



# **GUAM VISITORS BUREAU**

## **Taiwan Visitor Tracker Exit Profile**

### **FY2013**

#### **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 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.

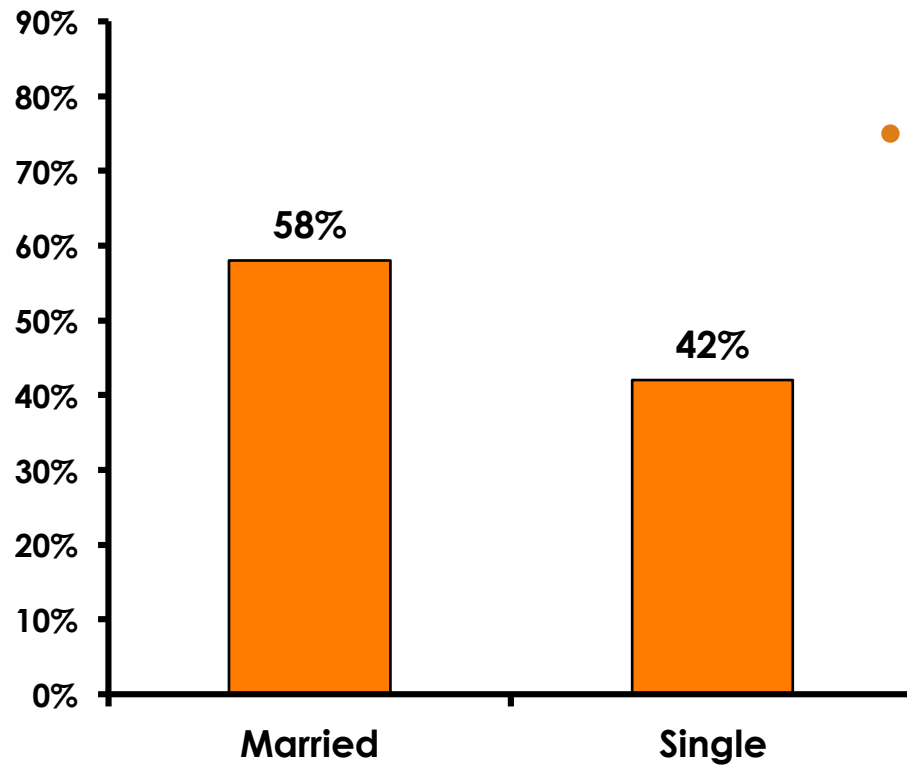
# OBJECTIVES

- 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

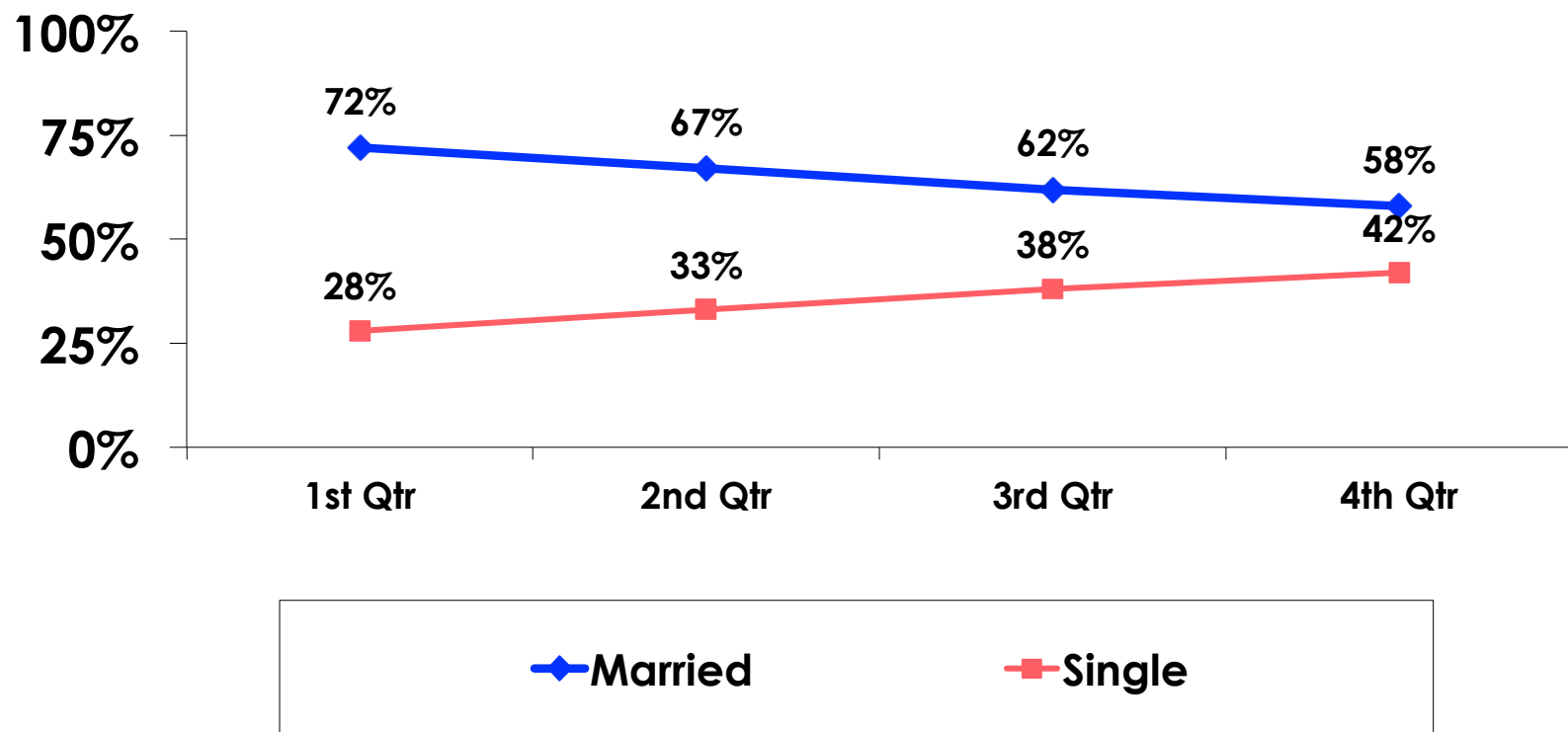
## **PROFILE OF RESPONDENTS**

# Marital Status - Overall

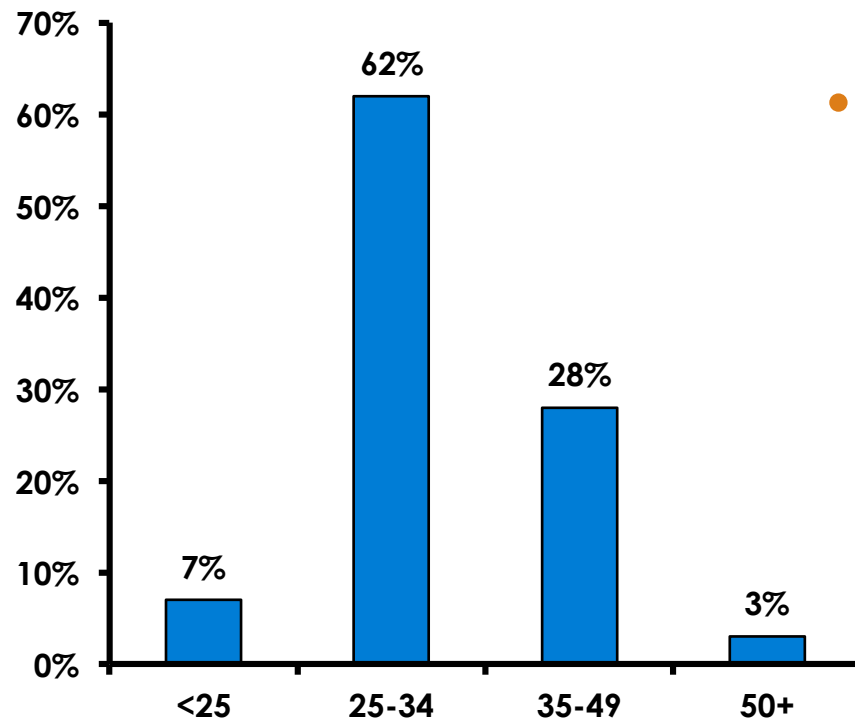


- Majority of Taiwanese visitors are married.

# MARITAL STATUS

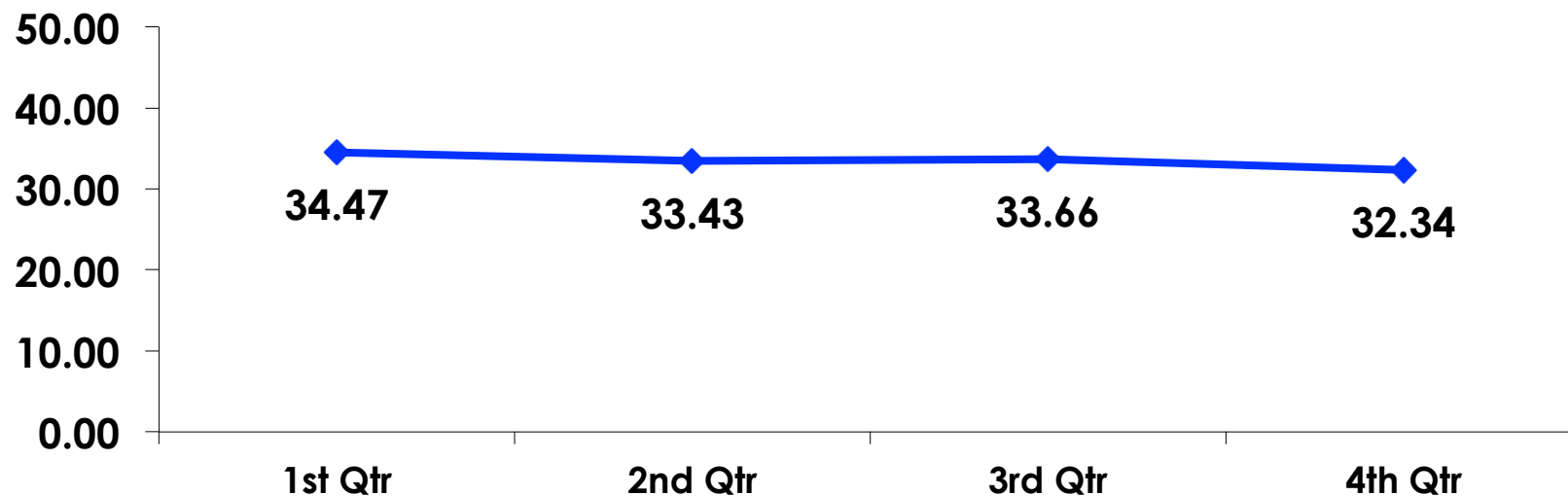


# Age - Overall



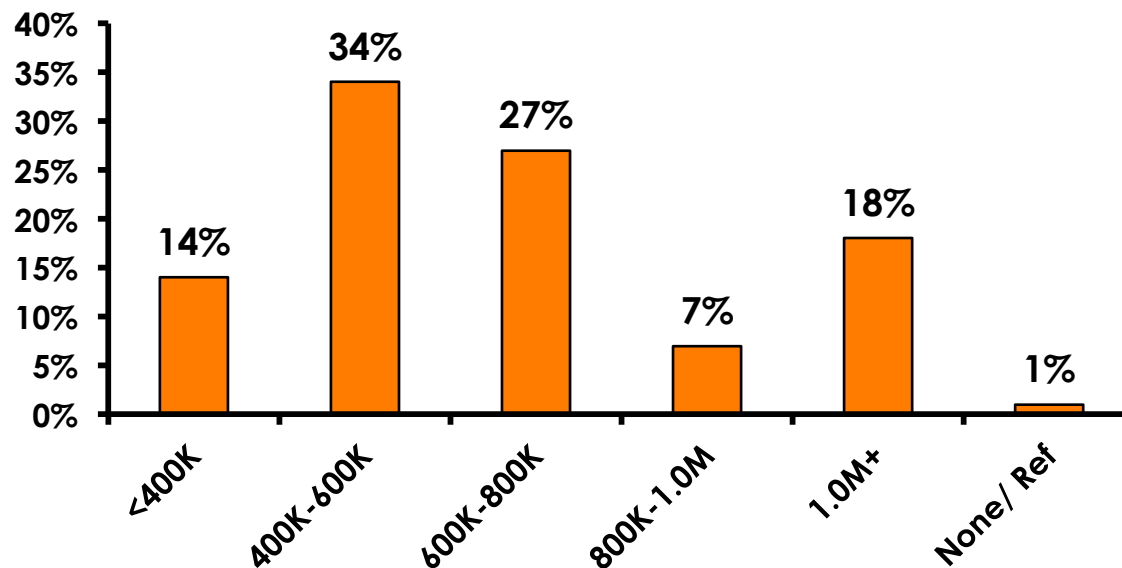
- The average age of the respondents is 32.34 years of age.

# AVERAGE - AGE



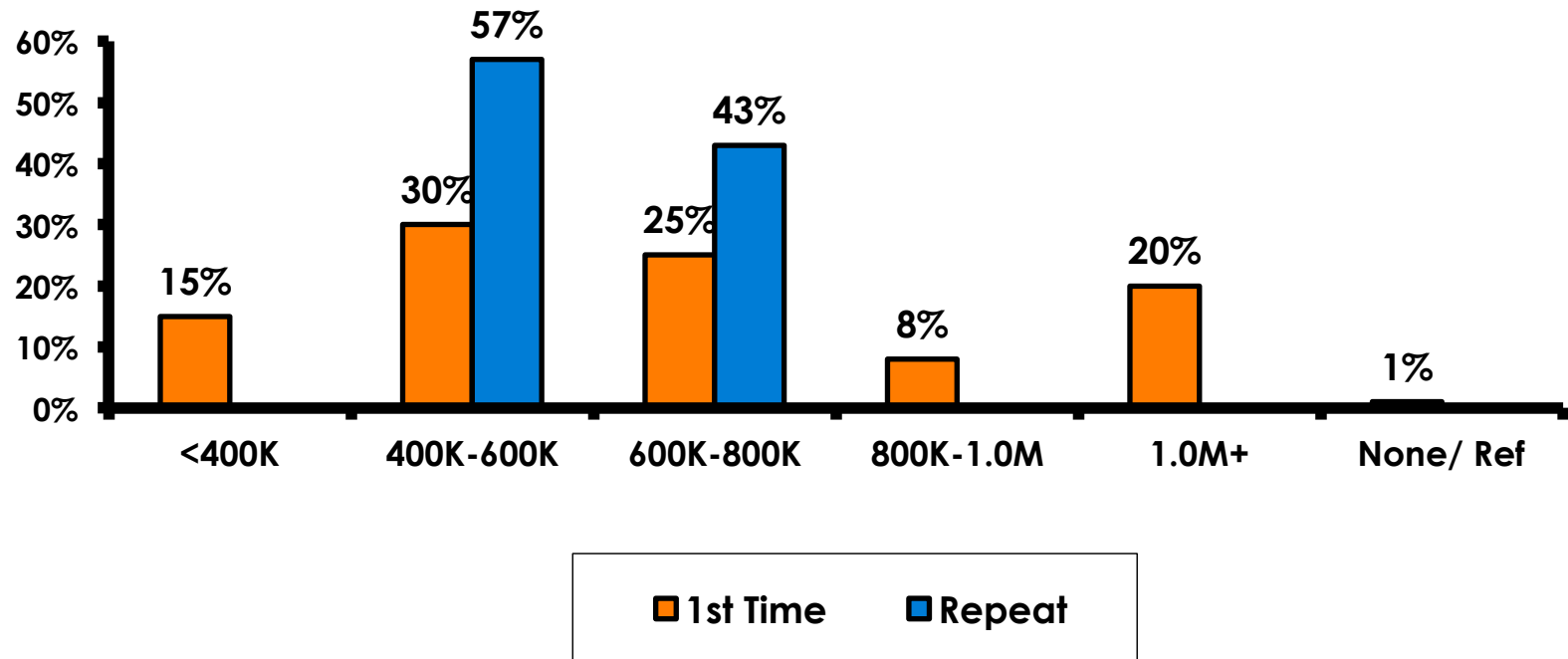


# Personal Income



- TWD29.67=\$1

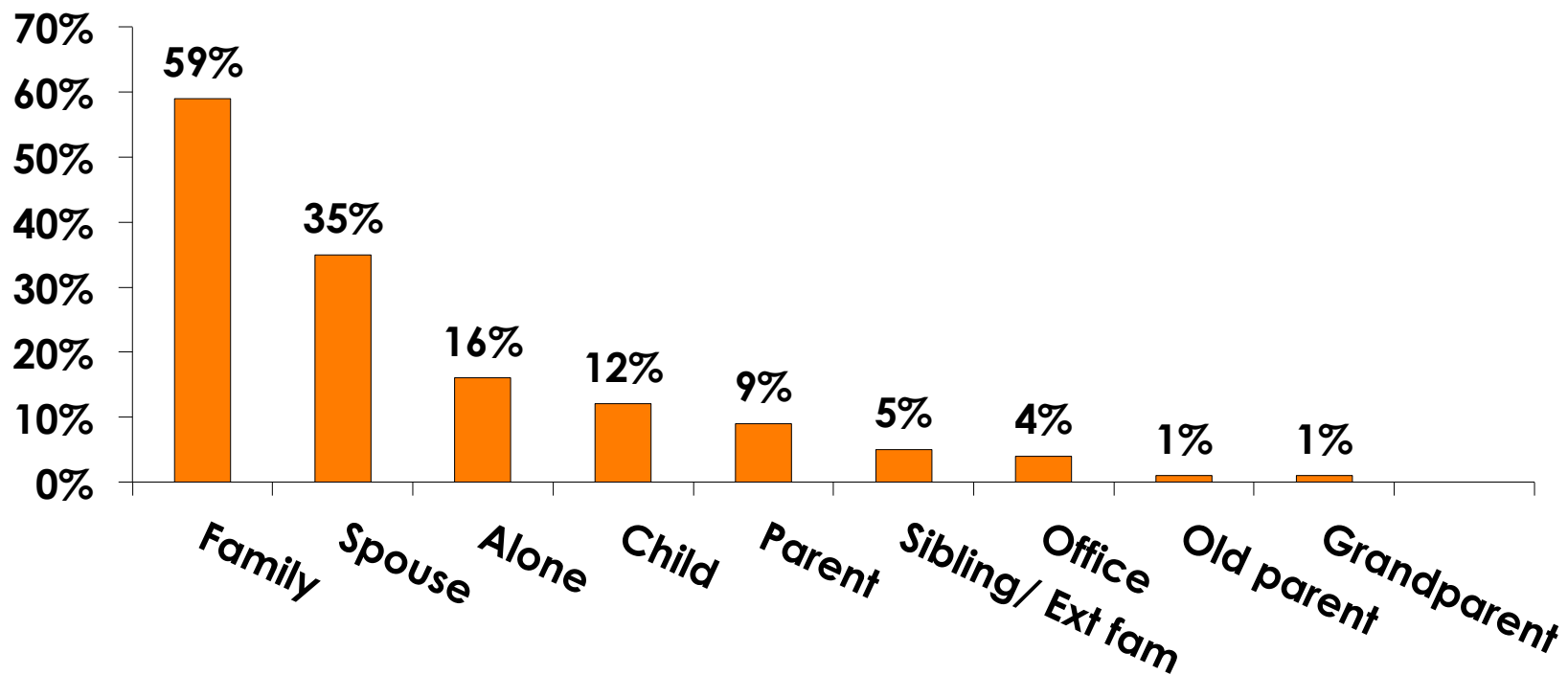
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<=NT160K	Count	3	1	2		3		
		Column N %	3%	2%	4%		4%		
	NT160K-NT200K	Count	2		2		2		
		Column N %	2%		4%		3%		
	NT200K-NT400K	Count	10	7	3		9	1	
		Column N %	9%	12%	6%		13%	3%	
	NT400K-NT600K	Count	38	13	25	2	32	3	1
		Column N %	34%	22%	47%	40%	46%	9%	20%
	NT600K-NT800K	Count	31	20	11	2	9	17	3
		Column N %	27%	33%	21%	40%	13%	50%	60%
	NT800K-NT1.0M	Count	8	4	4		5	2	1
		Column N %	7%	7%	8%		7%	6%	20%
	NT1.0M+	Count	20	14	6	1	8	11	
		Column N %	18%	23%	11%	20%	12%	32%	
	No Income	Count	1	1			1		
		Column N %	1%	2%			1%		
	Total	Count	113	60	53	5	69	34	5

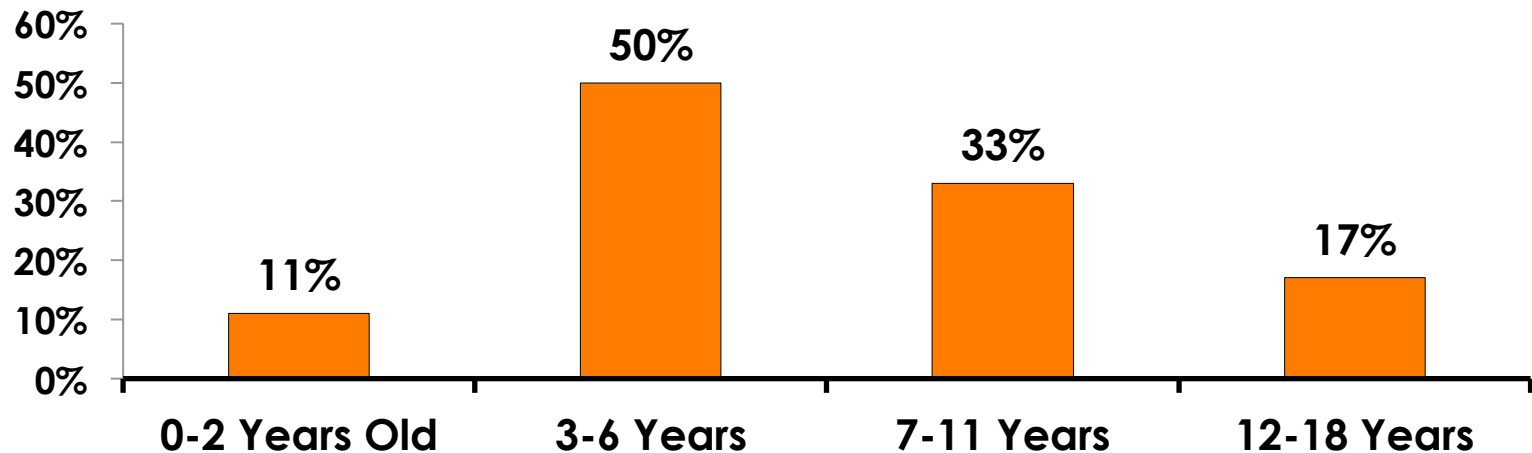
# Travel Companions



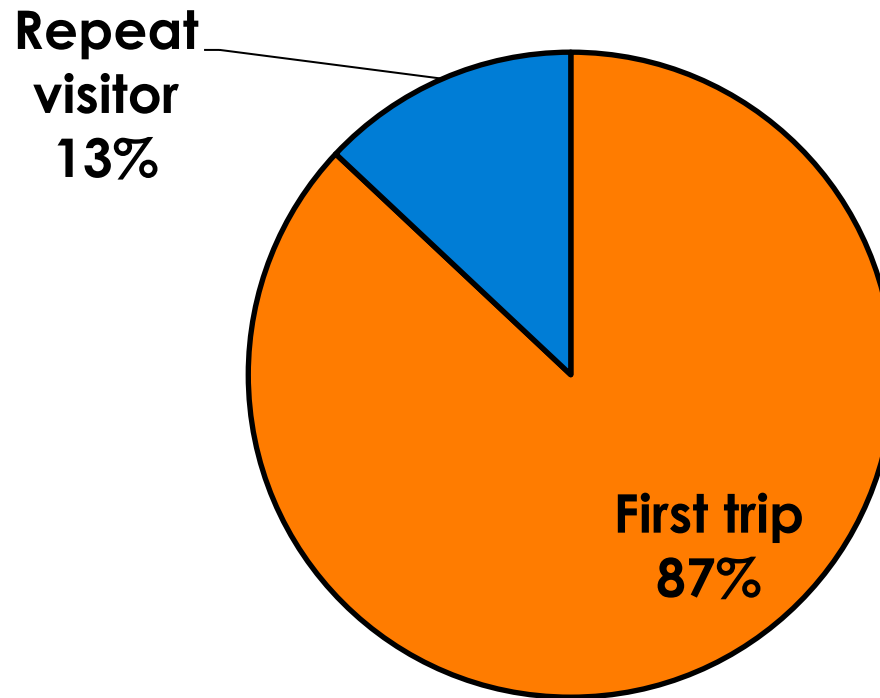
# Number of Children Travel Party

N=18 total respondents traveling with children.

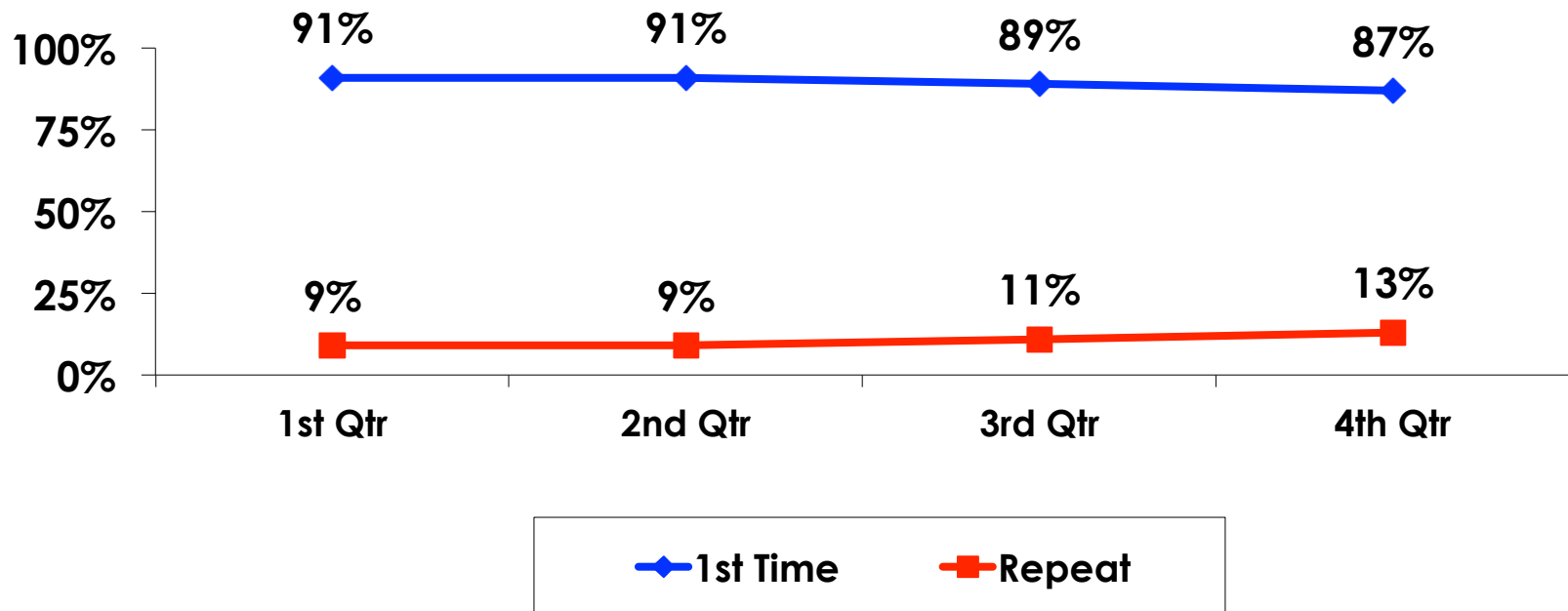
(Of those N=18 respondents, there is a total of 20 children 18 years or younger)



# Prior Trips to Guam



# PRIOR TRIPS TO GUAM



# Trips to Guam by Age & Gender

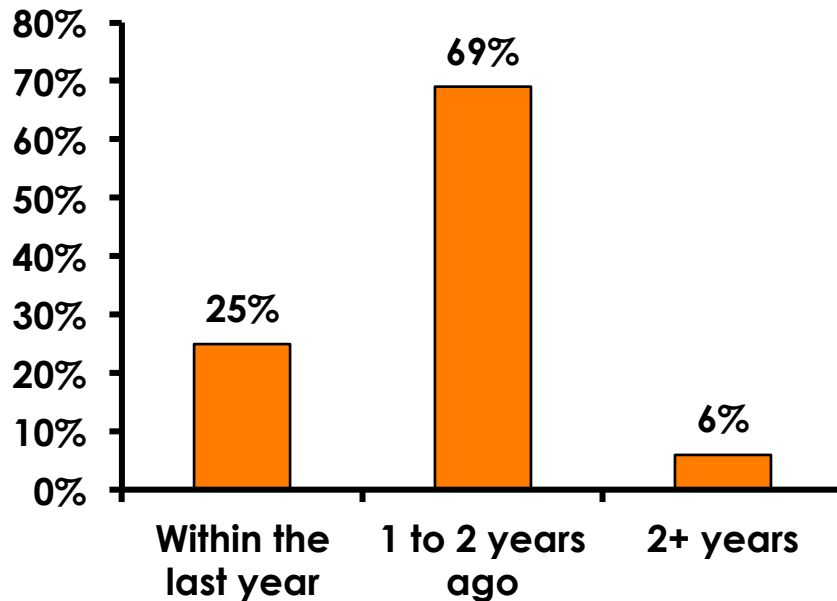
			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	80	68	12
		Column N %	53%	52%	60%
	Female	Count	70	62	8
		Column N %	47%	48%	40%
AGE	Total	Count	150	130	20
	18-24	Count	11	10	1
		Column N %	7%	8%	5%
	25-34	Count	92	78	14
		Column N %	62%	60%	70%
	35-49	Count	41	36	5
		Column N %	28%	28%	25%
	50+	Count	5	5	
		Column N %	3%	4%	
	Total	Count	149	129	20

- Majority are first-time visitors to Guam.



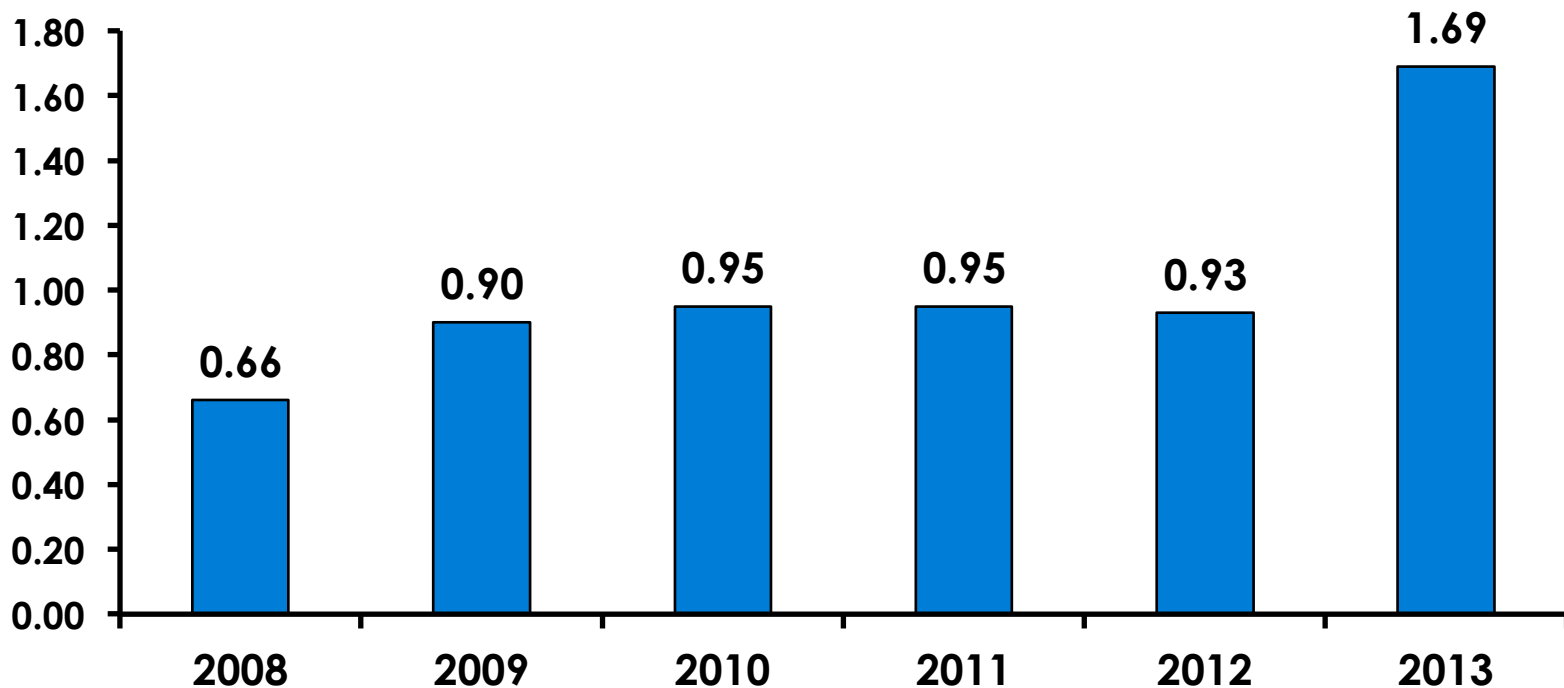
# Repeat Visitors Last Trip

n = 16



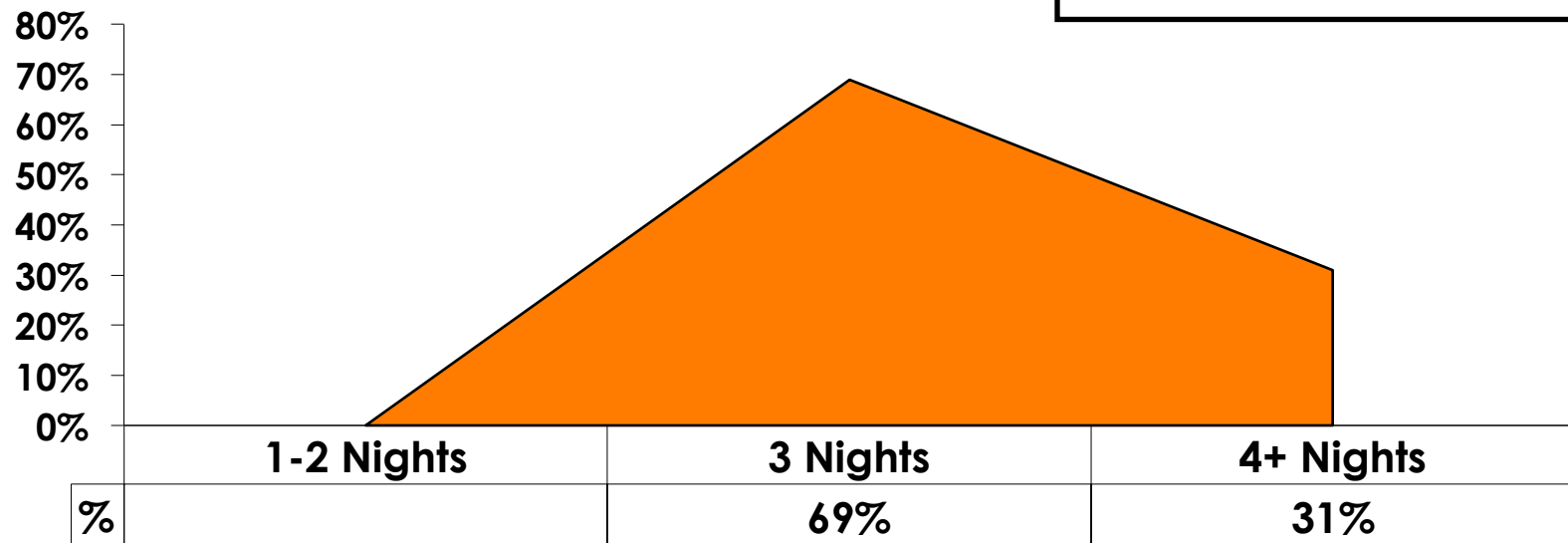
- The average repeat visitor has been to Guam 1.06 times.

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

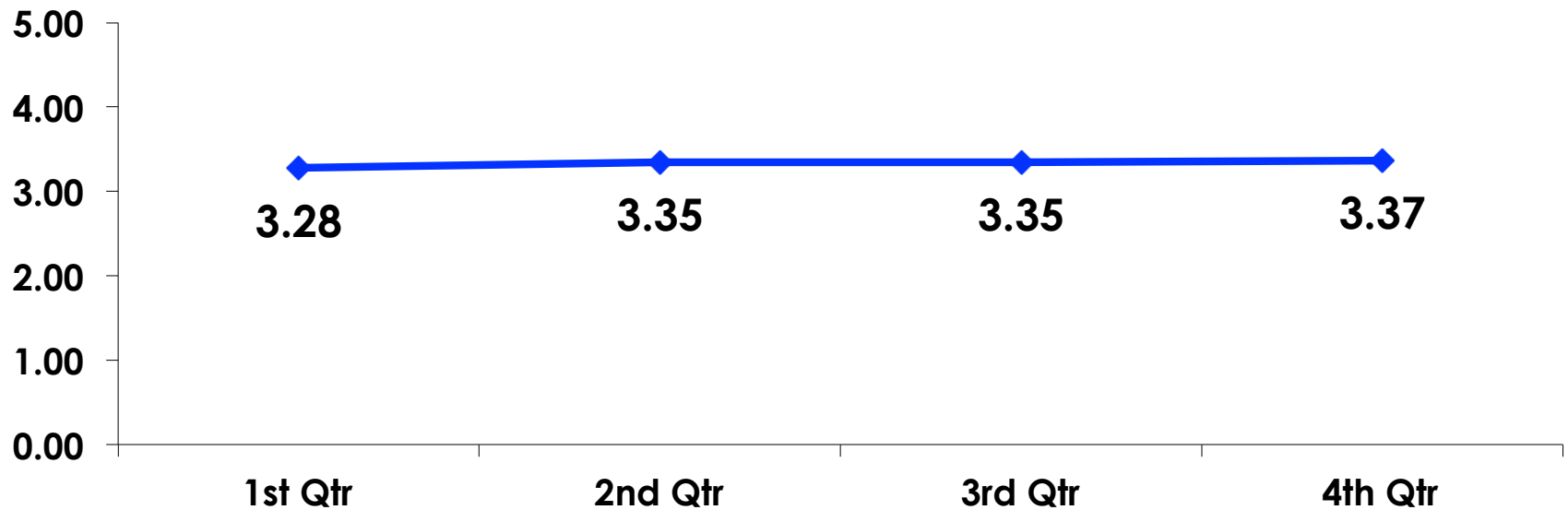


# Length of Stay

Mean = 3.37 Days  
Median = 3.0 Days



# AVG LENGTH OF STAY

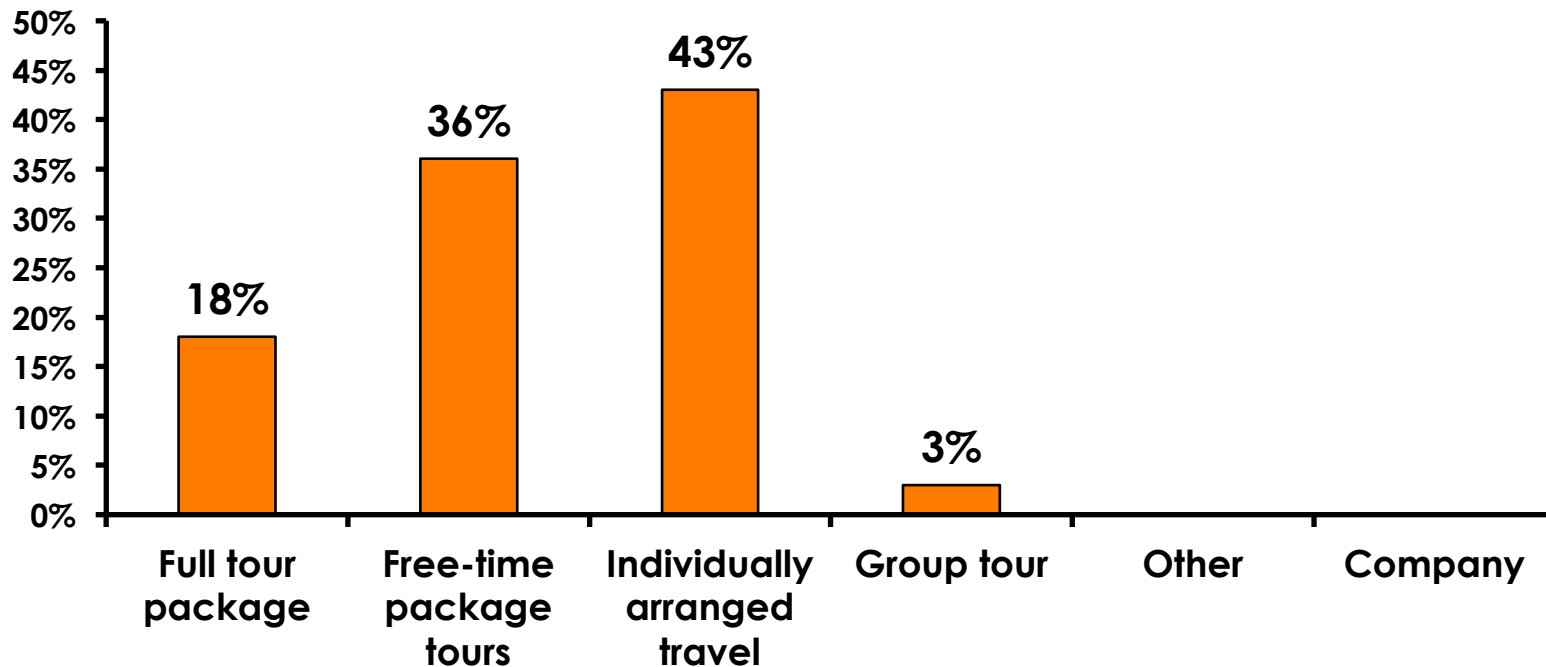


# Occupation by Income

		TOTAL	Q26						
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+ No Income
Q25	Company: Office non-mgr	51%	33%	100%	56%	63%	57%	63%	5%
	Company: Salesperson	13%			11%	13%	10%	25%	20%
	Skilled worker	9%			11%	3%	13%	13%	15%
	Prof-specialist	8%	33%			13%	7%		5%
	Freelancer	5%	33%			3%	7%		10%
	Govt- Mgr/ Exec	4%							25%
	Other	3%			11%	5%	3%		
	Student	3%							
	Govt- Office non-mgr	3%			11%				10%
	Govt- Executive	3%					3%		10%
	Total Count	120	3	2	9	38	30	8	20 1

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



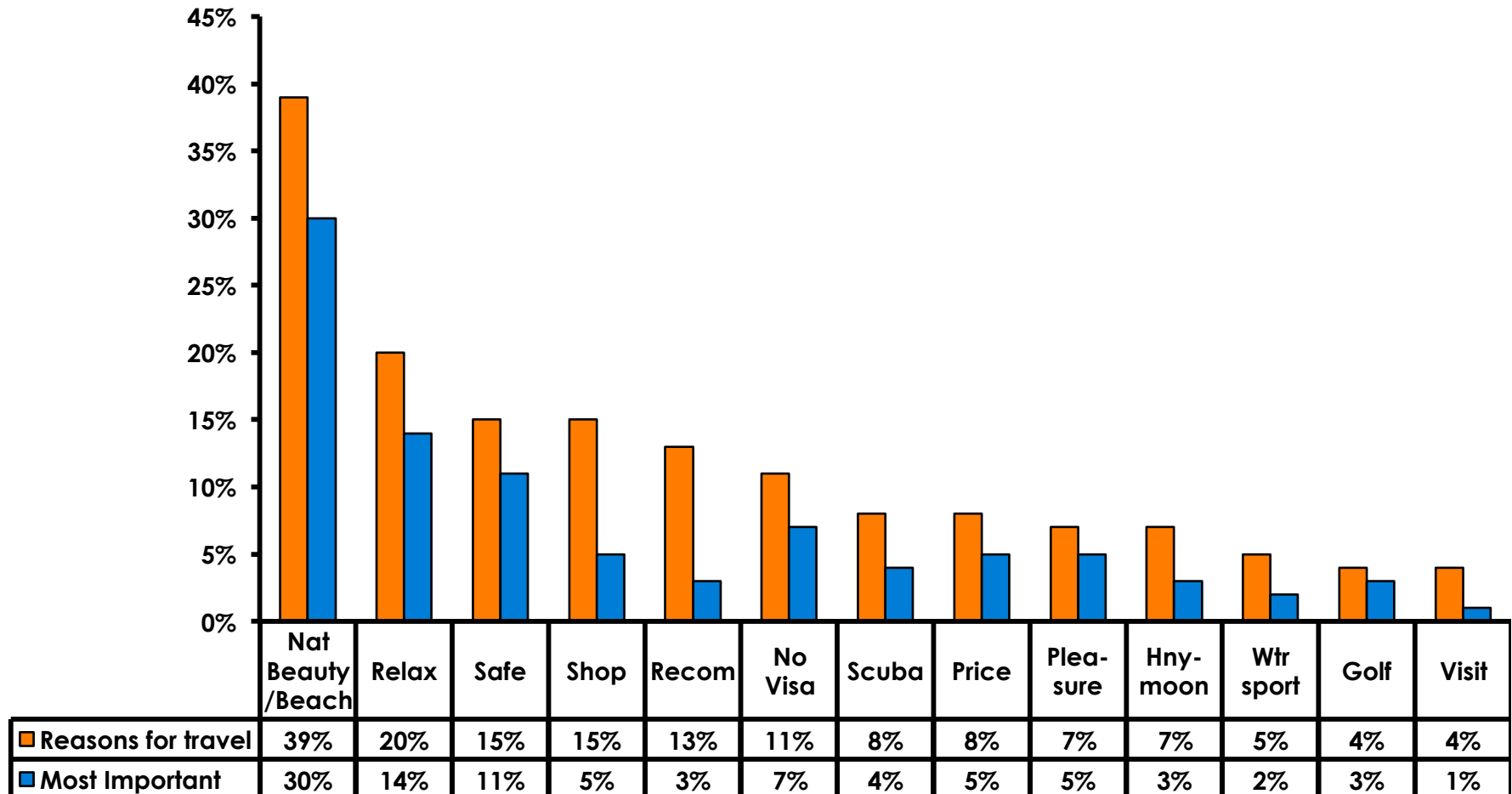
# Accommodation by Income

Average length of stay: 3.37 days

		TOTAL	Q26						
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+ No Income
Q9	Westin Resort Guam	19%	33%	100%	20%	8%	29%		40%
	Royal Orchid Guam	13%			30%	16%	16%		
	Hilton Guam Resort	13%			10%	24%	3%	13%	10%
	Hotel Nikko Guam	11%	33%		10%	8%	16%	13%	
	Fiesta Resort Guam	9%	33%		10%	18%	13%		
	Hyatt Regency Guam	7%			10%	8%	3%	25%	15%
	PIC Club	7%				3%	6%	13%	5%
	Holiday Resort Guam	6%			10%	8%	3%		5%
	Sheraton Laguna Guam	5%				3%	6%	13%	5%
	Outrigger Guam Resort	5%				3%		13%	20%
	Bayview Hotel	1%				3%			
	Hotel Santa Fe	1%							
	Oceanview Hotel	1%							
	Guam Aurora Resort	1%						13%	
	Guam Marriott Resort	1%					3%		
	Total Count	150	3	2	10	38	31	8	20
									1



# 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	39%	36%	40%	37%	60%	36%	43%
	Relax	20%	27%	18%	22%	20%	18%	23%
	Safe	15%	18%	12%	22%	20%	14%	17%
	Shopping	15%	27%	14%	15%		16%	13%
	Recomm- friend/family/trvl agnt	13%	9%	14%	15%		14%	13%
	No Visa requirement	11%	27%	11%	10%		11%	11%
	Scuba	8%		10%	5%		9%	7%
	Price	8%	18%	9%	5%		8%	9%
	Pleasure	7%	9%	10%		20%	5%	10%
	Honeymoon	7%	9%	10%	2%		10%	4%
	Water sports	5%	9%	5%	2%		6%	3%
	Golf	4%		5%	2%		6%	1%
	Visit friends/ Relatives	4%	9%	4%	2%		4%	4%
	Company/ Business Trip	3%	9%	2%	2%		4%	1%
	Short travel time	2%	9%	2%			4%	
	Married/ Attn wedding	1%		1%	2%		1%	1%
	Convention/ Trade/ Conference	1%		1%	2%		3%	
	Organized sports	1%		1%				1%
	Career Cert/ Testing	1%		1%				1%
	Previous trip	1%			2%			1%
Total	Count	150	11	92	41	5	80	70

# Motivation by Income

		TOTAL	Q26								
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income	
Q5A	Natural beauty	39%	33%	100%	50%	37%	45%	38%	35%	100%	
	Relax	20%	33%		10%	18%	32%	25%	25%		
	Safe	15%			10%	13%	10%	13%	45%		
	Shopping	15%		50%	10%	11%	13%		30%		
	Recomm- friend/family/trvl agnt	13%		100%	20%	13%	19%		20%		
	No Visa requirement	11%			10%	13%	13%		5%		
	Scuba	8%	33%		10%	8%	6%	13%			
	Price	8%			10%	8%	6%	25%	5%		
	Pleasure	7%	33%	50%		16%	3%		5%		
	Honeymoon	7%	33%	50%	10%	5%	16%		5%		
	Water sports	5%	67%			3%	6%	13%	5%		
	Golf	4%				8%	3%				
	Visit friends/ Relatives	4%		50%		3%		25%			
	Company/ Business Trip	3%			10%		6%				
	Short travel time	2%			10%		3%	13%			
	Married/ Attn wedding	1%				3%	3%				
	Convention/ Trade/ Conference	1%				3%	3%				
	Organized sports	1%									
	Career Cert/ Testing	1%			10%						
	Previous trip	1%					3%				
	Total	Count	150	3	2	10	38	31	8	20	1

# SECTION 3 **EXPENDITURES**

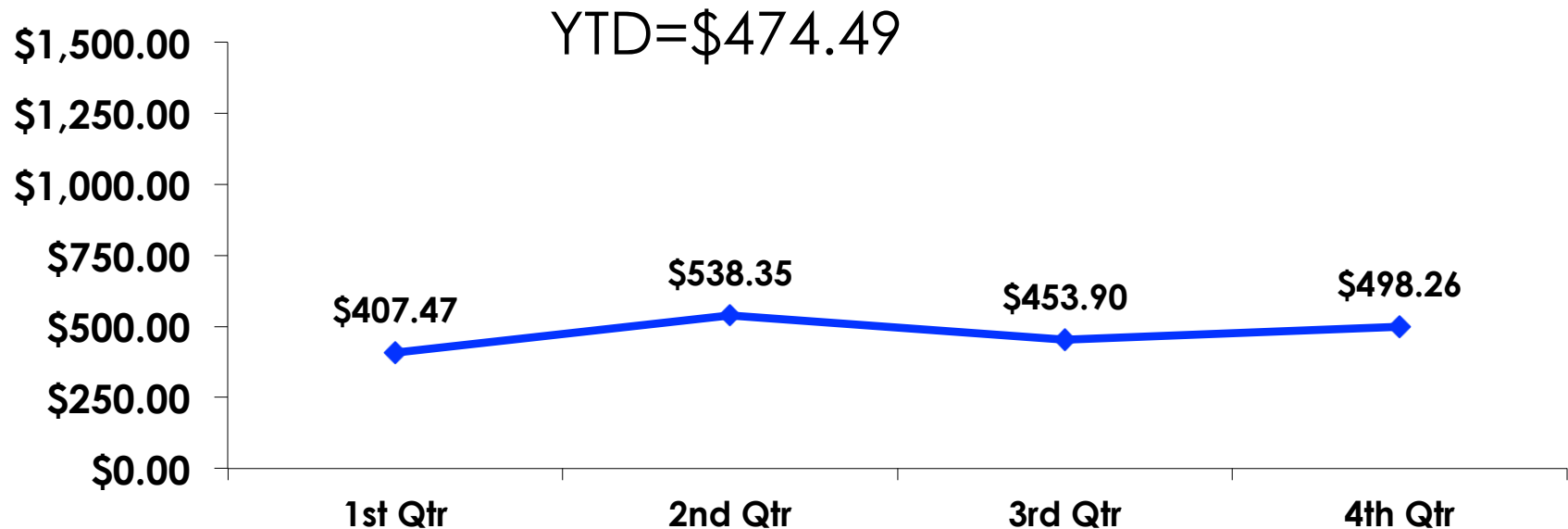
# Prepaid Expenditures

## TWD 29.91/US\$1

- \$738.91 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$10,111 = maximum (highest amount recorded for the entire sample)
- \$498.26 = overall mean average per person prepaid expenditures

# PREPAID EXPENDITURES

## Per Person



# Breakdown of Prepaid Expenditures

## TWD29.67=\$1

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

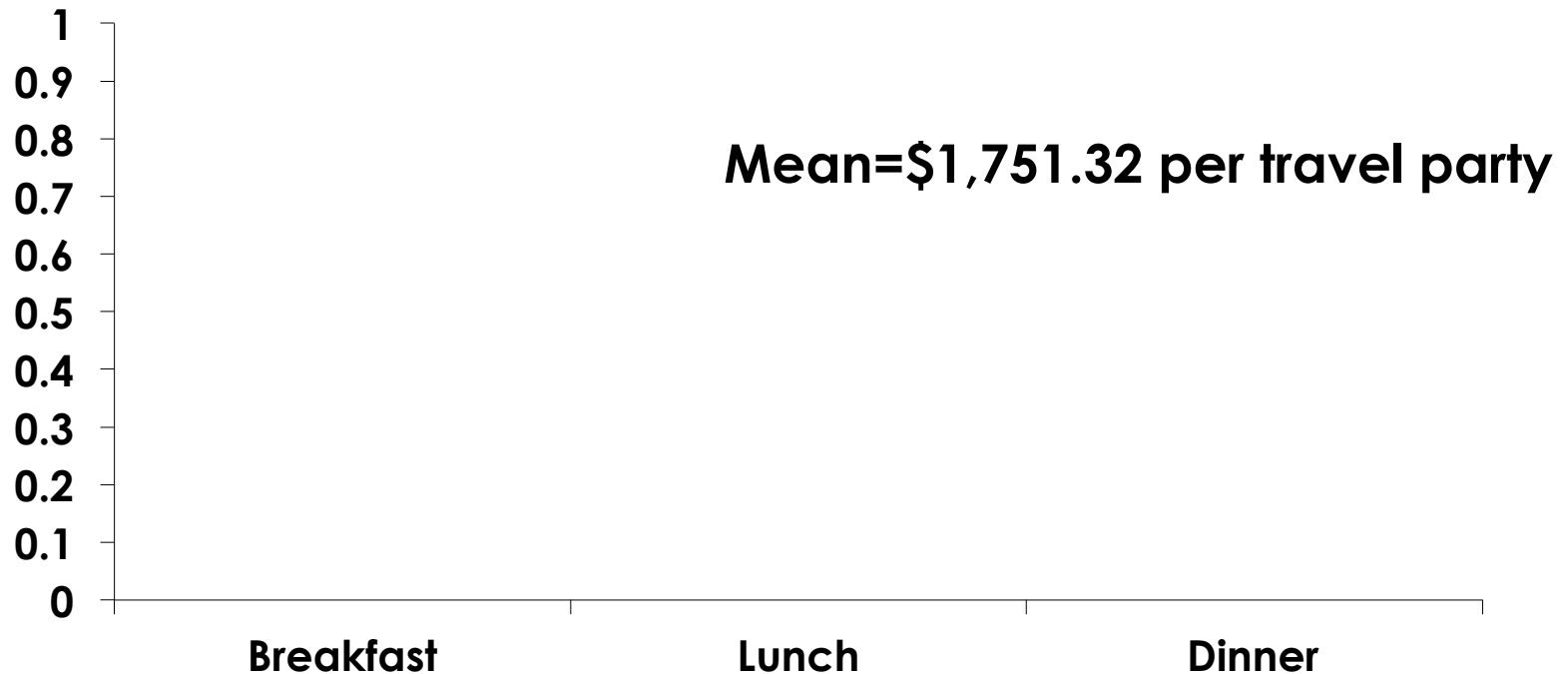
	MEAN \$
Air & Accommodation package only	\$1,001.11
Air & Accommodation w/ daily meal package	\$1,751.32
Air only	\$1,567.64
Accommodation only	\$505.56
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$22.92
Ground transportation – Taiwan	\$43.07
Ground transportation – Guam	\$42.13
Optional tours/ activities	\$172.09
Other expenses	\$552.27
<b>Total Prepaid</b>	<b>\$738.91</b>



# PREPAID MEAL BREAKDOWN

**Air/ Accommodations with Daily Meal Pkg.**

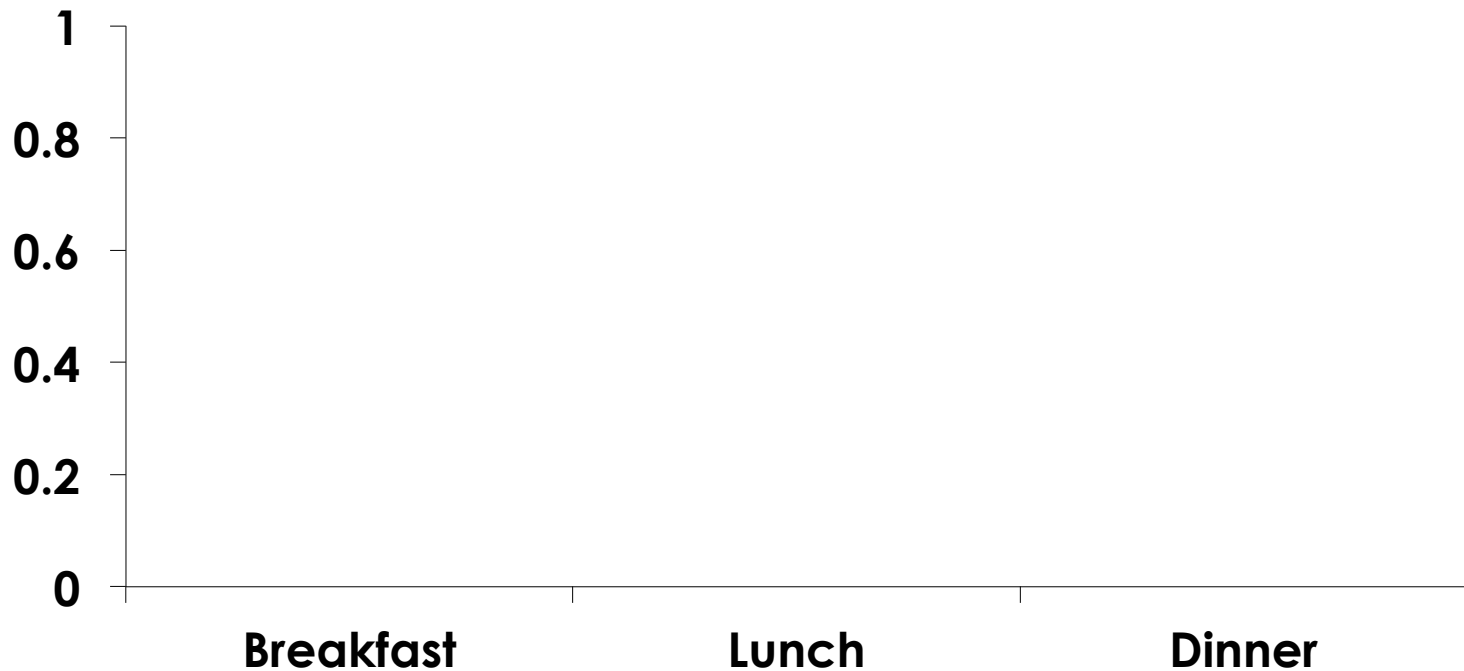
**n= No responses**



# PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

**n=x**



Mean=\$xxx per travel party

# PREPAID GROUND TRANSPORTATION

n= No responses



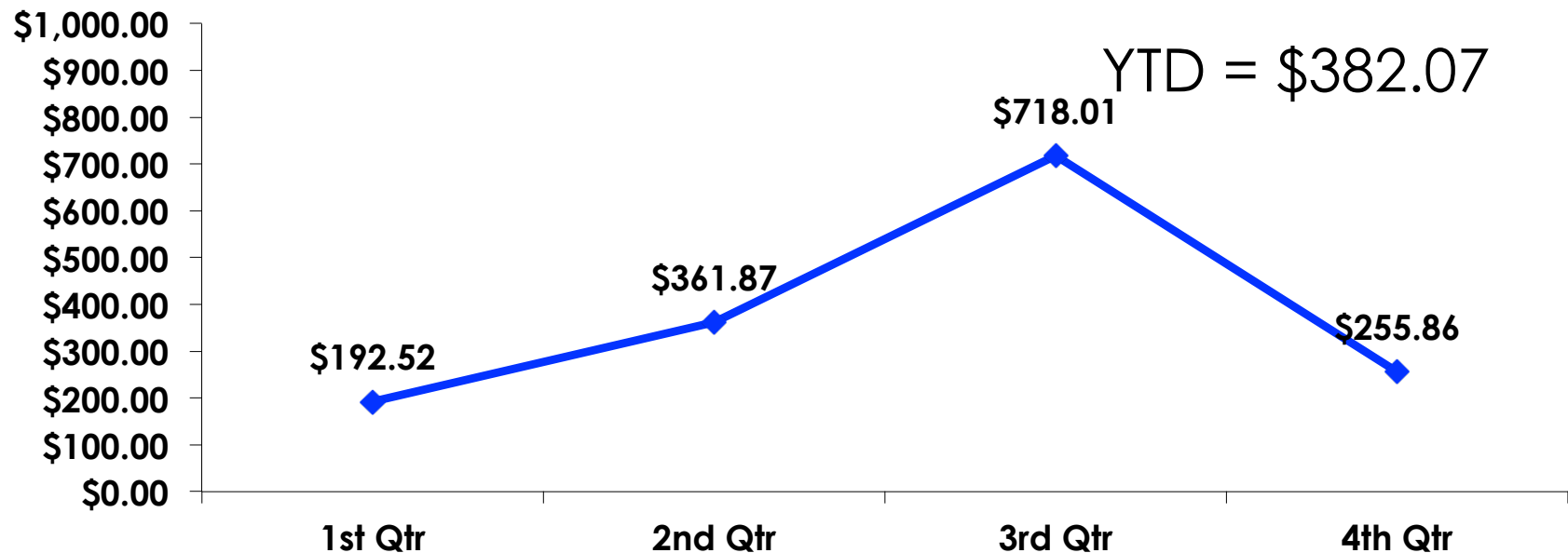
Mean=\$42.13 per travel party

# On-Island Expenditures

- \$369.43 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,000 = Maximum (highest amount recorded for the entire sample)
- \$255.86 = overall mean average per person on-island expenditure

# ON-ISLAND EXPENDITURES

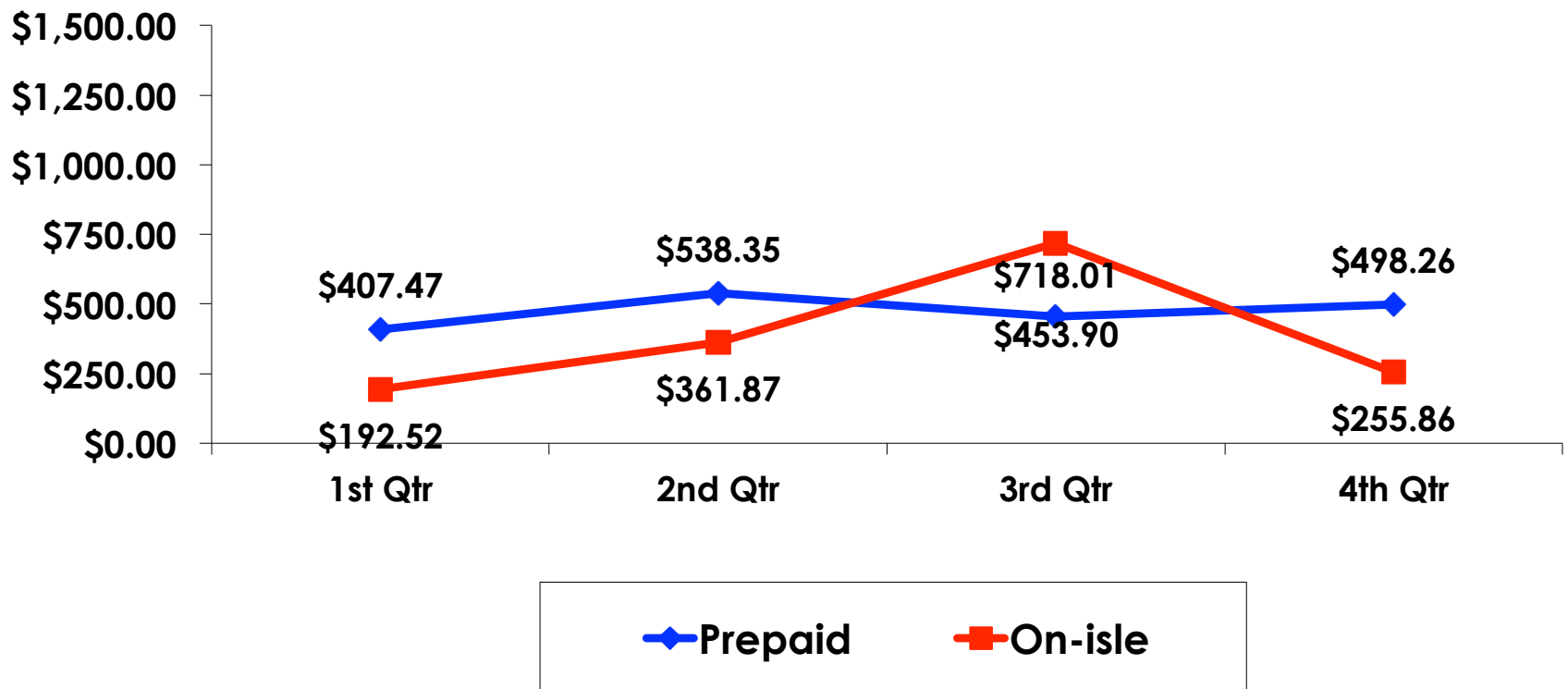
## Per Person



# PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$474.49

On-Isle YTD = \$382.07



# 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	\$255.86	\$317.74	\$185.13	\$196.17	\$397.35	\$227.91	\$81.25	\$332.00	\$156.04	\$237.64	\$0.00
	Median	\$7	\$0	\$71	\$0	\$0	\$90	\$0	\$300	\$62	\$44	\$0
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$8,102	\$8,102	\$2,000	\$710	\$8,102	\$1,667	\$325	\$680	\$693	\$2,000	\$0

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$9.95	\$12.00	\$7.60	\$15.18	\$13.47	\$2.10	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$9.87	\$14.62	\$4.44	\$16.09	\$9.25	\$11.05	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$12.35	\$17.33	\$6.66	\$29.91	\$13.26	\$3.73	\$30.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$19.87	\$22.61	\$16.74	\$14.55	\$23.28	\$16.56	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$101.76	\$136.96	\$61.53	\$128.45	\$120.89	\$54.37	\$100.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- OTHER	Mean	\$81.37	\$141.50	\$12.64	\$36.36	\$126.14	\$4.88	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TRANS	Mean	\$7.45	\$9.05	\$5.61	\$22.18	\$9.13	\$0.80	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$127.99	\$100.89	\$158.96	\$37.64	\$73.00	\$294.34	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$369.43	\$452.77	\$274.19	\$300.36	\$386.52	\$387.83	\$130.00
	Median	\$7	\$0	\$109	\$300	\$7	\$175	\$0



# On-Island Expenditures

## First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$9.95	\$11.00	\$3.10
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$9.87	\$9.61	\$11.55
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$12.35	\$14.09	\$1.00
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$19.87	\$20.78	\$14.00
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$101.76	\$102.03	\$100.00
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$81.37	\$91.58	\$15.00
	Median	\$0	\$0	\$0
TRANS	Mean	\$7.45	\$8.59	\$0.00
	Median	\$0	\$0	\$0
OTHER	Mean	\$127.99	\$123.72	\$155.70
	Median	\$0	\$0	\$0
TOTAL	Mean	\$369.43	\$380.06	\$300.35
	Median	\$7	\$0	\$117

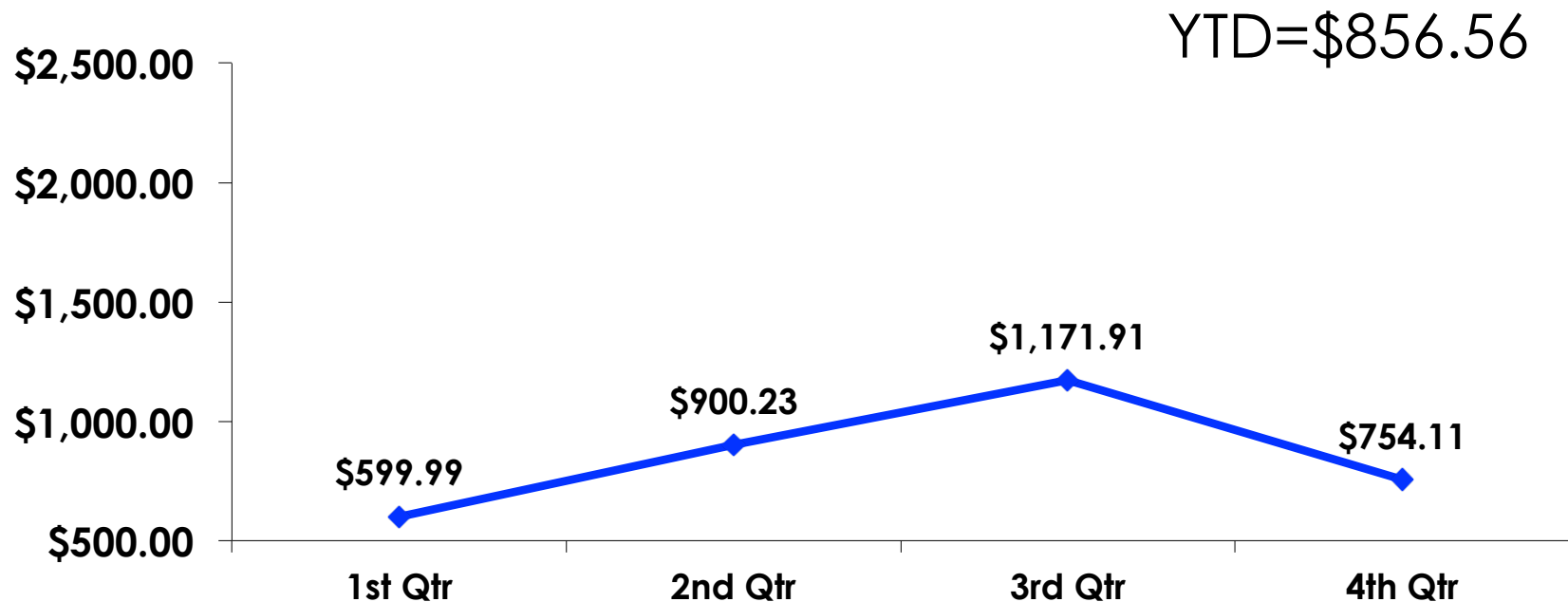
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# Total Expenditures Per Person (Prepaid & On-Island)

- \$754.11 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$9,383 = Maximum (highest amount recorded for the entire sample)

# TOTAL EXPENDITURES

## Per Person

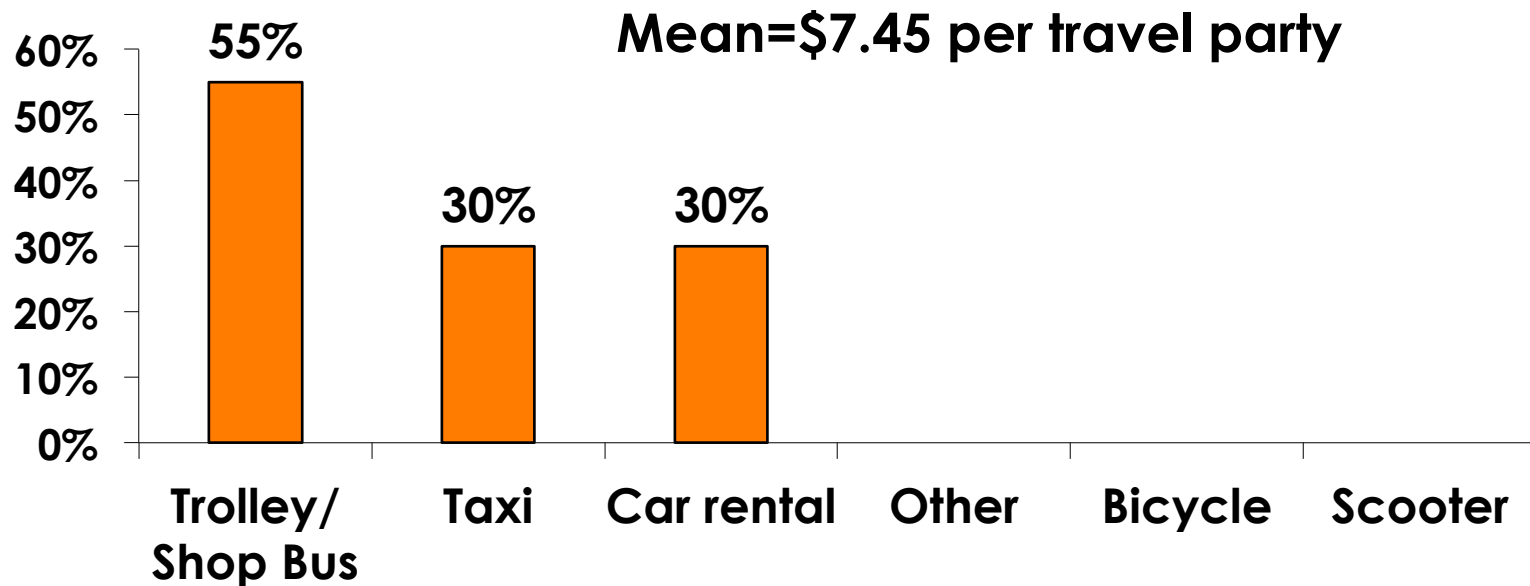


# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$9.95
Food & beverage in fast food restaurant/ convenience store	\$9.87
Food & beverage at restaurants or drinking establishments outside a hotel	\$12.35
Optional tours and activities	\$19.87
Gifts/ souvenirs for yourself/companions	\$101.76
Gifts/ souvenirs for friends/family at home	\$81.37
Local transportation	\$7.45
Other expenses not covered	\$127.99
<b>Average Total</b>	<b>\$369.43</b>

# Local Transportation

n=20



# Guam Airport Expenditures

- \$10.06 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$607 = Maximum (highest amount recorded for the entire sample)

# Breakdown of Airport Expenditures

	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	\$1.32
<b>Gifts/Souvenirs Self</b>	\$5.85
<b>Gifts/Souvenirs Others</b>	\$2.89
<b>Total</b>	<b>\$10.06</b>

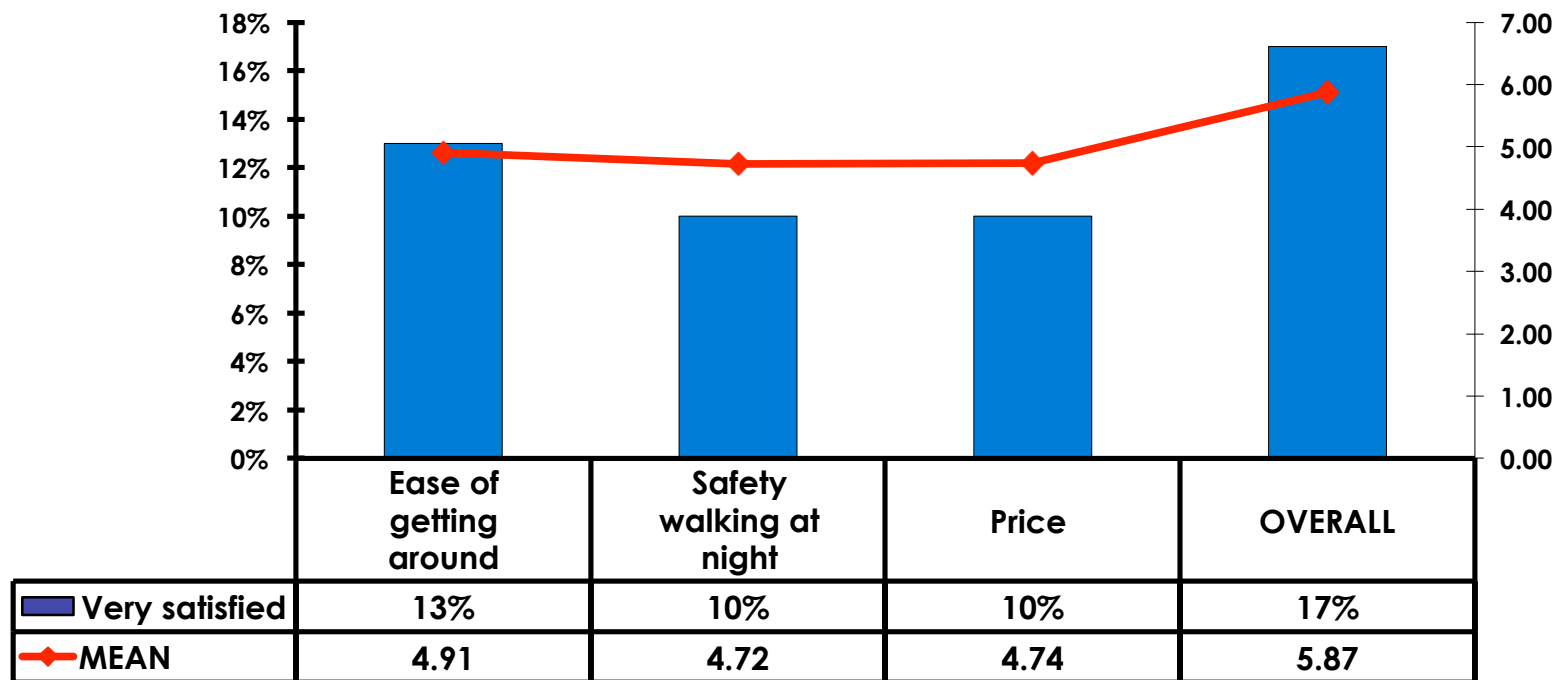
# SECTION 4 **VISITOR SATISFACTION**



# Satisfaction Scores Overall

7pt Rating Scale

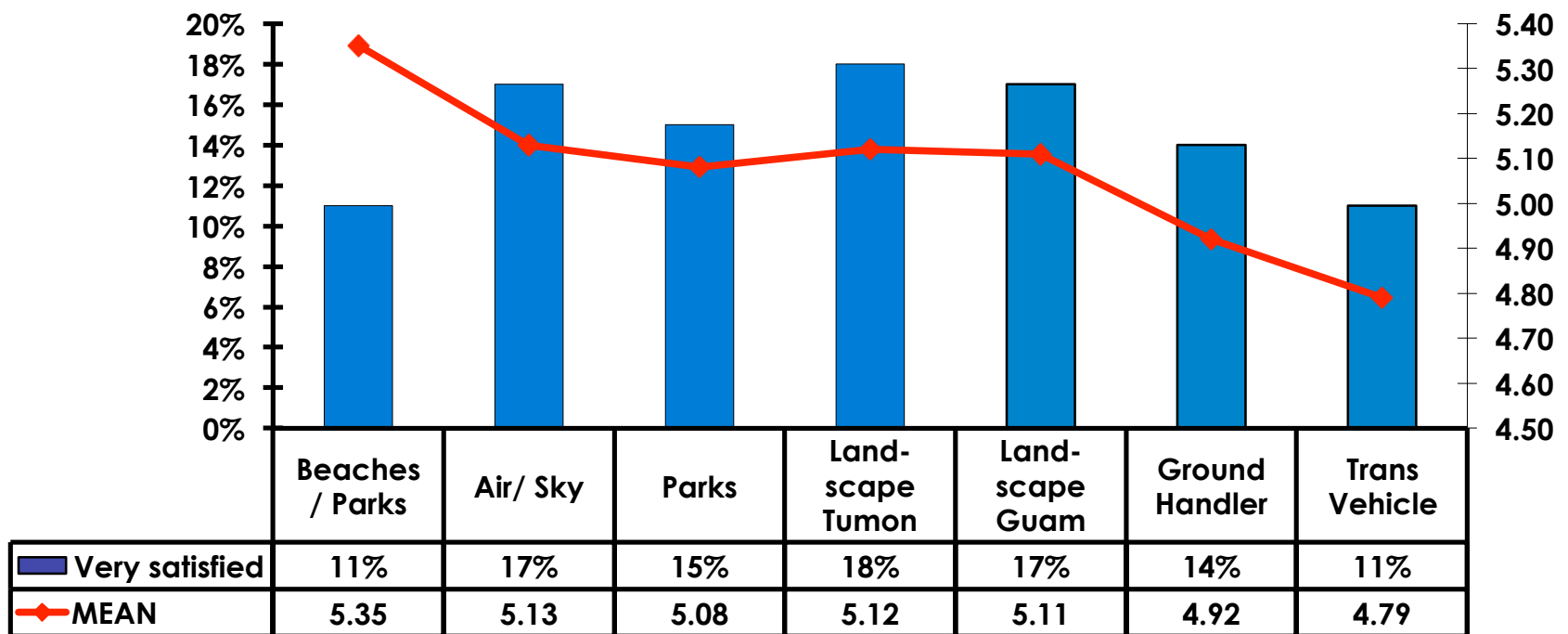
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

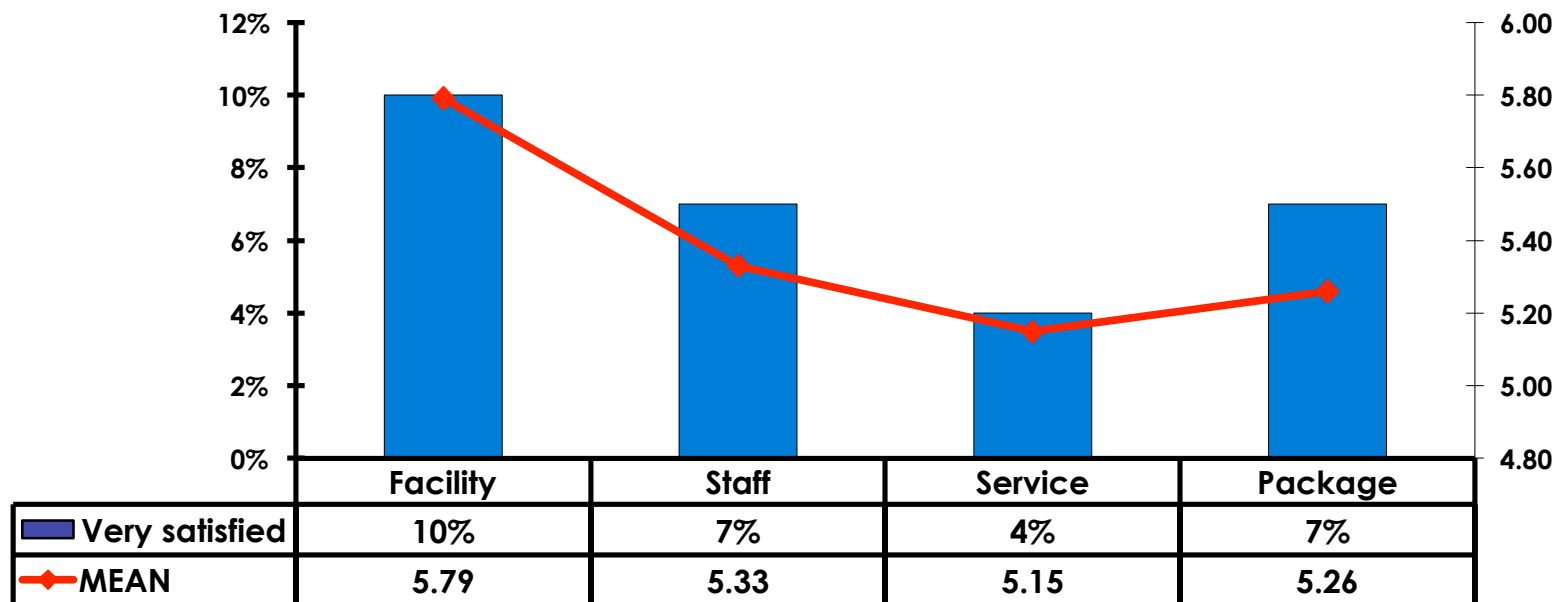
7=Very Satisfied/1=Very Dissatisfied



# Wedding Satisfaction Scores

7pt Rating Scale

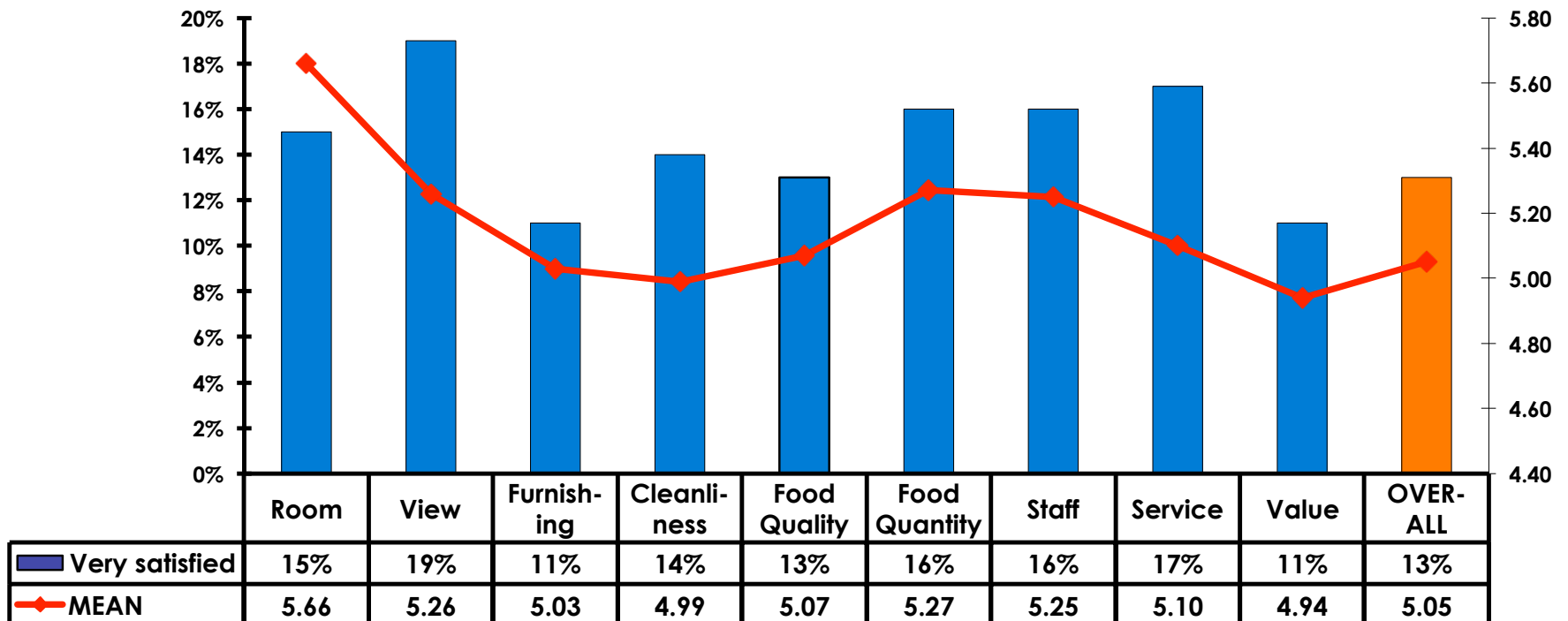
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

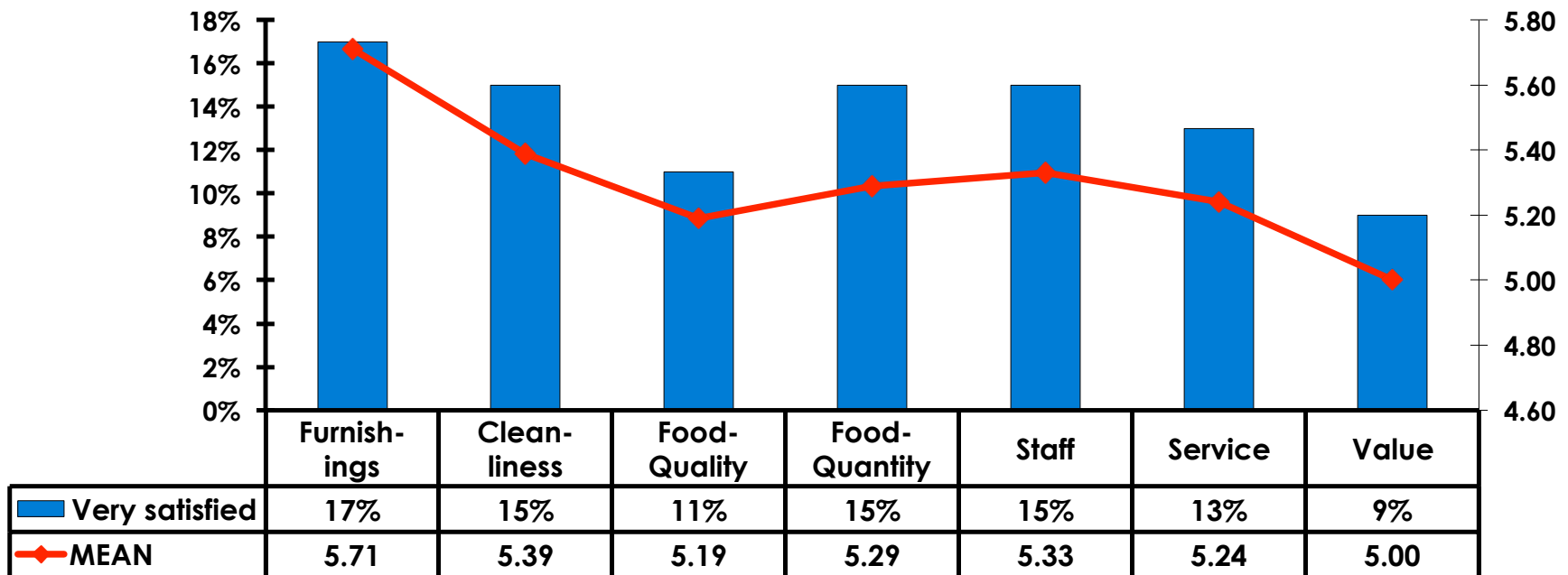
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

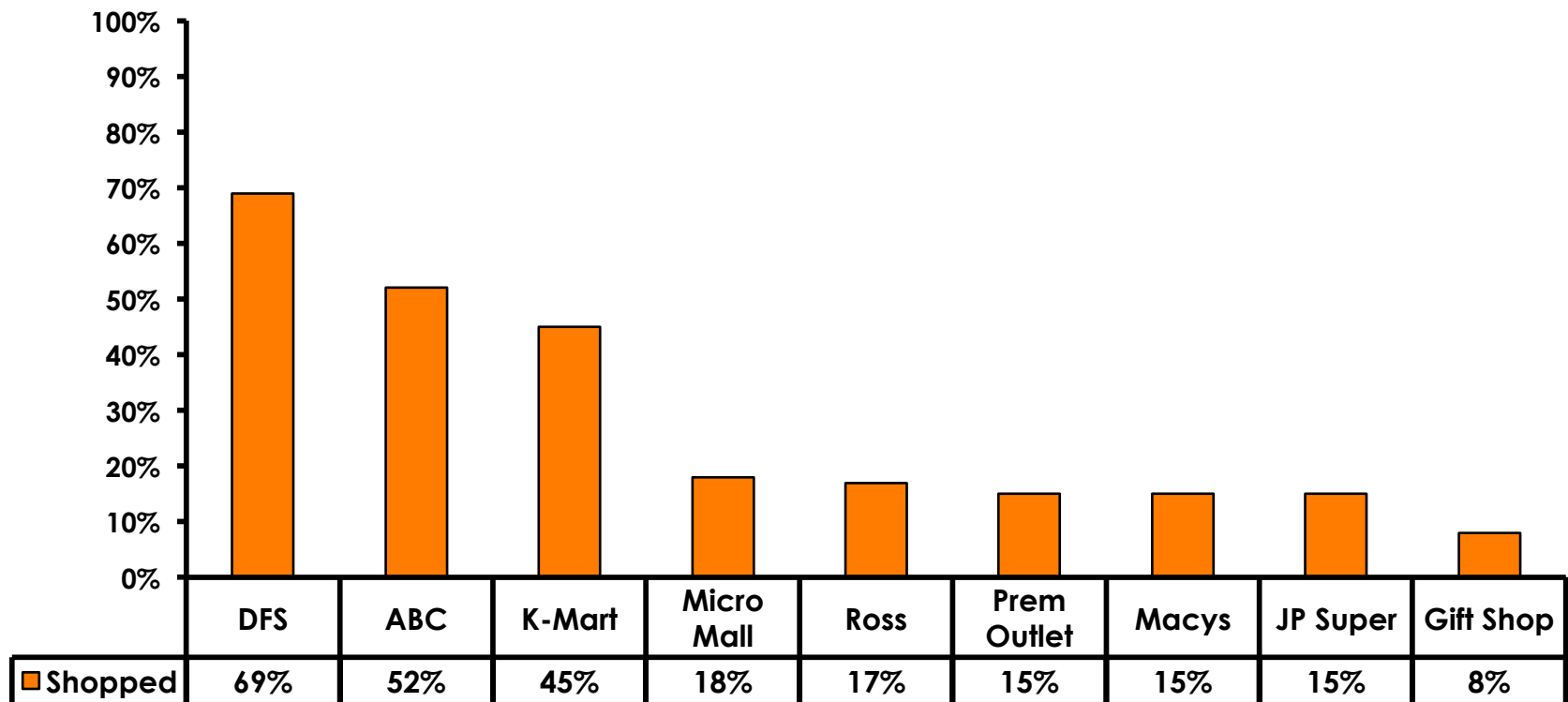
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



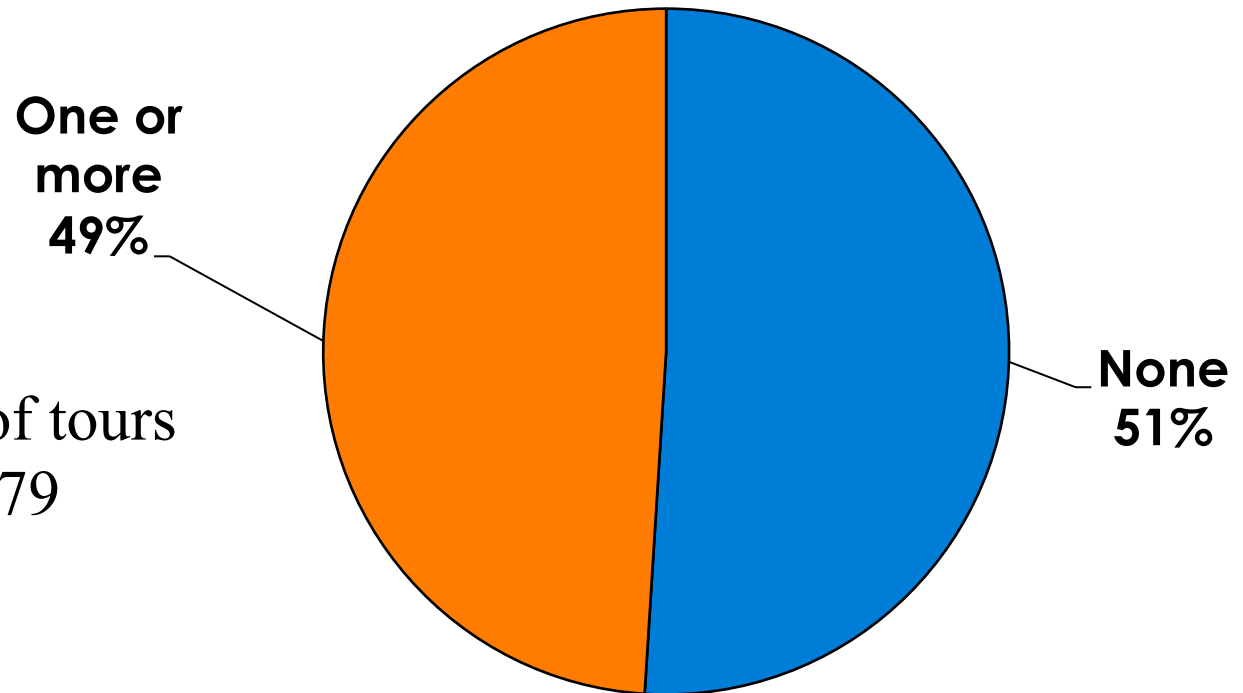
# Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>29%</b>	Score of 6 to 7 = <b>25%</b>
Score of 4 to 5 = <b>64%</b>	Score of 4 to 5 = <b>66%</b>
Score 1 to 3 = <b>6%</b>	Score 1 to 3 = <b>9%</b>
<b>MEAN = 4.97</b>	<b>MEAN = 4.90</b>

# Optional Tour Participation

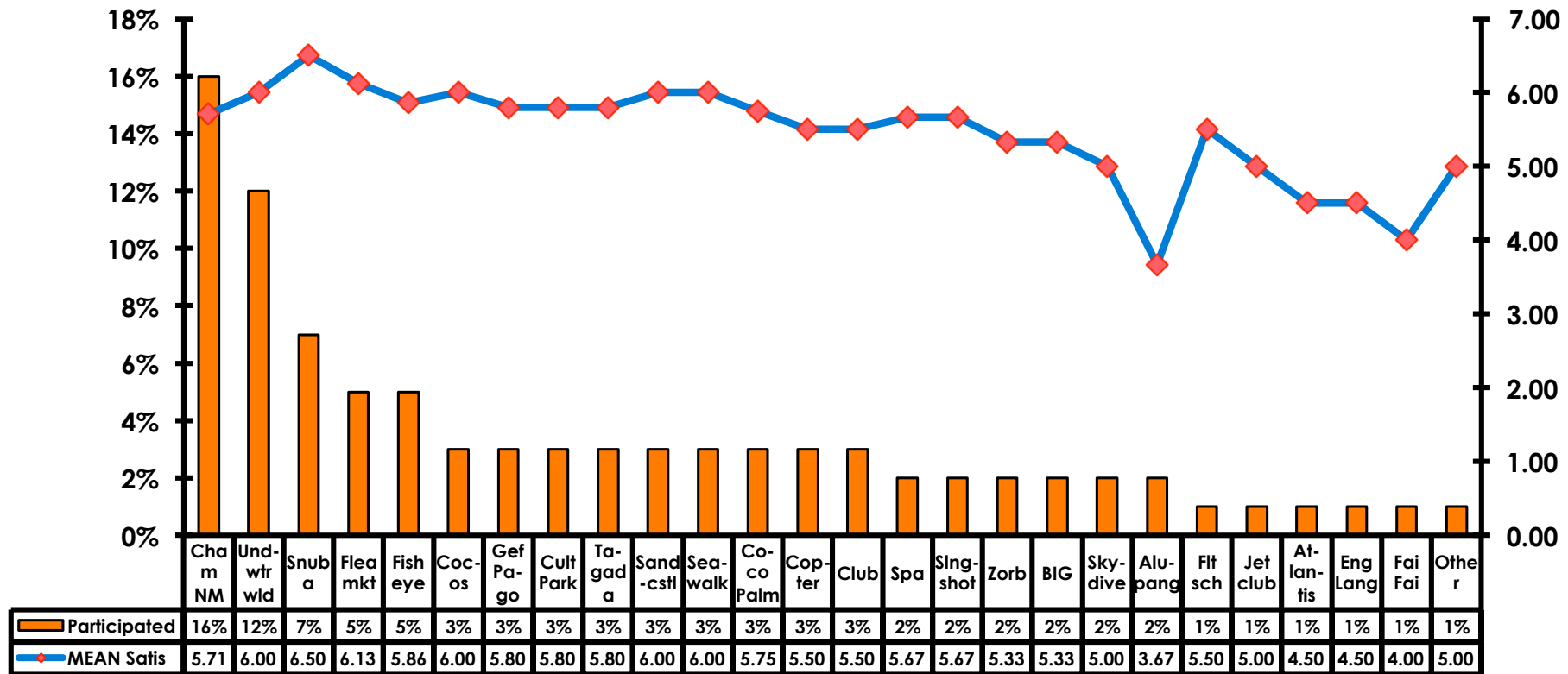


- Average number of tours participated in is .79



# 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>29%</b>	Score of 6 to 7 = <b>32%</b>
Score of 4 to 5 = <b>57%</b>	Score of 4 to 5 = <b>55%</b>
Score 1 to 3 = <b>15%</b>	Score 1 to 3 = <b>15%</b>
<b>MEAN = 4.76</b>	<b>MEAN = 4.80</b>

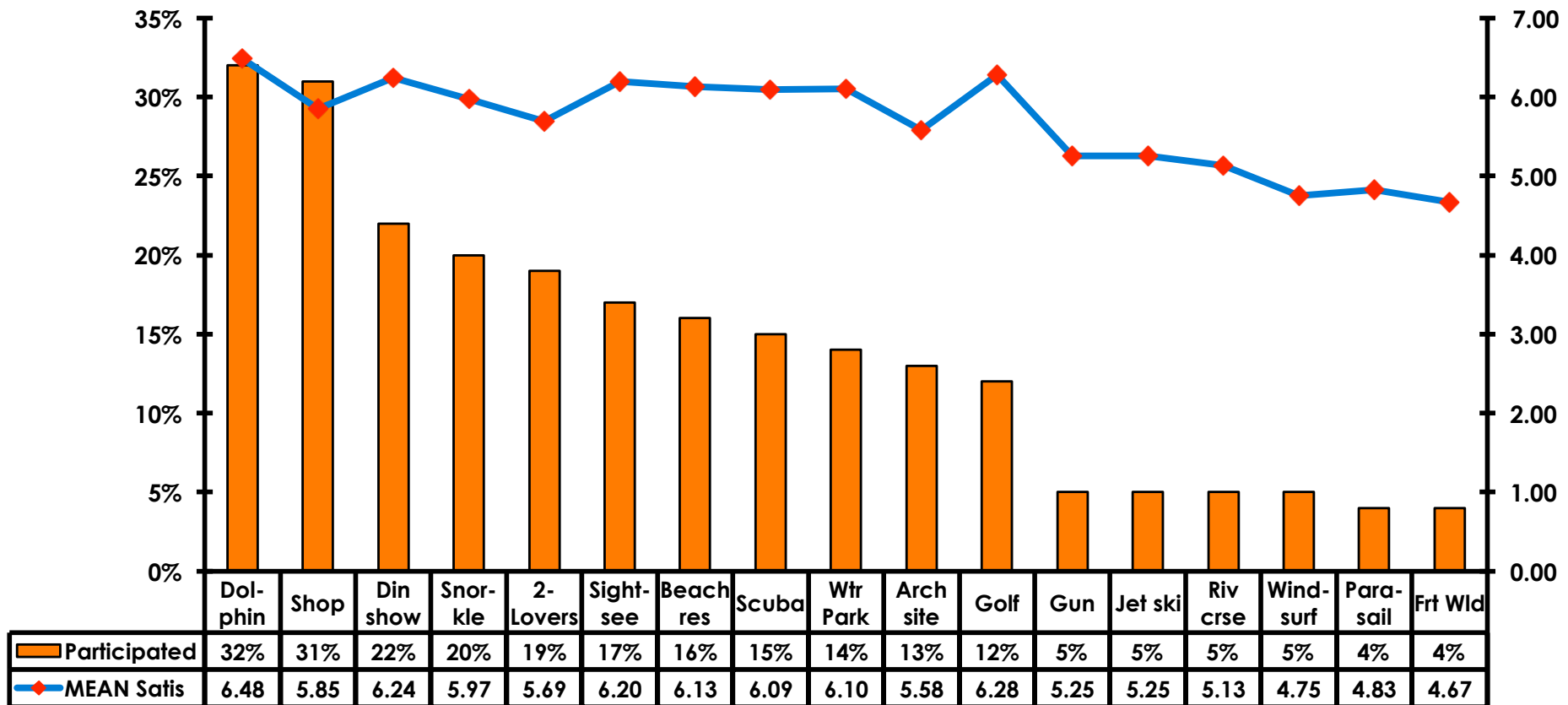
# Night Tours Satisfaction

7pt Rating Scale

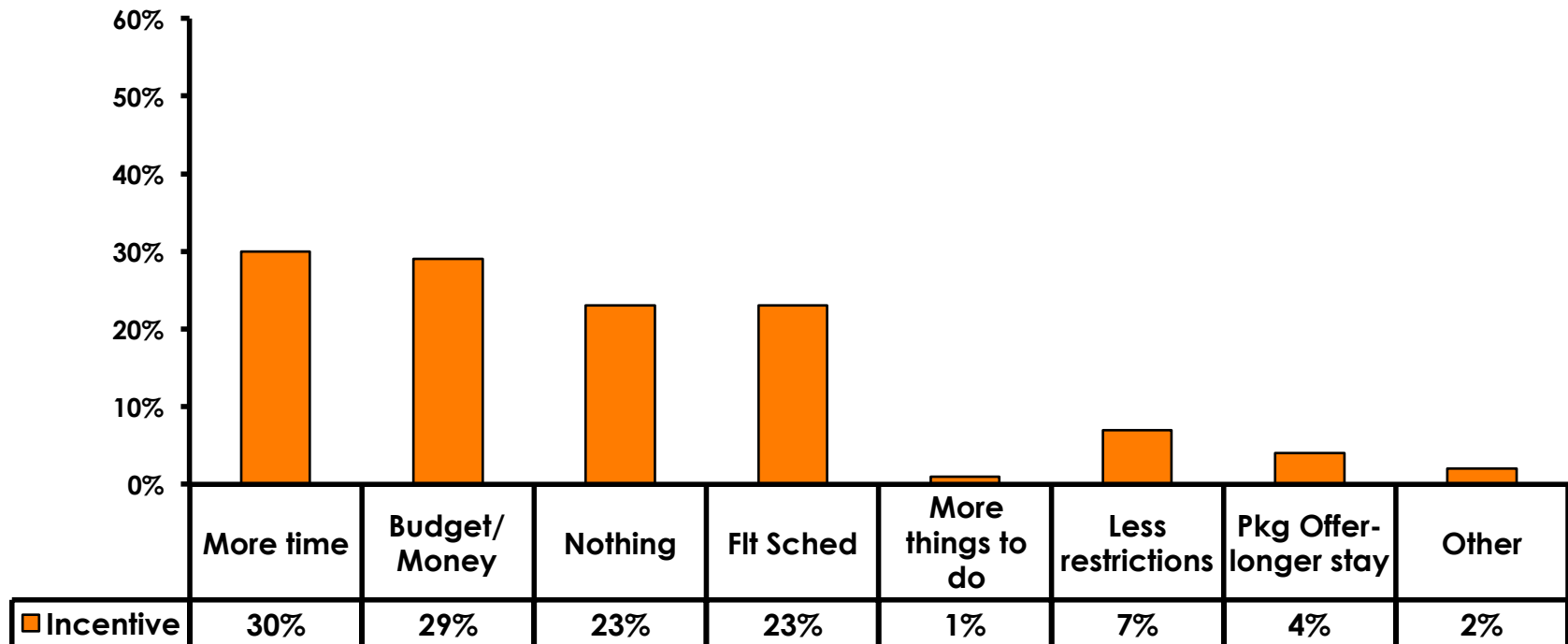
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>27%</b>	Score of 6 to 7 = <b>28%</b>
Score of 4 to 5 = <b>63%</b>	Score of 4 to 5 = <b>65%</b>
Score 1 to 3 = <b>9%</b>	Score 1 to 3 = <b>7%</b>
<b>MEAN = 4.78</b>	<b>MEAN = 4.86</b>

# Satisfaction with Other Activities



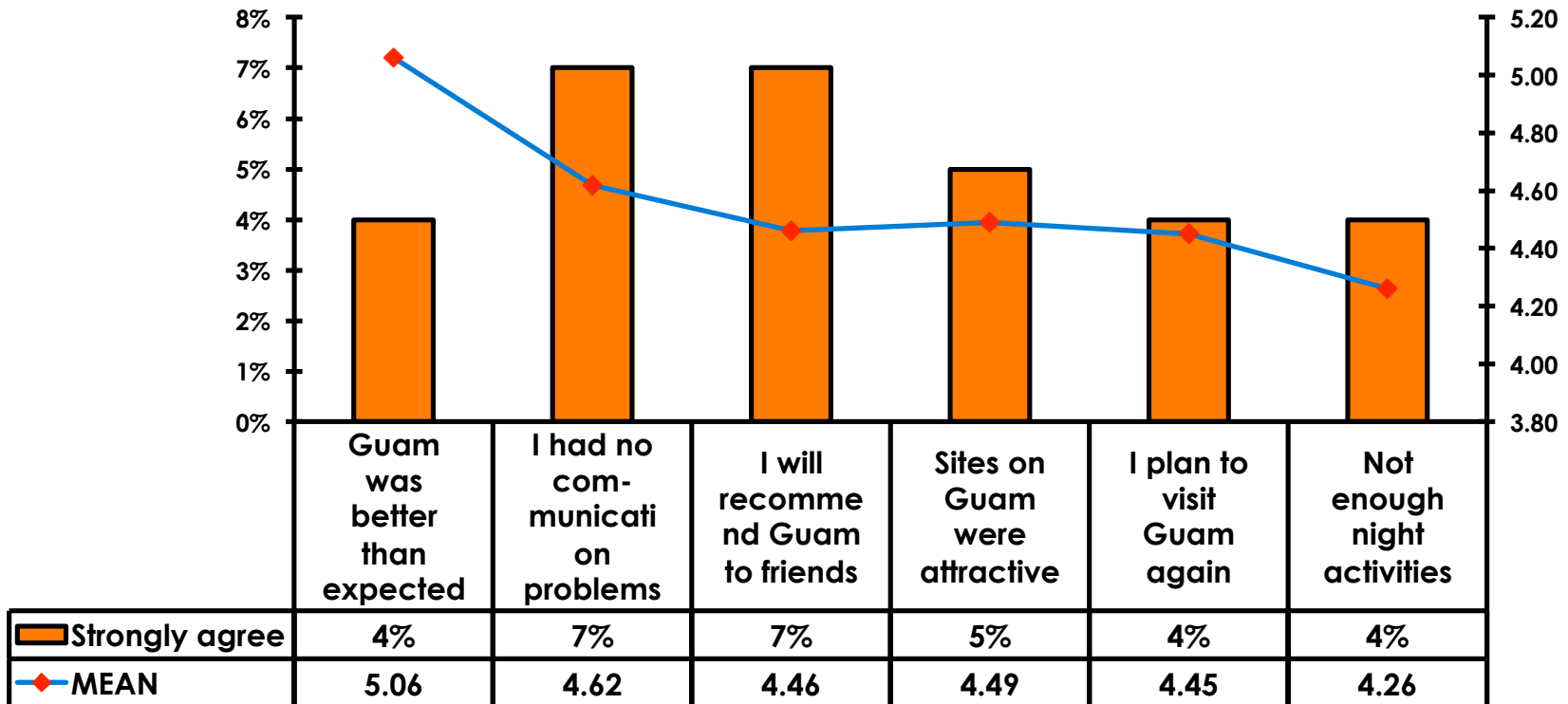
# What would it take to make you want to stay an extra day in Guam?



# On-Island Perceptions

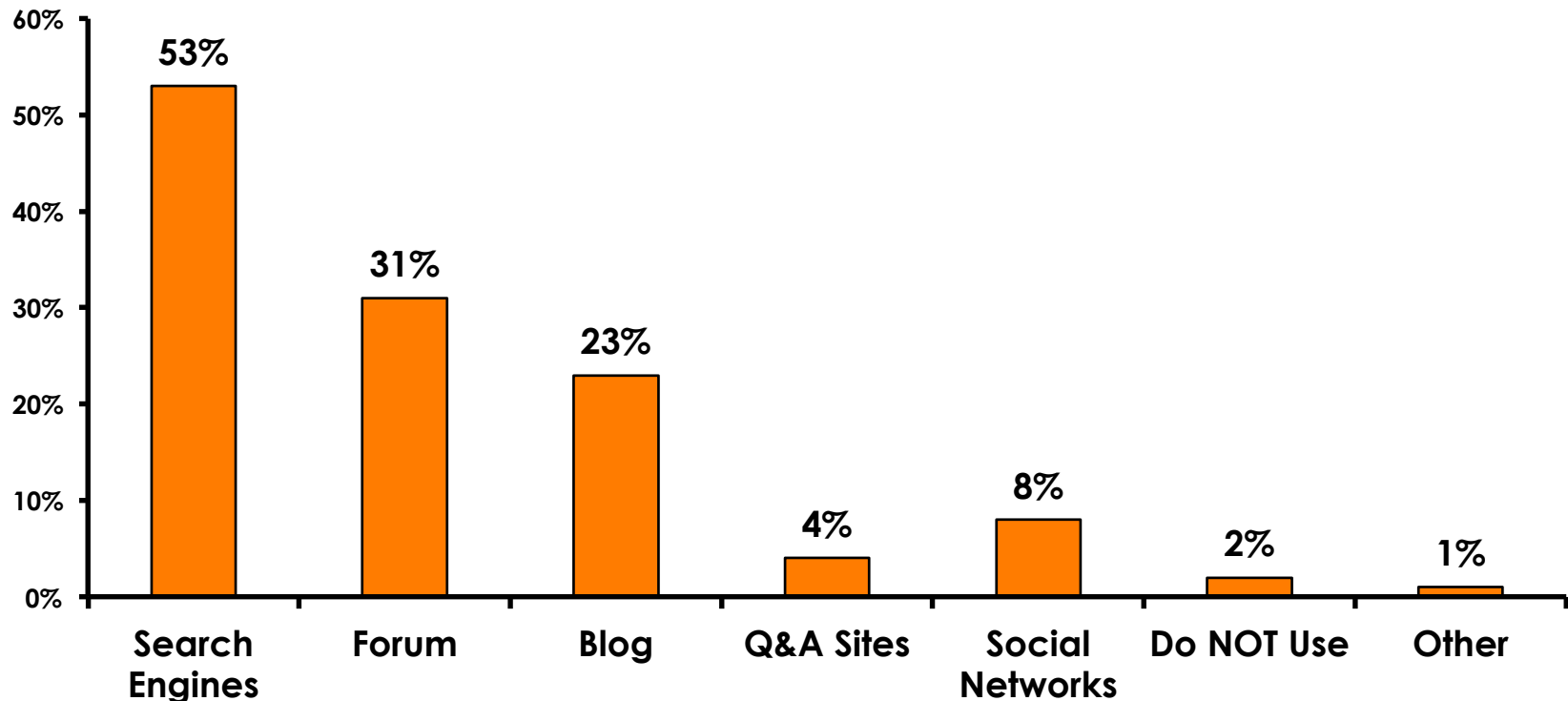
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



# SECTION 5 **PROMOTIONS**

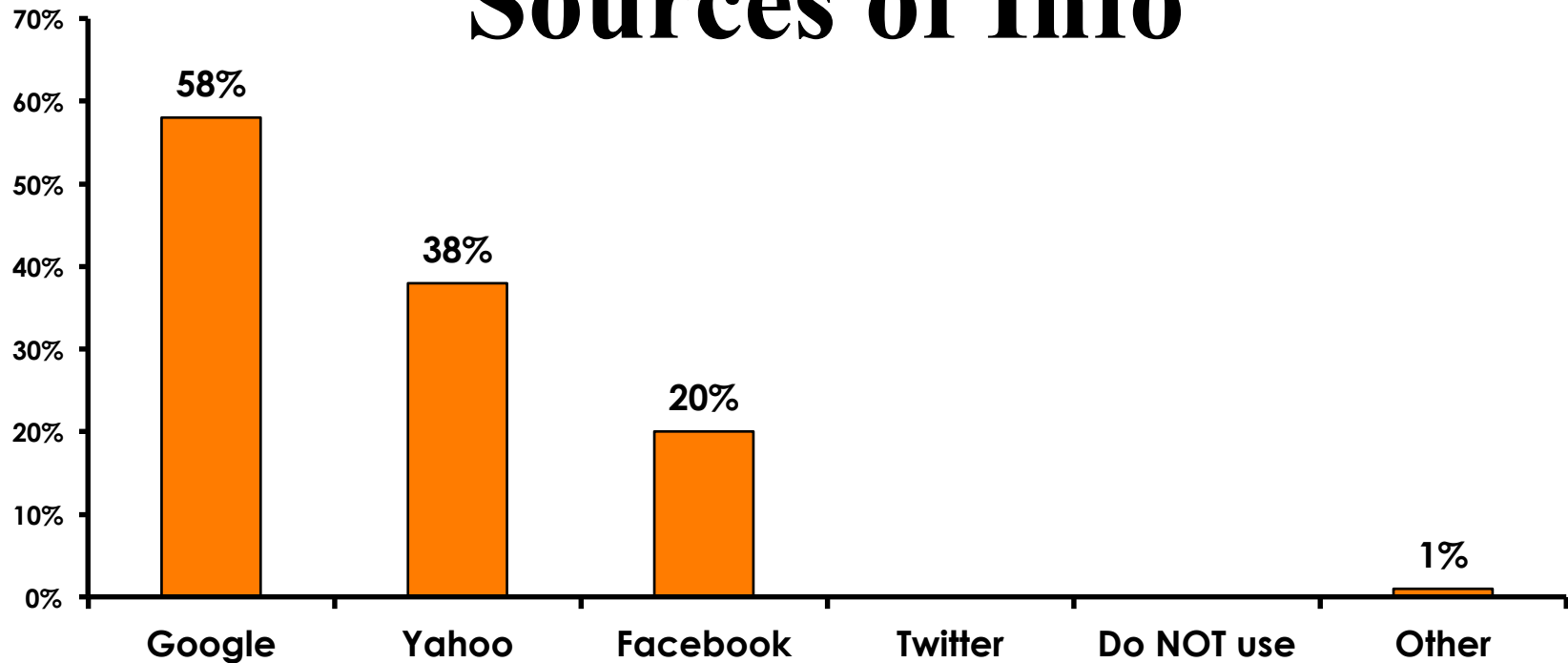
# Internet- Guam Sources of Info



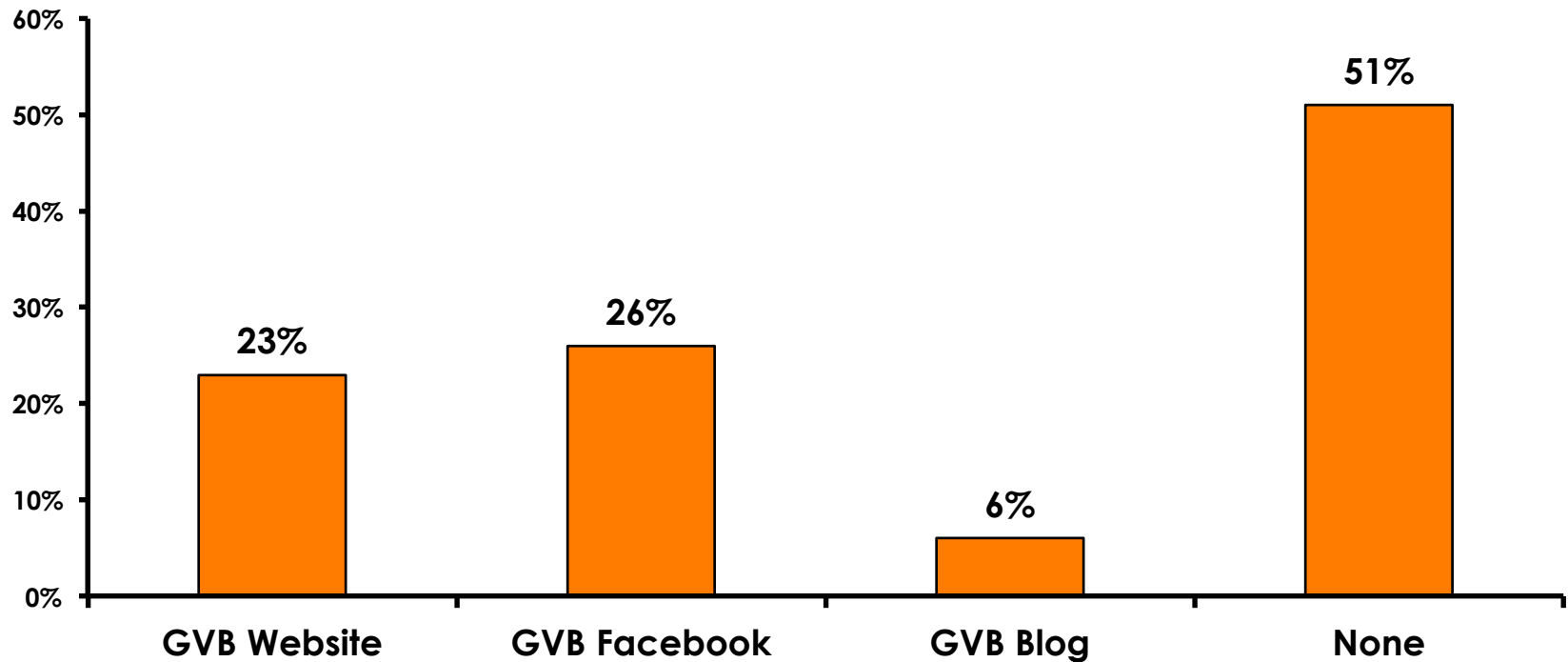


# Internet- Things To Do

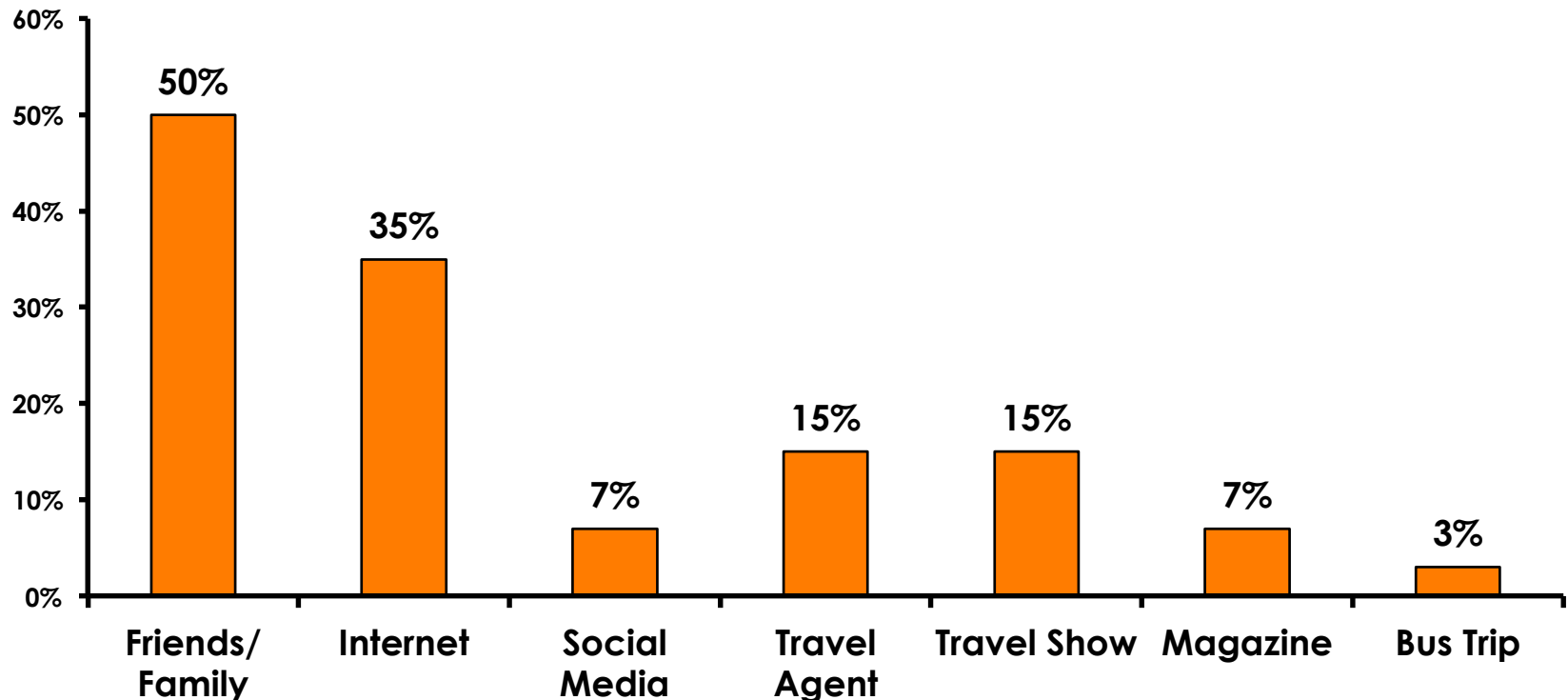
## Sources of Info



# Internet- GVB Sources

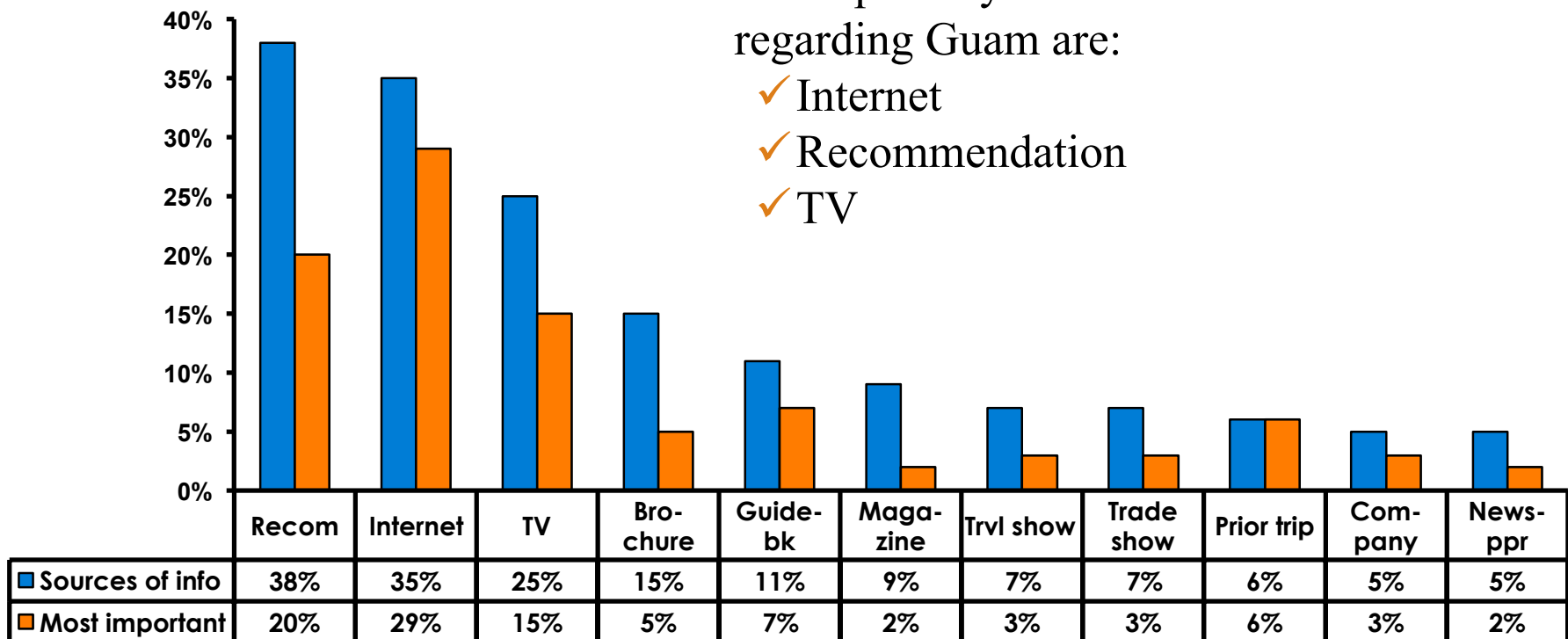


# Travel Motivation- Info Sources



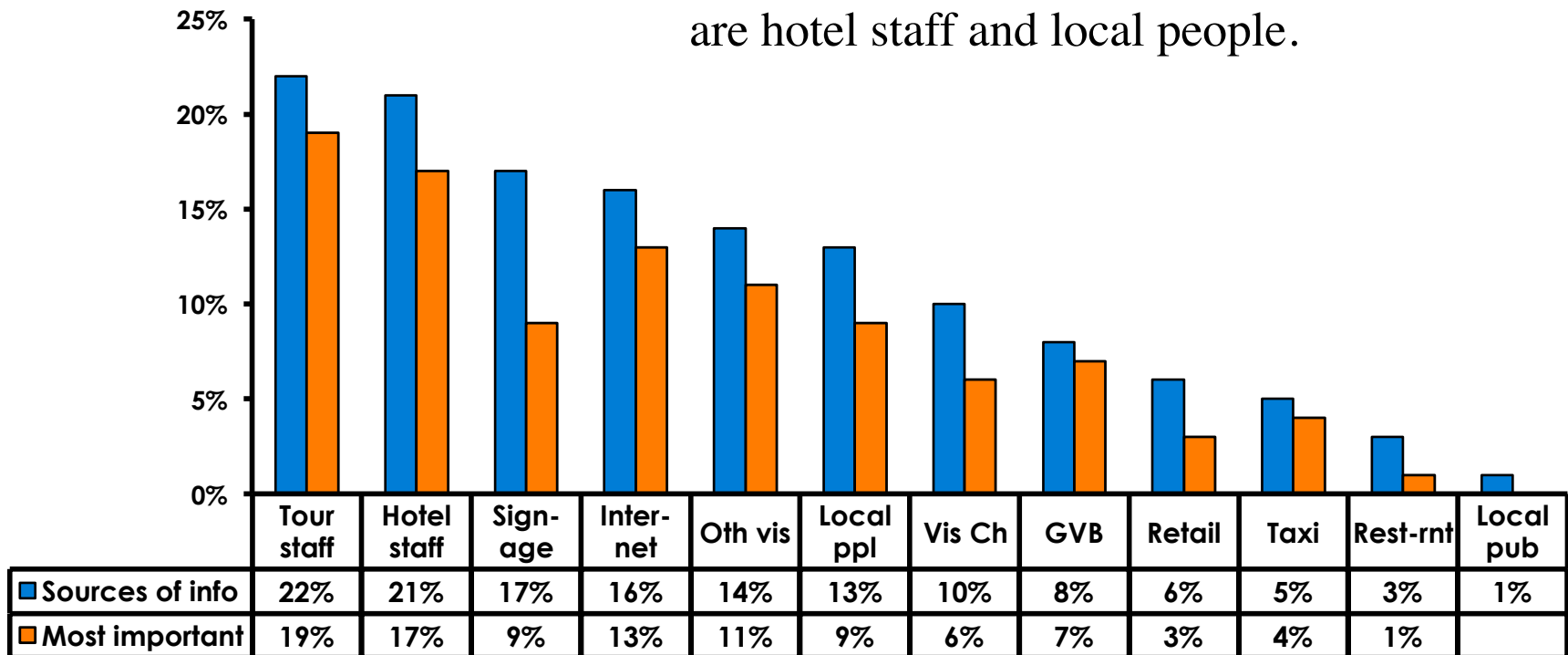
# Sources of Information Pre-arrival

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



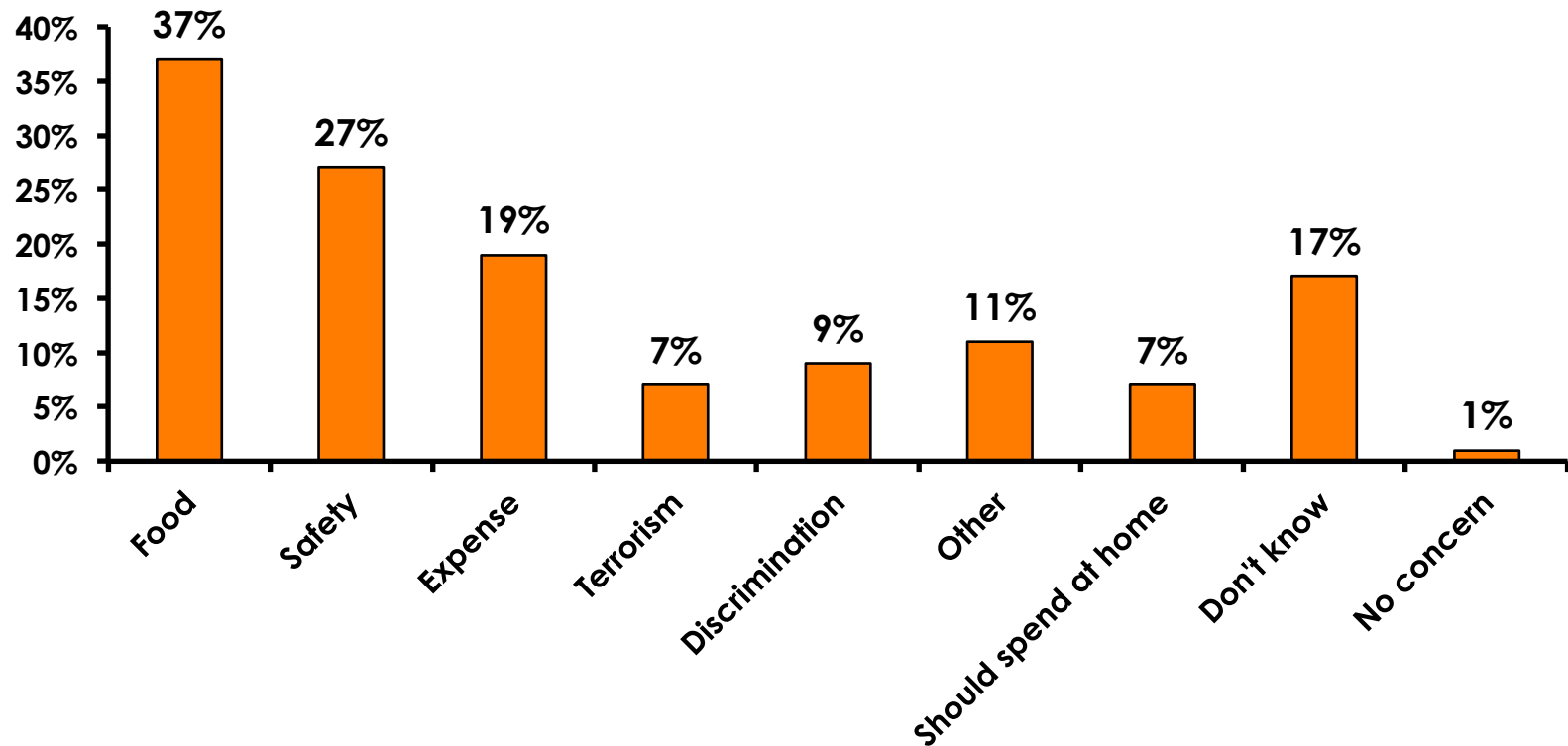
# Sources of Information Post-arrival

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



# SECTION 6 **OTHER ISSUES**

# Concerns about travel outside of Taiwan - Overall

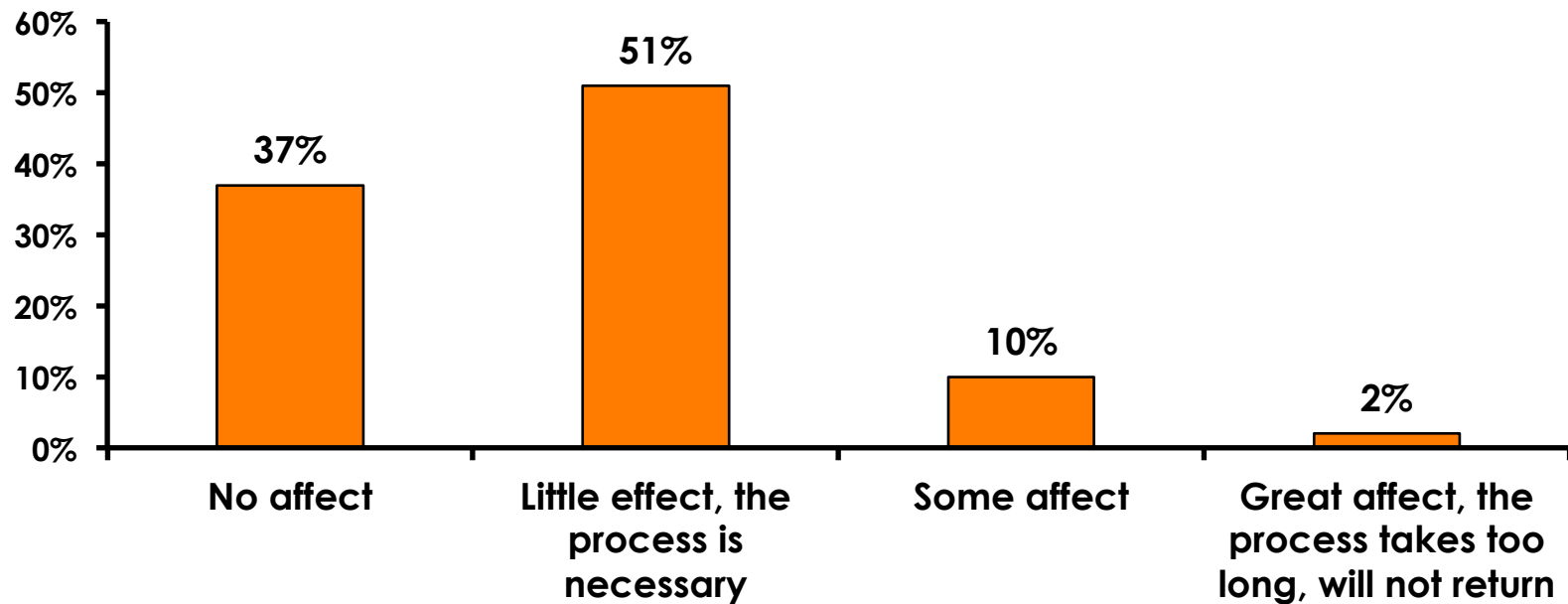


# Concerns about travel outside of Taiwan - By Age & Income

		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	37%	27%	33%	41%	80%		100%	30%	45%	52%	38%	20%	100%
	Safety	27%	45%	32%	17%		33%	50%	40%	32%	16%	38%	45%	
	Expense	19%	45%	22%	10%		33%	50%	30%	26%	19%	25%	20%	
	Don't know	17%	9%	13%	29%	20%			30%	11%		50%	55%	
	Other	11%		14%	7%				30%	16%	10%		5%	
	Discrimination against Taiwanese	9%	9%	12%	2%				10%		10%			
	Terrorism	7%	9%	9%	5%		33%			5%	16%			
	Should spend at home	7%		8%	7%		33%		10%	5%	10%			
	No concerns	1%		1%						3%				
	Total	Count	150	11	92	41	5	3	2	10	38	31	8	



# Security Screening/ Immigration Process at Guam International Airport



# Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

