



# China Fact Sheet

## China Overview

The outlook for China's outbound travel to the United States remains positive, supported by continued collaboration between Chinese and U.S. tourism organizations to improve connectivity, streamline travel planning, and rebuild traveler confidence. Hawai'i Tourism China (HTC) continues to strengthen Hawai'i's brand presence in the China market through integrated digital and social media marketing, while promoting responsible and regenerative tourism experiences aligned with Hawai'i's long-term tourism vision.

## Year-to-Date February 2026 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$25.6 million
Primary Purpose of Stay:	Pleasure (8,228) vs. MCI (182)
Average Length of Stay:	8.00 days
First Time Visitors:	70.8%
Repeat Visitors:	29.2%

CHINA (by Air)	2020	2021	2022	2023	2024	2025P	2026 Annual Forecast	YTD Feb. 2026P	YTD Feb. 2025P	% Change
Visitor Expenditures* (\$ Millions)	NA	22.4	39.6	101.5	147.2	133.0	NA	25.6	30.7	-16.6%
Visitor Days	151,110	70,468	116,043	287,464	416,557	386,272	NA	69,711	97,667	-28.6%
Arrivals	15,878	6,686	13,771	33,966	51,579	47,309	NA	8,712	11,649	-25.2%
Average Daily Census	413	193	318	788	1,138	1,058	NA	1,182	1,655	-28.6%
Per Person Per Day Spending* (\$)	NA	317.8	341.3	353.0	353.5	344.2	NA	367.1	314.3	16.8%
Per Person Per Trip Spending* (\$)	NA	3,349.0	2,876.2	2,987.2	2,854.8	2,810.7	NA	2,937.9	2,634.8	11.5%
Length of Stay (days)	9.52	10.54	8.43	8.46	8.08	8.16	NA	8.00	8.38	-4.6%

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions  
<sup>1/</sup>Dept. of Business, Economic Development & Tourism (DBEDT) 2026 forecasts were not available.

## Contact Information

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<sup>1/</sup> 2026P and 2025P visitor data are preliminary. 2020 – 2024 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, APIS I-94 data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

<sup>2/</sup> Due to limited data, Moloka'i and Lāna'i visitor statistics were not reported for February 2026. Total arrivals statewide, arrivals to O'ahu, Maui, Kaua'i and Hawai'i Island and arrivals by visitor markets were not affected. Year-to-Date 2026 Visitor spending, visitor days, length of stay and average daily census data did not include those who visited Moloka'i and Lāna'i.

## Market Summary

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- In the first two months of 2026, 8,712 visitors arrived from China by air service, total visitor spending was \$25.6 million and daily spending was \$367 per person. In the first two months of 2025, 11,649 visitors arrived from China by air, total visitor spending was \$30.7 million and daily spending was \$314 per person.
- In 2025, 47,309 visitors arrived from China by air service, total visitor spending was \$133.0 million and daily spending was \$344 per person.
- There have been no direct flights from China to Hawai'i since service ended in early February 2020.

## Market Conditions (Updated Quarterly)

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- The Chinese Yuan (RMB) hovered around the 7.00 per USD psychological mark throughout January 2026, showing managed stability after a strong finish to 2025. In mid-January 2026, the People's Bank of China implemented targeted easing, reducing interest rates on structural monetary policy tools by 25 basis points to support Small and Medium-sized Enterprises and the tech sector, while remaining cautious of excessive currency swings and capital flight risks.
- The Consumer Price Index (CPI) rose 0.8 percent year-over-year (December 2025 data released in January 2026), largely driven by a weather-related spike in vegetable prices (+18.2%) and pre-holiday stocking, rather than broad-based demand growth. Core CPI remained steady at 1.2 percent, whereas the Producer Price Index (PPI) fell 1.9 percent, signaling ongoing industrial deflation and continued pressure on corporate profit margins.
- Travel consumption continued to perform strongly. During the three-day New Year holiday (January 1–3, 2026), domestic trips reached 142 million, up 5.2 percent year-over-year, while spending rose 6.4 percent to 84.8 billion yuan. The per capita spending increase of 1.1 percent suggests travelers were not only moving more but also spending more.
- On January 28, 2026, the National Immigration Administration held a regular press conference to present key statistics and accomplishments in immigration management for 2025. That year, immigration authorities across the country processed 697 million inbound and outbound passengers, marking a 14.2 percent increase compared with the previous year and setting a new record. Among these, 335 million were mainland residents and 279 million were residents from Hong Kong, Macao, and Taiwan, reflecting year-on-year increases of 15.1 percent and 10.1 percent, respectively. The number of foreign visitors reached 82.035 million, up 26.4 percent from the previous year, with visa-free entries totaling 30.08 million, accounting for 73.1 percent of all foreign visitors and representing a 49.5 percent year-on-year increase.
- COITM recently surveyed hundreds of Chinese travel operators on the “Outlook for China's Outbound Travel Market in 2026 and Operator Demands”:
  - Market Outlook: 46.4 percent of operators expect a steady recovery in 2026, with growth of 0–10 percent, approaching or slightly exceeding 2019 levels. Another 33.3 percent anticipate growth of 10–20 percent. Overall, the industry is cautiously optimistic about continued recovery amid fluctuations.
  - Two customer groups are expected to drive growth: Generation Z (75.6%), seeking personalized, in-depth experiences with cultural and social media appeal, and affluent seniors (67.3%), who value comfort, leisure, and wellness, with strong spending power and flexible travel time.

- Destinations: Popular choices include the Asia-Pacific (South Korea, Southeast Asia, Australia, New Zealand), South Asia, South America, and Central/West Asia. Short-haul travel will remain dominant, but interest in long-haul and niche destinations is rising.

## Distribution by Island

CHINA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P 2/	YTD Feb. 2025P	% Change
O'ahu	15,167	5,526	11,711	31,728	48,861	44,950	8,686	11,364	-23.6%
Maui County	4,000	1,400	3,023	5,358	7,078	7,075	1,498	1,900	-21.1%
Maui	3,925	1,349	2,889	5,232	6,739	6,856	1,364	1,871	-27.1%
Moloka'i	107	20	86	78	196	581	135	13	935.5%
Lāna'i	79	62	157	75	440	834	269	133	102.5%
Kaua'i	1,004	438	911	2,664	2,798	2,672	384	396	-3.1%
Hawai'i Island	6,412	1,980	4,148	10,071	19,056	21,548	3,510	5,097	-31.1%

P=Preliminary data.

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

CHINA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
Group vs True Independent (Net)									
Group Tour	NA	222	773	2,058	2,623	4,354	690	870	-20.7%
True Independent (Net)	NA	5,289	10,078	21,297	33,166	29,845	5,438	8,055	-32.5%
Leisure vs Business									
Pleasure (Net)	14,405	6,276	12,745	29,386	45,022	42,651	8,228	10,472	-21.4%
MCI (Net)	684	69	488	2,909	3,288	2,725	182	809	-77.5%
Convention/Conf.	392	23	317	1,921	2,411	1,984	76	694	-89.0%
Corp. Meetings	131	14	41	598	372	287	0	58	-100.0%
Incentive	162	40	154	400	559	500	106	103	2.7%

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

P=Preliminary data.

## First Timers vs. Repeat Visitors

CHINA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
First Time Visitors (%)	NA	65.7	63.7	63.9	72.3	71.4	70.8	67.4	3.4
Repeat Visitors (%)	NA	34.3	36.3	36.1	27.7	28.6	29.2	32.6	-3.4

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

P=Preliminary data.

## Tax Revenue

CHINA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P 3/	YTD Feb. 2025P	% Change
State tax revenue generated* (\$ Millions)	NA	2.61	4.59	11.77	20.59	18.60	3.58	4.29	-16.6%

<sup>3</sup>State government tax revenue generated (direct, indirect, and induced) for 2024, 2025P; year-to-date 2025P and year-to-date 2026P were calculated using the new Hawai'i Tourism Input-Output model (October 2025) and are not directly comparable to previous years' calculations.