



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 November 2023 Quick Facts¹

Visitor Expenditures: \$29.6 million
Primary Purpose of Stay: Pleasure (9,158) vs. MCI (723)
Average Length of Stay: 7.57 days
First Time Visitors: 61.1%
Repeat Visitors: 38.9%

	2019	2020	2021	2022	2023 Annual Forecast*	YTD Nov. 2023P	YTD Nov. 2022	% Change
CHINA (by Air)								
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	39.6	NA	29.6	31.9	-7.1%
Visitor Days	737,950	151,110	70,468	116,043	NA	80,050	92,929	-13.9%
Arrivals	92,082	15,878	6,686	13,771	NA	10,574	10,985	-3.7%
Average Daily Census	2,022	413	193	318	NA	240	278	-13.9%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	341.3	NA	370.3	343.3	7.9%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,876.2	NA	2,803.0	2,904.2	-3.5%
Length of Stay (days)	8.01	9.52	10.54	8.43	NA	7.57	8.46	-10.5%

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

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¹ 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

- In the first 11 months of 2023, there were 10,574 visitors from China, compared to 10,985 visitors (-3.7%) in the first 11 months of 2022. There were 85,102 visitors (-87.6%) in the first 11 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 392 scheduled flights with 108,655 seats with service from Beijing, Hangzhou, and Shanghai in the first 11 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

- November 2023 month-end (ME) rate for Chinese Yuan (CNY) versus USD was 7.10 compared to 7.17 in October 2023 and 7.17 in November 2022.
- In November 2023, the Purchasing Manager Index (PMI) of China's manufacturing industry was 49.4 percent, a decrease of ten basis points from the prior month figure of 49.5 percent.
- In November 2023, China's inflation rate fell by 0.5 percent (versus decrease of 0.2 percent last month and 1.6 percent in November 2022).
- In November 2023, the unemployment rate is expected to be 5.0 percent, flat compared to the previous month.
- As borders reopened in 2023 and the Chinese outbound travel market began to recover, industry experts observed significant shifts in the preferences and habits of Chinese travelers, compared to the pre-pandemic era. During a panel discussion at the World Travel Market event at London Excel November 6-8, 2023, Adam Wu, CEO of the London-based Chinese Business Network Travel, said: "FIT, small group, and family holidays have taken precedence over large group travel, with hidden-gem or new destinations gaining popularity." Wu also highlighted that the younger generation, including post-90s and Millennials, is a driving force for outbound tourism, with self-drive holidays becoming a significant trend.
- Online travel platform Fliggy revealed that its transaction volumes of promotional items surged by over 80 percent year-over-year during the recent 11/11 online shopping festival. The number of users making transactions during the promotion period increased by 100 percent. The data shows that travel remains a high priority for Chinese consumers. Outbound travel has experienced a swift post-pandemic recovery as overseas travel products and services have contributed more than one-third of the total transaction volumes on Fliggy in 2023.
- As of November 9, 2023, the number of China-US direct regular passenger flights has increased from 48 per week to 70 per week. United Airlines has daily flights between San Francisco and Shanghai as well as two daily direct flights between San Francisco and Hong Kong. Ticket prices have reduced significantly vs. pandemic period.

Distribution by Island

CHINA (by Air)	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
O'ahu	88,596	15,167	5,526	11,711	9,071	9,287	-2.3%
Maui County	19,743	4,000	1,400	3,023	1,513	2,440	-38.0%
Maui	19,387	3,925	1,349	2,889	1,413	2,314	-39.0%
Moloka'i	718	107	20	86	56	68	-17.6%
Lāna'i	847	79	62	157	91	146	-37.5%
Kaua'i	3,781	1,004	438	911	689	652	5.7%
Hawai'i Island	34,445	6,412	1,980	4,148	2,812	3,173	-11.4%

Group vs. True Independent; Leisure vs. Business

CHINA (by Air)	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
Group vs True Independent (Net)							
Group Tour	16,198	NA	222	773	723	624	15.8%
True Independent (Net)	45,857	NA	5,289	10,078	7,448	8,130	-8.4%
Leisure vs Business							
Pleasure (Net)	80,528	14,405	6,276	12,745	9,158	10,118	-9.5%
MCI (Net)	7,246	684	69	488	723	437	65.4%
Convention/Conf.	3,544	392	23	317	491	302	62.6%
Corp. Meetings	1,158	131	14	41	64	41	54.3%
Incentive	2,693	162	40	154	178	118	50.1%

First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
First Time Visitors (%)	77.7	NA	65.7	63.7	61.1	63.9	-2.8
Repeat Visitors (%)	22.3	NA	34.3	36.3	38.9	36.1	2.8

Tax Revenue

CHINA (by Air)	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	4.59	3.44	3.72	-7.7%

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