

旅遊環境 Environment

全球旅遊市場 The Global Travel Market



全球觀光業概況 Overview of the Global Tourism Market

受新冠疫情影响，2020年第1季後全球實施旅遊限制令，使國際入境旅客銳減。2020年全球國際旅客人次（過夜遊客）計3.94億、負成長73%，其中亞太地區（-84.2%）跌幅最大，中東（-74%）地區次之，接著為非洲（-73.7%）、歐洲（-68.9%）、美洲（-68.8%）。

The number of international arrivals fell sharply after the first quarter of 2020 as countries enacted COVID-19 related border controls. In 2020, the number of global international tourist arrivals (overnight stays) fell 73% to 394 million, with the biggest declines in the Asia-Pacific region (-84.2%), followed by the Middle East (-74%), Africa (-73.7%), Europe (-68.9%), and the Americas (-68.8%).

國際觀光市場入境旅客統計 Statistics on International Tourism Markets for Inbound Visitors

區域 Region	年旅客（百萬人次） Visits (Millions)		同期成長率（%） YoY Increase (%)	
	2019	2020	2019	2020
全球 Global	1,466	402.0	3.8	-72.6
已開發經濟體 Developed economies	777.0	214.0	2.1	-72.5
新興經濟體 Emerging economies	689.0	188.0	5.7	-72.7
歐洲 Europe	746.3	235.9	4.2	-68.4
北歐 Northern Europe	83.7	21.5	3.3	-74.3
西歐 Western Europe	205.4	79.0	2.6	-61.5
中 / 東歐 Central / Eastern Europe	153.2	47.2	4.8	-69.2
南歐 / 地中海地區 Southern Europe / Mediterranean Region	304.0	88.2	5.3	-71.0
亞太地區 Asia-Pacific	360.4	59.3	4.0	-83.5
東北亞 Northeast Asia	170.3	20.2	0.7	-88.1
東南亞 Southeast Asia	138.6	25.5	7.8	-81.6
南太平洋地區 South Pacific	17.5	3.6	2.4	-79.4
南亞 South Asia	34.0	10.0	7.5	-70.5
美洲 The Americas	219.3	69.9	1.5	-68.1
北美 North America	146.6	46.7	3.1	-68.2
加勒比海地區 Caribbean	26.3	10.3	2.0	-60.7
中美 Central America	10.9	3.1	0.8	-71.6
南美 South America	35.4	9.7	-4.7	-72.6
非洲 Africa	70.1	18.1	2.0	-74.2
北非 North Africa	25.6	5.5	6.4	-78.4
次撒哈拉地區 Sub-Saharan region	44.5	12.5	-0.3	-71.1
中東 Middle East	70.0	18.9	6.8	-73.0

Source: Volume19 Issue 5, Updated September 2021, UNWTO World Tourism Barometer.

Covid-19 新冠肺炎疫情造成全球性產業經濟重大影響，各國實施邊境管制政策，全球入出境旅遊活動亦陷入停頓，我國觀光產業亦面臨國境封閉及產業存續轉型等挑戰。

COVID-19 has had a major impact on the global economy, bringing international travel to a standstill as countries implement border controls. Taiwan's tourism industry has also faced challenges due to border closures and ongoing industrial transformation.

亞洲觀光市場概況 Overview of Asian Tourism Markets

受新冠疫情影響，2020年亞洲各觀光市場入境旅客人次皆為負成長。

The number of inbound arrivals fell in all of Asia's tourism markets in 2020 due to COVID-19.

2020年亞洲各觀光市場入境旅客人次 Number of Inbound Visitors for Major Asian Tourism Markets in 2020

📍 入境 Arrivals
▲ 入境成長 Increasing arrivals
▼ 入境下降 Declining arrivals



資料來源：日本國際觀光振興機構、香港旅遊發展局、韓國觀光公社、新加坡旅遊局、馬來西亞觀光局
Source: Japan National Tourist Organization, Hong Kong Tourism Board, Korea Tourism Organization, Singapore Tourism Bureau, Malaysia Tourism Promotion Board

2020年亞洲觀光市場主要客源 Major Visitor Source Markets for Asia in 2020



資料來源：日本國際觀光振興機構、香港旅遊發展局、韓國觀光公社、新加坡旅遊局、馬來西亞觀光局
Source: Japan National Tourist Organization, Hong Kong Tourism Board, Korea Tourism Organization, Singapore Tourism Bureau, Malaysia Tourism Promotion Board

臺灣旅遊市場 Taiwan Travel Market

來臺旅遊市場 Inbound Travel Market

109年來臺旅客 137.7 萬人次，較 108 年減少 88.39%；國人出國 233 萬 5,564 人次，較 108 年減少 86.34%。

109 年全年來臺旅客，按旅客居住地分，以日本 26 萬 9,659 人次最多，占 19.57%；其次為韓國 17 萬 8,911 人次（占 12.98%）及港澳 17 萬 7,654 人次（占 12.89%）。依來臺目的分析，以「觀光」69 萬 4,187 人次最多，占 50.38%，其次為「其他」49 萬 212 人次，占 35.58%；來臺旅客中有 49.83% 為女性，年齡則以 20-29 歲者最多，占 25.70%，平均停留夜數為 8.29。

來臺旅客受疫情影響，各季分布較往年呈現斷裂不連續現象，第一季占 90.62%；而平均停留夜數第一季為 7.56 夜，90 夜以下人次占 85.65%；第二至四季為 35.85 夜，90 夜以下人次占 26.36%。

Taiwan received 1.377 million inbound tourists in 2020, a decrease of 88.39% from 2019. Taiwanese tourists made 2,235,564 outbound visits, 86.34% less than in 2019.

In 2020, Japan was the biggest source of inbound visitors to Taiwan, with 269,659 arrivals or 19.57% of the total. The next biggest source markets were South Korea (178,911 visitors, 12.98%) and Hong Kong & Macao with (177,654 visitors, 12.89%). Analyzed according to purpose of travel, "tourism" accounted for 694,187 visits (50.38% of the total), followed by "other" at 490,212 visits (35.58%). Women accounted for 49.83% of all visitors to Taiwan; 20-29 year olds accounted for 25.70% of the total; and the average stay was 8.29 nights.

Due to COVID-19, the distribution of visits by quarter bore no relation to previous years, with 90.62% of the total concentrated in the first quarter. In the first quarter, the average length of stay was 7.56 nights and stays under 90 nights accounted for 85.65% of the total. From the second to fourth quarters, the average length of stay was 35.85 nights, with stays under 90 nights accounting for 26.36% of the total.



109 年來臺旅遊市場重要指標統計表

Key Indicators of Taiwan's Inbound Tourism Market in 2020

指標 Items	109 年 2020		108 年 2019		109 年與 108 年比較 2020 versus 2019
來臺旅客人次 Number of visitor arrivals to Taiwan	138 萬人次 1,377,861 visitors		1,186 萬人次 11,864,105 visitors		▼ 88.39%
來臺旅客平均停留夜數 Average length of stay of visitors to Taiwan	8.29 夜 8.29 / nights		6.20 夜 8.70 / nights		▲ 2.09 夜 / nights
來臺旅客觀光支出 (不含國際機票費) Annual Amount of Inbound Tourism Expenditure (ex-cluding international flight tickets)	新臺幣 539 億元 NT\$53.9billion	18.00 億美元 US\$1.8billion	新臺幣 4,456 億元 NT\$445.6billion	144.11 億美元 US\$14.411billion	▼ 87.51% 新臺幣減少 87.90% ▼ NTD \$87.90%

註：「來臺旅客人次」、「來臺旅客平均停留夜數」之資料來源為內政部移民署。

Note: "Number of inbound visitors to Taiwan" and "average length of stay (nights) of visitors to Taiwan" data from the National Immigration Agency, Ministry of the Interior.

國人國內旅遊 Domestic Travel

109 年國人國內旅遊重要指標統計表

Major Indices of Domestic Travel in 2020

項目 Items	109 年 2020		108 年 2019		109 年與 108 年比較 2020 versus 2019
國人國內旅遊比率 Domestic travel rate	88.4%		91.1%		▼ 2.7 個百分點 (pp) Down 2.7 percentage points
平均每人旅遊次數 Average number of trips per person	6.74 次 6.74 trips		7.99 次 7.99 trips		▼ 1.25 次/trips
國人國內旅遊總旅次 Total number of domestic travels by citizens	142,970,000 旅次 142,970,000 trips		169,279,000 旅次 169,279,000 trips		▼ 15.54%
平均旅遊天數 Average number of days per travel	1.54 天 1.54 days		1.51 天 1.51 days		增加 0.03 天 0.03 days increase
假日旅遊比率 Travels taken during holidays and weekends	65.6%		66.9%		▼ 1.3 個百分點 (pp) 1.3 percentage points
旅遊整體滿意度 Overall satisfaction level	98.7%		98.4%		▲ 0.3 個百分點 (pp) ※ 0.3 percentage points
每人每次平均旅遊支出 Average expenditure per person per travel	新臺幣 2,433 元 NT\$2,433	82.26 美元 US\$82.26	新臺幣 2,320 元 NT\$2,320	75.02 美元 US\$75.02	▲ 4.87% (NT\$) ▲ 9.65% (US\$)
國人國內旅遊總支出 Total expenditure on domestic travel	新臺幣 3,478 億元 NT\$347.8 billion	117.59 億美元 US\$117.59billion	新臺幣 3,927 億元 NT\$392.7 billion	126.98 億美元 US\$126.98billion	▼ 11.43% (NT\$) ▼ 7.39% (US\$)

註：· 本調查對象為年滿 12 歲以上國民。
· (*) 符號表示在 5% 顯著水準下，經 t 檢定後無顯著差異。
· 國內旅遊比率係指國民在全年至少曾在國內旅遊 1 次者的占比。

The survey was conducted on citizens aged 12 and above.
· (*) symbol indicates that the significance level was under 5% and shown by t-test to not
· The ratio of citizens who took domestic tourism trips refers to the percentage of the whole population who took at least one domestic tourism trip during the whole year.

主要觀光遊憩據點遊客到訪概況 Visitor Trends at Major Tourism Attractions

109 年計有 316 處納入主要觀光遊憩據點，較 108 年新增 8 處、刪除 18 處。僅直轄市及縣(市)級風景特定區及森林遊樂區有六成據點遊客人次較 108 年增加；餘受新冠肺炎疫情影響，遊客人次無明顯成長。

將 109 年新增刪除之據點排除，共計與 108 年有 308 處相同據點，在 308 個據點中，203 個據點遊客減少(占 65.9%)；104 個據點遊客人次增加(占 33.8%)，僅 1 處據點遊客持平。顯示 2/3 的遊憩據點旅客呈現下滑趨勢。

109 年與 108 年各類別比較，其中觀光地區類型呈現正成長 8.84%，主因係於 109 年 7 月及 8 月推出安心旅遊補助，高中以下國民能免費入園，使麗寶樂園 7 月及 8 月遊客人次有顯著增長，較 108 年成長 81.5%；另森林遊樂區類型 109 年較 108 年成長 4.51%，推測可能與林務局推出自 109 年 7 月 15 日起至 109 年年底，實施國人與持有居留證的外籍人士可於 12 處國家森林遊樂區任選 1 處免費入園 1 次之措施有關。另因疫情影響，國人喜好前往人潮較不擁擠的山域，且觀光局積極推動 2020 脊梁山脈旅遊年，推出各項行銷活動，使得森林遊樂區類型遊客人次成長。



▲ 4.51%

森林遊樂區 109 年成長 4.51%
Visitor numbers increase by 4.51% at forest recreation areas in 2020

109 年 1 月至 12 月主要觀光遊憩據點遊客人次統計類型趨勢表

Visitor Trends at Major Tourism and Recreation Attractions in Taiwan in 2020

類型 Type	總據點數(個) Total base	與上年 1 月 - 12 月相比 YoY (Jan-Dec)			
		遊客人次增加之據點 Sites with More Visits		遊客人次減少之據點 Sites with Fewer Visits	
		數目(個) Total base	占比 %	數目(個) Total base	占比 %
國家公園 National Parks	39	10	25.64	29	74.36
國家風景區 National Scenic Areas	60	27	45.00	33	55.0
直轄市及縣(市)級風景特定區 Designated scenic areas at the municipal or county (city) level	17	11	64.71	6	35.29
森林遊樂區 Forest Recreation Areas	19	13	68.42	6	31.58
休閒農業區及休閒農場 Recreational Agriculture Areas and Recreational Farms	6	1	16.67	5	83.33
觀光地區 Tourist Areas	8	1	12.50	7	87.50
博物館 Museums	39	4	10.26	35	89.74
宗教場所 Religious Sites	10	2	20.00	8	80.00
其他 Other	110	35	31.82	74	67.27
總計 Total	308	104	33.8	203	65.9

備註：由於各年度遊憩據點皆有增刪，109 年度新增據點將不列入與 108 年度比較。

Note: Due to the addition and removal of tourism and recreation attractions, no comparison to 2019 is provided for attractions added in 2020

As of the end of 2020, Taiwan had 316 major tourism and recreation attractions. This included the addition of eight new attractions and elimination of 18 over the course of the year. Only 60% of attractions experienced an increase in visitors over 2019, and any such increases were minimal due to the impact of the pandemic.

Among the 308 attractions not added or eliminated in 2020, visitor numbers fell at 203 (65.9%), increased at 104 (33.8%), and remained the same at one compared to 2019, indicating a downward trend in visitor numbers at two-thirds of the sites.

Analyzed by attraction type, visitor numbers increased by 8.84% at tourist areas between 2019 and 2020, mainly due to the launch of the Safe Travel subsidy program in July and August of 2020. Free admission to amusement parks for citizens up to high school age drove an 81.5% year-over-year (YoY) increase in visitors to Lihpao Land during the two months of the program. Visitor numbers at forest recreation areas increased by 4.51% YoY in 2020. The gain was attributed to the launch of a Forest Bureau program giving citizens and foreign nationals with residence permits one free admission to any of the 12 national forest recreation areas between July 15 to December 31, 2020. Furthermore, due to COVID-19, locals preferred to visit less-crowded mountain areas. The Tourism Bureau actively launched marketing campaigns under the 2020 Year of Mountain Range Tourism program to increase visitor numbers at forest recreation areas.

國人出國觀光市場 Taiwan's Outbound Travel Market

109 年國人出國共計 233 萬 5,564 人次。依出國目的地分析，以前往亞洲地區為最多，計 203 萬 8,522 人次（占 87.28%），其次為美洲地區 17 萬 5,736 人次（占 7.52%）、歐洲地區 5 萬 9,773 人次（占 2.56%）、大洋洲地區 5 萬 2,488 人次（占 2.25%）。

依國家（地區）別分析，赴日本 69 萬 7,981 人次為最多，其次依序為中國大陸 41 萬 4,634 人次、韓國 16 萬 3,953 人次、越南 15 萬 8,286 人次、香港 15 萬 8,008 人次。

觀光整體收入 Tourism Revenue

係來臺旅客觀光支出及國人國內旅遊支出總和，109 年計約為 136 億美元，占當年 GDP 百分比為 2.03%

• 來臺旅客觀光支出

依據觀光局 109 年辦理之「109 年來臺旅客消費及動向調查」，109 年受新冠肺炎疫情影響，來臺旅客觀光支出約為 18 億美元，較 108 年減少 87.51%。

• 國人國內旅遊支出

依據觀光局辦理之「109 年臺灣旅遊狀況調查報告」，109 年 12 歲以上國人國內旅遊約為 1.43 億旅次，每人每次旅遊平均支出約為 82 美元，平均旅遊天數約為 1.54 天，推估國人國內旅遊總支出約為 118 億美元，較 108 年減少 7.39%。

In 2020, Taiwanese citizens made 2,335,564 trips abroad. Asia was the main destination, accounting for 2,038,522 trips, or 87.28% of the total, followed by the Americas with 175,736 trips (7.52%), Europe with 59,773 trips (2.56%), and Oceania with 52,488 trips (2.25%).

Japan was the first destination of choice, attracting 697,981 Taiwanese visitors, followed by mainland China (414,634 trips), South Korea (163,953), Vietnam (158,286), and Hong Kong (158,008).

Tourism spending in Taiwan by inbound visitors and locals totaled an estimated US\$13.6 billion in 2020, accounting for 2.03% of GDP that year.

• Inbound Tourism Expenditure

According to the Tourism Bureau's 2020 Survey of Taiwanese Tourist Consumption and Trends, spending by inbound tourists in Taiwan totaled US\$1.8 billion in 2020, down 87.51% from 2019 due to COVID-19.

• Domestic Tourism Expenditure

According to the Tourism Bureau's 2020 Survey Report on Tourism in Taiwan, citizens aged 12 and above made approximately 143 million domestic trips in 2020 and spent an average of US\$82 per person per visit. The average length of such visits was 1.54 days. Based on these numbers, it is estimated that domestic tourism expenditures totaled about US\$11.8 billion in 2020, down 7.39% from 2019.

觀光市場調查及研究分析 Tourism Market Surveys and Analysis

• 觀光市場調查

為瞭解國內外觀光旅遊市場動態，交通部觀光局每年廣續辦理「來臺旅客消費及動向調查」及「臺灣旅遊狀況調查」；調查所得資料，用以推估來臺旅客觀光支出、國人國內旅遊總次數、國人國內旅遊總支出及國人出國旅遊總支出，除提供中央銀行編製國際收支表，另配合聯合國國際觀光組織編製全國觀光年報之重要觀光統計數據，亦為世界經濟論壇評核全球觀光競爭力報告之重要參據，同時也是做為相關機關規劃並提升旅遊服務品質以及產、官、學各界發展觀光之參考依據。

• 觀光衛星帳（經濟指標）

為瞭解觀光活動之重要性及對經濟之貢獻，交通部觀光局依據世界觀光組織（UNWTO）建議之架構，編撰 107-108 年臺灣地區觀光衛星帳（Tourism Satellite Account），據以瞭解觀光支出及產業關聯效果，並提供產、官、學各界發展觀光之參考依據。

臺灣觀光衛星帳參酌 TSA2008，將臺灣觀光衛星帳的帳表調整為：入境觀光支出表（產品別）、國內觀光支出表（產品別、旅遊型態別）、內部觀光支出表（產品別）、觀光產業及其他產業生產帳（生產者價格）、觀光產品之觀光比重表、觀光產業之觀光比重表、觀光直接附加價值（TDGVA）表、觀光產業就業表，以及觀光指標表，調整後的臺灣觀光衛星帳稱為 TTSA2016。

根據 TTSA2016，在觀光供給面方面，108 年及 107 年之觀光附加價值分別為 4,664 億元及 4,313 億元，占全國 GDP 比重分別為 2.47% 及 2.34%；108 年及 107 年之觀光產業就業人數分別為 44.6 萬人及 41.4 萬人。108 年及 107 年之觀光支出總金額分別為 1 兆 1,664 億元及 1 兆 1,113 億元，其中 108 年及 107 年國人出國觀光支出分別為 1,875 億元及 1,812 億元、國人國內觀光支出分別為 4,450 億元及 4,316 億元、入境旅客觀光支出分別為 5,339 億元及 4,985 億元。

• Tourism Market Surveys

To understand domestic and foreign tourism market dynamics, the Tourism Bureau conducts an annual Survey of Visitor Expenditure and Trends in Taiwan and Survey of Taiwan Tourism. Data obtained by the survey is used to estimate inbound tourism expenditures, total number of domestic trips, total domestic tourism expenditure by locals, and total expenditures on outbound travel. It is also used by Central Bank to compile Taiwan's balance of payment data and by the United Nations World Tourism Organization (UNWTO) to compile important tourism statistics in its annual national tourism reports. The data provides an important reference for the World Economic Forum's reports on global tourism competitiveness. It also serves as a reference for planning by relevant agencies, improvement of the quality of tourism services, and development of tourism in the industry, government, and academic sectors.

• Tourism Satellite Accounts (The Economic Impact)

To understand the importance of tourism and its contribution to the economy, the Tourism Bureau compiled the 2018-2019 Taiwan Tourism Satellite Account (TTSA) according to the framework recommended by the UNWTO. The TTSA provides insight into tourism spending and its effect on related industries. It also serves as a reference for the development of tourism in the industry, government, and academic sectors.

The Tourism Bureau annually calculates a "Taiwan Tourism Satellite Account" (TTSA), the last version of which was created in 2016, and is referred to as "TTSA2016." The TTSA was developed along the framework provided by an international framework issued in 2008 called TSA2008." TSA's provide for a more accurate, standardized and inclusive measurement of the contribution of tourism to an economy. This contribution is referred to as the tourism direct gross value added (TDGVA).

According to the TTSA2016, TDGVA amounted to NT\$466.4 billion in 2019 and NT\$431.3 billion in 2018, equal to 2.47% and 2.34% of GDP, respectively. During the same years, the tourism industry employed 446,000 people and 414,000 people and generated tourism-related spending totaling NT\$1.664 trillion and NT\$1.113 trillion, respectively. Taiwan nationals spent NT\$187.5 billion in 2019 and NT\$181.2 billion in 2018 on outbound tourism and NT\$445.0 billion and NT\$431.6 billion on domestic tourism. Inbound visitors spent NT\$533.9 billion and NT\$498.5 billion on tourism in Taiwan, respectively.



109 年臺灣觀光整體收入約

136 億美元

Taiwan's Tourism Revenue was an estimated US\$13.6 billion in 2020

