



# 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 August 2024 Quick Facts<sup>1</sup>

Visitor Expenditures: \$26.0 million  
 Primary Purpose of Stay: Pleasure (9,061) vs. MCI (562)  
 Average Length of Stay: 7.18 days  
 First Time Visitors: 61.2%  
 Repeat Visitors: 38.8%

	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Aug. 2024P	YTD Aug. 2023	% Change
CHINA (by Air)									
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	39.6	101.5	NA	26.0	67.1	-61.3%
Visitor Days	737,950	151,110	70,468	116,043	287,464	NA	73,726	184,299	-60.0%
Arrivals	92,082	15,878	6,686	13,771	33,966	NA	10,275	21,574	-52.4%
Average Daily Census	2,022	413	193	318	788	NA	302	758	-60.2%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	341.3	353.0	NA	352.2	363.9	-3.2%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,876.2	2,987.2	NA	2,527.4	3,108.4	-18.7%
Length of Stay (days)	8.01	9.52	10.54	8.43	8.46	NA	7.18	8.54	-16.0%

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

## Contact Information

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<sup>1</sup> 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

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- In the first eight months of 2024, 10,275 visitors arrived from China and visitor spending was \$26.0 million. There were 21,574 visitors (-52.4%) in the first eight months of 2023 and visitor spending was \$67.1 million (-61.3%). In the first eight months of pre-pandemic 2019, 69,626 visitors (-85.2%) arrived from this market and visitor spending was \$182.1 million (-85.7%).
- 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

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- In August 2024, the exchange rate for the Chinese Yuan (CNY) versus the USD was 7.13, unchanged from July 2024 but slightly improved from 7.18 in August 2023.
- China's annual inflation rate rose to 0.6 percent in August 2024, up from 0.5 percent in July but less than the market forecast of 0.7 percent.
- The Purchasing Managers' Index (PMI) for China in August 2024 remained at 49.1 percent, compared to 49.4 percent in June 2024.
- China's unemployment rate for July 2024 was 5.2 percent, consistent with the previous month's figure.
- Favorable policies, including visa-free entry and 144-hour transit visa exemptions, have led to a significant increase in cross-border travel this summer. In July and August 2024, China's border control agencies processed 110 million inbound and outbound trips, averaging 1.78 million per day, a 30 percent increase from the same period last year. The daily peak occurred on August 24, with nearly 2.24 million travelers, reaching 97.2 percent of the historical high, according to the National Immigration Administration.
- On August 30, 2024, United Airlines resumed its direct flight from Shanghai to Los Angeles (flight UA199), marking a significant step in reconnecting China and the US. This resumption is anticipated to boost Chinese tourism to Los Angeles. At the gala event, Rofia Larsson, VP of Global Tourism Development at Tourism Los Angeles, emphasized the route's importance in linking Shanghai and Los Angeles, facilitating easier travel for both Chinese and American tourists. Los Angeles remains committed to the Chinese market, introducing new attractions and experiences to welcome visitors.
- Data from the US International Trade Administration shows that only 1.2 million people flew between the US and China in the first seven months of 2024, compared to 5.1 million during the same period five years ago. The closure of Russian airspace to US airlines but not to Chinese carriers has provided a competitive advantage in cost and time for Chinese airlines. The share of Americans flying between the two countries was three percentage points lower in the first seven months of 2024 compared to 2019, while the number of foreign travelers, primarily Chinese nationals, has increased accordingly.

## Distribution by Island

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
O'ahu	88,596	15,167	5,526	11,711	31,728	8,985	19,967	-55.0%
Maui County	19,743	4,000	1,400	3,023	5,358	1,411	4,570	-69.1%
Maui	19,387	3,925	1,349	2,889	5,232	1,306	4,511	-71.0%
Moloka'i	718	107	20	86	78	35	18	94.9%
Lāna'i	847	79	62	157	75	108	55	98.2%
Kaua'i	3,781	1,004	438	911	2,664	602	897	-32.8%
Hawai'i Island	34,445	6,412	1,980	4,148	10,071	2,809	5,472	-48.7%

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

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
Group vs True Independent (Net)								
Group Tour	16,198	NA	222	773	2,058	919	1,190	-22.8%
True Independent (Net)	45,857	NA	5,289	10,078	21,297	6,984	14,023	-50.2%
Leisure vs Business								
Pleasure (Net)	80,528	14,405	6,276	12,745	29,386	9,061	18,222	-50.3%
MCI (Net)	7,246	684	69	488	2,909	562	2,043	-72.5%
Convention/Conf.	3,544	392	23	317	1,921	386	1,145	-66.3%
Corp. Meetings	1,158	131	14	41	598	36	575	-93.7%
Incentive	2,693	162	40	154	400	143	330	-56.6%

## First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
First Time Visitors (%)	77.7	NA	65.7	63.7	63.9	61.2	63.7	-2.5
Repeat Visitors (%)	22.3	NA	34.3	36.3	36.1	38.8	36.3	2.5

## Tax Revenue

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	4.59	11.77	3.01	7.78	-61.3%

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