



CHINA

China Market Outlook

HTA Tourism Conference
12.9.2022

Dennis Suo

Managing Director

The
HAWAIIAN
ISLANDS

虎啸祥瑞
如虎添翼

Aloha
2022



2022 RECAP

HAWAII TOURISM™
CHINA

An aerial photograph of the Hawaiian Islands, showing several islands of varying sizes and shapes, some with green vegetation and others appearing more barren. The islands are set against a deep blue ocean with white-capped waves. The text 'HAWAII TOURISM' is centered over the image, with a horizontal line passing through the middle of the letters. Below this line, the word 'CHINA' is written in a smaller, white, sans-serif font.

HAWAII TOURISM

CHINA

MARKET OUTLOOK

GENERAL ECONOMY

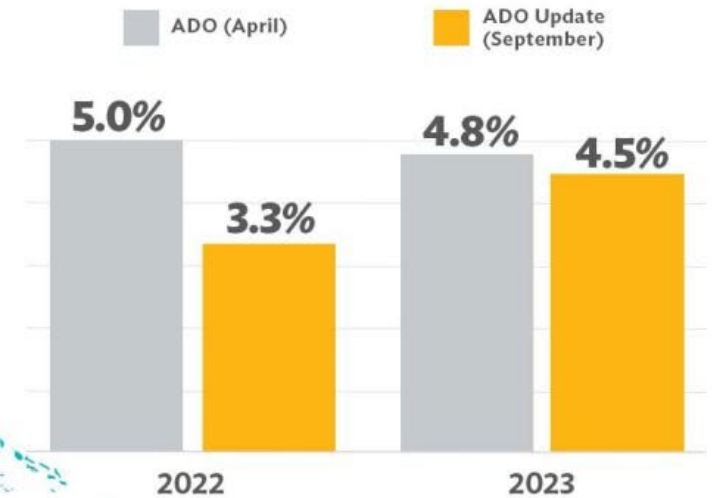
- **CNY vs. USD**
7.17 vs. 6.39 LY, -12% (Nov 2022)
- **GDP**
+3.3% in 2022, +4.5% in 2023
- **Urban Unemployment Rate**
5.5% vs. 5% LY (Oct 2022)
- **Annual Inflation Rate**
2.5% vs. 2.7% LY (Oct 2022)

GDP Growth Forecast



Find out more in ADB's Asian Development Outlook Update 2022
www.adb.org/outlook

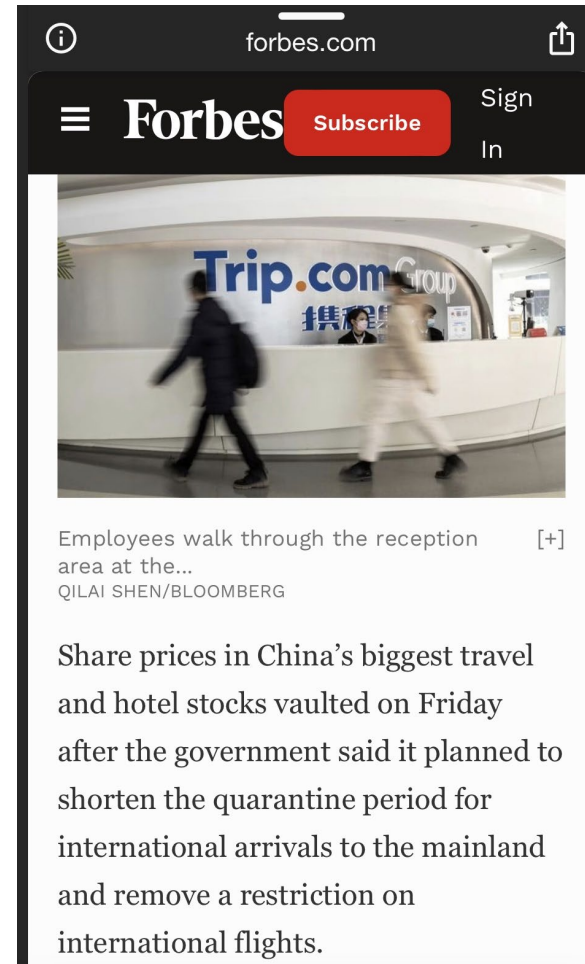
People's Republic of China



#ADO2022

TRAVEL RESTRICTIONS

- **09.26.22** lifted ban for international flights, cuts quarantines to 0 days (HK)
- **11.11.22** Cuts quarantines from 14 to 5 days; minimizes the contact-tracing regime; ends international flight ban
- **2023-2025** Expansion domestic flights & restoration of international air travel

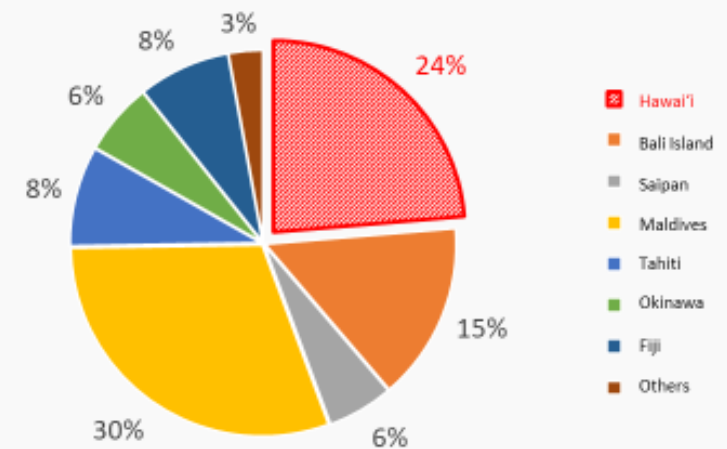
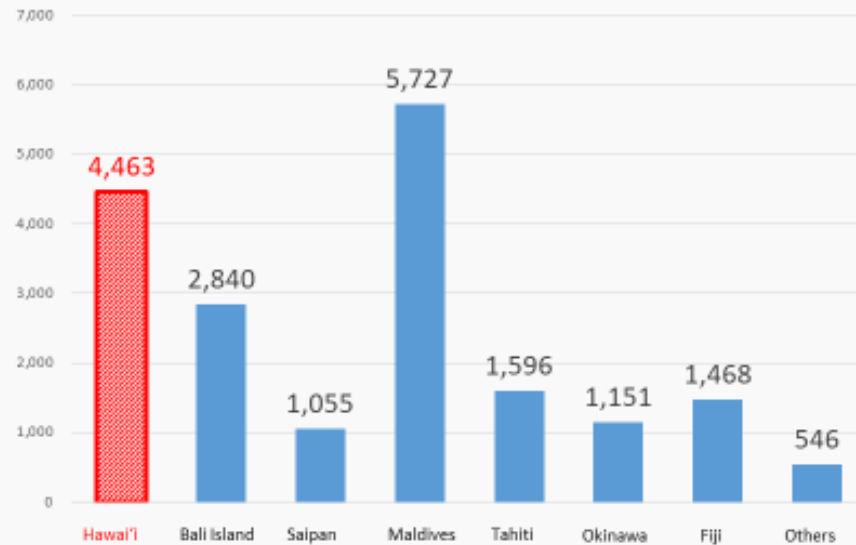


CONSUMER TRAVEL SENTIMENT

72% to travel abroad, beach vacation & natural scenery

- Ranked **#2** island resort destination, #1 Maldives, # 3 Bali
- Spiritual and well-being experiences
- Moving away from functional travel to experiential travel

Q7: If tourism is open after the pandemic, which is your most desired overseas Island destination in the next 12 months? (single choice question)



Among the overseas island destinations most wanted by the respondents in the next 12 months, Hawaii ranks second only to Maldives, accounting for 24%. Users have a good impression and travel intention of Hawai'i.

TRAVEL TRADE TRENDS

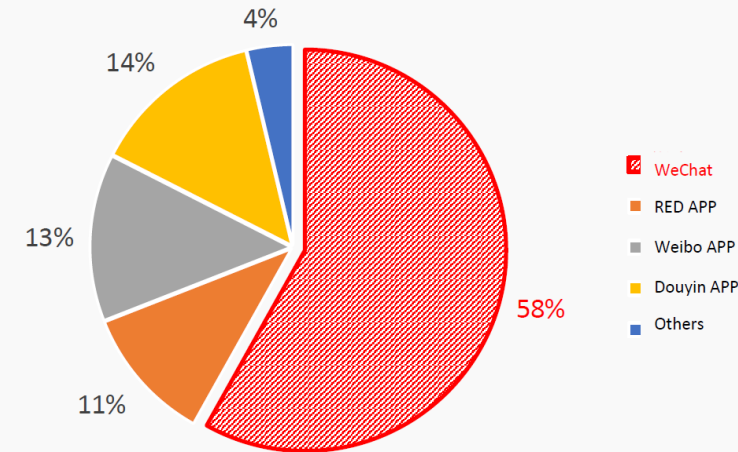
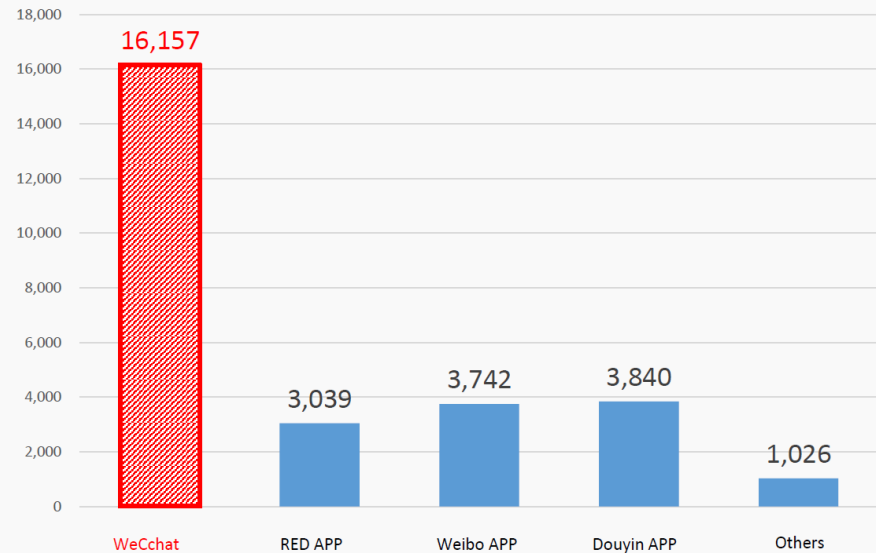
- Digital channels - travel inspiration across generations
- OTA still the preferred booking channel (Trip.com/Tuniu/LY)
- User generated content (UGC) platforms are prevalent with travel content (Mafengwo)
- Travel trade online webinar



MEDIA TRENDS

- WeChat, RED, Mafengwo are main source of social media travel content
- High engagement rate with video and live stream formats vs. text and image content
- Rising trend in rediscovery and modernization of traditional Chinese culture (Guochao)

Q10: Which social media do you usually use to show your journey?
(multiple choice question)



Most of the respondents prefer to use WeChat to share their journey, accounting for 58%. The distribution of other APPs including RED APP, Weibo APP and Douyin APP for users' journey sharing preferences is relatively average.

AIR CAPACITY

- **24** flights weekly China ↔ U.S.
- 4 Chinese & 3 U.S. carriers (reciprocity)
- Connecting flights via Japan & Korea

China - U.S. Flights

Direct Flights:

United Airlines	UA858	Shanghai (PVG) - San Francisco (SFO)	MON / THU / SAT / SUN
Delta Air Lines	DL288	Shanghai (PVG) - Seattle (SEA)	THU / SAT
Delta Air Lines	DL284	Shanghai (PVG) - Detroit (DTW)	WED / SUN
American Airlines	AA128	Shanghai (PVG) – Dallas (DFW)	TUE / FRI
Air China	CA987	Beijing (PEK) - Los Angeles (LAX)	SUN
Air China	CA769	Shenzhen (SZX)- Los Angeles (LAX)	TUE
China Eastern Airlines	MU587	Shanghai (PVG) - New York (JFK)	TUE
China Southern Airlines	CZ327	Guangzhou (CAN) - Los Angeles (LAX)	THU / SAT
Xiamen Airlines	MF829	Xiamen (XMN) - Los Angeles (LAX)	WED / SUN

(These schedules are subject to change)



COMPETITION

- Long haul landscape in 2019
18M Europe **2.9M** US **1.5M** California
1.4M Australia **1M** Dubai **1.2M** Bali
300K Maldives
- Brand USA & Visit California (LATCB, SFT) joint live stream on Ctrip.com
- Switzerland roadshow in **9** Chinese cities
- Qatar Airways & Tourism leverage FIFA World Cup with destination campaign

California dream Big SAN FRANCISCO USA

旧金山最后一站去怎么玩?
去著名的「渔人码头」, 逛逛最热闹的集市。还有「最窄、最陡、最弯」的「九曲花街」。

12月9日8:30来我直播间, 我们不见不散

California dream Big Los Angeles USA

你知道洛杉矶人最喜欢的「农夫市场」吗?
不仅有加州地道蔬果, 还有各国美食和纪念品

12月22日9:00来我直播间, 带你云游「农夫市场」!!

12月22日9:00准时开播
携程直播 长按识别二维码 直达直播现场

如此瑞士

< Back Weibo Content

卡塔尔航空公司
22-11-24 00:00 from 微...
发布于北京

卡航空之家的FIFA球迷节为观赛旅客带来更多精彩活动, 内马尔互动挑战、即兴足球表演、卡航商务舱QVerse虚拟之旅、面部彩绘、自由滑雪等你来体验! 这里有足球、音乐和无尽欢乐, 快和卡航一起燃情世界杯! #卡塔尔世界杯# 卡塔尔航空公司的微博视频

SO SWISS!

OFFICIAL AIRLINE of the JOURNEY

“如此瑞士”快闪周

时间: 11月18日 (周五) -11月27日 (周日)
地点: 上海市虹口区“今朝8弄”
上海市虹口区四川北路武进路路口

CHALLENGES & OPPORTUNITIES

CHALLENGES:

- Dynamic zero-covid approach
- Non-stop flight
- Geo-political uncertainties

OPPORTUNITIES:

- Mobile digital infrastructure
- Integrated social marketing
- Travel trade & U.S. Embassy Beijing
- Pent-up demand and unspent travel budget
- Stimulus to boost economy
- Hawaiian Airlines (Charter)
- California forecasts 1.5m visitors in 2025-2026



WeChat B2C
mini program



WeChat B2B
mini program



WeChat
official
account



Weibo
official
account

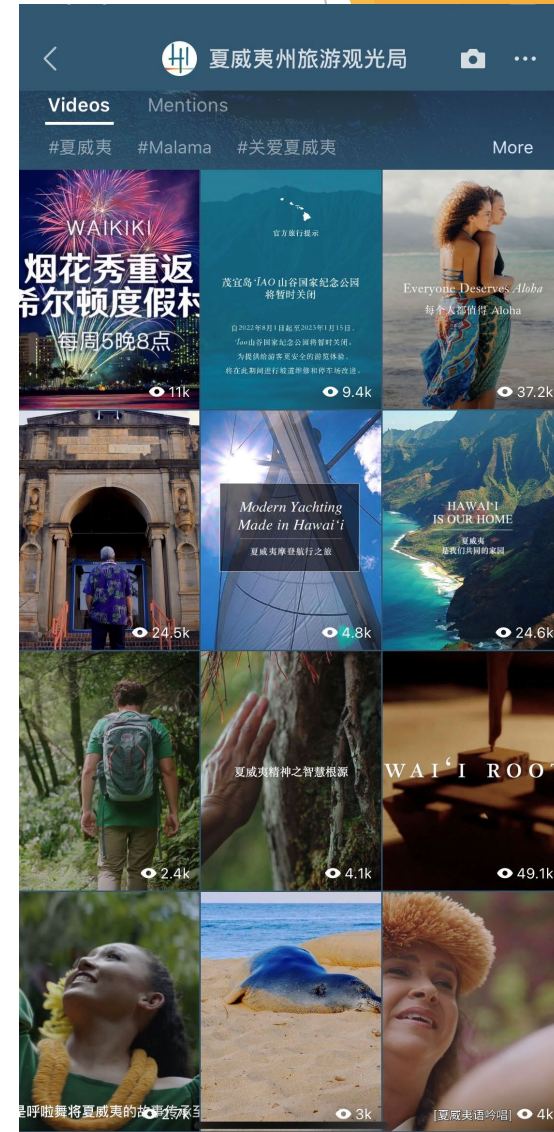


Red official
account



抖音官方号
86640526532

Douyin
official
account





HAPPY CHINESE NEW YEAR
2023
YEAR OF THE RABBIT

Mahalo 谢谢

HAWAII TOURISM™
CHINA