



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 December 2023 Quick Facts¹

Visitor Expenditures:	\$33.2 million
Primary Purpose of Stay:	Pleasure (11,081) vs. MCI (788)
Average Length of Stay:	7.61 days
First Time Visitors:	62.2%
Repeat Visitors:	37.8%

CHINA (by Air)	2019	2020	2021	2022	2023 Annual Forecast*	YTD Dec. 2023P	YTD Dec. 2022	% Change
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	39.6	NA	33.2	39.6	-16.3%
Visitor Days	737,950	151,110	70,468	116,043	NA	96,496	116,043	-16.8%
Arrivals	92,082	15,878	6,686	13,771	NA	12,679	13,771	-7.9%
Average Daily Census	2,022	413	193	318	NA	264	318	-16.8%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	341.3	NA	343.6	341.3	0.7%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,876.2	NA	2,615.0	2,876.2	-9.1%
Length of Stay (days)	8.01	9.52	10.54	8.43	NA	7.61	8.43	-9.7%

*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

- For all of 2023, there were 12,679 visitors from China, compared to 13,771 visitors (-7.9%) in 2022. There were 92,082 visitors in 2019, prior to the COVID-19 pandemic.
- Visitors from China spent \$33.2 million in 2023, compared to \$39.6 million in 2022 and \$242.8 million in 2019. Daily visitor spending in 2023 was \$344 per person, higher than 2022 (\$341 per person) and 2019 (\$329 per person).
- In 2022, there were 13,771 visitors from China, compared to 6,686 visitors in 2021, 15,878 visitors in 2020 and 92,082 visitors in 2019. Total visitor spending was \$39.6 million in 2022 compared to \$22.4 million in 2021 and \$242.8 million in 2019.
- There have been no direct flights from China to Hawai'i since service ended in early February 2020. There were only 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

- December 2023 month-end rate for Chinese Yuan (CNY) versus USD was 7.08 compared to 7.10 in November 2023.
- China's 2023 GDP growth is expected to be 5.2 percent, and 2024 projected growth is 4.5 percent.
- In December 2023, the Purchasing Manager Index of China's manufacturing industry was 50.8 percent, an increase of 10 basis points from November 2023.
- In December 2023, China's inflation rate is expected to fall by 0.7 percent compared to the same period last year.
- China's trade surplus in December 2023 is expected to increase to US\$76B, up 7.6 percent.
- A recent report from the China Tourism Academy indicates that with China's aging population, improved health, more leisure time, evolving consumer behavior, and stronger spending power among seniors, silver tourism is increasingly seen as a key market and important growth engine for the tourism sector.
- China's civil aviation industry aims to promote a significant increase in direct flights between China and the U.S., and promote the operation of the domestically manufactured C919 in more countries, as part of new moves to further lift air travel.
- China's civil aviation authority CAAC projected that the nation will see its international flights recover to about 80 percent of pre-pandemic levels in 2024. In 2023, international passenger flights in China increased from less than 500 weekly at the beginning of the year, to over 4,600 flights, a 9.6-fold increase. Flights between China and Europe have recovered to over 60 percent of pre-pandemic levels. Regular direct flights between China and the US have recovered about 10 percent of pre-pandemic levels (600 flights in 2019).

Distribution by Island

CHINA (by Air)	2019	2020	2021	2022	YTD Dec. 2023P	YTD Dec. 2022	% Change
O'ahu	88,596	15,167	5,526	11,711	10,892	11,711	-7.0%
Maui County	19,743	4,000	1,400	3,023	1,744	3,023	-42.3%
Maui	19,387	3,925	1,349	2,889	1,629	2,889	-43.6%
Moloka'i	718	107	20	86	60	86	-30.1%
Lāna'i	847	79	62	157	102	157	-35.4%
Kaua'i	3,781	1,004	438	911	891	911	-2.2%
Hawai'i Island	34,445	6,412	1,980	4,148	3,537	4,148	-14.7%

Group vs. True Independent; Leisure vs. Business

CHINA (by Air)	2019	2020	2021	2022	YTD Dec. 2023P	YTD Dec. 2022	% Change
Group vs True Independent (Net)							
Group Tour	16,198	NA	222	773	819	773	5.9%
True Independent (Net)	45,857	NA	5,289	10,078	9,030	10,078	-10.4%
Leisure vs Business							
Pleasure (Net)	80,528	14,405	6,276	12,745	11,081	12,745	-13.1%
MCI (Net)	7,246	684	69	488	788	488	61.4%
Convention/Conf.	3,544	392	23	317	514	317	62.2%
Corp. Meetings	1,158	131	14	41	72	41	73.8%
Incentive	2,693	162	40	154	211	154	36.8%

First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022	YTD Dec. 2023P	YTD Dec. 2022	% Change
First Time Visitors (%)	77.7	NA	65.7	63.7	62.2	63.7	-1.5
Repeat Visitors (%)	22.3	NA	34.3	36.3	37.8	36.3	1.5

Tax Revenue

CHINA (by Air)	2019	2020	2021	2022	YTD Dec. 2023P	YTD Dec. 2022	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	4.59	3.85	4.59	-16.3%

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