



# Passport

## Travel in Taiwan

Euromonitor International

September 2021

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Some content and data have been  
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# TRAVEL IN TAIWAN - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### Travel in 2021

Travel in Taiwan continues to be impacted by various restrictions on movement not only domestically, but also globally, as a result of the pandemic as surges in cases and new variants influence government decisions...

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### COVID-19 impact on travel

The cost of outbound departures by air remains high for Taiwanese tourists when also considering the additional expense and inconvenience of having to pay for a PCR test...

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## Company response to COVID-19 in 2021: Airlines and hotels

Due to the ever-changing situation influenced by the pandemic, and to cope with different border control policies, airlines have started to share instant updates on their websites to inform...

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## Impact of COVID-19 on online bookings and travel intermediaries in 2021

Due to the stronger demand for domestic travel prior to the surge in virus cases in May 2021...

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## What next for travel?

A travel ban on visiting major source markets in Asia Pacific is likely to be lifted by the end of...

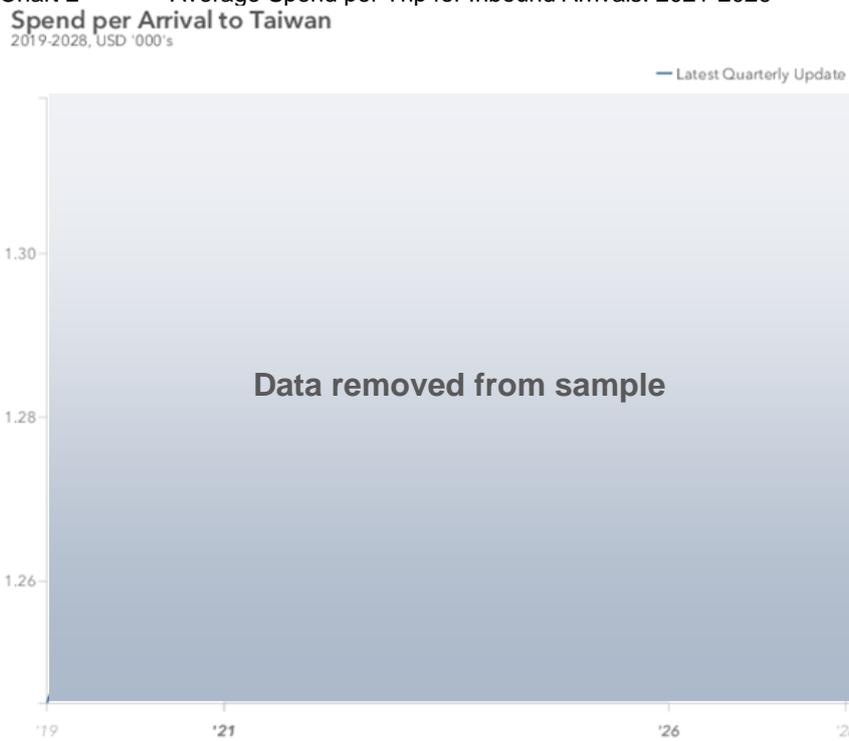
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Chart 1 Inbound Receipts: 2021-2026



Source: Euromonitor International Travel Forecast Model

Chart 2 Average Spend per Trip for Inbound Arrivals: 2021-2026



Source: Euromonitor International Travel Forecast Model

## MARKET DATA

**Table 1** Other Transport Sales: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
- Bus	<b>Data removed from sample</b>					
- Cruise						
- Ferry						
- Rail						
- Other Transport Types						
- Other Transport Offline						
- Other Transport Online						
Other Transport						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Other transport is the sum of cruise, bus, ferry, rail and other transport types, or the sum of online and offline sales

**Table 2** Other Transport Online Sales: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
-- Other Transport Online Direct	<b>Data removed from sample</b>					
-- Other Transport Online Intermediaries						
- Other Transport Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 3** Forecast Other Transport Sales: Value 2021-2026

TWD million	2021	2022	2023	2024	2025	2026
- Bus	<b>Data removed from sample</b>					
- Cruise						
- Ferry						
- Rail						
- Other Transport Types						
- Other Transport Offline						
- Other Transport Online						
Other Transport						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Other transport is the sum of cruise, bus, ferry, rail and other transport types, or the sum of online and offline sales

**Table 4** Forecast Other Transport Online Sales: Value 2021-2026

TWD million	2021	2022	2023	2024	2025	2026
-- Other Transport Online Direct	<b>Data removed from sample</b>					
-- Other Transport Online Intermediaries						
- Other Transport Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 5** Activities and Experiences: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
Attractions and Experiences	<b>Data removed from sample</b>					
- Culture, Heritage and Museums						
- Casinos						
- National Parks						
- Theme Parks						
- Other Attractions and Experiences						
- Attractions and Experiences Offline						
- Attractions and Experiences Online						
Medical Tourism						
Spas						
Activities and Experiences						

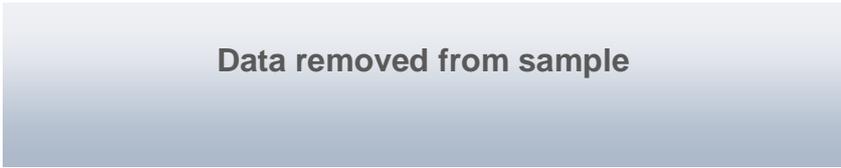
Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Attractions and experiences is the sum of culture, heritage and museums, casinos, national parks, theme parks and other attractions and experiences, or the sum of online and offline sales

**Table 6** Forecast Activities and Experiences: Value 2021-2026

TWD million	2021	2022	2023	2024	2025	2026
Attractions and Experiences	<b>Data removed from sample</b>					
- Culture, Heritage and Museums						
- Casinos						
- National Parks						
- Theme Parks						
- Other Attractions and Experiences						
- Attractions and Experiences Offline						

- Attractions and Experiences Online
- Medical Tourism
- Spas
- Activities and Experiences

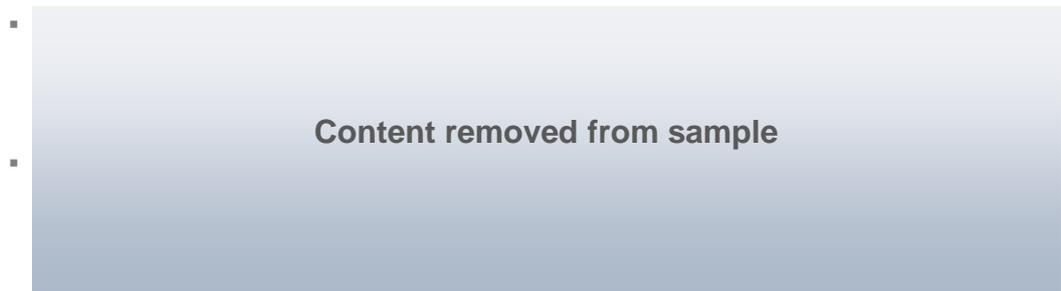


Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Attractions and experiences is the sum of culture, heritage and museums, casinos, national parks, theme parks and other attractions and experiences, or the sum of online and offline sales

## GLOBAL INDUSTRY ENVIRONMENT

- The travel industry continues to experience its biggest ever crisis, following a collapse in tourism demand worldwide due to national shutdowns to help contain COVID-19. Many travel bans and restrictions remain in place, airlines continue to ground a large proportion of their fleet, many hotels and other lodging are still closed to visitors, and business travel has been decimated.



## DISCLAIMER

Forecast closing date: 9 August 2021

Report closing date: 26 August 2021

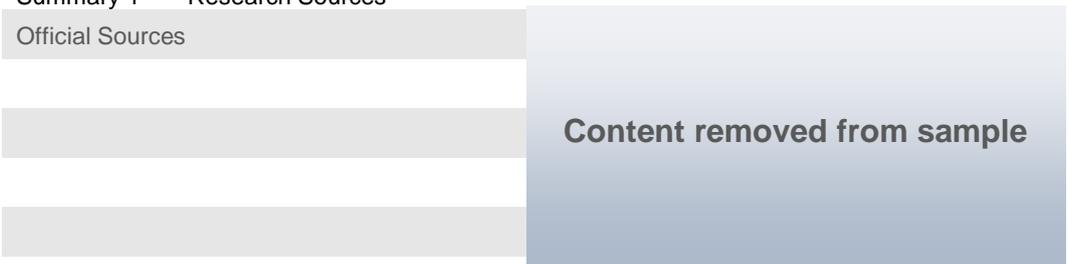
Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on [www.euromonitor.com](http://www.euromonitor.com) and via the Passport system, where new content is being added on a systematic basis.

## SOURCES

Sources used during the research included the following:

### Summary 1 Research Sources

Official Sources



Trade Associations



Trade Press



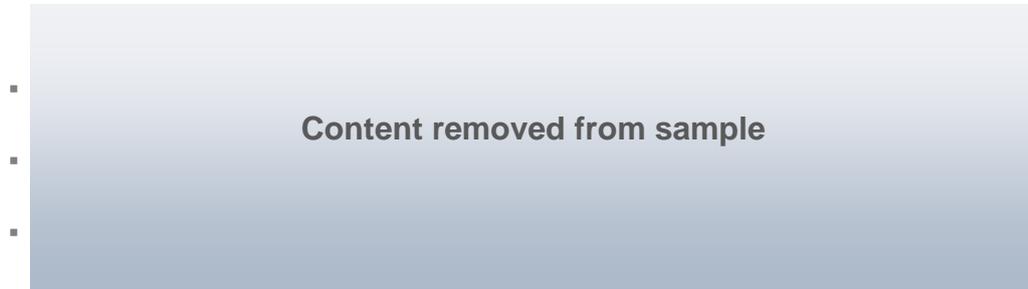
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# TOURISM FLOWS IN TAIWAN - CATEGORY ANALYSIS

## KEY DATA FINDINGS

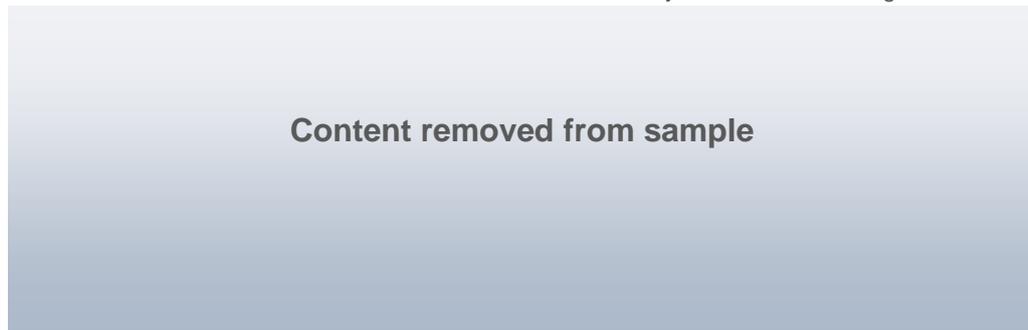
- Despite upturn for inbound arrivals and outbound departures in 2021, number of trips will...



## 2021 IMPACT

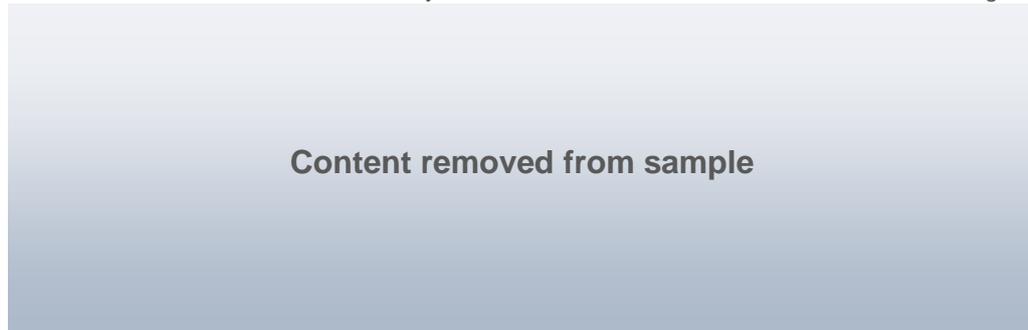
### Overseas travel remains limited with cost of travel bubbles prohibitive

Travel flows in terms of inbound arrivals to Taiwan and outbound departures continue to be limited in 2021 due to various restrictions introduced over the year in line with rising cases...



### Domestic tourism continues to offer hope to travel industry in Taiwan

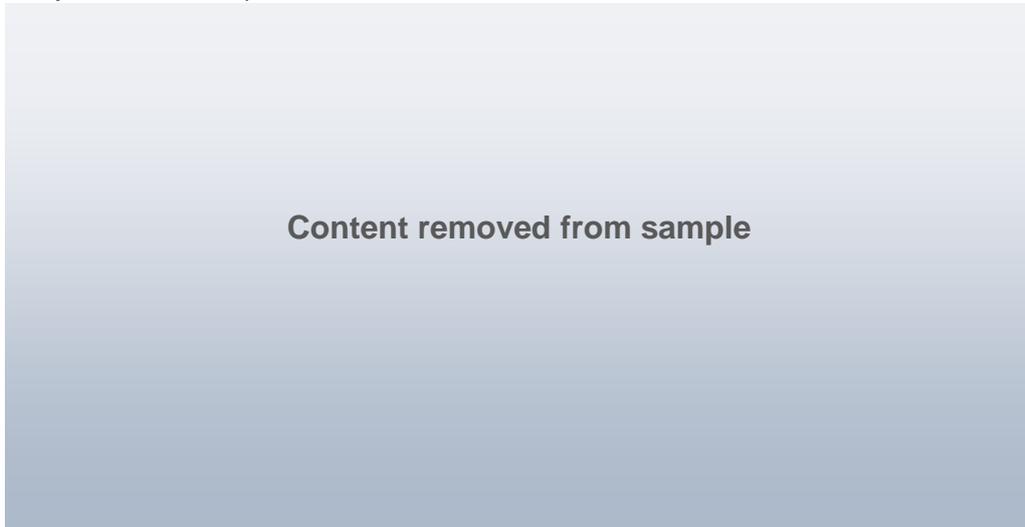
While the short-term outlook for the recovery of inbound arrivals and outbound departures remains subdued in line with uncertainty over future restrictions should there be another surge...



## RECOVERY AND OPPORTUNITIES

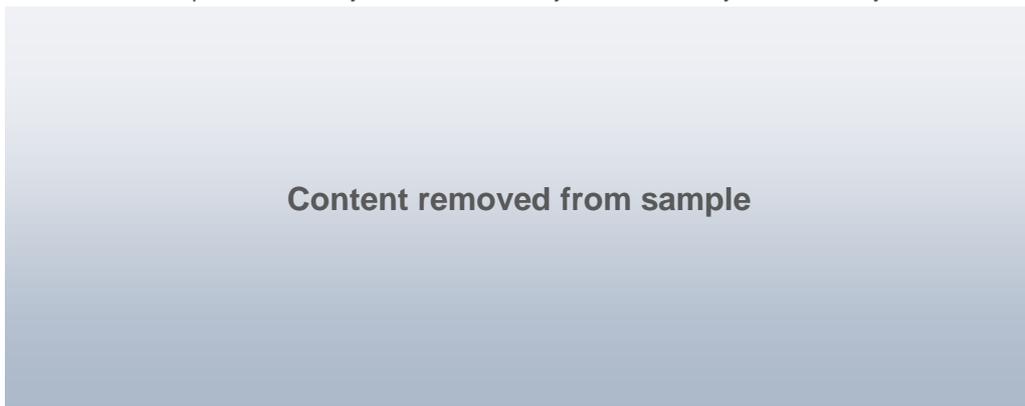
### Further strong growth in trips taken by domestic tourists expected to offer positive outlook for local travel industry

With the pandemic forcing the closure of Taiwan's borders in addition to deterrents including costly PCR tests and quarantine for visitors...



### Short-haul options to support earlier recovery of outbound departures

The travel ban placed on many Asian countries by Taiwan is likely to be lifted by the end of...



## CATEGORY DATA

Table 7 Inbound Arrivals: Number of Trips 2016-2021

'000 trips	2016	2017	2018	2019	2020	2021
- Air Arrivals	<b>Data removed from sample</b>					
- Land Arrivals						
- Rail Arrivals						
- Water Arrivals						
- Business Arrivals						

- Leisure Arrivals
- Arrivals by Country of Origin

**Data removed from sample**

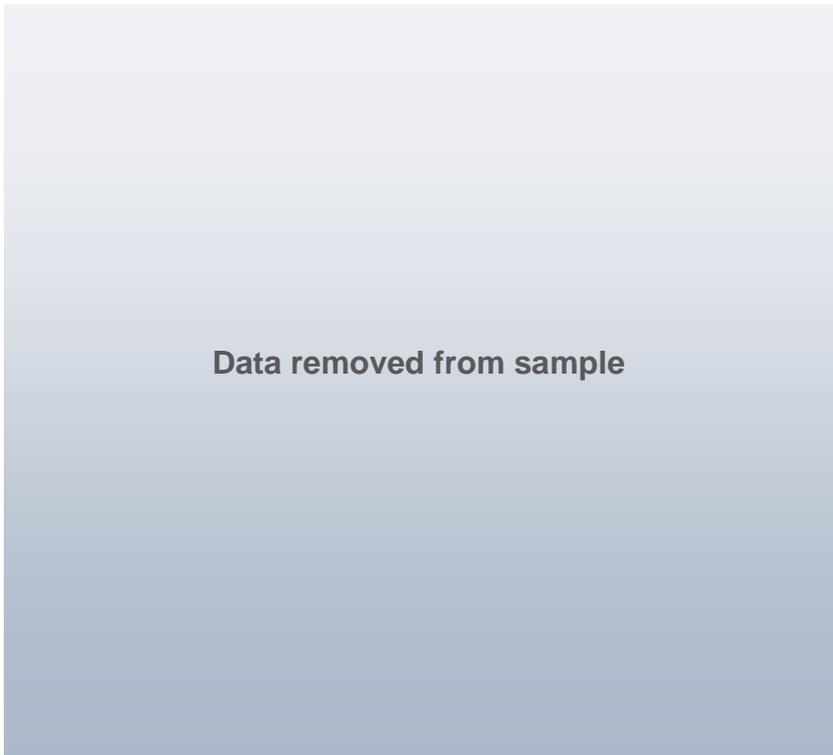
Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Inbound arrivals is the sum of air, land, rail and water arrivals, or the sum of business and leisure arrivals

**Table 8 Inbound Arrivals by Country: Number of Trips 2016-2021**

'000 trips	2016	2017	2018	2019	2020	2021
--- Arrivals from China						
--- Arrivals from Japan						
--- Arrivals from Hong Kong, China						
--- Arrivals from South Korea						
--- Arrivals from US						
--- Arrivals from Malaysia						
--- Arrivals from Singapore						
--- Arrivals from Thailand						
--- Arrivals from Philippines						
--- Arrivals from Vietnam						
--- Arrivals from Indonesia						
--- Arrivals from Canada						
--- Arrivals from Myanmar						
--- Arrivals from Cambodia						
--- Arrivals from Australia						
--- Arrivals from United Kingdom						
--- Arrivals from Germany						
--- Arrivals from Brunei Darussalam						
--- Arrivals from France						
--- Arrivals from Laos						
--- Arrivals from India						
--- Arrivals from Netherlands						
--- Arrivals from Italy						
--- Arrivals from New Zealand						
--- Arrivals from Russia						
--- Arrivals from Spain						
--- Arrivals from Switzerland						
--- Arrivals from Macau, China						
--- Arrivals from Sweden						
--- Arrivals from Belgium						
--- Arrivals from Austria						
--- Arrivals from Denmark						

- Arrivals from Saudi Arabia
- Arrivals from Norway
- Arrivals from Ireland
- Arrivals from Poland
- Arrivals from Brazil
- Arrivals from Finland
- Arrivals from South Africa
- Arrivals from Turkey
- Arrivals from United Arab Emirates
- Arrivals from Mongolia
- Arrivals from Chile
- Arrivals from Mexico
- Arrivals from Portugal
- Arrivals from Israel
- Arrivals from Ukraine
- Arrivals from Czech Republic
- Arrivals from Kuwait
- Arrivals from Egypt
- Other Countries
- Arrivals by Country of Origin



Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 9 Inbound City Arrivals 2016-2021**

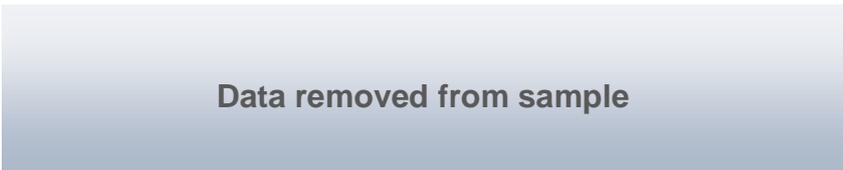
'000 trips	2016	2017	2018	2019	2020	2021
Hualien	<b>Data removed from sample</b>					
Kaoshiung						
Taichung						
Taipei						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 10 Inbound Receipts: Value 2016-2021**

TWD million	2016	2017	2018	2019	2020	2021
-- Inbound Business Receipts	<b>Data removed from sample</b>					
-- Inbound Leisure Receipts						
-- Inbound Receipts on Lodging						
-- Inbound Receipts on Activities						
-- Inbound Receipts on Food						

- Inbound Receipts on Shopping
- Inbound Receipts on Travel Modes
- Other Inbound Receipts
- Inbound Receipts



Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Activities includes attractions, guided city tours etc.

Note 2: Food includes restaurants

Note 3: Other inbound receipts include travel agent services

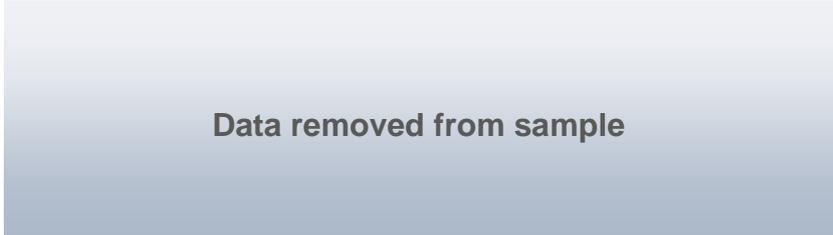
Note 4: Inbound receipts is the sum of business and leisure inbound receipts, or the sum of activities, food, shopping, travel in destination and other inbound receipts

**Table 11 Forecast Inbound Arrivals: Number of Trips 2021-2026**

'000 trips

2021 2022 2023 2024 2025 2026

- Air Arrivals
- Land Arrivals
- Rail Arrivals
- Water Arrivals
- Business Arrivals
- Leisure Arrivals
- Arrivals by Country of Origin



Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

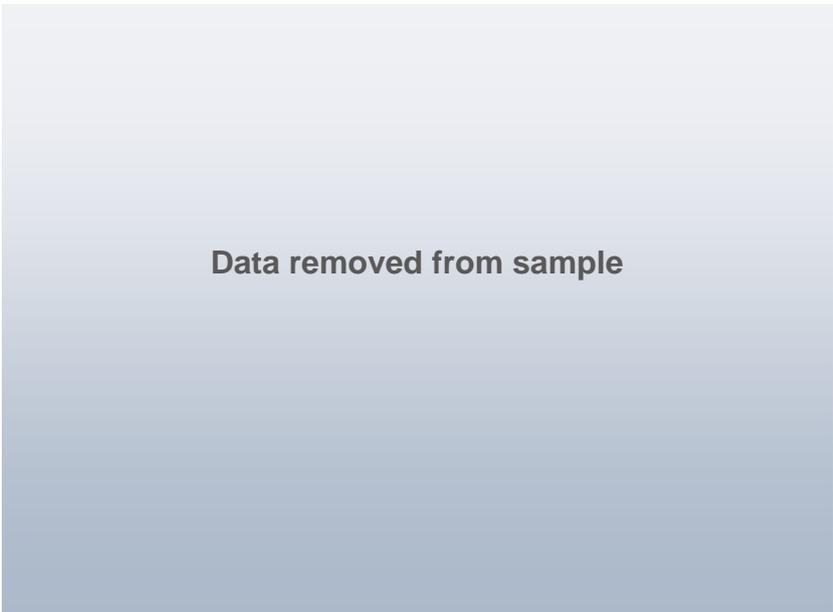
Note: Inbound arrivals is the sum of air, land, rail and water arrivals, or the sum of business and leisure arrivals

**Table 12 Forecast Inbound Arrivals by Country: Number of Trips 2021-2026**

'000 trips

2021 2022 2023 2024 2025 2026

- Arrivals from China
- Arrivals from Japan
- Arrivals from Hong Kong, China
- Arrivals from South Korea
- Arrivals from Malaysia
- Arrivals from US
- Arrivals from Singapore
- Arrivals from Philippines
- Arrivals from Thailand
- Arrivals from Vietnam
- Arrivals from Indonesia
- Arrivals from Myanmar
- Arrivals from Cambodia
- Arrivals from Canada



- Arrivals from Australia
- Arrivals from United Kingdom
- Arrivals from Germany
- Arrivals from Laos
- Arrivals from France
- Arrivals from India
- Arrivals from Brunei Darussalam
- Arrivals from Netherlands
- Arrivals from New Zealand
- Arrivals from Italy
- Arrivals from Macau, China
- Arrivals from Russia
- Arrivals from Spain
- Arrivals from Switzerland
- Arrivals from Sweden
- Arrivals from Belgium
- Arrivals from Austria
- Arrivals from Saudi Arabia
- Arrivals from Denmark
- Arrivals from Norway
- Arrivals from Poland
- Arrivals from Ireland
- Arrivals from Brazil
- Arrivals from Finland
- Arrivals from Turkey
- Arrivals from South Africa
- Arrivals from Mongolia
- Arrivals from United Arab Emirates
- Arrivals from Chile
- Arrivals from Mexico
- Arrivals from Portugal
- Arrivals from Ukraine
- Arrivals from Czech Republic
- Arrivals from Egypt
- Arrivals from Israel
- Arrivals from Kuwait
- Other Countries
- Arrivals by Country of Origin

Data removed from sample

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 13 Forecast Inbound Receipts: Value 2021-2026**

TWD million	2021	2022	2023	2024	2025	2026
-- Inbound Business Receipts	<b>Data removed from sample</b>					
-- Inbound Leisure Receipts						
-- Inbound Receipts on Lodging						
-- Inbound Receipts on Activities						
-- Inbound Receipts on Food						
-- Inbound Receipts on Shopping						
-- Inbound Receipts on Travel Modes						
-- Other Inbound Receipts						
- Inbound Receipts						

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Activities includes attractions, guided city tours, etc.

Note 2: Food includes restaurants

Note 3: Other inbound receipts include travel agent services

Note 4: Inbound receipts is the sum of business and leisure inbound receipts, or the sum of activities, food, shopping, travel in destination and other inbound receipts

**Table 14 Domestic Trips by Destination: Number of Trips 2016-2021**

'000 trips	2016	2017	2018	2019	2020	2021
- Domestic Trips By Destination	<b>Data removed from sample</b>					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 15 Domestic Business Trips by Travel Mode: Number of Trips 2016-2021**

'000 trips	2016	2017	2018	2019	2020	2021
-- Domestic Business Trips By Air	<b>Data removed from sample</b>					
-- Domestic Business Trips By Land						
-- Domestic Business Trips By Rail						
-- Domestic Business Trips By Water						
- Domestic Business Trips						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 16** Domestic Leisure Trips by Travel Mode: Number of Trips 2016-2021

'000 trips	2016	2017	2018	2019	2020	2021
-- Domestic Leisure Trips By Air	<b>Data removed from sample</b>					
-- Domestic Leisure Trips By Land						
-- Domestic Leisure Trips By Rail						
-- Domestic Leisure Trips By Water						
- Domestic Leisure Trips						
- Domestic Leisure Trips						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 17** Domestic Expenditure: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
-- Domestic Business Expenditure	<b>Data removed from sample</b>					
-- Domestic Leisure Expenditure						
-- Domestic Expenditure on Activities						
-- Domestic Expenditure on Food						
-- Domestic Expenditure on Lodging						
-- Domestic Expenditure on Shopping						
-- Domestic Expenditure on Travel Modes						
-- Other Domestic Expenditure						
- Domestic Expenditure						
- Domestic Expenditure						
- Domestic Expenditure						
- Domestic Expenditure						
- Domestic Expenditure						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Domestic expenditure is the sum of business and leisure domestic expenditure, or the sum of activities, food, shopping, travel in destination and other domestic expenditure

**Table 18** Forecast Domestic Business Trips by Travel Mode: Number of Trips 2021-2026

'000 trips	2021	2022	2023	2024	2025	2026
-- Domestic Business Trips By Air	<b>Data removed from sample</b>					
-- Domestic Business Trips By Land						
-- Domestic Business Trips By Rail						
-- Domestic Business Trips By Water						
- Domestic Business Trips						

- Domestic Business Trips

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 19 Forecast Domestic Leisure Trips by Travel Mode: Number of Trips 2021-2026**

'000 trips

2021 2022 2023 2024 2025 2026

- Domestic Leisure Trips By Air
- Domestic Leisure Trips By Land
- Domestic Leisure Trips By Rail
- Domestic Leisure Trips By Water
- Domestic Leisure Trips

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 20 Forecast Domestic Expenditure: Value 2021-2026**

TWD million

2021 2022 2023 2024 2025 2026

- Domestic Business Expenditure
- Domestic Leisure Expenditure
- Domestic Expenditure on Activities
- Domestic Expenditure on Food
- Domestic Expenditure on Lodging
- Domestic Expenditure on Shopping
- Domestic Expenditure on Travel Modes
- Other Domestic Expenditure
- Domestic Expenditure

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Domestic expenditure is the sum of business and leisure domestic expenditure, or the sum of activities, food, shopping, travel in destination and other domestic expenditure

**Table 21 Outbound Departures: Number of Trips 2016-2021**

'000 trips

2016 2017 2018 2019 2020 2021

- Air Outbound
- Land Outbound

**Data removed from sample**

- Rail Outbound
- Water Outbound
- Business Outbound
- Leisure Outbound
- Outbound Departures Source Markets

**Data removed from sample**

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Outbound departures is the sum of air, land, rail and water outbound departures, or the sum of business and leisure outbound departures

**Table 22 Outbound Departures by Destination: Number of Trips 2016-2021**

'000 trips	2016	2017	2018	2019	2020	2021
--- Outbound Departures to Japan	<b>Data removed from sample</b>					
--- Outbound Departures to China						
--- Outbound Departures to US						
--- Outbound Departures to Hong Kong, China						
--- Outbound Departures to Macau, China						
--- Outbound Departures to Thailand						
--- Outbound Departures to Vietnam						
--- Outbound Departures to Germany						
--- Outbound Departures to Czech Republic						
--- Outbound Departures to Albania						
--- Outbound Departures to Switzerland						
--- Outbound Departures to Austria						
--- Outbound Departures to South Korea						
--- Outbound Departures to Spain						
--- Outbound Departures to Singapore						
--- Outbound Departures to Croatia						
--- Outbound Departures to Philippines						
--- Outbound Departures to Turkey						
--- Outbound Departures to Indonesia						
--- Outbound Departures to France						
--- Outbound Departures to Australia						
--- Outbound Departures						

to Canada  
--- Outbound Departures  
to United Kingdom  
--- Outbound Departures  
to Cambodia  
--- Outbound Departures  
to Portugal  
--- Outbound Departures  
to India  
--- Outbound Departures  
to Poland  
--- Outbound Departures  
to Slovakia  
--- Outbound Departures  
to Belgium  
--- Outbound Departures  
to Egypt  
--- Outbound Departures  
to United Arab Emirates  
--- Outbound Departures  
to Iceland  
--- Outbound Departures  
to New Zealand  
--- Outbound Departures  
to Maldives  
--- Outbound Departures  
to Netherlands  
--- Outbound Departures  
to Greece  
--- Outbound Departures  
to Denmark  
--- Outbound Departures  
to Myanmar  
--- Outbound Departures  
to Italy  
--- Outbound Departures  
to Israel  
--- Outbound Departures  
to Finland  
--- Outbound Departures  
to Ireland  
--- Outbound Departures  
to Guam  
--- Outbound Departures  
to Russia  
--- Outbound Departures  
to Hungary  
--- Outbound Departures  
to Slovenia  
--- Outbound Departures  
to Peru  
--- Outbound Departures  
to Norway  
--- Outbound Departures  
to Sri Lanka  
--- Outbound Departures  
to South Africa  
Other Countries  
- Outbound Departures  
Source Markets

Data removed from sample

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 23** Outbound Expenditure: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
-- Outbound Business Expenditure	<b>Data removed from sample</b>					
-- Outbound Leisure Expenditure						
-- Outbound Expenditure on Lodging						
-- Outbound Expenditure on Activities						
-- Outbound Expenditure on Food						
-- Outbound Expenditure on Shopping						
-- Outbound Expenditure on Travel Modes						
-- Other Outbound Expenditure						
- Outbound Expenditure						

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Outbound expenditure is the sum of business and leisure outbound expenditure, or the sum of activities, food, shopping, travel in destination and other outbound expenditure

**Table 24** Forecast Outbound Departures: Number of Trips 2021-2026

'000 trips	2021	2022	2023	2024	2025	2026
- Air Outbound	<b>Data removed from sample</b>					
- Land Outbound						
- Rail Outbound						
- Water Outbound						
- Business Outbound						
- Leisure Outbound						
- Outbound Departures Source Markets						

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Outbound departures is the sum of air, land, rail and water outbound departures, or the sum of business and leisure outbound departures

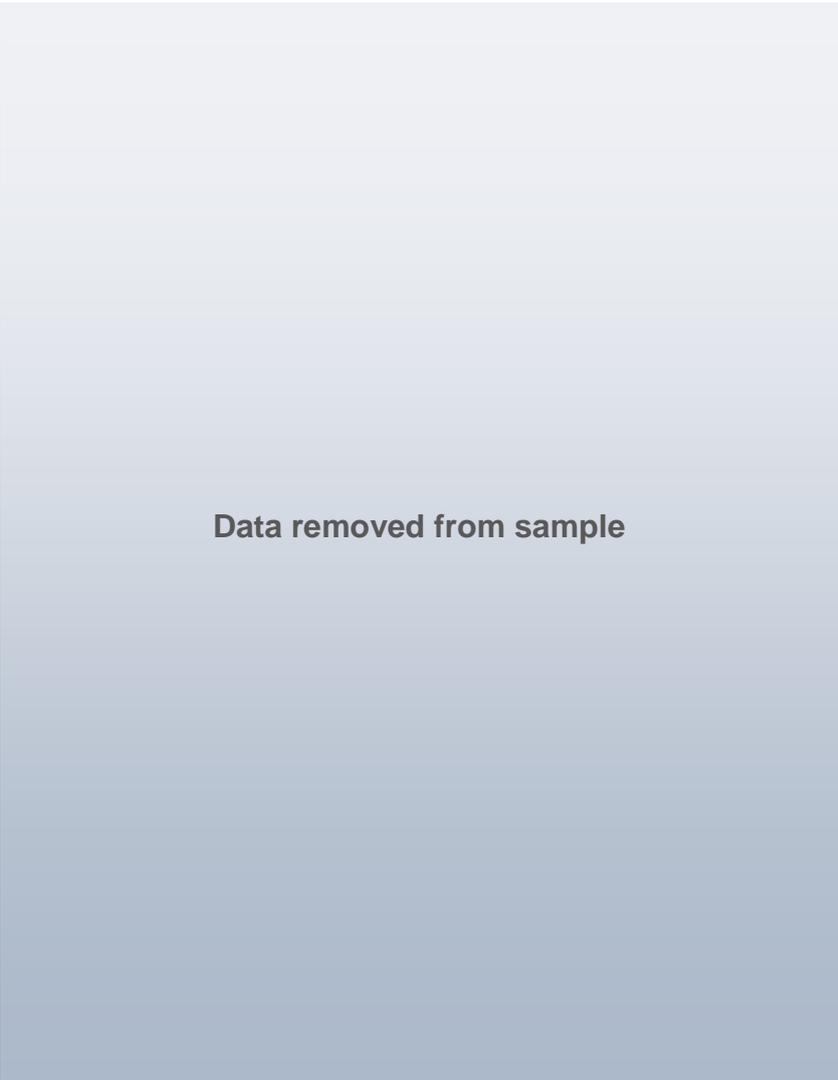
**Table 25** Forecast Outbound Departures by Destination: Number of Trips 2021-2026

'000 trips	2021	2022	2023	2024	2025	2026
--- Outbound Departures to China	<b>Data removed from sample</b>					

- Outbound Departures to Japan
- Outbound Departures to South Korea
- Outbound Departures to Macau, China
- Outbound Departures to Vietnam
- Outbound Departures to Thailand
- Outbound Departures to Hong Kong, China
- Outbound Departures to US
- Outbound Departures to Singapore
- Outbound Departures to Malaysia
- Outbound Departures to Germany
- Outbound Departures to Philippines
- Outbound Departures to Czech Republic
- Outbound Departures to Australia
- Outbound Departures to Albania
- Outbound Departures to Switzerland
- Outbound Departures to Croatia
- Outbound Departures to Spain
- Outbound Departures to Austria
- Outbound Departures to Cambodia
- Outbound Departures to Canada
- Outbound Departures to Turkey
- Outbound Departures to Indonesia
- Outbound Departures to United Kingdom
- Outbound Departures to Netherlands
- Outbound Departures to Portugal
- Outbound Departures to India
- Outbound Departures to Slovakia
- Outbound Departures to New Zealand
- Outbound Departures to France
- Outbound Departures to Myanmar
- Outbound Departures

**Data removed from sample**

- to Poland
- Outbound Departures to Finland
- Outbound Departures to Hungary
- Outbound Departures to United Arab Emirates
- Outbound Departures to Slovenia
- Outbound Departures to Belgium
- Outbound Departures to Guam
- Outbound Departures to Iceland
- Outbound Departures to Maldives
- Outbound Departures to Egypt
- Outbound Departures to Greece
- Outbound Departures to Israel
- Outbound Departures to Nepal
- Outbound Departures to Norway
- Outbound Departures to Latvia
- Outbound Departures to Russia
- Outbound Departures to Morocco
- Outbound Departures to Denmark
- Outbound Departures to Italy
- Other Countries
- Outbound Departures
- Source Markets



Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 26 Forecast Outbound Expenditure: Value 2021-2026**

TWD million

	2021	2022	2023	2024	2025	2026
-- Outbound Business Expenditure	<b>Data removed from sample</b>					
-- Outbound Leisure Expenditure						
-- Outbound Expenditure on Lodging						
-- Outbound Expenditure on Activities						
-- Outbound Expenditure on Food						
-- Outbound Expenditure						

- on Shopping
- Outbound Expenditure on Travel Modes
- Other Outbound Expenditure
- Outbound Expenditure

**Data removed from sample**

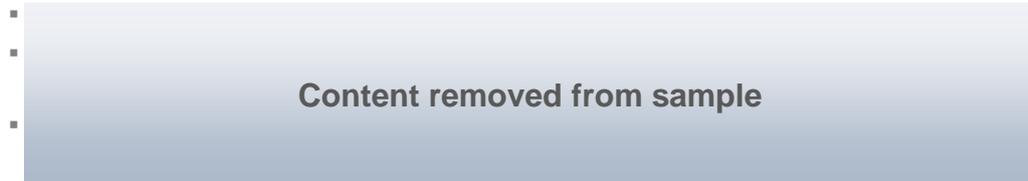
Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Outbound expenditure is the sum of business and leisure outbound expenditure, or the sum of activities, food, shopping, travel in destination and other outbound expenditure

# AIRLINES IN TAIWAN - CATEGORY ANALYSIS

## KEY DATA FINDINGS

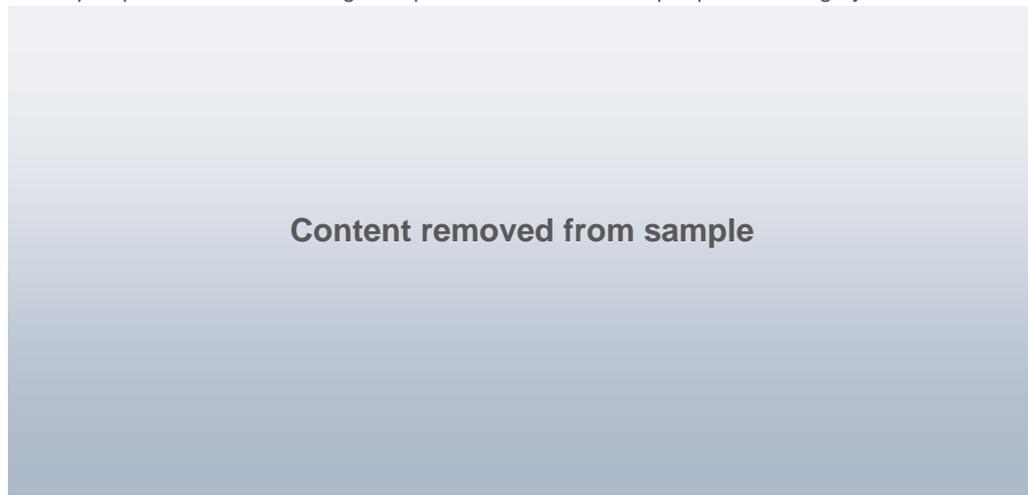
- Passenger numbers remain significantly lower than pre-pandemic levels in 2021 due to ongoing restrictions and caution over air travel



## 2021 IMPACT

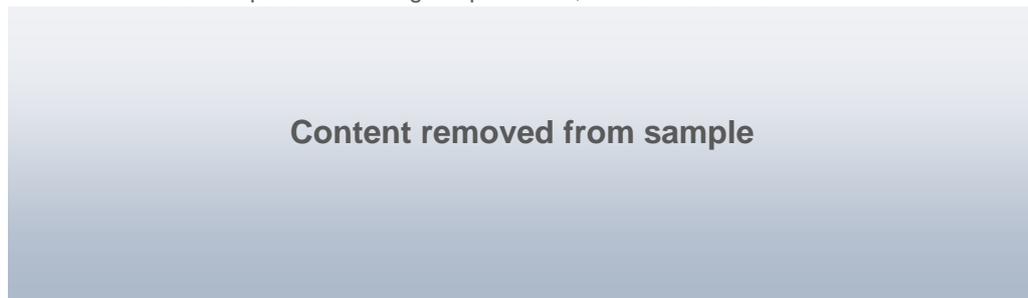
### Airlines continue to suffer heavy losses as COVID-19 worsens in Taiwan mid-2021

Despite predictions for a marginal upturn in the number of people travelling by air...



### Airlines continue to adapt with different strategies

With limitations on operations during the pandemic, airlines have been forced to consider...



## RECOVERY AND OPPORTUNITIES

### Health and safety protocols to become key assessment for airline quality

Due to the ever-changing situation influenced by the pandemic, and to address different...

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### Flexibility will become standard amidst ongoing uncertainty

With an early focus on promoting domestic tourism by industry players in Taiwan...

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## CATEGORY DATA

**Table 27** Airlines Sales: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
- Charter	<b>Data removed from sample</b>					
- Low Cost Carriers						
- Scheduled Airlines						
- Airlines Offline						
- Airlines Online						
Airlines						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Airlines is the sum of charter, low cost carriers and scheduled, or the sum of online and offline sales

**Table 28** Airlines Online Sales: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
-- Airlines Online Direct	<b>Data removed from sample</b>					
-- Airlines Online Intermediaries						
- Airlines Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 29** Airlines: Passengers Carried 2016-2021

'000 persons	2016	2017	2018	2019	2020	2021
- Charter	<b>Data removed from sample</b>					
- Low Cost Carriers						
- Scheduled Airlines						
Airlines						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 30** Airlines NBO Company Shares: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020	2021
	<b>Data removed from sample</b>					

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 31 Charter Airlines Brands by Key Performance Indicators 2021**

LBN (NBO)	% Average Load Factor	Average Price Per Passenger (Local currency)	Number of People ('000)
-----------	-----------------------	--	-------------------------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 32 Low Cost Carriers Airlines Brands by Key Performance Indicators 2021**

LBN (NBO)	% Average Load Factor	Average Price Per Passenger (Local currency)	Number of People ('000)
-----------	-----------------------	--	-------------------------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 33 Scheduled Airlines Brands by Key Performance Indicators 2021

LBN (NBO)	% Average Load Factor	Average Price Per Passenger (Local currency)	Number of People ('000)
-----------	-----------------------	--	-------------------------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 34 Forecast Airlines Sales: Value 2021-2026

TWD million	2021	2022	2023	2024	2025	2026
- Charter	<b>Data removed from sample</b>					
- Low Cost Carriers						
- Scheduled Airlines						
- Airlines Offline						
- Airlines Online						
Airlines						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Airlines is the sum of charter, low cost carriers and scheduled, or the sum of online and offline sales

Table 35 Forecast Airlines Online Sales: Value 2021-2026

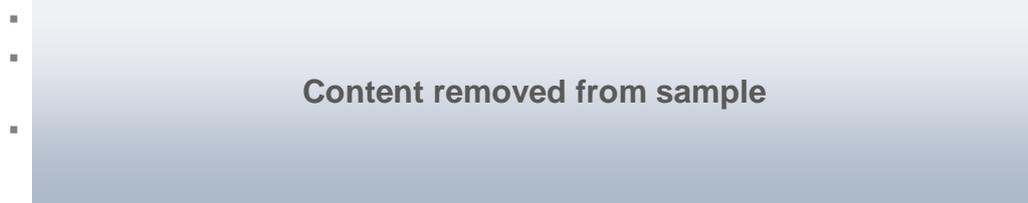
TWD million	2021	2022	2023	2024	2025	2026
-- Airlines Online Direct	<b>Data removed from sample</b>					
-- Airlines Online Intermediaries						
- Airlines Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

# CAR RENTAL (DESTINATION) IN TAIWAN - CATEGORY ANALYSIS

## KEY DATA FINDINGS

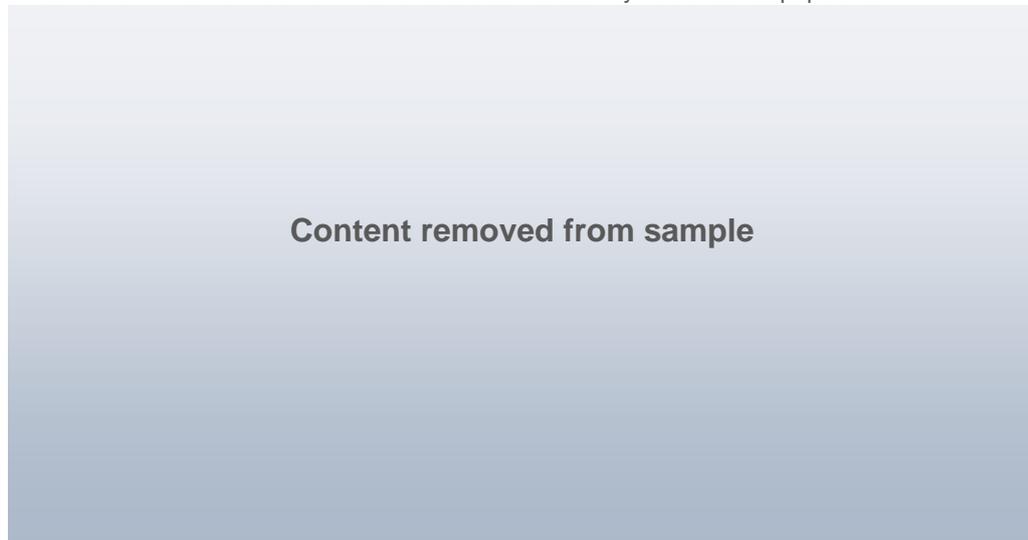
- Business car rental continues to be impacted by web conferencing and limited arrivals in 2021



## 2021 IMPACT

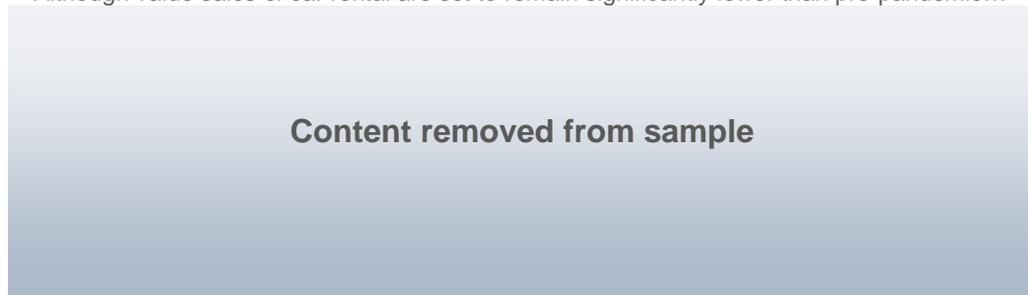
Car rental's small size is further depleted by the pandemic as business travel is replaced by web conferencing

Car rental in Taiwan is small in size because the country has a dense population with...



Transactions up, value remains subdued

Although value sales of car rental are set to remain significantly lower than pre-pandemic...



## RECOVERY AND OPPORTUNITIES

### Car rental services to continue moving towards online model

The pandemic has drawn greater attention to online news allowing access to information...

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### Heightened health concerns could push further focus on local self-drive tours over early part of the forecast period

The number of business arrivals is unlikely to fully recover until the end of the forecast...

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## CATEGORY DATA

**Table 36 Car Rental Sales: Value 2016-2021**

TWD million	2016	2017	2018	2019	2020	2021
- Business Car Rental	<b>Data removed from sample</b>					
- Leisure Car Rental						
- Insurance Replacement Car Rental						
- Car Rental Offline						
- Car Rental Online						
Car Rental (Destination)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Car rental is the sum of business, leisure and insurance replacement, or the sum of online and offline sales

**Table 37 Car Rental Online Sales: Value 2016-2021**

TWD million	2016	2017	2018	2019	2020	2021
-- Car Rental Online Direct	<b>Data removed from sample</b>					
-- Car Rental Online Intermediaries						
- Car Rental Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 38 Structure of Car Rental Market 2016-2021**

	2016	2017	2018	2019	2020	2021
Fleet Size '000	<b>Data removed from sample</b>					
Operators						
Transactions '000						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 39 Car Rental NBO Company Shares: % Value 2016-2020**

% retail value rsp Company	2016	2017	2018	2019	2020	2021
	<b>Data removed from sample</b>					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 40 Car Rental Brands by Key Performance Indicators 2021**

LBN (NBO)	Average number of transactions per car	Average Rental Duration	Average Sales Per Transaction (Local currency)	Daily Spend Per Transaction (Local currency)	Fleet Size ('000)	Transactions ('000)
-----------	--	-------------------------	--	--	-------------------	---------------------

**Data removed from sample**

LBN (NBO)	Utilisation (%)
-----------	-----------------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Average rental duration refers to number of days

**Table 41 Forecast Car Rental Sales: Value 2021-2026**

TWD million	2021	2022	2023	2024	2025	2026
-------------	------	------	------	------	------	------

- Business Car Rental
- Leisure Car Rental
- Insurance Replacement Car Rental
- Car Rental Offline
- Car Rental Online
- Car Rental (Destination)

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Car rental is the sum of business, leisure and insurance replacement, or the sum of online and offline sales

**Table 42 Forecast Car Rental Online Sales: Value 2021-2026**

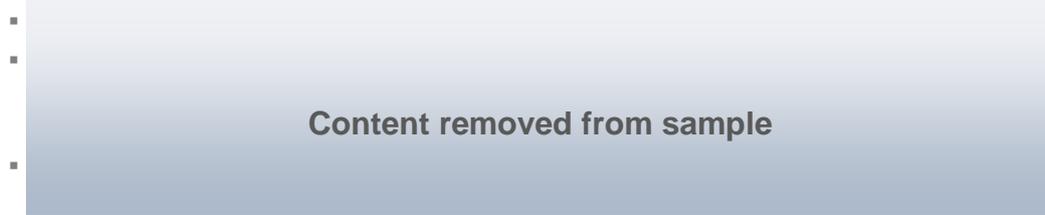
TWD million	2021	2022	2023	2024	2025	2026
-- Car Rental Online Direct	<b>Data removed from sample</b>					
-- Car Rental Online Intermediaries						
- Car Rental Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

# LODGING IN TAIWAN - CATEGORY ANALYSIS

## KEY DATA FINDINGS

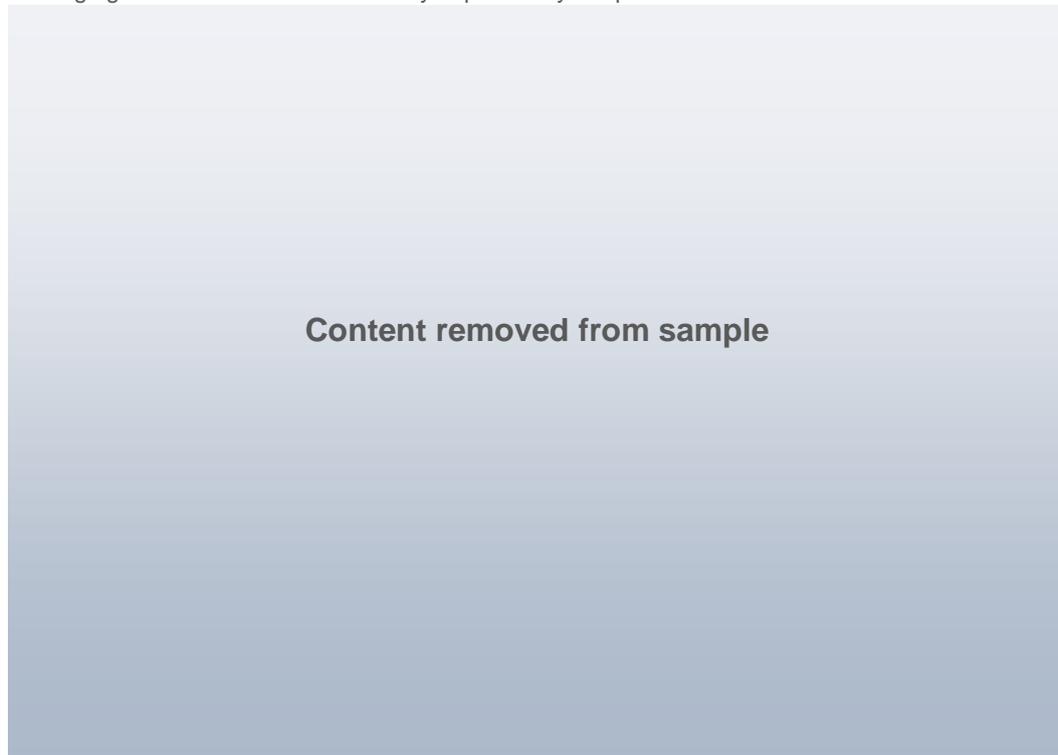
- Lodging, particularly hotels, continues to struggle with limited inbound arrivals and greater focus by domestic tourists on nature, countryside and social distancing in 2021



## 2021 IMPACT

### Slow vaccination rate weakens local consumer sentiment in terms of overnight stays in city-based hotels

Lodging in Taiwan has been severely impacted by the pandemic and the measures taken to...



## Central city hotels continue to struggle with lack of international tourists

Despite ongoing reluctance amongst domestic tourists to spend on lodging, sales per outlet...

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## RECOVERY AND OPPORTUNITIES

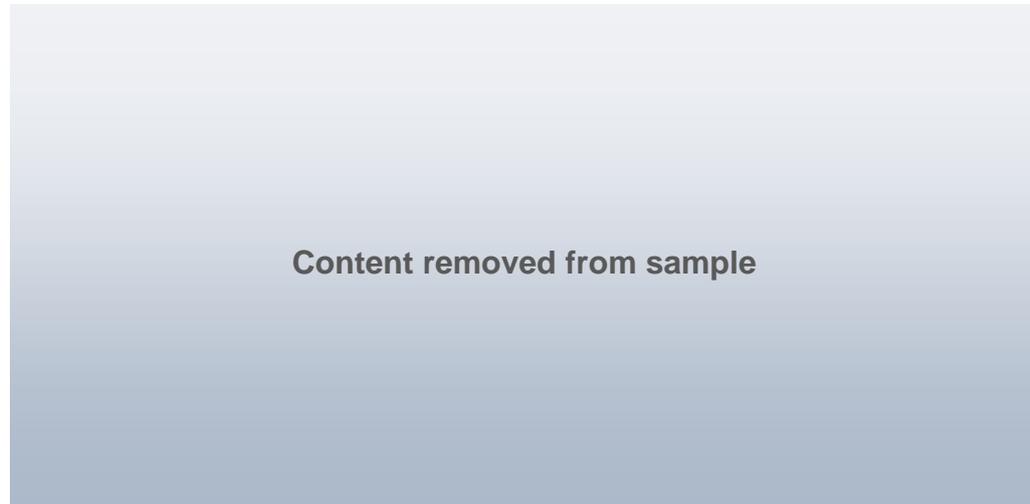
### Resorts and villas can expand consumer base with dedicated services and tours to improve domestic holiday experience

With travel and tourism players likely to continue to focus their efforts on driving domestic demand towards the end of 2021...

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### Domestic demand will continue to boom in short term due to hesitancy over outbound travel, while inbound receipts for lodging set to improve

Tourism targeting foreign visitors has severely declined during the pandemic, with hotels in particular shifting their focus towards domestic tourists...



### CATEGORY DATA

Table 43 Lodging Sales: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
Hotels	<b>Data removed from sample</b>					
Short-Term Rentals						
Other Lodging						
Lodging Offline						
Lodging Online						
Lodging						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Lodging is the sum of hotels, short-term rentals and other lodging, or the sum of offline and online sales

Table 44 Lodging Online Sales: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
- Lodging Online Direct	<b>Data removed from sample</b>					
- Lodging Intermediaries (Destination)						
Lodging Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 45 Hotels Sales: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
- Luxury and Upscale Hotels	<b>Data removed from sample</b>					
- Mid-Market Hotels						
- Budget Hotels						
- Unrated Hotels						
- Hotels Offline						
- Hotels Online						
Hotels						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Hotels is the sum of luxury, mid-market, budget and unrated hotels, or the sum of offline and online sales

Table 46 Hotels Online Sales: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
-- Hotels Online Direct	<b>Data removed from sample</b>					
-- Hotels Online Intermediaries						
- Hotels Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 47 Other Lodging Sales: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
- Campsites	<b>Data removed from sample</b>					
- Hostels						
- Other Lodging Types						
- Other Lodging Offline						
- Other Lodging Online						
Other Lodging						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Other lodging is the sum of campsites, hostels and other lodging types, or the sum of offline and online sales

Table 48 Other Lodging Online Sales: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
-- Other Lodging Online Direct	<b>Data removed from sample</b>					
-- Other Lodging Online Intermediaries						

## - Other Lodging Online

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 49 Lodging Outlets: Units 2016-2021

outlets	2016	2017	2018	2019	2020	2021
- Luxury and Upscale Hotels	<b>Data removed from sample</b>					
- Mid-Market Hotels						
- Budget Hotels						
- Unrated Hotels						
Hotels						
Short-Term Rentals						
- Campsites						
- Hostels						
- Other Lodging Types						
Other Lodging						
Lodging						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Lodging is the sum of hotels, short term rentals and other lodging, or the sum of all hotel types, short-term rentals, campsites, hostels and other lodging types

Table 50 Lodging: Number of Rooms 2016-2021

'000 rooms	2016	2017	2018	2019	2020	2021
Hotels	<b>Data removed from sample</b>					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

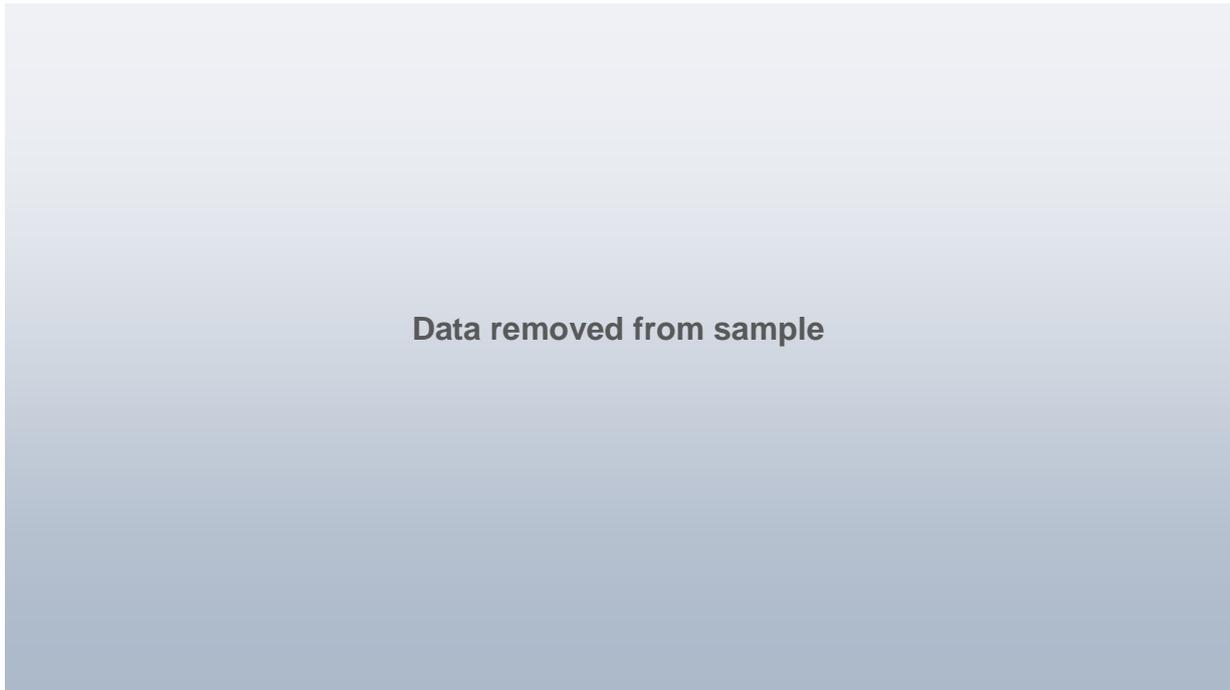
Table 51 Lodging by Incoming vs Domestic: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Domestic	<b>Data removed from sample</b>					
Incoming						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 52 Hotels NBO Company Shares: % Value 2016-2020

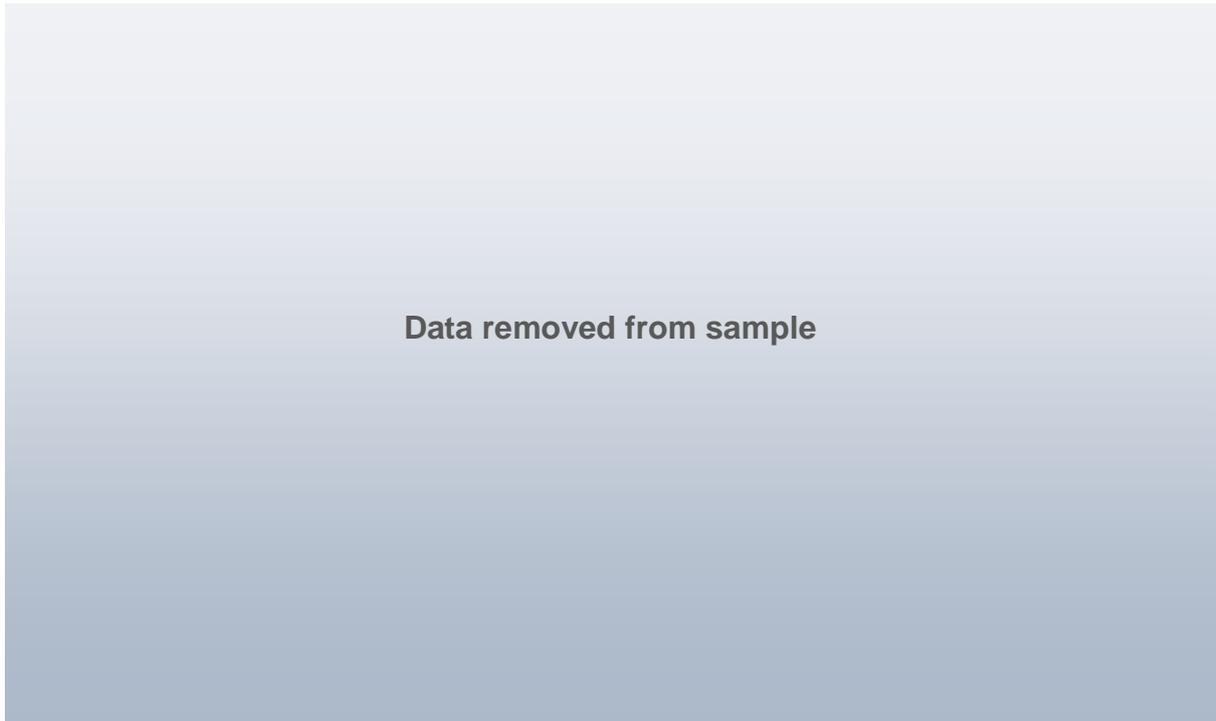
% retail value rsp Company	2016	2017	2018	2019	2020	2021
	<b>Data removed from sample</b>					



Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 53 Hotel Brands by Key Performance Indicators 2021

LBN (NBO)	Outlets	Rooms ('000)
-----------	---------	--------------



**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources  
 Note 1: Hotel rooms and outlets are sourced mainly from the hotel companies themselves from websites, trade interviews and/or company reports  
 Note 2: Sales per outlet refers to million local currency; sales per room refers to '000 local currency

**Table 54 Forecast Lodging Sales: Value 2021-2026**

TWD million	2021	2022	2023	2024	2025	2026
Hotels	<b>Data removed from sample</b>					
Short-Term Rentals						
Other Lodging						
Lodging Offline						
Lodging Online						
Lodging						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources  
 Note: Lodging is the sum of hotels, short-term rentals and other lodging, or the sum of offline and online sales

**Table 55 Forecast Lodging Online Sales: Value 2021-2026**

TWD million	2021	2022	2023	2024	2025	2026
- Lodging Online Direct	<b>Data removed from sample</b>					
- Lodging Intermediaries (Destination)						
Lodging Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 56 Forecast Hotels Sales: Value 2021-2026**

TWD million	2021	2022	2023	2024	2025	2026
- Luxury and Upscale Hotels	<b>Data removed from sample</b>					
- Mid-Market Hotels						
- Budget Hotels						

- Unrated Hotels
  - Hotels Offline
  - Hotels Online
- Hotels

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Hotels is the sum of luxury, mid-market, budget and unrated hotels, or the sum of offline and online sales

**Table 57 Forecast Hotels Online Sales: Value 2021-2026**

TWD million

2021      2022      2023      2024      2025      2026

- Hotels Online Direct
- Hotels Online Intermediaries
- Hotels Online

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 58 Forecast Other Lodging Sales: Value 2021-2026**

TWD million

2021      2022      2023      2024      2025      2026

- Campsites
  - Hostels
  - Other Lodging Types
  - Other Lodging Offline
  - Other Lodging Online
- Other Lodging

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Other lodging is the sum of campsites, hostels and other lodging types, or the sum of offline and online sales

**Table 59 Forecast Other Lodging Online Sales: Value 2021-2026**

TWD million

2021      2022      2023      2024      2025      2026

- Other Lodging Online Direct
- Other Lodging Online Intermediaries
- Other Lodging Online

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 60 Forecast Lodging Outlets: Units 2021-2026**

outlets	2021	2022	2023	2024	2025	2026
- Luxury and Upscale Hotels	<b>Data removed from sample</b>					
- Mid-Market Hotels						
- Budget Hotels						
- Unrated Hotels						
Hotels						
Short-Term Rentals						
- Campsites						
- Hostels						
- Other Lodging Types						
Other Lodging						
Lodging						

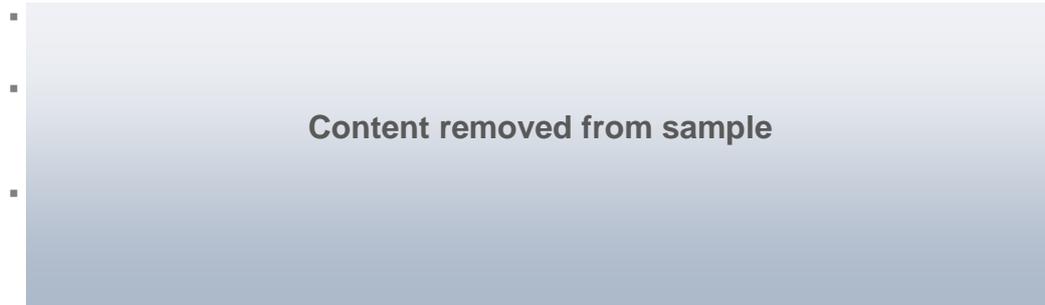
Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Lodging is the sum of hotels, short term rentals and other lodging, or the sum of all hotel types, short-term rentals, campsites, hostels and other lodging types

# ONLINE TRAVEL AND INTERMEDIARIES IN TAIWAN - CATEGORY ANALYSIS

## KEY DATA FINDINGS

- Limited foreign travel opportunities continue to negatively impact demand for largest travel intermediaries categories of package holidays and flights in 2021



## 2021 IMPACT

Traditional travel intermediaries which rely on bookings of overseas tours continue to struggle

After the booking of package holidays, demand through travel intermediaries in Taiwan...



### Further switch towards online sales encourages investment in digital strategies

Sales through online travel agencies have also been significantly hit by loss of foreign...

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### RECOVERY AND OPPORTUNITIES

#### Products developed for domestic travel to be adapted to foreign tourists once borders reopen

Due to the stronger demand for domestic travel products prior to May's surge in virus...

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#### Consumers to demand greater flexibility and convenience, prompting further shift towards online sales

Convenience, safety and flexibility are likely to be important factors which consumers consider...

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## CATEGORY DATA

Table 61 Travel Intermediaries Sales: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
- Intermediaries Air	<b>Data removed from sample</b>					
- Intermediaries Car Rental						
- Intermediaries Cruise						
- Intermediaries Other Transport						
- Intermediaries Lodging						
- Intermediaries Package Holidays						
- Intermediaries Other						
- Intermediaries Online						
- Intermediaries Offline						
- Intermediaries Business						
- Intermediaries Leisure						
Travel Intermediaries						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Intermediaries is the sum of air, car rental, cruise, other transport, lodging, package holidays, travel insurance and other intermediaries sales, the sum of offline and online sales or the sum of corporate business and leisure sales

Table 62 Intermediaries Corporate Business Online Sales: Value 2016-2021

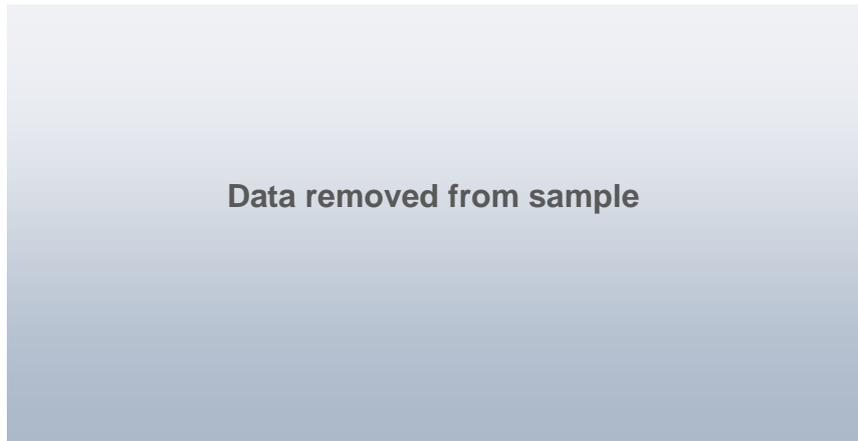
TWD million	2016	2017	2018	2019	2020	2021
-- Intermediaries Business Online	<b>Data removed from sample</b>					
--- Intermediaries Business Air Online						
--- Intermediaries Business Car Rental Online						
--- Intermediaries Business Other Transport Online						
--- Intermediaries Business Lodging Online						
--- Intermediaries Business Other Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 63 Intermediaries Leisure Online Sales: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
-- Intermediaries Leisure Online	<b>Data removed from sample</b>					

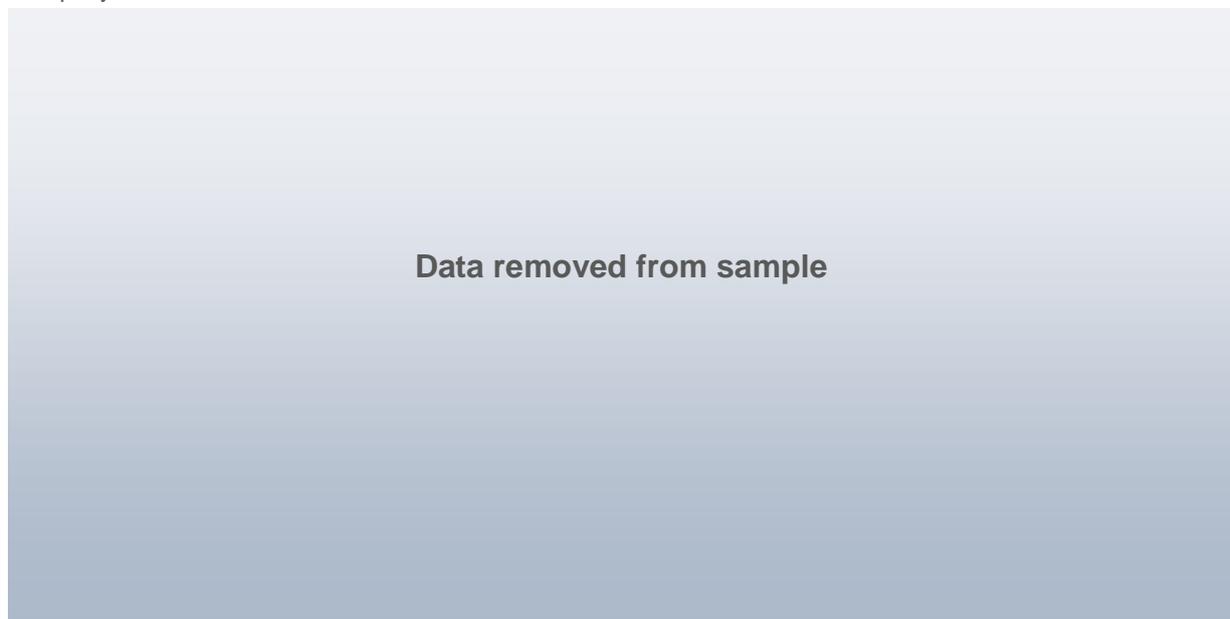
- Intermediaries  
Leisure Air Online
- Intermediaries  
Leisure Car Rental Online
- Intermediaries  
Leisure Cruise Online
- Intermediaries  
Leisure Other Transport  
Online
- Intermediaries  
Leisure Lodging Online
- Intermediaries  
Leisure Package  
Holidays Online
- Intermediaries  
Leisure Other Online



Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 64** Travel Intermediaries NBO Company Shares: % Value 2016-2021

% retail value rsp Company	2016	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------	------

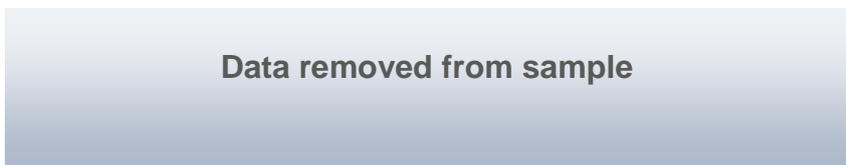


Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 65** Online Travel Sales to Residents: Value 2016-2021

TWD million	2016	2017	2018	2019	2020	2021
-------------	------	------	------	------	------	------

- Online Travel  
Agencies Sales
- Other Travel  
Intermediaries Online  
Sales



- Airlines Direct Online Sales
- Other Transport Direct Online Sales
- Lodging Direct Online Sales
- Car Rental Direct Online Sales
- Other Direct Online Sales
- Online Travel Sales

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 66 Total Mobile Travel Sales to Residents: Value 2016-2021**

TWD million

	2016	2017	2018	2019	2020	2021
Mobile Travel Sales	<b>Data removed from sample</b>					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 67 Forecast Travel Intermediaries Sales: Value 2021-2026**

TWD million

	2021	2022	2023	2024	2025	2026
- Intermediaries Air Rental	<b>Data removed from sample</b>					
- Intermediaries Cruise						
- Intermediaries Other Transport						
- Intermediaries Lodging						
- Intermediaries Package Holidays						
- Intermediaries Other						
- Intermediaries Online						
- Intermediaries Offline						
- Intermediaries Business						
- Intermediaries Leisure						
Travel Intermediaries						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Intermediaries is the sum of air, car rental, cruise, other transport, lodging, package holidays, travel insurance and other intermediaries sales, the sum of offline and online sales or the sum of corporate business and leisure sales

**Table 68 Forecast Intermediaries Corporate Business Online Sales: Value 2021-2026**

TWD million	2021	2022	2023	2024	2025	2026
-- Intermediaries Business Online	<b>Data removed from sample</b>					
--- Intermediaries Business Air Online						
--- Intermediaries Business Car Rental Online						
--- Intermediaries Business Other Transport Online						
--- Intermediaries Business Lodging Online						
--- Intermediaries Business Other Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 69 Forecast Intermediaries Leisure Online Sales: Value 2021-2026**

TWD million	2021	2022	2023	2024	2025	2026
-- Intermediaries Leisure Online	<b>Data removed from sample</b>					
--- Intermediaries Leisure Air Online						
--- Intermediaries Leisure Car Rental Online						
--- Intermediaries Leisure Cruise Online						
--- Intermediaries Leisure Other Transport Online						
--- Intermediaries Leisure Lodging Online						
--- Intermediaries Leisure Package Holidays Online						
--- Intermediaries Leisure Other Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 70 Forecast Online Travel Sales to Residents: Value 2021-2026**

TWD million	2021	2022	2023	2024	2025	2026
- Online Travel Agencies Sales	<b>Data removed from sample</b>					
- Other Travel Intermediaries Online						

- Sales
- Airlines Direct Online Sales
- Other Transport Direct Online Sales
- Lodging Direct Online Sales
- Car Rental Direct Online Sales
- Other Direct Online Sales
- Online Travel Sales



Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

**Table 71 Forecast Total Mobile Travel Sales to Residents: Value 2021-2026**

TWD million

	2021	2022	2023	2024	2025	2026
Mobile Travel Sales	<b>Data removed from sample</b>					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources