



GUAM VISITORS BUREAU

Taiwan Visitor Tracker Exit Profile

FY2013

3RD Qtr. (APR~JUN 2013)



Prepared by: QMark Research

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Background & Methodology

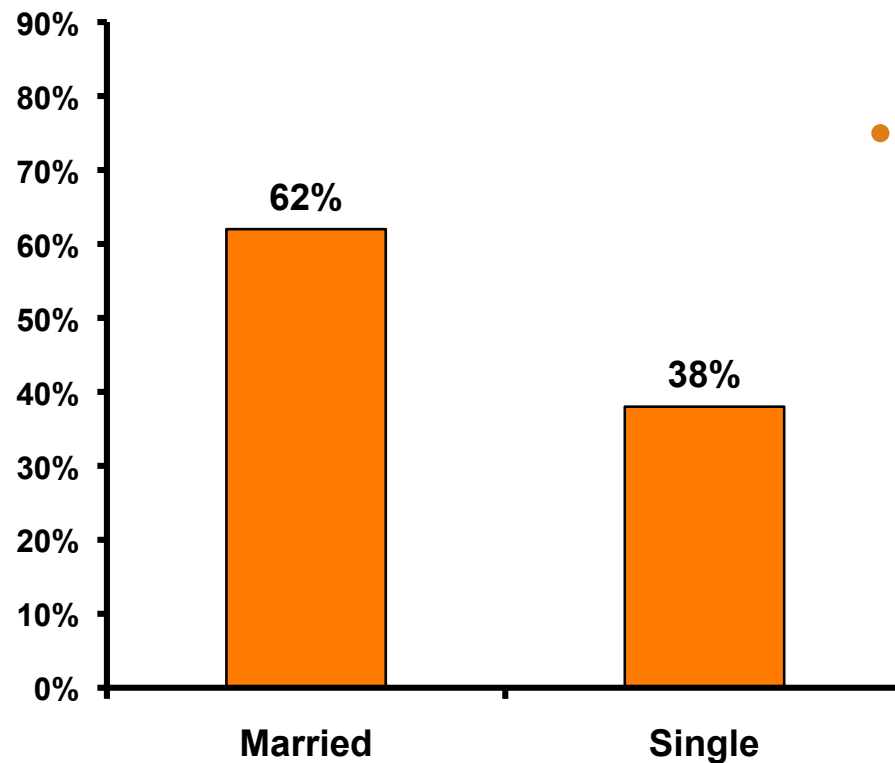
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **150** departing 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.

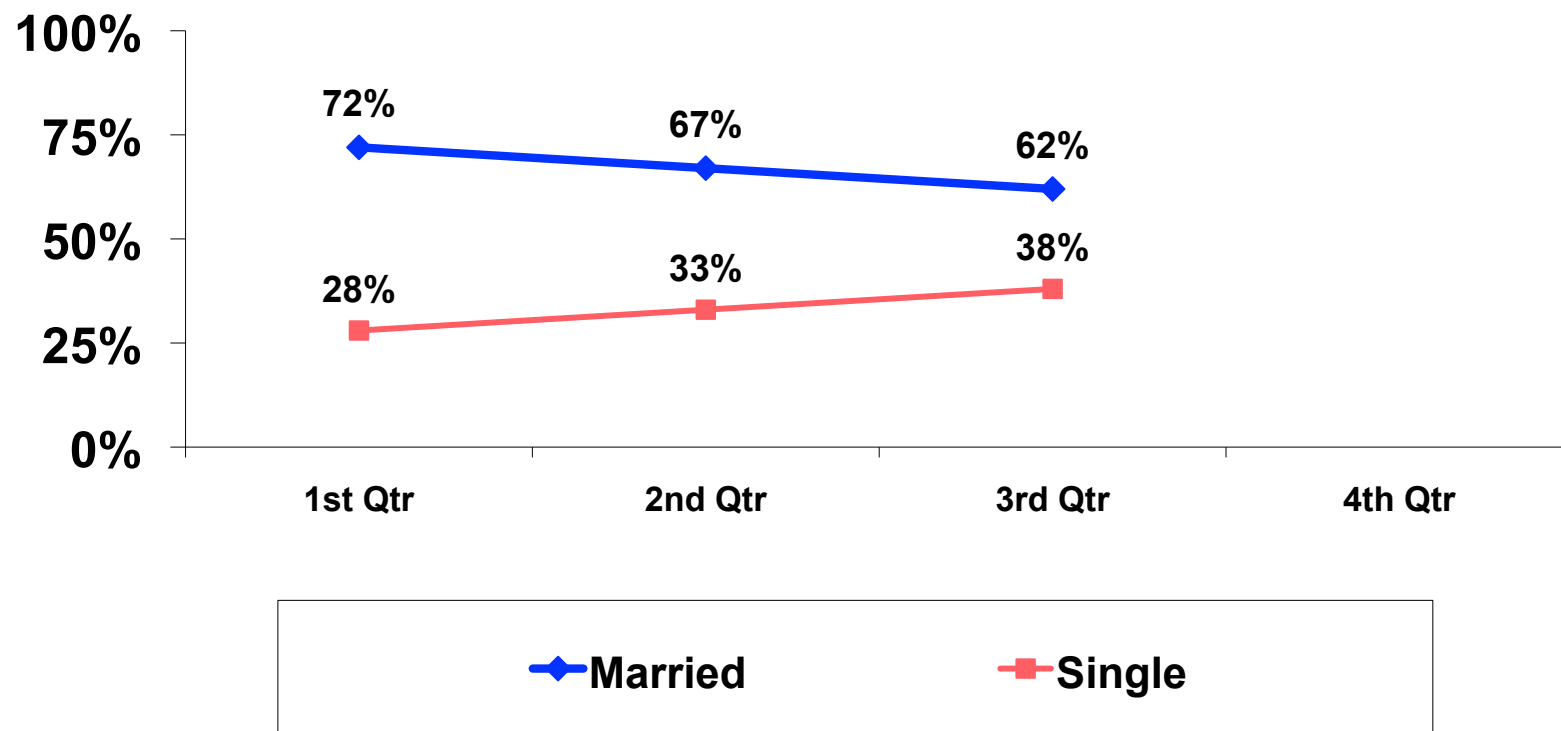
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

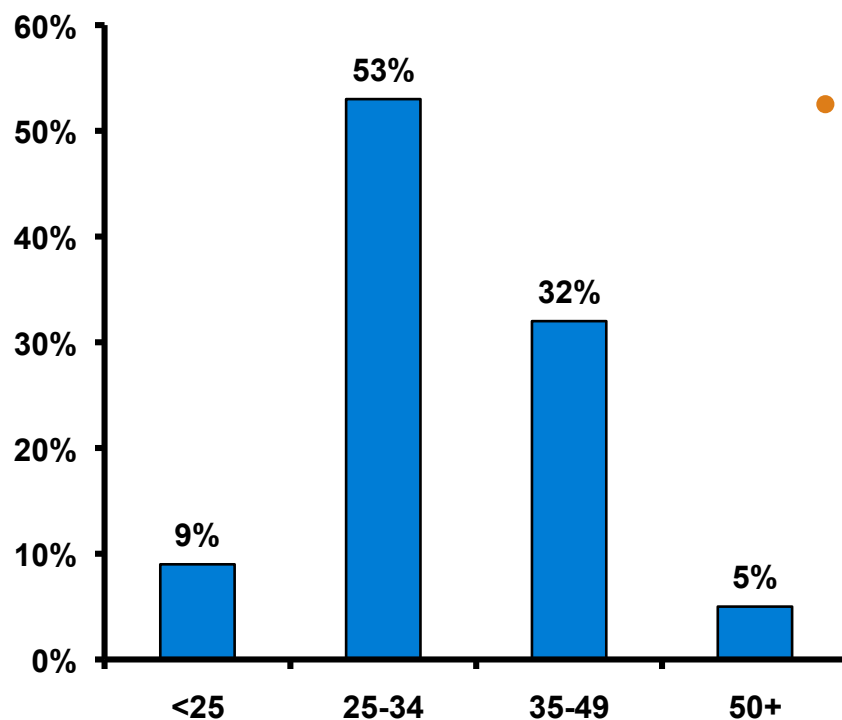


- Majority of Taiwanese visitors are married.

Marital Status

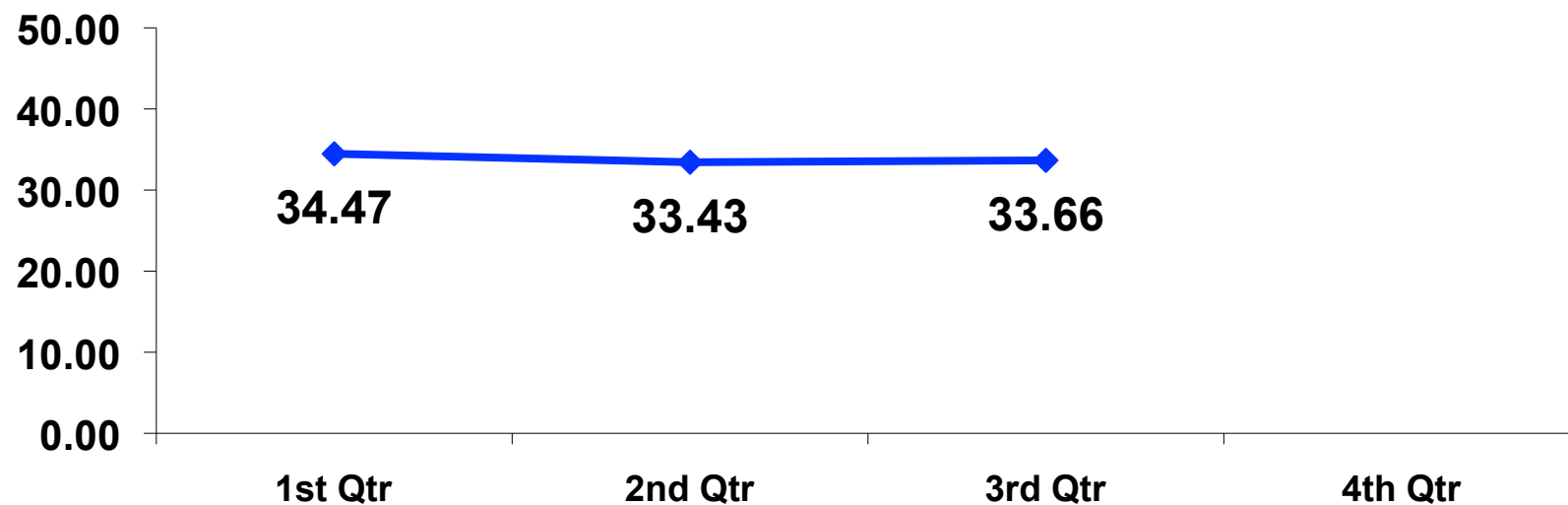


Age - Overall

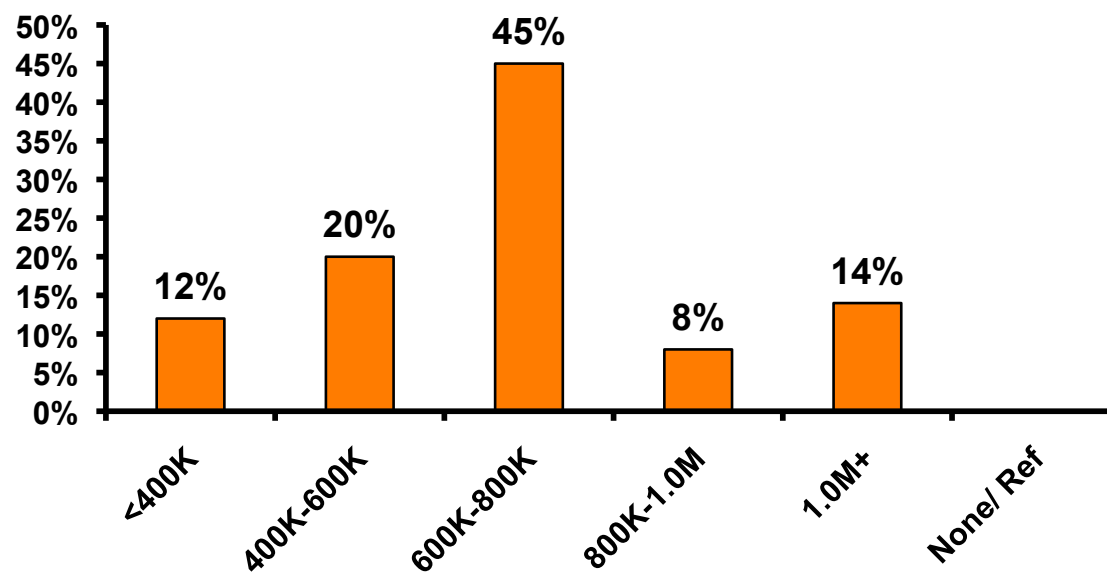


- The average age of the respondents is 33.66 years of age.

Average Age

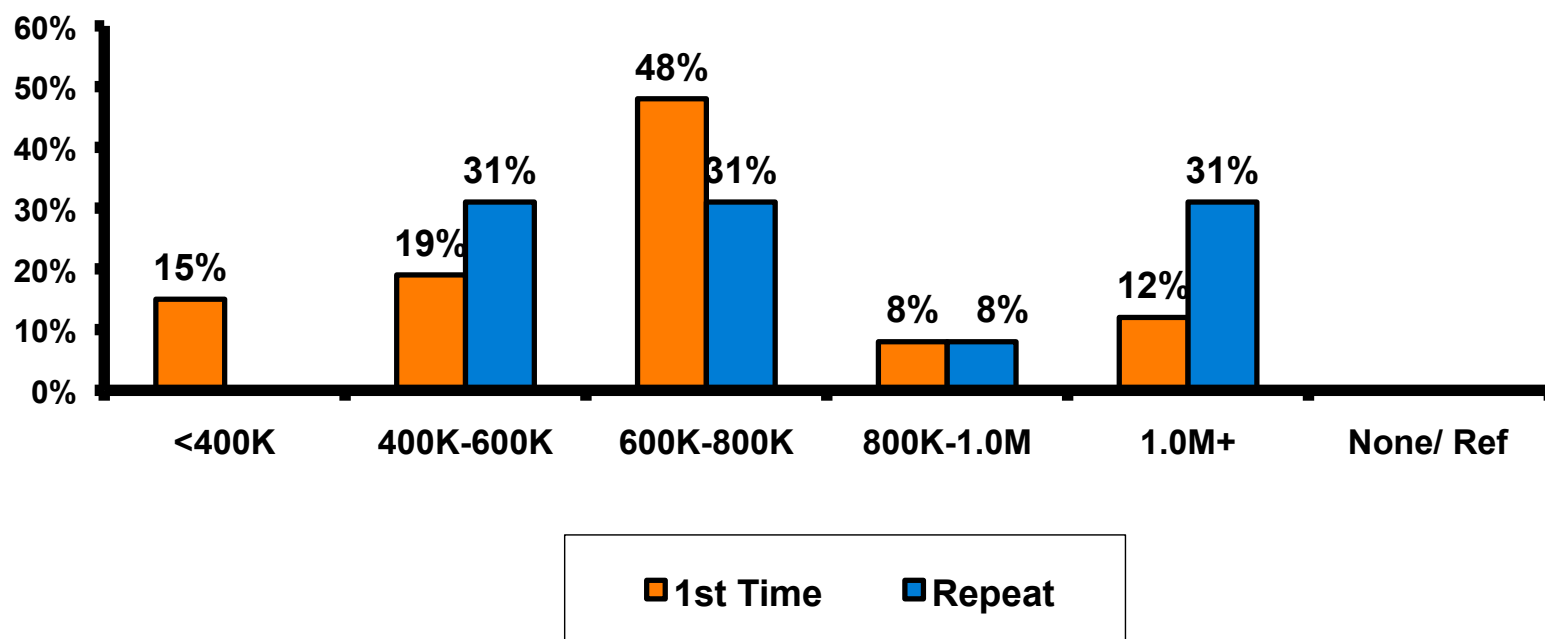


Personal Income



- TWD29.91=\$1

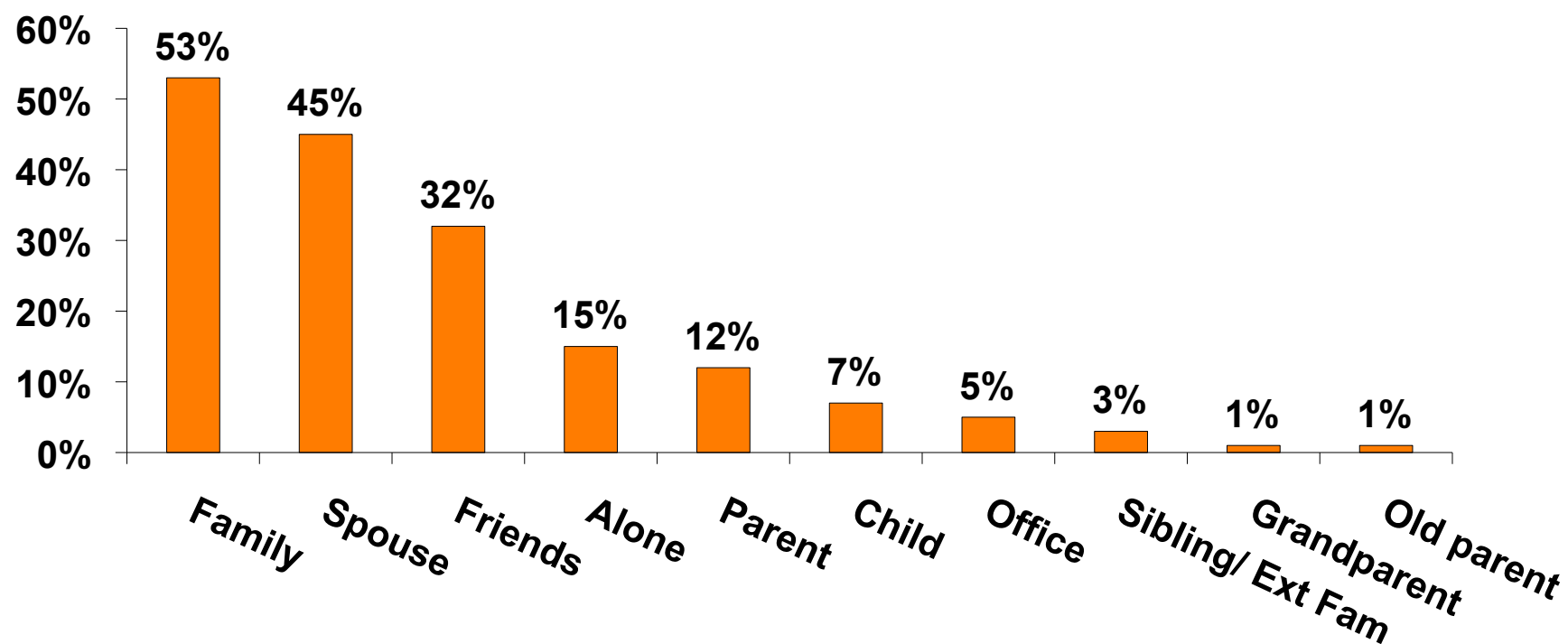
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<=NT160K	Count	4	1	3	1	2	1	
		Column N %	4%	2%	6%	14%	3%	3%	
	NT160K-NT200K	Count	4		4	1	3		
		Column N %	4%		8%	14%	5%		
	NT200K-NT400K	Count	4	1	3	1	2	1	
		Column N %	4%	2%	6%	14%	3%	3%	
	NT400K-NT600K	Count	20	12	8	1	14	5	
		Column N %	20%	24%	17%	14%	24%	15%	
	NT600K-NT800K	Count	45	23	22	1	24	20	
		Column N %	45%	45%	46%	14%	41%	61%	
	NT800K-NT1.0M	Count	8	6	2	1	4	2	1
		Column N %	8%	12%	4%	14%	7%	6%	100%
	NT1.0M+	Count	14	8	6	1	9	4	
		Column N %	14%	16%	13%	14%	16%	12%	
	Total	Count	99	51	48	7	58	33	1

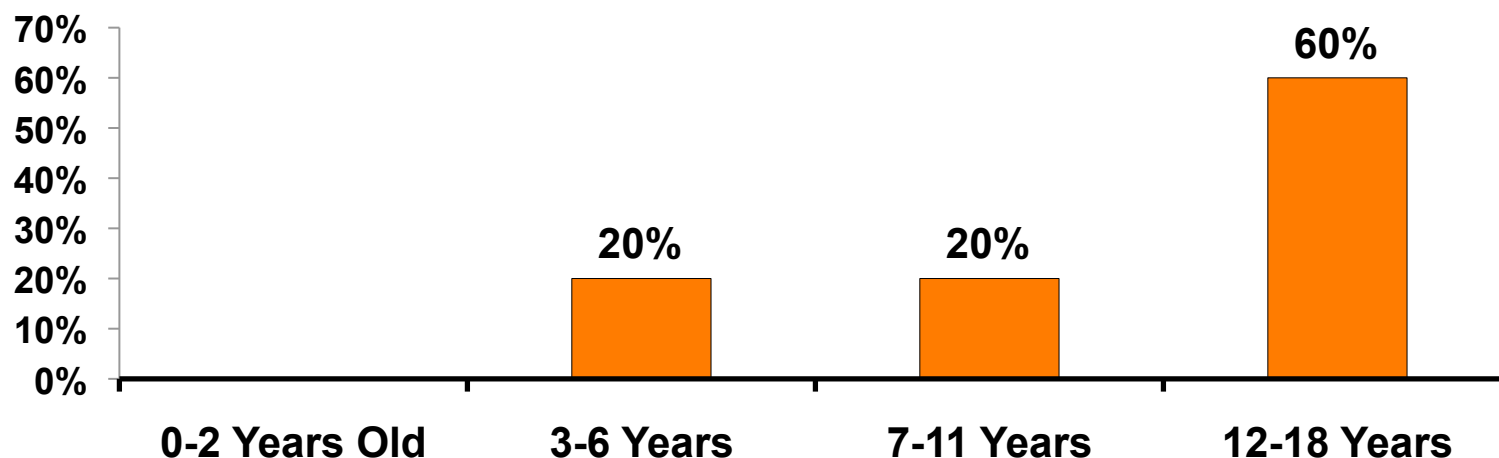
Travel Companions



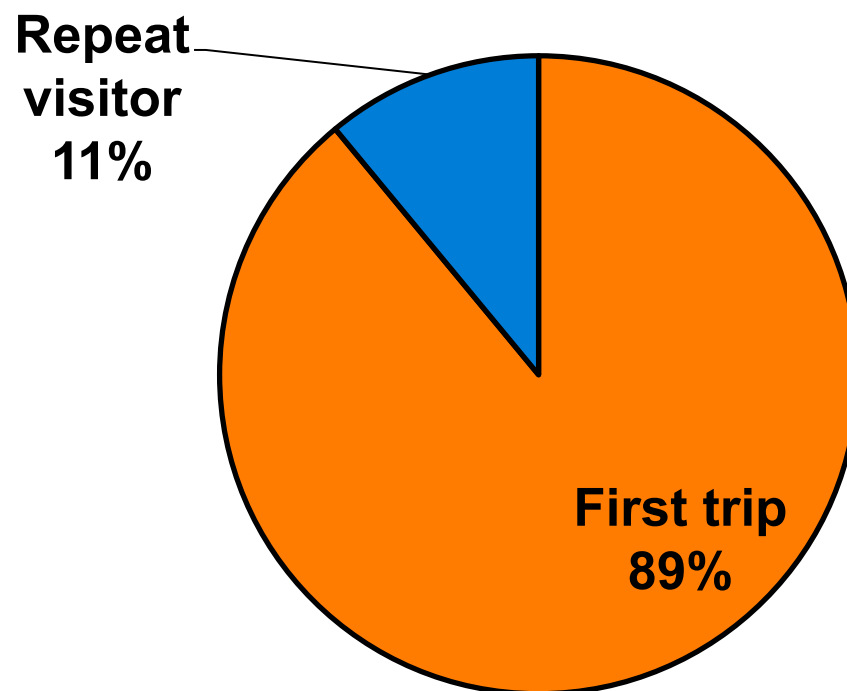
Number of Children Travel Party

N=10 total respondents traveling with children.

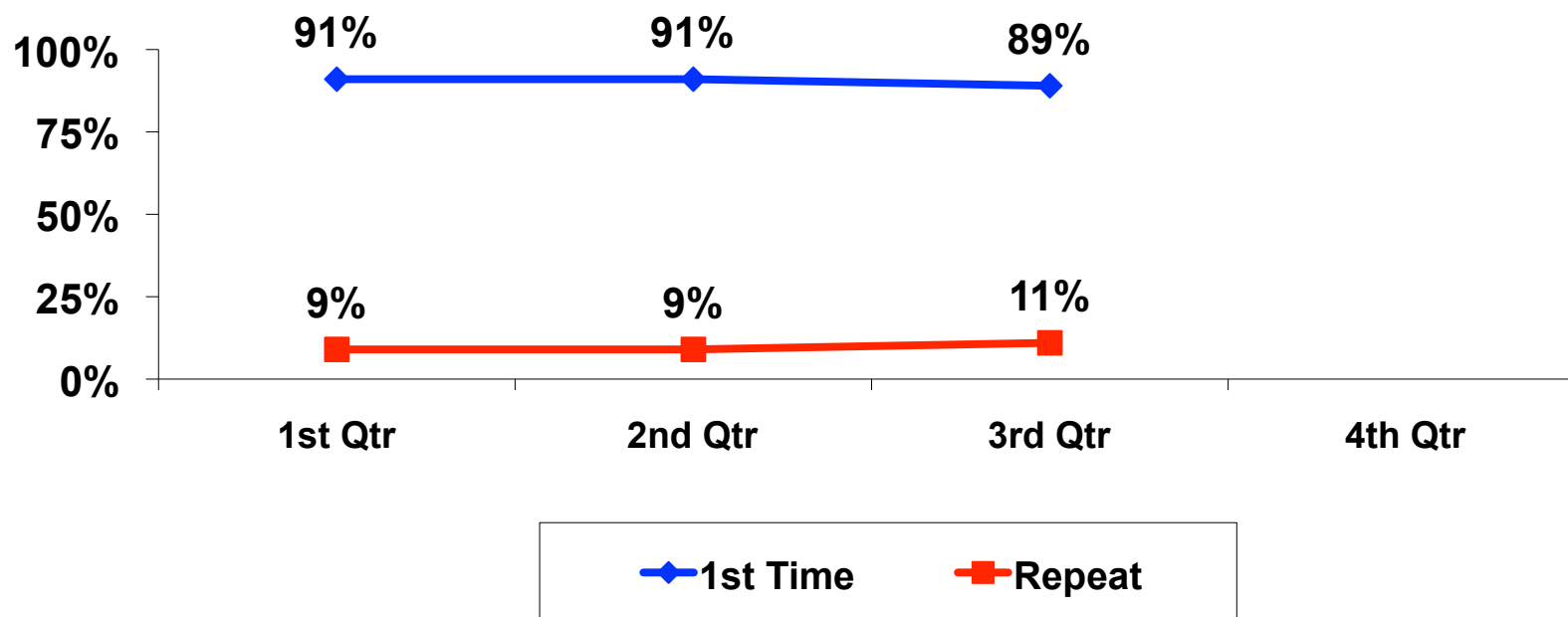
(Of those N=10 respondents, there is a total of 13 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



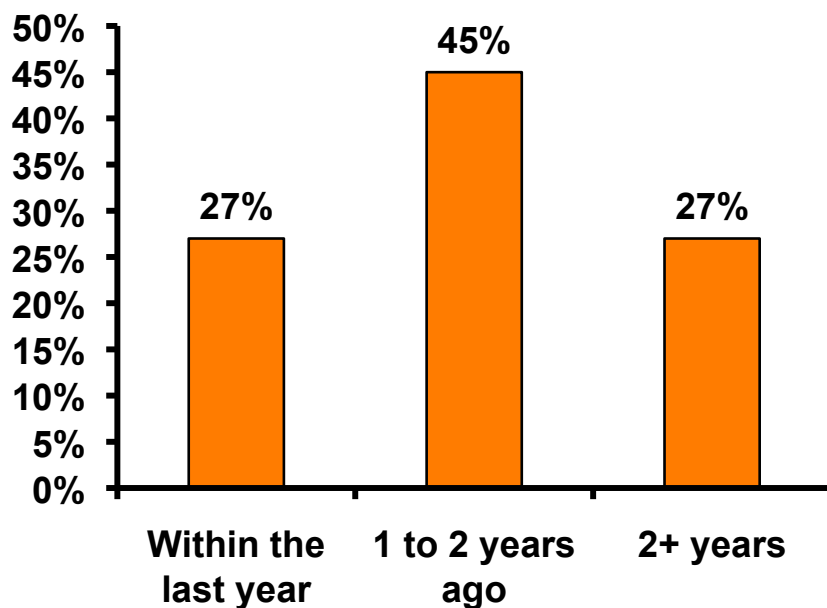
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	79	67	11
		Column N %	53%	51%	65%
	Female	Count	71	65	6
		Column N %	47%	49%	35%
AGE	Total	Count	150	132	17
	18-24	Count	14	13	1
		Column N %	9%	10%	6%
	25-34	Count	79	68	11
		Column N %	53%	52%	65%
	35-49	Count	47	42	5
		Column N %	32%	32%	29%
	50+	Count	8	8	
		Column N %	5%	6%	
	Total	Count	148	131	17

- Majority are first-time visitors to Guam.

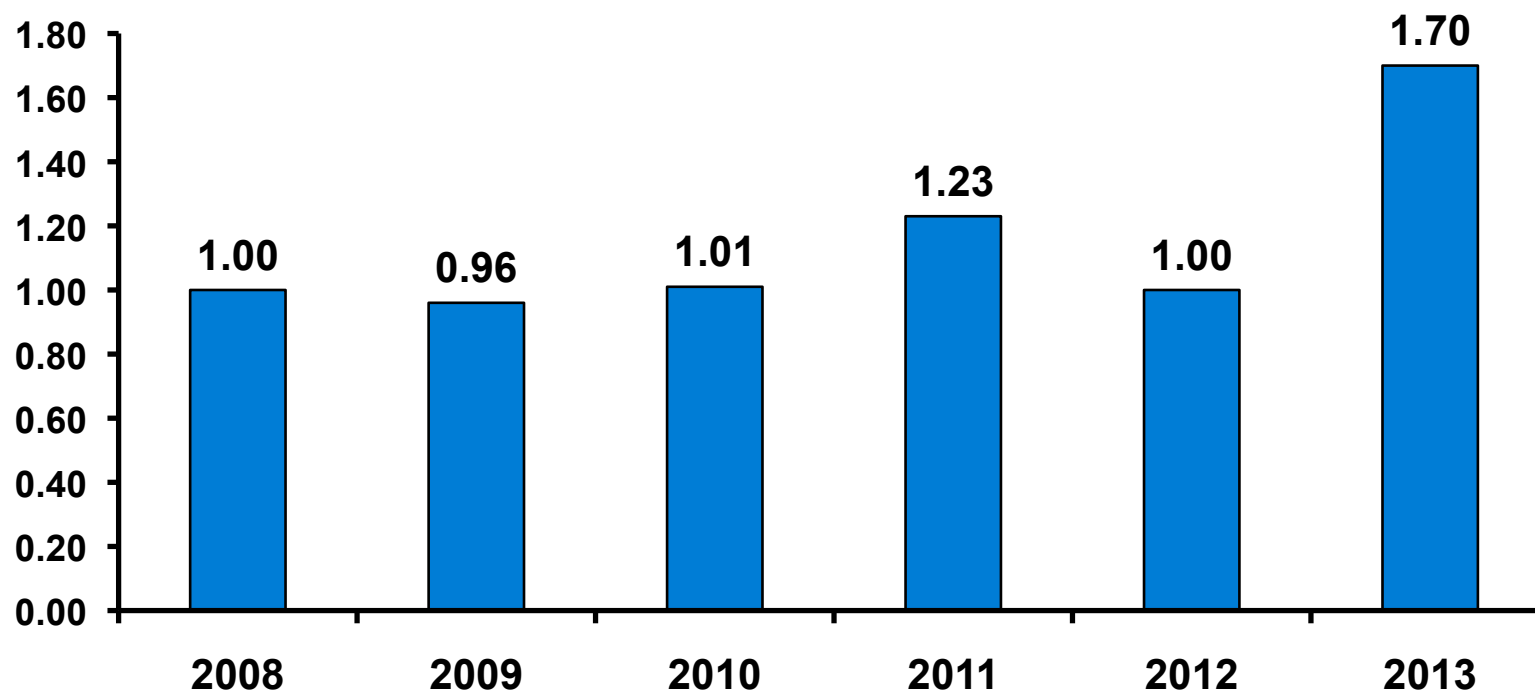
Repeat Visitors Last Trip

n = 11



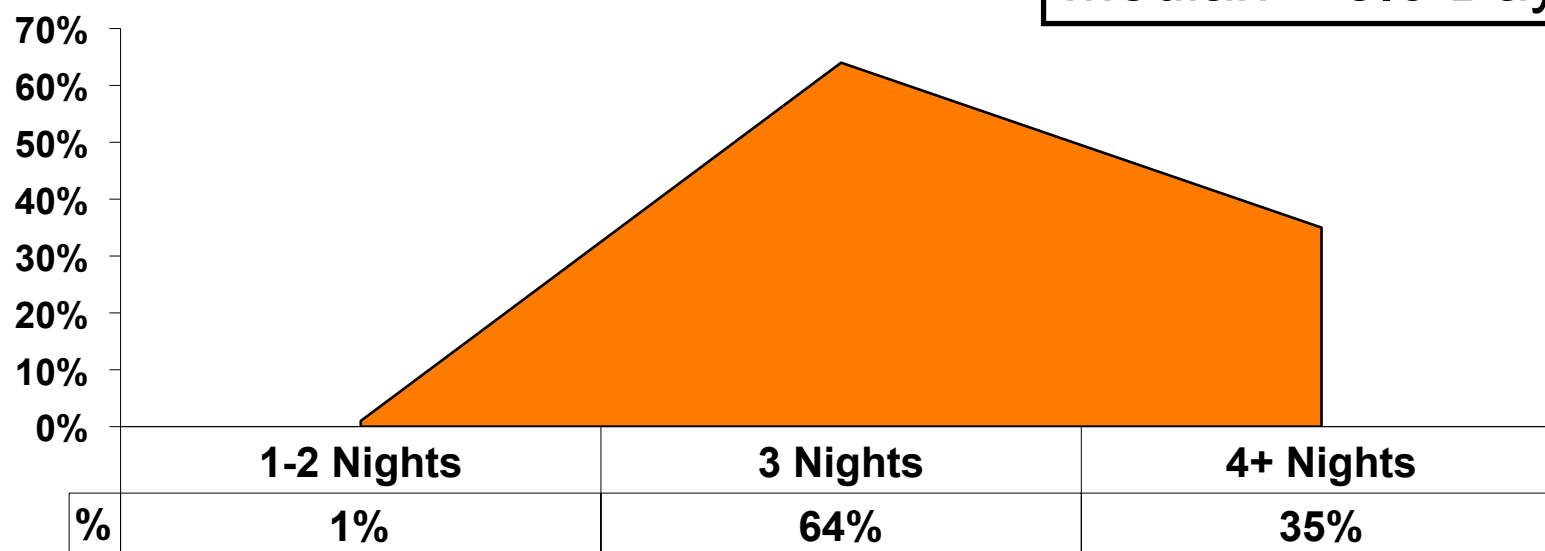
- The average repeat visitor has been to Guam 1.82 times.

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

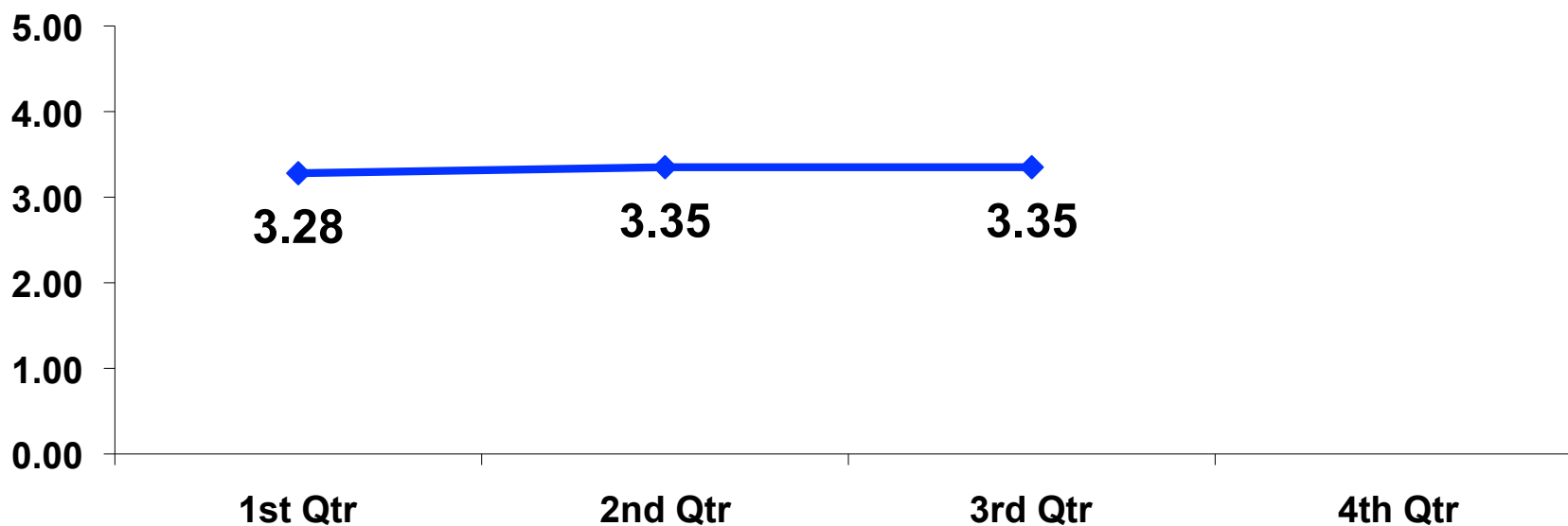


Length of Stay

Mean = 3.35 Days
Median = 3.0 Days



Average Length of Stay

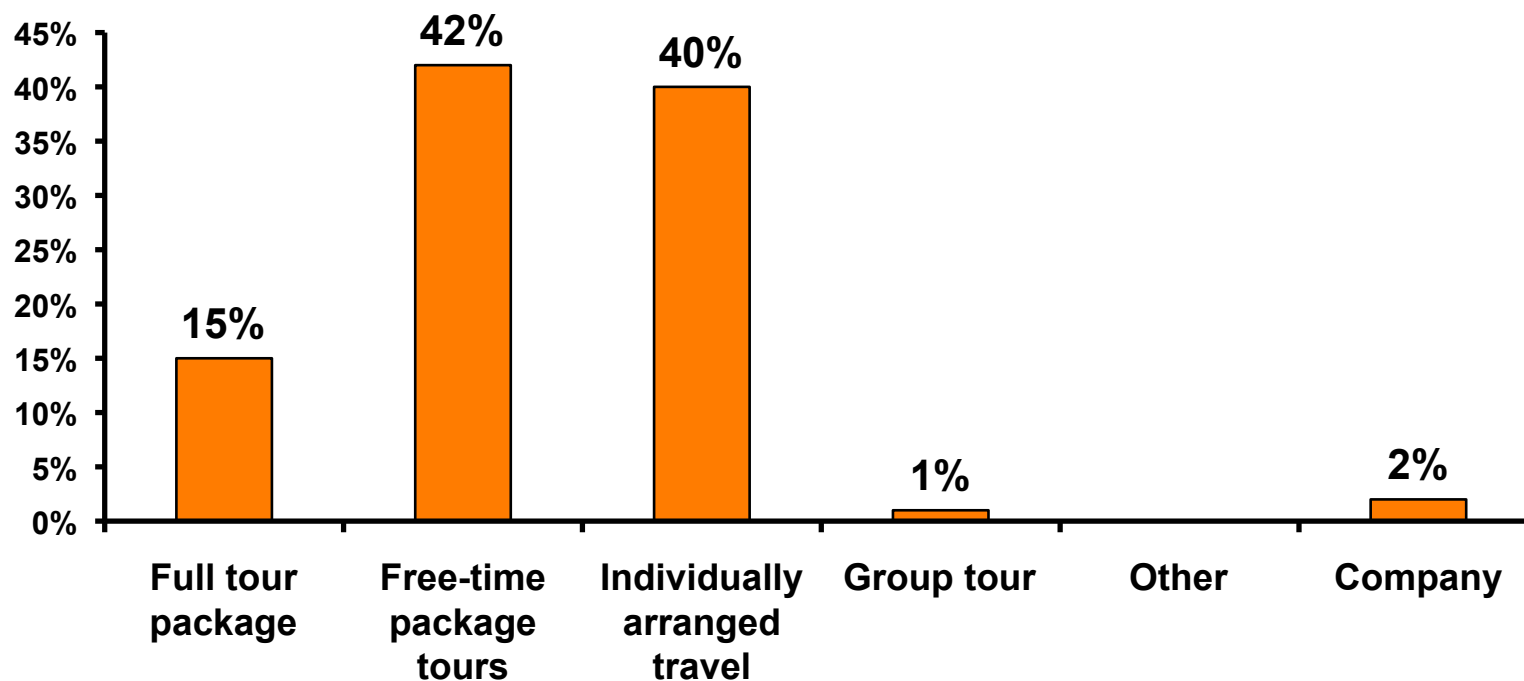


Occupation by Income

		TOTAL	Q26						
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+
Q25	Company: Office non-mgr	60%	25%	75%	100%	80%	64%	50%	14%
	Skilled worker	9%	25%				14%	13%	21%
	Company: Salesperson	8%		25%		5%	16%		
	Prof-specialist	5%				5%	2%		21%
	Student	4%					2%	13%	7%
	Freelancer	3%	25%				2%	13%	7%
	Govt- Office non-mgr	3%				5%		13%	
	Govt- Mgr/ Exec	3%	25%			5%			7%
	Other	2%							14%
	Retired	1%							
	Govt- Executive	1%							7%
	Total Count	116	4	4	4	20	44	8	14

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

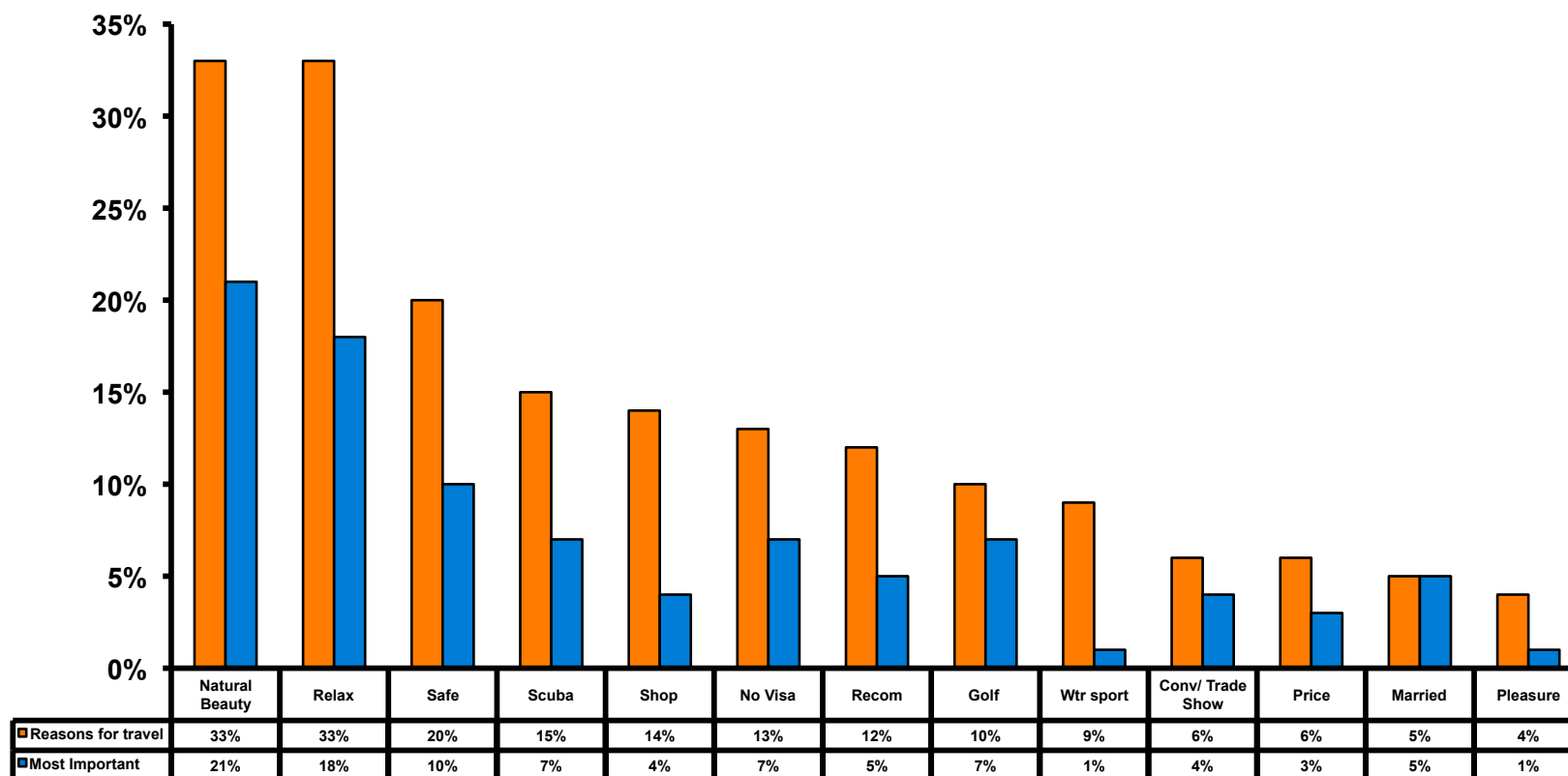


Accommodation by Income

Average length of stay: 3.35 days

		TOTAL	Q26							
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income
Q9	Royal Orchid Guam	16%	25%	50%	25%	15%	18%			
	Hilton Guam Resort	15%		25%		5%	20%	13%		
	Fiesta Resort Guam	10%	25%	25%	50%	15%	9%	13%	8%	
	Sheraton Laguna Guam	9%				10%	11%		8%	
	PIC Club	9%				25%	4%	13%	8%	
	Hotel Nikko Guam	8%					4%	13%	8%	
	Outrigger Guam Resort	7%					9%	13%	15%	
	Westin Resort Guam	7%				5%	9%		8%	
	Hyatt Regency Guam	5%					7%		15%	
	Hotel Santa Fe	3%	50%						15%	
	Holiday Resort Guam	3%			25%	10%	2%			
	Onward Beach Resort	2%				5%	4%			
	Guam Marriott Resort	2%				5%	2%		8%	
	Bayview Hotel	1%						13%		
	Guam Reef & Olive Spa	1%						13%		
	Pacific Bay Hotel	1%							8%	
	Guam Plaza Hotel	1%				5%				
	Oceanview Hotel	1%						13%		
	Total	Count	149	4	4	4	20	45	8	13

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Relaxation and
- 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	33%	57%	36%	21%	29%	36%	30%
	Relax	33%	57%	29%	32%	29%	26%	41%
	Safe	20%	29%	18%	19%	29%	18%	22%
	Scuba	15%	29%	15%	13%		13%	17%
	Shopping	14%	14%	14%	13%	14%	10%	17%
	No Visa requirement	13%	14%	14%	11%	14%	12%	14%
	Recomm- friend/family/trvl agnt	12%	14%	13%	6%	29%	10%	13%
	Golf	10%	7%	8%	11%	29%	9%	10%
	Water sports	9%	14%	13%	2%		8%	10%
	Convention/ Trade/ Conference	6%		3%	15%		9%	3%
	Price	6%	7%	5%	4%	29%	8%	4%
	Married/ Attn wedding	5%	7%	4%	6%	14%	8%	3%
	Pleasure	4%		5%	4%			9%
	Previous trip	3%		5%	2%		5%	1%
	Honeymoon	3%		5%			1%	4%
	Company Sponsored	2%			6%		3%	1%
	Short travel time	2%		1%	4%			4%
	Other	1%		3%			1%	1%
	Company/ Business Trip	1%		3%			3%	
	Organized sports	1%	7%					1%
Total	Count	147	14	78	47	7	78	69

Motivation by Income

		TOTAL	Q26						
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+ No Income
Q5A	Natural beauty	33%	75%	100%	50%	35%	31%		50%
	Relax	33%		50%	50%	20%	27%	14%	36%
	Safe	20%	25%	75%		10%	22%		36%
	Scuba	15%	25%	25%	50%	10%	24%	14%	14%
	Shopping	14%		50%		25%	7%	14%	36%
	No Visa requirement	13%	25%	50%	25%	15%	9%	14%	21%
	Recomm- friend/family/trvl agnt	12%	75%		25%	25%	7%		21%
	Golf	10%				10%	13%		
	Water sports	9%	50%	50%		15%	9%		14%
	Convention/ Trade/ Conference	6%					9%	29%	
	Price	6%							21%
	Married/ Attn wedding	5%	25%			15%	2%	14%	
	Pleasure	4%		25%			7%		
	Previous trip	3%					2%	14%	21%
	Honeymoon	3%		25%		5%			7%
	Company Sponsored	2%					4%		
	Short travel time	2%			25%		4%		
	Other	1%					2%		7%
	Company/ Business Trip	1%							7%
	Organized sports	1%	25%						
	Total Count	147	4	4	4	20	45	7	14

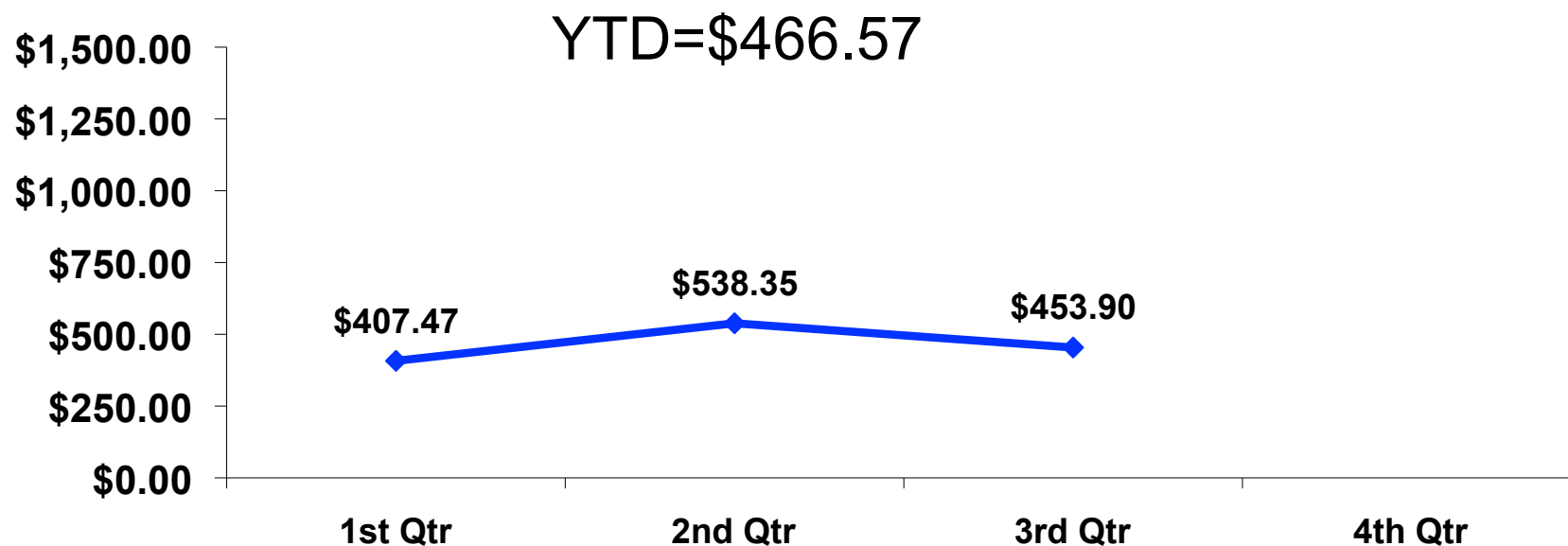
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

TWD 29.91/US\$1

- \$782.48 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$5,851 = maximum (highest amount recorded for the entire sample)
- \$453.90 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

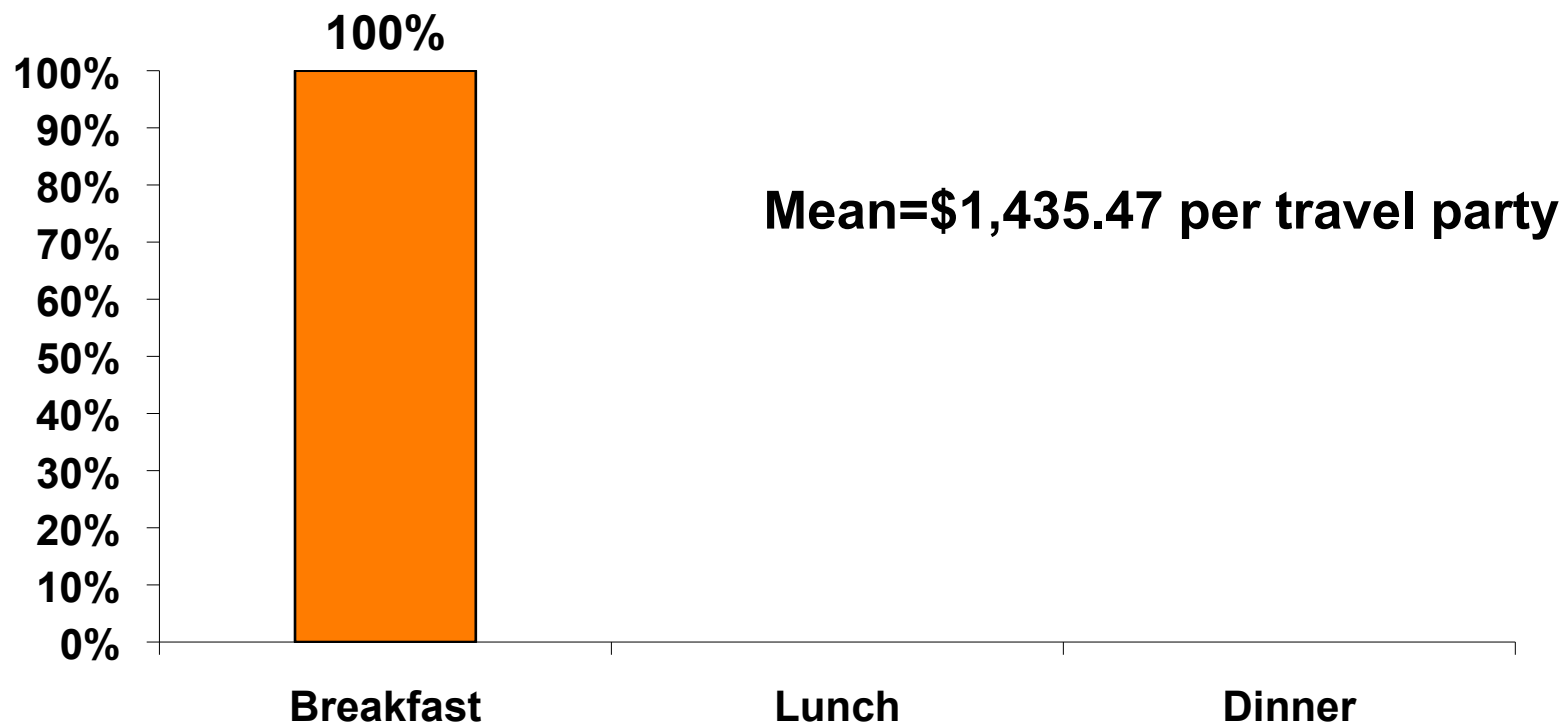
TWD29.91=\$1

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

	MEAN \$
Air & Accommodation package only	\$868.65
Air & Accommodation w/ daily meal package	\$1,435.47
Air only	\$2,344.53
Accommodation only	\$2,634.57
Accommodation w/ daily meal only	\$4,156.92
Food & Beverages in Hotel	\$-
Ground transportation- Taiwan	\$47.57
Ground transportation- Guam	\$18.36
Optional tours/ activities	\$297.56
Other expenses	\$549.82
Total Prepaid	\$782.48

Prepaid Meal Breakdown

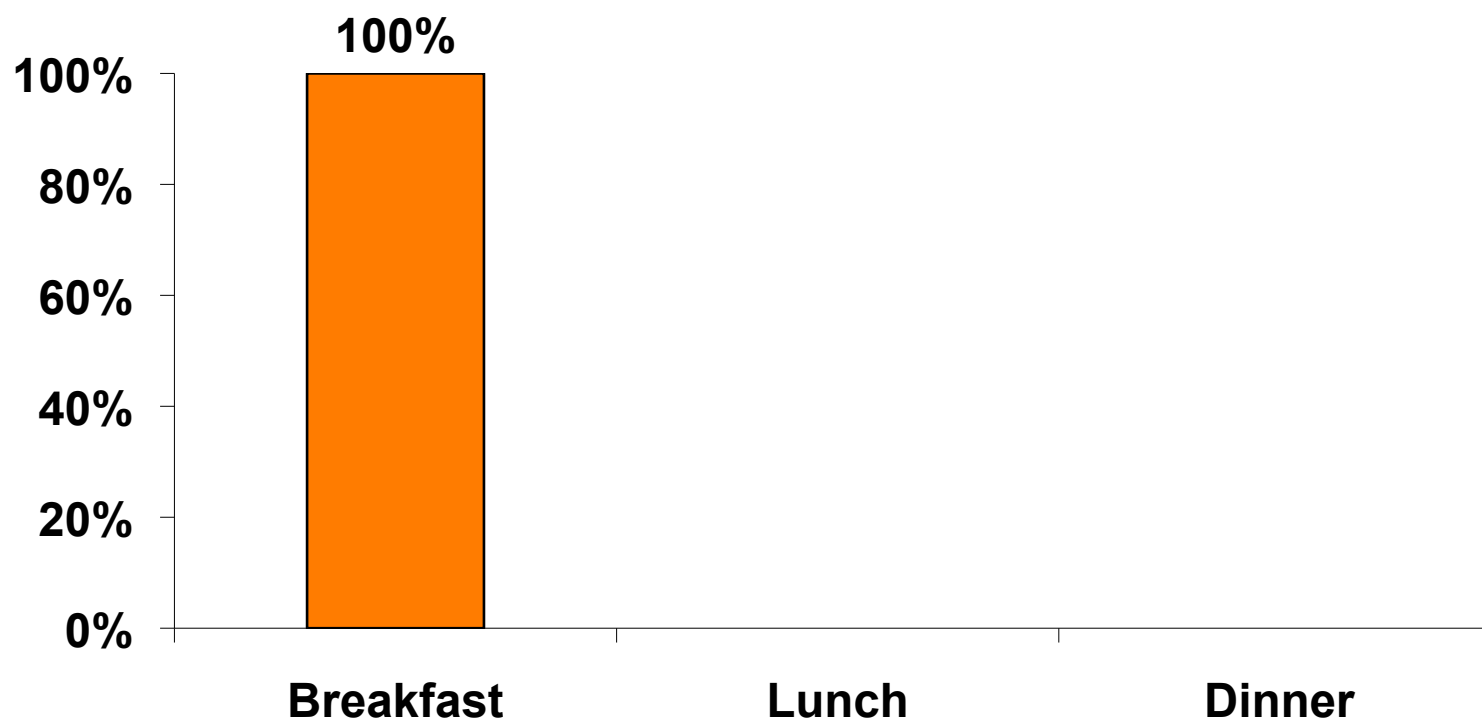
Air/ Accommodations with Daily Meal Package
n=3



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

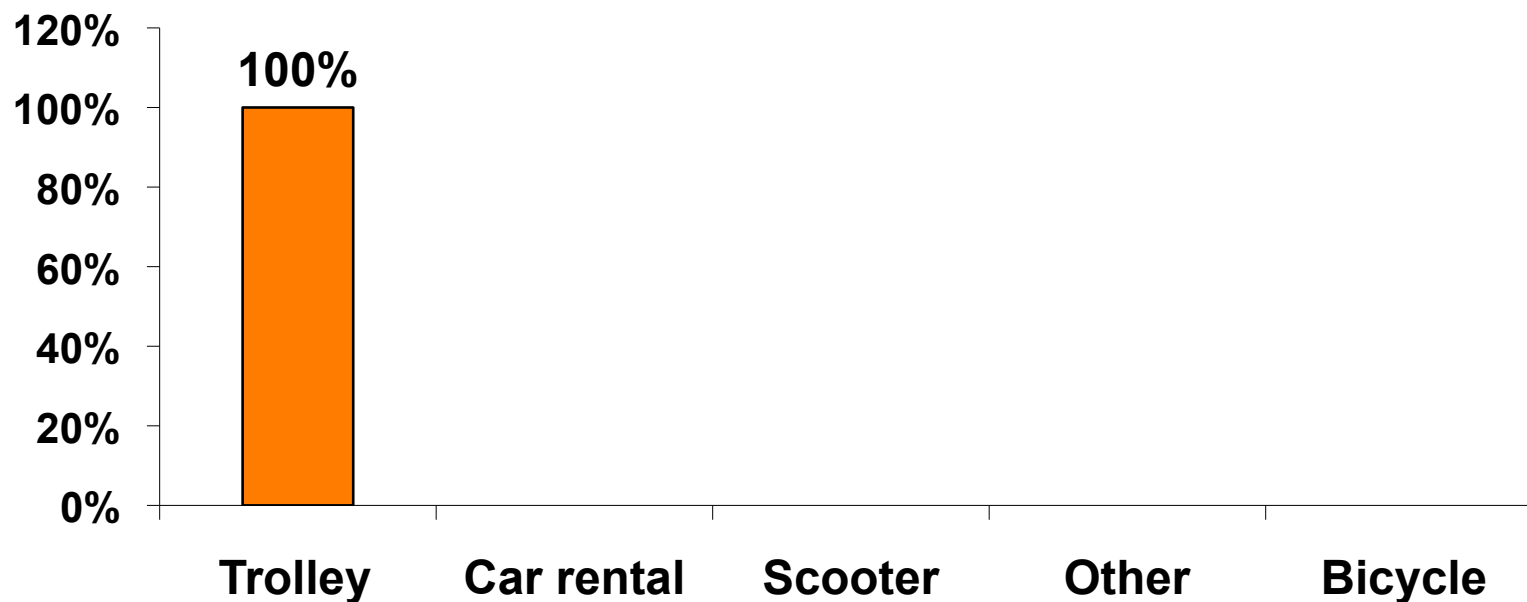
n=3



Mean=\$4,156.92 per travel party

Prepaid Ground Transportation

n= 5

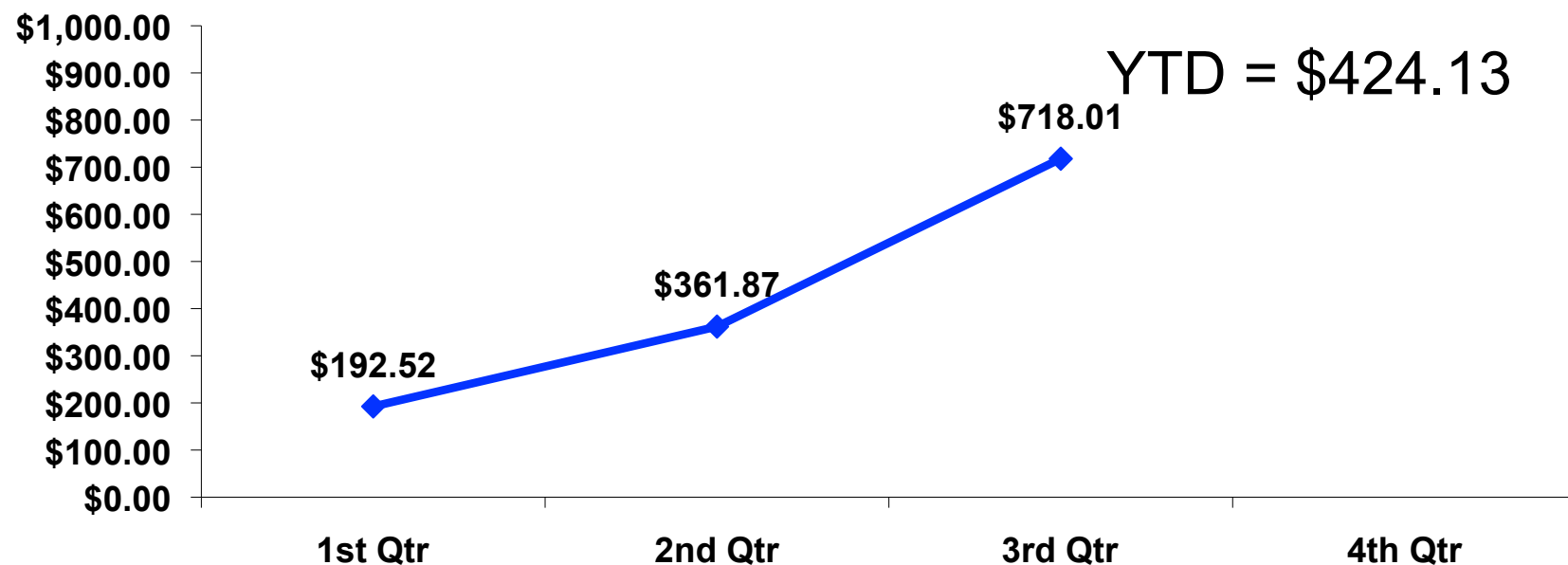


Mean=\$18.36 per travel party

On-Island Expenditures

- \$1,445.91 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$60,000 = Maximum (highest amount recorded for the entire sample)
- \$718.01 = overall mean average per person on-island expenditure

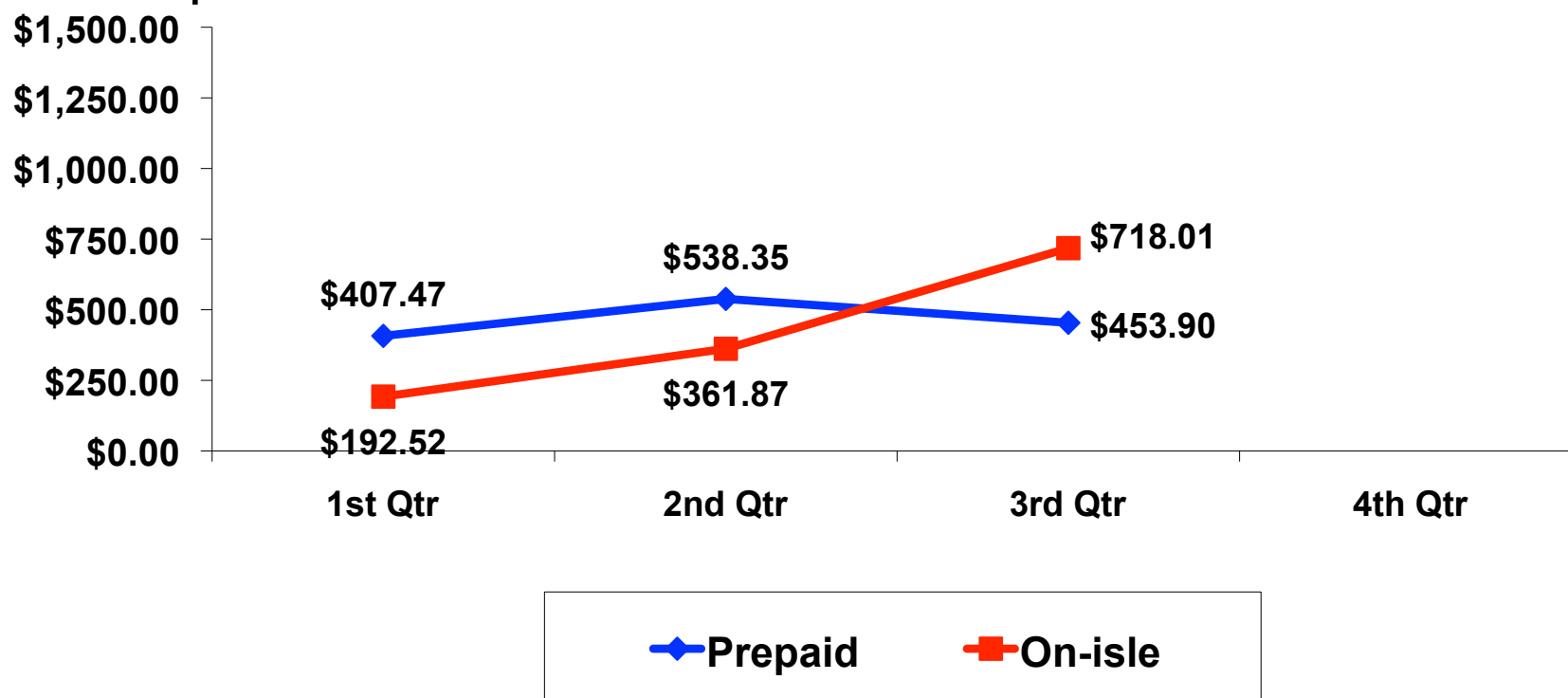
On-Island Expenditures Per Person



Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$466.57

On-Island YTD = \$424.13



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
					AGE				AGE			
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$718.01	\$527.18	\$930.34	\$422.00	\$275.29	\$511.38	\$2,141.43	\$383.40	\$333.73	\$1,979.06	\$0.00
	Median	\$186	\$178	\$200	\$340	\$0	\$133	\$340	\$333	\$239	\$193	\$0
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$30,000	\$13,750	\$30,000	\$1,000	\$1,308	\$6,667	\$13,750	\$1,017	\$3,000	\$30,000	\$0

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$43.24	\$18.52	\$70.75	\$14.29	\$18.11	\$103.30	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$15.87	\$16.39	\$15.30	\$33.36	\$17.39	\$9.36	\$12.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$154.33	\$77.09	\$240.27	\$33.36	\$21.73	\$446.06	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$161.45	\$81.76	\$250.11	\$56.93	\$32.47	\$433.09	\$62.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$223.19	\$146.27	\$308.77	\$126.64	\$96.71	\$458.83	\$312.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- OTHER	Mean	\$64.53	\$42.90	\$88.59	\$9.50	\$60.87	\$100.79	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TRANS	Mean	\$8.79	\$12.86	\$4.27	\$9.79	\$6.72	\$13.85	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$773.45	\$620.99	\$943.08	\$124.36	\$141.99	\$1,538.13	\$3,637.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$50
TOTAL	Mean	\$1,445.91	\$1,018.92	\$1,921.00	\$408.21	\$399.29	\$3,101.28	\$4,025.00
	Median	\$250	\$200	\$335	\$337	\$200	\$370	\$500

On-Island Expenditures

First Timers & Repeaters

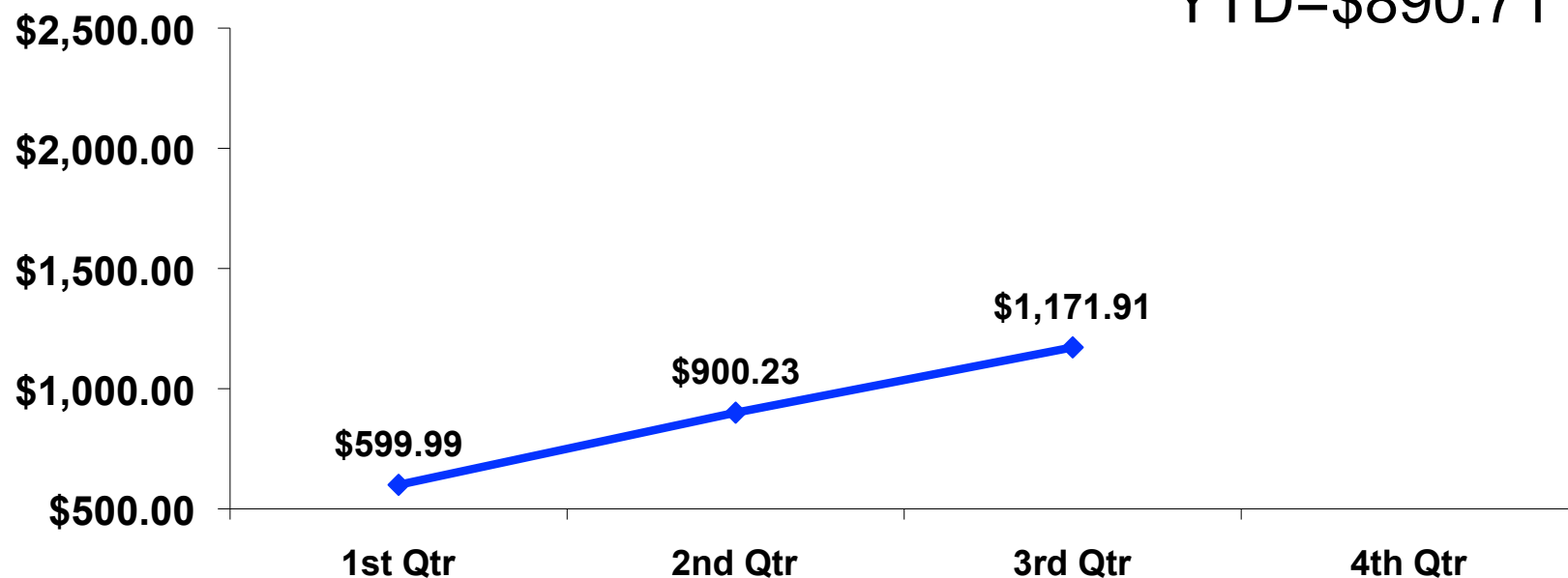
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$43.24	\$44.78	\$33.82
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$15.87	\$14.40	\$28.24
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$154.33	\$172.34	\$23.53
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$161.45	\$180.43	\$23.53
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$223.19	\$222.94	\$238.24
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$64.53	\$65.56	\$60.29
	Median	\$0	\$0	\$0
TRANS	Mean	\$8.79	\$9.75	\$1.88
	Median	\$0	\$0	\$0
OTHER	Mean	\$773.45	\$850.10	\$125.71
	Median	\$0	\$0	\$0
TOTAL	Mean	\$1,445.91	\$1,561.52	\$535.24
	Median	\$250	\$250	\$0

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,171.91 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$30,752 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

YTD=\$890.71

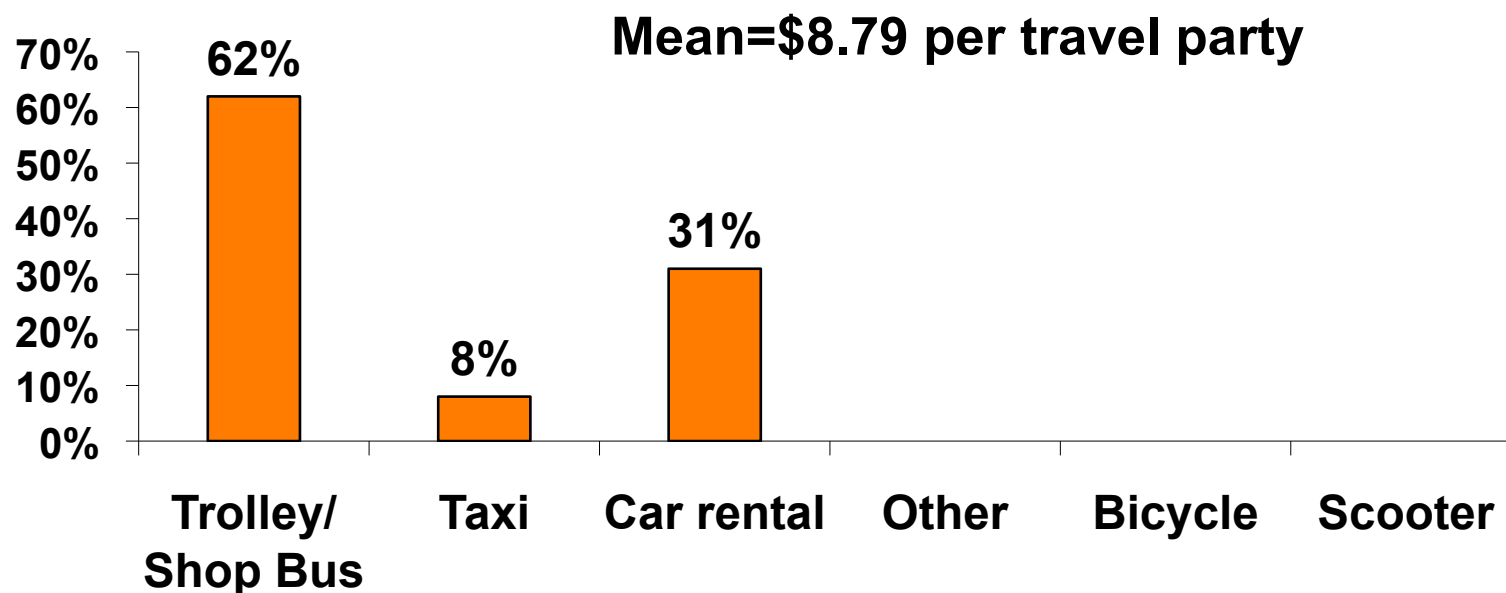


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$43.24
Food & beverage in fast food restaurant/ convenience store	\$15.87
Food & beverage at restaurants or drinking establishments outside a hotel	\$154.33
Optional tours and activities	\$161.45
Gifts/ souvenirs for yourself/companions	\$223.19
Gifts/ souvenirs for friends/family at home	\$64.53
Local transportation	\$8.79
Other expenses not covered	\$773.45
Average Total	\$1,445.91

Local Transportation

n=13



Guam Airport Expenditures

- \$17.29 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

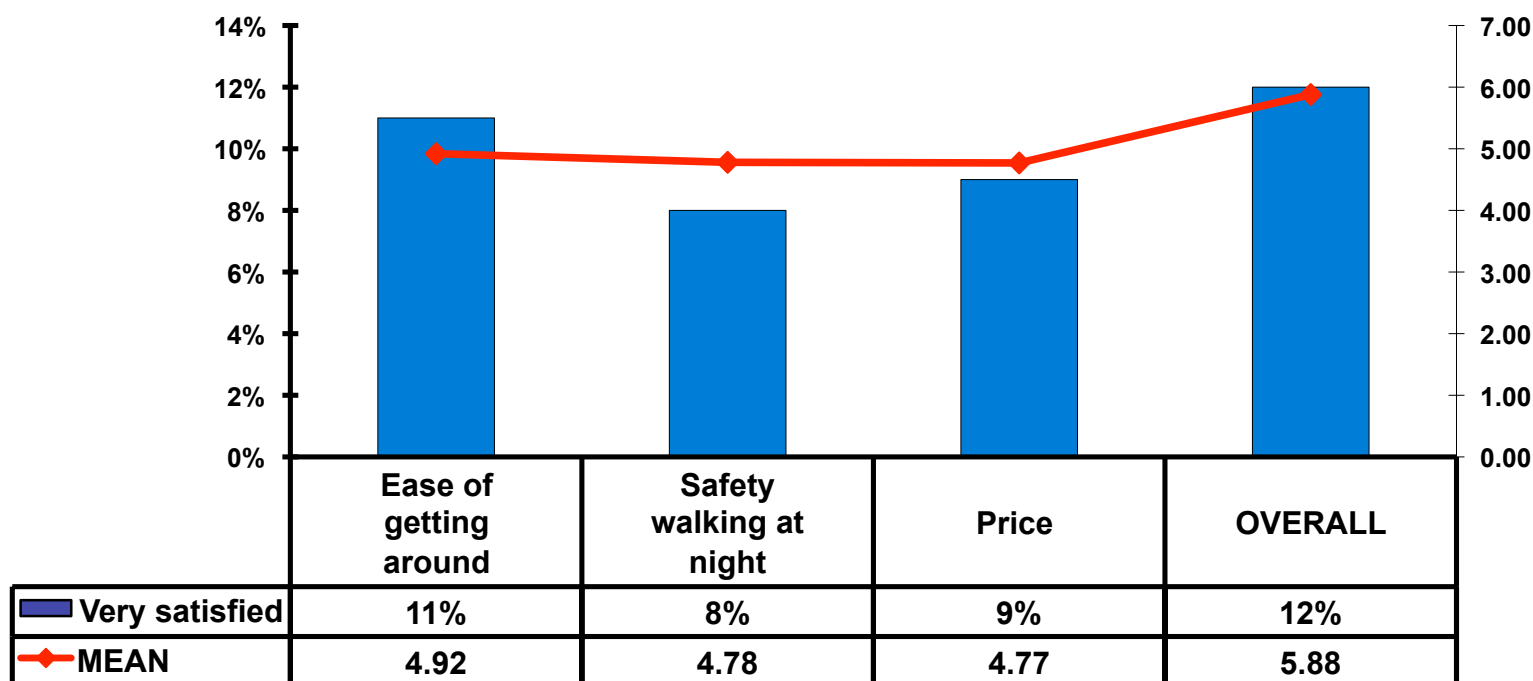
	MEAN \$
Food & Beverages	\$1.01
Gifts/Souvenirs Self	\$10.61
Gifts/Souvenirs Others	\$5.67
Total	\$17.29

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

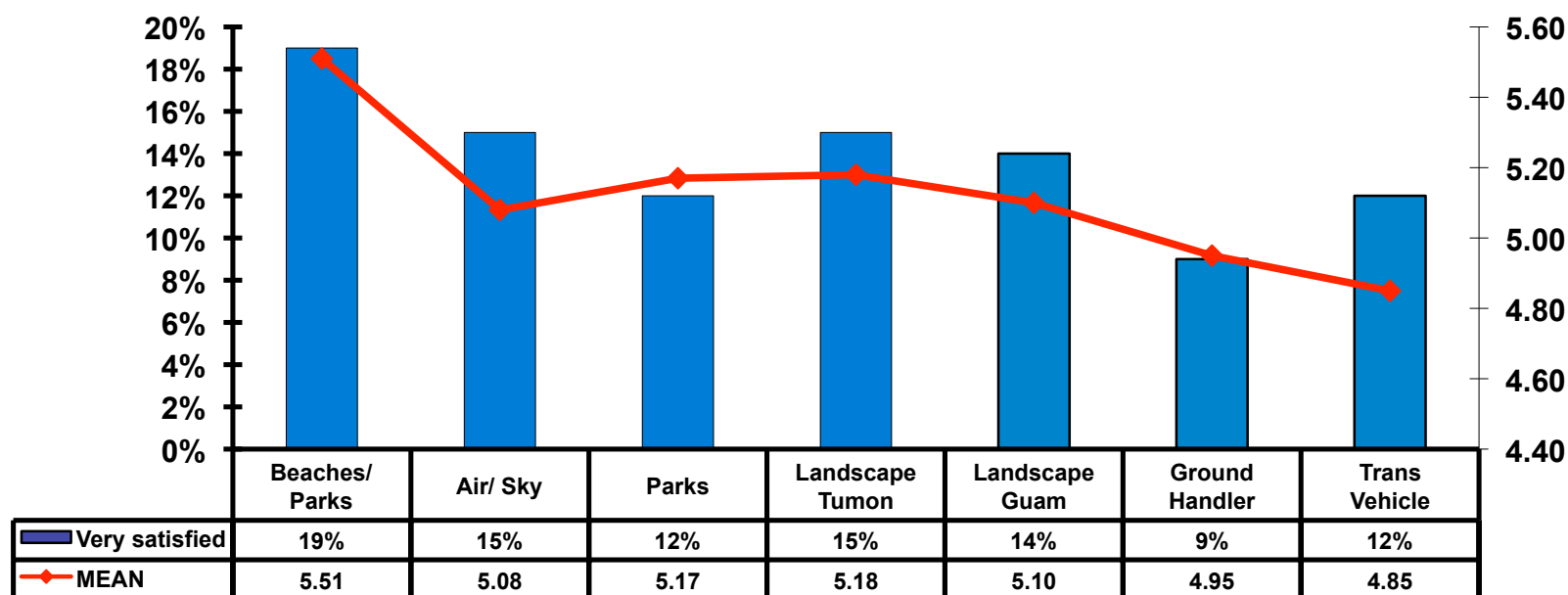
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

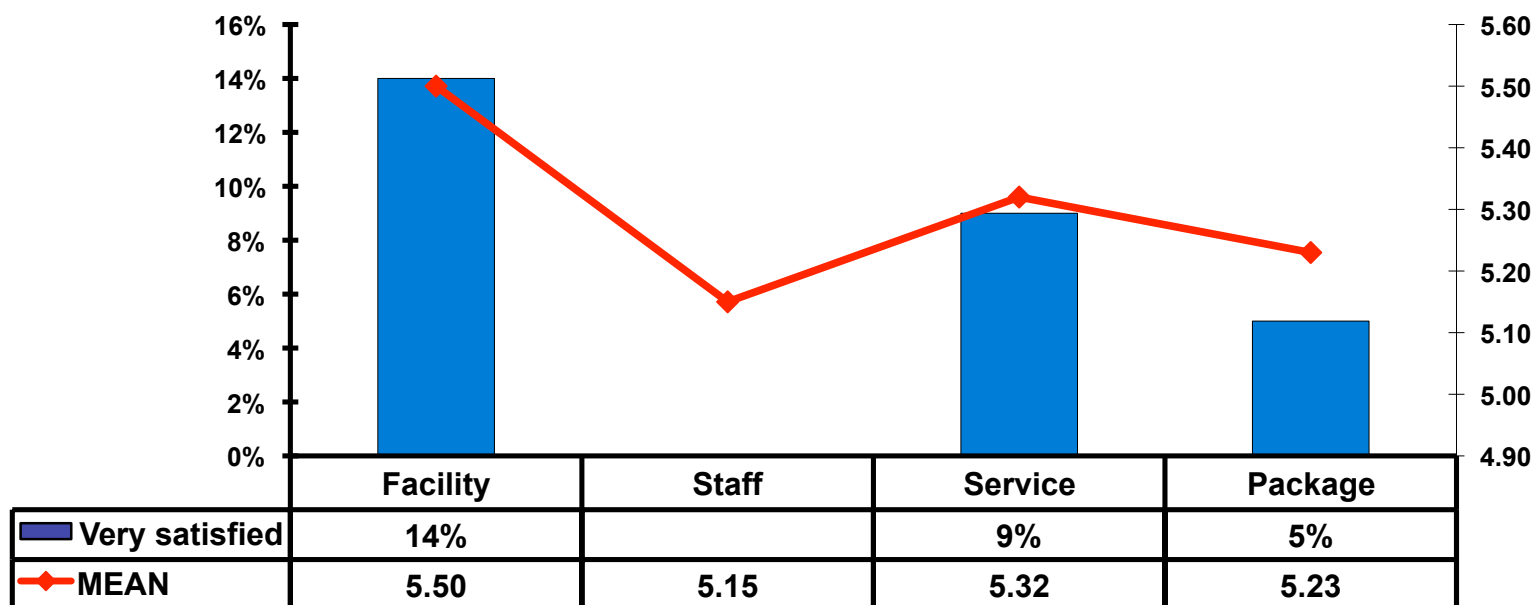
7=Very Satisfied/1=Very Dissatisfied



Wedding Satisfaction Scores

7pt Rating Scale

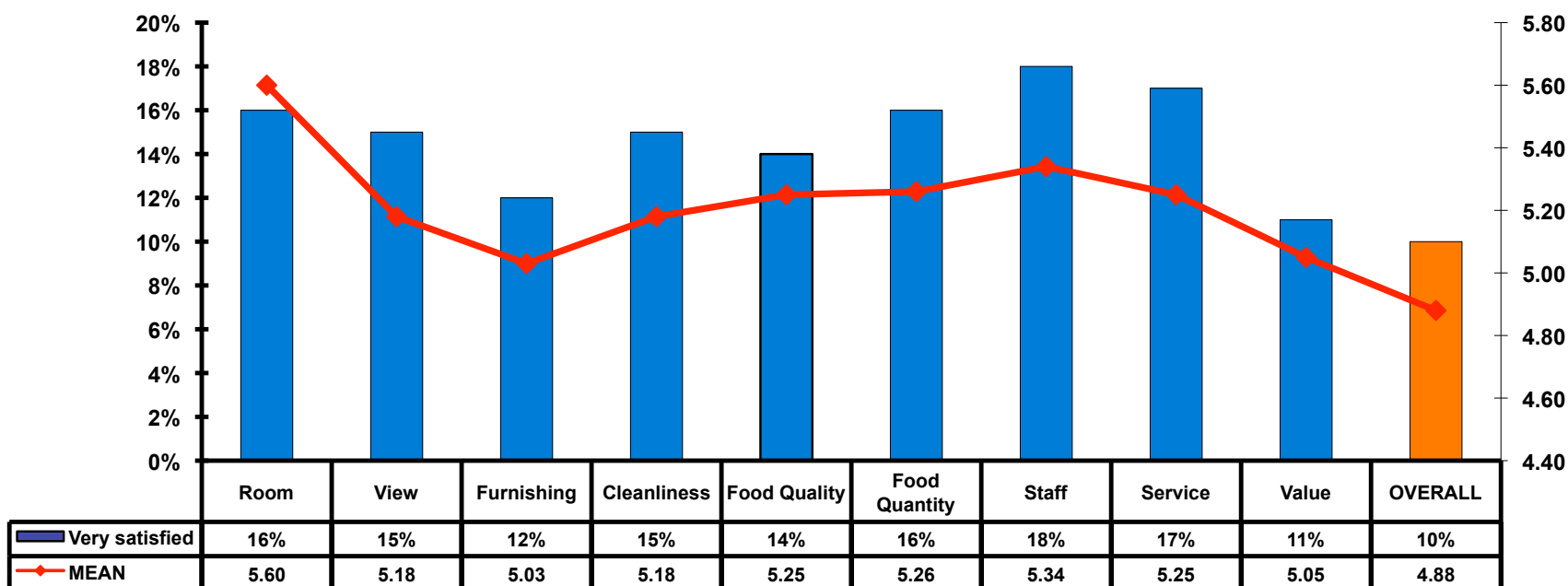
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

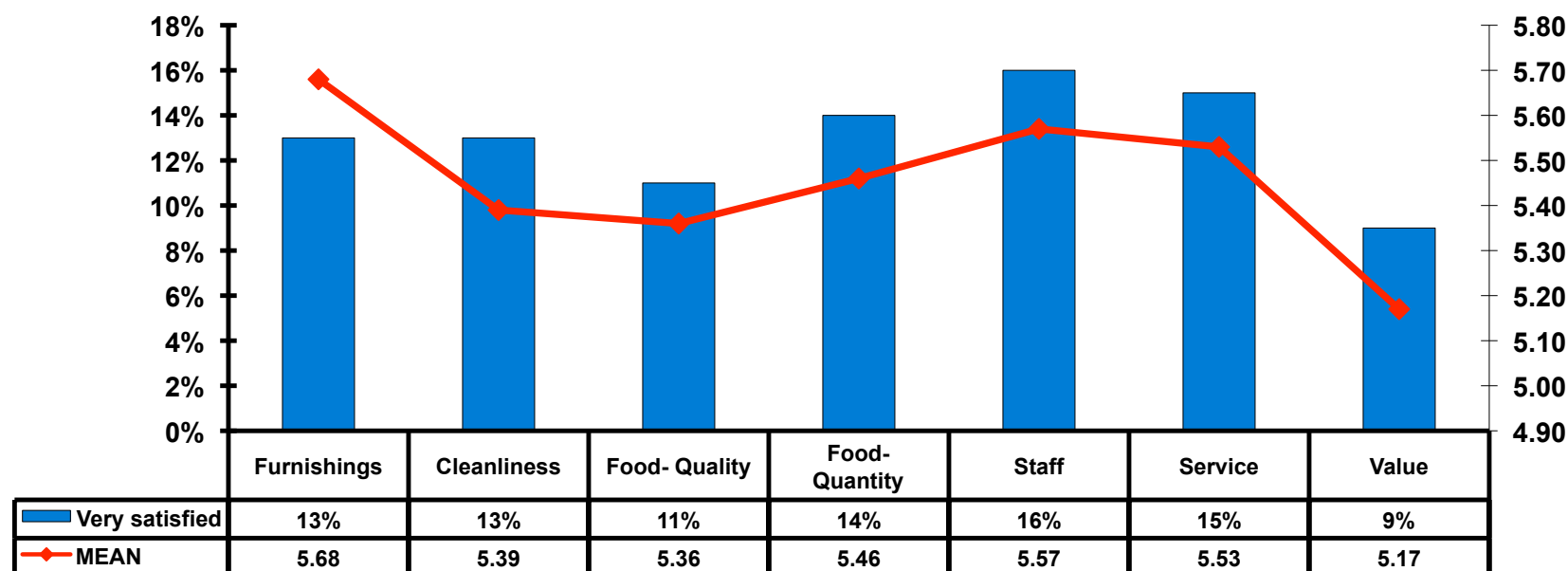
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

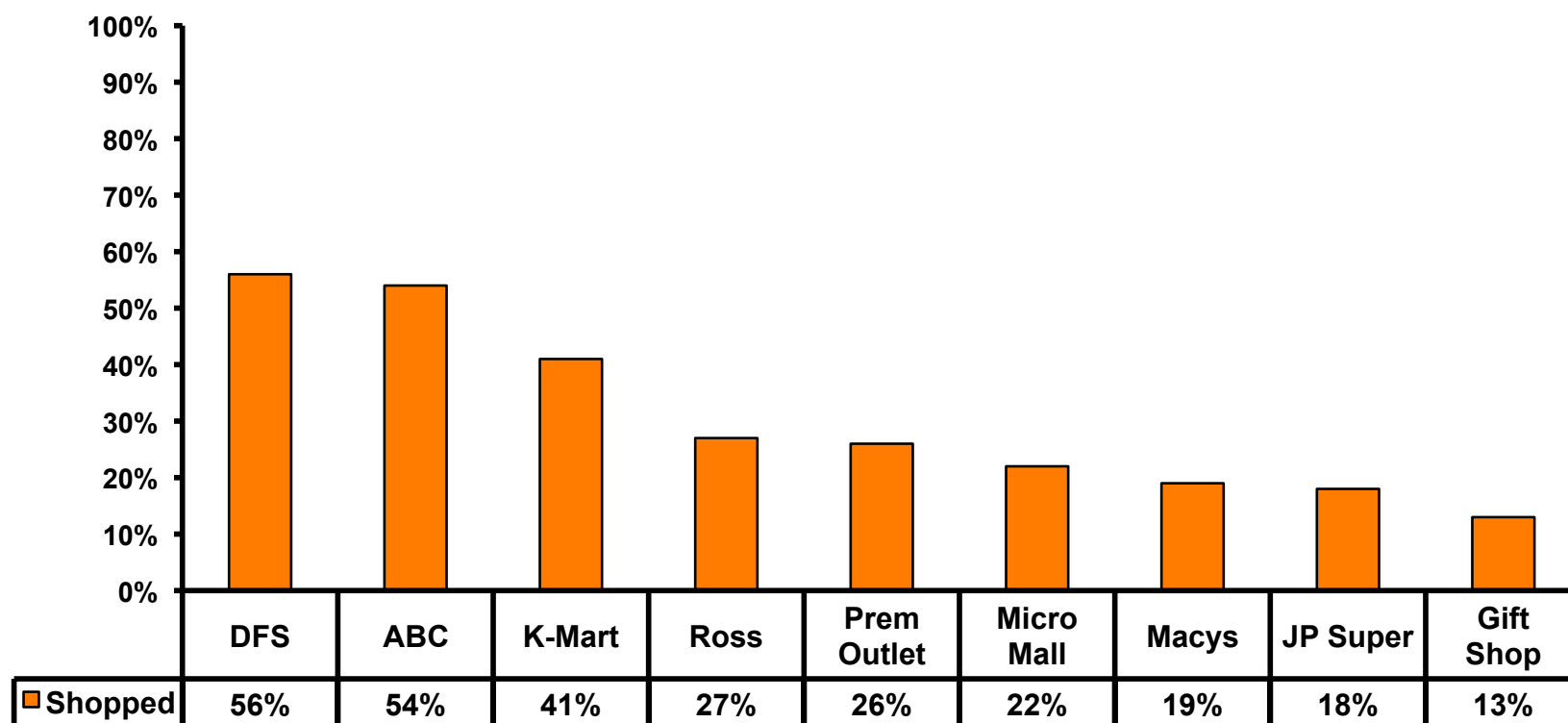
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



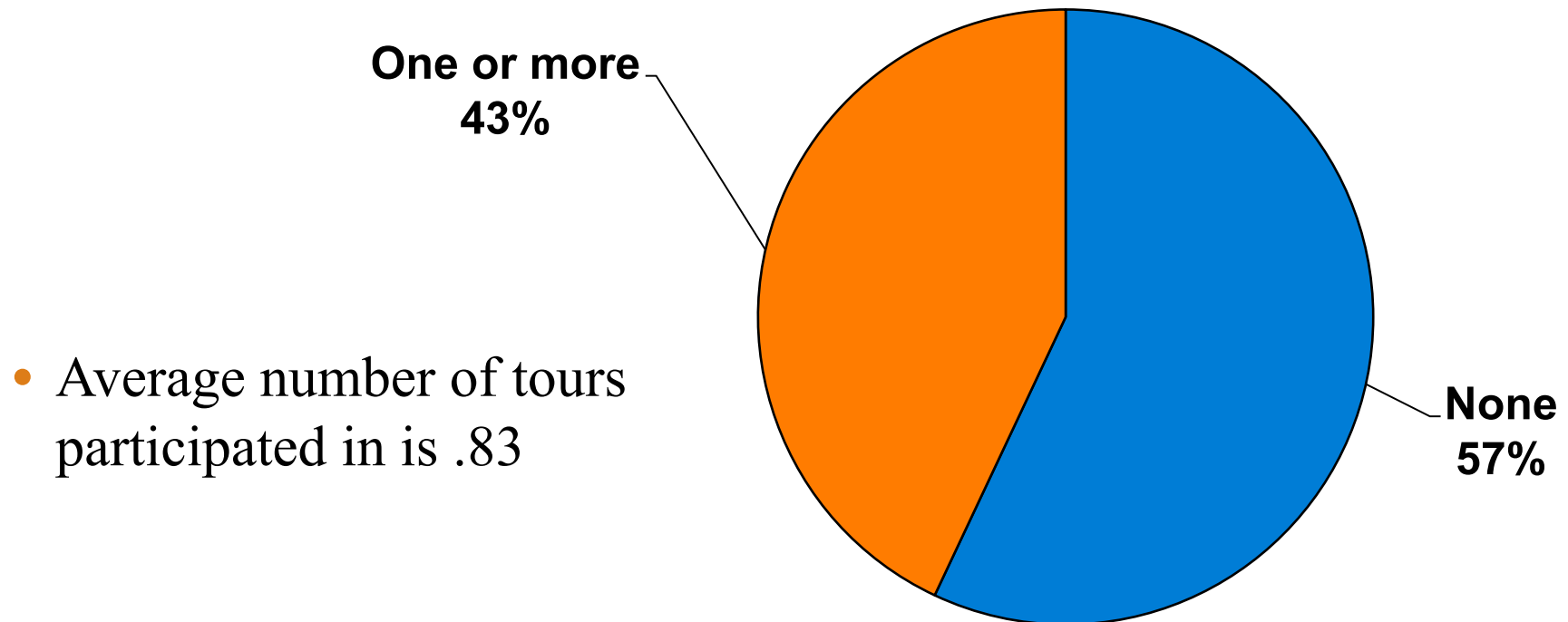
Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

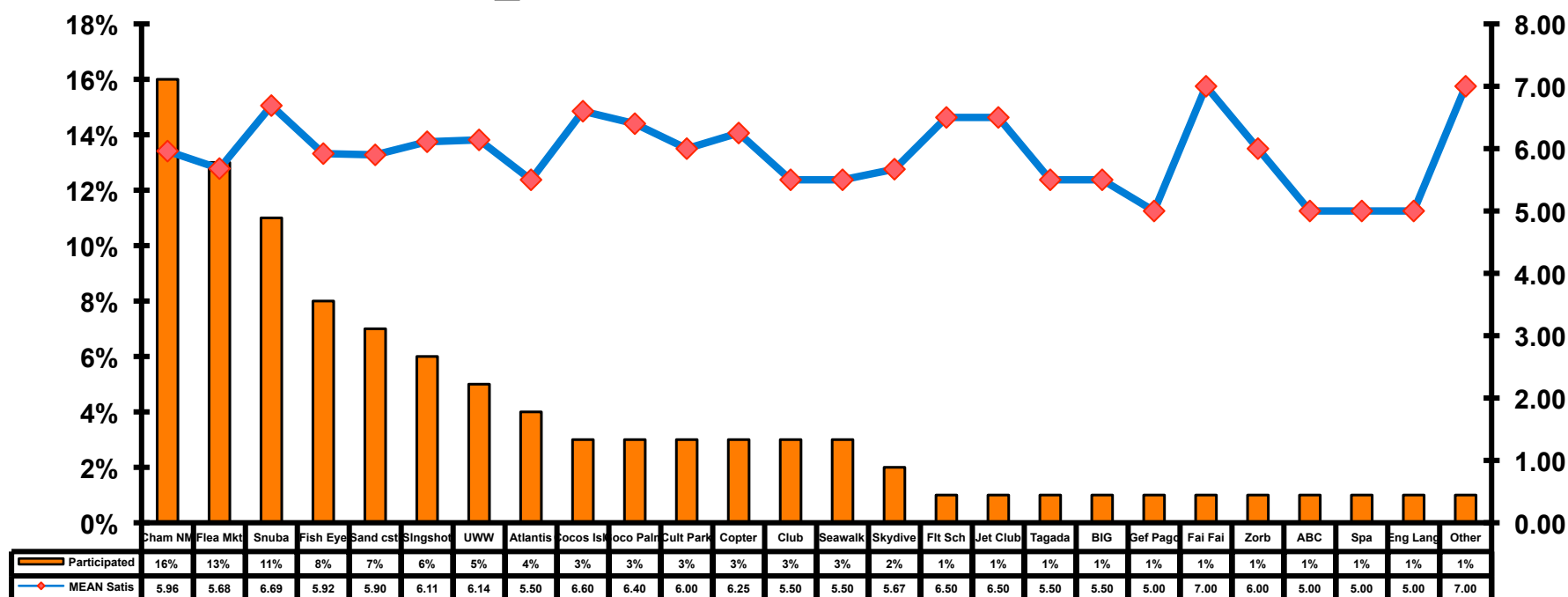
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 28%	Score of 6 to 7 = 31%
Score of 4 to 5 = 67%	Score of 4 to 5 = 61%
Score 1 to 3 = 4%	Score 1 to 3 = 9%
MEAN = 4.99	MEAN = 4.91

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 = 34%	Score of 6 to 7 = 32%
Score of 4 to 5 = 63%	Score of 4 to 5 = 61%
Score 1 to 3 = 4%	Score 1 to 3 = 7%
MEAN = 5.08	MEAN = 5.13

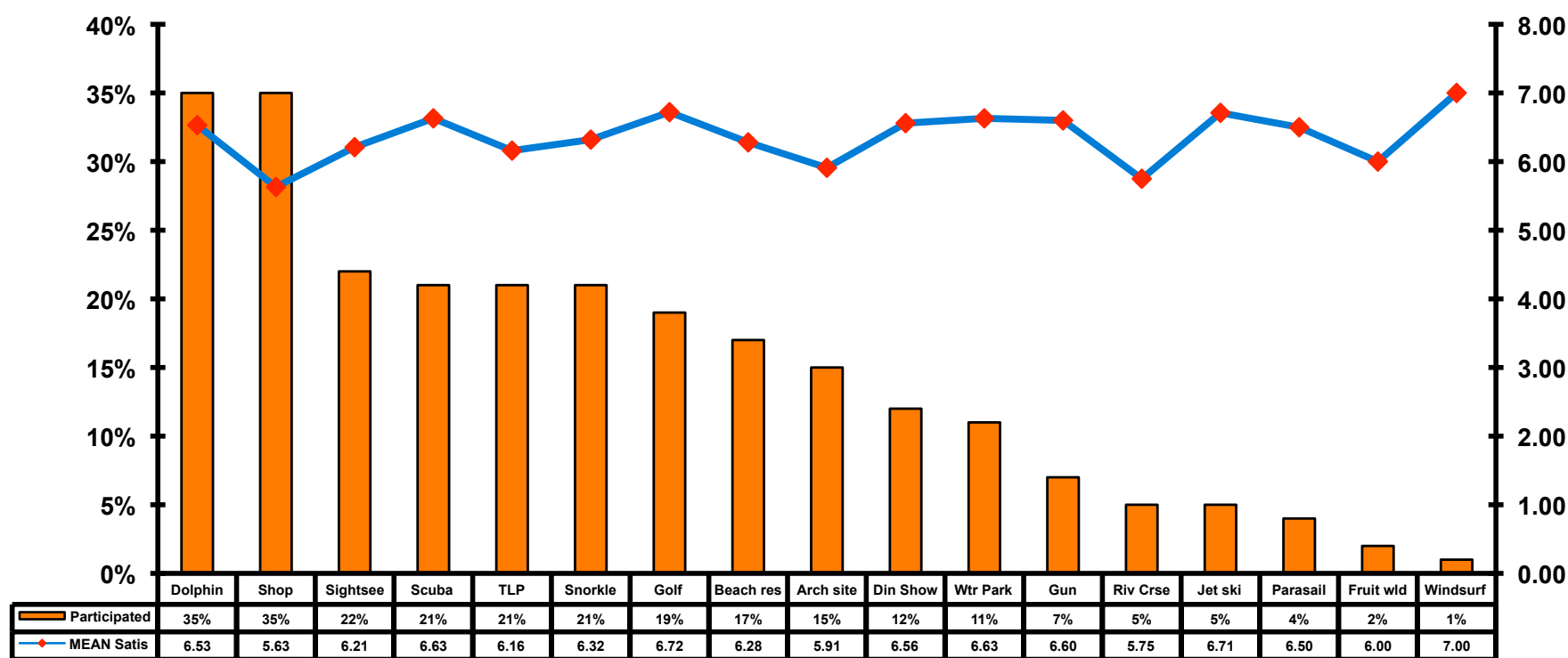
Night Tours Satisfaction

7pt Rating Scale

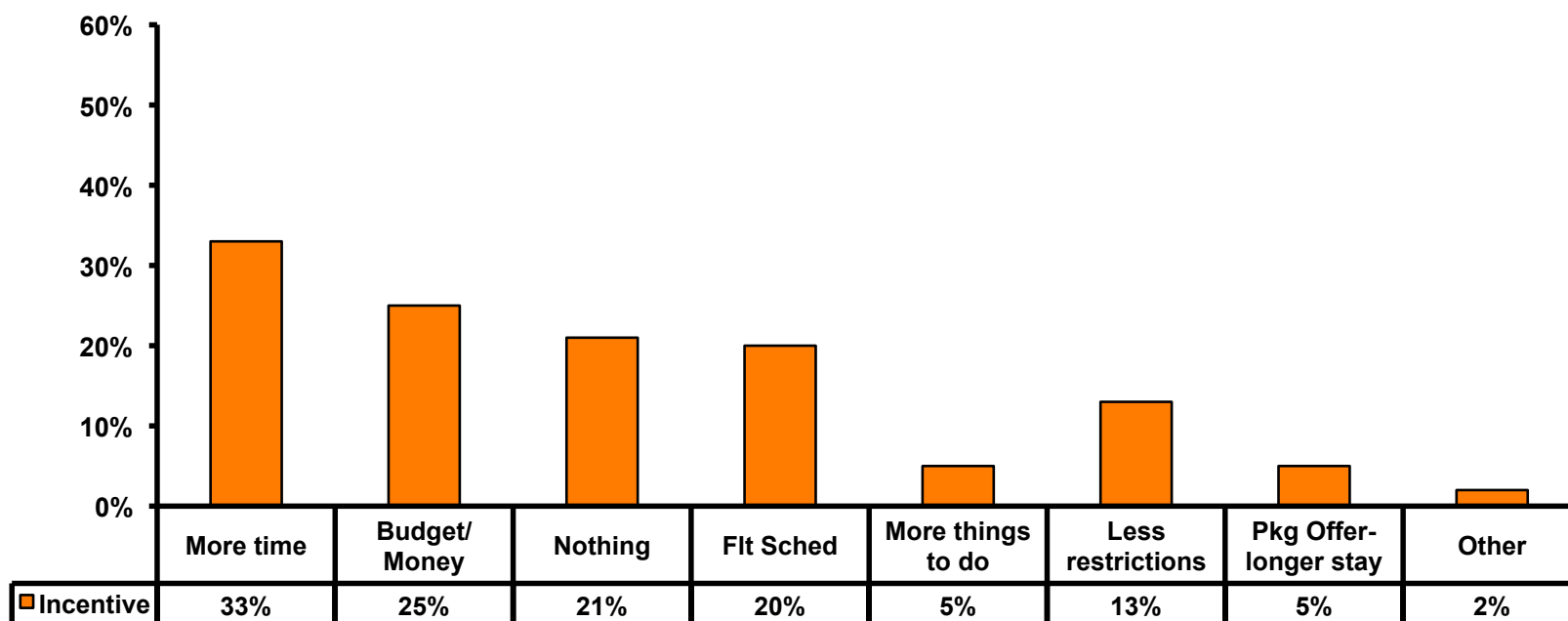
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 29%	Score of 6 to 7 = 25%
Score of 4 to 5 = 65%	Score of 4 to 5 = 70%
Score 1 to 3 = 7%	Score 1 to 3 = 6%
MEAN = 4.94	MEAN = 4.82

Satisfaction with Other Activities



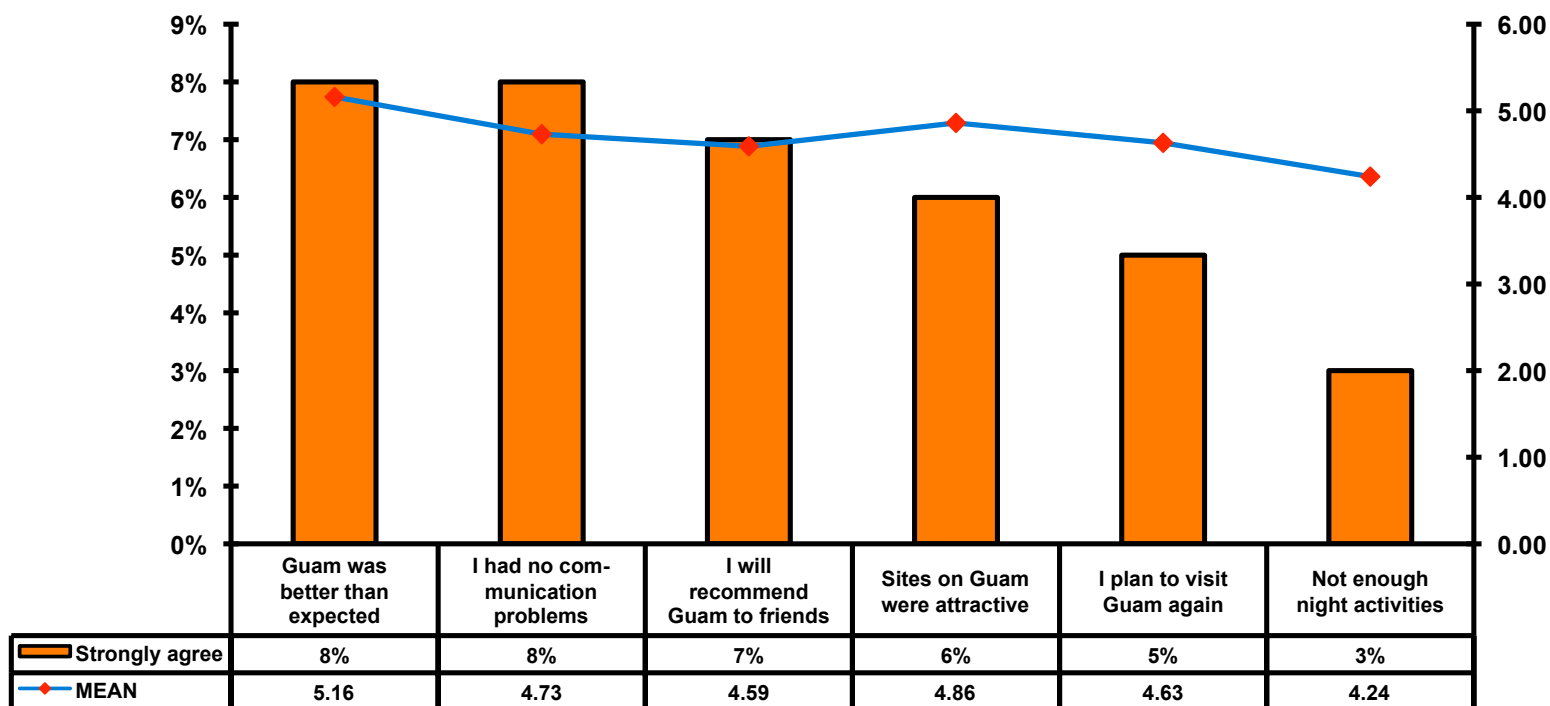
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

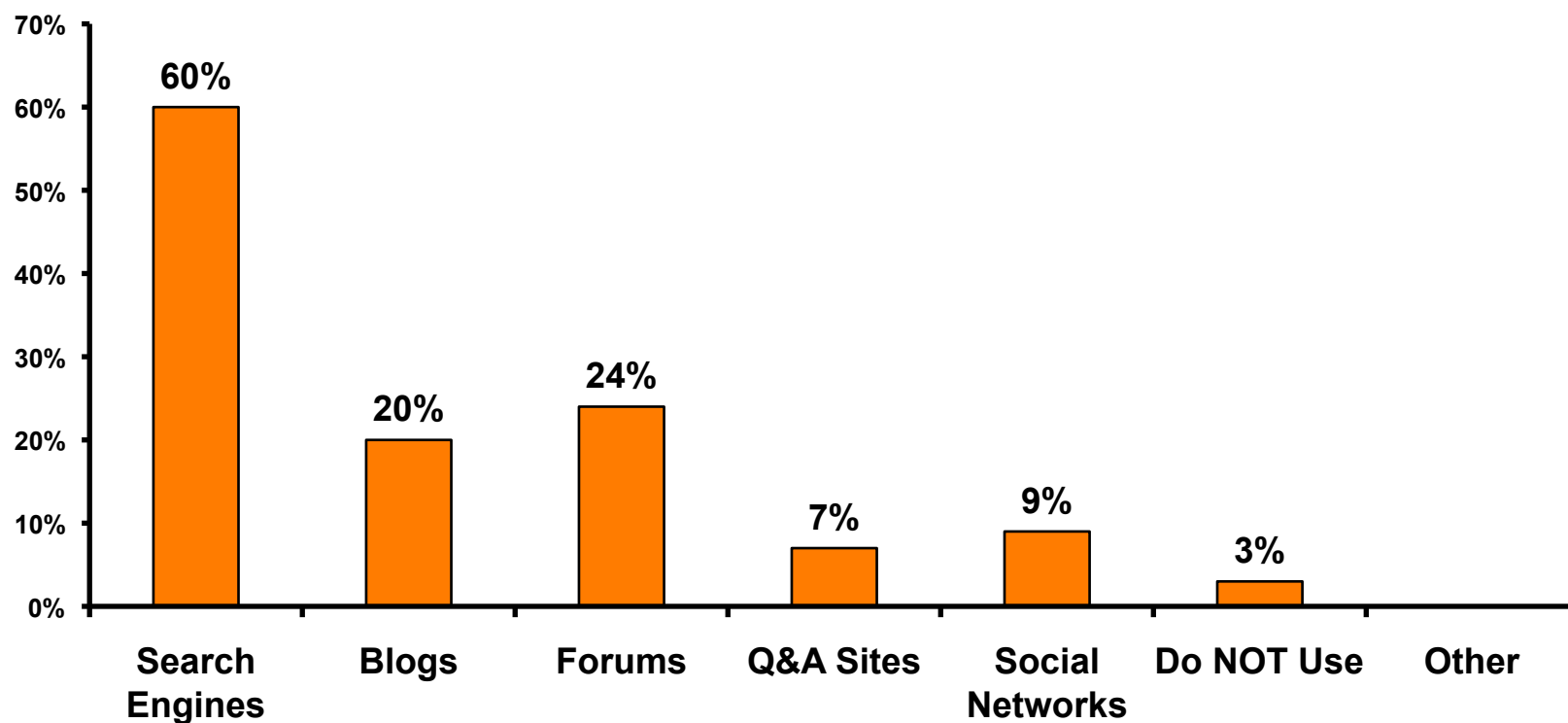
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



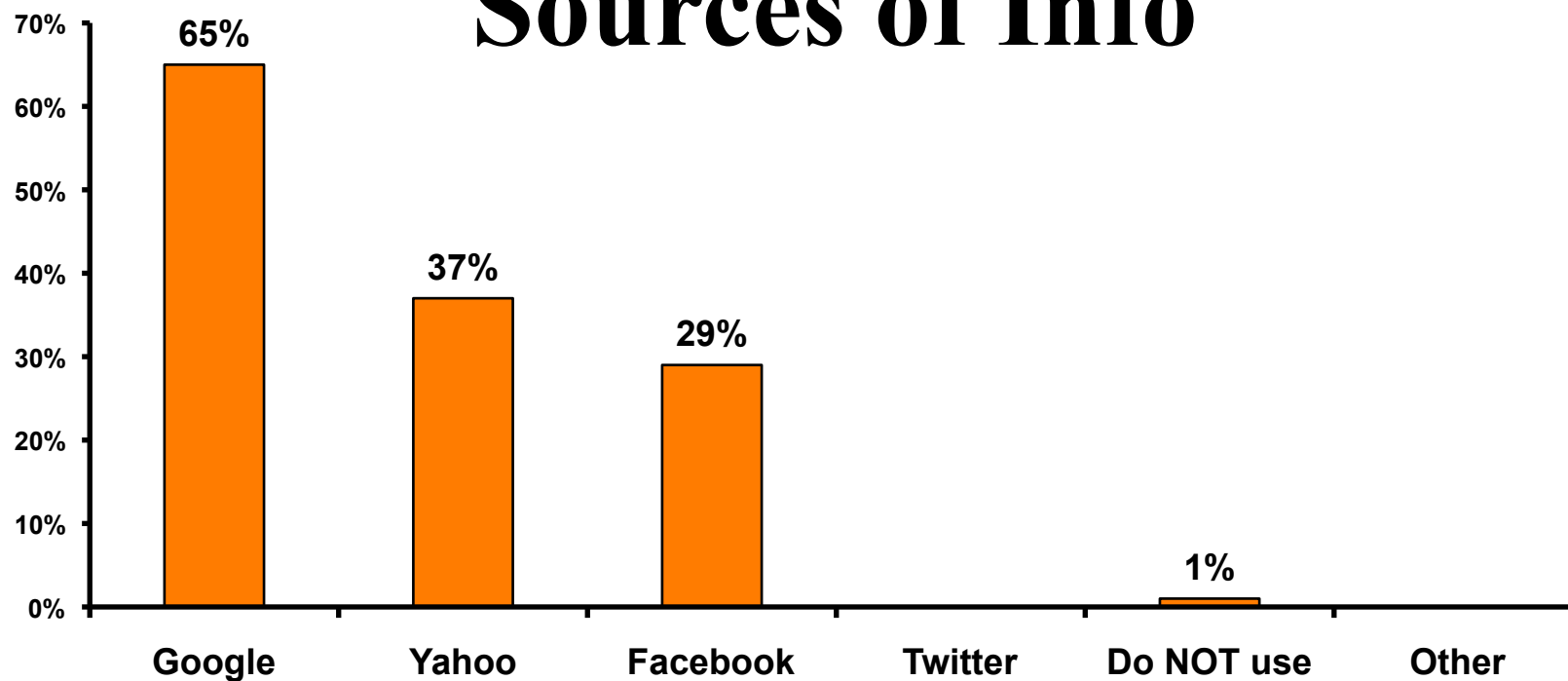
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

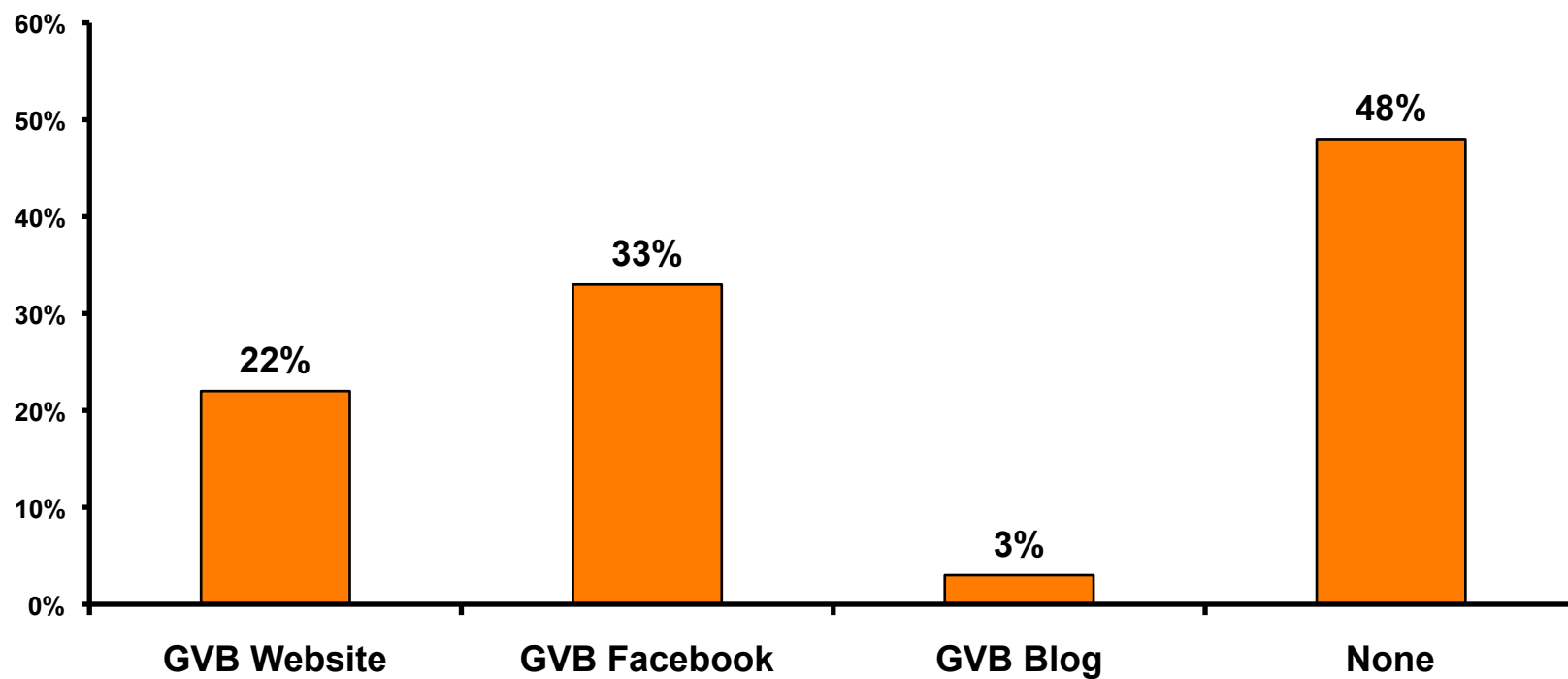


Internet- Things To Do

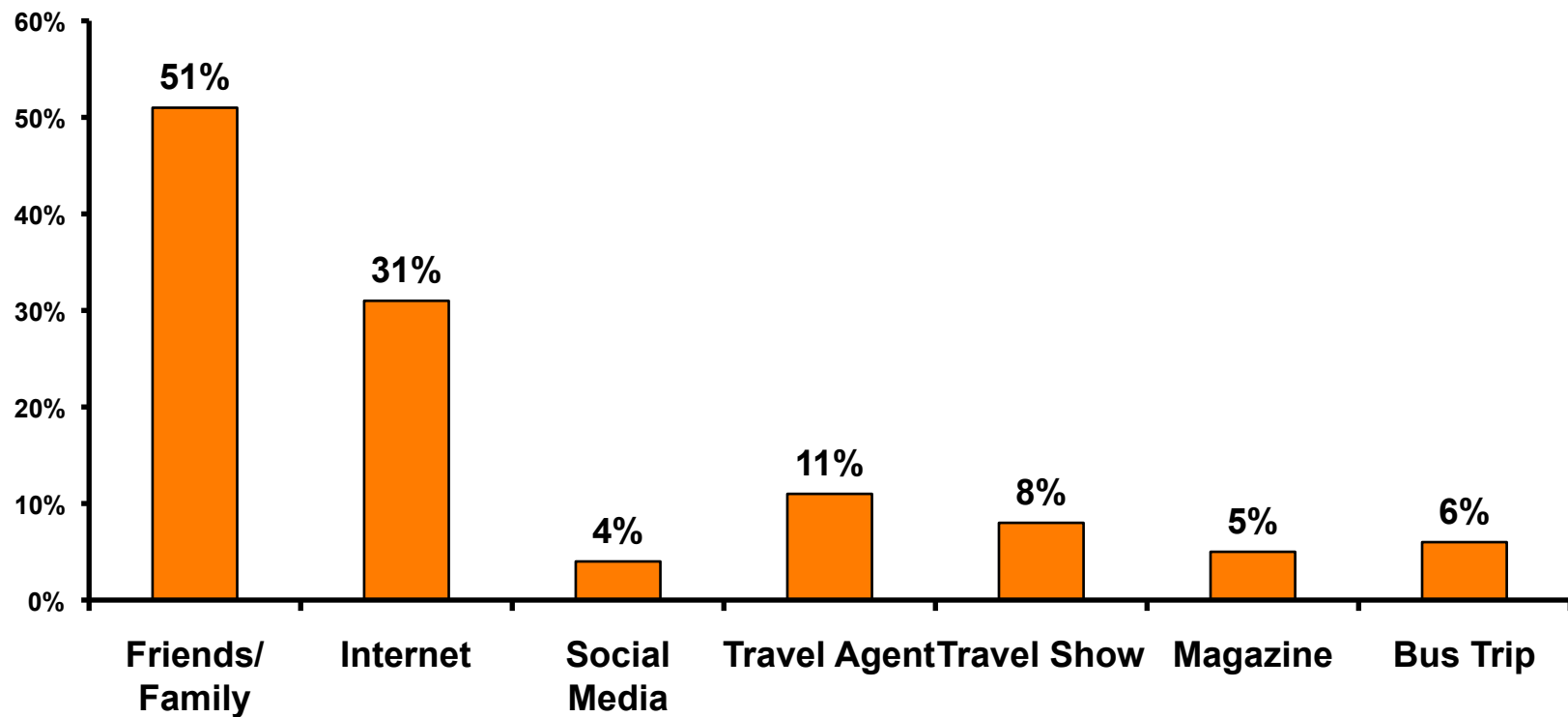
Sources of Info



Internet- GVB Sources

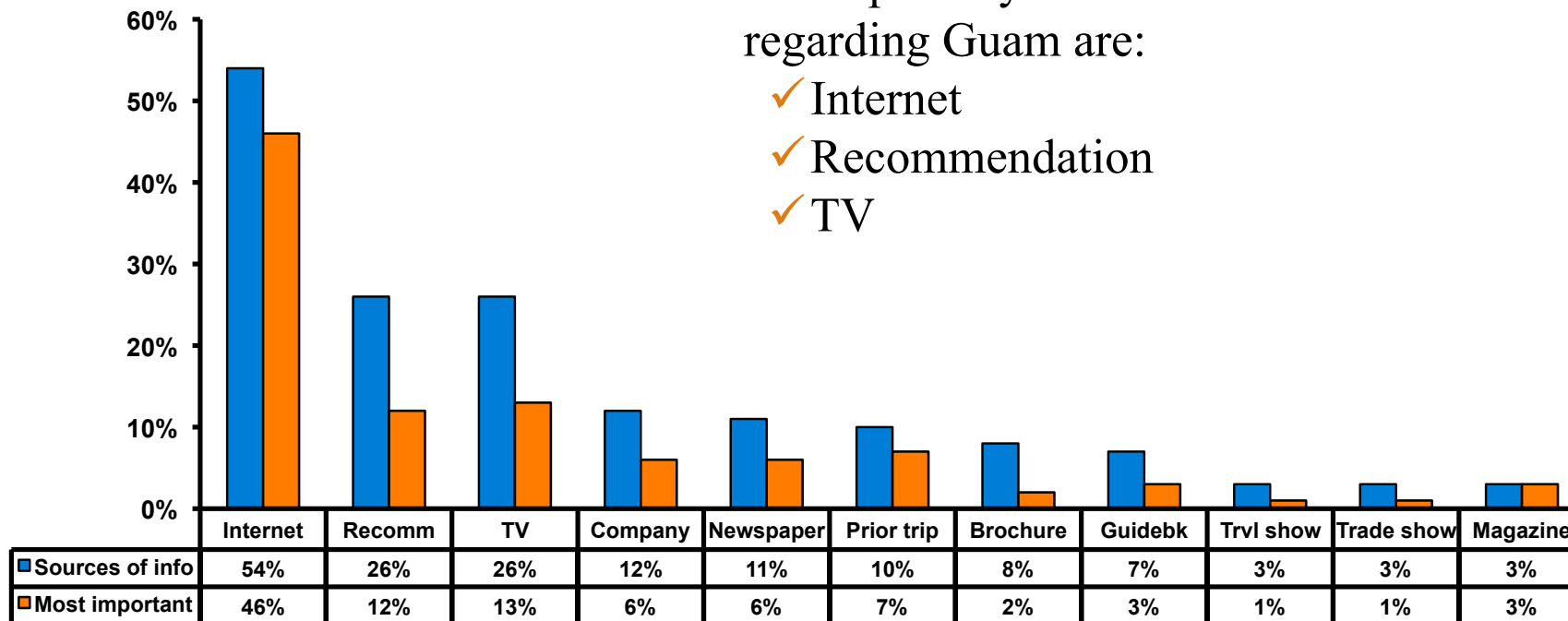


Travel Motivation- Info Sources



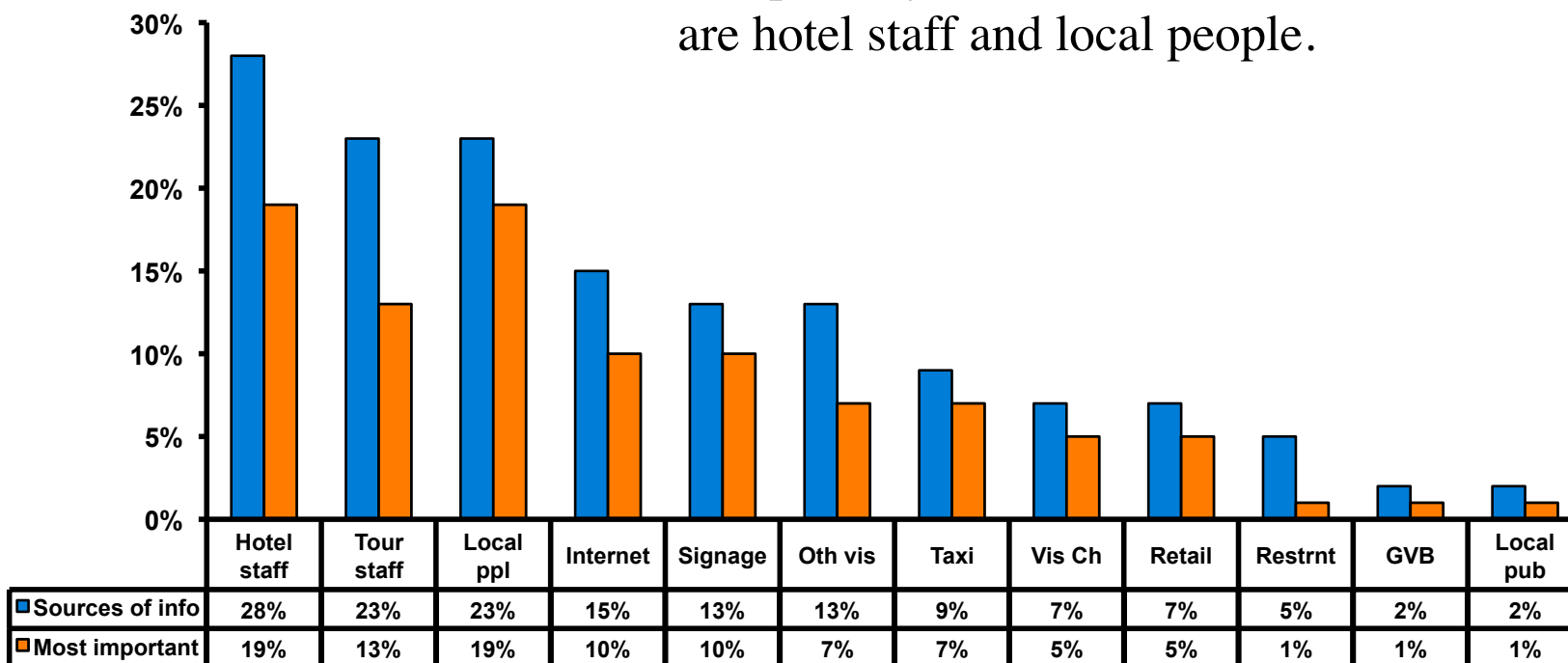
Sources of Information Pre-arrival

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



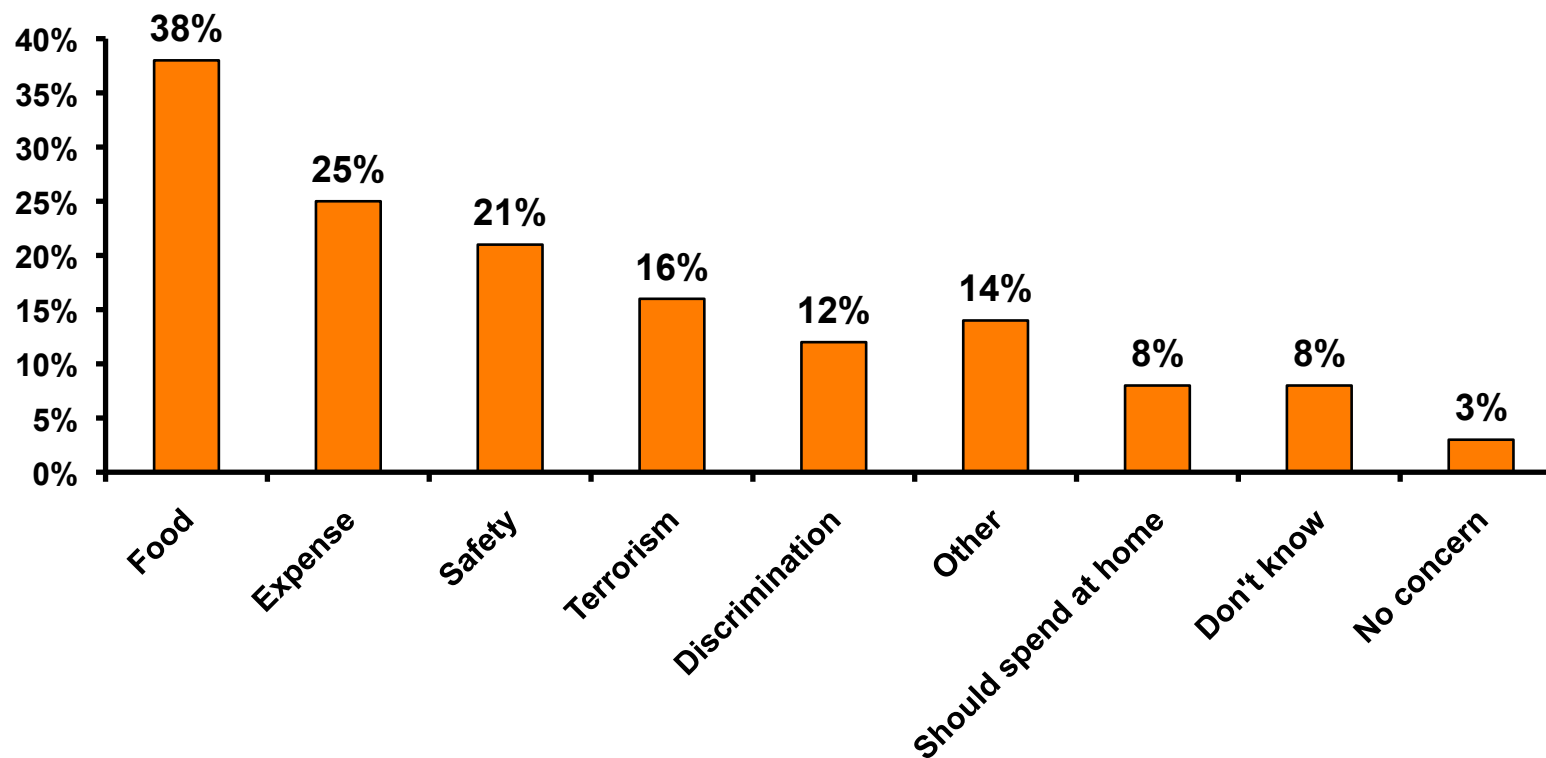
Sources of Information Post-arrival

- The primary local source of information are hotel staff and local people.



SECTION 6 **OTHER ISSUES**

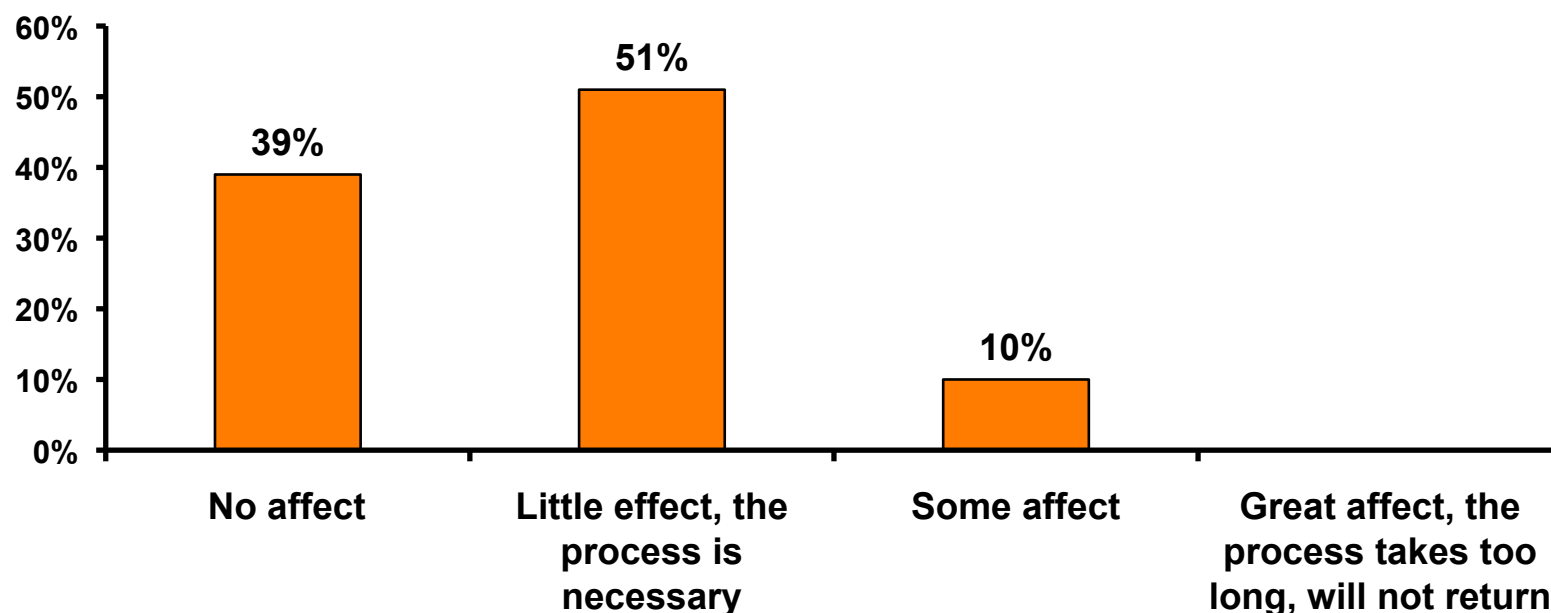
Concerns about travel outside of Taiwan - Overall



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	38%	43%	40%	34%	25%	50%	75%	50%	40%	47%	50%	43%	
	Expense	25%	43%	31%	15%		75%	100%	25%	35%	11%	25%	50%	
	Safety	21%	21%	24%	19%		100%	100%	25%	30%	11%	13%	57%	
	Terrorism	16%	29%	14%	15%	13%	25%	50%		10%	16%	13%	21%	
	Other	14%		15%	17%	13%		50%	25%	20%	9%		36%	
	Discrimination against Taiwanese	12%		14%	6%	50%			25%	5%	2%			
	Don't know	8%	14%	4%	15%		25%			5%	11%		21%	
	Should spend at home	8%		9%	11%					15%	11%			
	No concerns	3%		4%	2%				25%	5%			14%	
	Total	Count	149	14	78	47	8	4	4	4	20	45	8	14

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

