



# 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 April 2025 Quick Facts<sup>1/</sup>

Visitor Expenditures: \$11.9 million  
Primary Purpose of Stay: Pleasure (4,295) vs. MCI (258)  
Average Length of Stay: 7.27 days  
First Time Visitors: 64.7%  
Repeat Visitors: 35.3%

| CHINA (by Air)                      | 2019    | 2020    | 2021    | 2022    | 2023    | 2024RP <sup>1/</sup> | 2025 Annual Forecast | YTD Apr 2025P <sup>1/</sup> | YTD Apr. 2024RP <sup>1/</sup> | % Change |
|-------------------------------------|---------|---------|---------|---------|---------|----------------------|----------------------|-----------------------------|-------------------------------|----------|
| Visitor Expenditures* (\$ Millions) | 242.8   | NA      | 22.4    | 39.6    | 101.5   | 40.6                 | NA                   | 11.9                        | 12.3                          | -2.8%    |
| Visitor Days                        | 737,950 | 151,110 | 70,468  | 116,043 | 287,464 | 114,391              | NA                   | 34,871                      | 32,147                        | 8.5%     |
| Arrivals                            | 92,082  | 15,878  | 6,686   | 13,771  | 33,966  | 15,792               | NA                   | 4,799                       | 4,401                         | 9.0%     |
| Average Daily Census                | 2,022   | 413     | 193     | 318     | 788     | 313                  | NA                   | 291                         | 266                           | 9.4%     |
| Per Person Per Day Spending* (\$)   | 329.0   | NA      | 317.8   | 341.3   | 353.0   | 355.4                | NA                   | 342.0                       | 381.8                         | -10.4%   |
| Per Person Per Trip Spending* (\$)  | 2,636.6 | NA      | 3,349.0 | 2,876.2 | 2,987.2 | 2,574.0              | NA                   | 2,485.2                     | 2,789.1                       | -10.9%   |
| Length of Stay (days)               | 8.01    | 9.52    | 10.54   | 8.43    | 8.46    | 7.24                 | NA                   | 7.27                        | 7.30                          | -0.5%    |

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

## Contact Information

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<sup>1/</sup> 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 DIIIO Mi Airline database, data from the NTTO and final passenger counts from Airline Traffic Summary reports.  
RP=March and April 2024 data were revised.

## Market Summary

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- In the first four months of 2025, 4,799 visitors arrived from China, total visitor spending was \$11.9 million and daily spending was \$342 per person. In the first four months of 2024, there were 4,401 visitors, with \$12.3 million in total visitor spending and daily spending was \$382 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 15,792 visitors from China in 2024, total visitor spending was \$40.6 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

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- In April 2025, the Chinese Yuan (CNY) appreciated slightly to 7.23 against the USD, up from 7.26 in March 2025, but down 0.7 percent year-over-year from 7.18 in April 2024. The yuan remains stable, supported by cautious central bank actions and modest capital inflows.
- China's economy showed signs of stabilization, with the Consumer Price Index (CPI) rising by 0.1 percent year-over-year, the first positive growth since late 2024, indicating a recovery in domestic demand. This was driven by holiday travel and modest food price increases. However, Producer Prices (PPI) continued to decline, falling 1.8 percent year-over-year, marking the 31st consecutive month of contraction, although at a slower pace than in March 2025.
- In the first quarter of 2025, China processed 163 million cross-border passenger trips, a 15.3 percent increase year-on-year, according to the National Immigration Administration. This total included 80.27 million trips by mainland residents, 65.72 million from Hong Kong, Macao, and Taiwan, and 17.44 million by foreign nationals, which rose by 33.4 percent year-on-year. Inbound growth was driven by visa-free entry policies, with 6.57 million foreign visitors entering under these policies, making up 71 percent of total foreign arrivals. Cross-border transport also rose by 15.5 percent, and authorities plan to introduce further measures to improve immigration efficiency and travel convenience.
- The 2024 Outbound Travel Trend Report by Ctrip reveals that customized tours now make up over 40 percent of high-end travel products, with per capita consumption increasing by 2.5 times compared to traditional offerings.
- The 45th Australian Tourism Exchange took place from April 27 to May 1, 2025, in Brisbane, attracting 1,600 Australian tourism suppliers and global partners, including 726 buyers from 31 countries. China remains a key source market for Australian tourism, with a 29 percent increase in Chinese visitors from March 2024 to February 2025. This year, 132 Chinese buyers from 120 companies participated, including 22 high-end buyers who explored Australia's offerings and sought partnerships. Tourism Australia continues to prioritize the Chinese market to meet growing demand and strengthen bilateral cooperation.

- Air China began operating two weekly non-stop flights between Beijing Capital International Airport (PEK) and Washington Dulles International Airport (IAD) starting March 13, 2025. Flight CA817 departs Beijing on Tuesdays and Saturdays, arriving in Washington, D.C., in the afternoon. The return flight, CA818, leaves Washington on the same days, with a direct route to Beijing, replacing the previous stopover in Los Angeles.

## Distribution by Island

| CHINA (by Air) | 2019   | 2020   | 2021  | 2022   | 2023   | 2024RP <sup>1</sup> | YTD Apr 2025P <sup>1</sup> | YTD Apr. 2024RP <sup>1</sup> | % Change |
|----------------|--------|--------|-------|--------|--------|---------------------|----------------------------|------------------------------|----------|
| O'ahu          | 88,596 | 15,167 | 5,526 | 11,711 | 31,728 | 13,737              | 4,256                      | 3,826                        | 11.2%    |
| Maui County    | 19,743 | 4,000  | 1,400 | 3,023  | 5,358  | 2,317               | 714                        | 596                          | 19.8%    |
| Maui           | 19,387 | 3,925  | 1,349 | 2,889  | 5,232  | 2,188               | 673                        | 544                          | 23.7%    |
| Moloka'i       | 718    | 107    | 20    | 86     | 78     | 40                  | 14                         | 22                           | -35.4%   |
| Lāna'i         | 847    | 79     | 62    | 157    | 75     | 138                 | 62                         | 51                           | 22.1%    |
| Kaua'i         | 3,781  | 1,004  | 438   | 911    | 2,664  | 937                 | 224                        | 267                          | -16.2%   |
| Hawai'i Island | 34,445 | 6,412  | 1,980 | 4,148  | 10,071 | 4,383               | 1,584                      | 1,274                        | 24.4%    |

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

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

| CHINA (by Air)                  | 2019   | 2020   | 2021  | 2022   | 2023   | 2024RP <sup>1</sup> | YTD Apr 2025P <sup>1</sup> | YTD Apr. 2024RP <sup>1</sup> | % Change |
|---------------------------------|--------|--------|-------|--------|--------|---------------------|----------------------------|------------------------------|----------|
| Group vs True Independent (Net) |        |        |       |        |        |                     |                            |                              |          |
| Group Tour                      | 16,198 | NA     | 222   | 773    | 2,058  | 1,552               | 397                        | 313                          | 26.6%    |
| True Independent (Net)          | 45,857 | NA     | 5,289 | 10,078 | 21,297 | 10,658              | 3,353                      | 3,075                        | 9.1%     |
| Leisure vs Business             |        |        |       |        |        |                     |                            |                              |          |
| Pleasure (Net)                  | 80,528 | 14,405 | 6,276 | 12,745 | 29,386 | 13,962              | 4,295                      | 3,893                        | 10.3%    |
| MCI (Net)                       | 7,246  | 684    | 69    | 488    | 2,909  | 849                 | 258                        | 256                          | 0.7%     |
| Convention/Conf.                | 3,544  | 392    | 23    | 317    | 1,921  | 550                 | 140                        | 175                          | -20.3%   |
| Corp. Meetings                  | 1,158  | 131    | 14    | 41     | 598    | 68                  | 27                         | 22                           | 25.1%    |
| Incentive                       | 2,693  | 162    | 40    | 154    | 400    | 236                 | 95                         | 61                           | 55.6%    |

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

## First Timers vs. Repeat Visitors

| CHINA (by Air)          | 2019 | 2020 | 2021 | 2022 | 2023 | 2024RP <sup>1</sup> | YTD Apr 2025P <sup>1</sup> | YTD Apr. 2024RP <sup>1</sup> | % Change |
|-------------------------|------|------|------|------|------|---------------------|----------------------------|------------------------------|----------|
| First Time Visitors (%) | 77.7 | NA   | 65.7 | 63.7 | 63.9 | 61.5                | 64.7                       | 61.4                         | 3.2      |
| Repeat Visitors (%)     | 22.3 | NA   | 34.3 | 36.3 | 36.1 | 38.5                | 35.3                       | 38.6                         | -3.2     |

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

## Tax Revenue

| CHINA (by Air)                             | 2019  | 2020 | 2021 | 2022 | 2023  | 2024RP <sup>1</sup> | YTD Apr 2025P <sup>1</sup> | YTD Apr. 2024RP <sup>1</sup> | % Change |
|--|-------|------|------|------|-------|---------------------|----------------------------|------------------------------|----------|
| State tax revenue generated* (\$ Millions) | 28.34 | NA   | 2.61 | 4.59 | 11.77 | 4.72                | 1.38                       | 1.42                         | -2.8%    |

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

P=Preliminary data. RP=March and April 2024 preliminary data were revised.