



# **GUAM VISITORS BUREAU**

## **Taiwan Visitor Tracker Exit Profile**

### **FY2013**

### **2ND Qtr. (JAN~MAR 2013)**



**Prepared by: QMark Research**

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# Background & Methodology

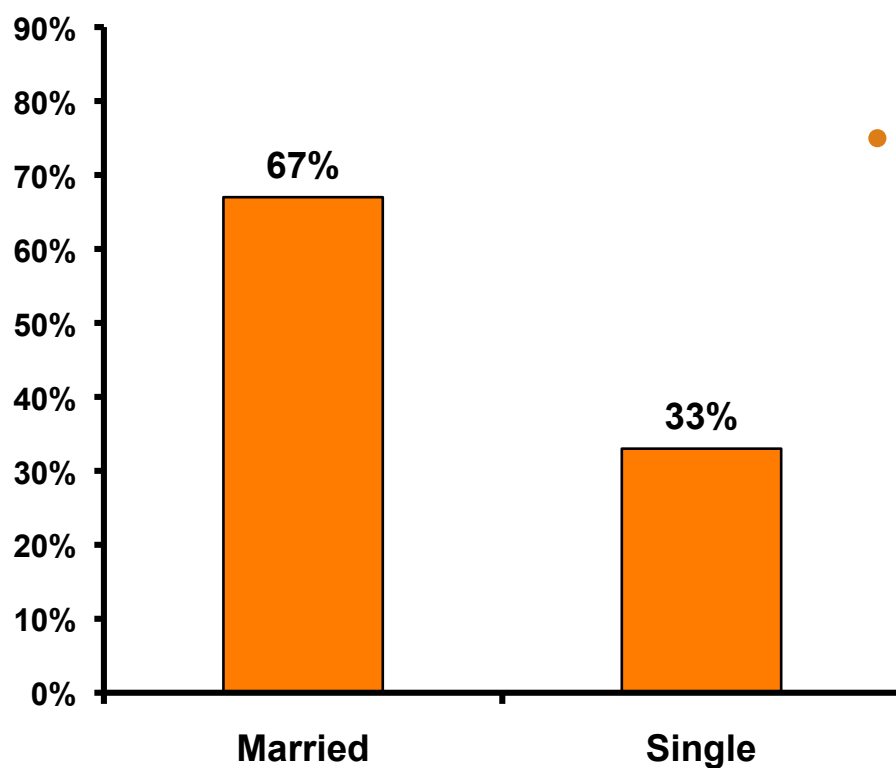
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **151** departing 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 **151** 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.

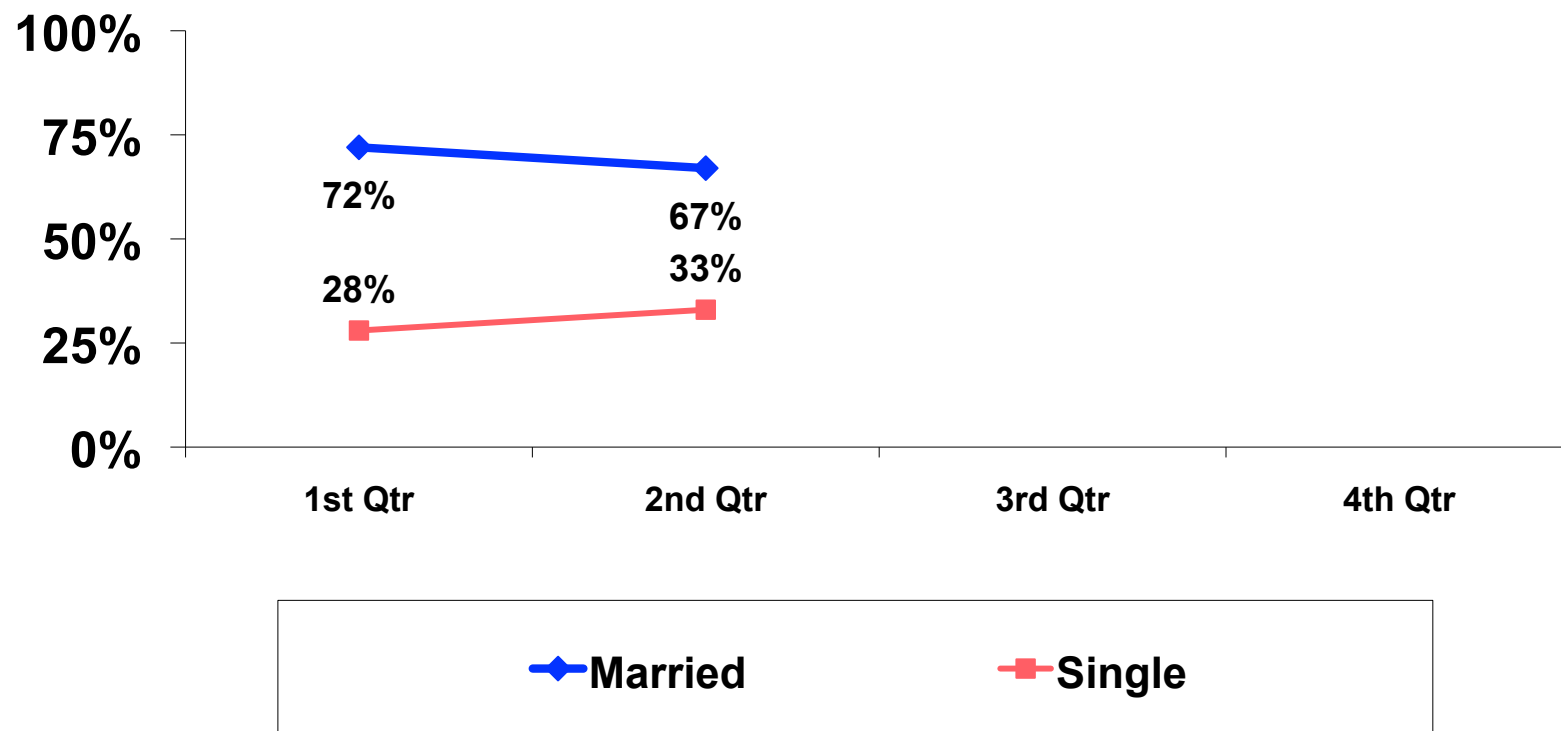
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

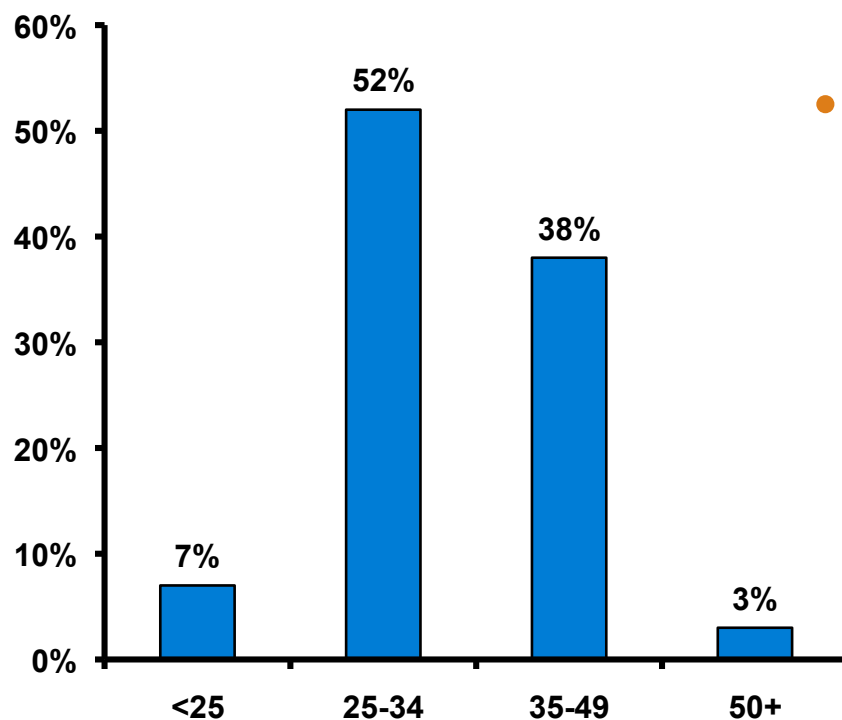


- Majority of Taiwanese visitors are married.

# Marital Status

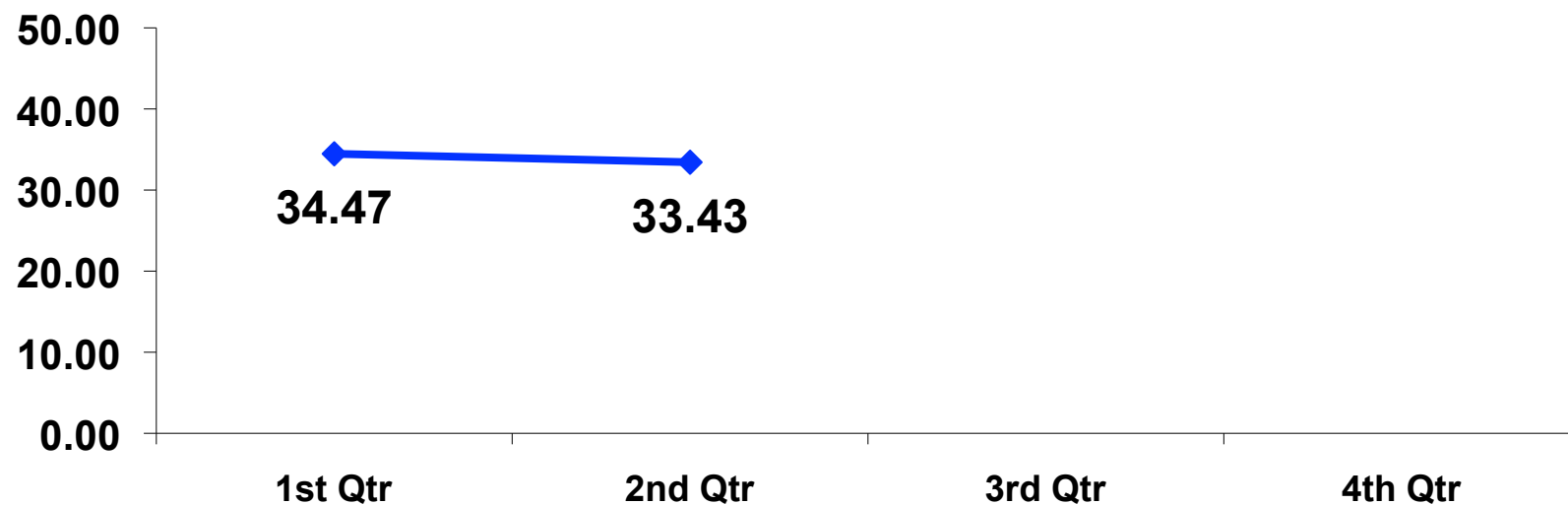


# Age - Overall



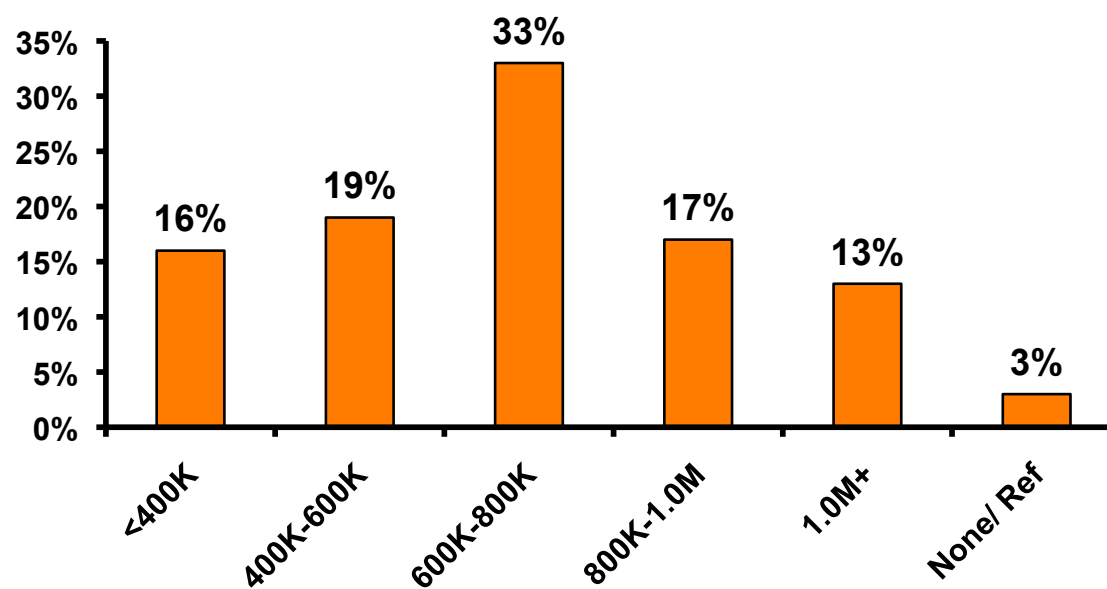
- The average age of the respondents is 33.43 years of age.

# Average Age



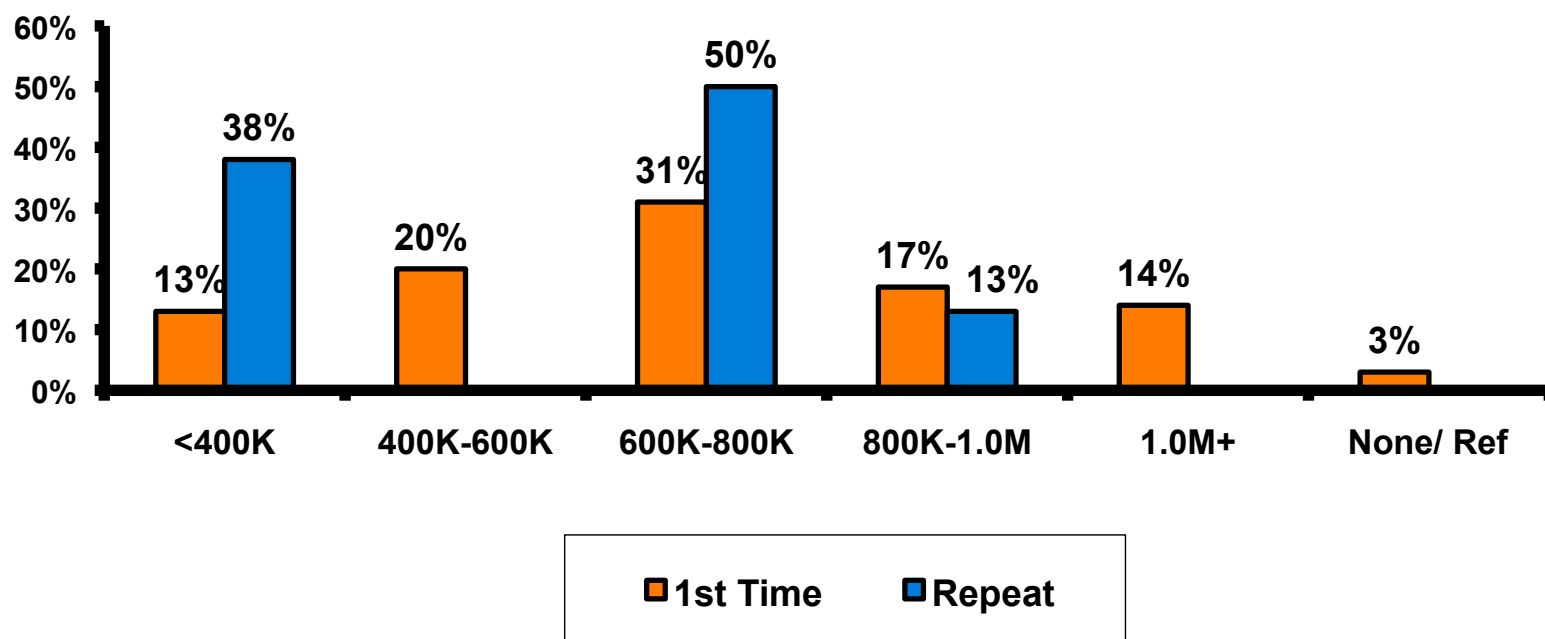


# Personal Income



• TWD29.44=\$1

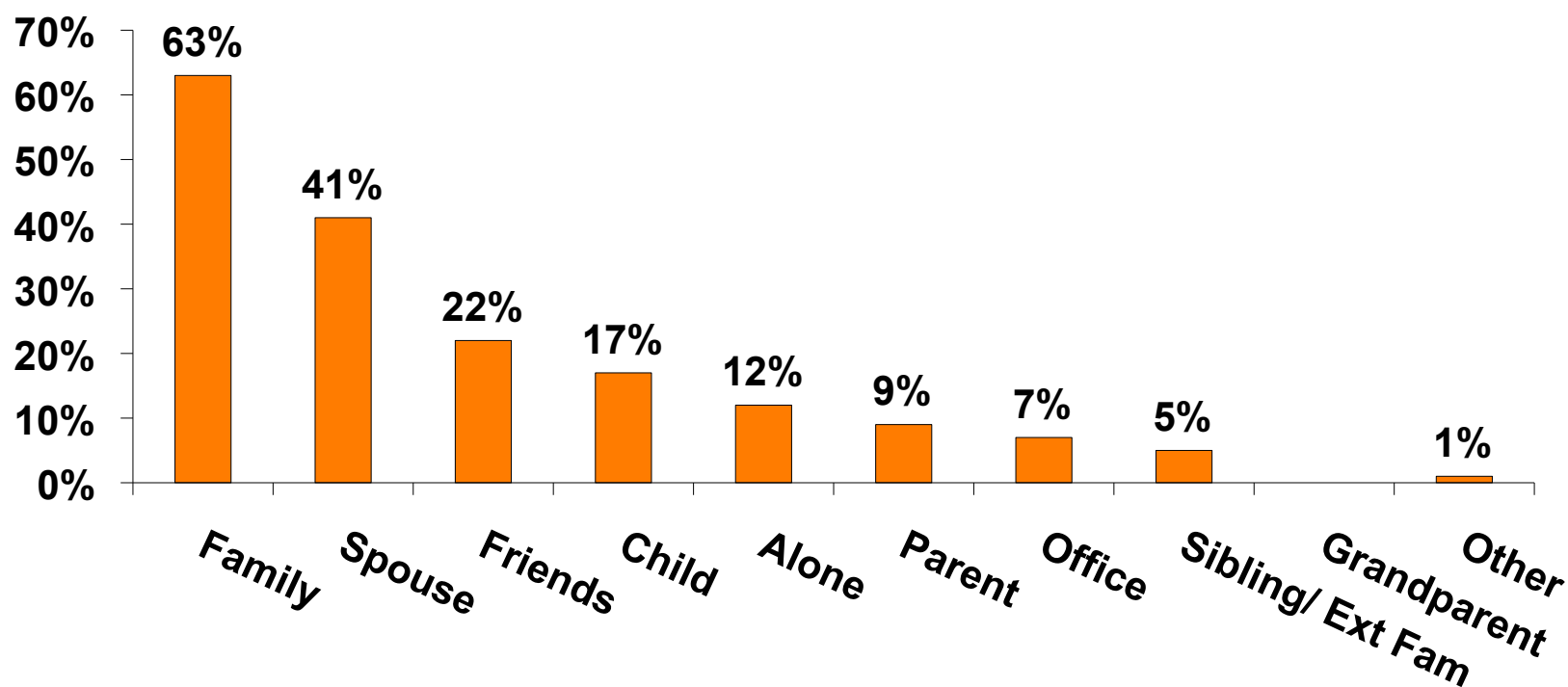
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<=NT160K	Count	6	1	5	2	3		
		Column N %	6%	2%	11%	33%	6%		
	NT160K-NT200K	Count	2	1	1	1	1		
		Column N %	2%	2%	2%	17%	2%		
	NT200K-NT400K	Count	8	4	4		6	2	
		Column N %	8%	7%	9%		11%	5%	
	NT400K-NT600K	Count	19	9	10		12	7	
		Column N %	19%	17%	21%		23%	18%	
	NT600K-NT800K	Count	33	19	14		19	12	2
		Column N %	33%	35%	30%		36%	32%	67%
	NT800K-NT1.0M	Count	17	11	6	1	5	11	
		Column N %	17%	20%	13%	17%	9%	29%	
	NT1.0M+	Count	13	7	6	2	7	3	1
		Column N %	13%	13%	13%	33%	13%	8%	33%
	No Income	Count	3	2	1			3	
		Column N %	3%	4%	2%			8%	
	Total	Count	101	54	47	6	53	38	3

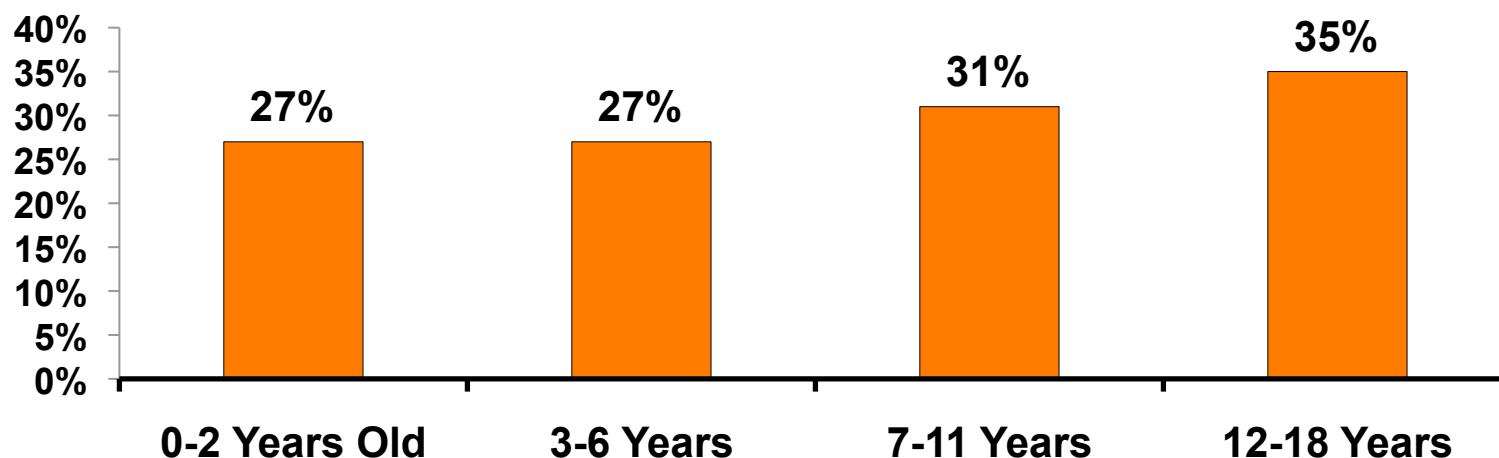
# Travel Companions



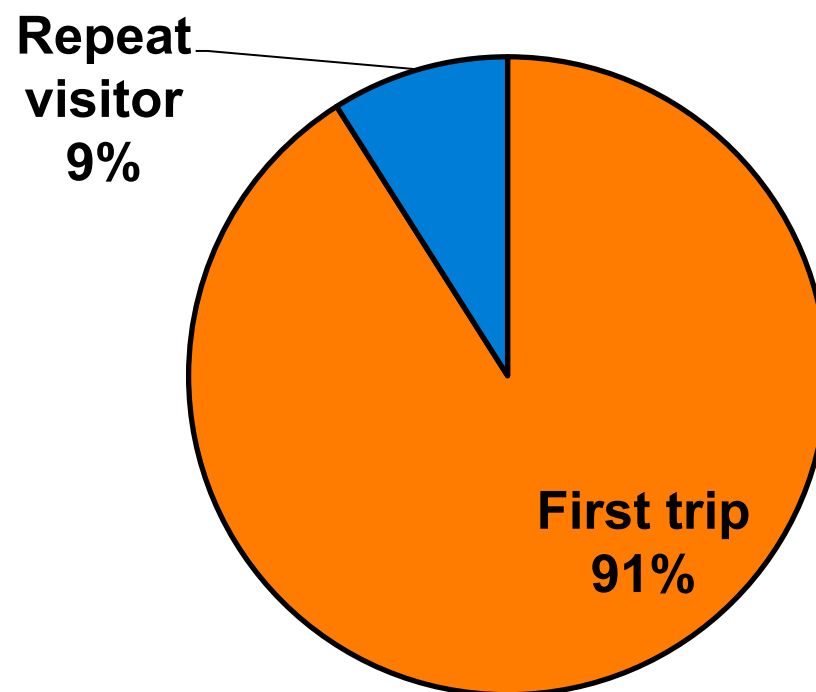
# Number of Children Travel Party

N=26 total respondents traveling with children.

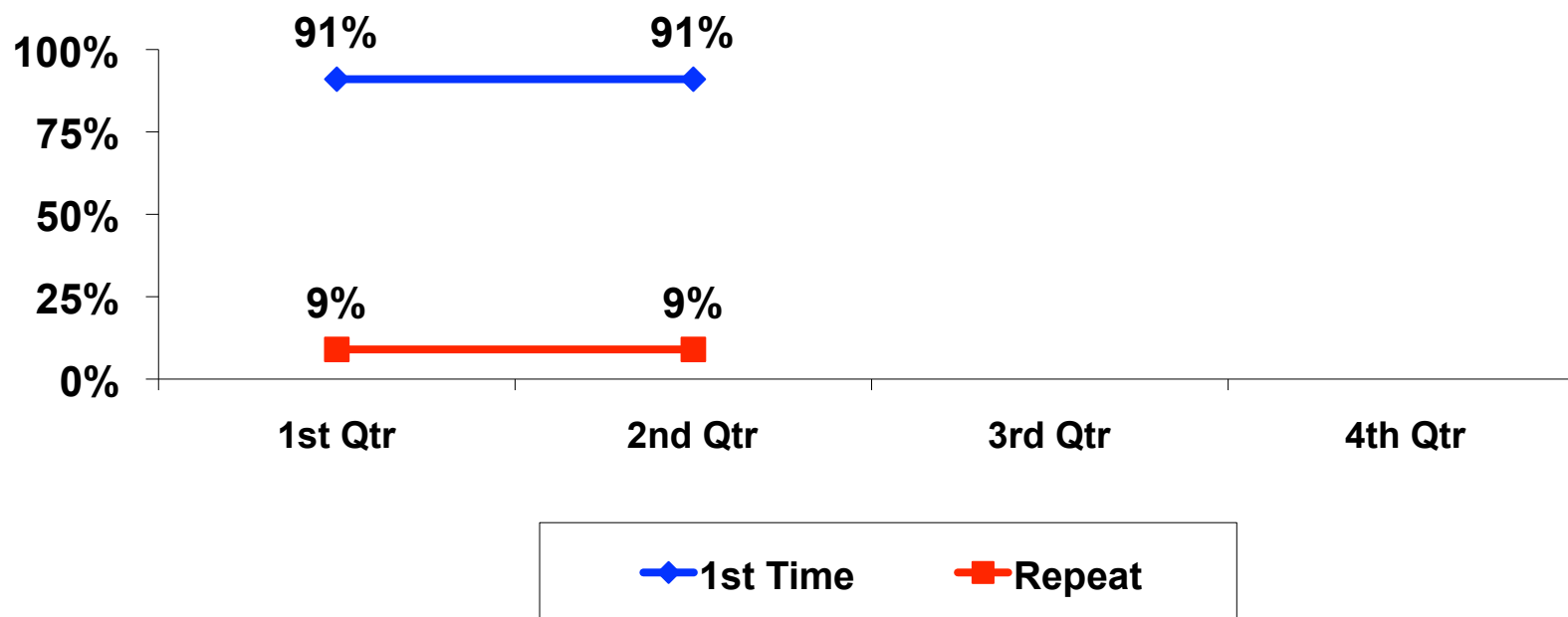
(Of those N=26 respondents, there is a total of 32 children 18 years or younger)



# Prior Trips to Guam



# Prior Trips to Guam



# Trips to Guam by Age & Gender

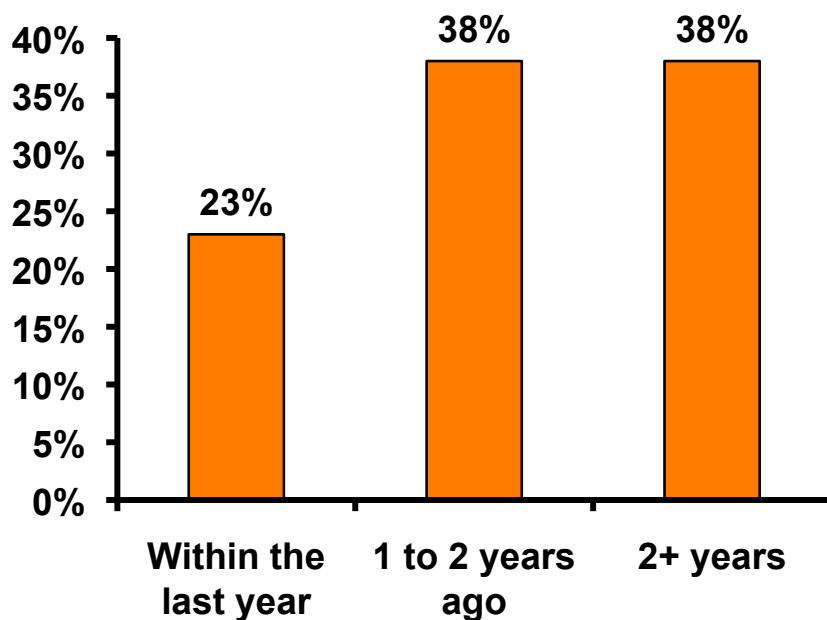
			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	82	74	8
		Column N %	55%	54%	62%
	Female	Count	68	63	5
		Column N %	45%	46%	38%
AGE	Total	Count	150	137	13
	18-24	Count	11	10	1
		Column N %	7%	7%	8%
	25-34	Count	77	70	7
		Column N %	52%	52%	54%
	35-49	Count	56	52	4
		Column N %	38%	39%	31%
	50+	Count	4	3	1
		Column N %	3%	2%	8%
	Total	Count	148	135	13

- Majority are first-time visitors to Guam.



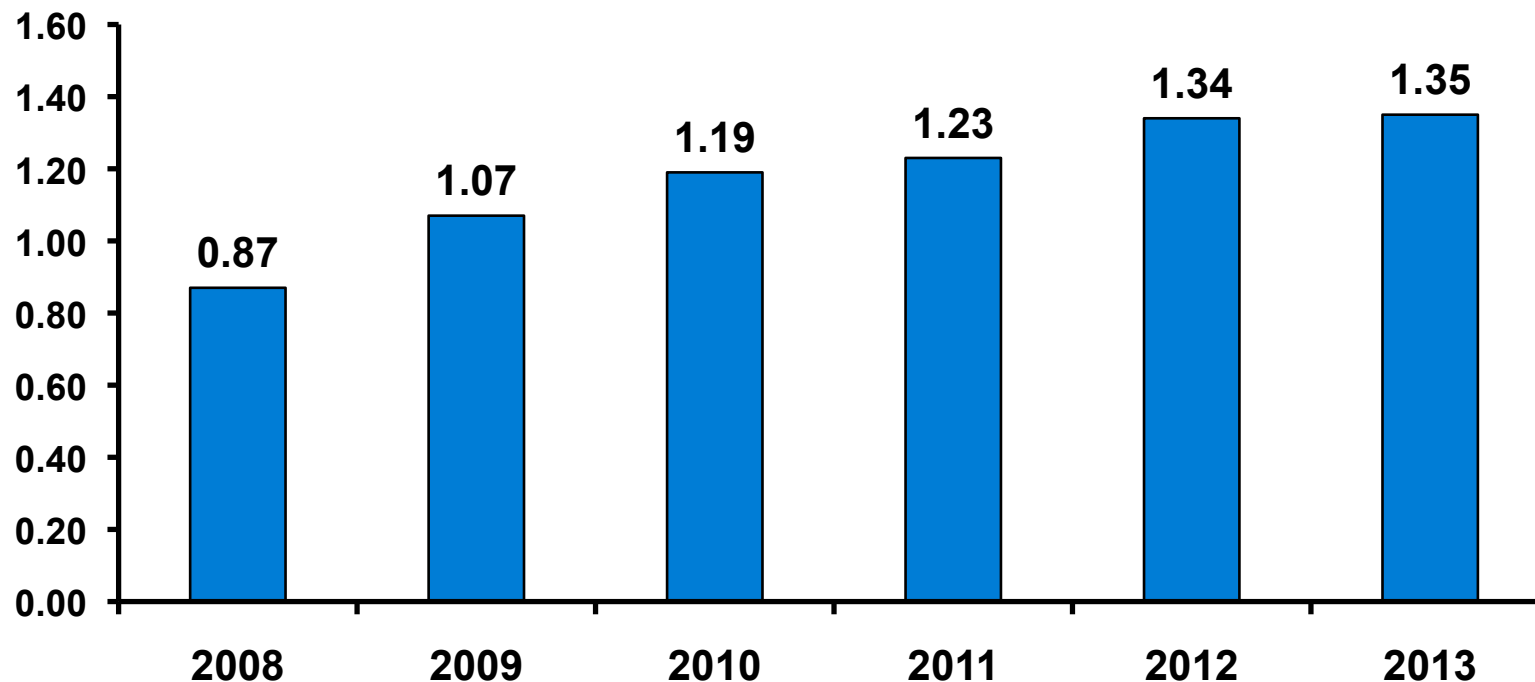
# Repeat Visitors Last Trip

n = 13



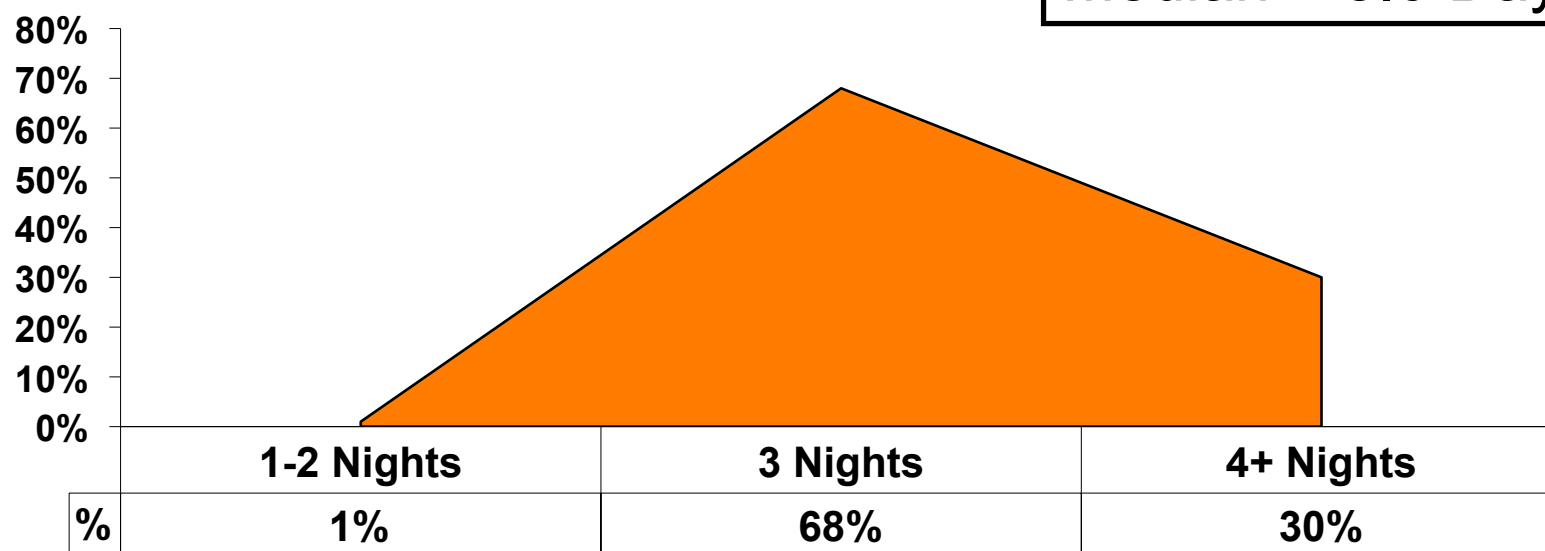
- The average repeat visitor has been to Guam 1.08 times.

# Average Number Overnight Trips (2008-2013) (2 nights or more)

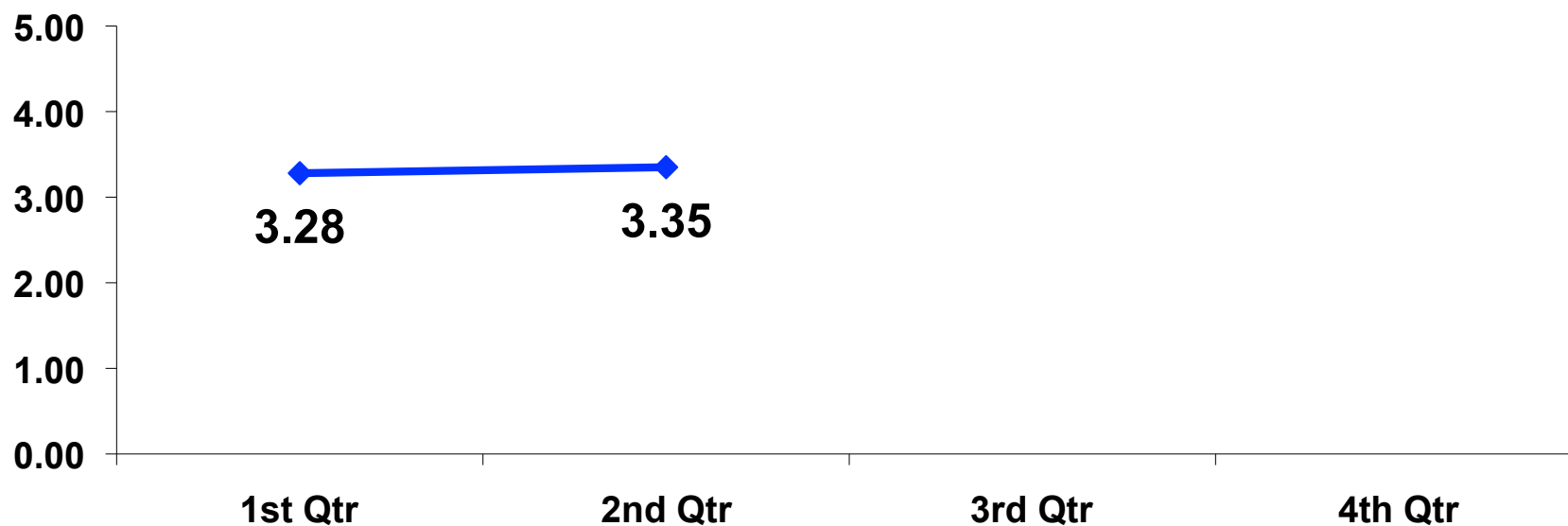


# Length of Stay

Mean = 3.35 Days  
Median = 3.0 Days



# Average Length of Stay

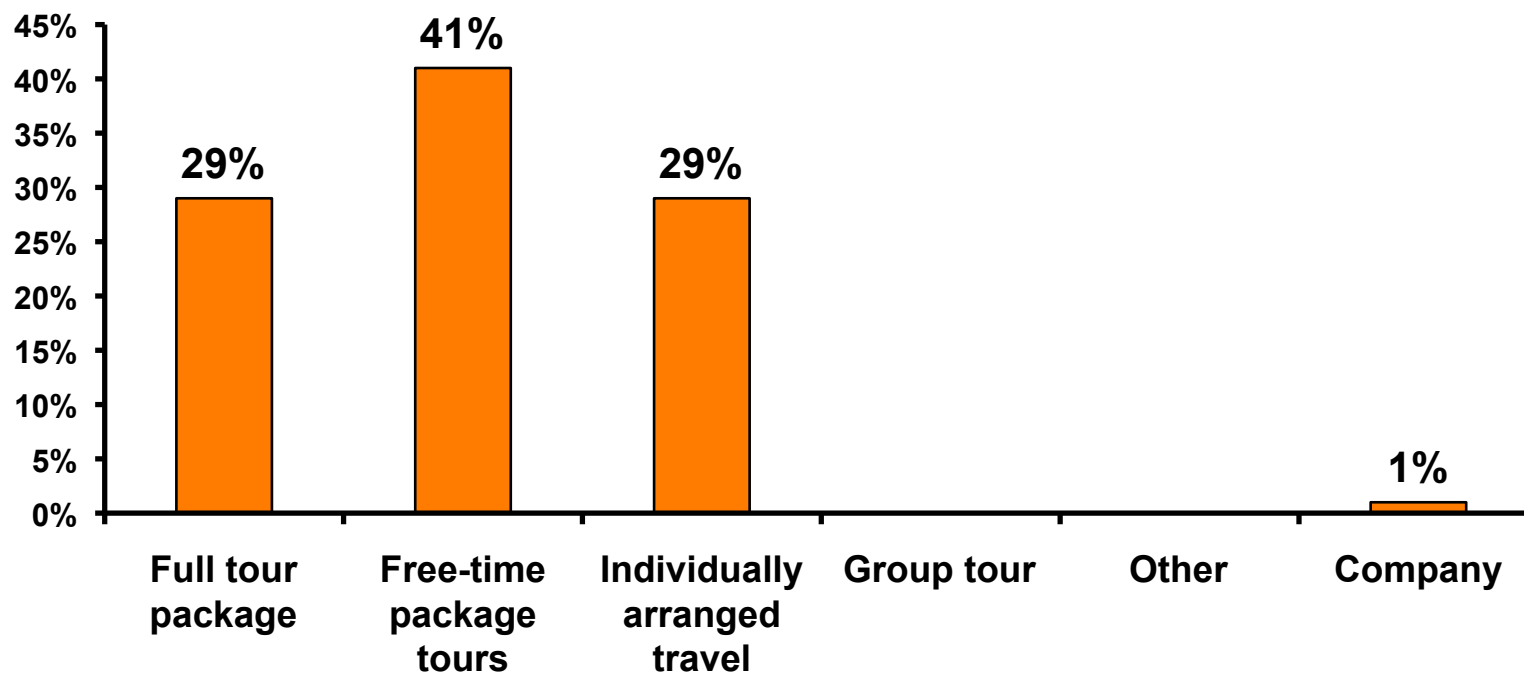


# Occupation by Income

		TOTAL	Q26						
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+ No Income
Q25	Company: Office non-mgr	58%	33%	100%	38%	58%	81%	65%	8%
	Company: Salesperson	13%	17%		13%	26%	6%		42%
	Skilled worker	9%			13%	11%	9%	12%	
	Student	4%	17%						17%
	Prof-specialist	3%			13%			12%	8%
	Govt- Mgr/ Exec	3%			13%				
	Other	3%						6%	17%
	Retired	3%				5%	3%		8%
	Freelancer	2%	17%		13%				
	Govt- Office non-mgr	2%	17%						
	Govt- Executive	1%						6%	
	Total Count	120	6	2	8	19	32	17	12
									3

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



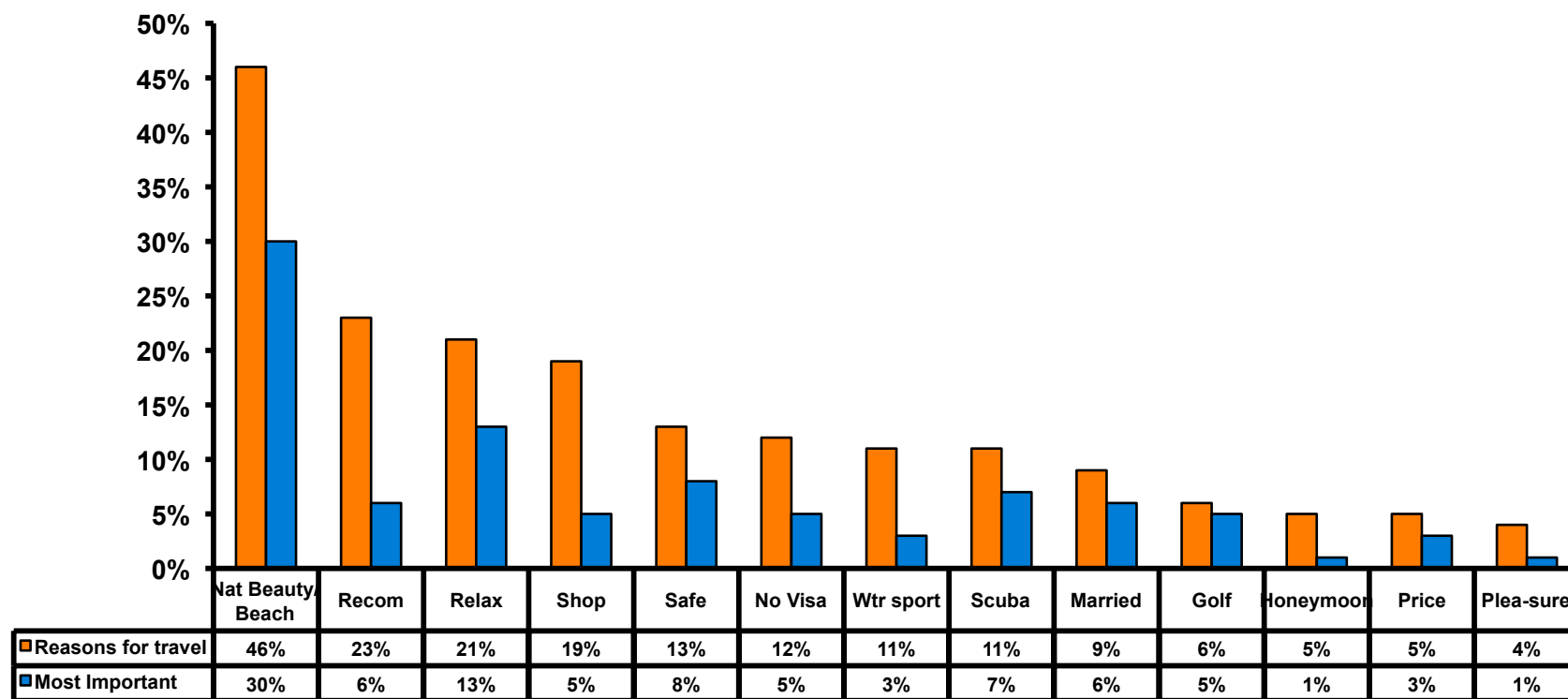
# Accommodation by Income

Average length of stay: 3.35 days

		TOTAL	Q26						
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+
Q9	Royal Orchid Guam	23%	20%	50%		16%	21%	35%	31%
	Fiesta Resort Guam	17%	60%		50%	32%	21%	12%	8%
	Hilton Guam Resort	10%				11%	12%	6%	
	Hotel Nikko Guam	9%			13%		15%	6%	8%
	Sheraton Laguna Guam	8%				5%	6%	12%	
	Hyatt Regency Guam	7%			13%	11%	6%	12%	15%
	Holiday Resort Guam	6%			13%	21%	3%	6%	
	PIC Club	5%			13%	5%	12%		
	Onward Beach Resort	4%						6%	
	Westin Resort Guam	3%		50%					8%
	Outrigger Guam Resort	3%	20%					6%	15%
	Hotel Santa Fe	1%							
	Guam Marriott Resort	1%							8%
	Oceanview Hotel	1%							
	Bayview Hotel	1%					3%		
	Leo Palace Resort	1%							8%
	Total	Count	149	5	2	8	19	33	17
									13
									3



# Travel Motivation - Top Responses



# **Most Important Reason for Choosing Guam**

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

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	46%	55%	43%	46%	75%	47%	44%
	Recomm- friend/family/trvl agnt	23%	36%	24%	21%		19%	29%
	Relax	21%	45%	26%	11%		21%	21%
	Shopping	19%	27%	22%	13%	25%	15%	24%
	Safe	13%	9%	14%	14%		12%	15%
	No Visa requirement	12%	9%	9%	18%		12%	12%
	Water sports	11%	9%	12%	13%		10%	13%
	Scuba	11%	36%	7%	11%	25%	11%	10%
	Married/ Attn wedding	9%		13%	2%	50%	5%	13%
	Golf	6%	9%	5%	4%	25%	5%	7%
	Honeymoon	5%		11%			7%	3%
	Price	5%	9%	5%	4%		2%	7%
	Pleasure	4%	9%	4%	4%		2%	6%
	Convention/ Trade/ Conference	4%		1%	9%		4%	4%
	Short travel time	3%		1%	7%		2%	4%
	Visit friends/ Relatives	2%	9%	1%	2%		1%	3%
	Previous trip	2%		1%	4%		1%	3%
	Career Cert/ Testing	1%	18%					3%
	Company Sponsored	1%		1%	2%		2%	
	Company/ Business Trip	1%			4%		1%	1%
	Total Count	149	11	76	56	4	81	68

# Motivation by Income

		TOTAL	Q26							
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income
Q5A	Natural beauty	46%	50%	100%	100%	47%	39%	47%	54%	33%
	Recomm- friend/family/trvl agnt	23%	83%	100%	43%	32%	18%	24%	31%	
	Relax	21%	17%	100%	29%	26%	9%	12%	31%	33%
	Shopping	19%	50%	50%	43%	16%	12%	24%	38%	33%
	Safe	13%		50%	29%	11%	9%	12%	15%	
	No Visa requirement	12%	17%		29%	5%	15%	12%	8%	
	Water sports	11%	33%		29%	26%	9%	6%	8%	
	Scuba	11%	67%				12%	6%	8%	
	Married/ Attn wedding	9%		50%	29%	16%	9%	18%	8%	
	Golf	6%				11%	6%			
	Honeymoon	5%	17%		14%	5%	9%		8%	
	Price	5%	17%	50%		5%	3%	6%	8%	
	Pleasure	4%	17%		14%	5%				
	Convention/ Trade/ Conference	4%					3%	12%		
	Short travel time	3%							23%	
	Visit friends/ Relatives	2%	17%				3%		8%	
	Previous trip	2%					3%		8%	
	Career Cert/ Testing	1%							15%	
	Company Sponsored	1%				5%				
	Company/ Business Trip	1%				11%				
	Total Count	149	6	2	7	19	33	17	13	3

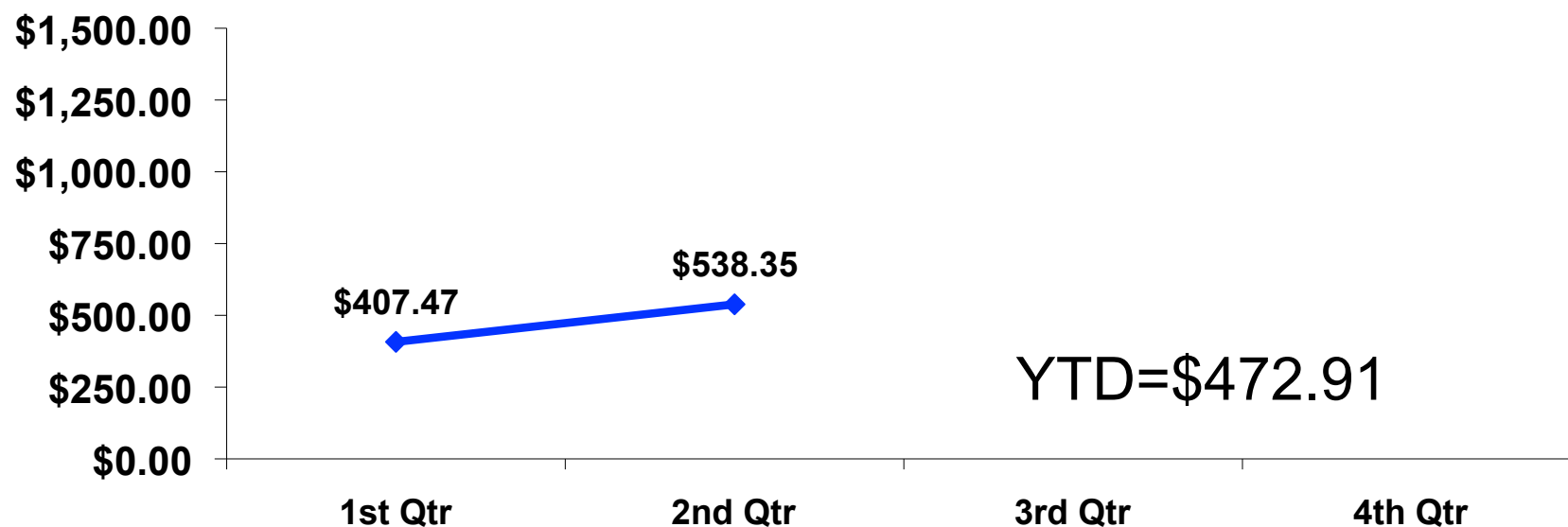
# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures

TWD29.44/US\$1

- \$1,062.12 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$16,984 = maximum (highest amount recorded for the entire sample)
- \$538.35 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person



# Breakdown of Prepaid Expenditures

**TWD29.44=\$1**

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

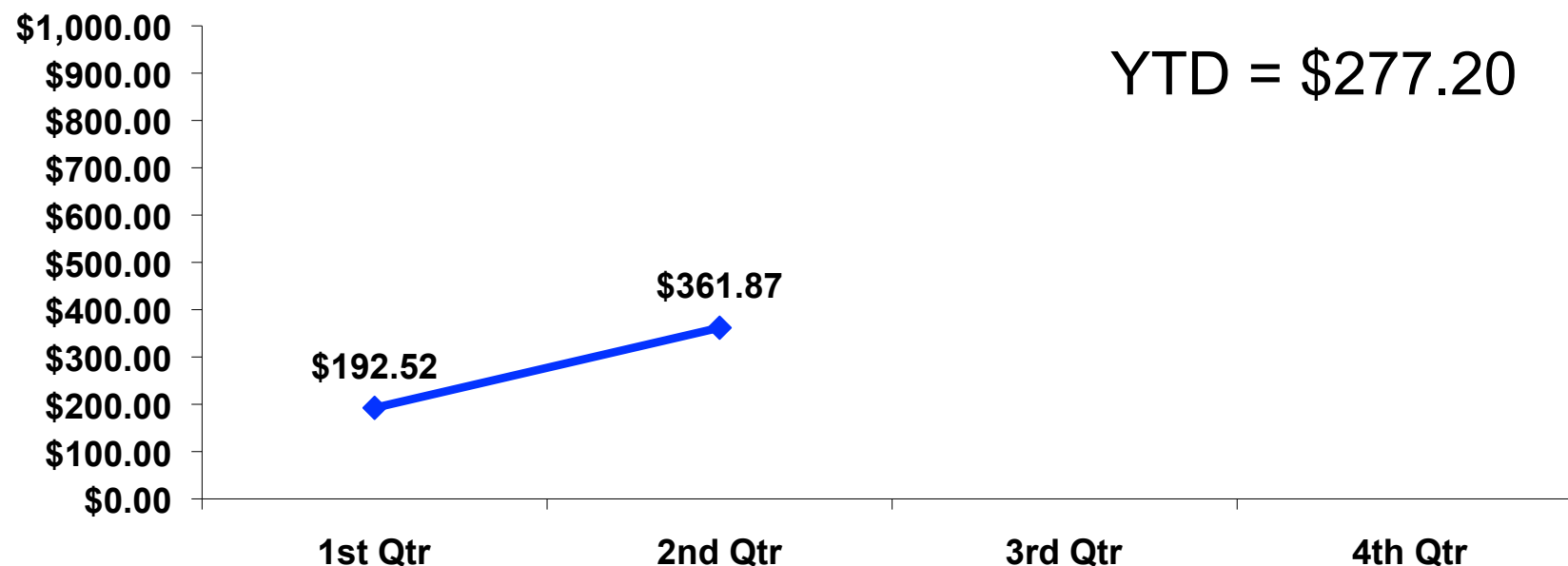
	MEAN \$
Air & Accommodation package only	\$1,268.60
Air & Accommodation w/ daily meal package	\$1,338.26
Air only	\$5,640.29
Accommodation only	\$2,672.10
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation- Taiwan	\$83.61
Ground transportation- Guam	\$-
Optional tours/ activities	\$725.34
Other expenses	\$1,508.74
Total Prepaid	\$1,062.12



# On-Island Expenditures

- \$617.96 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,333 = Maximum (highest amount recorded for the entire sample)
- \$361.87 = overall mean average per person on-island expenditure

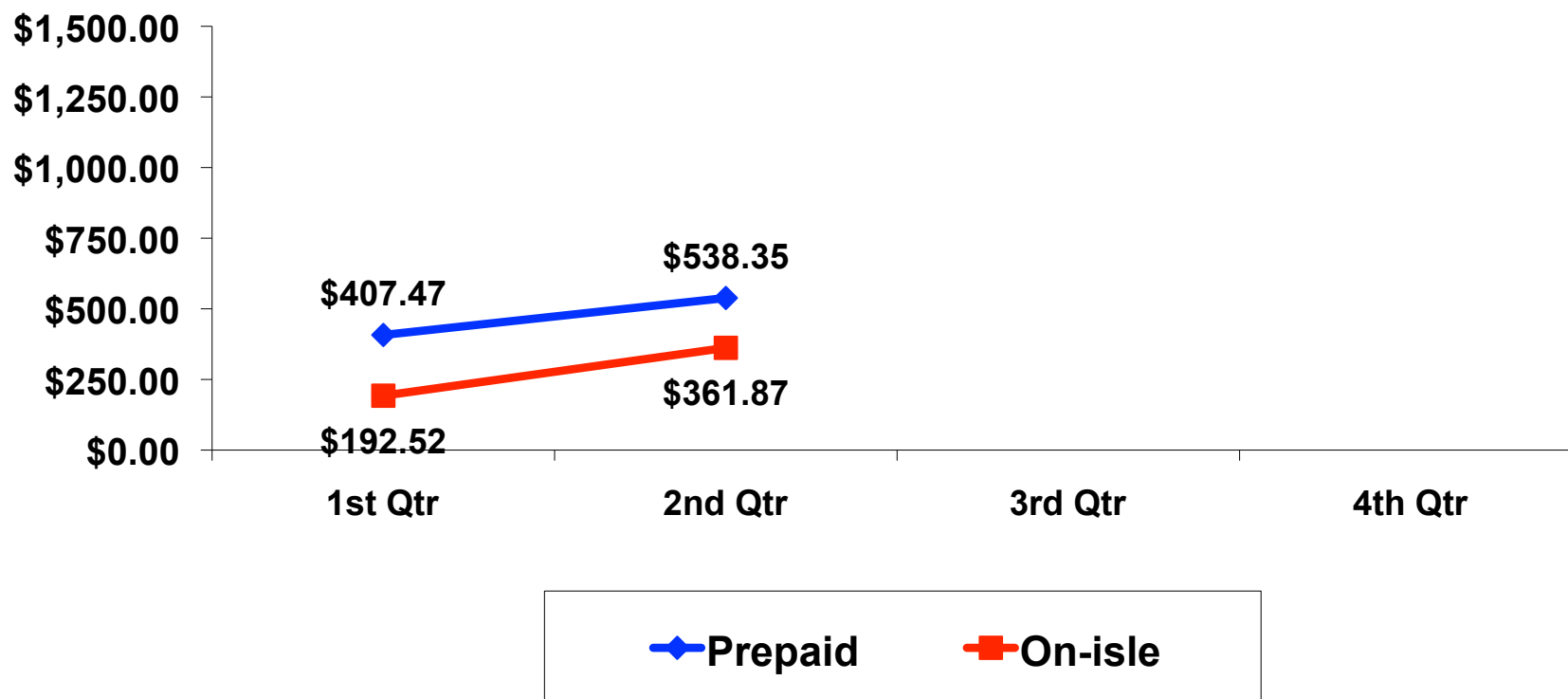
# On-Island Expenditures Per Person



# Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$472.91

On-Island YTD = \$277.20



# 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	\$361.87	\$330.62	\$399.56	\$301.25	\$382.18	\$286.07	\$199.04	\$657.14	\$397.28	\$316.00	.
	Median	\$250	\$235	\$250	\$338	\$51	\$278	\$148	\$674	\$213	\$250	.
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$450	\$0	\$0	.
	Maximum	\$3,150	\$3,150	\$2,830	\$530	\$3,150	\$1,833	\$500	\$1,000	\$2,830	\$1,120	.

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$28.66	\$32.26	\$24.32	\$15.91	\$23.12	\$41.86	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$19.93	\$22.52	\$16.81	\$30.27	\$17.75	\$21.79	\$5.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$26.92	\$34.76	\$17.47	\$24.36	\$18.18	\$26.96	\$202.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$5
OPT TOUR	Mean	\$49.26	\$40.00	\$60.43	\$40.91	\$41.42	\$52.32	\$205.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$10
GIFT- SELF	Mean	\$174.37	\$133.85	\$223.24	\$125.45	\$201.19	\$145.84	\$54.25
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$25
GIFT- OTHER	Mean	\$68.29	\$52.65	\$87.15	\$164.18	\$64.38	\$61.25	\$12.50
	Median	\$0	\$0	\$0	\$40	\$0	\$0	\$0
TRANS	Mean	\$7.57	\$7.62	\$7.51	\$8.45	\$9.94	\$3.89	\$15.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$5
OTHER	Mean	\$241.69	\$273.72	\$203.06	\$118.18	\$164.35	\$383.89	\$200.00
	Median	\$0	\$0	\$0	\$0	\$0	\$40	\$0
TOTAL	Mean	\$617.96	\$600.67	\$638.81	\$527.73	\$543.83	\$736.38	\$694.25
	Median	\$390	\$344	\$455	\$530	\$250	\$550	\$500

# On-Island Expenditures

## First Timers & Repeaters

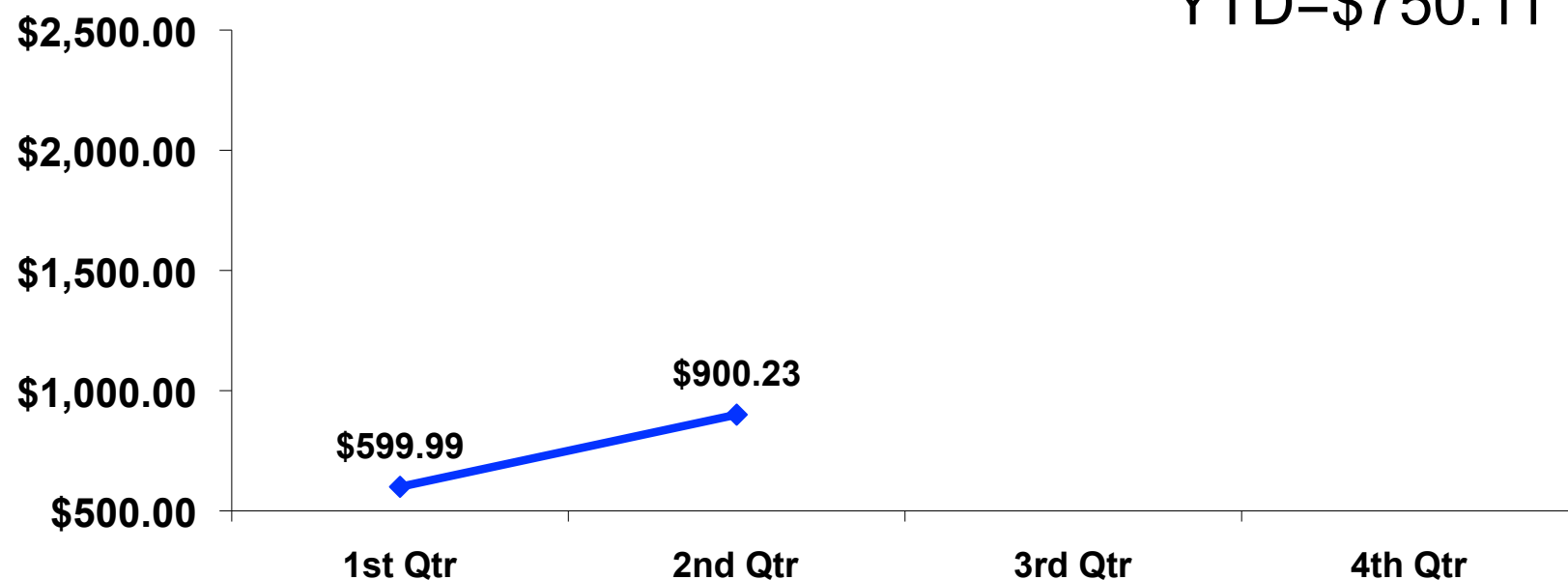
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$28.66	\$30.58	\$8.46
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$19.93	\$21.09	\$7.69
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$26.92	\$25.09	\$46.15
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$49.26	\$45.54	\$88.46
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$174.37	\$169.17	\$229.23
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$68.29	\$68.27	\$68.46
	Median	\$0	\$0	\$0
TRANS	Mean	\$7.57	\$7.07	\$12.92
	Median	\$0	\$0	\$0
OTHER	Mean	\$241.69	\$257.77	\$72.23
	Median	\$0	\$0	\$0
TOTAL	Mean	\$617.96	\$625.96	\$533.62
	Median	\$390	\$450	\$200

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

- \$900.23 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,861 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures Per Person

YTD=\$750.11



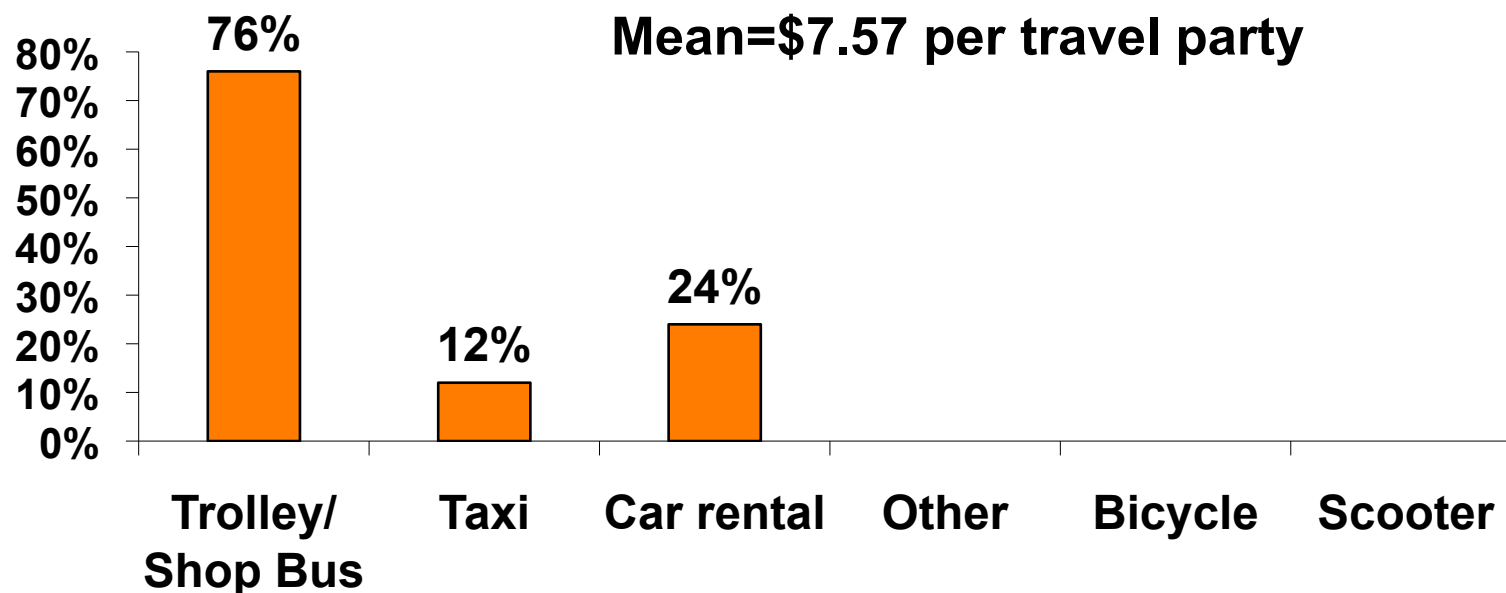


# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$28.66
Food & beverage in fast food restaurant/ convenience store	\$19.93
Food & beverage at restaurants or drinking establishments outside a hotel	\$26.92
Optional tours and activities	\$49.26
Gifts/ souvenirs for yourself/companions	\$174.37
Gifts/ souvenirs for friends/family at home	\$68.29
Local transportation	\$7.57
Other expenses not covered	\$241.69
<b>Average Total</b>	<b>\$617.96</b>

# Local Transportation

n=25



# Guam Airport Expenditures

- \$27.42 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,210 = Maximum (highest amount recorded for the entire sample)

# Breakdown of Airport Expenditures

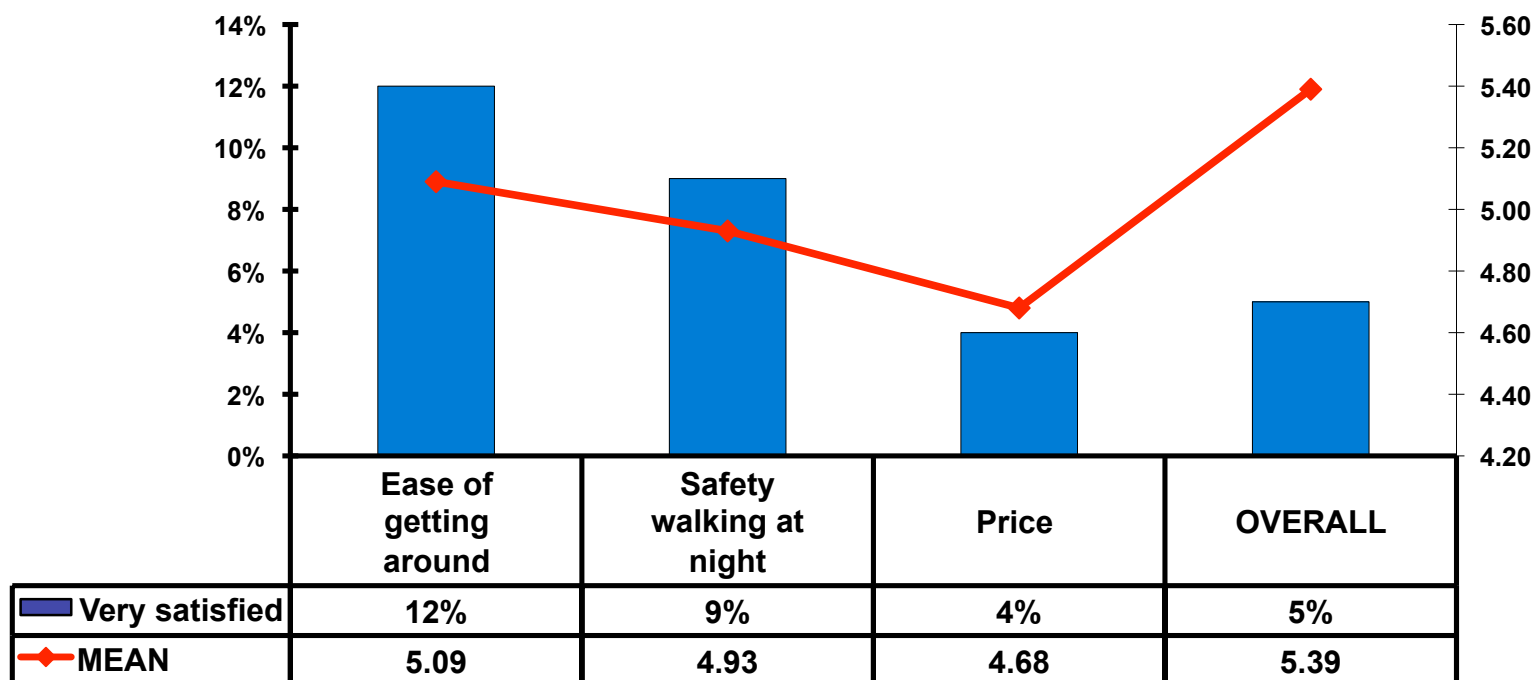
	MEAN \$
<b>Food &amp; Beverages</b>	\$2.61
<b>Gifts/Souvenirs Self</b>	\$21.78
<b>Gifts/Souvenirs Others</b>	\$3.04
<b>Total</b>	<b>\$27.42</b>

# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

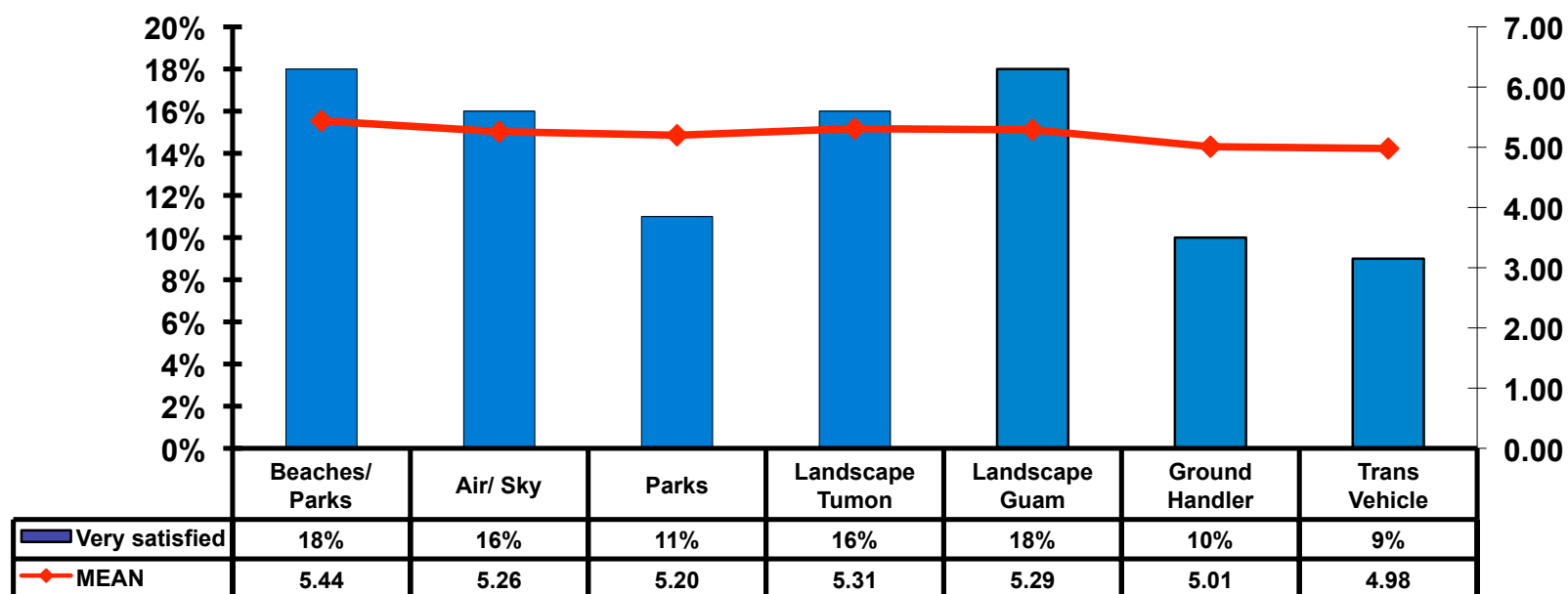
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

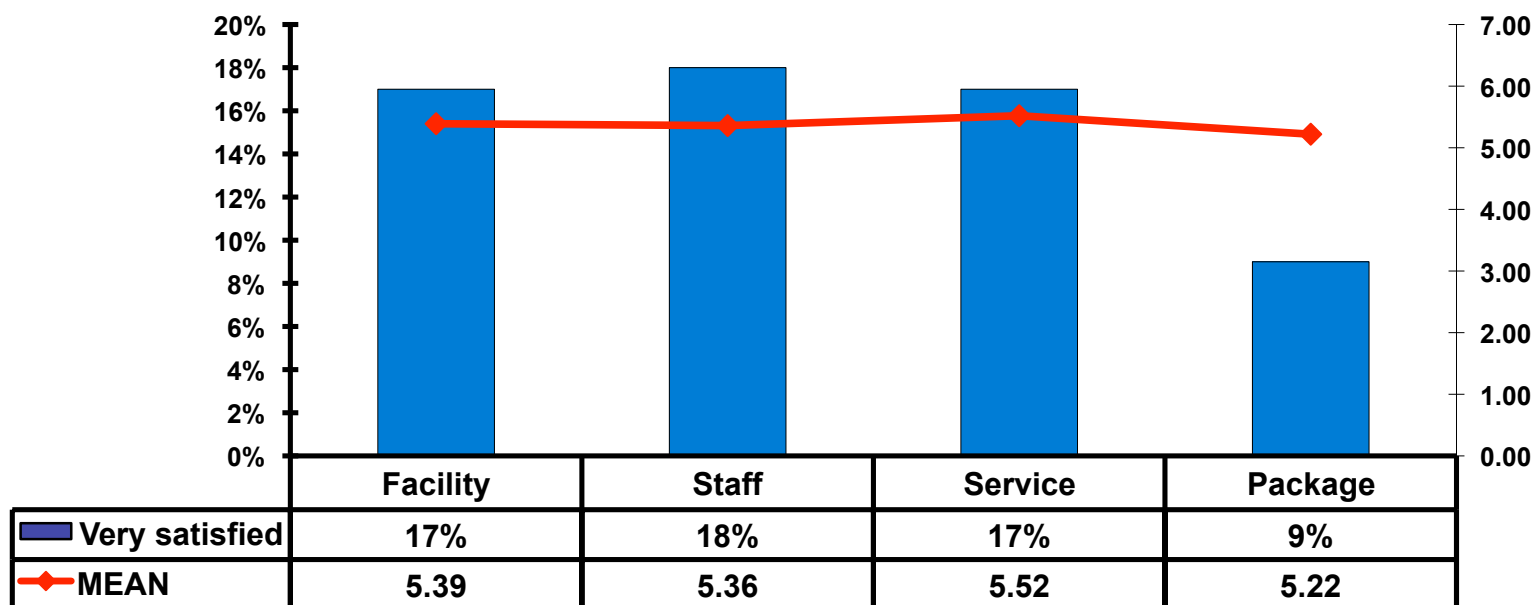
7=Very Satisfied/1=Very Dissatisfied



# Wedding Satisfaction Scores

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied

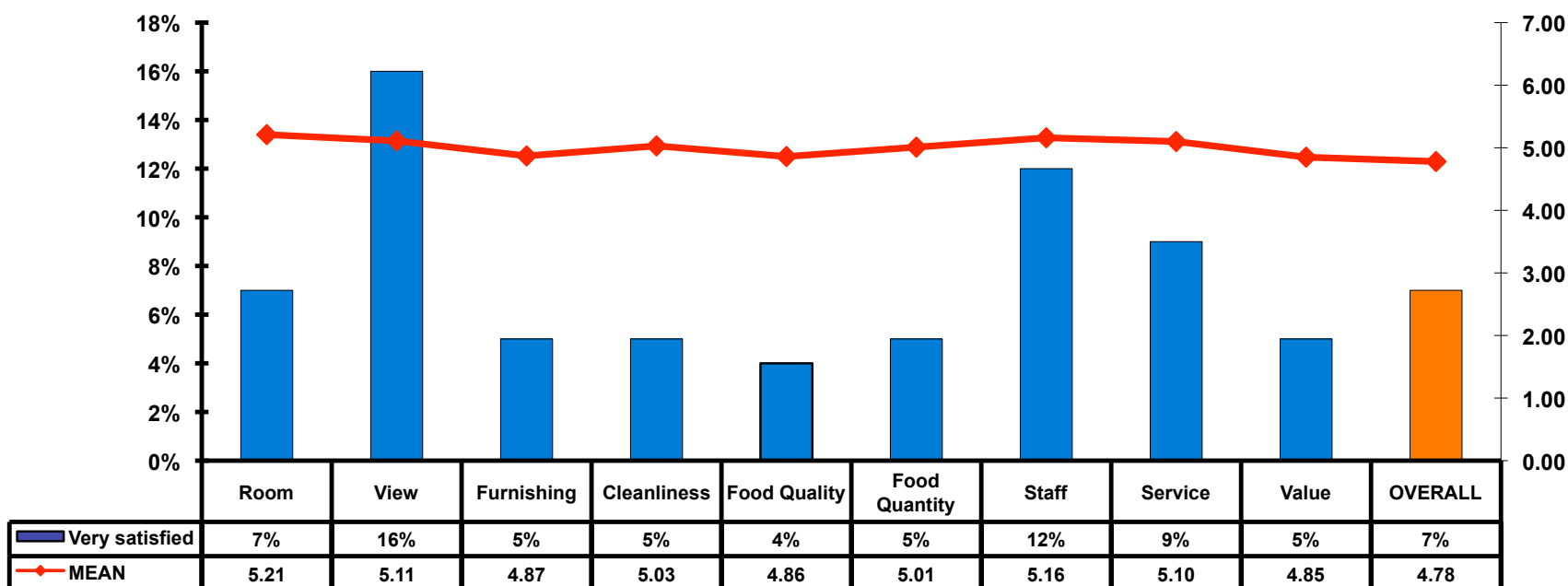




# Quality of Accommodations

7pt Rating Scale

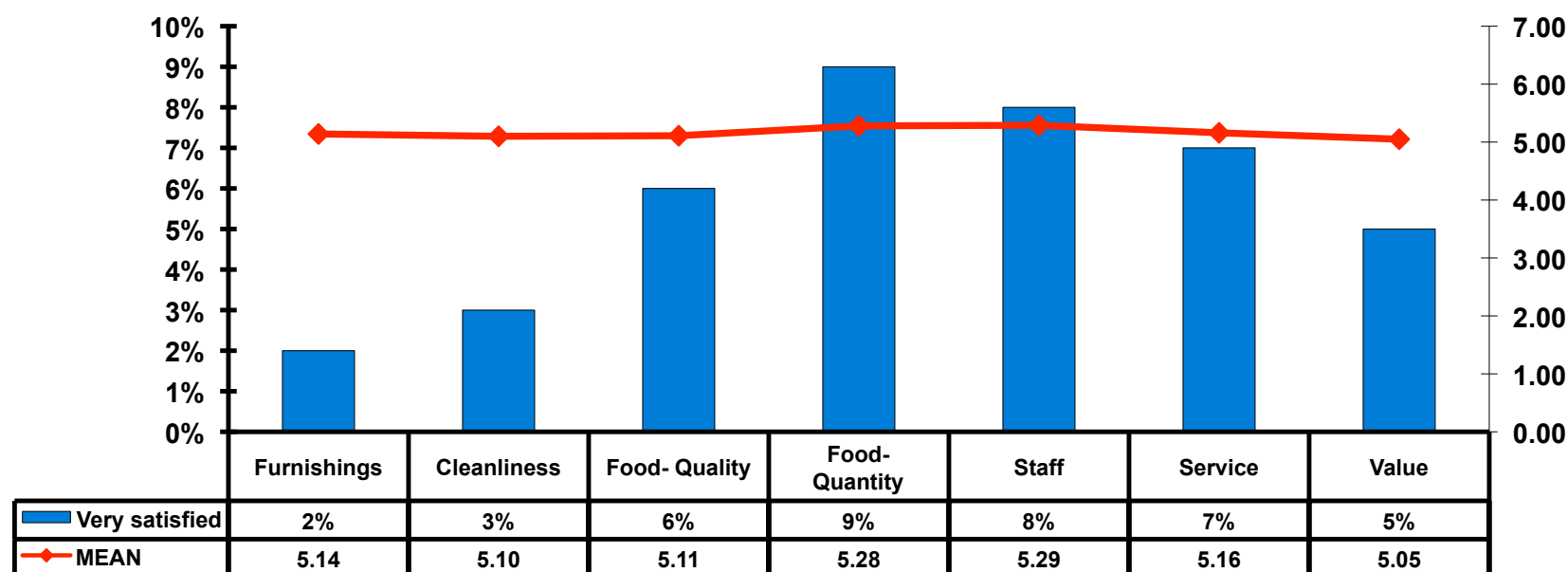
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

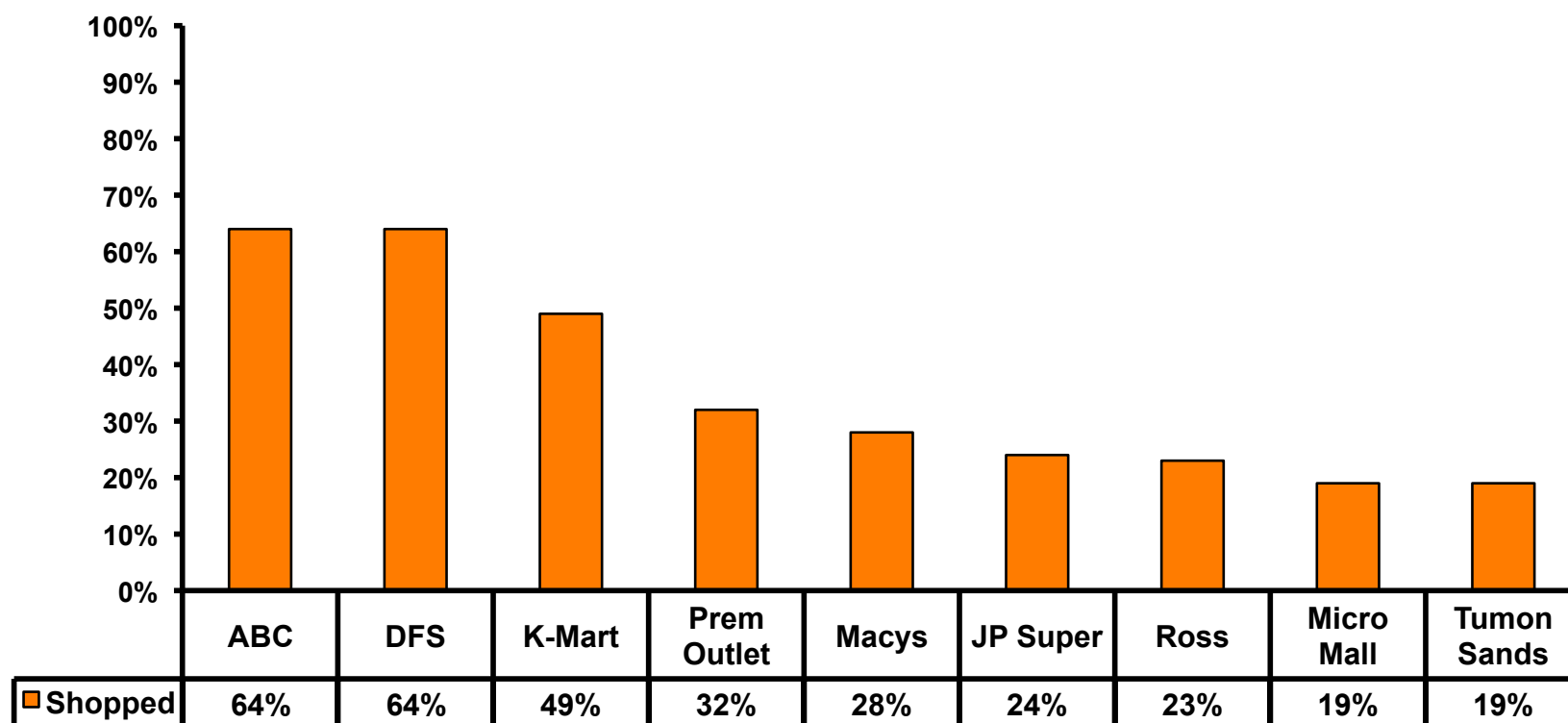
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



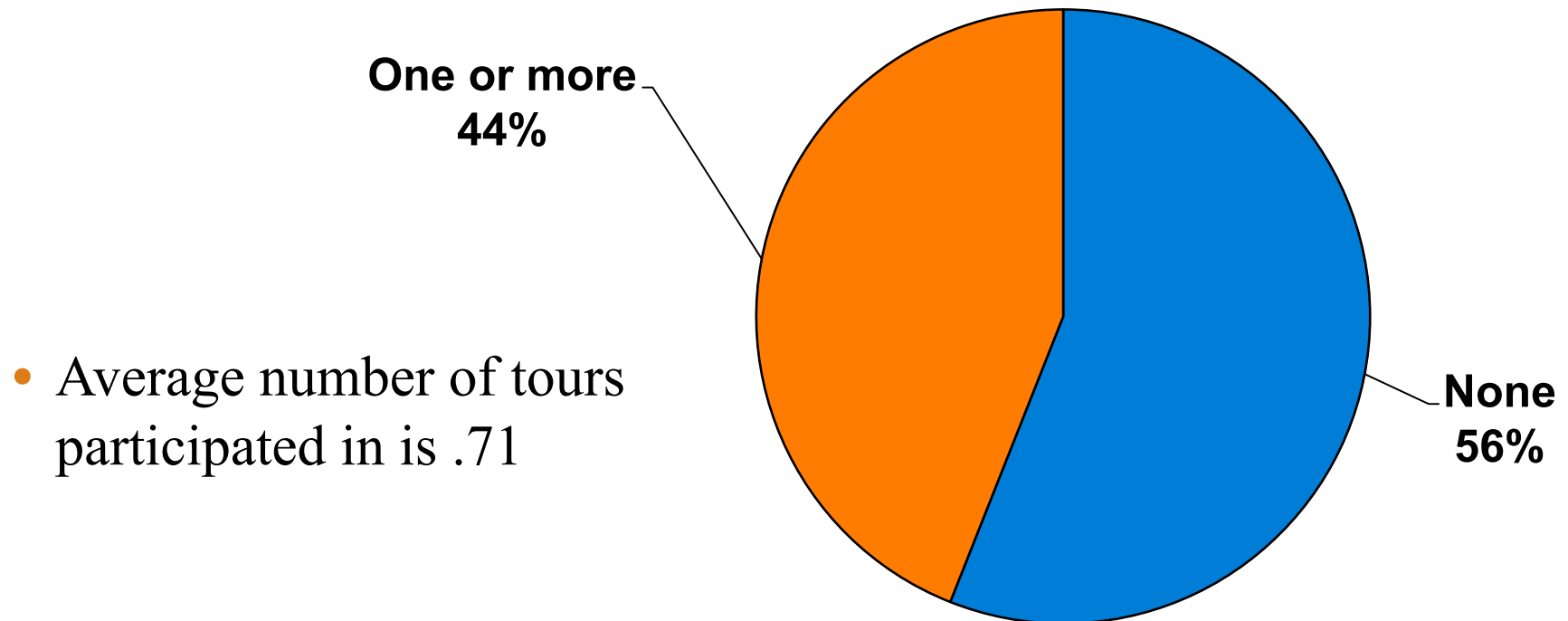
# Satisfaction with Shopping

**7pt Rating Scale**

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

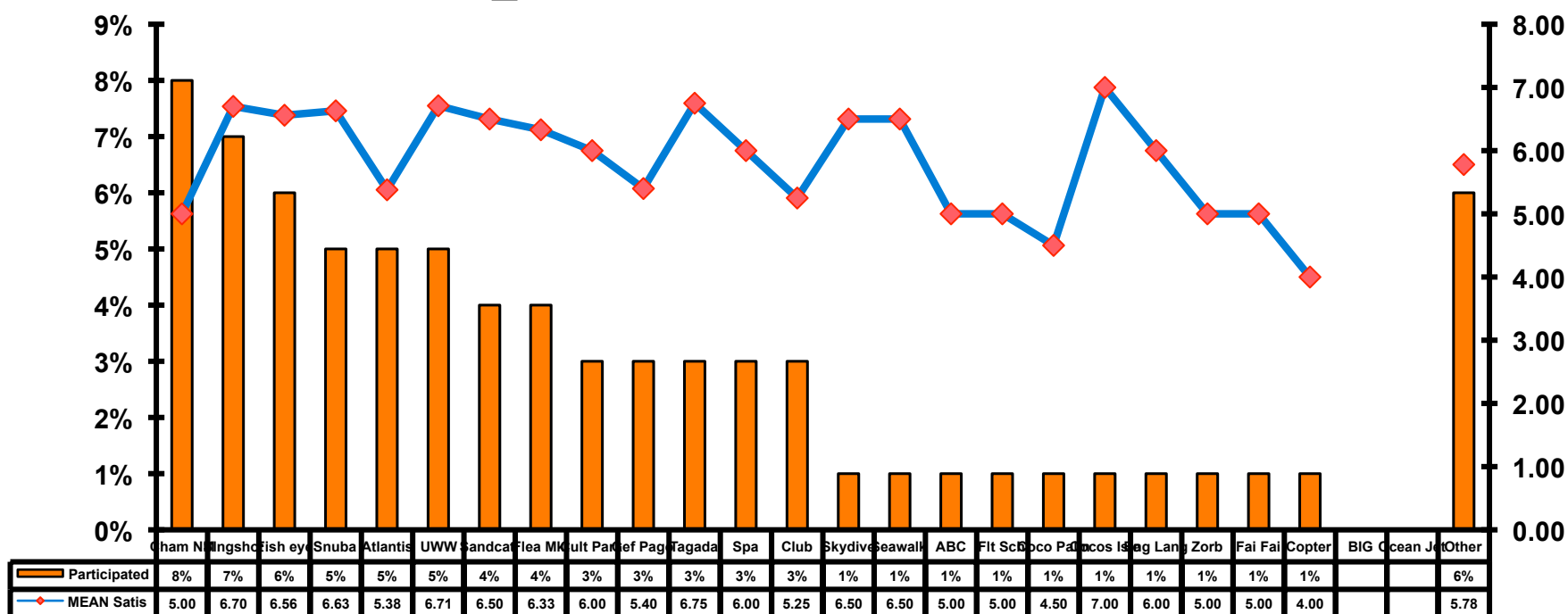
<b>Quality of Shopping</b>	<b>Variety of Shopping</b>
Score of 6 to 7 = <b>29%</b>	Score of 6 to 7 = <b>28%</b>
Score of 4 to 5 = <b>70%</b>	Score of 4 to 5 = <b>69%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>3%</b>
<b>MEAN = 5.08</b>	<b>MEAN = 5.07</b>

# 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 = <b>33%</b>	Score of 6 to 7 = <b>36%</b>
Score of 4 to 5 = <b>66%</b>	Score of 4 to 5 = <b>64%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 5.24</b>	<b>MEAN = 5.23</b>

# Night Tours Satisfaction

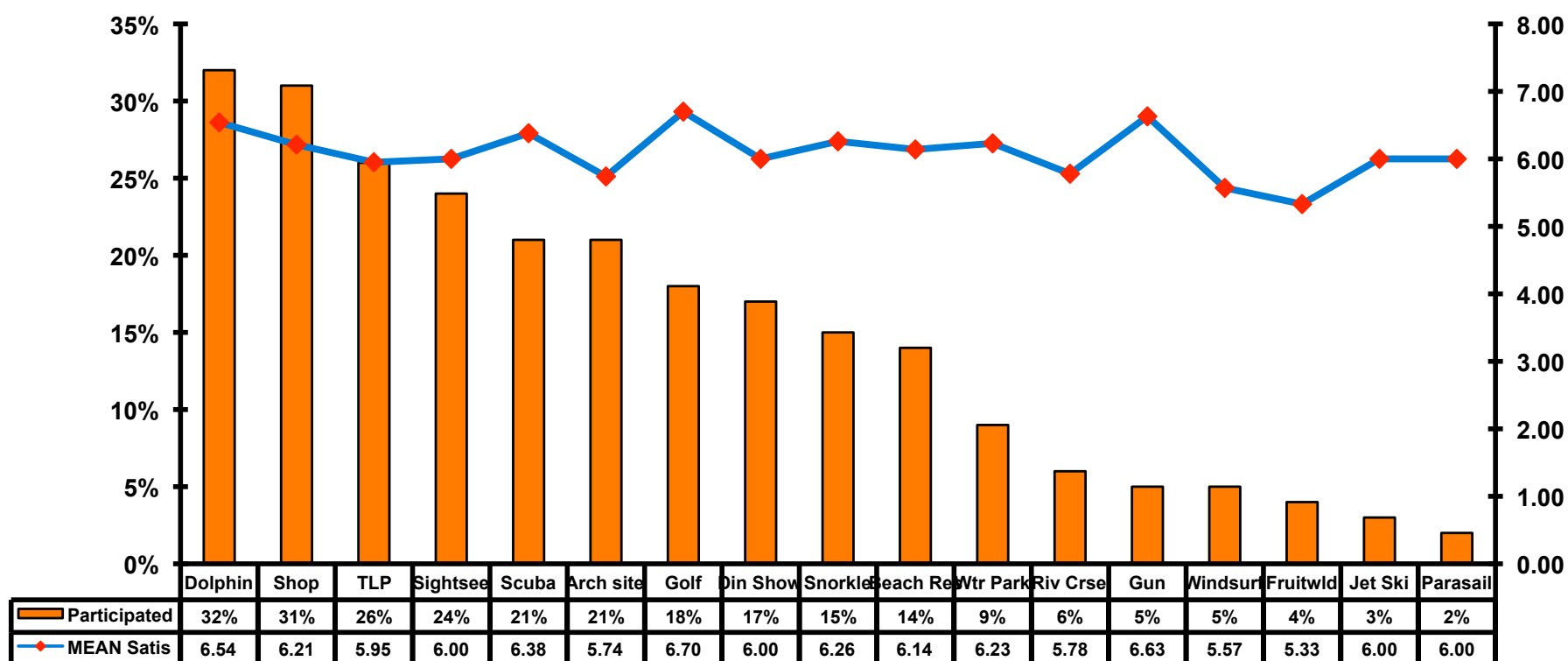
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

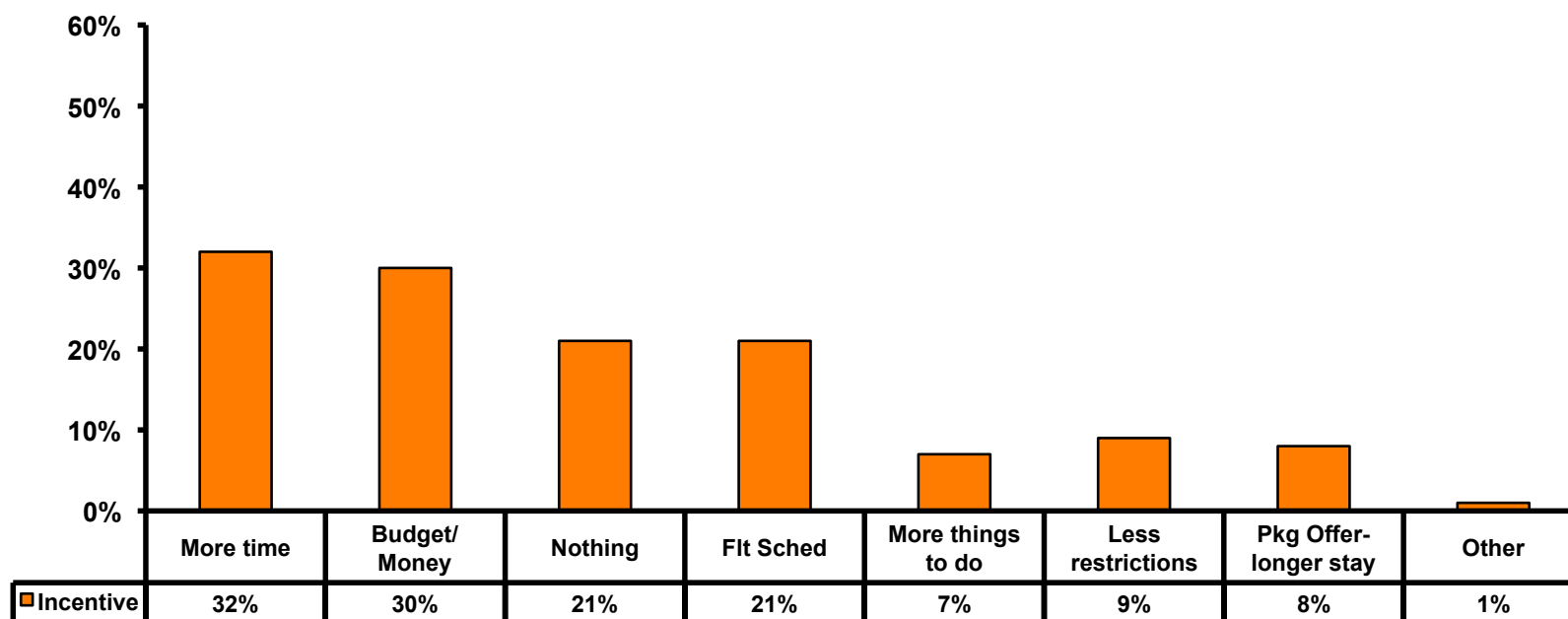
Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>21%</b>	Score of 6 to 7 = <b>19%</b>
Score of 4 to 5 = <b>78%</b>	Score of 4 to 5 = <b>80%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 4.99</b>	<b>MEAN = 4.89</b>



# Satisfaction with Other Activities



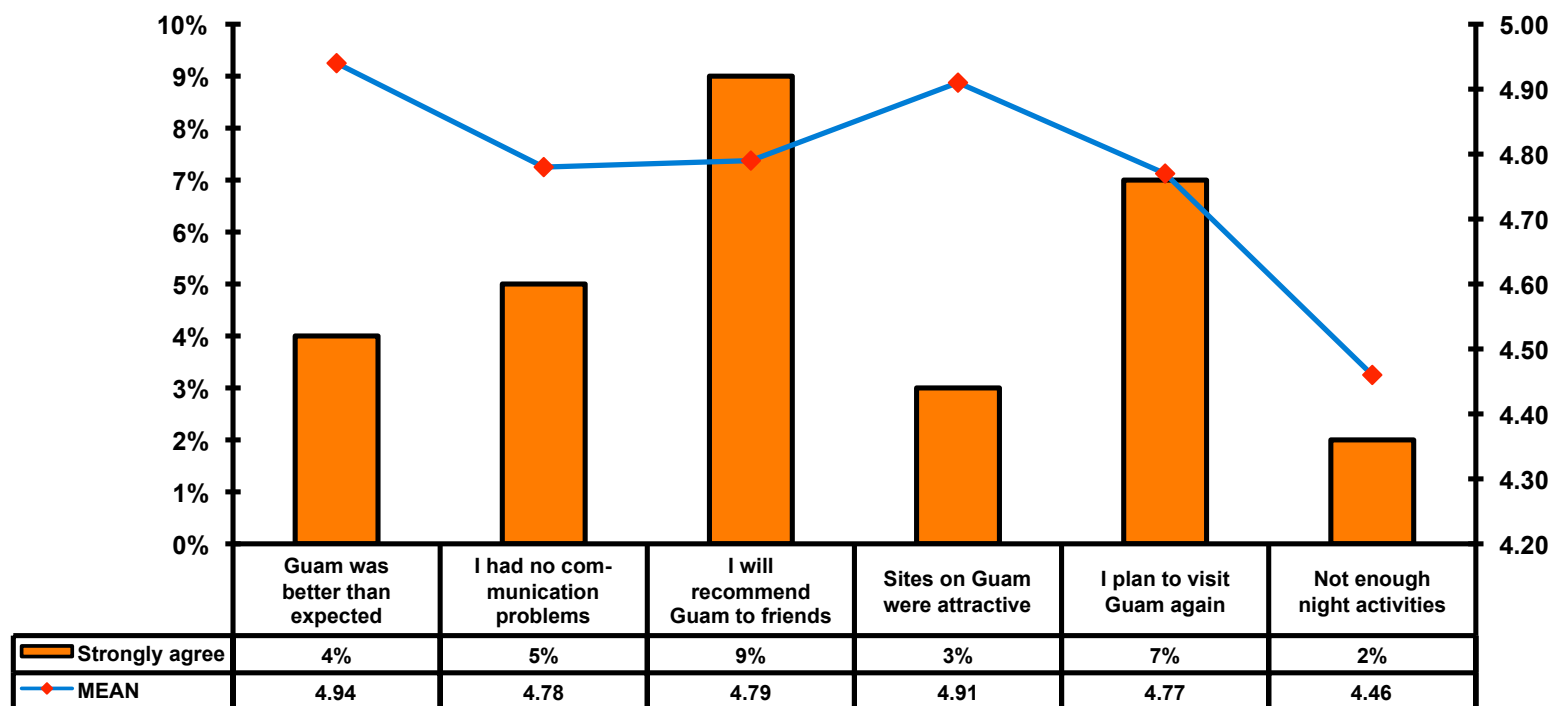
# What would it take to make you want to stay an extra day in Guam?



# On-Island Perceptions

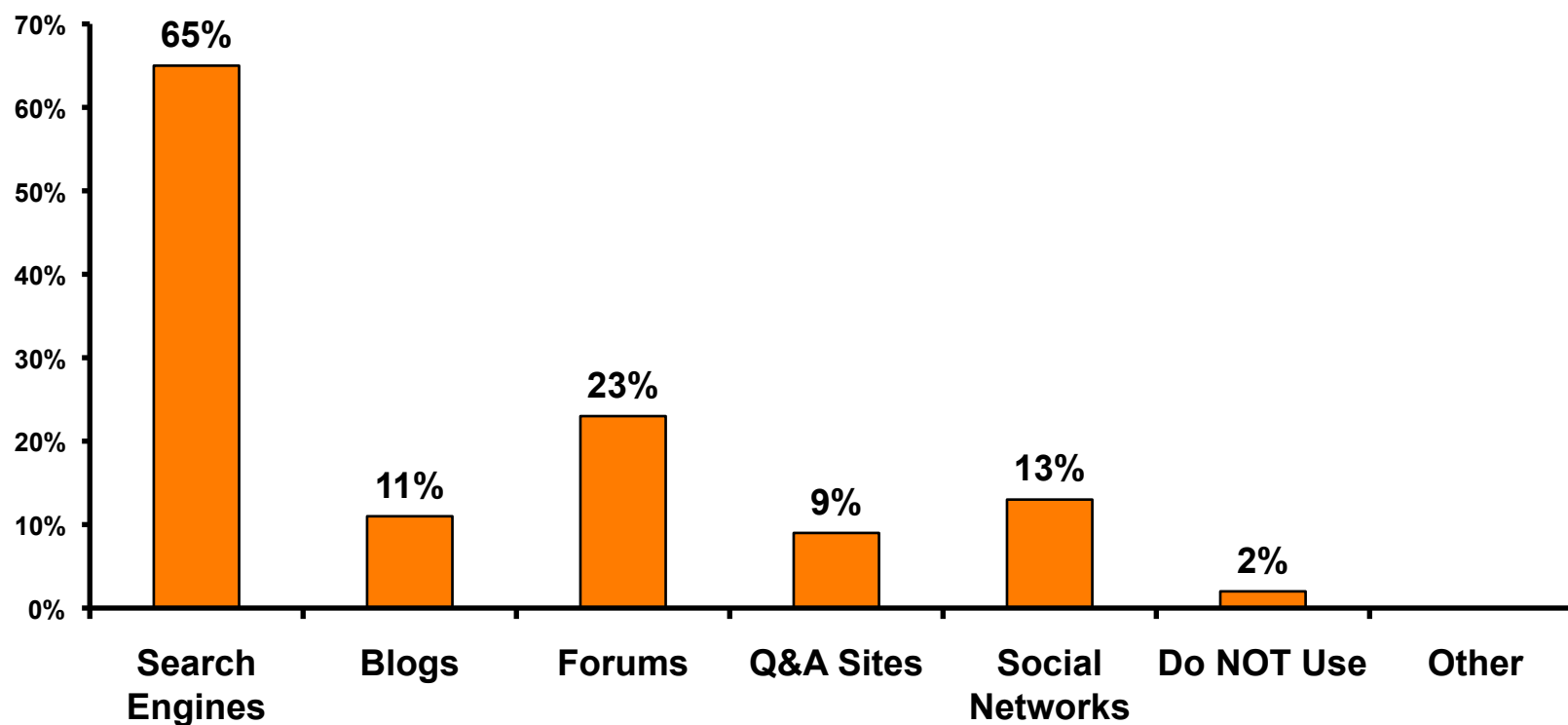
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



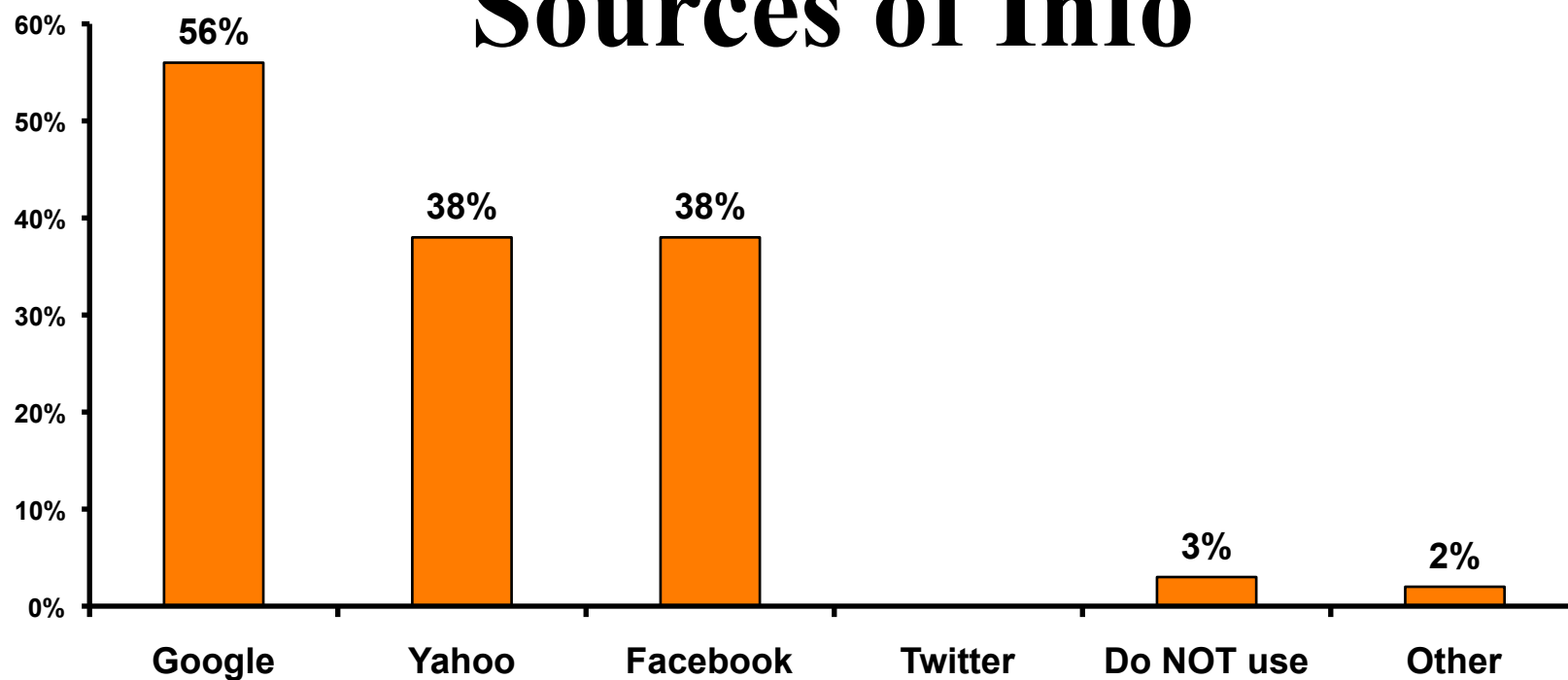
# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info

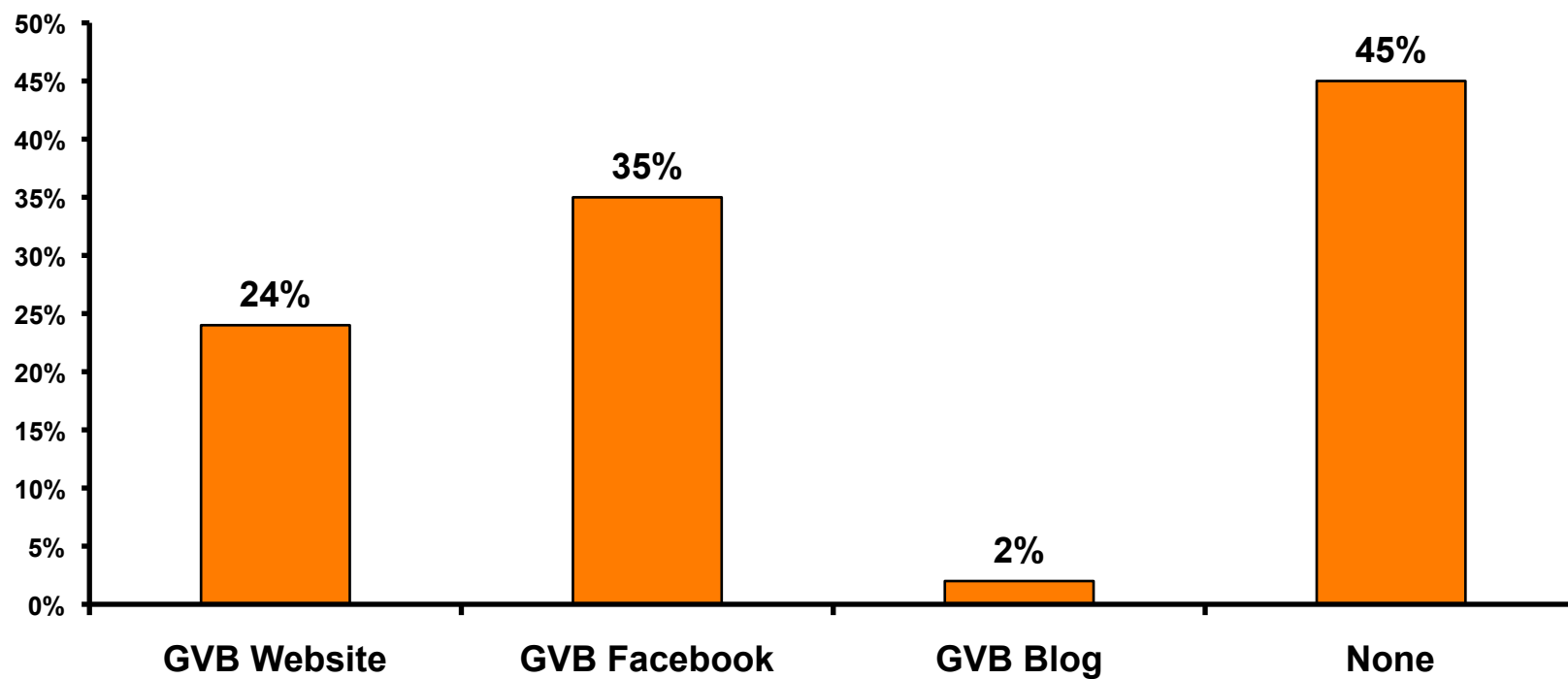


# Internet- Things To Do

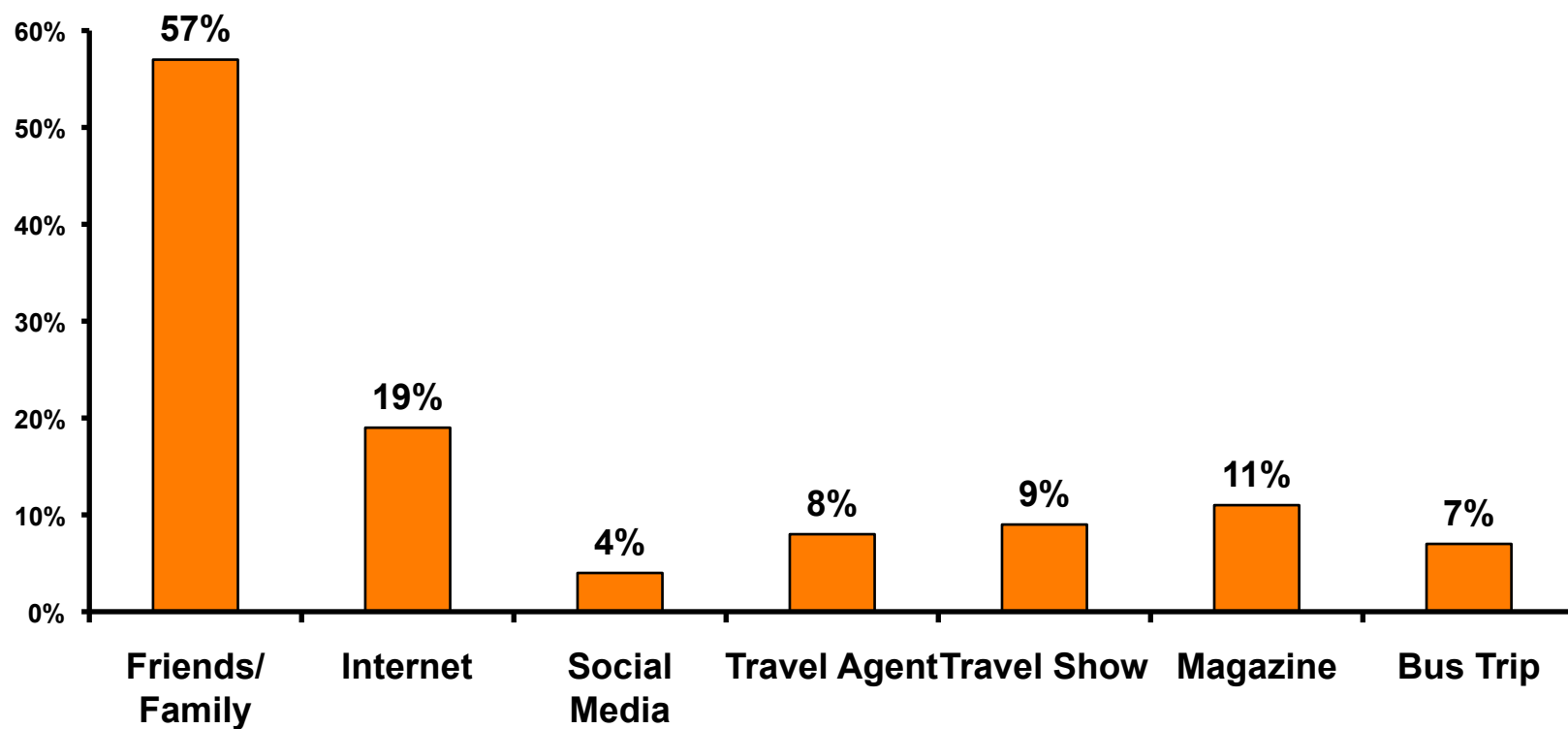
## Sources of Info



# Internet- GVB Sources



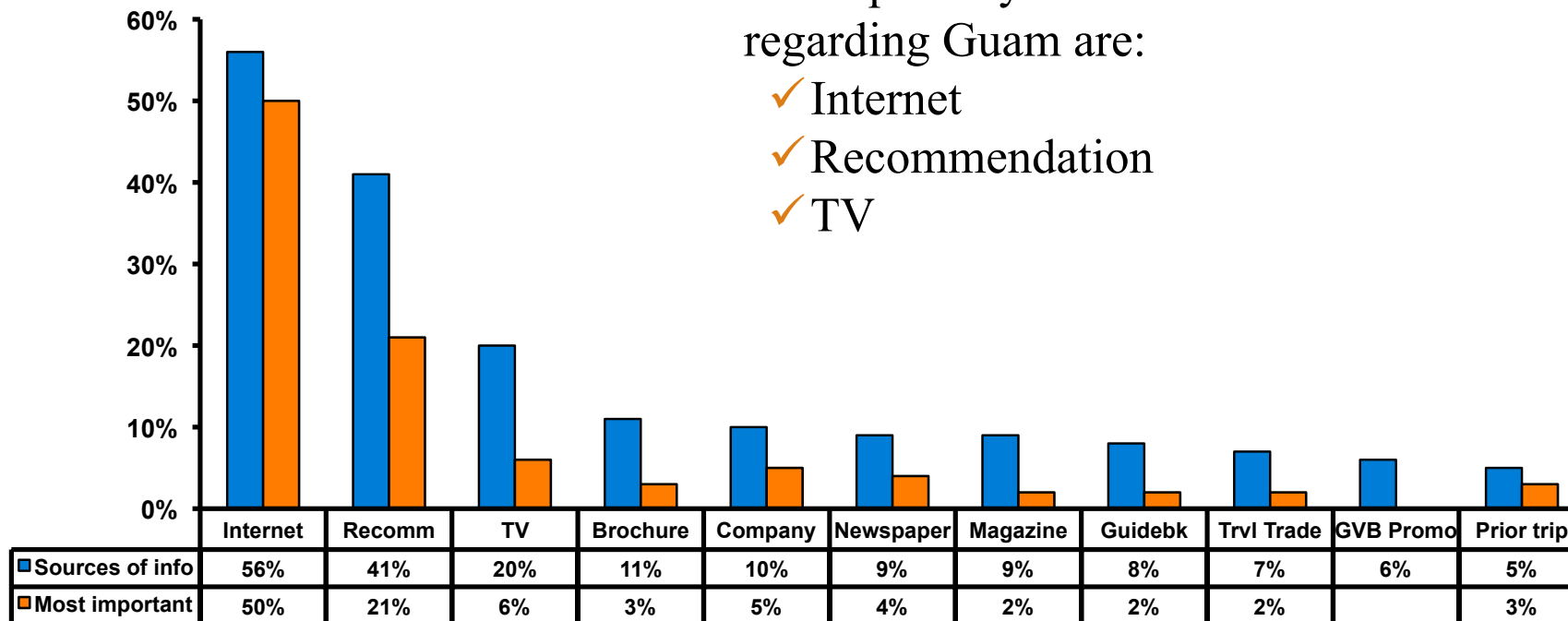
# Travel Motivation- Info Sources





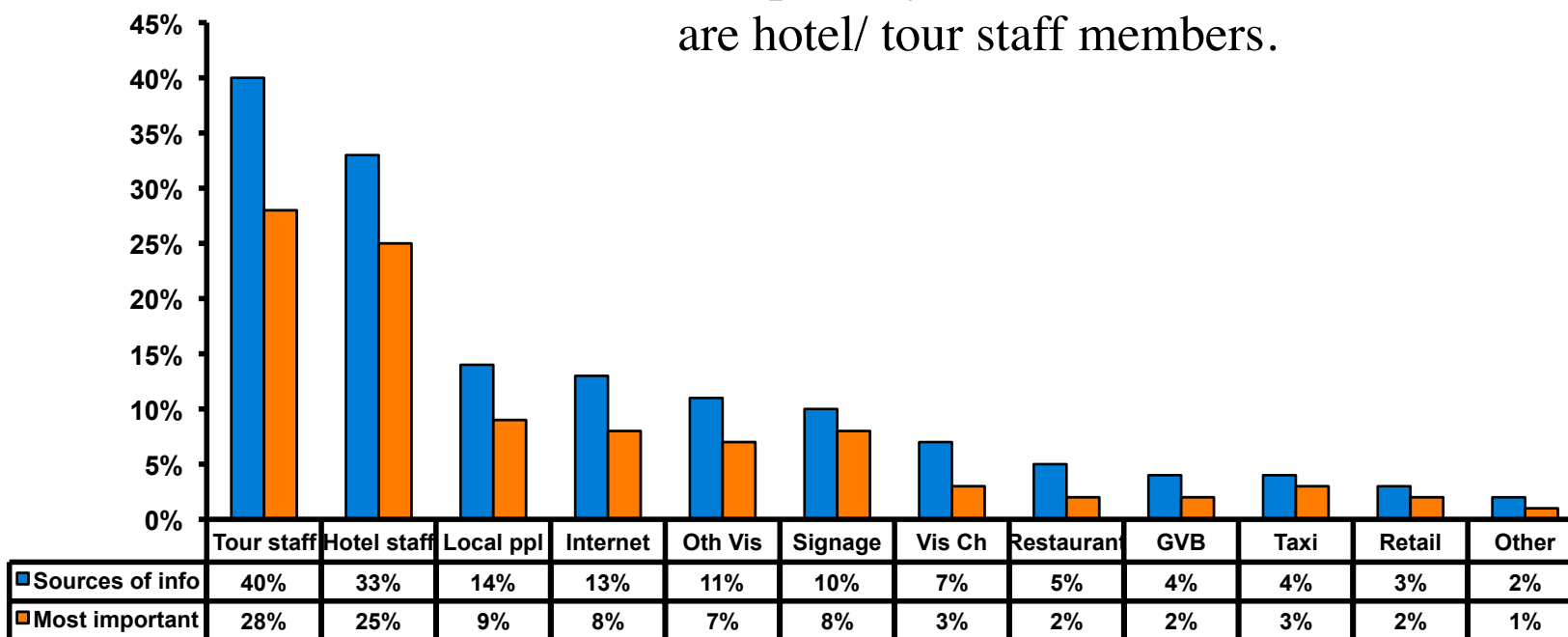
# Sources of Information Pre-arrival

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



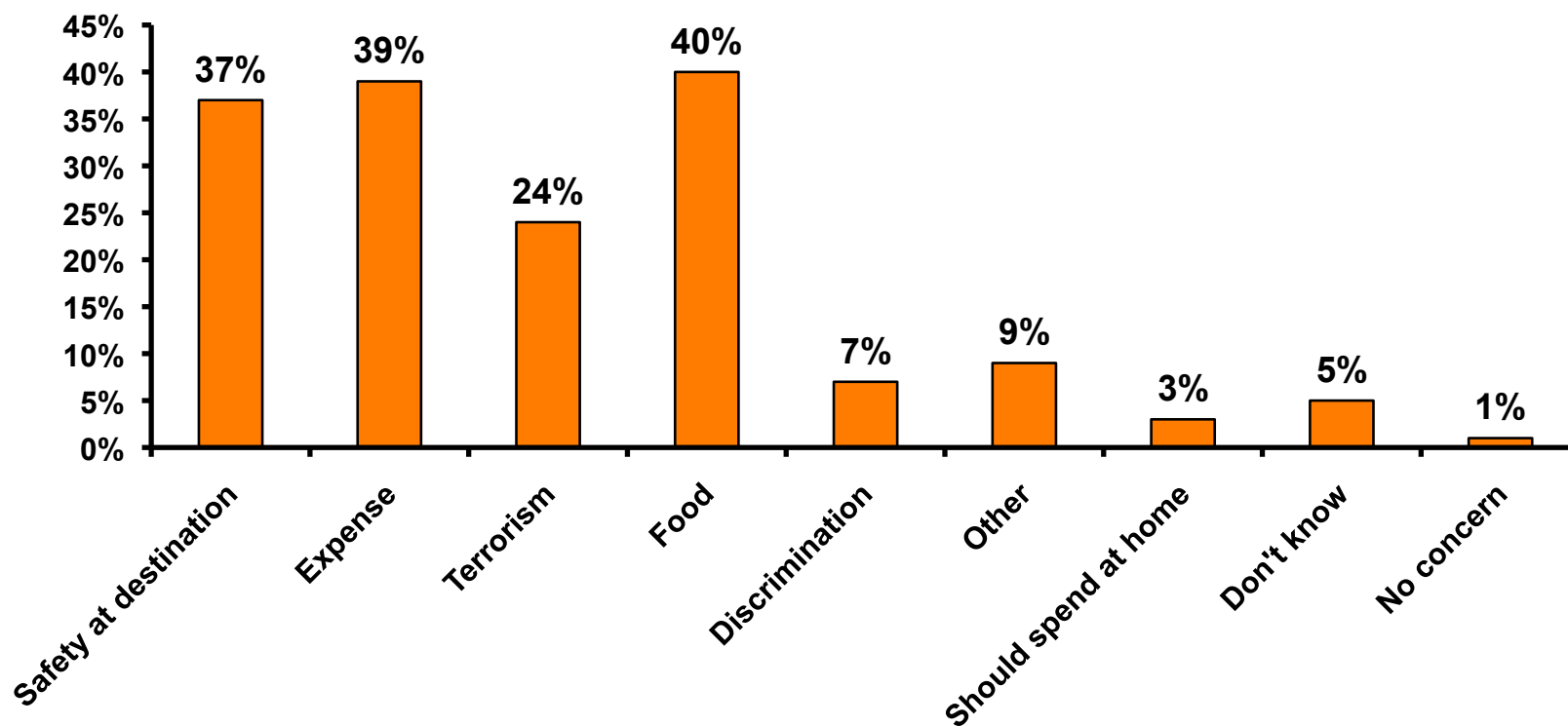
# Sources of Information Post-arrival

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



# SECTION 6 **OTHER ISSUES**

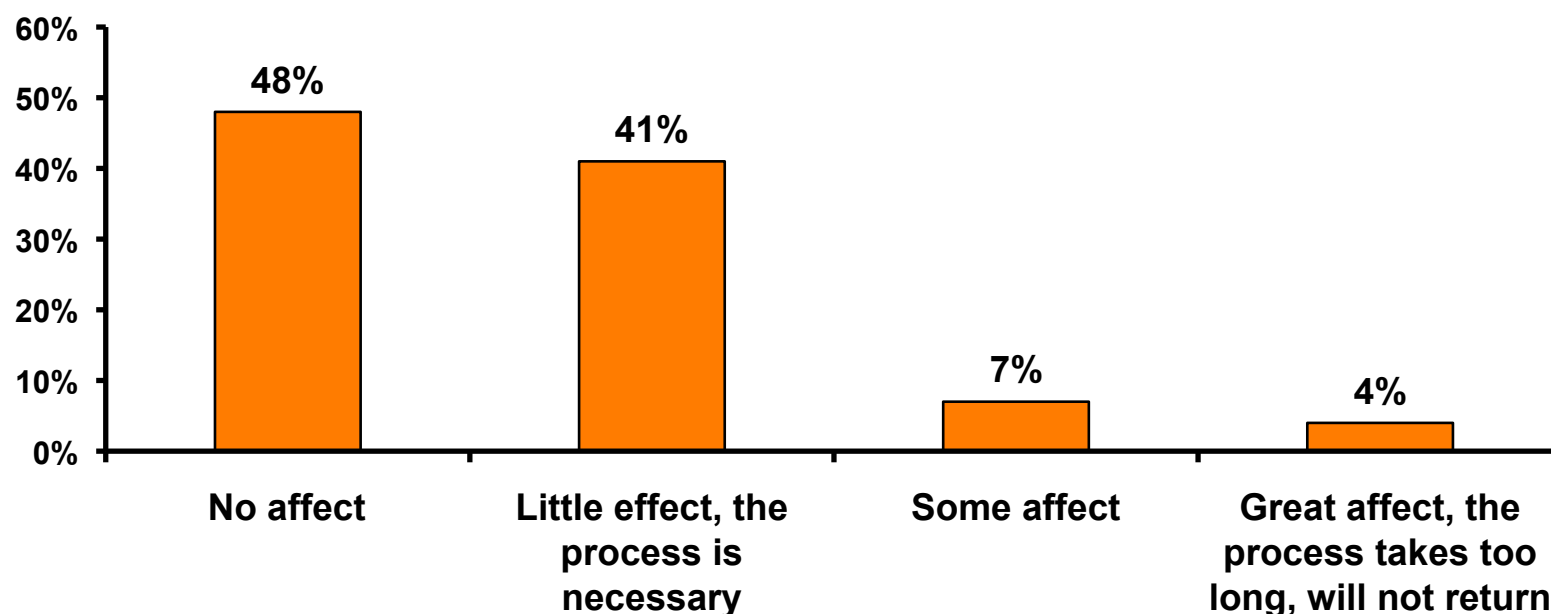
# Concerns about travel outside of Taiwan - Overall



# 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	Food	40%	55%	38%	42%	25%	67%	50%	63%	33%	42%	47%	54%	67%	
	Expense	39%	45%	43%	33%	25%	83%	50%	88%	50%	24%	47%	69%		
	Safety	37%	55%	39%	31%	25%	50%	100%	50%	61%	21%	41%	77%		
	Terrorism	24%	18%	21%	27%	25%	33%	50%		17%	36%	24%			
	Other	9%	27%	5%	11%	25%	17%	50%	13%	6%	6%	12%	8%		
	Discrimination against Japanese	7%	9%	7%	7%										
	Don't know	5%		3%	9%				13%	17%			8%		33%
	Should spend at home	3%		4%	4%						12%		8%		
	No concerns	1%				25%					3%				
	Total	Count	148	11	76	55	4	6	2	8	18	33	17		13

# Security Screening/ Immigration Process at Guam International Airport



# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

