



China Fact Sheet

China Overview

The Hawai'i Tourism Authority selected TRAVLOCAL LIMITED for Brand Marketing and Management Services in China. China market continues to lead in per person per day spending among all major source markets for Hawai'i. In 2022, Hawai'i Tourism China (HTC) focuses on market education with Mālama Hawai'i messaging. An integrated digital marketing strategy is deployed to elevate Hawai'i's image and brand awareness by using Chinese consumer preferred social and digital media platforms highlighting Hawai'i's culture, natural resources, community and regenerative tourism.

Year-to-date March 2022 Quick Facts¹

Visitor Expenditures:	\$6.9 million
Primary Purpose of Stay:	Pleasure (2,548) vs. MCI (91)
Average Length of Stay:	7.57 days
First Time Visitors:	73.8%
Repeat Visitors:	26.2%

CHINA (by Air)	2019	2020	2021P	2022 Annual Forecast	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
Visitor Expenditures* (\$ Millions)	242.8	NA	18.2	NA	6.9	1.2	480.2%
Visitor Days	737,950	151,110	63,065	NA	20,488	4,099	399.8%
Arrivals	92,082	15,878	6,348	NA	2,708	307	781.7%
Average Daily Census	2,022	413	173	NA	228	46	399.8%
Per Person Per Day Spending* (\$)	329.0	NA	288.5	NA	336.9	290.2	16.1%
Per Person Per Trip Spending* (\$)	2,636.6	NA	2,866.3	NA	2,549.2	3,873.7	-34.2%
Length of Stay (days)	8.01	9.52	9.93	NA	7.57	13.35	-43.3%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 forecasts were not available at the time of report publication.

Contact Information

Hawai'i Tourism Authority: Jadie Goo
 Sr. Brand Manager
 Tel: (808) 973-2252
jadie@gohta.net

Hawai'i Tourism China: Dennis Suo
 Chief Executive Officer
 Tel: (808) 683-6088
dennis.suo@htchina.net.cn

¹ 2022 and 2021 visitor data are preliminary. 2020 and 2019 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

Prior to the global COVID-19 pandemic and Hawai'i's quarantine requirements for travelers, the State of Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. Due to concerns about the rapid surge of COVID cases worldwide and the limitations of Hawai'i's health care system, on March 17, 2020 Hawai'i Gov. David Ige asked visitors to postpone their trips for at least 30 days. The counties also began issuing stay-at-home orders. On March 26, 2020, the state implemented a 14-day mandatory travel quarantine. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. This continued until mid-October 2020, when the state initiated the Safe Travels program, which allowed trans-Pacific travelers to bypass the quarantine if they had a valid negative test for COVID-19.

Through March 25, 2022, domestic passengers could bypass the State's mandatory five-day self-quarantine if they were up-to-date on their vaccination or with a negative COVID-19 pre-travel test result from a Trusted Testing Partner through the Safe Travels program. The Safe Travels Program ended on March 25, 2022, and domestic pre-travel requirements ceased as of March 26, 2022. Passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included proof of an up-to-date vaccination document and negative COVID-19 test result taken within one day of travel, or documentation of having recovered from COVID-19 in the past 90 days, prior to their flight.

- Through the first quarter of 2022, there were 2,708 visitors from China, compared to 29,289 visitors in the first quarter of 2019.
- There have been no direct flights from China to Hawai'i since service ended in early February 2020. There were 122 flights with 33,224 seats in the first quarter of 2019.
- For all of 2021, 6,348 visitors arrived from China. In comparison, there were 15,878 visitors (-60.0%) from China in 2020, and 92,082 visitors (-93.1%) in 2019.
- There were 28 scheduled flights and 8,176 seats from Shanghai China in 2020, compared to 419 flights and 116,539 seats in 2019 with service to Shanghai (90,812 seats), Beijing (24,941) and Hangzhou (786).

Market Conditions

- China's 2021 GDP stood at 114.37 trillion yuan (US\$18 trillion) vs. 101.36 trillion yuan in 2020, accounting for 18 percent of the global economy, according to the National Bureau of Statistics (NBS). GDP grew by 8.1 percent over 2020, beating Beijing's target of above 6 percent.
- March 2022 month-end Chinese Yuan (CNY) vs. USD was 6.34 compared to 6.32 and 6.57 in February 2022 and March 2021, respectively.
- In March 2022, China's manufacturing purchasing managers' Index (PMI) was 42.0, down from 50.2 in February 2022, the lowest since the onset of the pandemic in March 2020. It is worse than the consensus of 49.7 among some economists tracked by Bloomberg. A trading below 50 indicates contraction in activity.
- In March 2022, China announced a new plan for its post-pandemic rebound, as the country's national lawmakers and political advisors gathered to map out development priorities for this year, setting the GDP growth target at around 5.5 percent in 2022, CPI increase of 3 percent, new urban jobs of over 11M.

- As of March 31, 2022, more than 88 percent of the China population had been fully vaccinated, according to the National Health Commission (NHC).
- As of April 8, Shanghai plans to relax some lockdown restrictions with precise zoning after new round of mass Covid-19 testing. The city's residential compounds, villages and business locations will be classified into three types of zones: lockdown, control and precaution in order to ease the economic situation.
- China will focus on expanding domestic flights and restoring international air travel in 2023-2025, the Civil Aviation Administration of China (CAAC)'s aviation regulator said in January 2022, as it issued a new five-year development plan.
- Hong Kong has reopened borders for passengers arriving from Australia, Canada, France, India, Nepal, Pakistan, Philippines, United Kingdom, and United States and cut the inbound quarantine to seven days. The decision came into effect on April 1, 2022.
- The U.S. Transportation Department has approved China Eastern Airlines' bid to temporarily move the New York to Shanghai flight to Fuzhou Changle International Airport in Fujian province. The 2 times per week flight was moved to Fuzhou from Shanghai due to COVID-19 pandemic control procedures and will be in effect from March 31, 2022 to April 30, 2022.
- China and Greece recently signed a 2022-2024 Joint Action Plan on tourism. The plan focuses on cooperation in tourism, education and training. On March 29, the Mauritius Tourism Promotion Board joined with 16 Mauritius local partners to present its online roadshow to travel operators and partners from different regions in China.

China: Distribution by Island

CHINA (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
O'ahu	88,596	15,167	5,262	2,355	241	876.3%
Maui County	19,743	4,000	1,362	426	69	521.4%
Maui	19,387	3,925	1,311	404	69	490.0%
Moloka'i	718	107	20	12	0	NA
Lāna'i	847	79	62	29	2	1307.0%
Kaua'i	3,781	1,004	437	128	5	2327.6%
Hawai'i Island	34,445	6,412	1,945	742	69	970.8%

China: Group vs. True Independent; Leisure vs. Business

CHINA (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
Group vs True Independent (Net)						
Group tour	16,198	NA	223.0	128	4	2900.4%
True Independent (Net)	45,857	NA	4,951.8	2,062	251	723.0%
Leisure vs business						
Pleasure (Net)	80,528	14,405	6,029	2,548	285	792.5%
MCI (Net)	7,246	684	66	91	0	NA
Convention/Conf.	3,544	392	23	58	0	NA
Corp. Meetings	1,158	131	14	12	0	NA
Incentive	2,693	162	38	26	0	NA

China: First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
1st timers (%)	77.7	NA	65.8	73.8	56.0	17.8
Repeaters (%)	22.3	NA	34.2	26.2	44.0	-17.8

Tax Revenue

CHINA (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
State tax revenue generated* (\$ Millions)	28.34	NA	2.12	0.80	0.14	476.6%

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