



# 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 July 2023 Quick Facts<sup>1</sup>

Visitor Expenditures:	\$20.5 million
Primary Purpose of Stay:	Pleasure (6,186) vs. MCI (525)
Average Length of Stay:	7.76 days
First Time Visitors:	63.5%
Repeat Visitors:	36.5%

CHINA (by Air)	2019	2020	2021	2022	2023 Annual Forecast*	YTD July 2023P	YTD July 2022	% Change
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	39.6	NA	20.5	20.3	0.9%
Visitor Days	737,950	151,110	70,468	116,043	NA	55,610	59,066	-5.9%
Arrivals	92,082	15,878	6,686	13,771	NA	7,170	7,150	0.3%
Average Daily Census	2,022	413	193	318	NA	262	279	-5.9%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	341.3	NA	369.0	344.3	7.2%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,876.2	NA	2,862.1	2,844.3	0.6%
Length of Stay (days)	8.01	9.52	10.54	8.43	NA	7.76	8.26	-6.1%

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

## Contact Information

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<sup>1</sup> 2023 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 seven months of 2023, there were 7,170 visitors from China, compared to 7,150 visitors (+0.3%) in the first seven months of 2022. There were 61,703 visitors (-88.4%) in the first seven months 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 277 scheduled flights with 75,680 seats with service from Beijing, Hangzhou and Shanghai in the first seven months of 2019.
- In 2022, there were 13,771 visitors from China compared to 92,082 visitors (-85.0%) 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 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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- July 2023 month-end rate for Chinese Yuan (CNY) vs. USD was 7.13, compared to 7.23 in June 2023 and 6.74 in July 2022.
- In July 2023, the Purchasing Manager Index of China's manufacturing industry was 49.3 percent, an increase of 30 basis points from the prior month figure of 49.0 percent.
- China's YTD June 2023 GDP stood at 59.30 trillion yuan (US\$8.32 trillion), +5.5 percent year-over-year, per National Bureau of Statistics. China's 2023 Quarter 2, 2023 GDP stood at 30.80 trillion yuan (US\$4.32 trillion) +0.8 percent year-over-year.
- In July 2023, China's annual inflation rate dropped by 0.3 percent year over year (vs. 0.0% last month and 2.7% in July 2022).
- China's trade surplus in July 2023 was US\$80.6B, a decline of 20.4 percent from a record high a year ago. Exports fell to US\$281.8B and imports came to \$201.2B.
- China's outbound tourism market has recovered with destinations receiving 40.37 million trips from the Chinese mainland in the first half of 2023, according to China Tourism Academy. Short-distance outbound travel was the first to recover, with 93.9 percent of tourists concentrated in Asia.
- Due to high demand for international overseas travel, several travel agencies across the country report that Schengen and U.S. visa application sites in major cities like Beijing and Shanghai have already been fully booked until the end of 2023.
- Amid significant rebound in domestic and international travel in the first half of 2023, many publicly listed tourism companies (approximately 21) in China have moved back into profitability per first half financial reporting figures.

## Distribution by Island

CHINA (by Air)	2019	2020	2021	2022	YTD July 2023P	YTD July 2022	% Change
O'ahu	88,596	15,167	5,526	11,711	6,150	6,116	0.6%
Maui County	19,743	4,000	1,400	3,023	1,194	1,233	-3.1%
Maui	19,387	3,925	1,349	2,889	1,125	1,180	-4.6%
Moloka'i	718	107	20	86	23	42	-43.9%
Lāna'i	847	79	62	157	70	67	3.8%
Kaua'i	3,781	1,004	438	911	418	421	-0.8%
Hawai'i Island	34,445	6,412	1,980	4,148	1,946	2,128	-8.5%

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

CHINA (by Air)	2019	2020	2021	2022	YTD July 2023P	YTD July 2022	% Change
Group vs True Independent (Net)							
Group Tour	16,198	NA	222	773	486	331	46.9%
True Independent (Net)	45,857	NA	5,289	10,078	5,093	5,412	-5.9%
Leisure vs Business							
Pleasure (Net)	80,528	14,405	6,276	12,745	6,186	6,606	-6.3%
MCI (Net)	7,246	684	69	488	525	299	75.9%
Convention/Conf.	3,544	392	23	317	384	209	83.1%
Corp. Meetings	1,158	131	14	41	46	25	86.2%
Incentive	2,693	162	40	154	102	85	20.2%

## First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022	YTD July 2023P	YTD July 2022	% Change
First Time Visitors (%)	77.7	NA	65.7	63.7	63.5	67.4	-3.9
Repeat Visitors (%)	22.3	NA	34.3	36.3	36.5	32.6	3.9

## Tax Revenue

CHINA (by Air)	2019	2020	2021	2022	YTD July 2023P	YTD July 2022	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	4.59	2.38	2.37	0.3%

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