

# Guam Visitors Bureau

## Taiwan Visitor Tracker Exit Profile

### FY2017 DATA AGGREGATION

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 **639** 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 **639** is +/- 3.88 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 +/- 3.88 percentage points.

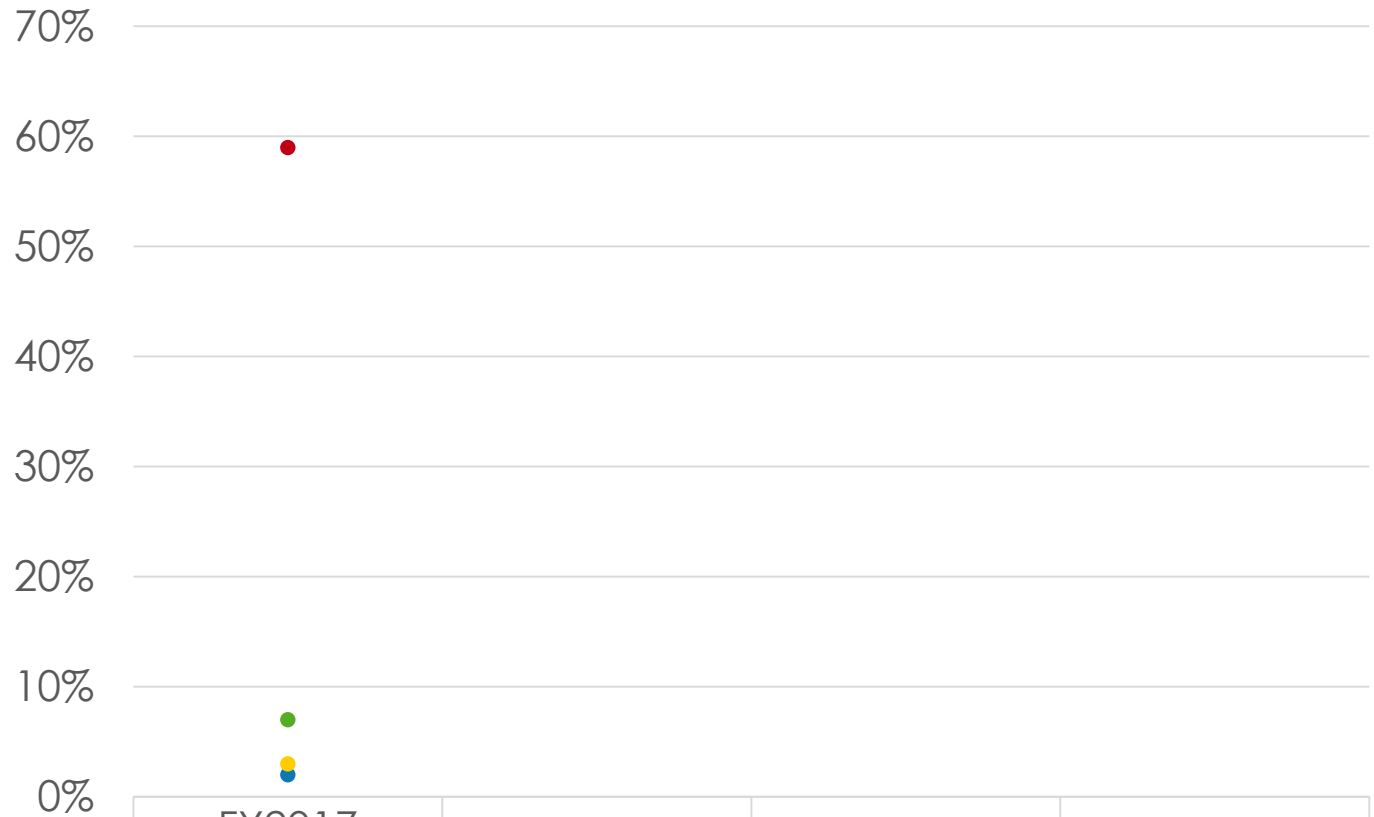
# Objectives

- 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 Segments - Taiwan

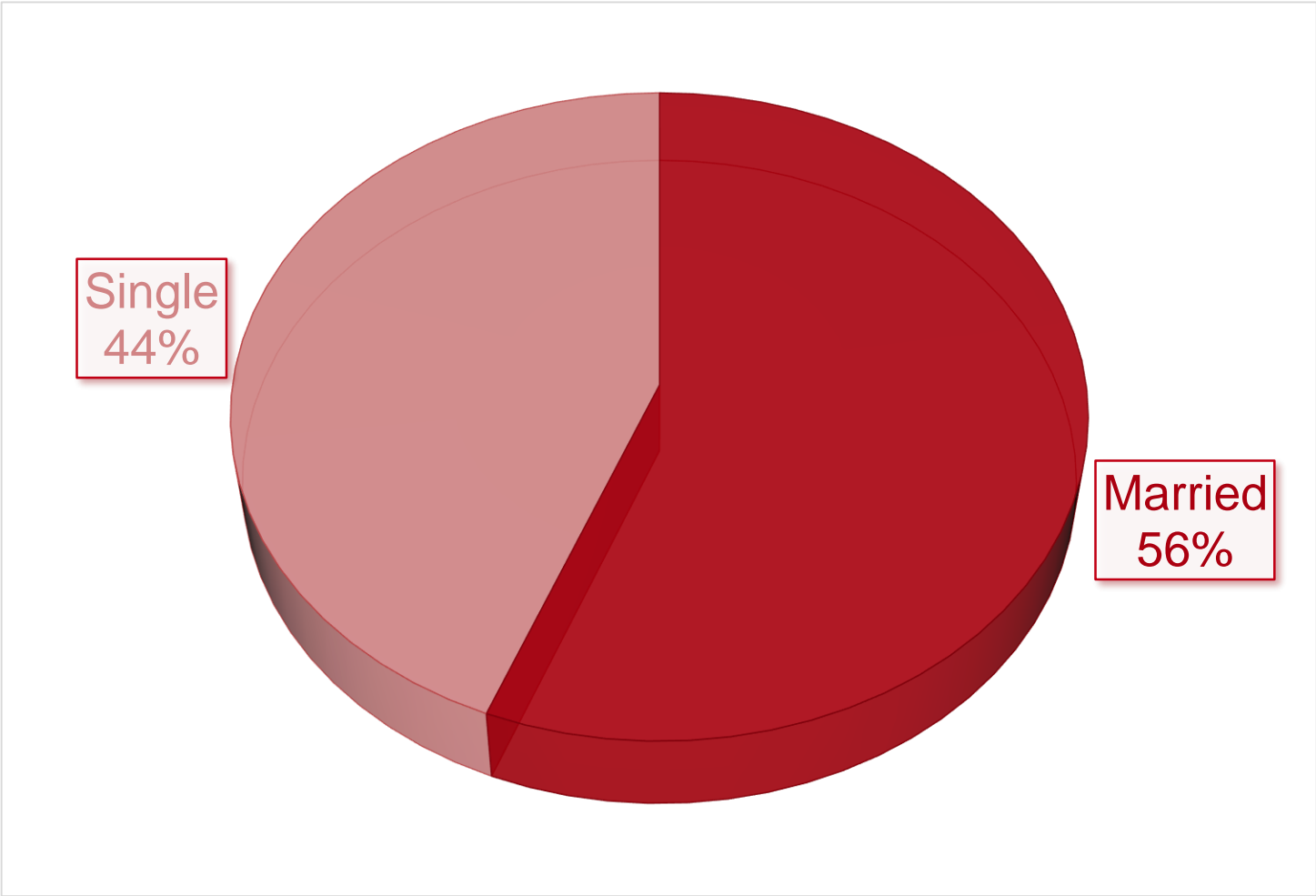


	FY2017			
MICE	2%			
Sports/ Adventure	59%			
Honeymoon	7%			
Wedding	3%			

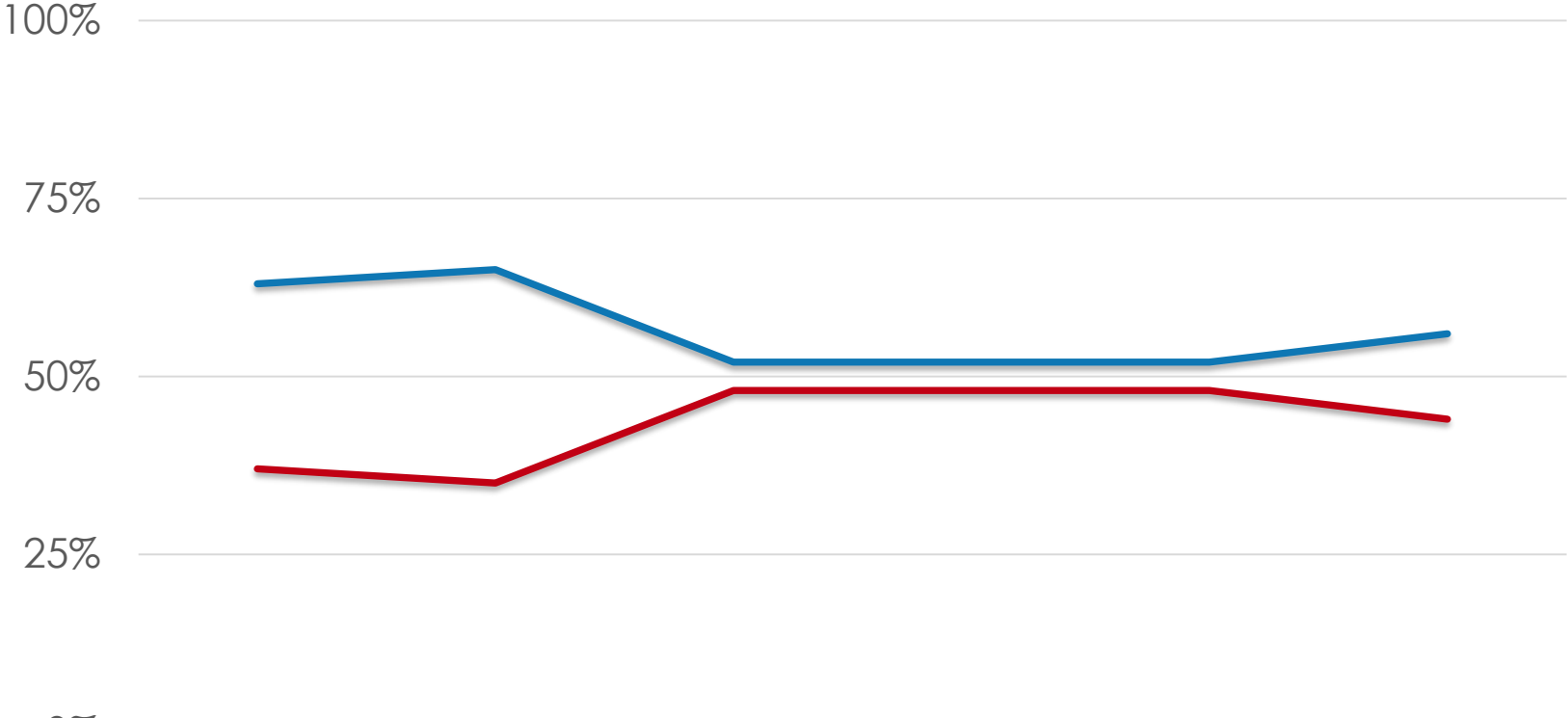
# SECTION 1

# PROFILE OF RESPONDENTS

# Marital Status



# Marital status – Tracking

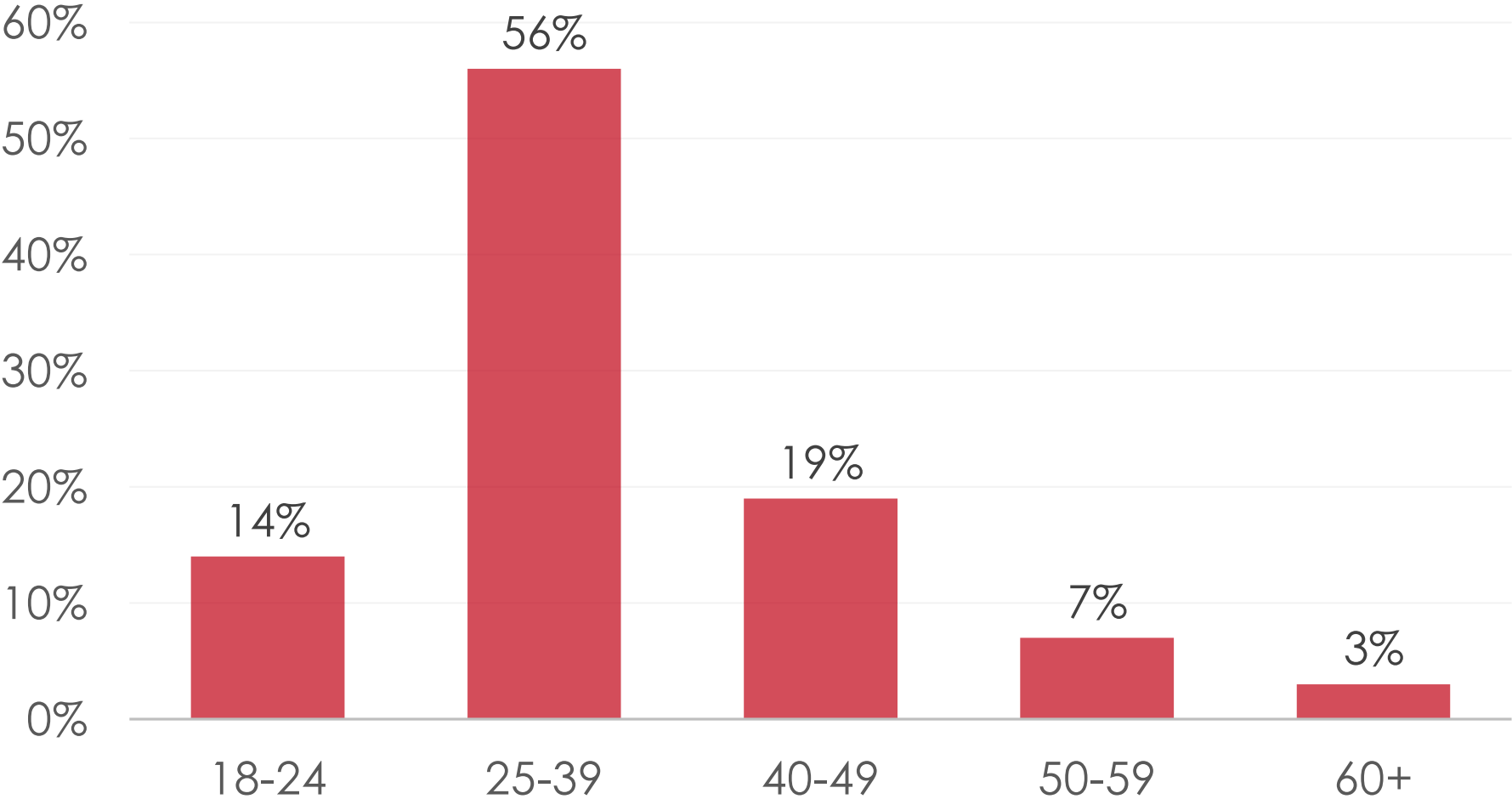


	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
— Married	63%	65%	52%	52%	52%	56%
— Single	37%	35%	48%	48%	48%	44%

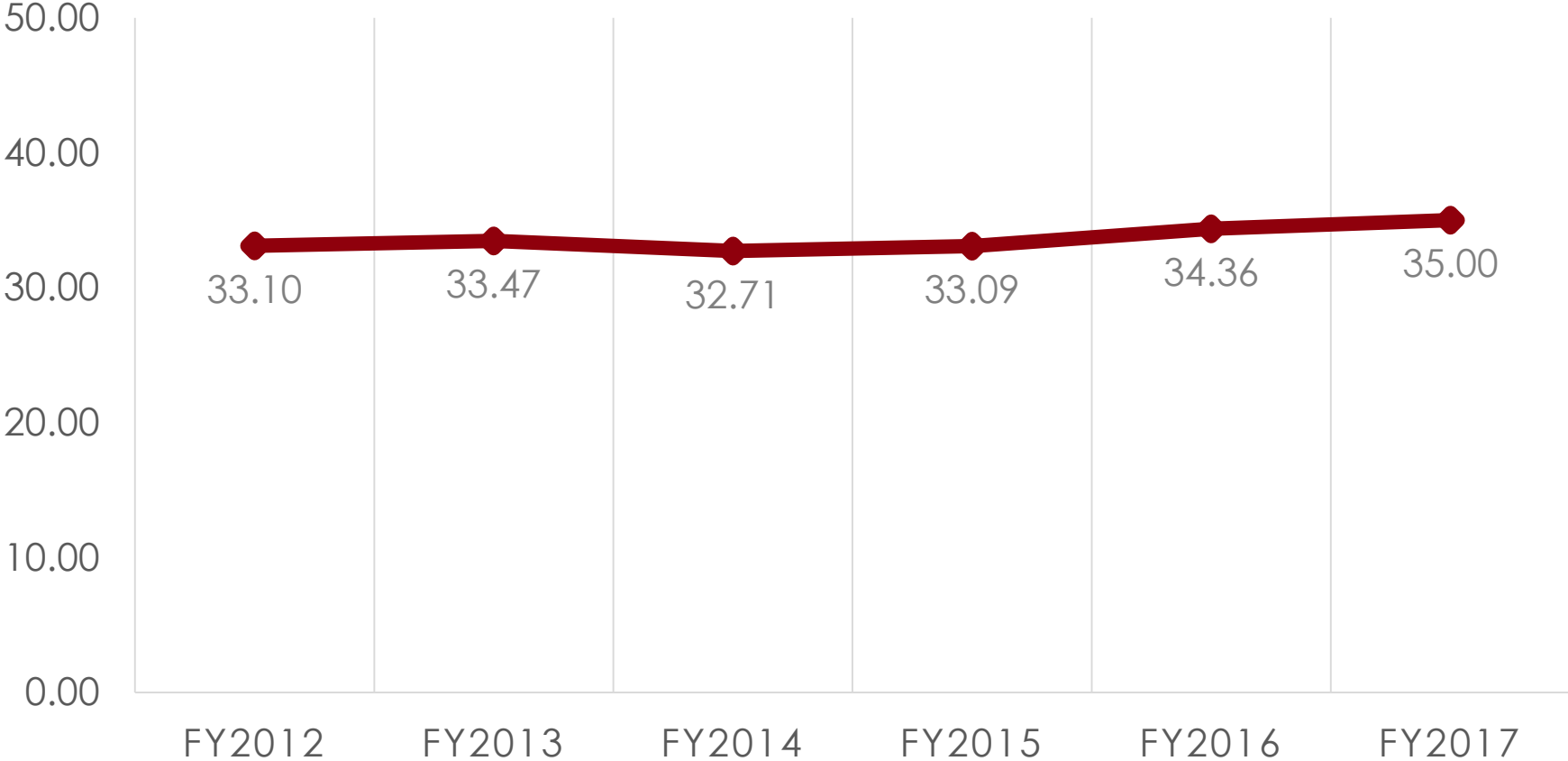


# Age

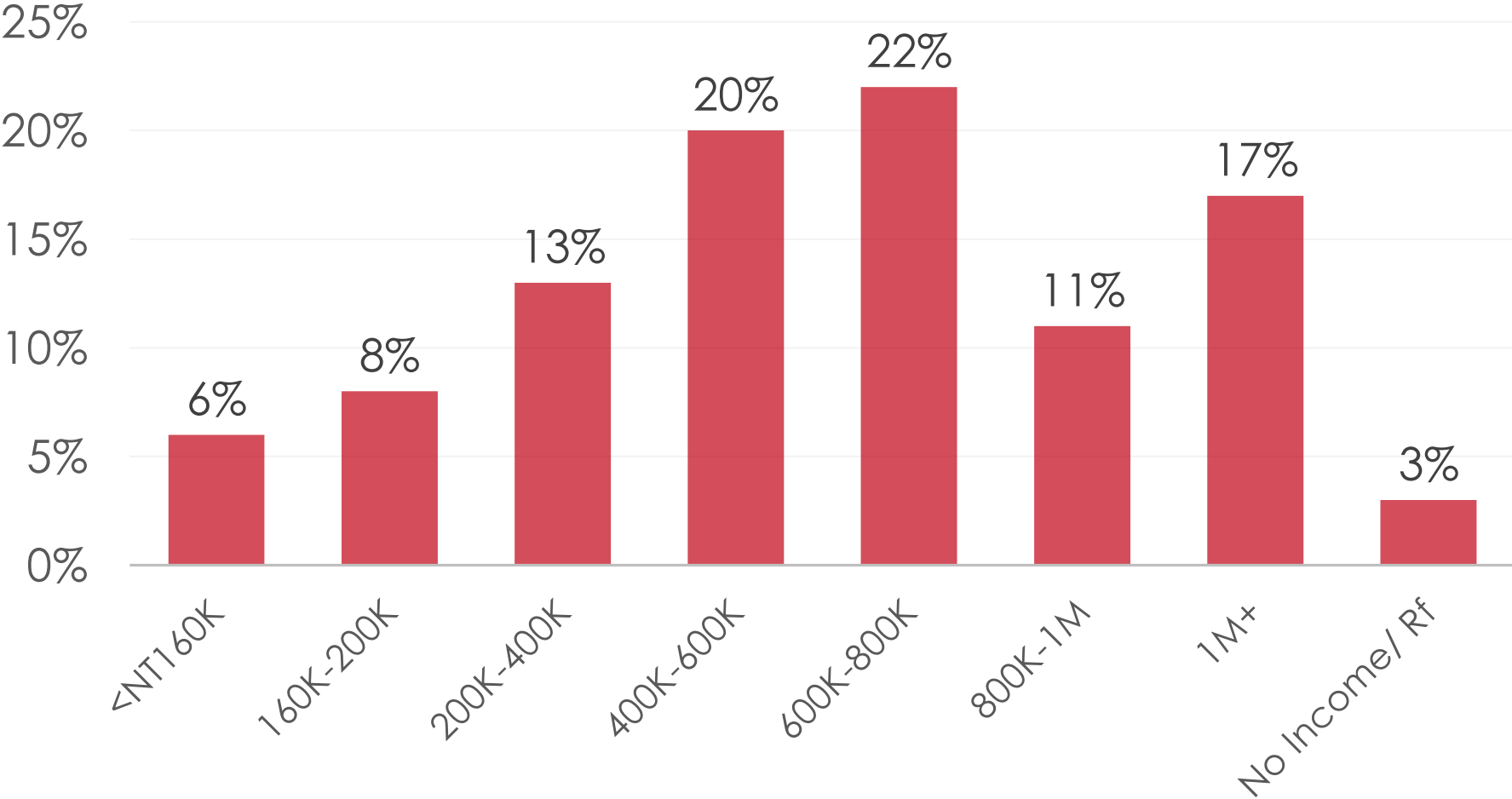
MEAN = 35.00  
MEDIAN = 33



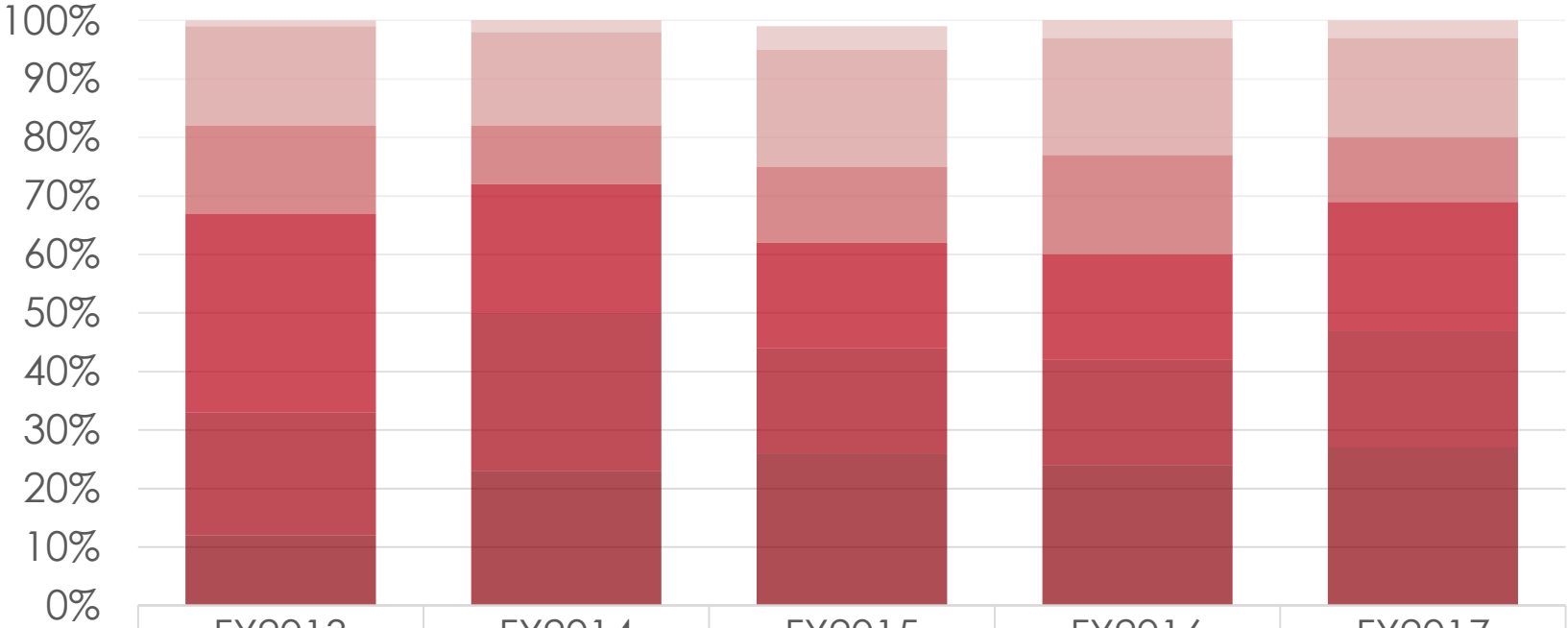
# Age – Tracking



# Annual Household Income

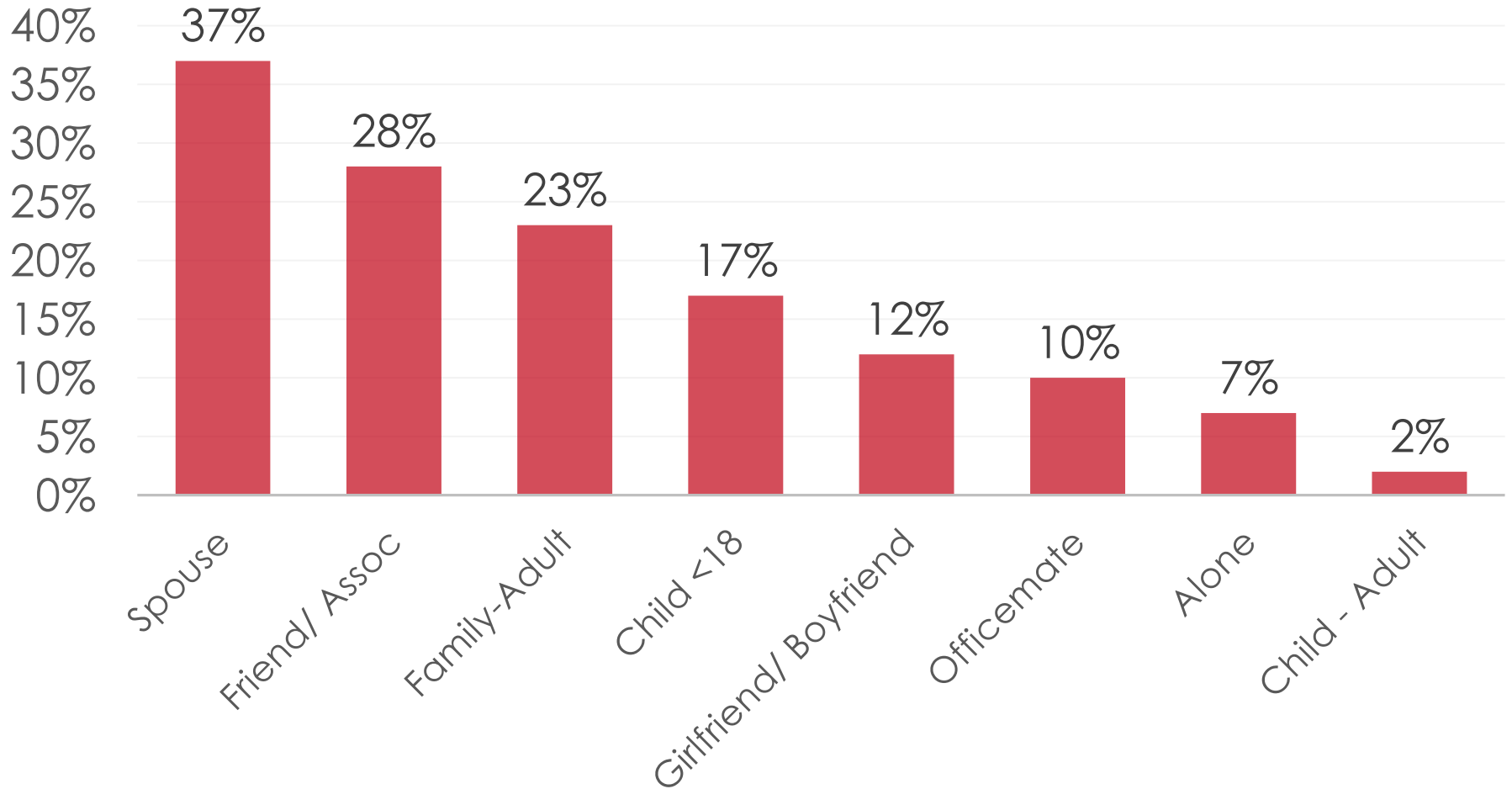


# Annual Household Income - Tracking

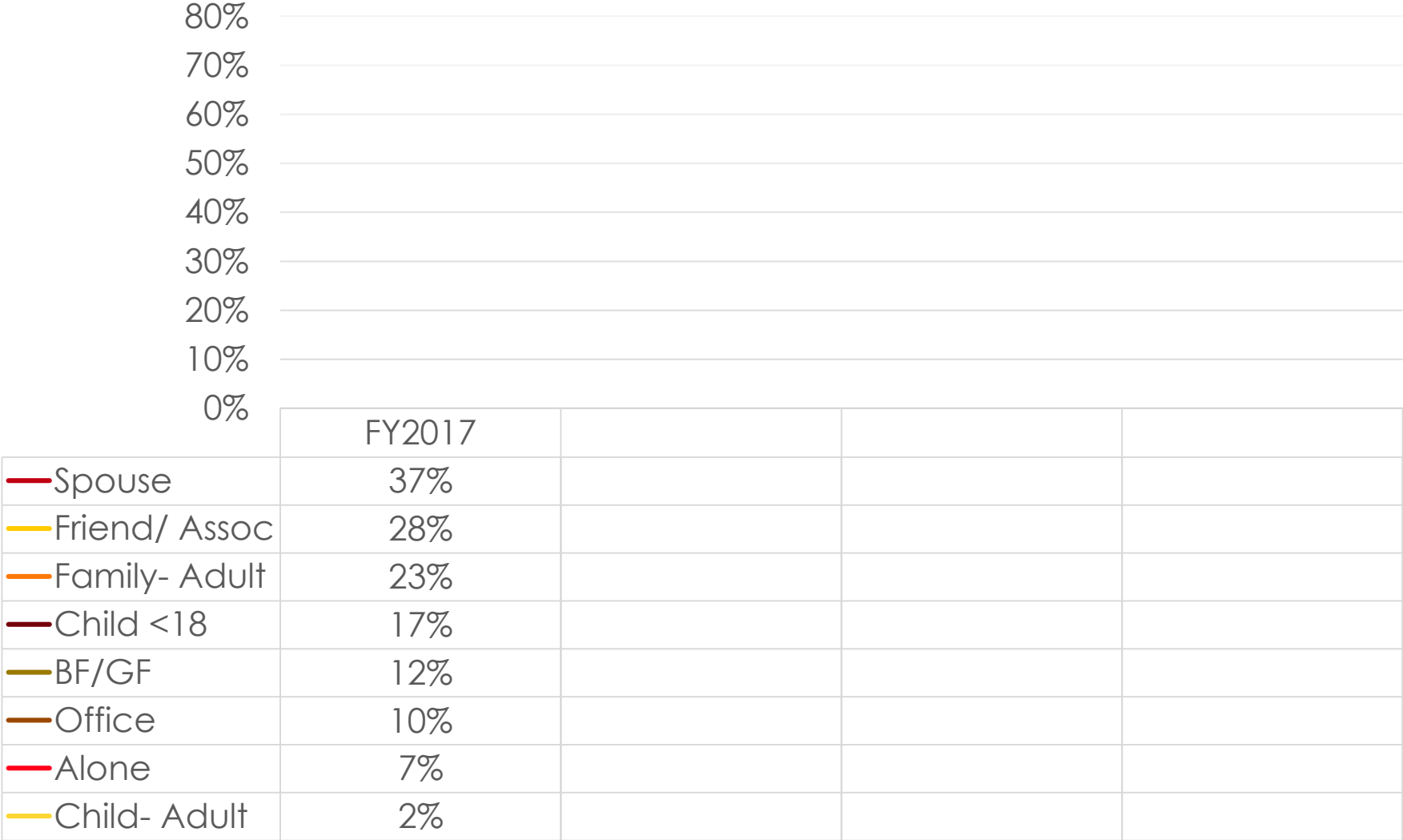


	FY2013	FY2014	FY2015	FY2016	FY2017
Rf	1%	3%	4%	4%	3%
1.0M+	17%	16%	20%	20%	17%
800K-1.0M	15%	10%	13%	17%	11%
600K-800	34%	22%	18%	18%	22%
400K-600	21%	27%	18%	18%	20%
<400K	12%	23%	26%	24%	27%

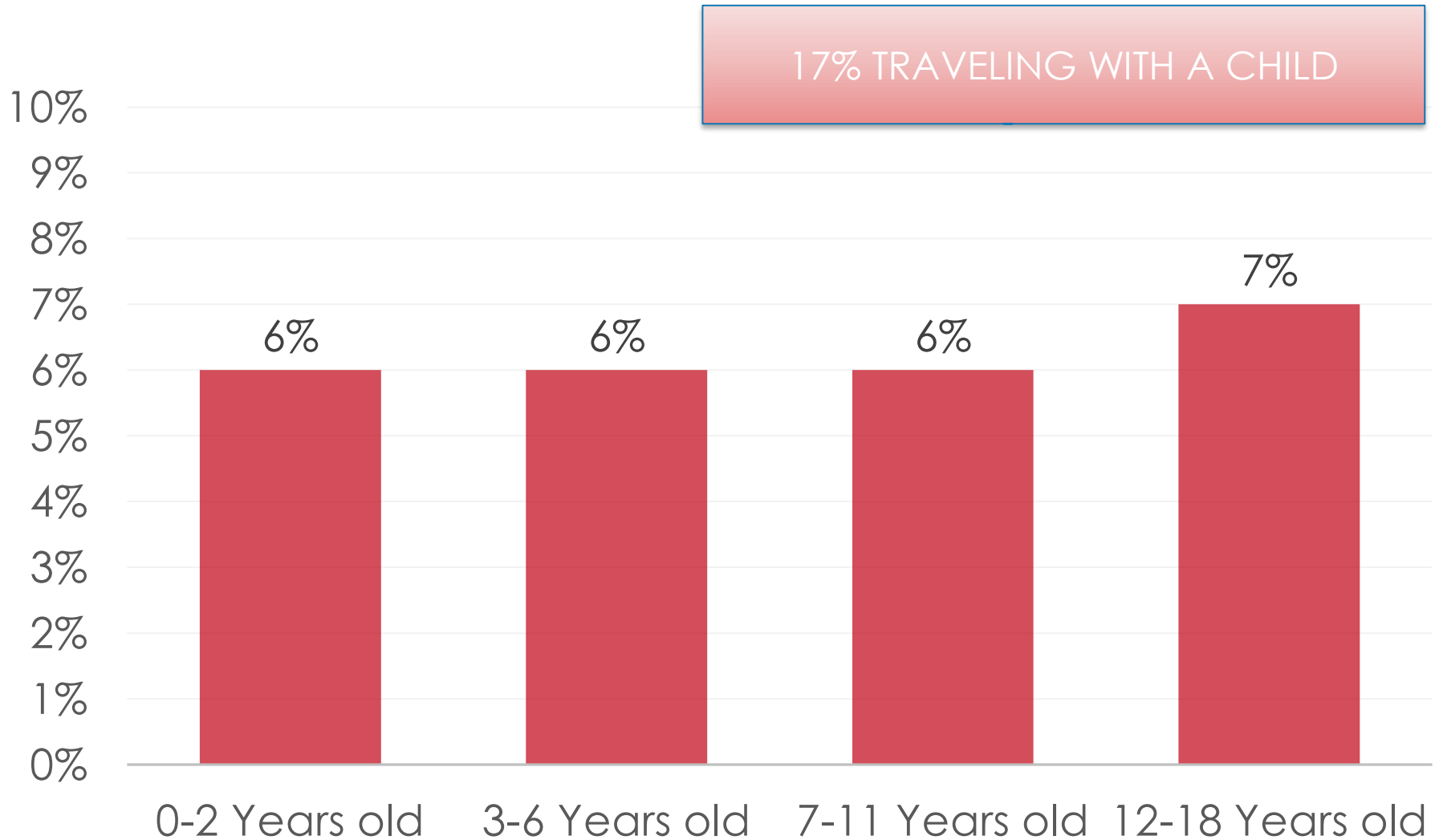
# Travel Party



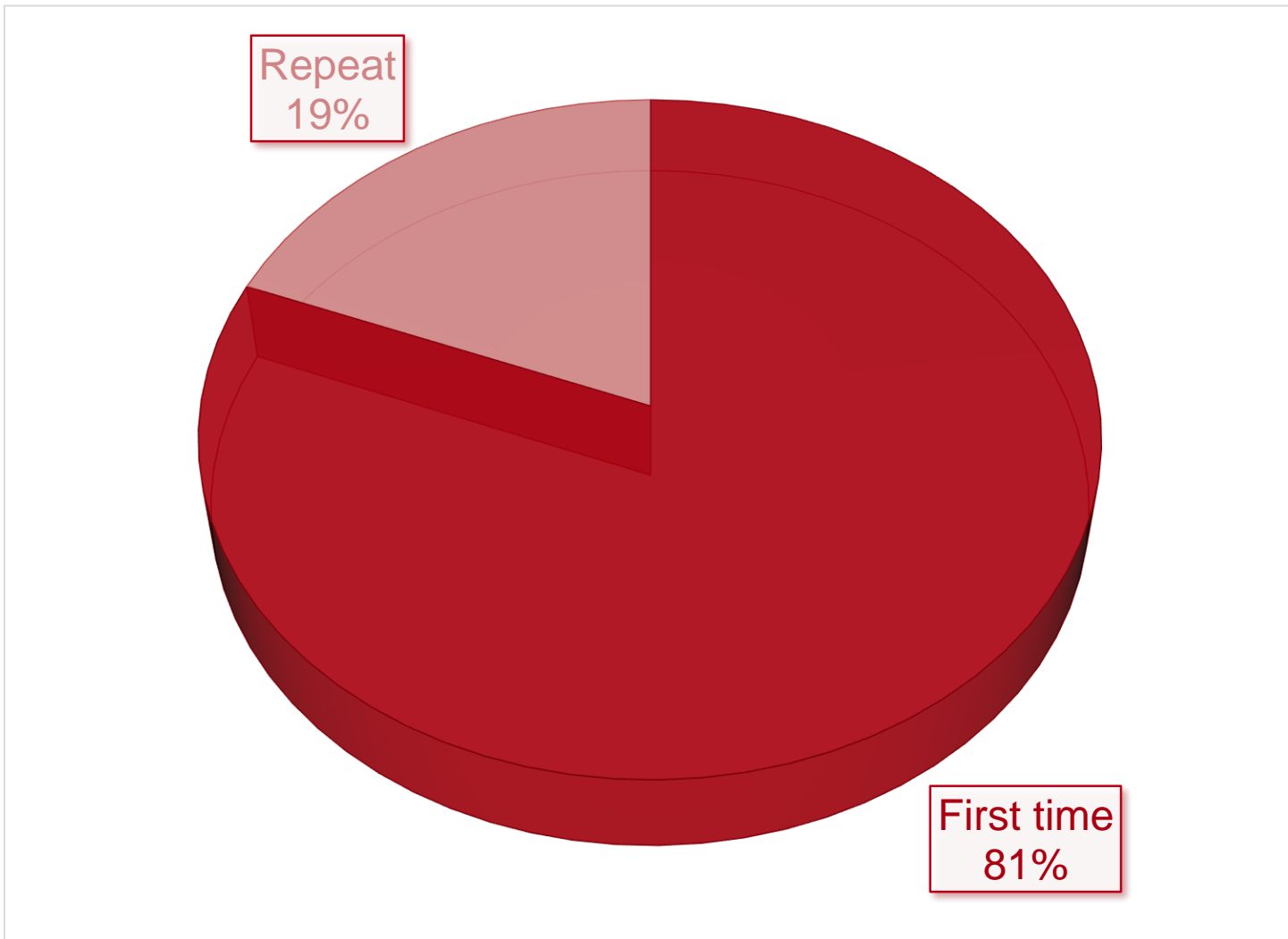
# Travel Party



# Travel Party - Children

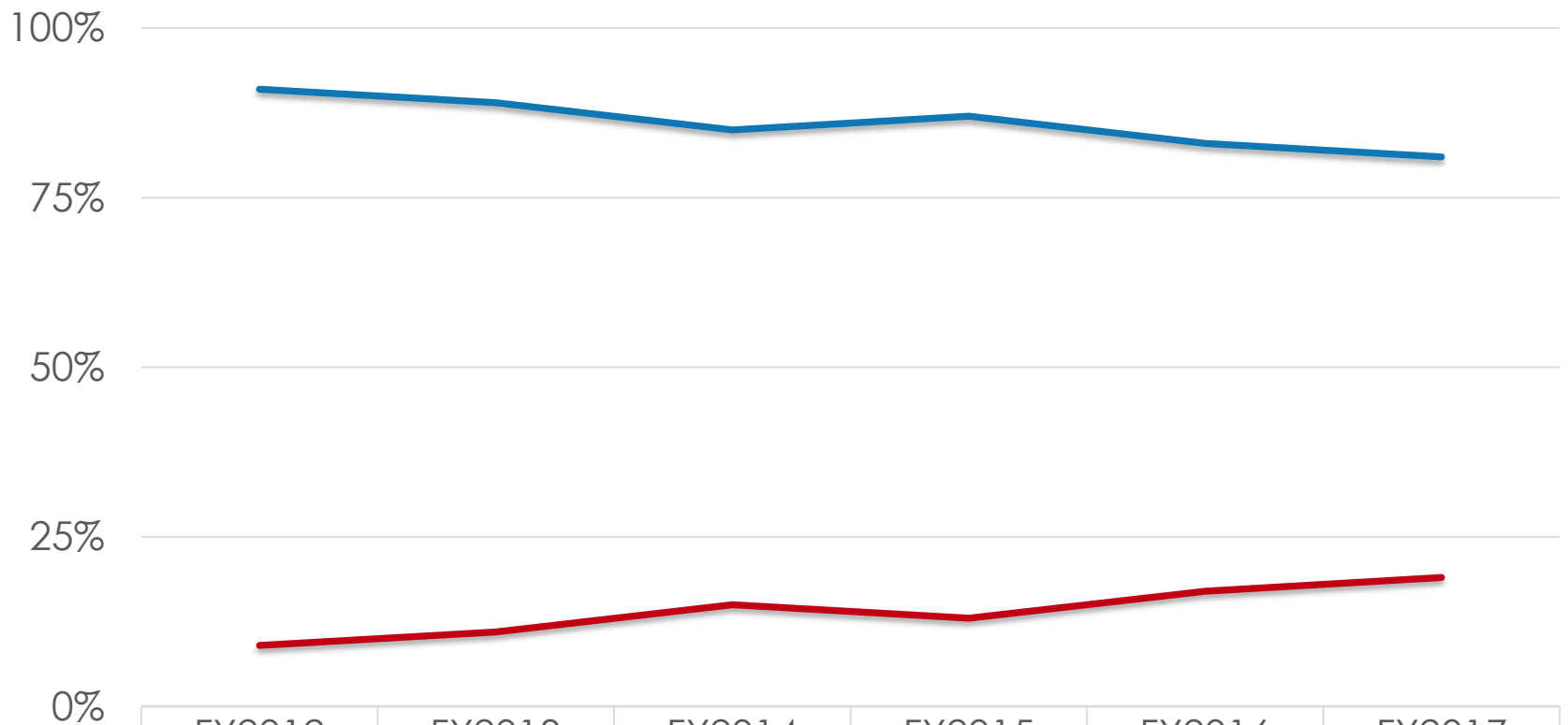


# Trips to Guam





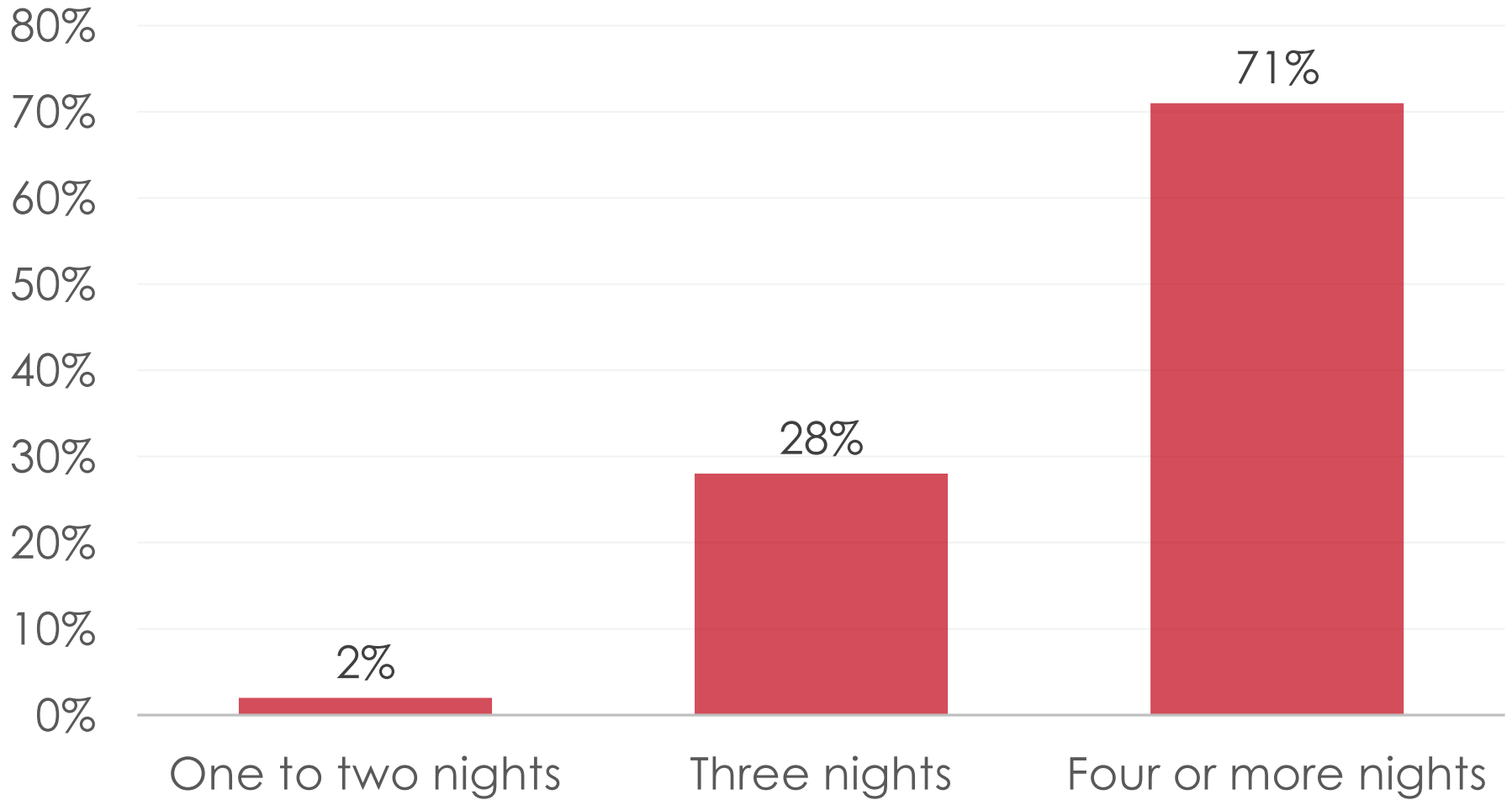
# Trips to Guam – Tracking



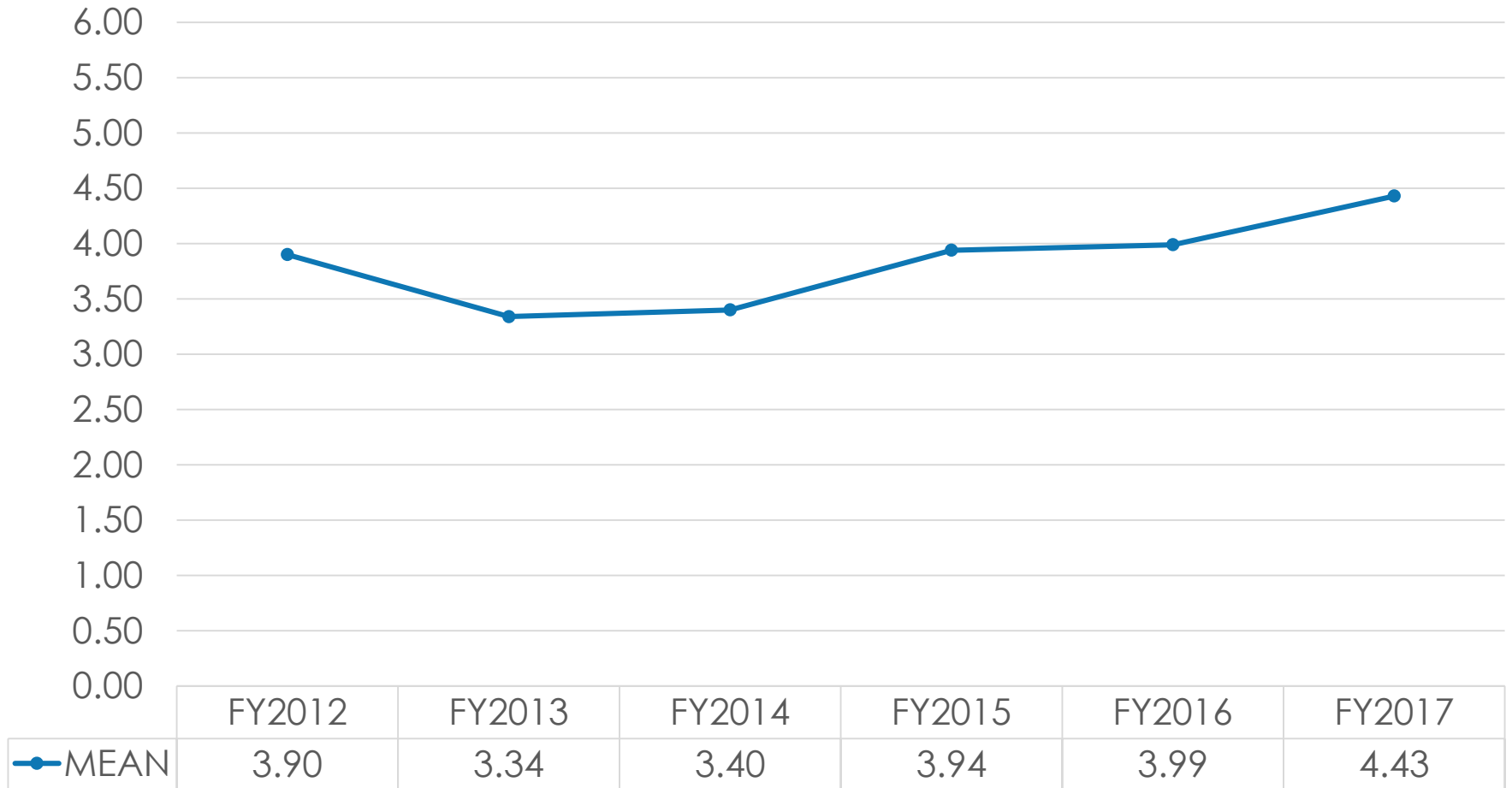
	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
Repeat	91%	89%	85%	87%	83%	81%
1st Time	9%	11%	15%	13%	17%	19%

# Length of Stay

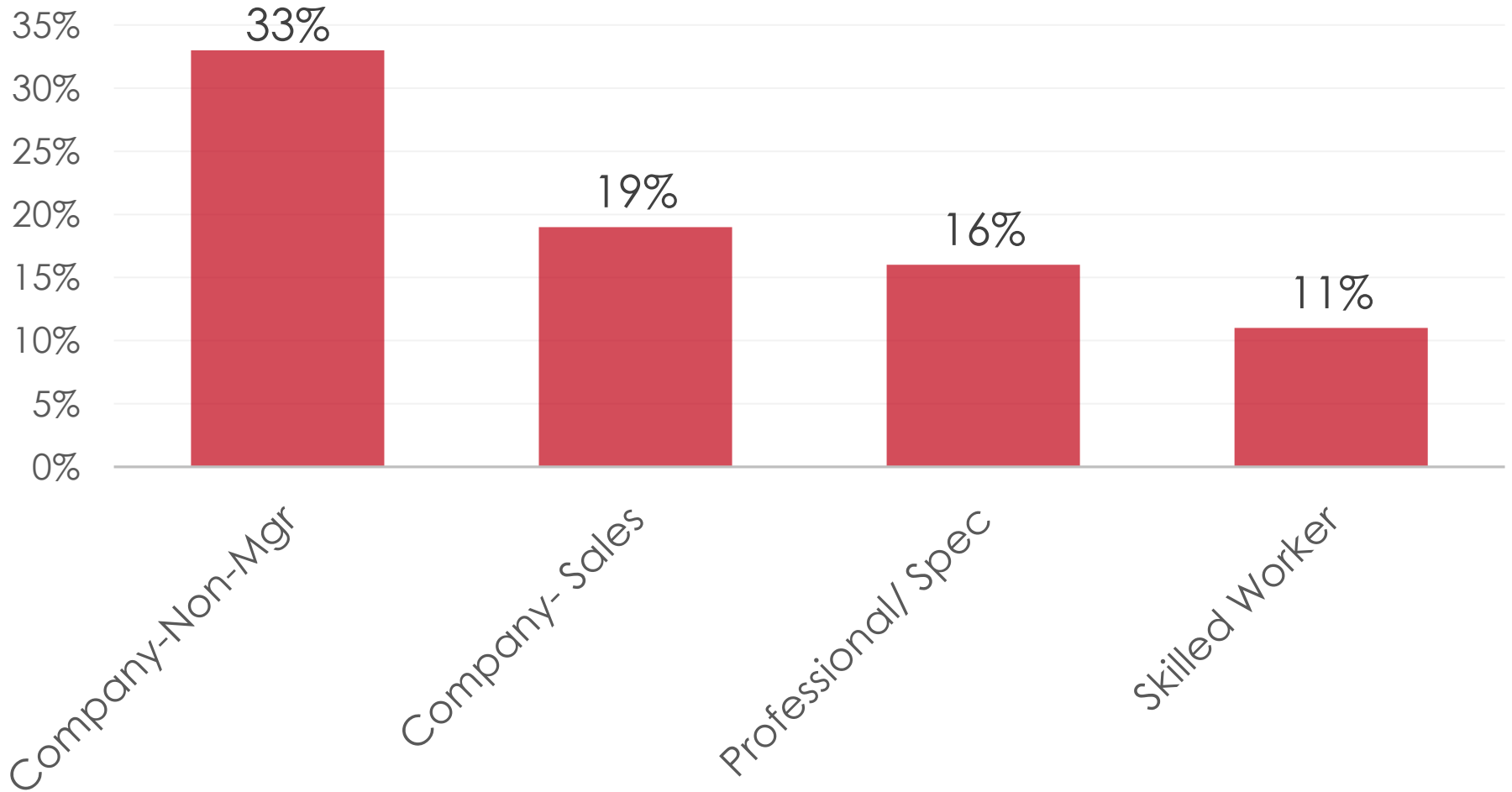
MEAN NUMBER OF NIGHTS = 4.43  
MEDIAN NUMBER OF NIGHTS = 4



# Length of Stay – Tracking



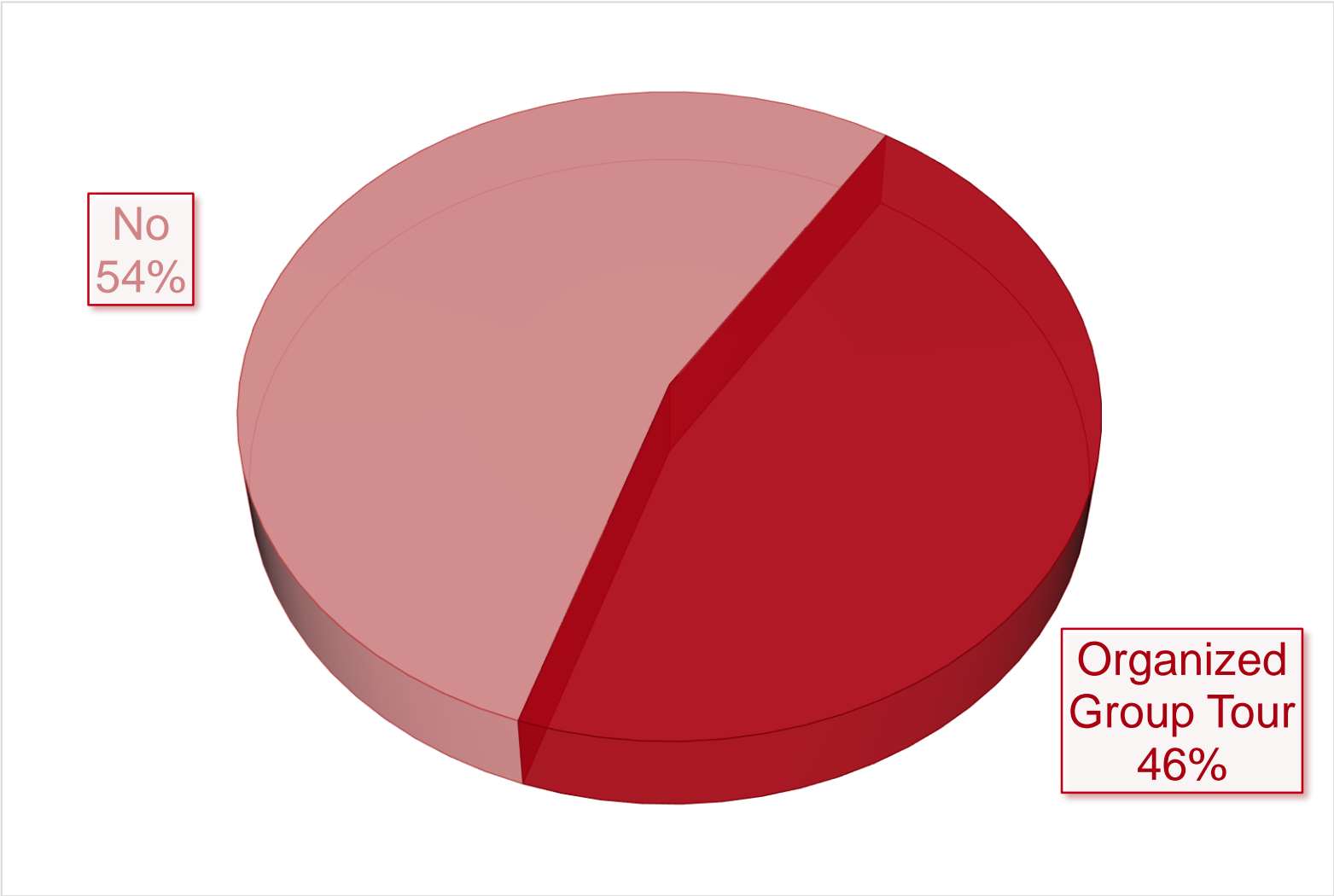
# Occupation – Top Responses (10%+)



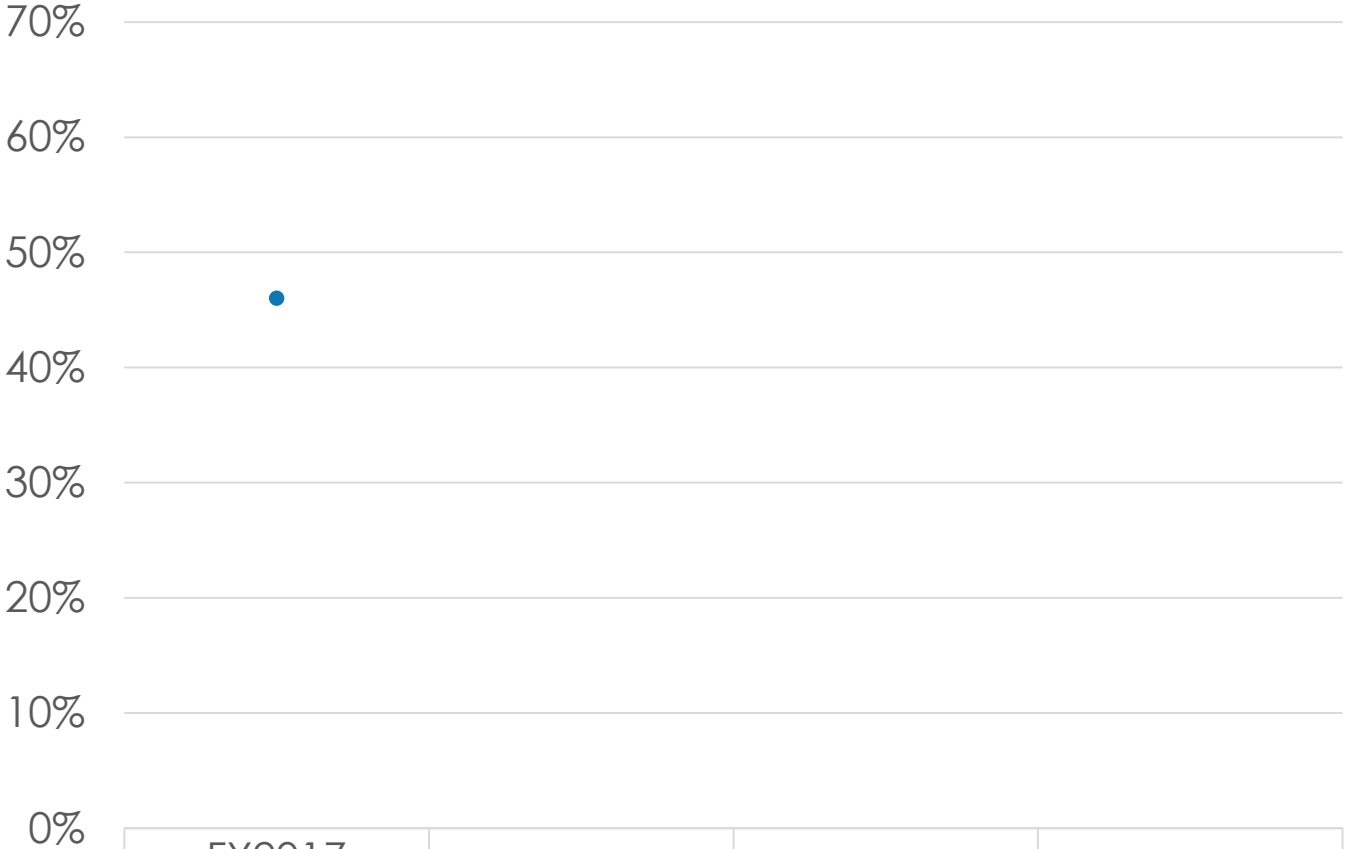
# SECTION 2

# TRAVEL PLANNING

# Organized Group Tour



# Organized Group Tour

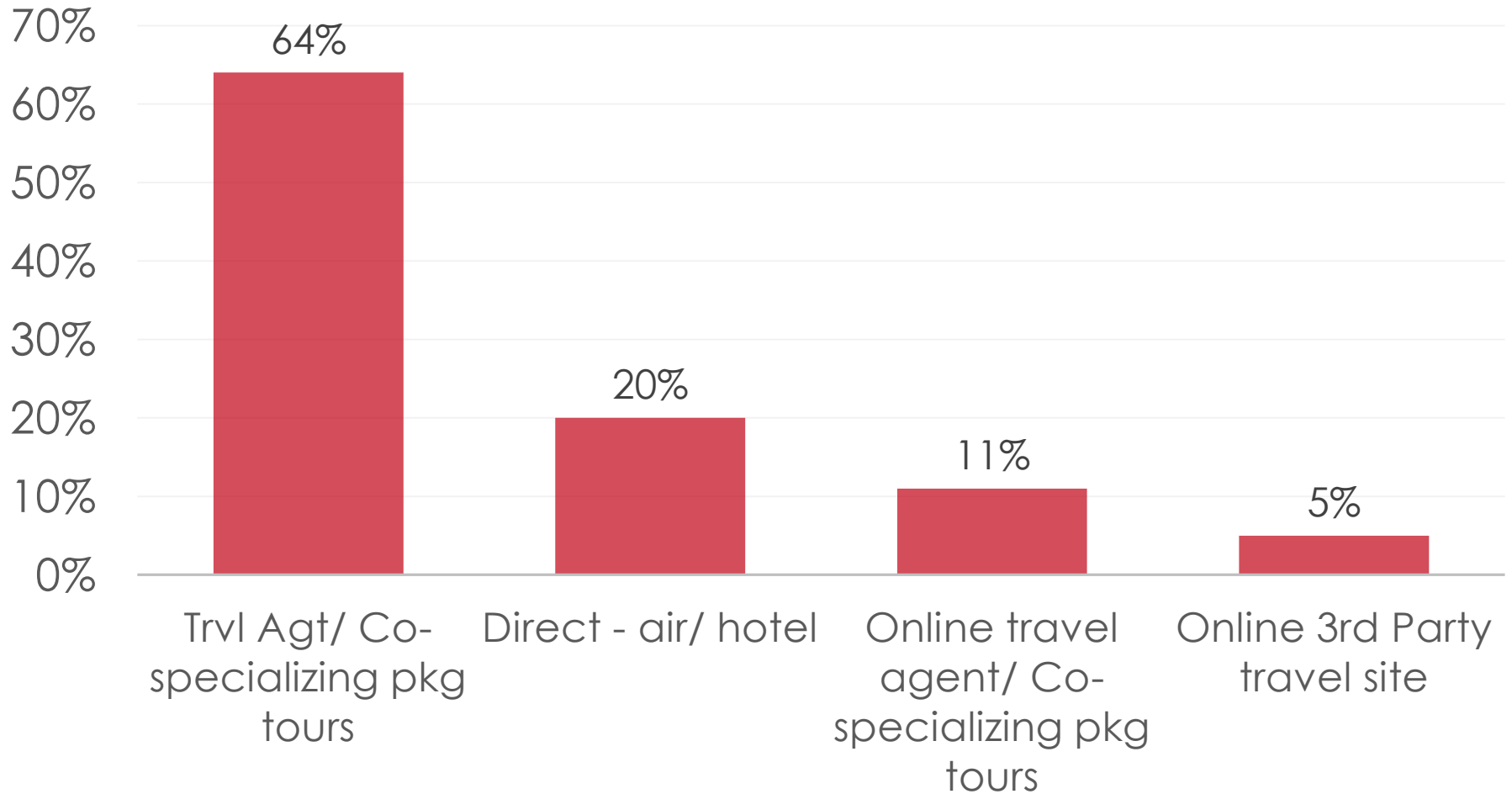


Organized Group Tour

FY2017

46%

# TRAVEL ARRANGEMENT- SOURCES



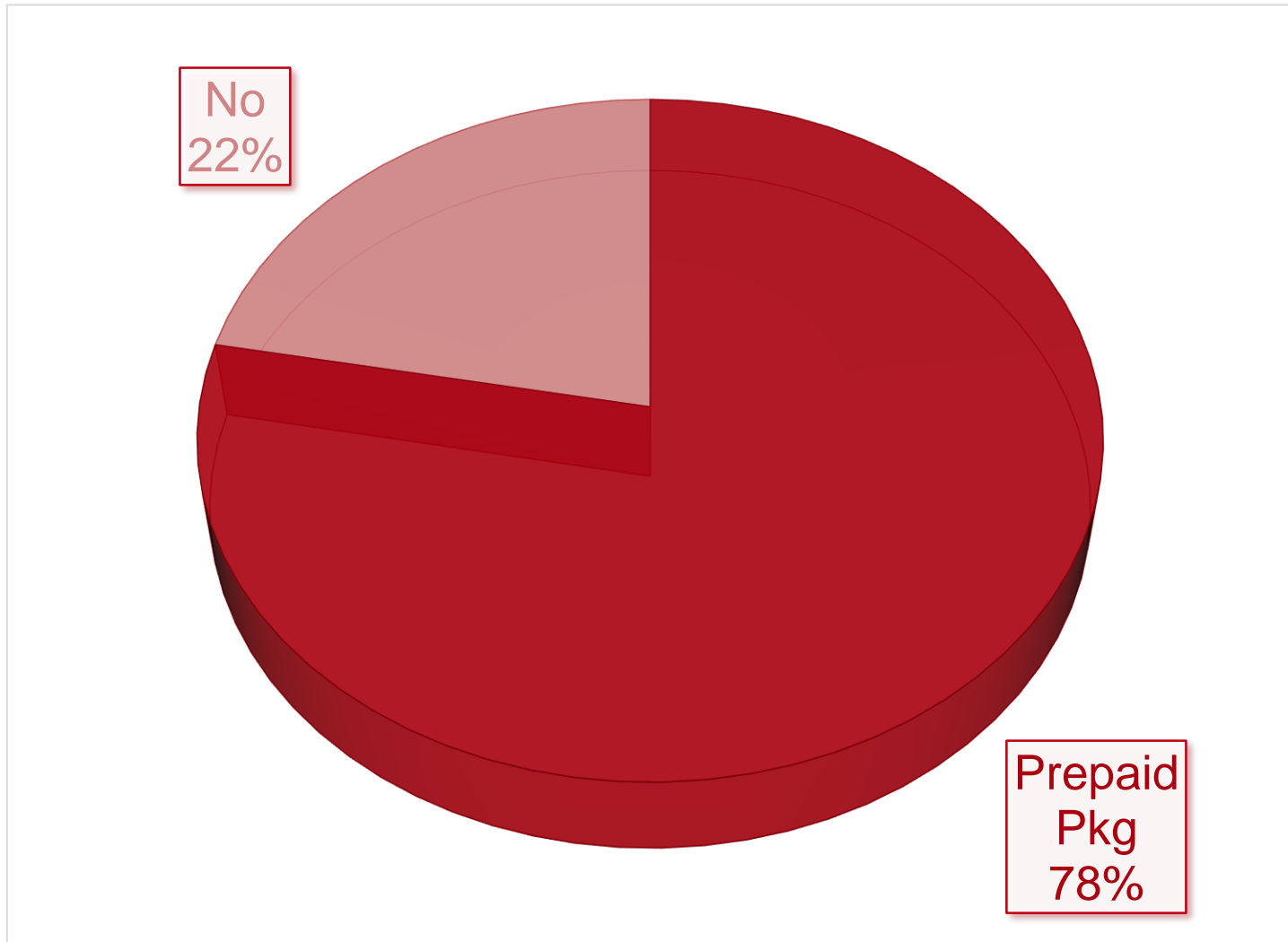


# TRAVEL ARRANGEMENT- SOURCES

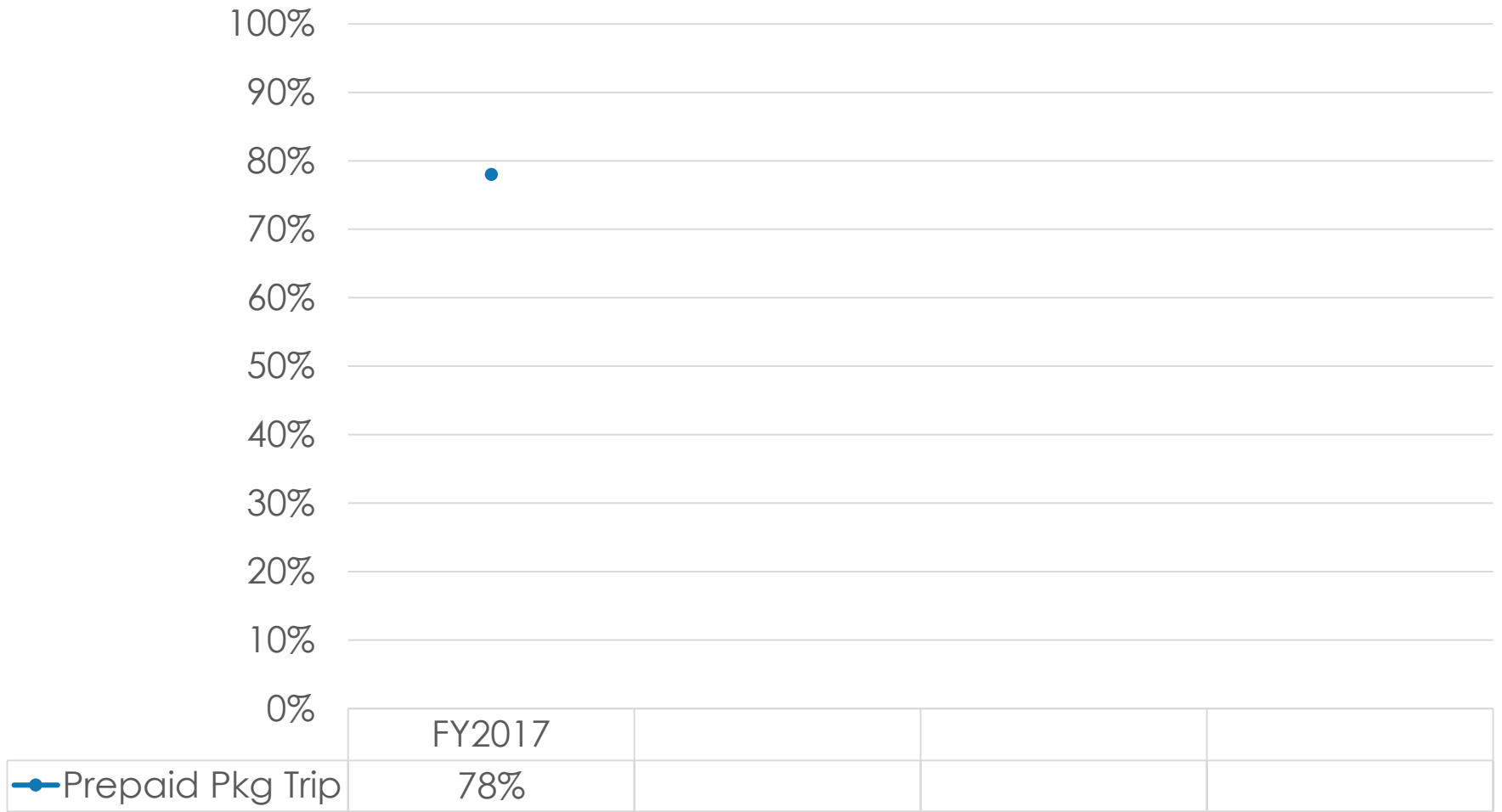


	FY2017			
Online travel agent	11%			
Trvl Agt/ Co- Pkg Tour	64%			
Online 3rd Party	5%			
Direct Air/ Hotel	20%			

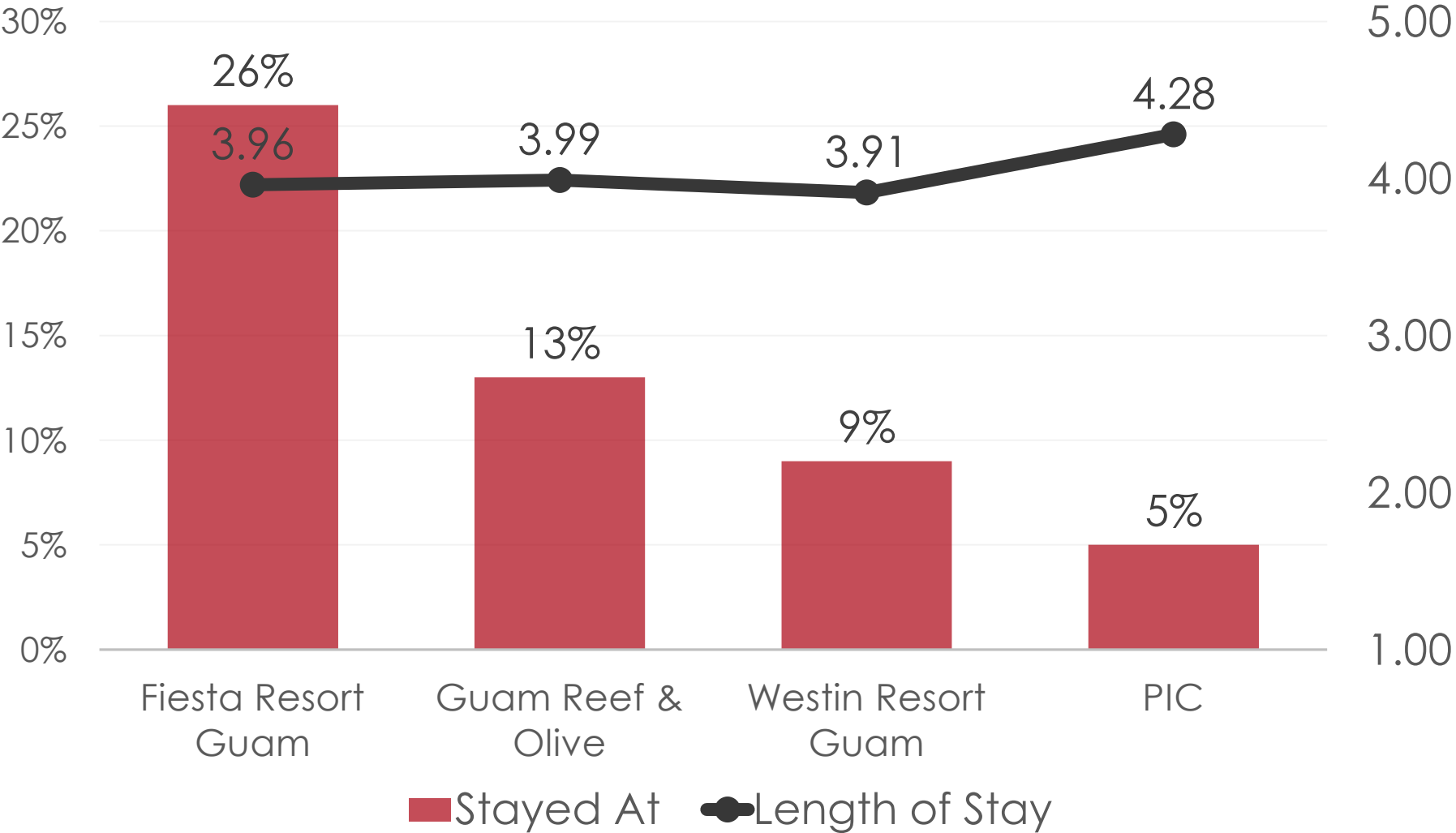
# Prepaid Package Trip



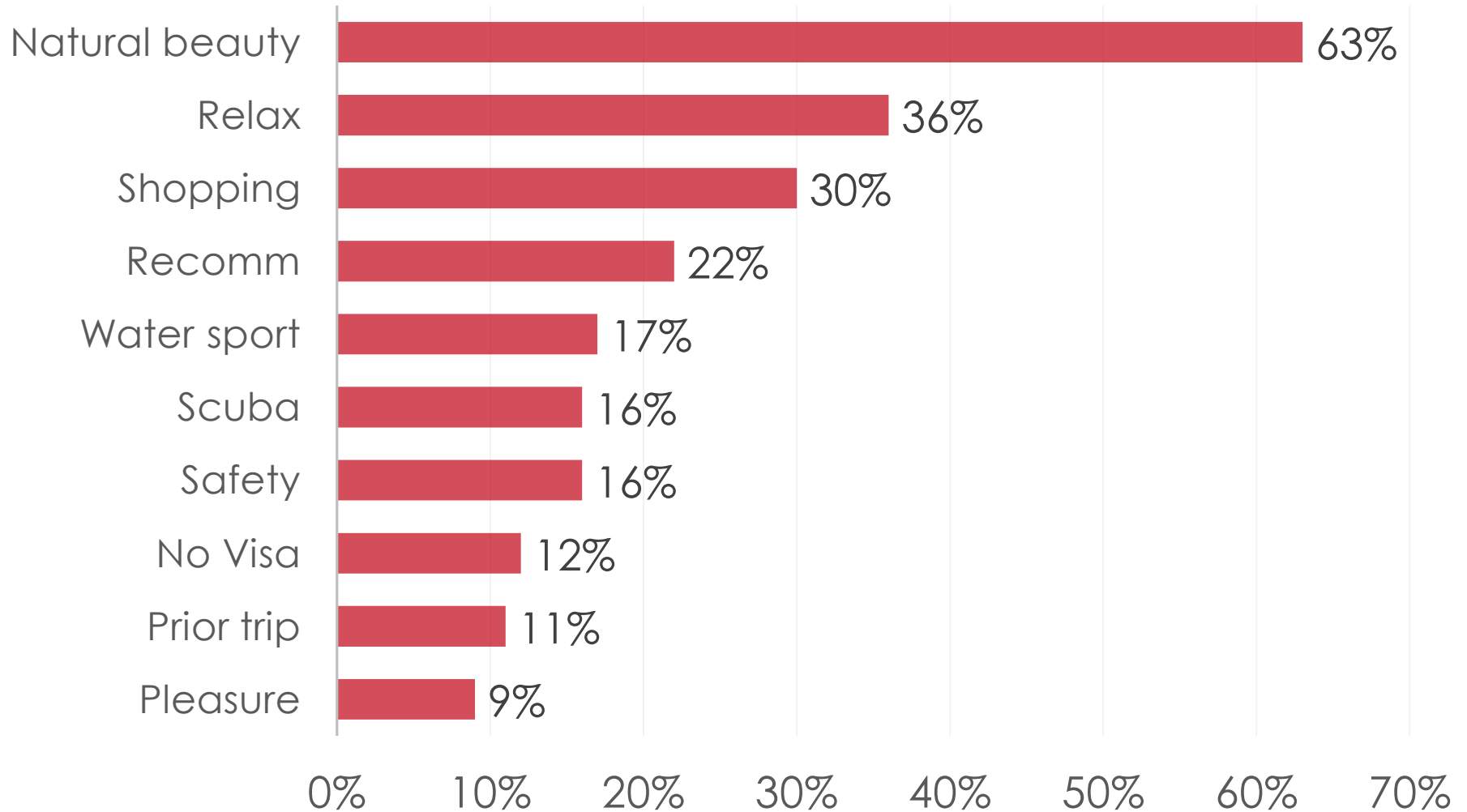
# Prepaid Package Trip



# Accommodations (Top Responses)



# Travel Motivation (Top Responses)



# Travel Motivation – Top 3

FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
37% Natural Beauty 14% Relax 7% Safety 7% Shopping	28% Natural Beauty 15% Relax 9% Safety	31% Natural Beauty 15% Relax 9% No Visa	43% Natural Beauty 12% Relax 9% Shopping	39% Natural Beauty 12% Relax 7% Shopping	63% Natural Beauty 36% Relax 30% Shopping

# SECTION 3

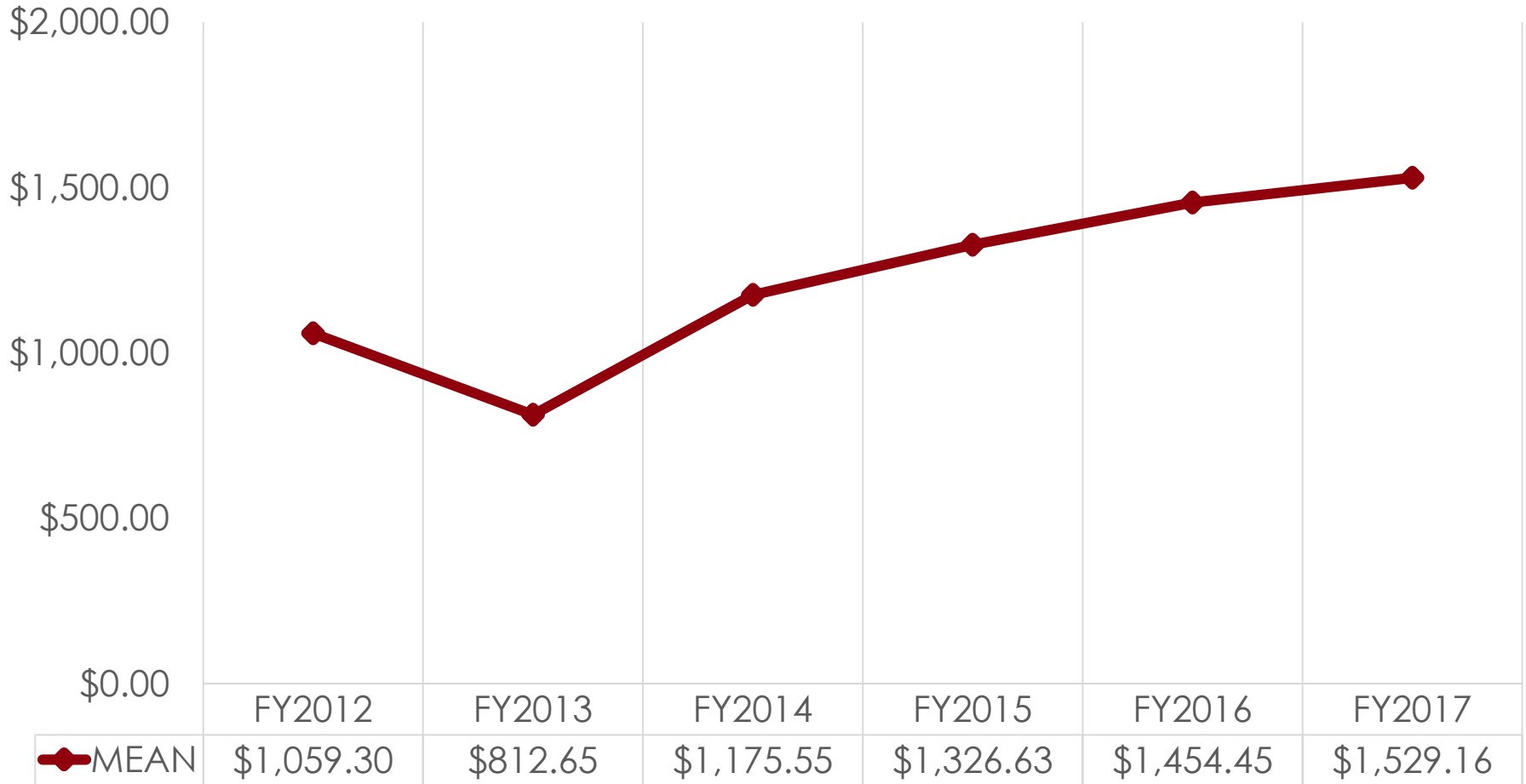
# EXPENDITURES

# Prepaid Expenditures

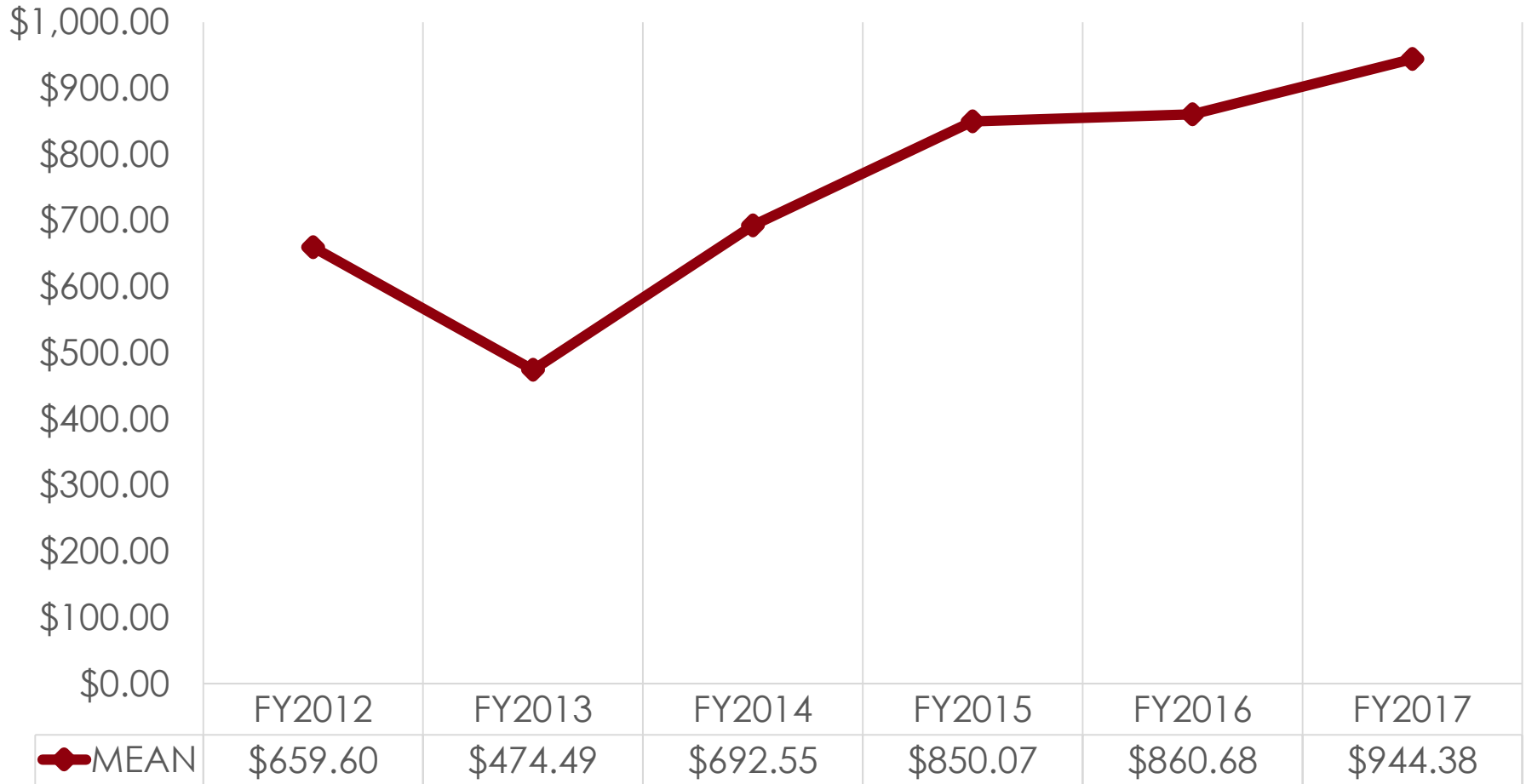
- \$1,529.16 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$944.38 = overall mean average per person prepaid expenditures



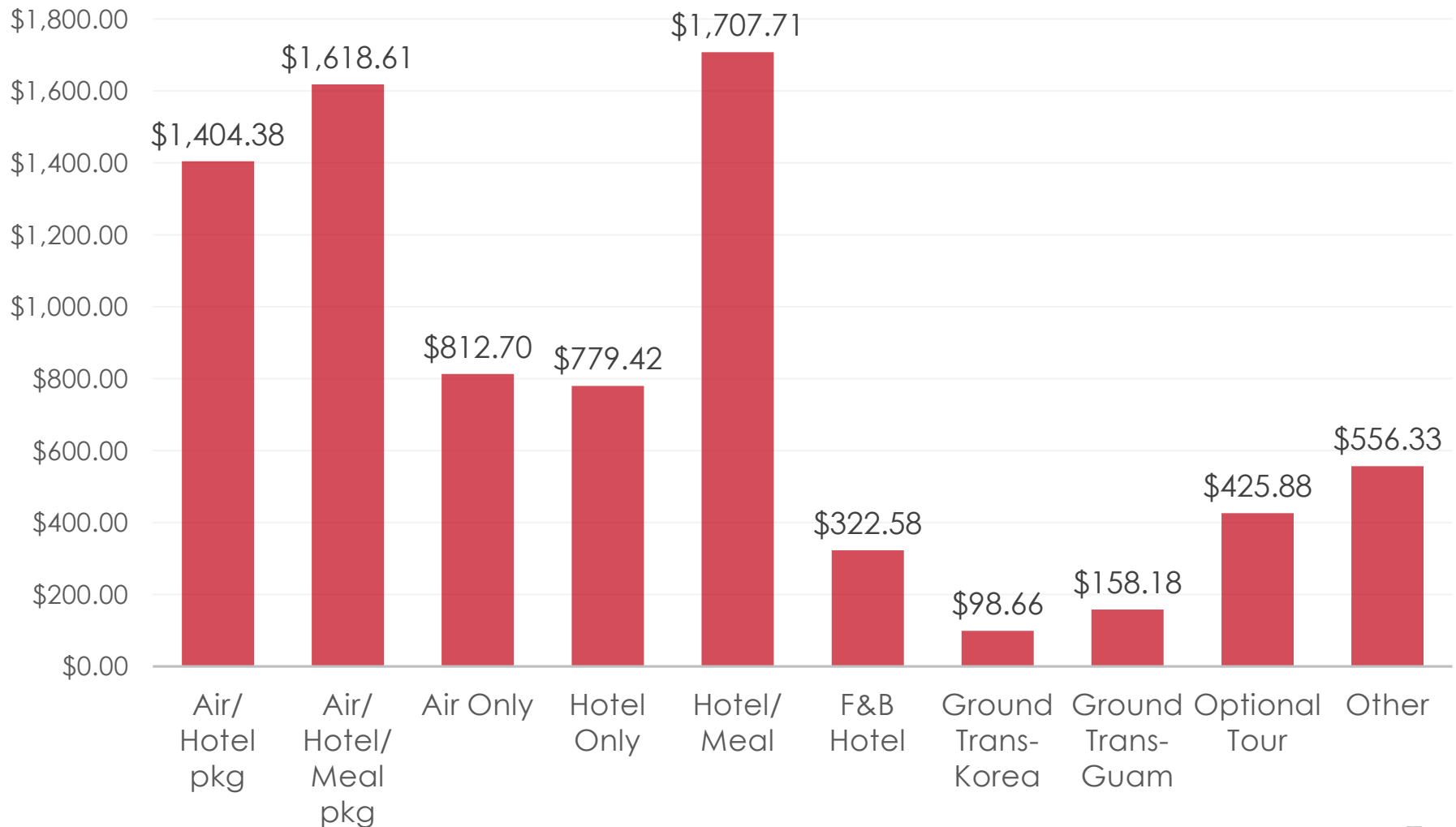
# Prepaid Entire Travel Party – Tracking



# Prepaid Per Person – Tracking

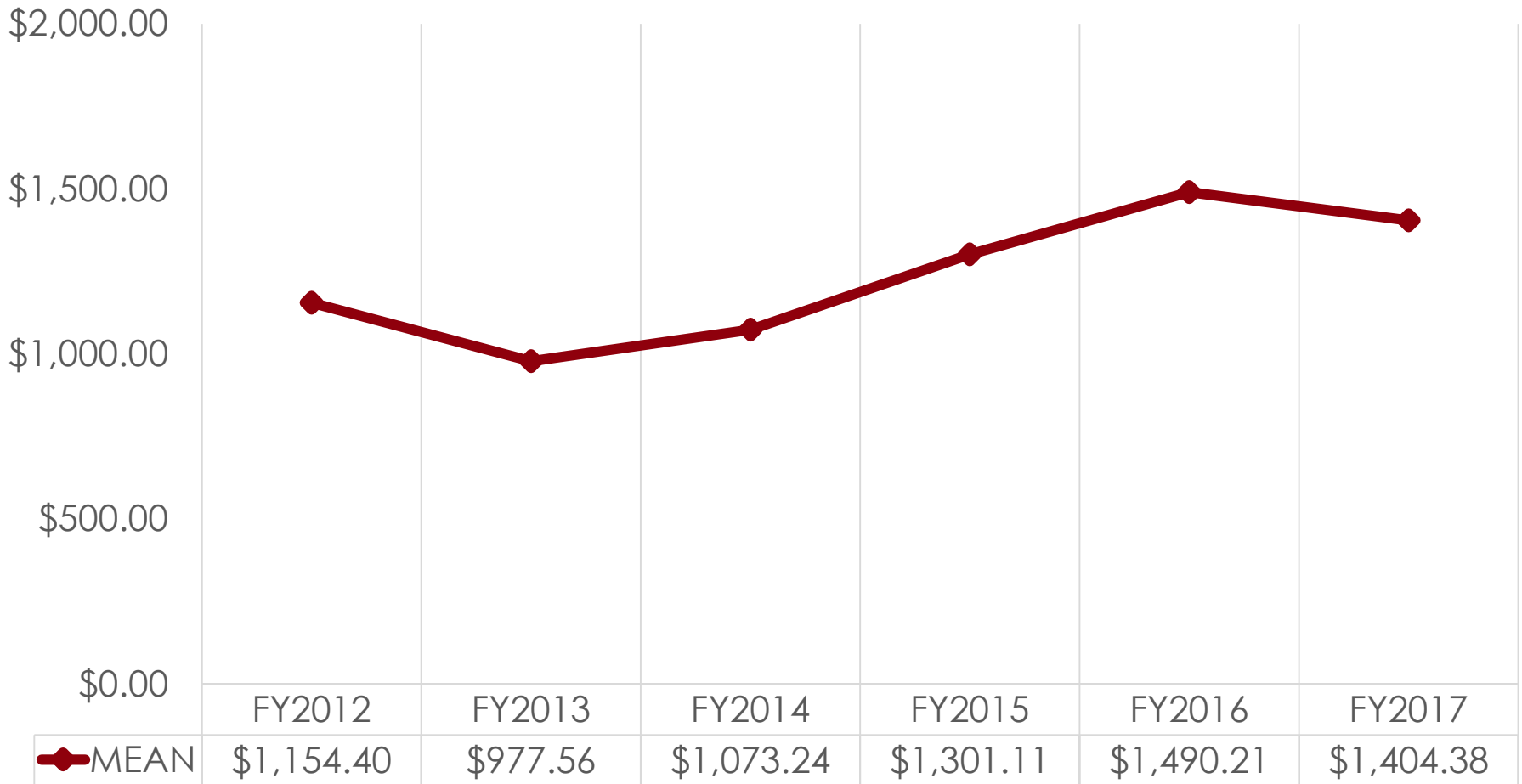


# Prepaid Expenses by Category – Mean Entire Travel Party



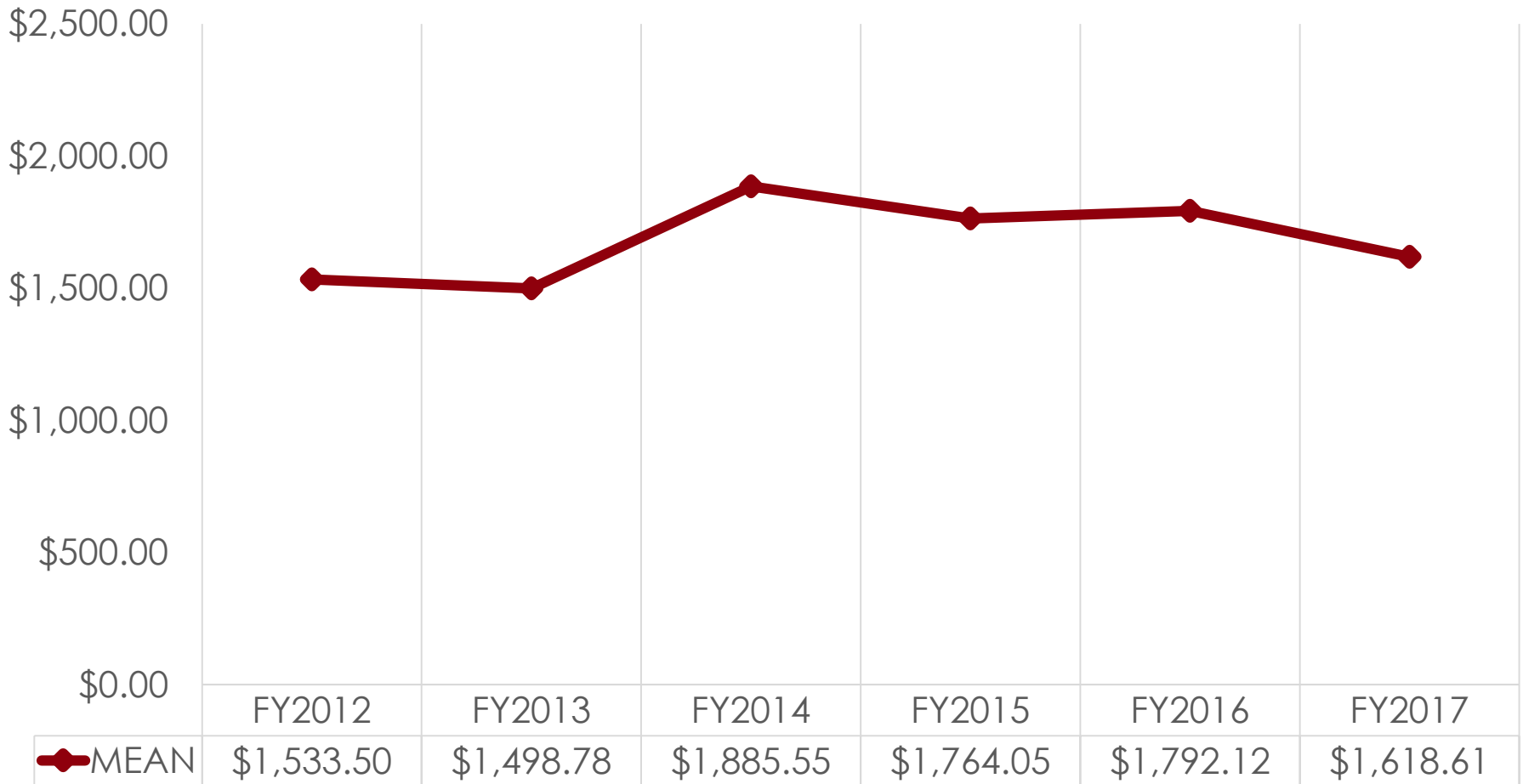
# Prepaid – Tracking

## Airfare & Accommodation Packages

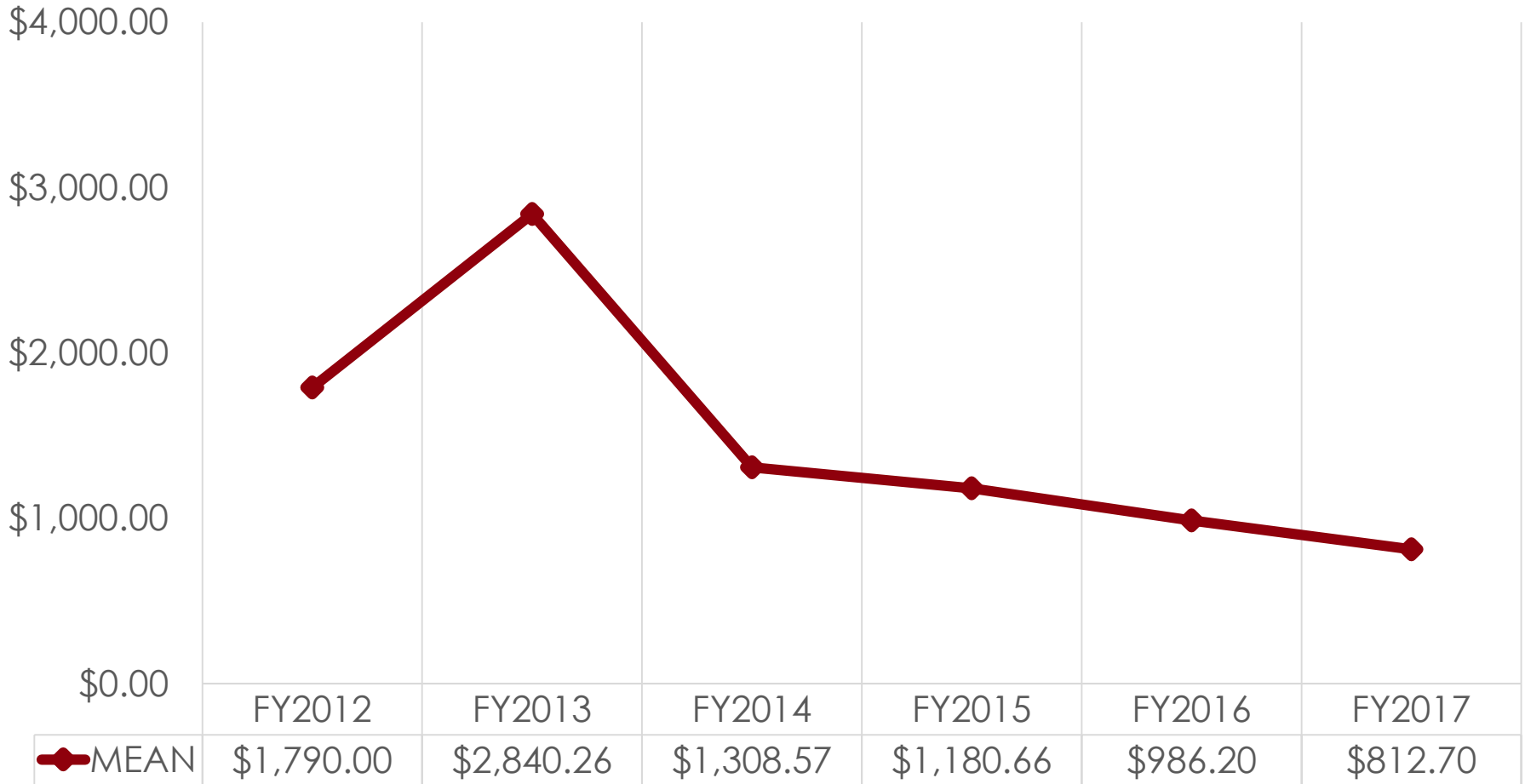


# Prepaid – Tracking

## Airfare & Accommodation W/ Meal Packages

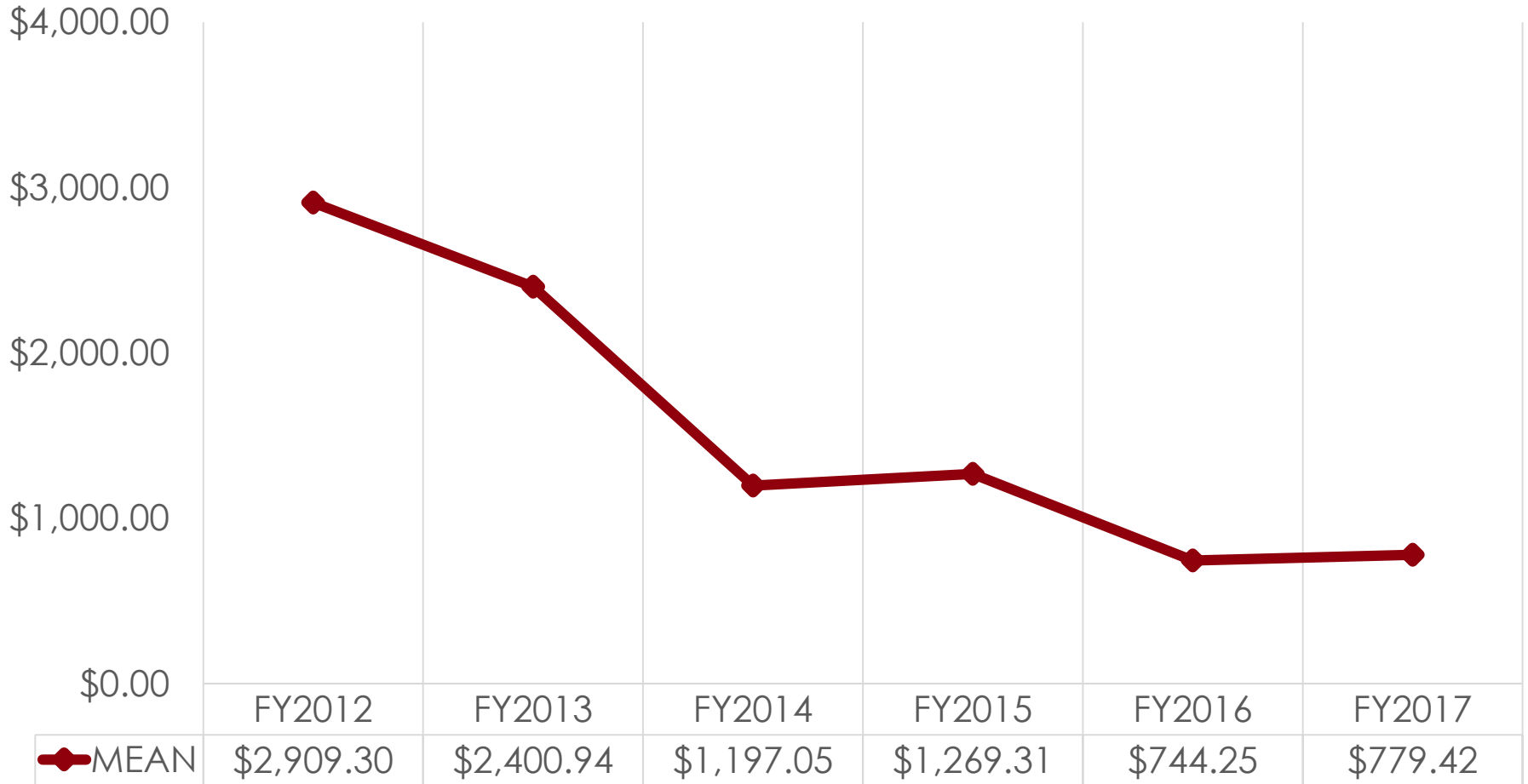


# Prepaid – Tracking Airfare Only



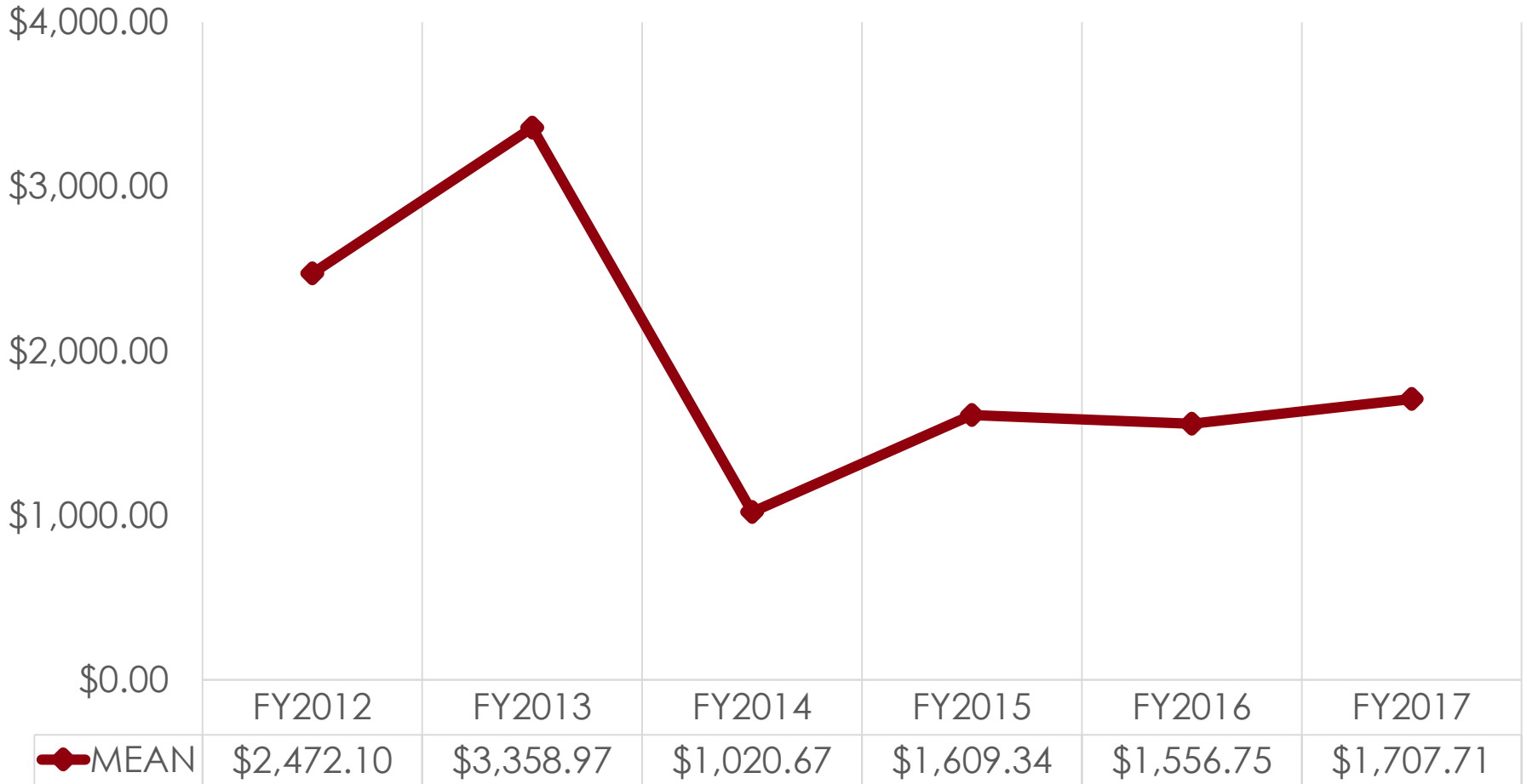
# Prepaid – Tracking

## Accommodations Only



# Prepaid – Tracking

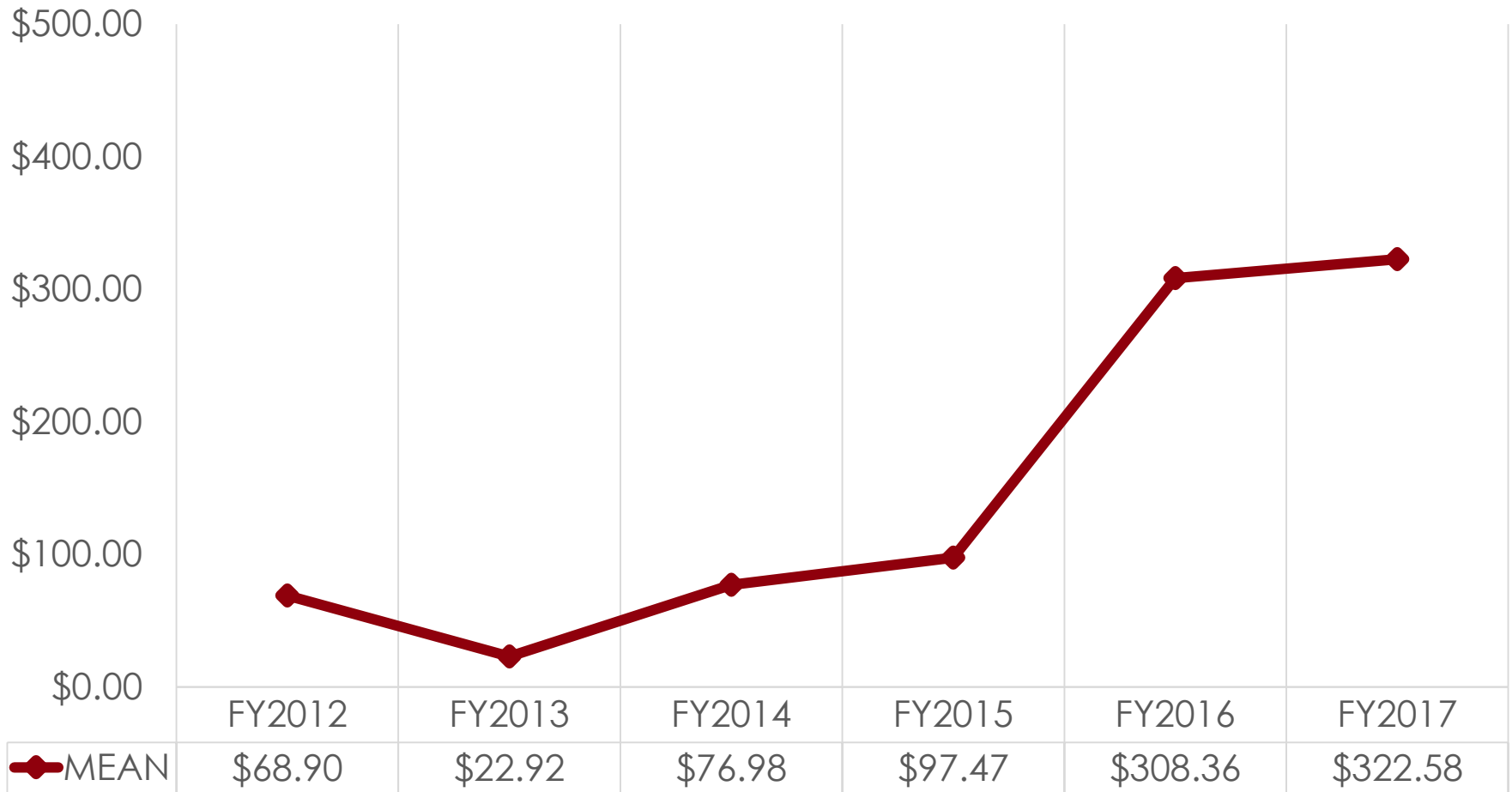
## Accommodations w/ Meal Only





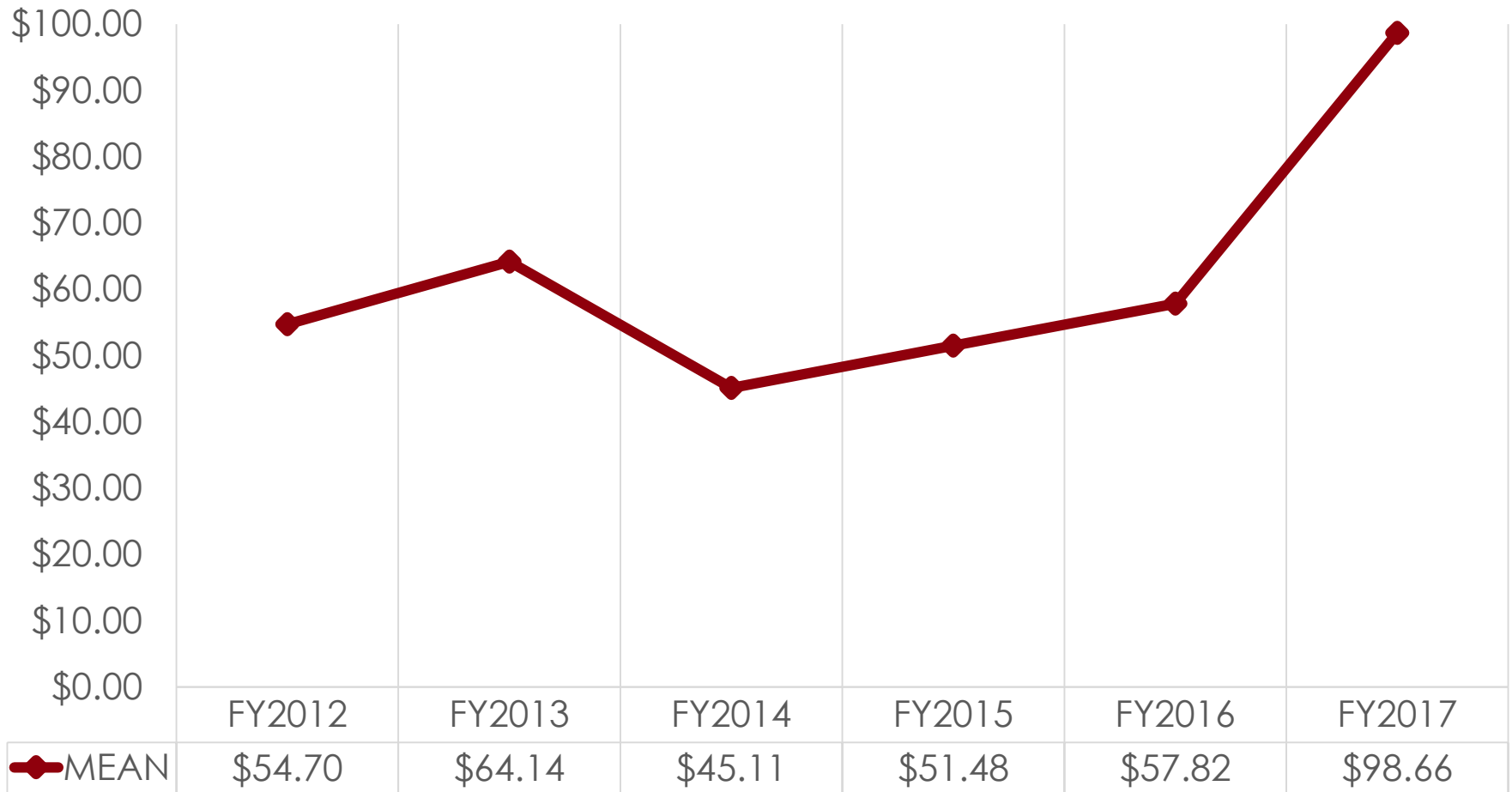
# Prepaid – Tracking

## *Food & Beverage in Hotel*



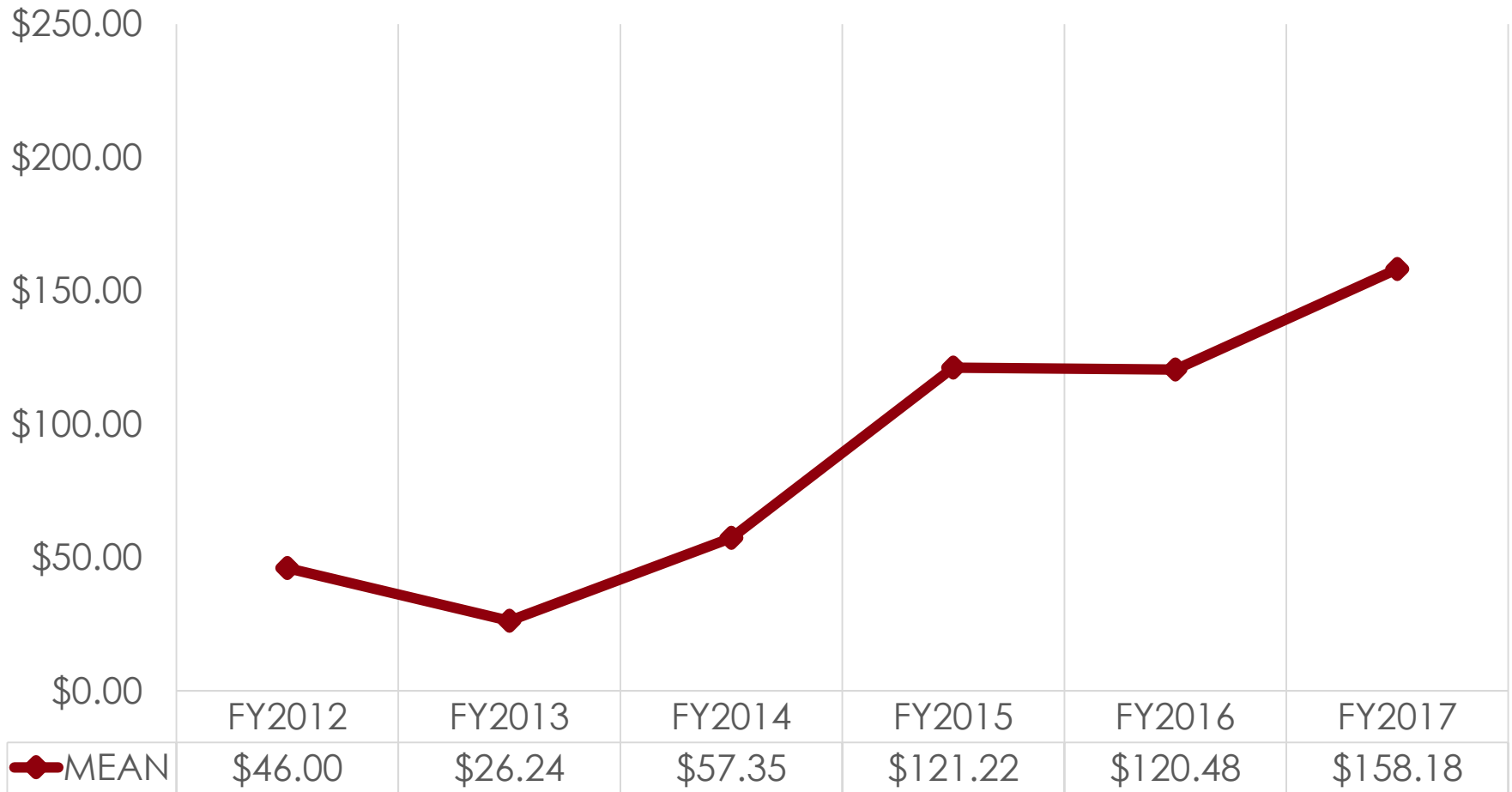
# Prepaid – Tracking

## Ground Transportation - Taiwan



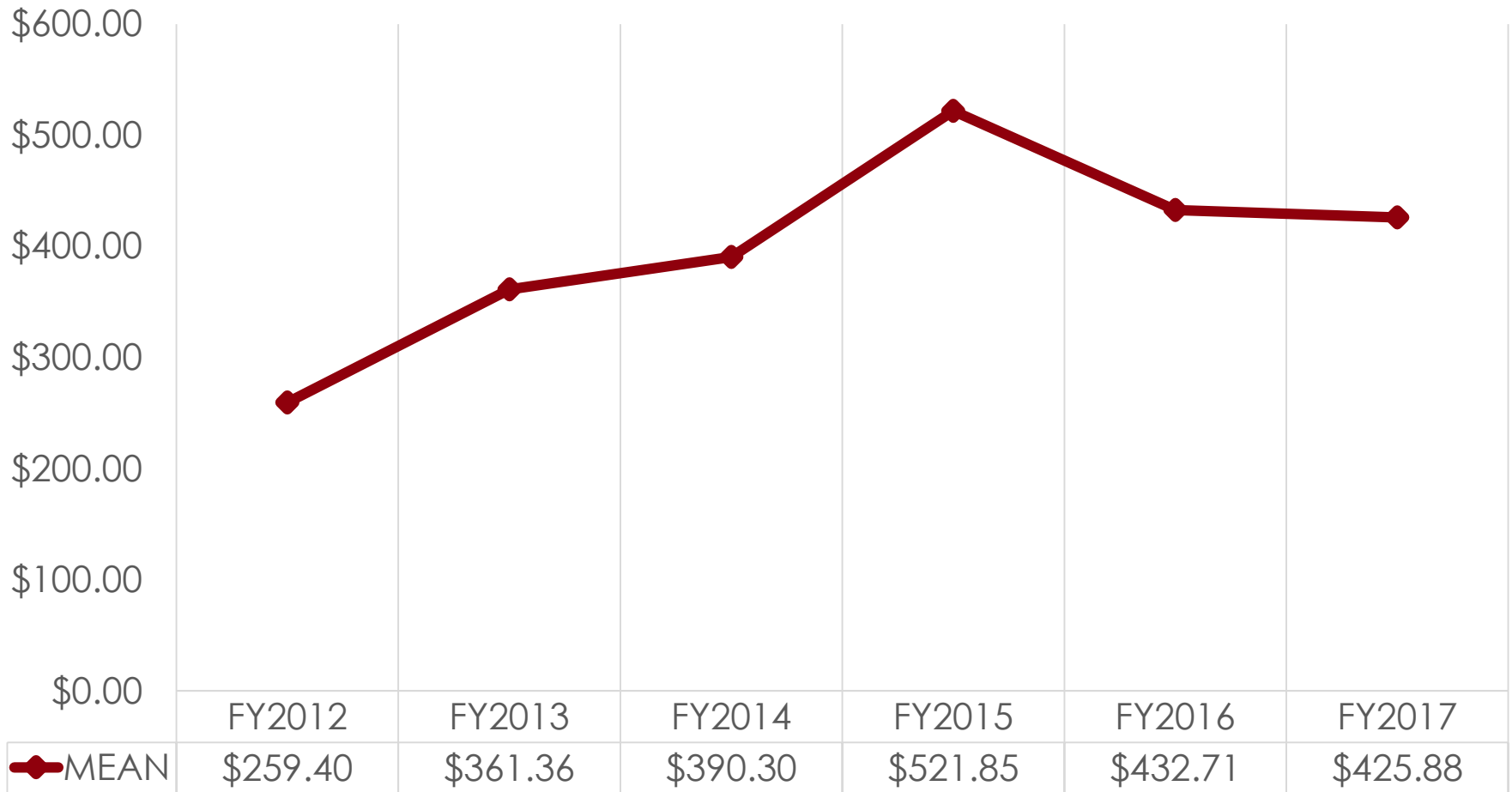
# Prepaid – Tracking

## Ground Transportation - Guam



# Prepaid – Tracking

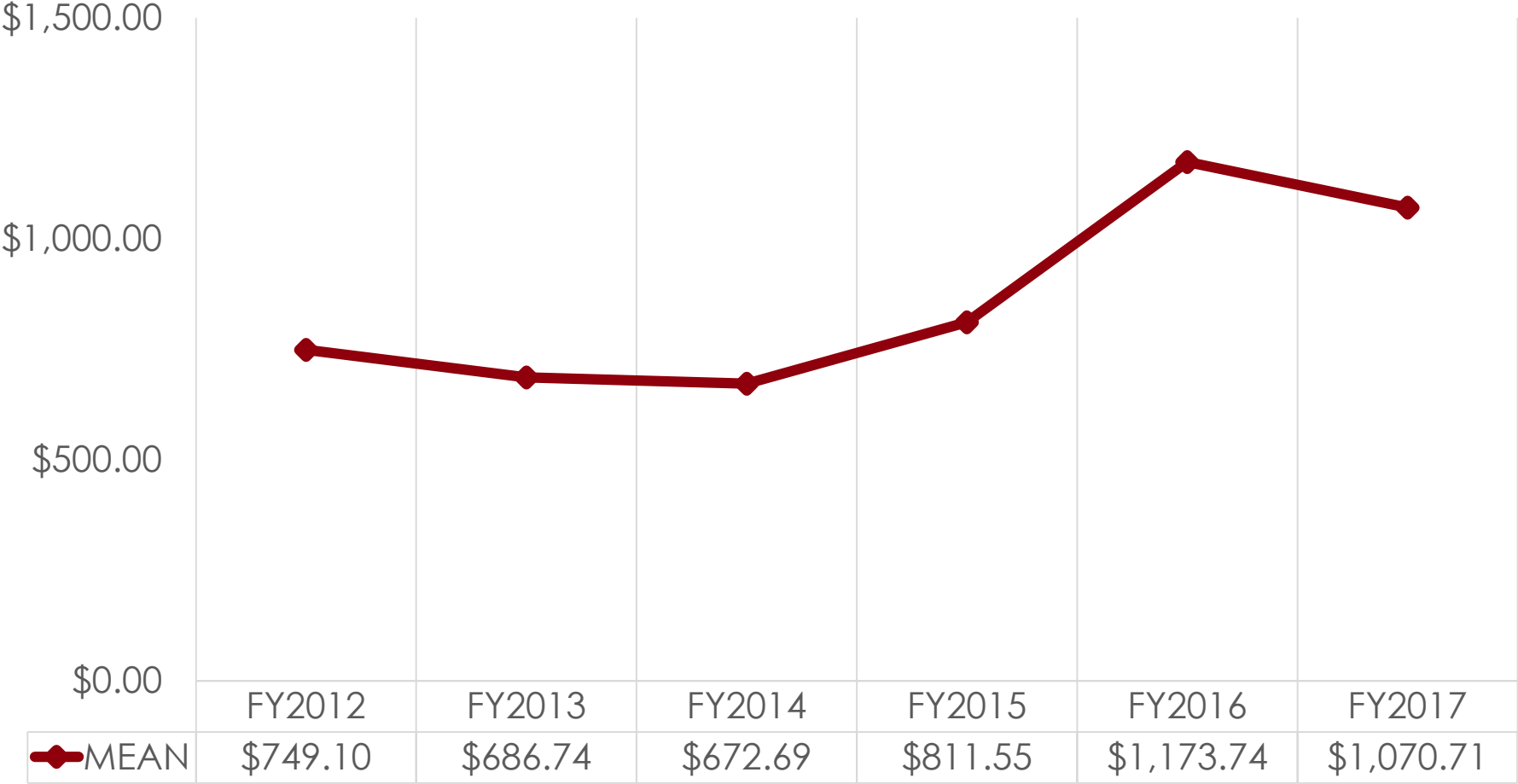
## Optional tours/ Activities



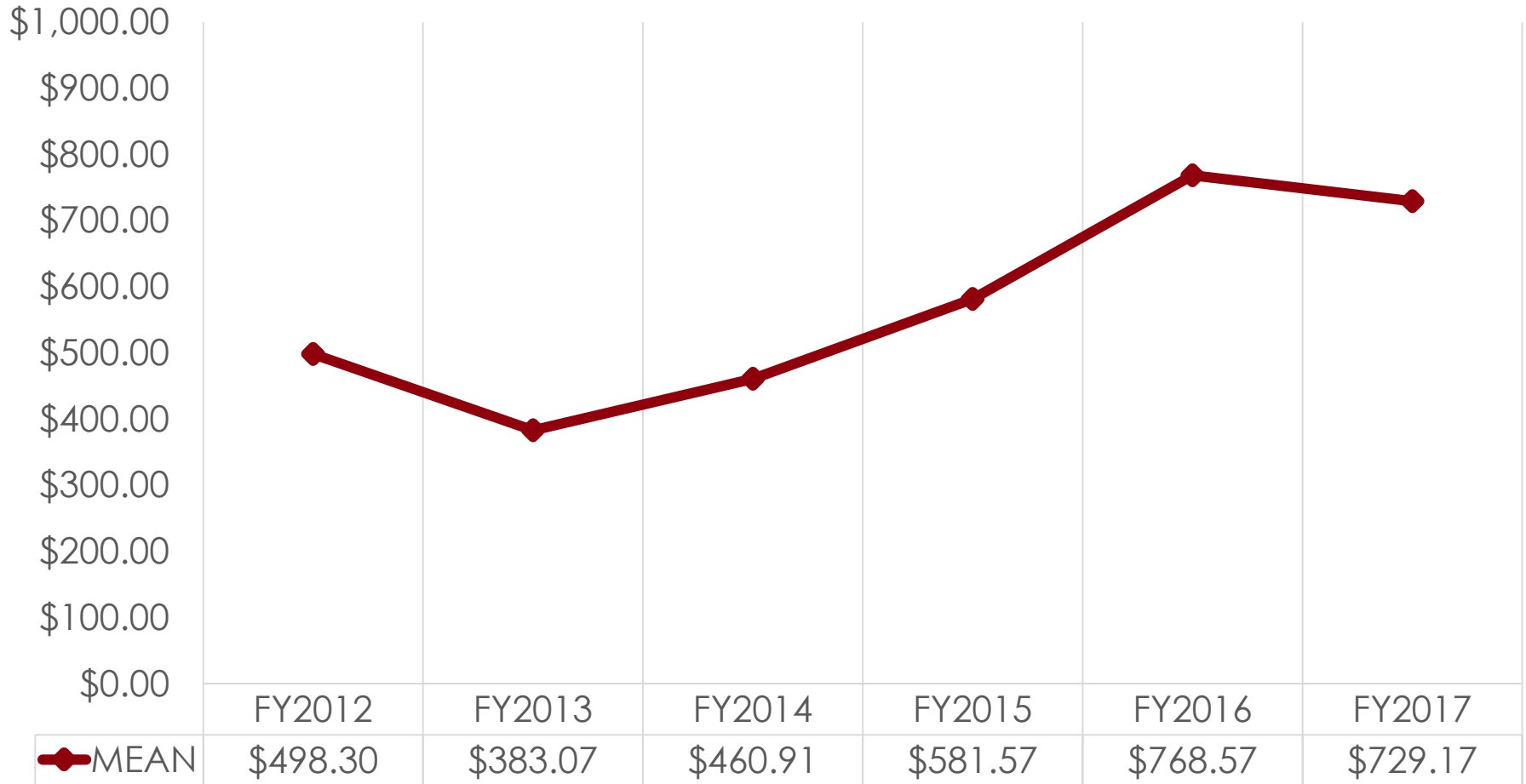
# On-Island Expenditures

- \$1,070.71 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$729.17 = overall mean average per person prepaid expenditures

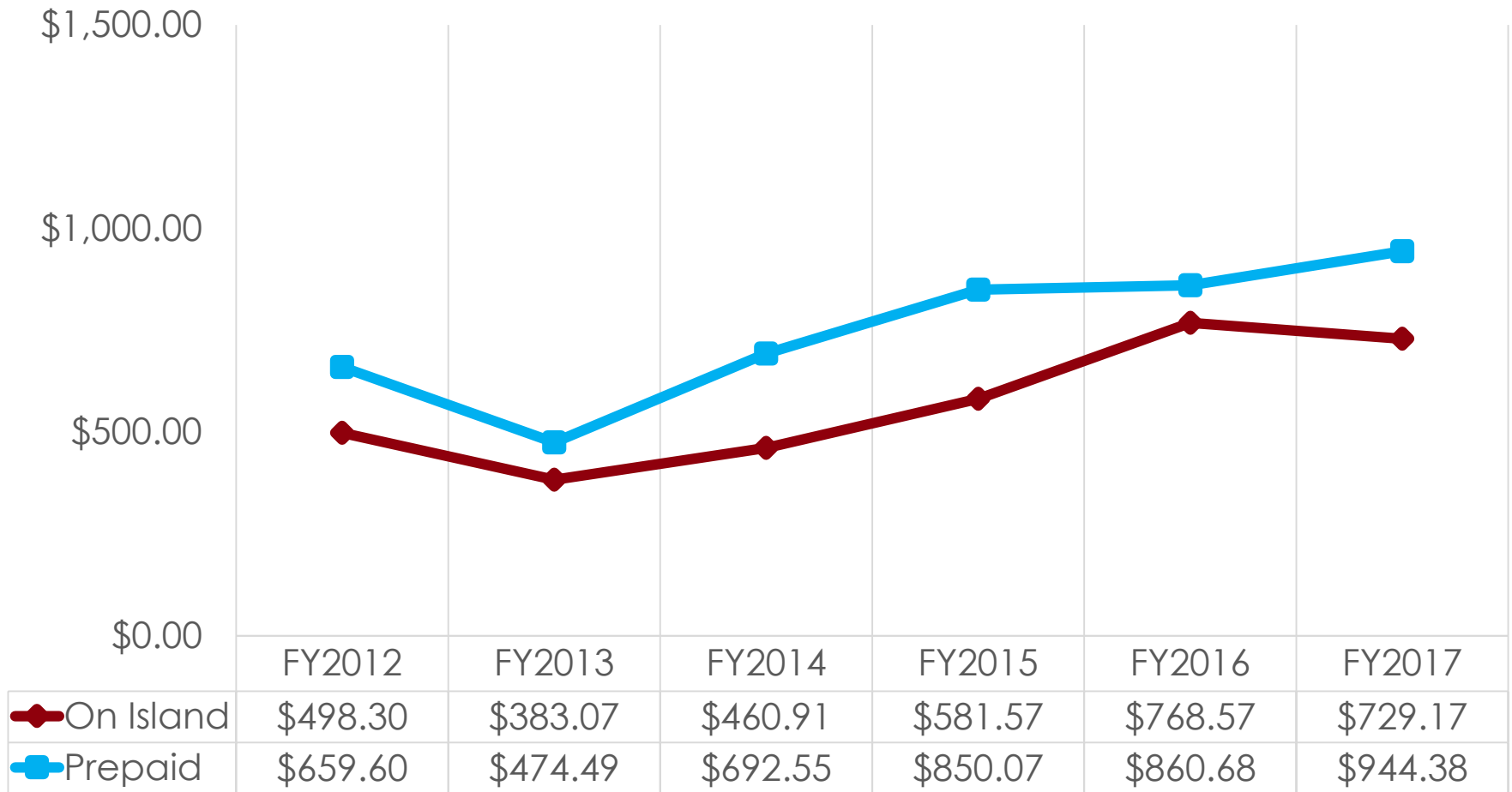
# On-Island Entire Travel Party – Tracking



# On-Island Per Person – Tracking

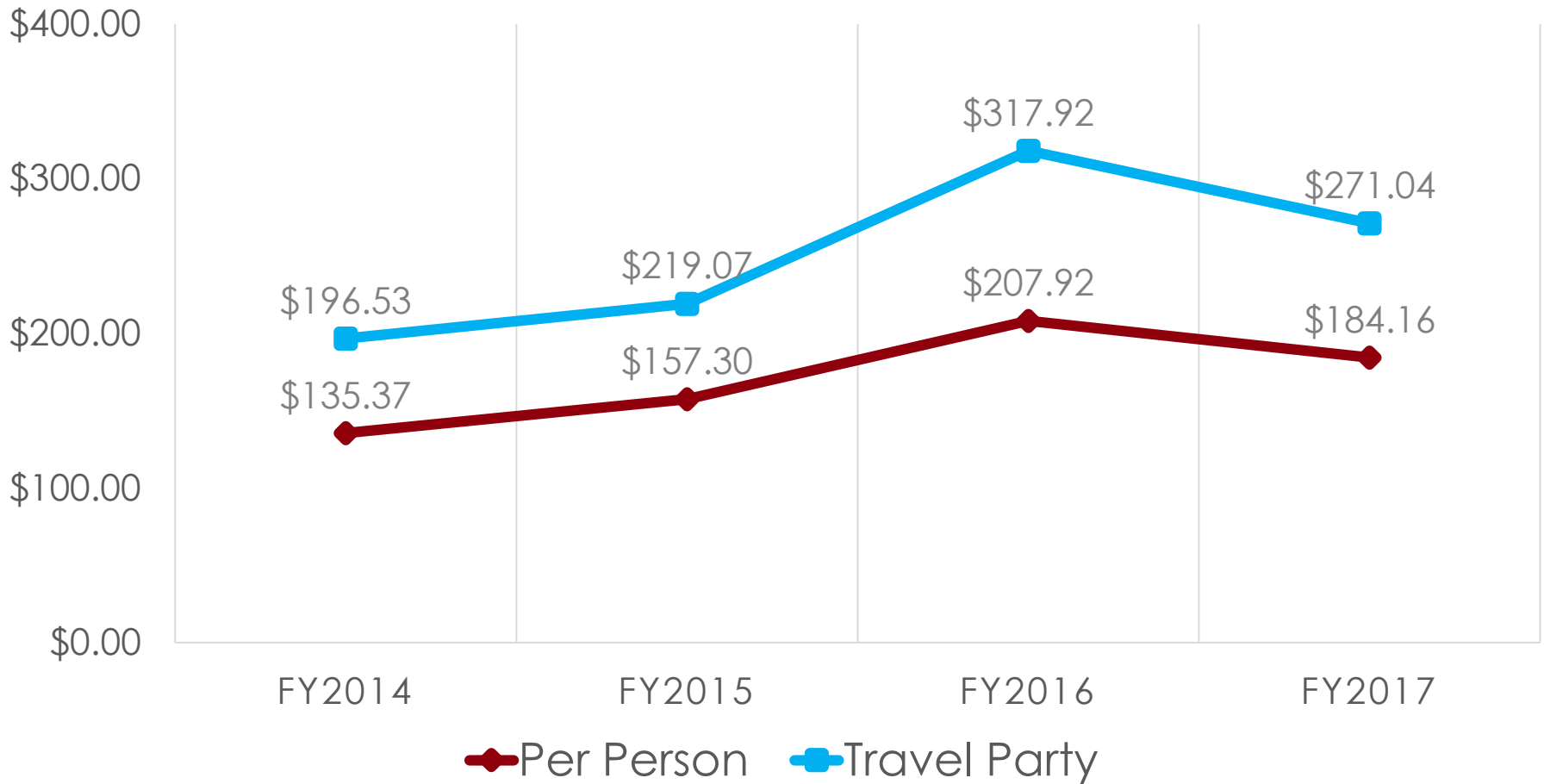


# Per Person MEAN expenditures – Tracking On-Island/ Prepaid





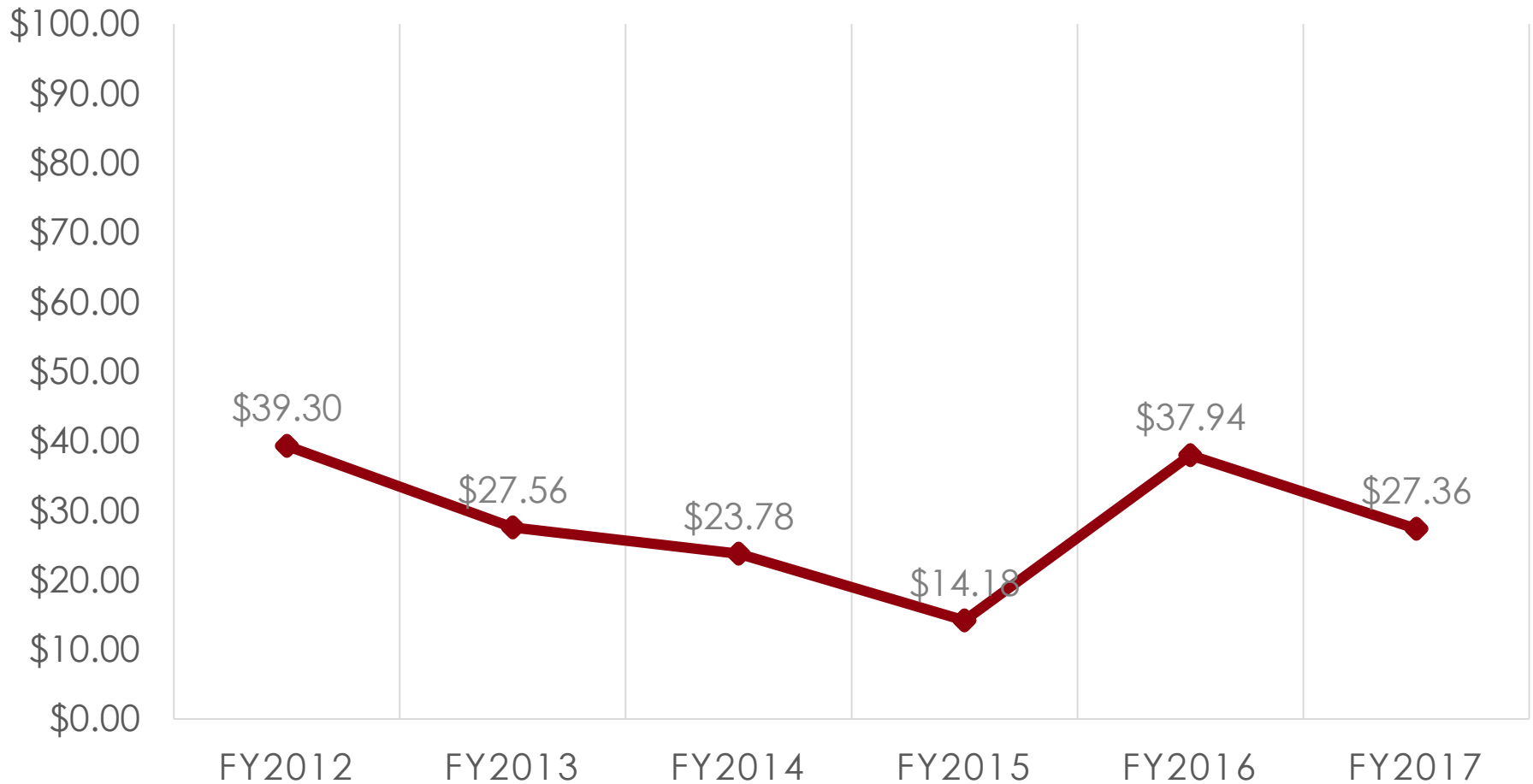
# On-Island Per Day Spending – Tracking Mean



# On-Island Expenses by Category – Mean Entire Travel Party

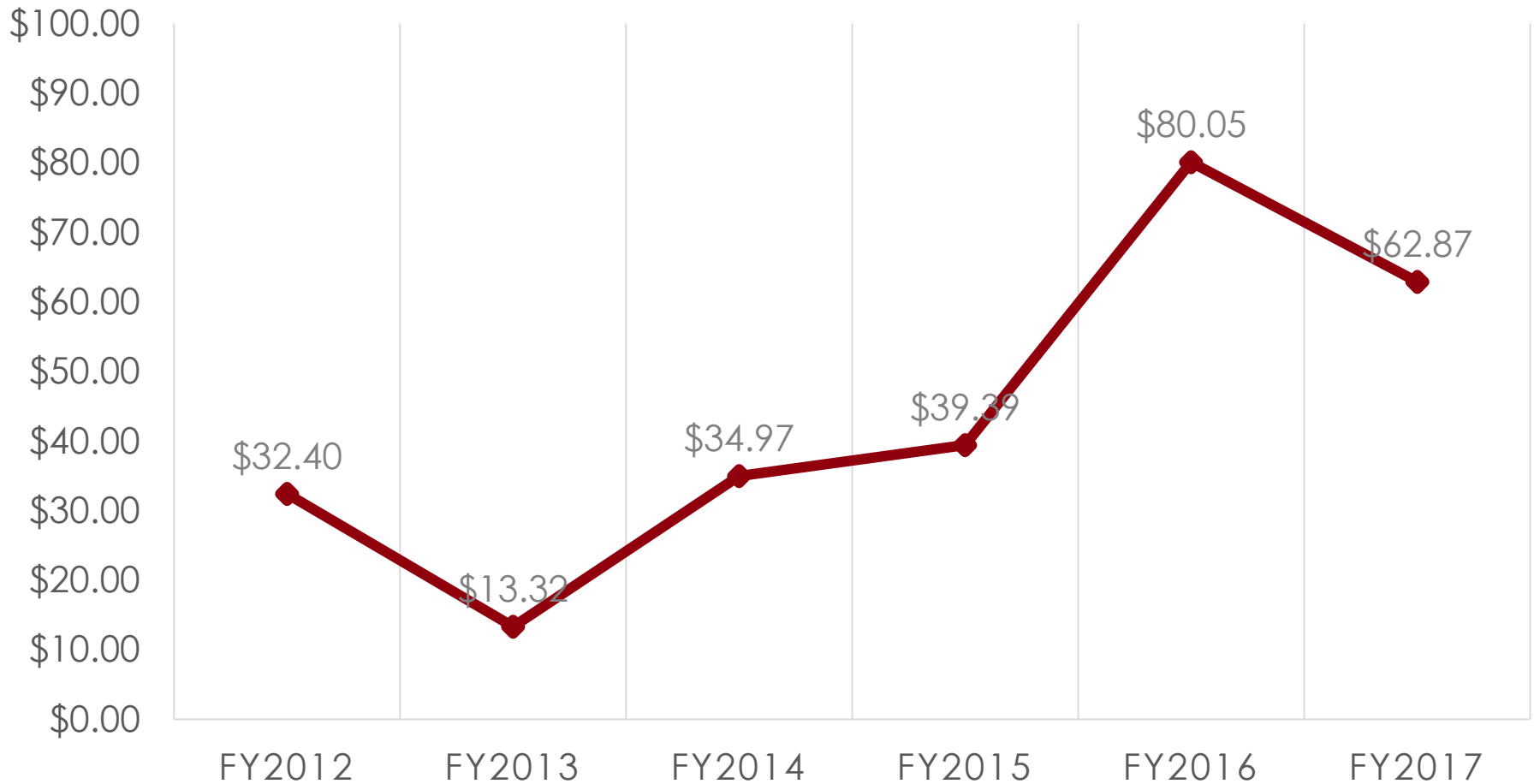


# On-Island – Tracking Food & Beverage - Hotel



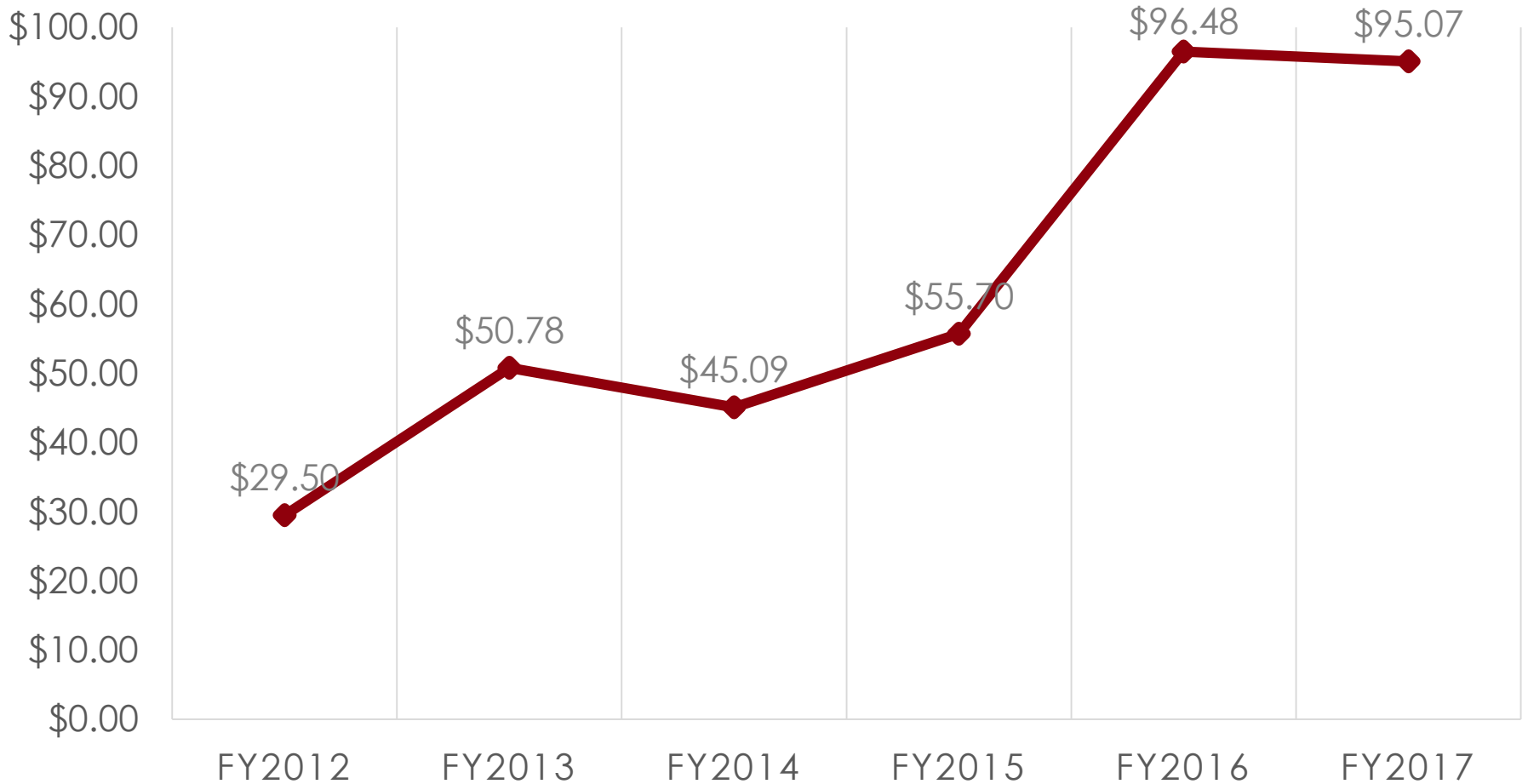
# On-Island – Tracking

## Food & Beverage – Fast Food/ Convenience Store

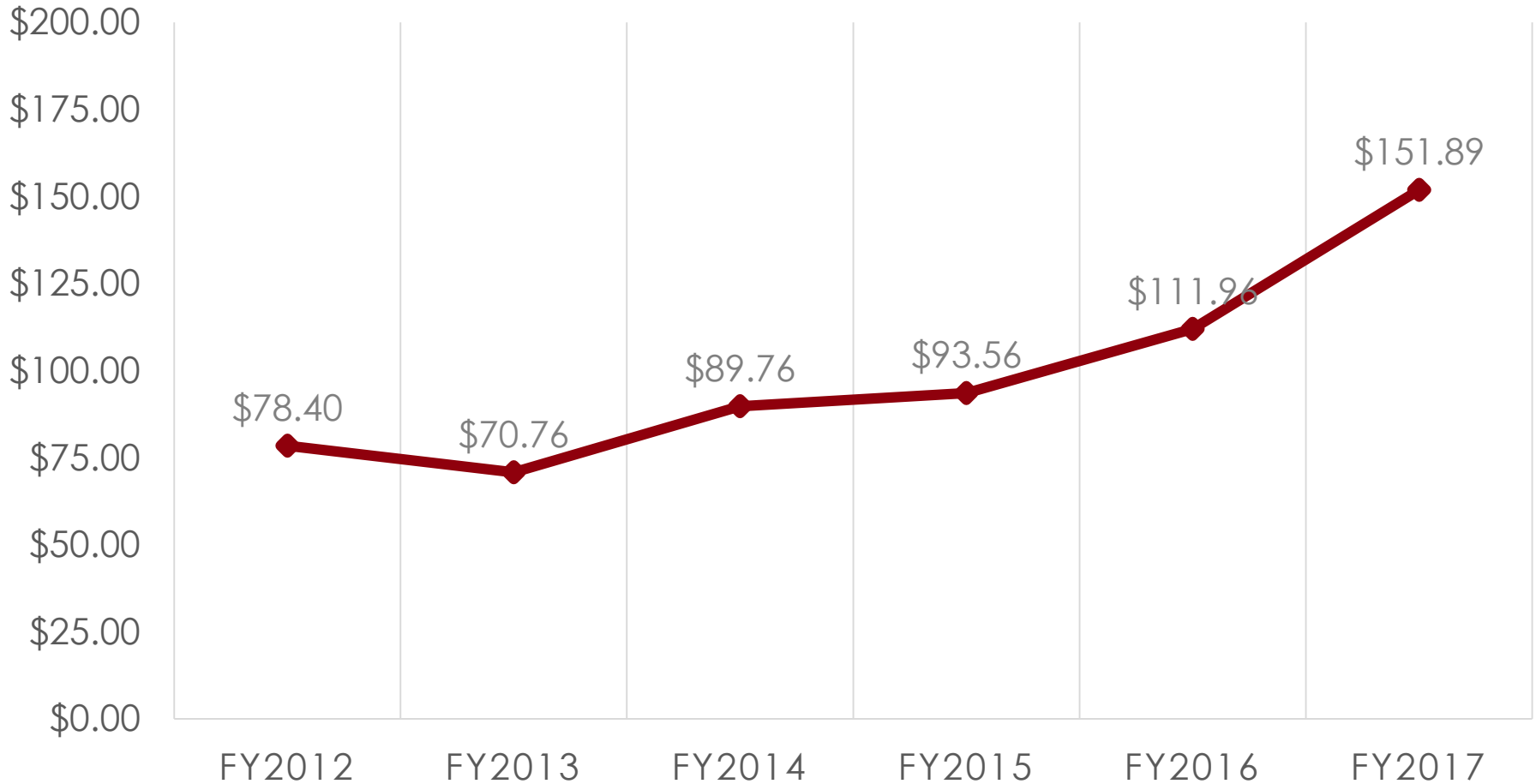


# On-Island – Tracking

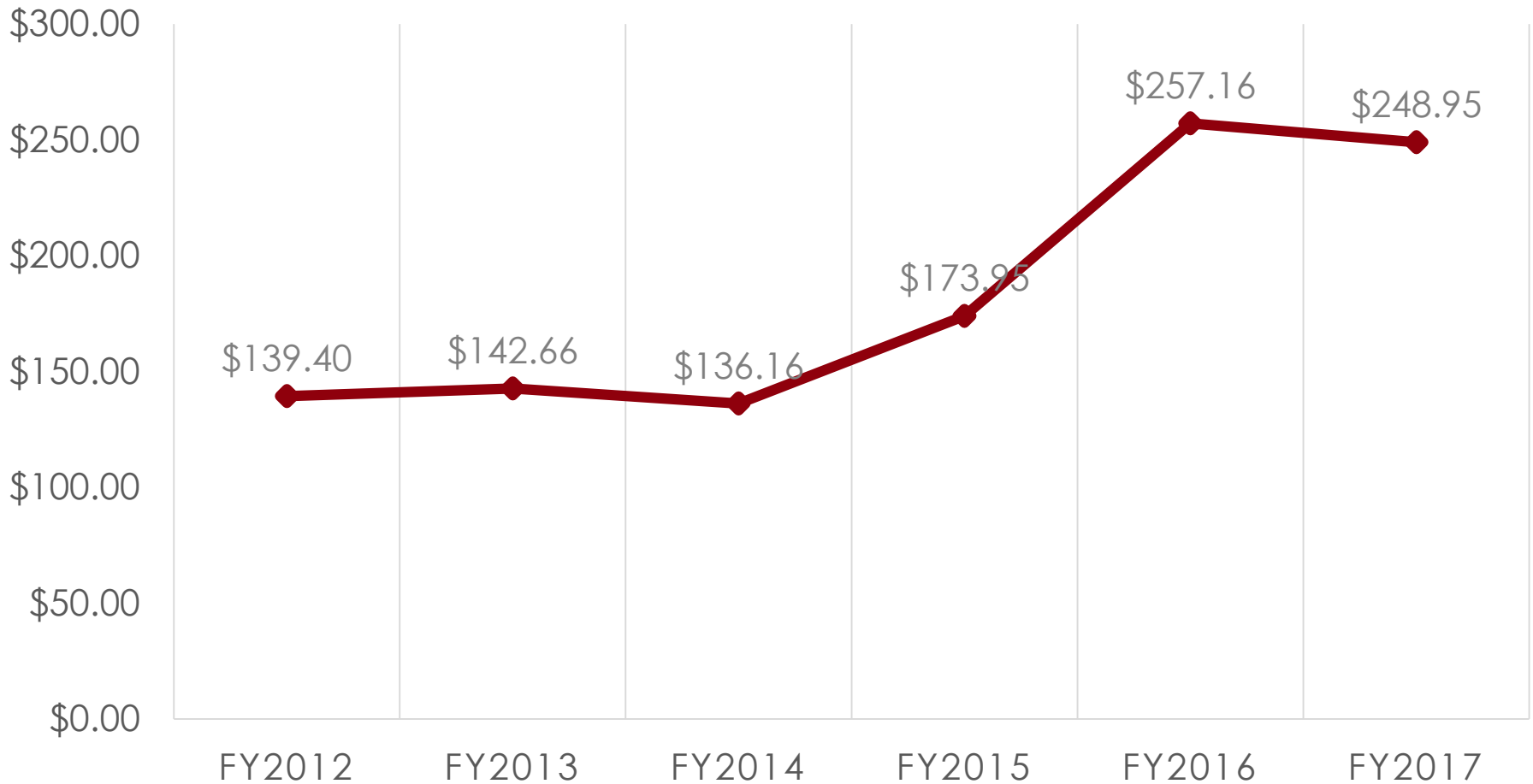
## Food & Beverage – Restaurant/ Drinking Est Outside Hotel



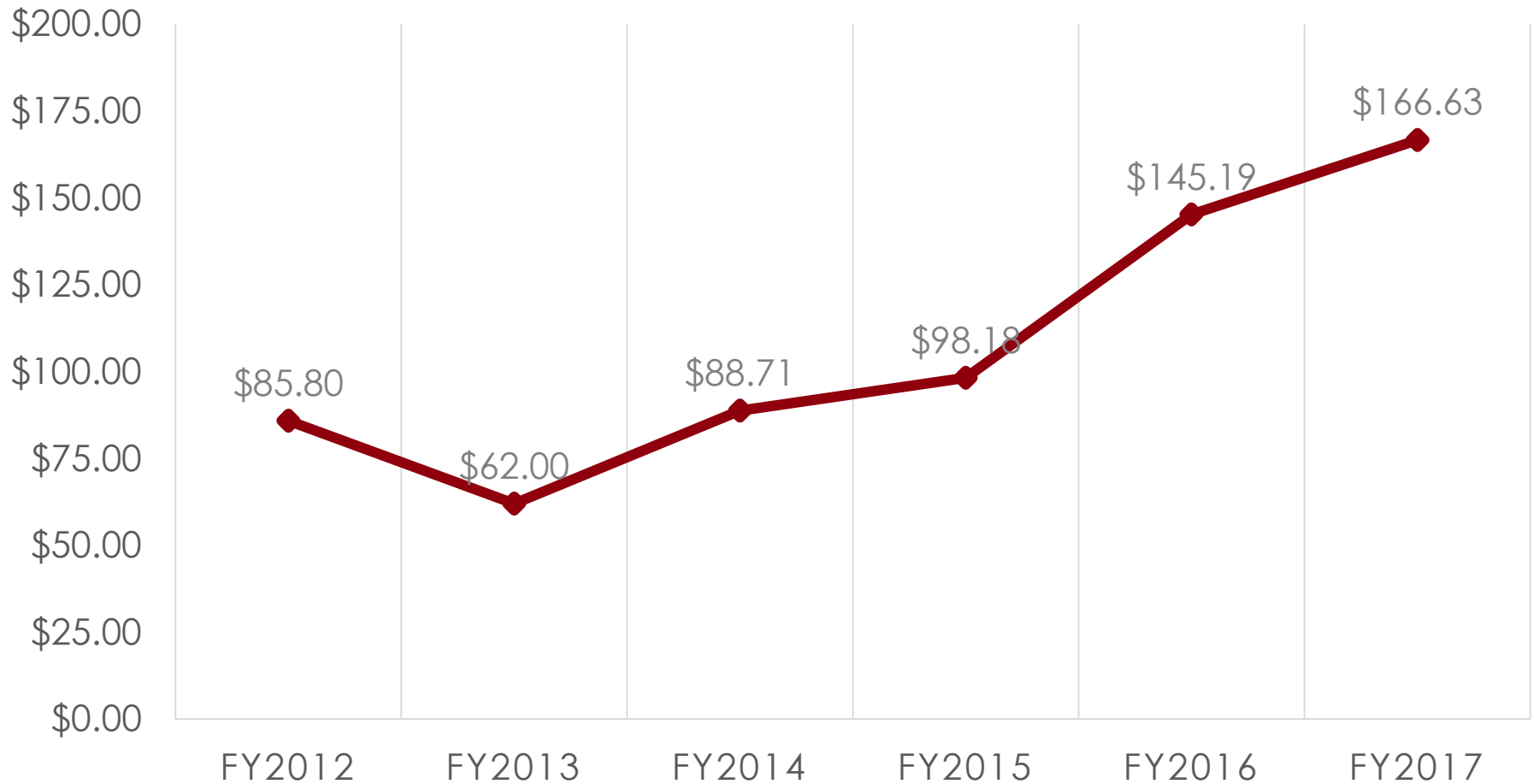
# On-Island – Tracking Optional tour/ Activities



# On-Island – Tracking Gift/ Souvenir – Self/ Companion

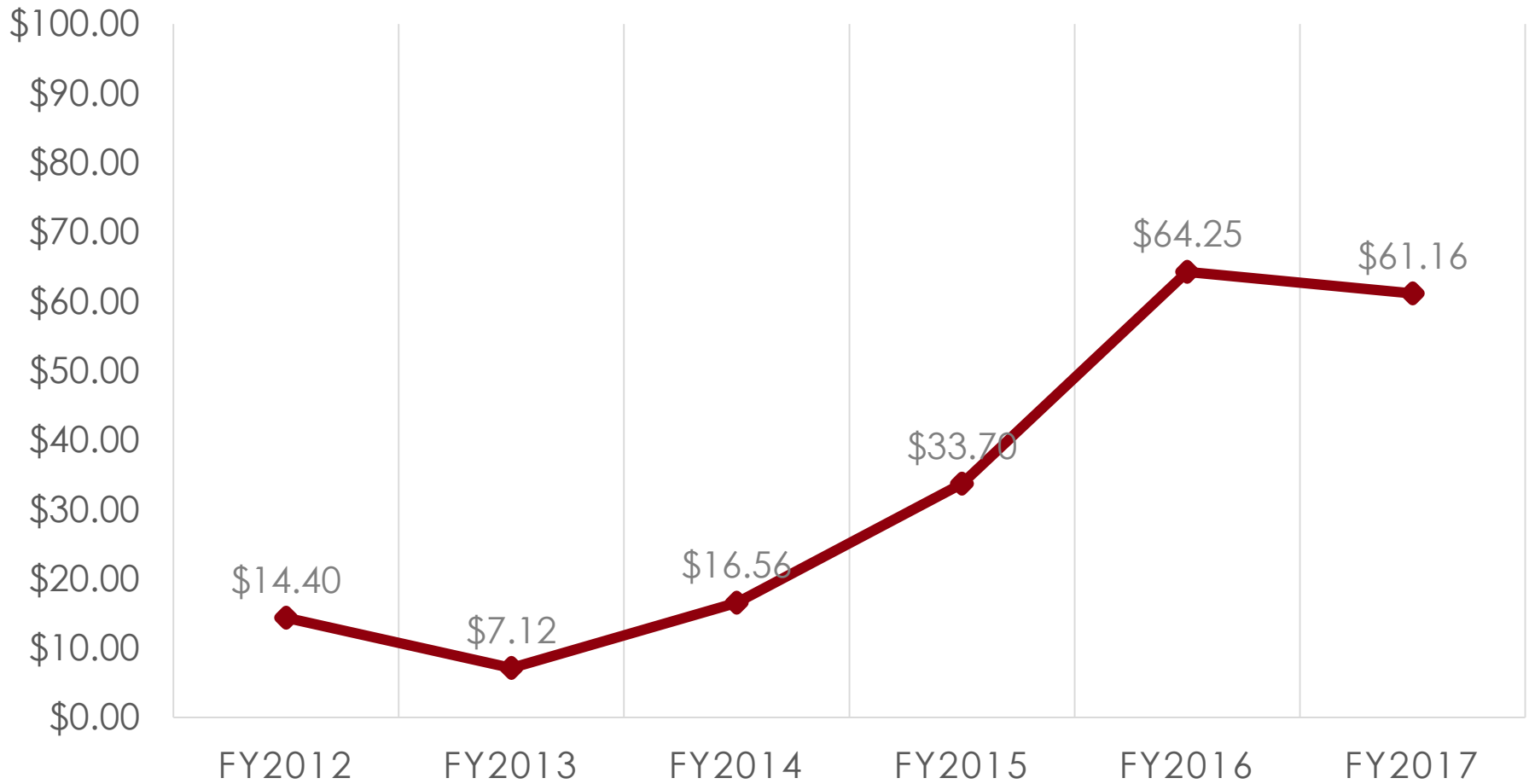


# On-Island – Tracking Gift/ Souvenir – Friends/ Family

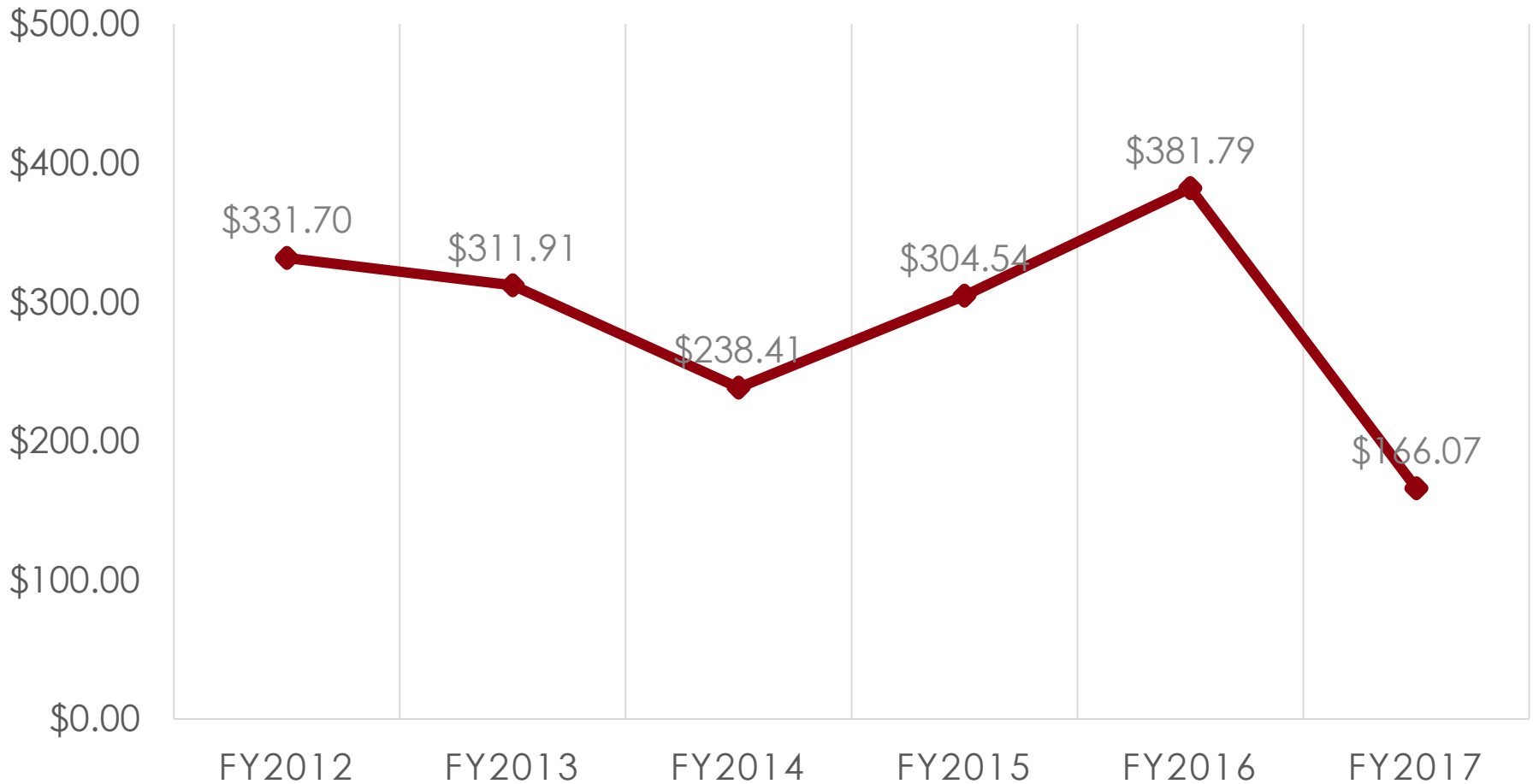




# On-Island – Tracking Local Transportation



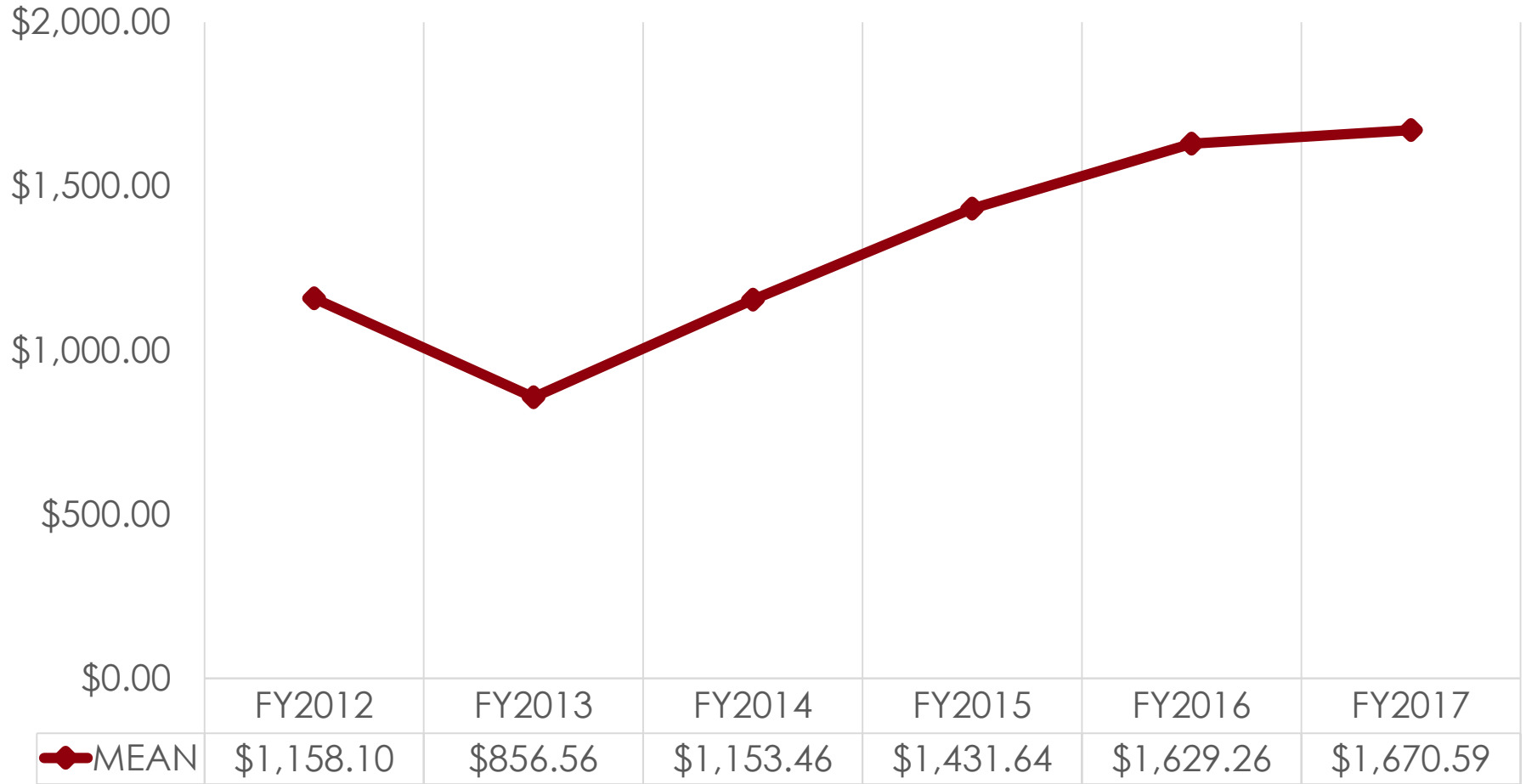
# On-Island – Tracking Other Not Included



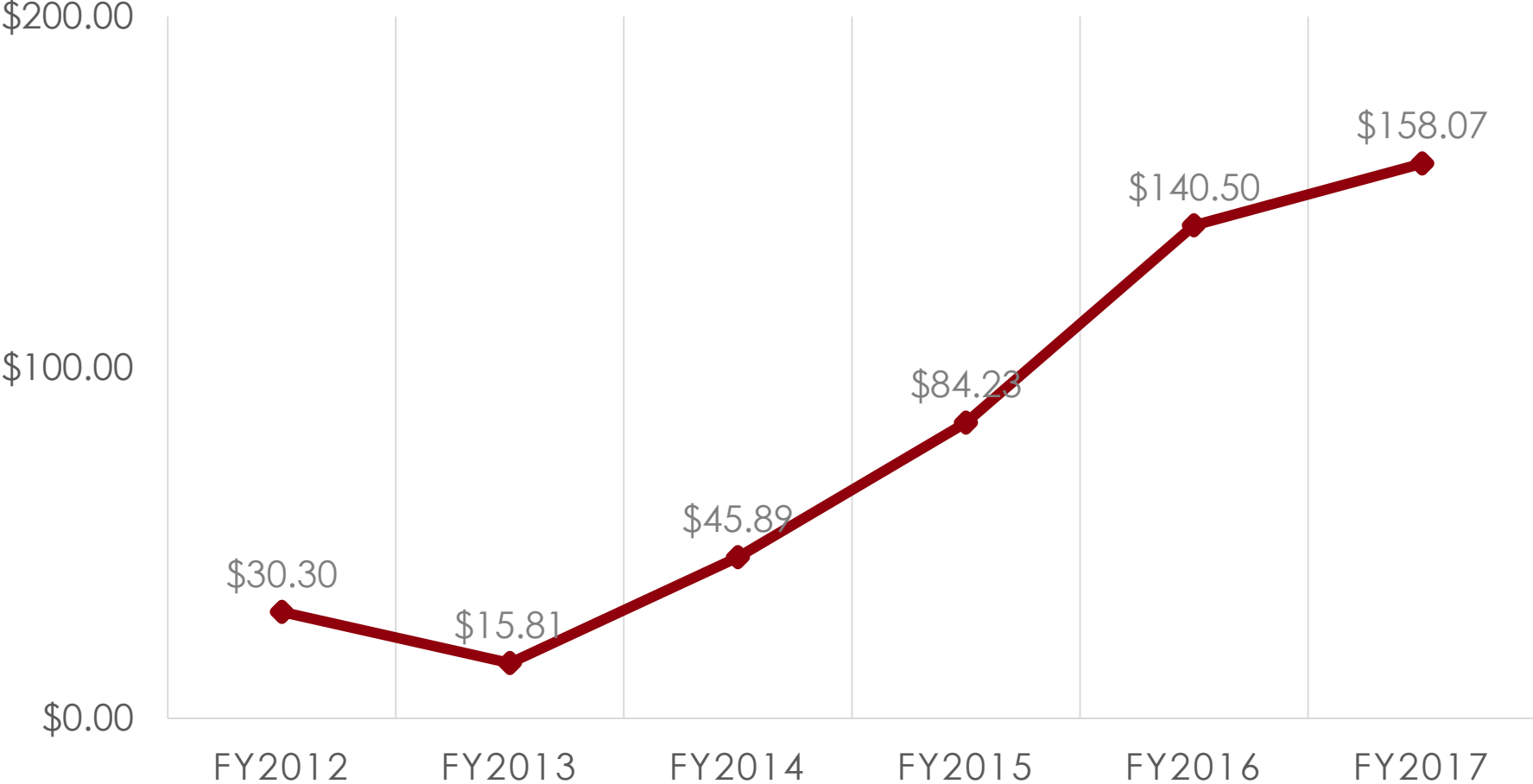
# TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,670.59 = overall mean average prepaid expense by respondent

# TOTAL Per Person Expenditures – Tracking



# GUAM AIRPORT EXPENDITURE – Tracking

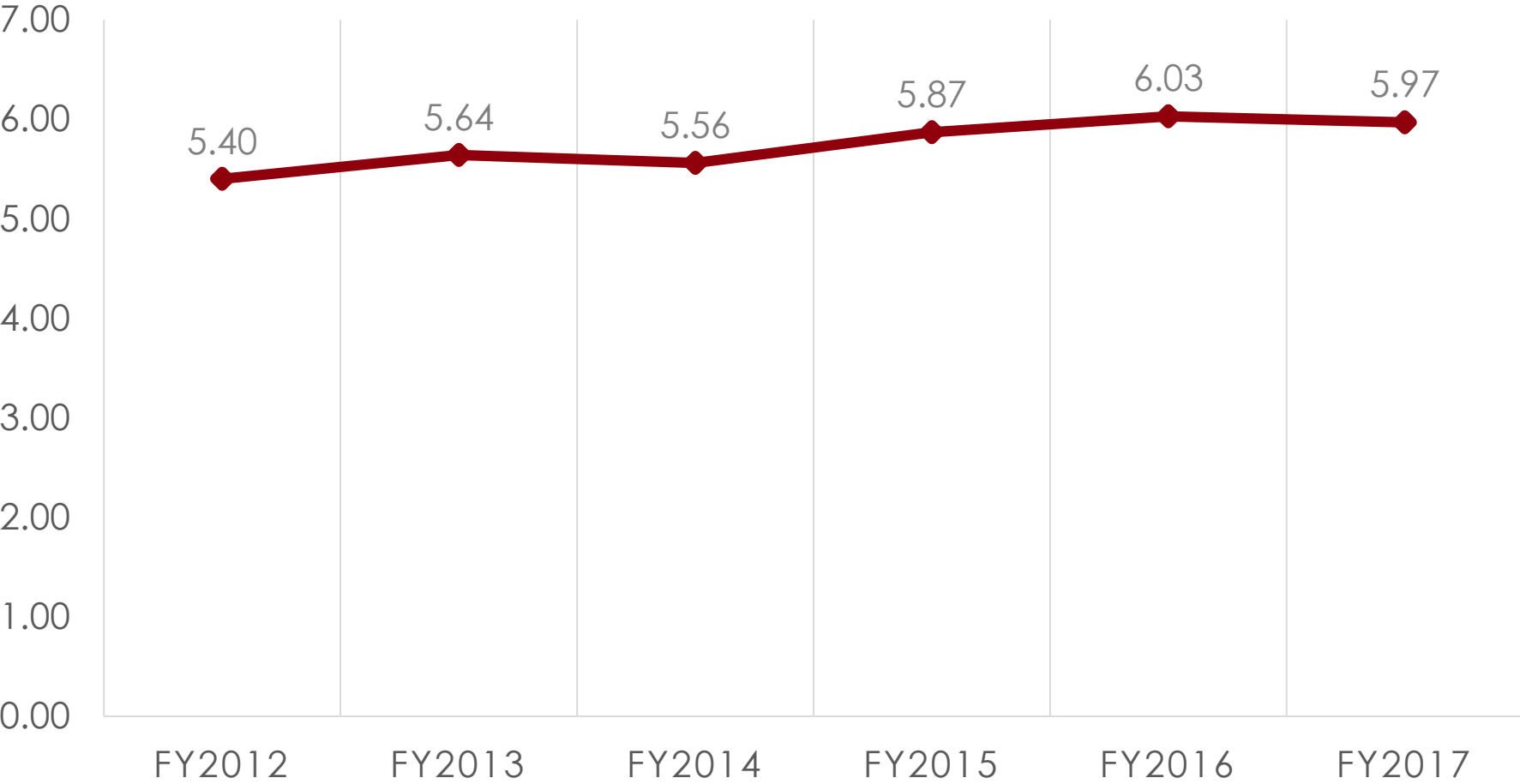


# SECTION 4

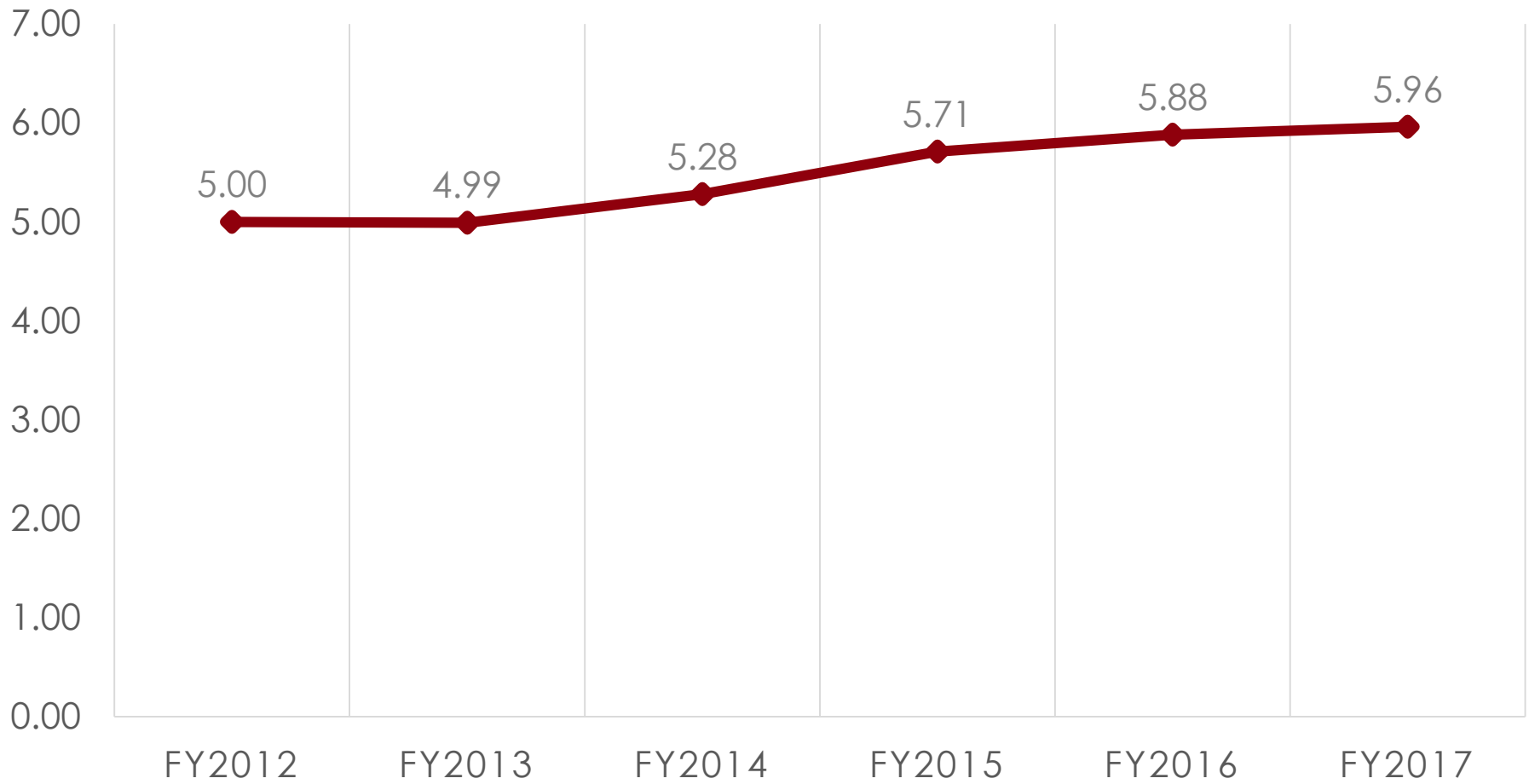
# VISITOR SATISFACTION

# BEHAVIOR

# OVERALL SATISFACTION

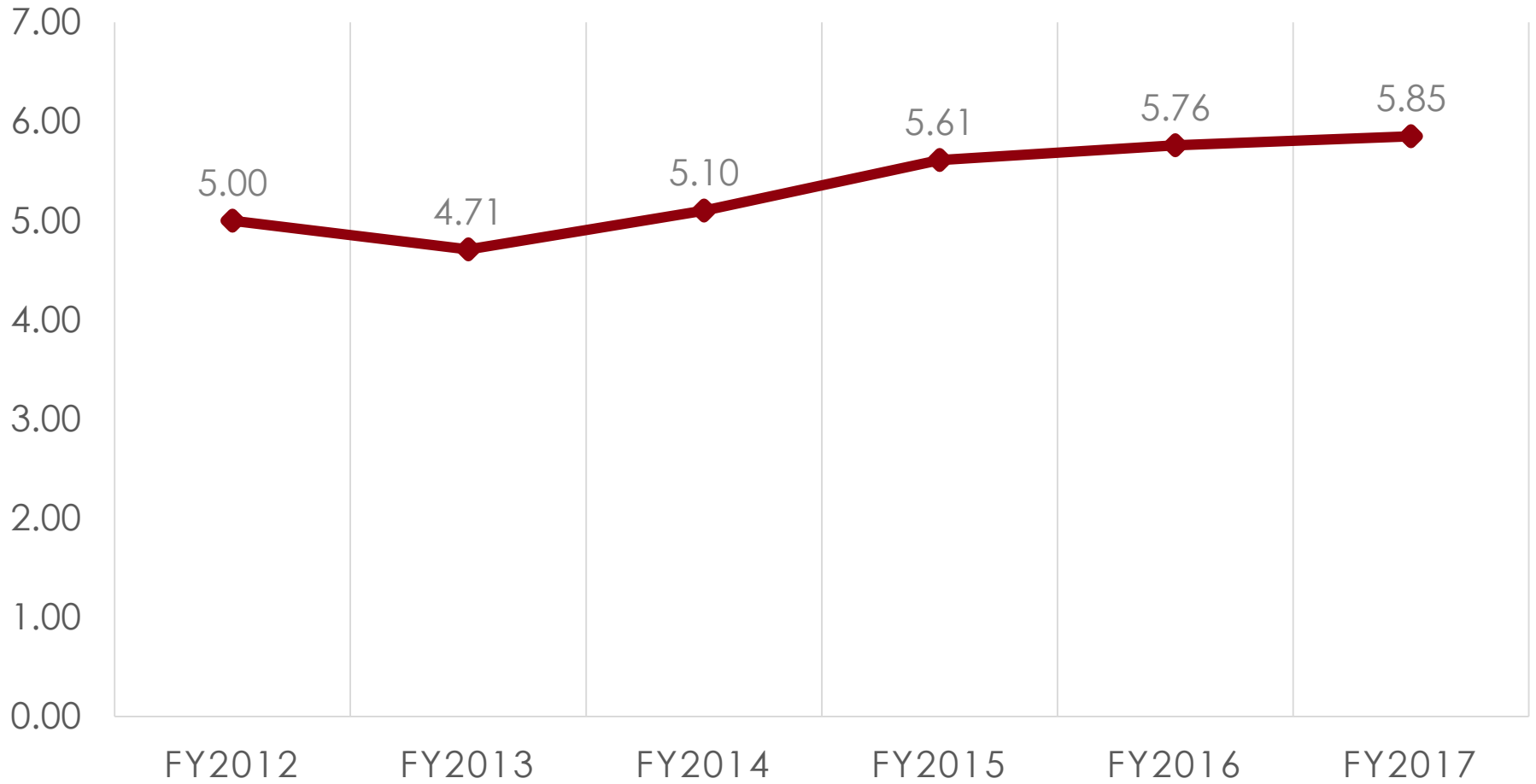


# Guam was better than expected

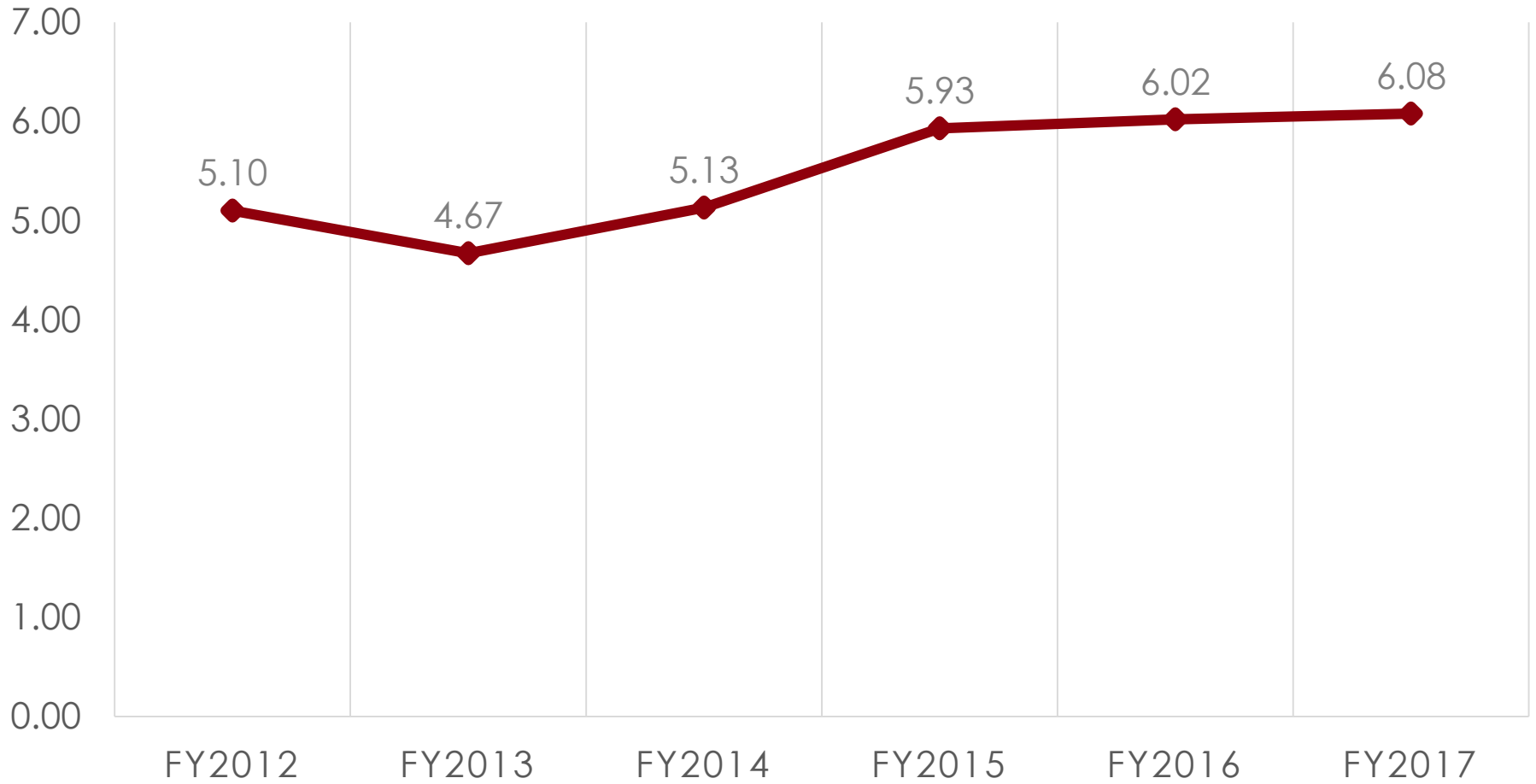




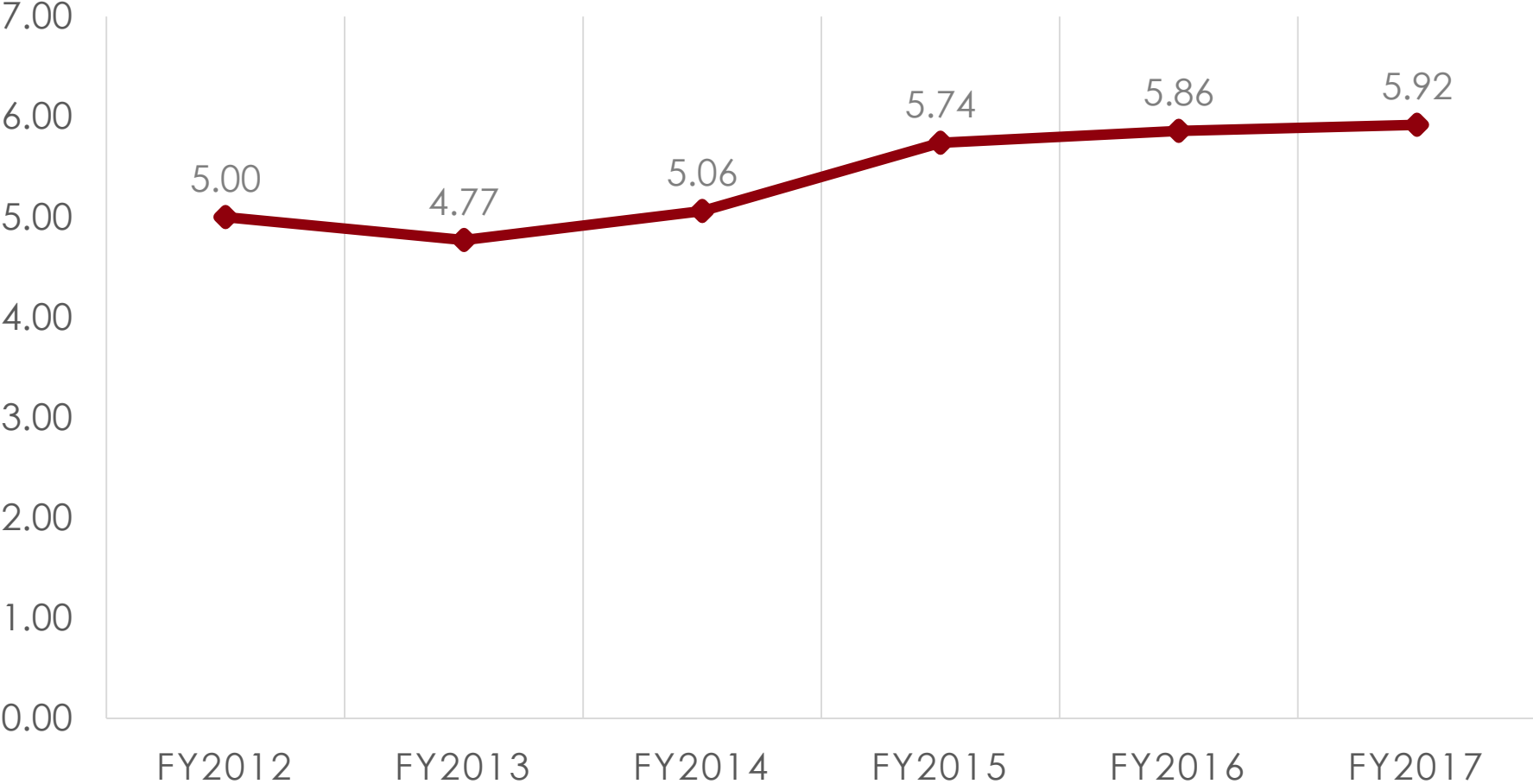
# I had no communication problems



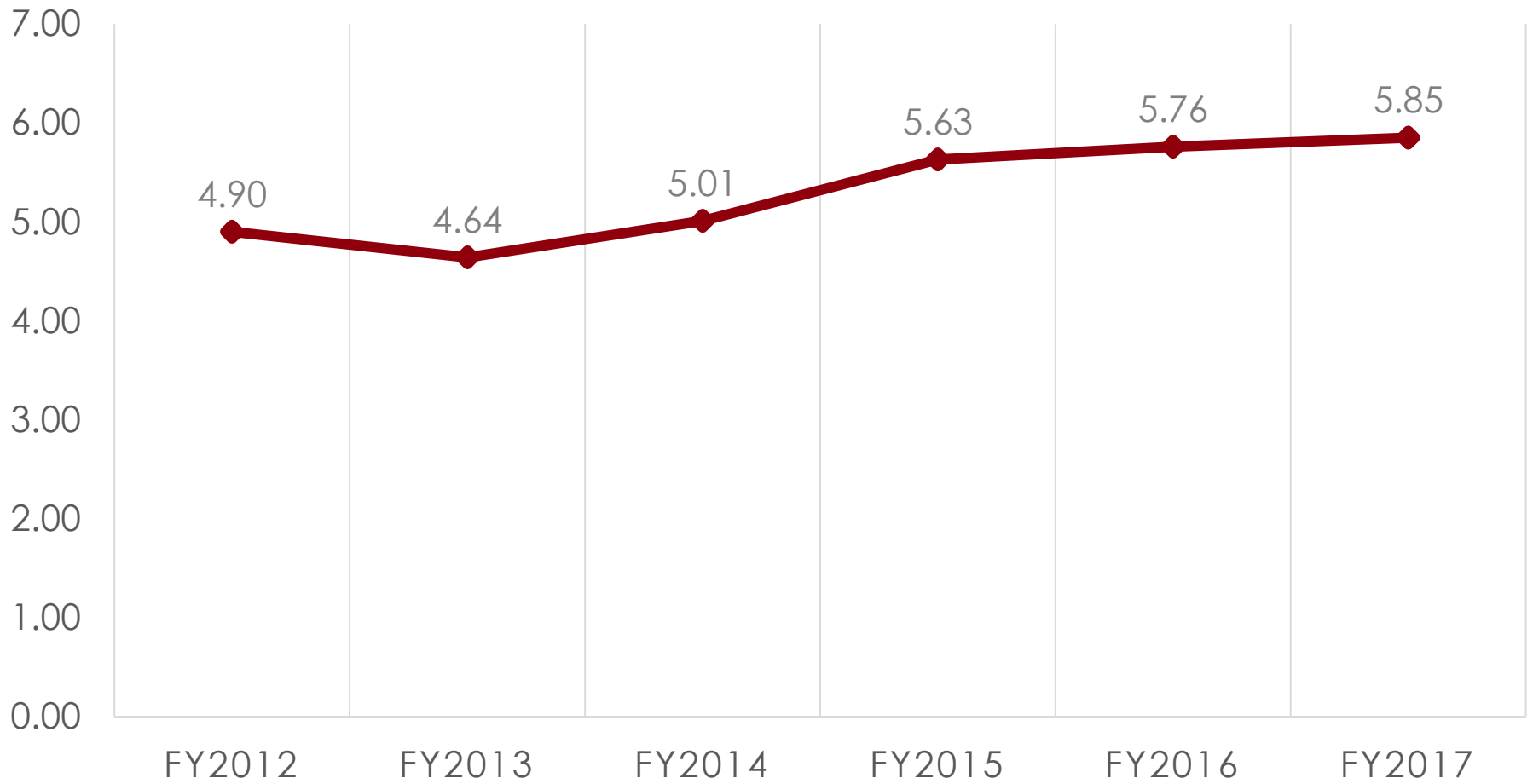
# I will recommend Guam to friends



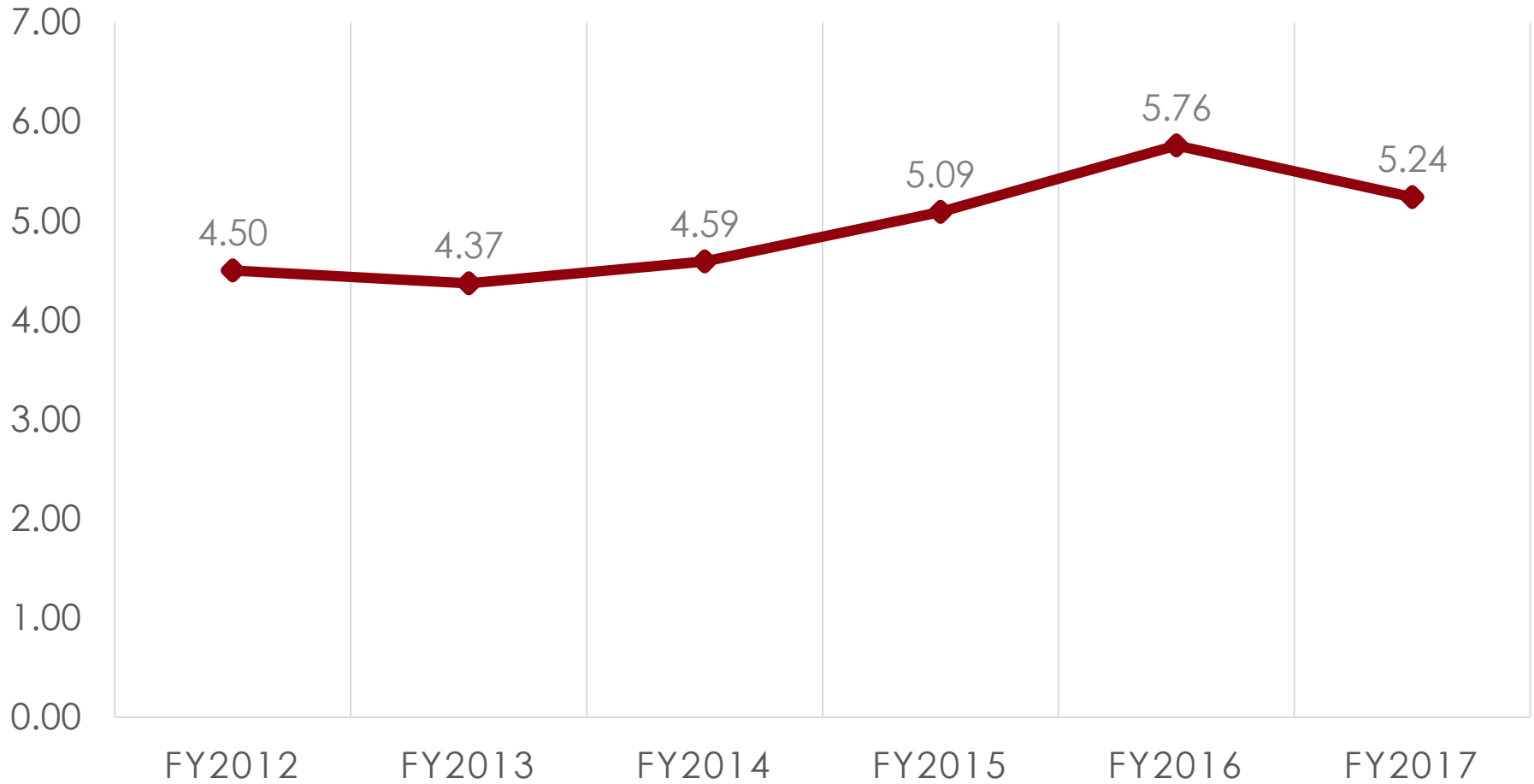
# Sites on Guam were attractive



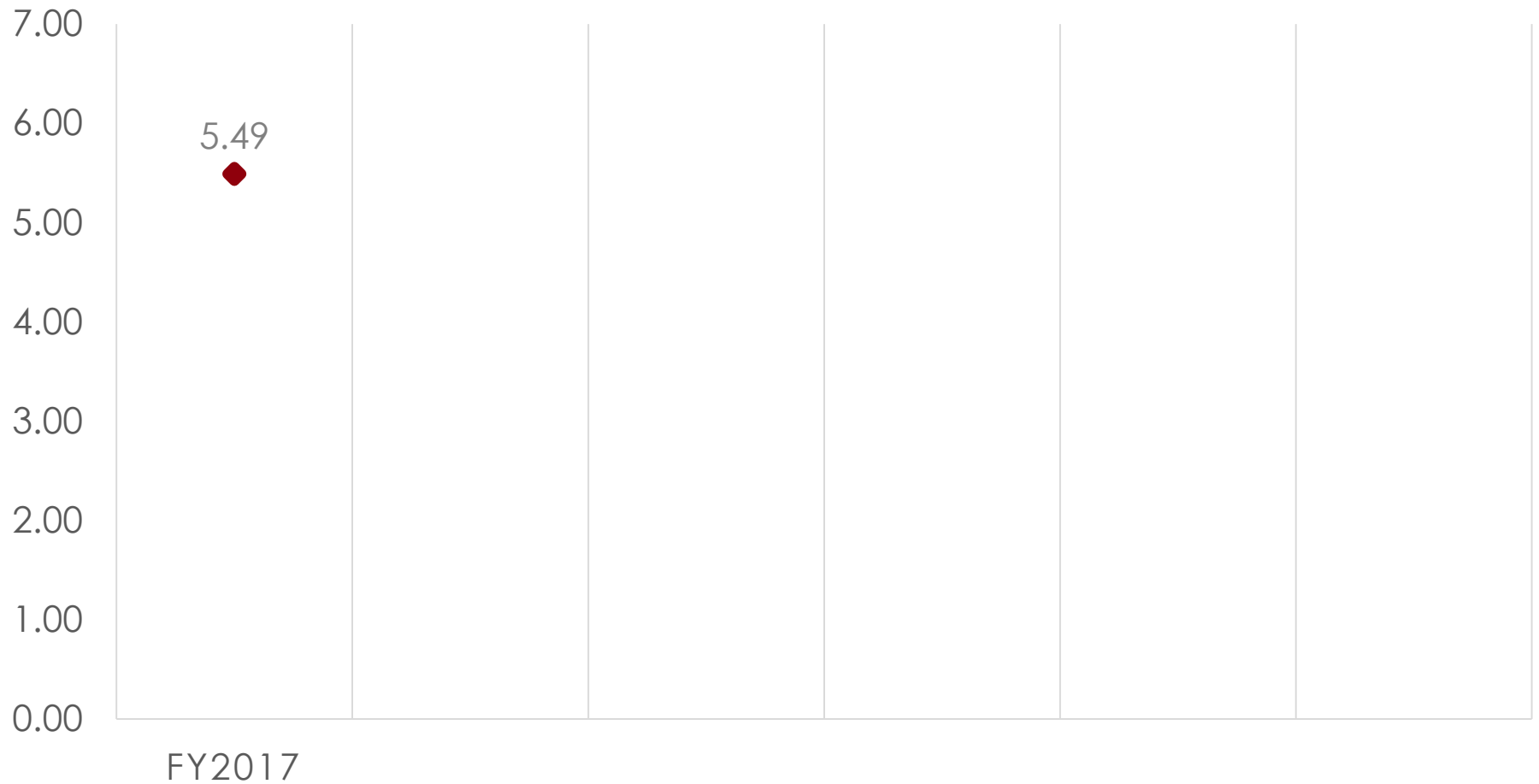
# I plan to visit Guam again



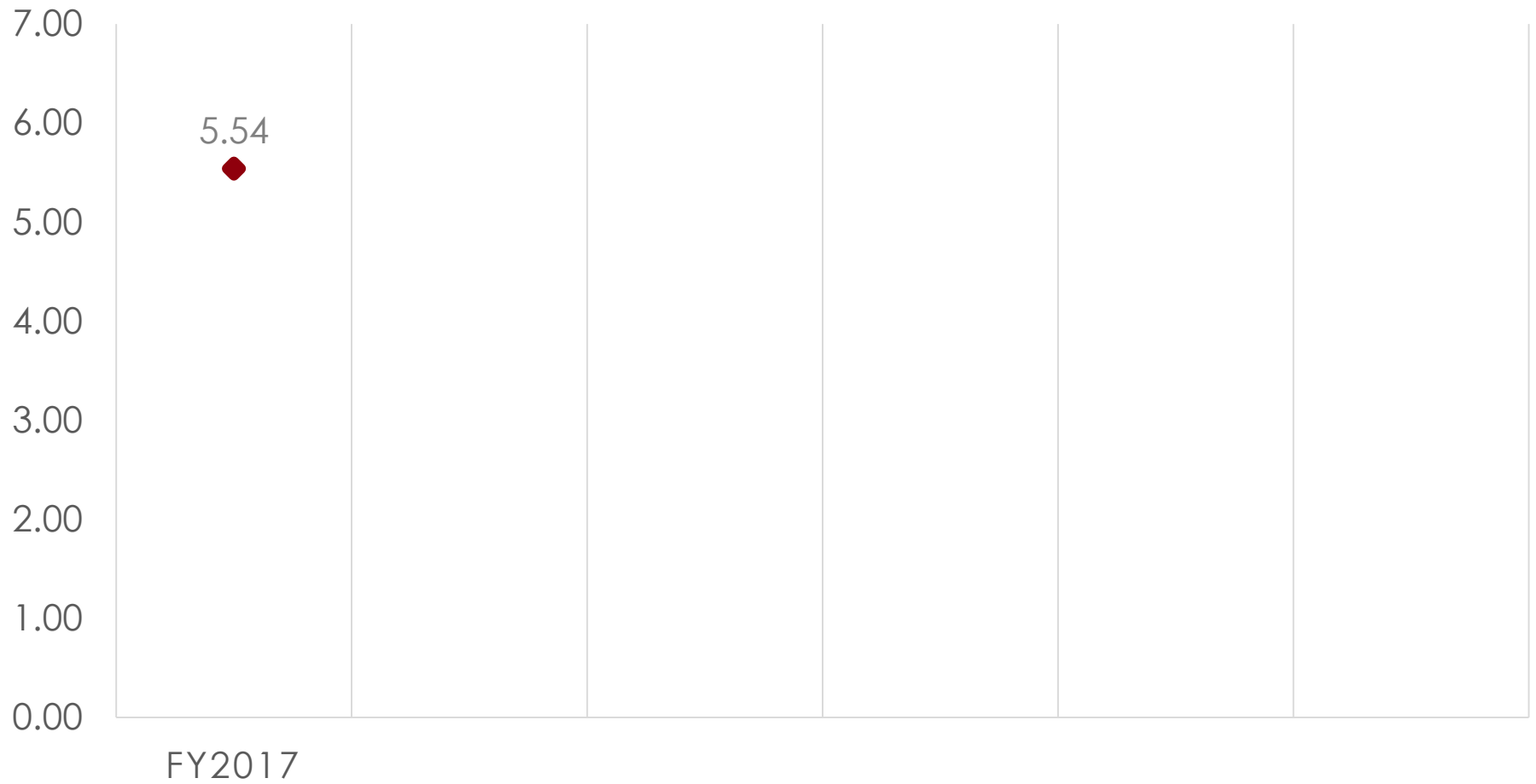
# Not enough night time activities



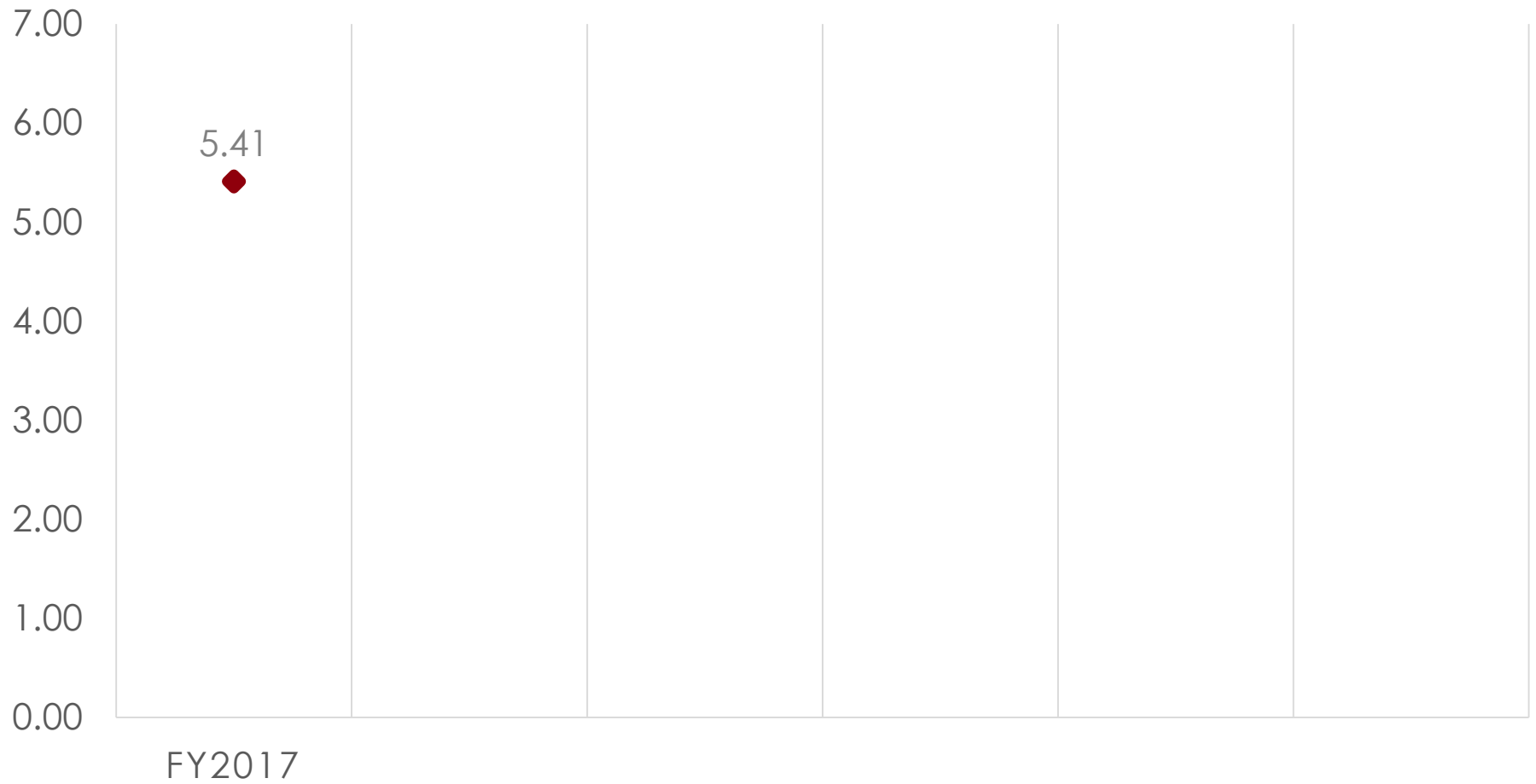
# Tour guides were professional



# Tour drivers were professional

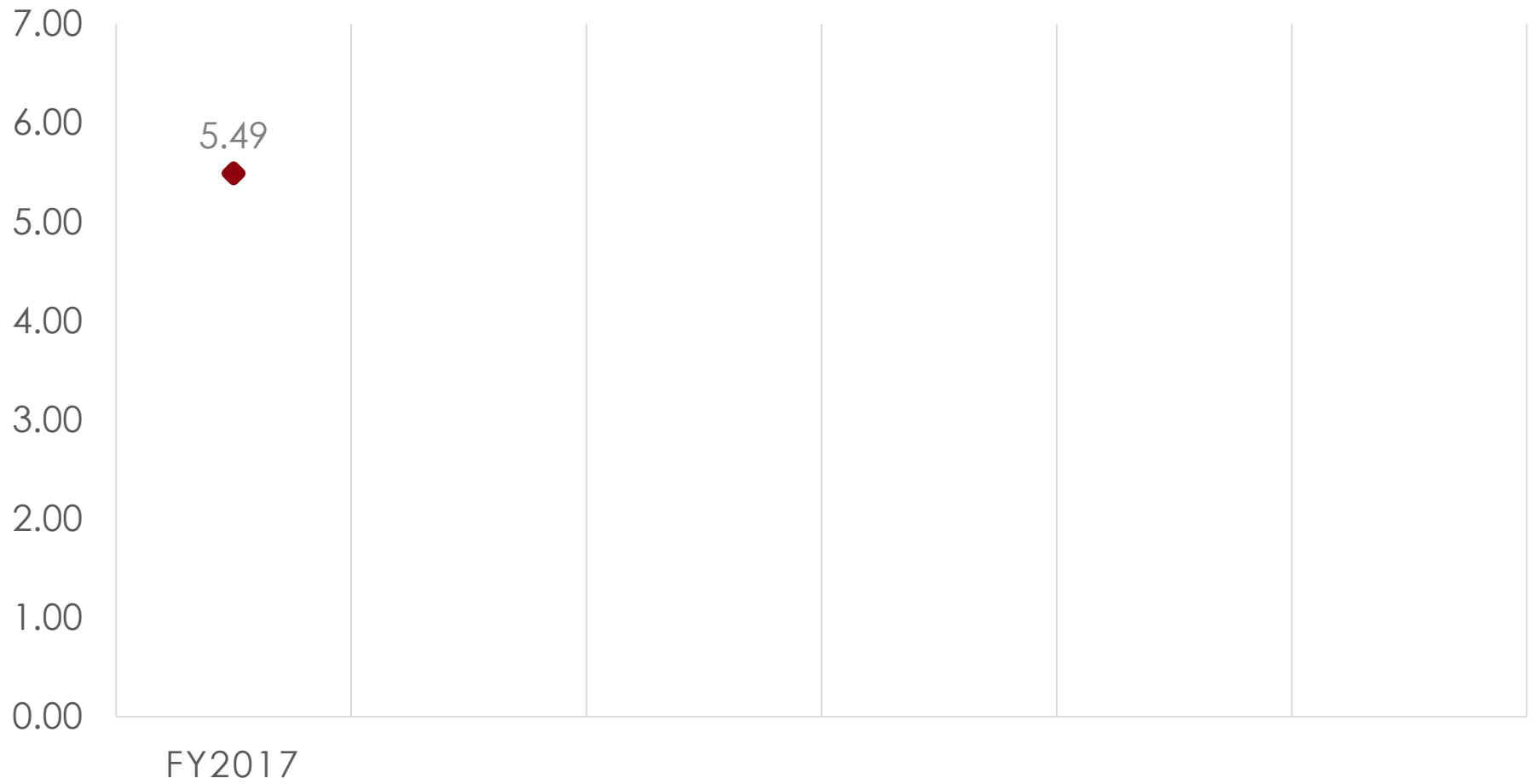


# Taxi drivers were professional

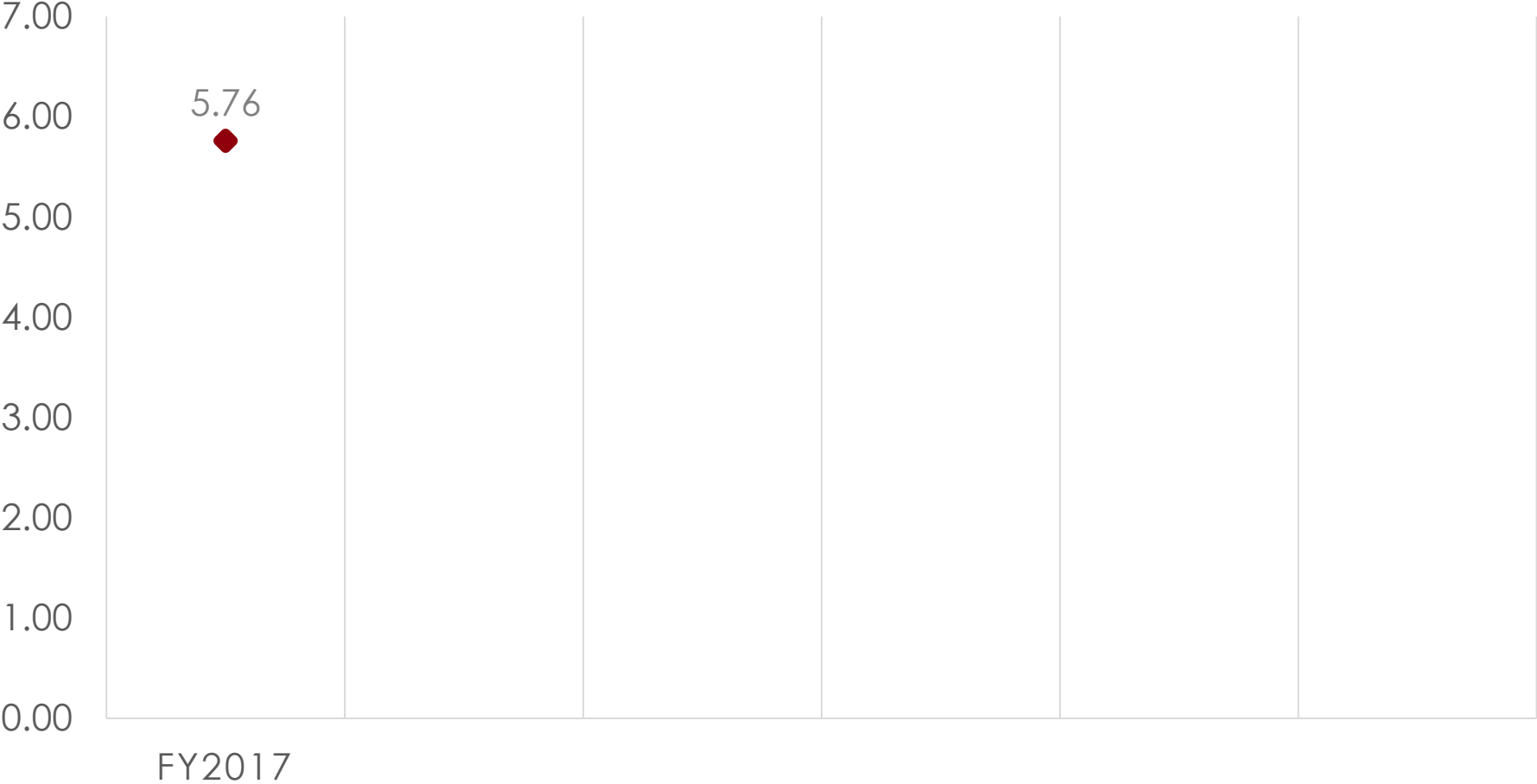




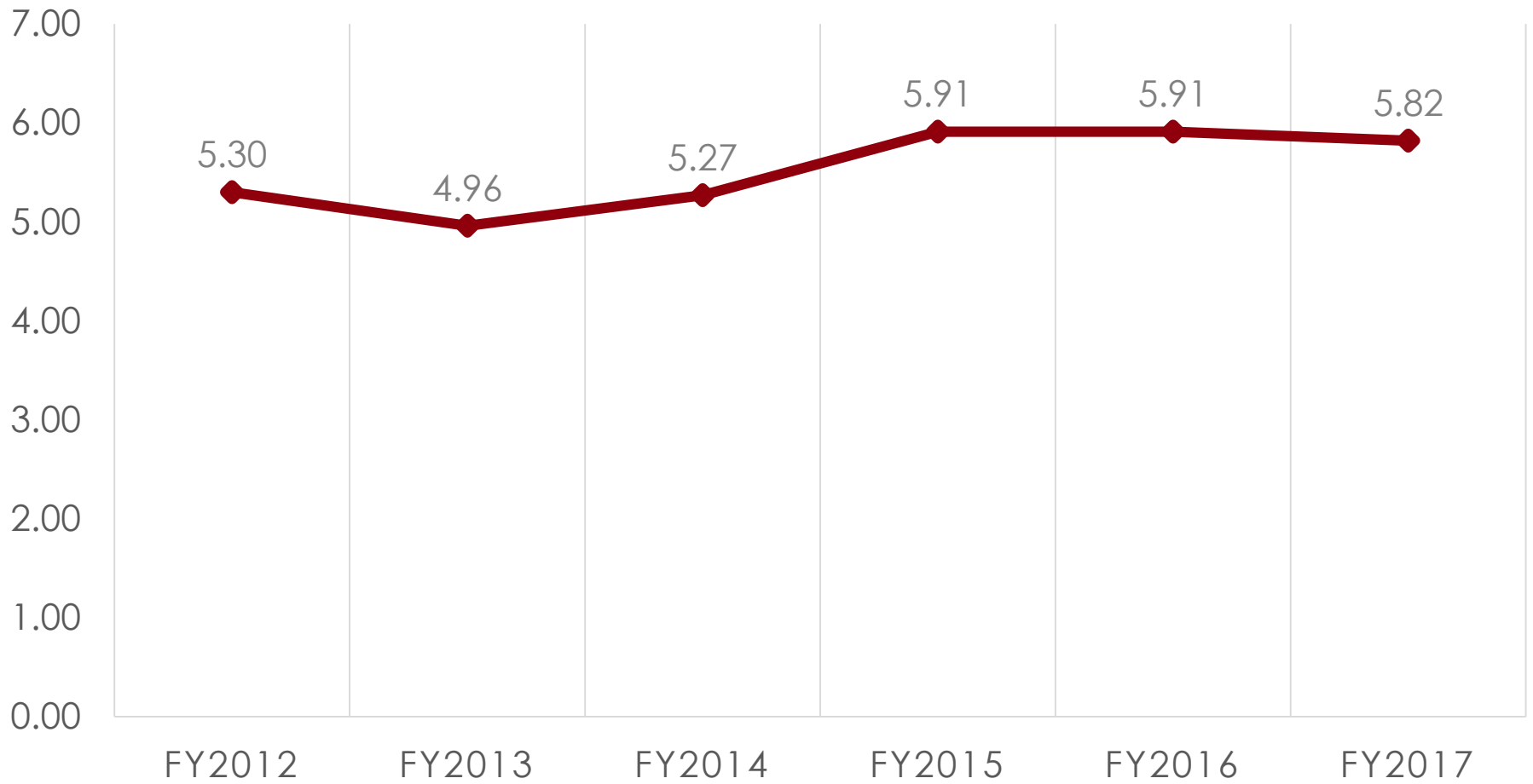
# Taxis were clean



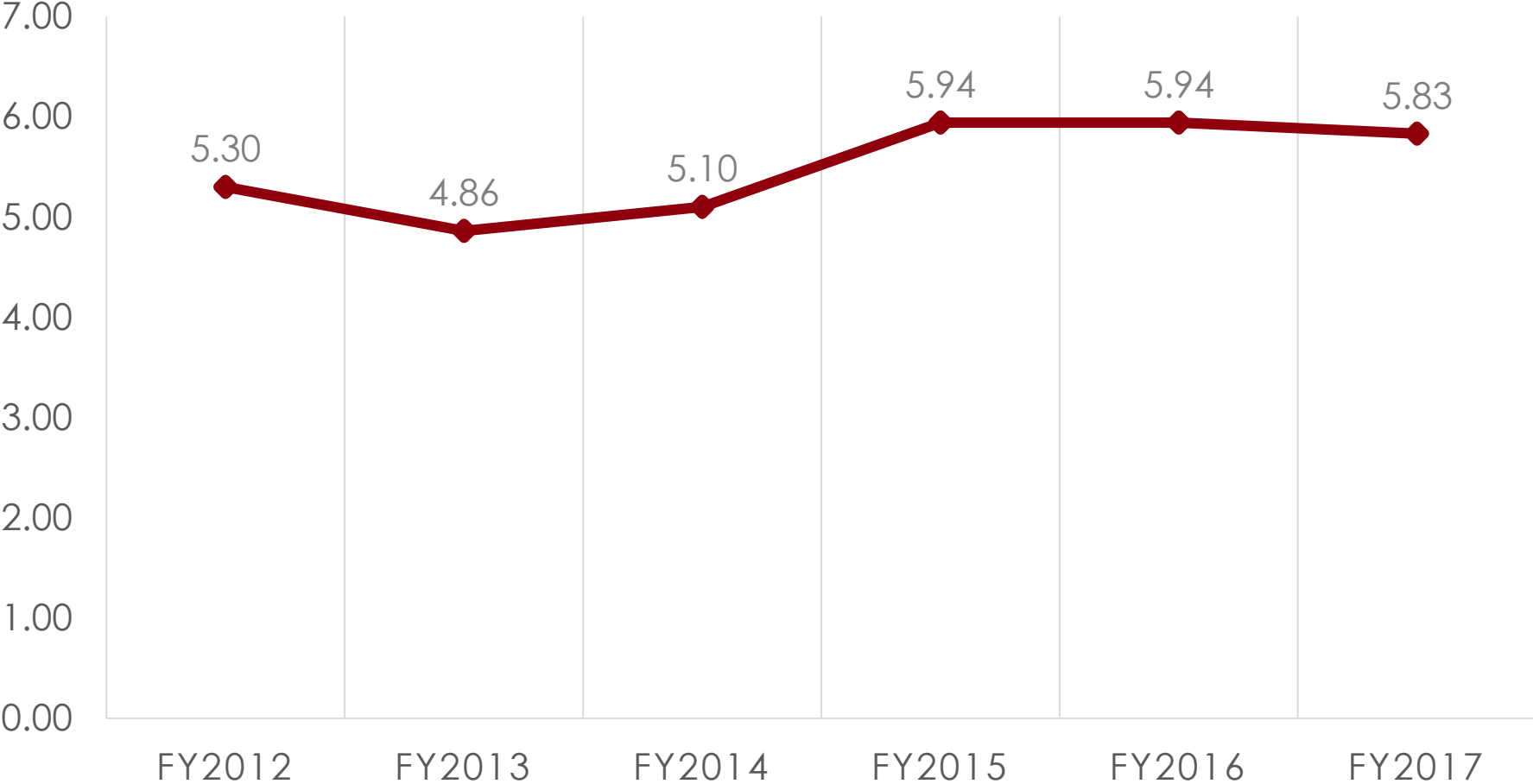
# Guam airport was clean



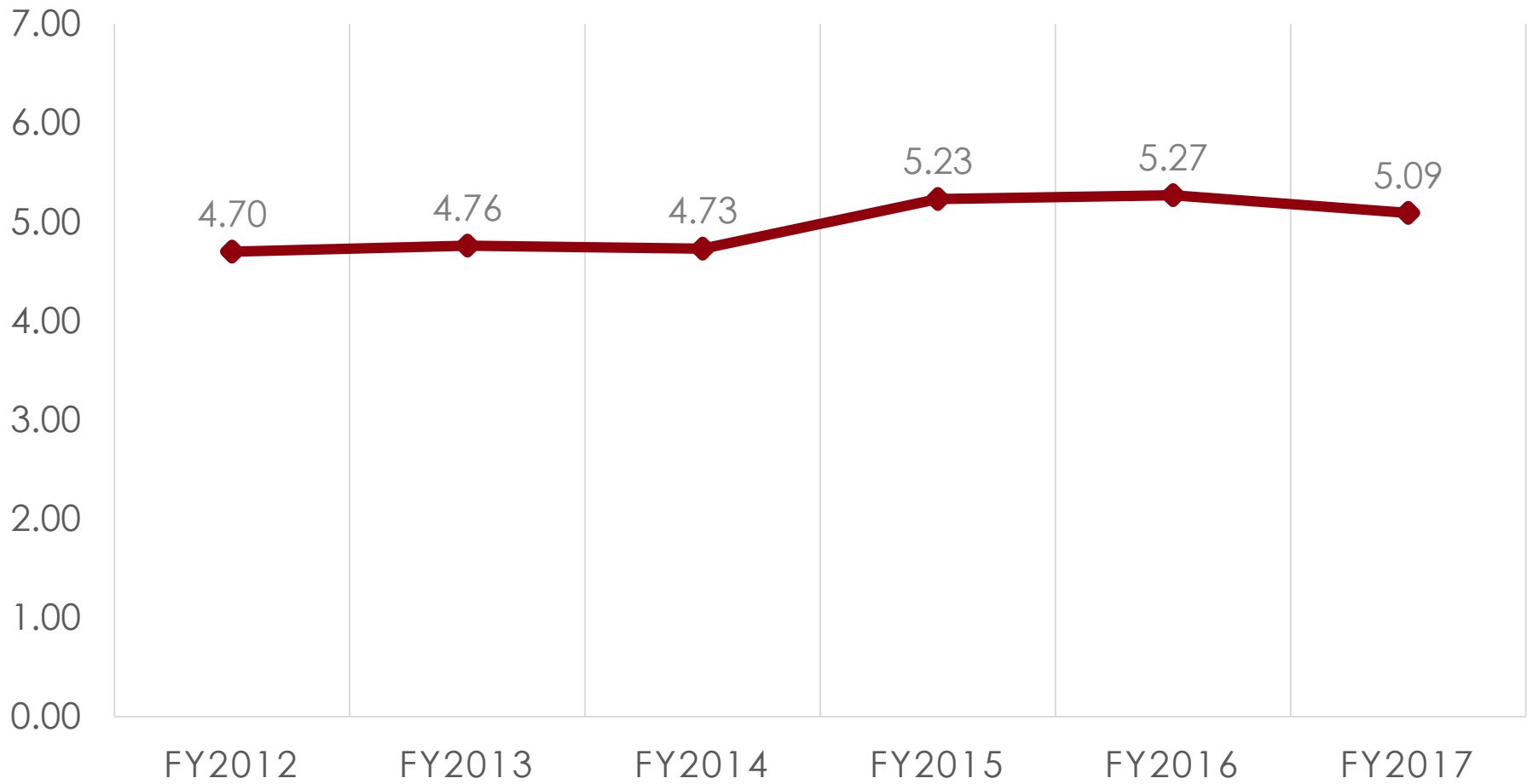
# Ease of getting around



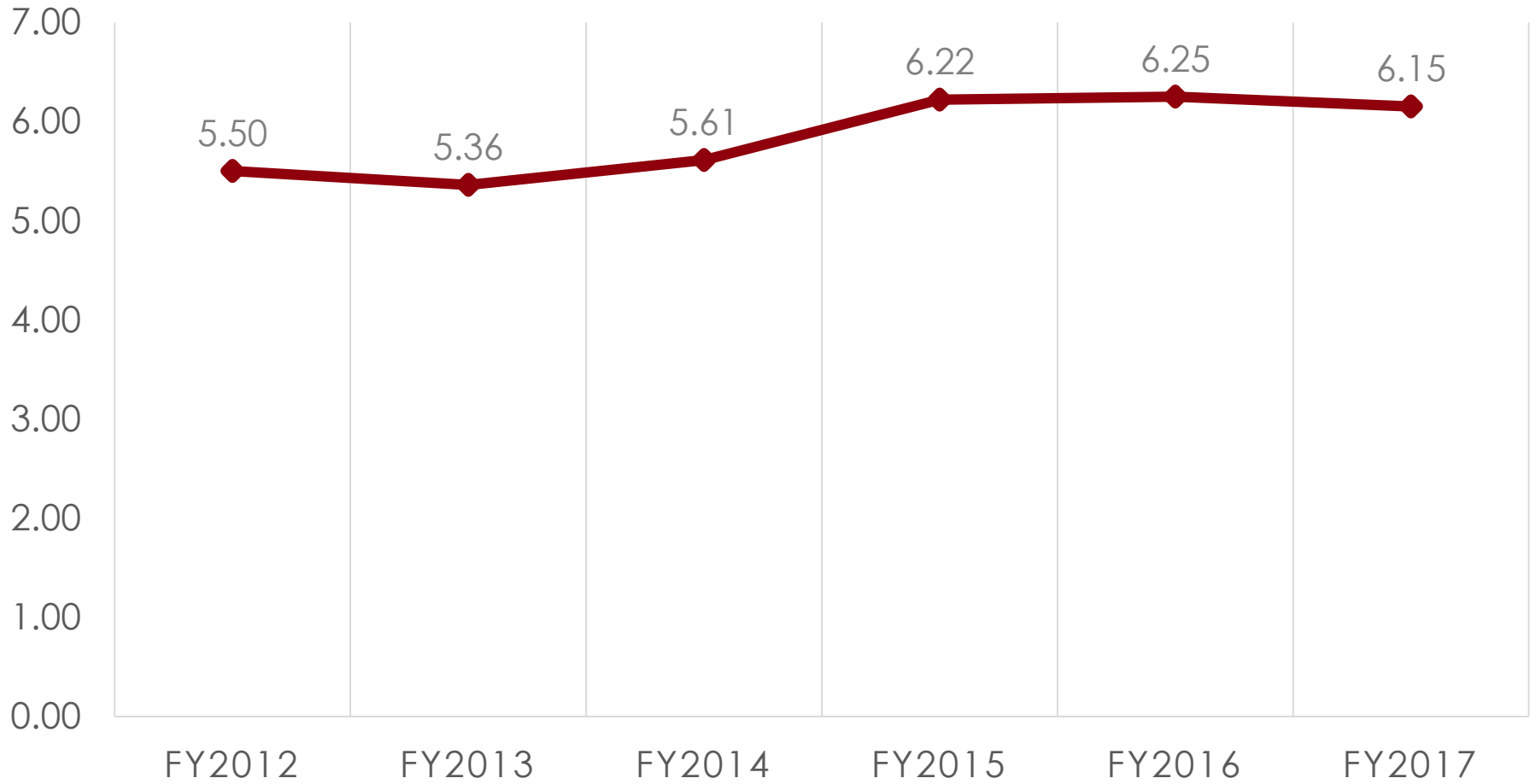
# Safety walking around at night



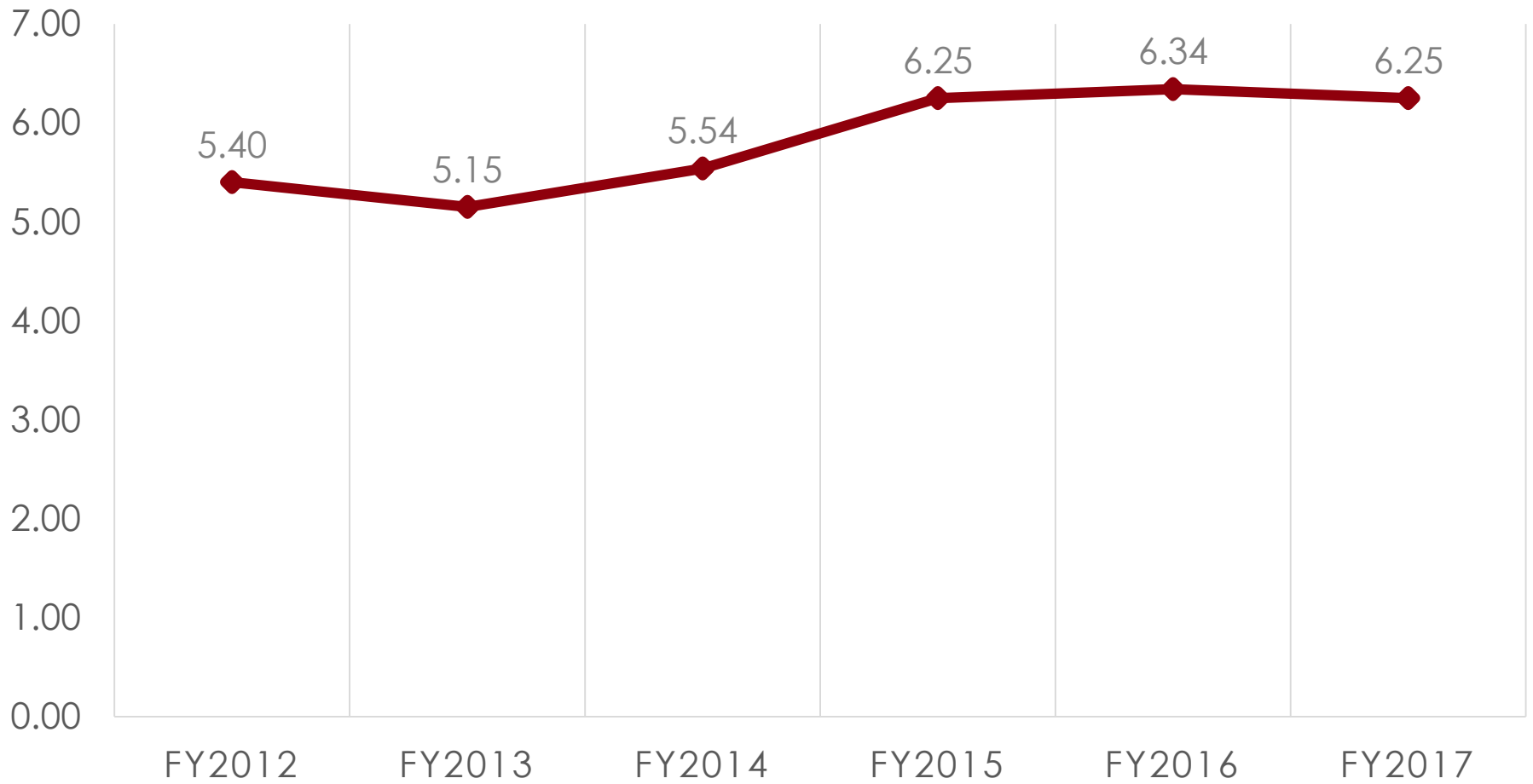
# Price of things on Guam



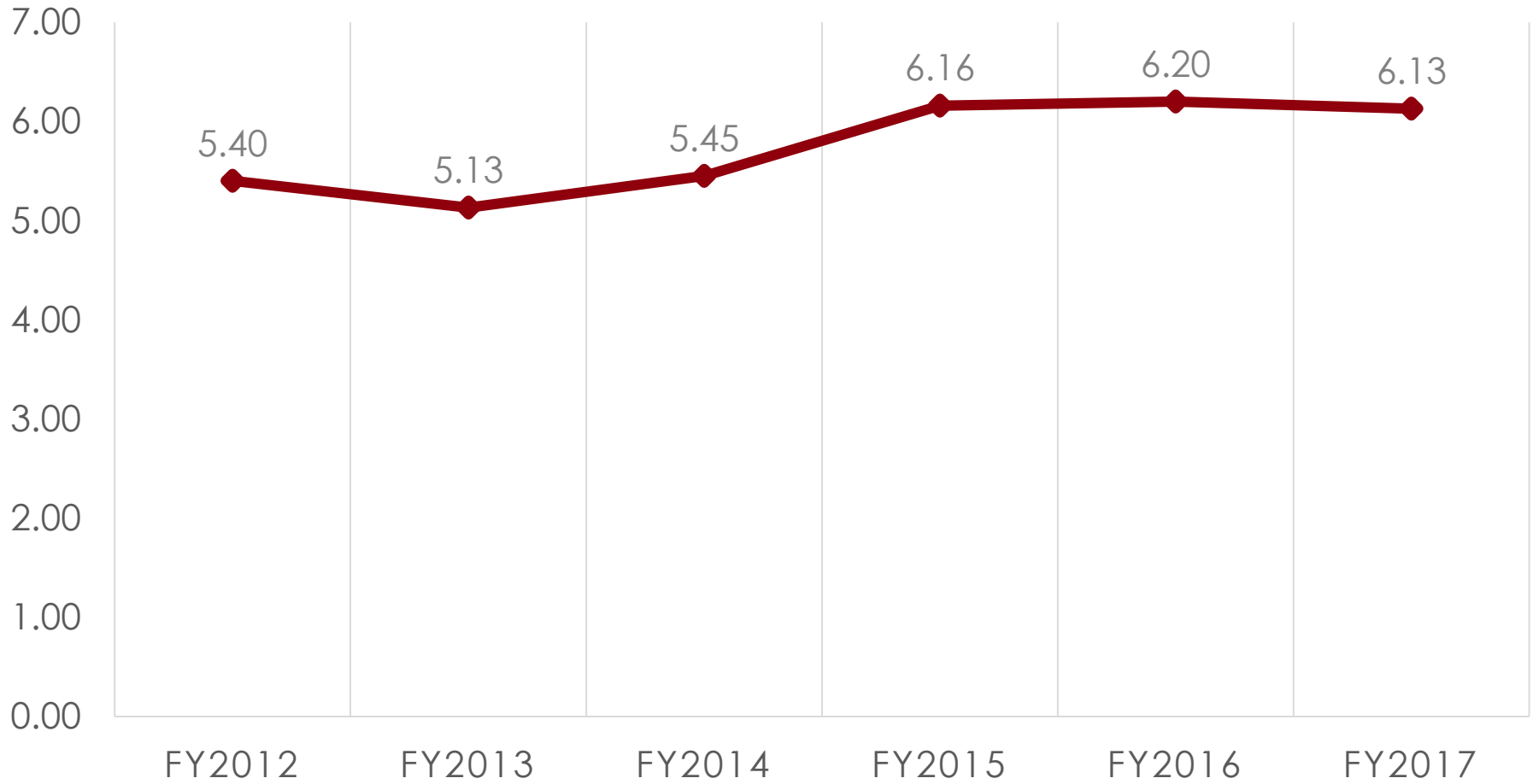
# Quality/ Cleanliness- beach, ocean



# Quality/ Cleanliness- air, sky

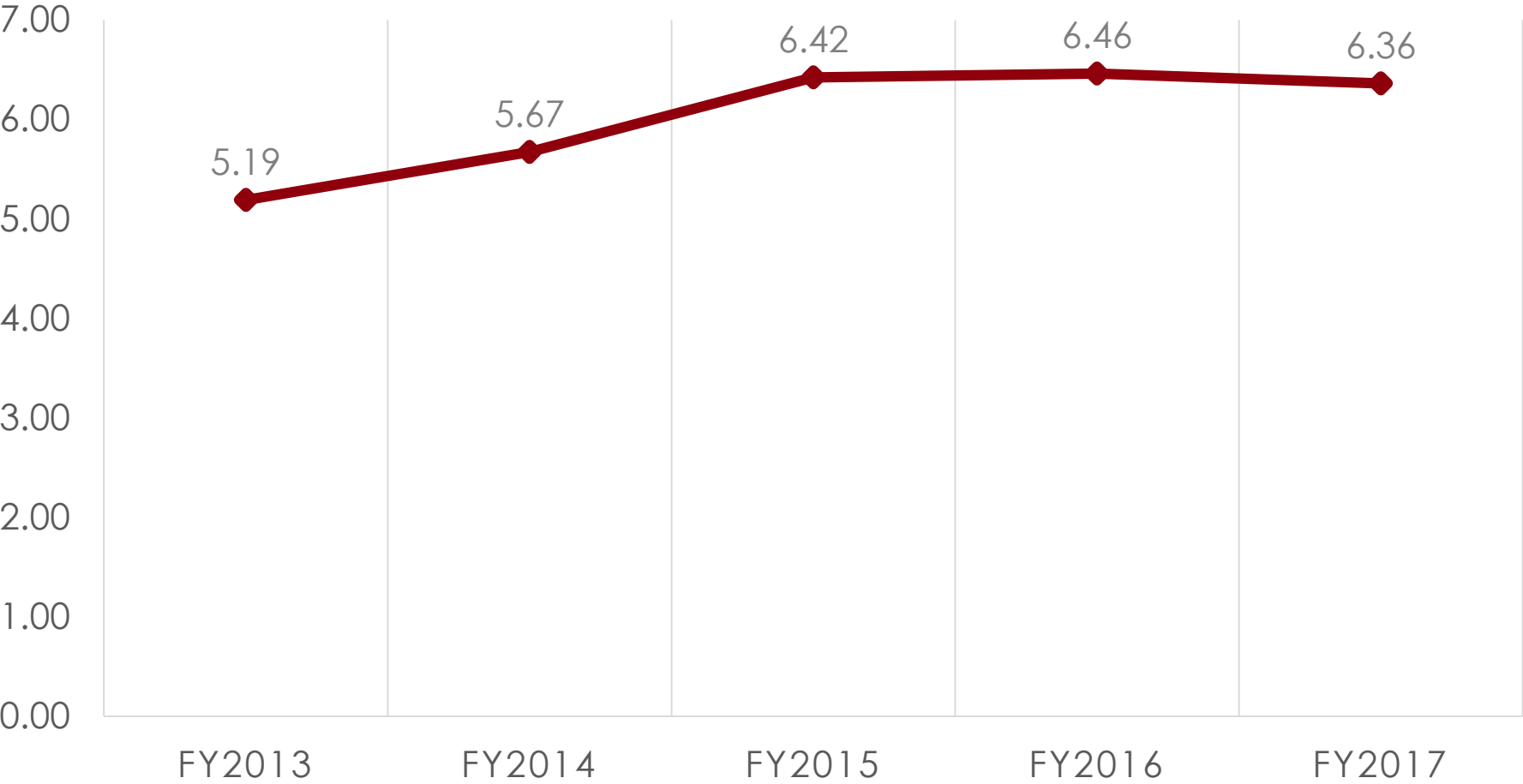


# Quality/ Cleanliness- parks

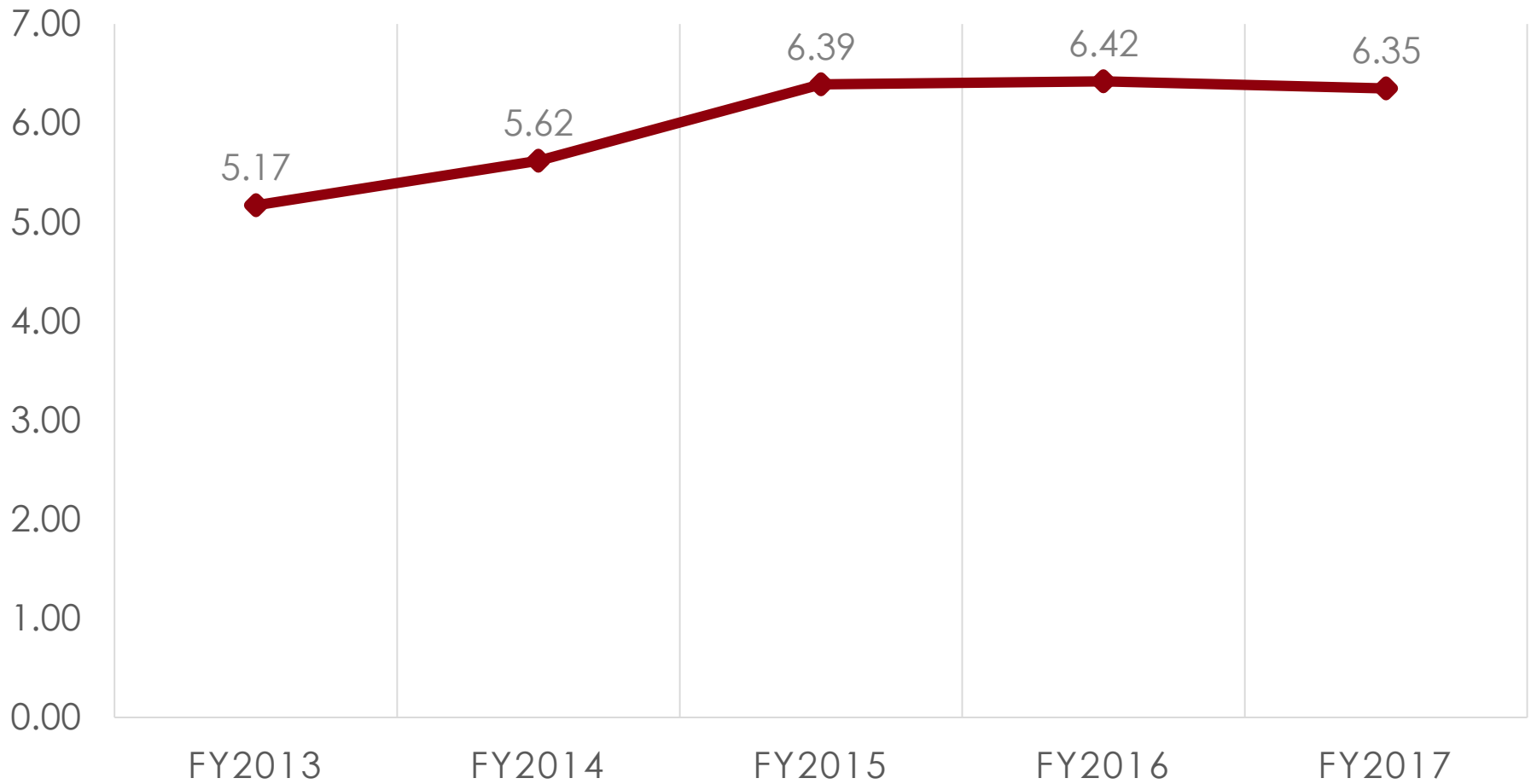




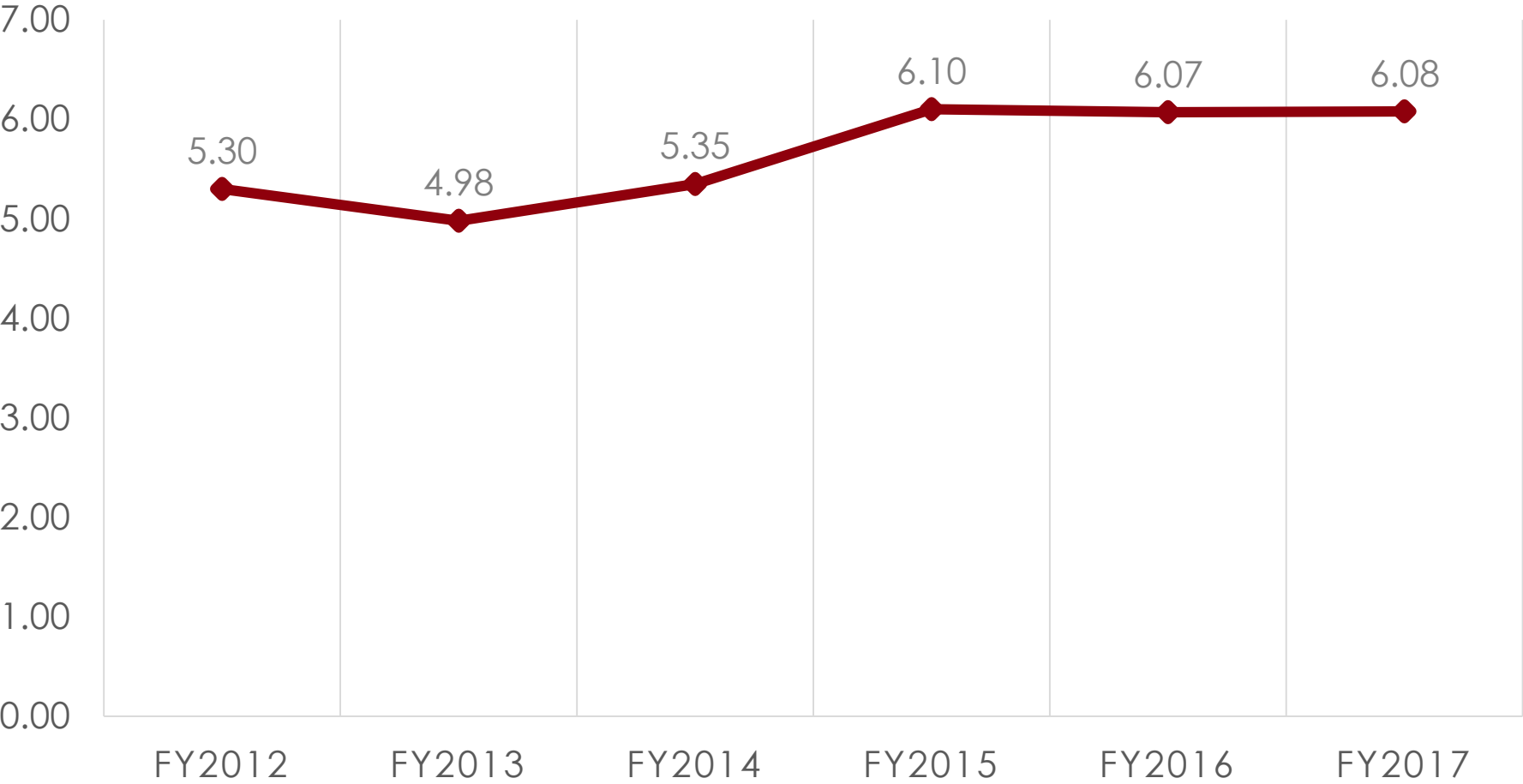
# Quality- landscape Tumon



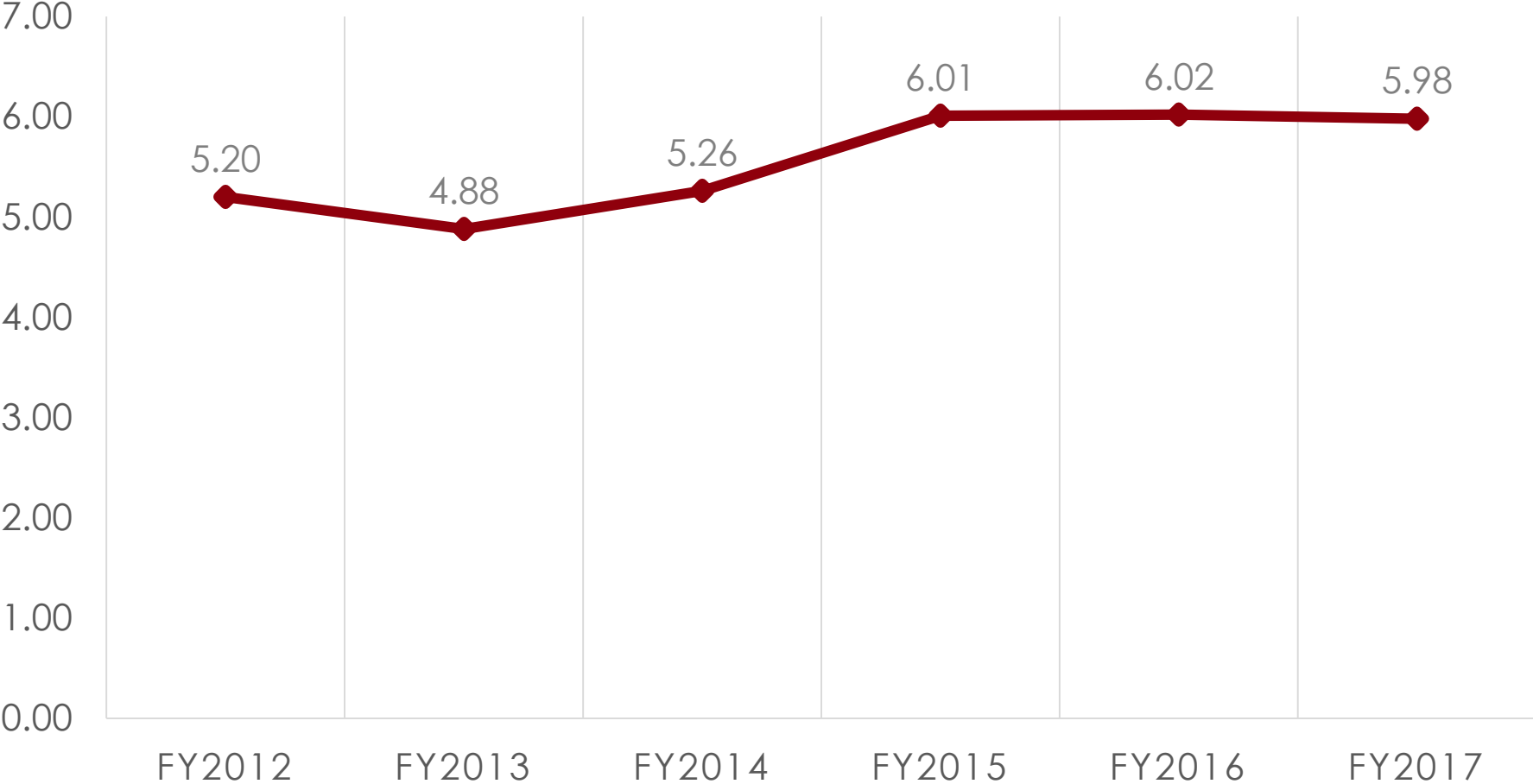
# Quality- landscape Guam



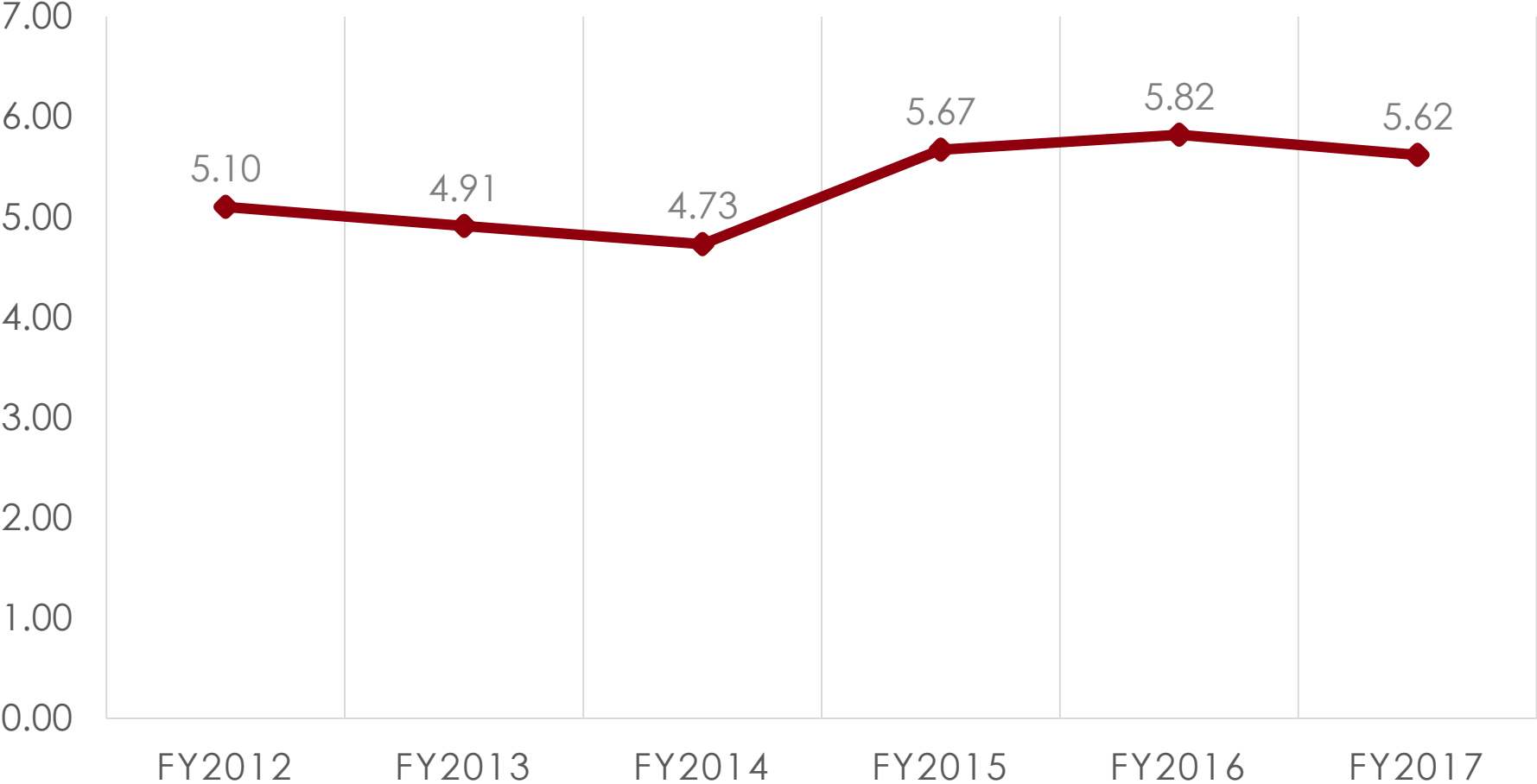
# Quality- ground handler



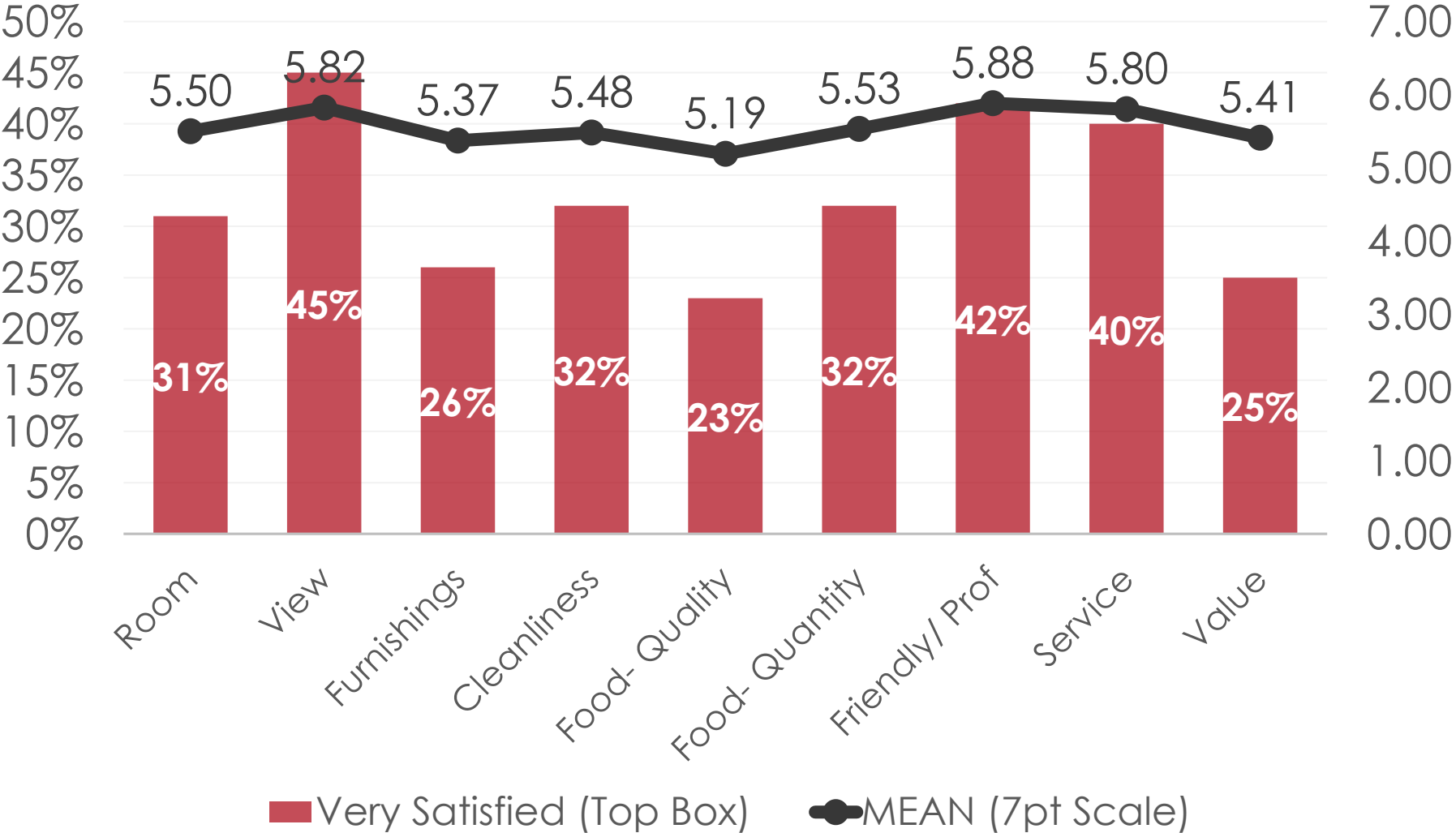
# Quality/ Cleanliness- transportation vehicle



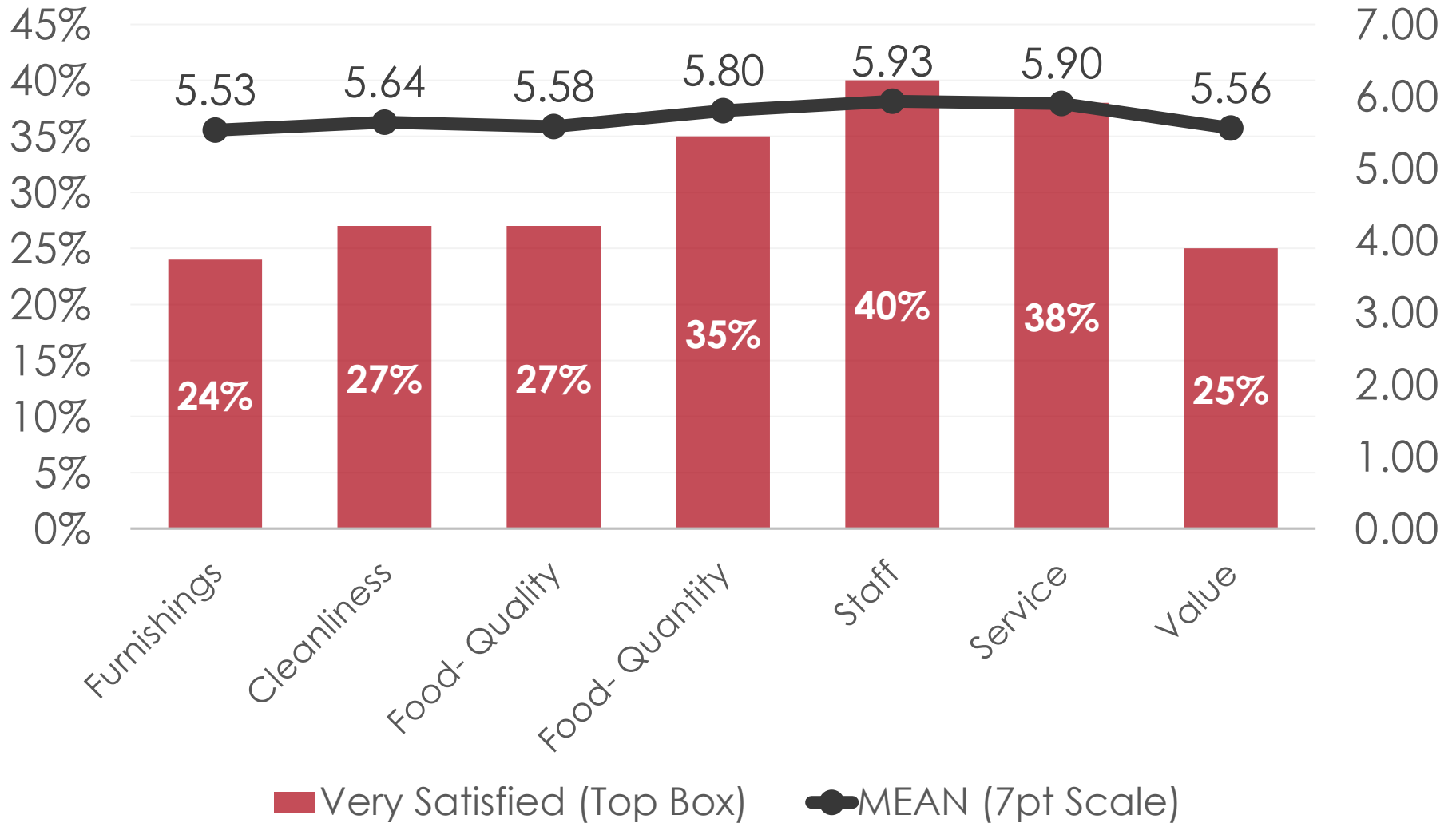
# ACCOMMODATIONS OVERALL SATISFACTION



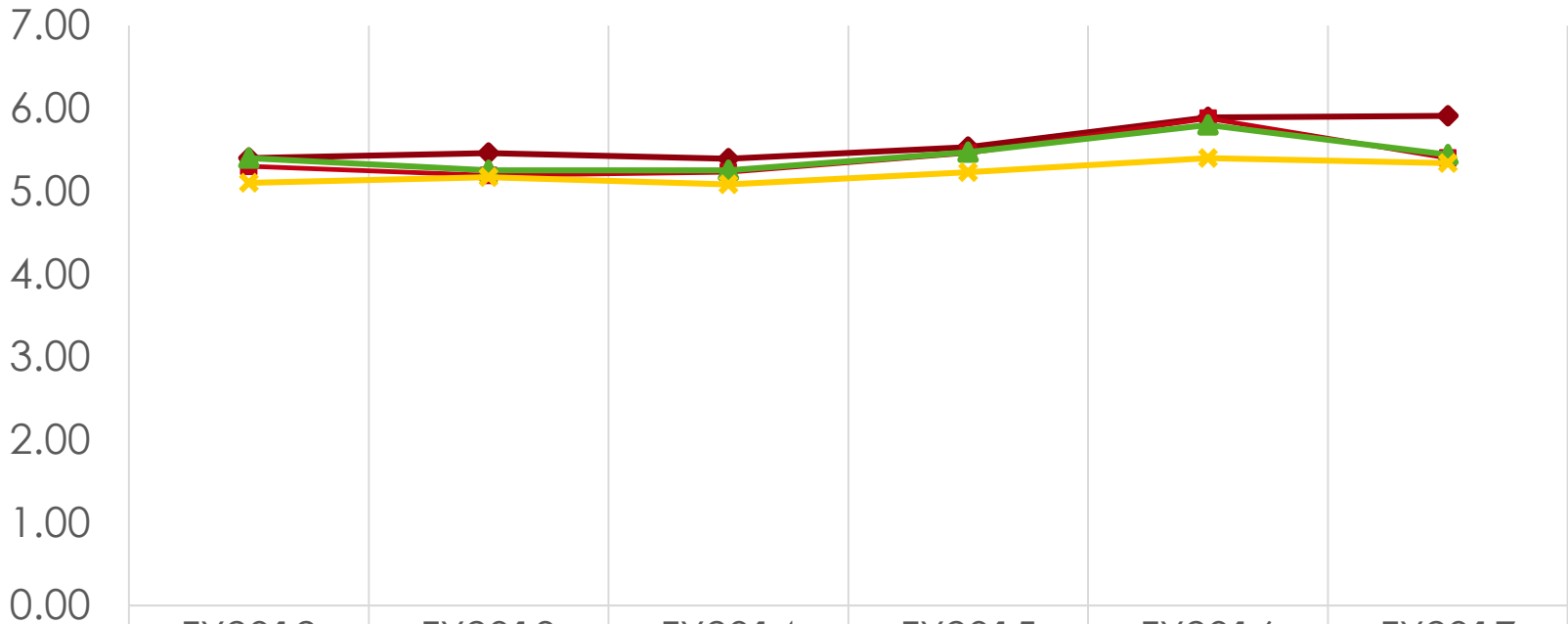
# ACCOMMODATIONS – Satisfaction by Category



# DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



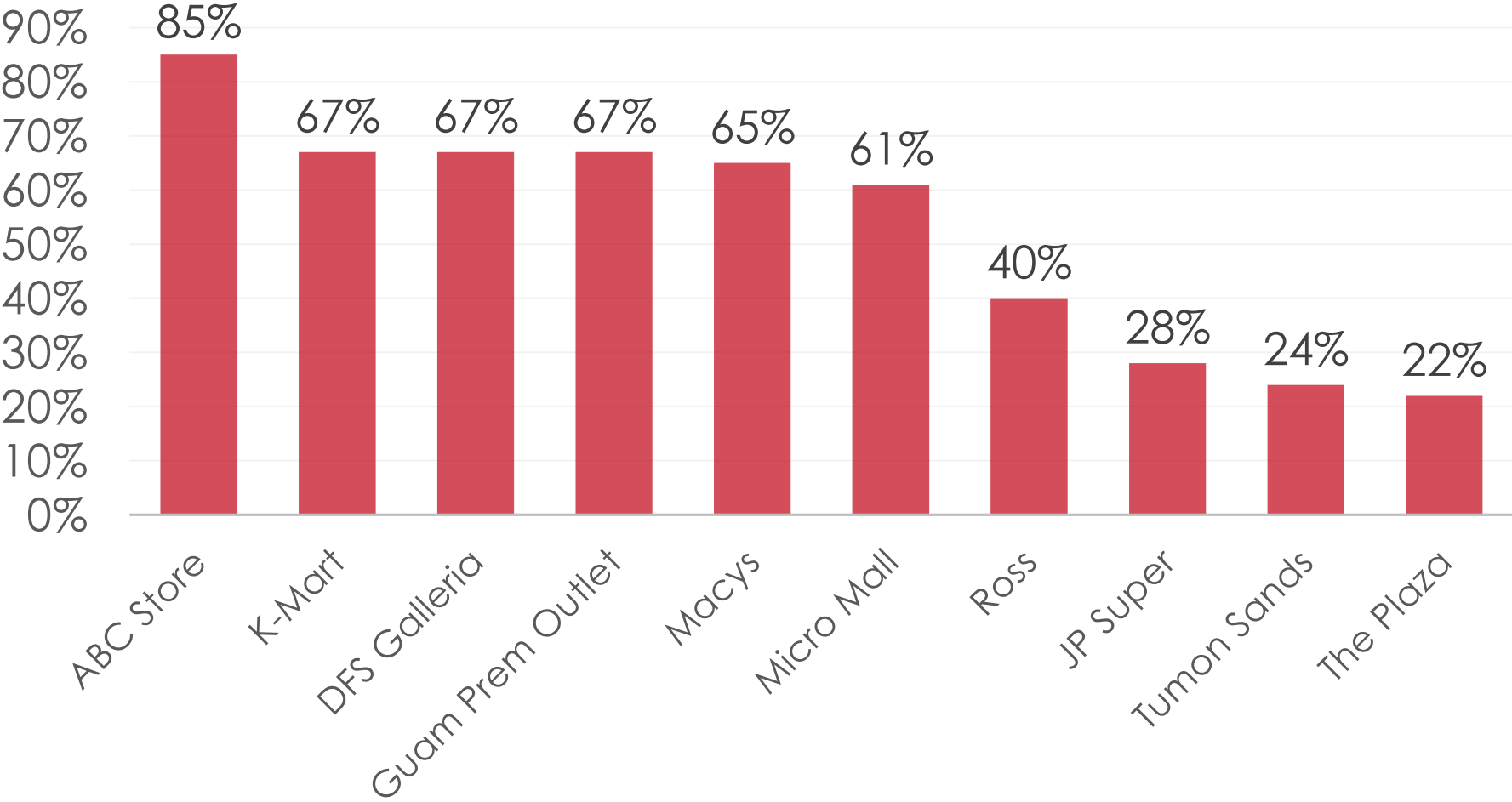
# WEDDINGS - SATISFACTION



◆ Facility	5.40	5.46	5.39	5.53	5.89	5.91
■ Staff	5.30	5.19	5.23	5.46	5.88	5.40
▲ Services	5.40	5.25	5.25	5.47	5.80	5.44
✱ Packages	5.10	5.17	5.08	5.23	5.40	5.34



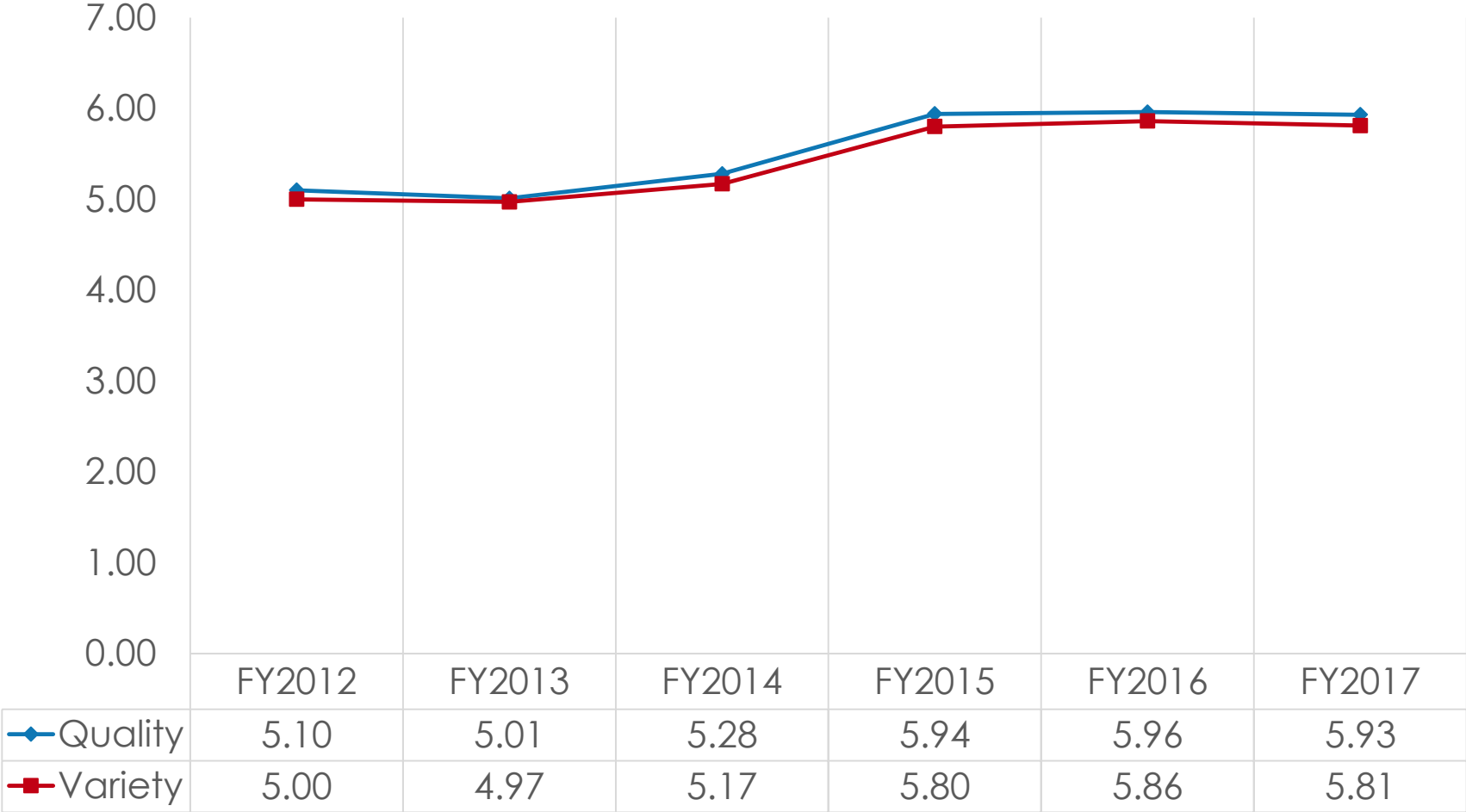
# Shopping Malls/ Stores (Top Responses)



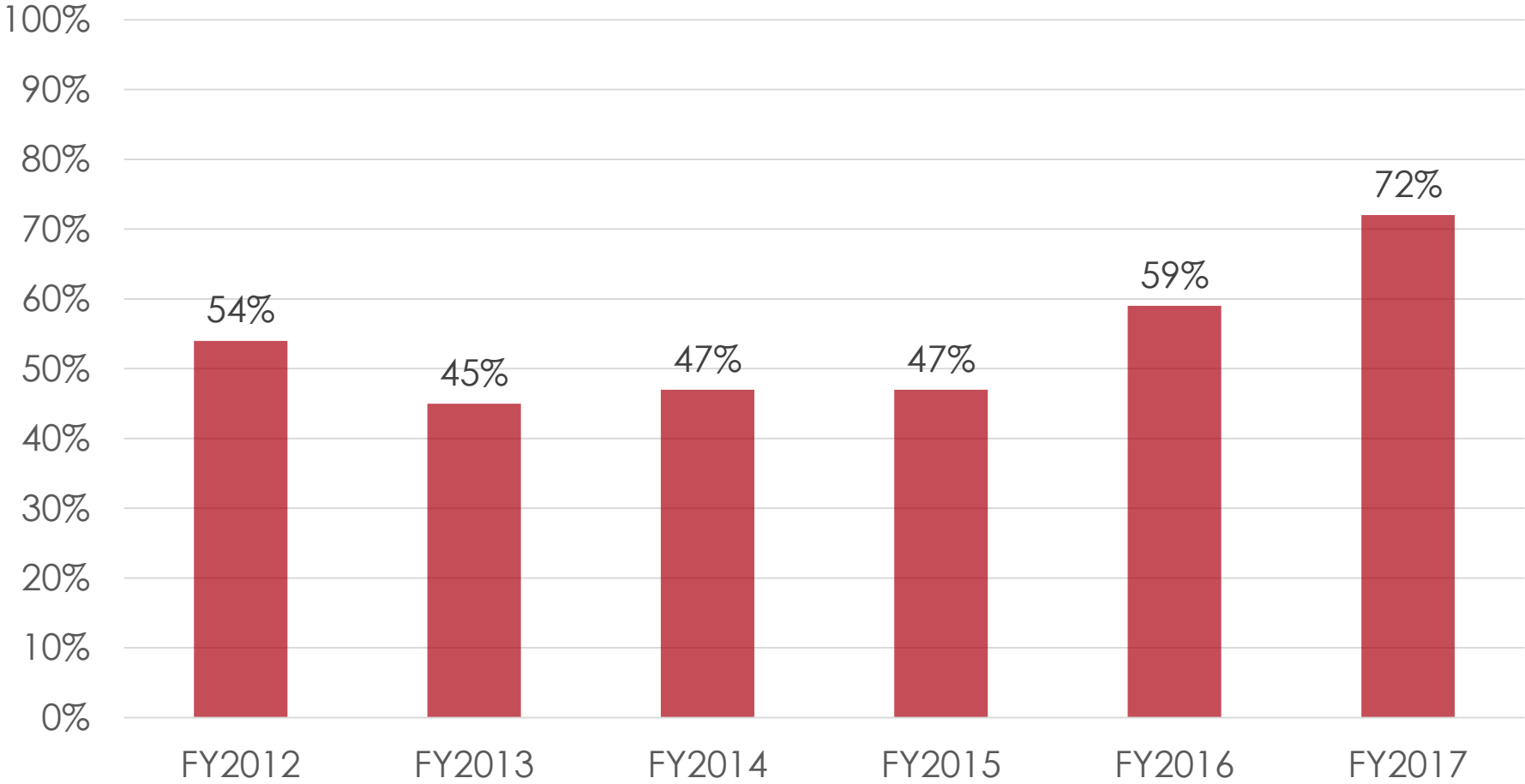
# Shopping Malls/ Stores (Top Responses)

FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
76% ABC 71% DFS 68% K-Mart	63% DFS 61% ABC 44% K-Mart	75% DFS 66% ABC 52% K-Mart	92% ABC 82% DFS 76% Guam Premium Outlet	88% ABC 78% DFS 70% Guam Premium Outlet	85% ABC 67% DFS 67% Guam Premium Outlet

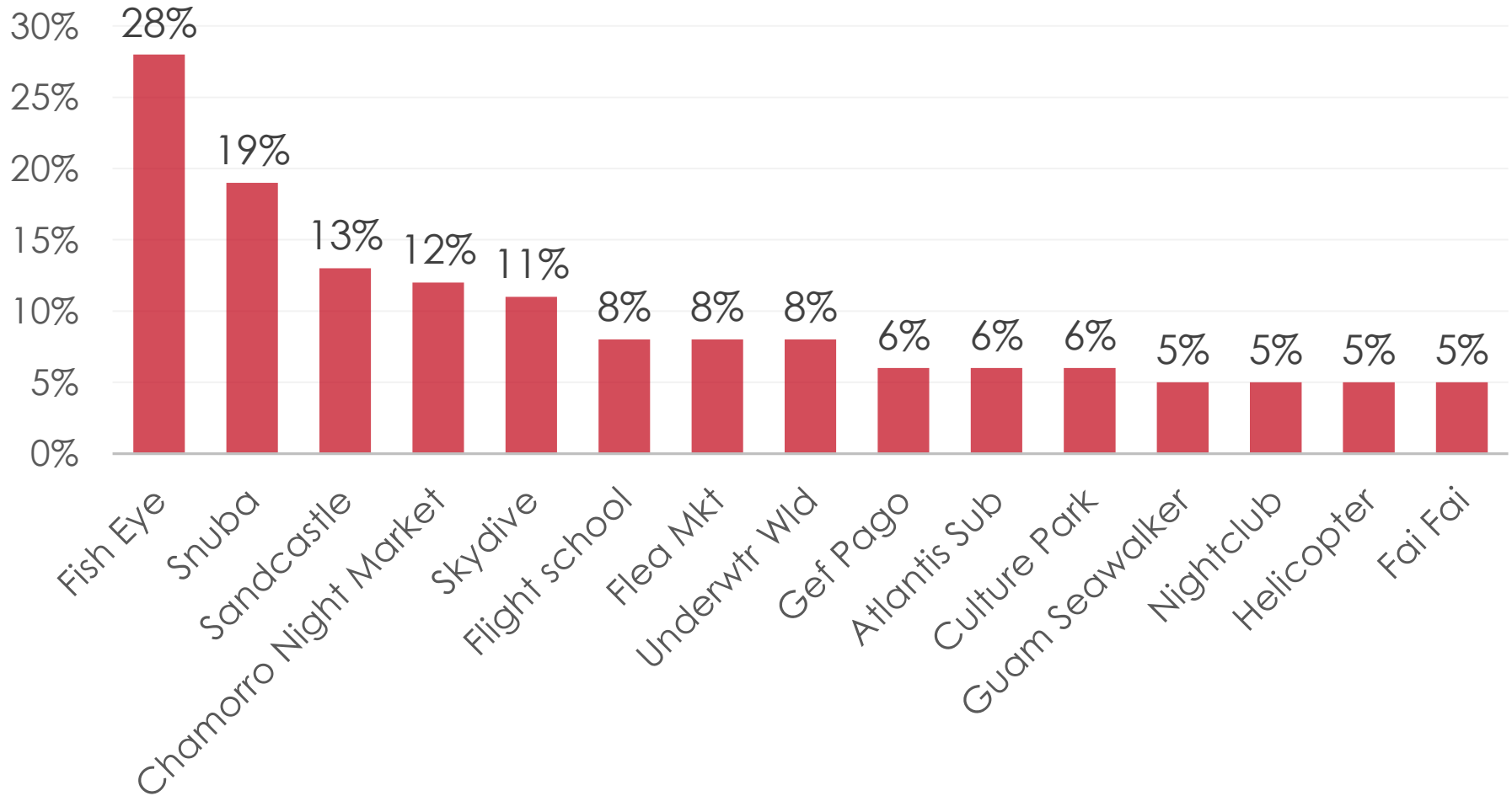
# SHOPPING - SATISFACTION



# OPTIONAL TOUR PARTICIPATION – Tracking

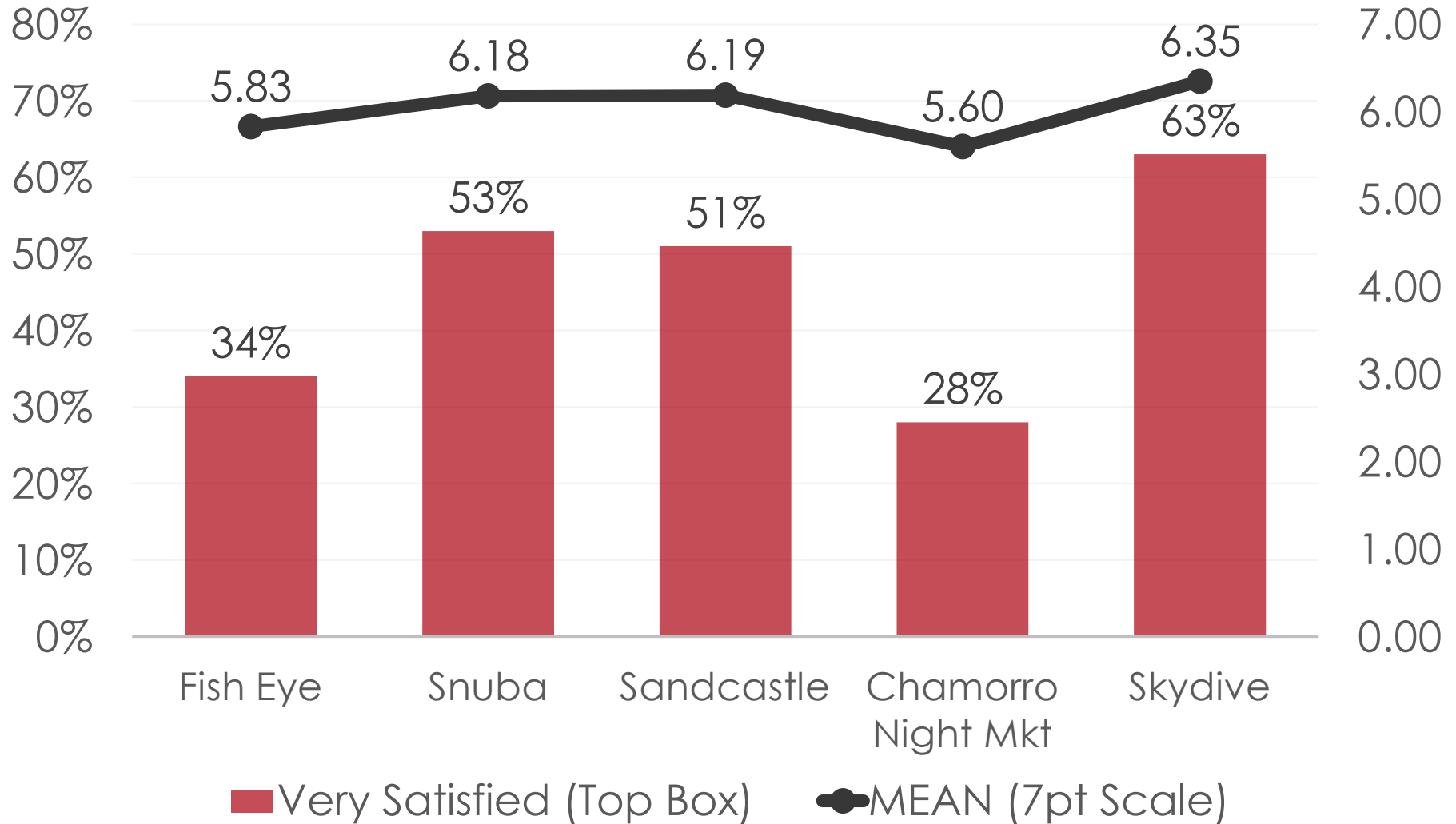


# Optional Tour Participation (Top Responses) FY2017

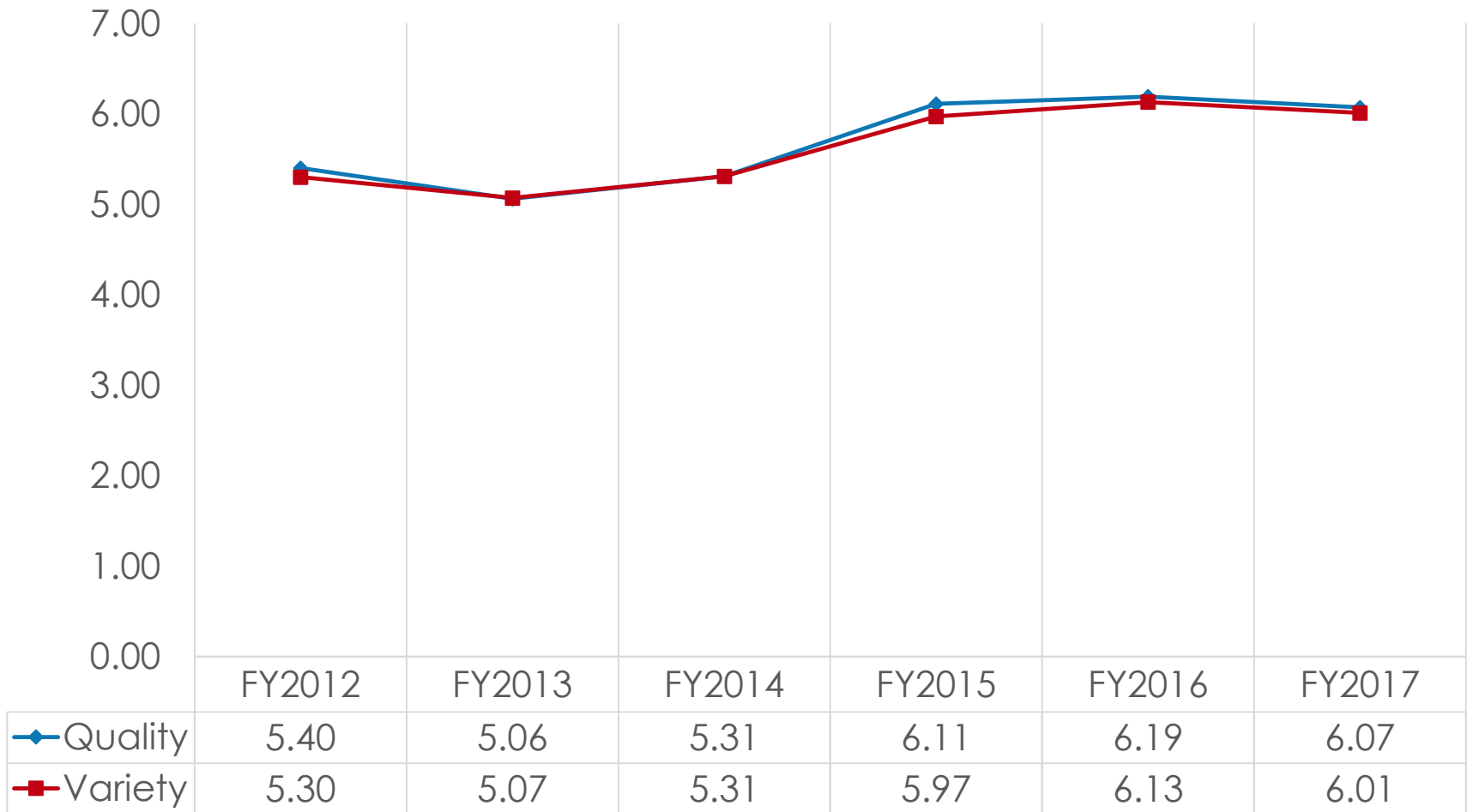


# Optional Tour Satisfaction

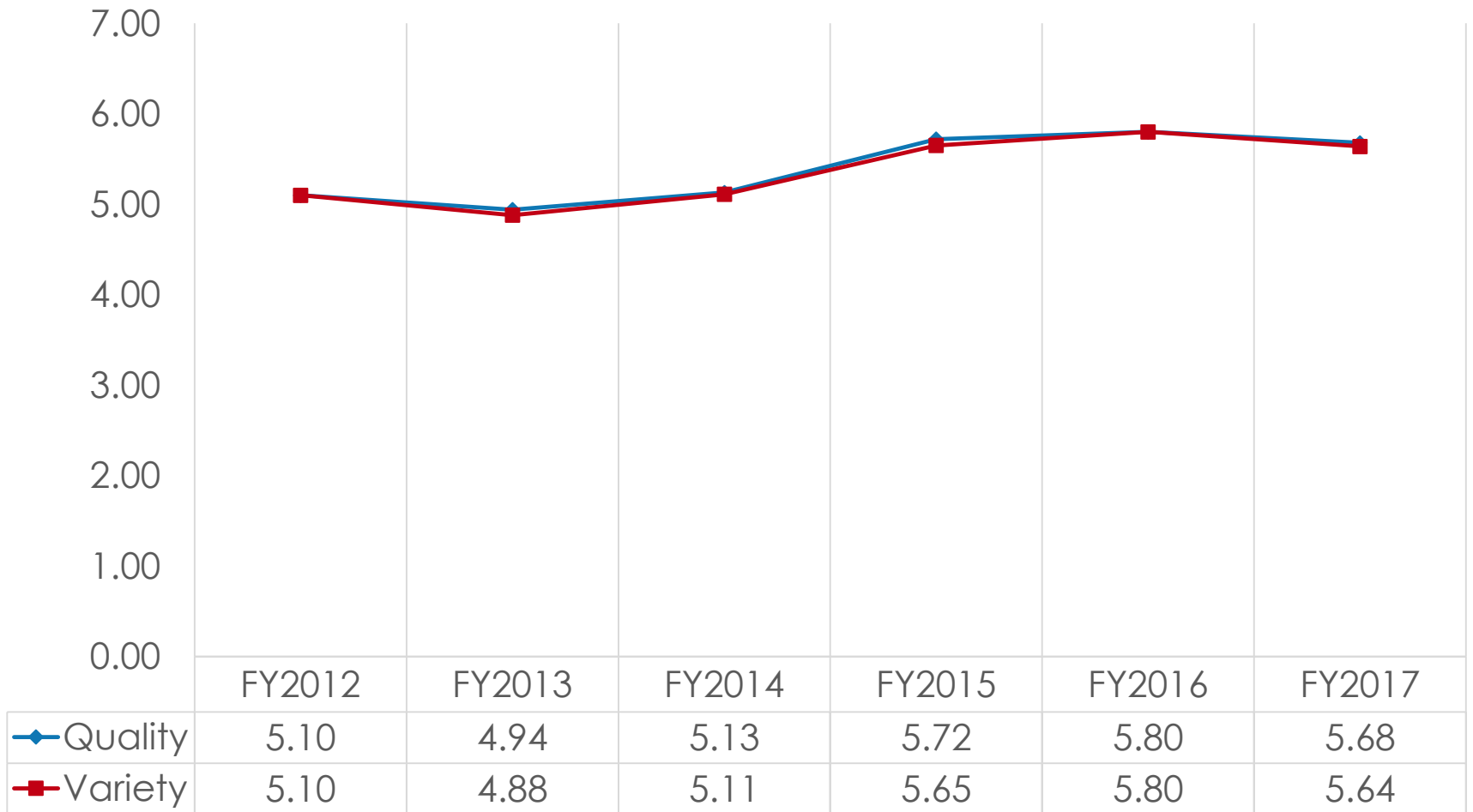
## Top Responses only - Participation (10%+)



# DAY TOUR - SATISFACTION

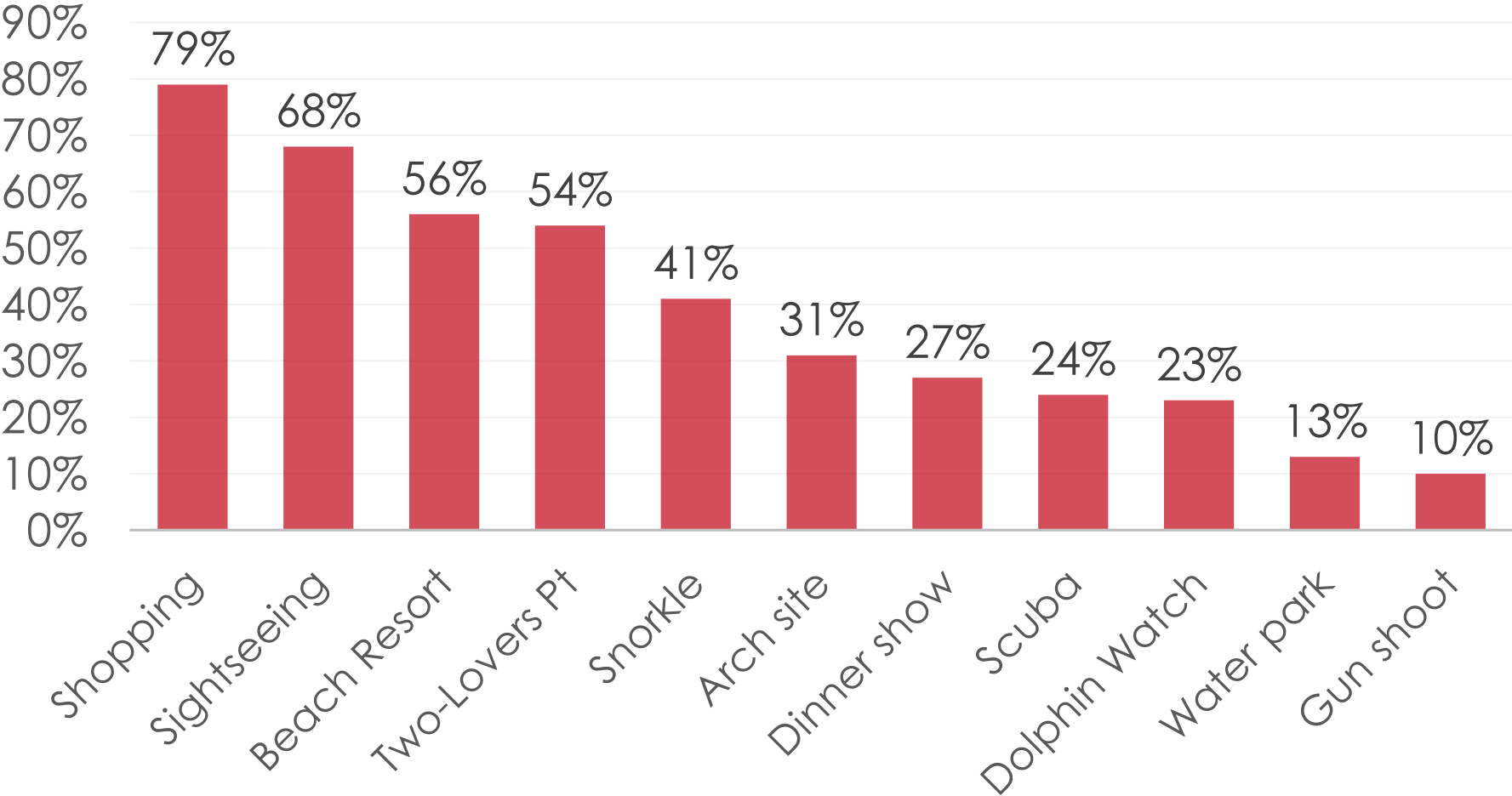


# NIGHT TOUR - SATISFACTION



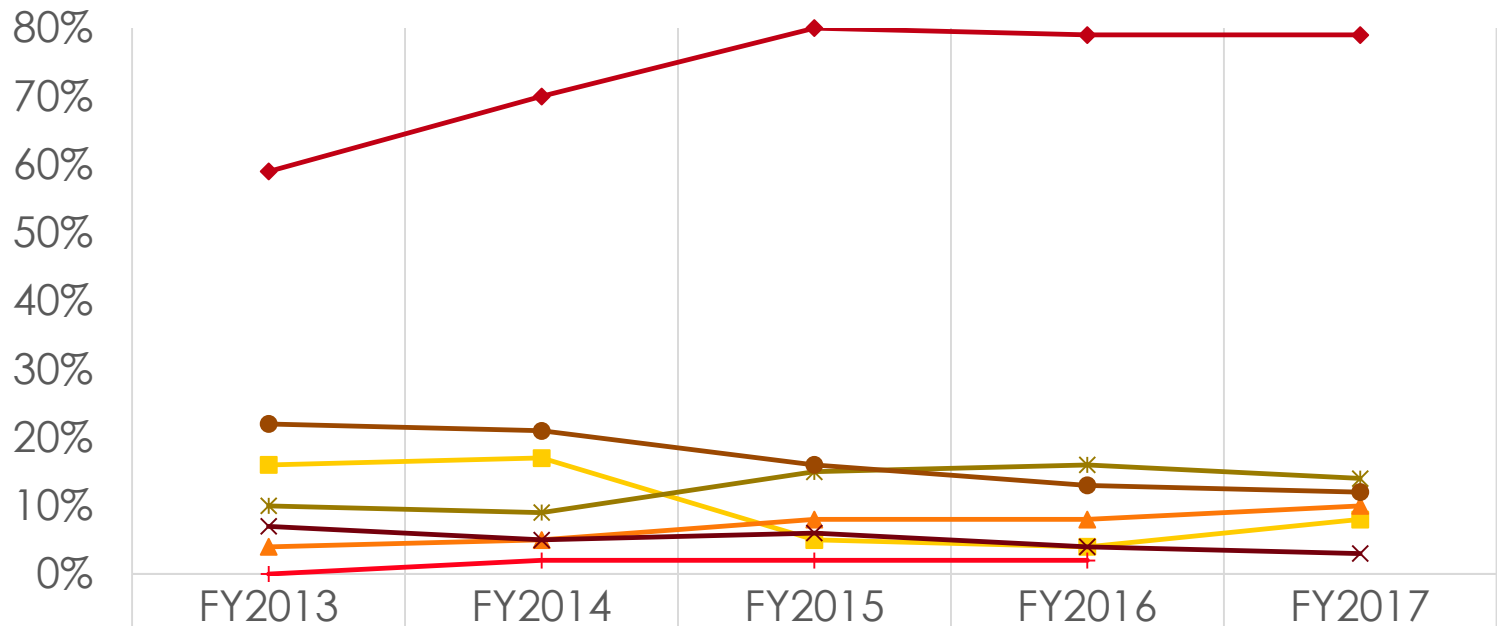


# Activities Participation (Top Responses)



# SECTION 5 PROMOTIONS

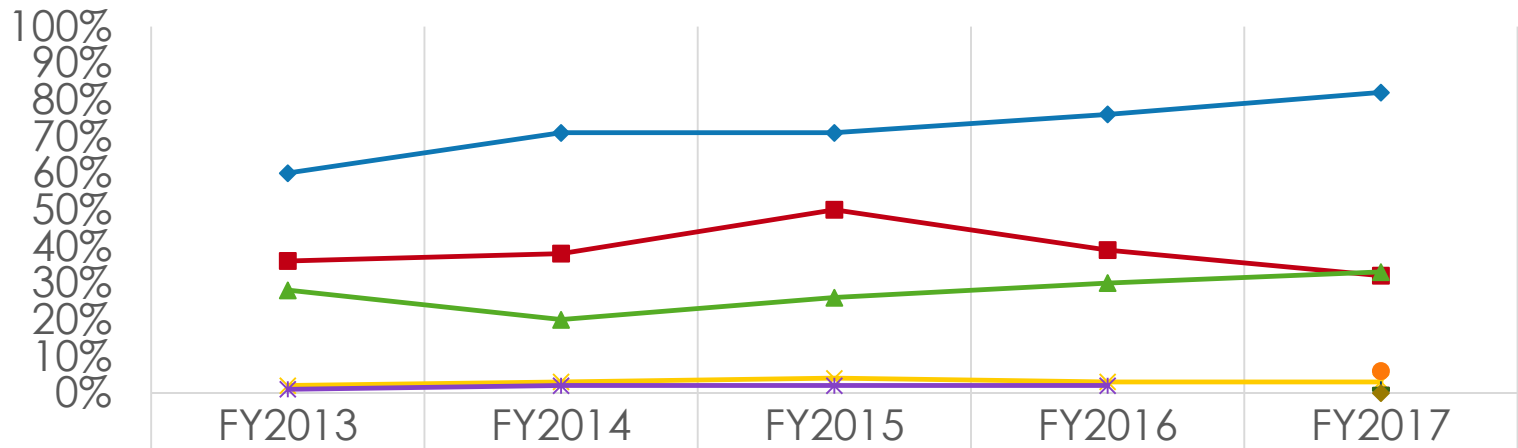
# INTERNET- GUAM SOURCES OF INFORMATION



◆ Search Engines	59%	70%	80%	79%	79%
■ Blogs	16%	17%	5%	4%	8%
▲ None	4%	5%	8%	8%	10%
× Q&A sites	7%	5%	6%	4%	3%
* Social network	10%	9%	15%	16%	14%
● Forums	22%	21%	16%	13%	12%
+ Other	0%	2%	2%	2%	

# INTERNET- SOURCES OF INFORMATION

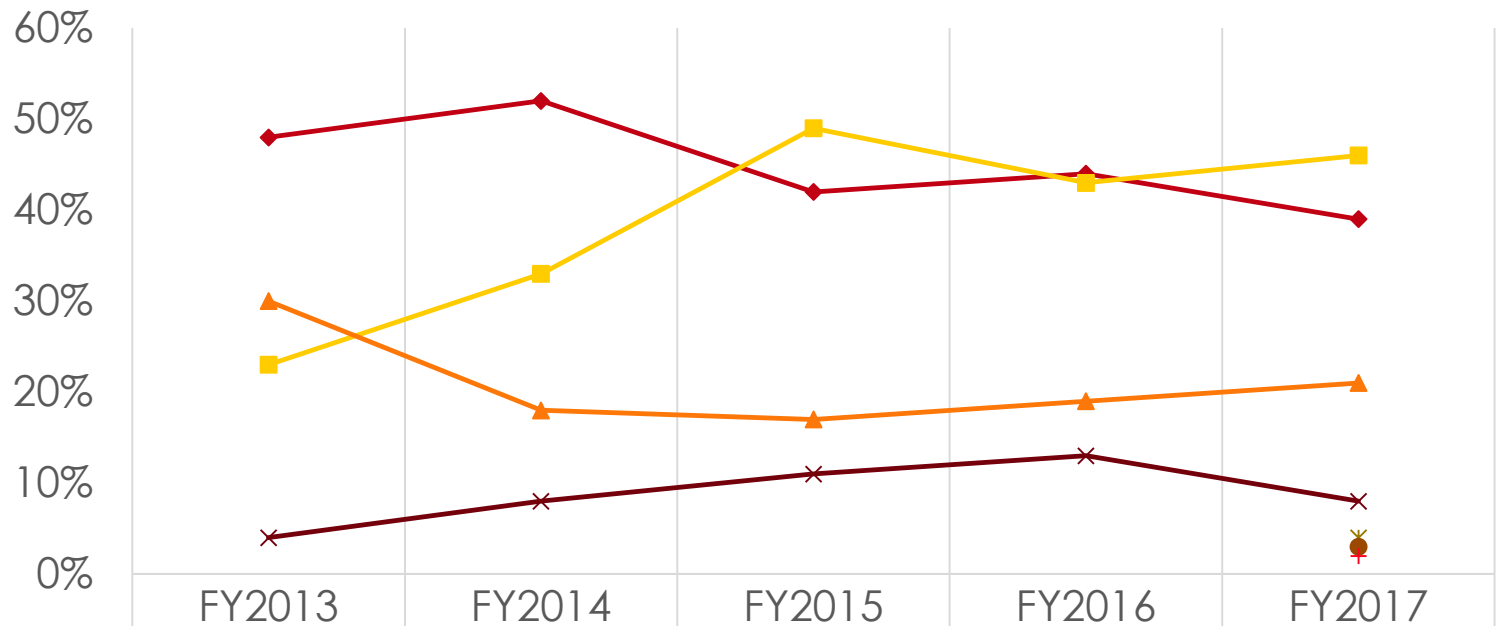
## Things to do on Guam



◆ Google	60%	71%	71%	76%	82%
■ Yahoo	36%	38%	50%	39%	32%
▲ Facebook	28%	20%	26%	30%	33%
✖ None	2%	3%	4%	3%	3%
✖ Other	1%	2%	2%	2%	
● Instagram					6%
◆ Online Booking					1%
— Baidu					1%
— Weibo					1%
◆ Twitter					0%

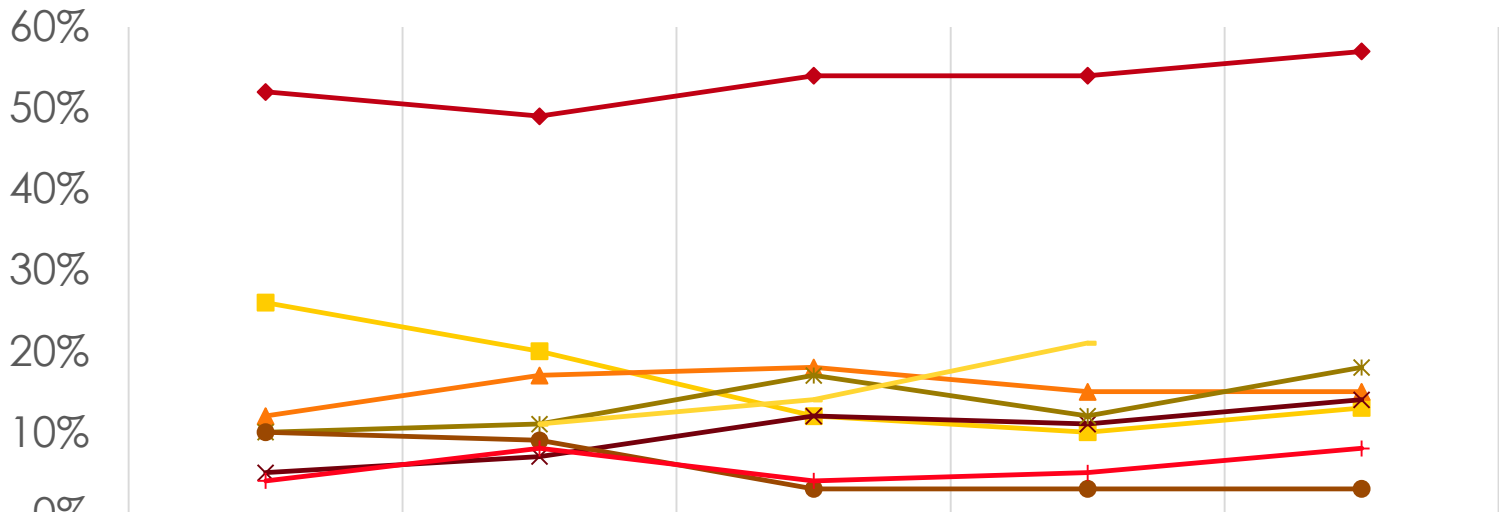
# INTERNET- SOURCES OF INFORMATION

## GVB



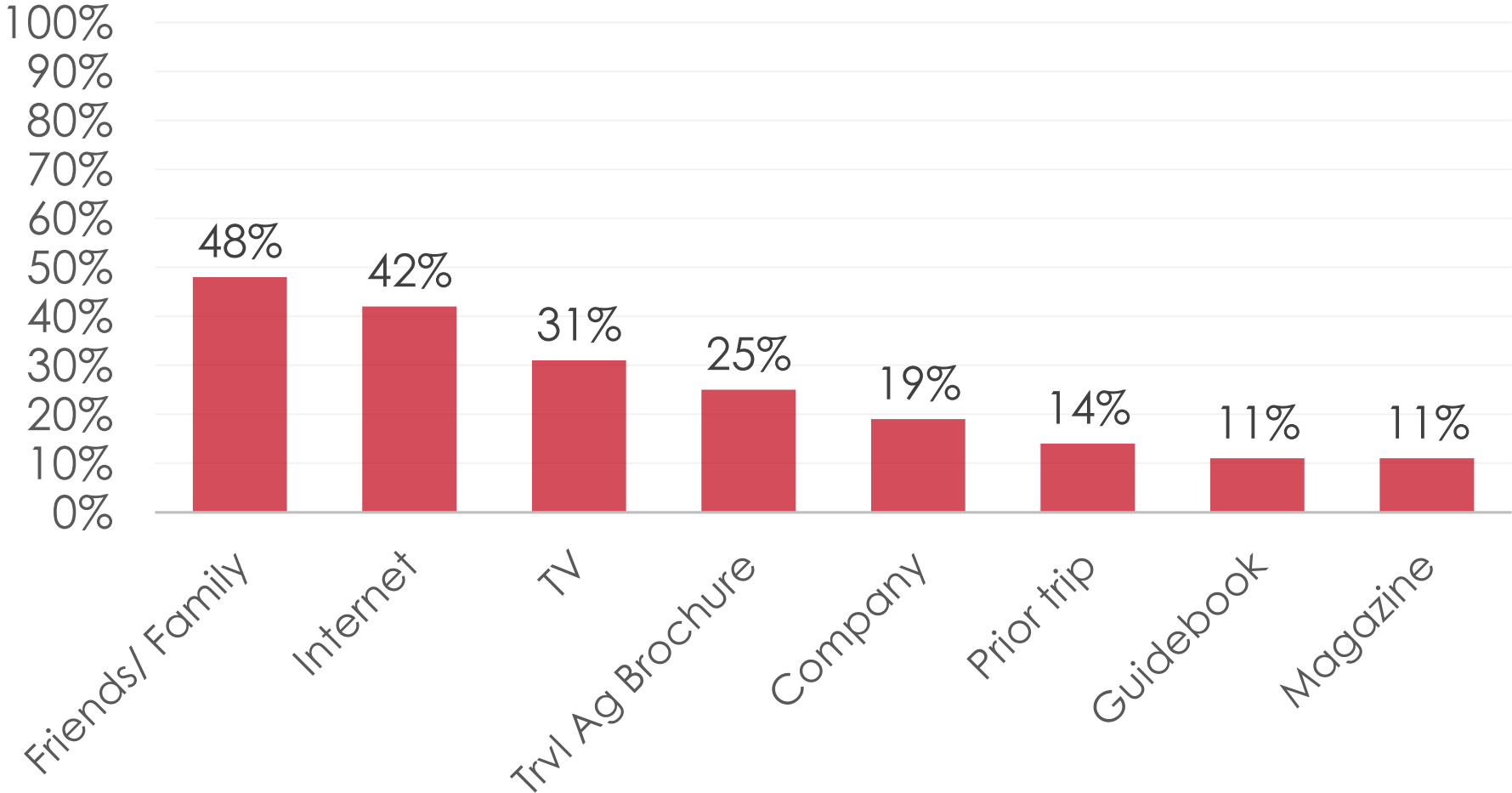
◆ None	48%	52%	42%	44%	39%
■ GVB Website	23%	33%	49%	43%	46%
▲ GVB Facebook	30%	18%	17%	19%	21%
✕ GVB Blog	4%	8%	11%	13%	8%
* GVB IG					4%
● GVB Twitter					3%
◆ GVB Café					2%

# TRAVEL MOTIVATION



	FY2013	FY2014	FY2015	FY2016	FY2017
Friends/ Family	52%	49%	54%	54%	57%
Internet	26%	20%	12%	10%	13%
Travel Agent	12%	17%	18%	15%	15%
Social media	5%	7%	12%	11%	14%
Travel shows	10%	11%	17%	12%	18%
Magazine	10%	9%	3%	3%	3%
Company/ Bus	4%	8%	4%	5%	8%
Other		11%	14%	21%	

# PRE-ARRIVAL SOURCES OF INFORMATION



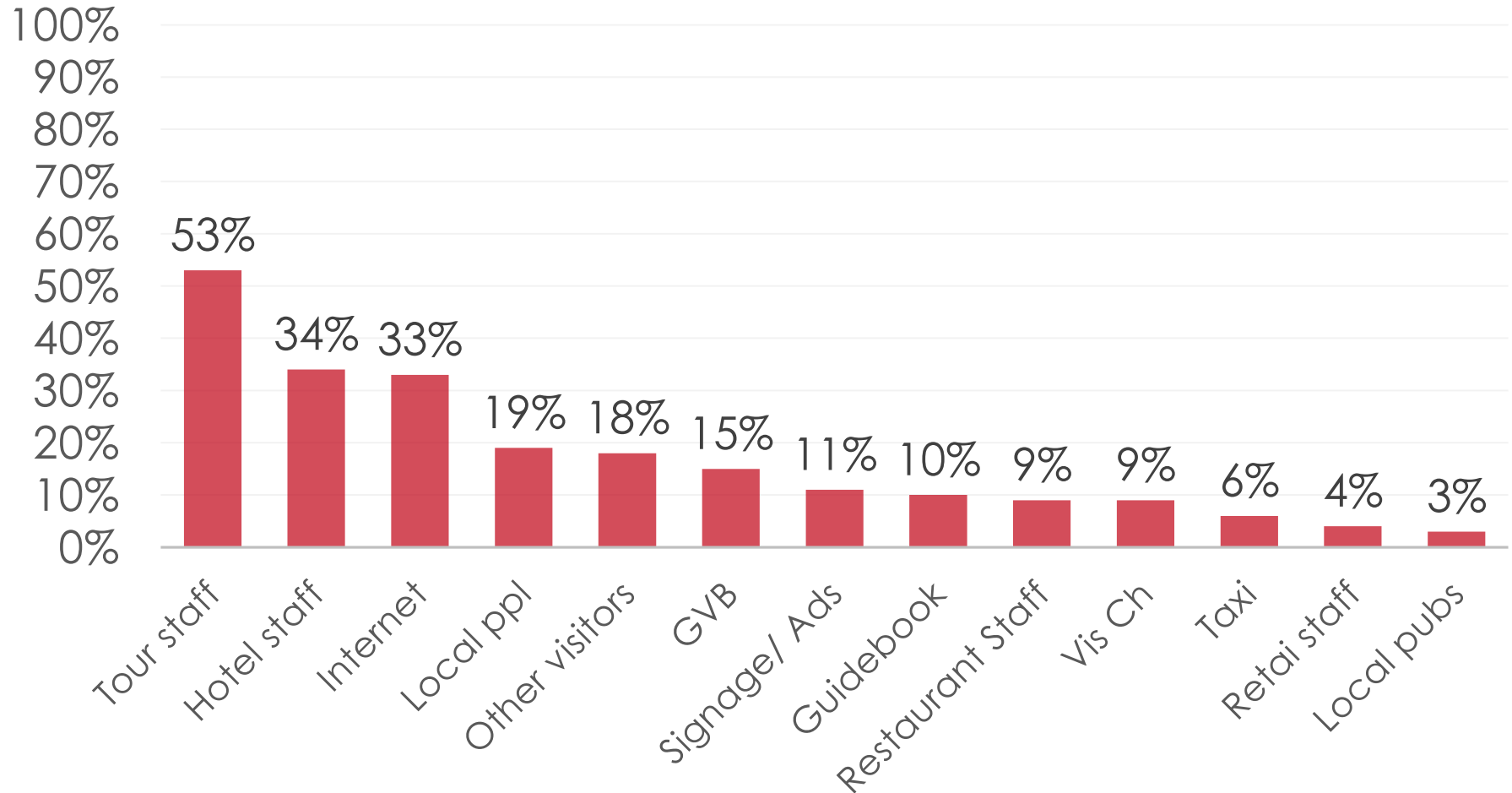
# PRE-ARRIVAL SOURCES OF INFORMATION

FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
52% Internet 11% Brochure 8% TV	46% Internet 17% Recomme nd 10% TV	44% Internet 17% Recomme nd 8% TV	43% Internet 15% Recomme nd 11% Brochure	38% Internet 18% Recomme nd 9% Brochure	48% Recomme nd 42% Internet 31% TV



# ONISLE

## SOURCES OF INFORMATION



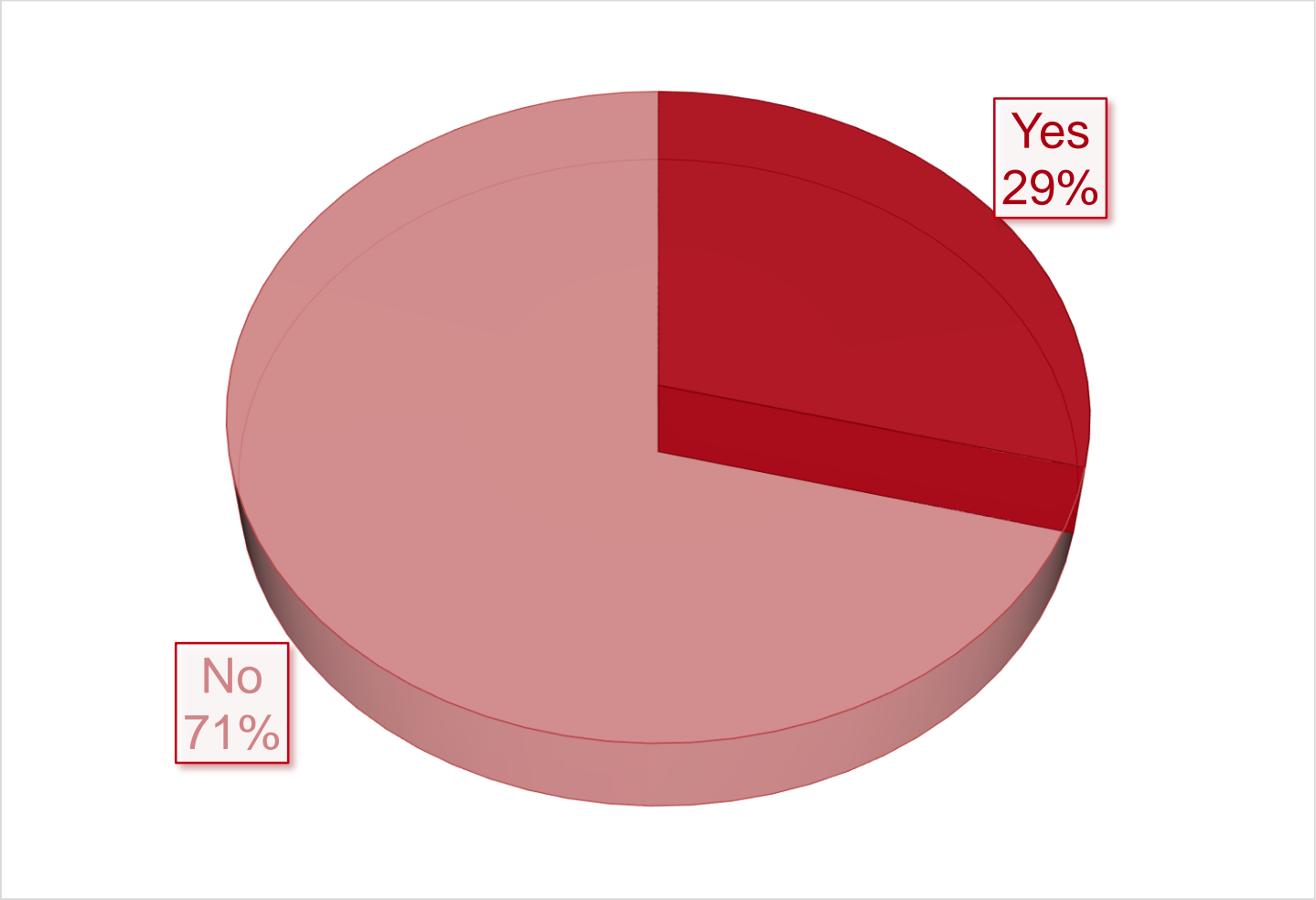
# ON-ISLE SOURCES OF INFORMATION

FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
18% Tour staff 12% Hotel staff	25% Hotel staff 20% Tour staff 11% Internet	32% Tour staff 21% Internet 13% Hotel staff	51% Tour staff 18% Internet 6% Hotel staff	36% Tour staff 26% Internet 11% Hotel staff	53% Tour staff 34% Hotel staff 33% Internet/ app

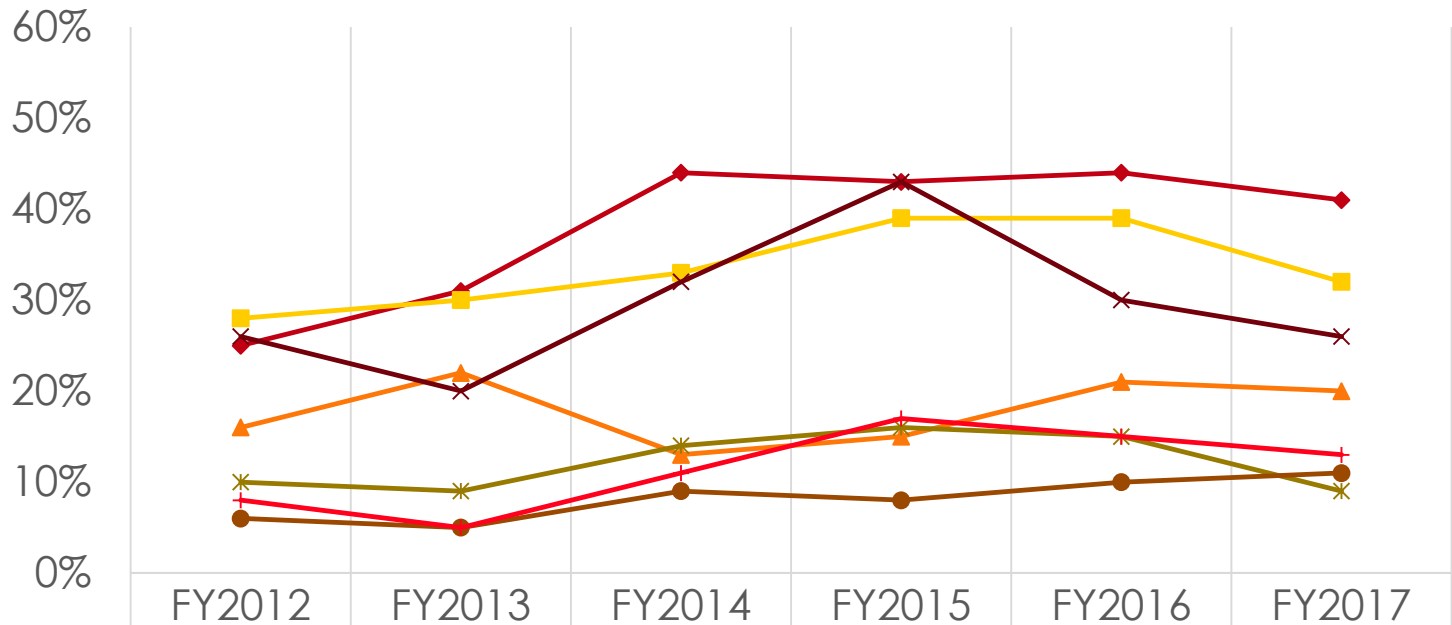
# SECTION 6

# FUTURE TRAVEL TO GUAM

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

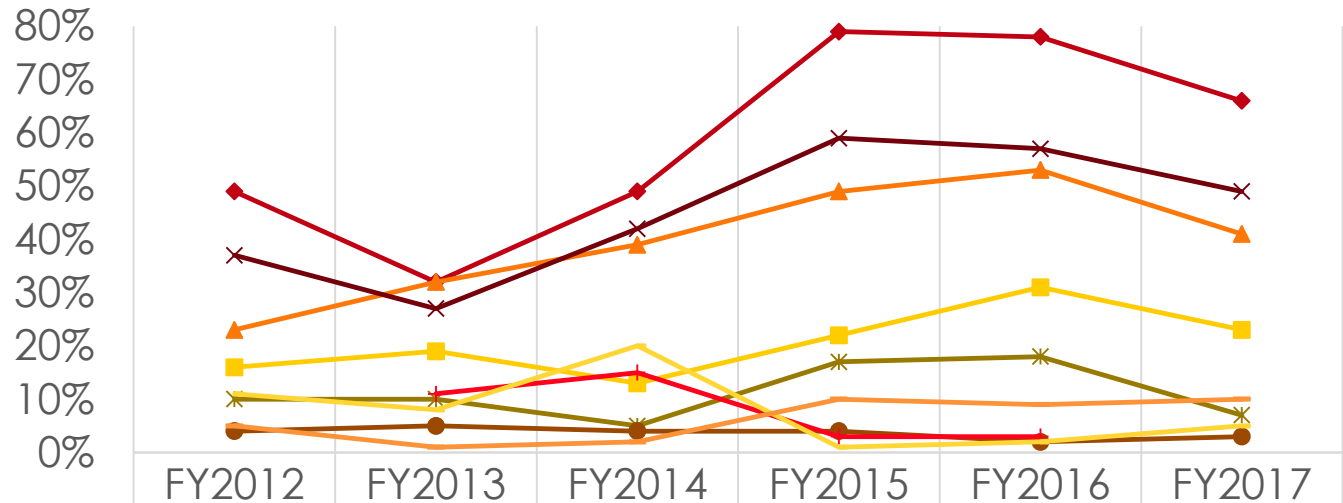


# What would it take to make you stay an extra day on Guam?



◆ More time	25%	31%	44%	43%	44%	41%
■ Budget/ money	28%	30%	33%	39%	39%	32%
▲ Nothing	16%	22%	13%	15%	21%	20%
✕ Flt Schedules	26%	20%	32%	43%	30%	26%
* Less restrictions	10%	9%	14%	16%	15%	9%
● Things to do	6%	5%	9%	8%	10%	11%
— Pkg - longer stays	8%	5%	11%	17%	15%	13%

# FUTURE TRAVEL CONCERNS

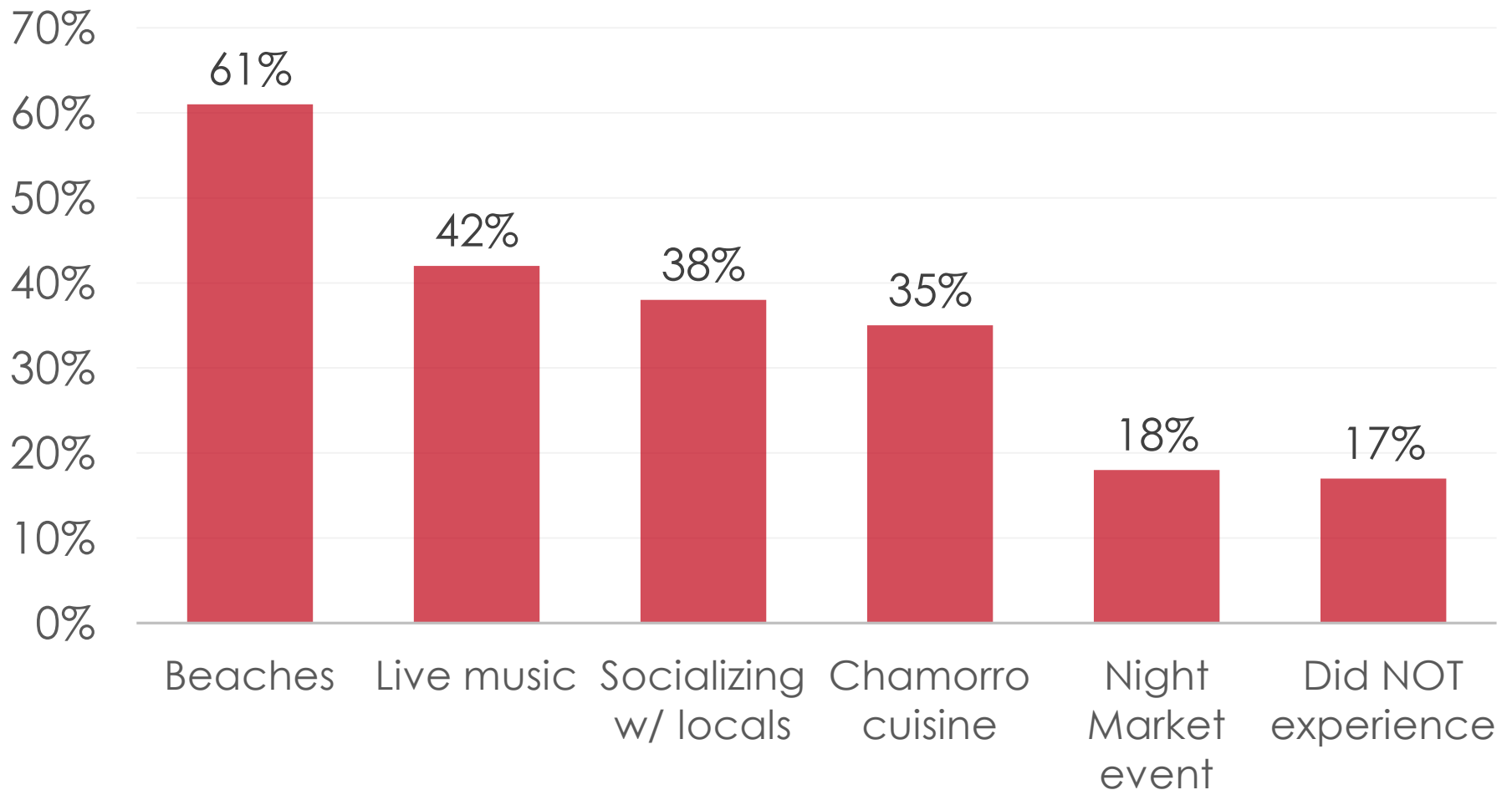


◆ Safety	49%	32%	49%	79%	78%	66%
■ Terrorism	16%	19%	13%	22%	31%	23%
▲ Food	23%	32%	39%	49%	53%	41%
✕ Expense	37%	27%	42%	59%	57%	49%
✱ Discrimination	10%	10%	5%	17%	18%	7%
● Should spend at home	4%	5%	4%	4%	2%	3%
◆ Other		11%	15%	3%	3%	
— Don't know	11%	8%	20%	1%	2%	5%
— No concerns	5%	1%	2%	10%	9%	10%

# SECTION 7

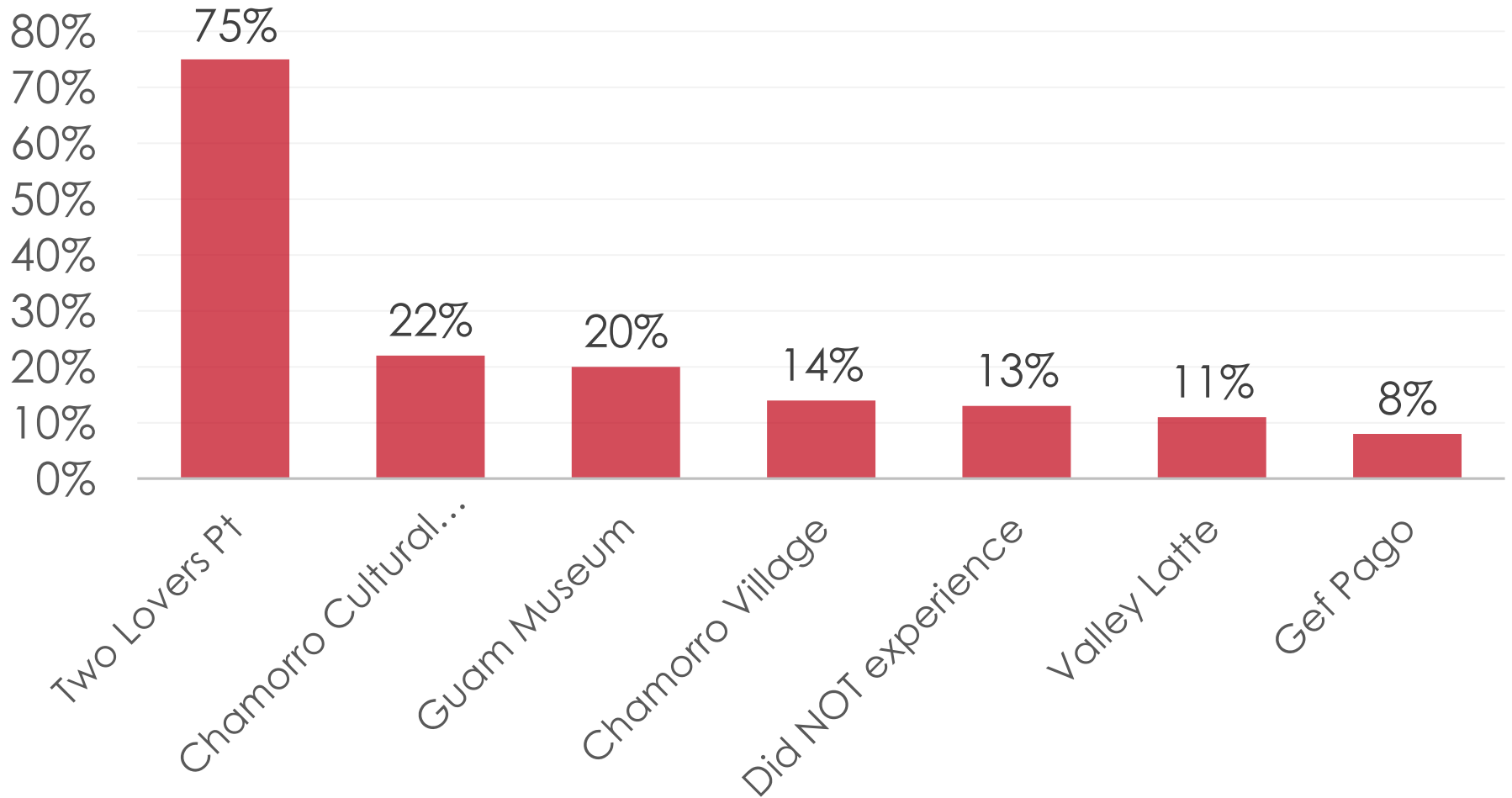
# GUAM CULTURE

# EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT

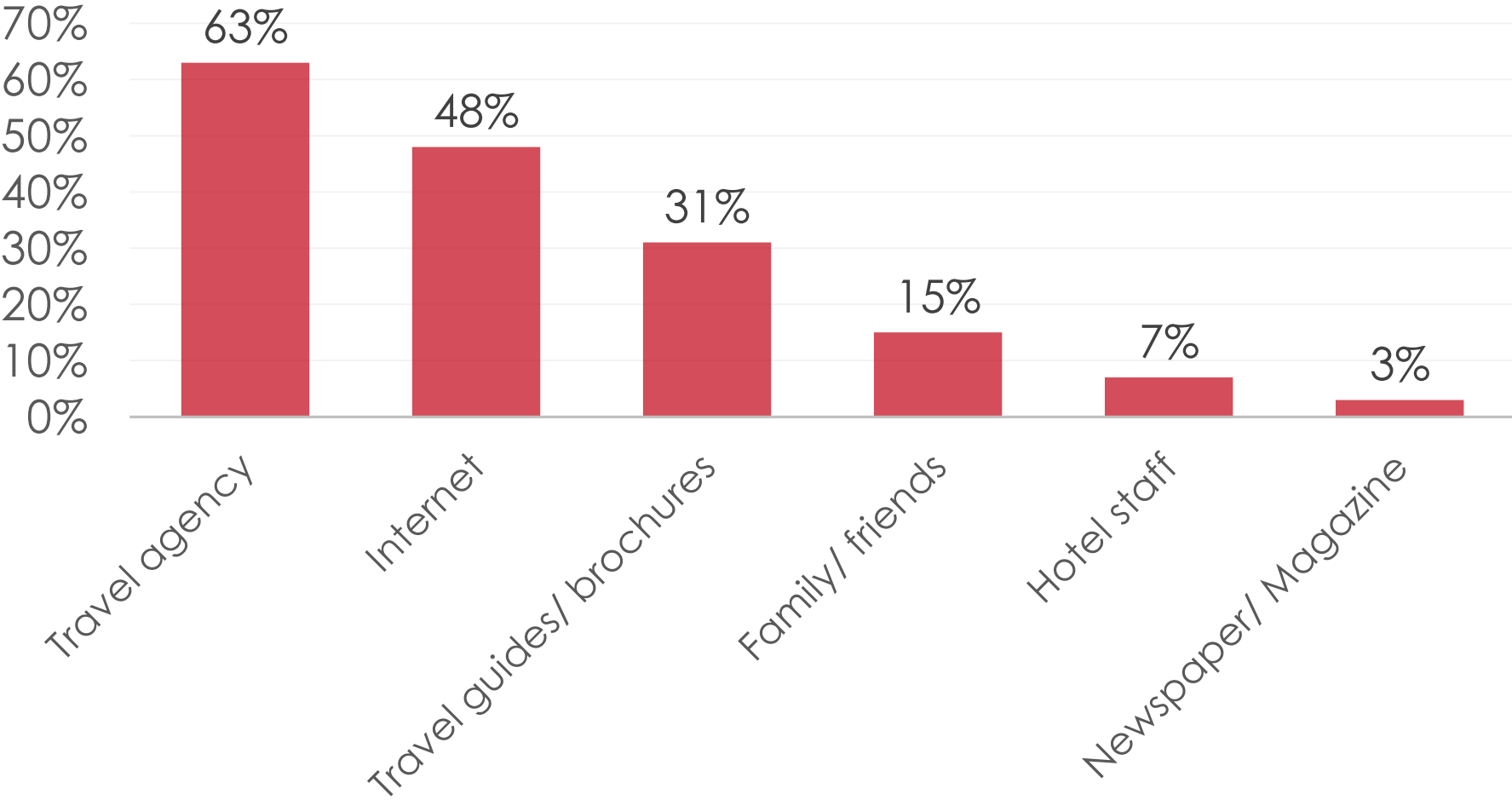




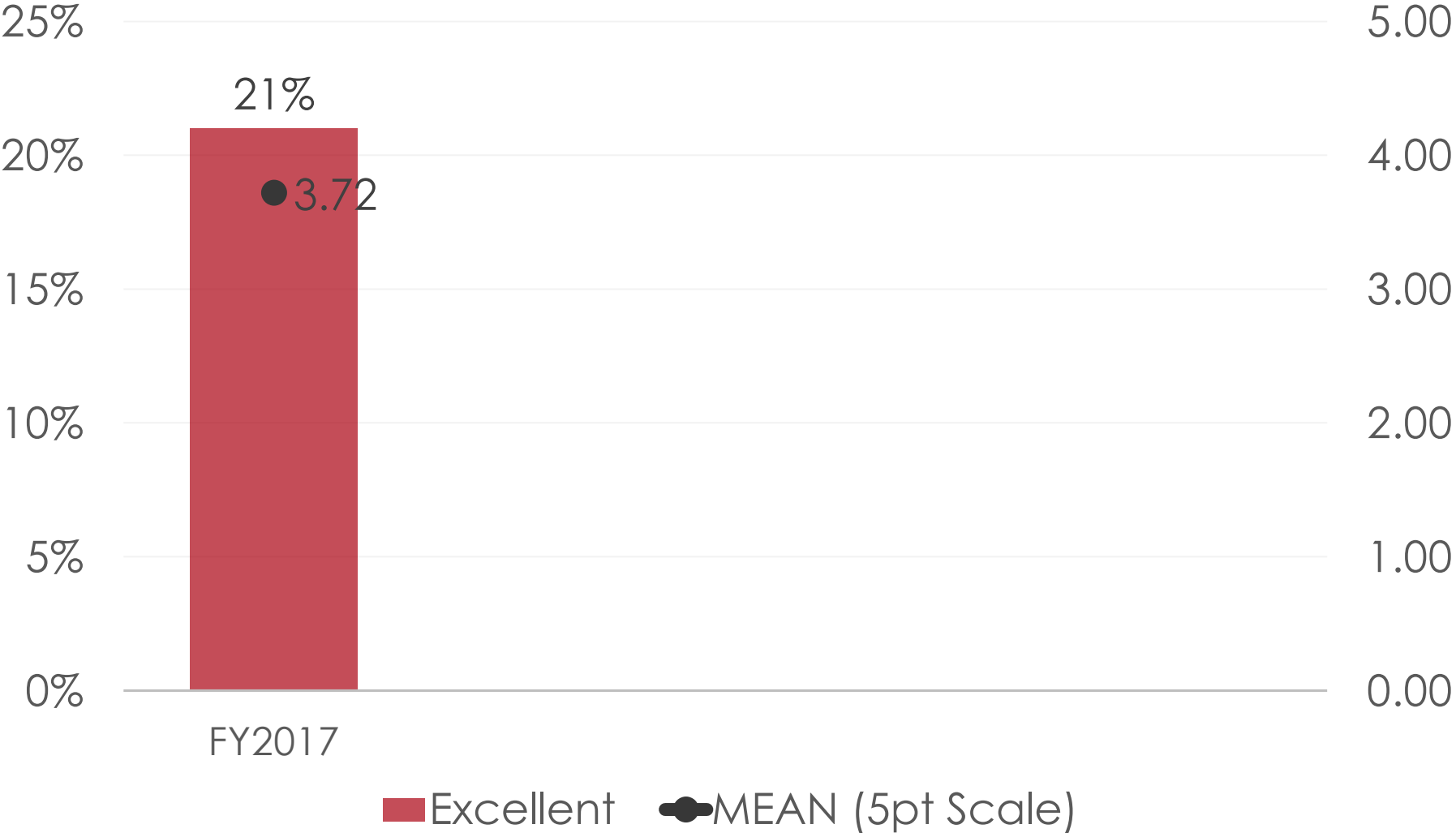
# EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



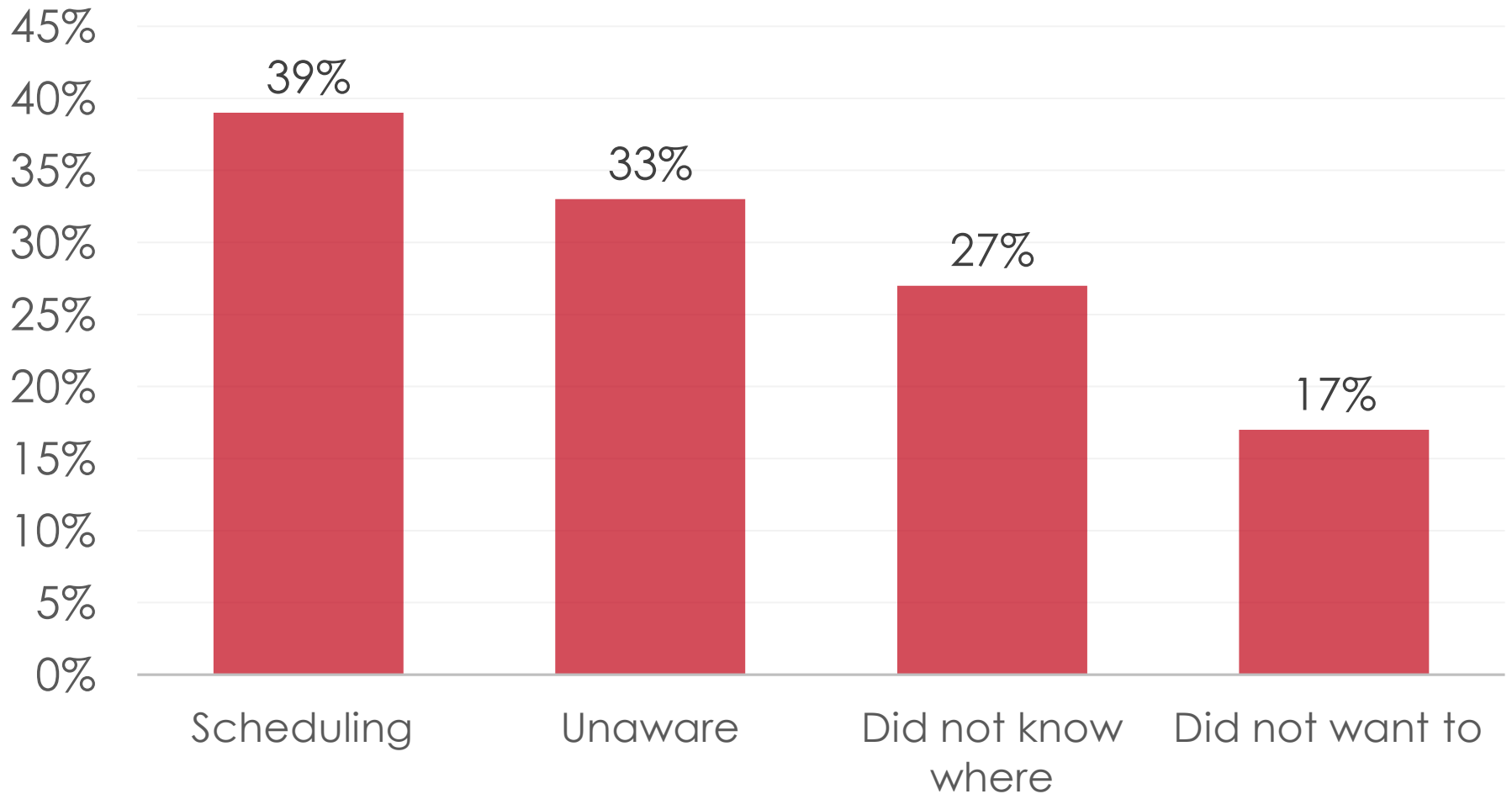
# SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



# SATISFACTION- CULTURAL ACTIVITY/EVENTS



# OBSTACLES- CULTURAL ACTIVITY/EVENTS



# SECTION 8

# ADVANCED STATS

# 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.

# Drivers - Overall Satisfaction

<b>Comparison of Drivers of Overall Satisfaction, Annual 2017</b>	
	<b>Annual 2017 rank</b>
Drivers:	
Quality & Cleanliness of beaches & parks	<b>5</b>
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	<b>1</b>
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	<b>7</b>
Variety of shopping	
Price of things on Guam	<b>4</b>
Quality of hotel accommodations	<b>6</b>
Quality/cleanliness of air, sky	<b>3</b>
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	
Quality of ground handler	<b>2</b>
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	<b>58.5%</b>
NOTE: Only significant drivers are included.	

# Drivers of Overall Satisfaction

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by seven significant factors in the 2017 Period. By rank order they are:
  - **Quality of day time tours,**
  - **Quality of ground handler,**
  - **Quality/cleanliness of air, sky,**
  - **Price of things on Guam,**
  - **Quality & cleanliness of beaches & parks,**
  - **Quality of hotel accommodations, and**
  - **Quality of shopping.**
- With all seven factors the overall  $r^2$  is .585 meaning that **58.5% of overall satisfaction is accounted for by these factors.**



# Drivers – On-Isle Expenditures

Comparison of Drivers of Per Person On-Island Expenditures, Annual 2017	
Drivers:	Annual 2017 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	
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	<b>0.0%</b>
NOTE: Only significant drivers are included.	

# Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Taiwan visitors on Guam is driven by no significant factor in the 2017 period.