



## 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.

### Year-to-date March 2023 Quick Facts<sup>1</sup>

Visitor Expenditures:	\$7.3 million
Primary Purpose of Stay:	Pleasure (2,428) vs. MCI (148)
Average Length of Stay:	7.55 days
First Time Visitors:	70.2%
Repeat Visitors:	29.8%

CHINA (by Air)	2019	2020	2021	2022P	2023 Annual Forecast*	YTD Mar. 2023P	YTD Mar. 2022P	% Change
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	32.3	NA	7.3	6.9	5.1%
Visitor Days	737,950	151,110	70,468	94,472	NA	20,941	20,488	2.2%
Arrivals	92,082	15,878	6,686	11,210	NA	2,772	2,708	2.4%
Average Daily Census	2,022	413	193	259	NA	233	228	2.2%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	342.1	NA	346.3	336.9	2.8%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,883.0	NA	2,616.3	2,549.2	2.6%
Length of Stay (days)	8.01	9.52	10.54	8.43	NA	7.55	7.57	-0.2%

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2023 forecasts were not available.

### Contact Information

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<sup>1</sup> 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

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- In the first quarter of 2023, there were 2,772 visitors from China, compared to 2,708 visitors (+2.4%) in the first quarter of 2022. There were 29,289 visitors (-90.5%) in the first quarter of 2019, prior to the COVID-19 pandemic.
- There have been no direct flights from China to Hawai'i since service ended in early February 2020. In comparison, there were 122 scheduled flights with 33,224 seats with service from Beijing, Hangzhou and Shanghai in the first quarter of 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

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- March 2023 month-end (ME) rate for Chinese Yuan (CNY) vs. USD was 6.87, versus 6.95 in February 2023 and 6.35 in March 2022.
- In March 2023, the Purchasing Manager Index (PMI) of China's manufacturing industry was 51.9 percent, a decrease of 70 basis points from the prior month figure of 52.6 percent.
- In March 2023, China's annual inflation rate is expected to be 0.9 percent year on year (versus 1.0 percent last month and 1.5 percent in March 2022).
- The US has relaxed all COVID-19 testing restrictions for travelers from China as of March 10, 2023, citing a decline in COVID cases, hospitalizations and deaths and more data surrounding the variants that were circulating in China.
- Overall domestic travel bookings during the May holidays this year have increased by 150 percent year-on-year, and the number of outbound travel bookings has increased by nearly 17 times year-on-year, according to data from Trip.com.
- Alipay records that average spending of Chinese tourists using Alipay overseas doubled in the first quarter of 2023 from same period in 2019, continuing the trend of global cross-border tourism recovery.
- China added another 40 countries for resumption of outbound group tours in March 2023 including Nepal, France, Spain, Italy, Greece and Brazil.
- Chinese airlines are rapidly scaling up the number of overseas flights following the lifting of travel restrictions after the pandemic. Air China flight capacity for international routes was up 167.4 percent year on year, followed by China Eastern Airlines 425.9 percent increase and China Southern Airlines' 317 percent increase.

## Distribution by Island

CHINA (by Air)	2019	2020	2021	2022P	YTD Mar. 2023P	YTD Mar. 2022P	% Change
O'ahu	88,596	15,167	5,526	9,200	2,368	2,355	0.5%
Maui County	19,743	4,000	1,400	2,388	468	426	10.0%
Maui	19,387	3,925	1,349	2,312	442	404	9.2%
Moloka'i	718	107	20	86	9	12	-24.1%
Lāna'i	847	79	62	101	28	29	-3.8%
Kaua'i	3,781	1,004	438	709	143	128	11.3%
Hawai'i Island	34,445	6,412	1,980	3,268	845	742	13.8%

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

CHINA (by Air)	2019	2020	2021	2022P	YTD Mar. 2023P	YTD Mar. 2022P	% Change
Group vs True Independent (Net)							
Group Tour	16,198	NA	222	572	237	128	85.2%
True Independent (Net)	45,857	NA	5,289	8,312	1,935	2,062	-6.1%
Leisure vs Business							
Pleasure (Net)	80,528	14,405	6,276	10,215	2,428	2,548	-4.7%
MCI (Net)	7,246	684	69	457	148	91	62.2%
Convention/Conf.	3,544	392	23	292	84	58	44.5%
Corp. Meetings	1,158	131	14	42	22	12	86.2%
Incentive	2,693	162	40	147	48	26	86.4%

## First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022P	YTD Mar. 2023P	YTD Mar. 2022P	% Change
First Time Visitors (%)	77.7	NA	65.7	66.0	70.2	73.8	-3.7
Repeat Visitors (%)	22.3	NA	34.3	34.0	29.8	26.2	3.7

## Tax Revenue

CHINA (by Air)	2019	2020	2021	2022P	YTD Mar. 2023P	YTD Mar. 2022P	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	3.75	0.84	0.81	4.4%

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