



# 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 October 2024 Quick Facts<sup>1/</sup>

Visitor Expenditures: \$34.3 million  
 Primary Purpose of Stay: Pleasure (11,928) vs. MCI (754)  
 Average Length of Stay: 7.17 days  
 First Time Visitors: 61.8%  
 Repeat Visitors: 38.2%

	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Nov. 2024P <sup>1/</sup>	YTD Nov. 2023	% Change
CHINA (by Air)									
Visitor Expenditures* (\$ Millions)	242.8	NA	22.4	39.6	101.5	NA	34.3	94.0	-63.5%
Visitor Days	737,950	151,110	70,468	116,043	287,464	NA	96,790	251,071	-61.4%
Arrivals	92,082	15,878	6,686	13,771	33,966	NA	13,508	29,379	-54.0%
Average Daily Census	2,022	413	193	318	788	NA	289	752	-61.6%
Per Person Per Day Spending* (\$)	329.0	NA	317.8	341.3	353.0	NA	354.6	374.2	-5.3%
Per Person Per Trip Spending* (\$)	2,636.6	NA	3,349.0	2,876.2	2,987.2	NA	2,540.4	3,198.1	-20.6%
Length of Stay (days)	8.01	9.52	10.54	8.43	8.46	NA	7.17	8.55	-16.2%

\*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 11 months of 2024, 13,508 visitors arrived from China and visitor spending was \$34.3 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 29,379 visitors in the first 11 months of 2023 and visitor spending was \$94.0 million. In the first 11 months of pre-pandemic 2019, 85,102 visitors arrived from this market and visitor spending was \$224.2 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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- In November 2024, the month-end exchange rate for the Chinese Yuan (CNY) against the US Dollar (USD) was 7.19, showing a slight depreciation from the October 2024 month-end rate of 7.13.
- China's Purchasing Managers' Index (PMI) for November 2024 stood at 50.3 percent, which is a modest improvement from October 2024's figure of 50.1 percent. The PMI is a key indicator of economic health in the manufacturing sector, with a reading above 50% signaling expansion.
- China's annual inflation rate in October 2024 was 0.3 percent, which represents a slight increase compared to the same period in the previous year. However, this figure was lower than the 0.4 percent inflation recorded in September 2024.
- China's unemployment rate for October 2024 was 5.0 percent, a slight improvement from the September 2024 figure of 5.1 percent. This decrease indicates a small recovery in the job market.
- On November 12, 2024, Fliggy data revealed that the "Double 11" shopping event saw double-digit growth in sales, with a 40 percent year-over-year increase in trading users. Reservation-based sales surged by nearly 90 percent compared to the previous year. The share of sales for outbound tourism activities grew by 30 percent year-over-year. Popular destinations such as Hong Kong, Japan, Macau, Thailand, South Korea, Malaysia, the US, Singapore, Vietnam, and Australia led consumer orders. Meanwhile, lesser-known destinations like Iceland, Turkey, Cambodia, Fiji, and France experienced the fastest growth.
- Outbound Chinese travelers are projected to reach 130 million in 2024, up from 101 million in 2023, with continued growth expected. While Beijing's September stimulus package did not impact October's Golden Week travel, it is boosting consumer spending and signaling a rebound in outbound tourism. Although Chinese tourism has not fully recovered to pre-pandemic levels, the outlook is positive due to rising incomes and a consumption-driven economy increase spending on travel.

## Distribution by Island

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Nov. 2024P <sup>1</sup>	YTD Nov. 2023	% Change
O'ahu	88,596	15,167	5,526	11,711	31,728	11,767	27,426	-57.1%
Maui County	19,743	4,000	1,400	3,023	5,358	1,874	5,131	-63.5%
Maui	19,387	3,925	1,349	2,889	5,232	1,761	5,014	-64.9%
Moloka'i	718	107	20	86	78	37	74	-49.9%
Lāna'i	847	79	62	157	75	122	69	76.5%
Kaua'i	3,781	1,004	438	911	2,664	804	2,463	-67.4%
Hawai'i Island	34,445	6,412	1,980	4,148	10,071	3,670	8,795	-58.3%

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

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Nov. 2024P <sup>1</sup>	YTD Nov. 2023	% Change
Group vs True Independent (Net)								
Group Tour	16,198	NA	222	773	2,058	1,423	1,778	-19.9%
True Independent (Net)	45,857	NA	5,289	10,078	21,297	8,988	18,703	-51.9%
Leisure vs Business								
Pleasure (Net)	80,528	14,405	6,276	12,745	29,386	11,928	25,440	-53.1%
MCI (Net)	7,246	684	69	488	2,909	754	2,660	-71.7%
Convention/Conf.	3,544	392	23	317	1,921	504	1,714	-70.6%
Corp. Meetings	1,158	131	14	41	598	66	590	-88.9%
Incentive	2,693	162	40	154	400	188	366	-48.8%

## First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Nov. 2024P <sup>1</sup>	YTD Nov. 2023	% Change
First Time Visitors (%)	77.7	NA	65.7	63.7	63.9	61.8	62.2	-0.4
Repeat Visitors (%)	22.3	NA	34.3	36.3	36.1	38.2	37.8	0.4

## Tax Revenue

CHINA (by Air)	2019	2020	2021	2022	2023	YTD Nov. 2024P <sup>1</sup>	YTD Nov. 2023	% Change
State tax revenue generated* (\$ Millions)	28.34	NA	2.61	4.59	11.77	3.98	10.90	-63.5%

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