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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 2016, 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 November 2016 Quick Facts<sup>1</sup>

Visitor Expenditures: \$33.3 million  
Primary Purpose of Stay: Pleasure (12,651) vs. MCI (2,264)  
Average Length of Stay: 8.01 days  
First Time Visitors: 62.1%  
Repeat Visitors: 37.9%

TAIWAN (by Air)	2014R	2015	% Change 2015 vs 2014R	2016 Forecast (Oct. 2015)	% Change 2015 vs 2016 Forecast	YTD Nov. 2016P	YTD Nov. 2015F	% change YTD
Visitor Expenditures* (\$ Millions)	34.6	30.9	-10.5%	30.2	-2.5%	33.3	28.2	18.2%
Visitor Days	169,145	139,453	-17.6%	130,035	-6.8%	130,754	127,184	2.8%
Arrivals	20,440	17,525	-14.3%	16,541	-5.6%	16,314	15,950	2.3%
Per Person Per Day Spending* (\$)	204.3	221.8	8.6%	231.9	4.6%	255.0	221.8	14.9%
Per Person Per Trip Spending* (\$)	1,690.6	1,765.0	4.4%	1,823.2	3.3%	2,043.5	1,768.7	15.5%
Length of Stay (days)	8.28	7.96	-3.8%	7.86	-1.2%	8.01	7.97	0.5%

\*Excludes supplemental business spending

### Contact Information

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

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

<sup>1</sup> Data for 2014R and 2015 were revised based on updated statistics from the Federal Office of Travel and Tourism Industries (OTTI) and from updated reports from airlines. 2016 data are preliminary.



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### Market Summary

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- In 2015, arrivals from Taiwan to Hawai'i dropped 14.3% year over year to 17,525 visitors and total visitor expenditures decreased 10.5 percent to \$30.9 million. Through November 2016, arrivals rose 2.3 percent to 16,314 visitors. Higher daily spending (+14.9% to \$255 per person) also contributed to a 18.2% percent gain in visitor expenditures to \$33.3 million.
- In 2015, Taiwanese visitors to O'ahu, Island of Hawai'i, Maui and Kaua'i were at 94%, 31%, 22% and 7%, respectively. Through November 2016, 89% went to O'ahu, 34% to Island of Hawai'i, 20% went to Maui, and 5% went to Kaua'i.
- In 2015, the average length of stay of Taiwanese visitors was 7.96 days. Through November 2016, the average length of stay was 8 days.
- In 2015, 39% of visitors from Taiwan were repeat visitors. Through November 2016, repeat visitors comprised 37.9%.
- In 2015, only 5.6% of all visitors to Hawai'i from Taiwan came on group tours. Through November 2016, group tour increased to 10.0%.
- For 2015, 22.3% of Taiwanese visitors came for MCI purposes. Through November 2016, 13.9% were MCI visitors.
- Airlift: In 2015, seat inventory was reduced by 29.8% to 31,308 seats. Through November 2016, air capacity declined 2% to 29,408 seats.

### Market Conditions

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- Taiwan Government lowered its economic forecast for 2016 to a GDP growth of 1.47 as China's slowdown weighs on export demand. This was less than the previous projection of 2.3% growth in GDP.
- 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.
- 2015 Taiwan total outbound reached 13.18 million, a 11% increase year over year. 94% of all were to short-haul Asia destinations. Japan received nearly 3.8 million Taiwanese visitors in 2015.
- Forecast for the 2016 Taiwanese outbound to the U.S. is 6% in year over year growth to 474,000 total arrivals per U.S. Department of Commerce.
- U.S. visa waiver program has not impacted visitor volume to U.S. as much as anticipated as obtaining a visa was not a big issue in the past for Taiwanese visitors.
- 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)	2012	2013	2014R	2015	% Change 2015 vs 2014R	2016 Forecast (Oct. 2015)	% Change 2015 vs 2016 Forecast	YTD Nov. 2016P	YTD Nov. 2015F	% change YTD
Visitor Expenditures* (\$ Millions)	NA	41.3	34.6	30.9	-10.5%	30.2	-2.5%	33.3	28.2	18.2%
Visitor Days	84,643	173,622	169,145	139,453	-17.6%	130,035	-6.8%	130,754	127,184	2.8%
Arrivals	8,769	22,679	20,440	17,525	-14.3%	16,541	-5.6%	16,314	15,950	2.3%
Per Person Per Day Spending* (\$)	NA	237.9	204.3	221.8	8.6%	231.9	4.6%	255.0	221.8	14.9%
Per Person Per Trip Spending* (\$)	NA	1,821.3	1,690.6	1,765.0	4.4%	1,823.2	3.3%	2,043.5	1,768.7	15.5%
Length of Stay (days)	9.65	7.66	8.28	7.96	-3.8%	7.86	-1.2%	8.01	7.97	0.5%

\*Excludes supplemental business spending

## Taiwan: Distribution by Island

TAIWAN (by Air)	2012	2013	2014R	2015	% Change 2015 vs 2014R	YTD Nov. 2016P	YTD Nov. 2015F	% change YTD
O'ahu	7,852	20,774	19,008	16,437	-13.5%	14,575	14,873	-2.0%
Maui County	1,633	5,917	3,539	3,788	7.0%	3,304	3,552	-7.0%
...Maui	1,621	5,842	3,528	3,784	7.2%	3,293	3,547	-7.2%
...Moloka'i	11	75	30	138	357.9%	176	138	27.2%
...Lāna'i	89	454	14	28	98.1%	9	28	-69.2%
Kaua'i	380	771	819	1,282	56.5%	764	1,145	-33.3%
Island of Hawai'i	1,699	5,848	4,234	5,481	29.5%	5,549	5,177	7.2%

## Taiwan: Airlift

	2016 Outlook					2015					2016 Outlook vs. 2015 (%)				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Taipei	7,238	7,982	7,982	7,424	30,626	7,675	7,982	8,289	7,362	31,308	-5.7%	0.0%	-3.7%	0.8%	-2.2%

Source: Diio Mii airline schedules

## Taiwan: Group vs. FIT; Leisure vs. Business

TAIWAN (by Air)	2012	2013	2014R	2015	% Change 2015 vs 2014R	YTD Nov. 2016P	YTD Nov. 2015F	% change YTD
Group vs FIT								
Group tour	980	4,858	1,806	986	-45.4%	1,624	843	92.5%
True Independent	4,904	10,473	11,843	9,550	-19.4%	9,270	8,155	13.7%
Leisure vs business								
Pleasure (Net)	6,608	16,812	15,478	12,430	-19.7%	12,651	11,159	13.4%
MCI (Net)	1,266	2,775	2,357	3,917	66.2%	2,264	3,699	-38.8%
Convention/Conf.	1,038	1,230	1,796	2,891	61.0%	1,178	2,683	-56.1%
Corp. Meetings	158	800	486	678	39.5%	555	676	-18.0%
Incentive	107	771	140	363	160.2%	585	354	65.0%



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### Taiwan: First Timers vs. Repeat Visitors

TAIWAN (by Air)	2012	2013	2014R	2015	% Change 2015 vs 2014R	YTD Nov. 2016P	YTD Nov. 2015F	% change YTD
1st timers (%)	57.7	60.3	74.4	61.0	-13.4	62.1	61.3	0.8%
Repeaters (%)	42.3	39.7	25.6	39.0	13.4	37.9	38.7	-0.8%

### Tax Revenue

TAIWAN (by Air)	2012	2013	2014R	2015	% Change 2015 vs 2014R	YTD Nov. 2016P	YTD Nov. 2015F	% change YTD
State tax revenue generated* (\$ Millions)	NA	4.40	3.68	3.29	-10.5%	3.55	3.00	18.2%

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