



## 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 April 2022 Quick Facts<sup>1</sup>

Visitor Expenditures:	\$8.9 million
Primary Purpose of Stay:	Pleasure (3,081) vs. MCI (103)
Average Length of Stay:	7.96 days
First Time Visitors:	70.0%
Repeat Visitors:	30.0%

CHINA (by Air)	2019	2020	2021P	2022 Annual Forecast	YTD Apr. 2022P	YTD Apr. 2021P	% Change YTD
Visitor Expenditures* (\$ Millions)	242.8	NA	18.2	NA	8.9	1.6	449.9%
Visitor Days	737,950	151,110	63,065	NA	26,236	5,620	366.8%
Arrivals	92,082	15,878	6,348	NA	3,296	466	607.4%
Average Daily Census	2,022	413	173	NA	219	47	366.8%
Per Person Per Day Spending* (\$)	329.0	NA	288.5	NA	339.8	288.4	17.8%
Per Person Per Trip Spending* (\$)	2,636.6	NA	2,866.3	NA	2,704.7	3,479.4	-22.3%
Length of Stay (days)	8.01	9.52	9.93	NA	7.96	12.06	-34.0%

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

### Contact Information

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<sup>1</sup> 2022 and 2021 visitor data are preliminary. 2020 and 2019 visitor data are the final numbers and reflect updated airfare statistics from DIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

## Market Summary

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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 April 2022, there were no travel restrictions for passengers arriving on U.S. domestic flights. Passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included up-to-date vaccination document and a negative COVID test taken within one day of travel, or documentation of having recovered from COVID in the past 90 days.

- Through the first four months of 2022, there were 3,296 visitors from China, compared to 35,791 visitors in the first four months of 2019.
- There have been no direct flights from China to Hawai'i since service ended in early February 2020. There were 160 flights with 43,633 seats in the first four months 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

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- April 2022 month-end (ME) rate for Chinese Yuan (CNY) vs. USD was 6.62 vs. 6.34 March 2022 ME rate and April 2021 ME rate of 6.47.
- China's 2022 Q1 GDP stood at 27.02 trillion yuan (US\$4.3 trillion), per National Bureau of Statistics (NBS). Q1 2022 was +4.8% vs Q1 2021 (+18.3% vs. Q1 2020).
- In April 2022, China's manufacturing purchasing managers' Index (PMI) was 47.4, from 49.5 in March, according to the National Bureau of Statistics. The lower reading can be attributed to the lockdowns in April. A reading above 50 indicates an expansion in production.
- In Q1 2022, the unemployment rate was 5.5 percent, 0.1percent higher than the same period last year. The surveyed urban unemployment rate in January and February were 5.3 percent and 5.5 percent respectively, down 0.1 percent and flat compared with the same period last year. In March, the pandemic situation worsened in some regions resulting in the surveyed urban unemployment rate rising to 5.8 percent, 0.3 percent higher than the previous month.
- As of April 30, 2022, more than 88.5 percent of the population had been fully vaccinated, according to the National Health Commission (NHC).
- In early May 2022, the Beijing government eased quarantine management measures for those whose port of entry is Beijing. The measure will be a "10-day concentrated quarantine + 7-day home quarantine" vs. the previous policy of a "14-day concentrated quarantine + 7-day home quarantine".

- Shenzhen has lifted a week-long lockdown with public transport back up and most businesses and factories back to work. Several cities, collectively home to more than 37 million residents, were placed under varying levels of lockdown in March. Many of those lockdowns eased by early April.
- Shanghai begins to ease some of its week's long shutdown with about 6.6 million residents' population being able to go outdoors.
- 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.
- 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.
- The new Zhanjiang Wuchuan Airport opened on March 24, 2022, replacing the Zhanjiang Airport. It is the region's first 4E as well as a national A class airport open to international traffic and satisfies the full-load takeoff and landing of all kinds of large aircraft. It can serve a population of more than 20 million in western Guangdong and part of Guangxi Zhuang Autonomous Region.
- Fiji Tourism has launched a new marketing campaign with Hollywood actor Rebel Wilson in the Chinese market following the opening of Fiji's international borders. Fiji has officially announced that it will provide quarantine free travel to tourists from China, Hong Kong, Macao and Taiwan who have been fully vaccinated.

## China: Distribution by Island

CHINA (by Air)	2019	2020	2021P	YTD Apr. 2022P	YTD Apr. 2021P	% Change YTD
O'ahu	88,596	15,167	5,262	2,849	370	669.3%
Maui County	19,743	4,000	1,362	514	111	364.1%
Maui	19,387	3,925	1,311	488	111	340.8%
Moloka'i	718	107	20	17	0	NA
Lāna'i	847	79	62	38	2	1766.7%
Kaua'i	3,781	1,004	437	149	18	735.2%
Hawai'i Island	34,445	6,412	1,945	914	100	817.3%

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

CHINA (by Air)	2019	2020	2021P	YTD Apr. 2022P	YTD Apr. 2021P	% Change YTD
Group vs True Independent (Net)						
Group tour	16,198	NA	223.0	157	8	1747.6%
True Independent (Net)	45,857	NA	4,951.8	2,517	386	551.6%
Leisure vs business						
Pleasure (Net)	80,528	14,405	6,029	3,081	433	612.2%
MCI (Net)	7,246	684	66	103	2	4784.8%
Convention/Conf.	3,544	392	23	69	2	3161.4%
Corp. Meetings	1,158	131	14	17	0	NA
Incentive	2,693	162	38	32	0	NA

## China: First Timers vs. Repeat Visitors

CHINA (by Air)	2019	2020	2021P	YTD Apr. 2022P	YTD Apr. 2021P	% Change YTD
1st timers (%)	77.7	NA	65.8	70.0	53.1	16.8
Repeaters (%)	22.3	NA	34.2	30.0	46.9	-16.8

## Tax Revenue

CHINA (by Air)	2019	2020	2021P	YTD Apr. 2022P	YTD Apr. 2021P	% Change YTD
State tax revenue generated* (\$ Millions)	28.34	NA	2.12	1.03	0.19	446.5%

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