



China Fact Sheet

China Overview

The Hawai'i Tourism Authority selected TRAVLOCAL LIMITED for Brand Marketing and Management Services in China. In 2025, Hawai'i Tourism China (HTC) focuses on digital and social media marketing and leverages partnerships in travel trade events and roadshows across China to elevate Hawai'i's brand image and promote responsible travel.

Year-to-Date February 2025 Quick Facts^{1/}

Visitor Expenditures: \$6.0 million
 Primary Purpose of Stay: Pleasure (2,287) vs. MCI (148)
 Average Length of Stay: 7.44 days
 First Time Visitors: 62.5%
 Repeat Visitors: 37.5%

CHINA (by Air)	2019	2020	2021	2022	2023	2024P ^{1/}	2025 Annual Forecast	YTD Feb 2025P ^{1/}	YTD Feb. 2024P ^{1/}	% Change
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	39.6	101.5	40.5	NA	6.0	6.9	-12.5%
Visitor Days	737,950	151,110	70,468	116,043	287,464	114,025	NA	18,896	17,079	10.6%
Arrivals	92,082	15,878	6,686	13,771	33,966	15,741	NA	2,539	2,297	10.5%
Average Daily Census	2,022	413	193	318	788	312	NA	320	285	12.5%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	341.3	353.0	355.3	NA	317.7	401.7	-20.9%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,876.2	2,987.2	2,574.0	NA	2,364.5	2,987.3	-20.8%
Length of Stay (days)	8.01	9.52	10.54	8.43	8.46	7.24	NA	7.44	7.44	0.1%

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

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^{1/} 2024P and 2025P 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 DIO Mi Airline database, data from the NTTO and final passenger counts from Airline Traffic Summary reports.

Market Summary

- In the first two months of 2025, 2,539 visitors arrived from China, total visitor spending was \$6.0 million and daily spending was \$318 per person. In the first two months of 2024, there were 2,297 visitors, with \$6.9 million in total visitor spending and daily spending was \$402 per person. It should be noted that 2024 and 2025 data are preliminary and under-reported, pending final immigration reports from the National Travel and Tourism Office.
- Preliminary data show 15,741 visitors from China in 2024, total visitor spending was \$40.5 million and daily spending was \$355 per person.
- 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.
- 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

- In 2024, China's GDP reached 134,908 trillion yuan (USD 18,480 trillion), growing by 5.0 percent compared to the previous year. This growth was fueled by increased domestic consumption, exports, and infrastructure investments, reflecting the country's steady economic recovery. Despite global uncertainties, China's economy remained resilient, underlining its role as a major global economic force.
- In 2023, 1.08 million Chinese travelers visited the U.S., making China the third largest source of travel exports at USD 21 billion. The National Travel and Tourism Office (NTTO) projects Chinese visitation will grow 150 percent from 2023 to 2025, outpacing overall overseas visits. By 2026, visits from China are expected to exceed 2019 levels, reaching 3.2 million. From January to July 2024, Chinese visitation increased by 73 percent, and the U.S. issued over 266,000 nonimmigrant visas to Chinese nationals in the first half of FY 2024, more than three times the previous year's number.
- Although international flight capacity in mainland China is at 87 percent of 2019 levels, Chinese consumers' overseas luxury spending has already surpassed pre-pandemic figures, with a 32 percent increase in May and 22 percent growth in June 2024. In the first half of 2024, overseas spending by mainland Chinese surged. However, future growth in both domestic and international spending will depend on exchange rates and business policies. Data shows a shift in luxury spending from Europe to more price-competitive Asian markets like Japan, South Korea, and Singapore.
- Delta will restart direct service from Shanghai Pudong (PVG) to Los Angeles (LAX) in June 2025, with three weekly flights. The route will be operated by Delta's flagship Airbus A350 wide-body aircraft. Once the Shanghai-Los Angeles service resumes, Delta will offer 17 direct flights per week between China and the United States, including the existing routes from Shanghai to Detroit and Seattle.

Distribution by Island

CHINA (by Air)	2019	2020	2021	2022	2023	2024P ¹	YTD Feb 2025P ¹	YTD Feb. 2024P ¹	% Change
O'ahu	88,596	15,167	5,526	11,711	31,728	13,692	2,271	2,021	12.4%
Maui County	19,743	4,000	1,400	3,023	5,358	2,310	380	265	43.4%
Maui	19,387	3,925	1,349	2,889	5,232	2,181	359	233	54.2%
Moloka'i	718	107	20	86	78	39	6	14	-56.2%
Lāna'i	847	79	62	157	75	137	35	30	16.0%
Kaua'i	3,781	1,004	438	911	2,664	934	120	151	-20.7%
Hawai'i Island	34,445	6,412	1,980	4,148	10,071	4,368	846	685	23.4%

Group vs. True Independent; Leisure vs. Business

CHINA (by Air)	2019	2020	2021	2022	2023	2024P ¹	YTD Feb 2025P ¹	YTD Feb. 2024P ¹	% Change
Group vs True Independent (Net)									
Group Tour	16,198	NA	222	773	2,058	1,549	216	163	33.1%
True Independent (Net)	45,857	NA	5,289	10,078	21,297	10,621	1,728	1,587	8.9%
Leisure vs Business									
Pleasure (Net)	80,528	14,405	6,276	12,745	29,386	13,962	2,287	2,040	12.1%
MCI (Net)	7,246	684	69	488	2,909	847	148	135	9.3%
Convention/Conf.	3,544	392	23	317	1,921	549	97	105	-7.8%
Corp. Meetings	1,158	131	14	41	598	68	6	12	-47.7%
Incentive	2,693	162	40	154	400	235	49	20	143.1%

First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022	2023	2024P ¹	YTD Feb 2025P ¹	YTD Feb. 2024P ¹	% Change
First Time Visitors (%)	77.7	NA	65.7	63.7	63.9	61.5	62.5	60.2	2.4
Repeat Visitors (%)	22.3	NA	34.3	36.3	36.1	38.5	37.5	39.8	-2.4

Tax Revenue

CHINA (by Air)	2019	2020	2021	2022	2023	2024P ¹	YTD Feb 2025P ¹	YTD Feb. 2024P ¹	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	4.59	11.77	4.70	0.70	0.80	-12.5%

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