

China Market Update

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2026 Spring Tourism Update



GENERAL ECONOMY



CHINA OUTBOUND

- 01 Mitigation of US/China Trade Tensions
- 02 155m trips (2025), 13% CAGR 2032
- 03 US\$ 159B, +13.5% vs. \$140B in 2024
- 04 Strong CNY (RMB) vs. USD

Market size and CAGR: ResearchAndMarkets.com's "China Outbound Tourism Market and Forecast 2025-2033" (October 10, 2025)



The old engines (property, massive low-end exports, debt-driven construction) are being powered down.



The new engines (EVs, green tech, high-tech manufacturing) are being started up and are getting stronger.



OUTBOUND TRAVEL TRENDS



Visa Ease

- » Visa-free/eVisas expand
- » Gulf, SE, Europe



Mobile Booking

- » Digital savvy (80% mobile bookings)
- » Wellness, sustainable, event and foodie tourism



Event Tourism

- » FIFA World Cup 2026
- » 2028 Summer Olympics



Rethink Shopping

- » Shift from luxury to local, value-driven products
- » Distinctive quality, lifestyle appeal



AI

- » AI tools (e.g., TripGenie) dominate
- » Itinerary design



Potential

- » Top U.S. destination **(+46%)** YoY interest growth)
- » **10M** U.S. visa holders; Millennials/Gen Z

COMPETITIVE LANDSCAPE

Chinese Outbound Travel Forecast: 2026 vs. 2025

(All figures in millions of travelers)

DESTINATION	2025 Actual / Estimate	Recovery vs. 2019	KEY DRIVERS (Updated)	Growth % (2026 vs 2025)
United States	~1.8 – 2.0 m	~60–65%	Slow visa processing and limited air capacity; long-haul FIT interest	+10–18%
Europe	~10 – 11 m	100%+	Schengen visa ease, luxury shopping, viral destinations (Norway, Iceland, Spain)	+12–20%
Middle East	~2.5 – 2.7 m	100%+	UAE & other visa-free policies, Saudi tourism push, and sharp decline in March due to Iran war	-30 to -40%
Australia	~1.05 – 1.1 m	~70–75%	Student travel, improved flight capacity, long-haul appeal	+15–25%
New Zealand	~0.35 – 0.4 m	~75–80%	Adventure & eco-tourism niche	+20–30%
Maldives	~0.28 – 0.30 m	120%+	Visa-free access, Instagrammable luxury resorts	+8–12%
Japan	9.1 m	100%+ (early peak)	Strong cultural appeal and shopping in first 10 months; sharp decline from Nov onward due to diplomatic tensions	-35% to -45%
S. Korea	~5.5 – 6.0 m	80%+	K-pop/drama tourism, short-haul ease & visa waivers	+15–25%

HAWAII STAYS WITH YOU CAMPAIGN – Q1



Platforms

WeChat, RedBook, Weibo, Douyin



Impressions

Total impressions: 390,726



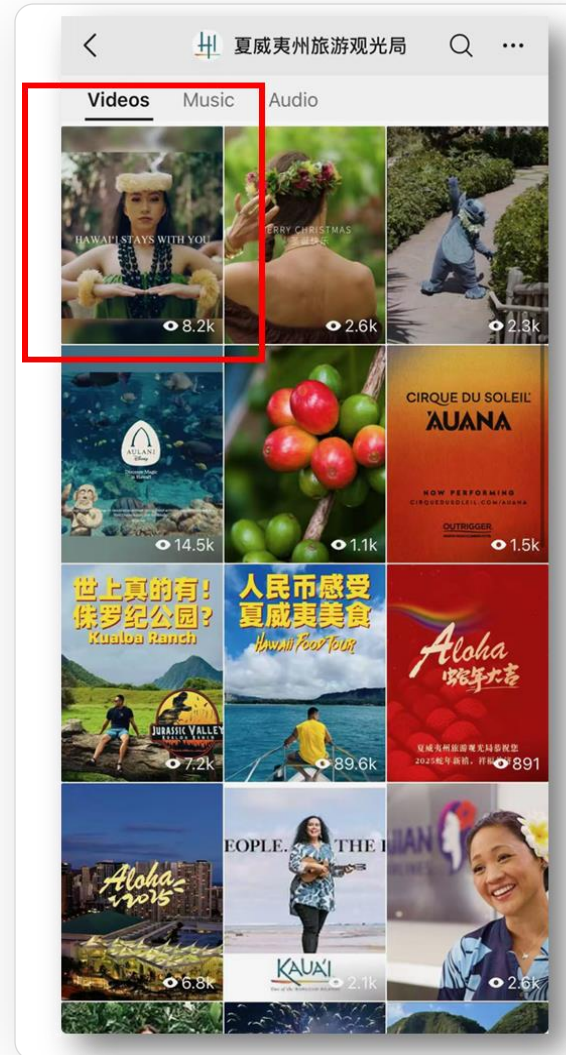
Travel Trade

Reach: Over 580 travel agent representatives



Tactics

Social media feature, offline showcase



数据分析

更多数据



世上再无一处如我们的夏威夷，这里独特的风味美食，与大地血脉相连的...

2026年01月15日 00:00

数据诊断 ①

截至02月13日 06:00，当前视频总播放量为8020，播放量超过84.79%的同类视频。

更多诊断信息 ˅

播放数据 ①

同类对比 往期对比

播放量 8246 高 超过84.79%的同类视频

平均播放时长 15.07秒 高 超过71.37%的同类视频

视频的3s以上播放率排名低于同类视频，建议优化视频前3s内容，增强视频对观众的吸引力。

TRAVEL TRADE EDUCATION – Q1

- 01 “Best of the U.S.” roadshow in Hunan in January
- 02 150+ travel professionals specializing in North American tourism
- 03 Strengthened Hawai‘i’s presence in Hunan’s outbound travel sector



- 01 AITS Discover North America 2026 roadshow in Nanjing, Suzhou and Hangzhou in March
- 02 Conducted 3 sessions and more than 450 attendees
- 03 Focused on partnerships, development, and product planning



SOCIAL MARKETING – Q1

TOTAL 42 POSTS, 910k+ IMPRESSIONS, 4 PLATFORMS (2026 YTD MAR)

“热爱海滩的数字游民，
都会爱上北岸的日落海滩美景
和悠闲松弛的小镇氛围。”

驱车从檀香山前往北岸大约45分钟，
如果从机场出发，只需35分钟，
便可到达哈雷瓦小镇。



当你渐近传说中的冲浪小镇—哈雷瓦镇，
路边那个显眼的标志牌便是热门的拍照打卡点，
它被视为北岸的象征。
停下车先拍个照……



浮潜初体验

夏威夷纯净清澈的海水与丰富的海洋生物，
使其成为当之无愧的浮潜胜地。



haleiwa town



漫步在棕榈掩映的哈雷瓦镇，
每一家咖啡馆都像一位老朋友，
用一杯手冲、一块现烤派点，
诉说着属于夏威夷的Aloha故事……



火山口牵手，
等待地球苏醒的瞬间

清晨，基拉韦厄火山口雾气缭绕，熔岩泛着暗红微光。与爱人静立崖边，看朝阳穿透薄雾，照亮亿万年地貌。这一刻，是灵魂的共振。入住火山畔的Volcano House，推窗即见奇景，浪漫无需跋涉。



www.hawaiivolcanohouse.com

TRIP.COM + KOL CNY CAMPAIGN – Q1



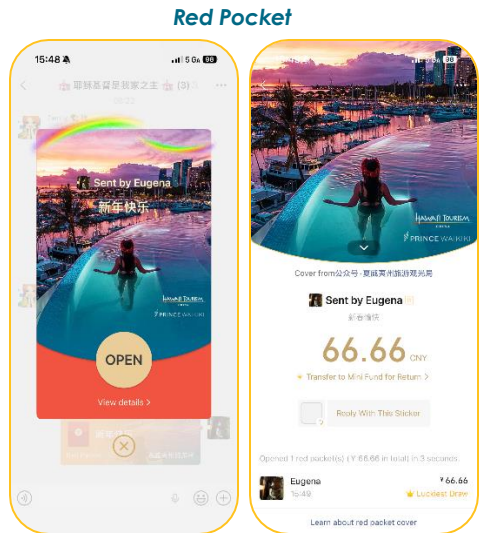
Spark Inspiration (Social Reach)

Leveraged the influence of KOL "叔式生活" alongside HTC's official channels to establish Hawai'i as the premium family choice.



Drive Cultural Relevance (Engagement)

Captured the CNY spirit through limited-edition WeChat Red Covers, pushing brand presence into private, high-trust social circles.

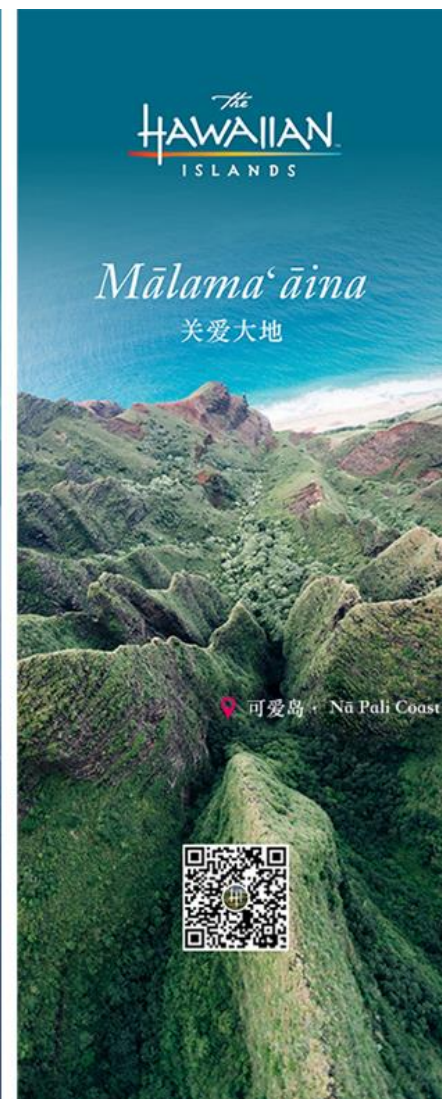
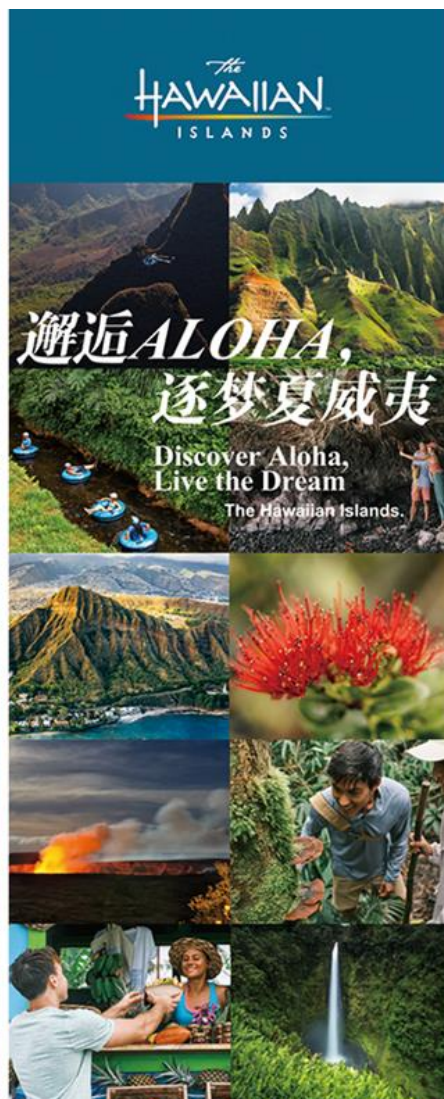
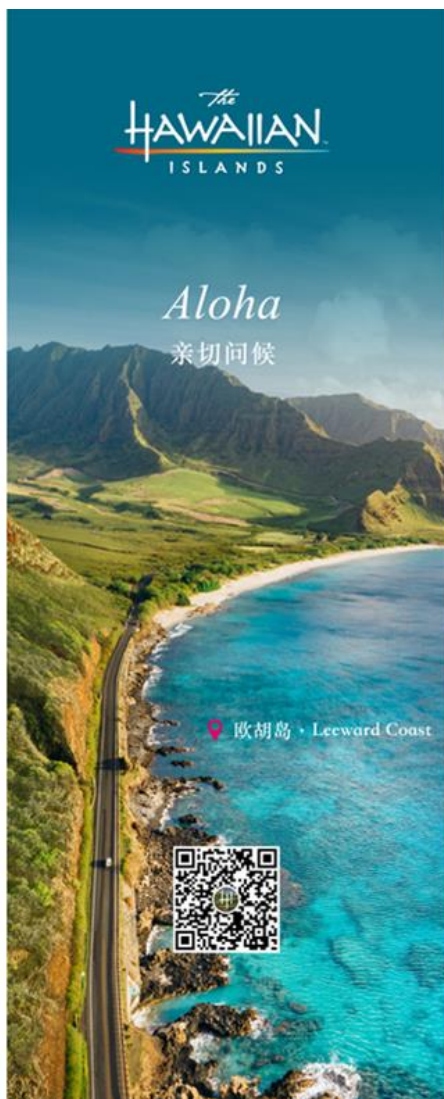


Capture the Demand (Conversion)

Directed all accumulated social intent to a customized Ctrip landing page, utilizing exclusive discounts and a gamified lucky draw to trigger immediate purchases.



Q2 PROGRAMS & ACTIVITIES



ROAD TRIP INFLUENCER-LED CAMPAIGN – Q2



Collaboration

Hertz Rental Car for self-driving exploration



Structure

Season 1 (2026: **O'ahu & Hawai'i Island**);
Season 2 (2027: **Maui & Kaua'i**)



Content

Short-form vlogs on **cultural stops, local dining, sustainable practices**



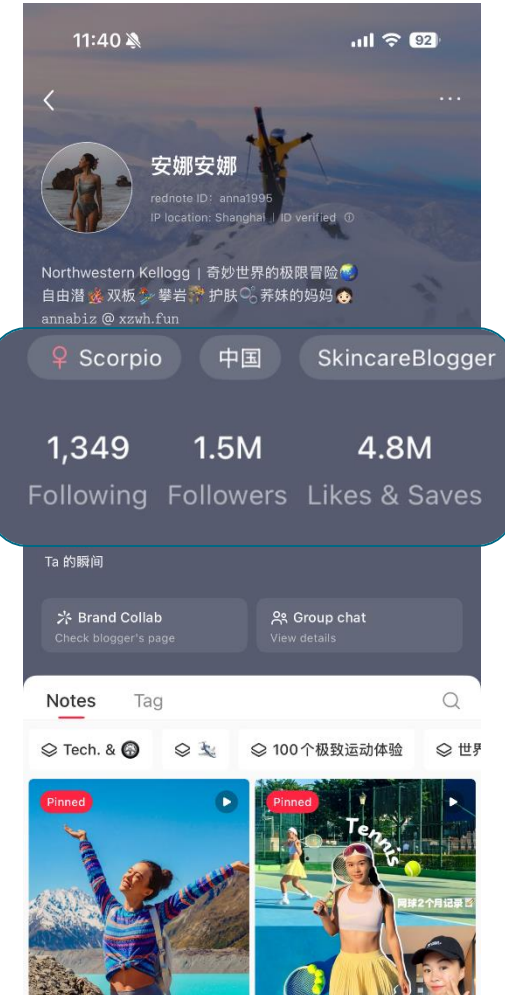
Objectives

Inspire FIT travelers (Gen Z/millennials);
Promote **accessibility, island uniqueness**



Tactics

Recommended **itineraries, rentals/deals**;
Embed **Mālama tips/messaging**



TRAVEL TRADE EDUCATION – Q2

- 01 US Consulate Guangzhou Commercial Service Travel And Tourism Roadshow (B2B) in April
- 02 Macao International Travel (Industry) Expo Roadshow in April
- 03 Training session to travel/ MICE agents like WEMICE, UTOUR, Dear Voyage, etc.



2026 TRADE MISSION (06/03-06/05)

Expanding Trade Outreach

01.

Goals

Forge partnerships, promote the latest offerings/ experiences

02.

Markets

Shanghai, Hangzhou, Suzhou

03.

Partnerships

Major OTA: Fliggy, Tongcheng and AITS

04.

Impacts

Boost visitation, strengthen OTAs market presence



PARTNERSHIP OPPORTUNITIES

01.

Social Media Content
Collaboration (ongoing)

02.

US Embassy & Consulates Tourism
Roadshows (quarterly)

03.

Coffee Meets Culture Immersive
Agritourism (Mar-Jun 2026)

04.

Trade Mission – Eastern China
(June 2026)

05.

HTC + Hertz road trip multi-year
influencer-led digital series (April 2026)

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Mahalo
谢谢!

