



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 June 2024 Quick Facts¹

Visitor Expenditures: \$19.7 million
 Primary Purpose of Stay: Pleasure (6,728) vs. MCI (495)
 Average Length of Stay: 7.19 days
 First Time Visitors: 62.3%
 Repeat Visitors: 37.7%

CHINA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD June 2024P	YTD June 2023P	% Change
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	39.6	33.2	NA	19.65	16.60	18.4%
Visitor Days	737,950	151,110	70,468	116,043	96,496	NA	55,246	45,309	21.9%
Arrivals	92,082	15,878	6,686	13,771	12,679	NA	7,688	6,052	27.0%
Average Daily Census	2,022	413	193	318	264	NA	304	250	21.3%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	341.3	343.6	NA	355.7	366.3	-2.9%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,876.2	2,615.0	NA	2,556.0	2,742.4	-6.8%
Length of Stay (days)	8.01	9.52	10.54	8.43	7.61	NA	7.19	7.49	-4.0%

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

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¹ 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

- In the first half of 2024, 7,688 visitors arrived from China and visitor spending was \$19.7 million. There were 6,052 visitors (+27.0%) in the first half of 2023 and visitor spending was \$16.6 million (+18.4%). In the first half of pre-pandemic 2019, 53,141 visitors (-85.5%) arrived from this market and visitor spending was \$139.6 million (-85.9%).
- 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

- As of June 2024 month-end, the Chinese Yuan (CNY) to USD exchange rate was 7.13, compared to 7.11 in May 2024 and 7.22 in June 2023.
- China's inflation rate for May 2024 remained unchanged year-over-year at 0.3 percent, matching the figure from April 2024.
- The Purchasing Managers' Index (PMI) for China in June 2024 stood at 49.5 percent, identical to the May 2024 figure.
- China's unemployment rate rose to 5.2 percent year-over-year in May 2024, up from 5.0 percent in the previous month.
- According to Qunar.com, nine out of the top ten international destinations for Chinese tourists this summer are in Asia. Asian countries remain popular due to their visa-free policies for Chinese citizens, surpassing even pre-pandemic levels of popularity in 2019. Malaysia, Qatar, Singapore, and the United Arab Emirates are among the most favored destinations.
- The China Tourism Academy forecasts that outbound trips from China will reach 130 million in 2024, marking a significant resurgence in global travel for Chinese travelers. Popular destinations include Macao, Australia, Japan, Russia, and Bangladesh. There is increasing demand for Business Class and Premium Economy travel, supported by reduced airfare prices.
- As of March 31, 2024, the FAA has approved Chinese mainland airlines to operate 50 round-trip flights per week between China and the US. Similarly, US airlines can apply for up to 50 weekly direct flights to mainland China. Flight origins, destinations, dates, and flight frequencies cannot be changed without prior approval. Currently, Chinese mainland airlines have utilized all 50 round-trip flight allocations.

Distribution by Island

CHINA (by Air)	2019	2020	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
O'ahu	88,596	15,167	5,526	11,711	10,892	6,753	5,182	30.3%
Maui County	19,743	4,000	1,400	3,023	1,744	1,003	1,039	-3.4%
Maui	19,387	3,925	1,349	2,889	1,629	934	973	-4.0%
Molokai	718	107	20	86	60	34	23	44.8%
Lana'i	847	79	62	157	102	69	67	3.7%
Kauai	3,781	1,004	438	911	891	477	368	29.5%
Hawai'i Island	34,445	6,412	1,980	4,148	3,537	2,144	1,694	26.6%

Group vs. True Independent; Leisure vs. Business

CHINA (by Air)	2019	2020	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
Group vs True Independent (Net)								
Group Tour	16,198	NA	222	773	819	657	418	57.2%
True Independent (Net)	45,857	NA	5,289	10,078	9,030	5,306	4,310	23.1%
Leisure vs Business								
Pleasure (Net)	80,528	14,405	6,276	12,745	11,081	6,728	5,353	25.7%
MCI (Net)	7,246	684	69	488	788	495	255	94.6%
Convention/Conf.	3,544	392	23	317	514	358	123	191.1%
Corp. Meetings	1,158	131	14	41	72	24	42	-42.9%
Incentive	2,693	162	40	154	211	116	96	20.4%

First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
First Time Visitors (%)	77.7	NA	65.7	63.7	62.2	62.3	64.6	-2.3
Repeat Visitors (%)	22.3	NA	34.3	36.3	37.8	37.7	35.4	2.3

Tax Revenue

CHINA (by Air)	2019	2020	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	4.59	3.85	2.28	1.93	18.4%

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