



GUAM VISITORS BUREAU

Taiwan Visitor Tracker Exit Profile

FY2013 Market Segmentation

4TH Qtr. (JUL~SEPT 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

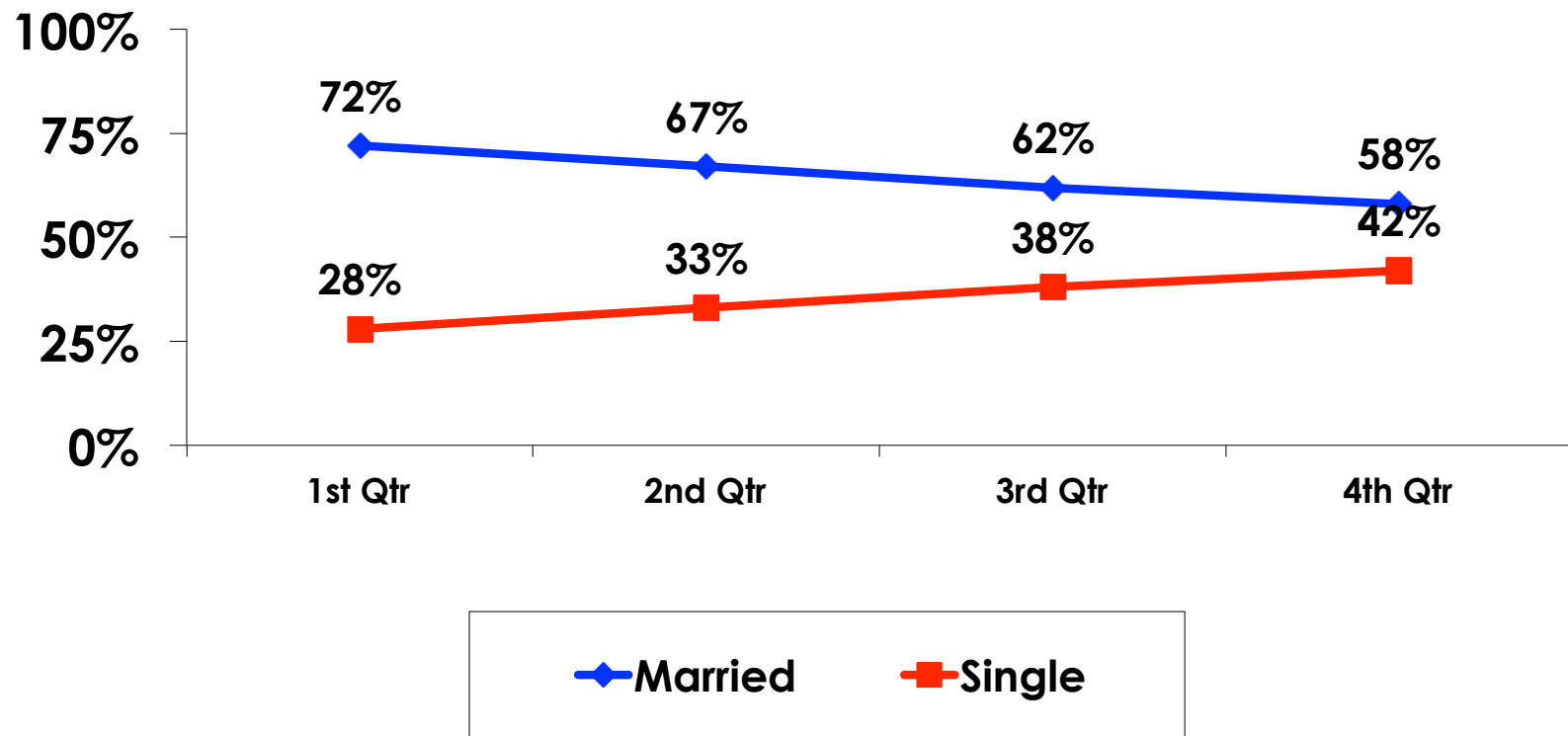
- General leisure group – Q.5A
- Family and/or Child – Q.6
- Special interest group – Q.18/Q7
- Incentive market – Q.5A/Q.7
- 20-40 year old – Q.F
- Mid-high level income – Q.26
- White-collar – Q.25
- W/child – Q.6
- Wedding/ Honeymoon – Q.5A/ Q.13
- Student –Q.25

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
General leisure group	23%	24%	35%	27%
Child	9%	17%	7%	12%
Incentive market	3%	3%	3%	1%
Male 20-40	39%	41%	43%	45%
Female 20-40	39%	41%	37%	42%
White collar	49%	53%	56%	54%
Wedding/ Honeymooner	9%	14%	8%	8%
Student	2%	3%	3%	2%
Mid-High income	26%	35%	43%	46%
TOTAL	154	150	150	150

SECTION 1 **PROFILE OF RESPONDENTS**

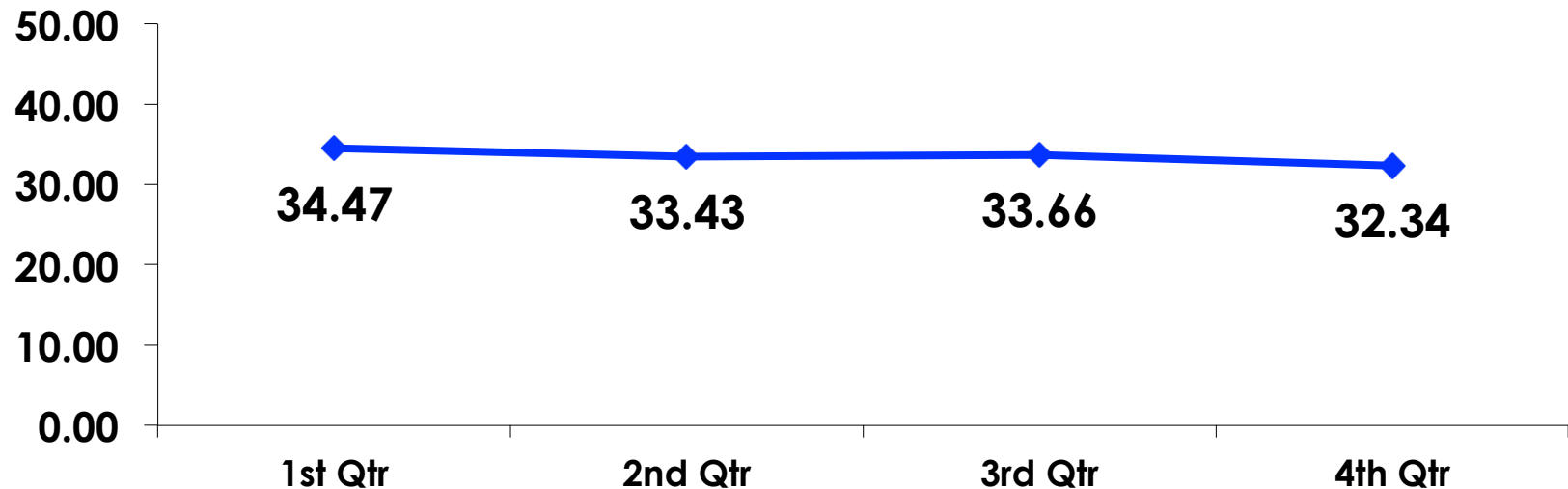
MARITAL STATUS - TRACKING



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	87	23	15	1	36	31	49	9	1	46
		Column N %	58%	58%	83%	100%	54%	49%	60%	75%	33%	67%
	Single	Count	63	17	3	0	31	32	32	3	2	23
		Column N %	42%	43%	17%	0%	46%	51%	40%	25%	67%	33%
	Total	Count	150	40	18	1	67	63	81	12	3	69

AVERAGE AGE - TRACKING



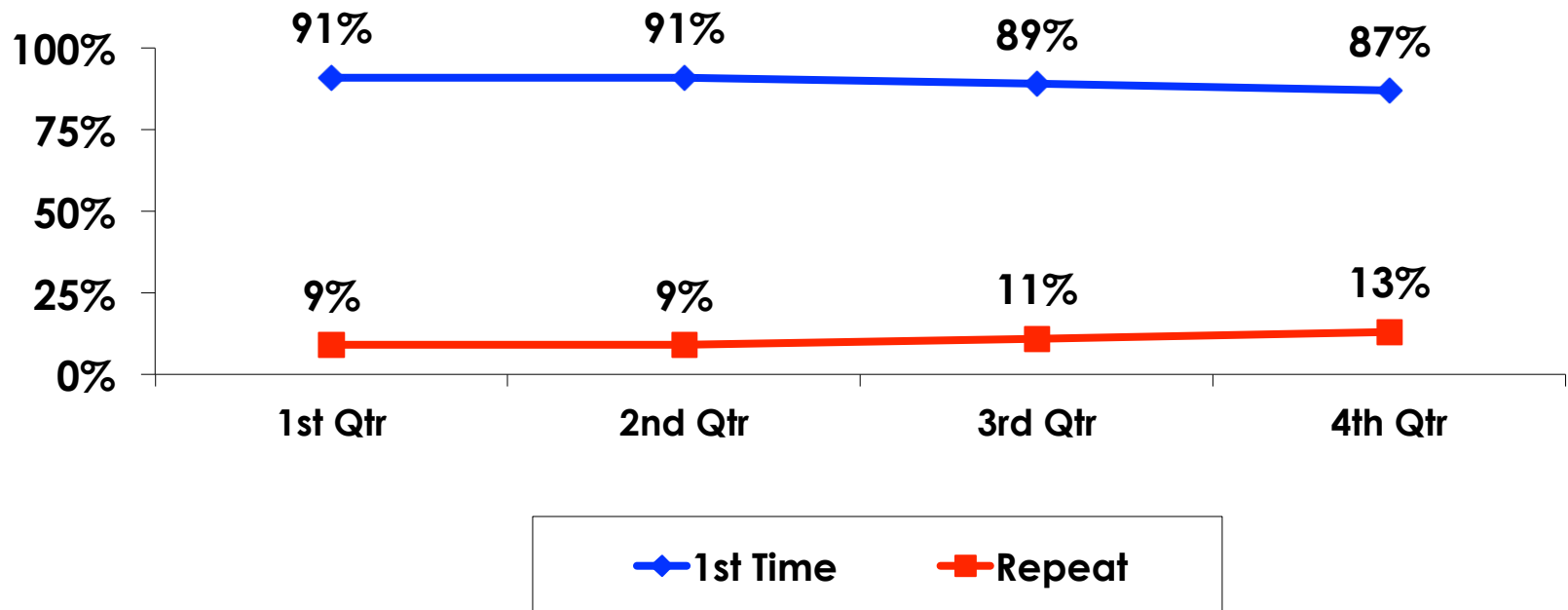
AGE- SEGMENTATION

			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	4	2	0	5	5	3	1	3	4
		Column N %	7%	10%	11%	0%	7%	8%	4%	8%	100%	6%
	25-34	Count	92	25	7	0	47	45	50	10	0	41
		Column N %	62%	63%	39%	0%	70%	71%	63%	83%	0%	59%
	35-49	Count	41	9	9	1	15	13	23	1	0	20
		Column N %	28%	23%	50%	100%	22%	21%	29%	8%	0%	29%
	50+	Count	5	2	0	0	0	0	4	0	0	4
		Column N %	3%	5%	0%	0%	0%	0%	5%	0%	0%	6%
	Total	Count	149	40	18	1	67	63	80	12	3	69
		Column N %	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
QF	Mean		32.34	31.90	33.94	40.00	30.64	30.37	33.26	29.75	20.33	33.57
	Median		31	31	35	40	31	30	31	31	21	31

INCOME - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	MID INCOME	
			-	-	-	-	-	-	-	-	-	
Q26	<=NT160K	Count	3	2	0	0	1	2	2	1	0	
		Column N %	3%	6%	0%	0%	2%	4%	3%	8%	0%	
	NT160K-NT200K	Count	2	1	0	0	0	2	2	1	0	
		Column N %	2%	3%	0%	0%	0%	4%	3%	8%	0%	
	NT200K-NT400K	Count	10	1	0	0	7	3	6	1	0	
		Column N %	9%	3%	0%	0%	14%	6%	8%	8%	0%	
	NT400K-NT600K	Count	38	13	6	0	12	24	29	3	38	
		Column N %	34%	37%	43%	0%	24%	51%	39%	25%	55%	
	NT600K-NT800K	Count	31	11	7	1	14	7	20	5	31	
		Column N %	27%	31%	50%	100%	28%	15%	27%	42%	45%	
	NT800K-NT1.0M	Count	8	2	1	0	2	4	5	0	0	
		Column N %	7%	6%	7%	0%	4%	9%	7%	0%	0%	
	NT1.0M+	Count	20	5	0	0	13	5	11	1	0	
		Column N %	18%	14%	0%	0%	26%	11%	15%	8%	0%	
	No Income	Count	1	0	0	0	1	0	0	0	0	
		Column N %	1%	0%	0%	0%	2%	0%	0%	0%	0%	
	Total		Count	113	35	14	1	50	47	75	12	69

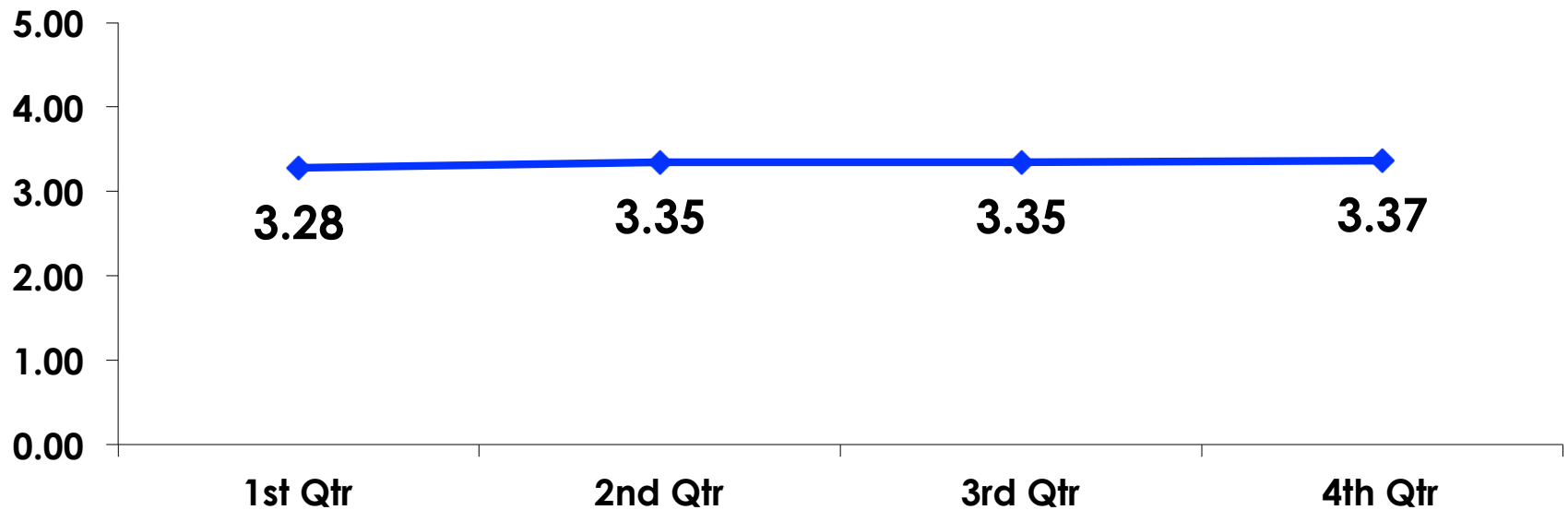
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

				GEN LEISURE GRP		INCENTIVE MKT		FEMALE 20- 40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME	
			TOTAL		CHILD		MALE 20-40						
			-	-	-	-	-	-	-	-	-	-	
Q3A	Yes	Count	130	33	15	1	57	55	71	10	2	55	
		Column N %	87%	83%	83%	100%	85%	87%	88%	83%	67%	80%	
	No	Count	20	7	3	0	10	8	10	2	1	14	
		Column N %	13%	18%	17%	0%	15%	13%	12%	17%	33%	20%	
	Total	Count	150	40	18	1	67	63	81	12	3	69	
		Column N %	87%	83%	83%	100%	85%	87%	88%	83%	67%	80%	
			Count	150	40	18	1	67	63	81	12	3	69
			Column N %	87%	83%	83%	100%	85%	87%	88%	83%	67%	80%

AVG LENGTH OF STAY - TRACKING



AVG 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	3.37	3.63	3.50	4.00	3.46	3.35	3.37	3.83	3.33	3.32
	Median	3	4	3	4	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	26	9	1	0	15	9	16	5	0	8
		Column N %	18%	23%	6%	0%	23%	15%	20%	42%	0%	12%
	Free-time package tour	Count	54	20	5	0	25	24	30	3	1	22
		Column N %	36%	50%	28%	0%	38%	39%	38%	25%	33%	32%
	Individually arranged travel (FIT)	Count	63	10	10	0	23	27	33	4	2	34
		Column N %	43%	25%	56%	0%	35%	44%	41%	33%	67%	50%
	Group tour	Count	5	1	2	1	3	2	1	0	0	4
		Column N %	3%	3%	11%	100%	5%	3%	1%	0%	0%	6%
	Total	Count	148	40	18	1	66	62	80	12	3	68

TRAVEL MOTIVATION - SEGMENTATION

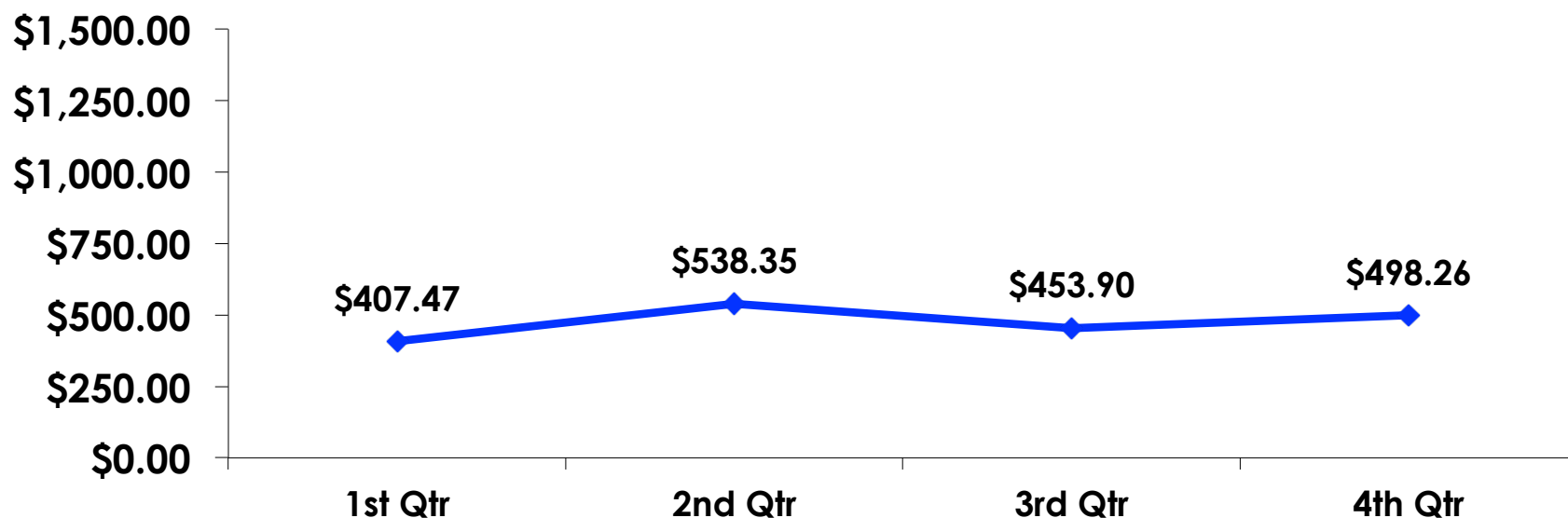
		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	1%	3%	0%	0%	0%	2%	1%	0%	0%	1%
	Price	8%	3%	11%	0%	9%	10%	9%	0%	0%	7%
	Visit friends/ Relatives	4%	3%	0%	0%	3%	5%	4%	0%	33%	1%
	Recomm- friend/family/trvl agnt	13%	20%	17%	100%	16%	14%	19%	33%	0%	16%
	Scuba	8%	5%	6%	0%	9%	6%	9%	8%	0%	7%
	Water sports	5%	13%	11%	0%	7%	3%	5%	17%	0%	4%
	Short travel time	2%	3%	0%	0%	4%	0%	2%	0%	0%	1%
	Golf	4%	0%	0%	0%	6%	2%	4%	0%	0%	6%
	Relax	20%	75%	17%	0%	19%	24%	23%	25%	0%	25%
	Company/ Business Trip	3%	0%	0%	0%	3%	2%	2%	0%	33%	3%
	Convention/ Trade/ Conference	1%	0%	0%	0%	1%	0%	1%	0%	0%	3%
	Safe	15%	13%	17%	0%	15%	14%	22%	0%	0%	12%
	Natural beauty	39%	38%	61%	100%	33%	44%	35%	67%	0%	41%
	Shopping	15%	23%	11%	100%	16%	14%	16%	8%	33%	12%
	Career Cert/ Testing	1%	0%	0%	0%	0%	2%	1%	0%	0%	0%
	Married/ Attn wedding	1%	0%	6%	0%	1%	2%	1%	17%	0%	3%
	Honeymoon	7%	8%	11%	0%	12%	5%	11%	92%	0%	10%
	Pleasure	7%	28%	6%	0%	6%	10%	7%	0%	0%	10%
	Organized sports	1%	0%	0%	0%	0%	2%	0%	0%	0%	0%
	No Visa requirement	11%	8%	17%	100%	12%	13%	12%	8%	0%	13%
	Total Count	150	40	18	1	67	63	81	12	3	69

INFORMATION SOURCES - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
Q1	Friend/ Relative	38%	48%	33%	100%	43%	35%	44%	58%	0%	45%
	Internet	35%	40%	28%	0%	27%	40%	35%	33%	67%	38%
	TV	25%	35%	28%	100%	25%	25%	25%	8%	0%	29%
	Travel Agent Brochure	15%	18%	22%	100%	13%	17%	20%	50%	0%	13%
	Travel Guidebook- Bookstore	11%	20%	22%	100%	10%	16%	15%	42%	0%	13%
	Magazine (Consumer)	9%	23%	11%	100%	10%	10%	5%	17%	0%	9%
	Consumer Trvl Show	7%	8%	11%	100%	6%	5%	7%	17%	33%	3%
	Travel Trade Show	7%	5%	17%	100%	7%	6%	6%	0%	0%	6%
	Prior Trip	6%	10%	17%	0%	9%	5%	5%	17%	0%	9%
	Co-Worker/ Company Trvl Dept	5%	5%	0%	0%	3%	6%	9%	0%	0%	7%
	Newspaper	5%	3%	17%	100%	4%	5%	4%	17%	33%	7%
	Radio	3%	0%	0%	0%	3%	3%	2%	0%	0%	1%
	GVB Office	1%	3%	6%	0%	3%	0%	2%	8%	0%	1%
	Other	1%	0%	0%	0%	0%	2%	0%	0%	0%	1%
	GVB Promo	1%	3%	0%	0%	1%	0%	1%	0%	0%	0%
	Total	Count	150	40	18	1	67	63	81	12	3	69

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$474.49

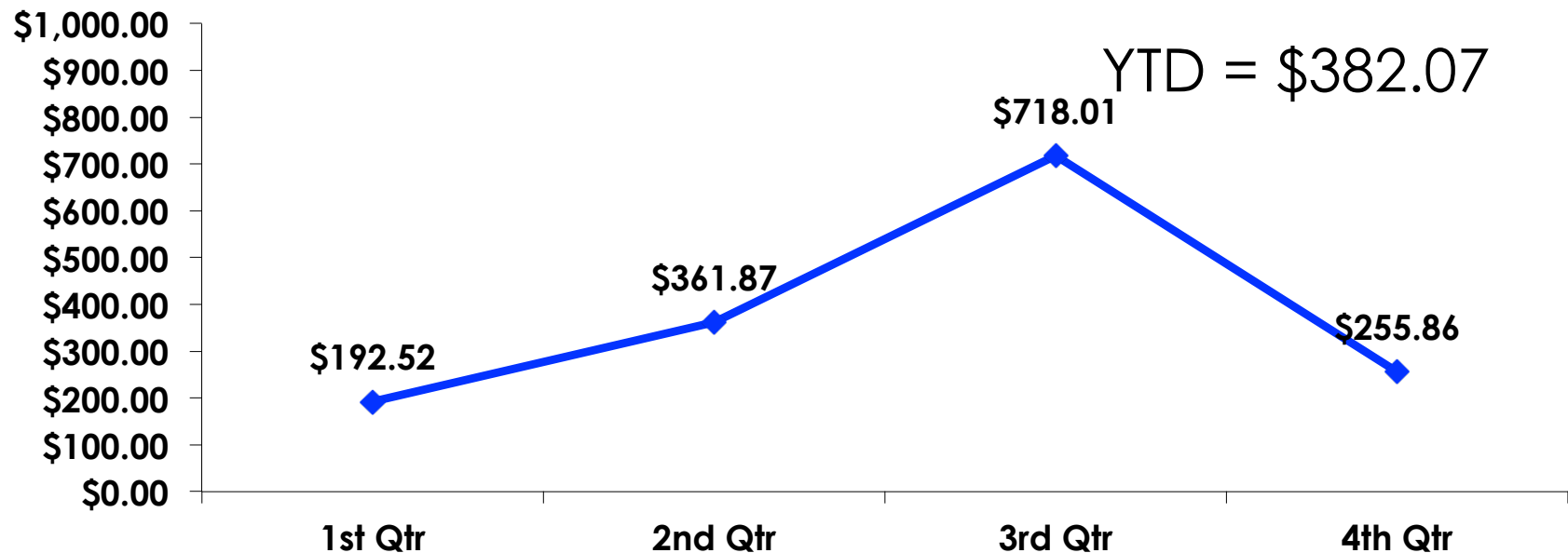
PREPAID EXPENDITURES

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	\$498.26	\$594.36	\$401.27	\$126.39	\$646.10	\$415.69	\$487.00	\$1,022.92	\$0.00	\$550.05
	Median	\$466	\$685	\$63	\$126	\$590	\$126	\$511	\$929	\$0	\$607
	Minimum	\$0	\$0	\$0	\$126	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,056	\$1,651	\$1,436	\$126	\$5,056	\$1,416	\$2,764	\$2,764	\$0	\$5,056

ON-ISLAND EXPENDITURES - TRACKING



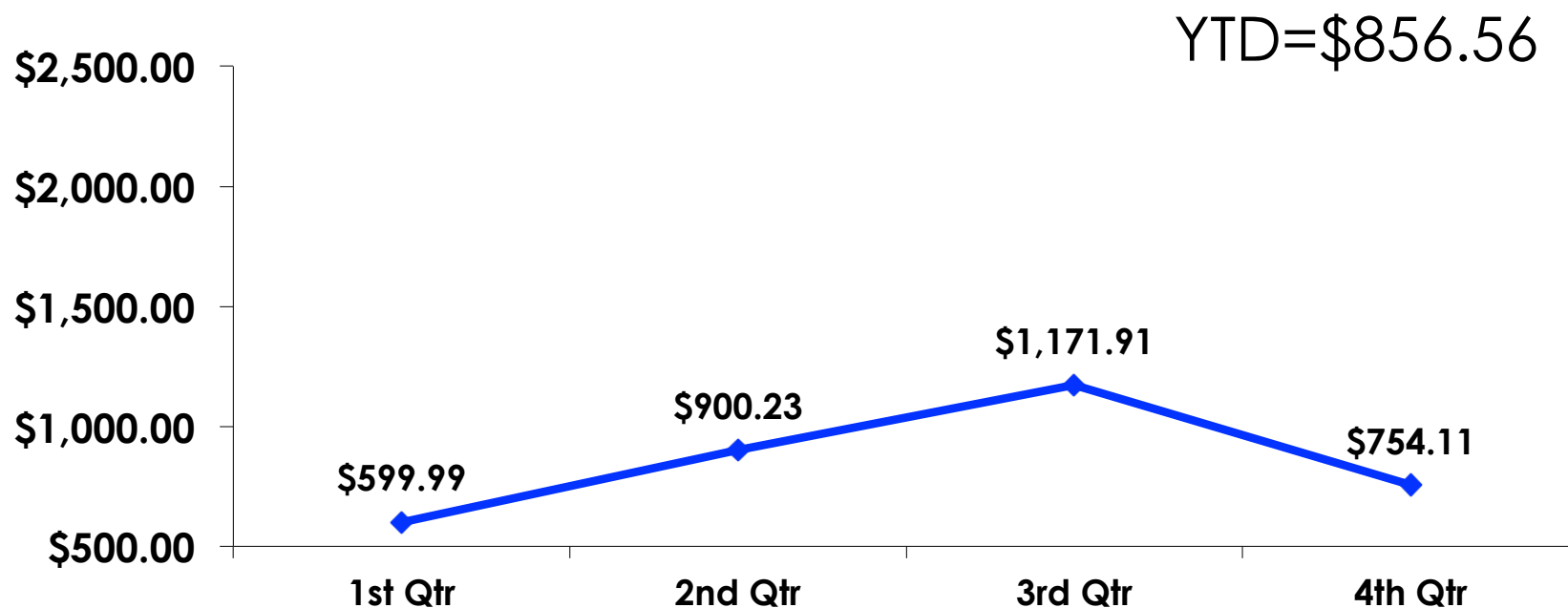
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$255.86	\$503.06	\$195.86	\$166.75	\$361.11	\$200.41	\$179.79	\$342.29	\$0.00	\$206.41
	Median	\$7	\$169	\$130	\$167	\$0	\$90	\$65	\$319	\$0	\$90
	Minimum	\$0	\$0	\$0	\$167	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$8,102	\$8,102	\$693	\$167	\$8,102	\$2,000	\$1,000	\$834	\$0	\$1,667

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	\$1,001.11	\$858.78	\$983.04	.	\$918.93	\$1,083.29	\$1,090.59	\$1,967.48	.	\$1,122.56
	Median	\$843	\$826	\$977	.	\$843	\$843	\$843	\$1,079	.	\$843
	Minimum	\$590	\$600	\$977	.	\$590	\$590	\$590	\$657	.	\$657
	Maximum	\$5,056	\$1,281	\$994	.	\$2,191	\$5,056	\$5,056	\$5,056	.	\$5,056
AIR/ HOTEL/ MEAL	Mean	\$1,751.32	\$1,448.31	\$1,223.46	.	\$2,101.89	\$1,206.61	\$1,493.98	\$1,657.12	.	\$2,015.28
	Median	\$1,382	\$1,264	\$1,223	.	\$1,517	\$1,196	\$1,264	\$1,148	.	\$1,264
	Minimum	\$964	\$1,021	\$1,099	.	\$964	\$1,011	\$964	\$1,011	.	\$1,099
	Maximum	\$10,111	\$2,427	\$1,348	.	\$10,111	\$1,517	\$2,831	\$2,831	.	\$10,111
AIR ONLY	Mean	\$1,567.64	.	\$1,399.39	.	\$1,736.77	\$724.64	\$1,428.72	\$2,123.36	.	\$1,778.40
	Median	\$1,820	.	\$1,350	.	\$1,737	\$725	\$1,585	\$2,123	.	\$1,820
	Minimum	\$725	.	\$725	.	\$1,350	\$725	\$725	\$2,123	.	\$1,350
	Maximum	\$2,123	.	\$2,123	.	\$2,123	\$725	\$1,820	\$2,123	.	\$2,123
HOTEL ONLY	Mean	\$505.56	.	\$505.56	\$505.56	.	\$505.56	.	.	.	\$505.56
	Median	\$506	.	\$506	\$506	.	\$506	.	.	.	\$506
	Minimum	\$506	.	\$506	\$506	.	\$506	.	.	.	\$506
	Maximum	\$506	.	\$506	\$506	.	\$506	.	.	.	\$506
HOTEL & MEAL	Mean	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.
	Minimum	.	.	.	.	.	.	.	.	.	.
	Maximum	.	.	.	.	.	.	.	.	.	.
F&B HOTEL	Mean	\$22.92	.	.	.	\$22.92	.	\$22.92	.	.	\$22.92
	Median	\$23	.	.	.	\$23	.	\$23	.	.	\$23
	Minimum	\$23	.	.	.	\$23	.	\$23	.	.	\$23
	Maximum	\$23	.	.	.	\$23	.	\$23	.	.	\$23
TRANS- TAIWAN	Mean	\$43.07	\$35.39	\$33.70	.	\$42.13	\$43.70	\$32.36	\$40.44	.	\$32.02
	Median	\$34	\$22	\$34	.	\$34	\$40	\$24	\$34	.	\$29
	Minimum	\$17	\$17	\$34	.	\$20	\$17	\$17	\$20	.	\$17
	Maximum	\$81	\$81	\$34	.	\$81	\$81	\$67	\$67	.	\$67
TRANS- GUAM	Mean	\$42.13	\$50.56	.	.	\$42.13	.	\$33.70	.	.	\$42.13
	Median	\$42	\$51	.	.	\$42	.	\$34	.	.	\$42
	Minimum	\$34	\$51	.	.	\$34	.	\$34	.	.	\$34
	Maximum	\$51	\$51	.	.	\$51	.	\$34	.	.	\$51
OPT TOURS	Mean	\$172.09	\$183.75	.	.	\$254.13	\$112.57	\$176.95	\$75.83	.	\$173.24
	Median	\$115	\$142	.	.	\$216	\$51	\$135	\$76	.	\$142
	Minimum	\$34	\$40	.	.	\$96	\$34	\$51	\$51	.	\$34
	Maximum	\$489	\$337	.	.	\$489	\$337	\$337	\$101	.	\$337
OTHER	Mean	\$552.27	\$522.69	\$739.24	.	\$420.85	\$565.29	\$493.70	\$521.07	.	\$471.68
	Median	\$362	\$350	\$431	.	\$337	\$362	\$362	\$388	.	\$362
	Minimum	\$44	\$44	\$337	.	\$94	\$44	\$44	\$337	.	\$44
	Maximum	\$1,685	\$1,618	\$1,449	.	\$1,112	\$1,685	\$1,449	\$1,112	.	\$1,618
TOTAL	Mean	\$738.91	\$820.20	\$686.18	\$505.56	\$956.88	\$555.38	\$712.23	\$1,522.02	\$0.00	\$858.90
	Median	\$590	\$826	\$253	\$506	\$696	\$506	\$708	\$1,239	\$0	\$775
	Minimum	\$0	\$0	\$0	\$506	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$10,111	\$2,696	\$2,588	\$506	\$10,111	\$2,174	\$3,168	\$3,168	\$0	\$10,111

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 ($p \leq .05$) 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, 3rd and 4th Qtr 2013 and Overall 1st Qtr 2012 to 4th Qtr 2013

Drivers:	1st Qtr 2012	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	Combined 1st Qtr 2012 to 4th Qtr 2013
Quality & Cleanliness of beaches & parks	2				3
Ease of getting around					
Safety walking around at night		3			4
Quality of daytime tours		1			
Variety of daytime tours					
Quality of nighttime tours		4	2		
Variety of nighttime tours					5
Quality of shopping					
Variety of shopping					
Price of things on Guam	1		1	1	2
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%	10.5%	21.5%
NOTE: Only significant drivers are included.					

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by one significant factor in the Fourth Quarter 2013 Period. It is:
 - **Price of things on Guam.**
- With this factor, the overall r^2 is .105 meaning that **10.5% of overall satisfaction is accounted for by this factor.**

Comparison of Drivers of Per Person On-Island Expenditures, 1st Qtr 2012, 2nd, 3rd and 4th Qtr 2013 and Overall 1st Qtr 2012 to 4th Qtr 2013

	1st Qtr 2012	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	Combine d 1st Qtr 2012 to 4th Qtr 2013
Drivers:					
Quality & Cleanliness of beaches & parks					
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		1	
Variety of shopping					
Price of things on Guam	2			2	
Quality of hotel accommodations		2		3	
Quality/cleanliness of air, sky					1
Quality/cleanliness of parks				5	
Quality of landscape in Tumon		4		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%	36.7%	2.2%
NOTE: Only significant drivers are included.					

Drivers of Per Person On Island Expenditure

- **Per person on island expenditure** of Taiwan visitors to Guam is driven by five significant factors in the Fourth Quarter 2013 Period. By rank order they are:
 - **Quality of shopping,**
 - **Price of things on Guam,**
 - **Quality of hotel accommodations,**
 - **Quality of landscape in Tumon, and**
 - **Quality/cleanliness of parks.**
- With these factors, the overall r^2 is .367 meaning that **36.7% of per person on island expenditure is accounted for by these factors.**