Stay: 8.27 days
 First Time Visitors: 69.2%
 Repeat Visitors: 30.8%

CHINA (by Air)	2019	2020	2021	2022P	2022 Annual Forecast*	Jan. 2023P	Jan. 2022P	% Change
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	32.3	NA	3.9	2.0	93.4%
Visitor Days	737,950	151,110	70,468	94,472	NA	9,623	6,625	45.3%
Arrivals	92,082	15,878	6,686	11,210	NA	1,164	789	47.5%
Average Daily Census	2,022	413	193	259	NA	310	214	45.3%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	342.1	NA	404.7	303.9	33.2%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,883.0	NA	3,345.5	2,551.8	31.1%
Length of Stay (days)	8.01	9.52	10.54	8.43	NA	8.27	8.40	-1.5%

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

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¹ 2023 and 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

- In January 2023, there were 1,164 visitors from China, compared to 789 visitors (+47.5%) in January 2022, and 10,944 visitors (-89.4%) in January 2019, prior to the COVID-19 global pandemic.
- There have been no direct flights from China to Hawai'i since service ended in early February 2020. In comparison, there were 40 scheduled flights with 10,935 seats with service from Beijing, Hangzhou and Shanghai in January 2019.
- In 2022, there were 11,210 visitors from China compared to 92,082 visitors (-87.8%) 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

- January 2023 month-end (ME) rate for Chinese Yuan (CNY) vs. USD was 6.76, vs. December 2022 ME rate of 6.97.
- China's 4th Quarter 2022 GDP stood at 33.55 trillion CNY (+2.9% vs. 4Q2021). China's 2022 GDP reached 121.02 trillion yuan (+3.0% vs last year), per National Bureau of Statistics (NBS).
- In January 2023, the Purchasing Manager Index (PMI) of China's manufacturing industry was 50.1 percent, an increase of 310 basis points 47.0 percent.
- In January 2023, China's inflation rate was 2.1 percent year on year (vs. 1.8% in December 2022).
- China announced its reopening from January 8, 2023, effectively removing all China travel restrictions for international travelers.
- Shanghai China Youth Travel Service (CYTS), one of China's top travel agencies, has been selling the mono-Hawai'i "ANA Flying HONU" package by Nippon Airway (ANA) from Beijing to Honolulu via 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).
- Demand for outbound travel from China is increasing. China's January air passenger numbers jumped 34.8 percent from the same month last year after easing of COVID curbs. The number of passport applications hit a record high in January and various embassies and consulates are reporting long queues and that U.S. visa is in high demand.

Distribution by Island

CHINA (by Air)	2019	2020	2021	2022P	Jan. 2023P	Jan. 2022P	% Change
O'ahu	88,596	15,167	5,526	9,200	995	659	51.0%
Maui County	19,743	4,000	1,400	2,388	219	145	51.0%
Maui	19,387	3,925	1,349	2,312	211	137	53.6%
Moloka'i	718	107	20	86	0	3	-100.0%
Lāna'i	847	79	62	101	8	15	-47.3%
Kaua'i	3,781	1,004	438	709	69	38	80.9%
Hawai'i Island	34,445	6,412	1,980	3,268	387	259	49.5%

Group vs. True Independent; Leisure vs. Business

CHINA (by Air)	2019	2020	2021	2022P	Jan. 2023P	Jan. 2022P	% Change
Group vs True Independent (Net)							
Group Tour	16,198	NA	222	572	117	31	272.4%
True Independent (Net)	45,857	NA	5,289	8,312	787	613	28.4%
Leisure vs Business							
Pleasure (Net)	80,528	14,405	6,276	10,215	1,027	735	39.8%
MCI (Net)	7,246	684	69	457	81	35	131.6%
Convention/Conf.	3,544	392	23	292	54	27	97.2%
Corp. Meetings	1,158	131	14	42	7	3	130.2%
Incentive	2,693	162	40	147	21	4	379.2%

First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022P	Jan. 2023P	Jan. 2022P	% Change
First Time Visitors (%)	77.7	NA	65.7	66.0	69.2	75.6	-6.3
Repeat Visitors (%)	22.3	NA	34.3	34.0	30.8	24.4	6.3

Tax Revenue

CHINA (by Air)	2019	2020	2021	2022P	Jan. 2023P	Jan. 2022P	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	3.75	0.45	0.24	92.2%

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