

# Guam Visitors Bureau

## Taiwan Visitor Tracker Exit Profile

### FY2018 DATA AGGREGATION

Prepared by: Anthology Research

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#instaGuam



# 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 **629** 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 **629** is +/- 3.91 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 +/- 3.91 percentage points.

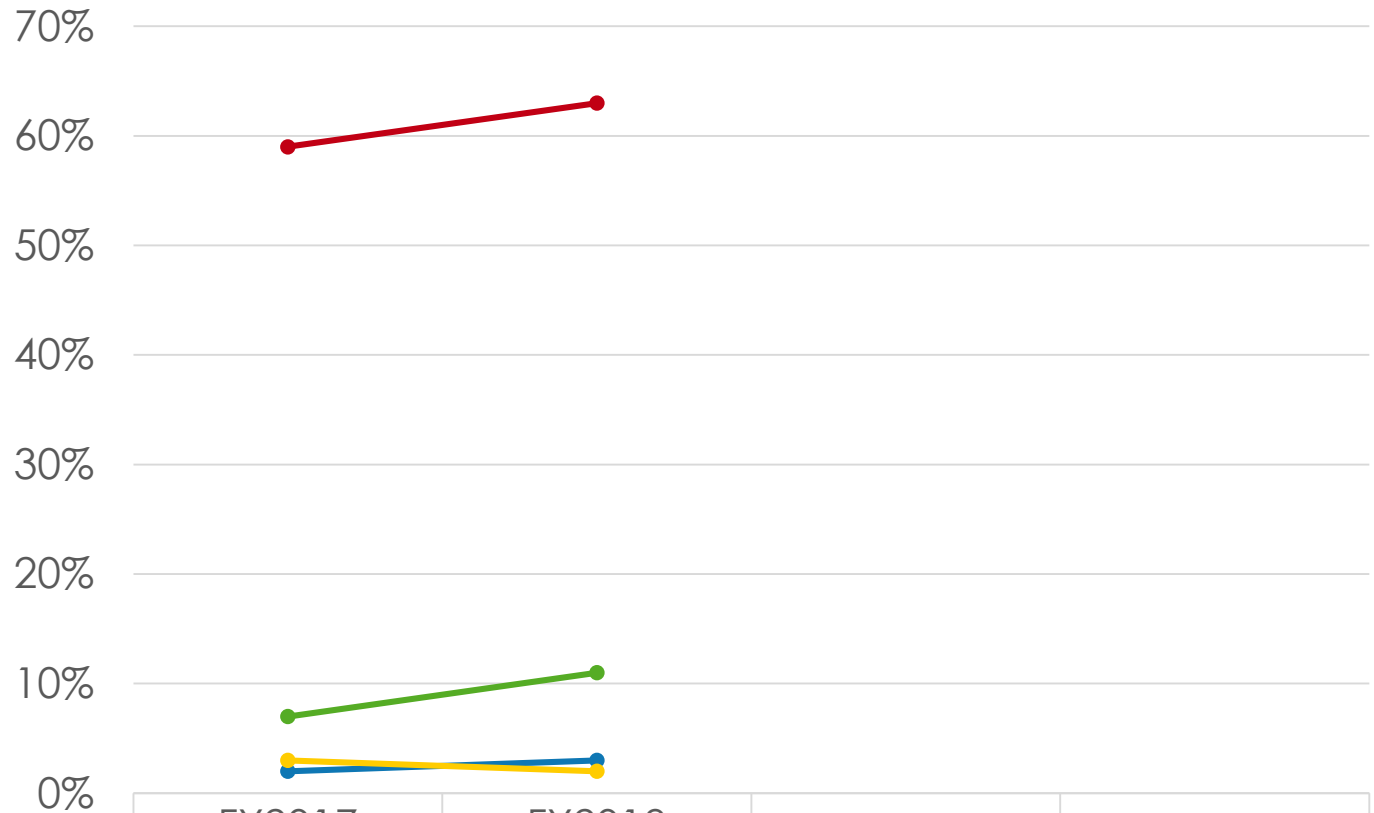
# Objectives

- 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.

# SECTION 1

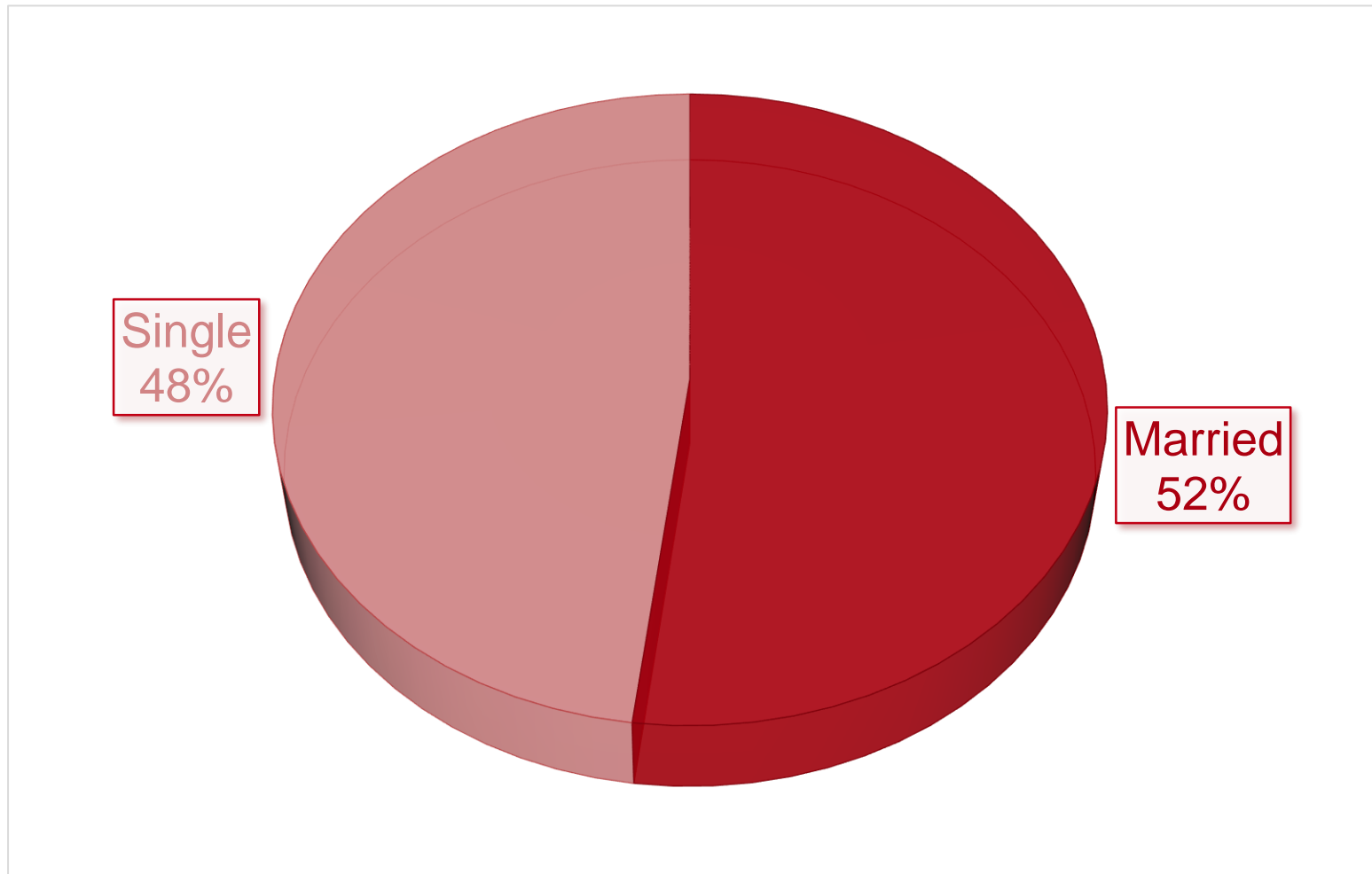
# PROFILE OF RESPONDENTS

# Key Segments - Taiwan

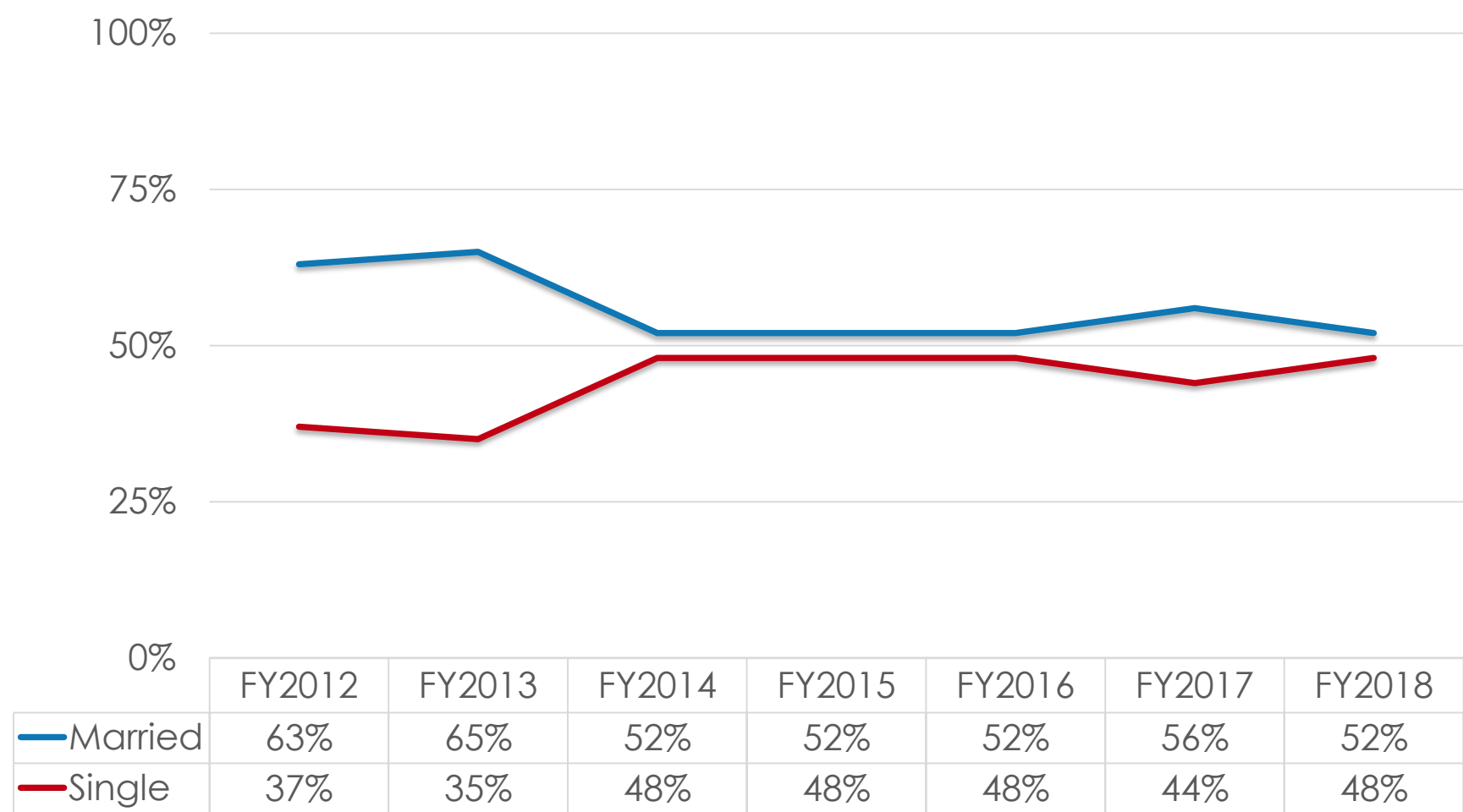


● MICE	FY2017	FY2018		
● Sports/ Adventure	2%	3%		
● Honeymoon	59%	63%		
● Wedding	7%	11%		
	3%	2%		

# Marital Status

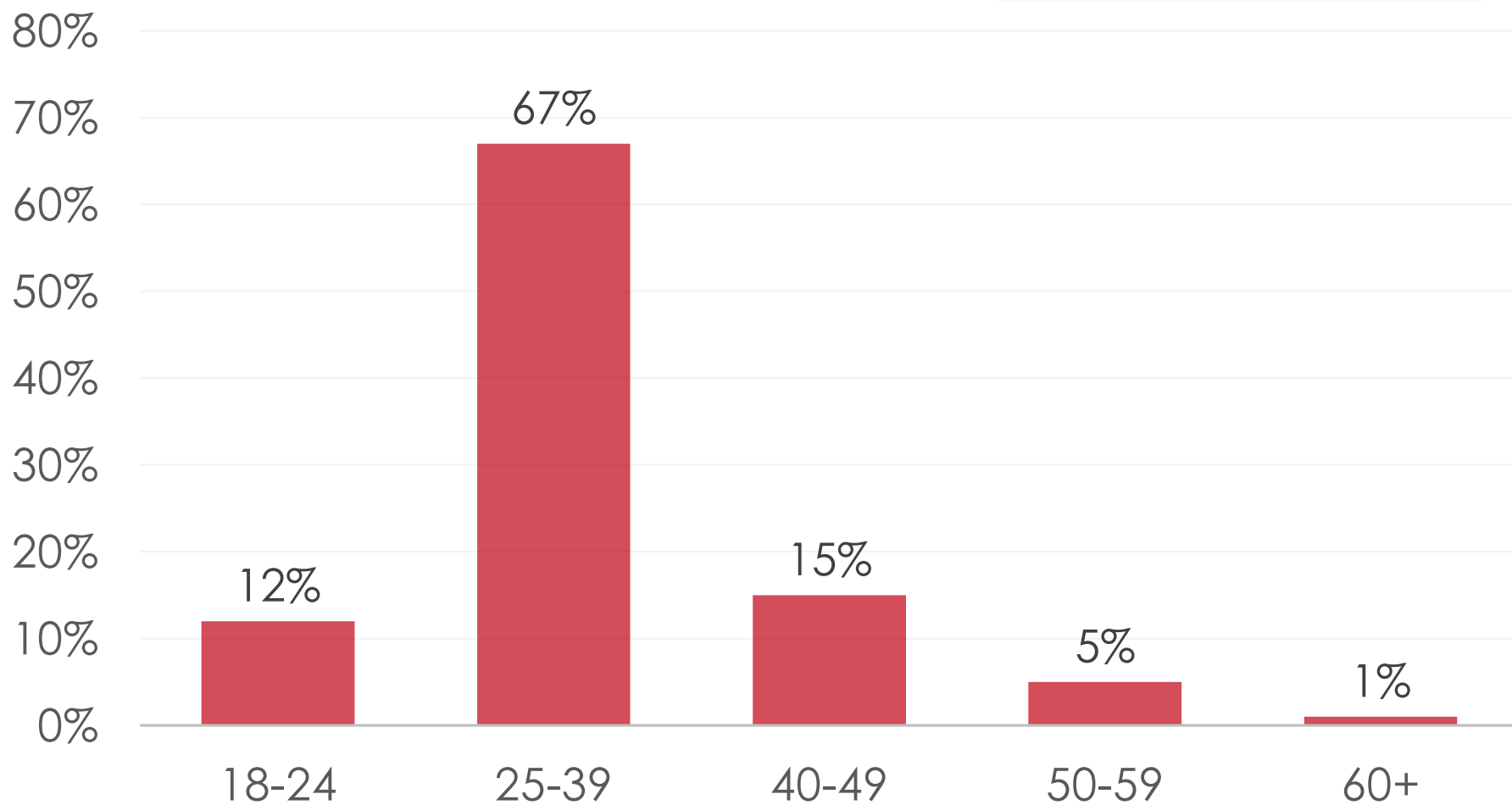


# Marital status – Tracking



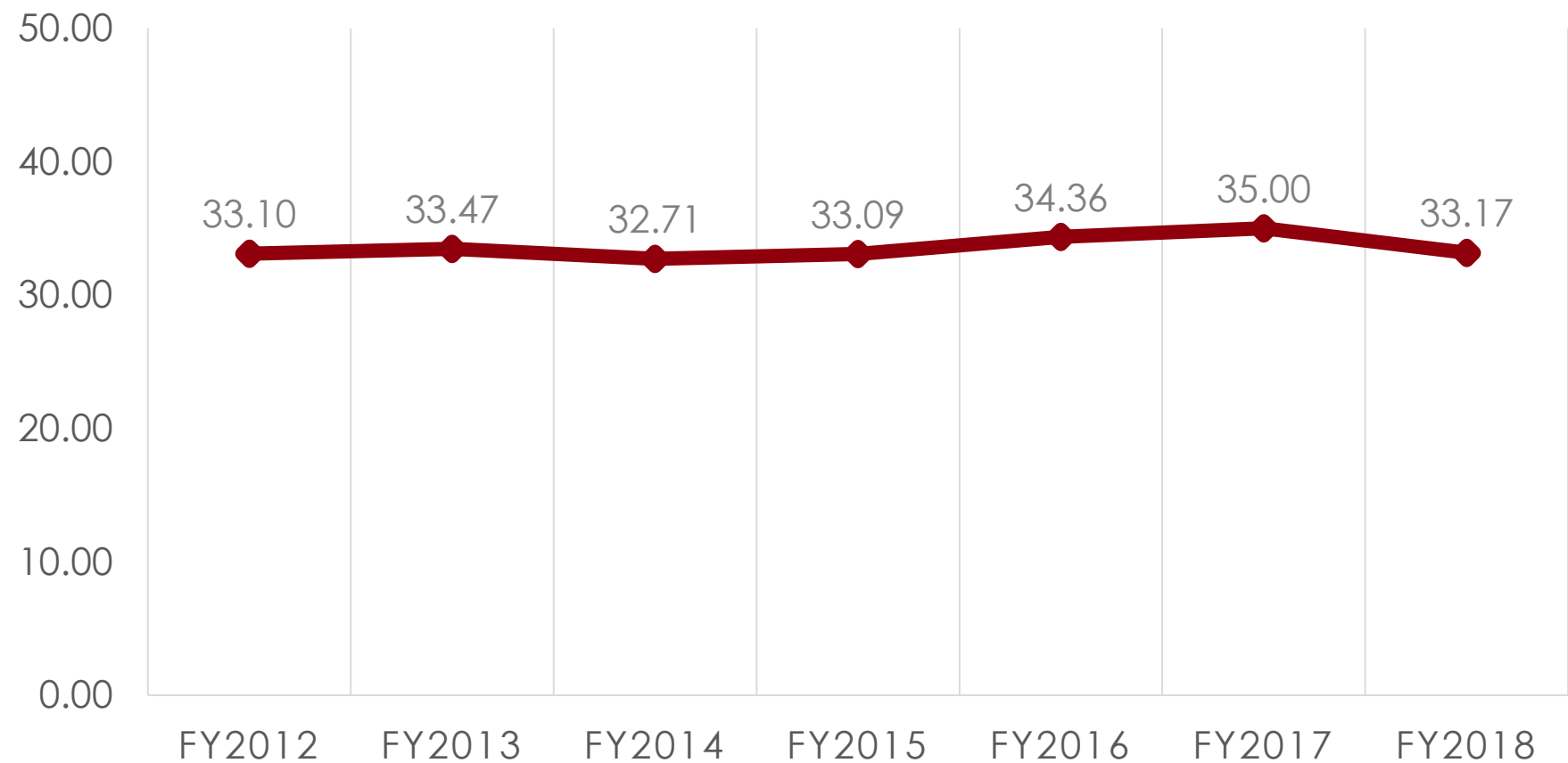
# Age

MEAN = 33.17  
MEDIAN = 31

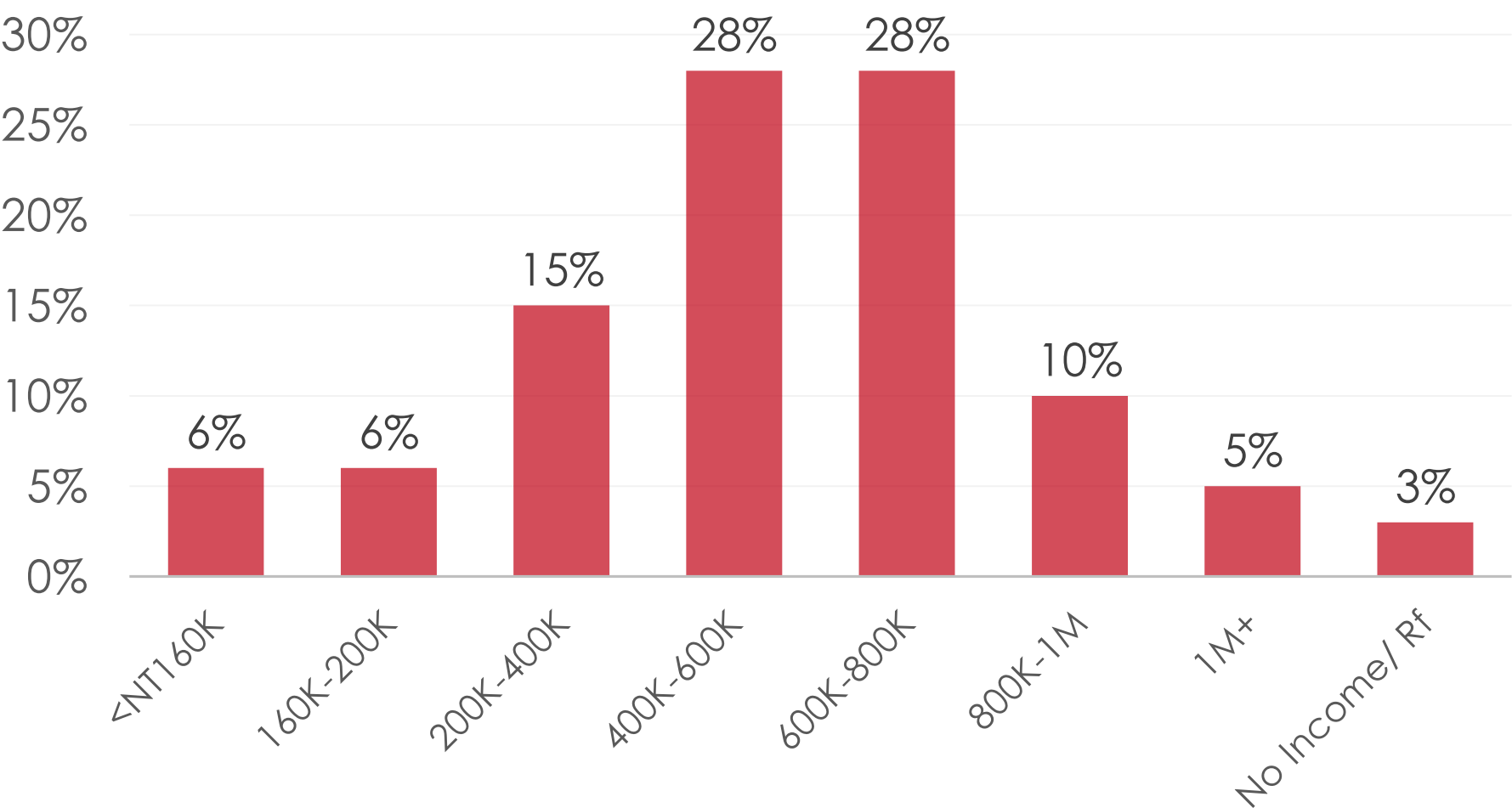




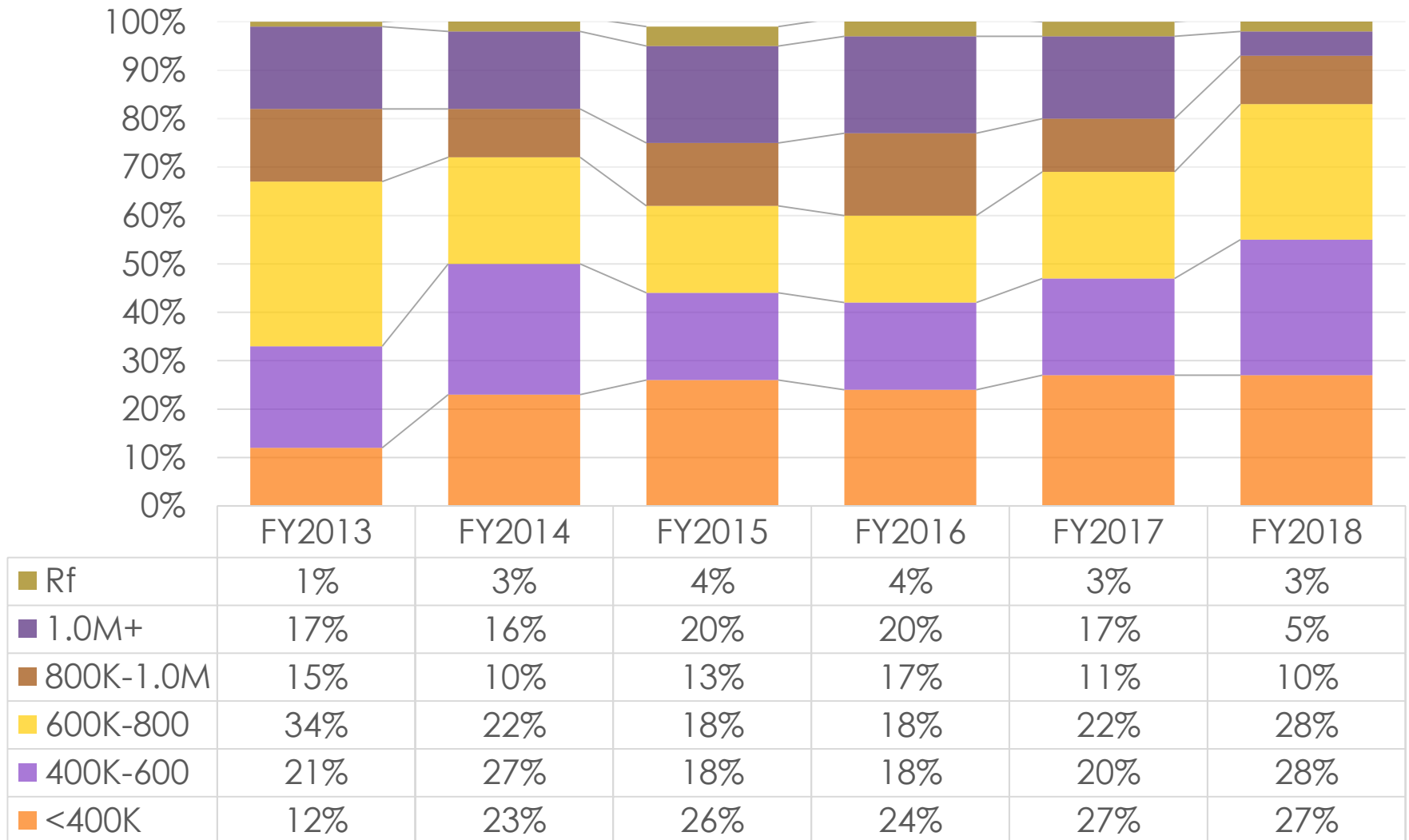
# Age – Tracking



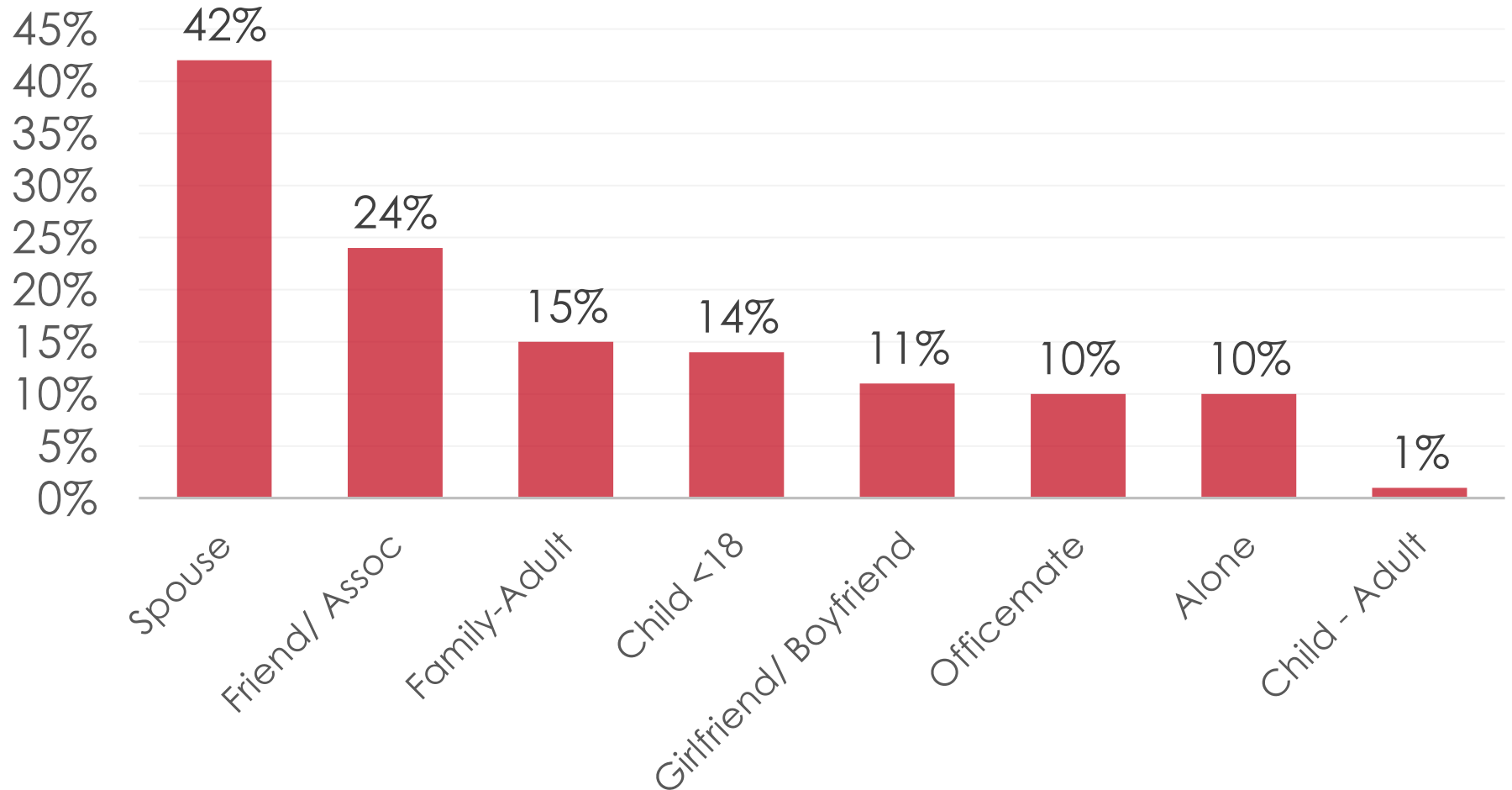
# Annual Household Income



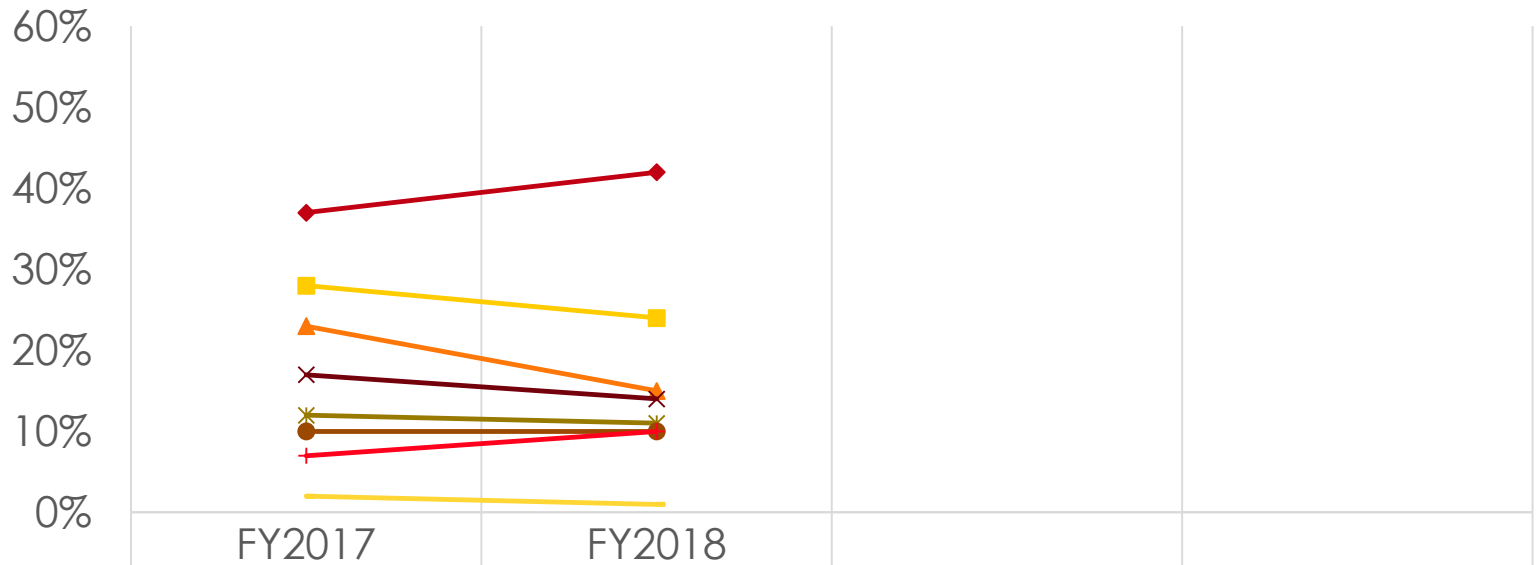
# Annual Household Income - Tracking



# Travel Party



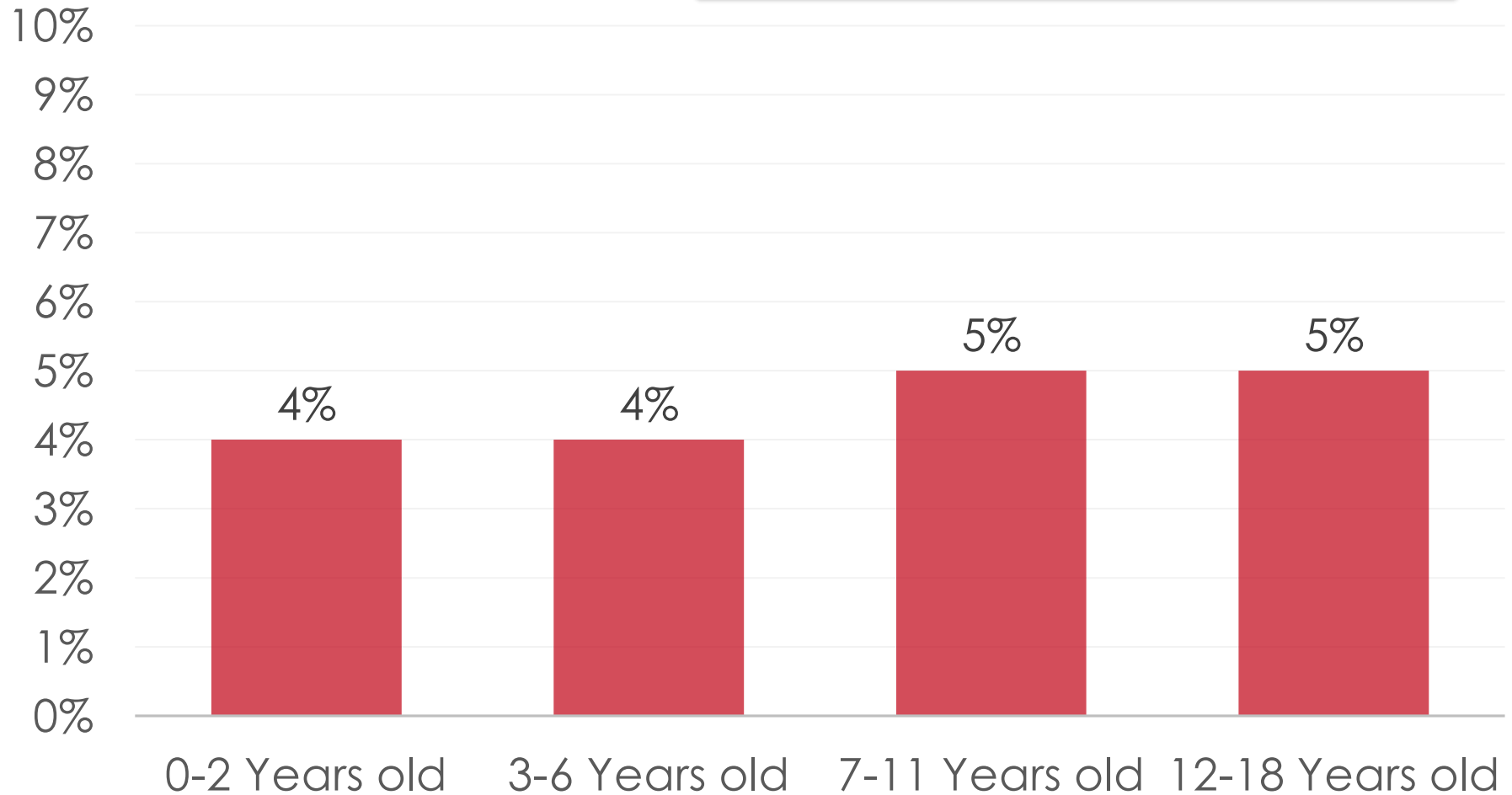
# Travel Party



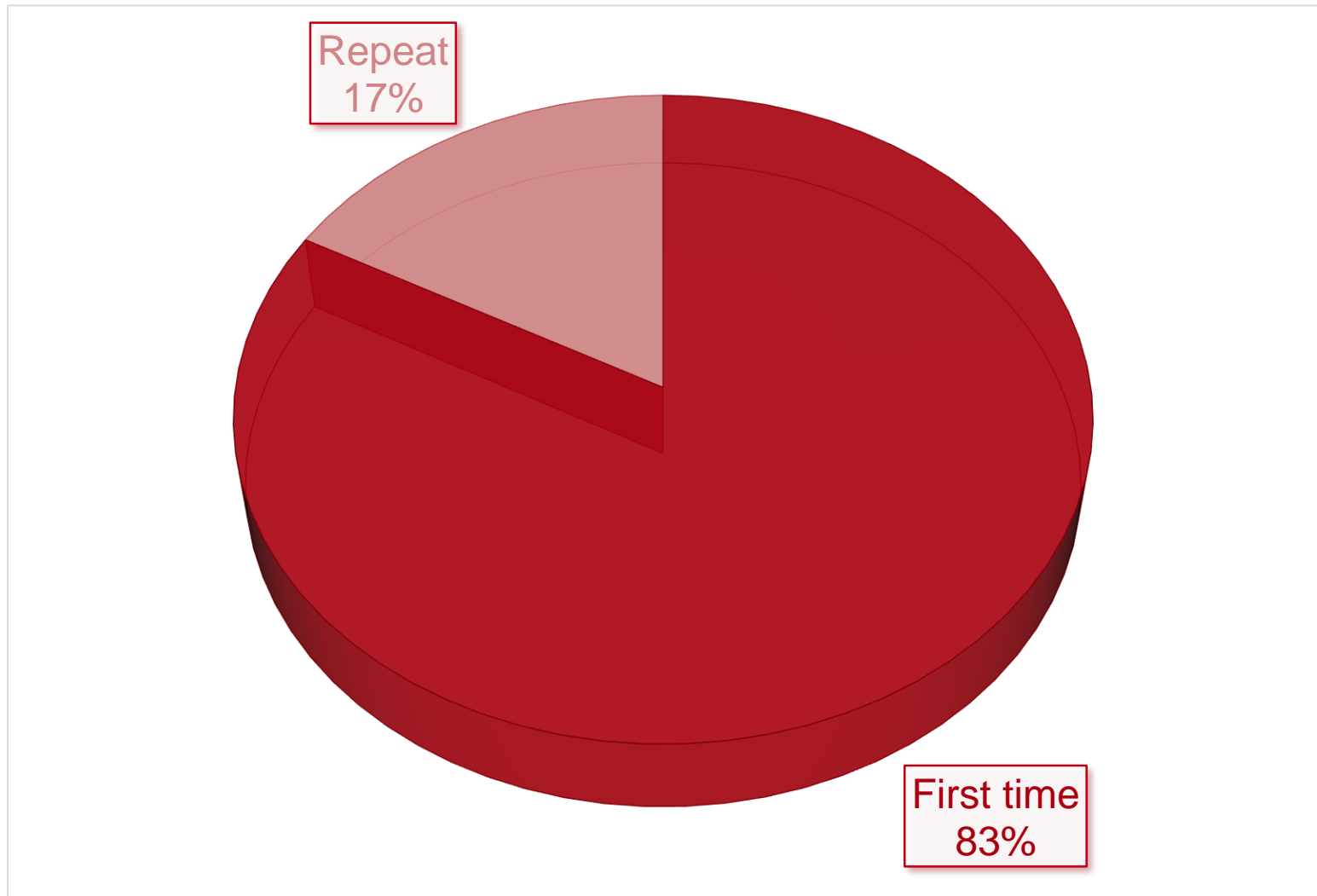
◆ Spouse	37%	42%		
■ Friend/ Assoc	28%	24%		
▲ Family- Adult	23%	15%		
✕ Child <18	17%	14%		
* BF/GF	12%	11%		
● Office	10%	10%		
+ Alone	7%	10%		
— Child- Adult	2%	1%		

# Travel Party - Children

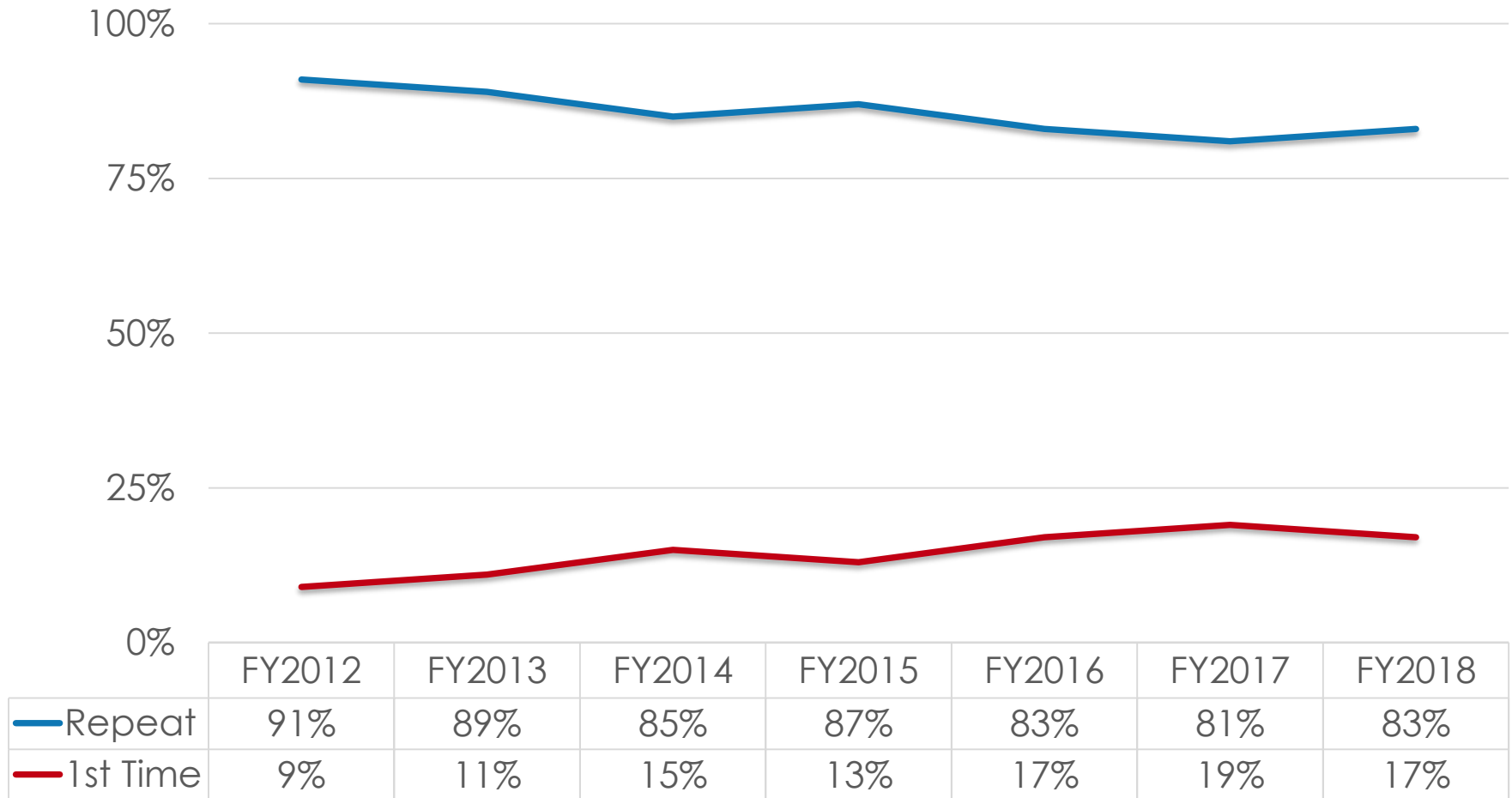
14% TRAVELING WITH A CHILD



# Trips to Guam



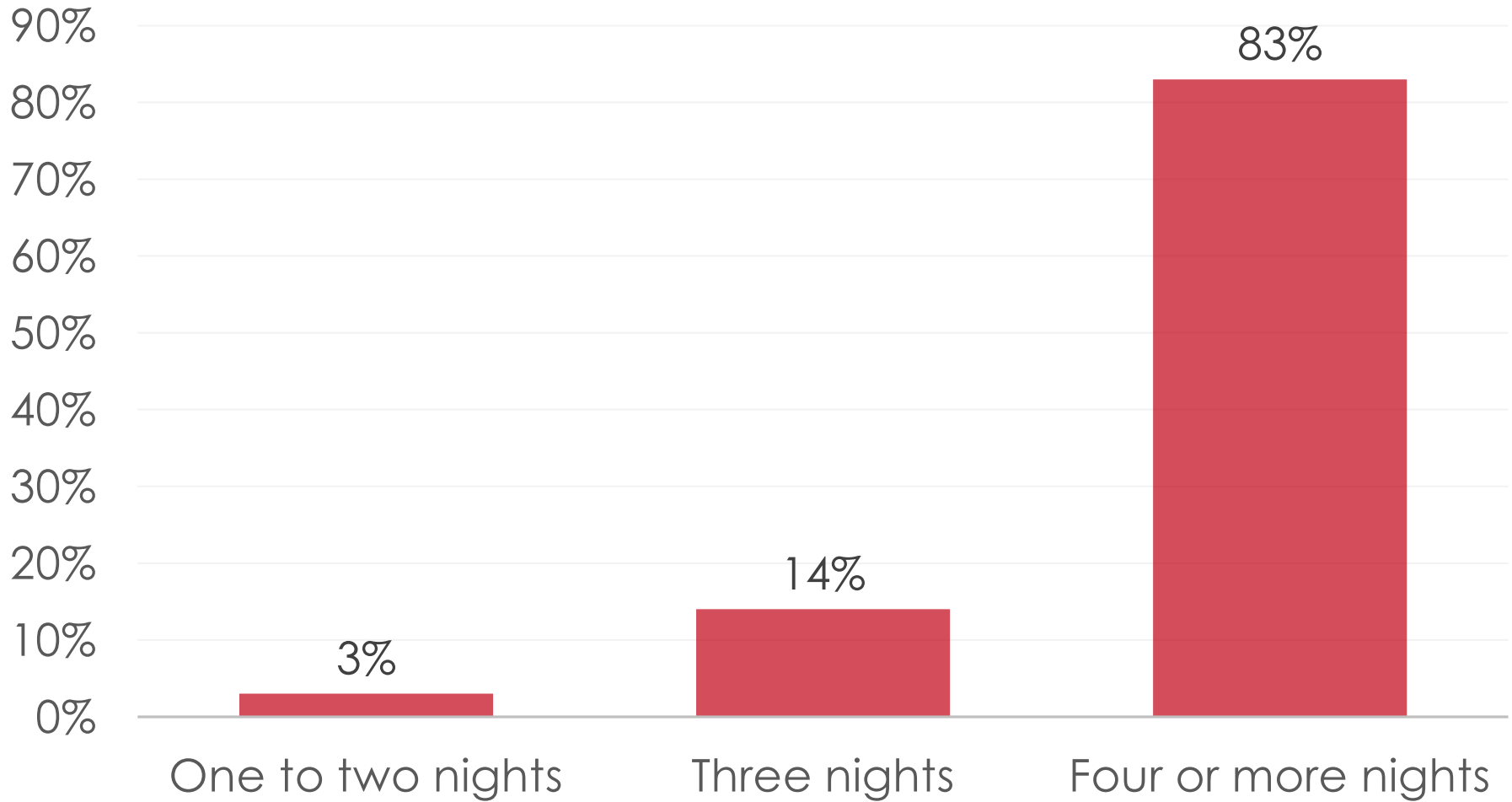
# Trips to Guam – Tracking



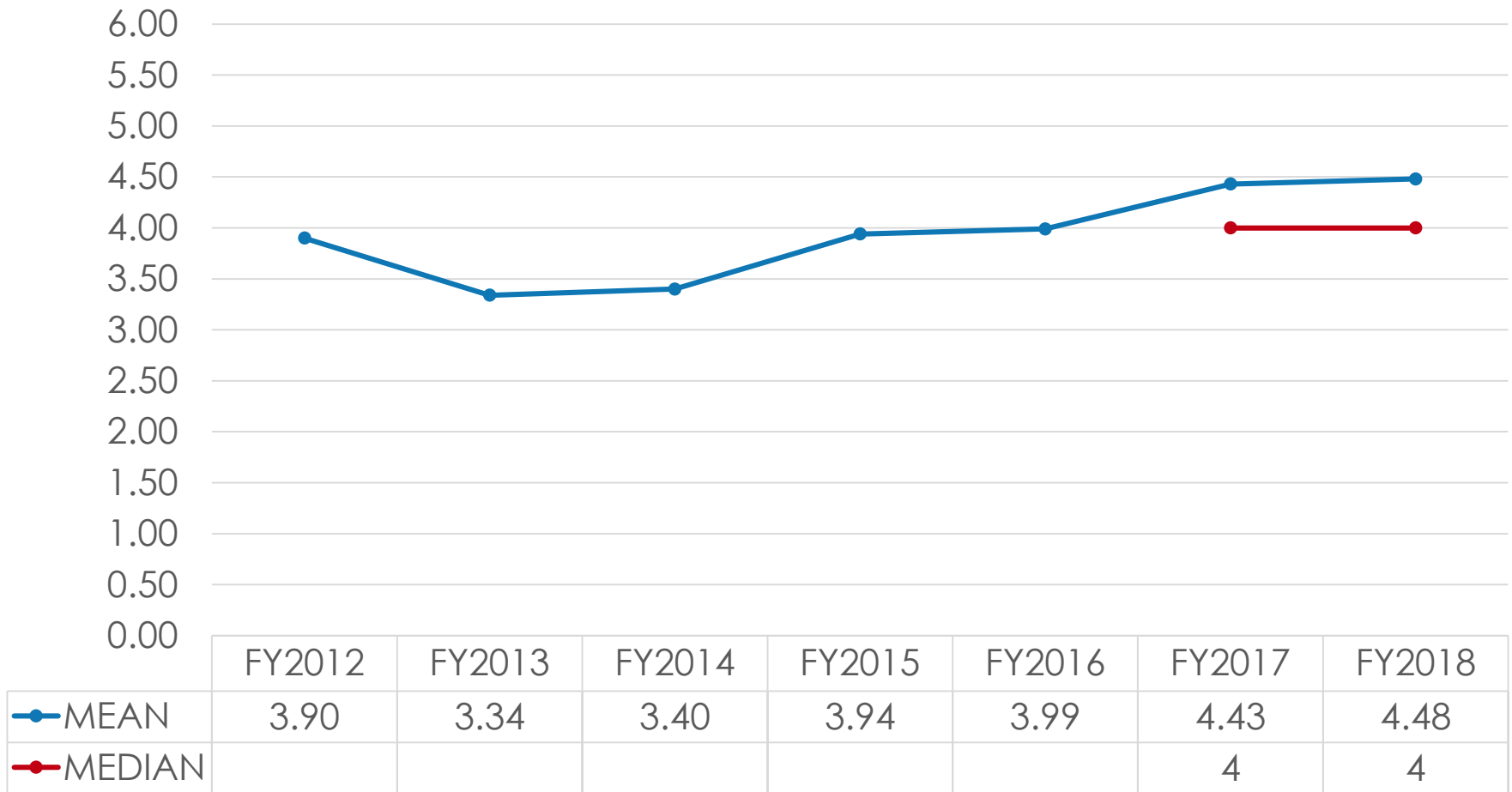


# Length of Stay

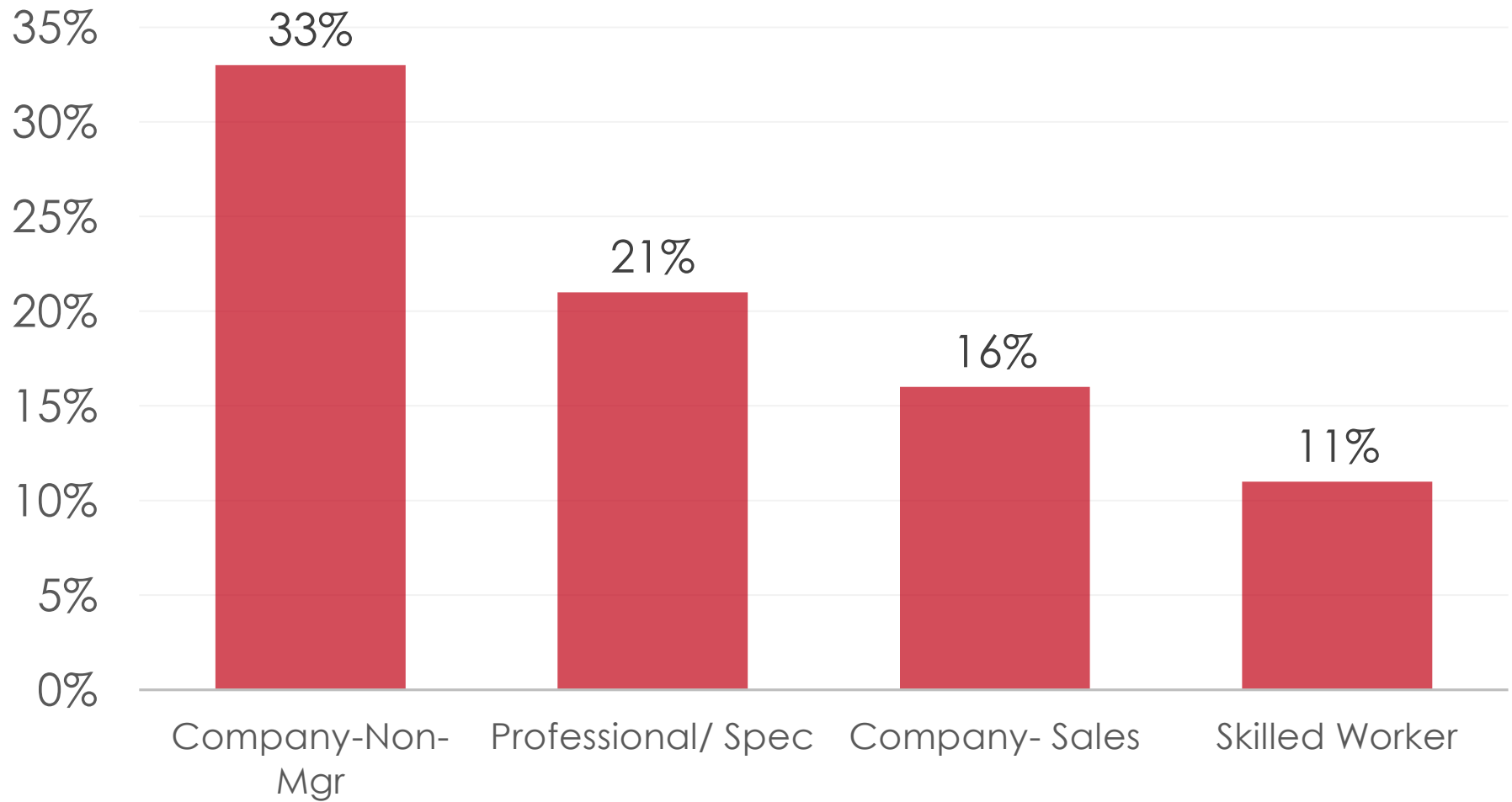
MEAN NUMBER OF NIGHTS = 4.48  
MEDIAN NUMBER OF NIGHTS = 4



# Length of Stay – Tracking



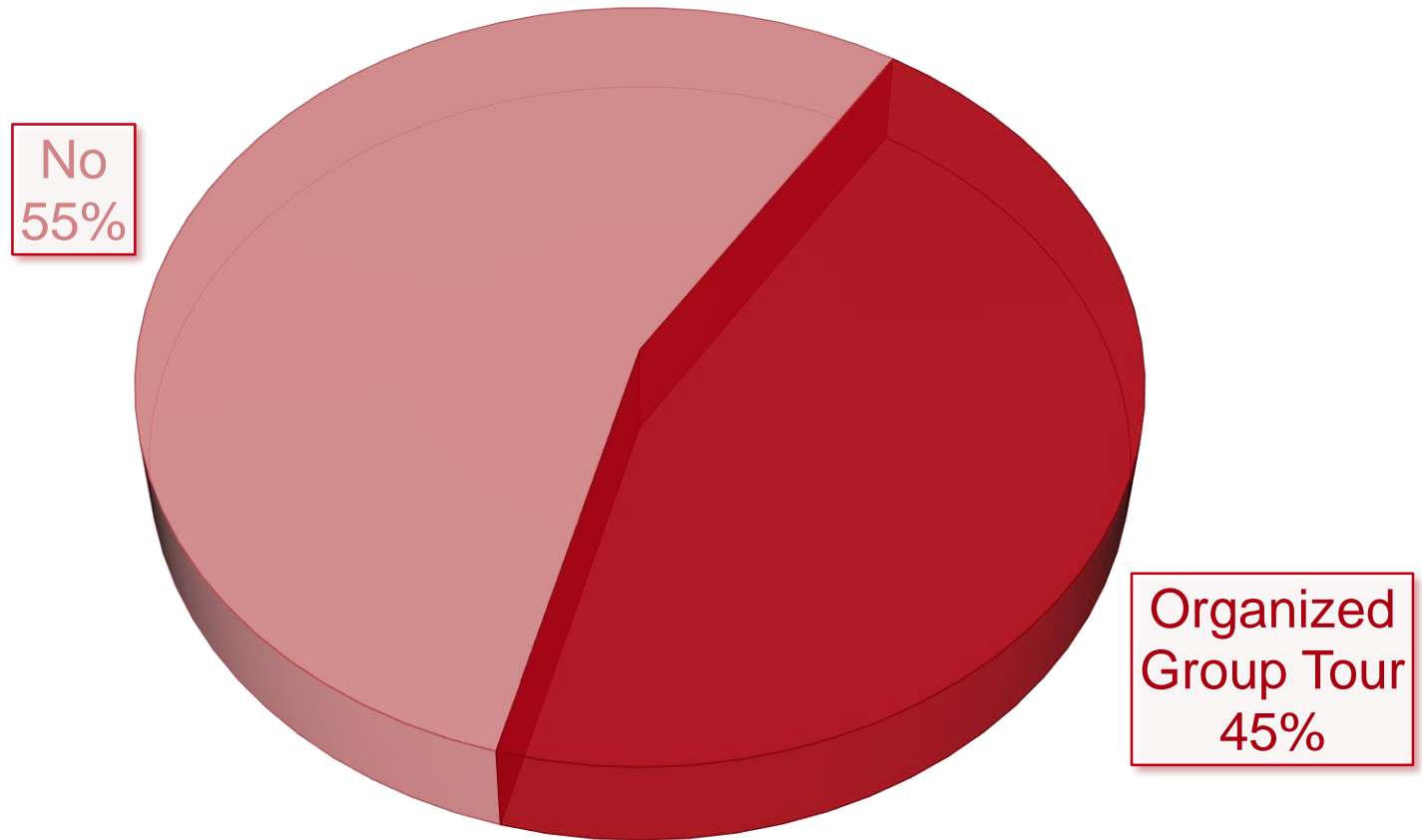
# Occupation – Top Responses (10%+)



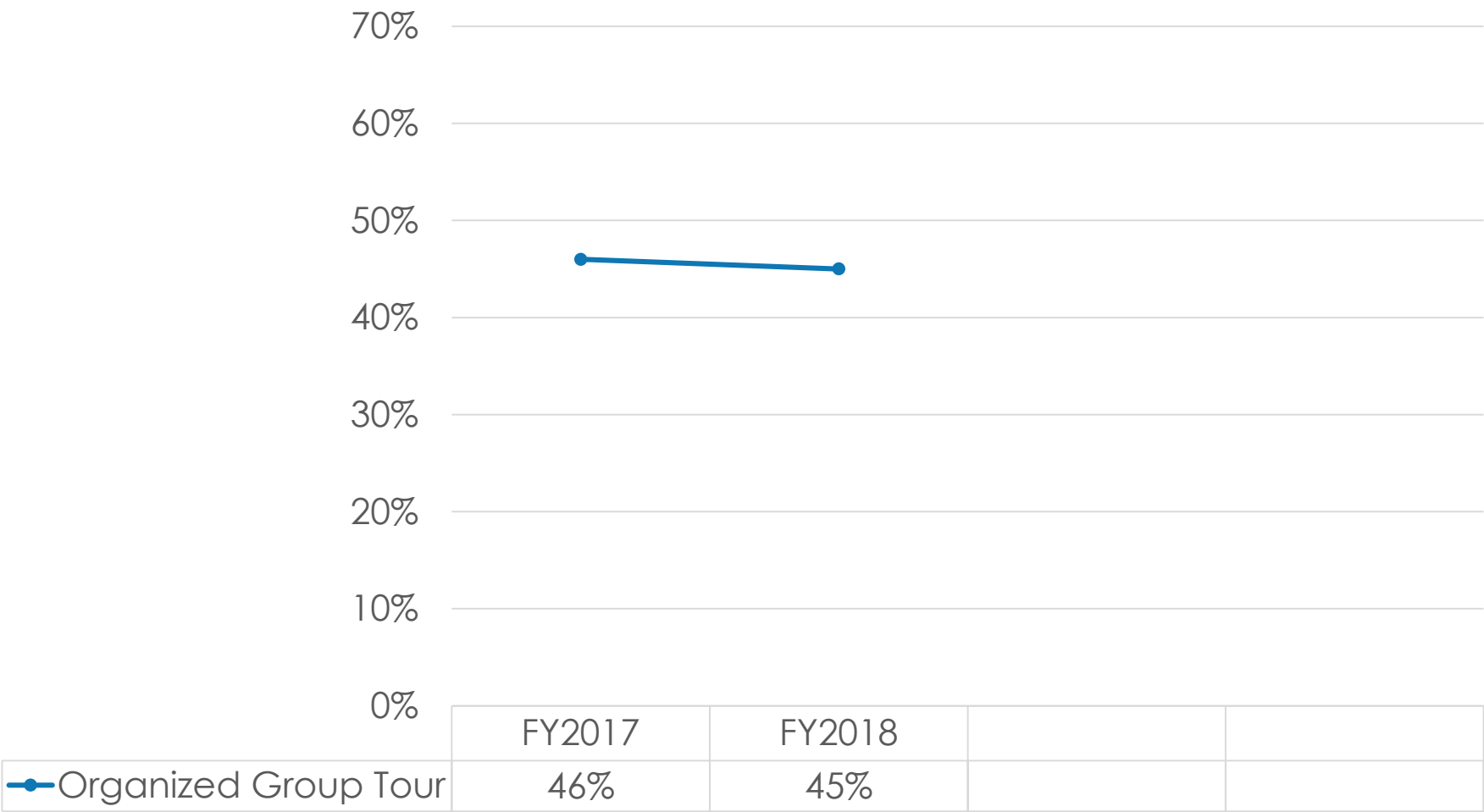
# SECTION 2

# TRAVEL PLANNING

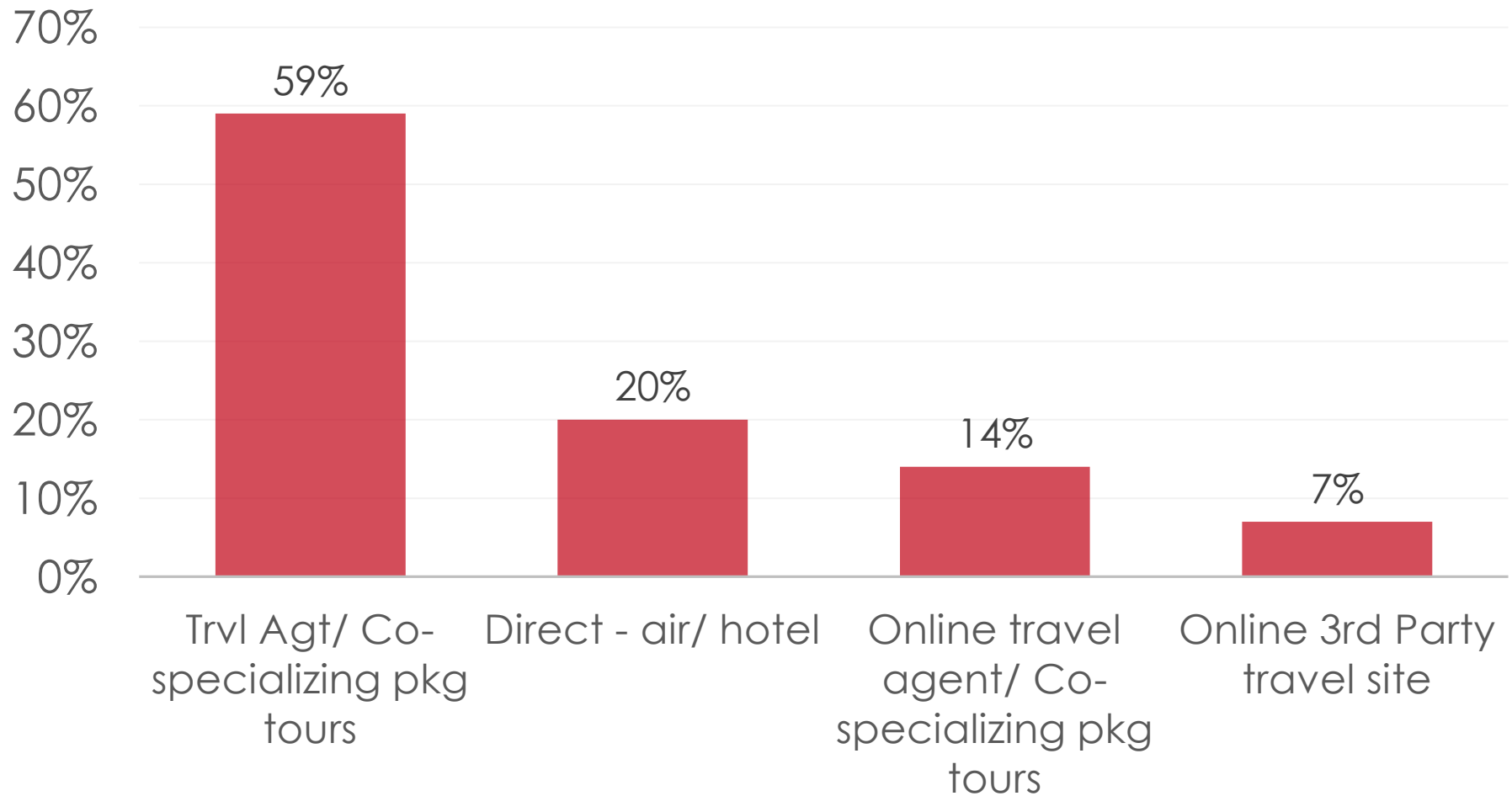
# Organized Group Tour



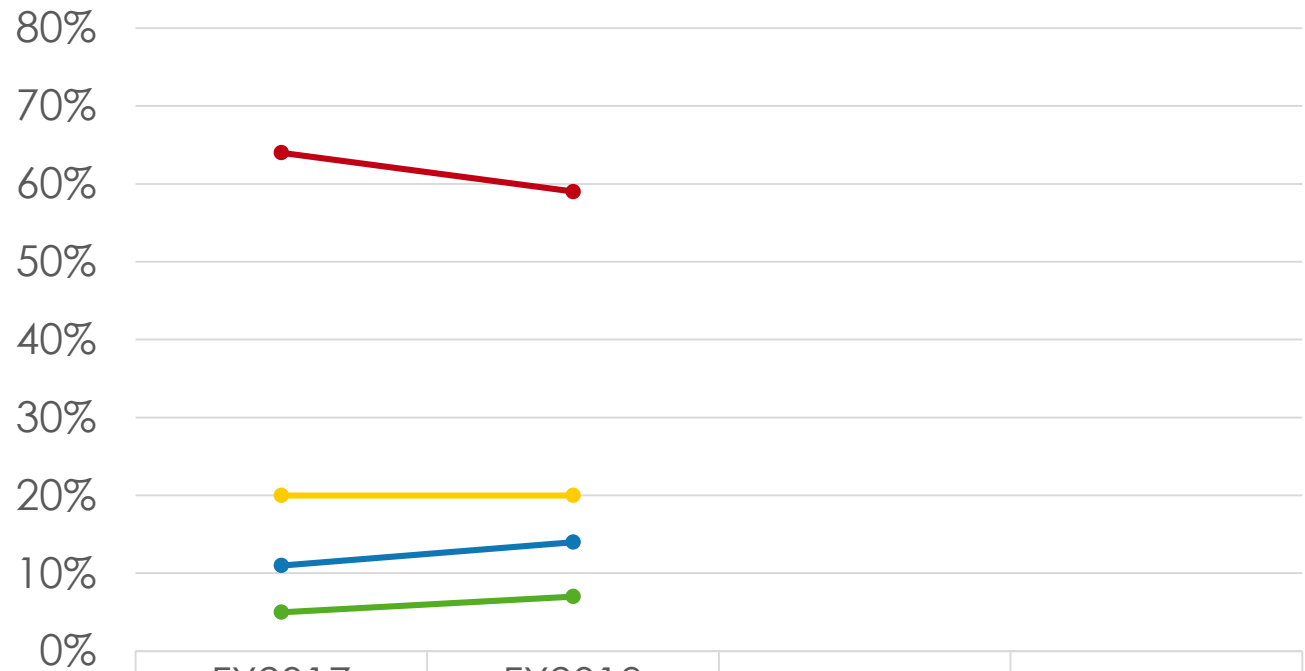
# Organized Group Tour



# TRAVEL ARRANGEMENT - SOURCES



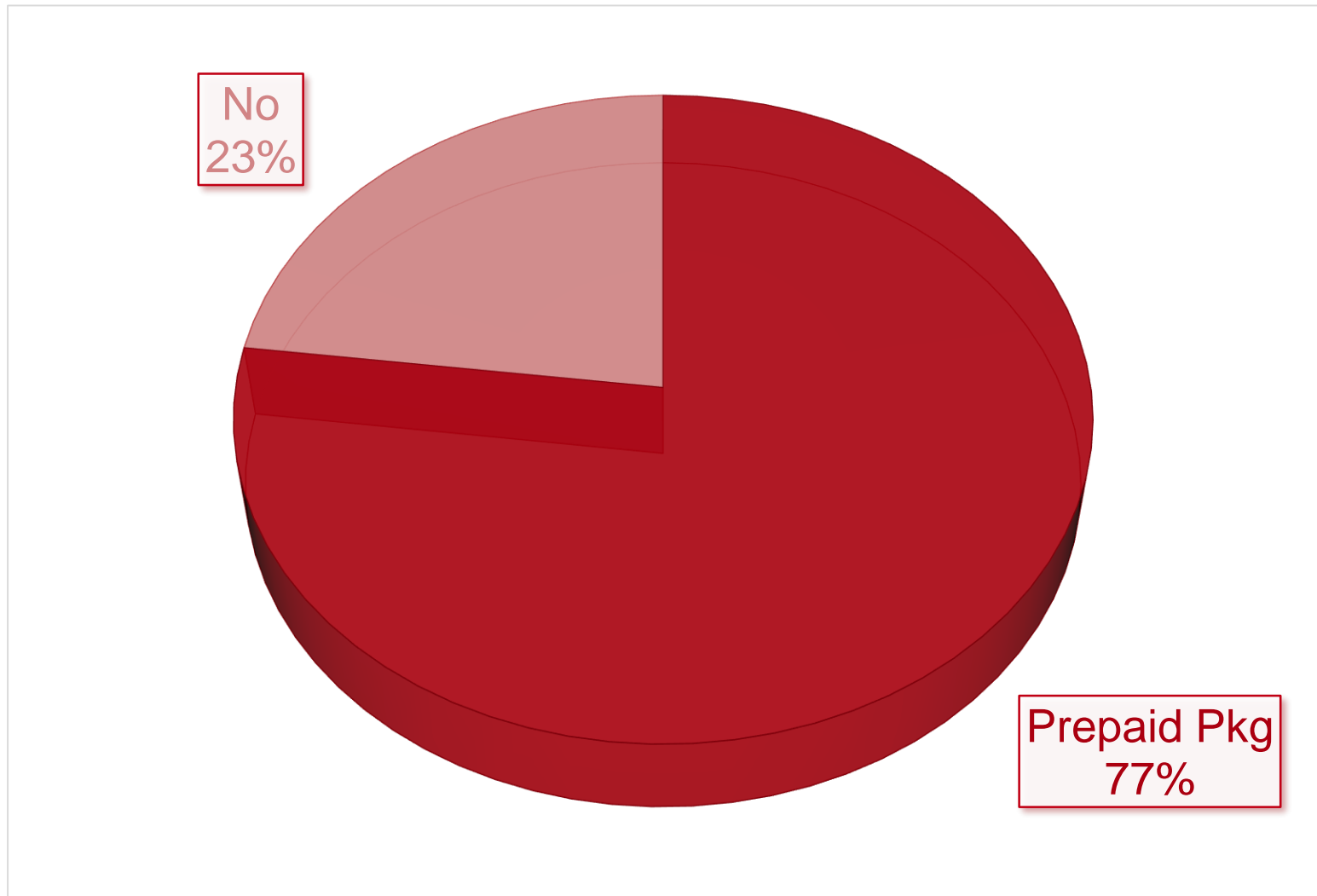
# TRAVEL ARRANGEMENT - SOURCES



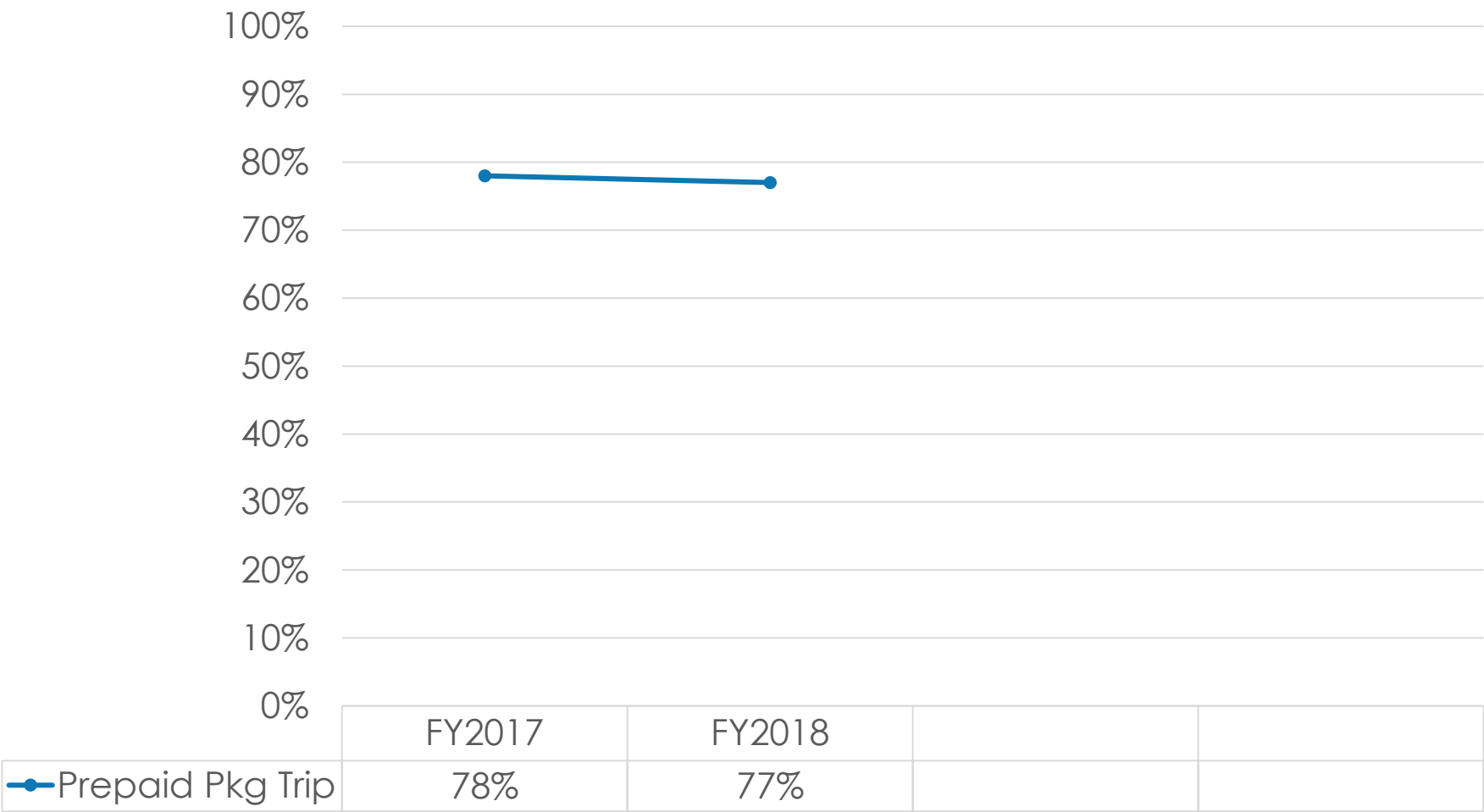
	FY2017	FY2018		
Online travel agent	11%	14%		
Trvl Agt/ Co- Pkg Tour	64%	59%		
Online 3rd Party	5%	7%		
Direct Air/ Hotel	20%	20%		



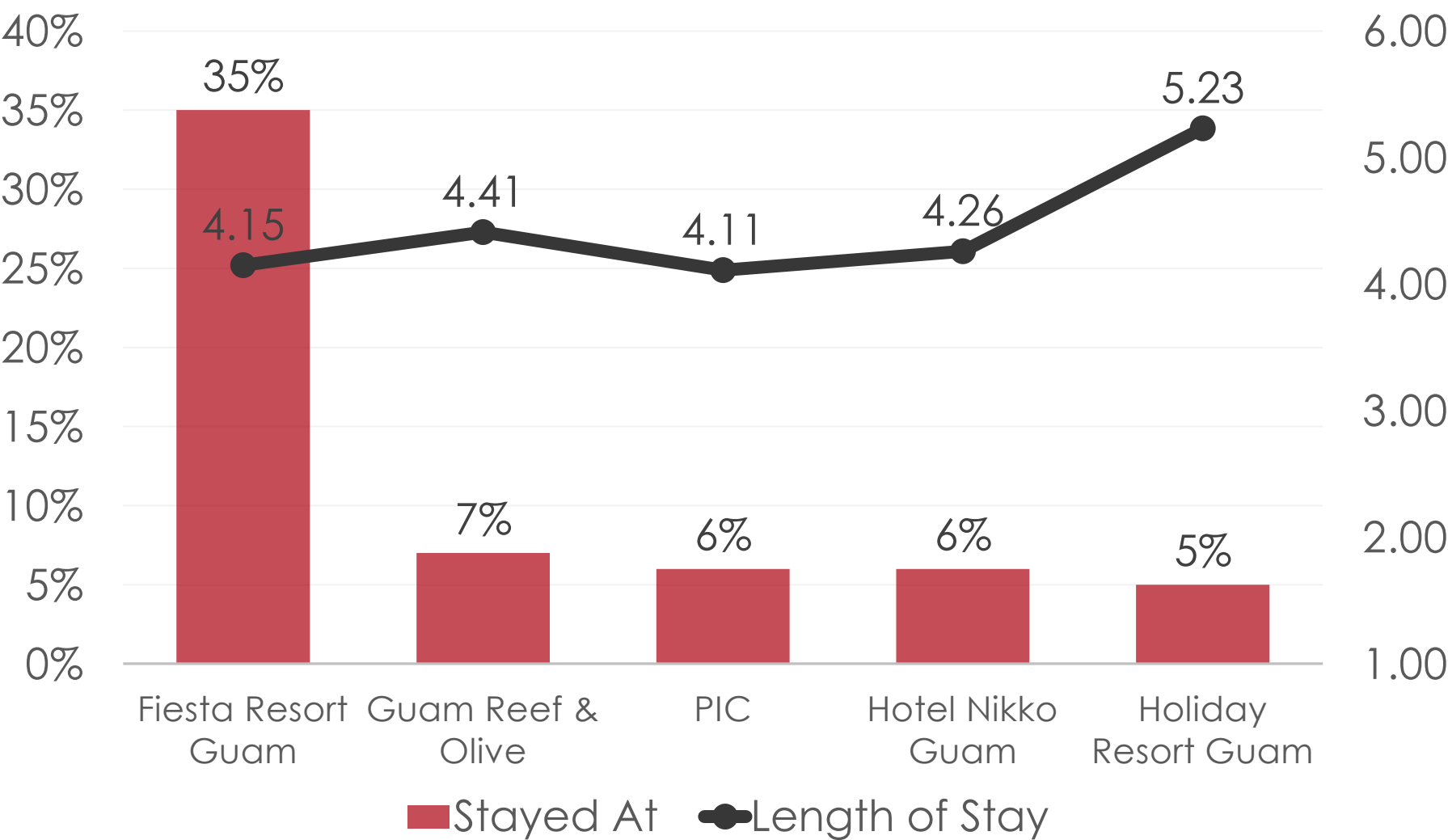
# Prepaid Package Trip



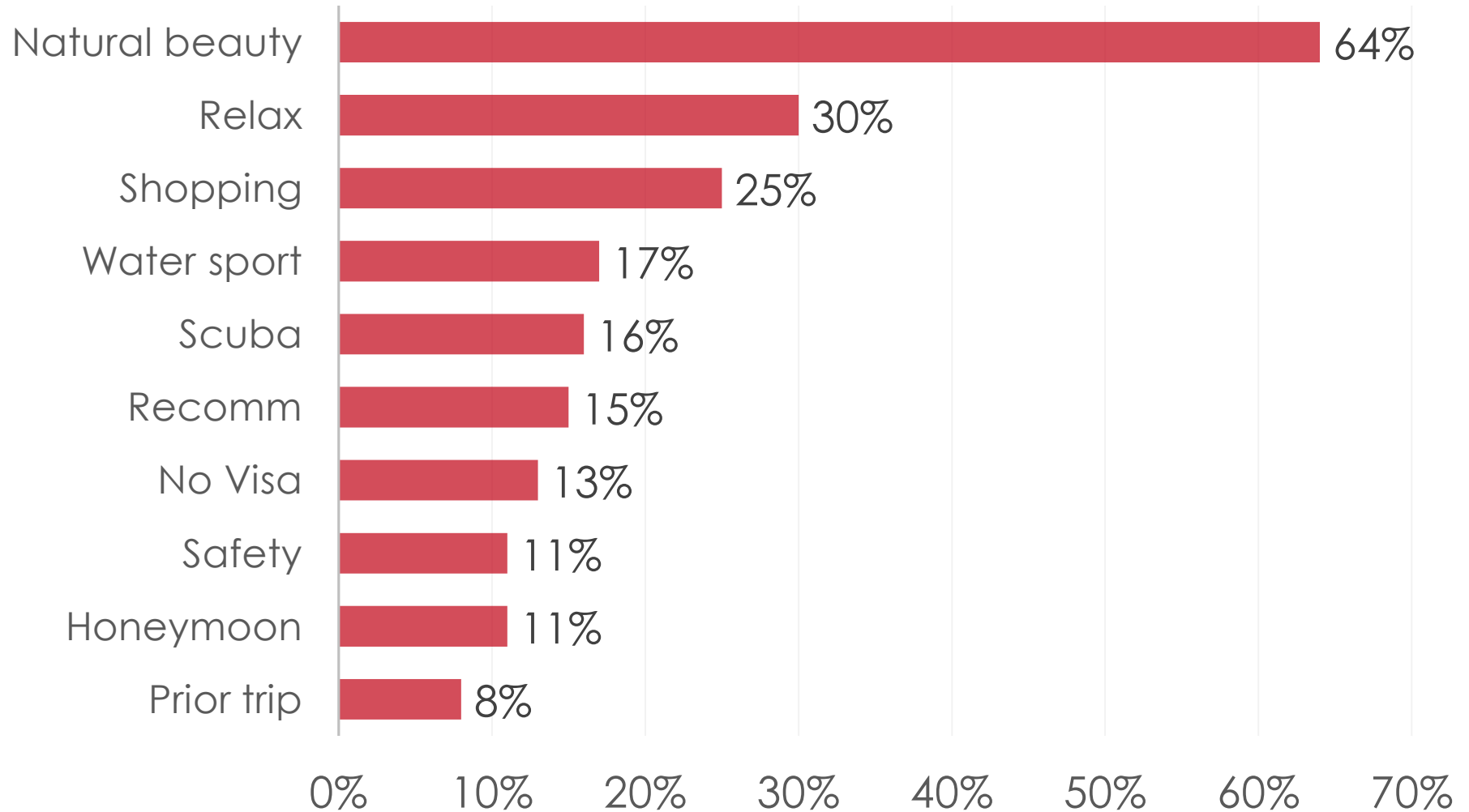
# Prepaid Package Trip



# Accommodations (Top Responses)



# Travel Motivation (Top Responses)



# Travel Motivation – Top 3

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

FY2018
<b>64% Natural Beauty</b> <b>30% Relax</b> <b>25% Shopping</b>

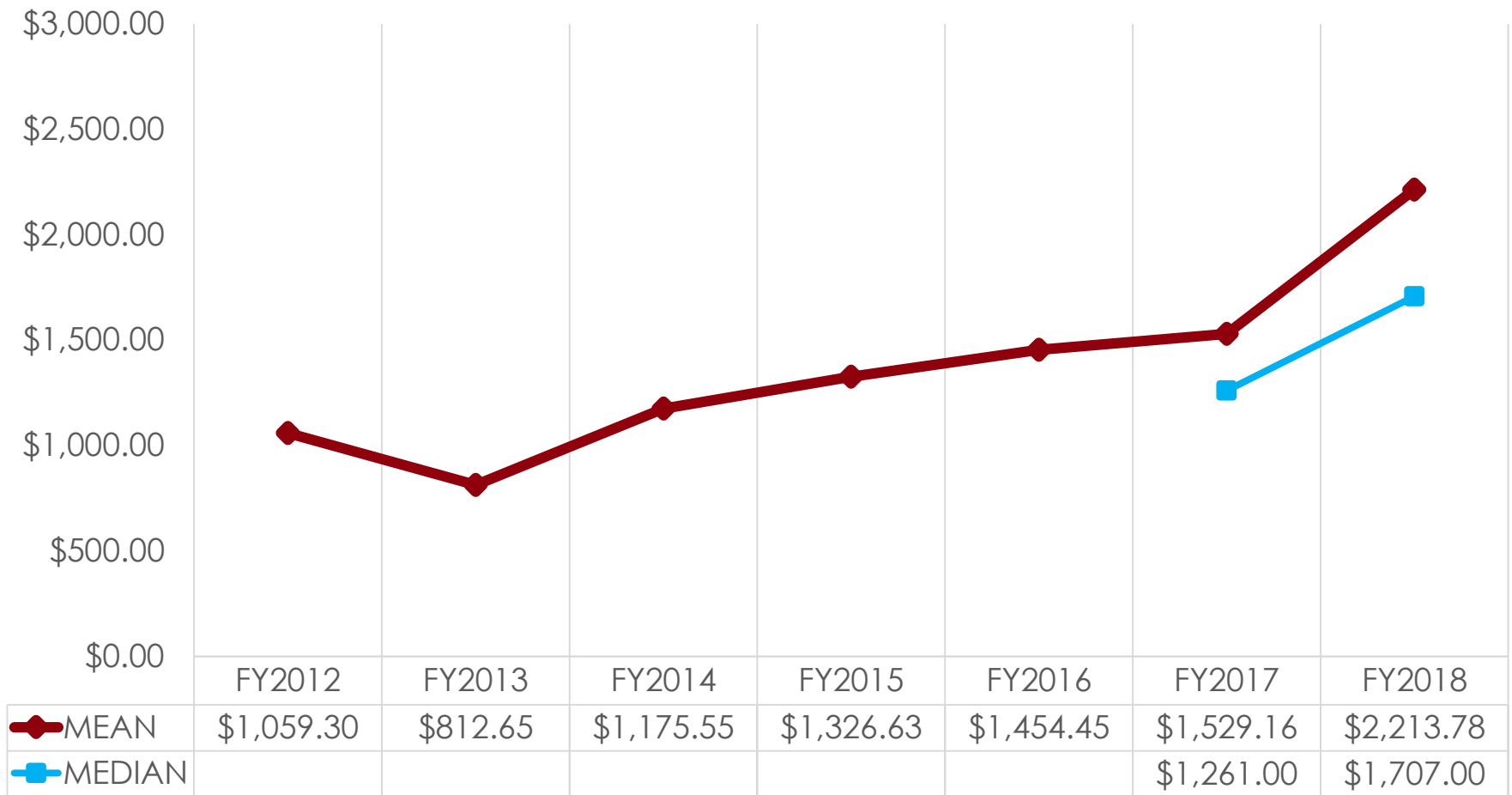
# SECTION 3

# EXPENDITURES

# Prepaid Expenditures

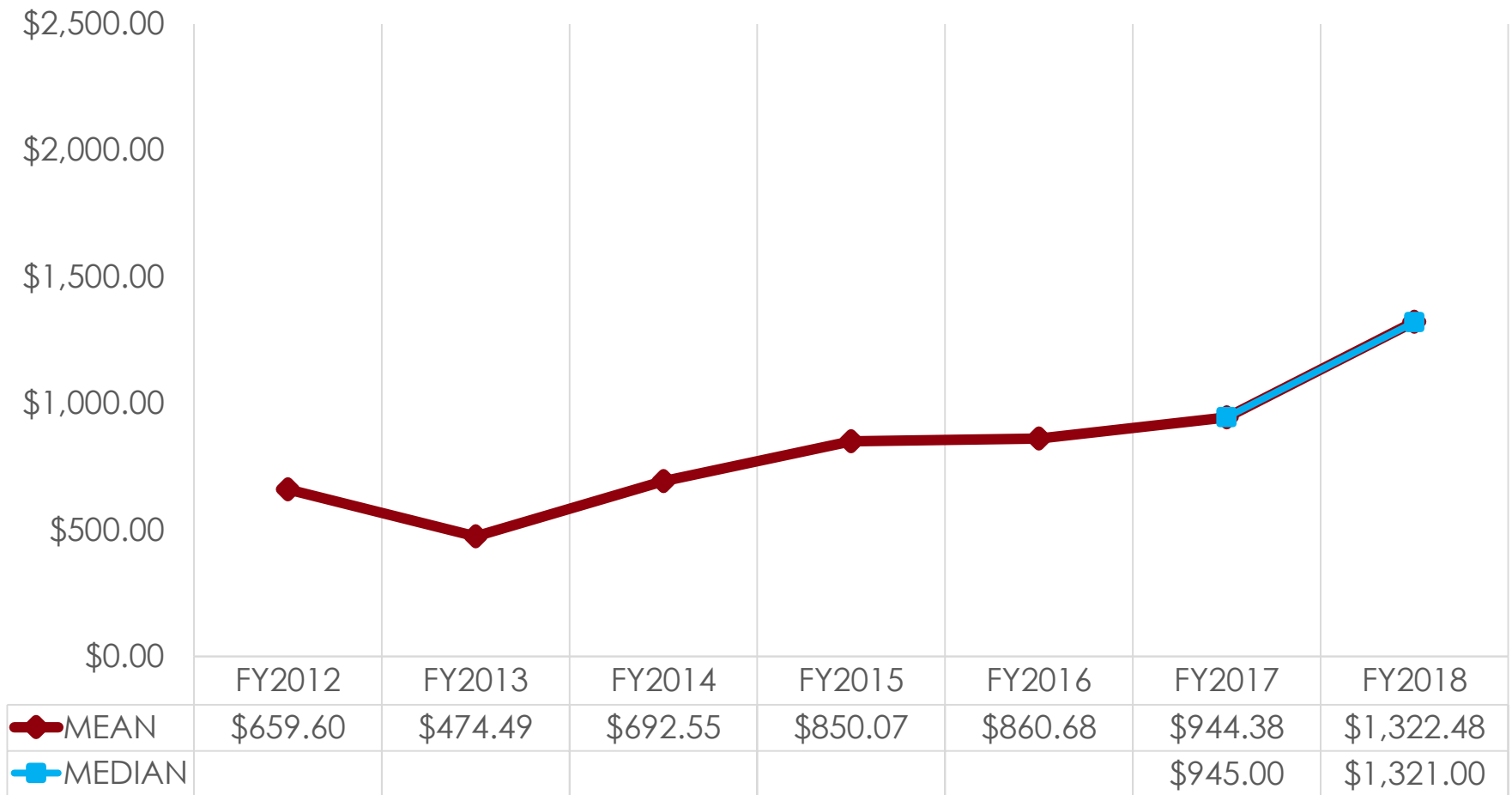
- \$2,213.78 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$1,322.48 = overall mean average per person prepaid expenditures

# Prepaid Entire Travel Party – Tracking

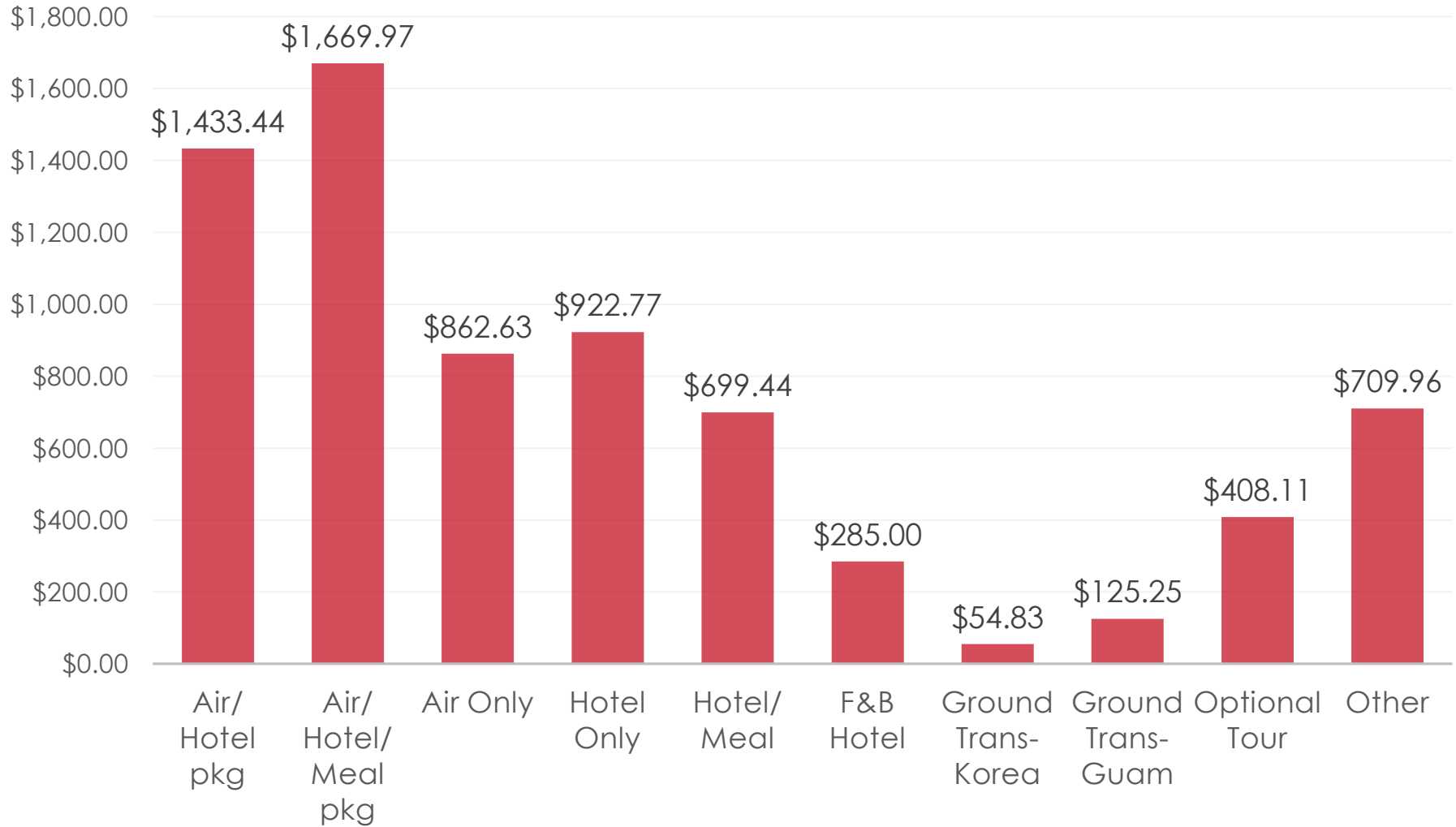




# Prepaid Per Person – Tracking

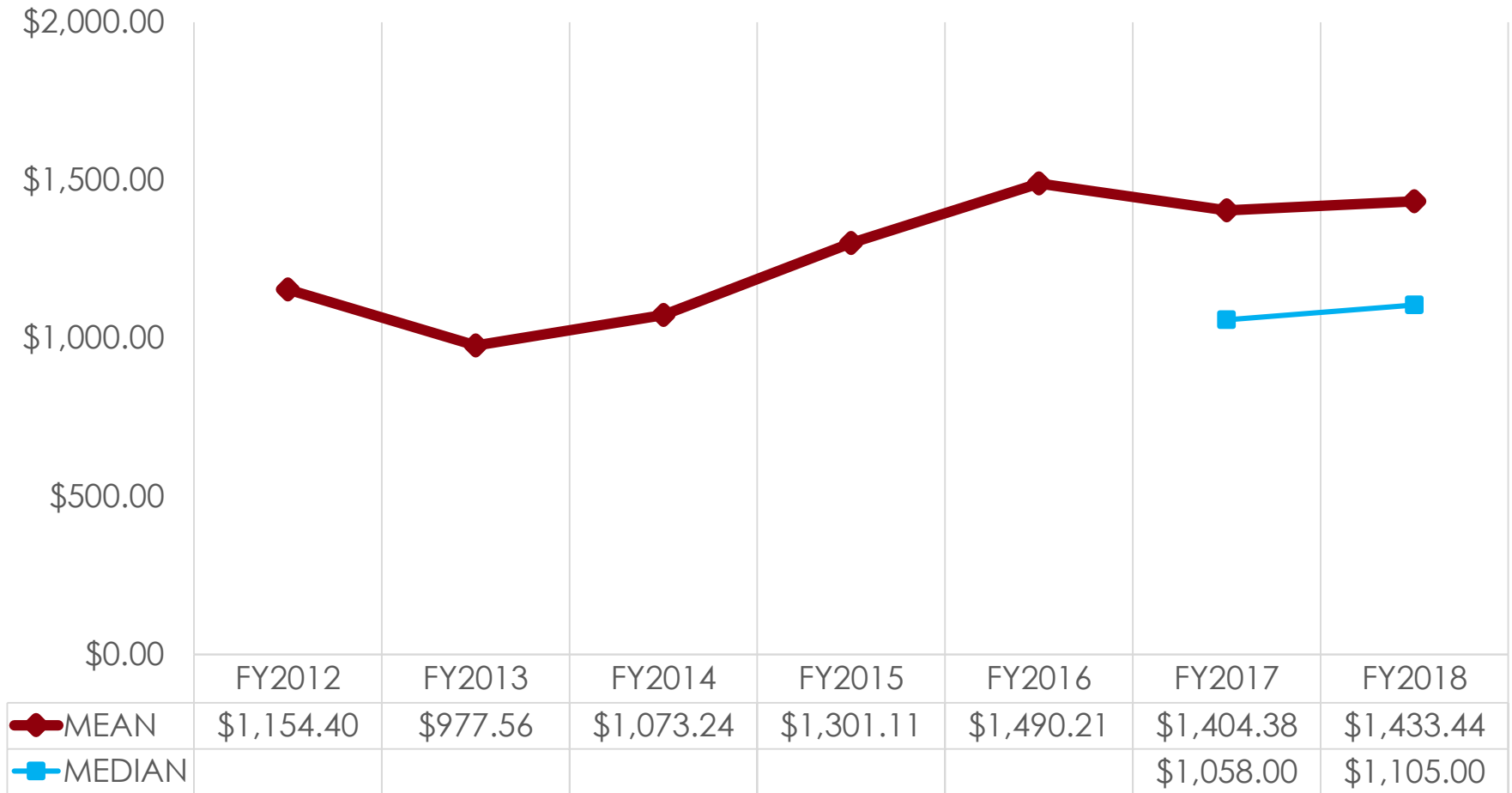


# Prepaid Expenses by Category – Mean Entire Travel Party



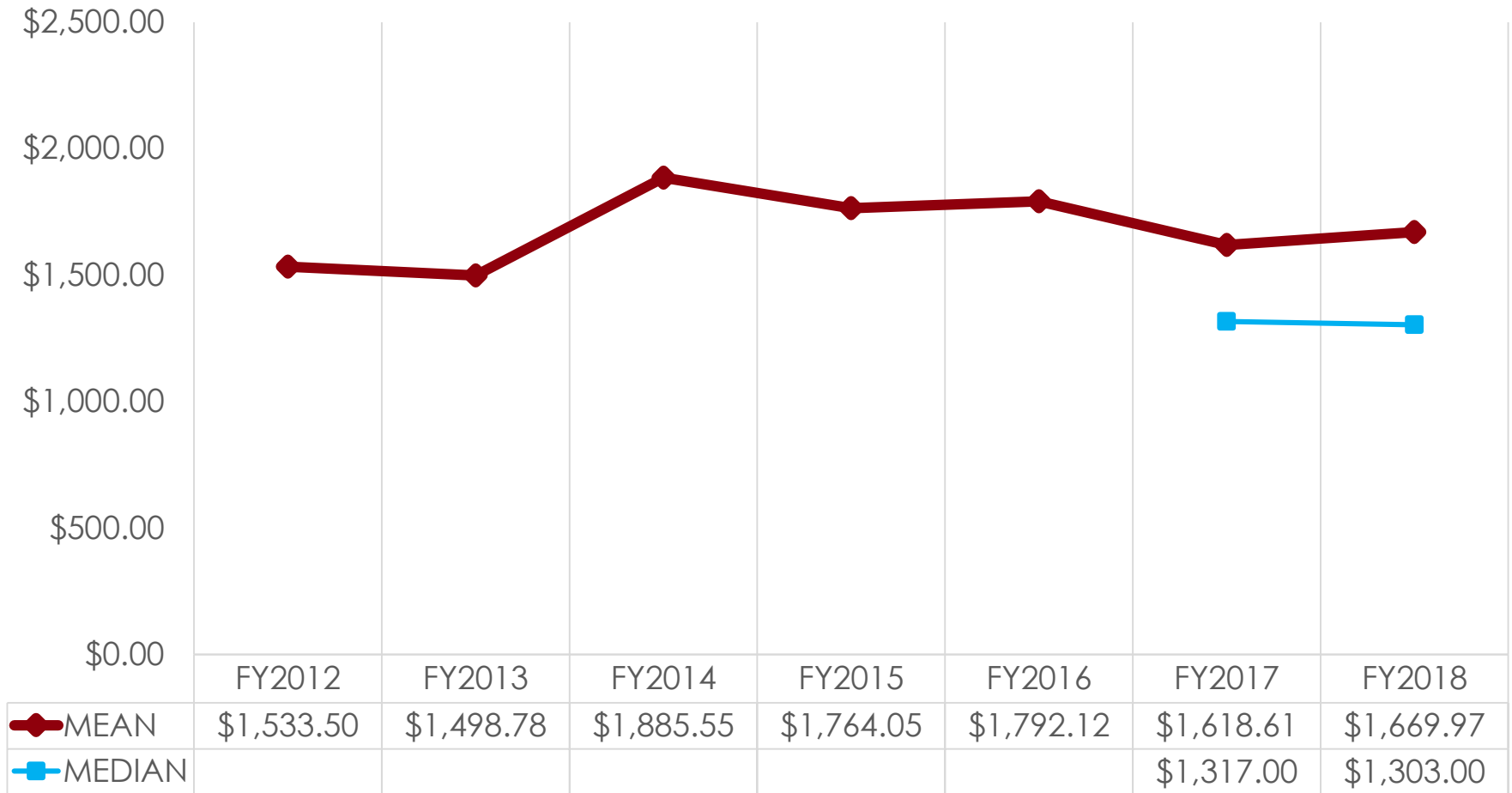
# Prepaid – Tracking

## Airfare & Accommodation Packages

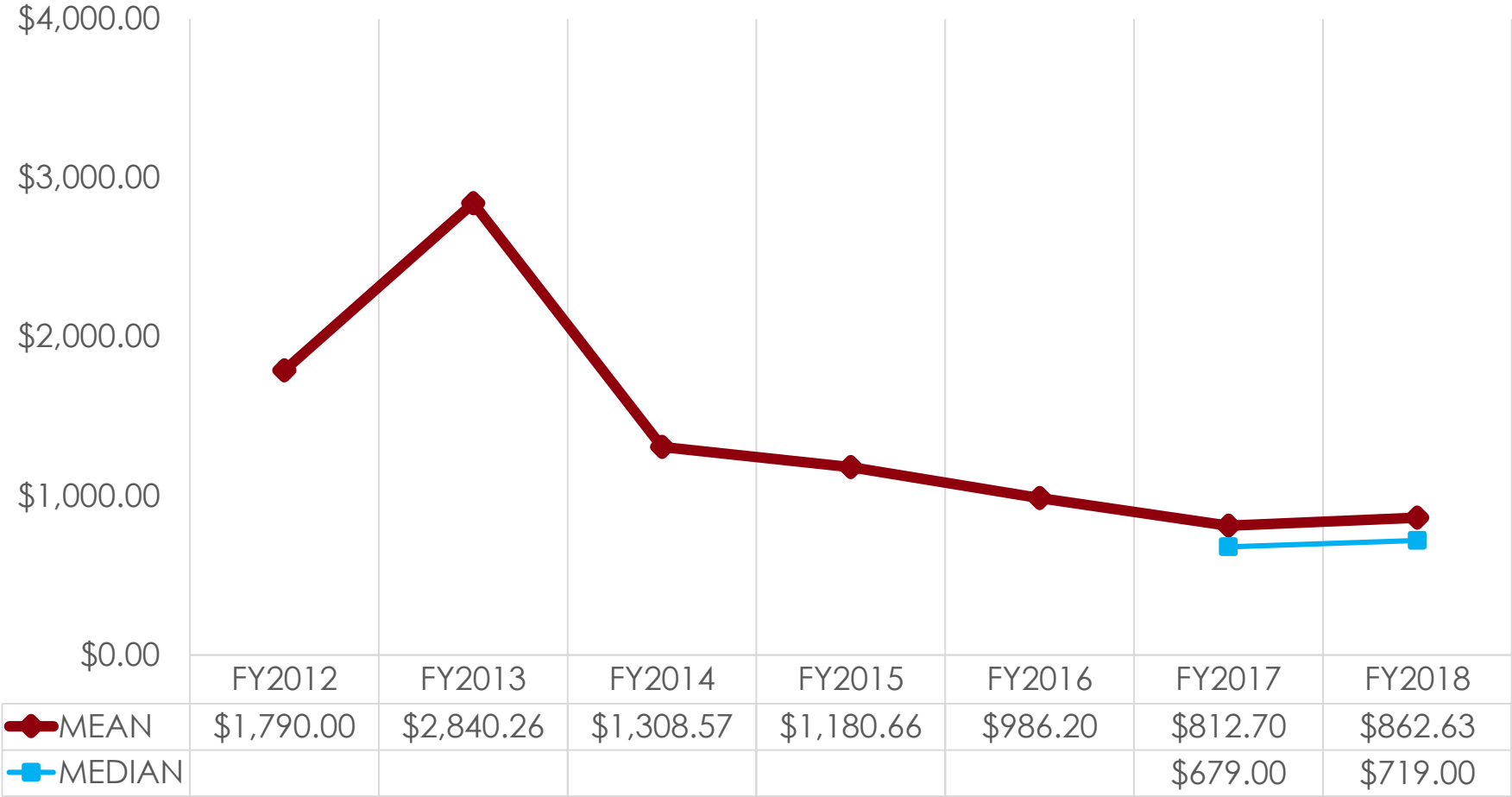


# Prepaid – Tracking

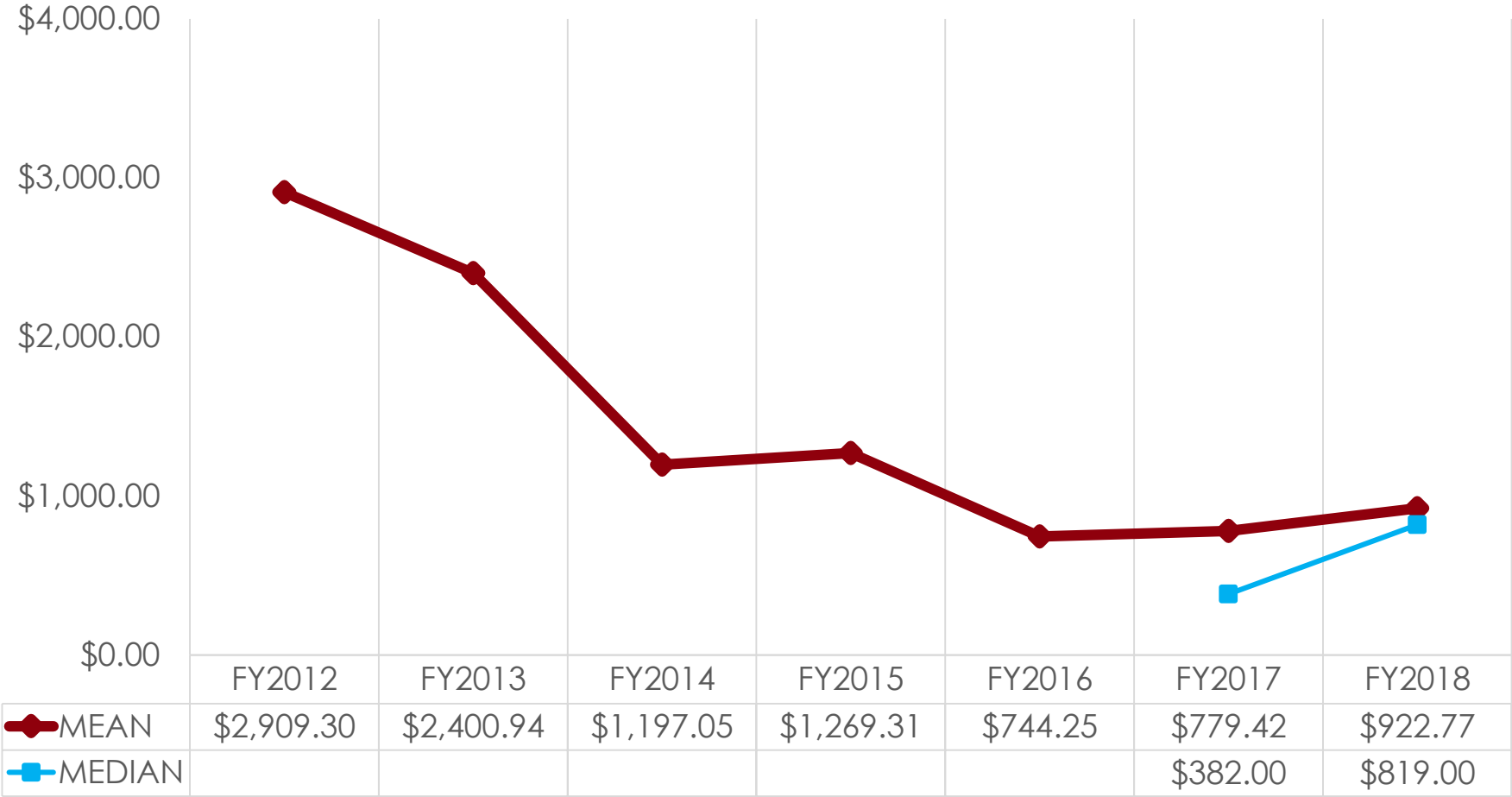
## Airfare & Accommodation W/ Meal Packages



# Prepaid –Tracking Airfare Only

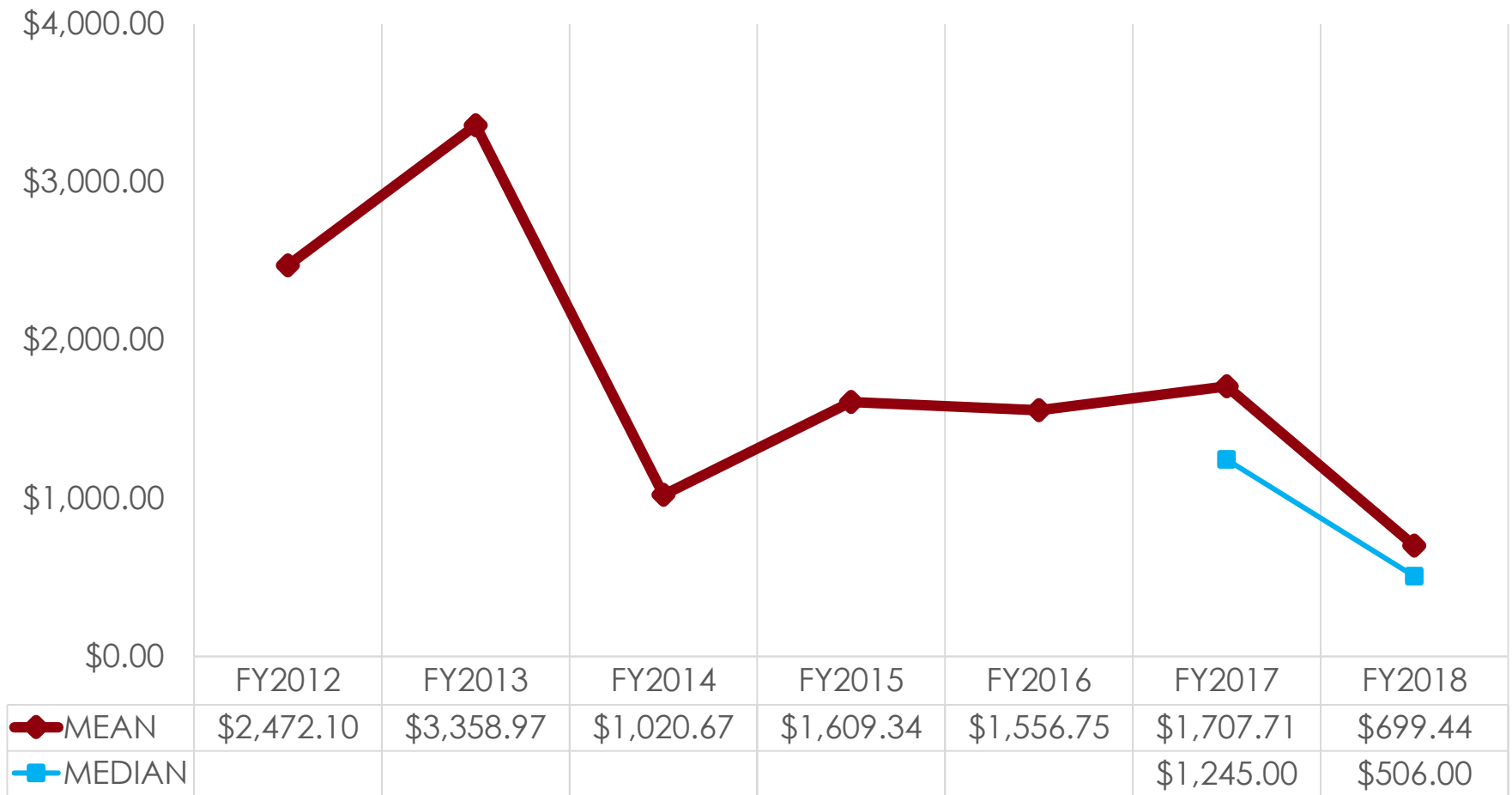


# Prepaid – Tracking Accommodations Only



# Prepaid – Tracking

## Accommodations w/ Meal Only



# Prepaid – Tracking

## Food & Beverage in Hotel





# Prepaid – Tracking

## Ground Transportation - Taiwan



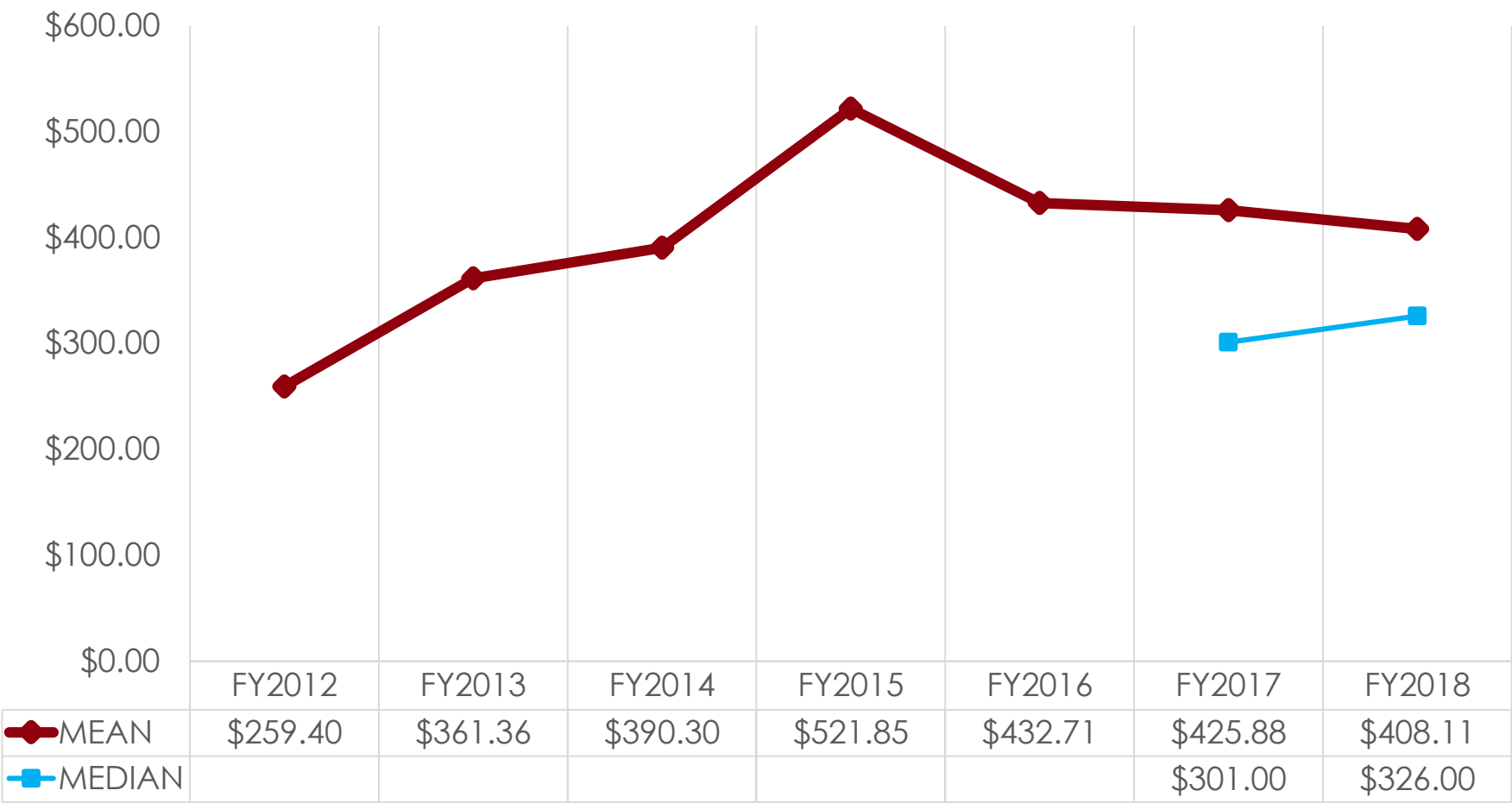
# Prepaid – Tracking

## Ground Transportation - Guam



# Prepaid – Tracking

## Optional tours/ Activities



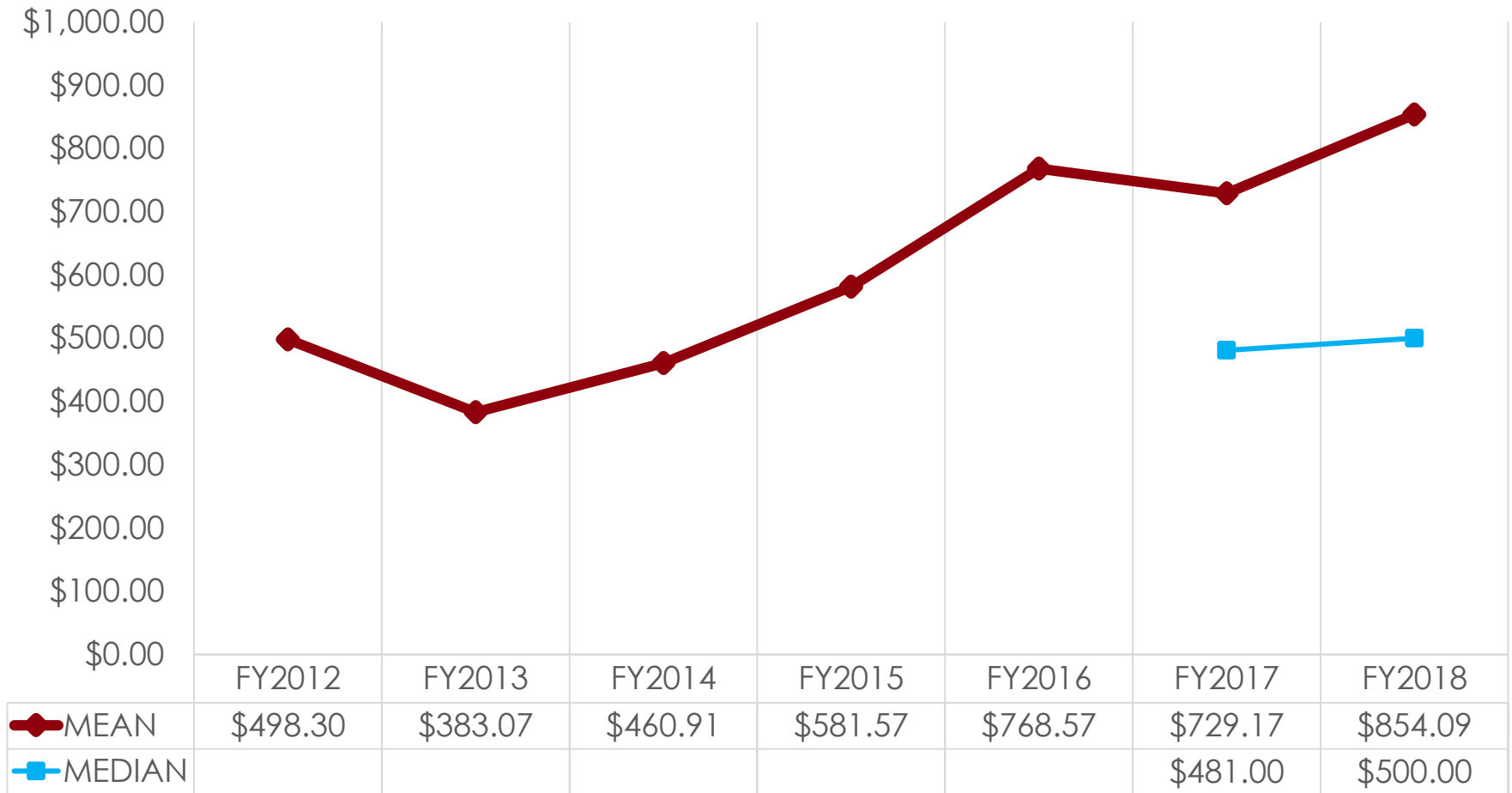
# On-Island Expenditures

- \$1,276.53 = overall mean average on-island expense (for entire travel party size) by respondent
- \$854.09 = overall mean average per person prepaid expenditures

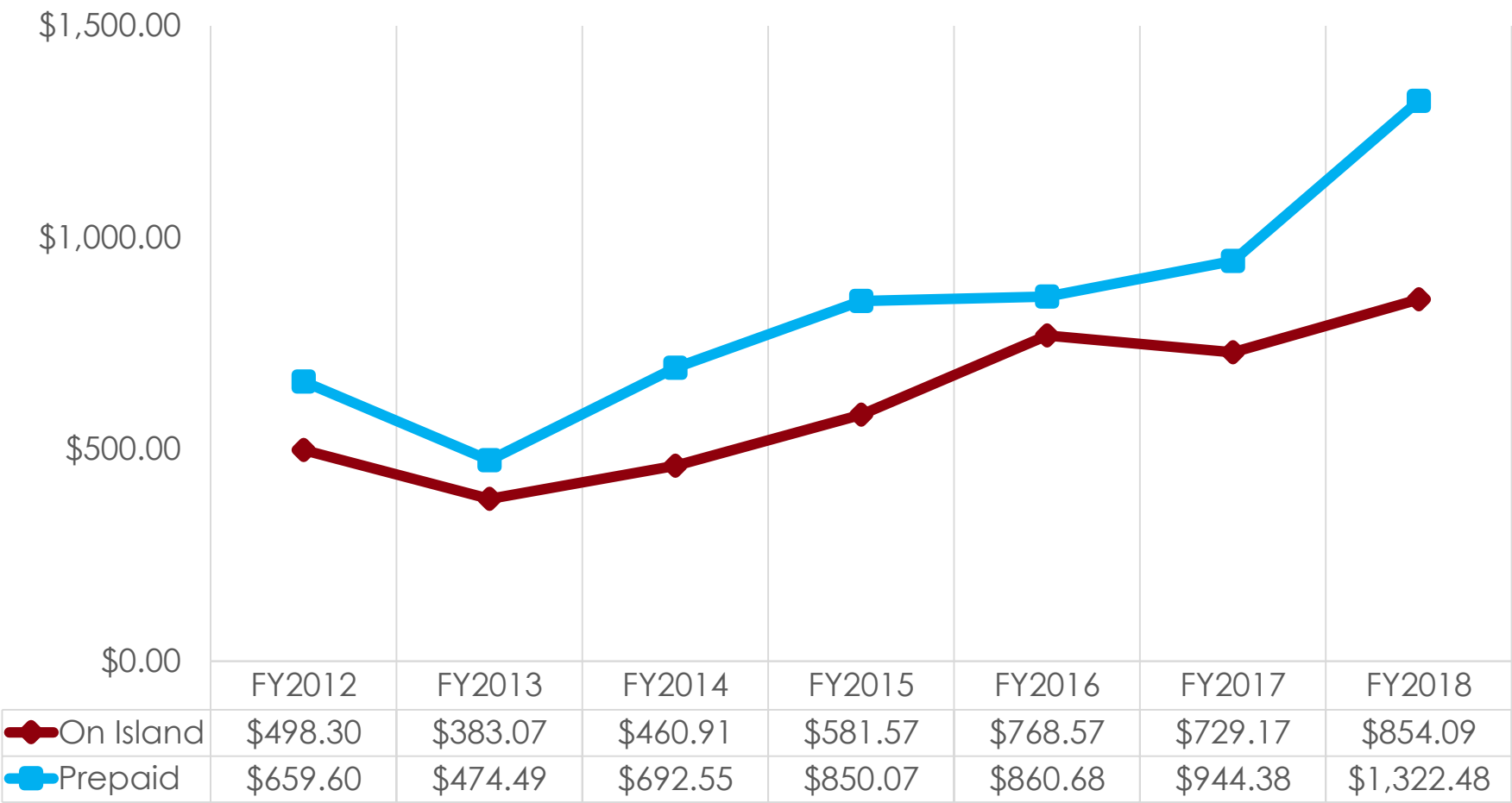
# On-Island Entire Travel Party – Tracking



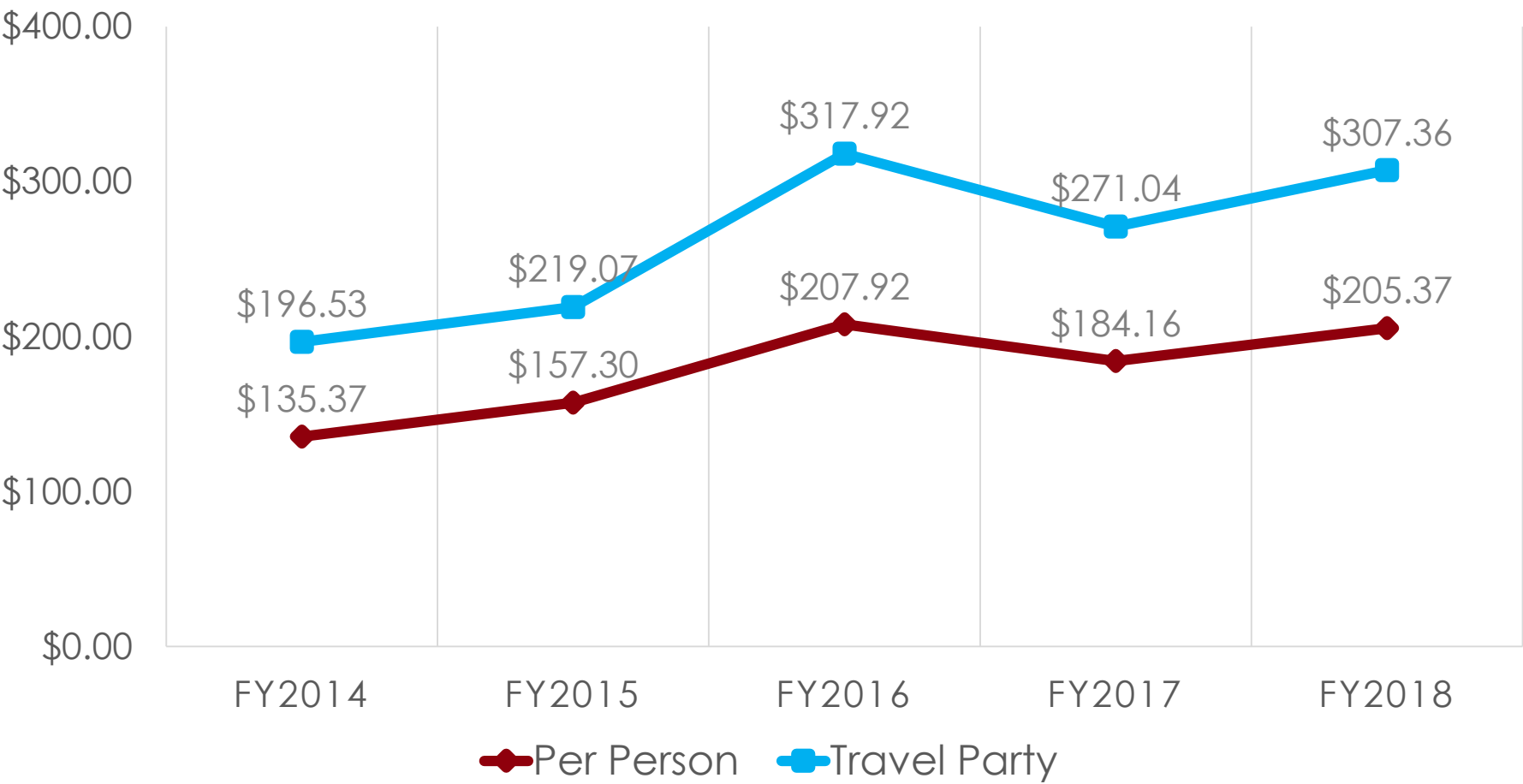
# On-Island Per Person – Tracking



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

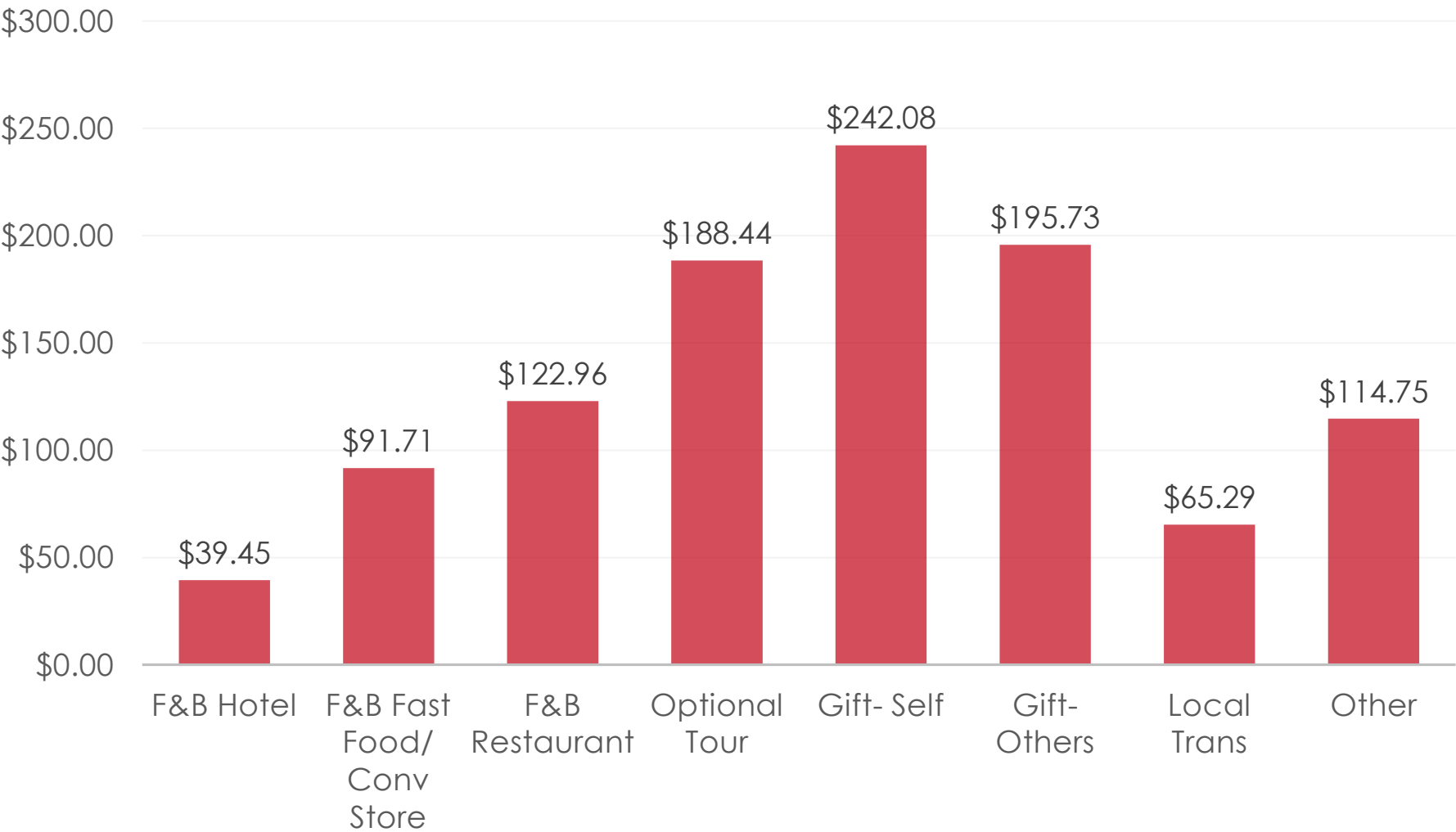


# On-Island Per Day Spending – Tracking Mean



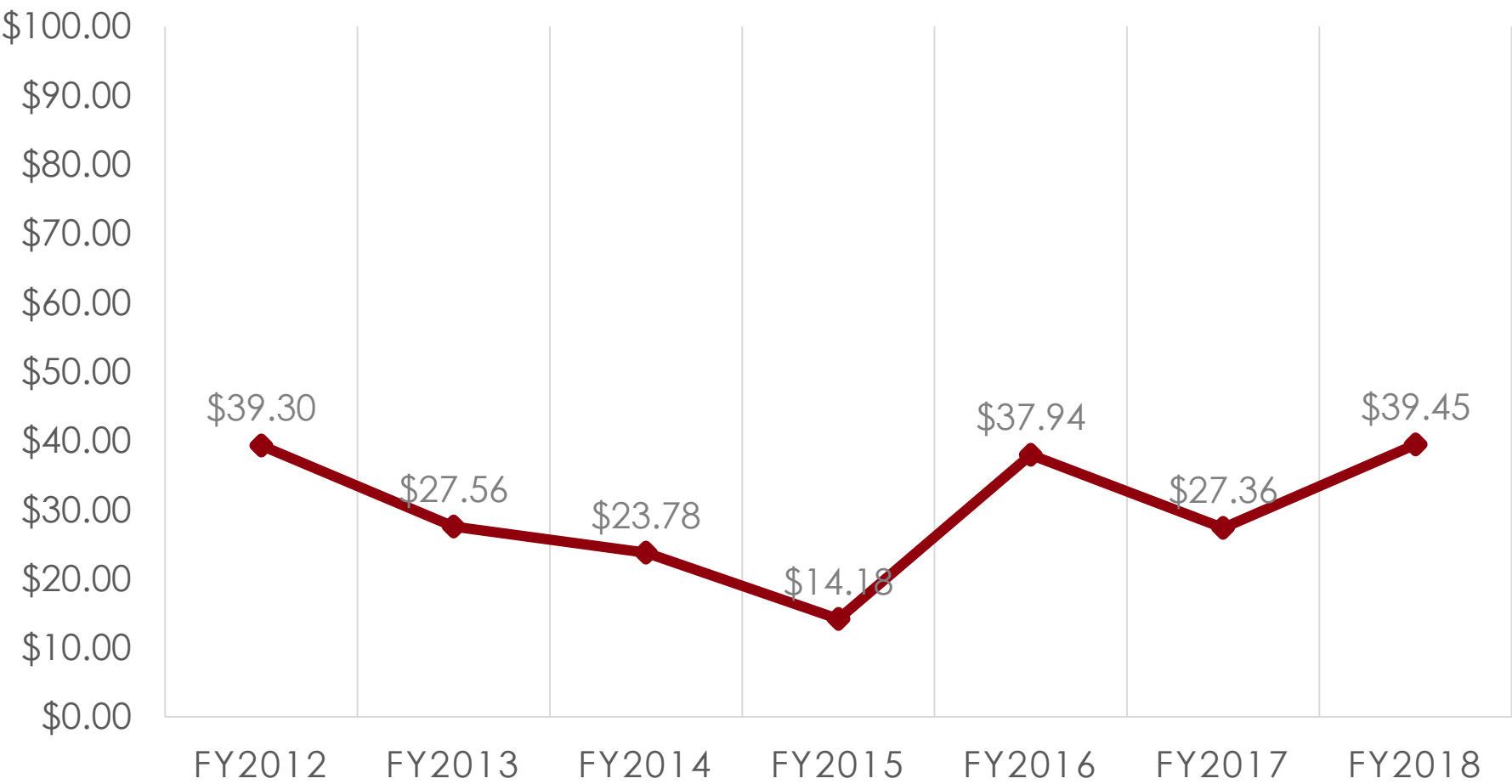


# On-Island Expenses by Category – Mean Entire Travel Party



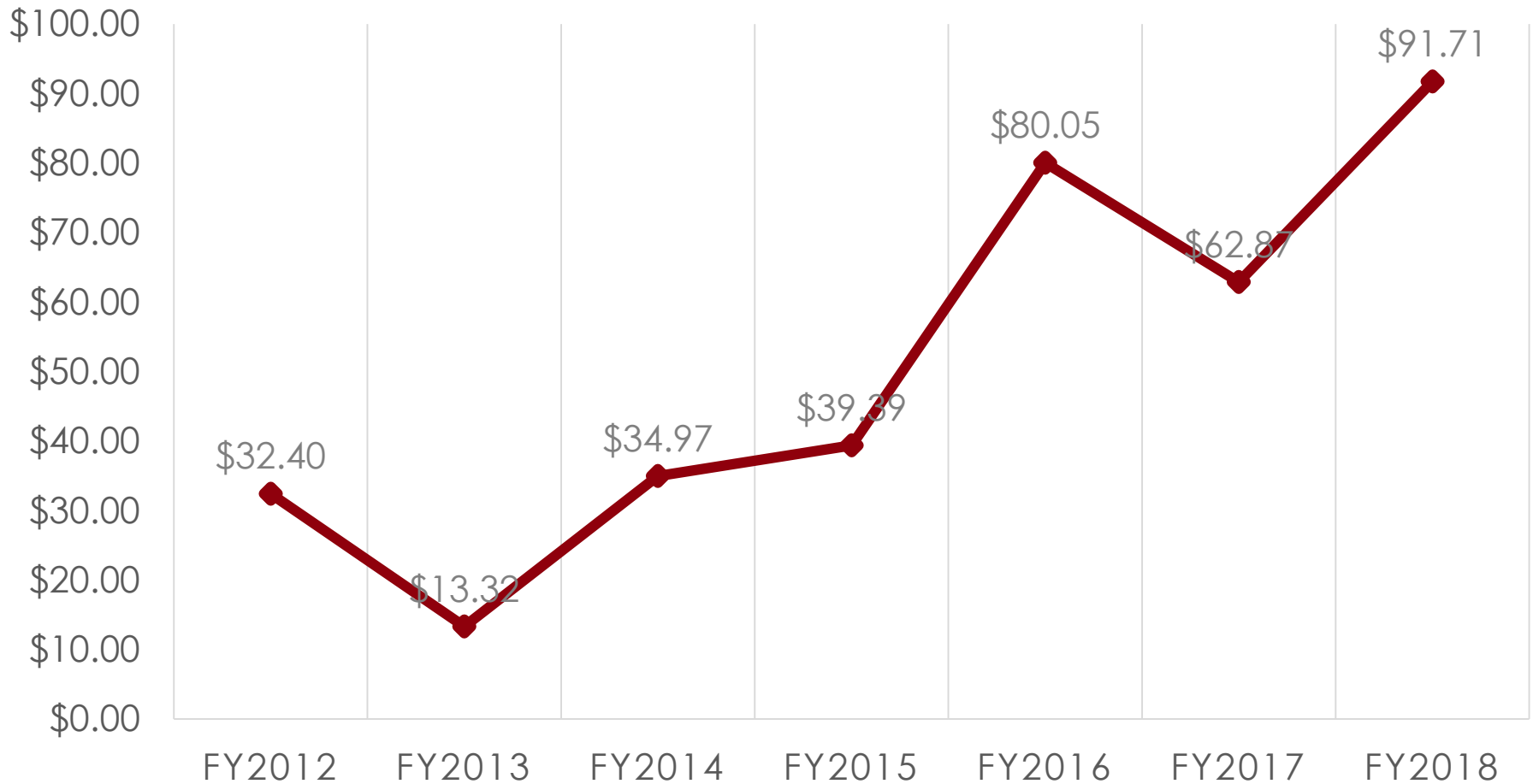
# On-Island – Tracking

## Food & Beverage - Hotel



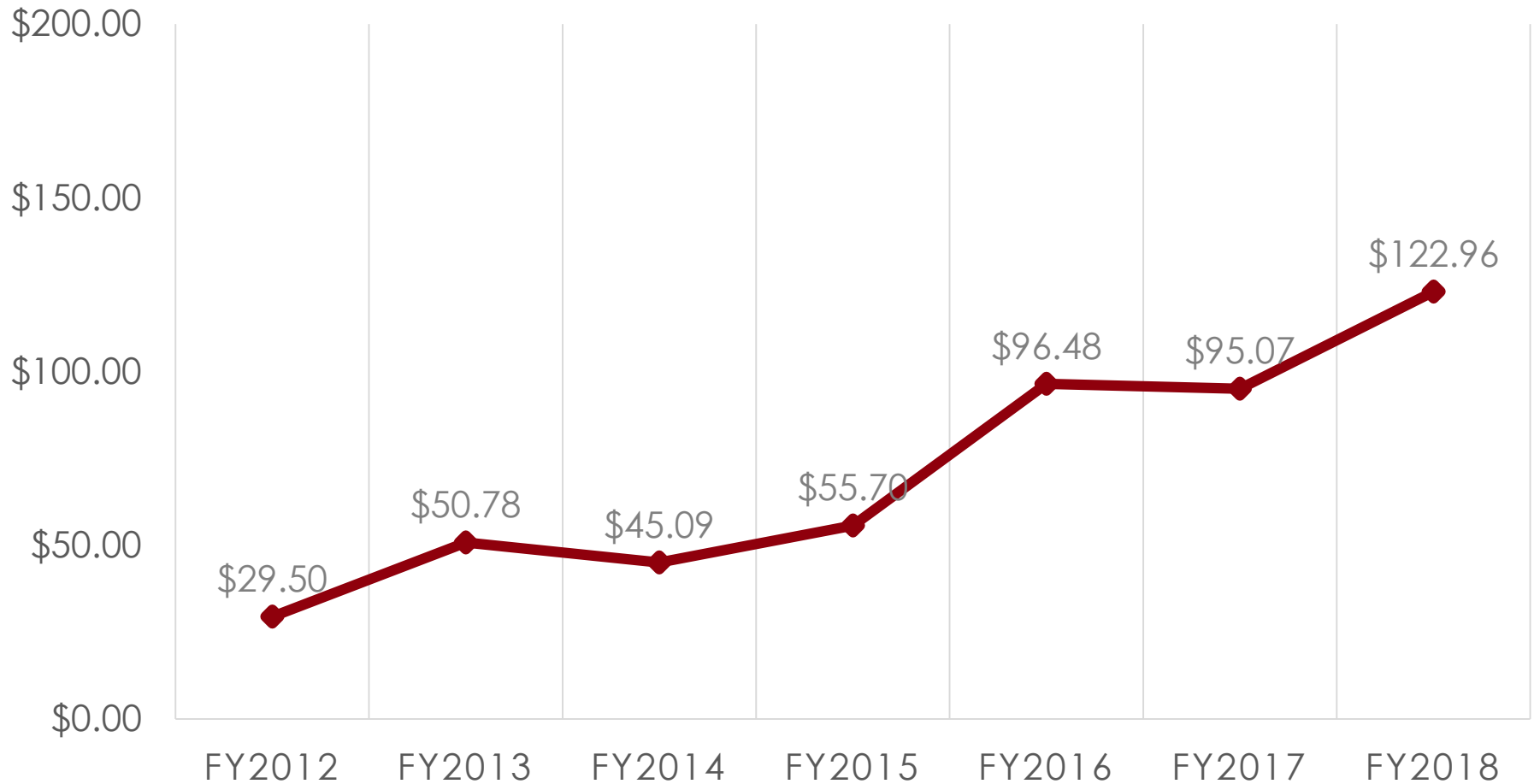
# On-Island – Tracking

## Food & Beverage – Fast Food/ Convenience Store



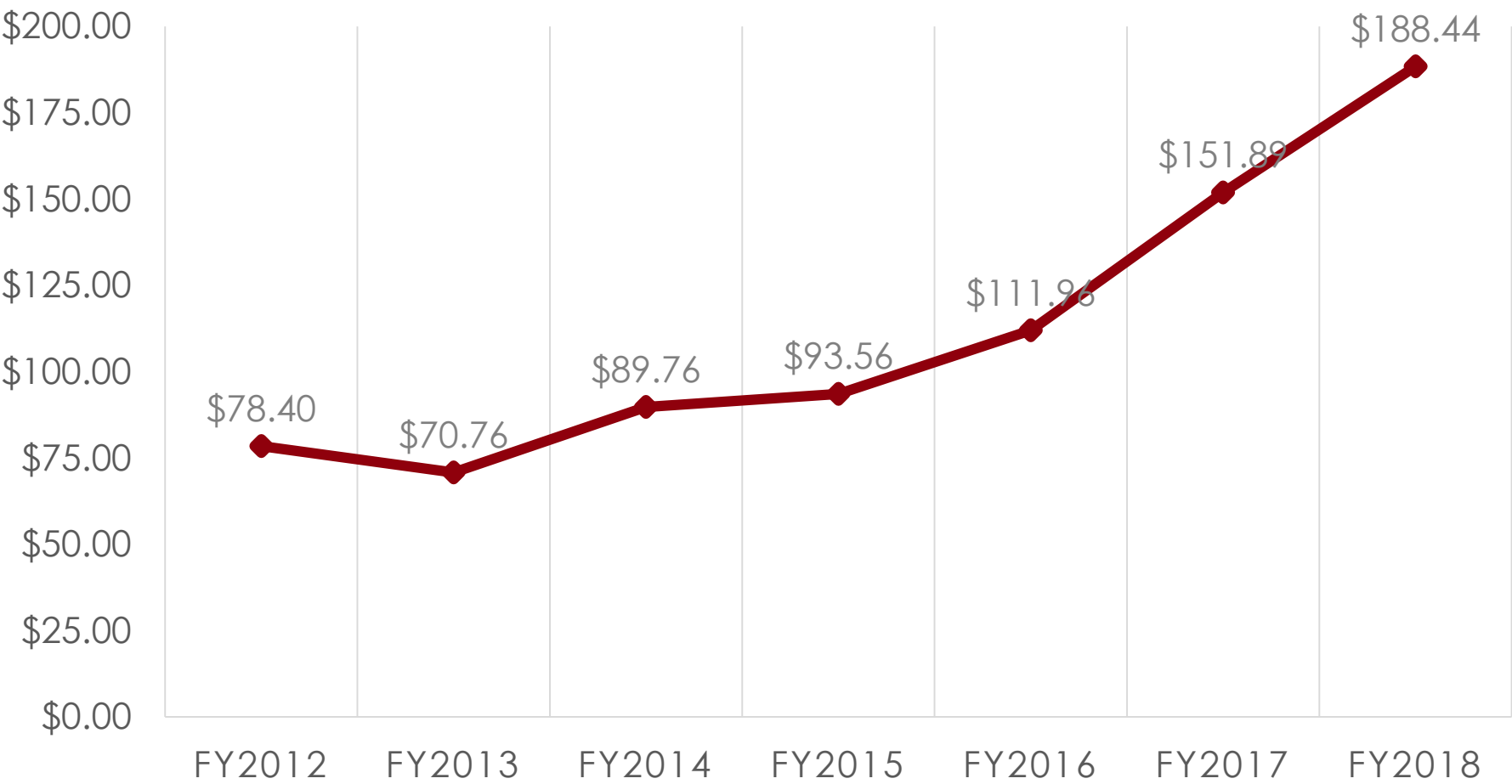
# On-Island – Tracking

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



# On-Island – Tracking

## Optional tour/ Activities



# On-Island – Tracking

## Gift/ Souvenir – Self/ Companion

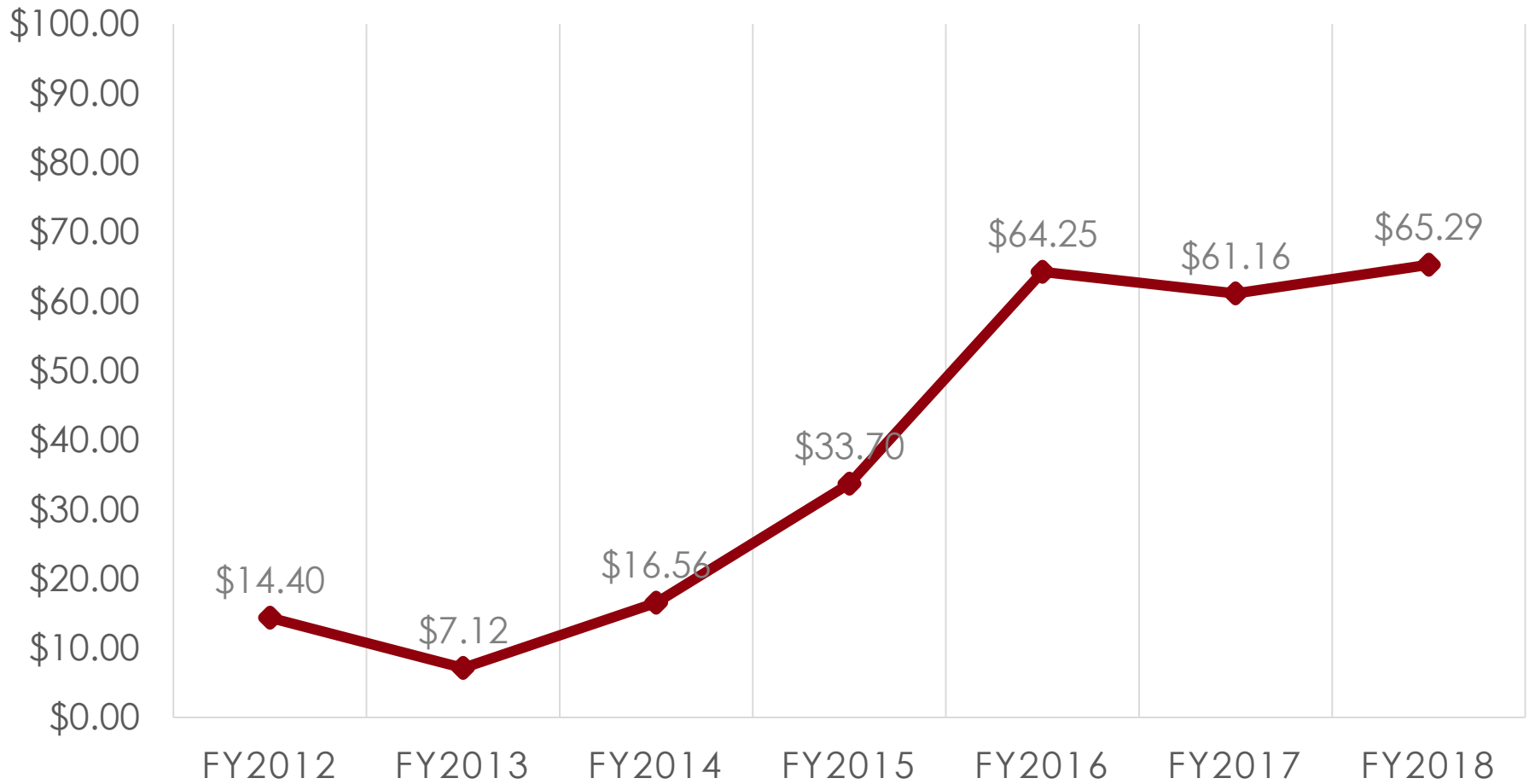


# On-Island – Tracking

## Gift/ Souvenir – Friends/ Family



# On-Island – Tracking Local Transportation





# On-Island – Tracking

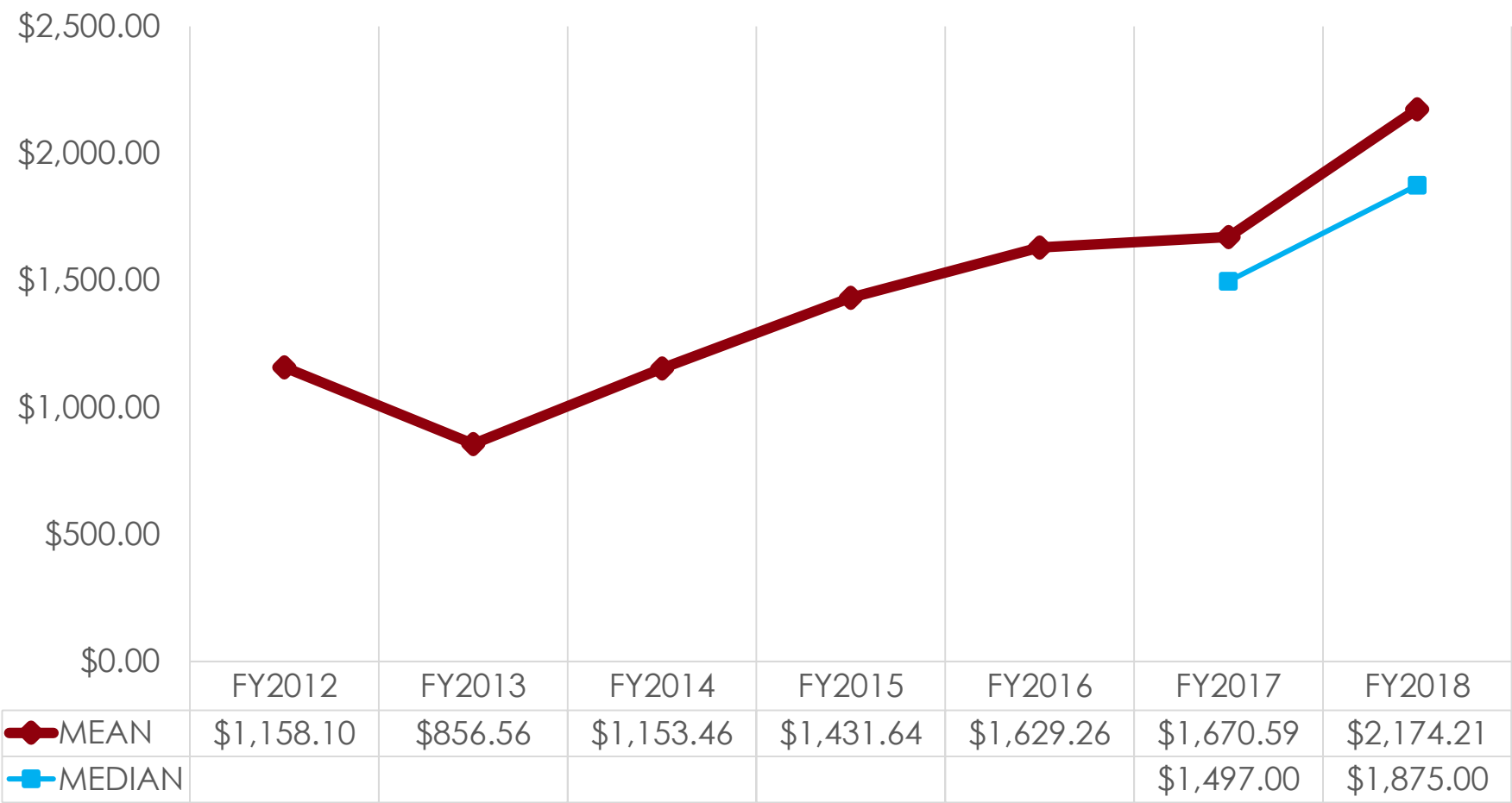
## Other Not Included



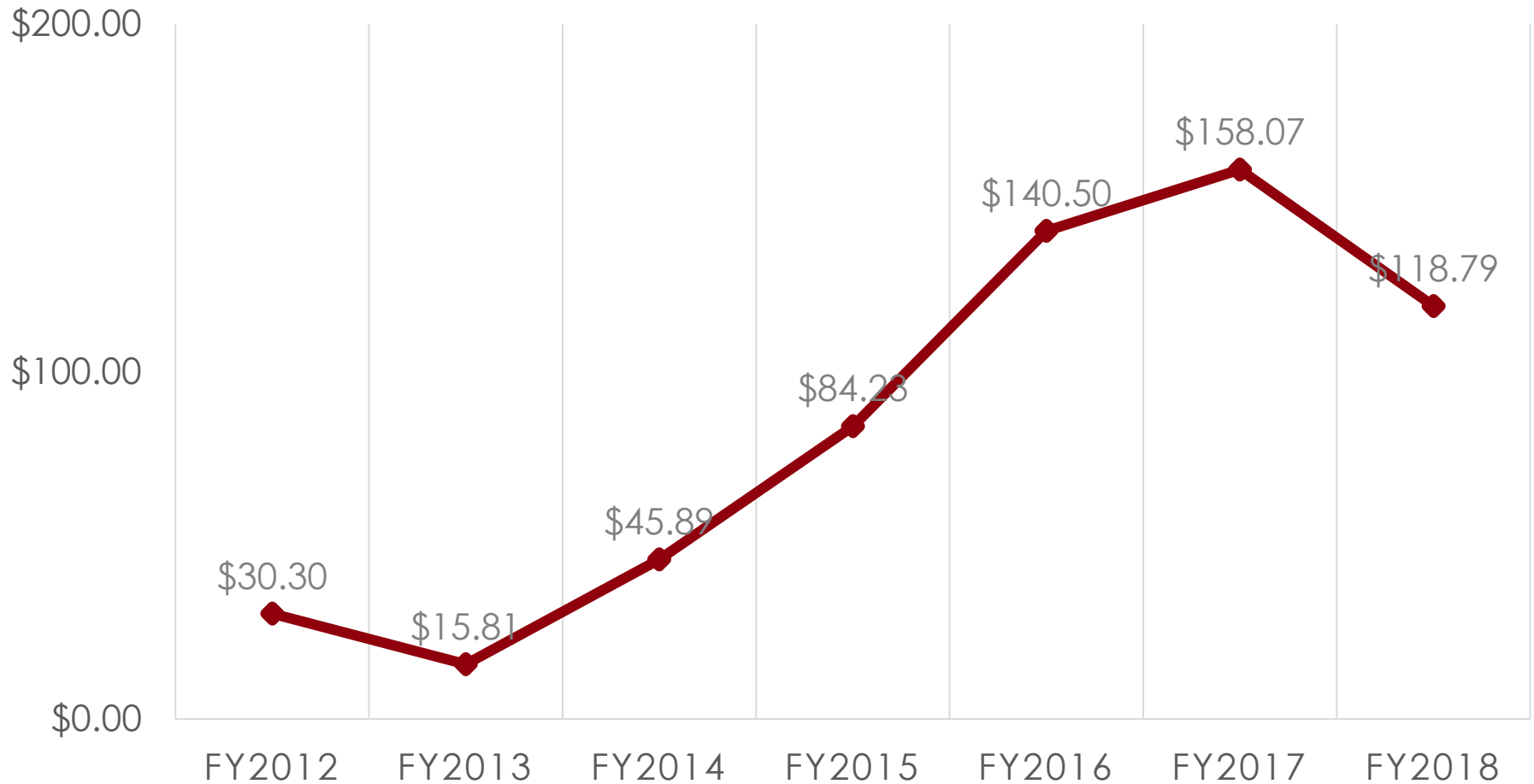
# TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$2,174.21 = TOTAL Per Person Expenditure

# TOTAL Per Person Expenditures – Tracking



# GUAM AIRPORT EXPENDITURE – Tracking

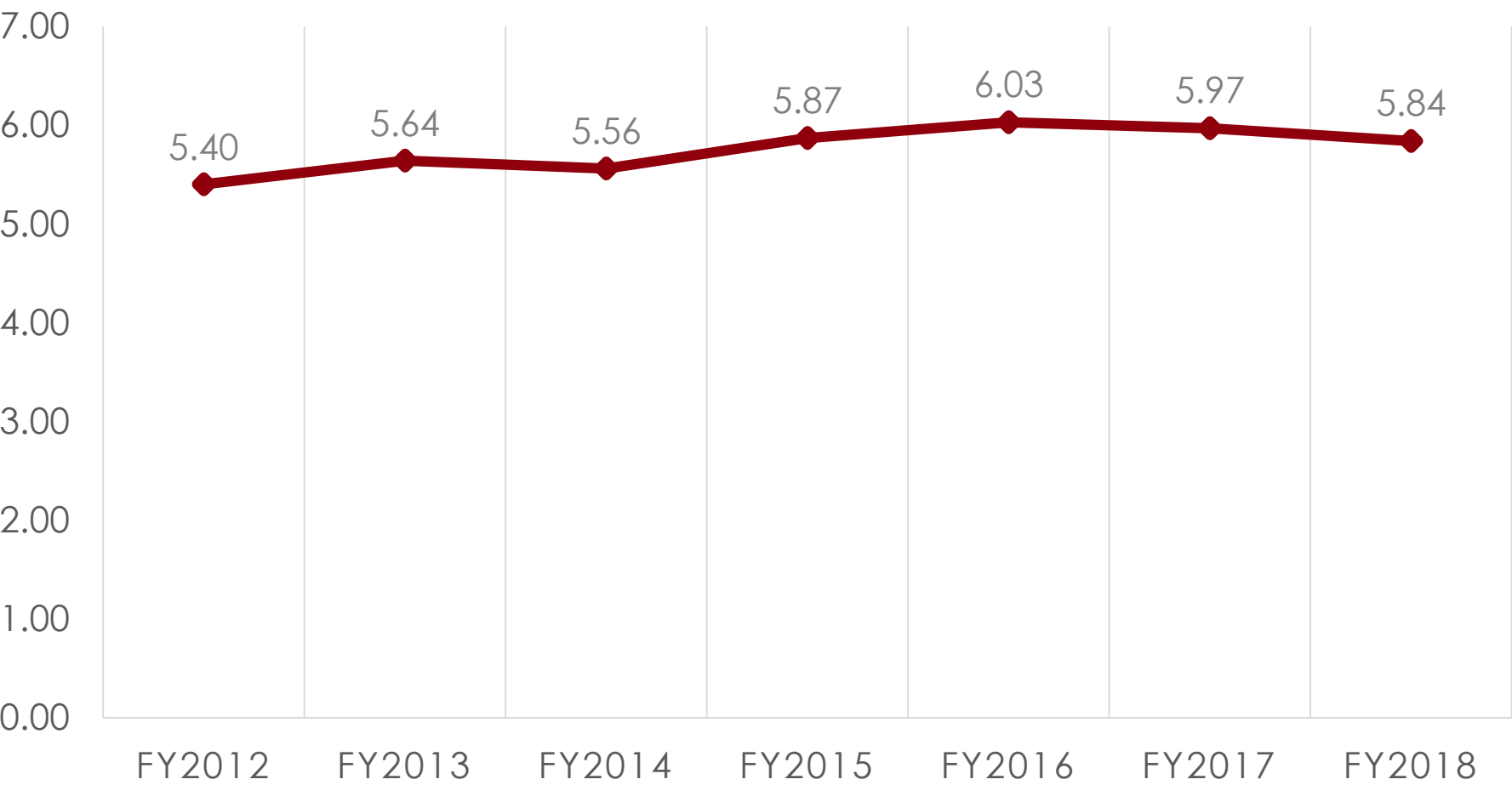


# SECTION 4

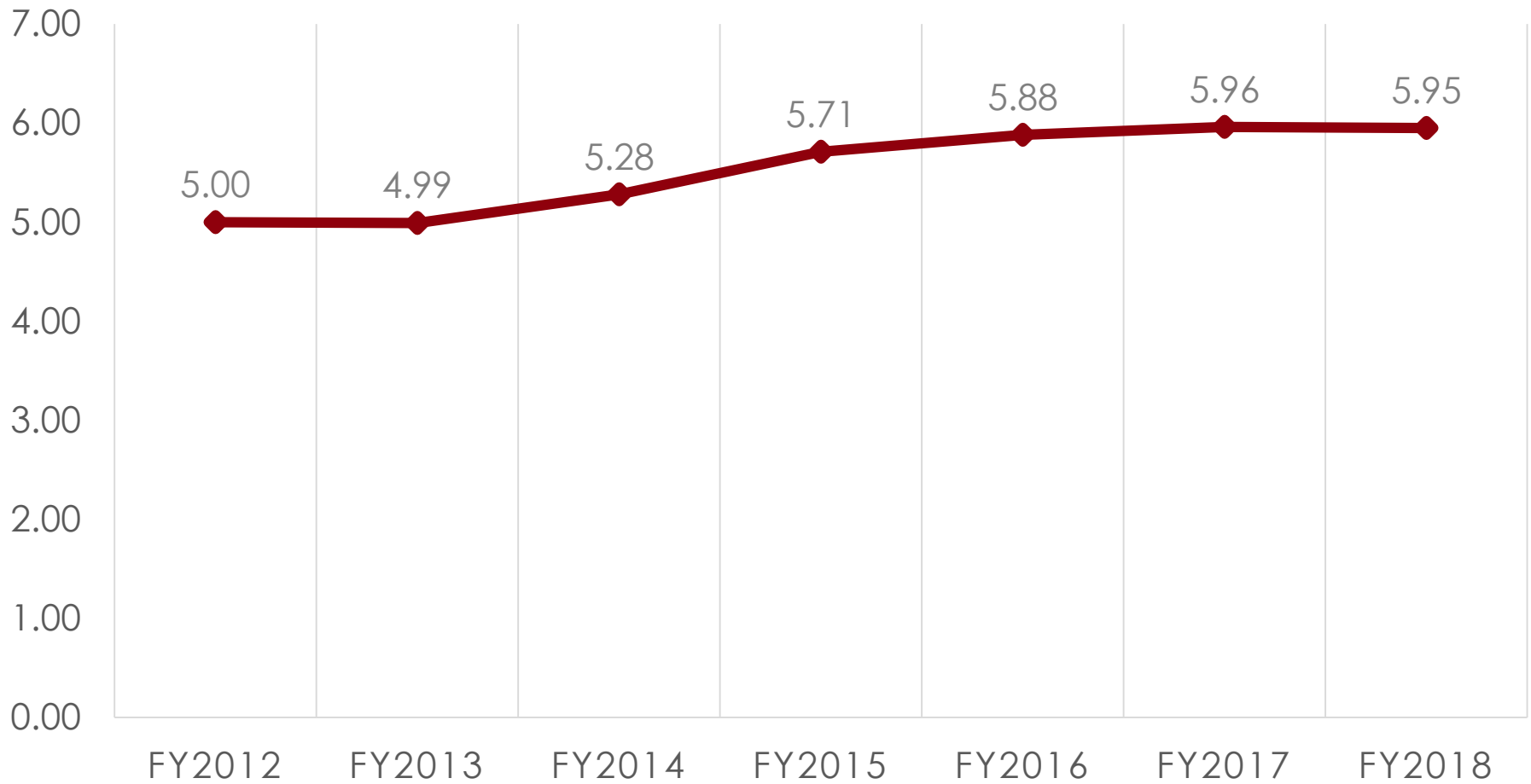
## VISITOR SATISFACTION

### BEHAVIOR

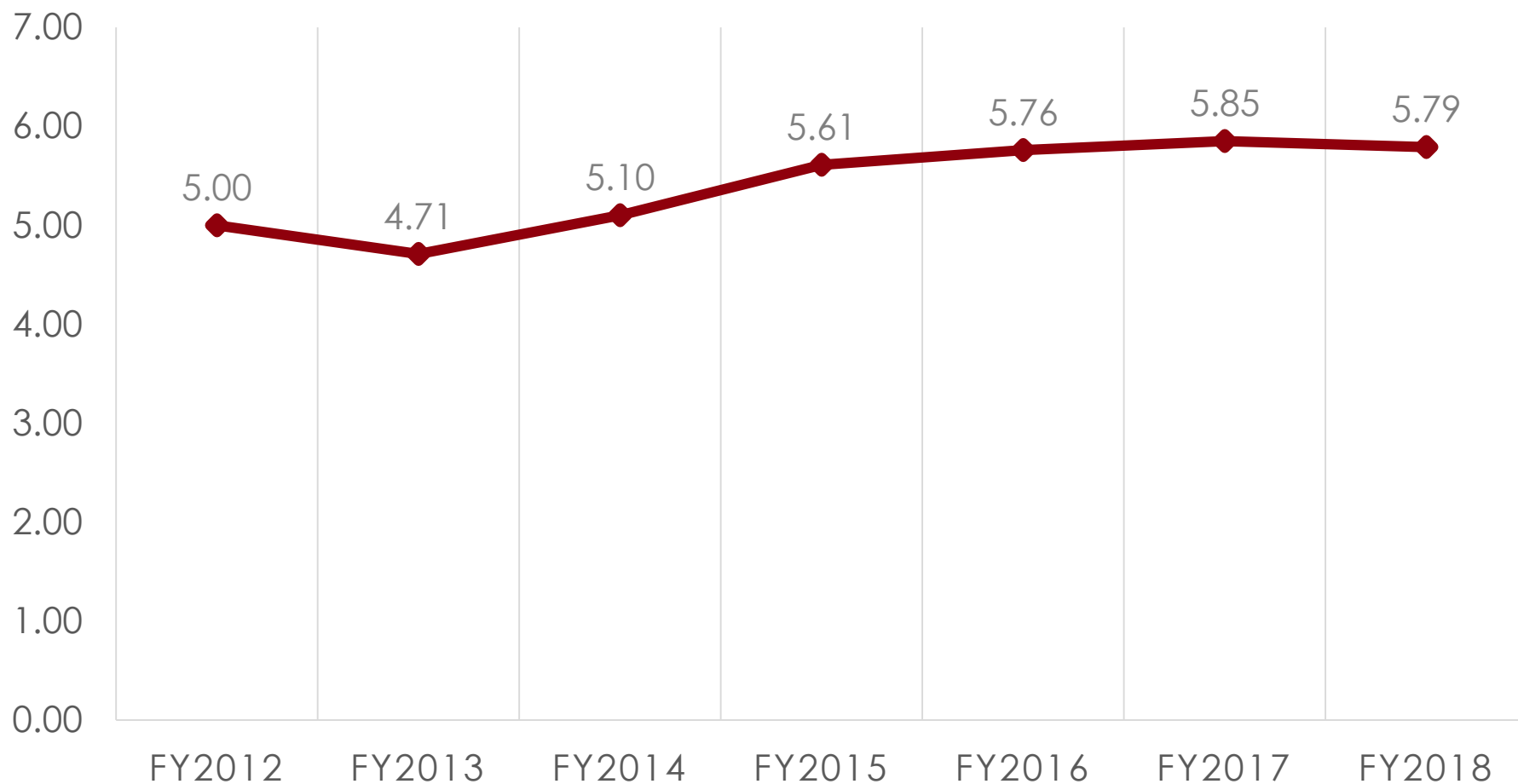
# OVERALL SATISFACTION



# Guam was better than expected



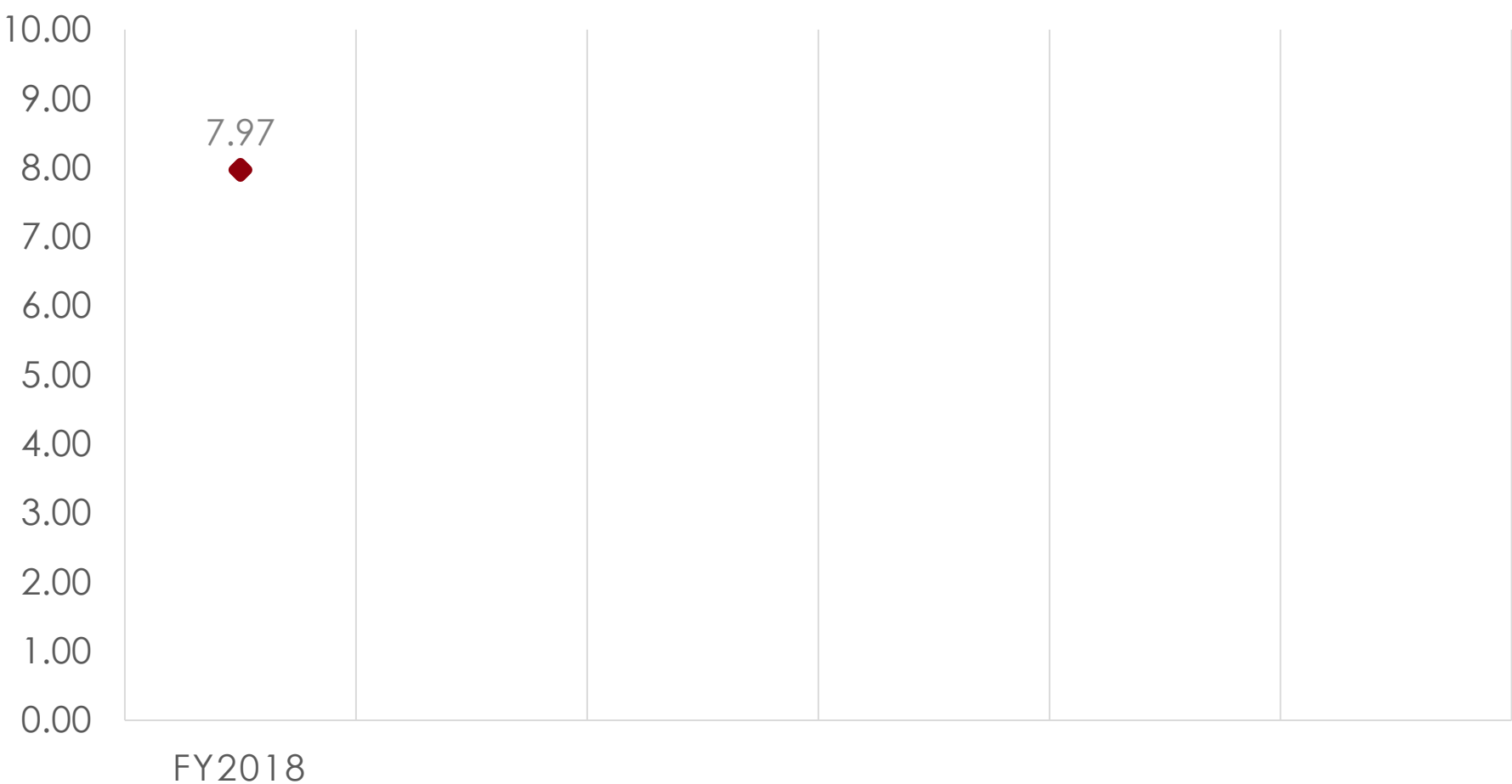
# I had no communication problems



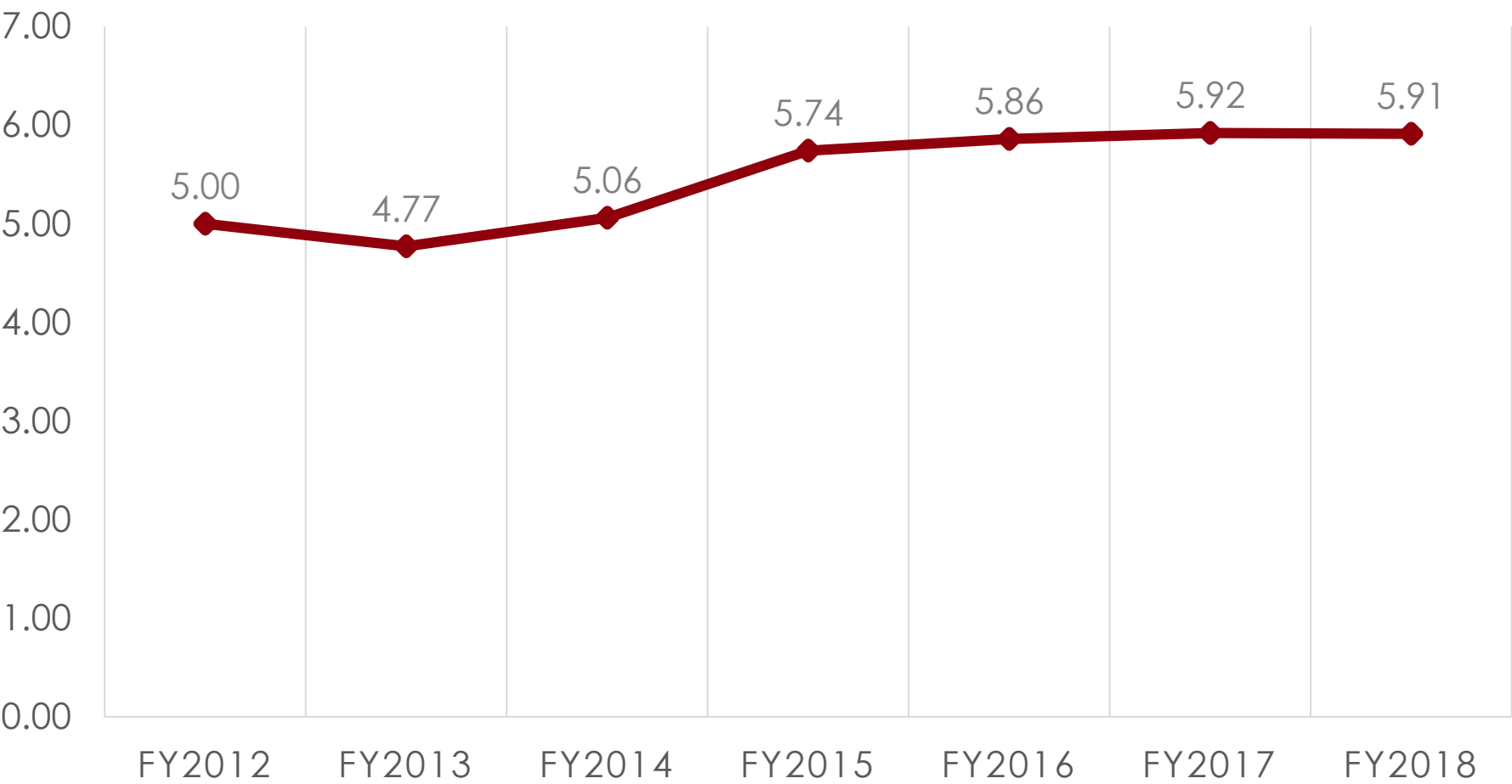


# Recommend Guam - family & friends

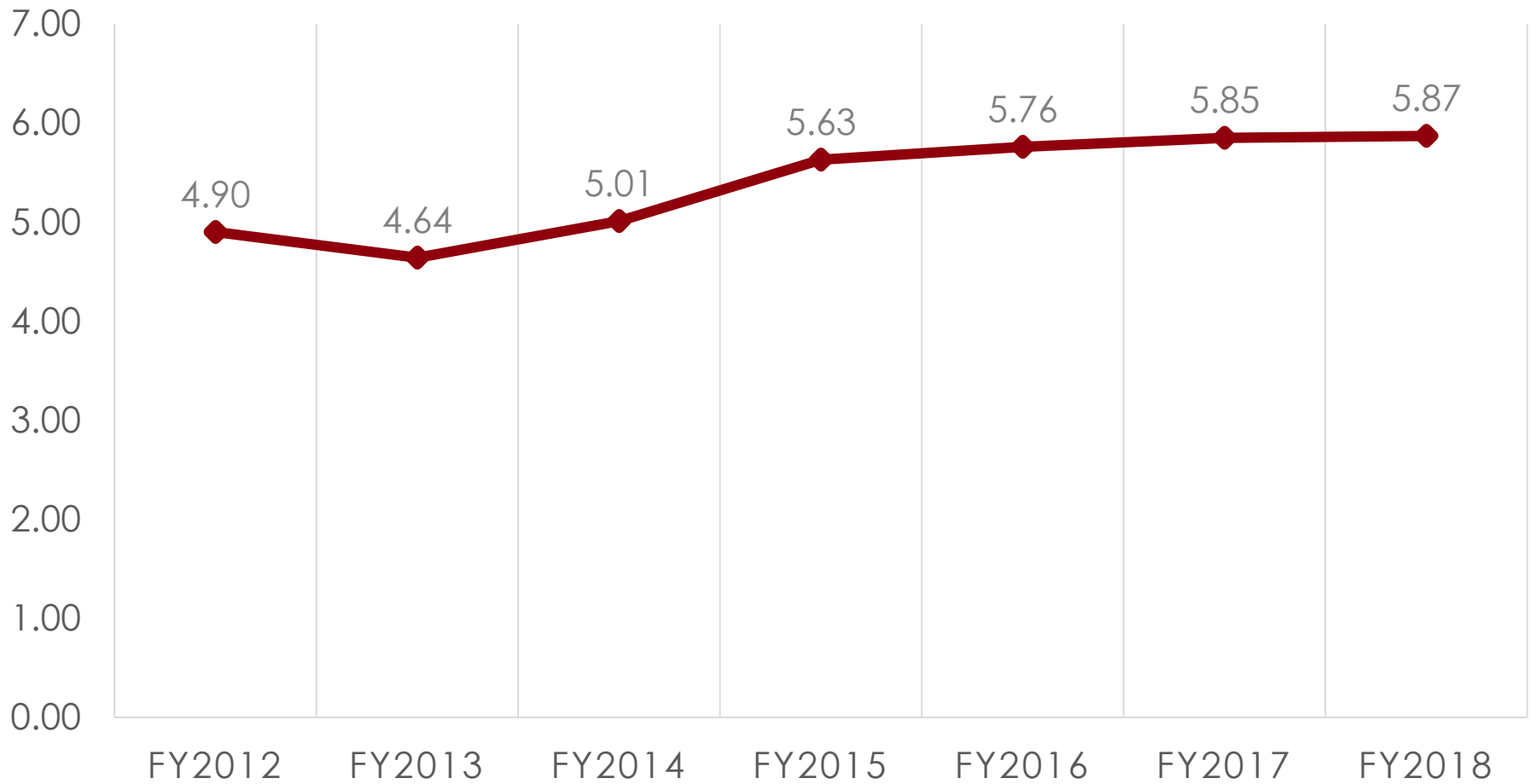
(10pt Scale)



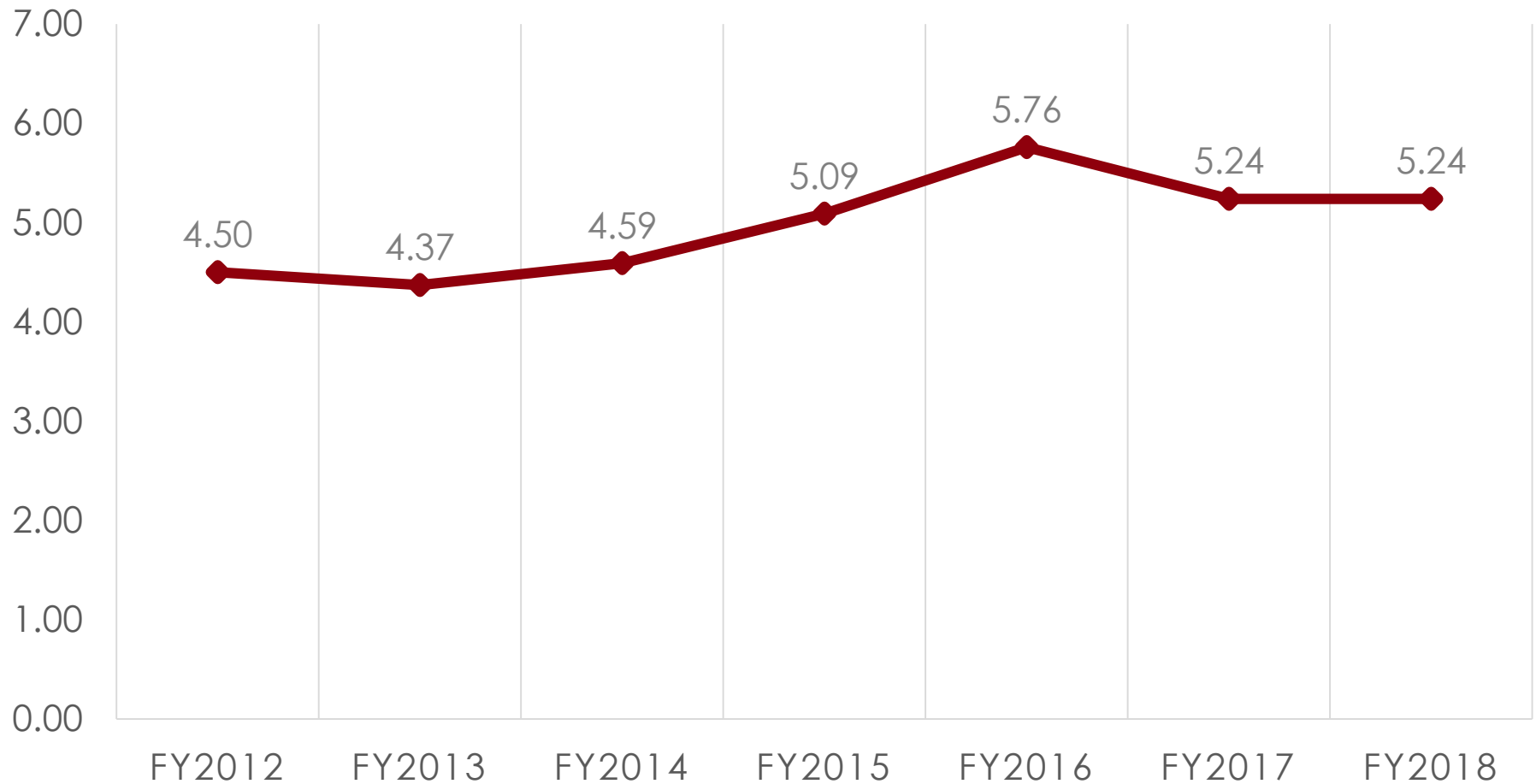
# Sites on Guam were attractive



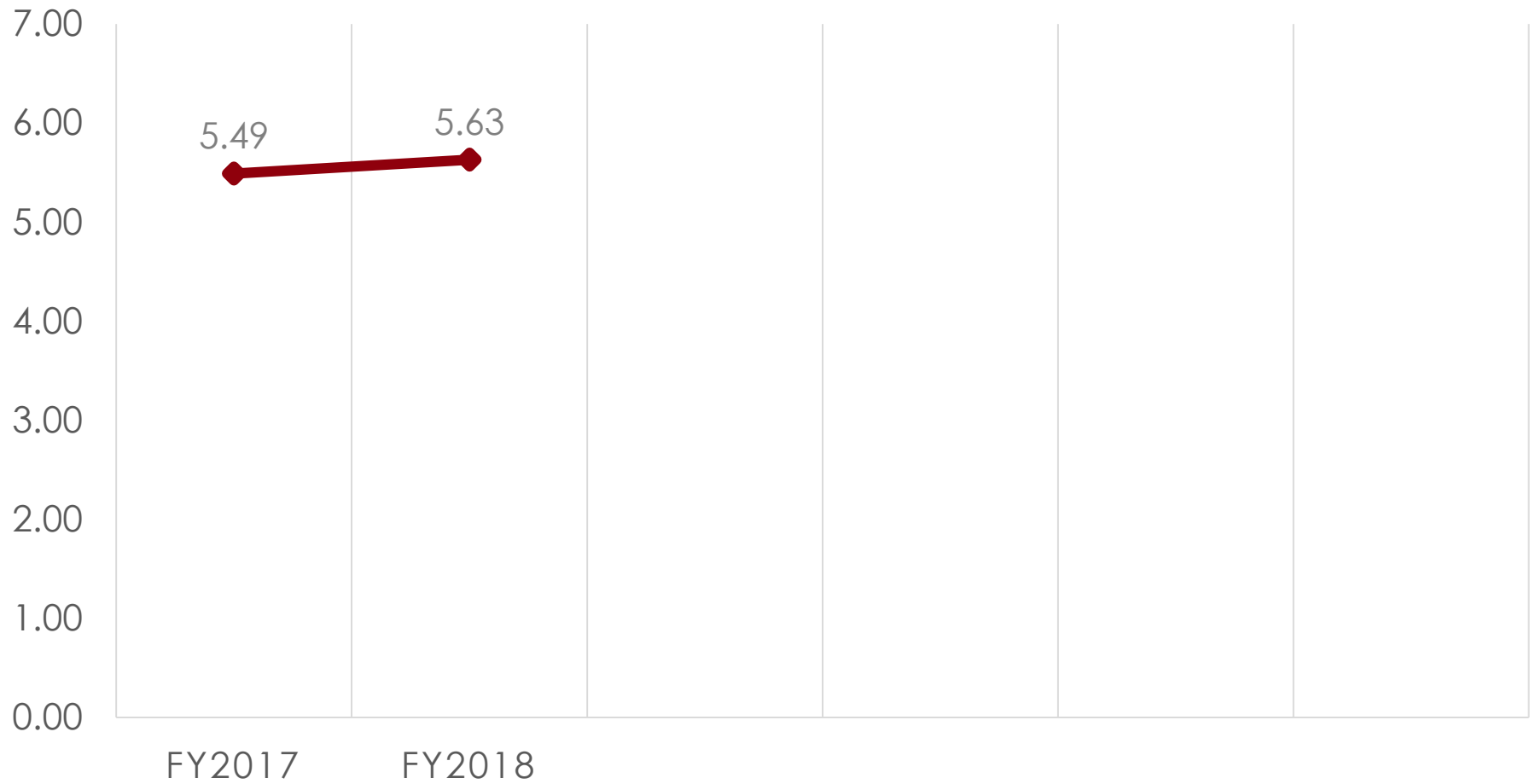
# I plan to visit Guam again



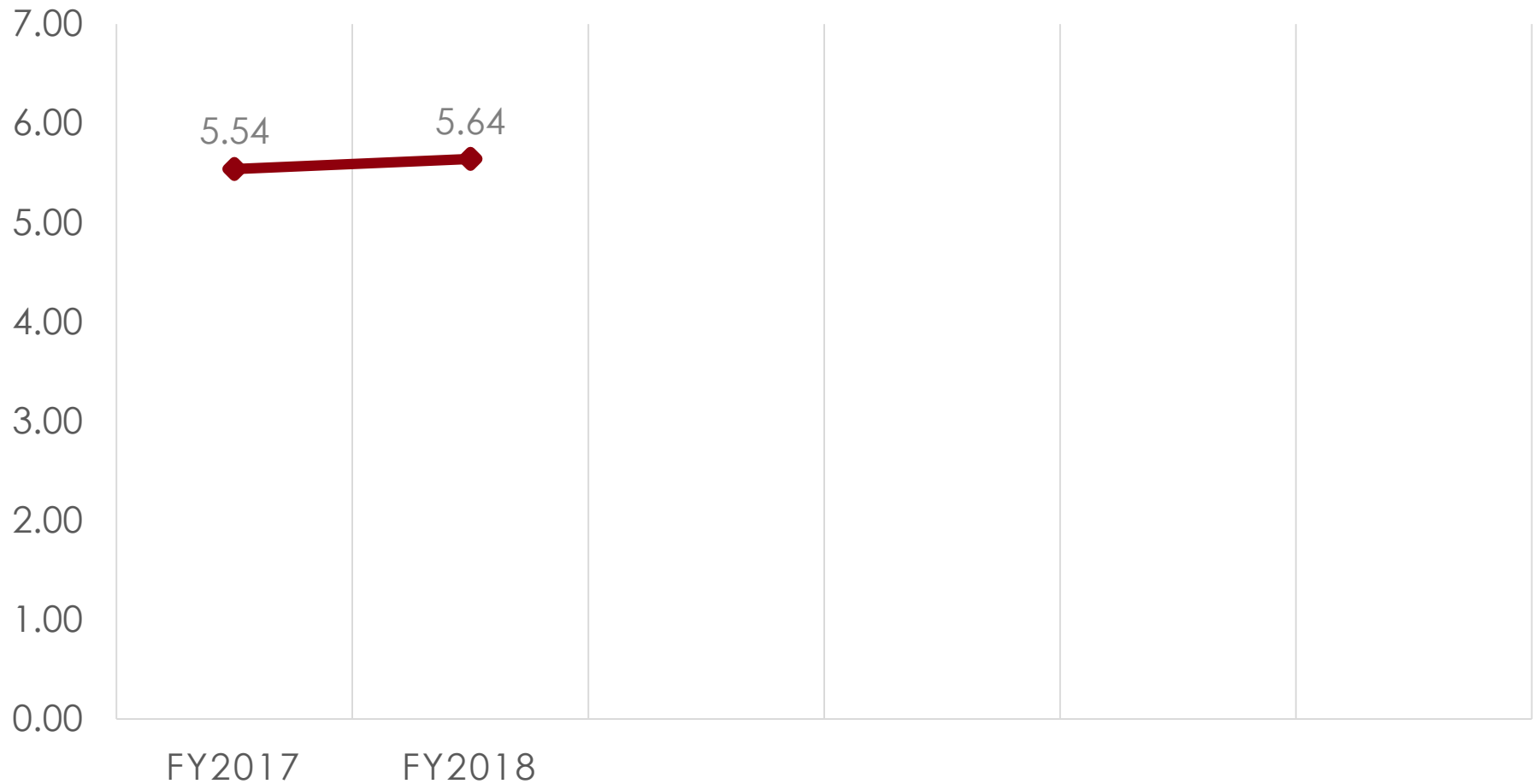
# Not enough night time activities



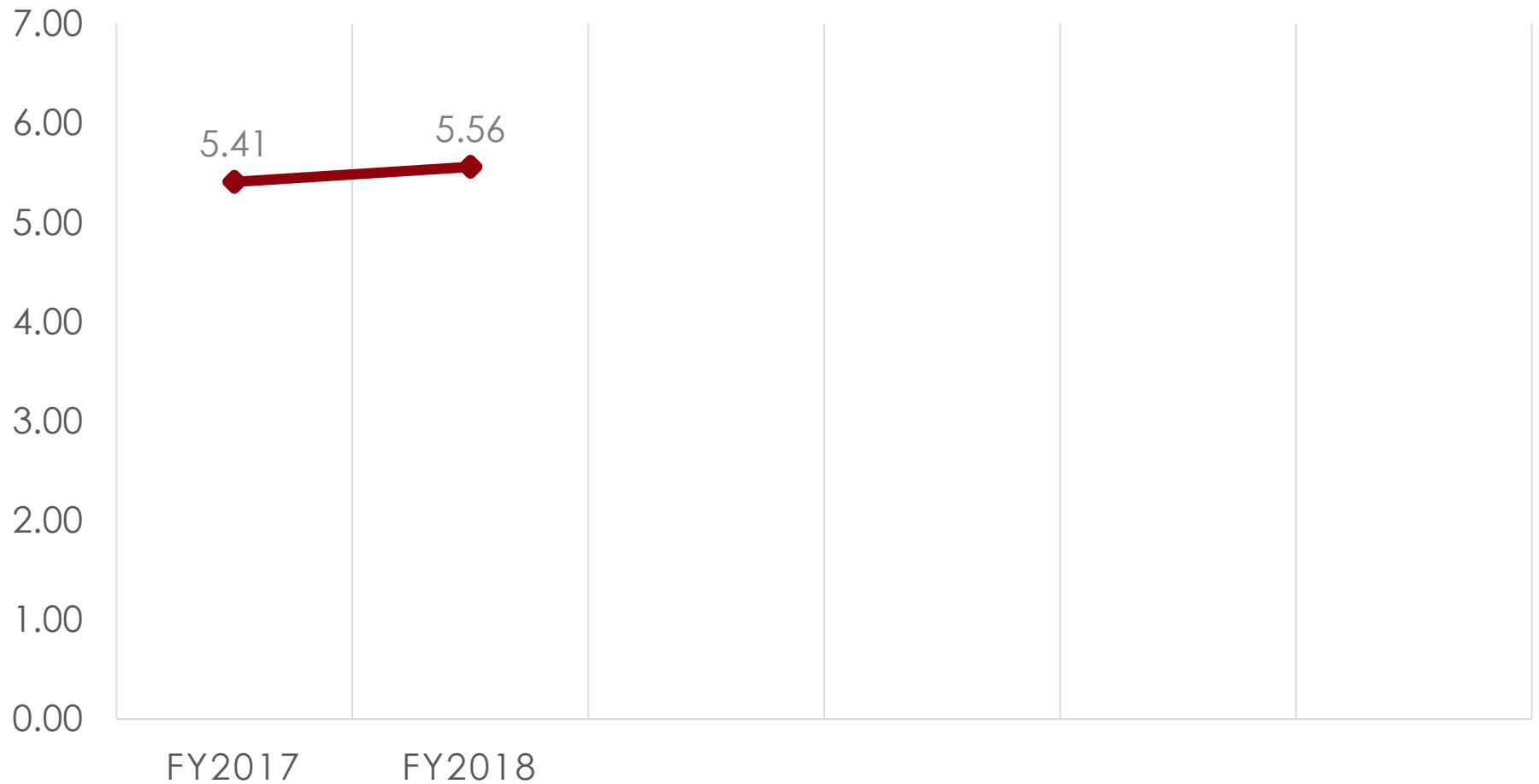
# Tour guides were professional



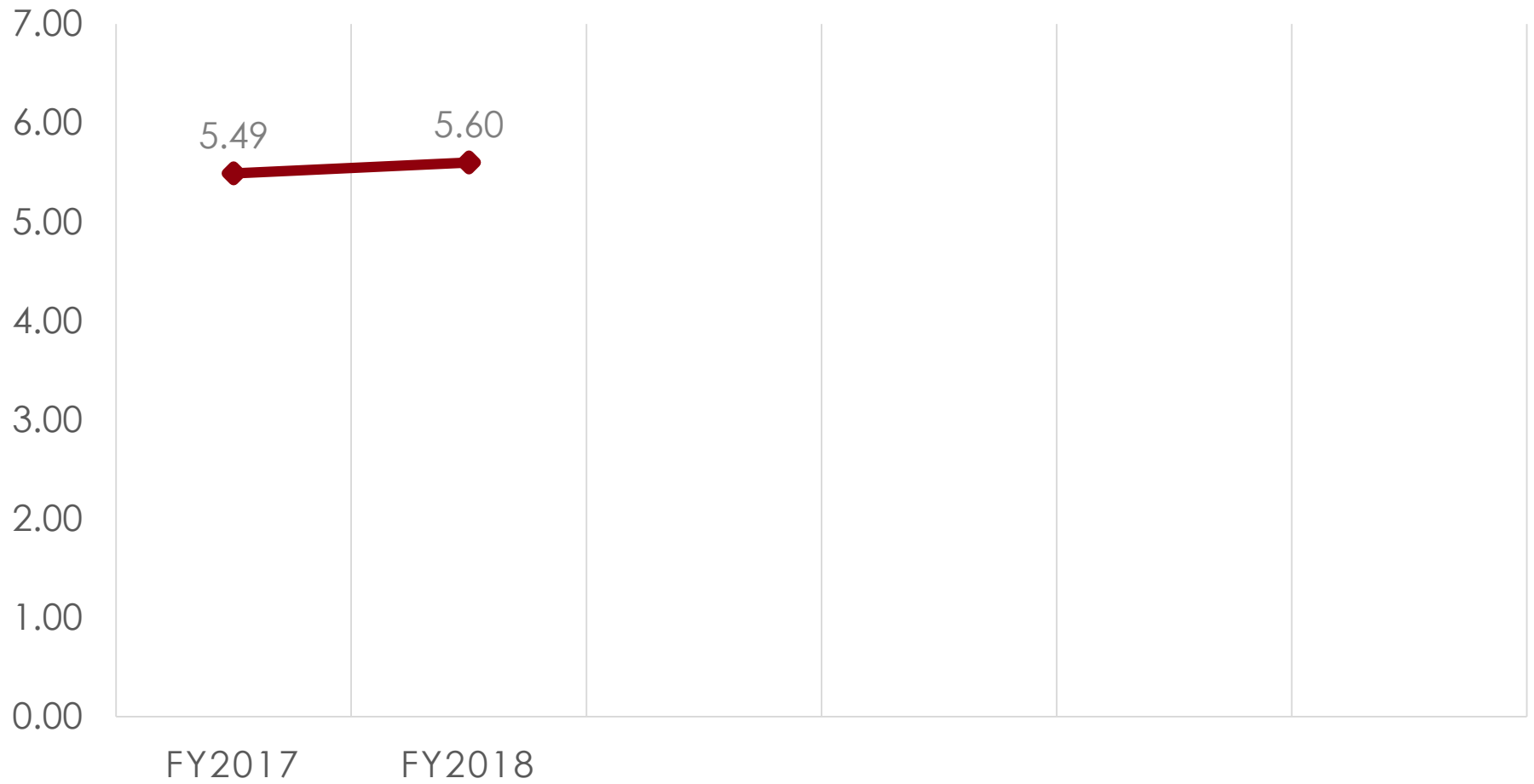
# Tour drivers were professional



# Taxi drivers were professional

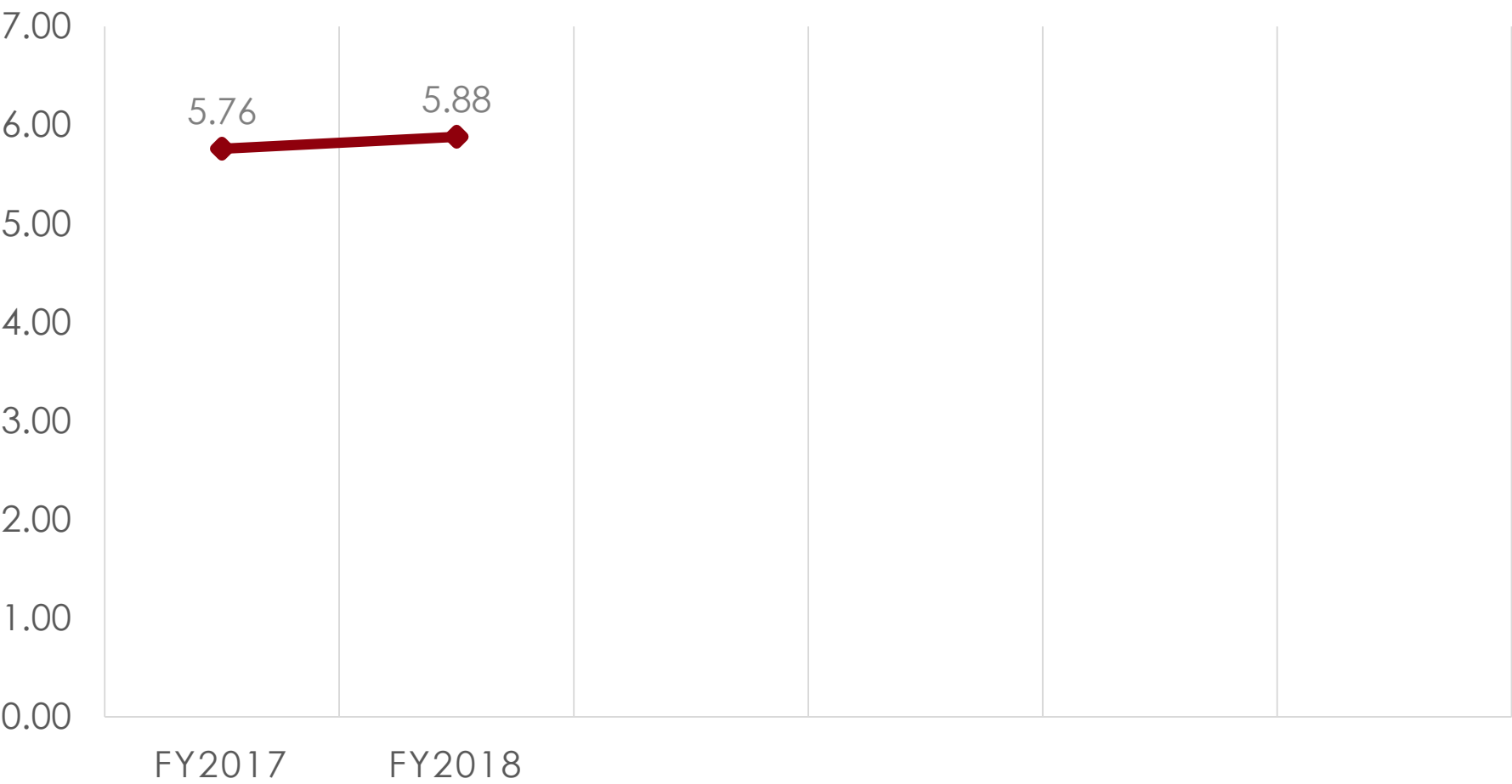


# Taxis were clean

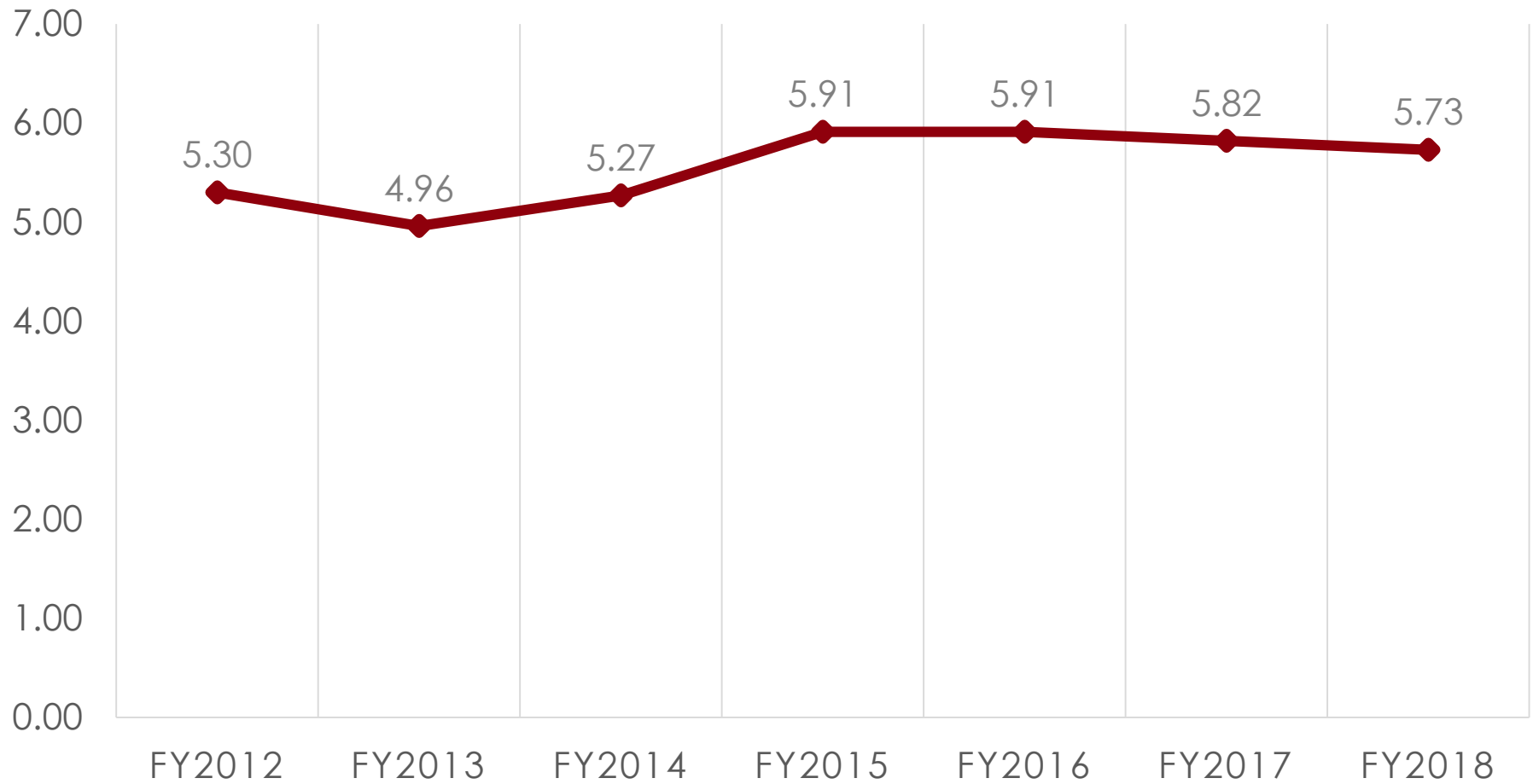




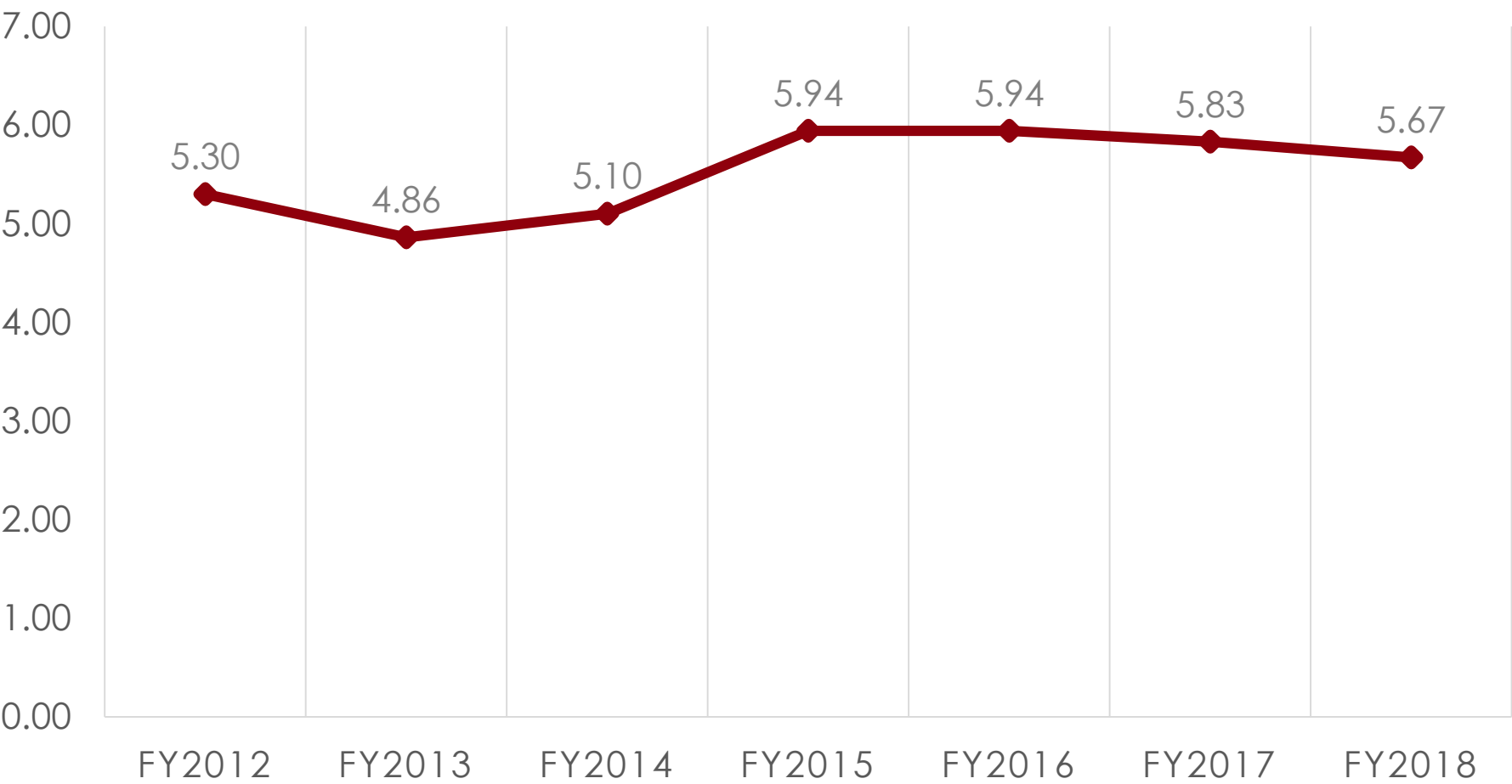
# Guam airport was clean



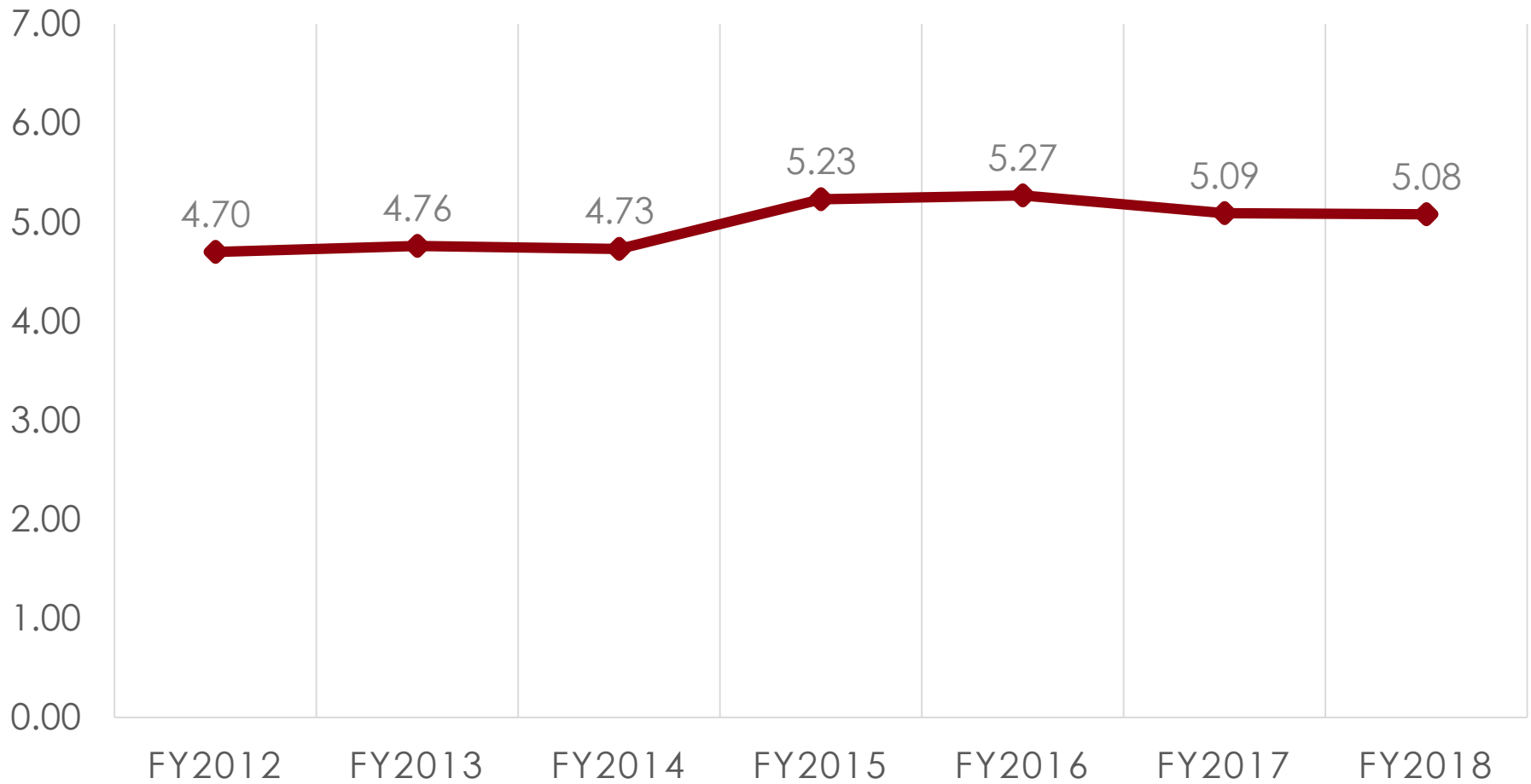
# Ease of getting around



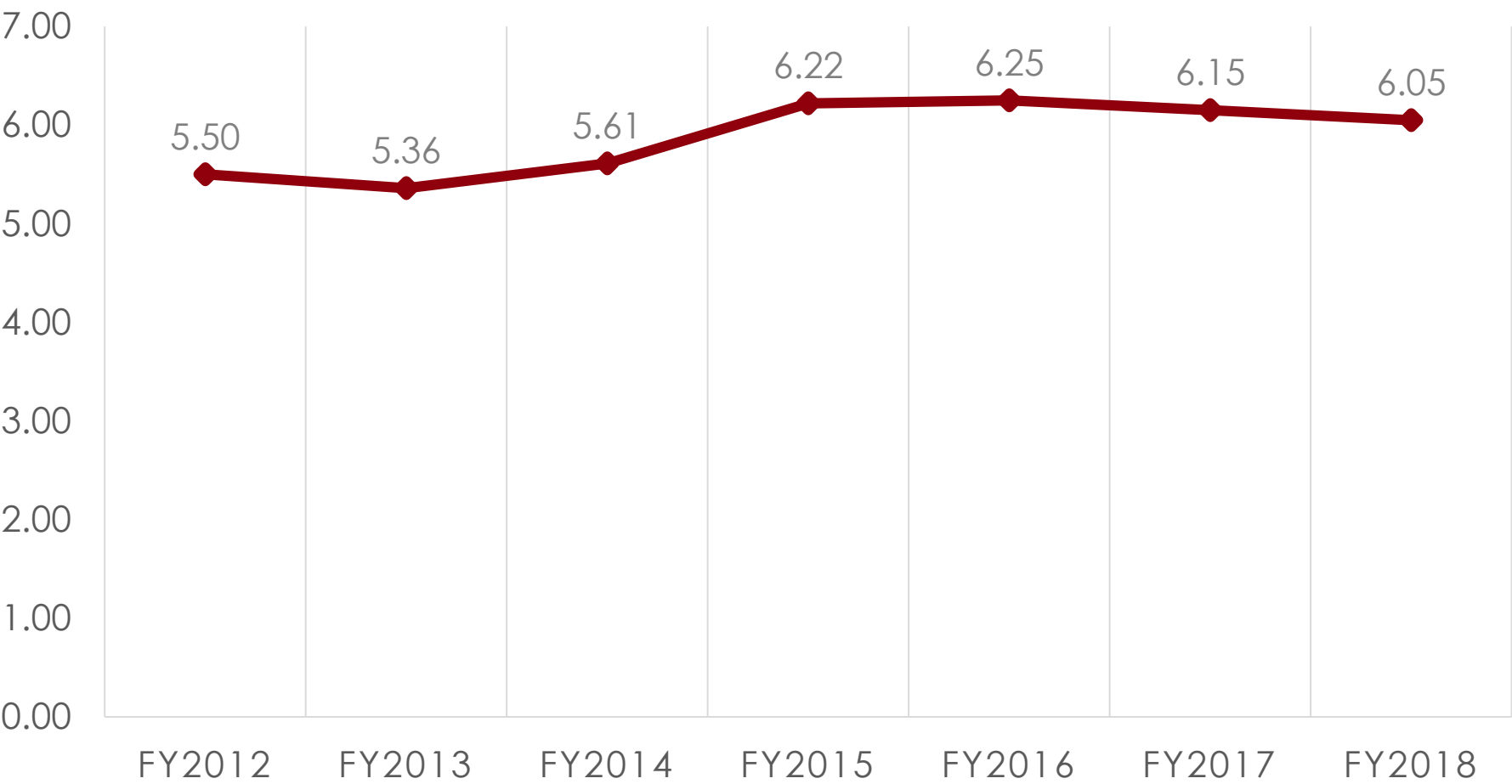
# Safety walking around at night



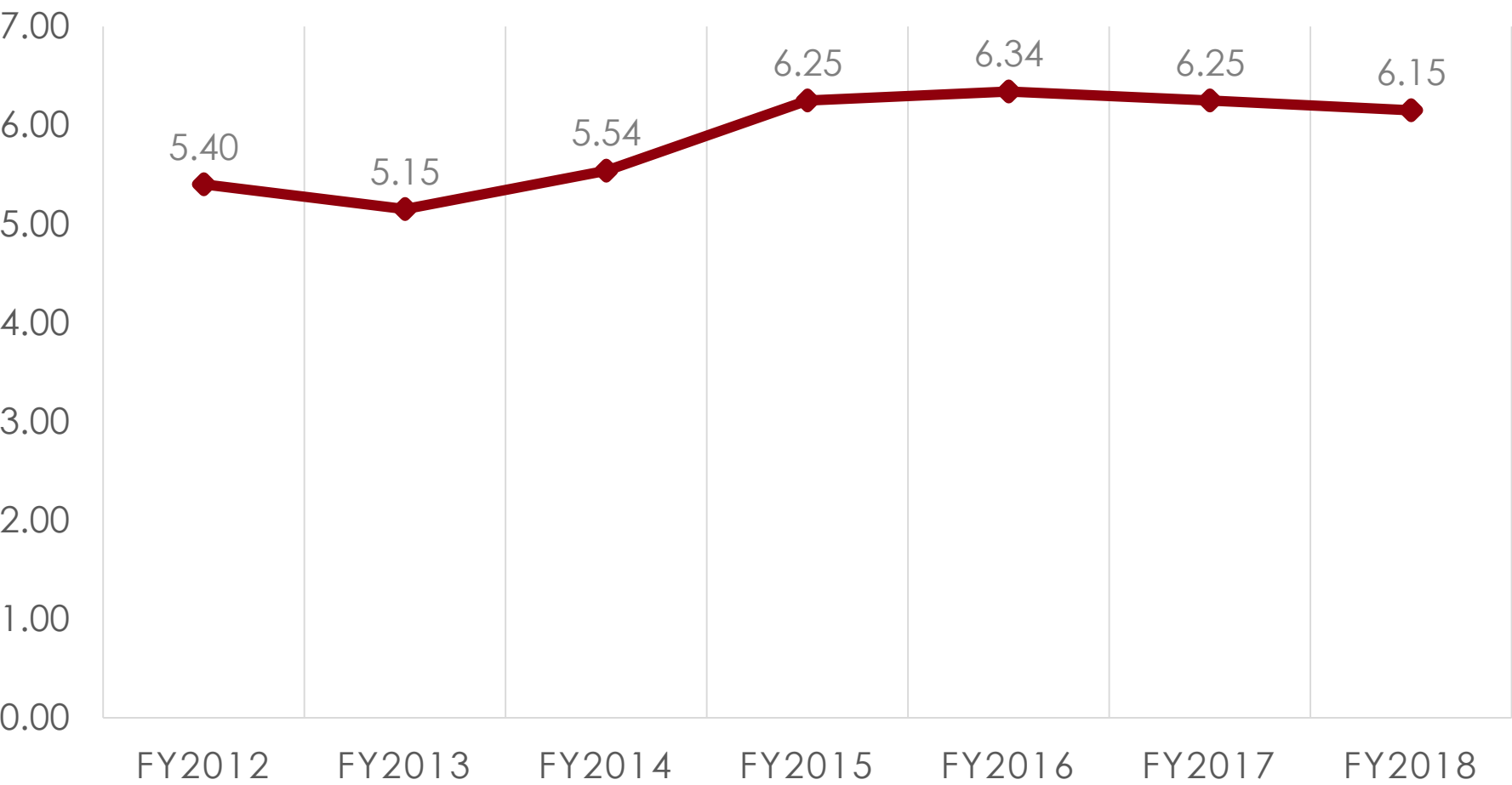
# Price of things on Guam



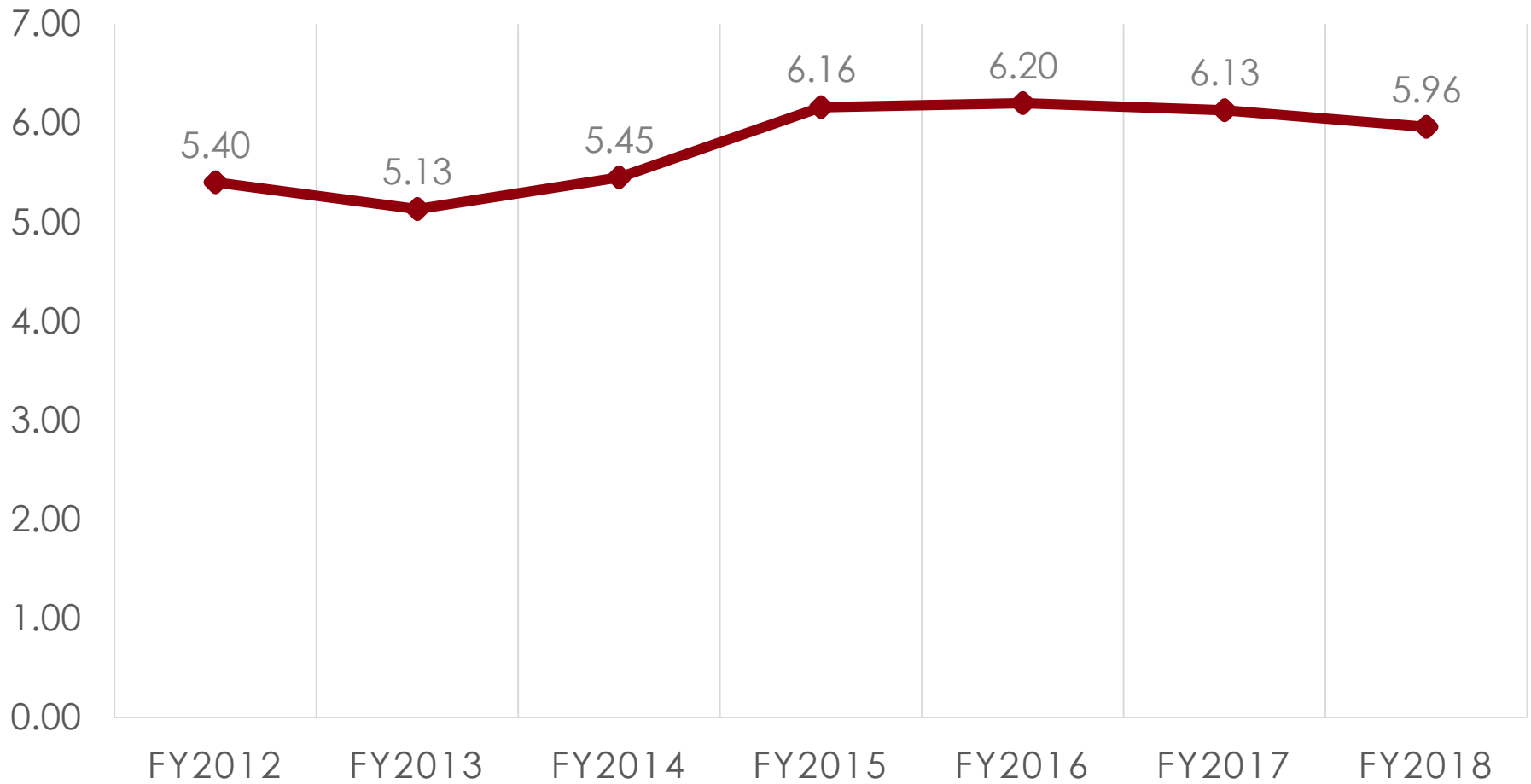
# Quality/ Cleanliness- beach, ocean



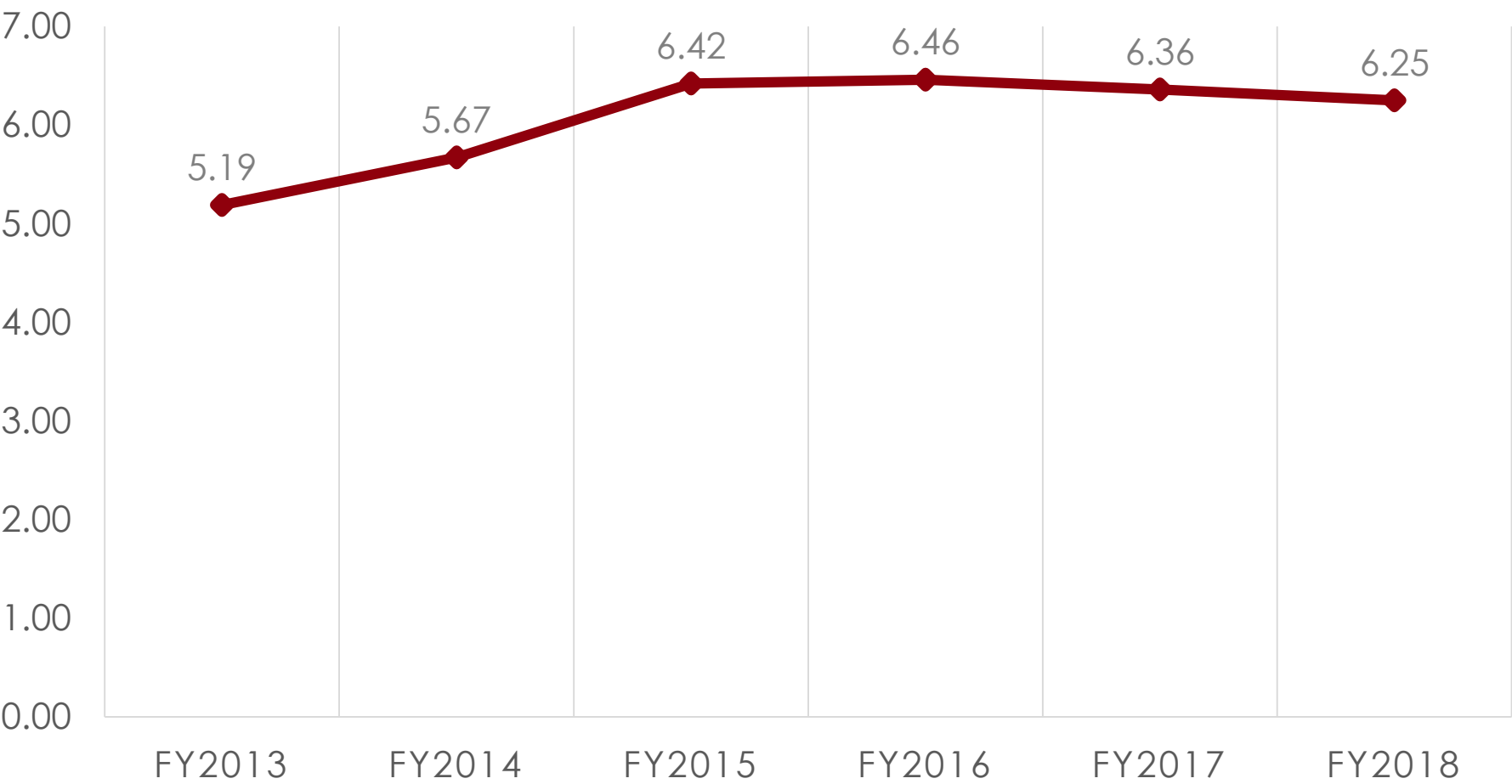
# Quality/ Cleanliness- air, sky



# Quality/ Cleanliness- parks

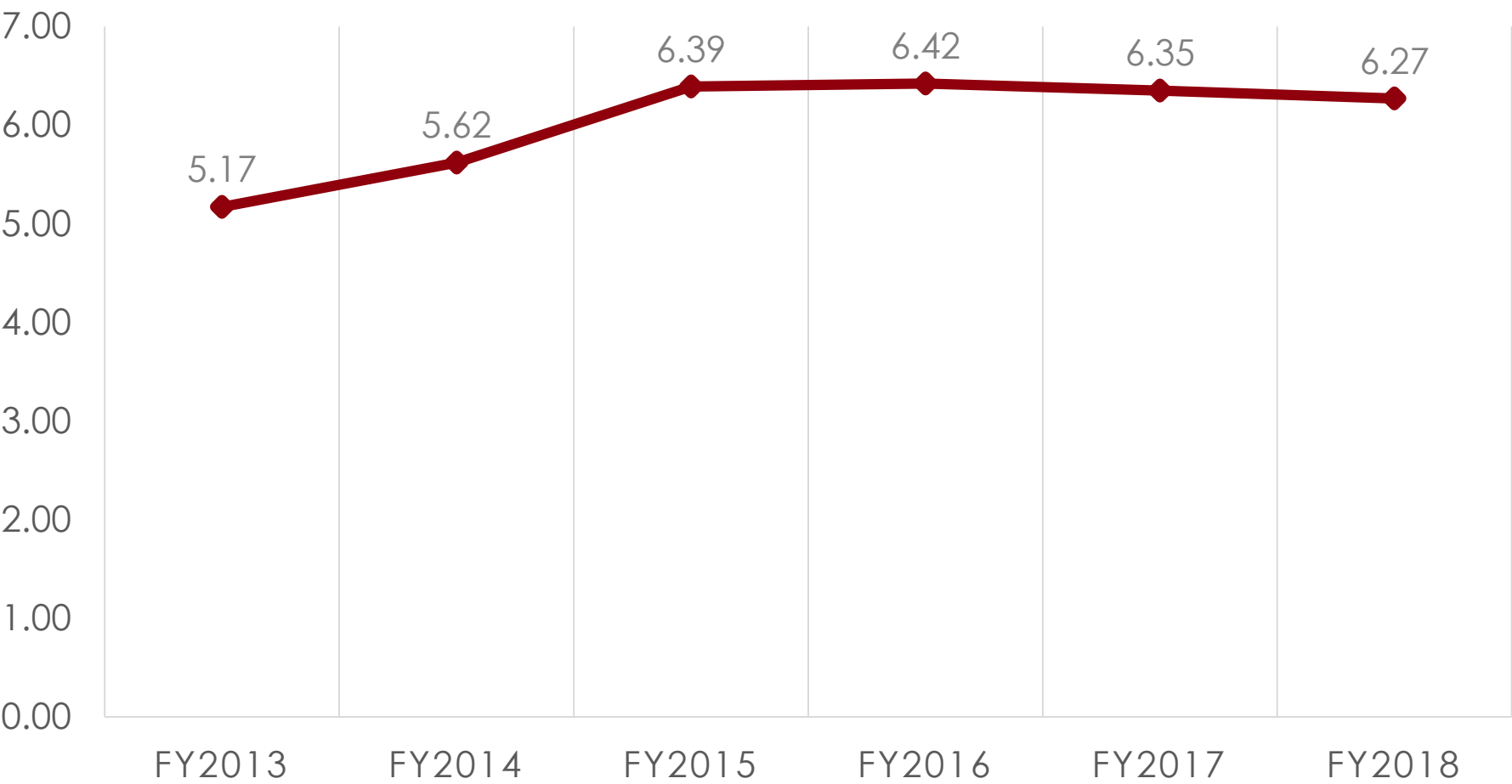


# Quality- landscape Tumon

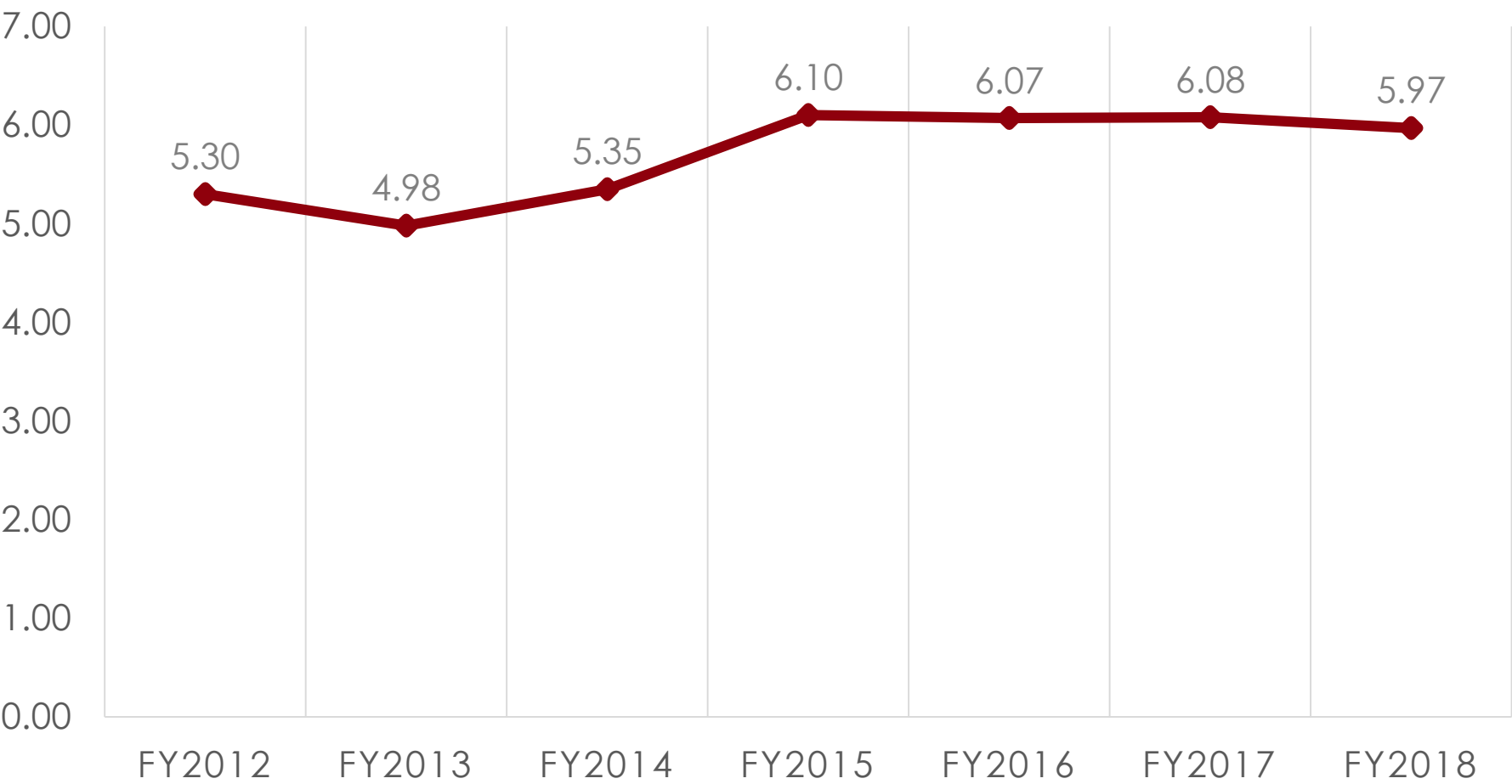




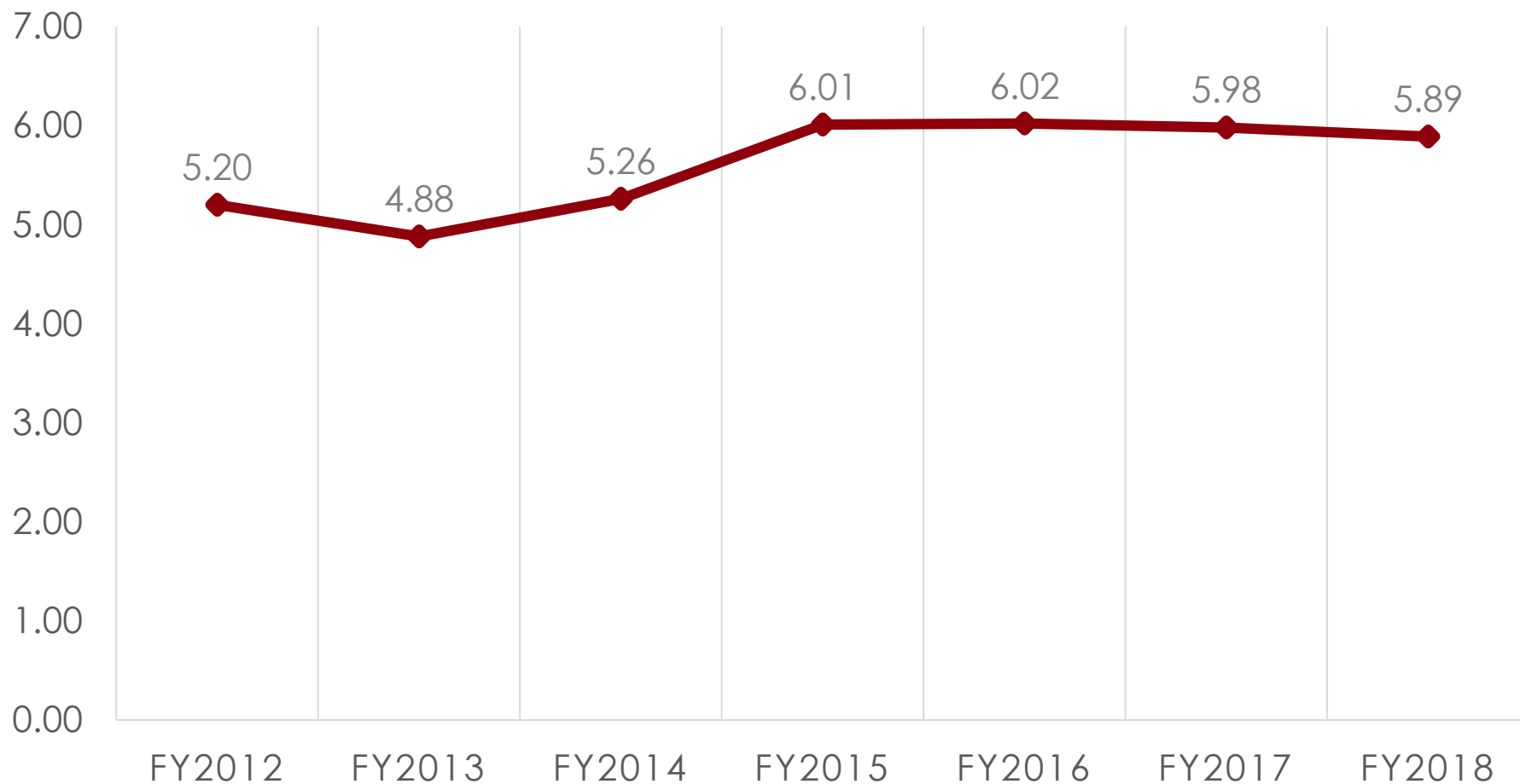
# Quality- landscape Guam



# Quality- ground handler

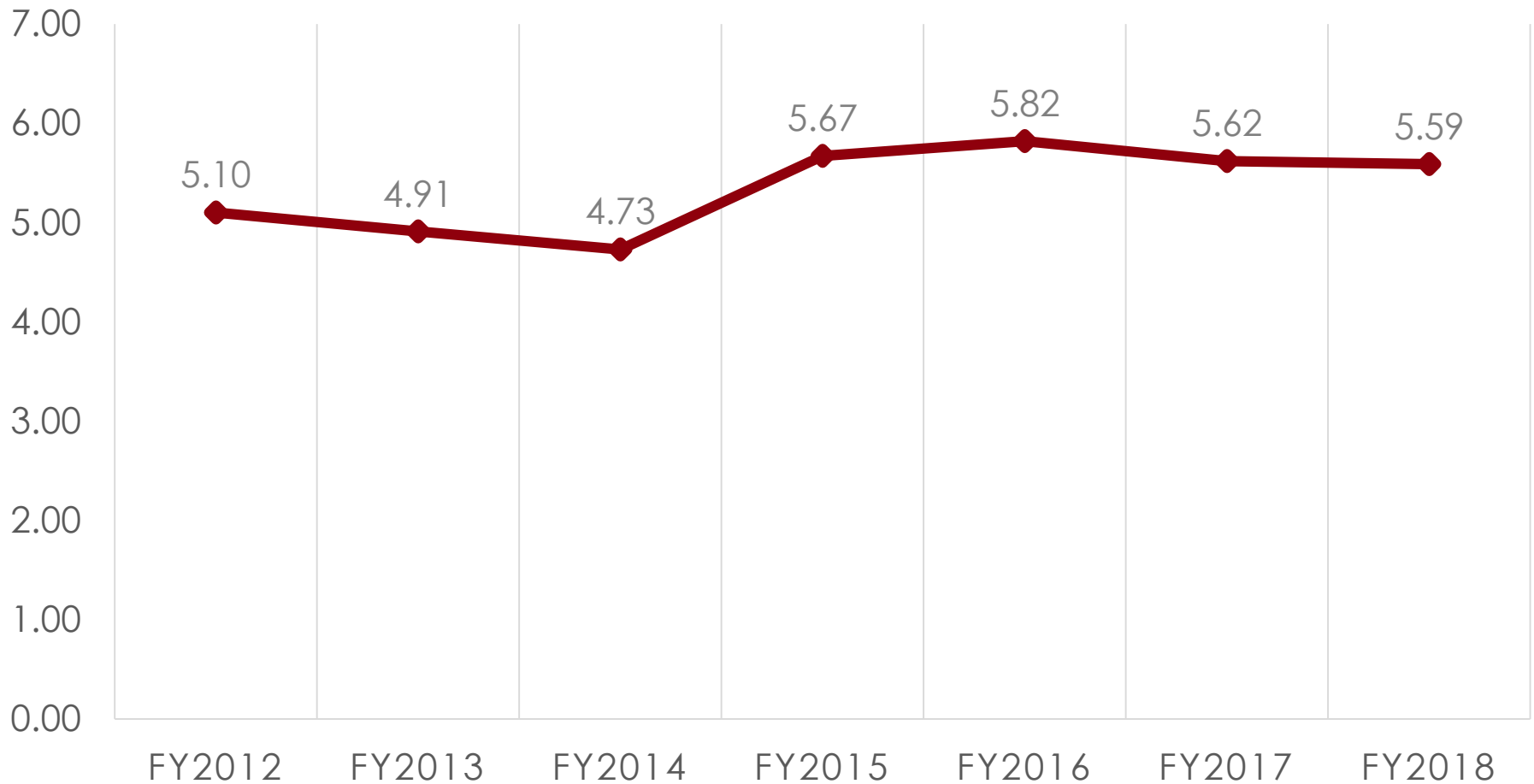


# Quality/ Cleanliness- transportation vehicle

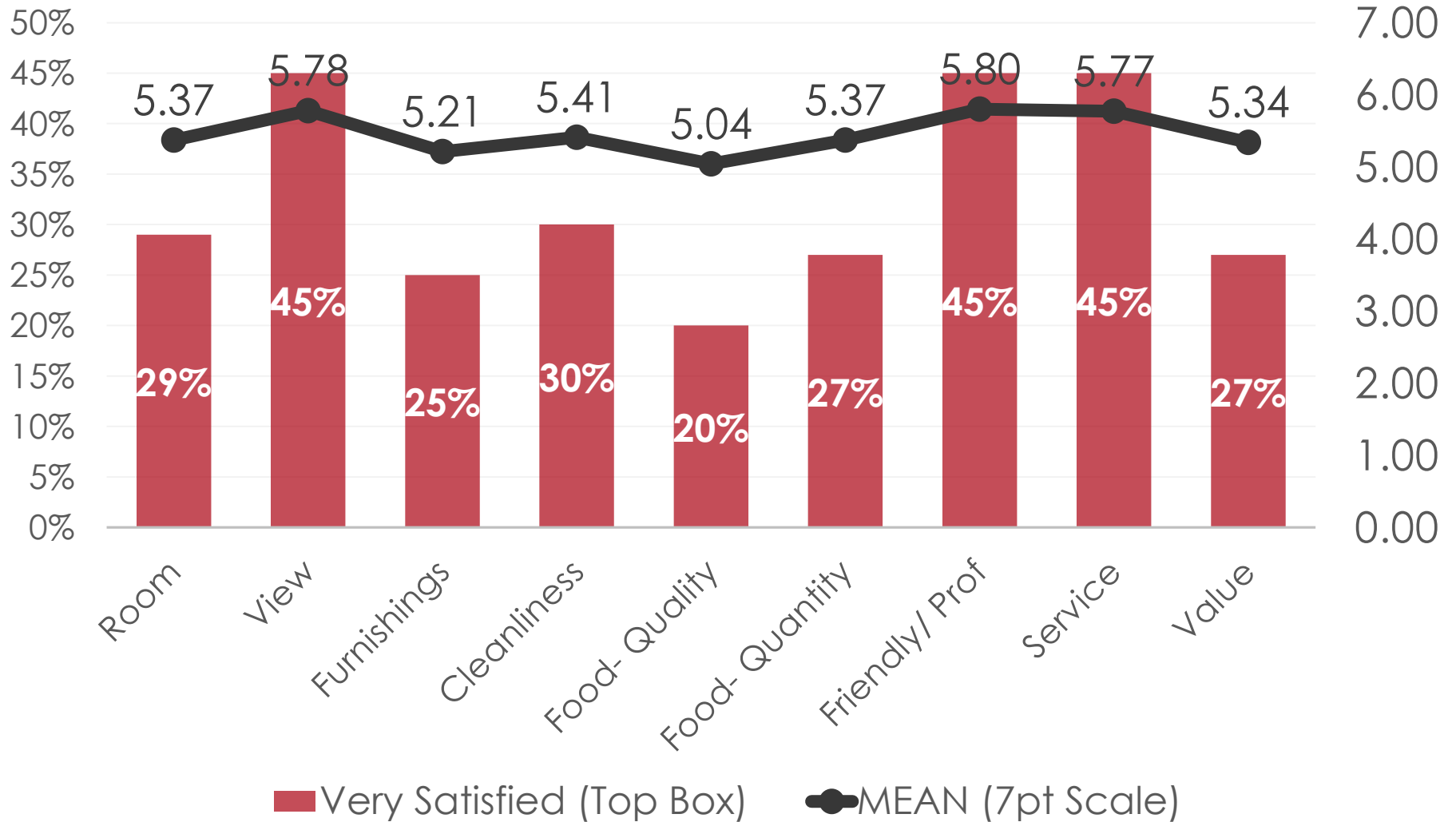


# ACCOMMODATIONS

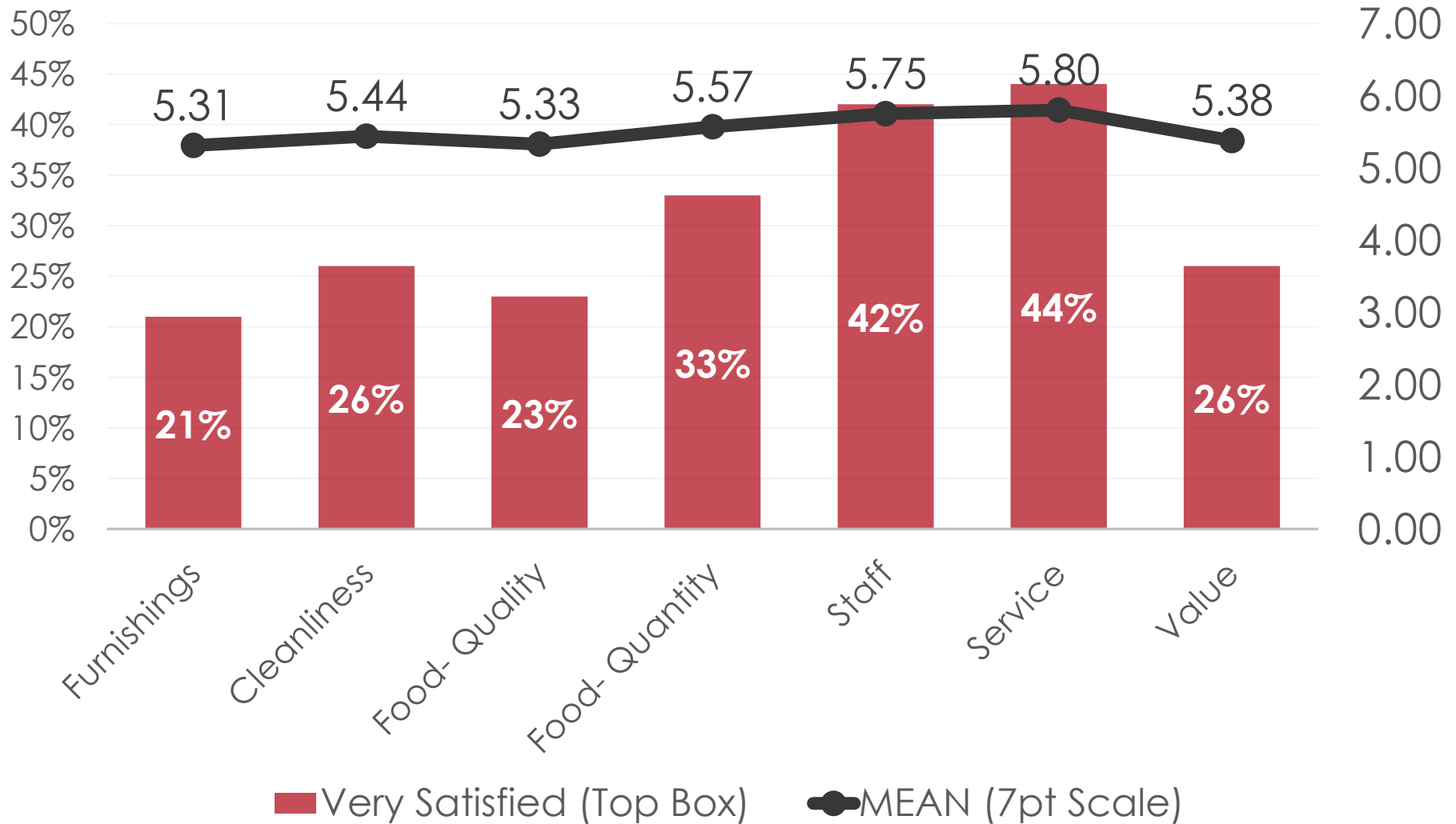
## OVERALL SATISFACTION



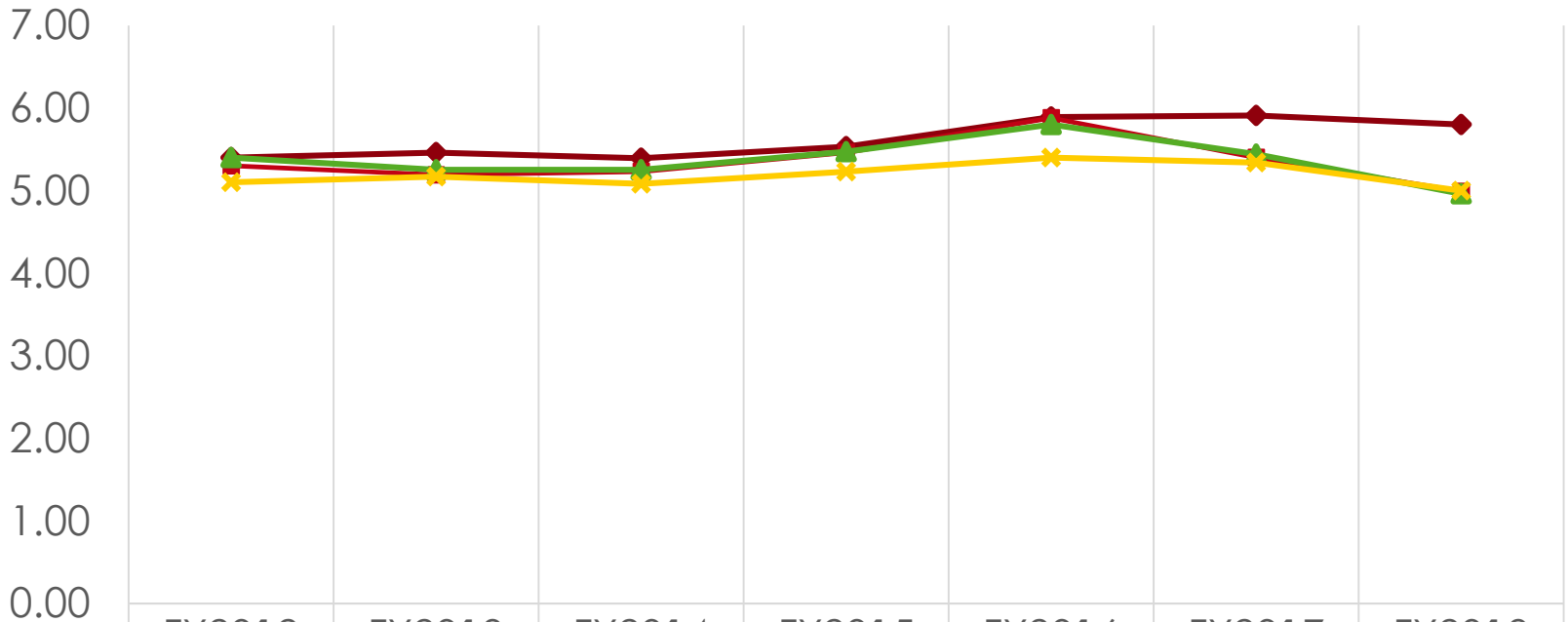
# ACCOMMODATIONS – Satisfaction by Category



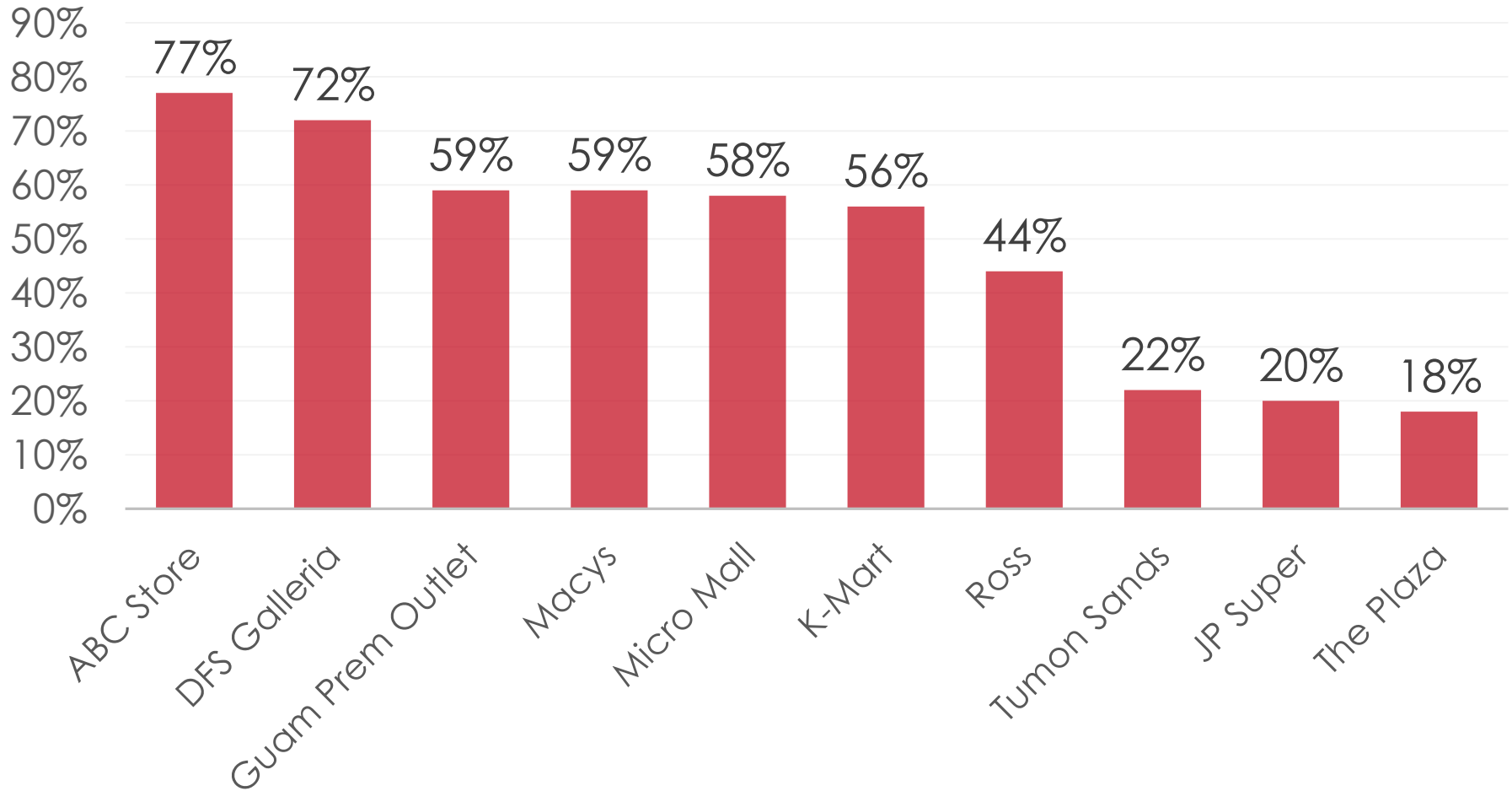
# DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



# WEDDINGS - SATISFACTION



# Shopping Malls/ Stores (Top Responses)



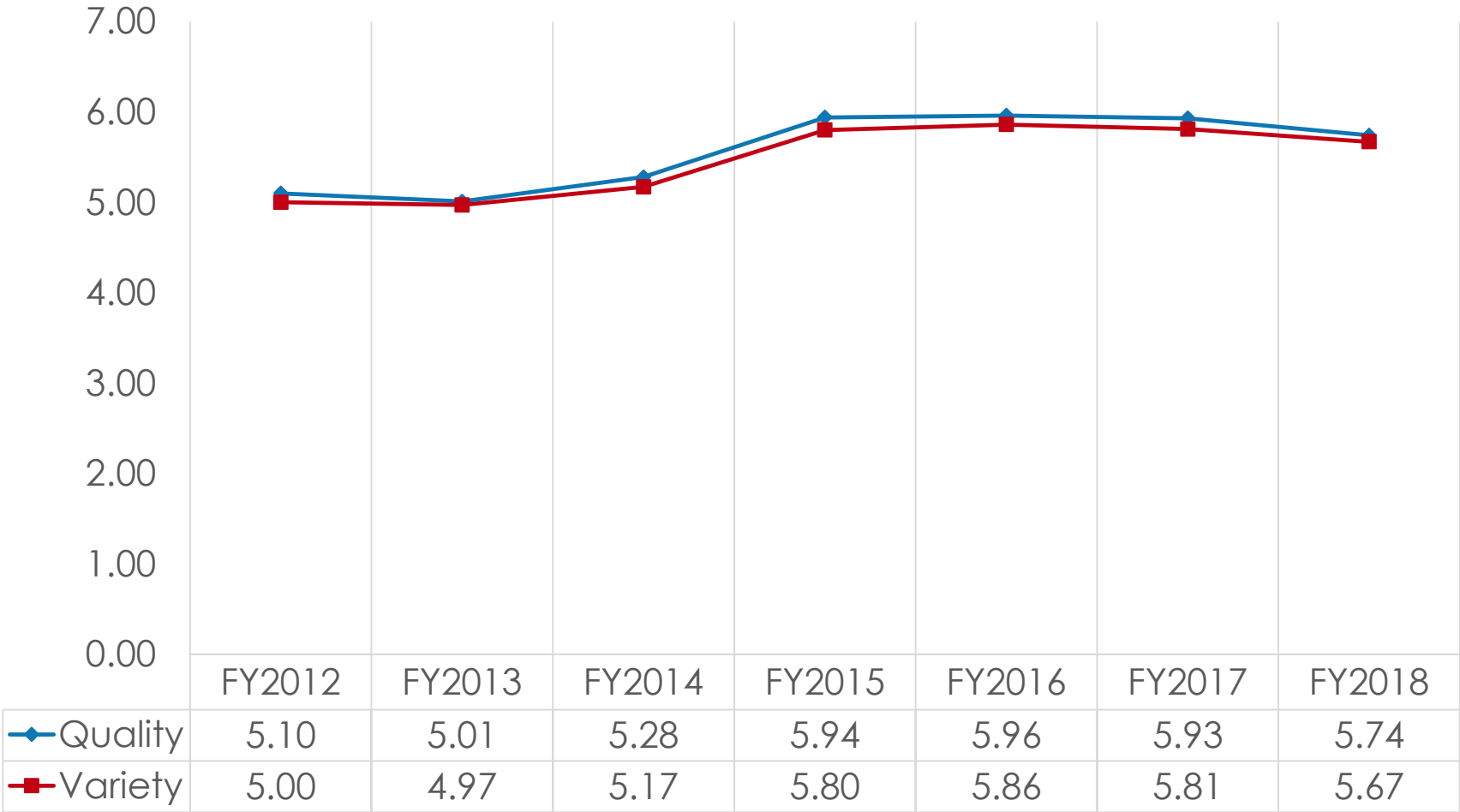


# Shopping Malls/ Stores (Top Responses)

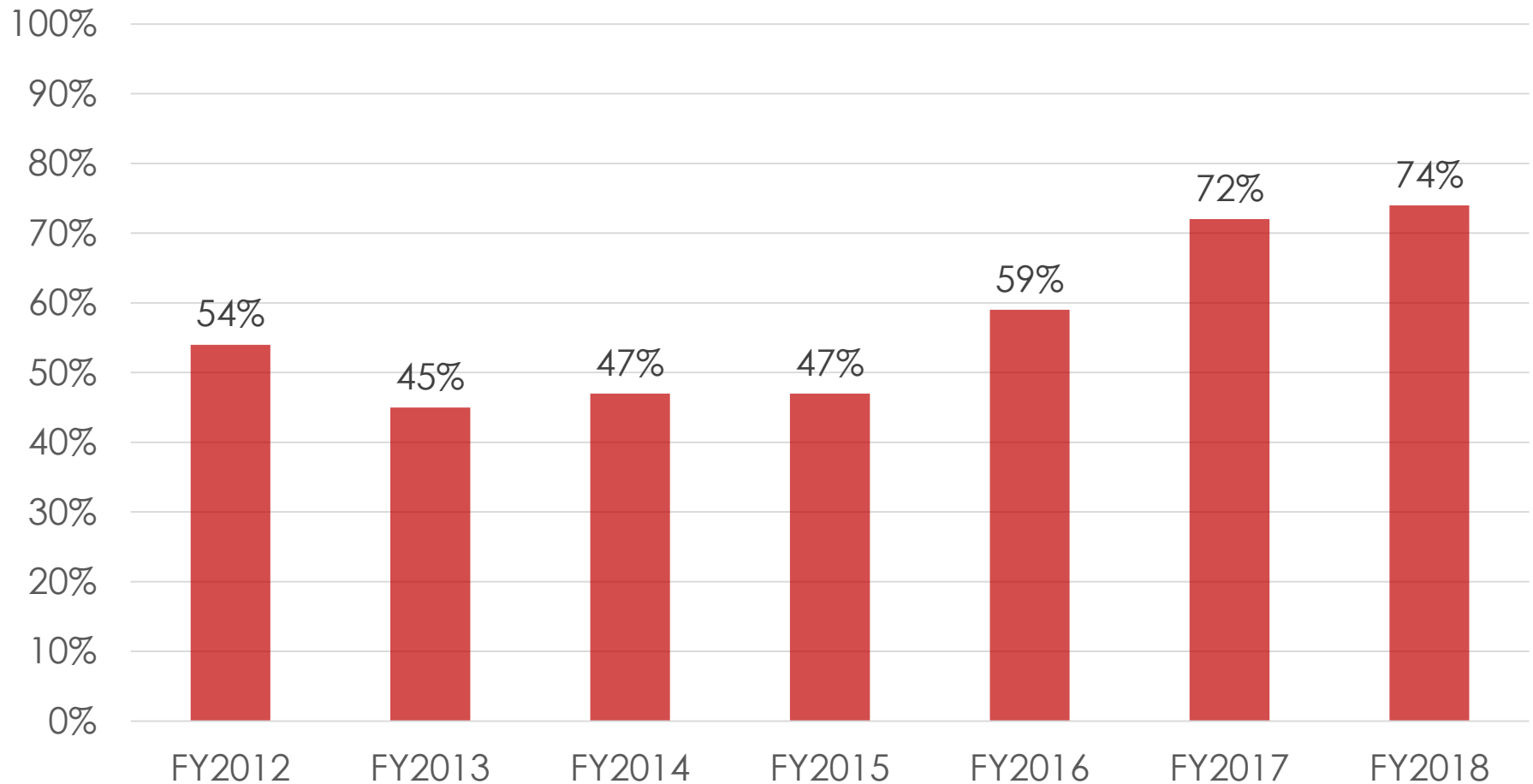
FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
76% ABC 71% DFS 68% K-Mart	63% DFS 61% ABC 44% K-Mart	75% DFS 66% ABC 52% K-Mart	92% ABC 82% DFS 76% Premier Outlet	88% ABC 78% DFS 70% Premier Outlet	85% ABC 67% DFS 67% Premier Outlet

FY2018
77% ABC 72% DFS 59% Macy's 59% Premier Outlet

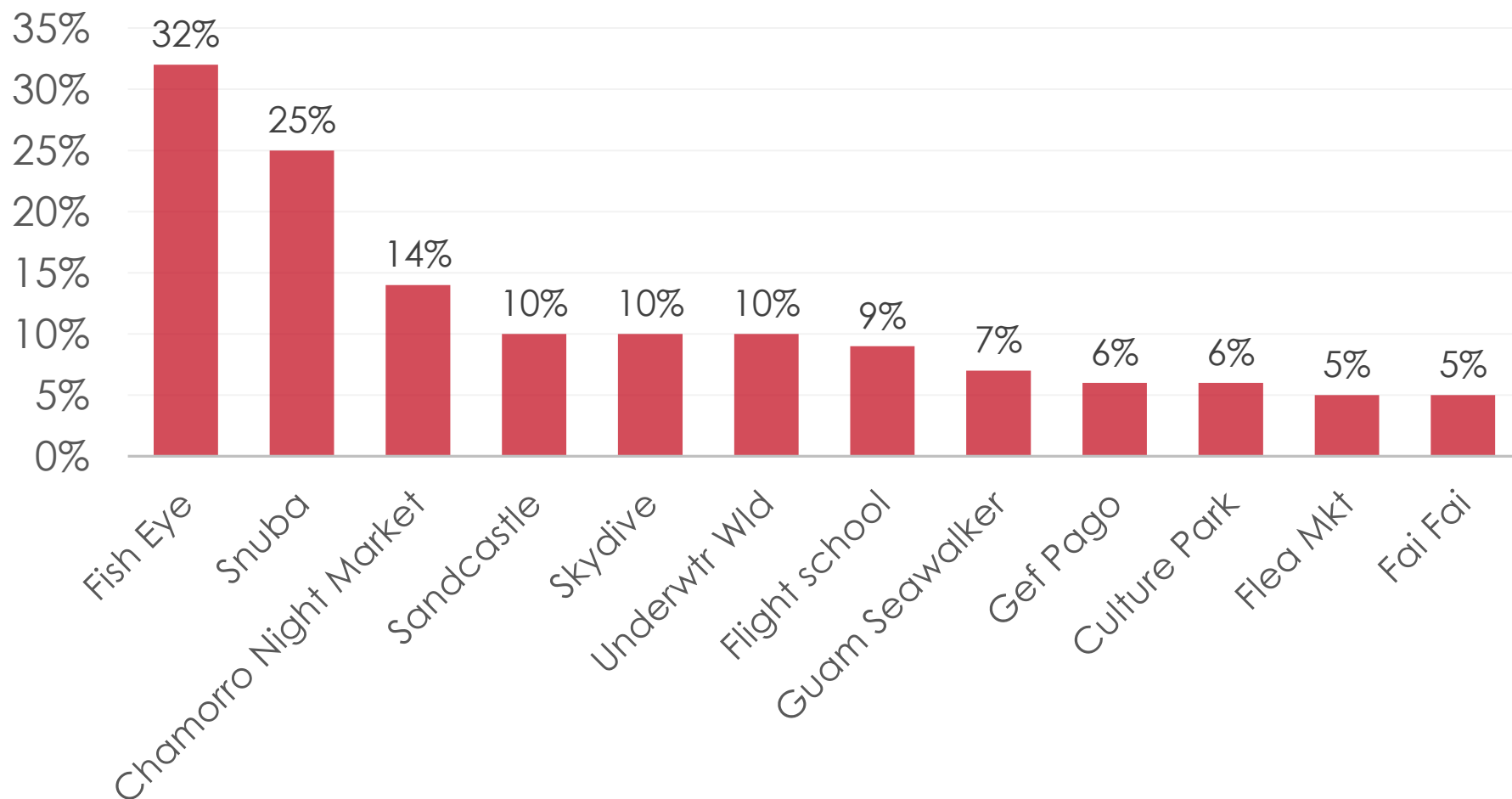
# SHOPPING - SATISFACTION



# OPTIONAL TOUR PARTICIPATION – Tracking

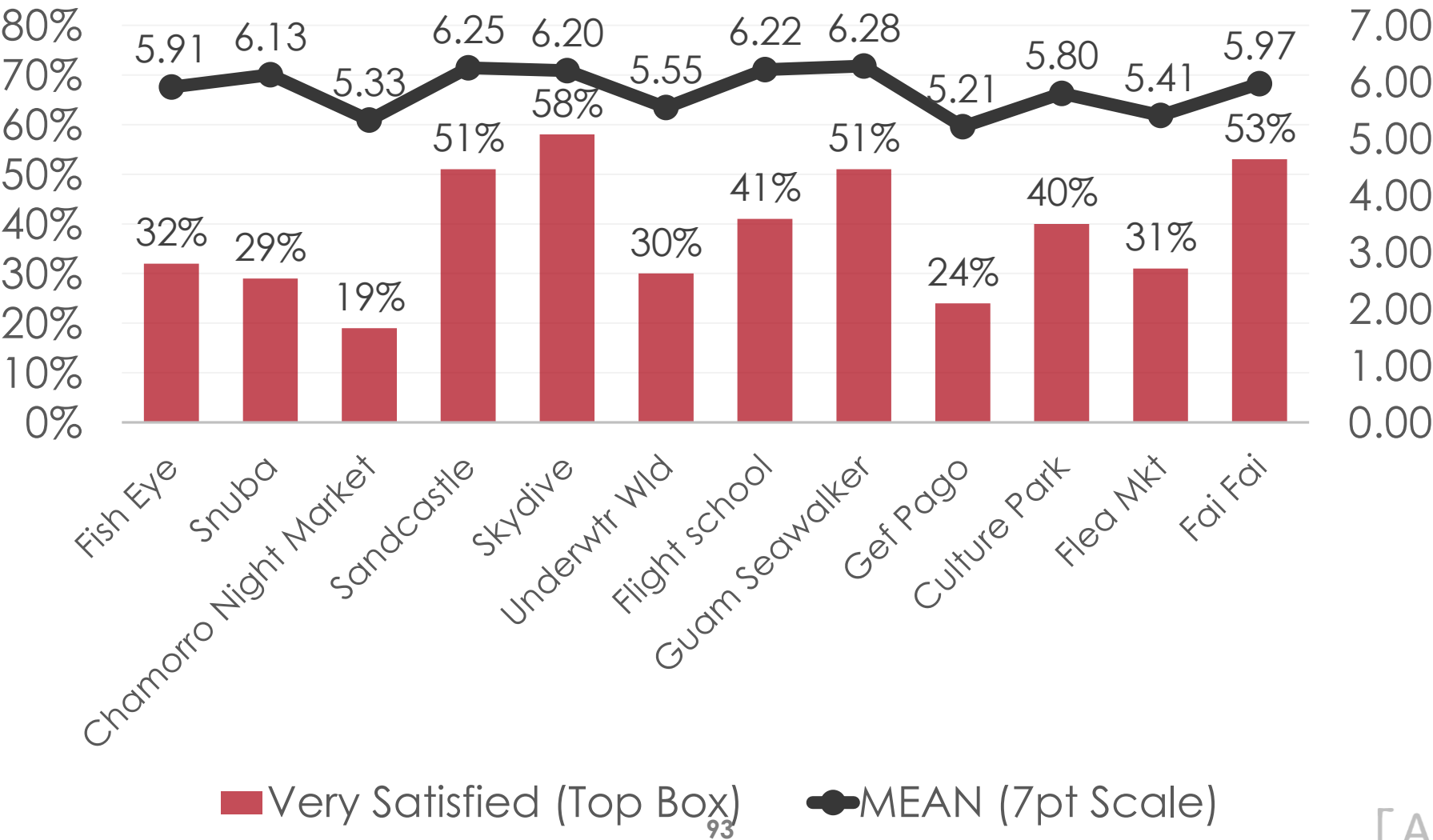


# Optional Tour Participation (Top Responses) FY2017

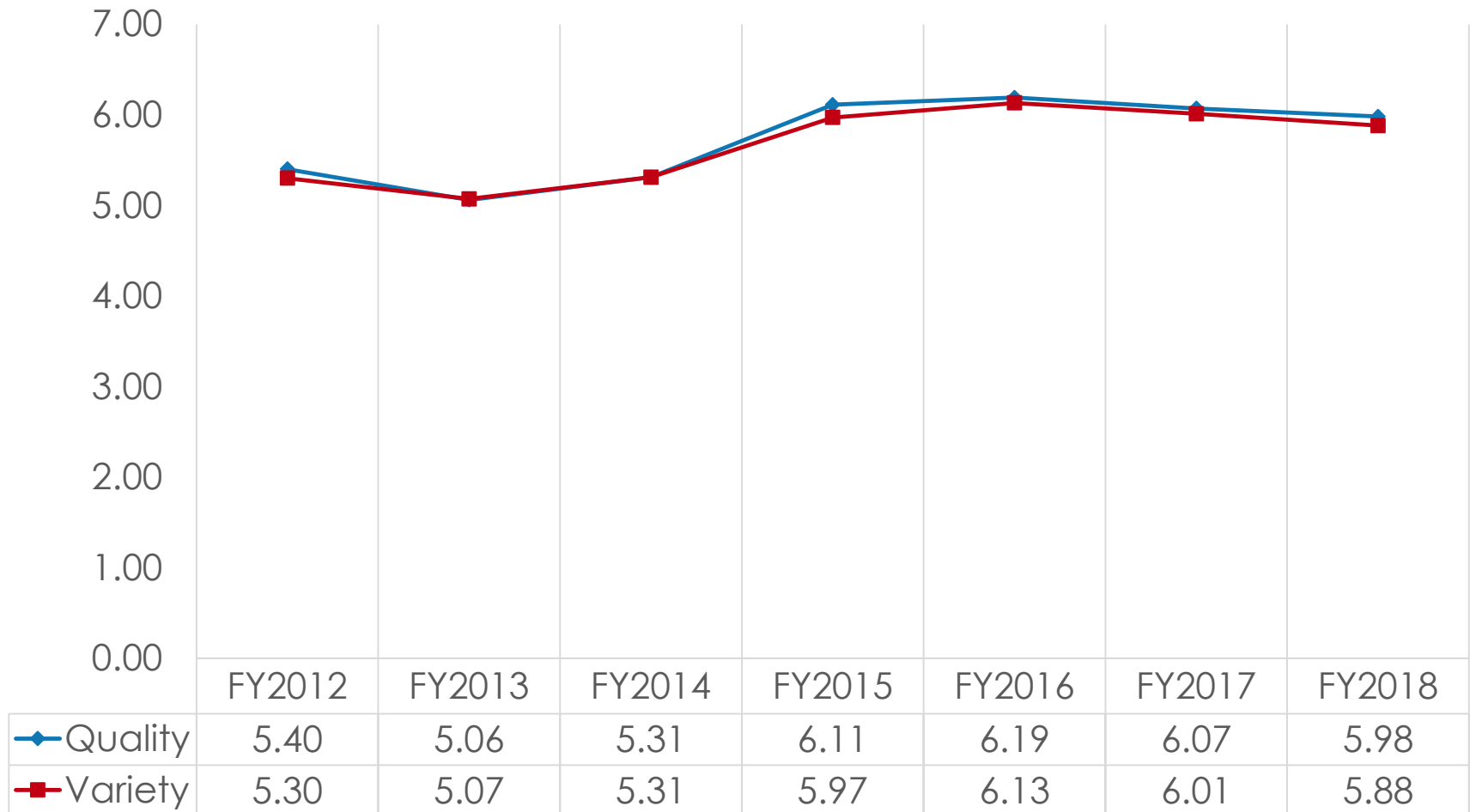


# Optional Tour Satisfaction

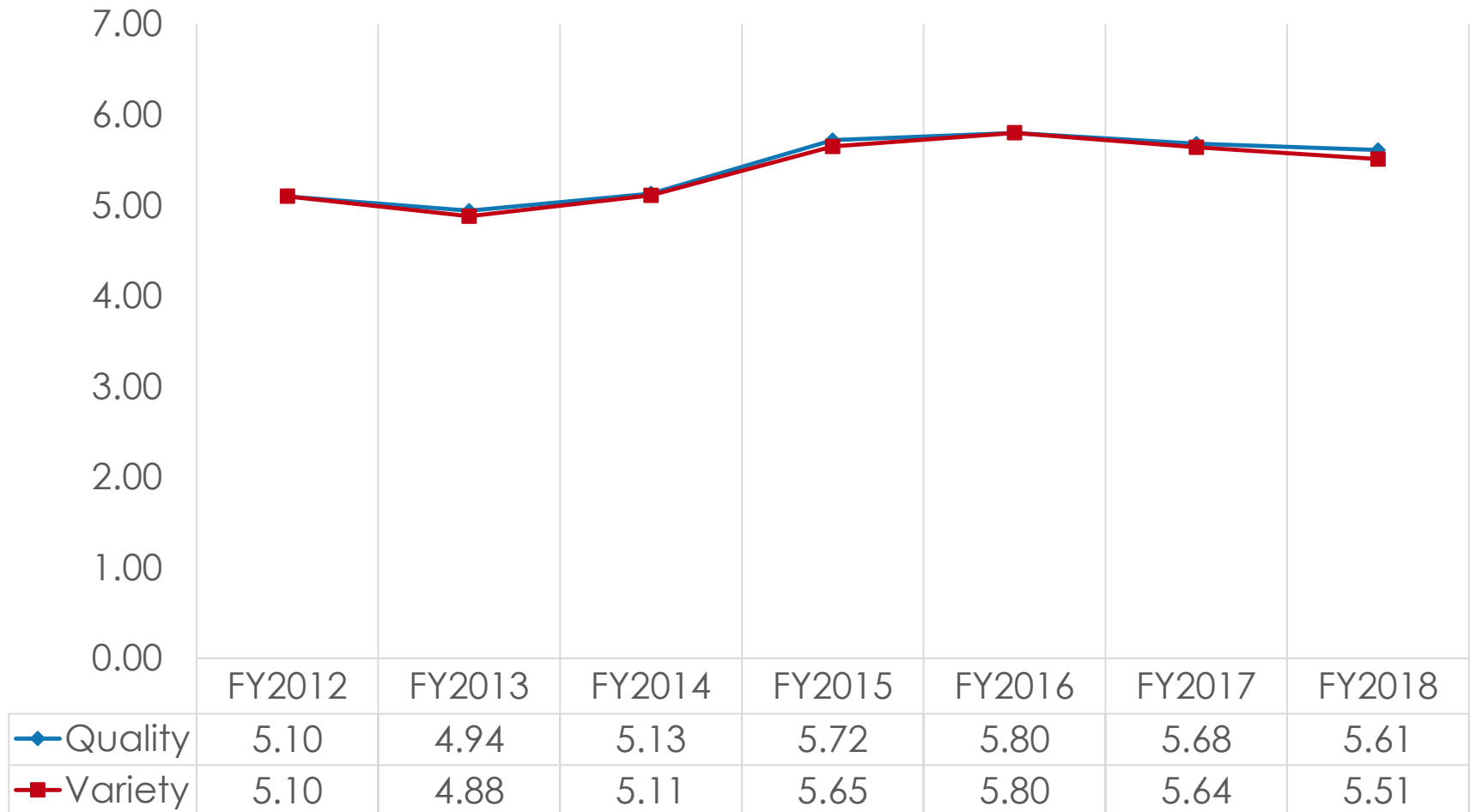
## Top Responses only - Participation (5%+)



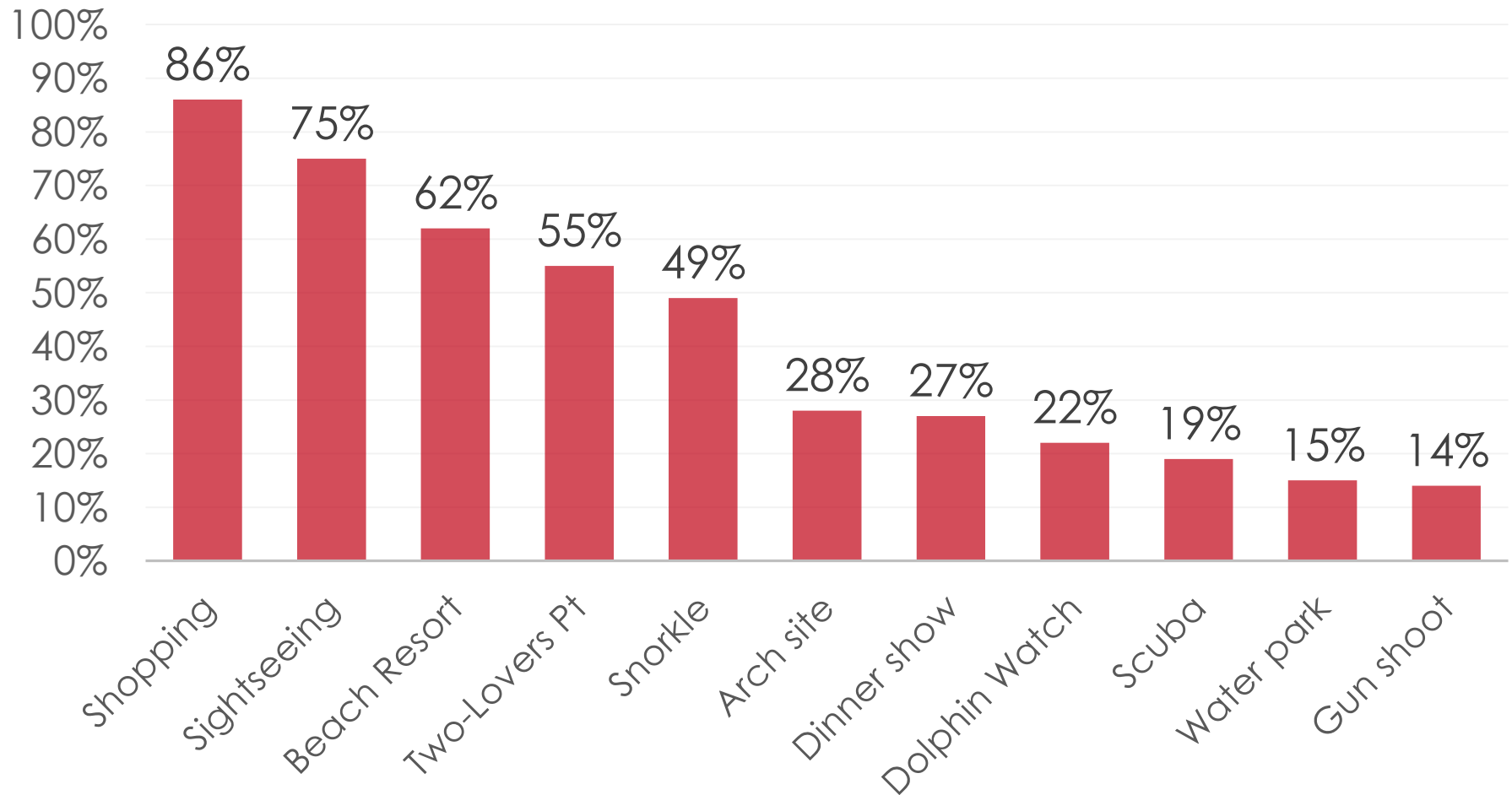
# DAY TOUR - SATISFACTION



# NIGHT TOUR - SATISFACTION



# Activities Participation (Top Responses)

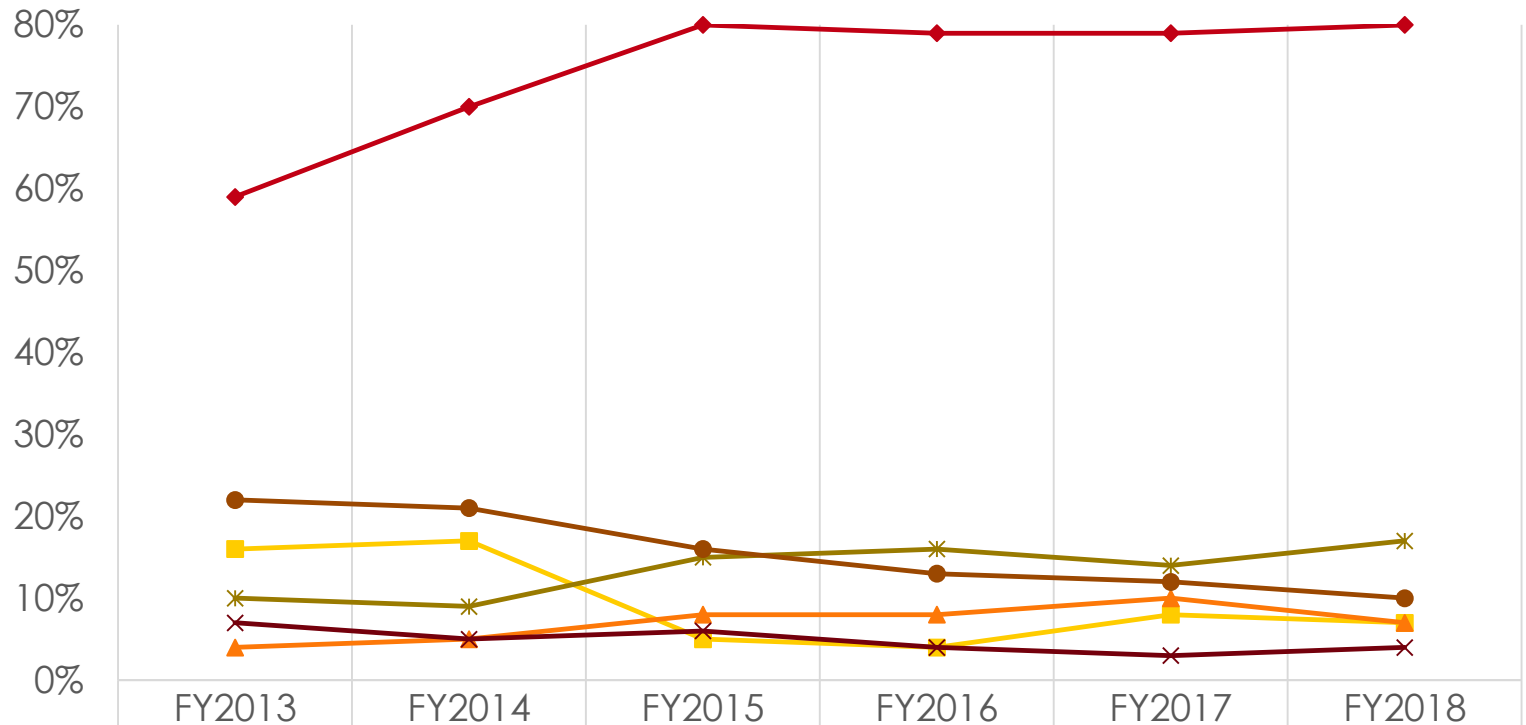




# SECTION 5

# PROMOTIONS

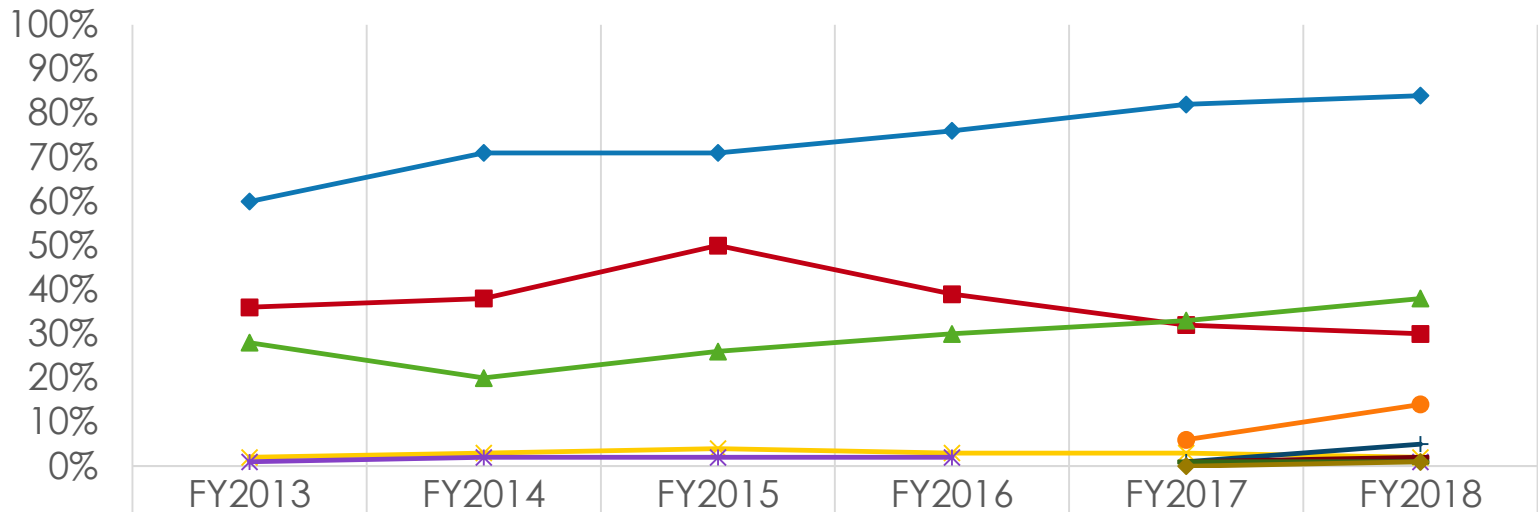
# INTERNET- GUAM SOURCES OF INFORMATION



◆ Search Engines	FY2013	59%	FY2014	70%	FY2015	80%	FY2016	79%	FY2017	79%	FY2018	80%
■ Blogs		16%		17%		5%		4%		8%		7%
▲ None		4%		5%		8%		8%		10%		7%
✕ Q&A sites		7%		5%		6%		4%		3%		4%
* Social network		10%		9%		15%		16%		14%		17%
● Forums		22%		21%		16%		13%		12%		10%

# INTERNET- SOURCES OF INFORMATION

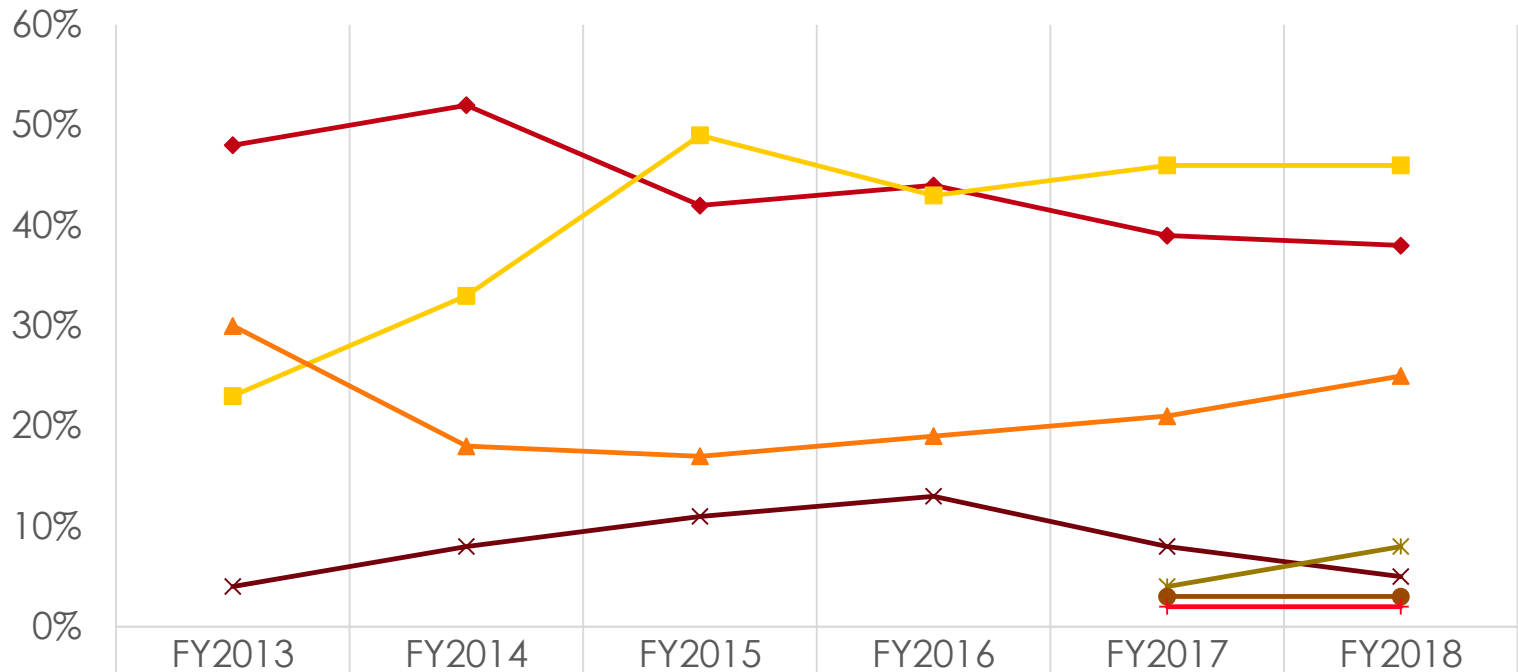
## Things to do on Guam



Google	60%	71%	71%	76%	82%	84%
Yahoo	36%	38%	50%	39%	32%	30%
Facebook	28%	20%	26%	30%	33%	38%
None	2%	3%	4%	3%	3%	2%
Other	1%	2%	2%	2%		1%
Instagram					6%	14%
Online Booking					1%	5%
Baidu					1%	2%
Weibo					1%	1%
Twitter					0%	1%

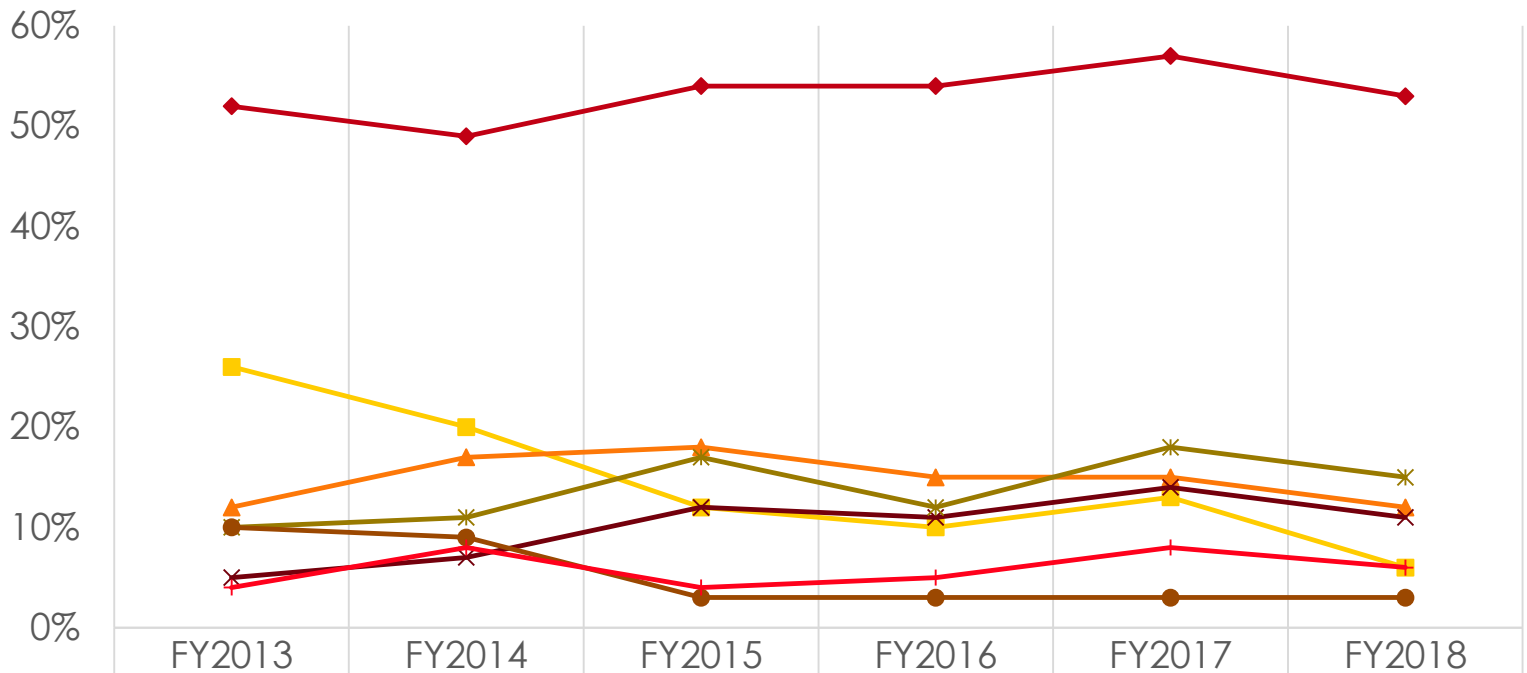
# INTERNET- SOURCES OF INFORMATION

## GVB



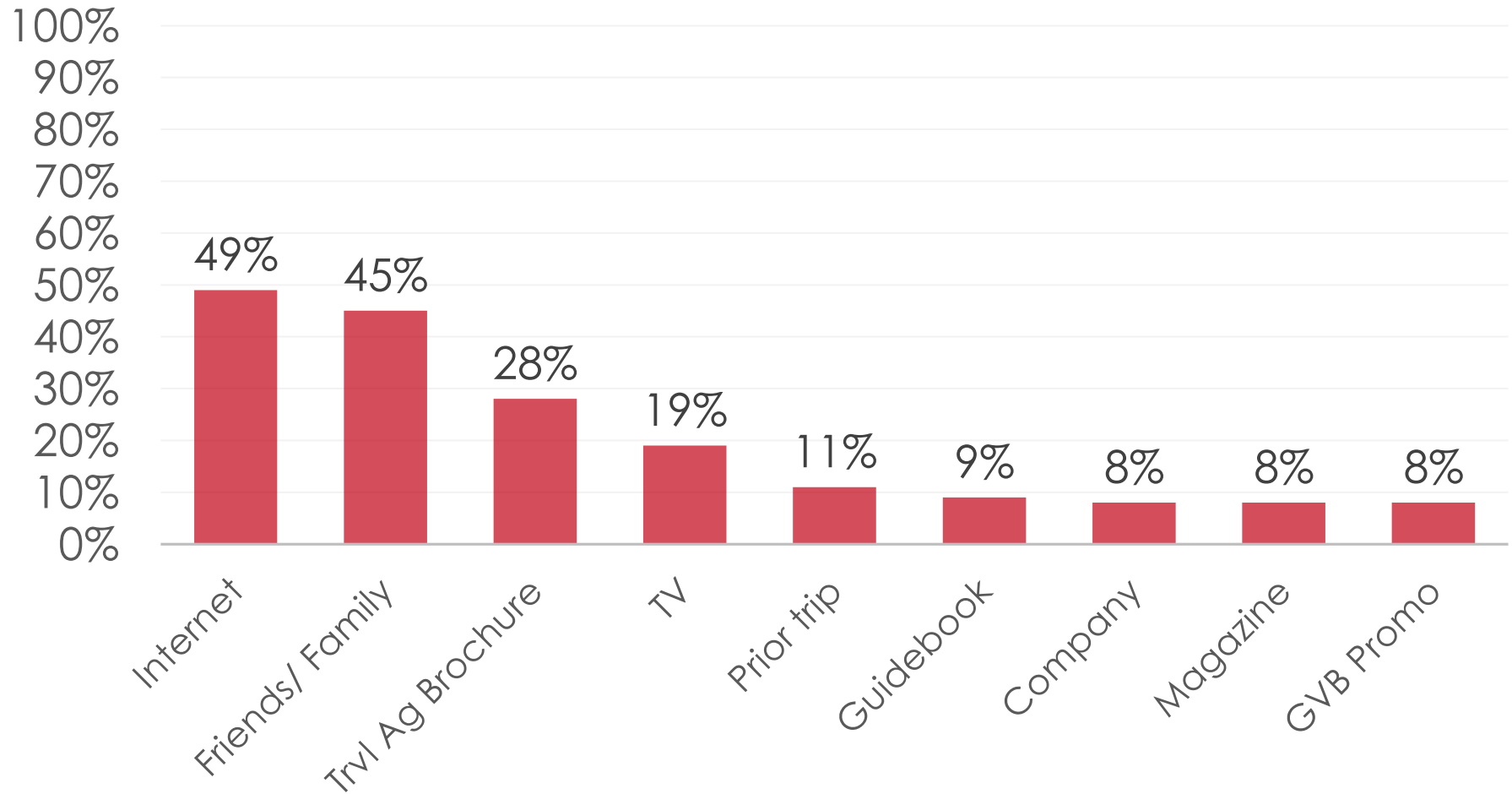
	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
◆ None	48%	52%	42%	44%	39%	38%
■ GVB Website	23%	33%	49%	43%	46%	46%
▲ GVB Facebook	30%	18%	17%	19%	21%	25%
✕ GVB Blog	4%	8%	11%	13%	8%	5%
✱ GVB IG					4%	8%
● GVB Twitter					3%	3%
+ GVB Café					2%	2%

# TRAVEL MOTIVATION



◆ Friends/ Family	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
■ Internet	52%	49%	54%	54%	57%	53%
▲ Travel Agent	26%	20%	12%	10%	13%	6%
✕ Social media	12%	17%	18%	15%	15%	12%
✱ Travel shows	5%	7%	12%	11%	14%	11%
● Magazine	10%	11%	17%	12%	18%	15%
+ Company/ Bus	10%	9%	3%	3%	3%	3%
	4%	8%	4%	5%	8%	6%

# PRE-ARRIVAL SOURCES OF INFORMATION



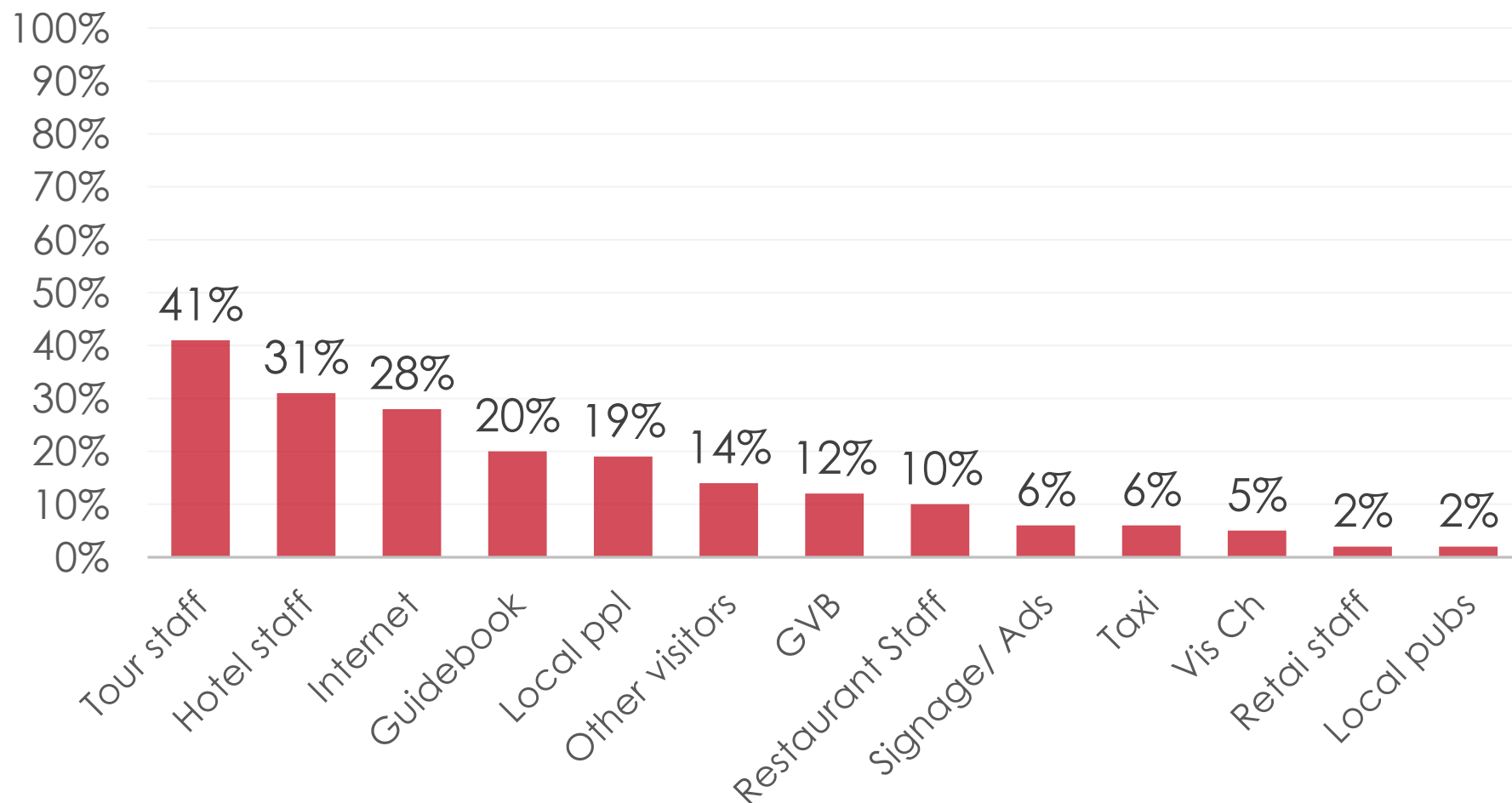
# PRE-ARRIVAL SOURCES OF INFORMATION

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

FY2018
49% Internet 45% Recommend 28% Brochure

# ONISLE

## SOURCES OF INFORMATION





# ON-ISLE SOURCES OF INFORMATION

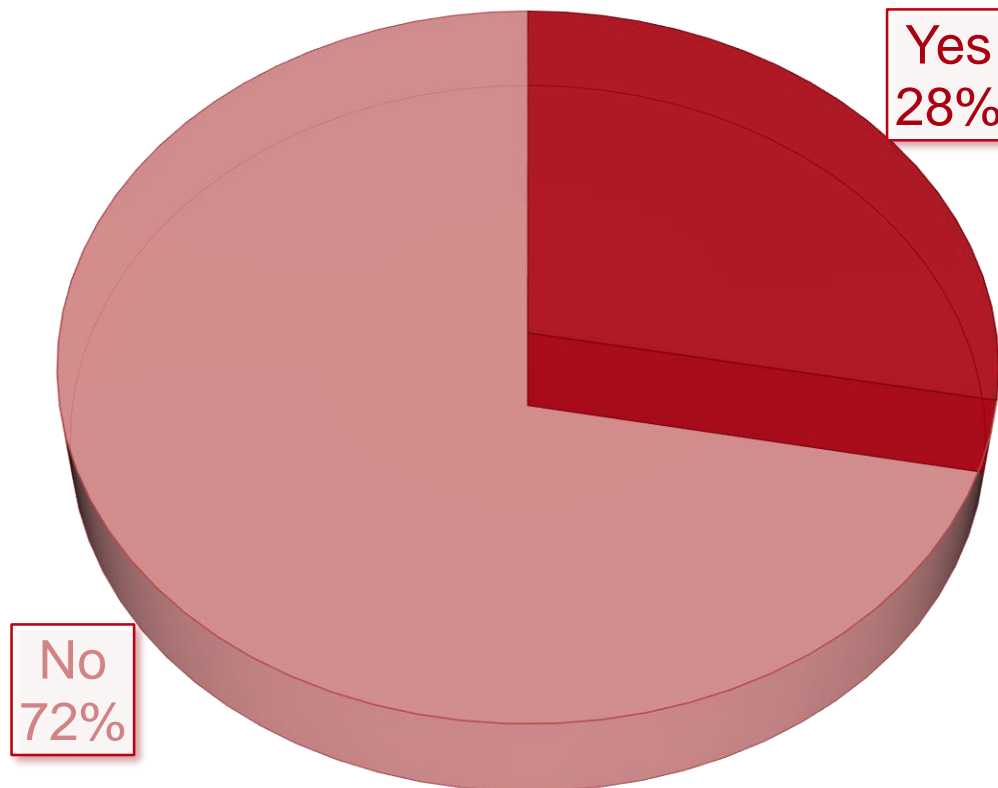
FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
18% Tour staff 12% Hotel staff	25% Hotel staff 20% Tour staff 11% Internet	32% Tour staff 21% Internet 13% Hotel staff	51% Tour staff 18% Internet 6% Hotel staff	36% Tour staff 26% Internet 11% Hotel staff	53% Tour staff 34% Hotel staff 33% Internet/app

FY2018
41% Tour staff 31% Hotel staff 28% Internet/app

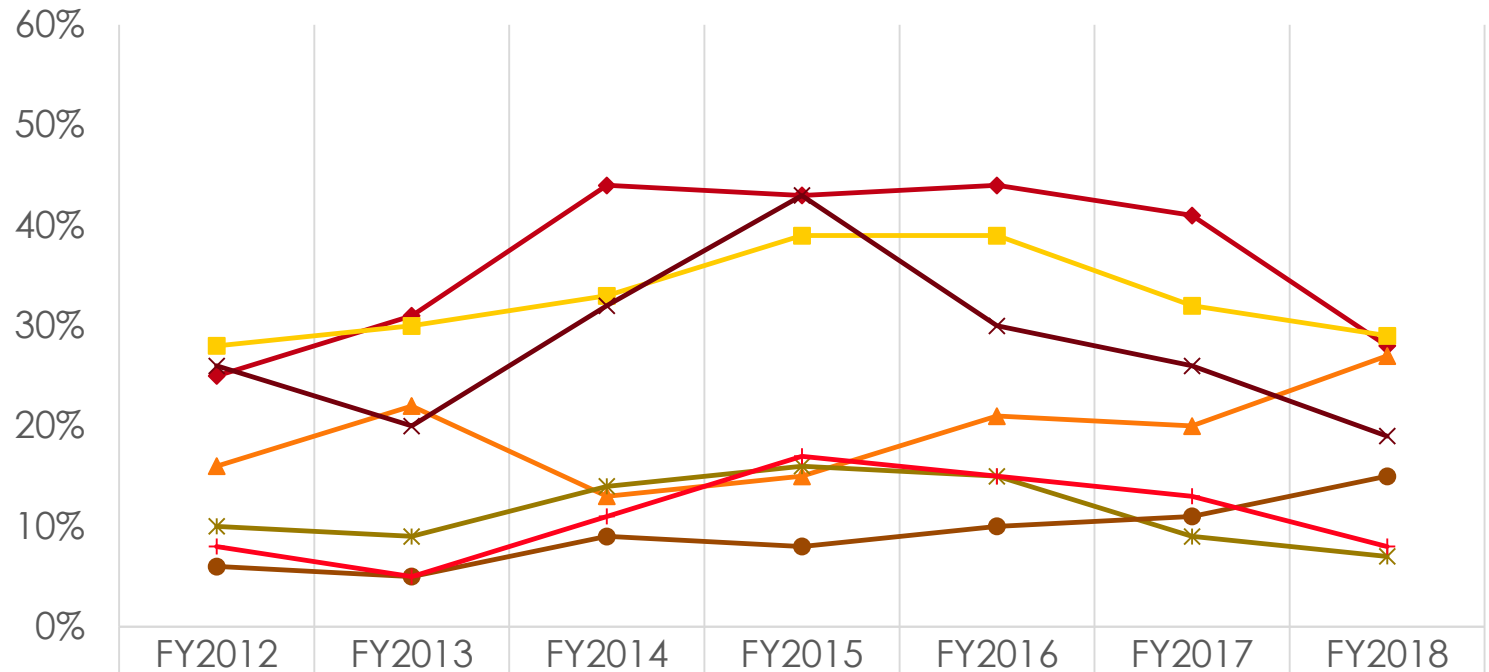
# SECTION 6

## FUTURE TRAVEL TO GUAM

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

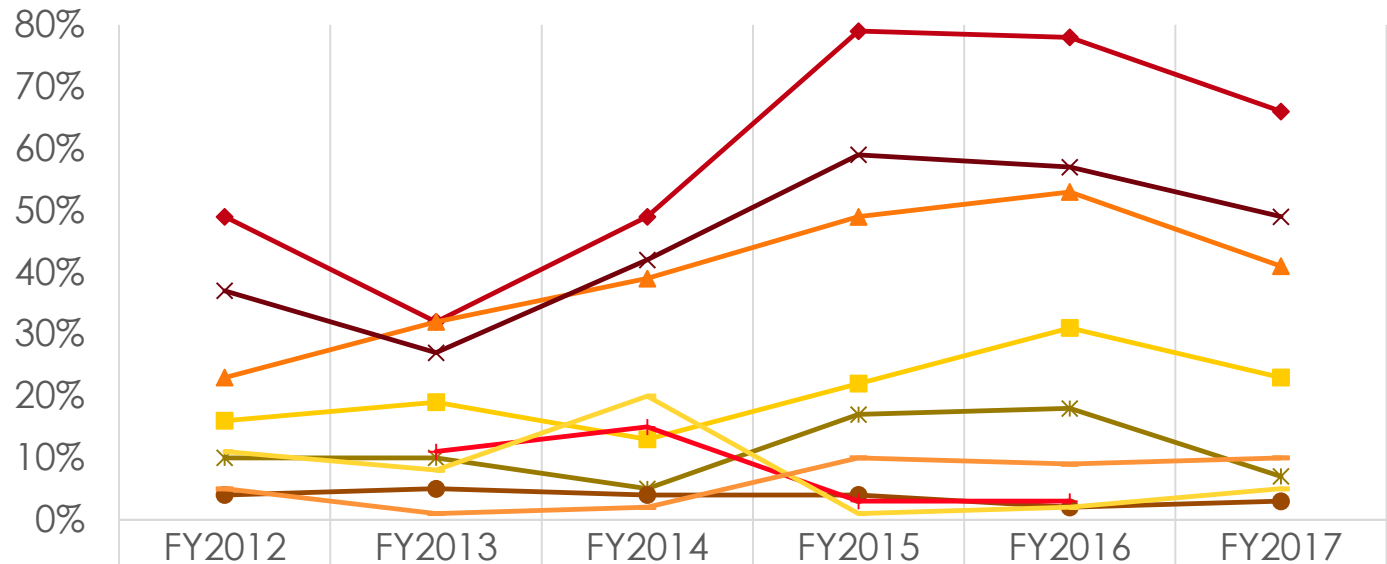


# What would it take to make you stay an extra day on Guam?



◆ More time	25%	31%	44%	43%	44%	41%	28%
■ Budget/ money	28%	30%	33%	39%	39%	32%	29%
▲ Nothing	16%	22%	13%	15%	21%	20%	27%
✕ Flt Schedules	26%	20%	32%	43%	30%	26%	19%
* Less restrictions	10%	9%	14%	16%	15%	9%	7%
● Things to do	6%	5%	9%	8%	10%	11%	15%
+ Pkg - longer stays	8%	5%	11%	17%	15%	13%	8%

# FUTURE TRAVEL CONCERNS

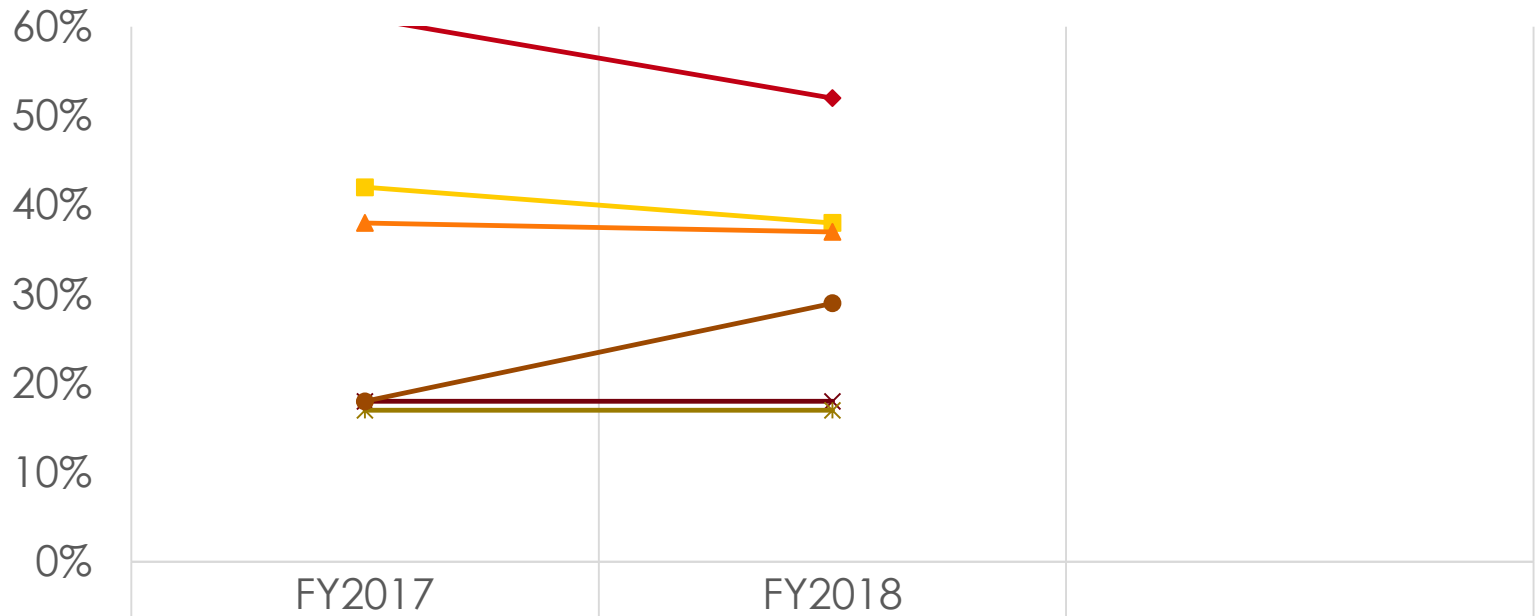


◆ Safety	49%	32%	49%	79%	78%	66%
■ Terrorism	16%	19%	13%	22%	31%	23%
▲ Food	23%	32%	39%	49%	53%	41%
✕ Expense	37%	27%	42%	59%	57%	49%
* Discrimination	10%	10%	5%	17%	18%	7%
● Should spend at home	4%	5%	4%	4%	2%	3%
+ Other		11%	15%	3%	3%	
— Don't know	11%	8%	20%	1%	2%	5%
— No concerns	5%	1%	2%	10%	9%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

# SECTION 7

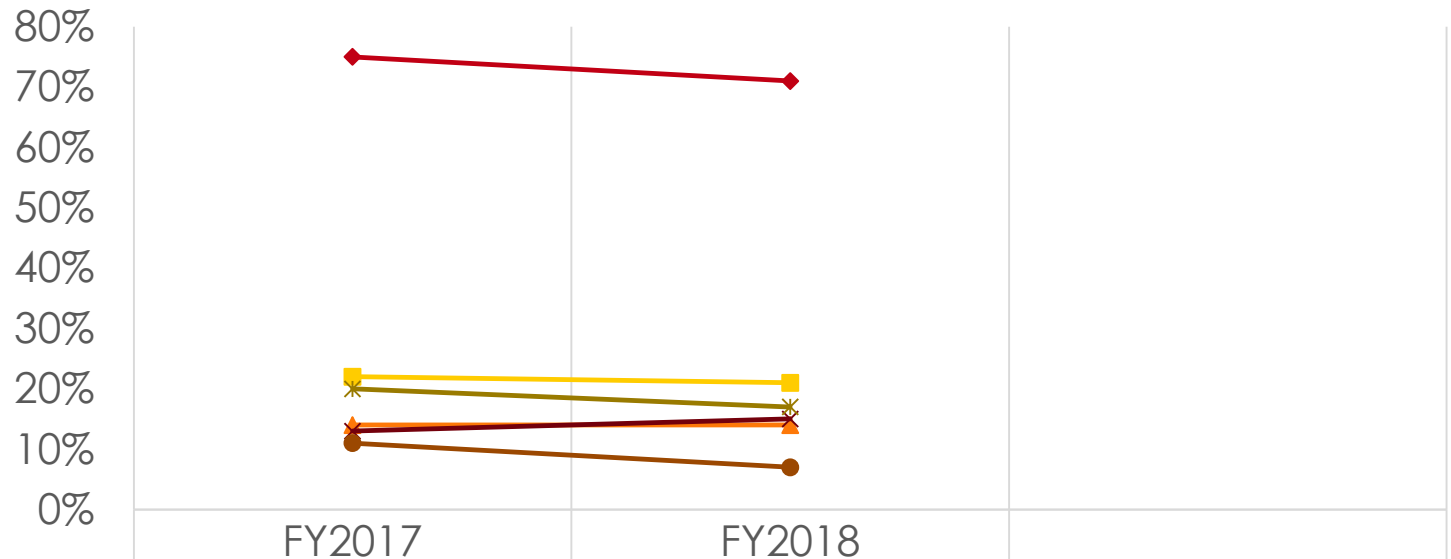
## GUAM CULTURE

# EXPERIENCED- CHAMORRO/ HAFA ADAI SPIRIT



◆ Beaches	61%	52%
■ Local music	42%	38%
▲ Local people	38%	37%
✕ Night market	18%	18%
✱ None	17%	17%
● Local food	18%	29%

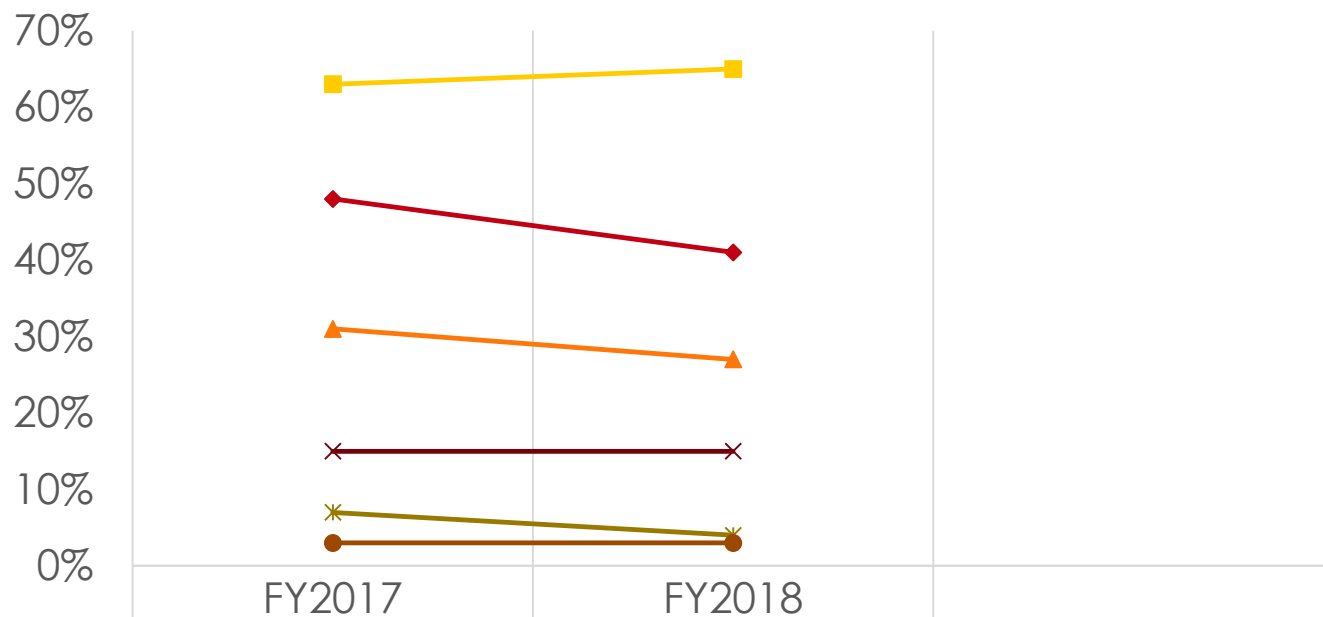
# EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



◆ 2-Lovers Pt	75%	71%	
■ Chamorro Cult Entertainment	22%	21%	
▲ Chamorro Village	14%	14%	
× None	13%	15%	
* Guam Museum	20%	17%	
● Village Latte	11%	7%	

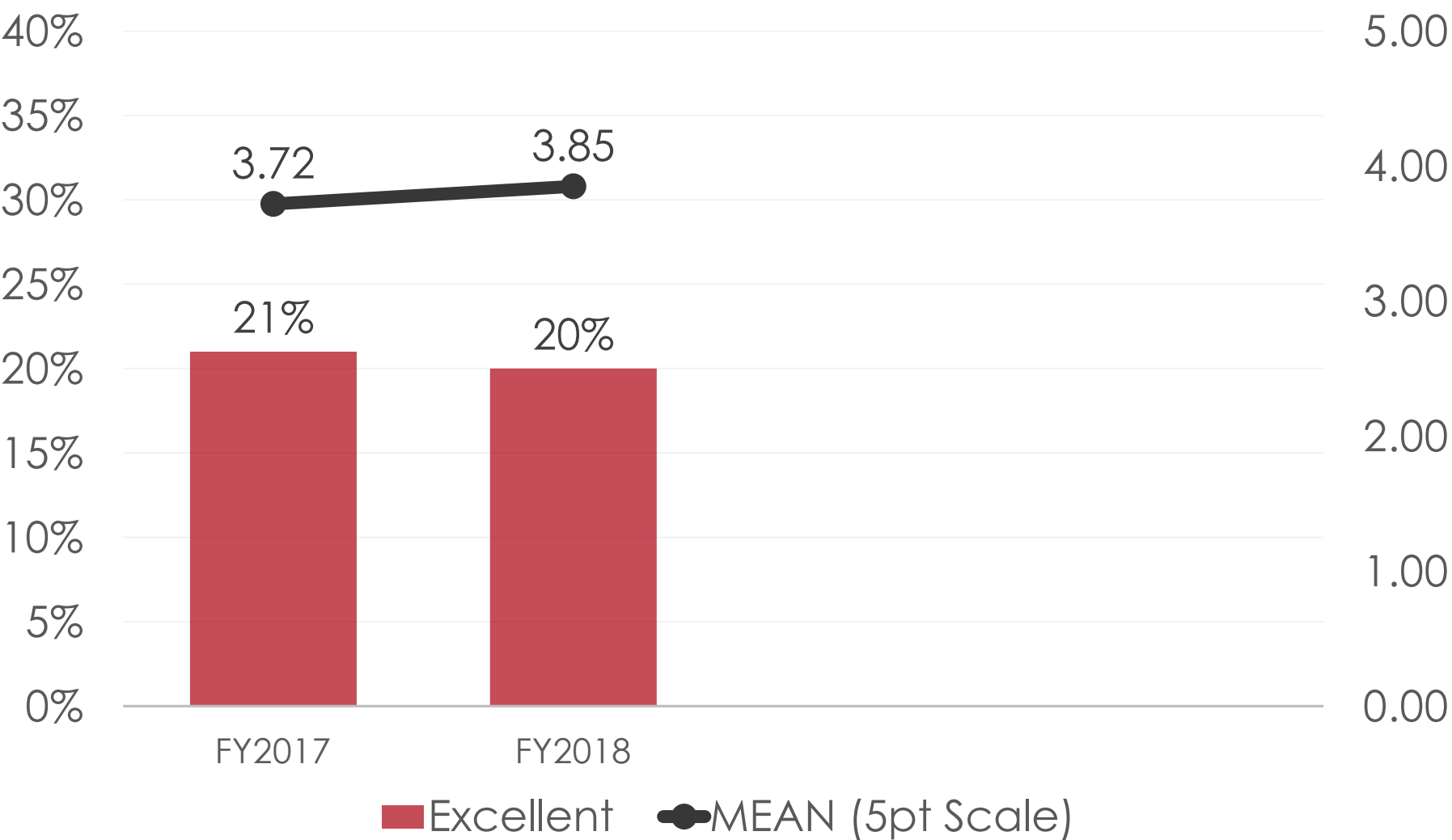


# SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS

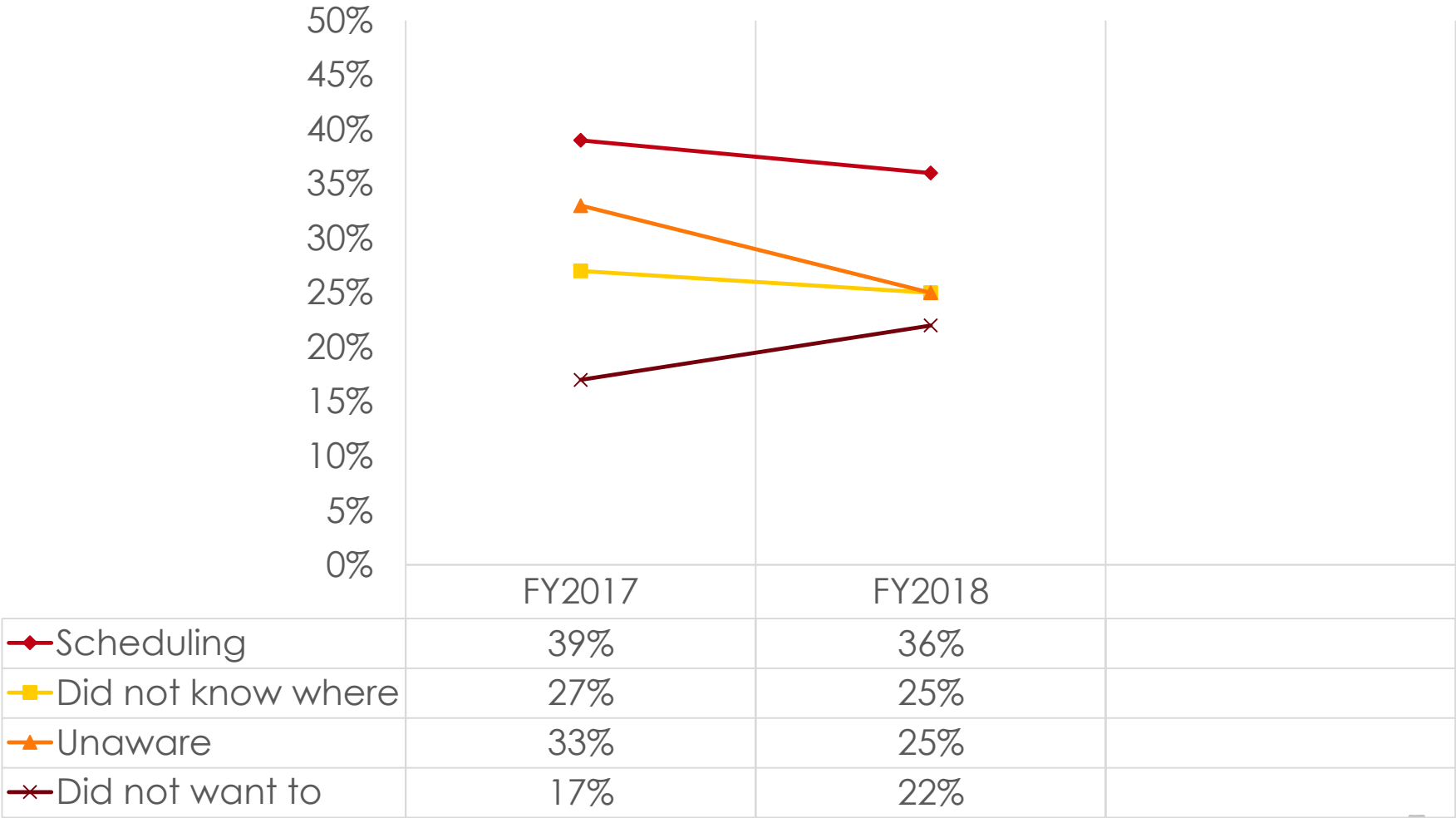


◆ Internet	48%	41%	
■ Travel agency	63%	65%	
▲ Guides/ Brochures	31%	27%	
✕ Family/ friends	15%	15%	
* Hotel staff	7%	4%	
● Newspaper/ Magazine	3%	3%	

# 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 ( $p \leq .05$ ) 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, Annual 2018	
Drivers:	Annual 2018 rank
Quality & Cleanliness of beaches & parks	
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	1
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	
Variety of shopping	4
Price of things on Guam	
Quality of hotel accommodations	2
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	3
Quality of ground handler	
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	40.7%
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 2018 Period. By rank order they are:
  - **Quality of day time tours,**
  - **Quality of hotel accommodations,**
  - **Quality of landscape in Guam, and**
  - **Variety of shopping.**
- With all four factors the overall  $r^2$  is .407 meaning that **40.7% of overall satisfaction is accounted for by these factors.**

# Drivers – On-Isle Expenditures

Comparison of Drivers of Per Person On-Island Expenditures, Annual 2018	
	Annual 2018
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	
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	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 2018 period.