

出國報告(出國類別：其他)

## 出席「第 24 屆世界航線發展論壇 (World Routes 2018)」報告書

服務機關：桃園國際機場股份有限公司

姓名職稱：楊雅筑 業務員

李思霈 業務員

派赴國家：中國大陸 廣東 廣州

出國期間：民國 107 年 9 月 14 日至 9 月 19 日

報告日期：民國 107 年 11 月 21 日

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## 公務出國報告提要

**出國目的：**出席第 24 屆世界航線發展論壇(World Routes 2018)

**主辦單位：**英國博聞集團 UBM、廣東省機場管理集團有限公司

**出國人員姓名：**楊雅筑、李思霈

**服務機關：**桃園國際機場股份有限公司

**職稱：**業務員、業務員

**出國類別：**5.其他(參加國際會議)

**出國期間：**民國 107 年 9 月 14 日至 9 月 19 日

**分類號：**目：

**關鍵字：**航線、航線發展論壇、航線發展策略、時間帶、Routes

**內容摘要：**

本公司於 107 年 9 月 14 日至 9 月 19 日期間出席由英國博聞集團(UBM)與廣東省機場管理集團有限公司(Guangdong Airport Authority)主辦之第 24 屆世界航線發展論壇(World Routes 2018)，此次會議舉辦地點為廣州，近幾屆世界航線發展論壇，本公司均派員與會，主要為與目標航空公司或國際機場公司代表洽談開設新航線或交流機場管理、建設及行銷等規劃。

世界航線發展論壇被譽為航空界的「奧運」及「世運」等級盛事，本屆論壇有來自全球 300 多家航空公司、700 多家機場管理機構，超過 3000 名代表出席本次活動。本公司與會人員針對參與會談的航空業者及機場管理單位，除介紹台灣觀光特色，並提供台灣航空市場及本機場最新運量數據，更新各項建設計畫進程，更針對不同航線、航點提供個案分析簡報，以做為航空公司評估開航桃園機場航線的決策輔助。

## 壹、目的

世界航線發展論壇係由英國 UBM Information 公司所舉辦之年度全球航空商業重要活動，本公司於 107 年 9 月 14 日至 9 月 19 日期間出席第 24 屆世界航線論壇(World Routes 2018)，並於論壇上設置攤位，同時提供現泡特調台灣特色茶飲、啤酒、一口酥及鳳梨酥等傳統點心與遠近馳名的現蒸鼎泰豐小籠包，希望讓來自全球各地的會議代表，除了品嚐台灣美食，也能藉此瞭解台灣文化。

此次會議舉辦地點為中國大陸廣州，看好未來亞太地區航空市場發展的強勁需求，該論壇邀集眾多航空公司、機場公司經營代表、觀光旅遊業者與相關領域專家學者與會，提供一個拓展航線與促進網絡的多方交流平台。

本公司近年航線發展策略，以發展成為東南亞-東北亞、東南亞-北美、大洋洲-歐洲間之樞紐地位為目標。在本次論壇上，以航線發展研究計畫顧問團隊所提出之航線市場發展分析為基礎，分別針對參與會談的航空公司，提供目標航點市場現況、兩地經貿往來連結、旅客組成分析、需求運量分析、營運成本及三年運量與獲利預測等資訊，以做為評估開發飛往桃園機場航線的決策輔助。

本公司在會談以及接受媒體採訪的過程中，主動更新桃園機場幾項重大計畫的最新進度，包含第二航廈南側與北側擴建預定於今年底完工、第三航廈先期工程「WC 滑行道遷建及雙向化工程」已經開始，而第三航廈主體預定於 2022 年完工。

隨著國人出國風氣盛行及往返歐、美與亞洲地區強勁的客運需求，我們亦致力於加強桃園機場在歐、美地區的航空網絡，在此次論壇中也相當積極地與美國及歐洲航空業者進行洽談。

與鄰近機場相比，本機場的航空相關收費費率較具有競爭力，我們希望藉此優勢，能說服外籍航空業者將桃園機場納入其未來拓展亞洲市場的選擇之一。近年越來越多國際機場祭出獎勵計畫以吸引航空公司開闢新航線，航空業者亦將此視為評估開航的決定條件之一。為使桃園機場更具競爭力，本公司自去年開始提

供為期一年的降落費 5 折優惠，適用對象為開闢新航點或使用非尖峰時段起降的航空公司，以及提供免費媒體曝光和首航活動贊助的行銷獎勵方案；另本公司亦參考航空公司的意見及各國際樞紐機場激勵方案內容，適時調整與檢討現行方案。

## NEWS

# Taoyuan relaxed on terminal delays

Completion date pushed back amid other initiatives to ease congestion at facility operating way above its design capacity

Taipei Taoyuan International airport says it is unfazed by the delays in the completion of its third terminal, which has been pushed back to 2022.

Speaking to FlightGlobal at the show on Sunday, the airport's executive of business planning and marketing Sophie Li explains that the delays were caused by the need for more time to work out budgets and confirm the design of the project.

Terminal 3 previously had a target completion date of 2020, with operations to commence in 2021. It is expected to cost NT\$39.6 billion (\$1.32 billion), and has a design ca-



The opening date has been changed as designs are considered

capacity of 45 million passengers annually with about 27 aircraft parking aprons.

Li says that Taoyuan has been consistently operating above its design capacity in the past several

years and has introduced incentives to ease congestion, especially during peak times.

These include introducing a 50% cut in landing fees when airlines connect Taoyuan airport to new destinations, as well as when they select non-peak-hour slots.

The airport has also completed the construction of a new taxiway that came into operation in August.

Meanwhile, Li says that expansion of Taoyuan Terminal 2's north and south wings is on track to be completed by the end of 2018.

Taoyuan airport handled 44.8 million passengers last year, well above its 32 million capacity. ■

▲FlightGlobal 於大會期間採訪桃園機場

## 貳、過程及會談紀要

### 一、論壇行程

Saturday 15 September

Various	Delegate Tours
12:00 – 15:00	Badge Collection Location: Shangri-La Hotel
17:00 – 19:00	Saturday Reception & Badge Collection Location: Shangri-La Hotel

Sunday 16 September

08:30 – 17:30	Registration and Diary Advice Open Location: China Import and Export Fair
08:30 – 20:00	Hosted Networking Stands open Location: Networking Village, Host Stand
09:00 – 09:30	Host Opening Ceremony Location: Host Stand, Hall 3:2
10:00 – 11:50	Face-to-Face Meetings Location: Airline Meeting Halls
10:10 – 17:40	Conference Programme Location: Keynote Arena
11:50 – 13:30	Networking Lunch Location: Networking Village
11:50 – 12:50	Exhibitor Networking Session Location: Networking Village
12:50 – 14:40	Face-to-Face Meetings Location: Airline Meeting Halls
14:40 – 15:20	Exhibitor Networking Session Location: Networking Village
14:50 – 15:10	Refreshment Break Location: Networking Village
15:20 – 17:40	Face-to-Face Meetings Location: Airline Meeting Halls
17:30 – 19:30	Welcome Reception Location: Host Stand, Hall 3:2

Monday 17 September

07:45 – 17:35	Registration and Diary Advice Open Location: China Import and Export Fair
07:45 – 18:30	Hosted Networking Stands Open Location: Networking Village
08:30 – 10:50	Face-to-Face Meetings Location: Airline Meeting Halls
09:40 - 17:35	Conference Programme Location: Keynote Arena
10:50 – 11:05	Refreshment Break Location: Networking Village
10:50 – 11:05	Exhibitor Networking Session Location: Networking Village
11:05 – 12:35	Face-to-Face Meetings Location: Airline Meeting Halls
12:35 – 14:00	Networking Lunch Location: Networking Village
12:35 – 13:40	Exhibitor Networking Session Location: Networking Village
13:40 – 14:40	Face-to-Face Meetings Location: Airline Meeting Halls
14:40 – 15:30	Fast Track Session Location: Airline Meeting Halls
15:30 – 15:45	Refreshment Break Location: Networking Village
15:30 – 15:45	Exhibitor Networking Session Location: Networking Village
15:45 – 17:35	Face-to-Face Meetings Location: Airline Meeting Halls
17:35 – 18:30	Exhibitor Networking Session Location: Networking Village
19:00 – 23:00	Networking Evening including World Routes Marketing Awards Location: China Import and Export Fair

Tuesday 18 September

07:45 – 17:40	Registration and Diary Advice Open Location: China Import and Export Fair
07:45 – 20:00	Hosted Networking Stands Open Location: Networking Village
08:30 – 10:50	Face-to-Face Meetings Location: Airline Meeting Halls
09:00 – 12:25	Conference Programme Location: Keynote Arena
10:50 – 11:05	Refreshment Break Location: Networking Village
10:50 – 11:05	Exhibitor Networking Session Location: Networking Village
11:05 – 12:25	Face-to-Face Meetings Location: Airline Meeting Halls
12:25 – 14:00	Networking Lunch hosted by World Routes 2019 Host Location: Networking Village
12:25 – 13:45	Exhibitor Networking Session Location: Networking Village
13:45 – 15:35	Face-to-Face Meetings Location: Airline Meeting Halls
15:35 – 15:50	Refreshment Break Location: Networking Village
15:35 – 15:50	Exhibitor Networking Session Location: Networking Village
15:50 – 17:40	Face-to-Face Meetings Location: Airline Meeting Halls
17:00 – 19:00	Farewell Reception hosted by World Routes 2019 Host Location: Keynote Arena - Hall 5:2
17:40 – 20:00	Exhibitor Networking Session Location: Networking Village
18:00 – 18:15	Handover Ceremony Location: Keynote Arena - Hall 5:2
20:00	Event Closes



## 二、本公司會談配對時間表



# Draft Copy

Taoyuan International Airport - Yachu Yalu  
PRC: ROU2289



Sunday 16 September		Monday 17 September		Tuesday 18 September	
10:00	1	08:30	1	08:30	1
10:30	2	09:00	2	09:00	2
11:00	3	09:30	3	09:30	3
11:30	4	10:00	4	10:00	4
11:50		10:30	5	10:30	5
12:50	5	10:50		10:50	
13:20	6	11:05	6	11:05	6
13:50	7	11:35	7	11:35	7
14:20	8	12:05	8	12:05	8
14:40		12:35	9	12:25	
15:20	9	13:40	10	13:45	9
15:50	10	14:10	11	14:15	10
16:20	11	14:40		14:45	11
16:50	12			15:15	12
17:20	13	15:30		15:35	
		15:45	12	15:50	13
		16:15	13	16:20	14
		16:45	14	16:50	15
		17:15	15	17:20	16
17:40		17:35		17:40	

Legend - Meeting Types  
■ Conference Session  
■ Chalet Meeting  
■ Stand Meeting

Meetings System Sponsored By:



## 三、展區配置及參展單位

本次論壇共邀集超過 300 間航空公司、700 間機場管理代表、130 多家政府及觀光機構，超過 3000 名航空專業人士參加。會議進行方式為機場公司及航空公司提出會談需求，再經由主辦單位配對會談時間，雙方可於會談桌或是攤位上進行 20 至 50 分鐘的一對一的面對面討論，本次會議共進行 13,000 場一對一會談。此外，現場參展單位主要來自廣東省機場管理集團、泰國機場公司、新加坡樟宜機場集團、韓國仁川機場、韓國機場公司、日本成田機場、馬來西亞機場集團、美國達拉斯機場、美國拉斯維加斯機場、美國芝加哥歐海爾機場、荷蘭史基浦機場、比利時布魯塞爾機場、英國曼徹斯特機場集團、澳洲阿德雷德機場、丹麥哥本哈根機等各國機場管理單位，日本觀光局、菲律賓觀光局、英國觀光局等

觀光官方管理單位，亦有民航運輸發展、航線網絡研究或航空數據資料庫之業者，例如 OAG、ASM、CAPA、Sabre、IATA、Rolls-Royce、AviaSolutions、Flightglobal 等出席與會。



✈ 論壇於廣州機場設置接待櫃台



✈ 論壇展場入口



✈ 論壇展場入口



✈ 論壇會場外展示



#### 四、特色機場主題展區



✈ 主辦單位展區：大陸廣州機場管理局



✈ 美國達拉斯機場



✈ 美國拉斯維加斯機場



✈ 新加坡樟宜機場



✈ 新加坡樟宜機場



✈ 中國大陸青島機場



✈ 挪威奧斯陸機場



✈ 韓國仁川機場





✈ 英國曼徹斯特機場集團



✈ 捷克布拉格機場



✈ 瑞典機場集團



✈ 法國巴黎機場集團



✈ 波多黎各聖胡安機場



✈ 俄羅斯聖彼得堡機場

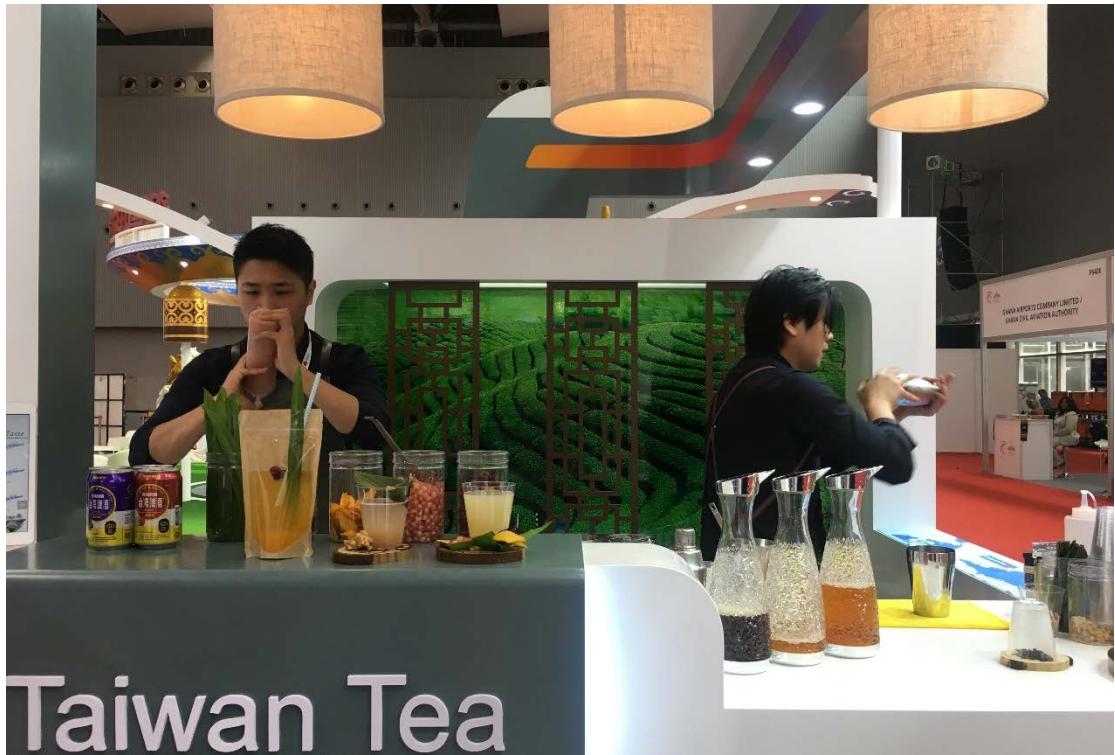
五、桃園機場攤位展區



✈️ 桃園機場攤位



✈️ 桃園機場攤位



✈ 本公司於攤位提供現泡台灣特色茶飲與啤酒



✈ 本公司於攤位提供現泡台灣特色茶飲與啤酒



✈ 本公司與鼎泰豐合作於攤位提供現蒸小籠包與蒸餃



✈ 本公司與鼎泰豐合作於攤位提供現蒸小籠包與蒸餃

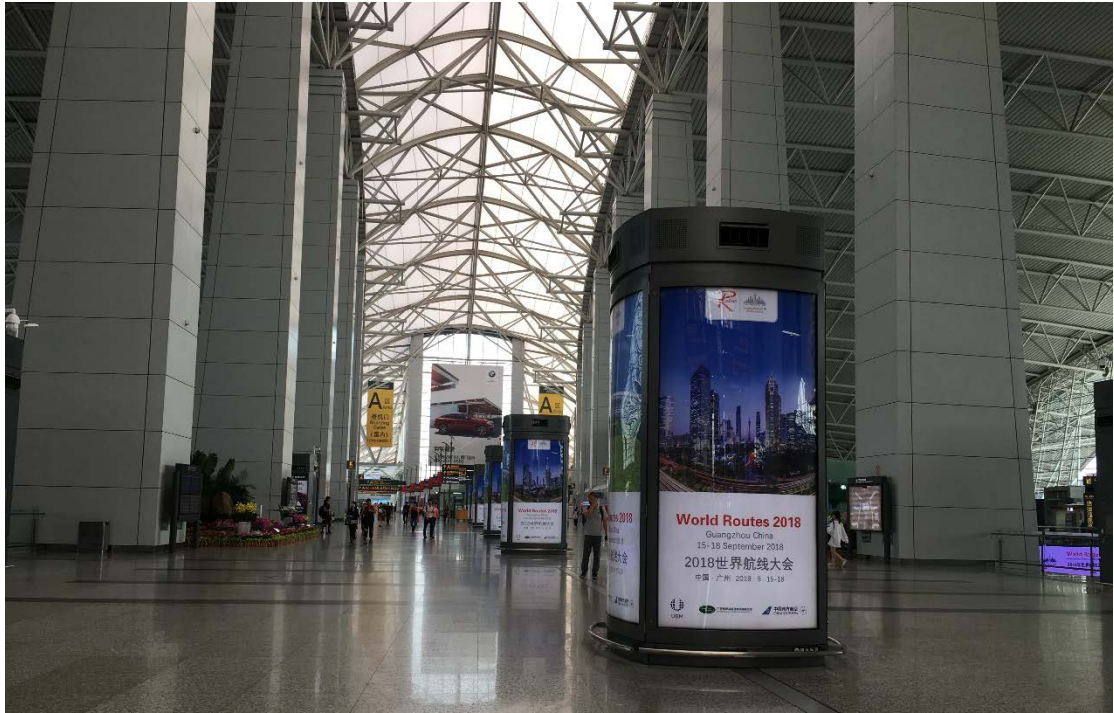


✈ 本公司與觀光局喔熊合作宣傳

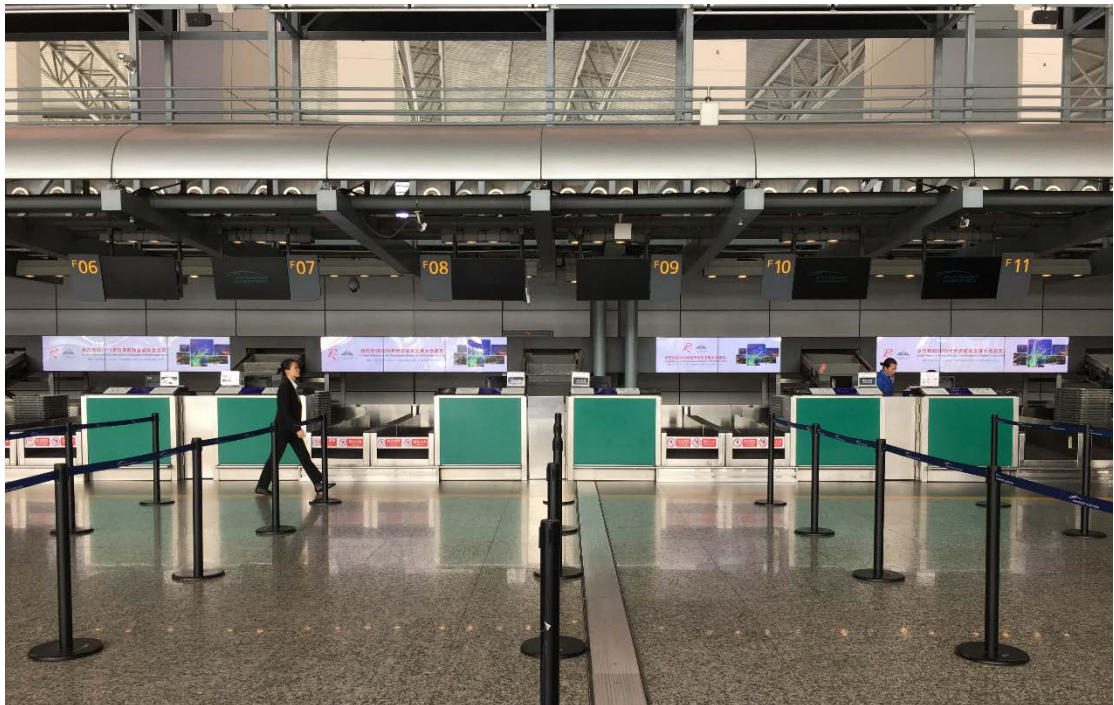


✈ 本公司與會人員和其他與會代表合影

## 六、廣州白雲機場



✈️ 出境大廳

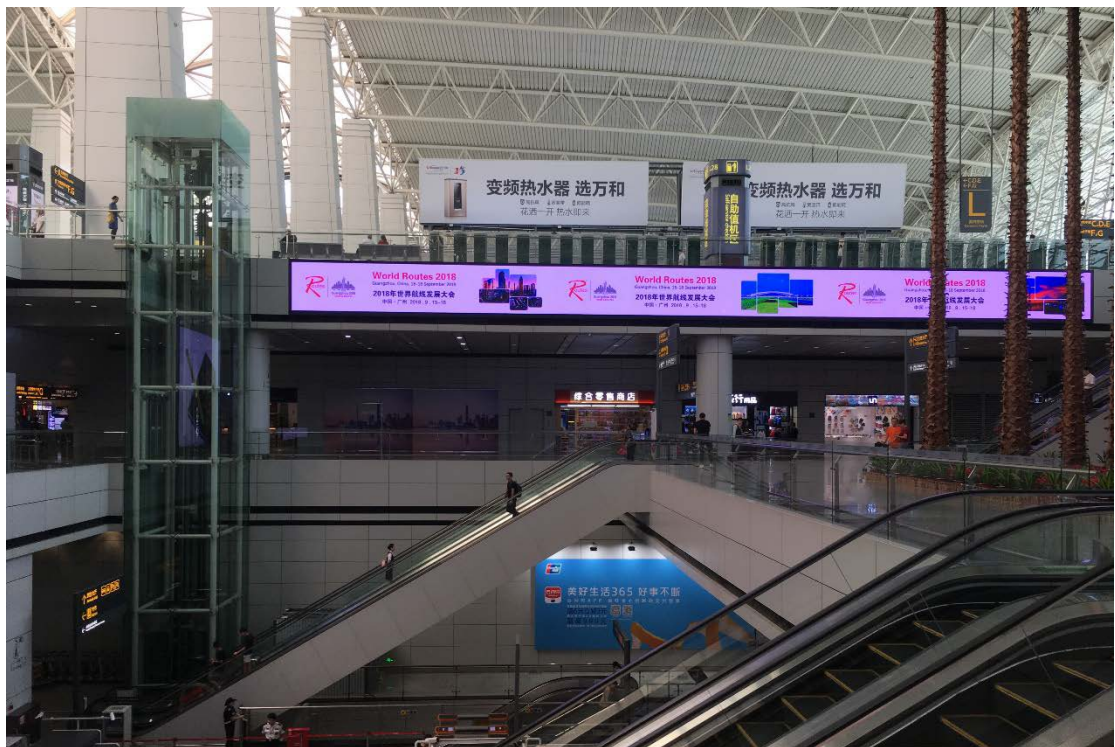


✈️ 劃位櫃台





✈ 自助報到機專區



✈ 隨處可見世界航線發展論壇廣告露出



✈ 另外規劃之航班延誤服務區塊



✈ 機場內設立電影院

## 七、會談紀要

本公司與會人員針對參與會談的航空業者，除介紹臺灣與各目標航點城市或國家間經濟貿易往來現況、觀光特色和強調來台旅客及國民出國旅遊逐年成長趨勢外，並提供桃園機場各區域及航空公司客運量統計、機場營運現況及長期規劃發展，更針對不同航點或航空公司的開航潛力提供個案分析簡報。關於桃園機場現況及未來發展，簡要介紹如下：

(1) 隨著近年來桃園機場各項重大計畫陸續展開，藉著參與論壇的機會，我們主動說明機場最新狀況及近期規畫，包括第二航廈南北兩側擴建計劃預計今年年底前全部完工，並於第二航廈完成行李自助託運系統(Bag-Drop)建置；第三航廈先期工程「WC 滑行道遷建及雙向化工程」已經開始，而第三航廈主體則預定於 2022 年完工。

(2) 在旅客總運量方面，2017 年桃園機場的旅客總人次超過 4480 萬，成長率為 6.11%。整體運量由東南亞區域 16.3%、北美地區 13.8%及歐洲中東地區 30.5%的成長率帶動。在新闢航點及新航空公司進駐方面，今年陸續有中華航空開航桃園-安大略，法國航空開航桃園-巴黎，長榮航空開航桃園-清邁，菲亞洲航空開航桃園-克拉克，台灣虎航新增桃園-佐賀，泰亞洲航空開航桃園-清邁，星悅航空開闢桃園-北九州，及 11 月紐西蘭航空將開闢桃園-奧克蘭和 12 月汶萊皇家航空將開闢桃園-斯里巴加灣市。

此次與本公司進行會談的航空公司有 26 家、機場管理單位 5 家，分別為美國航空、西伯利亞航空、荷蘭航空、中星航空、波蘭航空、瑞麗航空、英國航空、挪威航空、柬埔寨航空、BB 航空、春秋航空、瑞士航空、漢莎航空、維珍澳洲航空、亞洲航空集團、泰亞洲航空、卡達航空、Vistara 航空、漢莎貨運、捷星航空、越南航空、芬蘭航空、昆明航空、宿霧航空、曼谷航空、達拉斯福沃斯機場、樟宜機場、仁川機場、名古屋機場、仙台機場。

本次與航空業者及機場管理代表一對一會談重點，大致歸納如下：

- (1)臺灣觀光旅遊介紹、來台旅客來源與目的分析及國人出國旅遊成長趨勢
- (2)桃園機場近五年運量數據及各區域運量成長
- (3)分析目標航空市場並提供 3 年運量及收益預測分析
- (4)提供桃園機場最新營運資訊與近期及未來發展規劃
- (5)與會談航空公司及機場代表交流航空產業訊息，如機隊規劃、航線布局、未來發展趨勢及機場重大建設計劃等。

與個別航空公司或機場代表會談紀錄因涉及各公司業務規劃，無法列入本報告中，已於本公司內部另行陳報。

#### 會談照片

會談對象	照片
美國航空	

英國航空



挪威航空



越南航空



捷星航空



漢莎航空集團



Vistara



荷蘭航空



芬蘭航空



宿霧航空



昆明航空



BB Airways



名古屋機場





## 參、心得與建議

### 一、會談成果

本次會談與 26 家來自全球各地之航空公司及 5 家國際機場代表進行一對一會談。目前已營運桃園機場航線的航空公司，部分表態計劃增開新航點或是增班；尚未開航的航空公司對於臺灣市場則表達高度興趣，將本機場納入其評估名單中，另有些尚未進駐桃園機場的航空公司，已將本機場列入其近期規畫開航清單中。

### 二、議題彙整

經歸納會談紀錄內容，各航空公司主要向本公司提出下列四大議題：航權航約類、運量預測類、有無激勵方案補助航空公司開航以及本機場時間帶容量議題。

(1) 航權航約類：歐洲航空業者主要受限於俄羅斯領空飛渡權的次數限制，導致其在亞洲區域的發展備受侷限；另外台灣目前與部份歐洲地區國家尚未簽屬航約，或所簽屬之航約有航點、航空公司及航班數量之限制，本公司將彙整航空公司提出之內容並於會後轉提交民航局，轉請民航局適度回應或由本公司回覆。

(2) 市場運量預測：本公司委託國際航空專業顧問團隊，利用 QSI 模型及針對航空公司可使用機型，模擬及預測各目標航線 3 年客運量及獲利數字，提供航空公司內部評估開航使用。

(3) 激勵方案：本公司目前提供之方案分為兩類，第一類為新航空業者或新航線之行銷露出及媒體宣傳補助；第二類為桃園機場新航線之航班降落費或空橋使用費減免補助，補助期間為期一年。為提升國際競爭力，並吸引國際航空公司開航桃園機場或鼓勵國籍航空公司開闢新航點，將參考國際標竿機場獎勵計畫內容，定期調整方案內容，以期達到最大效益。

(4) 時間帶容量：目前桃園機場尖峰時段的时间帶多已達上限，為有效紓緩尖峰時段航廈設施容量不足問題，本公司鼓勵航空業者使用紅眼時段，並提供降落費

折扣優惠。

### 三、建議事項

除了持續透過各市場發展趨勢及運量分析，針對各具有發展潛力之未直飛航線提出具體商業個案之外，應持續與各國際航空業者建立及維持聯繫管道順暢，留意其機隊規劃、近期航網布局及營運狀況，且持續更新本機場重大計畫進度，以利未來開發新航線機會。

為強化桃園機場航線網絡多元性，進而鞏固桃園機場之東亞樞紐地位，除了吸引外籍航空公司來台開航外，亦將適時協助國籍航空公司進行各區域航網規劃，本公司將持續提供國籍航空公司開闢新航線所需之資料，以強化桃園機場的航線網絡，進而提供旅客更加便捷且綿密的航網選擇。

另為提供航空公司開闢更多新航點服務之誘因，及降低開航成本，建議本公司現施行之激勵方案與行銷贊助內容，可參考各國際標竿機場及鄰近機場作法，並將航空公司意見納入考量，視機場營運情況進行檢討與調整。

**肆、附錄：商業案例簡報(美國航空-「達拉斯-桃園」及挪威航空-「倫敦蓋威克-桃園」)檢附本屆會議主要設定之目標航線簡報。**



## A Unique Opportunity to Serve Taipei from Dallas

World Routes 2018

# Contents

Summary of Route Forecast DFW-TPE	4
Why Taiwan?	6
Links Between Taipei and Dallas	9
DFW-TPE Market Background	12
DFW-TPE Forecast	17
Taoyuan International Airport	23



# Route Opportunity – Taipei

American is a leading global airline that is well placed to serve the Taipei market

- TPE is ideally located as a **transfer hub for an American** – Dallas service to **Asia**
  - Substantial indirect demand from Taipei beyond Dallas – to **USA 415,000**
  - Substantial indirect demand from Dallas beyond Taipei – to **South East Asia 117,600**
- **High volume** and **premium market** between Taipei and USA
- **561,000 Americans** visit Taiwan annually and **575,000 Taiwanese** visit US
- Established and strong **Dallas – Taiwan links**
  - Taiwan is Dallas's **#5** largest trade country in Asia
- US is Taiwan's **#1** foreign investor and **#2** trading partner
- **28,000 Taiwanese** born citizens in **Texas**
- Both Dallas and Taipei are major **Tech Cities**
- **TPE Award winning airport** customer service and range of facilities



# Opportunity for American Airlines

## Summary of Route Forecast



Connecting market  
over Taipei

**425,150**

Taipei

Point to point market

**23,400**

Dallas

Connecting market  
over Dallas

**1,130,420**

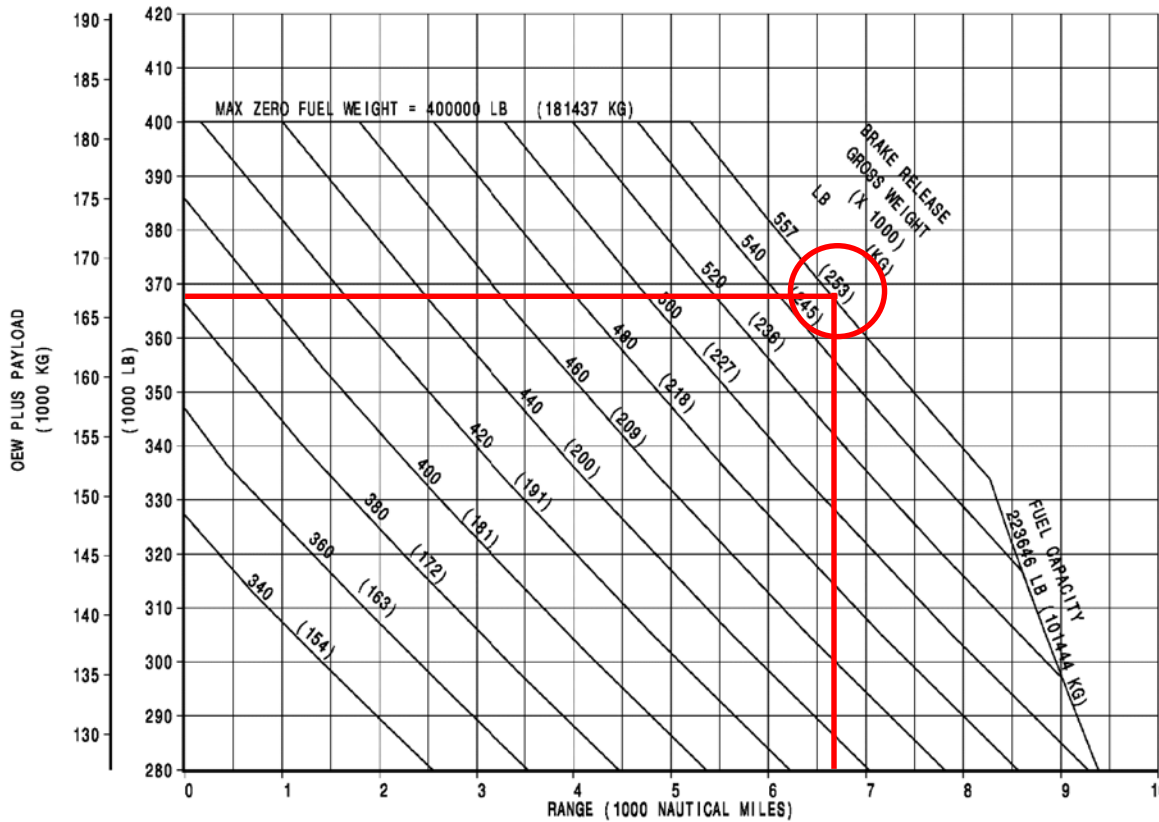
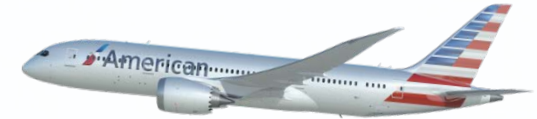
Schedule: B787-9

Sector	Dep. Time	Arr. Time	Op. Days	Aircraft	Seats	Annual Seats	Annual Pax	Seat Factor
DFW-TPE	10:30	14:55	123456	B789	285	177,840	143,006	80.4%
TPE-DFW	17:05	18:30	234567	B789	285			

Note: AviaSolutions analysis. Source for aircraft configuration is American Airlines' website

# B787-9 Performance

B787-9 range allows a direct connection between DFW and TPE



American Airlines B787-9 has sufficient range to serve Dallas-Taipei with **full passenger and baggage payload** plus 6.8 tonnes of cargo

<b>Max Design Zero Fuel Weight</b> <i>(to reach distance of 6.7 thousand nautical miles)</i>	<b>167,000 kg</b>
<b>Operating Empty Weight</b>	128,850 kg
<b>Passengers + Baggage</b> <i>(110kg per passenger)</i>	31,350 kg
<b>Cargo</b> <i>(maximum per sector)</i>	6,800 kg



# Why Taiwan?

## Economy, Trade, Tourism



# Market Fundamentals

## Established Business and Tourism Market for American to Serve

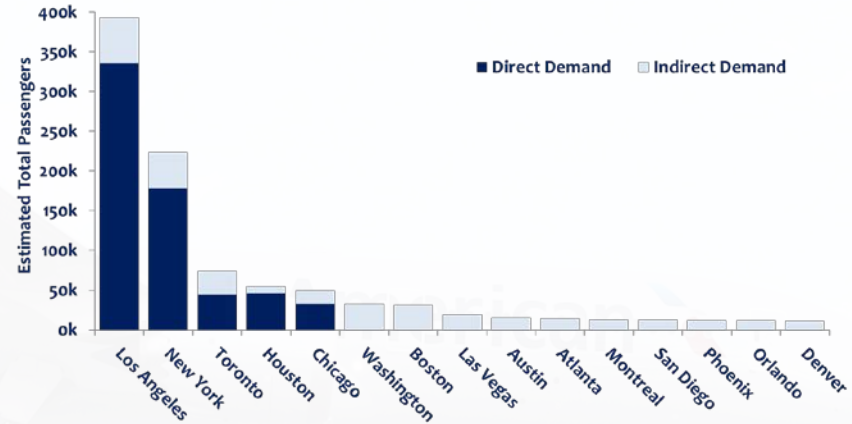
### Demand and Trends

- **Sizeable connecting demand** beyond DFW  
USA: **415,000** Other: **117,600**
- **High volume** and **premium market** between Taipei and North America
- Relatively high average one-way net business fares at over **\$1,301**
- Strong fit with **AA premium customers**
- **561k** US visitors to Taiwan in 2017 (+7.2% YoY); Taiwan's largest market outside Asia

### Strong Demand to North America

Top 15 City Pair Markets From Taipei Beyond Dallas

Source: Sabre MI 2017, AviaSolutions Analysis

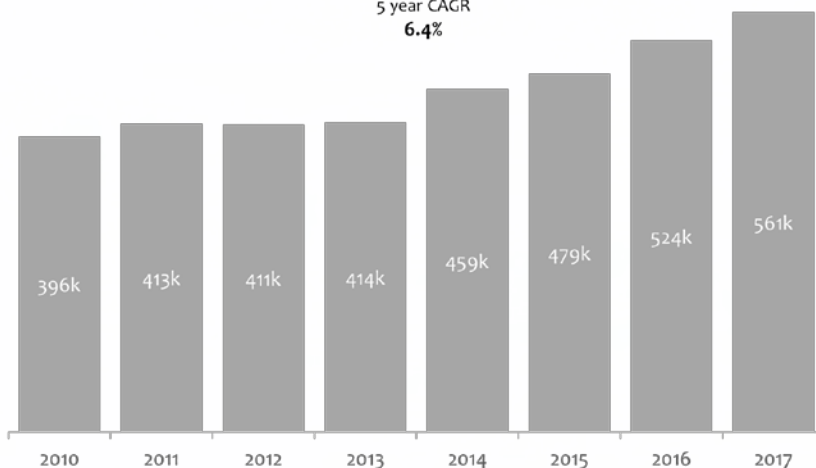


### Increasingly Popular Tourist Destination

US Residents Visits to Taiwan

Source: Tourism Bureau MOTC

5 year CAGR  
6.4%



### Established US-Taiwan Links

- Taiwan is Dallas's **#5** largest trade country – **US\$3.2bn Dallas Metro-Taiwan** two-way trade in goods
- **9,200** Taiwanese born citizens in Dallas Metro and **28,000** in Texas State
- US is Taiwan's **#1** foreign investor and **#2** trading partner
- **US\$85bn** US-Taiwan two-way trade in 2016 (**+40%** YoY)
- Many **US businesses** have activities in Taiwan
- Taiwan is one of only seven economies in the Asia Pacific region to enjoy **visa free travel to the US**

# Taiwan Ranks Highly as a Leading Global Destination

Growing popularity with **US** visitors (+6.4% CAGR last 5 years)



**Taipei City wins Global Traveler award for  
'Best Leisure Destination in Asia'**

*(Global Traveller Magazine 2018)*

**Top 10 Up and Coming Destination**

*Booking.com (2018)*

**#10 Asia Pacific City – Taiwan, MasterCard  
Index of Global Destination Cities (2017)**

**#1 World's Best Food**

*CNN Facebook Fan page (2015)*

**#6 Emerging Tourist Destination**

*Skyscanner global destination rankings (2016)*

**#5 Cycle Route Worldwide – Sun Moon Lake**

*One of the world's most beautiful cycle paths, CNN (2017)*

**One of the Best Tourism Destinations**

*Lonely Planet global rankings (2015)*



# Links Between Taipei and Dallas

# Established Links With US

Taiwan and US enjoy frequent and close exchange in trade and investment, technology, culture, tourism and education

Established business and tourism market for American to serve

**Visa-free travel** between Taiwan and USA (on both sides)

**Dallas-Taipei Sister Cities Agreement** signed in 1996 to connect the two societies on a local level

**561,000 Americans** visited Taiwan in 2017 (+9% YoY)  
**575,000 Taiwanese** visited US in 2017 (+10% YoY)

**358,000** Taiwanese born citizens reside in the US; (2010 Census, Migration Policy Institute)

**9,200** US citizens live in Taiwan

**20,000** Taiwanese students are studying in the US (the leading destination) generating **\$700m** for the US economy



Taiwanese and Taiwan affiliated company **investments** have supported more than **97,122 jobs in the United States**

Taiwan's exports to US reached **\$42.5Bn** as of 2017

US is Taiwan's **#2 foreign investor** worldwide at **\$25.7Bn** as of 2017

US is Taiwan's **#2 trading partner**

Taiwan is **US's #10 trading partner** and #7 largest export market for American agricultural products

Two way trade reached **US\$68Bn** in 2017

# Taiwan – Texas Economic Relations are Strong

42,993 jobs in Texas and 322,728 in the US are supported by Taiwan (2017)

Texas **imports** from Taiwan reached **US\$2.8Bn** in 2017

7.3% growth vs 2016

Texas **exports** to Taiwan reached **US\$4.7Bn** in 2017

9.4% growth vs 2016

Taiwan is **#19** imports partner for Texas and **#7** within Asia

(2017)

Taiwan is **#9** exports partner for Texas and **#5** within Asia

(2017)

Taiwan Supports an Estimated

**322,728**  
**JOBS**

in the United States



**107,208 JOBS**

Supported by investment from Taiwan affiliated companies



**136,034 JOBS**

Supported by exports of U.S. goods to Taiwan



**79,486 JOBS**

Supported by exports of U.S. services to Taiwan



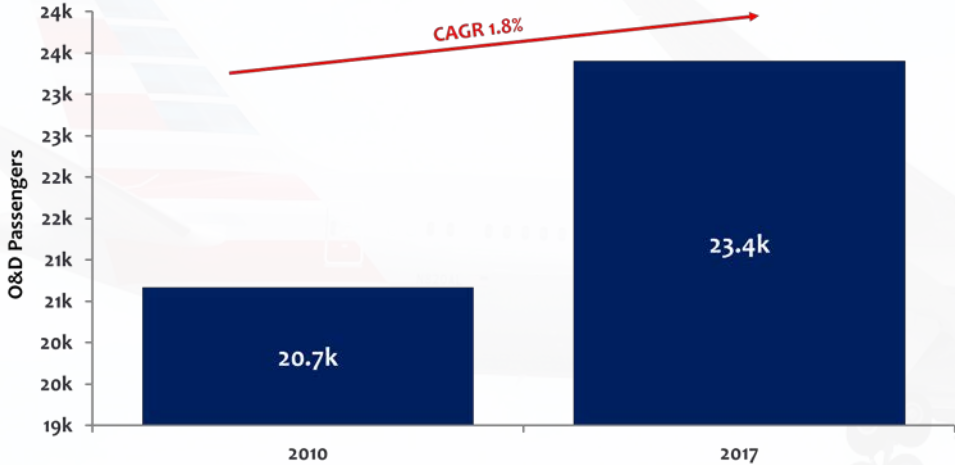
**DFW-TPE**  
**Market Background**

# Market Background

## Point to Point Traffic

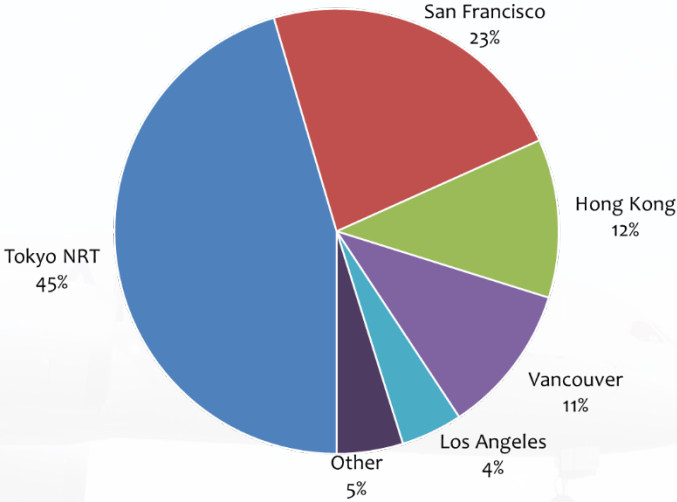
Dallas - Taipei Point to Point Indirect Traffic 2010-2017

Source: Sabre MI 2010-2017, AviaSolutions analysis



Major Connecting Points for Demand Between Dallas and Taipei

Source: Sabre MI 2017, AviaSolutions analysis



Indirect traffic increased at **1.8%** CAGR between 2010-2017

**23.4k** passengers flew indirectly between Dallas and Taipei (Sabre MI data 2017)

Several hubs share indirect traffic connecting Dallas with Taipei

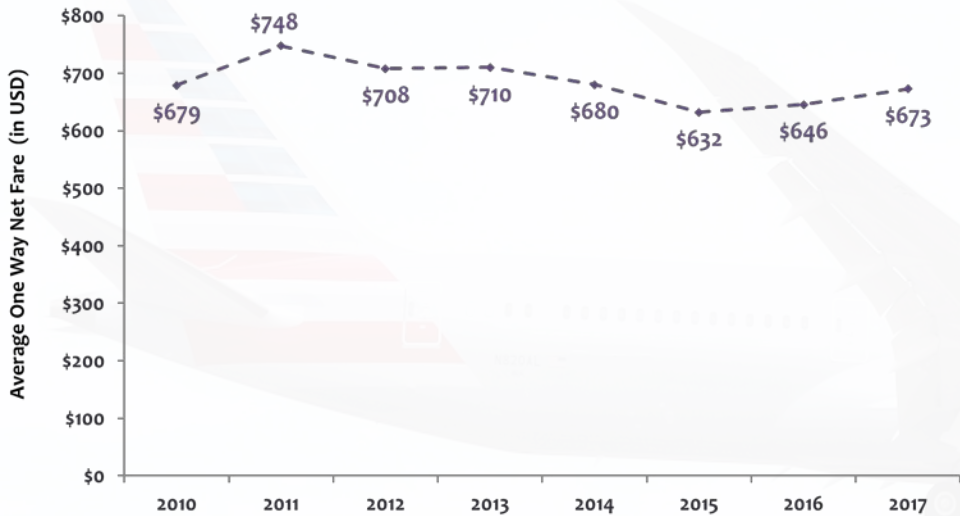
**Tokyo (45%)** provided the most connections followed by **San Francisco (23%)** and **Hong Kong (12%)**

# Market Background

## Point to Point Fares

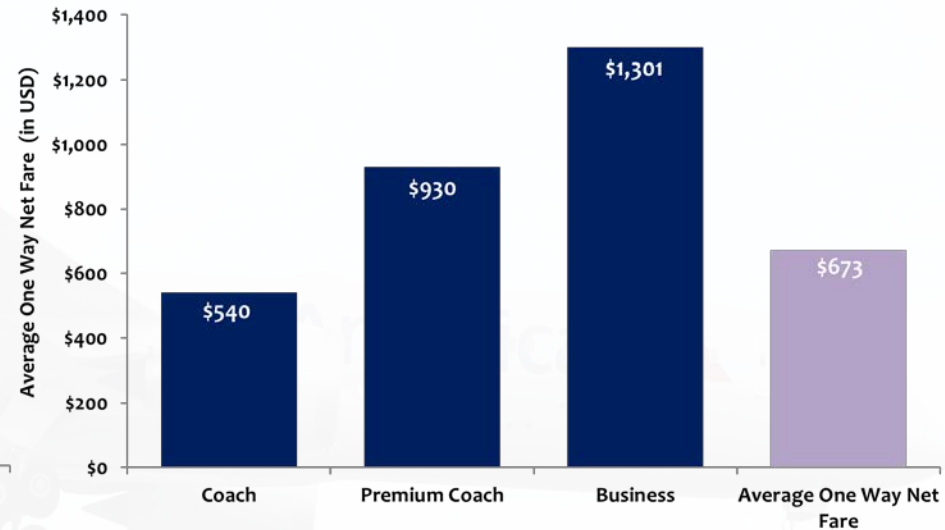
Dallas - Taipei Point to Point Fares 2010 - 2017

Source: Sabre MI 2010-2017, AviaSolutions analysis



Dallas - Taipei Point to Point Fares by Class

Source: Sabre MI 2017, AviaSolutions analysis



Average O&D one way net fares between Dallas and Taipei are stable; **\$673** in 2017

(Sabre MI data 2017)

Increased competition over hubs with lower fares has led to increased demand

Average O&D one way net fares between Dallas and Taipei show low fares in Coach (**\$540**) and moderate fares in Business (**\$1,301**)

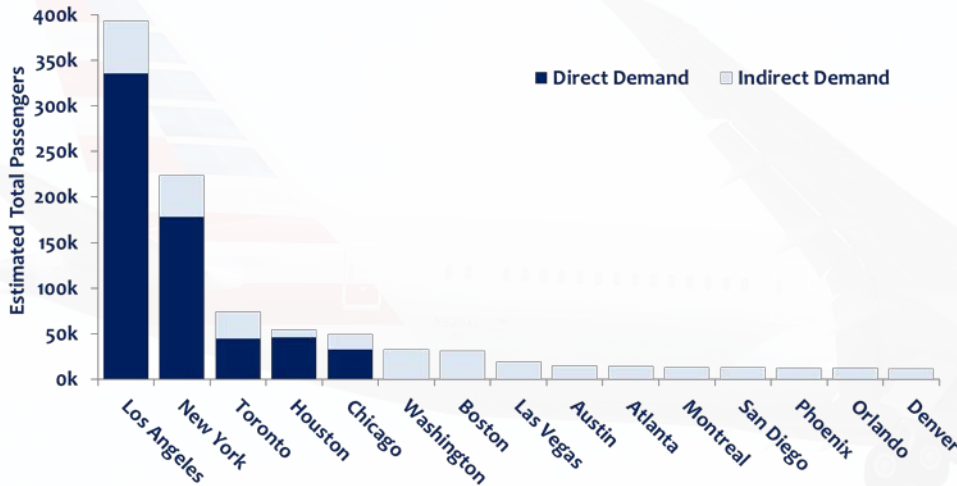


# Market Background

## Connecting Traffic from Taipei beyond Dallas

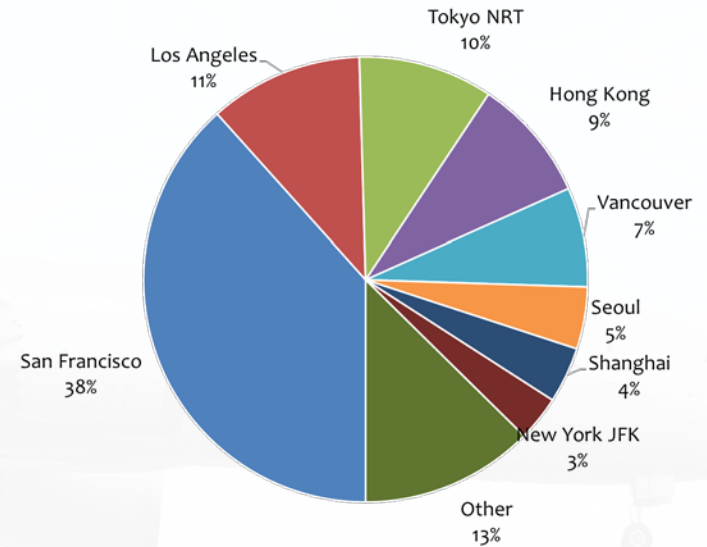
### Top 15 City Pair Markets From Taipei Beyond Dallas

Source: Sabre MI 2017, AviaSolutions Analysis



### Taipei to Cities beyond Dallas - Major Connecting Points

Source: Sabre MI 2017, AviaSolutions analysis



The largest markets from Taipei beyond Dallas are **Los Angeles, New York and Toronto**

Several hubs share indirect traffic connecting Taipei with destinations beyond Dallas

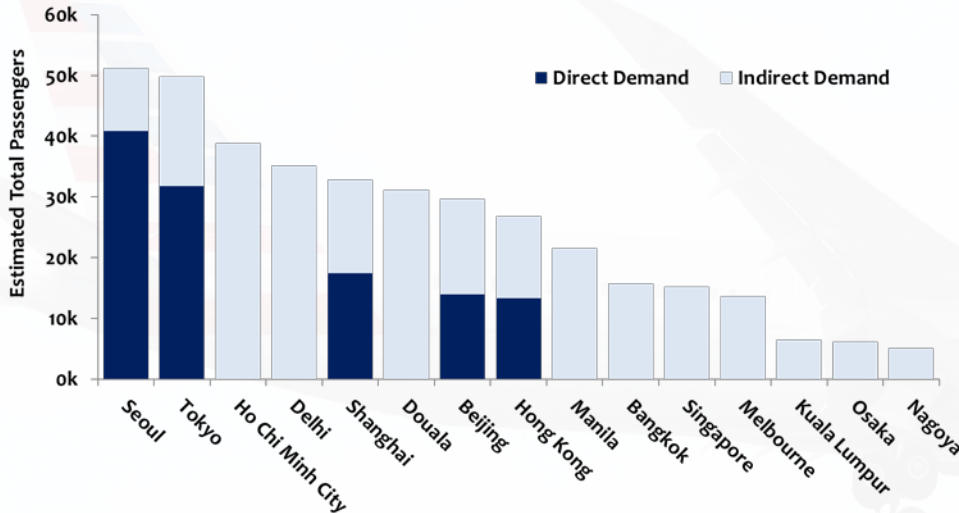
**San Francisco (38%)** is the main connecting point followed by **Los Angeles (11%)** and **Tokyo NRT (10%)**

# Market Background

## Connecting Traffic from Dallas beyond Taipei

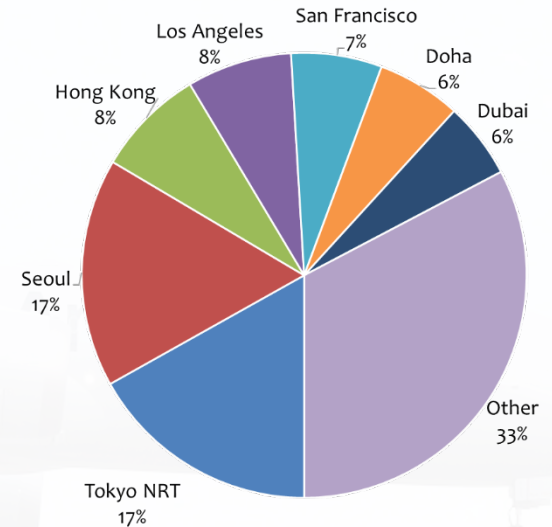
Top 15 City Pair Markets From Dallas beyond Taipei

Source: Sabre MI 2017, AviaSolutions analysis



Dallas to Cities beyond Taipei - Major Connecting Points

Source: Sabre MI 2017, AviaSolutions analysis



The largest markets from Dallas beyond Taipei are **Seoul**, **Tokyo** and **Ho Chi Minh City**

Several hubs share indirect traffic connecting Dallas with destinations beyond Taipei

**Tokyo NRT (17%)** is the main connecting point followed by **Seoul (17%)** and **Hong Kong (8%)**

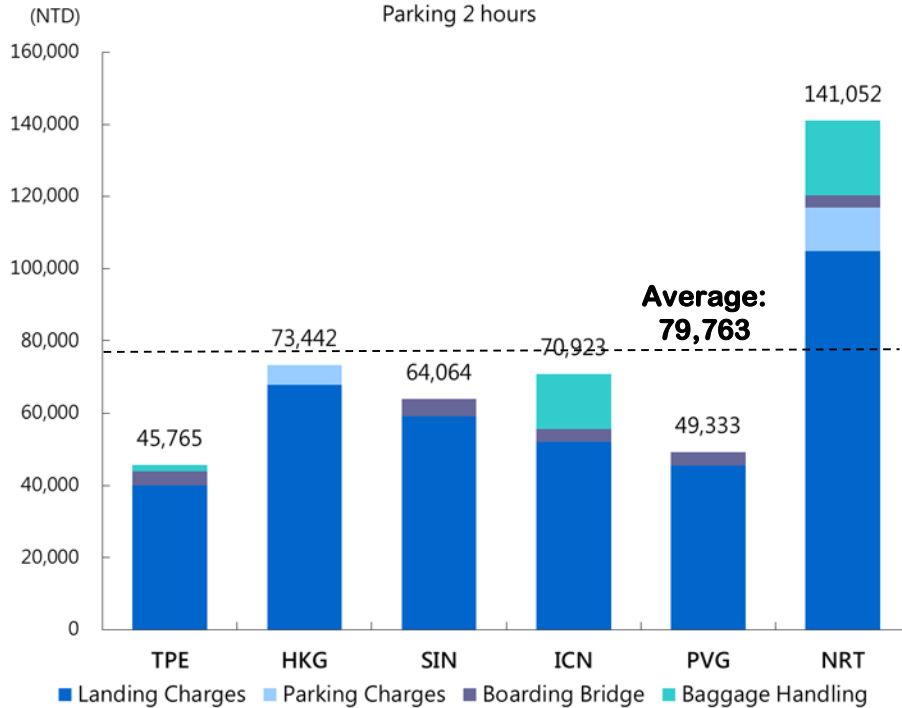


# Taoyuan International Airport

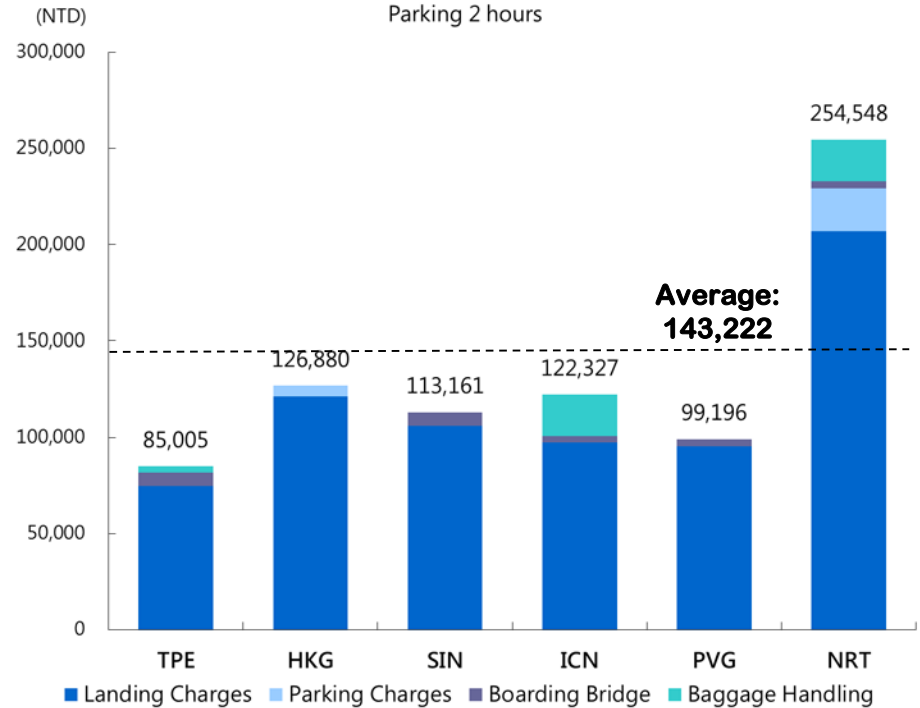
# TPE Airport Charges

TPE Airport Charges do not exceed average charges of main East Asian airports

**A330-300 (PAX 295)**  
Parking 2 hours



**B747-400 (PAX 416)**  
Parking 2 hours



# TPE Current Incentive Scheme

Program aims to invite air carriers to operate and develop new routes at TTIA.

Applicable flights:

- **Scheduled direct flights**

Eligibility:

- **New route for Taoyuan Airport (not to have been opened for the last year before application date)**
- **Flights must inaugurate within 3 months after TTIA has approved the application**

Incentive Scheme	Details
Landing Fee	Qualified flights have landing fee <b>50% off.</b>
Boarding Bridge Charge	Qualified flights arriving and departing between 0:00~04:59 a.m. (same day) and departing in 2 hours have boarding bridge charge <b>50% off.</b>

TPE Incentive Scheme application deadline is **December 31, 2018.**  
All applications must be completed before the deadline.

# TPE Marketing Support Program

## TTIA New Airlines and Routes Promotion Incentive Programs

Program aims to invite new air carriers to operate and develop new routes at TTIA

Candidates categories:


**Category 1** - New air carrier entrant, operating regular flights from TTIA

**Category 2** - Newly opened regular direct route to TTIA

**Category 1** should be air carriers that have not operated on any route at TPE.

**Category 2** routes should not have been opened for the last two years before application.

Qualified candidates will obtain one-time FREE marketing exposure of TTIA New Airlines and Routes Marketing Support Program.

TTIA New Airlines and Routes - Promotion Incentives Program				
Media	Content	Times	Comments	
TPE Social Media	Facebook post	Chinese and English content + pictures	Once	1. Airlines should provide TIAC with marketing content upon application.
	Instagram post	English content + pictures	Once	2. TIAC reserves the right to edit any submitted material.
	Twitter post	English content (less than 140 words) + pictures	Once	
Other Channels (one option only)	Option I	Print media	Twice	1. Select one option only
		Internet media	Once	2. All the media items including print media, internet media and outdoor media are selected from the attached list.
	Option II	Print media	Once	3. Airline logo and city image of the new route should be submitted to TIAC in AI format for TIAC to complete the artwork production and arrange media exposures.
		Internet media	Once	4. Airlines should provide TIAC with words, pictures and website link for internet media exposure.
		Outdoor media	Once	5. No specified position and date should be appointed.
	Option III	Print media	Once	6. TIAC reserves the right to revise the submitted materials.
		Internet media	Twice	
	Option IV	Internet media	Triple	
		Internet media	Twice	
Option V	Internet media	Twice		
	Outdoor media	Once		

Candidates are required to submit a copy of Air Route Certificate issued by CAA and filled application form to TIAC no later than 45 days before inauguration.

# TPE Incentive Scheme & Marketing Support Program

## Application Procedure



Program expires on **31 December 2018**.

TIAC will revise the budget execution and effectiveness to extend program.

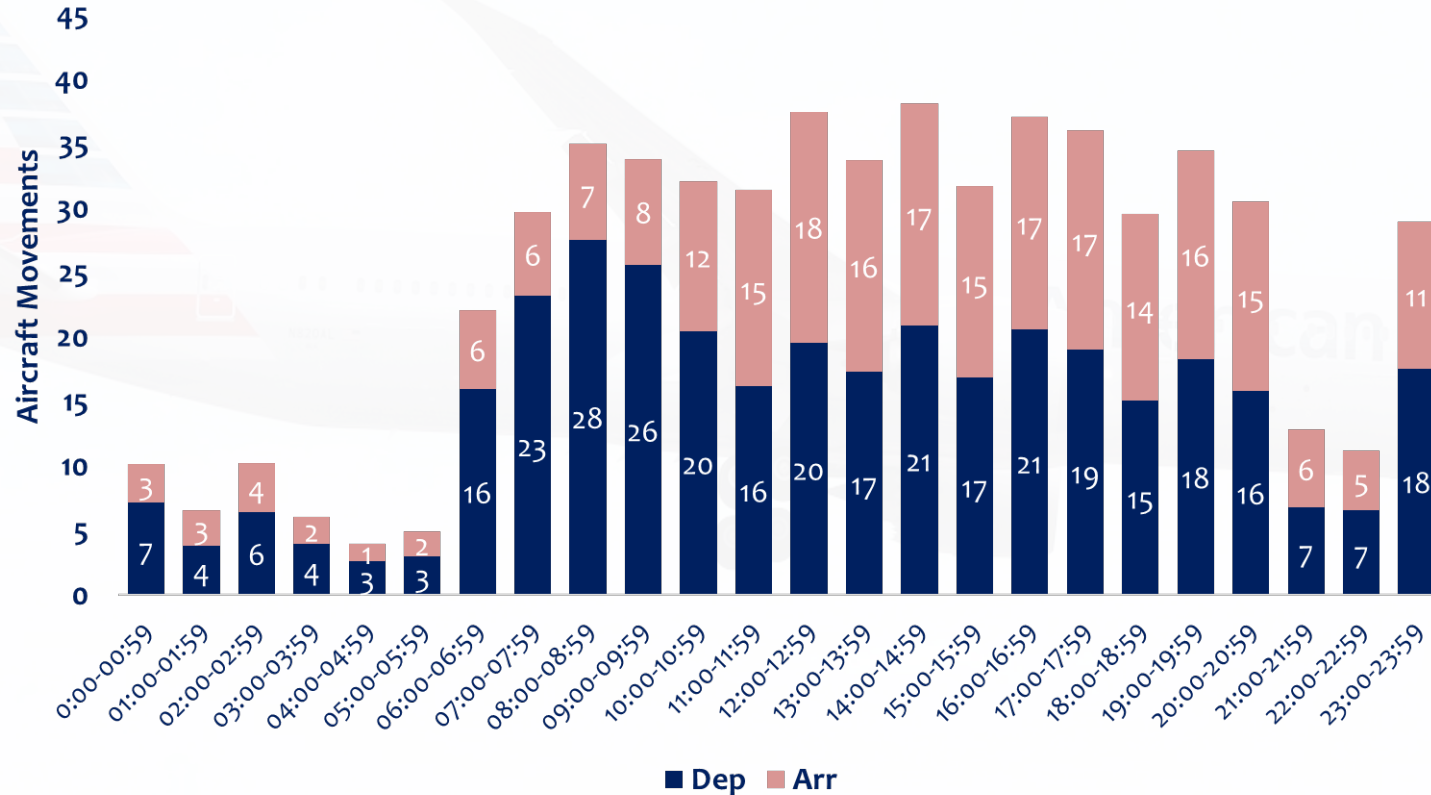
Program takes effect after official announcement.

TIAC has the right to extend, revise program.

# TPE Slots Usage

## TPE Aircraft Movements - Daily Average

Source: Taoyuan International Airport, June 2018



Peak hour **12:00-13:00, 14:00-15:00 and 16:00-17:00**

Capacity of **50** movements per hour and **90** movements in **2** consecutive hours



# Steps to Commence Operations at Taipei

## Decision to serve



Taoyuan  
International Airport  
桃園國際機場

*Contact CAA for  
official permission  
to operate at TPE*

## Application for

- Air Route Certificate
- Application for Station Manager Office, if applicable

*Discuss  
operations  
with TIAC*

## Confirmation on

- Terminal choice
- Check-in counter arrangement
- Boarding gate arrangement
- IT & communication system
- Office rent agreement
- Other administration issues

## Contact Person

Mr. Tom Chen

TEL: +886-3-273-5333

FAX: +886-3-273-5322

Email: tomchen@mail.taoyuan-airport.com



Taoyuan  
International Airport  
桃園國際機場



## Contact

**Mrs Sophie Li**

Business Planning & Marketing Department

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No.9, Hangzhan S. Rd., Dayuan Dist.,

Taoyuan City 33758, Taiwan R.O.C

Tel: +886-3-2735504

Email: [sophieli@mail.taoyuan-airport.com](mailto:sophieli@mail.taoyuan-airport.com)



## Contact

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Email: [emilycyang@mail.taoyuan-airport.com](mailto:emilycyang@mail.taoyuan-airport.com)





## ***A Unique Opportunity to Serve Taipei from London Gatwick***

World Routes 2018

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Summary of Route Forecast LGW-TPE	4
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Links Between London and Taipei	9
LGW-TPE Market Background	11
LGW-TPE Forecast	15
Taoyuan International Airport	20



# Route Opportunity – London-Taipei

**Norwegian** is a global **long haul low cost leisure airline** that is well placed to serve the Taipei leisure market

- LGW is a key destination and **transfer hub for Europe bound leisure traffic from SE/NE Asia**
  - Substantial demand from Taipei beyond London (on Norwegian network)  
*to Europe 97,300; to USA & Argentina 324,000*
- **High volume leisure market** between Taipei and Europe
- **65,000** UK residents visit Taiwan annually (2017); growing rapidly at **8.3%** per year
- **51,000** Taiwan born residents live in UK, nearly half of which in London & South East (2017)
- Market supported by strong and established **trade, investment and education links**
- UK is Taiwan's **#3 largest** trading partner in Europe
- UK is **#1 destination** for Taiwan investment in Europe
- London and Taipei have **shared interests** as global **leisure destinations** and **Tech cities**
- **TPE Award winning airport** customer service and range of facilities

# Opportunity for Norwegian

## Summary of Route Forecast



Connecting market potential  
over London Gatwick

**421,600**

London Gatwick

Point to point market

**140,000**

Schedule: B787-9

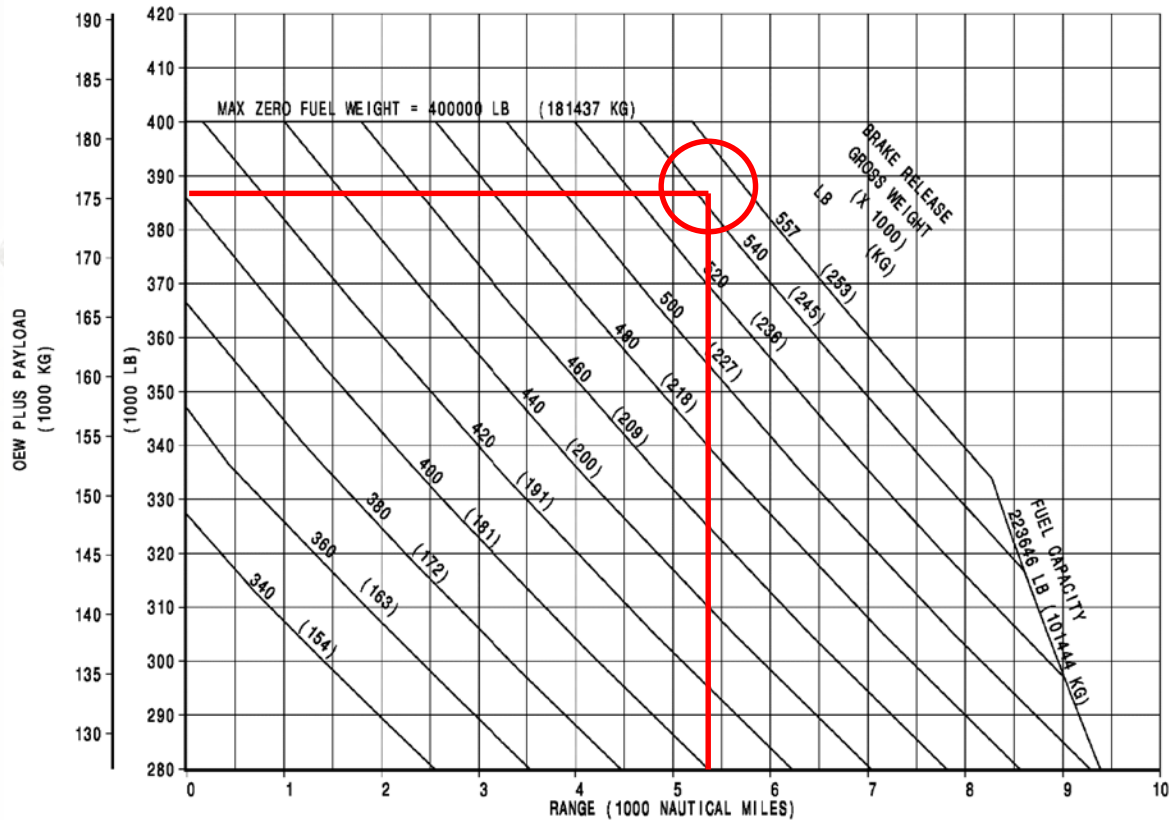
Sector	Dep. Time	Arr. Time	Op. Days	Aircraft	Seats	Annual Seats	Annual Pax	Seat Factor
LGW-TPE	10:00	05:50	1 5	B787-9	344	71,552	55,040	76.9%
TPE-LGW	08:00	14:35	2 6	B787-9	344			

Note: AviaSolutions analysis. Source for aircraft configuration is Norwegian Air Shuttle' website

The forecast accounts for China Airlines TPE-LGW 4x weekly service (commenced Dec 2017)

# B787-9 Performance

B787-9 range allows a direct connection between LGW and TPE



Norwegian B787-9 has sufficient range to serve London Gatwick – Taipei with **full passenger and baggage payload** and 10.4 tonnes of cargo

<b>Max Design Zero Fuel Weight</b> (to reach distance of 6.7 thousand nautical miles)	<b>175,300 kg</b>
<b>Operating Empty Weight</b>	128,850 kg
<b>Passengers + Baggage</b> (105kg per passenger)	36,120 kg
<b>Cargo</b> (maximum per sector)	10,400 kg



# Why Taiwan? Economy, Trade, Tourism



# Market Fundamentals

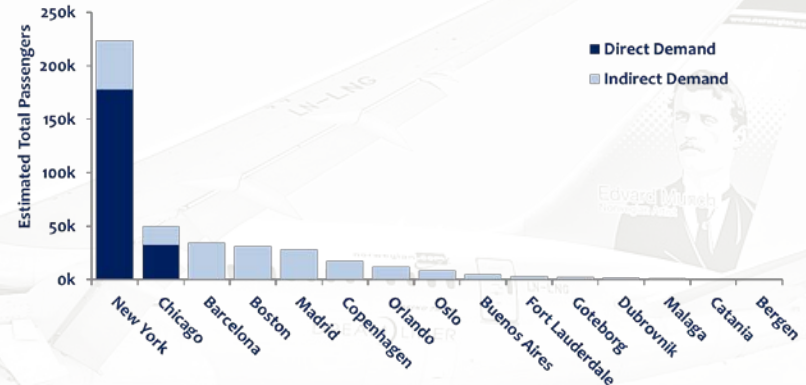
## Established Leisure Market for Norwegian to Serve

### Demand and Trends

- Significant **leisure point to point** market to LGW  
- **91,000** (65% of total leisure + business demand)
- **Strong connecting leisure demand** beyond LGW  
- Europe: **97,300**; USA: **114,000**
- Attractive average one-way net fares in economy (**\$331**) and premium cabin (**\$739**)
- Strong fit with **DY leisure customers**
- **65,000** UK visitors to Taiwan and **48,000** Taiwanese visitors to UK (2017)

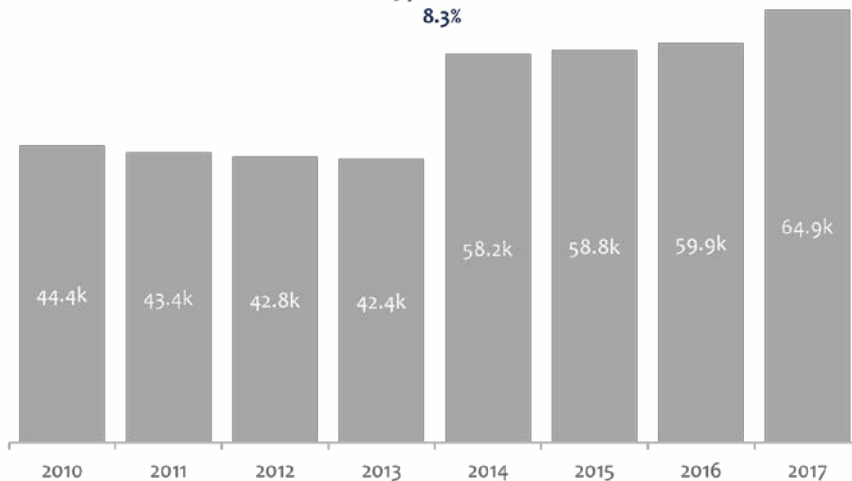
### Strong Demand to Europe/US

Top 15 City Pair Markets From Taipei Beyond London  
Source: Sabre MI 2017, AviaSolutions analysis



### Increasingly Popular Tourist Destination

UK Residents Visits to Taiwan  
Source: Tourism Bureau MOTC  
5 year CAGR  
8.3%



### Established UK-Taiwan Links

- **51,000** Taiwan born residents live in UK (2017) | nearly half of which live in **London** and the **south east**
- **8.3%** average annual growth in UK visitors to Taiwan (last 5 yrs)
- **16,000** Taiwanese overseas students study in UK (2016)
- **£5.75bn** UK-Taiwan bilateral trade (2017)
- UK is Taiwan's **#3 largest** trading partner in Europe
- UK is Taiwan's **#5** recipient of foreign direct investment |

# Taiwan Ranks Highly as a Leading Global Destination

Growing popularity with **UK** visitors (+8.3% CAGR last 5 years)



**Taipei City wins Global Traveler award for  
'Best Leisure Destination in Asia'**

*(Global Traveller Magazine 2018)*

**Top 10 Up and Coming Destination**

*Booking.com (2018)*

**#10 Asia Pacific City – Taiwan, MasterCard  
Index of Global Destination Cities (2017)**

**#1 World's Best Food**

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**#6 Emerging Tourist Destination**

*Skyscanner global destination rankings (2016)*

**#5 Cycle Route Worldwide – Sun Moon Lake**

*One of the world's most beautiful cycle paths, CNN (2017)*

**One of the Best Tourism Destinations**

*Lonely Planet global rankings (2015)*



# Links Between London and Taipei

# Established leisure market for Norwegian to serve

Taiwan and UK enjoy frequent and close exchange in tourism, education, trade, investment and technology



**51,000 Taiwan born** residents live in UK

**65,000 UK** residents visited Taiwan in 2017

**48,000 Taiwanese** residents visited UK in 2017

**16,000 Taiwanese overseas students** study in UK; the #2 largest destination after USA (2016/17)

From March 2009, Taiwanese passport holders visiting the UK for six months or less **no longer require a visa**

**5 major Taiwan commercial banks maintain London branches:** Bank of Taiwan, Hua Nan Bank, Chang Hwa Bank, First Bank and Mega International Bank



**180 Taiwanese** companies are based in the UK

UK is Taiwan's #3 trading partner in Europe

UK is Taiwan's #5 recipient of foreign direct investment (**US\$9.17Bn** 1952-2017)

**£5.75bn** Bilateral trade in 2017 (MOFA)

**300 UK** companies in Taiwan – financial and business services, ICT, telecommunications, infrastructure, environmental technology, creative industries and marine industries



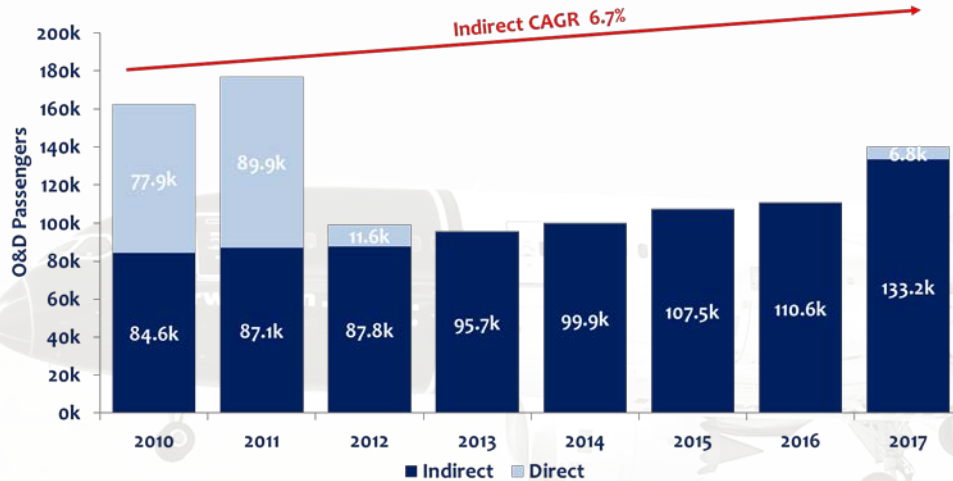
# LGW-TPE Market Background

# Market Background

## Point to Point Traffic

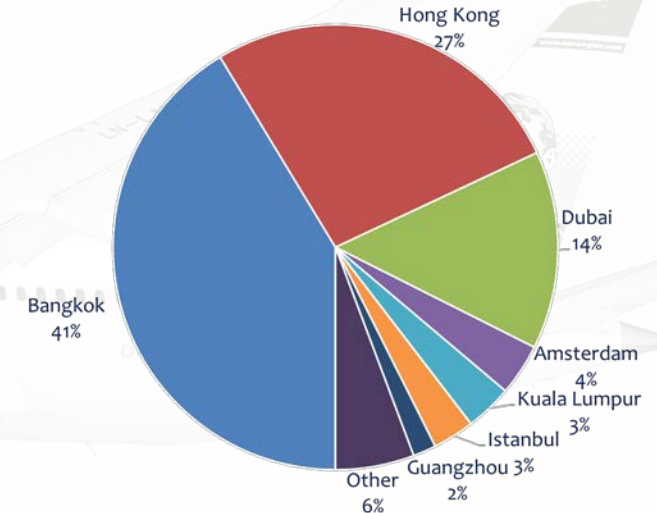
London - Taipei Point to Point Traffic 2010-2017

Source: Sabre MI 2010-2017, AviaSolutions analysis



Major Connecting Points for Demand Between London and Taipei

Source: Sabre MI 2017, AviaSolutions analysis



Indirect traffic increased by **6.7%** CAGR (2010-2017)

**133.2k** passengers flew indirectly between Taipei and London (Sabre MI data 2017)

Several hubs share indirect traffic connecting Taipei and London

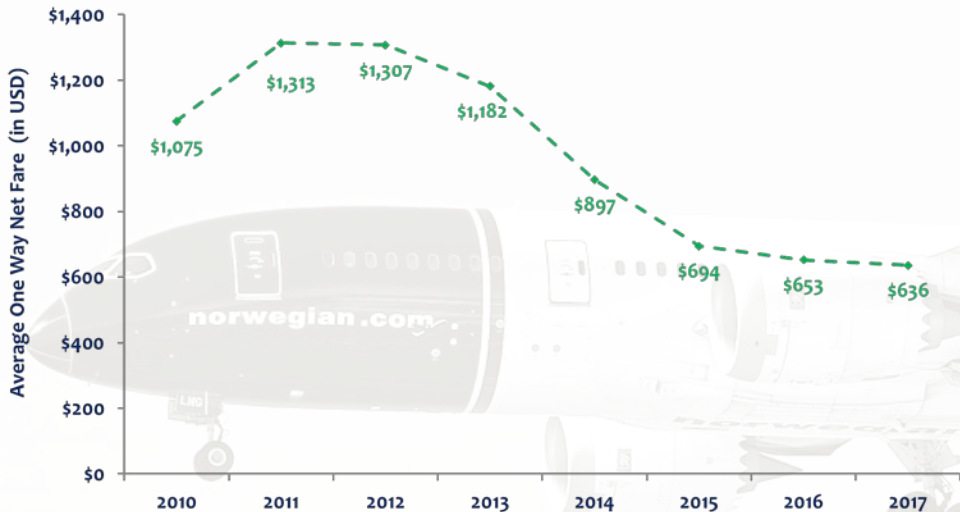
**Bangkok (41%)** provided the most connections followed by **Hong Kong (27%)** and **Dubai (14%)**

# Market Background

## Point to Point Fares

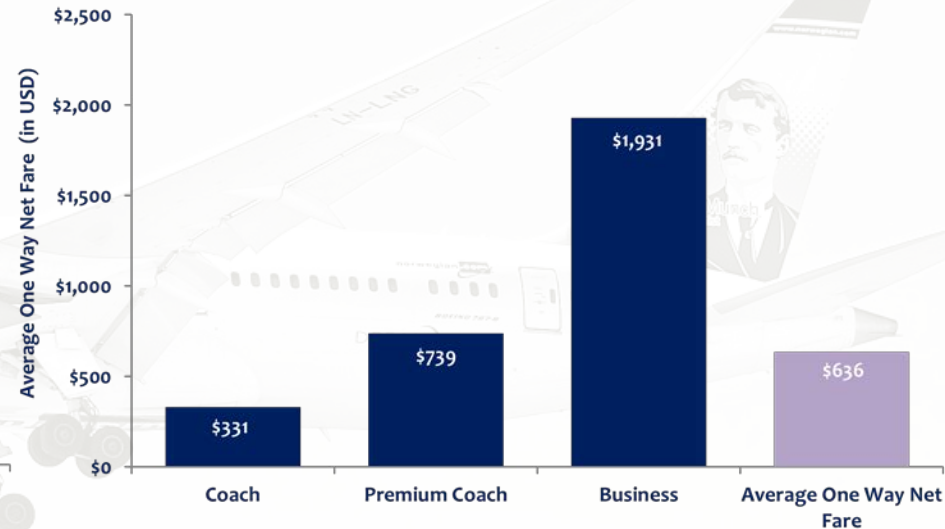
London - Taipei Point to Point Fares 2010 - 2017

Source: Sabre MI 2017, AviaSolutions analysis



London - Taipei Point to Point Fares by Class

Source: Sabre MI 2017, AviaSolutions analysis



Average O&D one way net fares between Taipei and London declined from **\$1,075** in 2010 to **\$636** in 2017 (Sabre MI data 2017)

Increased competition over hubs with lower fares has led to increased demand

Average fares are much higher than those offered by Norwegian, therefore the direct Norwegian service would not be affected by the decreasing fare trend

Average O&D one way net fares between Taipei and London show moderate fares in **Coach (\$331)** and high fares in **Premium Coach (\$739)** and **Business (\$1,931)**

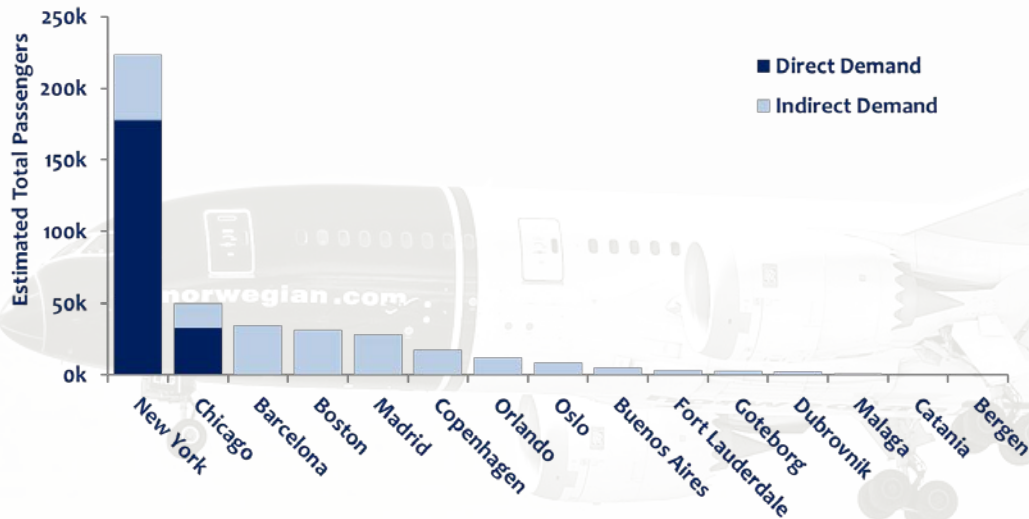
Fares are considerably higher than that offered by Norwegian; therefore the market is strong enough to sustain a leisure low cost service

# Market Background

## Connecting Traffic from Taipei beyond London

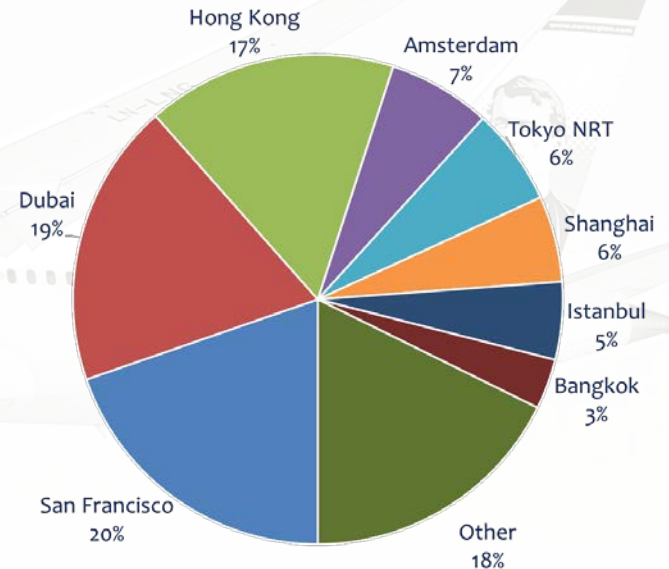
Top 15 City Pair Markets From Taipei Beyond London

Source: Sabre MI 2017, AviaSolutions analysis



Taipei to Cities beyond London - Major Connecting Points

Source: Sabre MI 2017, AviaSolutions analysis



The largest markets from Taipei beyond London are **New York**, **Chicago** and **Barcelona**

Several hubs share indirect traffic connecting Taipei with destinations beyond London

**San Francisco (20%)** is the main connecting point followed by **Dubai (19%)** and **Hong Kong (17%)**





# Taoyuan International Airport



# TPE To European Destinations

## Traffic and Achievable Load Factors

TPE to European Destinations  
Achievable Load Factors

Source: Taiwan CAA January - June 2018



TPE to European Destinations  
Passenger Traffic

Source: Taiwan CAA January - June 2018



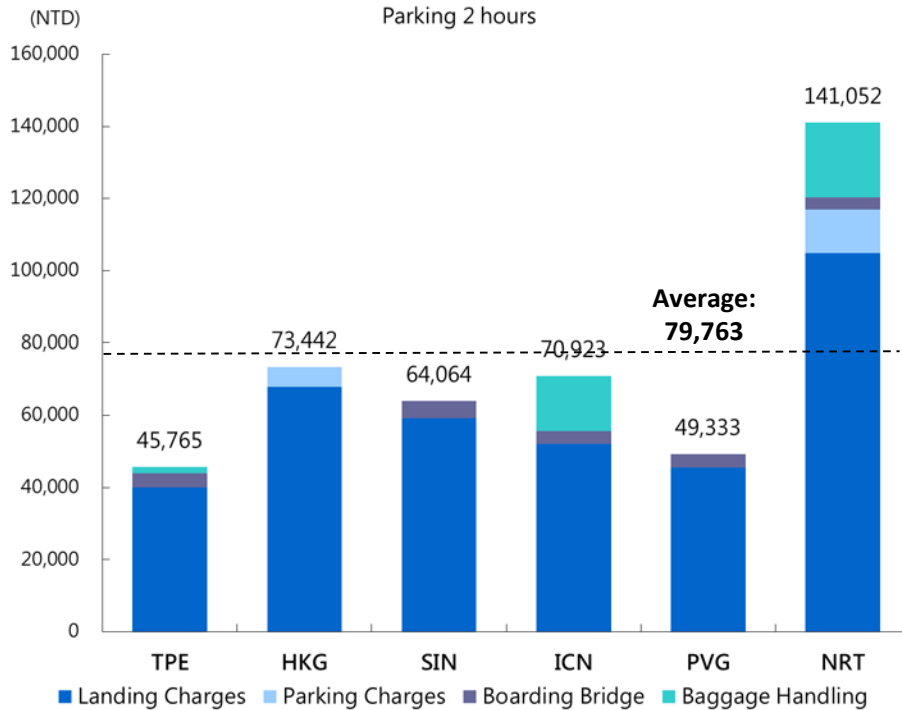
European carriers achieve high load factors ranging from **77%** to **92%**

The most popular European route is AMS (KL) with **123k** passengers (Jan-Jun 2018), followed by FRA (CI) (**99k**) and CDG (BR) (**98k**)

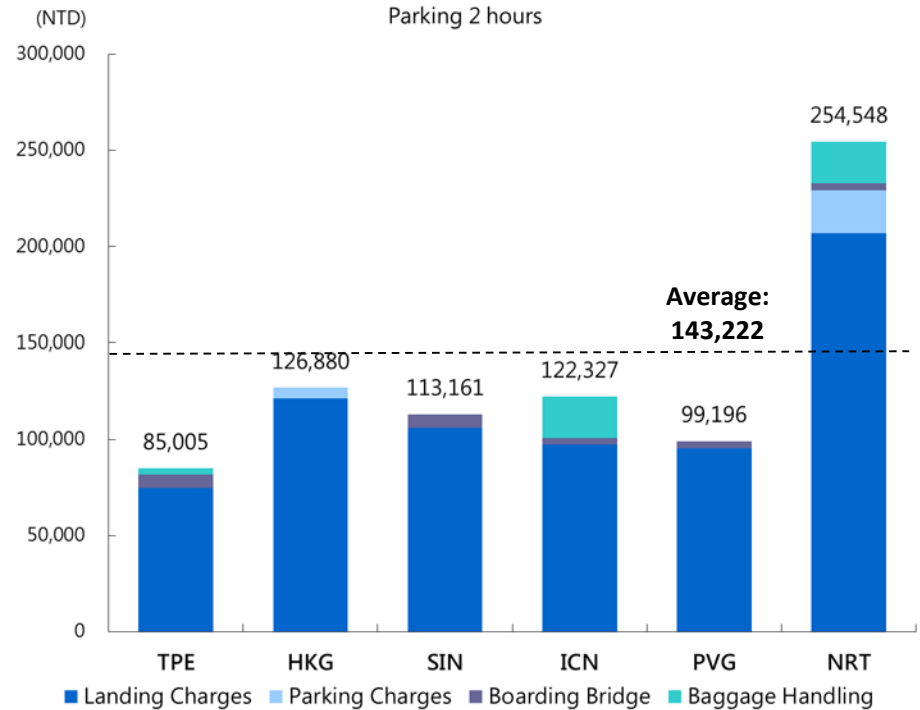
# TPE Airport Charges

TPE Airport Charges do not exceed average charges of main East Asian airports

**A330-300 (PAX 295)**  
Parking 2 hours



**B747-400 (PAX 416)**  
Parking 2 hours



# TPE Current Incentive Scheme

Program aims to invite air carriers to operate and develop new routes at TTIA.

Applicable flights:

- **Scheduled direct flights**

Eligibility:

- **New route for Taoyuan Airport (not to have been opened for the last year before application date)**
- **Flights must inaugurate within 3 months after TTIA has approved the application**

Incentive Scheme	Details
Landing Fee	Qualified flights have landing fee <b>50% off.</b>
Boarding Bridge Charge	Qualified flights arriving and departing between 0:00~04:59 a.m. (same day) and departing in 2 hours have boarding bridge charge <b>50% off.</b>

TPE Incentive Scheme application deadline is **December 31, 2018.**  
All applications must be completed before the deadline.

# TPE Marketing Support Program

## TTIA New Airlines and Routes Promotion Incentive Programs

Program aims to invite new air carriers to operate and develop new routes at TTIA

Candidates categories:


**Category 1** - New air carrier entrant, operating regular flights from TTIA

**Category 2** - Newly opened regular direct route to TTIA

**Category 1** should be air carriers that have not operated on any route at TPE.

**Category 2** routes should not have been opened for the last two years before application.

Qualified candidates will obtain one-time FREE marketing exposure of TTIA New Airlines and Routes Marketing Support Program.

TTIA New Airlines and Routes - Promotion Incentives Program				
Media	Content	Times	Comments	
TPE Social Media	Facebook post	Chinese and English content + pictures	Once	1. Airlines should provide TIAC with marketing content upon application.
	Instagram post	English content + pictures	Once	2. TIAC reserves the right to edit any submitted material.
	Twitter post	English content (less than 140 words) + pictures	Once	
Other Channels (one option only)	Option I	Print media	Twice	1. Select one option only
		Internet media	Once	2. All the media items including print media, internet media and outdoor media are selected from the attached list.
	Option II	Print media	Once	3. Airline logo and city image of the new route should be submitted to TIAC in AI format for TIAC to complete the artwork production and arrange media exposures.
		Internet media	Once	4. Airlines should provide TIAC with words, pictures and website link for internet media exposure.
		Outdoor media	Once	5. No specified position and date should be appointed.
	Option III	Print media	Once	6. TIAC reserves the right to revise the submitted materials.
		Internet media	Twice	
	Option IV	Internet media	Triple	
		Internet media	Twice	
Option V	Internet media	Twice		
	Outdoor media	Once		

Candidates are required to submit a copy of Air Route Certificate issued by CAA and filled application form to TIAC no later than 45 days before inauguration.

# TPE Incentive Scheme & Marketing Support Program

## Application Procedure



**norwegian**

**Norwegian Route Certificate**  
(issued by CAA, MOTC)  
Application Forms  
**Promotion Materials**

*Submission*



Taoyuan  
International Airport  
桃園國際機場

**Business Planning and  
Marketing Department of TIAC**  
Incentive Scheme: [emilycyang@mail.taoyuan-airport.com](mailto:emilycyang@mail.taoyuan-airport.com)  
Marketing Support: [amanda0603@mail.taoyuan-airport.com](mailto:amanda0603@mail.taoyuan-airport.com)

*Marketing evidence one  
month after promotion  
materials release*



**norwegian**

Program expires on **31 December 2018**.

TIAC will revise the budget execution and effectiveness to extend program.

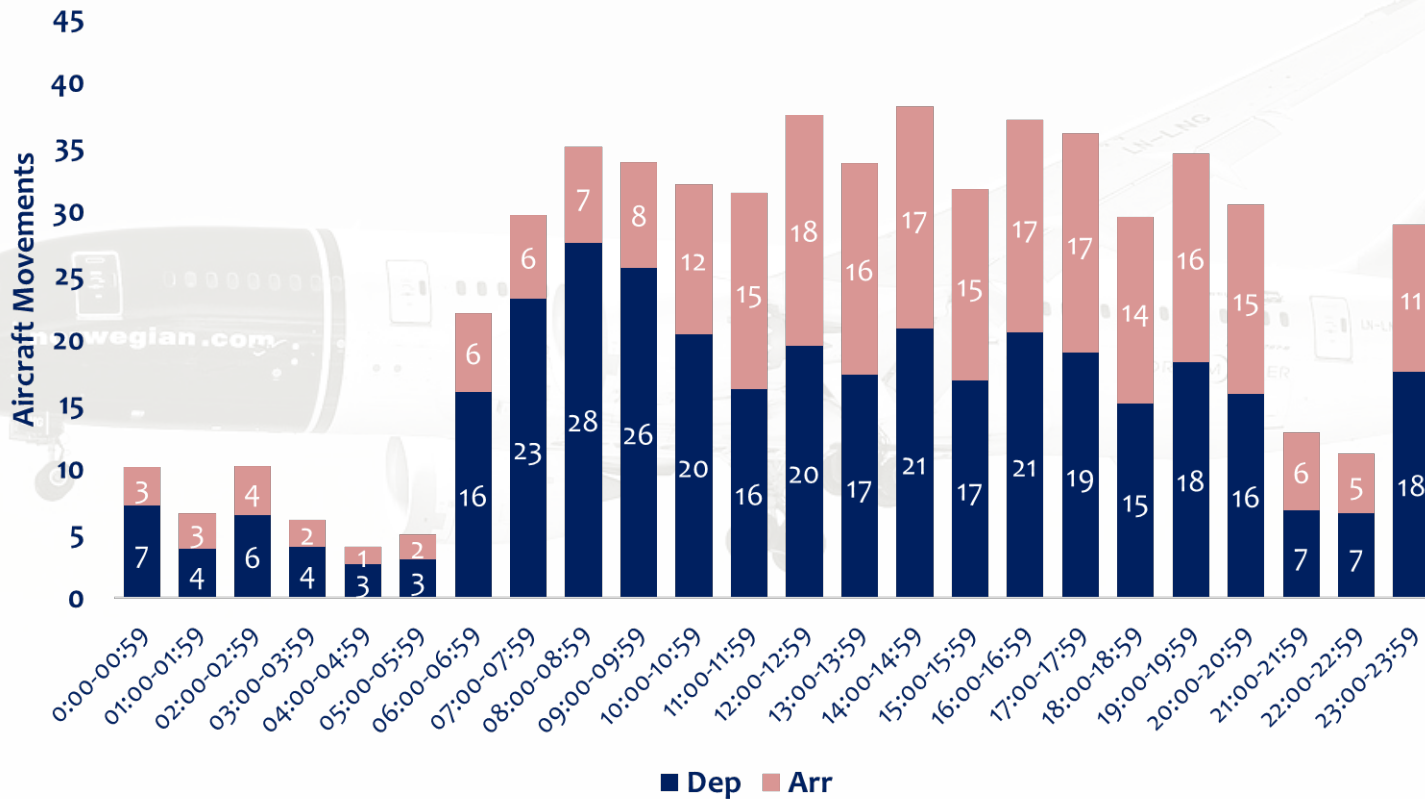
Program takes effect after official announcement.

TIAC has the right to extend, revise program.

# TPE Slots Usage

## TPE Aircraft Movements - Daily Average

Source: Taoyuan International Airport, June 2018



Peak hour **12:00-13:00, 14:00-15:00 and 16:00-17:00**

Capacity of **50** movements per hour and **90** movements in **2** consecutive hours

# Steps to Commence Operations at Taipei

**Decision to serve**



Taoyuan  
International Airport  
桃園國際機場

*Contact CAA for  
official permission  
to operate at TPE*



**Application for** 

- Air Route Certificate
- Application for Station Manager Office, if applicable

*Discuss  
operations  
with TIAC*



## **Confirmation on**

- Terminal choice
- Check-in counter arrangement
- Boarding gate arrangement
- IT & communication system
- Office rent agreement
- Other administration issues

## **Contact Person**

Mr. Tom Chen

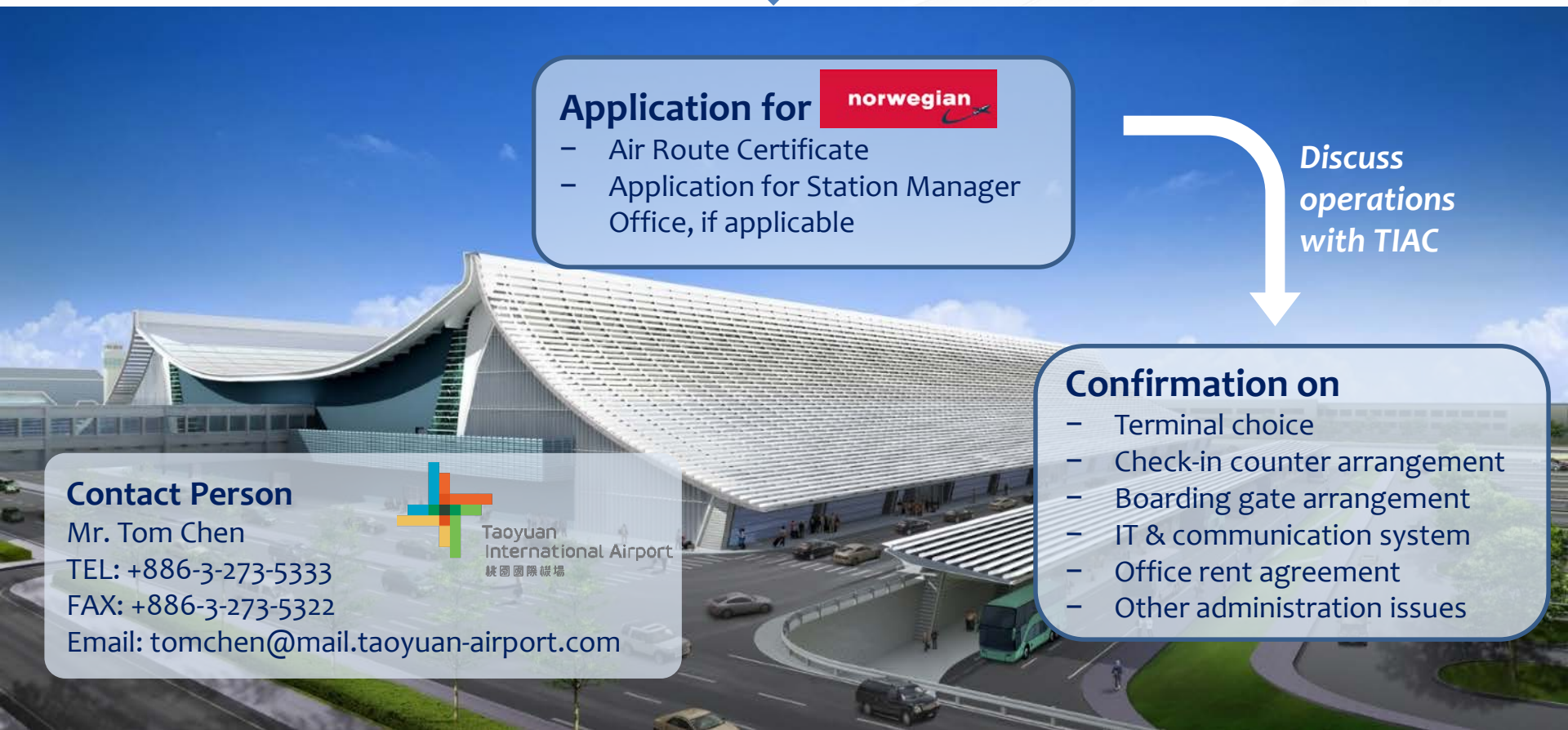
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Taoyuan  
International Airport  
桃園國際機場





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