



GUAM VISITORS BUREAU

Taiwan Visitor Tracker Exit Profile

FY2014 Market Segmentation

2nd Qtr. (JAN~MAR 2014)



Prepared by: QMark Research

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Background & Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Chinese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **150** departing Taiwanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **150** is +/- 8.0 percentage points with a 95% confidence level. That is, if all Taiwanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 8.0 percentage points.

OBJECTIVES

- **The specific objectives of the analysis were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - General leisure group
 - Family and/or Child
 - Special interest group
 - Incentive market
 - 20-40 year old
 - Mid-high level income
 - White-collar
 - w/ child
 - Wedding/ Honeymoon
 - Student
 - To identify (for all Taiwanese visitors) the most important determinants of on-island spending; and
 - To identify the most significant factors affecting overall visitor satisfaction.

Highlighted Segments

Parameters

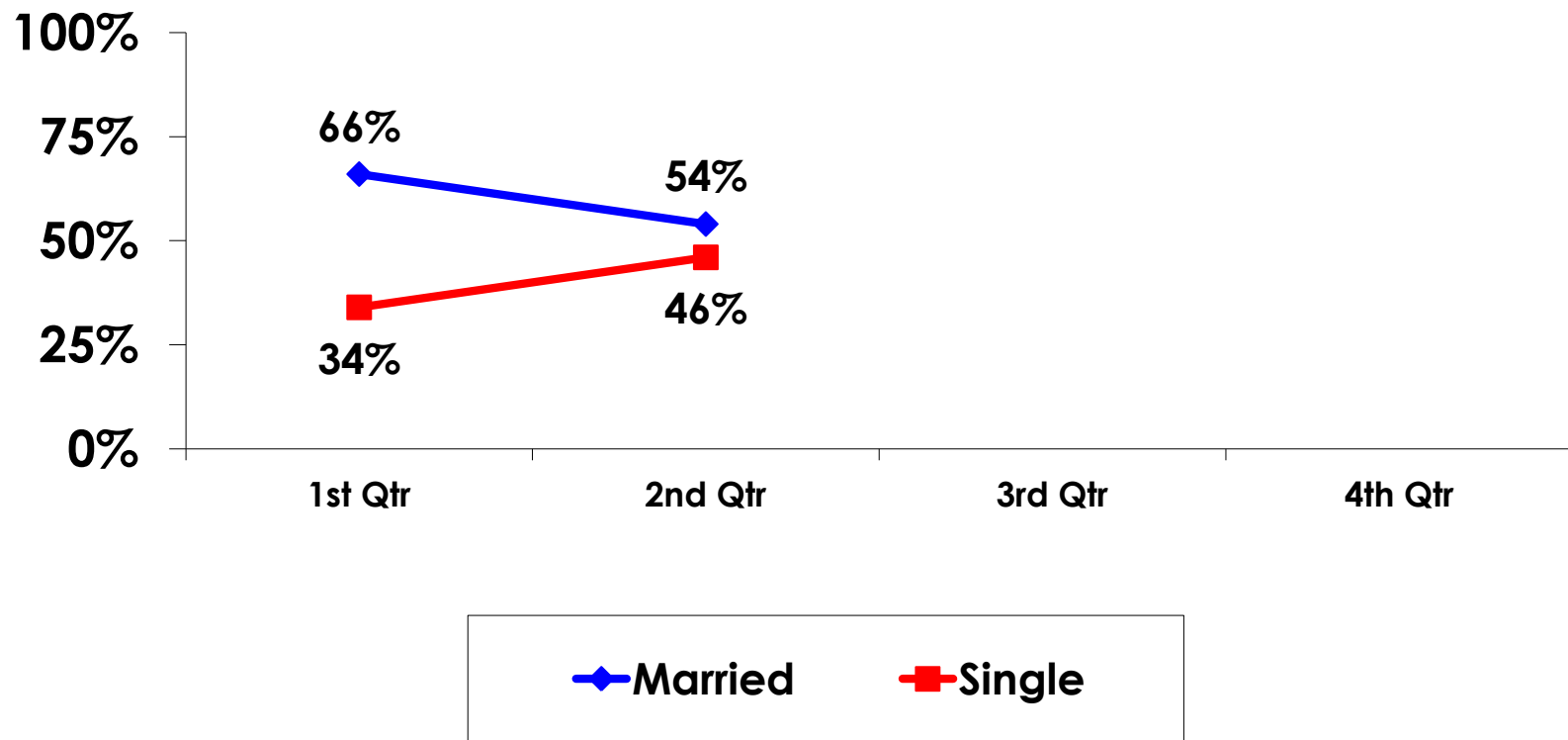
- General leisure group – Q.5A
- Family and/or Child – Q.6
- Special interest group – Q.18/Q7
- Incentive market – Q.5A/Q.7
- 20-40 year old – Q.F
- Mid-high level income – Q.26
- White-collar – Q.25
- W/child – Q.6
- Wedding/ Honeymoon – Q.5A/ Q.13
- Student –Q.25

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
General leisure group	27%	37%		
Child	17%	9%		
Incentive market	3%	6%		
Male 20-40	43%	44%		
Female 20-40	33%	41%		
White collar	46%	51%		
Wedding/ Honeymooner	5%	8%		
Student	6%	4%		
Mid-High income	45%	42%		
TOTAL	150	150		

SECTION 1 **PROFILE OF RESPONDENTS**

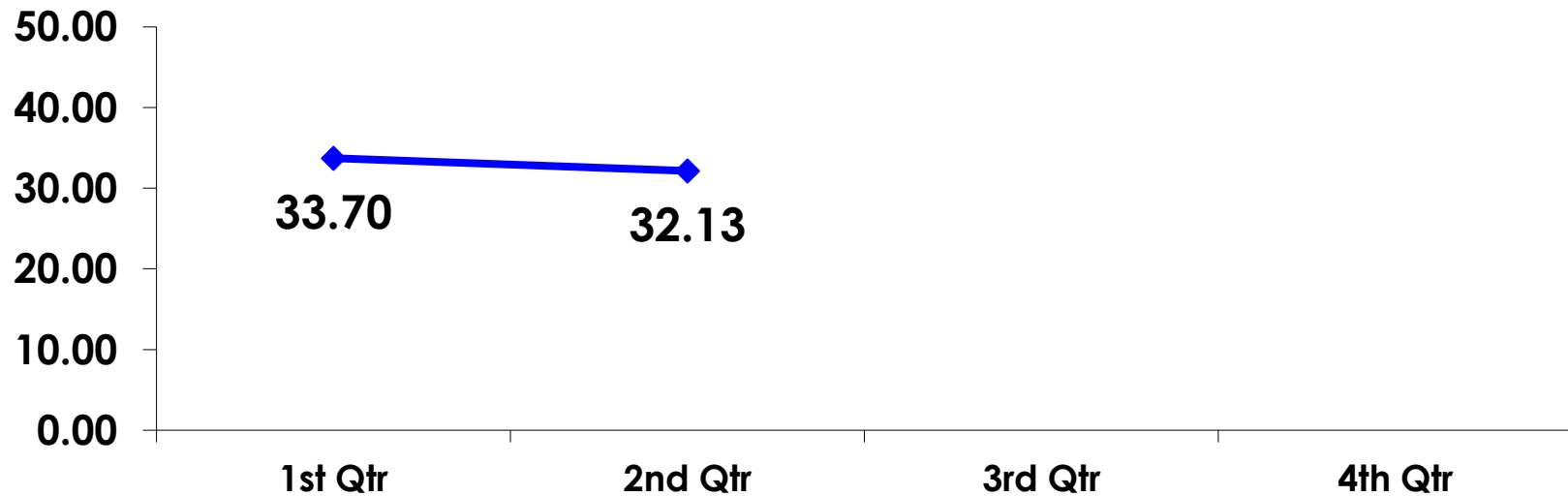
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
QE	Married	Count	80	24	12	5	34	25	43	10	0	33
		Column N %	54%	44%	92%	56%	52%	40%	57%	83%	0%	53%
	Single	Count	69	30	1	4	31	37	33	2	6	29
		Column N %	46%	56%	8%	44%	48%	60%	43%	17%	100%	47%
Total		Count	149	54	13	9	65	62	76	12	6	62

AVERAGE AGE - TRACKING



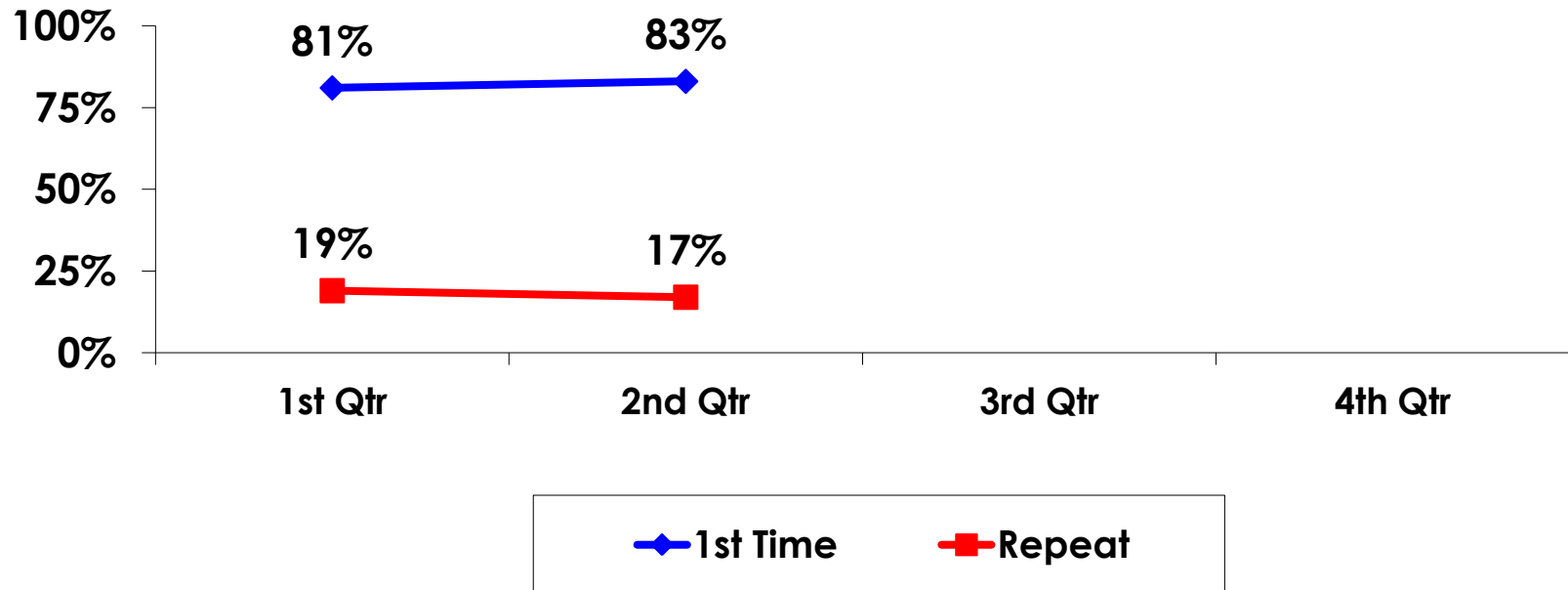
AGE- SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	12	5	1	0	5	7	3	0	5	3
		Column N %	8%	9%	8%	0%	8%	11%	4%	0%	83%	5%
	25-34	Count	97	40	5	4	48	49	57	11	1	46
		Column N %	65%	73%	38%	44%	73%	79%	75%	92%	17%	73%
	35-49	Count	36	10	7	4	13	6	15	1	0	13
		Column N %	24%	18%	54%	44%	20%	10%	20%	8%	0%	21%
	50+	Count	5	0	0	1	0	0	1	0	0	1
		Column N %	3%	0%	0%	11%	0%	0%	1%	0%	0%	2%
	Total	Count	150	55	13	9	66	62	76	12	6	63
QF	Mean		32.13	30.51	36.54	35.78	30.00	29.03	31.38	31.42	22.33	31.65
	Median		29	29	35	36	29	29	30	30	22	29

INCOME - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
Q26	<=NT160K	Count	6	2	0	0	4	2	3	0	1	0
		Column N %	5%	4%	0%	0%	8%	4%	5%	0%	20%	0%
	NT160K-NT200K	Count	7	5	0	0	3	4	3	2	0	0
		Column N %	6%	10%	0%	0%	6%	9%	5%	17%	0%	0%
	NT200K-NT400K	Count	14	6	0	1	4	9	7	1	0	0
		Column N %	13%	12%	0%	20%	8%	19%	11%	8%	0%	0%
	NT400K-NT600K	Count	30	15	2	2	17	10	20	4	1	30
		Column N %	27%	31%	20%	40%	33%	21%	30%	33%	20%	48%
	NT600K-NT800K	Count	33	12	4	1	11	17	21	3	1	33
		Column N %	29%	24%	40%	20%	22%	36%	32%	25%	20%	52%
	NT800K-NT1.0M	Count	8	3	2	0	6	1	6	2	0	0
		Column N %	7%	6%	20%	0%	12%	2%	9%	17%	0%	0%
	NT1.0M+	Count	13	6	2	1	5	4	6	0	1	0
		Column N %	12%	12%	20%	20%	10%	9%	9%	0%	20%	0%
	No Income	Count	1	0	0	0	1	0	0	0	1	0
		Column N %	1%	0%	0%	0%	2%	0%	0%	0%	20%	0%
	Total	Count	112	49	10	5	51	47	66	12	5	63

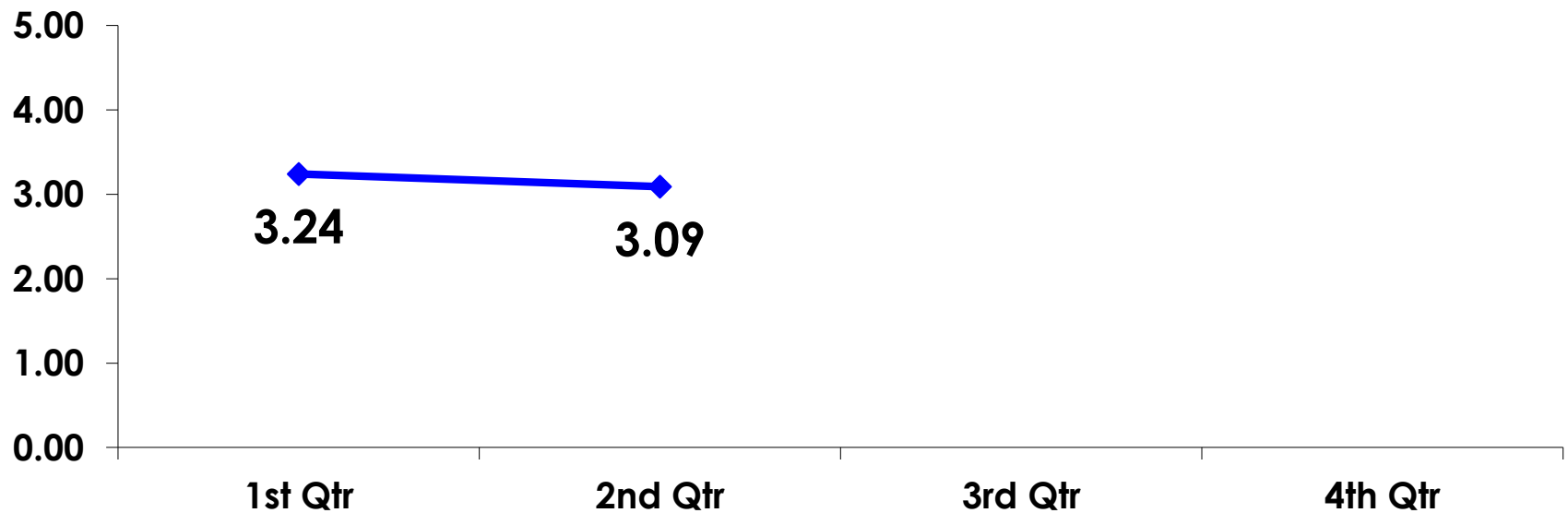
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	124	51	11	5	55	57	68	12	5	55
		Column N %	83%	93%	85%	56%	83%	92%	89%	100%	83%	87%
	No	Count	26	4	2	4	11	5	8	0	1	8
		Column N %	17%	7%	15%	44%	17%	8%	11%	0%	17%	13%
Total		Count	150	55	13	9	66	62	76	12	6	63

AVG LENGTH OF STAY - TRACKING



AVG LENGTH OF STAY - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
Q8	Mean	3.09	3.17	3.15	3.00	3.17	3.00	3.07	3.17	3.17	3.21
	Median	3	3	3	3	3	3	3	3	3	3

SECTION 2 **TRAVEL PLANNING**

TRAVEL PLANNING - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
Q7	Full package tour	Count	24	16	3	0	9	15	13	2	3	8
		Column N %	16%	29%	23%	0%	14%	24%	17%	17%	60%	13%
	Free-time package tour	Count	52	20	7	1	27	21	24	6	1	25
		Column N %	35%	36%	54%	11%	42%	34%	32%	50%	20%	40%
	Individually arranged travel (FIT)	Count	60	16	3	0	24	22	32	3	1	26
		Column N %	40%	29%	23%	0%	37%	35%	42%	25%	20%	41%
	Group tour	Count	4	2	0	0	3	1	3	1	0	1
		Column N %	3%	4%	0%	0%	5%	2%	4%	8%	0%	2%
	Company paid travel	Count	8	1	0	8	2	3	4	0	0	3
		Column N %	5%	2%	0%	89%	3%	5%	5%	0%	0%	5%
	Other	Count	1	0	0	0	0	0	0	0	0	0
		Column N %	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Total	Count	149	55	13	9	65	62	76	12	5	63

TRAVEL MOTIVATION - SEGMENTATION

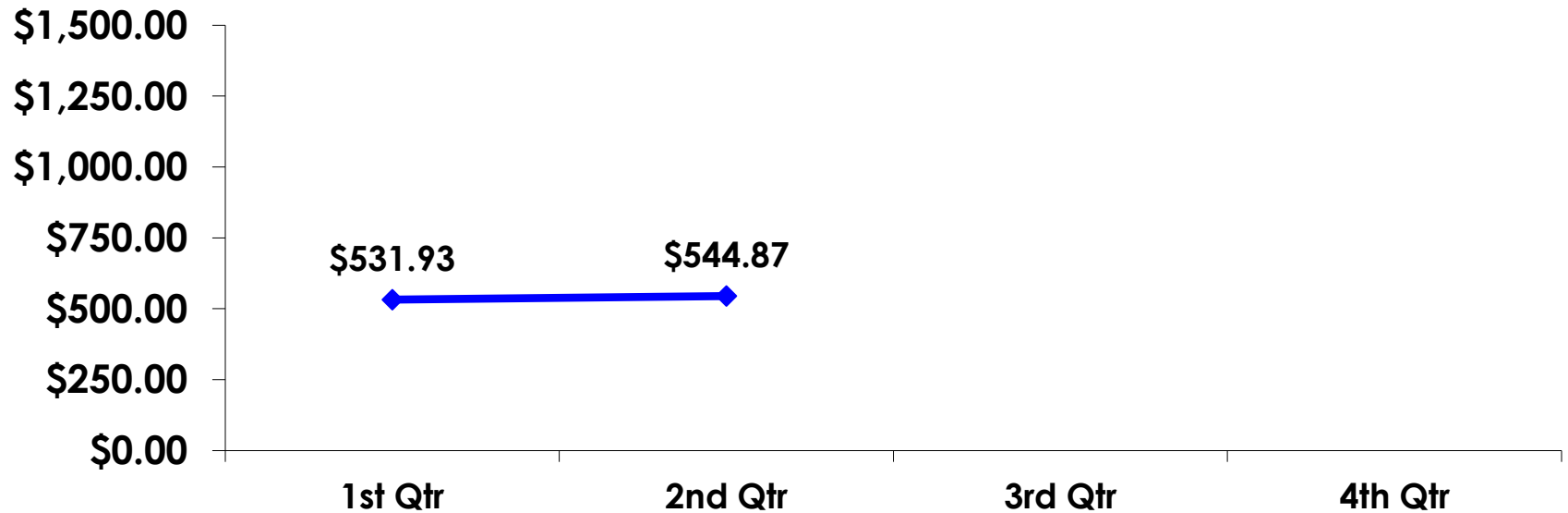
		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME	
		-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	4%	5%	0%	0%	5%	3%	1%	0%	0%	2%	
	Price	17%	18%	8%	0%	14%	20%	17%	25%	0%	15%	
	Visit friends/ Relatives	3%	2%	8%	0%	2%	3%	1%	0%	0%	2%	
	Recomm- friend/family/trvl agnt	15%	24%	15%	22%	11%	20%	18%	8%	0%	18%	
	Scuba	11%	15%	8%	0%	12%	10%	9%	0%	50%	11%	
	Water sports	12%	22%	15%	11%	17%	11%	12%	8%	50%	11%	
	Short travel time	9%	16%	0%	0%	15%	5%	8%	33%	17%	8%	
	Golf	6%	2%	15%	0%	5%	2%	7%	0%	0%	6%	
	Relax	33%	89%	31%	11%	36%	36%	41%	33%	33%	39%	
	Company/ Business Trip	8%	2%	0%	11%	5%	5%	3%	0%	17%	5%	
	Company Sponsored	1%	0%	0%	22%	2%	2%	0%	0%	0%	2%	
	Convention/ Trade/ Conference	2%	0%	0%	33%	2%	0%	1%	0%	0%	2%	
	Safe	19%	29%	15%	0%	20%	21%	16%	25%	33%	18%	
	Natural beauty	51%	62%	38%	33%	50%	64%	49%	67%	83%	47%	
	Shopping	27%	40%	15%	22%	24%	33%	25%	33%	33%	24%	
	Married/ Attn wedding	1%	2%	0%	0%	2%	0%	1%	17%	0%	2%	
	Honeymoon	7%	7%	0%	0%	15%	2%	11%	92%	0%	10%	
	Pleasure	7%	20%	0%	0%	5%	11%	11%	0%	33%	10%	
	No Visa requirement	30%	40%	23%	0%	30%	33%	26%	42%	67%	31%	
	Other	2%	2%	0%	11%	2%	3%	4%	0%	0%	2%	
	Total	Count	149	55	13	9	66	61	76	12	6	62

INFORMATION SOURCES - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20- 40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME	
		-	-	-	-	-	-	-	-	-	-	
Q1	Internet	52%	51%	46%	67%	61%	42%	50%	58%	33%	52%	
	Friend/ Relative	35%	31%	38%	22%	32%	42%	34%	25%	33%	33%	
	TV	21%	31%	31%	33%	15%	24%	18%	33%	33%	17%	
	Co-Worker/ Company Trvl Dept	17%	18%	15%	33%	15%	21%	21%	8%	0%	14%	
	Travel Agent Brochure	15%	24%	15%	0%	12%	21%	12%	8%	33%	17%	
	Magazine (Consumer)	14%	16%	15%	11%	17%	10%	18%	25%	0%	10%	
	Prior Trip	13%	7%	15%	33%	12%	8%	7%	0%	0%	10%	
	Travel Guidebook- Bookstore	9%	9%	8%	0%	15%	3%	13%	17%	17%	6%	
	Consumer Trvl Show	8%	11%	8%	0%	9%	8%	7%	17%	0%	5%	
	Newspaper	7%	9%	8%	11%	8%	6%	7%	8%	17%	8%	
	Travel Trade Show	6%	11%	0%	11%	3%	8%	4%	8%	0%	6%	
	GVB Promo	6%	13%	0%	0%	9%	5%	7%	8%	0%	3%	
	Other	2%	4%	0%	0%	2%	3%	1%	8%	33%	2%	
	Radio	2%	4%	8%	0%	2%	3%	1%	0%	0%	0%	
	Theater Ad	1%	0%	0%	0%	2%	0%	0%	0%	17%	0%	
	GVB Office	1%	2%	0%	0%	2%	0%	0%	0%	0%	0%	
	Total	Count	150	55	13	9	66	62	76	12	6	63

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING

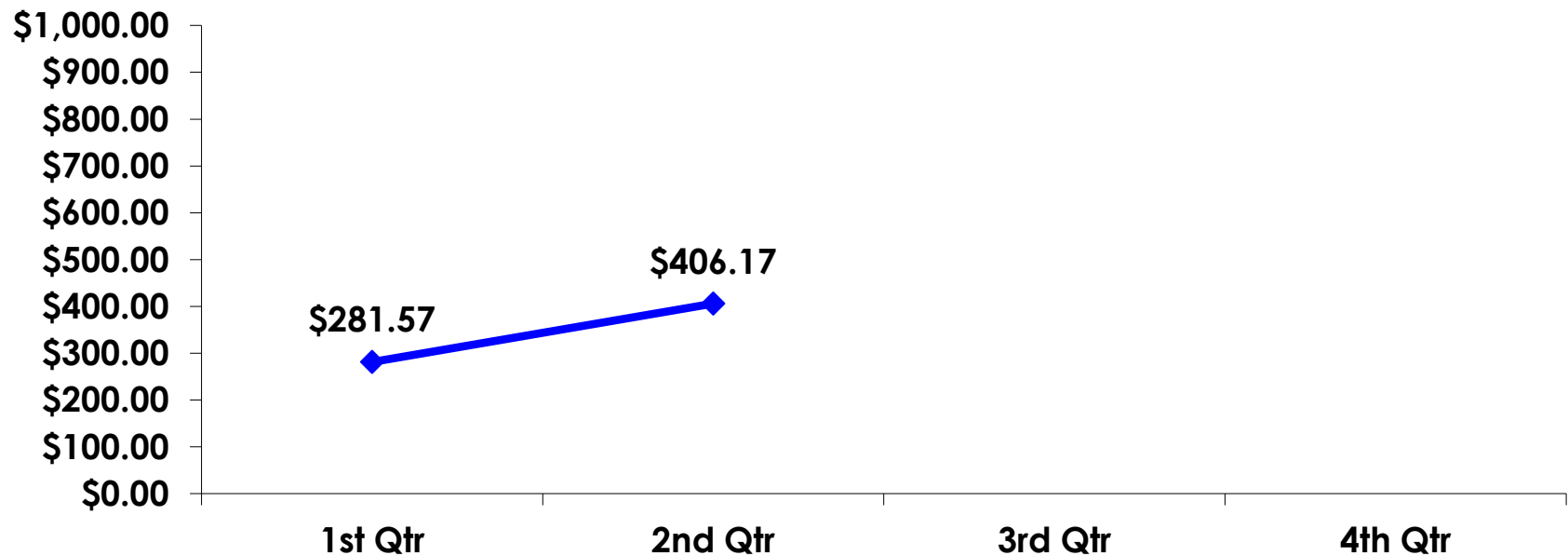


YTD=\$538.40

PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$544.87	\$747.90	\$258.23	\$253.28	\$533.15	\$633.19	\$539.87	\$730.83	\$465.26	\$471.90
	Median	\$573	\$826	\$0	\$0	\$578	\$606	\$519	\$619	\$347	\$0
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,304	\$2,643	\$1,097	\$892	\$2,081	\$2,643	\$2,643	\$2,510	\$1,107	\$3,304

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$343.87

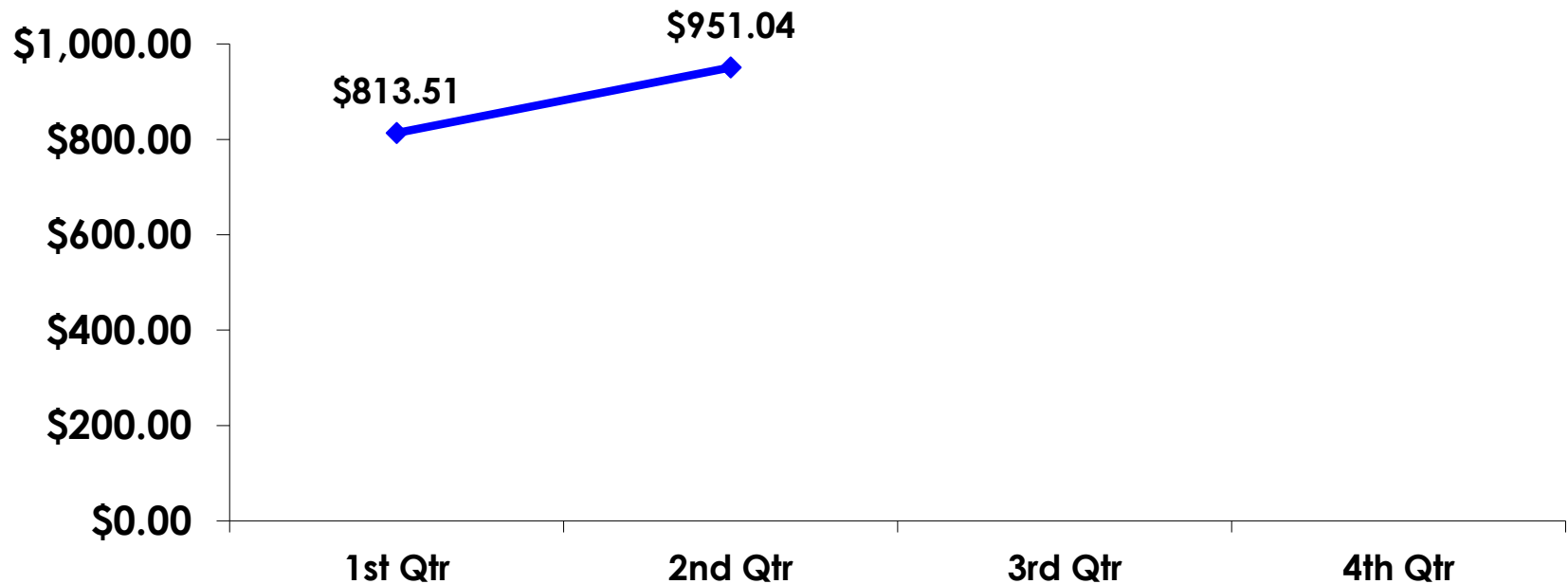
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$406.17	\$470.21	\$156.08	\$208.89	\$410.19	\$339.05	\$304.83	\$381.17	\$231.11	\$486.29
	Median	\$222	\$375	\$0	\$180	\$208	\$300	\$235	\$295	\$250	\$250
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,700	\$2,266	\$667	\$650	\$2,000	\$2,266	\$1,800	\$1,960	\$390	\$5,700

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$727.22	\$836.22	\$991.08	.	\$790.94	\$654.11	\$691.19	\$1,651.80	.	\$809.38
	Median	\$694	\$760	\$991	.	\$743	\$603	\$727	\$1,652	.	\$677
	Minimum	\$479	\$479	\$991	.	\$496	\$479	\$496	\$1,652	.	\$496
	Maximum	\$1,652	\$1,652	\$991	.	\$1,652	\$908	\$908	\$1,652	.	\$1,652
AIR/ HOTEL/ MEAL	Mean	\$1,254.09	\$1,154.16	\$1,592.17	\$759.83	\$1,173.11	\$1,271.38	\$1,104.10	\$1,854.43	\$991.08	\$1,256.52
	Median	\$991	\$910	\$1,513	\$892	\$1,082	\$892	\$1,089	\$1,321	\$991	\$1,082
	Minimum	\$496	\$568	\$1,097	\$496	\$496	\$496	\$496	\$727	\$991	\$568
	Maximum	\$5,019	\$2,643	\$2,246	\$892	\$1,982	\$5,019	\$1,982	\$5,019	\$991	\$3,304
AIR ONLY	Mean	\$594.65	.	.	.	.	\$594.65	.	.	.	\$594.65
	Median	\$595	.	.	.	.	\$595	.	.	.	\$595
	Minimum	\$595	.	.	.	.	\$595	.	.	.	\$595
	Maximum	\$595	.	.	.	.	\$595	.	.	.	\$595
HOTEL ONLY	Mean	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.
	Minimum	.	.	.	.	.	.	.	.	.	.
	Maximum	.	.	.	.	.	.	.	.	.	.
HOTEL & MEAL	Mean	\$991.08	\$991.08	.	.	\$991.08	.	\$991.08	.	.	.
	Median	\$991	\$991	.	.	\$991	.	\$991	.	.	.
	Minimum	\$991	\$991	.	.	\$991	.	\$991	.	.	.
	Maximum	\$991	\$991	.	.	\$991	.	\$991	.	.	.
F&B HOTEL	Mean	\$49.55	\$49.55	.	.	\$49.55	.	.	.	.	.
	Median	\$50	\$50	.	.	\$50	.	.	.	.	.
	Minimum	\$50	\$50	.	.	\$50	.	.	.	.	.
	Maximum	\$50	\$50	.	.	\$50	.	.	.	.	.
TRANS- TAIWAN	Mean	\$70.52	\$26.24	\$99.11	.	\$35.51	\$90.52	\$112.39	.	\$16.52	\$31.96
	Median	\$20	\$17	\$99	.	\$33	\$17	\$46	.	\$17	\$28
	Minimum	\$6	\$9	\$99	.	\$10	\$6	\$9	.	\$17	\$6
	Maximum	\$421	\$66	\$99	.	\$66	\$421	\$421	.	\$17	\$66
TRANS- GUAM	Mean	\$67.49	\$47.35	\$99.11	.	\$21.47	\$74.33	\$61.45	.	.	\$66.07
	Median	\$66	\$66	\$99	.	\$21	\$66	\$66	.	.	\$66
	Minimum	\$10	\$10	\$99	.	\$10	\$66	\$10	.	.	\$66
	Maximum	\$132	\$66	\$99	.	\$33	\$99	\$132	.	.	\$66
OPT TOURS	Mean	\$418.90	\$517.14	\$58.80	.	\$616.67	\$259.12	\$421.21	\$264.29	\$693.76	\$360.09
	Median	\$165	\$264	\$59	.	\$264	\$83	\$215	\$264	\$694	\$264
	Minimum	\$50	\$66	\$59	.	\$50	\$59	\$50	\$264	\$694	\$66
	Maximum	\$1,652	\$1,652	\$59	.	\$1,652	\$694	\$1,652	\$264	\$694	\$694
OTHER	Mean	\$609.56	\$723.71	.	.	\$555.93	\$664.68	\$662.56	.	\$396.43	\$667.99
	Median	\$595	\$727	.	.	\$512	\$529	\$611	.	\$396	\$661
	Minimum	\$33	\$33	.	.	\$149	\$33	\$33	.	\$396	\$33
	Maximum	\$1,652	\$1,652	.	.	\$1,493	\$1,652	\$1,652	.	\$396	\$1,493
TOTAL	Mean	\$742.25	\$993.24	\$585.91	\$253.28	\$752.54	\$838.57	\$765.49	\$1,241.43	\$465.26	\$633.49
	Median	\$661	\$826	\$0	\$0	\$740	\$743	\$723	\$1,074	\$347	\$0
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,019	\$2,673	\$2,445	\$892	\$2,673	\$5,019	\$2,673	\$5,019	\$1,107	\$3,304

TOTAL EXPENDITURES – TRACKING



YTD=\$882.27

TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$951.04	\$1,218.11	\$414.31	\$462.16	\$943.34	\$972.25	\$844.70	\$1,112.00	\$696.37	\$958.19
	Median	\$686	\$1,126	\$167	\$180	\$766	\$981	\$708	\$952	\$662	\$668
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$9,004	\$3,652	\$1,637	\$1,542	\$3,652	\$3,644	\$3,644	\$3,612	\$1,497	\$9,004

SECTION 4 **ADVANCED STATISTICS**

ANALYSIS TECHNIQUE

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ($p < .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Comparison of Drivers of Overall Satisfaction, 1st, 2nd Qtr and Overall 1-2 Qtr 2014			
Drivers:	1st Qtr	2nd Qtr	Combin ed 1-2 Qtr 2014
	rank	rank	rank
Quality & Cleanliness of beaches & parks	4	3	3
Ease of getting around			
Safety walking around at night			
Quality of daytime tours	3		4
Variety of daytime tours		1	5
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping	2		1
Variety of shopping			
Price of things on Guam			
Quality of hotel accommodations	1	2	2
Quality/cleanliness of air, sky			
Quality/cleanliness of parks		4	
Quality of landscape in Tumon			
Quality of landscape in Guam			
Quality of ground handler			
Quality/cleanliness of transportation vehicles			
% of Per Person On Island Expenditures Accounted For	37.0%	43.9%	38.9%
NOTE: Only significant drivers are included.			

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by four significant factors in the Second Quarter 2014 Period. By rank order they are:
 - **Variety of day time tours,**
 - **Quality of hotel accommodations,**
 - **Quality & cleanliness of beaches & parks, and**
 - **Quality/cleanliness of parks.**
- With these four factors the overall r^2 is .439, meaning that **43.9% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On Isle Expenditure, 1st,2nd Qtr and Overall 1-2 Qtr 2014			
	1st Qtr	2nd Qtr	Combin ed 1-2
Drivers:	rank	rank	Qtr rank
Quality & Cleanliness of beaches & parks			
Ease of getting around			
Safety walking around at night			
Quality of daytime tours			
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping			
Variety of shopping			
Price of things on Guam			
Quality of hotel accommodations			
Quality/cleanliness of air, sky	1	1	1
Quality/cleanliness of parks			
Quality of landscape in Tumon			
Quality of landscape in Guam			
Quality of ground handler			
Quality/cleanliness of transportation vehicles			
% of Per Person On Island Expenditures Accounted For	6.9%	14.3%	10.2%
NOTE: Only significant drivers are included.			

Drivers of Per Person On Island Expenditure

Per person on island expenditure is driven by one significant factor during the second quarter 2014 period. That factor is:

- **Quality/cleanliness of air, sky.**
- With this factor the overall r^2 is .143, meaning that **14.3% of per person on island expenditure is accounted for by this factor.**