



# **GUAM VISITORS BUREAU**

## **Taiwan Visitor Tracker Exit Profile**

### **3rd Qtr (April-June 2012)**



**Prepared by: QMark Research**

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# Background & Methodology

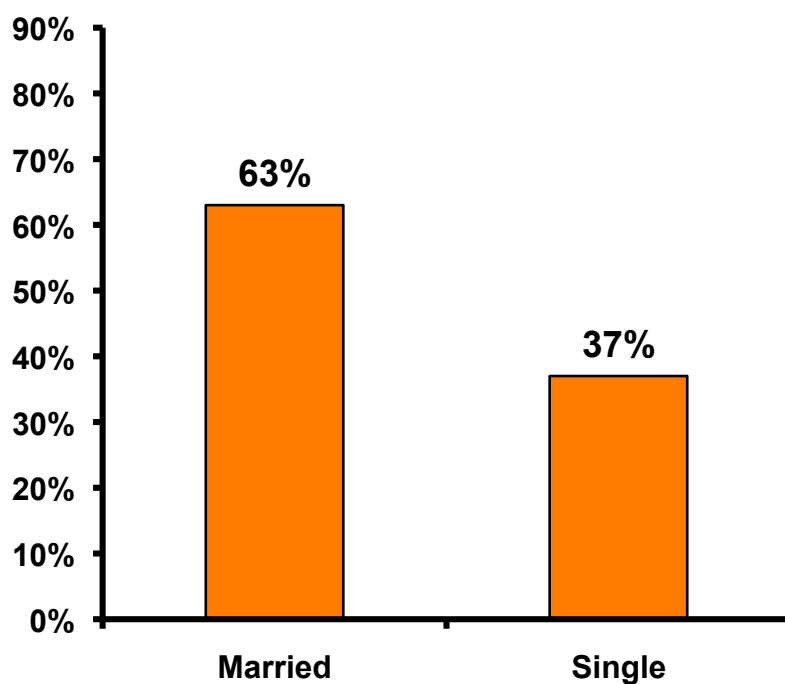
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Chinese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **154** departing Taiwanese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

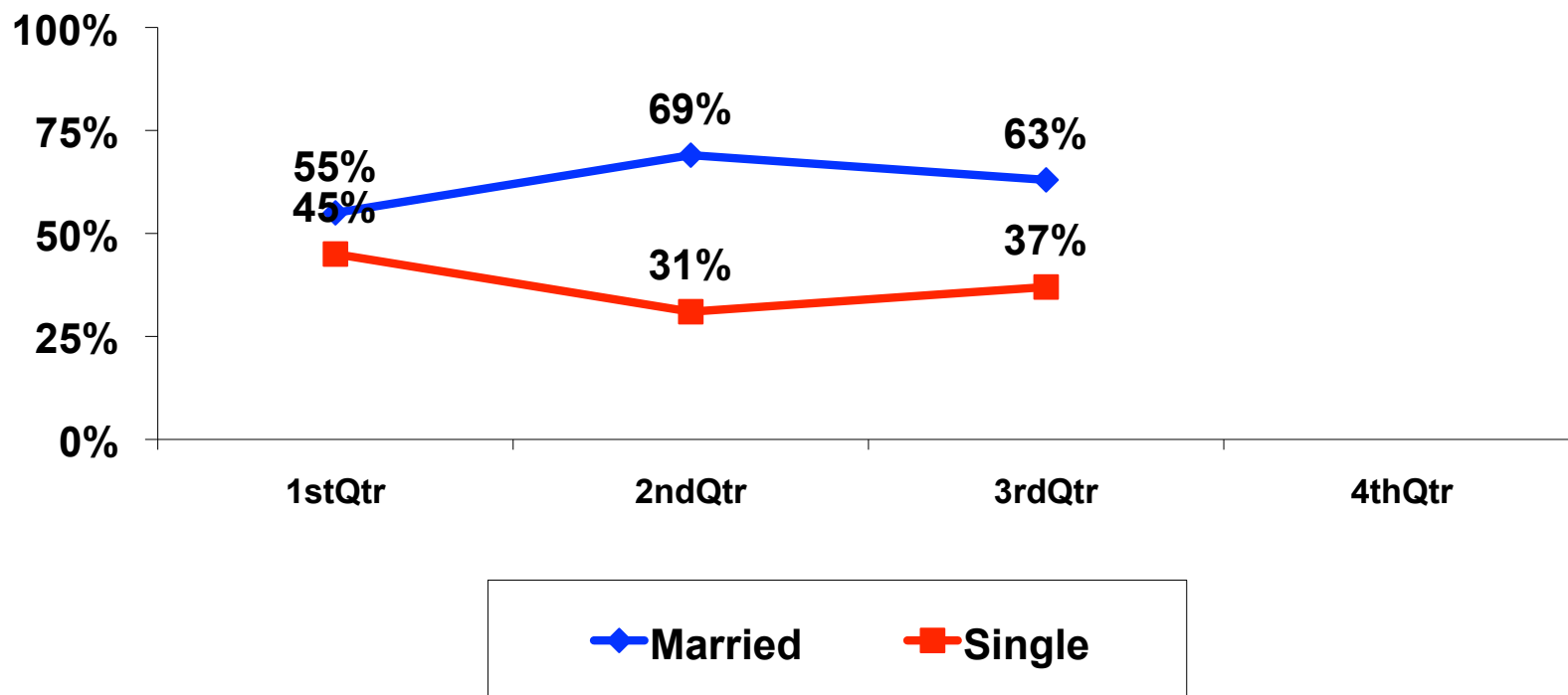
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

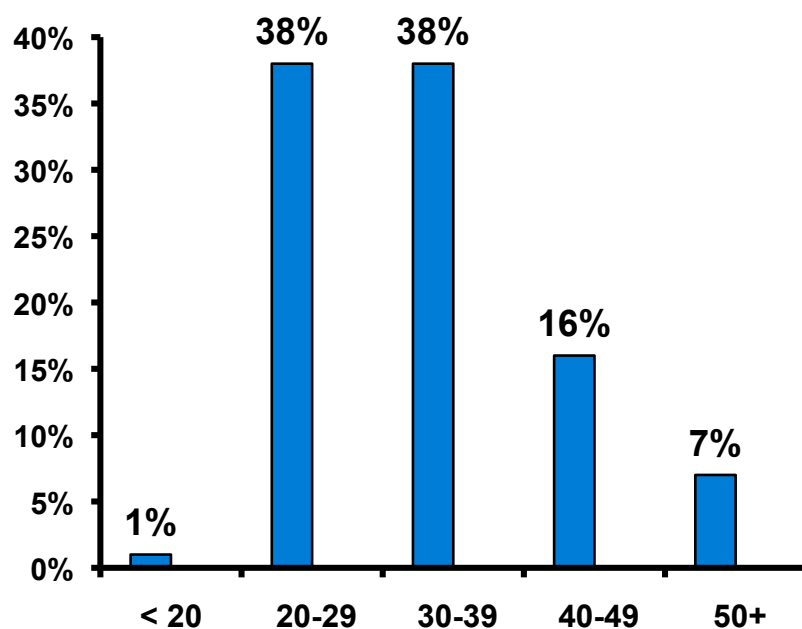


- Majority are married.

# Marital Status

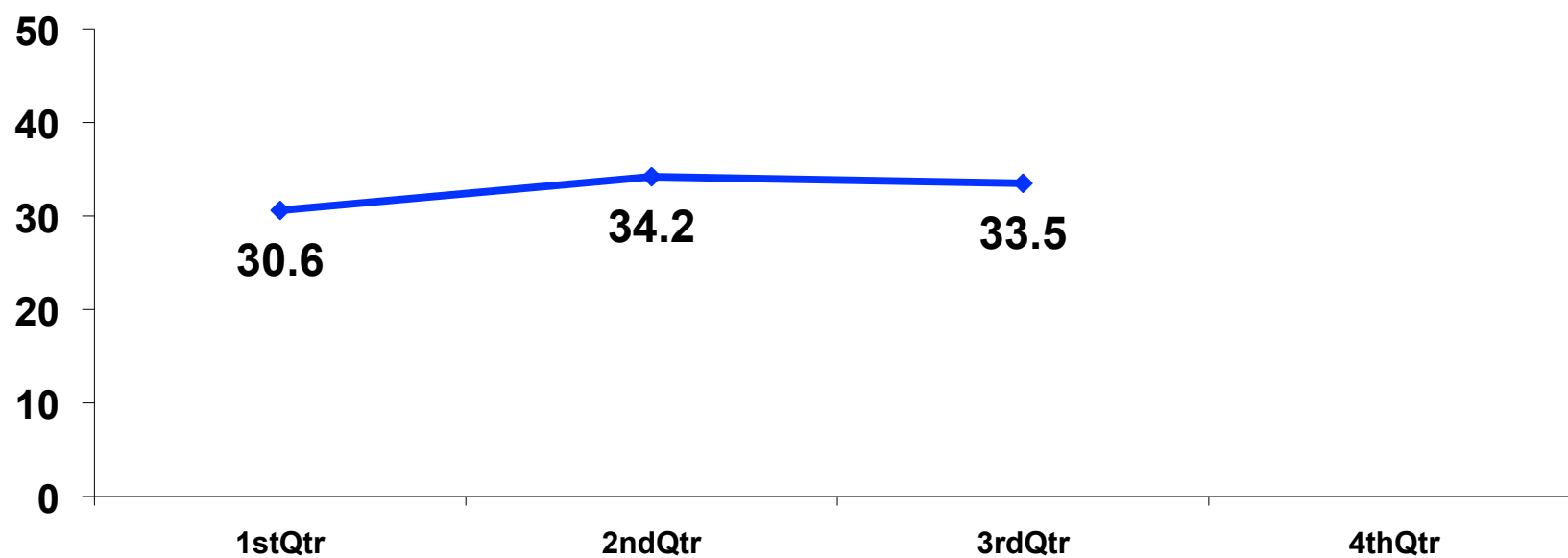


# Age - Overall

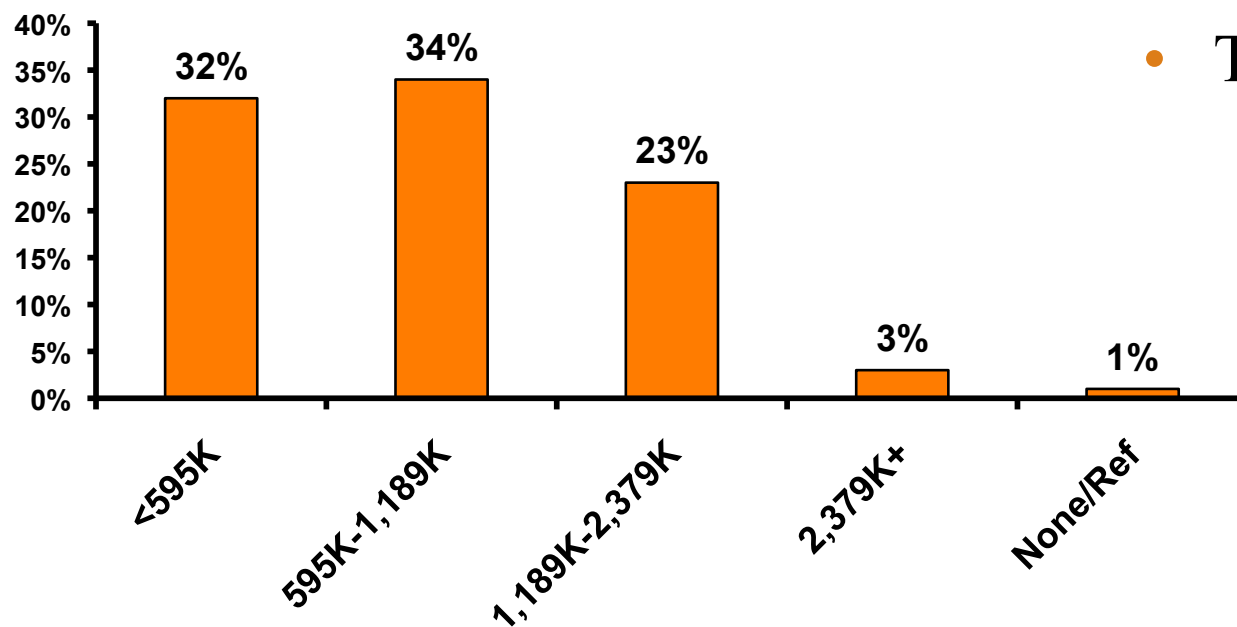


- The average age of the respondents is 33.5 years of age.

# Average Age

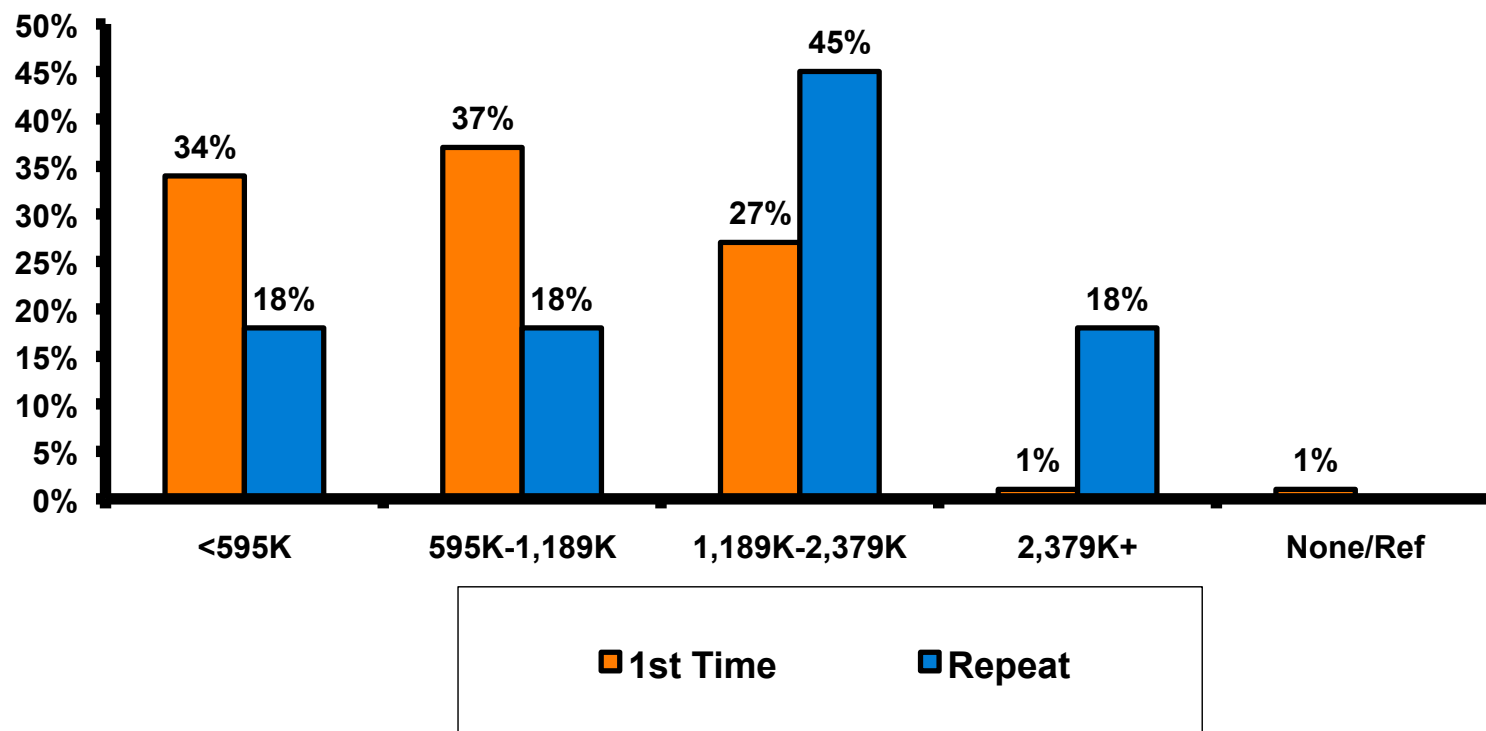


# Personal Income



• TWD 29.54=\$1

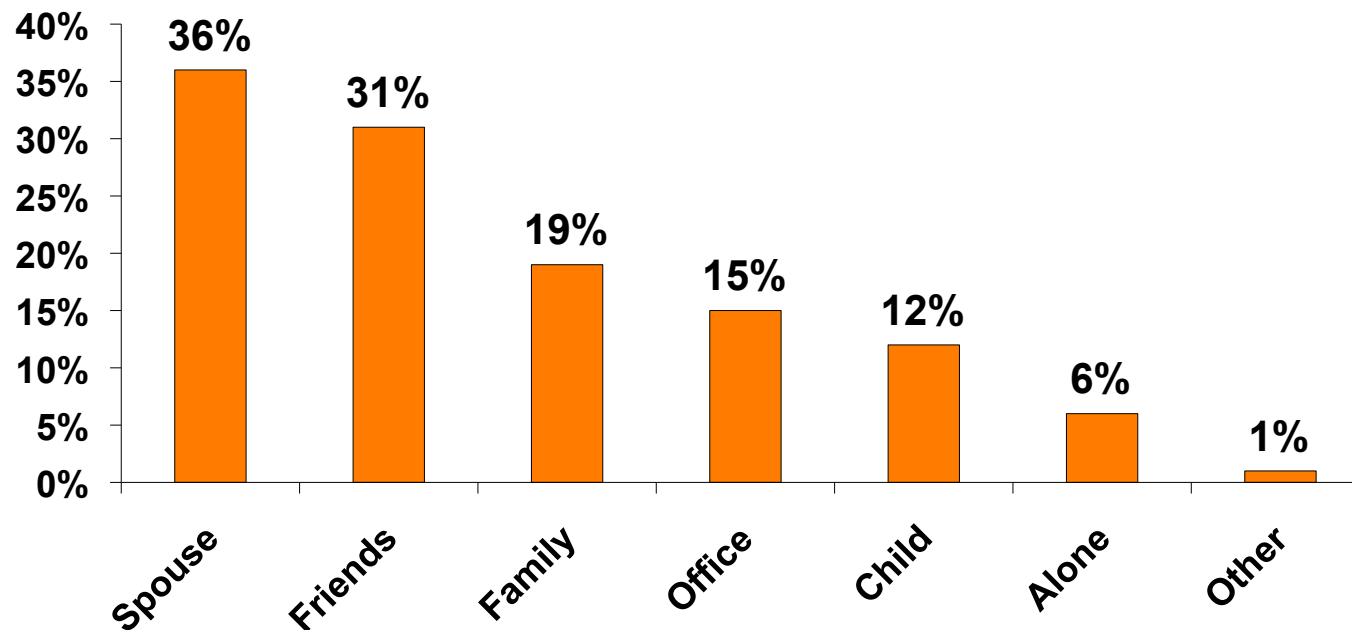
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
				Male	Female	20-29	30-39	40-49	50+
PERSONAL INCOME	<595K	Count	32	16	16	20	10		
			32%	30%	36%	51%	26%		
	595K-1,784K	Count	57	29	28	16	26	12	3
			58%	54%	62%	41%	67%	86%	75%
	1,784K-2,973K	Count	7	6	1	1	2	2	1
			7%	11%	2%	3%	5%	14%	25%
	2,973K+	Count	2	2		1	1		
			2%	4%		3%	3%		
	Refused	Count	1	1		1			
			1%	2%		3%			
Total	Count	99	54	45	39	39	14	4	

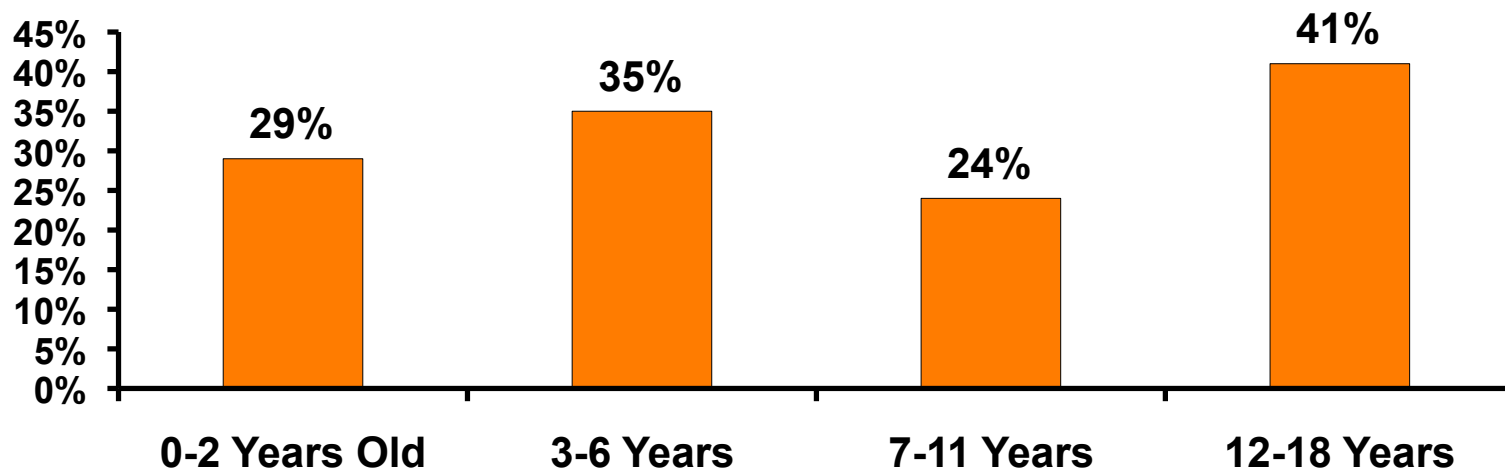
# Travel Companions



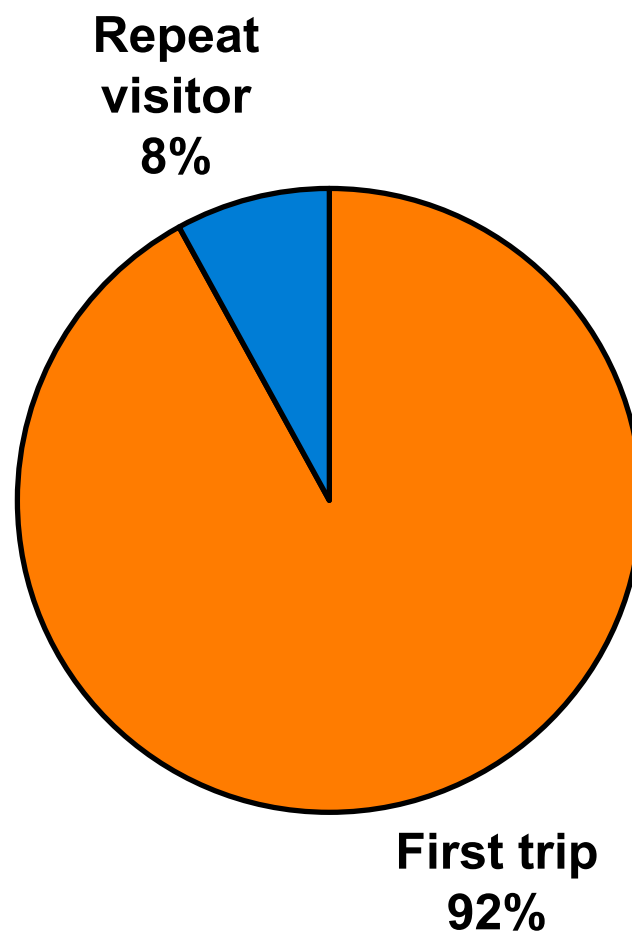
# Number of Children Travel Party

N=17 total respondents traveling with children.

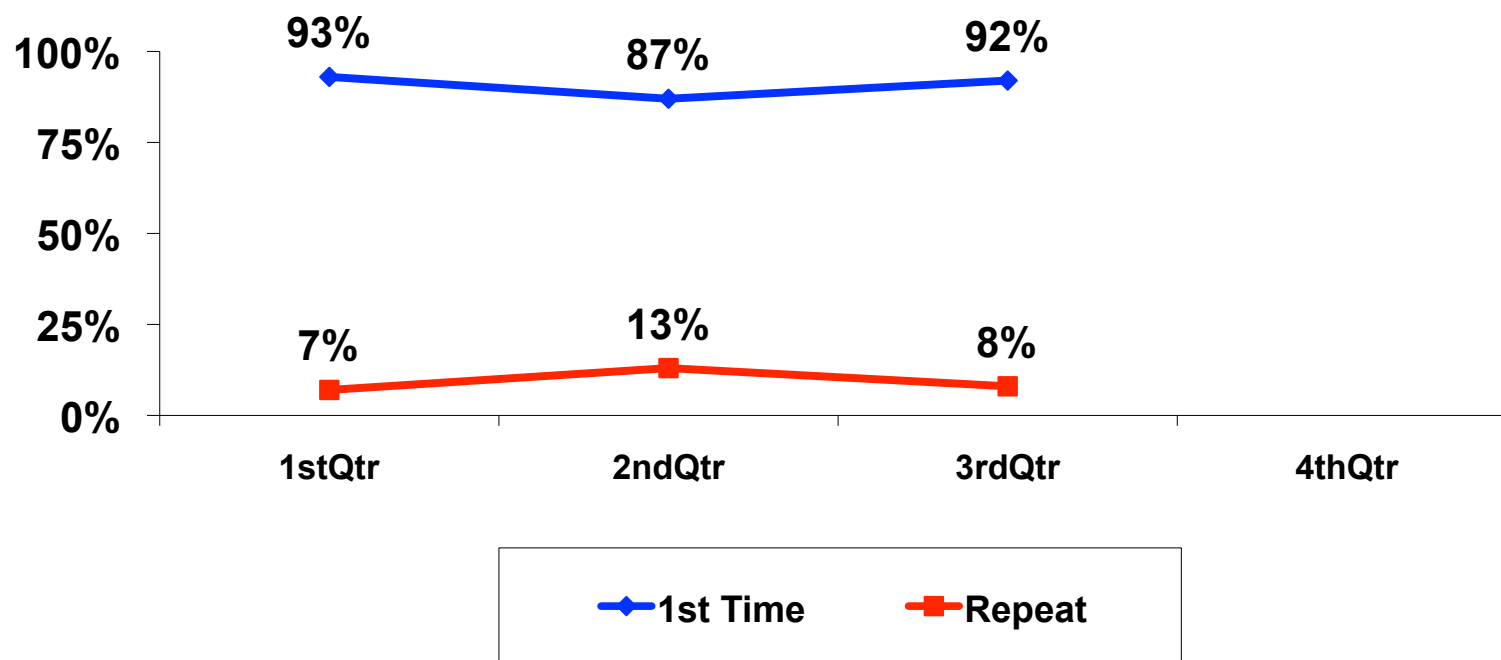
(Of those N=17 respondents, there is a total of 22 children 18 years or younger)



# Prior Trips to Guam



# Prior Trips to Guam



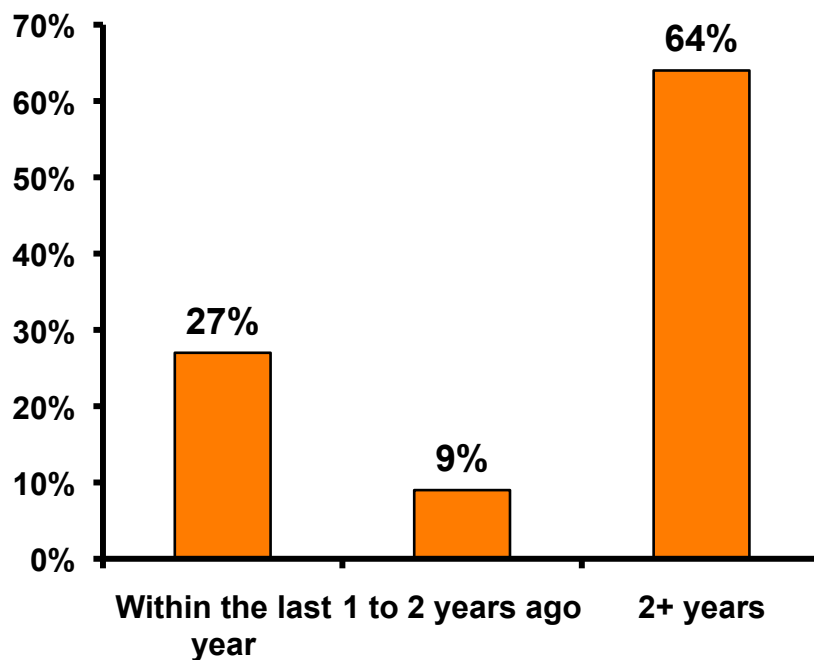
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1 st	Repeat
GENDER	Male	Count	84	77	6
			55%	55%	50%
	Female	Count	69	63	6
			45%	45%	50%
Total	Count		153	140	12
AGE	<20	Count	2	2	
			1%	1%	
	20-29	Count	56	52	4
			38%	38%	33%
	30-39	Count	57	53	4
			38%	39%	33%
	40-49	Count	24	21	2
		16%	15%	17%	
	50+	Count	10	8	2
			7%	6%	17%
Total	Count		149	136	12

- Repeat visitors tend to be slightly older.

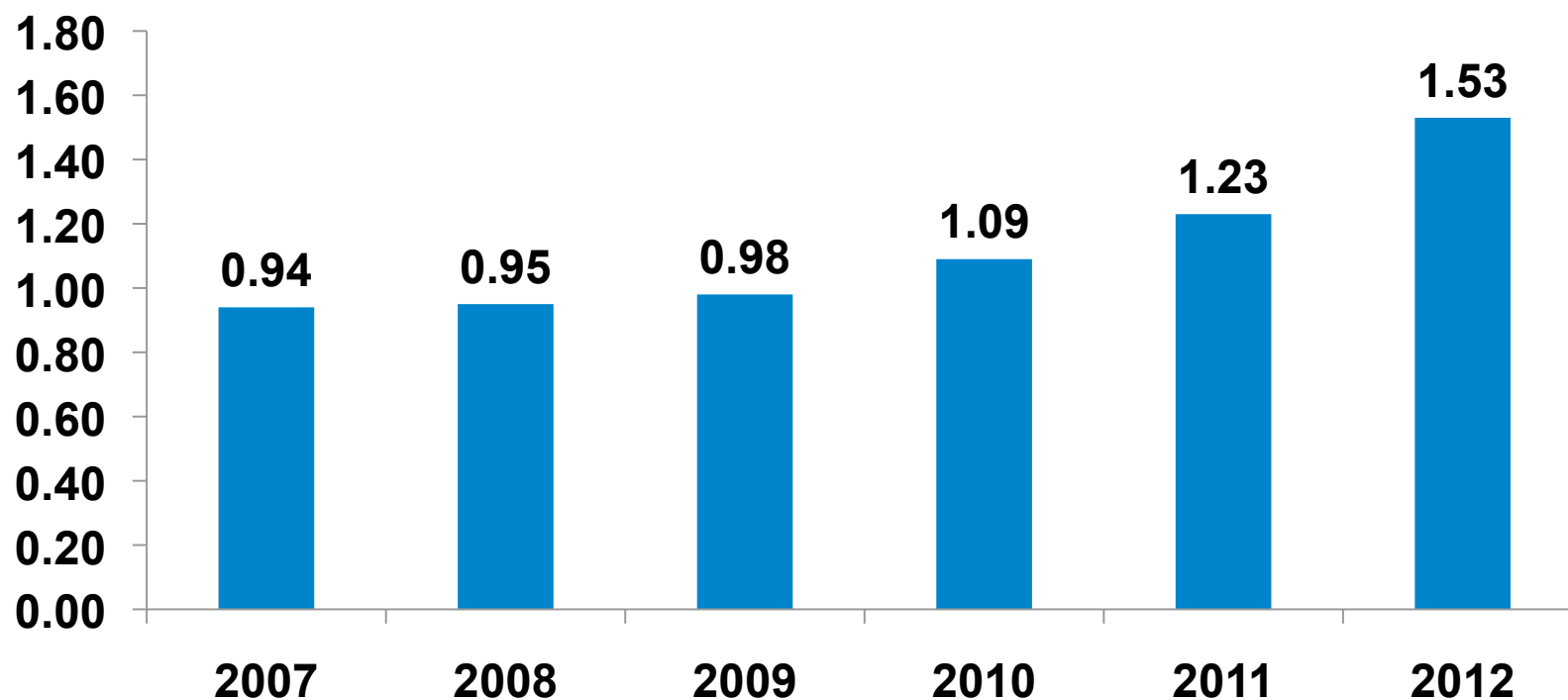
# Repeat Visitors Last Trip

n = 11



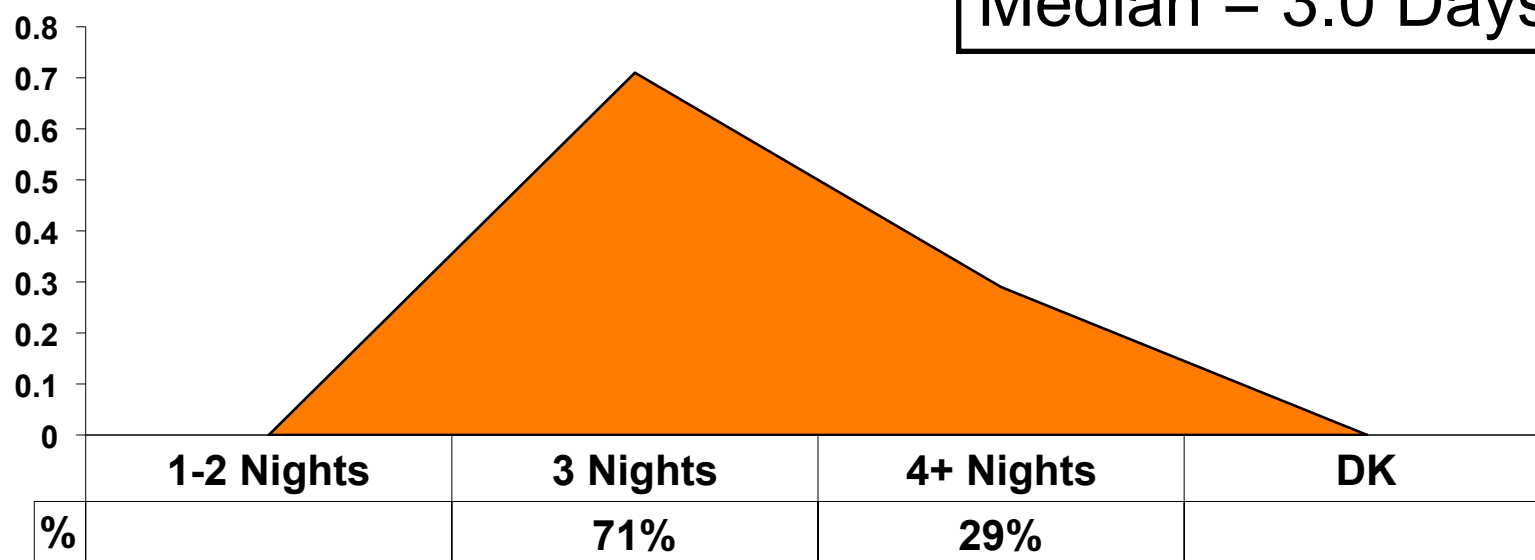
- Typical repeat visitor has been to Guam 1.5 times.

# Average Number Overnight Trips (2007-2012) (2 nights or more)

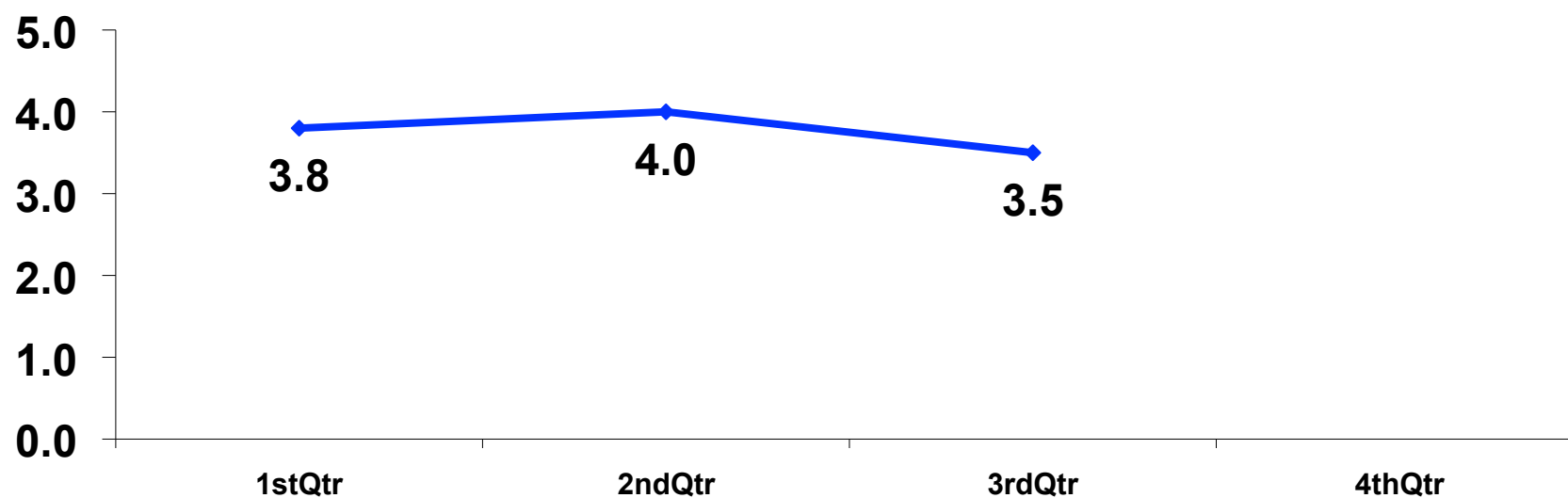


# Length of Stay

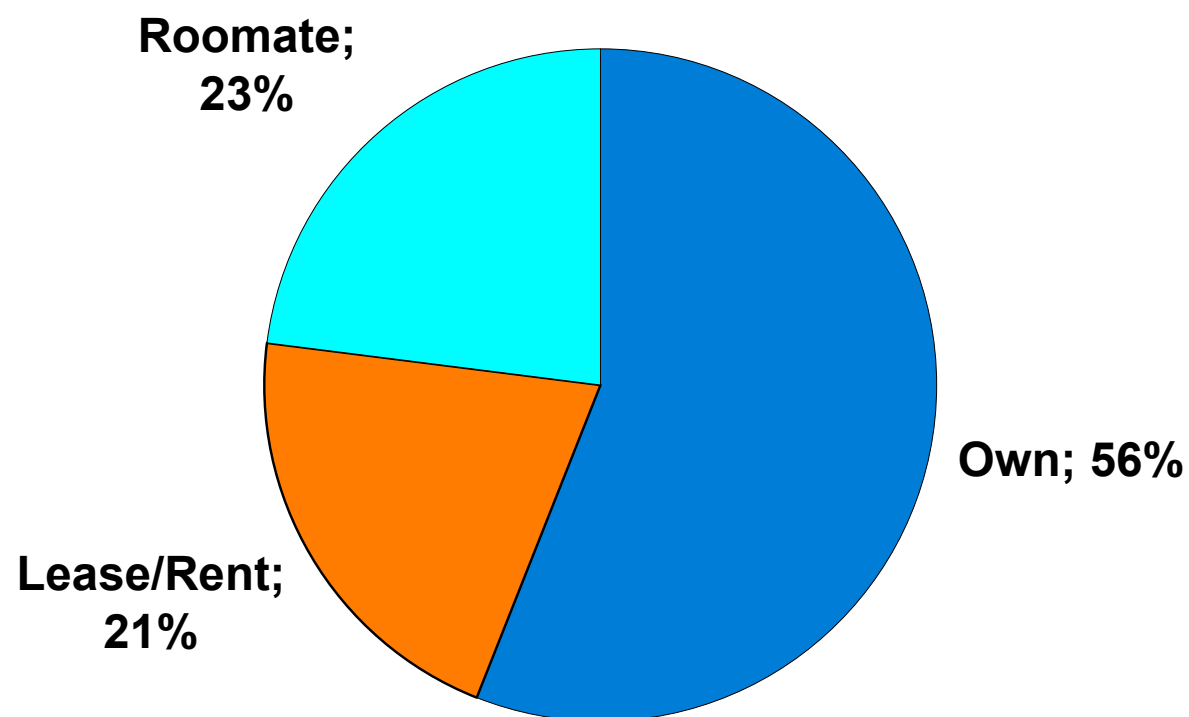
Mean = 3.50 Days  
Median = 3.0 Days



# Average Length of Stay



# Living Accommodations

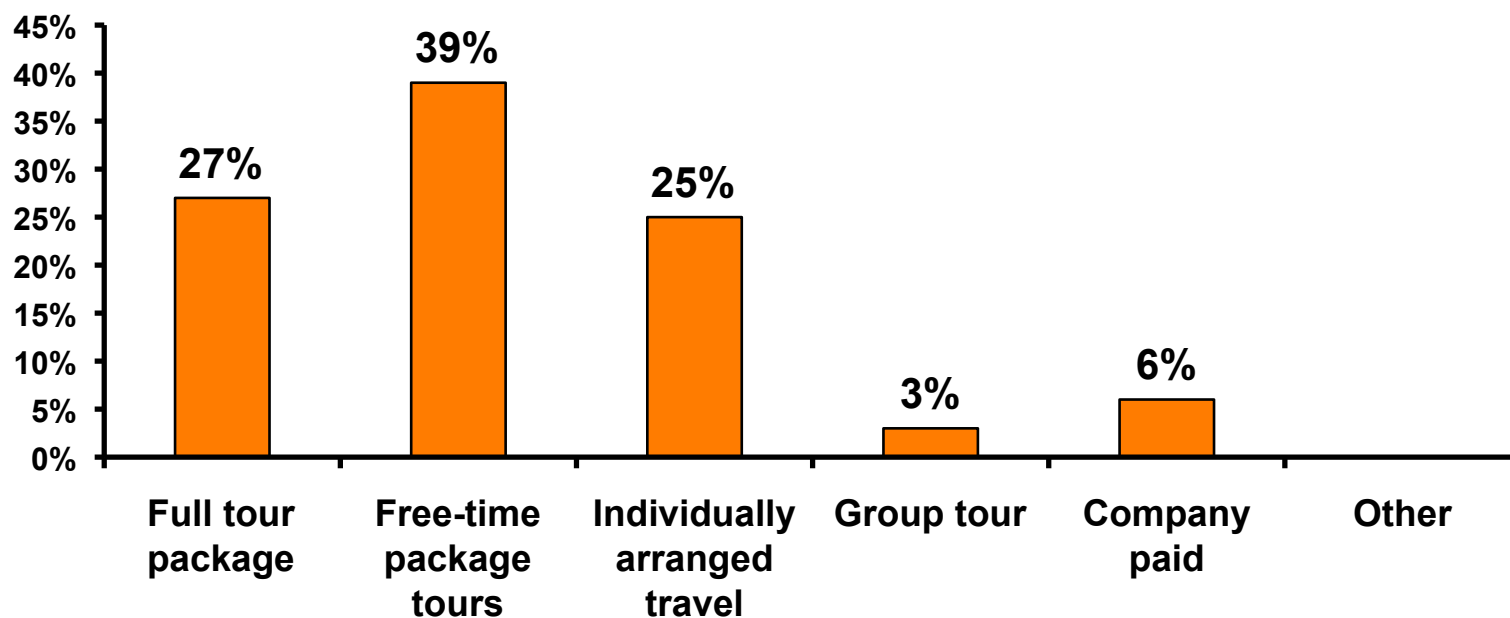


# Occupation by Income

		TOTAL	PERSONAL INCOME				
			<595K	595K-1,784K	1,784K-2,973K	2,973K+	Refused
Q.36	Own my own home	56%	34%	61%	86%		
	Live with friends or relatives and pay no rent	23%	38%	20%	14%	50%	
	Lease or rent a home or apartment	21%	28%	20%		50%	100%
Total	Count	128	32	56	7	2	1

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall

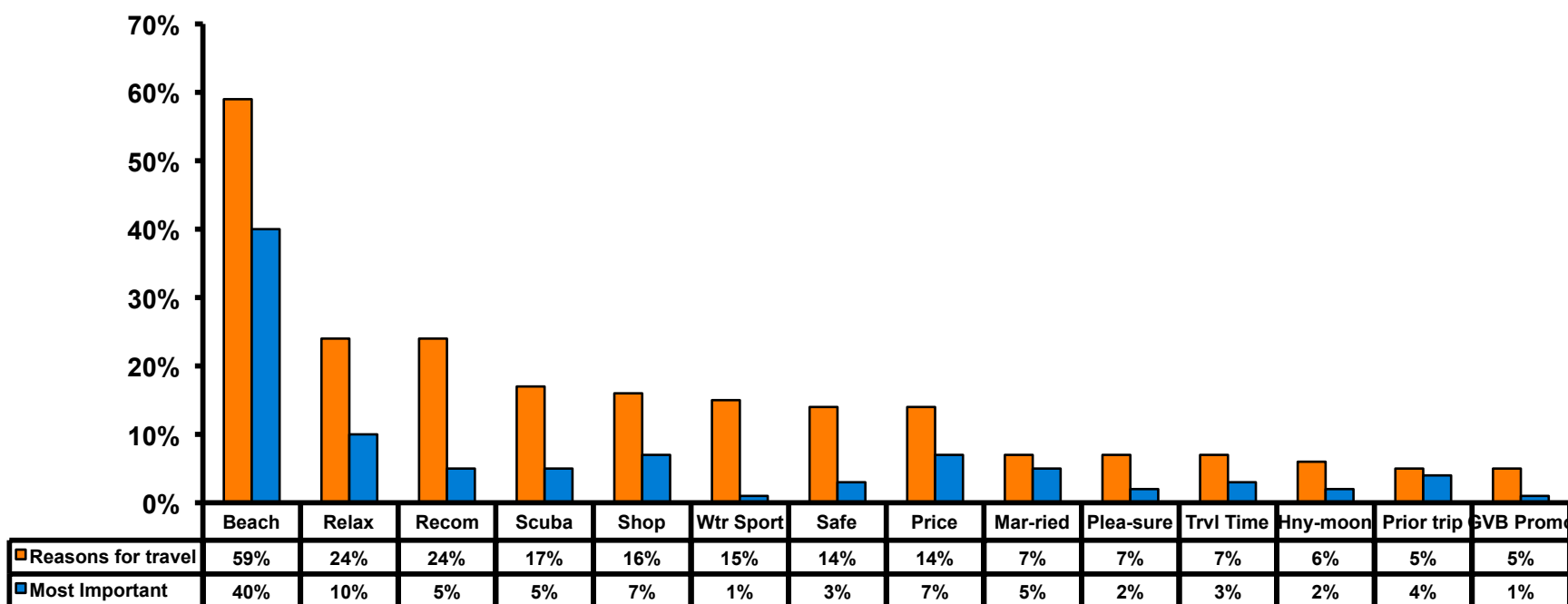


# Accommodation by Income

Average length of stay: 3.50 days

		TOTAL	PERSONAL INCOME				
			<595K	595K-1,784K	1,784K-2,973K	2,973K+	Refused
Q.9	Fiesta Resort Guam	18%	28%	18%	14%	50%	100%
	Pacific Islands Club PIC	12%		18%	29%		
	Sheraton Laguna Resort	13%		16%			
	The Westin Resort Guam	10%	16%	9%		50%	
	Outrigger Guam Resort	8%	22%	4%			
	Royal Orchid Guam	8%	3%	5%			
	Hilton Guam Resort & Spa	6%	3%	9%			
	Holiday Resort Guam	5%	9%	4%	14%		
	Hotel Nikko Guam	5%	6%	9%			
	Hyatt Regency Guam	4%	3%	2%	29%		
	Guam Reef Hotel	3%	6%	4%			
	Bayview Hotel	3%		2%	14%		
	Relatives, Friends, Home Stay	1%		2%			
	Hotel Sane Fe	1%		2%			
	Guam Marriott Resort Hotel	1%					
	Grand Plaza Hotel	1%					
	Ramada Suites Guam	1%	3%				
Total	Count	154	32	57	7	2	1

# Travel Motivation - Top Responses



# Most Important Reason for Choosing Guam

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

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	59%	100%	59%	61%	54%	40%	57%	62%
	Just to relax	24%	50%	29%	20%	21%	30%	20%	29%
	Recommendation of friend, relative, travel agency	24%	50%	30%	20%	17%	20%	21%	26%
	SCUBA diving	17%	50%	16%	16%	17%	20%	14%	21%
	Shopping	16%		23%	14%	8%		17%	15%
	Water sports	15%	50%	18%	14%	13%		13%	18%
	It is a safe place to spend a vacation	14%	50%	16%	14%	4%	30%	13%	16%
	Price of the tour package	14%		14%	13%	17%	10%	14%	13%
	To get married or Attend wedding	7%	50%	7%	7%	4%	10%	6%	7%
	Pleasure	7%	50%	13%	2%	4%		5%	9%
	Short travel time	7%		7%	7%	4%		5%	9%
	Honeymoon	6%		9%	7%			5%	7%
	A previous visit	5%		7%	2%	4%	20%	4%	7%
	Promotional materials from GVB	5%		13%		4%		7%	3%
	To golf	4%			5%	8%	10%	5%	3%
	To visit friends or relatives	3%			4%	8%		2%	3%
	Other	3%			5%	4%		2%	3%
	Company or Business trip	1%		2%	2%			1%	1%
	Special promotion	1%				4%		1%	
Total	Cases	153	2	56	56	24	10	84	68

# Motivation by Income

		TOTAL	PERSONAL INCOME				
			<595K	595K-1,784K	1,784K-2,973K	2,973K+	Refused
Q.5	Beautiful seas, beaches, tropical climate	59%	88%	58%	29%	50%	100%
	Recommendation of friend, relative, travel agency	24%	53%	19%	29%		
	Just to relax	24%	34%	25%	14%		
	SCUBA diving	17%	31%	14%			
	Water sports	15%	28%	16%	14%		100%
	Shopping	16%	16%	16%	29%		100%
	It is a safe place to spend a vacation	14%	13%	21%			
	Price of the tour package	14%	19%	16%	14%		
	Honeymoon	6%	6%	11%	14%		
	Pleasure	7%	13%	7%			
	Short travel time	7%	3%	7%	14%	50%	
	To get married or Attend wedding	7%	3%	7%	14%		
	A previous visit	5%	3%	9%	14%	50%	
	Promotional materials from GVB	5%	9%	2%	14%		100%
	To golf	4%		5%			
	Other	3%	6%	4%			
	To visit friends or relatives	3%		4%		50%	
	Company or Business trip	1%				50%	
	Special promotion	1%			14%		
Total	Cases	153	32	57	7	2	1

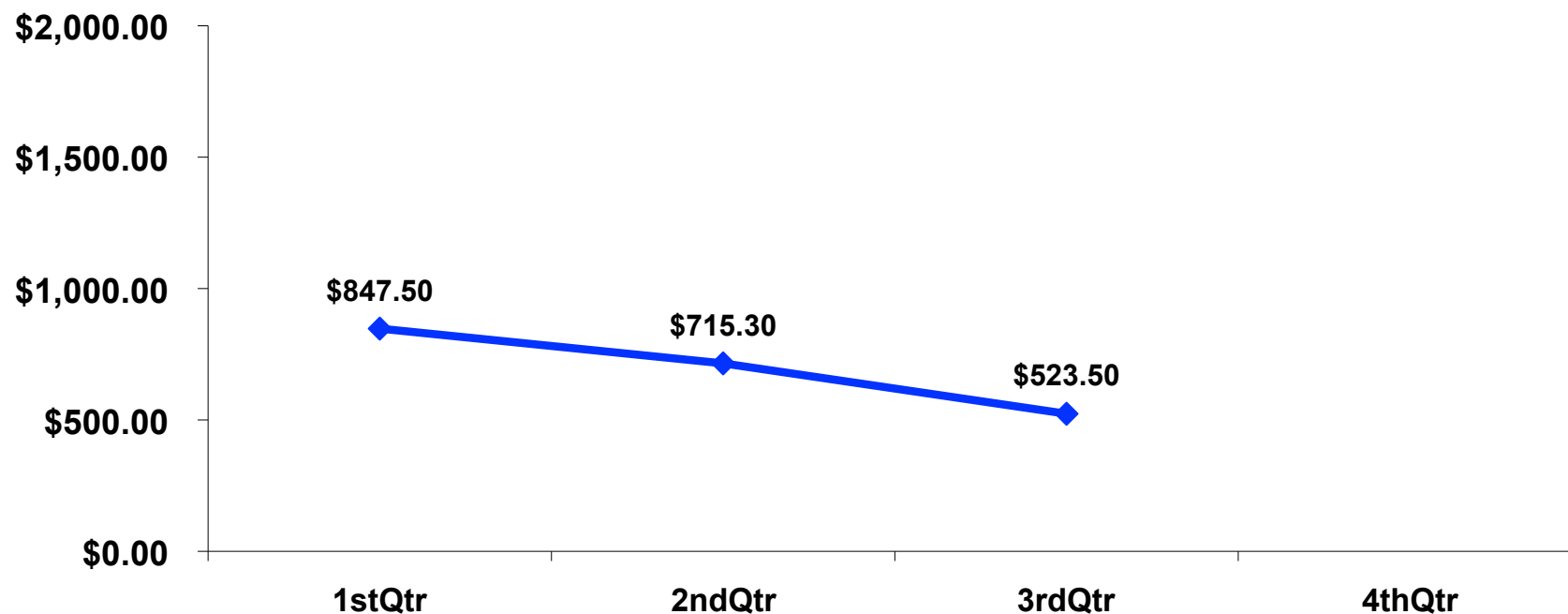
# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures

TWD 29.54/US\$1

- \$839.00 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$5,416 = maximum (highest amount recorded for the entire sample)
- \$523.50 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person



YTD=\$695.40

# Breakdown of Prepaid Expenditures

## TWD 29.54=\$1

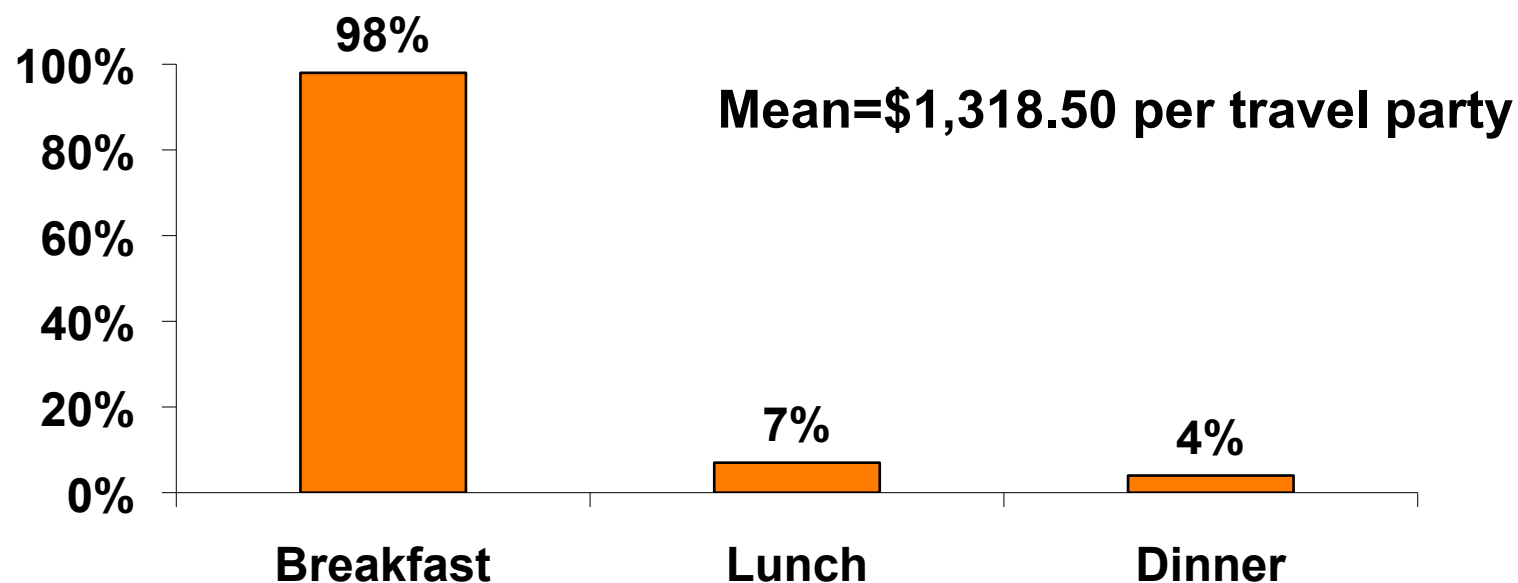
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$921.40
Air & Accommodation w/ daily meal package	\$1,318.50
Air only	\$1,194.10
Accommodation only	\$3,385.20
Accommodation w/ daily meal only	\$5,416.40
Food & Beverages in Hotel	\$-
Ground transportation - China	\$38.00
Ground transportation - Guam	\$56.10
Optional tours/ activities	\$327.00
Other expenses	\$495.80
Total Prepaid	\$839.00

# Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

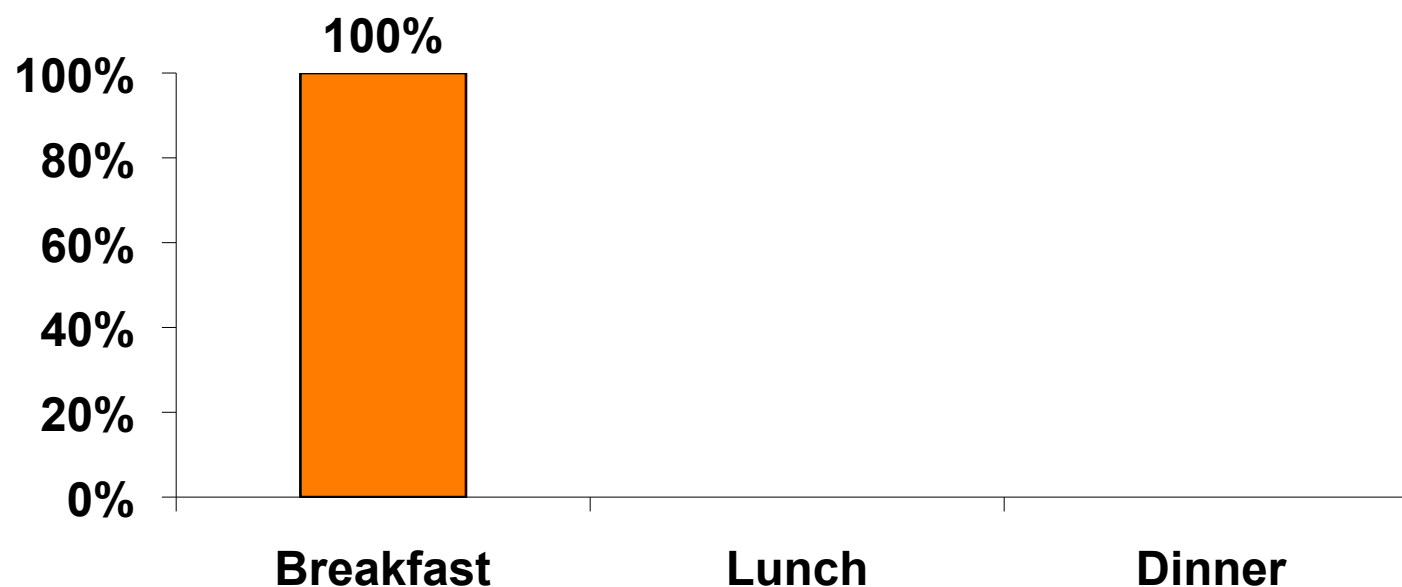
n=46



# Prepaid Meal Breakdown

Accommodations with Daily Meal Package

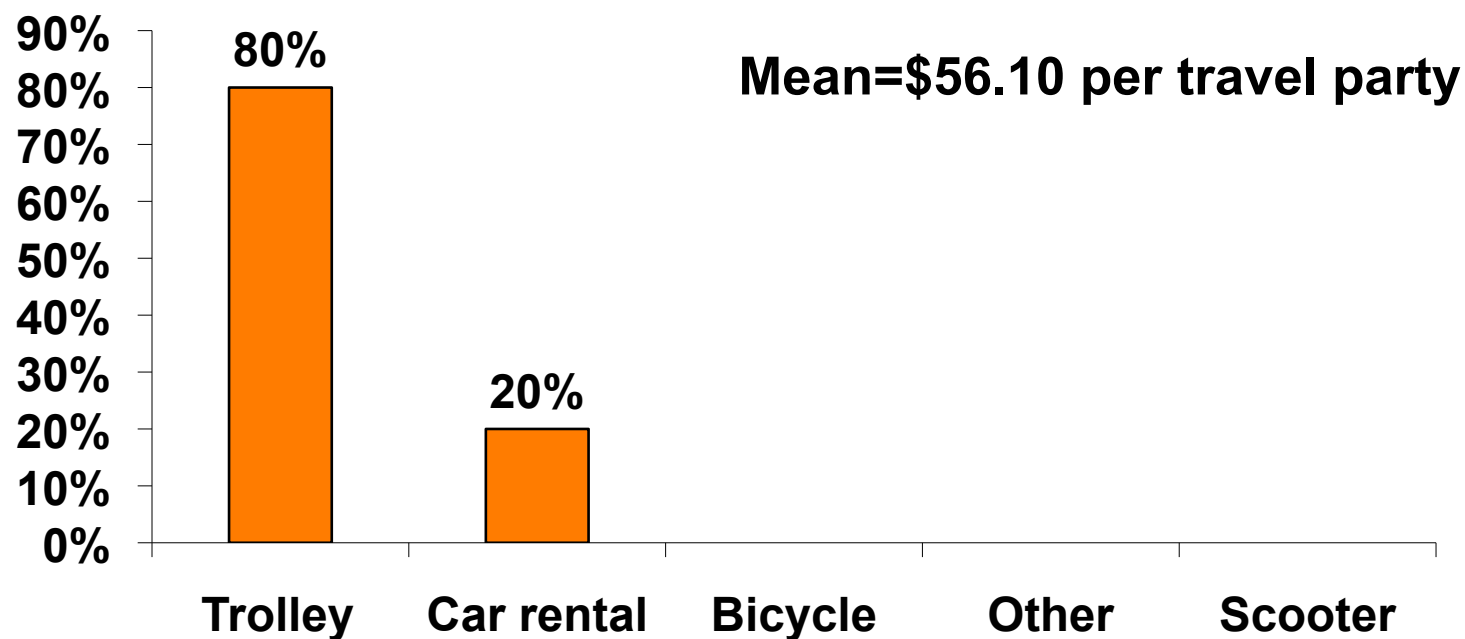
n= 1



Mean= \$5,416.40 per travel party

# Prepaid Ground Transportation

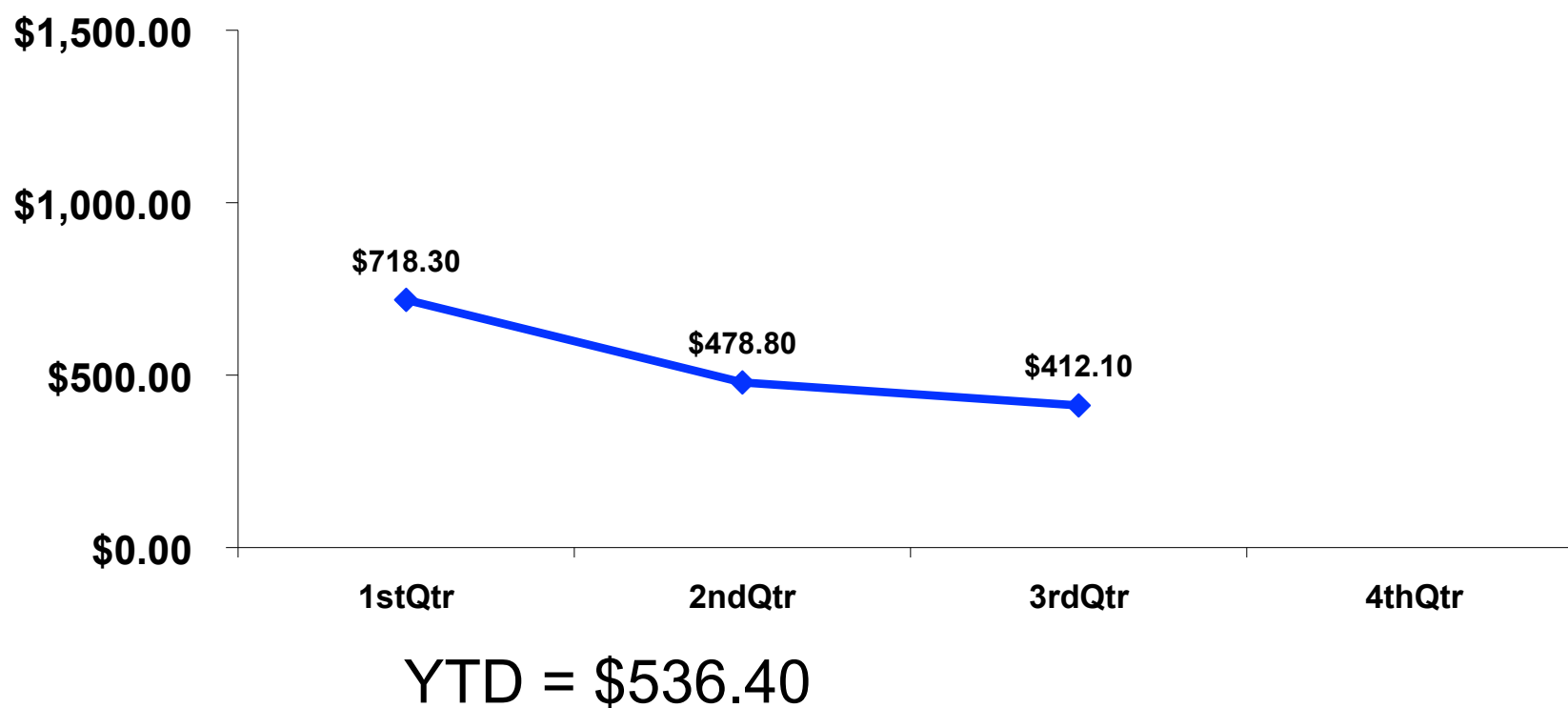
n=5



# On-Island Expenditures

- \$638.40 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,000 = Maximum (highest amount recorded for the entire sample)
- \$412.10 = overall mean average per person on-island expenditure

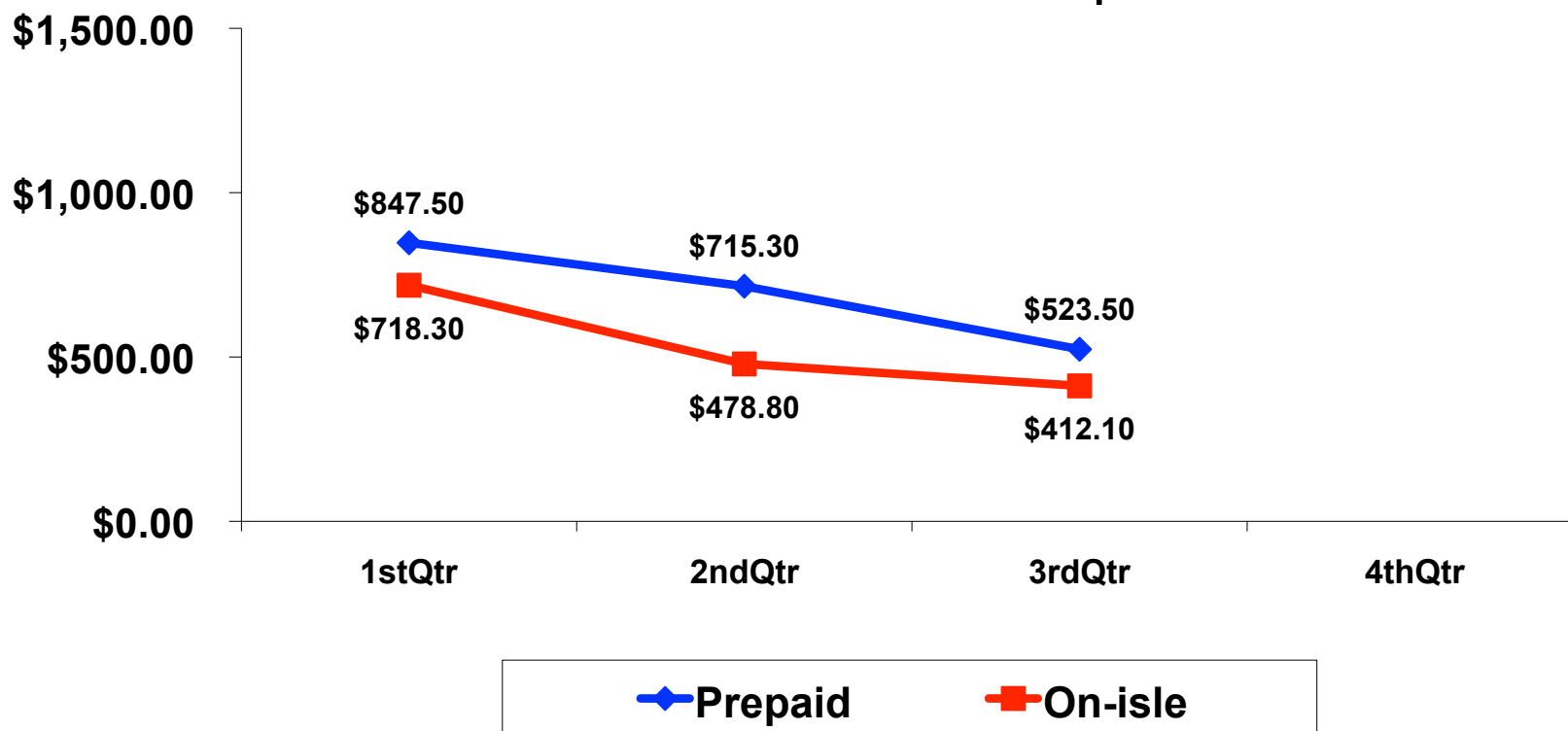
# On-Island Expenditures Per Person



# Prepaid/ On-Island Expenditures Per Person

On-Island YTD = \$536.40

Prepaid YTD=\$695.40

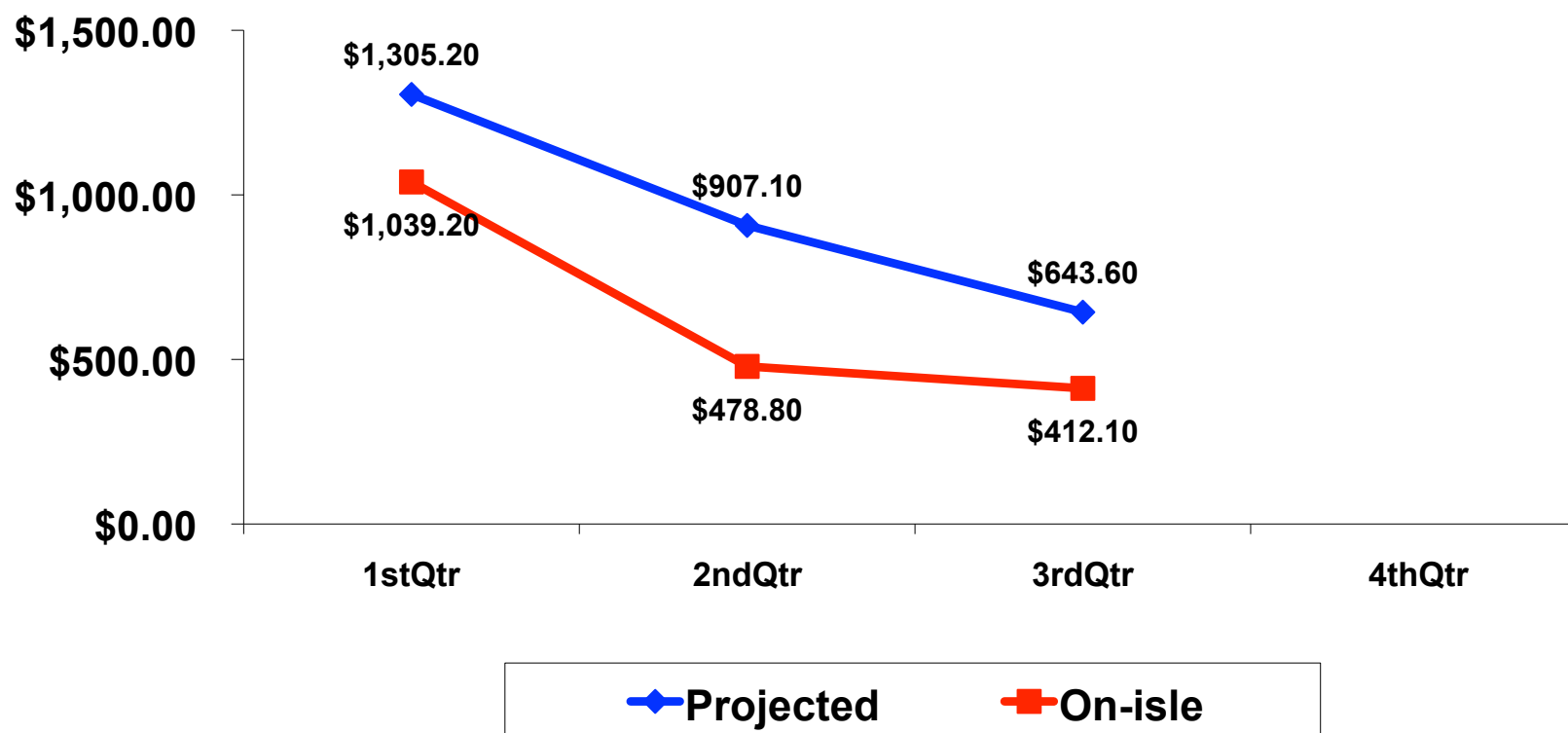


# Projected On-Island Expenditures

- \$643.60 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,000 = Maximum (highest amount recorded for the entire sample)

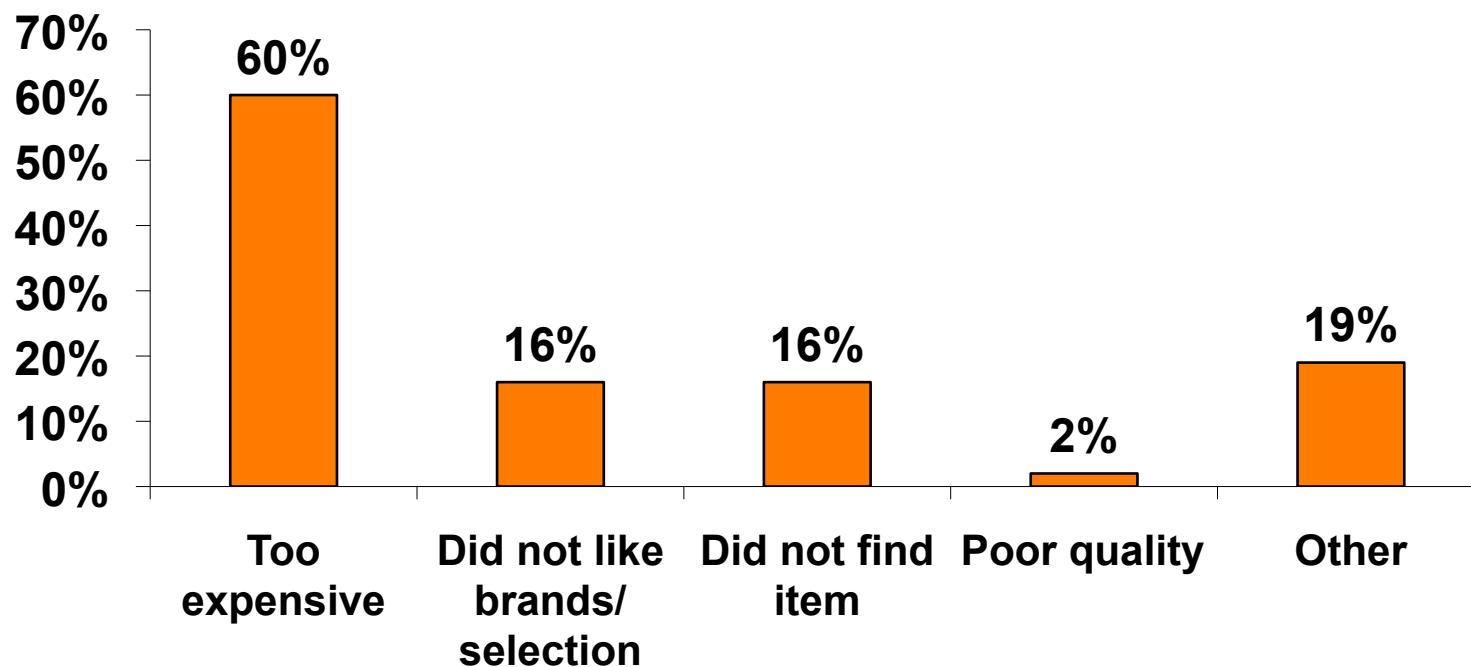
# Projected On-Isle Expenditures

## Actual vs. Projected



# Reasons for Spending Less

n=58



# Total On-Island Expenditure by Gender & Age

		GENDER			GENDER									
		GENDER		TOTAL	Male					Female				
					AGE					AGE				
					<20	20-29	30-39	40-49	50+	<20	20-29	30-39	40-49	50+
Q.11A	Mean	\$638.42	\$673.75	\$604.65	\$100.00	\$817.84	\$700.73	\$599.85	\$353.67	\$80.00	\$460.28	\$650.22	\$995.00	\$333.33
	Median	\$394	\$401	\$334	\$100	\$402	\$508	\$499	\$0	\$80	\$300	\$332	\$1,000	\$0

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$36.76	\$36.56	\$37.54	\$0.00	\$10.54	\$54.26	\$76.17	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$25.12	\$34.51	\$14.04	\$40.00	\$16.96	\$39.42	\$17.50	\$11.10
	Median	\$0	\$0	\$0	\$40	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$28.89	\$34.23	\$22.80	\$0.00	\$19.13	\$41.68	\$39.25	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$89.09	\$79.96	\$101.49	\$0.00	\$69.77	\$106.64	\$144.96	\$25.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$15	\$0
GIFT/ SOUV-SELF	Mean	\$94.79	\$62.85	\$135.04	\$1.50	\$107.59	\$108.37	\$99.67	\$0.00
	Median	\$0	\$0	\$0	\$2	\$0	\$0	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$72.24	\$57.38	\$91.38	\$8.50	\$44.18	\$57.79	\$172.50	\$100.00
	Median	\$0	\$0	\$0	\$9	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$6.55	\$6.02	\$7.28	\$0.00	\$7.18	\$8.14	\$5.92	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$287.82	\$363.71	\$199.43	\$40.00	\$378.59	\$265.16	\$239.13	\$175.60
	Median	\$0	\$0	\$0	\$40	\$0	\$0	\$100	\$0
TOTAL ON ISLAND	Mean	\$638.42	\$673.75	\$604.65	\$90.00	\$658.21	\$676.81	\$780.96	\$312.20
	Median	\$394	\$401	\$334	\$90	\$379	\$450	\$900	\$0

# On-Island Expenditures

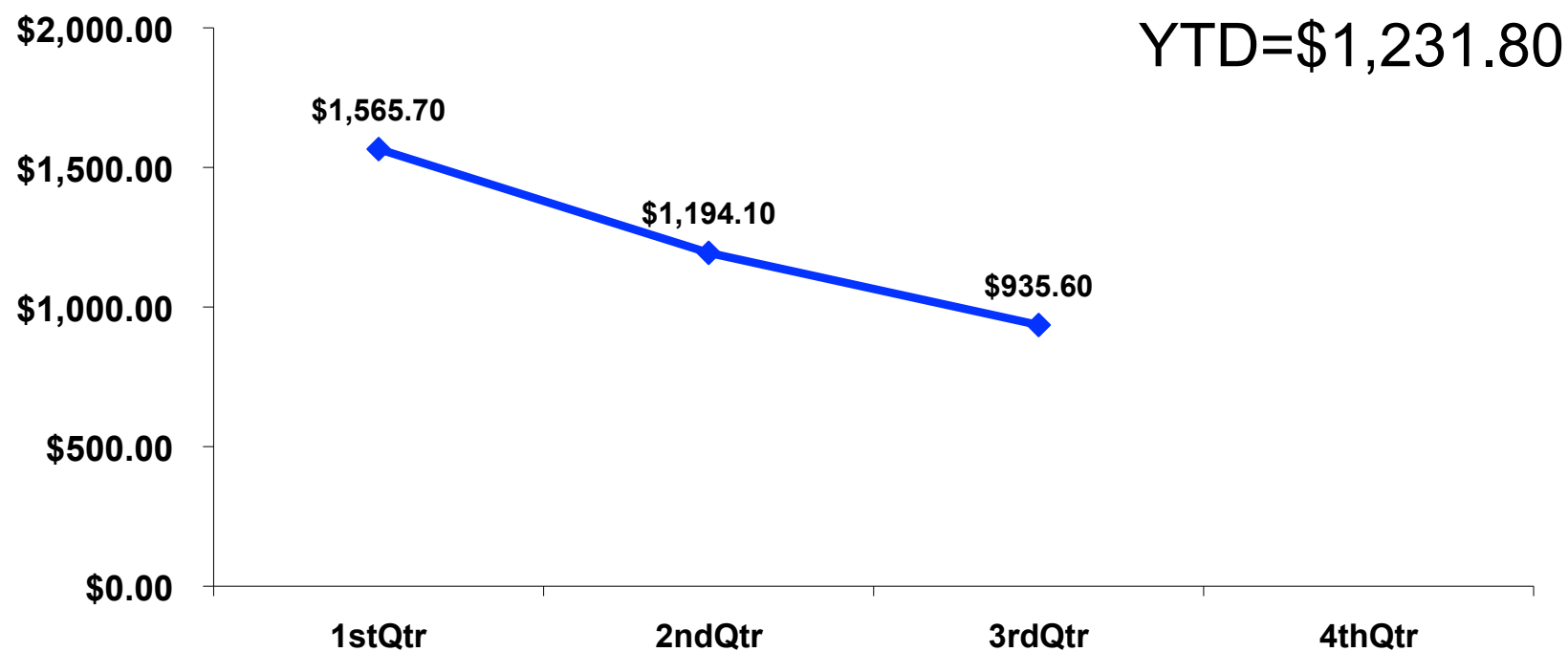
## First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$30.77	\$86.92
	Median	\$0	\$0
F&B-FF	Mean	\$18.74	\$102.17
REST/CONV	Median	\$0	\$35
F&B-OUT- SIDE	Mean	\$22.90	\$101.67
HOTEL/ REST	Median	\$0	\$35
OPTIONAL	Mean	\$90.32	\$48.75
TOUR	Median	\$0	\$0
GIFT/	Mean	\$87.80	\$184.75
SOUV-SELF	Median	\$0	\$50
GIFT/ SOUV-	Mean	\$75.74	\$37.08
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$5.77	\$16.25
	Median	\$0	\$1
OTHER EXP	Mean	\$303.22	\$125.08
	Median	\$0	\$0
TOTAL ON	Mean	\$633.36	\$686.00
ISLAND	Median	\$374	\$912

# **Total Expenditures Per Person (Prepaid & On-Island)**

- \$935.60 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,731 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures

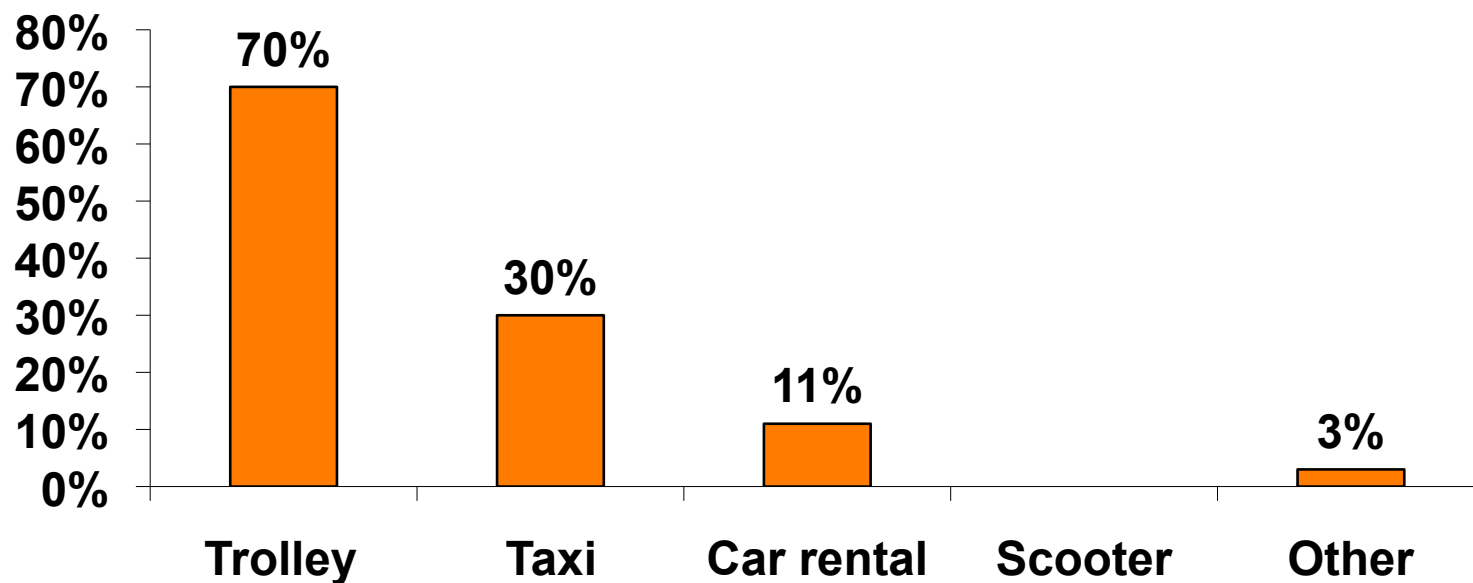


# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$36.80
Food & beverage in fast food restaurant/ convenience store	\$25.10
Food & beverage at restaurants or drinking establishments outside a hotel	\$28.90
Optional tours and activities	\$89.10
Gifts/ souvenirs for yourself/companions	\$94.80
Gifts/ souvenirs for friends/family at home	\$72.20
Local transportation	\$6.50
Other expenses not covered	\$287.80
<b>Average Total</b>	<b>\$638.40</b>

# Local Transportation

n=37



Mean=\$6.50 per travel party

# Guam Airport Expenditures

- \$30.10 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$750 = Maximum (highest amount recorded for the entire sample)

# Breakdown of Airport Expenditures

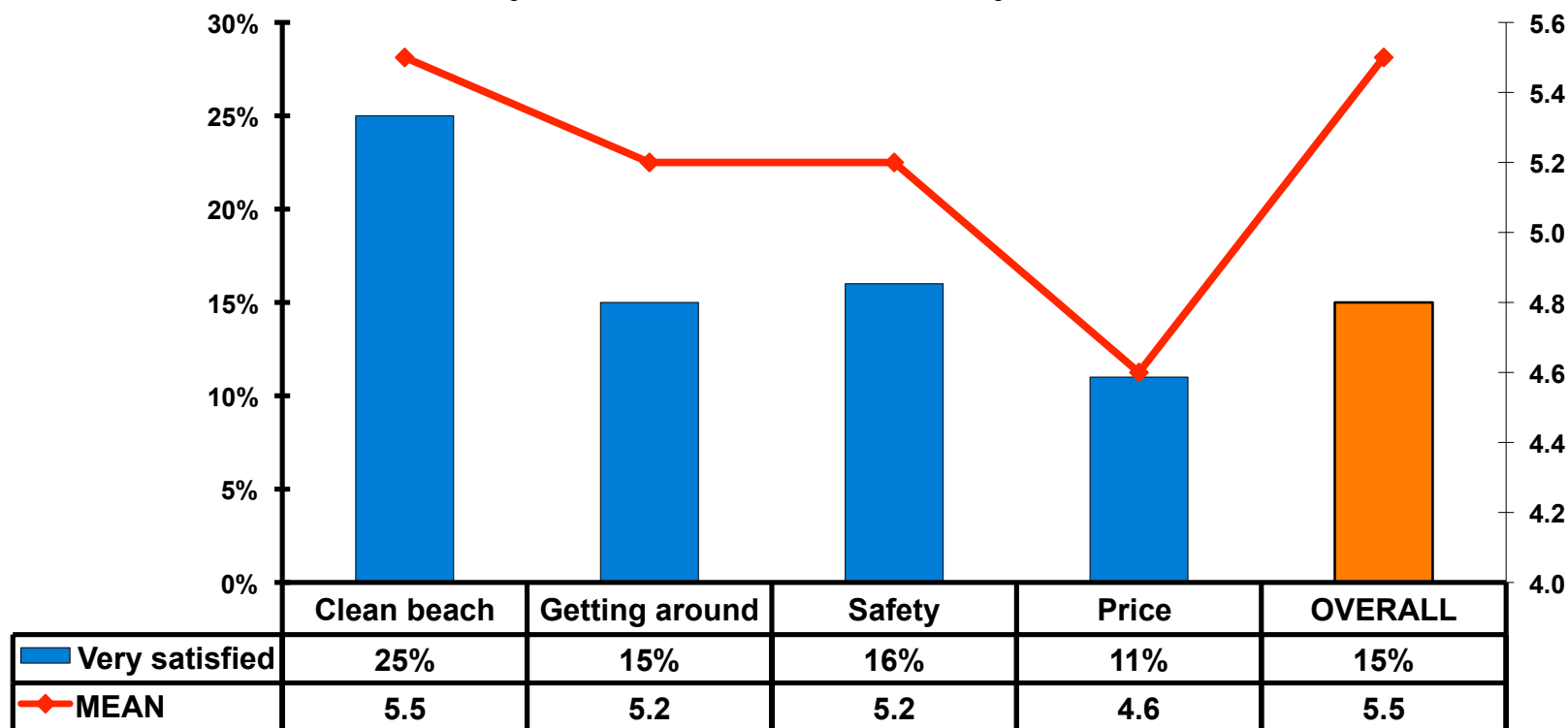
	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	\$5.30
<b>Gifts/Souvenirs Self</b>	\$12.40
<b>Gifts/Souvenirs Others</b>	\$12.40
<b>Total</b>	<b>\$30.10</b>

# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

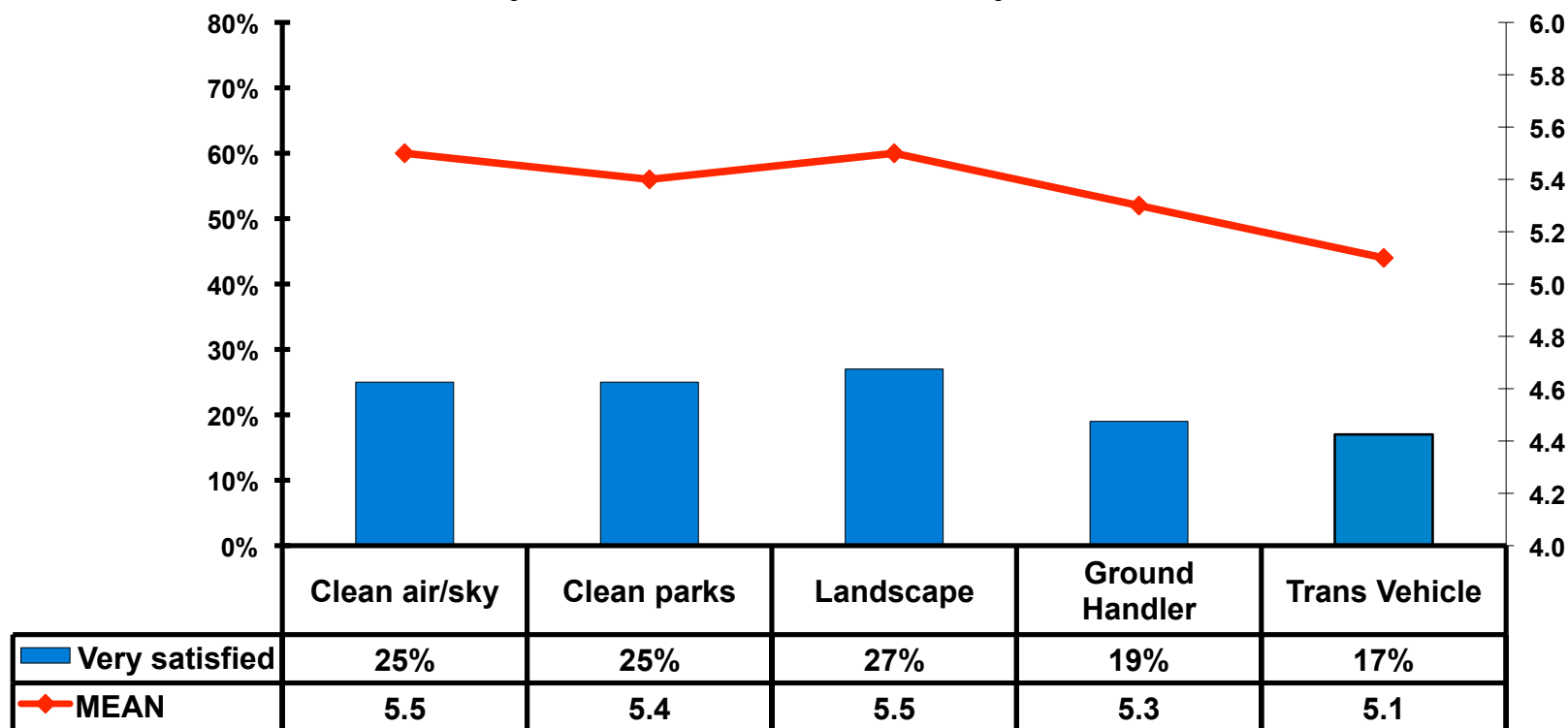
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Scores Overall

7pt Rating Scale

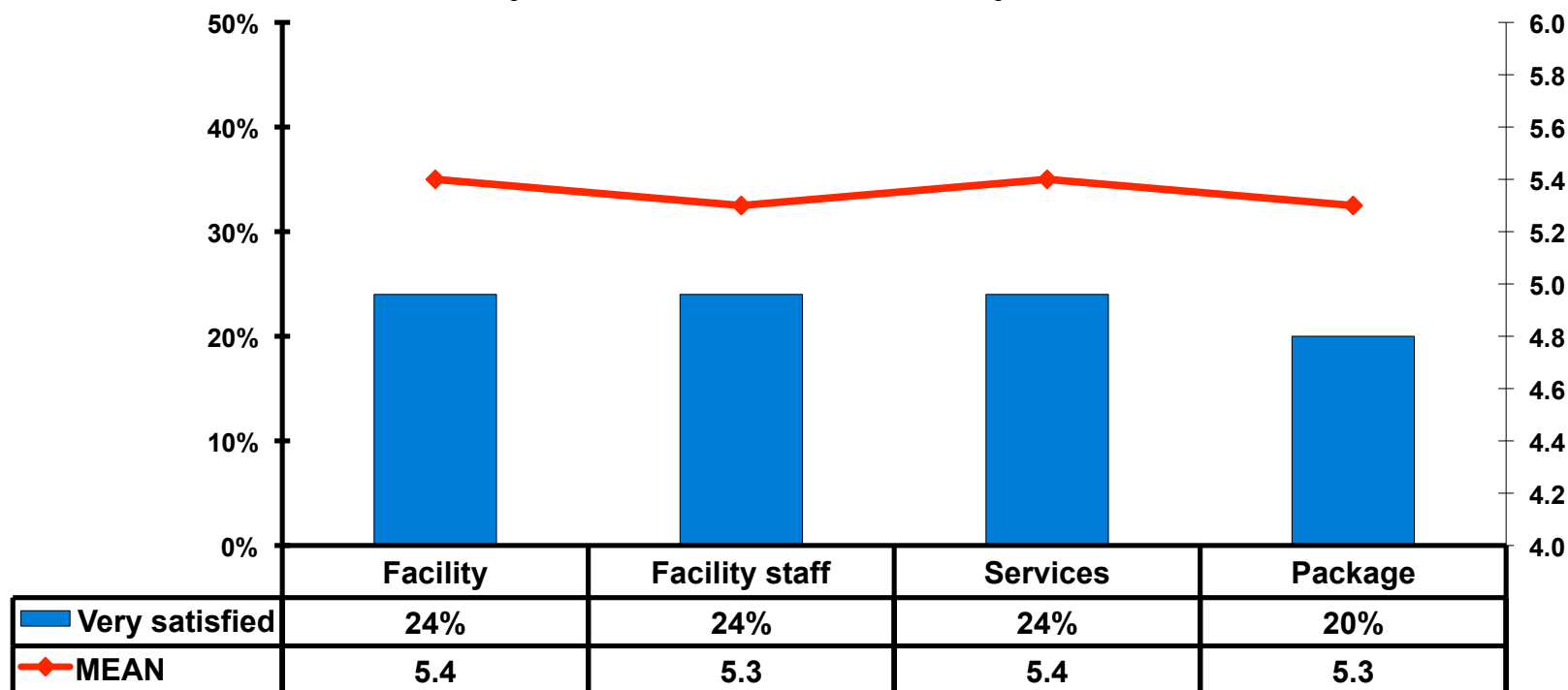
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Scores Wedding

7pt Rating Scale

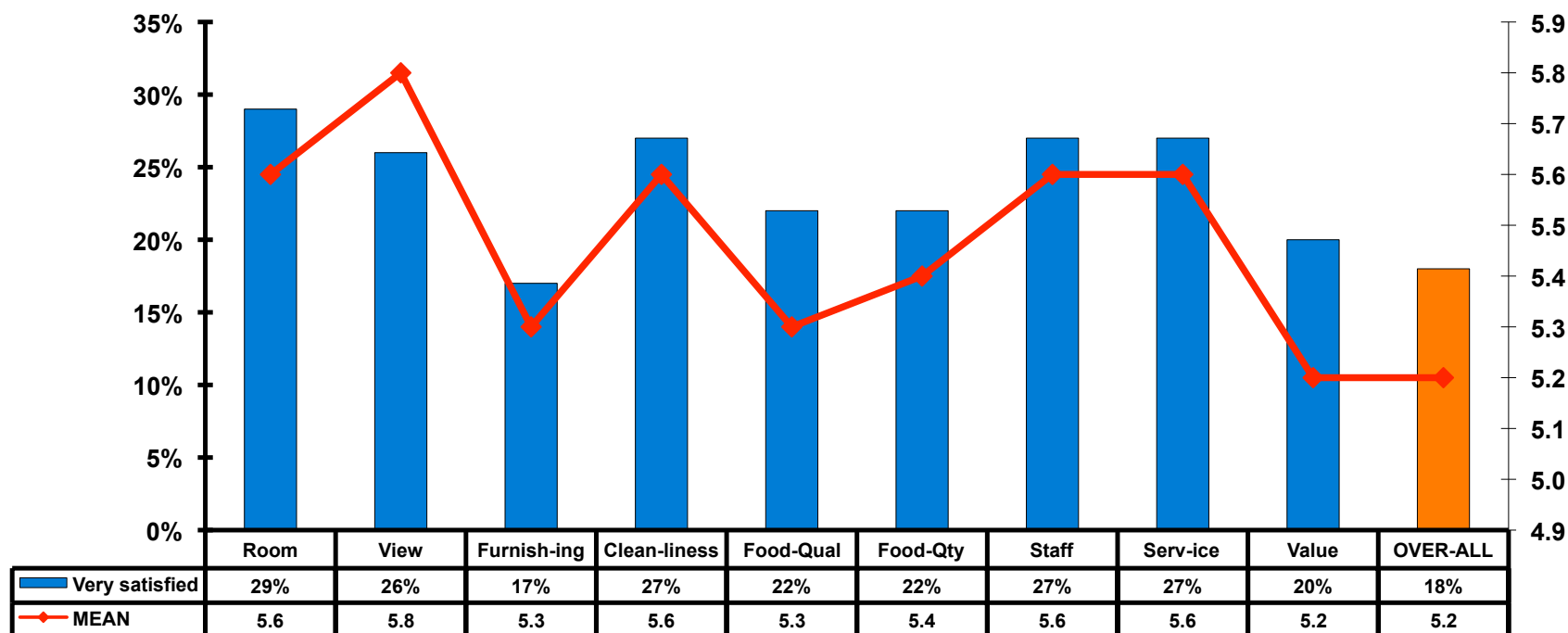
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

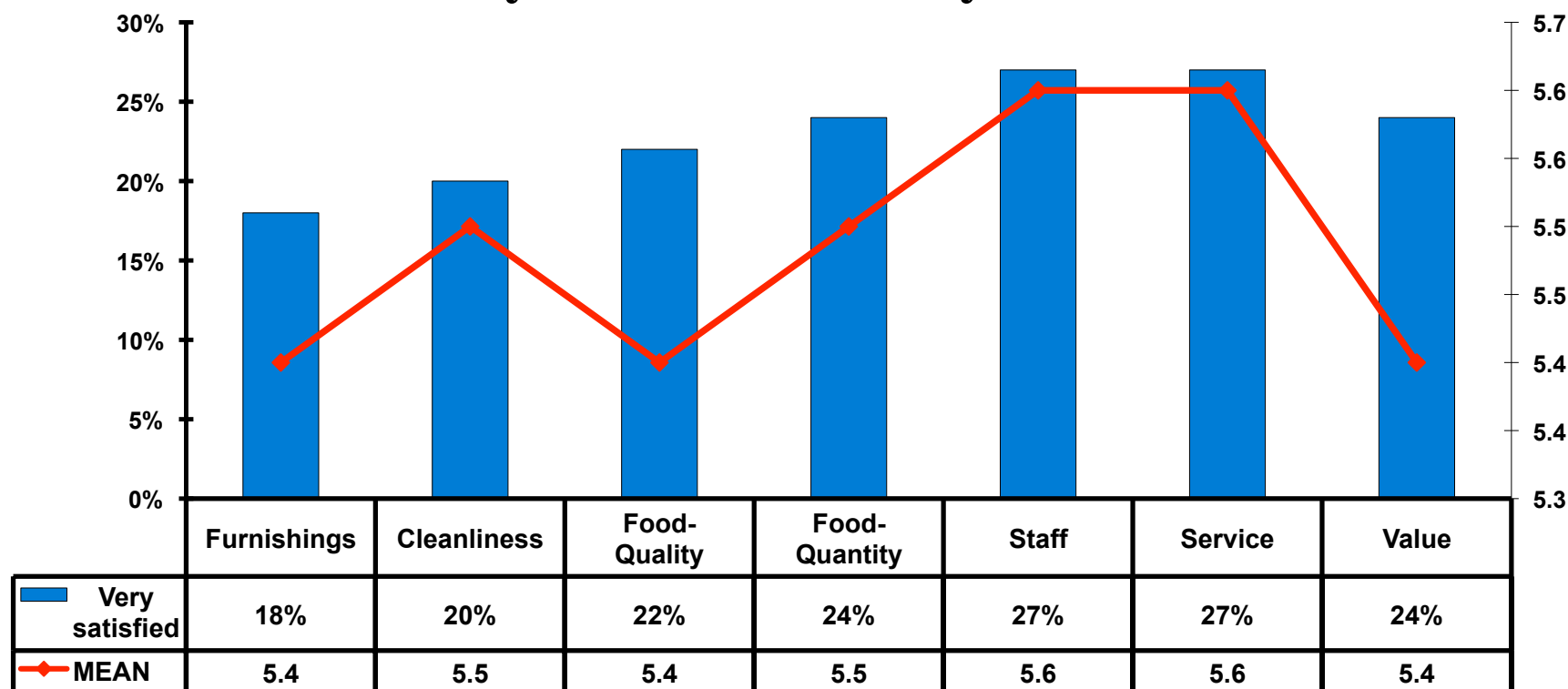
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

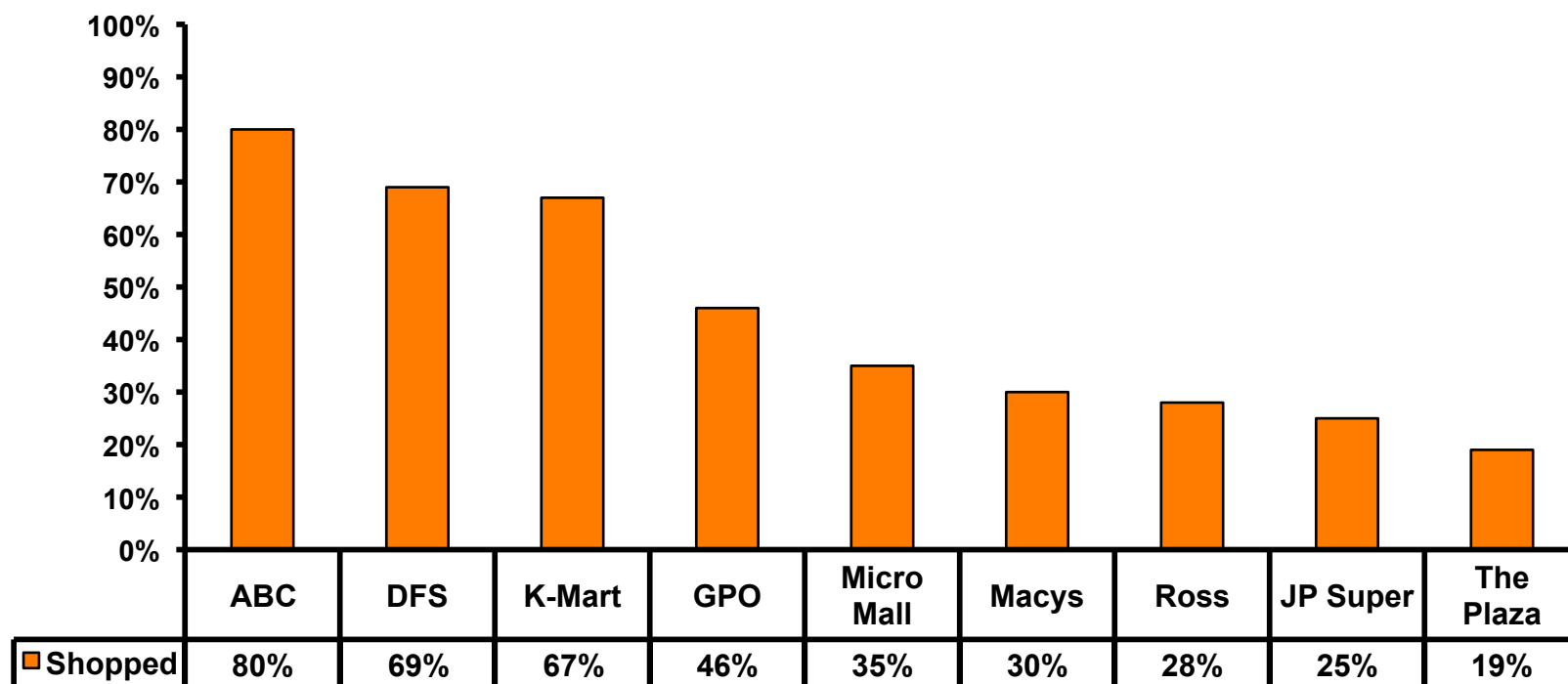
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

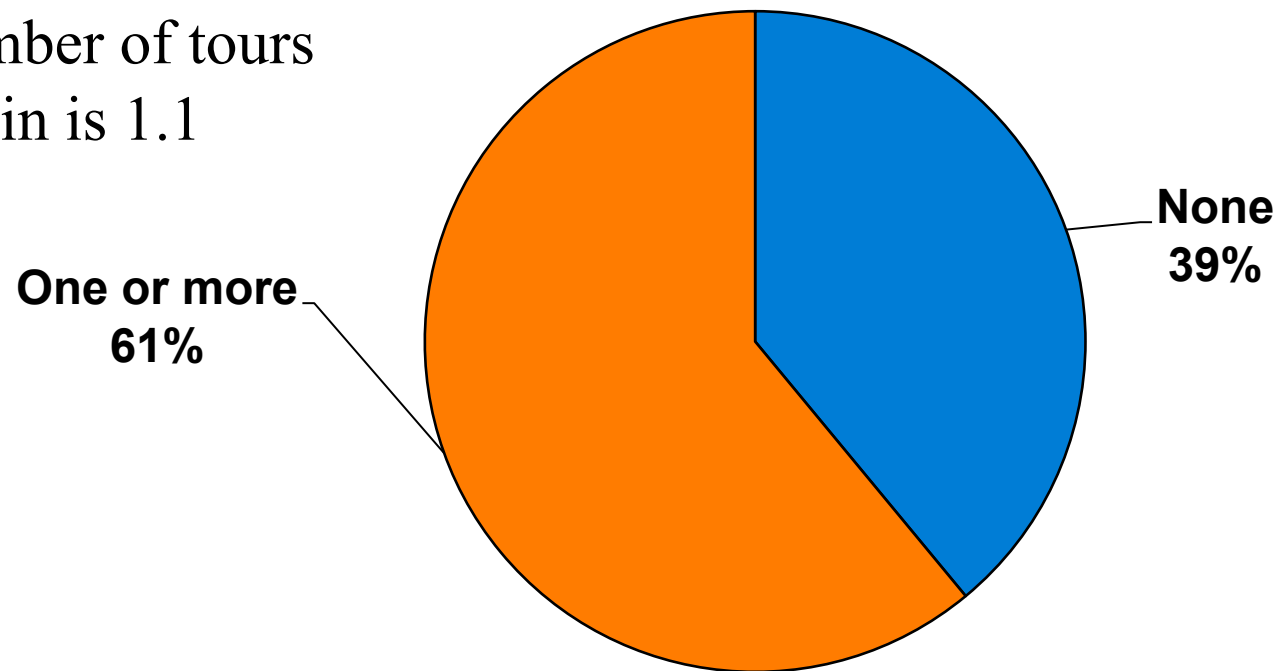
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>42%</b>	Score of 6 to 7 = <b>38%</b>
Score of 4 to 5 = <b>56%</b>	Score of 4 to 5 = <b>56%</b>
Score 1 to 3 = <b>2%</b>	Score 1 to 3 = <b>7%</b>
<b>MEAN = 5.1</b>	<b>MEAN = 5.0</b>

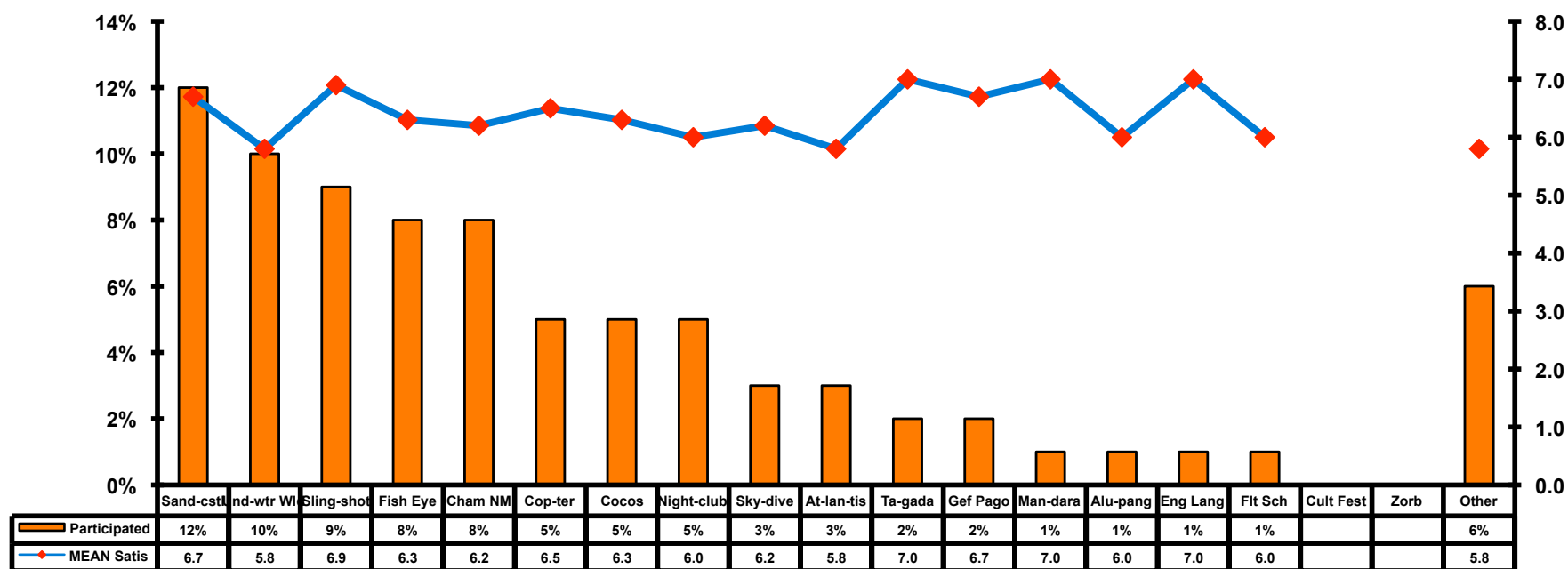
# Optional Tour Participation

- Average number of tours participated in is 1.1



# Optional Tours

## Participation & Satisfaction



# Day Tours Satisfaction

**7pt Rating Scale**

**7=Very Satisfied/ 1=Very Dissatisfied**

<b>Quality of Day Tour</b>	<b>Variety of Day Tour</b>
Score of 6 to 7 = <b>43%</b>	Score of 6 to 7 = <b>42%</b>
Score of 4 to 5 = <b>56%</b>	Score of 4 to 5 = <b>57%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 5.3</b>	<b>MEAN = 5.2</b>

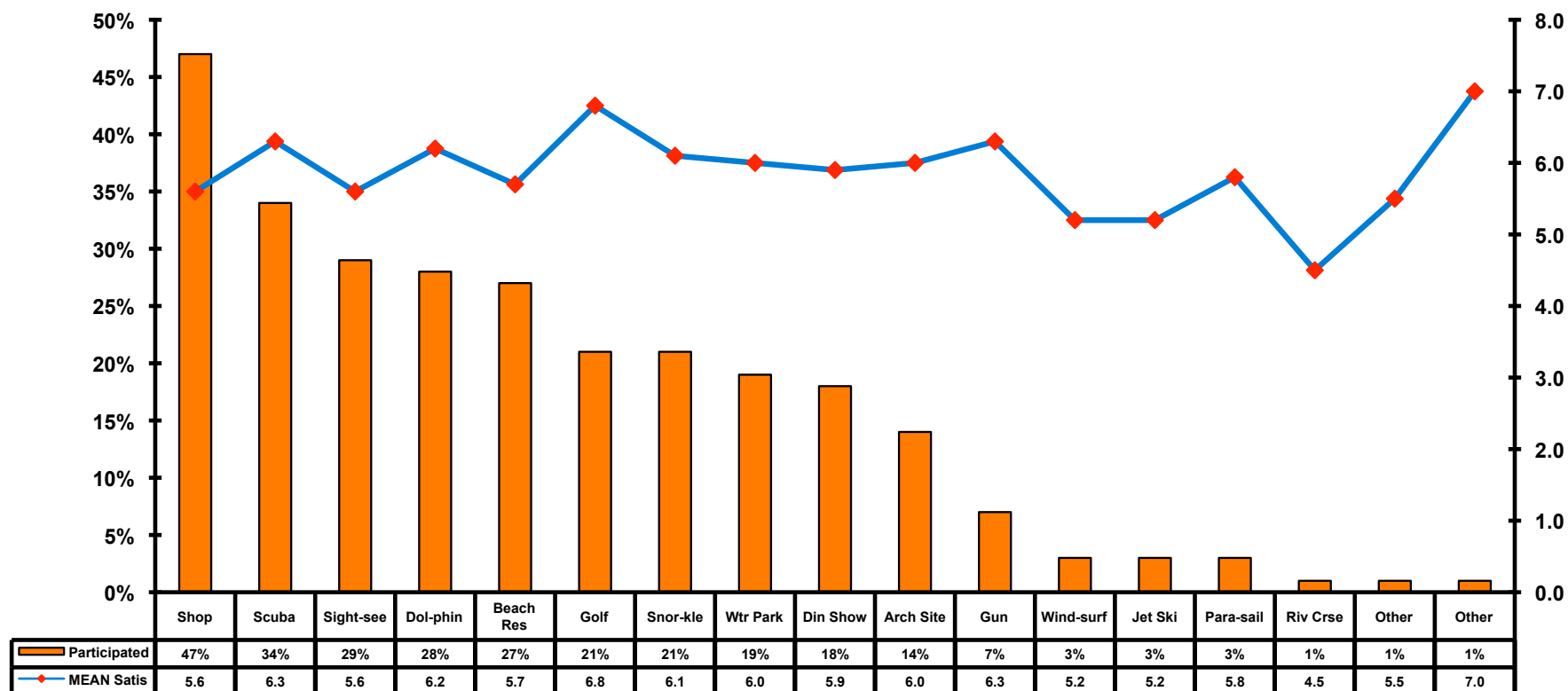
# Night Tours Satisfaction

**7pt Rating Scale**

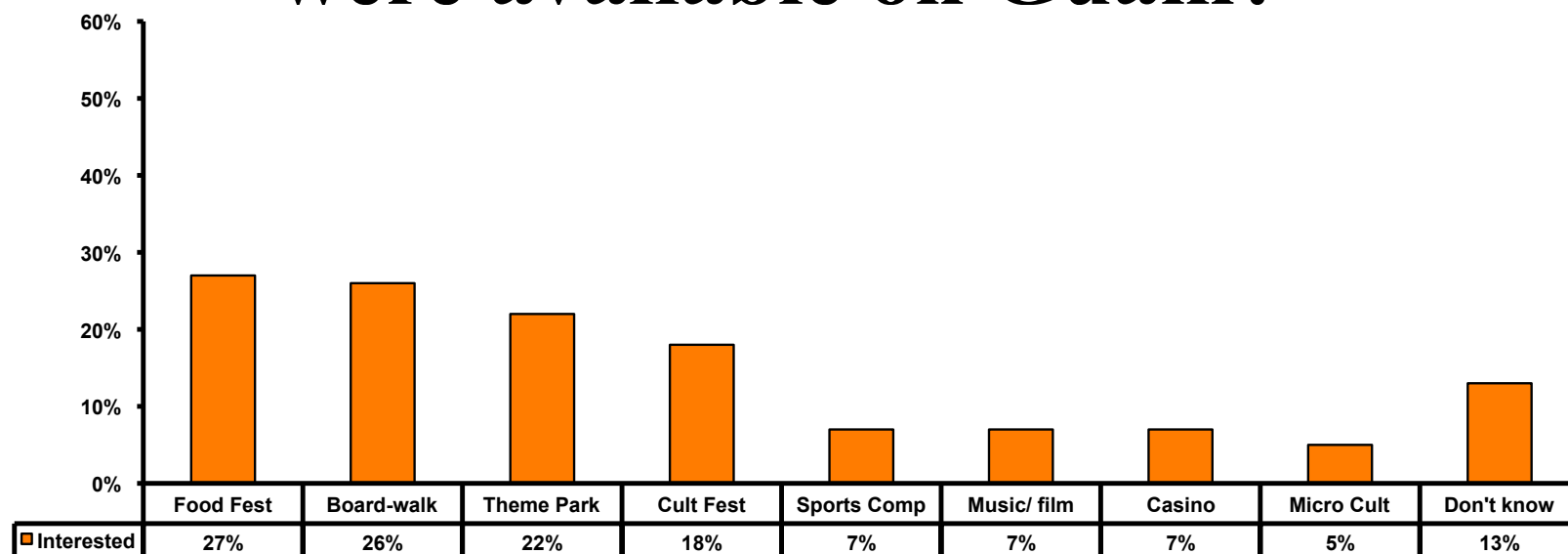
**7=Very Satisfied/ 1=Very Dissatisfied**

<b>Quality of Night Tour</b>	<b>Variety of Night Tour</b>
Score of 6 to 7 = <b>38%</b>	Score of 6 to 7 = <b>37%</b>
Score of 4 to 5 = <b>62%</b>	Score of 4 to 5 = <b>62%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 5.1</b>	<b>MEAN = 5.0</b>

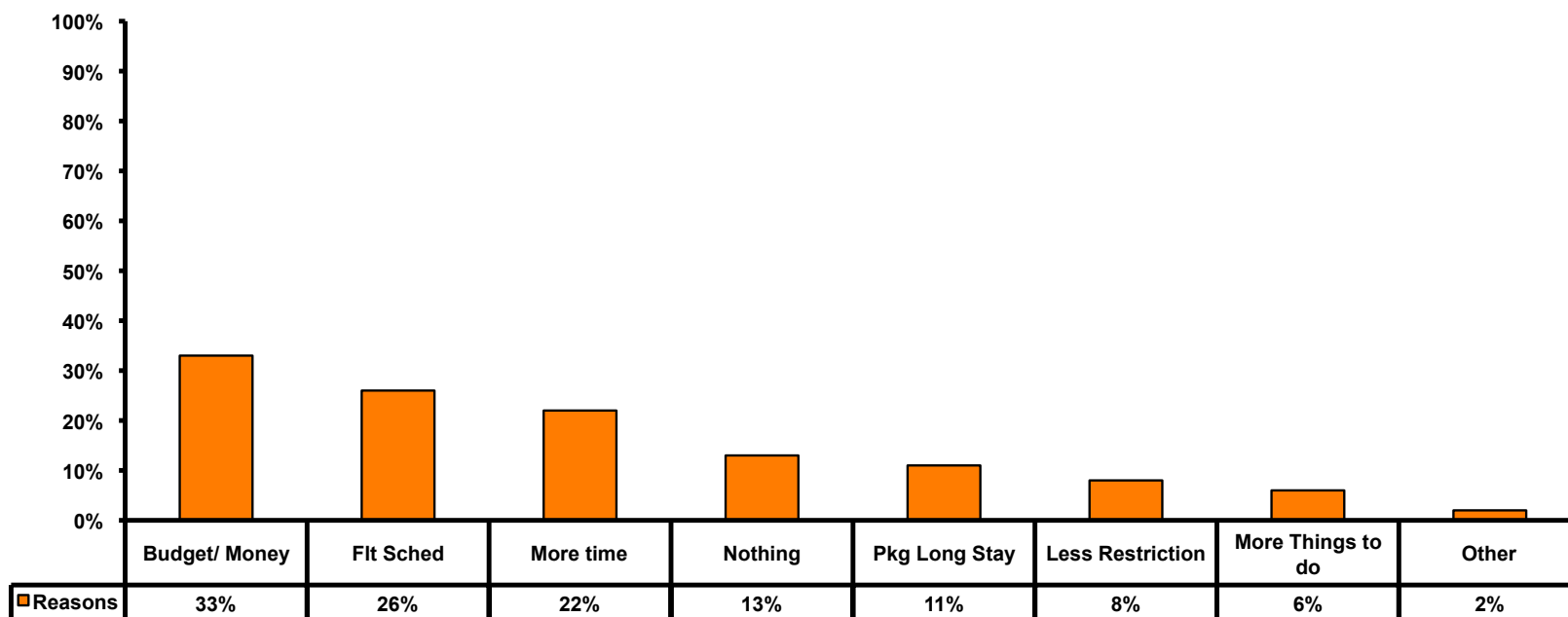
# Satisfaction with Other Activities



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



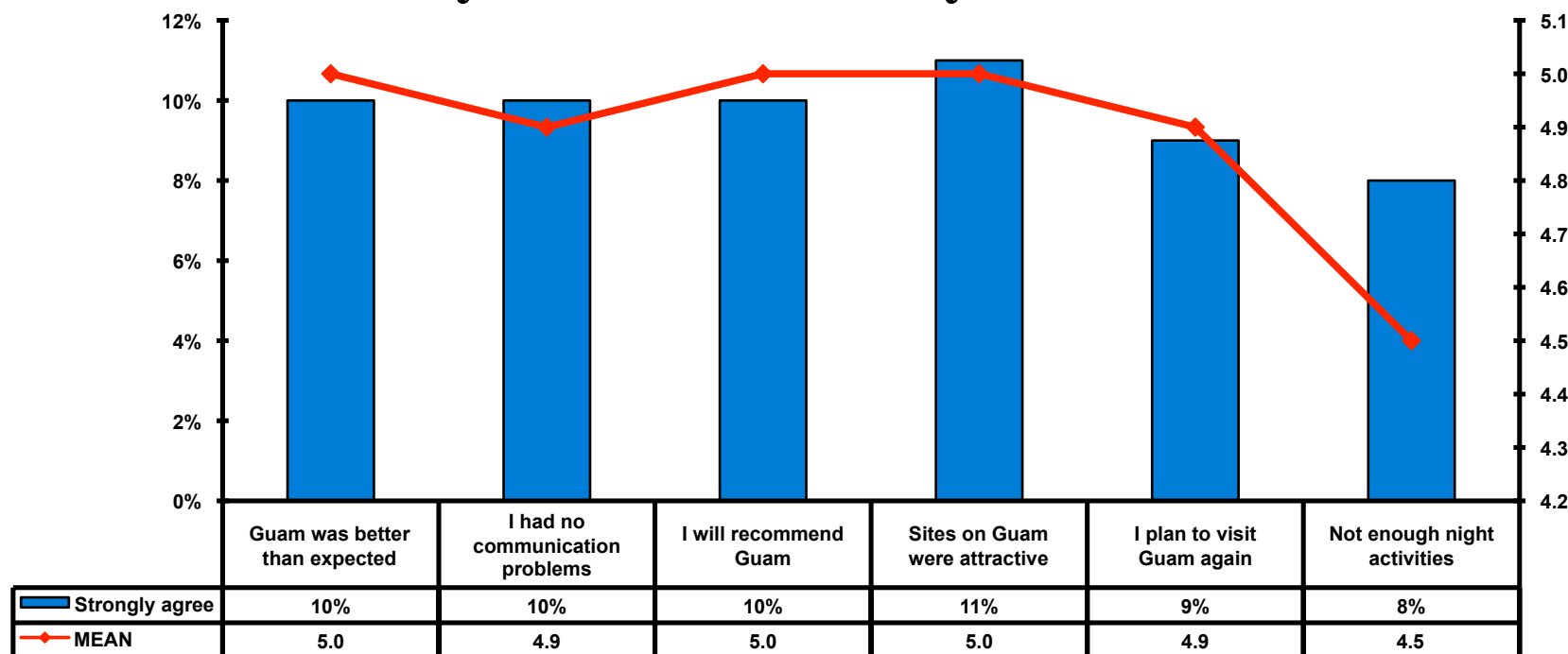
# What would it take to make you want to stay an extra day on Guam?



# On-Island Perceptions

7pt Rating Scale

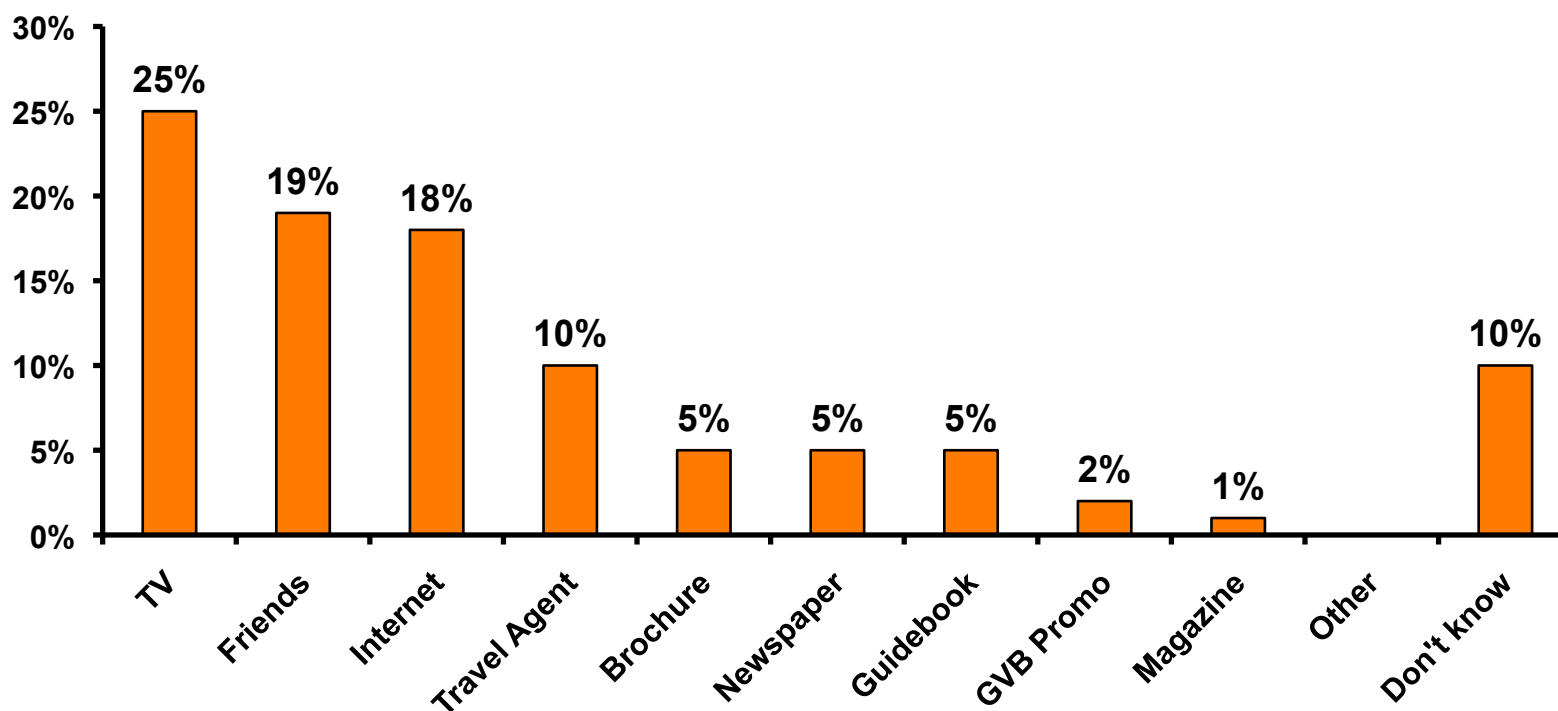
7=Very Satisfied/ 1=Very Dissatisfied



# SECTION 5 **PROMOTIONS**

# Guam Promotion - Media

## Past 90 days

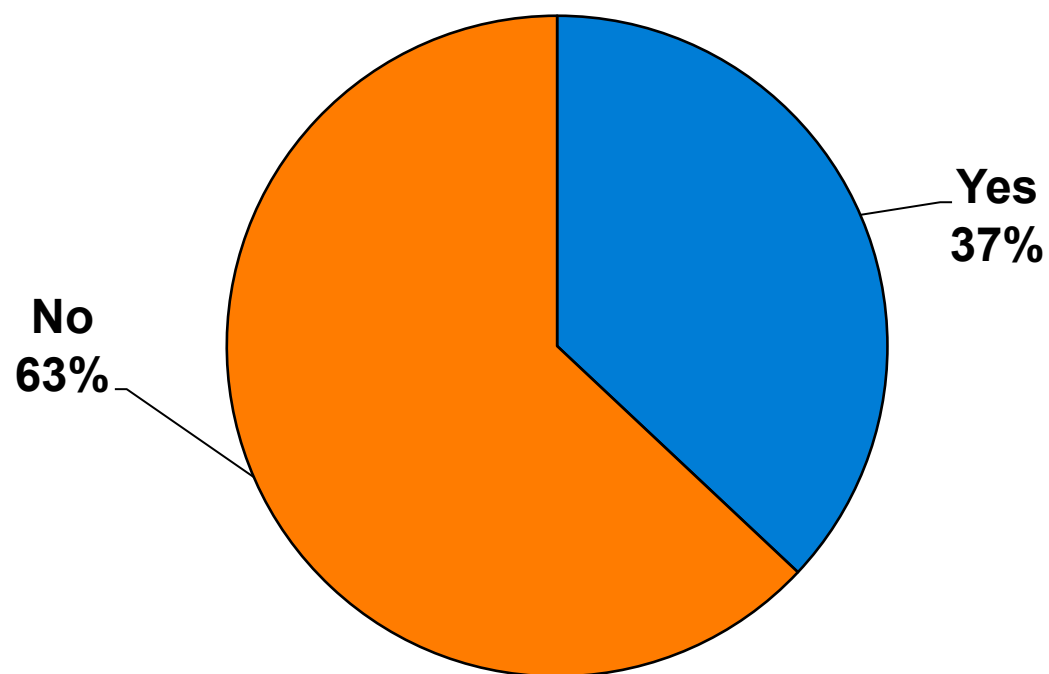


# Marketing Recall

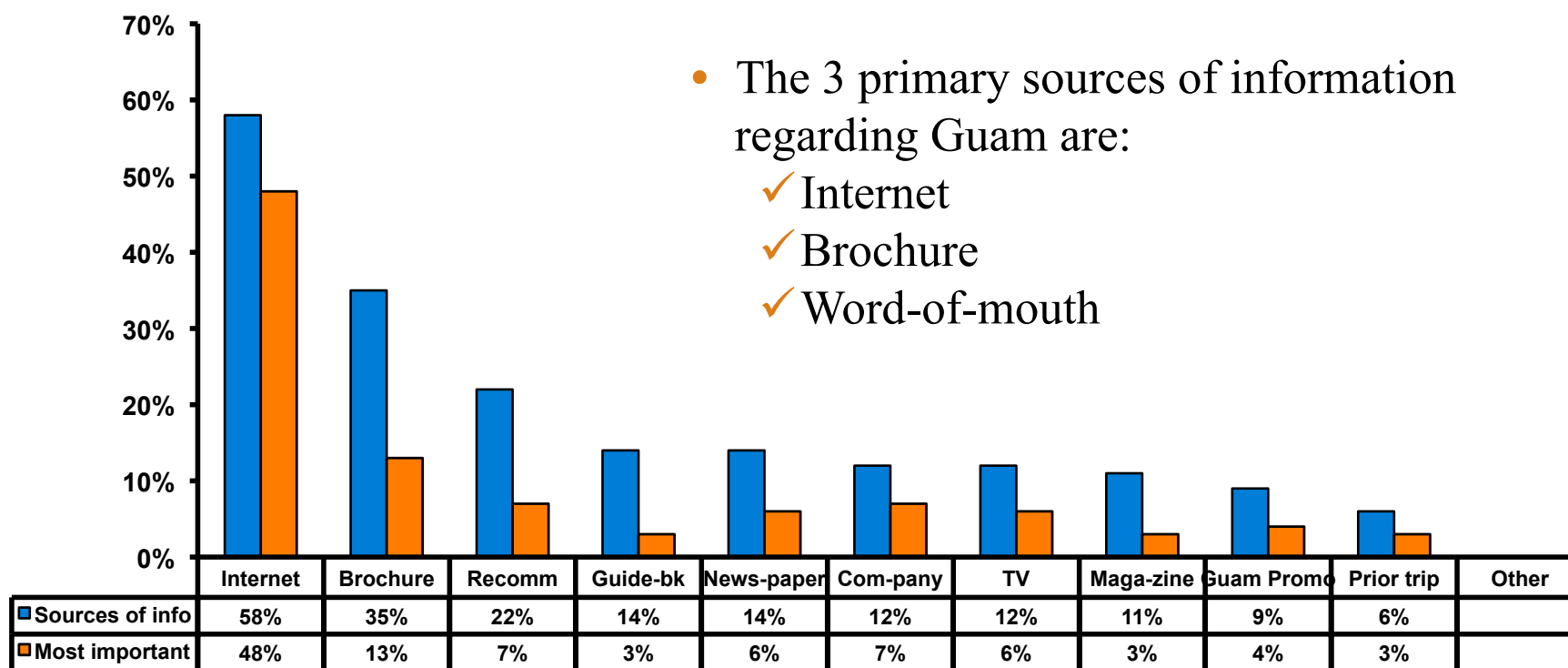
N=137

- 40% Image
- 38% Don't recall
- 20% Tag line
- 2% Other

# GVB Website

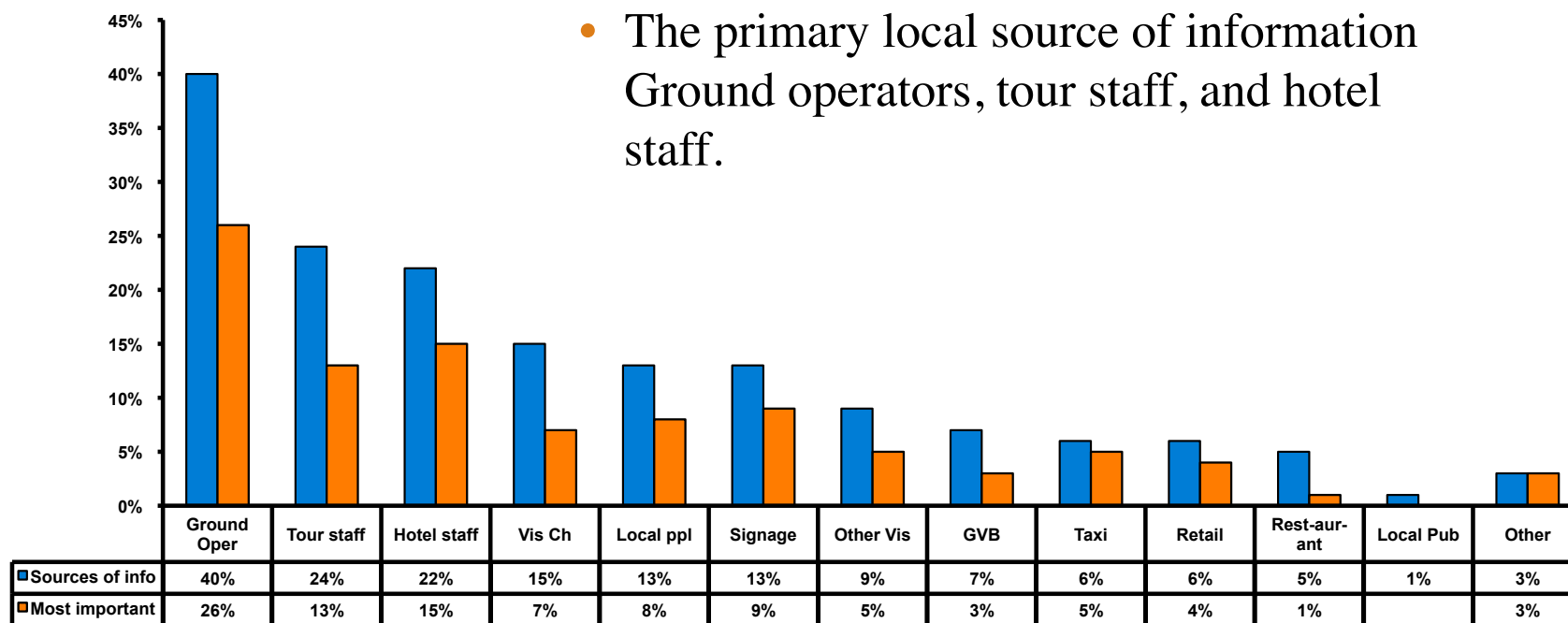


# Sources of Information Pre-arrival



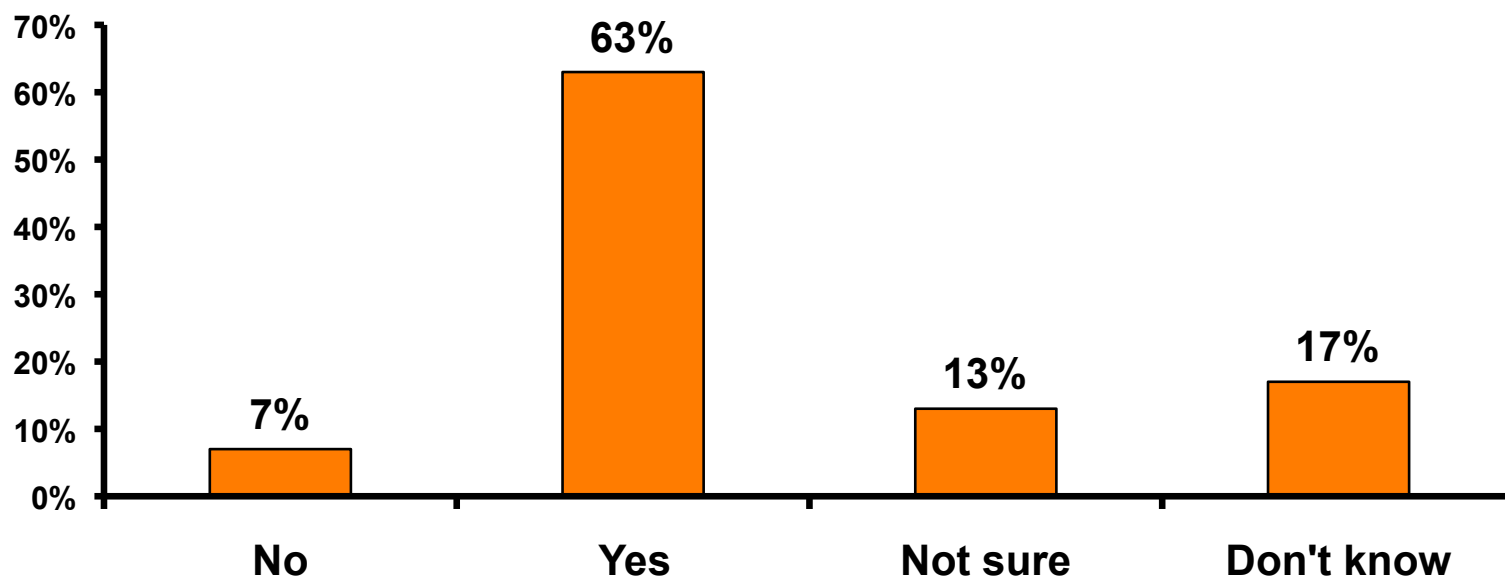
# Sources of Information Post-arrival

- The primary local source of information  
Ground operators, tour staff, and hotel staff.



# SECTION 6 **OTHER ISSUES**

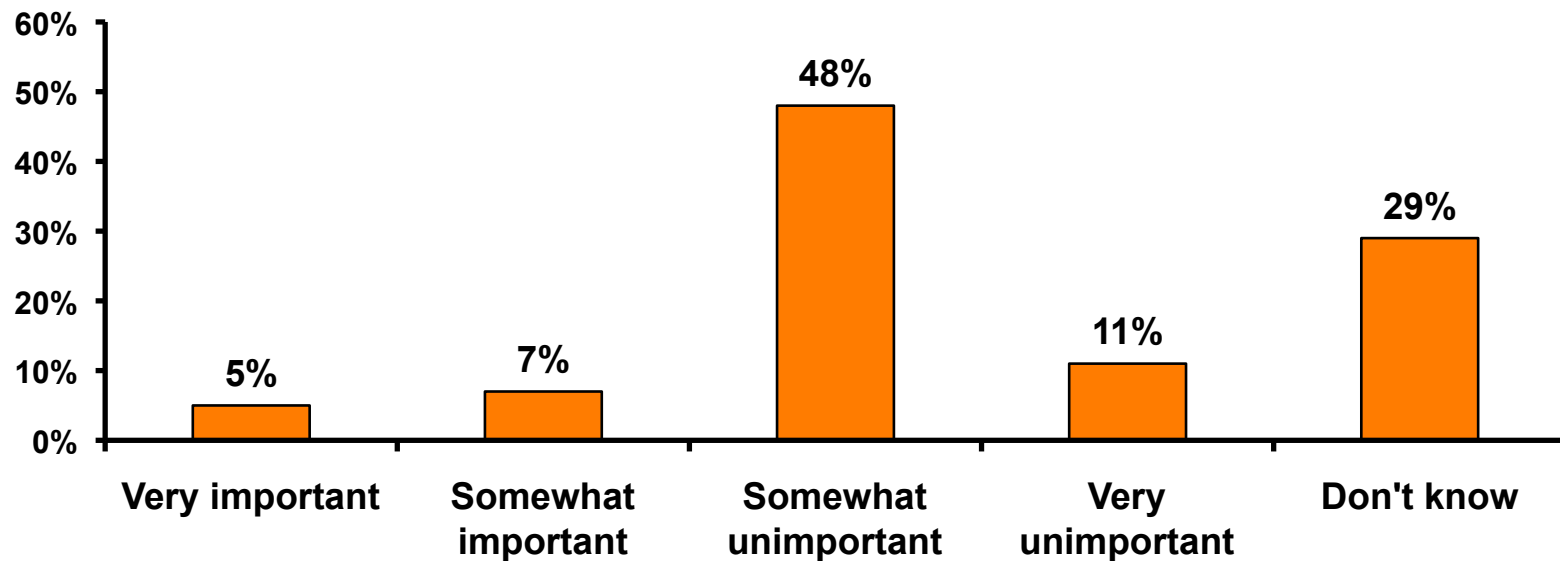
## Good time to spend money on travel outside of Taiwan - Overall



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

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<595K	595K-1,784K	1,784K-2,973K	2,973K+	Refused
Q.22	No		5%	11%	4%		16%	4%			
	Yes	100%	57%	61%	78%	50%	47%	72%	57%	50%	
	Not sure		14%	18%	4%	10%	13%	18%	29%		
	Do not know		23%	11%	13%	40%	25%	7%	14%	50%	100%
Total	Count	2	56	57	23	10	32	57	7	2	1

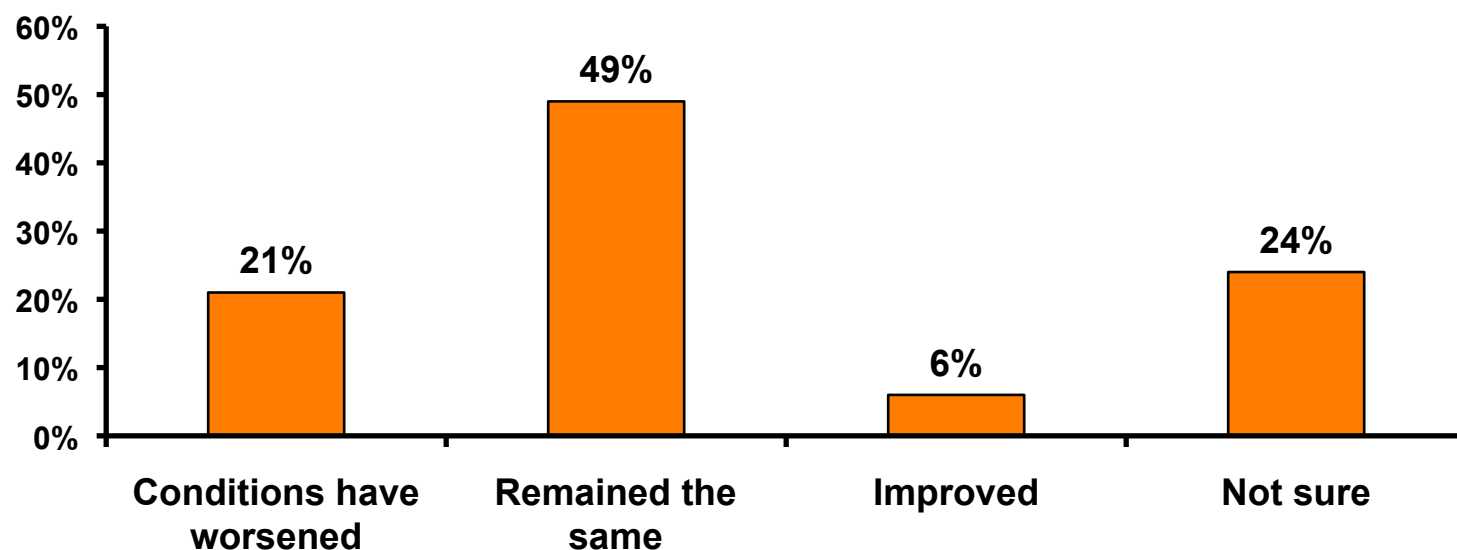
# The importance of the state of the Taiwanese economy in decision to travel outside of Taiwan - Overall



# 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+	<595K	595K-1,784K	1,784K-2,973K	2,973K+	Refused
Q.23	Very unimportant		15%	11%	8%		19%	11%	14%		
	Somewhat unimportant		40%	56%	54%	40%	25%	58%	14%		
	Somewhat important	50%	9%	4%	4%	10%	6%	7%	29%	50%	
	Very important		4%	9%		10%	13%	4%		50%	
	Don't know	50%	33%	21%	33%	40%	38%	21%	43%		100%
Total	Count	2	55	57	24	10	32	57	7	2	1

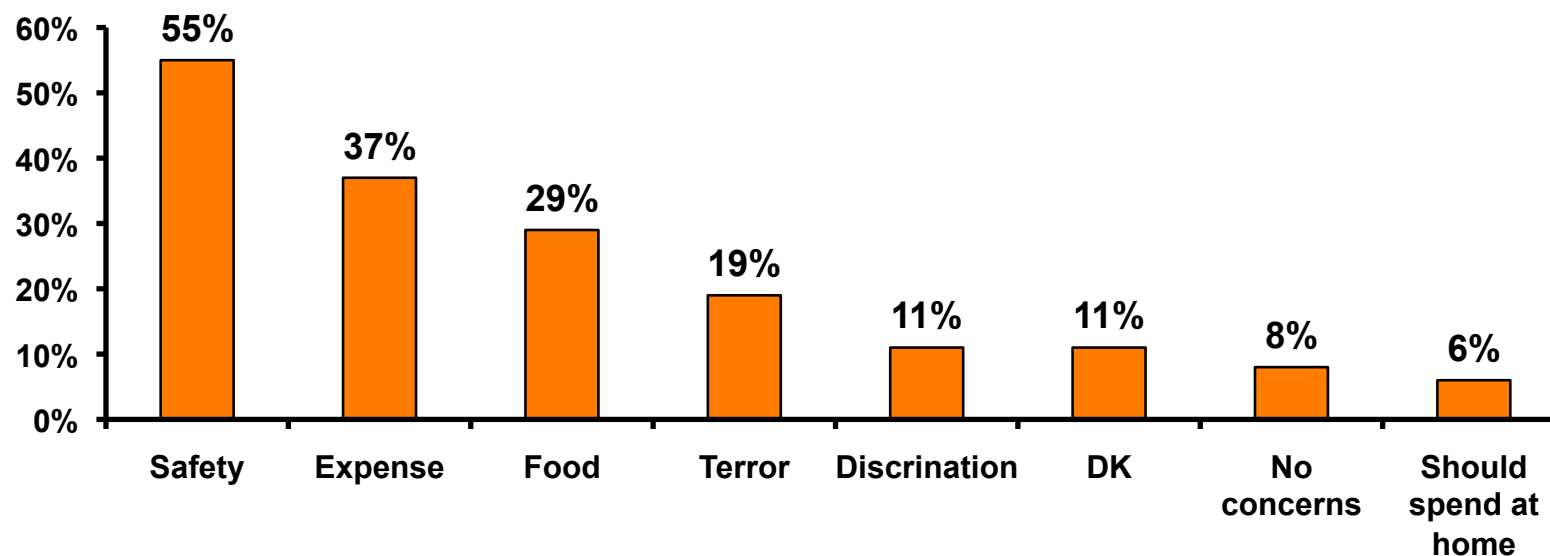
# Rating Taiwanese Economy Compared to 12 months ago



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

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<595K	595K-1,784K	1,784K-2,973K	2,973K+	Refused
Q.21	Conditions have worsened		18%	28%	13%	20%	34%	19%	29%	50%	
	Conditions have remained the same		39%	51%	75%	50%	38%	56%	43%	50%	
	Conditions have improved	50%	7%	5%			3%	7%	14%		
	Do not know	50%	36%	16%	13%	30%	25%	18%	14%		100%
Total	Count	2	56	57	24	10	32	57	7	2	1

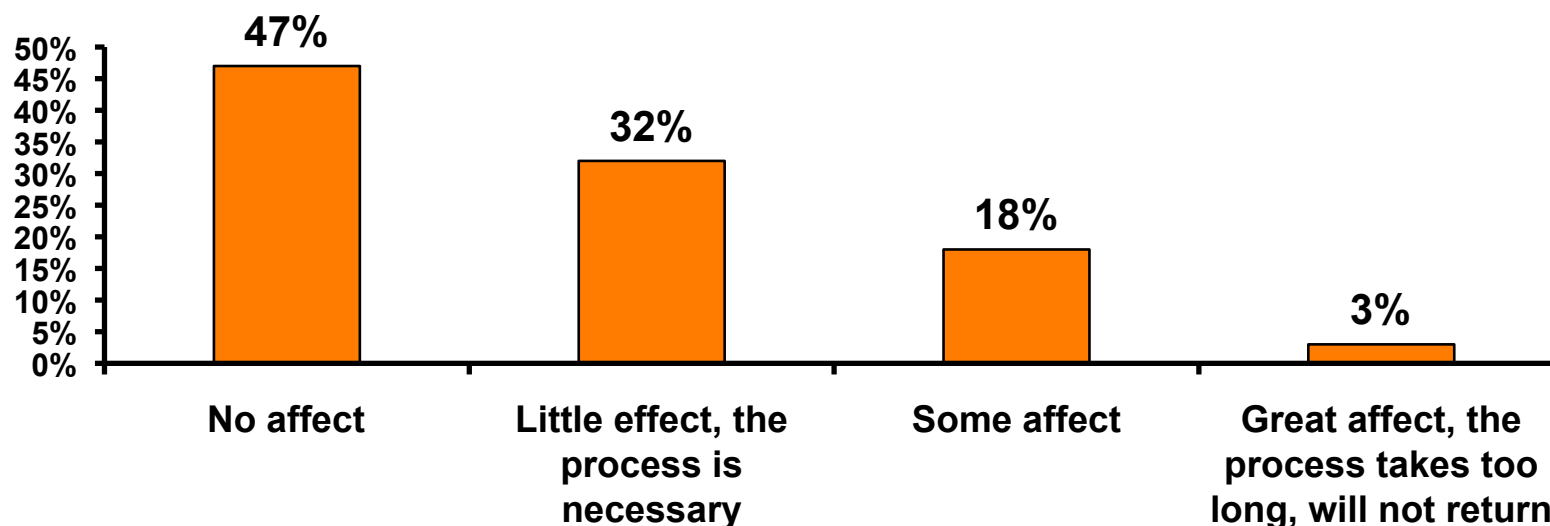
# Concerns about travel outside of Taiwan - Overall



# Concerns about travel outside of Taiwan - By Age & Income

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<595K	595K-1,784K	1,784K-2,973K	2,973K+	Refused
Q.24	Safety at my destination	50%	57%	56%	50%	50%	66%	56%	57%	100%	100%
	Expense	100%	41%	39%	33%		63%	35%	57%		
	Food	50%	30%	33%	17%	20%	50%	30%	43%	50%	
	Terrorism		18%	18%	33%	10%	6%	26%	14%	50%	
	Discrimination against Taiwanese		13%	11%	17%		22%	11%	14%		
	Don't know		9%	9%	8%	40%	6%	9%	14%		
	No concerns		13%	5%	13%		3%	7%			
	Spending money abroad when it should be spent at home		5%	7%	8%		9%	4%	14%		
	Other		2%				3%		14%		
Total	Cases	2	56	57	24	10	32	57	7	2	1

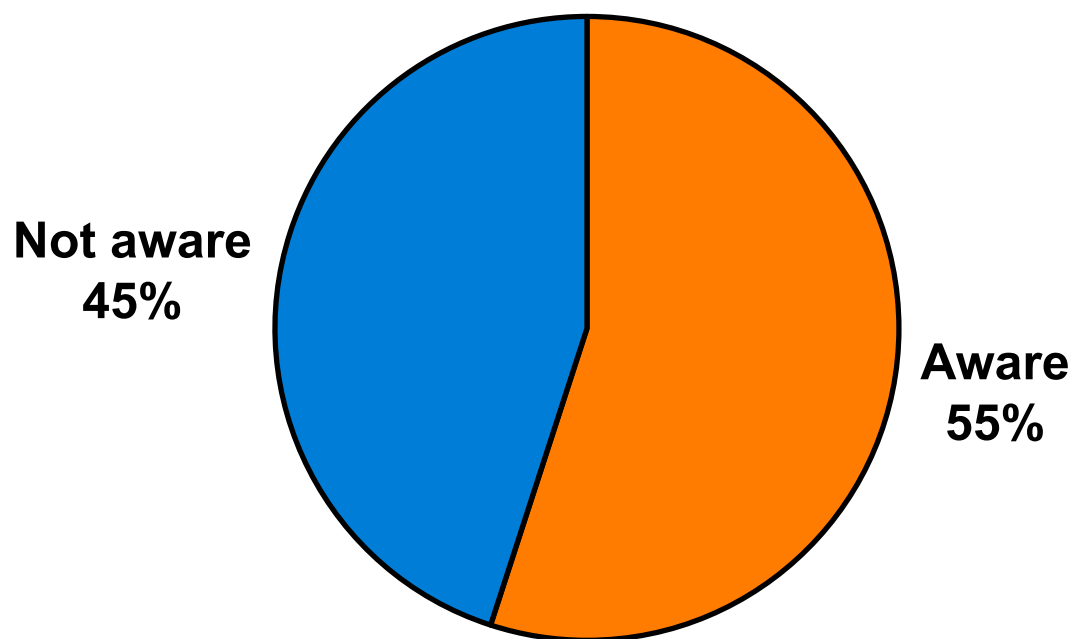
# Security Screening/ Immigration Process at Guam International Airport



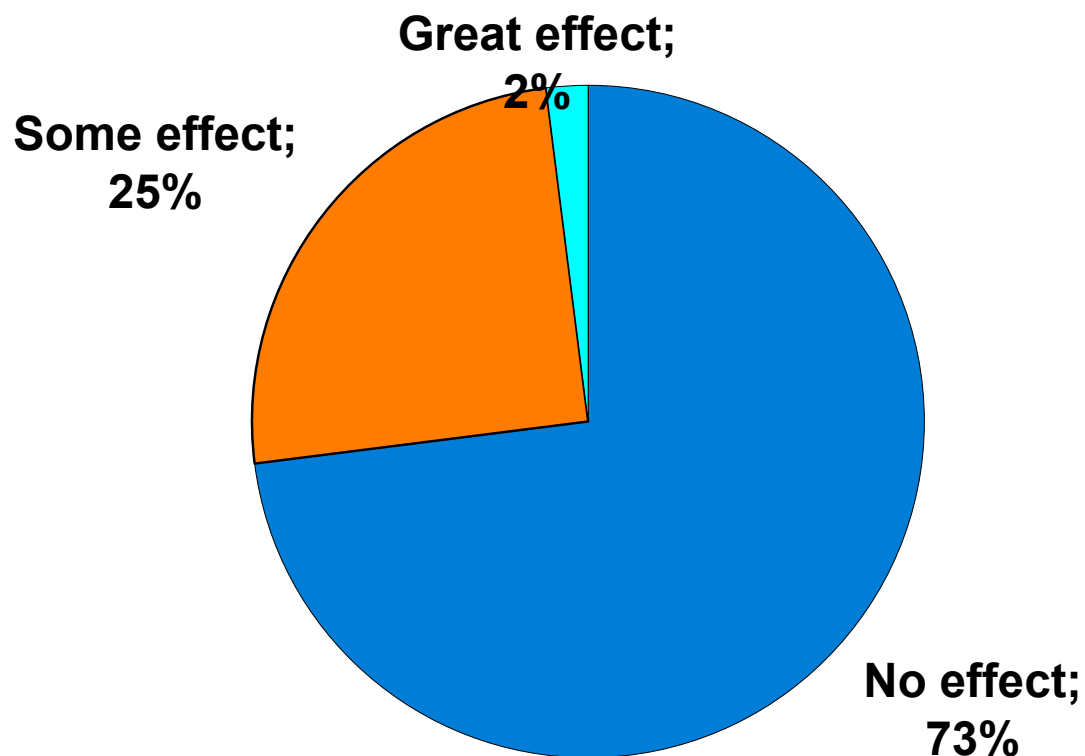
## **Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum**

- Mean Rating – **4.0** out of possible 7.0
- Agree (Score 6-7) – **16%**
- Neutral (Score 4-5) – **58%**
- Disagree (Score 1-3) – **25%**

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



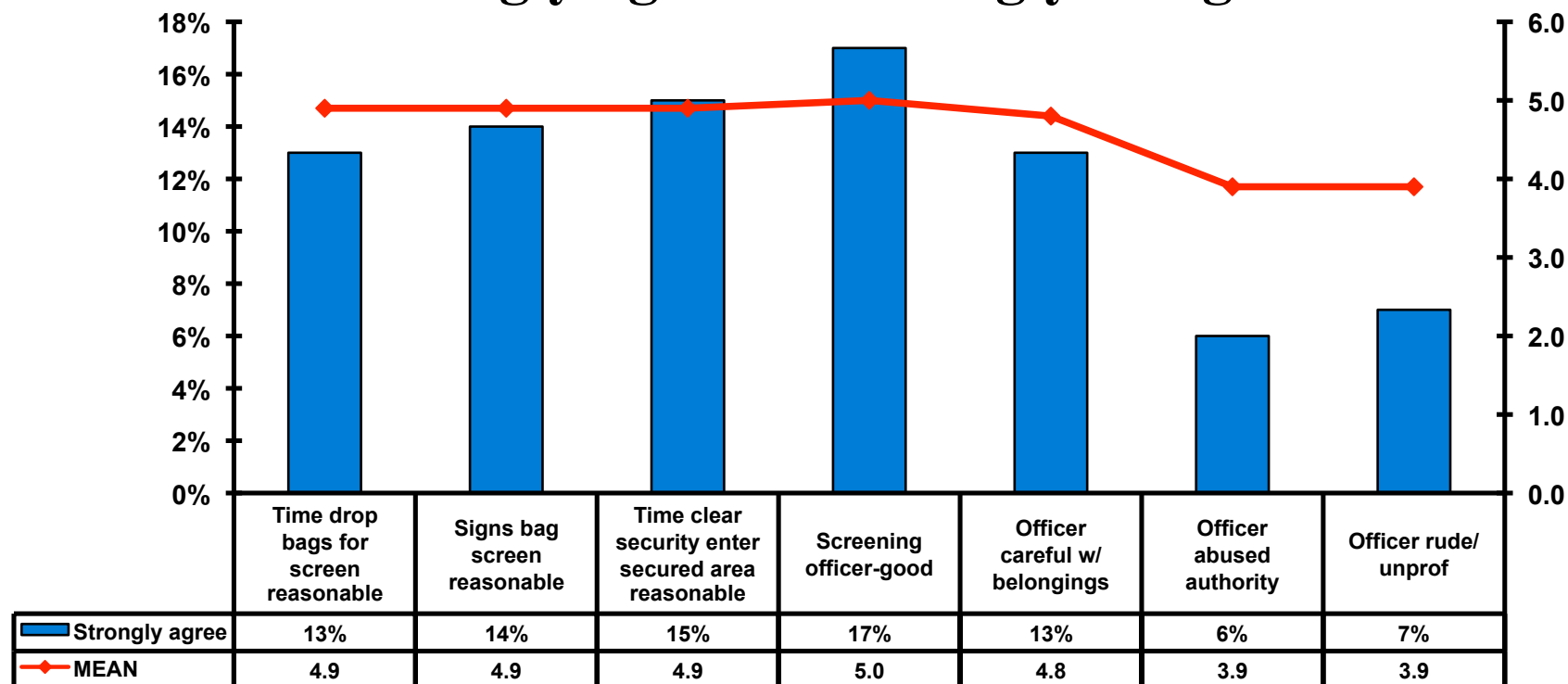
# Effects of U.S. military troop movement on future trips to Guam



# Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



# Likelihood of travel outside of Korea within the next 6 to 24 months

