



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 2018, 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.

Year-to-Date March 2018 Quick Facts¹

Visitor Expenditures: \$10.6 million
 Primary Purpose of Stay: Pleasure (3,724) vs. MCI (419)
 Average Length of Stay: 8.95 days
 First Time Visitors: 74.1%
 Repeat Visitors: 25.9%

	2016	2017P	% Change 2017P vs 2016	2018 Forecast (Feb. 2018)	% Change 2017P vs 2018 Forecast	YTD Mar. 2018P	YTD Mar. 2017P	% change YTD
TAIWAN (by Air)								
Visitor Expenditures* (\$ Millions)	38.1	37.3	-2.2%	38.0	2.0%	10.6	9.9	7.1%
Visitor Days	143,895	152,735	6.1%	155,790	2.0%	39,144	36,884	6.1%
Arrivals	18,107	18,767	3.6%	19,143	2.0%	4,376	4,812	-9.1%
Per Person Per Day Spending* (\$)	264.9	244.1	-7.8%	244.1	0.0%	269.7	267.4	0.9%
Per Person Per Trip Spending* (\$)	2,104.9	1,986.7	-5.6%	1,986.7	0.0%	2,413.0	2,049.5	17.7%
Length of Stay (days)	7.95	8.14	2.4%	8.14	0.0%	8.95	7.67	16.7%

*Excludes supplemental business spending

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¹ 2016 visitor data are the final numbers and reflect data from the National Travel and Tourism Office and updated reports from airlines. 2017 and 2018 data are preliminary

Market Summary

- In 2017, arrivals from Taiwan to Hawai'i rose 3.6 percent to 18,767 visitors. However, lower daily spending (-7.8% to \$244 per person), resulted in a 2.2 percent decrease in visitor expenditures to \$37.3 million. Through the first three months of 2018, visitor expenditures gained 7.1 percent to \$10.6 million. Arrivals decreased (-9.1% to 4,376 visitors) but a longer average length of stay (+16.7% to 8.95 days) led to a 6.1 percent growth in visitor days. Daily spending of \$270 per person (+0.9%) was slightly higher compared to the first three months of 2017.
- In 2017, 96% visitors from Taiwan went to O'ahu, 27% to Island of Hawai'i, 14% went to Maui, and 5% went to Kaua'i. Through March 2018, Taiwanese visitors to O'ahu, Island of Hawai'i, Maui and Kaua'i were at 98%, 33%, 17% and 1%, respectively.
- In 2017, 28.5% of visitors from Taiwan were repeat visitors. Through March 2018, repeat visitors comprised 25.9%.
- In 2017, 13.3% of all visitors to Hawai'i from Taiwan came on group tours. Through March 2018, group tour was 11.5%.
- For 2017, 14% of Taiwanese visitors came for MCI purposes. Through March 2018, 9.6% were MCI visitors.
- Airlift: In 2017, air capacity to Hawai'i from Taiwan decreased 3.8% to 31,186 seats. Through March 2018, air capacity increased 2.4% to 7,650 seats.

Market Conditions

- Taiwan Government revised its economic forecast for 2018 to a GDP growth of 3.2%, which is higher than previously projected. Unemployment rate for 2018 is estimated at 3.7%, similar to the year before.
- Currency exchange rate fluctuations impact Taiwanese decision making in oversea destination visitation and spending.
- 2017 Taiwan total outbound reached 15.6 million, a 7.3% increase year over year. 92% of total outbound were to short haul Asia destinations.
- Forecast for the 2018 Taiwanese outbound to the U.S. will have a growth rate of 3% to reach 482,000 arrivals.
- There are increased affordable and attractive offerings from nearby destinations to entice Taiwanese visitors.
- Taiwanese travelers are heavy social media users with 77% penetration rate for Facebook, followed by 75% for YouTube.
- Since the launch of new A350 in November 2017, load factor for China Airlines has been improved with an average of more than 85%. Hawai'i continues to strive for additional air capacity with seasonal and/or regular scheduled flights.
- HTT and China Airlines worked on a co-op campaign to address the typical slow period after Chinese New Year Holiday travel season. A billboard ad will be shown at one of the busiest MRT stations in Taipei throughout March to promote the Hawaiian Islands.
- In March, HTT also launched the 'Aloha with Locals' filming project to take place on the island of O'ahu, Kaua'i, and Maui. The first batch of videos will be ready for broadcast in May, in time for targeting summer vacation travelers.

Taiwan: Distribution by Island

TAIWAN (by Air)	2016	2017P	% Change 2017P vs 2016	YTD Mar. 2018P	YTD Mar. 2017P	% change YTD
O'ahu	16,107	18,007	11.8%	4,289	4,305	-0.4%
Maui County	3,496	2,778	-20.5%	752	790	-4.9%
...Maui	3,430	2,717	-20.8%	752	765	-1.8%
...Moloka'i	263	31	-88.2%	41	24	68.8%
...Lāna'i	9	46	408.2%	62	4	1337.8%
Kaua'i	744	983	32.0%	63	330	-81.0%
Island of Hawai'i	6,007	5,018	-16.5%	1,438	1,298	10.8%

Taiwan: Airlift

Departure City	2018					2017					% CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Taipei	7,650	7,956	8,262	7,956	31,824	7,473	7,461	7,982	8,270	31,186	2.4	6.6	3.5	-3.8	2.0

Source: Diio Mii airline schedules, updated March 2018

Taiwan: Group vs. FIT; Leisure vs. Business

TAIWAN (by Air)	2016	2017P	% Change 2017P vs 2016	YTD Mar. 2018P	YTD Mar. 2017P	% change YTD
Group vs FIT						
Group tour	1,753	2,490	42.1%	502	511	-1.8%
True Independent	10,346	10,193	-1.5%	2,439	3,410	-28.5%
Leisure vs business						
Pleasure (Net)	13,508	14,567	7.8%	3,724	3,860	-3.5%
MCI (Net)	2,947	2,631	-10.7%	419	261	60.2%
Convention/Conf.	1,646	557	-66.1%	135	80	69.3%
Corp. Meetings	791	848	7.2%	58	2	2597.6%
Incentive	561	1,233	120.0%	253	179	40.7%

Taiwan: First Timers vs. Repeat Visitors

TAIWAN (by Air)	2016	2017P	Change 2017P vs 2016	YTD Mar. 2018P	YTD Mar. 2017P	% change YTD
1st timers (%)	59.2	71.5	12.3	74.1	69.6	4.6
Repeaters (%)	40.8	28.5	-12.3	25.9	30.4	-4.6

Tax Revenue

TAIWAN (by Air)	2016	2017P	% Change 2017P vs 2016	YTD Mar. 2018P	YTD Mar. 2017P	% change YTD
State tax revenue generated* (\$ Millions)	4.45	4.35	-2.2%	1.23	1.15	7.1%

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

Industry

Major Tour Operators

The list below shows the top tour operators in Taiwan in relation to market share. This is based on total number of passengers to Hawai'i.

- Lion Travel
- Cola Tour
- Phoenix Tour
- SET Tour
- Dragon Tours