



GUAM VISITORS BUREAU

Taiwan Visitor Tracker Exit Profile

FY2015

1ST QTR. (OCT~DEC 2014)



Prepared by: QMark Research

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Background & Methodology

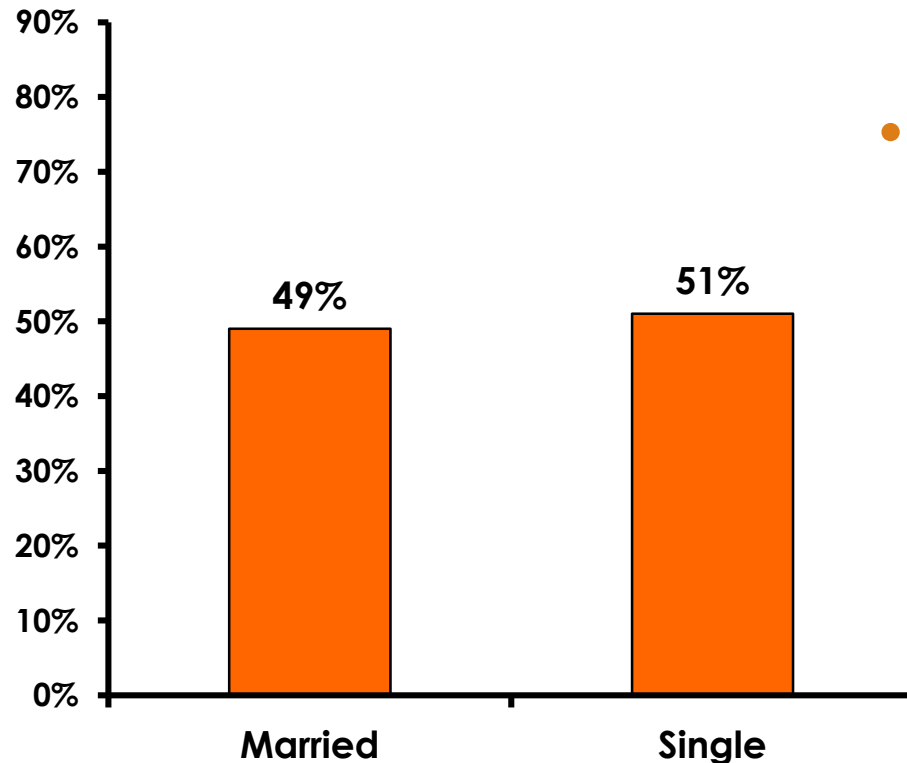
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **150** departing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

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.

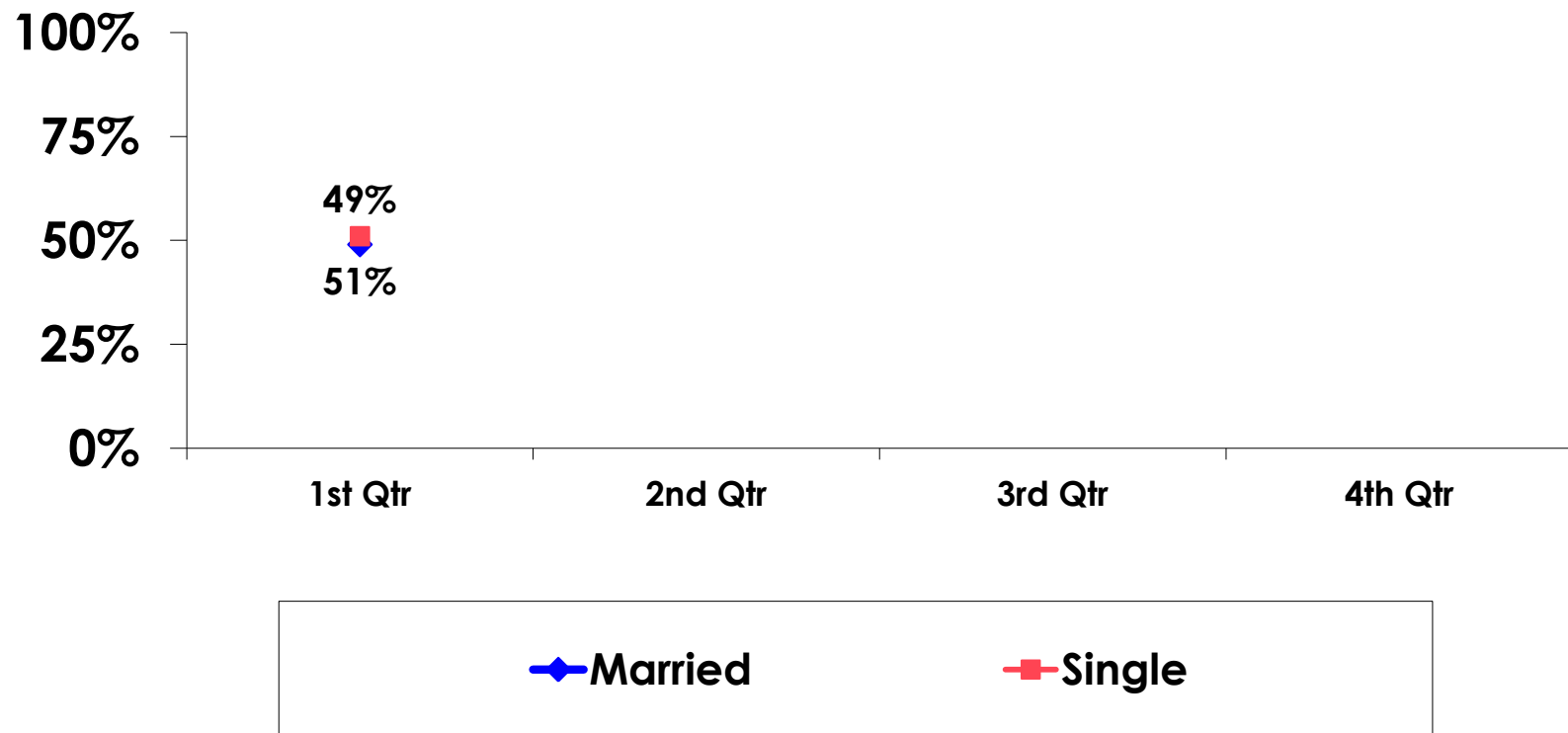
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

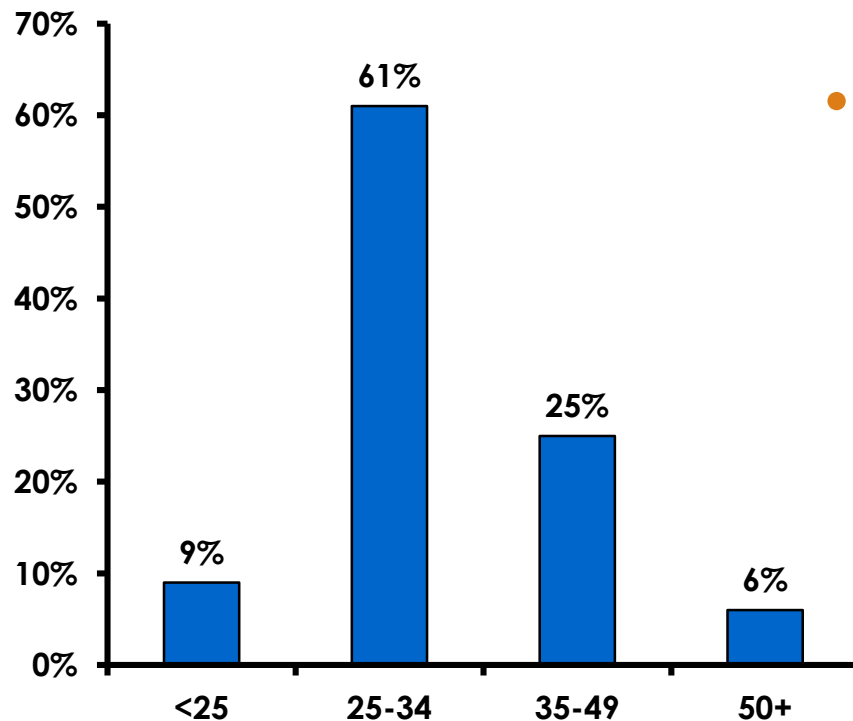


- Proportion of married and single visitors from Taiwan are split evenly.

MARITAL STATUS

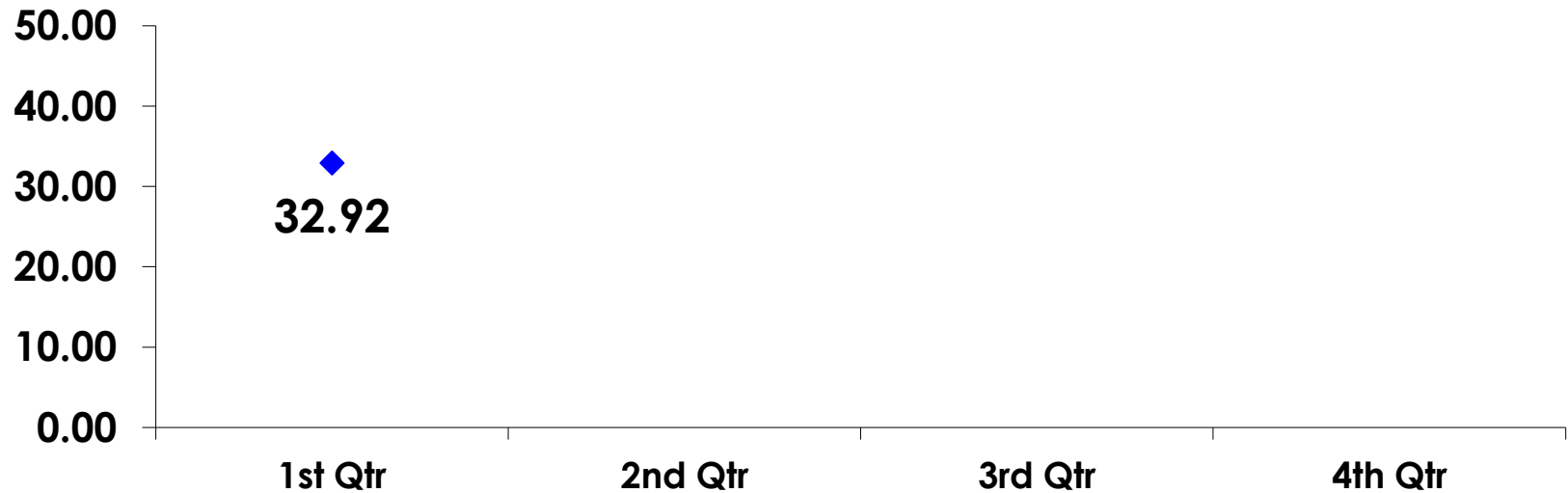


Age - Overall

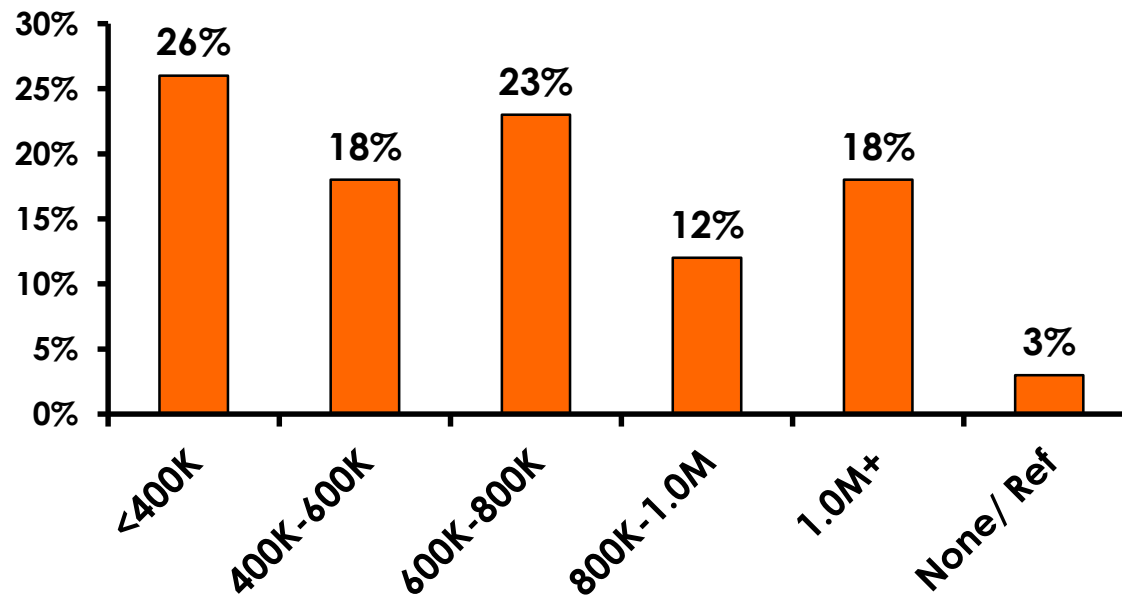


- The average age of the respondents is 32.92 years of age.

AVERAGE - AGE

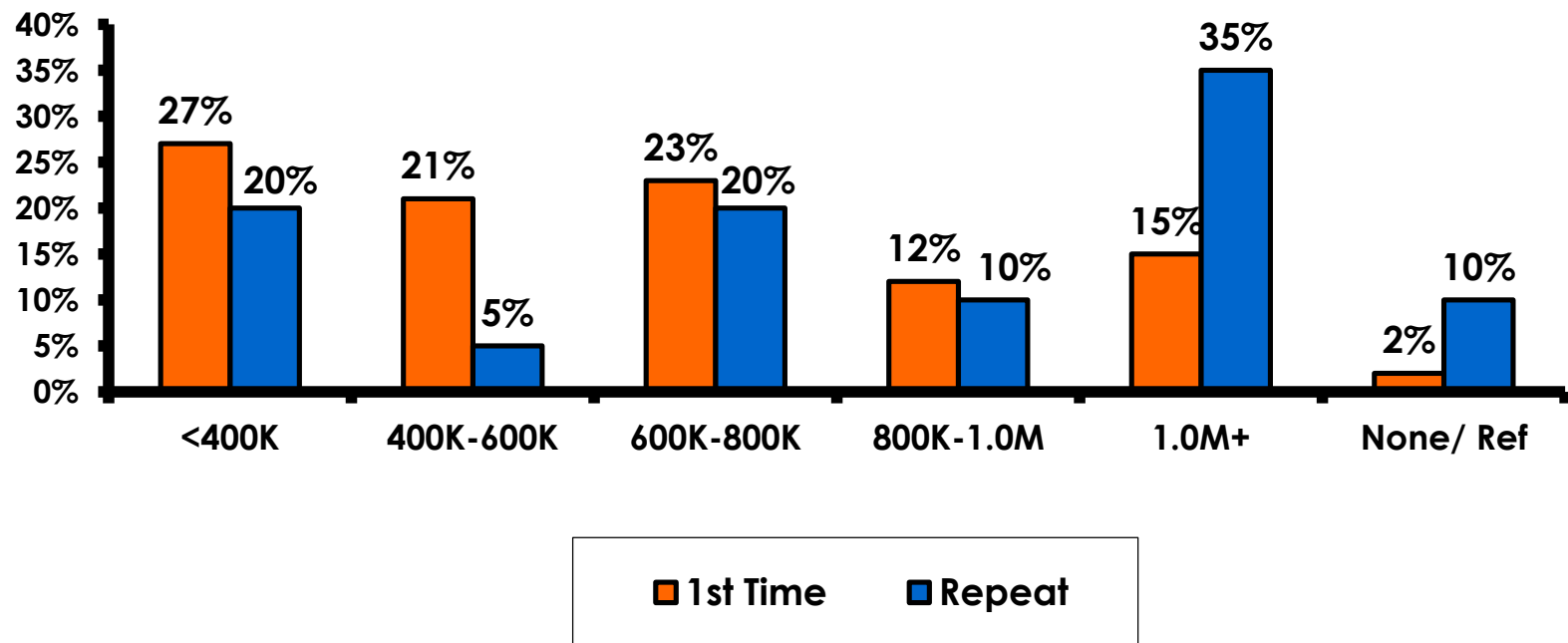


Personal Income



- TWD
30.78=\$1

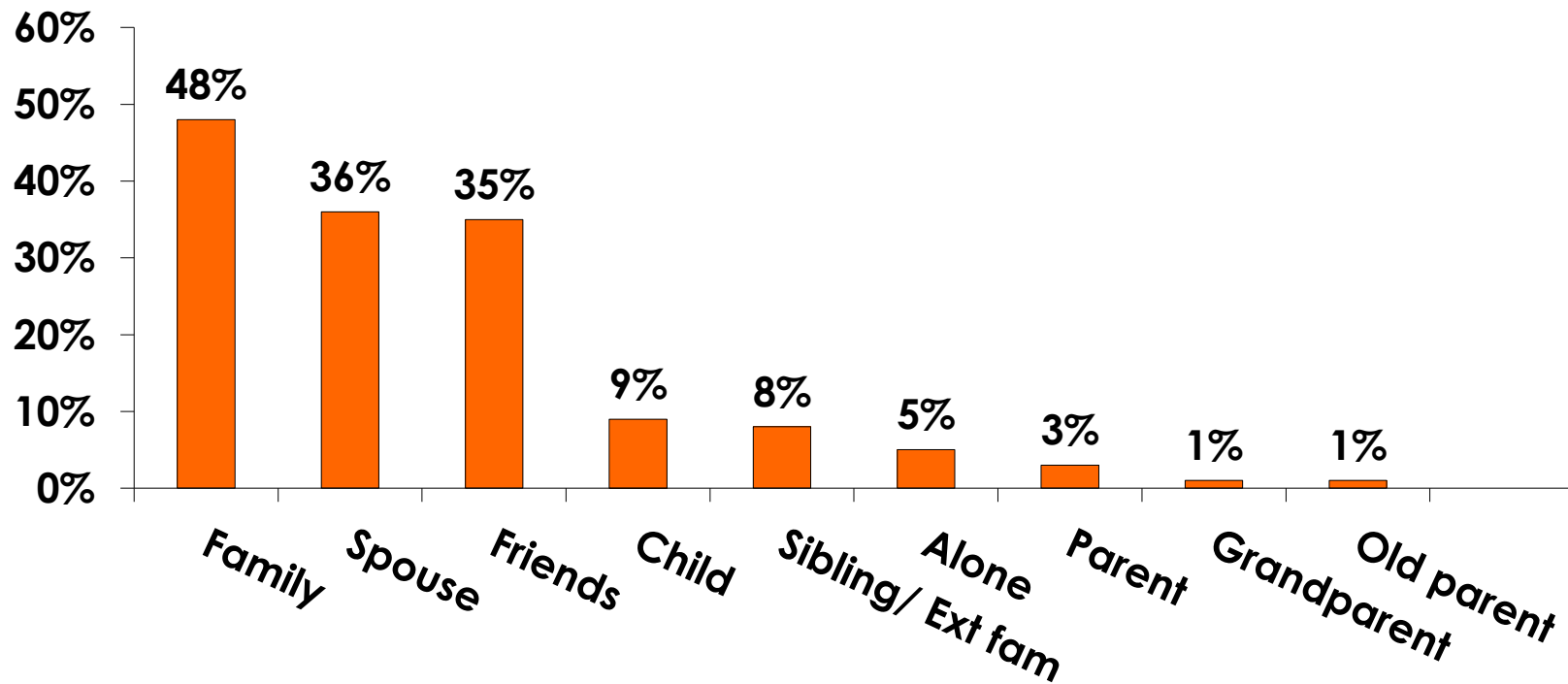
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<=NT160K	Count	7	2	5	2	4		1
		Column N %	5%	3%	6%	15%	5%		11%
	NT160K-NT200K	Count	10	3	7	2	6	1	1
		Column N %	7%	5%	8%	15%	7%	3%	11%
	NT200K-NT400K	Count	21	4	17	4	14	2	1
		Column N %	14%	6%	20%	31%	16%	5%	11%
	NT400K-NT600K	Count	27	11	16	2	17	7	1
		Column N %	18%	18%	19%	15%	20%	19%	11%
	NT600K-NT800K	Count	33	17	16		18	15	
		Column N %	23%	27%	19%		21%	41%	
	NT800K-NT1.0M	Count	17	9	8	1	14	2	
		Column N %	12%	15%	10%	8%	16%	5%	
	NT1.0M+	Count	26	16	10	2	10	9	5
		Column N %	18%	26%	12%	15%	11%	24%	56%
	No Income	Count	5		5		4	1	
		Column N %	3%		6%		5%	3%	
	Total	Count	146	62	84	13	87	37	9

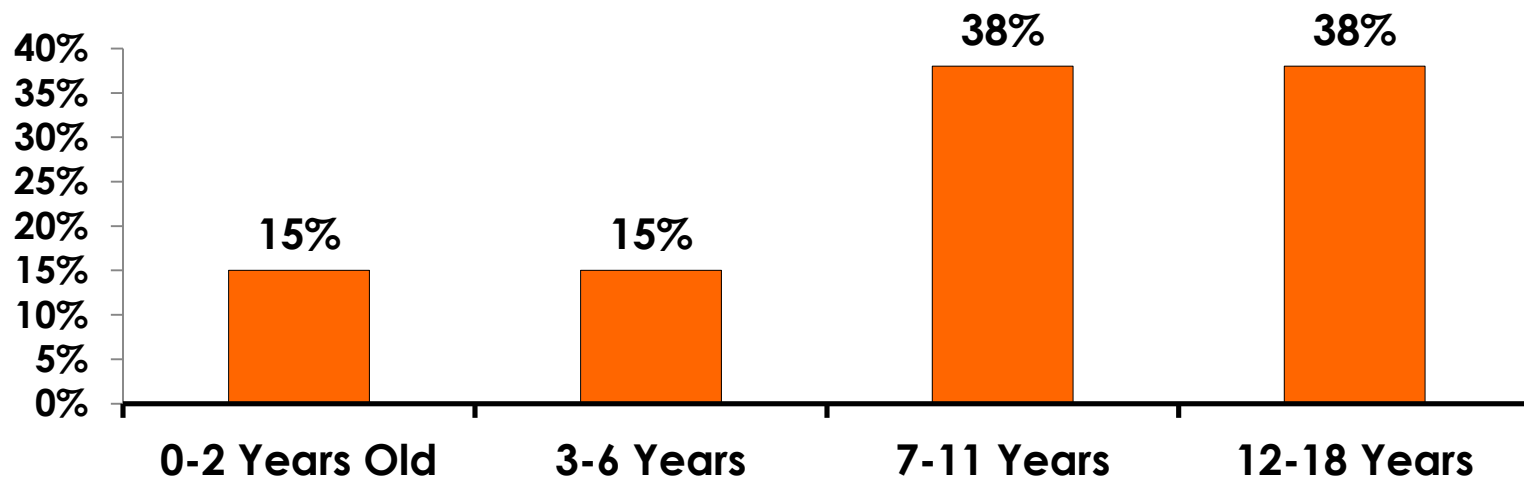
Travel Companions



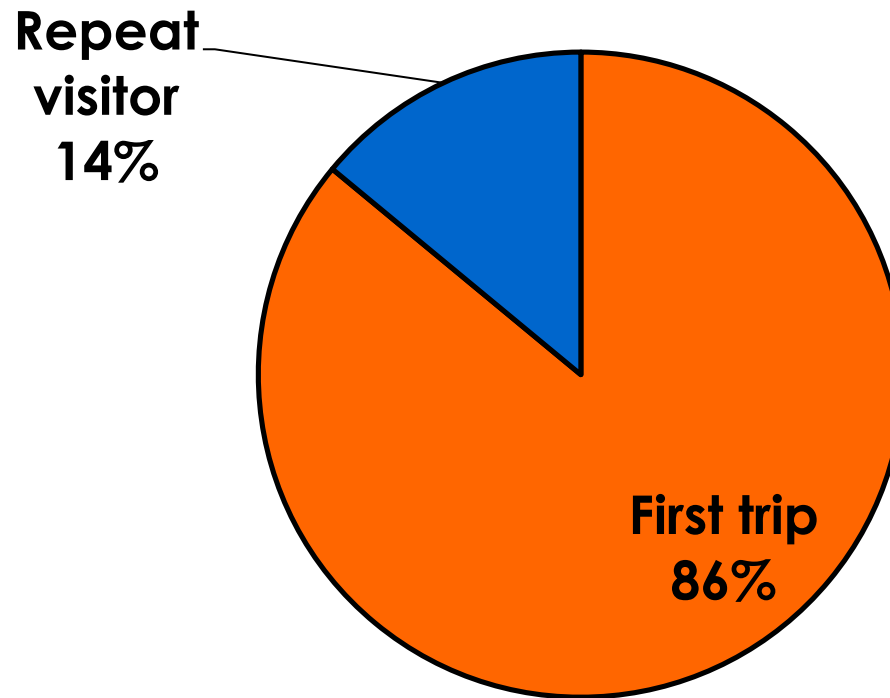
Number of Children Travel Party

n=13 total respondents traveling with children.

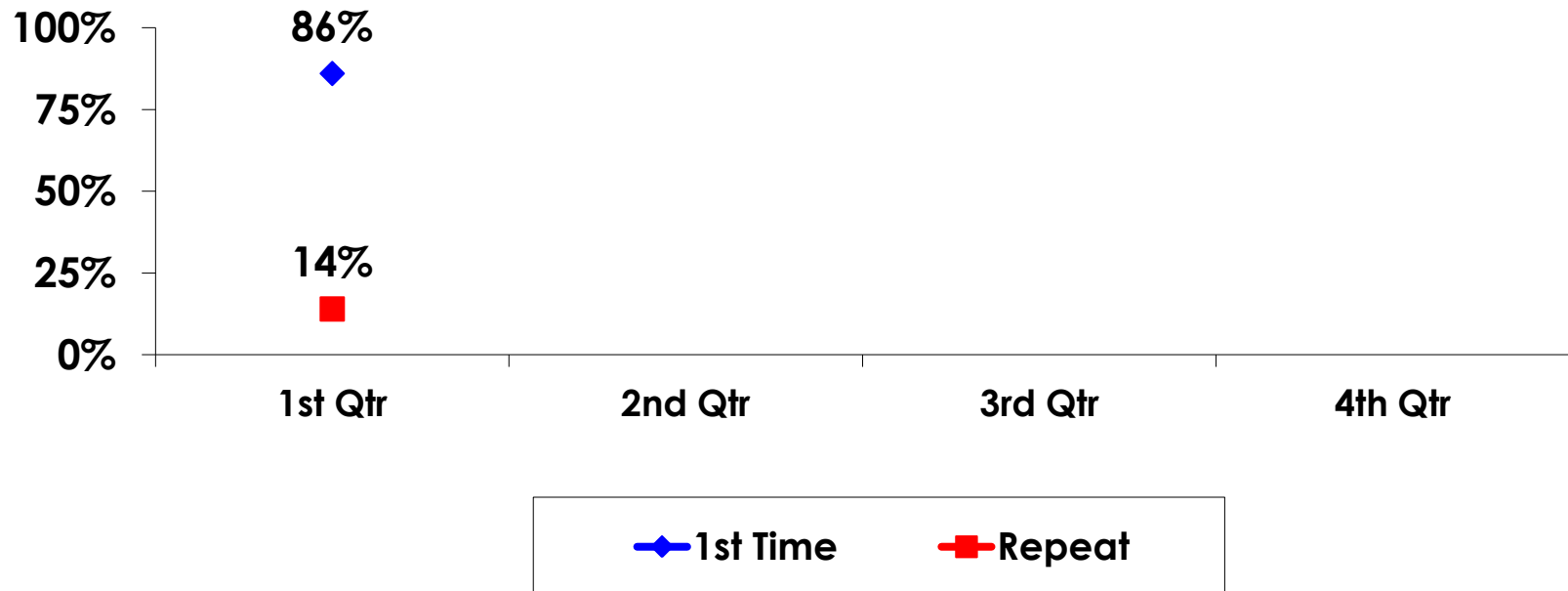
(Of those n=13 respondents, there is a total of 15 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



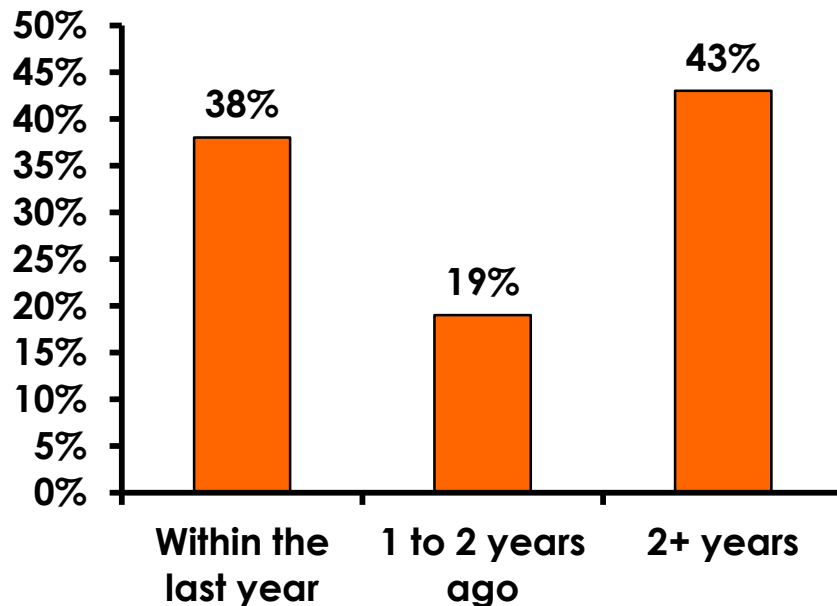
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	64	56	8	
		Column N %	43%	43%	38%	
	Female	Count	86	73	13	
		Column N %	57%	57%	62%	
	Total	Count	150	129	21	
AGE	18-24	Count	13	11	2	
		Column N %	9%	9%	10%	
	25-34	Count	91	86	5	
		Column N %	61%	67%	24%	
	35-49	Count	37	26	11	
		Column N %	25%	20%	52%	
	50+	Count	9	6	3	
		Column N %	6%	5%	14%	
		Total	Count	150	129	21

- A majority of visitors this quarter are first-time travelers to Guam.

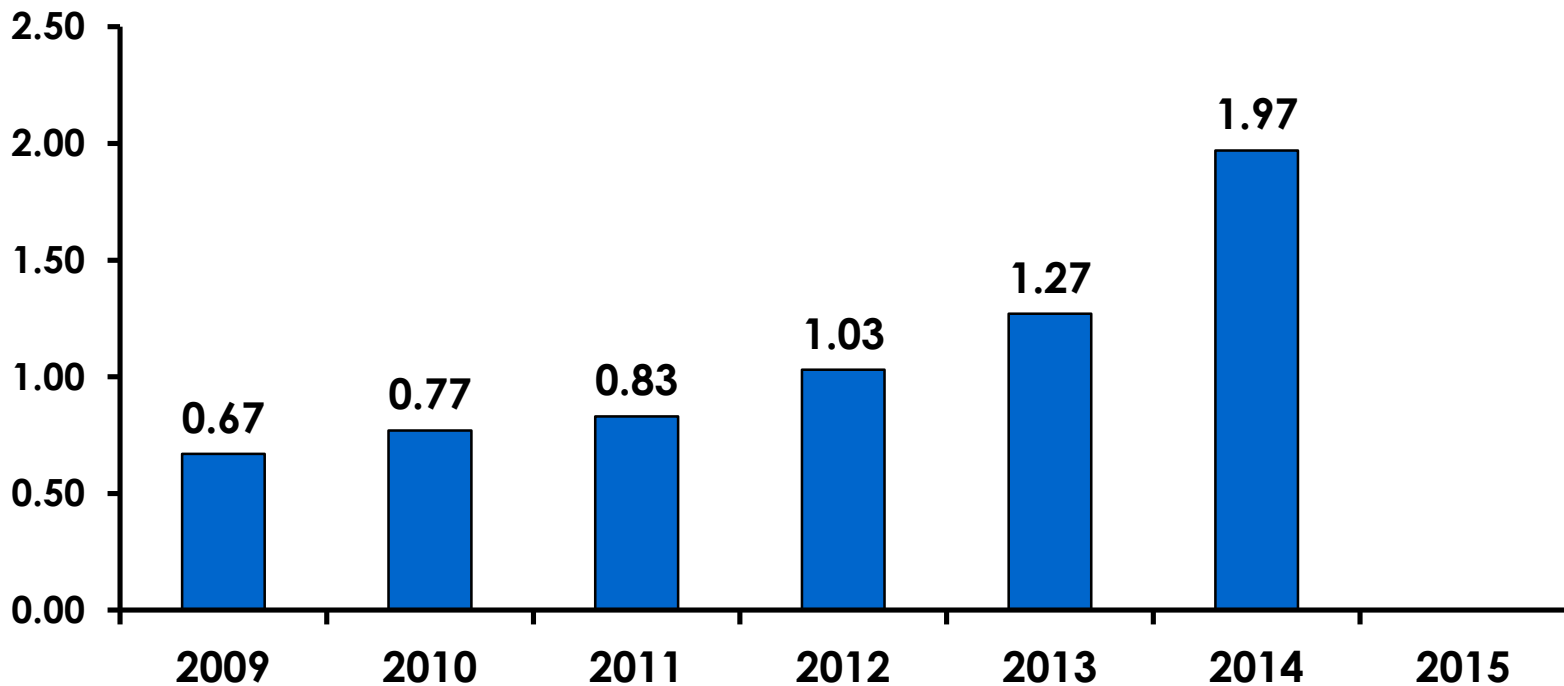
Repeat Visitors Last Trip

n = 21



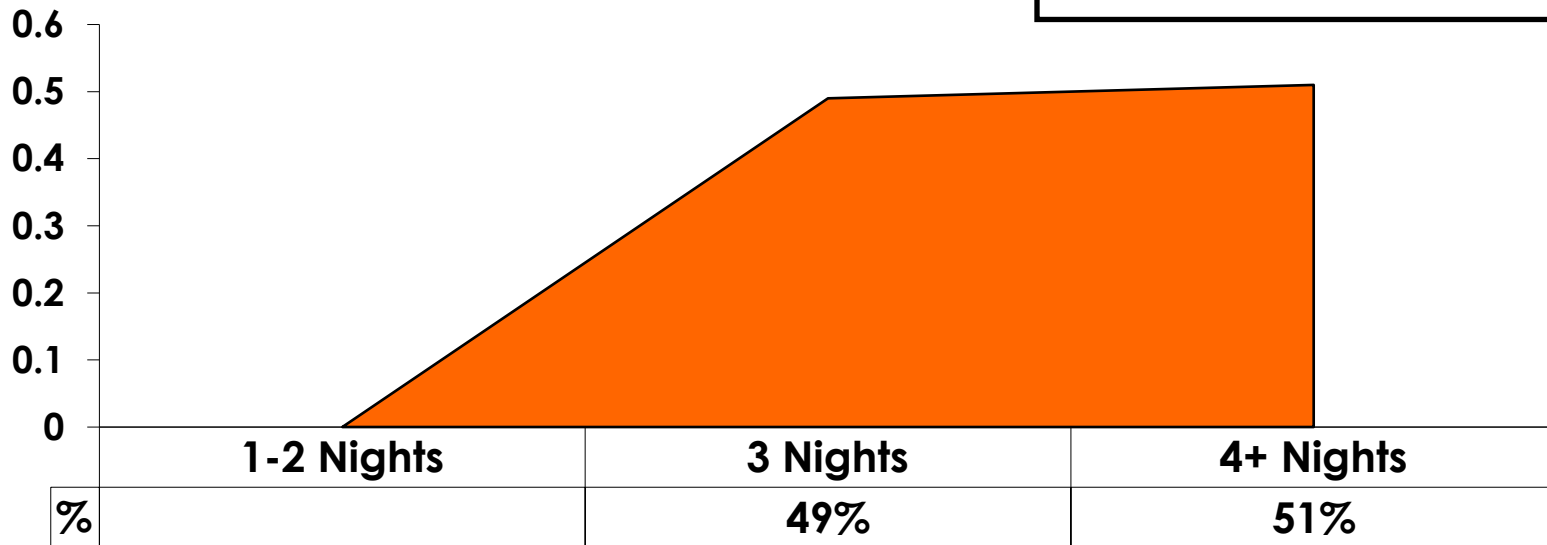
- The average repeat visitor has been to Guam 3.71 times.

Average Number Overnight Trips (2009-2015) (2 nights or more)

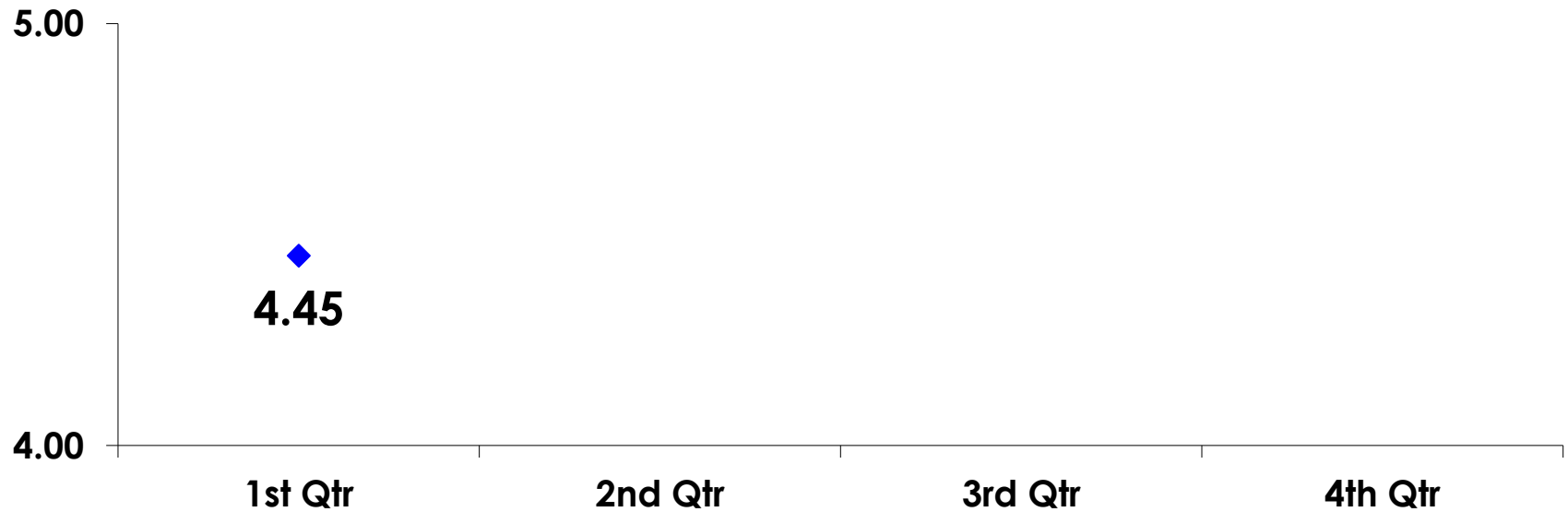


Length of Stay

Mean = 4.45 Days
Median = 4.0 Days



AVG LENGTH OF STAY

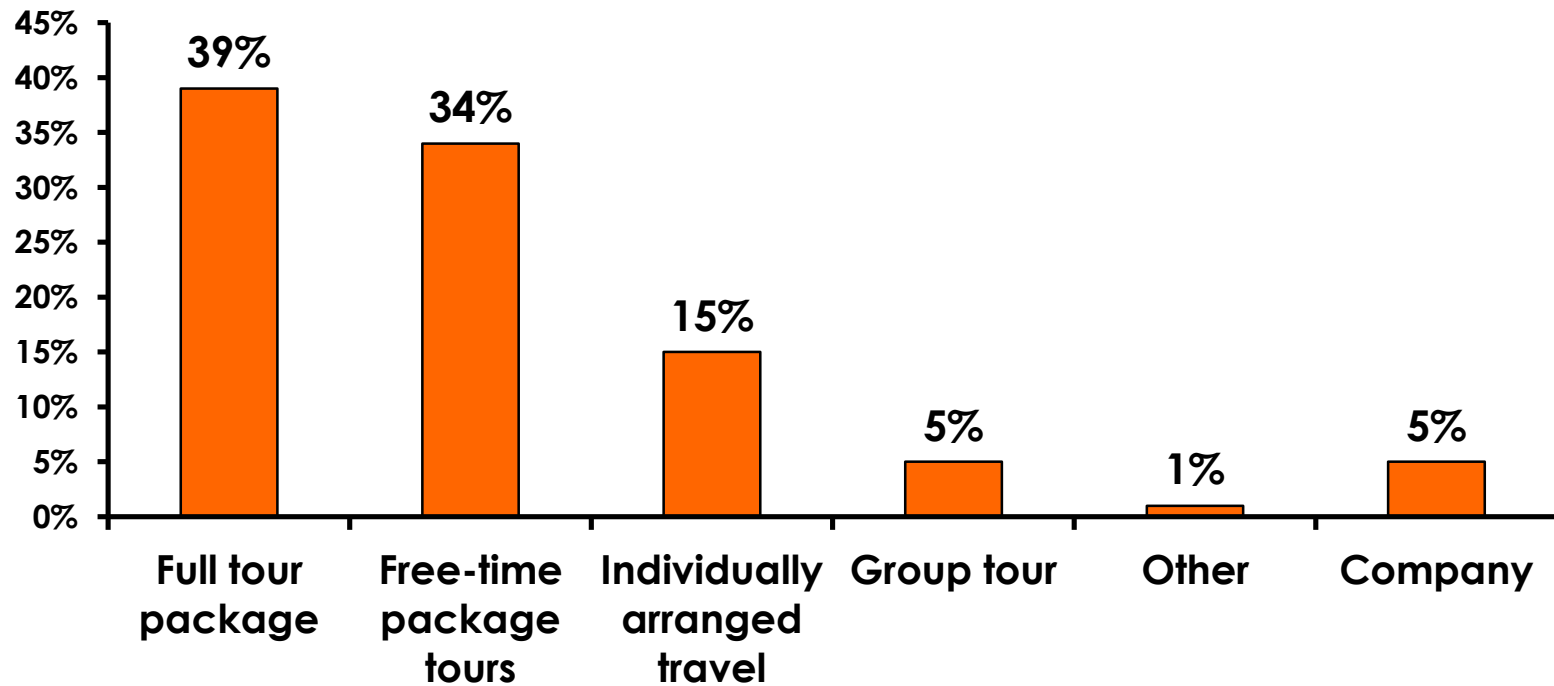


Occupation by Income

		TOTAL	Q26								
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income	
Q25	Company: Office non-mgr	41%	14%	40%	57%	35%	45%	53%	35%	20%	
	Company: Salesperson	13%	14%		10%	27%	9%	12%	12%	20%	
	Prof-specialist	12%	14%	20%	5%	8%	6%	18%	19%	20%	
	Skilled worker	11%	14%	20%	14%	12%	12%		12%		
	Other	9%				12%	15%	12%	12%	20%	
	Freelancer	6%	14%	10%	10%	4%	6%		4%		
	Student	3%	29%					6%		20%	
	Govt- Mgr/ Exec	3%					6%		8%		
	Retired	1%		10%		4%					
	Govt- Executive	1%			5%						
	Total	Count	149	7	10	21	26	33	17	26	5

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

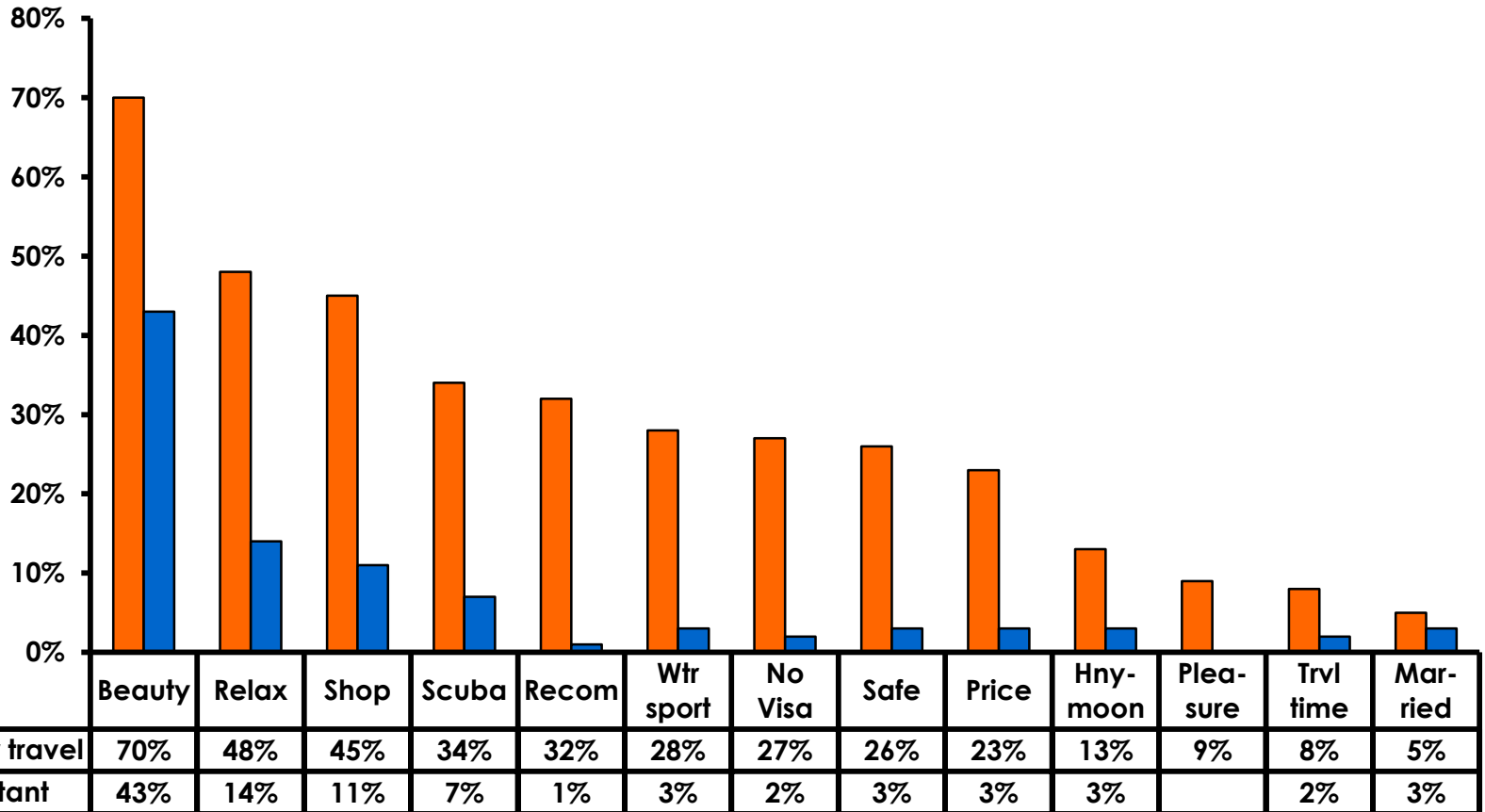


Accommodation by Income

Average length of stay: 4.45 days

		TOTAL	Q26								
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income	
Q9	Fiesta Resort Guam	23%	43%	20%	14%	30%	12%	18%	35%	20%	
	Outrigger Guam Resort	17%	14%	10%	14%	15%	15%	35%	23%		
	Guam Reef & Olive Spa	9%		20%	10%	15%	12%		4%		
	Hotel Nikko Guam	8%	29%	10%	14%	4%	12%	6%			
	Westin Resort Guam	6%		20%	10%	4%	3%		8%	20%	
	Royal Orchid Guam	5%		10%	10%	7%	3%	6%			
	Hyatt Regency Guam	5%			5%	7%	3%	6%	12%		
	Verona Resort & Spa	5%			5%	4%	9%	12%			
	Guam Plaza Hotel	5%		10%		4%	12%			20%	
	Hotel Santa Fe	2%	14%				6%				
	Holiday Resort Guam	2%			10%		3%				
	PIC Club	2%				4%		6%	4%		
	Other	1%					3%		4%		
	Hilton Guam Resort	1%				4%			4%		
	Sheraton Laguna Guam	1%			5%		3%				
	Grand Plaza Hotel	1%			5%			6%			
	Pacific Star Resort & Spa	1%					3%			20%	
	Aqua Suites	1%									
	Tumon Bay Capital Hotel	1%							4%		
	Home stay/ friend/ relative	1%							4%		
	Condo	1%				4%					
	Onward Beach Resort	1%						6%			
	Pacific Bay Hotel	1%								20%	
	Total	Count	150	7	10	21	27	33	17	26	5

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Relaxation,
- Shopping

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	70%	77%	72%	70%	33%	70%	69%	
	Relax	48%	69%	46%	57%	11%	50%	47%	
	Shopping	45%	77%	42%	49%	11%	34%	53%	
	Scuba	34%	38%	40%	22%	11%	39%	29%	
	Recomm- friend/family/trvl agnt	32%	23%	33%	35%	11%	27%	35%	
	Water sports	28%	15%	30%	30%	22%	30%	27%	
	No Visa requirement	27%	38%	29%	22%	11%	27%	27%	
	Safe	26%	38%	21%	32%	22%	19%	31%	
	Price	23%	31%	19%	30%	22%	25%	21%	
	Honeymoon	13%	8%	19%	5%		16%	12%	
	Pleasure	9%	31%	9%	3%		11%	7%	
	Short travel time	8%		9%	8%	11%	5%	11%	
	Other	7%	8%	6%	8%	11%	5%	8%	
	Married/ Attn wedding	5%	8%	6%		11%	3%	6%	
	Previous trip	5%	8%	2%	11%		5%	5%	
	Company/ Business Trip	3%	8%		3%	33%	3%	4%	
	Visit friends/ Relatives	3%		3%	3%	11%		6%	
	Convention/ Trade/ Conference	1%	8%				2%		
	Total	Count	149	13	90	37	9	64	85

Motivation by Income

		TOTAL	Q26								
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income	
Q5A	Natural beauty	70%	43%	90%	81%	74%	72%	65%	58%	60%	
	Relax	48%	43%	40%	52%	48%	53%	59%	42%	40%	
	Shopping	45%	43%	50%	62%	33%	44%	29%	54%	40%	
	Scuba	34%	57%	40%	24%	37%	25%	35%	38%		
	Recomm- friend/family/trvl agnt	32%	43%	30%	33%	30%	41%	29%	19%	20%	
	Water sports	28%	14%	10%	14%	30%	34%	41%	31%		
	No Visa requirement	27%		30%	29%	30%	25%	24%	35%	20%	
	Safe	26%	14%	30%	24%	33%	19%	29%	31%	20%	
	Price	23%		30%	14%	30%	25%	6%	35%	20%	
	Honeymoon	13%	14%	10%	14%	15%	16%	12%	8%		
	Pleasure	9%	14%	10%	5%	11%	6%	6%	8%	20%	
	Short travel time	8%			10%	7%	13%	12%	4%		
	Other	7%	14%			4%	6%	6%	15%	20%	
	Married/ Attn wedding	5%			14%	4%		6%	4%		
	Previous trip	5%						12%	12%	40%	
	Company/ Business Trip	3%	14%		10%				8%		
	Visit friends/ Relatives	3%			5%		3%	6%	8%		
	Convention/ Trade/ Conference	1%			5%						
	Total	Count	149	7	10	21	27	32	17	26	5

SECTION 3 **EXPENDITURES**

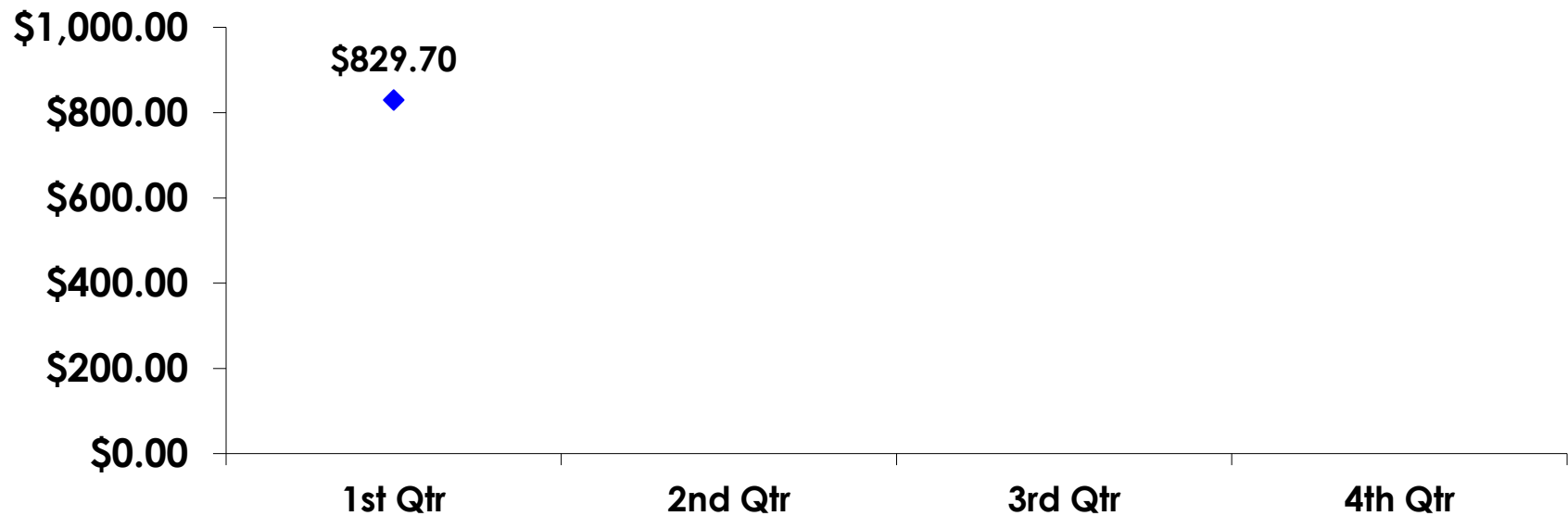
Prepaid Expenditures

TWD 30.78/US\$1

- \$1,171.61 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$7,797 = maximum (highest amount recorded for the entire sample)
- \$829.70 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$829.70

Breakdown of Prepaid Expenditures

TWD 30.78=\$1

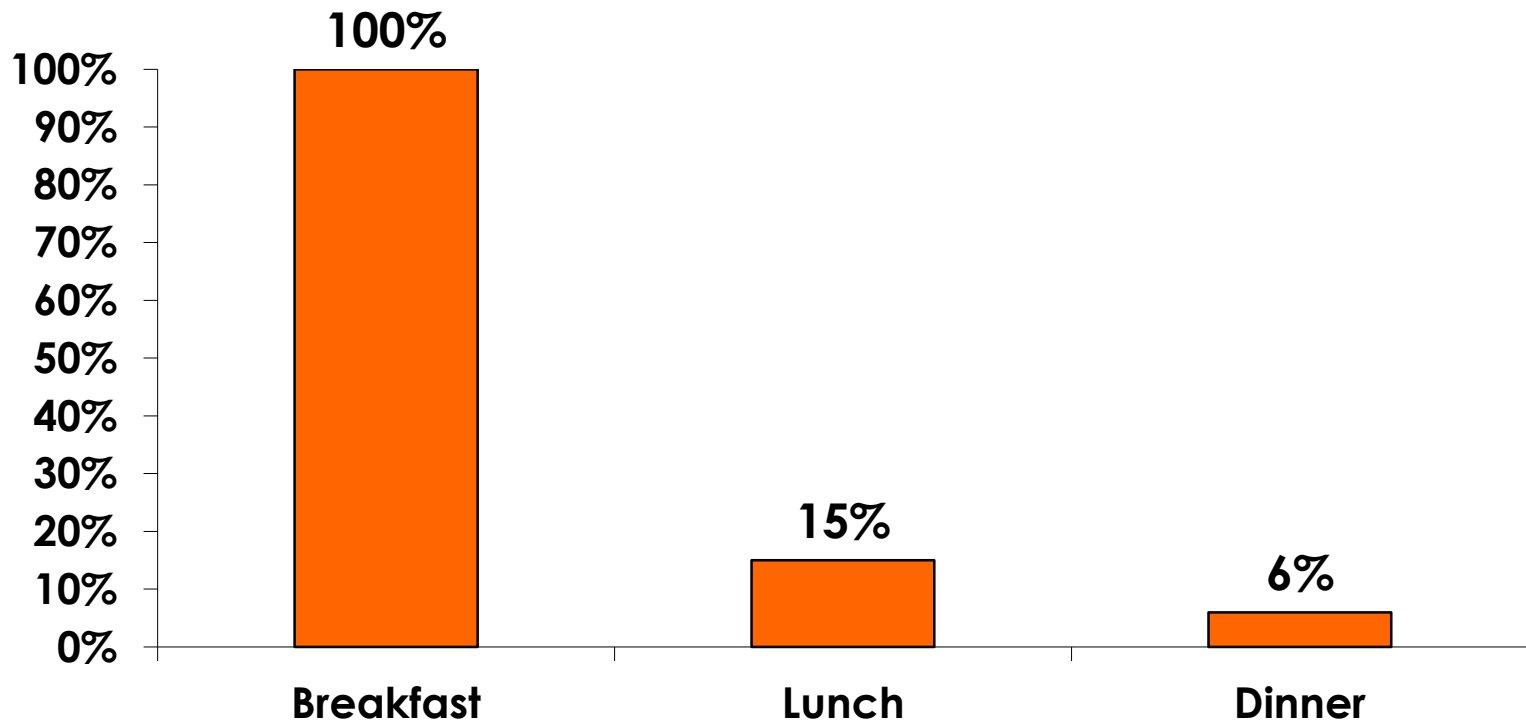
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,203.86
Air & Accommodation w/ daily meal package	\$1,357.19
Air only	\$1,348.28
Accommodation only	\$1,591.94
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$97.47
Ground transportation – Taiwan	\$44.33
Ground transportation – Guam	\$126.71
Optional tours/ activities	\$232.29
Other expenses	\$427.23
Total Prepaid	\$1,171.61

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n= 67

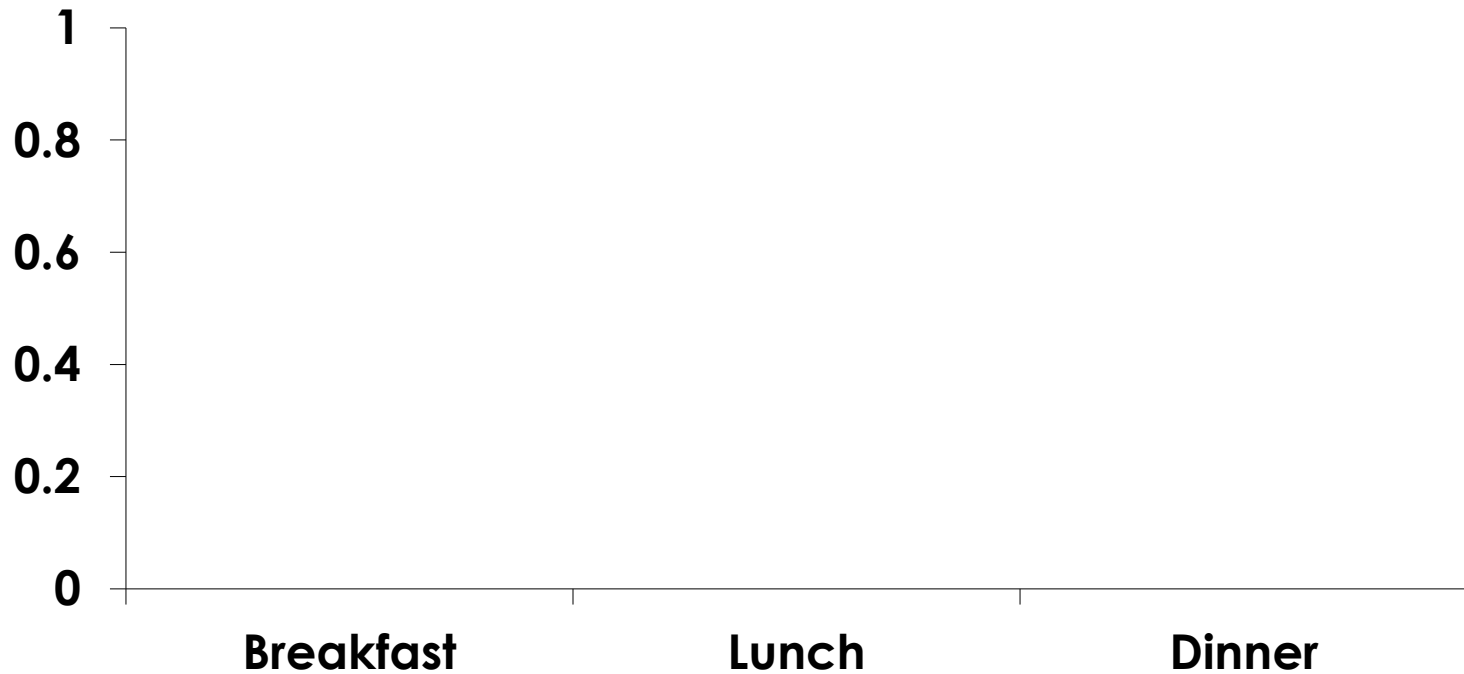


Mean=\$1,357.19 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

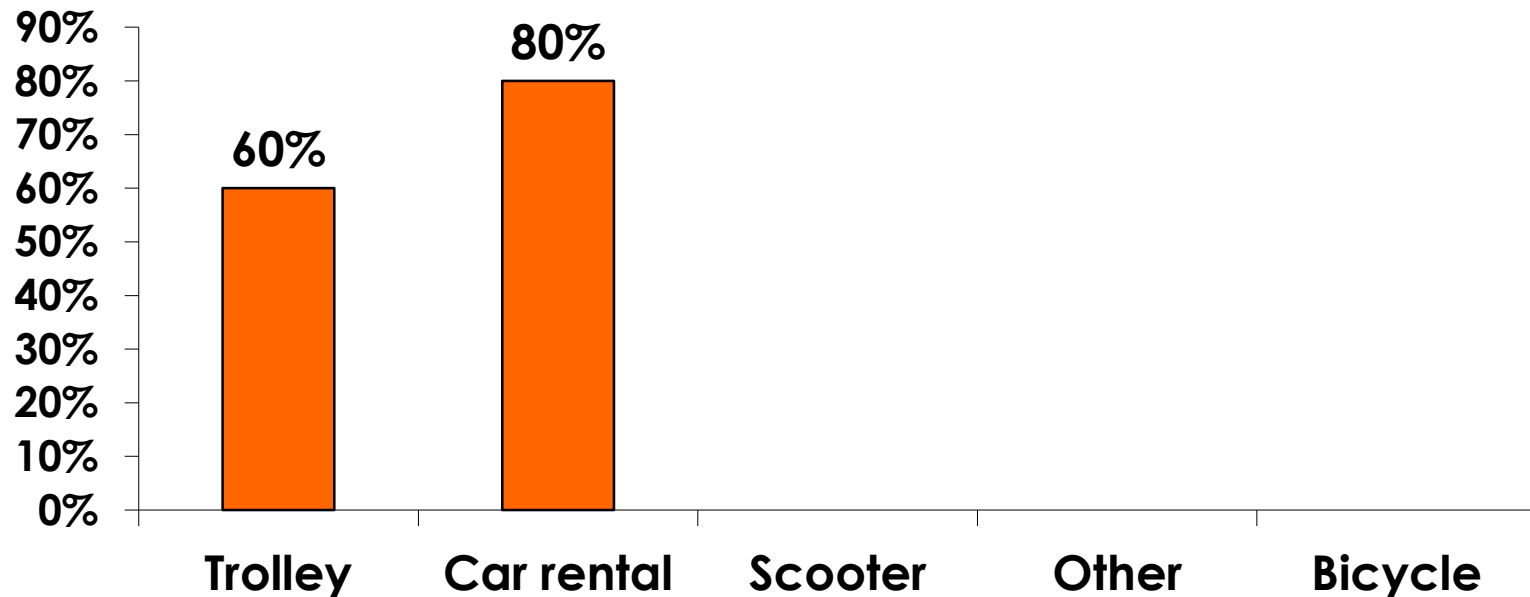
n=x



Mean=\$xxx per travel party

PREPAID GROUND TRANSPORTATION

n=5



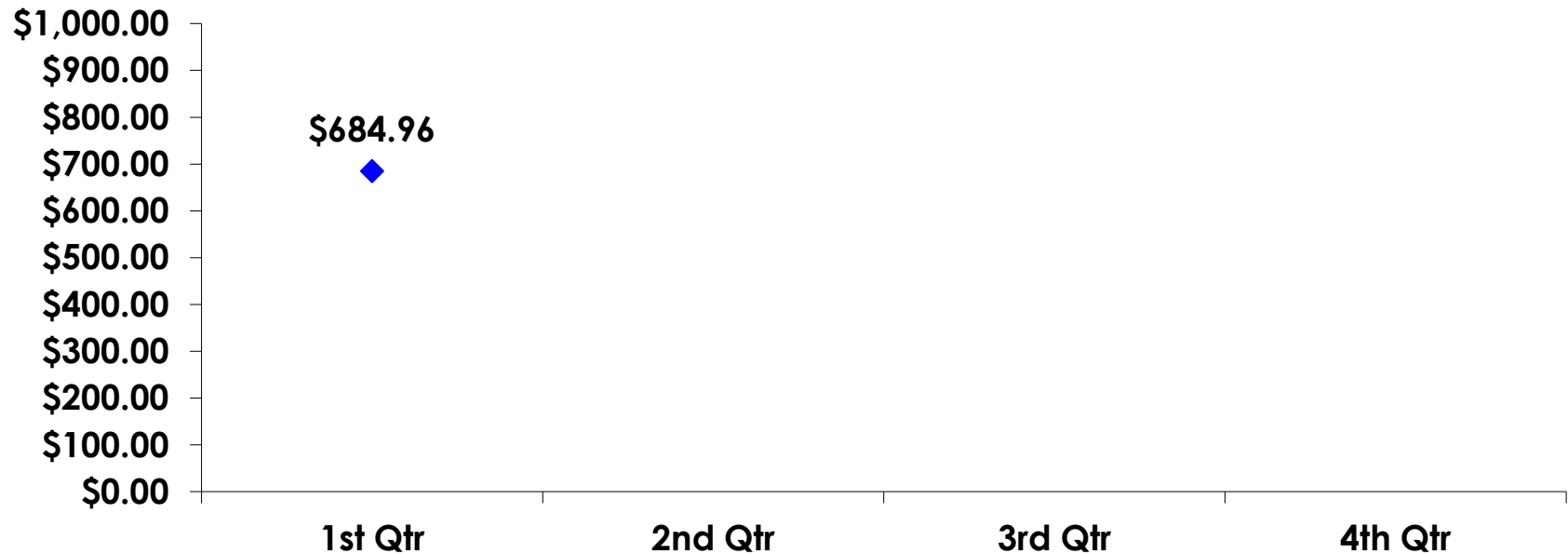
Mean=\$126.71 per travel party

On-Island Expenditures

- \$936.88 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,000 = Maximum (highest amount recorded for the entire sample)
- \$684.96 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

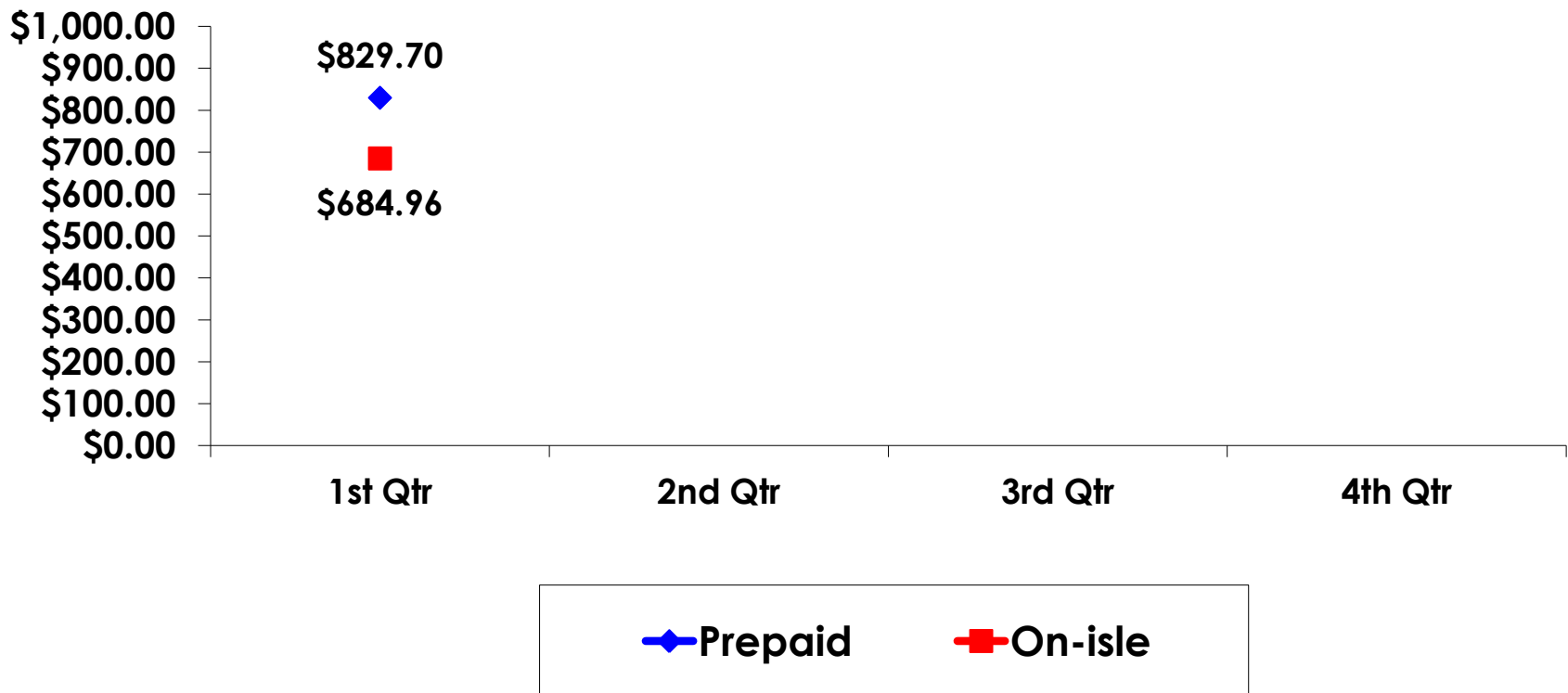


YTD = \$684.96

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$829.70

On-Isle YTD = \$684.96



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	\$684.96	\$571.58	\$769.34	\$366.00	\$497.36	\$805.14	\$717.00	\$766.25	\$708.45	\$808.78	\$1,325.00
	Median	\$413	\$305	\$557	\$150	\$305	\$356	\$750	\$800	\$400	\$600	\$1,050
	Minimum	\$0	\$0	\$0	\$130	\$0	\$0	\$100	\$0	\$0	\$0	\$150
	Maximum	\$3,500	\$3,000	\$3,500	\$1,200	\$2,700	\$3,000	\$1,710	\$1,950	\$3,500	\$3,500	\$3,050

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$7.43	\$13.59	\$2.84	\$0.00	\$7.68	\$11.22	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$34.60	\$39.30	\$31.10	\$13.85	\$39.95	\$33.11	\$16.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$40.39	\$48.05	\$34.70	\$55.38	\$37.98	\$37.38	\$55.56
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$55.01	\$74.73	\$40.34	\$38.46	\$66.84	\$41.08	\$16.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$166.21	\$170.70	\$162.86	\$88.85	\$181.93	\$149.19	\$188.89
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- OTHER	Mean	\$119.43	\$71.75	\$154.91	\$34.62	\$93.45	\$98.92	\$588.89
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$50
TRANS	Mean	\$30.37	\$29.20	\$31.23	\$48.08	\$24.82	\$34.08	\$45.56
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$487.34	\$396.25	\$555.13	\$421.54	\$416.25	\$653.84	\$616.67
	Median	\$100	\$20	\$200	\$0	\$82	\$200	\$0
TOTAL	Mean	\$936.88	\$840.92	\$1,008.29	\$700.77	\$861.38	\$1,061.51	\$1,528.89
	Median	\$600	\$504	\$600	\$300	\$500	\$650	\$1,500

On-Island Expenditures

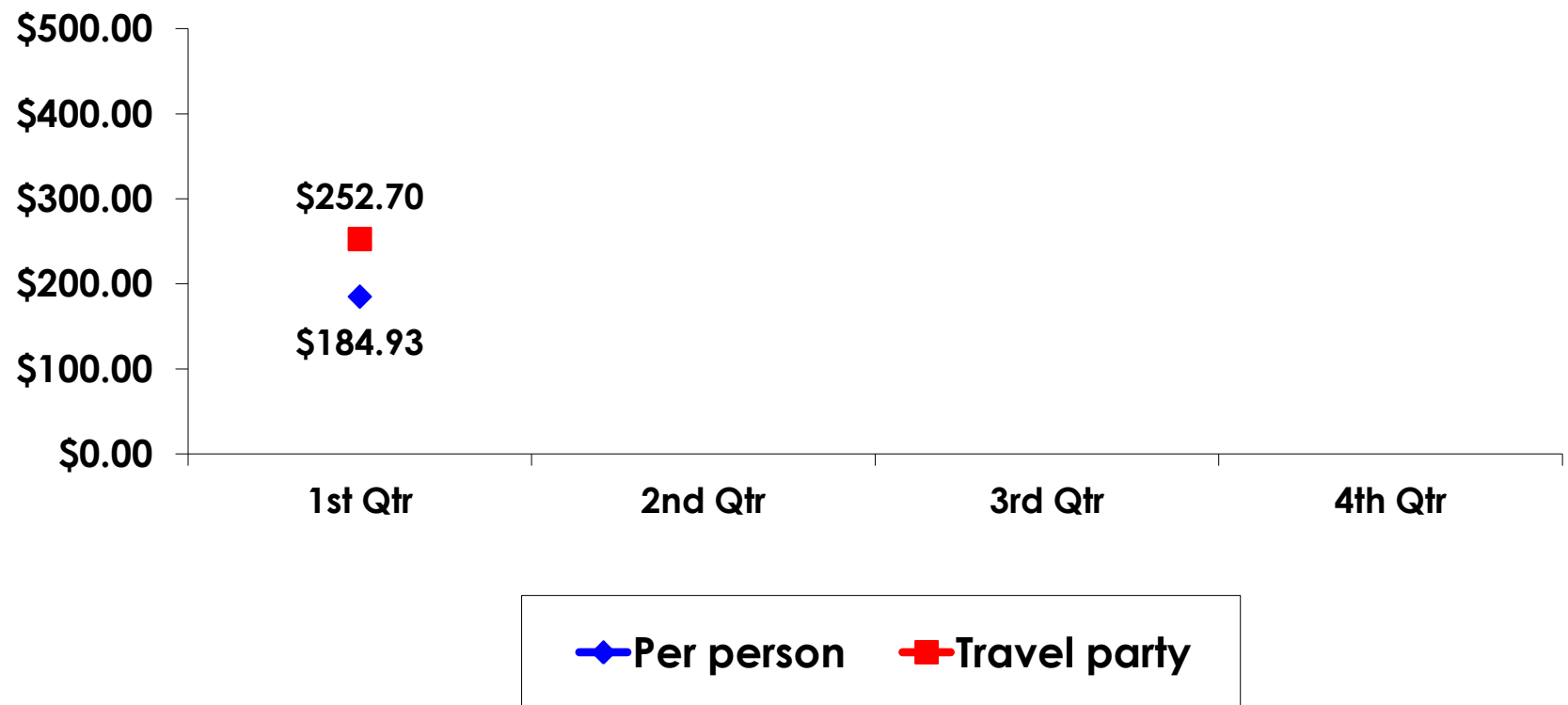
First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$7.43	\$8.57	\$0.38
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$34.60	\$31.55	\$53.33
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$40.39	\$36.04	\$67.14
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$55.01	\$59.32	\$28.57
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$166.21	\$169.47	\$146.19
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$119.43	\$107.74	\$191.24
	Median	\$0	\$0	\$0
TRANS	Mean	\$30.37	\$27.65	\$47.05
	Median	\$0	\$0	\$0
OTHER	Mean	\$487.34	\$506.18	\$371.62
	Median	\$100	\$100	\$0
TOTAL	Mean	\$936.88	\$941.98	\$905.52
	Median	\$600	\$600	\$500

ON-ISLE EXPENDITURES – Per Day

Per Person YTD = \$184.93

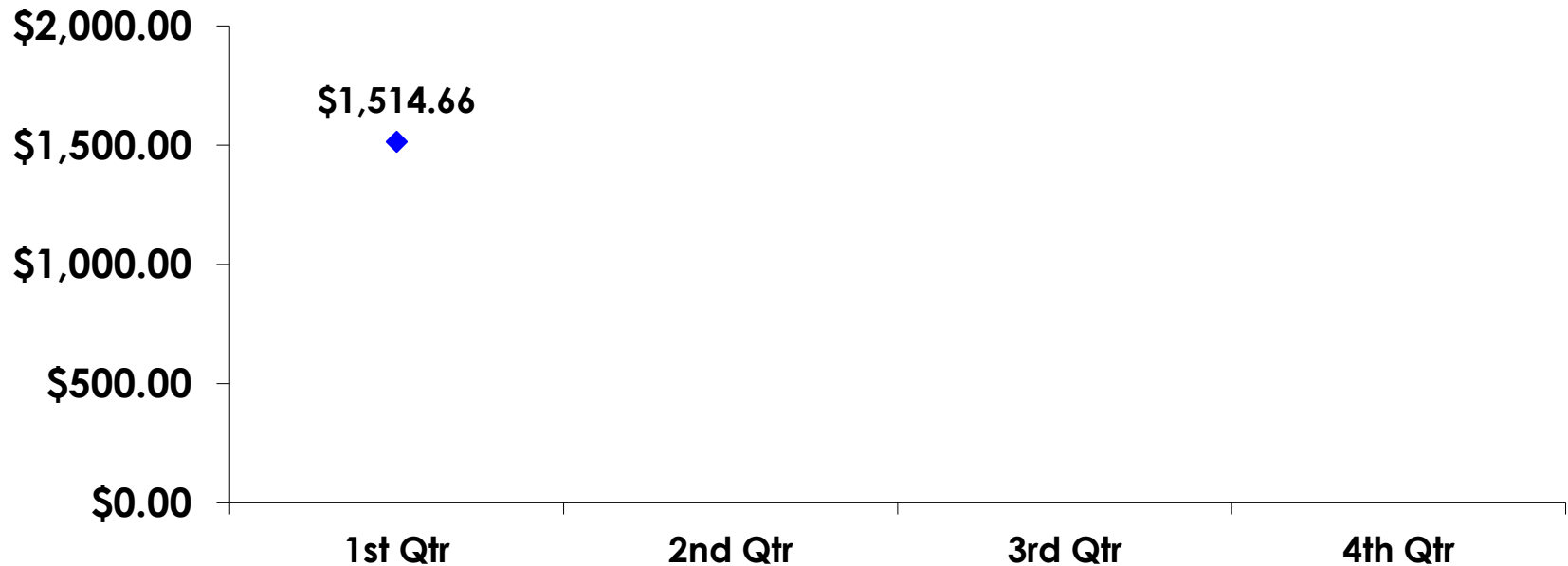
Travel Party YTD = \$252.70



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,514.66 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,410 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



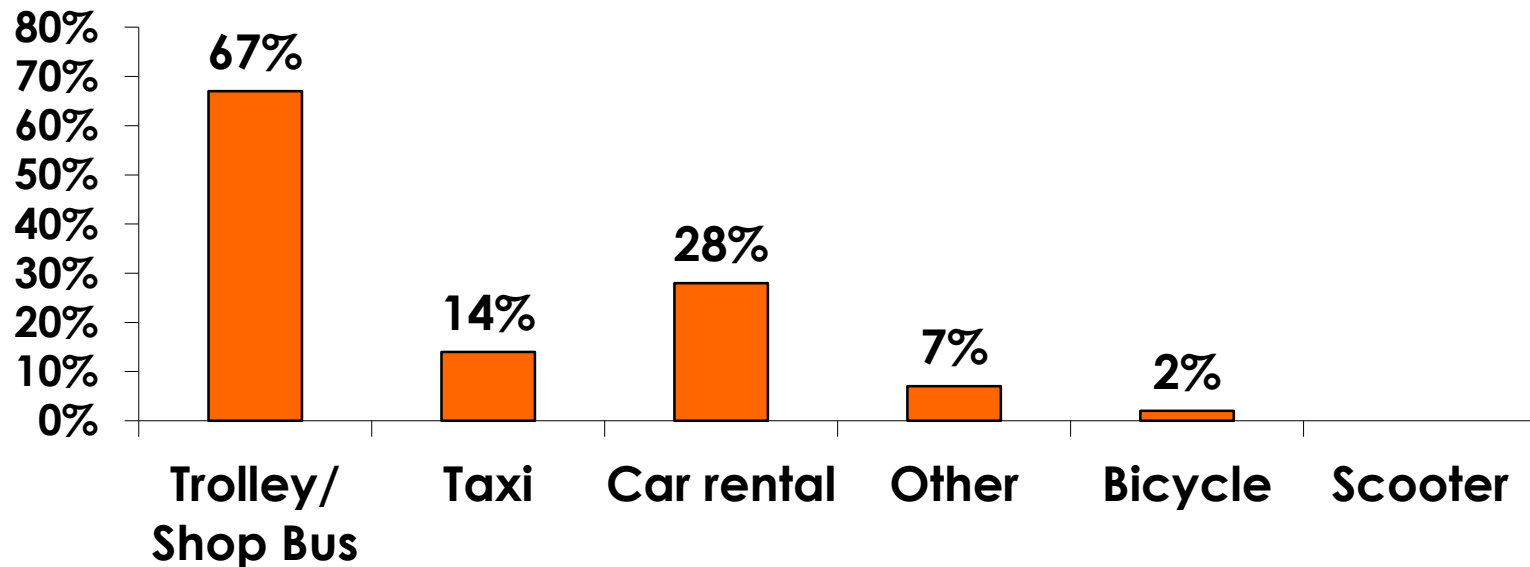
YTD=\$1,514.66

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$7.43
Food & beverage in fast food restaurant/convenience store	\$34.60
Food & beverage at restaurants or drinking establishments outside a hotel	\$40.39
Optional tours and activities	\$55.01
Gifts/ souvenirs for yourself/companions	\$166.21
Gifts/ souvenirs for friends/family at home	\$119.43
Local transportation	\$30.37
Other expenses not covered	\$487.34
Average Total	\$936.88

Local Transportation

n=43



Mean=\$30.37 per travel party

Guam Airport Expenditures

- \$79.71 = 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

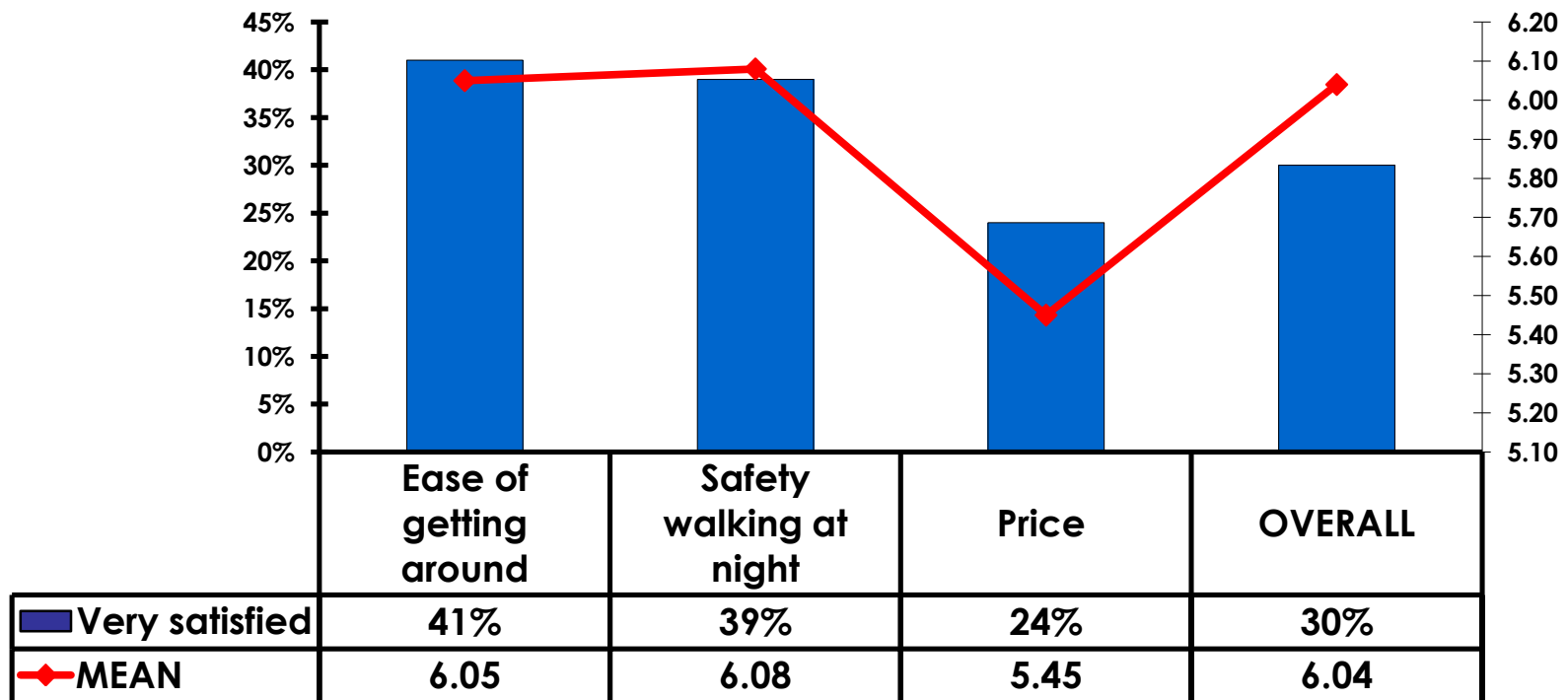
	MEAN \$
Food & Beverages	\$12.87
Gifts/Souvenirs Self	\$30.13
Gifts/Souvenirs Others	\$36.72
Total	\$79.71

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

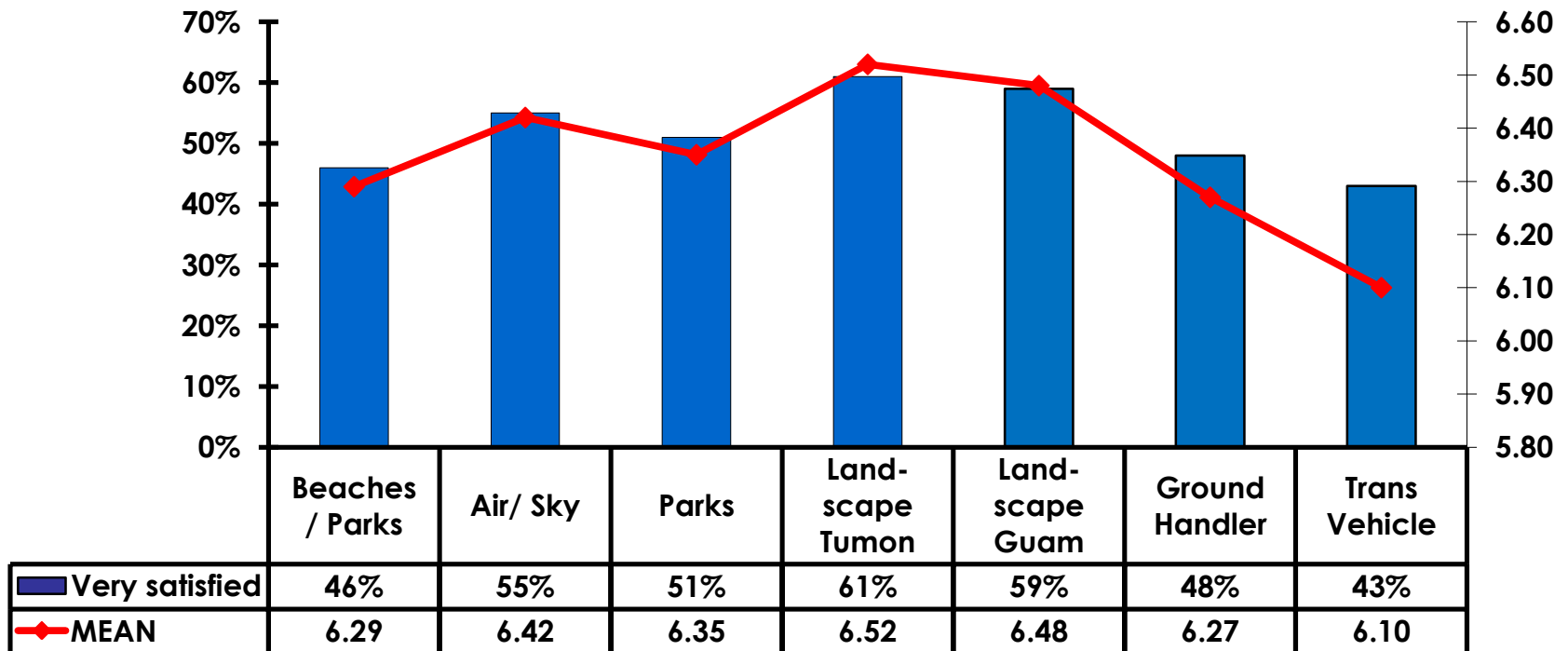
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

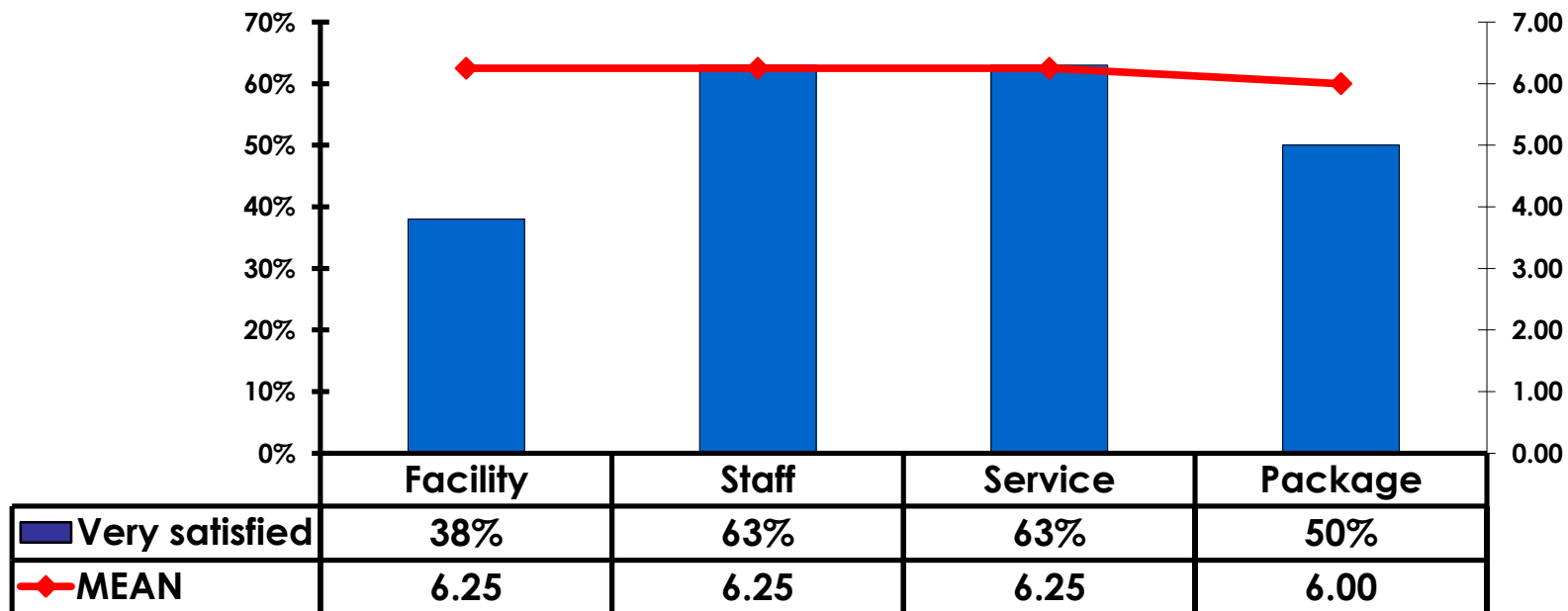
7=Very Satisfied/1=Very Dissatisfied



Wedding Satisfaction Scores

7pt Rating Scale

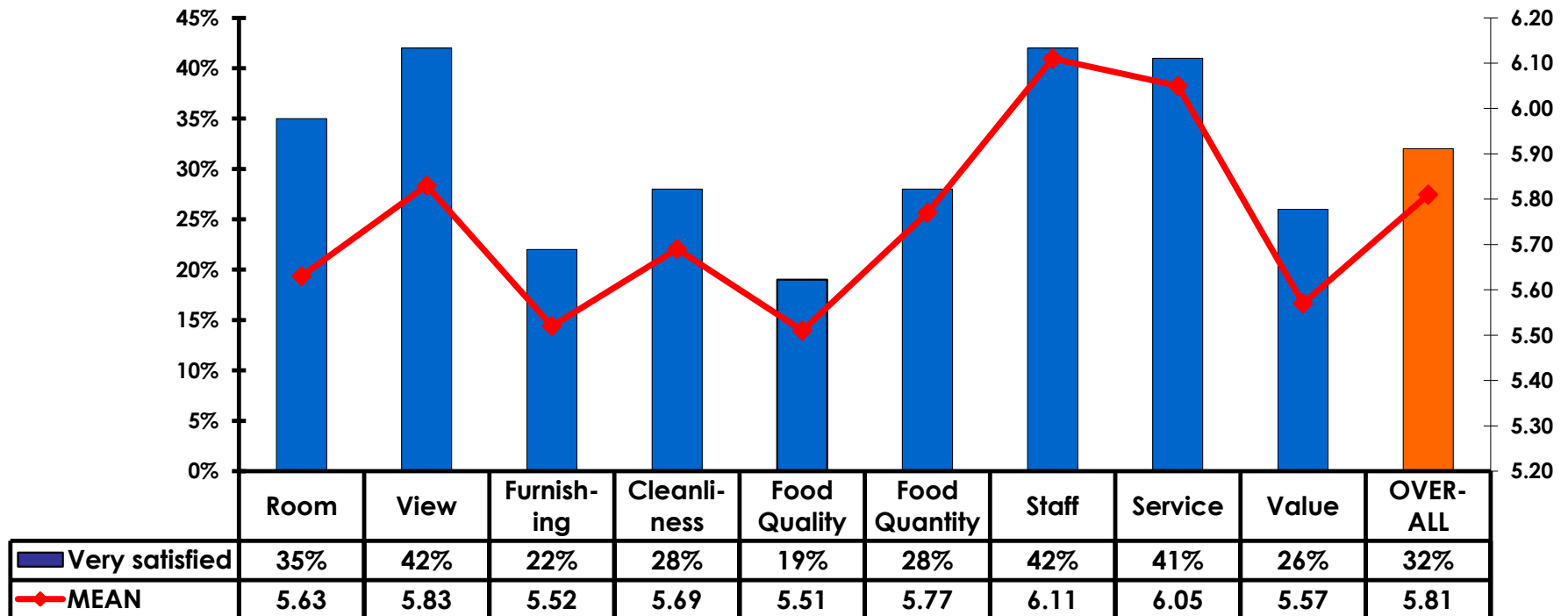
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

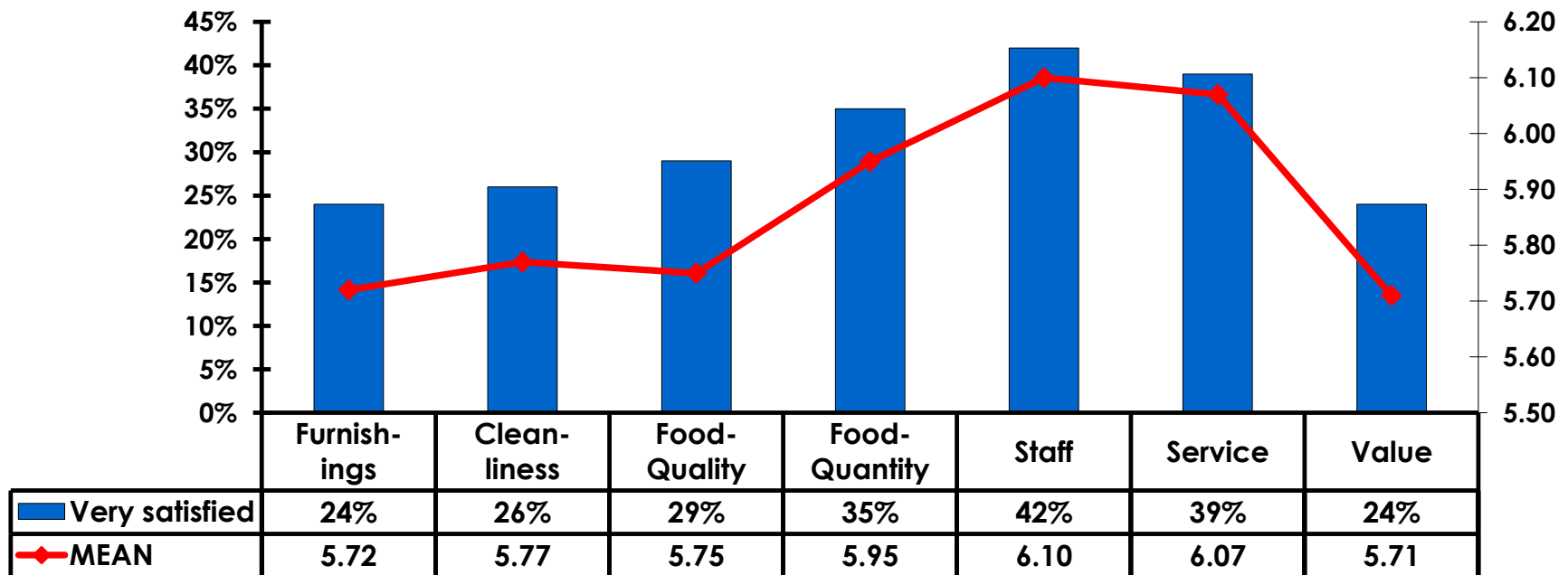
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

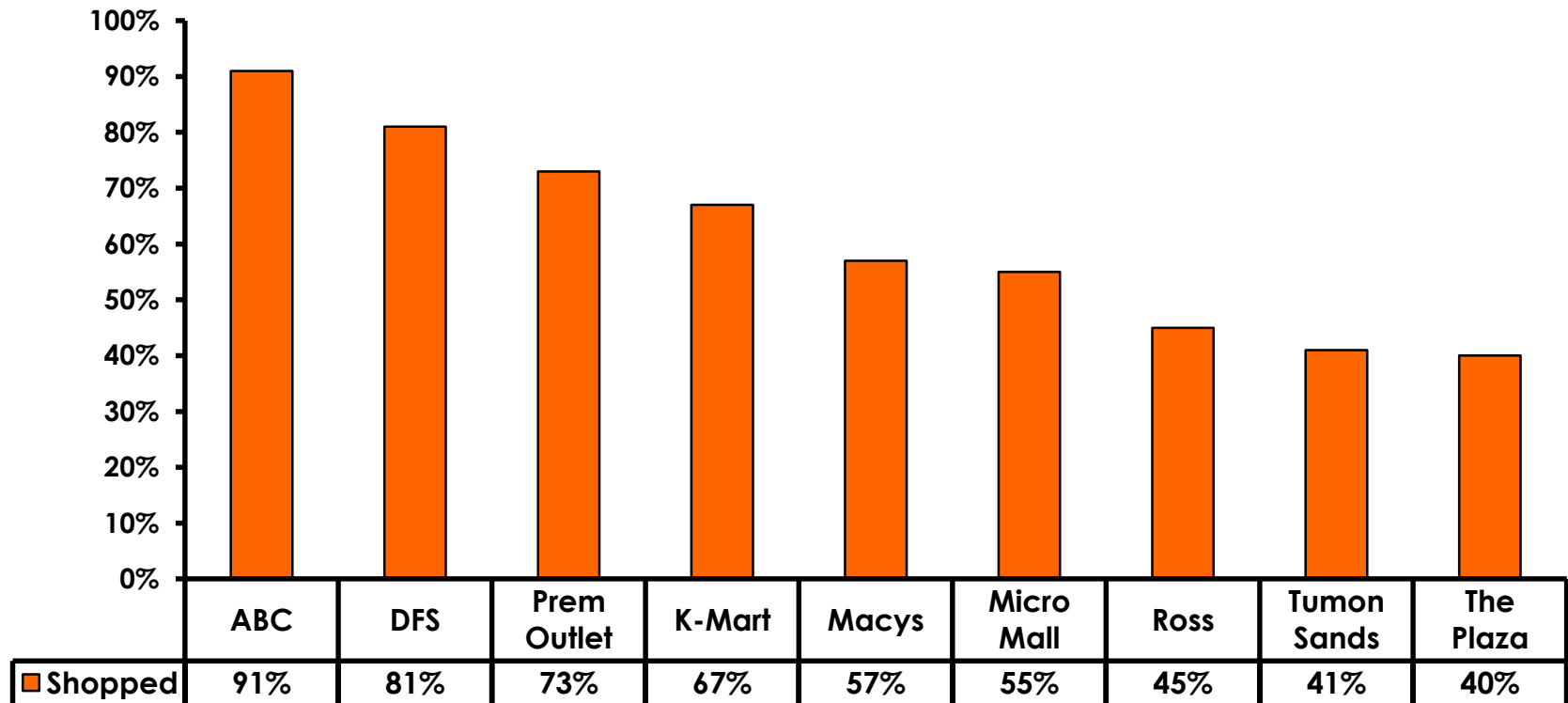
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



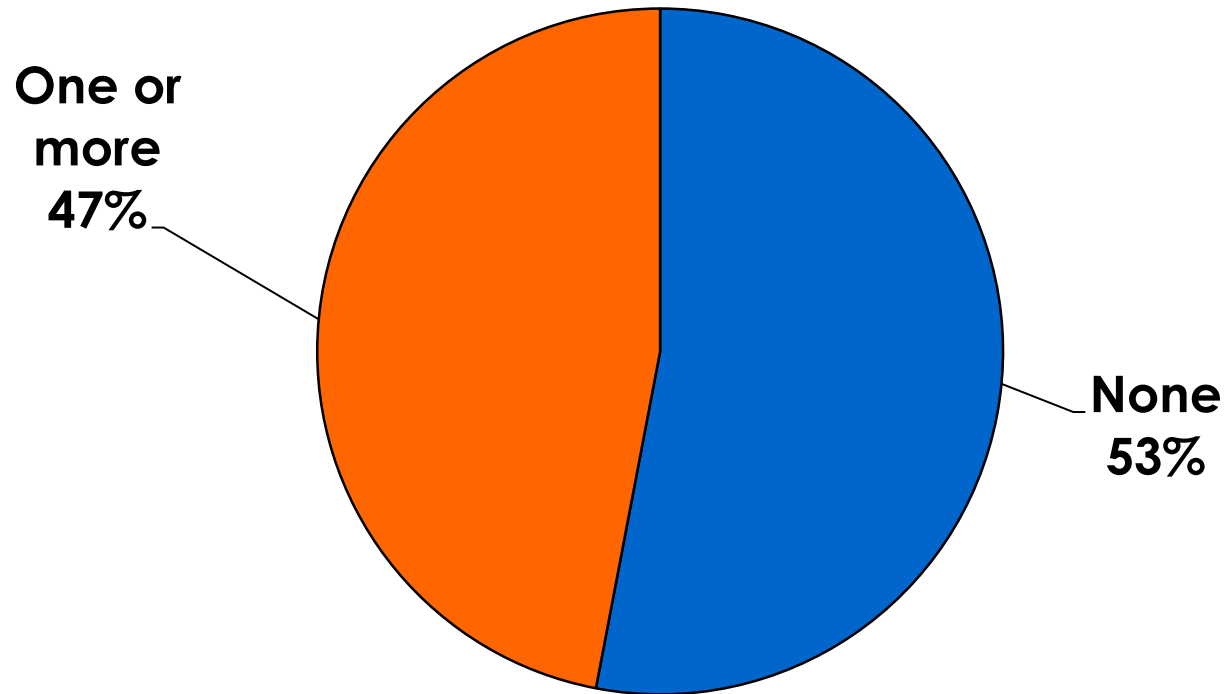
Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

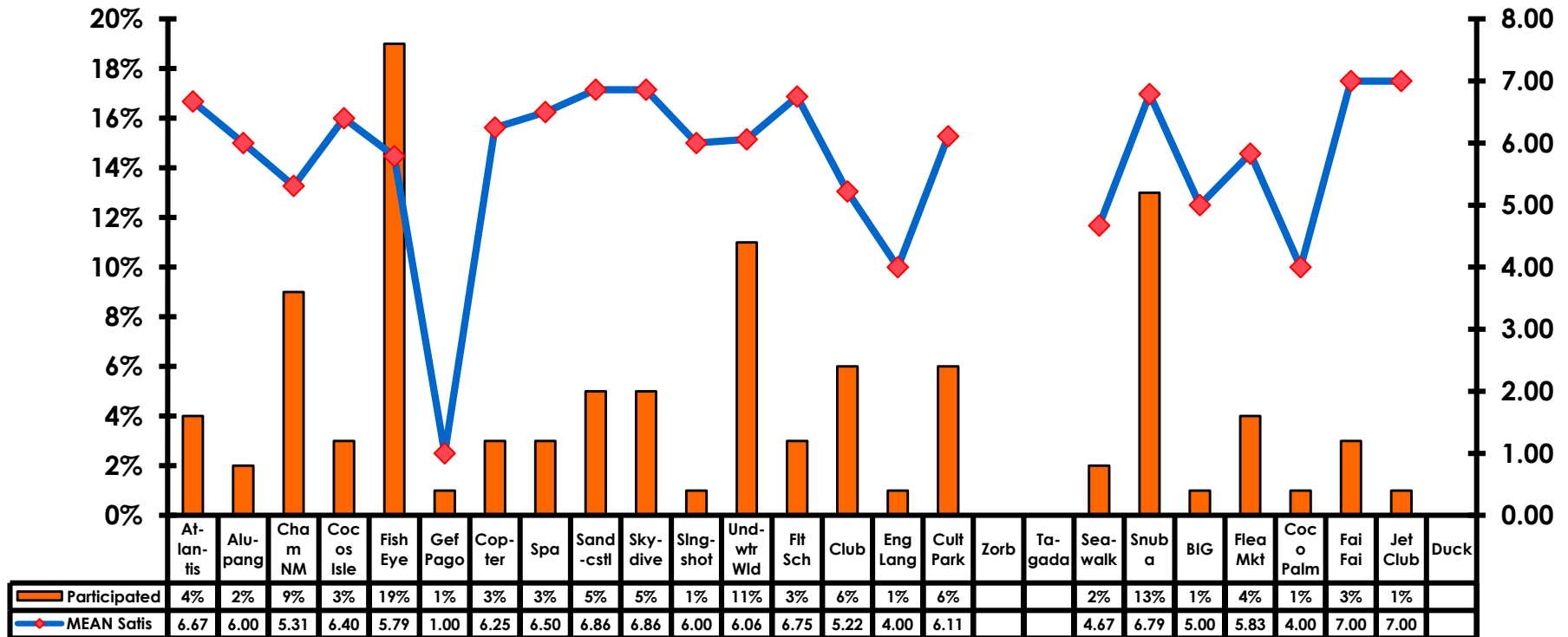
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 75%	Score of 6 to 7 = 67%
Score of 4 to 5 = 25%	Score of 4 to 5 = 31%
Score 1 to 3 = 1%	Score 1 to 3 = 2%
MEAN = 6.03	MEAN = 5.90

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 = 87%	Score of 6 to 7 = 80%
Score of 4 to 5 = 12%	Score of 4 to 5 = 19%
Score 1 to 3 = 1%	Score 1 to 3 = 2%
MEAN = 6.18	MEAN = 6.04

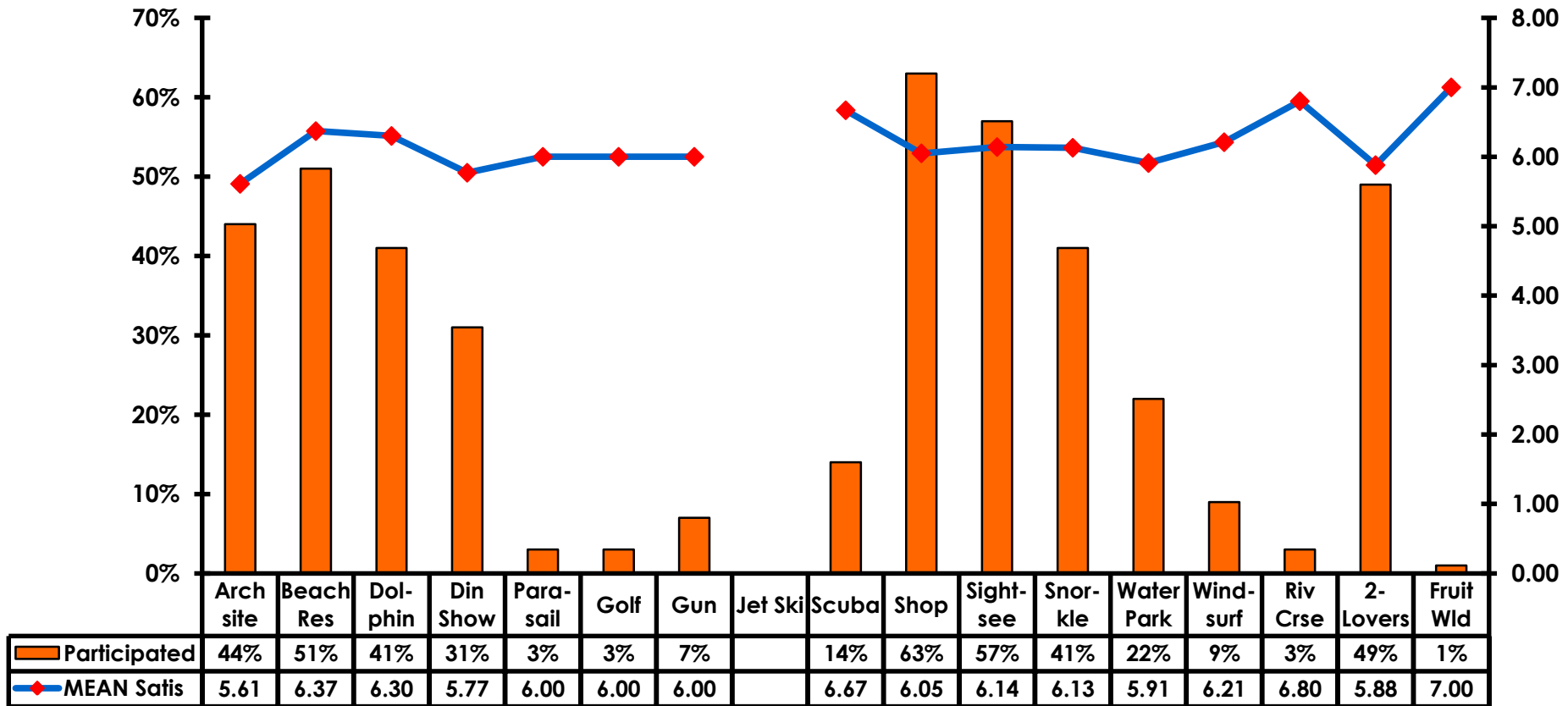
Night Tours Satisfaction

7pt Rating Scale

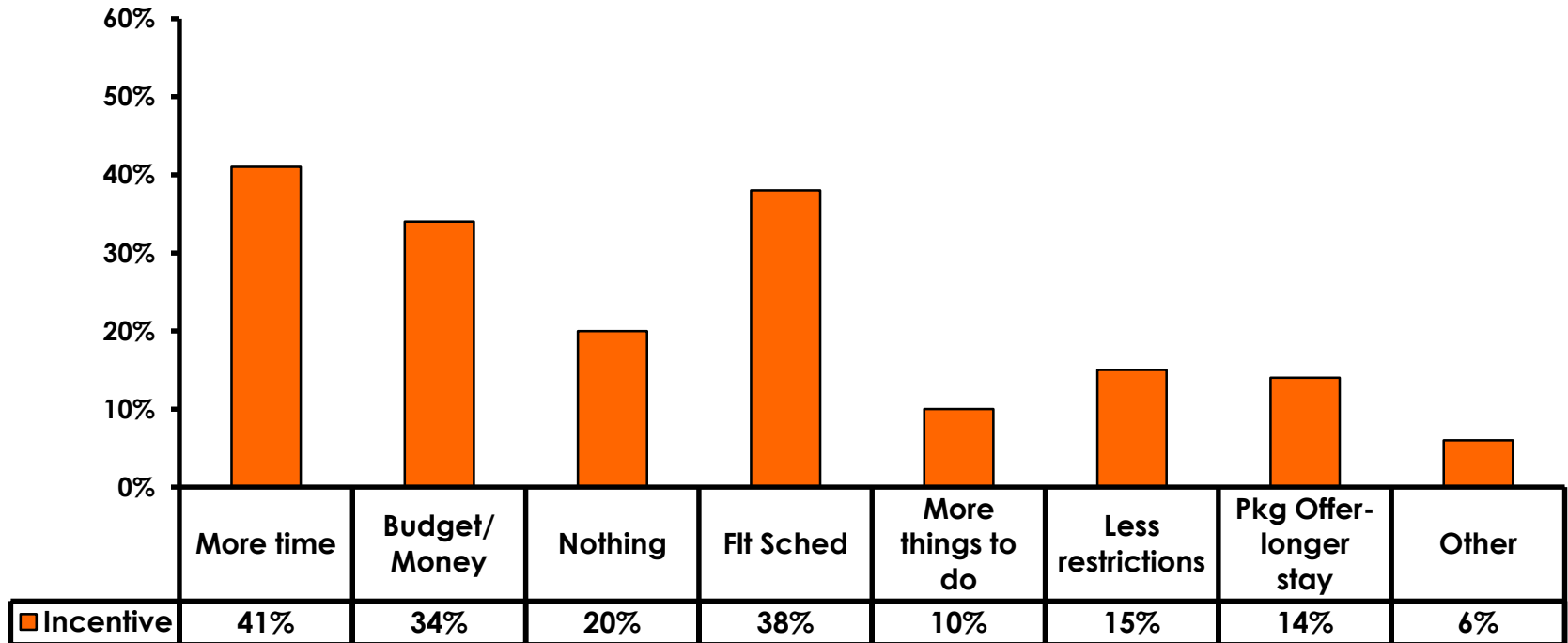
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 70%	Score of 6 to 7 = 65%
Score of 4 to 5 = 27%	Score of 4 to 5 = 32%
Score 1 to 3 = 3%	Score 1 to 3 = 3%
MEAN = 5.82	MEAN = 5.74

Satisfaction with Other Activities



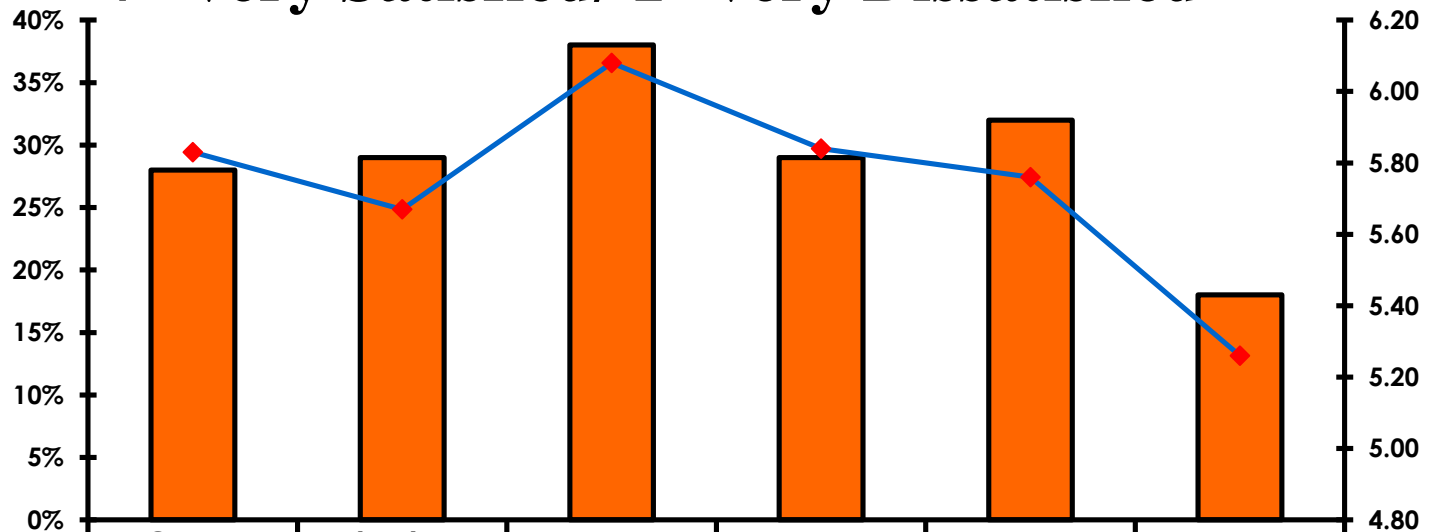
What would it take to make you want to stay an extra day in Guam?





On-Island Perceptions

7pt Rating Scale

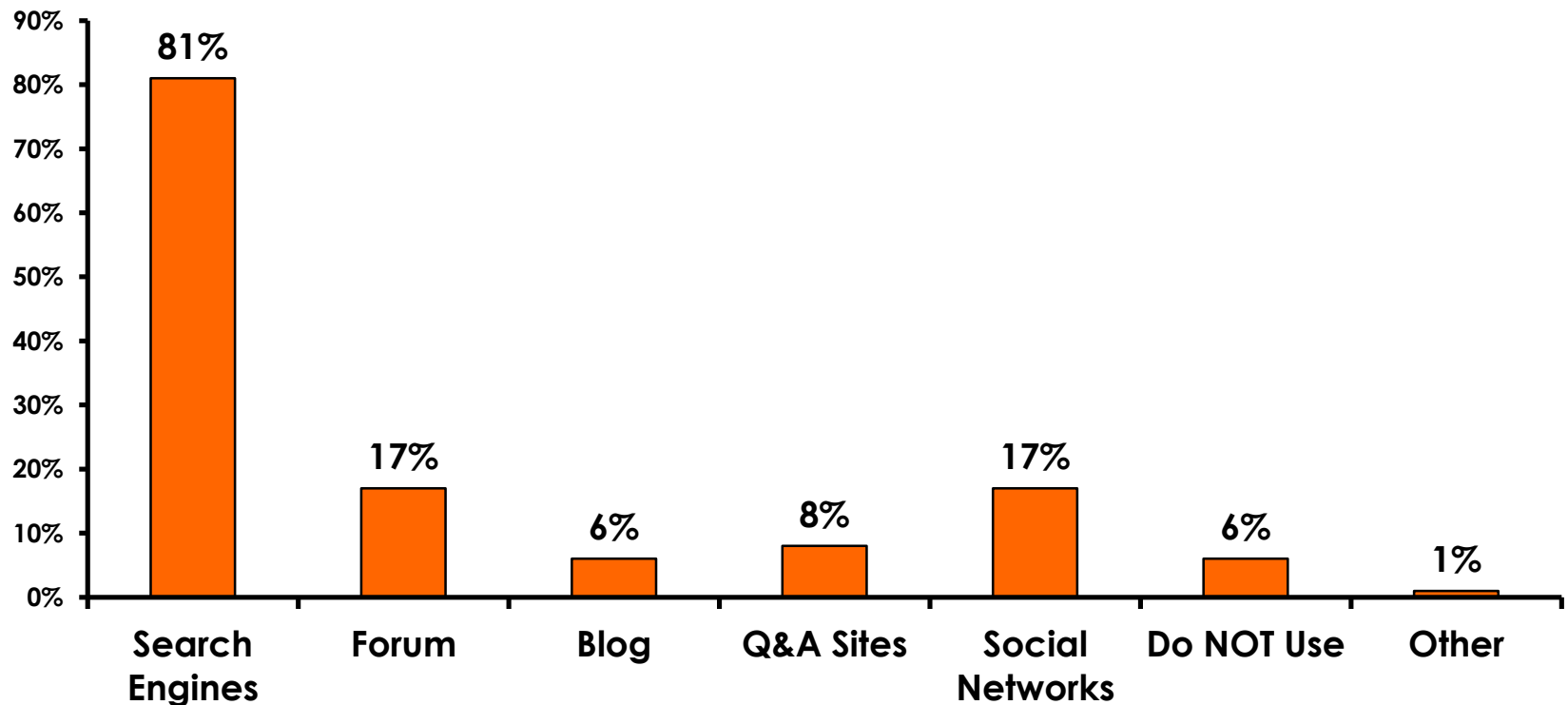
7=Very Satisfied/ 1=Very Dissatisfied



 Strongly agree	28%	29%	38%	29%	32%	18%
 MEAN	5.83	5.67	6.08	5.84	5.76	5.26

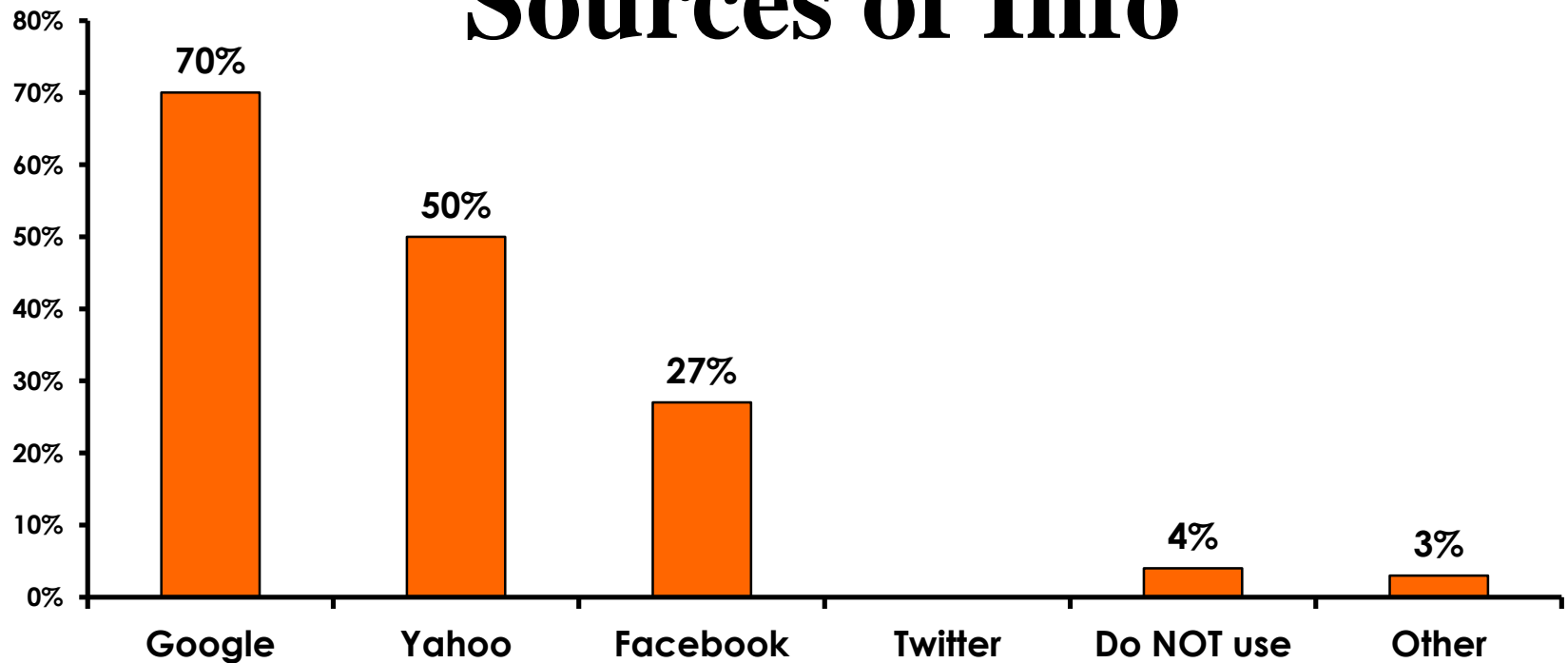
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

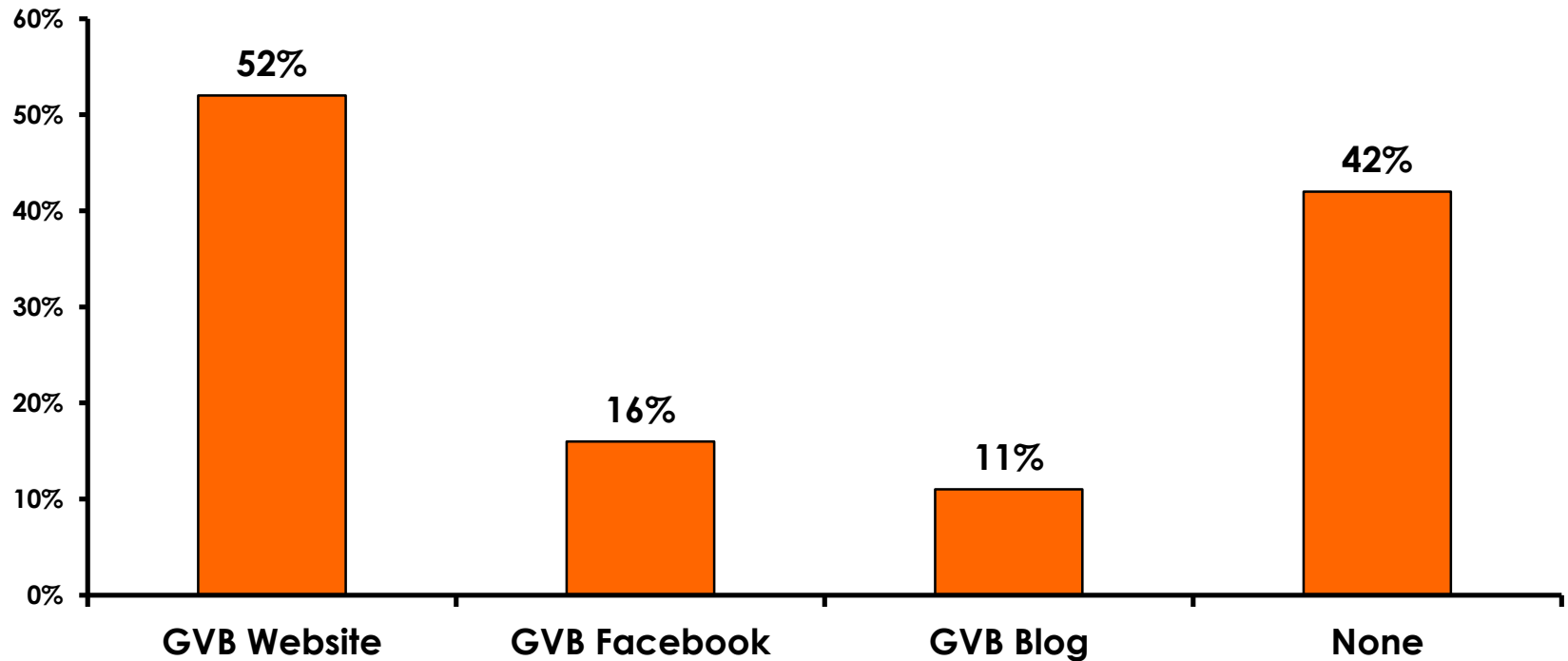


Internet- Things To Do

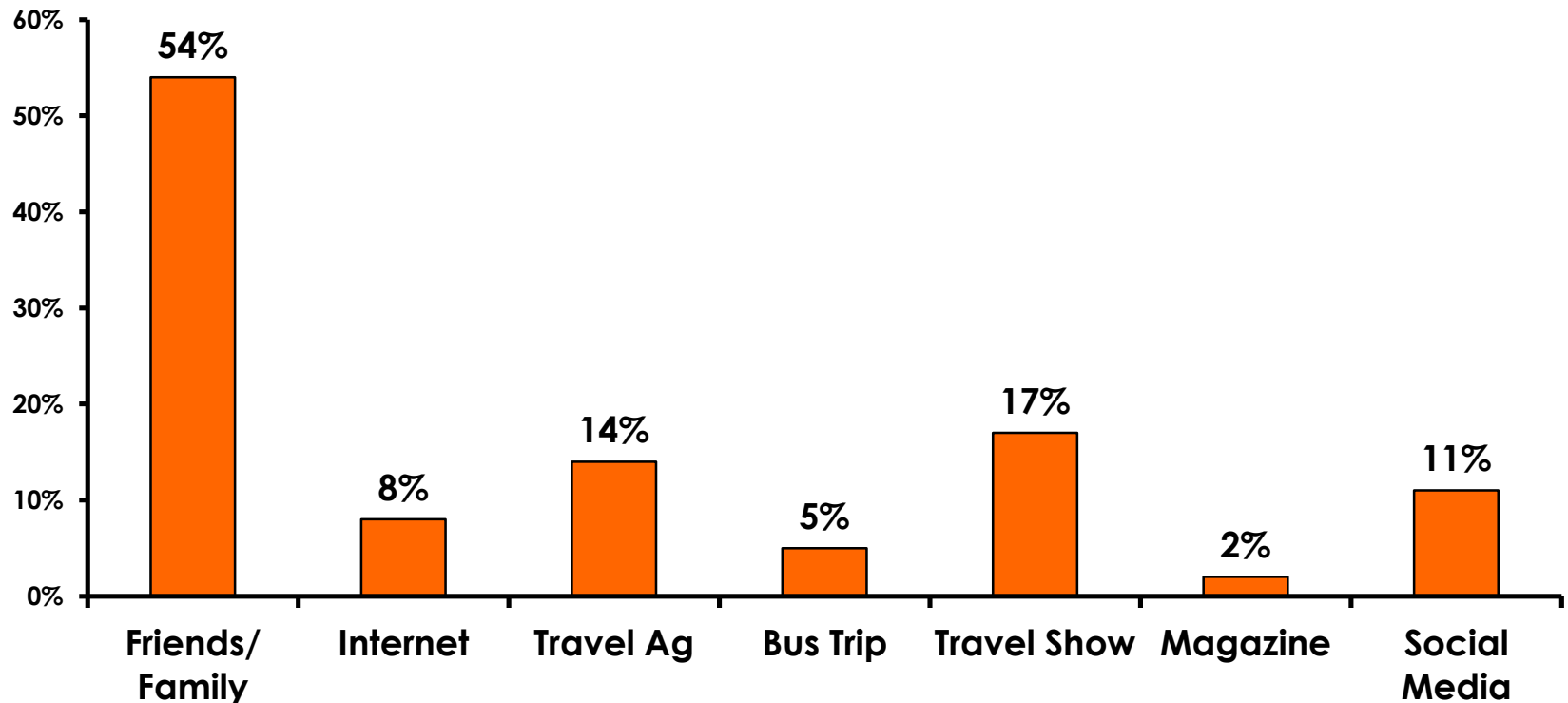
Sources of Info



Internet- GVB Sources

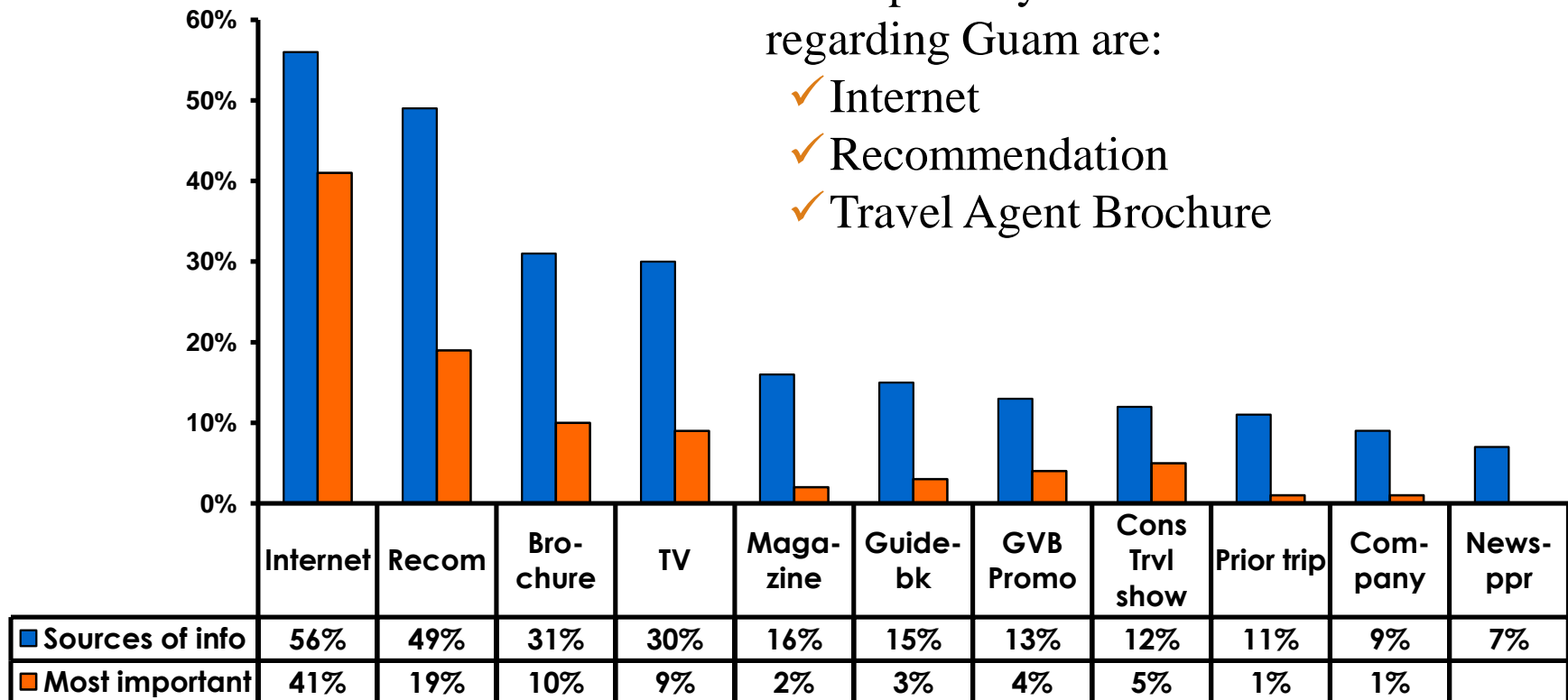


Travel Motivation- Info Sources



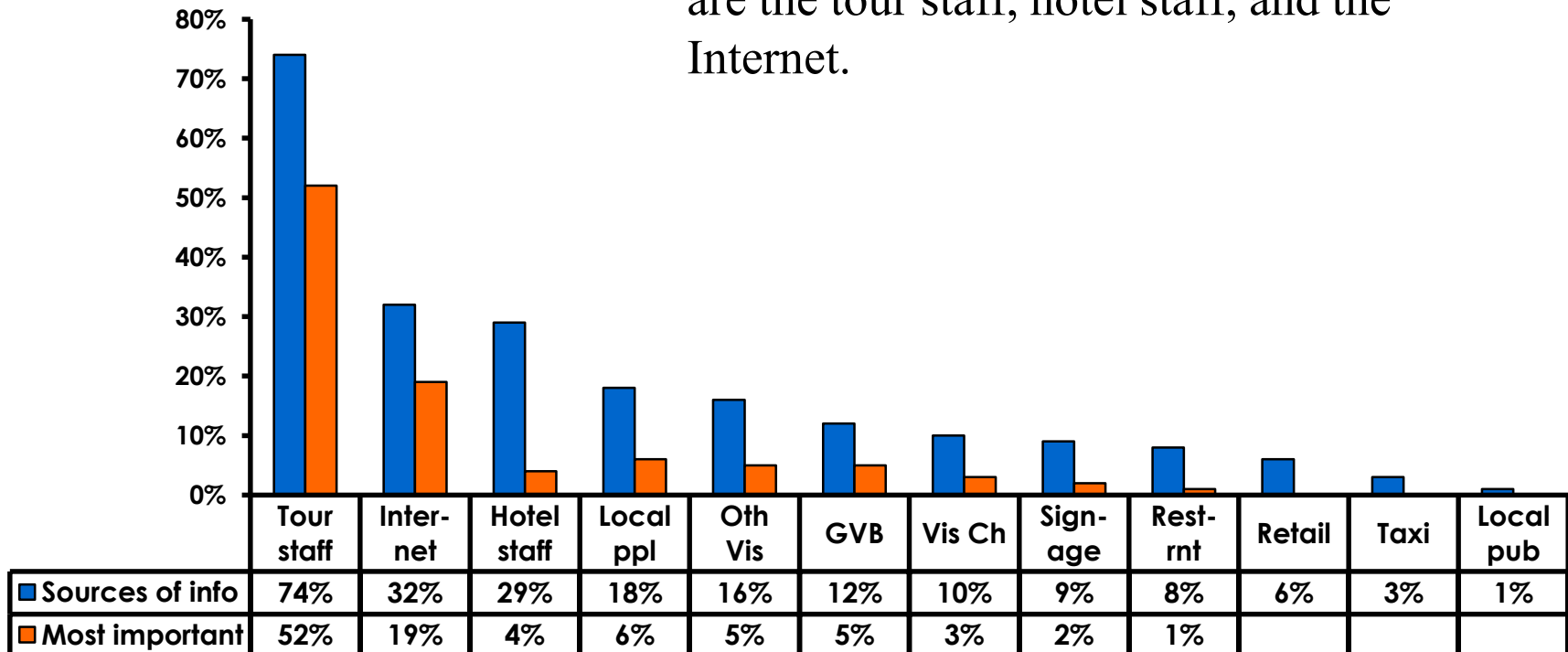
Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
 - ✓ Internet
 - ✓ Recommendation
 - ✓ Travel Agent Brochure



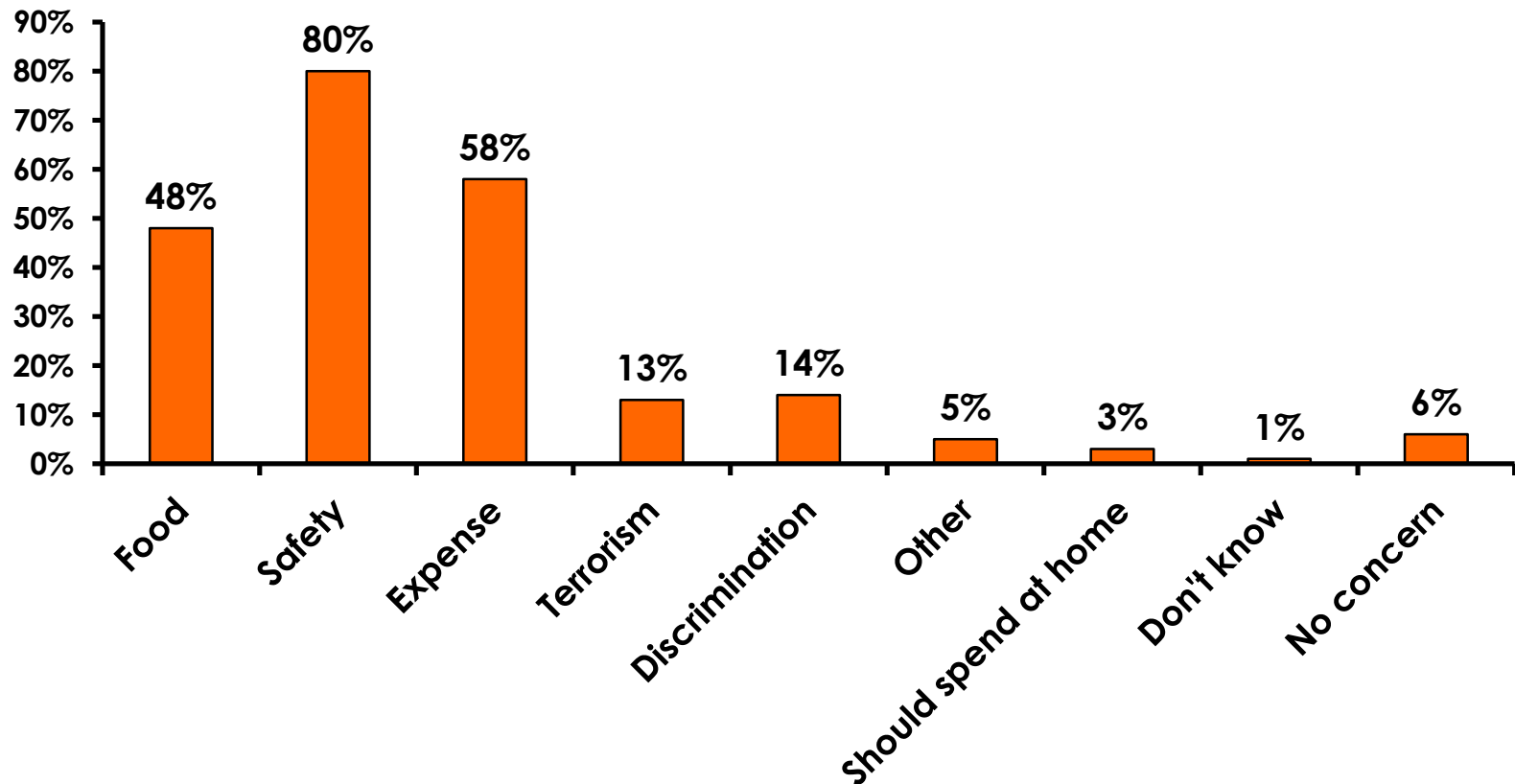
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

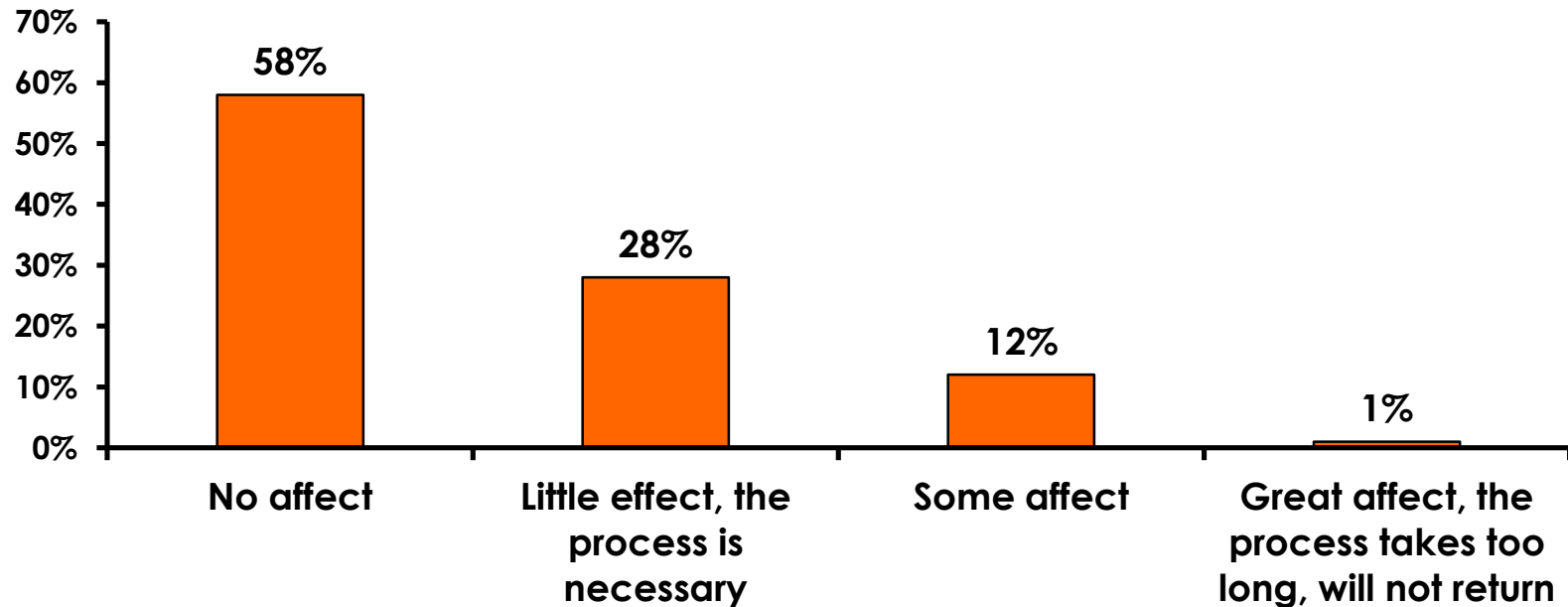
Concerns about travel outside of Taiwan - Overall



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	Safety	80%	85%	76%	84%	100%	86%	70%	86%	78%	70%	65%	96%	100%	
	Expense	58%	62%	63%	54%	22%	71%	60%	71%	63%	55%	41%	65%	40%	
	Food	48%	38%	49%	49%	44%	43%	50%	48%	44%	45%	53%	62%	40%	
	Discrimination against Taiwanese	14%	23%	15%	5%	22%	29%	10%	14%	11%	9%	24%	12%	40%	
	Terrorism	13%	23%	8%	19%	33%	14%	20%	24%	7%	15%		15%		
	No concerns	6%		5%	11%				5%	4%	18%	6%			
	Other	5%		7%	5%					4%	9%	24%			
	Should spend at home	3%		4%	3%			20%	5%		3%		4%		
	Don't know	1%		1%							3%				
	Total	Count	150	13	91	37	9	7	10	21	27	33	17	26	5

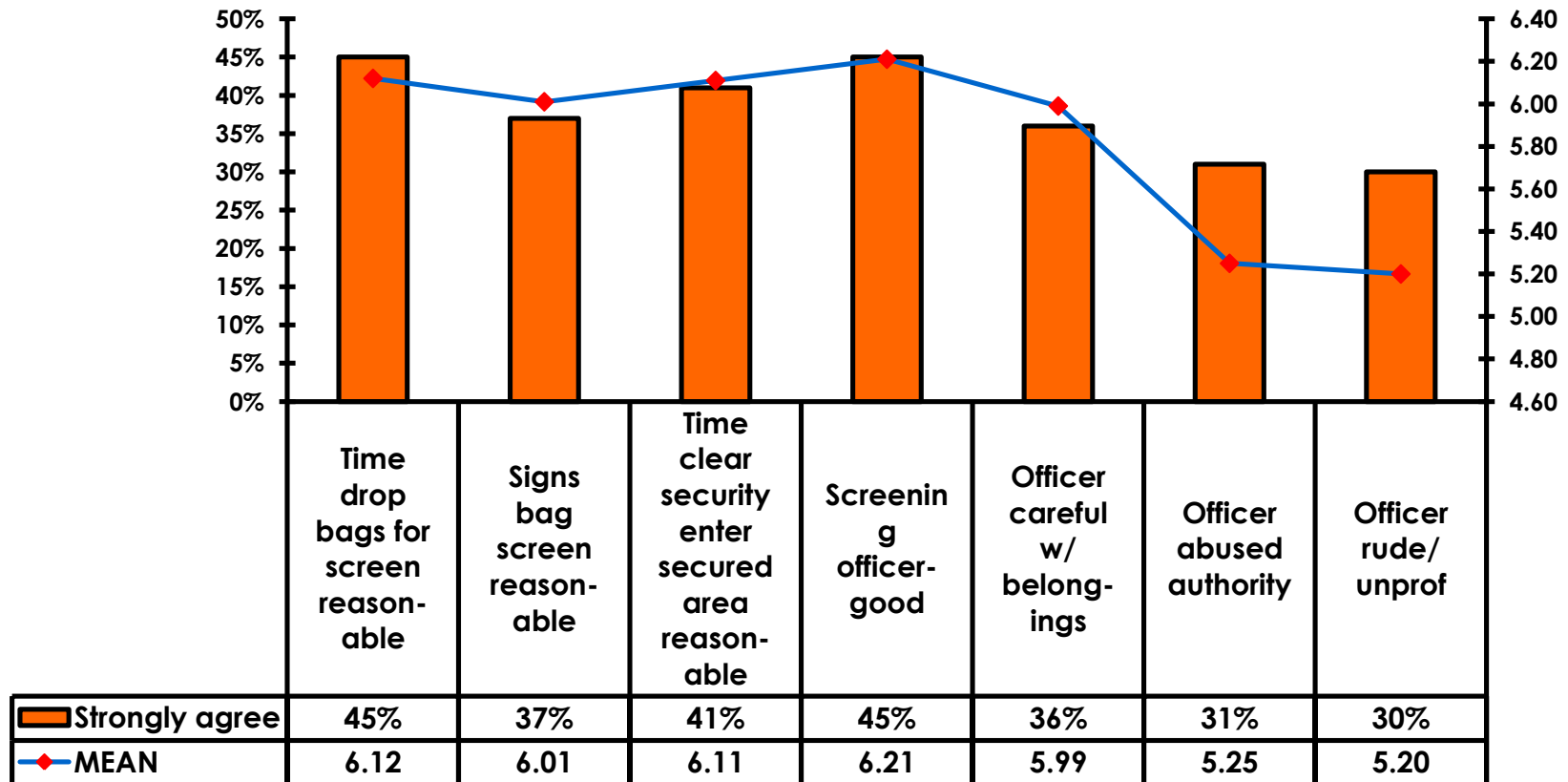
Security Screening/ Immigration Process at Guam International Airport



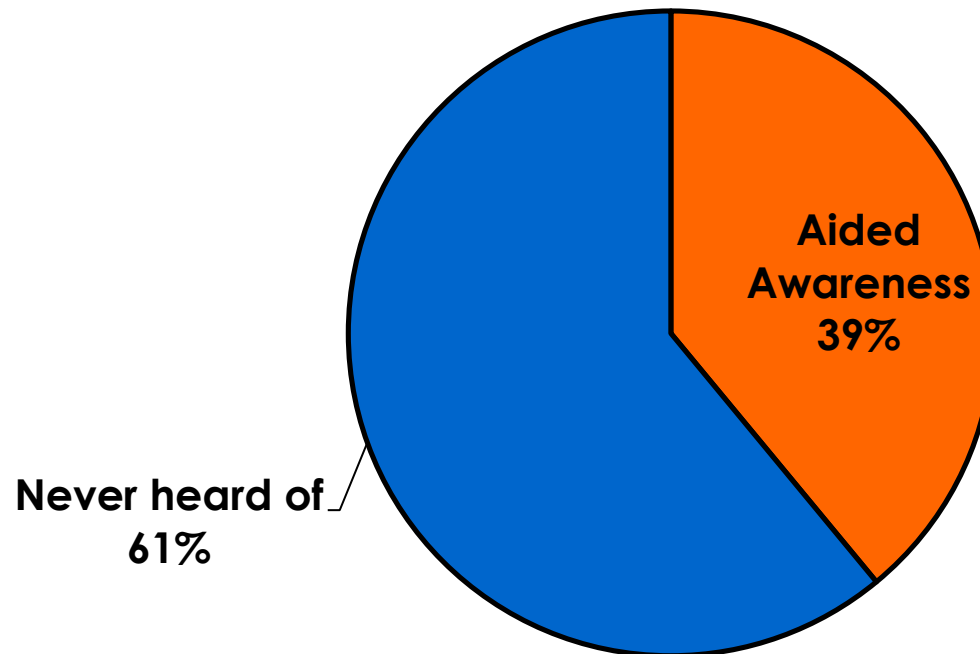
Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



Shop Guam Festival



Shop Guam Festival - Impact

n=55

