



GUAM VISITORS BUREAU

Taiwan Visitor Tracker Exit Profile

FY2013 Market Segmentation

2ND Qtr. (JAN~MAR 2013)



Prepared by: QMark Research

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Background & Methodology

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

Objectives

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

Highlighted Segments Parameters

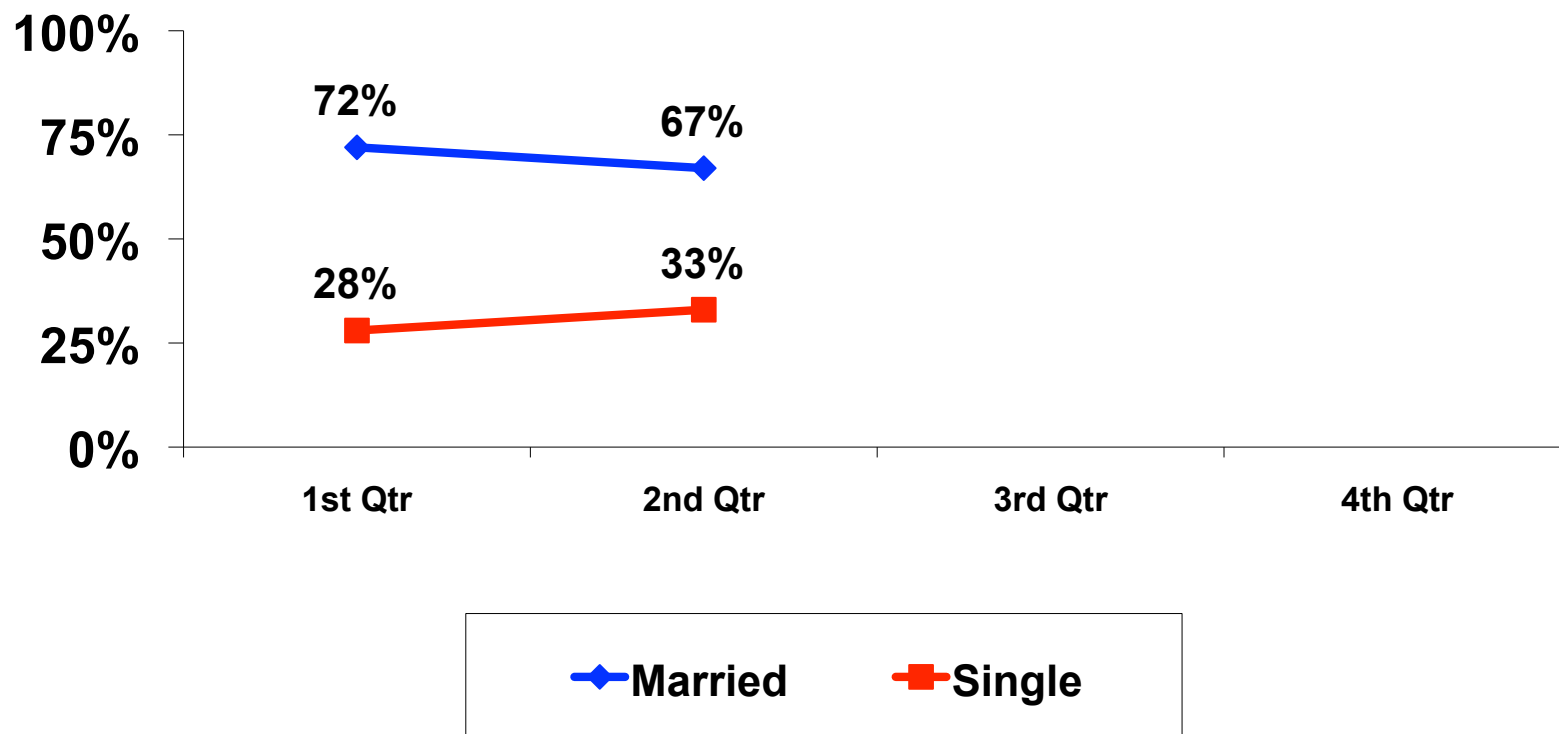
- General leisure group – Q.5A
- Family and/or Child – Q.6
- Special interest group – Q.18/Q7
- Incentive market – Q.5A/Q.7
- 20-40 year old – Q.F
- Mid-high level income – Q.26
- White-collar – Q.25
- W/child – Q.6
- Wedding/ Honeymoon – Q.5A/ Q.13
- Student –Q.25

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
General leisure group	23%	24%		
Child	9%	17%		
Incentive market	3%	3%		
Male 20-40	39%	41%		
Female 20-40	39%	41%		
White collar	49%	53%		
Wedding/ Honeymooner	9%	14%		
Student	2%	3%		
Mid-High income	26%	35%		
TOTAL	154	150		

SECTION 1 **PROFILE OF RESPONDENTS**

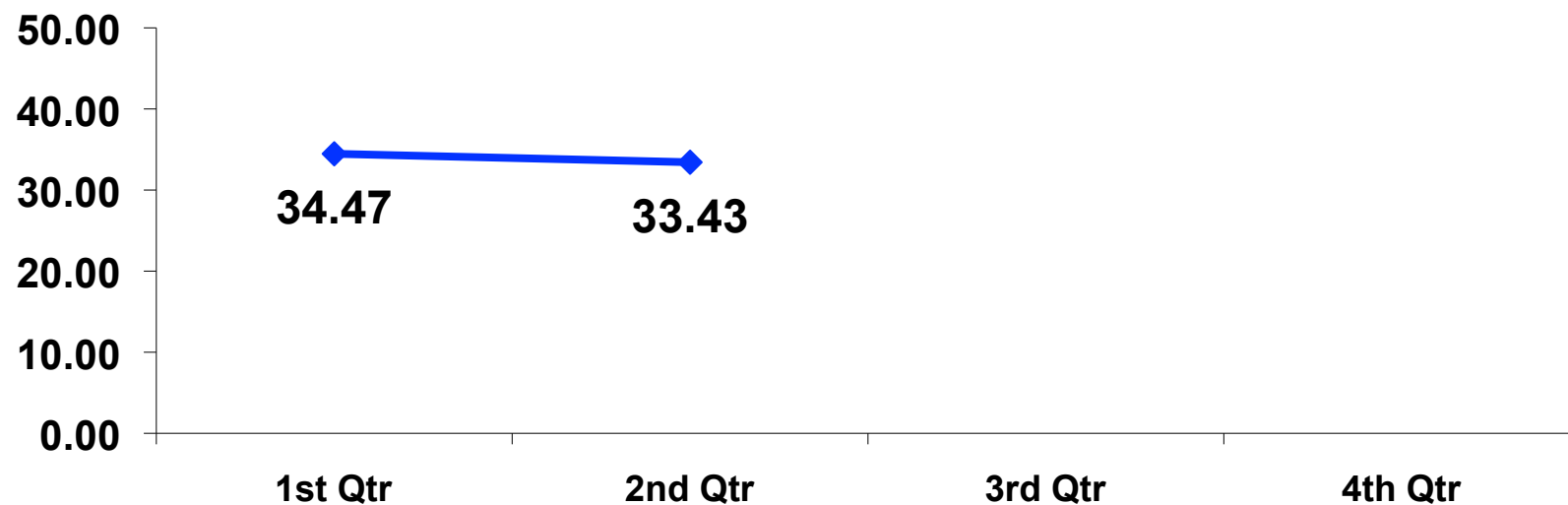
Marital Status Tracking



Marital Status Segmentation

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
QE	Married	Count	100	17	23	3	36	39	56	16	0	37
		Column N %	67%	47%	88%	75%	59%	63%	70%	76%	0%	71%
	Single	Count	50	19	3	1	25	23	24	5	5	15
		Column N %	33%	53%	12%	25%	41%	37%	30%	24%	100%	29%
	Total	Count	150	36	26	4	61	62	80	21	5	52

Average Age Tracking



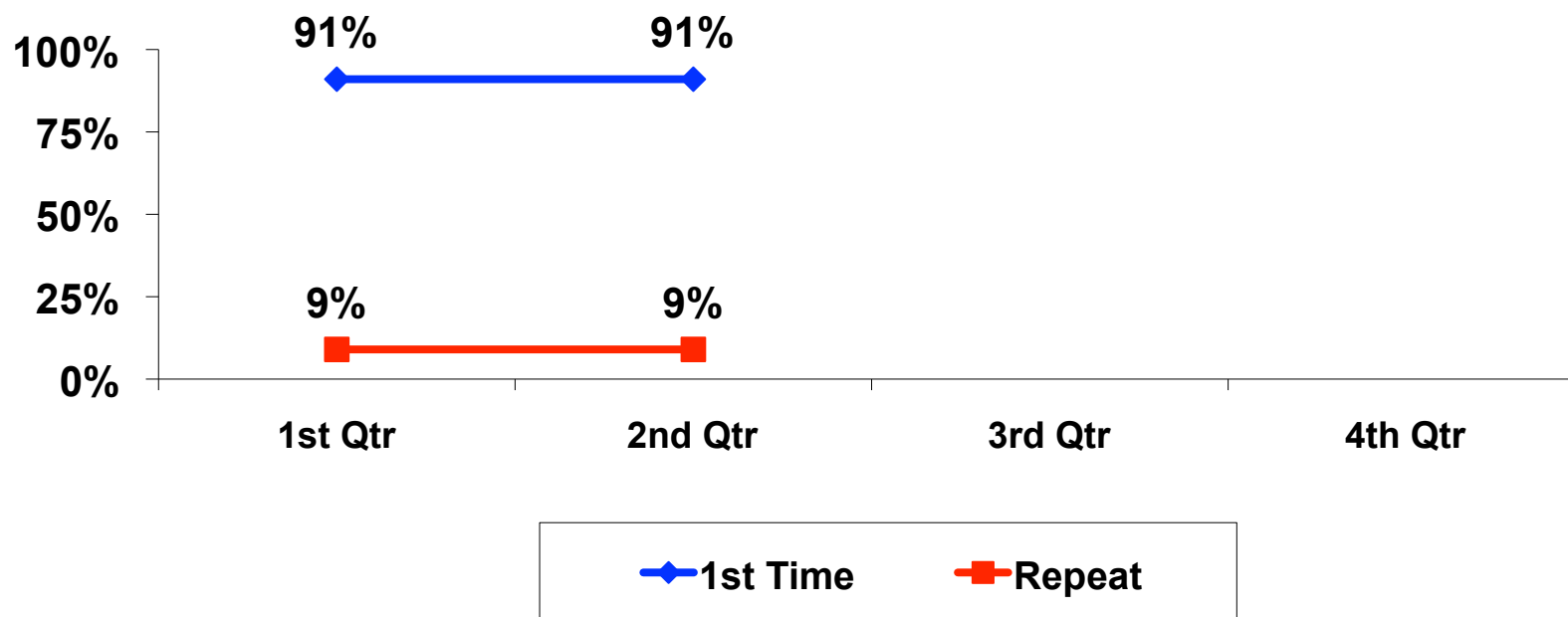
Age Segmentation

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	11	6	3	0	4	7	4	0	4	0
		Column N %	7%	17%	12%	0%	7%	11%	5%	0%	80%	0%
	25-34	Count	77	22	6	1	41	36	39	18	1	31
		Column N %	52%	61%	23%	25%	67%	58%	49%	86%	20%	60%
	35-49	Count	56	8	17	3	16	19	35	1	0	19
		Column N %	38%	22%	65%	75%	26%	31%	44%	5%	0%	37%
	50+	Count	4	0	0	0	0	0	1	2	0	2
		Column N %	3%	0%	0%	0%	0%	0%	1%	10%	0%	4%
	Total	Count	148	36	26	4	61	62	79	21	5	52
	Mean		33.43	30.69	36.81	39.00	30.54	31.21	33.75	33.19	22.80	34.15
	Median		32	31	38	39	30	31	34	31	22	32

Income Segmentation

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
Q26	<=NT160K	Count	6	1	2	0	1	4	3	1	1	0
		Column N %	6%	5%	9%	0%	3%	9%	5%	5%	33%	0%
	NT160K-NT200K	Count	2	2	1	0	1	1	2	1	0	0
		Column N %	2%	9%	5%	0%	3%	2%	3%	5%	0%	0%
	NT200K-NT400K	Count	8	3	2	0	3	4	5	3	0	0
		Column N %	8%	14%	9%	0%	8%	9%	8%	15%	0%	0%
	NT400K-NT600K	Count	19	6	3	1	8	9	11	4	0	19
		Column N %	19%	27%	14%	33%	22%	20%	17%	20%	0%	37%
	NT600K-NT800K	Count	33	3	3	0	14	13	26	6	0	33
		Column N %	33%	14%	14%	0%	38%	30%	39%	30%	0%	63%
	NT800K-NT1.0M	Count	17	2	6	2	4	6	14	3	0	0
		Column N %	17%	9%	27%	67%	11%	14%	21%	15%	0%	0%
	NT1.0M+	Count	13	4	5	0	4	6	2	2	2	0
		Column N %	13%	18%	23%	0%	11%	14%	3%	10%	67%	0%
	No Income	Count	3	1	0	0	2	1	3	0	0	0
		Column N %	3%	5%	0%	0%	5%	2%	5%	0%	0%	0%
	Total	Count	101	22	22	3	37	44	66	20	3	52

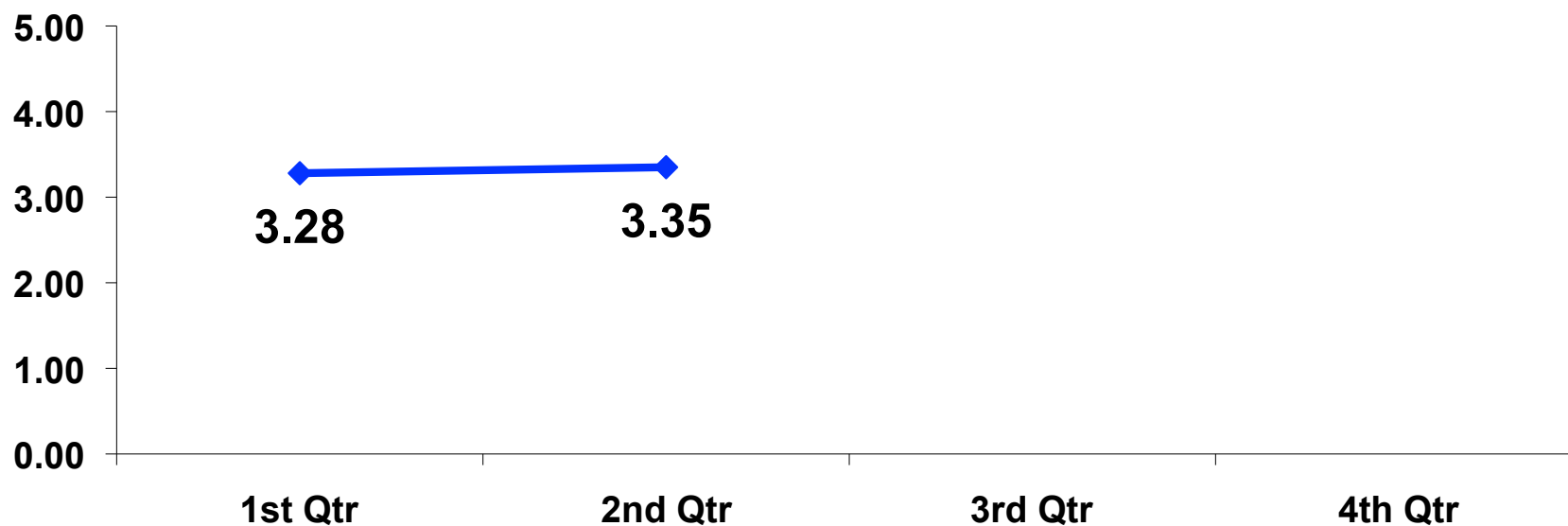
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	137	32	22	3	56	57	72	19	5	48
		Column N %	91%	89%	85%	75%	92%	92%	90%	90%	100%	92%
	No	Count	13	4	4	1	5	5	8	2	0	4
		Column N %	9%	11%	15%	25%	8%	8%	10%	10%	0%	8%
	Total	Count	150	36	26	4	61	62	80	21	5	52

Average Length of Stay Tracking



Average Length of Stay Segmentation

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
Q8	Mean	3.35	3.44	3.68	3.50	3.25	3.46	3.25	3.52	4.60	3.27
	Median	3	3	4	4	3	3	3	4	4	3

SECTION 2 **TRAVEL PLANNING**

Travel Planning Segmentation

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
Q7	Full package tour	Count	42	12	7	1	20	16	20	9	1	11
		Column N %	29%	33%	27%	25%	34%	27%	26%	45%	20%	22%
	Free-time package tour	Count	60	16	13	1	24	25	31	9	3	21
		Column N %	41%	44%	50%	25%	41%	42%	40%	45%	60%	41%
	Individually arranged travel (FIT)	Count	42	8	6	0	14	19	25	2	1	19
		Column N %	29%	22%	23%	0%	24%	32%	32%	10%	20%	37%
	Company paid travel	Count	2	0	0	2	1	0	2	0	0	0
		Column N %	1%	0%	0%	50%	2%	0%	3%	0%	0%	0%
	Total	Count	146	36	26	4	59	60	78	20	5	51

Travel Motivation Segmentation

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	2%	3%	8%	0%	0%	3%	1%	0%	0%	2%
	Price	5%	6%	8%	0%	3%	8%	6%	5%	0%	4%
	Visit friends/ Relatives	2%	0%	4%	0%	0%	3%	1%	0%	0%	2%
	Recomm- friend/family/trvl agnt	23%	31%	58%	25%	18%	29%	24%	33%	20%	23%
	Scuba	11%	6%	15%	0%	10%	10%	11%	0%	20%	8%
	Water sports	11%	14%	15%	0%	10%	13%	11%	14%	0%	15%
	Short travel time	3%	0%	12%	0%	2%	5%	1%	5%	0%	0%
	Golf	6%	8%	0%	0%	5%	6%	8%	0%	0%	8%
	Relax	21%	86%	19%	25%	23%	23%	18%	10%	20%	15%
	Company/ Business Trip	1%	3%	0%	0%	2%	2%	1%	0%	0%	4%
	Company Sponsored	1%	3%	0%	50%	2%	0%	0%	0%	0%	2%
	Convention/ Trade/ Conference	4%	0%	4%	50%	2%	5%	4%	0%	0%	2%
	Safe	13%	17%	15%	0%	13%	16%	11%	10%	0%	10%
	Natural beauty	46%	44%	62%	25%	43%	44%	44%	57%	40%	42%
	Shopping	19%	28%	31%	0%	15%	24%	18%	29%	0%	13%
	Career Cert/ Testing	1%	0%	0%	0%	0%	3%	0%	0%	40%	0%
	Married/ Attn wedding	9%	3%	12%	0%	3%	15%	10%	62%	0%	12%
	Honeymoon	5%	3%	0%	0%	10%	3%	5%	38%	0%	8%
	Pleasure	4%	17%	0%	0%	3%	6%	6%	0%	0%	2%
	No Visa requirement	12%	11%	23%	0%	10%	13%	11%	10%	0%	12%
	Total Count	149	36	26	4	60	62	79	21	5	52

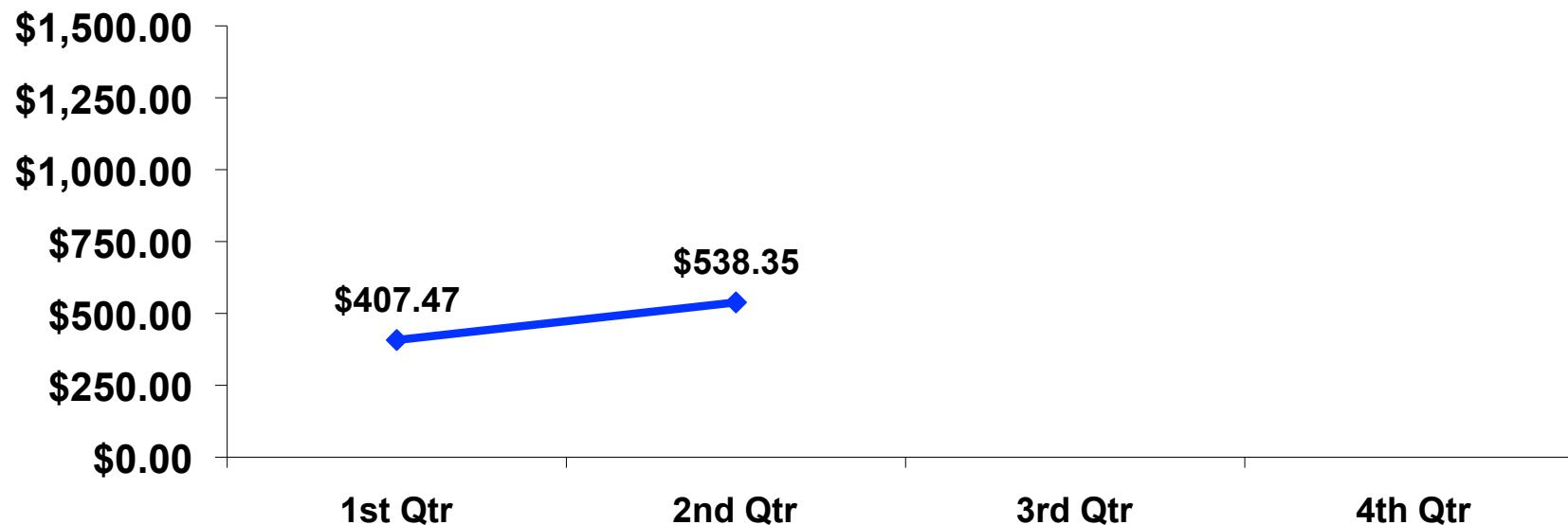
Information Sources

Segmentation

			GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME	
		TOTAL										
		-	-	-	-	-	-	-	-	-	-	
Q1	Internet	56%	56%	58%	100%	49%	56%	64%	38%	100%	54%	
	Friend/ Relative	41%	42%	62%	25%	43%	37%	39%	62%	20%	37%	
	TV	20%	19%	12%	50%	18%	23%	18%	14%	0%	19%	
	Travel Agent Brochure	11%	14%	12%	0%	8%	15%	6%	29%	0%	12%	
	Co-Worker/ Company Trvl Dept	10%	14%	12%	0%	10%	8%	6%	10%	0%	10%	
	Newspaper	9%	11%	4%	0%	8%	10%	10%	5%	20%	10%	
	Magazine (Consumer)	9%	8%	23%	0%	5%	11%	10%	10%	0%	10%	
	Travel Guidebook- Bookstore	8%	6%	15%	0%	3%	13%	8%	14%	40%	6%	
	Travel Trade Show	7%	8%	8%	0%	8%	8%	6%	14%	0%	4%	
	GVB Promo	6%	3%	8%	0%	5%	6%	5%	10%	20%	6%	
	Prior Trip	5%	8%	15%	0%	5%	6%	6%	10%	0%	4%	
	Consumer Trvl Show	5%	3%	0%	0%	5%	5%	3%	14%	0%	2%	
	GVB Office	2%	3%	0%	0%	2%	2%	1%	5%	0%	4%	
	Other	1%	3%	0%	0%	0%	2%	1%	0%	0%	0%	
	Radio	1%	0%	0%	0%	0%	2%	1%	0%	0%	2%	
	Total	Count	150	36	26	4	61	62	80	21	5	52

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

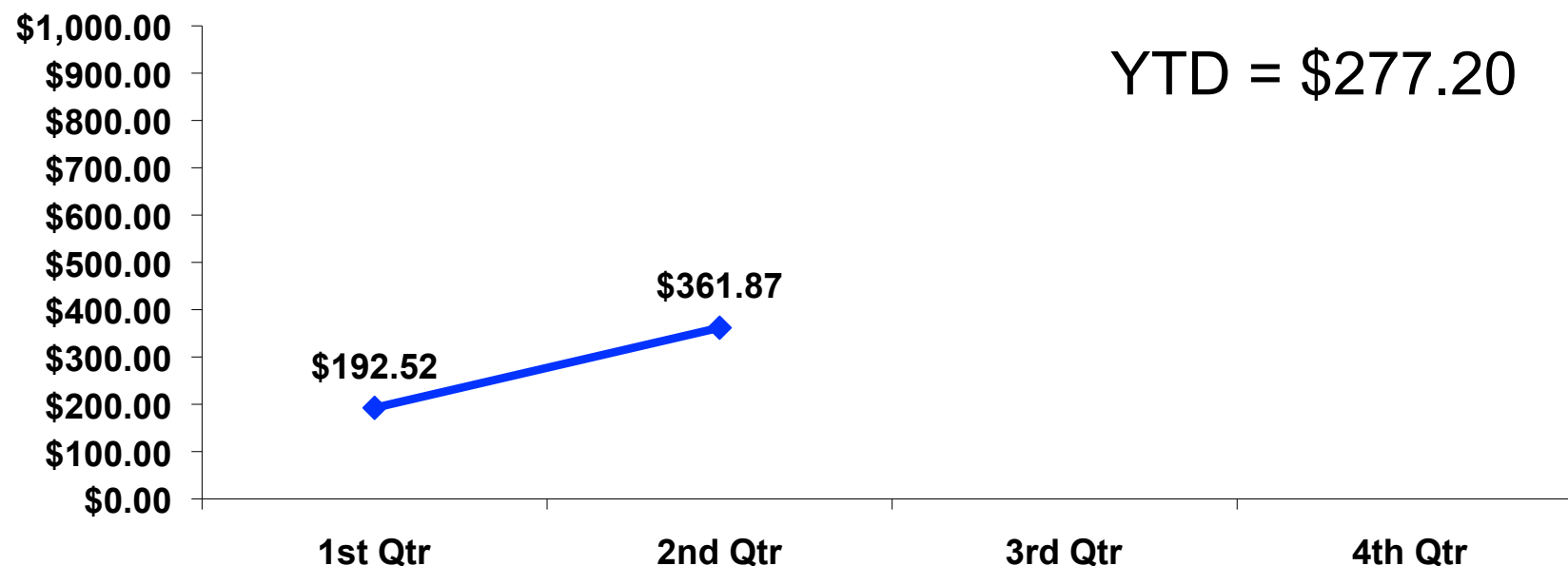


YTD=\$472.91

Prepaid Expenditures Per Person Segmentation

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$538.35	\$570.70	\$1,060.00	\$268.34	\$509.50	\$557.52	\$456.11	\$602.77	\$945.31	\$449.26
	Median	\$493	\$510	\$531	\$0	\$435	\$504	\$484	\$770	\$662	\$484
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$498	\$0
	Maximum	\$5,661	\$3,142	\$5,661	\$1,073	\$5,661	\$4,339	\$3,142	\$1,189	\$1,529	\$1,359

On-Island Expenditures Tracking



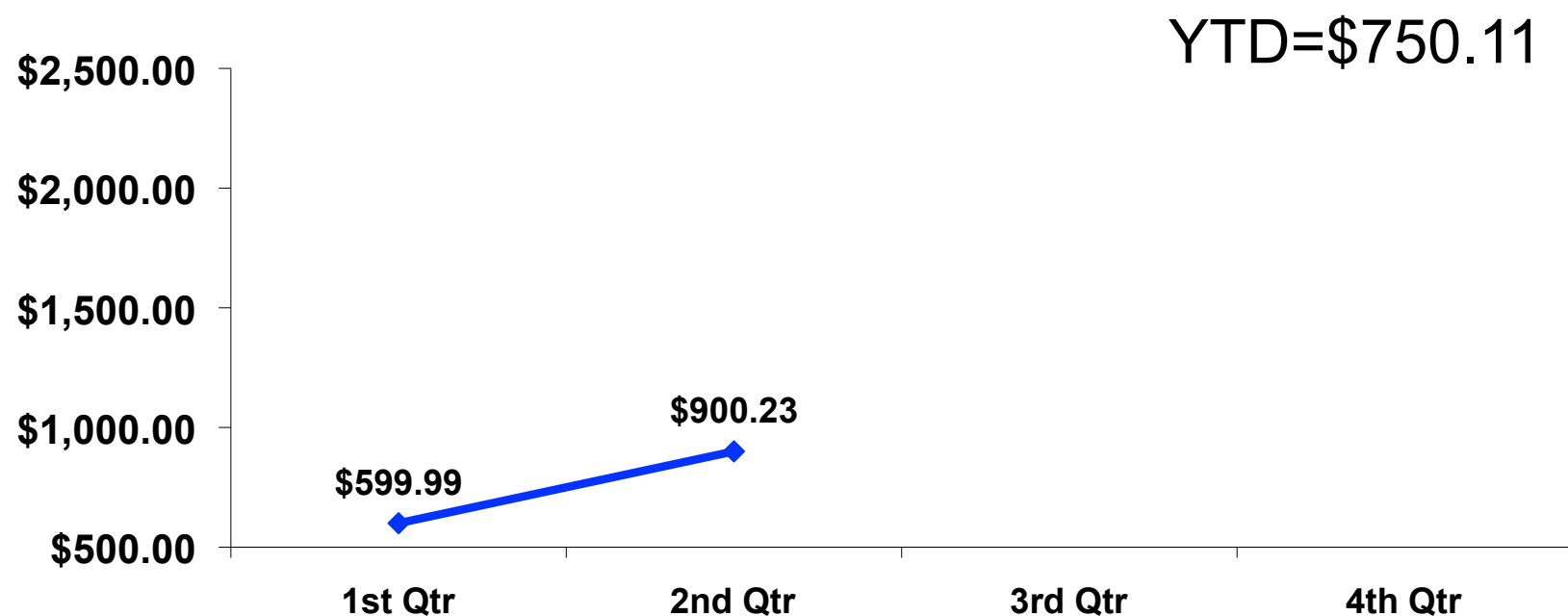
On-Island Expenditures Per Person Segmentation

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$361.87	\$426.03	\$490.61	\$167.50	\$325.86	\$410.27	\$381.43	\$539.55	\$392.00	\$321.94
	Median	\$250	\$275	\$314	\$160	\$200	\$259	\$273	\$303	\$450	\$250
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,150	\$3,150	\$2,830	\$350	\$3,150	\$2,830	\$2,860	\$2,830	\$685	\$1,610

On-Island Expense Breakdown

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,268.60	\$982.72	\$2,524.91	.	\$787.53	\$1,415.31	\$1,173.82	\$2,179.57	\$786.91	\$1,730.40
	Median	\$832	\$1,026	\$2,887	.	\$664	\$917	\$832	\$917	\$662	\$863
	Minimum	\$435	\$460	\$1,291	.	\$435	\$493	\$435	\$863	\$510	\$493
	Maximum	\$4,759	\$1,698	\$3,397	.	\$1,359	\$3,397	\$3,397	\$4,759	\$1,189	\$4,759
AIR/ HOTEL/ MEAL	Mean	\$1,338.26	\$1,136.28	\$2,272.12	\$1,073.37	\$1,174.03	\$1,384.36	\$1,354.43	\$1,280.07	\$1,253.40	\$1,208.78
	Median	\$1,104	\$973	\$1,936	\$1,073	\$1,091	\$1,112	\$1,098	\$1,078	\$1,253	\$1,072
	Minimum	\$245	\$245	\$340	\$1,073	\$245	\$520	\$340	\$520	\$978	\$245
	Maximum	\$4,416	\$4,416	\$4,416	\$1,073	\$2,230	\$4,203	\$4,416	\$2,785	\$1,529	\$2,785
AIR ONLY	Mean	\$5,640.29	\$2,038.04	\$6,841.03	.	\$16,983.70	\$2,038.04	\$1,769.70	.	.	.
	Median	\$2,038	\$2,038	\$2,038	.	\$16,984	\$2,038	\$1,770	.	.	.
	Minimum	\$1,501	\$2,038	\$1,501	.	\$16,984	\$2,038	\$1,501	.	.	.
	Maximum	\$16,984	\$2,038	\$16,984	.	\$16,984	\$2,038	\$2,038	.	.	.
HOTEL ONLY	Mean	\$2,672.10	.	\$2,663.04	.	.	\$2,386.21	\$2,173.91	.	.	\$2,173.91
	Median	\$2,310	.	\$1,902	.	.	\$2,310	\$1,902	.	.	\$1,902
	Minimum	\$849	.	\$849	.	.	\$849	\$1,902	.	.	\$1,902
	Maximum	\$4,586	.	\$4,586	.	.	\$4,076	\$2,717	.	.	\$2,717
HOTEL & MEAL	Mean	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.
	Minimum	.	.	.	.	.	.	.	.	.	.
	Maximum	.	.	.	.	.	.	.	.	.	.
F&B HOTEL	Mean	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.
	Minimum	.	.	.	.	.	.	.	.	.	.
	Maximum	.	.	.	.	.	.	.	.	.	.
TRANS- TAIWAN	Mean	\$83.61	\$44.84	\$185.27	.	\$28.59	\$54.69	\$39.13	\$38.34	\$16.98	\$46.49
	Median	\$34	\$34	\$102	.	\$31	\$32	\$20	\$24	\$17	\$34
	Minimum	\$4	\$10	\$17	.	\$5	\$6	\$6	\$5	\$17	\$6
	Maximum	\$713	\$102	\$713	.	\$51	\$136	\$102	\$102	\$17	\$102
TRANS- GUAM	Mean	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.
	Minimum	.	.	.	.	.	.	.	.	.	.
	Maximum	.	.	.	.	.	.	.	.	.	.
OPT TOURS	Mean	\$725.34	\$525.93	\$1,698.37	.	\$49.25	\$169.84	\$764.27	\$169.84	.	\$10.87
	Median	\$170	\$170	\$1,698	.	\$49	\$170	\$764	\$170	.	\$11
	Minimum	\$11	\$49	\$1,359	.	\$49	\$170	\$170	\$170	.	\$11
	Maximum	\$2,038	\$1,359	\$2,038	.	\$49	\$170	\$1,359	\$170	.	\$11
OTHER	Mean	\$1,508.74	\$1,925.95	\$2,819.29	.	\$925.61	\$743.51	\$1,913.50	\$475.54	\$339.67	\$910.70
	Median	\$713	\$713	\$1,019	.	\$926	\$679	\$951	\$476	\$340	\$713
	Minimum	\$170	\$272	\$170	.	\$493	\$170	\$170	\$272	\$340	\$272
	Maximum	\$6,793	\$6,793	\$6,793	.	\$1,359	\$1,936	\$6,793	\$679	\$340	\$1,670
TOTAL	Mean	\$1,062.12	\$908.18	\$3,027.68	\$268.34	\$845.67	\$917.38	\$872.96	\$1,126.99	\$1,044.84	\$865.88
	Median	\$673	\$535	\$1,637	\$0	\$510	\$746	\$493	\$917	\$995	\$739
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$510	\$0
	Maximum	\$16,984	\$12,568	\$16,984	\$1,073	\$16,984	\$4,339	\$12,568	\$5,540	\$1,529	\$5,540

Total Expenditures Tracking



Total Expenditures Per Person Segmentation

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$900.23	\$996.73	\$1,550.60	\$435.84	\$835.36	\$967.79	\$837.54	\$1,142.32	\$1,337.31	\$771.20
	Median	\$673	\$789	\$997	\$175	\$637	\$744	\$693	\$1,070	\$1,183	\$751
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$662	\$0
	Maximum	\$5,861	\$3,710	\$5,861	\$1,393	\$5,861	\$5,005	\$3,373	\$3,373	\$1,979	\$2,381

SECTION 4 **ADVANCED STATISTICS**

Analysis Technique

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

Comparison of Drivers of Overall Satisfaction, 1st Qtr 2012, 2nd Qtr 2013 and Overall 1st Qtr 2012, 2nd Qtr 2013			
	1st Qtr 2012	2nd Qtr 2013	Combined 1st Qtr 2012 & 2nd Qtr 2013
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks	2		
Ease of getting around			
Safety walking around at night		3	
Quality of daytime tours		1	
Variety of daytime tours			2
Quality of nighttime tours		4	
Variety of nighttime tours			
Quality of shopping			
Variety of shopping			
Price of things on Guam	1		
Quality of hotel accommodations		2	1
Quality/cleanliness of air, sky			
Quality/cleanliness of parks			
Quality of landscape in Tumon			
Quality of landscape in Guam			
Quality of ground handler			
Quality/cleanliness of transportation vehicles			
% of Per Person On Island Expenditures Accounted For	32,4%	38.0%	31.3%
NOTE: Only significant drivers are included.			

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by four significant factors in the Second Quarter 2013 Period. By rank order they are:
 - **Quality of day time tours,**
 - **Quality of hotel accommodations,**
 - **Safety walking around at night, and**
 - **Quality of night time tours.**
- With these four factors the overall r^2 is .38 meaning that **38.0% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, 1st Qtr 2012, 2nd Qtr 2013 and Overall 1st Qtr 2012 and 2nd Qtr 2013

	1st Qtr 2012	2nd Qtr 2013	Combined 1st Qtr 2012 & 2nd Qtr 2013
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks			7
Ease of getting around		1	
Safety walking around at night			
Quality of daytime tours			
Variety of daytime tours			8
Quality of nighttime tours			9
Variety of nighttime tours		5	4
Quality of shopping	1	3	3
Variety of shopping			
Price of things on Guam	2		
Quality of hotel accommodations		2	2
Quality/cleanliness of air, sky			5
Quality/cleanliness of parks			6
Quality of landscape in Tumon		4	1
Quality of landscape in Guam			
Quality of ground handler			
Quality/cleanliness of transportation vehicles			
% of Per Person On Island Expenditures Accounted For	9.6%	35.3%	35.8%

NOTE: Only significant drivers are included.

Drivers of Per Person On-Island Expenditure

- **Per person on-island expenditure** of the Taiwan visitor's on Guam is driven by five significant factors in the Second Quarter 2013 Period. By rank order they are:
 - **Ease of getting around,**
 - **Quality of hotel accommodations,**
 - **Quality of shopping,**
 - **Quality of landscape in Tumon, and**
 - **Variety of night time tours.**
- With these five factors the overall r^2 is .353 meaning that **35.3% of per person on island expenditure is accounted for by these factors.**