



# **GUAM VISITORS BUREAU**

## **Taiwan Visitor Tracker Exit Profile**

### **FY2012 MARKET SEGMENTATION –**

### **3RD Qtr**



**Prepared by: QMark Research**

*Information contained herein is the property of the Guam Visitors Bureau.*

*The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.*

# 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 +/- 8.0 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 Hong Kong visitors) the most important determinants of on-island spending; and
  - To identify the most significant factors affecting overall visitor satisfaction.

---

# Highlighted Segments Parameters

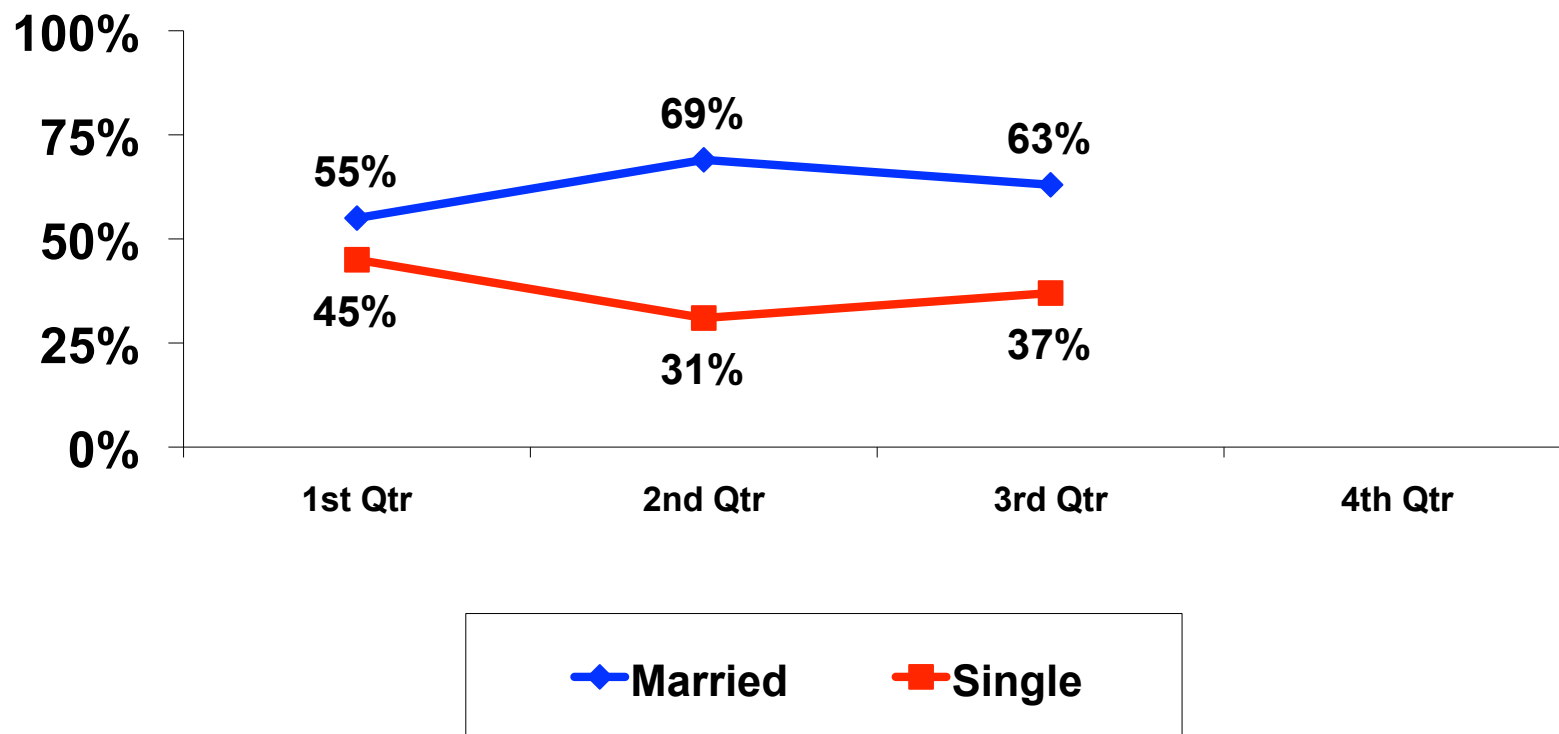
- General leisure group – Q.5A
- Family and/or Child – Q.6
- Special interest group – Q.18
- Incentive market – Q.5A/Q.7
- 20-40 year old – Q.E
- Mid-high level income – Q.35
- White-collar – Q.33
- W/child – Q.6
- Wedding/ Honeymoon – Q.5A/ Q.13
- Student – Q.18/ Q.33

# Highlighted Segments

	1 <sup>st</sup> QTR	2 <sup>nd</sup> QTR	3 <sup>rd</sup> QTR	4 <sup>th</sup> QTR
<b>General leisure group</b>	55%	29%	27%	
<b>Child</b>	3%	12%	12%	
<b>Special interest group</b>	3%	1%	1%	
<b>Incentive market</b>	3%	4%	8%	
<b>Male 20-40</b>	53%	41%	42%	
<b>Female 20-40</b>	38%	36%	36%	
<b>Mid-high level income</b>	7%	4%	5%	
<b>White collar</b>	71%	47%	55%	
<b>Families and/or child</b>	12%	25%	23%	
<b>Wedding/ Honeymooner</b>	35%	20%	21%	
<b>Student</b>	3%	2%	6%	
<b>TOTAL</b>	<b>154</b>	<b>154</b>	<b>154</b>	

# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status Tracking

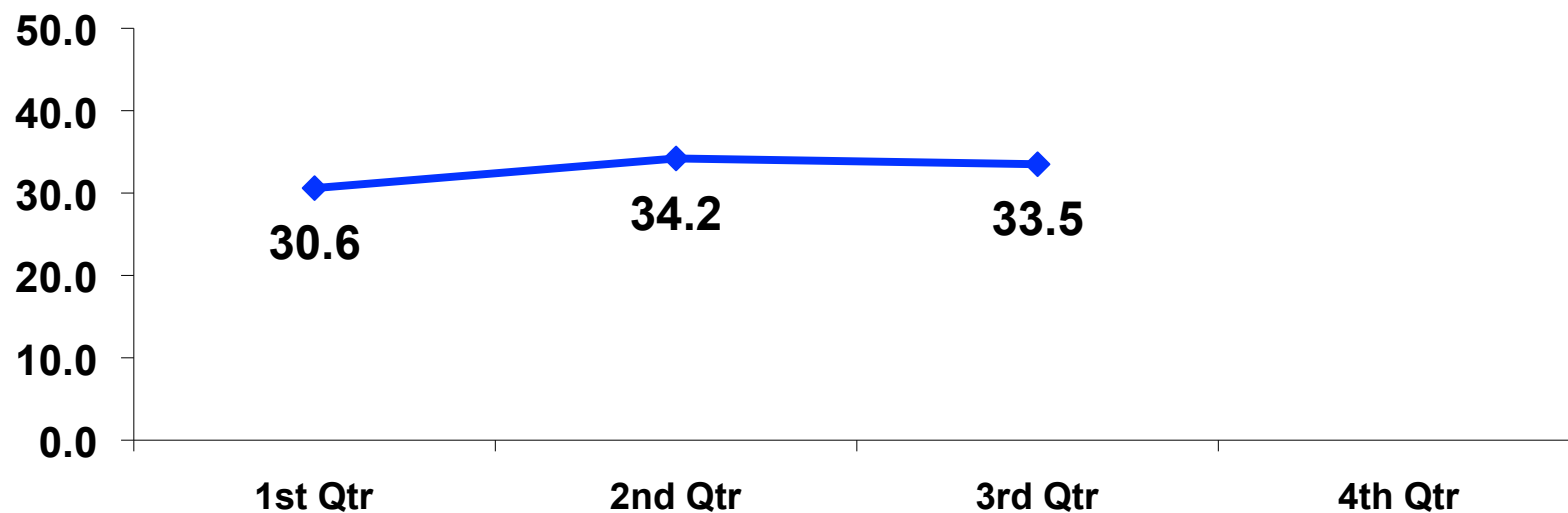


# Marital Status Segmentation

		TOTAL	GEN LEISURE GRP	TRVL CHILD	INCENTIVE MKT	SPEC INT GRP	MALE 20-40	FEMALE 20-40	WHITE COLLAR	FAMILY/ CHILD	WEDDING/HM	STUDENT	MID INCOME
D	Married	Count	97	20	16	9	37	30	53	25	20		7
		Col %	63%	49%	89%	75%	58%	54%	63%	69%	63%		100%
	Single	Count	57	21	2	3	27	26	31	11	12	9	
		Col %	37%	51%	11%	25%	42%	46%	37%	31%	38%	100%	
Total	Count		154	41	18	12	64	56	84	36	32	9	7



# Average Age Tracking



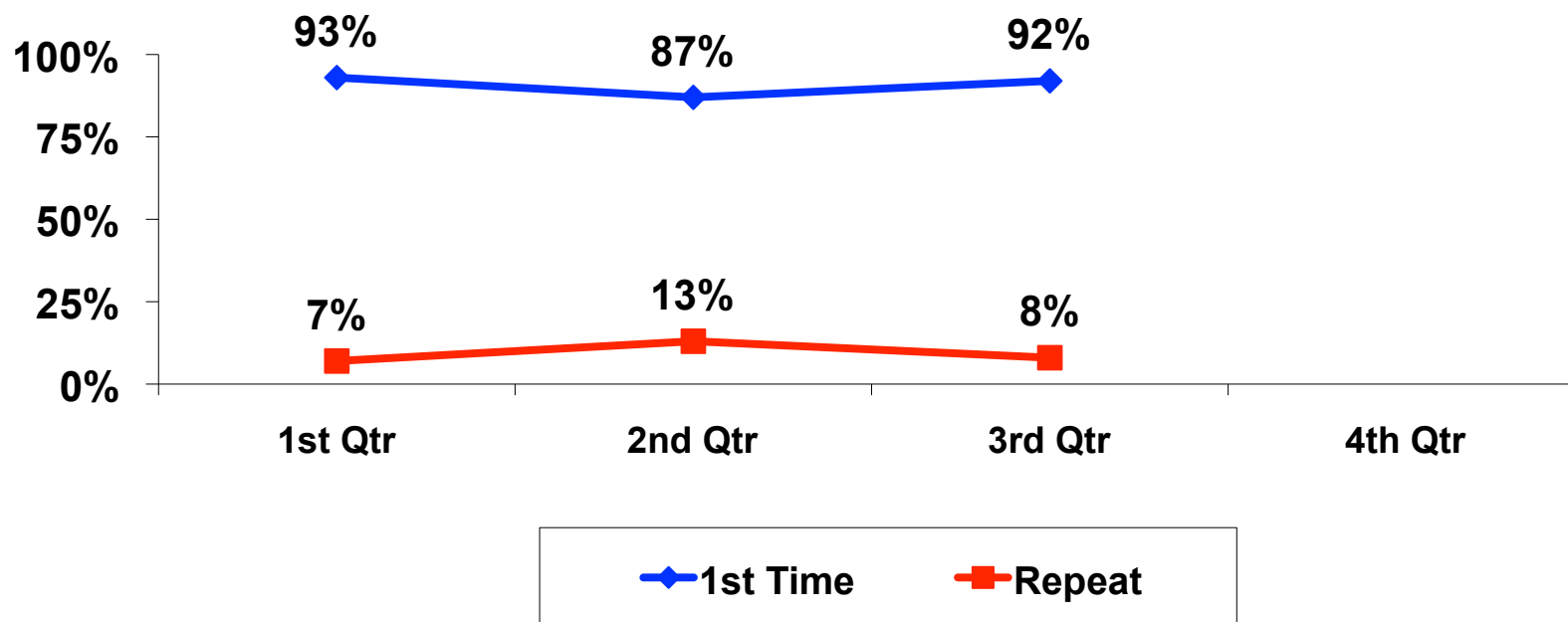
# Age Segmentation

			TOTAL	GEN LEISURE GRP	TRVL CHILD	INCENTIVE MKT	SPEC INT GRP	MALE 20-40	FEMALE 20-40	WHITE COLLAR	FAMILY/ CHILD	WEDDING/HM	STUDENT	MID INCOME
E	18-34	Count	88	26	7	8	1	44	42	54	15	24	9	1
		Col %	59%	65%	39%	67%	100%	69%	75%	66%	44%	75%	100%	17%
	35-54	Count	53	12	11	4		20	14	27	16	7		4
		Col %	36%	30%	61%	33%		31%	25%	33%	47%	22%		67%
	55+	Count	8	2						1	3	1		1
		Col %	5%	5%						1%	9%	3%		17%
Total	Count		149	40	18	12	1	64	56	82	34	32	9	6
E	Mean		33.5	32.0	36.0	32.1	32.0	30.7	29.9	32.2	36.9	30.1	21.0	40.7
	Median		32	30	39	33	32	30	30	32	37	29	20	40

# Income Segmentation

			TOTAL	GEN LEISURE GRP	TRVL CHILD	INCENTIVE MKT	SPEC INT GRP	MALE 20-40	FEMALE 20-40	WHITE COLLAR	FAMILY/ CHILD	WEDDING/HM	STUDENT	MID INCOME
Q.35	Less than NT476K	Count	10	5		1	1	3	6	7	2	1	2	
		Col %	10%	17%		14%	100%	7%	16%	11%	8%	5%	33%	
	476K-595K	Count	22	7		2		12	9	14	2	4	2	
		Col %	22%	24%		29%		27%	24%	22%	8%	21%	33%	
	595K-1,189K	Count	34	10	5	2		16	14	27	7	7		
		Col %	34%	34%	42%	29%		36%	38%	42%	28%	37%		
	1,189K-1,784K	Count	23	6	4	1		8	8	14	9	4	1	
		Col %	23%	21%	33%	14%		18%	22%	22%	36%	21%	17%	
	1,784K-2,379K	Count	6		2			2		1	4	1		6
		Col %	6%		17%			4%		2%	16%	5%		86%
	2,379K-2,973K	Count	1	1				1		1		1		1
		Col %	1%	3%				2%		2%		5%		14%
	2,973K+	Count	2		1	1		2			1	1		
		Col %	2%		8%	14%		4%			4%	5%		
	No Income	Count	1					1					1	
		Col %	1%					2%					17%	
Total	Count		99	29	12	7	1	45	37	64	25	19	6	7

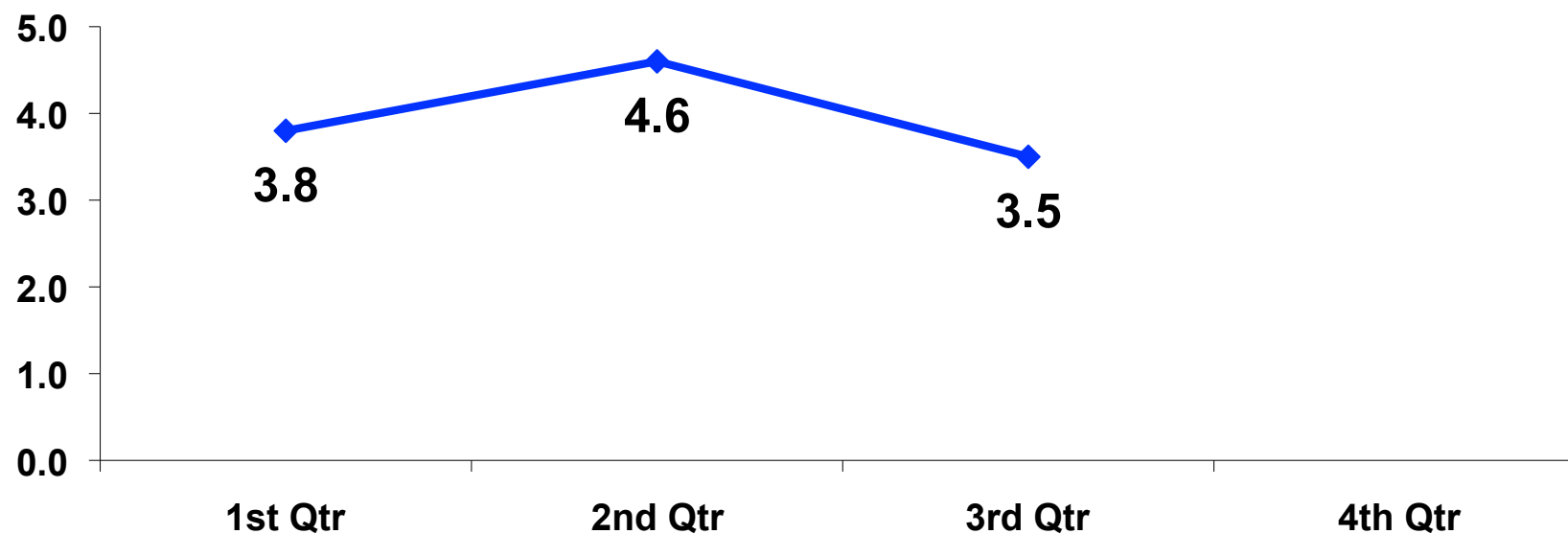
# Prior Trips to Guam Tracking



# Prior Trips to Guam Segmentation

			TOTAL	GEN LEISURE GRP	TRVL CHILD	INCENTIVE MKT	SPEC INT GRP	MALE 20-40	FEMALE 20-40	WHITE COLLAR	FAMILY/ CHILD	WEDDING/HM	STUDENT	MID INCOME
Q.3A	Yes	Count	141	39	14	10	1	58	52	77	31	31	8	6
		Col %	92%	95%	78%	83%	100%	92%	93%	93%	86%	97%	89%	86%
	No	Count	12	2	4	2		5	4	6	5	1	1	1
		Col %	8%	5%	22%	17%		8%	7%	7%	14%	3%	11%	14%
Total	Count		153	41	18	12	1	63	56	83	36	32	9	7

# Average Length of Stay



# Average Length of Stay Segmentation

	TOTAL	GEN LEISURE GRP	TRVL CHILD	INCENTIVE MKT	SPEC INT GRP	MALE 20-40	FEMALE 20-40	WHITE COLLAR	FAMILY/ CHILD	WEDDING/HM	STUDENT	MID INCOME
Q.8 Mean	3.5	3.2	3.5	3.1	3.0	3.5	3.4	3.5	3.5	3.6	3.1	3.7
Median	3	3	3	3	3	3	3	3	3	3	3	3
Minimum	3	3	3	3	3	3	3	3	3	3	3	3
Maximum	6	4	6	4	3	6	6	6	6	6	4	6

# SECTION 2 **TRAVEL PLANNING**



# Travel Planning Segmentation

			TOTAL	GEN LEISURE GRP	TRVL CHILD	INCENTIVE MKT	SPEC INT GRP	MALE 20-40	FEMALE 20-40	WHITE COLLAR	FAMILY/ CHILD	WEDDING/HM	STUDENT	MID INCOME
Q.7	Full package	Count	40	12	4			17	12	19	10	9	3	2
	tours	Col %	27%	29%	22%			27%	22%	23%	28%	31%	33%	29%
	Free-time	Count	59	16	8		1	20	28	30	17	9	6	3
	package tours	Col %	39%	39%	44%		100%	32%	52%	37%	47%	31%	67%	43%
	Individually	Count	38	12	3			20	9	23	6	11		2
	arranged travel	Col %	25%	29%	17%			32%	17%	28%	17%	38%		29%
	Group tour	Count	4		2	3		3		1	2			
		Col %	3%		11%	25%		5%		1%	6%			
	Company paid	Count	9	1	1	9		3	5	8	1			
	travel	Col %	6%	2%	6%	75%		5%	9%	10%	3%			
Total	Count		150	41	18	12	1	63	54	81	36	29	9	7

# Travel Motivation Segmentation

		TOTAL	GEN LEISURE GRP	TRVL CHILD	INCENTIVE MKT	SPEC INT GRP	MALE 20-40	FEMALE 20-40	WHITE COLLAR	FAMILY/ CHILD	WEDDING/HM	STUDENT	MID INCCME
Q.5	Beautiful seas, beaches, tropical climate	59%	76%	56%	50%	100%	58%	64%	56%	64%	47%	100%	29%
	Just to relax	24%	90%	39%	8%		23%	27%	24%	31%	22%	44%	14%
	Recommendation of friend, relative, travel agency	24%	34%	22%	25%	100%	20%	27%	26%	25%	19%	67%	29%
	Water sports	15%	34%	22%	8%	100%	16%	16%	17%	19%	9%	44%	14%
	SCUBA diving	17%	27%	22%	8%	100%	16%	16%	14%	19%	13%	33%	
	Shopping	16%	20%	11%	25%		19%	16%	19%	11%	19%	22%	29%
	It is a safe place to spend a vacation	14%	22%	11%	8%		16%	15%	15%	11%	6%	11%	
	Price of the tour package	14%	10%	11%	8%		14%	15%	12%	19%	3%		14%
	To get married or Attend wedding	7%	7%	6%			5%	9%	1%	17%	34%	22%	14%
	Pleasure	7%	22%		17%		6%	7%	4%	8%	9%	22%	
	Honeymoon	6%	5%				6%	9%	7%		28%		14%
	Short travel time	7%	7%	11%			6%	9%	5%	11%	6%		14%
	Promotional materials from GVB	5%	7%				8%	4%	6%	6%	3%	11%	14%
	A previous visit	5%	2%	6%	8%		3%	5%	5%	6%		11%	14%
	To golf	4%	5%	6%			3%	2%	5%	3%			
	To visit friends or relatives	3%	2%	6%			2%	2%	2%	6%	3%		
	Other	3%			8%		3%	4%	5%				
	Company or Business trip	1%			17%		2%	2%	1%				
	Special promotion	1%		6%						3%			14%
Total	Cases	153	41	18	12	1	64	55	84	36	32	9	7

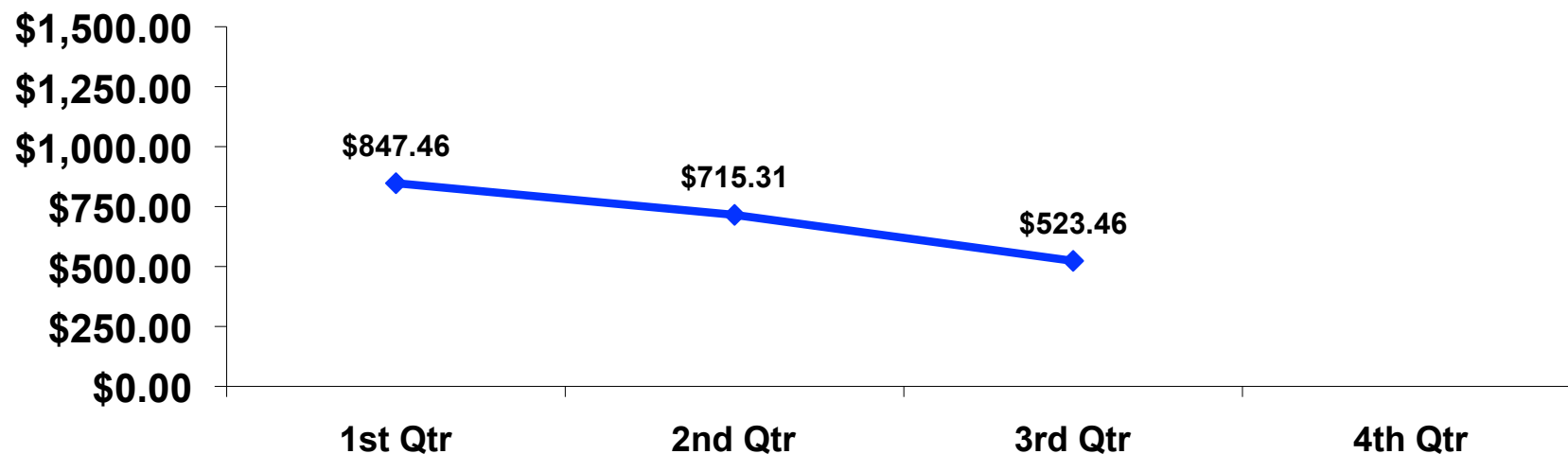
# Information Sources

## Segmentation

		TOTAL	GEN LEISURE GRP	TRVL CHILD	INCENTIVE MKT	SPEC INT GRP	MALE 20-40	FEMALE 20-40	WHITE COLLAR	FAMILY/ CHILD	WEDDING/HM	STUDENT	MID INCCME
Q.1	Internet	58%	46%	44%	25%	100%	58%	71%	62%	44%	72%	56%	29%
	Travel agent brochure	35%	44%	44%	42%		33%	38%	29%	44%	47%	44%	29%
	Friend or relative	22%	39%	11%	17%	100%	27%	20%	25%	22%	28%	67%	29%
	Travel guide book at bookstores	14%	20%		17%		23%	9%	15%	6%	13%	11%	14%
	Company travel department	12%	17%	11%	42%		17%	9%	14%	8%	9%		29%
	TV	12%	17%	11%	8%		16%	7%	11%	8%	16%	22%	14%
	Newspaper	14%	10%	11%			6%	9%	10%	14%	13%	11%	14%
	Magazine	11%	12%		8%		8%	7%	11%	8%	19%	11%	43%
	Guam promo activities	9%	20%	6%	17%		6%	16%	10%	11%	6%	22%	
	I have been to Guam before	6%	5%	22%	17%		8%	5%	5%	14%	3%	11%	14%
Total	Cases	154	41	18	12	1	64	56	84	36	32	9	7

# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures Tracking

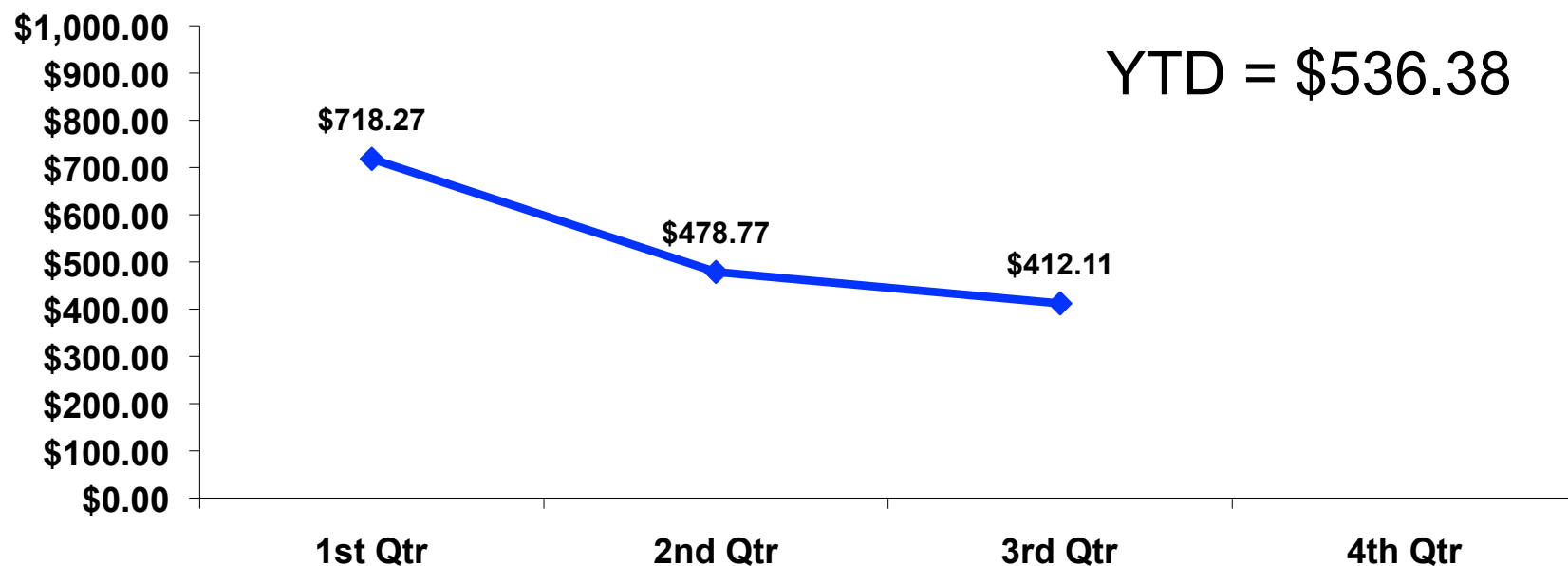


YTD=\$695.41

# Prepaid Expenditures Per Person Segmentation

		TOTAL	GEN LEISURE GRP	TRVL CHILD	INCENTIVE MKT	SPEC INT GRP	MALE 20-40	FEMALE 20-40	WHITE COLLAR	FAMILY/ CHILD	WEDDING/HM	STUDENT	MID INCOME
Prepaid	Mean	\$523.46	\$613.56	\$600.39	\$425.89	\$974.95	\$586.68	\$531.01	\$528.38	\$586.15	\$491.81	\$629.62	\$717.67
per	Median	\$581	\$697	\$635	\$220	\$975	\$650	\$578	\$599	\$656	\$0	\$683	\$812
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$974.95	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
converted to \$	Maximum	\$1,760.32	\$1,760.32	\$1,760.32	\$1,404.87	\$974.95	\$1,730.70	\$1,760.32	\$1,760.32	\$1,760.32	\$1,730.70	\$1,141.16	\$1,033.28

# On-Island Expenditures Tracking



# On-Island Expenditures Per Person Segmentation

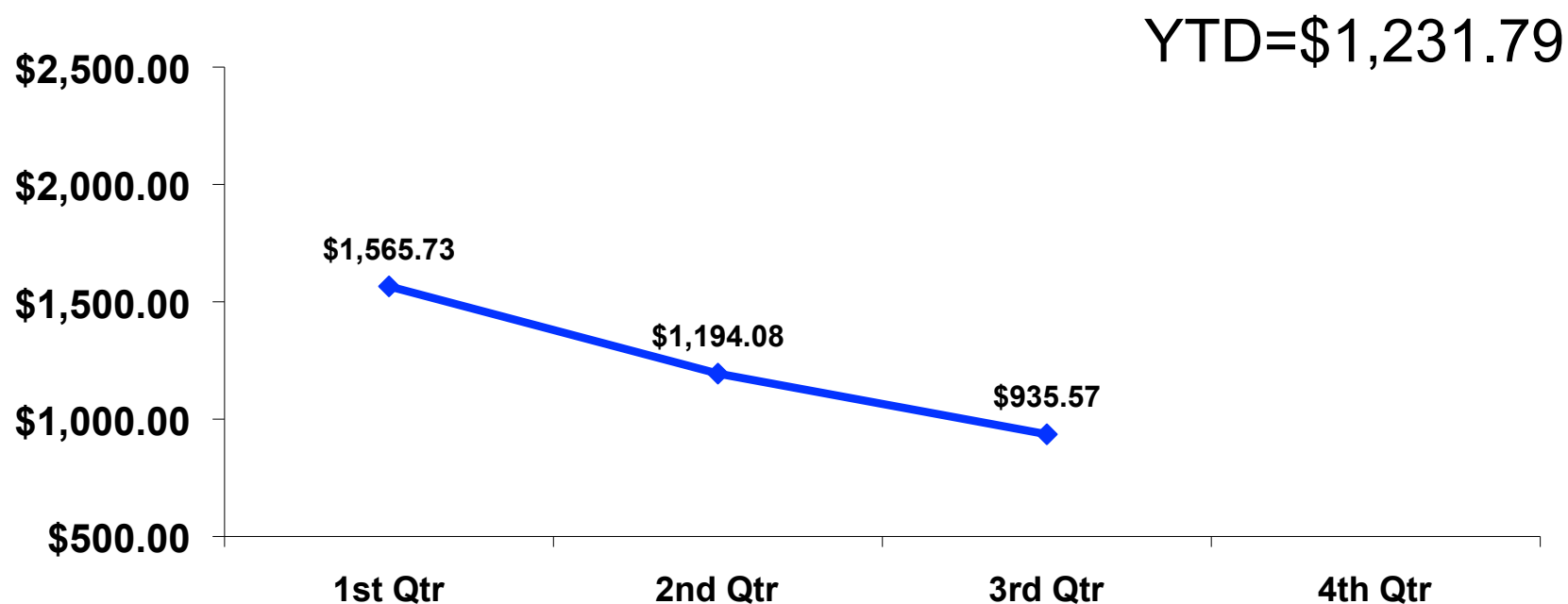
		TOTAL	GEN LEISURE GRP	TRVL CHILD	INCENTIVE MKT	SPEC INT GRP	MALE 20-40	FEMALE 20-40	WHITE COLLAR	FAMILY/ CHILD	WEDDING/HM	STUDENT	MID INCOME
Per person on-island exp	Mean	\$412.11	\$433.36	\$370.56	\$374.94	\$167.00	\$474.41	\$428.71	\$488.02	\$323.15	\$622.11	\$308.33	\$261.48
	Median	\$263	\$333	\$300	\$215	\$167	\$300	\$287	\$300	\$221	\$248	\$383	\$166
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$167.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$34.00	\$0.00
	Maximum	\$5,000.00	\$1,667.00	\$1,000.00	\$1,360.00	\$167.00	\$5,000.00	\$3,347.00	\$5,000.00	\$1,252.00	\$5,000.00	\$680.00	\$993.50



# On-Island Expense Breakdown

		TOTAL	GEN LEISURE GRP	TRVL CHILD	INCENTIVE MKT	SPEC INT GRP	MALE 20-40	FEMALE 20-40	WHITE COLLAR	FAMILY/ CHILD	WEDDING/HM	STUDENT	MID INCOME
F&B-HOTEL	Mean	\$36.76	\$12.68	\$57.39	\$5.25	\$0.00	\$38.80	\$26.43	\$35.21	\$52.31	\$44.69	\$0.00	\$126.14
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F&B-FF	Mean	\$25.12	\$33.76	\$69.44	\$32.50	\$0.00	\$40.44	\$11.77	\$18.93	\$46.78	\$33.44	\$22.22	\$25.71
REST/CONV	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00
F&B-OUT- SIDE	Mean	\$28.89	\$41.29	\$97.22	\$23.58	\$0.00	\$37.90	\$26.27	\$21.68	\$65.29	\$30.02	\$14.00	\$30.00
HOTEL/ REST	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OPTIONAL	Mean	\$89.09	\$90.10	\$79.94	\$26.67	\$0.00	\$79.93	\$98.39	\$99.44	\$74.15	\$122.45	\$167.78	\$171.57
TOUR	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$210.00	\$0.00
GIFT/	Mean	\$94.79	\$112.17	\$154.61	\$65.33	\$0.00	\$71.94	\$160.68	\$120.64	\$97.42	\$176.03	\$76.00	\$81.00
SOUV-SELF	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
GIFT/SOUV-	Mean	\$72.24	\$134.44	\$105.56	\$136.08	\$0.00	\$55.83	\$86.70	\$64.27	\$156.50	\$60.69	\$53.00	\$43.43
F&F AT HOME	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
LOCAL TRANS	Mean	\$6.55	\$11.85	\$7.33	\$2.83	\$0.00	\$7.41	\$7.89	\$5.12	\$12.36	\$12.03	\$2.44	\$14.57
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$287.82	\$226.20	\$375.61	\$127.83	\$167.00	\$416.44	\$194.69	\$370.82	\$236.40	\$554.09	\$31.56	\$132.71
	Median	\$0.00	\$0.00	\$317.00	\$0.00	\$167.00	\$5.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

# Total Expenditures Tracking



# Total Expenditures Per Person Segmentation

		TOTAL	GEN LEISURE GRP	TRVL CHILD	INCENTIVE MKT	SPEC INT GRP	MALE 20-40	FEMALE 20-40	WHITE COLLAR	FAMILY/ CHILD	WEDDING/HM	STUDENT	MID INCOME
TOTPP	Mean	\$935.57	\$1,046.92	\$970.94	\$800.84	\$1,141.95	\$1,061.09	\$959.72	\$1,016.40	\$909.30	\$1,113.92	\$937.95	\$979.15
	Median	977.92	1072.36	997.63	678.75	1141.95	1140.52	966.44	1049.80	997.63	562.15	1073.28	1039.63
	Minimum	.00	.00	.00	.00	1141.95	.00	.00	.00	.00	.00	34.00	.00
	Maximum	6730.70	2760.32	2760.32	2014.56	1141.95	6730.70	4362.57	6730.70	2760.32	6730.70	1524.16	1805.96

# 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.

<b>Drivers of Overall Satisfaction, 1st, 2nd and 3rd Quarter 2012 and Overall 2012</b>				
Drivers:	1st Qtr 2012	2nd Qtr 2012	3rd Qtr 2012	Overall 2012
Cleanliness of beaches & parks			<b>2</b>	
Ease of getting around		2		
Safety walking around at night				
Quality of daytime tours				1
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours			<b>3</b>	
Quality of shopping				
Variety of shopping	2	1		2
Price of things on Guam	4			
Quality of hotel accommodations			<b>1</b>	3
Quality/cleanliness of air - sky				
Quality/cleanliness of parks				
Quality of landscape	3			
Quality of ground handler	1			
Quality of transportation vehicles	5			4
% of Overall Satisfaction Accounted For	71.3%	48.6%	<b>28.4%</b>	44,7%
NOTE: Only significant drivers are included.				

# Drivers of Overall Satisfaction

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by three significant factors in the third quarter 2012 Period. By rank order they are:
  - **Quality of hotel accommodations,**
  - **Cleanliness of beaches and parks, and**
  - **Variety of night time tours.**
- With all three factors the overall  $r^2$  is .284 meaning that **28.4% of overall satisfaction is accounted for by these three factors.**

<b>Drivers of Per Person On Island Expenditures, 1st, 2nd and 3rd Quarters 2012 &amp; Overall 2012</b>				
Drivers:	1st Qtr 2012	2nd Qtr 2012	3rd Qtr 2012	Overall 2012
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		1		
Quality of shopping				1
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations				
Quality/cleanliness of air - sky				
Quality/cleanliness of parks				
Quality of landscape				
Quality of ground handler				
Quality of transportation vehicles				
% of Per Person On Island Expenditures Accounted For	0.0%	2,7%	<b>0.0%</b>	2.1%
NOTE: Only significant drivers are included.				



# Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** of Taiwan visitors on Guam is driven by no significant factors in the third quarter 2012 Period.