



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 September 2020 Quick Facts ¹

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 Sep. 2020P	YTD Sep. 2019	% change YTD
Visitor Expenditures* (\$ Millions)	39.1	54.8	40.2%	NA	NA	NA	45.7	NA
Visitor Days	162,220	218,207	34.5%	NA	NA	34,387	182,460	-81.2%
Arrivals	17,523	24,242	38.3%	NA	NA	3,479	20,042	-82.6%
Average Daily Census	444	598	34.5%			125	668	-81.2%
Per Person Per Day Spending* (\$)	240.8	251.0	4.2%	NA	NA	NA	250.6	NA
Per Person Per Trip Spending* (\$)	2,229.6	2,259.0	1.3%	NA	NA	NA	2,281.8	NA
Length of Stay (days)	9.26	9.00	-2.8%	NA	NA	9.88	9.10	8.6%

*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 DIIO 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 September 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.

Taiwanese citizens are allowed to visit the U.S. but are also subject to restrictions if a traveler has gone to any of the following countries: China, Iran, Brazil or Europe in the past 14 days. Returning Taiwanese residents are required to quarantine for 14 days.

Four visitors came to Hawaii in September compared to 1,746 visitors a year ago. Visitor spending data were not available.

- Through the first nine months of 2020, arrivals decreased 82.6 percent to 3,479 visitors. Visitor days declined 81.2 percent. The average daily census showed 125 visitors per day, a 81.2 percent drop compared to the first nine months of 2019.
- Through the first nine months of 2020, O’ahu, the island of Hawai’i, Maui, and Kaua’i received 97.4 percent, 35.7 percent, 17.3 percent, and 3.8 percent of Taiwanese visitors, respectively. Repeat visitors comprised 36.5 percent. Group tour arrivals made up 2.9 percent.
- Through the first nine months of 2020, air capacity dropped 76.0 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

- Considering the on-going COVID-19 pandemic worldwide, The Ministry of Transportation of Taiwan announced to extend travel restrictions imposed on inbound group and outbound group tours until further notice.
- EVA Air and Starluxe Airlines announced to launch more charter flights to take travelers to tour Taiwan in the theme of Mid-Autumn Festival, Double Tenth Day, Halloween, Double 11 Single Day, Christmas, New Year’s Eve and Catching the First Dawn of 2021.
- China Airlines announced to commence three Japan flights with 2 weekly services from September 3. The airline also announced to increase frequency of its short haul services from Taiwan to the North and Southeast Asia destinations in October. The airline is still evaluating the timing to resume the Hawai’i route.
- Scoot announced to resume flights between Taiwan Taoyuan Airport and Tokyo Narita Airport as it gradually resumes services after disruptions caused by COVID-19.

- Japan based budget airline Peach Aviation will resume 3 Taiwan routes by end of October. Travelers can tap on the services to fly between Taiwan Taoyuan International Airport and Osaka, Narita and Haneda Tokyo, Japan.

Distribution by Island

TAIWAN (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P	YTD Sep. 2019	% change YTD
O'ahu	16,883	23,707	40.4%	3,389	19,637	-82.7%
Maui County	3,730	4,051	8.6%	616	3,506	-82.4%
Maui	3,603	3,928	9.0%	601	3,405	-82.3%
Moloka'i	113	46	-59.5%	22	17	25.9%
Lāna'i	277	130	-52.9%	3	123	-97.4%
Kaua'i	653	914	40.0%	133	749	-82.3%
Island of Hawai'i	4,688	6,001	28.0%	1,244	4,831	-74.3%

Airlift

Departure City	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Taipei	7,344	0	0	0	7,344	7,956	10,710	11,934	9,180	39,780	-7.7	-100.0	-100.0	-100.0	-81.5

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules as of October 27, 2020, subject to change.

Group vs. True Independent; Leisure vs. Business

TAIWAN (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P	YTD Sep. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	1,386	2,361	70.3%	100	2,085	-95.2%
True Independent (Net)	10,774	14,390	33.6%	2,217	11,726	-81.1%
Leisure vs business						
Pleasure (Net)	14,305	18,934	32.4%	2,733	15,689	-82.6%
MCI (Net) *	1,909	2,670	39.8%	370	2,445	-84.9%
Convention/Conf.	1,129	904	-19.9%	188	809	-76.7%
Corp. Meetings	117	413	254.6%	60	369	-83.7%
Incentive *	739	1,469	98.8%	176	1,381	-87.3%

Taiwan: First Timers vs. Repeat Visitors

TAIWAN (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P	YTD Sep. 2019	% change YTD
1st timers (%)	69.7	70.0	0.2	63.5	69.1	-5.7
Repeaters (%)	30.3	30.0	-0.2	36.5	30.9	5.7

Tax Revenue

TAIWAN (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P	YTD Sep. 2019	% change YTD
State tax revenue generated* (\$ Millions)	4.56	6.39	40.2%	NA	5.34	NA

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