



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 December 2020 Quick Facts¹

Visitor Expenditures: NA (Not Available)
 Primary Purpose of Stay: Pleasure (2,780) vs. MCI (370)
 Average Length of Stay: 9.90 days
 First Time Visitors: 62.9%
 Repeat Visitors: 37.1%

TAIWAN (by Air)	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
Visitor Expenditures* (\$ Millions)	39.1	54.8	40.2%	NA	NA	NA	54.8	NA
Visitor Days	162,220	218,207	34.5%	NA	NA	35,021	218,207	-84.0%
Arrivals	17,523	24,242	38.3%	NA	NA	3,537	24,242	-85.4%
Average Daily Census	444	598	34.5%	NA	NA	96	598	-84.0%
Per Person Per Day Spending* (\$)	240.8	251.0	4.2%	NA	NA	NA	251.0	NA
Per Person Per Trip Spending* (\$)	2,229.6	2,259.0	1.3%	NA	NA	NA	2,259.0	NA
Length of Stay (days)	9.26	9.00	-2.8%	NA	NA	9.90	9.00	10.0%

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

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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 through the state's Safe Travels program. Effective November 24, all trans-Pacific travelers participating in the pre-travel testing program were required to have a negative test result before their departure to Hawai'i, and test results would no longer be accepted once a traveler arrived in Hawai'i. On December 2, Kaua'i County temporarily suspended its participation in the state's Safe Travels program, making it mandatory for all travelers to Kaua'i to quarantine upon arrival. On December 10, the mandatory quarantine was reduced from 14 to 10 days in accordance with the U.S. Centers for Disease Control and Prevention's (CDC) guidelines. The counties of Hawai'i, Maui, and Kalawao (Moloka'i) also had a partial quarantine in place in December. In addition, the 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 25 visitors in December compared to 1,434 visitors a year ago. There were no direct flights from Taiwan. These 25 visitors came on domestic flights. Visitor spending data were not available.

- For all of 2020, arrivals decreased 85.4 percent to 3,537 visitors. Visitor days declined 84.0 percent. The average daily census showed 96 visitors per day, an 84.0 percent drop compared to 2019.
- In 2020, O'ahu, the island of Hawai'i, Maui, and Kaua'i received 96.6 percent, 35.4 percent, 17.6 percent, and 3.8 percent of Taiwanese visitors, respectively. Repeat visitors comprised 37.1 percent. Group tour arrivals made up 3.1 percent.
- In 2020, air capacity dropped 81.5 percent to 7,344 scheduled 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.
- Despite the COVID-19 pandemic shrinking economies around the world, Taiwanese government still predicts Taiwan's GDP to grow by 2.5 percent this year. The forecast also sees Taiwan's GDP to grow by 3.8 percent in 2021.

- Due to the severe COVID-19 pandemic situation overseas, outbound travel is nearly impossible for Taiwanese travelers. All leisure travel is postponed or canceled. Travelers turn to travel domestically for holidays.
- Hawai'i and other island destinations remain the most expected destination to form travel bubble with Taiwan. Many potential travelers hope to visit Hawai'i when most people are injected with the vaccine and the pandemic is under control.
- Taiwan's start-up airline Starlux Airlines announced it will launch the first route for North American services to Los Angeles starting 2021. The airline will be the 3rd Taiwanese airline to operate the route in addition to China Airlines and EVA Air.
- Due to increasing COVID-19 infection in the UK, many countries have halt flights from United Kingdom. Taiwanese air carriers – China Airlines and EVA Air will both cut down half of the flights from Taiwan to London.

Distribution by Island

TAIWAN (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
O'ahu	16,883	23,707	40.4%	3,417	23,707	-85.6%
Maui County	3,730	4,051	8.6%	638	4,051	-84.2%
Maui	3,603	3,928	9.0%	624	3,928	-84.1%
Moloka'i	113	46	-59.5%	22	46	-52.4%
Lāna'i	277	130	-52.9%	3	130	-97.5%
Kaua'i	653	914	40.0%	134	914	-85.3%
Island of Hawai'i	4,688	6,001	28.0%	1,252	6,001	-79.1%

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 Dec. 2020P	YTD Dec. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	1,386	2,361	70.3%	111	2,361	-95.3%
True Independent (Net)	10,774	14,390	33.6%	2,257	14,390	-84.3%
Leisure vs business						
Pleasure (Net)	14,305	18,934	32.4%	2,780	18,934	-85.3%
MCI (Net) *	1,909	2,670	39.8%	370	2,670	-86.1%
Convention/Conf.	1,129	904	-19.9%	188	904	-79.2%
Corp. Meetings	117	413	254.6%	60	413	-85.4%
Incentive *	739	1,469	98.8%	176	1,469	-88.0%

Taiwan: First Timers vs. Repeat Visitors

TAIWAN (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
1st timers (%)	69.7	70.0	0.2	62.9	70.0	-7.1
Repeaters (%)	30.3	30.0	-0.2	37.1	30.0	7.1

Tax Revenue

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

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