



# 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 2024, Hawai'i Tourism China (HTC) will continue to focus on digital and social media marketing and leverage partnerships in travel trade events and roadshows across China to elevate Hawai'i's image and brand awareness and promote responsible and mindful travel.

## Year-to-Date May 2024 Quick Facts<sup>1</sup>

Visitor Expenditures:	\$16.8 million
Primary Purpose of Stay:	Pleasure (5,399) vs. MCI (381)
Average Length of Stay:	7.31 days
First Time Visitors:	61.6%
Repeat Visitors:	38.4%

CHINA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD May 2024P	YTD May 2023P	% Change
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	39.6	33.2	NA	16.80	13.55	24.0%
Visitor Days	737,950	151,110	70,468	116,043	96,496	NA	44,838	36,229	23.8%
Arrivals	92,082	15,878	6,686	13,771	12,679	NA	6,131	4,917	24.7%
Average Daily Census	2,022	413	193	318	264	NA	295	240	22.9%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	341.3	343.6	NA	374.7	374.1	0.2%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,876.2	2,615.0	NA	2,740.1	2,756.5	-0.6%
Length of Stay (days)	8.01	9.52	10.54	8.43	7.61	NA	7.31	7.37	-0.8%

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2024 forecasts were not available.

## Contact Information

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<sup>1</sup> 2023 and 2024 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 five months of 2024, 6,131 visitors arrived from China and visitor spending was \$16.8 million. There were 4,917 visitors (+24.7%) in the first five months of 2023 and visitor spending was \$13.6 million (+24.0%). In the first five months of pre-pandemic 2019, 44,022 visitors (-86.1%) arrived from this market and visitor spending was \$120.1 million (-86.0%).
- In 2023, there were 12,679 visitors from China, compared to 13,771 visitors (-7.9%) in 2022. There were 92,082 visitors (-86.2%) in 2019.
- Visitors from China spent \$33.2 million in 2023, compared to \$39.6 million (-16.3%) in 2022 and \$242.8 million (-86.3%) in 2019. Daily visitor spending in 2023 was \$344 per person, higher than 2022 (\$341 per person, +0.7%) and 2019 (\$329 per person, +4.4%).
- 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

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- The month-end (ME) exchange rate for the Chinese Yuan (CNY) against the USD was 7.11 in May 2024, slightly up from 7.10 in April 2024 and 7.08 in May 2023.
- China's inflation rate in April 2024 registered a year-over-year increase of 0.3 percent, compared to a 0.1 percent rise in March 2024.
- China's unemployment rate for April 2024 stood at 5.0 percent year-on-year, a decrease from the previous month's 5.2 percent, maintaining the same level as April 2023.
- At the Trip.com Group Envision 2024 Global Conference held in Shanghai on May 30, 2024, travel and technology experts convened to discuss the future of tourism, focusing particularly on attractions and tours. Mr. Ji, Vice-President of Trip.com Group and CEO of Attractions & Tours, highlighted the evolving demographics and preferences of travelers, with younger generations showing a preference for local and immersive experiences over traditional tourism activities. The conference underscored the pivotal role of technology, including AI, in reshaping the travel industry.
- Chinese holidaymakers are projected to spend 1.8 trillion yuan (\$250 billion) internationally this year, marking a 10 percent increase from 2019 levels, according to the World Travel and Tourism Council. Despite full global travel recovery, visa processing backlogs in countries such as the U.S. and higher international flight costs have led Chinese holidaymakers to favor domestic and nearby destinations.
- Educational travel, combining education and tourism to provide hands-on learning experiences, is gaining popularity among primary and secondary school students and parents across China. Experts note that this trend promotes holistic education and stimulates tourism consumption, benefiting both sectors.
- As of March 31, 2024 the U.S. Department of Transportation (DOT) and Civil Aviation Administration of China (CAAC) agreed to increase the number of round-trip direct flights between the U.S. and China from 35 to 50. This number remains significantly lower than the pre-pandemic level of 150 flights each way. Challenges such as airspace restrictions over Russia, barring U.S. carriers from the shortest routes, give Chinese airlines a cost advantage due to reduced fuel and time requirements, impacting profitability for U.S. carriers.

- Brand USA, together with the U.S. Department of Commerce and the Ministry of Culture and Tourism of the People's Republic of China, hosted the 14th U.S.-China Tourism Leadership Summit in Xian, China, from May 21-23, 2024. This event, the first since 2019, brought together government officials and travel industry leaders from both nations to encourage the return of Chinese tourists to the United States. The summit aimed to foster deeper business insights into the Chinese tourism market and to establish new connections with influential decision-makers. Hawai'i Tourism Authority was among the 75 U.S. participants.

## Distribution by Island

CHINA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
O'ahu	88,596	15,167	5,526	11,711	10,892	5,372	4,195	28.1%
Maui County	19,743	4,000	1,400	3,023	1,744	847	836	1.3%
Maui	19,387	3,925	1,349	2,889	1,629	787	790	-0.4%
Moloka'i	718	107	20	86	60	28	17	71.3%
Lāna'i	847	79	62	157	102	59	51	16.0%
Kaua'i	3,781	1,004	438	911	891	397	297	33.5%
Hawai'i Island	34,445	6,412	1,980	4,148	3,537	1,804	1,411	27.9%

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

CHINA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
Group vs True Independent (Net)								
Group Tour	16,198	NA	222	773	819	430	348	23.5%
True Independent (Net)	45,857	NA	5,289	10,078	9,030	4,313	3,523	22.4%
Leisure vs Business								
Pleasure (Net)	80,528	14,405	6,276	12,745	11,081	5,399	4,335	24.5%
MCI (Net)	7,246	684	69	488	788	381	228	67.3%
Convention/Conf.	3,544	392	23	317	514	277	120	131.7%
Corp. Meetings	1,158	131	14	41	72	23	38	-41.1%
Incentive	2,693	162	40	154	211	84	76	9.9%

## First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
First Time Visitors (%)	77.7	NA	65.7	63.7	62.2	61.6	65.5	-3.9
Repeat Visitors (%)	22.3	NA	34.3	36.3	37.8	38.4	34.5	3.9

## Tax Revenue

CHINA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	4.59	3.85	1.95	1.57	24.0%

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