of punctuality, service and safety but with most major carriers now providing these as a basic part of the service, the FFP schemes that offer the most by way of incentives to individual passengers are likely to be the greatest influence on their choice of airline. The large carriers will continue to dominate the market with ever increasing partnership agreements with other airlines and by providing more opportunities to earn extra air miles and goods or services. The future would seem to be built around even more airline groupings that tie in regional, national and international carriers. Verchere[1] quotes a British Airways spokesman who states:

> In FFP terms, an airline is less well placed in those marketplaces furthest from its hubs. The only way to respond to competitive activity at the far end of your route structure is to find other ways of attracting people into a programme.

It is certain that the future will see a combination of global FFPs, together with a continuing evolution of both the ways that mileage is accrued and the manner in which these miles can be redeemed.

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Trends in outbound tourism from Taiwan

In 1979, Taiwan's government relaxed its ban on overseas travel, and permitted residents to travel to mainland China to visit relatives in 1987. In 1994, 4.74 million people travelled abroad, about 22% of Taiwan's total population. Thus has Taiwan become one of the world's most prominent tourist-exporting countries. In this article, we review government outbound tourism policies, analyze the market structure and the characteristics of travellers, discuss problems and propose solutions to improve the nation's outbound-tourism standing, and look at the future of Taiwan's outbound travel.

As a result of Taiwan's rapid economic growth and increasing amounts of disposable personal income, travelling has become part of the way of life for many people. This has fostered the development of Taiwan's outbound travel industry. In 1979, Taiwan's government relaxed its ban on overseas travel, and in 1987 permitted residents to travel to mainland China for the purpose of visiting relatives. In 1994, 4.74 million people travelled abroad, about 22% of Taiwan's total population. In terms of percentage, Taiwan outpaced other Asian countries, including Japan, which saw about 10% of its citizens travel abroad in 1994.[1] While Taiwan's economy keeps on growing, the outbound travel business will continue to flourish. Taiwanese travellers are known as high spenders too, contributing large tourism revenues to host countries. This desirable tendency makes Taiwan one of the most appealing tourist nations of origin in the world.

In this article, we first review government tourism policies and major implementations in the development of Taiwan's outbound travel. We also analyze the market structure and the characteristics of Taiwanese outbound travellers. In addition, we discuss the problems that arise from the tourism boom, and propose a solution to improve the nation's outbound-tourism standing. Finally, we look at the future of Taiwan's outbound travel.

Government tourism policies and major implementations in outbound travel development

Development of Taiwan's outbound travel occurred in the following four stages.

Historical background: 1945–55

Taiwan was occupied by various foreign powers for centuries until the end of the Second World War. From 1895 to 1945, the island was under Japanese occupation. In 1949, the Republic of China (ROC) government, defeated in a civil war by the Chinese communists, moved to Taiwan and set up a provisional capital in Taipei.[2] Outbound travel was little known in Taiwan in those days.

Initial stages: 1956–78

Taiwan's 'economic miracle' was still in its infancy. The main purposes for developing tourism were economic development, attracting international tourists, boosting foreign exchange earnings, promoting investment, creating employment opportunities and increasing the people's income. Owing to a shortage of foreign curren-

Table 1 Outbound departures of Taiwanese, 1979–94

Year	Total	Percentage change
1979	312 446	–
1980	484 901	+55.2
1981	575 537	+18.7
1982	640 669	+11.3
1983	674 578	+5.3
1984	750 404	+11.2
1985	846 789	+12.8
1986	812 928	–4.0
1987	1 058 410	+30.2
1988	1 601 992	+51.4
1989	2 107 813	+31.6
1990	2 942 316	+39.6
1991	3 366 076	+14.4
1992	4 212 734	+25.2
1993	4 654 436	+10.4
1994	4 744 434	+1.93

Source: Tourism Bureau, Ministry of Transportation and Communications, Taiwan, 'Annual report on tourism statistics, 1993' and 'Monthly report on tourism – Taiwan, February 1995'.

cies, the government stringently controlled its foreign expenditure, and a black market for foreign currency thrived during this period. The GNP was still low and people did not have money or time enough to travel much.*

Expansion stage: 1979–90

People's interest in travel was kindled by the rise in per capita income. In 1979, the government relaxed its longstanding ban on overseas travel. Soon after this measure, local travel agencies switched their business focus from serving inbound foreign tourists to serving outbound domestic tourists. Restrictions on establishing new travel agencies were repealed as well. Consequently, the number of travel agencies increased dramatically, from 349 in 1979 to over 1100 in 1990. This led to chaotic price-cutting, a drop in quality of service and a proliferation of disputes between consumers and travel agencies. Measures were taken to maintain market order; above all, Travel Quality Assurance Associations were founded in Taipei, Taichung and Kaohsiung to protect travellers' welfare and to ensure travel quality. In the meantime, Tourist Information Service Centers were also established in Taipei, Taichung, Tainan and Kaohsiung to provide instruction on international etiquette and required guidelines for people going abroad so they would have a better understanding of special laws and customs in host countries. In 1990, the government repealed the Embarkation and Disembarkation Card (E/D Card) requirement for residents, and also allowed them to declare and remit abroad foreign exchange up to US$5 million per year.

Competitive adjustment stage: 1991–95

Per capita annual income reached nearly US$10 000. The leisure needs of the nation's people for travelling became more urgent. The tourism sites in Taiwan, however, failed to met demands in both quality and quantity. Some citizens now consider foreign countries as their ideal recreational sites. Consequently, Taiwan has become one of the world's most prominent tourist-exporting countries. Meanwhile, to establish fair-trade practices and to promote healthy competition, the government has also strengthened travel agencies' accountability and responsibility, and enforced stricter business regulation. ROC passport validity was extended to six years from 1995. The ROC government has also tried to negotiate visa-free entry for local residents to facilitate overseas travel.

Market structure of outbound travellers

Collection of data relating to outbound travellers from Taiwan was initiated in 1979 by the Tourism Bureau.† The total number of outbound travellers grew 15-fold from 1979 to 1994 (*Table 1* and *Figure 1*). Developments over the last 16 years are analyzed below.

Overall market development

From 1979 to 1986, the number of outbound travellers increased steadily and Japan got the biggest share of the market. The increase was dramatic: from 1.05 million in 1978 to 4.74 million in 1994. This growth resulted mainly from allowing Taiwan residents to visit their relatives in mainland China. Hong Kong and Southeast Asia (namely, Singapore, Malaysia, Thailand, the Philippines and Indonesia) were popular areas and showed tremendous gains in Taiwanese travellers. However, in 1994 growth was marginal. The global economic recession in the first half of 1994, mainland China's 'Qiandao Lake Incident'[3,‡] in March, and the 'China Airlines' Nagoya Airplane Crash'[4,**] in April discouraged overseas travel.

Market share

Under Taiwan's current mainland China policy, direct flights between Taiwan and mainland China are prohibited. People going to mainland China must change aircraft in a third country or area. Therefore, Taiwanese travellers are required to pass through Hong Kong, a roundabout way to mainland China. Consequently, Hong Kong's market share suddenly increased from 18% in 1987 to 36% in 1994 (*Tables 2* and *3*). Taiwan emerged as a fast-growing and large tourist contributor to Hong Kong.[5] The Japanese market dropped drastically from 28% in 1987 to 14% in 1994 (*Figure 2*), while the USA's market share also decreased from 15% to 10%. With the cessation of suspension of official Taiwan–Korea diplomatic relations, the market for Korea declined from 9% in 1987 to 3% in 1994. By contrast, Southeast Asia's market share increased to 27% in 1994 and shows a tendency to flourish. Europe as a whole contributed only 1% of the total share; with ever-increasing economic and trade relations with Taiwan

*The reason for choosing the year 1978 as a turning point was that the government relaxed its travel policy and began allowing its people to travel abroad for pleasure purposes in 1979.

†Unusually for a national tourism organization, the Tourism Bureau encourages outbound as well as inbound tourism.

‡Twenty-four Taiwan tourists and eight mainland crew were murdered on the Qiandao Lake, Zhejiang province on 31 March 1994. Three mainlanders have been arrested in connection with the mass murder.

**The China Airlines plane crashed at Nagoya airport in central Japan on 26 April 1994, killing 263 of 271 people aboard including 87 Taiwanese passengers.

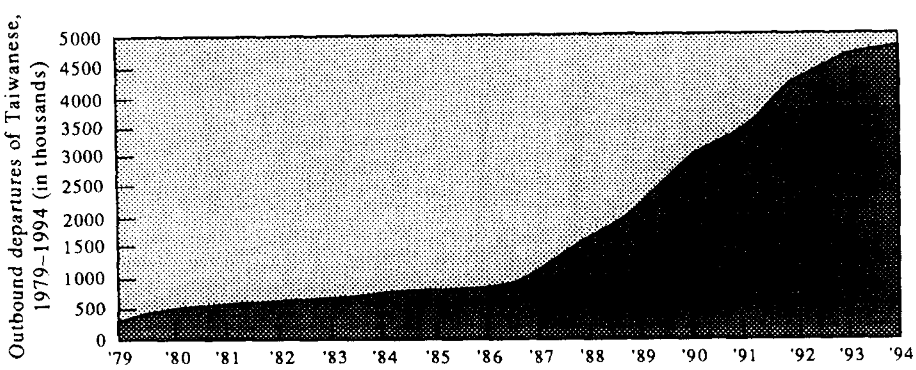

Figure 1 Outbound departures of Taiwanese, 1979–1994

and improving air links, this is expected to grow.

Seasonal distribution

The peak months for outbound travel are the summer months – July and August. Chinese New Year (in January or February with variations of the date owing to the Chinese calendar) and Spring Holidays (from 29 March to 5 April) also attract thousands of youths to go on short-term trips. The off season usually occurs in November and December. These seasonal fluctuations apply to most markets except those of Hong Kong and Southeast Asia, which do not show much variation.

Traveller characteristics

The market was generally for males, aged 30–49. Most of them engaged in trade or were merely general staff. They travelled for pleasure and stayed for 5–15 days. The ratio of males to females was 55:45. However, females scored a higher percentage for travellers under age 29, because males must complete compulsory military service before they can travel abroad.[6]

Mainland China market

Owing to visiting friends and relatives,

Table 2 Outbound departures of Taiwanese by country or region, 1987–94 (000s)

	Year							
Country	**1987**	**1988**	**1989**	**1990**	**1991**	**1992**	**1993**	**1994**
Hong Kong	195	621	810	1 245	1 368	1 749	1 934	1 745
(Mainland China)[a]	N/A	(437)	(541)	(947)	(946)	(1 317)	(1 526)	N/A
Japan	295	340	474	591	653	748	737	676
USA	164	183	157	239	267	286	371	453
Korea	98	100	133	221	284	302	131	122
Southeast Asia[b]	253	306	493	604	729	966	1 213	1 264
Europe	26	22	18	17	20	35	46	65
Other	27	29	22	25	45	128	222	419
Total (n)	1 058 410	1 601 992	2 107 813	2 942 316	3 366 076	4 214 734	4 654 436	4 744 434

Notes: [a]The number of Taiwanese visitors going to mainland China is mostly included in the figure to Hong Kong. This figure is from the Ministry of Public Security, People's Republic of China in *Yearbook of China Tourism, 1994.*
[b]Southeast Asia includes Singapore, Malaysia, Thailand, the Philippines and Indonesia.
Source: Tourism Bureau, Ministry of Transportation and Communications, Taiwan, 'Annual report on tourism statistics, 1993' and 'Monthly report on tourism – Taiwan, February, 1995'.

Table 3 Share of outbound departures of Taiwanese by country or region, 1987–94 (%)

	Year							
Country	**1987**	**1988**	**1989**	**1990**	**1991**	**1992**	**1993**	**1994**
Hong Kong	18.5	38.8	38.5	42.3	40.7	41.4	41.6	36.8
Japan	27.9	21.2	22.5	20.1	19.4	17.7	15.8	14.3
USA	15.5	11.5	7.5	8.1	7.9	6.8	7.9	9.6
Korea	9.3	6.3	6.3	7.5	8.5	7.2	2.8	2.6
Southeast Asia[a]	24.0	19.1	23.4	20.6	21.7	22.9	26.1	26.6
Europe	2.5	1.4	0.9	0.6	0.6	0.8	1.0	1.4
Others	2.3	1.7	0.9	0.8	1.2	3.1	4.8	8.7
Total (n)	1 058 410	1 601 992	2 107 813	2 942 316	3 366 076	4 214 734	4 654 436	4 744 434

Note: [a]Southeast Asia includes Singapore, Malaysia, Thailand, the Philippines and Indonesia.
Source: Tourism Bureau, Ministry of Transportation and Communications, Taiwan, 'Annual report on tourism statistics, 1993' and 'Monthly report on tourism – Taiwan, February, 1995'.

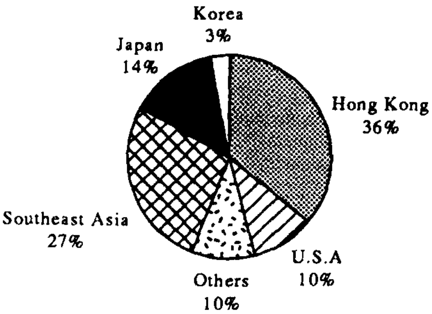

Figure 2 Share of outbound departures of Taiwanese by country or region, 1994 (%)

economic investments, sports, cultural exchanges and academic exchange programs, traffic between Taiwan and mainland China has been increasing since 1979. The number of Taiwanese traveling to the mainland increased from 0.43 million in 1988 to 1.52 million in 1993, approximately quadrupling over the five-year period (*Table 2*). The mainland is the biggest destination for Taiwan's outbound tourists. Similarly, Taiwan, excluding Hong Kong and Macao, contributed the largest number of tourists to the mainland China inbound market.[7]

Traits of Taiwanese outbound travellers

Studies concerning the unique characteristics of Taiwanese outbound travellers are still limited. The following unique consumer behaviors of Taiwanese travellers are purely anecdotal insights from many senior tour conductors, guides and sophisticated travellers. These distinctive characteristics seem to apply to Taiwanese more than to travellers of other countries.

Custom of gift exchanging

Japanese offer *Omiyage* (gifts) to friends or relatives after returning from a trip, and Taiwanese share the same custom to the extent that it has become part of the traditional culture.[8] This tradition prompts the shopping habits of Taiwanese and gradually turns them into enthusiastic shoppers. For some of them, shopping is a fashion and an overriding concern. Part of the reason may rest in the fact that imported goods were very expensive in domestic markets early in Taiwan's history.

Spending

Where shopping and enjoying haute cuisine are concerned, Taiwanese travellers are big spenders as well. They care more for shopping activities than comfortable accommodations while traveling.[9]

Diet

Taiwanese travellers pay much attention to food during their vacations. So long as their appetites are taken good care of, minor flaws in the tour are tolerable. There should be at least one Chinese meal each day during the tour. Fortunately, there are quite a few Chinese restaurants around the world and this is not a problem. Like Japanese and Koreans, Taiwanese travelers do not expect to try exotic cuisine every day.[10]

Exploration

Where backpack travel is concerned, Taiwanese, especially young females, are more exploratory in spirit than Japanese.[11]

The survey of travel consumer behaviors and preferences by Taipei Association of Travel Agents in December 1994 showed that:

- preferable patterns of travel were group package tour 37%, semi-package tour 39% and backpack travel 18%; those in the 46–65 age group preferred to take package tours, whereas the 20–35 age group favored backpack travel;
- preferable types of travel destinations were theme tours 34%, island resorts 31% and single-stops in big cities 30%;
- travel product contents were single-stop and in-depth exploration 79%, multinational and a taste of tour styles 19%; and
- favorable destinations include: (a) Europe, (b) the United States, (c) Southeast Asia, (d) New Zealand and Australia, (e) Northeast Asia (Japan and Korea), (f) Canada, (g) mainland China, (h) Middle East, (i) South Africa.

Interestingly enough, their willingness to travel, discretionary incomes and destination preferences are inconsistent with actual travel behaviors. For example, Europe is the top priority in favorable destinations. However, time, expenditure, language and visa barriers still present a hurdle to Taiwanese travellers going there.[12]

Challenges and opportunities

Here, we identify some obstacles preventing Taiwan's further outbound travel development.

Distribution system

The travel agencies in Taiwan are categorized into three types: general travel agencies (GTAs), tour operator travel agencies (TOTAs), and domestic retail travel agencies (DRTAs). Only the general travel agencies and tour operators are allowed to conduct outbound travel business. Purposely, general travel agencies function as travel wholesalers. GTAs plan, organize both inbound and outbound package tours and market them through tour operators' and domestic retail networks. The distinction between general travel agencies and tour operators is not clearly defined. Most GTAs also sell travel products and services. There are few 'pure' GTAs in Taiwan. The major differences in obligations and rights between GTAs and TOTAs are based on the minimum capital requirements, security deposits, sizes of business and the number of certified managers. Moreover, some TOTAs are reluctant to work as agents for GTAs, preferring to operate their own tours through the 'Travel Pak System' and compete with GTAs in the market.* The chaos of this situation drives tour prices down.

Competition and bankruptcy

By the end of 1994, there were 1820 GTAs and TOTAs in Taiwan. Due to the keen competition, price discounting was the only way to survive. Therefore, low prices, inferior quality,

*'Travel Pak System' is a marketing strategy started by a group of TOTAs, working with air carriers, to achieve better buying powers and resources.

shopping commissions and 'optional tour' rebates have become vital income and profit sources.* This is especially true in Southeast Asian markets. Some practitioners also mentioned that customers are the biggest winners in this keen competition. Local and overseas agents cannot earn reasonable profits. In the worst-case situation, customers may eventually become victims too.

Airlines becoming tour vendors

Air carriers are organizing their own package tours one after another, focusing on the business traveler segment in particular. This 'air ticket plus hotel' product has been widely distributed and has met with success. It is becoming the predominant product for business travel. Obviously, it aroused great conflict between travel agencies and air carriers. Travel agencies insisted on getting higher commissions when selling carriers' bypass products and demanded that the products only be sold through travel agencies' networks, otherwise carriers would be violating regulations set by the Tourism Bureau.

Visa barriers

Following withdrawal from the United Nations in 1971, Taiwan has had a difficult relationship with mainland China and the international community. Only 30 countries maintain formal diplomatic relations with Taiwan at the moment. Substantial relations can only be conducted with those countries that do not have diplomatic relations, through trade, cultural exchange and technological cooperation. Taiwanese travellers applying for foreign visas must deal with some type of tourism promotion offices, cultural or trade associations in Taipei or in Hong Kong. Owing to the nature of these informal organizations, the process is time consuming and costly. Apparently, those countries such as Singapore and Indonesia that provide visa-free programs to Taiwan are gaining favor.

Travel incidents, disputes and accidents

Recently, there have been a few travel incidents, disputes and accidents; for instance , 'the Qiandao Lake Incident', and the robbery and murder incidents that have occurred in Mainland China, Indonesia, Thailand and Italy. Meanwhile, passports have been stolen in vast numbers by professional forgers and sold so that illegal immigrants could enter the developed countries under false pretenses. Such incidents can often be traced to travel industry personnel who were lacking in professional knowledge, abilities and legal concepts.

International marketing shortcomings

The leading outbound general travel agencies seldom join international tourism organizations or participate in world travel marts. They depended exclusively on destination tour operators owned by overseas Chinese to handle all their tour needs. They seem hesitant to deal with local non-Chinese travel service suppliers because of language barriers. Travel is truly a service-oriented business. Travel agencies should invest time, money and effort in becoming members of the international tourism family to obtain the most up-to-date information to meet the needs of the travelling public.

International etiquette

A very small percentage of Taiwanese travellers, like those in the USA and Japan in the 1950s and 1960s, have behaved inappropriately and damaged Taiwan's image. Guiding and correcting these behavior modes and shortening this embarrassing phase in the process of becoming a fully developed country depends on cooperative efforts between the public and the private sectors.

The outlook

Synthesizing government tourism policies, analyses of market structure and characteristics of Taiwanese travellers, and the accompanying challenges are some directions in the future development of Taiwan's outbound travel that merit special attention.

Increase in outbound travellers

As the market has matured, the tendency toward high two-digit growth of outbound travel seems to have run its course. However, single-digit rates of increase are still foreseeable. When Taiwan becomes part of the GATT family, the local travel market inbound and outbound will feel the impact.

Airline deregulation

Due to airline deregulation, passenger seats appear to outnumber potential travellers. To fill their seats, the airlines have to strengthen their marketing strategies with incentives such as bypass products and frequent-flyer programs. These changes in policy will in turn make the retail market more competitive.

The changing structure of travel agent services

To maximize profit margins and minimize costs of travel products, standardization seems to be the direction that travel agencies are taking. They believe the future development of travel agencies will be toward one of two extremes: to become either a small sales outlet or a 'central kitchen' for mega travel products. Regulations of travel agencies in Taiwan were amended in June 1995. Revisions require the general travel agencies to put aside US$ 0.38 million each as security deposits; medium-size agencies will be forced to either merge or simply act as travel brokers; mega-agencies will be allowed more latitude in doing business; and mini-agencies will maintain their function as sales channels of the wholesalers and enjoy profits from sales commissions. Consequently, mega-agencies and mini-agencies will work together and integrate their roles in the market.

Consumerism

Travel abroad has become part of the lifestyle of modern generations in Taiwan. The average age of outbound travellers will go down gradually while, on the other hand, their educational levels will go up steadily. Consumerism is becoming prevalent. The buying process will become more rational and price will not be the only

*'Shopping Commissions', roughly 10–30%, are tokens of appreciation given by the management of shops to tour leaders, tour guides and drivers for generating business.

criterion for purchasing. Planned holidays will form the mainstream, and travel agency images will become a dominant factor in consumer purchasing behavior.

Diversified products

For senior citizens or those traveling abroad for the first time who would like to take a group package tour, one ticket will satisfy all their needs. However, as travellers become more sophisticated and demanding, the travel products need to be more finely tuned and diversified. Single stops, shorter duration stays, custom-tailored and in-depth group package tours, foreign independent package tours and backpack travels are becoming popular travel styles. Those visiting Europe for the second time would prefer to spend 8–9 days in one location such as France, Italy, Germany or the UK. White-collar workers in particular like this single-destination travel pattern. New Zealand and Australia are good examples of this type of market.[13] 'Shorter', 'smaller', 'lighter' and 'thinner' will be the four ideal guidelines in developing tourism products for Taiwan's outbound market.*

The rise of regional tourism

As the Asia-Pacific region moves closer to the world's economic center, the prosperity of regional businesses will certainly enrich travel activities in this area, especially for business travel. The city package will have its place in this market. However, the air links between Taiwan and China via Hong Kong or Macao have become a worrying factor for Taiwanese outbound travel in the lead-up to 1997. The issue of the change in sovereignty of Hong Kong will affect the future of both sides' carriers. This is particularly the case in that Taiwan and China are still at political odds with one another. After 1997, as stated by the Chinese authorities, all traffic rights and bilateral air treaties will have to be agreed by China.[14] Since Taiwanese travellers presently rank first or second in the generating market of Hong Kong and account for about one-third of the Taiwanese outbound market, it is hoped that there will be a new air accord worked out by 1997. In sum, if both sides' authorities abide by the rule of 'separation of politics and economy' and settle the economic problems in a purely economic way, Taiwan and China will benefit each other. Will this happen? It remains to be seen.

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*All these items reflect the travel behaviors and preferences of Taiwanese outbound travelers aged 25–30 in particular: shorter in duration (time), smaller in radius (distance), lower in price (money), and fewer prepaid activities (contents).

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'Reaching high in Denver' – STTE annual conference 1995

Technology and its relevance in tourism education was one of the key themes for the seventh annual conference of the Society of Travel and Tourism Educators held in Denver, Colorado from 9–12 November 1995. Academics and practitioners from Australia, New Zealand and the UK joined those from the USA and Canada for the wide range of research papers and commercial presentations.

Richard Meredith, President of the Colorado Travel & Tourism Authority (CTTA), opened the first session of the conference, detailing how the organization came into existence in 1994 given the exigencies of public sector funding. Although created by the state legislature, CTTA is governed and funded by the tourism businesses it represents; revenue comes from one-tenth of 1% of companies' annual gross revenue with a lower rate for restaurants to reflect the higher proportion of local clientele.