



# China Fact Sheet

## China Overview

The Hawai'i Tourism Authority selected TRAVLOCAL LIMITED for Brand Marketing and Management Services in China. The China market continues to lead in per person per day spending among all major source markets for Hawai'i. In 2024, Hawai'i Tourism China (HTC) will continue to focus on digital and social media marketing and leverage partnerships in travel trade events and roadshows across China to elevate Hawai'i's image and brand awareness and promote responsible and mindful travel.

## Year-to-Date September 2024 Quick Facts<sup>1/</sup>

Visitor Expenditures: \$28.0 million  
 Primary Purpose of Stay: Pleasure (9,854) vs. MCI (615)  
 Average Length of Stay: 7.17 days  
 First Time Visitors: 61.2%  
 Repeat Visitors: 38.8%

CHINA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Sep. 2024P <sup>1</sup>	YTD Sep. 2023	% Change
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	39.6	101.5	NA	28.0	79.7	-64.9%
Visitor Days	737,950	151,110	70,468	116,043	287,464	NA	80,086	215,413	-62.8%
Arrivals	92,082	15,878	6,686	13,771	33,966	NA	11,170	24,980	-55.3%
Average Daily Census	2,022	413	193	318	788	NA	292	789	-63.0%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	341.3	353.0	NA	349.9	370.1	-5.5%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,876.2	2,987.2	NA	2,508.6	3,191.6	-21.4%
Length of Stay (days)	8.01	9.52	10.54	8.43	8.46	NA	7.17	8.62	-16.9%

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

## Contact Information

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<sup>1/</sup> 2024P 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 DIIO Mi Airline database, data from the NTTO and final passenger counts from Airline Traffic Summary reports.

## Market Summary

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- In the first nine months of 2024, 11,170 visitors arrived from China and visitor spending was \$28.0 million. It should be noted that 2024 data are preliminary and under-reported, pending final immigration reports from the National Travel and Tourism Office. There were 24,980 visitors in the first nine months of 2023 and visitor spending was \$79.7 million. In the first nine months of pre-pandemic 2019, 75,805 visitors arrived from this market and visitor spending was \$199.1 million.
- In 2023, there were 33,966 visitors from China, compared to 13,771 visitors (+146.6%) in 2022. There were 92,082 visitors (-63.1%) in 2019.
- Visitors from China spent \$101.5 million in 2023, compared to \$39.6 million (+156.2%) in 2022 and \$242.8 million (-58.2%) in 2019. Daily visitor spending in 2023 was \$353 per person, higher than 2022 (\$341 per person, +3.4%) and 2019 (\$329 per person, +7.3%).
- 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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- As of September 2024, the month-end (ME) exchange rate for the Chinese Yuan (CNY) against the USD was 7.00, compared to 7.13 in August 2024 and 7.17 in September 2023.
- The annual inflation rate in China is projected to be 0.4 percent for September 2024, down from 0.6 percent in August 2024 and up from 0.2 percent in September 2023.
- The unemployment rate in China for August 2024 was recorded at 5.3 percent year-over-year, a slight increase from the previous month's rate of 5.2 percent.
- According to the 2024 China National Day Holiday Travel report, long-term travel has emerged as the predominant trend for National Day holiday bookings, with outbound travel tickets and hotel reservations significantly surpassing those from the same period last year. Recent data from Feizhu indicates that bookings for overseas car rentals have surged by over 150 percent year-on-year, while cruise bookings have increased by nearly 600 percent year-on-year.
- Tourism ministers from China, Japan, and South Korea met in Japan to strengthen cultural and tourism collaboration. They established a new target to increase mutual tourist exchanges among the three countries to 40 million by 2030. This marks the tenth session of the Tripartite Tourism Ministers' Meeting, which was initiated in 2006 and resumed after a five-year hiatus due to the pandemic. The 2030 target represents an increase of 10 million tourists compared to pre-pandemic levels.
- As of March 31, 2024 the FAA has authorized Chinese mainland airlines to operate 50 round-trip flights per week between China and the United States. In parallel, US airlines can apply for 50 weekly direct flights to mainland China. Airlines are not permitted to alter flight origins, destinations, dates, or the number of flights without prior application. Currently, Chinese mainland airlines have fully utilized all 50 round-trip flight slots. However, the number of flights between China and the United States remains significantly lower than pre-pandemic levels, and the recovery rate is lagging behind that of Asian and European countries.

## Distribution by Island

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Sep. 2024P <sup>1</sup>	YTD Sep. 2023	% Change
O'ahu	88,596	15,167	5,526	11,711	31,728	9,721	23,275	-58.2%
Maui County	19,743	4,000	1,400	3,023	5,358	1,556	4,619	-66.3%
Maui	19,387	3,925	1,349	2,889	5,232	1,451	4,549	-68.1%
Moloka'i	718	107	20	86	78	35	22	55.8%
Lāna'i	847	79	62	157	75	108	66	64.4%
Kaua'i	3,781	1,004	438	911	2,664	660	2,036	-67.6%
Hawai'i Island	34,445	6,412	1,980	4,148	10,071	3,085	7,259	-57.5%

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

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Sep. 2024P <sup>1</sup>	YTD Sep. 2023	% Change
Group vs True Independent (Net)								
Group Tour	16,198	NA	222	773	2,058	1,039	1,539	-32.5%
True Independent (Net)	45,857	NA	5,289	10,078	21,297	7,553	15,315	-50.7%
Leisure vs Business								
Pleasure (Net)	80,528	14,405	6,276	12,745	29,386	9,854	21,531	-54.2%
MCI (Net)	7,246	684	69	488	2,909	615	2,360	-74.0%
Convention/Conf.	3,544	392	23	317	1,921	421	1,444	-70.9%
Corp. Meetings	1,158	131	14	41	598	38	582	-93.4%
Incentive	2,693	162	40	154	400	159	342	-53.5%

## First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Sep. 2024P <sup>1</sup>	YTD Sep. 2023	% Change
First Time Visitors (%)	77.7	NA	65.7	63.7	63.9	61.2	62.0	-0.8
Repeat Visitors (%)	22.3	NA	34.3	36.3	36.1	38.8	38.0	0.8

## Tax Revenue

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Sep. 2024P <sup>1</sup>	YTD Sep. 2023	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	4.59	11.77	3.25	9.25	-64.9%

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