



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.

July 2017 Quick Facts¹

Visitor Expenditures: \$21.8 million
 Primary Purpose of Stay: Pleasure (8,686) vs. MCI (1,407)
 Average Length of Stay: 7.58 days
 First Time Visitors: 68.3%
 Repeat Visitors: 31.7%

TAIWAN (by Air)	2015	2016P	% Change 2016P vs 2015	2017 Forecast	% Change 2016P vs 2017 Forecast	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
Visitor Expenditures* (\$ Millions)	30.9	36.2	17.0%	38.8	7.1%	21.8	22.5	-3.0%
Visitor Days	139,453	145,984	4.7%	153,284	5.0%	84,717	85,206	-0.6%
Arrivals	17,525	18,410	5.0%	19,331	5.0%	11,175	11,167	0.1%
Per Person Per Day Spending* (\$)	221.8	247.9	11.8%	252.9	2.0%	257.9	264.3	-2.4%
Per Person Per Trip Spending* (\$)	1,765.0	1,966.3	11.4%	2,005.3	2.0%	1,955.1	2,016.4	-3.0%
Length of Stay (days)	7.96	7.93	-0.3%	7.93	0.0%	7.58	7.63	-0.6%

*Excludes supplemental business spending

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¹ 2016 and 2017 data are preliminary

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. Through July 2017, arrivals of 11,175 visitors were comparable to year-to-date 2016. Lower daily spending (-2.4% to \$258 per person), resulted in a 3 percent decrease in visitor expenditures to \$21.8 million.
- In 2016, Taiwanese visitors to O'ahu, Island of Hawai'i, Maui and Kaua'i were at 89%, 34%, 19% and 4%, respectively. Through July 2017, 94% went to O'ahu, 23% to Island of Hawai'i, 12% went to Maui, and 4% went to Kaua'i.
- In 2016, the average length of stay of Taiwanese visitors was 7.93 days. Through July 2017, the average length of stay was 7.58 days.
- In 2016, 41% of visitors from Taiwan were repeat visitors. Through July 2017, repeat visitors comprised 31.7%.
- In 2016, 9.7% of all visitors to Hawai'i from Taiwan came on group tours. Through July 2017, group tour was 12.6%.
- For 2016, 16.3% of Taiwanese visitors came for MCI purposes. Through July 2017, 11.5% were MCI visitors.
- Airlift: In 2016, seat inventory was increased by 3.5% to 32,408 seats. Through July 2017, air seats air capacity decreased (-1.6% to 17,697 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.
- In July, the annual Hawai'i Month at Fullon Hotel in Fulong began on July 22nd. HTT presented hula performances on the opening day to attract attention from the hotel guests. This event will last for two months till the end of September. The employees of Fullon Hotel also had a chance to learn Hawaiian dances from our arranged employee hula classes. Hawaiian music and hula dances will be showcased at Fullon Hotel throughout the Hawai'i Month.

Visitor Statistics

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*Excludes supplemental business spending

Taiwan: Distribution by Island

TAIWAN (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
O'ahu	16,437	16,332	-0.6%	10,561	10,435	1.2%
Maui County	3,788	3,569	-5.8%	1,383	2,225	-37.8%
...Maui	3,784	3,504	-7.4%	1,328	2,221	-40.2%
...Moloka'i	138	257	85.9%	24	172	-85.8%
...Lāna'i	28	9	-67.7%	36	2	1560.9%
Kaua'i	1,282	748	-41.7%	449	602	-25.4%
Island of Hawai'i	5,481	6,191	12.9%	2,561	2,971	-13.8%

Taiwan: Airlift

DepCity	2017					2016					CHANGE2017 vs. 2016 (%)				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Taipei	7,473	7,461	7,982	8,270	31,186	7,238	7,982	7,982	9,206	32,408	3.2%	-6.5%	0.0%	-10.2%	-3.8%

Source: Diio Mii airline schedules, updated June 2017

Taiwan: Group vs. FIT; Leisure vs. Business

TAIWAN (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
Group vs FIT						
Group tour	986	1,786	81.1%	1,407	1,257	11.9%
True Independent	9,550	10,544	10.4%	6,201	5,498	12.8%
Leisure vs business						
Pleasure (Net)	12,430	13,827	11.2%	8,686	8,789	-1.2%
MCI (Net)	3,917	2,995	-23.5%	1,280	1,363	-6.1%
Convention/Conf.	2,891	1,668	-42.3%	423	629	-32.7%
Corp. Meetings	678	791	16.7%	106	509	-79.3%
Incentive	363	590	62.5%	753	227	231.6%

Taiwan: First Timers vs. Repeat Visitors

TAIWAN (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
1st timers (%)	61.0	59	2.0	68.3	63.7	4.6
Repeaters (%)	39.0	41	-2.0	31.7	36.3	-4.6

Tax Revenue

TAIWAN (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
State tax revenue generated* (\$ Millions)	3.29	4.23	28.3%	2.55	2.63	-3.0%

*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