

A Study on the Landscape of People's Livelihood in Hainan after the Integrated Customs Operations from a Big Data Perspective

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Abstract: On December 18, 2025, the integrated customs operations of the entire Hainan Free Trade Port were officially launched, marking a historic leap for Hainan from a 'policy testing ground' to a 'mature institution phase'. From a big data perspective, this paper systematically analyzes the multidimensional changes in the lives of Hainan's residents post-integrated customs operations. The research finds that the impact of the integrated customs operations is not a unidirectional 'universal dividend', but rather a landscape full of tension and disparity: the 'zero-tariff' policy on daily consumer goods has catalyzed a fundamental shift in shopping patterns for island residents, yet it also faces tests of commercial sustainability; the continued boom in offshore duty-free sales and the explosive growth of visa-free inbound tourists have reshaped spatial interactions and identity perceptions between local residents and external consumers; the profound industrial restructuring towards high-tech and the 'Five Directions for Strength' has both created new employment opportunities and forced an upgrade of labor skills; the expansion of educational degree supply and the deployment of high-quality medical resources to grassroots levels are narrowing the geographical gap in access to public services. This paper argues that post-integrated customs operations, Hainan is undergoing a crucial transition from being 'policy dividend-driven' to 'institutional advantage-converting'. The ultimate quality of people's lives depends on the deep-seated alignment between the people-centric design of policies and the sophistication of governance capacity.

Keywords: Hainan Free Trade Port; Integrated Customs Operations; People's Livelihood; Big Data Perspective; Public Well-being

1. Introduction

On December 18, 2025, the integrated customs operations of the entire Hainan Free Trade Port were officially launched. This moment was recorded in the Government Work Report on March 5, 2026: 'The integrated customs operations of the Hainan Free Trade Port have commenced.' [2] For Hainan, this is not only a critical node in its institutional evolution but also a watershed moment in the daily lives of millions of its residents.

Integrated customs operations are often simplified into a combination of policy terms like 'zero tariffs' and 'liberalization and facilitation.' However, the ultimate impact of any major institutional change eventually reverts to the ordinary aspects of people's lives: daily necessities, food, clothing, housing, and transportation. When the institutional design of 'free flow overseas, effective control at the border, and free movement within the island' [11] translates into price tags on supermarket

shelves, job postings on recruitment websites, expert appointment slots in hospital registration systems, and the number of places in school enrollment plans, only then does integrated customs operations complete its final kilometer of transmission from a national strategy to individual experience.

This paper attempts to introduce a ‘big data perspective’—which implies not merely citing officially published statistics, but also systematically integrating ‘traces of life’ scattered across different fields, platforms, and scenarios. Consumption monitoring data from the Spring Festival Golden Week, sales records of offshore duty-free shops, registration information of new market entities, passenger flow curves at ports of entry, spatial distribution of public service resources... These data fragments, when pieced together, form a panoramic picture of the lives of Hainan’s residents after the integrated customs operations.

The core question of this paper is: What substantive changes have the integrated customs operations brought to the lives of Hainan’s residents? How do these changes exhibit disparities and imbalances across different groups, regions, and sectors? What logic of institutional transformation can be discerned through these changes at the livelihood level? By systematically answering these questions, this paper aims to provide an observational perspective from the ‘lifeworld’ for understanding the social impact of Hainan Free Trade Port construction.

2. Restructuring of Consumer Life: How The ‘Zero-Tariff’ Dividend Translates Into Daily Experience

2.1 From ‘Reliance on Daigou’ to ‘Zero Tariff at Your Doorstep’

On February 11, 2026, the Xiaonian festival (Little New Year) in southern China, the first batch of five duty-free shops for daily consumer goods for island residents opened simultaneously in the core business districts of Haikou, Sanya, and Danzhou [8]. For island residents, this represented the policy landing with the most palpable ‘experiential temperature’ post-integrated customs operations.

‘Previously, I had to rely on daigou (overseas personal shopping agents) to buy imported goods, but now I can enjoy zero tariffs at my doorstep—the value for money is incredible!’ The exclamation of Ms. Wu, a Haikou resident, captures the essence of the shift in consumption patterns [8]. After integrated customs operations, the proportion of tariff items covered by the ‘zero-tariff’ policy increased from 21% to 74%, encompassing approximately 6,600 tariff items [2]. More importantly, the spillover effects of the policy dividend are becoming evident—extending gradually from primarily benefiting enterprises importing equipment to encompassing the daily consumption needs of ordinary residents.

As of February 24, 2026, the first batch of duty-free shops for daily consumer goods had attracted 465,000 visitors [9]. The profound implication of this figure is that it is not only proof of consumer traffic but also signifies the translation of ‘zero tariffs’ from an abstract policy into a tangible daily experience. When registered Hainan residents and non-registered permanent residents who have paid social security contributions continuously for 12 months can genuinely feel the price difference in categories such as food, daily chemicals, and small home appliances, only then has integrated customs operations truly entered people’s lives.

2.2 Subtle Shifts in Consumption Structure

Monitoring data from China UnionPay shows that during the 2026 Spring Festival holiday, total consumption in Hainan Province increased by 7.8% year-on-year, with consumption of goods and

dining up 9.2% and service consumption up 5.1% [9]. On the surface, this appears to be a set of routine figures showing steady growth. However, a deeper look into the consumption structure reveals subtle changes underway.

Consumers aged 35-44 became the mainstay, accounting for 30% of the total consumption amount and showing a year-on-year growth of 20.4% [9]. This age group typically corresponds to the role of 'household consumption decision-makers'—their consumption choices often span multiple needs, including children's education, household daily necessities, and leisure entertainment. The age profile of the main consumer groups suggests that the post-integrated customs operations consumption dividend is permeating household units.

More indicative is the data showing that consumption by out-of-town tourists accounted for 54% of the province's total consumption, with a year-on-year growth rate of 10.4%, 5.5 percentage points higher than the growth rate of consumption by local residents [9]. This data reveals a deep-seated structure: the post-integrated customs operations Hainan consumer market is forming a two-tier architecture comprising 'daily consumption by local residents' and 'high-end consumption by inbound tourists.' The intertwining and interaction of these two consumption logics constitute Hainan's unique consumer ecosystem.

2.3 The 'Spillover Effect' of Offshore Duty-Free

As the 'golden brand' of Hainan Free Trade Port, offshore duty-free performed remarkably during the first Spring Festival after integrated customs operations. Statistics from Haikou Customs show that during the holiday, offshore duty-free sales amounted to 2.72 billion yuan, with 325,000 shoppers, representing year-on-year increases of 30.8% and 35.4% respectively compared to the previous Spring Festival [2]. Looking at a longer period, from January 1 to February 24, offshore duty-free sales in the province increased by 24.6% year-on-year [9].

The relationship between offshore duty-free and island resident consumption is not a simple trade-off but involves subtle interaction. On one hand, the boom in offshore duty-free enhances Hainan's overall appeal as a consumer destination, indirectly boosting the prosperity of the local commercial ecosystem. On the other hand, the differences in product categories and pricing systems between offshore duty-free and island resident duty-free shops are shaping differentiated consumption scenarios—the former leaning more towards high-end luxury goods and tourism-related experiences, the latter being closer to daily consumer goods and household routine needs.

The sentiment expressed by Alina, a Russian tourist, is quite representative: 'Shopping at duty-free shops in Hainan is so convenient now. There are many brands, payment is easy, and I can even buy traditional Chinese medicine health products.' [1] This cross-cultural consumption experience vividly illustrates Hainan's role as an international tourism consumption center after integrated customs operations.

3. Employment and Income: Opportunities and Challenges Amidst The Wave of Industrial Transformation

3.1 Surging Vitality of Market Entities

The policy dividends from integrated customs operations are first reflected in the dynamism of market entities. Data indicates that in 2025, Hainan added 31,000 new foreign trade business entities, a year-on-year increase of 41.7%, bringing the total to over 100,000 [2]. Within just three weeks after

the initiation of integrated customs operations, 4,709 new foreign trade business entities were registered [2].

This surge in the number of enterprises translates into an expansion of job opportunities. The growth in registrations corresponds to labor demand in fields such as customs declaration, logistics, cross-border e-commerce, and international settlement. For local workers, this presents both opportunities and challenges—newly created positions often demand higher professional skills and language abilities.

The case of Jingrun Pearl Group offers a micro-level perspective on changes at the enterprise level. As a Hainan-based enterprise primarily engaged in pearl jewelry, cosmetics, and health products, the company benefits from the policy of tariff exemption for processed products with 30% value-added sold domestically, due to its large imports of high-quality raw pearls; imported raw materials for cosmetics also receive varying degrees of tariff reductions [2]. The policy dividend translates into a cost advantage for the enterprise, thereby supporting its expansion of production scale and increased demand for labor. This transmission chain of ‘policy—enterprise—employment’ is the core mechanism through which the integrated customs operations dividend translates into income for the people.

3.2 The ‘Double-Edged Sword’ of Employment from Industrial Upgrading

The ‘15th Five-Year Plan’ for Hainan's National Economic and Social Development outlines the main directions for industrial development: promoting the strengthening and extension of the chains for the four leading industries, cultivating and expanding characteristic industrial chains under the ‘Five Directions for Strength’ (Nanfan seed industry, aerospace, deep-sea, green economy, digital economy), and making forward-looking arrangements for future industries under the ‘Four New’ categories (biomanufacturing, hydrogen energy, brain-computer interfaces, embodied intelligence) [3-4].

The impact of this industrial blueprint on the job market will be structural. On one hand, the rapid development of high-tech industries is creating a large number of high-skilled positions. According to Wang Xiuhao, Deputy Director of the Hainan Provincial Department of Industry and Information Technology, during the ‘14th Five-Year Plan’ period, Hainan's high-tech industry maintained rapid development. In 2025, the revenue of the province's high-tech industry exceeded 600 billion yuan, with industrial clusters in petrochemical new materials, biomedicine, and digital economy continuing to grow [1]. The ‘15th Five-Year Plan’ aims for even higher goals, not only upgrading and transforming traditional industries but also strengthening specialty industrial chains like coconut and coffee, and innovatively developing characteristic products such as coconut carving and Li brocade.

On the other hand, industrial upgrading also exerts pressure on the skill structure of the labor force. Jobs in traditional services and low-skilled manufacturing may face transformation pressure, while talent gaps in fields like biomedicine and the digital economy need to be filled through vocational training and improvements in the education system. This structural tension in the job market will be a significant challenge for Hainan's residents post-integrated customs operations.

3.3 The People-Centered Temperature of Income Growth

The ‘Plan’ proposes 24 specific indicators across five areas: open development, innovation-driven growth, people's livelihood and welfare, green and low-carbon development, and security assurance.

It is noteworthy that indicators related to people's livelihood and welfare are the most numerous, totaling eight, addressing concerns such as employment, income, education, healthcare, childcare, and elderly care [4].

Qi Shuli, Director of the Hainan Provincial Development and Reform Commission, emphasized during the interpretation of the 'Plan' that the core concept behind setting these indicators is 'to let the achievements of Free Trade Port construction benefit the people of Hainan more extensively' [4]. The profound implication of this statement is that integrated customs operations are not just a strategic measure for opening up but should also serve as an institutional vehicle for improving people's livelihoods. Various indicators of economic growth must ultimately translate into perceptible income growth and improved living standards for the common people.

A set of data from the Spring Festival holiday provides evidence: the province received 12.3205 million tourists, achieving total tourist spending of 18.366-billion-yuan, year-on-year increases of 28.9% and 30.7%, respectively. Looking at per capita consumption, overnight tourists spent an average of 4,052 yuan, while same-day tourists spent an average of 537 yuan [2]. The prosperity of the tourism market directly translates into income growth for practitioners—tour guides, drivers, catering staff, hotel employees, and others become the most direct beneficiaries of the integrated customs operations dividend.

4. The Reshaping of Social Space: Tensions Between Internationalization and Locality

4.1 The 'Visa-Free Dividend' and Daily Life at Ports of Entry

Following the implementation of integrated customs operations, Hainan has maintained the nation's most favorable visa-free policy framework. Currently, nationals of 59 countries can enter Hainan visa-free for up to 30 days. Combined with multiple facilitation policies—including 144-hour visa-free entry for foreign tourist groups from Hong Kong and Macau, and 240-hour transit visa-free access—travelers from 86 countries worldwide can enter conveniently with valid ordinary passports [8].

The openness of these policies is directly reflected in the curves of entry-exit passenger flows. During the Spring Festival holiday, the number of visa-free inbound foreign visitors to Hainan increased by 75.6% year-on-year. The scene at the international terminal of Sanya Phoenix International Airport in the early hours of February 2nd was particularly symbolic: five international flights landed successively in the latter part of the night, with hundreds of foreign passengers clearing customs in an orderly manner. Faces of different skin tones created a striking contrast with the bright red festive lanterns. Mr. Shen from South Korea, celebrating the Chinese New Year for the first time, remarked, 'It was especially convenient to come here visa-free, and the entry procedures were also very smooth.'

For residents living in areas surrounding the ports of entry, the influx of international tourists is reshaping the 'texture' of their daily environment. Taxi drivers may need to learn simple foreign language greetings, restaurant menus may require multilingual versions, and commercial district signage must adapt to the recognition habits of international visitors. These seemingly minor changes are concrete manifestations of internationalization permeating from the policy level into the fabric of society.

4.2 Development of the 'Two Bases' and Community Transformation

The 'Plan' explicitly proposes accelerating the development of the 'Two Bases'—a base for

domestic enterprises to expand overseas and a base for international enterprises to enter China [7-3]. This strategic positioning will have profound implications for Hainan's socio-spatial structure.

Central state-owned enterprises are accelerating the establishment of regional headquarters, while multinational corporations and international organizations are progressively establishing a presence in Hainan [7]. This signifies that a cohort of high-income, highly skilled migrants will be entering the province. Their demands for housing, consumption, education, and healthcare will create new pressures and tests for urban spatial planning and public service provision. Certain areas may experience accelerated gentrification, with rising housing prices and living costs potentially displacing original residents. The issue of benefit distribution during this spatial restructuring necessitates forward-looking planning and nuanced policy responses.

4.3 Identity Formation through Cultural and Tourism Integration

During the Spring Festival period, Hainan coordinated efforts across its 18 cities and counties to launch 165 cultural and tourism activities [8]. Ranging from New Year festivities to artistic spectacles, from sporting events to immersive experiences, these activities mobilized the entire region to create a rich festive atmosphere. The Fucheng Lantern Festival and Flower Exchange in Haikou, hailed as the 'Chinese Valentine's Day,' drew massive crowds filling the streets, while the New Year market on Haikou's Qilou Old Street ran continuously from January 25 to March 3 [8].

The flourishing of cultural and tourism activities represents not merely an economic phenomenon but a process of cultural identity reproduction. As distinctive products such as coconut carvings and Li brocade undergo innovative development [1], and as the 'Hainan flavor' becomes a selling point for cultural tourism consumption, local residents, through their participation in these activities, simultaneously reaffirm their connection to local culture. The reinforcement of this cultural identity constitutes a vital force in balancing 'openness' with 'rootedness' amidst the ongoing process of internationalization.

5. The Warmth of Public Services: Educational Places, Medical Care, and 'Quality Resources at Your Doorstep'

5.1 Education: A Livelihood Commitment of 70,000 New Senior High School Places

Education is the foundation of people's livelihood. The 'Plan' specifies that during the '15th Five-Year Plan' period, efforts will be made to expand the supply of public senior high school places, adding approximately 70,000 places and deepening group-run schooling initiatives to enable more children to access quality education [1].

Seventy thousand new places mean that children from approximately 70,000 families will gain opportunities to receive public senior high school education. In a province like Hainan, where basic education resources are relatively underdeveloped, this figure carries the expectations of millions of families. Xing Kongzheng, Deputy Director of the Hainan Provincial Department of Education, emphasized during his interpretation that efforts will continue to polish the brand 'Studying in Hainan equals Studying Abroad,' attracting more international educational resources to the province [1]. Hainan's educational development must both increase the supply of school places and build an internationally recognized education brand.

5.2 Healthcare: The Vision of 'Accessing Quality Medical Care Without Leaving the Island'

The 'Plan' proposes striving to realize the vision of accessing quality medical services without

leaving the island [4]. For an island province, the accessibility of quality medical resources has always been a pain point for people's livelihood. In the past, patients with difficult and severe illnesses in Hainan often needed to travel across the sea to Guangzhou, Beijing, and other places for treatment, which not only increased their financial burden but also delayed treatment opportunities.

Following the implementation of integrated customs operations, the policy advantages of the Boao Lecheng International Medical Tourism Pilot Zone are expected to be further amplified. The 'extreme streamlining of approval' system for introducing unmarketed drugs and medical devices from abroad [10] is beginning to benefit more ordinary patients. When 'international healthcare' is no longer a luxury for the few but an accessible public service for ordinary people, the livelihood warmth of integrated customs operations is truly manifested.

5.3 The Deep Logic of Inclusive Livelihood Construction

The 'Plan's' deployment in the area of people's livelihood reflects a distinct orientation towards 'inclusiveness'—strengthening inclusive, foundational, and safety-net livelihood construction [3]. The deep logic underlying this policy orientation is that Free Trade Port construction cannot merely create 'bonsai' (showpieces) but must cultivate a 'forest'; it cannot serve only high-end groups but must benefit all the people.

Qi Shuli, Director of the Hainan Provincial Development and Reform Commission, emphasized during the interpretation of the 'Plan' the importance of letting the achievements of Free Trade Port construction benefit the people of Hainan more extensively [3]. The political economy implication of this statement is that the institutional dividends from integrated customs operations need to be mediated through the public service system to translate into perceptible life improvements for every ordinary person. Incremental progress in areas such as school places, hospital beds, elderly care, and childcare constitutes the crucial link where this 'translation' occurs.

6. Risks and Tensions: The Other Side of Life Post-integrated Customs Operations

6.1 Spatial Imbalance of Policy Dividends

The first batch of five duty-free shops for daily consumer goods covers the core business districts of Haikou, Sanya, and Danzhou [8]. This means that residents living in the provincial capital and regional central cities can be the first to enjoy 'zero tariffs at their doorstep'; for the vast majority of residents in counties and rural areas, accessing the policy dividend still requires traveling to cities for consumption. This spatial imbalance could potentially widen the gap in consumption welfare between urban and rural areas, and between different regions.

Similarly, the expansion of educational resources is mainly concentrated in urban areas, and the optimization of medical resources also centers on urban tertiary hospitals. How to enable policy dividends to break through spatial barriers and achieve more balanced distribution is a practical challenge for livelihood construction post-integrated customs operations.

6.2 Potential Increase in Living Costs

The process of internationalization is often accompanied by rising living costs. The influx of high-income migrants may drive up housing prices and rents in core urban areas; the positioning as an international tourism consumption center may lead some commodity and service prices to align with international levels; the clustering of high-end commercial formats may squeeze the living space for affordable consumption venues.

For ordinary people, the shopping benefits brought by ‘zero tariffs’ need to be weighed against changes in overall living costs. If the increase in essential expenditures such as housing, education, and healthcare outpaces the consumption dividend, the sense of gain from integrated customs operations might be partially offset.

6.3 The Challenge of Structural Matching in the Job Market

As mentioned earlier, the development of high-tech industries creates numerous high-skilled positions. However, whether the local workforce can successfully fill these positions depends on the responsiveness of the education and training system. There is a clear gap between the talent demands in fields like petrochemical new materials, biomedicine, and the digital economy and the existing skill structure of the labor force.

Resolving this structural matching challenge relies on improving the vocational training system and optimizing the allocation of educational resources. Otherwise, an awkward situation of ‘jobs waiting for people’ coexisting with ‘people waiting for jobs’ may arise—emerging industries struggling to find qualified talent while unemployed workers from traditional sectors find it difficult to re-enter the workforce.

6.4 Balancing Risk Prevention and Convenience in Daily Life

Post-integrated customs operations, Hainan needs to construct a more sophisticated risk prevention and control system. A series of institutional arrangements, such as risk prevention for ‘zero-tariff’ inbound goods, identification of tax evasion risks, and monitoring of cross-border capital flows [7], are necessary conditions for ensuring the steady and long-term development of the Free Trade Port.

However, there is an inherent tension between risk prevention and convenience in daily life. Stricter customs supervision, more intensive information collection, and more cumbersome declaration procedures may impact people's daily experience to some extent. Finding the optimal balance between ‘effective liberalization’ and ‘effective control’ [10] tests the sophistication of the governance system.

7. Conclusion: Towards an Institutional Advancement of ‘People's Sense of Gain’

The profound significance of the integrated customs operations of the Hainan Free Trade Port needs to be understood over a longer temporal horizon. While the data surge from the 2026 Spring Festival is certainly encouraging, the true impact of integrated customs operations on people's lives will gradually unfold over the next five, ten years, or even longer.

Through the scan from a big data perspective, a preliminary picture of the lives of Hainan's residents post-integrated customs operations can be outlined: In the realm of consumption, the ‘zero-tariff’ dividend is materializing from policy text into price tags on supermarket shelves, but its spatial distribution remains uneven; in employment, the dynamism of market entities is creating numerous new jobs, but industrial upgrading exerts pressure on workers' skills; at the level of social space, the significantly increased degree of internationalization is reshaping the ‘texture’ of daily life, but the sense of belonging among local residents needs continuous cultivation; in terms of public services, the optimization of educational and medical resources is narrowing the geographical gap in sense of gain, but the construction of an inclusive livelihood system still faces significant tasks.

The ‘15th Five-Year Plan’ for Hainan's National Economic and Social Development places

people's livelihood and welfare indicators in a prominent position, with eight out of 24 indicators pertaining to people's livelihood [4]. The profound implication of this indicator setup is that integrated customs operations are not an end, but a means; openness is not the destination, but the path. The ultimate yardstick for measuring the success of Free Trade Port construction is the substantive improvement in the quality of life of millions of people.

The transformation from 'policy dividend' to 'quality of life' requires traversing a series of intermediate steps: policies need to be refined into actionable implementation plans, plans need to translate into concrete public service provisions, and service provisions need to precisely match the real needs of the people. Attenuation or distortion at any stage could prevent the goodwill of policies from reaching the 'last kilometer.'

Post-integrated customs operations, Hainan stands at a critical juncture, transitioning from a 'policy testing ground' to a 'mature institution zone.' The ultimate test of this process is not the number of institutional innovations or preferential policies, but whether every ordinary person can truly feel: more good schools near home, easier access to specialist doctors, more affordable shopping, better job opportunities, and a more promising life.

When integrated customs operations returns from grand narrative to daily necessities, and merges from policy texts into everyday experience, only then will the Hainan Free Trade Port have completed the precarious leap from 'national strategy' to 'people's welfare.' The ultimate landing point of this precarious leap will determine Hainan's future—not just as an open free trade port, but as a happy homeland.

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