



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 July 2022 Quick Facts¹

Visitor Expenditures:	\$18.2 million
Primary Purpose of Stay:	Pleasure (5,844) vs. MCI (288)
Average Length of Stay:	8.26 days
First Time Visitors:	68.7%
Repeat Visitors:	31.3%

CHINA (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD July 2022P	YTD July 2021	% Change YTD
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	NA	18.2	7.7	134.4%
Visitor Days	737,950	151,110	70,468	NA	52,699	24,215	117.6%
Arrivals	92,082	15,878	6,686	NA	6,378	2,208	188.8%
Average Daily Census	2,022	413	193	NA	249	114	117.6%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	NA	344.4	319.8	7.7%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	NA	2,845.7	3,506.9	-18.9%
Length of Stay (days)	8.01	9.52	10.54	NA	8.26	10.96	-24.6%

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

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¹ 2022 visitor data are preliminary. 2021, 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, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or have a negative COVID pre-travel test. The Safe Travels Program ended on March 26, 2022. In July 2022, there were no travel restrictions for passengers arriving to Hawai'i on domestic direct flights from the U.S. Mainland, or for passengers arriving on direct international flights.

- Through the first seven months of 2022, there were 6,378 visitors from China, compared to 61,703 visitors in the first seven months of 2019.
- There have been no direct flights from China to Hawai'i since service ended in early February 2020. There were 277 flights with 75,680 seats in the first seven months of 2019.
- For all of 2021, 6,686 visitors arrived from China. In comparison, there were 15,878 visitors (-57.9%) from China in 2020, and 92,082 visitors (-92.7%) 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 year-to-date June 2022 GDP stood at 56.26 trillion yuan (US\$8.35 trillion), up 2.5 percent versus last year, per National Bureau of Statistics (NBS). China's 2022 Quarter 2 GDP stood at 29.24 trillion yuan (US\$4.34 trillion), up 0.4 percent.
- July 2022 month-end (ME) rate for Chinese Yuan (CNY) versus the U.S. dollar (USD) was 6.74, versus June 2022 ME rate of 6.71, versus July 2021 ME rate of 6.46.
- China's annual inflation rate climbed to 2.5 percent in June 2022 from the prior month figure of 2.1 percent according to NBS. This was the highest since July 2020, with food prices rising the most in 21 months as consumption strengthened further following an improvement in COVID-19 situation.
- In June 2022, China's surveyed urban unemployment rate was 5.5 percent, an improvement from 5.9 percent in May 2022. This represents the lowest rate since February 2022, amid continued efforts by the government to revive the momentum of economic recovery by further easing of COVID-curbs.
- As of August 3, 2022, 1.26 billion people have been fully vaccinated, or 89.6 percent of the population. Two doses or more is considered fully vaccinated in China.
- Multiple places, including Beijing and Shanghai, have started inter-regional recognition of COVID-19 test results as the Chinese central government urged regional authorities to improve test data sharing between each other to enhance the convenience of the public to travel and reduce the impact of epidemic prevention on economic development.
- China's National Immigration Administration (NIA) will continue to adjust and improve entry-and-exit control measures in line with the changing COVID-19 situation to fully meet people's

necessary need for cross-border travel. The Immigration Administration work will also continue to facilitate enterprises' production and operation to promote the country's opening-up, as well as international exchanges and cooperation.

- Outbound international passenger flights from China are likely to grow by more than 200 percent month-on-month in August 2022, industry data showed recently, as China continued to relax travel restrictions. Flights to the U.S. in particular are predicted to soar four times, the data showed. A total of 2,845 outbound international flights are scheduled to operate in August 2022, up from 904 flights in July.
- The 2022 China International Travel Mart (CITM) kicked off on July 22 in Kunming, capital of southwest China's Yunnan Province, after a hiatus of one year due to the COVID-19 epidemic. Exhibitors from 71 countries and regions attended the event online or offline, and officials from embassies and consulates of 31 countries have also joined the expo.

Distribution by Island

CHINA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
O'ahu	88,596	15,167	5,526	5,341	1,853	188.3%
Maui County	19,743	4,000	1,400	1,191	444	168.2%
Maui	19,387	3,925	1,349	1,138	429	165.1%
Moloka'i	718	107	20	42	10	337.6%
Lāna'i	847	79	62	67	24	178.2%
Kaua'i	3,781	1,004	438	330	126	161.7%
Hawai'i Island	34,445	6,412	1,980	1,873	606	209.0%

Group vs. True Independent; Leisure vs. Business

CHINA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
Group vs True Independent (Net)						
Group tour	16,198	NA	222	313	52	506.6%
True Independent (Net)	45,857	NA	5,289	4,783	1,734	175.8%
Leisure vs business						
Pleasure (Net)	80,528	14,405	6,276	5,844	2,082	180.7%
MCI (Net)	7,246	684	69	288	19	1417.4%
Convention/Conf.	3,544	392	23	206	4	4756.1%
Corp. Meetings	1,158	131	14	25	3	694.3%
Incentive	2,693	162	40	78	13	514.9%

First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
1st timers (%)	77.7	NA	65.7	68.7	62.3	6.4
Repeaters (%)	22.3	NA	34.3	31.3	37.7	-6.4

Tax Revenue

CHINA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	2.11	0.90	132.9%

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