



Taiwan Fact Sheet

Taiwan Overview

The HTA, through Hawai'i Tourism Taiwan (HTT), implements targeted marketing programs to increase awareness and drive travel demand to Hawai'i. Since 2014, HTA has contracted with JWI Marketing (JWI) to provide marketing representation services in Taiwan. JWI Marketing was established in 2009 and is a wholly owned subsidiary of the Lion Group. In 2019, HTT continues to focus on growing high-value visitation from Taiwan to Hawai'i through travel trade education and collaboration, ongoing digital and social media promotions, and integrated consumer campaigns to keep Hawai'i "top of mind" among Taiwanese consumers.

Year-to-Date December 2019 Quick Facts¹

Visitor Expenditures: \$58.0 million
Primary Purpose of Stay: Pleasure (20,324) vs. MCI (2,798)
Average Length of Stay: 8.99 days
First Time Visitors: 70.0%
Repeat Visitors: 30.0%

TAIWAN (by Air)	2018	2017	% Change 2018 vs 2017	2019 Forecast (Quarter 3 2019)	% Change 2018 vs 2019 Forecast	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Visitor Expenditures* (\$ Millions)	39.1	35.9	8.9%	47.5	21.5%	58.0	39.1	48.5%
Visitor Days	162,220	161,429	0.5%	194,260	19.8%	232,692	162,220	43.4%
Arrivals	17,523	19,463	-10.0%	21,068	20.2%	25,885	17,523	47.7%
Per Person Per Day Spending* (\$)	240.8	222.1	8.4%	244.3	1.4%	249.4	240.8	3.5%
Per Person Per Trip Spending* (\$)	2,229.6	1,842.4	21.0%	2,252.3	1.0%	2,241.6	2,229.6	0.5%
Length of Stay (days)	9.26	8.29	11.6%	9.22	-0.4%	8.99	9.26	-2.9%

**Excludes supplemental business spending*

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¹ 2019 visitor data are preliminary. January – June 2019 data were updated with immigration statistics from the National Travel and Tourism Office (NTTO). 2018 and 2017R visitor data are the final numbers and reflect updated immigration statistics from NTTO; updated airfare statistics from DIIO Mi Airline database, and final passenger counts for Airline reports.

Market Summary

- In 2018, visitor expenditures from Taiwan grew 8.9 percent to \$39.1 million. In 2019, visitor expenditures rose significantly (+48.5% to \$58.0 million) boosted by increased arrivals (+47.7% to 25,885 visitors) and higher daily spending (+3.5% to \$249 per person) compared to 2018. Contributing to the growth was more than 4,000 visitors from an insurance group that traveled on incentives to Honolulu in May 2019.
- In 2018, 96.4 percent visitors from Taiwan went to O'ahu, 26.8 percent to the island of Hawai'i, 20.6 percent went to Maui, and 3.7 percent went to Kaua'i. In 2019, Taiwanese visitors to O'ahu, the island of Hawai'i, Maui, and Kaua'i were at 97.9 percent, 25.1 percent, 15.9 percent, and 3.8 percent, respectively.
- In 2018, 30.3 percent of visitors from Taiwan were repeat visitors. In 2019, repeat visitors comprised 30.0 percent.
- In 2018, 7.9 percent of all visitors to Hawai'i from Taiwan came on group tours. In 2019, group tour arrivals made up 9.6 percent.
- In 2018, air capacity to Hawai'i from Taiwan increased 2.0 percent to 31,824 scheduled seats. In 2019, air capacity rose 25.0 percent from 2018 to 39,780 seats.

Market Conditions

- Taiwan's government revised its GDP forecast to 2.73 percent for 2019 from the previous 2.2 percent as the economic growth accelerated in the final quarter of 2019 due to stronger exports, private consumption and investment returning from China.
- Currency exchange rate fluctuations play an important role in Taiwanese consumers' decision-making in overseas travel destination and spending.
- From January to November 2019, Taiwan total outbound visitation is up 3.4 percent compared to the same period in 2018. Through November, visitation to the U.S. decreased 3.27 percent year-over-year.
- Short-haul competition from Southeast Asian destinations remains strong in November 2019: Vietnam (+32.2%), Myanmar (+27.1%) and Philippines (+26.3%) have seen greater growths because of their affordable pricing and proximity to Taiwan. On the other hand, Hong Kong has seen consistent declines over the past four months due to the ongoing protests and demonstrations.
- Long-haul competition from New Zealand continues to be strong with 63.3 percent visitation growth YOY (YTD November 2019) due to favorable currency exchange rates and the new direct flight between Taipei and Auckland.
- According to Expedia's latest report on the most popular overseas destinations for the Taiwanese in 2018, the top ten destinations are all located in Asia. Expedia indicated that the increasing popularity of low-cost carriers and New Southbound Policy by Taiwan's government contributed to the visitor traffic to these Asian destinations.
- According to Skyscanner's APAC Travel Trends 2018 report, social media is the most influential source of travel inspirations (56.4%) in Taiwan where influencers' photos and videos and recommendations allow local consumers to virtually experience destinations.

Distribution by Island

TAIWAN (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
O'ahu	16,883	18,677	-9.6%	25,339	16,883	50.1%
Maui County	3,730	3,303	12.9%	4,238	3,730	13.6%
Maui	3,603	3,244	11.1%	4,107	3,603	14.0%
Moloka'i	113	30	280.7%	55	113	-51.5%
Lāna'i	277	46	501.5%	136	277	-50.7%
Kaua'i	653	1,277	-48.9%	971	653	48.8%
Island of Hawai'i	4,688	5,207	-10.0%	6,489	4,688	38.4%

Airlift

Departure City	2019					2018					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Taipei	7,956	10,710	11,934	9,180	39,780	7,650	7,956	8,262	7,956	31,824	4.0	34.6	44.4	15.4	25.0

Source: Diio Mii airline schedules, updated January 10, 2020

Group vs. True Independent; Leisure vs. Business

TAIWAN (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Group vs True Independent (Net)						
Group tour	1,386	2,692	-48.5%	2,478	1,386	78.8%
True Independent (Net)	10,774	10,329	4.3%	15,436	10,774	43.3%
Leisure vs business						
Pleasure (Net)	14,305	14,982	-4.5%	20,324	14,305	42.1%
MCI (Net) *	1,909	2,643	-27.8%	2,798	1,909	46.5%
Convention/Conf.	1,129	573	97.2%	970	1,129	-14.1%
Corp. Meetings	117	847	-86.2%	434	117	272.2%
Incentive *	739	1,231	-40.0%	1,515	739	105.1%

* Sample size for Incentive visitors from Taiwan in May 2019 was low.

Taiwan: First Timers vs. Repeat Visitors

TAIWAN (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
1st timers (%)	69.7	70.9	-1.2	70.0	69.7	0.3
Repeaters (%)	30.3	29.1	1.2	30.0	30.3	-0.3

Tax Revenue

TAIWAN (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
State tax revenue generated* (\$ Millions)	4.56	4.19	8.9%	6.77	4.56	48.5%

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