



GUAM VISITORS BUREAU

Taiwan Visitor Tracker Exit Profile

1st Qtr (Oct. 2011 ~ Dec. 2011)



Prepared by: QMark Research

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Background & Methodology

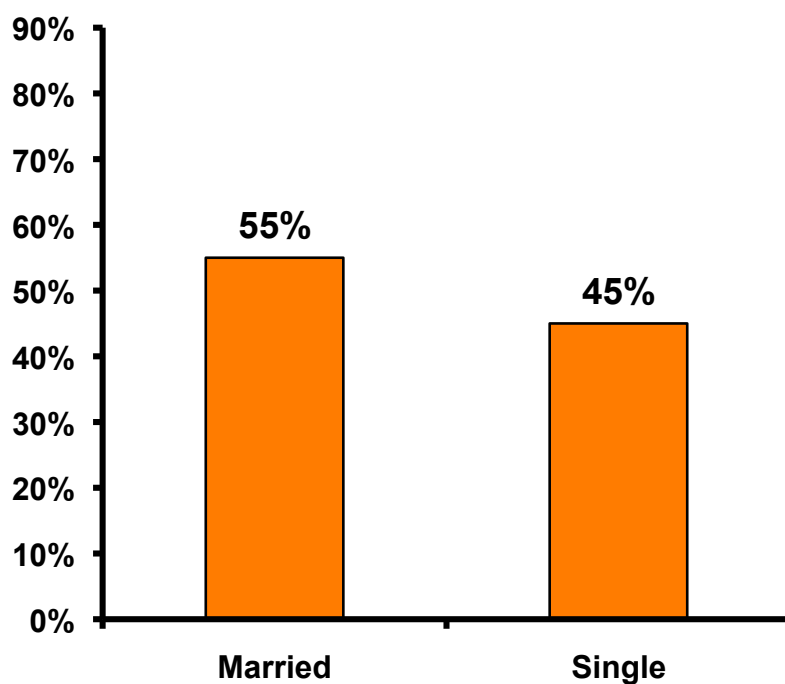
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Chinese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **154** departing Taiwanese 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 **154** is +/- 8.00 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 +/- 8.00 percentage points.

Objectives

- To monitor the effectiveness of the Taiwanese seasonal campaigns in attracting Taiwanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Taiwanese marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

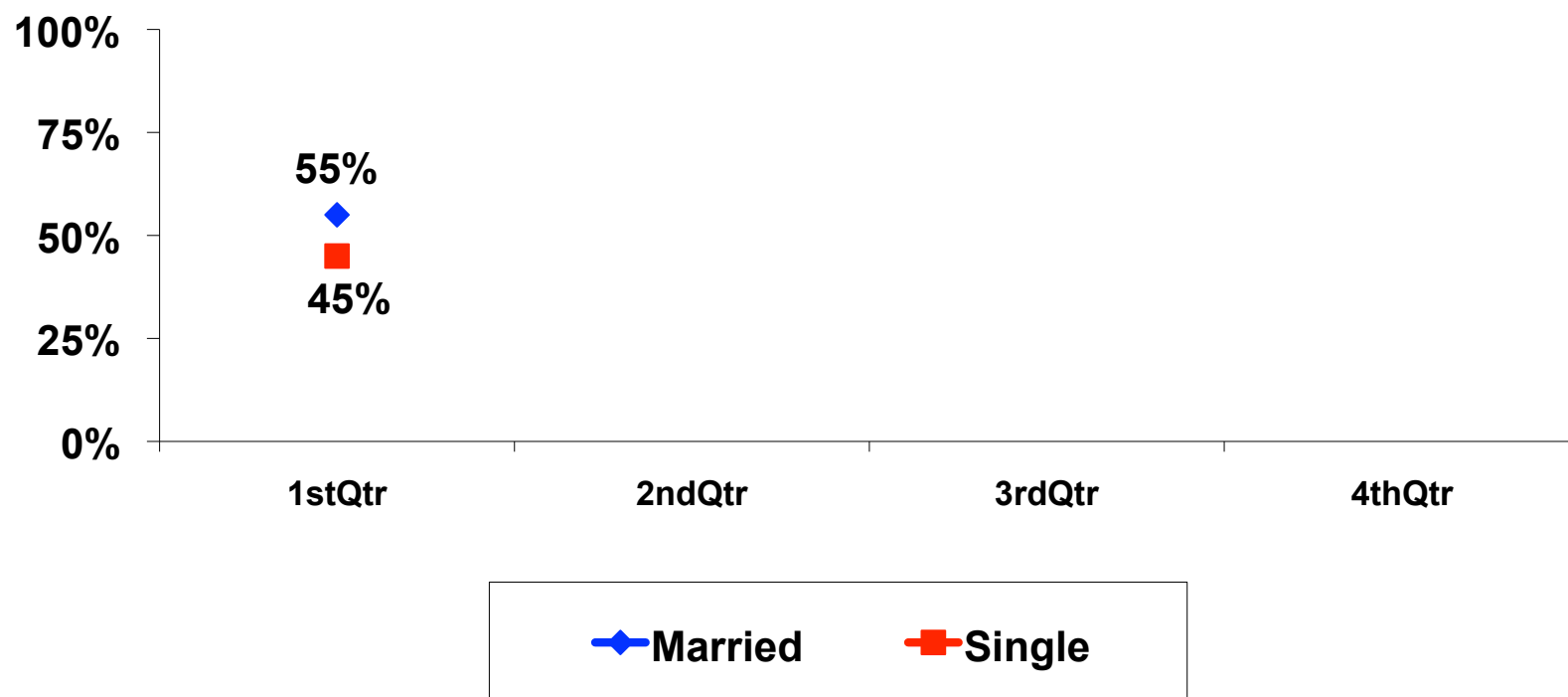
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

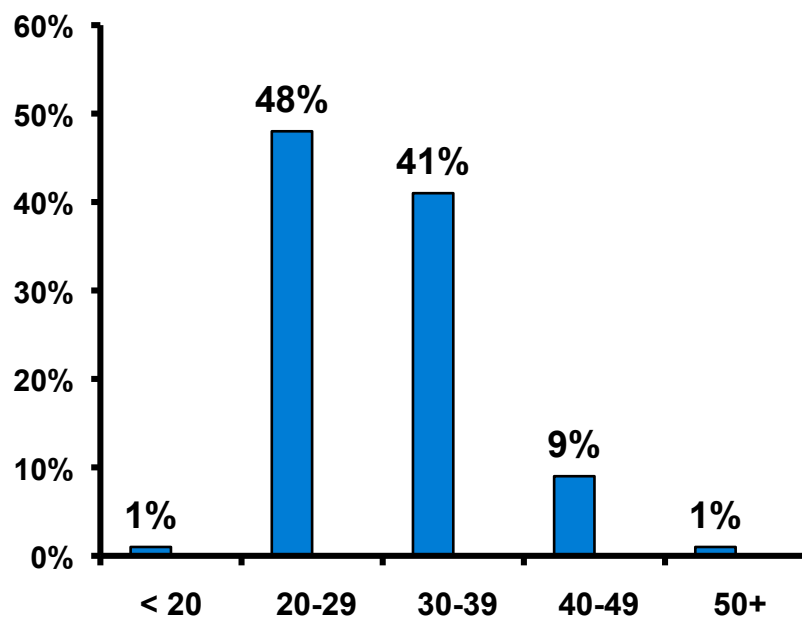


- A little more than half are married.

Marital Status

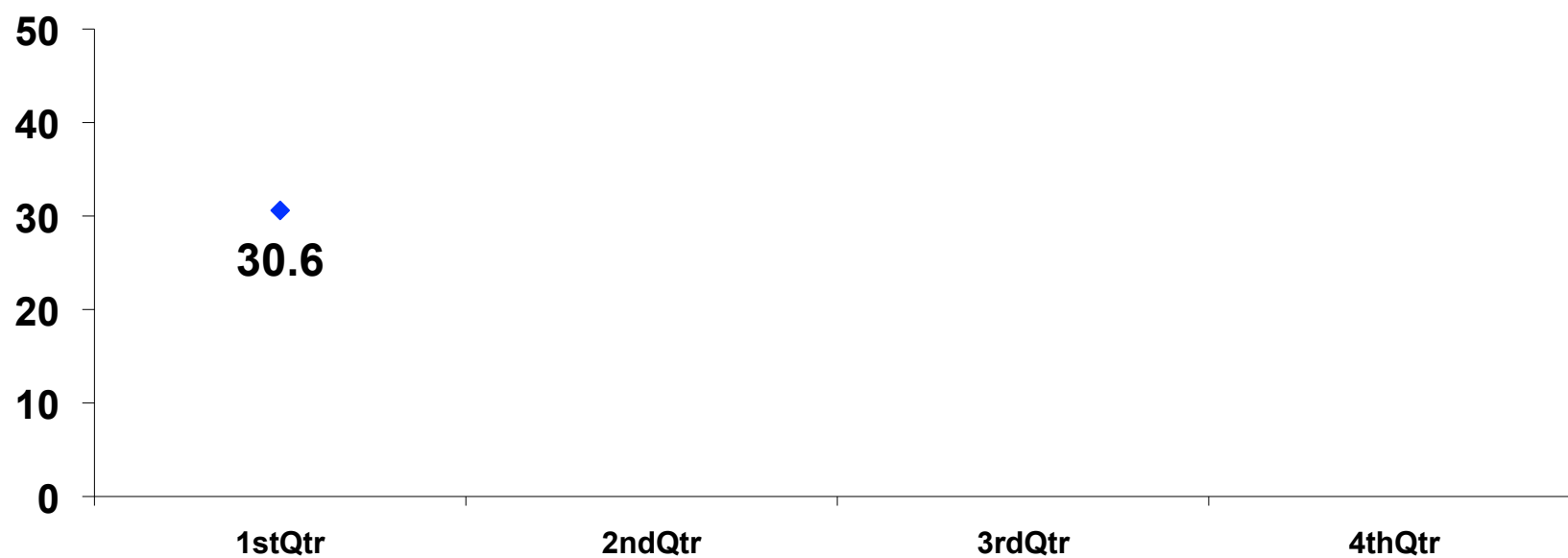


Age - Overall

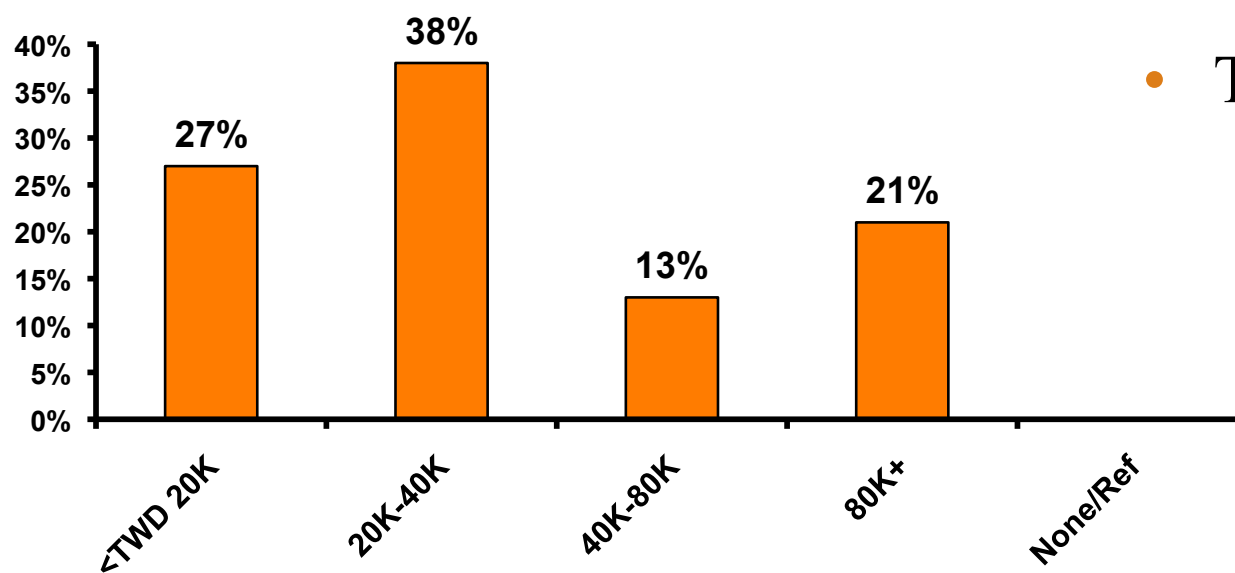


- The average age of the respondents is 30.6 years of age.

Average Age

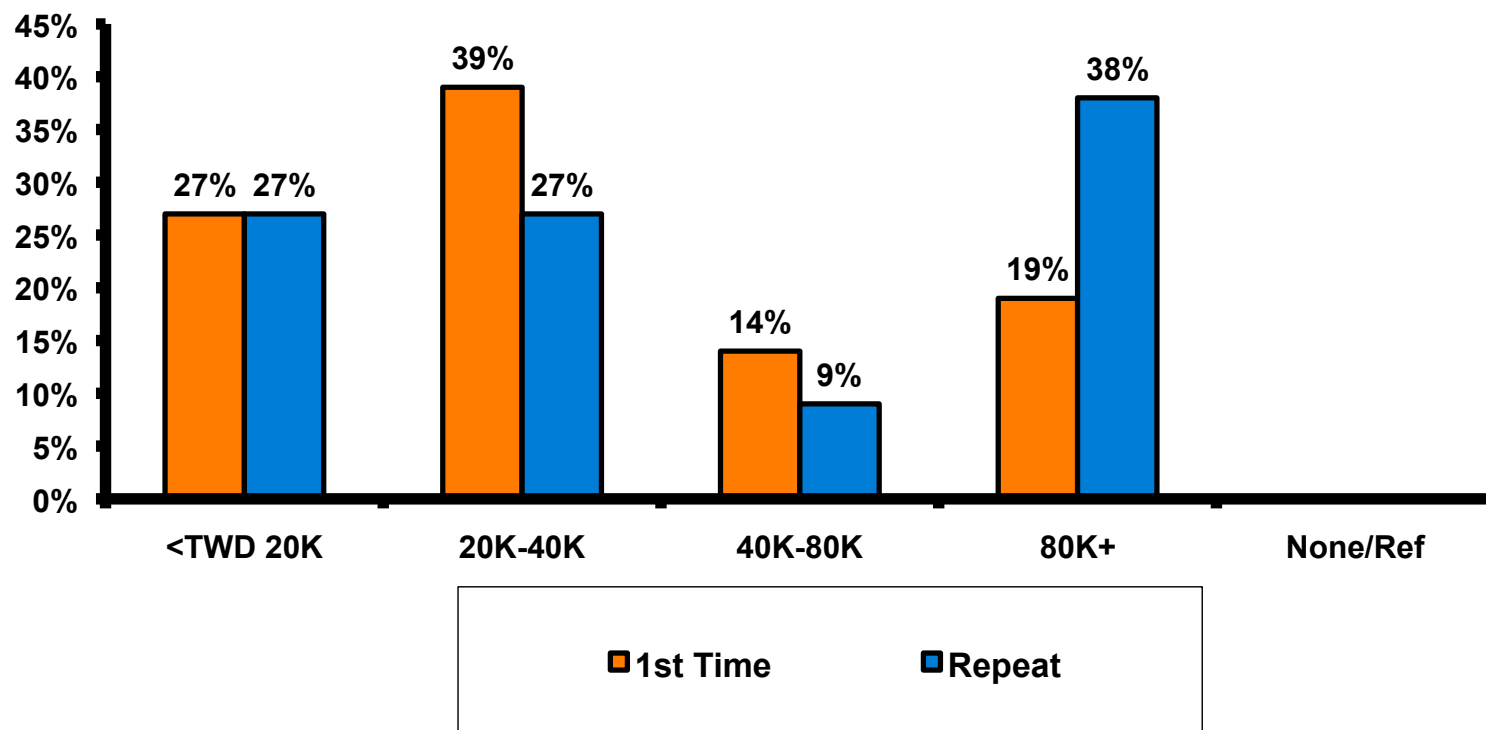


Personal Income



• TWD 29.90=\$1

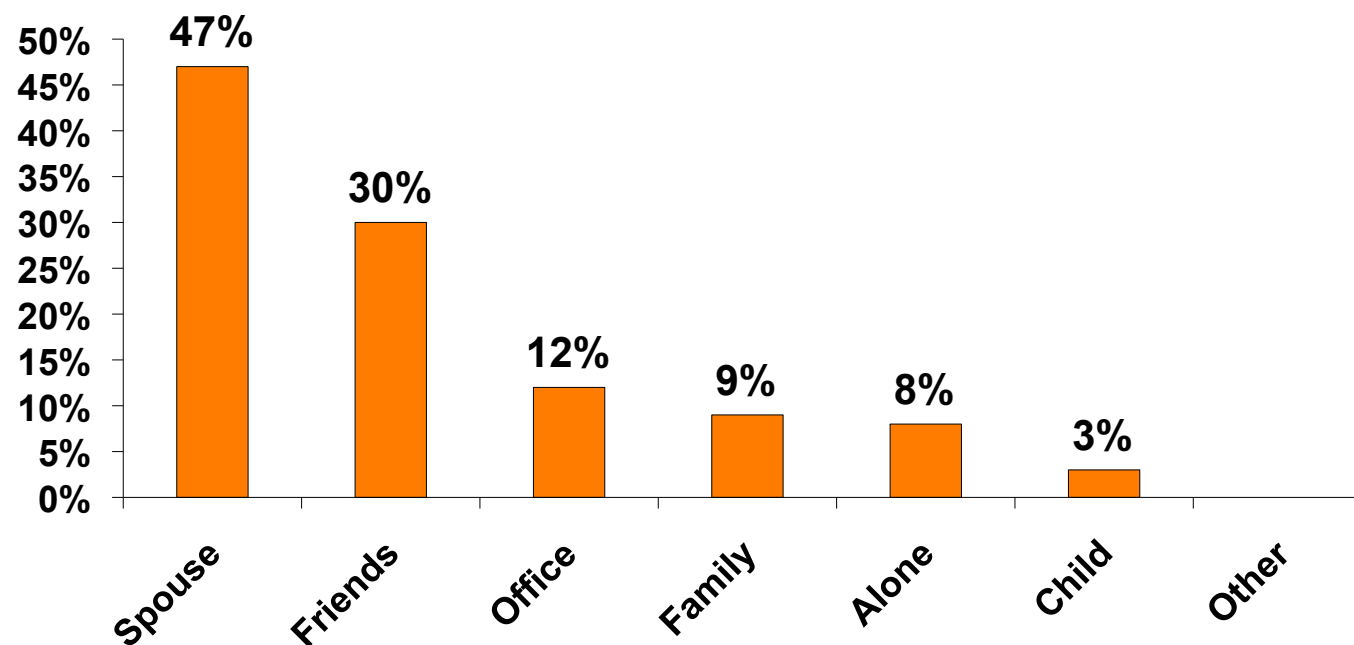
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE				
				Male	Female	<20	20-29	30-39	40-49	50+
PERSONAL INCOME	<20K	Count	37	22	15		23	13	1	
			27%	26%	29%		35%	22%	10%	
	20K-60K	Count	65	43	22		32	26	5	2
			47%	51%	42%		49%	44%	50%	100%
	60K-100K	Count	10	6	4	1	3	4	2	
			7%	7%	8%	100%	5%	7%	20%	
	100K+	Count	25	14	11		7	16	2	
			18%	16%	21%		11%	27%	20%	
Total	Count	137	85	52	1	65	59	10	2	

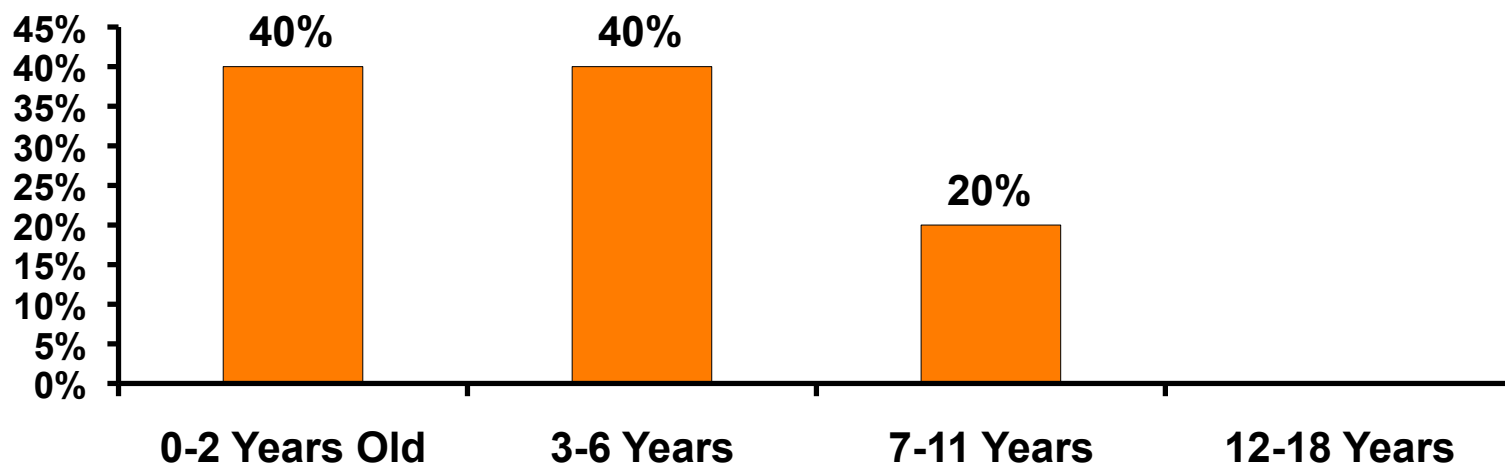
Travel Companions



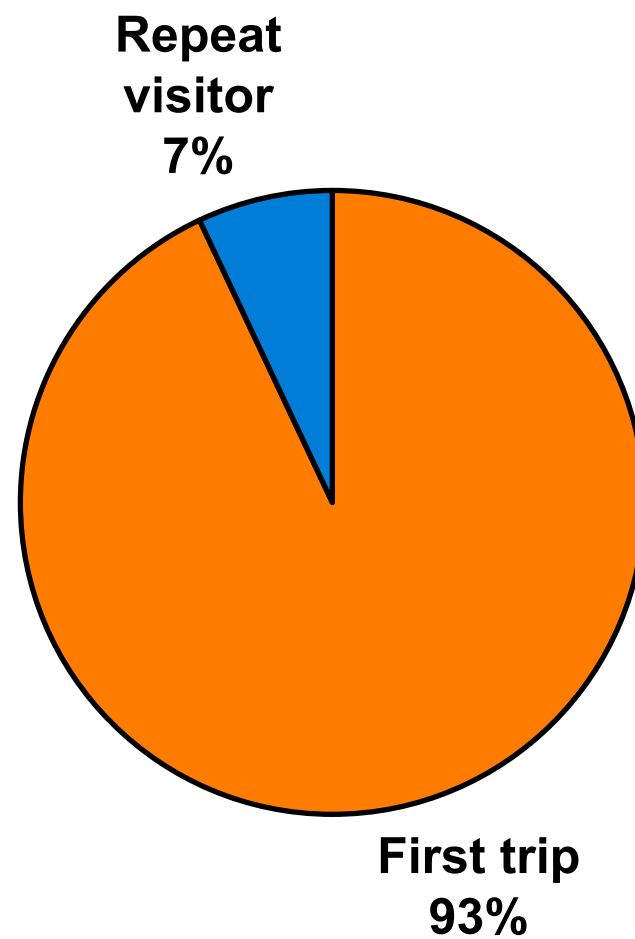
Number of Children Travel Party

N=5 total respondents traveling with children.

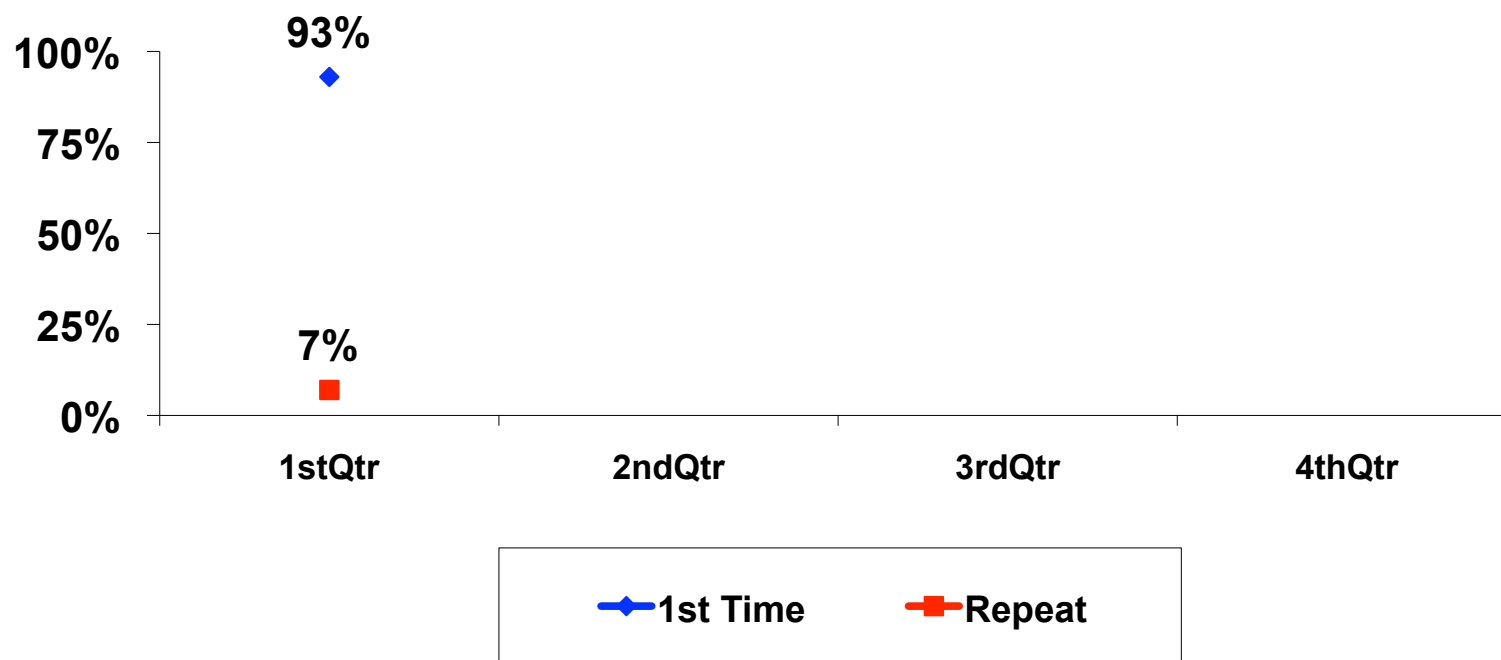
(Of those N=5 respondents, there is a total of 5 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



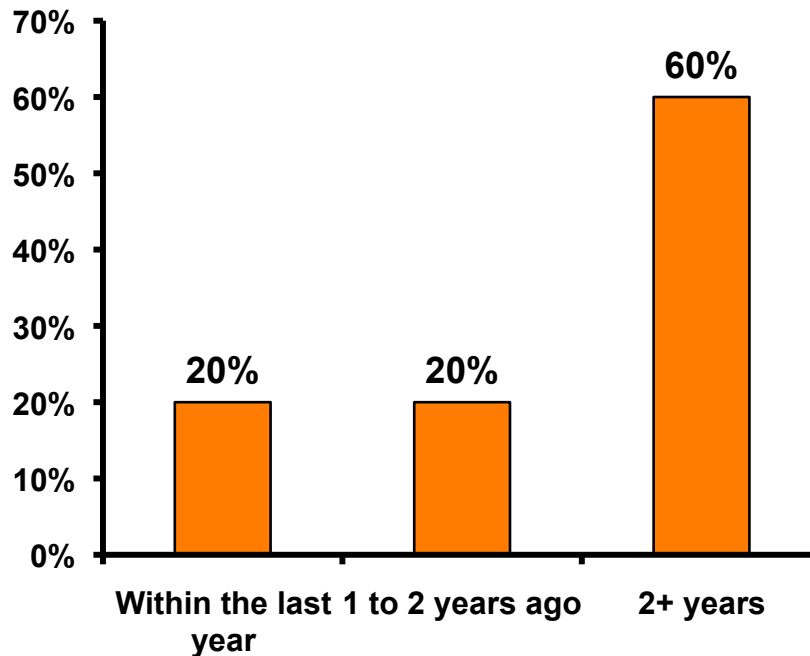
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1 st	Repeat
GENDER	Male	Count	91	84	7
			59%	59%	64%
	Female	Count	63	59	4
			41%	41%	36%
Total	Count		154	143	11
AGE	<20	Count	1	1	
			1%	1%	
	20-29	Count	74	69	5
			48%	49%	45%
	30-39	Count	62	57	5
			41%	40%	45%
	40-49	Count	14	13	1
			9%	9%	9%
	50+	Count	2	2	
			1%	1%	
Total	Count		153	142	11

- Majority are first-time visitors.

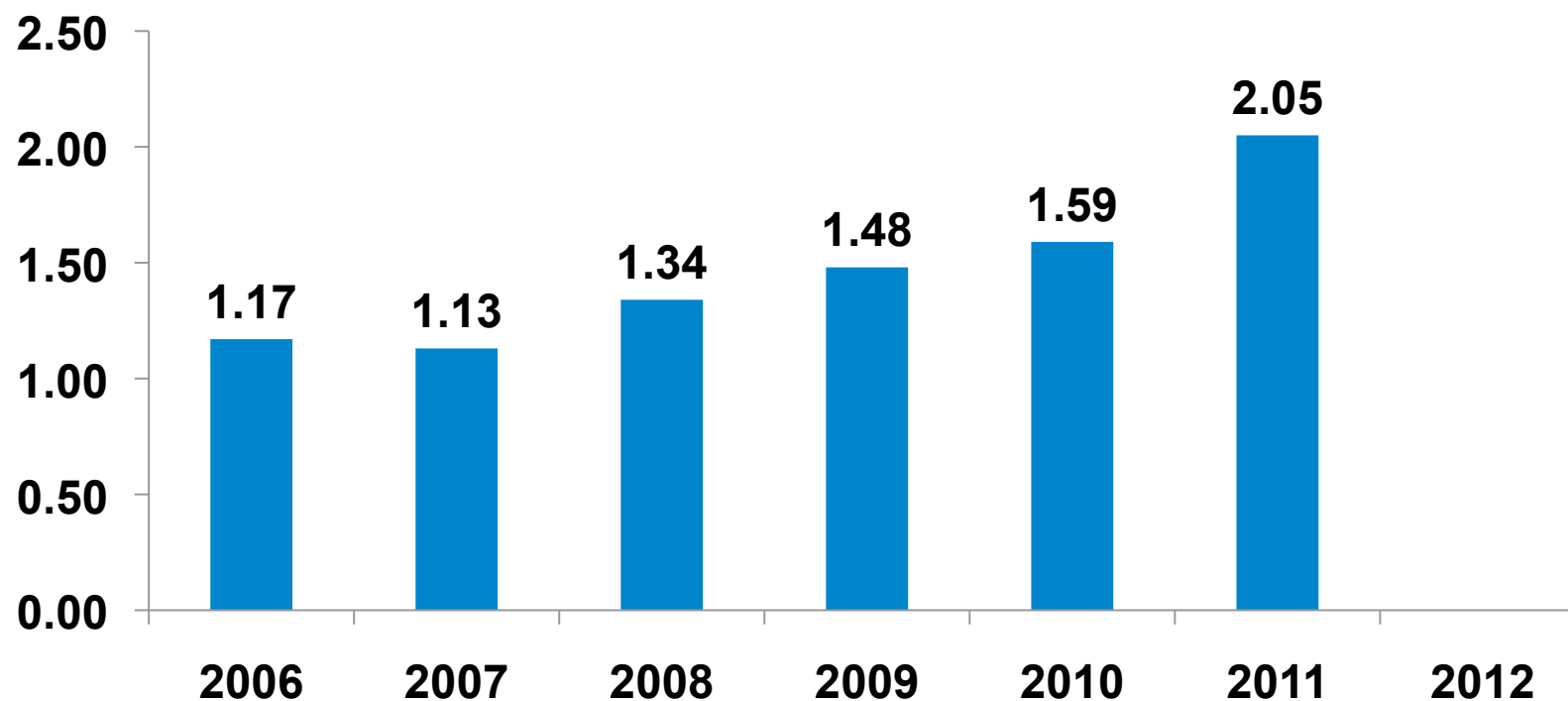
Repeat Visitors Last Trip

n = 10

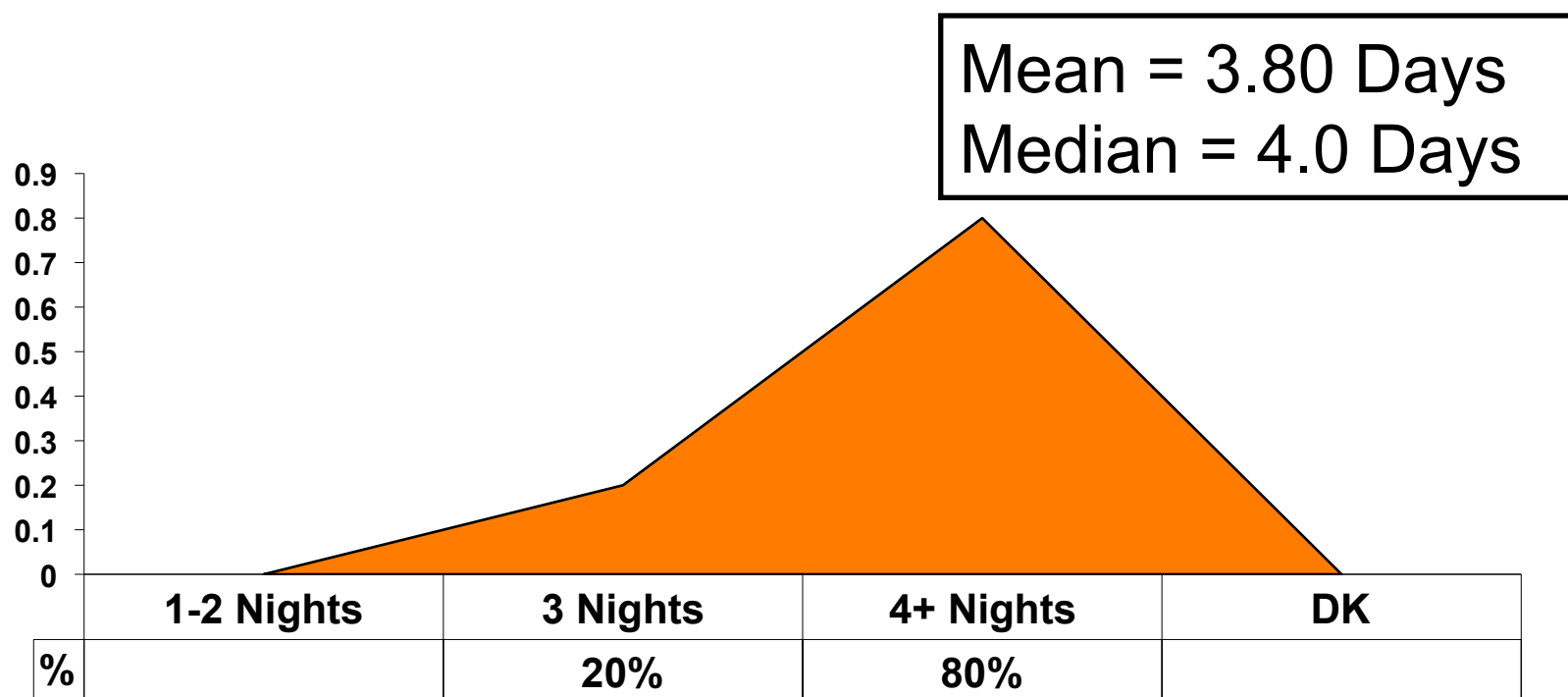


- Typical repeat visitor has been to Guam 1.7 times.

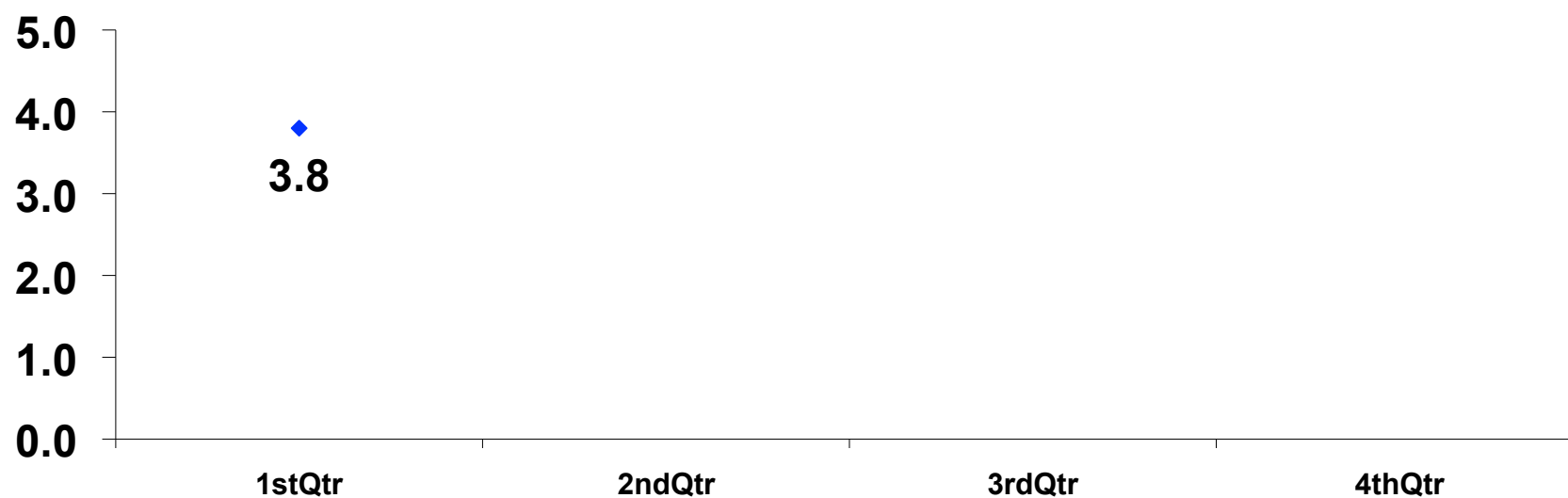
Average Number Overnight Trips (2006-2012) (2 nights or more)



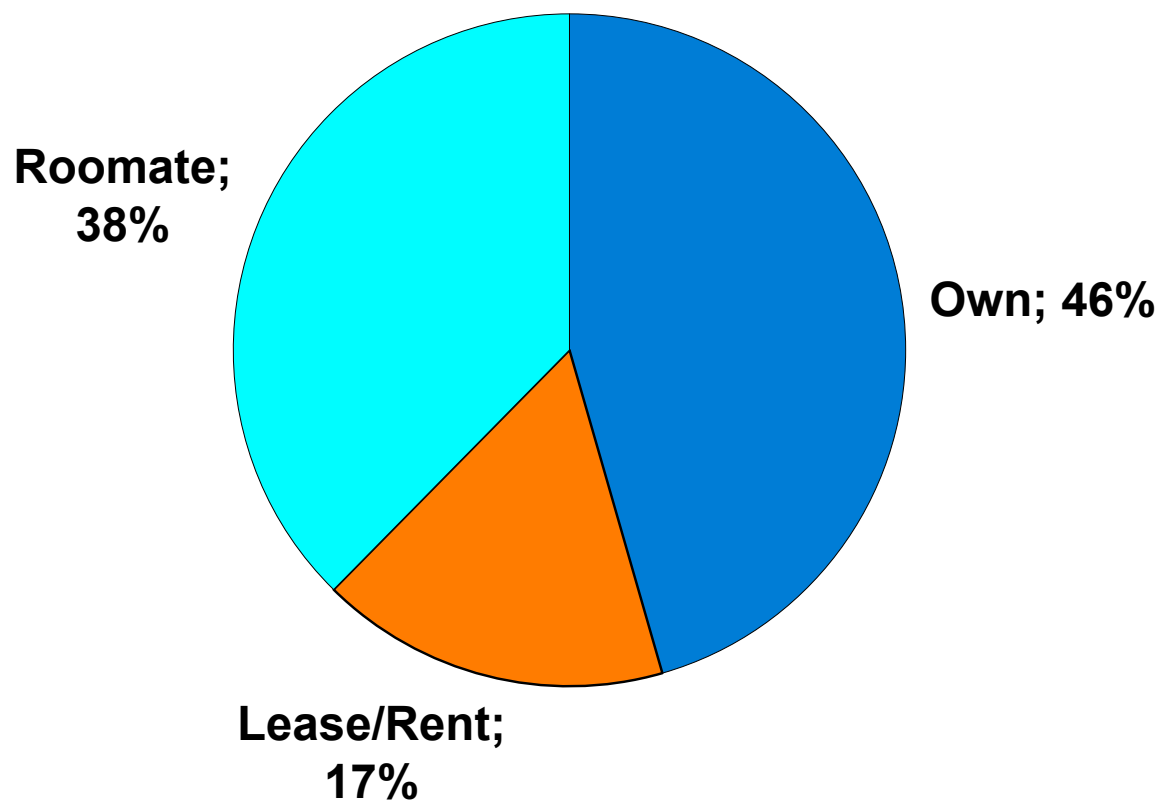
Length of Stay



Average Length of Stay



Living Accommodations

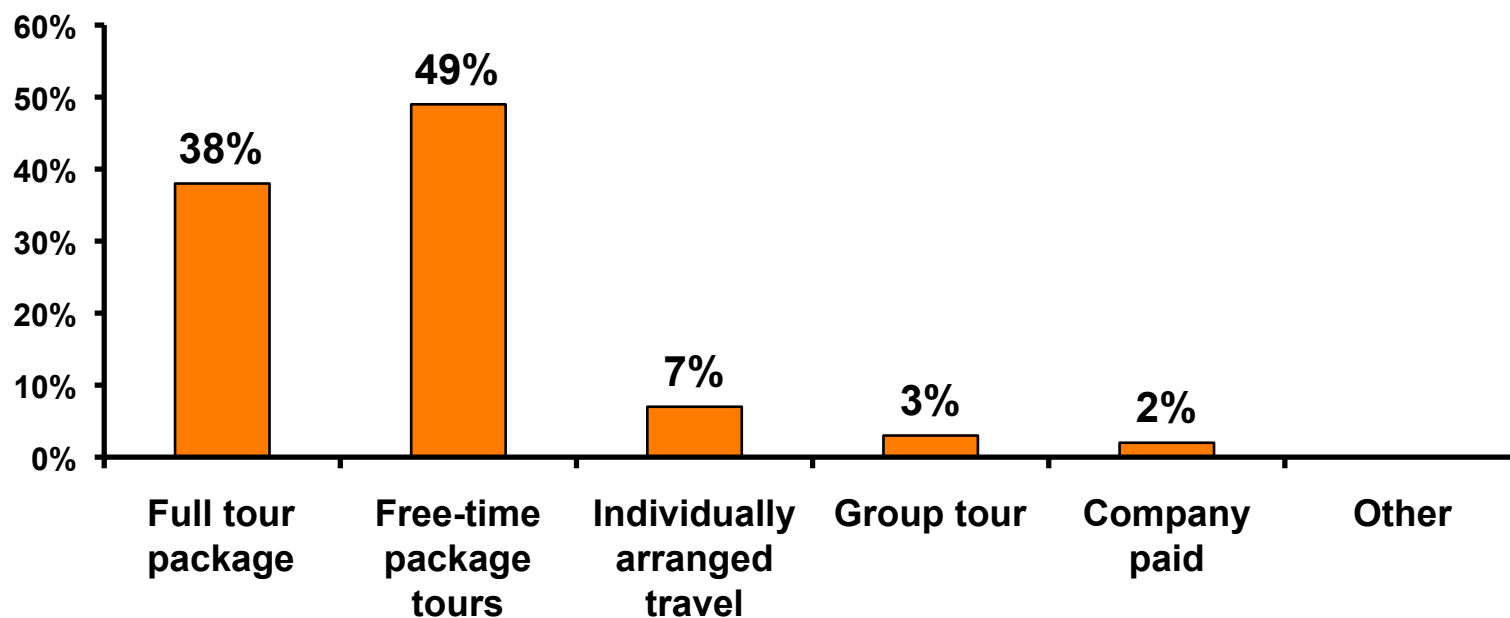


Occupation by Income

		TOTAL	PERSONAL INCOME			
			<20K	20K-60K	60K-100K	100K+
Q.36	Own my own home	46%	36%	49%	60%	44%
	Live with friends or relatives and pay no rent	38%	42%	37%	40%	48%
	Lease or rent a home or apartment	17%	22%	14%		8%
Total	Count	145	36	65	10	25

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

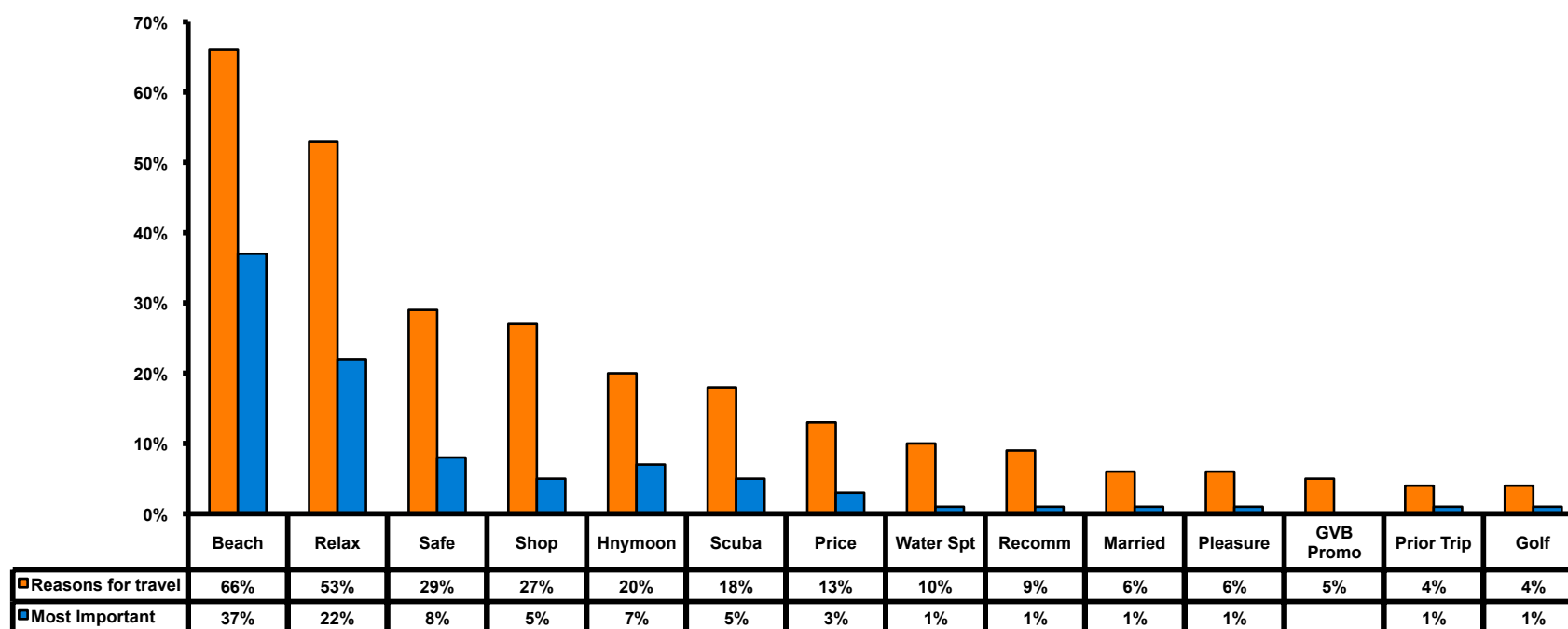


Accommodation by Income

Average length of stay: 3.80 days

		TOTAL	PERSONAL INCOME			
			<20K	20K-60K	60K-100K	100K+
Q.9	Fiesta Resort Guam	16%	11%	12%	30%	36%
	Sheraton Laguna Resort	18%	22%	18%		
	Hyatt Regency Guam	8%		8%		20%
	Royal Orchid Guam	8%	5%	9%	10%	8%
	The Westin Resort Guam	7%	22%	5%		
	Outrigger Guam Resort	7%	5%	9%	10%	4%
	Hotel Nikko Guam	7%	11%	5%	10%	8%
	Pacific Islands Club PIC	6%	3%	8%	10%	12%
	Hilton Guam Resort & Spa	6%	5%	8%	10%	4%
	Pacific Bay Hotel	5%	8%	6%		
	Holiday Resort Guam	4%		5%		4%
	Hotel Sane Fe	3%	3%	3%	10%	4%
	Guam Marriott Resort Hotel	2%		5%		
	Guam Reef Hotel	1%	5%			
	Relatives, Friends, Home Stay	1%			10%	
Total	Count	154	37	65	10	25

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- The need to relax and
- Safety

are the three reasons mentioned most often as the most important reason for this particular trip.

Motivation by Age & Gender

		TOTAL	AGE					GENDER	
			<20	20-29	30-39	40-49	50+	Male	Female
Q.5	Beautiful seas, beaches, tropical climate	66%		62%	79%	36%	100%	68%	63%
	Just to relax	53%	100%	49%	52%	79%		55%	49%
	It is a safe place to spend a vacation	29%		32%	24%	36%	50%	29%	30%
	Shopping	27%		31%	24%	14%	50%	30%	22%
	Honeymoon	20%		27%	18%			23%	16%
	SCUBA diving	18%		18%	21%	7%		18%	17%
	Price of the tour package	13%		12%	16%	7%		18%	6%
	Water sports	10%		11%	13%			12%	8%
	Recommendation of friend, relative, travel agency	9%		14%	5%	7%		10%	8%
	To get married or Attend wedding	6%		5%	6%		50%	9%	2%
	Pleasure	6%		7%	5%	7%		7%	5%
	Promotional materials from GVB	5%		5%	5%			4%	5%
	Other	5%			10%	7%		2%	8%
	A previous visit	4%		4%	3%	7%		3%	5%
	To golf	4%		4%		14%	50%	4%	3%
	Short travel time	3%		3%	3%	7%		2%	5%
	To visit friends or relatives	3%		3%	3%			2%	3%
	Company or Business trip	2%	100%	1%		7%		2%	2%
	Career certification or testing	1%		1%	2%			1%	2%
	My company sponsored me	1%	100%					1%	
	Special promotion	1%			2%				2%
	Organized Sporting Activity	1%		1%				1%	
Total	Cases	154	1	74	62	14	2	91	63

Motivation by Income

		TOTAL	PERSONAL INCOME			
			<20K	20K-60K	60K-100K	100K+
Q.5	Beautiful seas, beaches, tropical climate	66%	70%	65%	60%	76%
	Just to relax	53%	49%	52%	50%	60%
	It is a safe place to spend a vacation	29%	27%	32%	30%	36%
	Shopping	27%	30%	26%	10%	32%
	Honeymoon	20%	38%	23%	10%	
	SCUBA diving	18%	22%	14%		20%
	Price of the tour package	13%	5%	17%	10%	20%
	Water sports	10%	8%	9%	30%	16%
	Recommendation of friend, relative, travel agency	9%	8%	17%		
	To get married or Attend wedding	6%	5%	8%	10%	4%
	Pleasure	6%	3%	3%	10%	16%
	Promotional materials from GVB	5%	3%	9%		
	Other	5%	8%	2%		12%
	A previous visit	4%	3%	3%	10%	8%
	To golf	4%	5%	3%		
	Short travel time	3%	3%	2%	10%	4%
	To visit friends or relatives	3%	3%	3%	10%	
	Company or Business trip	2%		3%	10%	
	Career certification or testing	1%	3%			
	My company sponsored me	1%			10%	
Special promotion	1%				4%	
Organized Sporting Activity	1%		2%			
Total	Cases	154	37	65	10	25

SECTION 3 **EXPENDITURES**

Prepaid Expenditures

TWD 29.90/US\$1

- \$1,294.70 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$6,688 = maximum (highest amount recorded for the entire sample)
- \$847.50 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

TWD 29.90=\$1

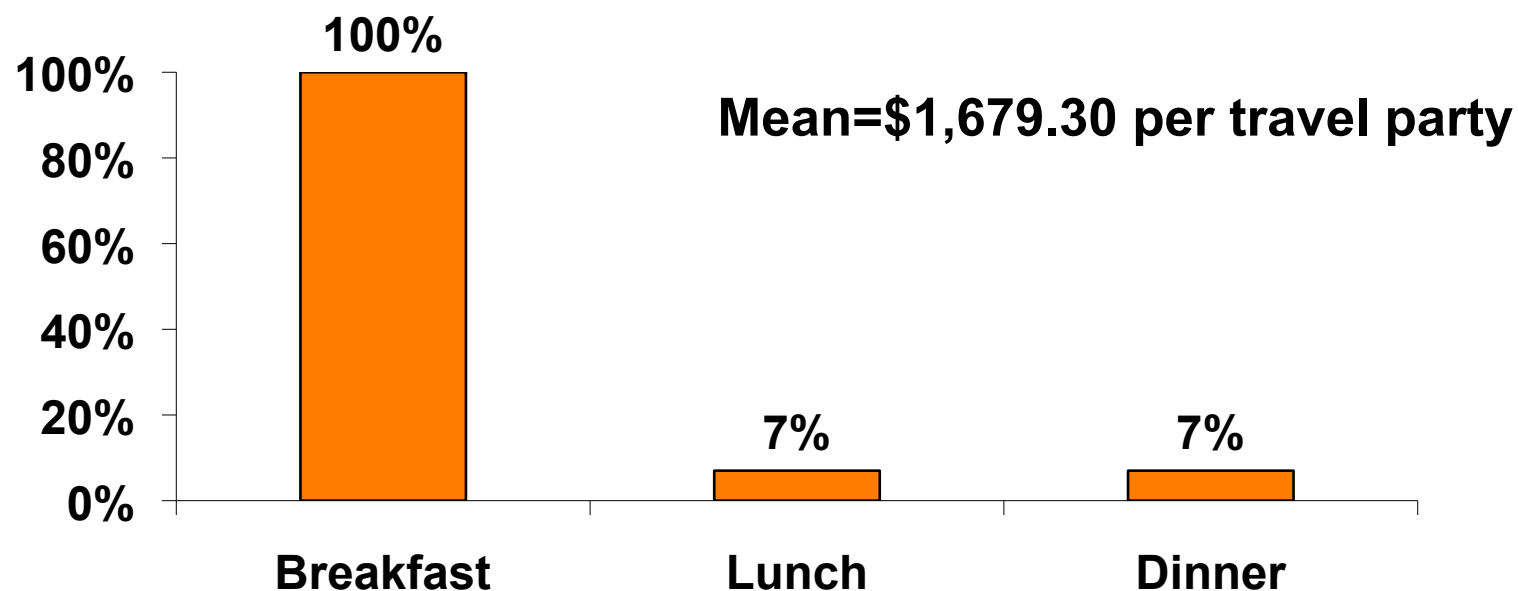
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$1,006.40
Air & Accommodation w/ daily meal package	\$1,679.30
Air only	\$3,010.00
Accommodation only	\$1,025.10
Accommodation w/ daily meal only	\$1,000.00
Food & Beverages in Hotel	\$53.50
Ground transportation – China	\$59.70
Ground transportation – Guam	\$37.40
Optional tours/ activities	\$234.70
Other expenses	\$569.70
Total Prepaid	\$1,294.70

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

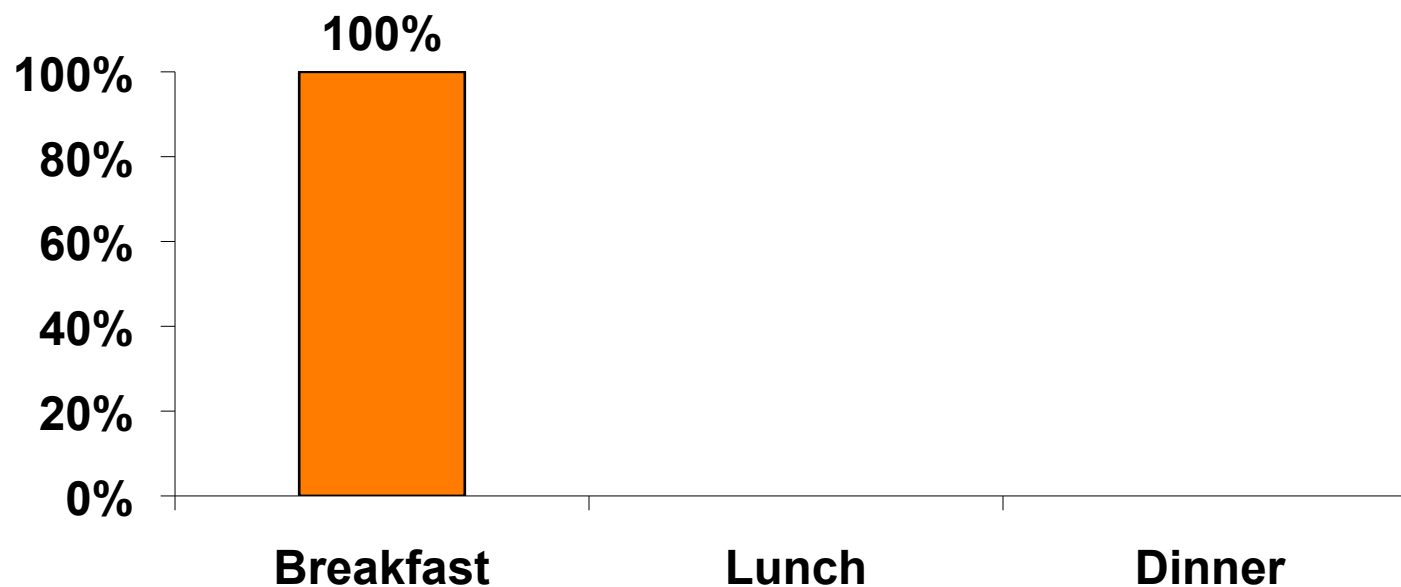
n=69



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

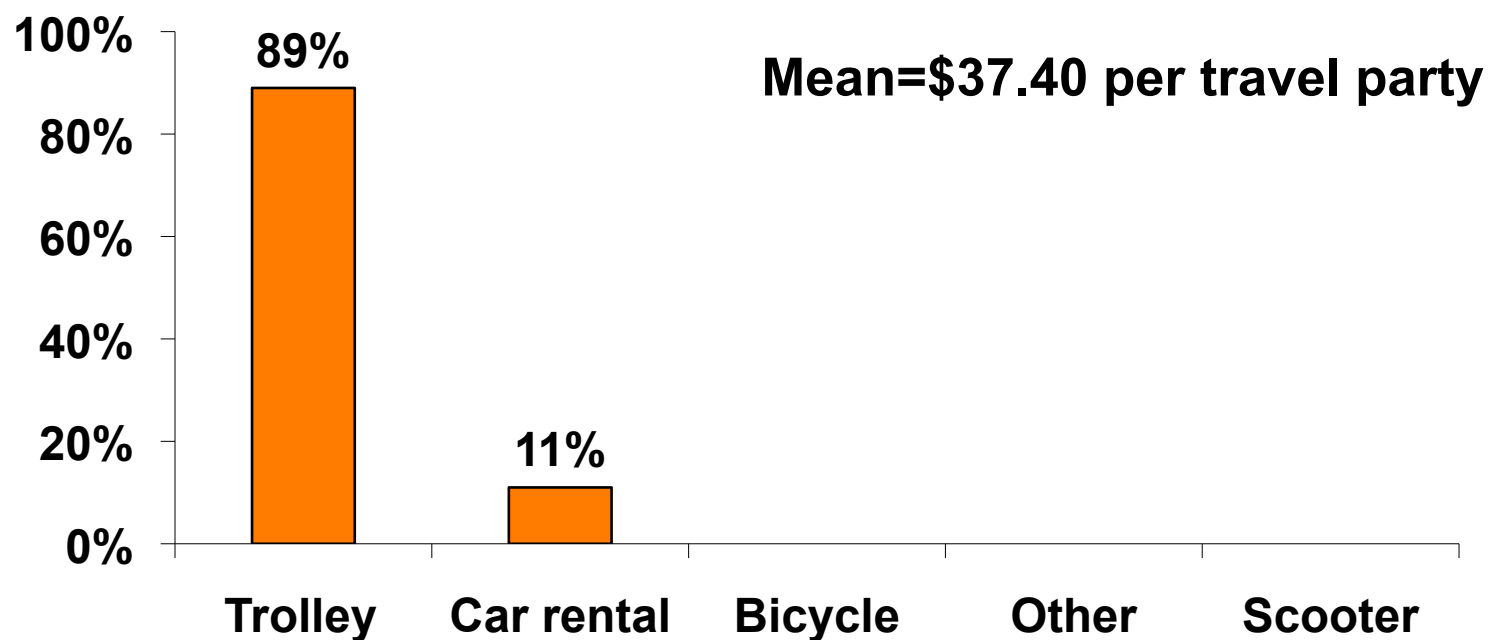
n= 1



Mean= \$1,000 per travel party

Prepaid Ground Transportation

n=9



On-Island Expenditures

- \$1,039.20 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,000 = Maximum (highest amount recorded for the entire sample)
- \$718.30 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person

YTD = \$718.30



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
			Male	Female	Male					Female		
					AGE					AGE		
					<20	20-29	30-39	40-49	50+	20-29	30-39	40-49
Q.11A	Mean	\$1,039.21	\$1,021.98	\$1,064.10	\$330.00	\$1,104.81	\$1,097.74	\$435.25	\$550.00	\$1,095.99	\$1,143.66	\$651.57
	Median	\$908	\$875	\$941	\$330	\$1,000	\$915	\$350	\$550	\$1,000	\$835	\$580

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$37.90	\$37.97	\$37.81	\$0.00	\$37.64	\$36.97	\$54.29	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF	Mean	\$39.90	\$37.10	\$43.94	\$0.00	\$34.19	\$52.48	\$25.71	\$0.00
REST/CONV	Median	\$14	\$15	\$10	\$0	\$0	\$28	\$5	\$0
F&B-OUT- SIDE	Mean	\$36.10	\$35.78	\$36.56	\$0.00	\$34.09	\$45.18	\$16.79	\$0.00
HOTEL/ REST	Median	\$0	\$0	\$0	\$0	\$0	\$6	\$0	\$0
OPTIONAL	Mean	\$92.56	\$79.90	\$110.84	\$0.00	\$114.82	\$75.92	\$75.00	\$0.00
TOUR	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/	Mean	\$243.12	\$261.71	\$216.27	\$0.00	\$228.11	\$292.19	\$167.50	\$50.00
SOUV-SELF	Median	\$100	\$130	\$100	\$0	\$100	\$146	\$175	\$50
GIFT/ SOUV-	Mean	\$145.70	\$166.94	\$115.01	\$0.00	\$112.33	\$194.90	\$79.71	\$462.50
F&F AT HOME	Median	\$50	\$60	\$50	\$0	\$38	\$100	\$40	\$463
LOCAL TRANS	Mean	\$26.45	\$31.23	\$19.54	\$0.00	\$27.82	\$26.29	\$22.07	\$37.50
	Median	\$5	\$20	\$0	\$0	\$3	\$11	\$6	\$38
OTHER EXP	Mean	\$418.47	\$371.06	\$486.95	\$330.00	\$513.69	\$388.46	\$86.89	\$0.00
	Median	\$147	\$98	\$199	\$330	\$213	\$130	\$15	\$0
TOTAL ON ISLAND	Mean	\$1,039.21	\$1,021.98	\$1,064.10	\$330.00	\$1,100.52	\$1,112.55	\$527.96	\$550.00
	Median	\$908	\$875	\$941	\$330	\$1,000	\$891	\$500	\$550

On-Island Expenditures

First Timers & Repeaters

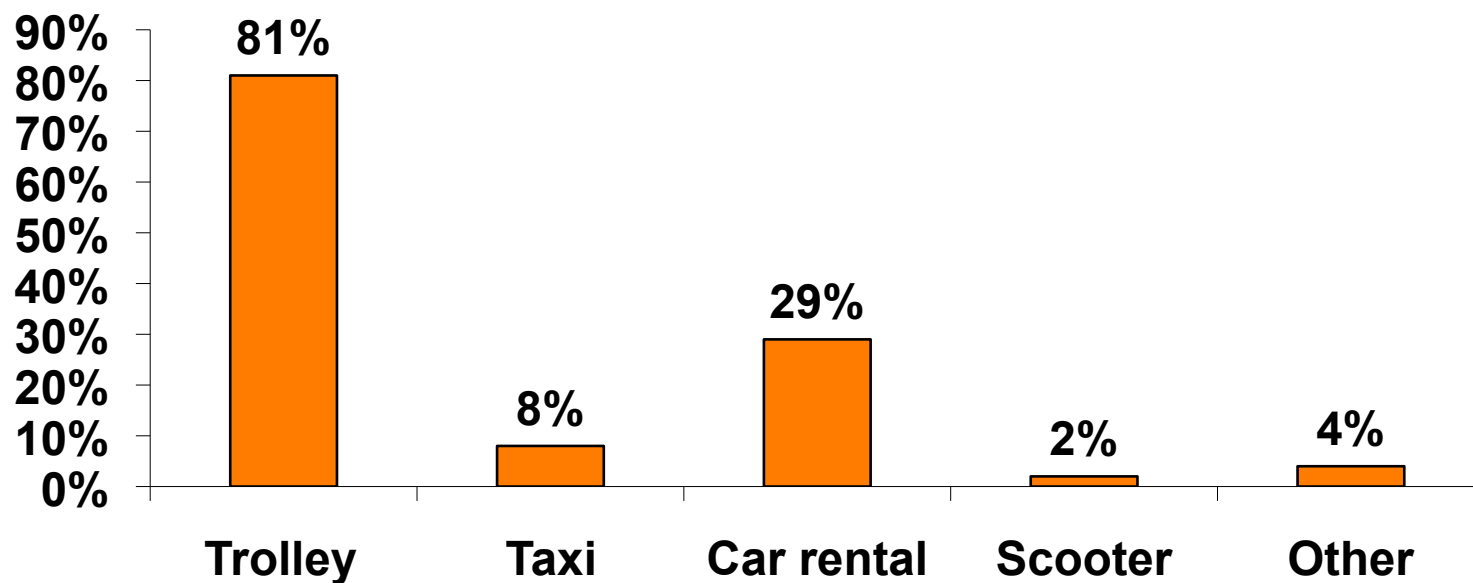
		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$36.69	\$53.73
	Median	\$0	\$0
F&B-FF REST/CONV	Mean	\$37.57	\$70.09
	Median	\$10	\$25
F&B-OUT- SIDE HOTEL/ REST	Mean	\$37.08	\$23.27
	Median	\$0	\$0
OPTIONAL TOUR	Mean	\$94.92	\$61.82
	Median	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$248.88	\$168.27
	Median	\$100	\$141
GIFT/ SOUV- F&F AT HOME	Mean	\$150.09	\$88.64
	Median	\$60	\$0
LOCAL TRANS	Mean	\$26.59	\$24.55
	Median	\$6	\$2
OTHER EXP	Mean	\$408.29	\$550.76
	Median	\$144	\$180
TOTAL ON ISLAND	Mean	\$1,039.06	\$1,041.13
	Median	\$989	\$659

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$37.90
Food & beverage in fast food restaurant/ convenience store	\$39.90
Food & beverage at restaurants or drinking establishments outside a hotel	\$36.10
Optional tours and activities	\$92.60
Gifts/ souvenirs for yourself/companions	\$243.10
Gifts/ souvenirs for friends/family at home	\$145.70
Local transportation	\$26.40
Other expenses not covered	\$418.50
Average Total	\$1,039.20

Local Transportation

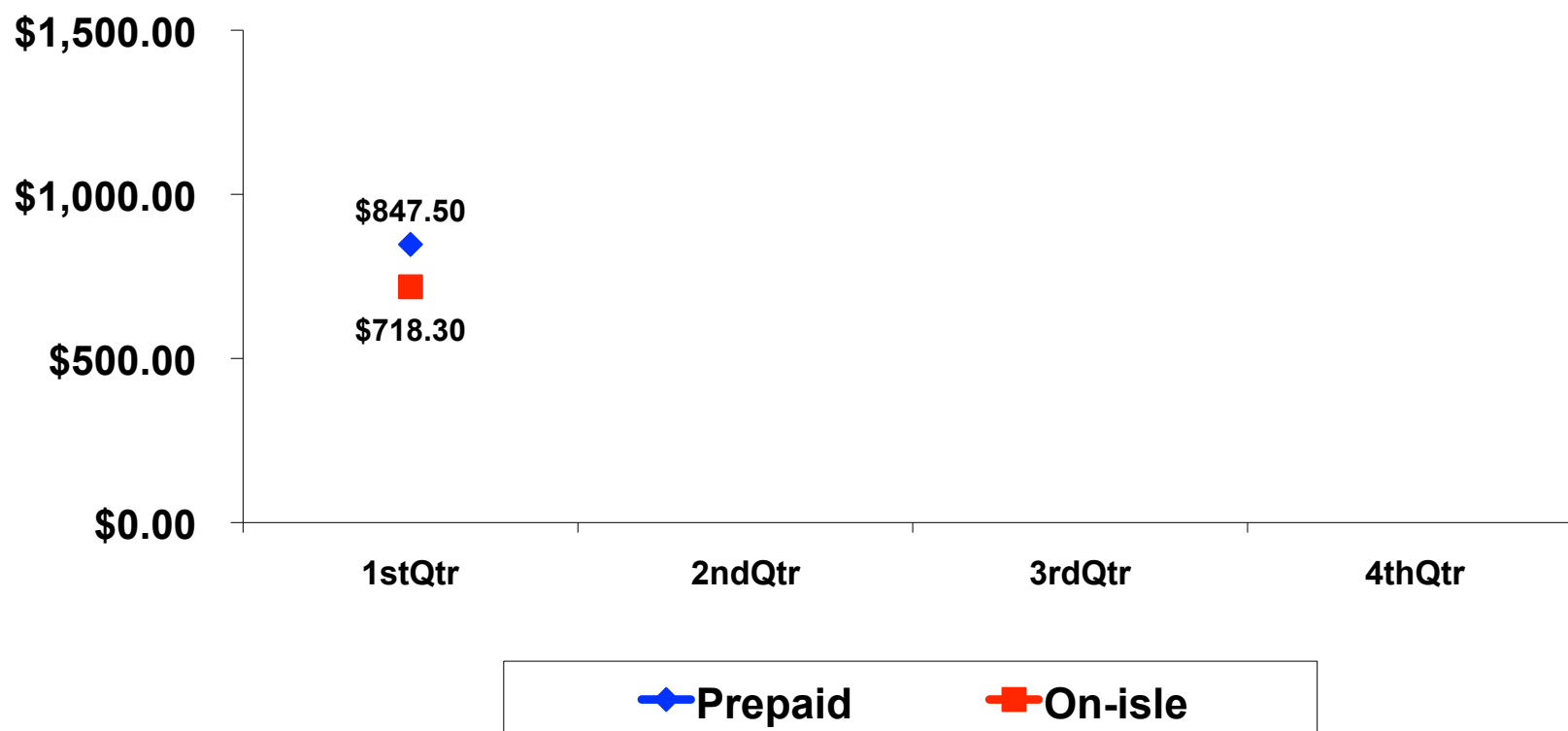
n=52



Mean=\$26.40 per travel party

Prepaid / On-Island Expenditures Per Person

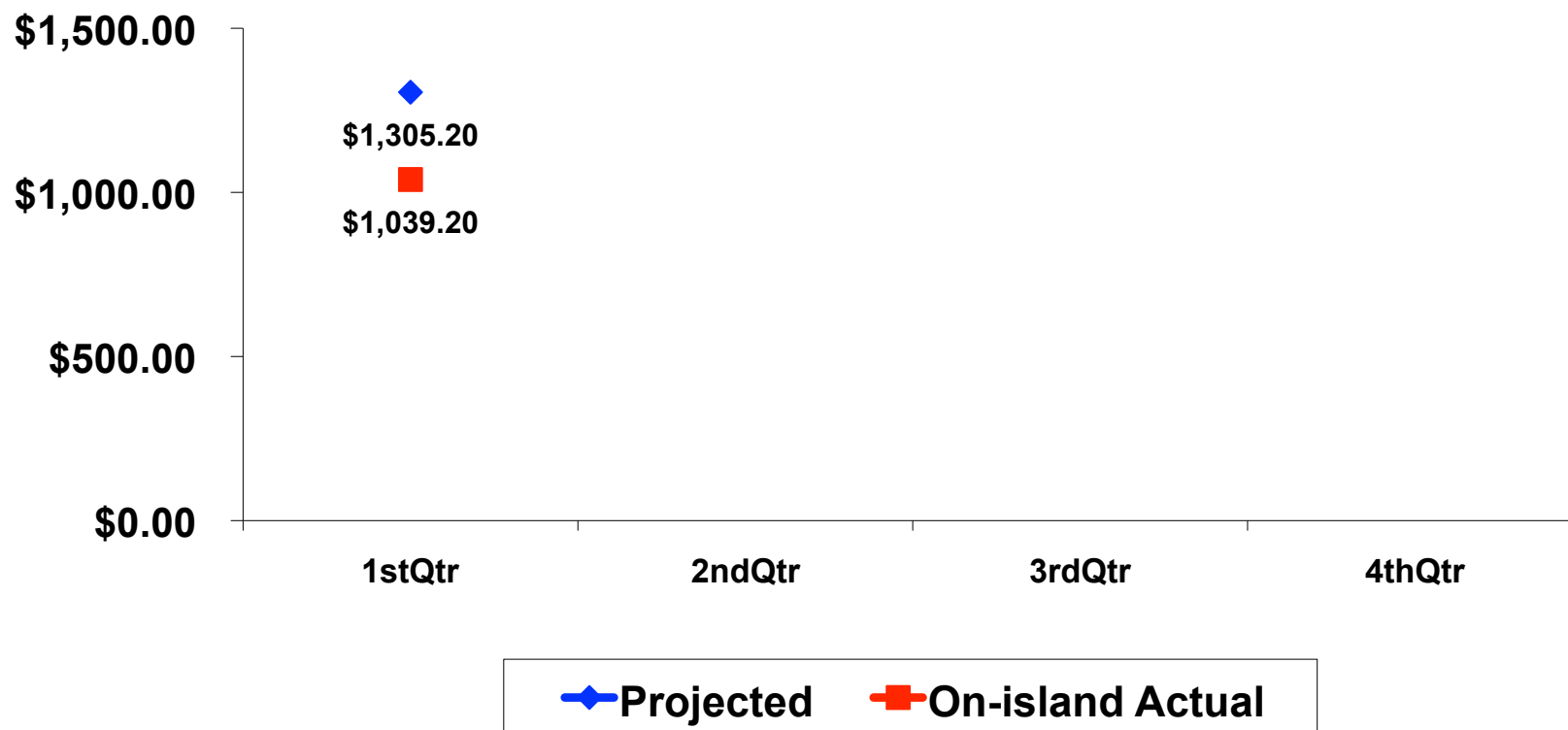
On-Island YTD = \$718.30 • Prepaid YTD=\$847.50



Projected On-Island Expenditures

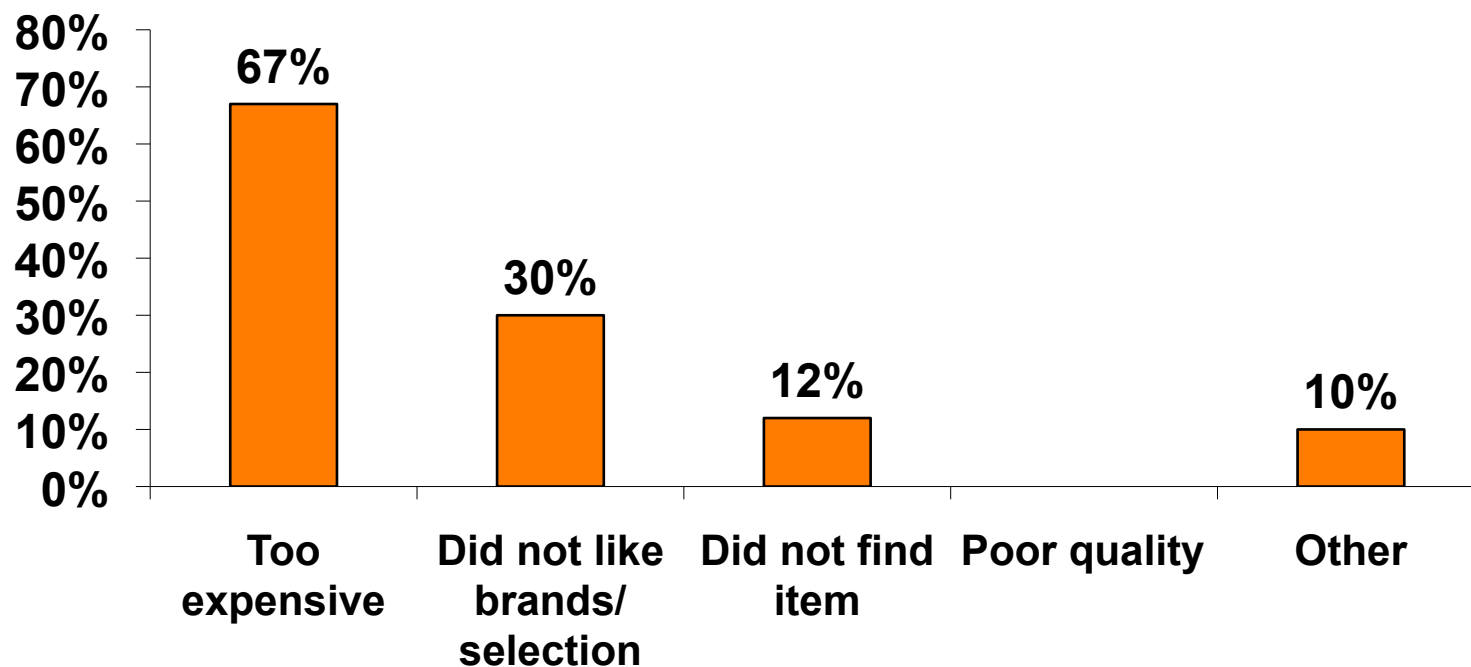
- \$1,305.20 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,000 = Maximum (highest amount recorded for the entire sample)

Projected vs. Actual On-Island Expenditures



Reasons for Spending Less

n=73

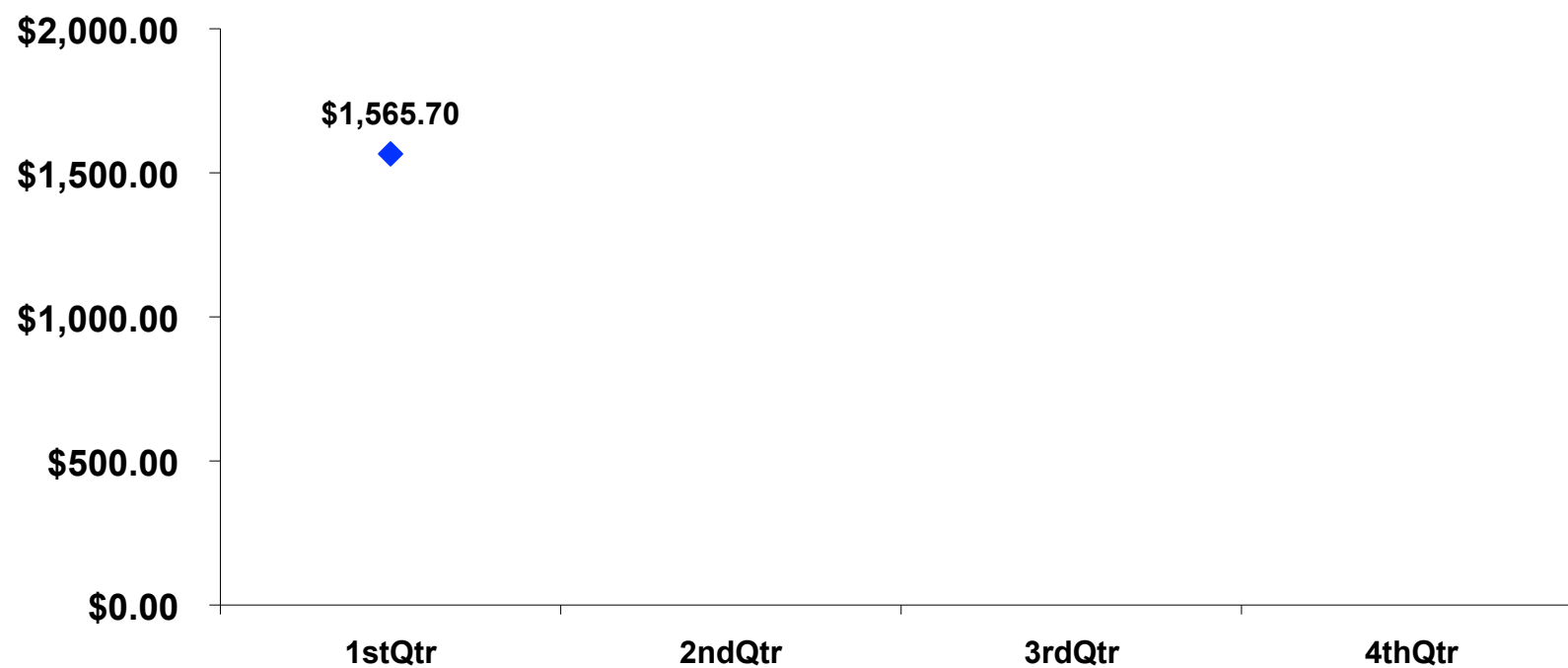


Total Expenditures Per Person (Prepaid & On-Island)

- \$1,565.70 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,808 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

YTD=\$1,565.70



Guam Airport Expenditures

- \$54.90 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

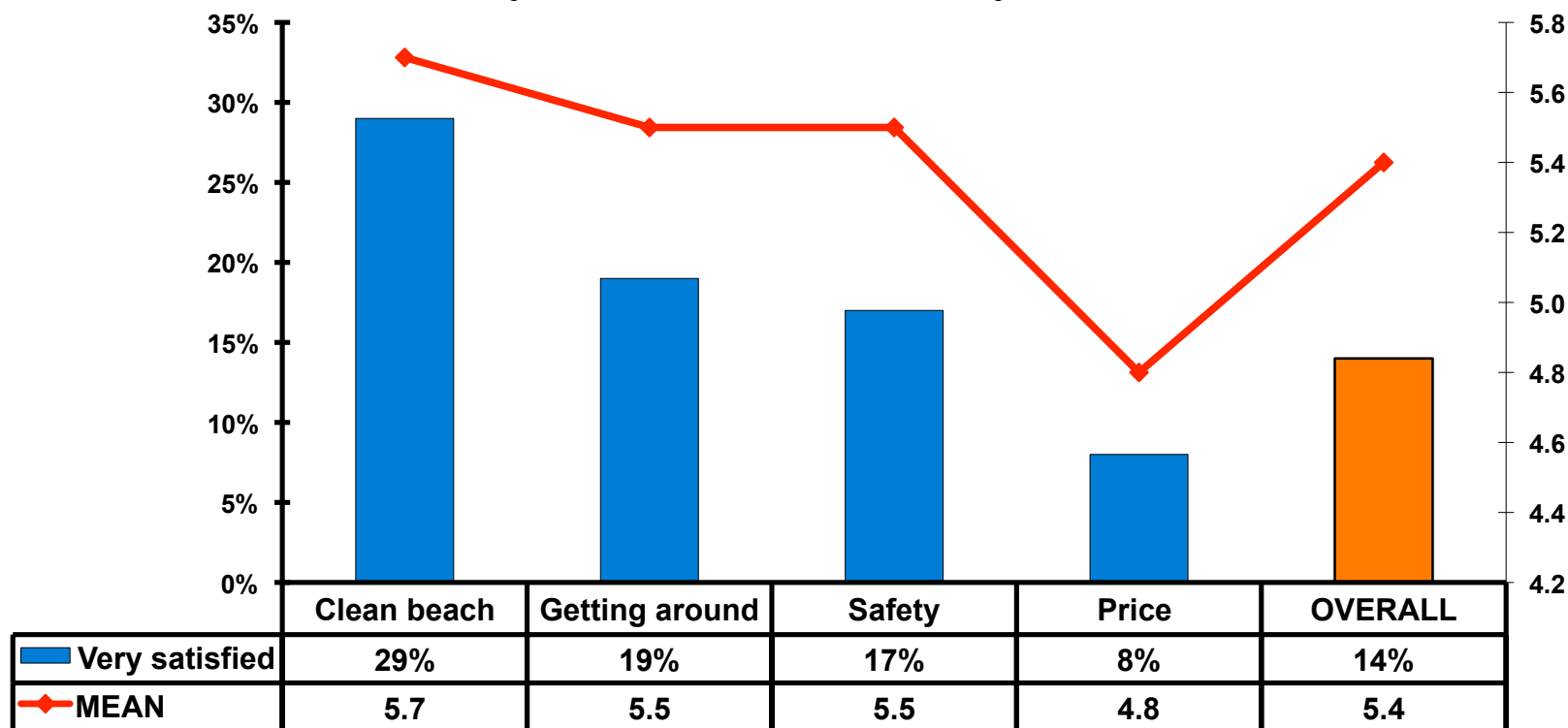
	MEAN \$
Food & Beverages	\$9.80
Gifts/Souvenirs Self	\$30.50
Gifts/Souvenirs Others	\$14.60
Total	\$54.90

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

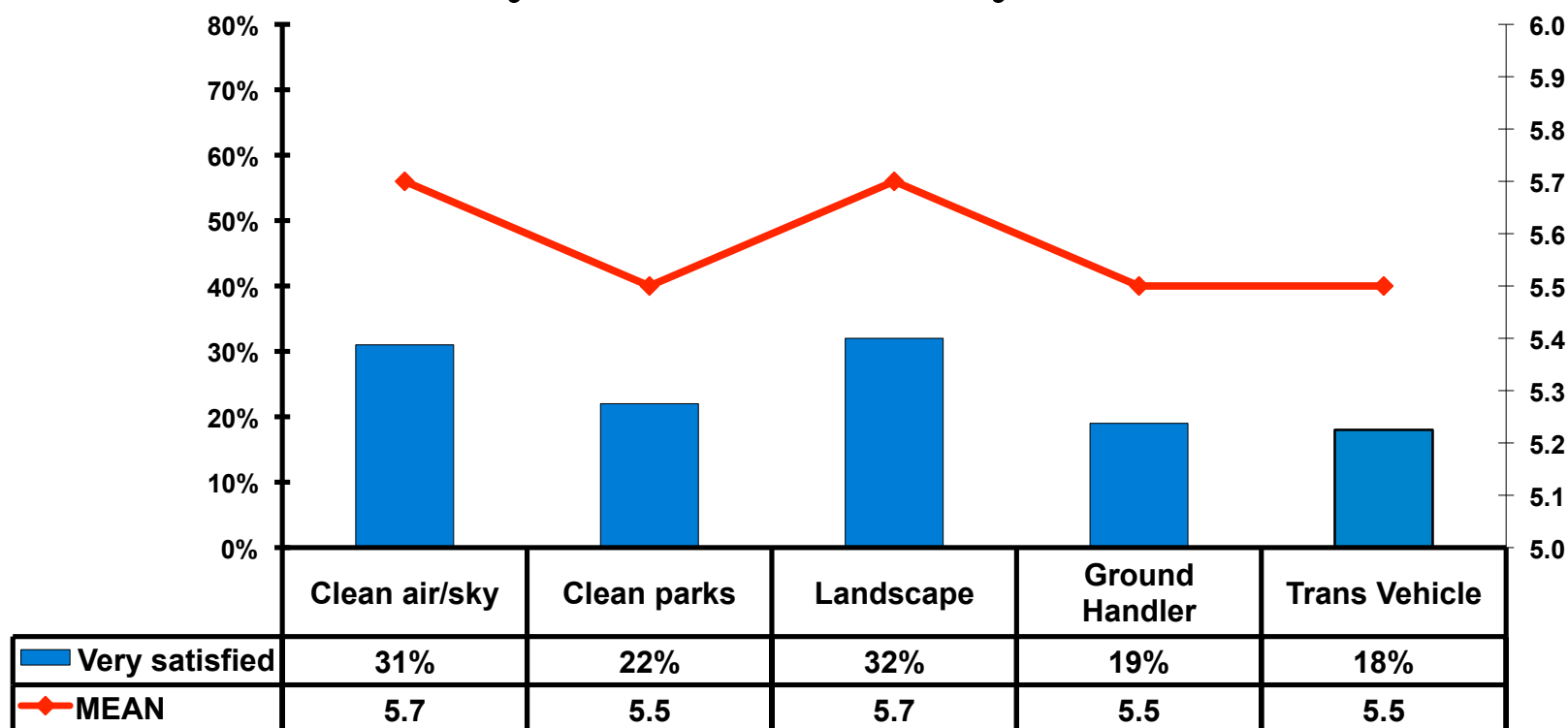
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Scores Overall

7pt Rating Scale

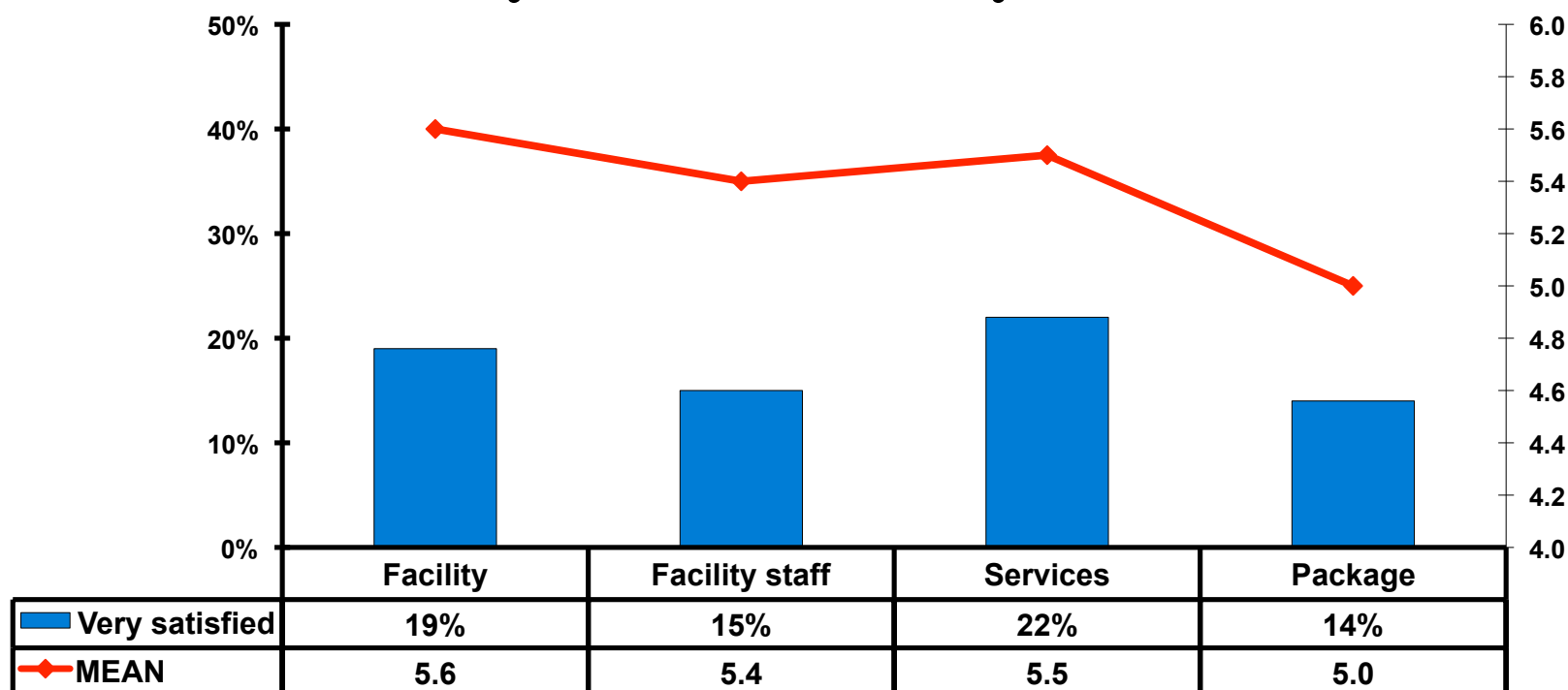
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Scores Wedding

7pt Rating Scale

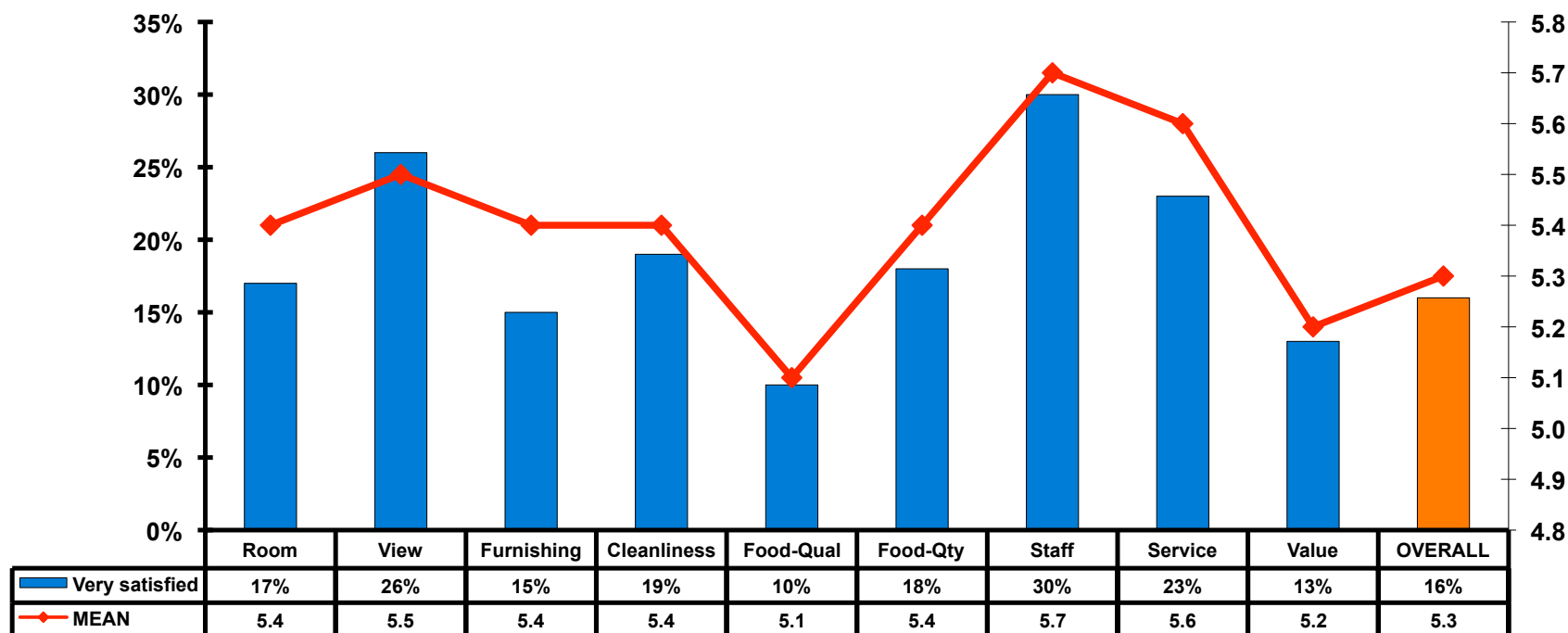
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

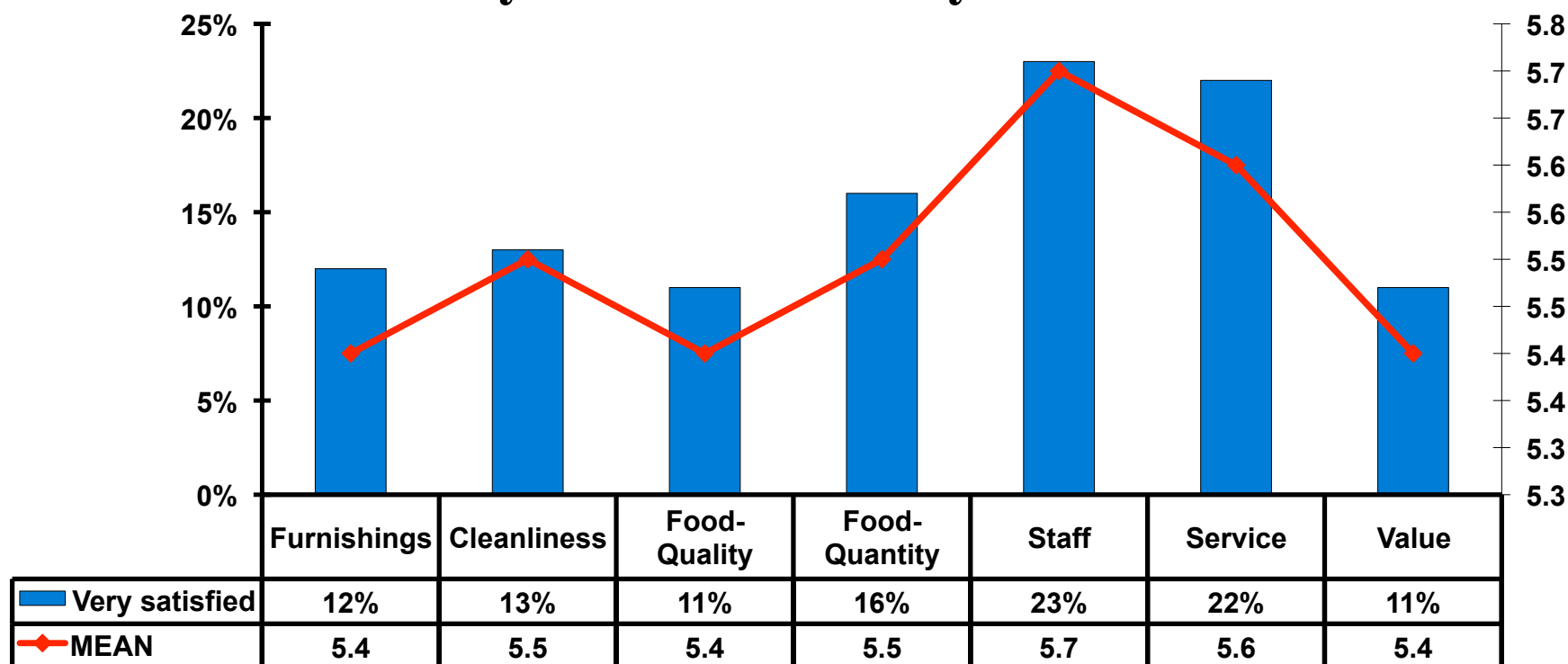
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

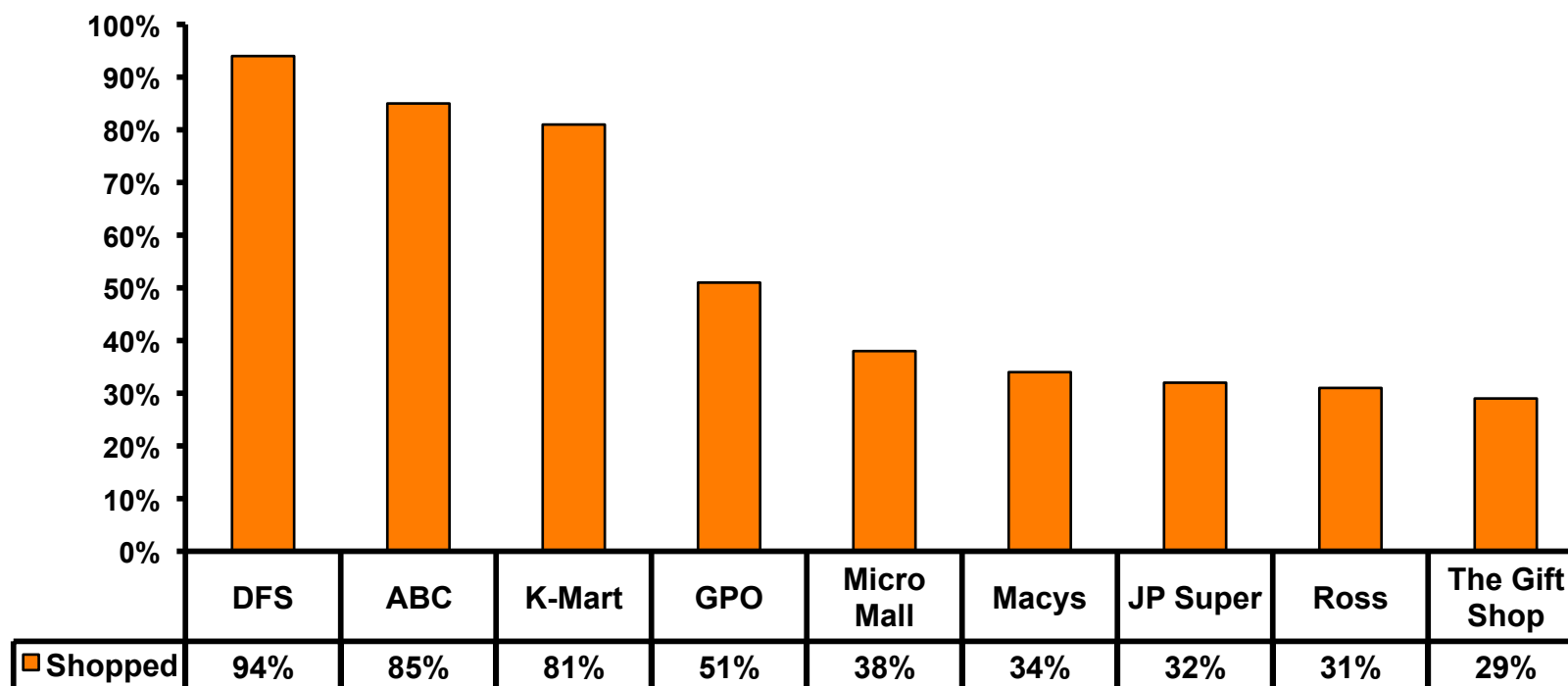
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

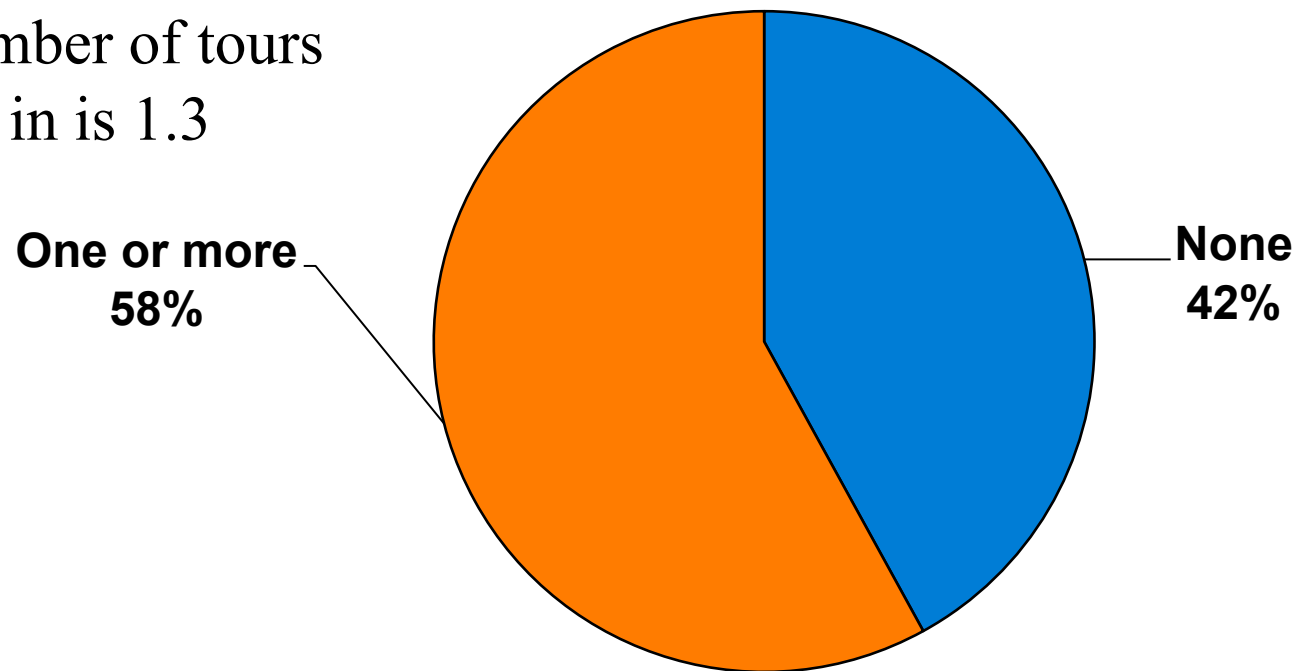
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 49%	Score of 6 to 7 = 42%
Score of 4 to 5 = 48%	Score of 4 to 5 = 51%
Score 1 to 3 = 4%	Score 1 to 3 = 8%
MEAN = 5.3	MEAN = 5.2

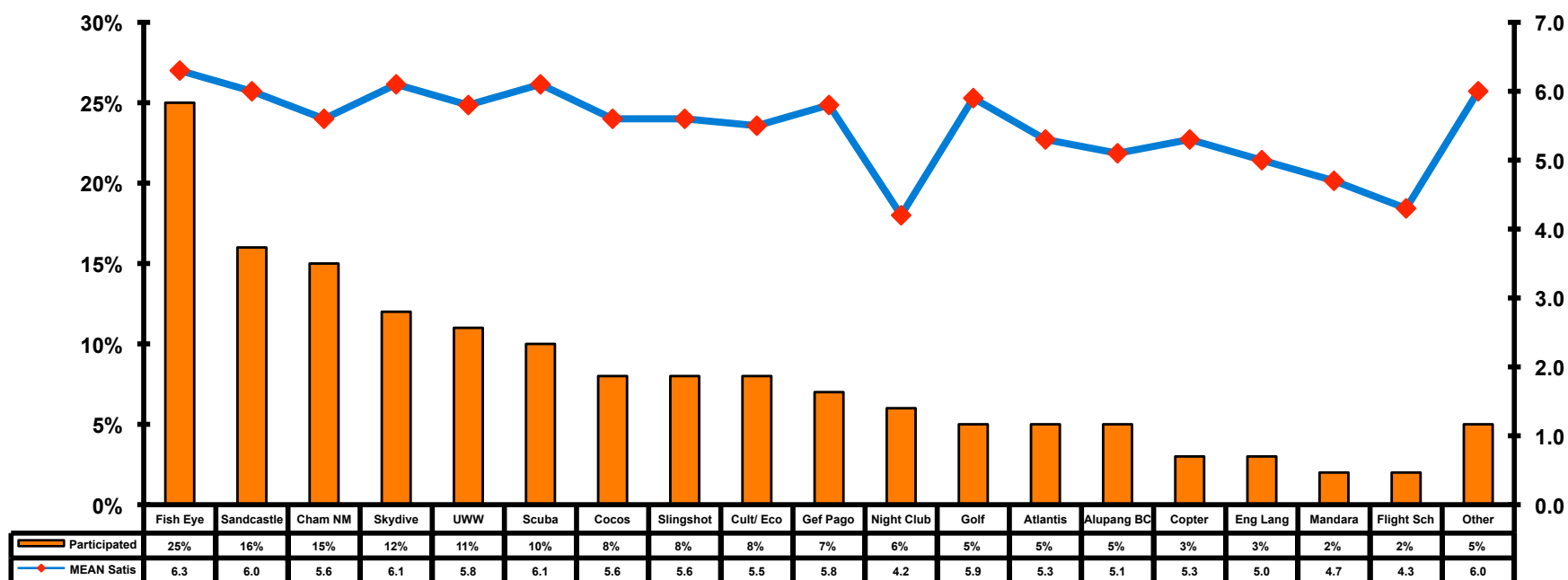
Optional Tour Participation

- Average number of tours participated in is 1.3



Optional Tours

Participation & Satisfaction



Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 62%	Score of 6 to 7 = 58%
Score of 4 to 5 = 36%	Score of 4 to 5 = 39%
Score 1 to 3 = 2%	Score 1 to 3 = 3%
MEAN = 5.6	MEAN = 5.5

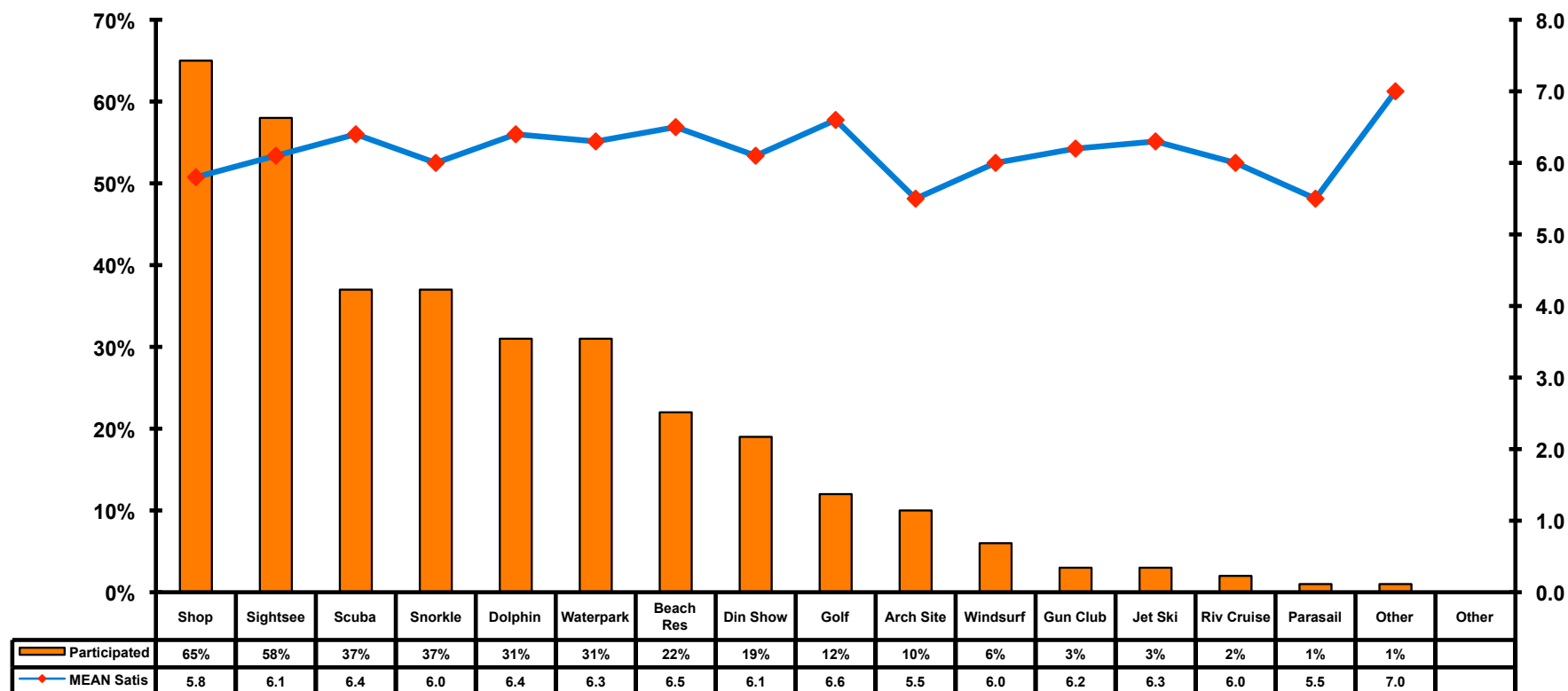
Night Tours Satisfaction

7pt Rating Scale

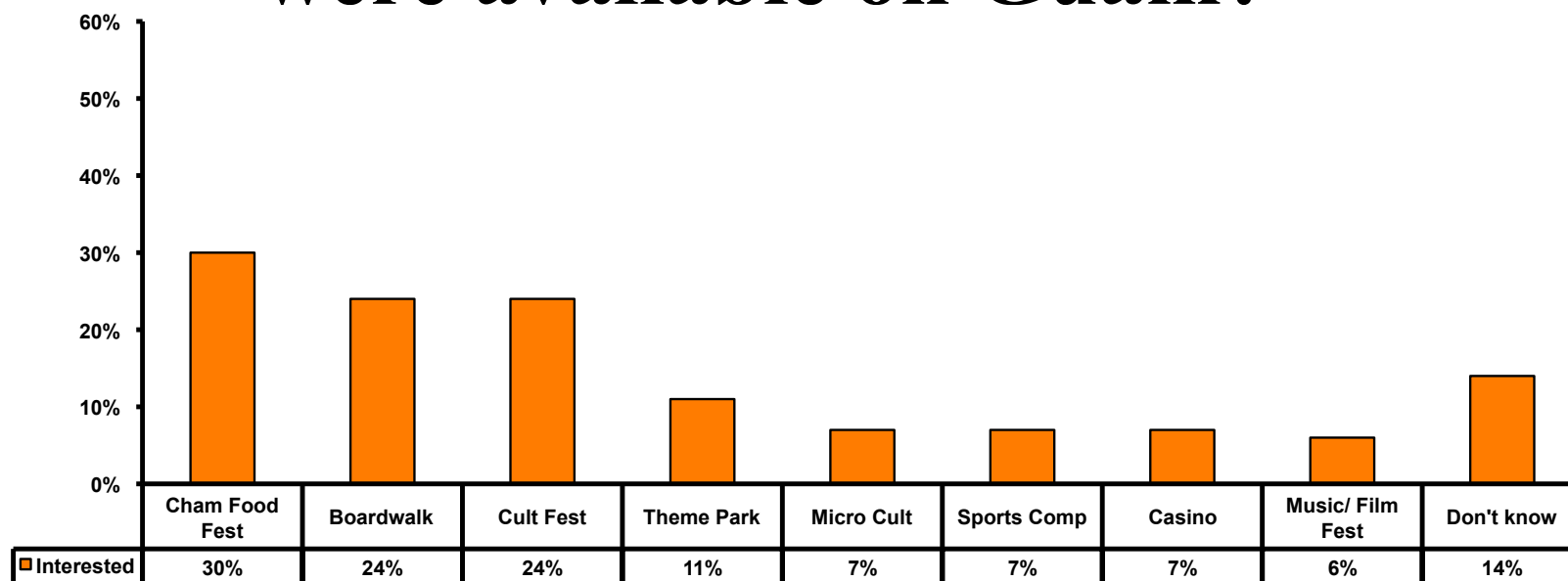
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 48%	Score of 6 to 7 = 45%
Score of 4 to 5 = 50%	Score of 4 to 5 = 55%
Score 1 to 3 = 1%	Score 1 to 3 = 1%
MEAN = 5.3	MEAN = 5.3

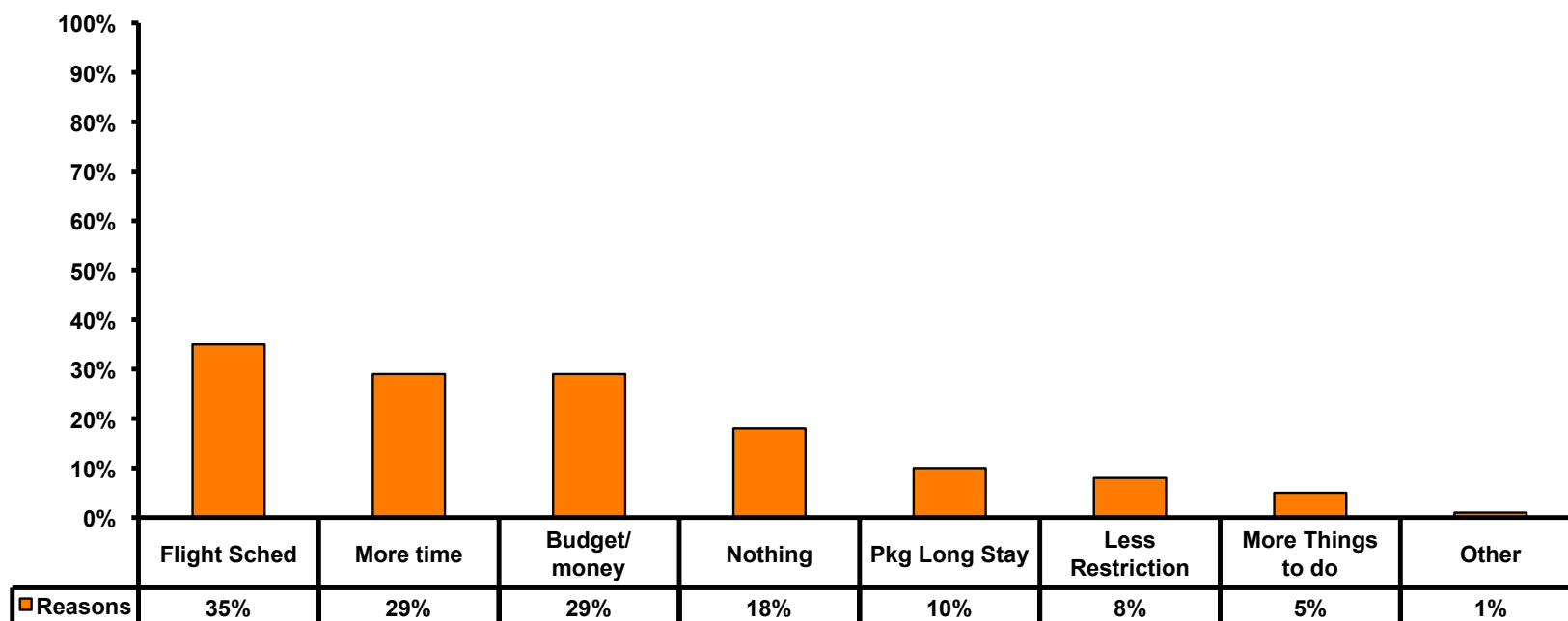
Satisfaction with Other Activities



Which activities or attractions would you most likely participate in if they were available on Guam?



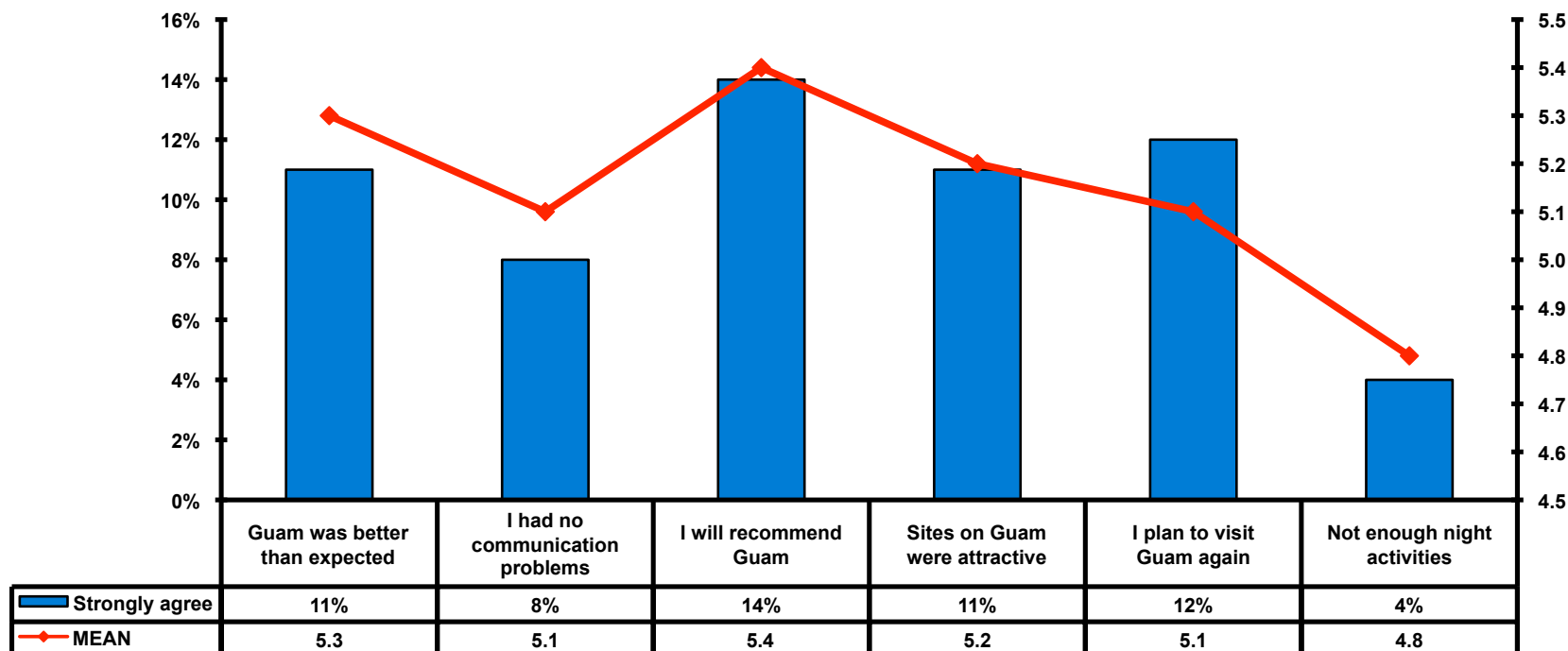
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

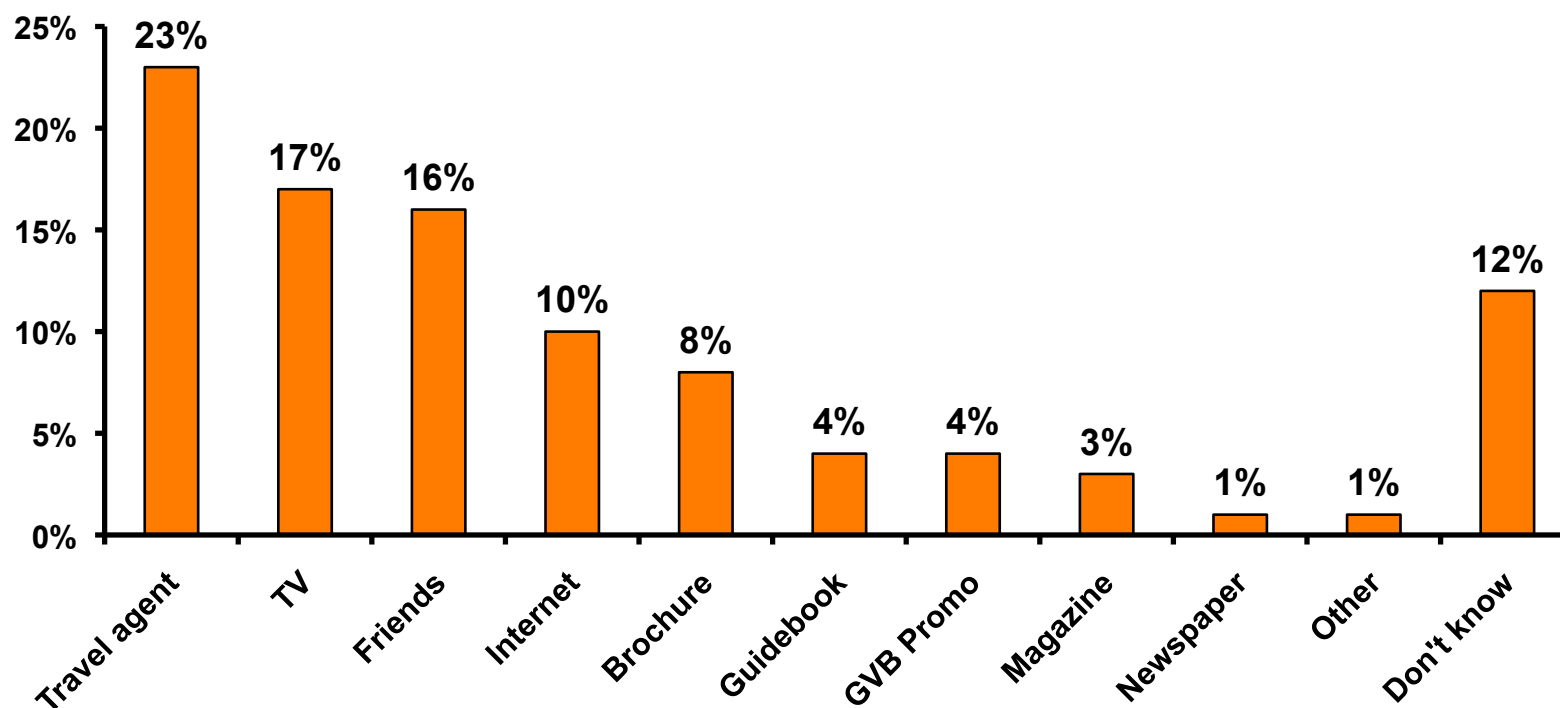
7=Very Satisfied/ 1=Very Dissatisfied



SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

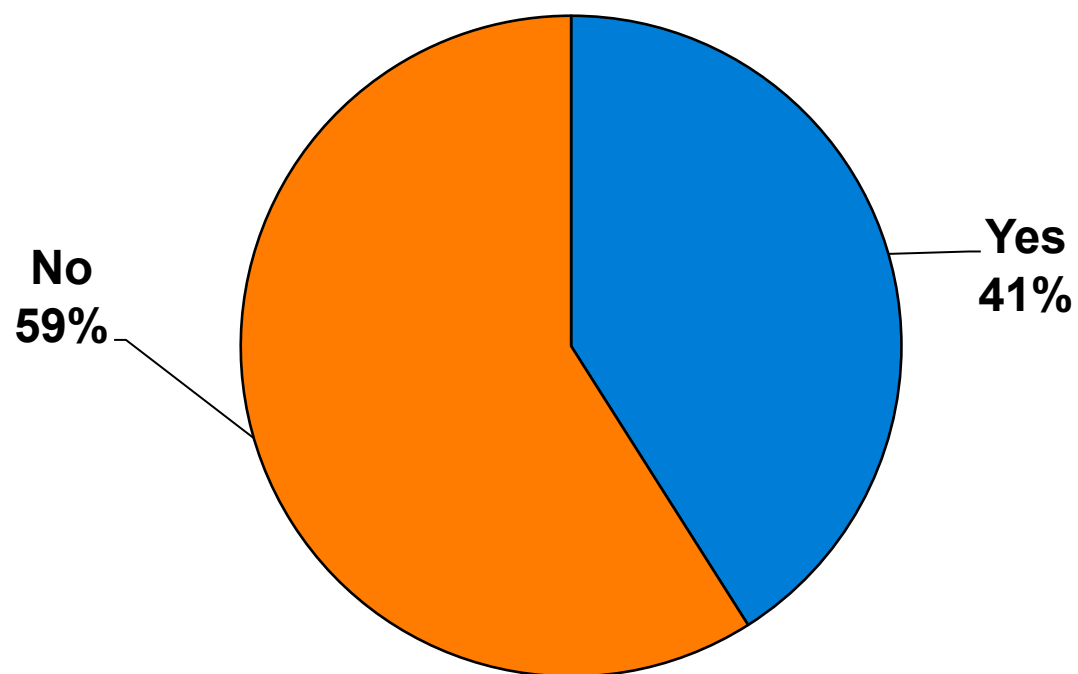


Marketing Recall

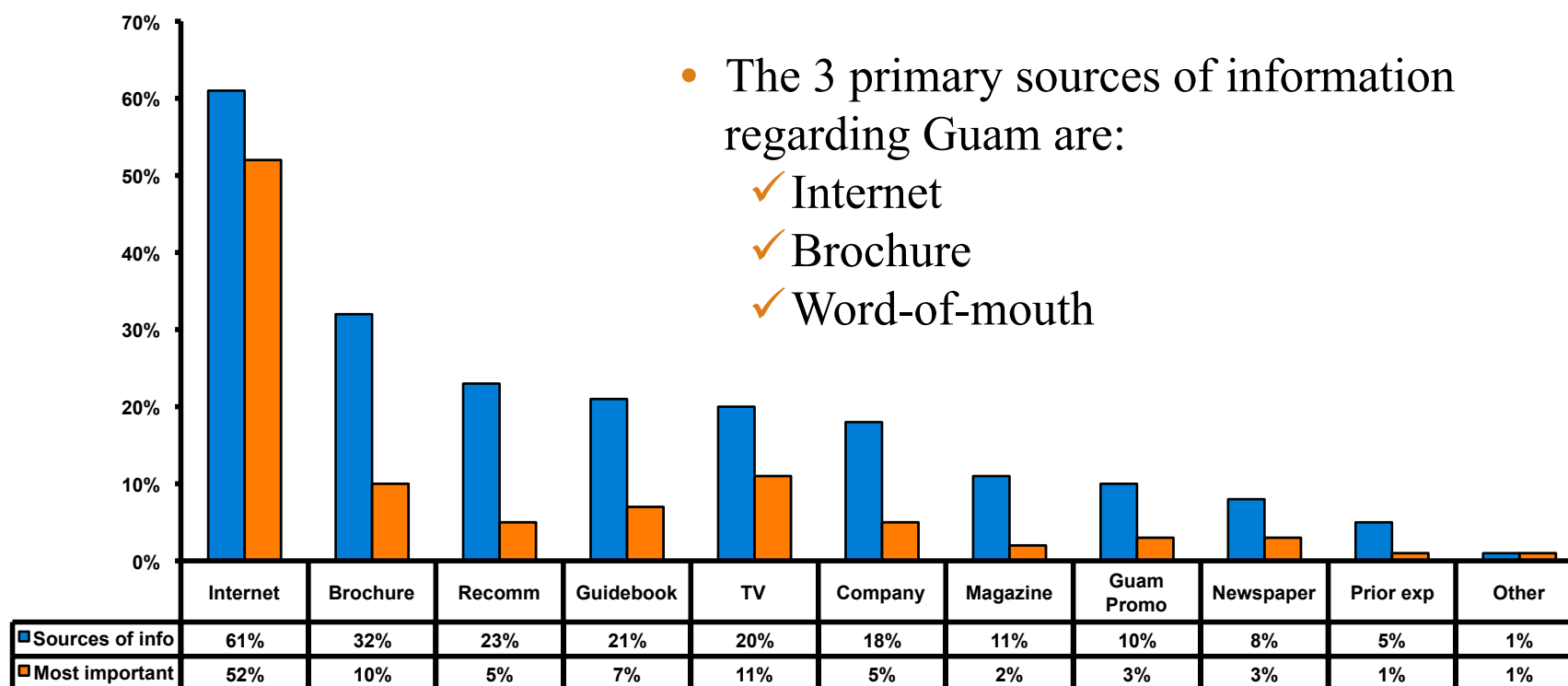
N=135

- 53% Image
- 42% Don't recall
- 4% Tag line
- 2% Other

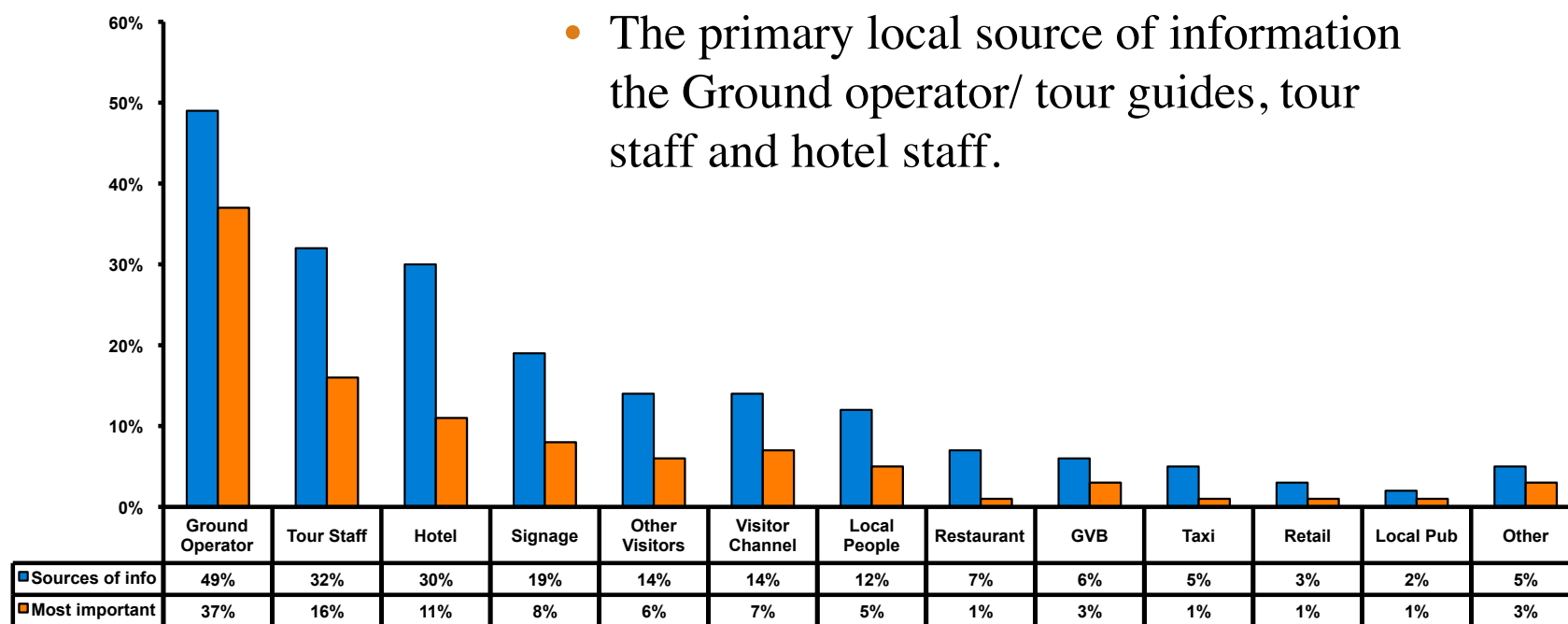
Visited GVB Website



Sources of Information Pre-arrival

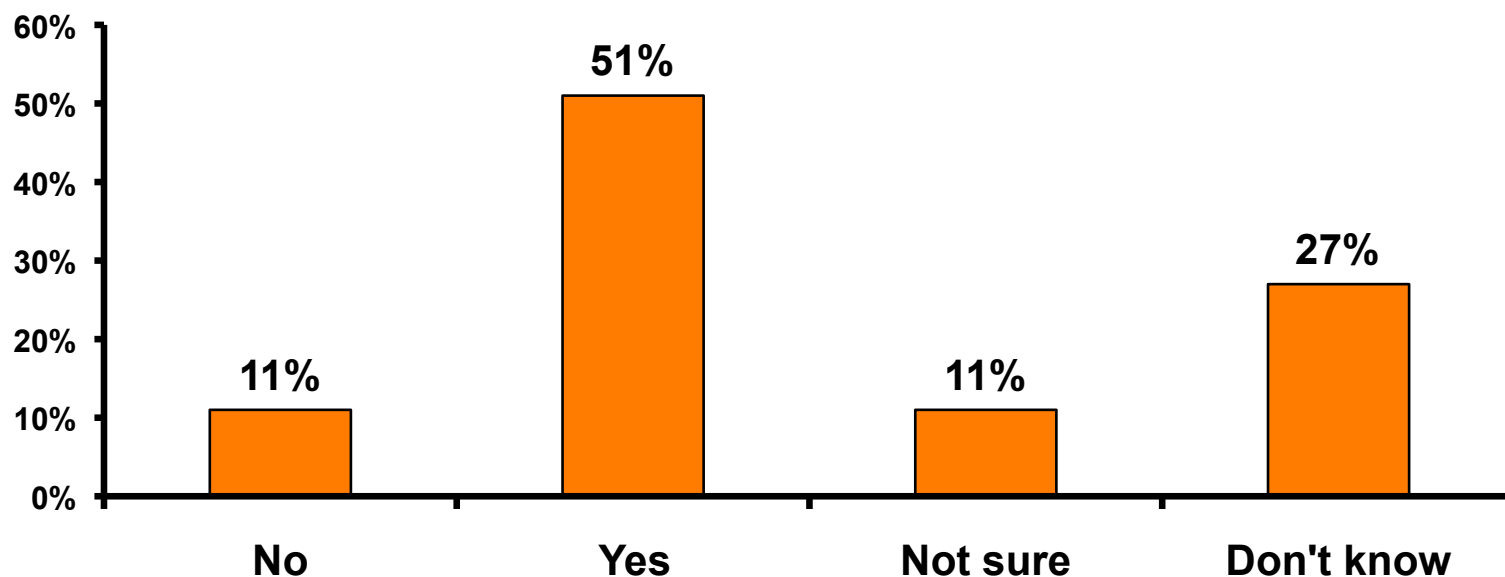


Sources of Information Post-arrival



SECTION 6 **OTHER ISSUES**

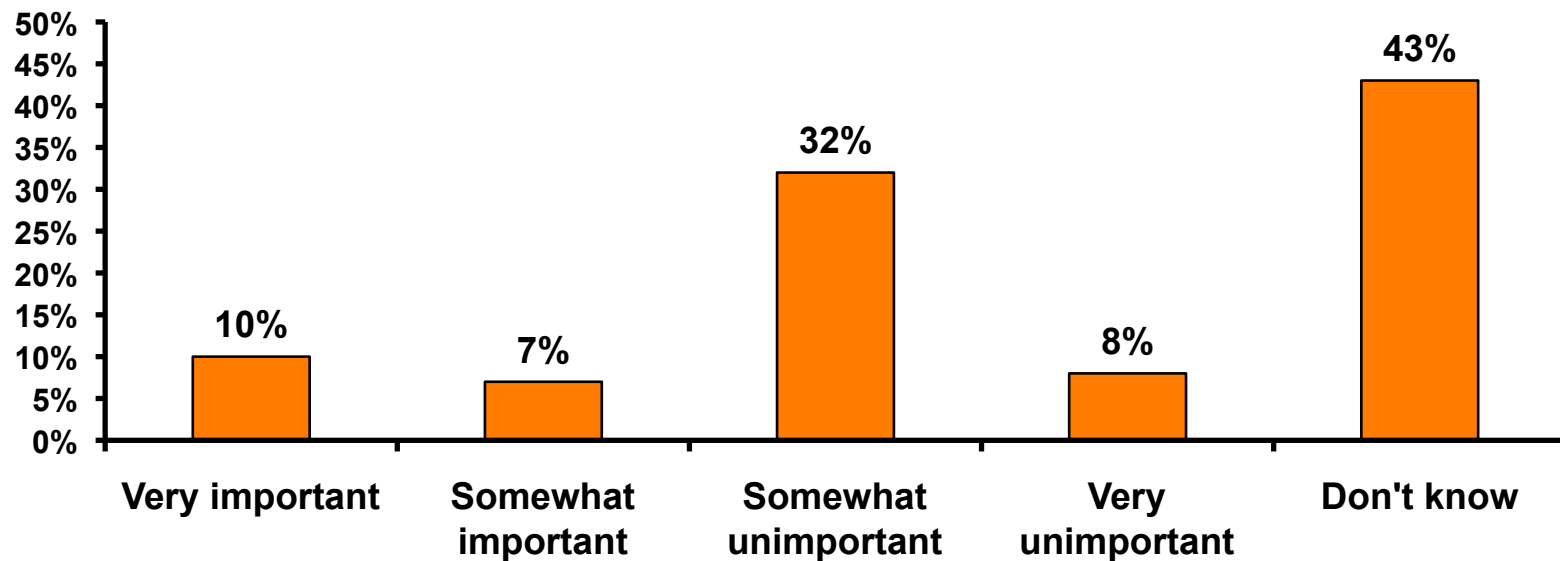
Good time to spend money on travel outside of Taiwan - Overall



Good time to spend money on travel outside of Taiwan by Age & Income

		AGE					PERSONAL INCOME			
		<20	20-29	30-39	40-49	50+	<20K	20K-60K	60K-100K	100K+
Q.22	No		11%	11%	14%		11%	9%	20%	13%
	Yes		53%	48%	57%	100%	44%	58%	70%	33%
	Not sure		7%	18%			8%	9%		29%
	Do not know	100%	29%	23%	29%		36%	23%	10%	25%
Total	Count	1	72	62	14	2	36	65	10	24

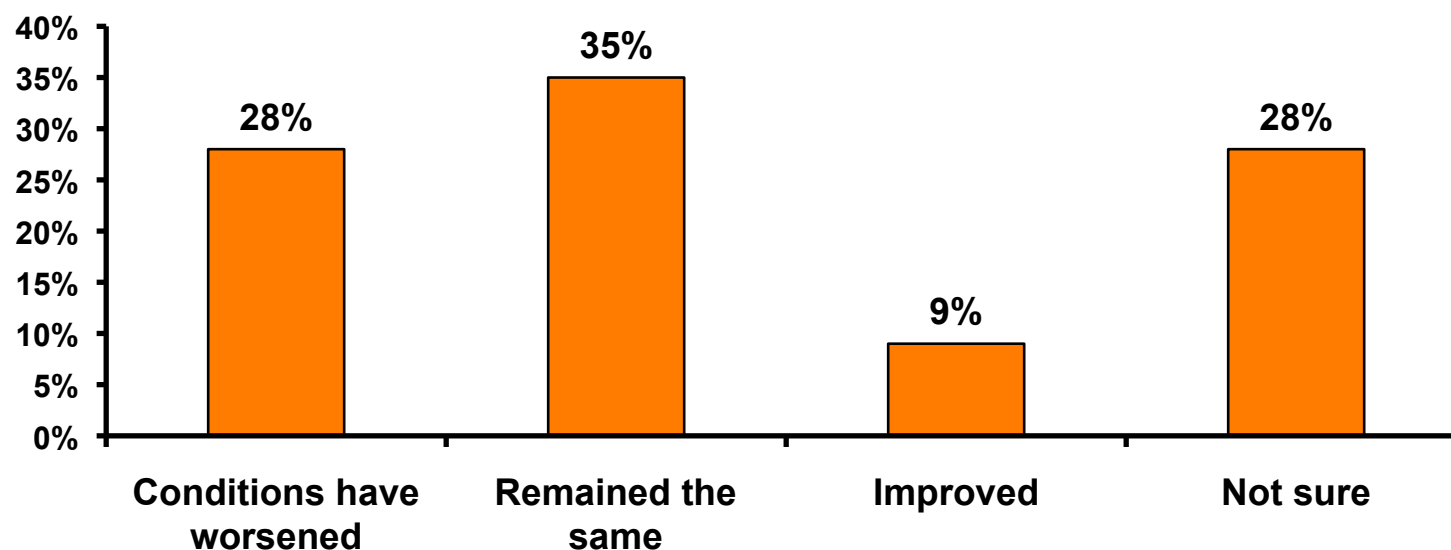
The importance of the state of the Taiwanese economy in decision to travel outside of Taiwan - Overall



The importance of the state of the Taiwanese economy in decision to travel outside of Taiwan by Age & Income

		AGE					PERSONAL INCOME			
		<20	20-29	30-39	40-49	50+	<20K	20K-60K	60K-100K	100K+
Q.23	Very unimportant	100%	8%	6%	7%		11%	3%	20%	17%
	Somewhat unimportant		32%	31%	43%	50%	28%	34%	40%	29%
	Somewhat important		7%	8%	7%		8%	9%	10%	
	Very important		7%	15%	7%		6%	14%	20%	8%
	Don't know		46%	40%	36%	50%	47%	40%	10%	46%
Total	Count	1	72	62	14	2	36	65	10	24

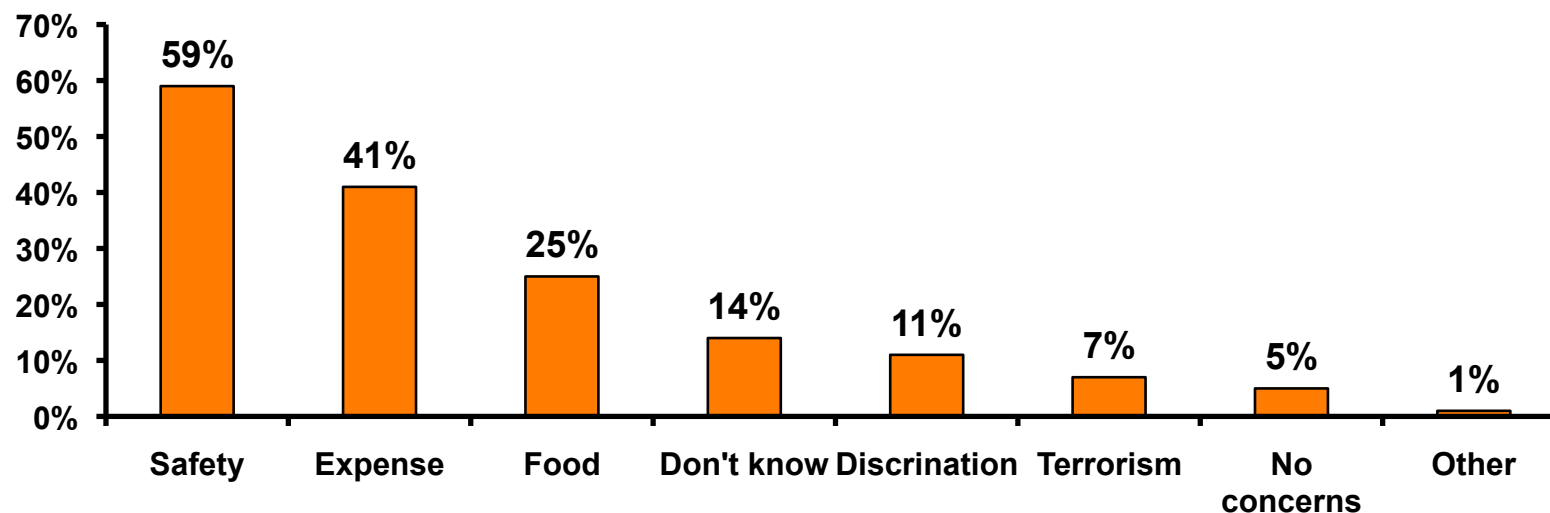
Rating Taiwanese Economy Compared to 12 months ago



Rating Taiwanese Economy Compared to 12 months ago by Age & Income

		AGE					PERSONAL INCOME			
		<20	20-29	30-39	40-49	50+	<20K	20K-60K	60K-100K	100K+
Q.21	Conditions have worsened		27%	32%	21%		22%	33%	30%	42%
	Conditions have remained the same		30%	39%	43%	50%	36%	28%	30%	33%
	Conditions have improved		13%	5%	7%	50%	11%	8%	10%	13%
	Do not know	100%	31%	24%	29%		31%	31%	30%	13%
Total	Count	1	71	62	14	2	36	64	10	24

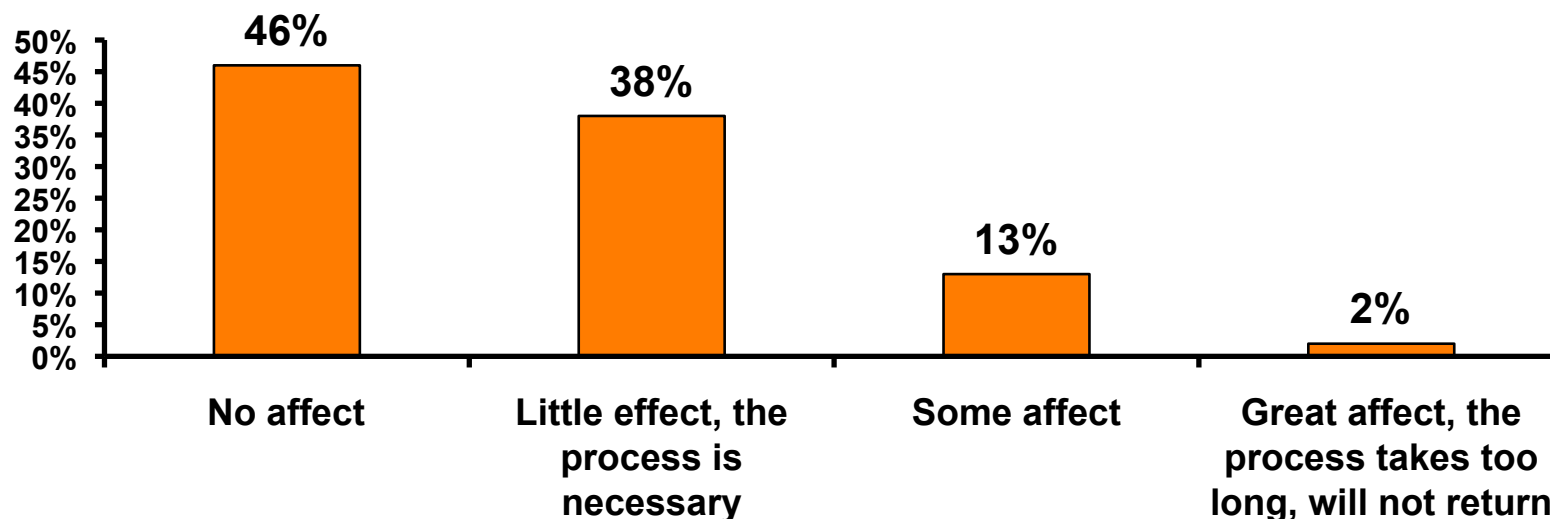
Concerns about travel outside of Taiwan - Overall



Concerns about travel outside of Taiwan - By Age & Income

		AGE					PERSONAL INCOME			
		<20	20-29	30-39	40-49	50+	<20K	20K-60K	60K-100K	100K+
Q.24	Safety at my destination	100%	50%	68%	57%	100%	44%	58%	80%	83%
	Expense		43%	42%	43%		39%	46%	40%	33%
	Food		25%	27%	21%		33%	18%	10%	33%
	Don't know		18%	10%	21%		19%	14%	10%	4%
	Discrimination against Taiwanese		10%	13%	14%		11%	12%		13%
	Terrorism		4%	11%			8%	9%		4%
	No concerns		7%	3%			11%	2%		8%
	Other		1%							4%
Total	Cases	1	72	62	14	2	36	65	10	24

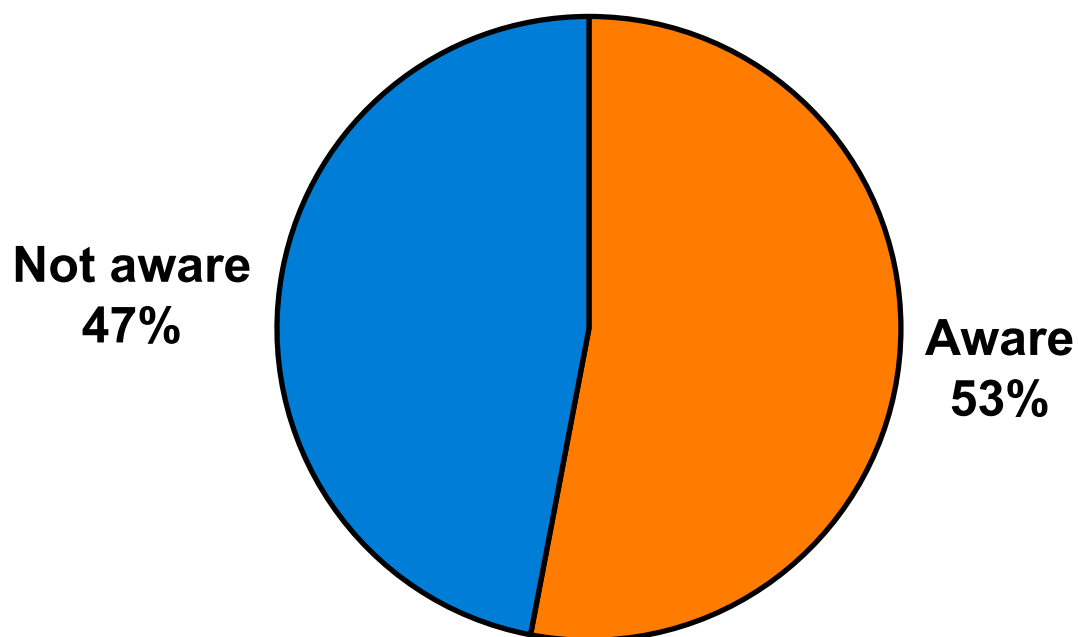
Security Screening/ Immigration Process at Guam International Airport



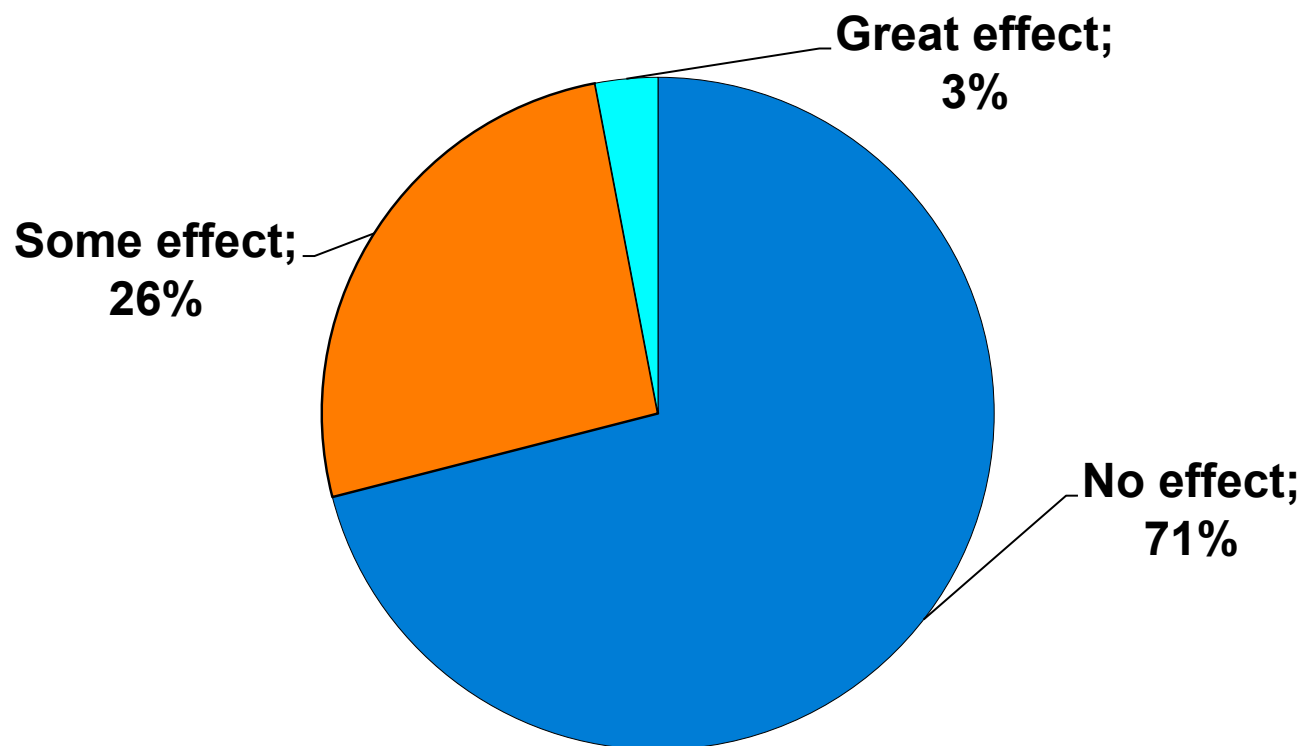
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **3.9** out of possible 7.0
- Agree (Score 6-7) – **29%**
- Neutral (Score 4-5) – **52%**
- Disagree (Score 1-3) – **16%**

Awareness of U.S. military troops moving from Japan to Guam



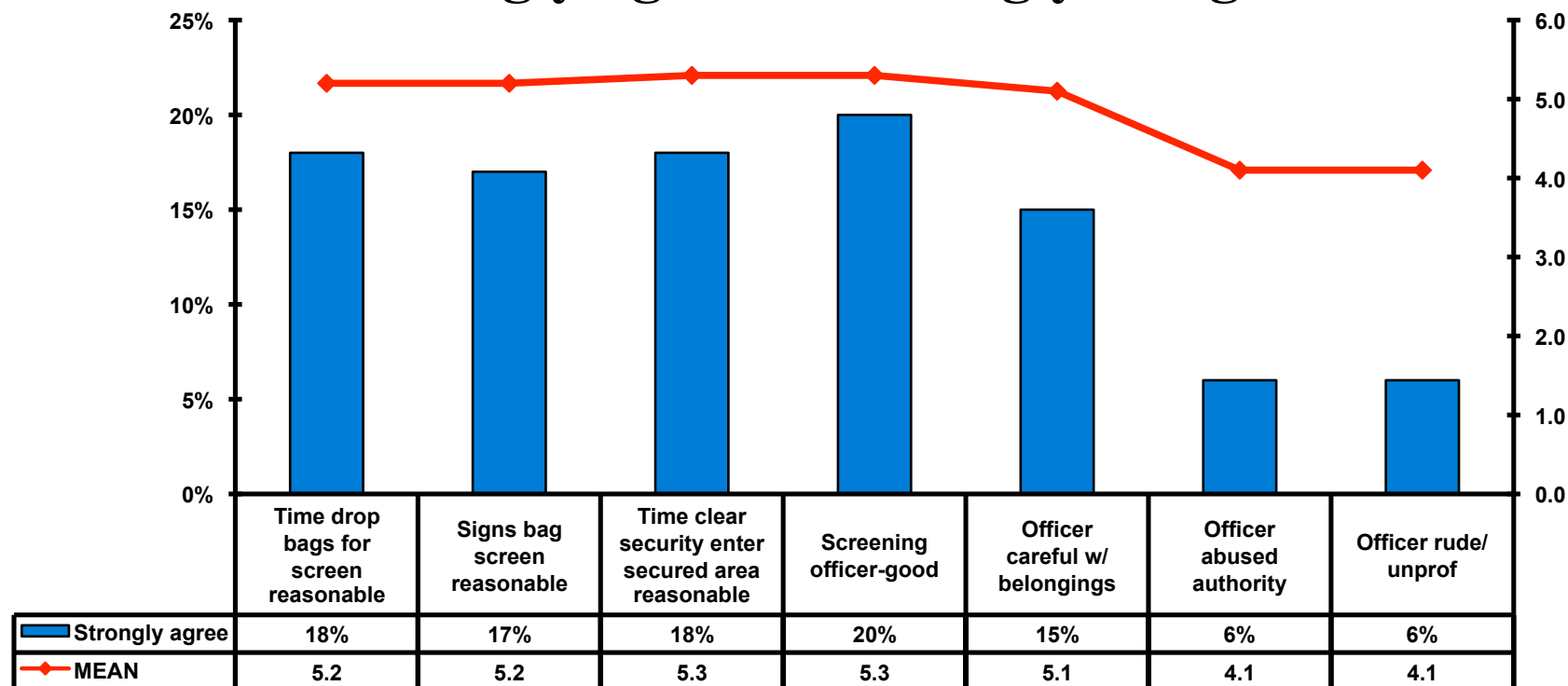
Effects of U.S. military troop movement on future trips to Guam



Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



Likelihood of travel outside of Taiwan within the next 6 to 24 months

