

Guam Visitors Bureau

Taiwan Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

QTR.1 (OCTOBER – DECEMBER 2016)

Prepared by: Anthology Research

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Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Taiwanese 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 +/- 8.00 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 +/- 8.00 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.

Key Highlighted Segments

- **The specific objectives were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)
 - Sports/ Adventure Traveler (Q5A Organized sporting activity/ Scuba/ Water sports, Q18 Skydiving, Q19 Scuba, snorkel, windsurf)
 - Wedding (Q5A)
 - Honeymoon (Q5A)
 - To identify the most significant factors affecting overall visitor satisfaction.
 - To identify (for all Taiwanese visitors) the most important determinants of on-island spending

Key Highlighted Segments

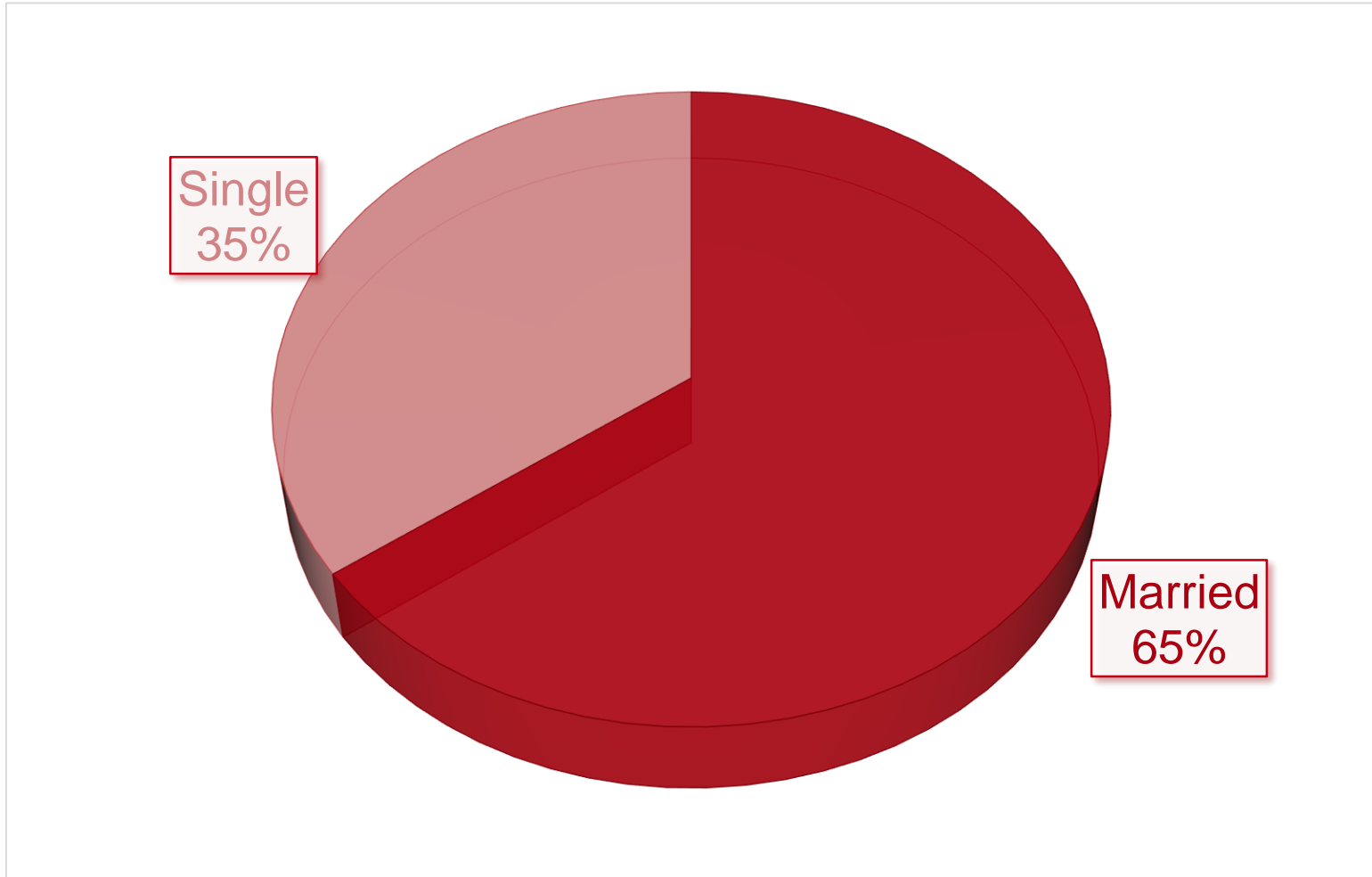


	Qtr1 (Oct16- Dec16)	Qtr2 (Jan17- Mar17)	Qtr3 (Apr17- Jun17)	Qtr4 (Jul17- Sept17)
—●— MICE	2%			
—●— Sports/ Adventure	57%			
—●— Honeymoon	13%			
—●— Wedding	7%			

SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2017 Tracking



Marital status – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

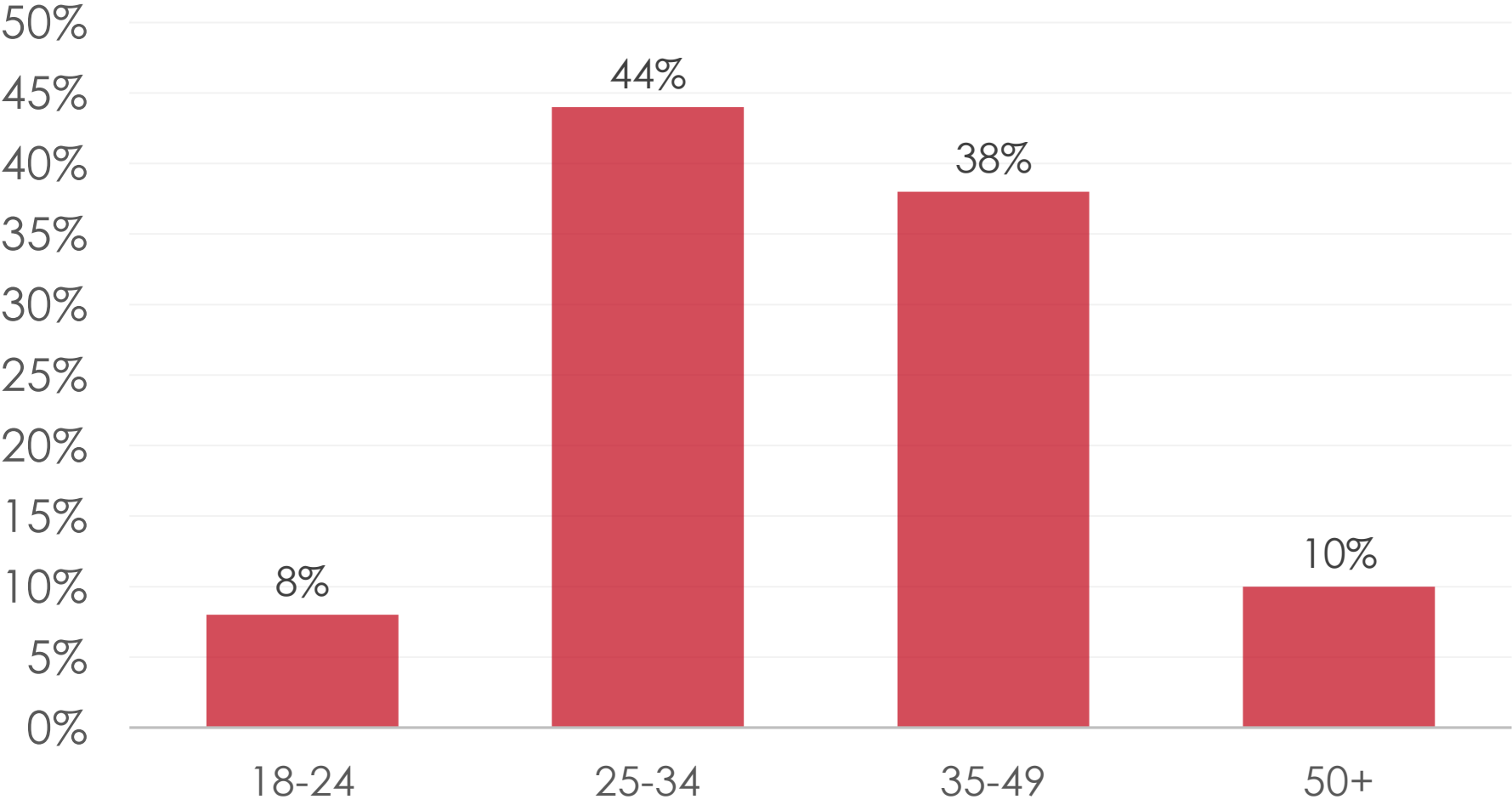
QE Are you married or single?

		TOTAL	MICE	SPORTS/ ADVENTURE	WEDDING	HONEYMOON
		-	-	-	-	-
QE	Married	65%	100%	61%	50%	95%
	Single	35%		39%	50%	5%
	Total	150	3	85	10	20

Prepared by QMark Research

Age

MEAN = 36.24
MEDIAN = 34



Age – FY2017 Tracking



	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	36.24			
MEDIAN	34			

Age – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

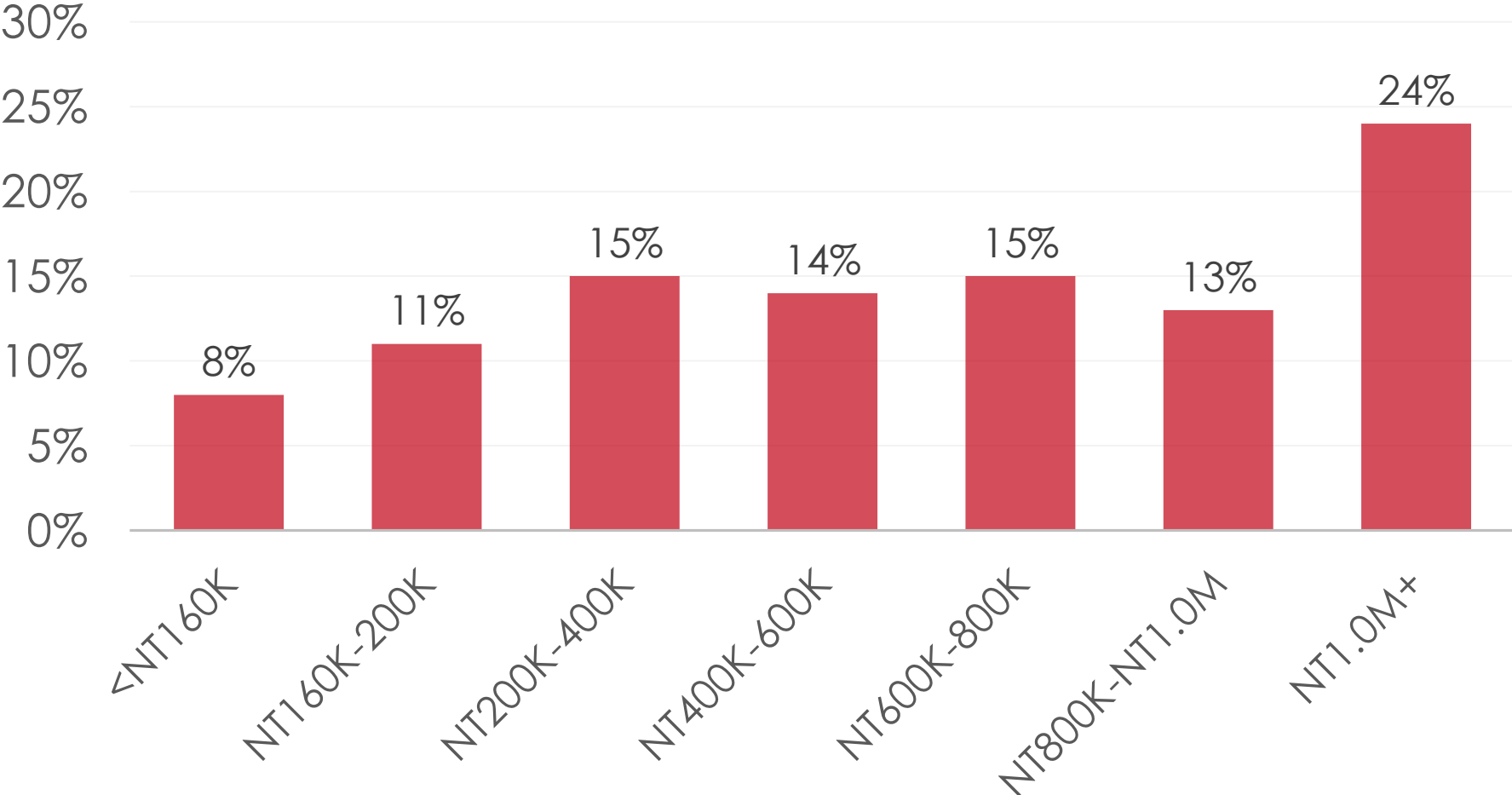
QF And what was your age on your last birthday?

		TOTAL	MICE	SPORTS/ ADVENTURE	WEDDING	HONEYMOON
		-	-	-	-	-
QF	18-24	8%		12%		5%
	25-34	44%		49%	60%	85%
	35-49	38%	33%	33%	40%	10%
	50+	10%	67%	6%		
	Total	150	3	85	10	20
QF	Mean	36.24	51.00	33.78	34.10	29.20
	Median	34	56	32	34	29

Prepared by QMark Research

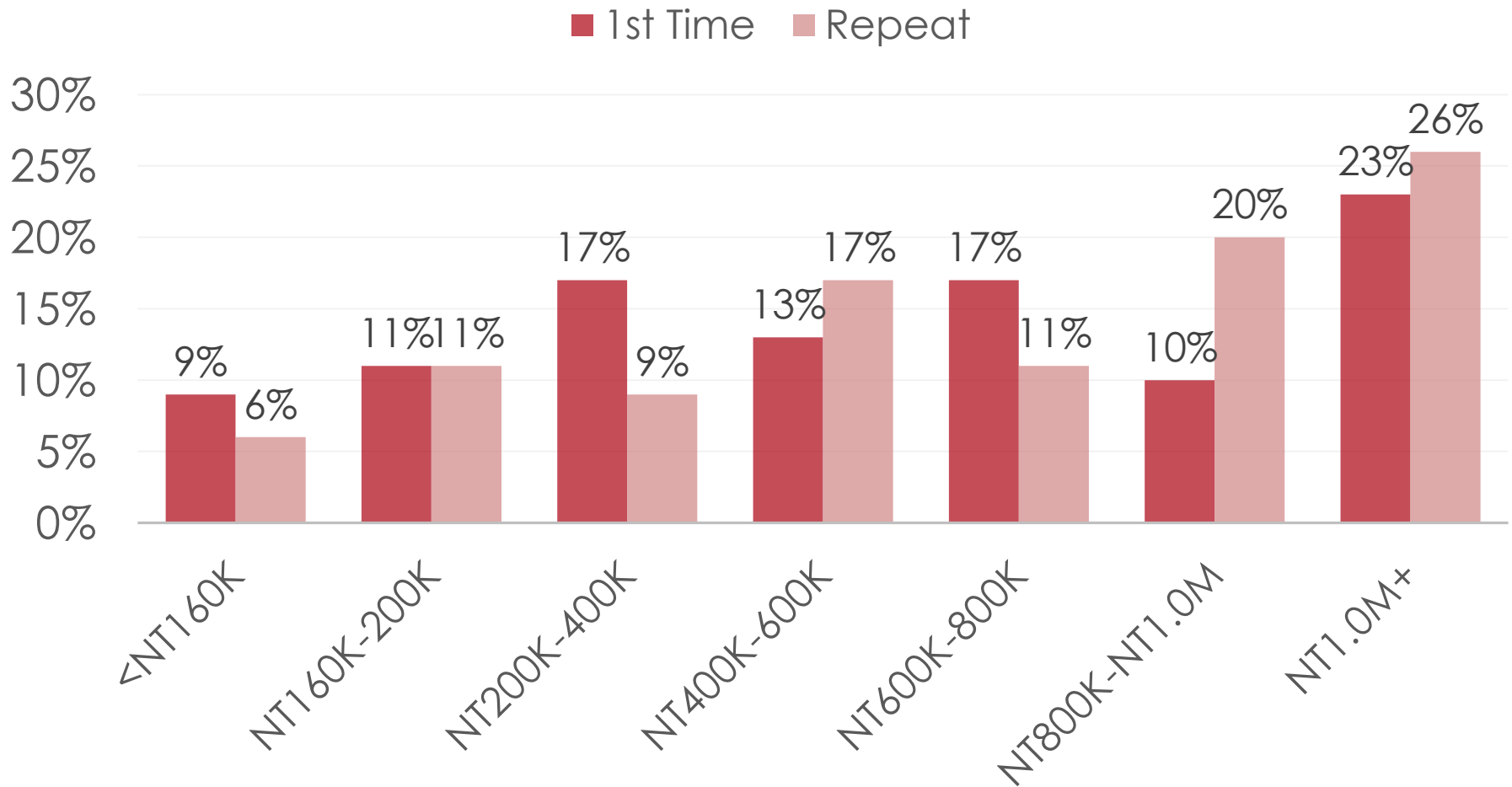
Annual Household Income

EXCHANGE RATE NT31.73=\$1



Annual Household Income

EXCHANGE RATE NT31.73=\$1



Annual Household Income – Key Segments

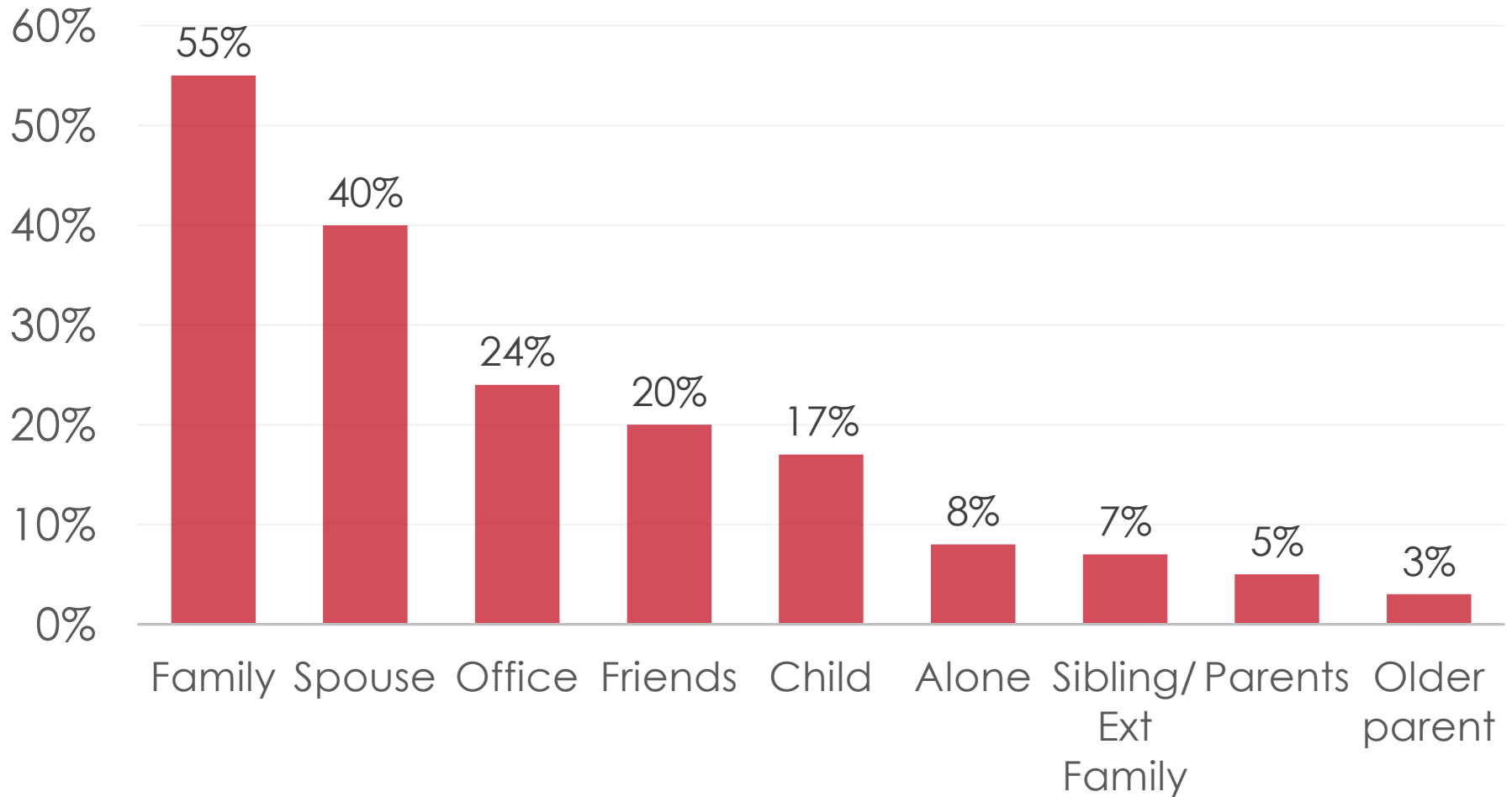
GUAM VISITORS BUREAU - EXIT SURVEY

Q26 What is your approximate annual household income before taxes?

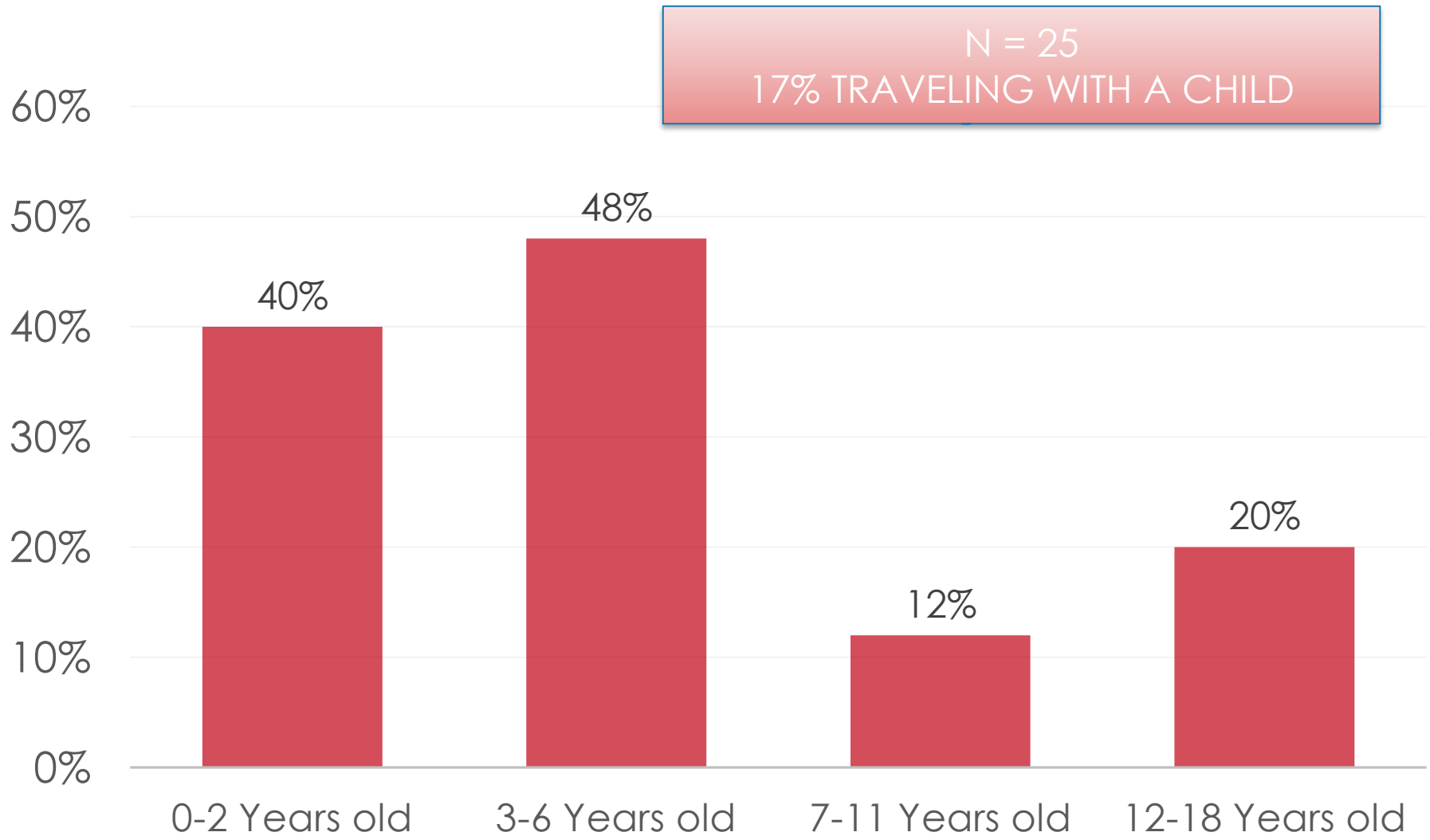
		TOTAL	MICE	SPORTS/ ADVENTURE	WEDDING	HONEYMOON
		-	-	-	-	N
Q26	<=NT160K	8%		8%		30%
	NT160K-NT200K	11%	33%	12%	20%	15%
	NT200K-NT400K	15%		15%		25%
	NT400K-NT600K	14%		18%	20%	15%
	NT600K-NT800K	15%		14%	40%	10%
	NT800K-NT1.0M	13%		12%		5%
	NT1.0M+	24%	67%	21%	20%	
	Total	150	3	85	10	20

Prepared by QMark Research

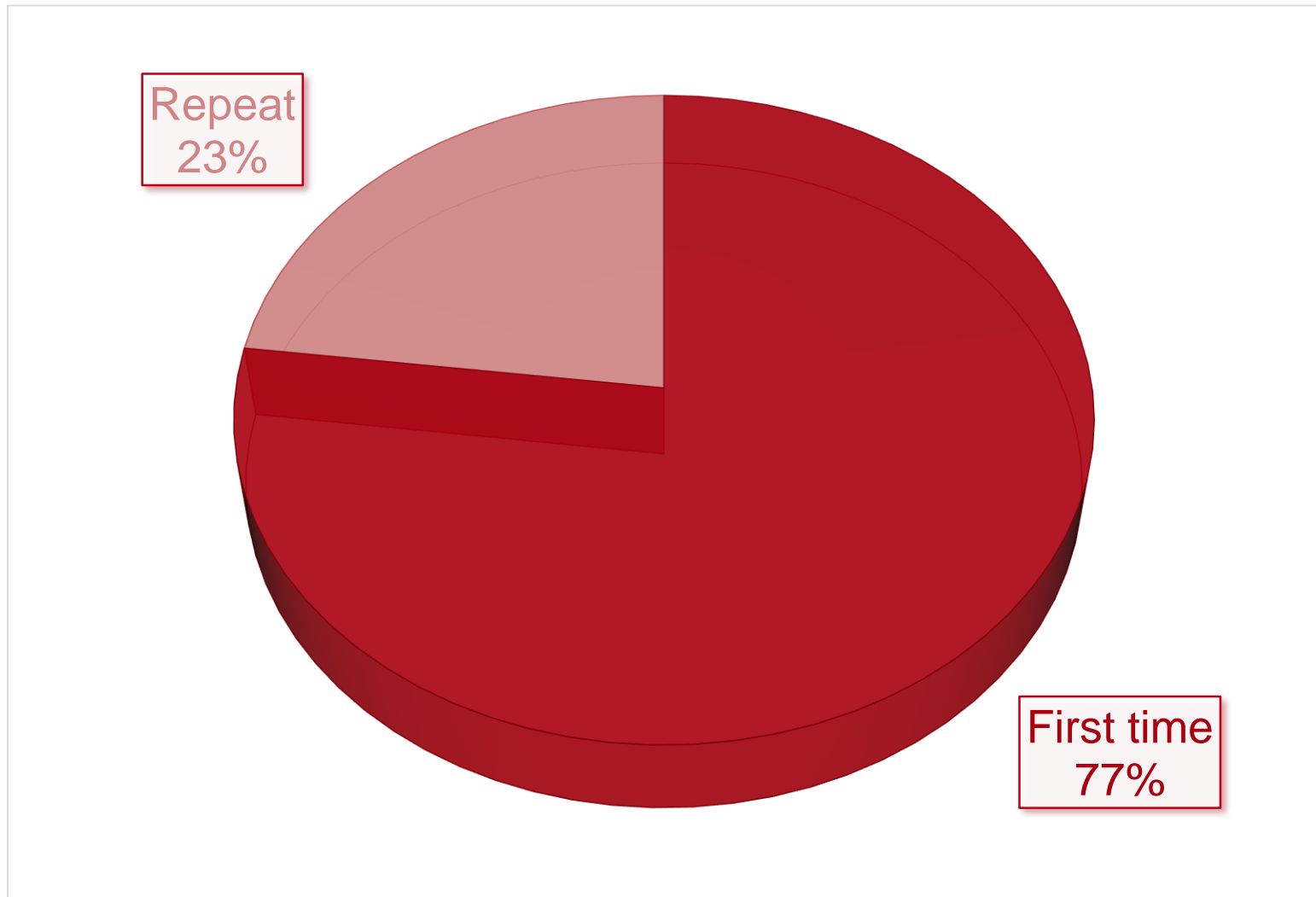
Travel Party



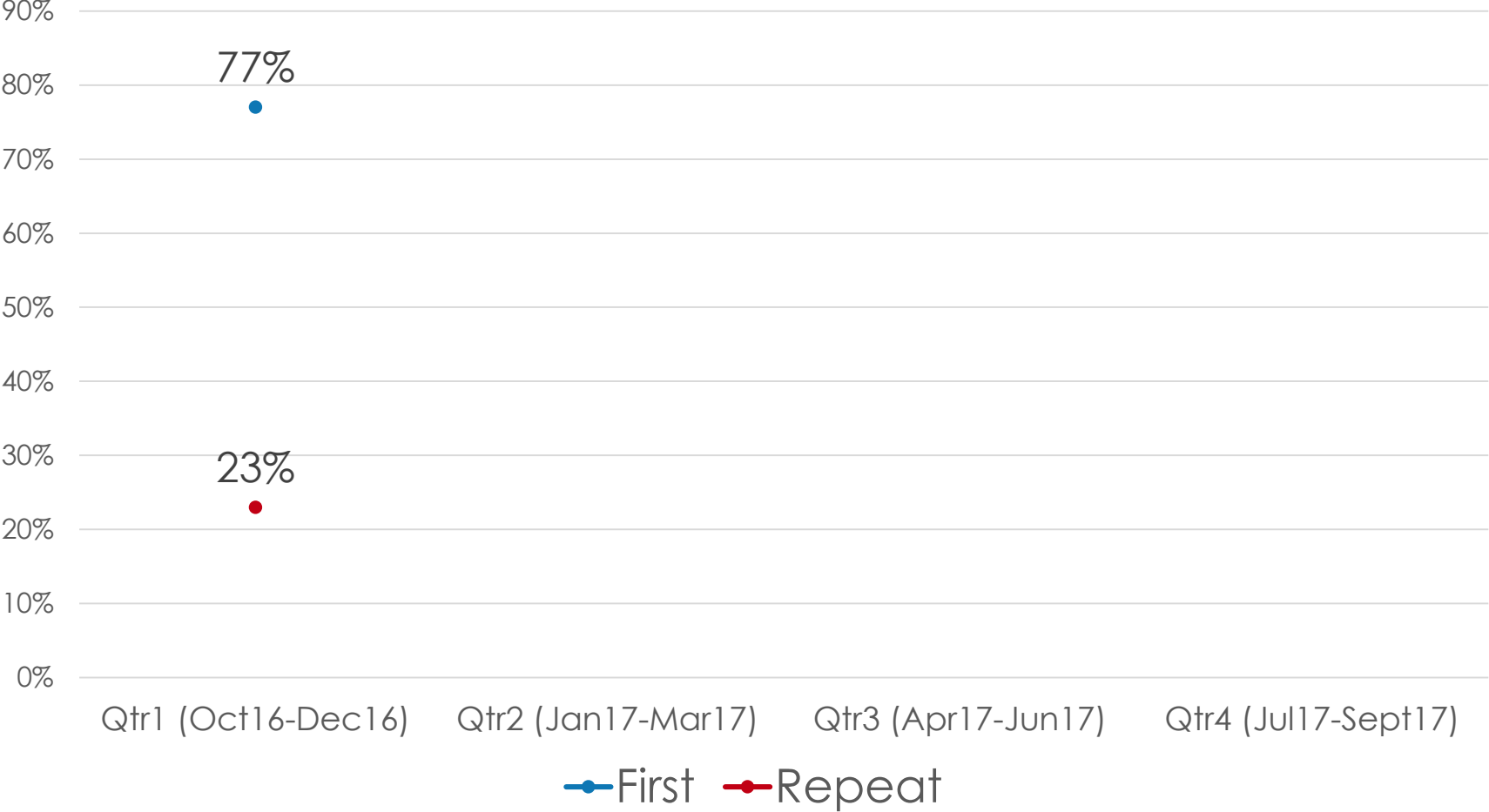
Travel Party - Children



Trips to Guam



Trips to Guam – FY2017 Tracking



Trips to Guam – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

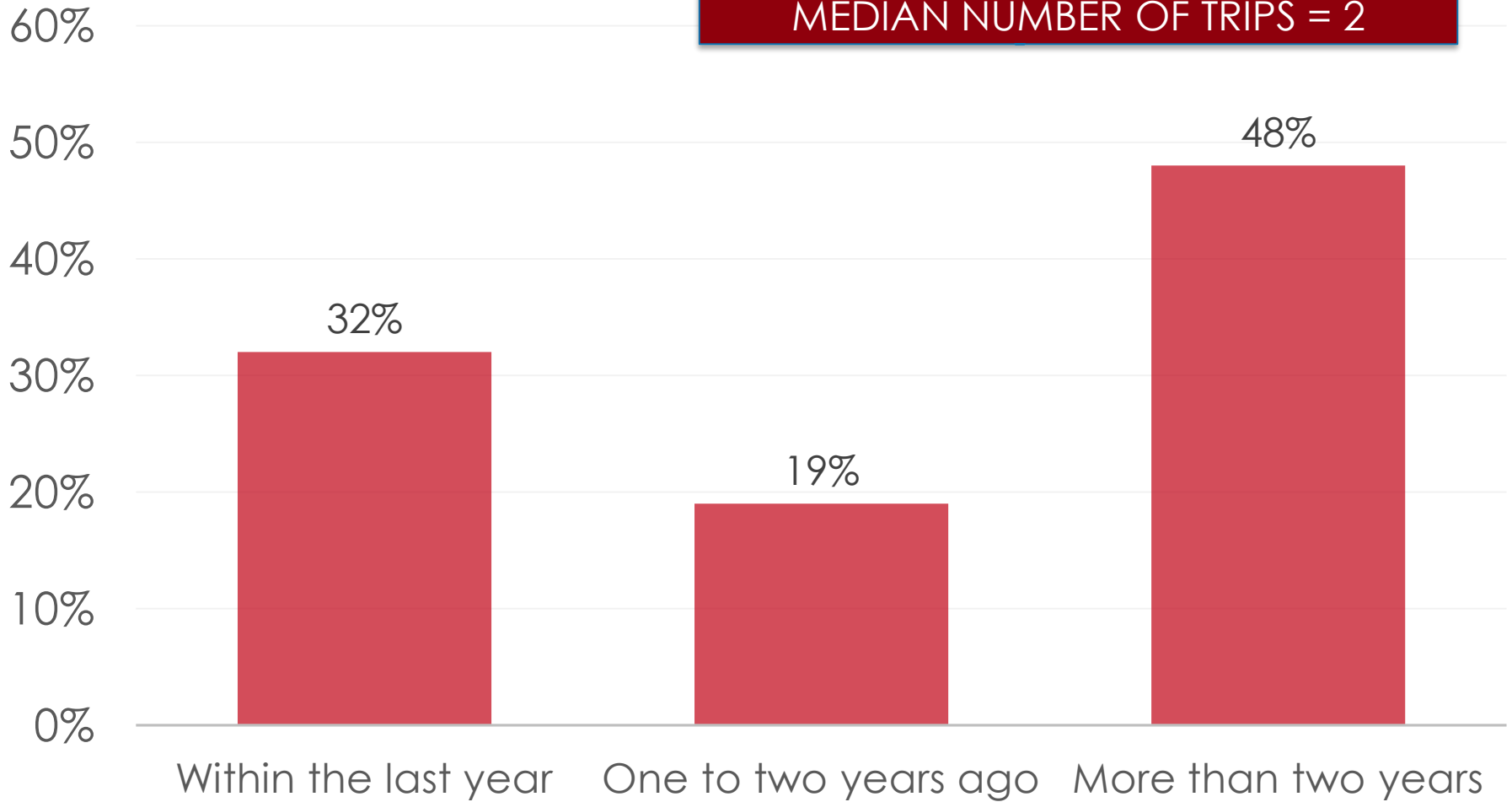
Q3A Is this your first trip to Guam?

		TOTAL	MICE	SPORTS/ ADVENTURE	WEDDING	HONEYMOON
		-	-	-	-	-
Q3A	Yes	77%	67%	85%	90%	90%
	No	23%	33%	15%	10%	10%
	Total	150	3	85	10	20

Prepared by QMark Research

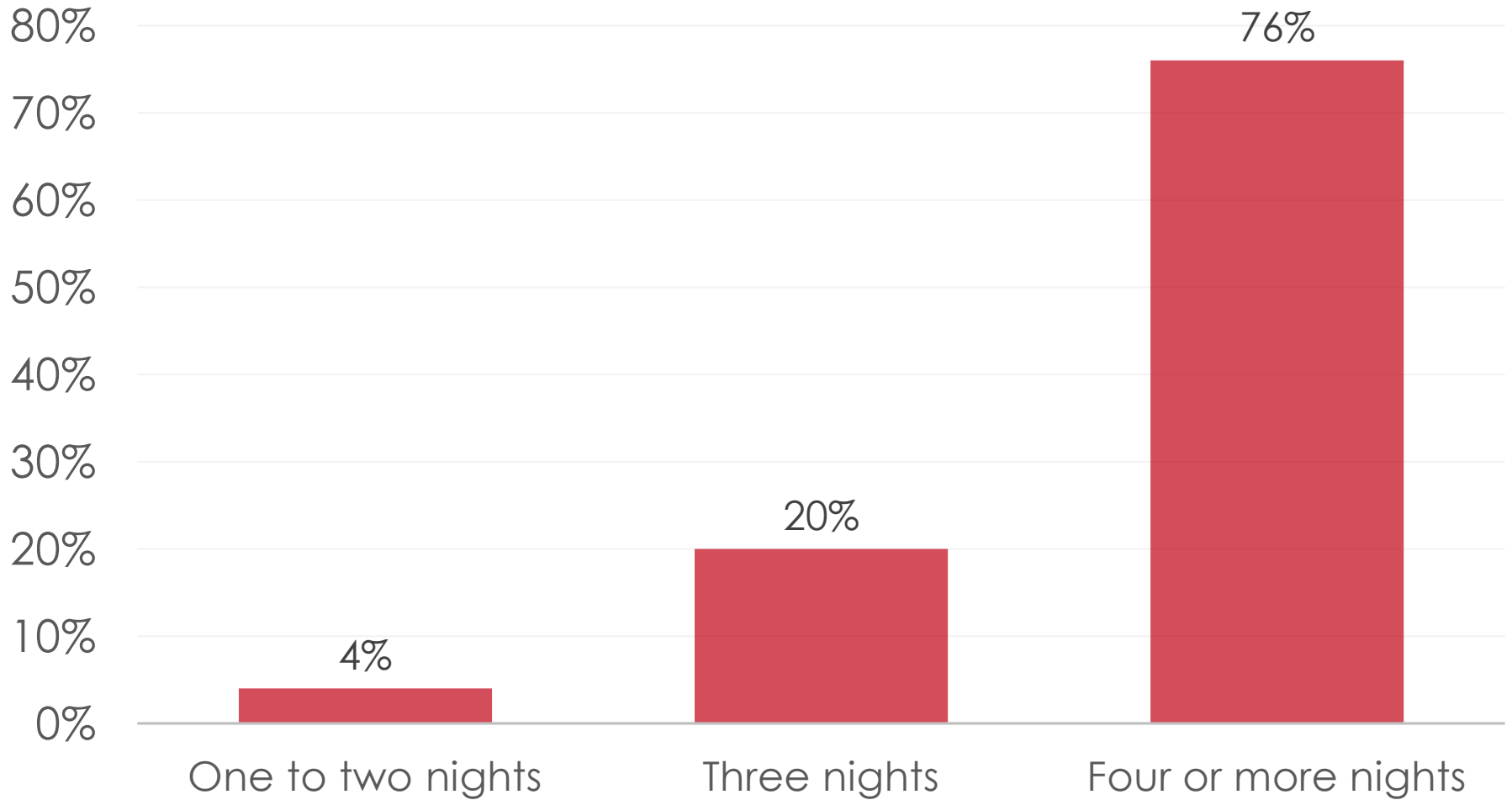
Repeat Visitor- Most Recent Trip

N = 31
MEAN NUMBER OF TRIPS = 2.55
MEDIAN NUMBER OF TRIPS = 2



Length of Stay

MEAN NUMBER OF NIGHTS = 3.95
MEDIAN NUMBER OF NIGHTS = 4



Length of Stay – FY2017 Tracking



	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	3.95			
MEDIAN	4			

Length of Stay – Key Segments

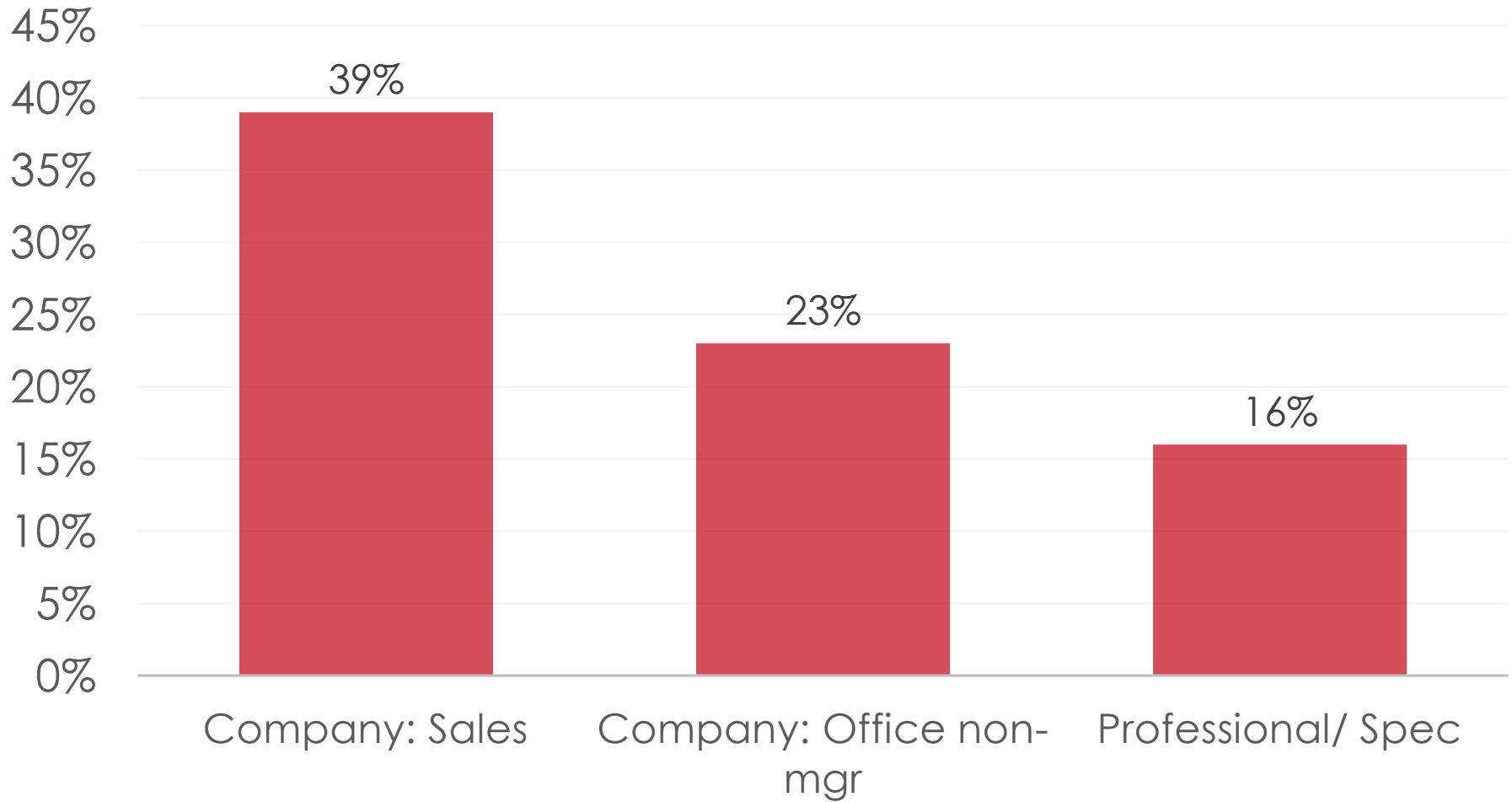
GUAM VISITORS BUREAU - EXIT SURVEY

Q8 How many nights did you stay on Guam?

		TOTAL	MICE	SPORTS/ ADVENTURE	WEDDING	HONEYMOON
		-	-	-	-	N
Q8	1-2	4%				
	3	20%		18%	20%	11%
	4+	76%	100%	82%	80%	89%
	Total	146	3	84	10	19
Q8	Mean	3.95	4.00	4.06	3.80	4.53
	Median	4	4	4	4	5

Prepared by QMark Research

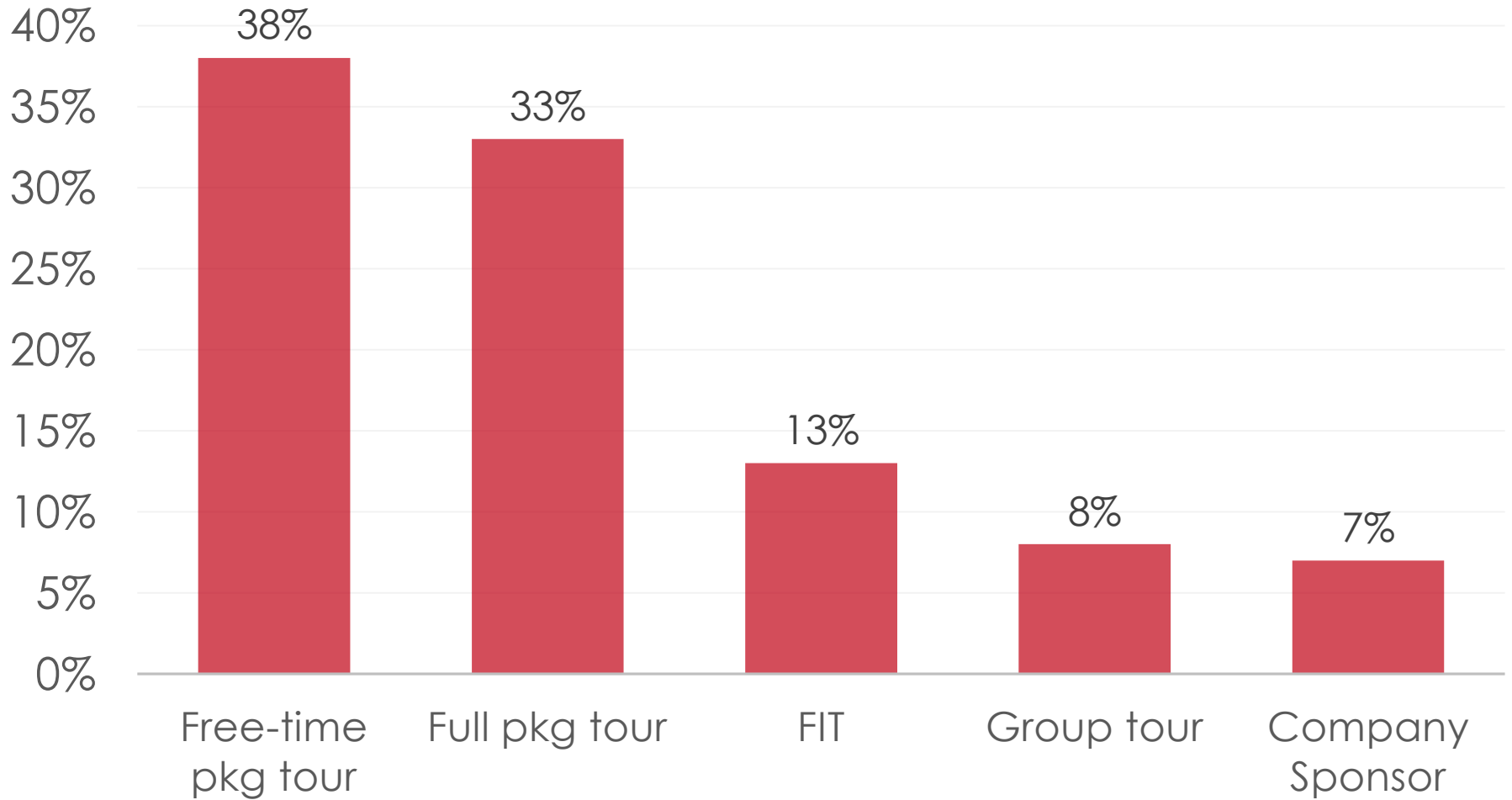
Occupation – Top Responses (10%+)



SECTION 2

TRAVEL PLANNING

Travel Planning



Travel Planning – FY2017 Tracking



	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
Free-time pkg tour	38%			
Full pkg tour	33%			
FIT	13%			
Company	7%			
Group	8%			

Travel Planning – Key Segments

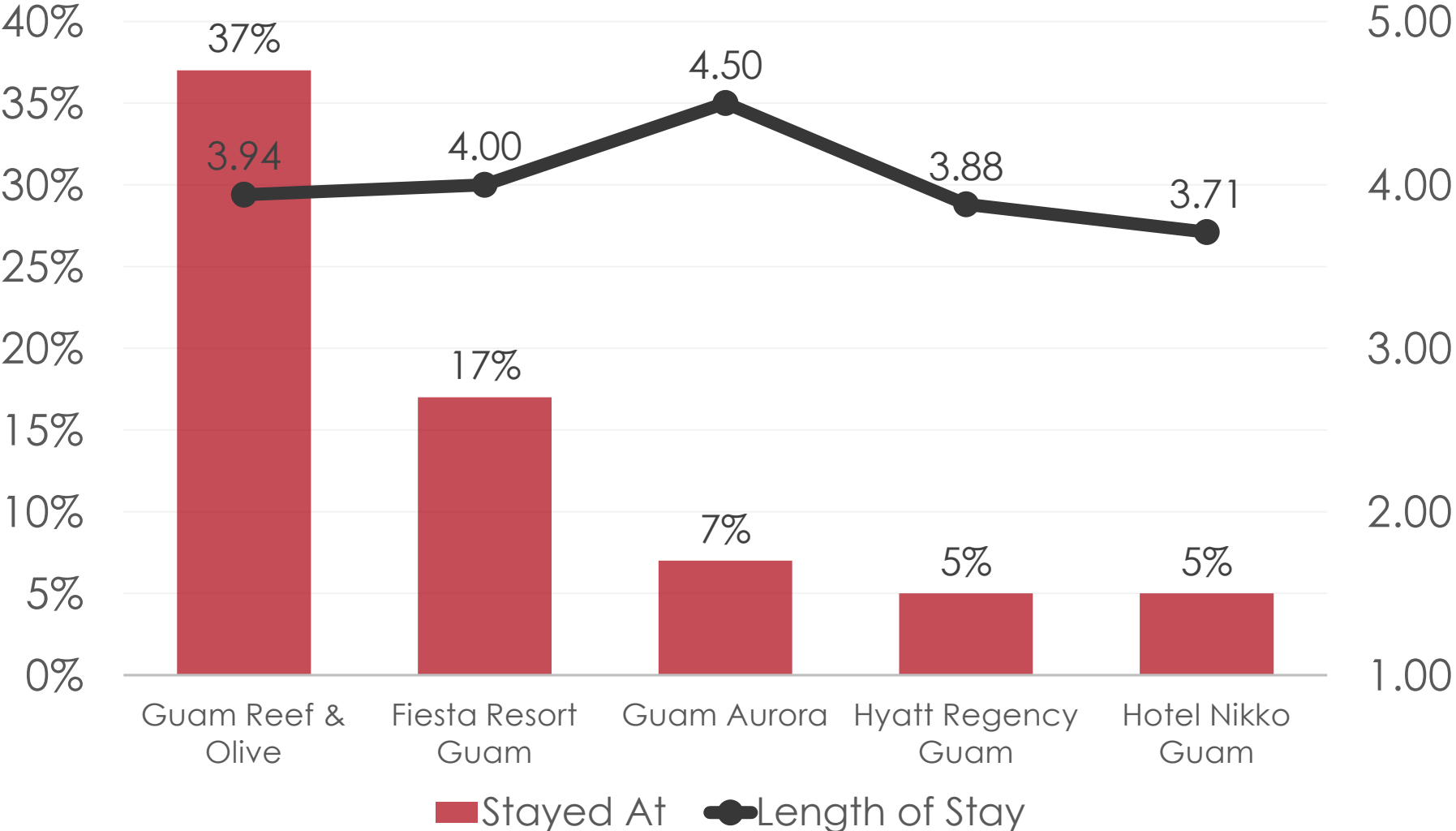
GUAM VISITORS BUREAU - EXIT SURVEY

Q7 Please describe your travel arrangements to Guam?

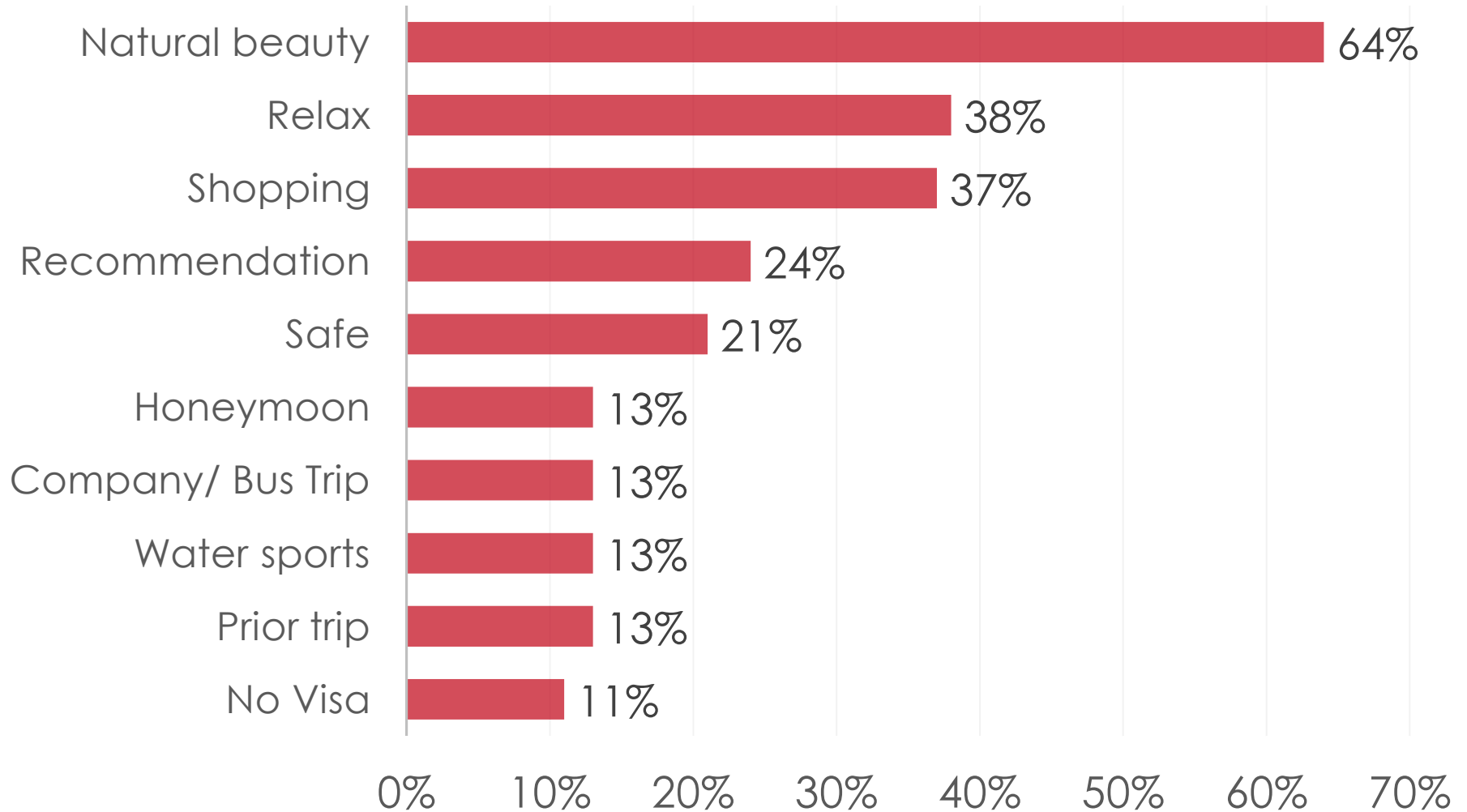
		TOTAL	MICE	SPORTS/ ADVENTURE	WEDDING	HONEYMOON
		-	-	-	-	-
Q7	Free-time package tour	38%		41%	50%	47%
	Full package tour	33%	100%	35%	50%	37%
	Individually arranged travel (FIT)	13%		13%		11%
	Group tour	8%		2%		5%
	Company paid travel	7%		8%		
	Other	1%				
	Total	149	3	85	10	19

Prepared by QMark Research

Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q5A Please select the top 3 reasons that motivated you to travel to Guam?

		TOTAL	MICE	SPORTS/ ADVENTURE	WEDDING	HONEYMOON
		-	-	-	-	-
Q5A	Natural beauty	64%	33%	69%	50%	70%
	Relax	38%	33%	44%	20%	40%
	Shopping	37%		39%	40%	30%
	Recomm- friend/family/trvl agnt	24%		22%	20%	20%
	Safe	21%		18%	20%	30%
	Honeymoon	13%		18%		100%
	Company/ Business Trip	13%		9%		
	Water sports	13%		22%	10%	10%
	Previous trip	13%		7%		
	No Visa requirement	11%		8%	10%	10%
	Scuba	11%		19%	10%	20%
	Pleasure	9%		11%		5%
	Other	7%		7%		
	Price	7%		4%		10%
	Married/ Attn wedding	7%		6%	100%	
	Short travel time	5%		4%		
	Career Cert/ Testing	2%		4%		
	Organized sports	1%		2%		
	Convention/ Trade/ Conference	1%	67%			
	Company Sponsored	1%	33%			
	Visit friends/ Relatives	1%				
	Total	149	3	85	10	20

Prepared by QMark Research

SECTION 3

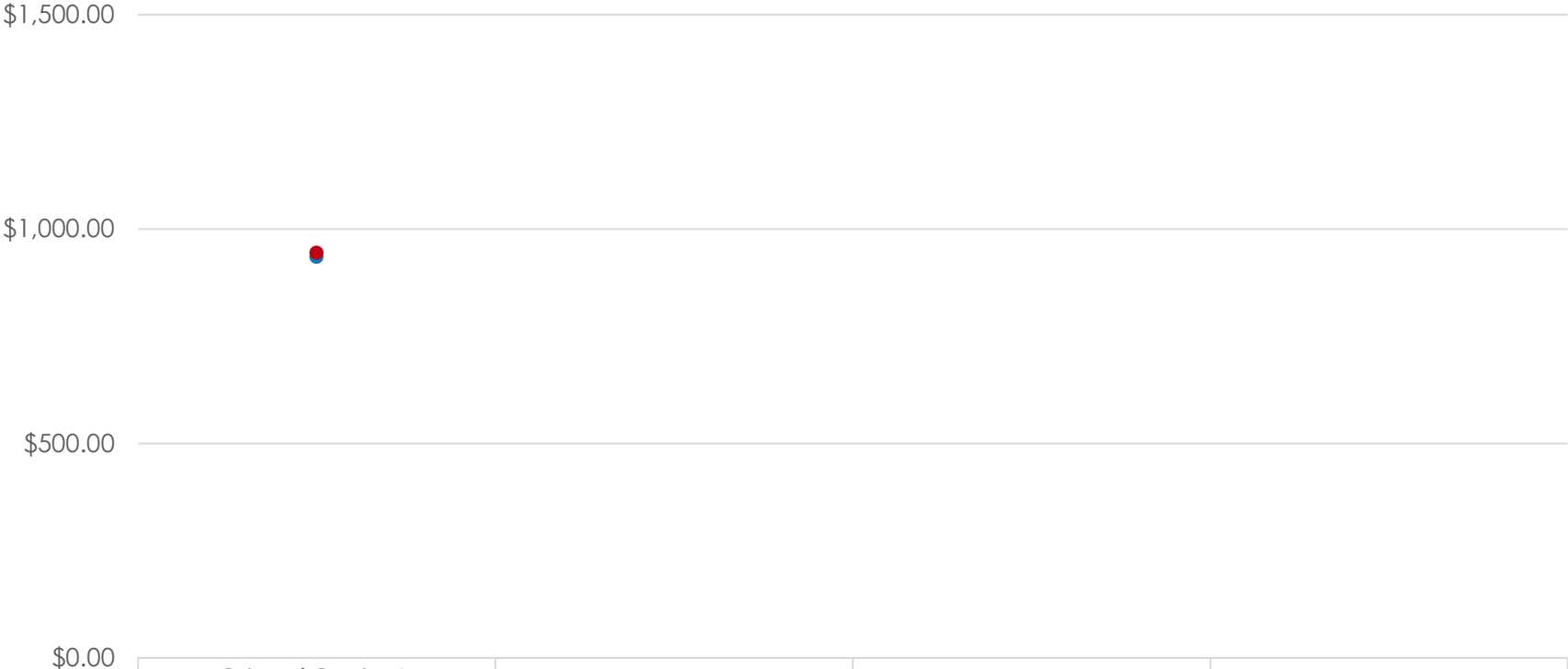
EXPENDITURES

Prepaid Expenditures

EXCHANGE RATE NT31.73=\$1

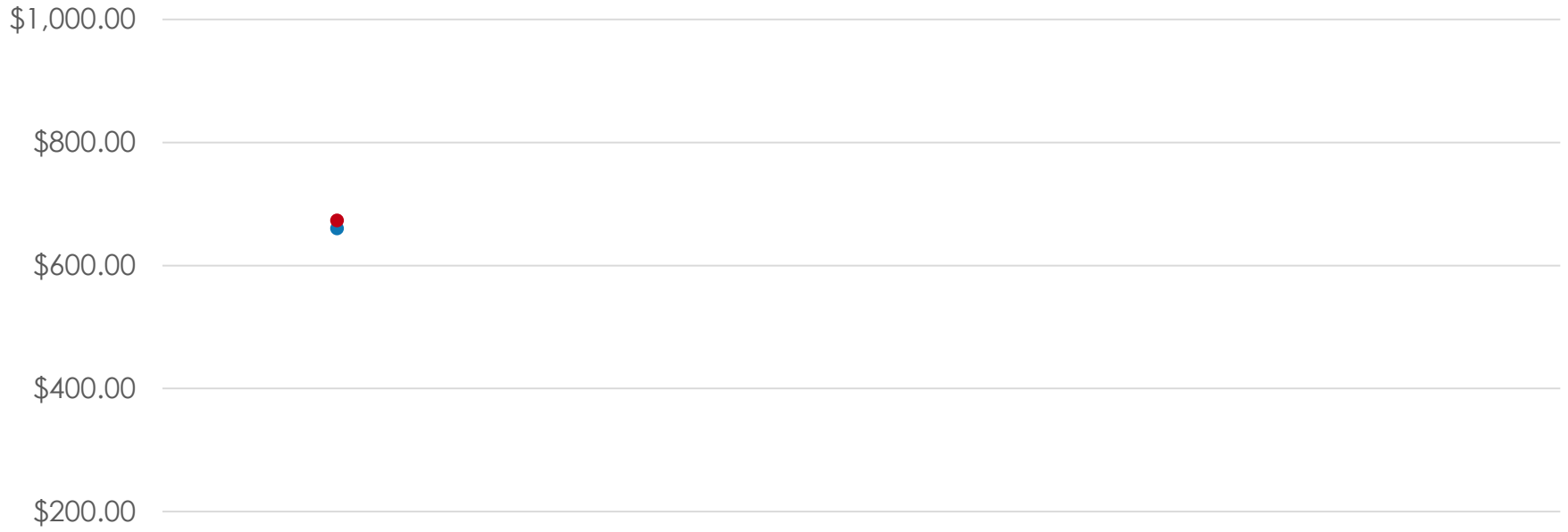
- \$935.76 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$660.28 = overall mean average per person prepaid expenditures

Prepaid Entire Travel Party – FY2017 Tracking



	Qtr1 (Oct16- Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
● MEAN	\$935.76			
● MEDIAN	\$945.00			

Prepaid Per Person– FY2017 Tracking



	Qtr1 (Oct16- Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
● MEAN	\$660.28			
● MEDIAN	\$673.00			

Prepaid Per Person– Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q10A How much did you pay in Korea before coming to Guam for the tour package, your airfare, lodging meals, and transportation?

PER PERSON

		TOTAL	MICE	SPORTS/ ADVENTURE	WEDDING	HONEYMOON
		-	-	-	-	-
TWD\$	Mean	\$660.28	\$262.63	\$765.11	\$666.56	\$851.64
	Median	\$673	\$0	\$930	\$575	\$945

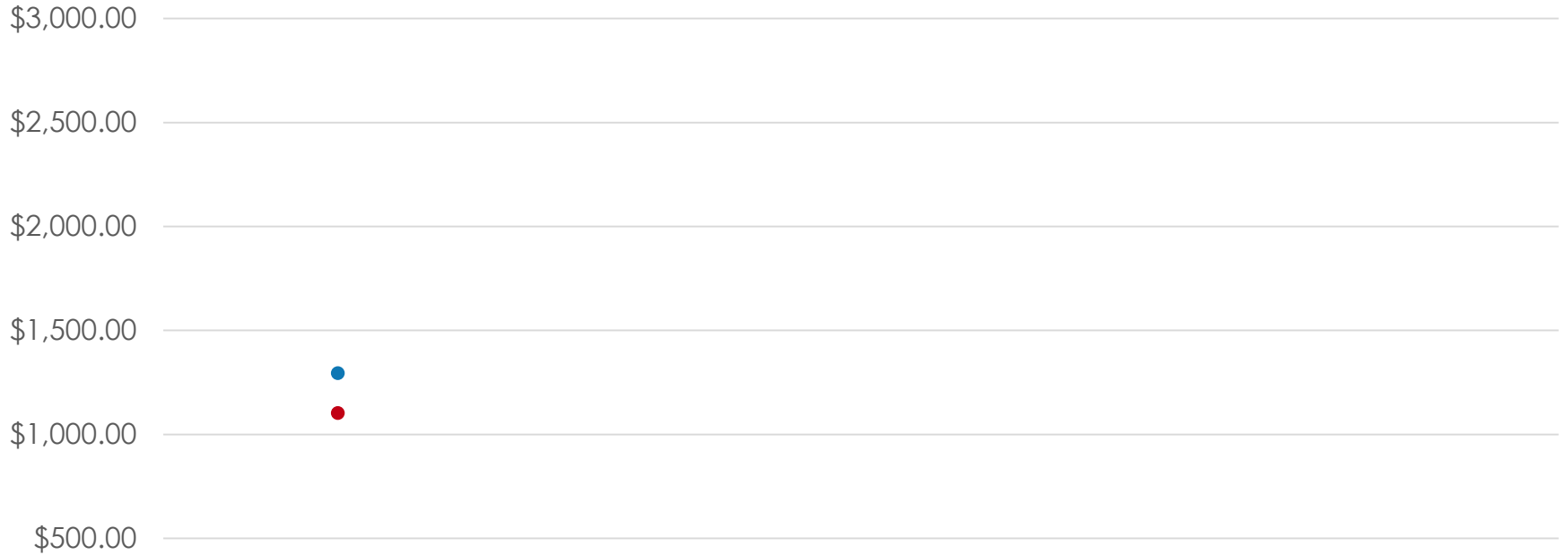
Prepared by QMark Research

Prepaid Expenses by Category – MEAN Entire Travel Party



Prepaid– FY2017 Tracking

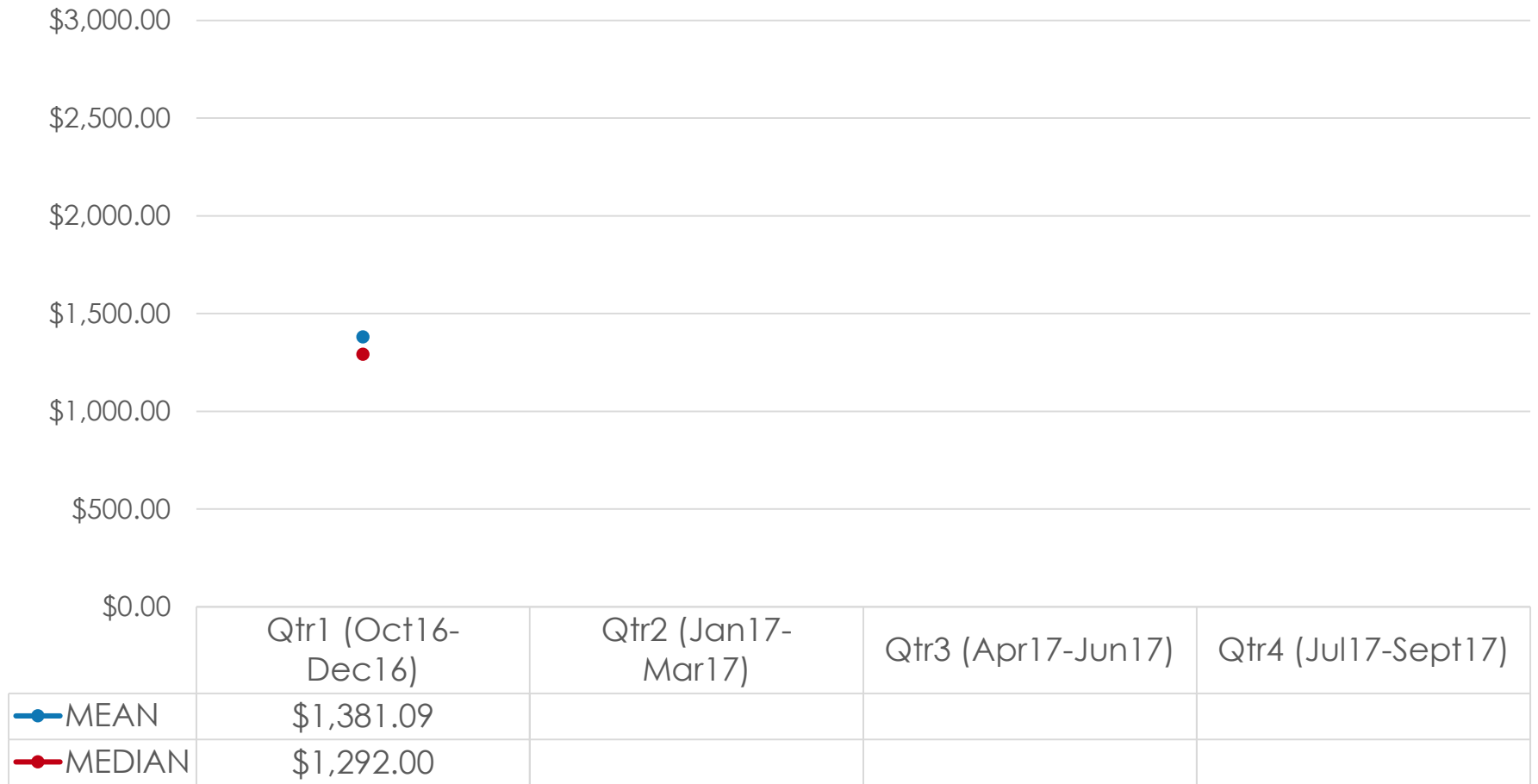
Airfare & Accommodation Packages



	Qtr1 (Oct16- Dec16)	Qtr2 (Jan17- Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
● MEAN	\$1,295.71			
● MEDIAN	\$1,103.00			

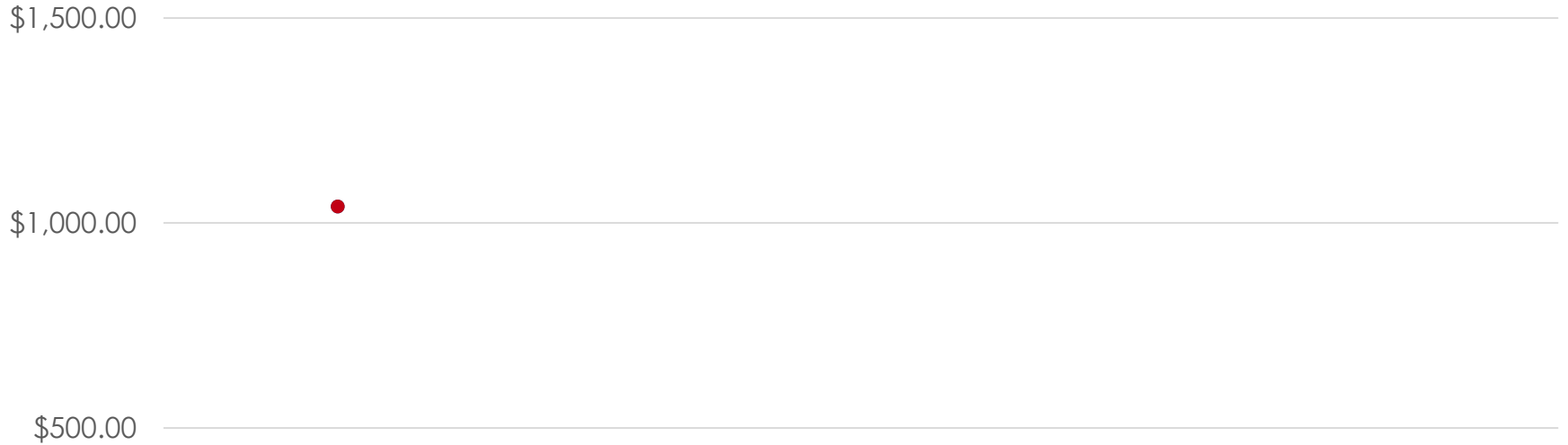
Prepaid– FY2017 Tracking

Airfare & Accommodation W/ Meal Packages



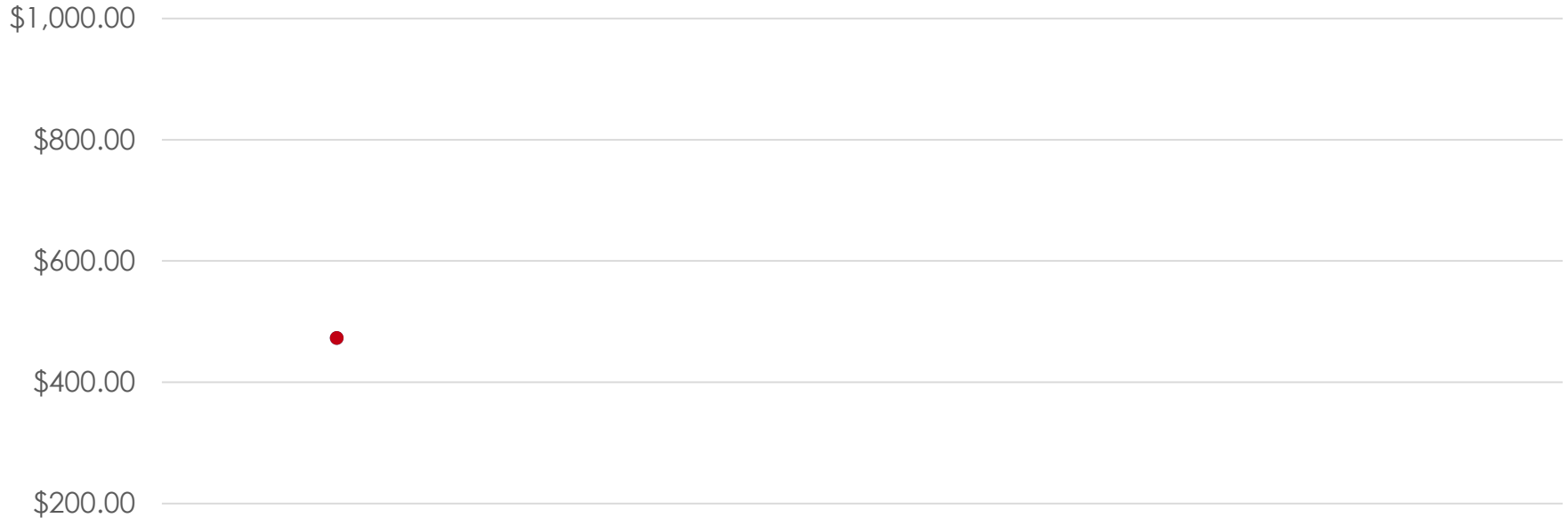
Prepaid– FY2017 Tracking

Airfare Only



	Qtr1 (Oct16- Dec16)	Qtr2 (Jan17- Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	\$1,040.03			
MEDIAN	\$1,040.00			

Prepaid– FY2017 Tracking Accommodations Only



	Qtr1 (Oct16- Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
● MEAN	\$472.74			
● MEDIAN	\$473.00			

Prepaid– FY2017 Tracking

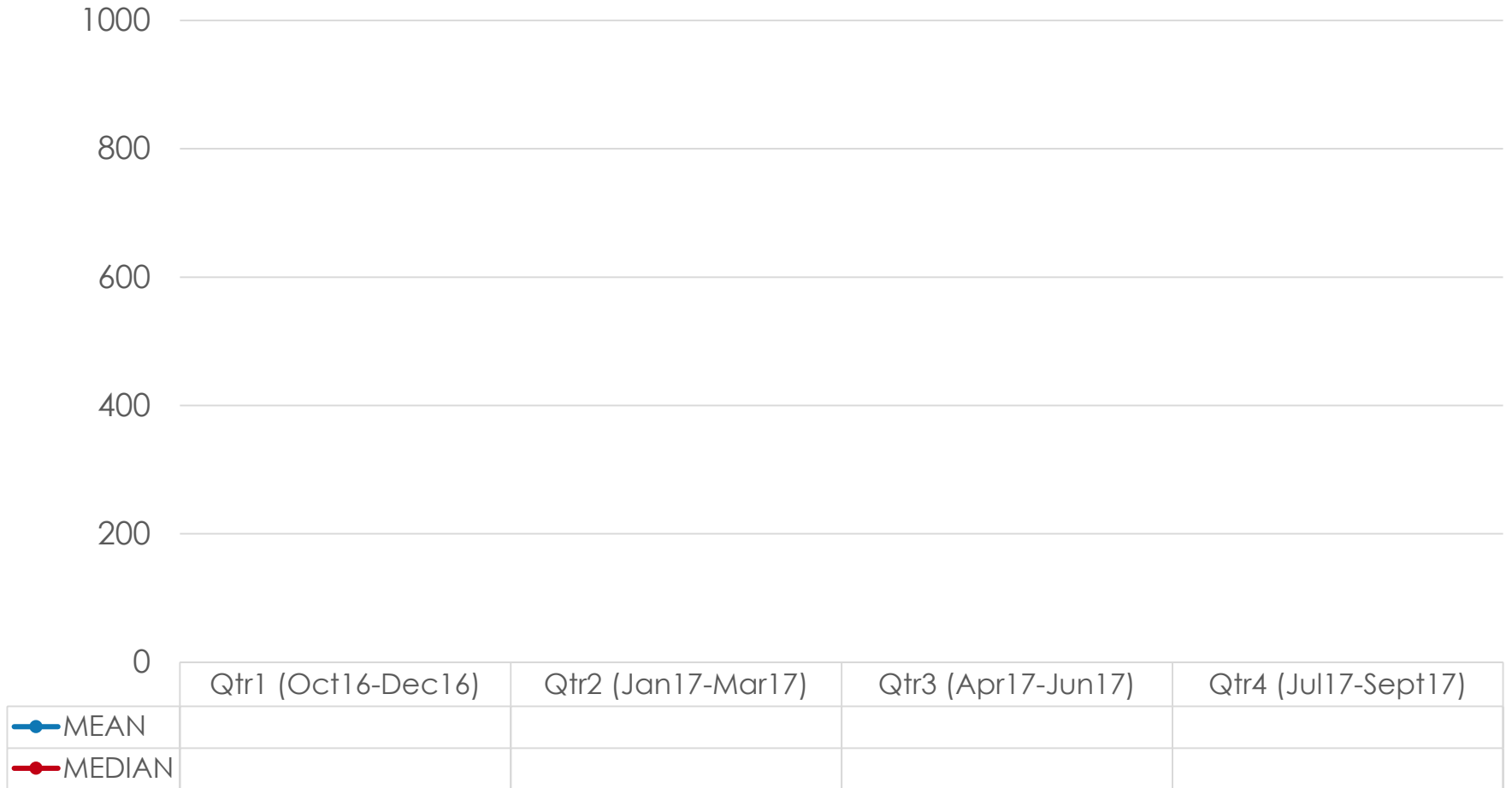
Accommodations w/ Meal Only (N/A)



	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN				
MEDIAN				

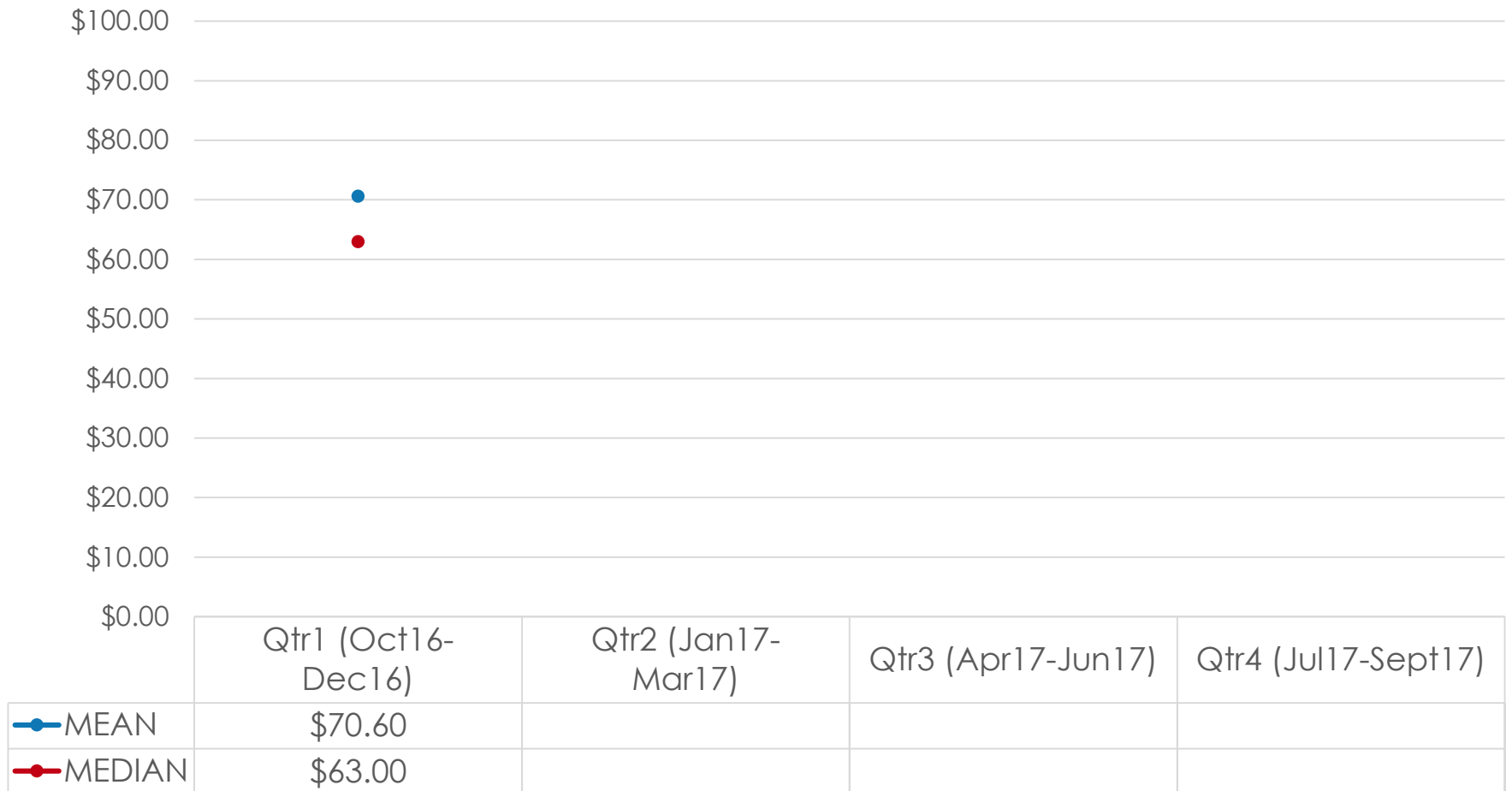
Prepaid- FY2017 Tracking

Food & Beverage in Hotel (N/A)



Prepaid- FY2017 Tracking

Ground Transportation - Taiwan



Prepaid- FY2017 Tracking

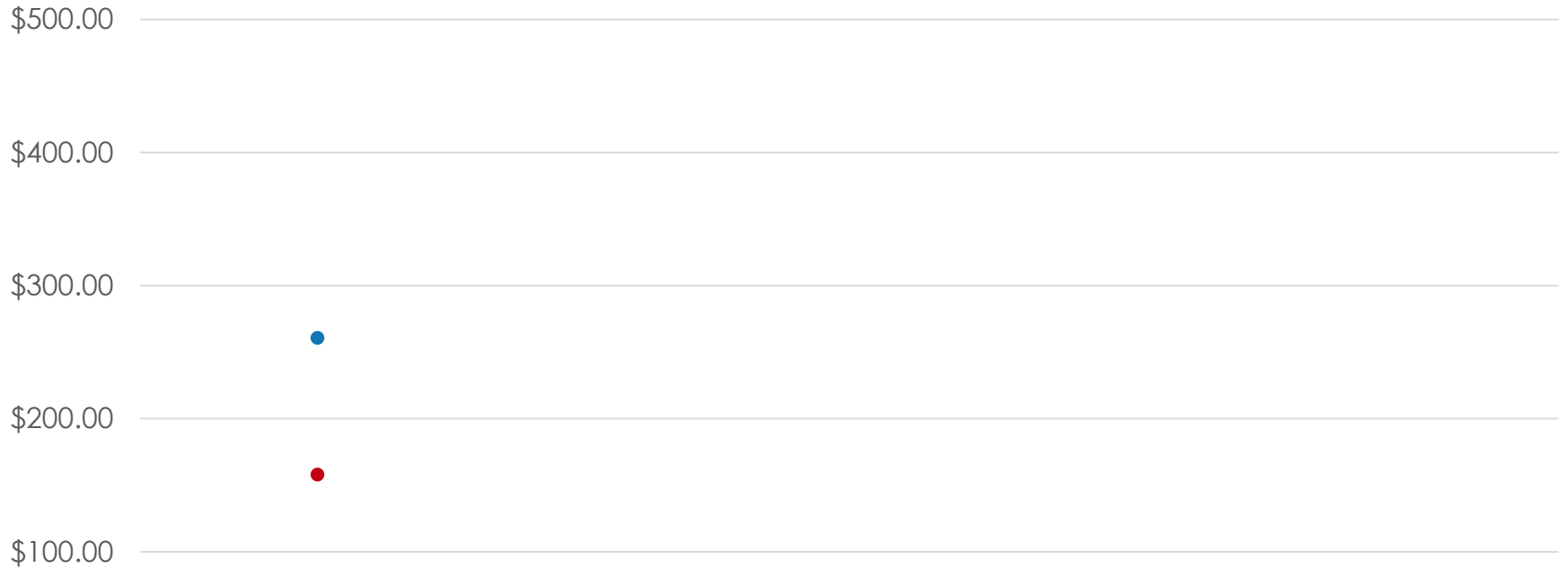
Ground Transportation - Guam



	Qtr1 (Oct16- Dec16)	Qtr2 (Jan17- Mar17)	Qtr3 (Apr17- Jun17)	Qtr4 (Jul17- Sept17)
MEAN	\$75.64			
MEDIAN	\$76.00			

Prepaid– FY2017 Tracking

Optional tours/ Activities

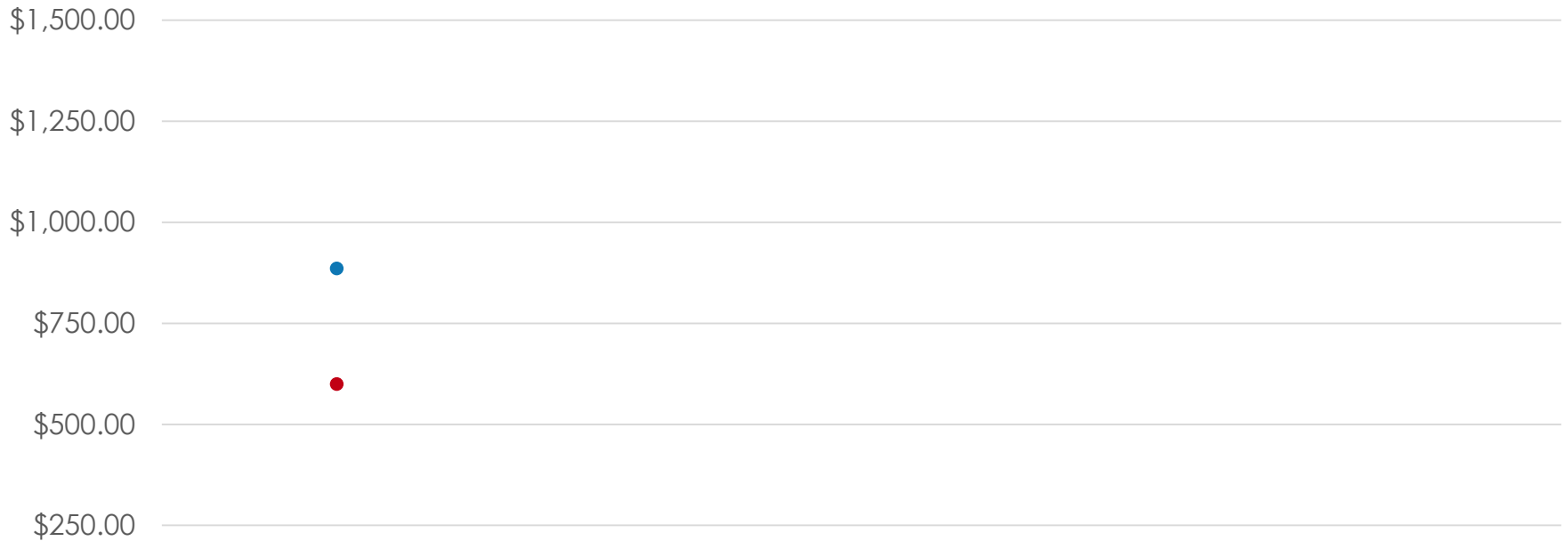


	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
● MEAN	\$260.77			
● MEDIAN	\$158.00			

On-Island Expenditures

- \$885.67 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$702.97 = overall mean average per person prepaid expenditures

On-Island Entire Travel Party – FY2017 Tracking



	Qtr1 (Oct16- Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
● MEAN	\$885.67			
● MEDIAN	\$600.00			

On-Island Per Person – FY2017 Tracking



	Qtr1 (Oct16- Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
● MEAN	\$702.97			
● MEDIAN	\$400.00			

On-Island Per Person – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

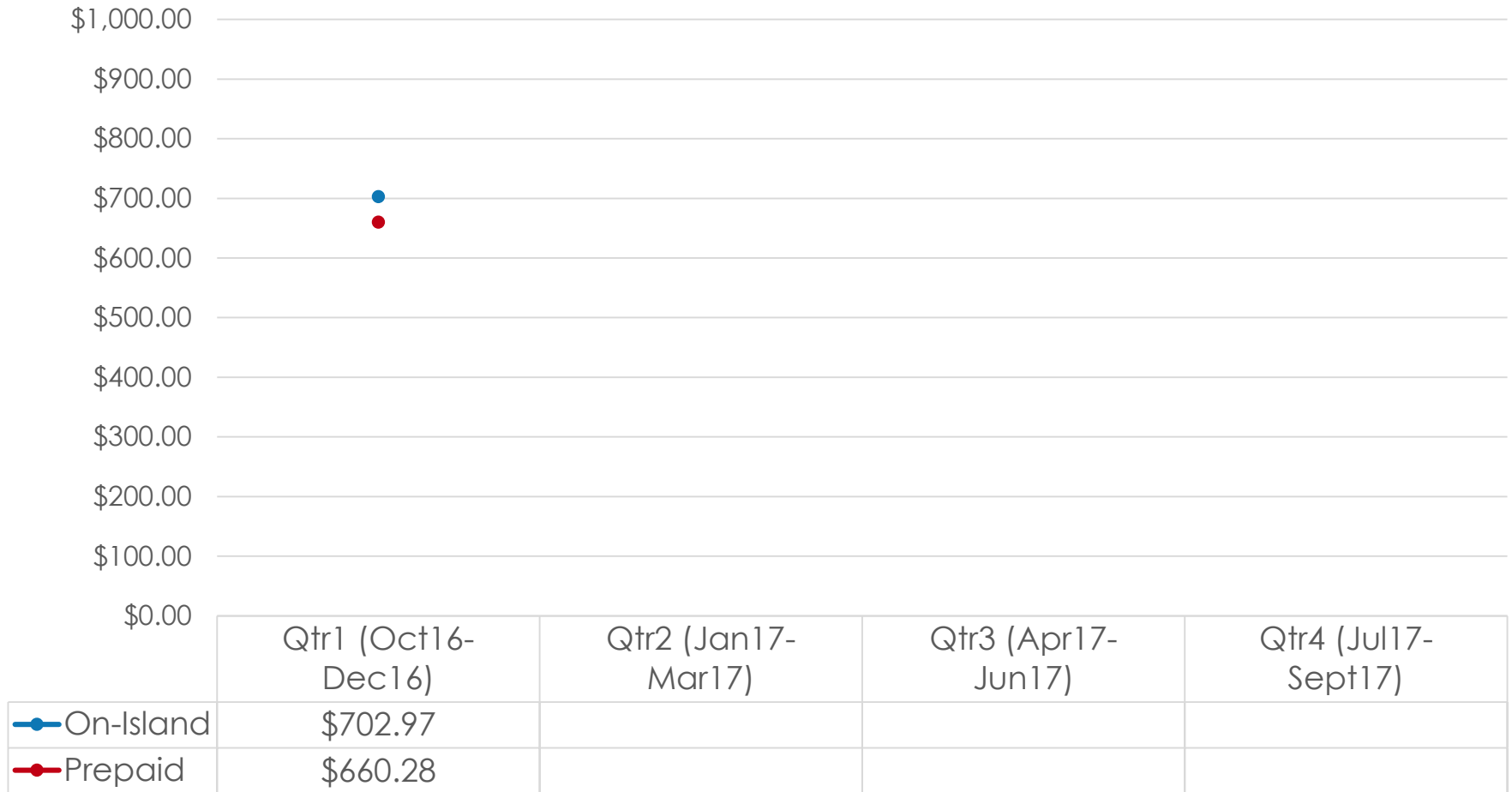
Q11A How much in total did you spend while on Guam during this trip?

PER PERSON

		TOTAL	MICE	SPORTS/ ADVENTURE	WEDDING	HONEYMOON
		-	-	-	-	-
ONISLE	Mean	\$702.97	\$833.33	\$804.57	\$836.70	\$965.13
	Median	\$400	\$1,000	\$450	\$200	\$349

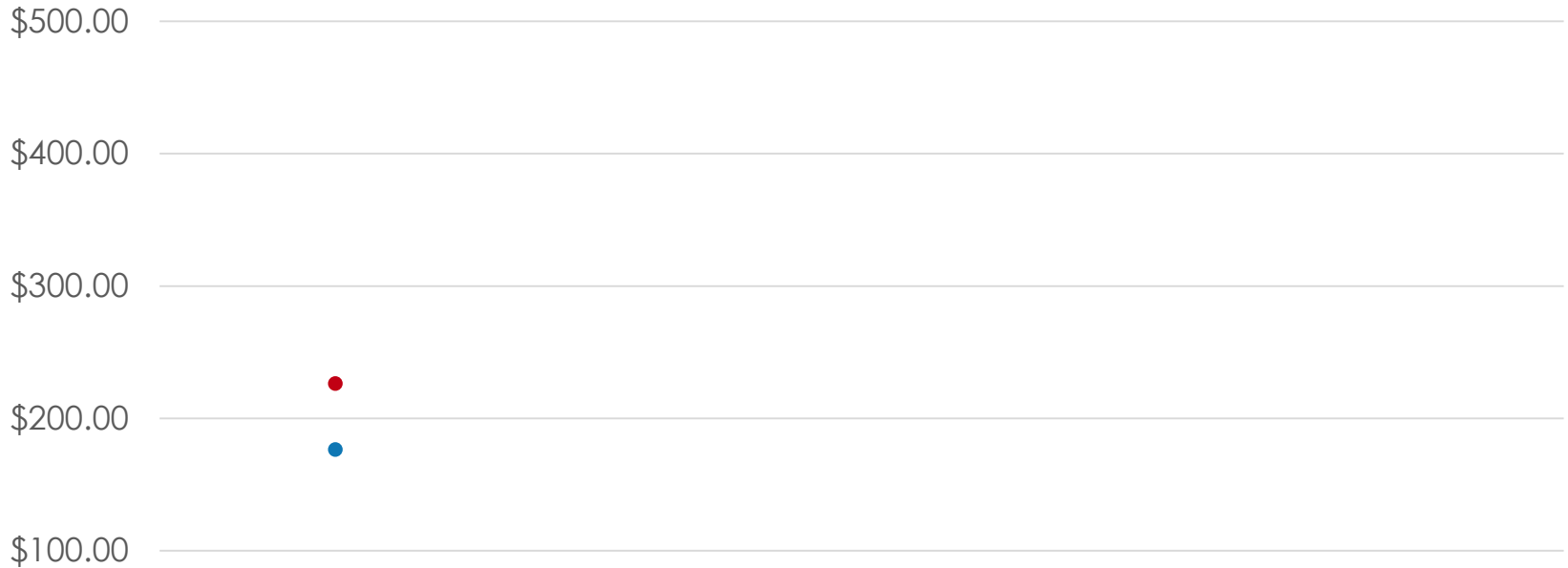
Prepared by QMark Research

Per Person MEAN expenditures – FY2017 Tracking On-Island/ Prepaid



On-Island Per Day Spending – FY2017 Tracking

MEAN



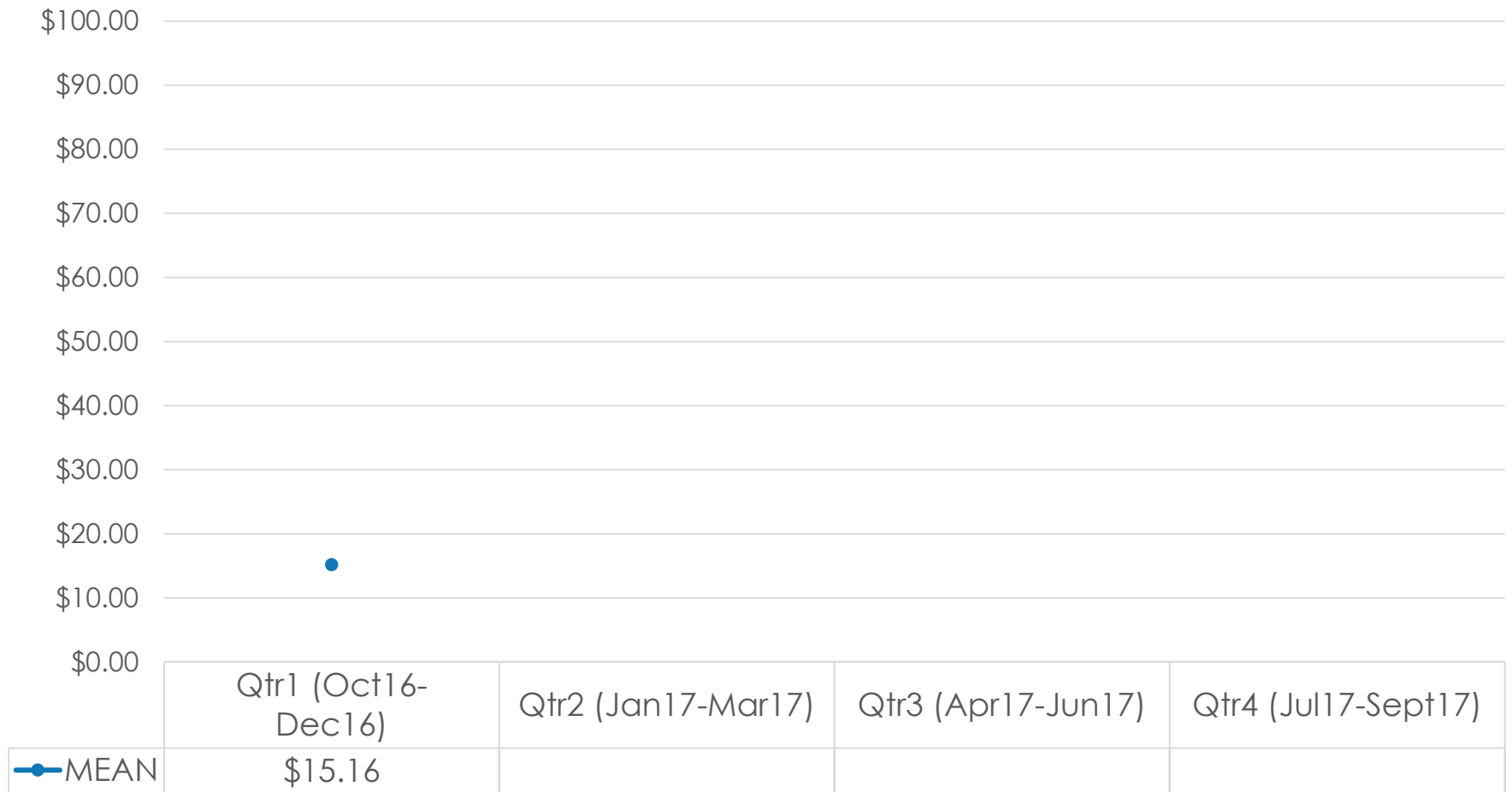
	Qtr1 (Oct16- Dec16)	Qtr2 (Jan17- Mar17)	Qtr3 (Apr17- Jun17)	Qtr4 (Jul17- Sept17)
● Per Person	\$176.54			
● Travel Party	\$226.25			

On-Island Expenses by Category – MEAN Entire Travel Party



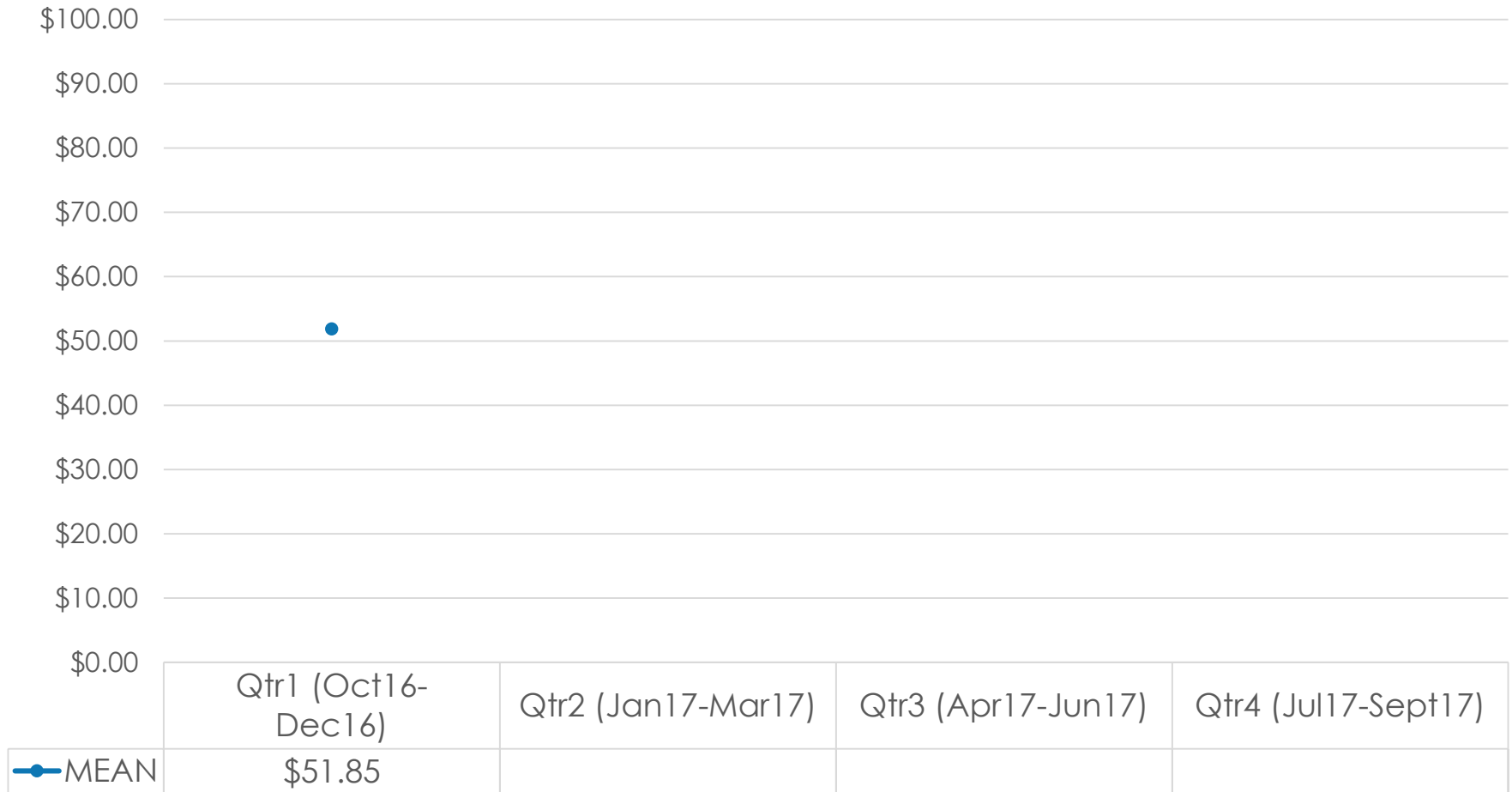
On-Island – FY2017 Tracking

Food & Beverage - Hotel



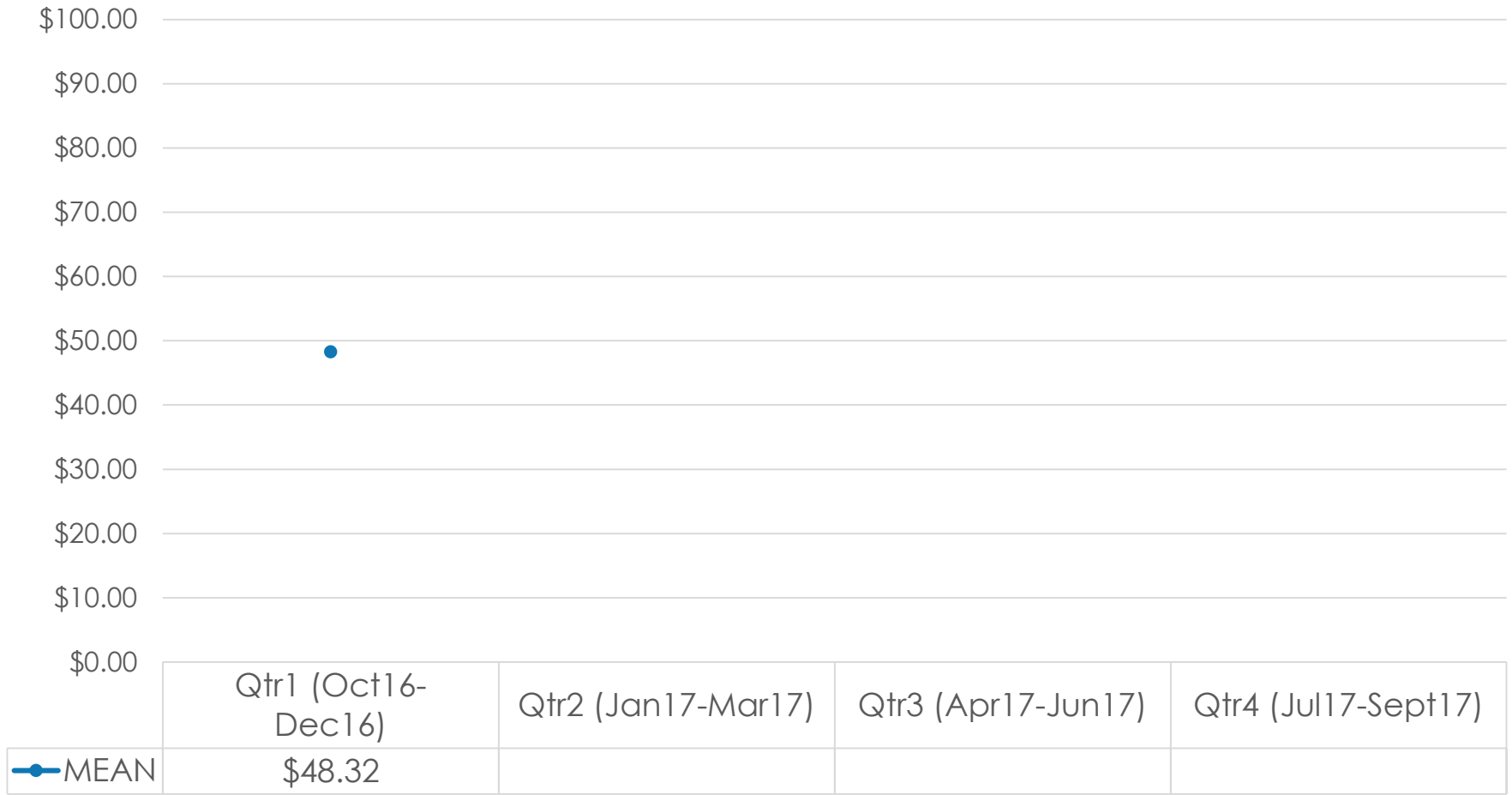
On-Island – FY2017 Tracking

Food & Beverage – Fast Food/ Convenience Store



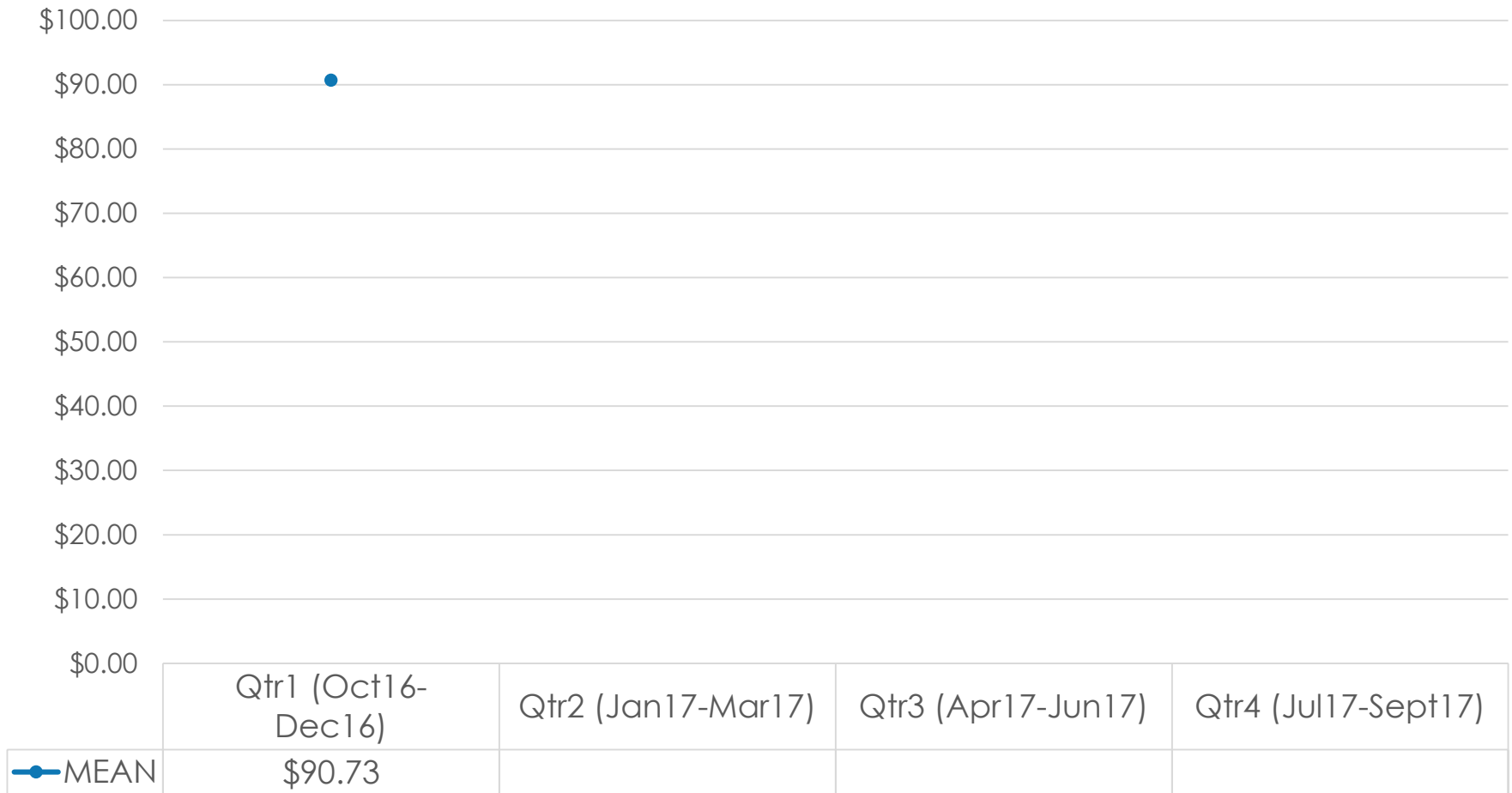
On-Island – FY2017 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



On-Island – FY2017 Tracking

Optional tour/ Activities



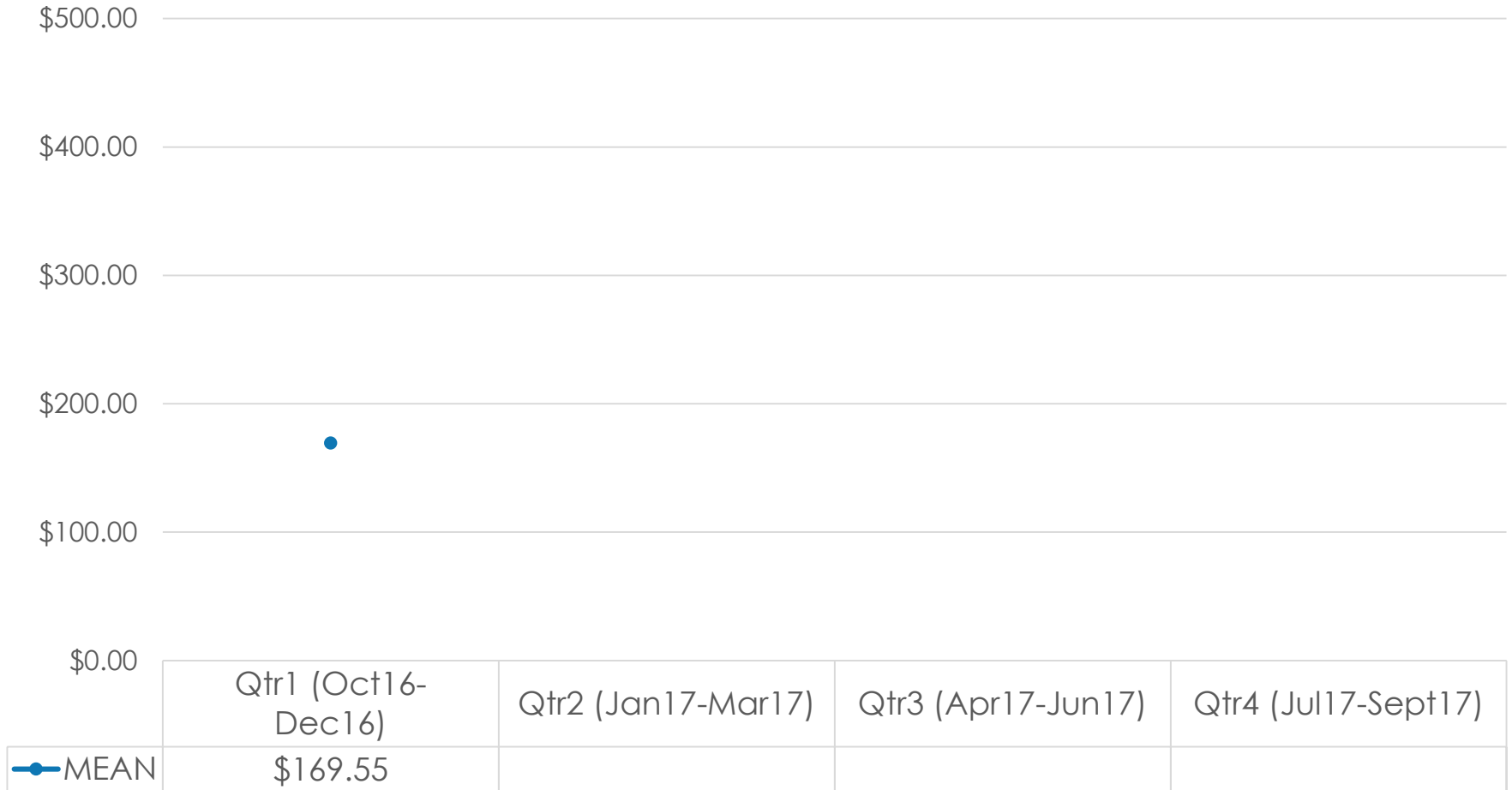
On-Island – FY2017 Tracking

Gift/ Souvenir – Self/ Companion



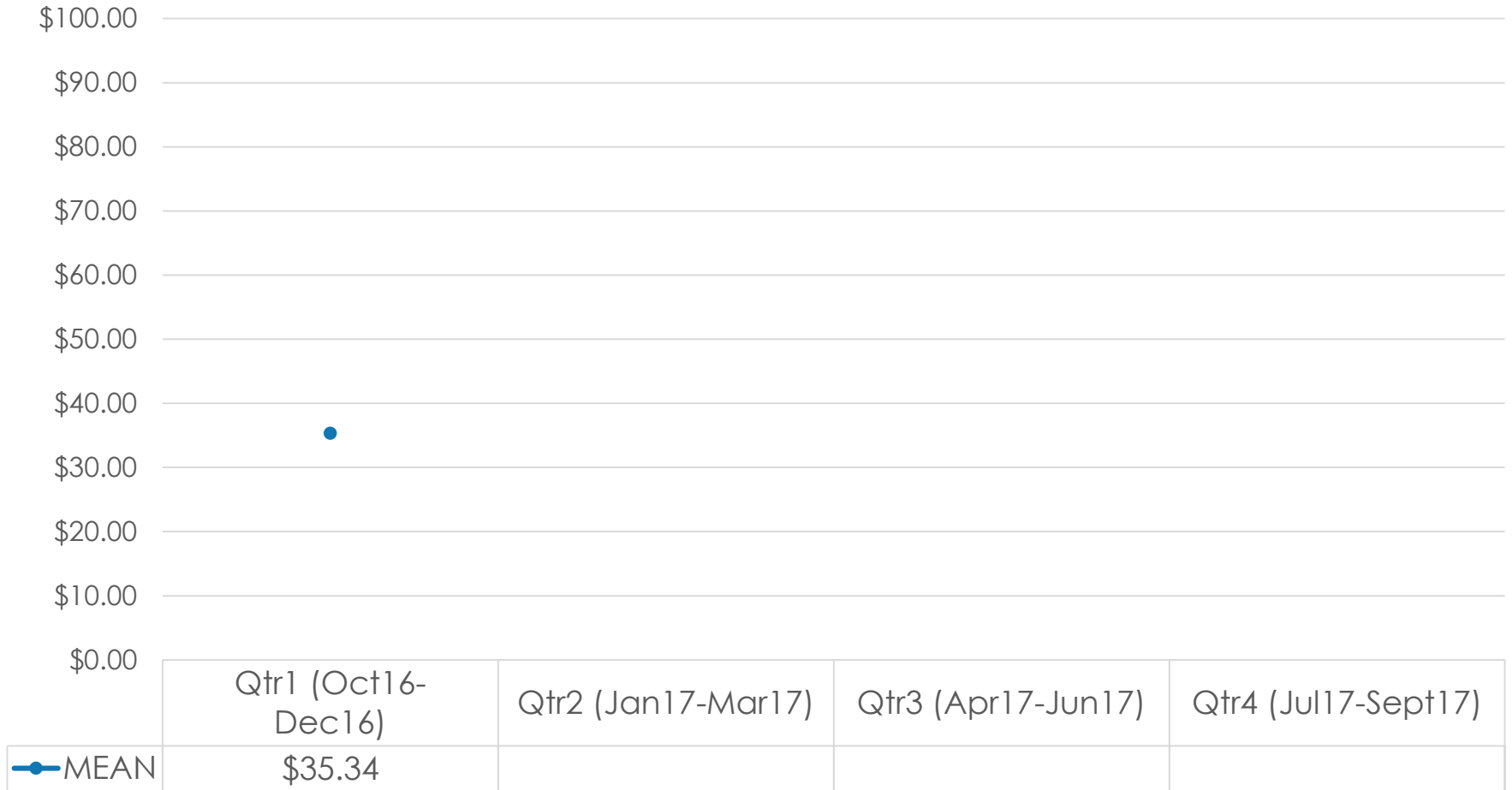
On-Island – FY2017 Tracking

Gift/ Souvenir – Friends/ Family



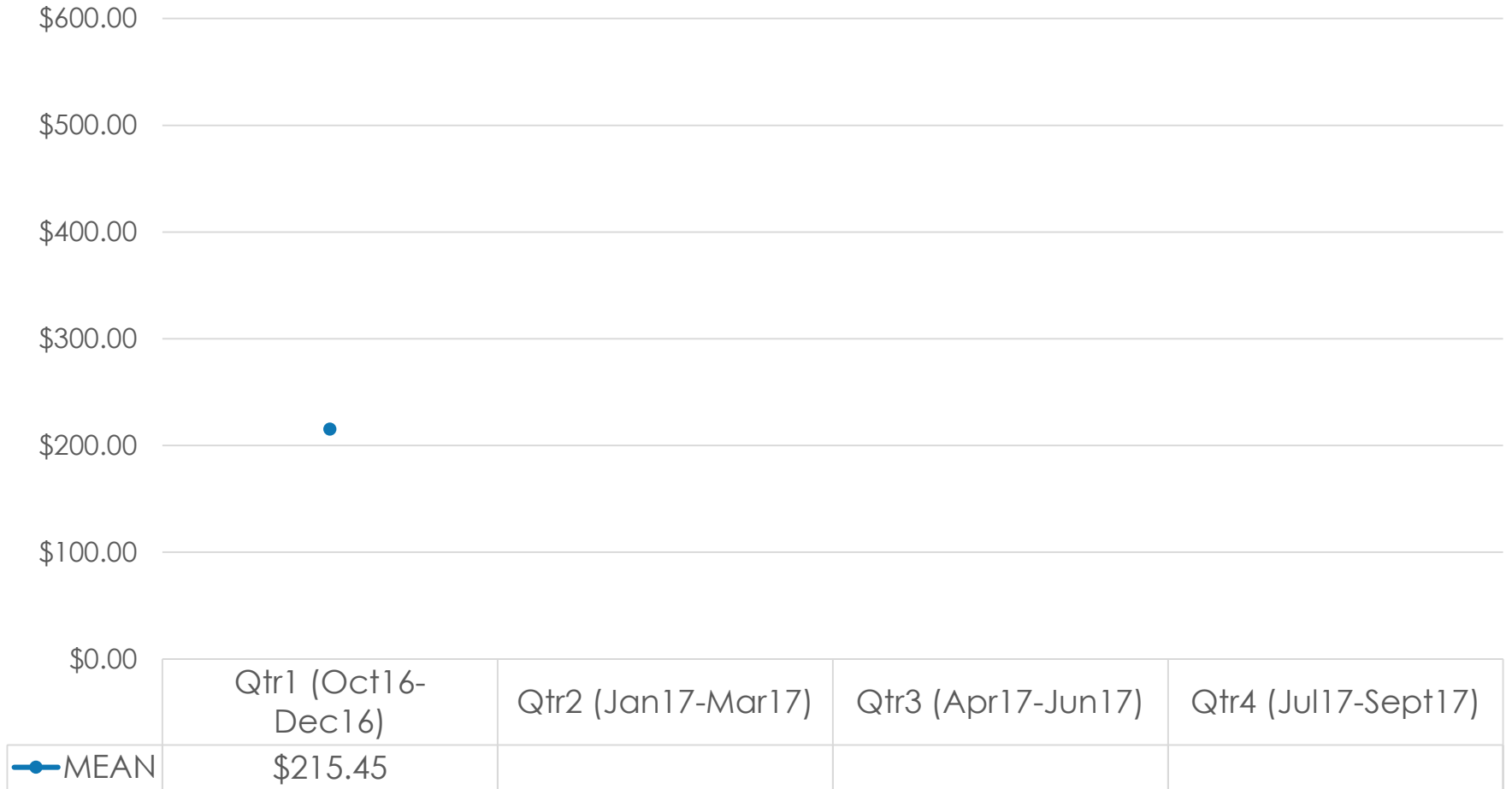
On-Island – FY2017 Tracking

Local Transportation



On-Island – FY2017 Tracking

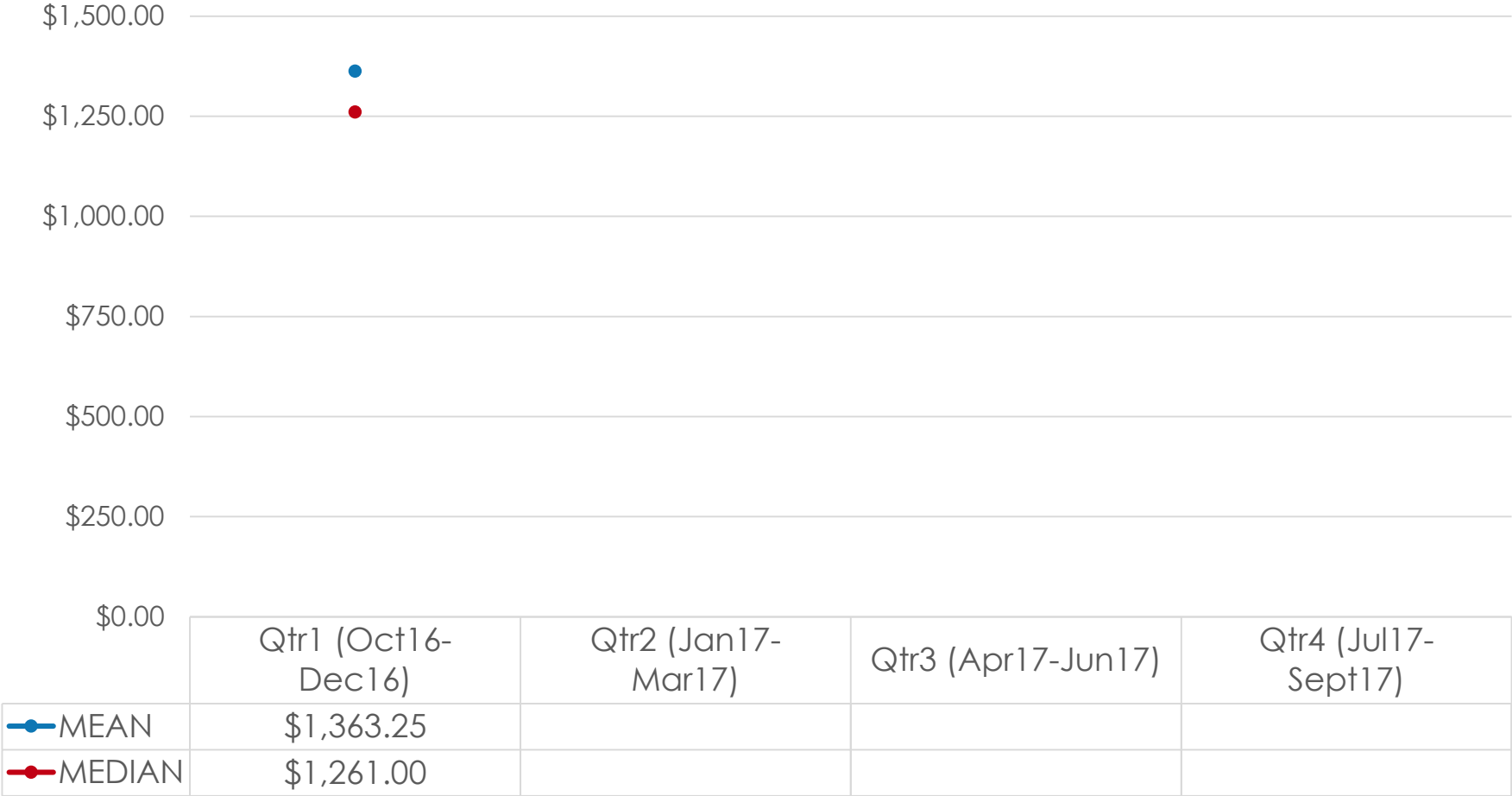
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,363.25 = overall mean average prepaid expense by respondent/ Per Person

TOTAL Per Person Expenditures – FY2017 Tracking



TOTAL Per Person Expenditures – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

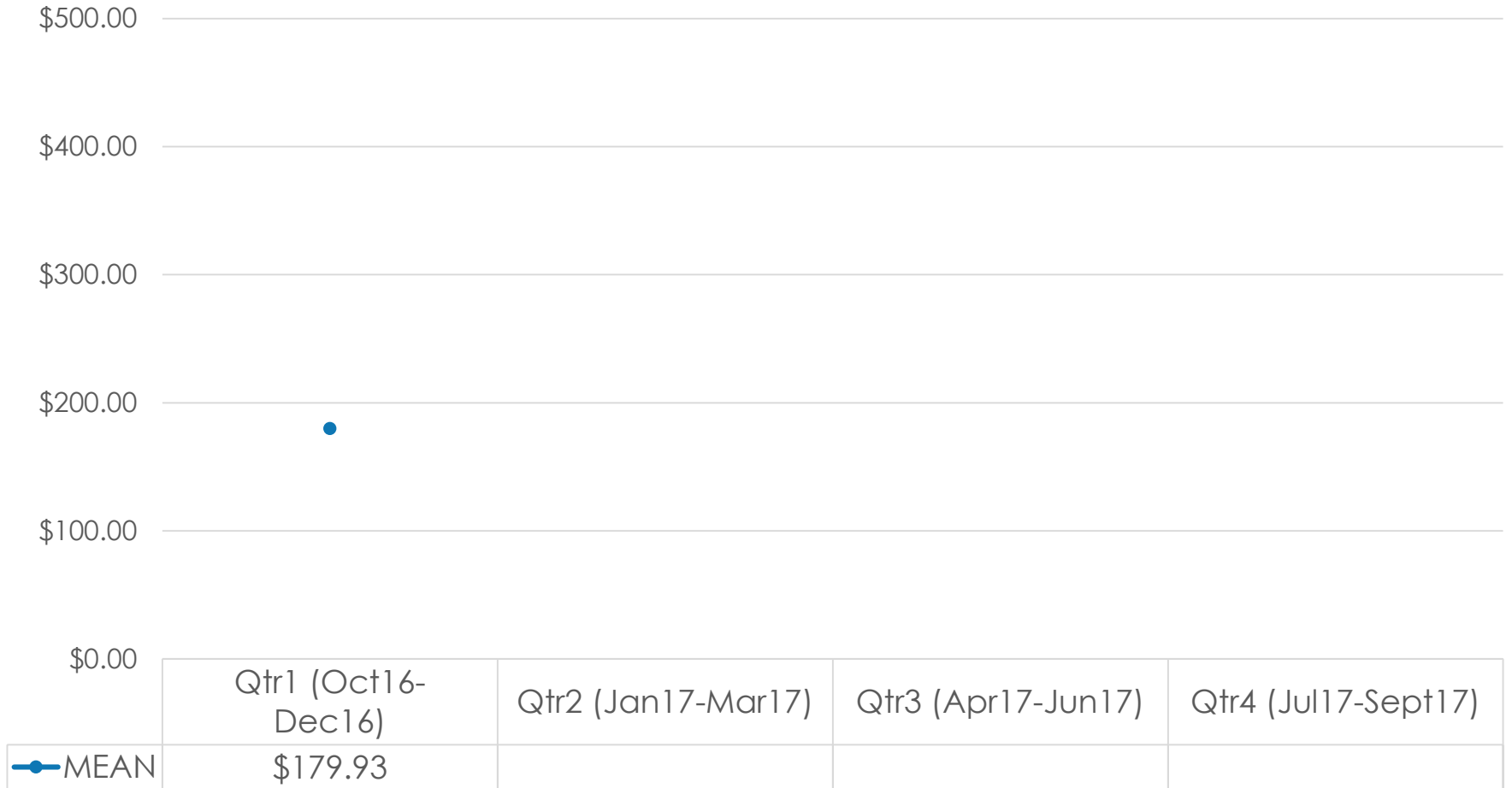
TOTAL EXPENDITURES (On-Isle / Prepaid)

PER PERSON

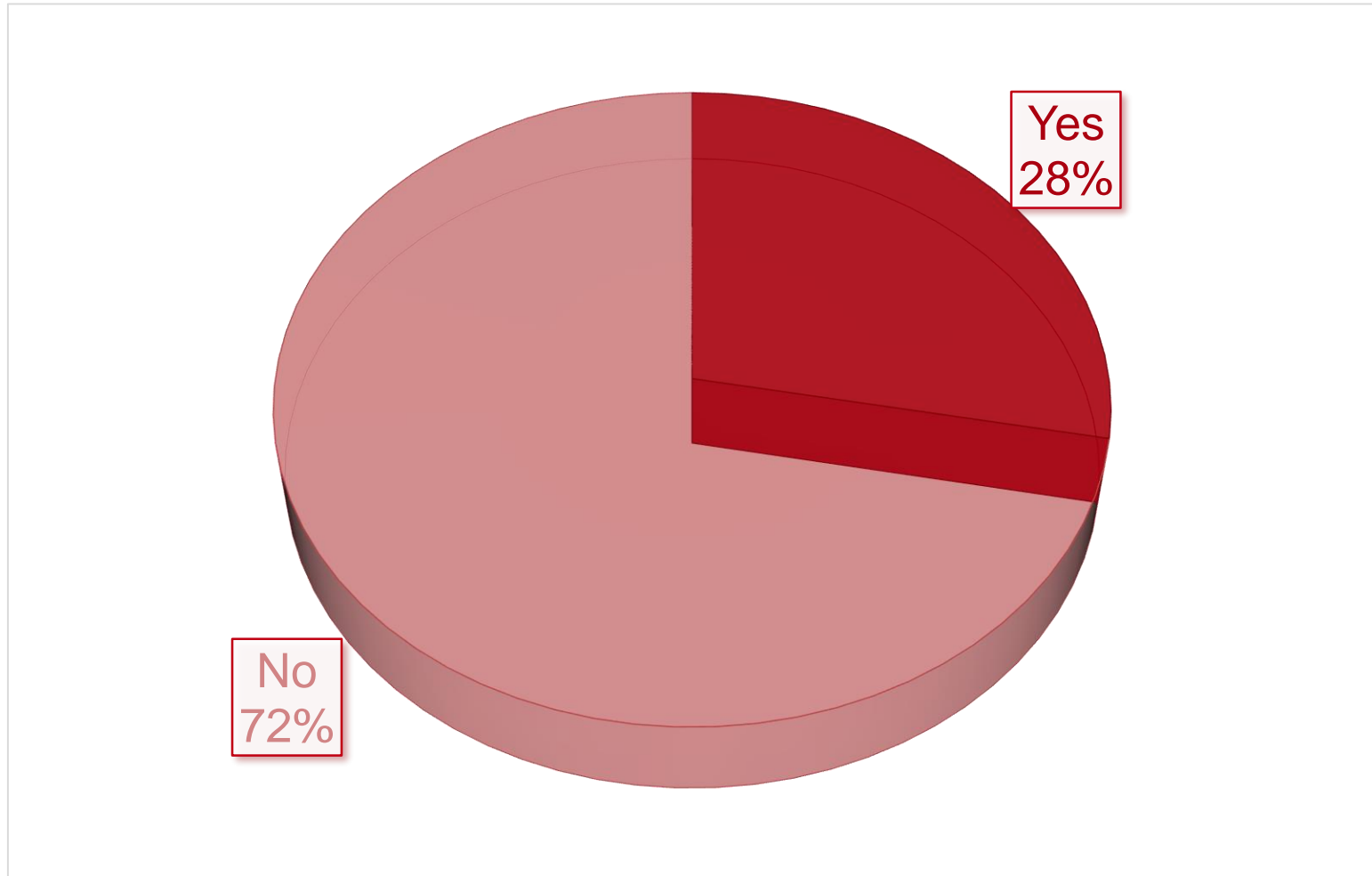
		TOTAL	MICE	SPORTS/ ADVENTURE	WEDDING	HONEYMOON
		-	-	-	-	-
TOTPP	Mean	\$1,363.25	\$1,095.97	\$1,569.67	\$1,503.26	\$1,816.76
	Median	\$1,261	\$1,000	\$1,400	\$1,080	\$1,329

Prepared by QMark Research

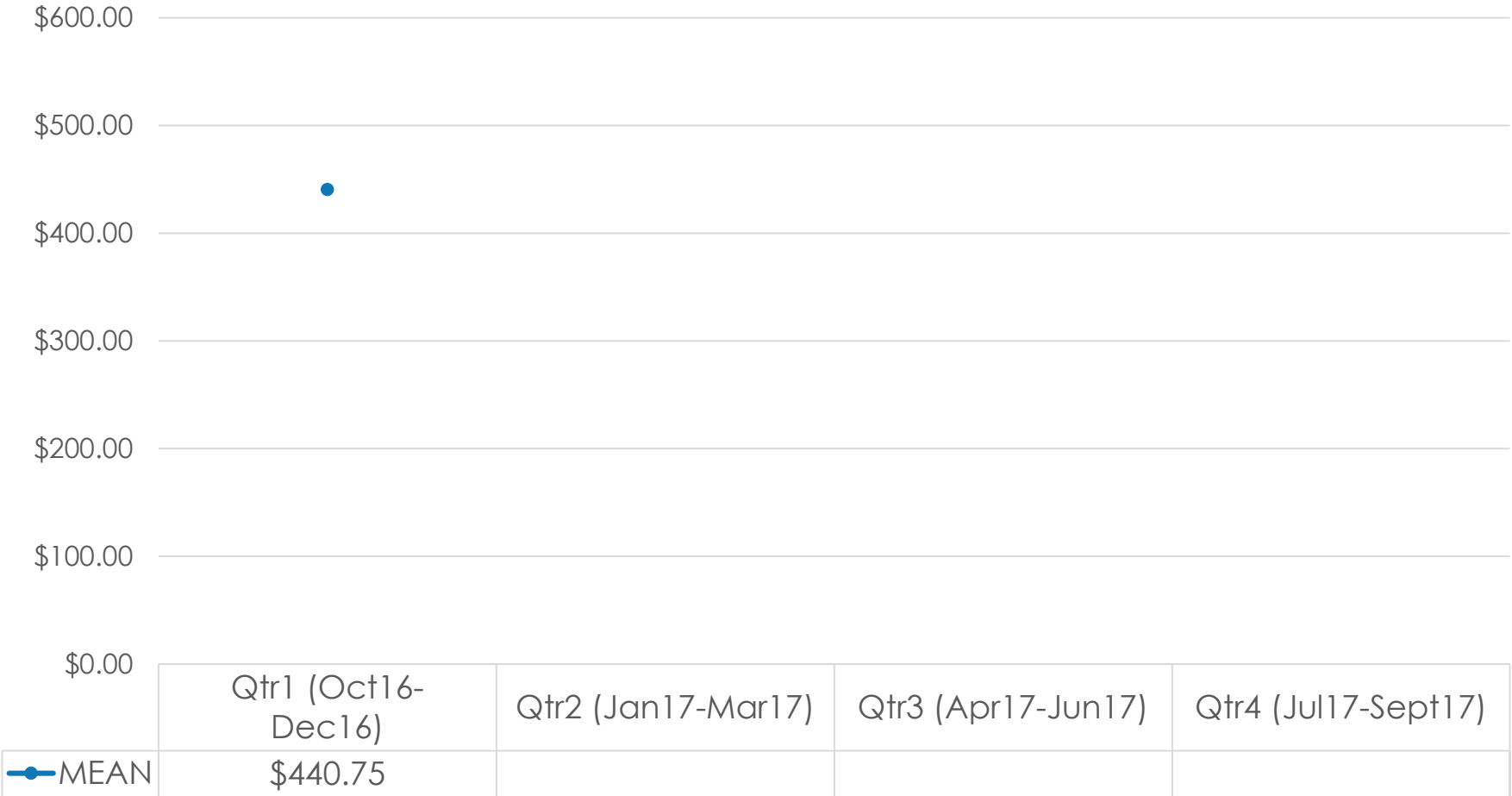
GUAM AIRPORT EXPENDITURE – FY2017 Tracking



PARTICIPATED IN SHOP GUAM e-FESTIVAL



SHOP GUAM E-FESTIVAL SPENDING – FY2017 Tracking

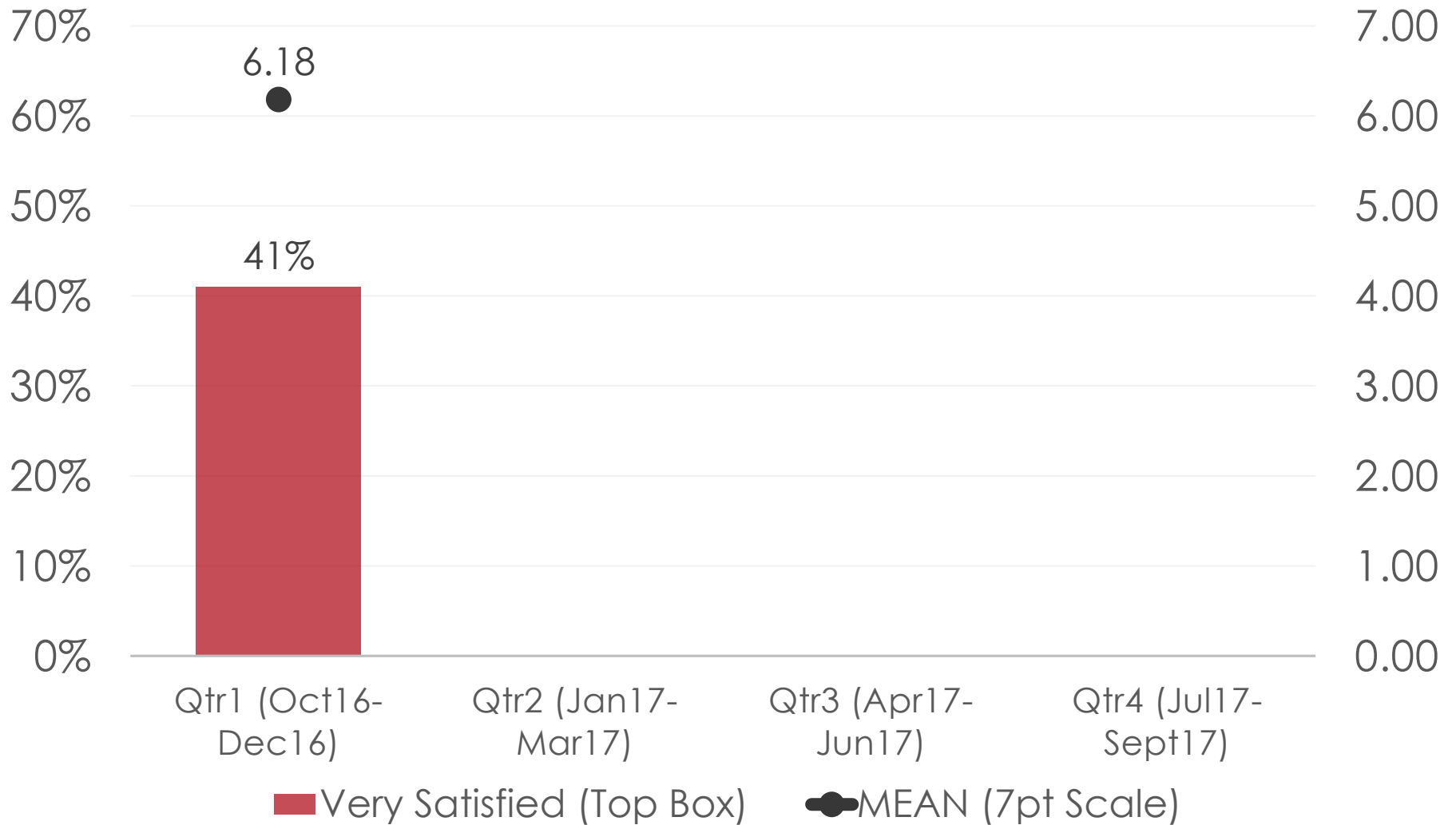


SECTION 4

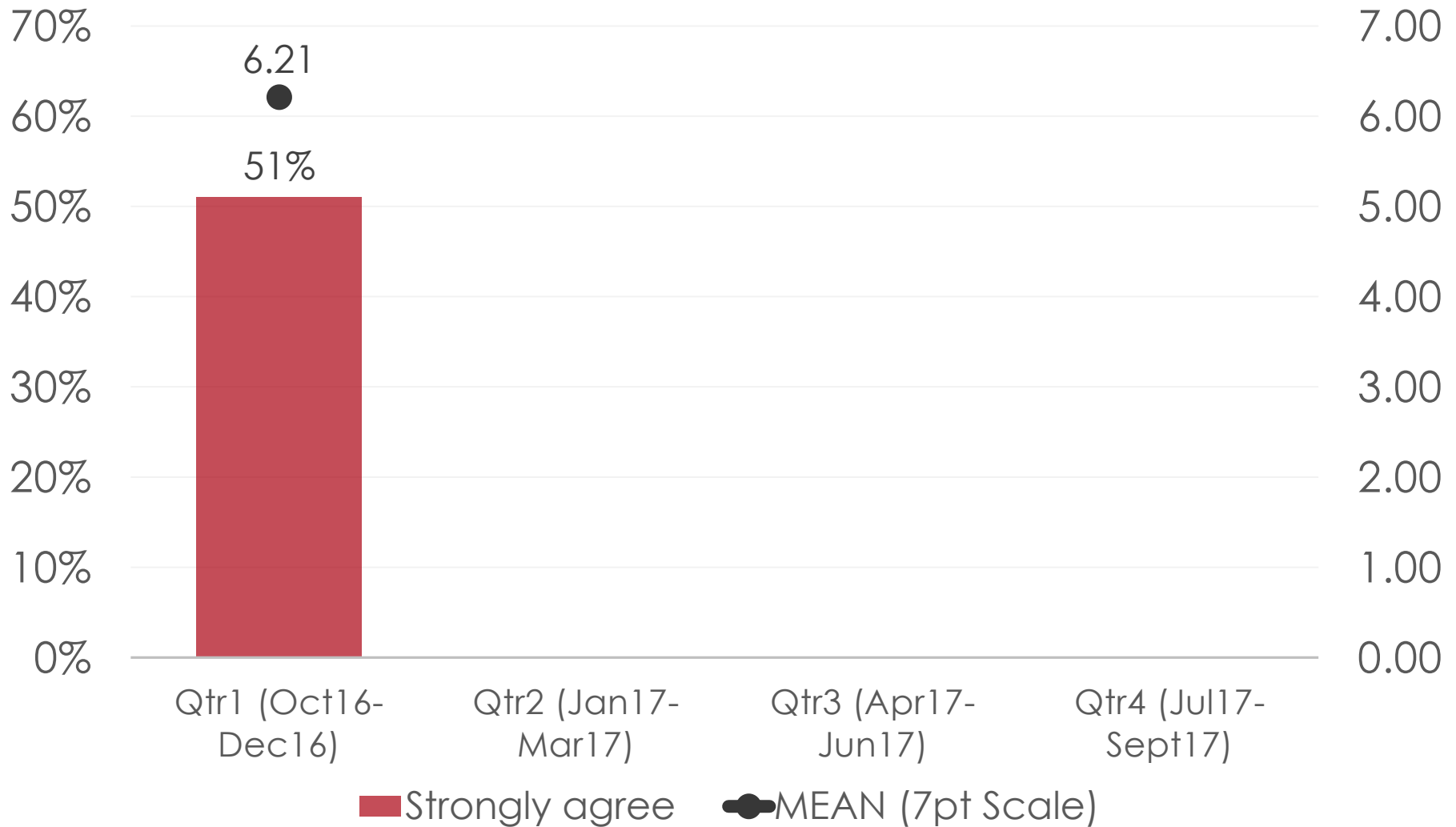
VISITOR SATISFACTION

BEHAVIOR

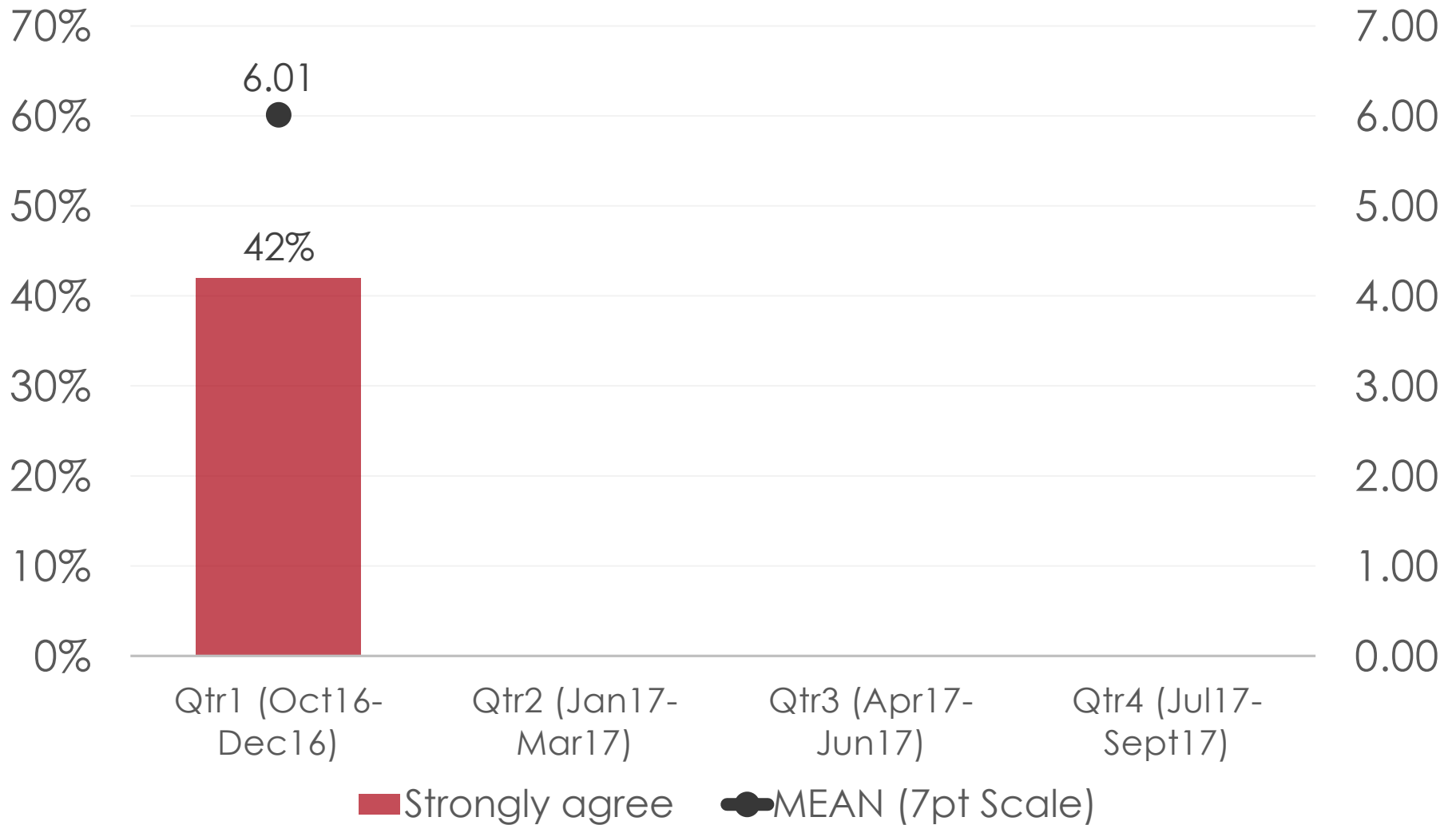
OVERALL SATISFACTION



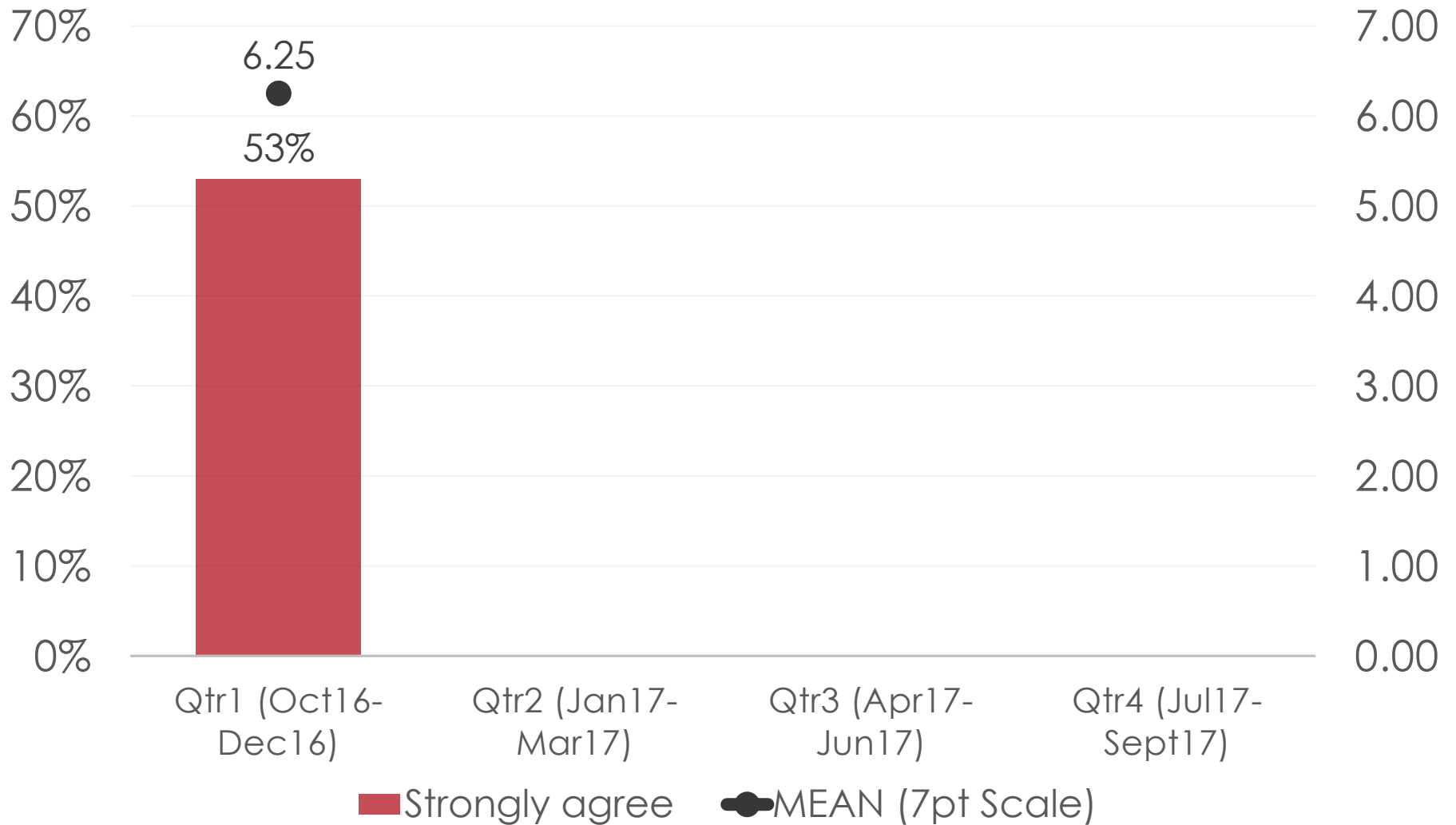
Guam was better than expected



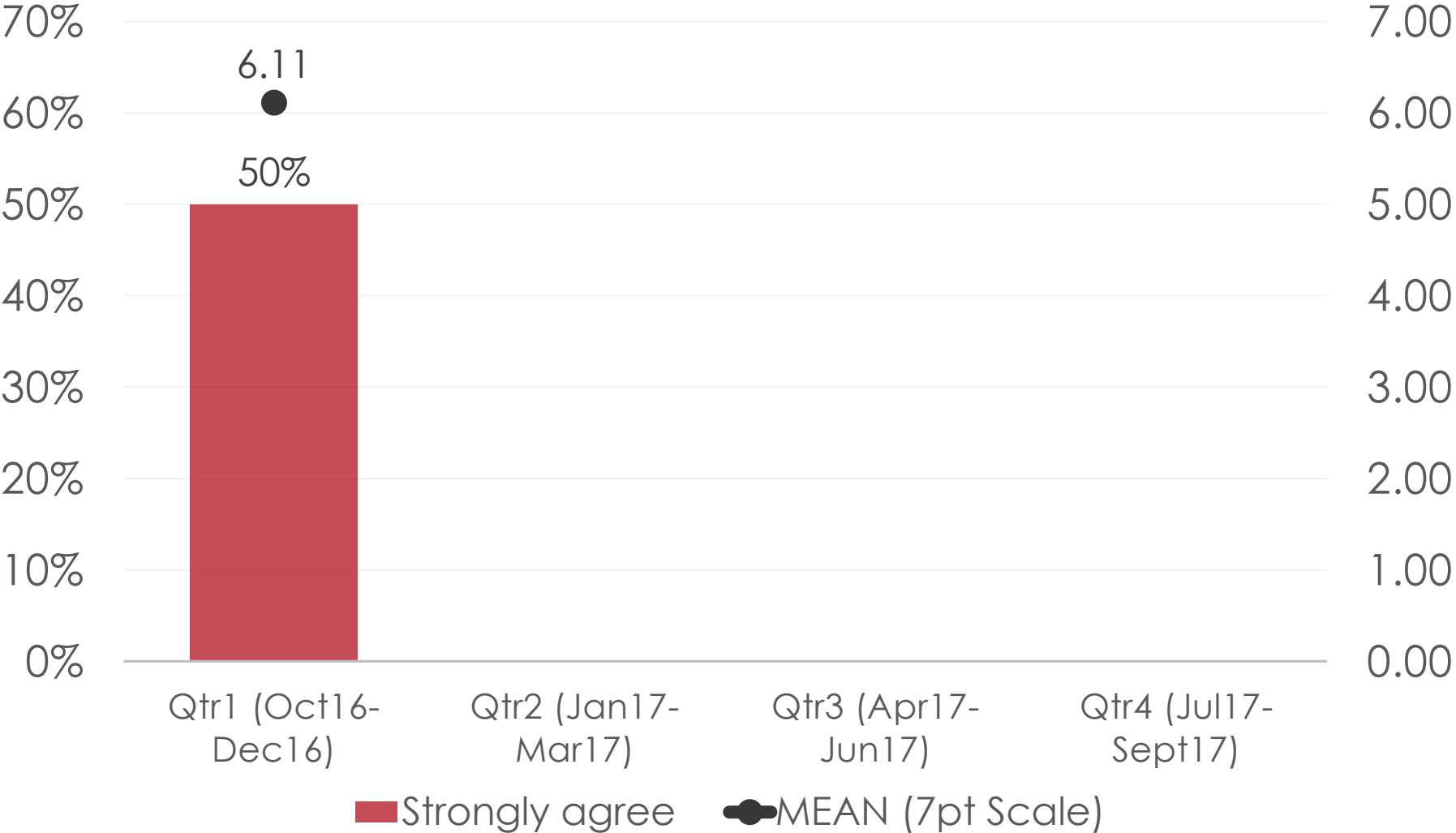
I had no communication problems



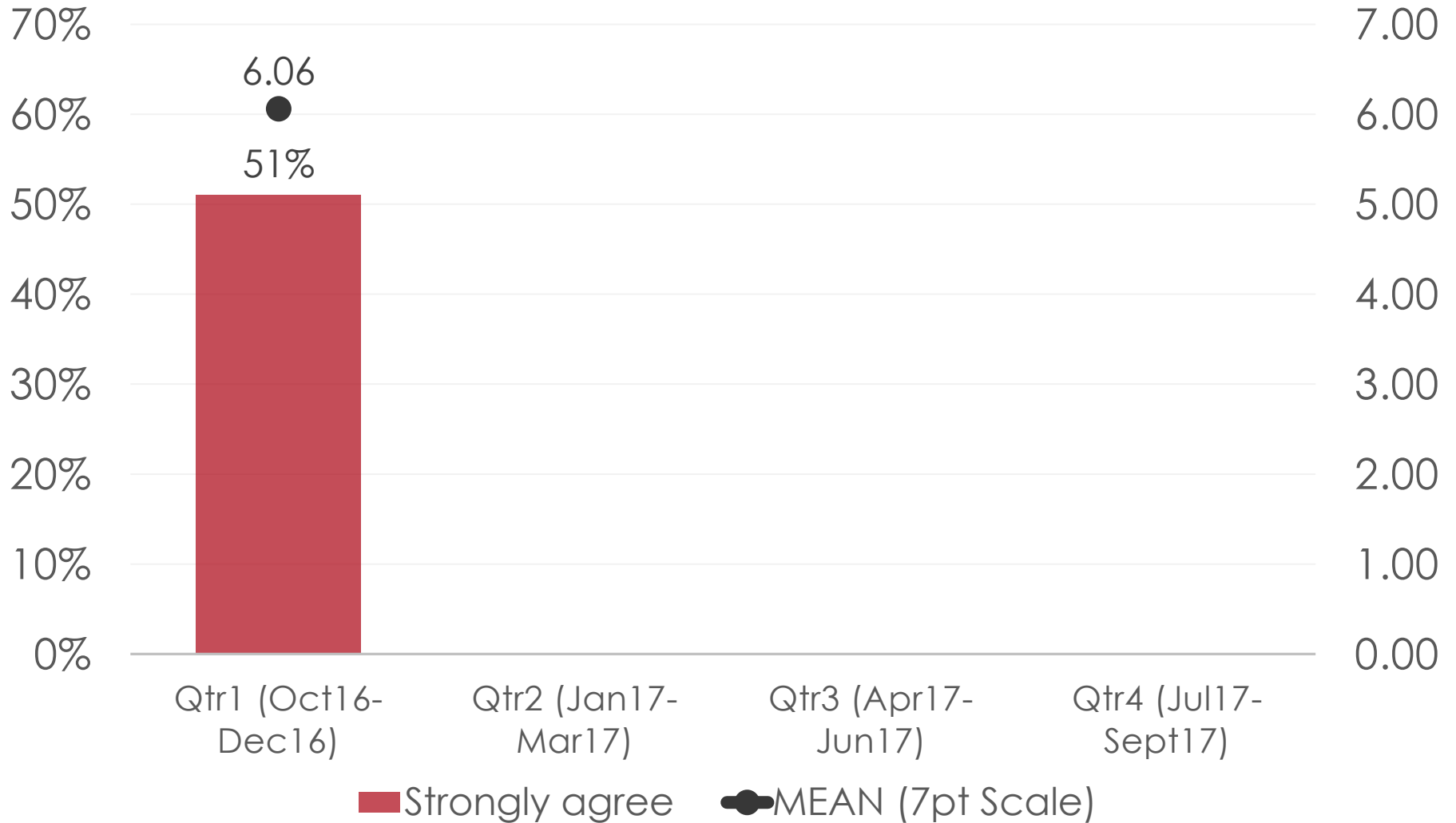
I will recommend Guam to friends



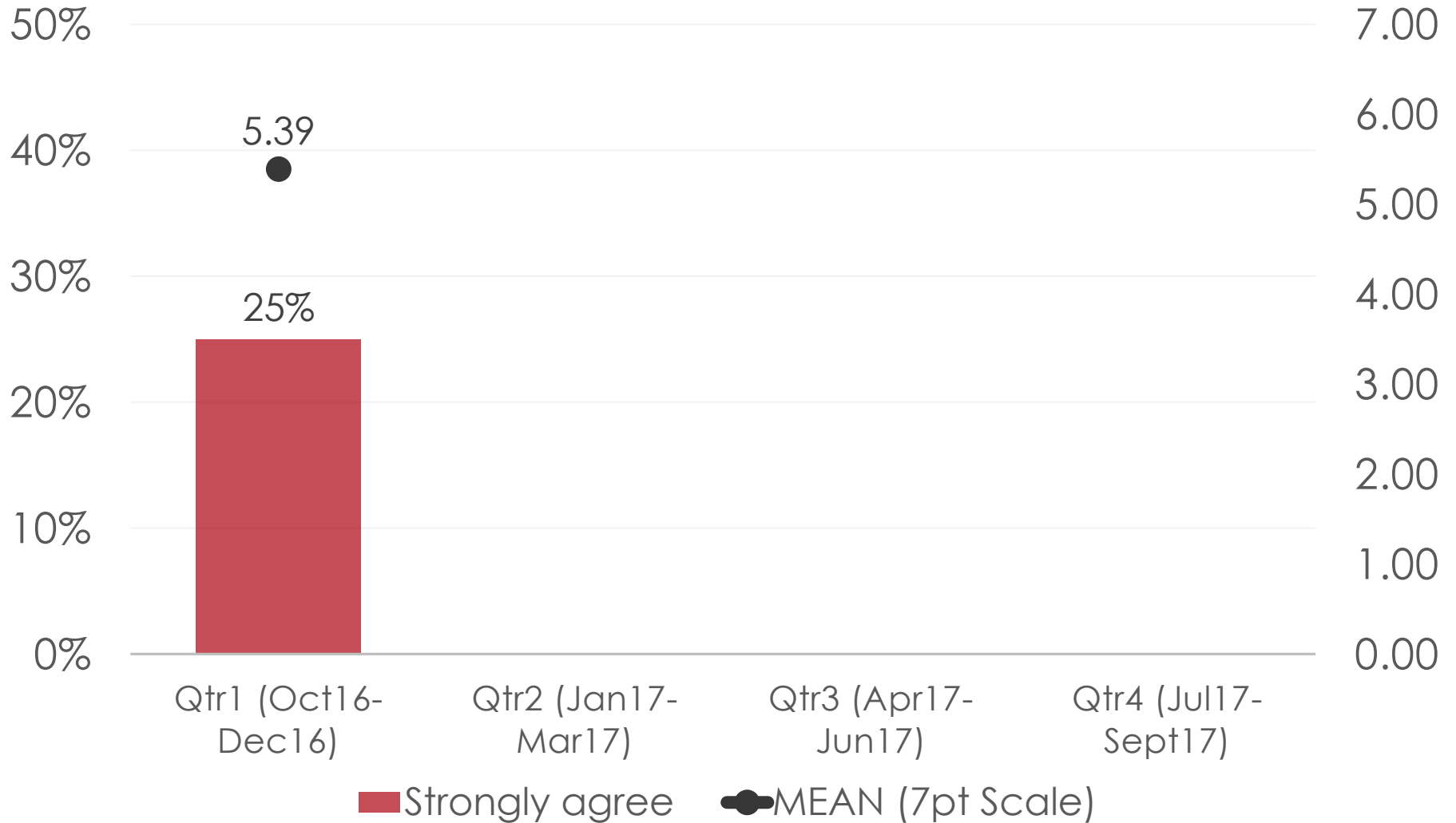
Sites on Guam were attractive



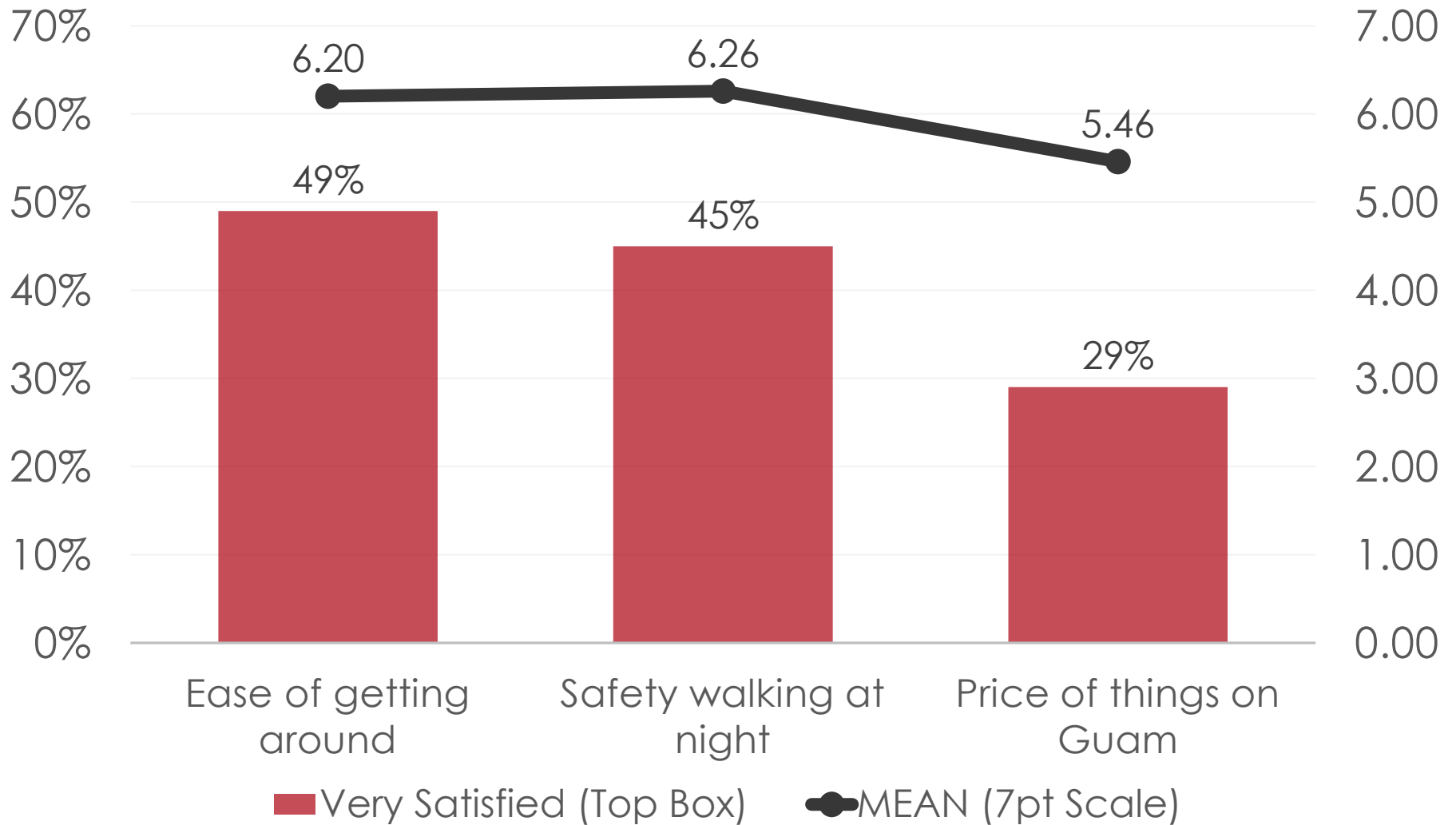
I plan to visit Guam again



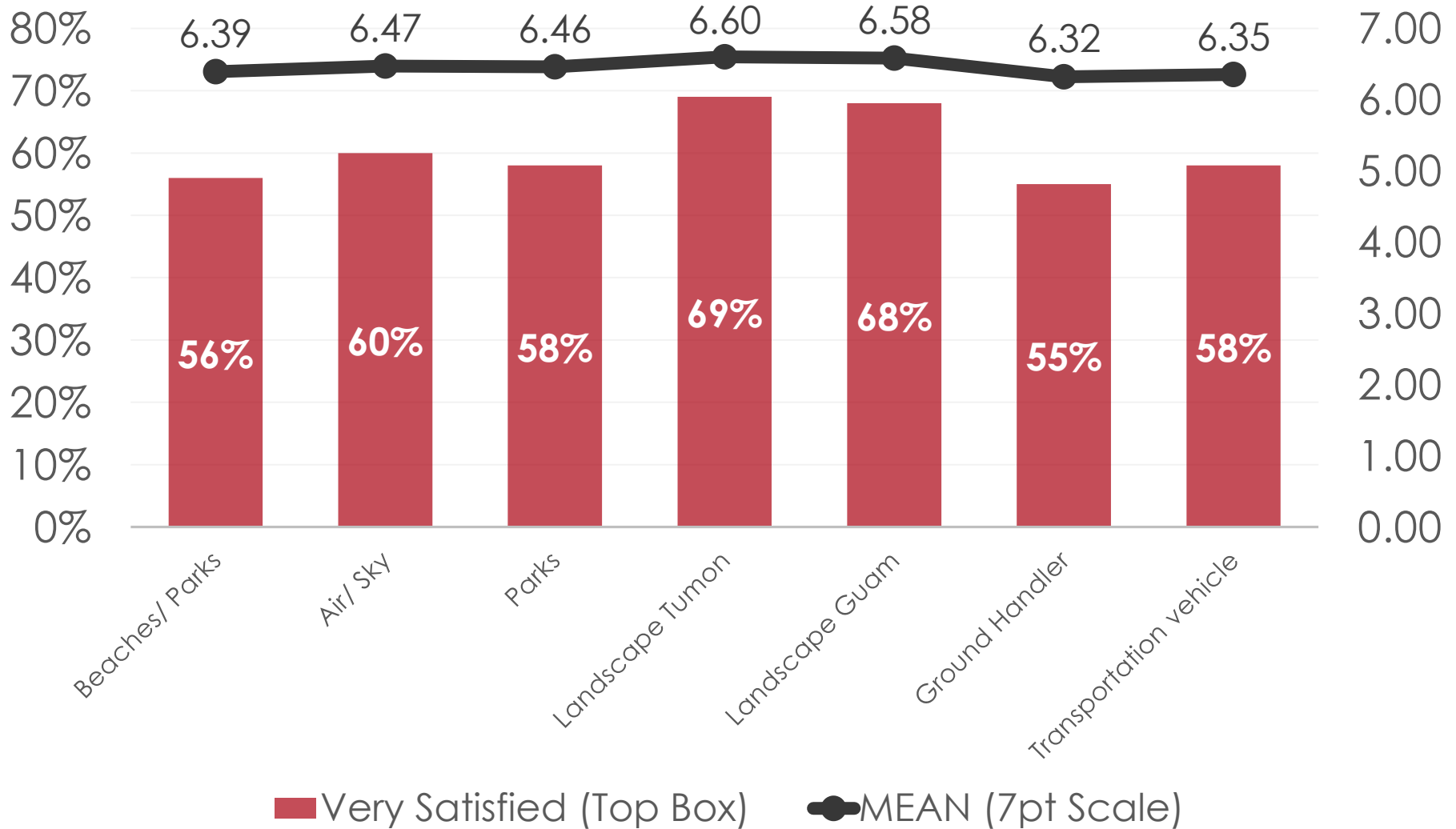
Not enough night time activities



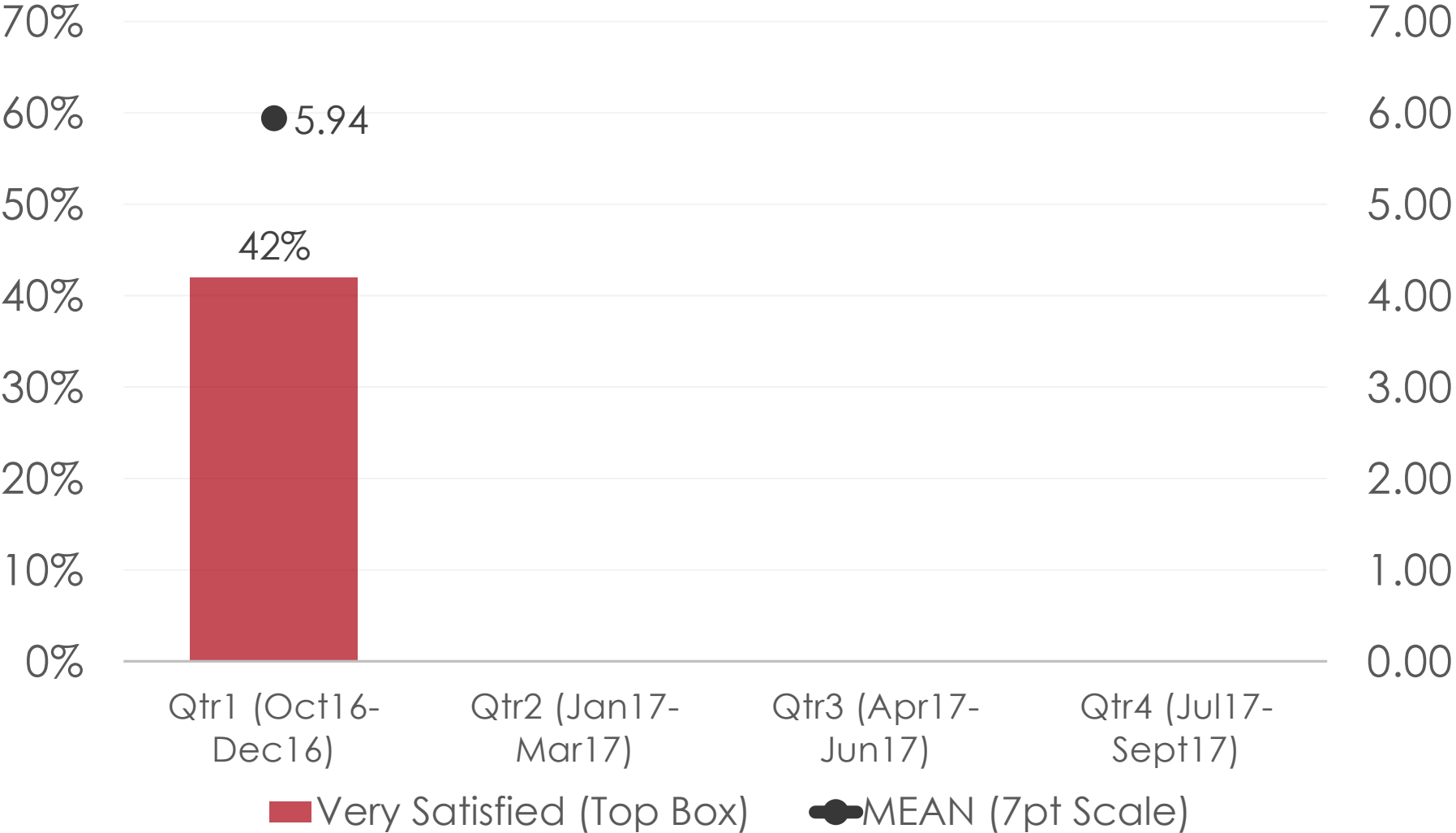
GENERAL SATISFACTION



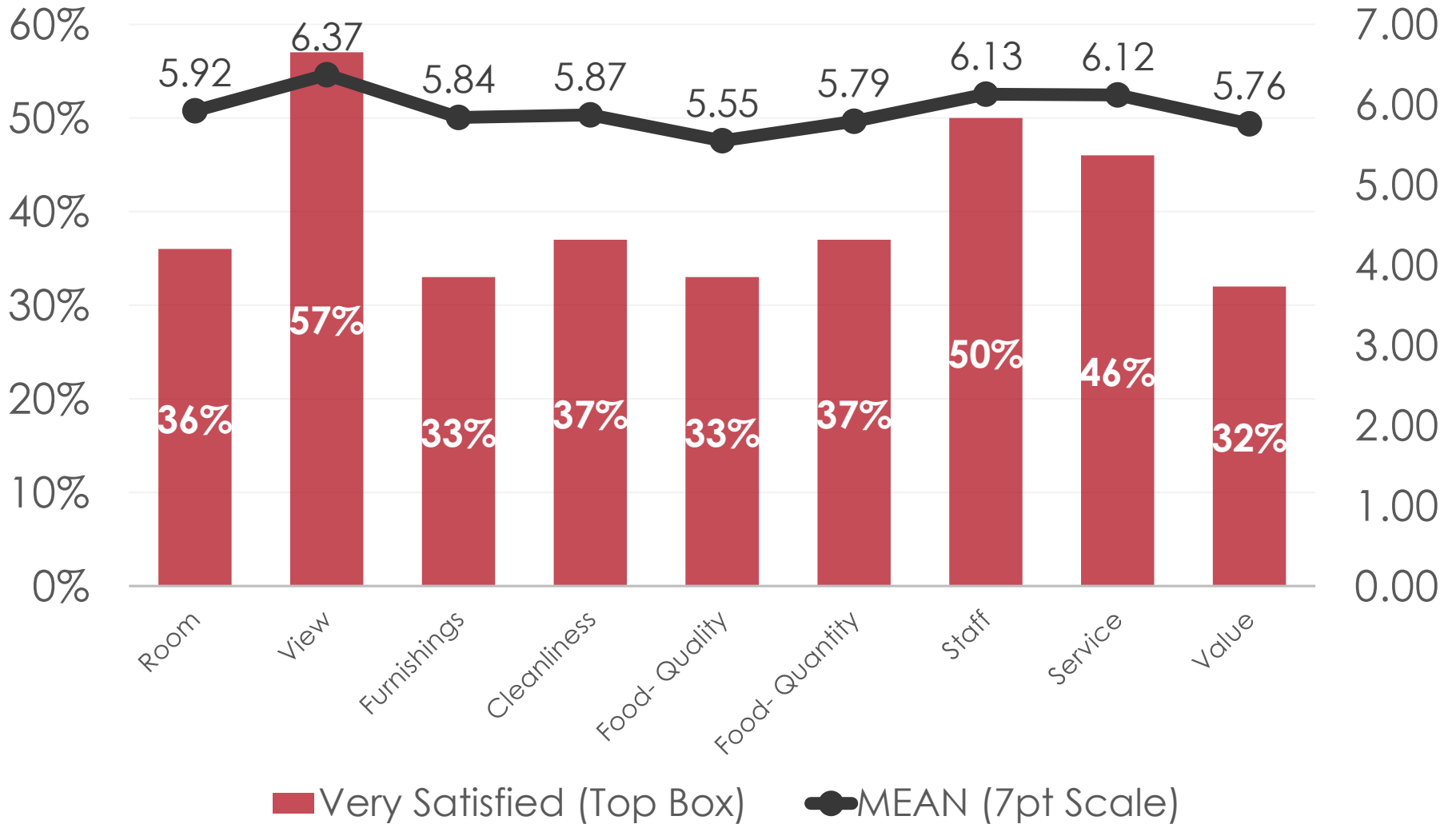
GENERAL SATISFACTION – Quality/ Cleanliness



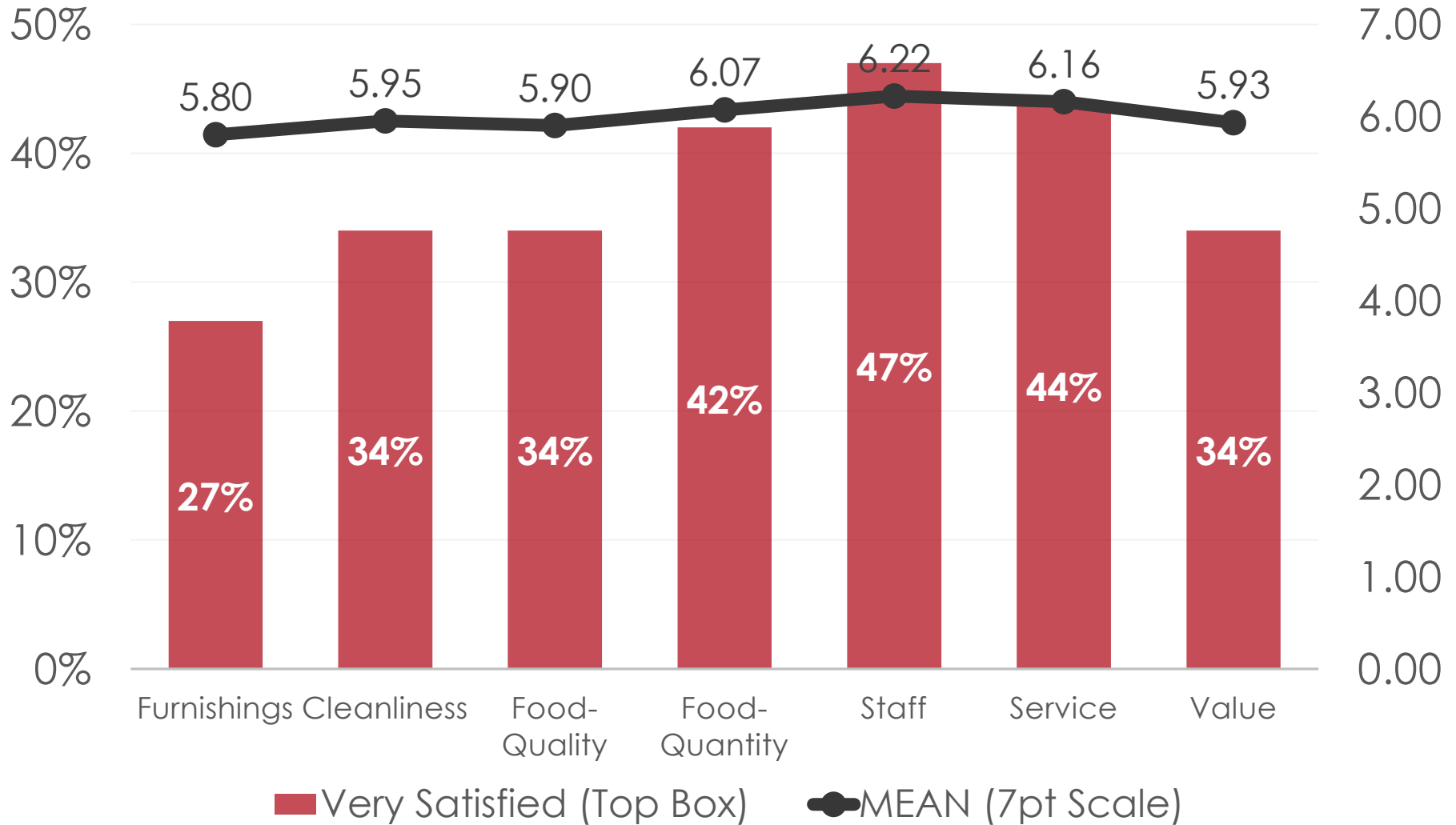
ACCOMMODATIONS – OVERALL SATISFACTION



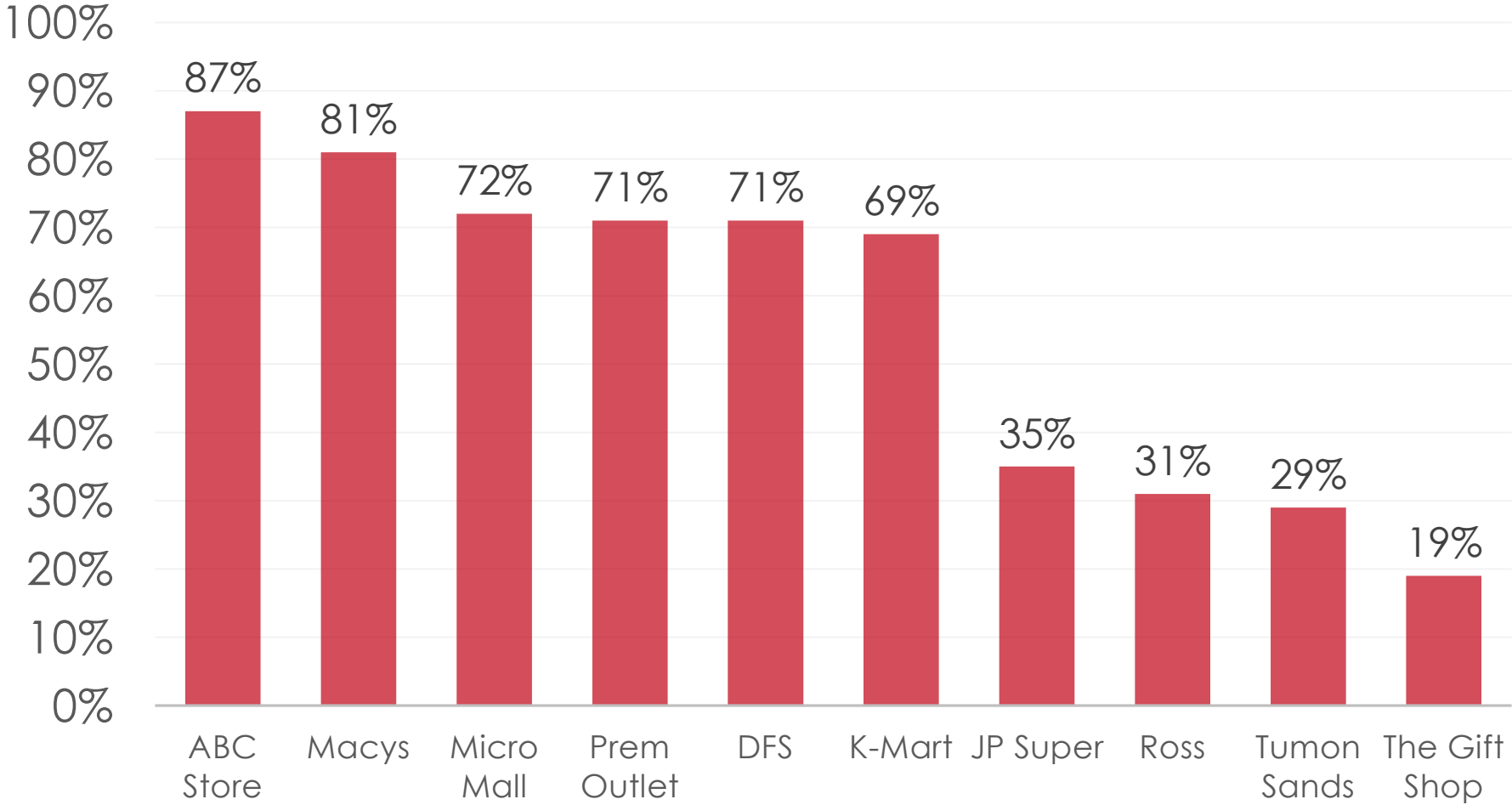
ACCOMMODATIONS – Satisfaction by Category



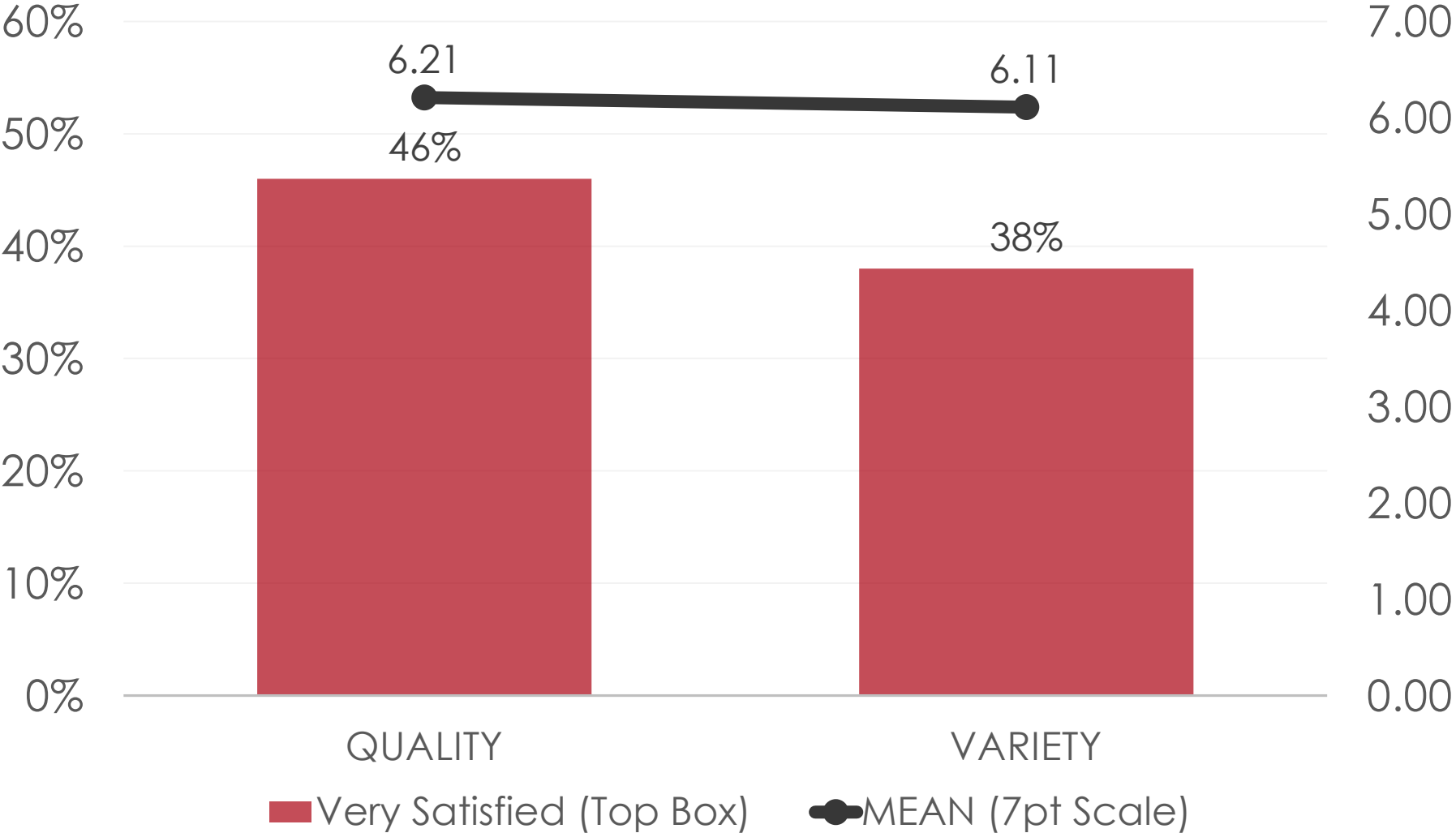
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



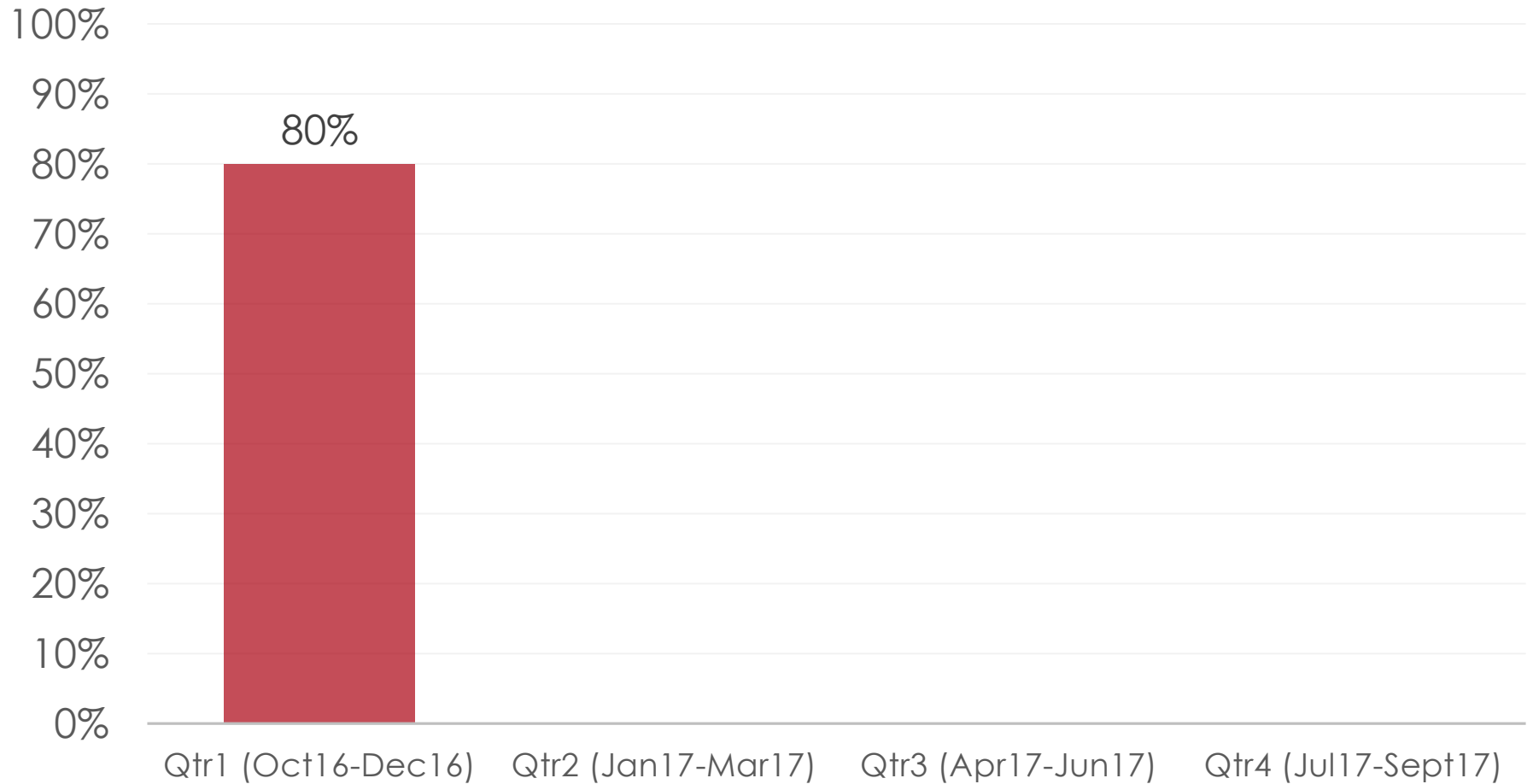
Shopping Malls/ Stores (Top Responses)



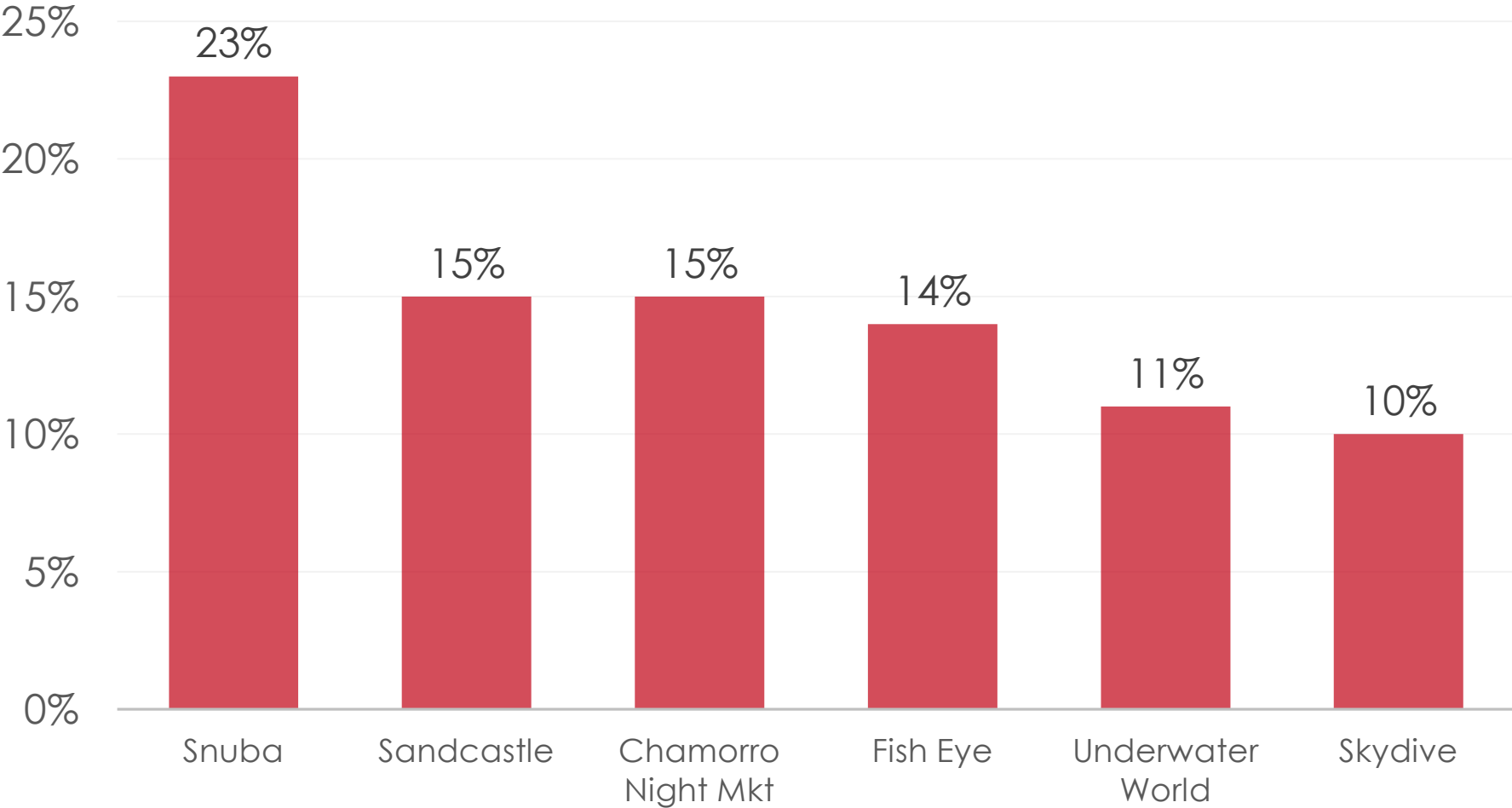
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

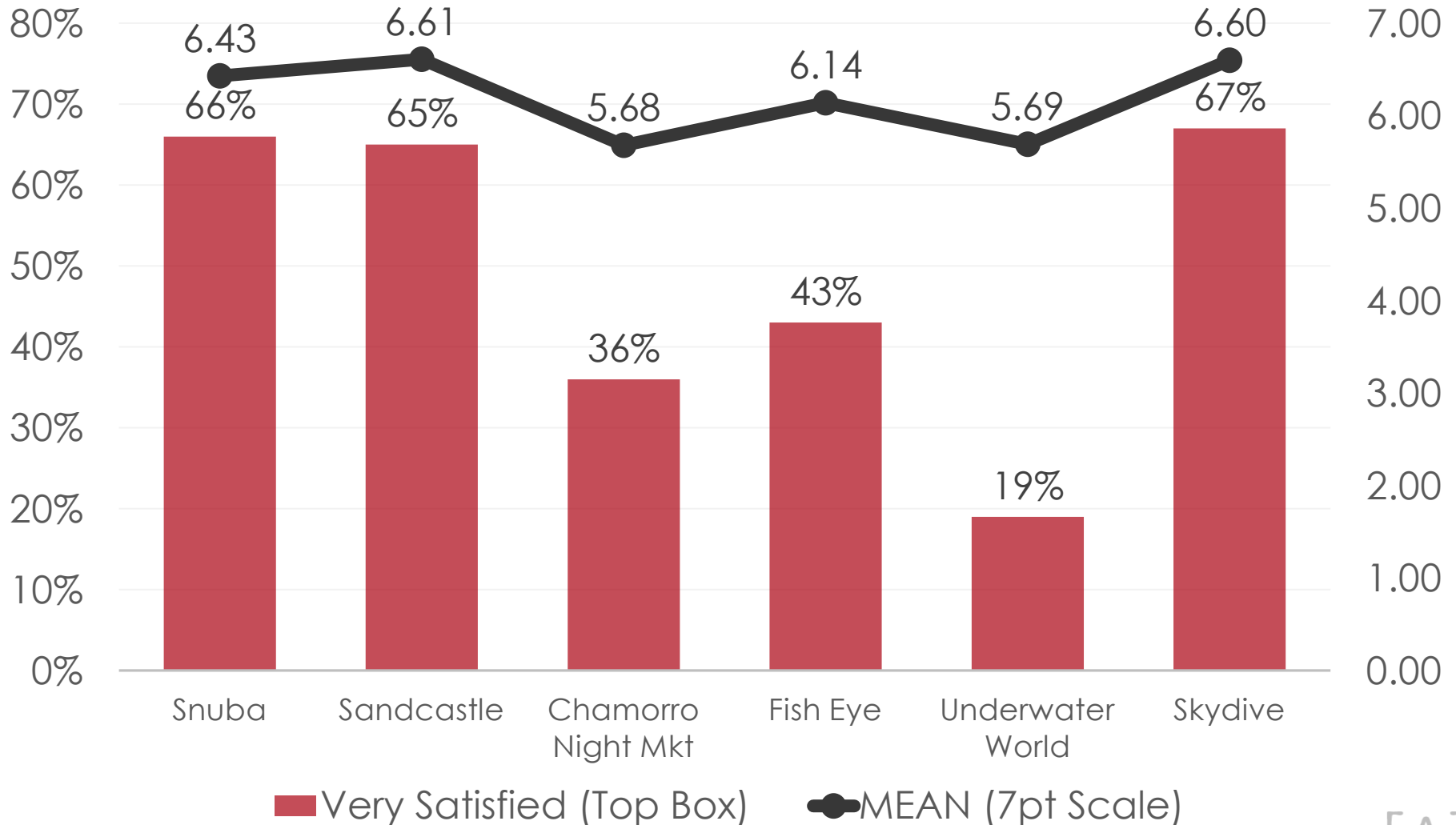


Optional Tour Participation (Top Responses)

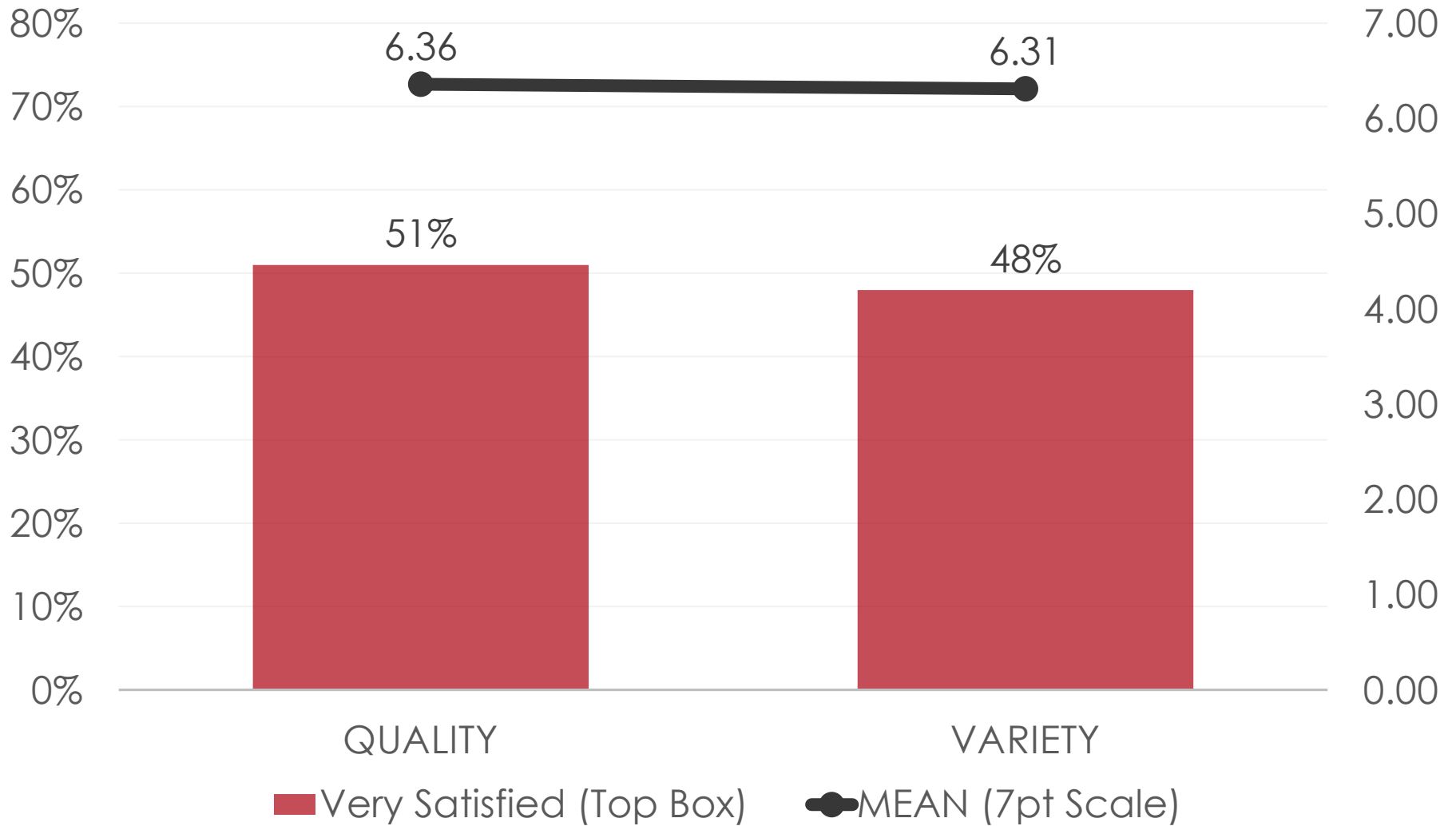


Optional Tour Satisfaction

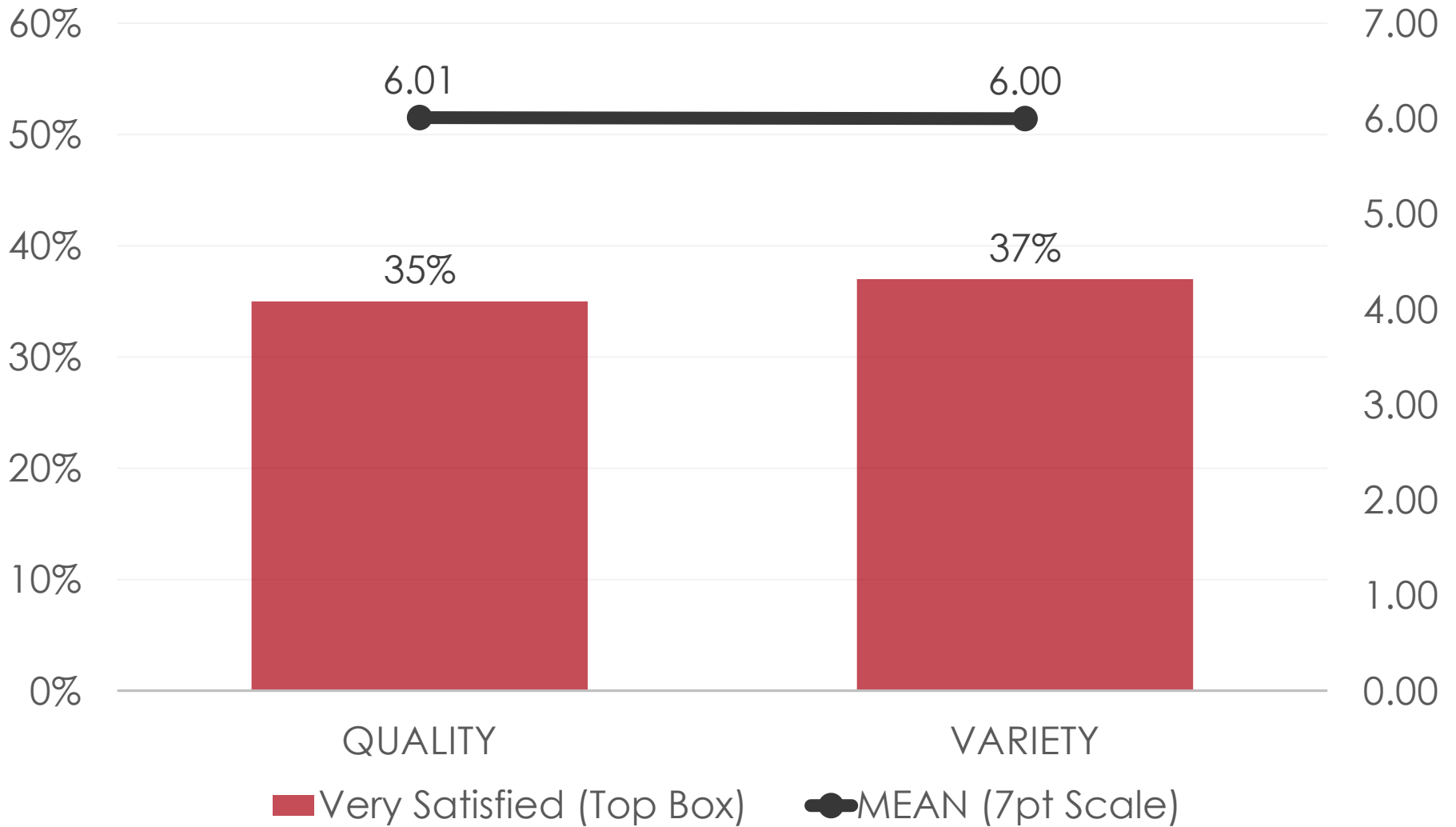
Top Responses only - Participation (10%+)



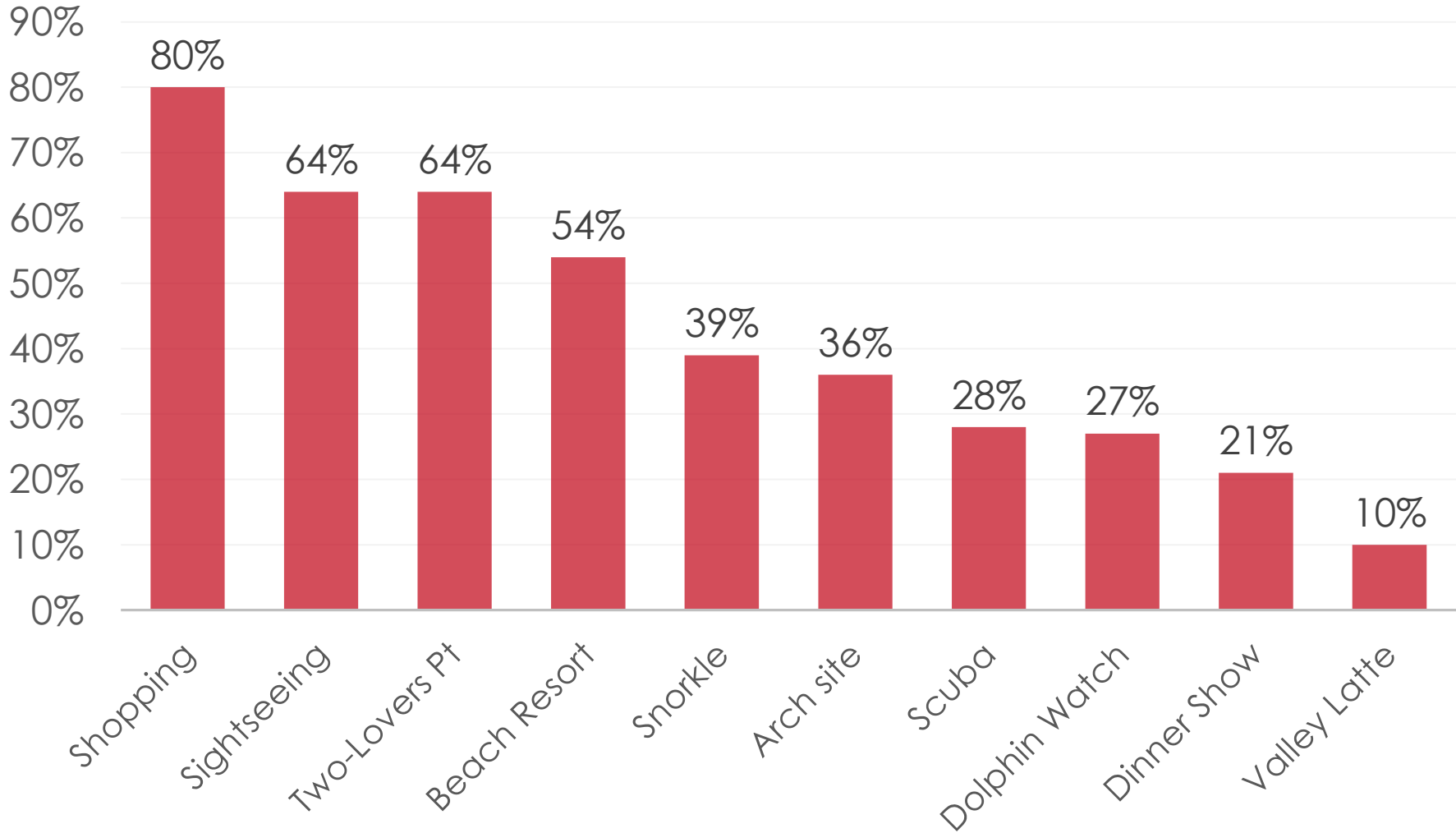
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

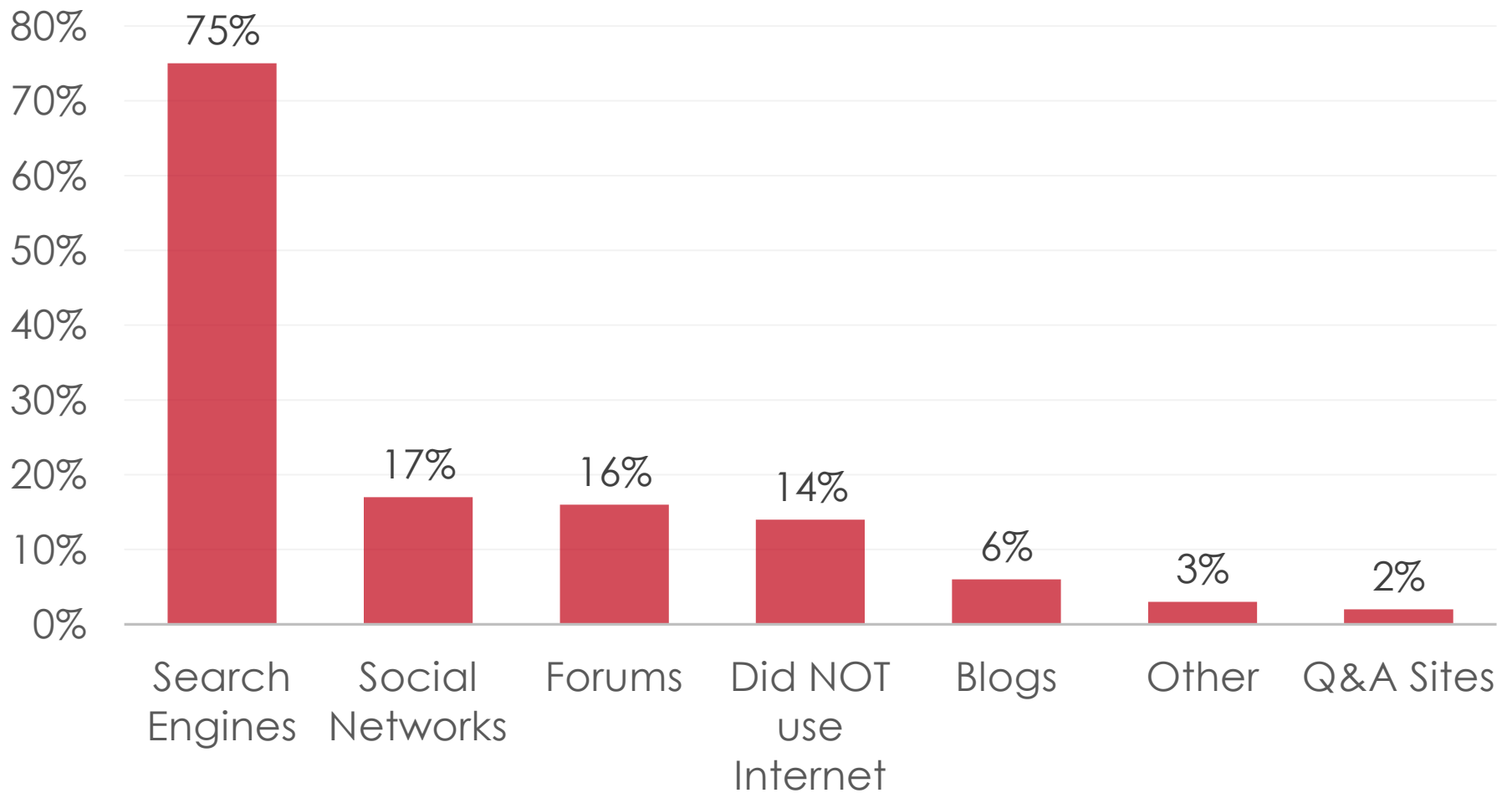


Activities Participation (Top Responses)



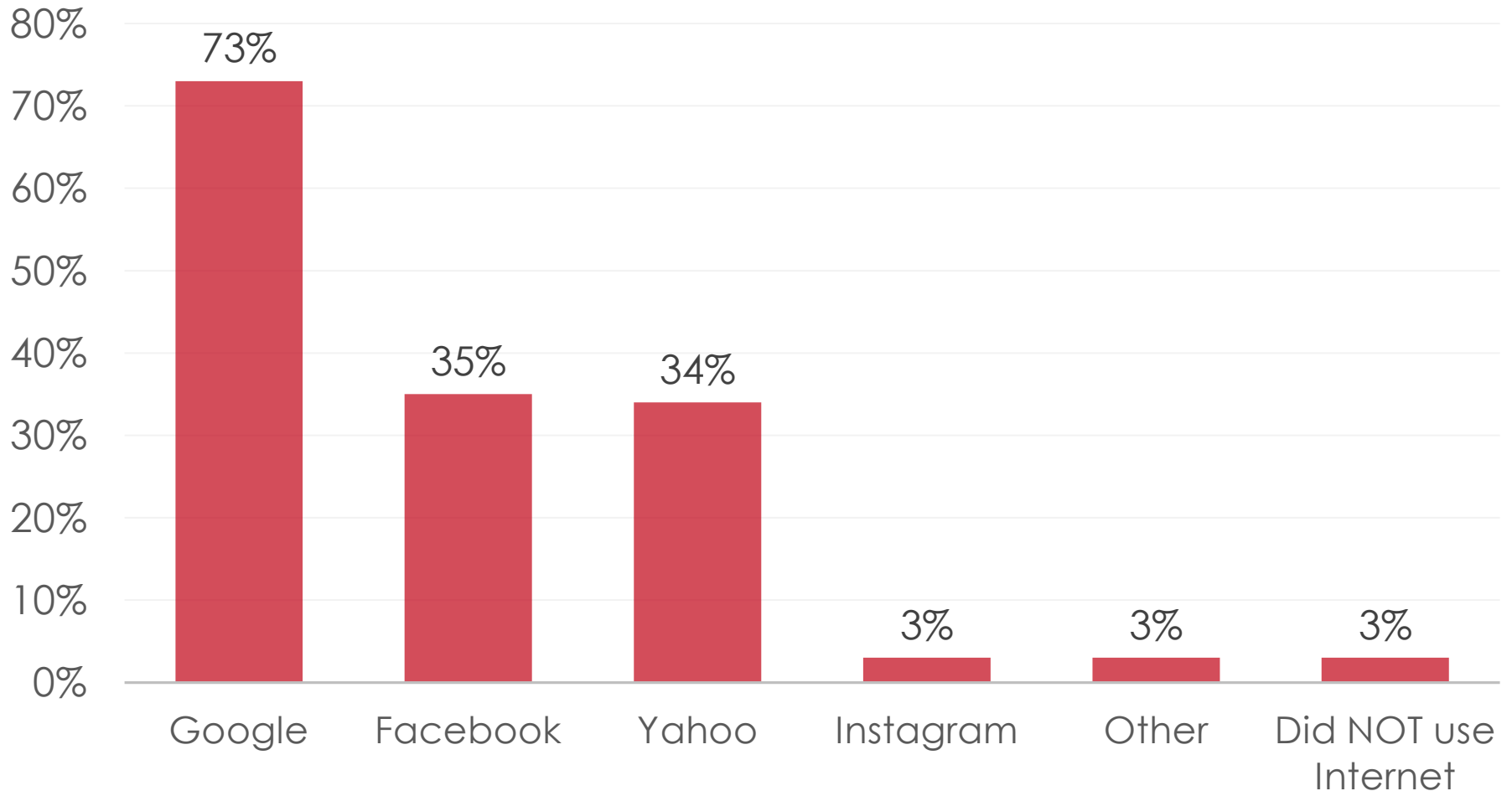
SECTION 5 PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



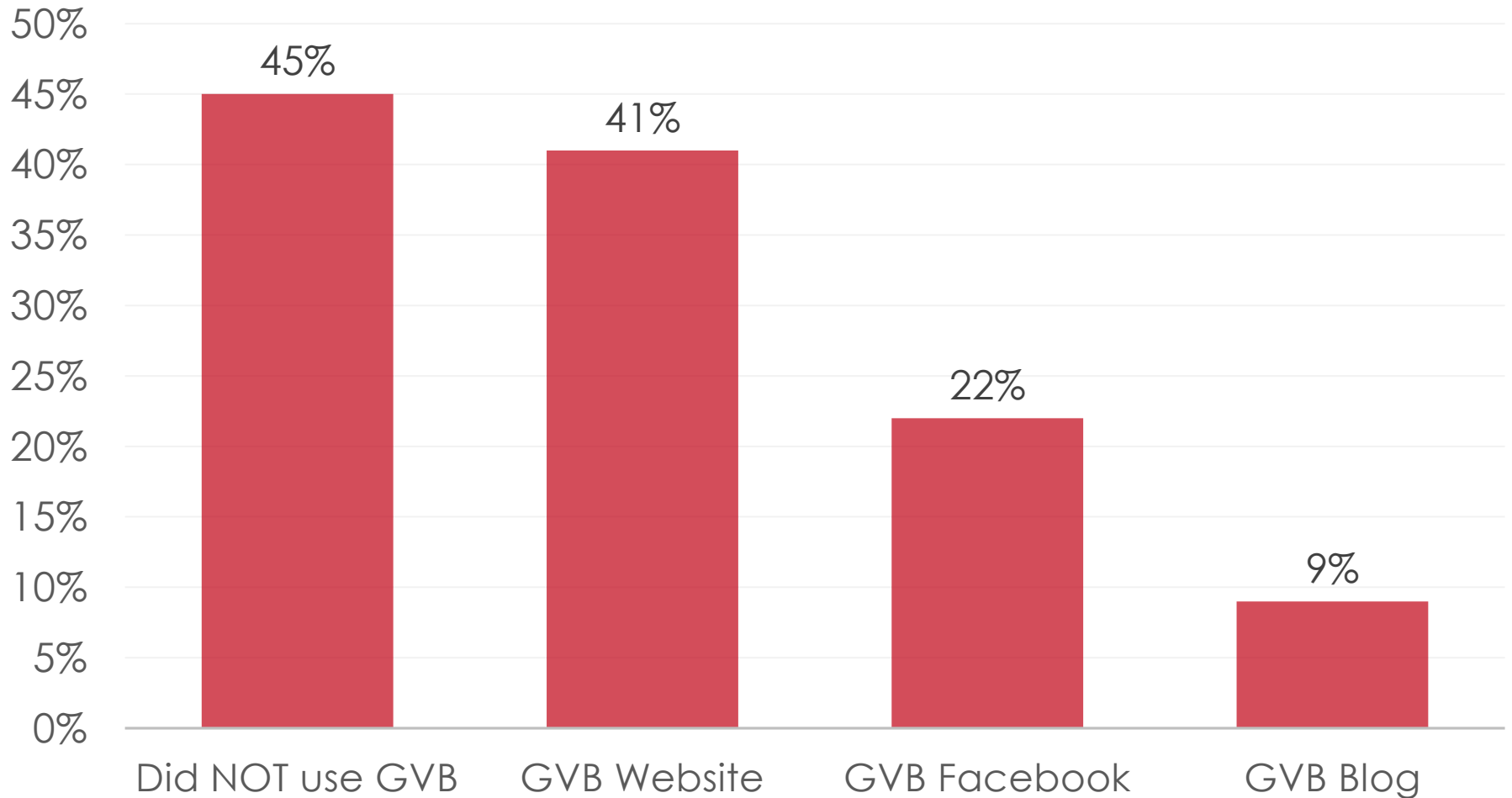
INTERNET- SOURCES OF INFORMATION

Things to do on Guam

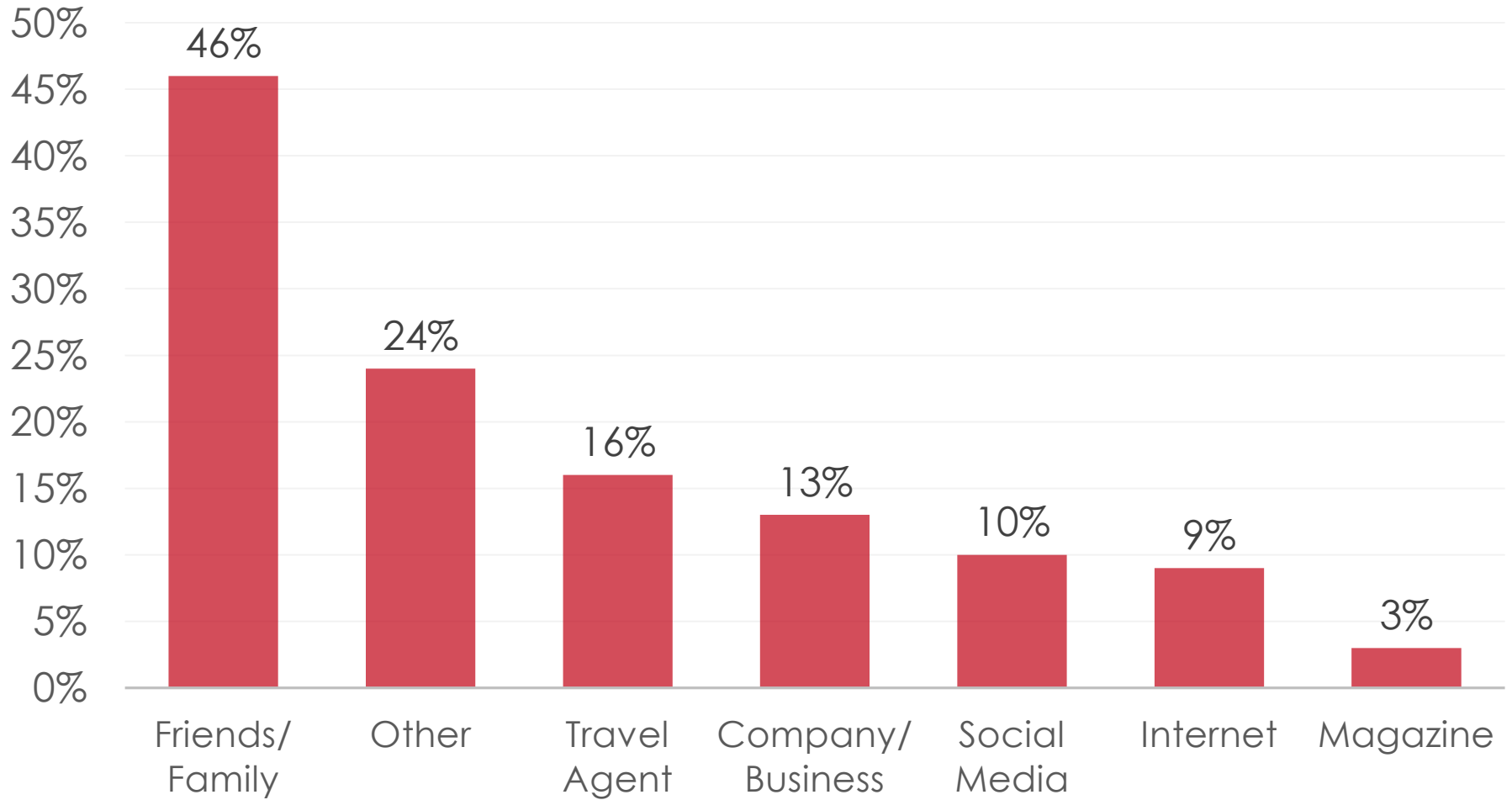


INTERNET- SOURCES OF INFORMATION

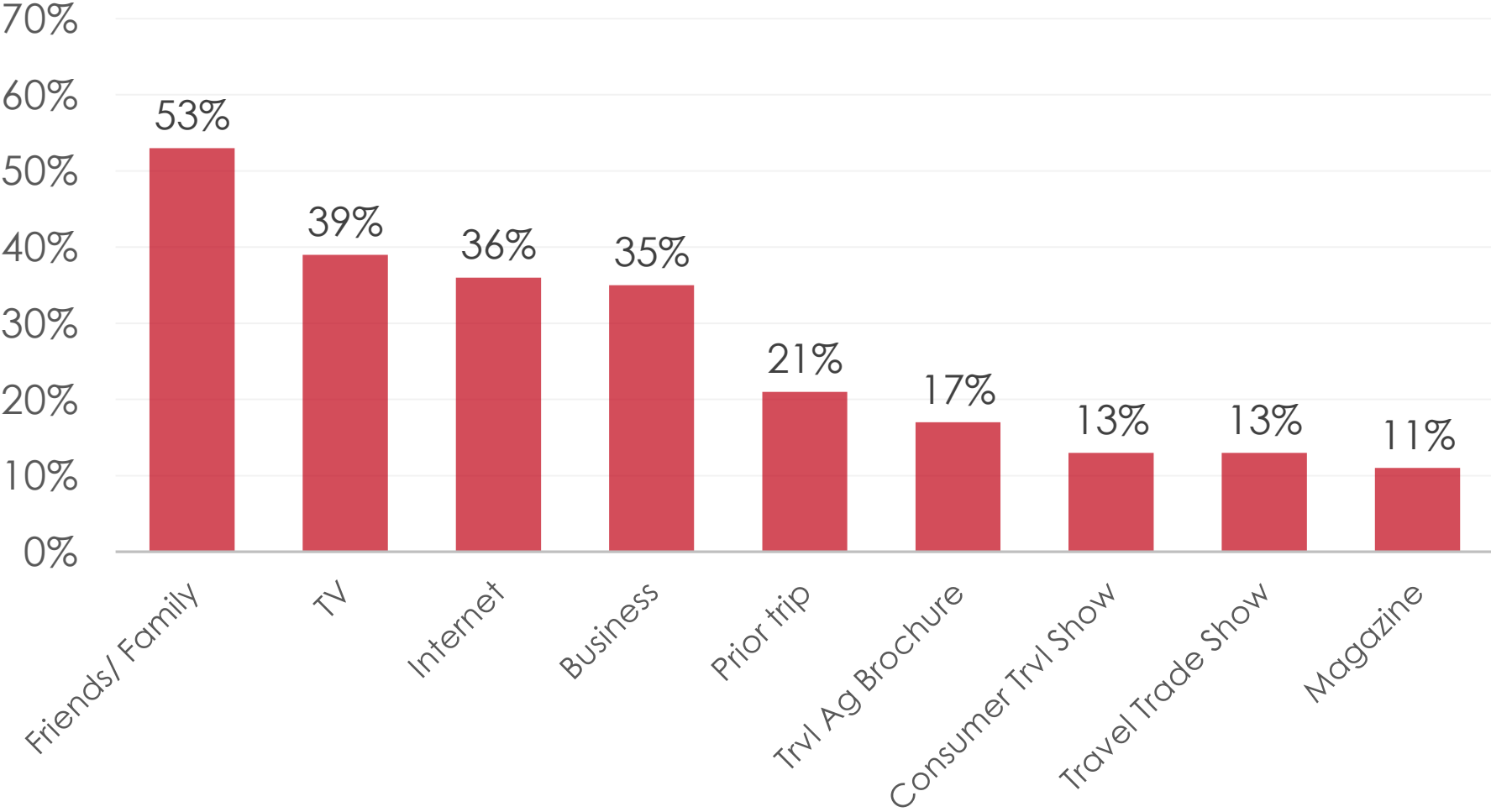
GVB



TRAVEL MOTIVATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

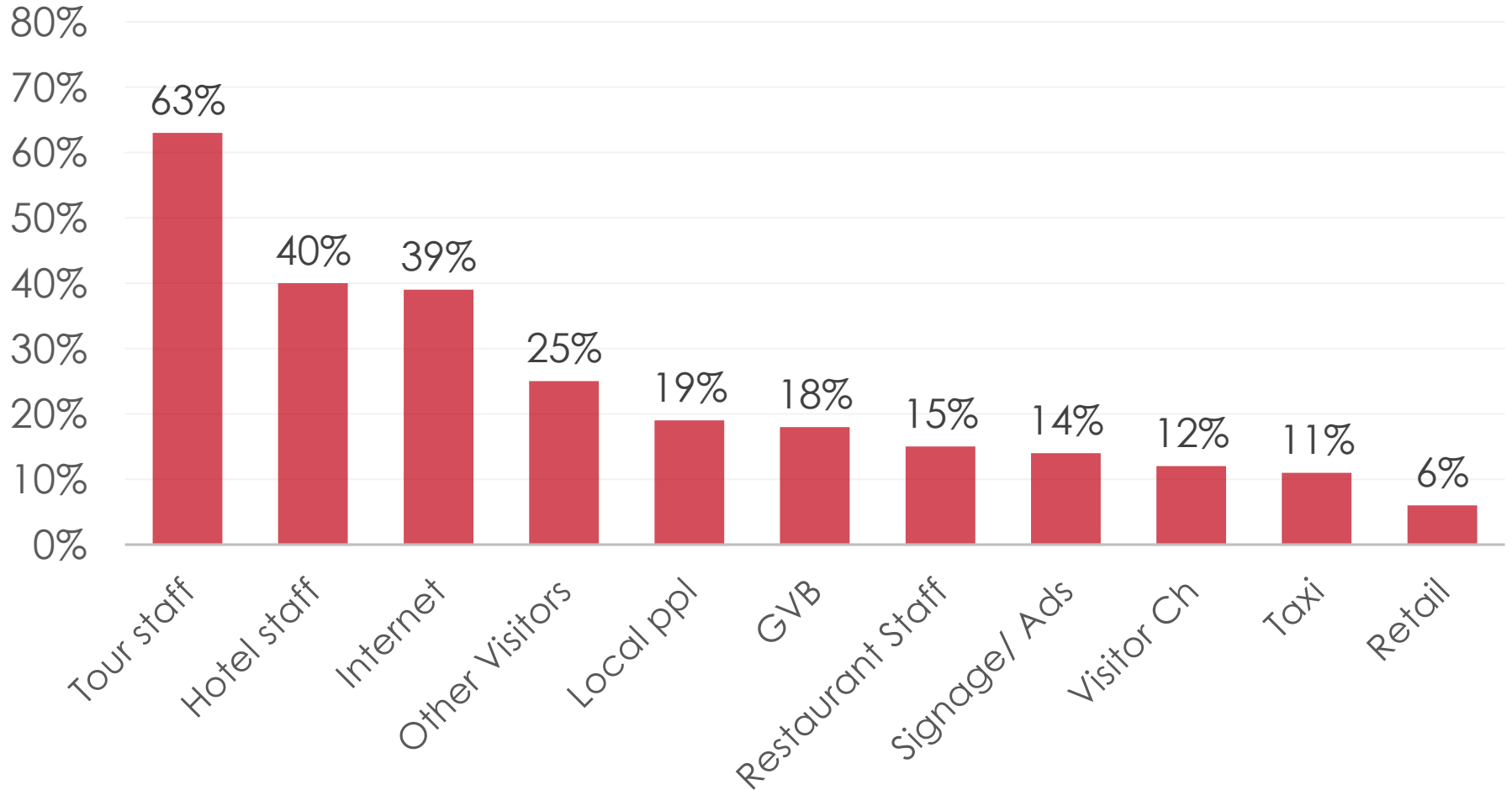
Q1 Please select the top 3 sources of information you used to find out about Guam before you trip.

		TOTAL	MICE	SPORTS/ ADVENTURE	WEDDING	HONEYMOON
		-	-	-	-	-
Q1	Friend/ Relative	53%		58%	70%	65%
	TV	39%		42%	50%	40%
	Internet	36%		42%	50%	60%
	Co-Worker/ Company Trvl Dept	35%	67%	32%	10%	15%
	Prior Trip	21%	33%	15%	10%	10%
	Travel Agent Brochure	17%	33%	13%	20%	10%
	Consumer Trvl Show	13%		16%	20%	10%
	Travel Trade Show	13%	33%	14%		25%
	Magazine (Consumer)	11%		11%		10%
	GVB Promo	9%		8%	10%	
	Travel Guidebook- Bookstore	9%		11%		5%
	Newspaper	4%		2%	10%	10%
	Other	2%		1%		5%
	Theater Ad	2%		1%		
	Radio	1%				
	GVB Office	1%				
	Total	150	3	85	10	20

Prepared by QMark Research

ONISLE

SOURCES OF INFORMATION



ON-ISLE SOURCES OF INFORMATION – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q2 Please select the top 3 sources of information you used to find out about Guam while you were here.

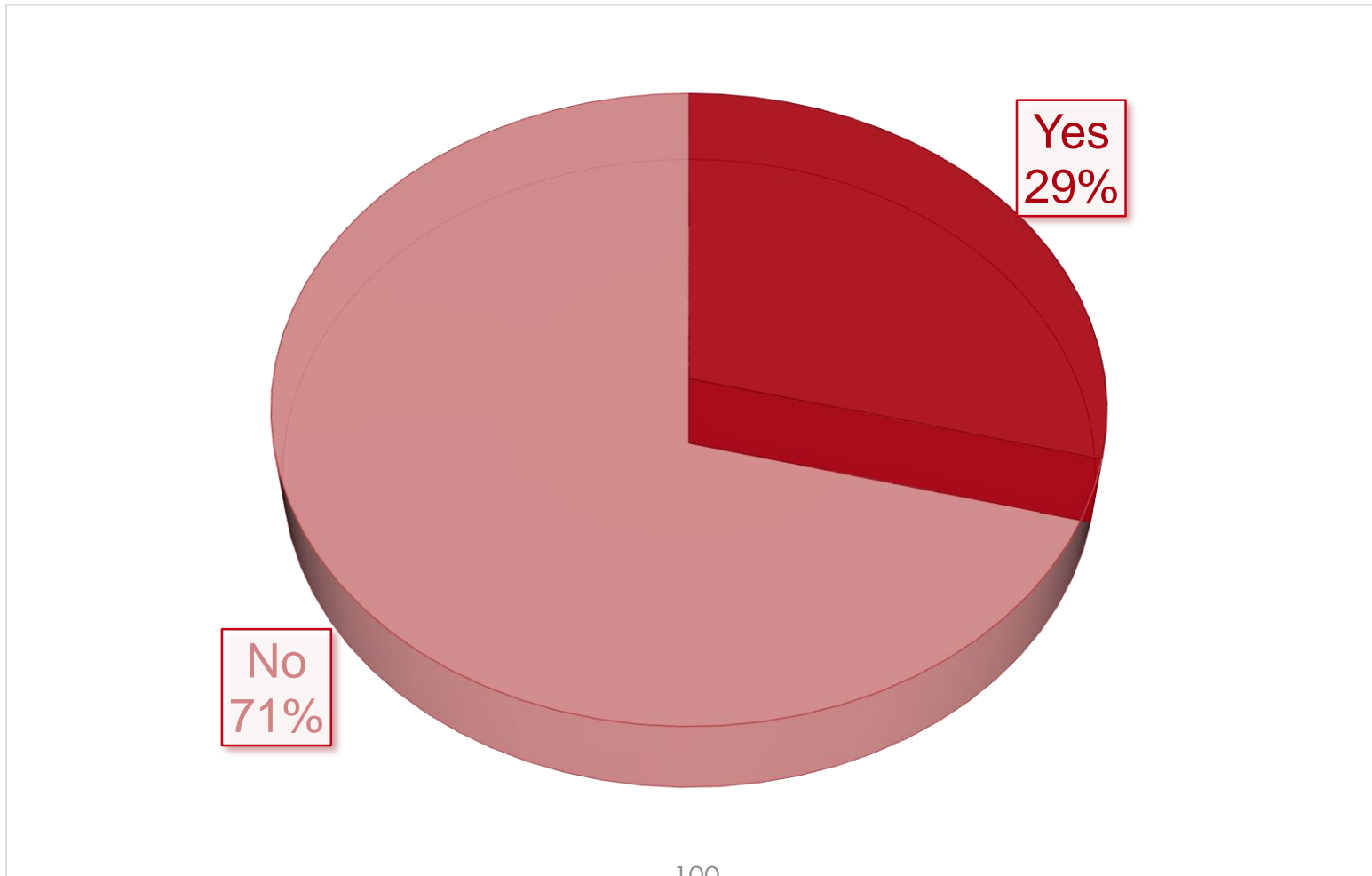
		TOTAL	MICE	SPORTS/ ADVENTURE	WEDDING	HONEYMOON
		-	-	-	-	-
Q2	Tour Staff	63%	100%	60%	60%	63%
	Hotel Staff	40%		35%	50%	42%
	Internet	39%		50%	30%	68%
	Other Visitors	25%		34%	30%	37%
	Local Ppl	19%		16%	20%	11%
	GVB	18%		13%	20%	
	Restaurant Staff	15%	33%	9%	20%	
	Signs/ Advertisement	14%		14%	10%	16%
	Visitor Channel	12%		15%		16%
	Taxi Driver	11%		4%	10%	5%
	Retail Staff	6%		8%	20%	5%
	Other	4%		5%		5%
	Local Publication	3%	33%			
	Total	142	3	80	10	19

Prepared by QMark Research

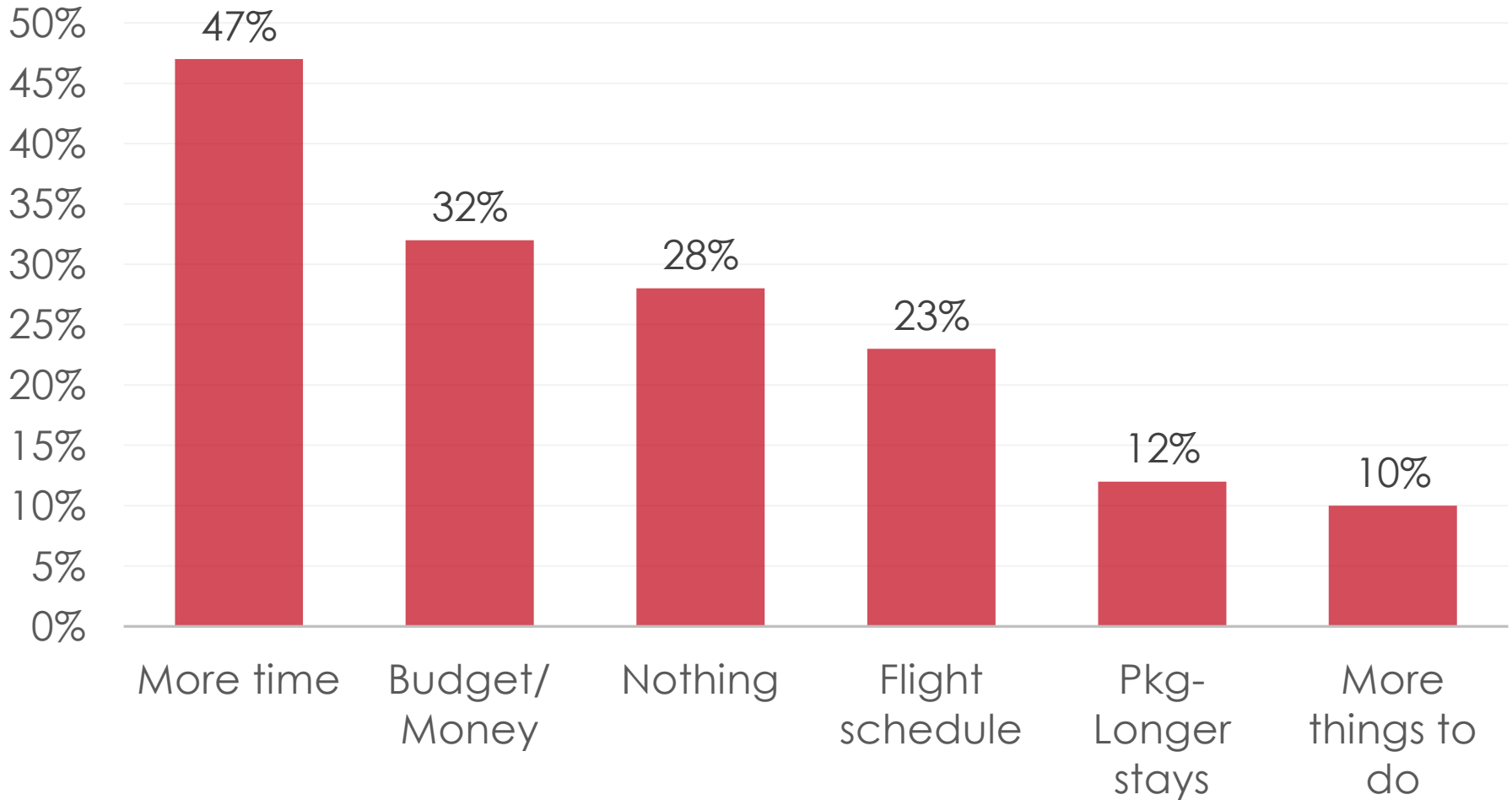
SECTION 6

FUTURE TRAVEL TO GUAM

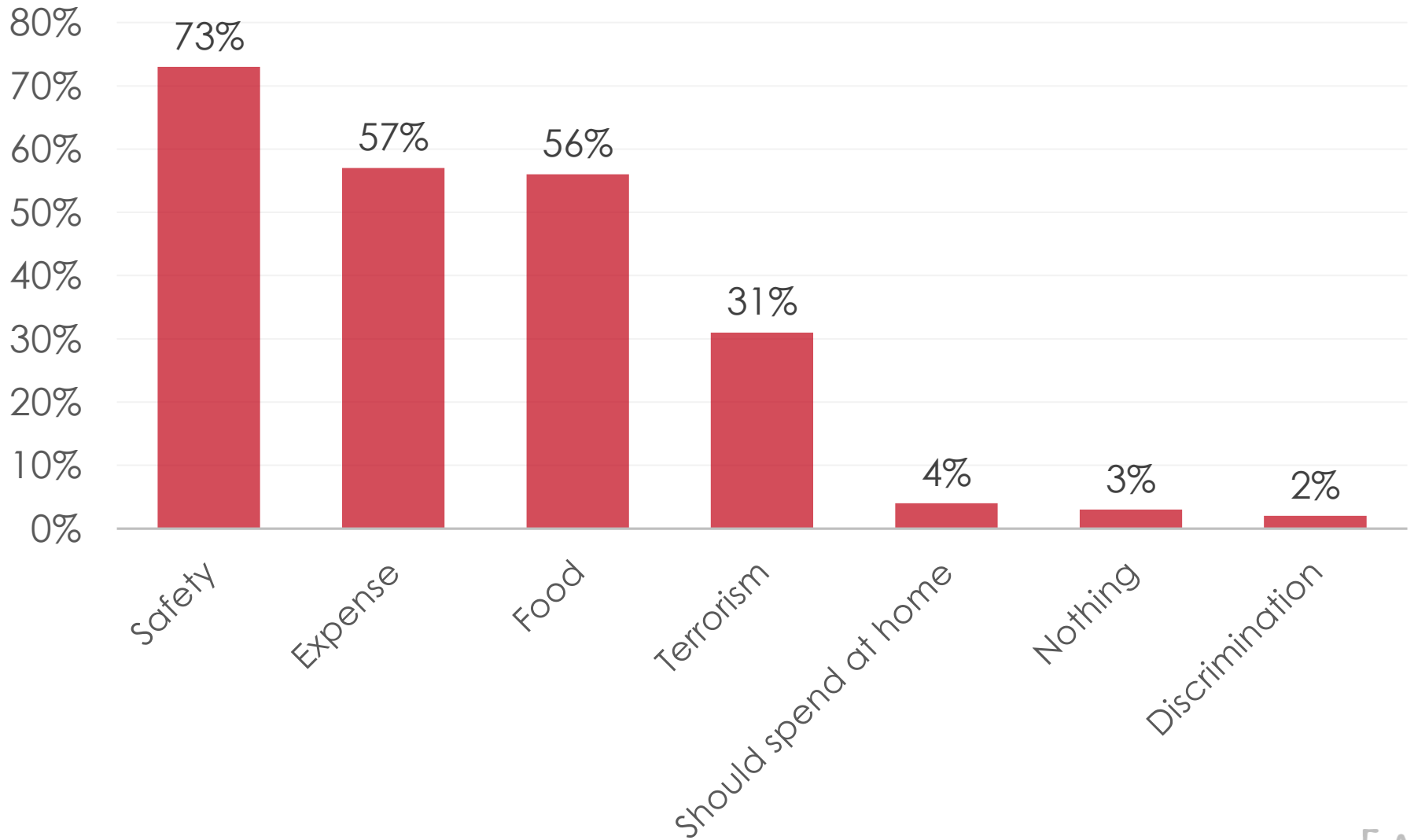
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



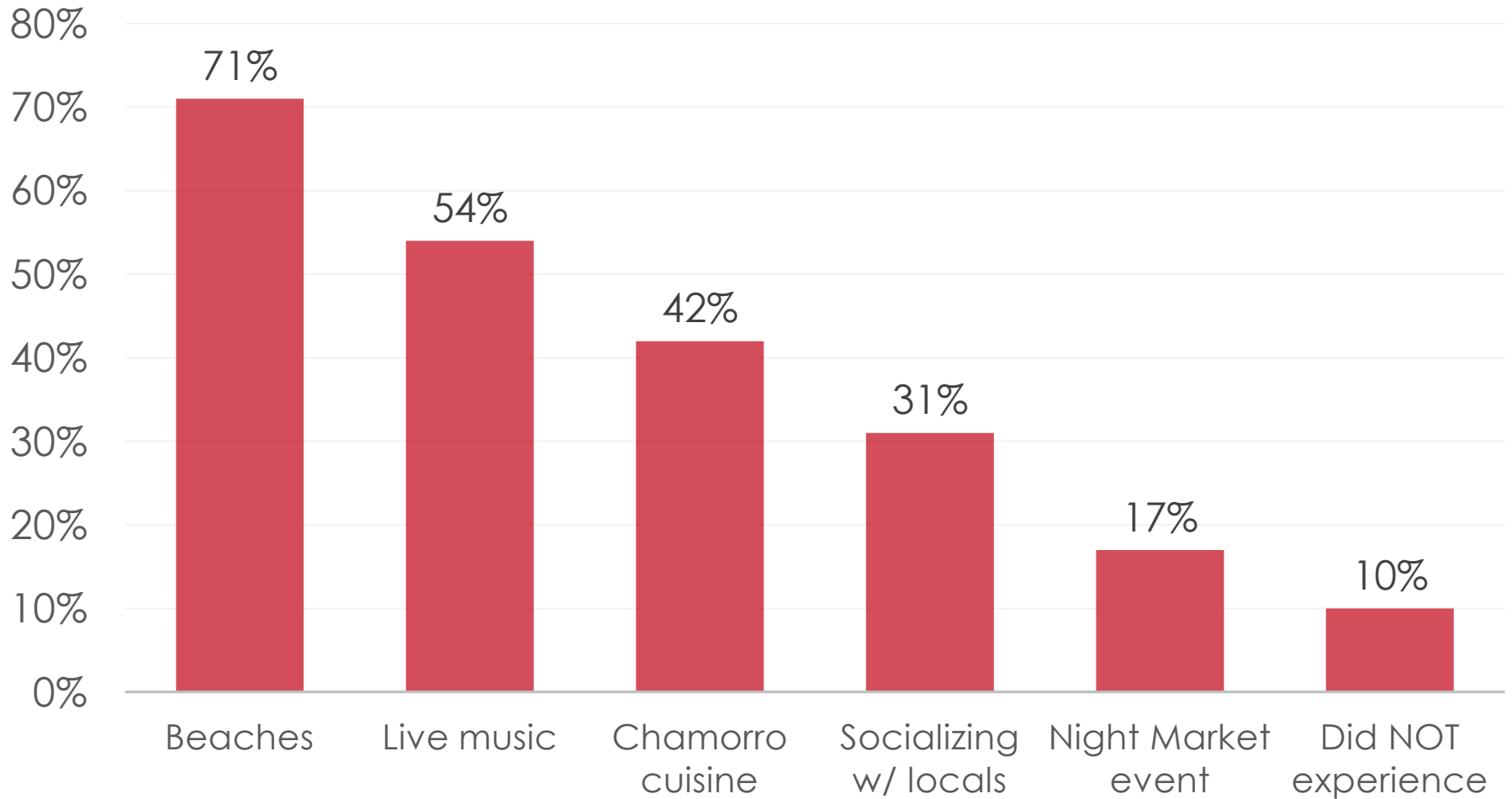
FUTURE TRAVEL CONCERNS



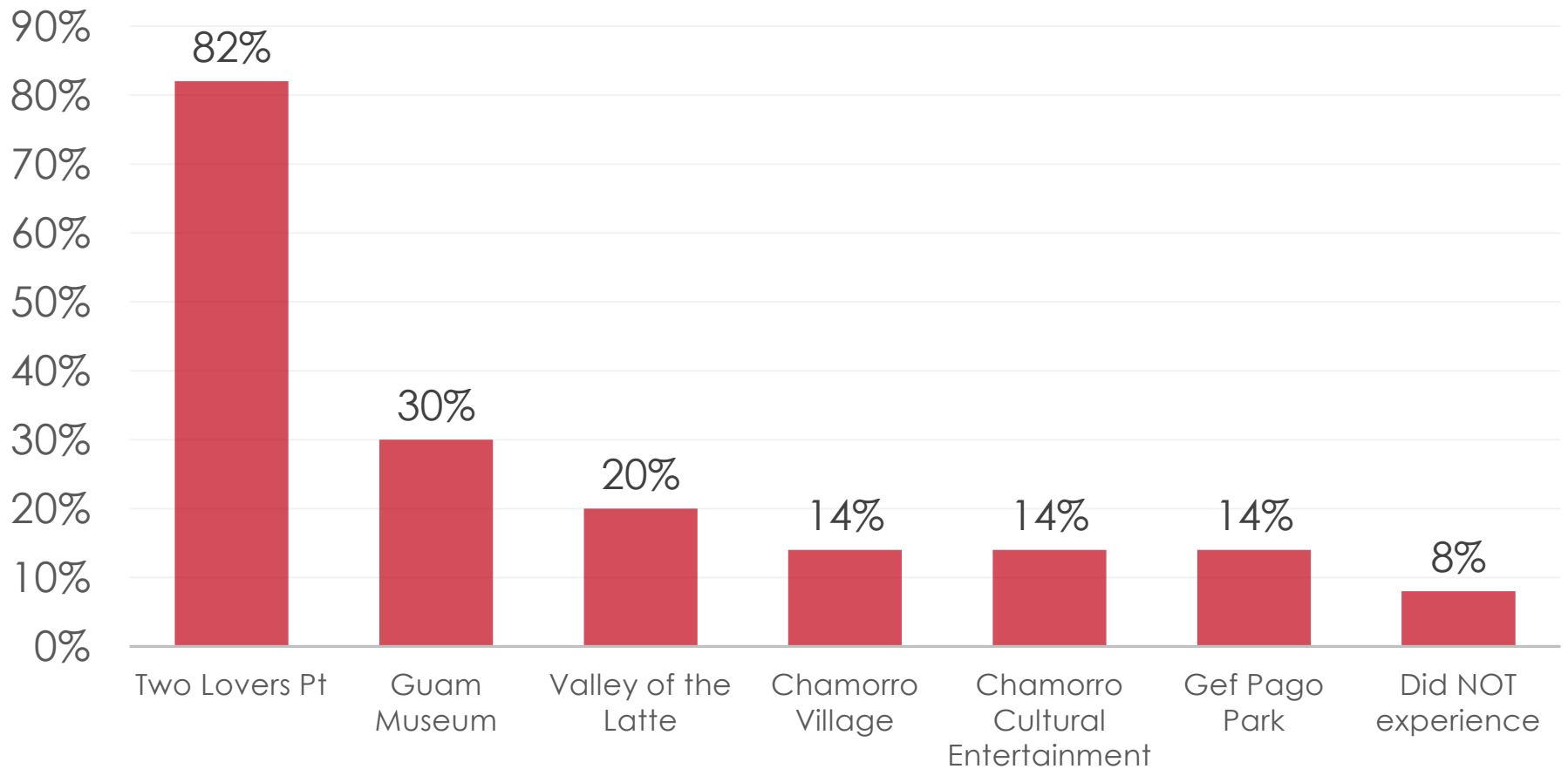
SECTION 7

GUAM CULTURE

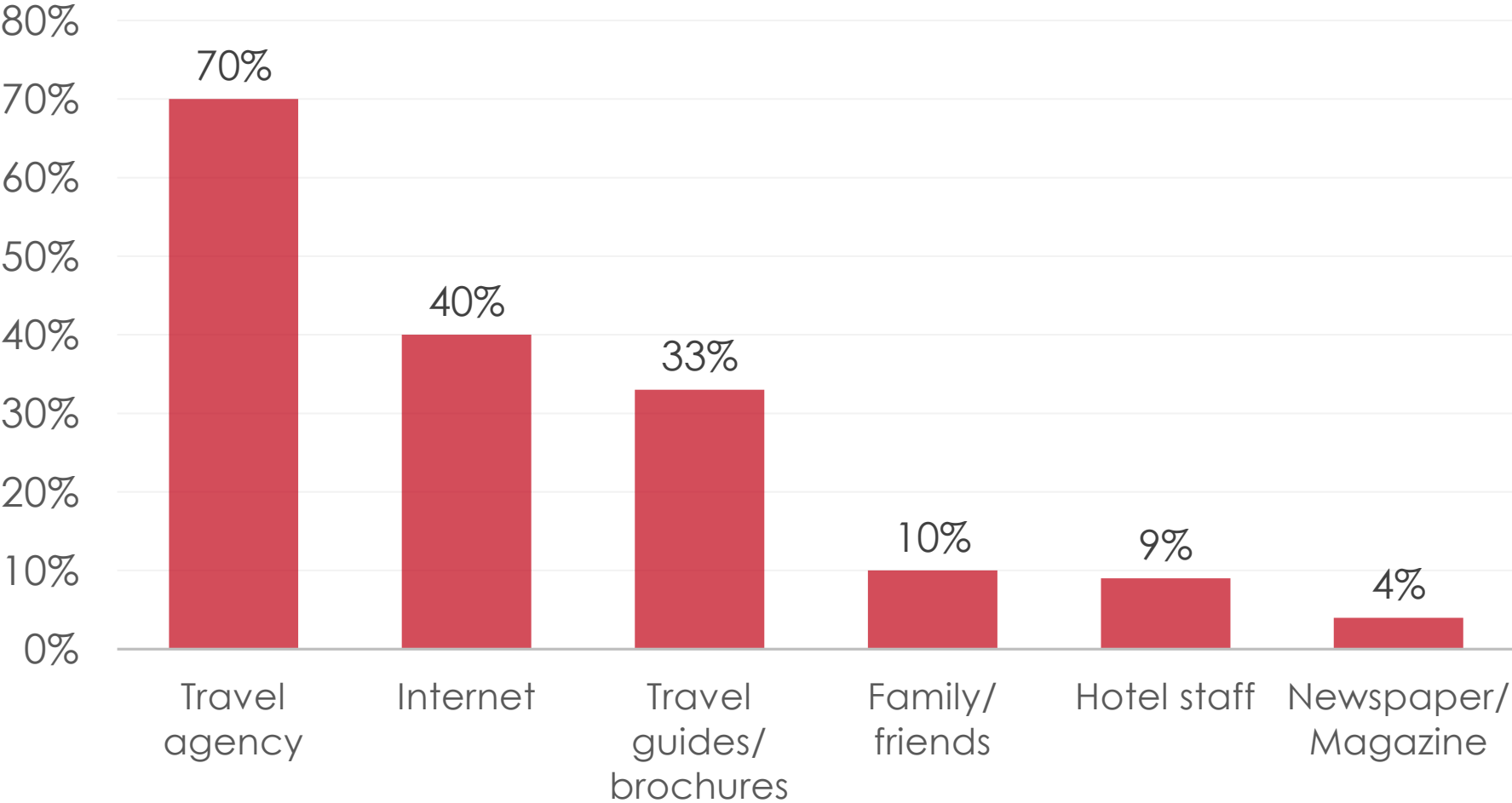
EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT



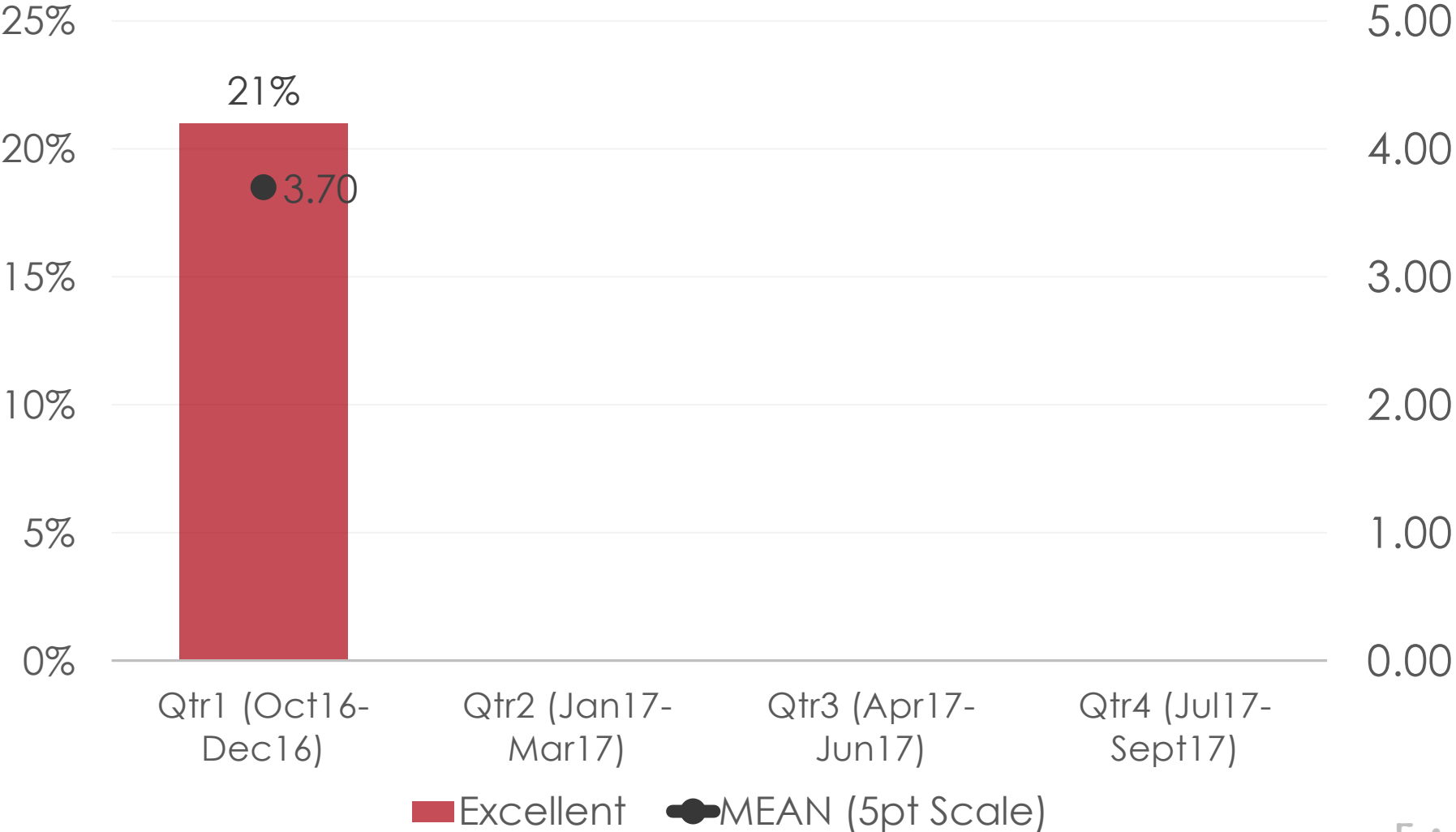
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



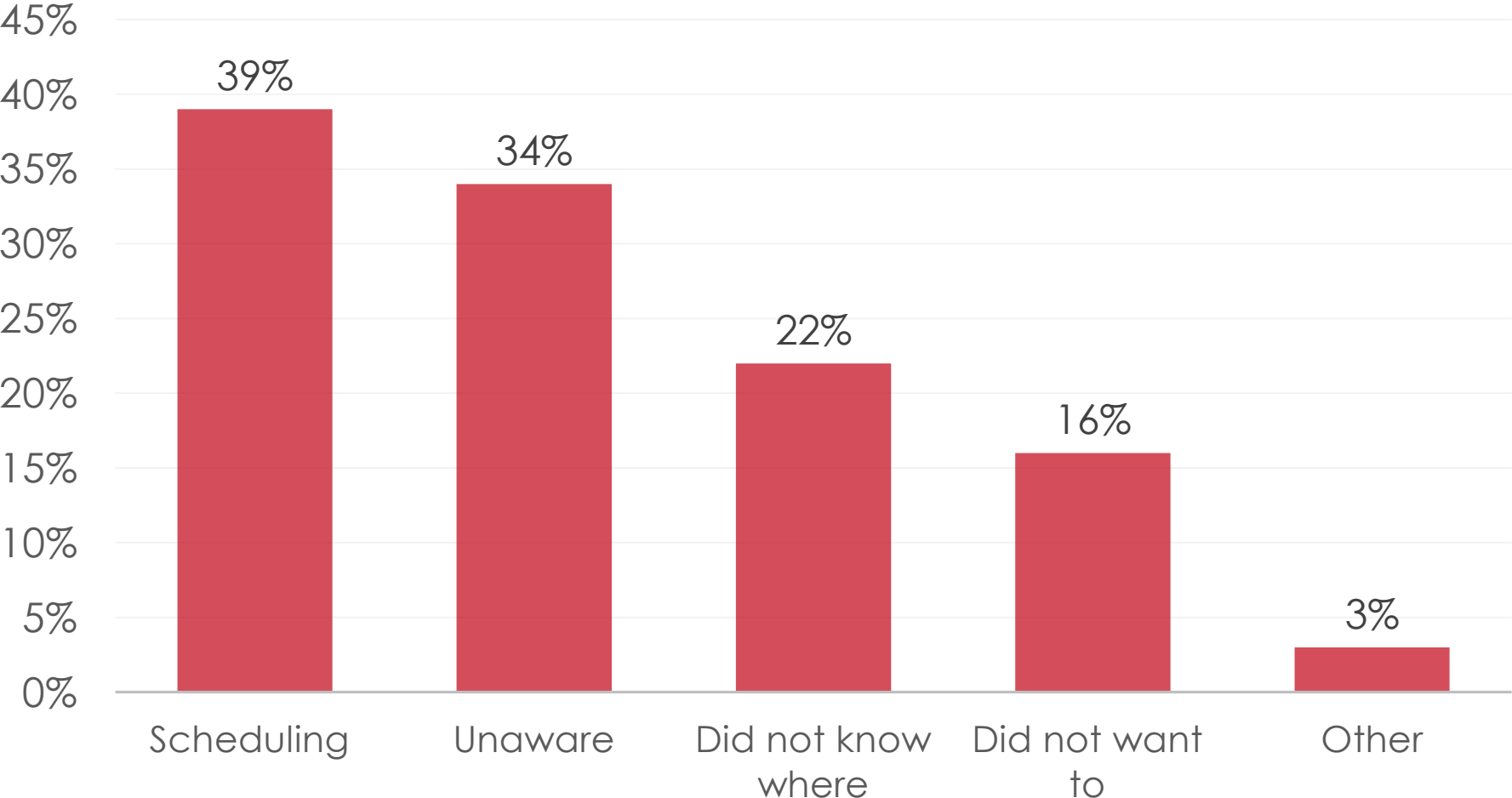
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



SATISFACTION- CULTURAL ACTIVITY/EVENTS

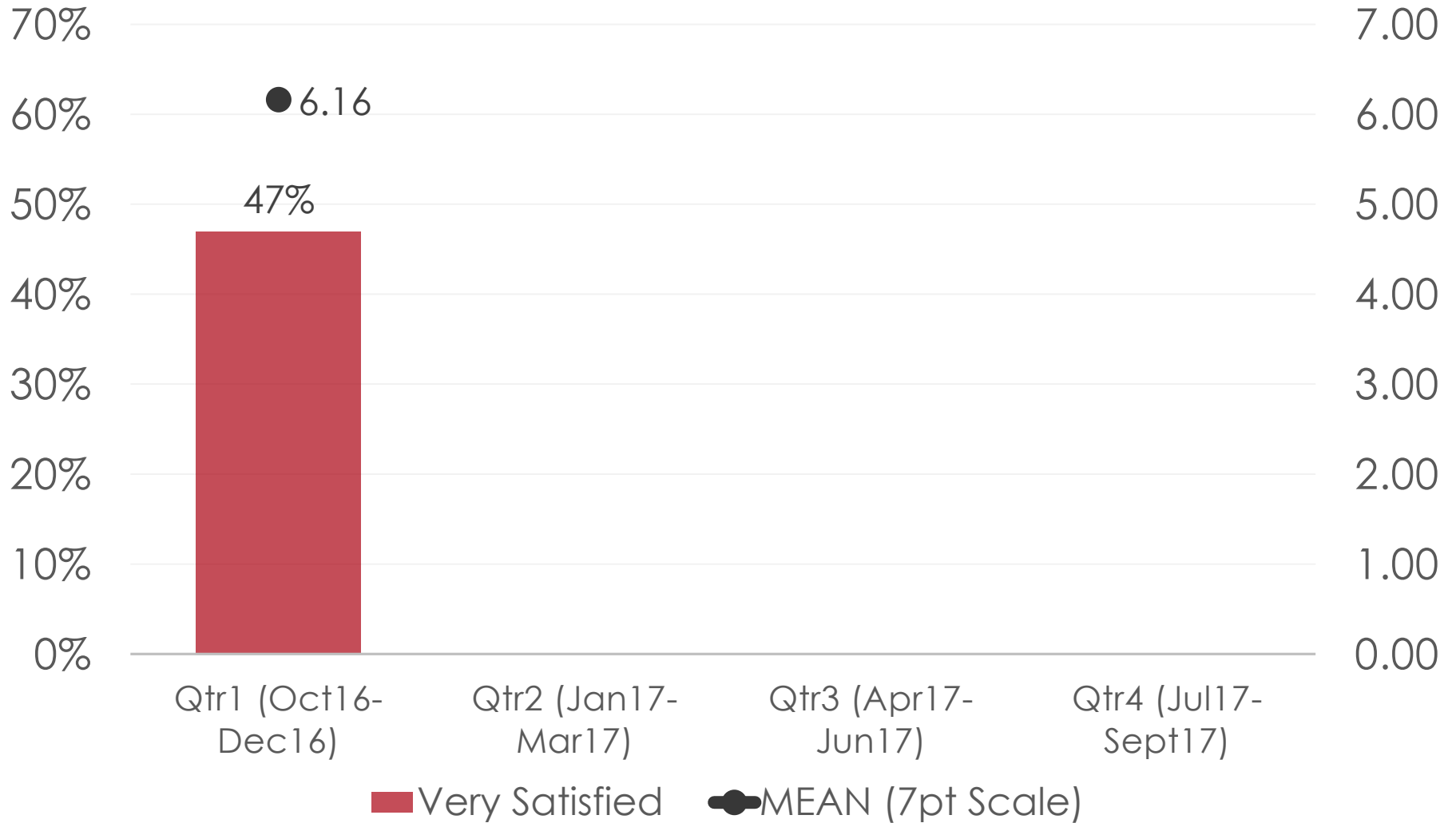


OBSTACLES- CULTURAL ACTIVITY/EVENTS

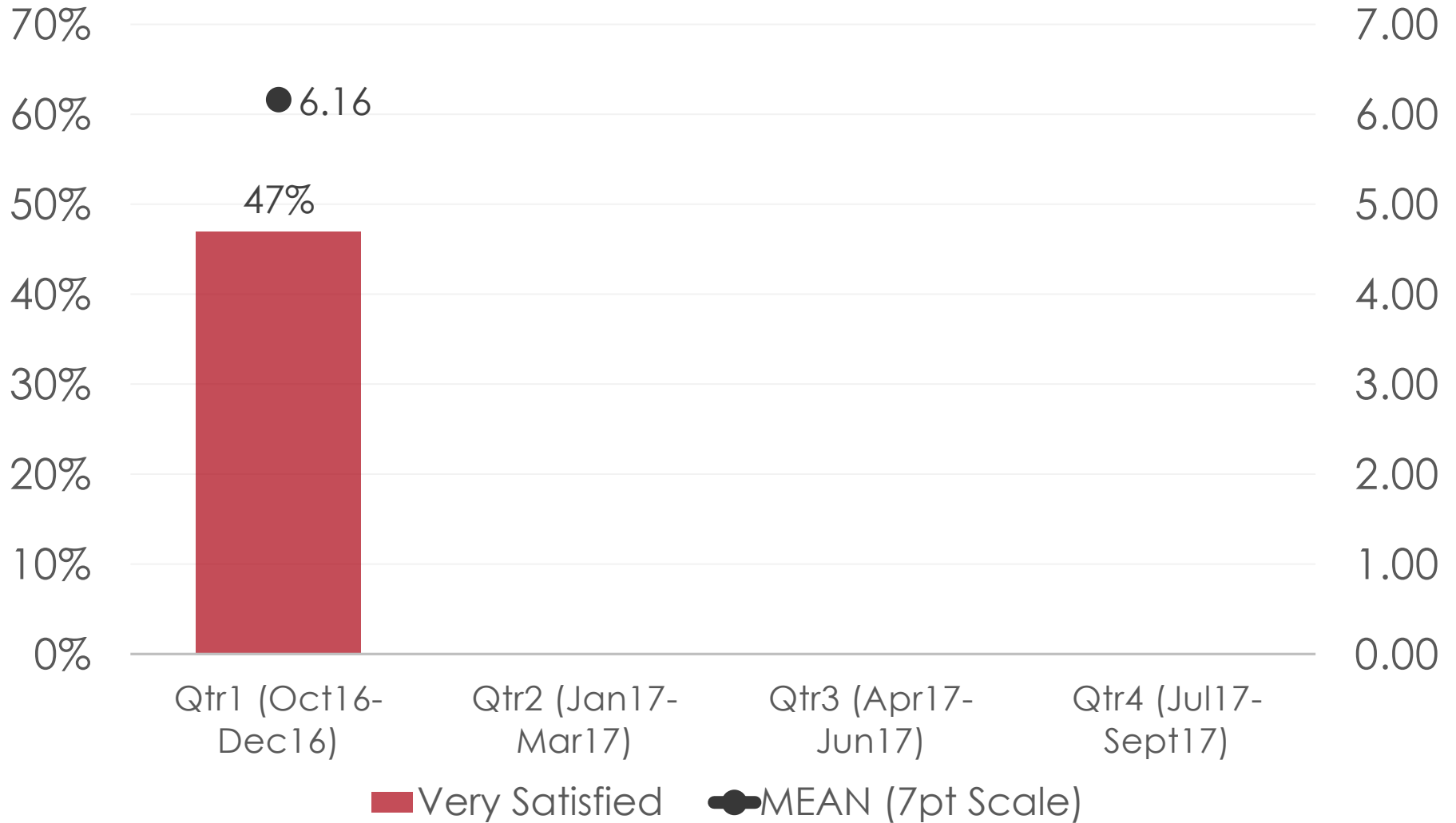


WEDDING SATISFACTION

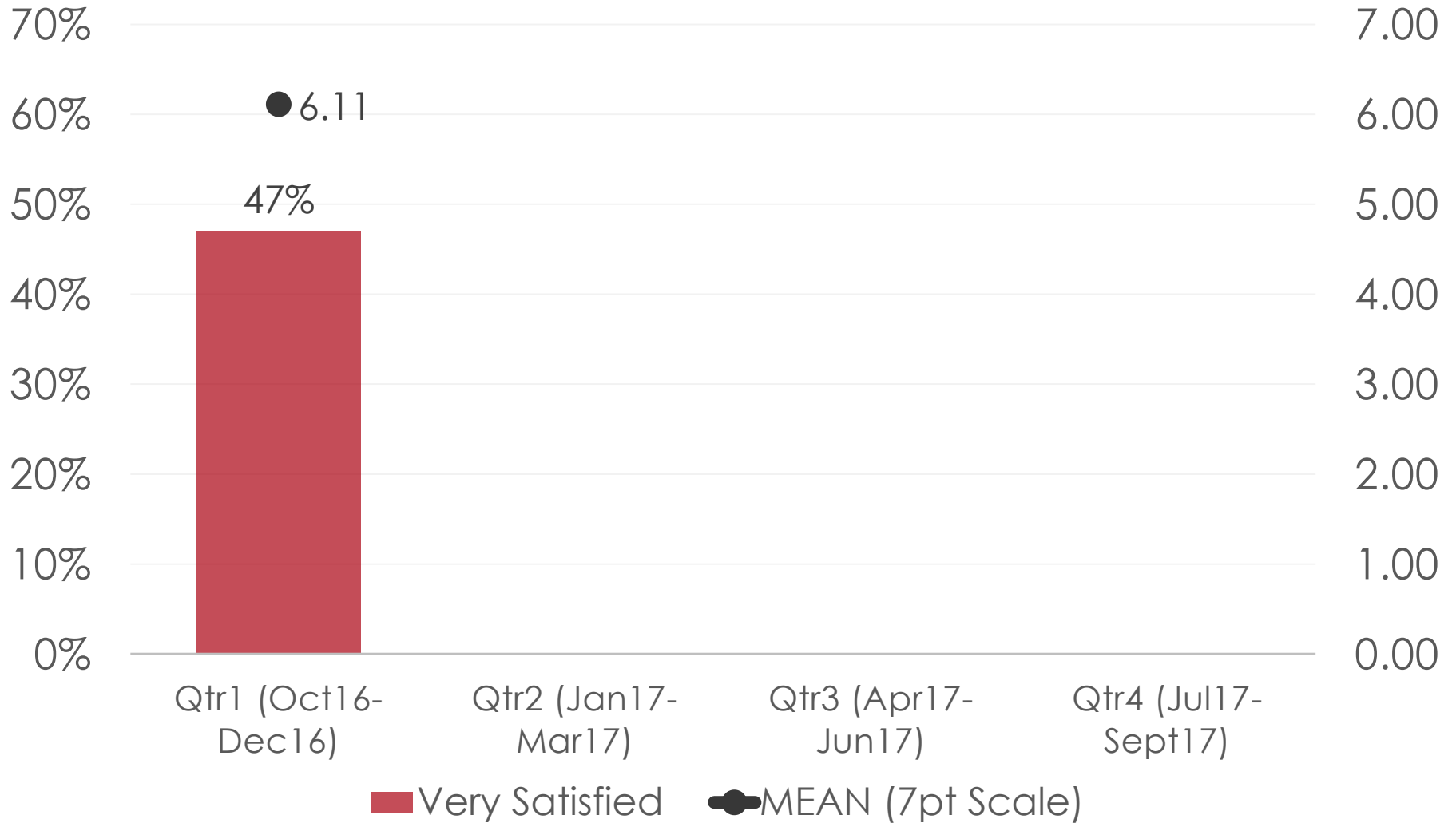
Wedding Facility



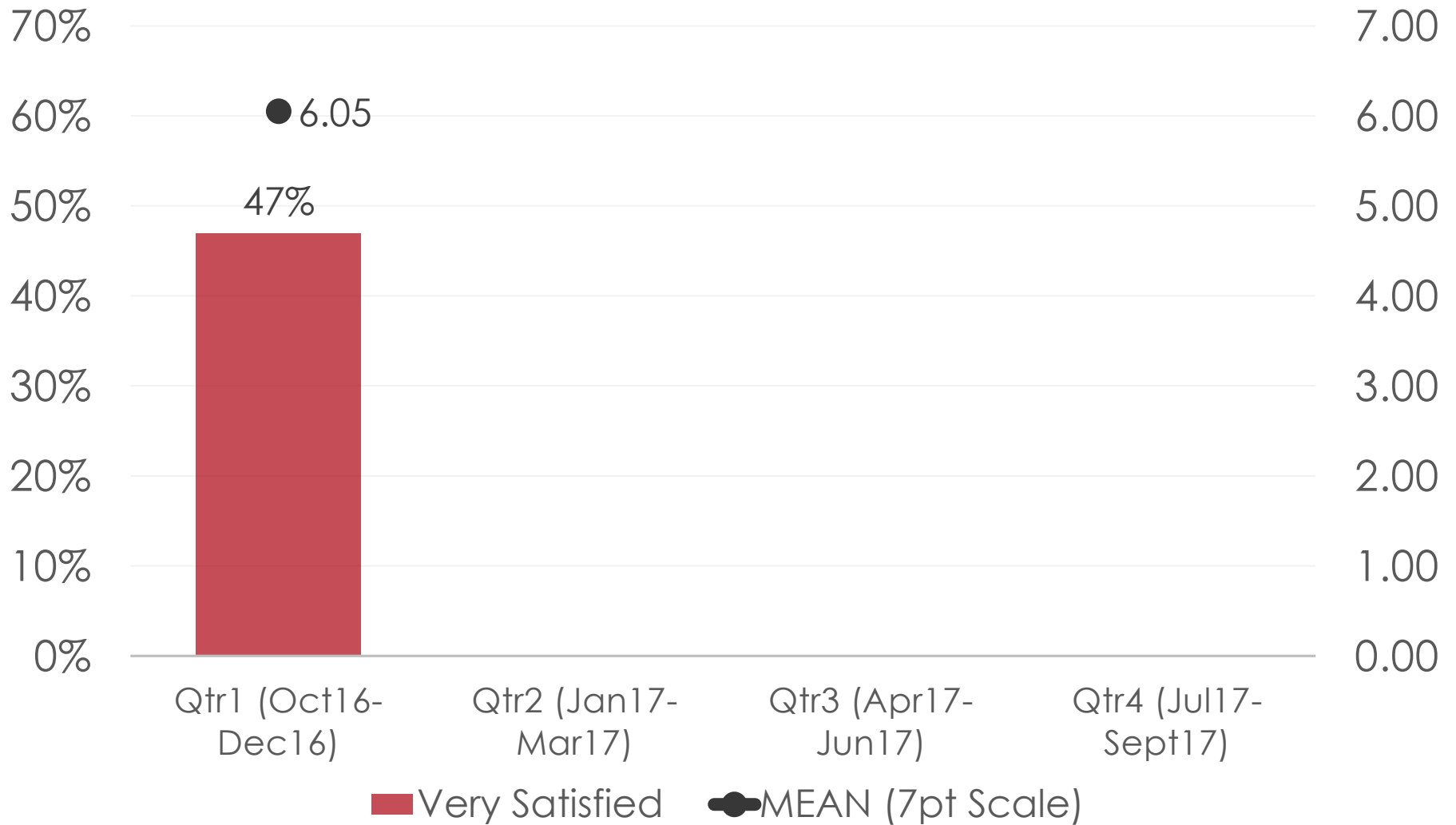
Wedding Facility Staff



Wedding Services



Wedding Package



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 ($p \leq .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Drivers- Overall Satisfaction

Drivers of Overall Satisfaction, 1st Qtr. 2017	
Drivers:	rank
Quality & Cleanliness of beaches & parks	
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	
Variety of shopping	3
Price of things on Guam	
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	
Quality of ground handler	1
Quality/cleanliness of transportation vehicles	2
% of Overall Satisfaction Accounted For	51.7%
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 1st Quarter 2017 Period. By rank order they are:
 - **Quality of ground handler,**
 - **Quality/cleanliness of transportation vehicles,**
 - **Variety of shopping.**
- With all three factors the overall r^2 is .517 meaning that **51.7% of overall satisfaction is accounted for by these factors.**

Drivers – On-Isle Expenditures

Drivers of Per Person On Island Expenditures, 1st Qtr. 2017	
Drivers:	rank
Quality & Cleanliness of beaches & parks	
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	1
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	2.4%
NOTE: Only significant drivers are included.	

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Taiwan visitors on Guam is driven by one significant factor in the 1st Quarter 2017 period. It is:
 - **Quality of shopping.**
- With this factor the overall r^2 is .024 meaning that **2.4% of per person on island expenditure is accounted for by this factor.**