



# **GUAM VISITORS BUREAU**

## **Taiwan Visitor Tracker Exit Profile**

### **FY2016**

### **3<sup>RD</sup> QTR. (APR~JUN 2016)**



**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.

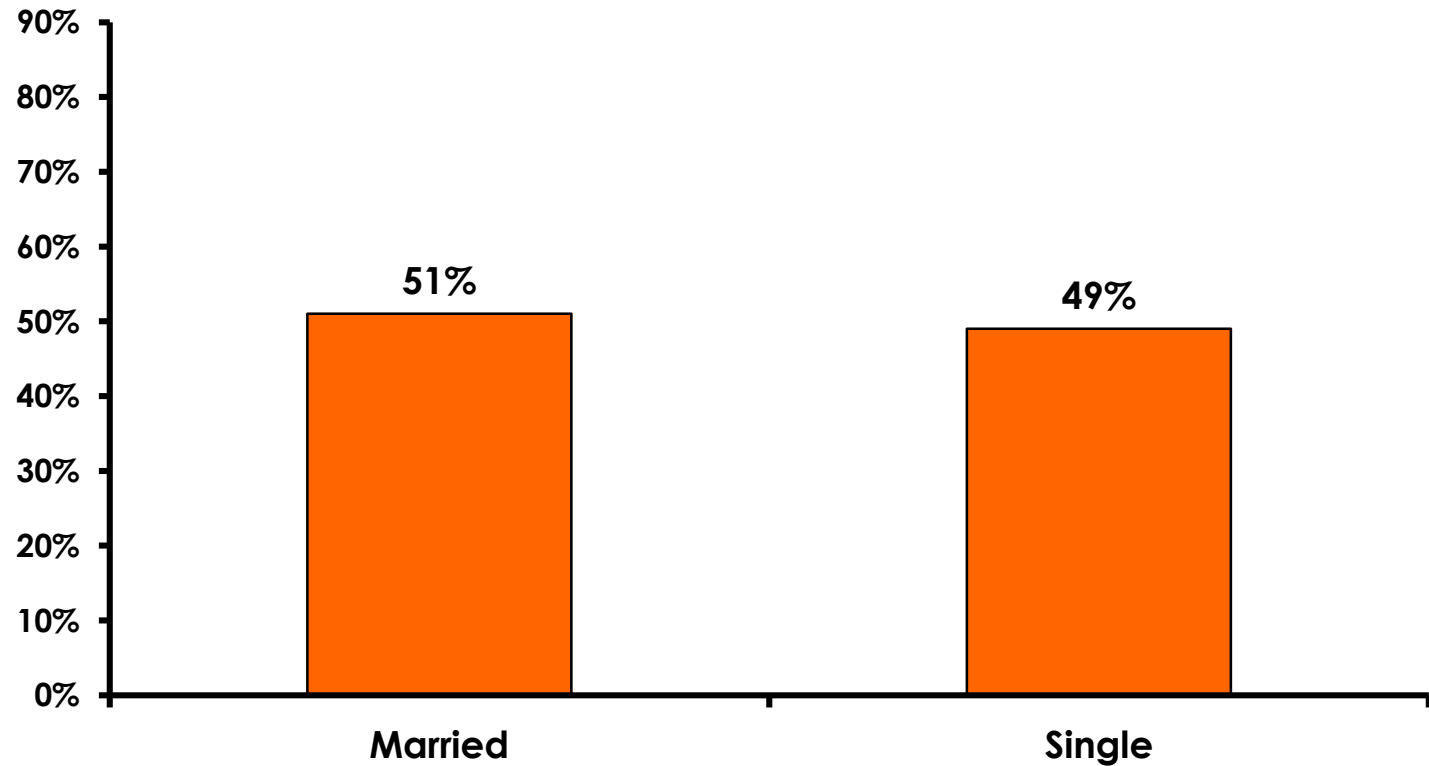
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# OBJECTIVES

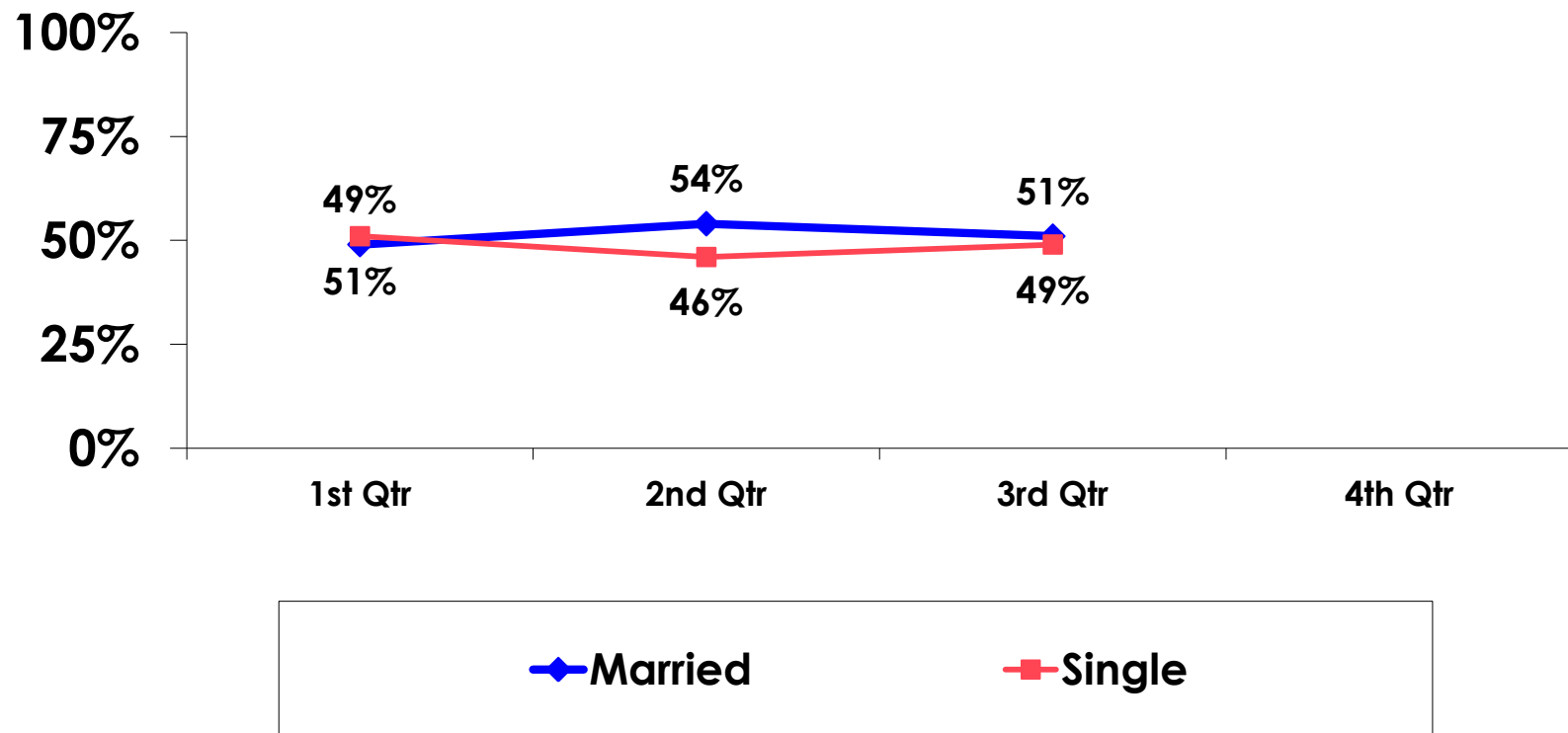
- To monitor the effectiveness of the Taiwan seasonal campaigns in attracting Taiwan visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Taiwan marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

# SECTION 1 **PROFILE OF RESPONDENTS**

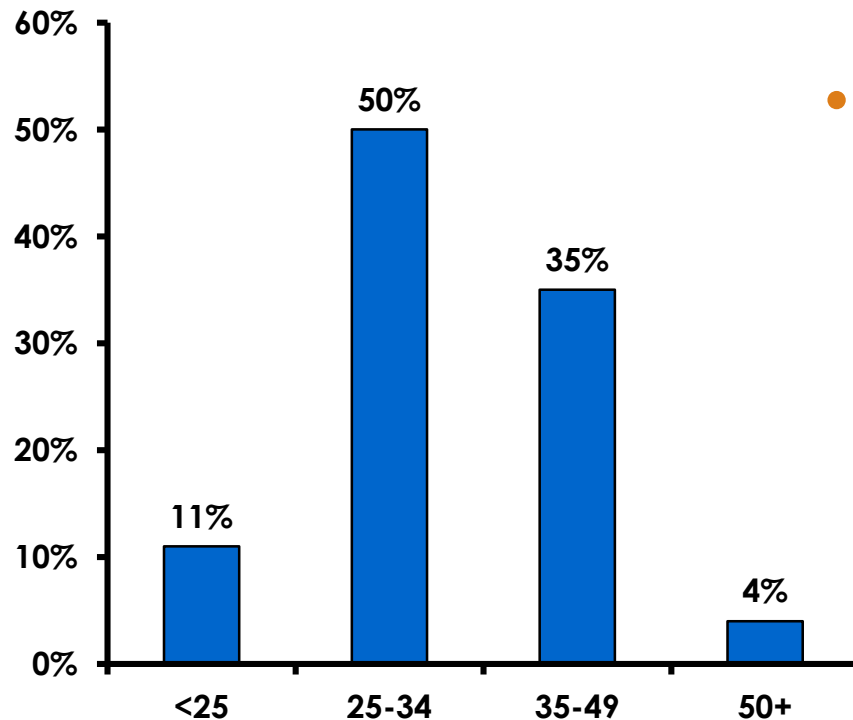
# Marital Status - Overall



# MARITAL STATUS

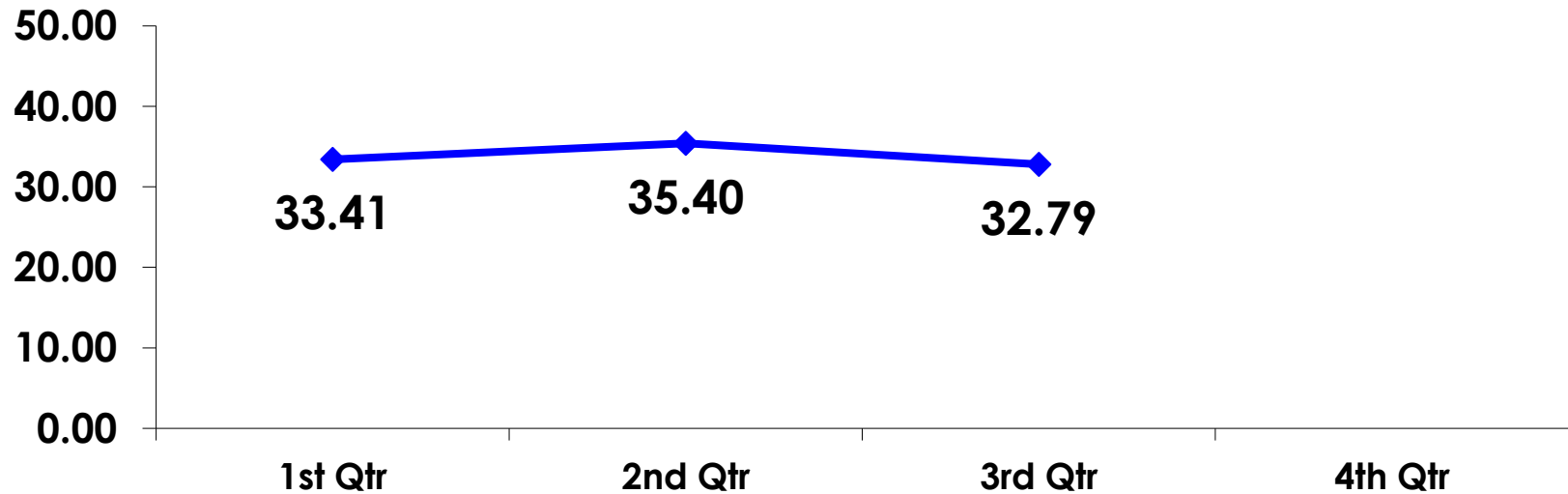


# Age - Overall



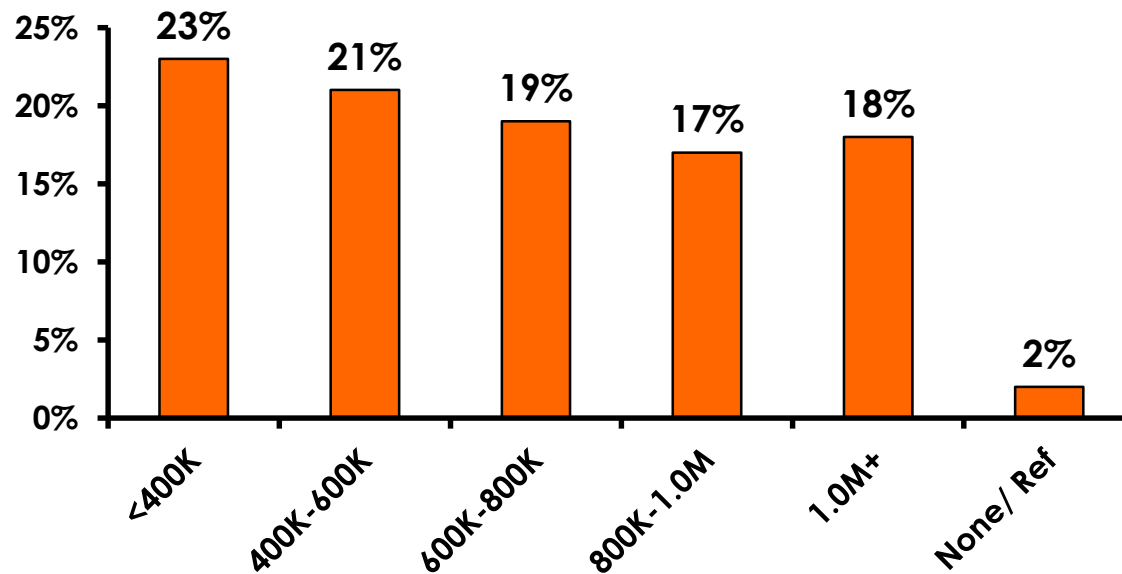
- The average age of the respondents is 32.79 years of age.

# AVERAGE - AGE



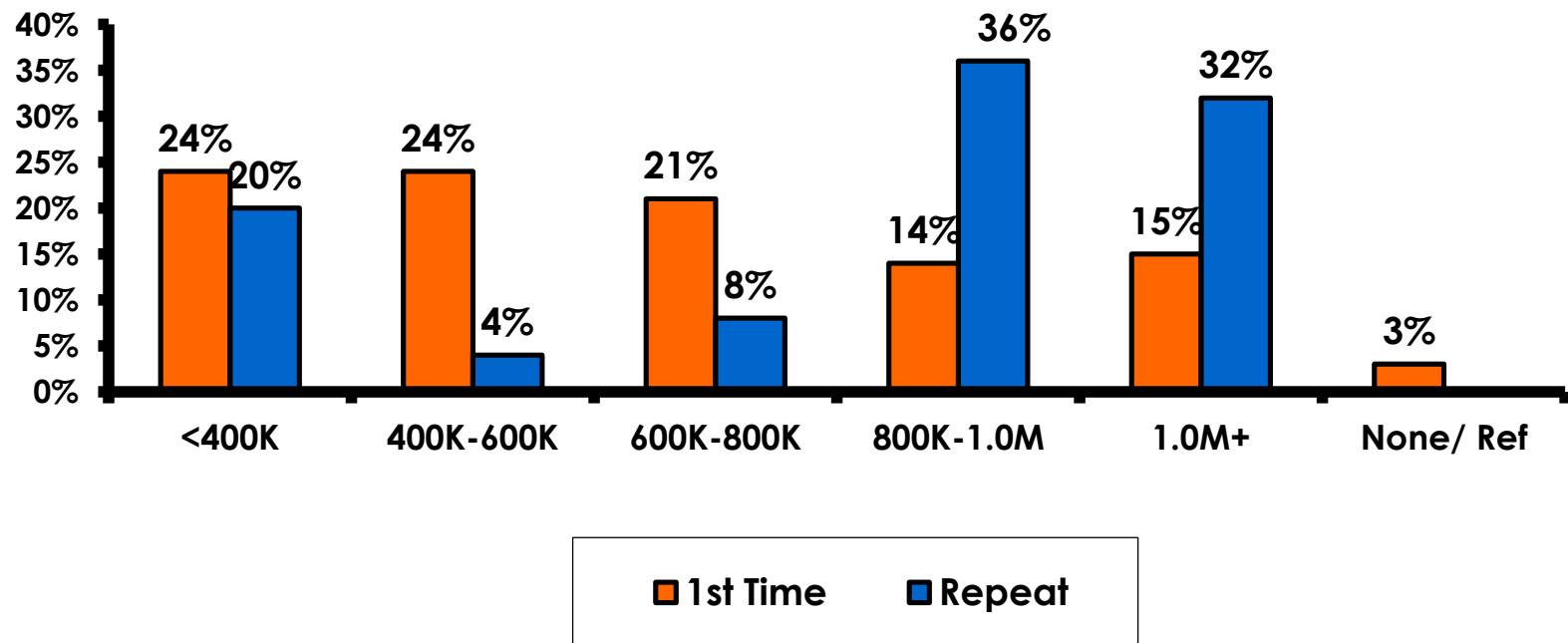


# Personal Income



- TWD  
32.43=\$1

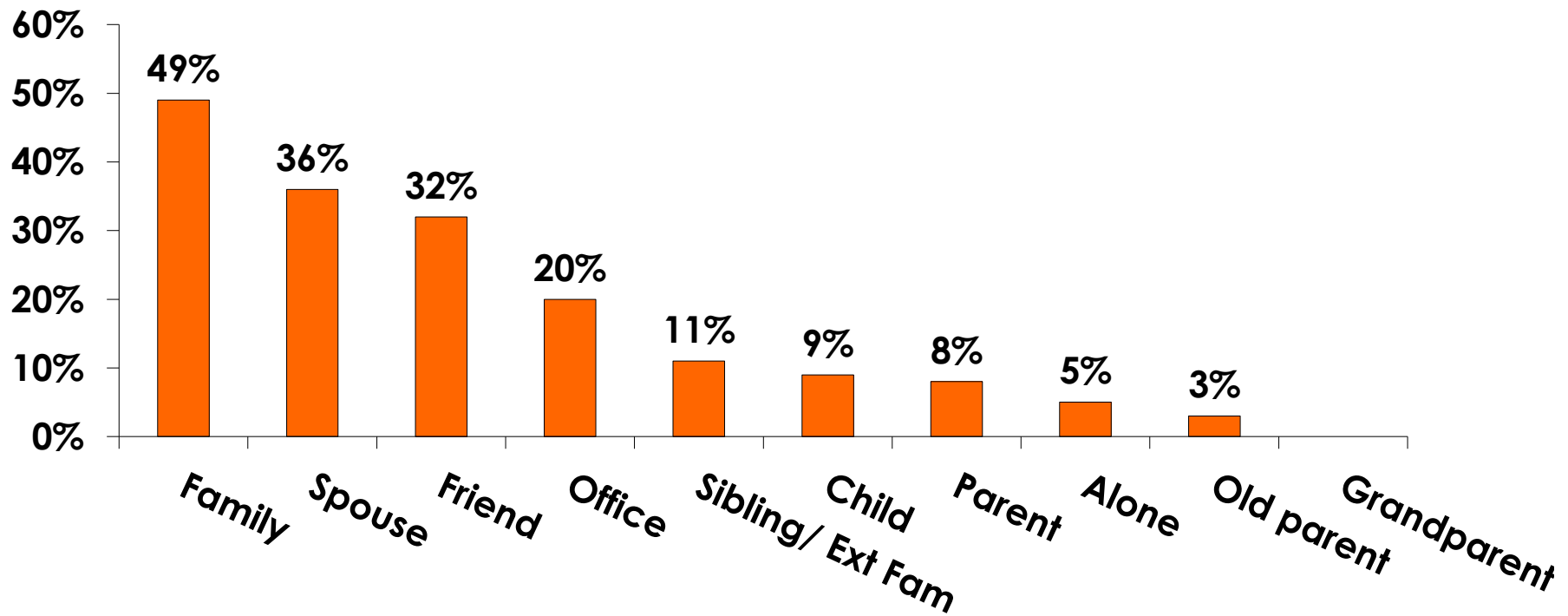
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<=NT160K	Count	13	4	9	6	6	1	
		Column N %	9%	6%	12%	38%	8%	2%	
	NT160K-NT200K	Count	10	7	3	2	4	3	1
		Column N %	7%	10%	4%	13%	5%	6%	20%
	NT200K-NT400K	Count	10	4	6	1	6	3	
		Column N %	7%	6%	8%	6%	8%	6%	
	NT400K-NT600K	Count	30	16	14	3	22	4	
		Column N %	21%	23%	19%	19%	30%	8%	
	NT600K-NT800K	Count	27	12	15	2	15	8	2
		Column N %	19%	17%	21%	13%	21%	16%	40%
	NT800K-NT1.0M	Count	25	10	15		11	13	1
		Column N %	17%	14%	21%		15%	27%	20%
	NT1.0M+	Count	26	17	9		8	17	1
		Column N %	18%	24%	12%		11%	35%	20%
	No Income	Count	3	1	2	2	1		
		Column N %	2%	1%	3%	13%	1%		
	Total	Count	144	71	73	16	73	49	5

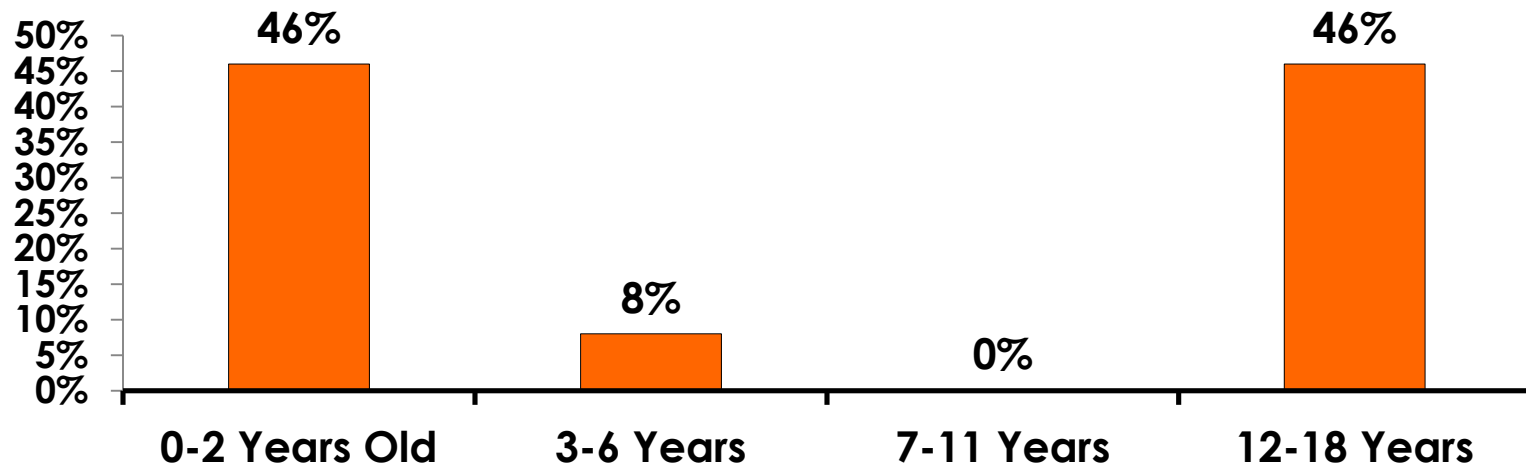
# Travel Companions



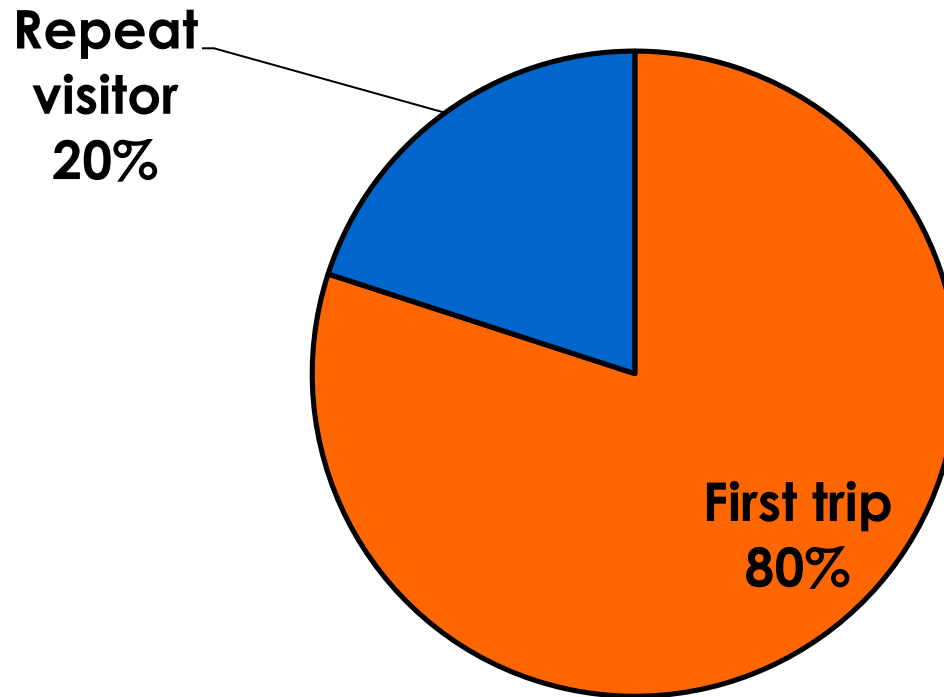
# Number of Children Travel Party

n=13 total respondents traveling with children.

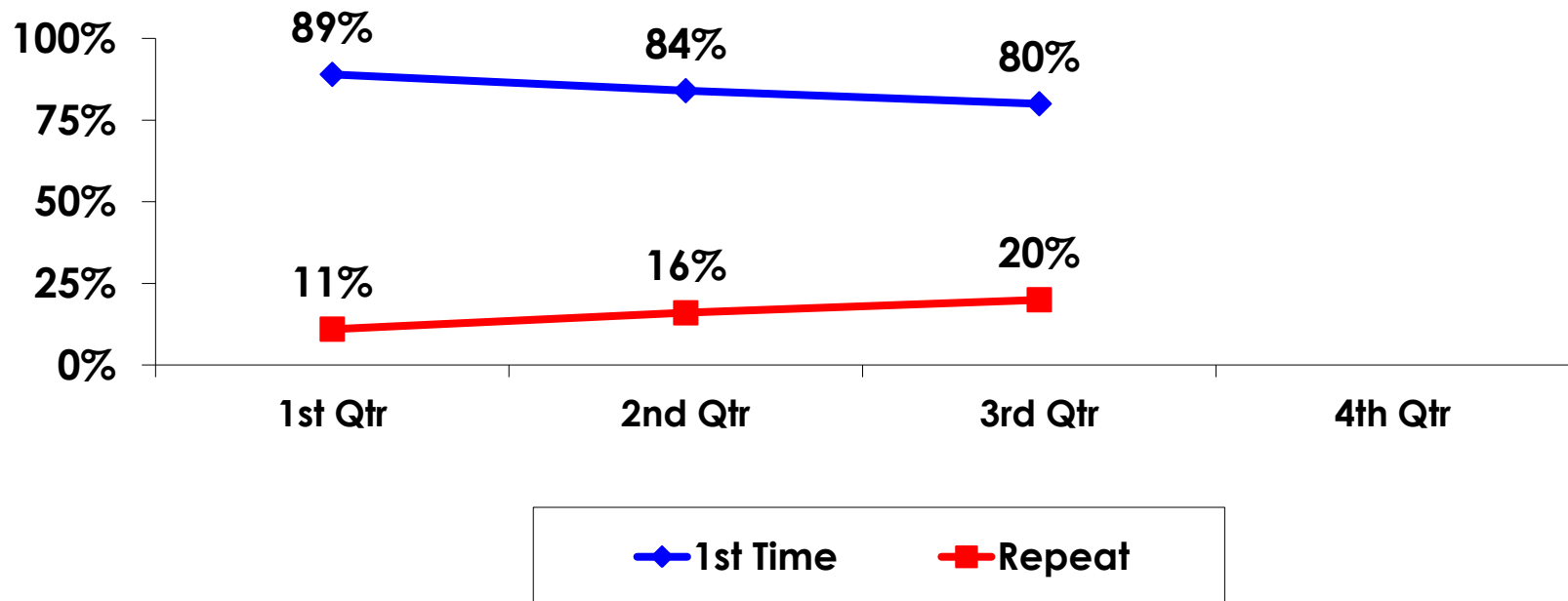
(Of those n=13 respondents, there is a total of 15 children 18 years or younger)



# Prior Trips to Guam



# PRIOR TRIPS TO GUAM



# Trips to Guam by Age & Gender

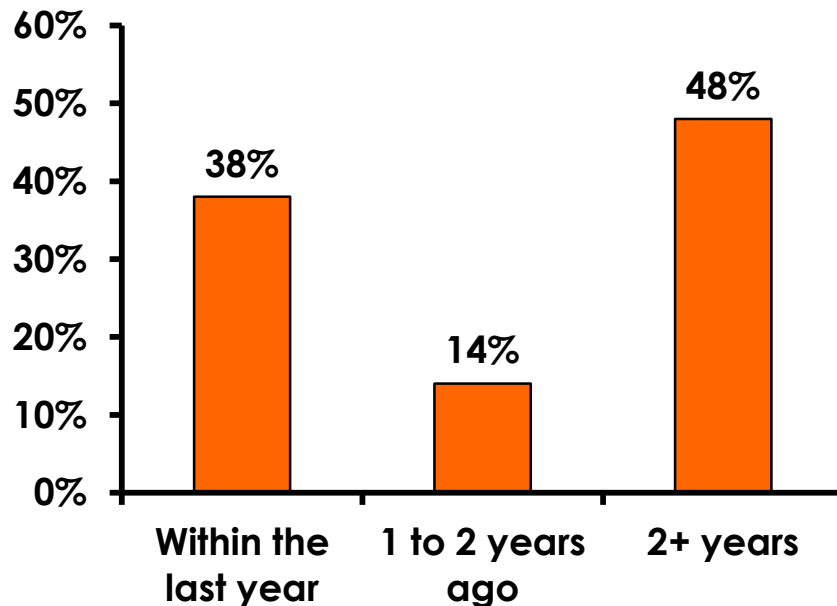
			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	77	55	21
		Column N %	51%	46%	72%
	Female	Count	73	64	8
		Column N %	49%	54%	28%
	Total	Count	150	119	29
AGE	18-24	Count	16	15	1
		Column N %	11%	13%	3%
	25-34	Count	75	64	10
		Column N %	50%	54%	34%
	35-49	Count	52	36	16
		Column N %	35%	30%	55%
	50+	Count	6	4	2
		Column N %	4%	3%	7%
	Total	Count	149	119	29

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



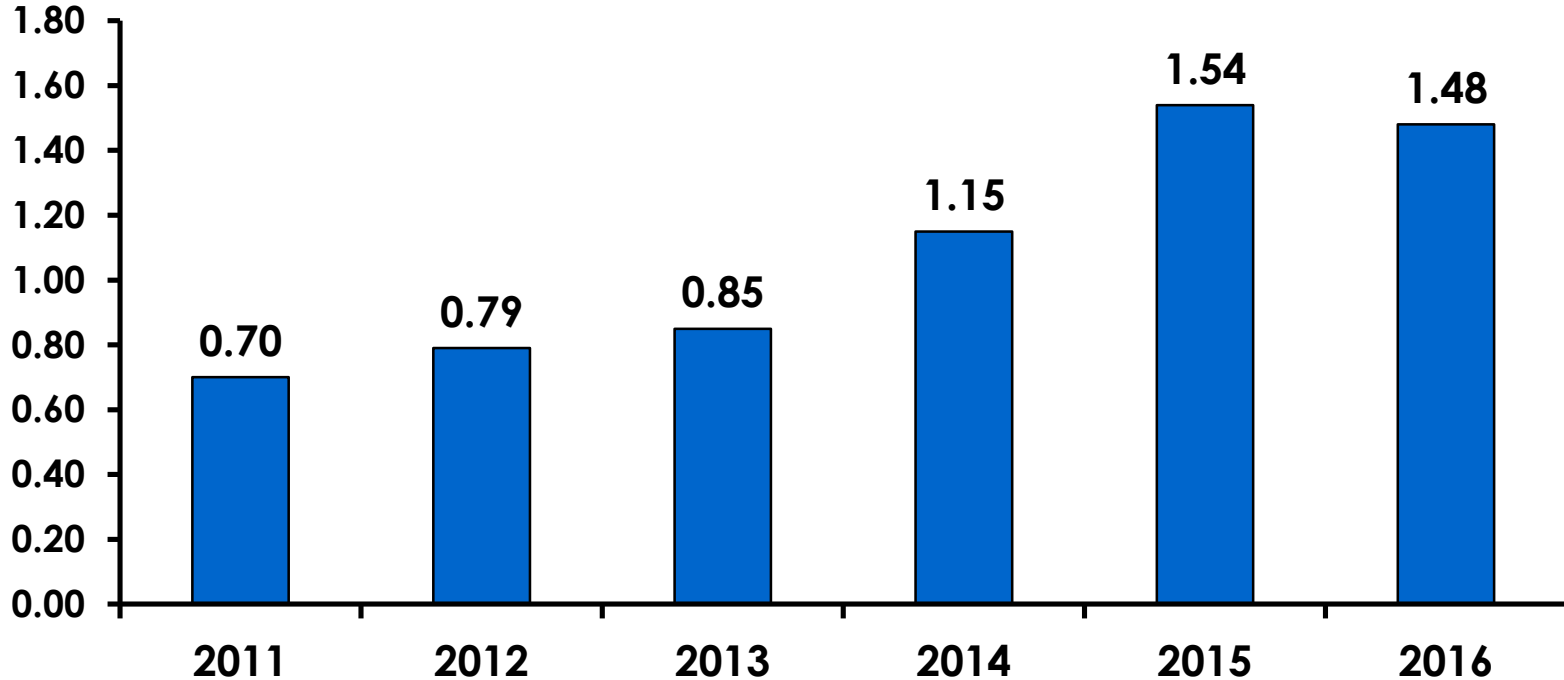
# Repeat Visitors Last Trip

n = 29



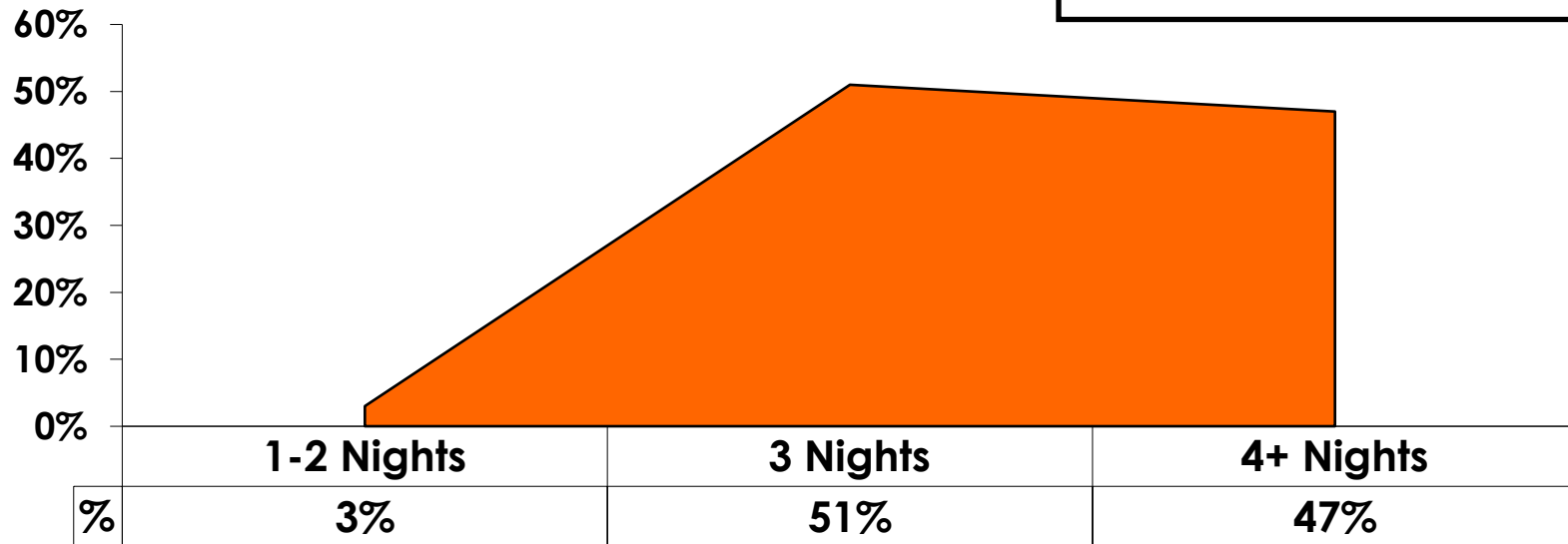
- The average repeat visitor has been to Guam 2.41 times.

# Average Number Overnight Trips (2011-2016) (2 nights or more)

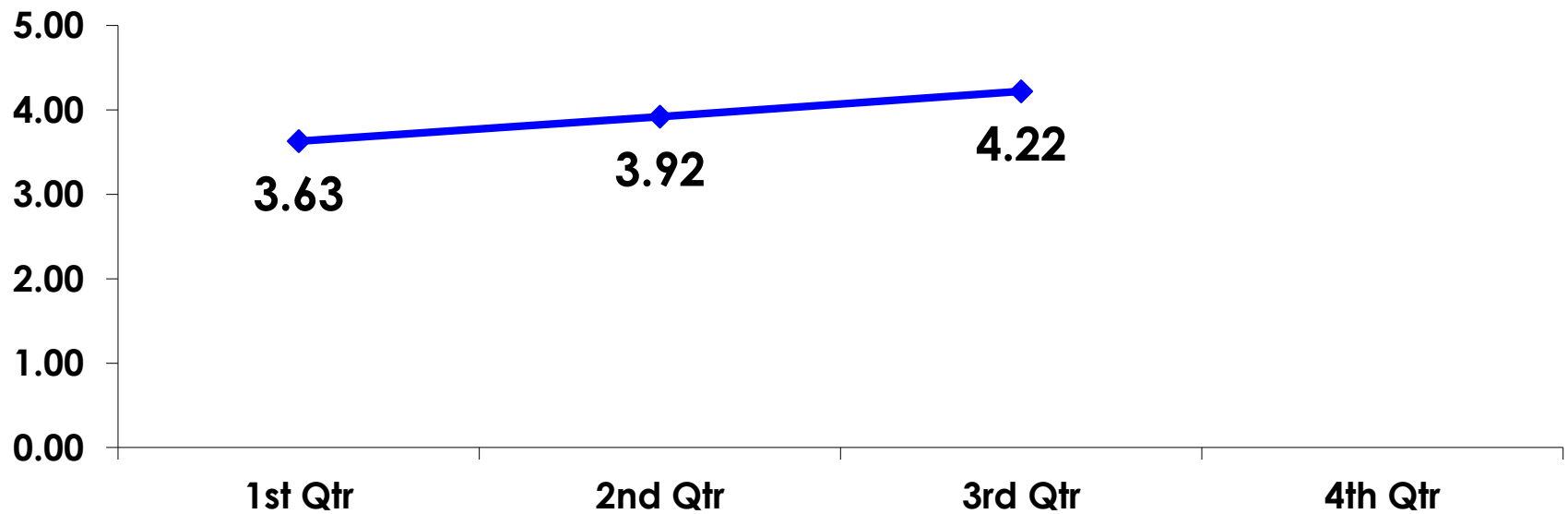


# Length of Stay

Mean = 4.22 Days  
Median = 3.0 Days



# AVG LENGTH OF STAY

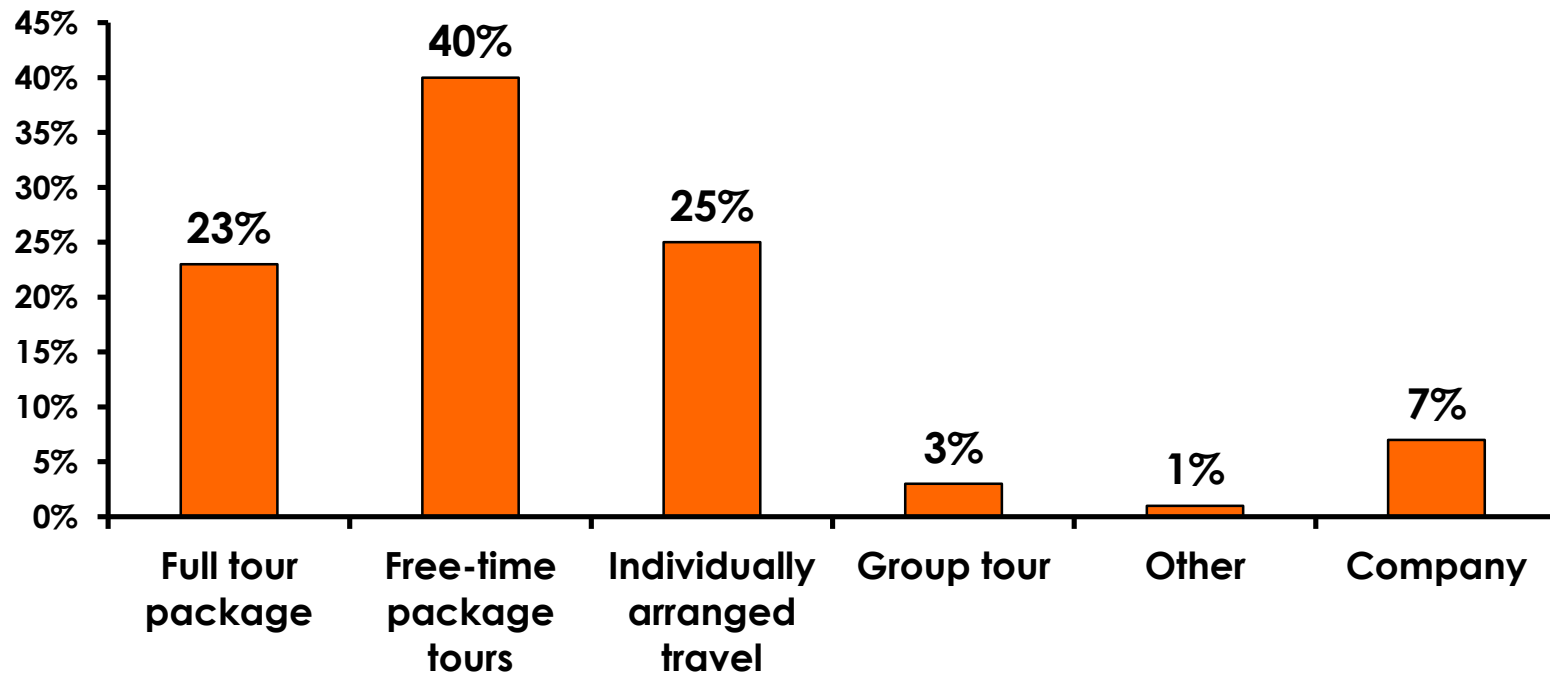


# Occupation by Income

		TOTAL	Q26								
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income	
Q25	Company: Office non-mgr	35%	15%	60%	30%	27%	41%	38%	38%		
	Prof-specialist	23%	23%	10%	20%	20%	19%	25%	38%	33%	
	Company: Salesperson	9%				20%	15%	13%	4%		
	Student	8%	38%	30%		7%	4%			33%	
	Skilled worker	6%			20%	10%	4%		12%		
	Freelancer	5%	8%		20%	7%		8%	4%		
	Retired	5%	8%			3%	4%	4%			
	Govt- Mgr/ Exec	5%			10%	3%	7%	13%			
	Other	4%	8%			3%	7%		4%	33%	
	Total	Count	149	13	10	10	30	27	24	26	3

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



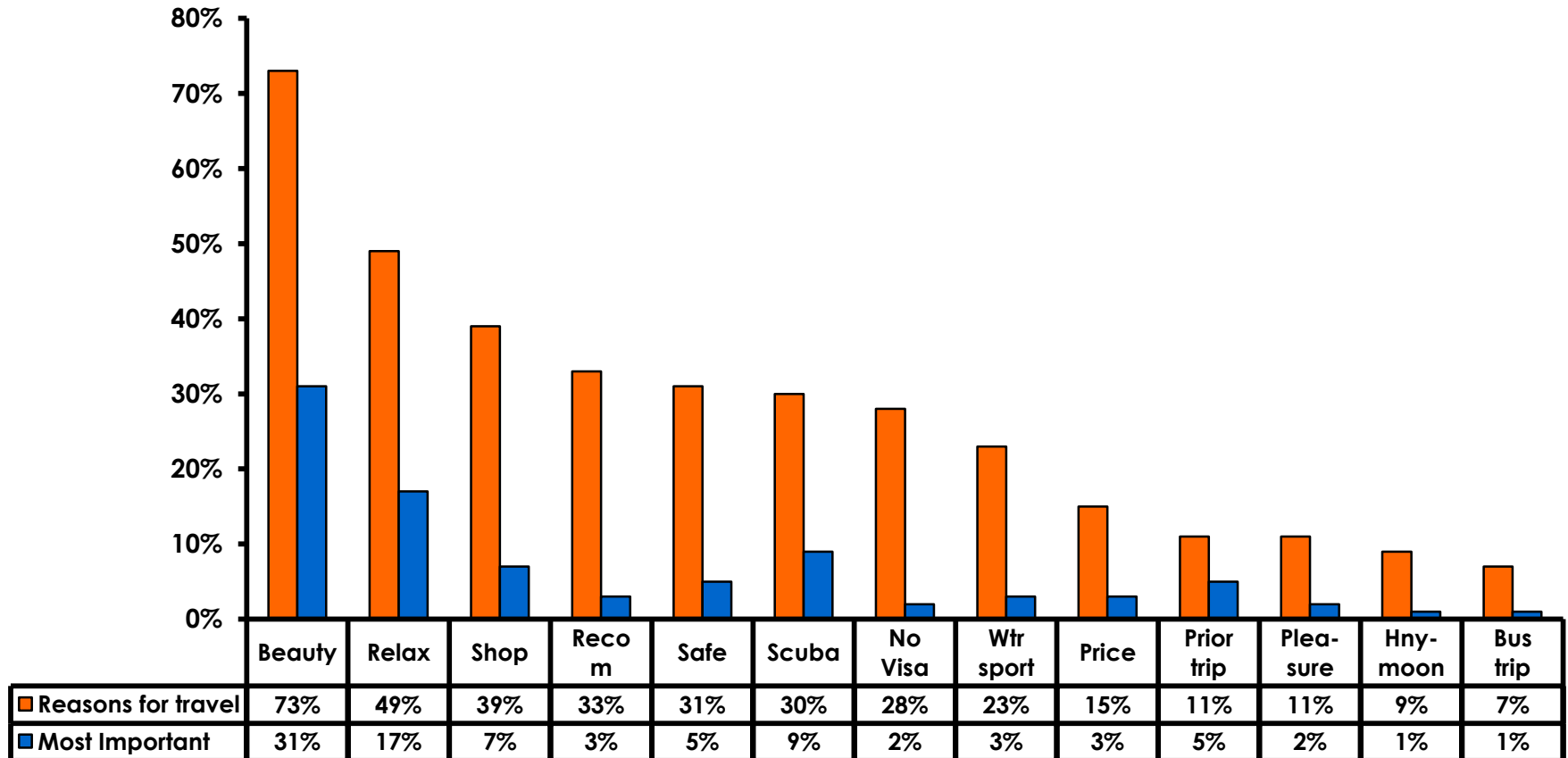
# Accommodation by Income

Average length of stay: 4.22 days

	TOTAL	Q26								
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income
Q9										
Fiesta Resort Guam	30%	31%	30%	40%	37%	19%	32%	35%	33%	
Hilton Guam Resort	10%	15%		10%	10%	11%	4%	15%		
Royal Orchid Guam	9%	8%		30%	7%	15%		12%	33%	
PIC Club	9%	15%	20%	10%	3%	15%	8%	4%		
Lotte Hotel Guam	6%	8%	10%		10%	4%	8%	4%		
Verona Resort & Spa	5%	15%		10%	3%	7%	4%	4%		
Guam Plaza Hotel	5%		10%		3%	7%	8%	8%		
Hyatt Regency Guam	4%					11%		8%	33%	
Home stay/ friend/ relative	3%		20%		3%		8%			
Other	3%						4%	8%		
Bayview Hotel	3%		10%		3%	4%				
Westin Resort Guam	3%						16%			
Apartment	2%	8%			3%		4%			
Holiday Resort Guam	2%				10%					
Onward Beach Resort	1%					4%				
Oceanview Hotel	1%									
Outrigger Guam Resort	1%				7%					
Dusit Thani Guam	1%							4%		
Tumon Bay Capital Hotel	1%					4%				
Grand Plaza Hotel	1%						4%			
Total	Count	150	13	10	10	30	27	25	26	3



# Travel Motivation - Top Responses



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# Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches
- Relaxation
- Scuba

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	73%	81%	72%	73%	67%	66%	81%	
	Relax	49%	50%	56%	42%	17%	51%	47%	
	Shopping	39%	44%	41%	37%		32%	45%	
	Recomm- friend/family/trvl agnt	33%	69%	24%	38%		34%	32%	
	Safe	31%	31%	25%	40%		34%	27%	
	Scuba	30%	44%	28%	31%		27%	33%	
	No Visa requirement	28%	38%	27%	29%		23%	33%	
	Water sports	23%	31%	19%	29%		23%	22%	
	Price	15%	13%	16%	17%		13%	18%	
	Other	12%		15%	13%		13%	11%	
	Previous trip	11%		8%	17%	17%	14%	8%	
	Pleasure	11%	13%	9%	13%		9%	12%	
	Honeymoon	9%	13%	12%	6%		9%	10%	
	Company/ Business Trip	7%	6%	7%	6%	17%	9%	4%	
	Short travel time	7%		8%	6%		3%	11%	
	Married/ Attn wedding	6%		3%	12%	17%	9%	3%	
	Visit friends/ Relatives	3%	6%		6%		4%	1%	
	Organized sports	2%		1%	4%		1%	3%	
	Convention/ Trade/ Conference	2%		4%			1%	3%	
	Career Cert/ Testing	1%		1%	2%		1%	1%	
	Golf	1%		1%	2%		1%	1%	
	Total	Count	150	16	75	52	6	77	73

# Motivation by Income

		TOTAL	Q26								
		-	<=NT160K	NT160K-NT200K	NT200K-NT400K	NT400K-NT600K	NT600K-NT800K	NT800K-NT1.0M	NT1.0M+	No Income	
Q5A	Natural beauty	73%	62%	80%	70%	73%	78%	68%	73%	100%	
	Relax	49%	46%	40%	10%	60%	52%	48%	46%	67%	
	Shopping	39%	46%	50%	50%	57%	19%	36%	35%	33%	
	Recomm- friend/family/trvl agnt	33%	38%	40%		40%	41%	32%	15%	67%	
	Safe	31%	31%	30%		47%	30%	28%	23%	33%	
	Scuba	30%	38%	20%	40%	43%	37%	16%	15%	33%	
	No Visa requirement	28%	23%	30%		37%	26%	32%	23%	67%	
	Water sports	23%	31%	20%	20%	27%	26%	16%	19%	33%	
	Price	15%	8%	10%		20%	11%	12%	27%	67%	
	Other	12%	8%	10%	10%	13%	22%	4%	15%		
	Previous trip	11%		10%		7%	4%	16%	31%		
	Pleasure	11%	23%	10%		7%	26%	4%	4%		
	Honeymoon	9%	15%	20%		13%	4%	12%	8%		
	Company/ Business Trip	7%			20%		11%	8%	8%		
	Short travel time	7%		10%		23%		4%			
	Married/ Attn wedding	6%			10%	3%	7%	4%	12%		
	Visit friends/ Relatives	3%		10%		3%		4%			
	Organized sports	2%					11%				
	Convention/ Trade/ Conference	2%		10%		3%		4%			
	Career Cert/ Testing	1%						8%			
	Golf	1%				3%					
	Total	Count	150	13	10	10	30	27	25	26	3

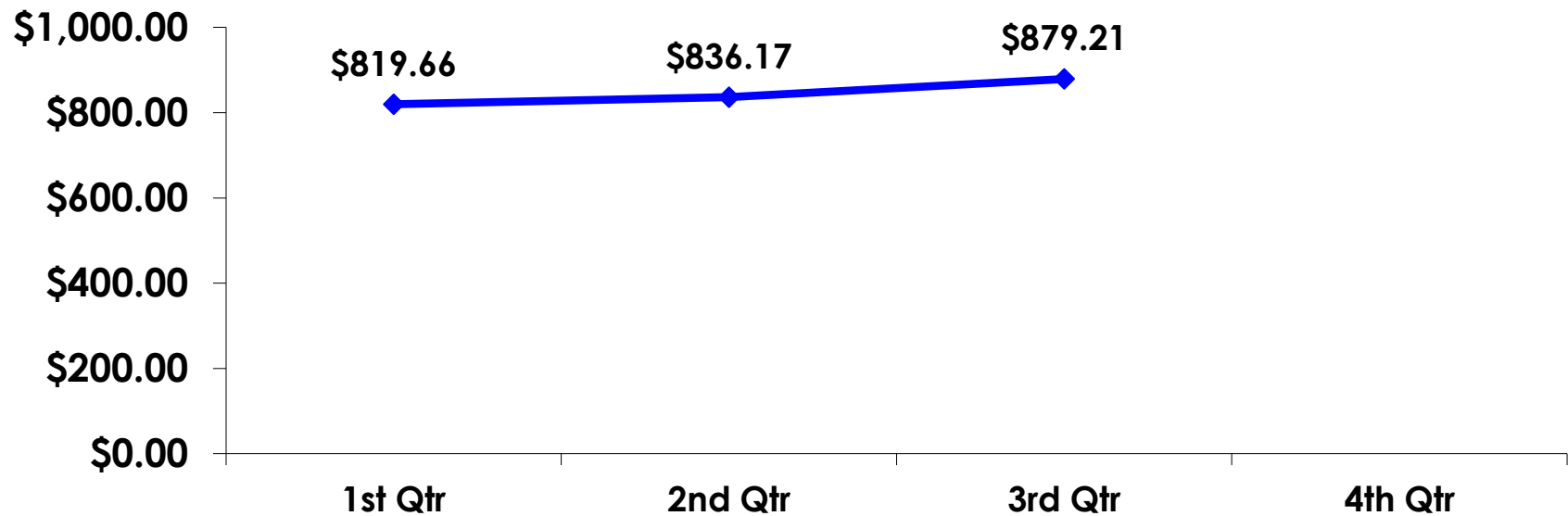
# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures

TWD 32.43/US\$1

- \$1,235.92 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$6,167 = maximum (highest amount recorded for the entire sample)
- \$879.21 = overall mean average per person prepaid expenditures

# PREPAID EXPENDITURES Per Person



YTD=\$845.02

# Breakdown of Prepaid Expenditures

## TWD 33.24=\$1

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

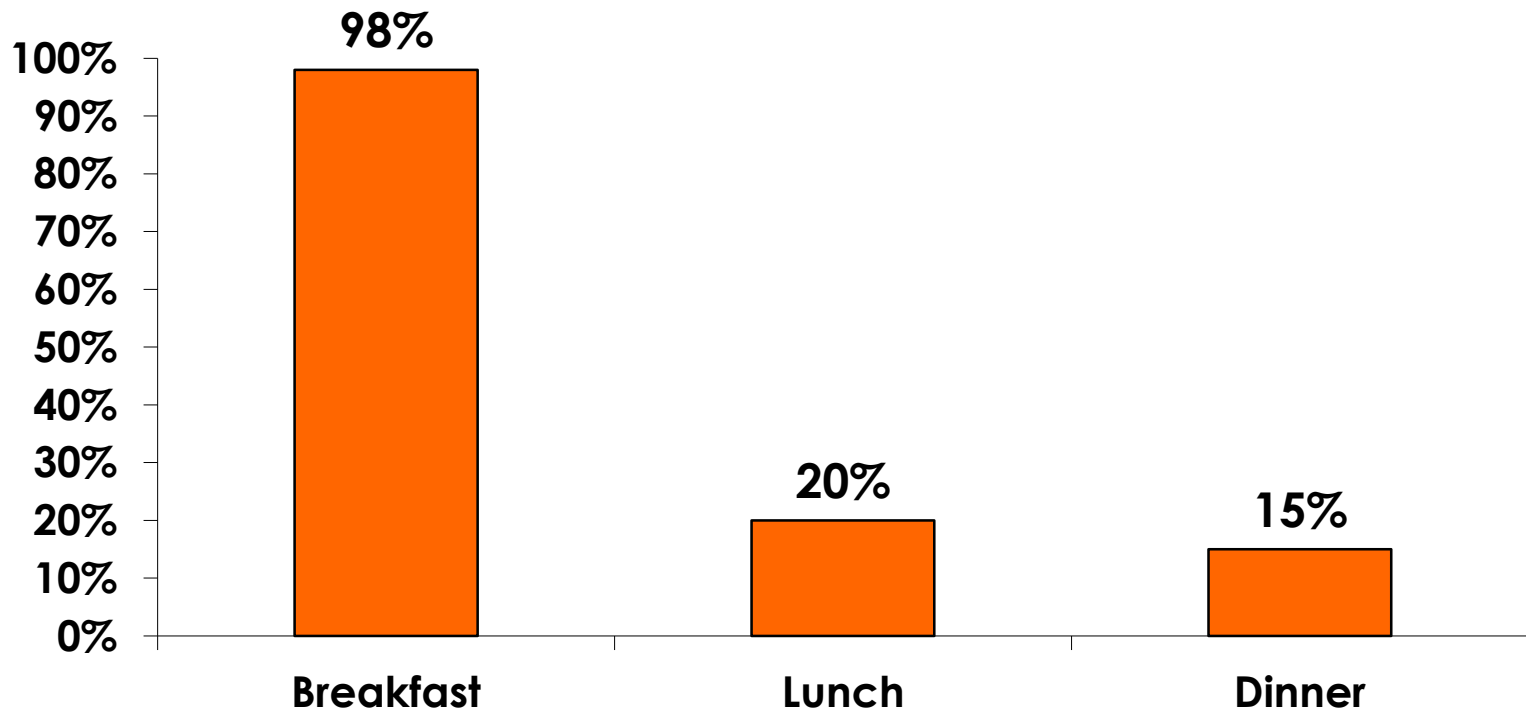
	MEAN \$
Air & Accommodation package only	\$1,115.86
Air & Accommodation w/ daily meal package	\$1,559.38
Air only	\$958.99
Accommodation only	\$555.04
Accommodation w/ daily meal only	\$311.75
Food & Beverages in Hotel	\$308.36
Ground transportation – Taiwan	\$50.57
Ground transportation – Guam	\$115.55
Optional tours/ activities	\$447.30
Other expenses	\$546.71
<b>Total Prepaid</b>	<b>\$1,235.92</b>



# PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n= 61

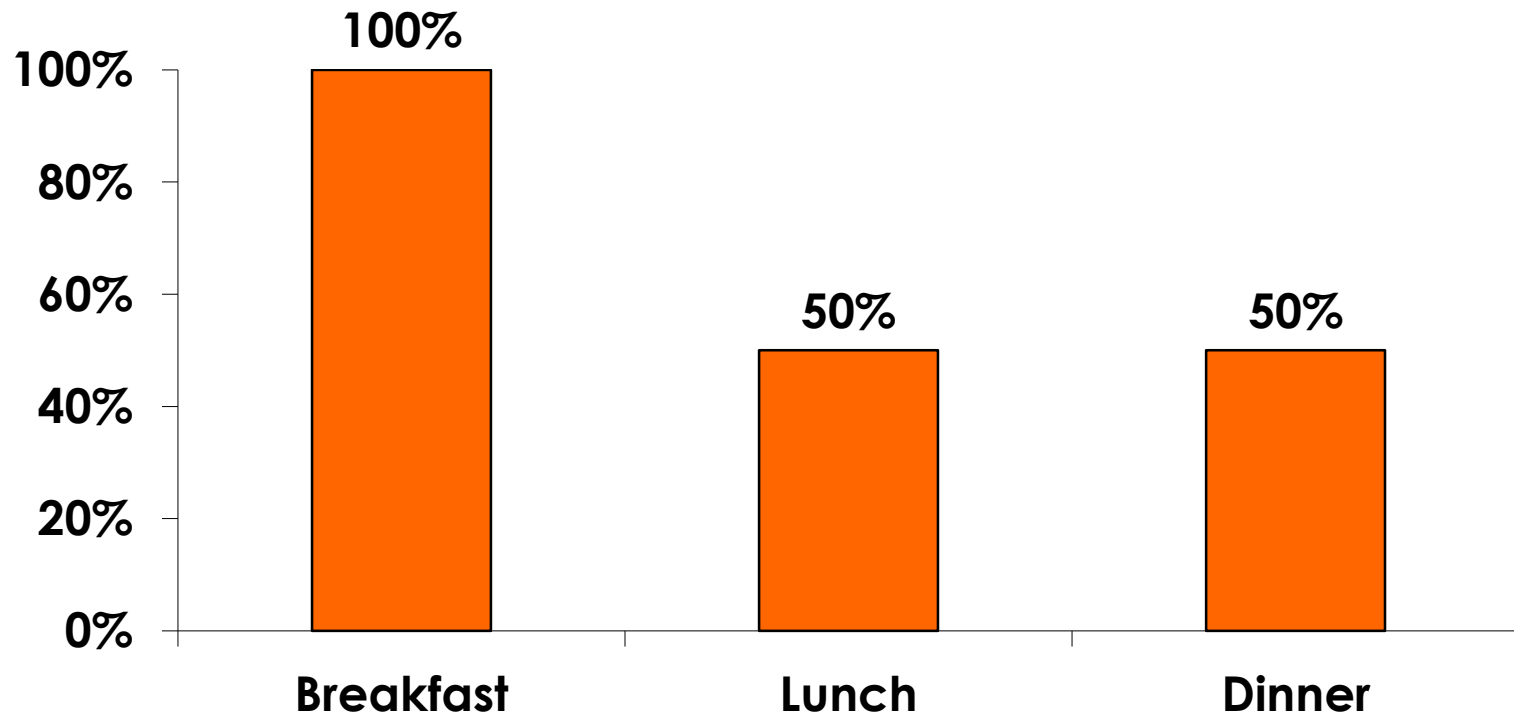


Mean=\$1,559.38 per travel party

# PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

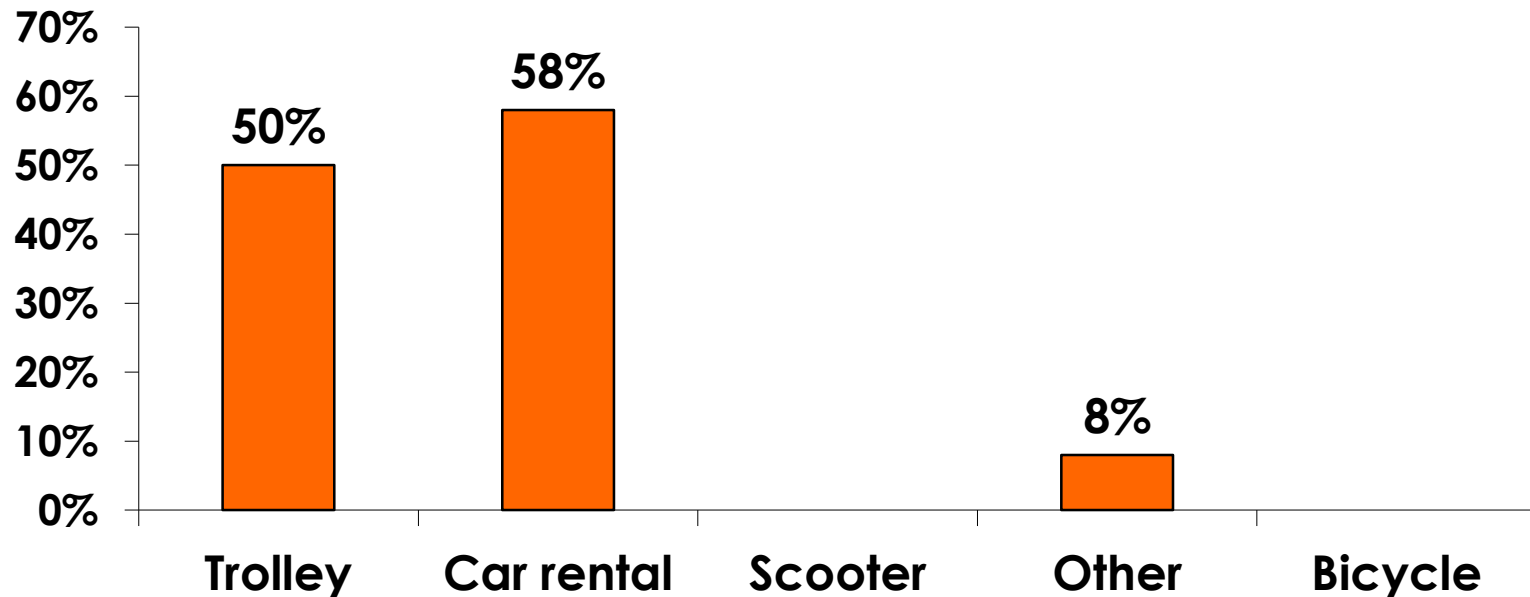
n=2



Mean=\$311.75 per travel party

# PREPAID GROUND TRANSPORTATION

n=12



Mean=\$115.55 per travel party

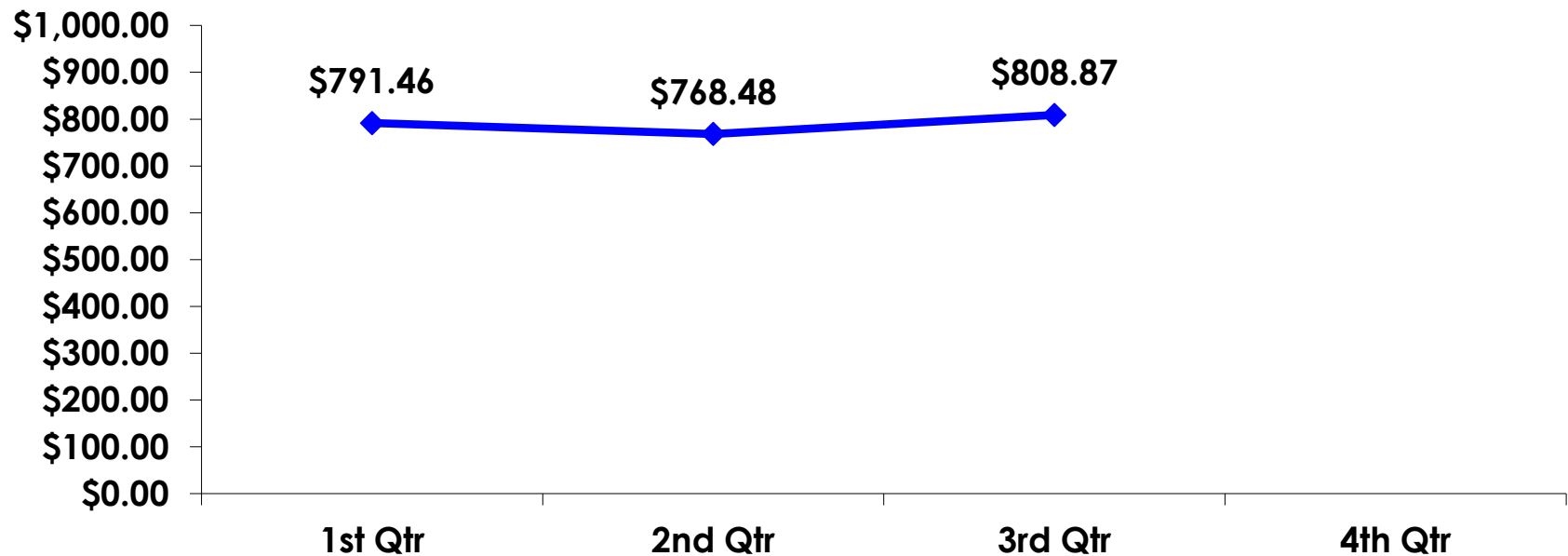
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# On-Island Expenditures

- \$1,100.52 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,000 = Maximum (highest amount recorded for the entire sample)
- \$808.87 = overall mean average per person on-island expenditure

# ON-ISLAND EXPENDITURES

## Per Person

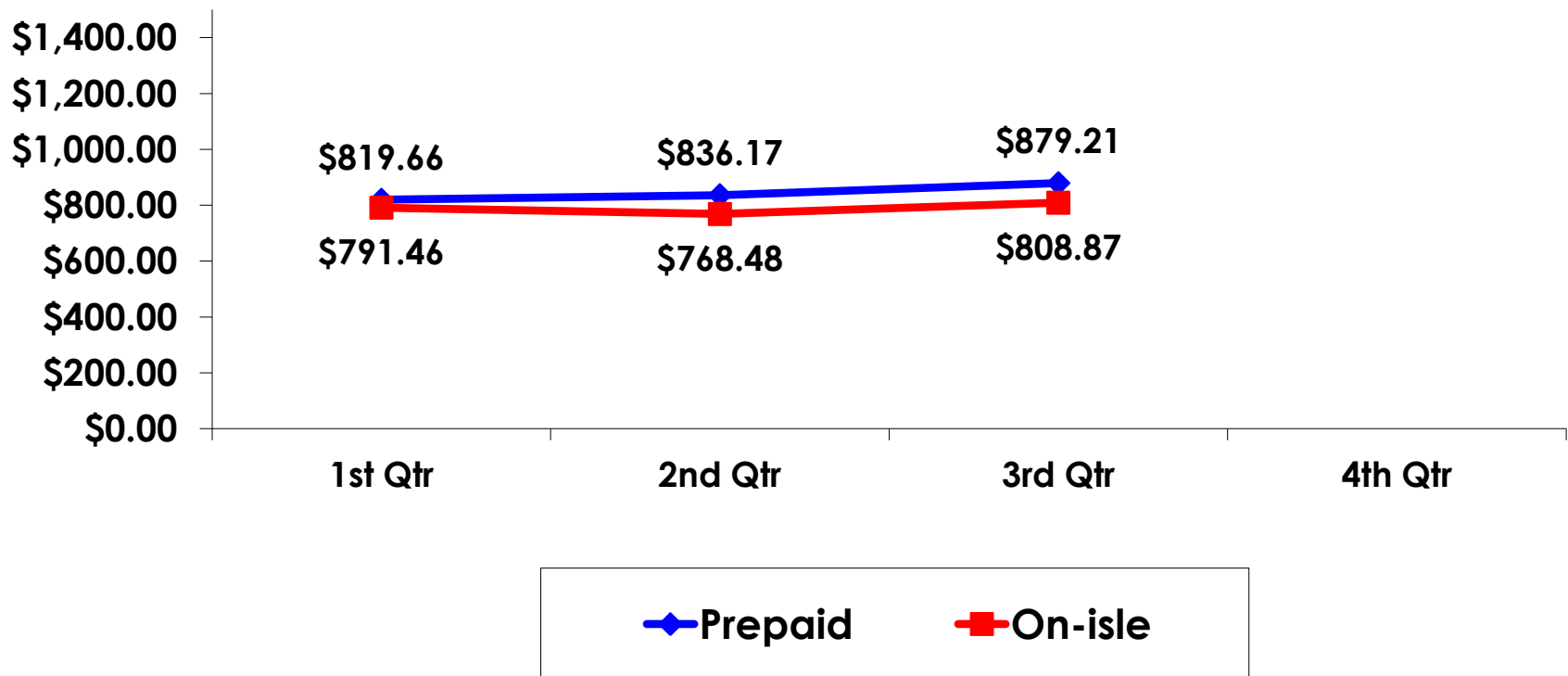


YTD = \$789.60

# PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$845.02

On-Isle YTD = \$789.60



# 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	\$808.87	\$717.67	\$905.05	\$213.83	\$717.86	\$826.10	\$689.00	\$243.67	\$787.68	\$1,487.47	\$1,500.00
	Median	\$432	\$400	\$478	\$200	\$482	\$400	\$120	\$233	\$530	\$500	\$1,500
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,500
	Maximum	\$10,000	\$10,000	\$6,409	\$463	\$5,000	\$10,000	\$3,000	\$770	\$3,000	\$6,409	\$1,500

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$49.91	\$44.09	\$56.04	\$34.12	\$42.35	\$72.38	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$107.87	\$56.47	\$162.08	\$43.13	\$84.92	\$175.21	\$1.67
	Median	\$0	\$0	\$0	\$3	\$20	\$0	\$0
F&B RESTRNT	Mean	\$97.45	\$69.66	\$126.75	\$20.62	\$74.28	\$167.62	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$118.73	\$146.66	\$89.26	\$86.56	\$150.23	\$99.17	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$259.58	\$216.39	\$305.14	\$56.88	\$325.35	\$261.75	\$2.50
	Median	\$43	\$0	\$100	\$8	\$60	\$6	\$0
GIFT- OTHER	Mean	\$129.13	\$142.44	\$115.10	\$25.94	\$111.76	\$203.33	\$0.00
	Median	\$0	\$0	\$0	\$0	\$48	\$0	\$0
TRANS	Mean	\$48.21	\$57.45	\$38.47	\$22.00	\$48.69	\$62.08	\$0.00
	Median	\$0	\$0	\$0	\$0	\$6	\$0	\$0
OTHER	Mean	\$296.29	\$295.53	\$297.10	\$78.69	\$135.08	\$535.27	\$820.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$210
TOTAL	Mean	\$1,100.52	\$1,015.71	\$1,189.97	\$368.00	\$972.68	\$1,557.58	\$824.17
	Median	\$600	\$500	\$630	\$258	\$613	\$862	\$210



# On-Island Expenditures

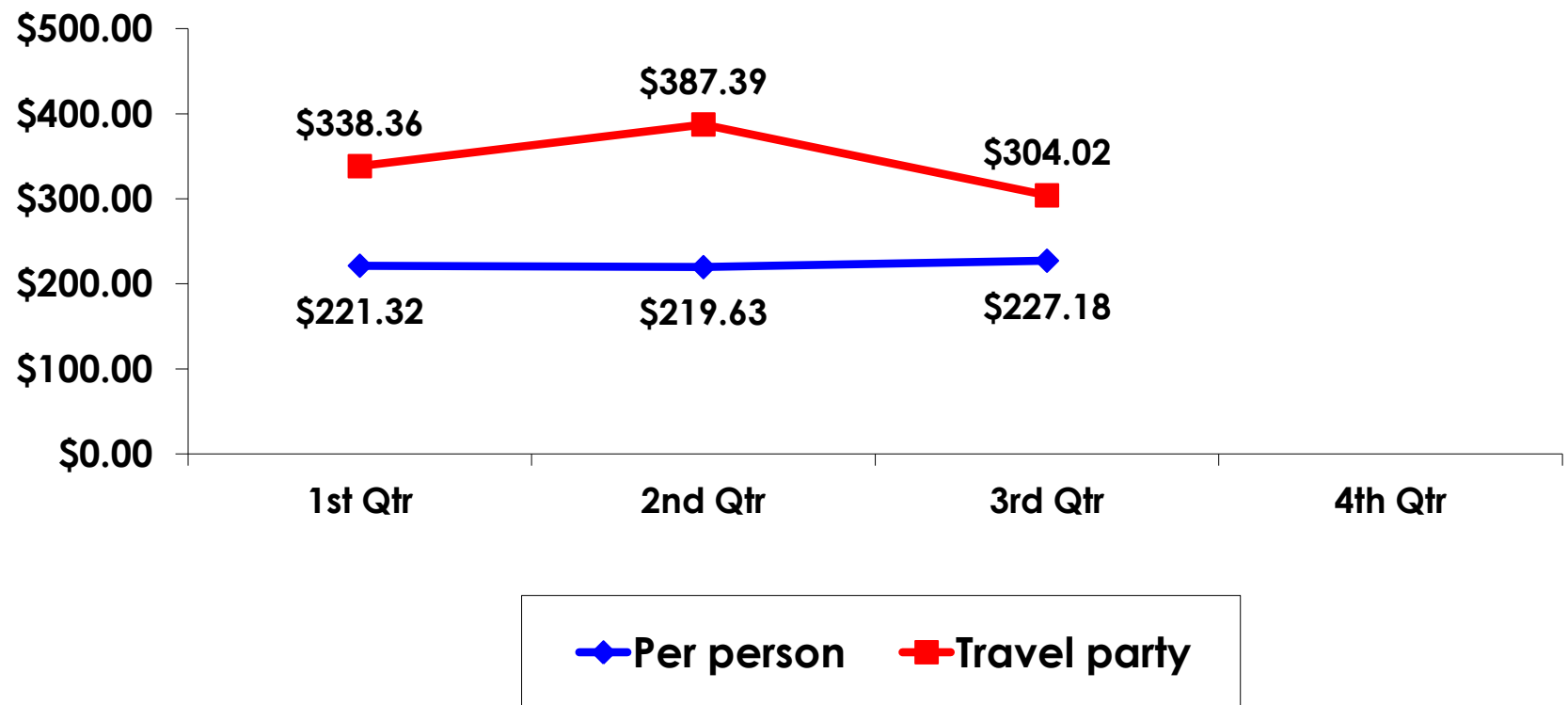
## First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$49.91	\$51.13	\$48.31
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$107.87	\$105.12	\$126.59
	Median	\$0	\$5	\$0
F&B RESTRNT	Mean	\$97.45	\$73.02	\$204.41
	Median	\$0	\$0	\$35
OPT TOUR	Mean	\$118.73	\$117.66	\$131.28
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$259.58	\$209.35	\$483.59
	Median	\$43	\$31	\$100
GIFT- OTHER	Mean	\$129.13	\$135.94	\$110.10
	Median	\$0	\$0	\$0
TRANS	Mean	\$48.21	\$44.50	\$66.79
	Median	\$0	\$0	\$0
OTHER	Mean	\$296.29	\$302.83	\$279.55
	Median	\$0	\$0	\$0
TOTAL	Mean	\$1,100.52	\$1,031.16	\$1,450.69
	Median	\$600	\$520	\$1,000

# ON-ISLE EXPENDITURES – Per Day

Per Person YTD = \$222.70

Travel Party YTD = \$343.47

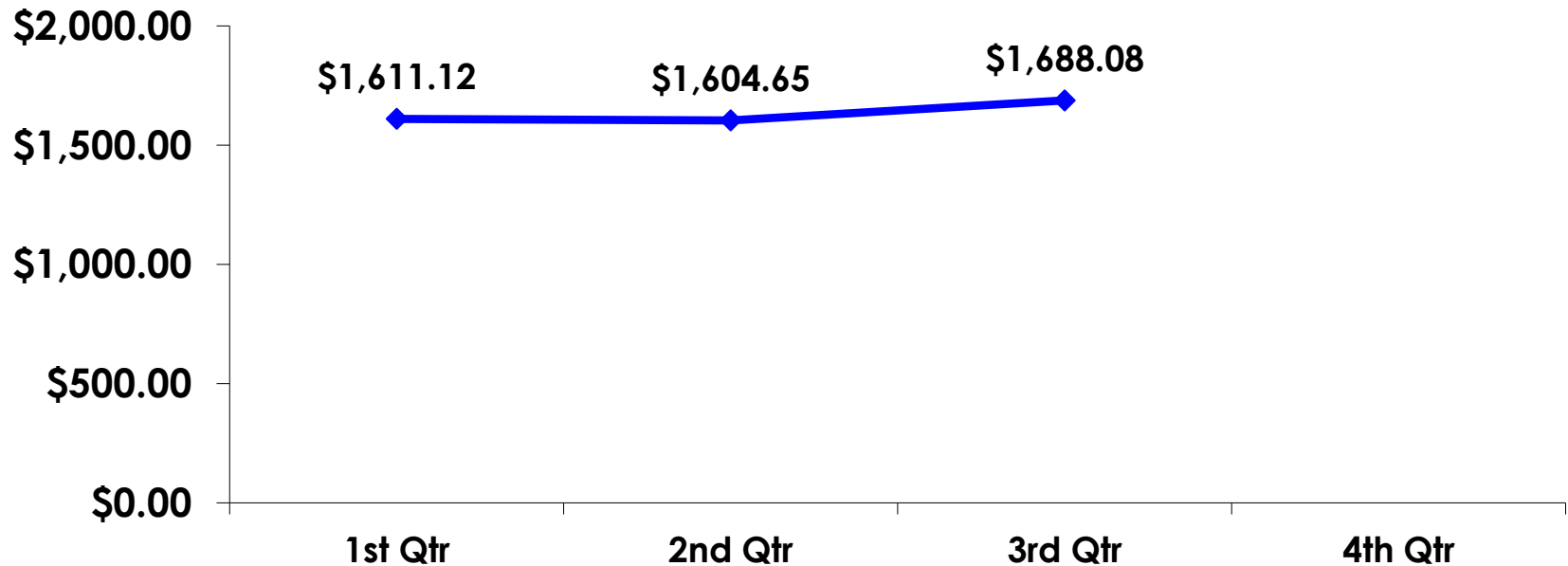


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# Total Expenditures Per Person (Prepaid & On-Island)

- \$1,688.08 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$11,388 = Maximum (highest amount recorded for the entire sample)

# TOTAL EXPENDITURES Per Person



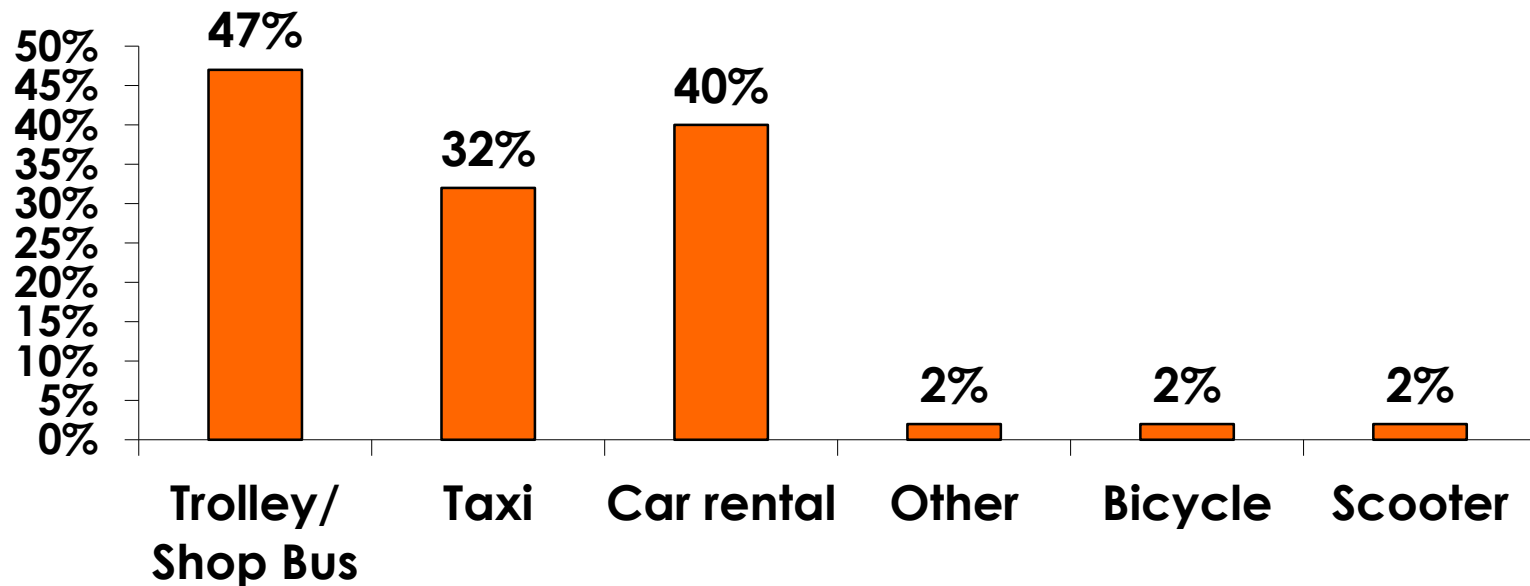
YTD=\$1,634.62

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$49.91
Food & beverage in fast food restaurant/convenience store	\$107.87
Food & beverage at restaurants or drinking establishments outside a hotel	\$97.45
Optional tours and activities	\$118.73
Gifts/ souvenirs for yourself/companions	\$259.58
Gifts/ souvenirs for friends/family at home	\$129.13
Local transportation	\$48.21
Other expenses not covered	\$296.29
<b>Average Total</b>	<b>\$1,100.52</b>

# Local Transportation

n=60



Mean=\$48.21 per travel party

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# Guam Airport Expenditures

- \$135.51 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,000 = Maximum (highest amount recorded for the entire sample)

# Breakdown of Airport Expenditures

	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	\$25.01
<b>Gifts/Souvenirs Self</b>	\$66.67
<b>Gifts/Souvenirs Others</b>	\$43.17
<b>Total</b>	<b>\$135.51</b>

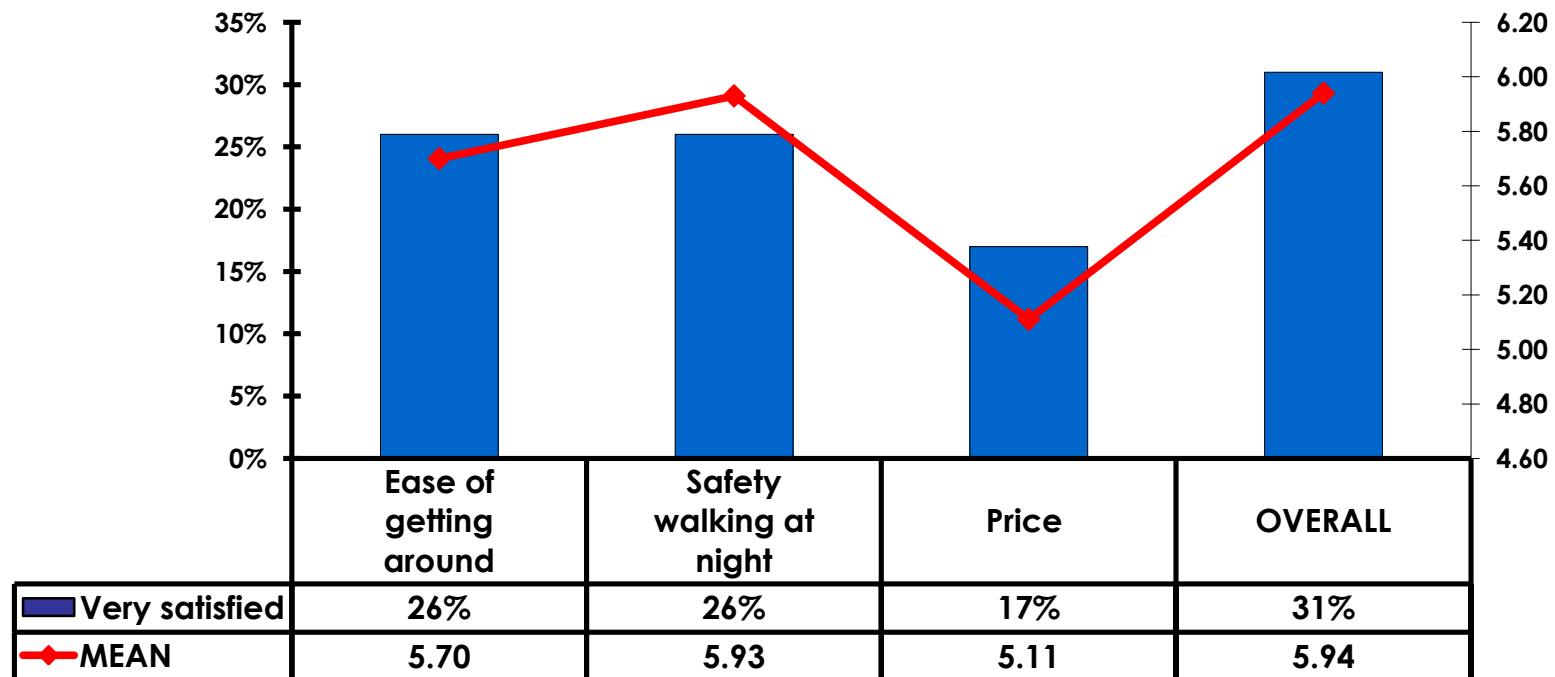


# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

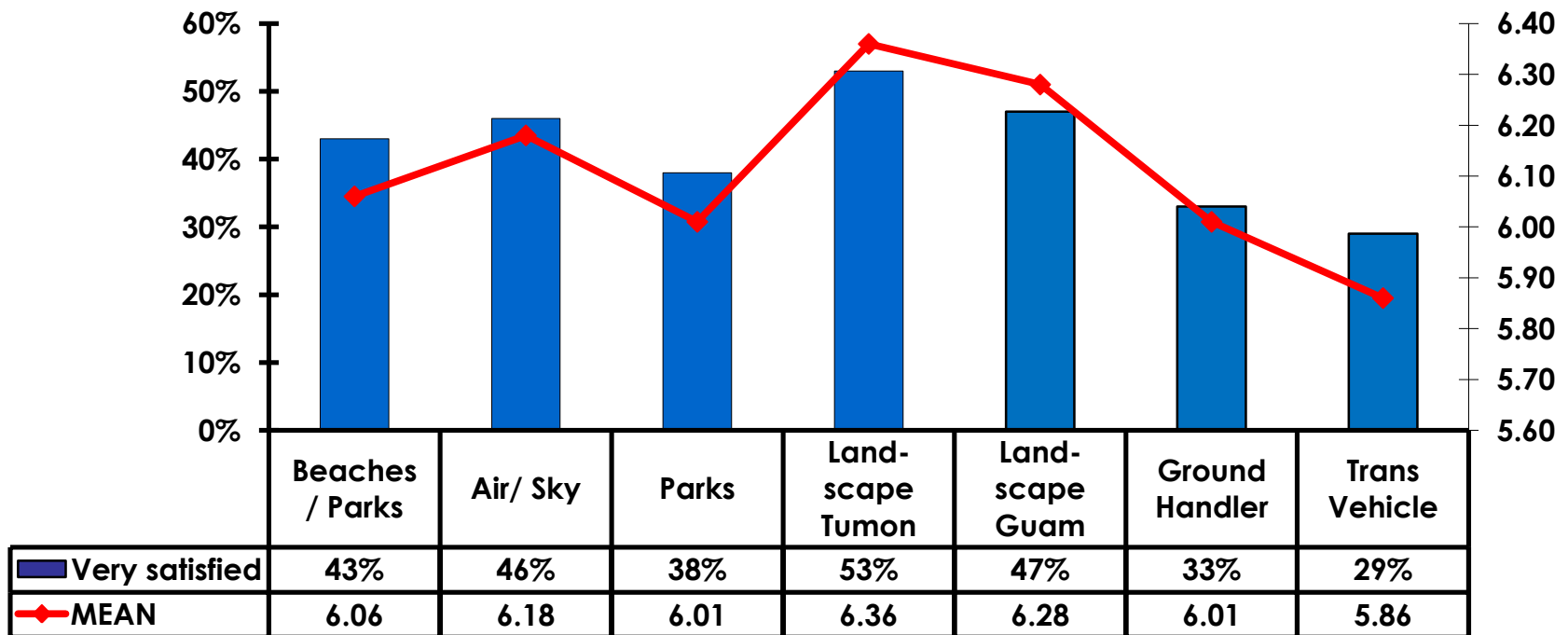
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

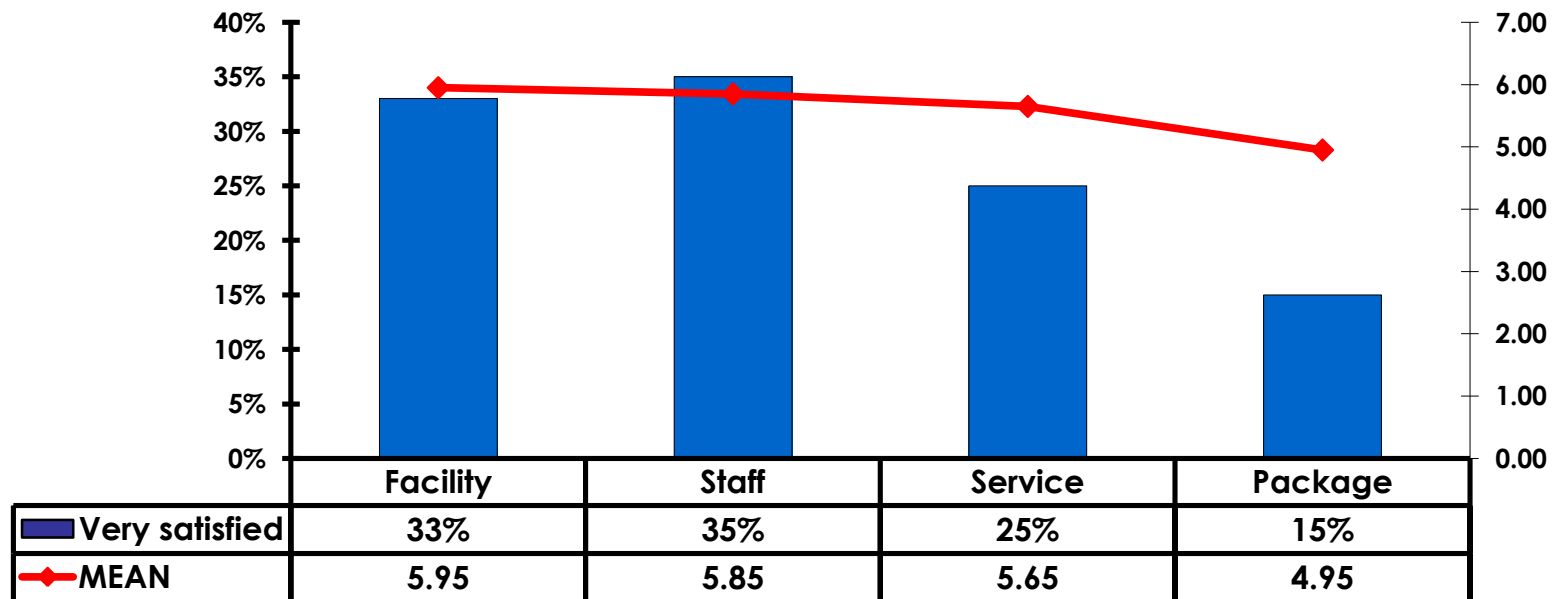
7=Very Satisfied/1=Very Dissatisfied



# Wedding Satisfaction Scores

7pt Rating Scale

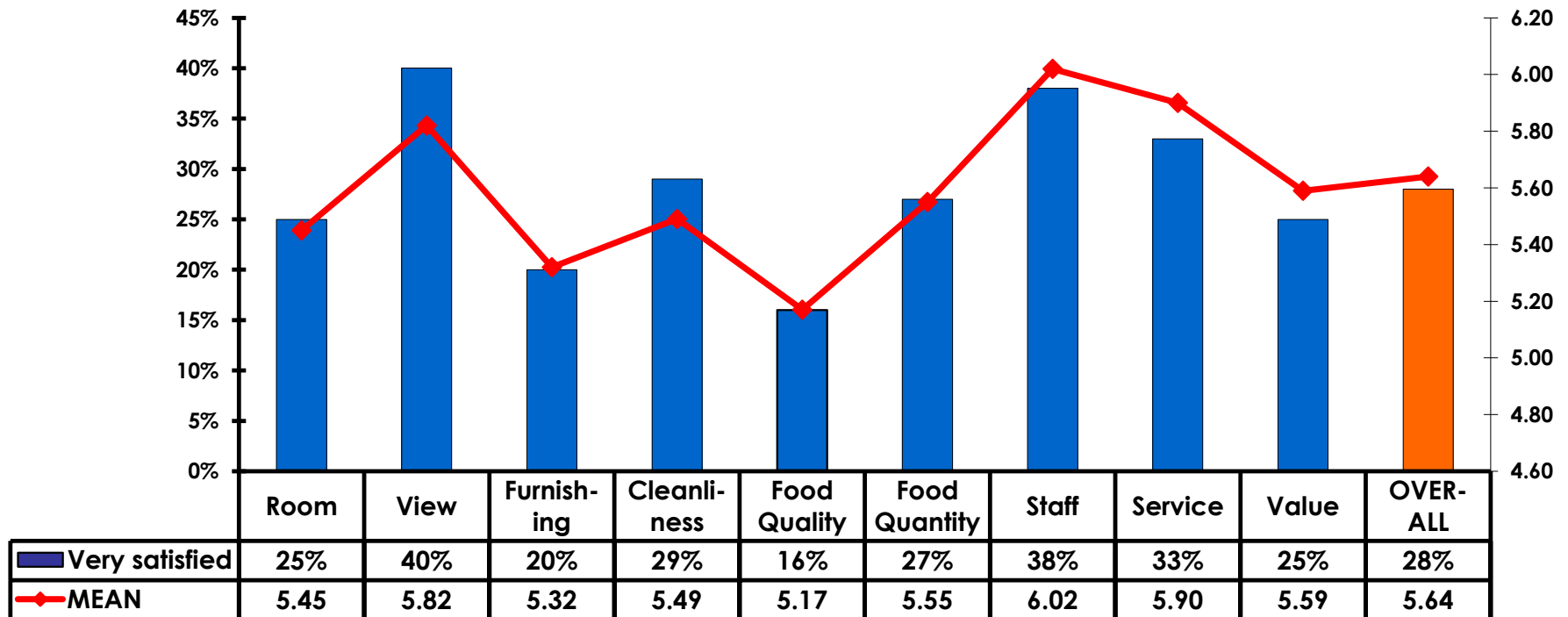
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

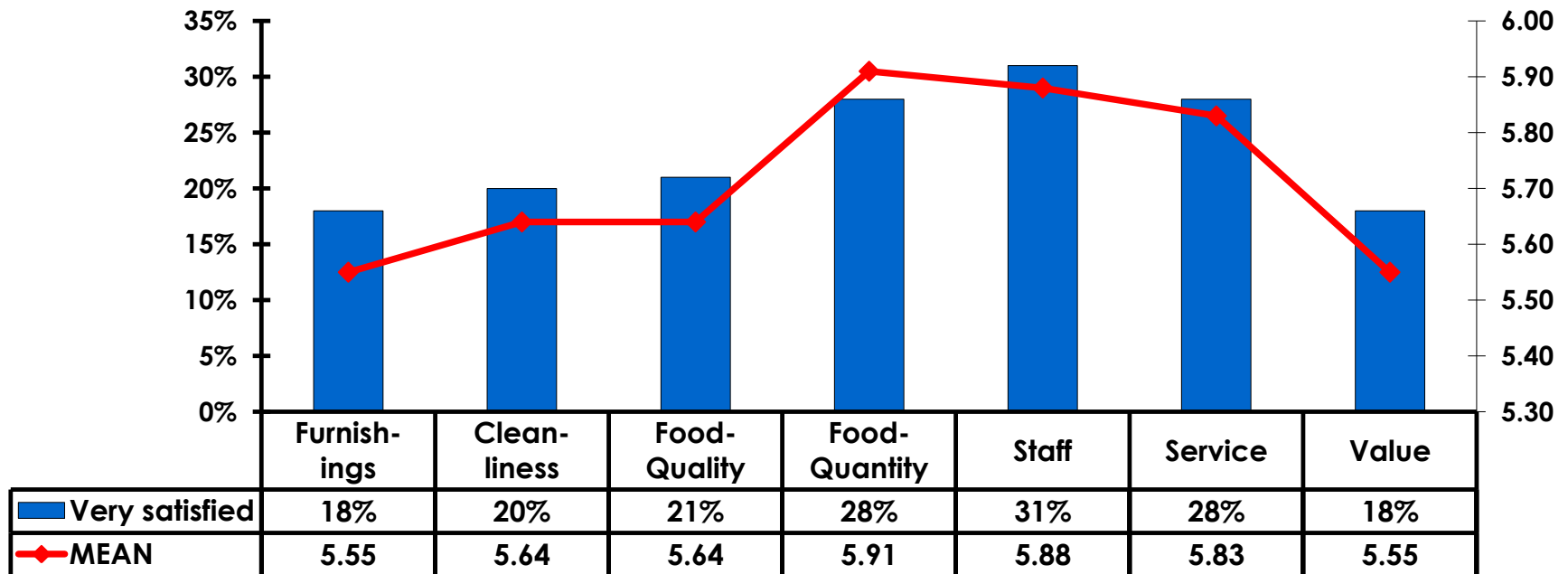
7=Very Satisfied/1=Very Dissatisfied



# 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

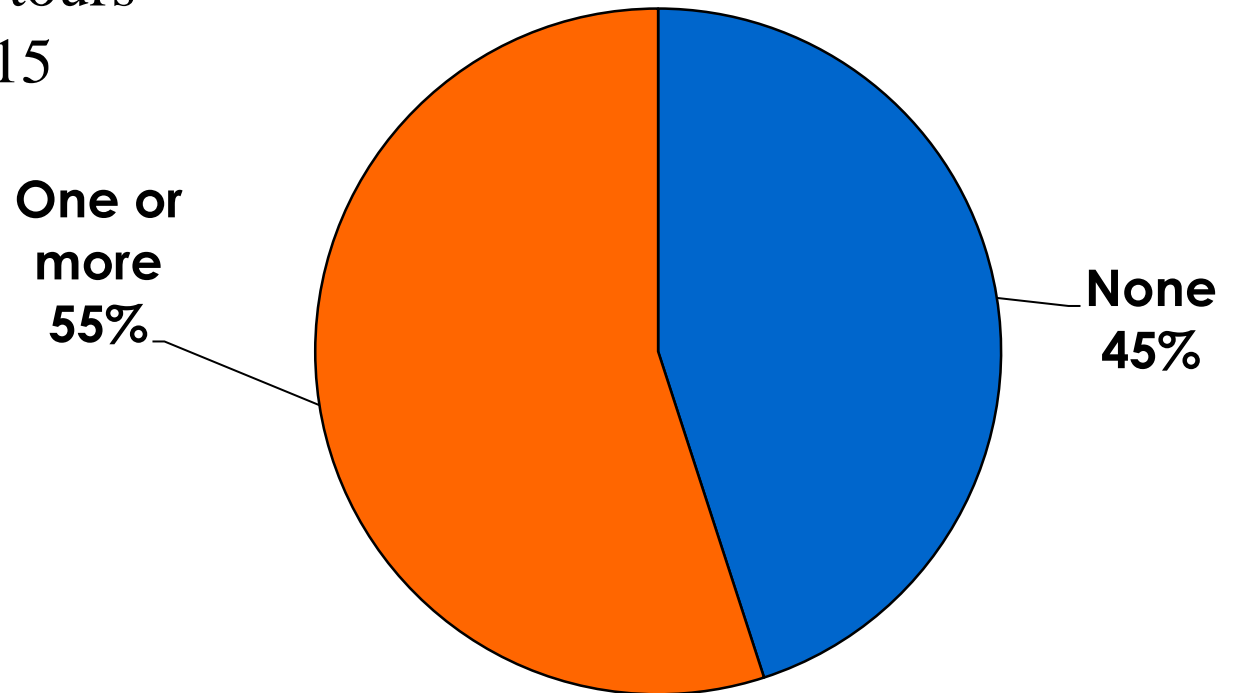
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>71%</b>	Score of 6 to 7 = <b>64%</b>
Score of 4 to 5 = <b>27%</b>	Score of 4 to 5 = <b>33%</b>
Score 1 to 3 = <b>10%</b>	Score 1 to 3 = <b>3%</b>
<b>MEAN = 5.90</b>	<b>MEAN = 5.74</b>



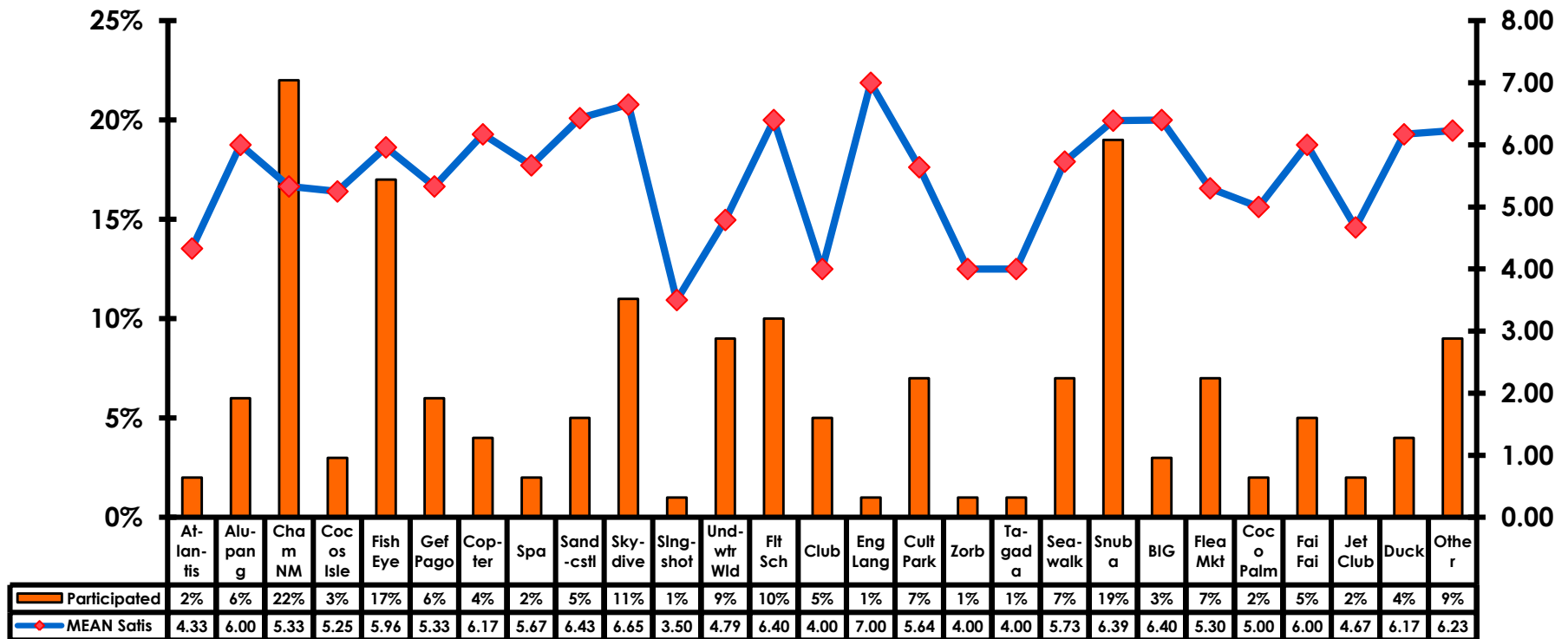
# Optional Tour Participation

- Average number of tours participated in is 1.15



# 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>82%</b>	Score of 6 to 7 = <b>77%</b>
Score of 4 to 5 = <b>18%</b>	Score of 4 to 5 = <b>22%</b>
Score 1 to 3 = <b>%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 6.08</b>	<b>MEAN = 6.02</b>

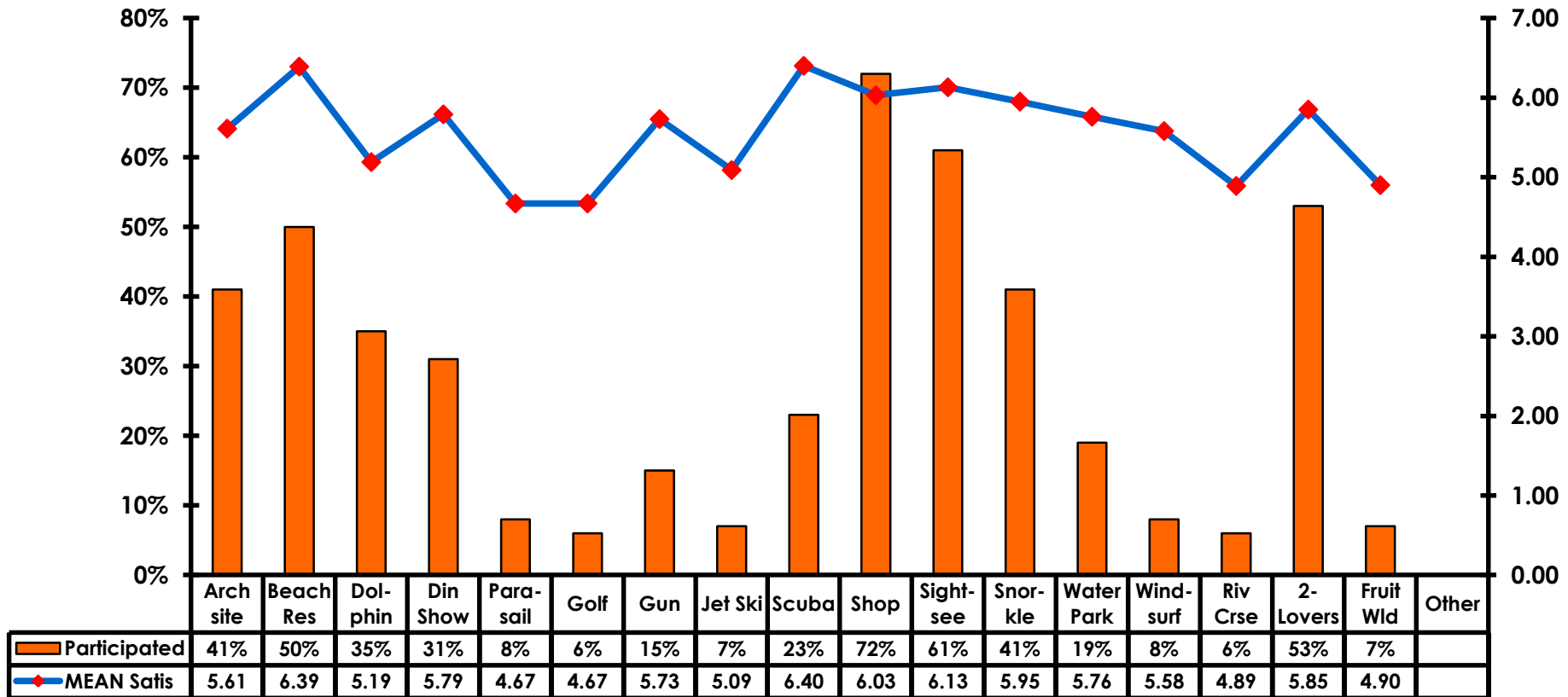
# Night Tours Satisfaction

7pt Rating Scale

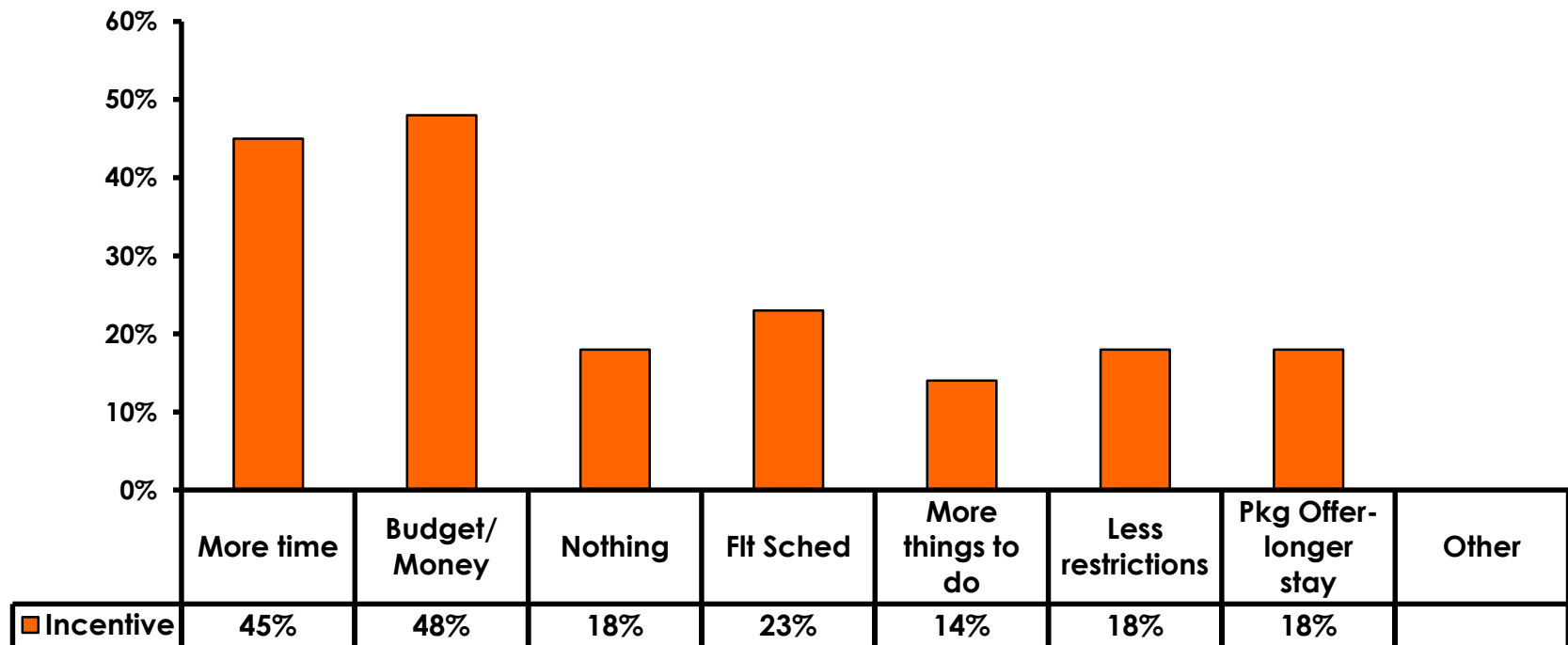
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>65%</b>	Score of 6 to 7 = <b>61%</b>
Score of 4 to 5 = <b>32%</b>	Score of 4 to 5 = <b>38%</b>
Score 1 to 3 = <b>2%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 5.68</b>	<b>MEAN = 5.69</b>

# Satisfaction with Other Activities



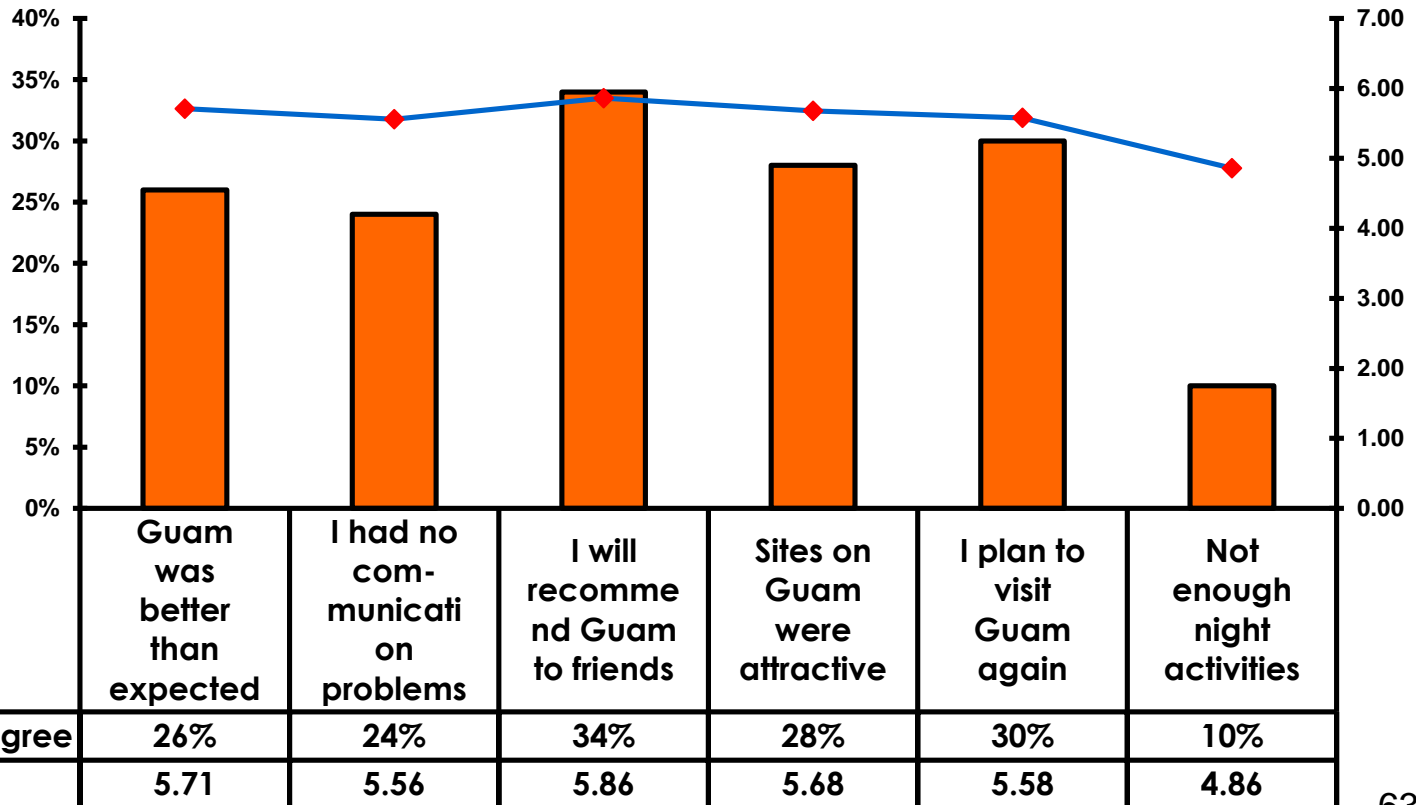
# What would it take to make you want to stay an extra day in Guam?



# On-Island Perceptions

7pt Rating Scale

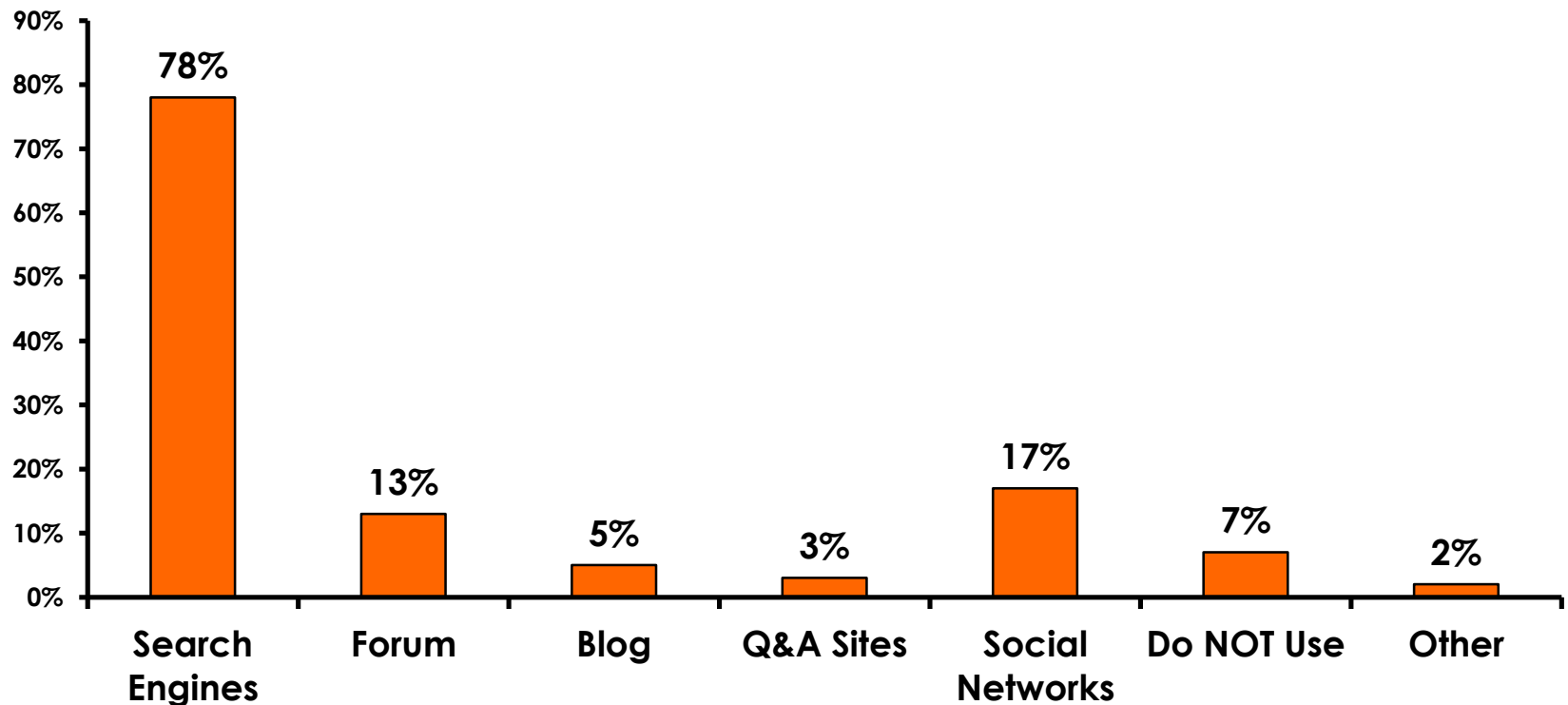
7=Very Satisfied/ 1=Very Dissatisfied



# SECTION 5 **PROMOTIONS**

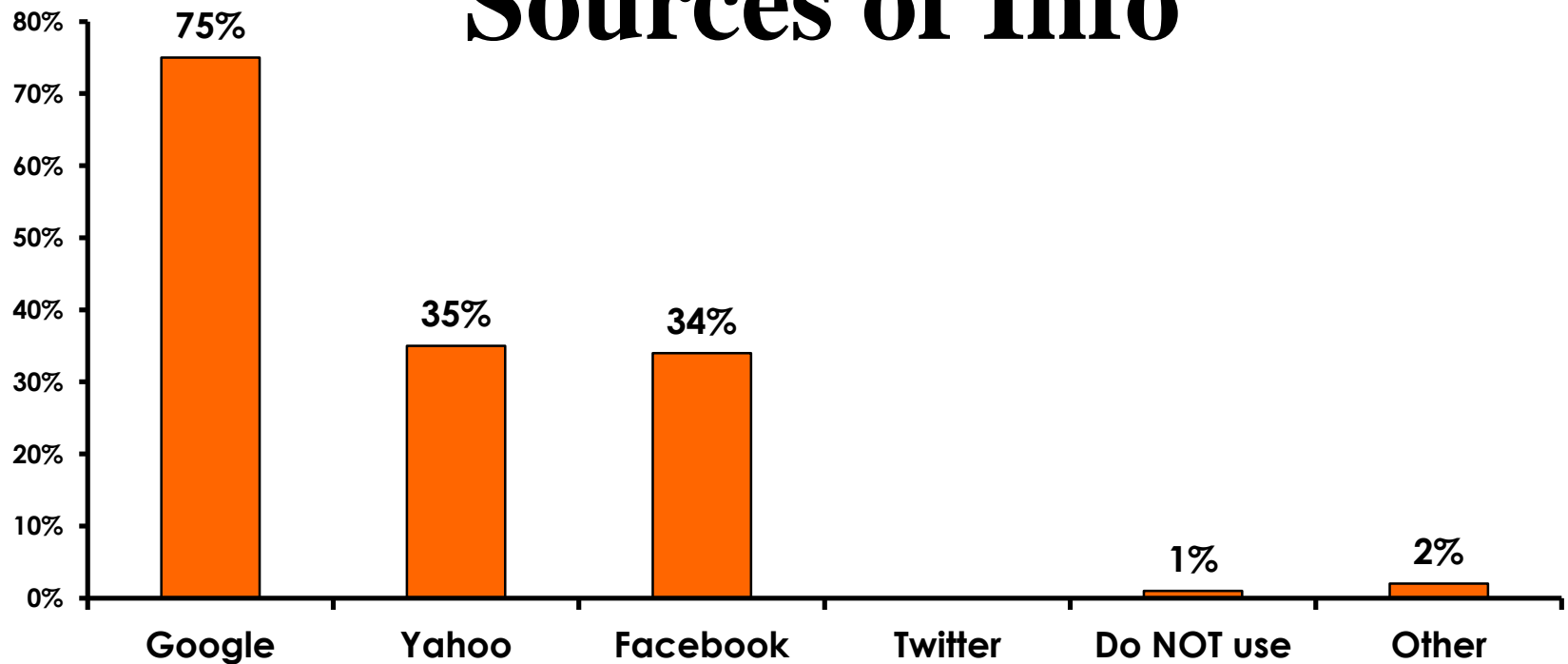


# Internet- Guam Sources of Info

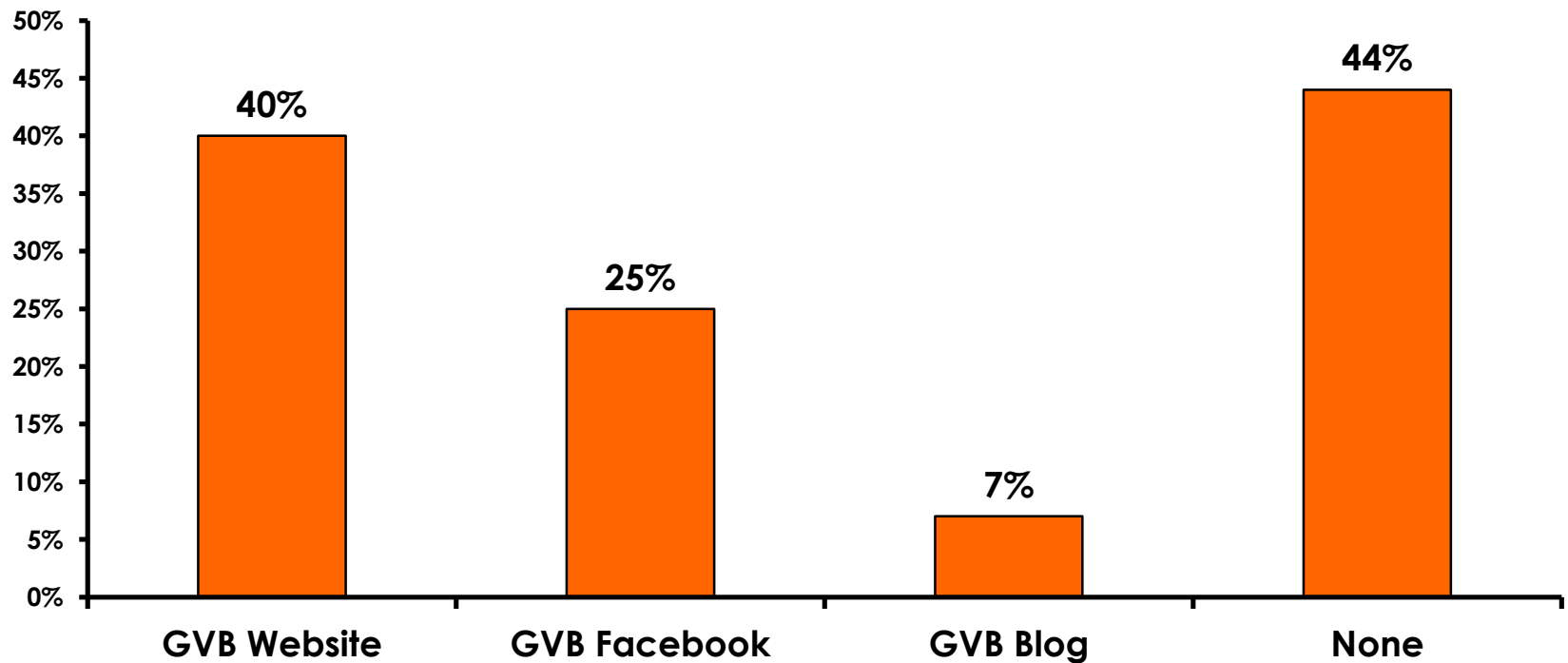


# Internet- Things To Do

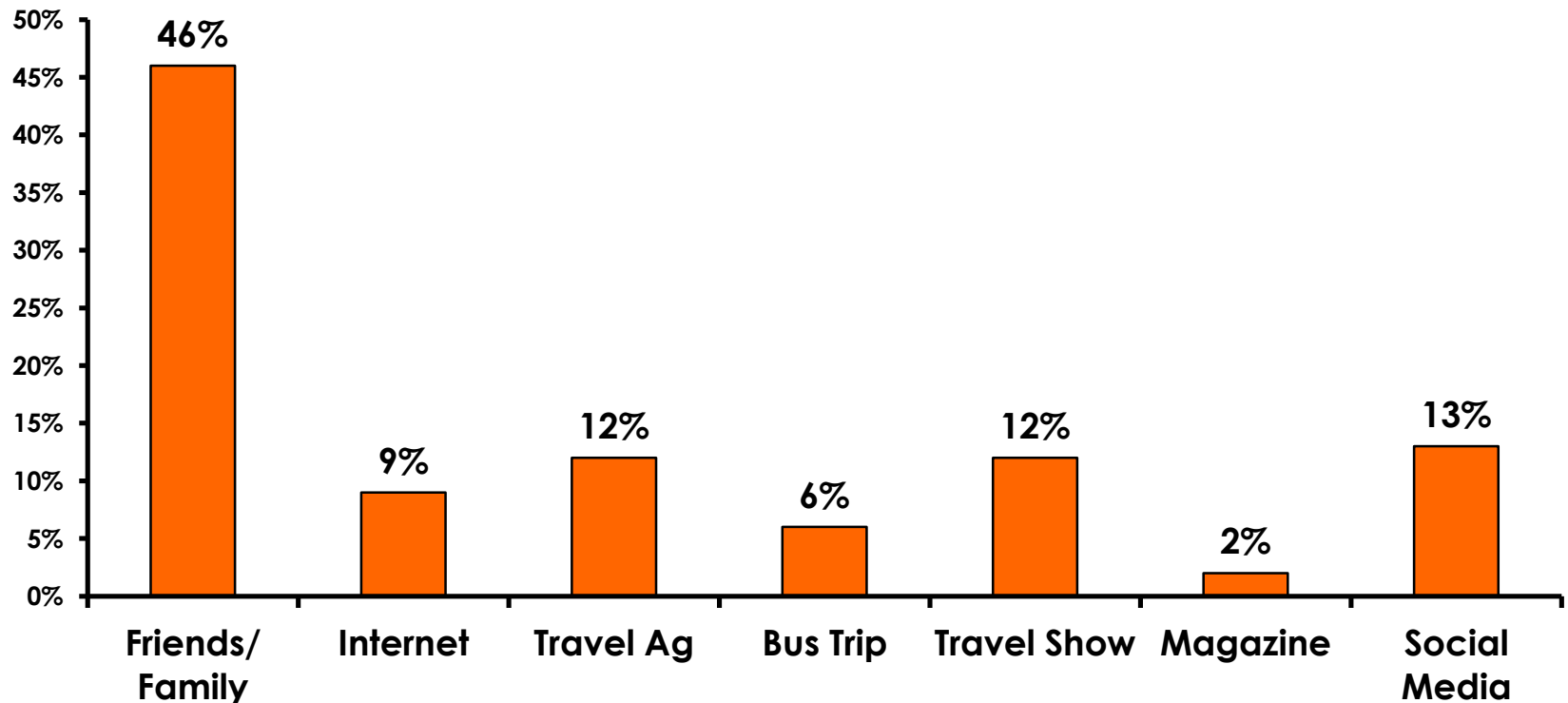
## Sources of Info



# Internet- GVB Sources

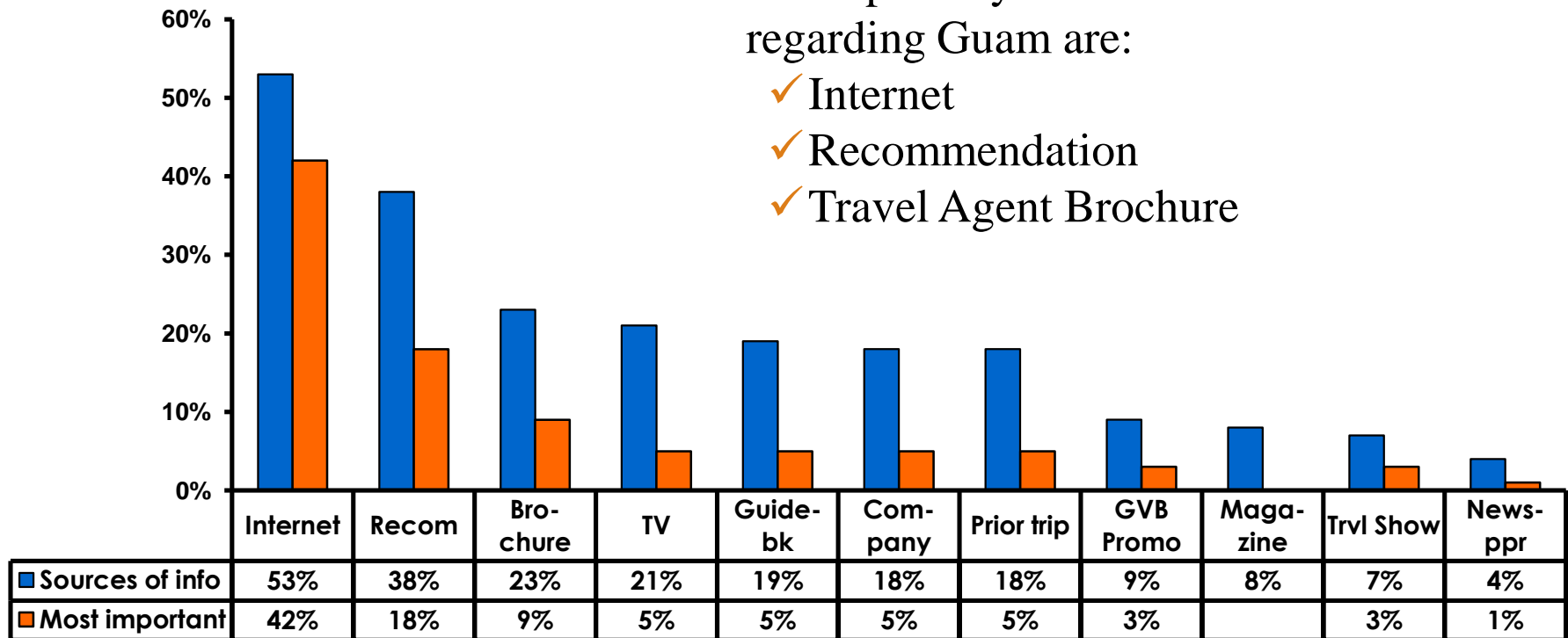


# Travel Motivation- Info Sources



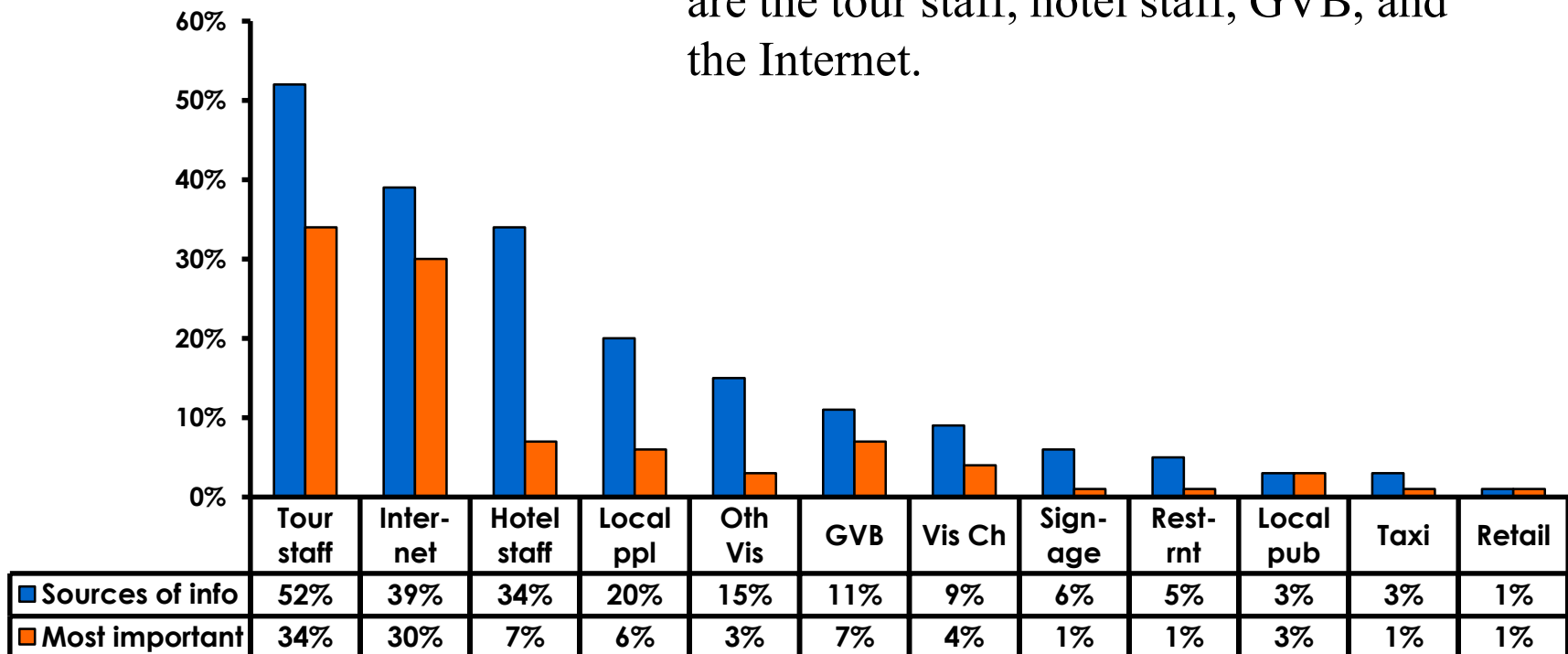
# Sources of Information Pre-arrival

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



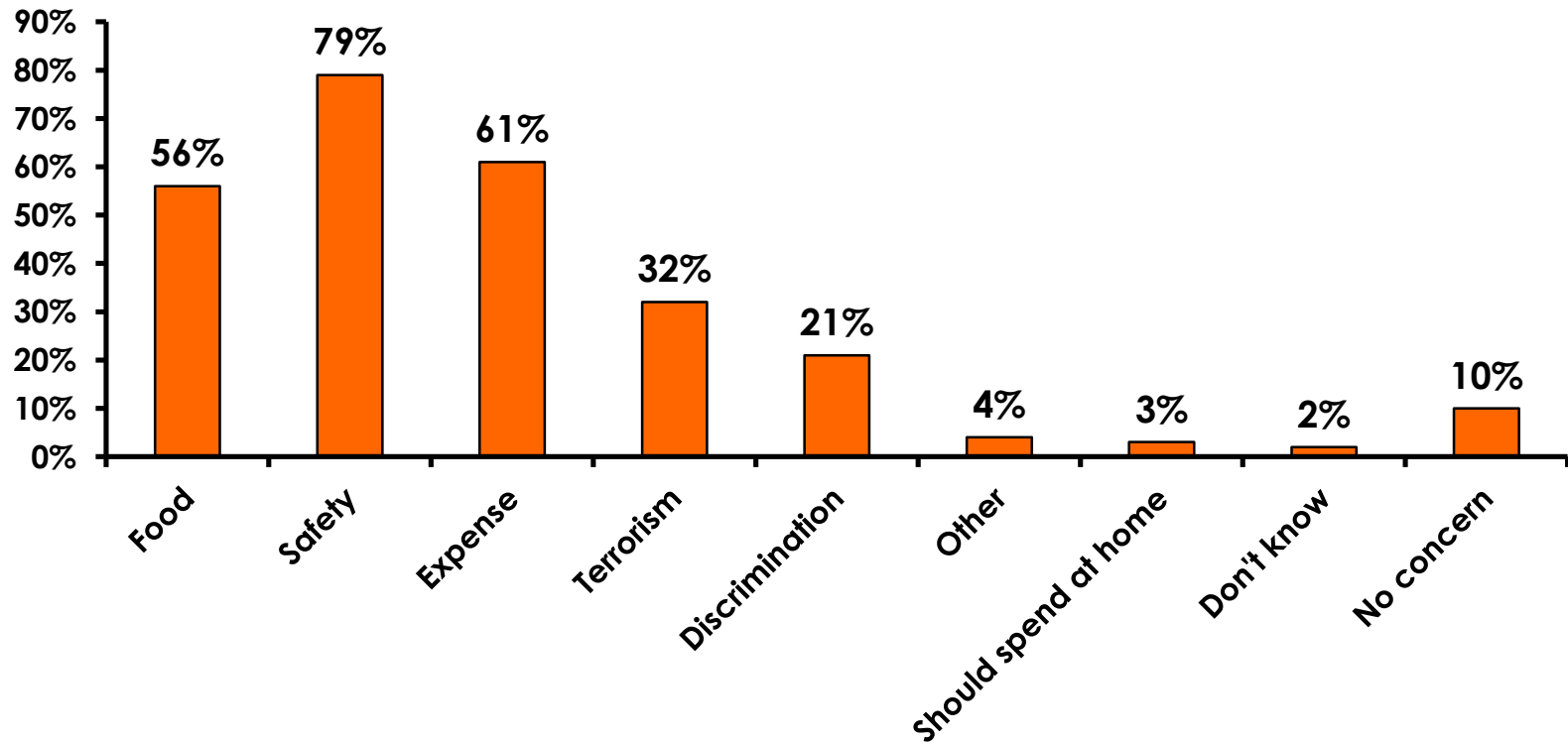
# Sources of Information Post-arrival

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



# SECTION 6 **OTHER ISSUES**

# Concerns about travel outside of Taiwan - Overall

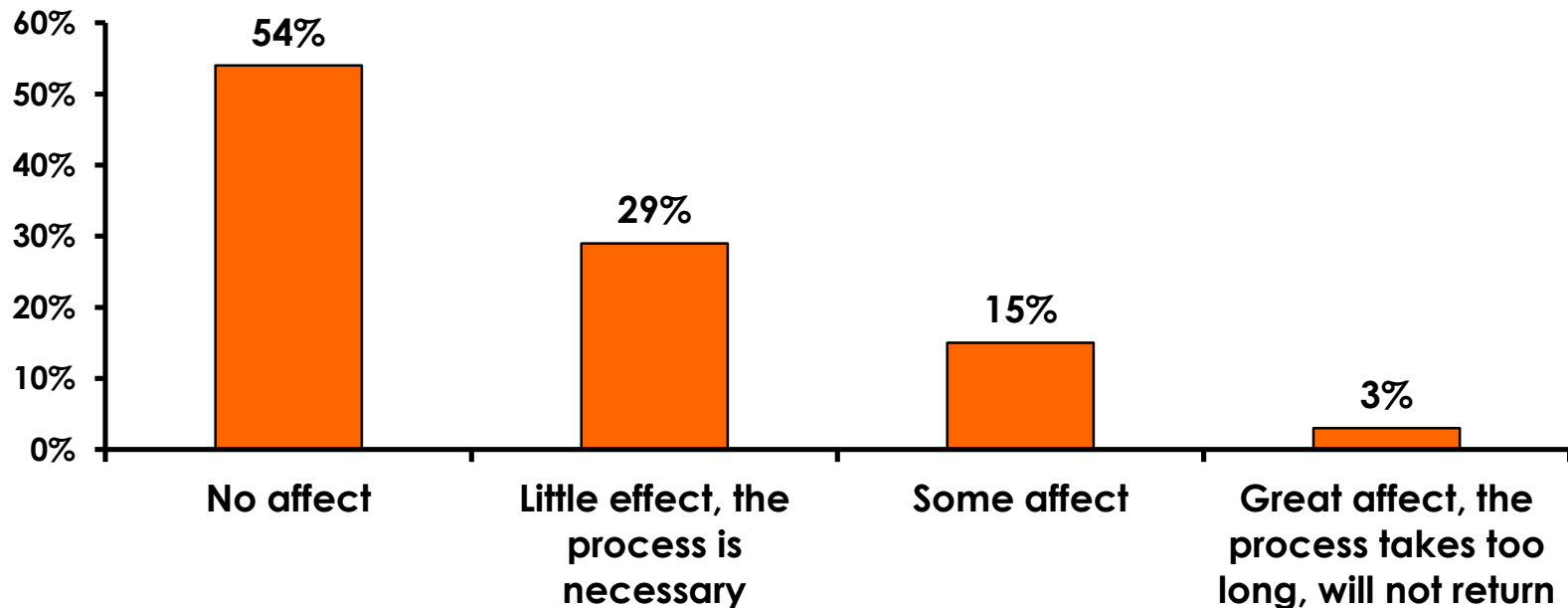




# Concerns about travel outside of Taiwan - By Age & Income

		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	79%	75%	82%	75%	80%	62%	60%	80%	93%	69%	88%	73%	100%	
	Expense	61%	69%	70%	47%	40%	77%	50%	60%	80%	65%	46%	50%	67%	
	Food	56%	44%	55%	59%	60%	62%	50%	40%	50%	58%	58%	54%	67%	
	Terrorism	32%	44%	28%	33%	20%	31%	40%	30%	40%	42%	17%	27%	33%	
	Discrimination against Taiwanese	21%	38%	23%	14%	20%	31%	10%	30%	20%	19%	17%	19%	67%	
	No concerns	10%	6%	5%	14%	40%	8%	30%			12%	8%	15%		
	Other	4%	6%	3%	6%		15%	10%	3%	8%					
	Should spend at home	3%		3%	4%				10%	3%		4%		33%	
	Don't know	2%		3%	2%				3%	4%		4%			
	Total	Count	147	16	74	51	5	13	10	10	30	26	24	26	3

# Security Screening/ Immigration Process at Guam International Airport



# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

