

Current Status and Future Potential of Cross-Strait Tourism

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ABSTRACT

Tourism and hi-tech industries are regarded as two important industries in the 21st century. In response, Taiwan government has made efforts to promote tourism for Taiwan in recent years. However, to achieve the targets of the Plan for Doubling Tourist Arrivals, Chinese tourists are needed. Since under current government policy and national security considerations, Mainland Chinese belonging to the first category are still forbidden to visit Taiwan for tourism. In the future, once the policy is formulated, the ban will for sure be lifted. By then, the number of Chinese tourists to Taiwan will multiply and related businesses in Taiwan must be ready for them. This study intends to investigate the circumstances related to Chinese tourists' visits to Taiwan and offer the results as suggestions and references to Taiwan government and related businesses for making early preparations.

Keywords: *Tourism, Travel industry*

INTRODUCTION

In his national policy research report, Chen Shi-Yi (2006) said, "Tourism is politics without slogans, foreign policy without formality, publicity without written words, education without classrooms and industry without chimneys. Formulated with consensus and functioning invisibly, it has a profound and long-lasting impact." This is an appropriate description of the importance of tourism for Taiwan.

According to an analytic report from World Tourism Organization (WTO), tourism today not only has become the main source of foreign exchange for many countries but also helps create job opportunities. In recent years, Taiwan government has listed tourism under key national development plans. In 2001, as a positive attempt to promote tourism for Taiwan, the government released the "21st Century New Taiwan Tourism Development Strategies", announced the "Plan for Doubling Tourist Arrivals", and allowed Mainland Chinese tourists of the 2nd category (Chinese tourists coming via a third destination other than Hong Kong and Macao to Taiwan for tourism or business) and of the 3rd category (Chinese tourists having resided in Hong Kong, Macao or any overseas location over 4 years and having obtained a work permit) to visit Taiwan.

Data from the Tourism Bureau reveal that the number of foreign visitors to Taiwan was estimated to reach 3.75 million in 2007. If the 1st category (Mainland Chinese coming directly from China via Hong Kong or Macao) were also permitted to visit, the number could be increased by 250 thousand. The total would be 4 million and the production value of the tourism industry could rise from NTD171.4 million to 190.6 million. Adding this to the 225.4 million from domestic tourism production value, the entire tourism production value could reach 416 million, at an 11.7% growth of 43.5 million. Without Mainland Chinese tourists, however, the 2007 tourism production value would only be 386.8 million, at an increase rate of 6.55%.¹

China's rapid economic buildup has resulted in staggering upsurges of outbound tourists over the past years. In 2004, 28.85 million person-times took trips overseas, at an increase of 42.68% from 2003, and made China the country with the most outbound tourists. According to opinion polls conducted in Chinese coastal cities, as many as 50 million person-times rated Taiwan as the first choice among overseas destinations. World Tourism Organization predicted that by 2020 Chinese outbound travel could reach 100 million person-times and put China as the world's 4th biggest tourist

source country. Such enormous potential and the accompanying high consuming power have prompted other nations to adopt various measures to grab a share of this market. The advantages for Taiwan's tourism production value from opening the door to Mainland Chinese tourists are clear and simple. Presently, Mainland Chinese of the 1st category are still forbidden to visit Taiwan for tourism. If the ban could be lifted to open Taiwan to all Mainland Chinese, the contribution to Taiwan's economic progress would be tremendous. Under Taiwan government's tourism promotion efforts, many of Taiwan's unique tourism resources and cultural characteristics have begun to attract foreign tourists. Until now, academic studies related to Mainland Chinese visitors to Taiwan have been limited. This study may be able to offer valuable references to Taiwan government, businesses interested in bringing in Mainland Chinese tourists, and other related travel businesses.

With the abovementioned in consideration, this study has the following purposes:

1. To examine Taiwan's economic development potential as a result of opening visits by Mainland Chinese tourists
2. To analyze Mainland Chinese tourists' main activities and consumption tendencies in Taiwan
3. To offer the study results as suggestions for Taiwan government and concerned businesses

INVESTIGATION OF RELATED LITERATURE

Travel business in the narrow sense and in the broad sense

The earliest definition of the travel business was "a commercial operation that makes transportation and accommodation arrangements on behalf of travelers by performing related services such as attaining visas, acting as an intermediate and making purchases and sales by providing tour guiding, negotiating, and processing necessary procedures in exchange for monetary rewards." By this definition, the travel business is a group of businesses that operate with travelers as commercial targets and create conveniences for their travel activities by providing needed products and services. The characteristics are: 1. It is demand oriented, with travelers as its service targets. 2. It covers a wide range of aspects. 3. It is a service industry with modern sales and marketing concepts centered on travelers. The travel business in the narrow sense refers to a collection of operations that produce strictly core travel products. In the broad sense, the travel business means a collection of businesses that produce combined travel products. (Harbin University)

Definition of Travel Agent

Table 1. Definition of Travel Agent

Year	Organization	Definition
1992	American Society of Travel Agents (ASTA)	An individual or firm which is authorized by one or more principals to effect the sale of travel and related services.
1996	Tourism Bureau of Ministry of Transportation and Communications	A business that provides the public with travel related services and conveniences, with its main business function based on professional travel knowledge and travel information gathered from experience to offer needed assistance and services to the public.
2003	Tourism Business Committee, Tourism Bureau of Ministry of Transportation and Communications	A businesses that processes required procedures for traveling and visa attainment on behalf of travelers or makes travel, dining and accommodation arrangements for travelers and provides related services in exchange for monetary rewards.

Source: Compilation for this study

Definition of tourism

The word tourism comes from Latin and has the connotation of traveling in different places. Tang Xue-bin (1994) thought tourist activities in the narrow sense contained four elements: People leave their daily residence, move toward predetermined destinations, carry no intention to make profits, and appreciate local customs and cultural objects. For the broad sense of tourism, economy, academic studies and culture were added. In short, tourism is observation of human activities in other places or countries, including culture, social structure, folk customs, conditions of the country,

industrial structure and social structure, etc, to increase one's knowledge and experience. The Statistical Commission of the United Nations defined tourism as having three basic elements: 1. Travelers undertake activities away from their regular residences. 2. Transportation is needed to carry them to the destinations to conduct these activities. 3. These destinations must provide adequate software and hardware facilities and services to meet the needs of travelers during their stays.

Table 2. Definition of Tourism

Year	Organization	Definition
1950	Tanaka Kiichi	Tourism means leaving one's regular residence to conduct travel activities and pleasurable consumption out of one's own choice during the stay.
1981	The International Association of Scientific Experts in Tourism(AIEST)	Tourism means conducting activities away from one's home, either staying overnight or not, as a result of one's own choice.
1995	World Tourism Organization	Tourism is the collective term that means leaving one's home for activities of leisure, commercial, social or other purposes at distant places.

Source: Compilation for this study

CURRENT STATUS OF TOURISM INDUSTRY IN TAIWAN

Current status of tourism market and consumption tendencies in Taiwan

Data from Tourism Bureau show that 3.52 million person-times visited Taiwan in 2006, an increase of 4.19% from 2005, and brought USD5.136 billion of foreign exchange, a growth of 3.19% compared to the year before. All relevant indexes disclose positive growths, except in the areas of "average consumption per visit," "average length of stay," and "average daily consumption," which show negative growths. Relevant index data for Taiwan travel market are shown below:

Table 3. Relevant Index Values for Taiwan Travel market 2004 ~ 2006

Index	2004	2005	2006
Visiting person-times	2.95 million person-times	3.38 million person-times	3.52 million person-times
Foreign exchange from Tourism	USD 4.053 billion	USD 4.977 billion	USD 5.136 billion
Ratio of foreign exchange from Tourism in GDP	1.22%	1.40%	1.41%
Average spending per tourist per visit	USD 1,374	USD 1,473	USD 1,459
Average length of stay	7.61 nights	7.10 nights	6.92 nights
Average daily spending per visitor	USD 180.52	USD 207.50	USD 210.87
Visiting person-times for tourism purposes	1.03 million person-times	1.38 million person-times	1.51 million person-times
Average daily spending per visitor for tourism purposes	USD 238.25	USD 267.02	USD 245.47
Visiting person-times for business purposes	0.92 million person-times	0.94 million person-times	0.95 million person-times
Average daily spending per visitor for business purposes	USD 159.63	USD 175.26	USD 194.10
Visitors' overall degree of satisfaction	81%	85%	89%
Visitors' willingness to visit again	*	96%	98%

Note: * stands for data unavailable.

Source: Consumption Tendencies and Favored Activities of tourists in Taiwan by Tourism Bureau(2006)

Progress and current status of visits by Mainland Chinese for tourism purposes

In November 2001, the Executive Yuan passed the "Plan for Permitting and Promoting Visits by Mainland Chinese Tourists for Tourism Purposes" and began to allow Mainland Chinese of the 3rd category to visit Taiwan for

tourism purposes in January 2002. This category includes Mainland Chinese nationals who have studied or resided overseas and acquired local permanent residence statuses. In May the same year, Mainland Chinese of the 2nd category were also permitted to visit for tourism purposes – this category encompasses Mainland Chinese visiting Taiwan on their way to travel overseas for tourism or business purposes under the premise that their visits to Taiwan are not in violation of Chinese laws. The restrictions on the 3rd category were also loosened to include Mainland Chinese having resided in Hong Kong or Macao for four years and above and having acquired a work permit, and their spouses and direct family members. The change took place to accommodate the installation of Taiwan’s representative office in Hong Kong International Airport to process visa applications from qualified Mainland Chinese and their families.² As the two sides across the Strait have not been able to negotiate, the Mainland Affairs Council’s decision disallowing Mainland Chinese of the 1st category to visit remains unaltered for national security considerations. Currently a quota system is being practiced, allowing 1000 Mainland Chinese of the 2nd and 3rd categories to visit for tourism purposes each day on a “group in and group out” basis. (Zheng Zhong, 2006)

Since the government’s announcement of the “Statute for Relations between People in Taiwan and Mainland China” on July 31 1992, family visits, work, tourism and academic exchange across the Strait have been gradually opened in the past fourteen odd years. According to statistics from National Immigration Agency of Ministry of the Interior, a total of 30,000 Mainland Chinese person-times visited Taiwan in the January-February period of 2007, a decrease of 5.62% from the same period in 2006. Among these travelers, 3,433 person-times came for business purposes, an increase of 27.62% from the same period the year before. 11,500 person-times visited for tourism purposes, a decline of 6.65% from the same period in the previous year. Between 1987 and February 2007, 1.5739 million Mainland Chinese³ have visited Taiwan, showing remarkable growths and making rather significant contributions to the development and income of travel businesses and the tourism industry in Taiwan. Statistics of Mainland Chinese visitors to Taiwan are as follows

Table 4. Numbers of Mainland Chinese Visitors to Taiwan

Time	For business purposes		For tourism purposes		Other purposes		Total	
	Person/time	Growth (%)	Person/time	Growth (%)	Person/time	Growth (%)	Person/time	Growth (%)
1987-1988	0	-	0	-	414	-	414	-
1989	0	-	0	-	4,849	-	4,849	-
1990	0	-	0	-	7,524	55.17	7,524	55.17
1991	0	-	0	-	11,116	47.74	11,116	47.74
1992	0	-	0	-	13,177	18.54	13,117	18.54
1993	0	-	0	-	18,445	39.98	18,445	39.98
1994	0	-	0	-	23,654	28.24	23,654	28.24
1995	158	-	0	-	42,137	78.14	42,295	78.81
1996	1,144	624.05	0	-	55,401	31.48	56,545	33.69
1997	2,576	125.17	0	-	71,272	28.65	73,848	30.60
1998	4,119	59.90	0	-	86,268	21.04	90,387	22.40
1999	5,359	30.10	0	-	100,895	16.96	106,254	17.55
2000	5,896	10.02	0	-	110,415	9.44	116,311	9.47
2001	9,874	67.47	0	-	124,114	12.41	133,988	15.20
2002	15,729	59.30	2,151	-	136,890	10.29	154,770	15.51
2003	10,666	-32.19	12,768	493.58	111,377	-18.64	134,811	-12.90
2004	13,264	24.36	19,150	49.98	106,930	-3.99	13,344	3.-36
2005	17,409	31.25	54,224	183.15	101,349	-5.22	172,982	24.14
2006	26,427	51.80	98,550	81.75	118,208	16.63	243,185	40.58
Total	112,621		184,692		1,244,435		1,417,839	

Notes: 1. In January 2002, Taiwan lifted its ban on visits by Mainland Chinese for tourism purposes.

2. In the first half of 2003, Taiwan adopted measures to control visits by Mainland Chinese due to the SARS outbreak and, in consequence, the numbers of Mainland Chinese visitors greatly reduced.

3. The growth rate refers to the increase or decrease in the index compared to the same period of the previous year.

Source: The Cross-Strait Economic Statistics Monthly (2007) released by National Immigration Agency of Ministry of the Interior

Presently, due to improved relations and continuing economic development across the Strait, all sectors believe measures such as direct cargo shipment and opening up to Mainland Chinese tourists can bring breakthrough developments. Travel businesses are busy preparing to receive Mainland Chinese visitors. When Mainland Chinese are officially permitted to visit Taiwan for tourism in the future, it will definitely be necessary to design itineraries to meet particular needs of Mainland Chinese visitors. Therefore, it is one of the main concerns of the government and travel businesses to understand the consuming patterns of Mainland Chinese tourists to make preparations.

Possible problems in visits by Mainland Chinese for tourism

The standstill in cross-Strait relations has been caused by long-lasting lack of mutual trust and a negotiation mechanism. Due to security considerations, Taiwan has remained strict on the transportation, numbers of people and application thresholds for Mainland Chinese who intend to visit Taiwan. At present, in the area of transportation, direct traveling is restricted to Kinmen and Mazu, the so-called little three direct links, and the chartered flights during the Chinese New Year and Autumn Festival. Plus, the number of visitors each day is limited to 1,437 people. The numerous restrictions such as these have made increasing of Mainland Chinese tourists a difficult task.

Characteristics of domestic tourist attractions

Taiwan is located to the southeast of China, in the middle of the Eastern Asia island chain. Surrounded by the ocean, it is full of magnificent and changeful landscapes. The climate is mild and products are rich. Whether in natural landscapes, amusement facilities, seaside resorts, cultural and entertainment attractions and countryside activities, resources are abundant. In transportation, travel by air or by land, the airports, railway, high-speed rail, public and private bus services and the highways are convenient. Moreover, Taiwan is situated right at the pivot of transportation in and out of Asia. It is a very convenient travel destination.

CURRENT STATUS OF CROSS-STRAIT TRAVEL BUSINESSES

As restrictions on visits by Mainland Chinese for tourism purposes are not entirely removed, there are no complete data on Mainland Chinese tourists' consumption tendencies and favored activities in Taiwan. This study can only use the survey conducted by Tourism Bureau between January 1 and December 31 on the consumption tendencies and favored activities of foreign and overseas Chinese visitors (including Mainland Chinese tour groups but excluding transiting foreign and overseas Chinese passengers) to investigate the travel characteristics of Mainland Chinese tourists. Shown below are data from Tourism Bureau's Survey on Consumption Tendencies and Favored Activities of tourists in Taiwan in 2006:

4.1 Major factors attracting visitors to Taiwan

The major factors that attract foreign visitors to Taiwan in order of preferences are 1, food, 2, scenery, 3, close distance to home, 4, historic relics, and 5, folk customs. The main attraction for tourists from Hong Kong and Macao is food, whereas the scenery is principal charm for Mainland Chinese. The attraction factors in sequence of significance for Mainland Chinese and Hong Kong and Macao people are as shown in the table below:

Table 5. Attraction Factors for Hong Kong, Macao and Mainland Chinese Tourists to Visit Taiwan

Market	All tourists	Hong Kong and Macao tourists	Mainland Chinese tour groups
Food	1	1	2
Scenery	2	2	1
Close Distance to home	3	5	8
Historic relics	4	7	5
Taiwan folk customs and culture	5	3	4
Commodity prices	6	4	7
Fruit	7	6	3
Mild climate	8	8	6

Source: Compilation for this study, from Consumption Tendencies and Favored Activities of Tourists in Taiwan (2006) by Tourism Bureau

Analysis of Favored Activities of Tourists in Taiwan

1. Counties and Cities Most Visited by Tourists

The most visited counties and cities in Taiwan by tourists are 1, Taipei, 2, Hualien, and 3, Kaohsiung. The more popular counties and cities are 1, Taipei, 2, Hualien, and 3, Jiayi

2. The Most Popular Attractions for Visitors to Taiwan

Night markets, the Palace Museum, Taipei 101 and the Taiwan Democracy Memorial Museum are the four most popular tourist destinations for foreign visitors. Among night markets, Shilin Night Market tops the list as the most visited, while Kaohsiung's Liuhe Night Market comes in second. The main attractions and most favored tourist attractions are listed in order of popularity as follows:

Table 6. Most Popular Tourist Attractions

Ranking	Tourist attraction	Ranking	Tourist attraction
1	Night markets	6	Longshan Temple
2	Palace Museum	7	Martyrs' Shrine
3	Taipei 101	8	Ximending
4	Taiwan Democracy Memorial Museum	9	Danshui
5	Jiufen	10	Toroko National Park, Tianxiang

Source: Consumption Tendencies and Favored Activities of Tourists in Taiwan (2006) by Tourism Bureau

Table 7. Most Popular Sightseeing Attractions

Ranking	Sightseeing attraction	Ranking	Sightseeing attraction
1	Toroko National Park, Tianxiang	6	Palace Museum
2	Kenting National Park	7	Wulai
3	Ali Mountain	8	Taipei 101
4	Jiufen	9	Yeliu
5	Sun Moon Lake	10	Danshui

Source: Consumption Tendencies and Favored Activities of Tourists in Taiwan (2006) by Tourism Bureau

Main Activities of Visitors in Taiwan

The main activities of visitors in Taiwan in order of popularity are shopping, visiting night markets, visiting historic sites, etc. The table below shows the details:

Table 8. Most Popular Activities of Tourists Interviewed

Ranking	Item	Ranking	Item
1	Shopping	6	Taking adventurous or ecological tours
2	Visiting night markets	7	Visiting night clubs and pubs
3	Visiting historic sites	8	Visiting fairs
4	Receiving massages and acupressure	9	Visiting Karaoke or KTVs
5	Taking hot spring baths	10	Visiting arts and cultural events

Source: Consumption Tendencies and Favored Activities of Tourists in Taiwan (2006) by Tourism Bureau

Tourist spending in Taiwan

In 2006, tourists visiting Taiwan spent an average of USD210.87 per day, a growth of 1.62% from the same period the year before. Hotel expenses took the largest proportion at 44.74%, followed by 23.02% of shopping and 12.67% of eating outside hotels. Mainland Chinese tour group members spent a daily average of USD243.95, in which expenses in hotels accounted for 41.80% and on shopping 32.77%. In shopping, Mainland Chinese tour group members spent a daily average of USD79.93, in which 34.09% was for buying jewelry or jade products.

Table 9. Average Daily Spending Per Mainland Chinese Tour Group Member in 2006 (Unit: USD)

Market	Amount	Structural ratio
Expenses inside hotels	101.98	41.80%
Food and beverages outside hotels	10.73	4.40%
Transportation in Taiwan	21.20	8.69%
Expenses on entertainment	26.04	10.67%
Miscellaneous expenses	4.06	1.67%
Expenses on shopping	79.93	32.77%
Total	243.95	100.00%

Source: Consumption Tendencies and Favored Activities of Tourists in Taiwan (2006) by Tourism Bureau

Table 10. Details of Average Shopping Expenses Per Mainland Chinese Tour Group Member in 2006

Ranking	Purchased item	Spent amount (USD)	Percentage
1	Jewelry or jade products	27.25	34.09%
2	Local specialty products	15.37	19.23%
3	Souvenirs or handicraft products	11.54	14.44%
4	Tea	10.88	13.61%
5	Cosmetics or perfume	4.24	5.31%
6	Clothing or related accessories	2.84	3.55%
7	Tobacco and alcohol	2.71	3.39%
8	Electronic products or electric appliances	1.98	2.48%
9	Chinese medicine	1.90	2.37%
10	Others	1.22	1.53%
	Total	79.93	100.00%

Source: Compiled for this study, from Consumption Tendencies and Favored Activities of Tourists in Taiwan (2006) by Tourism Bureau

Future Potential of Cross-Strait Tourism

Chinese outbound tourists have drastically multiplied due to China's rapid economic growth in recent years. The Travel Agent Association of ROC has estimated that allowing Mainland Chinese of the 2nd and 3rd categories to visit Taiwan, at the average of RMB16,000 of tour group fee and spending in Taiwan per person, has generated tourism production value of NTD64 billion per year and each Mainland Chinese tourist can create two job opportunities for Taiwanese people. Additionally, a report from Taiwan Institute of Economic Research revealed that Mainland Chinese tourists may spend a little less than Japanese per tour and rank only No.2 in the world, but their shopping expenses account for one third of the entire travel budget, at the average of USD987 (about HTD32,000) per shopping trip, ahead of any other nationals. These data show enormous potential of business opportunities from Mainland Chinese tourists' visits to Taiwan and likely progress of Taiwanese tourism. Foreign investment can be attracted to boost the tourism industry in Taiwan and create employments. The targets of Taiwan government's "Plan for Doubling Tourist Arrivals" could also be achieved earlier. The future potential of cross-Strait tourism can not be neglected.

CONCLUSIONS AND SUGGESTIONS

Conclusions

The unique cross-Strait relationship makes Mainland Chinese curious about Taiwan. This curiosity can be used to help Taiwanese tourism, especially at a time when tourism is needed to promote Taiwan's economy. Mainland Chinese

tourists account for a rather large proportion of Taiwan's tourism production value. This is a significant proportion because it brings business opportunities for various businesses, generate jobs and attract foreign investment in tourism operations in Taiwan. Taipei is the city most Mainland Chinese tourists wish to visit. Visiting night markets is one of the most popular activities. Toroko National Park and Tianxiang are among most favored attractions. Shopping is one of the main activities. Hotel expenses make up the biggest proportion of Mainland Chinese tourists' daily spending in Taiwan. Jewelry and jade products are the most frequently purchased items. These data can be utilized to help achieve the targets of the government's "Plan for Doubling Tourist Arrivals" and the numbers of Mainland Chinese tourists allowed to visit are the key. Taiwan government and concerned businesses should make early preparations to upgrade Taiwan's tourism production value.

SUGGESTIONS

Suggestions for the Government

Restrictions still exist on visits to Taiwan by Mainland Chinese tourists and upgrading Taiwan's tourism production value by bringing in Mainland Chinese tourists has its difficulties. To speed up the progress of Taiwan's tourism industry, the government ought to readjust these restrictions. Related government measures need reevaluation. Limitations should be loosened to allow more Mainland Chinese to visit. At the same time, tourism development in Taiwan also needs reexamination and constructive measures. The government should work with concerned businesses to establish more complete tourism operations, as well as aid local governments and related businesses to develop characteristics so that similarities and malignant competition can be avoided. As Beijing is about to host the 2008 Olympics, large numbers of tourists from all over the world are bound to pour in. Taiwan government can work with travel businesses to attract these tourists to visit Taiwan by using the unique cross-Strait relationship. Taiwan should also make related preparations aimed at consuming characteristics of Mainland Chinese tourists. For instance, since Mainland Chinese visitors' principal activity in Taiwan is shopping, stores specialized in sales of jewelry, jade, local specialty products, and etc. can be set up to push Taiwan's agricultural and specialty products, promote and market Taiwan's tourism, and draw more Mainland Chinese people to visit to boost revenues from tourism for Taiwan.

Suggestions for Related Businesses

Mainland Chinese of the 1st category are not yet allowed to visit Taiwan, but it is only a matter of time. To accommodate multiplied numbers of Mainland Chinese visitors by then, Taiwanese travel businesses should prepare themselves ahead of time. Presently they can form strategic alliances with related businesses to establish more complete networks aimed at the major activities Mainland Chinese tourists are most likely to undertake in Taiwan. When the ban is completely lifted, every business operation will fight for their share of the market and vehement campaigns can be expected. Therefore, early planning and preparations to upgrade necessary hardware and software and establish one's own attraction mean preemption. Each business should also conduct its own marketing in order to have a foothold in the market.

Limitations of Study

At present, there are no complete data on consumption and favored activities of Mainland Chinese tourists in Taiwan. The only available reference for investigating Mainland Chinese tourists' dispositions is the survey on consumption tendencies and favored Activities of tourists in Taiwan conducted by Tourism Bureau.

NOTES

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