



GUAM VISITORS BUREAU

Taiwan Visitor Tracker Exit Profile

FY2015 Market Segmentation

2ND QTR. (JAN~MAR 2015)



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

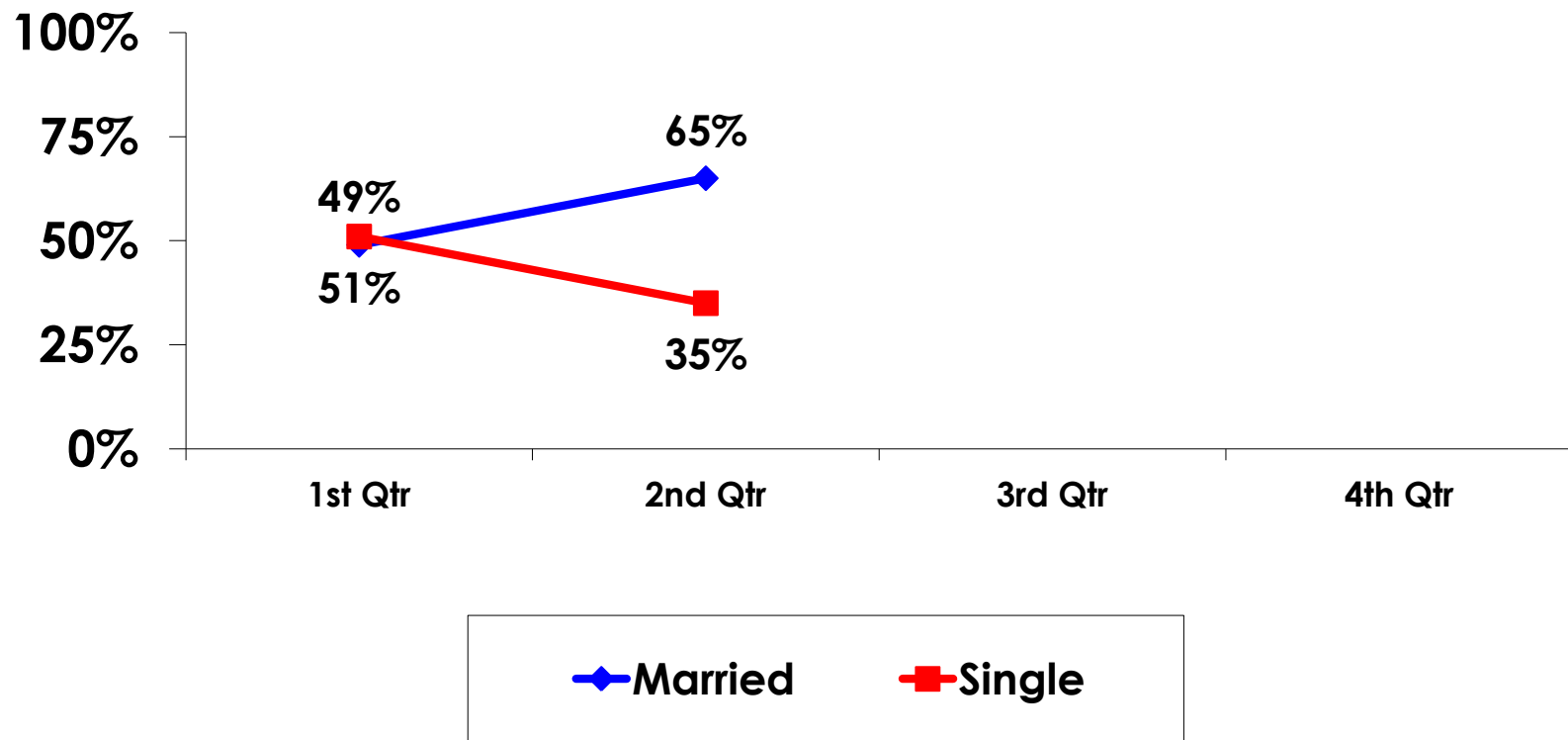
- General leisure group – Q.5A
- Family and/or Child – Q.6
- Special interest group – Q.18/Q7
- Incentive market – Q.5A/Q.7
- 20-40 year old – Q.F
- Mid-high level income – Q.26
- White-collar – Q.25
- W/child – Q.6
- Wedding/ Honeymoon – Q.5A/ Q.13
- Student –Q.25

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
General leisure group	50%	43%		
Child	9%	25%		
Incentive market	5%	-		
Male 20-40	36%	35%		
Female 20-40	48%	45%		
White collar	56%	57%		
Wedding/ Honeymooner	17%	25%		
Student	3%	9%		
Mid-High income	40%	29%		
TOTAL	150	150		

SECTION 1 **PROFILE OF RESPONDENTS**

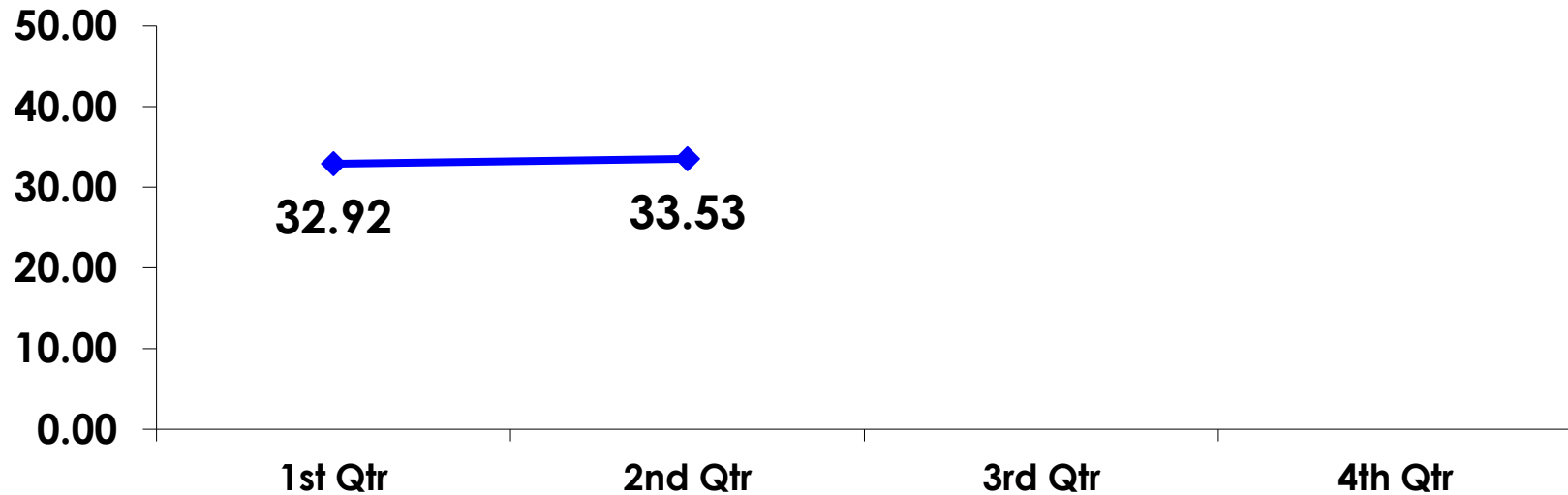
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-
QE	Married	Count	97	37	29	31	43	63	36	0	29
		Column N %	65%	57%	76%	58%	64%	74%	97%	0%	66%
	Single	Count	53	28	9	22	24	22	1	13	15
		Column N %	35%	43%	24%	42%	36%	26%	3%	100%	34%
Total		Count	150	65	38	53	67	85	37	13	44

AVERAGE AGE - TRACKING



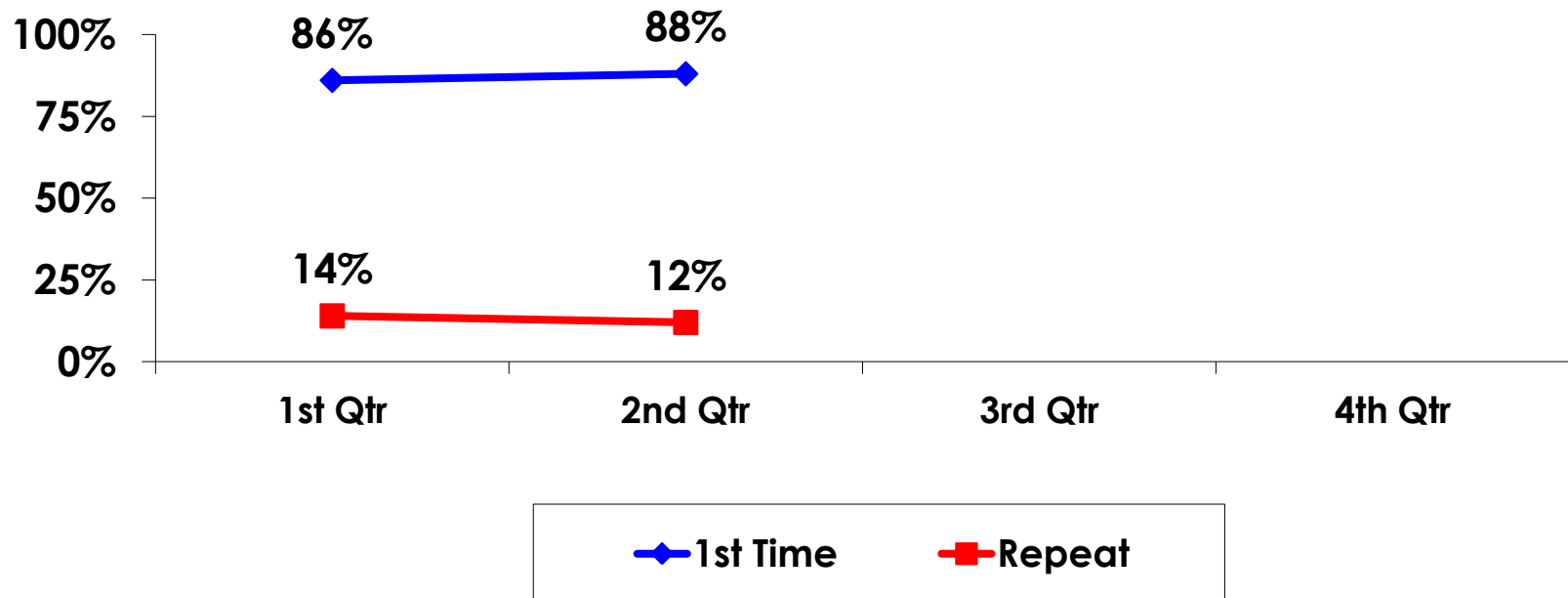
AGE- SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-
QF	18-24	Count	15	8	6	4	5	3	3	9	3
		Column N %	10%	12%	16%	8%	7%	4%	8%	69%	7%
	25-34	Count	73	33	10	31	42	43	22	4	25
		Column N %	49%	51%	26%	58%	63%	51%	59%	31%	57%
	35-49	Count	54	23	19	18	20	37	11	0	14
		Column N %	36%	35%	50%	34%	30%	44%	30%	0%	32%
	50+	Count	8	1	3	0	0	2	1	0	2
		Column N %	5%	2%	8%	0%	0%	2%	3%	0%	5%
	Total	Count	150	65	38	53	67	85	37	13	44
QF	Mean		33.53	31.95	34.97	31.60	30.76	34.20	32.32	21.08	33.43
	Median		32	31	37	32	29	33	31	20	32

INCOME - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-
Q26	<=NT160K	Count	10	4	1	0	8	5	2	2	0
		Column N %	7%	6%	3%	0%	12%	6%	6%	17%	0%
	NT160K-NT200K	Count	7	5	3	1	4	5	1	0	0
		Column N %	5%	8%	8%	2%	6%	6%	3%	0%	0%
	NT200K-NT400K	Count	19	11	5	5	12	9	4	2	0
		Column N %	13%	17%	14%	9%	18%	11%	11%	17%	0%
	NT400K-NT600K	Count	25	11	2	12	12	17	9	1	25
		Column N %	17%	17%	5%	23%	18%	20%	25%	8%	57%
	NT600K-NT800K	Count	19	5	3	9	6	14	5	0	19
		Column N %	13%	8%	8%	17%	9%	17%	14%	0%	43%
	NT800K-NT1.0M	Count	21	12	6	6	8	16	2	0	0
		Column N %	14%	19%	16%	11%	12%	19%	6%	0%	0%
	NT1.0M+	Count	36	12	14	17	12	17	10	3	0
		Column N %	24%	19%	38%	32%	18%	20%	28%	25%	0%
	No Income	Count	10	4	3	3	3	1	3	4	0
		Column N %	7%	6%	8%	6%	5%	1%	8%	33%	0%
Total	Count	147	64	37	53	65	84	36	12	44	

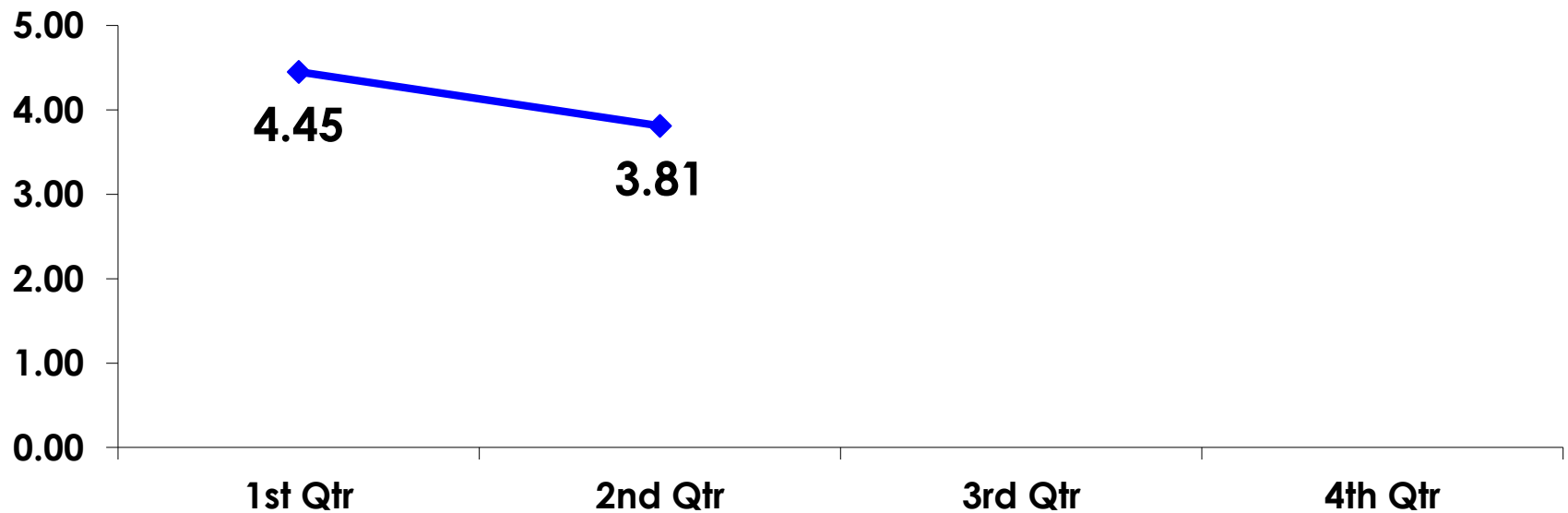
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	131	57	32	50	57	76	36	11	40
		Column N %	88%	88%	86%	94%	85%	89%	97%	92%	91%
	No	Count	18	8	5	3	10	9	1	1	4
		Column N %	12%	12%	14%	6%	15%	11%	3%	8%	9%
Total		Count	149	65	37	53	67	85	37	12	44

AVG LENGTH OF STAY - TRACKING



AVG LENGTH OF STAY - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-
Q8	Mean	3.81	3.90	3.83	3.92	3.70	3.73	3.77	4.58	3.79
	Median	4	4	4	4	4	4	4	4	4

SECTION 2 **TRAVEL PLANNING**

TRAVEL PLANNING - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-
Q7	Full package tour	Count	49	22	14	18	20	27	13	4	13
		Column N %	33%	34%	37%	34%	30%	32%	35%	31%	30%
	Free-time package tour	Count	87	40	20	29	44	52	24	7	26
		Column N %	58%	62%	53%	55%	66%	61%	65%	54%	59%
	Individually arranged travel (FIT)	Count	7	2	2	2	2	1	0	2	3
		Column N %	5%	3%	5%	4%	3%	1%	0%	15%	7%
	Group tour	Count	4	1	1	4	0	3	0	0	2
		Column N %	3%	2%	3%	8%	0%	4%	0%	0%	5%
	Other	Count	2	0	1	0	1	2	0	0	0
		Column N %	1%	0%	3%	0%	1%	2%	0%	0%	0%
	Total	Count	149	65	38	53	67	85	37	13	44

TRAVEL MOTIVATION - SEGMENTATION

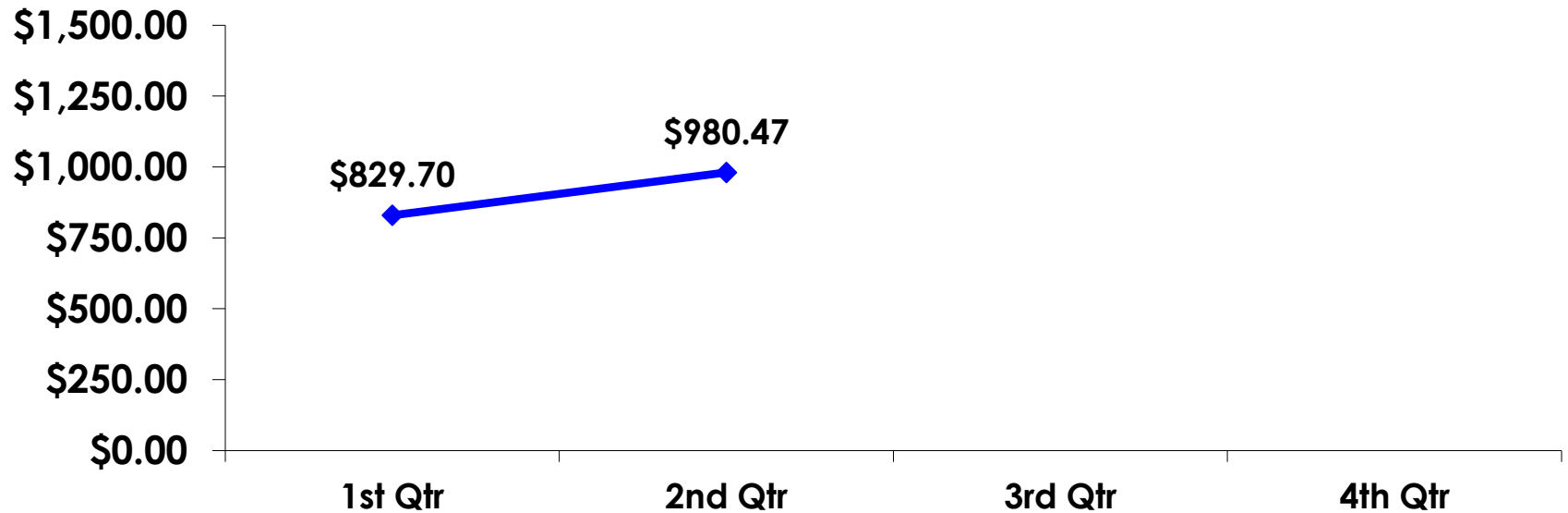
		TOTAL	GEN LEISURE GRP	CHILD	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME	
		-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	9%	8%	8%	4%	13%	8%	0%	0%	9%	
	Price	17%	17%	16%	9%	16%	13%	16%	23%	14%	
	Visit friends/ Relatives	4%	5%	5%	2%	4%	2%	11%	15%	0%	
	Recomm- friend/family/trvl agnt	31%	28%	24%	30%	33%	28%	19%	38%	41%	
	Scuba	23%	25%	11%	23%	31%	25%	22%	31%	20%	
	Water sports	25%	31%	24%	25%	27%	22%	19%	38%	23%	
	Short travel time	7%	9%	0%	4%	13%	8%	11%	0%	7%	
	Golf	1%	0%	0%	4%	0%	1%	3%	0%	2%	
	Relax	41%	95%	47%	38%	46%	40%	30%	62%	34%	
	Company/ Business Trip	2%	0%	0%	4%	1%	2%	0%	0%	2%	
	Safe	27%	45%	26%	19%	28%	26%	22%	38%	18%	
	Natural beauty	73%	86%	79%	68%	76%	75%	68%	92%	61%	
	Shopping	38%	49%	26%	38%	40%	39%	38%	62%	36%	
	Married/ Attn wedding	9%	6%	16%	6%	10%	9%	35%	0%	2%	
	Honeymoon	17%	14%	3%	21%	22%	20%	70%	0%	30%	
	Pleasure	6%	14%	16%	4%	4%	4%	3%	46%	2%	
	No Visa requirement	21%	25%	8%	13%	30%	22%	19%	8%	14%	
	Other	1%	0%	0%	0%	1%	1%	0%	0%	2%	
	Total	Count	150	65	38	53	67	85	37	13	44

INFORMATION SOURCES - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME	
		-	-	-	-	-	-	-	-	-	
Q1	Internet	58%	62%	63%	53%	63%	61%	68%	46%	64%	
	Friend/ Relative	39%	42%	39%	42%	39%	36%	46%	77%	32%	
	Travel Agent Brochure	39%	35%	39%	38%	36%	42%	51%	31%	41%	
	TV	21%	18%	26%	19%	22%	15%	16%	38%	16%	
	Travel Guidebook-Bookstore	21%	31%	13%	23%	22%	24%	19%	15%	18%	
	Prior Trip	11%	12%	8%	6%	15%	11%	3%	8%	9%	
	Magazine (Consumer)	9%	9%	16%	8%	10%	8%	11%	23%	14%	
	Travel Trade Show	9%	8%	8%	8%	12%	11%	22%	0%	14%	
	GVB Promo	8%	8%	11%	6%	10%	9%	8%	0%	5%	
	Co-Worker/ Company Trvl Dept	8%	9%	8%	9%	9%	11%	3%	0%	9%	
	Consumer Trvl Show	6%	3%	5%	6%	6%	4%	8%	0%	5%	
	GVB Office	3%	6%	3%	4%	3%	2%	3%	0%	0%	
	Newspaper	3%	2%	0%	6%	1%	1%	5%	0%	5%	
	Other	1%	0%	0%	2%	1%	2%	0%	0%	2%	
	Total	Count	150	65	38	53	67	85	37	13	44

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$905.08

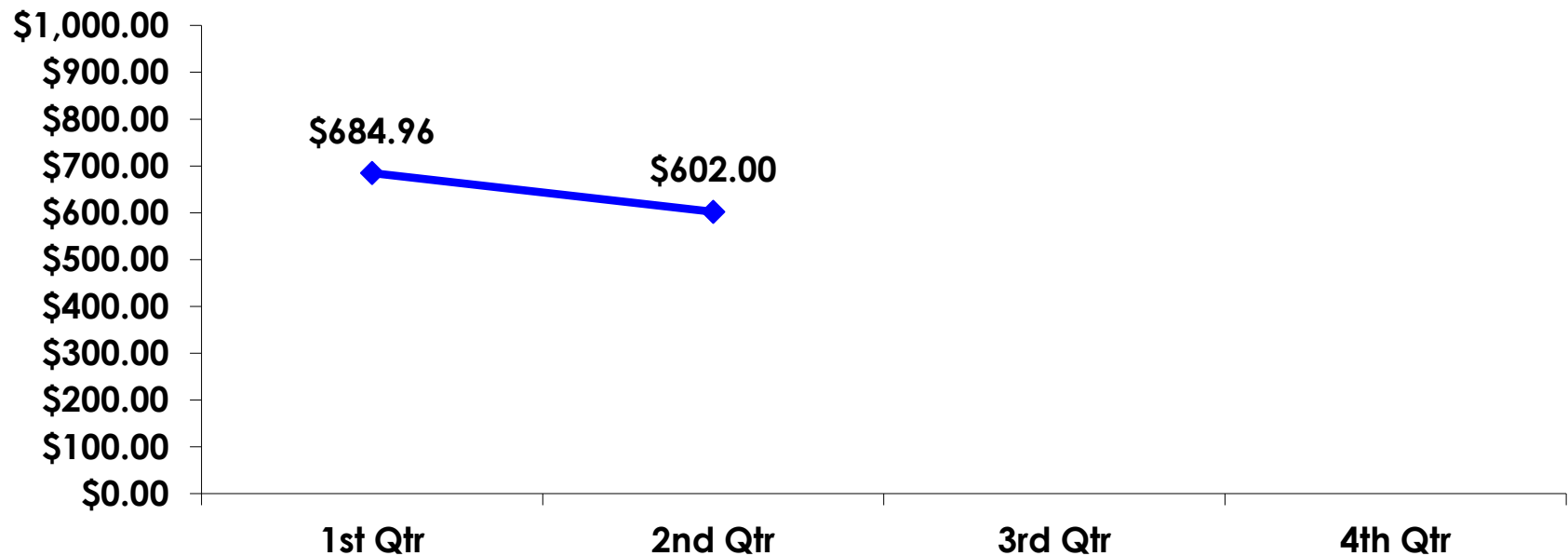
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$980.47	\$971.29	\$777.09	\$904.15	\$934.99	\$1,154.58	\$1,026.26	\$208.08	\$919.63
	Median	\$832	\$783	\$671	\$789	\$789	\$947	\$789	\$0	\$1,010
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$10,294	\$10,294	\$5,526	\$3,158	\$4,105	\$10,294	\$3,158	\$1,316	\$2,631

PREPAID EXPENDITURES

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,188.38	\$1,161.15	\$2,762.87	.	\$1,235.54	\$1,128.83	\$1,118.57	\$1,277.76	\$694.66	\$880.96
	Minimum	\$347	\$347	\$789	.	\$347	\$347	\$347	\$347	\$632	\$347
	Maximum	\$5,684	\$2,368	\$5,684	.	\$5,684	\$2,210	\$5,684	\$2,368	\$758	\$1,263
AIR/ HOTEL/ MEAL	Mean	\$2,490.61	\$2,008.55	\$5,368.65	.	\$1,872.83	\$2,701.85	\$2,863.56	\$1,373.22	\$3,789.07	\$1,997.57
	Minimum	\$489	\$581	\$1,263	.	\$632	\$632	\$581	\$489	\$3,789	\$663
	Maximum	\$37,891	\$10,294	\$37,891	.	\$7,894	\$37,891	\$37,891	\$2,463	\$3,789	\$7,894
AIR ONLY	Mean	\$1,270.92	\$363.12	\$2,178.72	.	.	\$363.12	.	.	.	\$2,178.72
	Minimum	\$363	\$363	\$2,179	.	.	\$363	.	.	.	\$2,179
	Maximum	\$2,179	\$363	\$2,179	.	.	\$363	.	.	.	\$2,179
HOTEL ONLY	Mean	.	.	.	.	.	.	.	.	.	.
	Minimum	.	.	.	.	.	.	.	.	.	.
	Maximum	.	.	.	.	.	.	.	.	.	.
HOTEL & MEAL	Mean	.	.	.	.	.	.	.	.	.	.
	Minimum	.	.	.	.	.	.	.	.	.	.
	Maximum	.	.	.	.	.	.	.	.	.	.
F&B HOTEL	Mean	.	.	.	.	.	.	.	.	.	.
	Minimum	.	.	.	.	.	.	.	.	.	.
	Maximum	.	.	.	.	.	.	.	.	.	.
TRANS- TAIWAN	Mean	\$127.36	\$154.09	\$151.56	.	\$117.62	\$189.45	\$125.25	\$69.47	\$157.88	\$69.47
	Minimum	\$16	\$63	\$76	.	\$16	\$158	\$63	\$63	\$158	\$63
	Maximum	\$316	\$316	\$221	.	\$316	\$221	\$316	\$76	\$158	\$76
TRANS- GUAM	Mean	\$72.62	\$85.25	\$157.88	.	\$12.63	\$47.36	\$72.62	.	.	\$12.63
	Minimum	\$13	\$13	\$158	.	\$13	\$47	\$13	.	.	\$13
	Maximum	\$158	\$158	\$158	.	\$13	\$47	\$158	.	.	\$13
OPT TOURS	Mean	\$926.60	\$629.41	\$2,526.05	.	\$305.23	\$1,103.04	\$939.55	\$580.99	.	\$489.42
	Minimum	\$95	\$158	\$1,579	.	\$95	\$783	\$95	\$95	.	\$95
	Maximum	\$3,473	\$947	\$3,473	.	\$947	\$1,263	\$3,473	\$1,263	.	\$1,263
OTHER	Mean	\$1,176.13	\$934.64	\$1,738.24	.	\$1,085.15	\$1,314.67	\$1,037.35	\$1,507.74	.	\$598.88
	Minimum	\$25	\$95	\$632	.	\$25	\$95	\$25	\$316	.	\$25
	Maximum	\$5,368	\$2,280	\$2,526	.	\$5,368	\$4,421	\$4,421	\$4,421	.	\$1,421
TOTAL	Mean	\$1,548.43	\$1,375.87	\$2,043.28	.	\$1,471.72	\$1,409.73	\$1,745.28	\$1,569.22	\$410.48	\$1,347.85
	Minimum	\$0	\$0	\$0	.	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$10,294	\$10,294	\$6,315	.	\$7,894	\$6,315	\$10,294	\$6,315	\$3,947	\$7,894

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$643.48

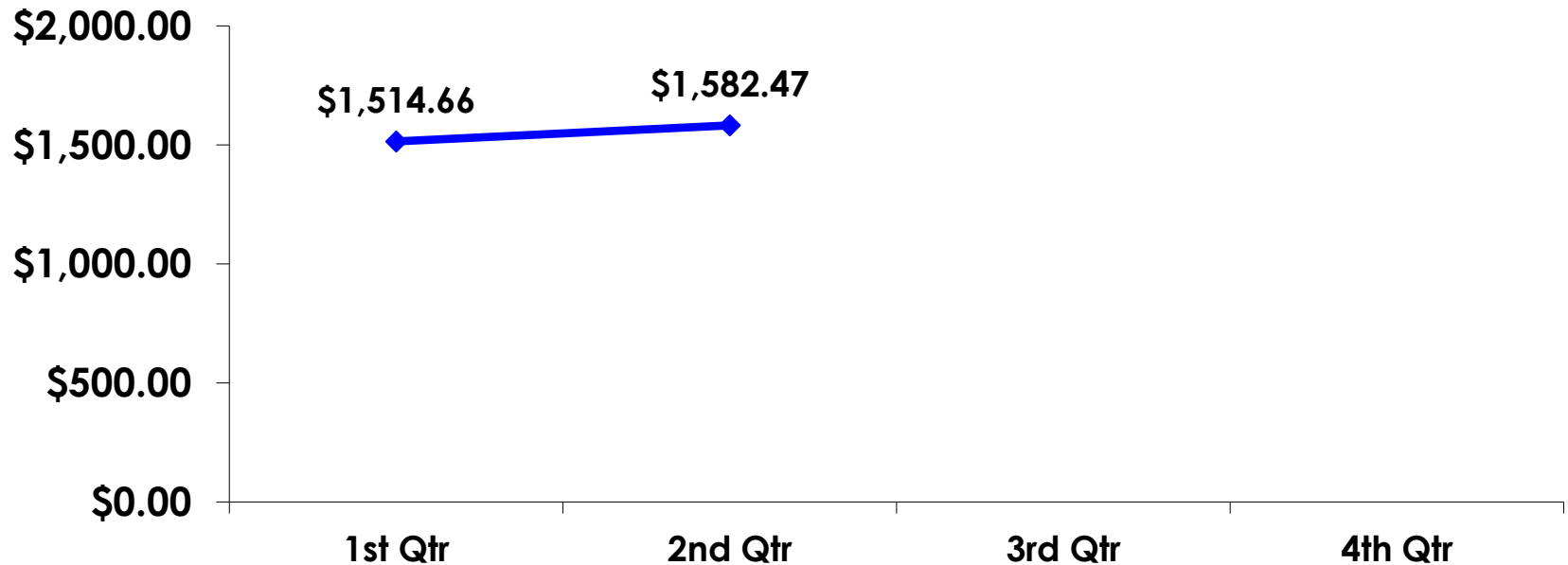
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$602.00	\$460.90	\$422.63	\$601.21	\$665.20	\$598.77	\$674.70	\$411.32	\$736.89
	Median	\$400	\$400	\$300	\$495	\$500	\$400	\$400	\$350	\$600
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$2,862	\$1,640	\$2,250	\$2,500	\$2,862	\$2,862	\$2,862	\$1,100	\$2,862

ON-ISLAND EXPENSE- BREAKDOWN

	TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
	-	-	-	-	-	-	-	-	-	-
	Mean	Mean	Mean	Mean	Mean	Mean	Mean	Mean	Mean	Mean
F&B HOTEL	\$21.75	\$24.09	\$28.68	.	\$16.89	\$12.60	\$13.15	\$11.38	\$50.00	\$31.30
F&B FF/STORE	\$43.77	\$52.95	\$50.79	.	\$29.72	\$60.45	\$41.49	\$43.57	\$25.23	\$32.61
F&B RESTRNT	\$83.39	\$88.23	\$94.87	.	\$78.68	\$74.10	\$83.82	\$115.92	\$74.23	\$84.20
OPT TOUR	\$115.96	\$113.22	\$106.71	.	\$111.15	\$140.87	\$97.82	\$145.19	\$180.46	\$162.27
GIFT- SELF	\$186.91	\$114.80	\$220.29	.	\$168.15	\$176.39	\$197.88	\$197.73	\$49.85	\$186.07
GIFT- OTHER	\$97.95	\$111.66	\$115.87	.	\$76.55	\$128.39	\$127.75	\$110.11	\$47.92	\$113.86
TRANS	\$43.06	\$37.57	\$33.32	.	\$29.40	\$58.82	\$45.61	\$104.43	\$37.08	\$39.64
OTHER	\$342.55	\$146.85	\$308.05	.	\$388.98	\$399.49	\$323.85	\$477.76	\$83.31	\$336.32
TOTAL	\$932.33	\$688.06	\$966.34	.	\$899.51	\$1,044.39	\$928.92	\$1,209.59	\$548.08	\$977.18

TOTAL EXPENDITURES – TRACKING



YTD=\$1,548.56

TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$1,582.47	\$1,432.19	\$1,199.72	\$1,505.36	\$1,600.19	\$1,753.35	\$1,700.97	\$619.40	\$1,656.52
	Median	\$1,302	\$1,180	\$1,083	\$1,360	\$1,300	\$1,494	\$1,267	\$350	\$1,510
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$10,694	\$10,694	\$5,719	\$5,658	\$5,658	\$10,694	\$5,658	\$2,012	\$4,678

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 ($p < .05$) 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, 2nd Qtr and Overall 1-2 Qtr 2015			
	1st Qtr	2nd Qtr	Combin ed 1-2 Qtr 2015
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks			
Ease of getting around			
Safety walking around at night			
Quality of daytime tours		1	1
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours	4		4
Quality of shopping			
Variety of shopping			
Price of things on Guam			5
Quality of hotel accommodations	2	2	2
Quality/cleanliness of air, sky	3		
Quality/cleanliness of parks			
Quality of landscape in Tumon			
Quality of landscape in Guam			3
Quality of ground handler	1		
Quality/cleanliness of transportation vehicles		3	
% of Per Person On Island Expenditures Accounted For	51.6%	55.7%	54.7%
NOTE: Only significant drivers are included.			

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by three significant factors in the Second Quarter 2015 Period. By rank order they are:
 - **Variety of daytime tours,**
 - **Quality of hotel accommodations, and**
 - **Quality/cleanliness of transportation vehicles.**
- With these three factors the overall r^2 is .557 meaning that **55.7% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On Isle Expenditure, 1st, 2nd Qtr and Overall 1-2 Qtr 2015			
	1st Qtr	2nd Qtr	Combin ed 1-2 Qtr
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks			
Ease of getting around			
Safety walking around at night	1		
Quality of daytime tours			
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping			
Variety of shopping		2	1
Price of things on Guam			
Quality of hotel accommodations			
Quality/cleanliness of air, sky			
Quality/cleanliness of parks			
Quality of landscape in Tumon		1	2
Quality of landscape in Guam			
Quality of ground handler			
Quality/cleanliness of transportation vehicles			
% of Per Person On Island Expenditures Accounted For	4.8%	10.3%	6.4%
NOTE: Only significant drivers are included.			

Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** of Taiwan visitors on Guam is driven by two significant factors in the Second Quarter 2015 Period. By rank order, they are:
 - **Quality of landscape in Tumon, and**
 - **Variety of shopping.**
- With these two factors the overall r^2 is .103 meaning that **10.3% of per person on island expenditure is accounted for by these factors.**