



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

Year-to-date July 2020 Quick Facts¹

Visitor Expenditures: NA (Not Available)
 Primary Purpose of Stay: Pleasure (2,732) vs. MCI (370)
 Average Length of Stay: 9.78 days
 First Time Visitors: 63.7%
 Repeat Visitors: 36.3%

TAIWAN (by Air)	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD July 2020P	YTD July 2019	% change YTD
Visitor Expenditures* (\$ Millions)	39.1	54.8	40.2%	NA	NA	NA	37.9	NA
Visitor Days	162,220	218,207	34.5%	NA	NA	33,905	150,835	-77.5%
Arrivals	17,523	24,242	38.3%	NA	NA	3,468	16,512	-79.0%
Average Daily Census	444	598	34.5%			159	711	-77.6%
Per Person Per Day Spending* (\$)	240.8	251.0	4.2%	NA	NA	NA	251.2	NA
Per Person Per Trip Spending* (\$)	2,229.6	2,259.0	1.3%	NA	NA	NA	2,294.9	NA
Length of Stay (days)	9.26	9.00	-2.8%	NA	NA	9.78	9.13	7.0%

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

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

Market Summary

Due to the COVID-19 pandemic, all passengers arriving from out-of-state during July were required to abide by a mandatory 14-day self-quarantine. Exemptions include travel for essential reasons like work or healthcare. The U.S. Centers for Disease Control and Prevention (CDC) also continued to enforce its “No Sail Order” on all cruise ships.

Five visitors came in July compared to 2,301 visitors a year ago. Visitor spending data were not available.

- Through the first seven months of 2020, arrivals decreased 79.0 percent to 3,468 visitors. Visitor days declined 77.5 percent. The average daily census showed 159 visitors per day, a 77.6 percent drop compared to the first seven months of 2019.
- Through the first seven months of 2020, O‘ahu, the island of Hawai‘i, Maui, and Kaua‘i received 97.4 percent, 35.8 percent, 17.3 percent, and 3.8 percent of Taiwanese visitors, respectively. Repeat visitors comprised 36.3 percent. Group tour arrivals made up 2.9 percent.
- Through the first seven months of 2020, air capacity dropped 67.6 percent to 7,344 seats.
- In 2019, visitor spending rose significantly (+40.2% to \$54.8 million), boosted by increased arrivals (+38.3% to 24,242 visitors) and higher daily spending (+4.2% to \$251 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. The average daily census showed 598 visitors per day in 2019, up 34.5 percent compared to 2018.
- In 2019, 97.8 percent visitors from Taiwan went to O‘ahu, 24.8 percent to the island of Hawai‘i, 16.2 percent went to Maui, and 3.8 percent went to Kaua‘i. In 2019, 30.0 percent of visitors from Taiwan were repeat visitors; 9.7 percent of all visitors to Hawai‘i from Taiwan came on group tours.
- In 2019, air capacity to Hawai‘i from Taiwan increased 25.0 percent to 39,780 scheduled seats.

Market Conditions

- Taiwan Ministry of Health and Welfare and the United States Department of Health and Human Services signed the first MOU, marking a significant mark of the partnership on both sides.
- After a 5-month long ban on travel agencies, the restriction for organizing inbound and outbound group tours will not be extended after its deadline of August 31.
- In addition to Scoot’s weekly flights from Singapore to Taiwan, Singapore Airlines is resuming its 3 times weekly services to Taiwan in September.
- China Airlines, EVA Air, Starluxe Airlines and TigerAir Taiwan hosted “Mock Outbound Travel Experience” for consumers to enjoy a ride with in-flight meal and duty-free shopping without customs clearance. Hence, no quarantine required after the trip.
- Considering the still severe COVID-19 pandemic around the world, both China Airlines and EVA Air extends deadline for free cancellation and one-time date change of flight tickets to Q4 2020.
- Domestic travel, especially island travel and resort holidays, continue to be popular among Taiwanese given outbound travel is still not available at the moment. Travel agencies reorganized to reinforce its ability to accommodate the need of consumers.

Distribution by Island

TAIWAN (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
O'ahu	16,883	23,707	40.4%	3,379	16,184	-79.1%
Maui County	3,730	4,051	8.6%	616	3,044	-79.8%
Maui	3,603	3,928	9.0%	601	2,960	-79.7%
Moloka'i	113	46	-59.5%	22	0	N/A
Lāna'i	277	130	-52.9%	3	123	-97.4%
Kaua'i	653	914	40.0%	133	651	-79.6%
Island of Hawai'i	4,688	6,001	28.0%	1,243	3,961	-68.6%

Airlift

Departure City	2020					2019					%CHANGE					
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	
Taipei	7,344			7,344	14,688	7,956	10,710	11,934	9,180	39,780	-7.7				-20.0	-63.1

Source: Diao Mii airline schedules. Updated July 29, 2020.

Group vs. True Independent; Leisure vs. Business

TAIWAN (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
Group vs True Independent (Net)						
Group tour	1,386	2,361	70.3%	100	1,841	-94.6%
True Independent (Net)	10,774	14,390	33.6%	2,205	9,591	-77.0%
Leisure vs business						
Pleasure (Net)	14,305	18,934	32.4%	2,732	12,753	-78.6%
MCI (Net) *	1,909	2,670	39.8%	370	2,147	-82.8%
Convention/Conf.	1,129	904	-19.9%	188	642	-70.7%
Corp. Meetings	117	413	254.6%	60	321	-81.3%
Incentive *	739	1,469	98.8%	176	1,274	-86.2%

Taiwan: First Timers vs. Repeat Visitors

TAIWAN (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
1st timers (%)	69.7	70.0	0.2	63.7	68.9	-5.2
Repeaters (%)	30.3	30.0	-0.2	36.3	31.1	5.2

Tax Revenue

TAIWAN (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
State tax revenue generated* (\$ Millions)	4.56	6.39	40.2%	NA	4.42	NA

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