



Taiwan Fact Sheet

Taiwan Overview

The HTA, through Hawai'i Tourism Taiwan (HTT), implements targeted marketing programs to increase brand awareness and drive high-value visitation to Hawai'i. The HTA selected a marketing contractor, Brand Story Asia to provide destination representation services for the Hawaiian Islands in Taiwan effective January 1, 2020. Brand Story was established in 2006 with offices in Taipei and other major cities in Asia. In 2020, HTT employs a strategic mix of trade marketing partnerships as well as consumer engagement via advertising, public relations, social and digital programs to target high-value responsible travelers to Hawai'i.

Year-to-date November 2020 Quick Facts¹

Visitor Expenditures: NA (Not Available)
 Primary Purpose of Stay: Pleasure (2,762) vs. MCI (370)
 Average Length of Stay: 9.92 days
 First Time Visitors: 63.2%
 Repeat Visitors: 36.8%

| TAIWAN (by Air) | 2018 | 2019 | % Change 2019 vs 2018 | 2020* Forecast | % Change 2019 vs 2020 Forecast | YTD Nov. 2020P | YTD Nov. 2019 | % change YTD |
|-------------------------------------|---------|---------|-----------------------|----------------|--------------------------------|----------------|---------------|--------------|
| Visitor Expenditures* (\$ Millions) | 39.1 | 54.8 | 40.2% | NA | NA | NA | 51.7 | NA |
| Visitor Days | 162,220 | 218,207 | 34.5% | NA | NA | 34,835 | 205,173 | -83.0% |
| Arrivals | 17,523 | 24,242 | 38.3% | NA | NA | 3,512 | 22,808 | -84.6% |
| Average Daily Census | 444 | 598 | 34.5% | | | 104 | 614 | -83.1% |
| Per Person Per Day Spending* (\$) | 240.8 | 251.0 | 4.2% | NA | NA | NA | 251.9 | NA |
| Per Person Per Trip Spending* (\$) | 2,229.6 | 2,259.0 | 1.3% | NA | NA | NA | 2,266.2 | NA |
| Length of Stay (days) | 9.26 | 9.00 | -2.8% | NA | NA | 9.92 | 9.00 | 10.3% |

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts were not available at the time of report publication.

Contact Information

Hawai'i Tourism Authority: Jadie Goo
 Director of Marketing
 Tel: (808) 973-2252
jadie@gohta.net

Hawai'i Tourism Taiwan: Molly Jou
 Trade & MCI Marketing Director
 Tel: 886 963 922 520
Molly.jou@brandstory.asia

¹ 2020 and 2019 visitor data are preliminary. 2018 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

Beginning October 15, passengers arriving from out-of-state and traveling inter-county could bypass the mandatory 14-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing and Travel Partner. A new policy went into effect on November 24 requiring all trans-Pacific travelers participating in the pre-travel testing program to have a negative test result before their departure to Hawai'i, and test results would no longer be accepted once a traveler arrives in the state. Kaua'i, Hawai'i Island, Maui, and Moloka'i also had a partial quarantine in place in November. Lāna'i residents and visitors were under a stay-at-home order from October 27 to November 11. In addition, the U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "No Sail Order" on all cruise ships.

Taiwanese citizens were allowed to visit the U.S. and returning Taiwanese residents were required to quarantine for 14 days.

There were 31 visitors in November 2020 compared to 990 visitors a year ago. Visitor spending data were not available.

- Through the first 11 months of 2020, arrivals decreased 84.6 percent to 3,512 visitors. Visitor days declined 83.0 percent. The average daily census showed 104 visitors per day, an 83.1 percent drop compared to the first 11 months of 2019.
- Through the first 11 months of 2020, O'ahu, the island of Hawai'i, Maui, and Kaua'i received 96.9 percent, 35.5 percent, 17.5 percent, and 3.8 percent of Taiwanese visitors, respectively. Repeat visitors comprised 36.8 percent. Group tour arrivals made up 3.1 percent.
- Through the first 11 months of 2020, air capacity dropped 80.2 percent to 7,344 seats.
- In 2019, visitor spending rose significantly (+40.2% to \$54.8 million), boosted by increased arrivals (+38.3% to 24,242 visitors) and higher daily spending (+4.2% to \$251 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. The average daily census showed 598 visitors per day in 2019, up 34.5 percent compared to 2018.
- In 2019, 97.8 percent visitors from Taiwan went to O'ahu, 24.8 percent to the island of Hawai'i, 16.2 percent went to Maui, and 3.8 percent went to Kaua'i. In 2019, 30.0 percent of visitors from Taiwan were repeat visitors; 9.7 percent of all visitors to Hawai'i from Taiwan came on group tours.
- In 2019, air capacity to Hawai'i from Taiwan increased 25.0 percent to 39,780 scheduled seats.

Market Conditions

- Taiwan's economy rebounded strongly in Quarter 3, contrasting the marginal contraction in Quarter 2 and marking the best result in two years. The turnaround was spearheaded by firmer exports growth, chiefly thanks to soaring demand for Taiwanese electronic goods from China and the U.S. Domestically, consumer demand showed signs of recovery in Quarter 3, contracting at a much softer pace than in Quarter 2.
- Taiwan's Ministry of Health and Welfare (MHW) announced recently that it is recruiting 20,000 volunteers for Phase 2 clinical trials of coronavirus vaccines developed by Taiwanese researchers. Over 6,000 volunteers have signed up on the first day.

- Singapore has reportedly approached Taiwanese authorities about negotiating for a travel bubble agreement intended to boost business and commercial activities.
- According to one of the biggest department stores in Taiwan, the total revenue for the annual sale is expected to achieve a total of US \$670 million. All department stores in Taiwan are seeing a growth in the annual sale promotion period.
- EVA Air kicked-off facial recognition services for passengers departing San Francisco. The Biometrics Exit Program, deployed by U.S. Customs & Border Protection, speeds up the boarding process and reduces contact with ground staff. The airline plans to extend its contactless services to self-check-in kiosks, self-service baggage drop-offs, lounges, and boarding gates across its network.
- Soon after United Airlines has resumed 3 weekly non-stop services from Taiwan to San Francisco since November, the airline is increasing its frequency of flights to 5 times weekly in December.
- Taiwan's start-up airline, StarLux Airlines, has applied with the Civil Aeronautics Administration (CAA) for the rights to fly to 15 American destinations including Honolulu with operations expected to begin by 2022. It will be Taiwan's third airline to operate services to the USA.

Distribution by Island

| TAIWAN (by Air) | 2018 | 2019 | % Change 2019 vs 2018 | YTD Nov. 2020P | YTD Nov. 2019 | % change YTD |
|-------------------|--------|--------|--------------------------|-------------------|------------------|-----------------|
| O'ahu | 16,883 | 23,707 | 40.4% | 3,402 | 22,331 | -84.8% |
| Maui County | 3,730 | 4,051 | 8.6% | 630 | 3,817 | -83.5% |
| Maui | 3,603 | 3,928 | 9.0% | 615 | 3,702 | -83.4% |
| Moloka'i | 113 | 46 | -59.5% | 22 | 38 | -41.8% |
| Lāna'i | 277 | 130 | -52.9% | 3 | 130 | -97.5% |
| Kaua'i | 653 | 914 | 40.0% | 134 | 830 | -83.9% |
| Island of Hawai'i | 4,688 | 6,001 | 28.0% | 1,248 | 5,572 | -77.6% |

Airlift

| Departure City | 2020 | | | | | 2019 | | | | | %CHANGE | | | | |
|----------------|-------|----|----|----|--------|-------|--------|--------|-------|--------|---------|--------|--------|--------|--------|
| | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual |
| Taipei | 7,344 | 0 | 0 | 0 | 7,344 | 7,956 | 10,710 | 11,934 | 9,180 | 39,780 | -7.7 | -100.0 | -100.0 | -100.0 | -81.5 |

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules as of October 27, 2020, subject to change.

Group vs. True Independent; Leisure vs. Business

| TAIWAN (by Air) | 2018 | 2019 | % Change 2019 vs 2018 | YTD Nov. 2020P | YTD Nov. 2019 | % change YTD |
|---------------------------------|--------|--------|--------------------------|-------------------|------------------|-----------------|
| Group vs True Independent (Net) | | | | | | |
| Group tour | 1,386 | 2,361 | 70.3% | 110 | 2,272 | -95.2% |
| True Independent (Net) | 10,774 | 14,390 | 33.6% | 2,235 | 13,409 | -83.3% |
| Leisure vs business | | | | | | |
| Pleasure (Net) | 14,305 | 18,934 | 32.4% | 2,762 | 17,749 | -84.4% |
| MCI (Net) * | 1,909 | 2,670 | 39.8% | 370 | 2,595 | -85.7% |
| Convention/Conf. | 1,129 | 904 | -19.9% | 188 | 862 | -78.2% |
| Corp. Meetings | 117 | 413 | 254.6% | 60 | 405 | -85.1% |
| Incentive * | 739 | 1,469 | 98.8% | 176 | 1,444 | -87.8% |

Taiwan: First Timers vs. Repeat Visitors

| TAIWAN (by Air) | 2018 | 2019 | % Change 2019 vs 2018 | YTD Nov. 2020P | YTD Nov. 2019 | % change YTD |
|-----------------|------|------|--------------------------|-------------------|------------------|-----------------|
| 1st timers (%) | 69.7 | 70.0 | 0.2 | 63.2 | 69.3 | -6.1 |
| Repeaters (%) | 30.3 | 30.0 | -0.2 | 36.8 | 30.7 | 6.1 |

Tax Revenue

| TAIWAN (by Air) | 2018 | 2019 | % Change 2019 vs 2018 | YTD Nov. 2020P | YTD Nov. 2019 | % change YTD |
|--|------|------|--------------------------|-------------------|------------------|-----------------|
| State tax revenue generated* (\$ Millions) | 4.56 | 6.39 | 40.2% | NA | 6.03 | NA |

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