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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 had 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 2017, HTA continues to focus on sustaining and increasing direct air services from Taiwan to Hawai'i, expand travel trade education and collaboration, grow online and social media connectivity to create topics and exposure for Hawaiian Islands, and develop integrated consumer promotional campaigns to keep Hawai'i "top of mind" among Taiwanese consumers.

January 2017 Quick Facts¹

Visitor Expenditures: \$4.1 million
Primary Purpose of Stay: Pleasure (1,576) vs. MCI (78)
Average Length of Stay: 6.98 days
First Time Visitors: 80.9%
Repeat Visitors: 19.1%

TAIWAN (by Air)	2015	2016P	% Change 2016P vs 2015	2017 Forecast	% Change 2016P vs 2017 Forecast	YTD Jan. 2017P	YTD Jan. 2016F	% change YTD
Visitor Expenditures* (\$ Millions)	30.9	36.2	17.0%	38.8	7.1%	4.1	3.2	28.8%
Visitor Days	139,453	145,984	4.7%	153,284	5.0%	13,968	9,944	40.5%
Arrivals	17,525	18,410	5.0%	19,331	5.0%	2,000	1,508	32.6%
Per Person Per Day Spending* (\$)	221.8	247.9	11.8%	252.9	2.0%	291.9	318.4	-8.3%
Per Person Per Trip Spending* (\$)	1,765.0	1,966.3	11.4%	2,005.3	2.0%	2,038.0	2,099.1	-2.9%
Length of Stay (days)	7.96	7.93	-0.3%	7.93	0.0%	6.98	6.59	5.9%

*Excludes supplemental business spending

Contact Information

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

Hawai'i Tourism Taiwan: Andrew Koh
Managing Director
Tel: 886 (2) 2503-2351
andrewkoh@hawaiiitourism.com.tw

¹ 2016 and 2017 data are preliminary
As of February 27, 2017



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Market Summary

- In 2016, arrivals from Taiwan to Hawai'i rose 5% year over year to 18,410 visitors and total visitor expenditures increased 17 percent to \$36.2 million. In January 2017, arrivals rose 32.6 percent to 2,000 visitors. Despite lower daily spending (-8.3% to \$291.9 per person), visitor expenditures rose 28.8% to \$4.1 million.
- In 2016, Taiwanese visitors to O'ahu, Island of Hawai'i, Maui and Kaua'i were at 89%, 34%, 19% and 4%, respectively. In January 2017, 79% went to O'ahu, 32% to Island of Hawai'i, 21% went to Maui, and 1% went to Kaua'i.
- In 2016, the average length of stay of Taiwanese visitors was 7.93 days. In January 2017, the average length of stay was 6.98 days.
- In 2016, 41% of visitors from Taiwan were repeat visitors. In January 2017, repeat visitors comprised 19.1%.
- In 2016, only 9.7% of all visitors to Hawai'i from Taiwan came on group tours. In January 2017, group tour increased to 10.8%.
- For 2016, 16.3% of Taiwanese visitors came for MCI purposes. In January 2017, 3.9% were MCI visitors.
- Airlift: In 2016, seat inventory was increased by 3.5% to 32,408 seats. In January 2017, air capacity rose 12% to 2,781 seats.

Market Conditions

- Taiwan Government revised its economic forecast for 2017 to a GDP growth of 1.87%, which is slightly higher than the previous projection of 1.47% in year over year growth.
- Currency exchange rate fluctuations (e.g. Taiwan dollar's depreciation against USD and appreciation against other currencies) impact Taiwanese decision making in oversea destination visitation and spending.
- 2016 Taiwan total outbound reached 14.58 million, a 10.66% increase year over year. 92% of total outbound were to short haul Asia destinations. Japan is still the number one destination, receiving nearly 4.3 million Taiwanese visitors in 2016.
- Forecast for the 2017 Taiwanese outbound to the U.S. will have a growth rate of 3-4% to reach 480,000 arrivals. Currently, there are no additional direct flights being added to U.S. destinations, and Delta Airlines has stopped their Taiwan to U.S., via Japan route.
- There are increased affordable and attractive offerings from nearby destinations to entice Taiwanese visitors.
- Hawai'i expects sustained air seats from Taiwan and strives for enhanced air capacity with additional seasonal and/or regular scheduled flights.



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Visitor Statistics

TAIWAN (by Air)	2013	2014R	2015	2016P	% Change 2016P vs 2015	2017 Forecast	% Change 2016P vs 2017 Forecast	YTD Jan. 2017P	YTD Jan. 2016F	% change YTD
Visitor Expenditures* (\$ Millions)	41.3	34.6	30.9	36.2	17.0%	38.8	7.1%	4.1	3.2	28.8%
Visitor Days	173,622	169,145	139,453	145,984	4.7%	153,284	5.0%	13,968	9,944	40.5%
Arrivals	22,679	20,440	17,525	18,410	5.0%	19,331	5.0%	2,000	1,508	32.6%
Per Person Per Day Spending* (\$)	237.9	204.3	221.8	247.9	11.8%	252.9	2.0%	291.9	318.4	-8.3%
Per Person Per Trip Spending* (\$)	1,821.3	1,690.6	1,765.0	1,966.3	11.4%	2,005.3	2.0%	2,038.0	2,099.1	-2.9%
Length of Stay (days)	7.66	8.28	7.96	7.93	-0.3%	7.93	0.0%	6.98	6.59	5.9%

*Excludes supplemental business spending

Taiwan: Distribution by Island

TAIWAN (by Air)	2013	2014R	2015	2016P	% Change 2016P vs 2015	YTD Jan. 2017P	YTD Jan. 2016F	% change YTD
O'ahu	20,774	19,008	16,437	16,332	-0.6%	1,573	1,411	11.4%
Maui County	5,917	3,539	3,788	3,569	-5.8%	419	149	180.8%
...Maui	5,842	3,528	3,784	3,504	-7.4%	419	149	180.8%
...Moloka'i	75	30	138	257	85.9%	1	1	-1.0%
...Lāna'i	454	14	28	9	-67.7%	0	0	0%
Kaua'i	771	819	1,282	748	-41.7%	11	43	-75.5%
Island of Hawai'i	5,848	4,234	5,481	6,191	12.9%	645	232	178.4%

Taiwan: Airlift

	2017					2016					2017 vs. 2016 (%)				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Taipei	7,473	7,455	7,982	8,270	31,180	7,238	7,982	7,982	9,206	32,408	3.2%	-6.6%	0.0%	-10.2%	-3.8%

Source: Diio Mii airline schedules

Taiwan: Group vs. FIT; Leisure vs. Business

TAIWAN (by Air)	2013	2014R	2015	2016P	% Change 2016P vs 2015	YTD Jan. 2017P	YTD Jan. 2016F	% change YTD
Group vs FIT								
Group tour	4,858	1,806	986	1,786	81.1%	217	349	-37.9%
True Independent	10,473	11,843	9,550	10,544	10.4%	1,474	572	157.8%
Leisure vs business								
Pleasure (Net)	16,812	15,478	12,430	13,827	11.2%	1,576	1,059	48.8%
MCI (Net)	2,775	2,357	3,917	2,995	-23.5%	78	55	40.8%
Convention/Conf.	1,230	1,796	2,891	1,668	-42.3%	76	9	797.4%
Corp. Meetings	800	486	678	791	16.7%	1	47	-97.7%
Incentive	771	140	363	590	62.5%	0	0	0%



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Taiwan: First Timers vs. Repeat Visitors

TAIWAN (by Air)	2013	2014R	2015	2016P	% Change 2016P vs 2015	YTD Jan. 2017P	YTD Jan. 2016F	% change YTD
1st timers (%)	60.3	74.4	61.0	59	2.0	80.9	65.8	15.1
Repeaters (%)	39.7	25.6	39.0	41	-2.0	19.1	34.2	-15.1

Tax Revenue

TAIWAN (by Air)	2013	2014R	2015	2016P	% Change 2016P vs 2015	YTD Jan. 2017P	YTD Jan. 2016F	% change YTD
State tax revenue generated* (\$ Millions)	4.40	3.68	3.29	3.86	17.0%	0.43	0.34	28.8%

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