



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 July 2024 Quick Facts¹

Visitor Expenditures: \$22.8 million
 Primary Purpose of Stay: Pleasure (7,880) vs. MCI (527)
 Average Length of Stay: 7.18 days
 First Time Visitors: 61.7%
 Repeat Visitors: 38.3%

| | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 Annual Forecast* | YTD July 2024P | YTD July 2023 | % Change |
|-------------------------------------|---------|---------|---------|---------|---------|-----------------------------|-------------------|------------------|----------|
| CHINA (by Air) | | | | | | | | | |
| Visitor Expenditures* (\$ Millions) | 242.8 | NA | 22.4 | 39.6 | 101.5 | NA | 22.8 | 54.2 | -57.8% |
| Visitor Days | 737,950 | 151,110 | 70,468 | 116,043 | 287,464 | NA | 64,154 | 140,321 | -54.3% |
| Arrivals | 92,082 | 15,878 | 6,686 | 13,771 | 33,966 | NA | 8,941 | 16,973 | -47.3% |
| Average Daily Census | 2,022 | 413 | 193 | 318 | 788 | NA | 301 | 662 | -54.5% |
| Per Person Per Day Spending* (\$) | 329.0 | NA | 317.8 | 341.3 | 353.0 | NA | 356.1 | 386.2 | -7.8% |
| Per Person Per Trip Spending* (\$) | 2,636.6 | NA | 3,349.0 | 2,876.2 | 2,987.2 | NA | 2,555.2 | 3,192.7 | -20.0% |
| Length of Stay (days) | 8.01 | 9.52 | 10.54 | 8.43 | 8.46 | NA | 7.18 | 8.27 | -13.2% |

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

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¹ 2024P visitor data are preliminary. 2019 – 2023 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 seven months of 2024, 8,941 visitors arrived from China and visitor spending was \$22.8 million. There were 16,973 visitors (-47.3%) in the first seven months of 2023 and visitor spending was \$54.2 million (-57.8%). In the first seven months of pre-pandemic 2019, 61,703 visitors (-85.5%) arrived from this market and visitor spending was \$161.1 million (-85.8%).
- In 2023, there were 33,966 visitors from China, compared to 13,771 visitors (+146.6%) in 2022. There were 92,082 visitors (-63.1%) in 2019.
- Visitors from China spent \$101.5 million in 2023, compared to \$39.6 million (+156.2%) in 2022 and \$242.8 million (-58.2%) in 2019. Daily visitor spending in 2023 was \$353 per person, higher than 2022 (\$341 per person, +3.4%) and 2019 (\$329 per person, +7.3%).
- 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

- The July 2024 month-end (ME) exchange rate for the Chinese Yuan (CNY) against the USD was 7.13, unchanged from both June 2024 and July 2023.
- In June 2024, China's inflation rate was 0.2 percent year-on-year, a slight decrease from the 0.3 percent increase recorded in May 2024.
- China's unemployment rate for June 2024 was 5.0 percent, down from 5.2 percent the previous month.
- Chinese international travel continued to rebound strongly in the second quarter of 2024, with over 1.5 million outbound trips during the Golden Week holiday. Outbound travel during China's May Day holiday reached 87 percent of 2019 levels. The market base of Chinese travelers expanded, with increased participation from Gen Z women and older demographics. Top destinations included Singapore (15.6%), Thailand (13.8%), Malaysia (12%), Japan (11.7%), and South Korea (11.5%). Interest in less common destinations like Europe (10.1%) and Australia (8.2%) also grew.
- According to Qunar.com, nine of the top ten international destinations for Chinese tourists this summer are in Asia. Despite increased European interest due to events like the UEFA European Championship in Germany and the Paris 2024 Summer Olympics, Asian countries remain preferred, partly due to visa-free policies for Chinese citizens. Malaysia, Qatar, Singapore, and the UAE are among the most popular destinations this summer, surpassing pre-pandemic popularity.
- Chinese students are increasingly choosing to spend on overseas travel as they did before the pandemic. Due to changes in visa policies and global inflation trends, the United States is less attractive, leading Chinese students to explore options in Asia and Western countries such as Britain and Australia.

Distribution by Island

| CHINA (by Air) | 2019 | 2020 | 2021 | 2022 | 2023 | YTD July 2024P | YTD July 2023 | % Change |
|----------------|--------|--------|-------|--------|--------|----------------|---------------|----------|
| O'ahu | 88,596 | 15,167 | 5,526 | 11,711 | 31,728 | 7,843 | 15,502 | -49.4% |
| Maui County | 19,743 | 4,000 | 1,400 | 3,023 | 5,358 | 1,162 | 3,565 | -67.4% |
| Maui | 19,387 | 3,925 | 1,349 | 2,889 | 5,232 | 1,067 | 3,511 | -69.6% |
| Moloka'i | 718 | 107 | 20 | 86 | 78 | 34 | 18 | 88.9% |
| Lāna'i | 847 | 79 | 62 | 157 | 75 | 99 | 48 | 107.1% |
| Kaua'i | 3,781 | 1,004 | 438 | 911 | 2,664 | 538 | 658 | -18.3% |
| Hawai'i Island | 34,445 | 6,412 | 1,980 | 4,148 | 10,071 | 2,479 | 4,377 | -43.4% |

Group vs. True Independent; Leisure vs. Business

| CHINA (by Air) | 2019 | 2020 | 2021 | 2022 | 2023 | YTD July 2024P | YTD July 2023 | % Change |
|---------------------------------|--------|--------|-------|--------|--------|----------------|---------------|----------|
| Group vs True Independent (Net) | | | | | | | | |
| Group Tour | 16,198 | NA | 222 | 773 | 2,058 | 787 | 1,163 | -32.4% |
| True Independent (Net) | 45,857 | NA | 5,289 | 10,078 | 21,297 | 6,097 | 10,966 | -44.4% |
| Leisure vs Business | | | | | | | | |
| Pleasure (Net) | 80,528 | 14,405 | 6,276 | 12,745 | 29,386 | 7,880 | 14,511 | -45.7% |
| MCI (Net) | 7,246 | 684 | 69 | 488 | 2,909 | 527 | 1,403 | -62.5% |
| Convention/Conf. | 3,544 | 392 | 23 | 317 | 1,921 | 376 | 547 | -31.2% |
| Corp. Meetings | 1,158 | 131 | 14 | 41 | 598 | 28 | 573 | -95.2% |
| Incentive | 2,693 | 162 | 40 | 154 | 400 | 125 | 290 | -57.0% |

First Timers vs. Repeat Visitors

| CHINA (by Air) | 2019 | 2020 | 2021 | 2022 | 2023 | YTD July 2024P | YTD July 2023 | % Change |
|-------------------------|------|------|------|------|------|----------------|---------------|----------|
| First Time Visitors (%) | 77.7 | NA | 65.7 | 63.7 | 63.9 | 61.7 | 62.3 | -0.6 |
| Repeat Visitors (%) | 22.3 | NA | 34.3 | 36.3 | 36.1 | 38.3 | 37.7 | 0.6 |

Tax Revenue

| CHINA (by Air) | 2019 | 2020 | 2021 | 2022 | 2023 | YTD July 2024P | YTD July 2023 | % Change |
|--|-------|------|------|------|-------|----------------|---------------|----------|
| State tax revenue generated* (\$ Millions) | 28.34 | NA | 2.61 | 4.59 | 11.77 | 2.65 | 6.29 | -57.8% |

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