

Guam Visitors Bureau

Taiwan Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

QTR.4 (JULY - SEPT 2017)

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 **183** 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 **183** is +/- 7.24 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 +/- 7.24 percentage points.

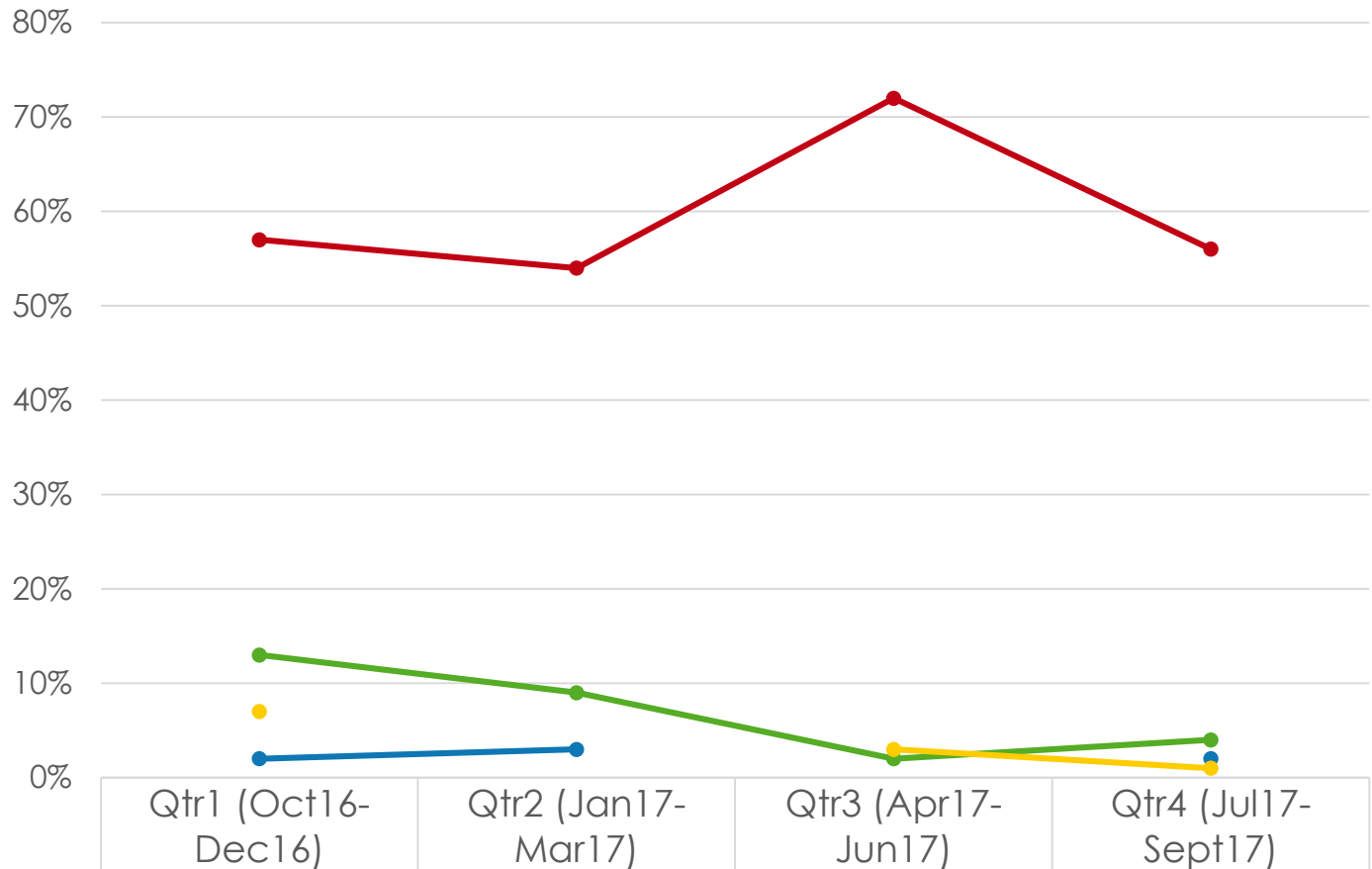
Objectives

- 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

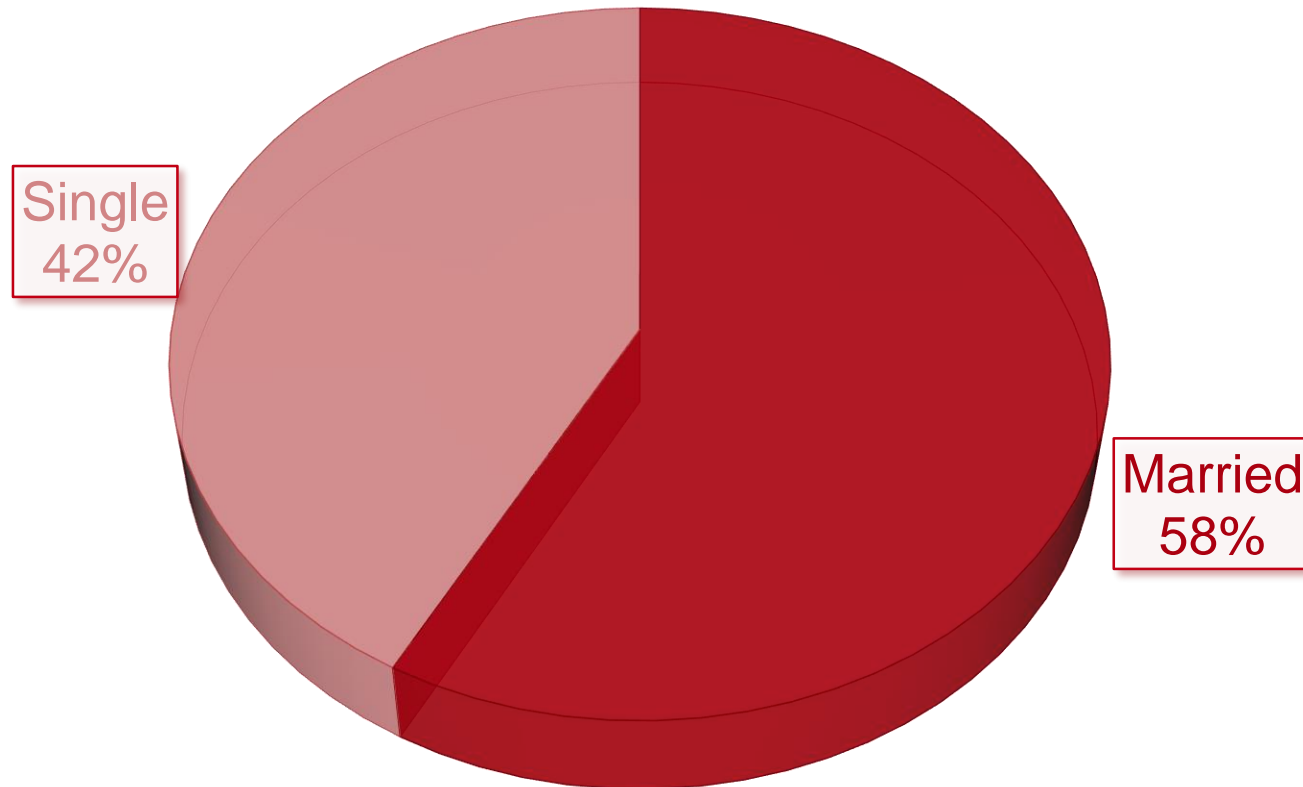


— MICE	2%	3%		2%
— Sports/ Adventure	57%	54%	72%	56%
— Honeymoon	13%	9%	2%	4%
— Wedding	7%		3%	1%

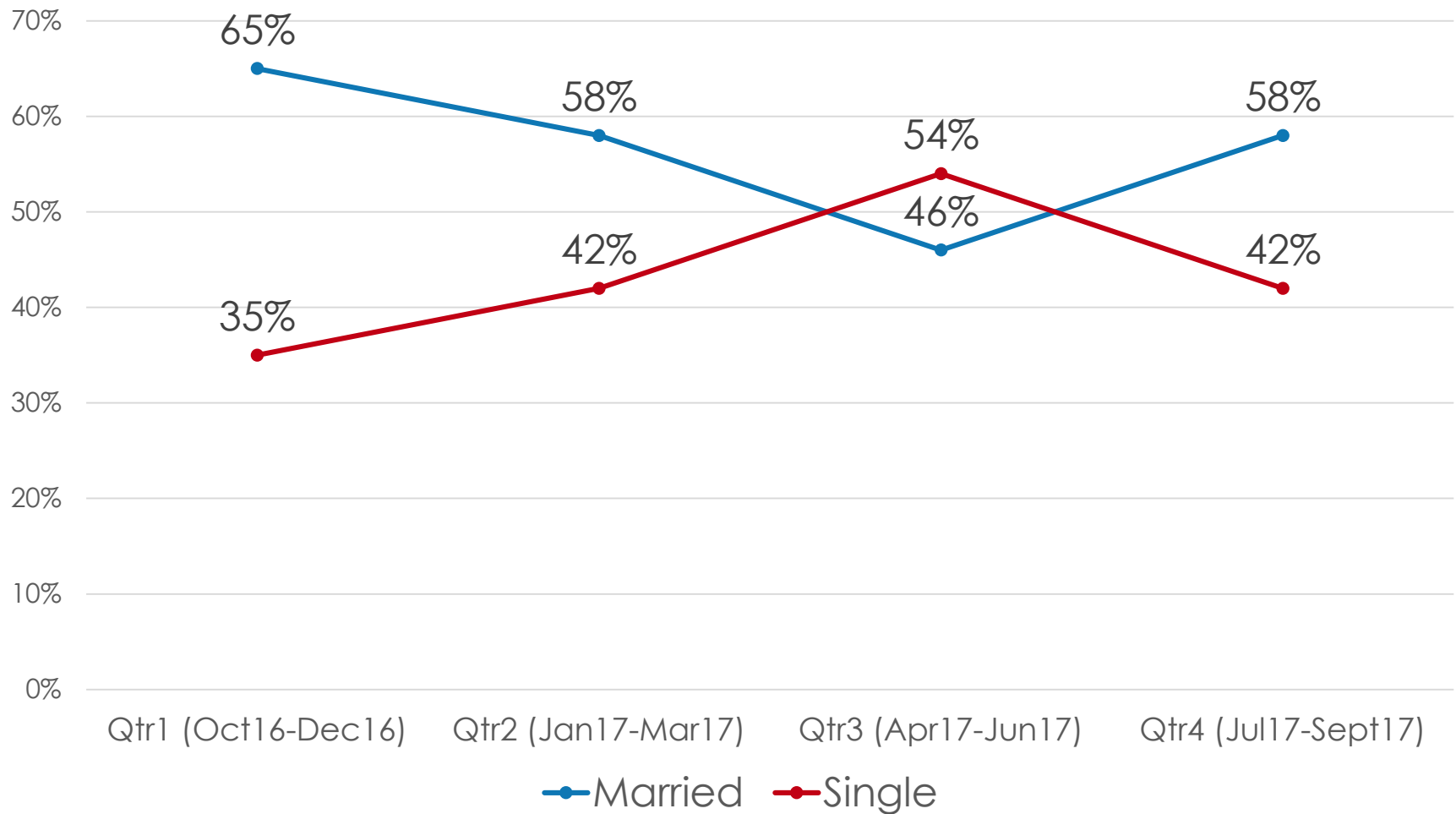
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2017 Tracking



Marital status – Key Segments

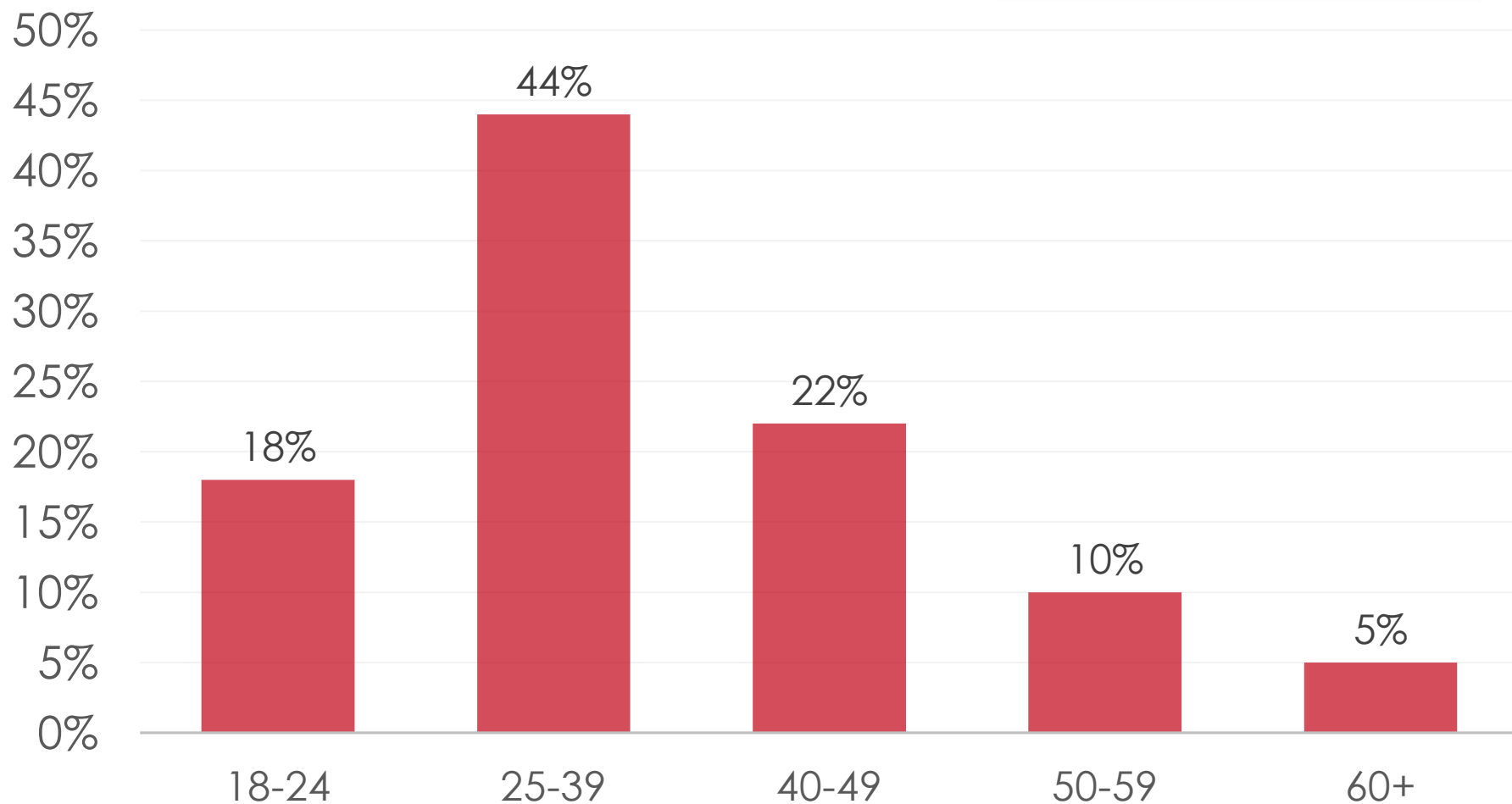
**GVB EXIT SURVEY
QE MARITAL STATUS**

		TOTAL	MICE	SPORT/ ADV	WEDDING	HONEYMOON
		-	-	-	-	-
QE	Married	58%		55%	100%	86%
	Single	42%	100%	45%		14%
	Total	183	3	102	2	7

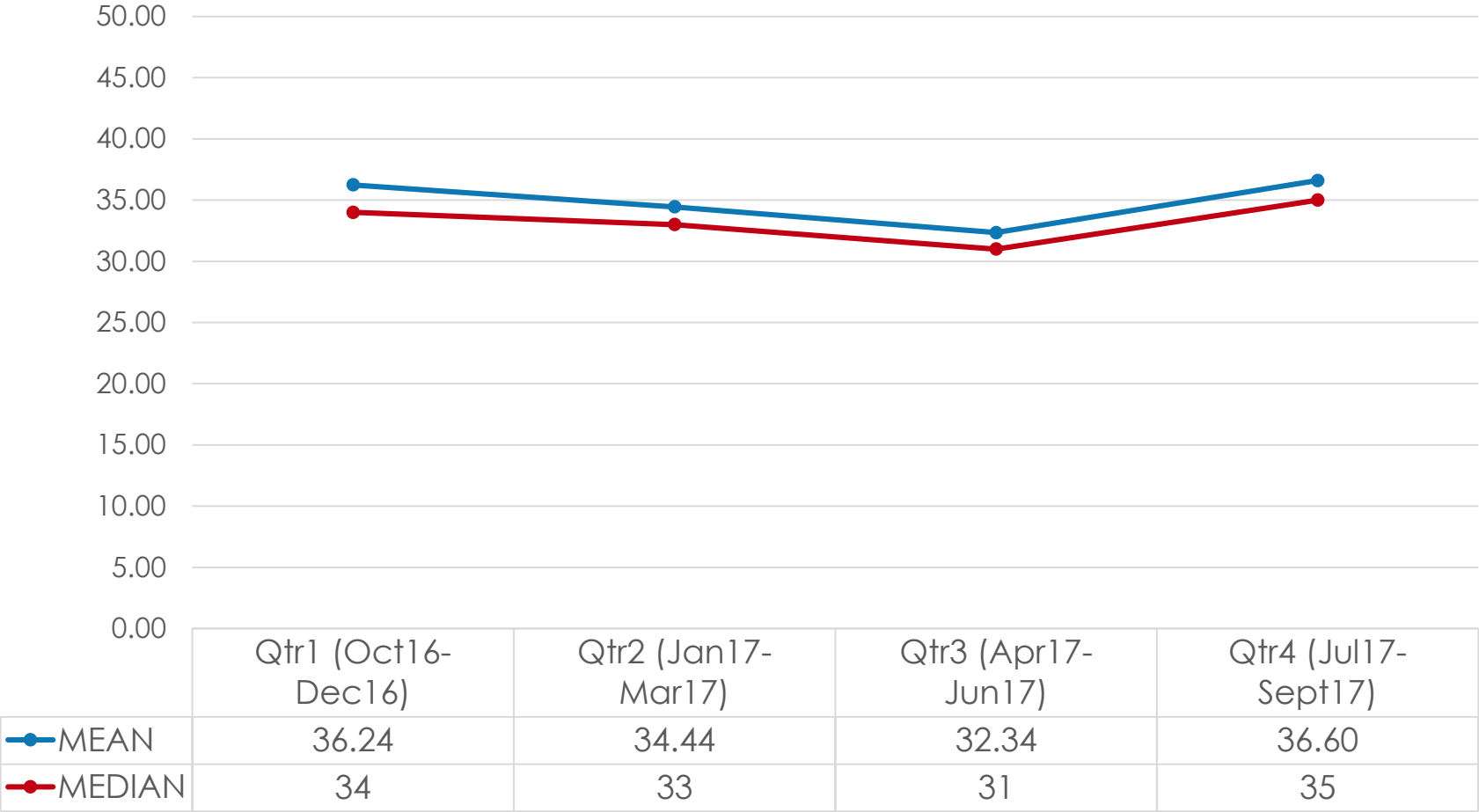
Prepared by Anthology Research

Age

MEAN = 36.60
MEDIAN = 35



Age – FY2017 Tracking



Age – Key Segments

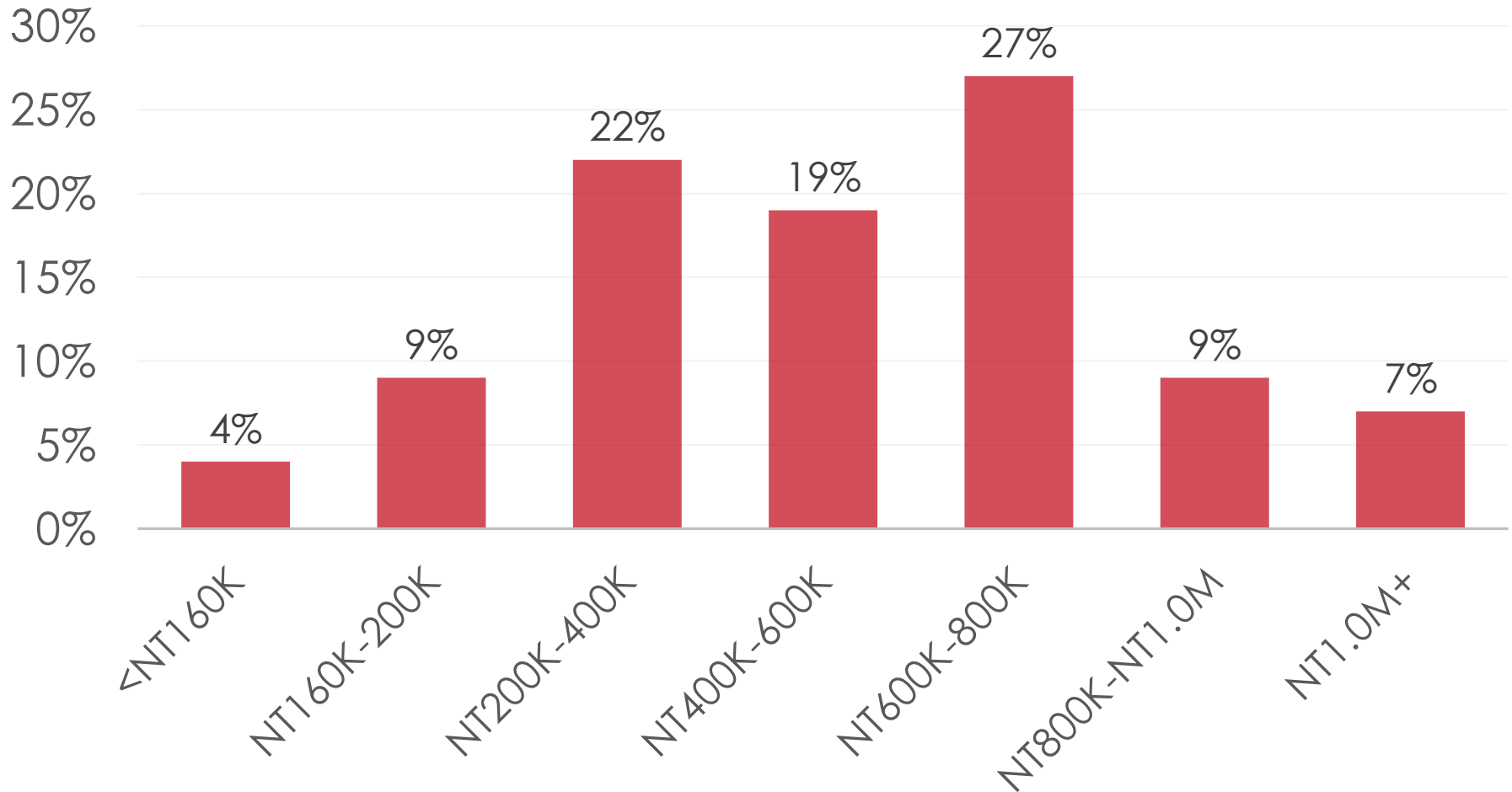
**GVB EXIT SURVEY
AGE**

		TOTAL	MICE	SPORT/ ADV	WEDDING	HONEYMOON
		-	-	-	-	-
SD	18-24	18%	33%	21%		14%
	25-39	44%	33%	47%	100%	86%
	40-49	22%		21%		
	50-59	10%		10%		
	60+	5%	33%	2%		
	Total	183	3	102	2	7
SD	Mean	36.60	39.33	34.43	33.50	29.86
	Median	35	35	33	34	30

Prepared by Anthology Research

Annual Household Income

EXCHANGE RATE TWD30.26=\$1



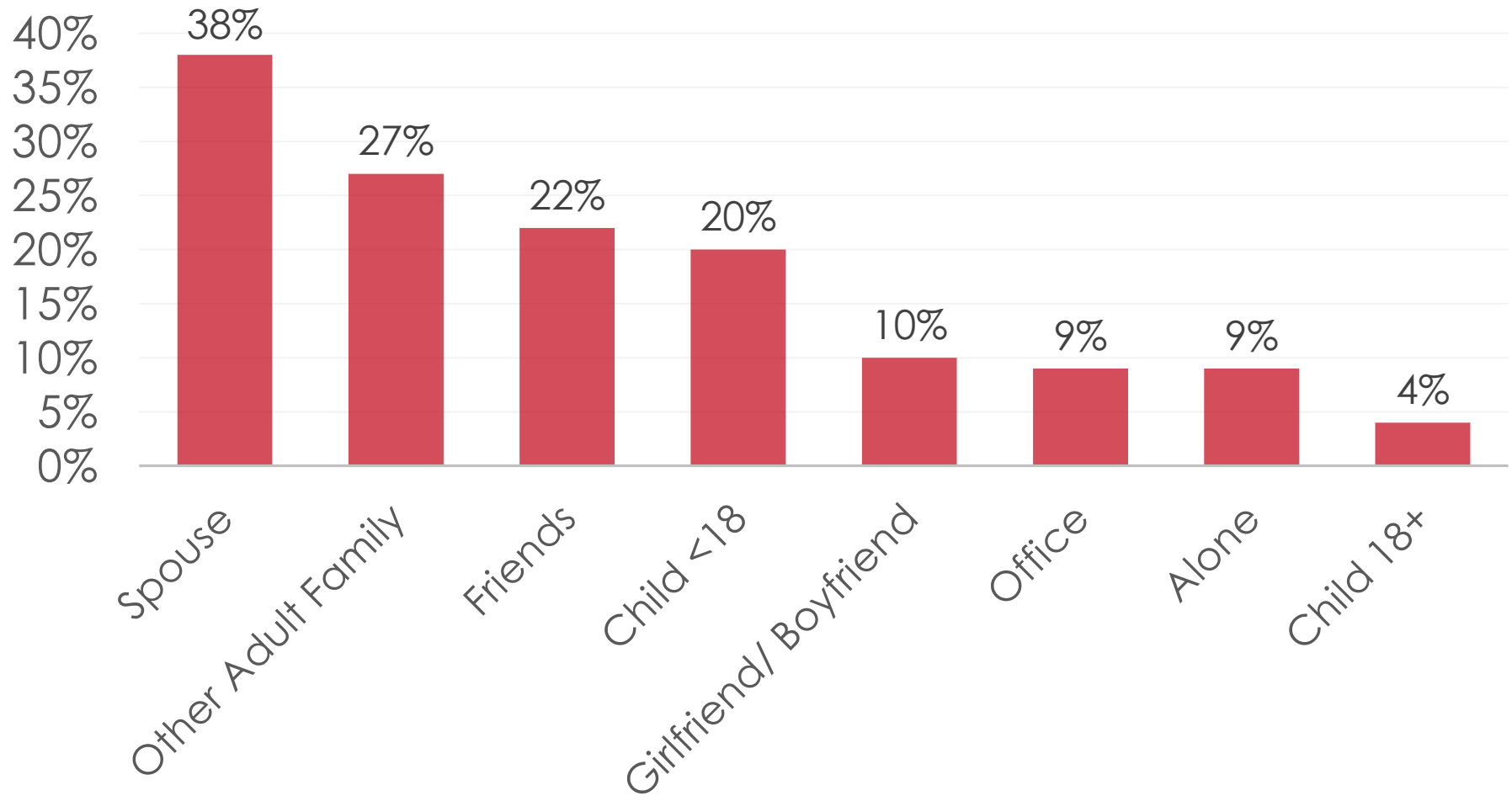
Annual Household Income – Key Segments

GVB EXIT SURVEY
Q26 Household income:

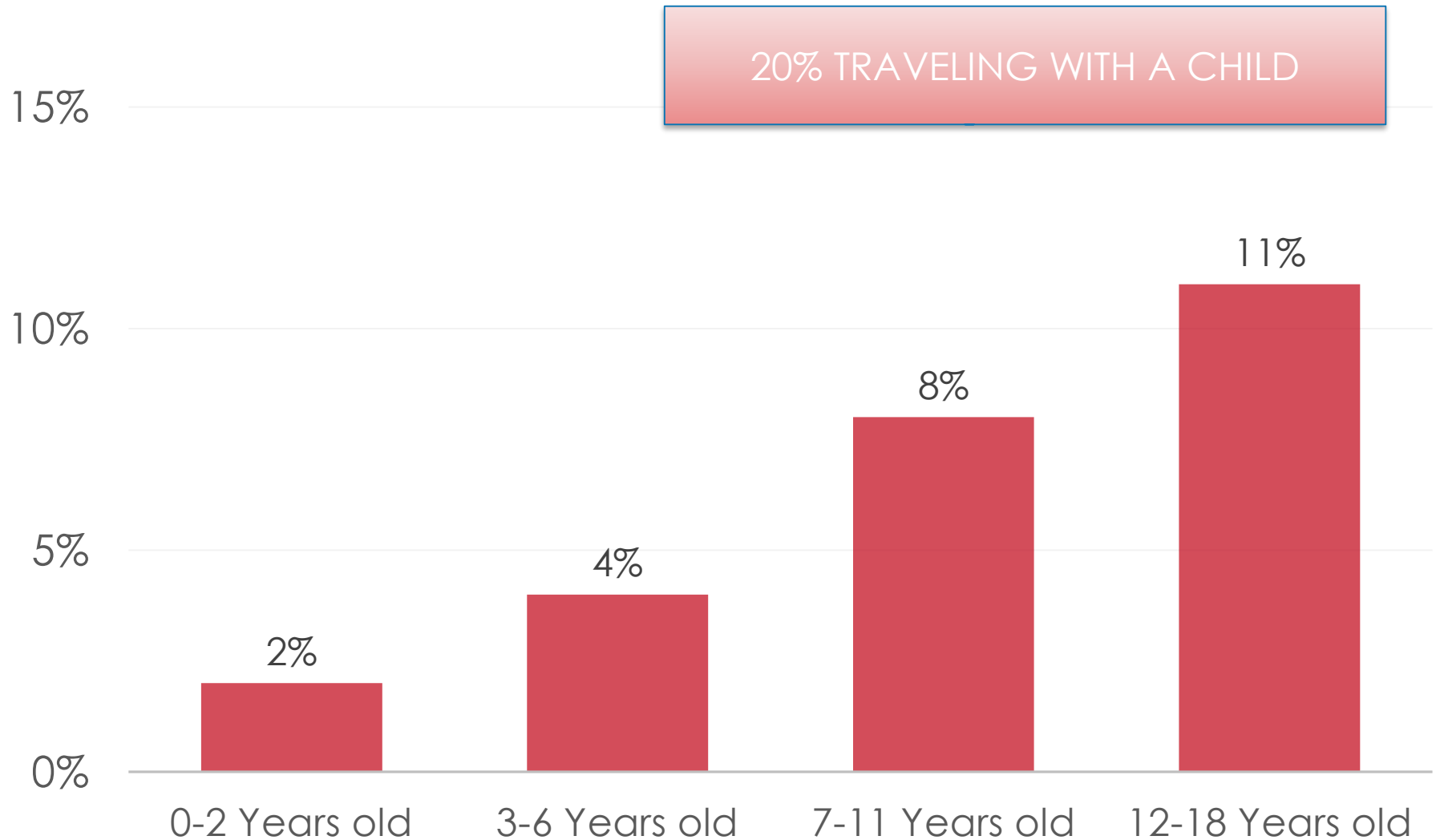
		TOTAL	MICE	SPORT/ ADV	WEDDING	HONEYMOON
		-	-	-	-	-
Q26	Less than NT160K	4%		2%		
	NT160K-NT200K	9%		10%	50%	29%
	NT200K-NT400K	22%	33%	16%		29%
	NT400K-NT600K	19%		19%		29%
	NT600K-NT800K	27%	33%	33%		14%
	NT800K-NT1.0M	9%		11%	50%	
	NT1.0M+	7%		6%		
	No Income	3%	33%	3%		
	Total	180	3	100	2	7

Prepared by Anthology Research

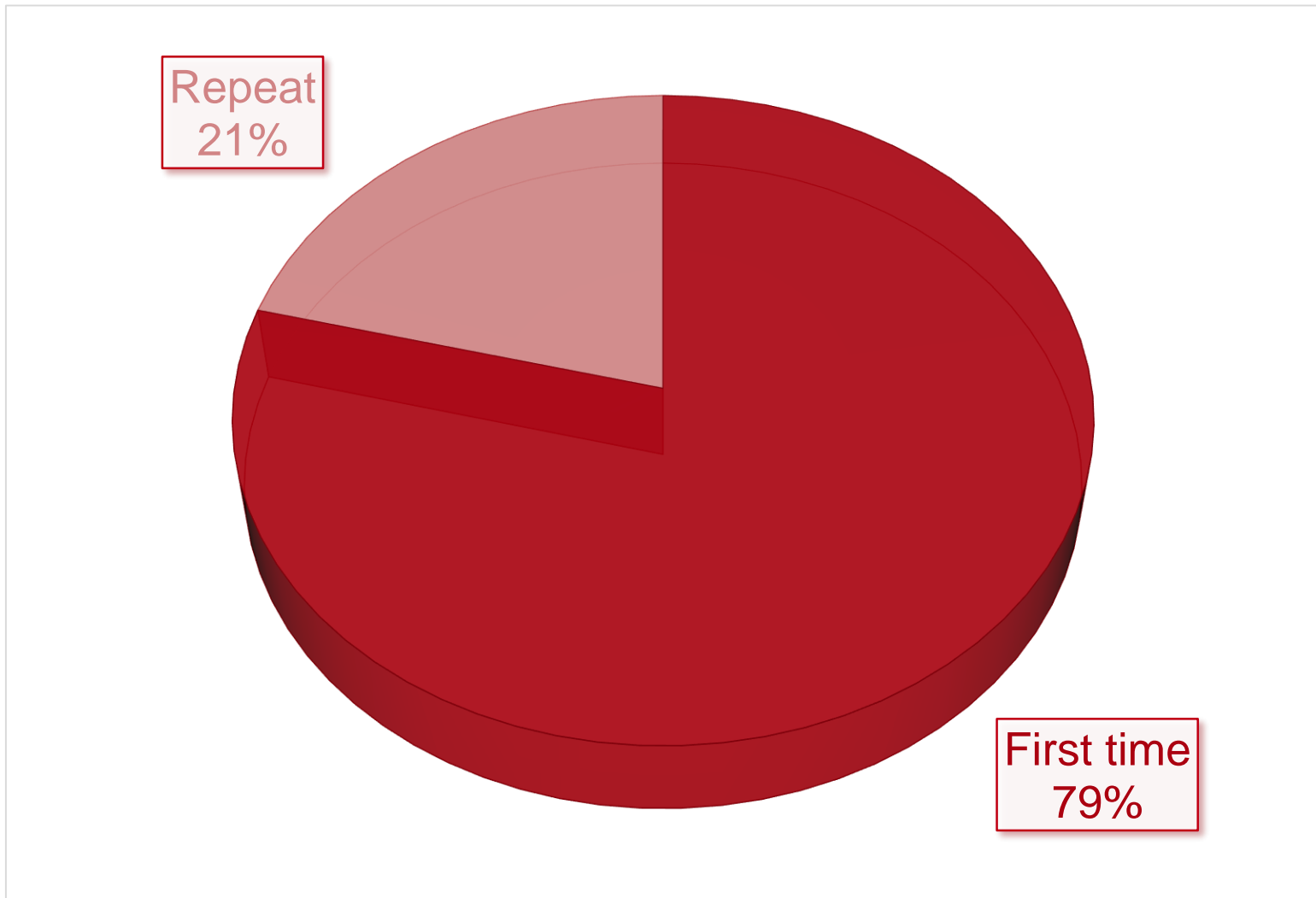
Travel Party



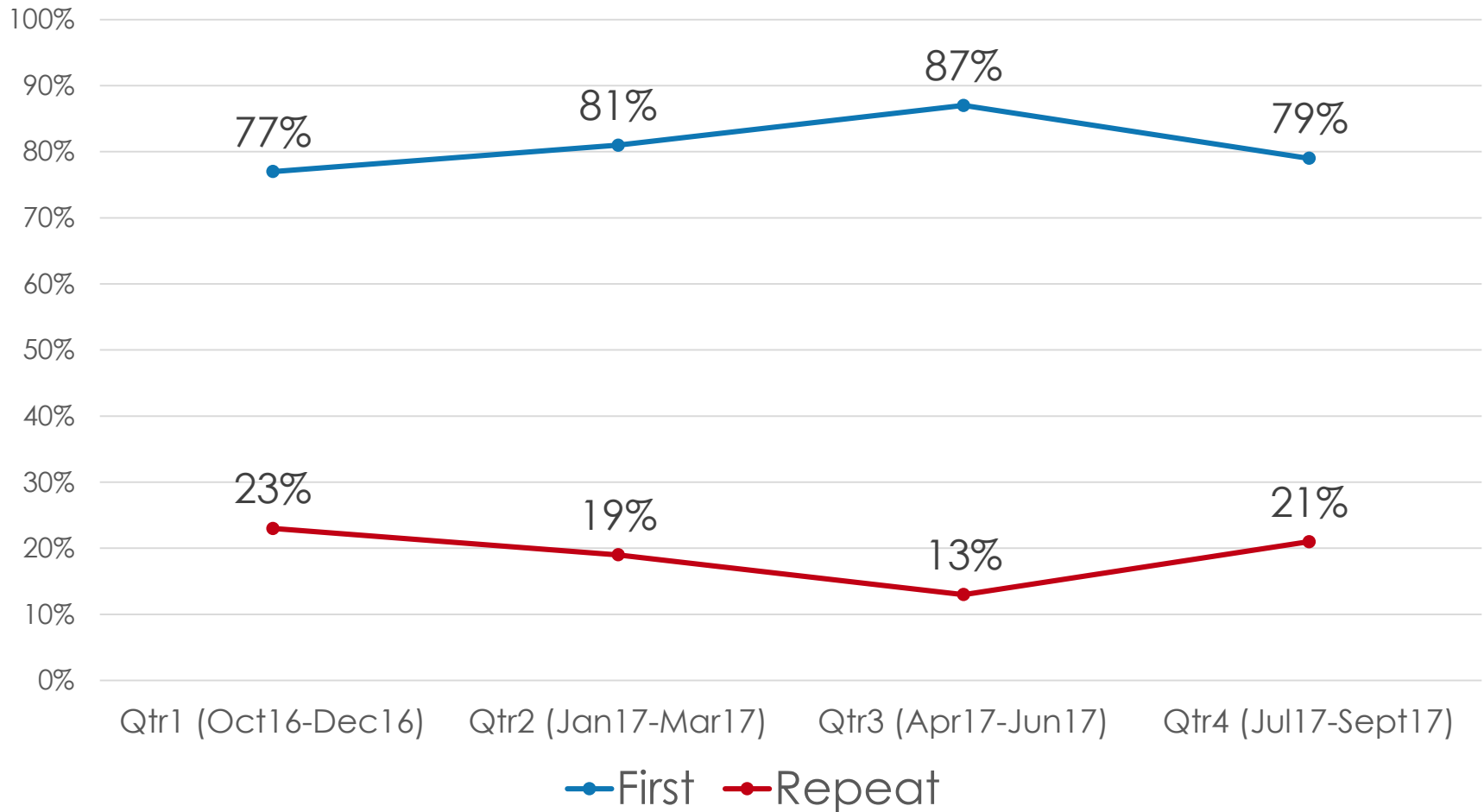
Travel Party - Children



Trips to Guam



Trips to Guam – FY2017 Tracking



Trips to Guam – Key Segments

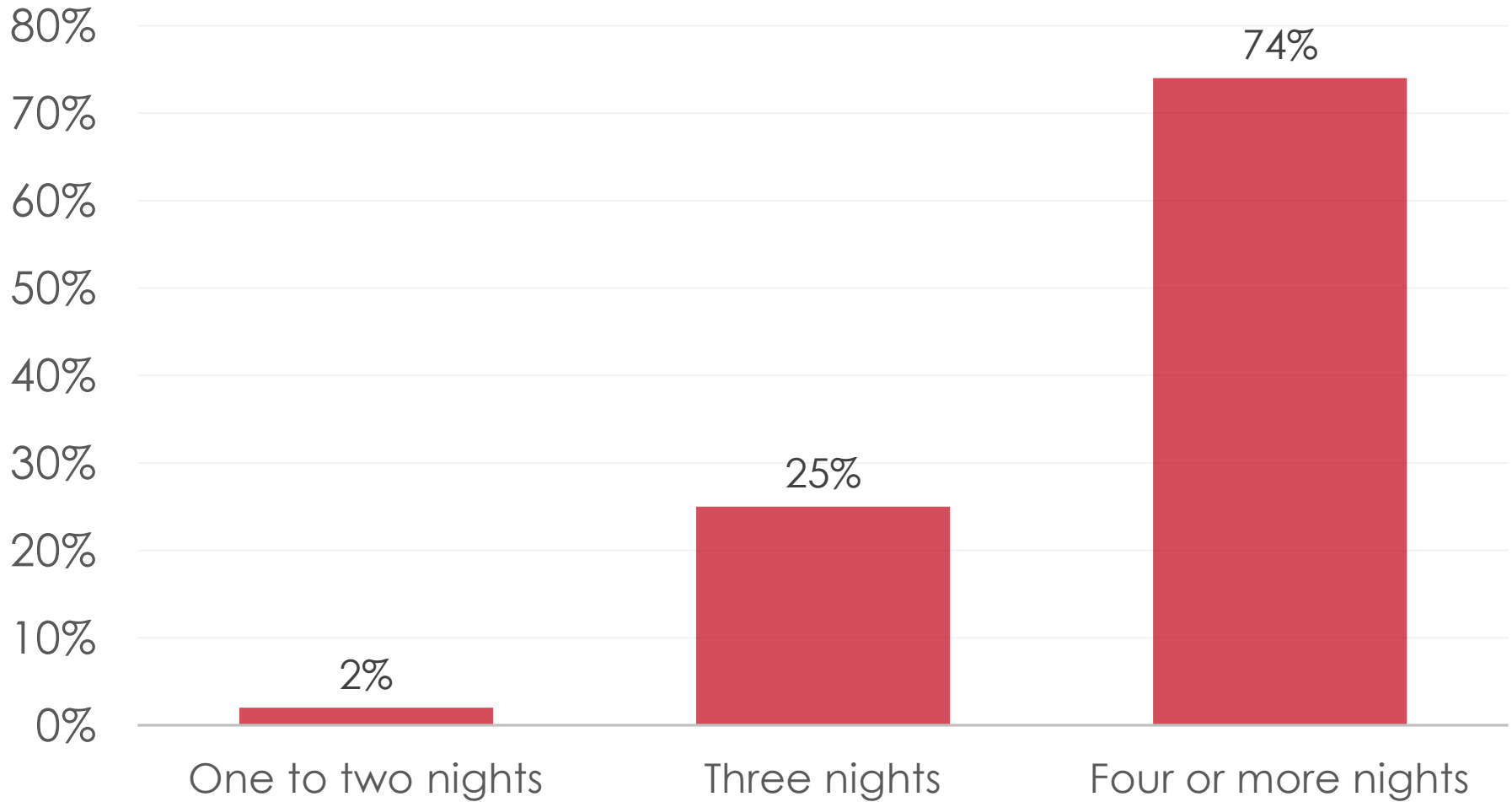
GVB EXIT SURVEY
Q3 Including this trip, how many times have you visited Guam?

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOON
		-	-	-	-	-
Q3	1st Time	79%	100%	83%	100%	71%
	Repeat	21%		17%		29%
	Total	183	3	102	2	7
Q3A	Mean	1.54	1.00	1.42	1.00	1.57
	Median	1	1	1	1	1

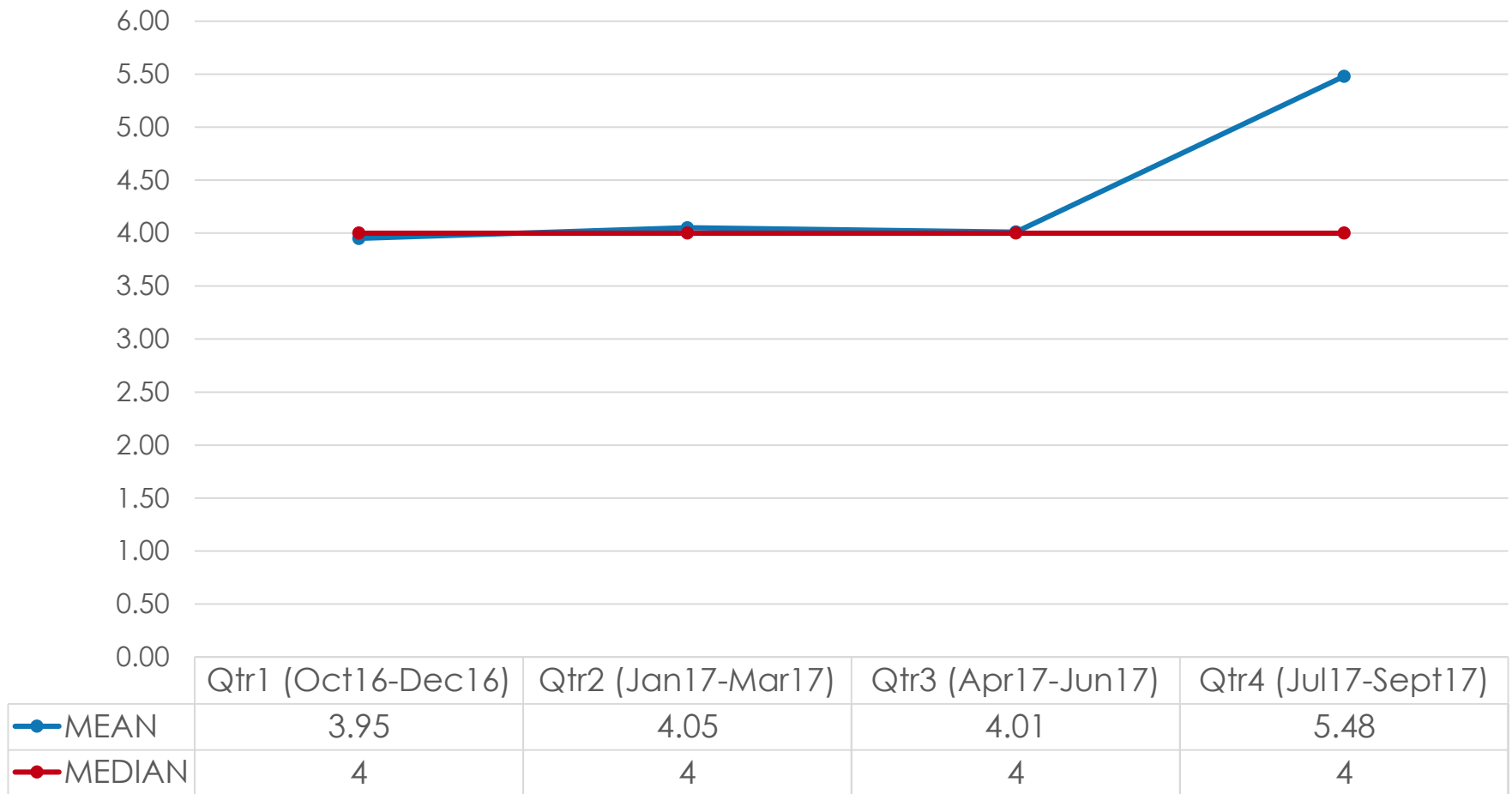
Prepared by Anthology Research

Length of Stay

MEAN NUMBER OF NIGHTS = 5.48
MEDIAN NUMBER OF NIGHTS = 4



Length of Stay – FY2017 Tracking



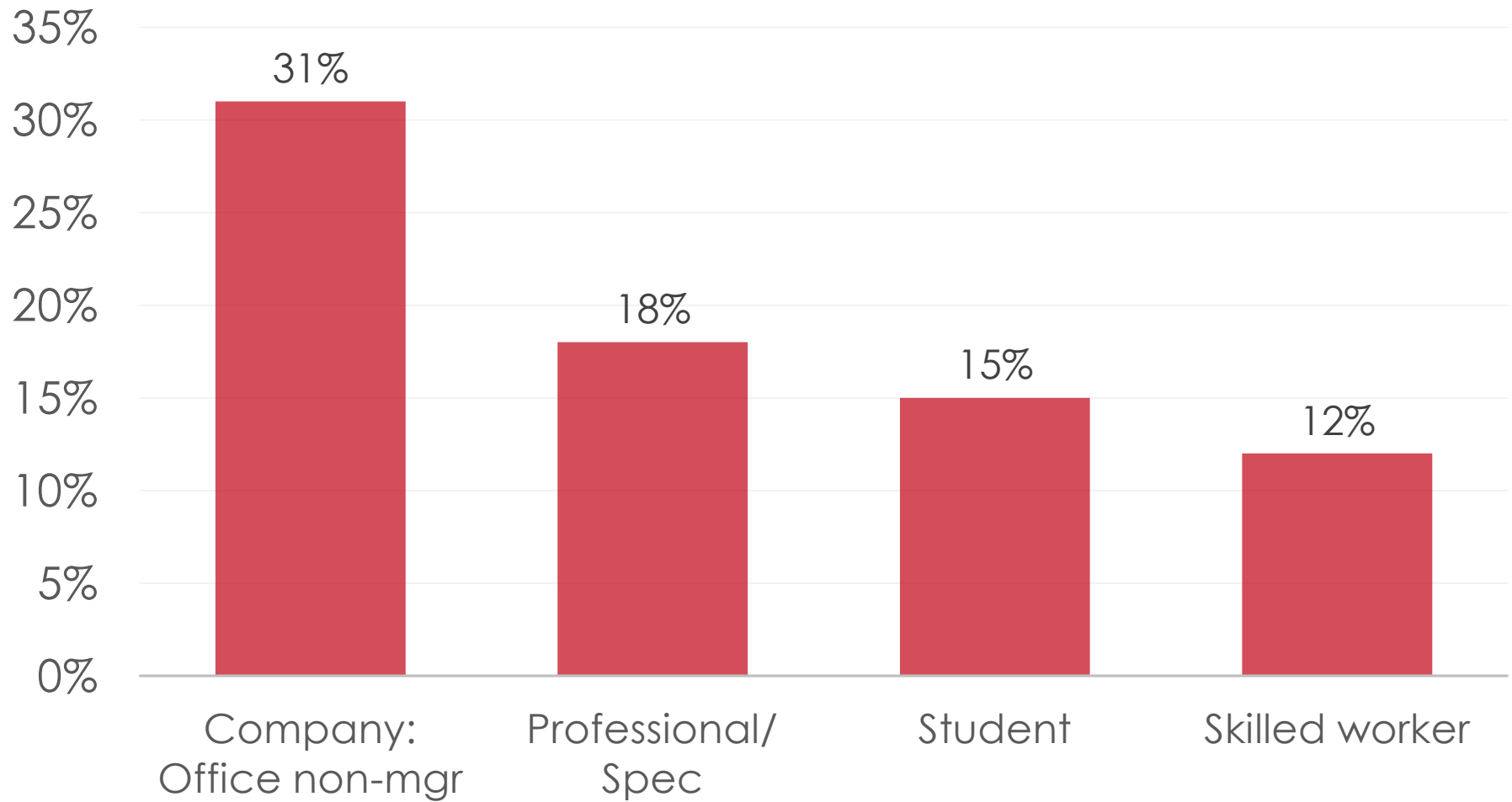
Length of Stay – Key Segments

GVB EXIT SURVEY
SA How many nights did you stay on Guam?

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOON
		-	-	-	-	-
SA	1-2	2%		1%		
	3	25%		25%		29%
	4+	74%	100%	74%	100%	71%
	Total	183	3	102	2	7
SA	Mean	5.48	11.00	5.48	4.00	7.00
	Median	4	4	4	4	4

Prepared by Anthology Research

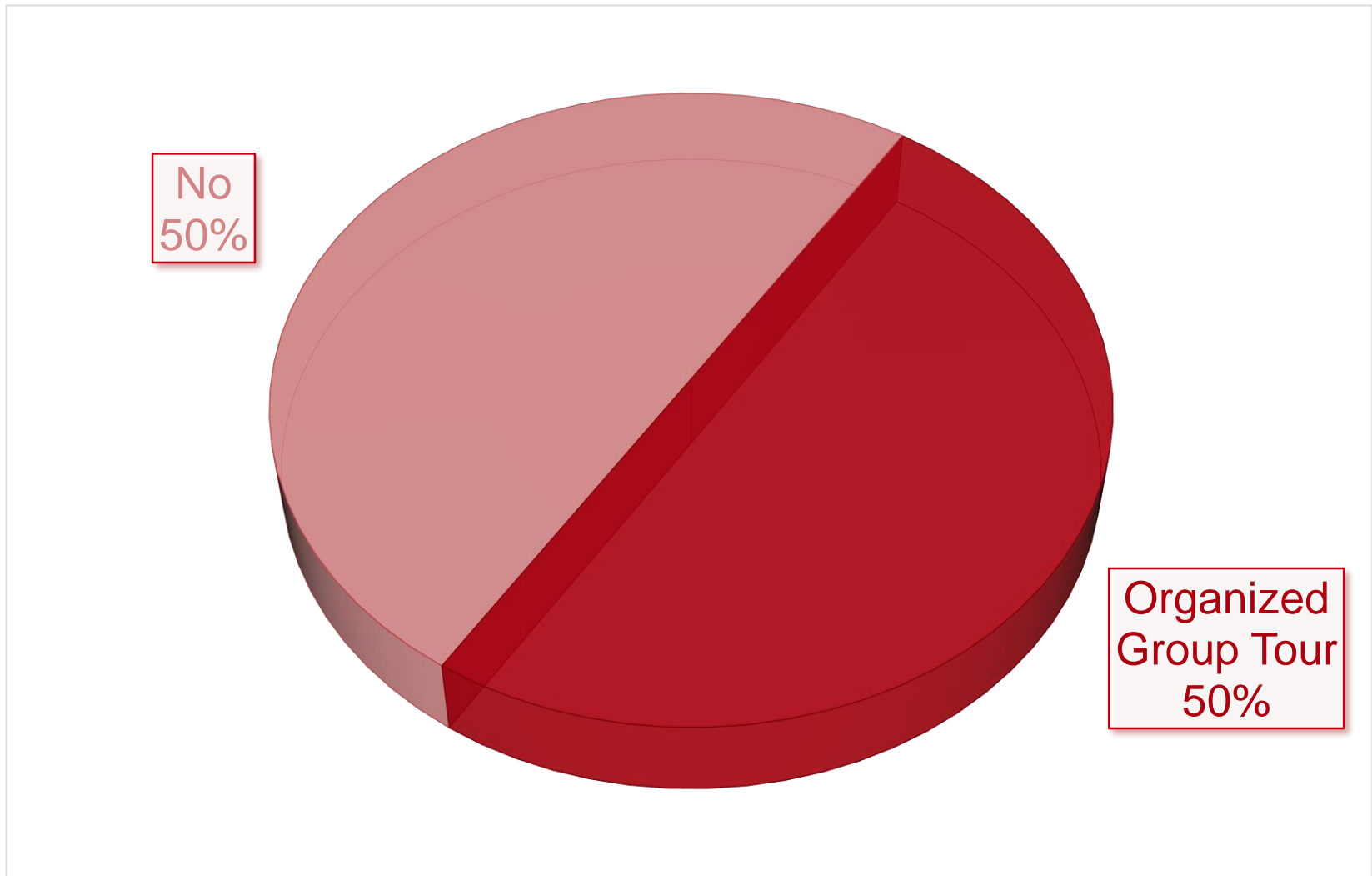
Occupation – Top Responses (10%+)



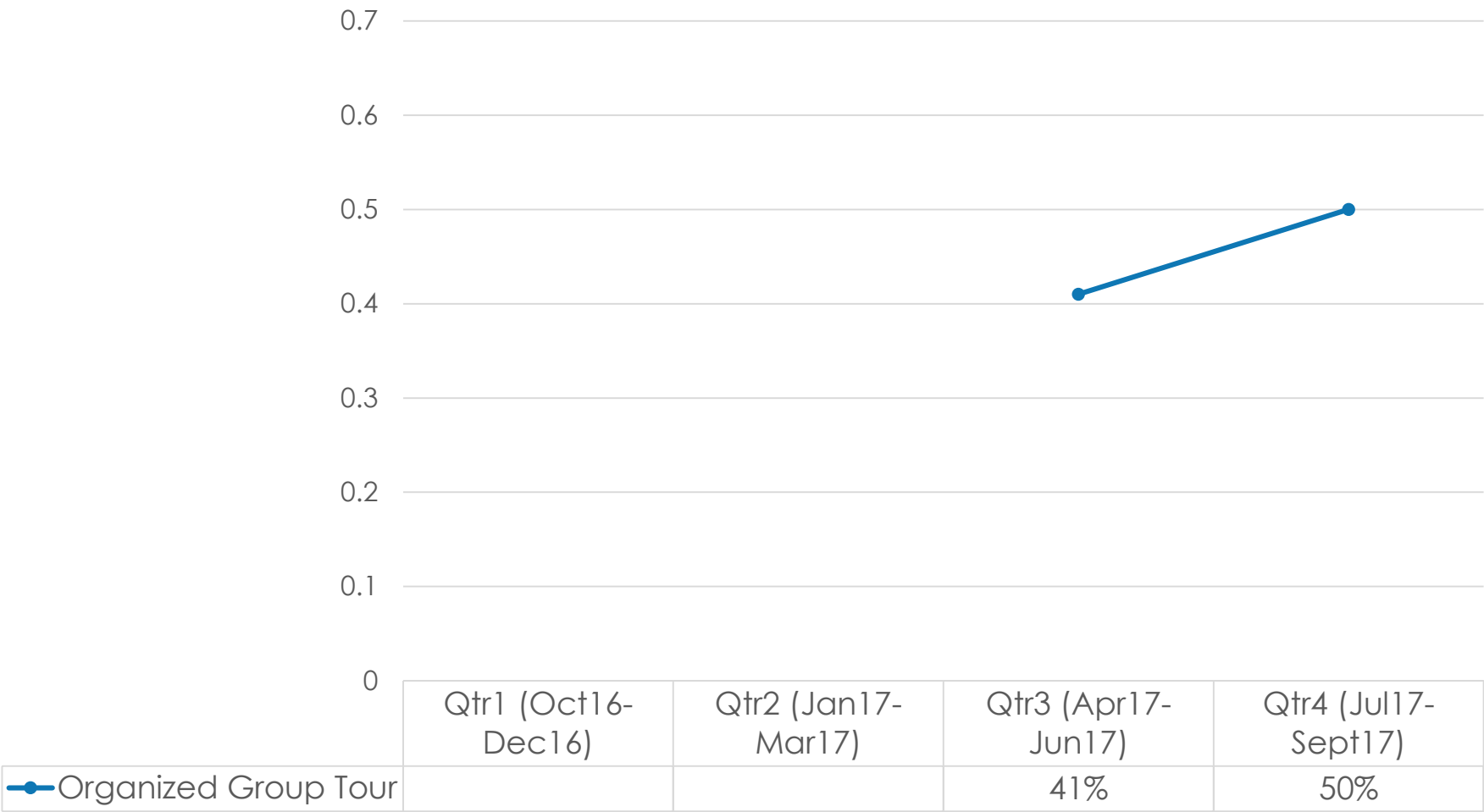
SECTION 2

TRAVEL PLANNING

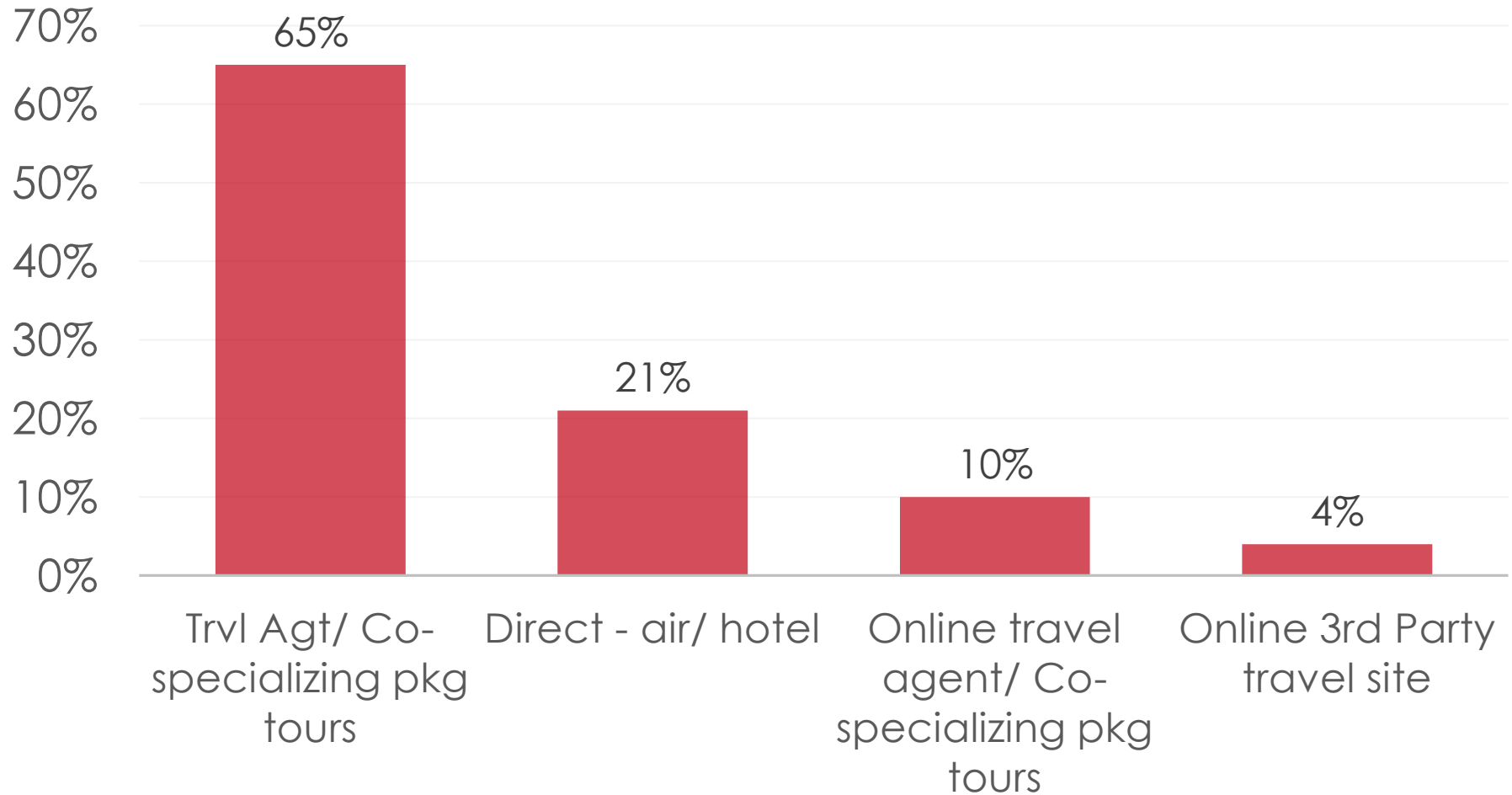
Organized Group Tour



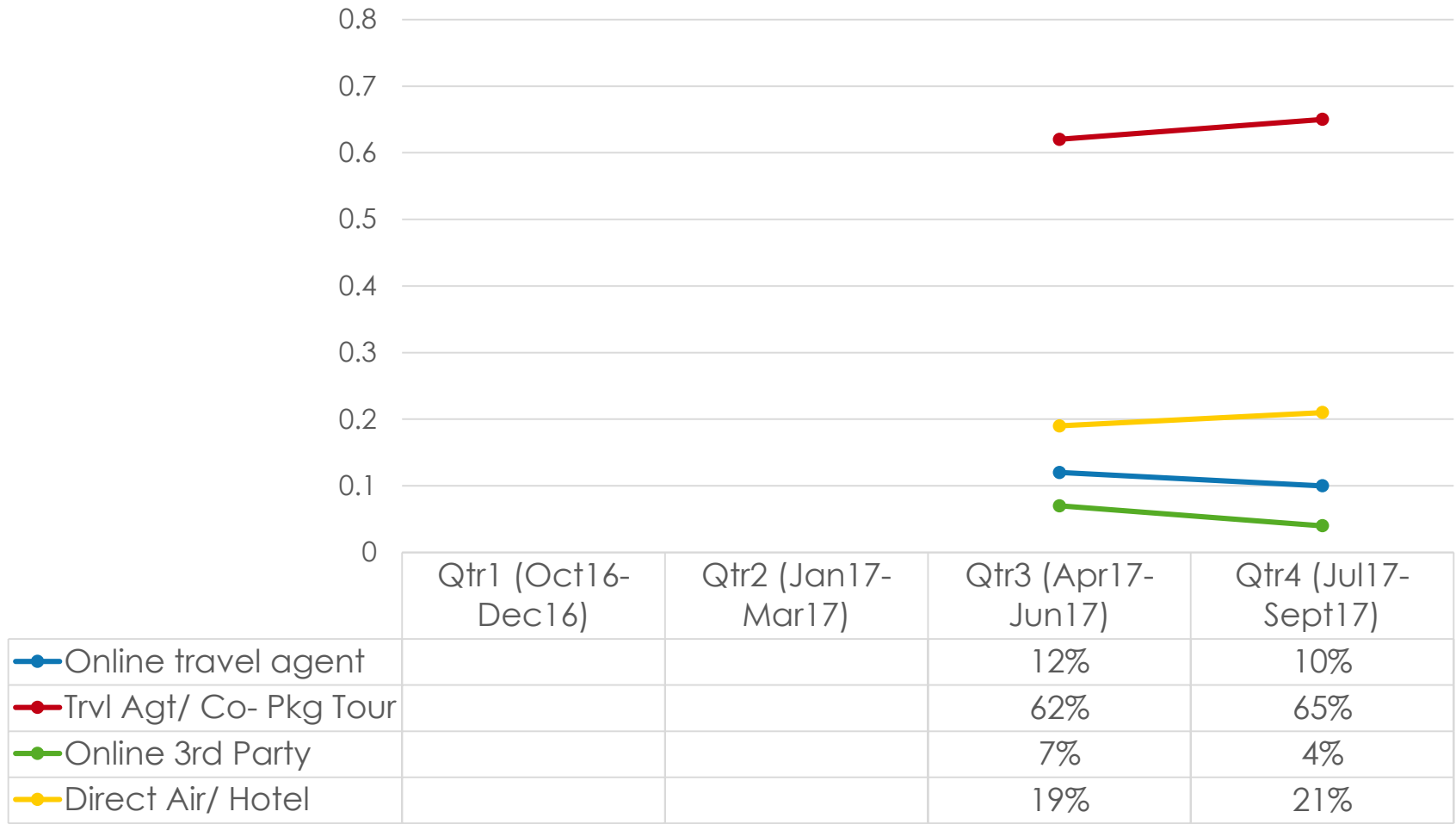
Organized Group Tour



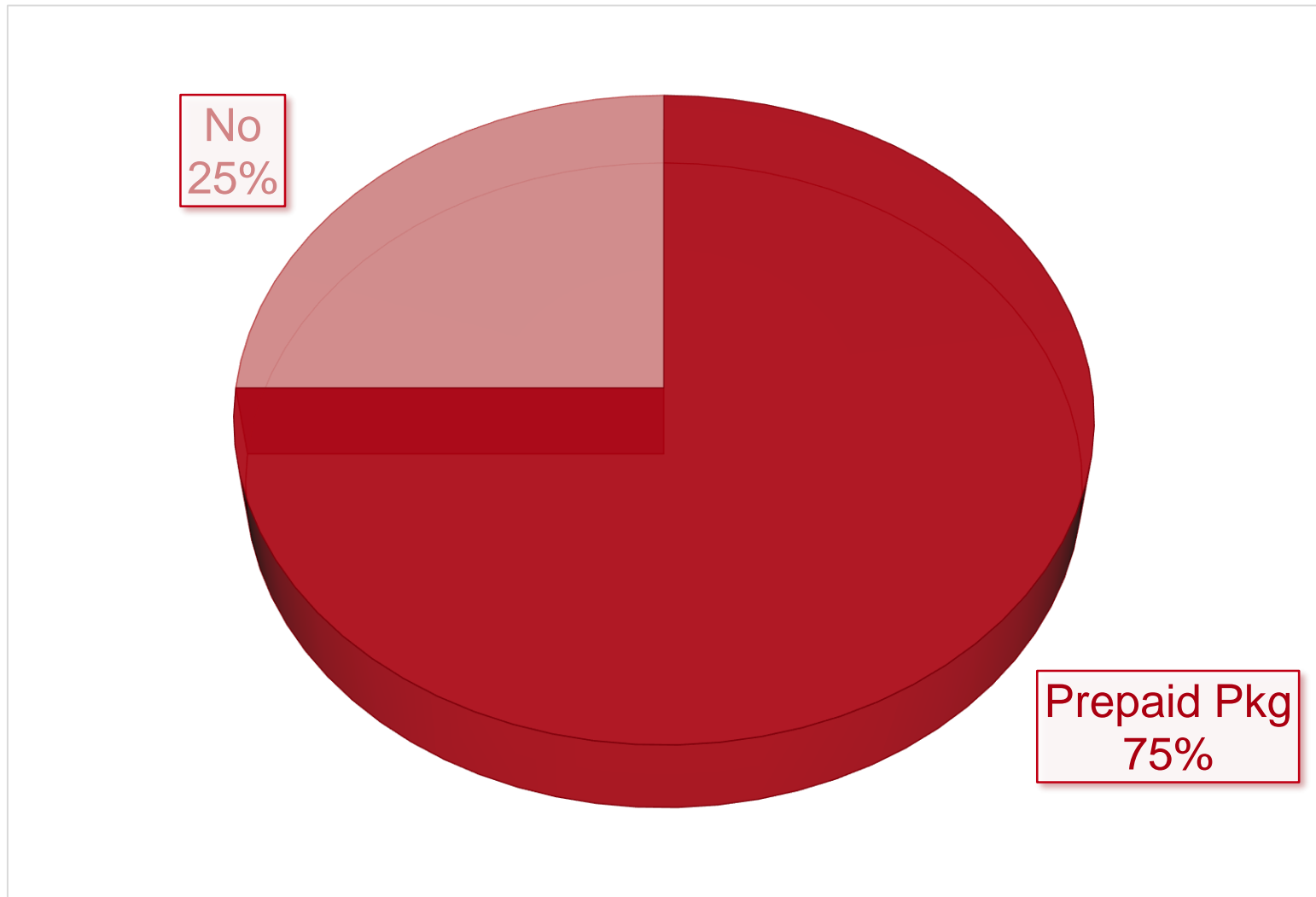
Travel Arrangements - Sources



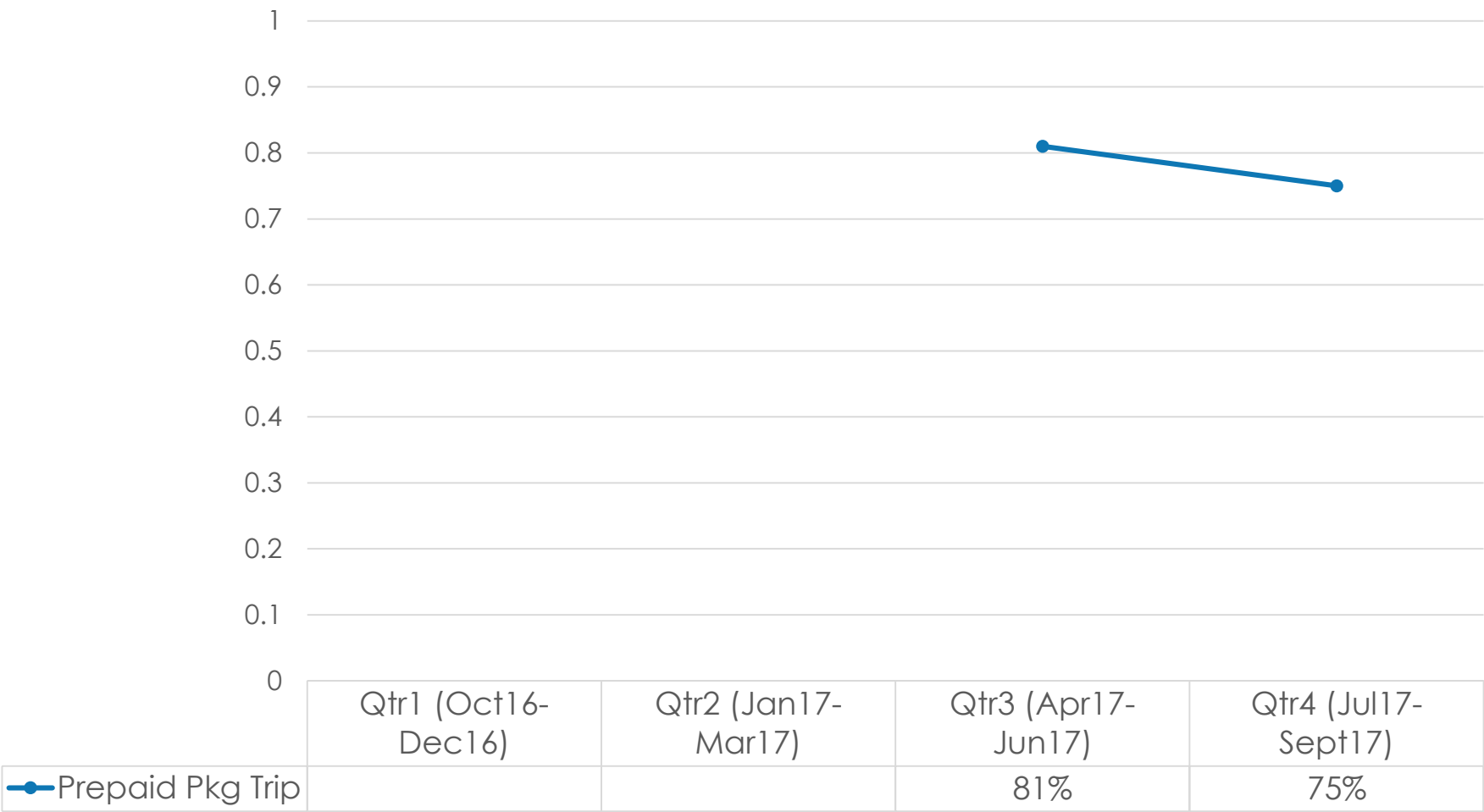
Travel Arrangements - Sources



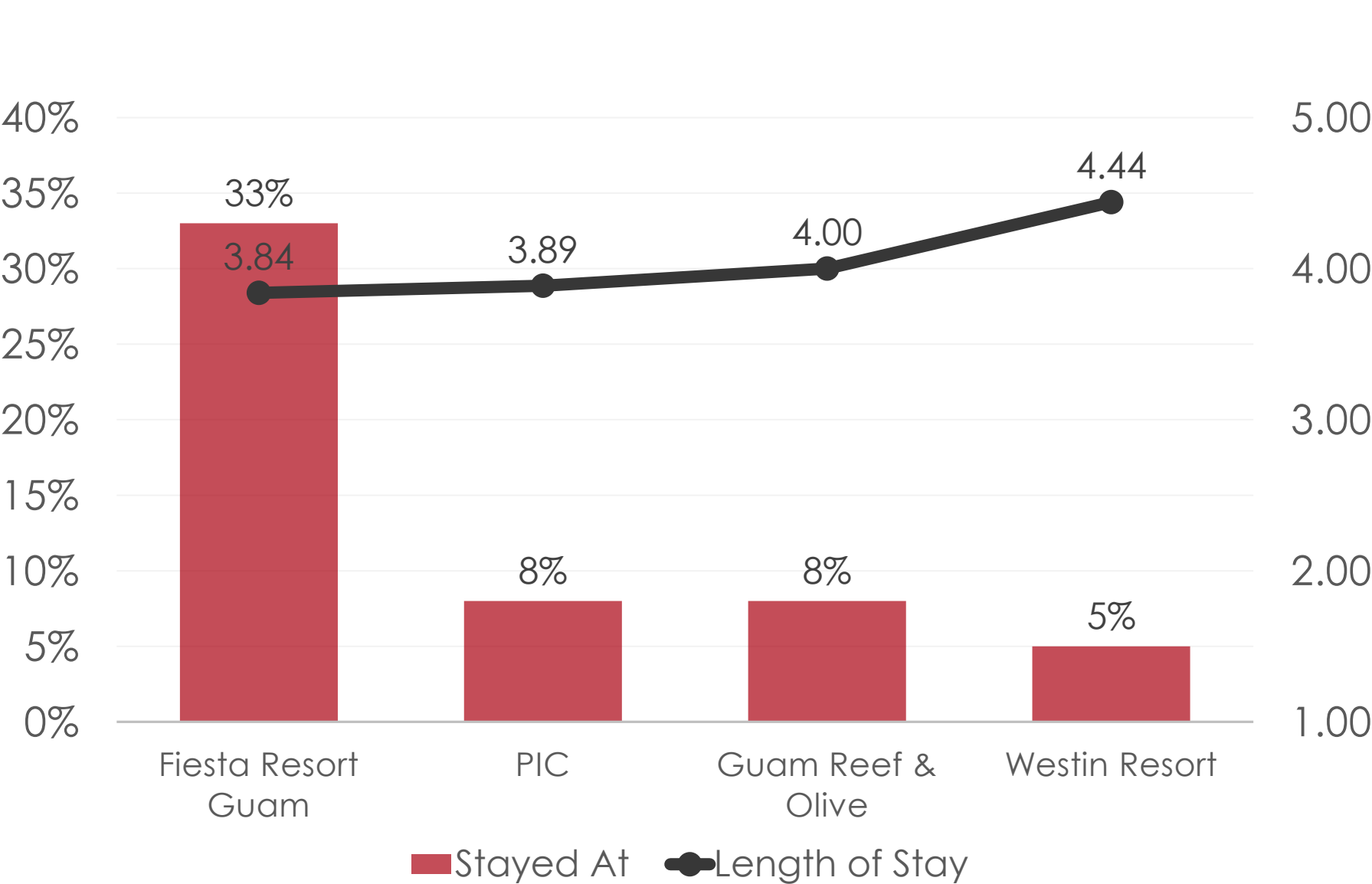
Prepaid Package Trip



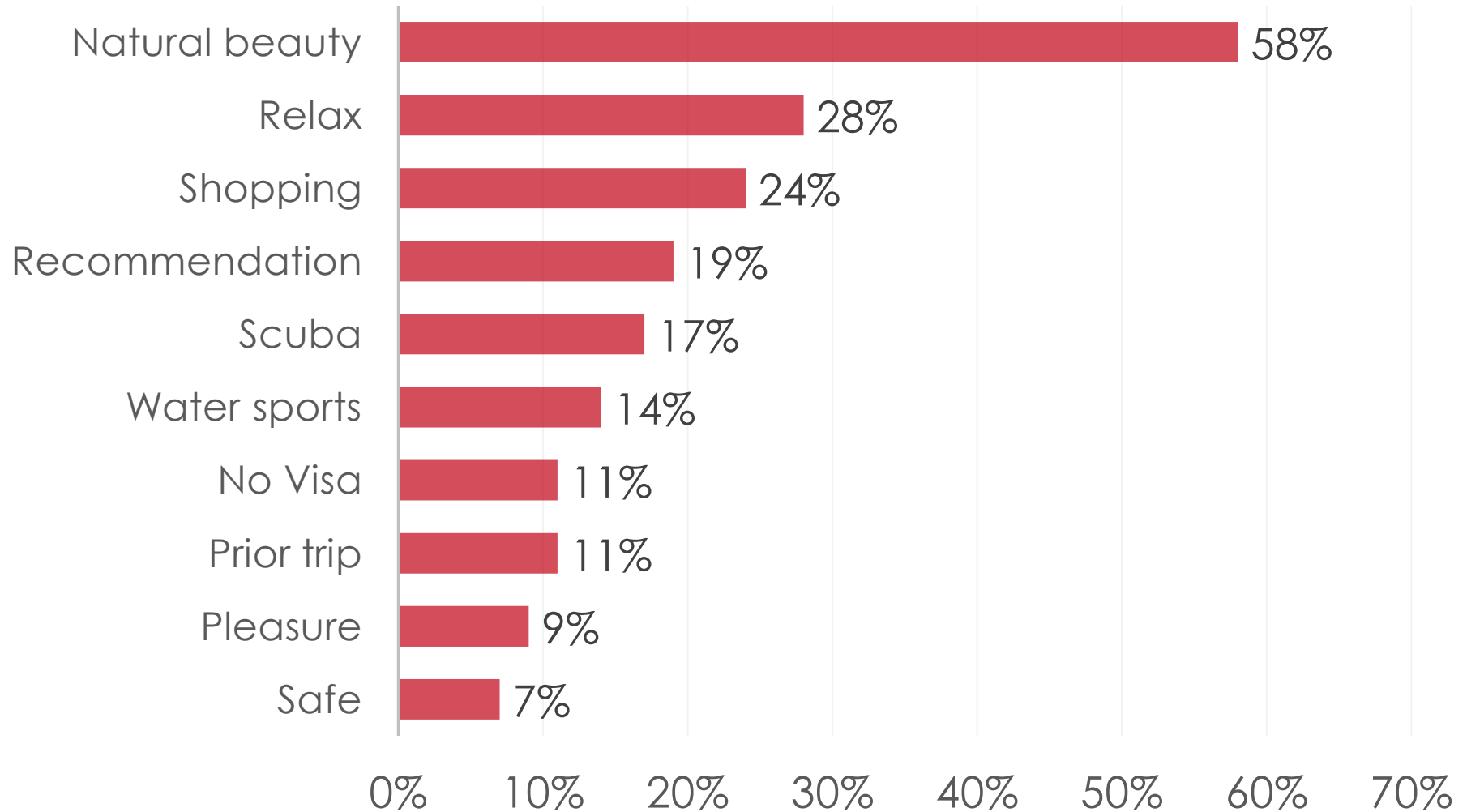
Prepaid Package Trip



Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Key Segments

GVB EXIT SURVEY
Q5A Please select the top three reasons that motivated you to travel to Guam?

		TOTAL	MICE	SPORT/ ADV	WEDDING	HONEYMOON
		-	-	-	-	-
Q5A	Beautiful seas, beaches, tropical climate	58%	33%	64%	50%	57%
	Just to relax	28%	67%	34%		14%
	Shopping	24%		25%		43%
	Recommendation of friend/ relative/ travel agency	19%		15%		29%
	Scuba diving	17%		30%		
	Water sports (snorkeling, windsurfing, parasailing)	14%		25%		
	No Visa required	11%		11%		14%
	A previous visit	11%		7%		29%
	Pleasure/ vacation	9%		5%		
	It is a safe place to spend a vacation	7%		4%		
	Company/ business trip	5%		4%		
	Price of the tour package	4%		4%		
	Honeymoon	4%		5%		100%
	Career certification/ testing	3%		1%		
	To visit friends or relatives	3%		3%		
	Short travel time (not too far from home)	3%		3%	50%	
	Adventure	2%		4%		
	Incentive trip	2%	100%	2%		
	To Get Married/ attend Wedding	1%		2%	100%	
	My company sponsored me	1%		1%		
	School trip	1%		1%		
	Total	183	3	102	2	7

SECTION 3

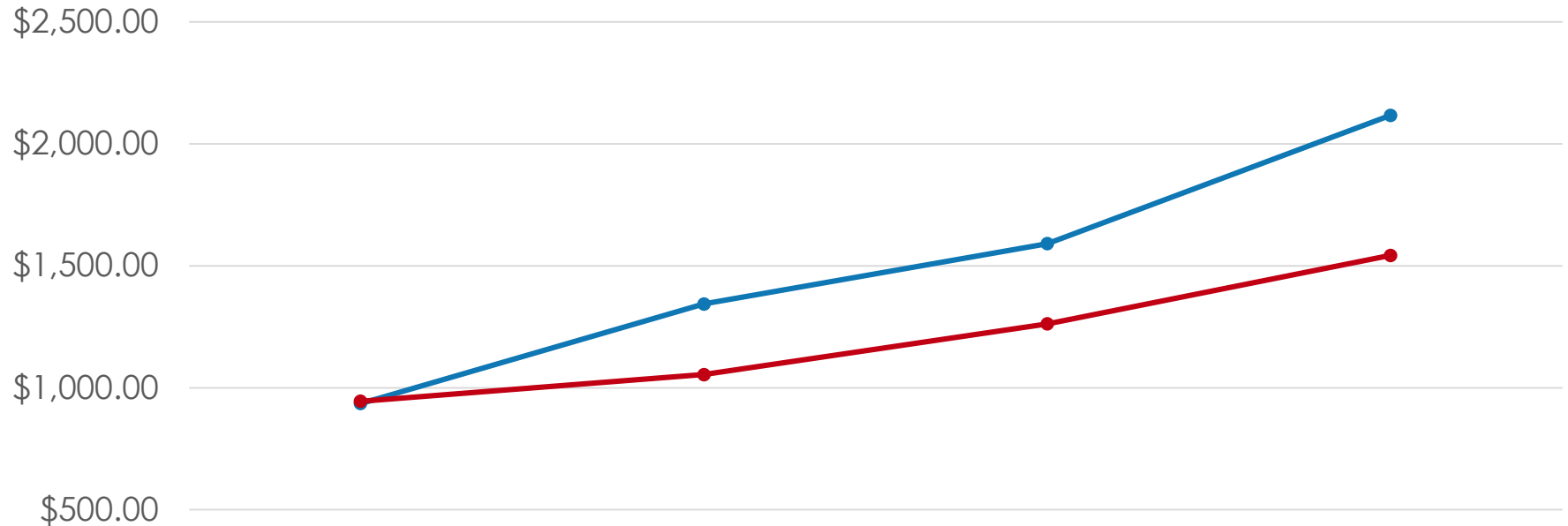
EXPENDITURES

Prepaid Expenditures

EXCHANGE RATE NT30.26=\$1

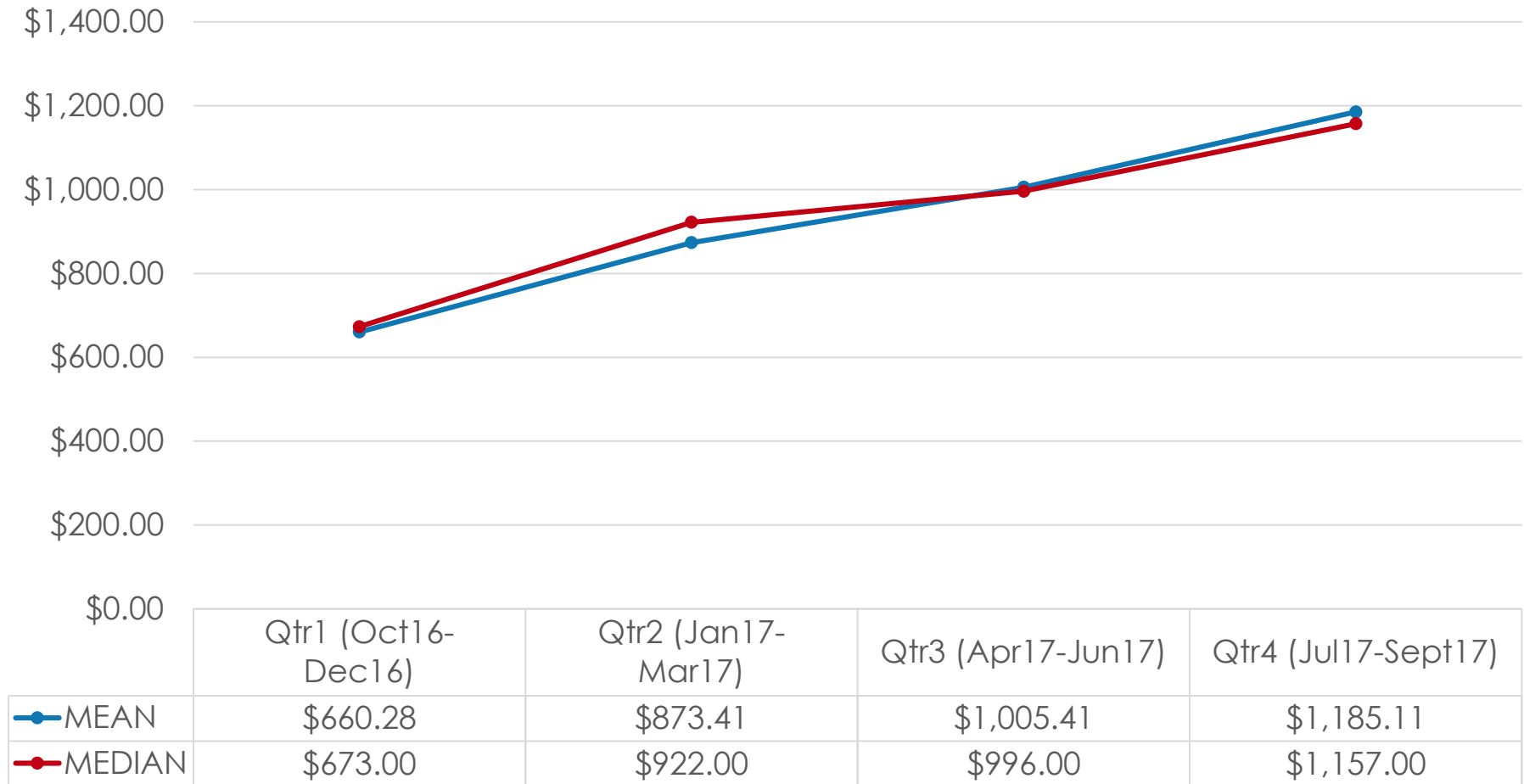
- \$2,117.39 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$1,185.11 = overall mean average per person prepaid expenditures

Prepaid Entire Travel Party – FY2017 Tracking



	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	\$935.76	\$1,343.70	\$1,590.80	\$2,117.39
MEDIAN	\$945.00	\$1,054.00	\$1,262.00	\$1,543.00

Prepaid Per Person– FY2017 Tracking



Prepaid Per Person– Key Segments

**GVB EXIT SURVEY
Q10A PREPAID - PER PERSON:**

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOON
		-	-	-	-	-
PREPAID PP	Mean	\$1,185.11	\$385.55	\$1,203.63	\$413.09	\$911.94
	Median	\$1,157	\$0	\$1,189	\$413	\$826

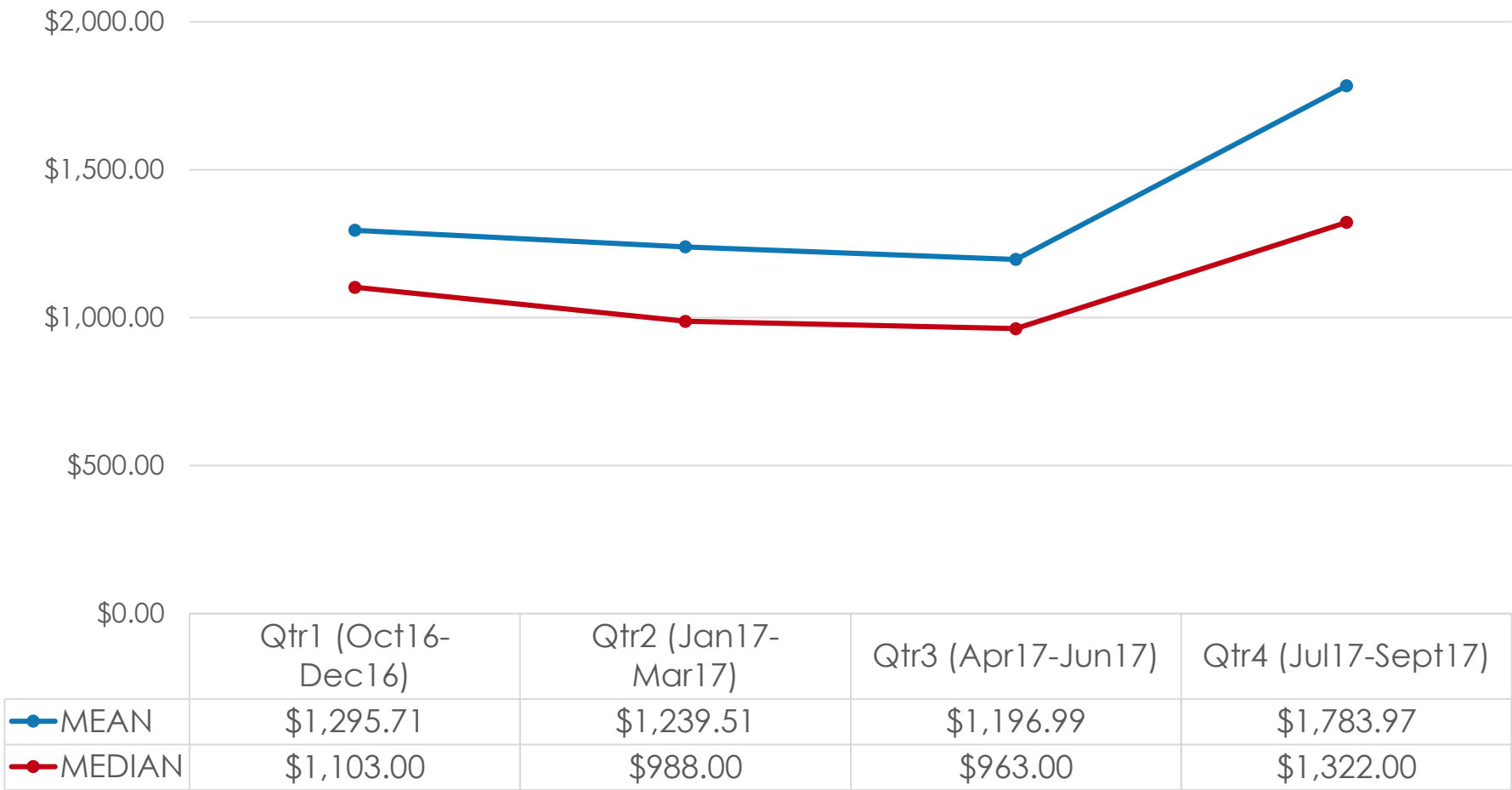
Prepared by Anthology Research

Prepaid Expenses by Category – MEAN Entire Travel Party



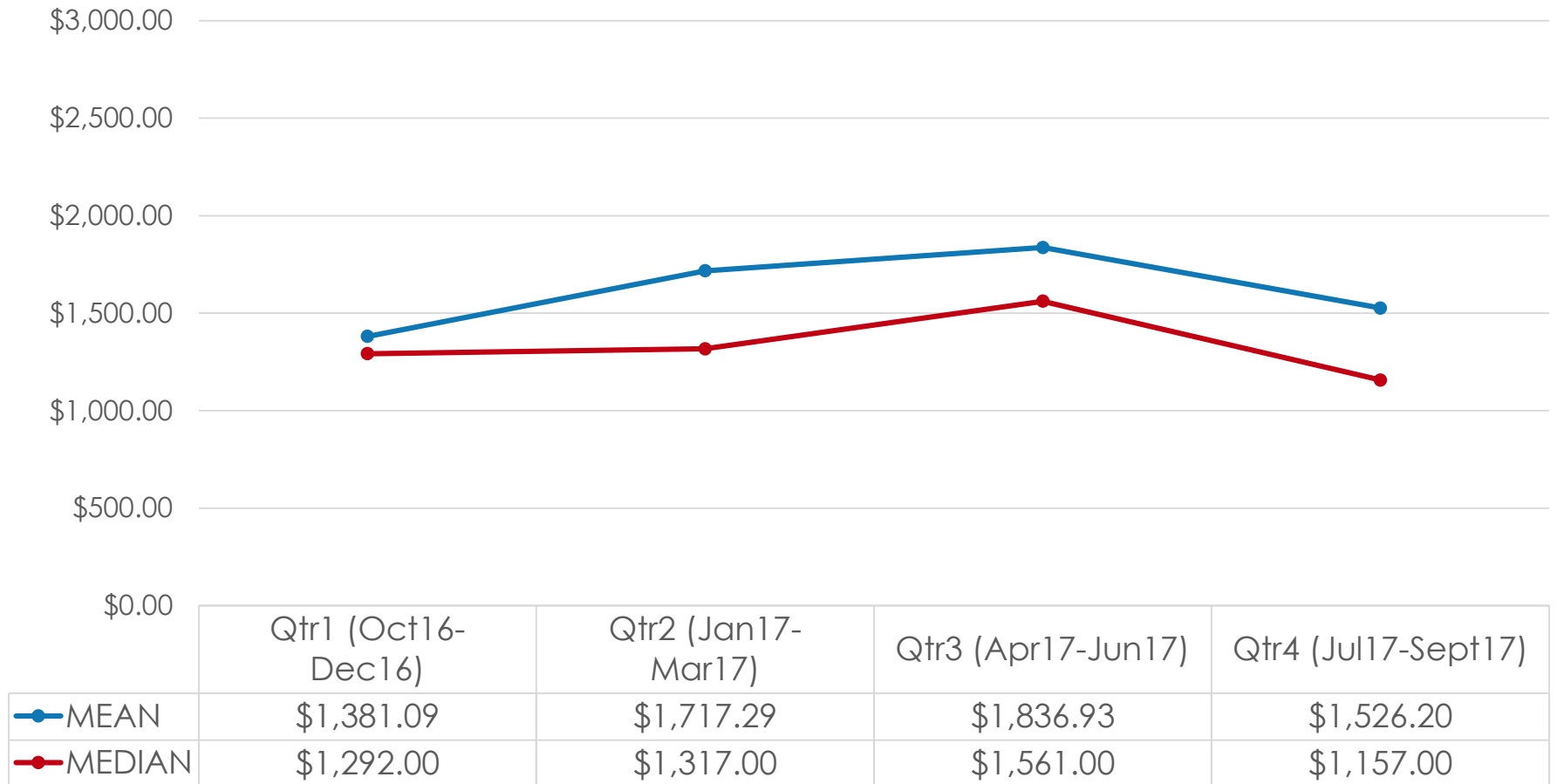
Prepaid– FY2017 Tracking

Airfare & Accommodation Packages



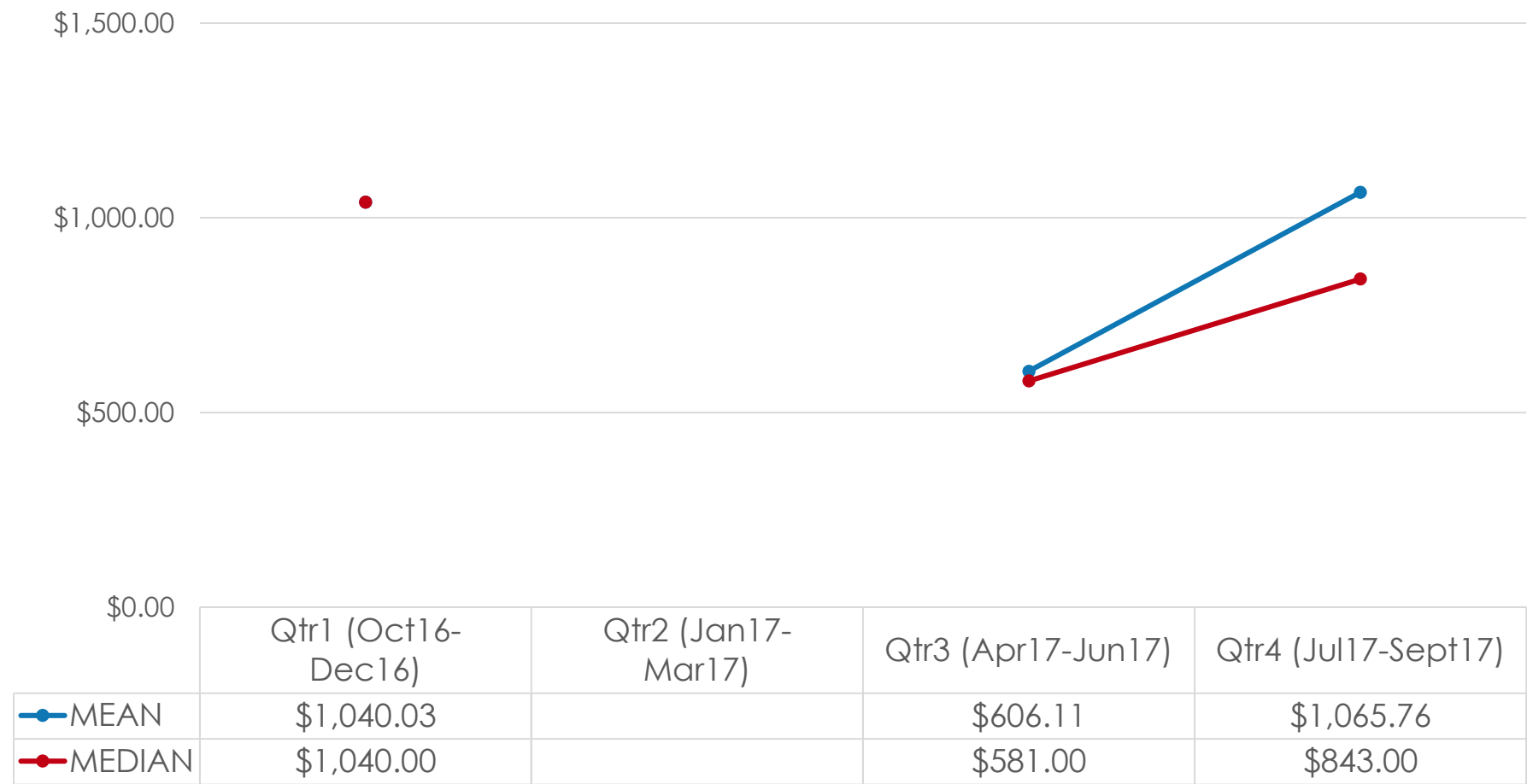
Prepaid– FY2017 Tracking

Airfare & Accommodation W/ Meal Packages

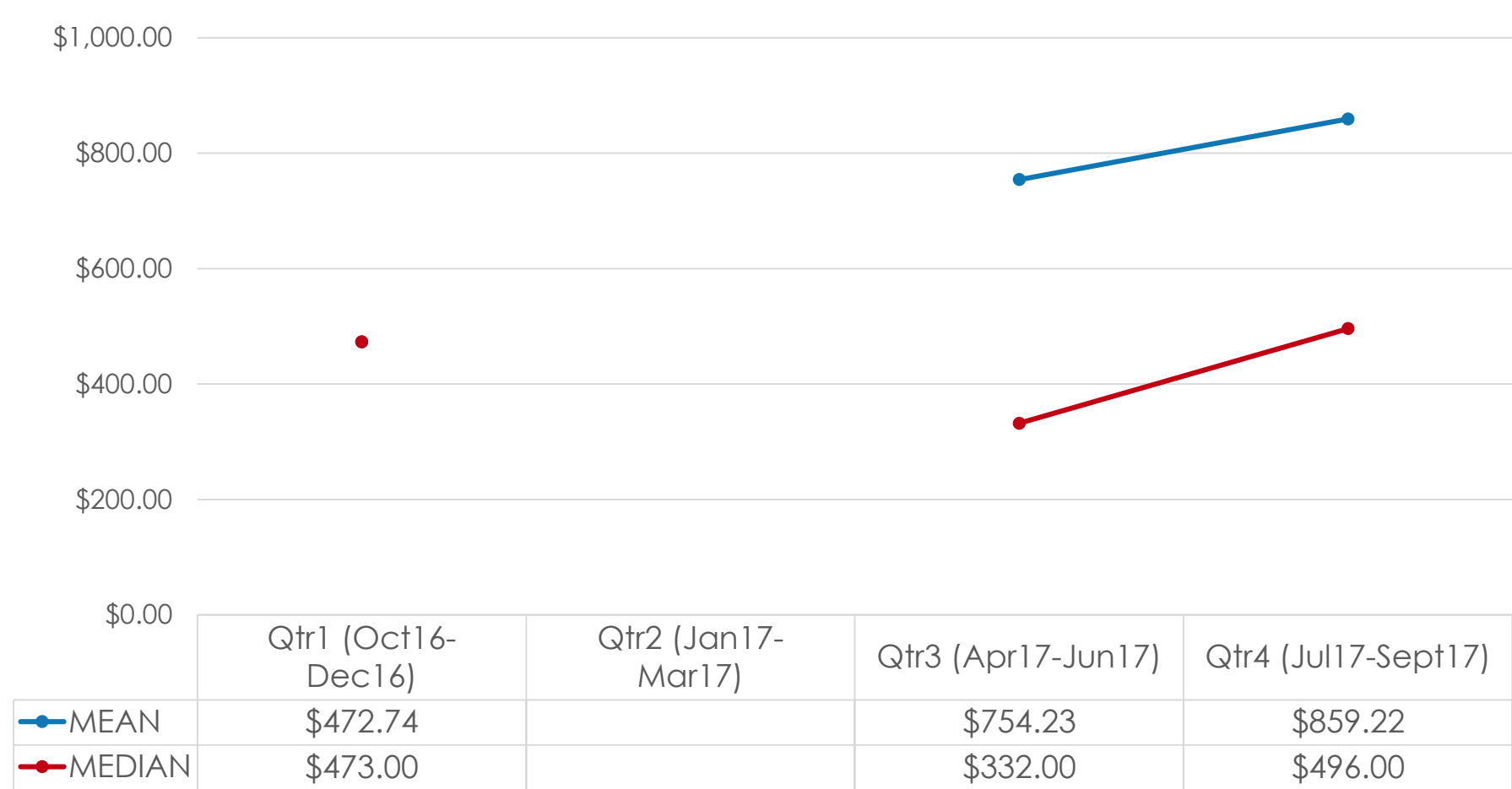


Prepaid– FY2017 Tracking

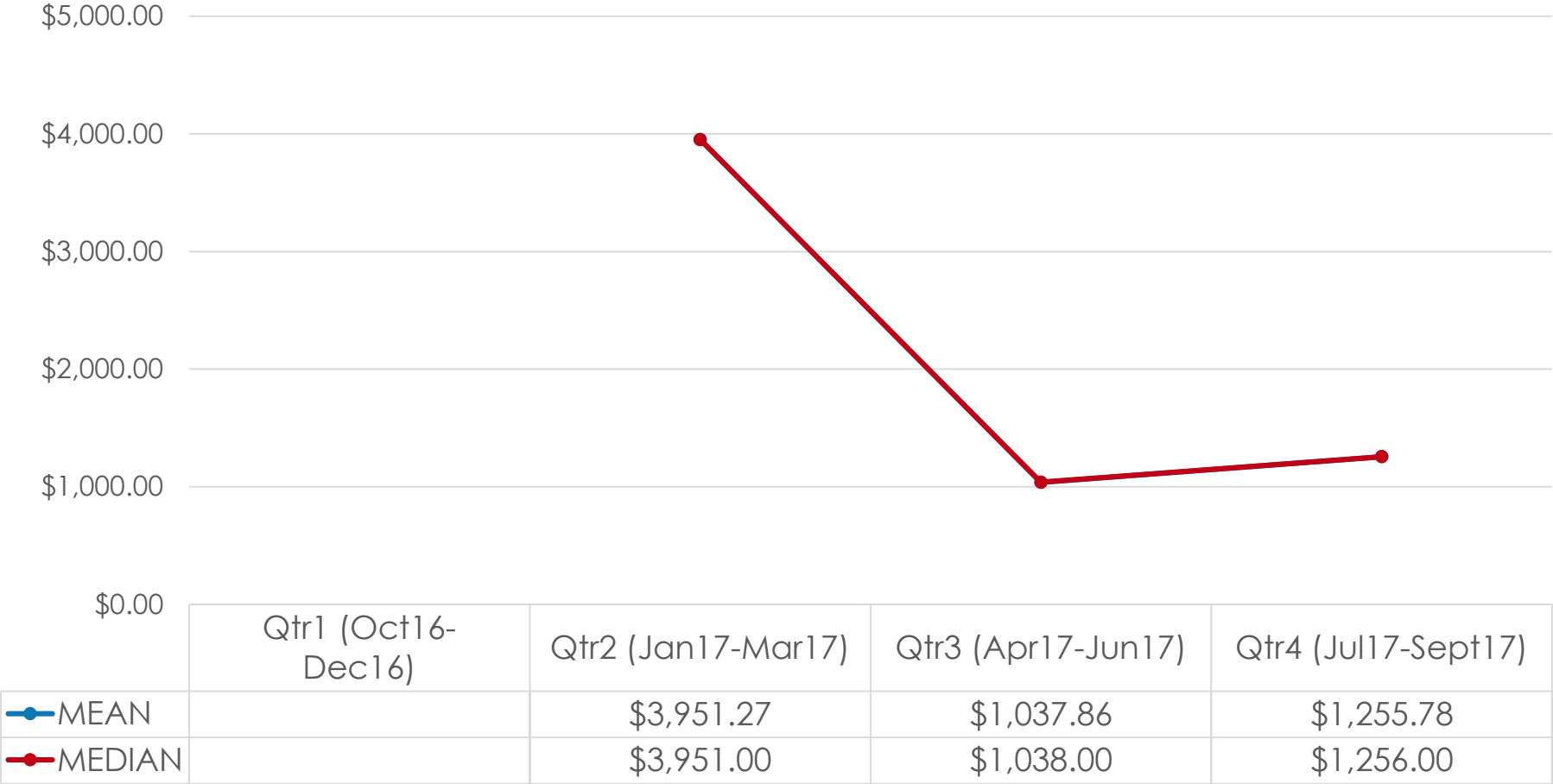
Airfare Only



Prepaid– FY2017 Tracking Accommodations Only

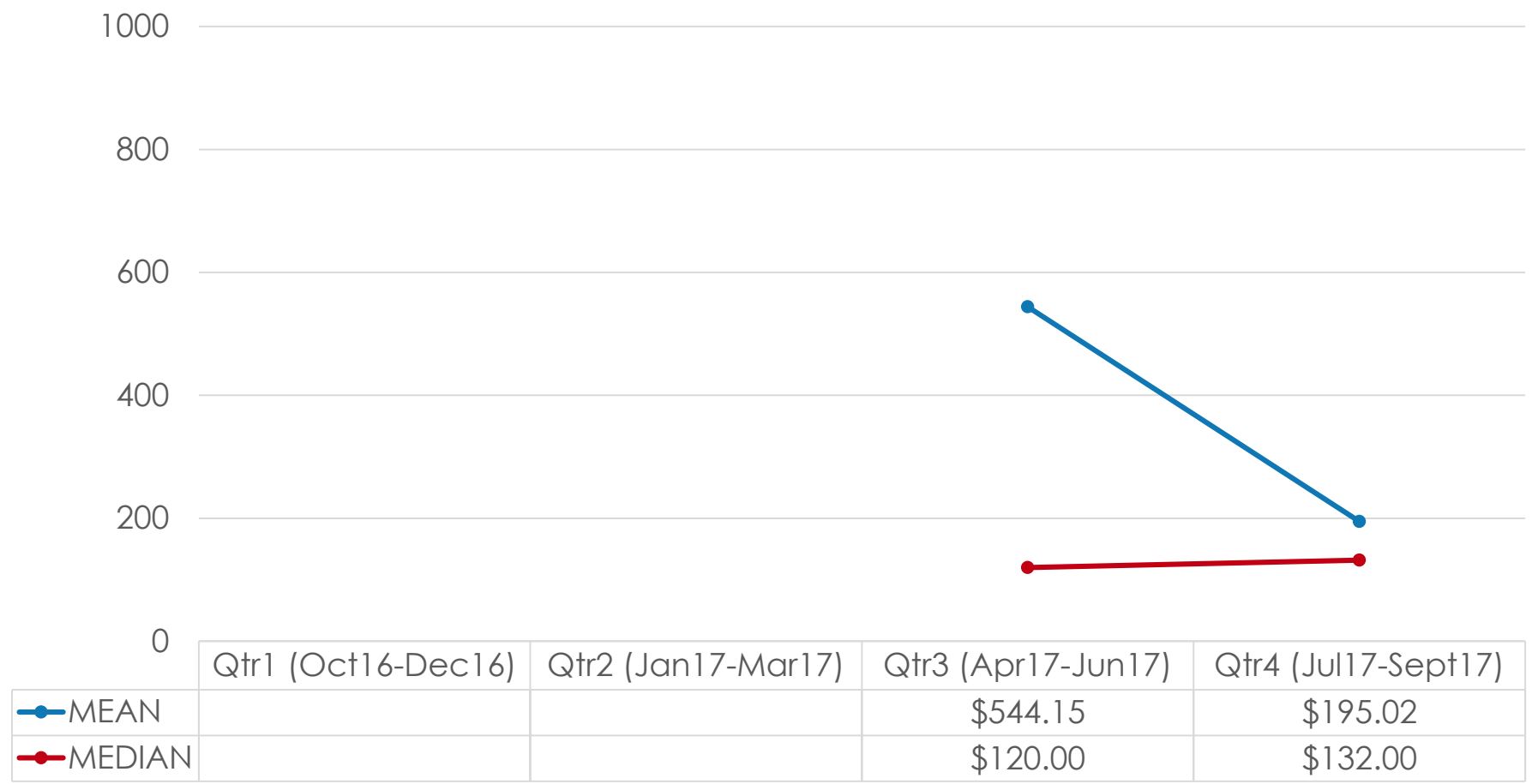


Prepaid– FY2017 Tracking Accommodations w/ Meal Only



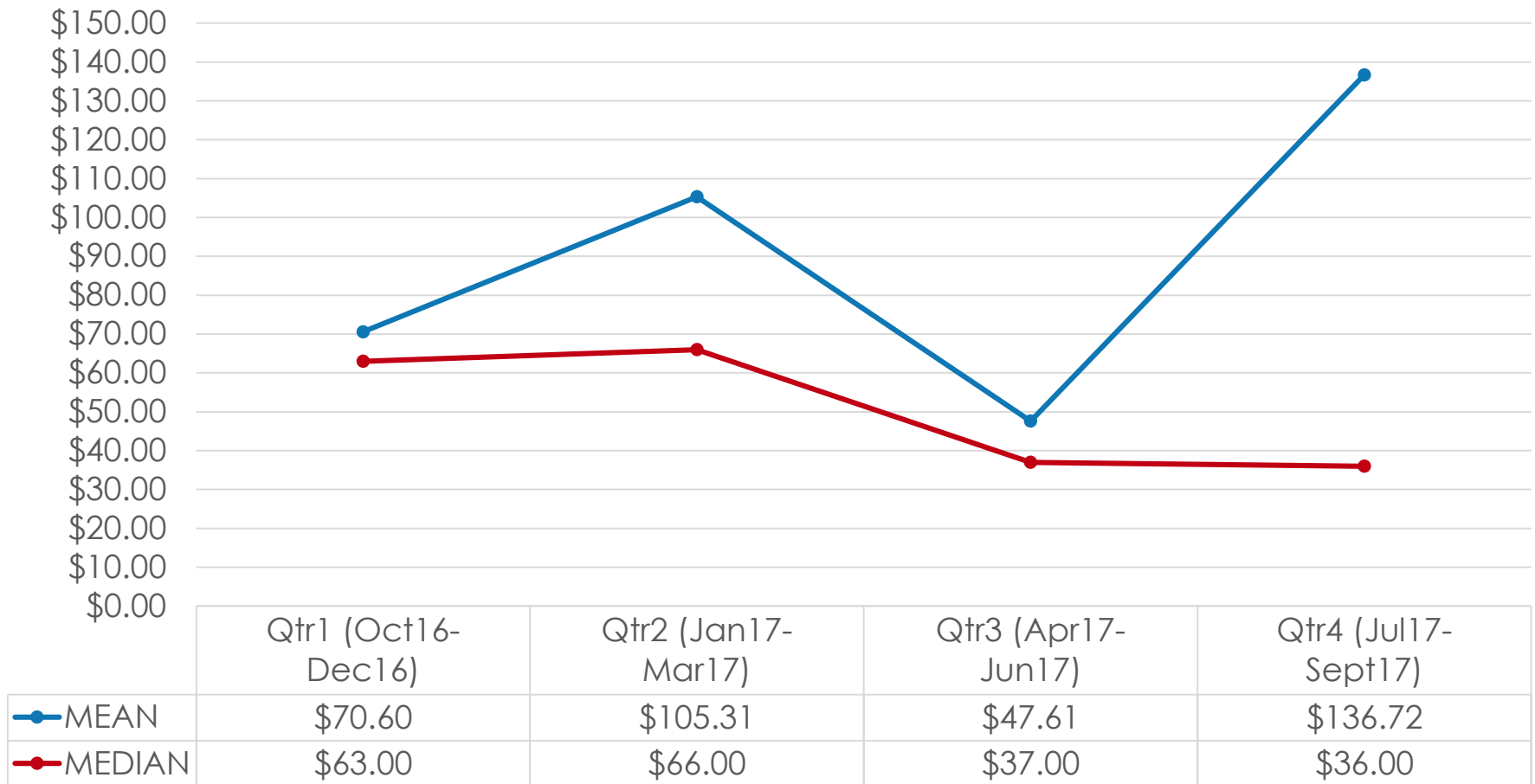
Prepaid– FY2017 Tracking

Food & Beverage in Hotel



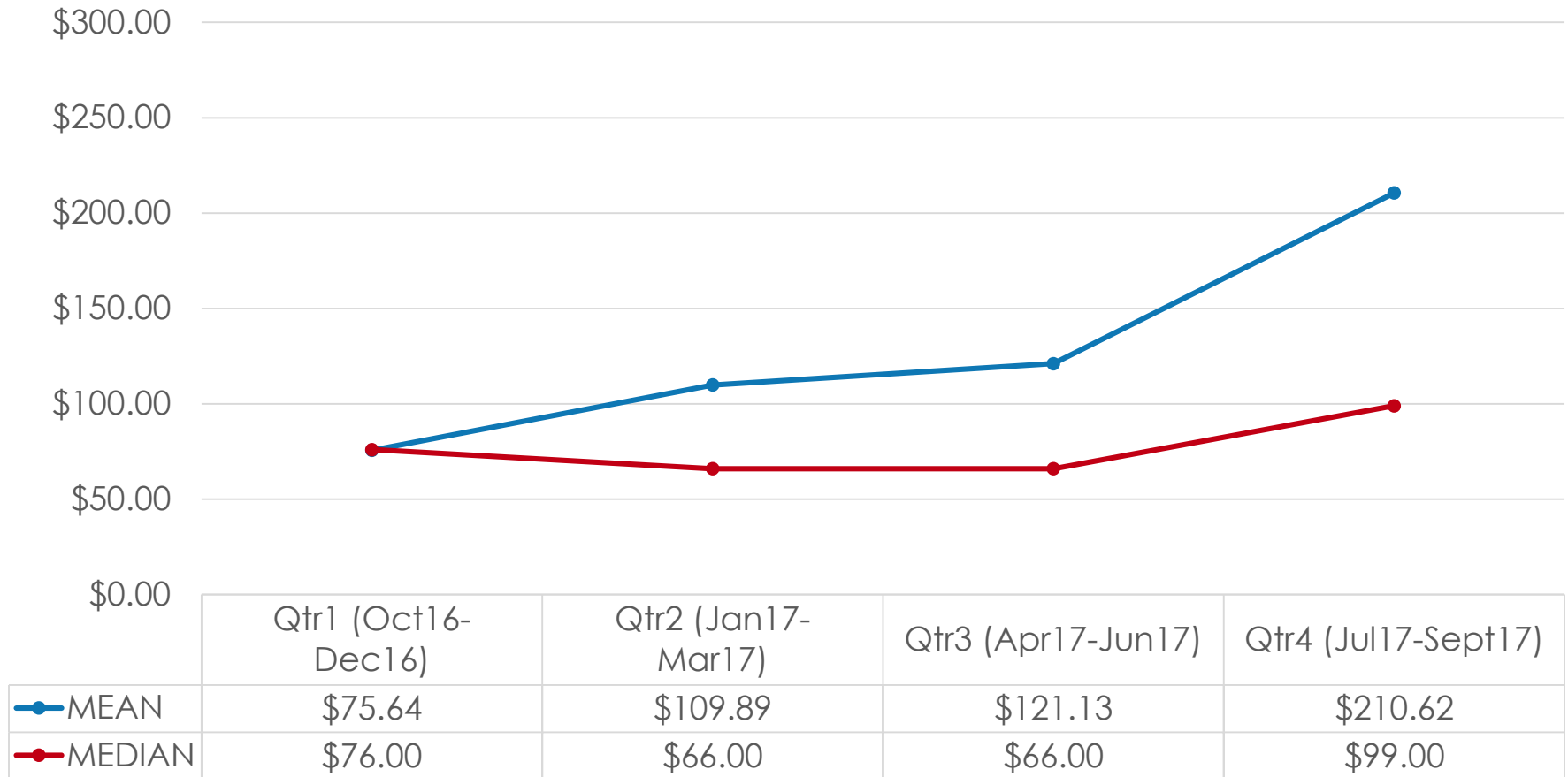
Prepaid– FY2017 Tracking

Ground Transportation - Taiwan



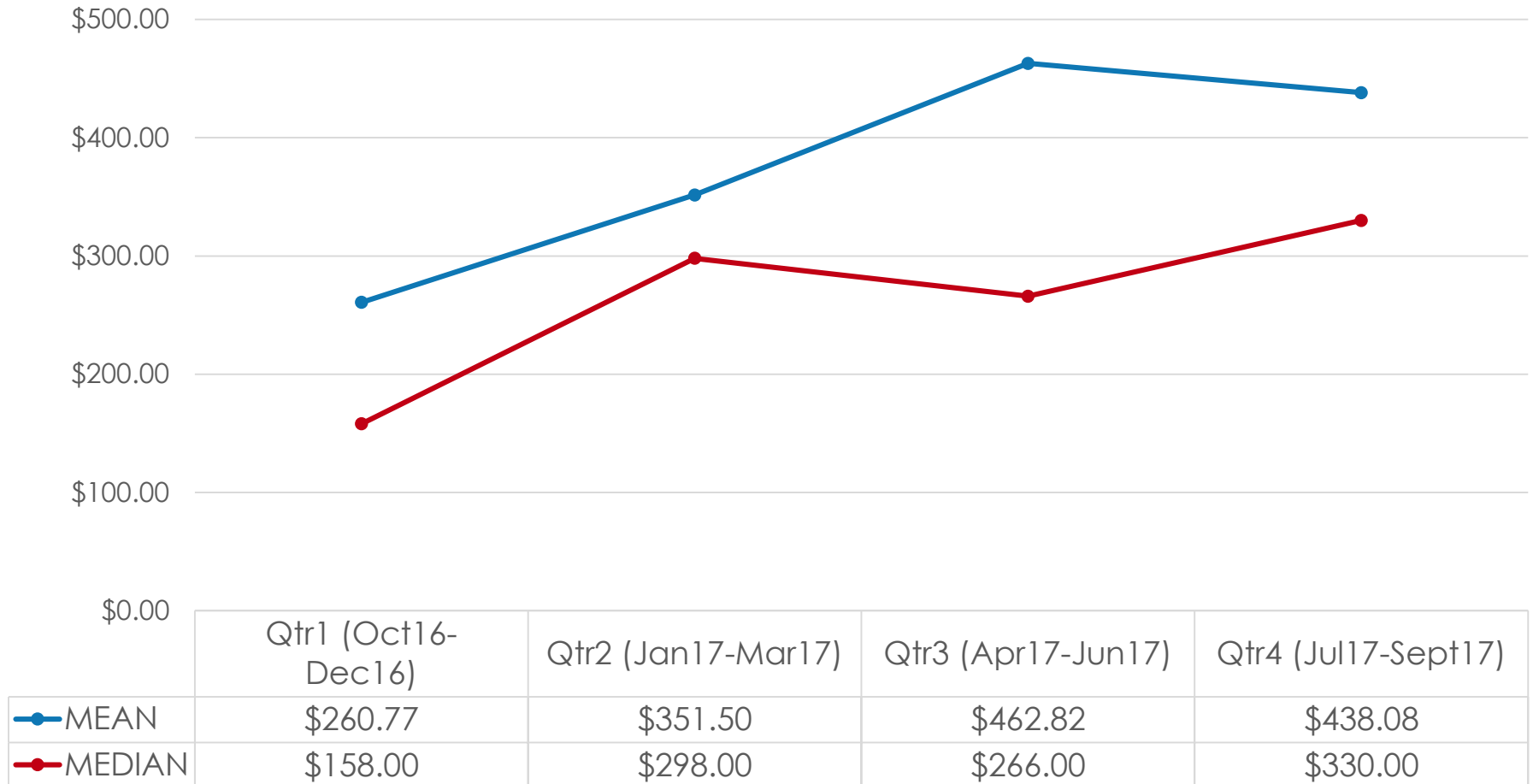
Prepaid– FY2017 Tracking

Ground Transportation - Guam



Prepaid– FY2017 Tracking

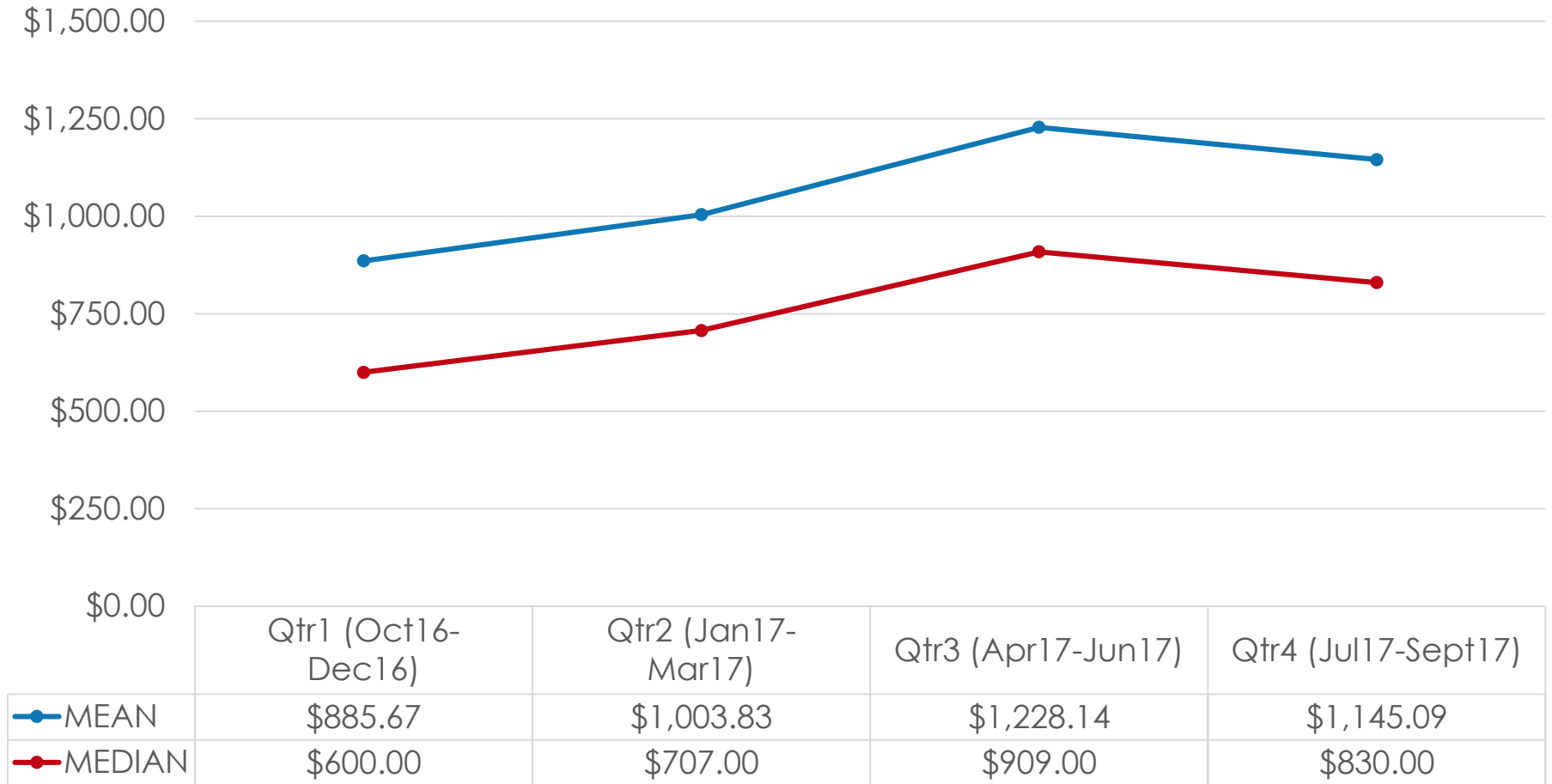
Optional tours/ Activities



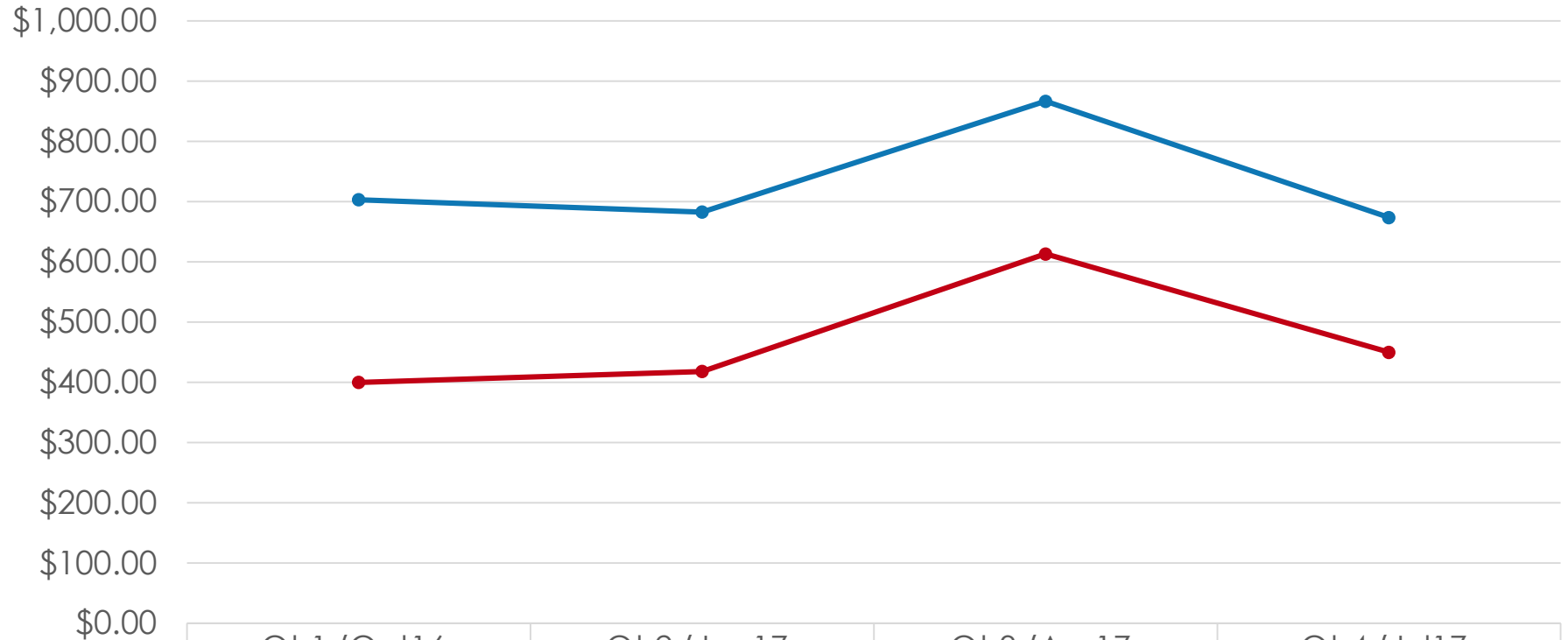
On-Island Expenditures

- \$1,145.09 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$673.62 = overall mean average per person prepaid expenditures

On-Island Entire Travel Party – FY2017 Tracking



On-Island Per Person – FY2017 Tracking



	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	\$702.97	\$682.53	\$866.42	\$673.62
MEDIAN	\$400.00	\$418.00	\$613.00	\$450.00

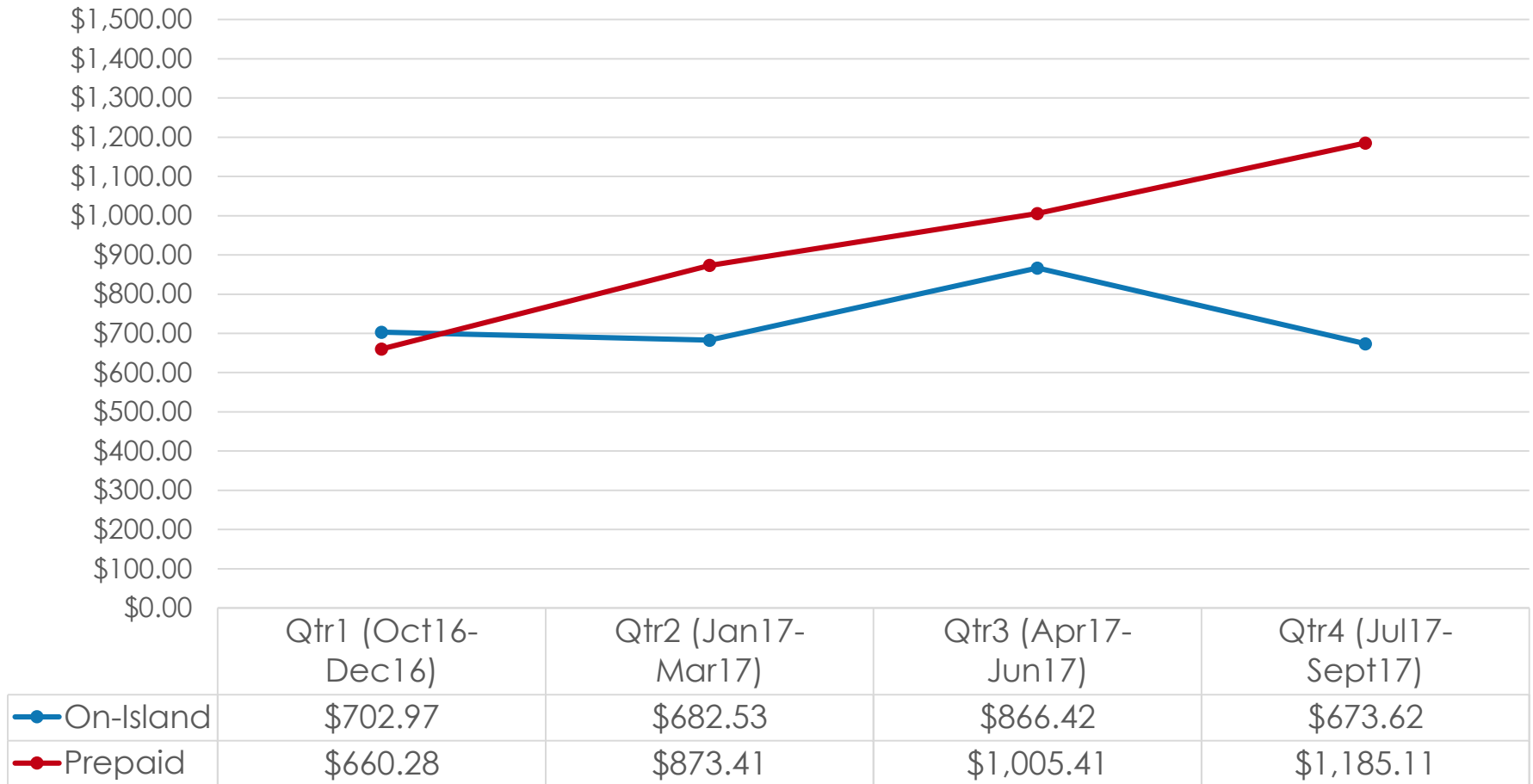
On-Island Per Person – Key Segments

GVB EXIT SURVEY
Q11A ONISLE EXPENDITURE- PER PERSO

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOON
		-	-	-	-	-
ONISLE PP	Mean	\$673.62	\$920.67	\$707.32	\$437.50	\$444.95
	Median	\$450	\$662	\$498	\$438	\$200

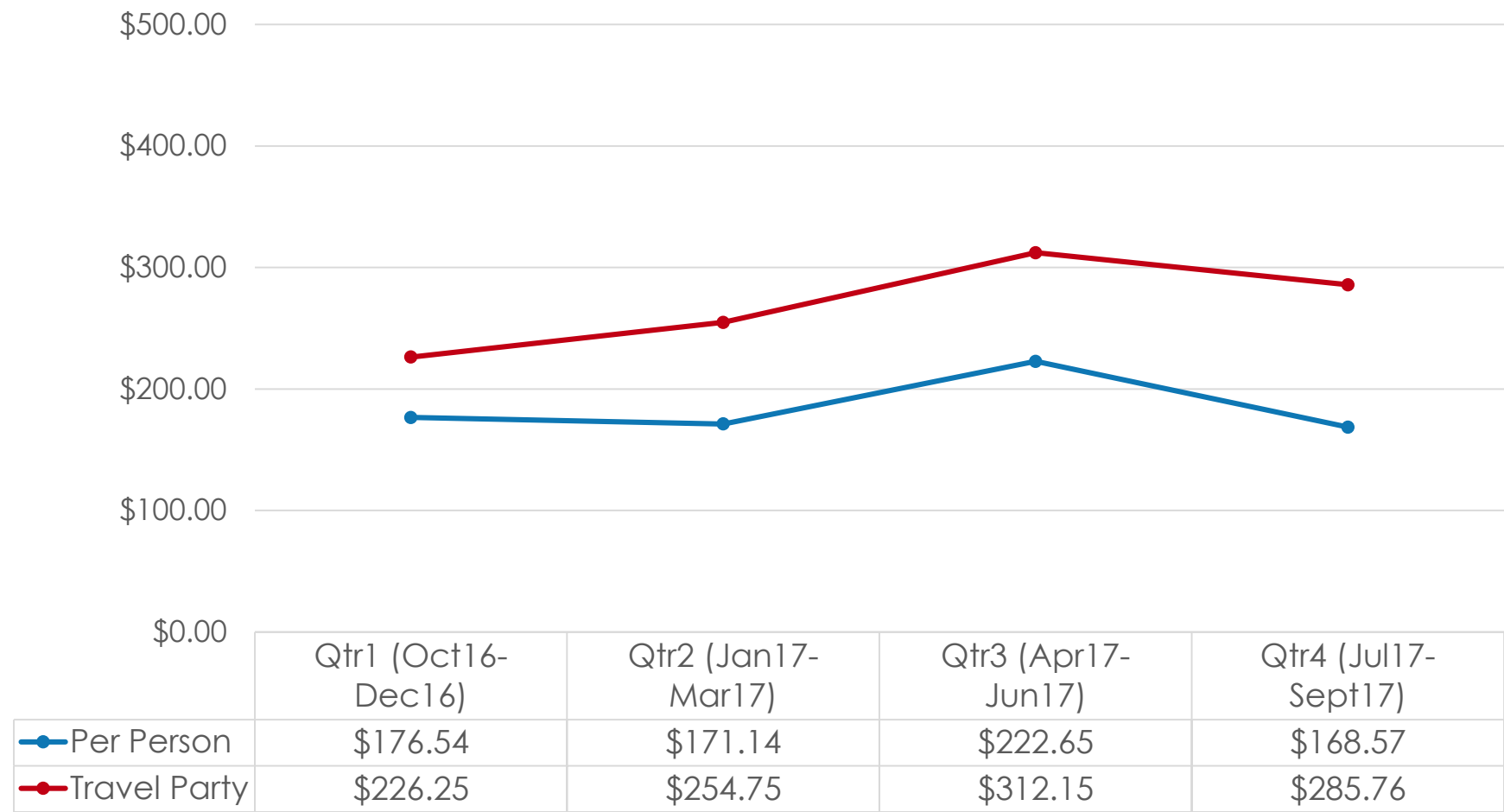
Prepared by Anthology Research

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



On-Island Per Day Spending – FY2017 Tracking

MEAN

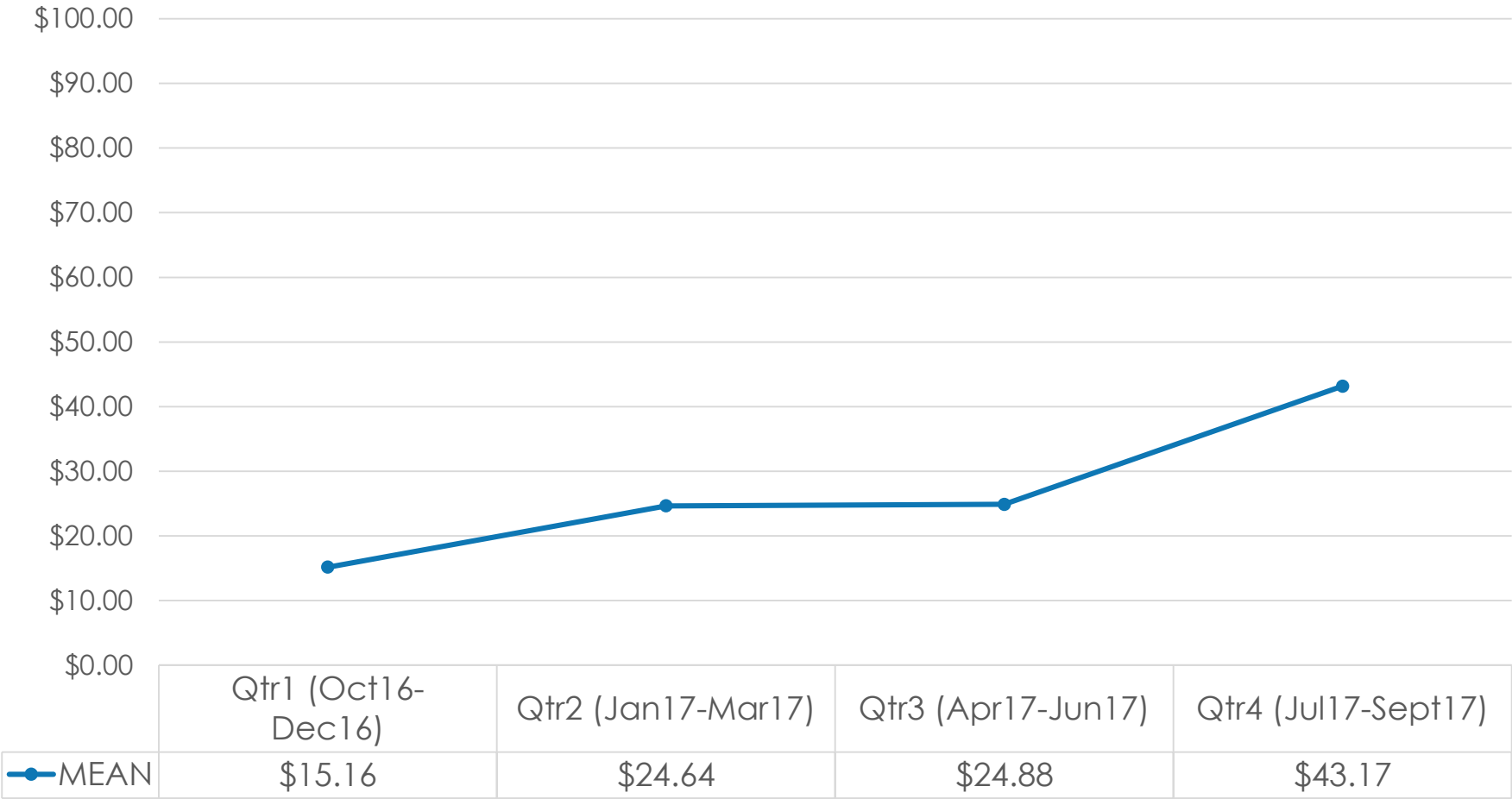


On-Island Expenses by Category – MEAN Entire Travel Party



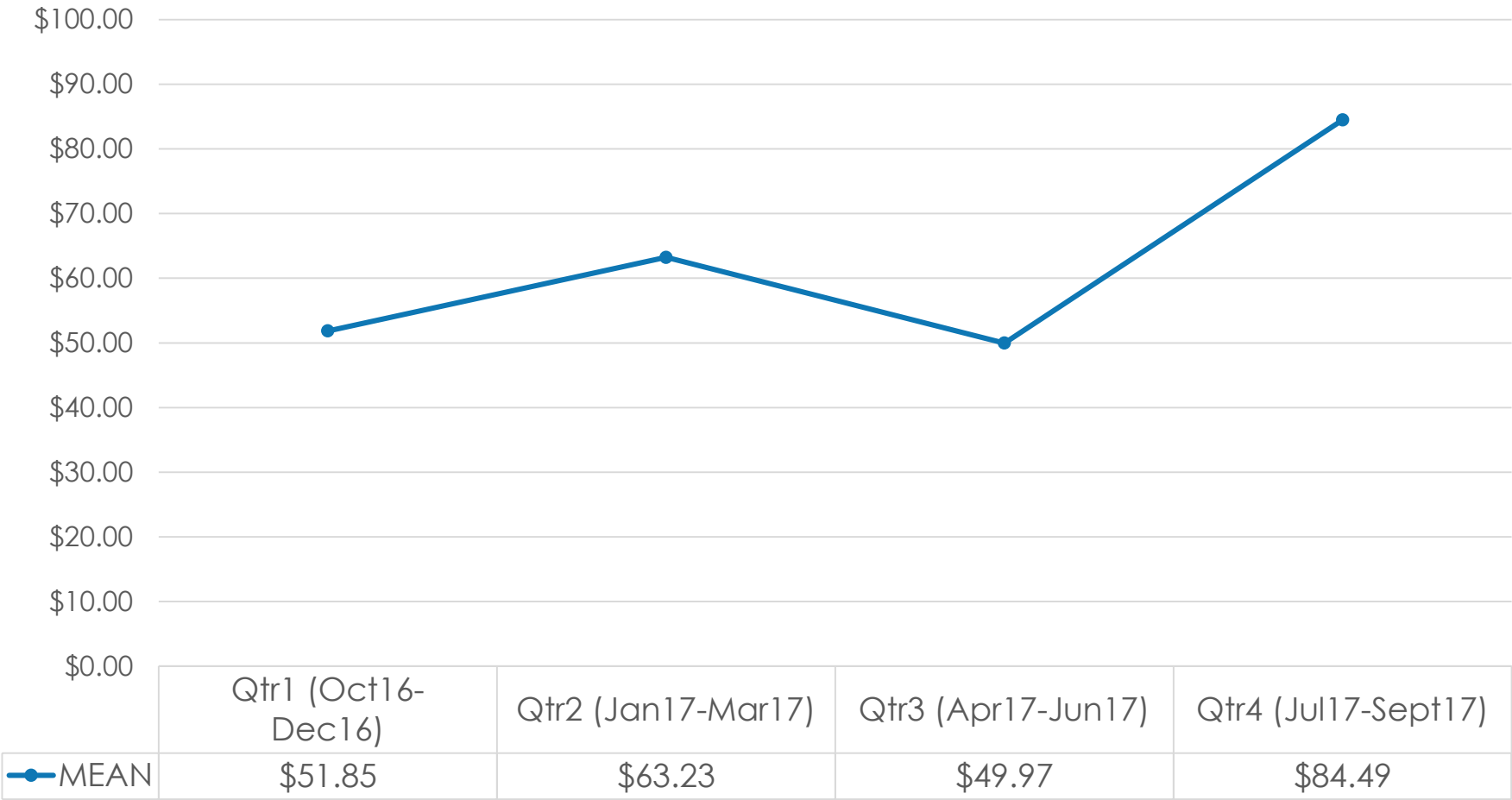
On-Island – FY2017 Tracking

Food & Beverage - Hotel



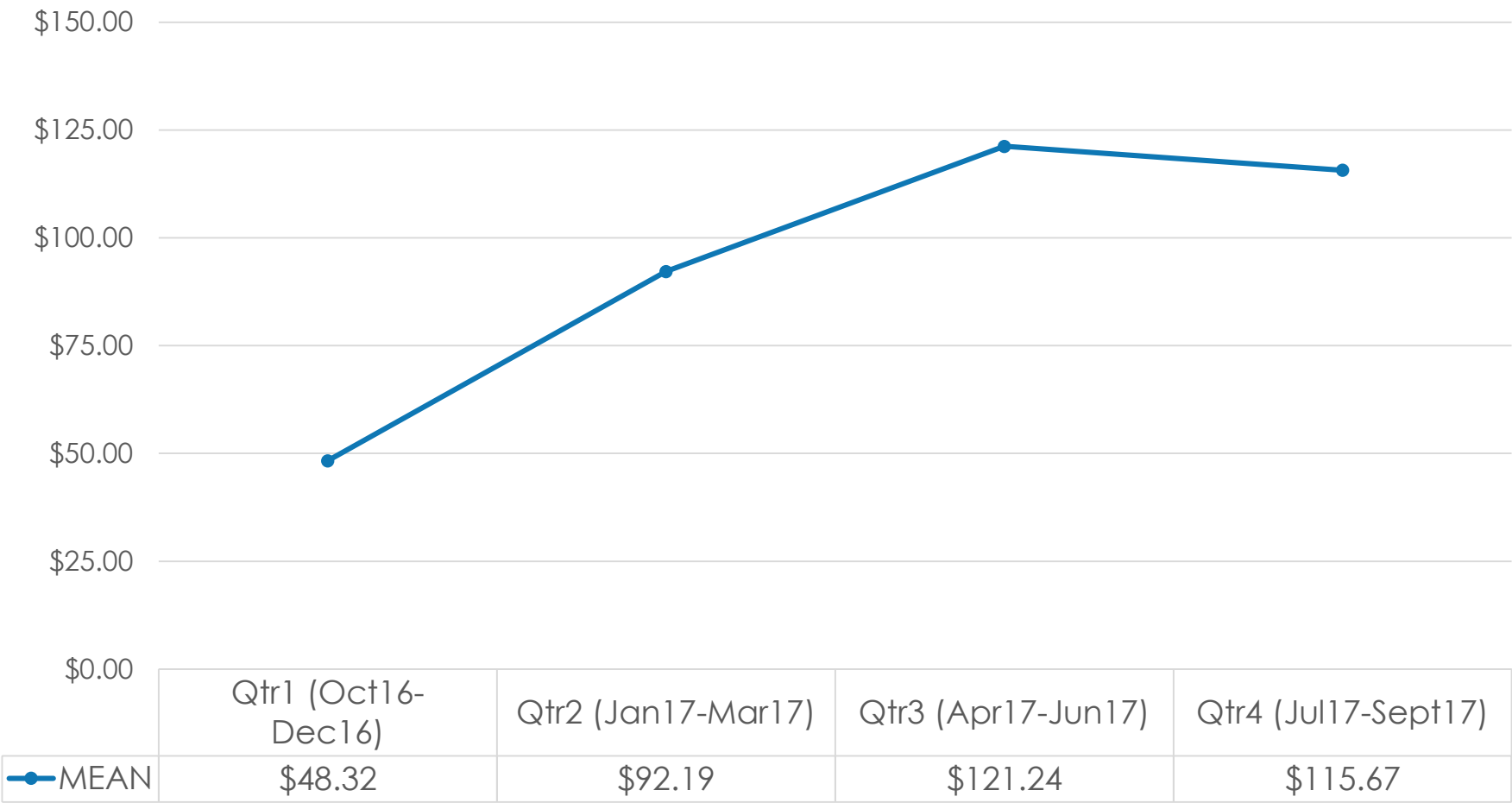
On-Island – FY2017 Tracking

Food & Beverage – Fast Food/ Convenience Store



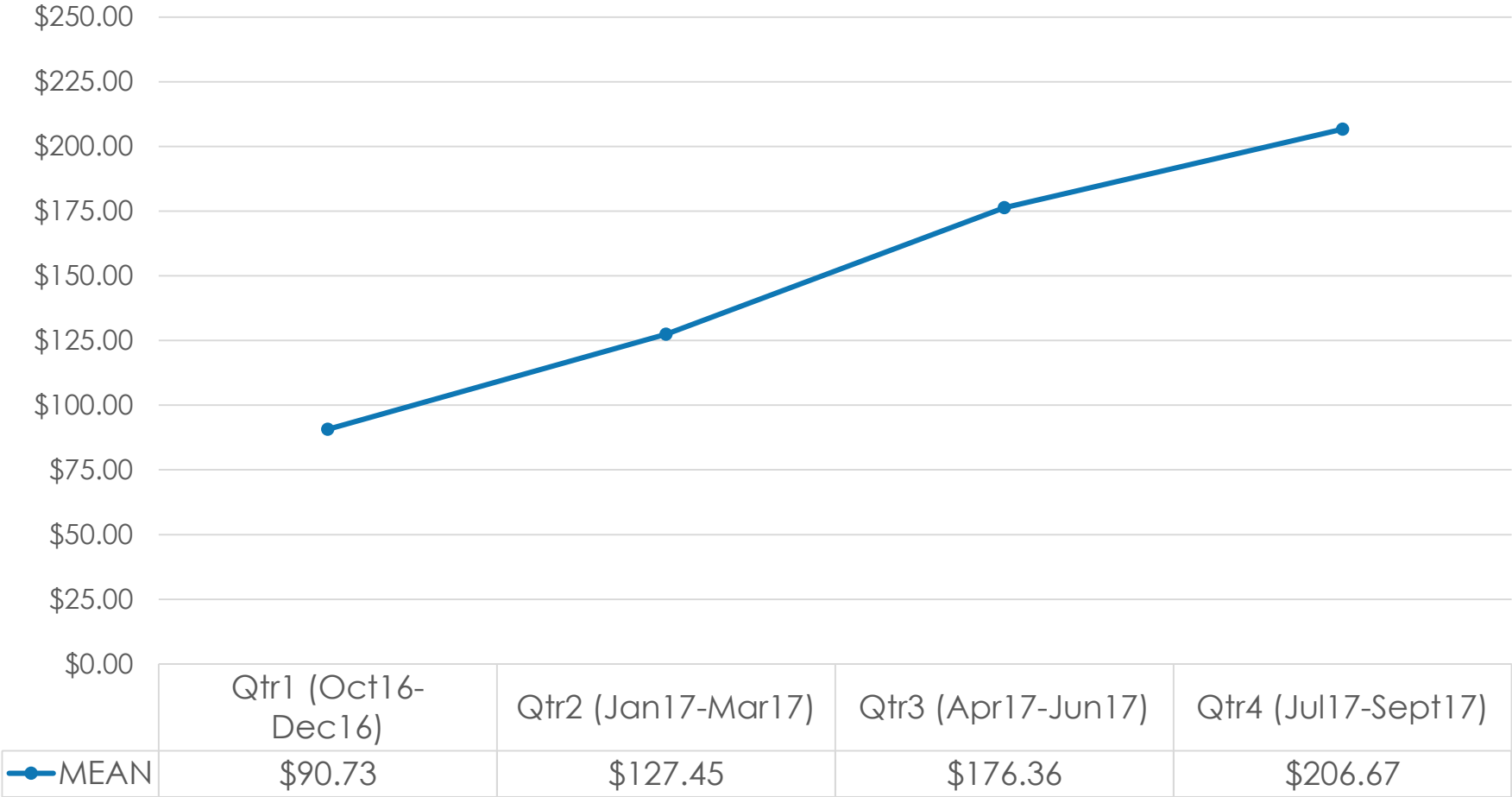
On-Island – FY2017 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



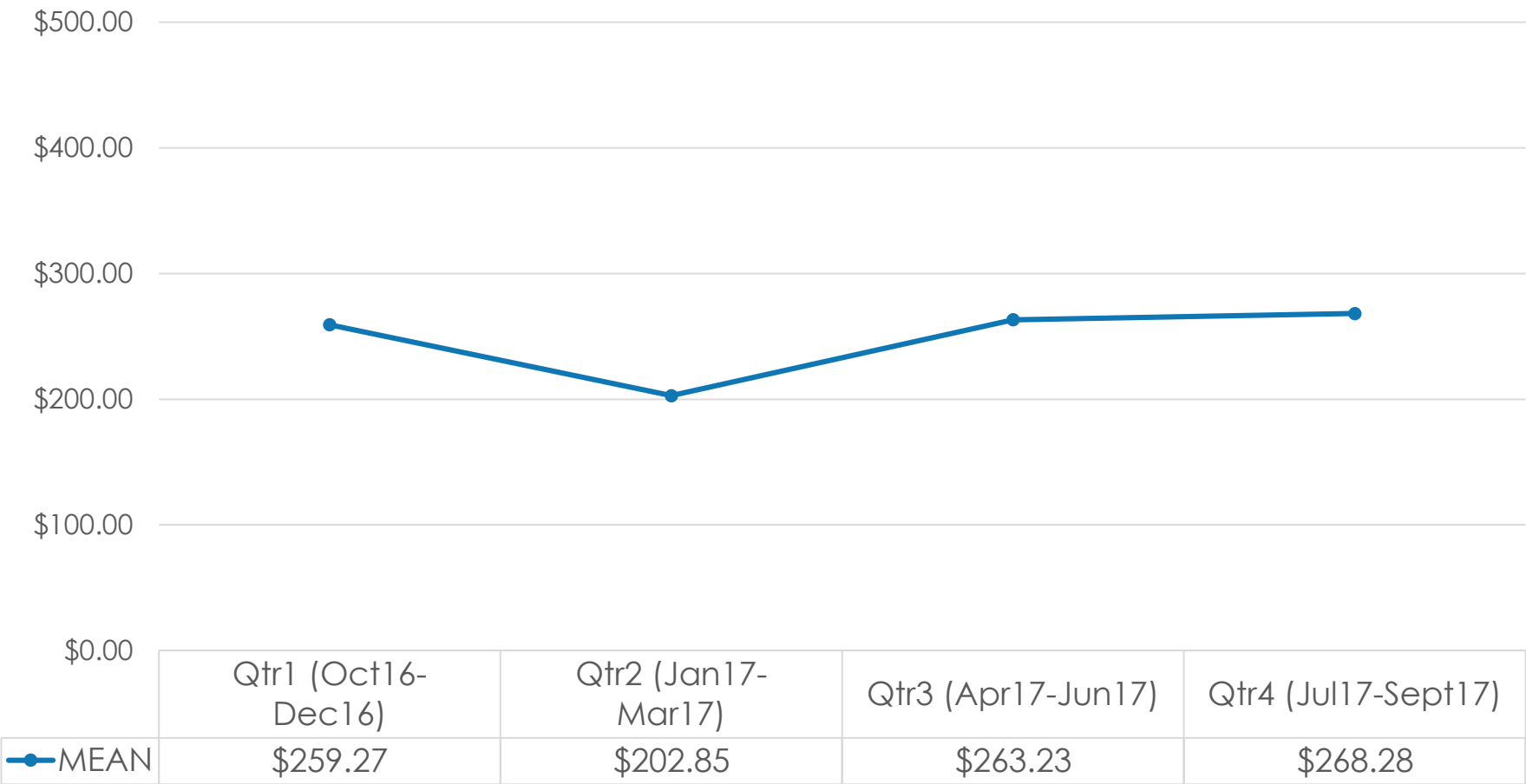
On-Island – FY2017 Tracking

Optional tour/ Activities



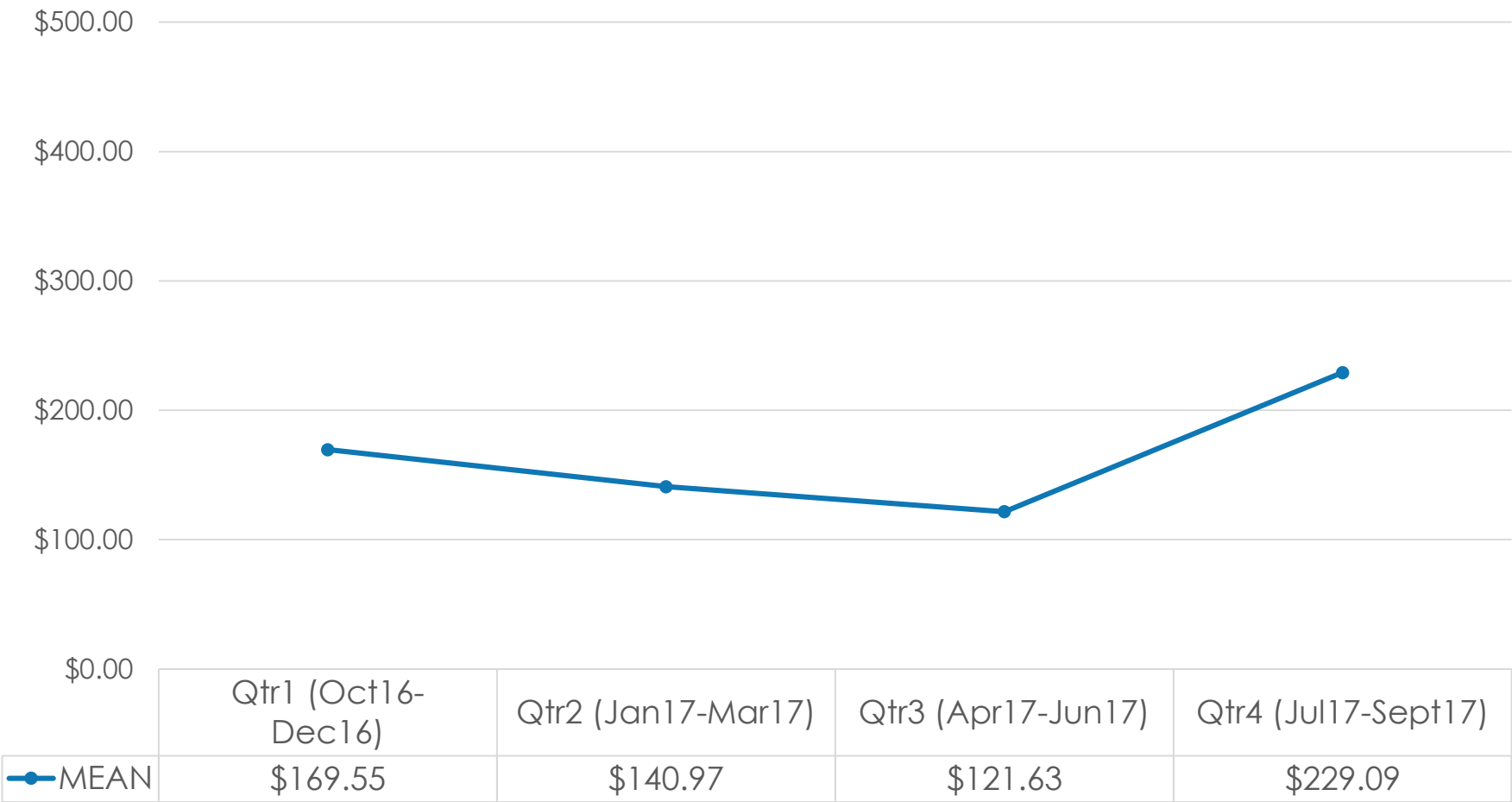
On-Island – FY2017 Tracking

Gift/ Souvenir – Self/ Companion



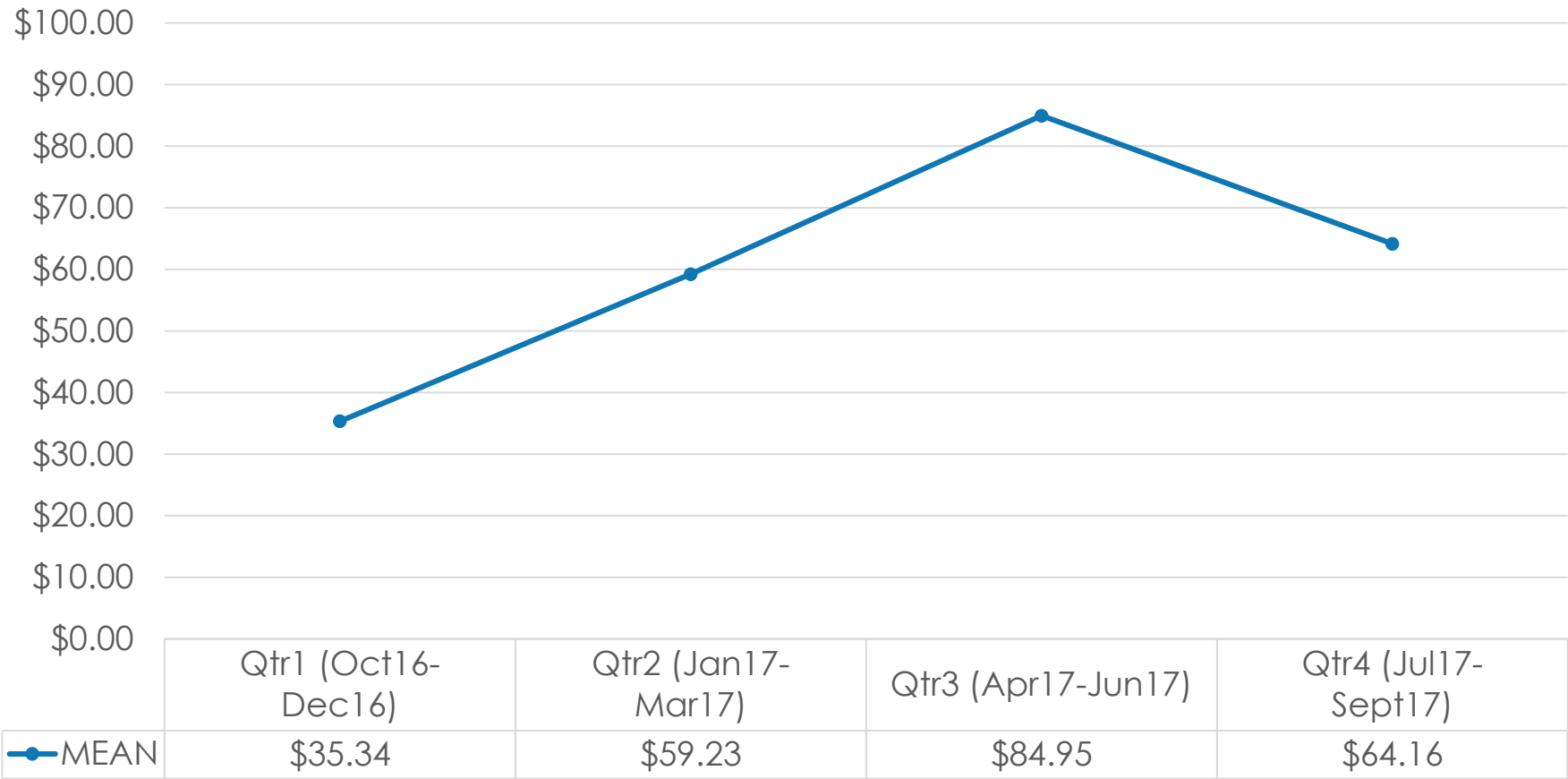
On-Island – FY2017 Tracking

Gift/ Souvenir – Friends/ Family



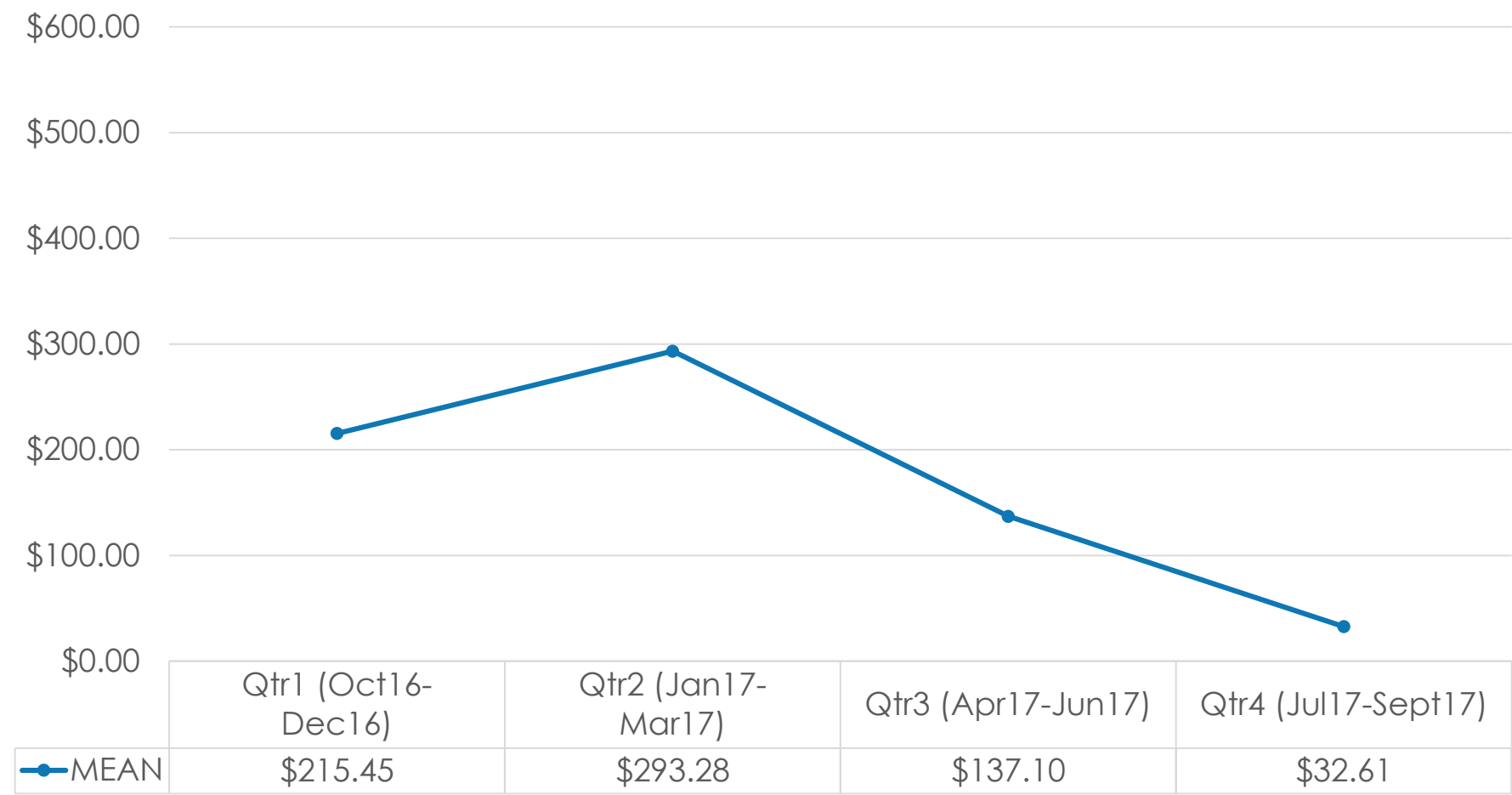
On-Island – FY2017 Tracking

Local Transportation



On-Island – FY2017 Tracking

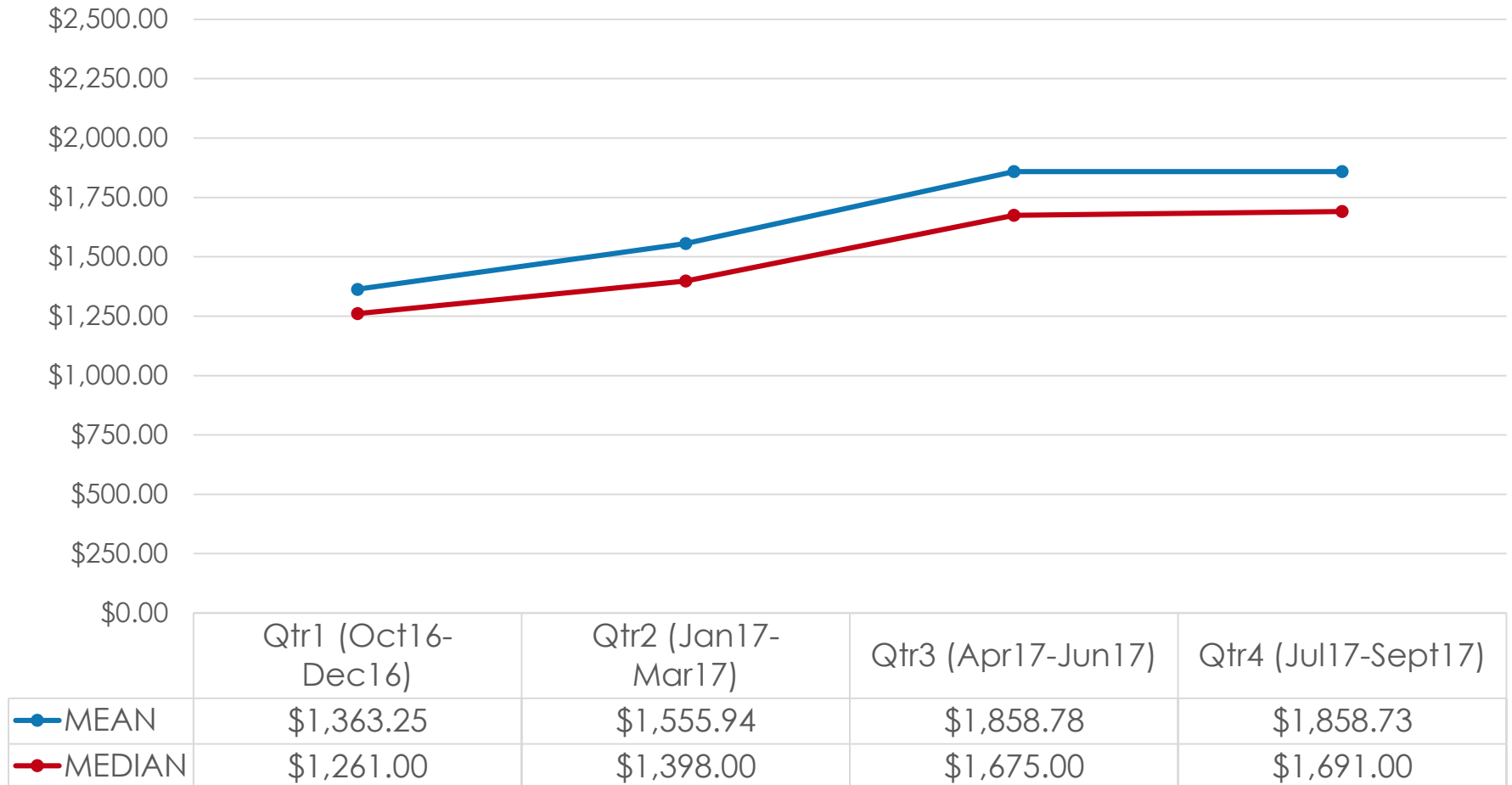
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,858.73 = overall mean average prepaid expense by respondent/ Per Person

TOTAL Per Person Expenditures – FY2017 Tracking



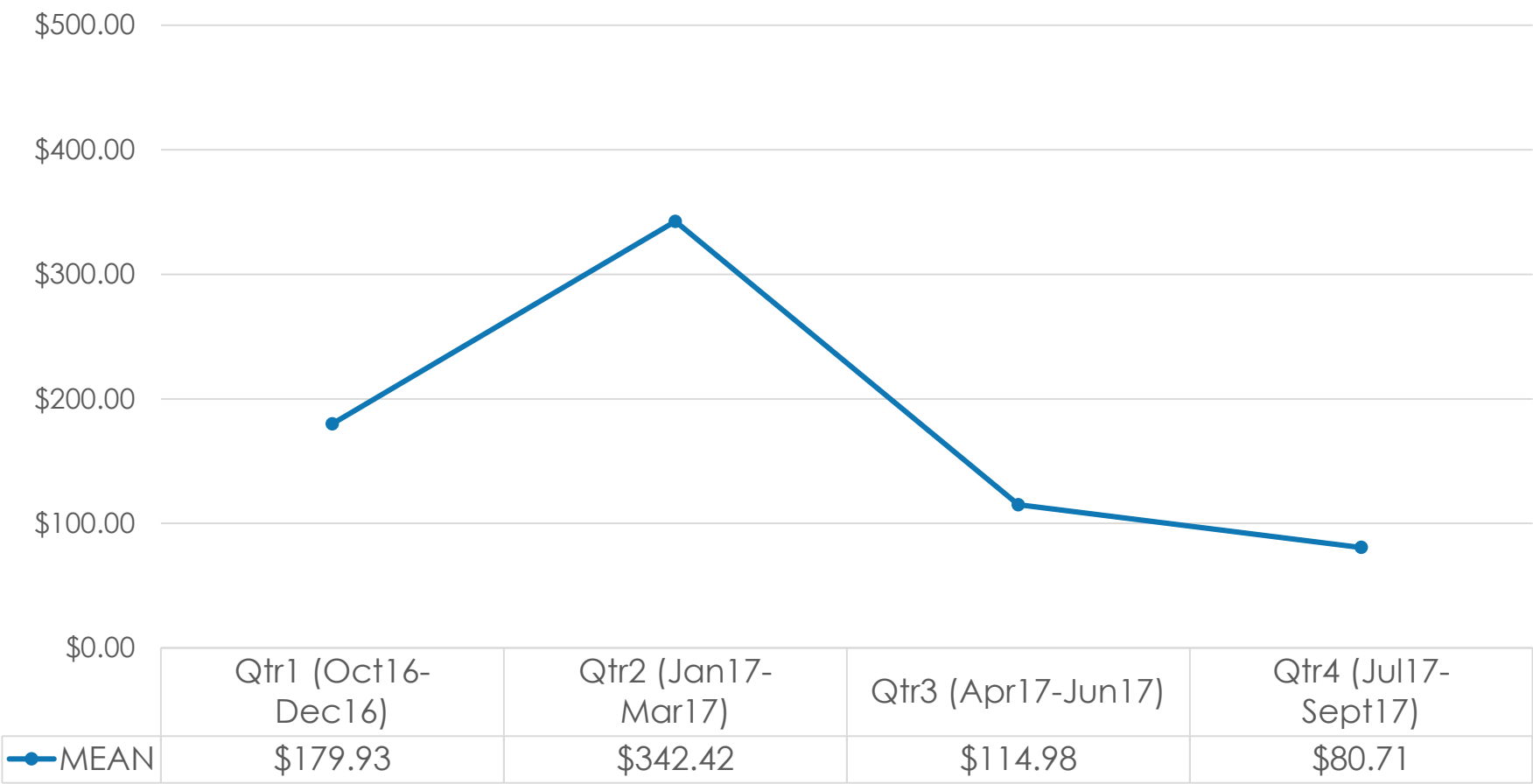
TOTAL Per Person Expenditures – Key Segments

**GVB EXIT SURVEY
TOTAL PER PERSON SPENDING:**

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOON
		-	-	-	-	-
TOTAL PP	Mean	\$1,858.73	\$1,306.21	\$1,910.96	\$850.59	\$1,356.89
	Median	\$1,691	\$1,819	\$1,753	\$851	\$1,116

Prepared by Anthology Research

GUAM AIRPORT EXPENDITURE – FY2017 Tracking

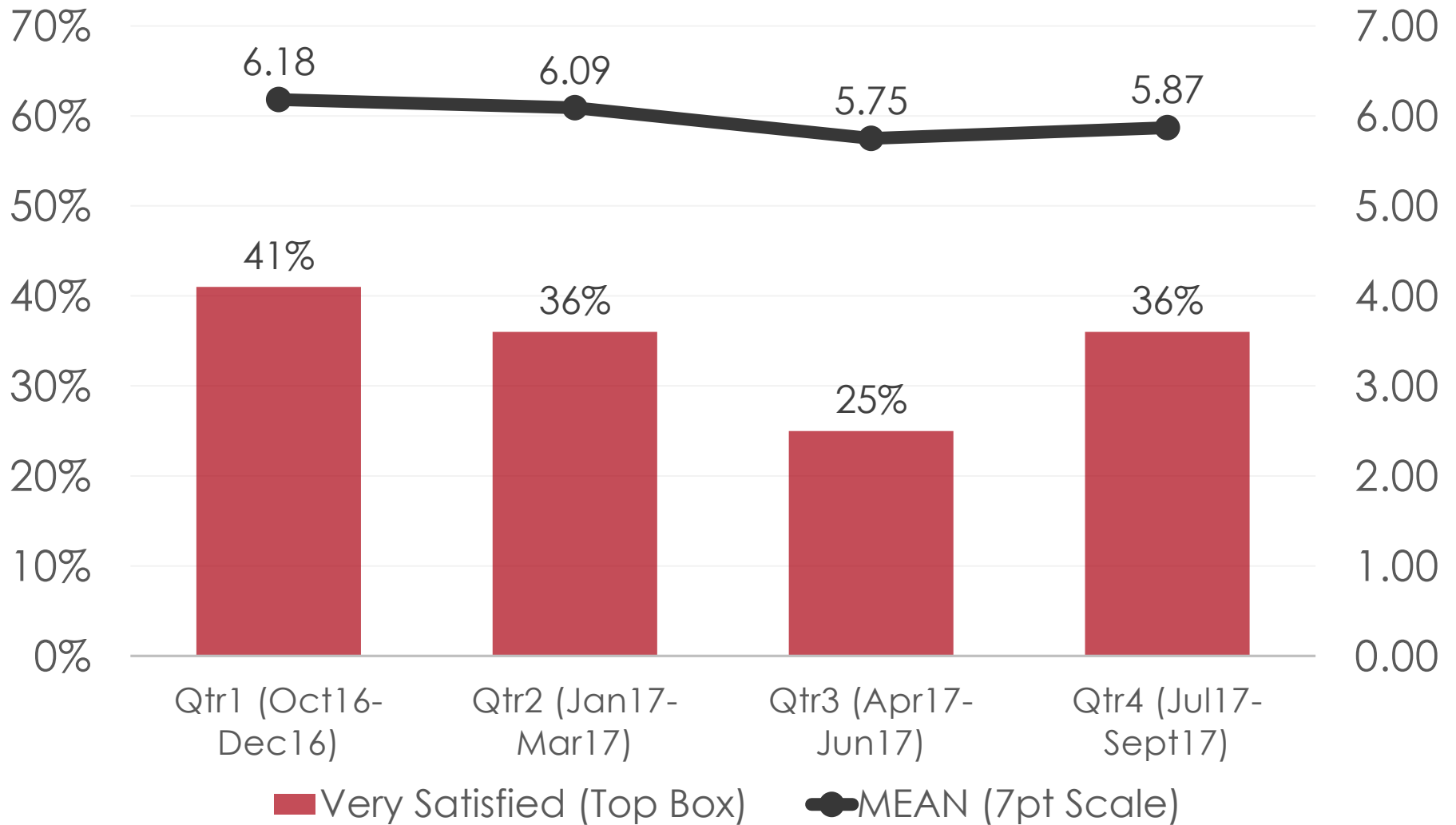


SECTION 4

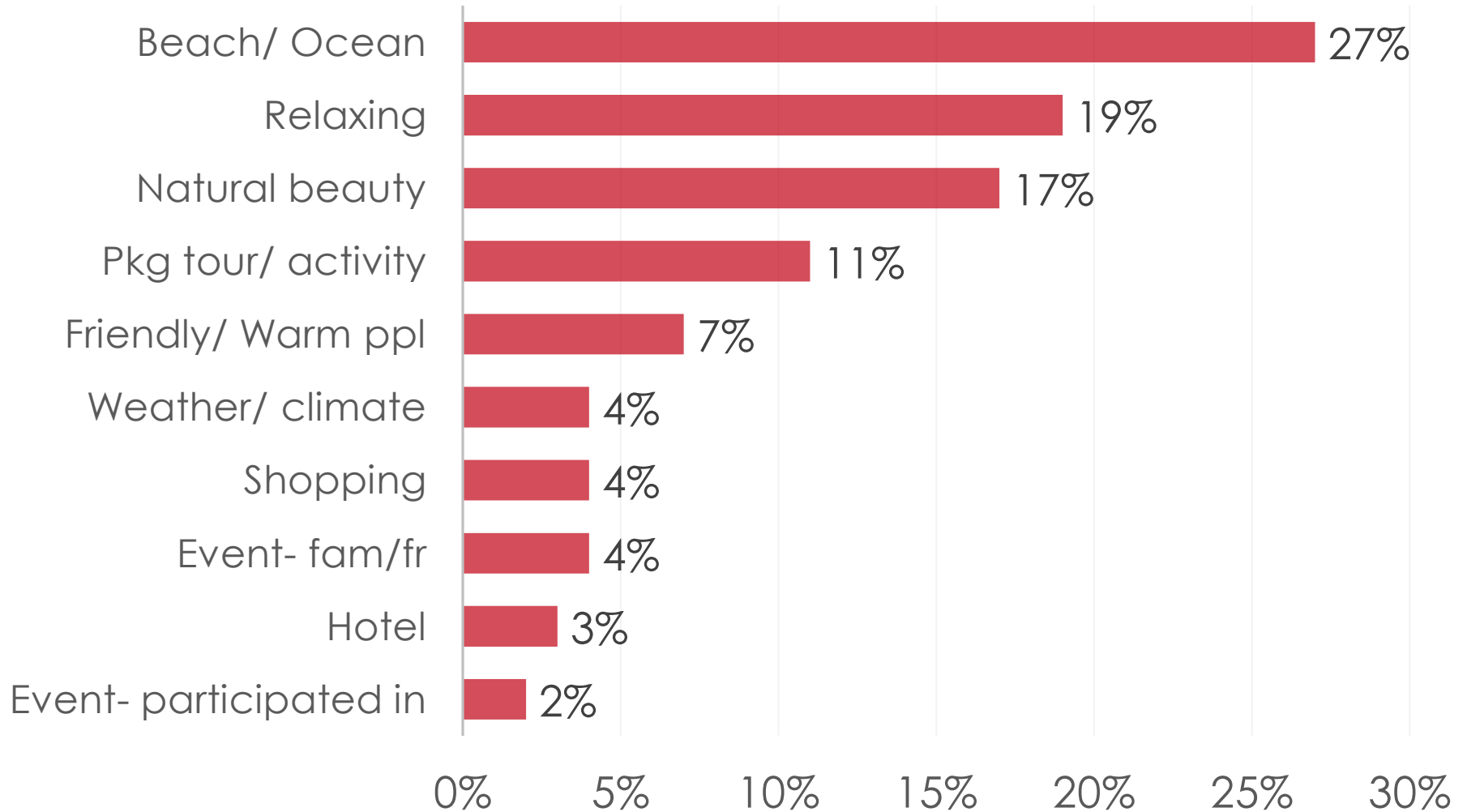
VISITOR SATISFACTION

BEHAVIOR

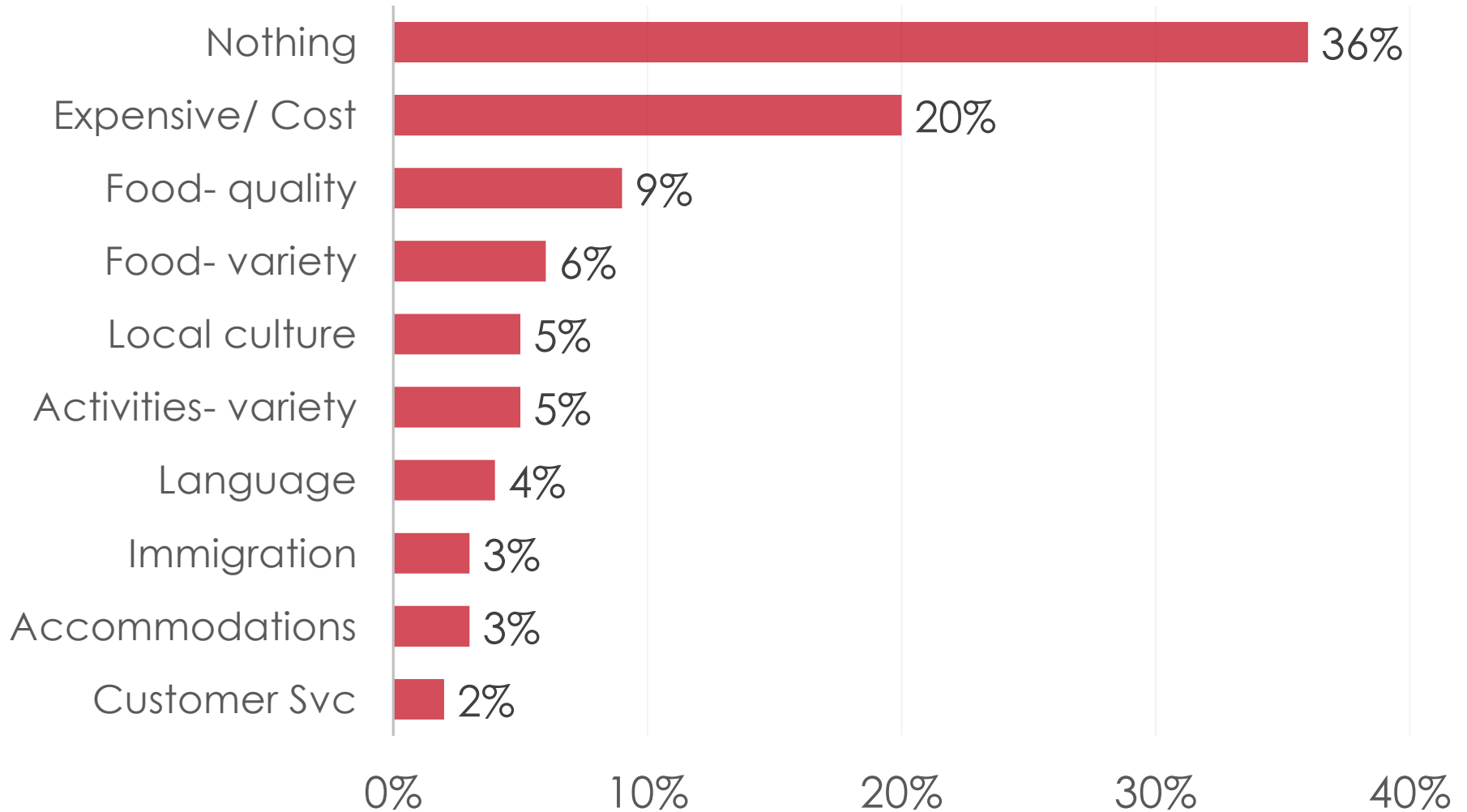
OVERALL SATISFACTION



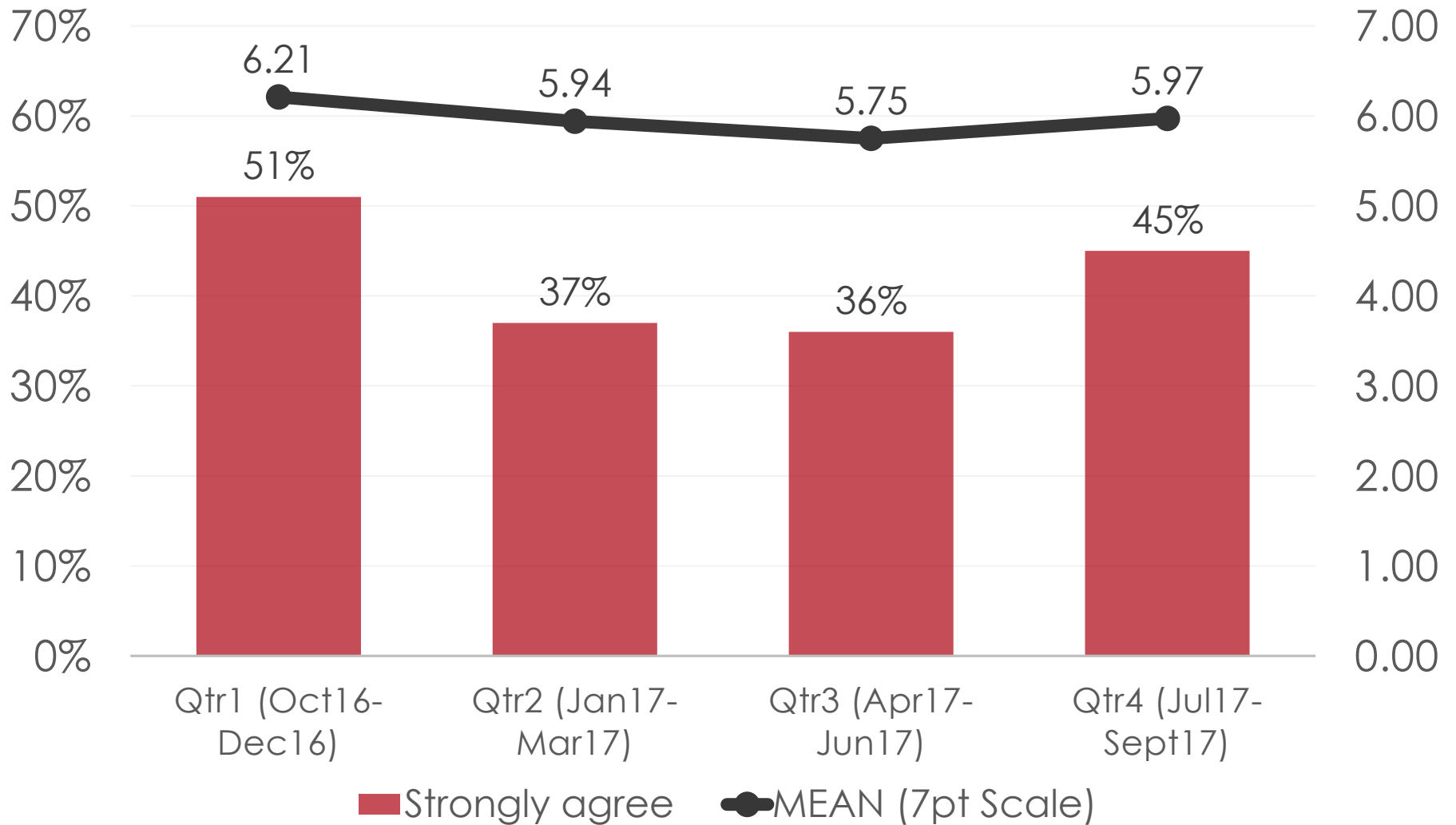
Positive Aspect of Trip



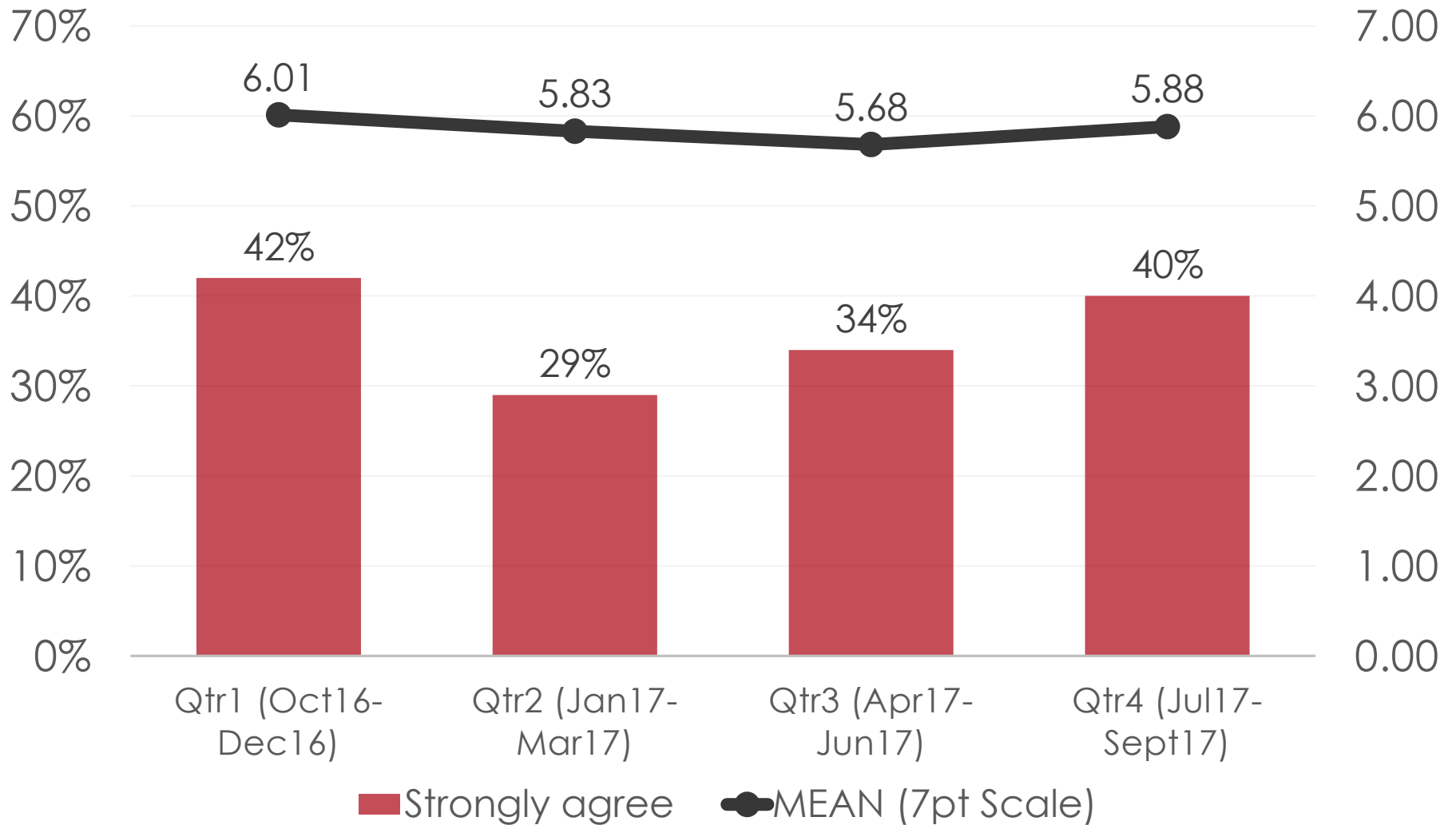
Negative Aspect of Trip



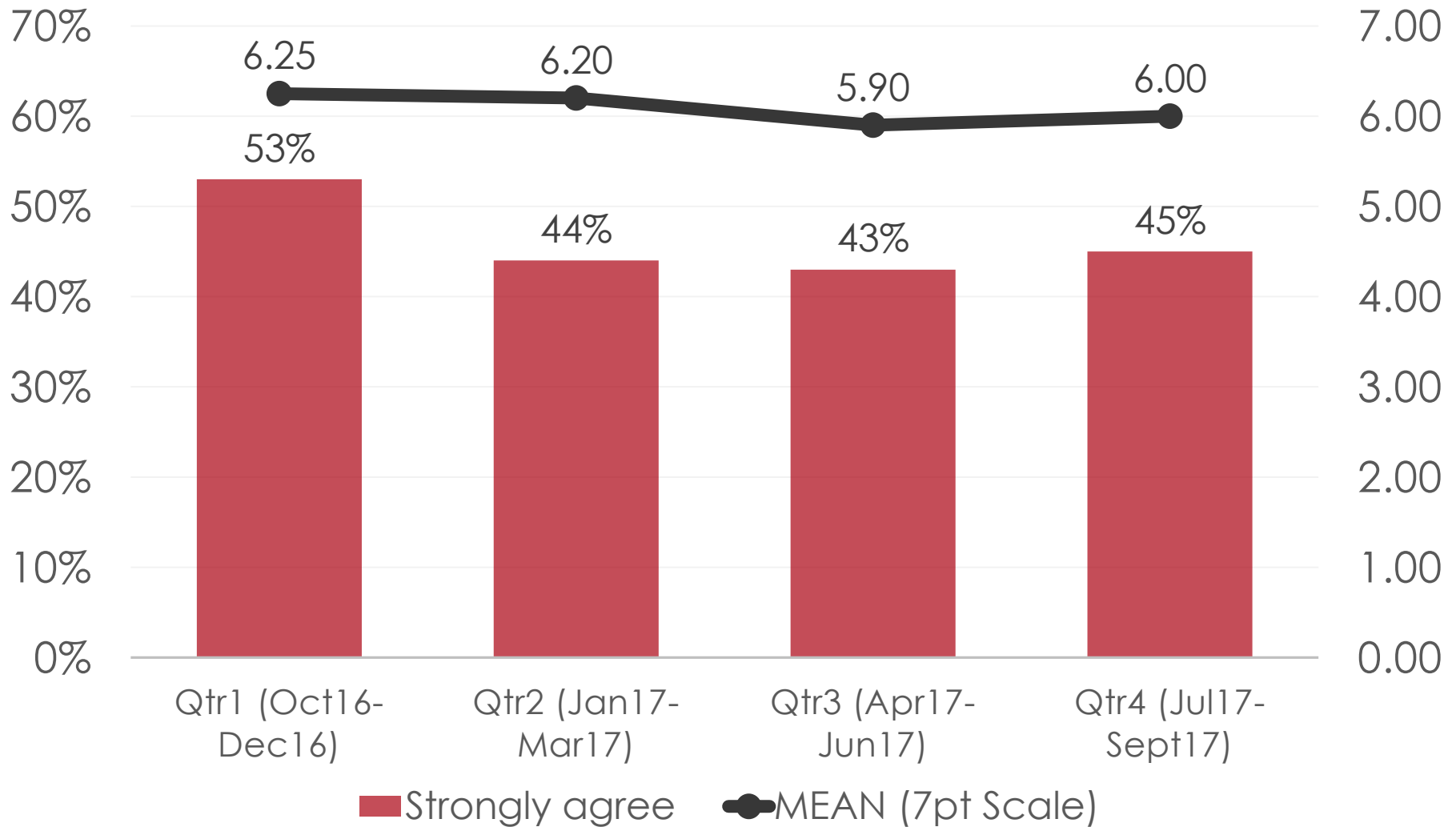
Guam was better than expected



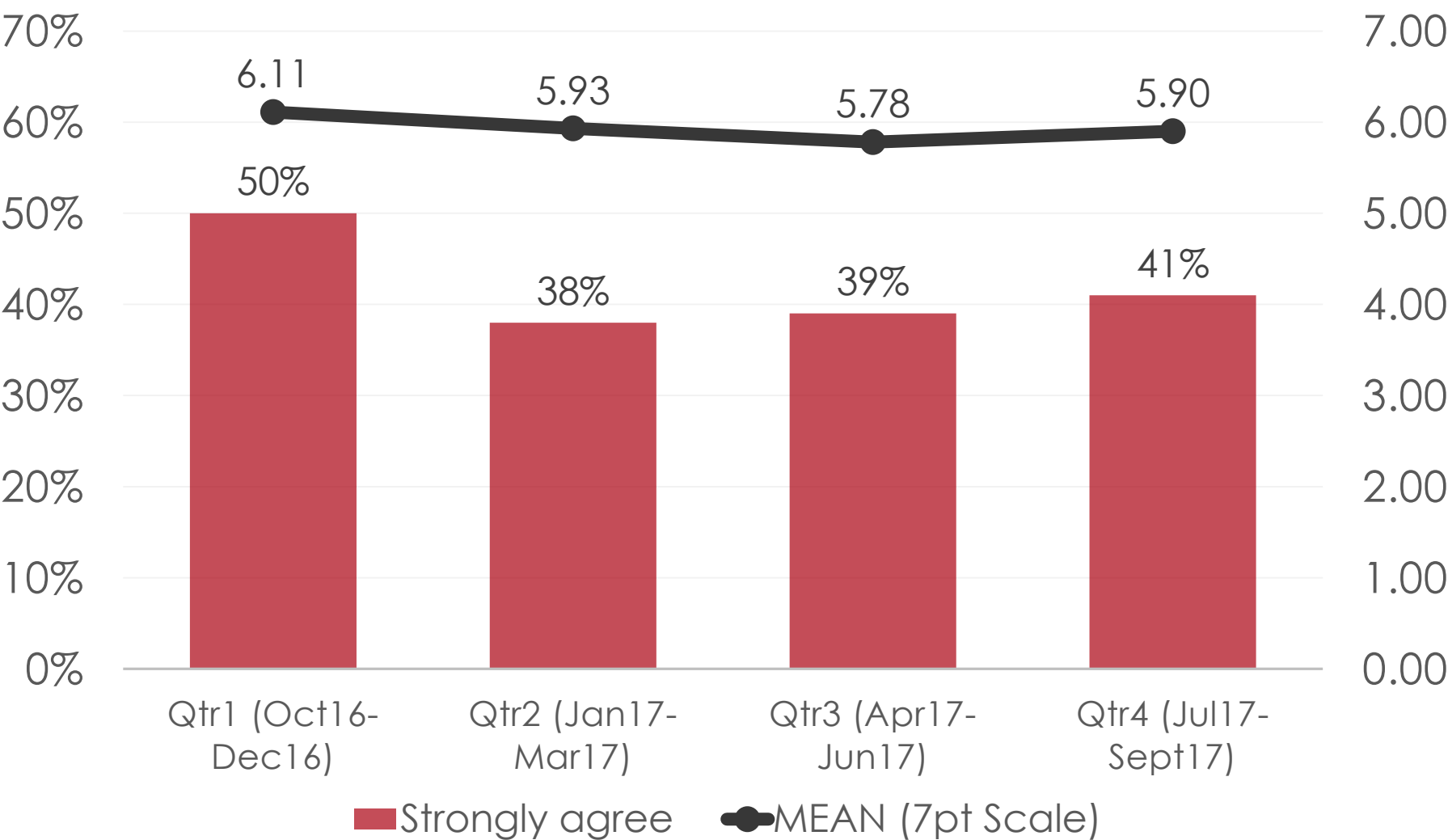
I had no communication problems



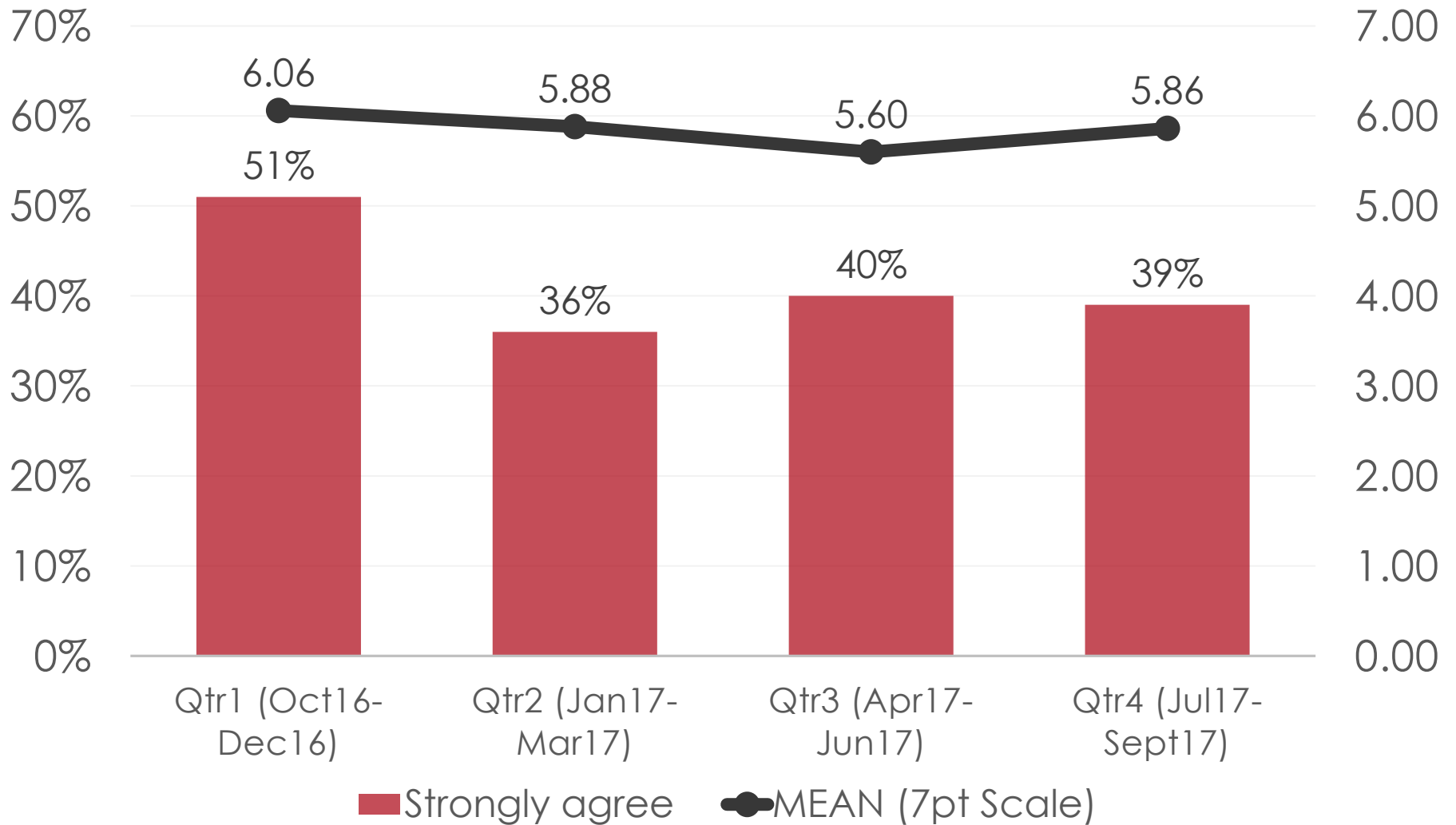
I will recommend Guam to friends



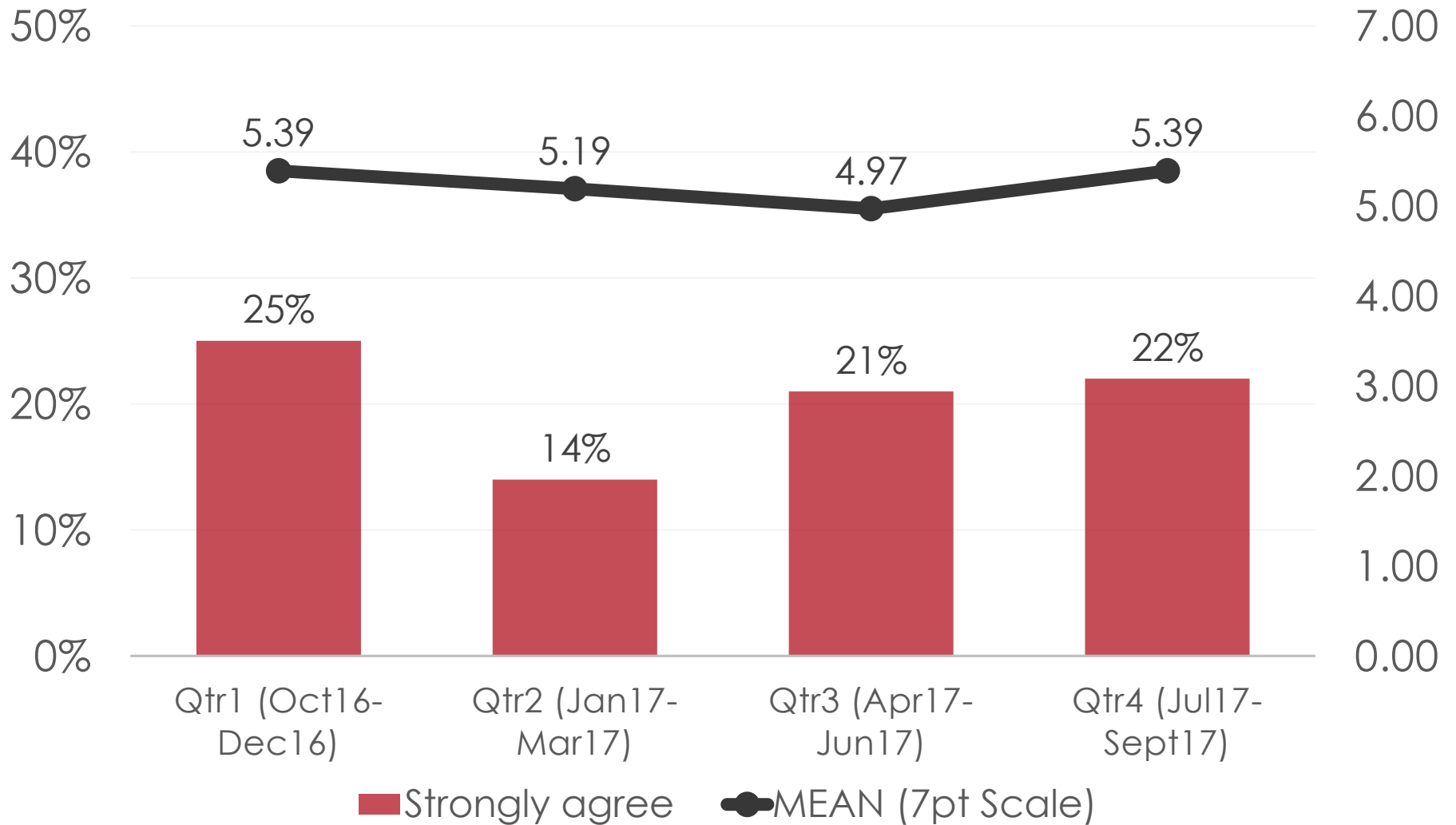
Sites on Guam were attractive



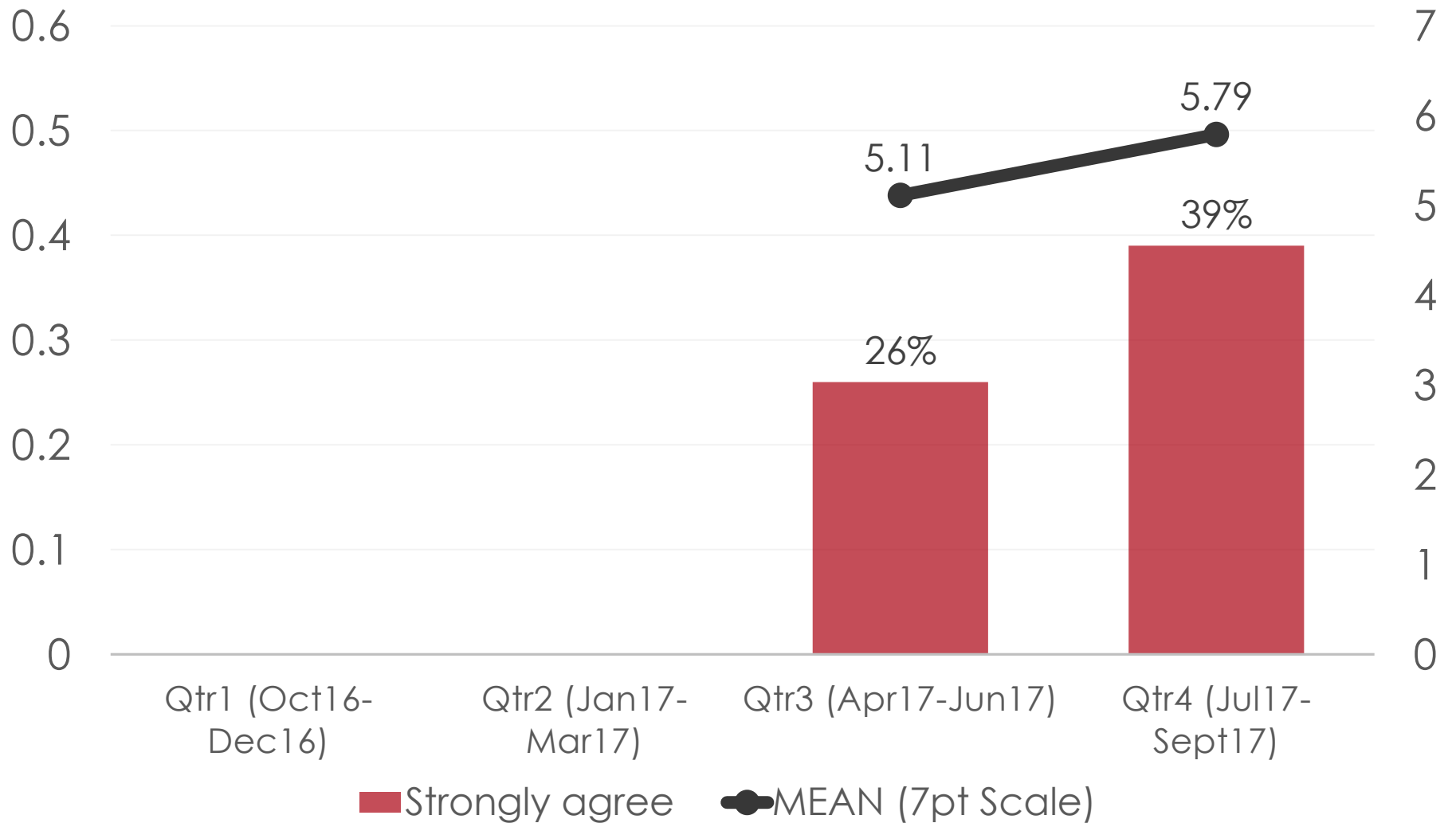
I plan to visit Guam again



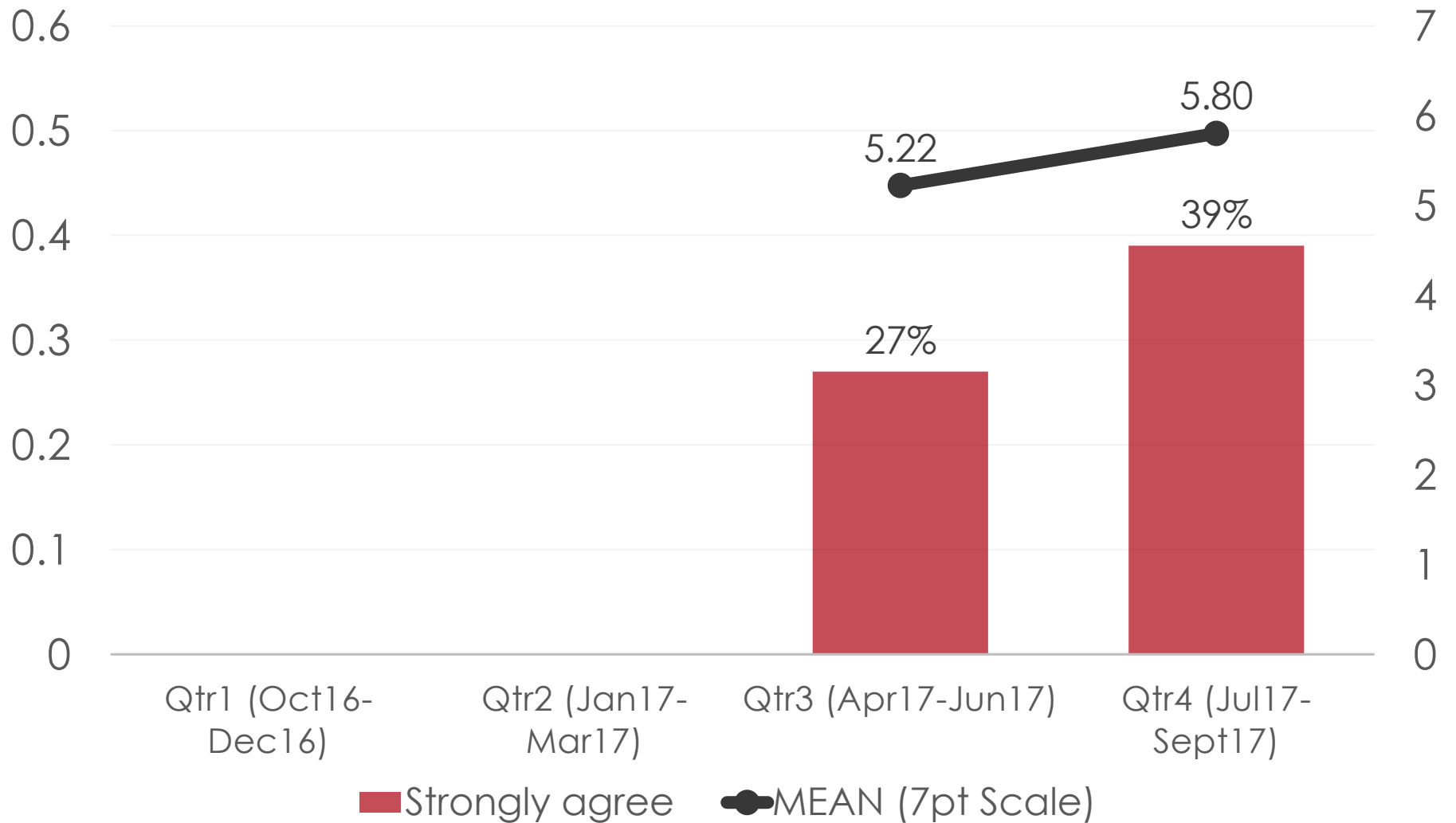
Not enough night time activities



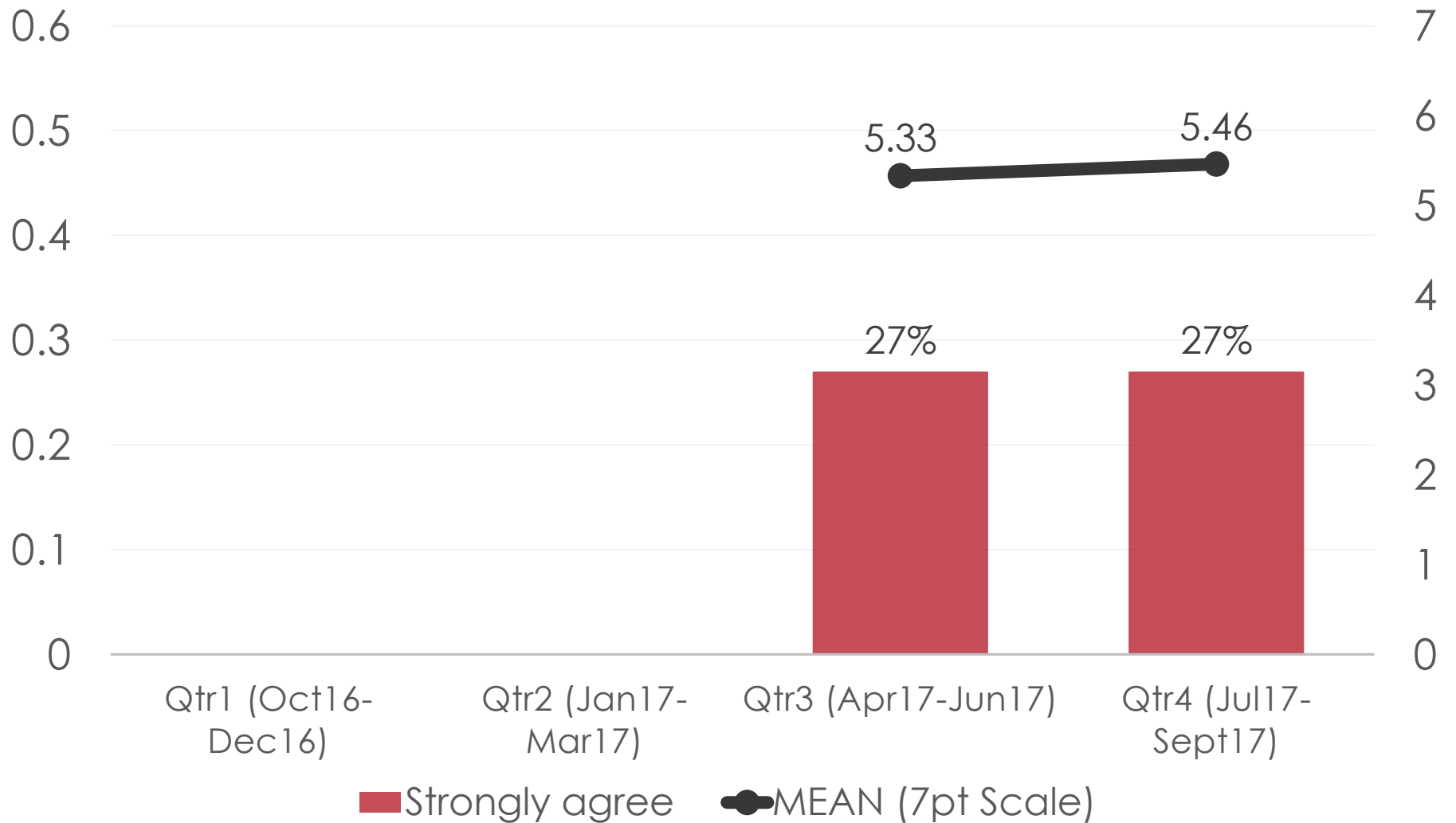
Tour guides were professional



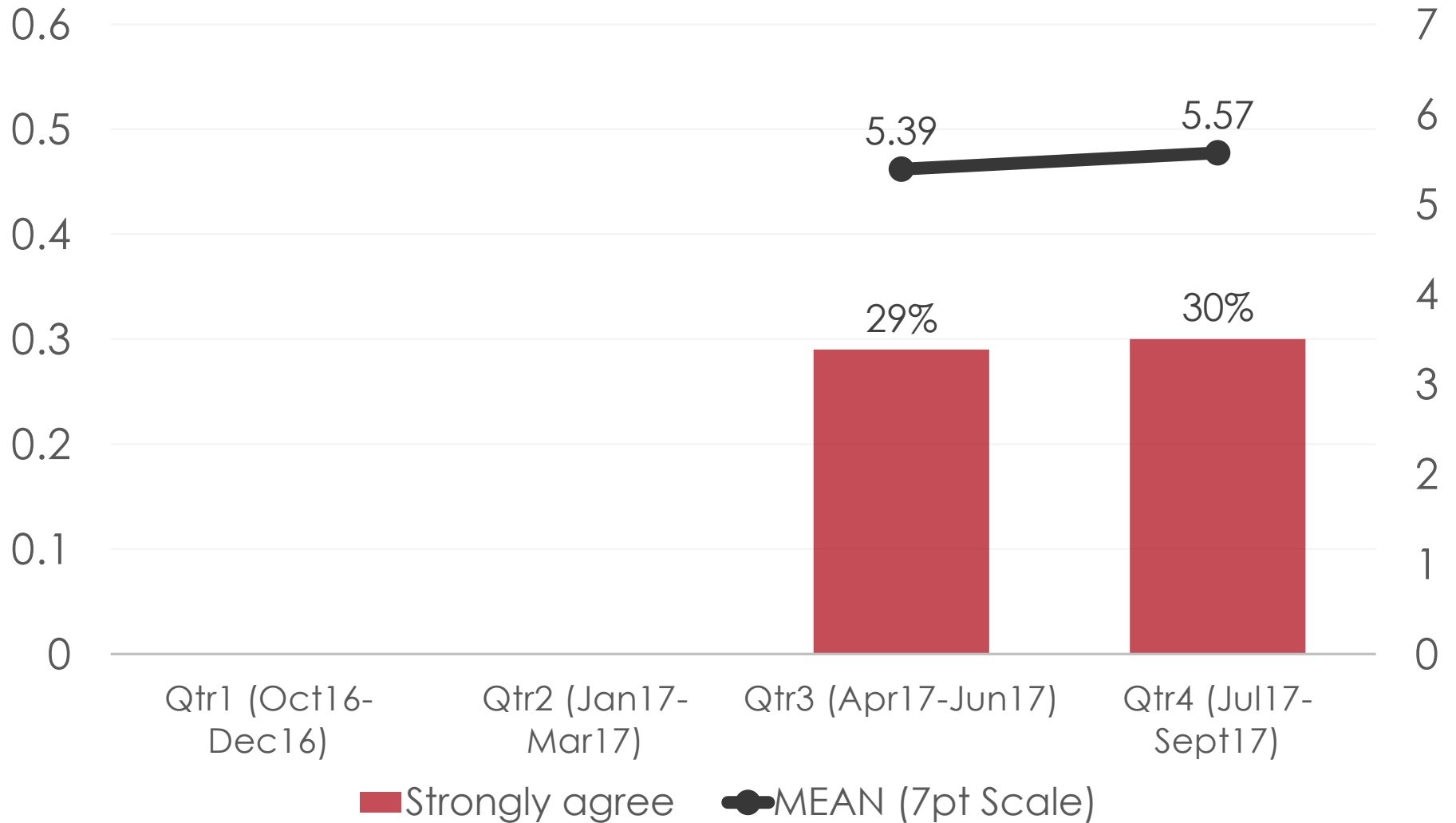
Tour drivers were professional



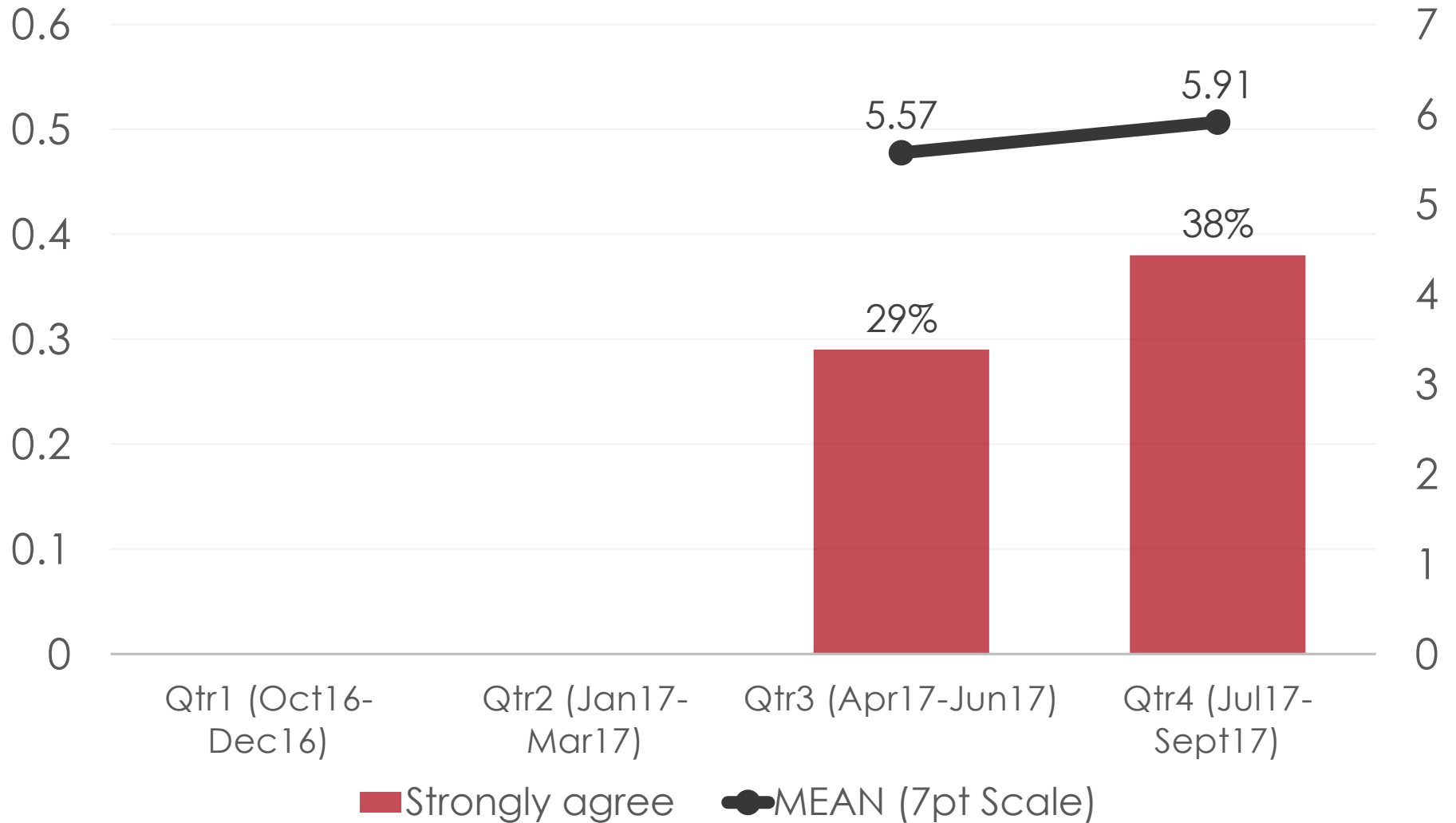
Taxi drivers were professional



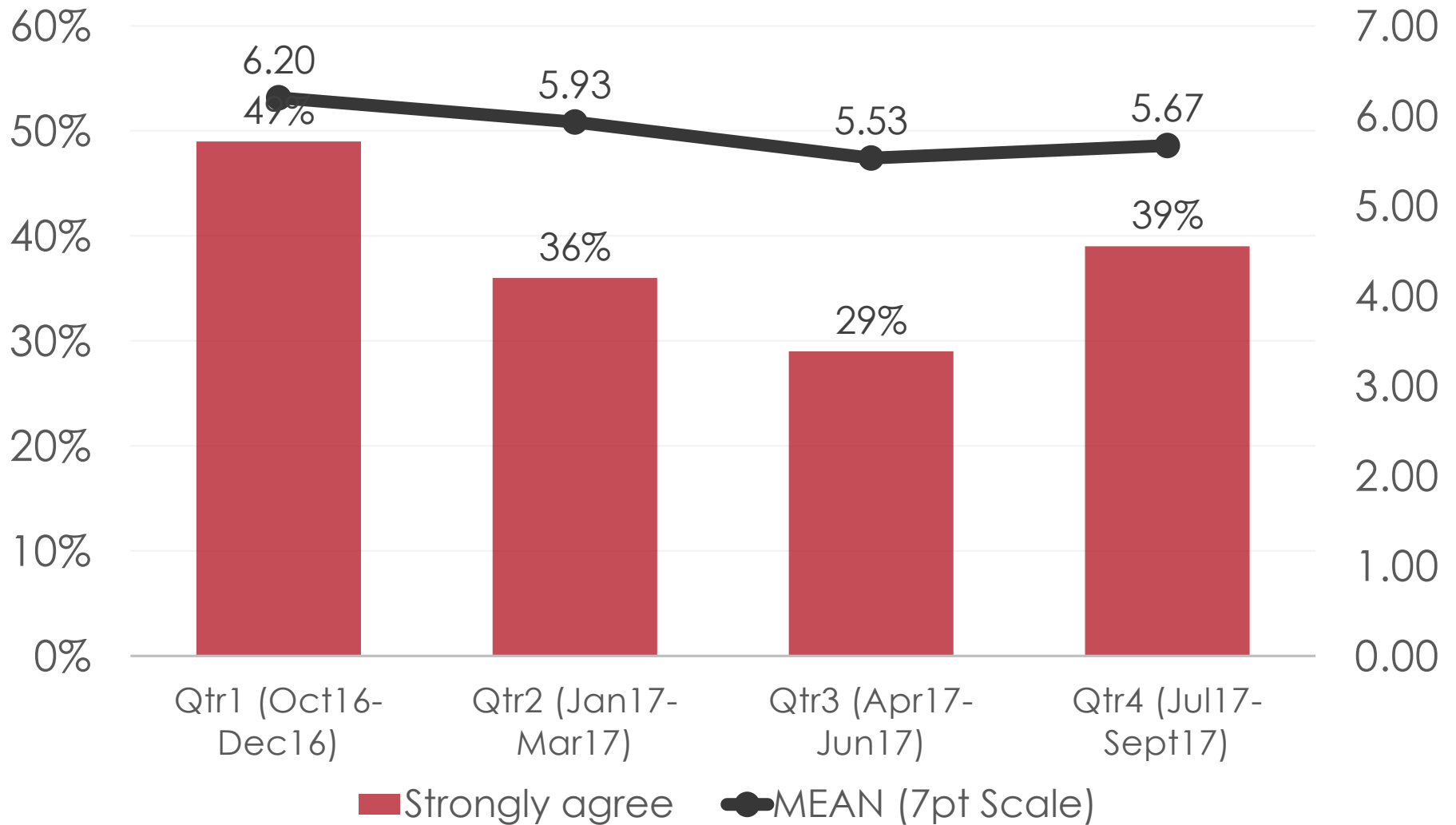
Taxis were clean



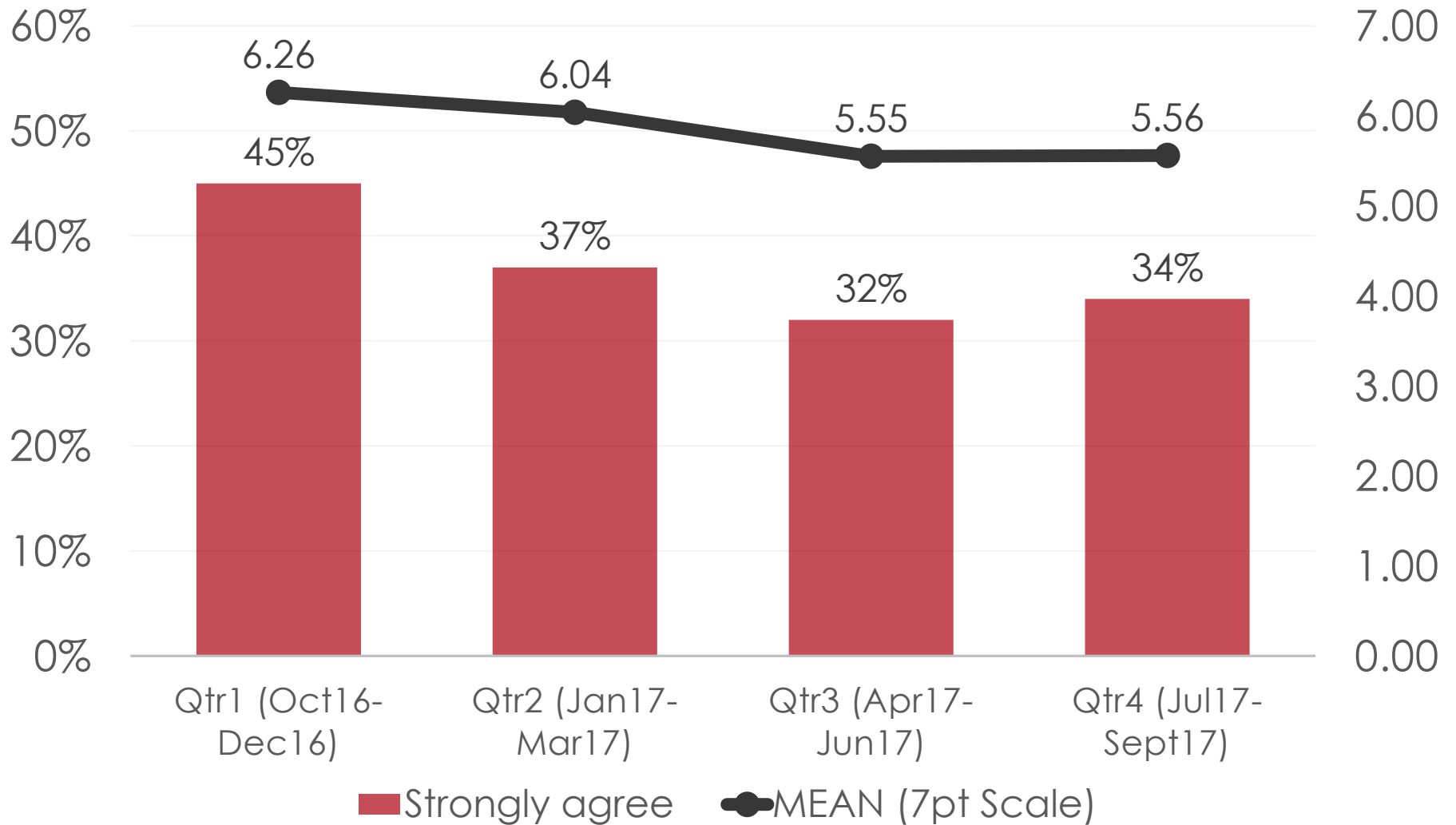
Guam airport was clean



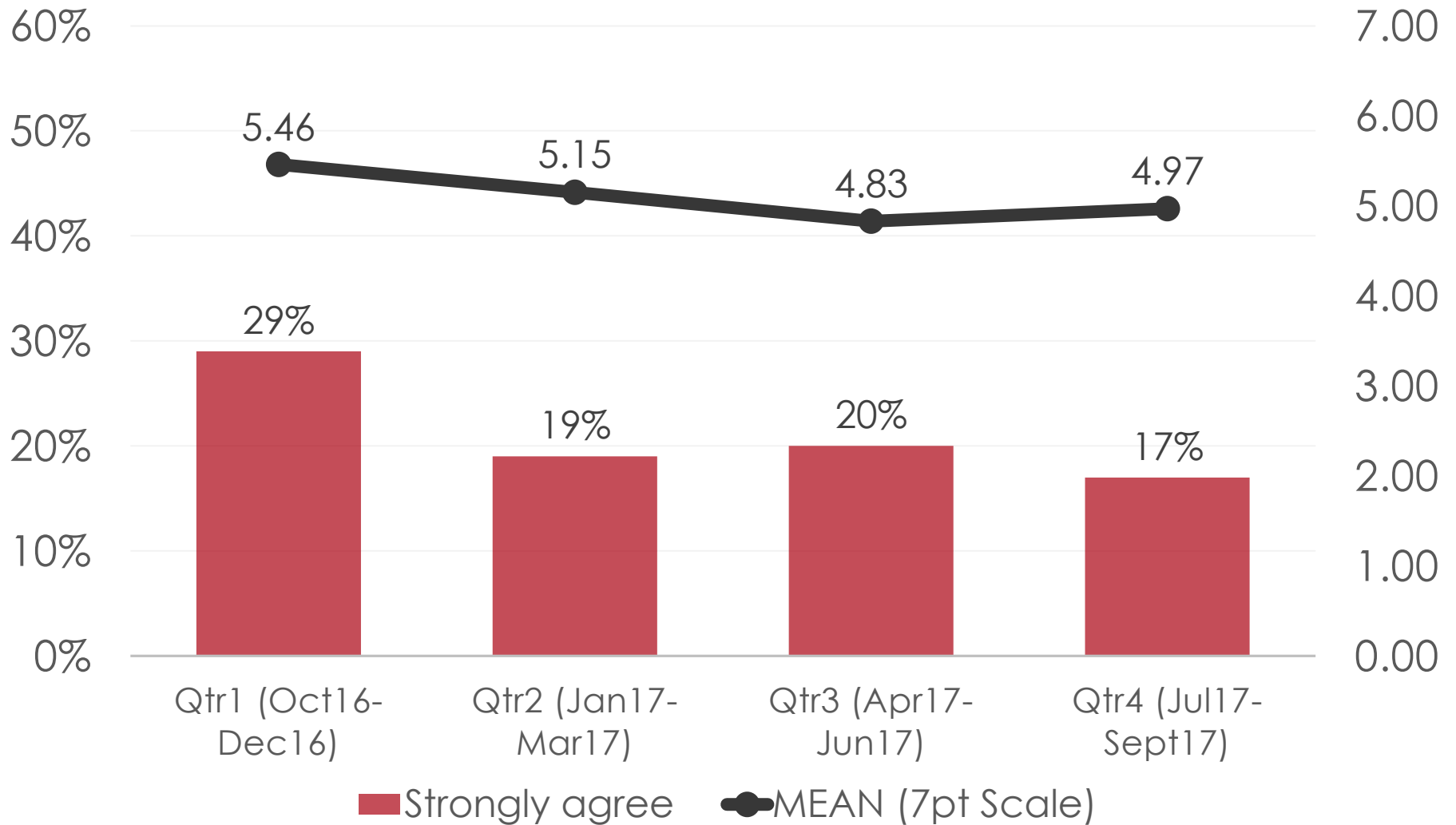
Ease of getting around



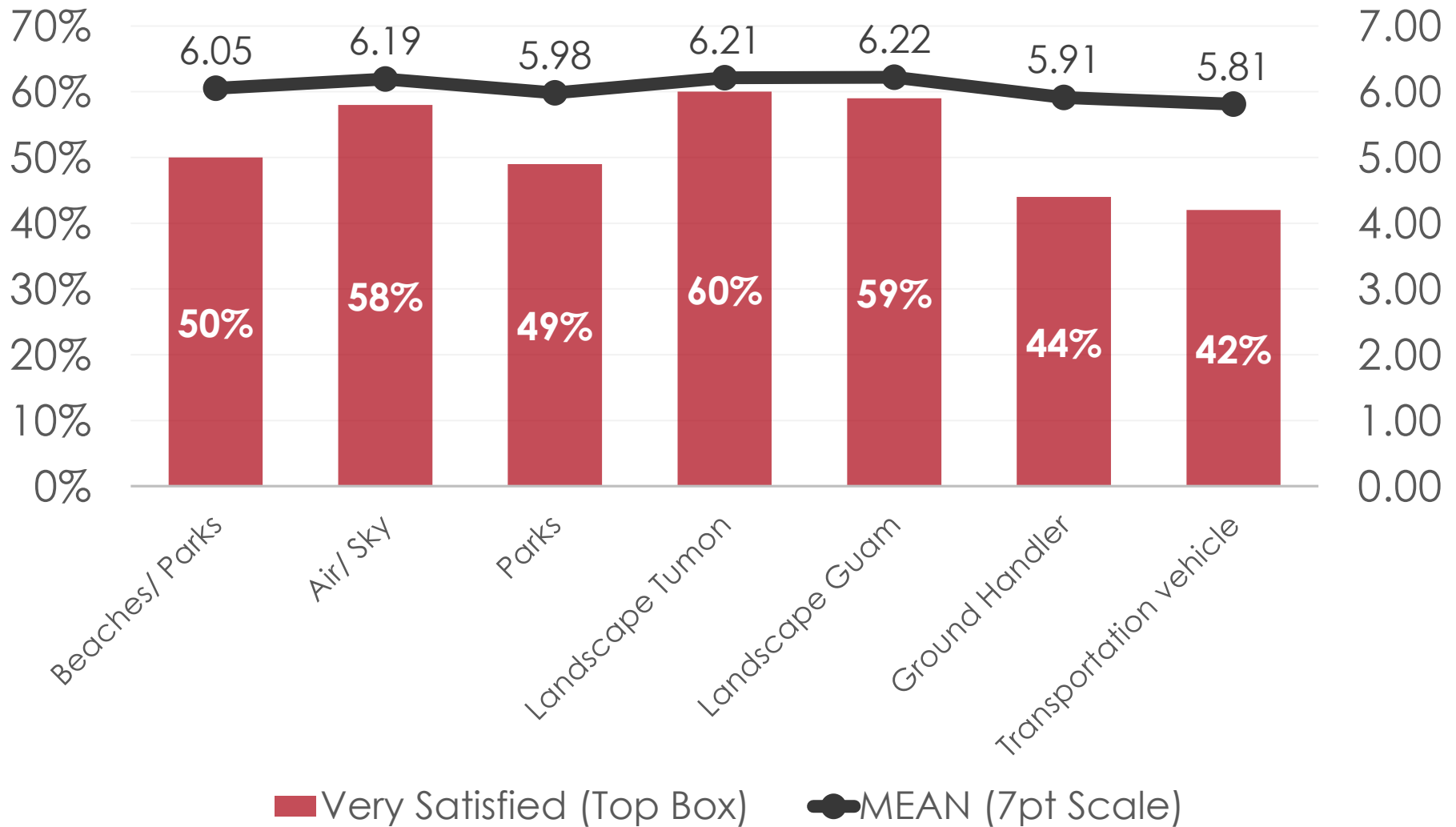
Safety walking around at night



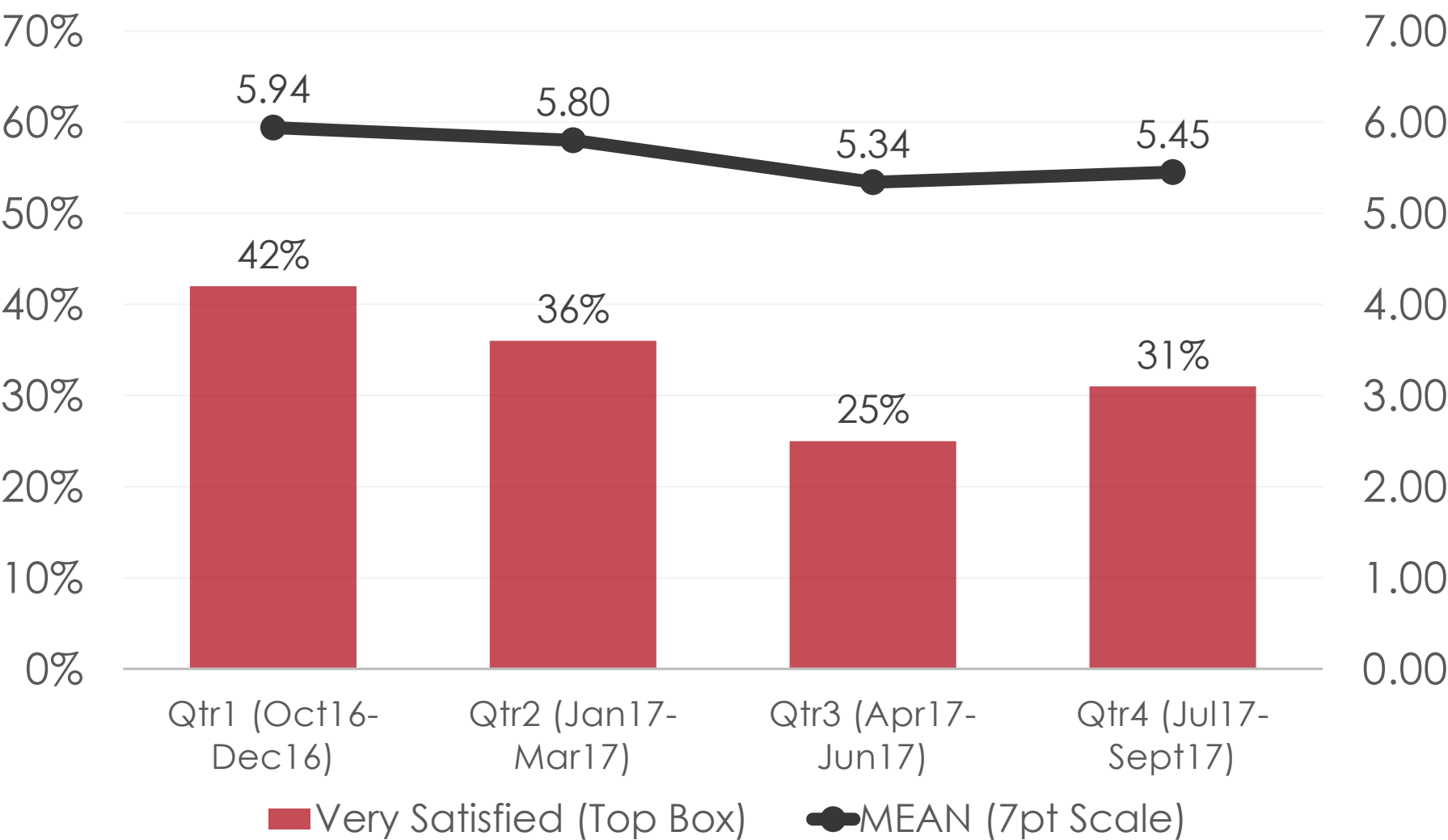
Price of things on Guam



GENERAL SATISFACTION – Quality/ Cleanliness

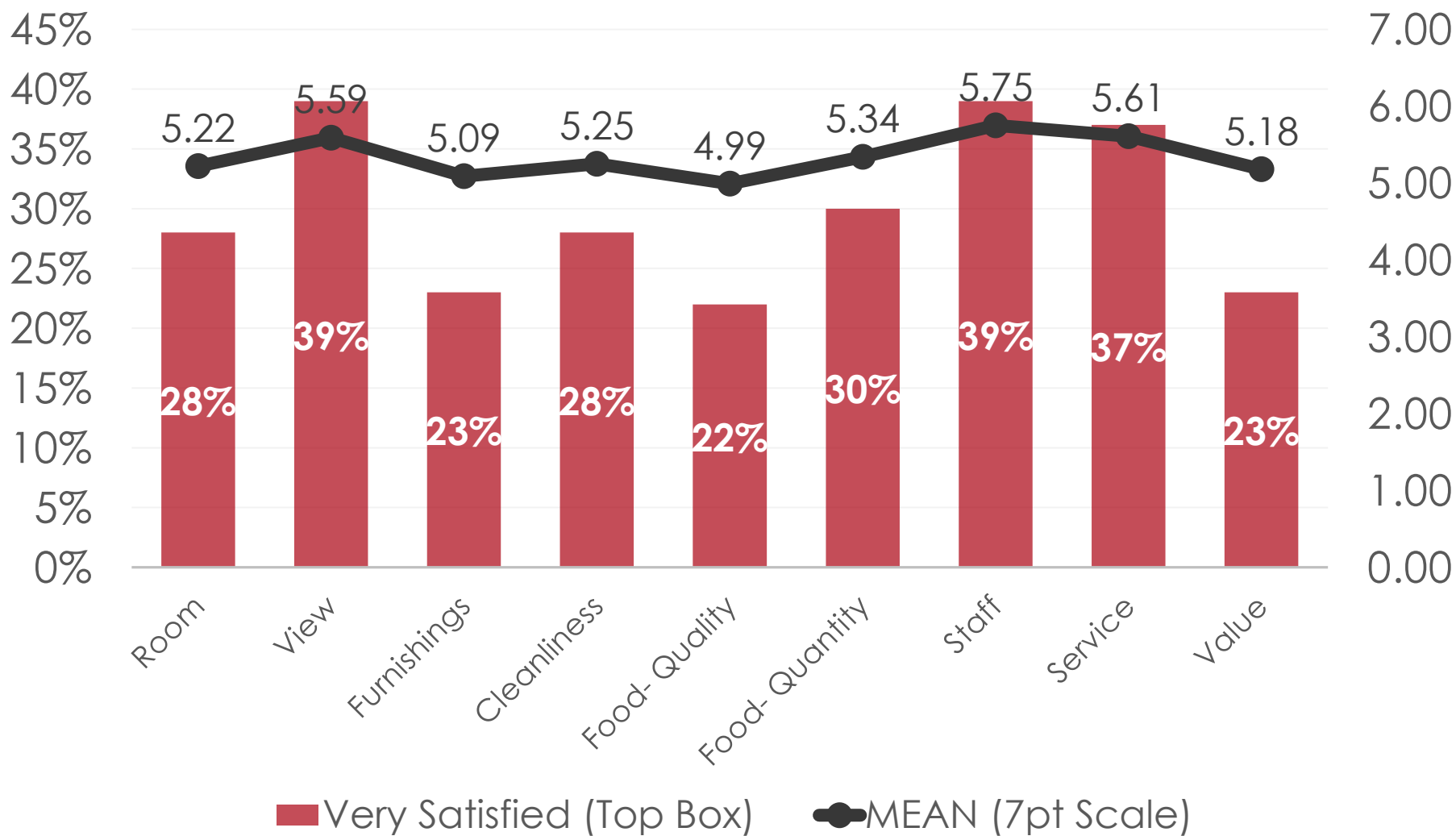


ACCOMMODATIONS – OVERALL SATISFACTION

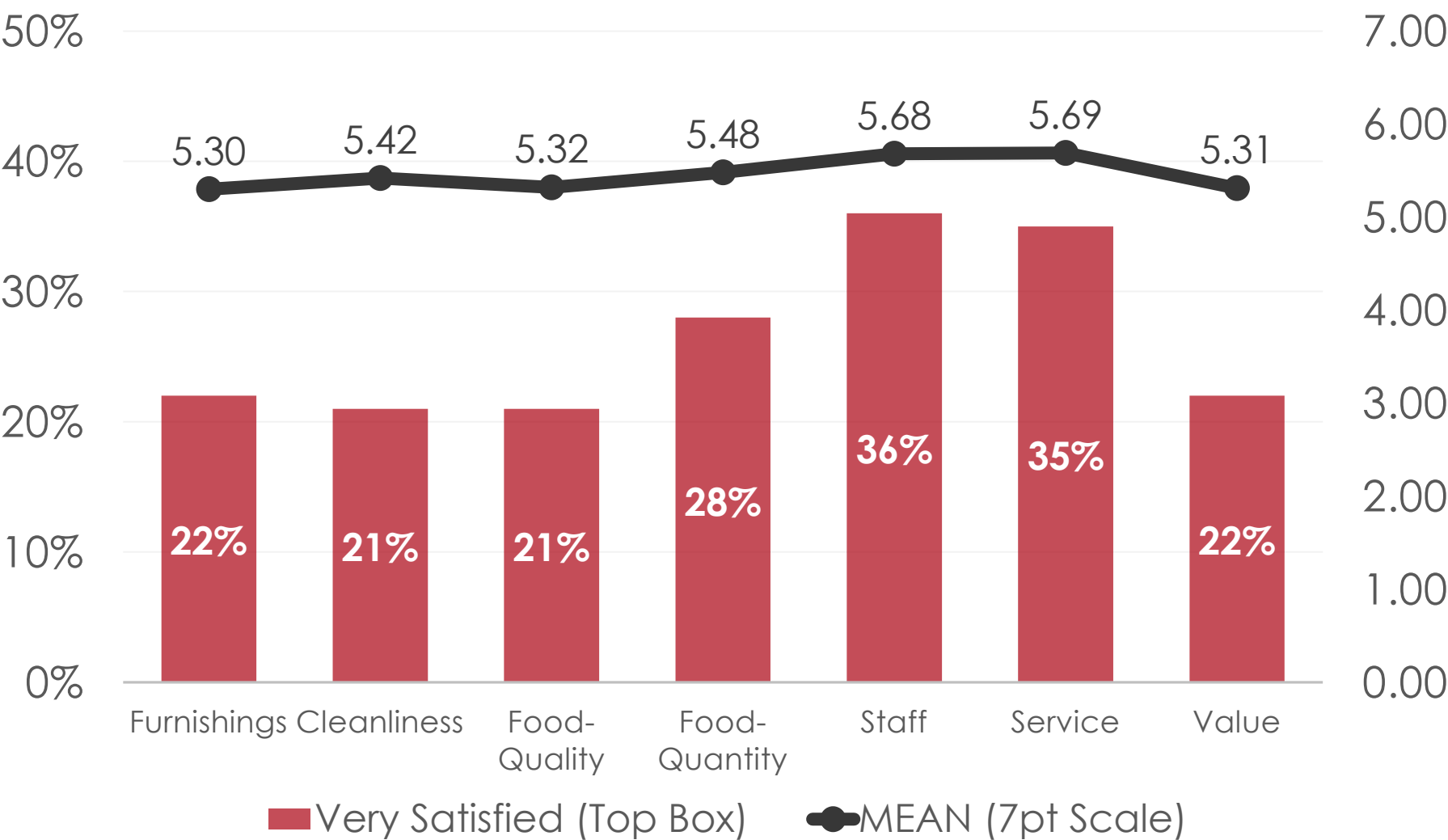


ACCOMMODATIONS –

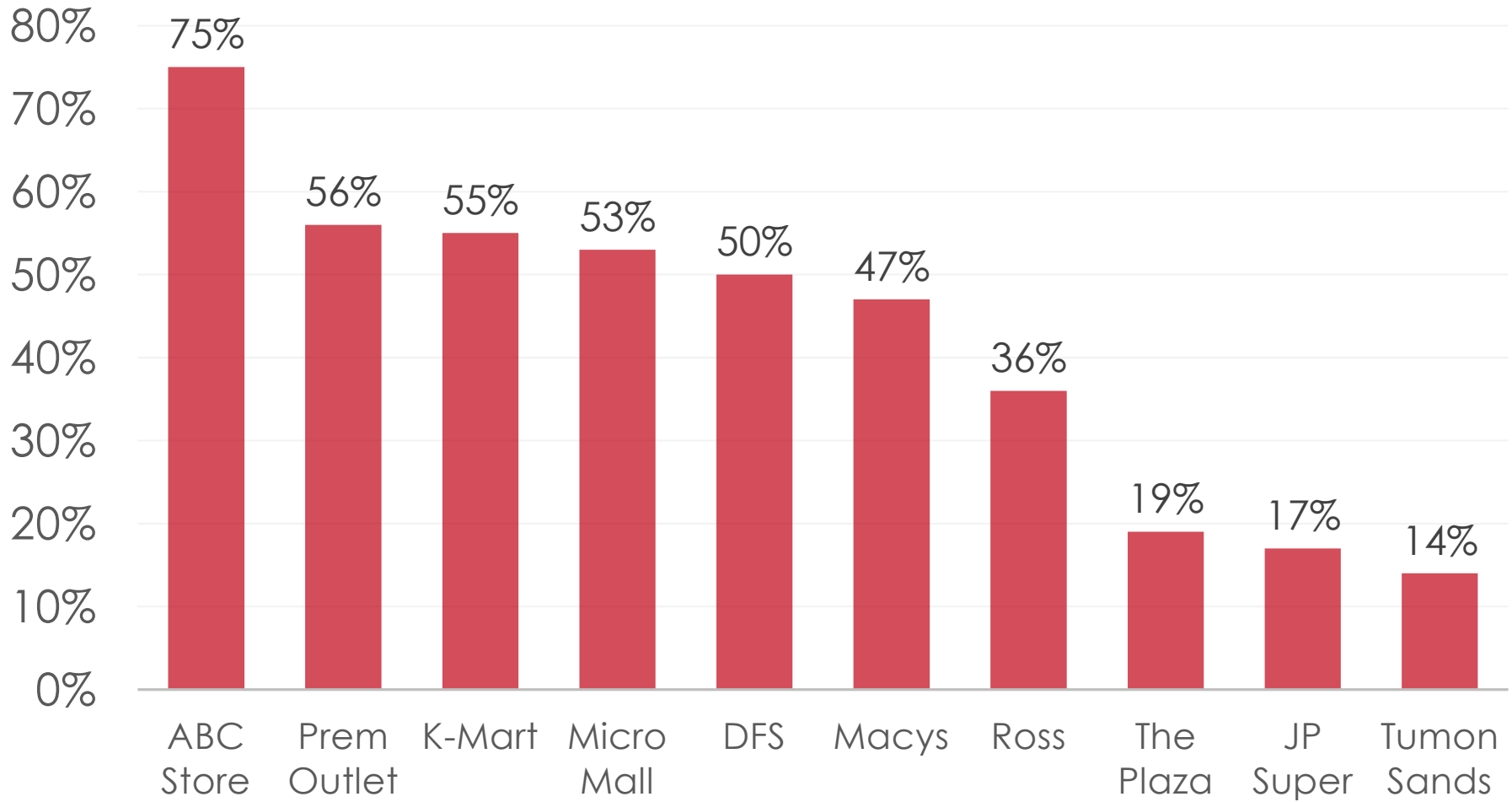
Satisfaction by Category



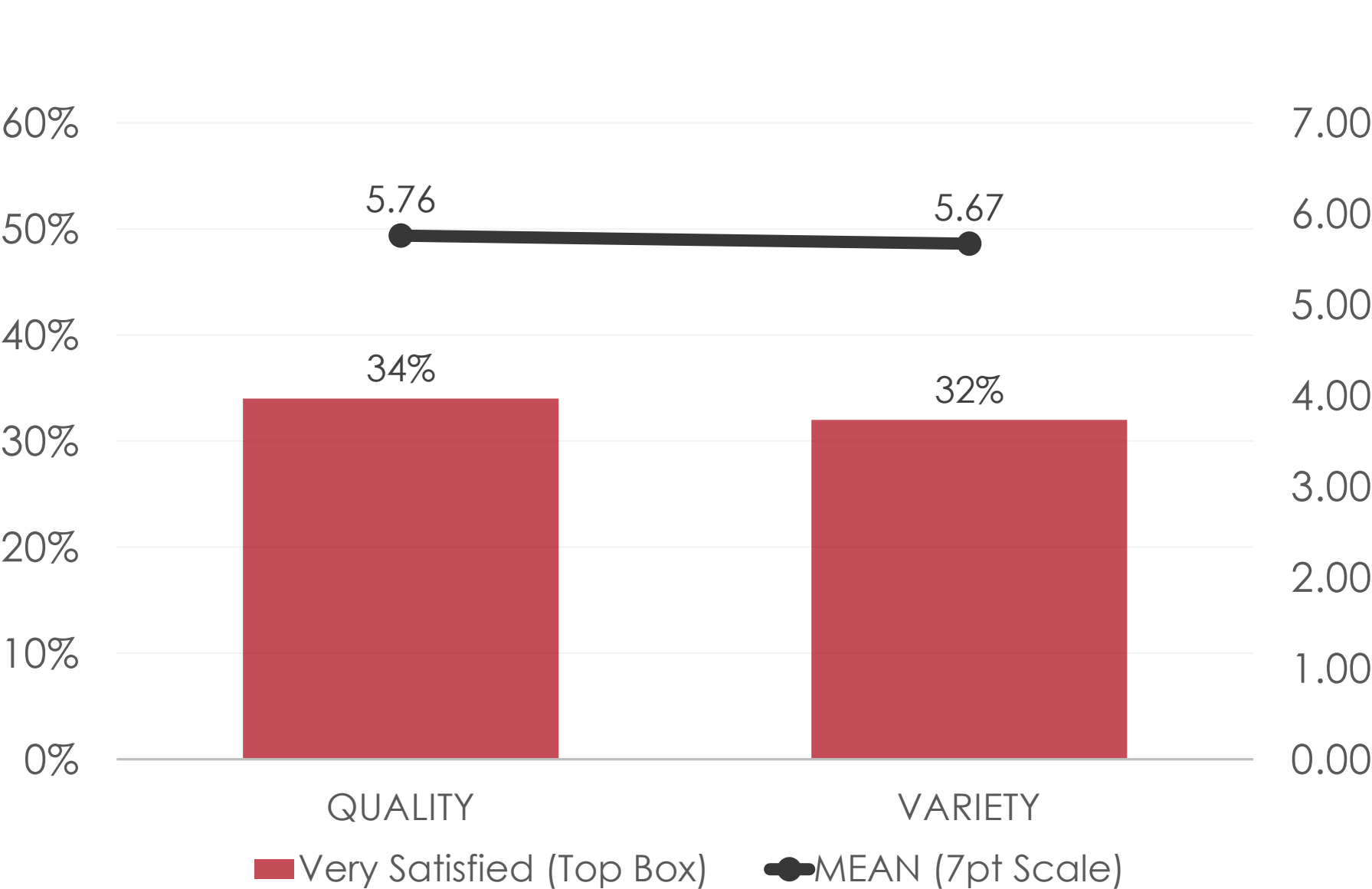
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



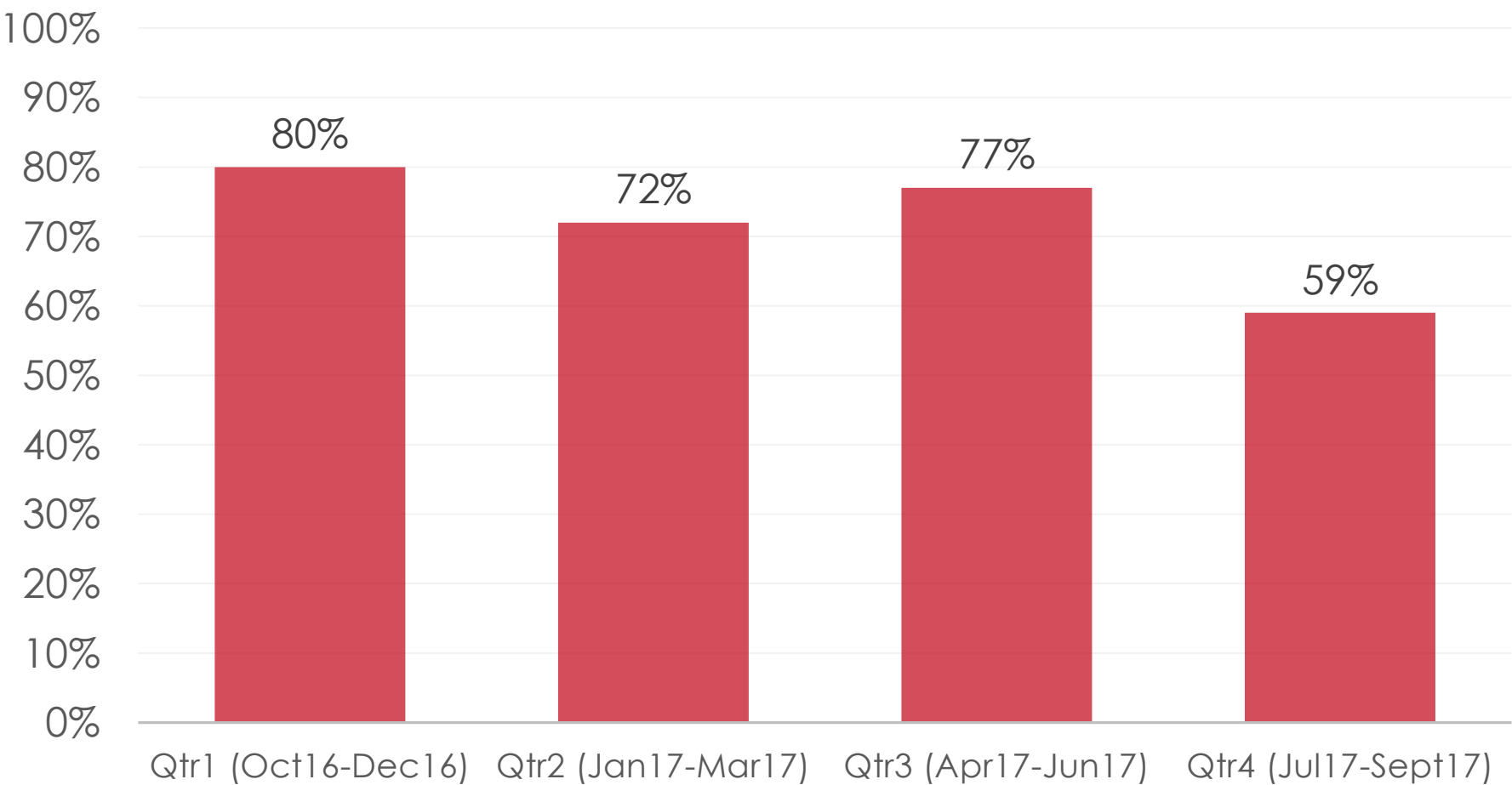
Shopping Malls/ Stores (Top Responses)



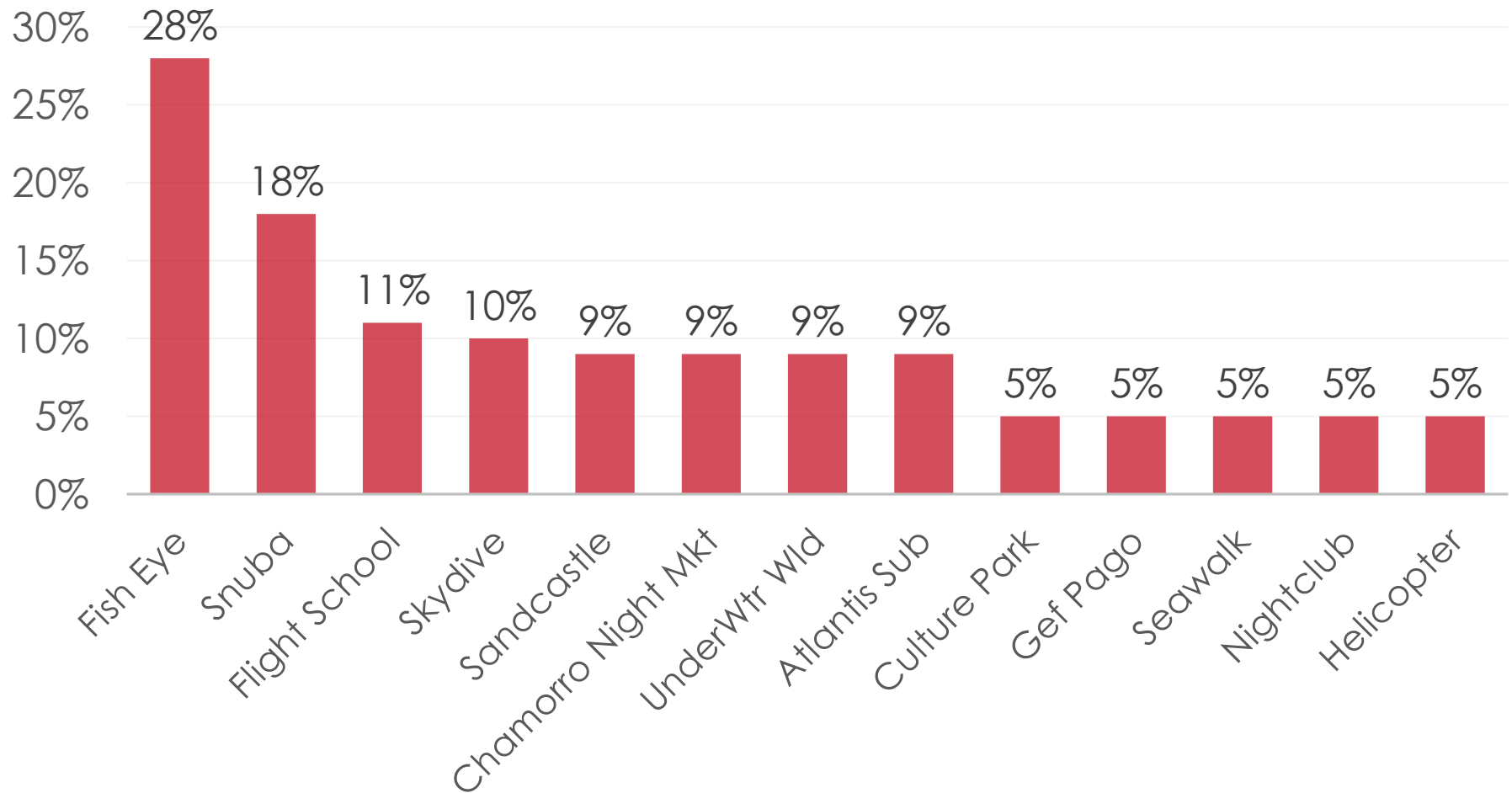
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION

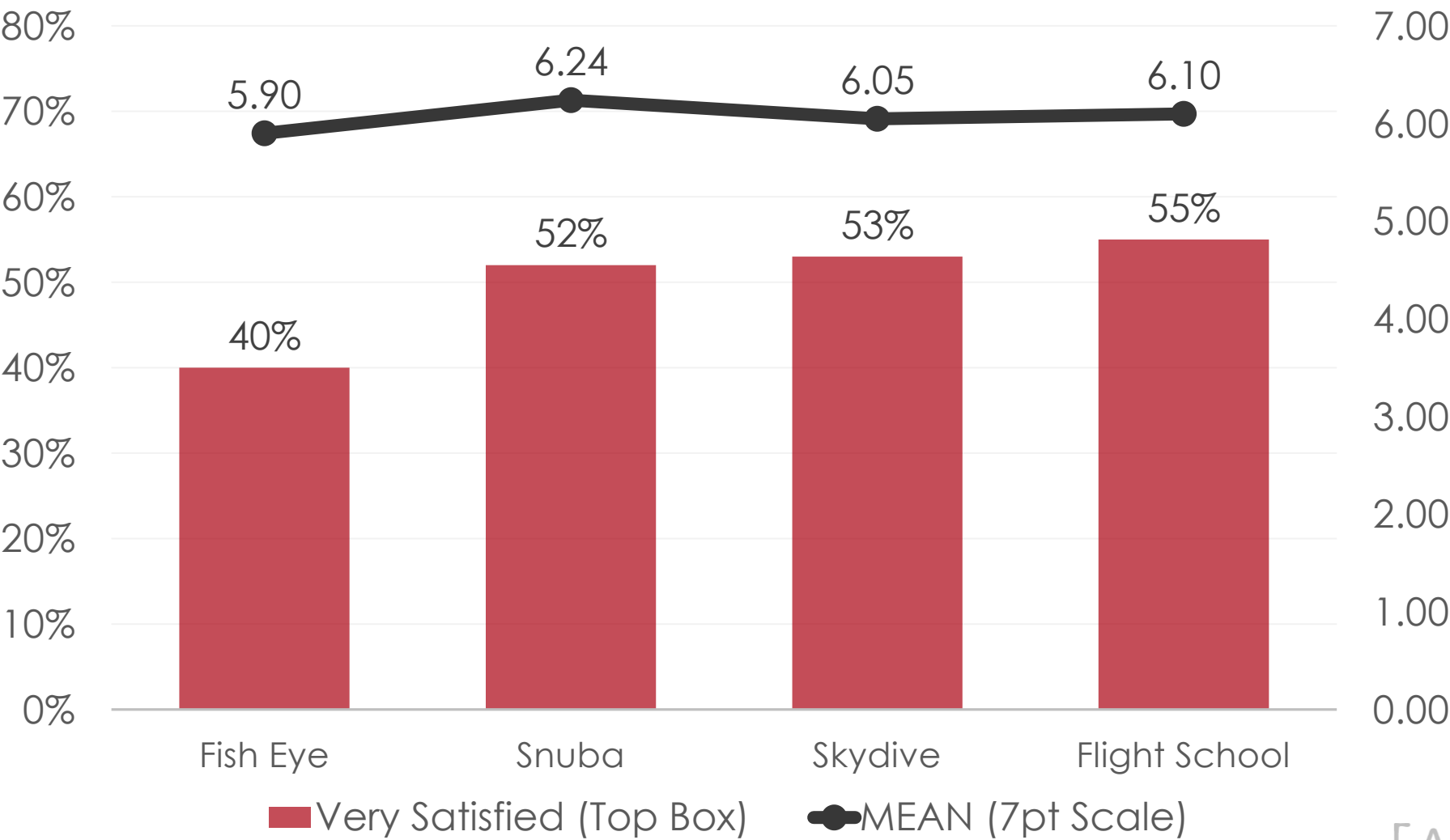


Optional Tour Participation (Top Responses)

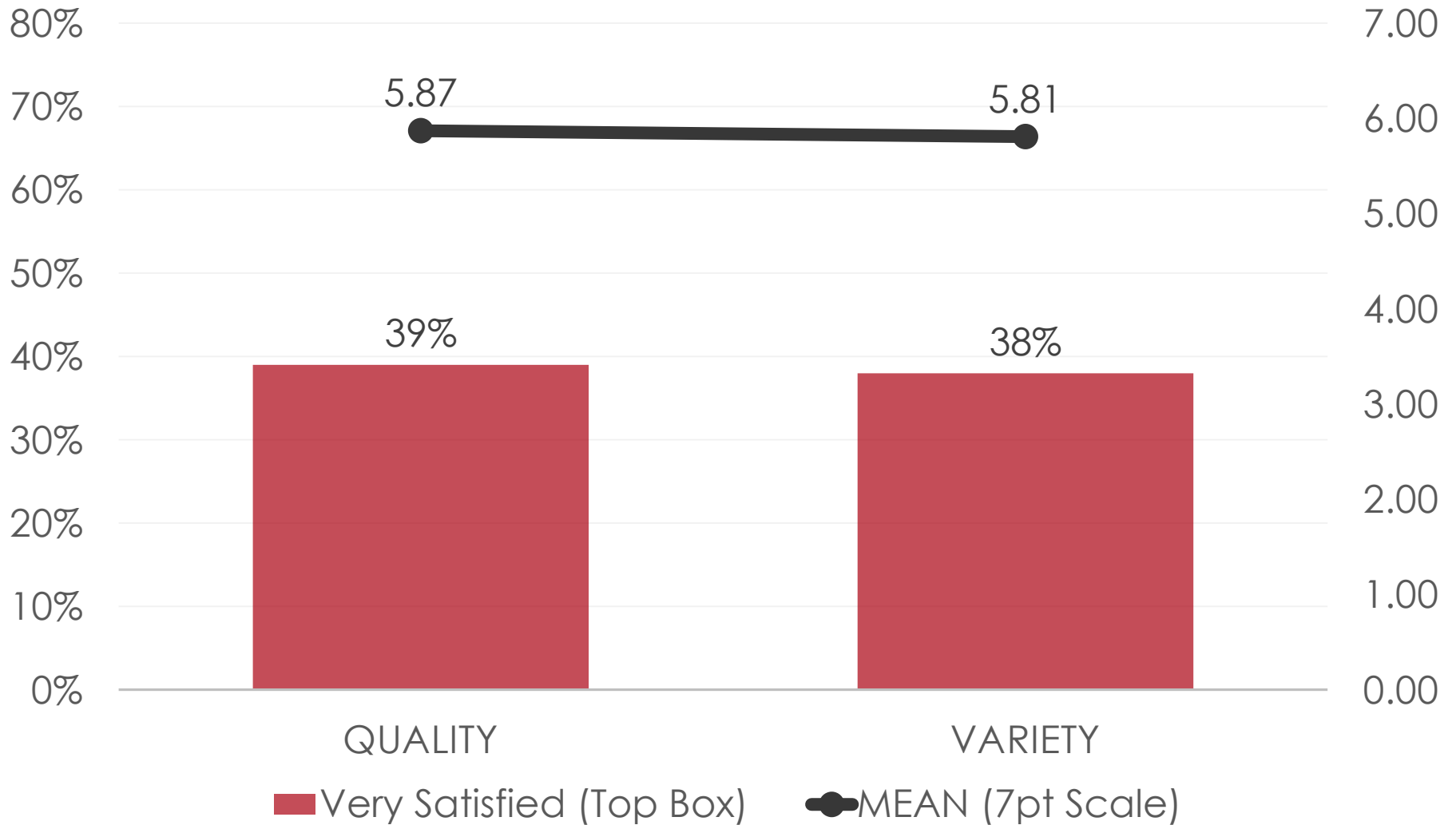


Optional Tour Satisfaction

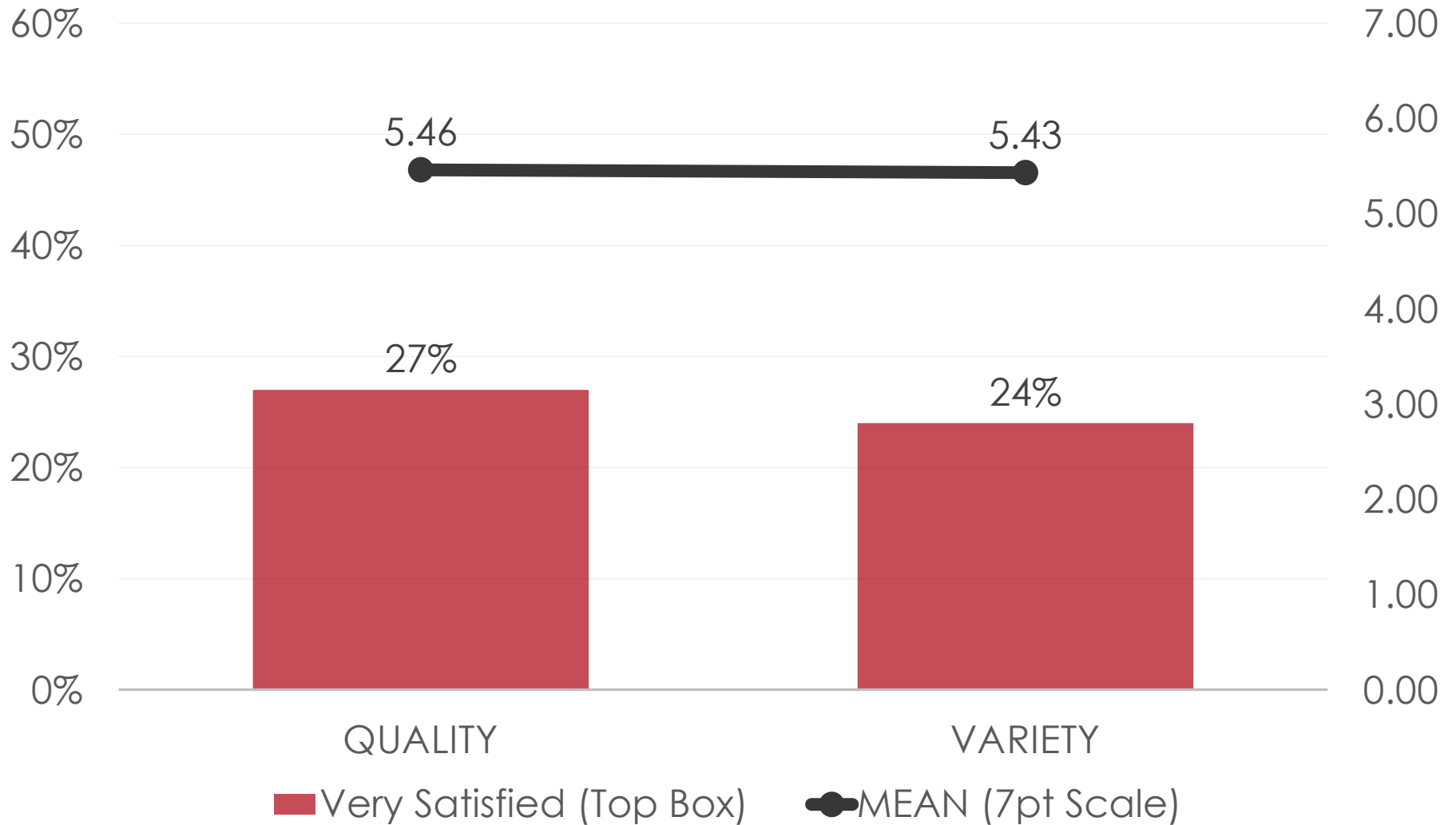
Top Responses only - Participation (10%+)



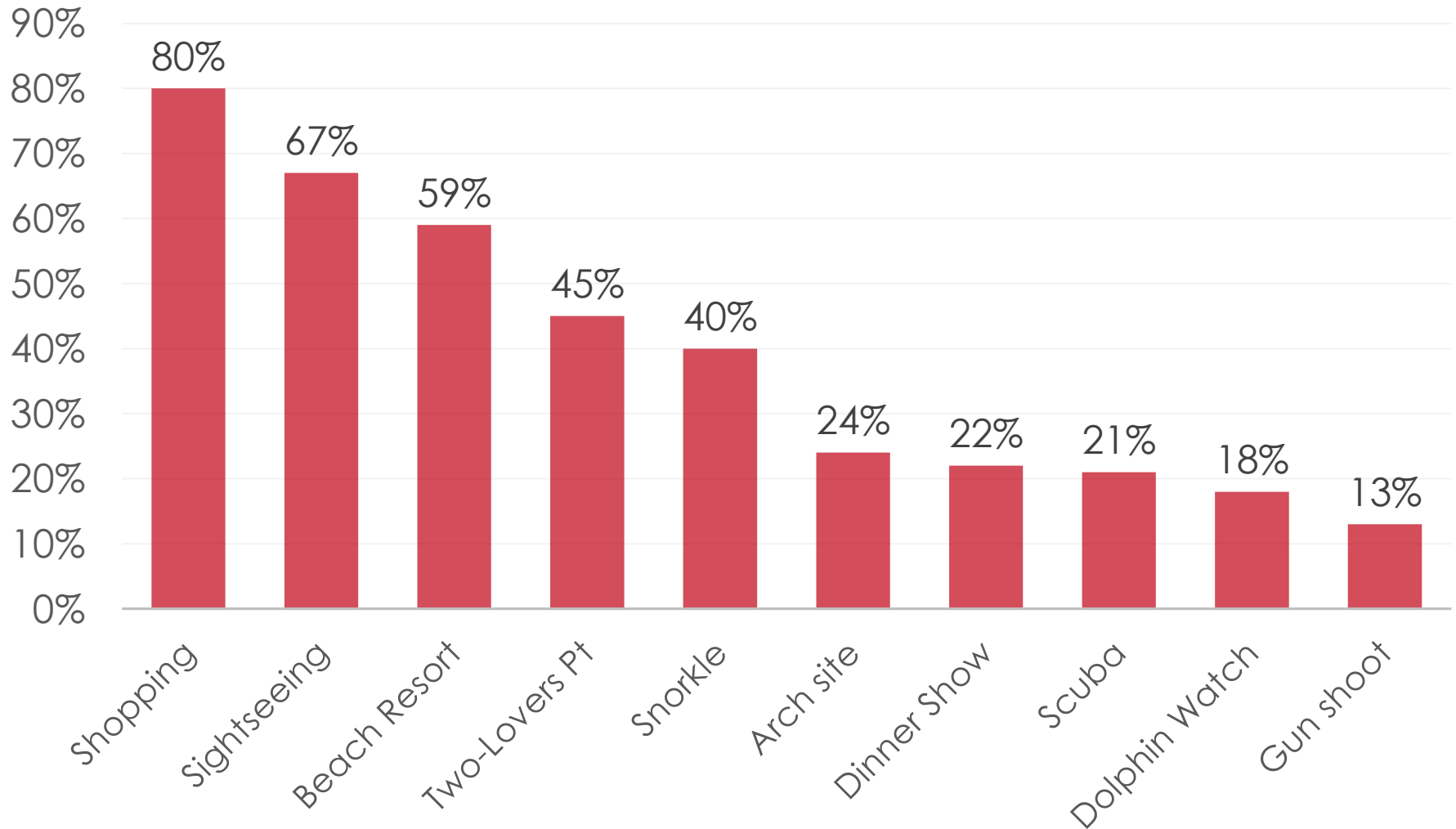
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION



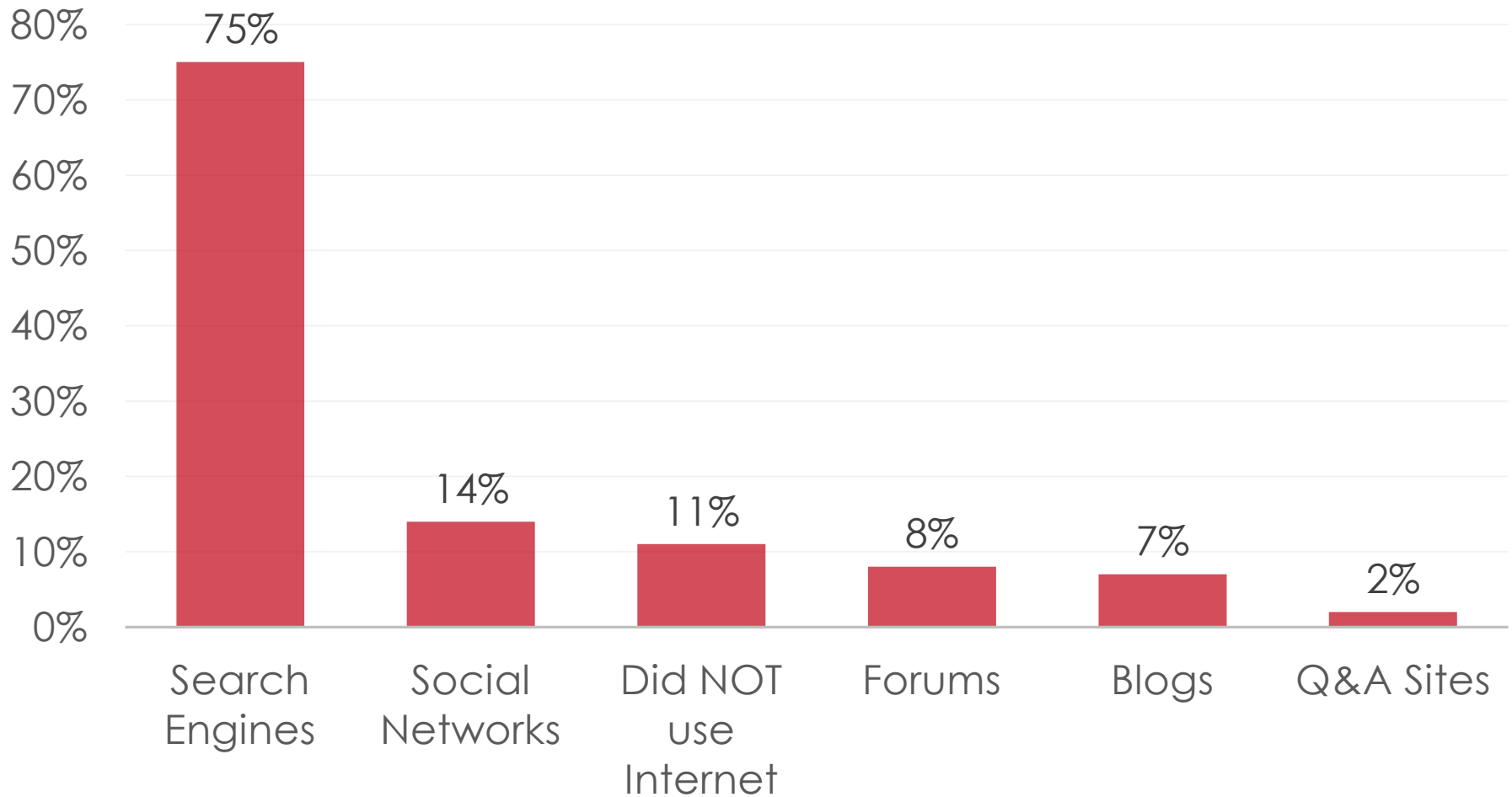
Activities Participation (Top Responses)



SECTION 5

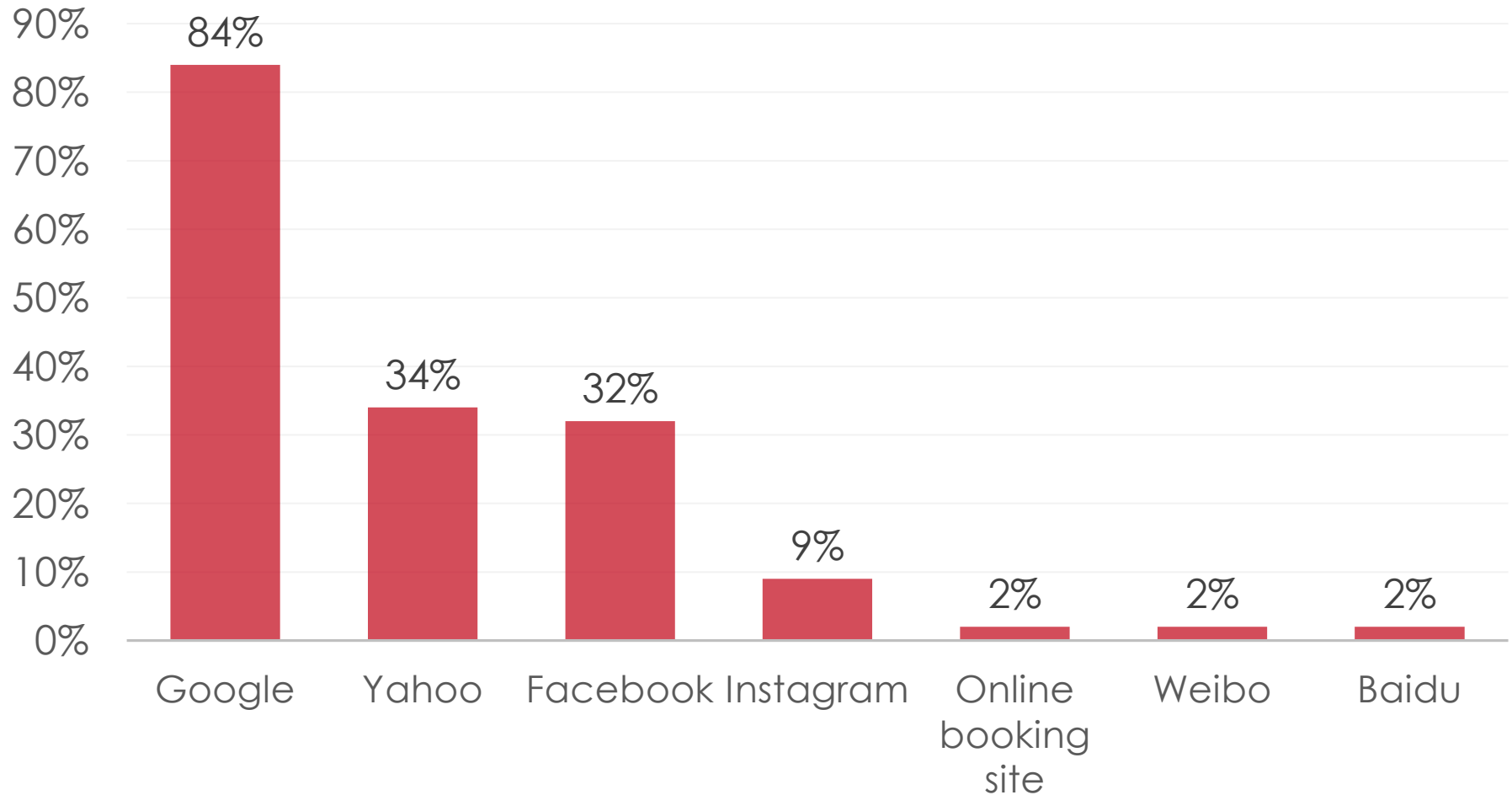
PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



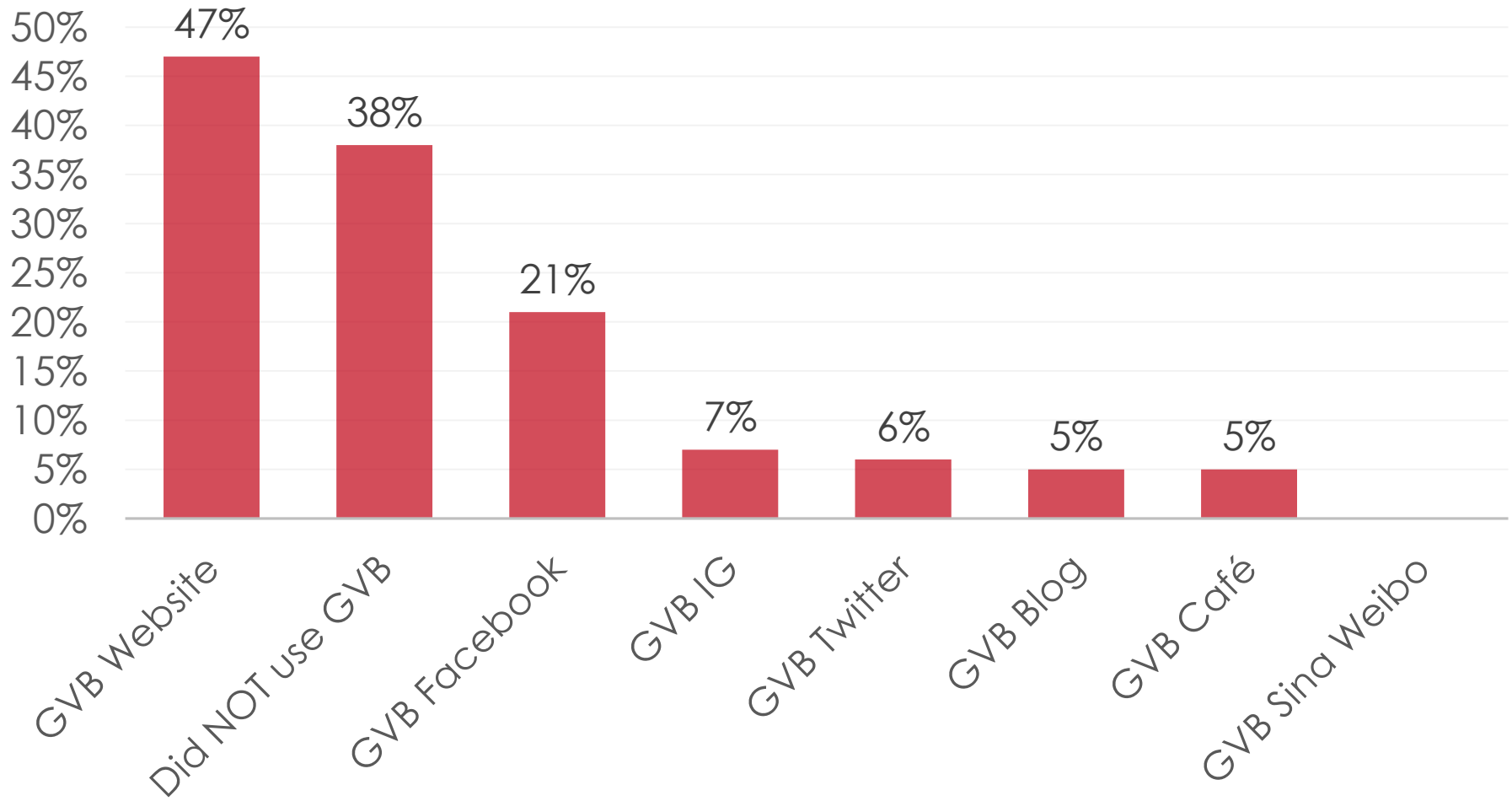
INTERNET- SOURCES OF INFORMATION

Things to do on Guam

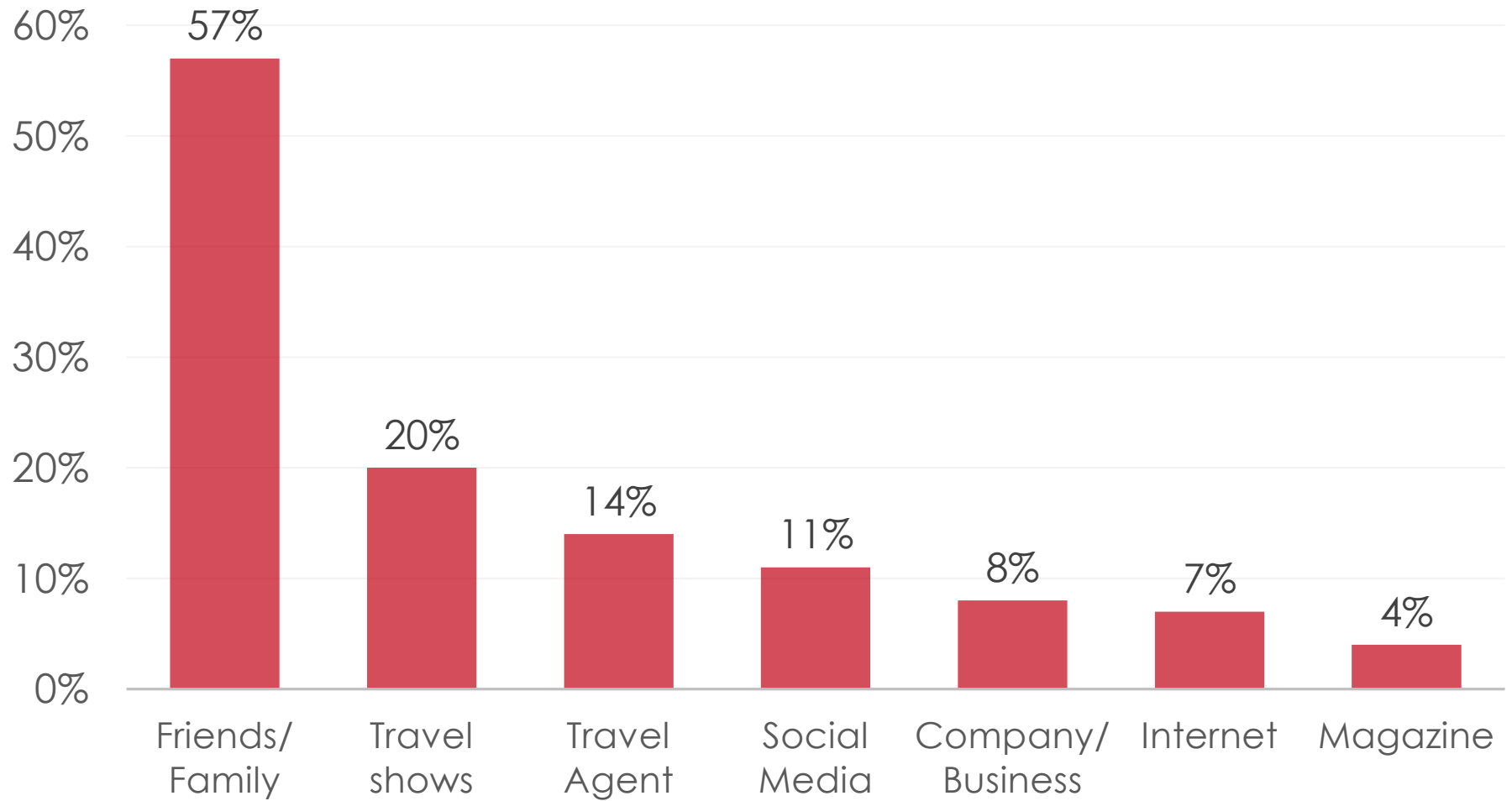


INTERNET- SOURCES OF INFORMATION

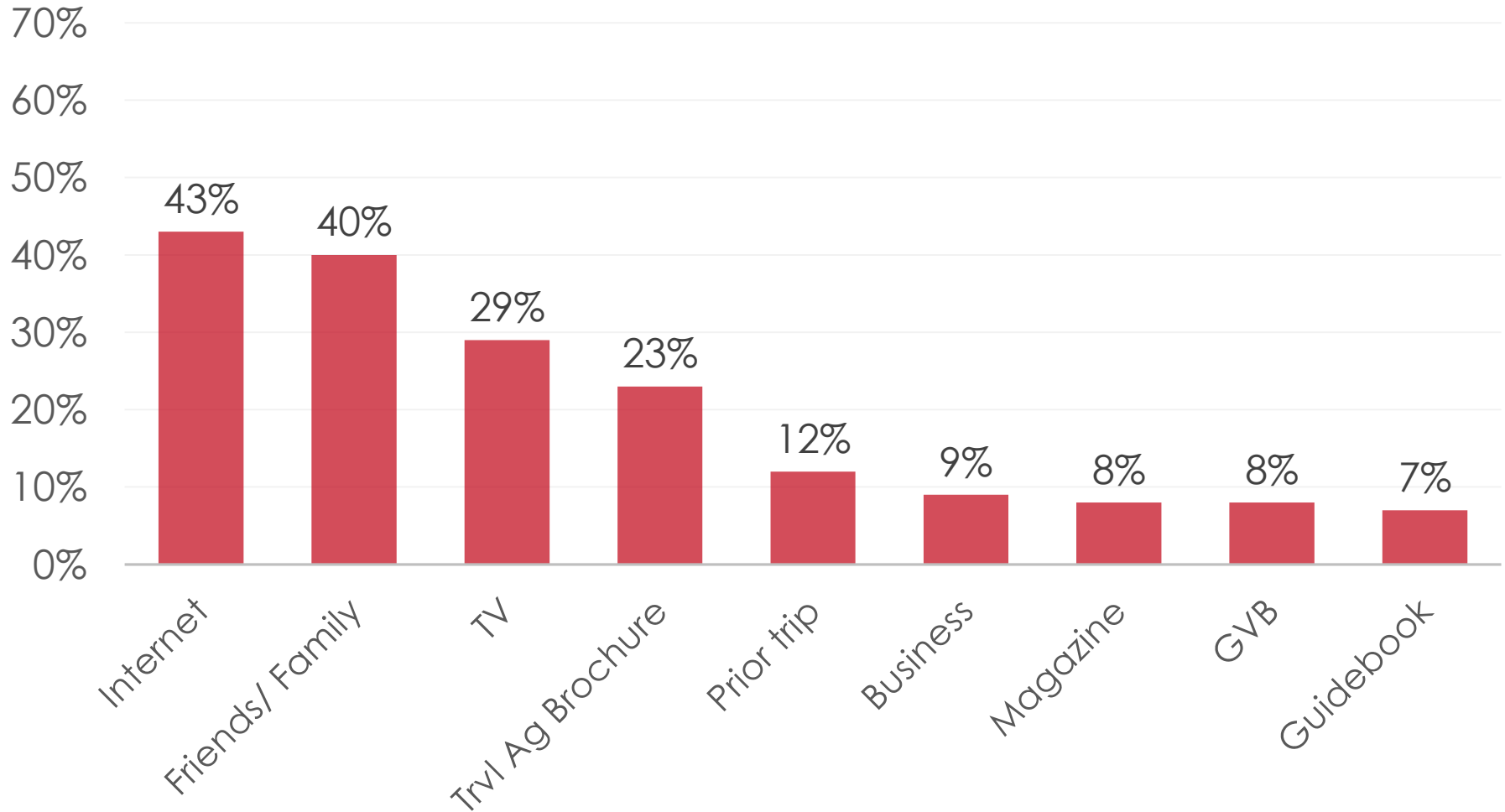
GVB



TRAVEL MOTIVATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

GVB EXIT SURVEY

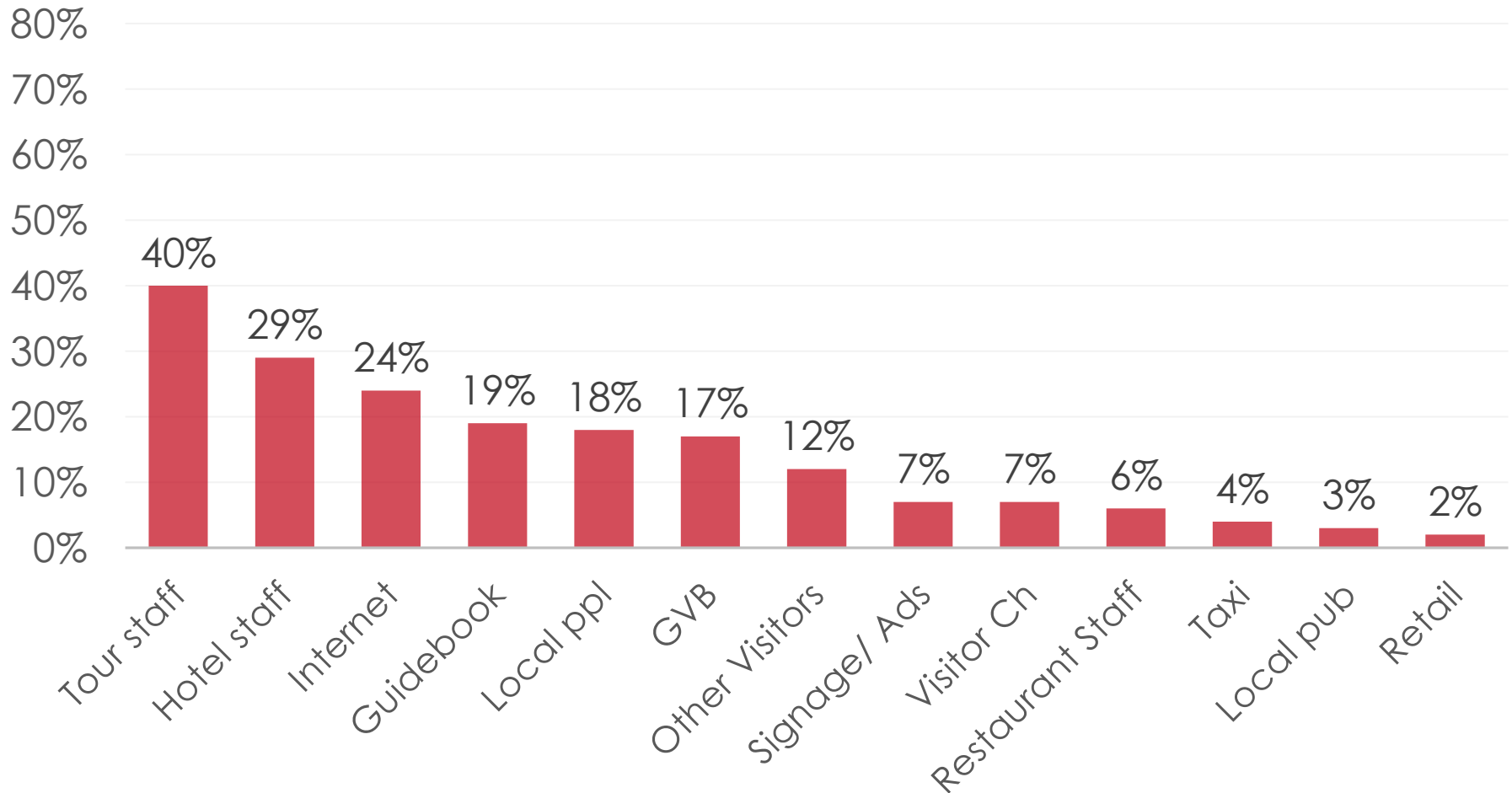
Q1 Please select the top three sources of information you used to find out about Guam before your trip:

		TOTAL	MICE	SPORT/ ADV	WEDDING	HONEYMOON
		-	-	-	-	-
Q1	Internet/Mobile App	43%	33%	48%	100%	29%
	Friend or relative	40%	33%	39%	100%	57%
	TV	29%	33%	34%		29%
	Travel agent brochure	23%	33%	32%	50%	43%
	I have been to Guam before	12%		11%		29%
	Co-worker/ company travel department	9%	33%	5%		
	Magazine (consumer)	8%	33%	6%		
	Guam Visitors Bureau promotional activities	8%		11%		
	Travel trade shows	8%		10%		29%
	Travel guide book at bookstores	7%		7%		
	Consumer travel shows	4%		4%		29%
	Newspaper	2%	33%	3%		
	Guam Visitors Bureau office	2%		2%		
	Total	183	3	102	2	7

Prepared by Anthology Research

ONISLE

SOURCES OF INFORMATION



ON-ISLE SOURCES OF INFORMATION – Key Segments

GVB EXIT SURVEY

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

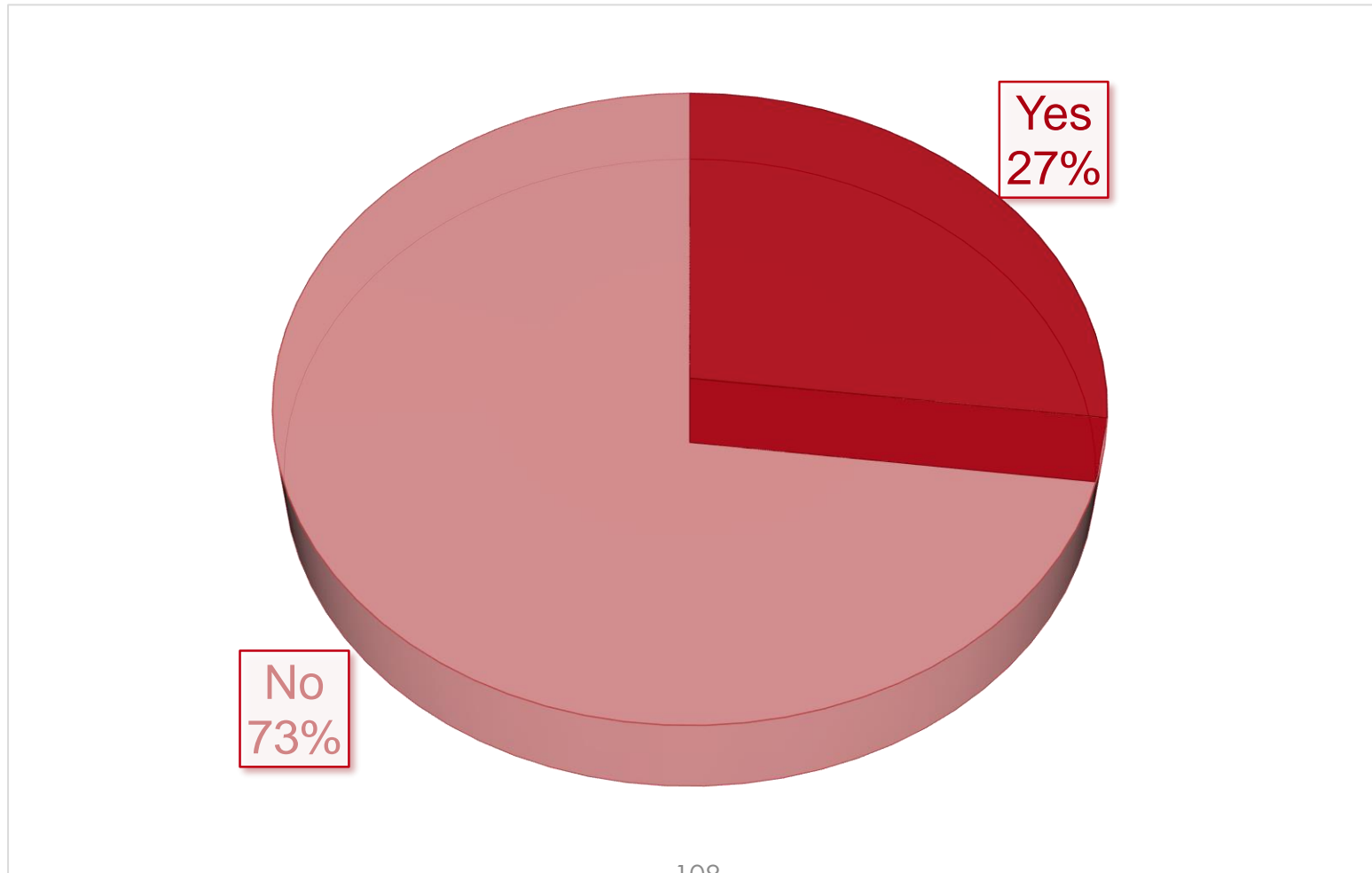
		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOON
		-	-	-	-	-
Q2	Tour staff	40%	33%	45%	100%	43%
	Hotel staff	29%		26%	100%	14%
	Internet/Mobile App	24%	33%	27%	100%	29%
	Guide books I brought with me	19%	33%	23%		43%
	Local people	18%		17%		29%
	Guam Visitors Bureau	17%		16%		43%
	Other visitors	12%	33%	12%		14%
	Visitors channel	7%		9%		14%
	Signs/ advertisement	7%		5%		
	Restaurant staff (outside hotel)	6%		8%		
	Taxi drivers	4%		5%		
	Local publication	3%		2%		
	Retail staff	2%		2%		
	Total	181	3	102	2	7

Prepared by Anthology Research

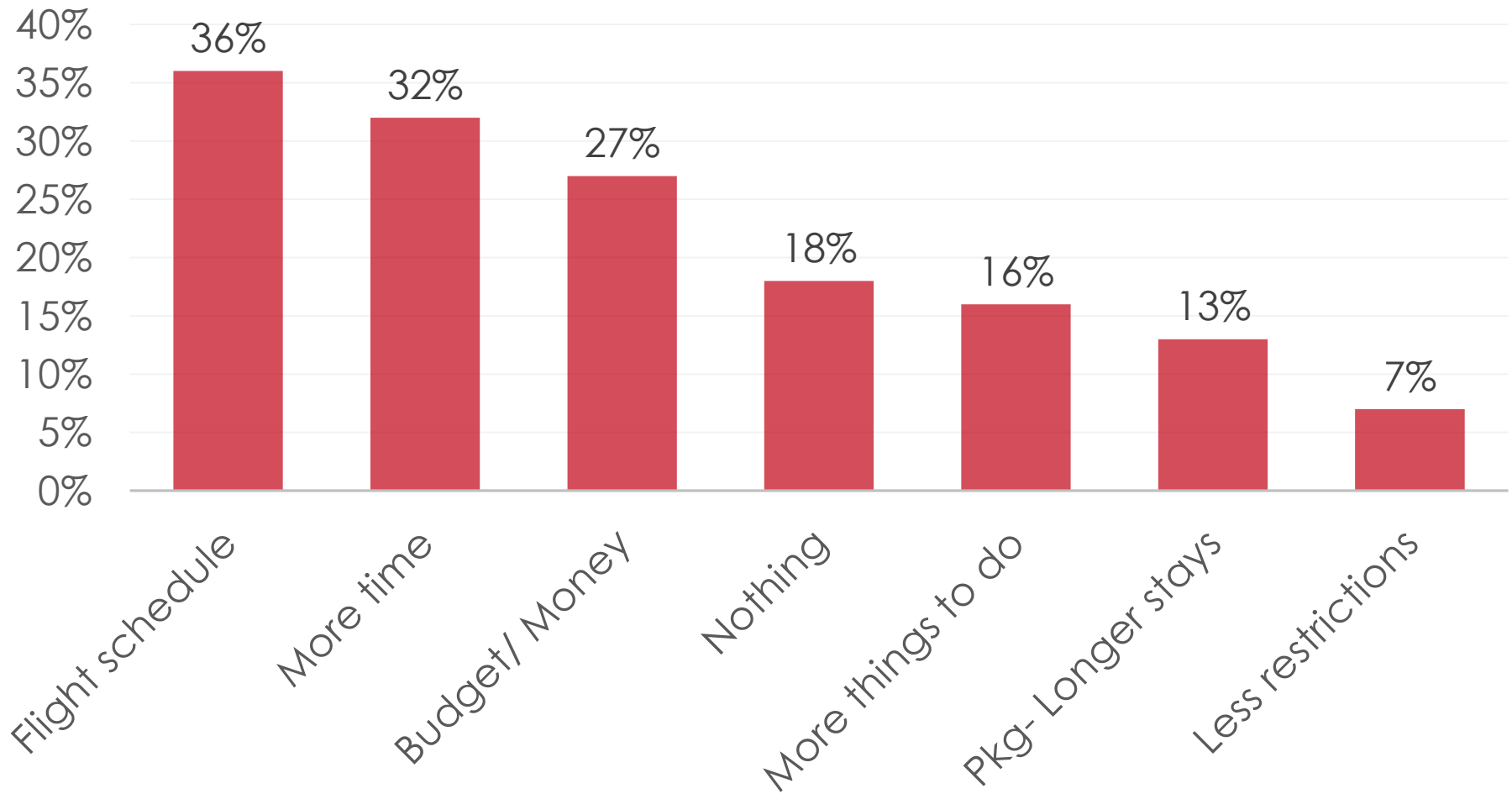
SECTION 6

FUTURE TRAVEL TO GUAM

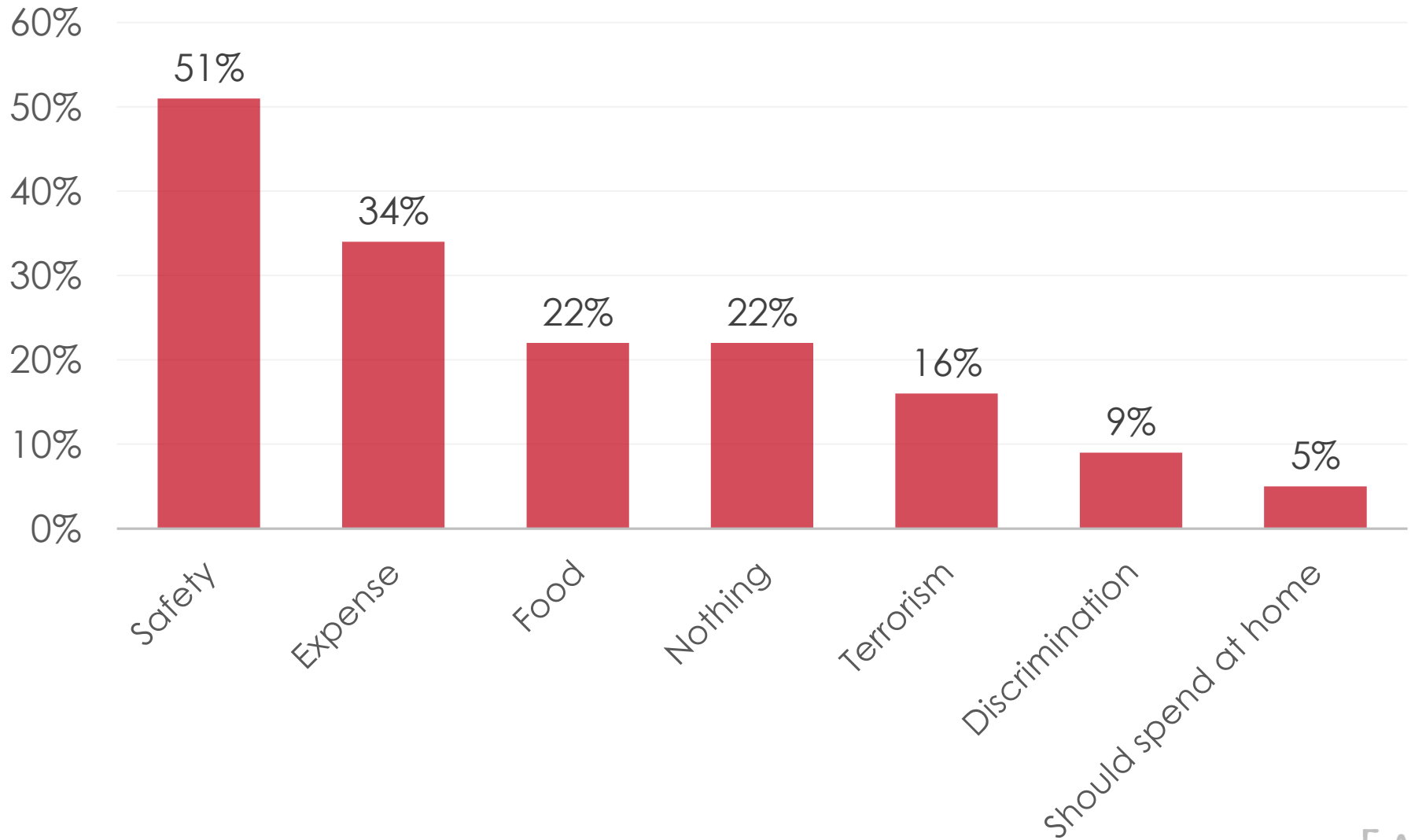
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



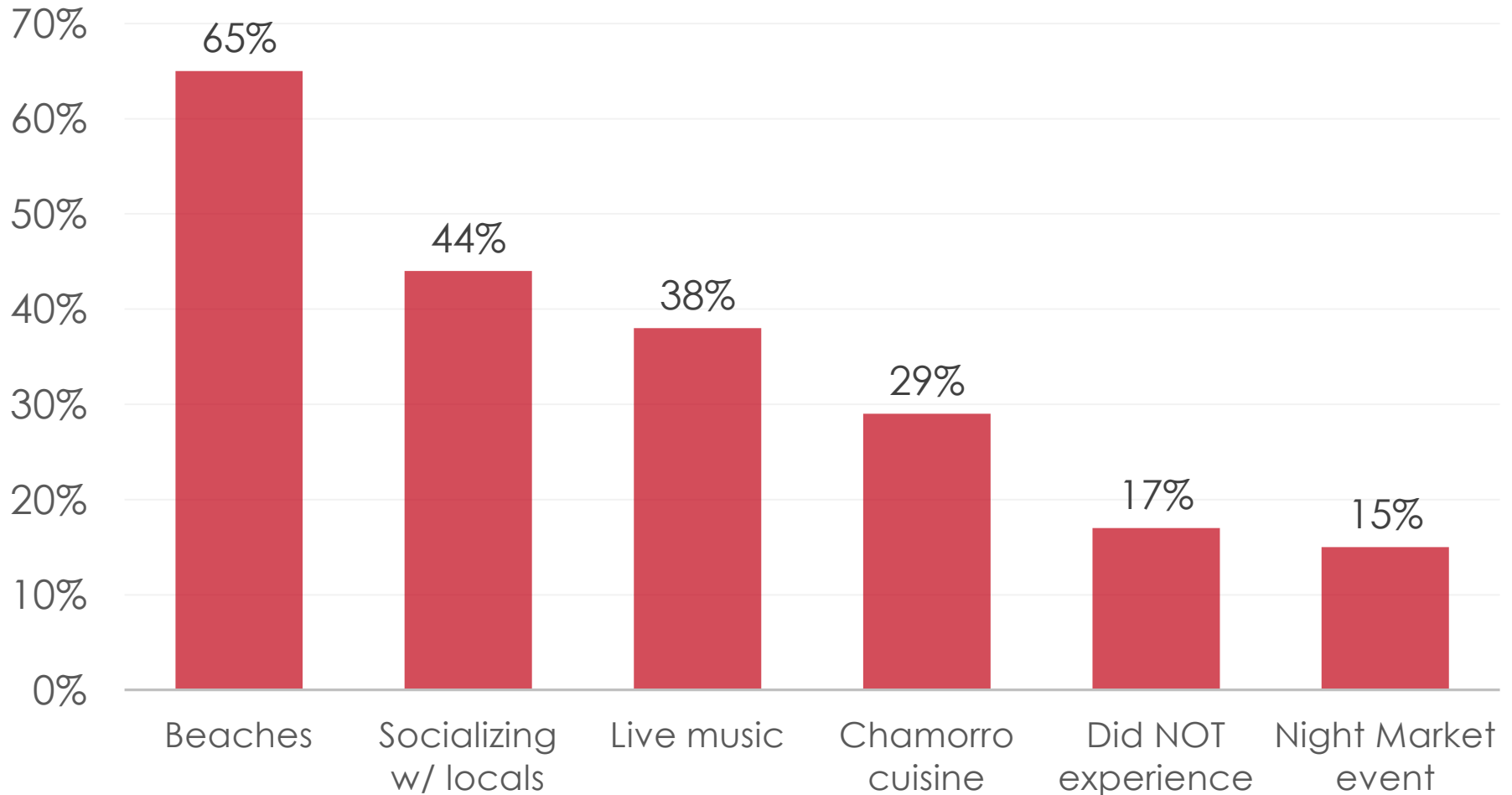
FUTURE TRAVEL CONCERNS



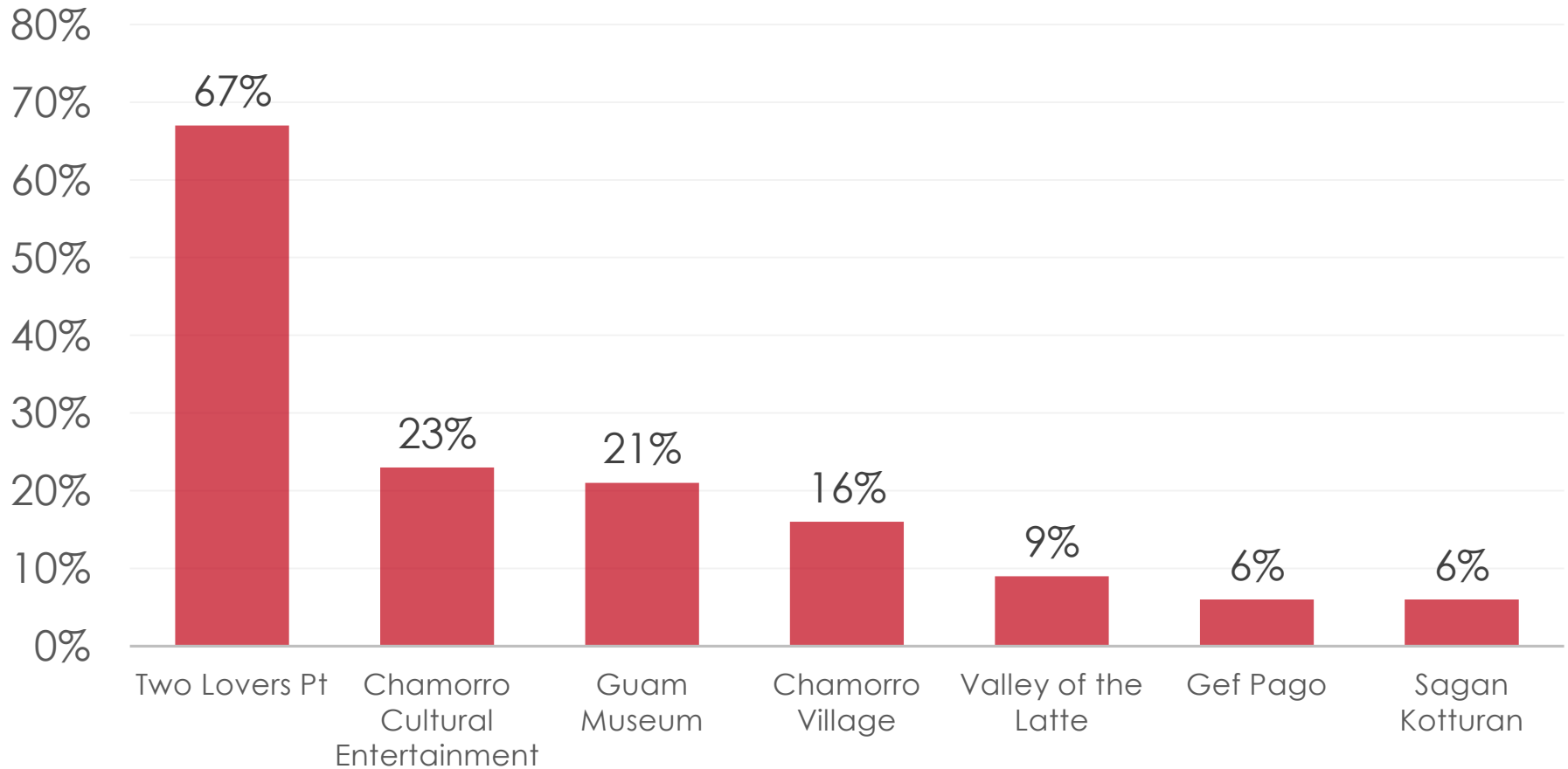
SECTION 7

GUAM CULTURE

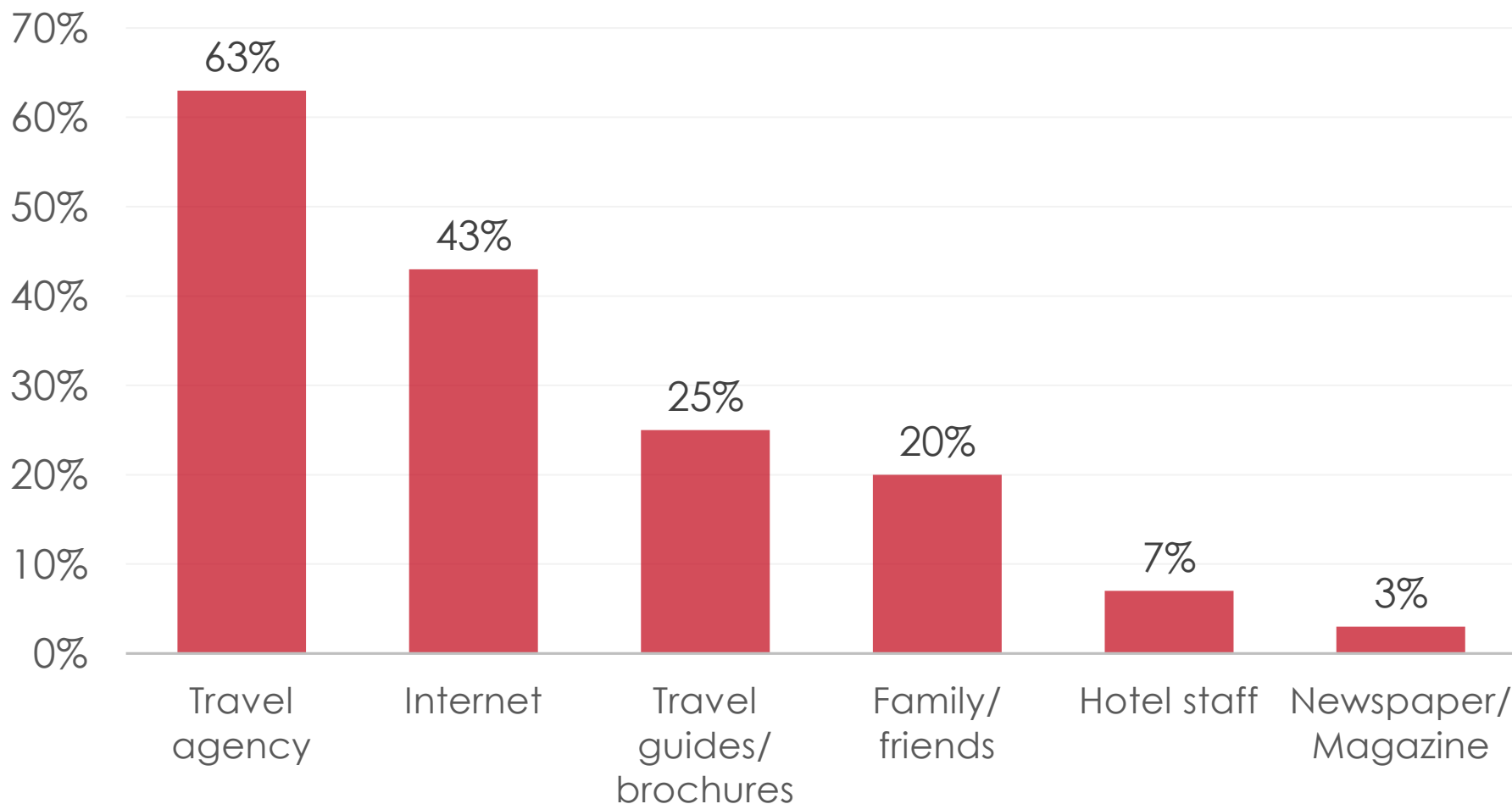
EXPERIENCED- CHAMORRO/ HAF A ADAI SPIRIT



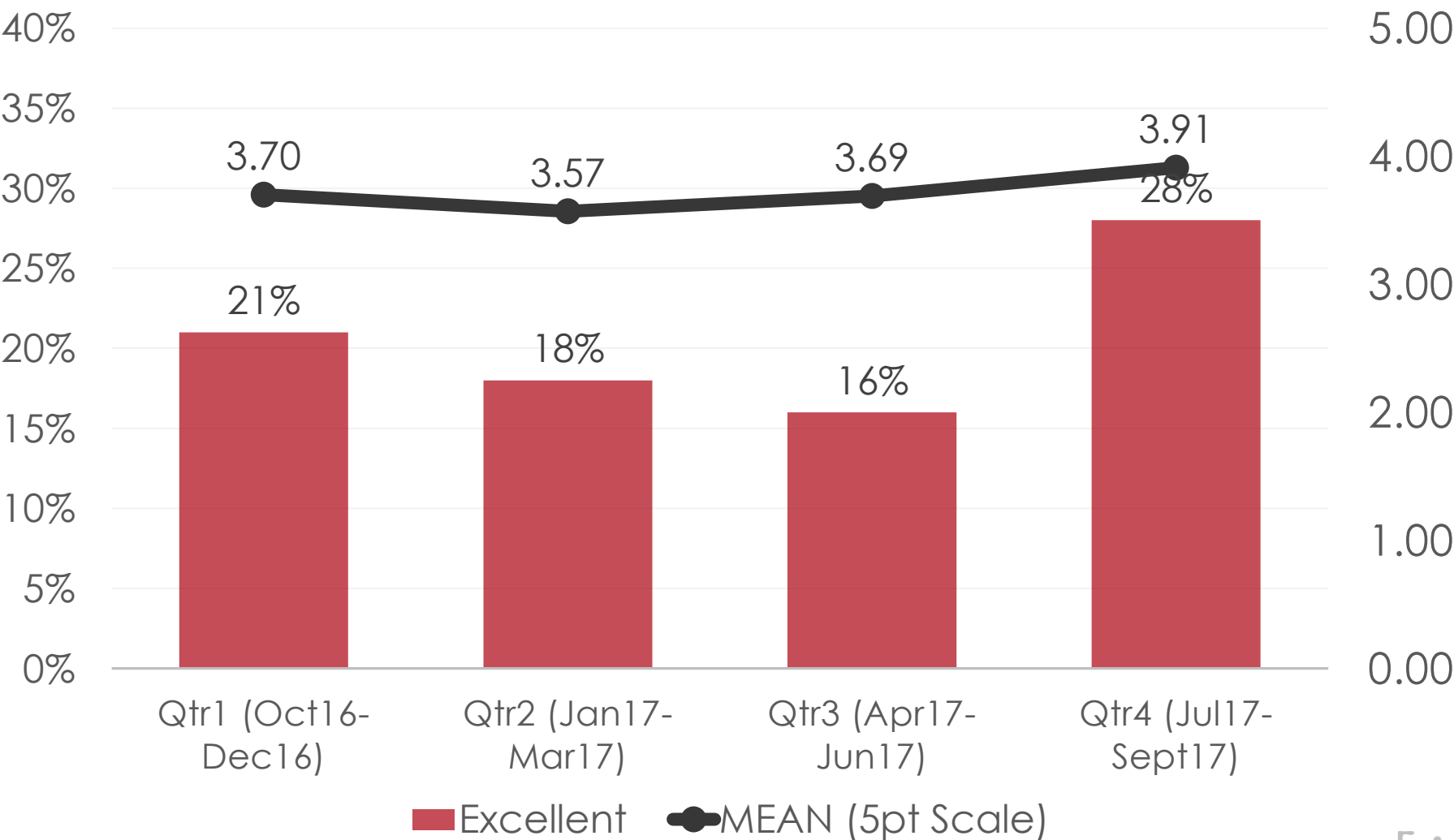
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



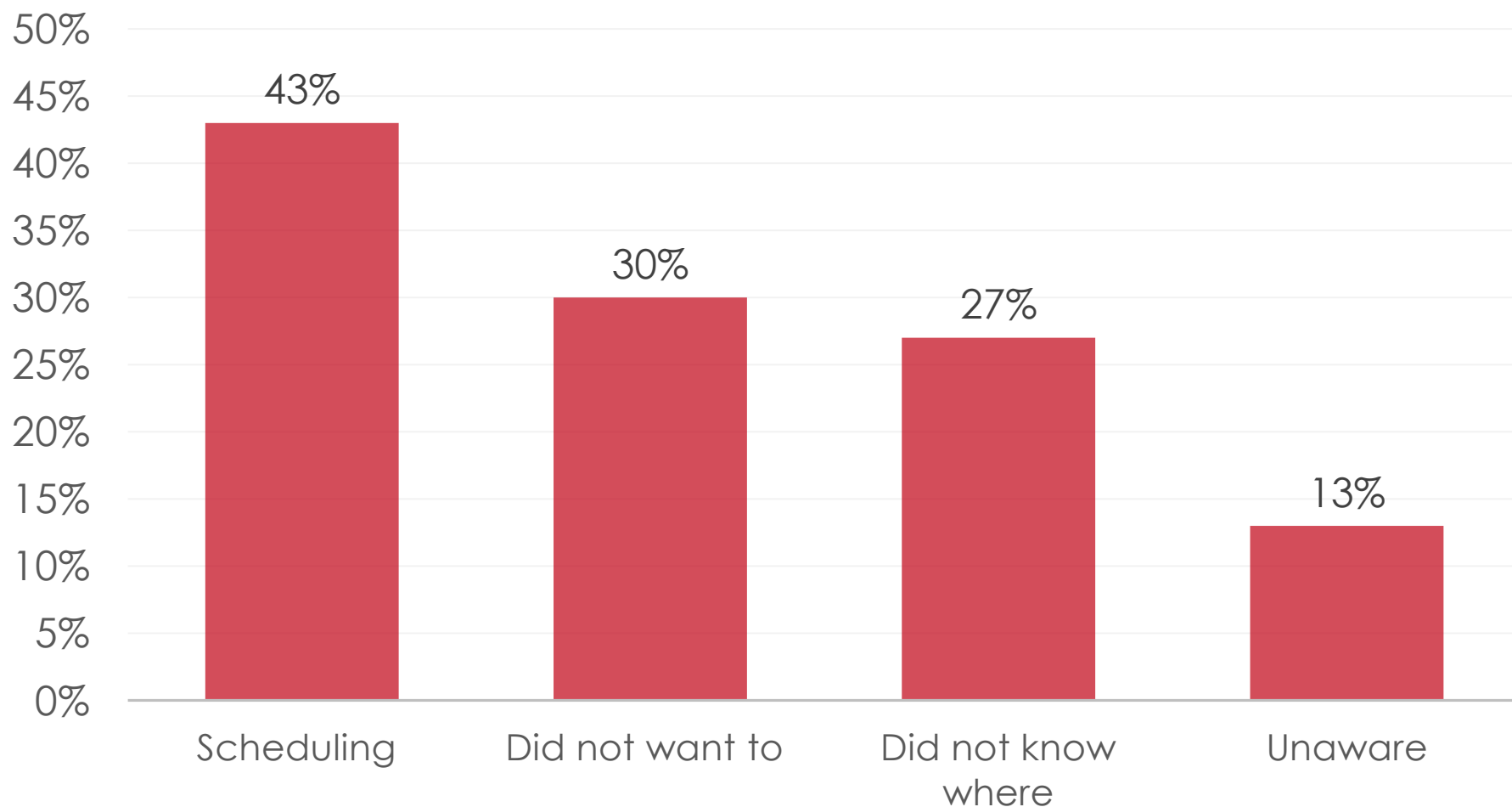
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



SATISFACTION- CULTURAL ACTIVITY/EVENTS

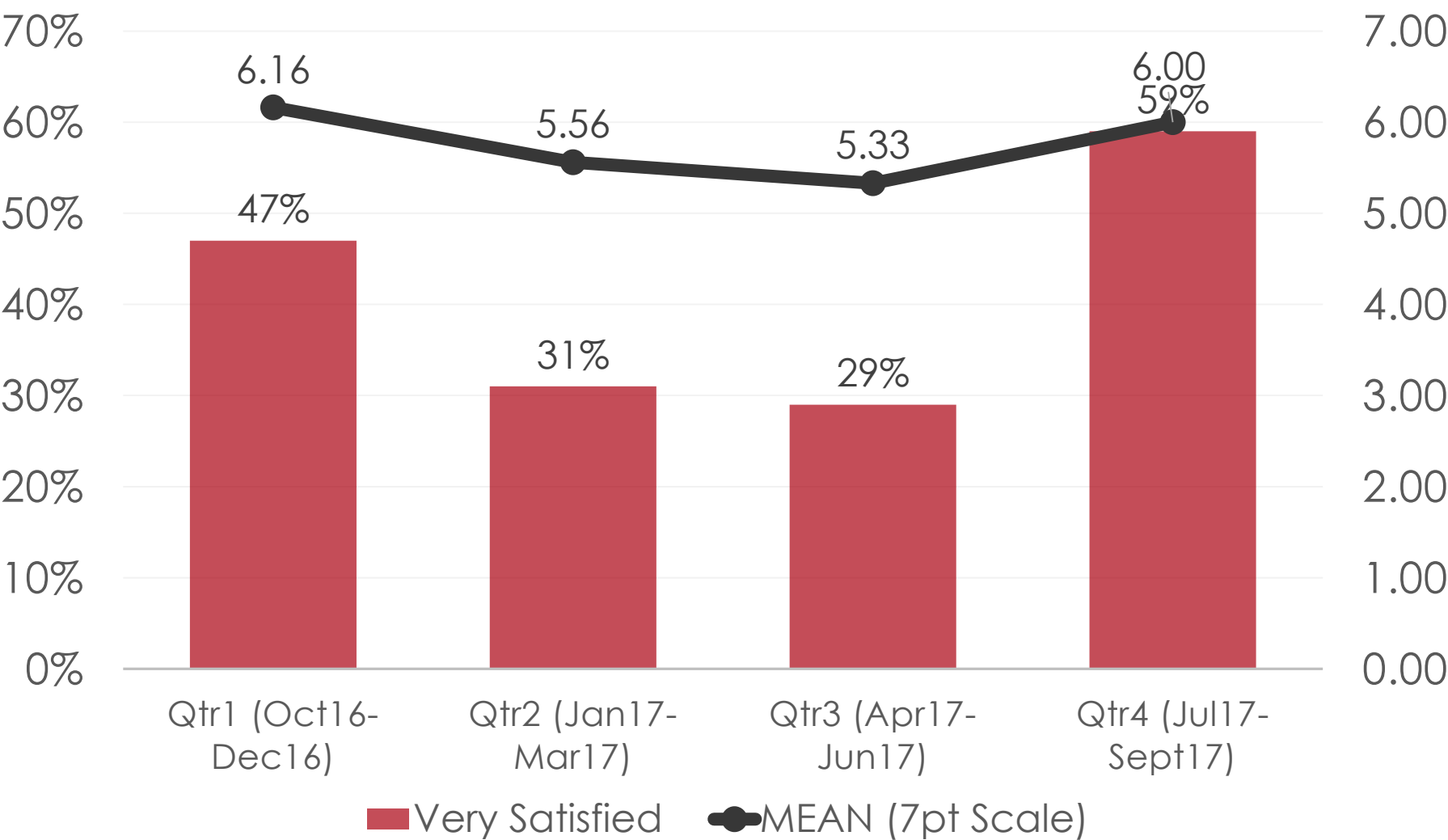


OBSTACLES- CULTURAL ACTIVITY/EVENTS

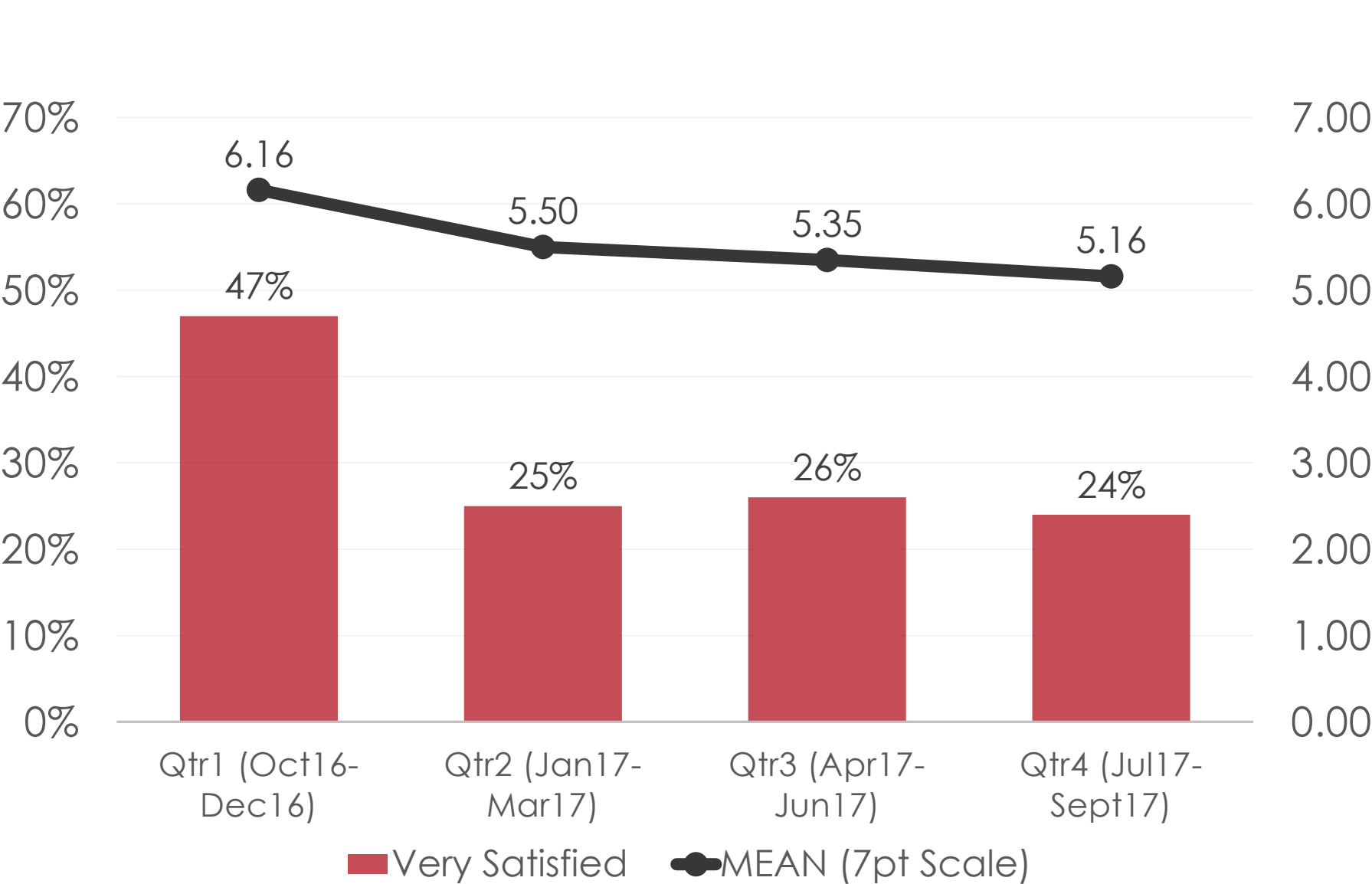


WEDDING SATISFACTION

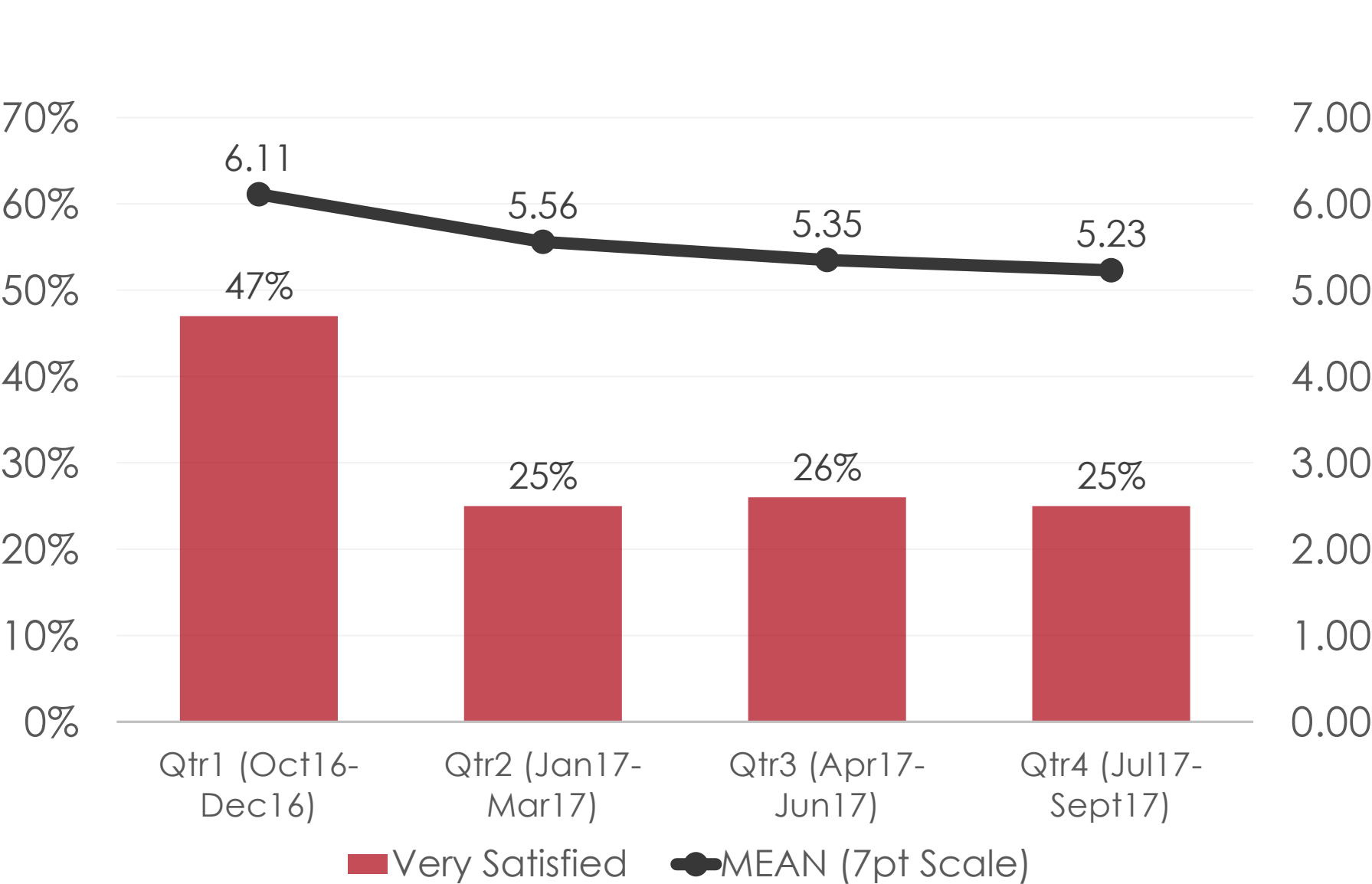
Wedding Facility



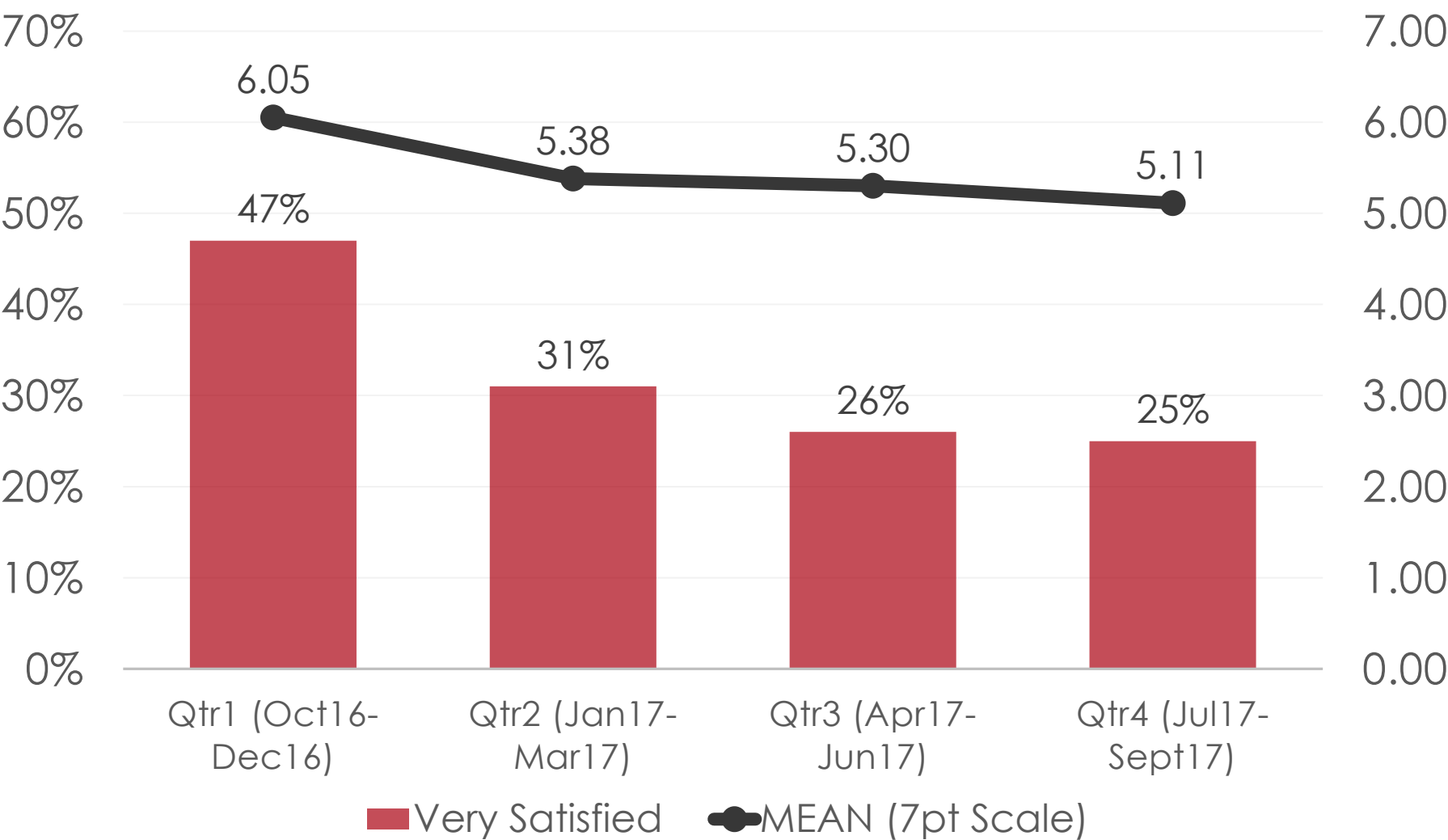
Wedding Facility Staff



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

Comparison of Drivers of Overall Satisfaction, 1st,2nd,3rd,4th Qtr. and Overall 1-4 Qtr. 2017					
	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr.	Combined 1-4 Qtr. 2017
Drivers:	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks			2		5
Ease of getting around					
Safety walking around at night		5			
Quality of daytime tours					1
Variety of daytime tours		3			
Quality of nighttime tours			4		
Variety of nighttime tours					
Quality of shopping		4		4	7
Variety of shopping	3				
Price of things on Guam				2	4
Quality of hotel accommodations			3	3	6
Quality/cleanliness of air, sky		1			3
Quality/cleanliness of parks					
Quality of landscape in Tumon			5		
Quality of landscape in Guam				1	
Quality of ground handler	1	2	1		2
Quality/cleanliness of transportation vehicles	2				
% of Per Person On Island Expenditures Accounted For	51.7%	63.5%	70.7%	51.6%	58.5%
NOTE: Only significant drivers are included.					

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by four significant factors in the 4th Quarter 2017 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Price of things on Guam,**
 - **Quality of hotel accommodations, and**
 - **Quality of shopping.**
- With all four factors the overall r^2 is .516 meaning that **51.6% of overall satisfaction is accounted for by these factors.**

Drivers – On-Isle Expenditures

Comparison of Drivers of Per Person On-Island Expenditures, 1st,2nd,3rd,4th Qtrs. 2017, and Overall 1-4th Qtrs. 2017					
	1st Qtr.	2nd Qtr	3rd Qtr	4th Qtr.	Combined 1-4 Qtr. 2017
Drivers:	rank	rank	rank	rank	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%	0.0%	0.0%	0.0%	0.0%
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 4th Quarter 2017 period.