



# 旅遊市場 Travel Market

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 implemented border controls. Taiwan's tourism industry has also faced challenges due to border closures and ongoing industrial transformation.

## 臺灣旅遊市場 Taiwan Travel Market



### 110 年國人國內旅遊重要指標統計表 Major Indices of Domestic Travel in 2021

項目 Items	110 年 2021		109 年 2020		110 年與 109 年比較 2021 versus 2020	
國人國內旅遊比率 Domestic travel rate	83.8%		88.4%		▼ 4.6 個百分點 (pp) Down 4.6 percentage points	
平均每人旅遊次數 Average number of trips per person	5.96 次 5.96 trips		6.74 次 6.74 trips		▼ 0.78 次/trips	
國人國內旅遊總旅次 Total number of domestic travels by citizens	126,027,000 旅次 126,027,000 trips		142,970,000 旅次 142,970,000 trips		▼ 11.85%	
平均旅遊天數 Average number of days per travel	1.45 天 1.45 days		1.54 天 1.54 days		▼ 0.09 天 Down 0.09 days	
假日旅遊比率 Travel taken during holidays and weekends	69.2%		65.6%		▲ 3.6 個百分點 Up 3.6 percentage points	
旅遊整體滿意度 Overall satisfaction level	99.1%		98.7%		▲ 0.4 個百分點 (※) Up 0.4 percentage points	
每人每次平均旅遊支出 Average expenditure per person per travel	新臺幣 2,061 元 NT\$2,061	73.55 美元 US\$73.55	新臺幣 2,433 元 NT\$2,433	82.26 美元 US\$82.26	NTS ▼ 15.29%	US\$ ▼ 10.59%
國人國內旅遊總支出 Total expenditure on domestic travel	新臺幣 2,597 億元 NT\$259.7 billion	92.67 億美元 US\$9.267 billion	新臺幣 3,478 億元 NT\$347.8 billion	117.59 億美元 US\$11.759 billion	NTS ▼ 25.33%	US\$ ▼ 21.19%

註：• 本表調查對象為年滿 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全年至少曾在國內旅遊 1 次者的占比。

• Data for this table was compiled from a survey of Taiwan nationals aged 12 and over.  
• The (※) symbol indicates that the significance level was under 5% and shown by t-test to not be a significant difference.  
• The domestic tourism ratio refers to the ratio of Taiwan nationals who made at least one domestic trip during the year.



## 主要觀光遊憩據點遊客到訪概況

Visitor Trends at Major Tourism Attractions

為比較主要觀光遊憩據點統計各類型遊憩據點 (109 年計有 316 處, 110 年計有 323 處) 遊客人次消長, 爰將 110 年新增刪除之據點排除, 共計有 313 處相同據點。110 年較 109 年遊客人次消長, 據點正成長 30 處、283 處負成長。

109 年及 110 年主要觀光遊憩據點人次皆受新冠疫情影響呈現下降趨勢, 綜觀各類型主要觀光遊憩據點發現 110 年較 109 年各類型據點人次皆為負成長, 下滑趨勢約在 15%~39% 之間。

110 年各月與 109 年同期比較, 2 月份遇春節假期與 109 年遊客人數差異不大, 同年 3、4 月因疫情趨緩遊客人次皆高於 109 年同期人次, 惟自 5 月 19 日至 7 月 26 日疫情又起全國第三級警戒, 後續雖有 5 倍券及國旅券振興等相關措施, 各觀光據點遊客人次仍未恢復至 109 年同期水平, 全年遊憩據點遊客人次較 109 年衰退。

13 個國家級風景特定區共計 70 個據點, 其中正成長共計 4 處, 負成長共計 66 處。13 個國家風景區 110 年僅大鵬灣國家風景區呈現正成長 (44.03%), 主要係因小琉球遊憩區因其統計方法調整, 正成長 148.78%。其中衰退高於五成者為澎湖國家風景區 -56.26%、馬祖國家風景區 -56.44%、東北角暨宜蘭海岸國家風景區 -50.07%, 皆因疫情、交通航班減班、活動延期等影響所致。

To compare statistics for principal scenic spots and changes in visitor numbers at various types of scenic sites (316 sites in 2020 and 323 sites in 2021), sites added or deleted in 2021 were excluded, resulting in 313 sites that are the same in both years. In 2021, the number of visitors increased at 30 sites and fell at 283 sites compared to 2020.

In 2020 and 2021, the number of visitors to principal scenic sites trended down due to COVID, with visitor numbers at all types of destinations falling between 15% to 39% in 2021 relative to the year before.

Comparing 2021 and 2020 by month, Lunar New Year holiday travel in February 2021 was not substantially different from the same period in 2020. In March and April 2021, COVID slowed visitor numbers more relative to the same period in 2020. From May 19 to July 26, Taiwan upgraded to a Level 3 alert due to a resurgence of COVID. Despite a fivefold increase in the issuance of coupons, domestic travel vouchers, and other revitalization measures, the number of visitors to various scenic spots failed to recover to the year earlier level. The total number of visitors to scenic spots also fell for the entire year compared to 2020.

Among 70 scenic spots at Taiwan's 13 national scenic areas, visitor numbers grew at four sites and fell at 66 sites. Dapeng Bay National Scenic Area was the only one of the 13 national scenic area to post positive growth (44.03%) in 2021, due mainly to a 148.78% increase at the Xiaoliuqiu Recreation Area resulting from adjustments to statistical methods. Scenic areas with more than 50% declines included Penghu National Scenic Area (-56.26%), Matsu National Scenic Area (-56.44%), and Northeast and Yilan Coast National Scenic Area (-50.07%), all due to COVID-related reductions in bus and flight service and event delays.

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	5	12.82	34	87.18
國家風景區 National Scenic Areas	70	4	5.63	66	94.37
直轄市及縣(市)級風景 特定區 Designated scenic areas at the municipal or county (city) level	17	2	11.76	15	88.24
森林遊樂區 Forest Recreation Areas	19	0	-	19	100.00
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	5	12.82	34	87.18
宗教場所 Religious Sites	10	0	-	10	100.00
其他 Other	105	12	11.43	93	88.57
總計 Total	313	30	9.55	283	90.45

備註: 由於各年度遊憩據點皆有增刪, 110 年度新增據點將不列入與 109 年度比較。  
Note: Due to the addition and removal of tourism and recreation attractions, no comparison to 2020 is provided for attractions added in 2021

### 110年

3、4 月因疫情趨緩, 遊客人次皆高於 109 年同期人次。

The COVID-induced slowing of visitor numbers in March and April 2021 was greater than that in the year-earlier period.



## 來臺旅遊市場 Inbound Travel Market

110年來臺旅客 14 萬 479 人次，較 109 年減少 89.80%；國人出國 35 萬 9,977 人次，較 109 年減少 84.59%。

110 年全年來臺旅客，按旅客居住地分，以越南 2 萬 4,935 人次最多，占 17.75%；其次為印尼 1 萬 3,819 人次（占 9.84%）及中國大陸 1 萬 3,267 人次（占 9.44%）。依來臺目的分析，以「其他」11 萬 3,261 人次最多，占 80.62%，其次為「業務」1 萬 1,937 人次，占 8.50%；來臺旅客中有 34.62% 為女性，年齡則以 20-29 歲者最多，占 31.62%。

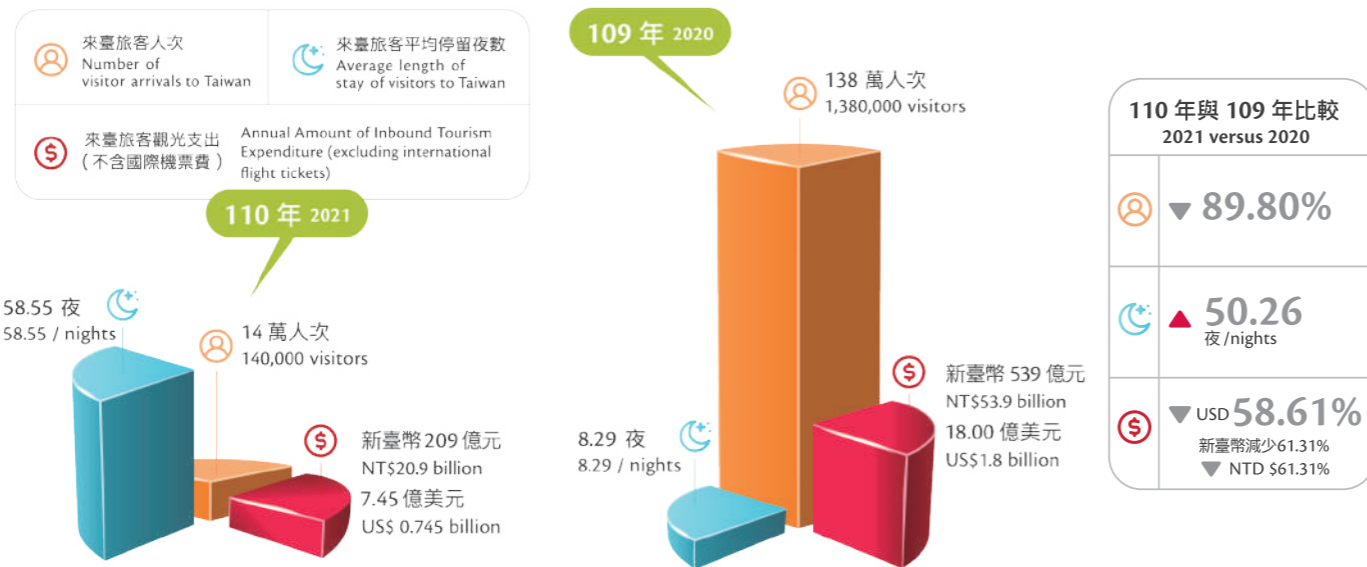


In 2021, Taiwan received 140,479 inbound visitors, down 89.80% from 2021. The number of outbound travelers from Taiwan during the same period fell 84.59% to 359,977.

In 2021, Vietnam was the biggest source of inbound visitors to Taiwan, with 24,935 arrivals or 17.75% of the total. The next biggest source markets were Indonesia (13,819 visitors, 9.84%) and mainland China (13,267 visitors, 9.44%). Analyzed by travel purpose, "other" led with 113,261 visits (80.62% of the total), followed by "business" (11,937 visits, 8.50%). Among inbound visitors, females accounted for 34.62% of the total and 20-29 year olds were the largest age group (31.62%).

### 110 年來臺旅遊市場重要指標

Key Indicators of Taiwan's Inbound Travel Market in 2021



註：1.「來臺旅客人次」資料來源為內政部移民署。

2. 110年「來臺旅客平均停留夜數」係由調查樣本計算而得，是以停留夜數1至120夜為計算基礎(因應防疫措施，入境需居家隔離14天及自主健康管理7天)；109與108年「來臺旅客平均停留夜數」資料來源為內政部移民署，是以停留夜數1至90夜為計算基礎。

Note: 1. "Number of inbound visitors to Taiwan" data from the National Immigration Agency, Ministry of the Interior.

2. The "average length of stay (nights) for all inbound visitors to Taiwan" in 2021 was calculated from a survey sample and based on lengths of stay (nights) from one to 120 nights (due to COVID restrictions, visitors were required to quarantine for 14 days after arrival and self-manage their health for 7 days).

In 2020 and 2019, the "average length of stay (nights) for all inbound visitors to Taiwan" was calculated by the National Immigration Agency based on stays (nights) of between one and 90 days.

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

110 年國人出國共計 35 萬 9,977 人次。依出國目的地分析，以前往亞洲地區為最多，計 23 萬 2,736 人次（占 64.65%），其次為美洲地區 11 萬 4,339 人次（占 31.76%）、歐洲地區 7,139 人次（占 1.98%）、大洋洲地區 4,833 人次（占 1.34%）。

依國家（地區）別分析，赴中國大陸 12 萬 8,637 人次為最多，其次依序為美國 10 萬 3,895 人次、日本 1 萬 4,049 人次、馬來西亞 1 萬 3,656 人次、香港 1 萬 2,692 人次。



In 2021, Taiwanese citizens made 359,977 trips abroad. Asia was the main destination, accounting for 232,736 trips, or 64.65% of the total, followed by the Americas with 114,339 trips (31.76%), Europe with 7,139 trips (1.98%), and Oceania with 4,833 trips (1.34%).

Analyzed by country (region), mainland China was the first destination of choice, attracting 128,637 Taiwanese visitors, followed by the US (103,895), Japan (14,049), Malaysia (13,656), and Hong Kong (12,692).

## 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，110 年計約為 100.12 億美元，占當年 GDP 百分比為 1.29%。



Combined tourism spending in Taiwan by inbound visitors and locals was an estimated US\$10.012 billion in 2021, accounting for 1.29% of GDP that year.

## 來臺旅客觀光支出 Inbound Tourism Expenditure

依據觀光局 110 年辦理之「110 年來臺旅客消費及動向調查」，110 年受新冠肺炎疫情影響，來臺旅客觀光支出約為 7.45 億美元，較 109 年減少 58.61%。

According to the Tourism Bureau's 2021 Survey of Taiwanese Tourist Consumption and Trends, spending by inbound tourists in Taiwan totaled US\$745 million in 2021, down 58.61% from 2020 due to COVID-19.

## 國人國內旅遊支出 Domestic Tourism Expenditure

依據觀光局辦理之「110 年臺灣旅遊狀況調查報告」，110 年 12 歲以上國人國內旅遊約為 1.26 億旅次，每人每次旅遊平均支出約為 73.55 美元，平均旅遊天數約為 1.45 天，推估國人國內旅遊總支出約為 92.67 億美元，較 109 年減少 21.19%。

According to the Tourism Bureau's 2021 Survey Report on Tourism in Taiwan, citizens aged 12 and above made approximately 126 million domestic trips in 2021 and spent an average of US\$73.55 per person per visit. The average length of such visits was 1.45 days. Based on these numbers, it is estimated that domestic tourism expenditures totaled about US\$92.67 billion in 2021, down 21.19% from 2020.

## 全球旅遊市場 The Global Travel Market

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

觀光旅遊業 GDP 在 2020 年相較疫情前下降 49.1% 並損失近 4.5 兆美元，2021 年相較 2020 年上升 30.7%，2022 年則預估將上升 31.7%。美洲引領復甦，2021 年觀光旅遊業 GDP 較 2020 年上升 36.8%，其次為亞太地區，觀光旅遊業 GDP 上升 36.3%。非洲（27.7%）、中東（27.1%）和歐洲（23.9%）緊跟其後（WTTC）。

2021 年國際旅客數增長 4%、2021 年入境旅客較疫情前（2019 年）下降 72%，2021 年觀光旅遊業的經濟貢獻（以觀光旅遊業國內生產總額衡量）估計約為 1.9 兆美元，高於 2020 年的 1.6 兆美元，但仍遠低於 2019 年疫情前的 3.5 兆美元（UNWTO）。

2021 年全球旅遊總人次（含國內旅遊人次和國際旅遊人次，下同）和全球旅遊總收入（含國內旅遊收入和國際旅遊收入，下同）恢復至疫情前的不足 60%。具體而言，2021 年全球旅遊總人次達到 66.0 億人次，全球旅遊總收入達到 3.3 兆美元，分別恢復至 2019 年的 53.7% 和 55.9%(WTTC)。



The contribution of tourism and travel to gross domestic product (GDP) in 2020 fell by 49.1%, or nearly US\$4.5 trillion, compared with the pre-COVID level. In 2021, revenue in the sector rose by 30.7%, with an additional 31.7% gain forecast in 2022. The Americas led the recovery, with revenue rising by 36.8% in 2021 compared to 2020, followed closely by the Asia-Pacific region (up 36.3%), Africa (27.7%), the Middle East (27.1%), and Europe (23.9%) (WTTC).

In 2021, the number of international travelers increased by 4%, but remained 72% below the pre-COVID level of inbound travelers (2019). The economic contribution of the tourism and travel industry in 2021 (contribution to GDP) was estimated at about US\$1.9 trillion, higher than the US\$1.6 trillion in 2020, but still below the US\$3.5 trillion level in 2019 before COVID (UNWTO).

Global traveler volume and revenue (including domestic and international travel) in 2021 recovered to less than 60% of the pre-COVID levels at 6.60 billion trips (53.7% of the 2019 level) and US\$3.3 trillion (55.9%), respectively (WTTC).



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

受新冠疫情影响，2021年亞洲各觀光市場入境旅客人次皆為負成長。

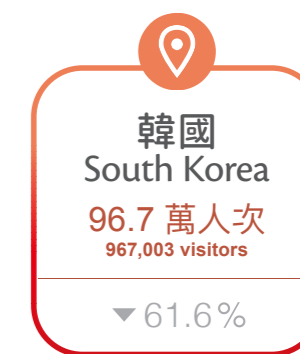
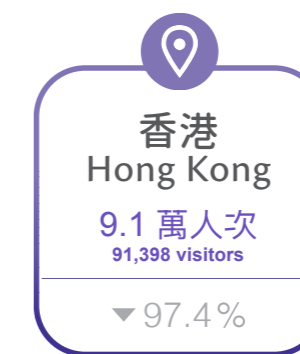
The number of inbound arrivals fell in all of Asia's tourism markets in 2021 due to COVID-19.

區域 Region	年旅客 (百萬人次) Visits (Millions)		同期成長率 (%) YoY Increase (%)	
	2020	2021	2020	2021
全球 Global	400	415	-72.7	3.8
已開發經濟體 Developed economies	215	218	-72.3	1.2
新興經濟體 Emerging economies	185	197	-73.1	6.8
歐洲 Europe	235.7	279.8	-68.4	18.7
北歐 Northern Europe	21.7	15.1	-74.0	-30.3
西歐 Western Europe	79.8	71.7	-61.1	-10.2
中 / 東歐 Central / Eastern Europe	46.0	54.5	-70.0	18.4
南歐 / 地中海地區 Southern Europe / Mediterranean Region	88.2	138.5	-71.0	57.1
亞太地區 Asia-Pacific	59.4	20.9	-83.5	-64.8
東北亞 Northeast Asia	20.3	11.3	-88.1	-44.3
東南亞 Southeast Asia	25.4	3.3	-81.7	-87.0
南太平洋地區 South Pacific	3.7	0.7	-79.0	-81.4
南亞 South Asia	10.0	5.6	-70.5	-43.8
美洲 The Americas	69.9	81.9	-68.1	17.2
北美 North America	46.7	54.8	-68.2	17.3
加勒比海地區 Caribbean	10.3	16.7	-61.0	62.8
中美 Central America	3.1	4.8	-71.6	53.7
南美 South America	9.8	5.7	-72.2	-42.4
非洲 Africa	15.9	17.9	-76.8	12.4
北非 North Africa	5.5	6.1	-78.4	10.4
次撒哈拉地區 Sub-Saharan region	10.4	11.8	-75.9	13.5
中東 Middle East	19.0	14.5	-72.8	-23.7

Source: Volume 20, Issue 1, Updated January 2022, UNWTO World Tourism Barometer.

### 2021年亞洲各觀光市場入境旅客人次 Number of Inbound Visitors for Major Asian Tourism Markets in 2021

📍 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

Sources: Japan National Tourist Organization, Hong Kong Tourism Board, Korea Tourism Organization, Singapore Tourism Bureau, Malaysia Tourism Promotion Board

