



# **GUAM VISITORS BUREAU**

## **Taiwan Visitor Tracker Exit Profile**

### **FY2014**

### **2nd Qtr. (JAN~MAR 2014)**



**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.

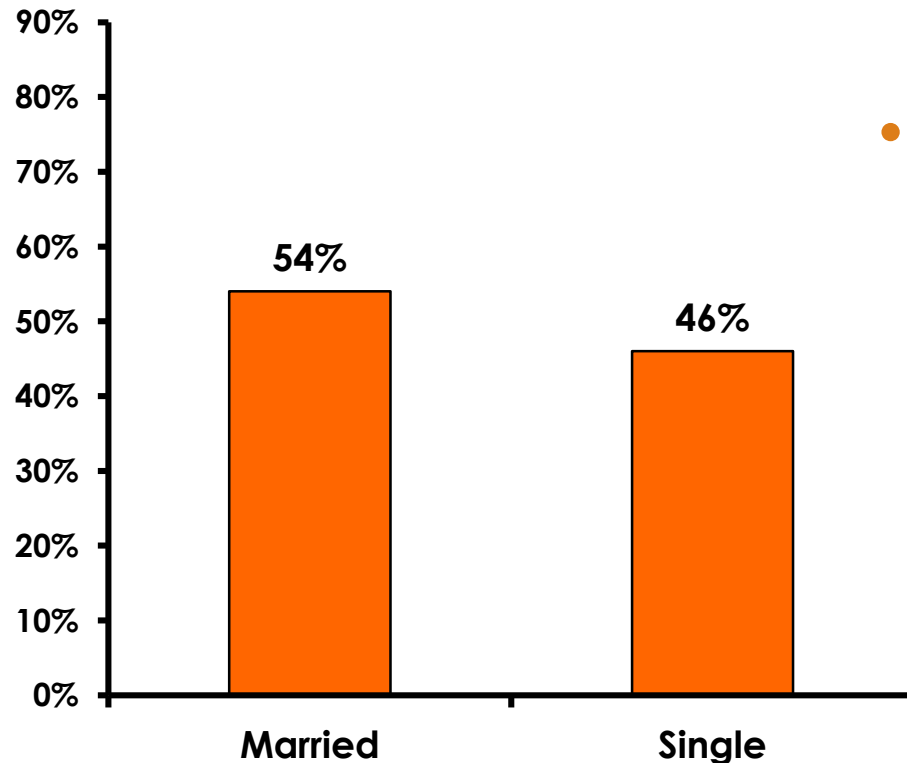
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# OBJECTIVES

- 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.

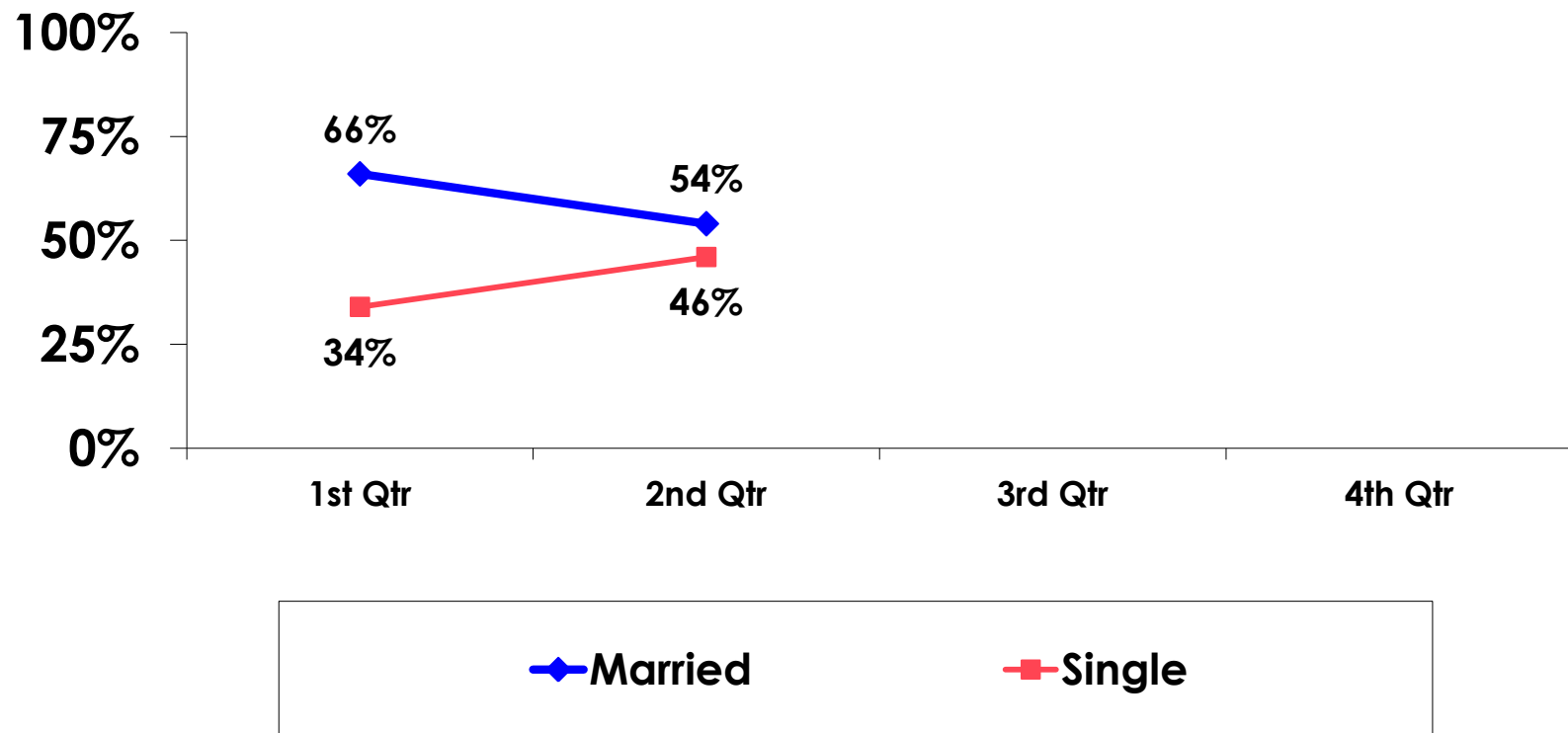
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

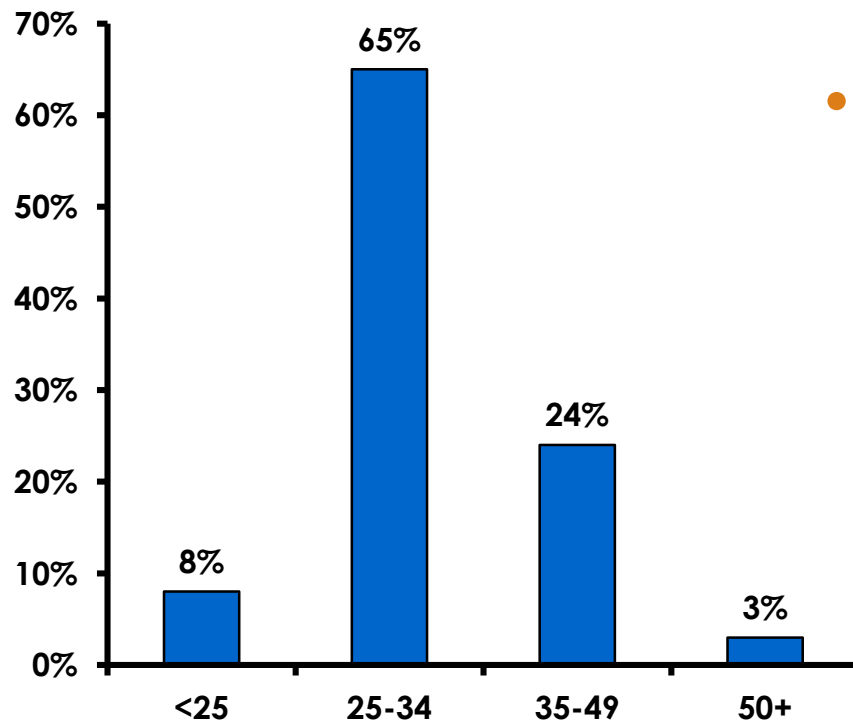


- Near equal split among single and married visitors.

# MARITAL STATUS

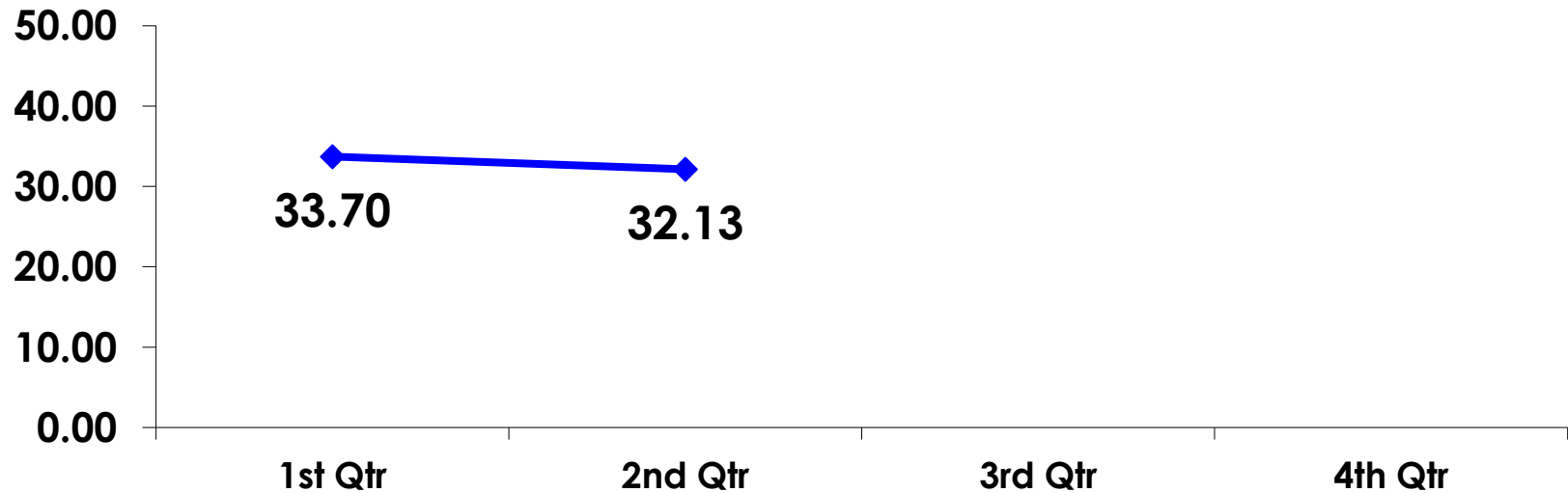


# Age - Overall



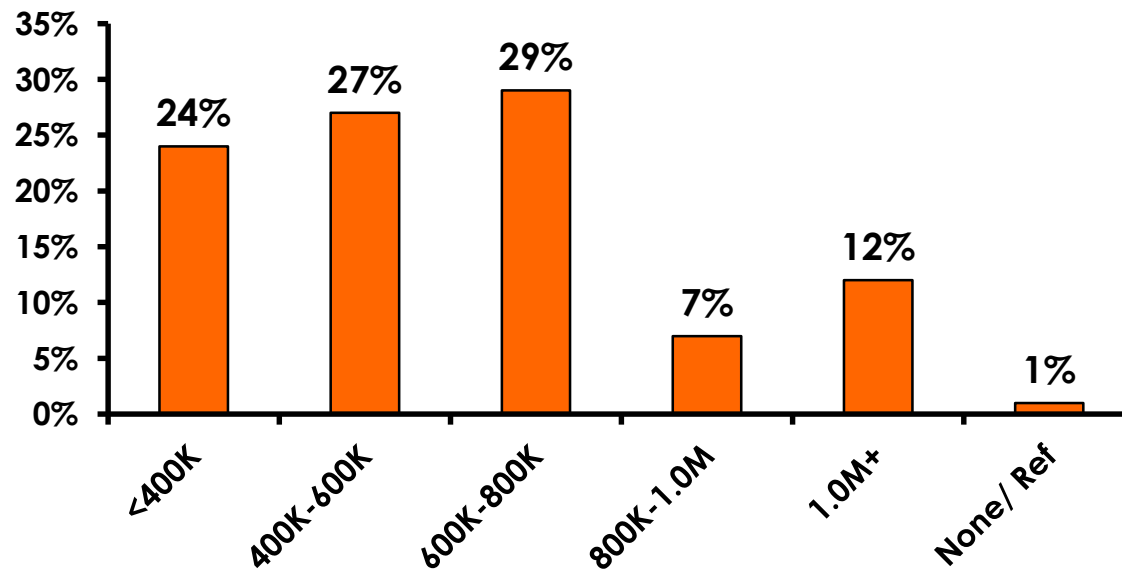
- The average age of the respondents is 32.13 years of age.

# AVERAGE - AGE



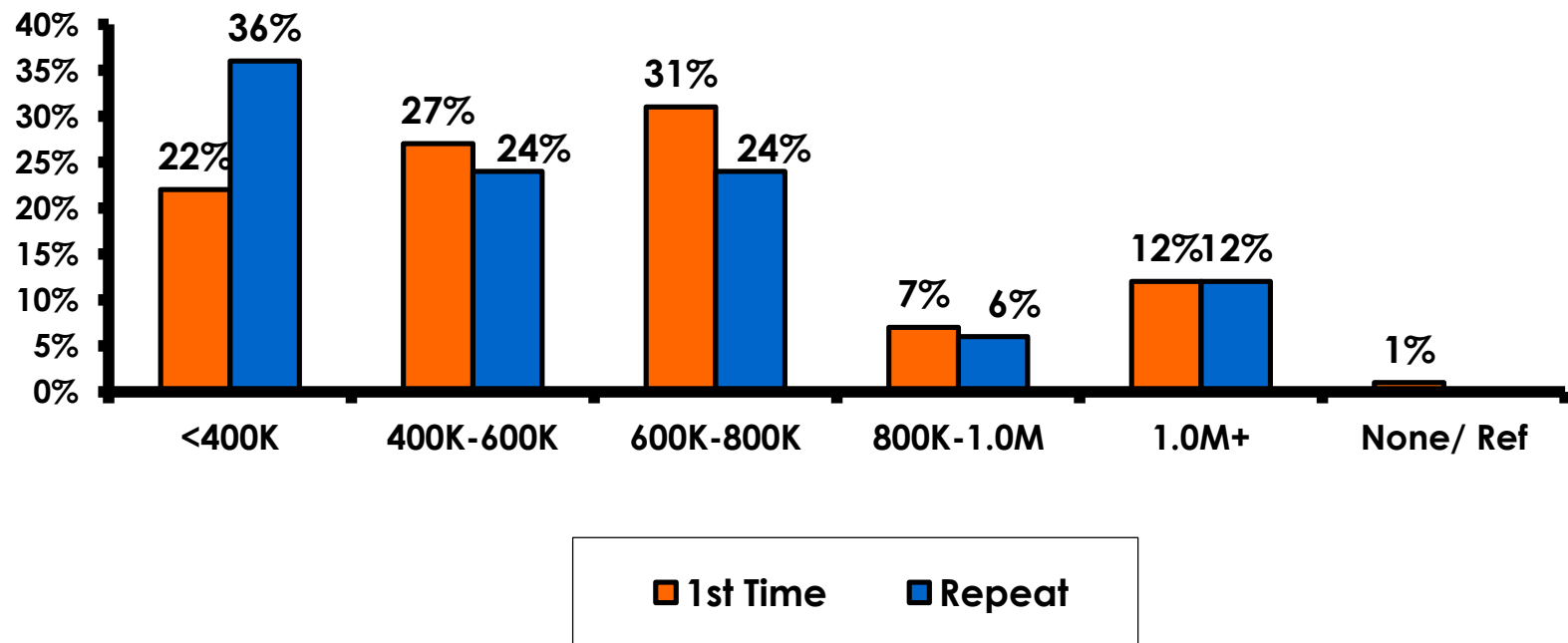


# Personal Income



- TWD30.27=\$1

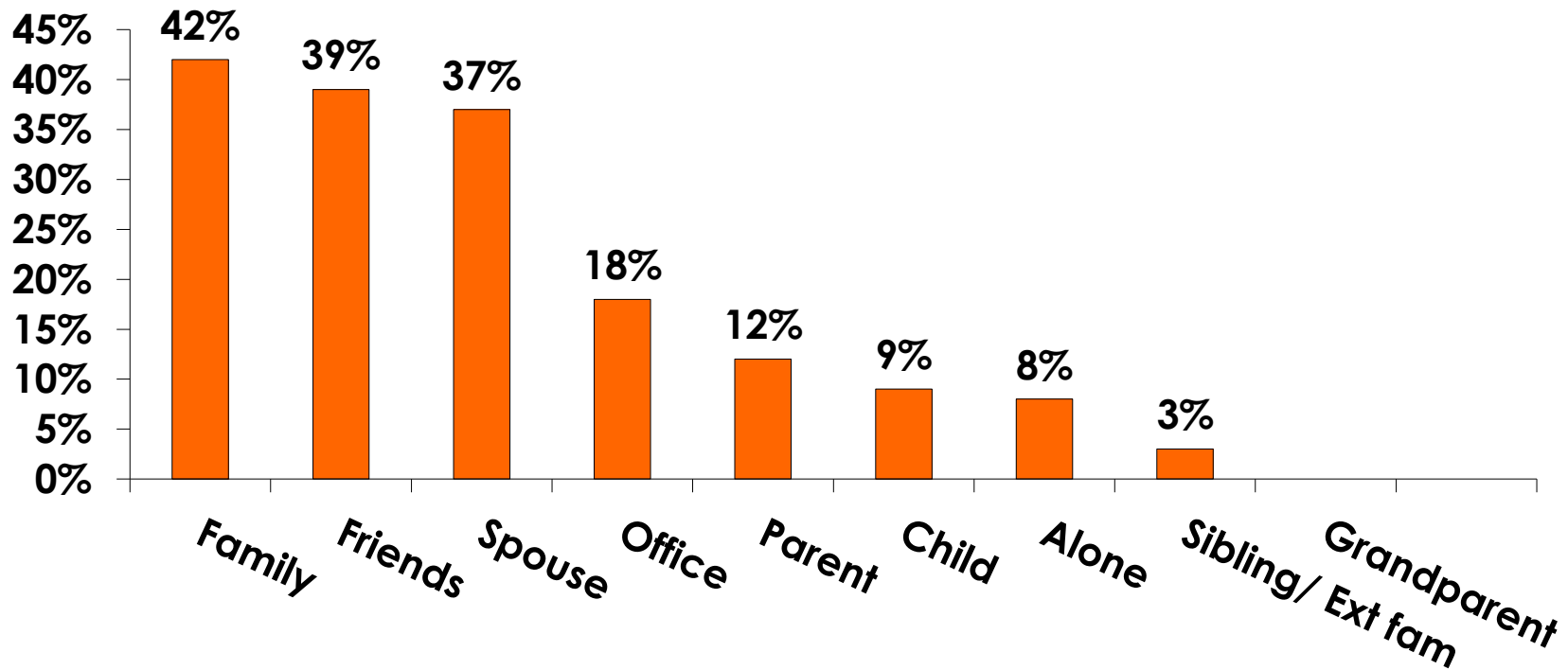
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<=NT160K	Count	6	4	2	1	4	1	
		Column N %	5%	7%	4%	13%	5%	4%	
	NT160K-NT200K	Count	7	3	4		6	1	
		Column N %	6%	5%	8%		8%	4%	
	NT200K-NT400K	Count	14	4	10	3	10	1	
		Column N %	13%	7%	20%	38%	13%	4%	
	NT400K-NT600K	Count	30	19	11	1	23	6	
		Column N %	27%	31%	22%	13%	29%	26%	
	NT600K-NT800K	Count	33	16	17	2	23	7	1
		Column N %	29%	26%	33%	25%	29%	30%	50%
	NT800K-NT1.0M	Count	8	7	1		6	2	
		Column N %	7%	11%	2%		8%	9%	
	NT1.0M+	Count	13	7	6	1	6	5	1
		Column N %	12%	11%	12%	13%	8%	22%	50%
	No Income	Count	1	1			1		
		Column N %	1%	2%			1%		
Total		Count	112	61	51	8	79	23	2

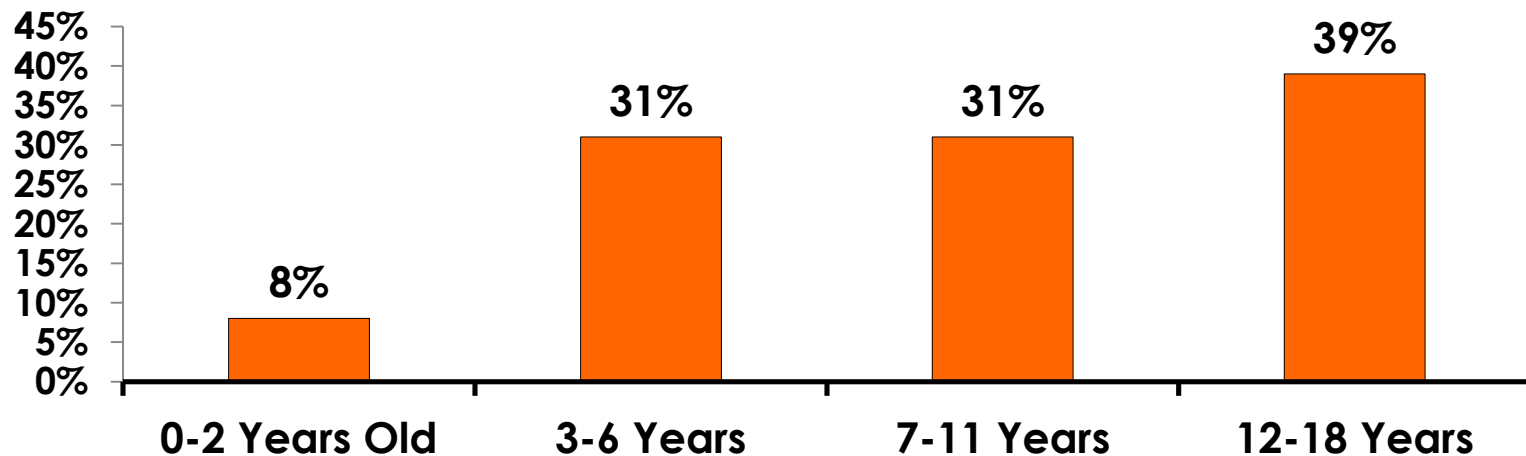
# Travel Companions



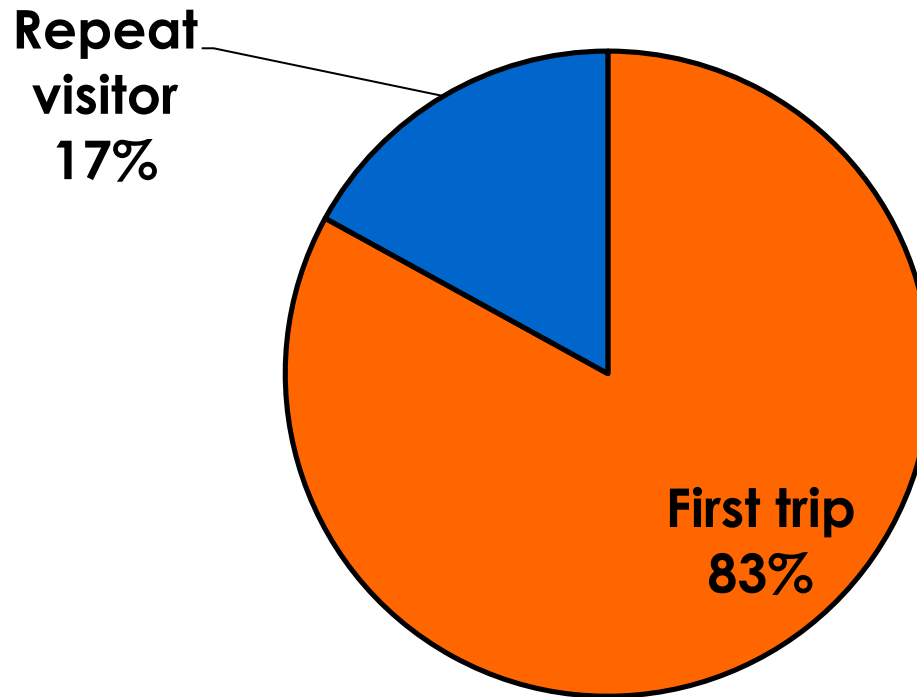
# Number of Children Travel Party

N=13 total respondents traveling with children.

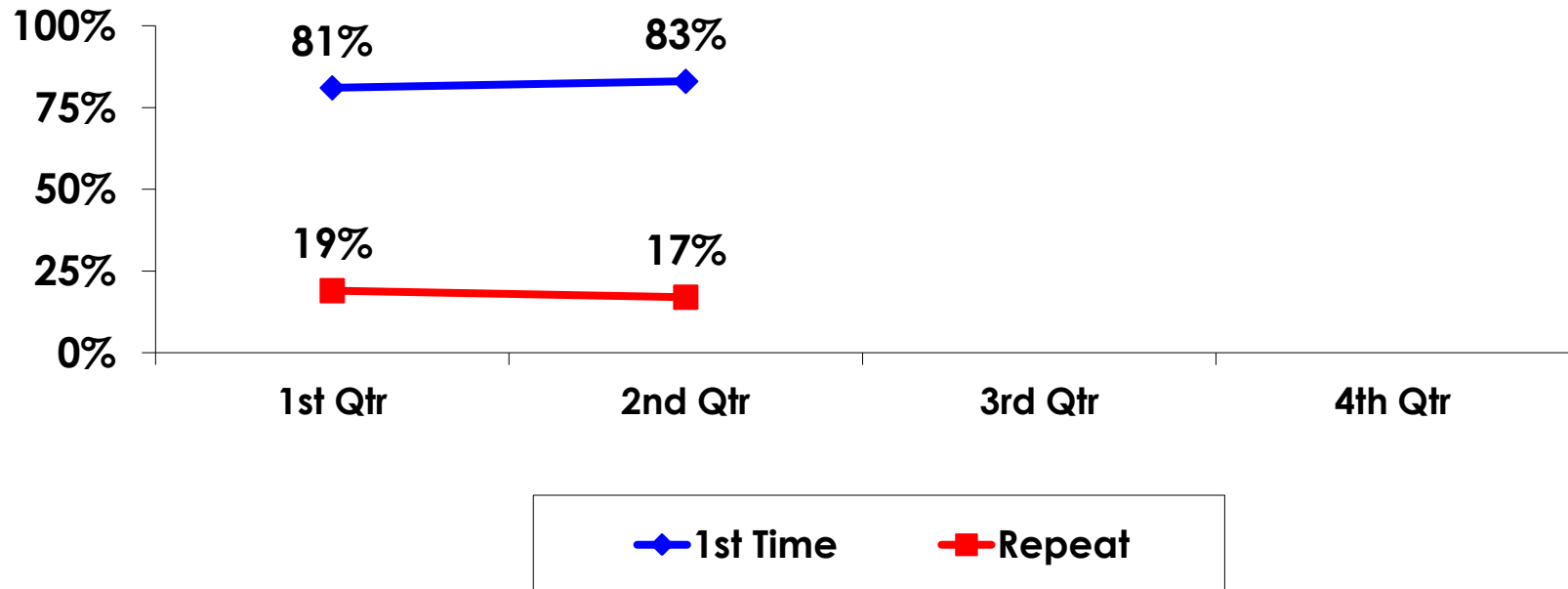
(Of those N=13 respondents, there is a total of 14 children 18 years or younger)



# Prior Trips to Guam



# PRIOR TRIPS TO GUAM



# Trips to Guam by Age & Gender

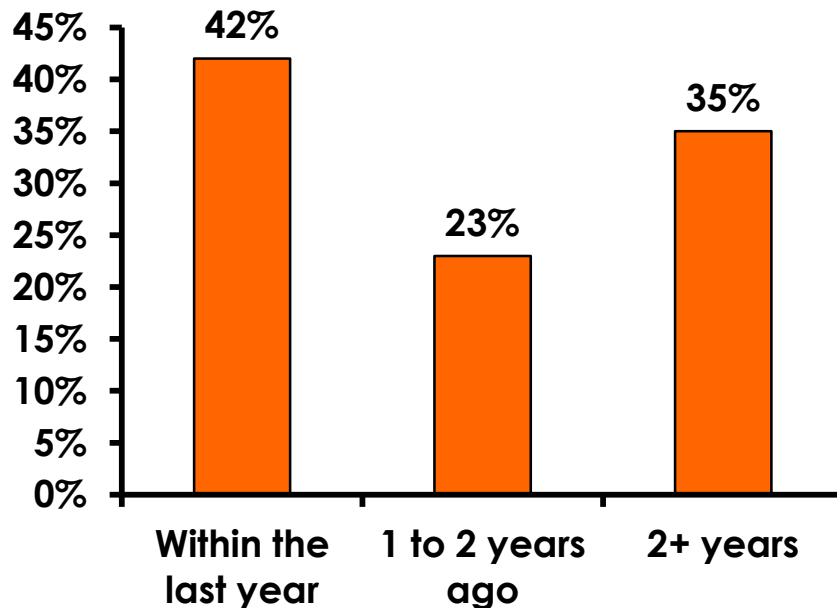
			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	78	62	16	
		Column N %	52%	50%	62%	
	Female	Count	72	62	10	
		Column N %	48%	50%	38%	
	Total	Count	150	124	26	
AGE	18-24	Count	12	10	2	
		Column N %	8%	8%	8%	
	25-34	Count	97	86	11	
		Column N %	65%	69%	42%	
	35-49	Count	36	26	10	
		Column N %	24%	21%	38%	
	50+	Count	5	2	3	
		Column N %	3%	2%	12%	
		Total	Count	150	124	26

- First time visitors are younger on average.



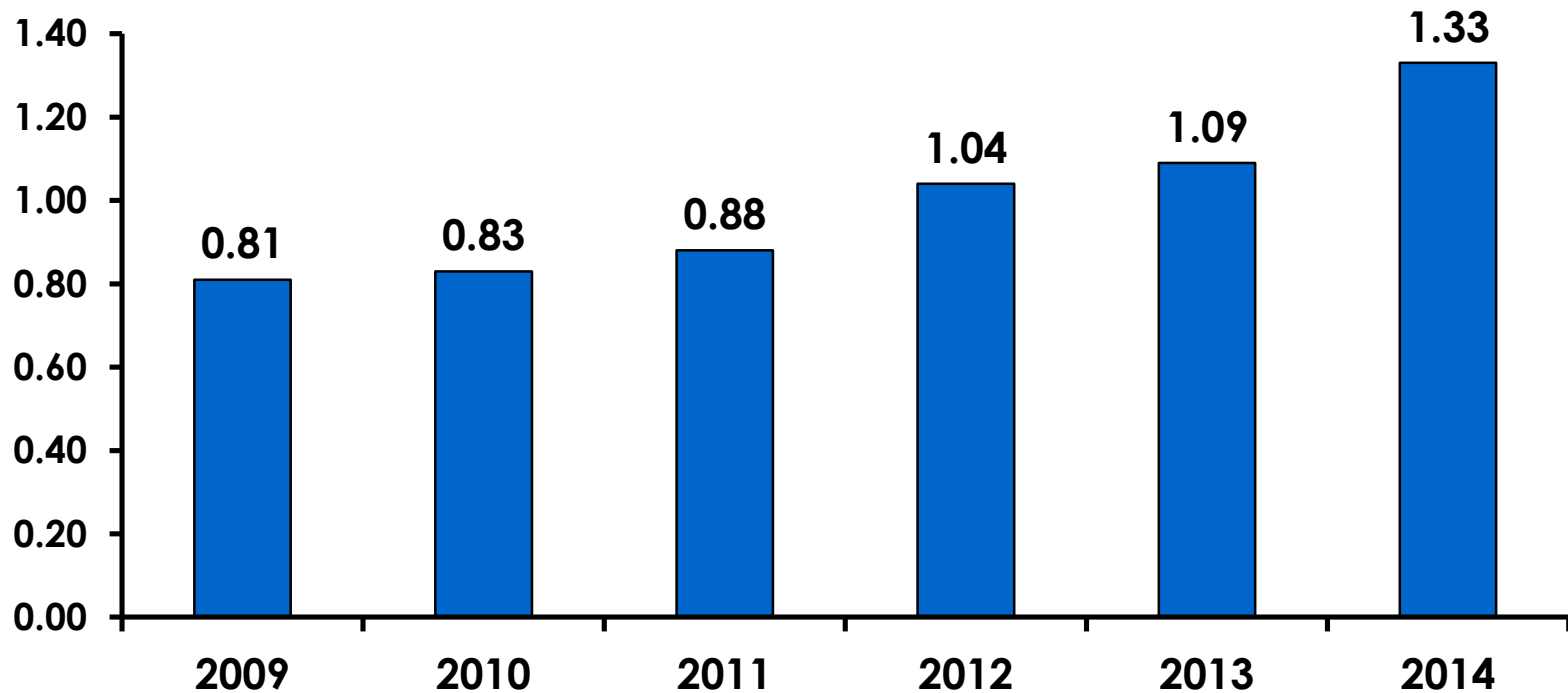
# Repeat Visitors Last Trip

n = 26



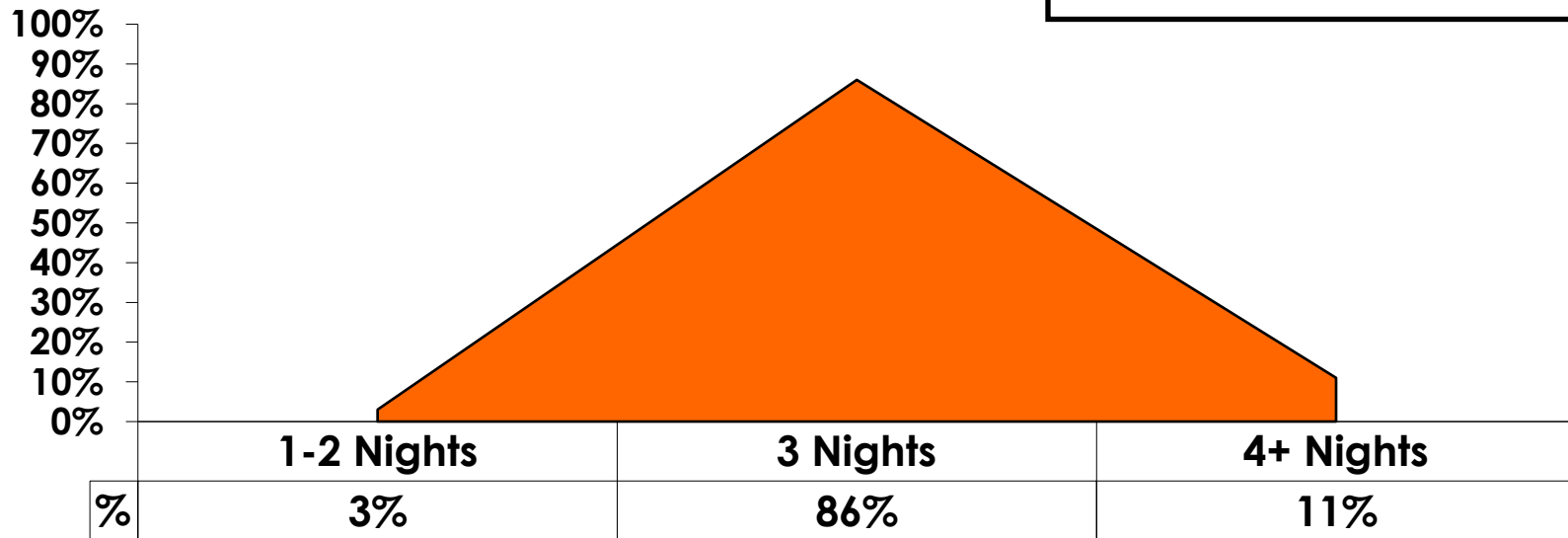
- The average repeat visitor has been to Guam 2.00 times.

# Average Number Overnight Trips (2009-2014) (2 nights or more)

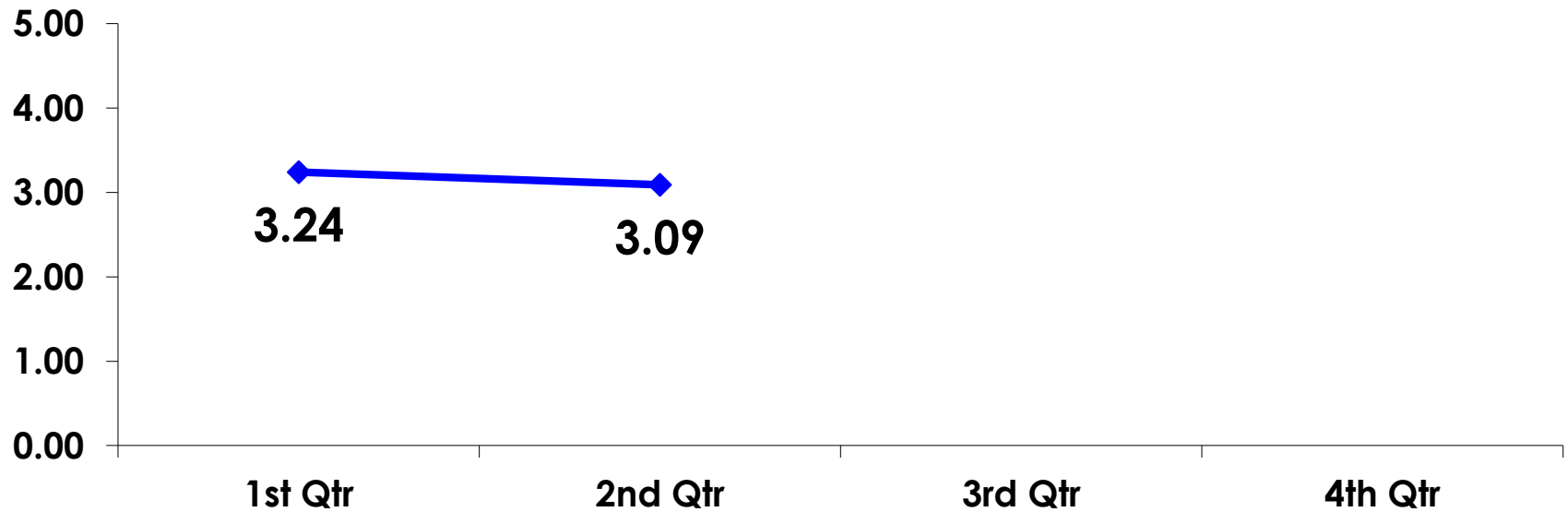


# Length of Stay

Mean = 3.09 Days  
Median = 3.0 Days



# AVG LENGTH OF STAY

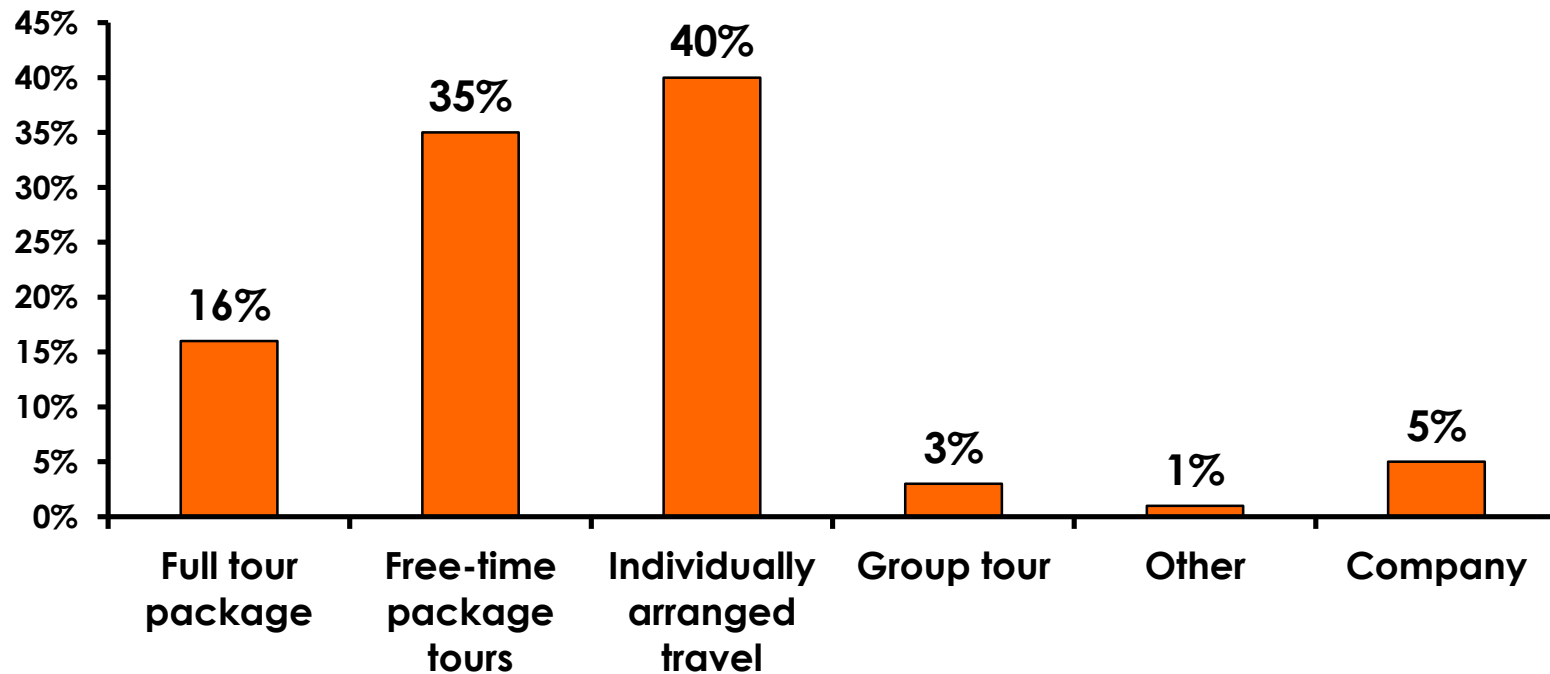


# Occupation by Income

		TOTAL	Q26								
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income	
Q25	Company: Office non-mgr	46%	50%	43%	50%	50%	45%	63%	31%		
	Company: Salesperson	16%	17%	14%	21%	17%	18%	13%	8%		
	Prof-specialist	9%				13%	15%				
	Other	7%		14%	14%	3%		13%	31%		
	Skilled worker	6%			7%	7%	12%				
	Student	5%	17%			3%	3%		8%	100%	
	Freelancer	4%		29%	7%	3%	3%				
	Retired	2%	17%						8%		
	Govt- Mgr/ Exec	2%				3%			8%		
	Govt- Office non-mgr	2%					3%		8%		
	Govt- Executive	1%						13%			
	Total	Count	128	6	7	14	30	33	8	13	1

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



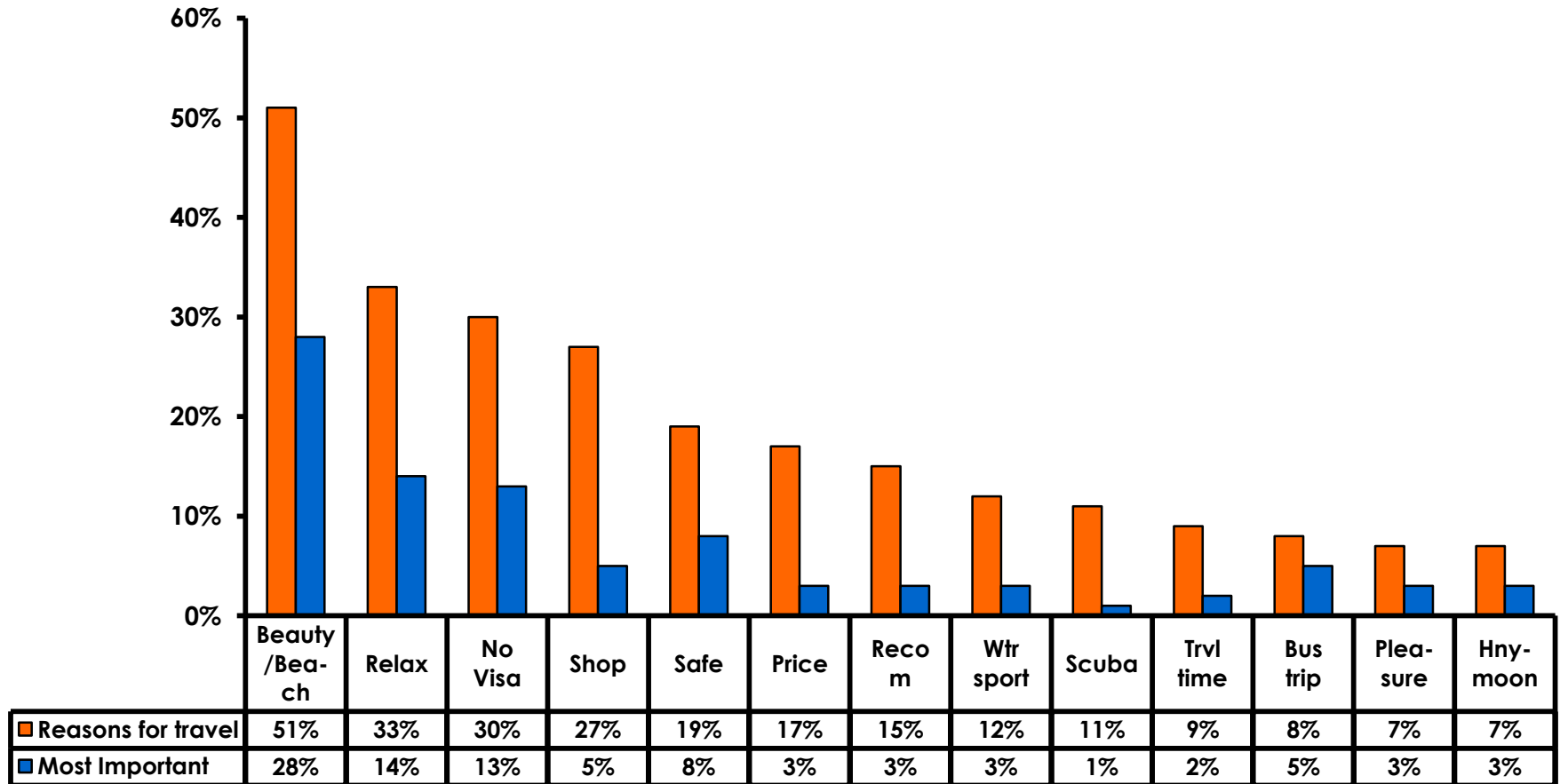
# Accommodation by Income

Average length of stay: 3.09 days

		TOTAL	Q26								
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income	
Q9	Hilton Guam Resort	13%			7%	21%	9%	13%		100%	
	Hotel Nikko Guam	13%		14%		14%	21%	13%	8%		
	Westin Resort Guam	11%	33%		7%	7%	15%	13%	15%		
	PIC Club	11%		29%		17%	9%	13%			
	Royal Orchid Guam	9%	33%			3%	9%	13%	31%		
	Verona Resort & Spa	9%		14%	36%	14%	3%		15%		
	Hyatt Regency Guam	6%				3%	12%		15%		
	Fiesta Resort Guam	5%		29%	7%	3%	9%				
	Outrigger Guam Resort	5%	17%	14%		7%		13%			
	Holiday Resort Guam	5%	17%		7%			13%	8%		
	Sheraton Laguna Guam	3%			7%		3%				
	Guam Marriott Resort	2%				3%	3%		8%		
	Bayview Hotel	1%				7%					
	Other	1%			7%						
	Hotel Santa Fe	1%					3%				
	Tumon Bay Capital Hotel	1%			7%						
	Home stay/ friend/ relative	1%			7%						
	Apartment	1%					3%				
	Condo	1%									
	Guam Plaza Hotel	1%			7%						
	Oceanview Hotel	1%									
	Guam Reef & Olive Spa	1%									
	Leo Palace Resort	1%						13%			
	Total	Count	149	6	7	14	29	33	8	13	1



# Travel Motivation - Top Responses



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# Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
  - Relaxation and
  - No visa requirement
- 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	51%	75%	60%	23%	20%	45%	58%	
	Relax	33%	25%	38%	26%		33%	32%	
	No Visa requirement	30%	33%	31%	29%	20%	28%	32%	
	Shopping	27%	42%	30%	14%	20%	23%	31%	
	Safe	19%	33%	21%	9%	20%	18%	20%	
	Price	17%		20%	14%	20%	14%	20%	
	Recomm- friend/family/trvl agnt	15%	8%	18%	11%	20%	12%	20%	
	Water sports	12%	50%	11%	3%		14%	10%	
	Scuba	11%	33%	9%	9%		12%	10%	
	Short travel time	9%	17%	10%	3%		13%	4%	
	Company/ Business Trip	8%		4%	17%	40%	8%	8%	
	Pleasure	7%	33%	6%	3%		5%	10%	
	Honeymoon	7%		11%			13%	1%	
	Golf	6%		4%	11%	20%	8%	4%	
	Previous trip	4%		5%		20%	5%	3%	
	Visit friends/ Relatives	3%		3%	3%		3%	3%	
	Other	2%		3%			1%	3%	
	Convention/ Trade/ Conference	2%			9%		3%	1%	
	Married/ Attn wedding	1%		1%	3%		3%		
	Company Sponsored	1%		1%	3%		1%	1%	
	Total	Count	149	12	97	35	5	78	71

# Motivation by Income

		TOTAL	Q26								
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income	
Q5A	Natural beauty	51%	67%	100%	79%	48%	45%	63%	69%		
	Relax	33%	33%	71%	21%	45%	33%	38%	46%		
	No Visa requirement	30%	17%	57%	43%	17%	42%	25%	38%	100%	
	Shopping	27%	50%	43%	50%	24%	24%	13%	54%		
	Safe	19%	33%	43%	29%	17%	18%	13%	15%		
	Price	17%	33%	29%	29%	7%	21%	13%	38%		
	Recomm- friend/family/trv agnt	15%		14%	29%	21%	15%	25%	31%		
	Water sports	12%	17%	29%	21%	14%	9%	25%	15%		
	Scuba	11%		43%	7%	17%	6%	25%	15%		
	Short travel time	9%		29%	7%	7%	9%	13%	15%		
	Company/ Business Trip	8%	17%		7%	7%	3%		15%	100%	
	Pleasure	7%			29%	10%	9%		8%		
	Honeymoon	7%		29%	7%	14%	6%	25%			
	Golf	6%				7%	6%	13%			
	Previous trip	4%	17%	14%	7%	3%			15%		
	Visit friends/ Relatives	3%				3%		13%	15%		
	Other	2%					3%	13%	8%		
	Convention/ Trade/ Conference	2%				3%					
	Married/ Attn wedding	1%					3%	13%			
	Company Sponsored	1%					3%				
	Total	Count	149	6	7	14	29	33	8	13	1

# SECTION 3 **EXPENDITURES**

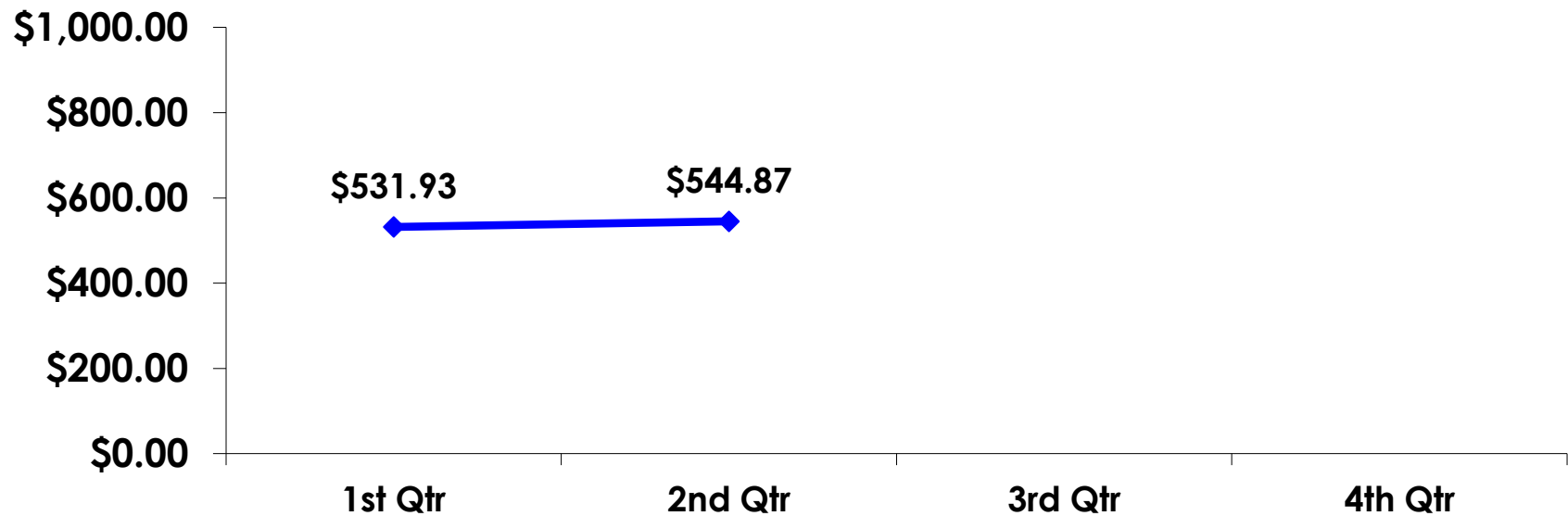
# Prepaid Expenditures

TWD 30.27/US\$1

- \$742.25 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$5,019 = maximum (highest amount recorded for the entire sample)
- \$544.87 = overall mean average per person prepaid expenditures

# PREPAID EXPENDITURES

## Per Person



YTD=\$538.40

# Breakdown of Prepaid Expenditures

## TWD 30.27=\$1

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

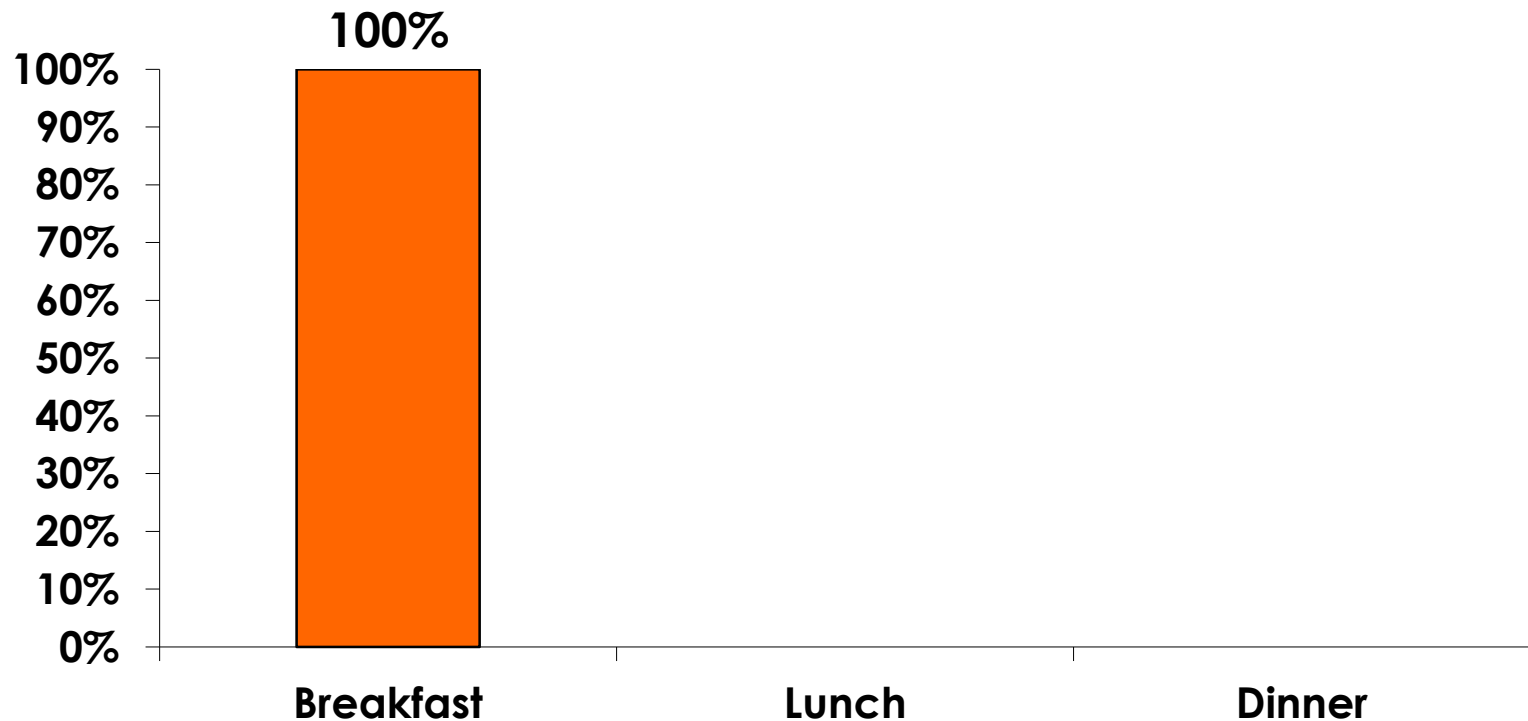
	MEAN \$
Air & Accommodation package only	\$727.22
Air & Accommodation w/ daily meal package	\$1,254.09
Air only	\$594.65
Accommodation only	\$-
Accommodation w/ daily meal only	\$991.08
Food & Beverages in Hotel	\$49.55
Ground transportation – Taiwan	\$70.52
Ground transportation – Guam	\$67.49
Optional tours/ activities	\$418.90
Other expenses	\$609.56
<b>Total Prepaid</b>	<b>\$742.25</b>



# PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n= 1

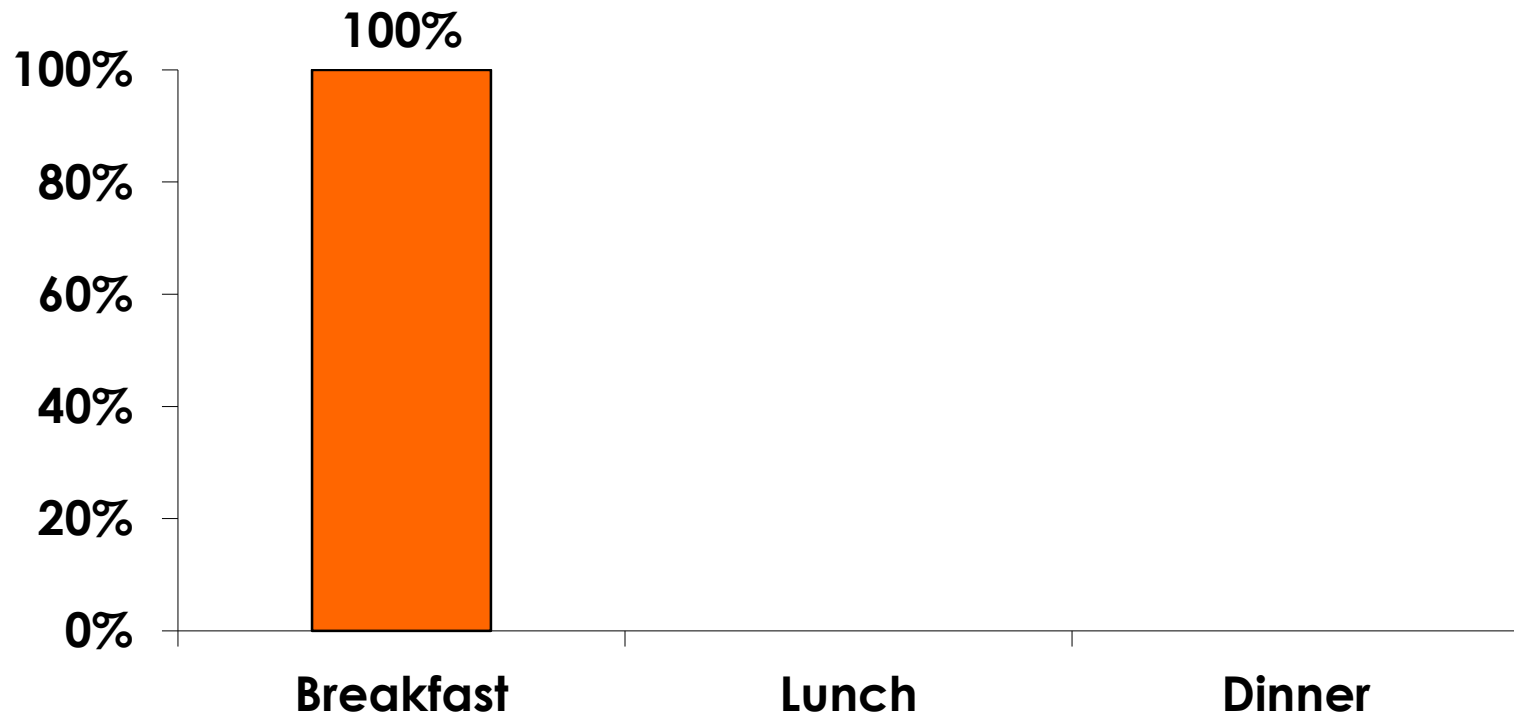


Mean=\$1,254.09 per travel party

# PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

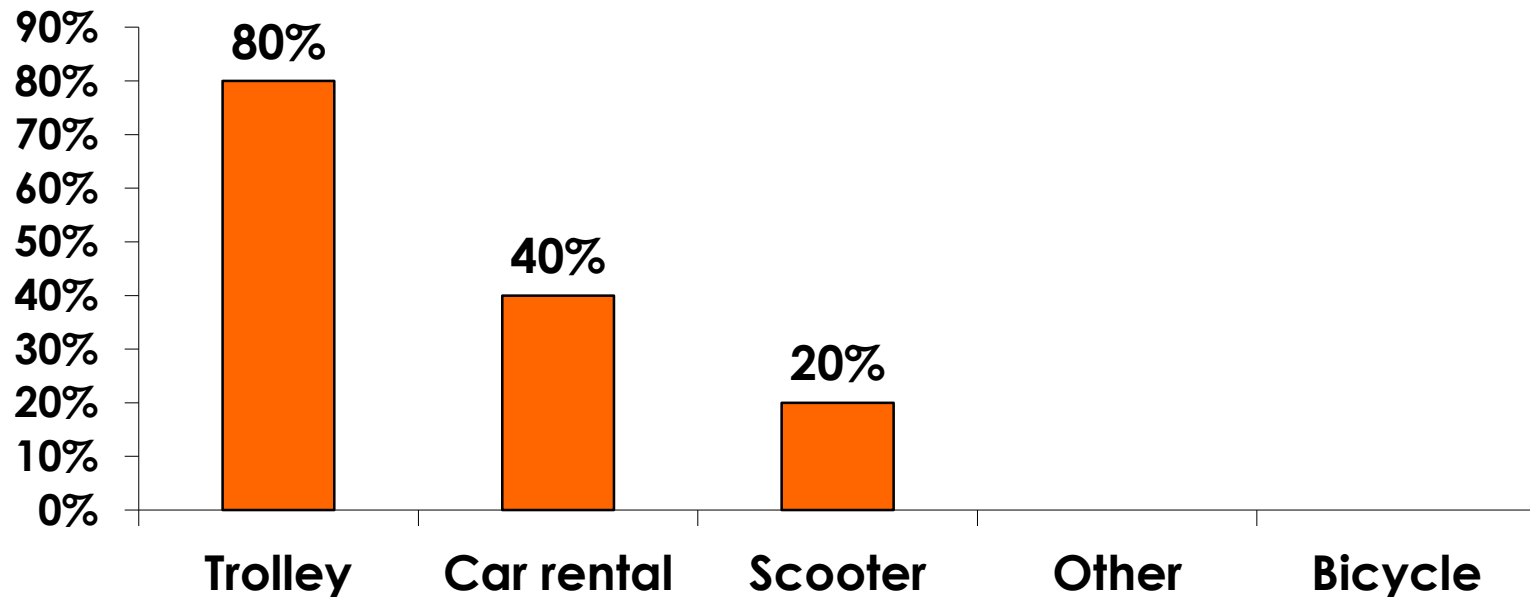
n=1



Mean=\$991.08 per travel party

# PREPAID GROUND TRANSPORTATION

n=5



Mean=\$67.49 per travel party

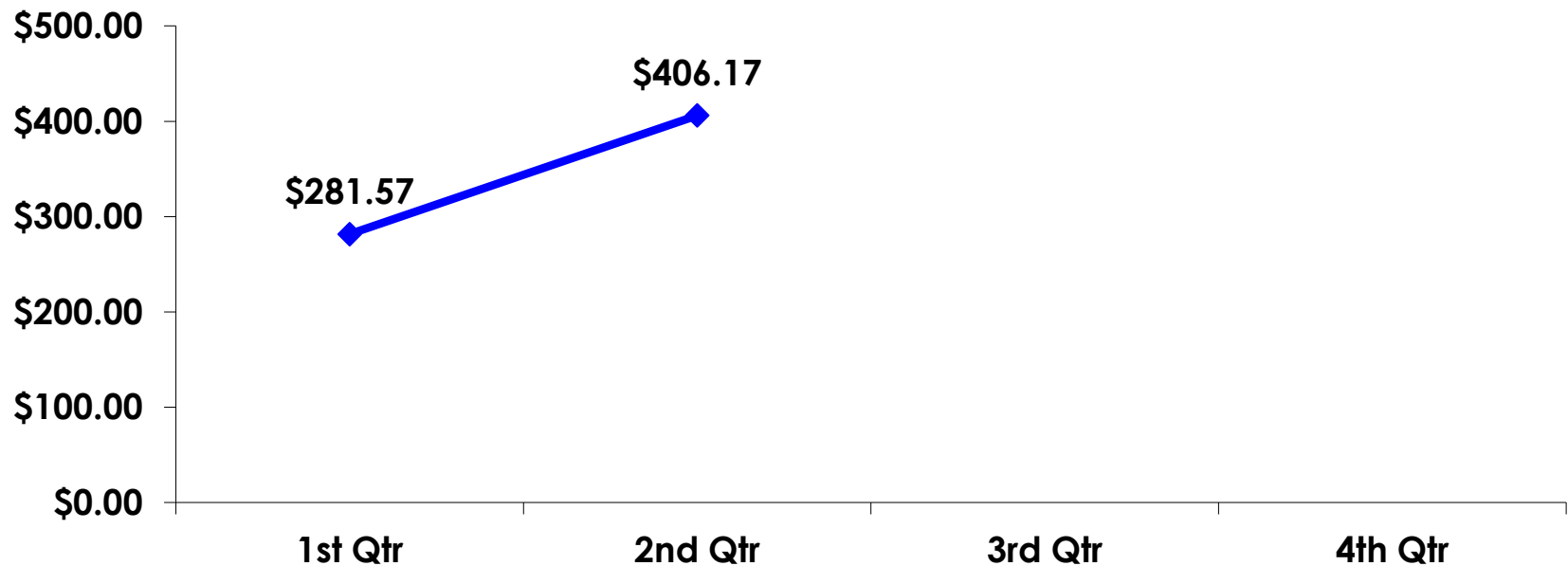
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# On-Island Expenditures

- \$503.95 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,700 = Maximum (highest amount recorded for the entire sample)
- \$406.17 = overall mean average per person on-island expenditure

# ON-ISLAND EXPENDITURES

## Per Person

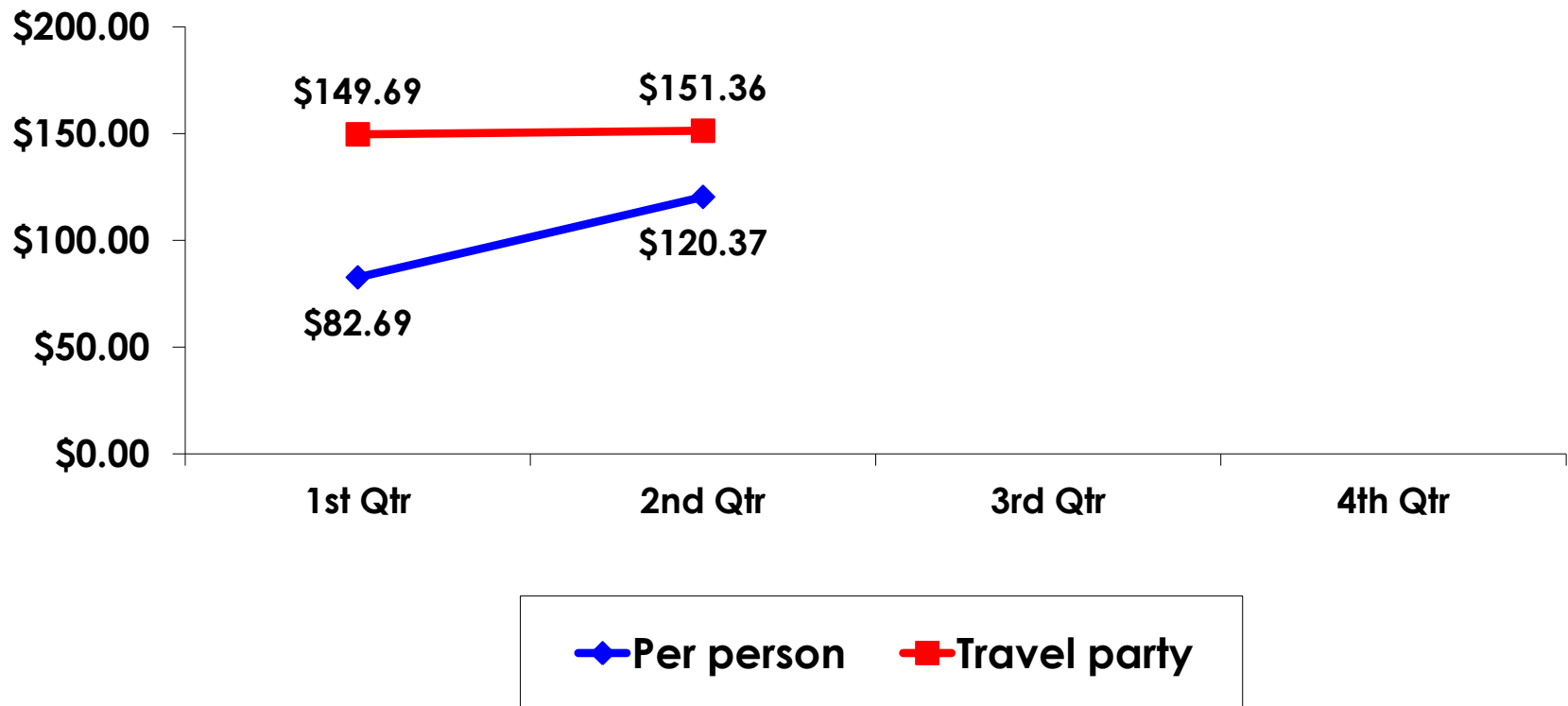


YTD = \$343.87

# ON-ISLE EXPENDITURES – Per Day

Per Person YTD = \$101.47

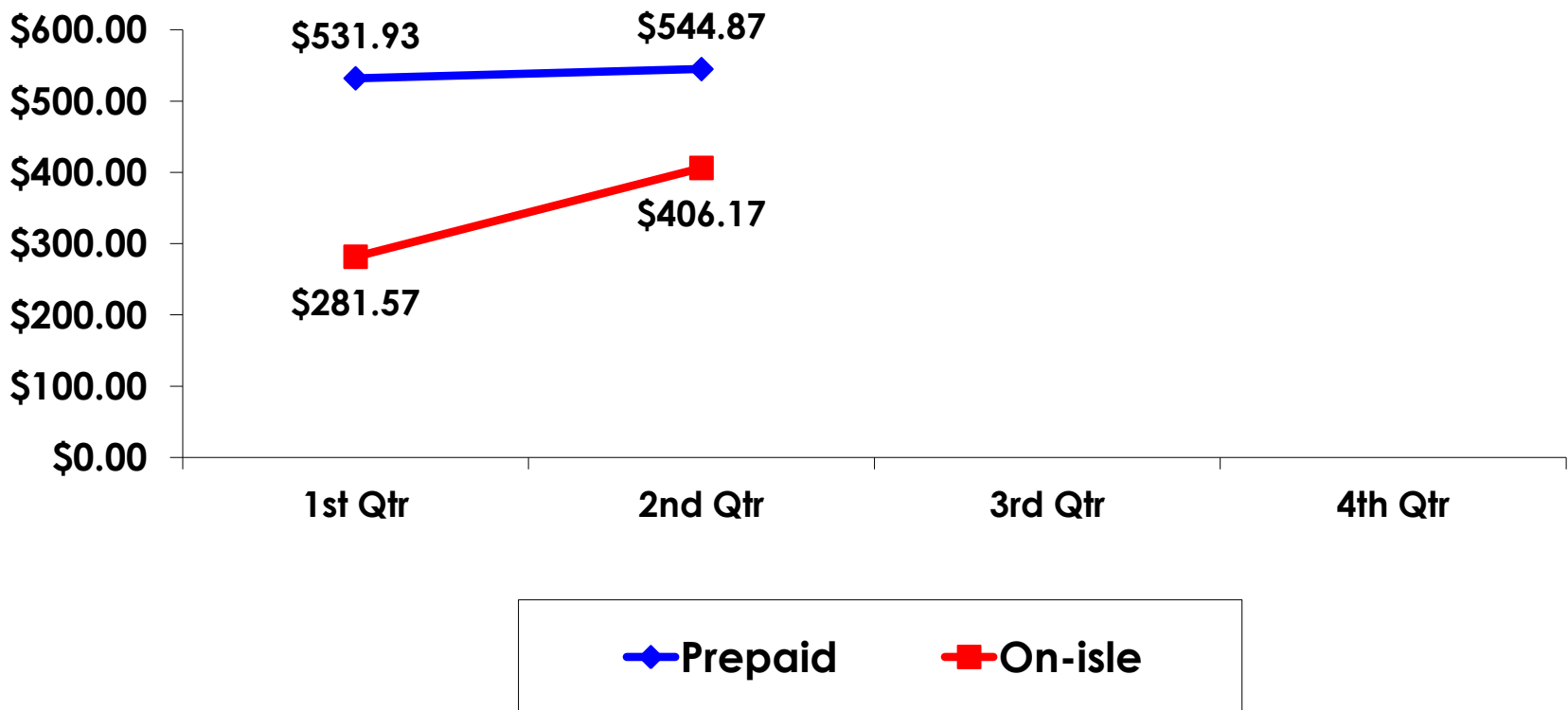
Travel Party YTD = \$150.52



# PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$538.40

On-Isle YTD = \$343.87



# 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	\$406.17	\$466.28	\$341.06	\$203.33	\$502.91	\$352.07	\$1,156.00	\$284.29	\$386.35	\$196.07	\$445.00
	Median	\$222	\$190	\$300	\$167	\$300	\$0	\$668	\$330	\$310	\$0	\$445
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$200
	Maximum	\$5,700	\$5,700	\$2,266	\$500	\$2,000	\$5,700	\$2,800	\$700	\$2,266	\$761	\$690



# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$37.44	\$61.90	\$10.94	\$0.00	\$35.65	\$41.39	\$133.60
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$29.42	\$34.15	\$24.29	\$19.75	\$29.89	\$21.03	\$104.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$29.94	\$37.10	\$22.18	\$25.33	\$29.58	\$29.67	\$50.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$39.21	\$45.90	\$31.96	\$71.67	\$34.78	\$37.42	\$60.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$117.97	\$131.26	\$103.57	\$53.75	\$115.52	\$107.08	\$398.00
	Median	\$0	\$0	\$0	\$20	\$0	\$0	\$200
GIFT- OTHER	Mean	\$58.77	\$40.64	\$78.42	\$58.50	\$69.98	\$29.61	\$52.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TRANS	Mean	\$11.34	\$12.87	\$9.69	\$3.50	\$11.35	\$15.53	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$180.25	\$188.03	\$171.83	\$58.33	\$246.78	\$37.22	\$212.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$150
TOTAL	Mean	\$503.95	\$551.08	\$452.88	\$290.83	\$572.91	\$318.94	\$1,009.60
	Median	\$295	\$218	\$305	\$315	\$400	\$0	\$668

# On-Island Expenditures

## First Timers & Repeaters

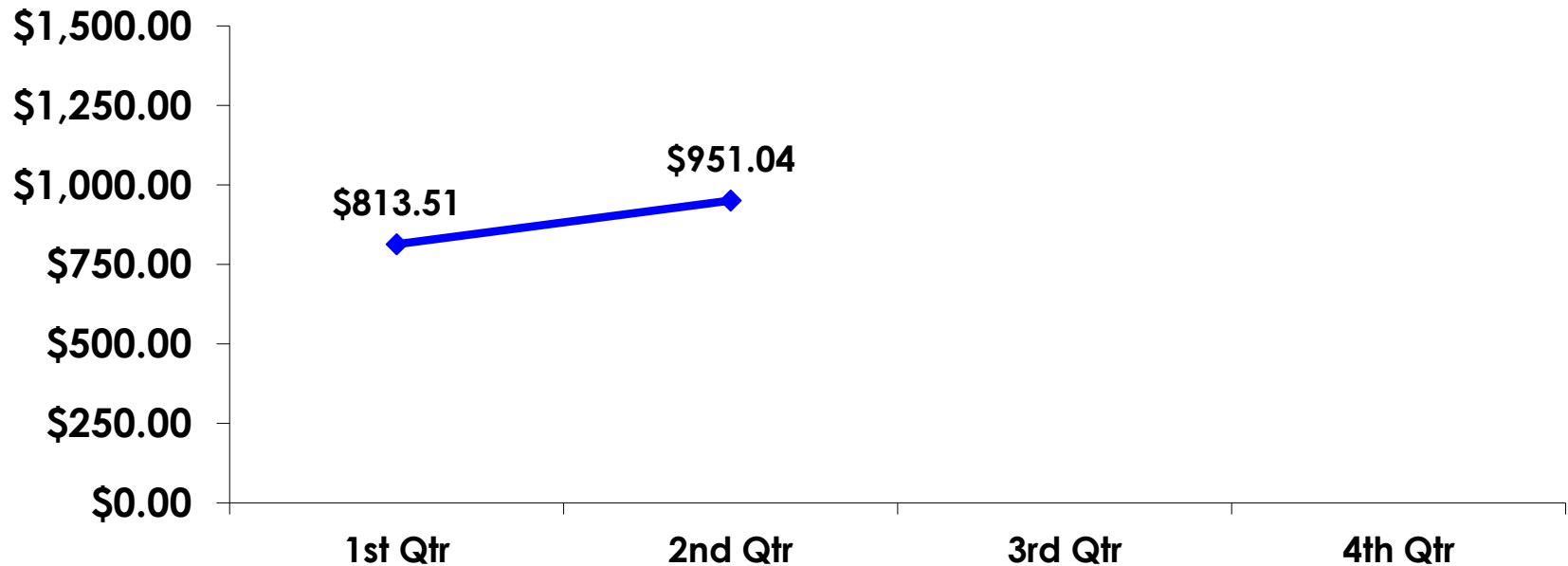
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$37.44	\$14.50	\$146.85
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$29.42	\$24.30	\$53.85
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$29.94	\$24.77	\$54.62
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$39.21	\$34.12	\$63.46
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$117.97	\$105.63	\$176.81
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$58.77	\$59.81	\$53.85
	Median	\$0	\$0	\$0
TRANS	Mean	\$11.34	\$10.74	\$14.23
	Median	\$0	\$0	\$0
OTHER	Mean	\$180.25	\$187.59	\$145.27
	Median	\$0	\$0	\$0
TOTAL	Mean	\$503.95	\$460.97	\$708.92
	Median	\$295	\$300	\$200

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

- \$951.04 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$9,004 = Maximum (highest amount recorded for the entire sample)

# TOTAL EXPENDITURES Per Person



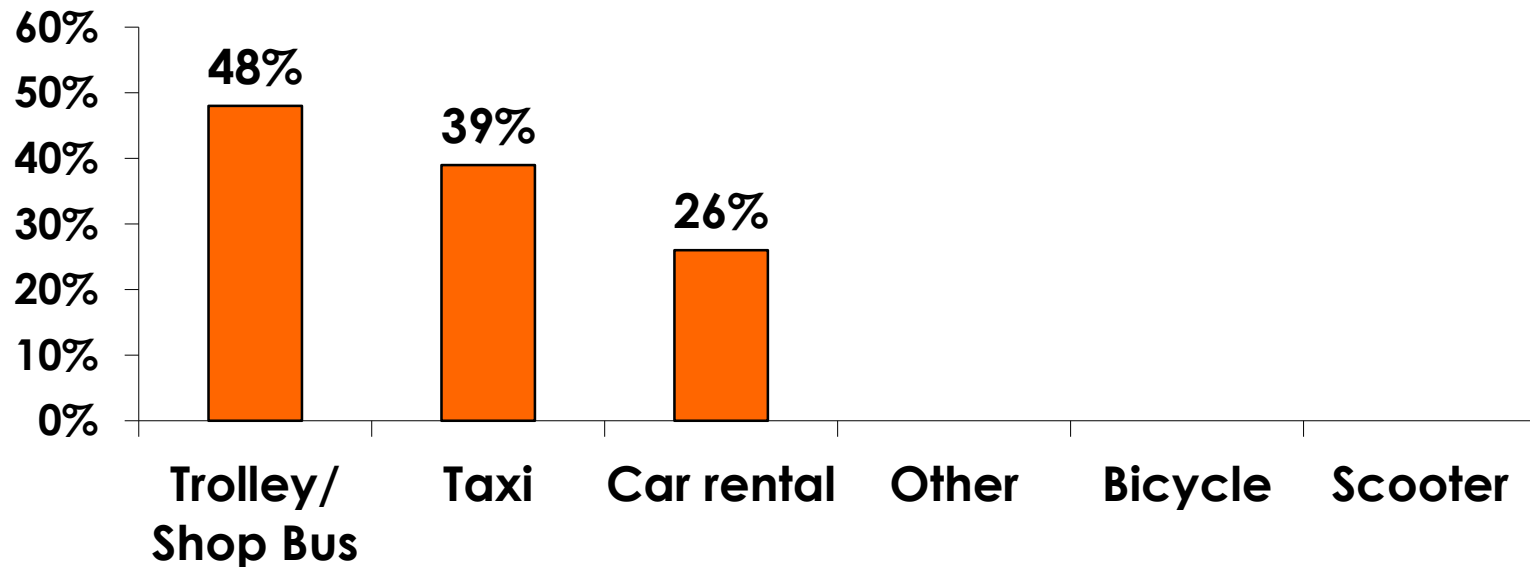
YTD=\$882.27

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$37.44
Food & beverage in fast food restaurant/convenience store	\$29.42
Food & beverage at restaurants or drinking establishments outside a hotel	\$29.94
Optional tours and activities	\$39.21
Gifts/ souvenirs for yourself/companions	\$117.97
Gifts/ souvenirs for friends/family at home	\$58.77
Local transportation	\$11.34
Other expenses not covered	\$180.25
<b>Average Total</b>	<b>\$503.95</b>

# Local Transportation

n=31



Mean=\$11.34 per travel party

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# Guam Airport Expenditures

- \$48.29 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,000 = Maximum (highest amount recorded for the entire sample)

# Breakdown of Airport Expenditures

	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	\$5.46
<b>Gifts/Souvenirs Self</b>	\$20.34
<b>Gifts/Souvenirs Others</b>	\$22.50
<b>Total</b>	<b>\$48.29</b>

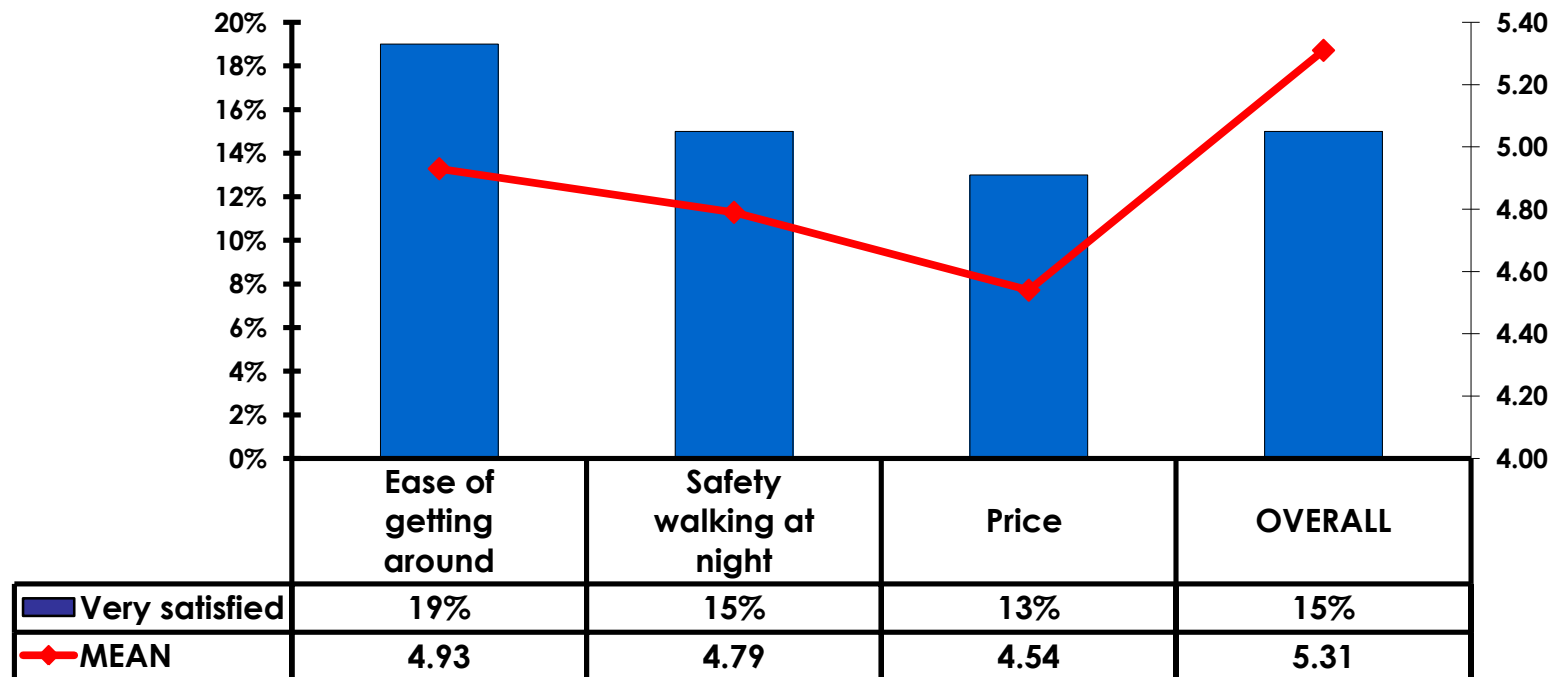


# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

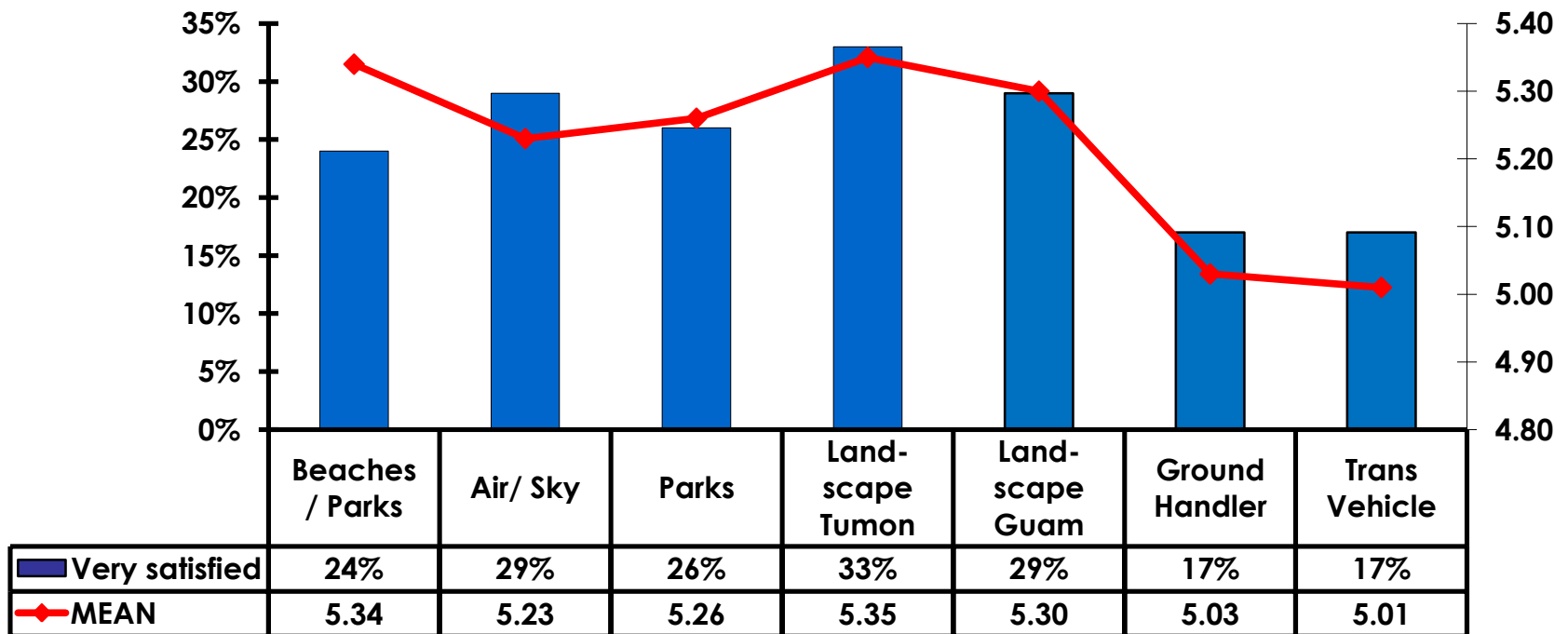
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Wedding Satisfaction Scores

7pt Rating Scale

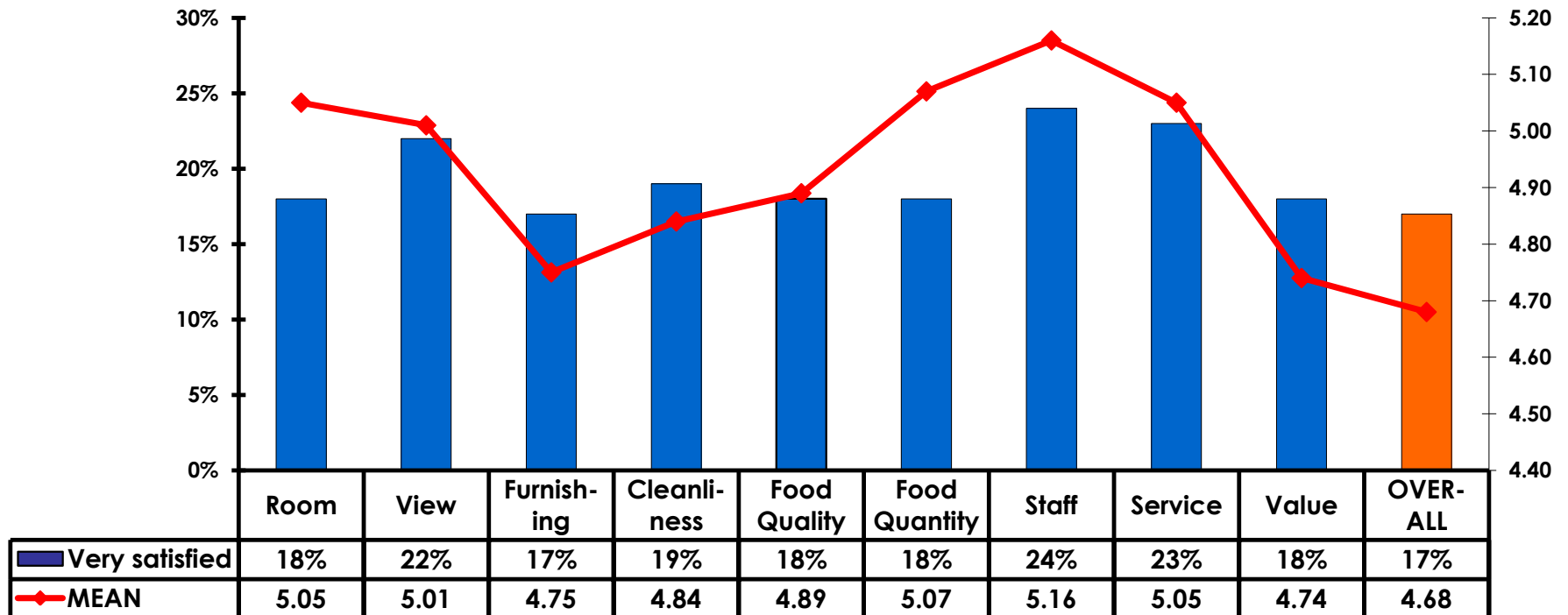
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

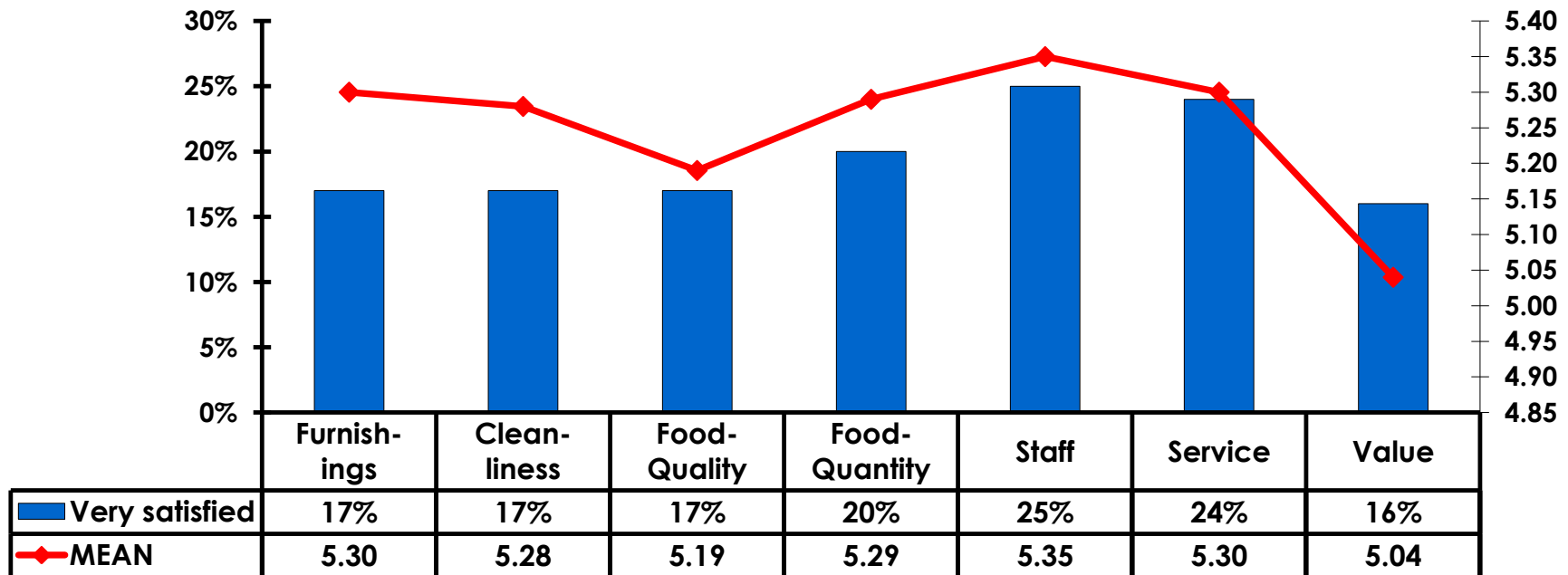
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

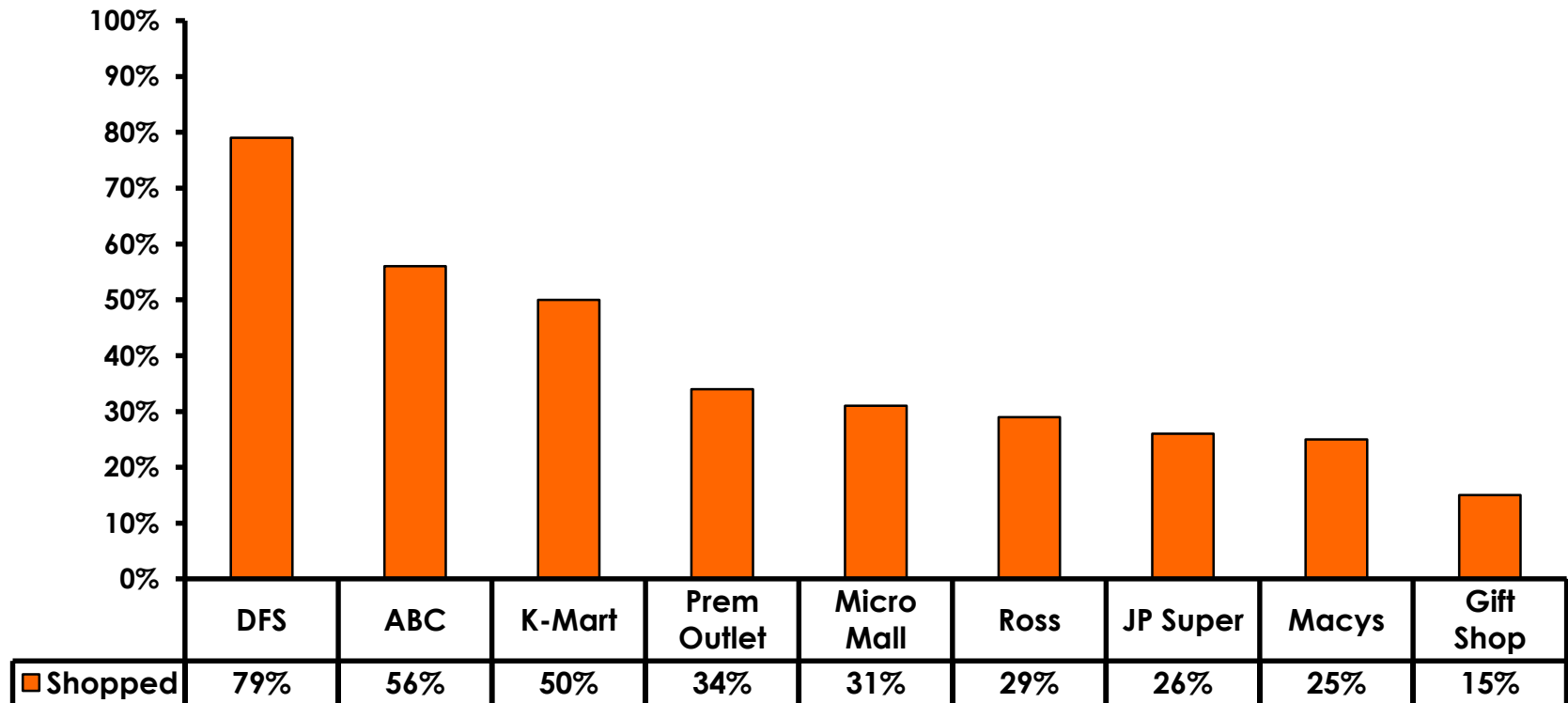
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

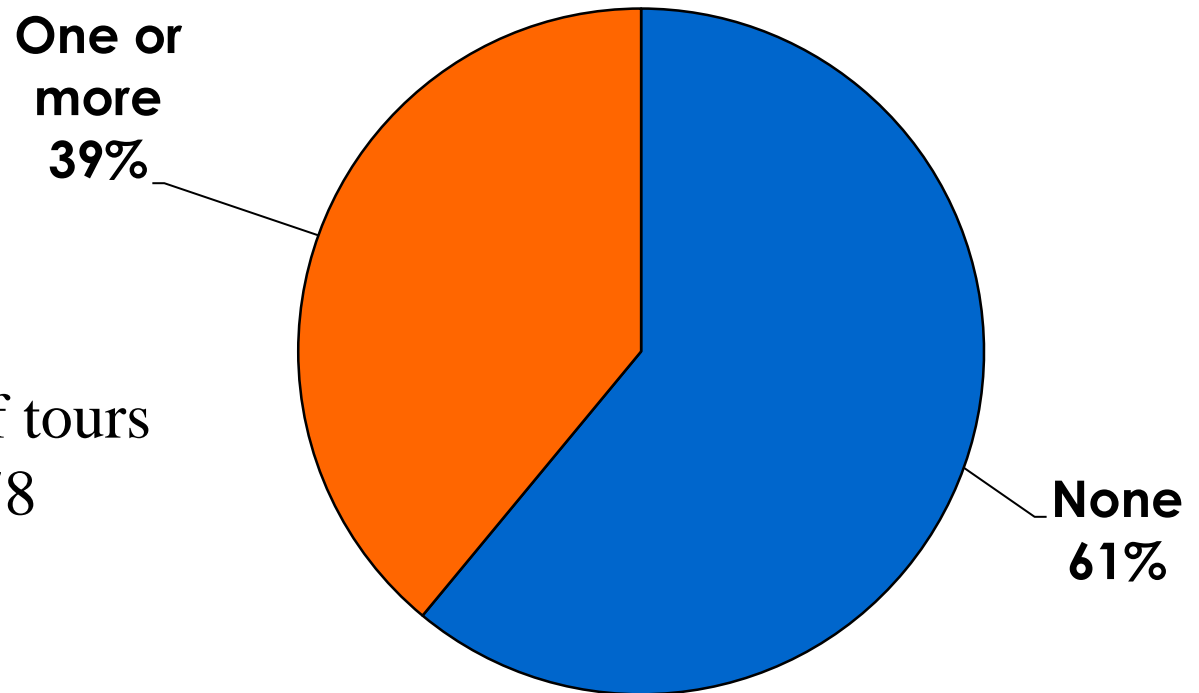
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>39%</b>	Score of 6 to 7 = <b>38%</b>
Score of 4 to 5 = <b>51%</b>	Score of 4 to 5 = <b>49%</b>
Score 1 to 3 = <b>10%</b>	Score 1 to 3 = <b>11%</b>
<b>MEAN = 5.01</b>	<b>MEAN = 4.95</b>



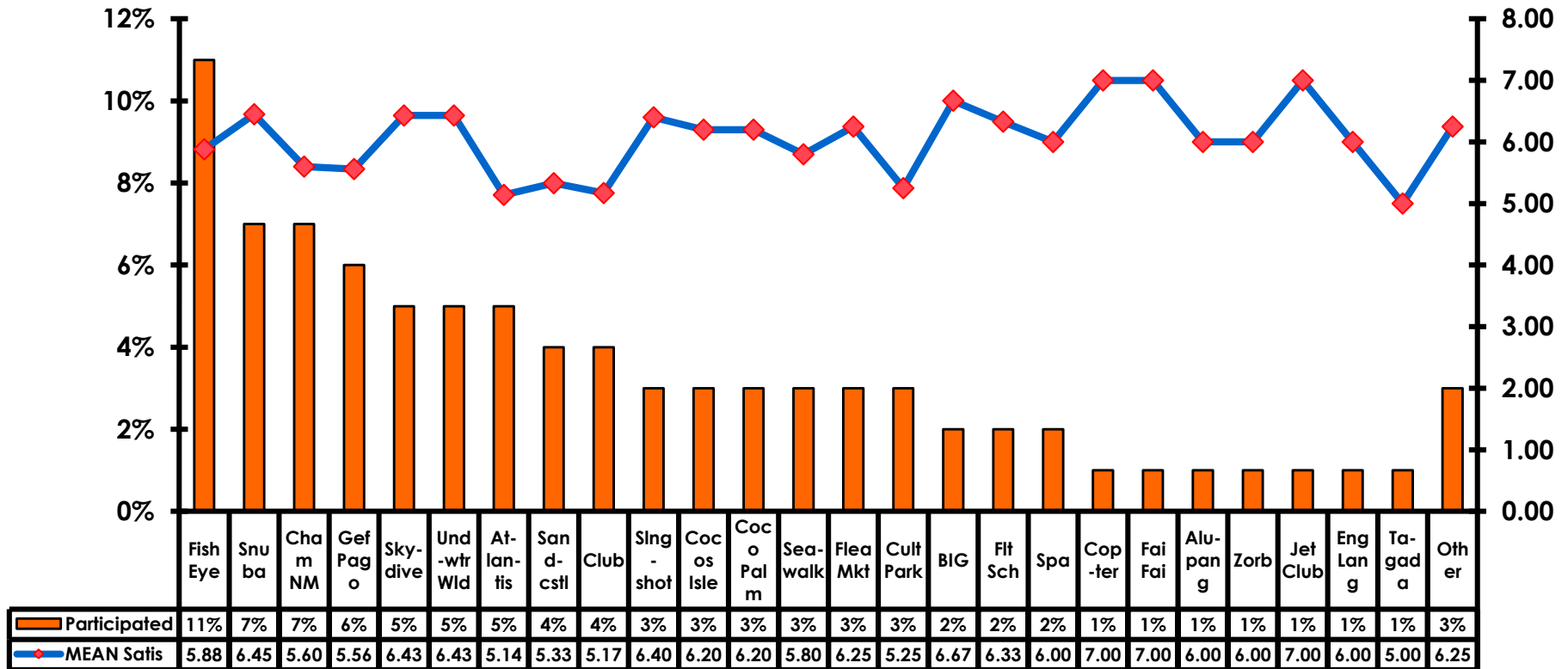
# Optional Tour Participation



- Average number of tours participated in is .78

# 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>38%</b>	Score of 6 to 7 = <b>37%</b>
Score of 4 to 5 = <b>48%</b>	Score of 4 to 5 = <b>54%</b>
Score 1 to 3 = <b>13%</b>	Score 1 to 3 = <b>8%</b>
<b>MEAN = 4.96</b>	<b>MEAN = 5.02</b>

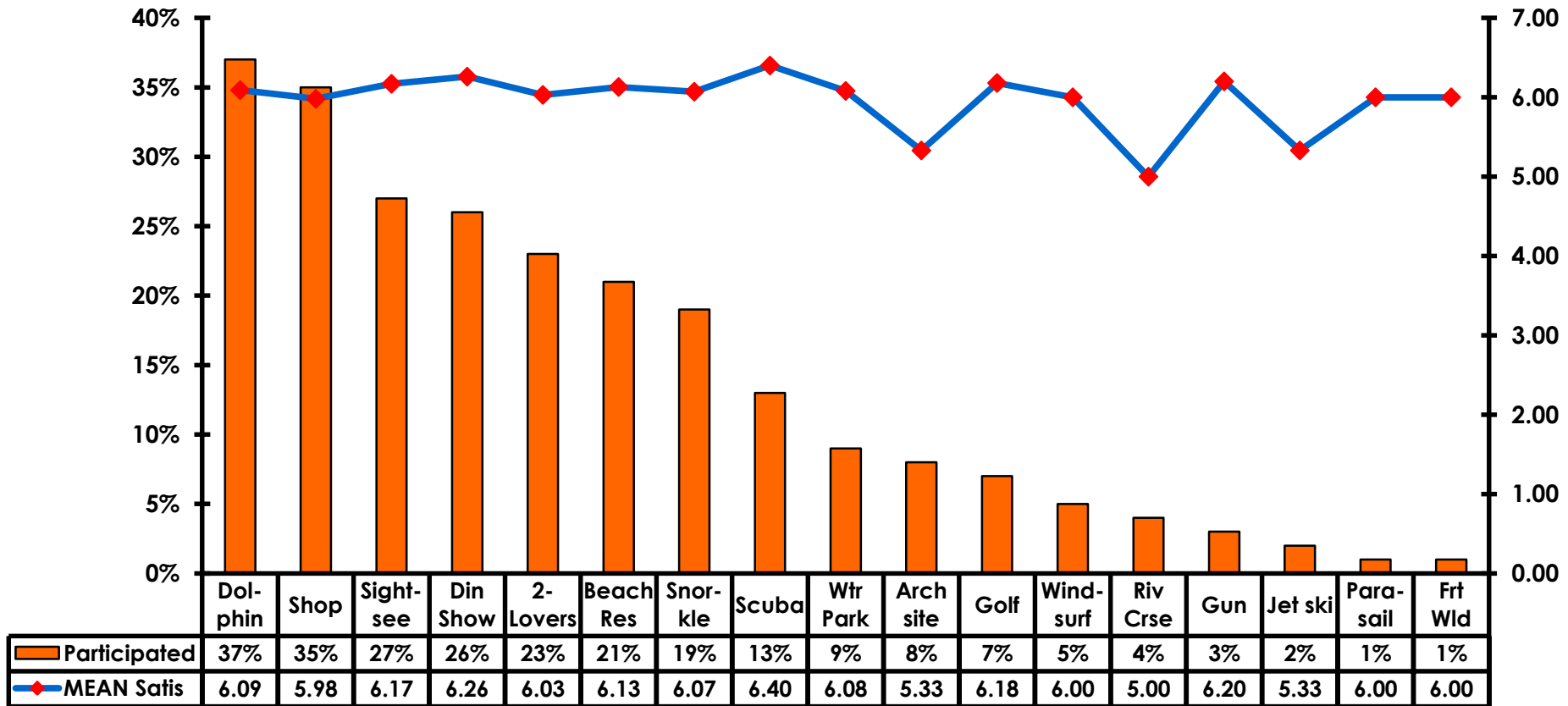
# Night Tours Satisfaction

7pt Rating Scale

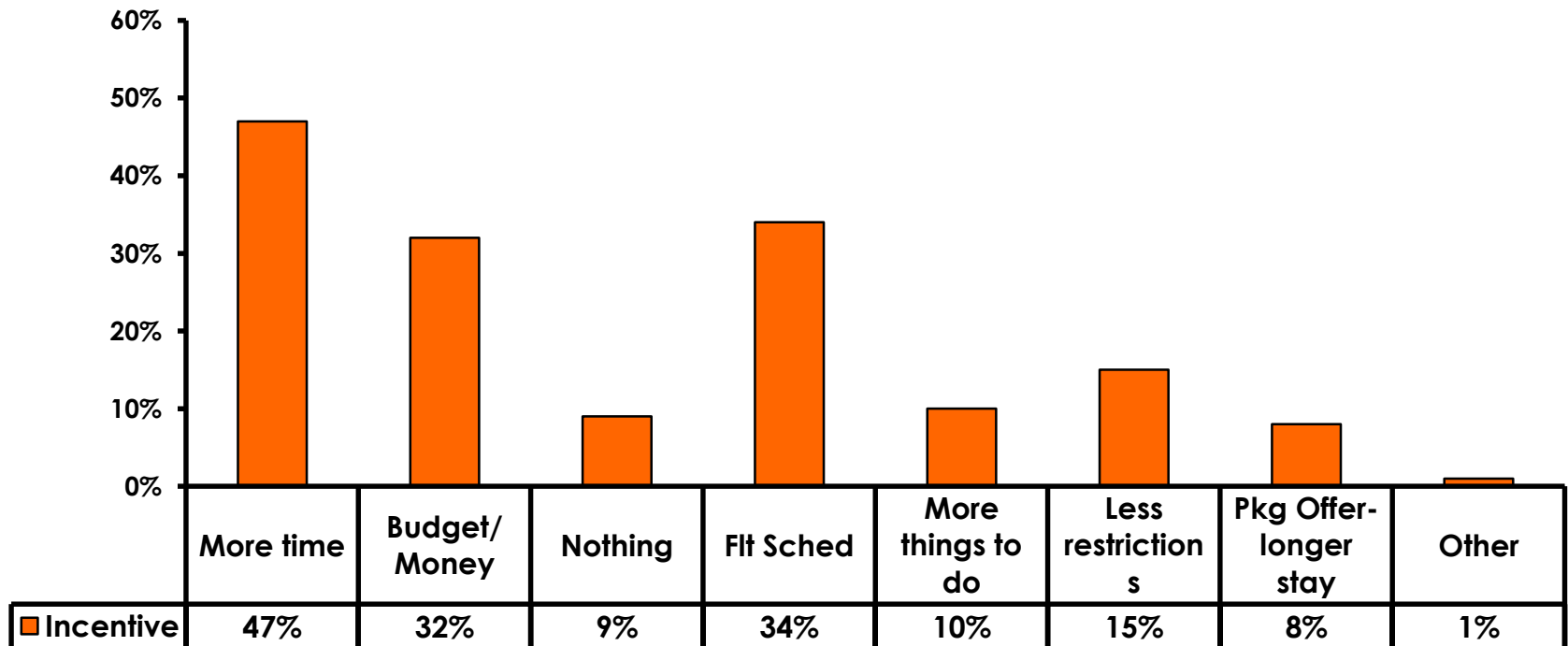
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>28%</b>	Score of 6 to 7 = <b>32%</b>
Score of 4 to 5 = <b>66%</b>	Score of 4 to 5 = <b>62%</b>
Score 1 to 3 = <b>6%</b>	Score 1 to 3 = <b>7%</b>
<b>MEAN = 4.88</b>	<b>MEAN = 4.86</b>

# Satisfaction with Other Activities



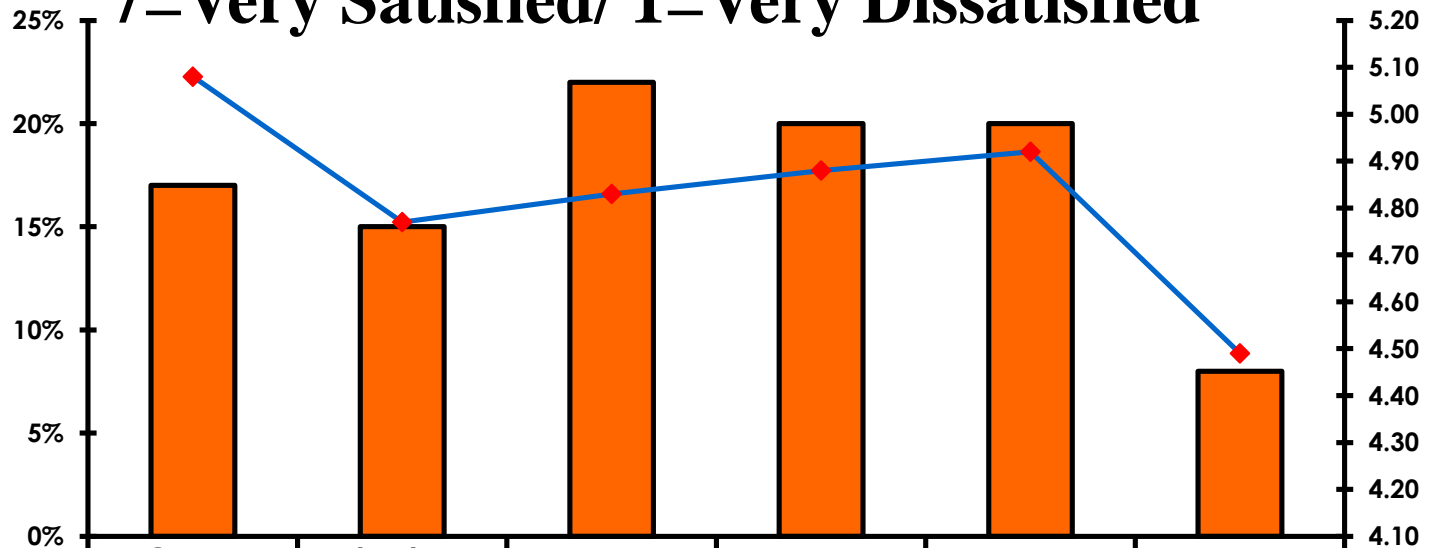
# What would it take to make you want to stay an extra day in Guam?





# On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

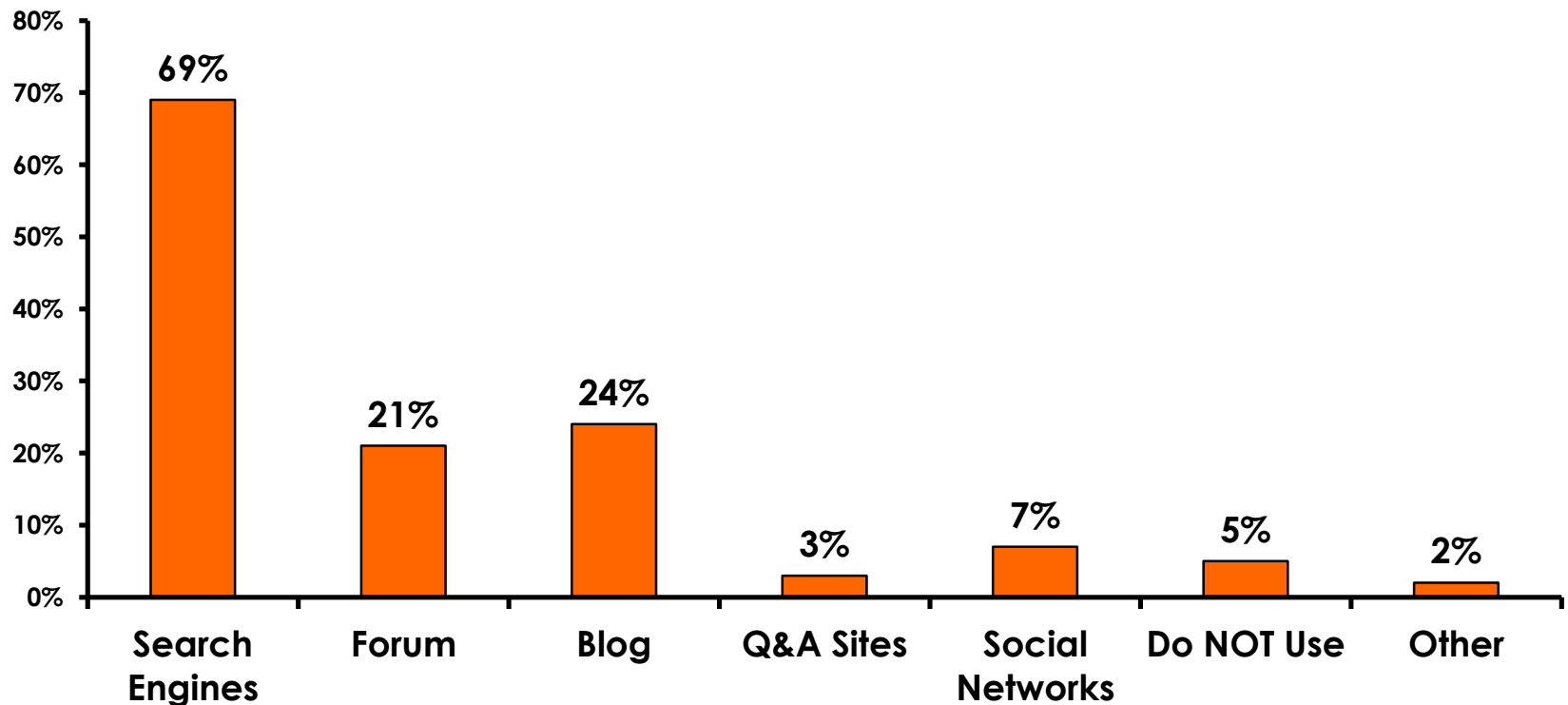


	Guam was better than expected	I had no communication problems	I will recommend Guam to friends	Sites on Guam were attractive	I plan to visit Guam again	Not enough night activities
 Strongly agree	17%	15%	22%	20%	20%	8%
 MEAN	5.08	4.77	4.83	4.88	4.92	4.49

# SECTION 5 **PROMOTIONS**

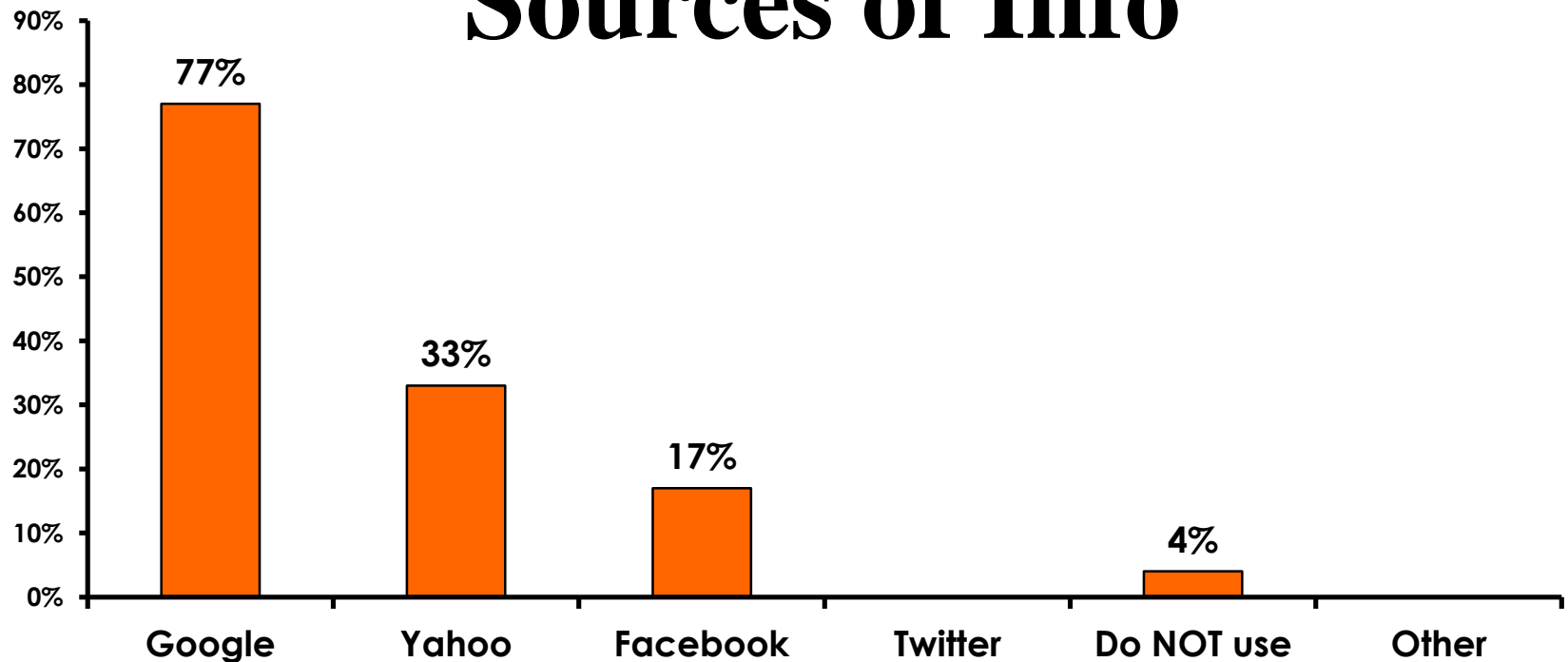


# Internet- Guam Sources of Info

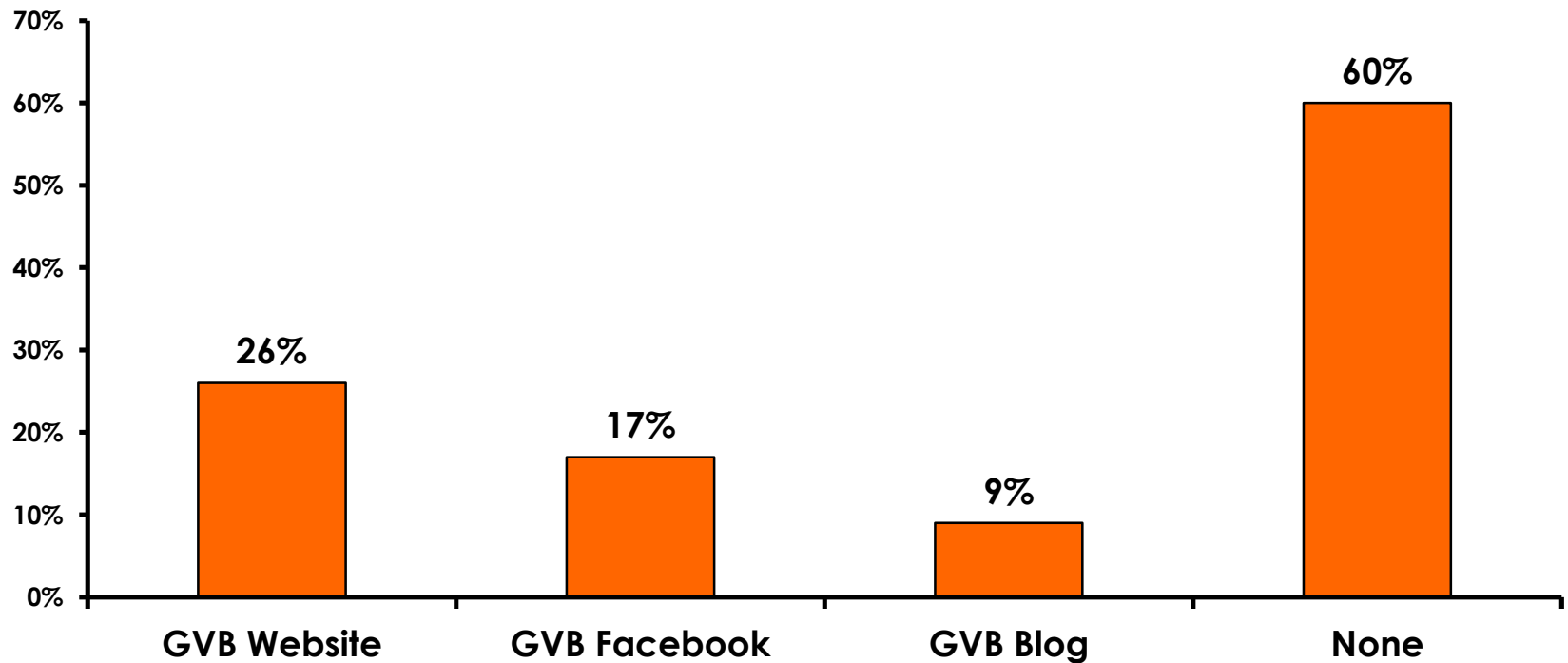


# Internet- Things To Do

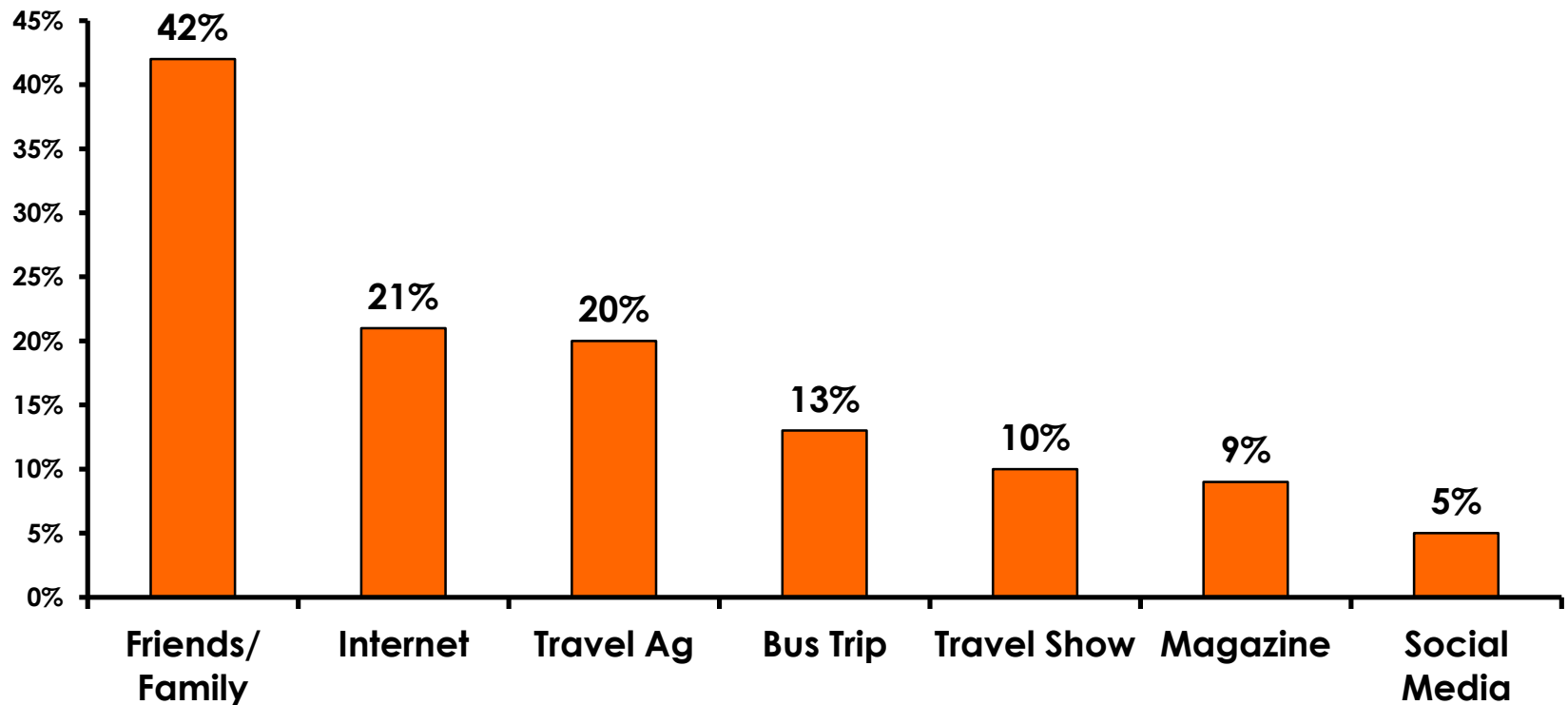
## Sources of Info



# Internet- GVB Sources

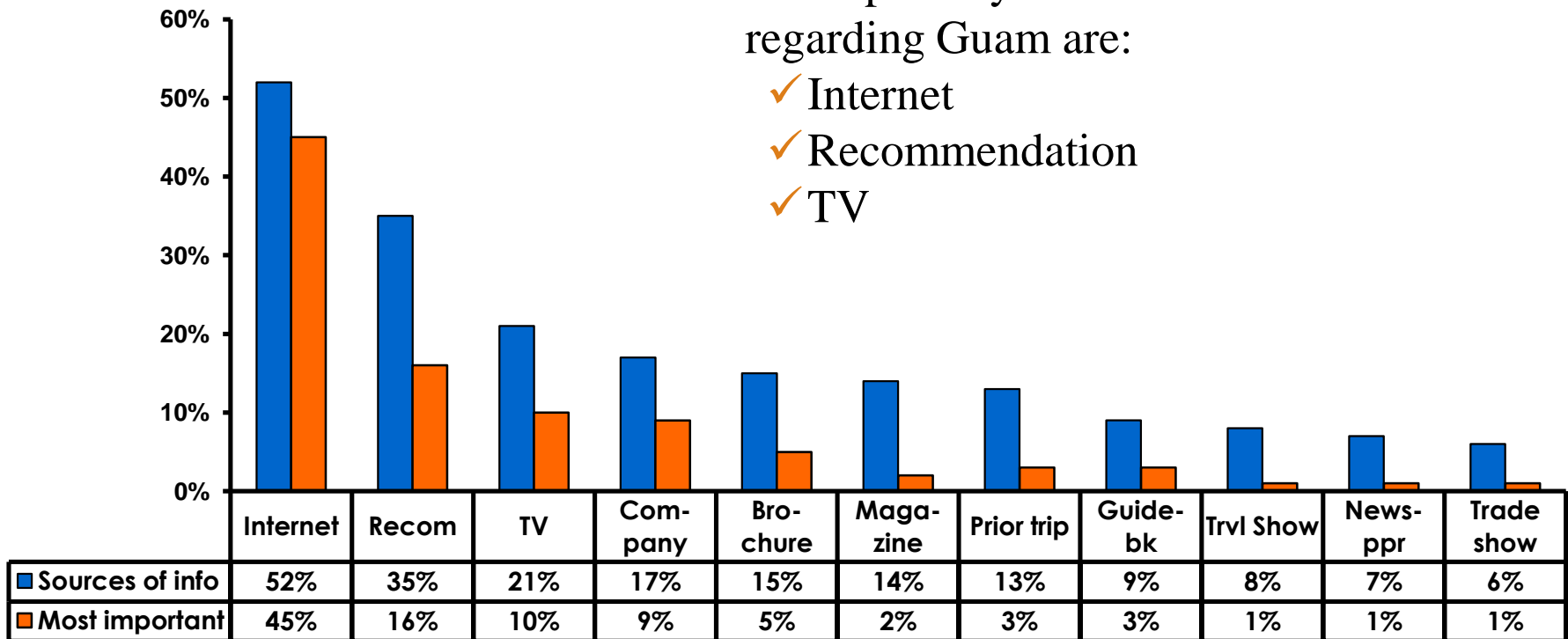


# Travel Motivation- Info Sources



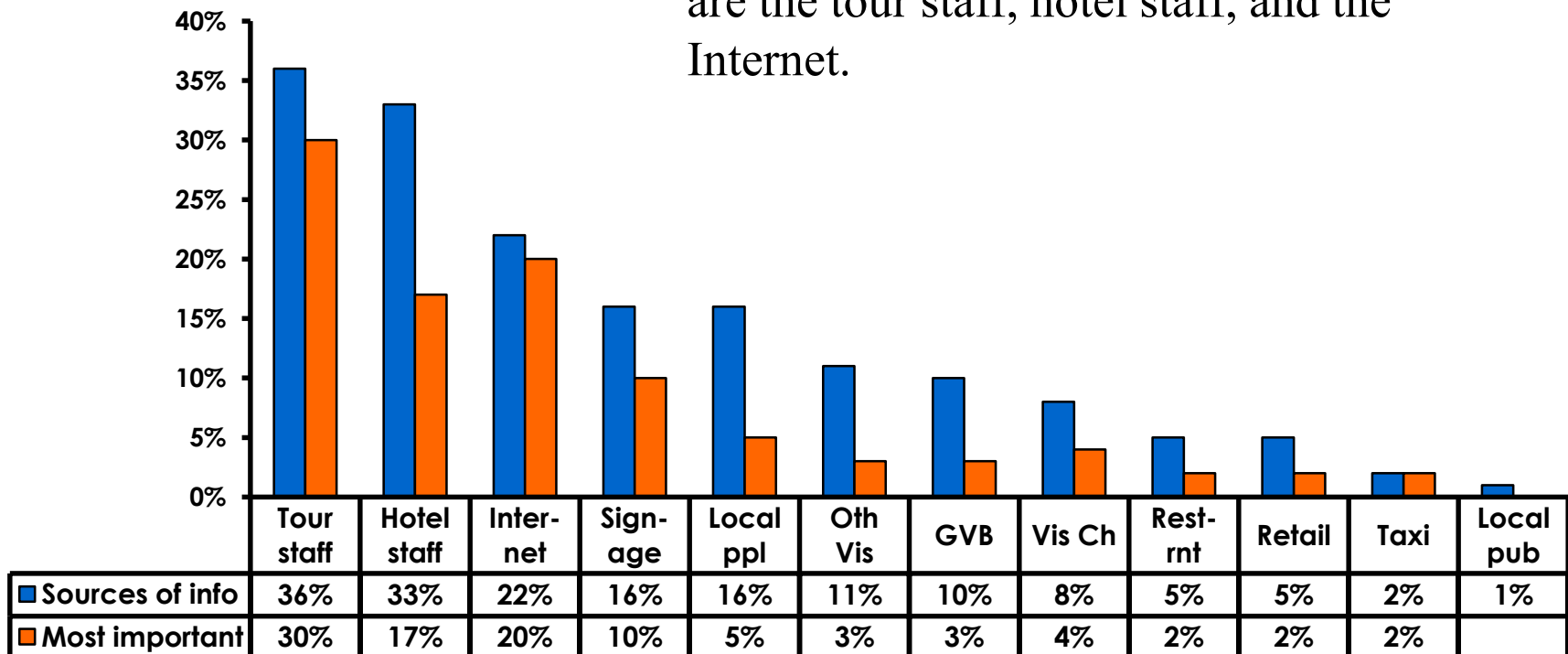
# Sources of Information Pre-arrival

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



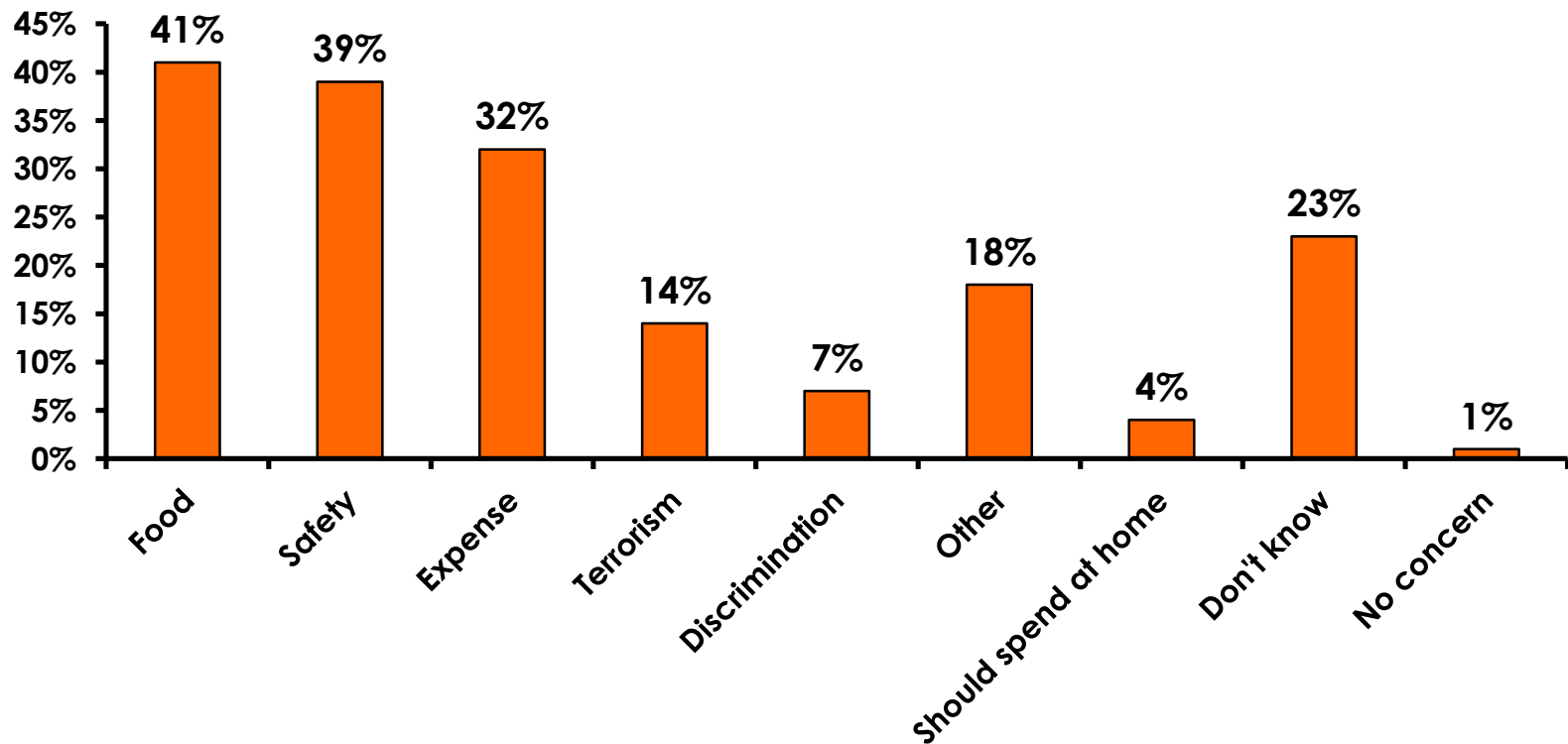
# Sources of Information Post-arrival

- The primary local source of information are the tour staff, hotel staff, and the Internet.



# SECTION 6 **OTHER ISSUES**

# Concerns about travel outside of Taiwan - Overall

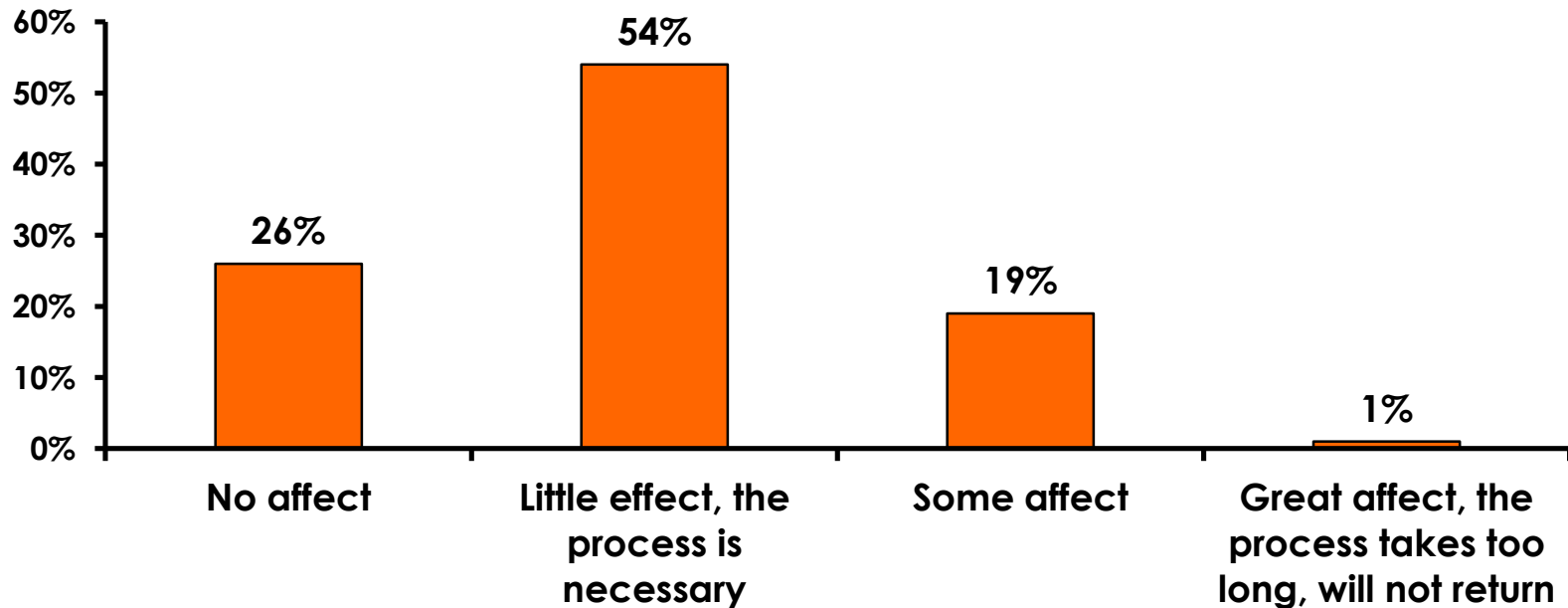




# Concerns about travel outside of Taiwan - By Age & Income

		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	41%	50%	46%	26%	40%	20%	43%	57%	47%	55%	50%	54%	100%	
	Safety	39%	33%	46%	24%	20%	40%	86%	64%	40%	36%	75%	54%	100%	
	Expense	32%	42%	36%	21%		40%	57%	57%	43%	36%	50%	31%		
	Don't know	23%	25%	20%	32%	20%	20%	14%	14%	17%	18%	25%	31%		
	Other	18%	8%	21%	12%	20%		43%	14%	17%	12%	38%	15%	100%	
	Terrorism	14%	17%	15%	15%		20%	29%	21%	17%	15%	25%	15%		
	Discrimination against Taiwanese	7%	8%	5%	6%	40%	20%			3%			8%		
	Should spend at home	4%		4%	6%					3%	9%				
	No concerns	1%		1%	3%							13%	8%		
	Total	Count	147	12	96	34	5	5	7	14	30	33	8	13	1

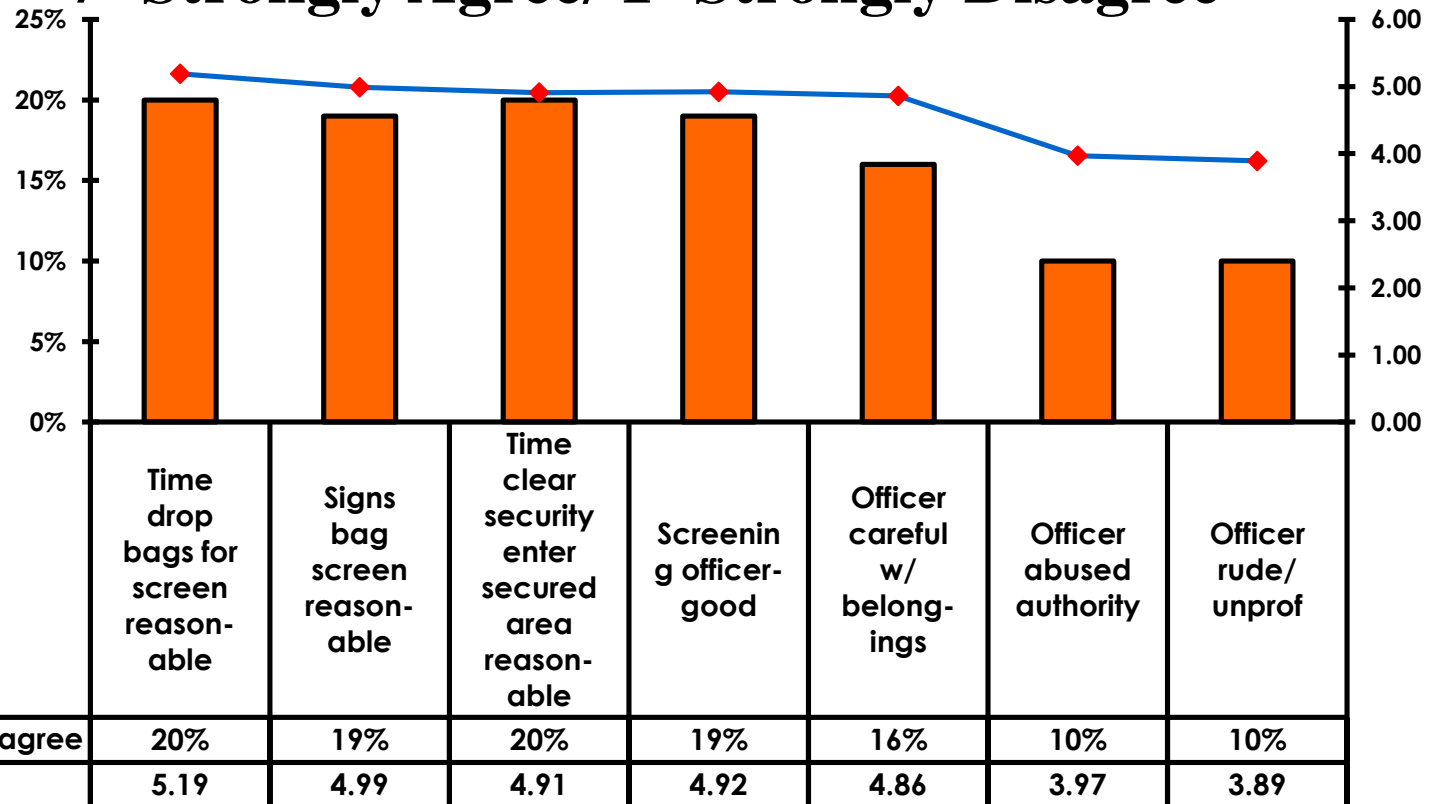
# Security Screening/ Immigration Process at Guam International Airport



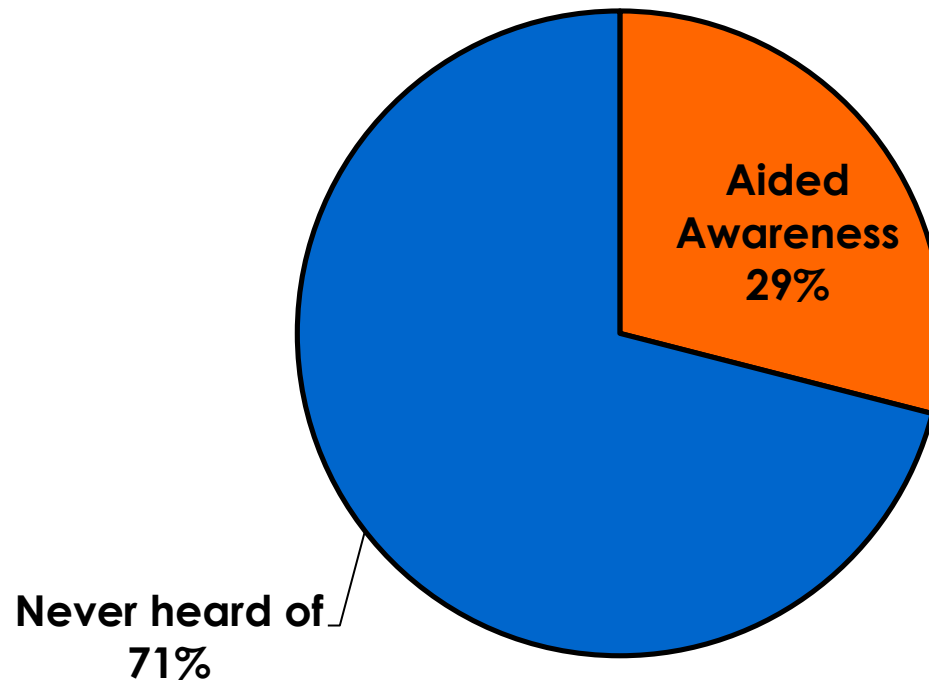
# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



# Shop Guam Festival



# Shop Guam Festival - Impact

n=43

