



GUAM VISITORS BUREAU

Taiwan Visitor Tracker Exit Profile

FY2013

1st Qtr. (OCT~DEC 2012)



Prepared by: QMark Research

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Background & Methodology

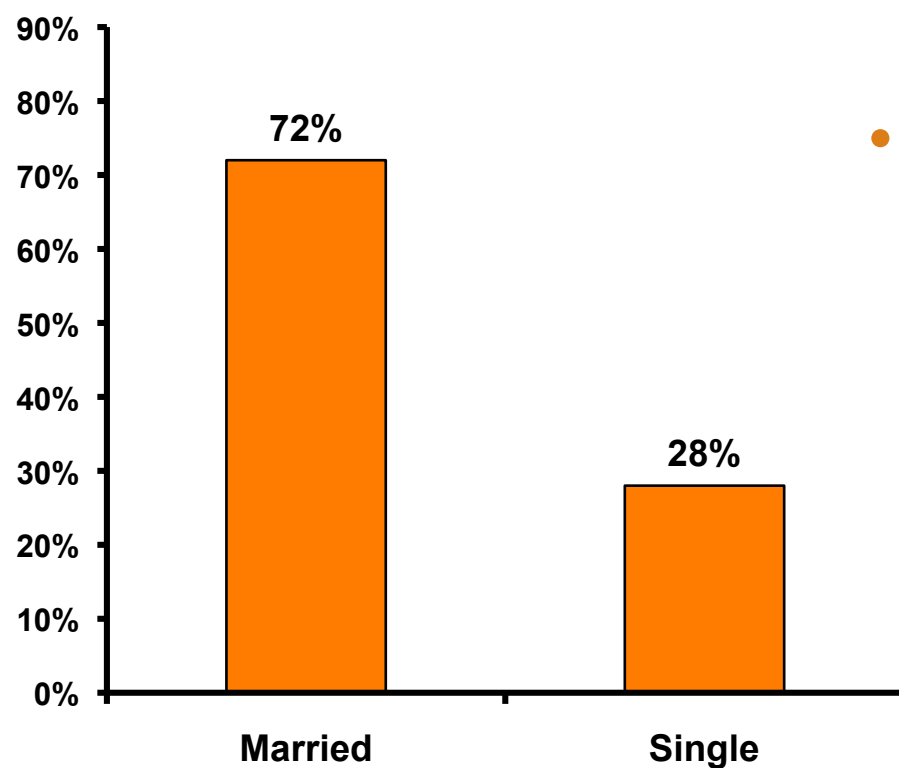
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Taiwanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **150** departing Taiwan 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 +/- 8.00 percentage points with a 95% confidence level. That is, if all Taiwan 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 Taiwan seasonal campaigns in attracting Taiwan visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Taiwan marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

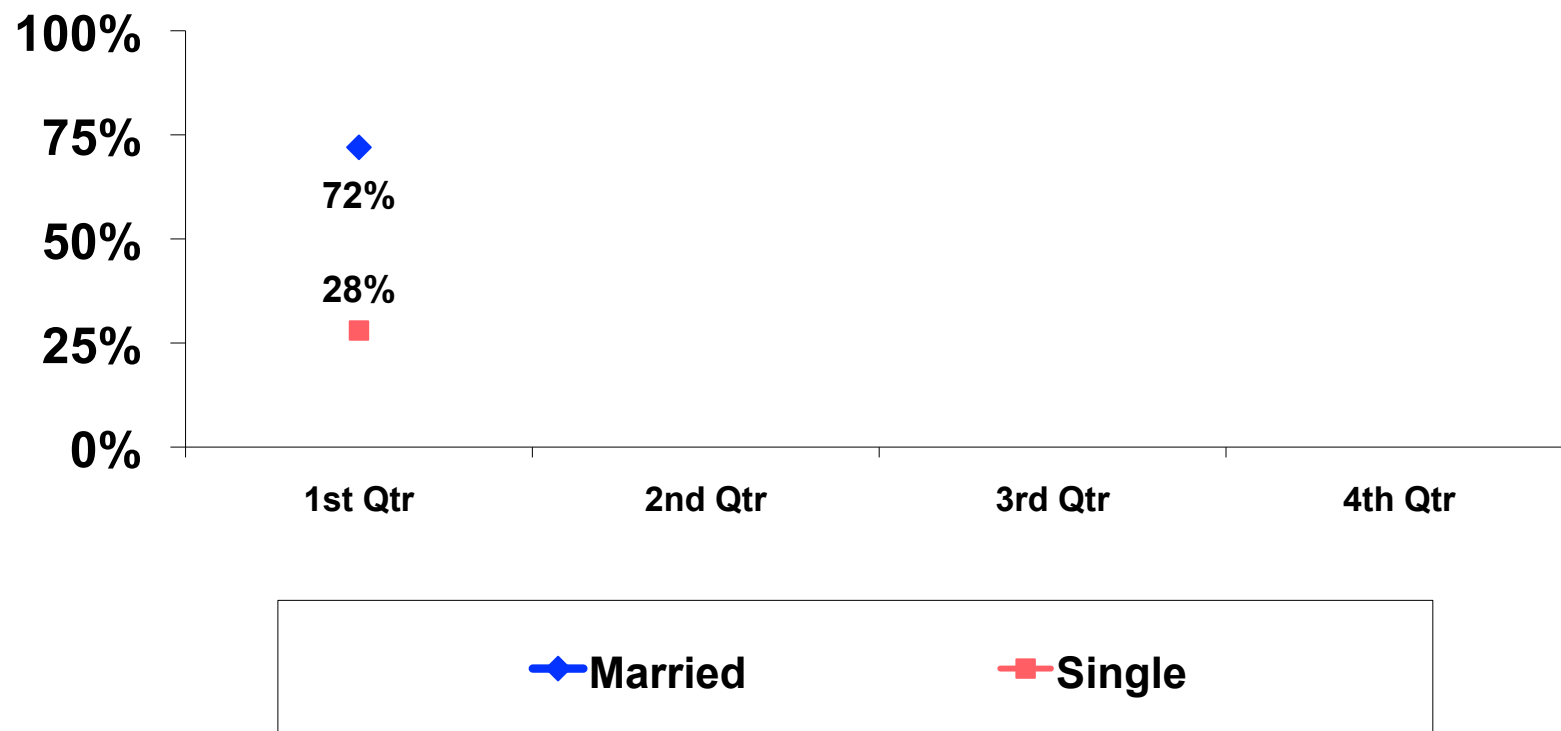
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

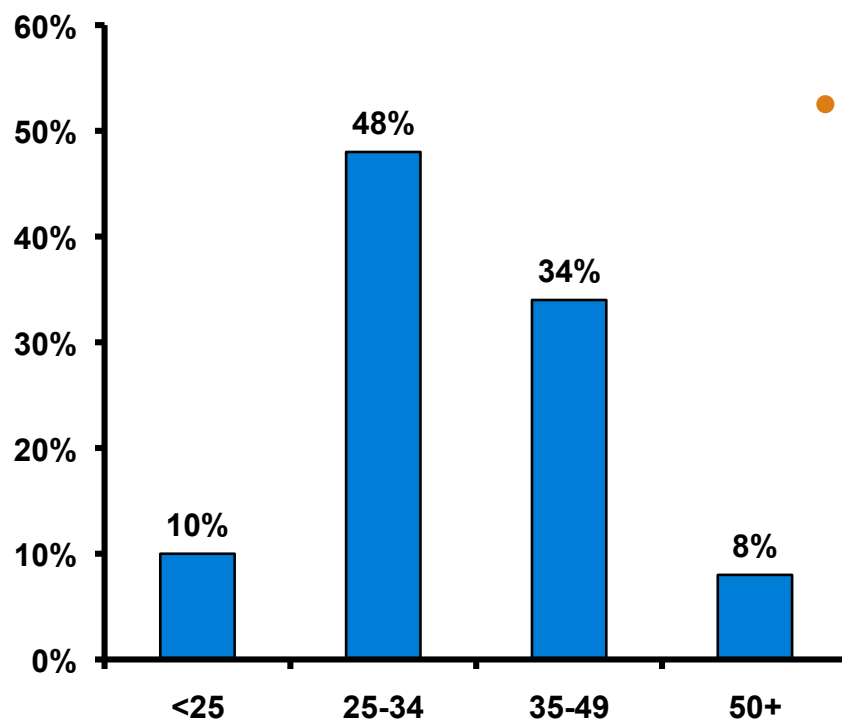


- Majority of Taiwanese visitors are married.

Marital Status

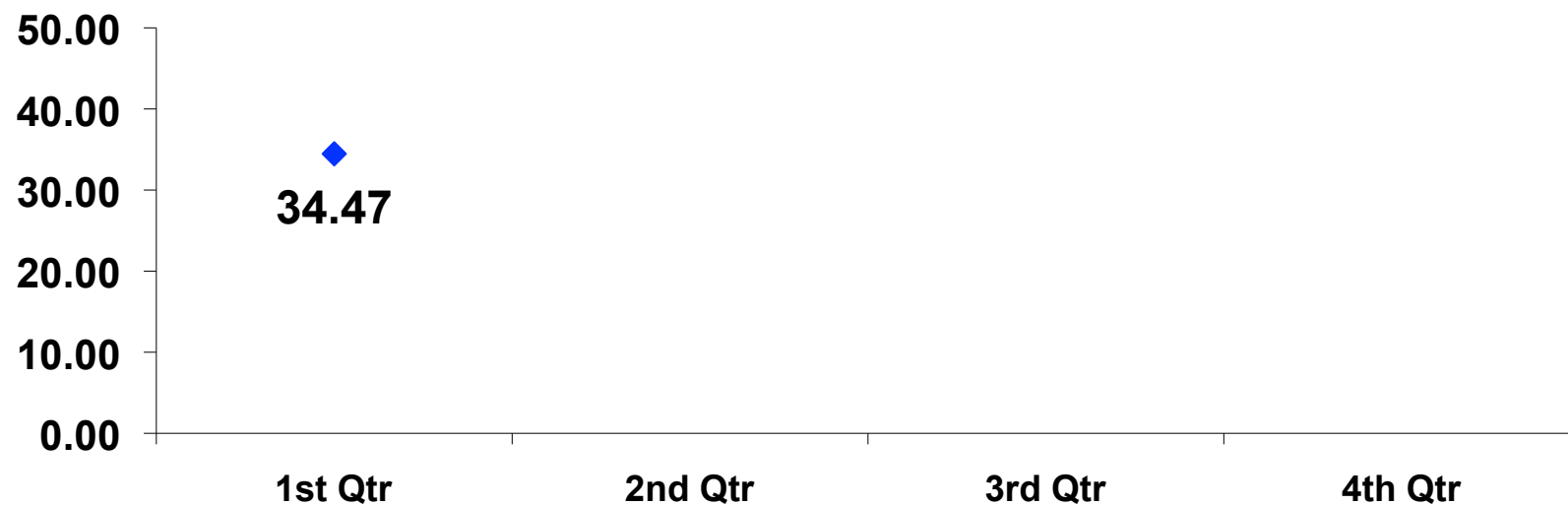


Age - Overall



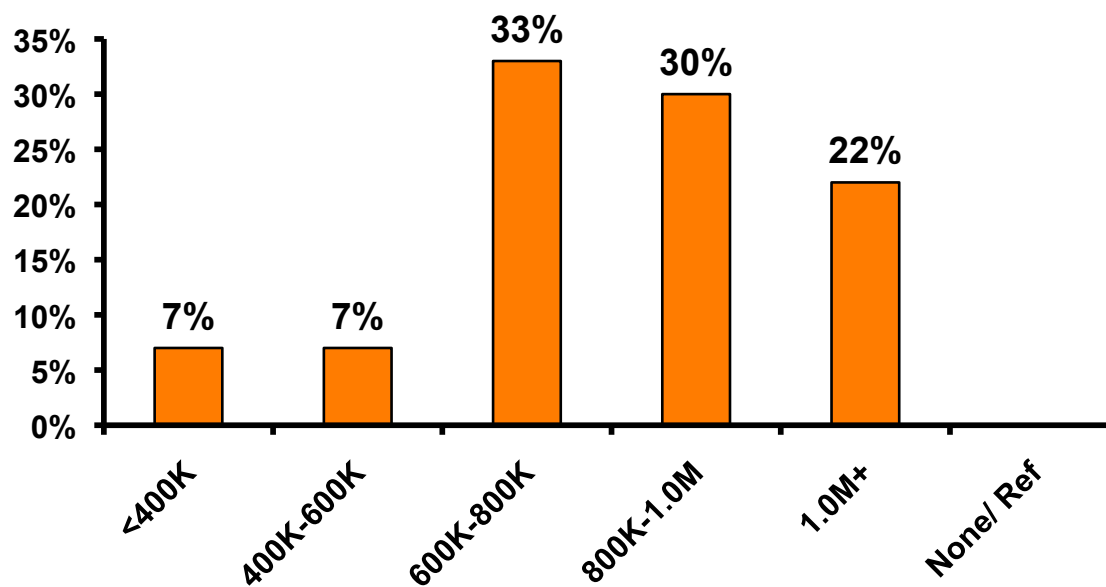
- The average age of the respondents is 34.47 years of age.

Average Age

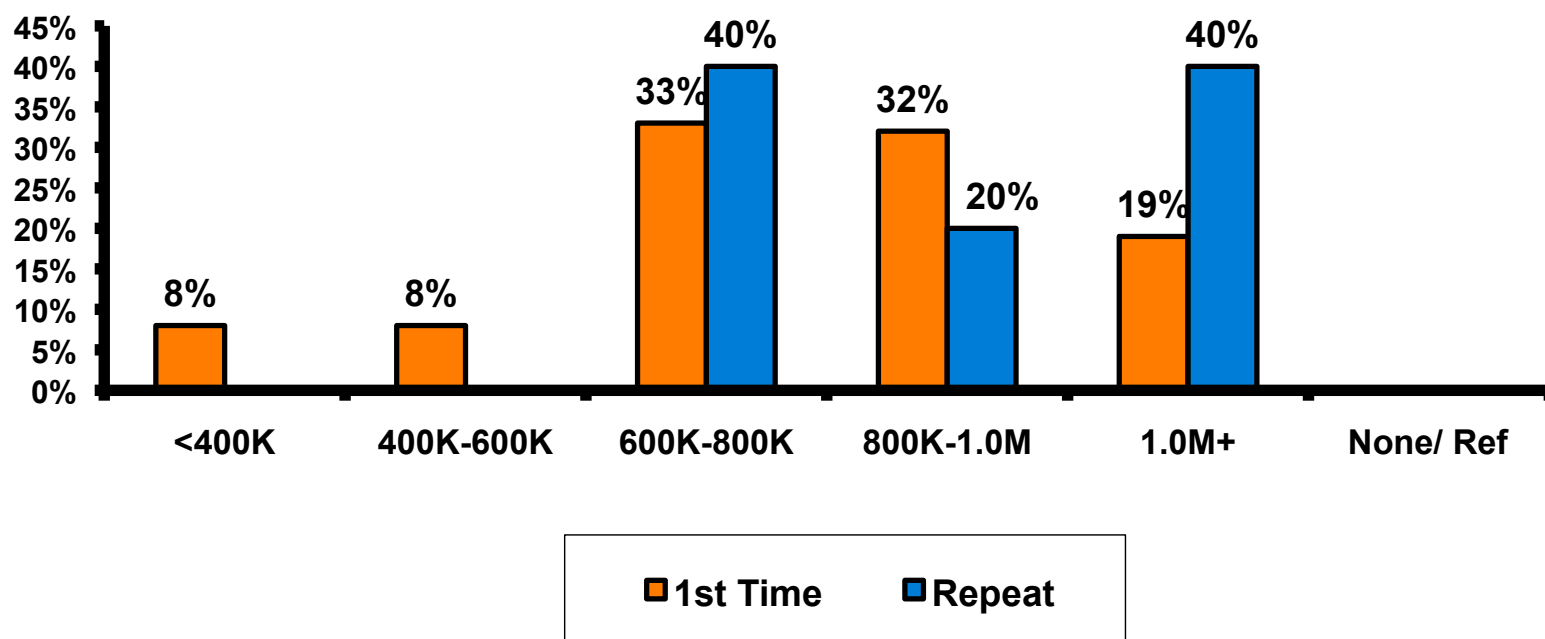


Personal Income

- TWD29.0120 = \$1



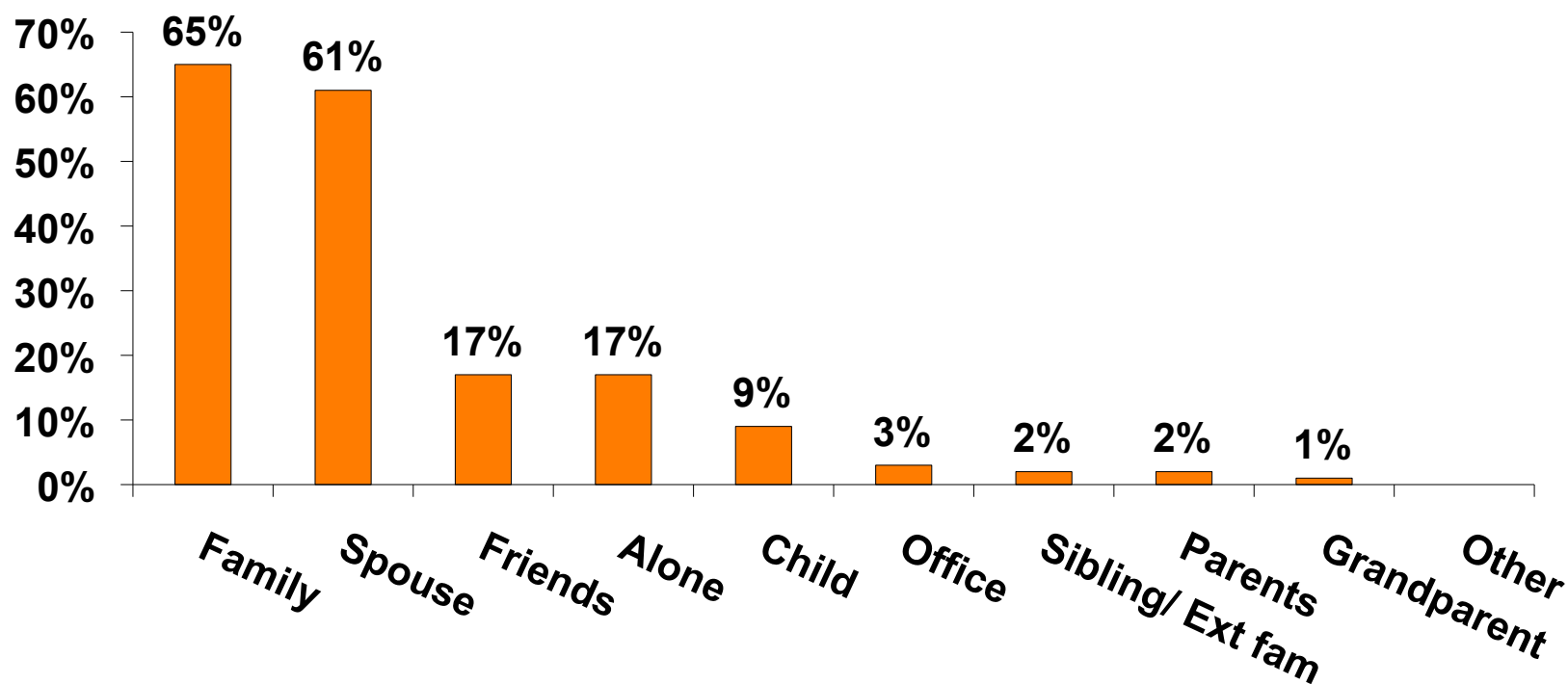
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<=NT160K	Count	4	2	2		4		
		Column N %	4%	5%	4%		9%		
	NT160K-NT200K	Count	1	1			1		
		Column N %	1%	2%			2%		
	NT200K-NT400K	Count	2	1	1	1	1		
		Column N %	2%	2%	2%	20%	2%		
	NT400K-NT600K	Count	7	2	5	1	3	3	
		Column N %	7%	5%	10%	20%	6%	9%	
	NT600K-NT800K	Count	32	12	20	2	18	10	1
		Column N %	33%	27%	38%	40%	38%	29%	13%
	NT800K-NT1.0M	Count	29	13	16	1	12	12	4
		Column N %	30%	30%	31%	20%	26%	34%	50%
	NT1.0M+	Count	21	13	8		8	10	3
		Column N %	22%	30%	15%		17%	29%	38%
	Total	Count	96	44	52	5	47	35	8

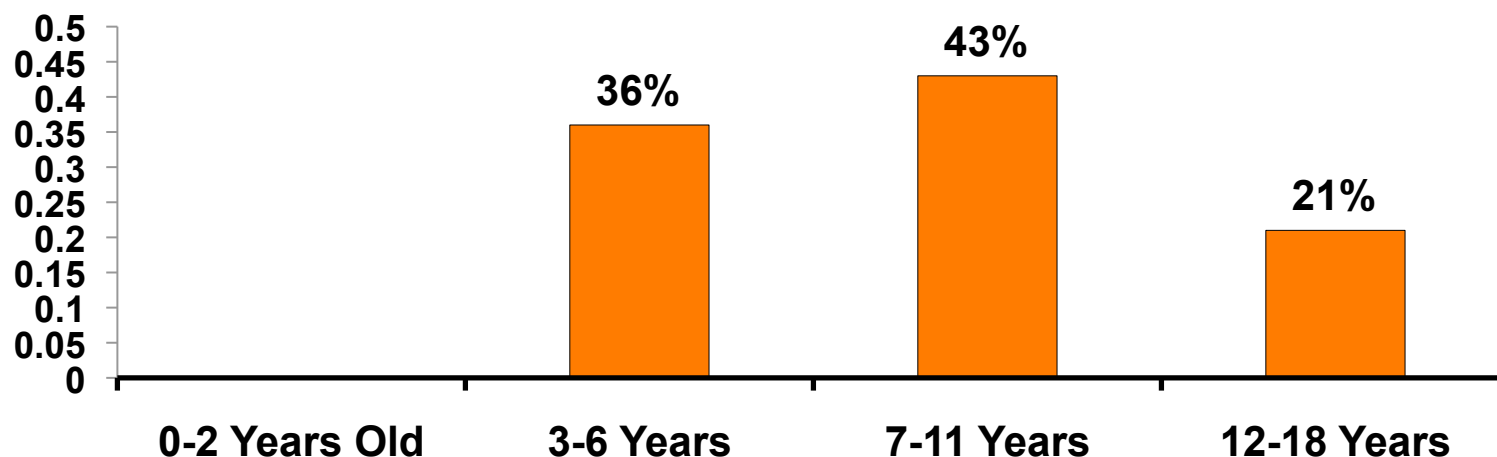
Travel Companions



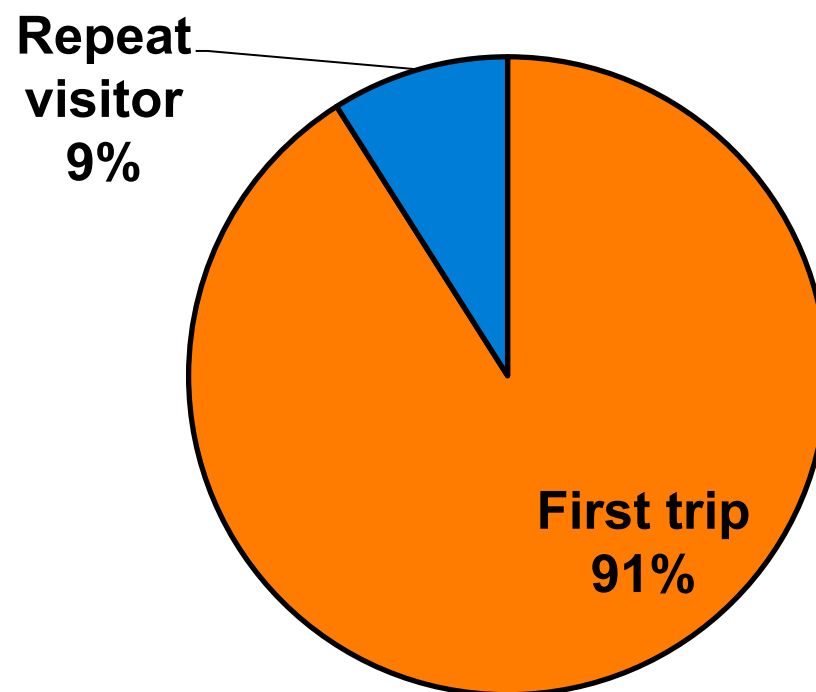
Number of Children Travel Party

N=14 total respondents traveling with children.

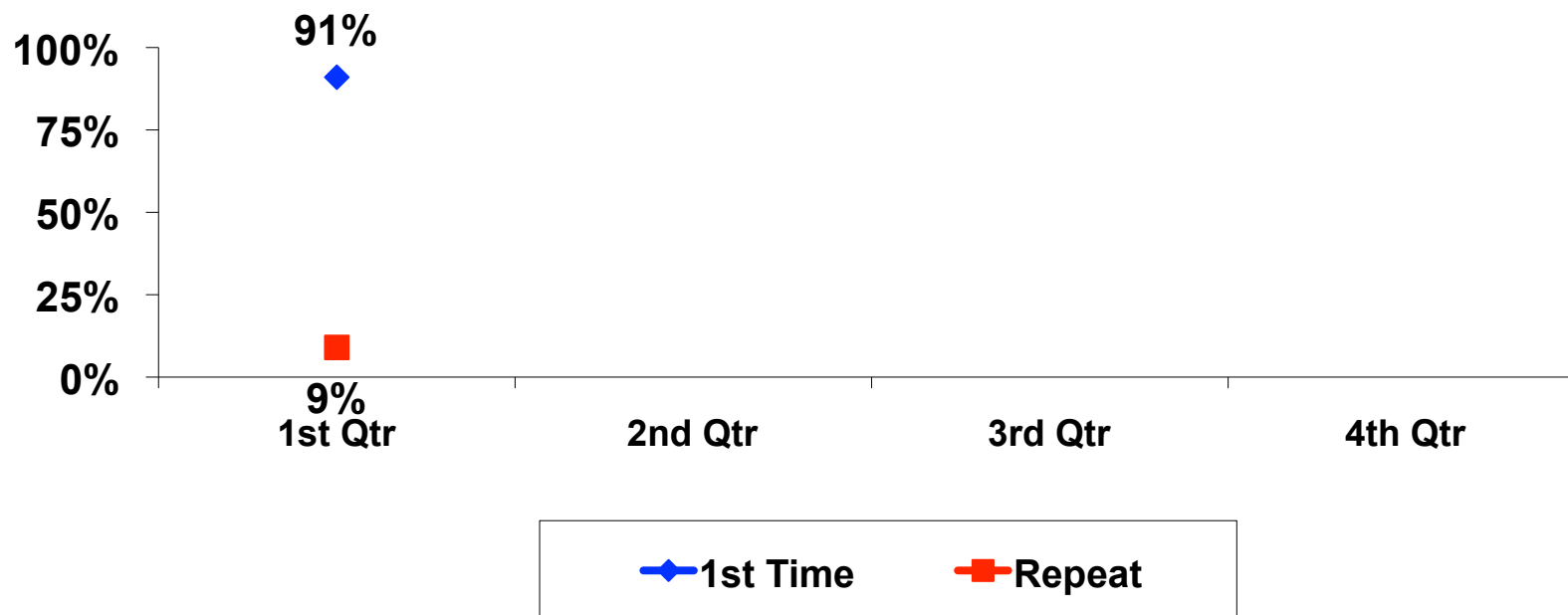
(Of those N=14 respondents, there is a total of 16 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



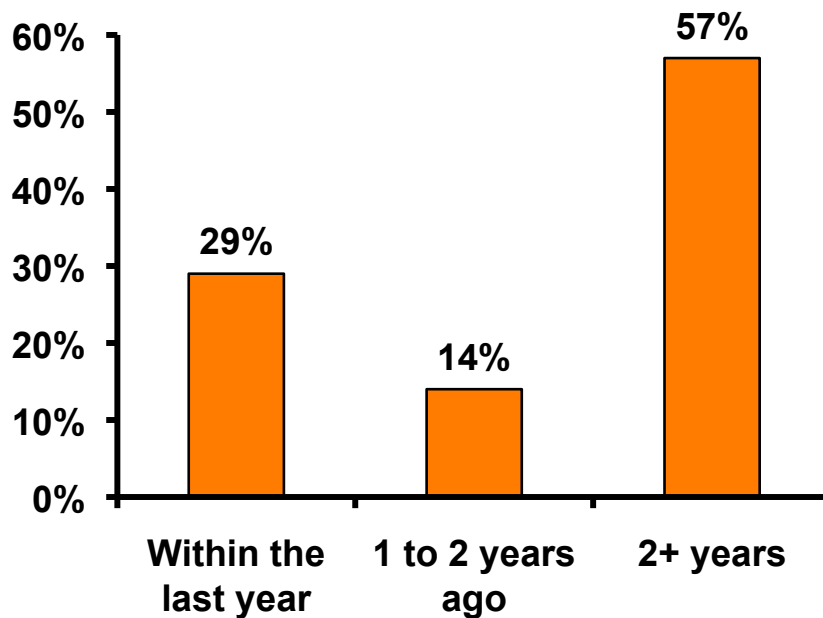
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	76	65	10
		Column N %	51%	48%	77%
	Female	Count	74	71	3
		Column N %	49%	52%	23%
AGE	Total	Count	150	136	13
	18-24	Count	14	14	
		Column N %	10%	11%	
	25-34	Count	70	65	4
		Column N %	48%	49%	31%
	35-49	Count	50	43	7
		Column N %	34%	33%	54%
	50+	Count	12	10	2
		Column N %	8%	8%	15%
	Total	Count	146	132	13

- Majority are first-time visitors to Guam.

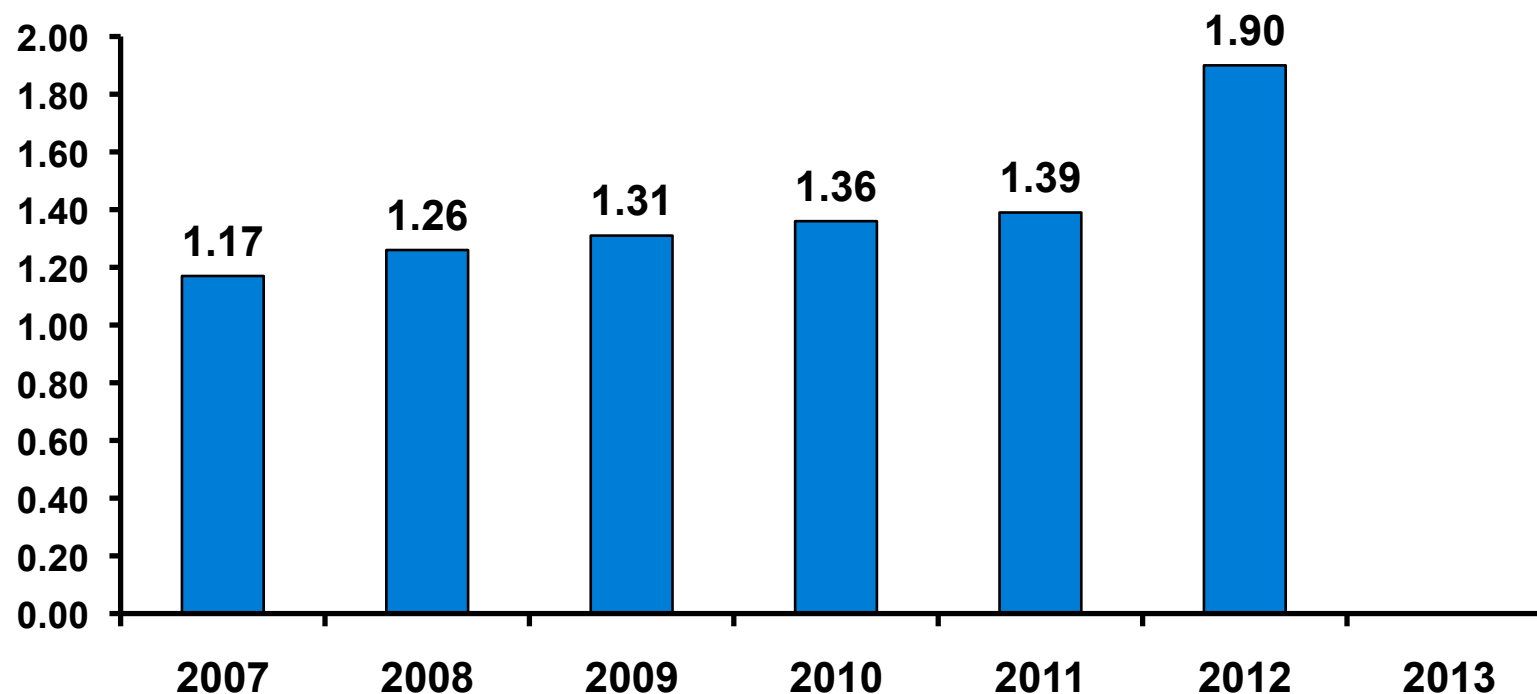
Repeat Visitors Last Trip

n = 7



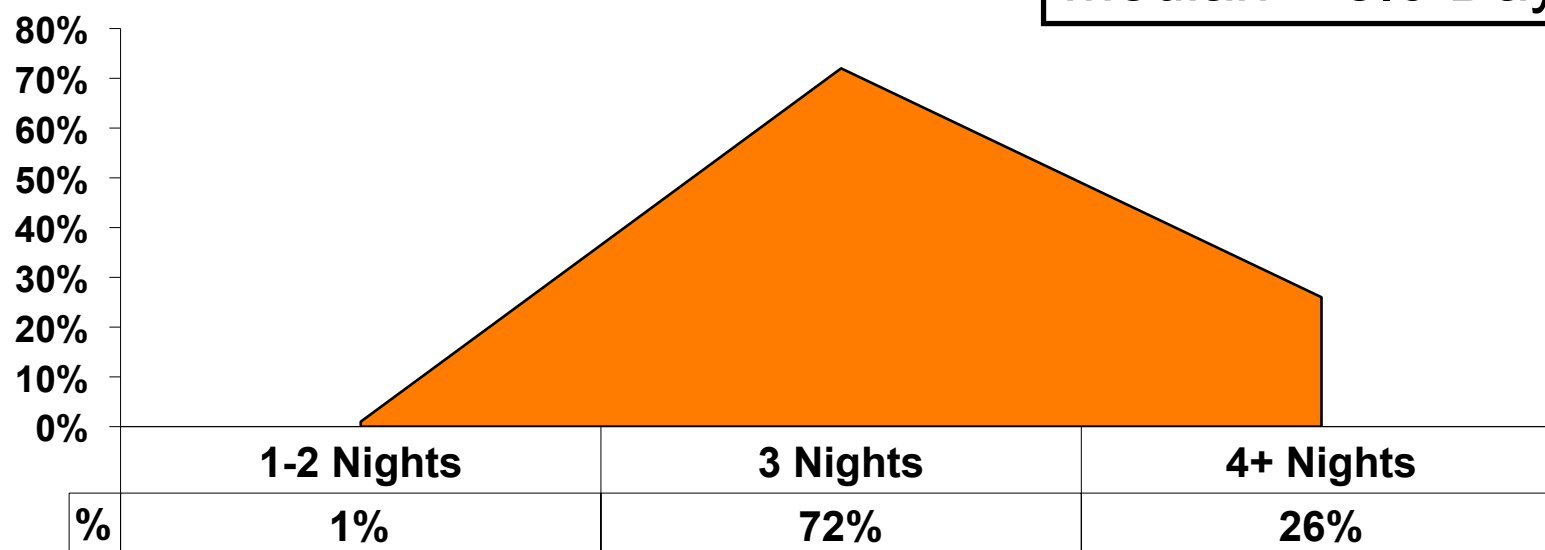
- The average repeat visitor has been to Guam 4.14 times.
- A little less than half the repeat visitors have been to Guam within the last 2 years.

Average Number Overnight Trips (2007-2013) (2 nights or more)

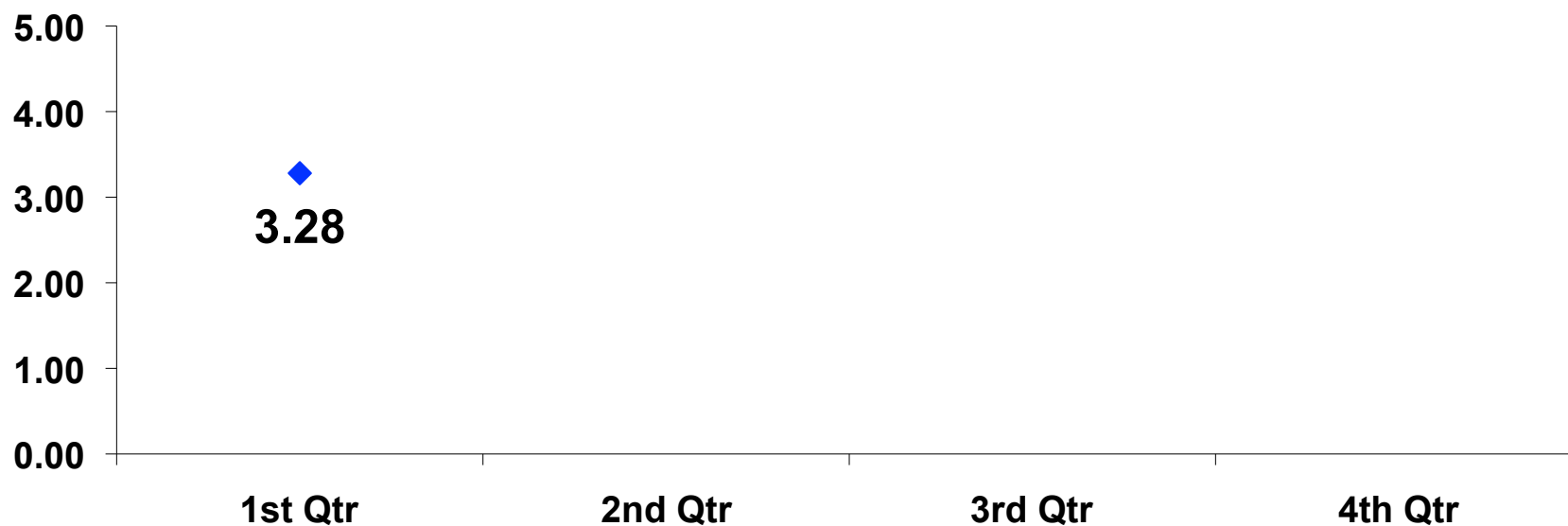


Length of Stay

Mean = 3.28 Days
Median = 3.0 Days



Average Length of Stay

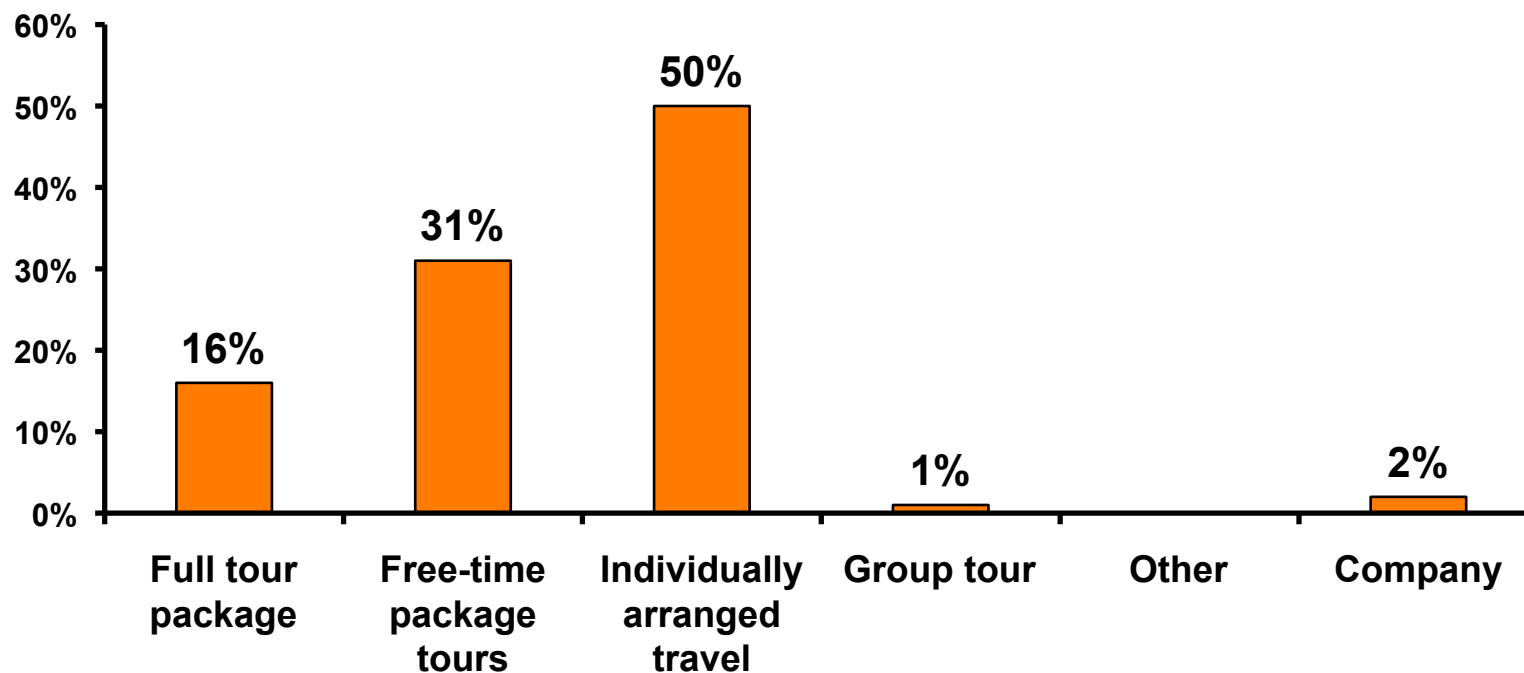


Occupation by Income

		TOTAL	Q26						
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+
Q25	Company: Office non-mgr	59%			50%	86%	77%	52%	48%
	Company: Salesperson	15%	25%			14%	3%	17%	33%
	Prof-specialist	8%					6%	14%	10%
	Skilled worker	7%	25%		50%		6%	10%	
	Freelancer	4%	50%	100%				3%	
	Student	3%					3%		
	Retired	3%						3%	5%
	Govt- Mgr/ Exec	2%					3%		5%
	Total Count	106	4	1	2	7	31	29	21

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

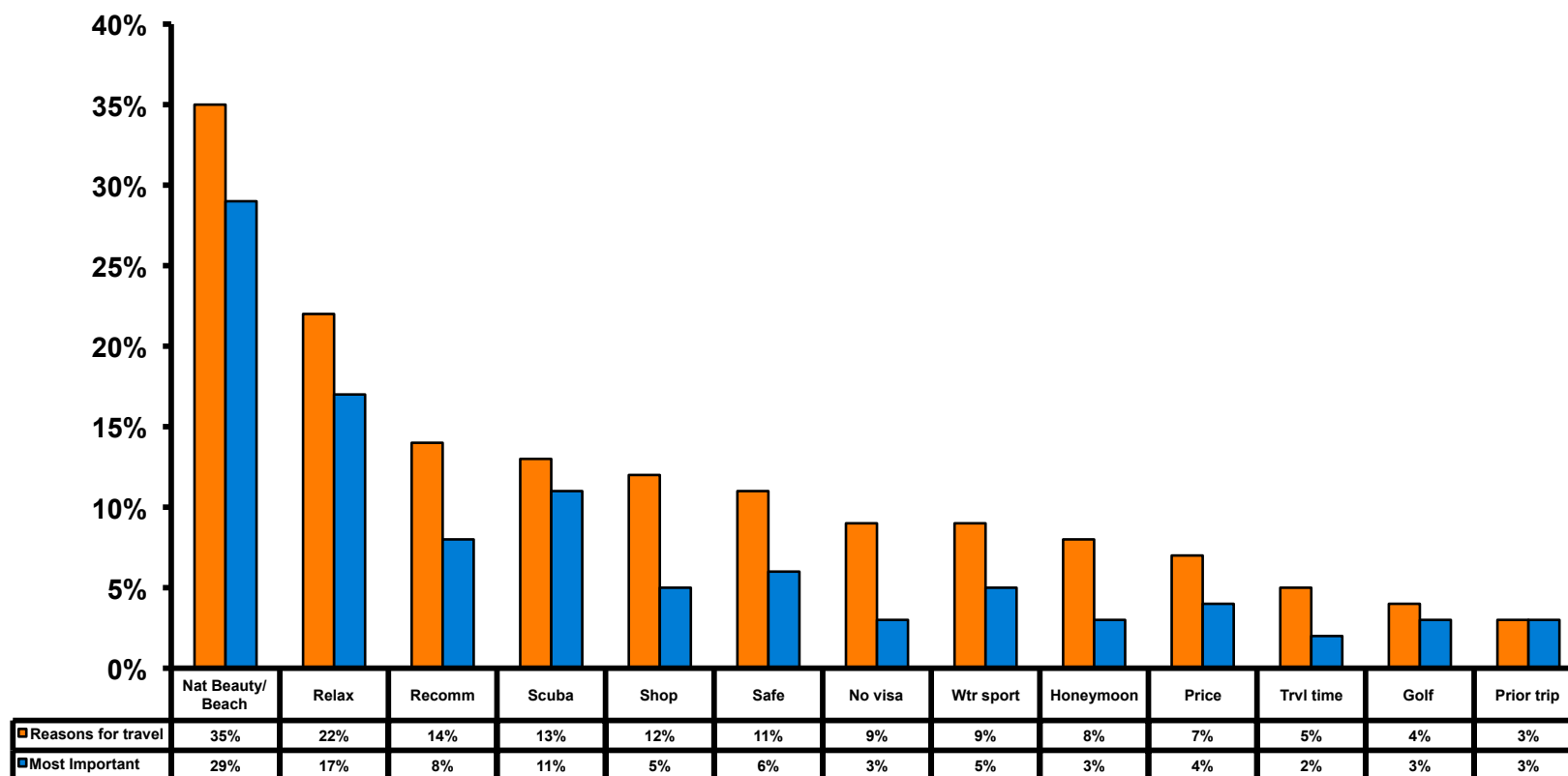


Accommodation by Income

Average length of stay: 3.28 days

		TOTAL	Q26						
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+
Q9	Hilton Guam Resort	18%				29%	16%	18%	10%
	Royal Orchid Guam	18%			50%		22%	14%	
	Sheraton Laguna Guam	14%	75%				13%	14%	14%
	PIC Club	11%				14%	9%	14%	14%
	Fiesta Resort Guam	9%	25%		50%	14%	6%	14%	14%
	Hyatt Regency Guam	9%				29%	3%	18%	14%
	Westin Resort Guam	6%		100%			13%	4%	5%
	Outrigger Guam Resort	5%					6%		14%
	Holiday Resort Guam	3%					6%		10%
	Hotel Nikko Guam	2%					3%		
	Guam Reef Hotel	2%				14%	3%		
	Onward Beach Resort	1%						4%	
	Bayview Hotel	1%							5%
	Total	Count	149	4	1	2	7	32	28
									21

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches
- Relaxation
- Scuba

are the primary reasons for visiting during this period.

Motivation by Age & Gender

		TOTAL	AGE				GENDER	
		-	18-24	25-34	35-49	50+	Male	Female
Q5A	Natural beauty	35%	36%	41%	20%	58%	32%	39%
	Relax	22%	21%	24%	24%	8%	20%	24%
	Recomm- friend/family/trvl agnt	14%	7%	17%	12%	17%	13%	15%
	Scuba	13%	21%	11%	14%	8%	14%	11%
	Shopping	12%	7%	19%	6%	8%	7%	18%
	Safe	11%	7%	10%	14%		9%	12%
	No Visa requirement	9%	7%	9%	6%	25%	8%	9%
	Water sports	9%	7%	7%	14%		8%	9%
	Honeymoon	8%	14%	14%			7%	9%
	Price	7%	7%	6%	8%	8%	5%	8%
	Short travel time	5%	7%	3%	6%		4%	5%
	Golf	4%		4%	4%	8%	5%	3%
	Previous trip	3%		1%	8%		7%	
	Company/ Business Trip	3%		4%	2%		4%	1%
	Pleasure	1%		1%	2%			3%
	Organized sports	1%		1%			1%	
	Married/ Attn wedding	1%				8%		1%
	Company Sponsored	1%			2%			1%
	Total Count	150	14	70	50	12	76	74

Motivation by Income

		TOTAL	Q26						
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+
Q5A	Natural beauty	35%	50%	100%	100%	43%	31%	38%	38%
	Relax	22%	50%		50%	29%	25%	21%	24%
	Recomm- friend/family/trvl agnt	14%	75%			29%	16%	14%	19%
	Scuba	13%				14%	13%	10%	14%
	Shopping	12%	50%			14%	13%	10%	24%
	Safe	11%	25%				9%	21%	5%
	No Visa requirement	9%	25%		50%		9%	14%	5%
	Water sports	9%					6%	17%	
	Honeymoon	8%	25%			14%	9%	14%	
	Price	7%					6%	14%	5%
	Short travel time	5%			100%		3%		10%
	Golf	4%						14%	5%
	Previous trip	3%					3%	3%	5%
	Company/ Business Trip	3%	25%					3%	
	Pleasure	1%					3%	3%	
	Organized sports	1%	25%						
	Married/ Attn wedding	1%						3%	
	Company Sponsored	1%						3%	
	Total Count	150	4	1	2	7	32	29	21

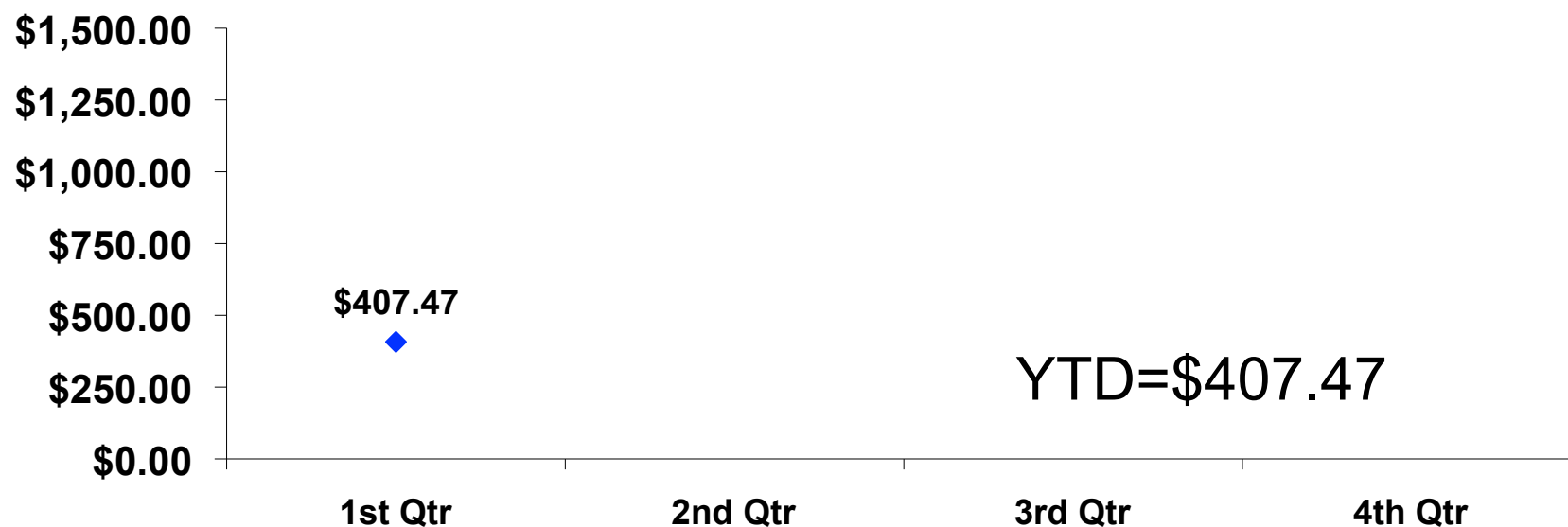
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

TWD29.0120/US\$1

- \$667.08 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$4,109 = maximum (highest amount recorded for the entire sample)
- \$407.47 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

TWD29.0120=\$1

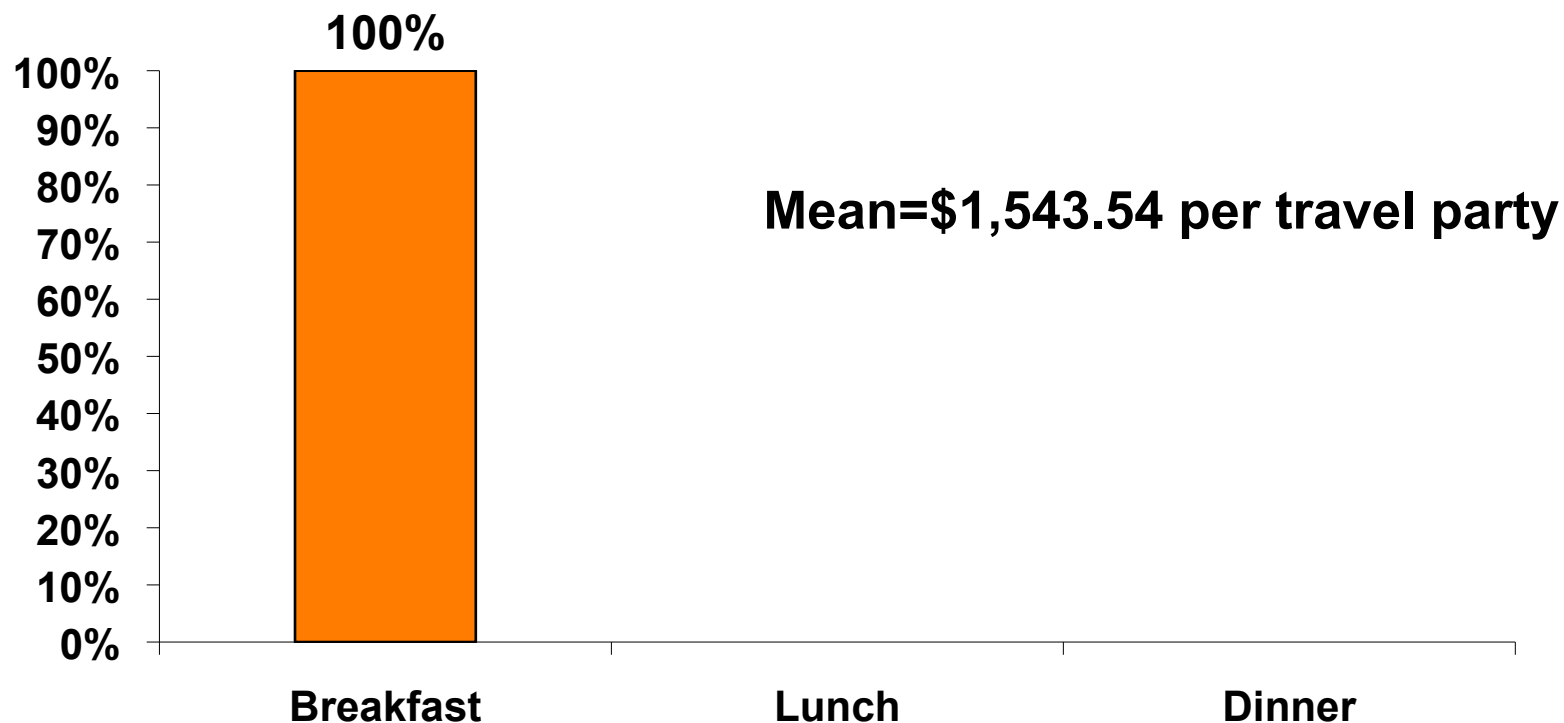
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$878.26
Air & Accommodation w/ daily meal package	\$1,543.54
Air only	\$1,413.21
Accommodation only	\$2,334.67
Accommodation w/ daily meal only	\$965.12
Food & Beverages in Hotel	\$-
Ground transportation- Taiwan	\$65.26
Ground transportation- Guam	\$37.92
Optional tours/ activities	\$408.21
Other expenses	\$827.24
Total Prepaid	\$667.08

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

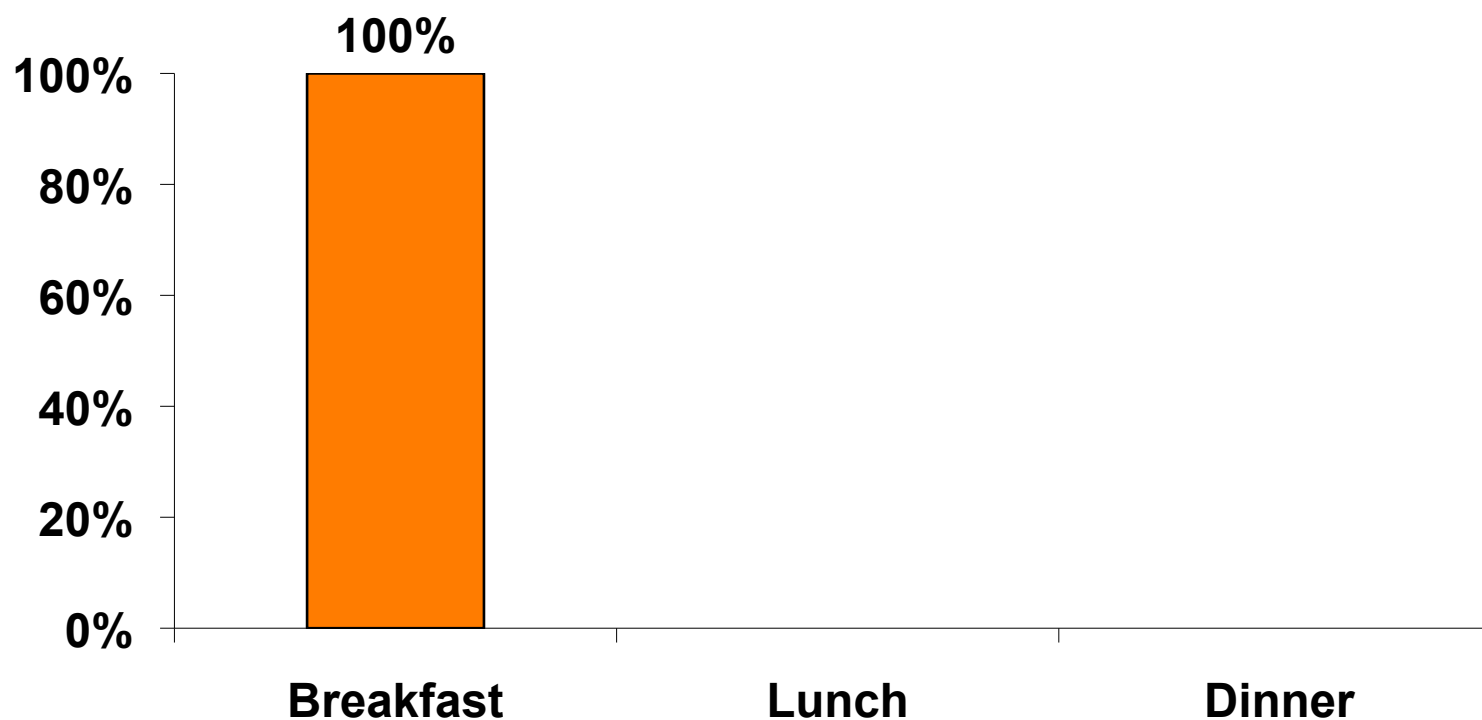
n=1



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

n=1

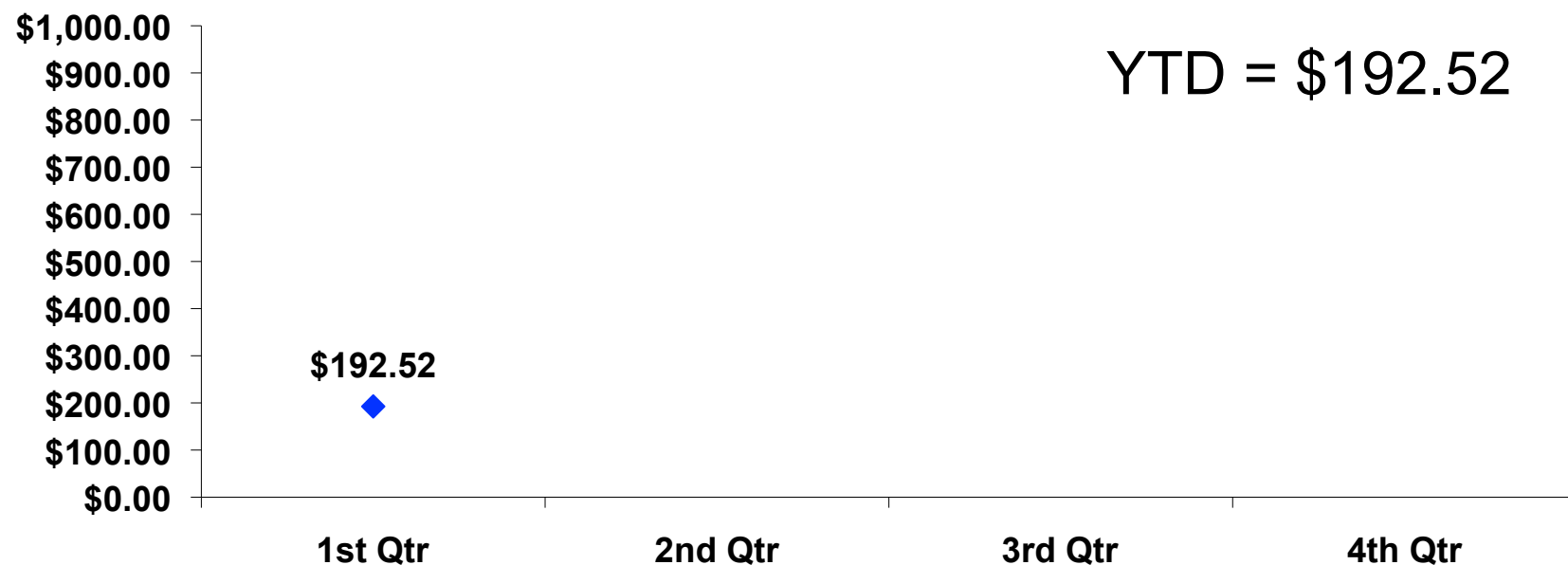


Mean=\$965.12 per travel party

On-Island Expenditures

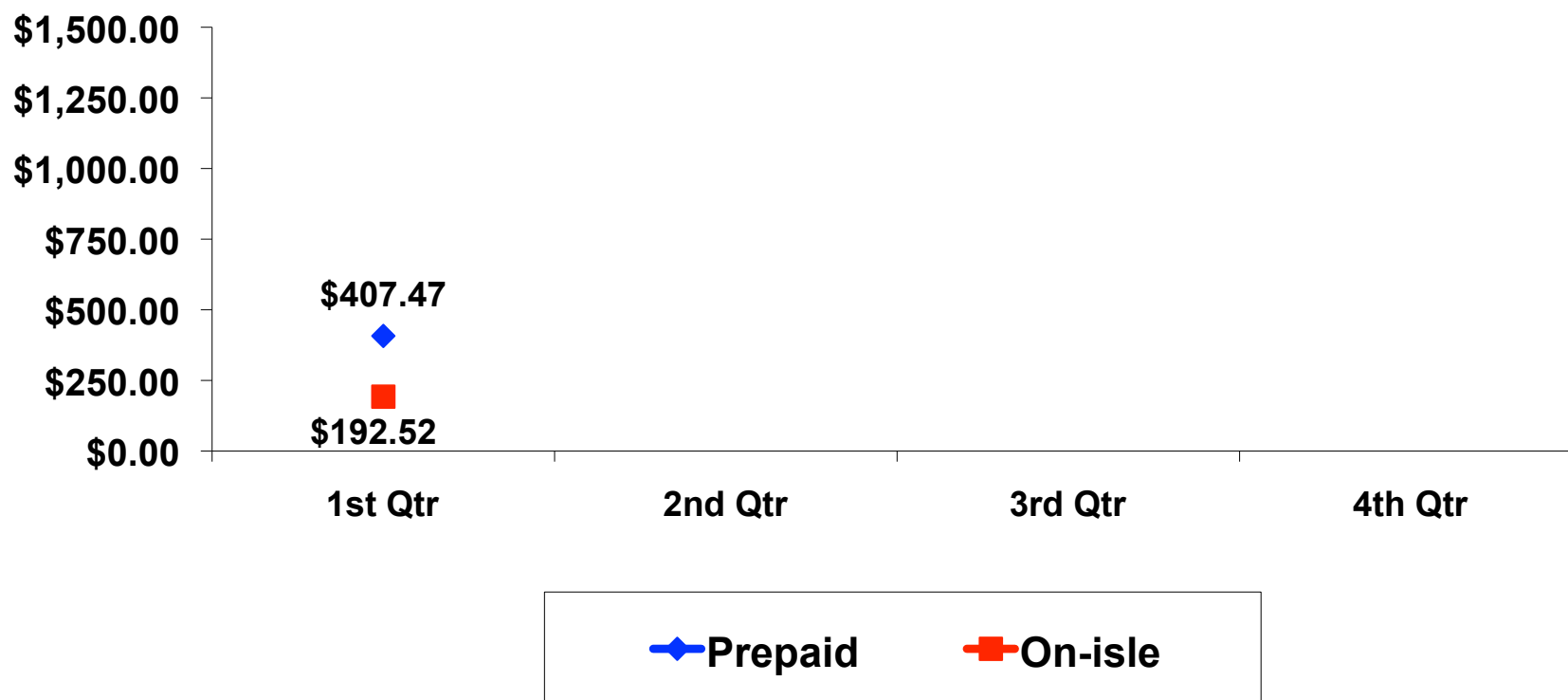
- \$313.67 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,500 = Maximum (highest amount recorded for the entire sample)
- \$192.52 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person



Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$407.47 On-Island YTD = \$192.52



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
		-	Male	Female	Male				Female			
					AGE				AGE			
					18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$192.52	\$176.63	\$208.83	\$212.60	\$218.30	\$102.12	\$207.19	\$115.50	\$233.37	\$194.03	\$316.75
	Median	\$0	\$0	\$0	\$0	\$158	\$0	\$4	\$81	\$0	\$0	\$334
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$2,500	\$1,026	\$2,500	\$1,026	\$1,000	\$625	\$950	\$300	\$1,100	\$2,500	\$600

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$28.39	\$38.82	\$17.68	\$18.43	\$11.76	\$21.54	\$175.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$7.59	\$5.96	\$9.26	\$4.29	\$11.16	\$5.44	\$2.08
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$9.53	\$6.32	\$12.84	\$4.29	\$11.86	\$9.60	\$5.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$52.46	\$41.17	\$64.05	\$95.00	\$36.70	\$56.60	\$78.33
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$71.34	\$76.13	\$66.42	\$79.86	\$82.14	\$61.66	\$62.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- OTHER	Mean	\$33.83	\$41.41	\$26.05	\$0.29	\$27.73	\$53.00	\$40.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TRANS	Mean	\$4.67	\$4.17	\$5.18	\$0.00	\$7.36	\$2.96	\$3.08
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$104.53	\$104.54	\$104.51	\$51.43	\$173.70	\$35.20	\$86.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$313.67	\$318.51	\$308.69	\$253.57	\$365.26	\$246.00	\$452.67
	Median	\$0	\$0	\$0	\$0	\$86	\$0	\$216

On-Island Expenditures

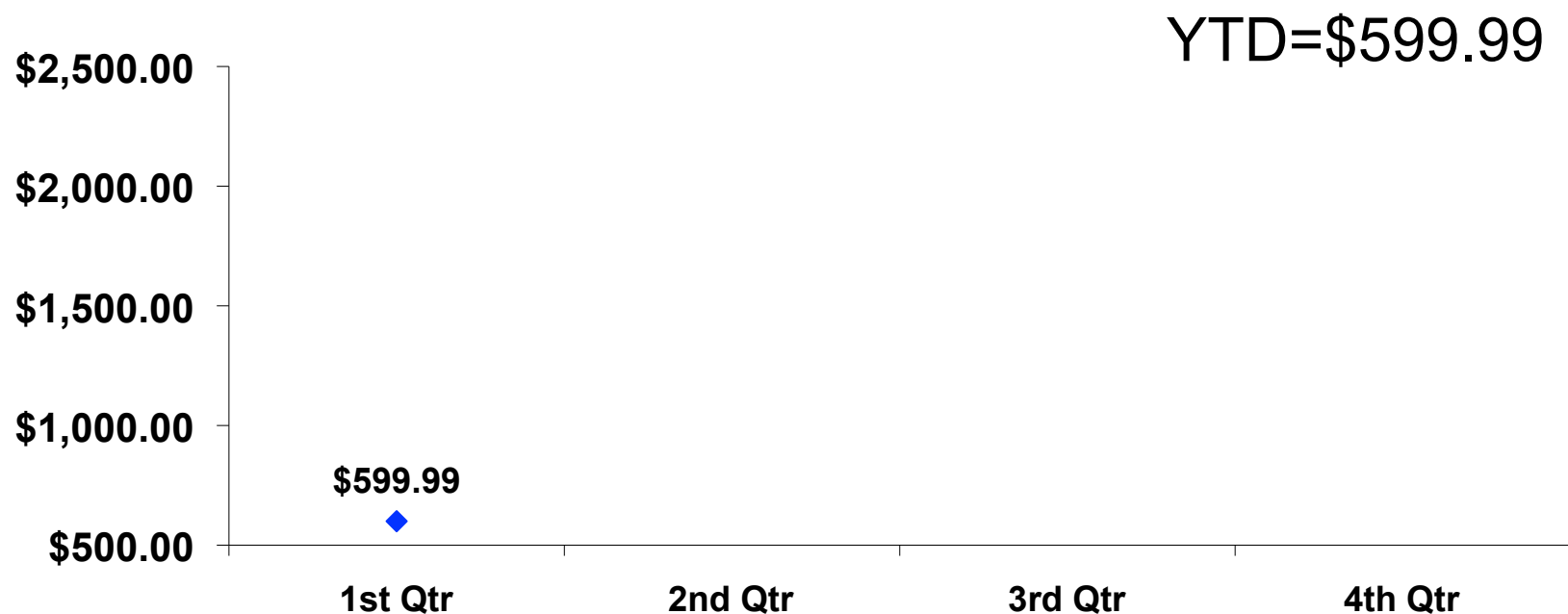
First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$28.39	\$16.24	\$157.69
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$7.59	\$7.49	\$5.38
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$9.53	\$10.37	\$1.54
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$52.46	\$56.24	\$16.92
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$71.34	\$71.33	\$57.69
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$33.83	\$18.57	\$173.08
	Median	\$0	\$0	\$0
TRANS	Mean	\$4.67	\$5.04	\$1.15
	Median	\$0	\$0	\$0
OTHER	Mean	\$104.53	\$113.08	\$23.08
	Median	\$0	\$0	\$0
TOTAL	Mean	\$313.67	\$298.35	\$451.92
	Median	\$0	\$0	\$0

Total Expenditures Per Person (Prepaid & On-Island)

- \$599.99 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,362 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

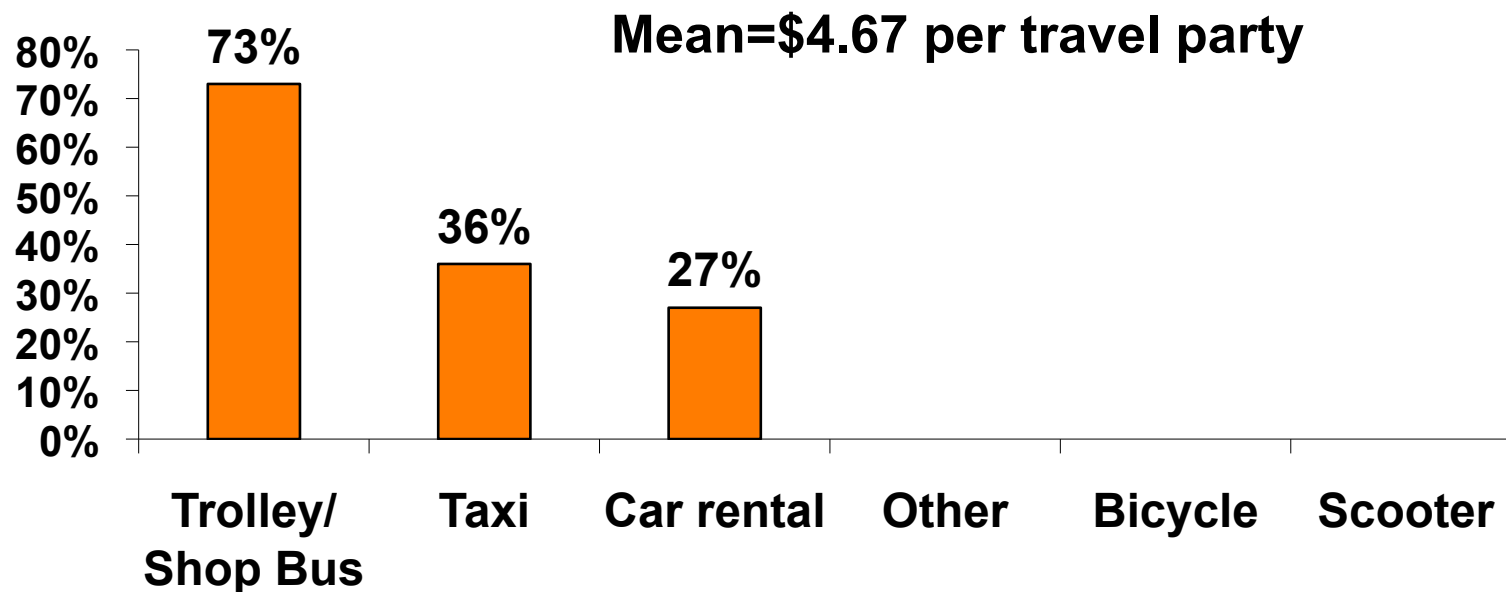


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$28.39
Food & beverage in fast food restaurant/ convenience store	\$7.59
Food & beverage at restaurants or drinking establishments outside a hotel	\$9.53
Optional tours and activities	\$52.46
Gifts/ souvenirs for yourself/companions	\$71.34
Gifts/ souvenirs for friends/family at home	\$33.83
Local transportation	\$4.67
Other expenses not covered	\$104.53
Average Total	\$313.67

Local Transportation

n=11



Guam Airport Expenditures

- \$8.49 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$400 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

	MEAN \$
Food & Beverages	\$1.06
Gifts/Souvenirs Self	\$5.52
Gifts/Souvenirs Others	\$1.91
Total	\$8.49

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

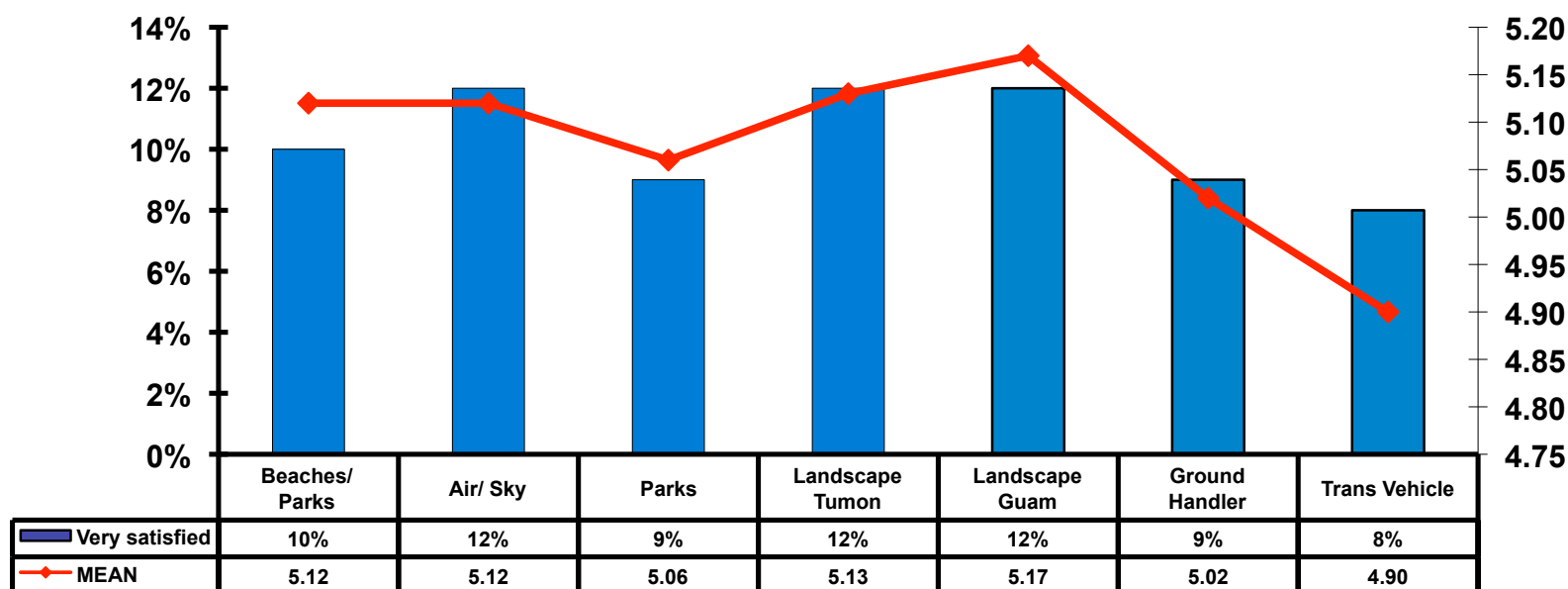
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

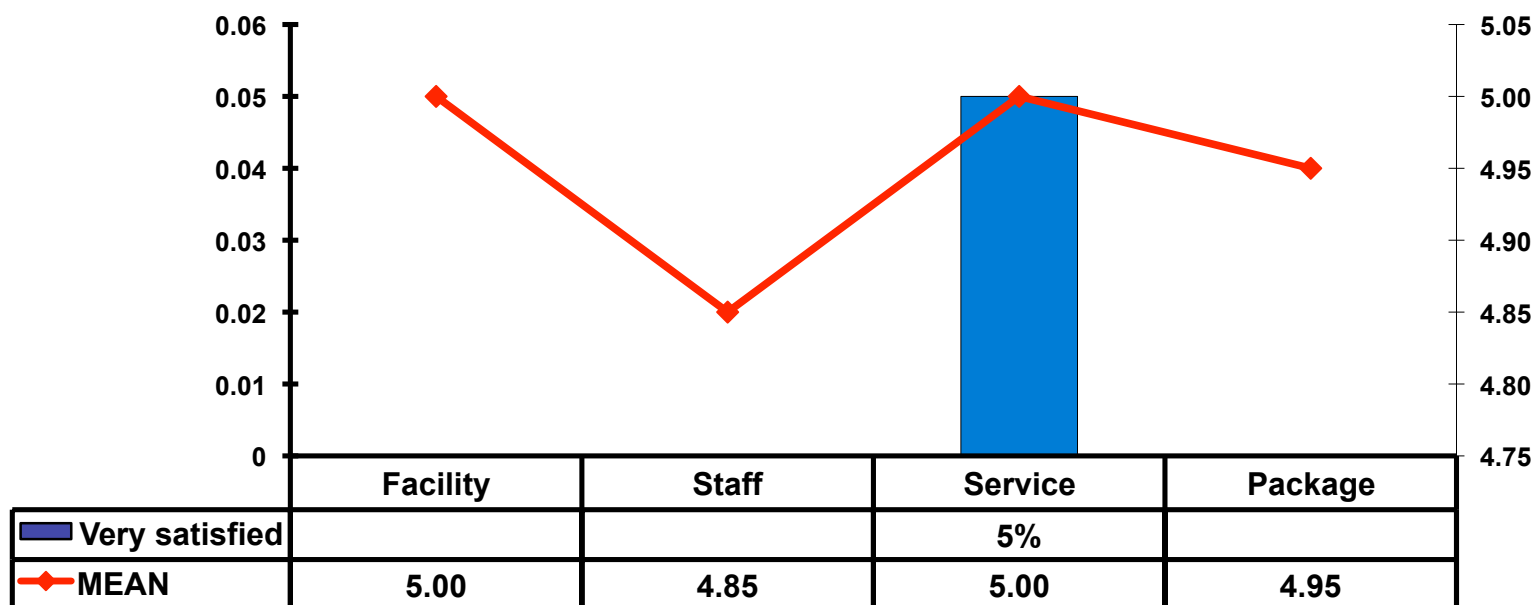
7=Very Satisfied/1=Very Dissatisfied



Wedding Satisfaction Scores

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

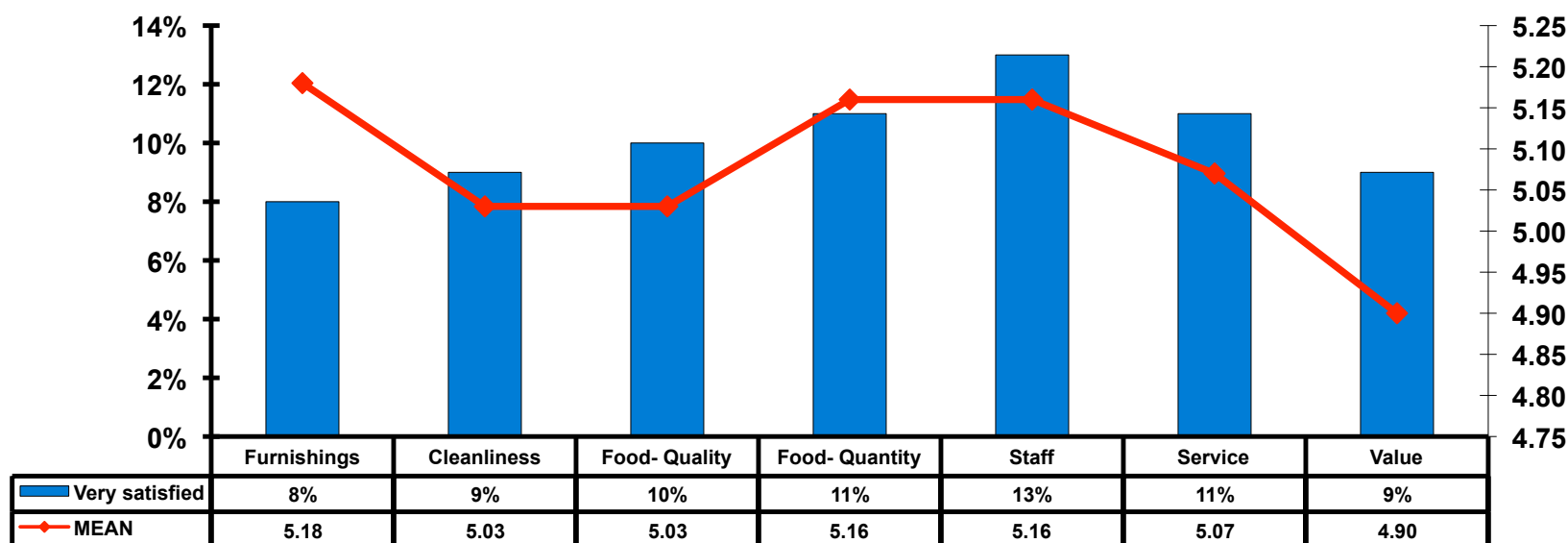
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

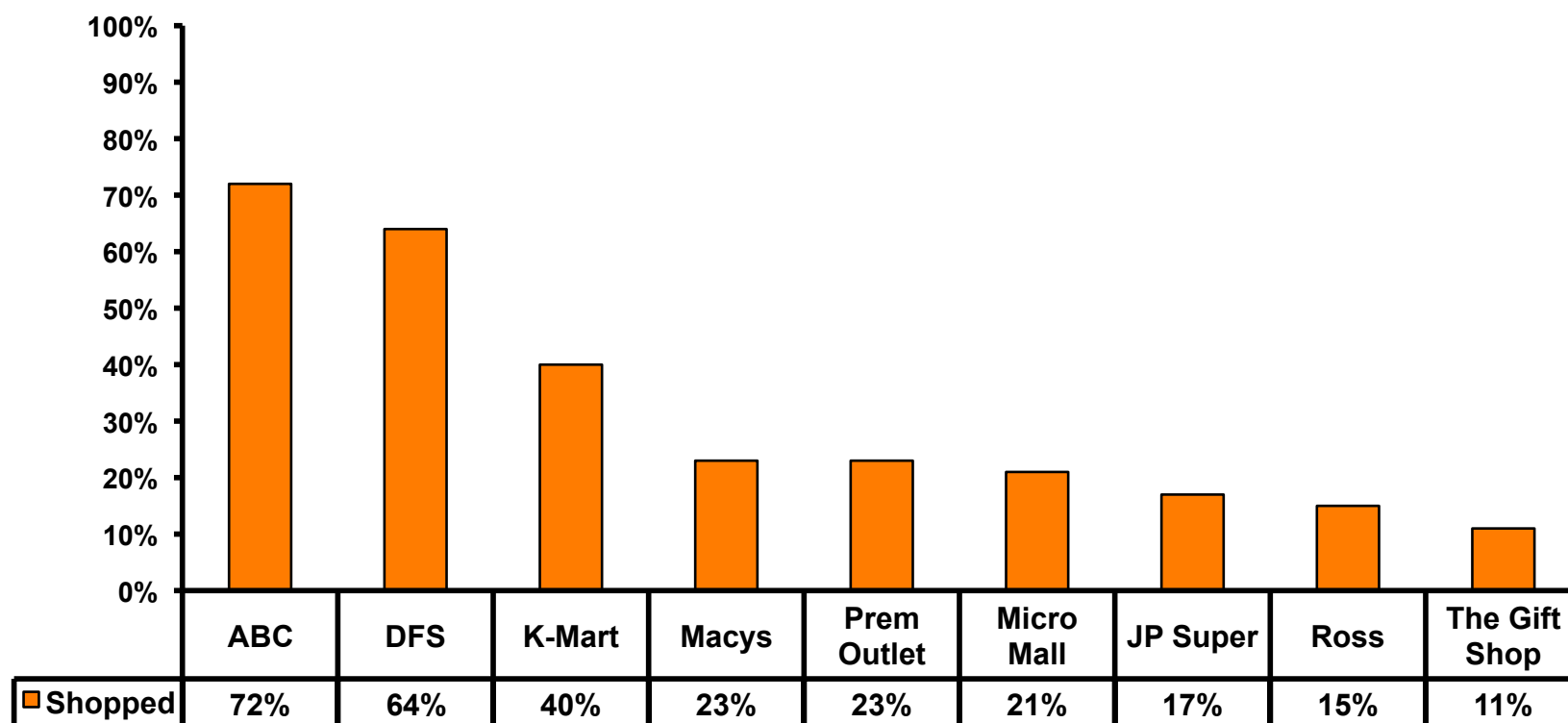
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



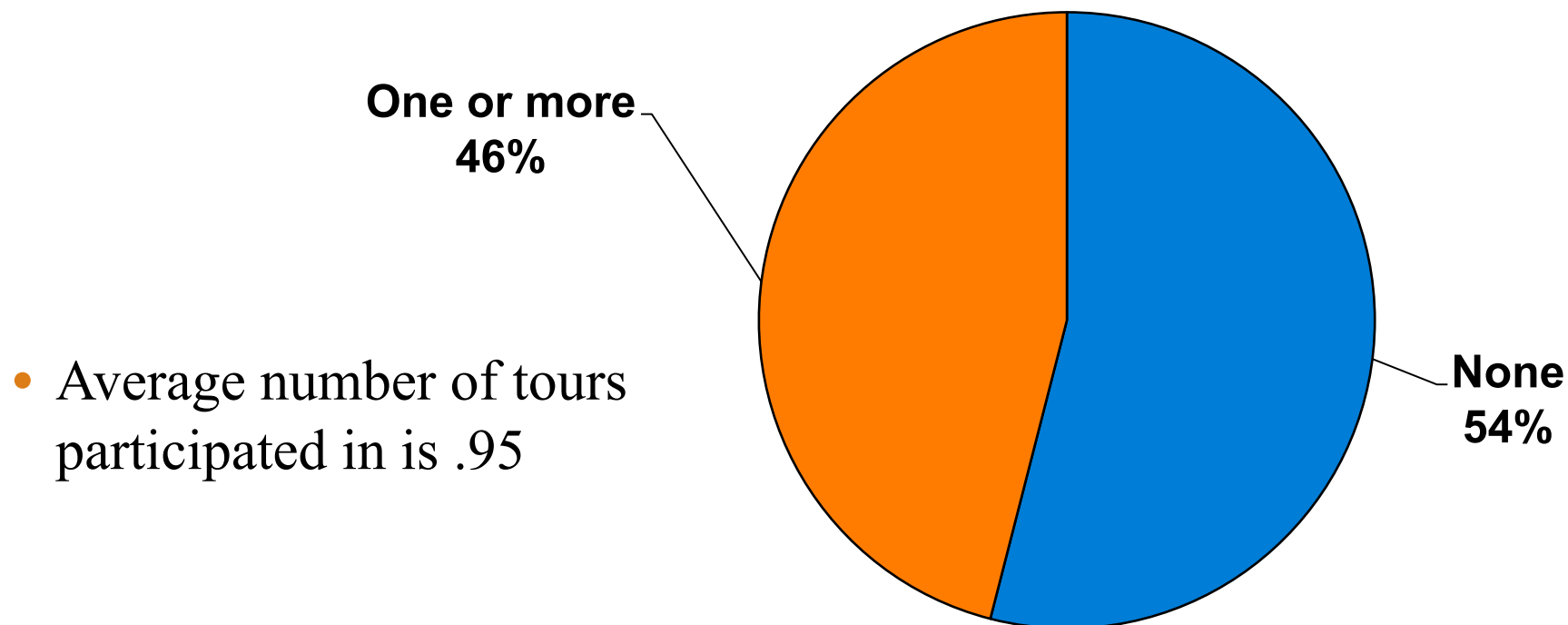
Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

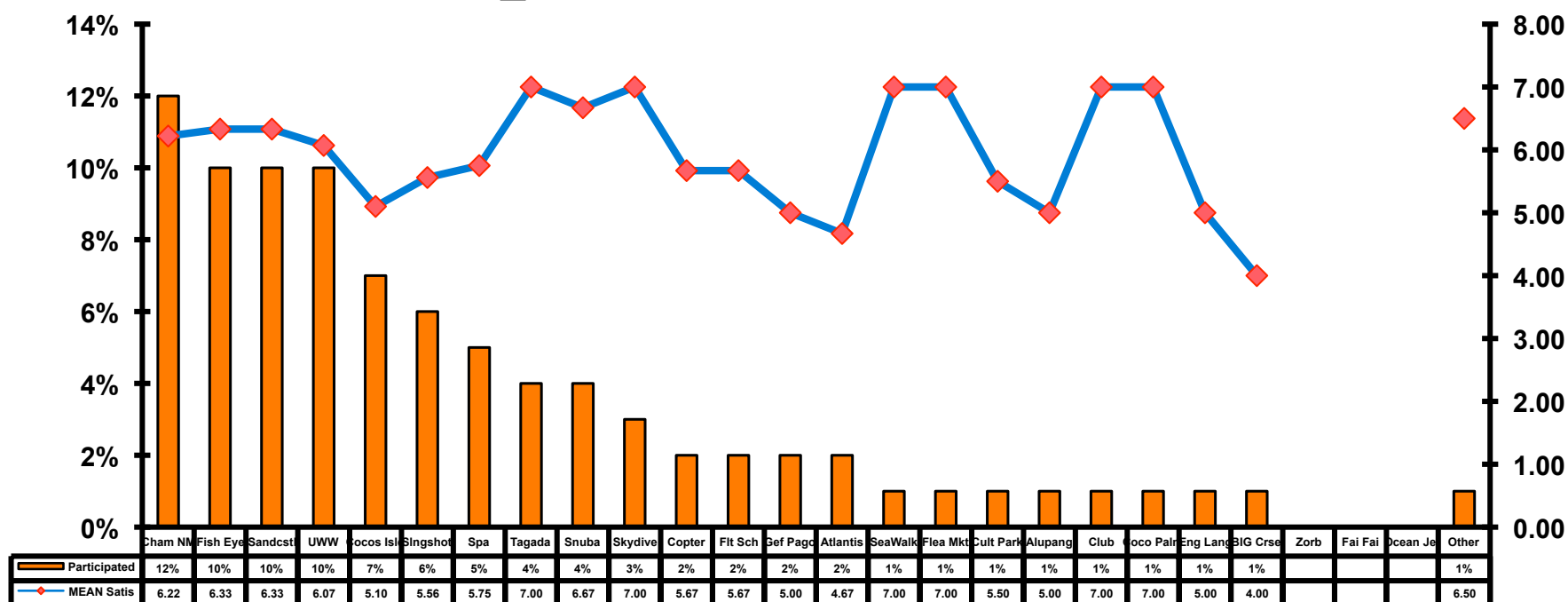
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 24%	Score of 6 to 7 = 23%
Score of 4 to 5 = 75%	Score of 4 to 5 = 75%
Score 1 to 3 = 2%	Score 1 to 3 = 3%
MEAN = 4.98	MEAN = 4.98

Optional Tour Participation



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 = 29%	Score of 6 to 7 = 28%
Score of 4 to 5 = 70%	Score of 4 to 5 = 72%
Score 1 to 3 = 1%	Score 1 to 3 = 1%
MEAN = 5.16	MEAN = 5.12

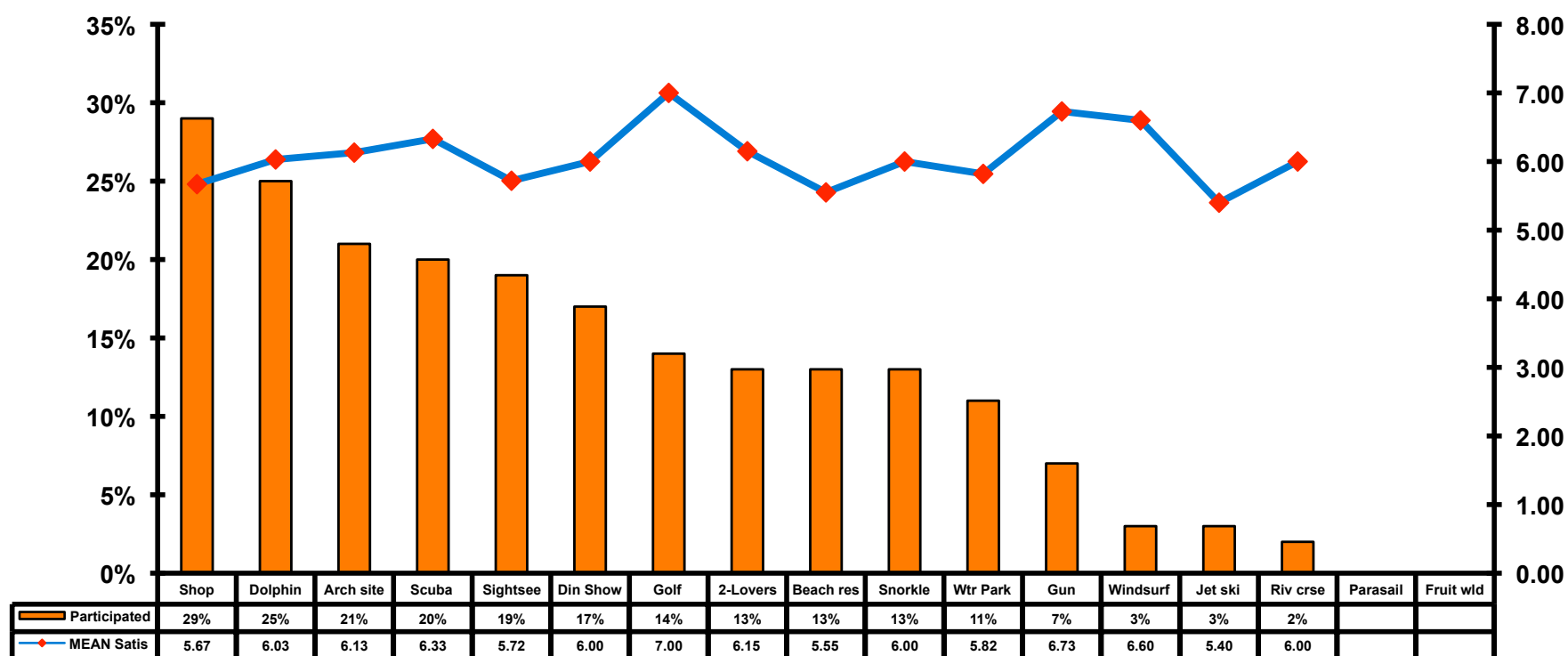
Night Tours Satisfaction

7pt Rating Scale

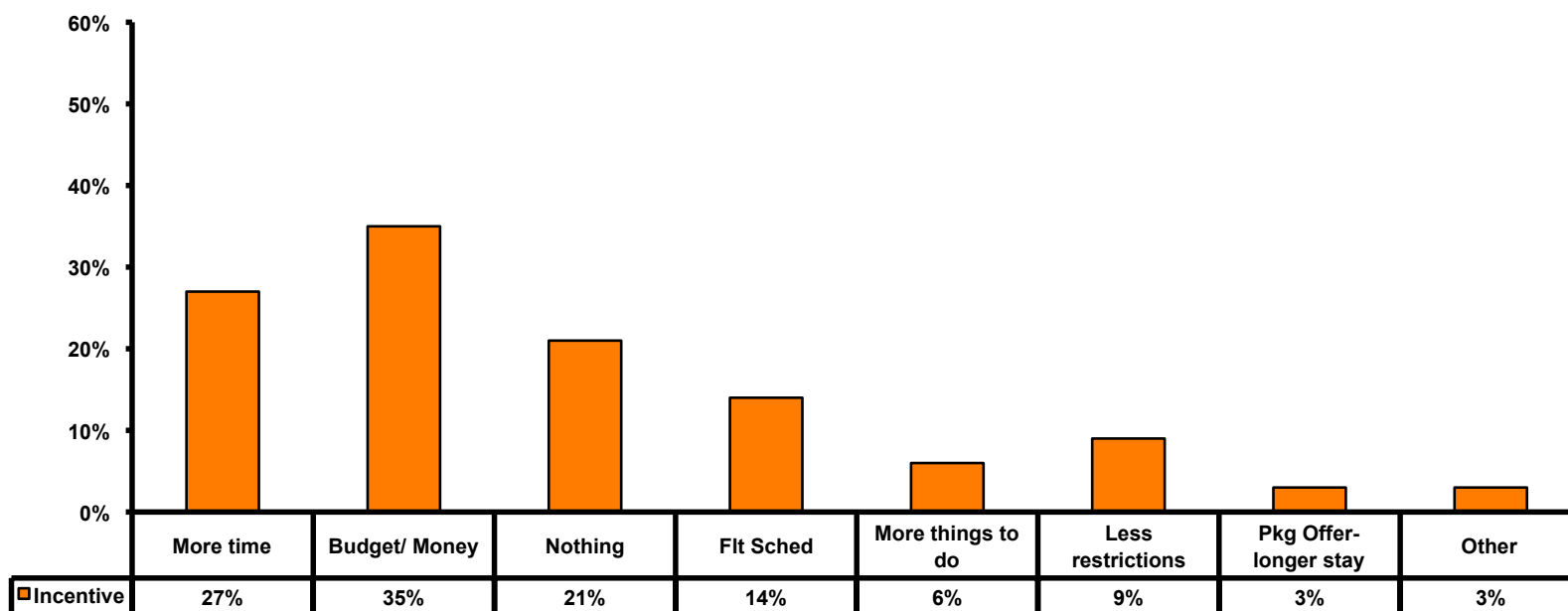
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 23%	Score of 6 to 7 = 21%
Score of 4 to 5 = 76%	Score of 4 to 5 = 79%
Score 1 to 3 = 1%	Score 1 to 3 = 0%
MEAN = 5.04	MEAN = 4.97

Satisfaction with Other Activities



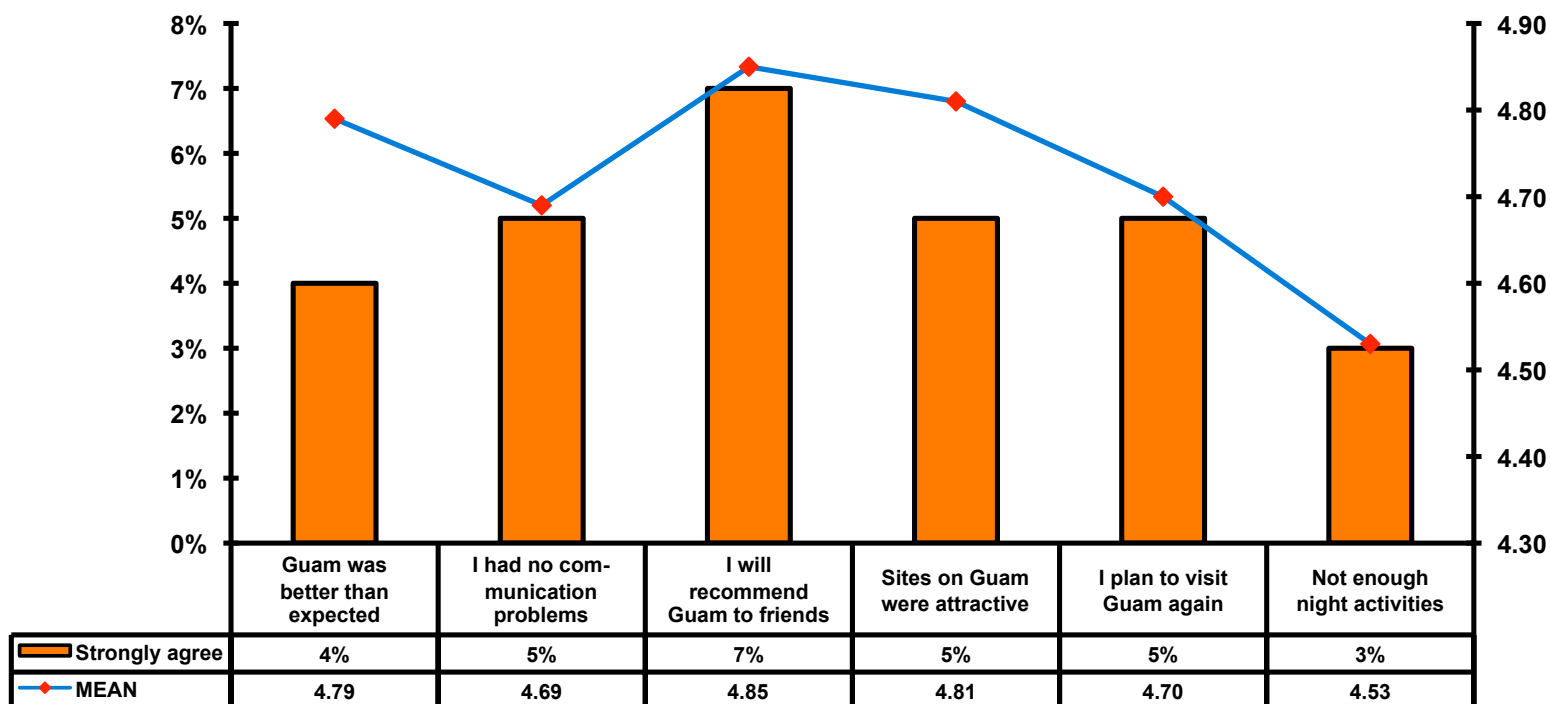
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

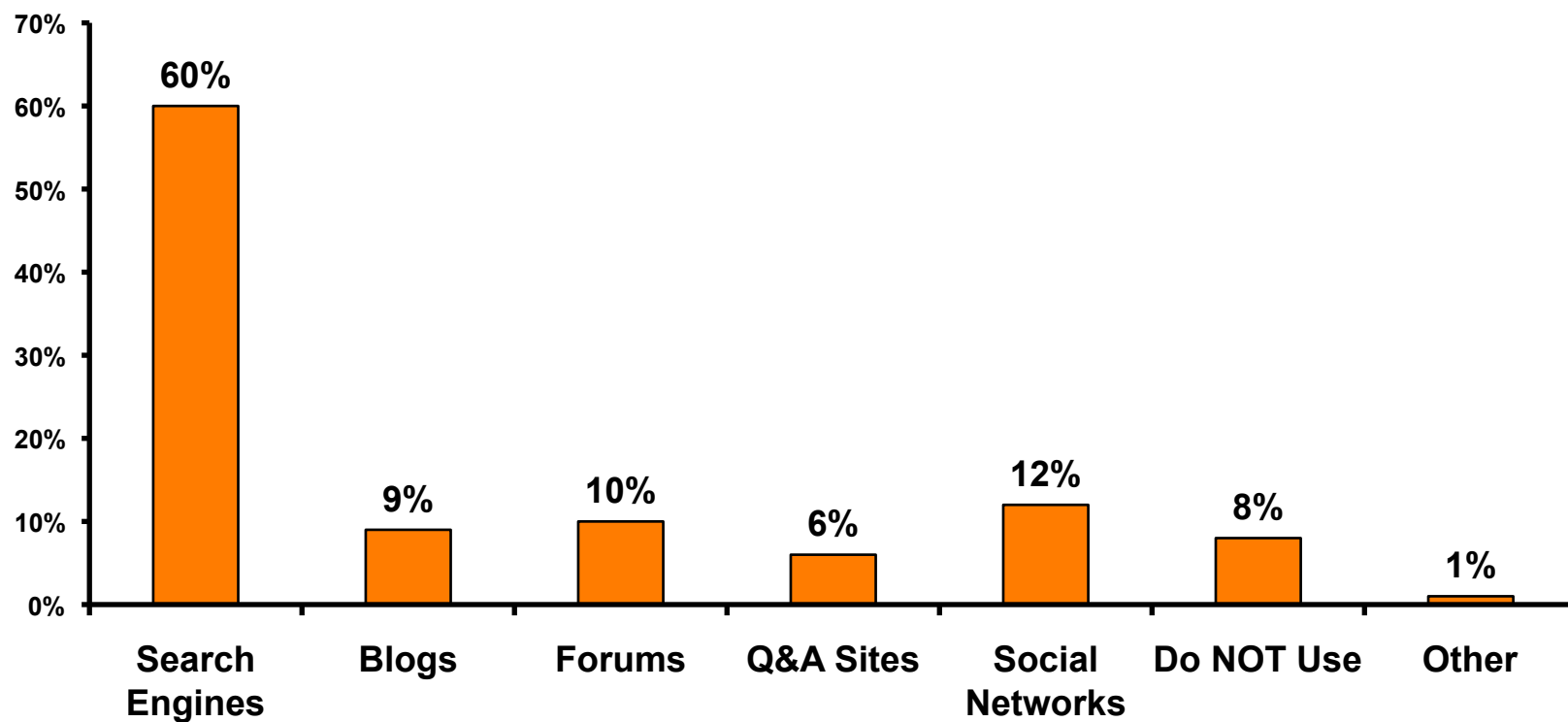
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



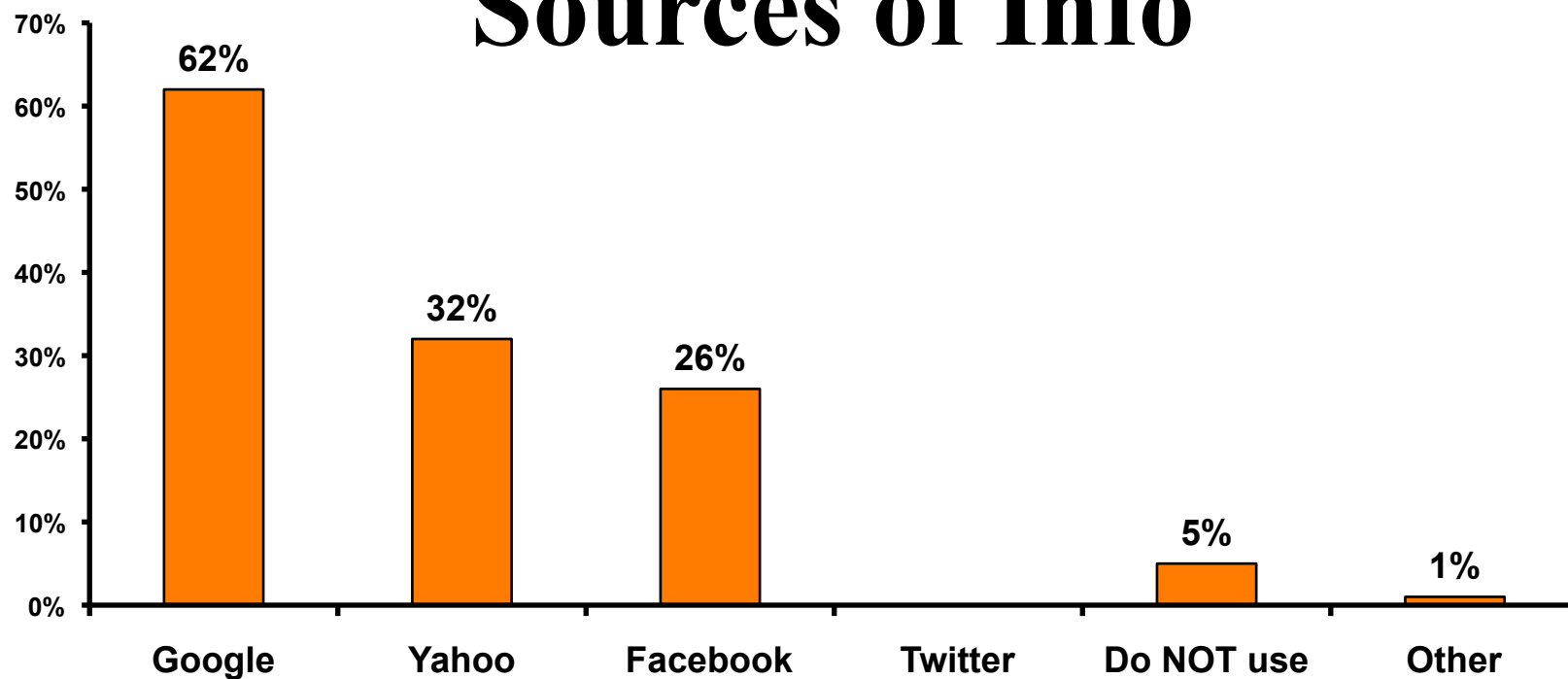
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

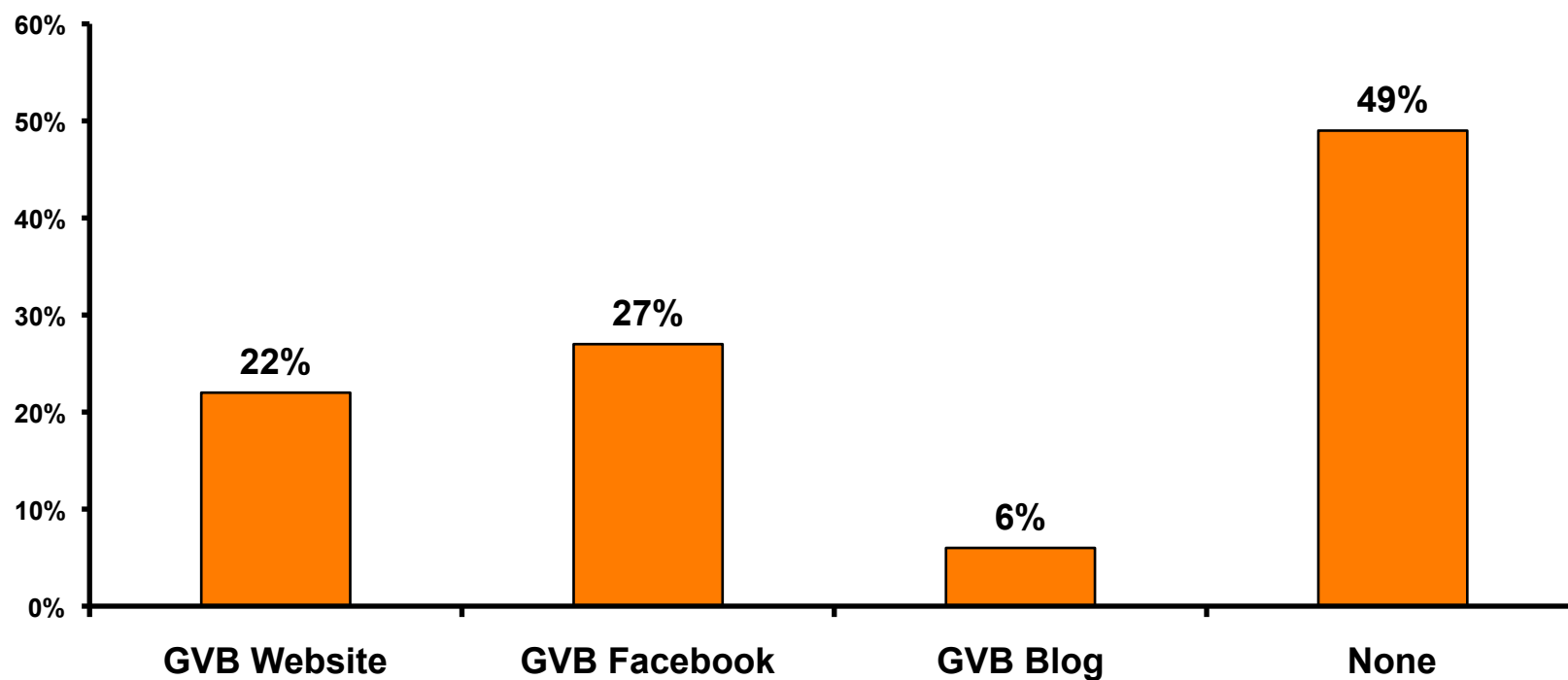


Internet- Things To Do

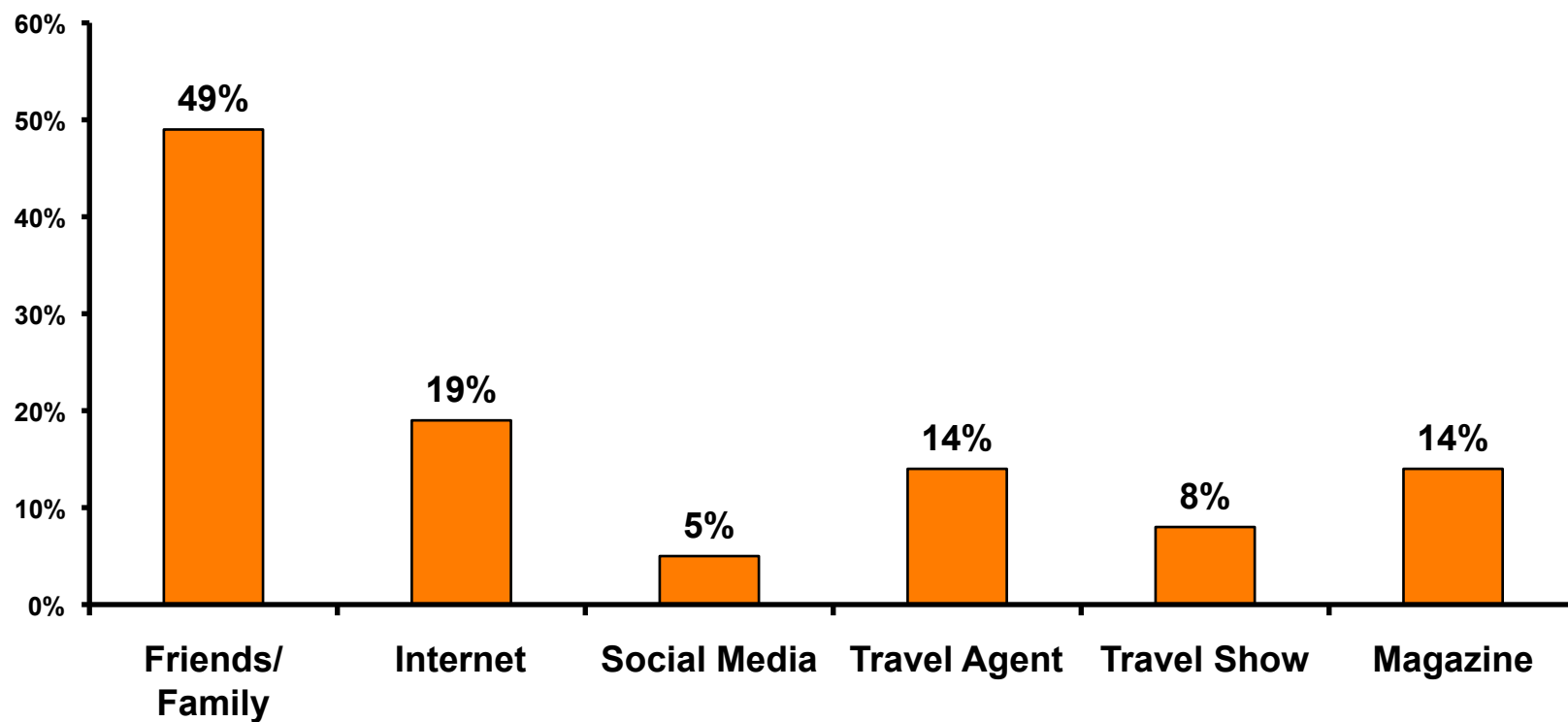
Sources of Info



Internet- GVB Sources

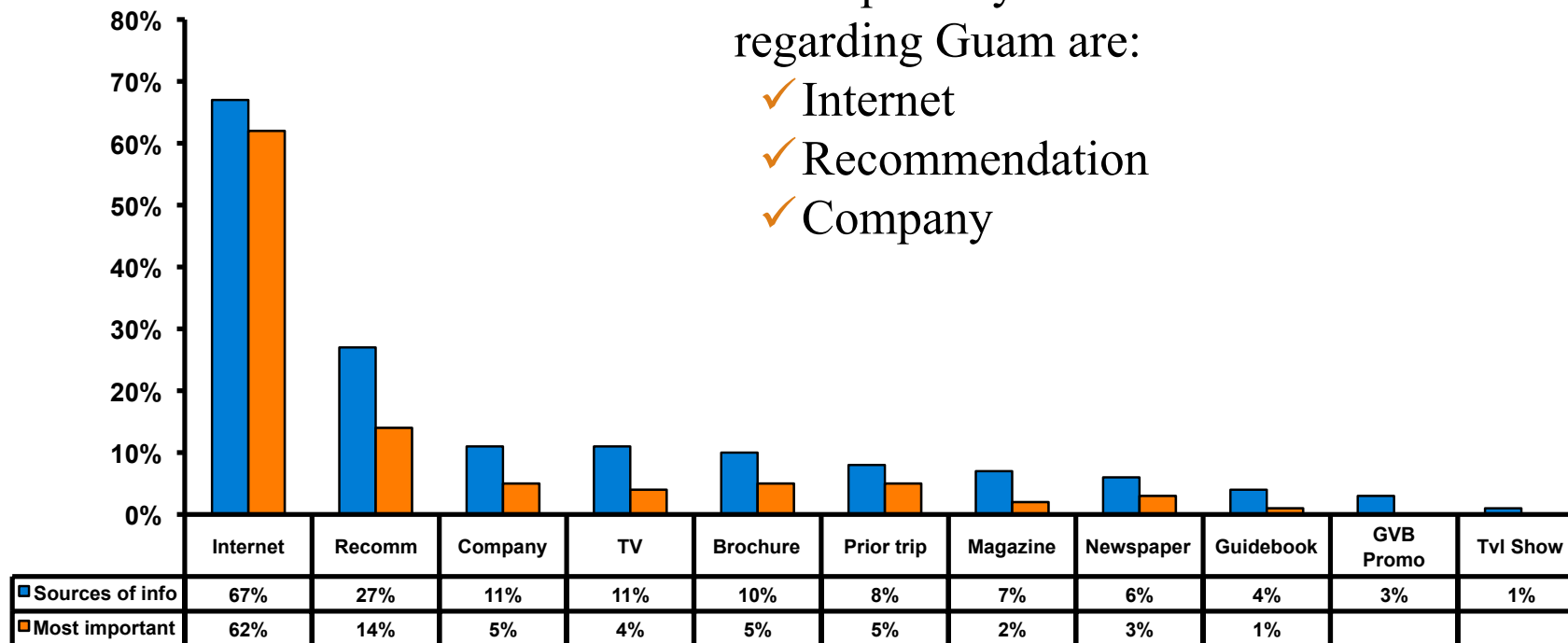


Travel Motivation- Info Sources



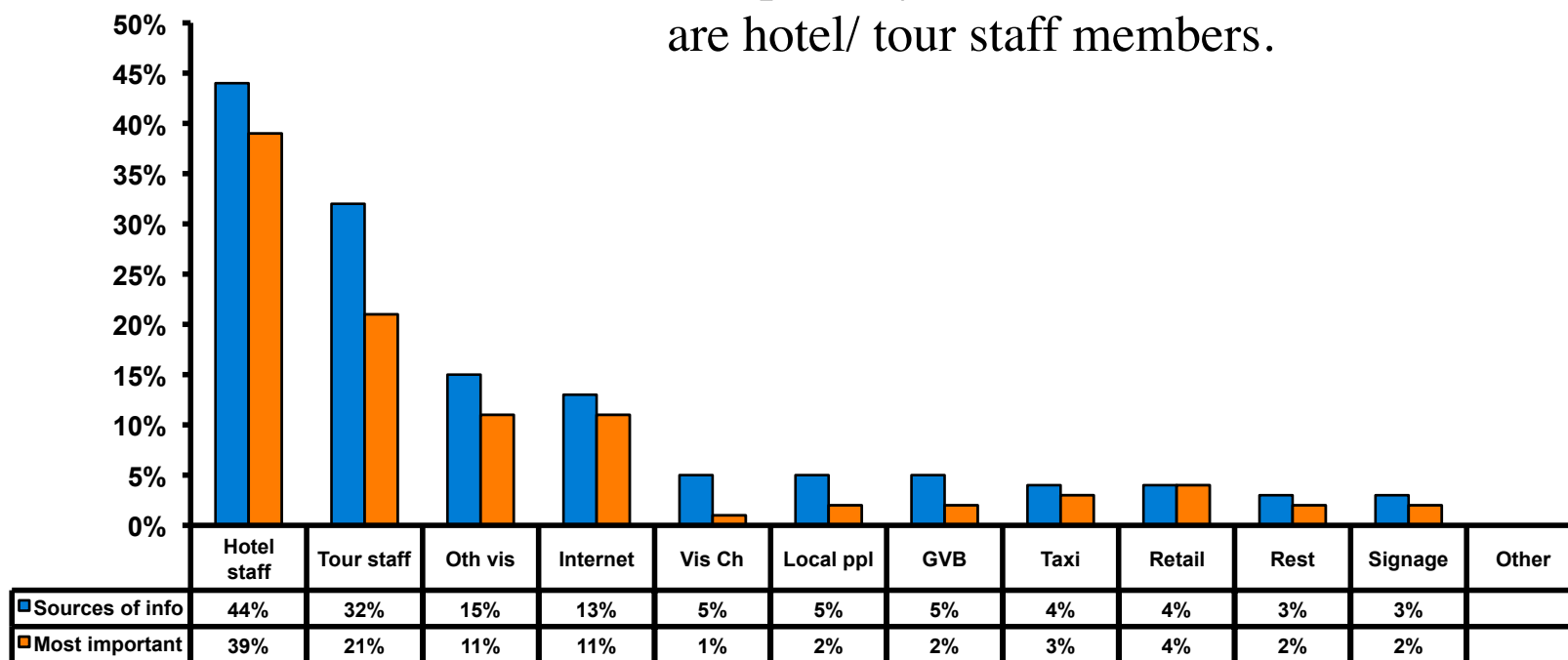
Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
 - ✓ Internet
 - ✓ Recommendation
 - ✓ Company



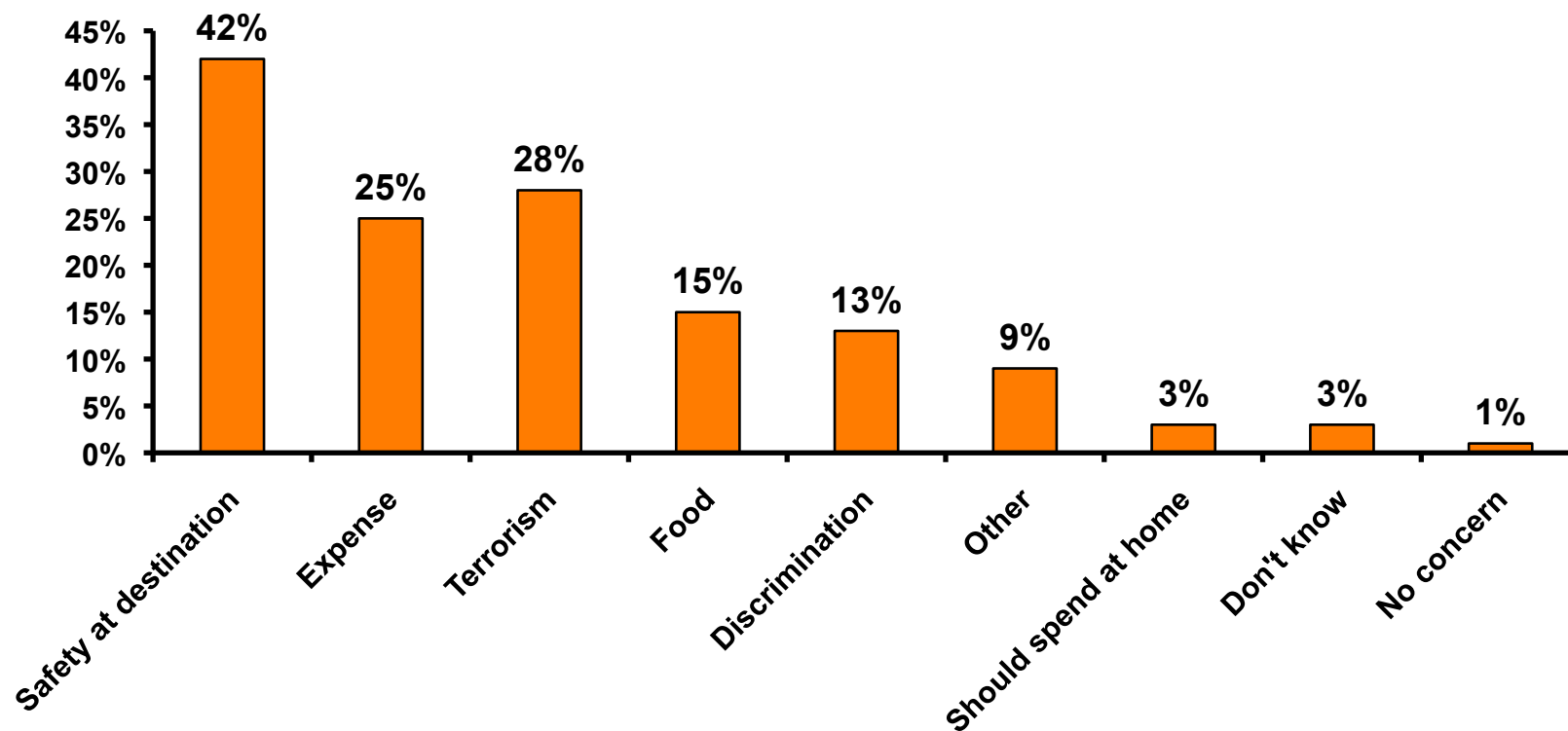
Sources of Information Post-arrival

- The primary local source of information are hotel/ tour staff members.



SECTION 6 **OTHER ISSUES**

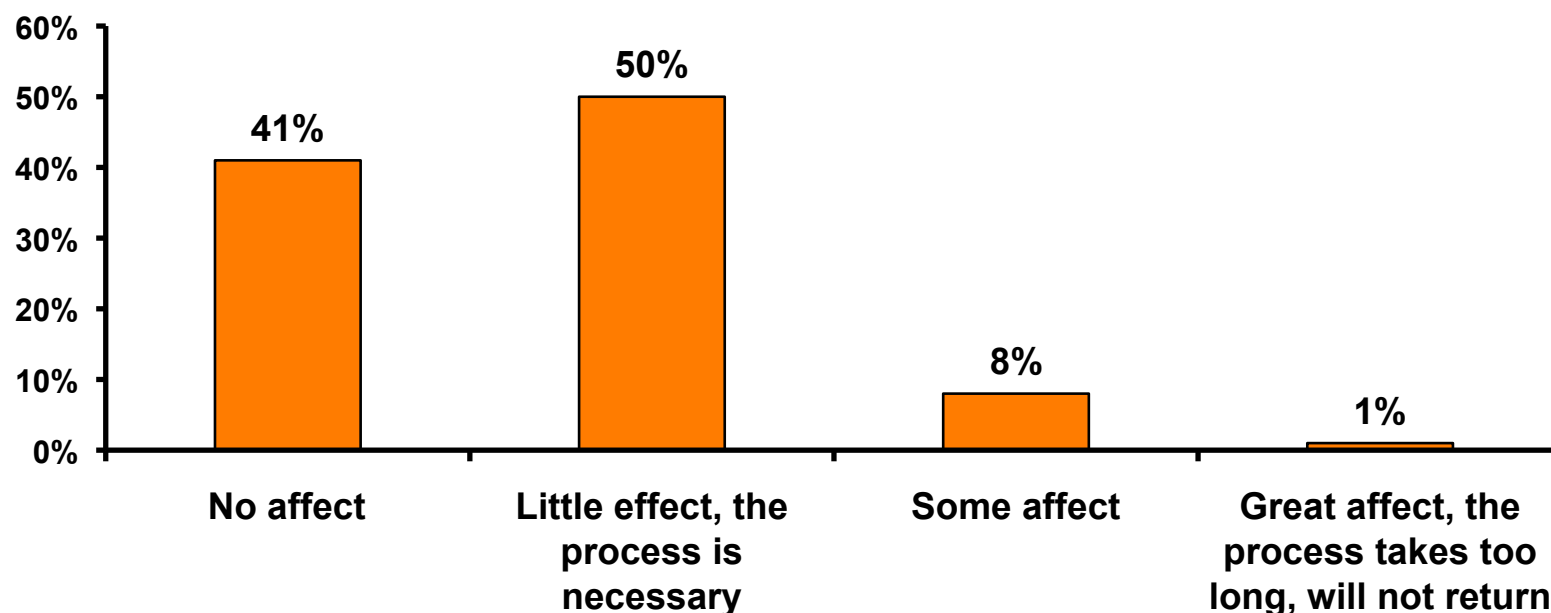
Concerns about travel outside of Taiwan - Overall



Concerns about travel outside of Taiwan - By Age & Income

		TOTAL	AGE				Q26							
		-	18-24	25-34	35-49	50+	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income
Q21	Safety	42%	15%	44%	40%	75%	75%	100%	100%	14%	41%	45%	95%	
	Terrorism	28%	15%	26%	30%	33%				57%	34%	31%	14%	
	Expense	25%	15%	31%	22%	17%	100%		50%	29%	19%	34%	33%	
	Food	15%		19%	12%	17%	25%		50%	14%	19%	10%	24%	
	Discrimination against Japanese	13%	23%	10%	16%	8%					6%			
	Other	9%	8%	10%	8%	17%	50%	100%	50%		9%	14%	10%	
	Don't know	3%	15%	4%						14%	3%	3%		
	Should spend at home	3%	8%	4%			25%				6%			
	No concerns	1%	8%	1%						14%	3%			
	Total	Count	149	13	70	50	12	4	1	2	7	32	29	21

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

