



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 December 2024 Quick Facts^{1/}

Visitor Expenditures: \$40.5 million
 Primary Purpose of Stay: Pleasure (13,962) vs. MCI (847)
 Average Length of Stay: 7.24 days
 First Time Visitors: 61.5%
 Repeat Visitors: 38.5%

CHINA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Dec. 2024P ^{1/}	YTD Dec. 2023	% Change
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	39.6	101.5	NA	40.5	101.5	-60.1%
Visitor Days	737,950	151,110	70,468	116,043	287,464	NA	114,025	287,464	-60.3%
Arrivals	92,082	15,878	6,686	13,771	33,966	NA	15,741	33,966	-53.7%
Average Daily Census	2,022	413	193	318	788	NA	312	788	-60.4%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	341.3	353.0	NA	355.3	353.0	0.7%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,876.2	2,987.2	NA	2,574.0	2,987.2	-13.8%
Length of Stay (days)	8.01	9.52	10.54	8.43	8.46	NA	7.24	8.46	-14.4%

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

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^{1/} 2024P visitor data are preliminary and under-reported, pending final immigration reports from the National Travel and Tourism Office (NTTO). 2019 – 2023 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, data from the NTTO and final passenger counts from Airline Traffic Summary reports.

Market Summary

- In calendar year 2024, 15,741 visitors arrived from China, total visitor spending was \$40.5 million and daily spending was \$355 per person. It should be noted that 2024 data are preliminary and under-reported, pending final immigration reports from the National Travel and Tourism Office. There were 33,966 visitors in 2023, total visitor spending was \$101.5 million and daily spending was \$353 per person. In pre-pandemic 2019, 92,082 visitors arrived from this market, total visitor spending was \$242.8 million and daily spending was \$329 per person.
- 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 Chinese Yuan (CNY) ended December 2024 at an exchange rate of 7.29 to the USD, slightly up from 7.24 in November 2024 and 7.08 in December 2023.
- China's Purchasing Managers' Index (PMI) for December 2024 was 50.5, compared to the November 2024 reading of 50.3 percent. This increase suggests slight growth in the manufacturing sector, as a PMI above 50 indicates expansion.
- China's annual inflation rate eased to 0.2 percent in November 2024, down from 0.3 percent in October 2024, marking the lowest level since June.
- The unemployment rate in China for November 2024 remained unchanged at 5.0 percent, the same as the previous month in October. This figure slightly improved from the 5.1 percent reported in September 2024, suggesting a stable labor market.
- China's outbound tourism in 2024 experienced a nearly 10 percent decline in long-haul travel compared to 2023, influenced by geopolitical tensions and economic uncertainties. However, overall travel spending increased, especially among higher-income groups seeking premium experiences. A survey across 15 cities found that more than half of respondents plan to travel during the 2025 Spring Festival, with domestic trips preferred and Japan and the US as top international destinations. While 95.1 percent of respondents are considering travel, they expect fewer trips than in 2024. Challenges such as language barriers and digital accessibility persist, particularly for older travelers. New media platforms are increasingly influencing travel decisions, but traditional online travel agencies remain dominant due to their transparency and convenience, despite ongoing concerns about service quality.

Distribution by Island

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Dec. 2024P ¹	YTD Dec. 2023	% Change
O'ahu	88,596	15,167	5,526	11,711	31,728	13,692	31,728	-56.8%
Maui County	19,743	4,000	1,400	3,023	5,358	2,310	5,358	-56.9%
Maui	19,387	3,925	1,349	2,889	5,232	2,181	5,232	-58.3%
Moloka'i	718	107	20	86	78	39	78	-49.7%
Lāna'i	847	79	62	157	75	137	75	83.6%
Kaua'i	3,781	1,004	438	911	2,664	934	2,664	-64.9%
Hawai'i Island	34,445	6,412	1,980	4,148	10,071	4,368	10,071	-56.6%

Group vs. True Independent; Leisure vs. Business

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Dec. 2024P ¹	YTD Dec. 2023	% Change
Group vs True Independent (Net)								
Group Tour	16,198	NA	222	773	2,058	1,549	2,058	-24.7%
True Independent (Net)	45,857	NA	5,289	10,078	21,297	10,621	21,297	-50.1%
Leisure vs Business								
Pleasure (Net)	80,528	14,405	6,276	12,745	29,386	13,962	29,386	-52.5%
MCI (Net)	7,246	684	69	488	2,909	847	2,909	-70.9%
Convention/Conf.	3,544	392	23	317	1,921	549	1,921	-71.4%
Corp. Meetings	1,158	131	14	41	598	68	598	-88.7%
Incentive	2,693	162	40	154	400	235	400	-41.3%

First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Dec. 2024P ¹	YTD Dec. 2023	% Change
First Time Visitors (%)	77.7	NA	65.7	63.7	63.9	61.5	63.9	-2.4
Repeat Visitors (%)	22.3	NA	34.3	36.3	36.1	38.5	36.1	2.4

Tax Revenue

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Dec. 2024P ¹	YTD Dec. 2023	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	4.59	11.77	4.70	11.77	-60.1%

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