

A Regional Perspective on Tourism Development of Small Islands in Taiwan: A Case Study of the Penghu Islands

Chin-cheng Ni*

National Hsinchu University
of Education

Chang-yi David Chang**

National Taiwan University

The Penghu Islands have developed a tourism industry for more than 30 years, and the other remote Taiwan's small islands such as Kinmen (Quemoy), Matsu, Lu (Green), Hsiao-Liuchiu (Small Ryukyus), Lanyu (Orchid), Kueishan and Keelung have also been promoting tourism in recent years. Islands in nearby foreign countries such as Bali, Phuket, Okinawa, Guam, and Palau have also been attracting many tourists from Taiwan. This paper examines tourism development in the Penghu Islands from public and private sector perspectives both of which are being promoted rapidly because of tourism demands. Tourism development of Taiwan's small islands is in a condition of 'spatial alternation'. More competition between Taiwan's small islands and those in neighboring countries for tourists is becoming obvious. However, tourism development in the Penghu Islands has a bright future, not only because there are adequate supports of the public sector, good marketing of the private sector, and high demand of tourists, but also they already have greater international visibility.

Key words: Taiwan, Penghu, tourism, small islands, spatial alternation, regional competition.

INTRODUCTION

Tourism on Taiwan's small islands has developed for more than three decades. Hsiao-Liuchiu Island is called a "sea paradise" with abundant marine resources. Lanyu Island has attracted many tourists for her indigenous culture. The Penghu archipelago with sixty-four small islands (formerly known as the Portuguese name, Pescadores), off the southwest coast of Taiwan, has been famous since 1960 for the first sea-crossing bridge in the Southeast Asia. After 1987, many other islands have

* Department of Regional Studies in Humanity and Social Sciences, National Hsinchu University of Education, Hsinchu, Taiwan. E-mail: ccni@mail.nhcue.edu.tw

** Department of Geography, National Taiwan University, Taipei, Taiwan. E-Mail: changyi@ntu.edu.tw

been opened to visitors because of the abolition of martial law. Domestic tourism industry has begun to develop very fast in places such as Kinmen, Matzu, Lu, Kueishan, and Keelung islands while Taiwanese people have been getting richer.

Recently, Taiwan tourists enjoy going abroad since the development of tourism in neighboring countries' islands is rapid. Many foreign islands such as Bali, Phuket, Okinawa, Guam, Palau, and others can be added to the list of Taiwan tourists' destinations. The nature landscapes of these foreign islands are similar to that of domestic islands. The main purpose of this paper is an attempt to investigate various aspects of island tourism in Taiwan and the neighboring region, and to focus on the Penghu Islands. There are four research purposes as follows:

1. To review government policies of small island tourism;
2. To investigate the travel agency strategies of marketing and promotion for both domestic and international small island tourism;
3. To examine the opinions of some Penghu visitors in terms of their priorities vis-à-vis domestic vs. international small islands; and
4. To analyze the spatial extent of the marketing region for Taiwan's small islands and their potentials for future development of tourism.

BACKGROUND LITERATURE

Small island tourism is not a new phenomenon. The Romans used the Isle of Capri as a holiday destination 2,000 years ago (King, 1993). Some islands, in the Mediterranean, Atlantic as well as Pacific, have been popular for tourist destinations since the latter part of the nineteenth century (Conlin and Baum, 1995). Tourism has been becoming one of the most important industries for many small islands since the mid-twentieth century (Hoyle, 2002).

In terms of economic growth and diversification, small islands share a number of common characteristics with many island microstates:

- Limited land area, wide geographical spread of the islands, and distance from markets.
- High shipping costs, which raises the price of imports and places exports at a competitive disadvantage.
- Small, fragmented domestic markets that lack critical mass.
- A labor market characterized by a limited skills base and reliance on expatriates (Burns and Cleverdon, 1995).
- Insufficient provision of tourism services.
- Fragile ecosystems.

Part of the appeal of small islands for tourists is their relative isolation and remoteness, being physically separated from larger bodies of land. That physical separateness often is accompanied by political and cultural separateness (Butler, 1993).

Because small island tourism is very different from mainland tourism (Table 1),

the spatial behavior of tourists is very diversified. There are some differences among tourists in terms of sense of distance, sense of security, communications, and probability of returning (Ni, 2000a). The mental distance to island destination for tourists is greater than the actual distance. Small island visitors demand higher mental security and take more time to prepare before tours. Travel agencies get the idea of the lower probability of revisiting owing to the traffic networks. In short, small island tourism creates special circumstances for travel agencies and self-guided tourists to arrange their tours.

Table 1: Comparison of island tourism and mainland tourism.

	Island Tourism	Mainland Tourism
Transport Mode	Air/sea only	Air, sea, land
Tour Type	Weekend (more than one night stay)	Weekday (maybe one-day or weekend tour)
Sense of Distance	Greater than actual	Actual
Sense of Security	Highly needed	needed
Preparation	Complete before tour	Partial before tour
Communications	Less accessible	More accessible
Probability of revisiting	Low	High

Source: Ni, 2000a.

REGIONAL RANGE AND DETERMINANTS FOR ISLAND TOURISM

As noted above, there is a tendency of preference for Taiwan tourists to go abroad. The tourists have increasingly visited international resorts, and have had the alternative of foreign island tours. Thus, the per diem expense gap between domestic island tours and foreign small island tours is becoming narrower. According to surveys of Penghu tourists, the percentage of tourists considering to go abroad as an alternative to Penghu was only 24.4 percent in 1993 and 23.5 percent in 1997 (PNSAA, 1993; PNSAA, 1998), but 48.2 percent in 2001 (Ni and Wu, 2003). The governmental policy of five working days for every other week has possibly caused this change since 1998. The large increase of international tours indicates that the two forms of tourist destinations are becoming more competitive for Taiwan tourists.

In order to distinguish possible competitors with Taiwan's small islands, we can divide islands all over the world into three categories: domestic islands (Table 2, Penghu, Kinmen, Lu, etc.); neighboring islands (Bali, Phuket, Okinawa, Guam, etc.); and distant islands (Caribbean, Mediterranean, Pacific, etc.). There are three factors, distance, time, and expense, determining tourist decisions on where to go.

Distance

Within the immediate region of Taiwan—including Southeast Asia, Northeast Asia, and China—the relations between Taiwan and these areas are very close.

Historical, cultural, and economic factors have produced close interaction between Taiwan and its neighbors. Moreover, a well-developed and convenient transportation system has been established for quite some time in the region. Distances from Taiwan to neighboring countries are relatively short. Hence, Taiwan tourists are likely to travel to these places, including small islands. By contrast, it is more difficult to visit only distant islands by themselves, so the visits are typically combined with mainland tours, such as to Europe. In general, Taiwan tourists prefer to visit nearer islands rather than those far away. The regional range for tourists from Taiwan to other islands is shown in Figure 1.

Table 2: The base data of Taiwan's small islands.

Islands	Area (Km ²)	Resident population	Number of tourist visitors (thousands)		
			1997	1999	2001
Penghu	126.86	92,268	451	462	442
Matsu	29.52	8,763	NA	75	67
Kinmen	150.34	58,933	NA	436	364
Hsiao-Liuchiu	6.80	13,326	151	131	152
Lanyu	47.31	3,445	61	44	52
Lu	15.09	3,289	290	296	274
Kueishan	2.84	0	*	*	28
Keelung	0.24	0	*	*	NA

* Restricted area before 2000.

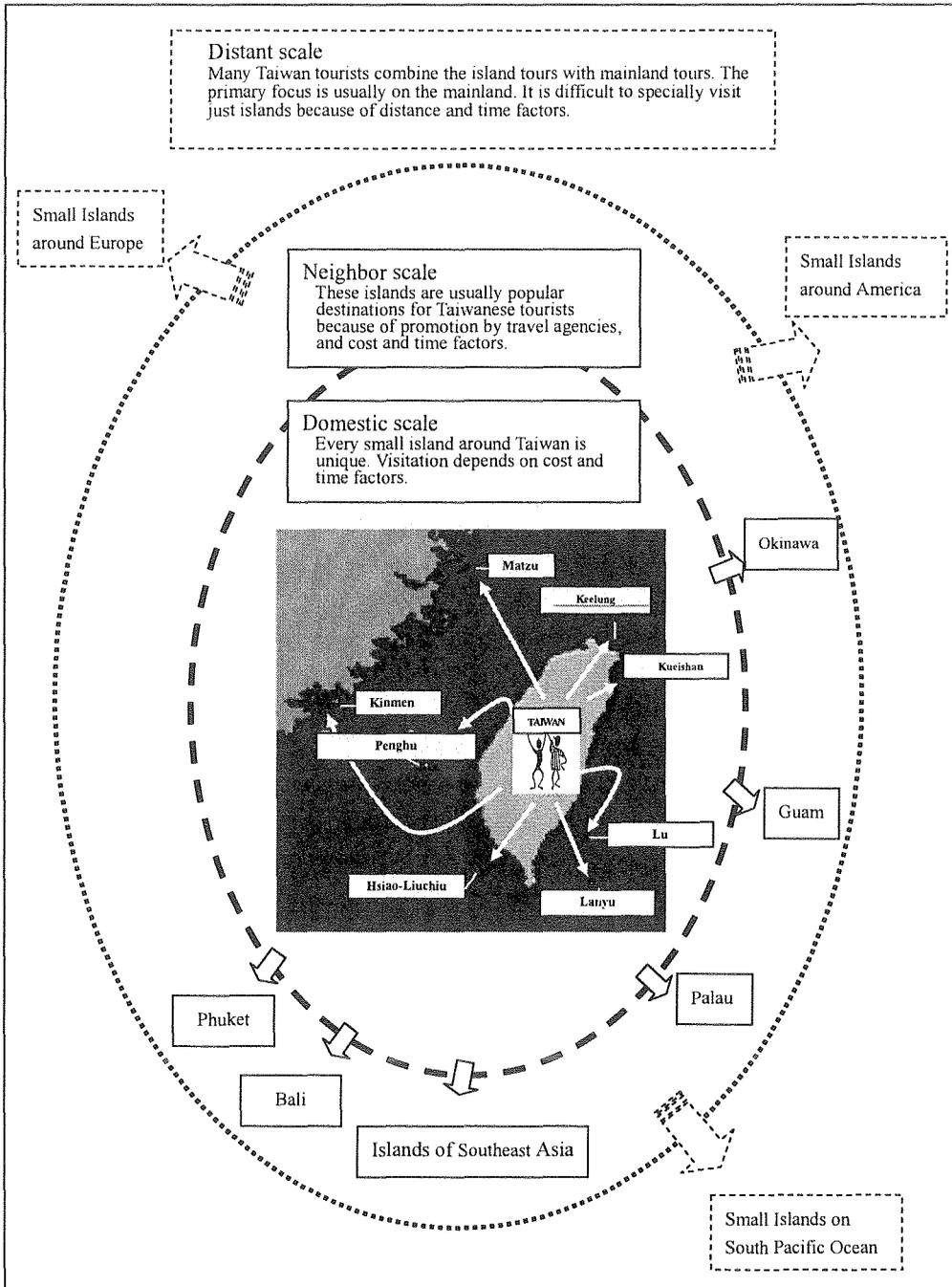
Time

For most Taiwan tourists, time is not only money but also a resource. Places distant from Taiwan need more flying time. A long travel time to reach a tour destination is a disadvantage for an ordinary tourist. Generally speaking, a tour to Southeast Asia will take about at least five days, whereas European tours occupy about ten days minimum. In Taiwan there are only two days off per week regularly. For a tourist, it is not easy to have more than two days off unless long weekends or a special arrangement for long vacation are available. Vacations for five-day tours are usually easier to arrange than ten-day tours. Since tourists treat time as a limited resource, tours which take more time are less competitive than short-term ones.

Expense

Tour costs may play a key role in making decision for tourists. For Taiwan tourists, the Penghu Islands and Phuket Island in Thailand are the two popular small island destinations because of their relatively low cost. The typical tourist will spend about US\$250 for a three-day tour to Penghu, and about US\$500 for a five-day visit to Phuket Island. The per diem cost for the two destinations is thus quite close. By

Figure 1: Different spatial scales of island tourism for Taiwan tourists.



contrast, it is more expensive to travel to distant islands. For example, a typical tour to Italy including the tour to the mainland and nearby islands costs about US\$1650 for ten days charged by Taiwan travel agency. The relatively low cost of domestic or nearby islands for Taiwan tourists is obvious. Hence, nearby island resorts in Asia are competitive with domestic small islands.

METHODOLOGY

Data sources

In order to obtain accurate and detailed information on tourism development for Taiwan's small islands, the following sources are utilized: Government documents—formal documents in the public sector provide insights into how the government develops and maintains tourism in Taiwan's small islands. Administrative organization, development strategies, and tourism policies are analyzed; Newspaper advertisements—gathering statistics on commercial advertisements in newspapers is a very good way to know the marketing approaches of travel agencies. The daily newspaper, *The China Times*, is selected as reasonably representative of the press in Taiwan and advertising information for the entire year of 2001 has been analyzed. The number of days on which there were ads for island tourism, and the titles (numbers) of those ads were counted. The amount of page space allocated to the ads was measured. The results were divided into two classes: domestic and neighbor islands. By comparing the two categories, we tried to infer the intentions and approaches of the private sector.

Questionnaire survey

In order to obtain the opinions of island tourists, a total of 311 tourists in Penghu were interviewed. The sampling period was a three-day weekend and two weekdays during the summer of 2001. Sampling was carried out at the airport in Penghu. Random sampling was used, selecting tourists who had checked in for departure for interviewing. Since there was about half an hour wait for boarding planes after check in, tourists were relatively free and willing to be interviewed. The questionnaire contained a variety of questions dealing with tour decision factors, length of tour, and destination alternatives. Quantitative analysis of the questionnaire results provided insights into tourism demands.

RESEARCH RESULTS: THE PUBLIC SECTOR PERSPECTIVE

All islands need special care because of their unique island characteristics. Establishment of infrastructure (e.g. transportation, communications, etc.) is a top

priority and the essential foundation for tourism development on most islands. The public sector plays the major role in most places for infrastructure development. Thus, study of the public sector is important in the study of island tourism. In the case of Taiwan, the public sector is involved, of course, only on the domestic islands, and hence only the domestic scale is analyzed here.

Present development

Since 1990 Taiwan's small islands have been rapidly changing in many ways. Lu Island's administrative level was changed to be administered by the East Coast National Scenic Area Administration in 1990. In 1995, Penghu was placed under the jurisdiction of the Penghu National Scenic Area Administration. The Kinmen Islands were likewise put under the authority of the newly created Kinmen National Park Administration in 1995. Matsu National Scenic Area Administration was set up in the Matsu Islands in 1999. In 1999, a similar Kueishan Island was also placed under the administration of the Northeast Coast National Scenic Area Administration. In 2000, Hsiao-Liuchiu Island became a part of the Tapeng Bay National Scenic Area. In short, most key small islands administration was transferred from local government to the central government in the last decade for the purpose of better protecting these islands and promoting their tourism development in a proper way. Hence, the last decade is viewed by many as the "golden ten years" for island tourism in Taiwan.

It is very important for development of these small islands to upgrade their administrative level. Because the central government has a larger budget than local government, the islands have access to greater resources. The development budget increased substantially for this purpose over these ten years, helping in spot construction, operation, and market promotion. While the budget afforded quantitative improvements, the quality of tourism opportunities also was raised as the private sector played a key role too.

Future development

In the past, tourism development was unstable. It relied on fragmented policies adopted by local governments, whose financial situation was so poor that tourism planning received low priority. Today, the administration of tourism development of most small islands in Taiwan is strongly influenced by the central government as described above. The institutions of scenic areas and national parks are formal legal organizations that specialize in developing tourism and protecting resources and natural environments. They allocate adequate budgets and professional manpower for comprehensive planning every year. They continuously play a major role in subsidizing the development of island tourism.

In the future, it will be a routine work for the central government to allocate budget and manpower in managing island tourism. Tourism facilities will be gradu-

ally improved step by step. Moreover, there are many jobs derived from tourism related construction. The public sector is becoming the most important agent for tourism development on Taiwan's small islands.

The case of Penghu

The Penghu Islands consists of sixty-four islands of various sizes scattered in the Taiwan Strait. All islands except Hua-yu are flat-topped basalt formations with extended and curved coastlines with bays. There are numerous rocky reefs along the islands' extremely complicated coastlines. Penghu's inhabitants have lived a very simple life by fishing and have adapted to their natural circumstances. The ritual activities held in commemoration of Matsu and Wangyeh abound in local color. These unique natural sceneries and abundant cultural views attract many visitors.

The Penghu National Scenic Area Administration (PNSAA) was set up in 1995. PNSAA is a branch of the Bureau of Tourism under the Ministry of Transportation and Communication in the Executive Yuan. This was the first time that the central government directly took over the development of tourism on Penghu Islands. During the period 1995-2004, the PNSAA allocated a budget of about NT\$200 million every year, which has ten times the amount invested by local government in the past. Tourism in Penghu thus made greater progress than ever before. In the first few years, a great deal of money was spent on the infrastructure of tourism facilities (e.g. administrative office buildings, renovation of existing spots, construction of new spots, etc.). Thus, the physical development of tourism in Penghu is much better right now than the planning of one's software (e.g. tourist information stops, activities holding, tourists services, etc.). Moreover, the local government, Penghu County, was also ambitious about future tourism development, in its effort to diversify and expand the local economy, which is based otherwise almost entirely on agriculture (farming and fishing). The county government upgraded the administrative level of tourism from the 'Tourism Office', one of the divisions of the Economic Affairs Bureau, to the 'Tourism Bureau', in 2000.

In order to investigate the contributions of local and central government, we checked all of the tourist attractions in Penghu, including public and private. We found that the most famous spots are all public—the Penghu Sea-Crossing Bridge, the Penghu Aquarium, West Fort, Kuan-yin-ting Park, Erkan Hamlet, and Shawei Bay in Chipei. The public sector has had a very significant impact on tourism development in the Penghu Islands. The follow-up question, then, is why has the private sector not expanded more in Penghu?

RESEARCH RESULTS: THE PRIVATE SECTOR PERSPECTIVE

The private sector, which includes travel agencies, hotels, restaurants, souvenir shops, and others, is also a vital component of tourism. Among them, travel agen-

cies are most noticeable in island tourism because of islands being geographically separated and relatively isolated, with the public often having insufficient information about them. Travel agencies take the uncertainty and work out of planning an island vacation, and can save money for tourists. Hence, an analysis of the marketing techniques of travel agencies is important to understanding the private sector.

Present development

There are no spatial constraints on marketing and promotion of travel agencies. According to our analysis of newspaper advertisements by travel agencies, we found two spatial scales—domestic small islands and foreign ones (here, by “foreign”, referring to those in neighboring Asian countries only). Tourist spots or resorts located on domestic and neighboring countries’ small islands are both promoted by Taiwan-based travel agencies. However, marketing strategies vary between the two types of islands.

On the domestic side, travel agencies usually put most small popular islands of Taiwan together to promote tourism. This strategy is meant to make more profits. Our findings show the following in detail: First, marketing of Penghu was very stable in terms of frequency of published days, number of ads, and amount of newspaper space for the ads. Second, Lu Island’s promotion was very active, especially in the amount of newspaper space. Third, Kinmen’s ads lasted the entire year in terms of frequency of published days and number of ads. Adding up the published days, numbers, and space for ads devoted to just these three islands, they accounted for 85 percent of all the island tour ads in the newspaper. These are the most popular tourist destinations. Fourth, travel agencies focused their attention on Kueishan Island more than Matsu. Fifth, the Hsiao-Liuchiu, Lanyu Island, and Keelung Island were almost nonexistent in travel agencies advertising efforts. Sixth, most of the islands’ ads were halted in winter, the northeast monsoon season, with the notable exception of Kinmen because of its historic cultural/military role and landscapes, not oceanic ones.

For neighboring foreign small islands, ads were more lavish than for domestic islands, on a scale of two times greater number of published days, 14 times in number of ads, and 20 times in amount of space. A major reason for this is that these foreign islands are located in the tropical zone, and hence may be visited year round. Moreover, these islands have great appeal to tourists from Taiwan, and that requires more marketing. The promotion of foreign island tours in newspaper ads means that travel agencies make more profit on those tours.

Future development

In the future, travel agencies will still adopt the same strategy in domestic small island tours, because the tourist population is more stable. The agencies hope that new selling points will appear after investment by the public sector in island tourism,

such as permitting casino gambling in Penghu and Kinman where some investors and local residents desired to set up, or constructing a traditional Ya-mei village on Lanyu Island to conserve the aboriginal culture. Features such as these will attract more tourists.

On the neighboring regional scale, travel agencies will continue to actively promote tourism to foreign islands. Five points are worth noting. First, the total number of tourists from Taiwan to visit foreign islands has high potential. Second, island resorts (e.g. Phuket or Bali) can become single destinations in tourist choices. Third, well-developed air service to these islands make such travel more convenient. Fourth, various activities on these islands, such as snorkeling, sightseeing, bird watching, etc. are attractive draws for Taiwan tourists. Fifth, the profit from foreign island tours is very good for travel agencies in Taiwan.

The case of Penghu

Penghu topped all of the domestic islands in terms of newspaper ads in 2001. Ads appeared on a total of 58 days, about 70 percent of all island tours' advertising. In terms of frequency of published ads, Penghu accounted for 36 percent of 288 ads for all domestic islands. In terms of newspaper space, Penghu's share came to about 33 percent of total ad space. It is clear that travel agencies regard Penghu as a popular destination for tours, accounting for at least one third of all domestic island touring.

As for travel agencies' marketing, the neighboring foreign islands were also compared with Penghu in newspaper ads. The foreign islands had three times the number of published days, 40 times the number of ads, and 60 times the newspaper space. Obviously, the foreign islands around Taiwan are intensively promoted by the travel agencies, perhaps partly because per diem costs for tours to these islands are somewhat higher than per diem costs for Taiwan's domestic islands.

RESEARCH RESULTS: THE TOURIST DEMAND PERSPECTIVE

In this study, tourist opinions and the differences between their choices of domestic and foreign islands were investigated.

Present development

During the period, 1997-2001, the annual number of tourists who visited Penghu was 420,000-460,000. Kinmen received a total of about 400,000, and Lu Island 270,000-300,000. According to the available data, these numbers have not significantly changed in recent years. In other words, the demand is strong and fairly constant or steady. Analyzing why tourists were interested in visiting the small islands, we sampled a total of 311 tourists to Penghu with a questionnaire. We found that

over half (53 percent) of the respondents had visited other islands before they visited Penghu. Other islands visited in terms of frequency, from greatest to smallest numbers, were Hsiao-Liuchiu, Lu, and Kinmen. Another finding was that the tourists did not mind somewhat inconvenient transportation and simple accommodations while visiting the domestic islands.

The reasonable cost of travel attracted many Taiwan tourists to visit neighboring foreign islands. Their interest in such travel had increased because of the tour costs. Time also was a critical factor in their decision to visit domestic or foreign islands. Foreign tours take more time than domestic tours. Hence the foreign trips normally can occur only on formal vacation periods, but the latter often take place just on weekends. We found a wide gap among respondents between wishing to visit foreign islands and actually doing so. This undoubtedly also explains part of the large advertising effort by travel agencies for foreign tours.

Future development

Respondents' ranking of destinations on domestic islands, with the exception of Penghu, was (in descending order): Lu, Lanyu, Kinmen, Hsiao-Liuchiu, Matzu, Kueishan, and Keelung. Just 10 percent of the respondents had no wish to travel to other islands after visiting Penghu. We can assume that the domestic islands could attract many more people who had never been there before, especially young people. We also asked respondents that, if they had more free days, would they take foreign island tours. A bare majority (50.5 percent) said they would not. They had no desire to go abroad, even if there were time. This suggests that the domestic islands have an adequate and relatively stable base of tourists to draw upon.

However, almost one half of the respondents did say they intended to travel to neighboring foreign islands, if they had the time. To go abroad, they said they would do their best to arrange five-day vacations. Of course, it also is possible that some of the tourists who visit domestic islands and said they do not wish to go to foreign sites might change their minds after having a good experience in a domestic tour. Indeed, it is likely that demand by Taiwan tourists for visits to neighboring foreign islands will increase steadily.

The case of Penghu

Penghu has become a famous small island paradise for Taiwan tourists since 1960. Recently, the total number of tourists visiting Penghu has been very stable, in the mid-400,000s. In our analysis, we found that 47 percent of respondents selected Penghu as their first choice of domestic islands to visit. Another 38 percent of the respondents would want to stay longer in Penghu if they had more time. Thus, in competition between domestic and foreign islands, Penghu stands in an advantageous position. Tourism is not only steady here, but prosperous.

In terms of predicting Penghu's future development, possible ideas planned by

local government, including casino districts, duty-free shopping, and preferential trade zones across the Taiwan Strait were asked about in the questionnaire also. As we know, using casinos is a good way around the world to boost revenues and attract tourists, but it is illegal in Taiwan at present stage. The establishment of duty-free shops and preferential trade zones is good for Penghu, but is still in the planning stage by the central government. The sampled tourists indicated their most interest in having duty-free shopping districts, but were also attracted by the relaxed atmosphere in Penghu, and possible trade districts and casinos. Shopping opportunities were the most important to most tourists, while casino gambling was not a high priority to them. In fact, most did not have strong feelings about development planning in general, preferring Penghu the way it is now.

Because Penghu is in a commanding position among domestic islands for Taiwan tourists, it really has nothing to fear from other domestic islands. Foreign islands are another matter, however, as they could become competitors with Penghu. It likely will be necessary to increase creative tourist activities on Penghu and improve the quality of tourism there to maintain competitiveness.

CONCLUSION

From the previous discussion of past, present, and future developments in small island tourism, this paper has analyzed the differences between domestic islands and neighboring foreign islands for tourism development. The research results from the regional perspective can be summarized as follows:

Domestic scale

On the domestic scale, three conclusions can be made about the relationship among the islands:

1. Island tourists have a low probability of revisiting a specific island, because of the isolation of the islands. In previous research studies, less than 40 percent of respondents revisited Penghu (PNSAA, 1993; PNSAA, 1998; Ni, 2000b).
2. Formal statistical data show that the annual total of visitors to Lu Island increased from 100,000-200,000 in the 1992-96 period to 270,000-300,000 in the 1997-2001 period. This was very strong growth. However, the annual number of visitors to Penghu and Kinmen was relatively stable in these periods.
3. After analyzing the results from the sampled tourists in this study, some 90 percent of the respondents were interested in traveling to another island after visiting Penghu. It can be concluded that tourism in Taiwan's domestic islands is in a condition of what we call 'spatial alternation,' i.e., tourists are willing to visit one island after another.

Neighboring foreign scale

On the neighboring foreign scale, three observations can be made:

1. The tourist industry in foreign islands is highly internationalized and famous for good service. Those islands also attract Taiwan tourists because of convenient air service;
2. The relatively low tour costs to foreign islands could affect Taiwan tourists' willingness to visit domestic islands;
3. Tourism development in Taiwan's small islands and foreign islands is in a condition described as 'regional competition.' In other words, neighboring islands offer alternatives to Taiwan tourists seeking something more exotic in their island travel.

In conclusion, the most important property for every small island seeking to develop tourism is visibility. The island needs to be visible to the central government, so that it shares in governmental investment for development of tourism. The island also needs to be visible to travel agencies, which will bring the island into the international market and help make it a popular tourist destination. The island also needs to be visible to tourists, who must be enticed to visit the island. Thus, government, travel agencies, and tourists interact with each other in the development of island tourism. In the case of Penghu, the islands are highly visible to Taiwan's central government, domestic travel agencies, and Taiwan tourists, but much less so among international travel agencies and foreign tourists. The Penghu Islands thus appear to have a bright future for domestic tourism, but much needs to be promoted to put the islands 'on the map', so to speak, internationally.

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