



## 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, BrandStory Asia to provide destination representation services for the Hawaiian Islands in Taiwan effective January 1, 2020. BrandStory 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.

### January 2020 Quick Facts<sup>1</sup>

Visitor Expenditures: \$4.3 million  
 Primary Purpose of Stay: Pleasure (1,476) vs. MCI (325)  
 Average Length of Stay: 9.70 days  
 First Time Visitors: 59.6%  
 Repeat Visitors: 40.4%

TAIWAN (by Air)	2018	2019P	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
Visitor Expenditures* (\$ Millions)	39.1	58.0	48.5%	NA	NA	4.3	5.0	-13.2%
Visitor Days	162,220	232,692	43.4%	NA	NA	18,749	19,505	-3.9%
Arrivals	17,523	25,885	47.7%	NA	NA	1,932	1,860	3.9%
Per Person Per Day Spending* (\$)	240.8	249.4	3.5%	NA	NA	231.7	256.8	-9.7%
Per Person Per Trip Spending* (\$)	2,229.6	2,241.6	0.5%	NA	NA	2,248.5	2,692.2	-16.5%
Length of Stay (days)	9.26	8.99	-2.9%	NA	NA	9.70	10.49	-7.5%

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

### Contact Information

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<sup>1</sup> 2020 and 2019 visitor data are preliminary. 2018 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

## Market Summary

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- In 2019, visitor spending rose significantly (+48.5% to \$58.0 million), boosted by increased arrivals (+47.7% to 25,885 visitors) and higher daily spending (+3.5% to \$249 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. In January 2020 visitor spending declined (-13.2% to \$4.3 million). Arrivals increased (+3.9% to 1,932 visitors), but the average length of stay was shorter (-7.5% to 9.70 days) and daily spending was down (-9.7% to \$232 per person) compared to January 2019.
- In 2019, 97.9 percent visitors from Taiwan went to O'ahu, 25.1 percent to the island of Hawai'i, 15.9 percent went to Maui, and 3.8 percent went to Kaua'i. In January 2020, Taiwanese visitors to O'ahu, the island of Hawai'i, Maui, and Kaua'i were at 96.4 percent, 42.7 percent, 17.6 percent, and 5.8 percent, respectively.
- In 2019, 30.0 percent of visitors from Taiwan were repeat visitors. In January 2020, repeat visitors comprised 40.4 percent.
- In 2019, 9.6 percent of all visitors to Hawai'i from Taiwan came on group tours. In January 2020, group tour arrivals made up 3.3 percent.
- In 2019, air capacity to Hawai'i from Taiwan increased 25.0 percent to 39,780 scheduled seats. In January 2020, air capacity was unchanged from January 2019 at 2,754 seats.

## Market Conditions

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- The Taiwan Institute of Economic Research (TIER) has raised its forecast for Taiwan's GDP growth for 2020 to 2.7 percent, on the back of higher than expected domestic demand at a time when many Taiwanese companies are investing more at home.
- From January to November 2019, Taiwan total outbound visitation was up 3.4 percent compared to the same period in 2018. Through November 2019, visitation to the U.S. decreased 3.3 percent year-over-year.
- Taiwan's presidential election was on Jan 11, 2020. Tsai Ing-wen retained the presidency with her Democratic Progressive Party maintaining a majority in the legislature. According to FocusEconomics, this will ensure a continuation of current pro-growth economic policies. In particular, infrastructure development plans and ongoing efforts to encourage Taiwanese companies to re-shore capital should boost investment.
- Taiwanese startup airline StarLux Airlines Co. Ltd. launched inaugural flight between Taiwan to Macao, Da Nang, and Penang in January 2020. Due to Wuhan coronavirus outbreak, the Macao route is suspended from February to March 2020. The plan of direct flights between Taipei and Cebu, the Philippines on April 6, 2020, is still on schedule.
- China Airlines and Eva Air are both increasing airlifts and presence in Southeast Asia. Not only because of the potential of Taiwan visitors to the region, the carriers are positioning themselves as the choice for Southeast Asia visitors traveling to North America.
- Taiwanese prefers to take short term travels between 1-4 days, according to a report by Booking.com released in 2019. Top three most popular travel themes in Taiwan are sightseeing (87%), food (81%), citywalk (73%) which is different from the international preference of beach vacation (60%), sightseeing (59%), and citywalk (58%).

## Distribution by Island

TAIWAN (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
O'ahu	16,883	25,339	50.1%	1,863	1,845	1.0%
Maui County	3,730	4,238	13.6%	343	385	-11.0%
Maui	3,603	4,107	14.0%	340	385	-11.6%
Moloka'i	113	55	-51.5%	1	0	NA
Lāna'i	277	136	-50.7%	1	2	-54.6%
Kaua'i	653	971	48.8%	113	201	-44.0%
Island of Hawai'i	4,688	6,489	38.4%	824	447	84.4%

## Airlift

Departure City	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Taipei	8,262	12,546	11,934	10,710	43,452	7,956	10,710	11,934	9,180	39,780	3.8	17.1	0.0	16.7	9.2

Source: Diio Mii airline schedules, updated February 26, 2020

## Group vs. True Independent; Leisure vs. Business

TAIWAN (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
Group vs True Independent (Net)						
Group tour	1,386	2,478	78.8%	63	28	123.2%
True Independent (Net)	10,774	15,436	43.3%	1,234	1,065	15.8%
Leisure vs business						
Pleasure (Net)	14,305	20,324	42.1%	1,476	1,443	2.3%
MCI (Net) *	1,909	2,798	46.5%	325	78	314.1%
Convention/Conf.	1,129	970	-14.1%	174	75	131.9%
Corp. Meetings	117	434	272.2%	56	2	2440.7%
Incentive *	739	1,515	105.1%	147	1	12753.8%

## Taiwan: First Timers vs. Repeat Visitors

TAIWAN (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
1st timers (%)	69.7	70.0	0.3	59.6	57.1	2.5
Repeaters (%)	30.3	30.0	-0.3	40.4	42.9	-2.5

## Tax Revenue

TAIWAN (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
State tax revenue generated* (\$ Millions)	4.56	6.77	48.5%	0.51	0.58	-13.2%

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