

局長序

Foreword

應變、轉變、再蛻變
困境中看見機會
攜手再創觀光產業新價值

Adapt, Change, and Evolve
Seeing opportunity in adversity to
create new value in the tourism industry

新冠肺炎疫情肆虐全球超過一年，突如其來的疫情，讓全球觀光市場瞬間進入冰河期，109年受世界各國旅遊限制令及需求暴跌影響，預估全球國際旅客減少逾10億人次、旅遊收入損失超過9,300億美金，而亞太地區是受疫情影響最早及最嚴重地區，國際入境旅客較108年減少超過3億人次。我國受國際疫情影響，109年來臺旅客共計137萬7,861人次，較108年負成長88.39%。

面對全球疫情不確定的發展，觀光局配合中央流行疫情指揮中心防疫措施，在疫情爆發之初即成立應變小組，訂定相關因應措施及應變機制，感謝觀光產業在嚴峻的疫情下，配合政府政策，共同參與防疫工作，在疫情期間暫停組團赴國外旅遊及接待來臺觀光團體入境、因應居家檢疫者或隔離者之人數遽增，配合設置防疫旅館，以及進行主要景區、夜市等公共場域人流管制相關措施，全力配合疫情防堵，維護國內防疫安全及國人健康。期間觀光局全體同仁也全心全力投入紓困工作，讓產業迅速獲得資金挹注，同時透過落實各項防疫工作，維持局務持續正常運作。



The outbreak of the global COVID-19 pandemic over a year ago plunged the international tourism market into a virtual ice age. Global tourism demand plummeted in 2020 as nations enacted travel restrictions. The number of international tourism trips fell by an estimated one billion-plus globally, pulling down tourism revenue by more than US\$930 billion. In the Asia-Pacific region, which was hit first and hardest by the pandemic, the number of international inbound tourists fell by more than 300 million from 2019. The pandemic reduced the number of inbound tourist visits to Taiwan to 1,377,861 in 2020, down by 88.9% from 2019.

Facing the uncertain development of the pandemic, the Tourism Bureau established a COVID-19 response team. It also formulated related response measures and contingency mechanisms early in the outbreak in coordination with Central Epidemic Command Center prevention measures. We are thankful that the tourism industry cooperated with government policies and prevention measures. During the pandemic, the industry suspended outbound and inbound group tours. It made hotel facilities available to meet surging demand for quarantine space. It also carried out crowd control measures at major scenic spots, night markets and other public areas. Through its full cooperation with pandemic prevention measures, the tourism industry helped to control the outbreak and protect public health. The devotion of all of my colleagues at the Tourism Bureau to relief work was also vital to the industry's ability to quickly access financial support. Our team also implemented COVID prevention measures to ensure that our Bureau's normal operations were not interrupted.

回顧109年，新冠肺炎對觀光產業造成前所未有的衝擊，對於觀光產業而言，可說是營運非常艱辛的一年，觀光局始終與業界站在一起，做業界堅強的後盾，除推動薪資及營運補貼等各項紓困方案來減少產業經營壓力，我們也陸續推動「防疫踩線旅遊」、「安心旅遊」及「疫後觀光整備」三階段的旅遊方案，由國內旅遊展開振興復甦，穩定有序提振國旅市場，帶動國人1,846萬人次出遊，創造直接間接觀光效益達654億元，有效推升「食、宿、遊、購、行」國民旅遊內需市場動能。除穩住產業經營的元氣，藉由辦理跨專業種子人員培訓，加速建立產業數位化思維，奠基產業數位轉型基礎，以強化疫後產業數位轉型營銷能力，並輔導業者轉型經營國民旅遊，創新旅遊產品，業者也推出全球第一艘復航的國際郵輪之「跳島遊程」，帶動跳島旅遊新熱潮，讓臺灣觀光產業順勢轉型，創造觀光產業新價值，期與觀光產業合力走出疫情陰霾，展現臺灣觀光產業堅毅的韌性與發展潛力。總計109年旅行社總公司家數仍較108年增加49家，旅宿業增加546家，整體房間數增加4,426間。

經濟合作暨發展組織（OECD）形容COVID-19是一生一次的機會，讓觀光產業發展出更永續且具韌性的商業模式。疫情總有結束的一天，為打造更有競爭力的觀光產業，將持續依行政院核定之「Taiwan Tourism 2030 臺灣觀光政策白皮書」為指導方針，並依「Tourism 2025- 臺灣觀光邁向2025方案」落實執行，並因應疫情發展調整策略布局為「前期（2021-2022年）提振國旅、後期（2023-2025年）布局衝刺國際」。讓我們一起攜手轉變，共度難關，疫情期間把基本功做好，等到疫情解封後，立即投入國際市場，加速產業復甦，就有絕佳的機會從疫情海嘯第一排轉為絕美海景第一排。

本年報的出刊，希望能將109年我們攜手觀光產業面對疫情共同拼搏的點滴匯集，展現臺灣觀光產業的韌性及創新能量，做為展望未來的墊腳石，化為未來觀光推展新動能。

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In 2020, COVID-19 struck the tourism industry with an unprecedented shock. It was truly a very difficult year. The Tourism Bureau has always been a firm and strong supporter of the tourism industry. In addition to promoting salary and operating subsidies and other relief programs to reduce the operational pressure on the industry, we continued to promote a three-stage tourism plan of "anti-epidemic travel," "safe travel," and "post-pandemic tourism readiness." Measures taken to revitalize domestic tourism and boost the international travel market in a stable and orderly manner spurred 18.46 million people to travel and created direct and indirect tourism benefits of NT\$65.4 billion. This added momentum to domestic tourism demand in the food, lodging, travel, shopping, and transportation sectors. In addition to stabilizing industry operations, the Bureau laid a foundation for digitally transforming the tourism sector by arranging cross-professional seed training and accelerating the establishment of digital thinking in the industry to strengthen marketing of the industry's post-pandemic digital transformation. It also provided guidance to the industry in transforming and developing domestic tourism operations and innovating new travel products. Taiwan led the world in resuming international cruise trips with the launch of the "Island Hopping Tour," driving a new wave of island-hopping tourism and helped the tourism industry to transform and create new value. We hope to join forces with the industry to weather the pandemic and show the resilience and development potential of Taiwan's tourism sector. In 2020, the number of travel agency head offices increased by 49, the number of hotels by 546, and the number of rooms by 4,426 compared to 2019.

The Organization for Economic Co-operation and Development (OECD) has described COVID-19 as a once-in-a-lifetime opportunity for the tourism industry to develop a more sustainable and resilient business model. The pandemic will eventually end. To create a more competitive tourism industry, we will continue to be guided by the Executive Yuan's "Taiwan Tourism 2030: Taiwan Tourism Policy White Paper" and move forward in accordance with the Taiwan Tourism 2025 campaign. We will also adjust our strategic layout in response to pandemic developments as "domestic tourism stimulus in the early phase (2021-2022) and international tourism development in the later phase (2023-2025)." I hope we can all work together to transform and weather this difficult time, honing basic skills during the pandemic and, once COVID has passed, promptly tapping international markets and accelerating the industry's recovery. We have an excellent opportunity to move from the front lines of the pandemic to the front row of a beautiful outlook ahead.

With the publication of this annual report, we hope to compose a picture of the joint efforts of the Tourism Bureau and tourism industry in the face of the pandemic in 2020. The report presents the resilience and innovation of Taiwan's tourism industry as a stepping stone to future prospects and the transformation of this challenging time into new momentum for future tourism promotion.