



GUAM VISITORS BUREAU

Taiwan Visitor Tracker Exit Profile

FY2013 Market Segmentation

3RD Qtr. (APR~JUN 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

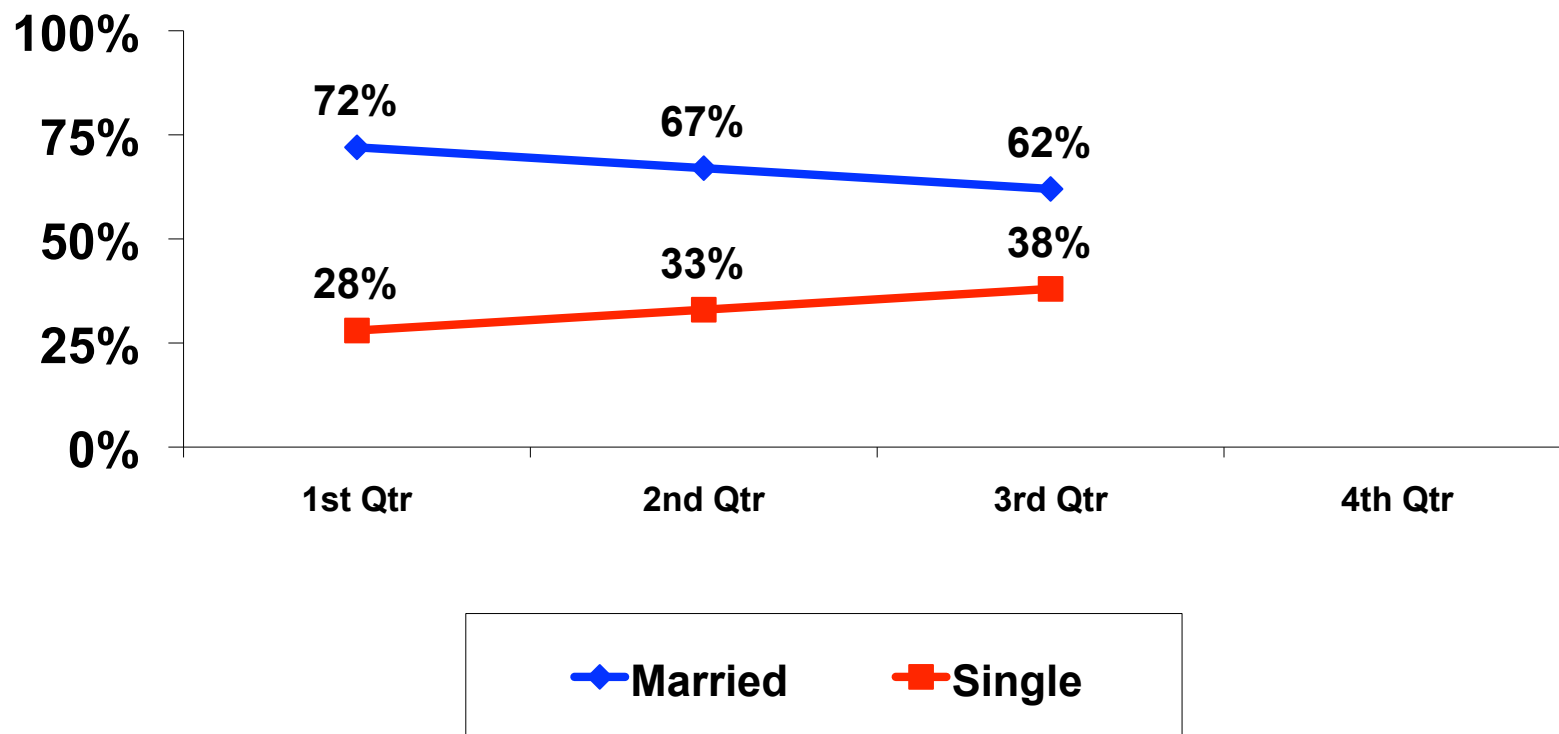
- General leisure group – Q.5A
- Family and/or Child – Q.6
- Special interest group – Q.18/Q7
- Incentive market – Q.5A/Q.7
- 20-40 year old – Q.F
- Mid-high level income – Q.26
- White-collar – Q.25
- W/child – Q.6
- Wedding/ Honeymoon – Q.5A/ Q.13
- Student –Q.25

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
General leisure group	23%	24%	35%	
Child	9%	17%	7%	
Incentive market	3%	3%	3%	
Male 20-40	39%	41%	43%	
Female 20-40	39%	41%	37%	
White collar	49%	53%	56%	
Wedding/ Honeymooner	9%	14%	8%	
Student	2%	3%	3%	
Mid-High income	26%	35%	43%	
TOTAL	154	150	150	

SECTION 1 **PROFILE OF RESPONDENTS**

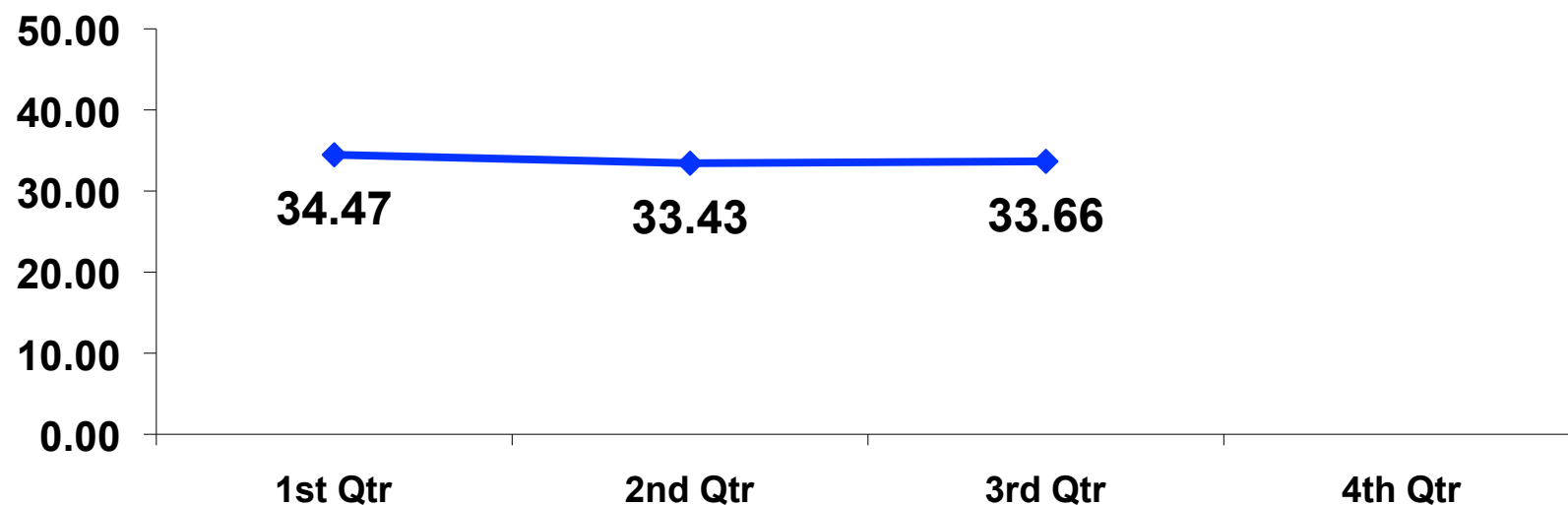
Marital Status Tracking



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	92	26	9	4	35	29	53	9	0	45
		Column N %	62%	50%	90%	100%	55%	52%	63%	75%	0%	69%
	Single	Count	57	26	1	0	29	27	31	3	5	20
		Column N %	38%	50%	10%	0%	45%	48%	37%	25%	100%	31%
	Total	Count	149	52	10	4	64	56	84	12	5	65

Average Age Tracking



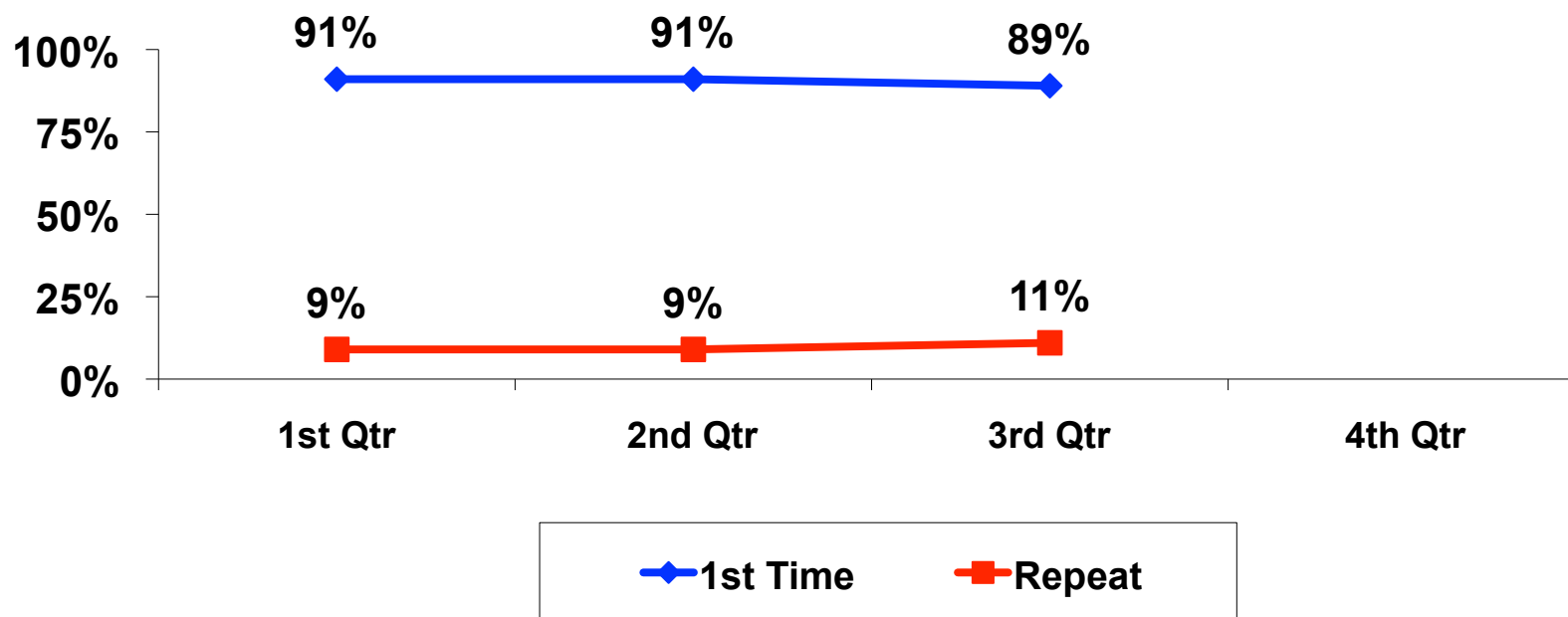
Age Segmentation

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	14	8	1	0	9	5	6	1	4	2
		Column N %	9%	15%	10%	0%	14%	9%	7%	8%	80%	3%
	25-34	Count	79	25	3	0	41	38	42	7	1	38
		Column N %	53%	48%	30%	0%	64%	68%	50%	58%	20%	58%
	35-49	Count	47	17	5	4	14	13	35	3	0	25
		Column N %	32%	33%	50%	100%	22%	23%	42%	25%	0%	38%
	50+	Count	8	2	1	0	0	0	1	1	0	0
		Column N %	5%	4%	10%	0%	0%	0%	1%	8%	0%	0%
	Total	Count	148	52	10	4	64	56	84	12	5	65
QF	Mean		33.66	33.00	37.00	43.50	30.53	30.46	33.75	34.50	22.20	33.23
	Median		32	31	37	44	31	31	33	32	21	33

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	4	0	0	0	1	2	2	1	0	0
		Column N %	4%	0%	0%	0%	2%	5%	3%	11%	0%	0%
	NT160K-NT200K	Count	4	2	0	0	0	4	3	1	0	0
		Column N %	4%	7%	0%	0%	0%	10%	4%	11%	0%	0%
	NT200K-NT400K	Count	4	2	0	0	1	3	4	0	0	0
		Column N %	4%	7%	0%	0%	2%	8%	6%	0%	0%	0%
	NT400K-NT600K	Count	20	4	1	0	12	7	19	4	0	20
		Column N %	20%	14%	13%	0%	27%	18%	28%	44%	0%	31%
	NT600K-NT800K	Count	45	14	4	2	20	18	29	1	1	45
		Column N %	45%	50%	50%	67%	44%	45%	42%	11%	33%	69%
	NT800K-NT1.0M	Count	8	1	1	1	3	2	5	1	1	0
		Column N %	8%	4%	13%	33%	7%	5%	7%	11%	33%	0%
	NT1.0M+	Count	14	5	2	0	8	4	7	1	1	0
		Column N %	14%	18%	25%	0%	18%	10%	10%	11%	33%	0%
Total	Count	99	28	8	3	45	40	69	9	3	65	

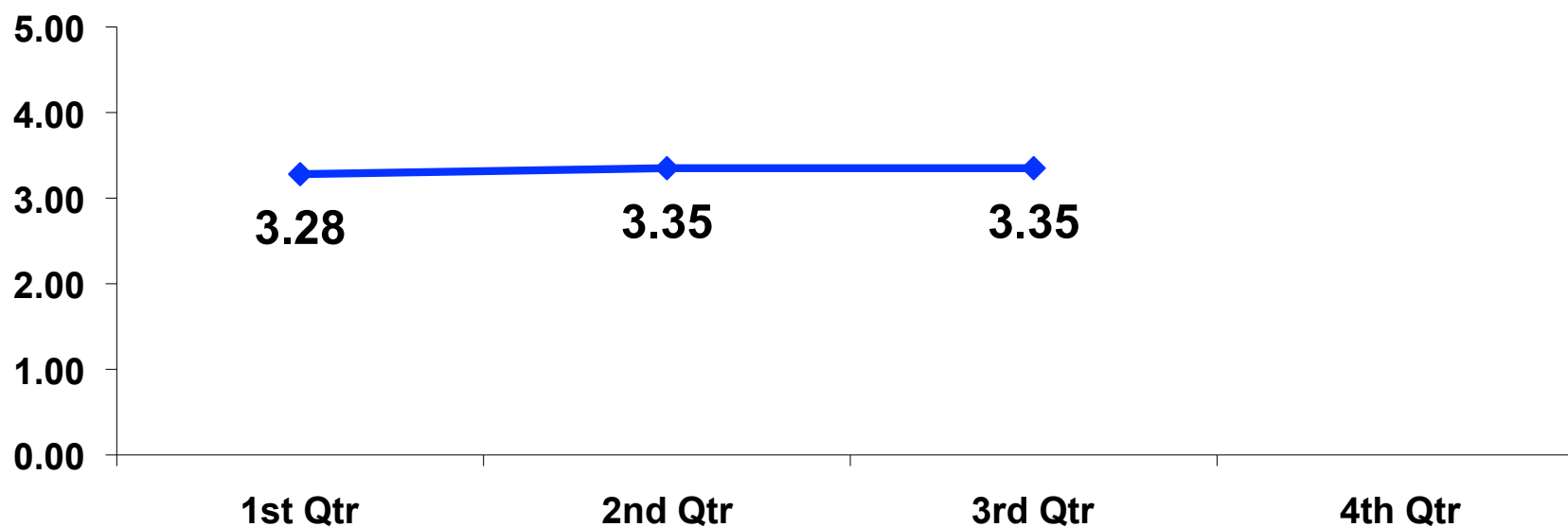
Prior Trips to Guam Tracking



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	132	48	8	3	54	53	73	12	5	57
		Column N %	89%	92%	80%	75%	84%	95%	87%	100%	100%	88%
	No	Count	17	4	2	1	10	3	11	0	0	8
		Column N %	11%	8%	20%	25%	16%	5%	13%	0%	0%	12%
	Total	Count	149	52	10	4	64	56	84	12	5	65

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	3.31	3.60	3.00	3.33	3.39	3.35	3.58	3.40	3.34
	Median	3	3	4	3	3	3	3	4	3	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	23	9	3	0	9	11	13	3	1	11
		Column N %	15%	17%	30%	0%	14%	20%	15%	25%	20%	17%
	Free-time package tour	Count	63	24	5	0	24	27	34	5	2	19
		Column N %	42%	46%	50%	0%	38%	48%	40%	42%	40%	29%
	Individually arranged travel (FIT)	Count	59	19	2	1	30	18	33	4	2	33
		Column N %	40%	37%	20%	25%	48%	32%	39%	33%	40%	51%
	Group tour	Count	1	0	0	0	0	0	1	0	0	0
		Column N %	1%	0%	0%	0%	0%	0%	1%	0%	0%	0%
	Company paid travel	Count	3	0	0	3	0	0	3	0	0	2
		Column N %	2%	0%	0%	75%	0%	0%	4%	0%	0%	3%
	Total	Count	149	52	10	4	63	56	84	12	5	65

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	3%	2%	20%	0%	6%	0%	4%	0%	0%	2%
	Price	6%	10%	30%	0%	6%	4%	4%	0%	20%	0%
	Recomm- friend/family/trvl agnt	12%	12%	20%	0%	10%	13%	13%	17%	0%	12%
	Scuba	15%	13%	30%	0%	16%	20%	17%	8%	20%	20%
	Water sports	9%	6%	20%	0%	10%	13%	10%	8%	20%	11%
	Short travel time	2%	4%	0%	0%	0%	4%	2%	0%	0%	3%
	Golf	10%	12%	0%	0%	8%	7%	7%	0%	0%	12%
	Relax	33%	92%	40%	0%	25%	38%	27%	17%	60%	25%
	Company/ Business Trip	1%	0%	0%	0%	3%	0%	1%	0%	0%	0%
	Company Sponsored	2%	0%	0%	75%	2%	0%	4%	0%	0%	3%
	Convention/ Trade/ Conference	6%	2%	0%	75%	5%	2%	5%	0%	0%	6%
	Safe	20%	13%	30%	0%	19%	25%	19%	17%	20%	18%
	Natural beauty	33%	31%	40%	0%	40%	34%	27%	25%	80%	32%
	Shopping	14%	12%	40%	0%	11%	18%	13%	0%	20%	12%
	Married/ Attn wedding	5%	2%	0%	0%	6%	2%	8%	67%	0%	6%
	Honeymoon	3%	2%	0%	0%	2%	5%	2%	33%	0%	2%
	Pleasure	4%	12%	0%	0%	0%	11%	4%	0%	0%	5%
	Organized sports	1%	0%	0%	0%	0%	2%	1%	8%	0%	0%
	No Visa requirement	13%	13%	30%	0%	13%	14%	14%	8%	20%	11%
	Other	1%	2%	0%	0%	2%	2%	0%	8%	0%	2%
	Total Count	147	52	10	4	63	56	83	12	5	65

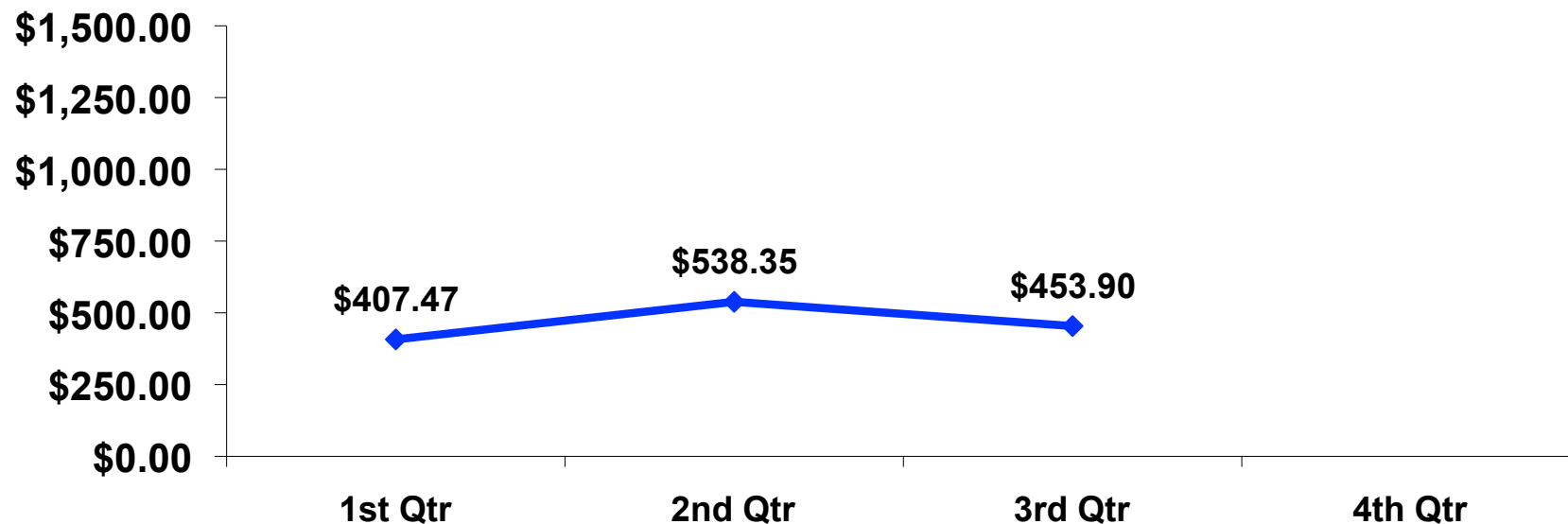
Information Sources

Segmentation

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME	
		-	-	-	-	-	-	-	-	-	-	
Q1	Internet	54%	63%	40%	100%	50%	64%	56%	42%	80%	57%	
	Friend/ Relative	26%	38%	60%	0%	25%	29%	27%	17%	20%	28%	
	TV	26%	35%	50%	0%	22%	32%	30%	25%	40%	34%	
	Co-Worker/ Company Trvl Dept	12%	8%	0%	0%	9%	7%	12%	25%	0%	14%	
	Newspaper	11%	4%	10%	0%	13%	4%	8%	8%	0%	8%	
	Prior Trip	10%	6%	10%	25%	13%	5%	11%	0%	0%	11%	
	Travel Agent Brochure	8%	13%	10%	0%	6%	13%	6%	17%	0%	6%	
	Travel Guidebook- Bookstore	7%	12%	0%	0%	6%	9%	5%	8%	0%	5%	
	Consumer Trvl Show	3%	4%	10%	0%	2%	7%	2%	0%	0%	3%	
	Travel Trade Show	3%	2%	0%	0%	3%	4%	6%	8%	0%	5%	
	Magazine (Consumer)	3%	4%	20%	0%	2%	2%	2%	8%	0%	2%	
	Radio	3%	4%	10%	0%	5%	2%	4%	0%	0%	3%	
	GVB Promo	1%	2%	0%	0%	0%	2%	0%	0%	0%	2%	
	Total	Count	149	52	10	4	64	56	84	12	5	65

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

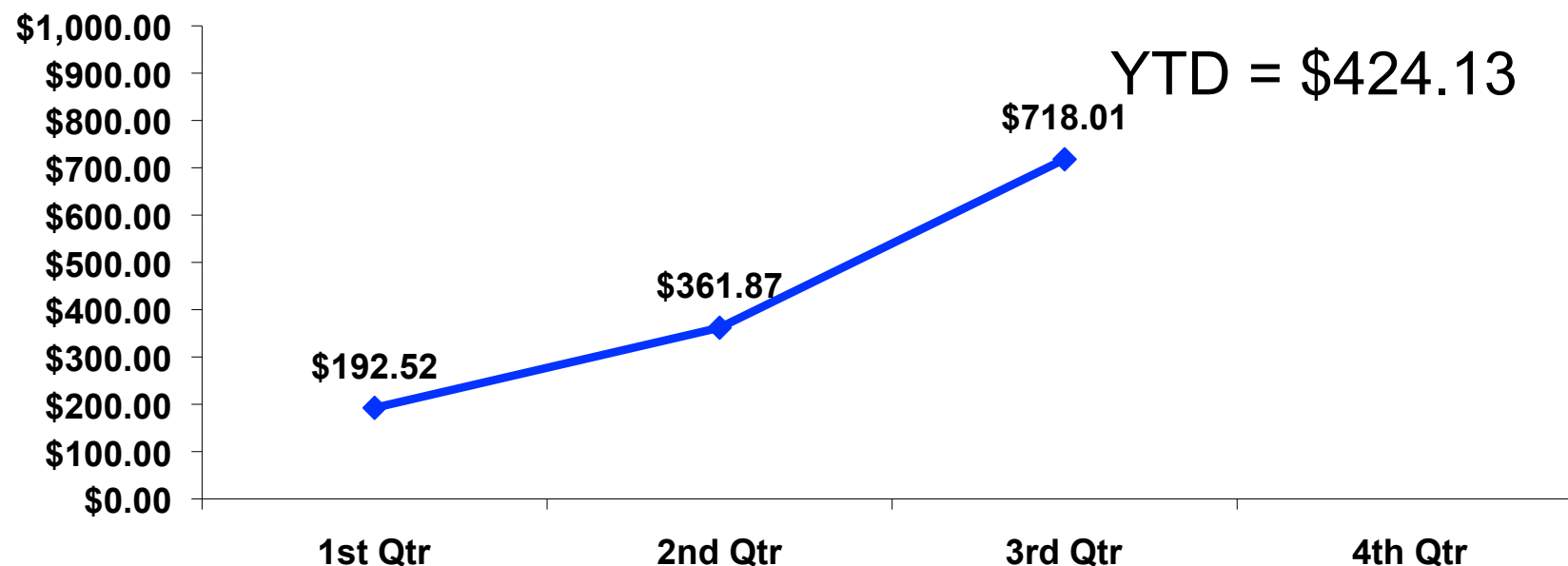


YTD=\$466.57

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	\$453.90	\$470.70	\$606.12	\$167.17	\$467.43	\$524.75	\$441.31	\$416.04	\$548.18	\$401.40
	Median	\$544	\$568	\$736	\$0	\$543	\$705	\$519	\$247	\$799	\$331
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$1,401	\$1,337	\$1,170	\$669	\$1,401	\$1,345	\$1,401	\$1,170	\$1,137	\$1,345

On-Island Expenditures Tracking



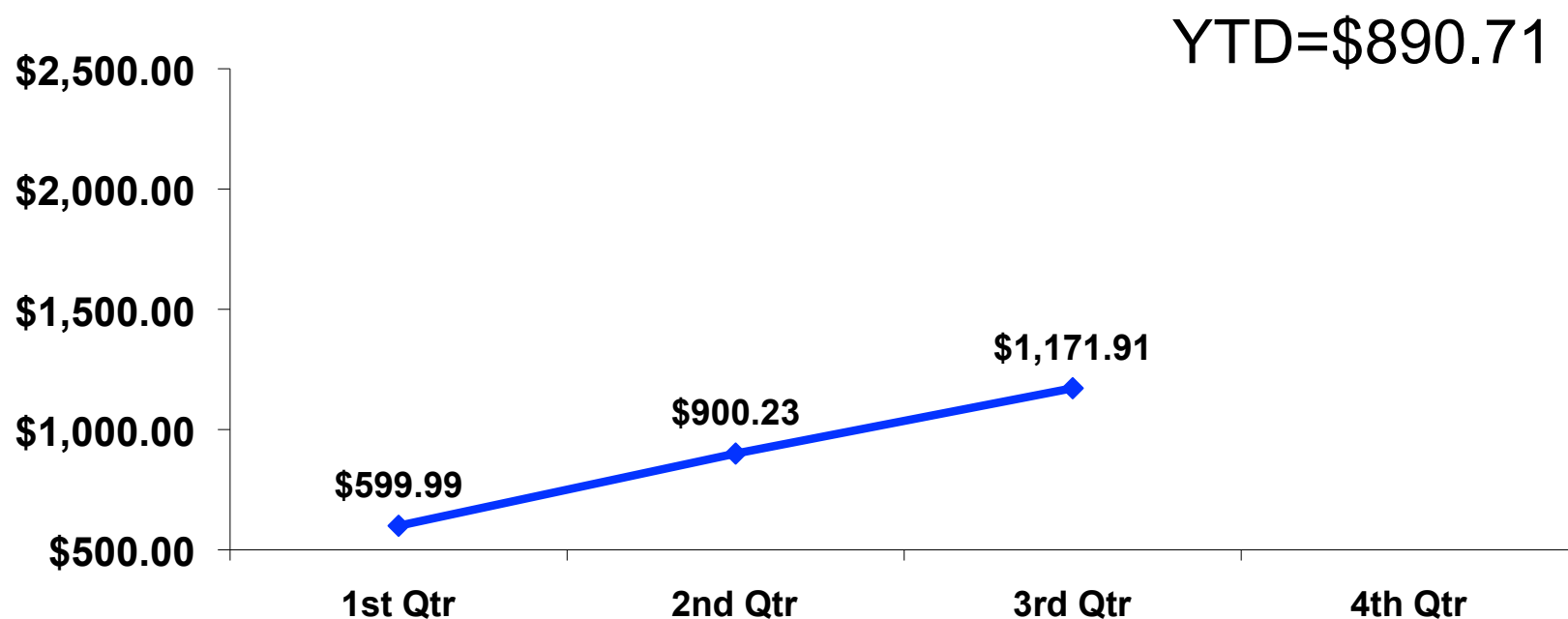
On-Island Expenditures Per Person Segmentation

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$718.01	\$487.16	\$265.83	\$94.50	\$385.79	\$522.51	\$1,047.28	\$212.04	\$342.00	\$618.79
	Median	\$186	\$182	\$111	\$89	\$183	\$252	\$200	\$194	\$340	\$188
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$30,000	\$11,250	\$1,000	\$200	\$6,667	\$11,250	\$30,000	\$942	\$1,000	\$11,250

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	\$868.65	\$800.71	.	\$668.67	\$860.73	\$805.92	\$757.02	\$877.63	\$725.51	\$807.53
	Median	\$801	\$839	.	\$669	\$710	\$802	\$669	\$878	\$726	\$839
	Minimum	\$451	\$451	.	\$669	\$502	\$451	\$451	\$585	\$652	\$451
	Maximum	\$2,508	\$1,080	.	\$669	\$2,508	\$1,170	\$1,170	\$1,170	\$799	\$1,070
AIR/ HOTEL/ MEAL	Mean	\$1,435.47	\$1,528.75	\$1,564.69	.	\$1,479.41	\$1,430.72	\$1,449.24	\$1,433.47	.	\$1,464.87
	Median	\$1,463	\$1,483	\$1,565	.	\$1,585	\$1,413	\$1,421	\$1,538	.	\$1,463
	Minimum	\$652	\$769	\$1,565	.	\$786	\$652	\$652	\$652	.	\$652
	Maximum	\$2,675	\$2,675	\$1,565	.	\$1,906	\$2,675	\$2,675	\$2,006	.	\$1,906
AIR ONLY	Mean	\$2,344.53	\$2,256.77	\$2,181.54	.	\$2,465.73	\$2,223.34	\$2,373.79	.	.	\$2,344.53
	Median	\$2,299	\$2,257	\$2,182	.	\$2,466	\$2,223	\$2,340	.	.	\$2,299
	Minimum	\$2,106	\$2,257	\$2,106	.	\$2,257	\$2,106	\$2,106	.	.	\$2,106
	Maximum	\$2,675	\$2,257	\$2,257	.	\$2,675	\$2,340	\$2,675	.	.	\$2,675
HOTEL ONLY	Mean	\$2,634.57	\$2,540.96	\$2,540.96	.	.	\$2,728.18	\$2,540.96	.	.	.
	Median	\$2,635	\$2,541	\$2,541	.	.	\$2,728	\$2,541	.	.	.
	Minimum	\$2,541	\$2,541	\$2,541	.	.	\$2,728	\$2,541	.	.	.
	Maximum	\$2,728	\$2,541	\$2,541	.	.	\$2,728	\$2,541	.	.	.
HOTEL & MEAL	Mean	\$4,156.92	\$5,850.89	\$4,597.12	.	.	\$3,343.36	\$3,309.93	.	.	\$3,309.93
	Median	\$3,343	\$5,851	\$4,597	.	.	\$3,343	\$3,310	.	.	\$3,310
	Minimum	\$3,276	\$5,851	\$3,343	.	.	\$3,343	\$3,276	.	.	\$3,276
	Maximum	\$5,851	\$5,851	\$5,851	.	.	\$3,343	\$3,343	.	.	\$3,343
F&B HOTEL	Mean	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.
	Minimum	.	.	.	.	.	.	.	.	.	.
	Maximum	.	.	.	.	.	.	.	.	.	.
TRANS- TAIWAN	Mean	\$47.57	\$33.43	\$92.95	.	\$53.97	\$36.36	\$51.15	\$61.85	\$60.18	\$38.45
	Median	\$42	\$33	\$93	.	\$60	\$35	\$41	\$62	\$60	\$38
	Minimum	\$17	\$33	\$93	.	\$17	\$33	\$33	\$62	\$60	\$17
	Maximum	\$93	\$33	\$93	.	\$93	\$42	\$93	\$62	\$60	\$62
TRANS- GUAM	Mean	\$18.36	\$6.02	.	.	\$13.71	\$21.86	\$11.16	\$10.03	.	\$8.94
	Median	\$13	\$6	.	.	\$13	\$11	\$12	\$10	.	\$9
	Minimum	\$6	\$6	.	.	\$10	\$6	\$8	\$10	.	\$8
	Maximum	\$60	\$6	.	.	\$18	\$60	\$13	\$10	.	\$10
OPT TOURS	Mean	\$297.56	\$302.57	\$359.41	.	.	\$240.72	\$297.56	\$334.34	.	\$292.54
	Median	\$293	\$303	\$359	.	.	\$251	\$293	\$334	.	\$293
	Minimum	\$137	\$137	\$251	.	.	\$137	\$137	\$334	.	\$251
	Maximum	\$468	\$468	\$468	.	.	\$334	\$468	\$334	.	\$334
OTHER	Mean	\$549.82	\$457.60	\$1,136.74	.	\$595.98	\$485.19	\$399.10	\$334.34	\$614.84	\$267.97
	Median	\$552	\$184	\$1,137	.	\$502	\$619	\$502	\$334	\$615	\$176
	Minimum	\$52	\$52	\$1,137	.	\$93	\$52	\$52	\$334	\$93	\$52
	Maximum	\$1,337	\$1,137	\$1,137	.	\$1,337	\$903	\$669	\$334	\$1,137	\$669
TOTAL	Mean	\$782.48	\$812.59	\$1,961.15	\$167.17	\$714.49	\$864.93	\$762.51	\$685.81	\$548.18	\$751.27
	Median	\$659	\$762	\$1,882	\$0	\$590	\$802	\$590	\$293	\$799	\$537
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,851	\$5,851	\$5,851	\$669	\$2,675	\$3,594	\$3,594	\$2,006	\$1,137	\$3,594

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	\$1,171.91	\$957.86	\$871.95	\$261.67	\$853.22	\$1,047.26	\$1,488.59	\$628.08	\$890.18	\$1,020.20
	Median	\$801	\$802	\$864	\$100	\$814	\$936	\$773	\$584	\$1,145	\$708
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$30,752	\$11,250	\$2,137	\$847	\$7,558	\$11,250	\$30,752	\$1,503	\$2,137	\$11,250

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 and 3rd Qtr 2013 and Overall 1st Qtr 2012 to 3rd Qtr 2013				
Drivers:	1st Qtr 2012	2nd Qtr 2013	3rd Qtr 2013	Combined 1st Qtr 2012 to 3rd Qtr 2013
Quality & Cleanliness of beaches & parks	2			2
Ease of getting around				
Safety walking around at night		3		5
Quality of daytime tours		1		
Variety of daytime tours				
Quality of nighttime tours		4	2	4
Variety of nighttime tours				
Quality of shopping				
Variety of shopping				
Price of things on Guam	1		1	3
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%	16.7%	24.9%
NOTE: Only significant drivers are included.				

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by two significant factors in the Third Quarter 2013 Period. By rank order they are:
 - **Price of things on Guam, and**
 - **Quality of night time tours.**
- With these two factors the overall r^2 is .167 meaning that **16.7% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, 1st Qtr 2012, 2nd and 3rd Qtr 2013 and Overall 1st Qtr 2012 to 3rd Qtr 2013				
	1st Qtr 2012	2nd Qtr 2013	3rd Qtr 2013	Combined 1st Qtr 2012 to 3rd Qtr 2013
Drivers:				
Quality & Cleanliness of beaches & parks				1
Ease of getting around		1		
Safety walking around at night				
Quality of daytime tours				
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours		5		
Quality of shopping	1	3		
Variety of shopping				
Price of things on Guam	2			
Quality of hotel accommodations		2		
Quality/cleanliness of air, sky				
Quality/cleanliness of parks				
Quality of landscape in Tumon		4		
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%	0.0%	1.4%
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 no significant factors in the Third Quarter 2013 Period.