

# Guam Visitors Bureau

## Taiwan Visitor Tracker Exit Profile & Market Segmentation Report

FY2018

QTR.2 (JAN – MAR 2018)

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 **159** 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 **159** is +/- 7.8 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 +/- 7.8 percentage points.

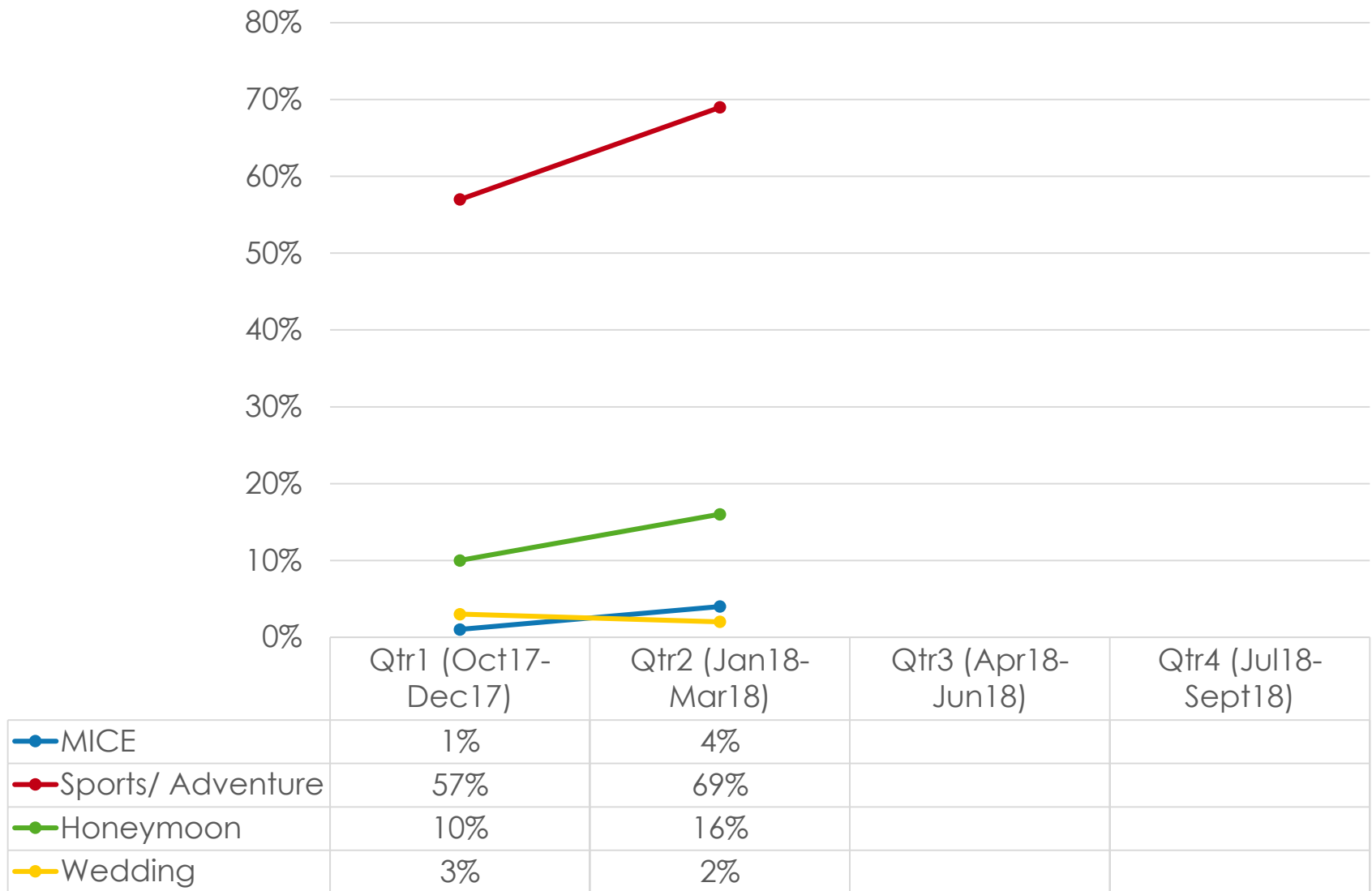
# Objectives

- 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

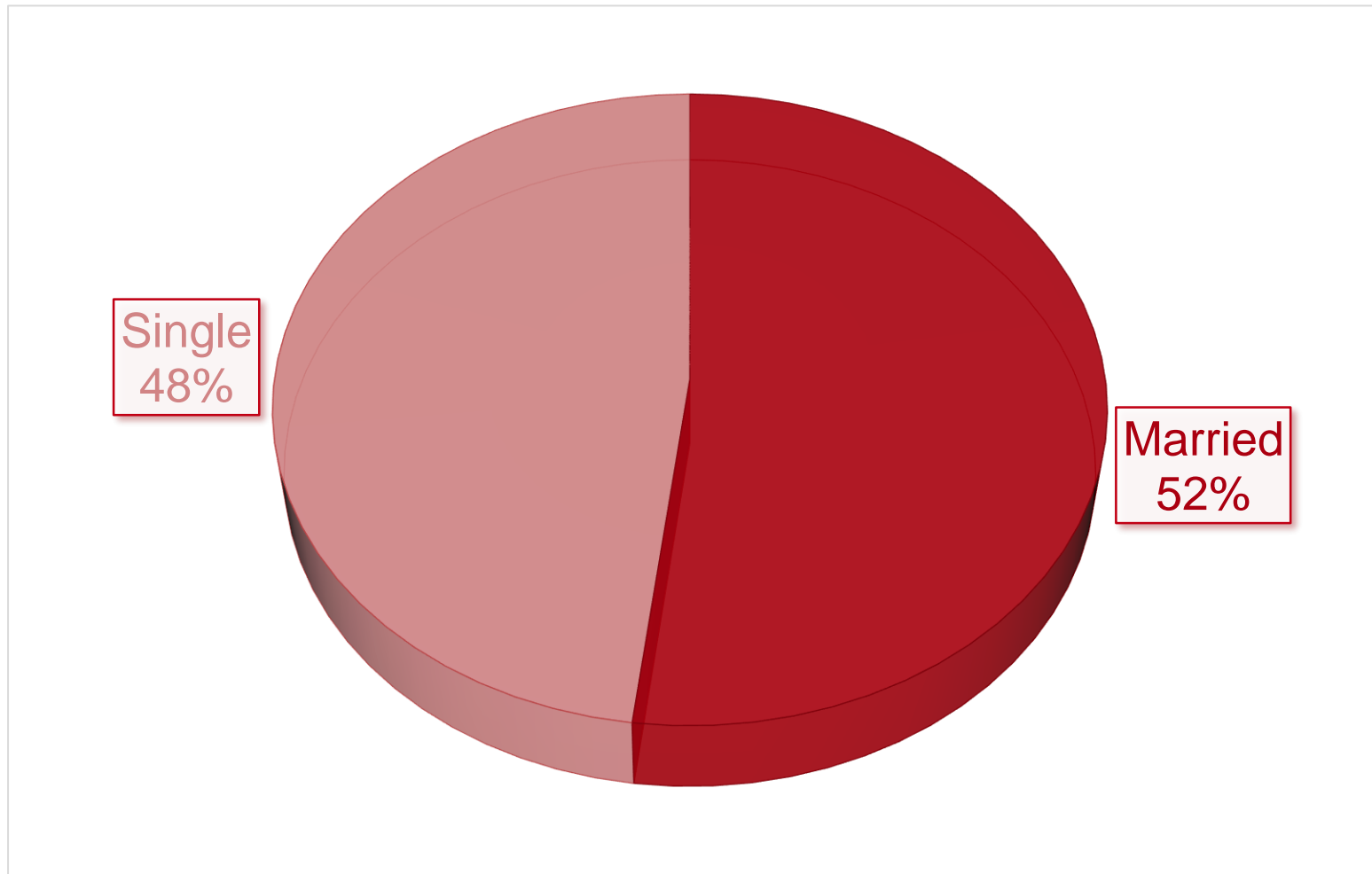
# Key Highlighted Segments



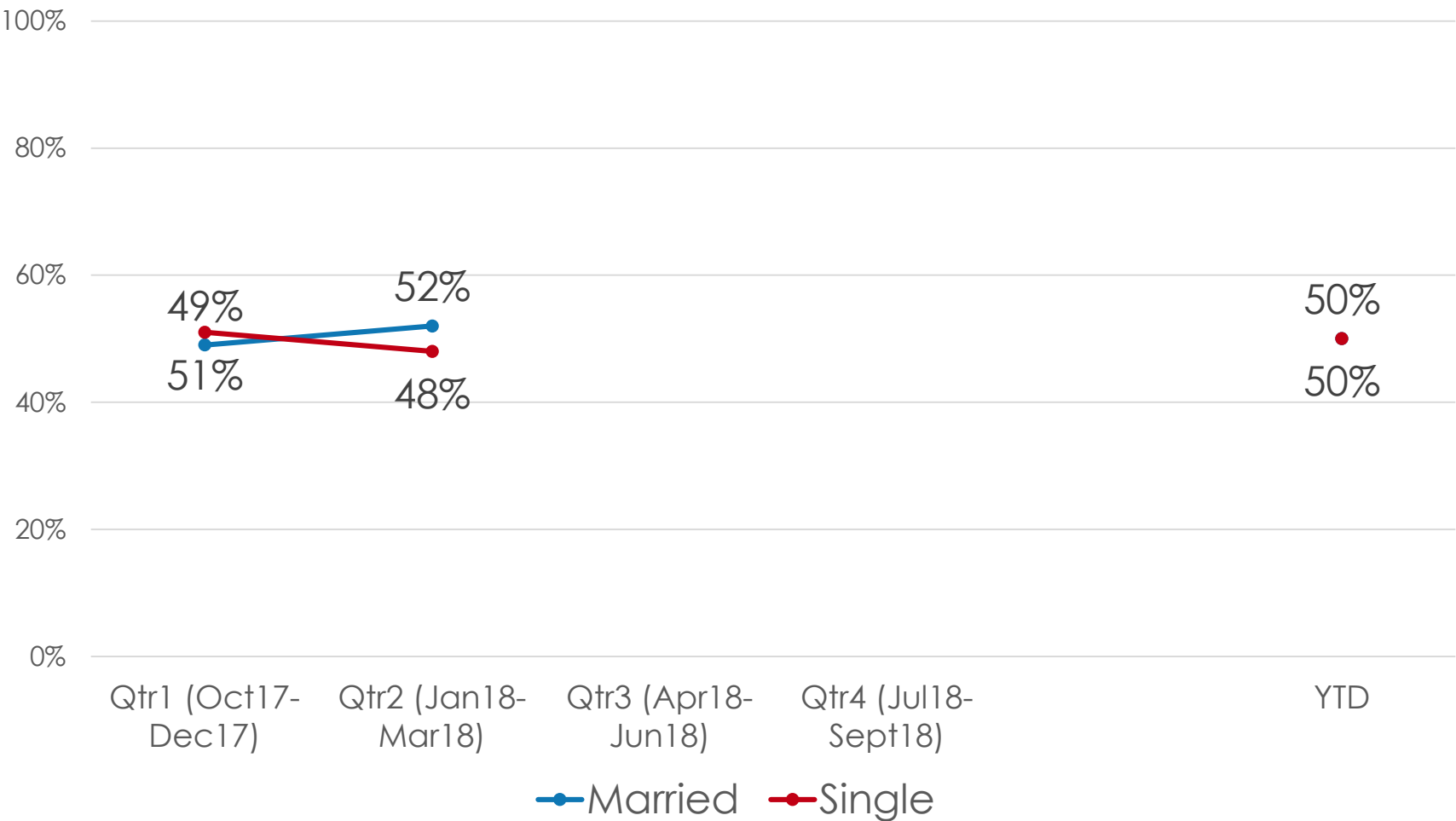
# SECTION 1

## PROFILE OF RESPONDENTS

# Marital Status



# Marital status – FY2018 Tracking





# Marital status – Key Segments

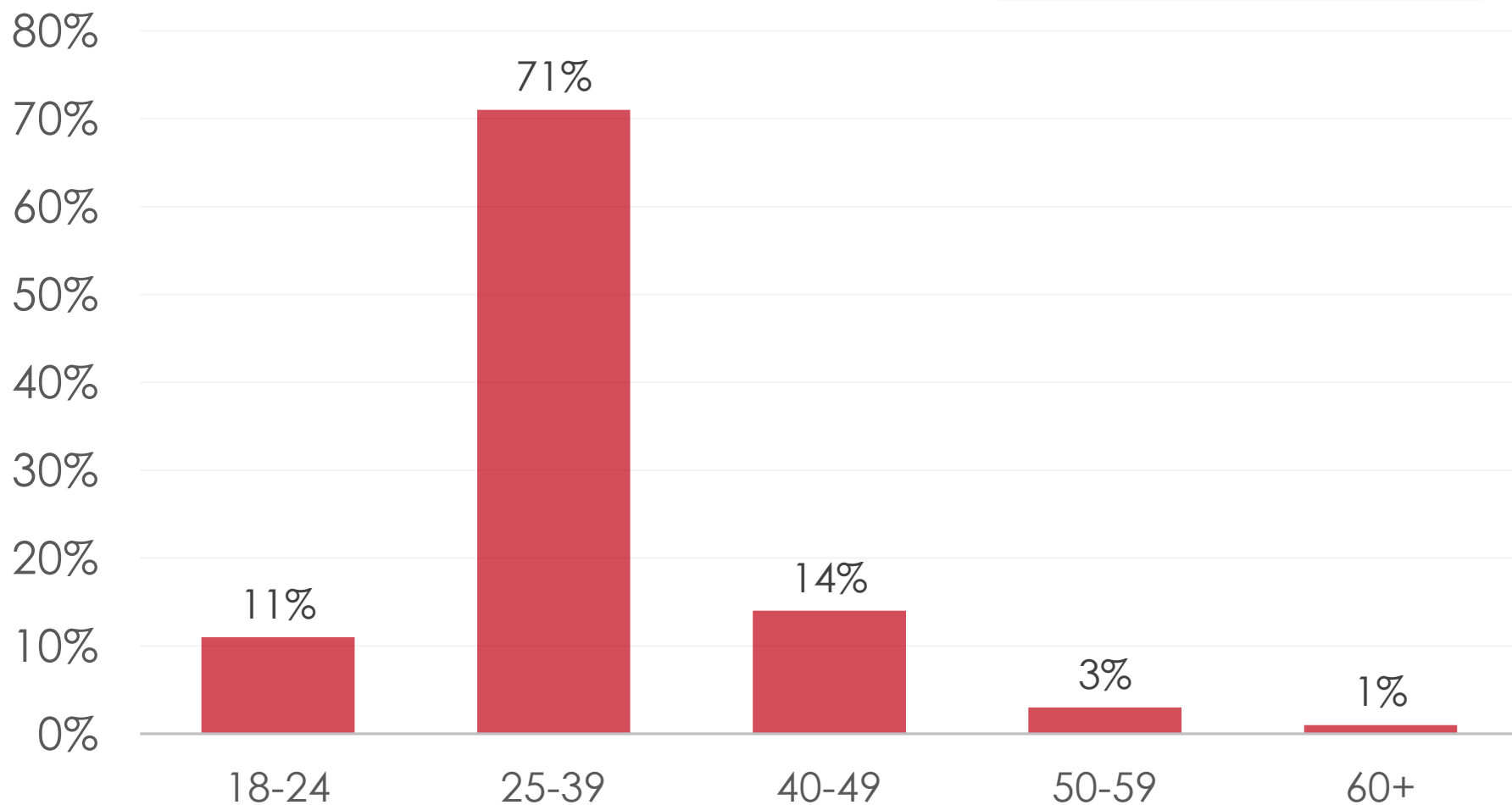
**GVB EXIT SURVEY  
QE MARITAL STATUS**

		TOTAL	MICE	SPORT/ ADV	WEDDING	HONEYMOON
		-	-	-	-	-
QE	Married	52%	14%	49%	33%	92%
	Single	48%	86%	51%	67%	8%
	Total	159	7	109	3	25

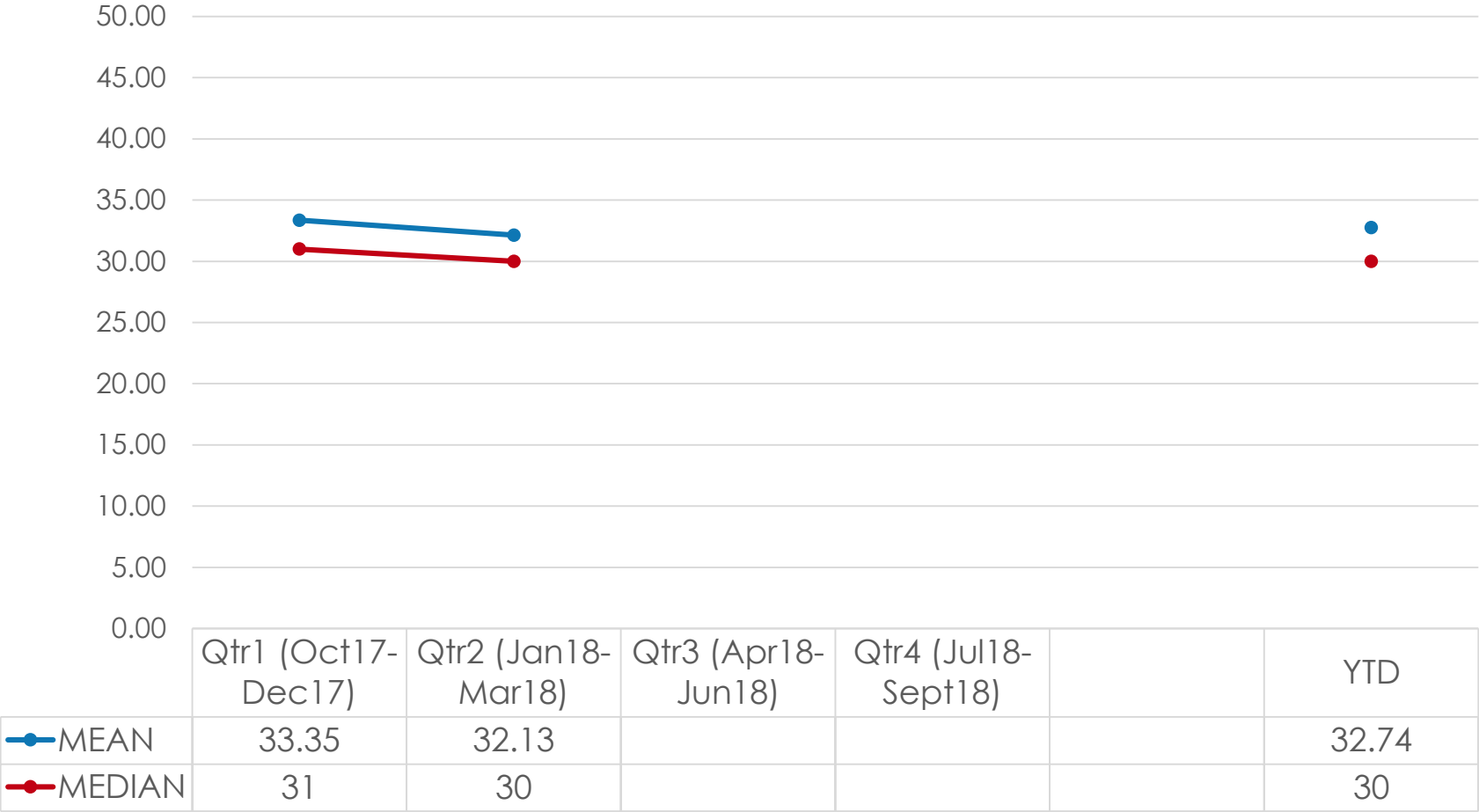
Prepared by Anthology Research

# Age

MEAN = 32.13  
MEDIAN = 30



# Age – FY2018 Tracking



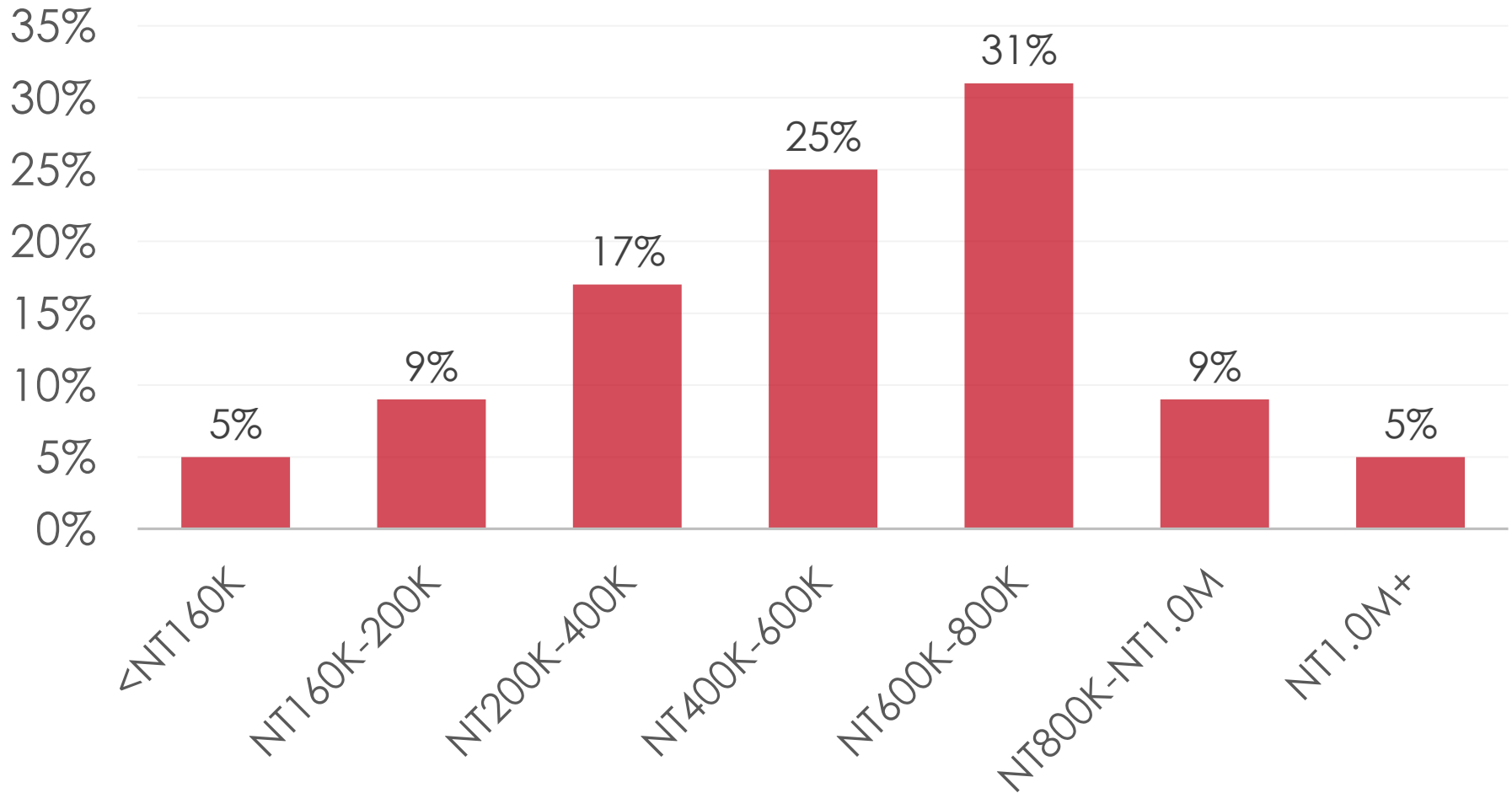
# Age – Key Segments

**GVB EXIT SURVEY  
AGE**

		TOTAL	MICE	SPORT/ ADV	WEDDING	HONEYMOON
		-	-	-	-	-
SD	18-24	11%		13%		4%
	25-39	71%	86%	72%	67%	92%
	40-49	14%	14%	12%	33%	4%
	50-59	3%		3%		
	60+	1%				
	Total	159	7	109	3	25
SD	Mean	32.13	33.14	31.32	35.33	29.28
	Median	30	30	30	38	28

Prepared by Anthology Research

# Annual Household Income



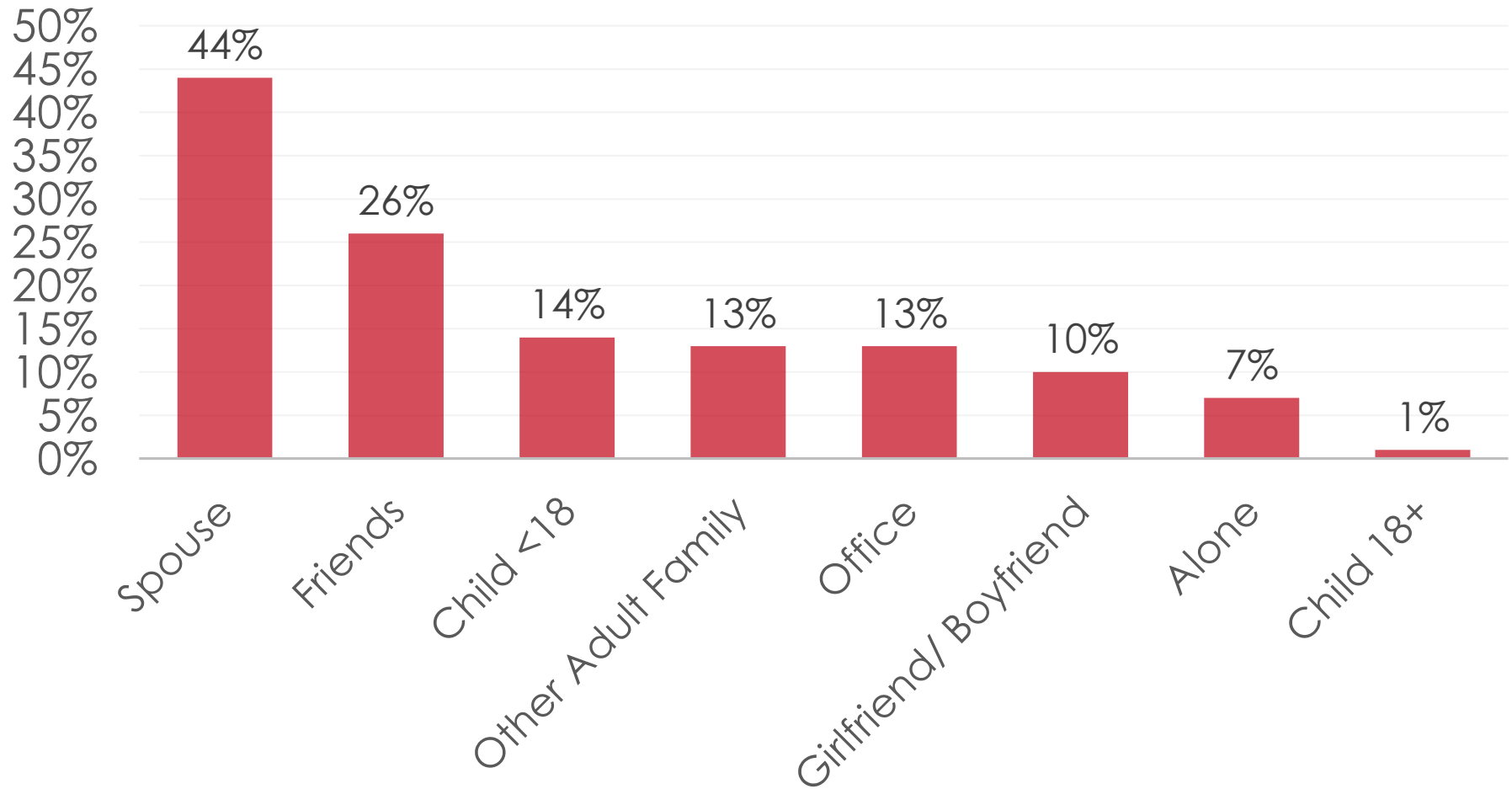
# Annual Household Income – Key Segments

**GVB EXIT SURVEY**  
**Q26 Household income:**

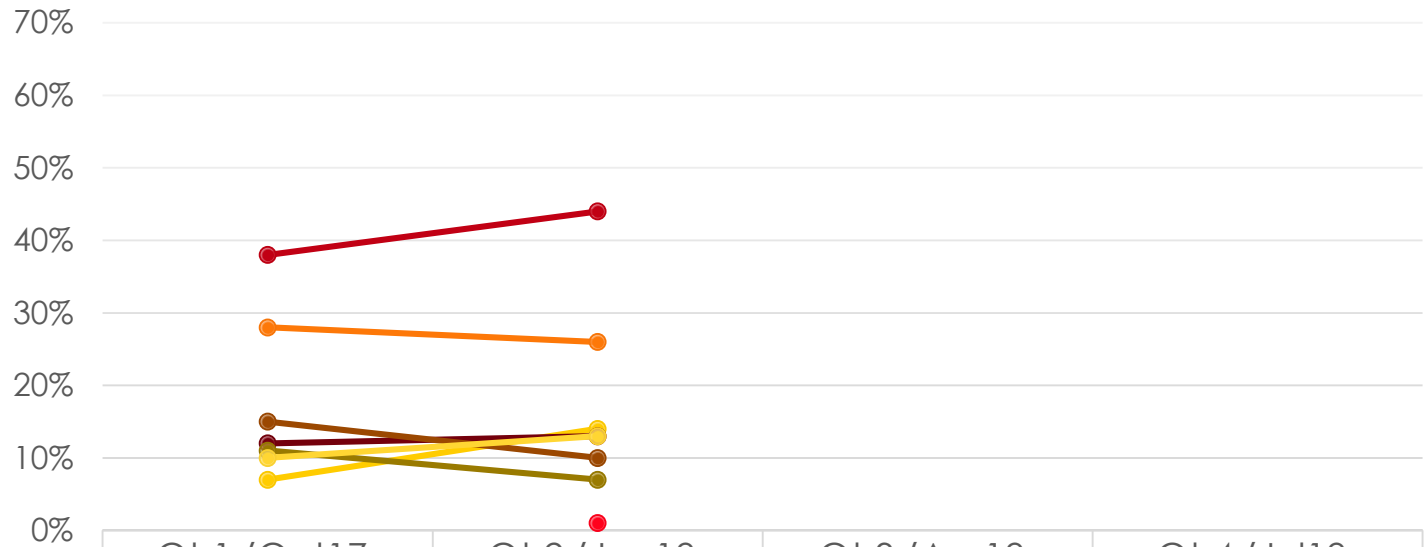
		TOTAL	MICE	SPORT/ ADV	WEDDING	HONEYMOON
		-	-	-	-	-
Q26	Less than NT160K	5%		4%		4%
	NT160K-NT200K	9%		10%		4%
	NT200K-NT400K	17%	14%	16%		25%
	NT400K-NT600K	25%	14%	23%		38%
	NT600K-NT800K	31%	57%	34%	100%	21%
	NT800K-NT1.0M	9%	14%	9%		8%
	NT1.0M+	5%		5%		
	Total	151	7	104	2	24

Prepared by Anthology Research

# Travel Party



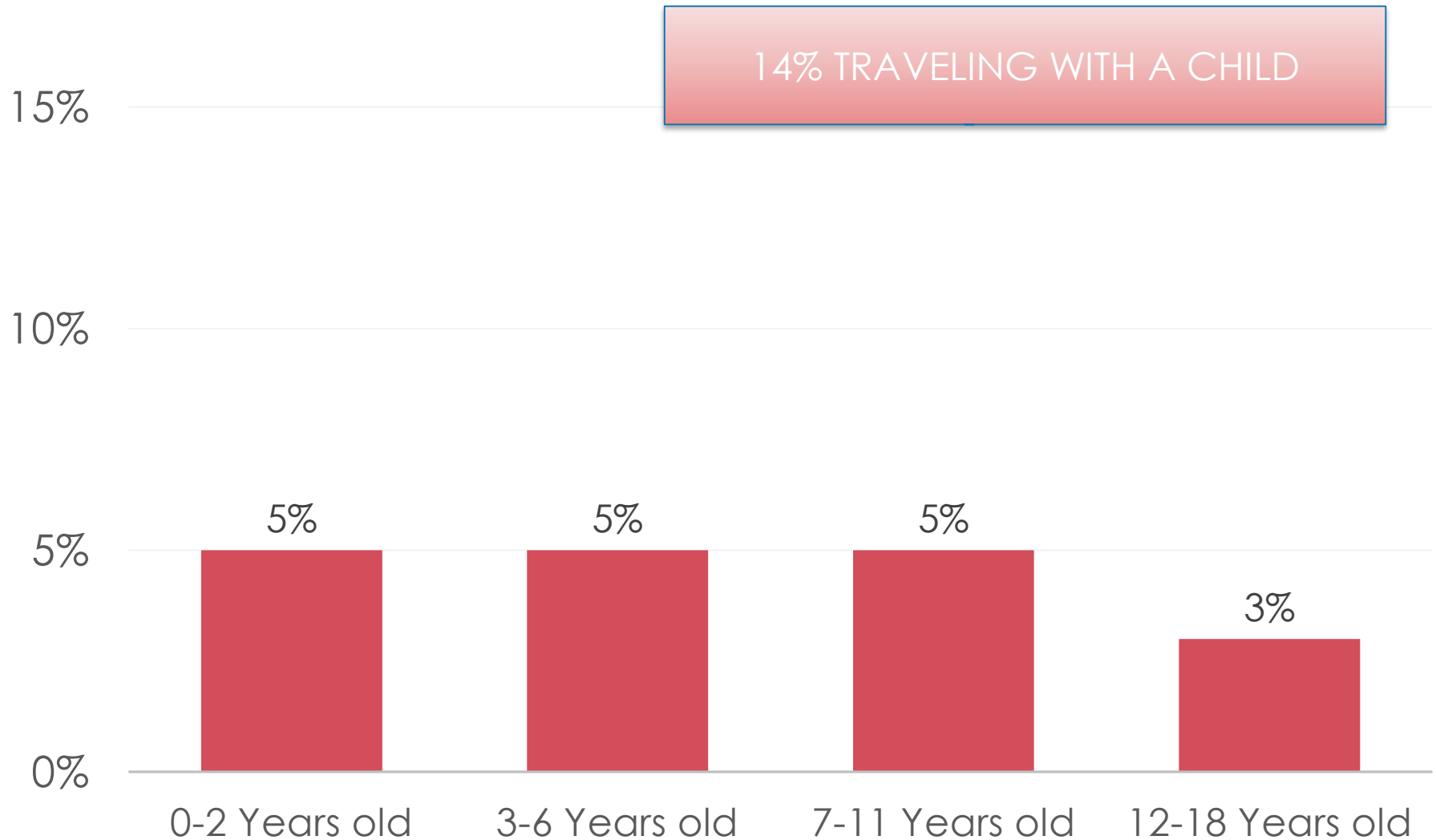
# Travel Party



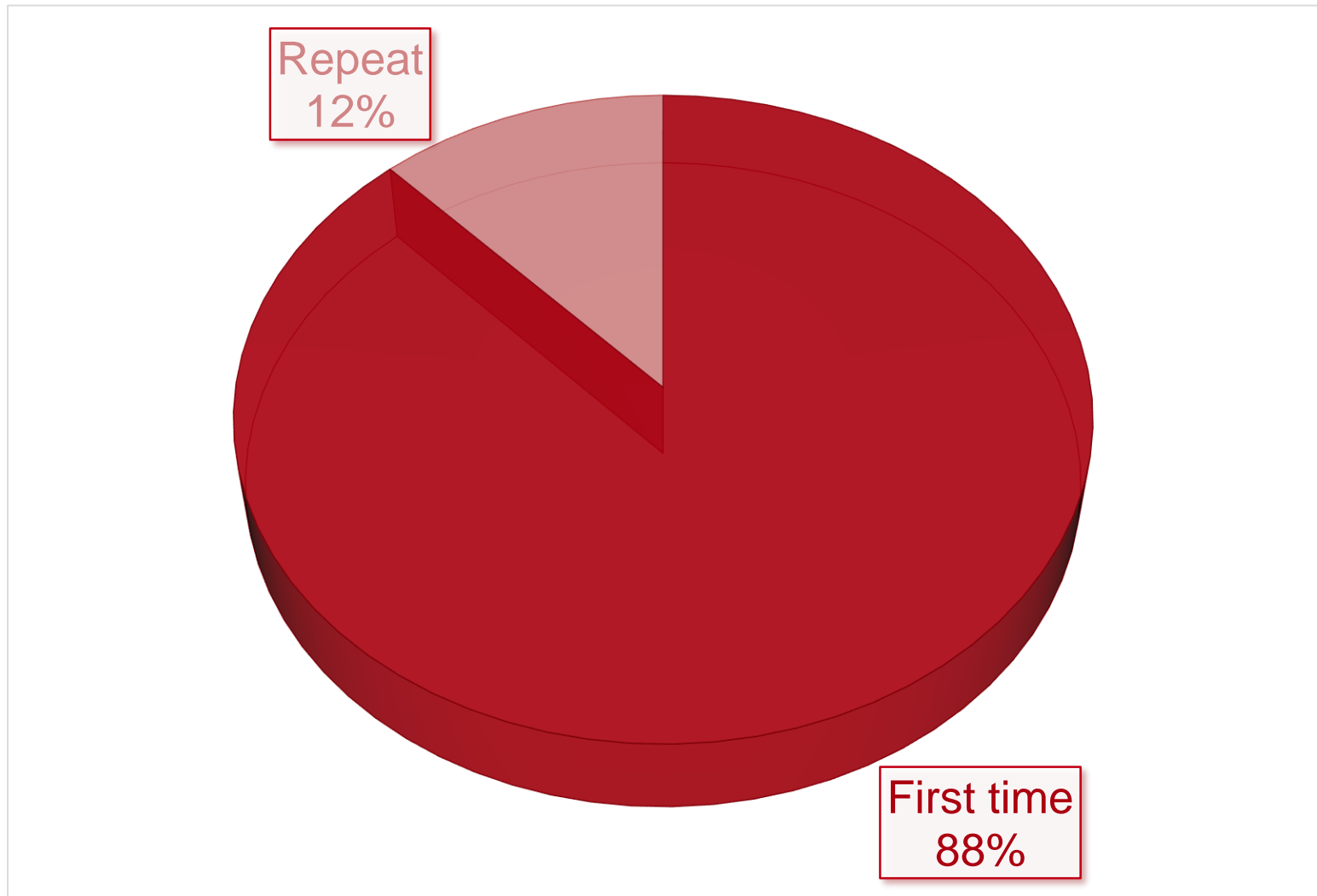
Spouse	38%	44%		
Child <18	7%	14%		
Friend/ Assoc	28%	26%		
Other Adult Family	12%	13%		
Alone	11%	7%		
Girlfriend/ Boyfriend	15%	10%		
Child- Adult		1%		
Office	10%	13%		



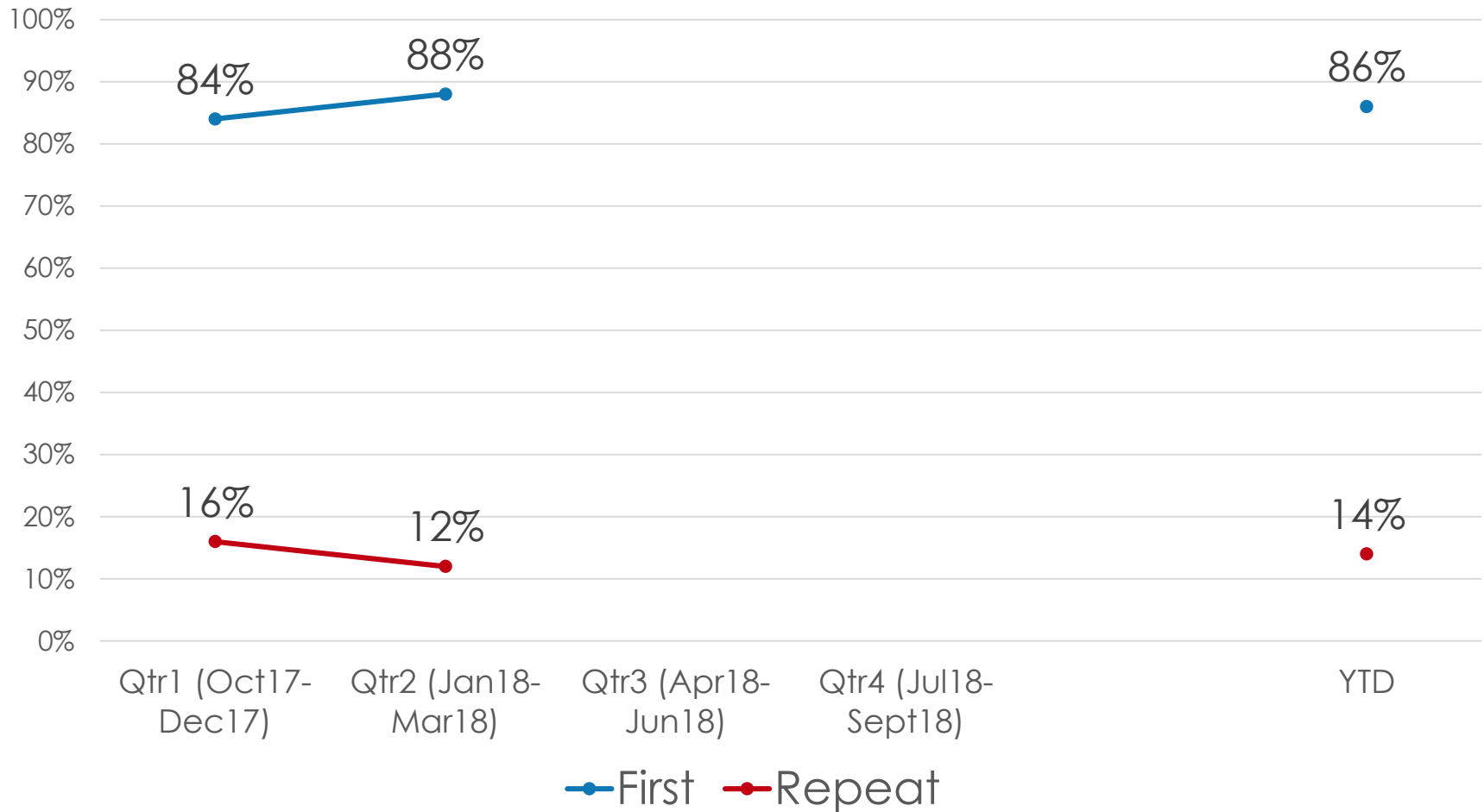
# Travel Party - Children



# Trips to Guam



# Trips to Guam – FY2018 Tracking



# Trips to Guam – Key Segments

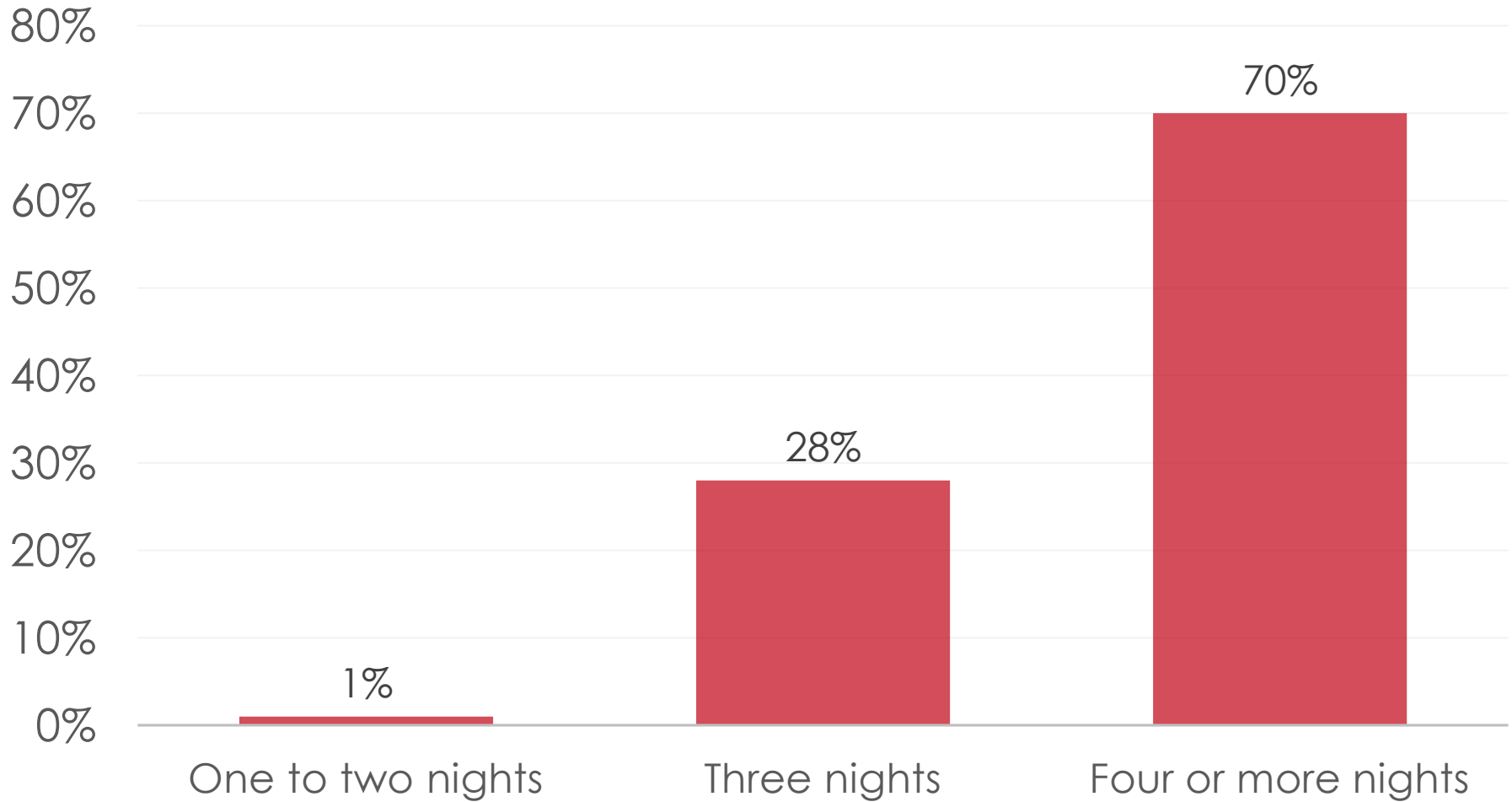
**GVG EXIT SURVEY**  
**Q3 Including this trip, how many times have you visited Guam?**

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOON
		-	-	-	-	-
Q3	1st Time	88%	86%	94%	67%	96%
	Repeat	12%	14%	6%	33%	4%
	Total	159	7	109	3	25
Q3A	Mean	1.32	2.00	1.12	1.33	1.16
	Median	1	1	1	1	1

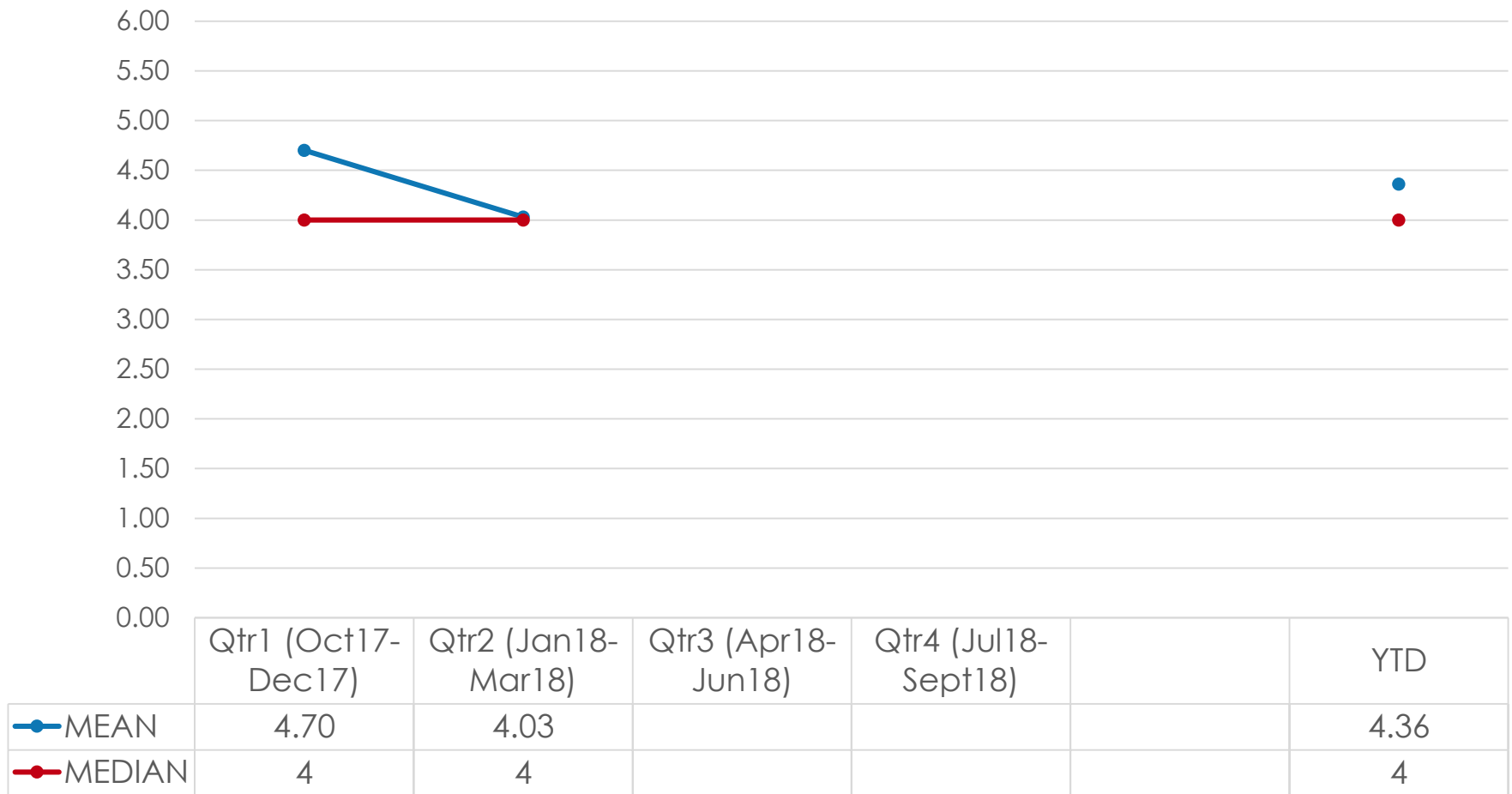
Prepared by Anthology Research

# Length of Stay

MEAN NUMBER OF NIGHTS = 4.03  
MEDIAN NUMBER OF NIGHTS = 4



# Length of Stay – FY2018 Tracking



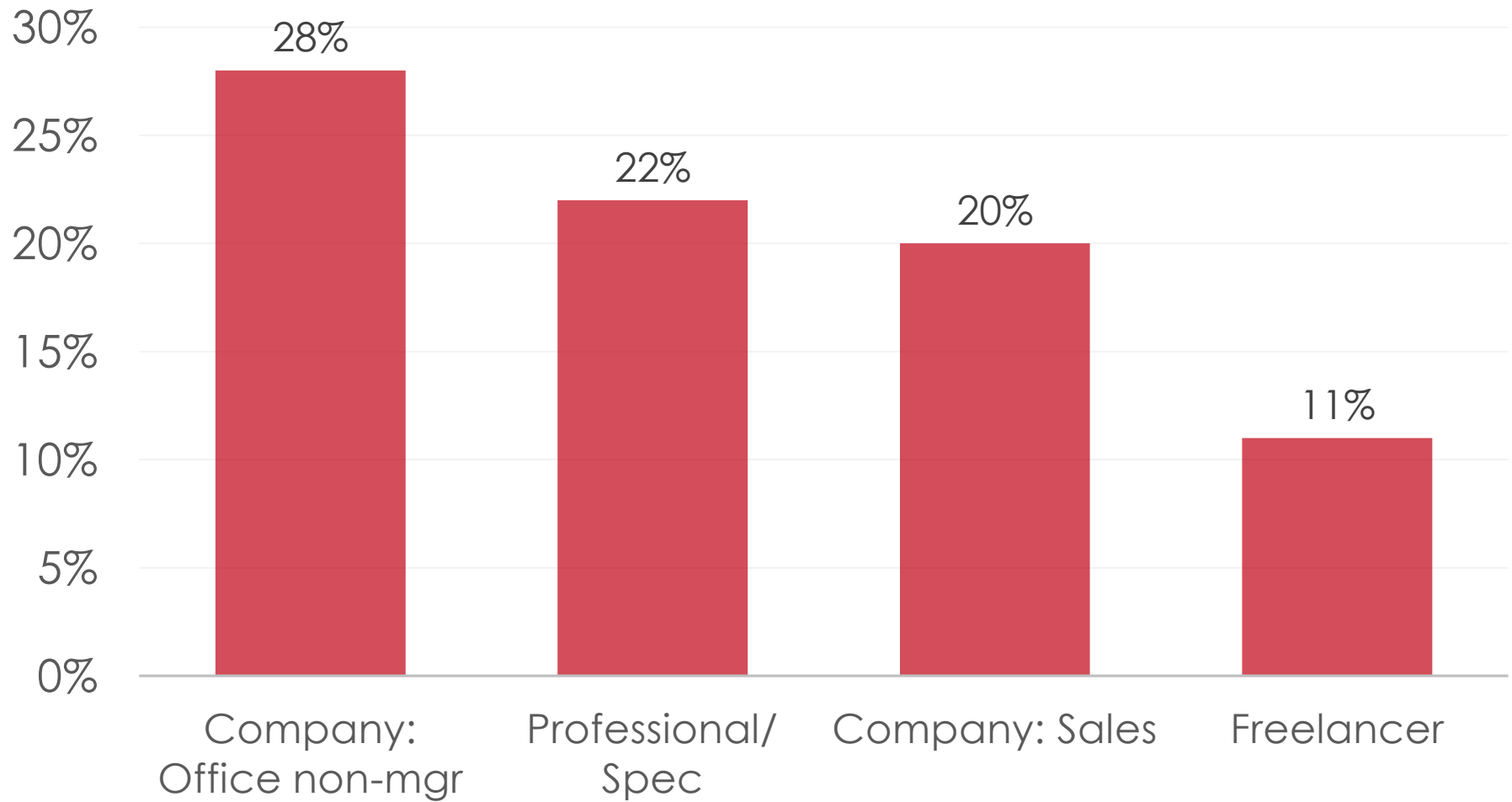
# Length of Stay – Key Segments

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

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOON
		-	-	-	-	-
SA	1-2	1%				
	3	28%	14%	25%		20%
	4+	70%	86%	75%	100%	80%
	Total	159	7	109	3	25
SA	Mean	4.03	4.29	4.18	5.67	4.16
	Median	4	4	4	4	4

Prepared by Anthology Research

# Occupation – Top Responses (10%+)

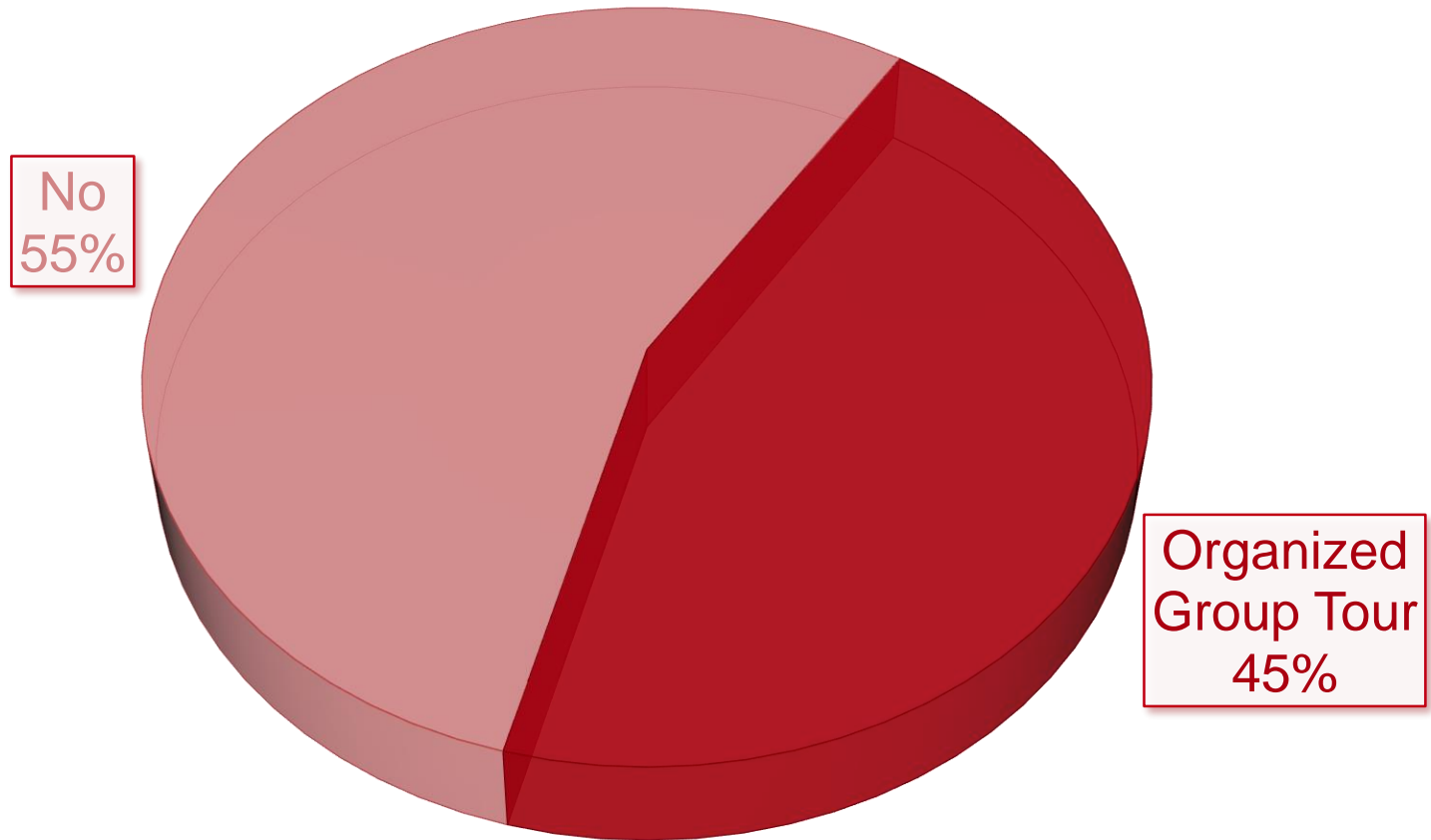




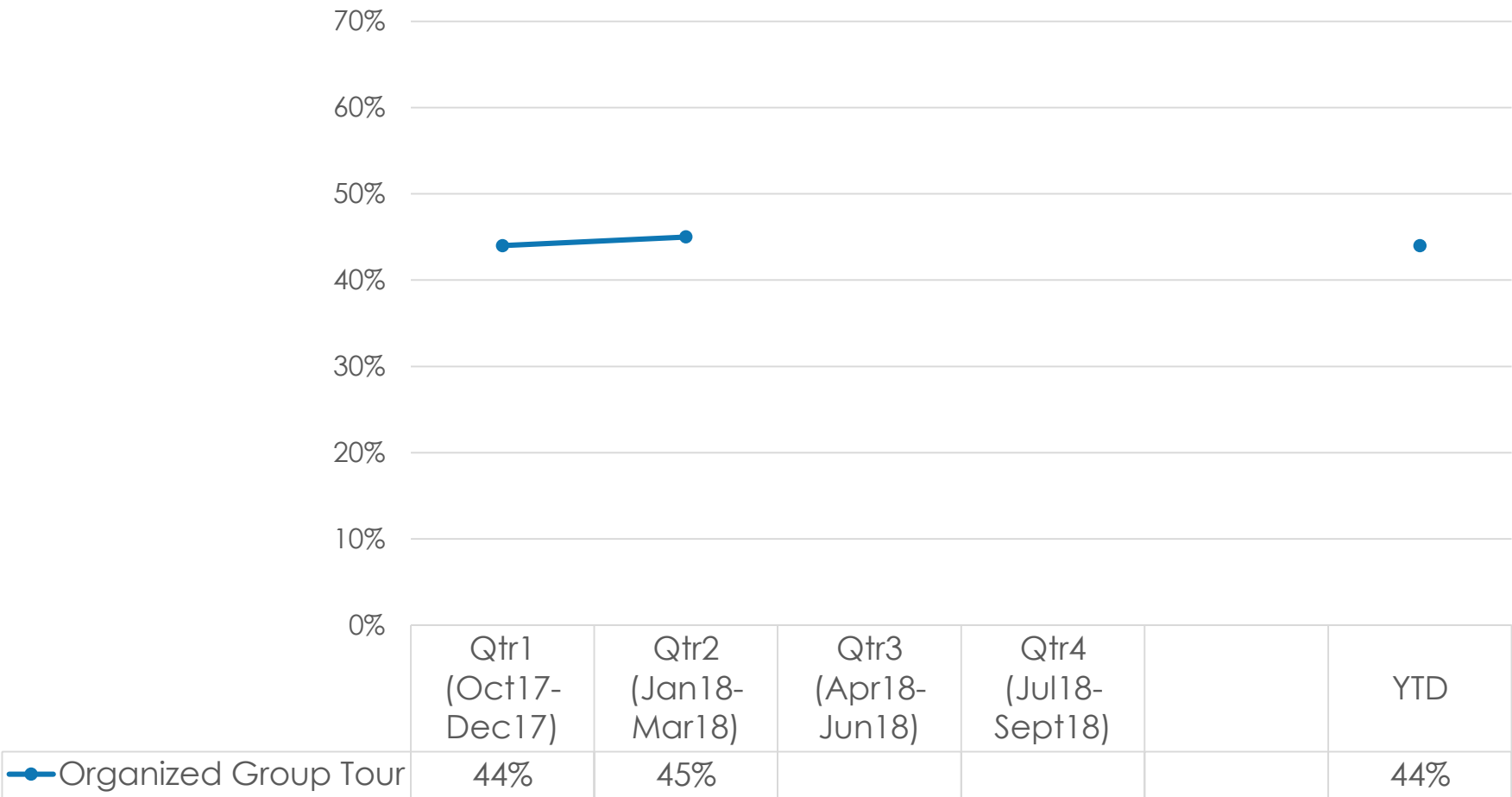
# SECTION 2

# TRAVEL PLANNING

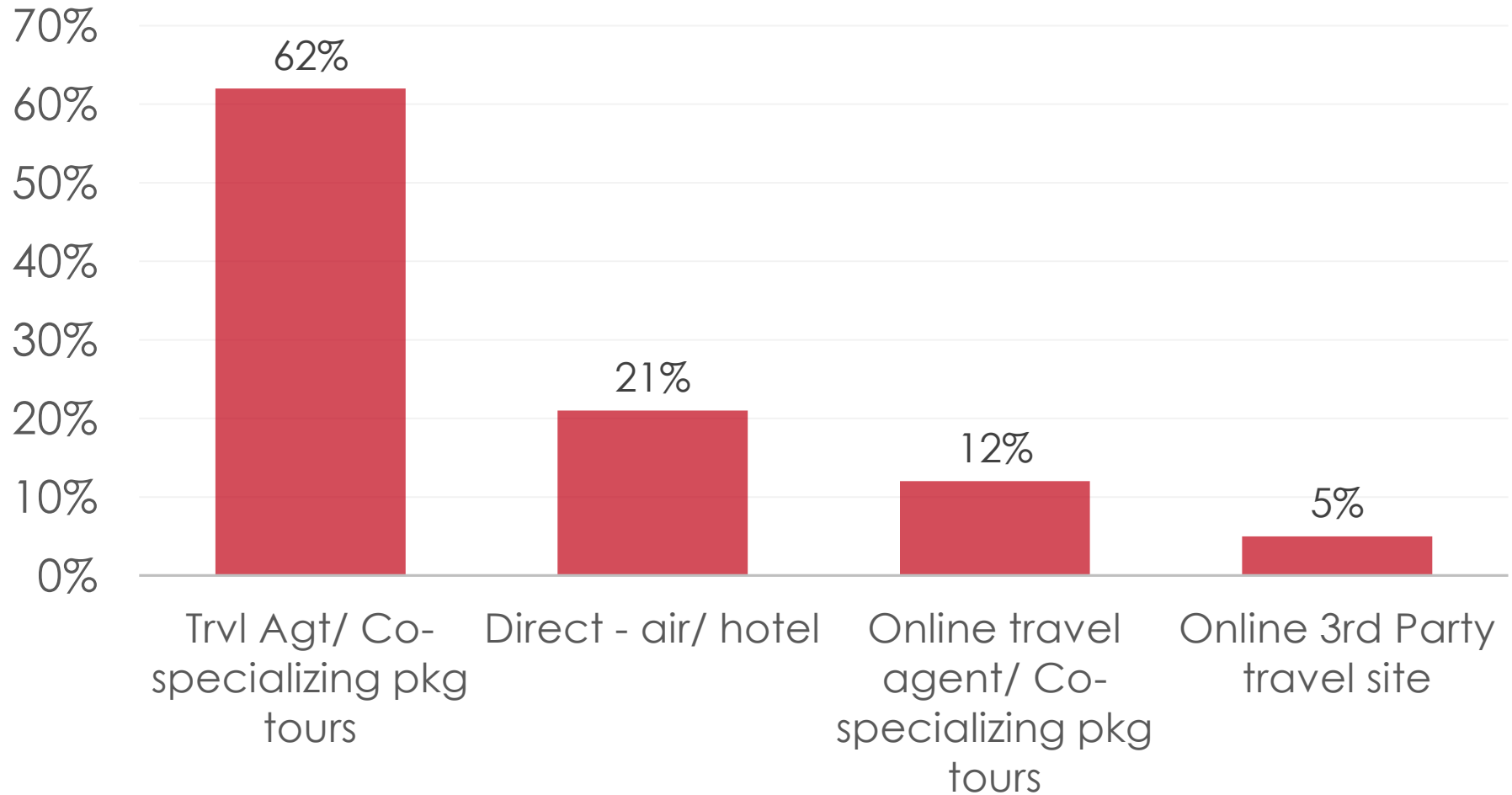
# Organized Group Tour



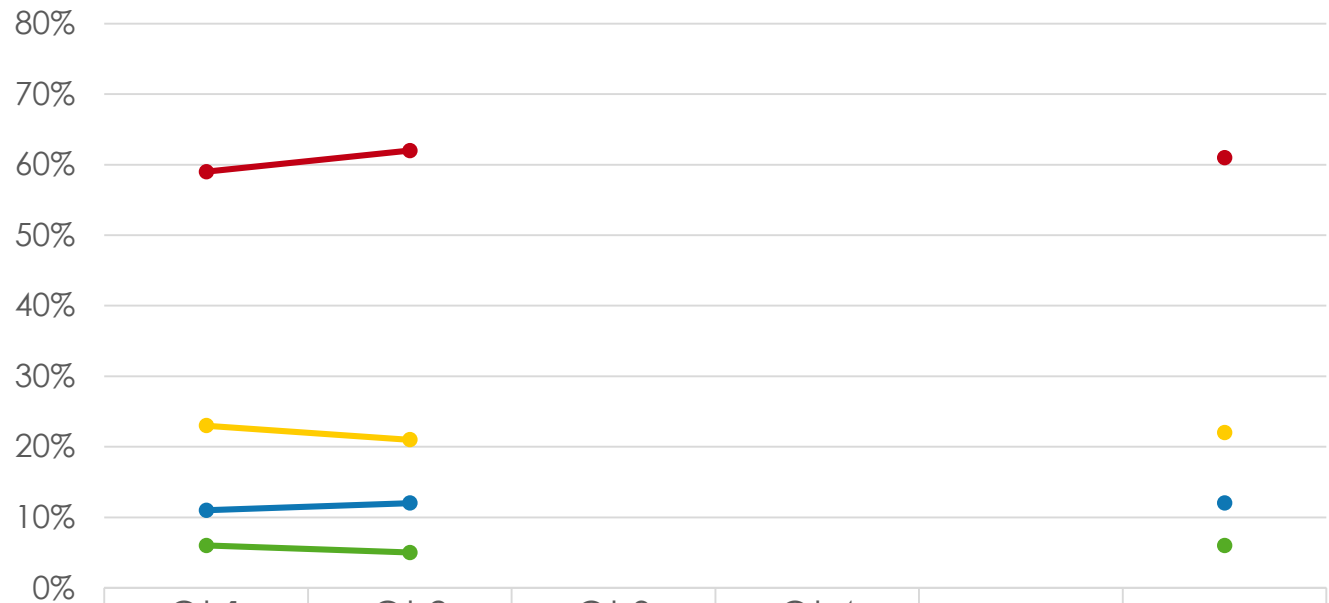
# Organized Group Tour



# Travel Arrangements - Sources

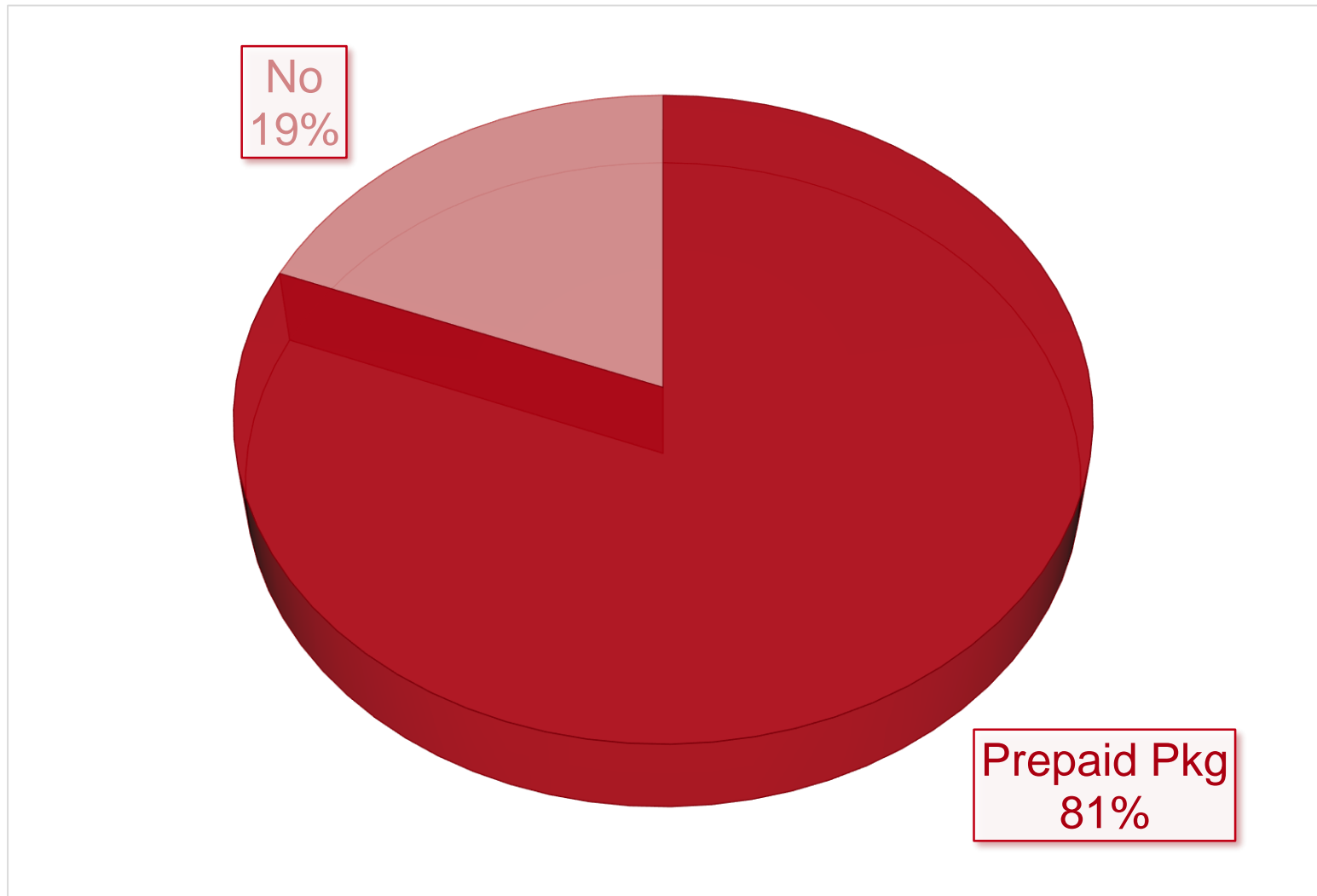


# Travel Arrangements - Sources

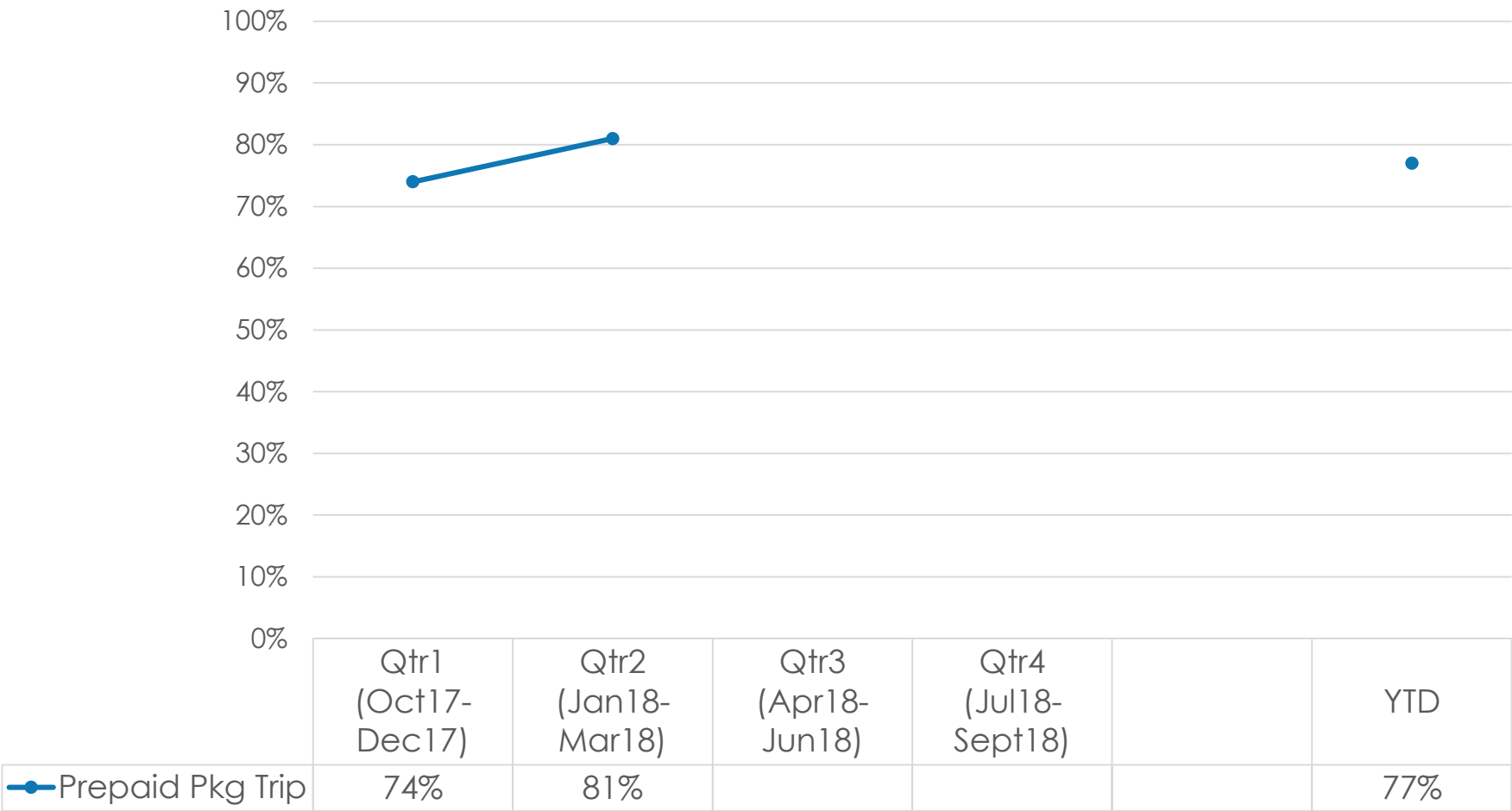


	Qtr1 (Oct17- Dec17)	Qtr2 (Jan18- Mar18)	Qtr3 (Apr18- Jun18)	Qtr4 (Jul18- Sept18)	YTD
Online travel agent	11%	12%			12%
Trvl Agt/ Co- Pkg Tour	59%	62%			61%
Online 3rd Party	6%	5%			6%
Direct Air/ Hotel	23%	21%			22%

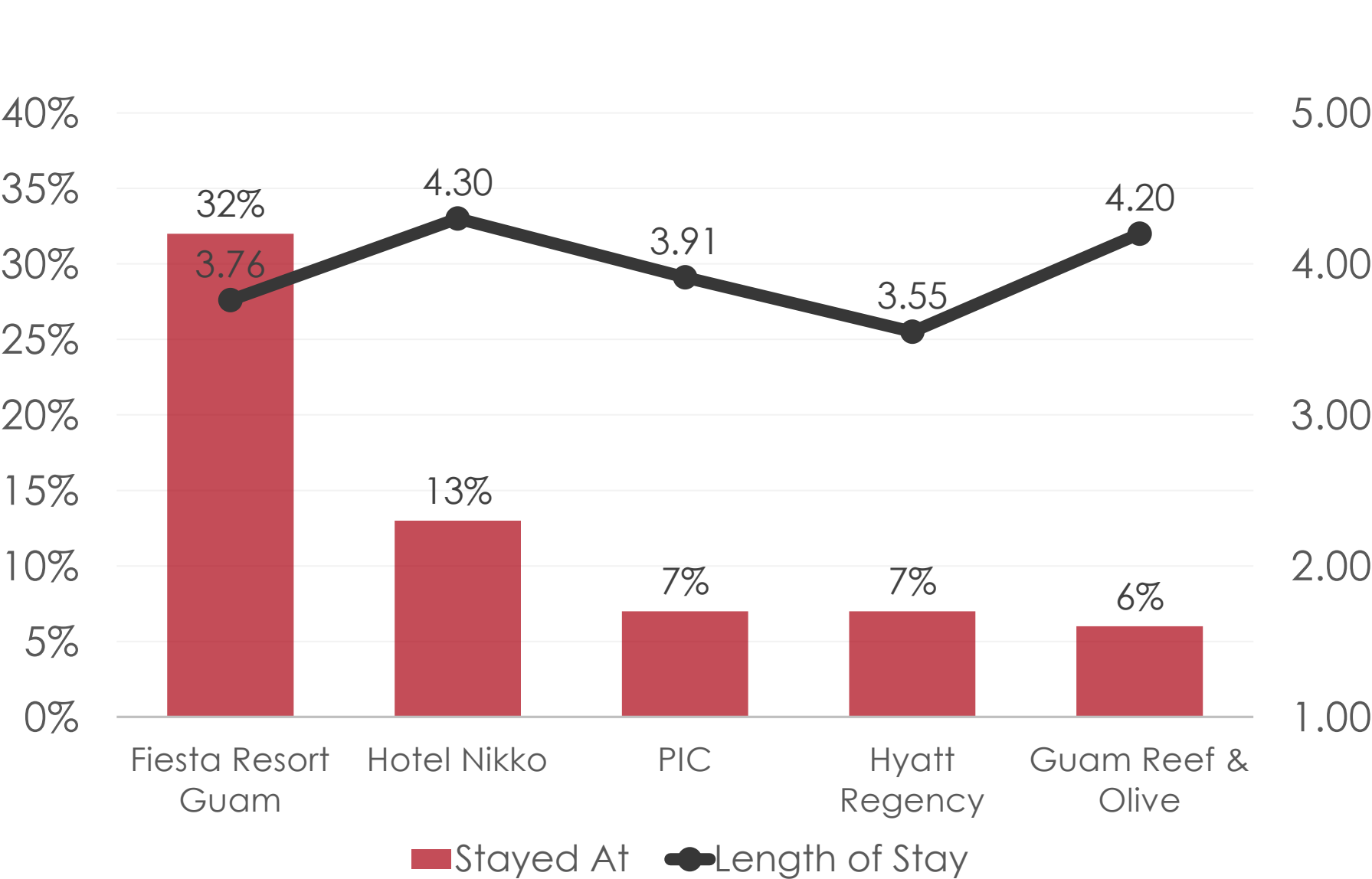
# Prepaid Package Trip



# Prepaid Package Trip

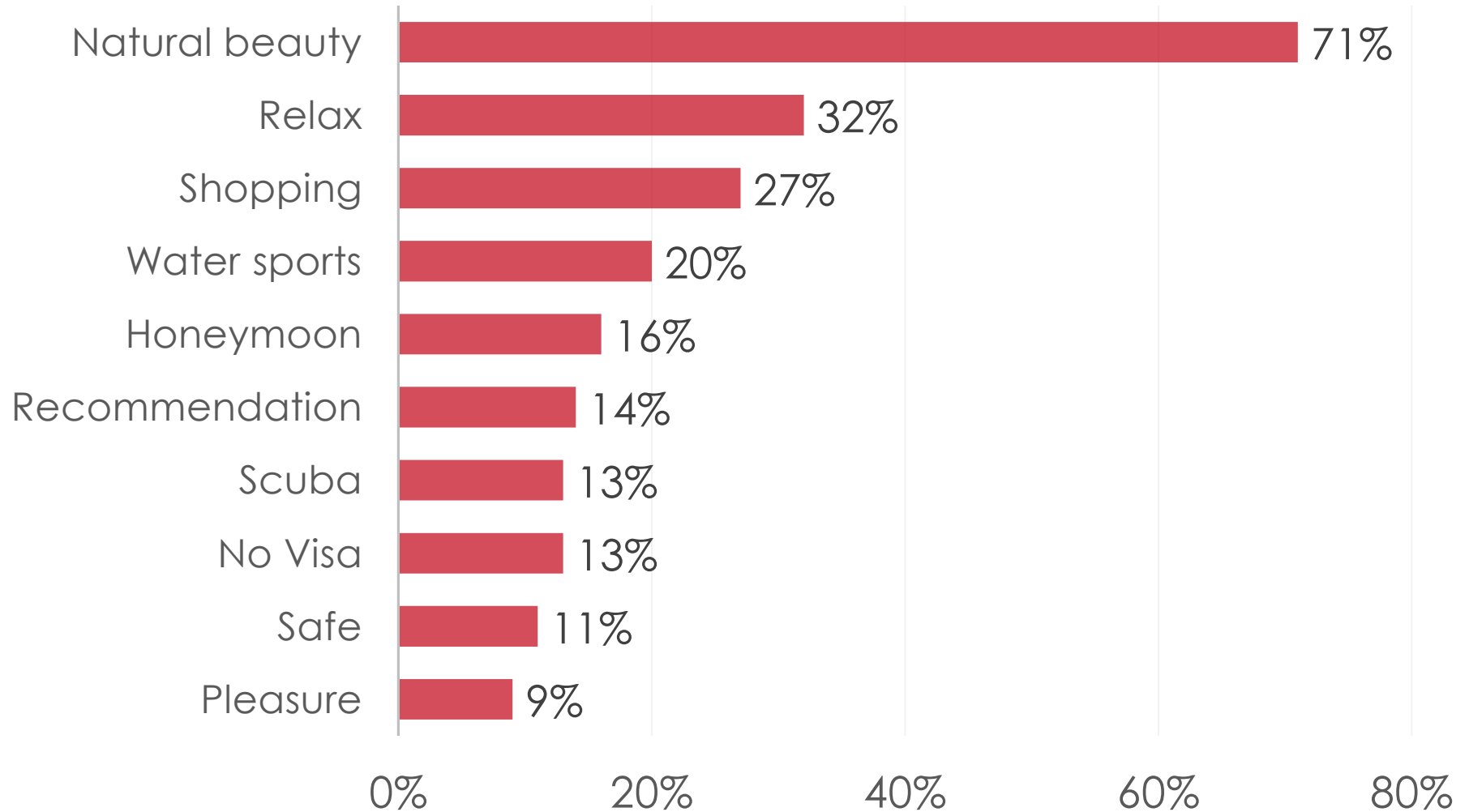


# Accommodations (Top Responses/ 5%+)





# 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	71%	43%	71%	67%	76%
Just to relax	32%		28%		16%
Shopping	27%	14%	26%		40%
Water sports (snorkeling, windsurfing, parasailing)	20%		28%	33%	12%
Honeymoon	16%		17%		100%
Recommendation of friend/ relative/ travel agency	14%		12%		
Scuba diving	13%	29%	19%		12%
No Visa required	13%		11%		12%
It is a safe place to spend a vacation	11%		6%		
Pleasure/ vacation	9%		11%		4%
A previous visit	8%	14%	6%		
Incentive trip	4%	100%	6%		
Price of the tour package	3%		3%		4%
To visit friends or relatives	3%		3%		
Adventure	3%		3%		
Short travel time (not too far from home)	2%		2%		4%
To Get Married/ attend Wedding	2%		3%	100%	
Company/ business trip	1%				
School trip	1%		2%		
Career certification/ testing	1%				
Organized sporting activity/ event	1%		1%		
Government or military	1%		1%		
Total	158	7	109	3	25

# SECTION 3

# EXPENDITURES

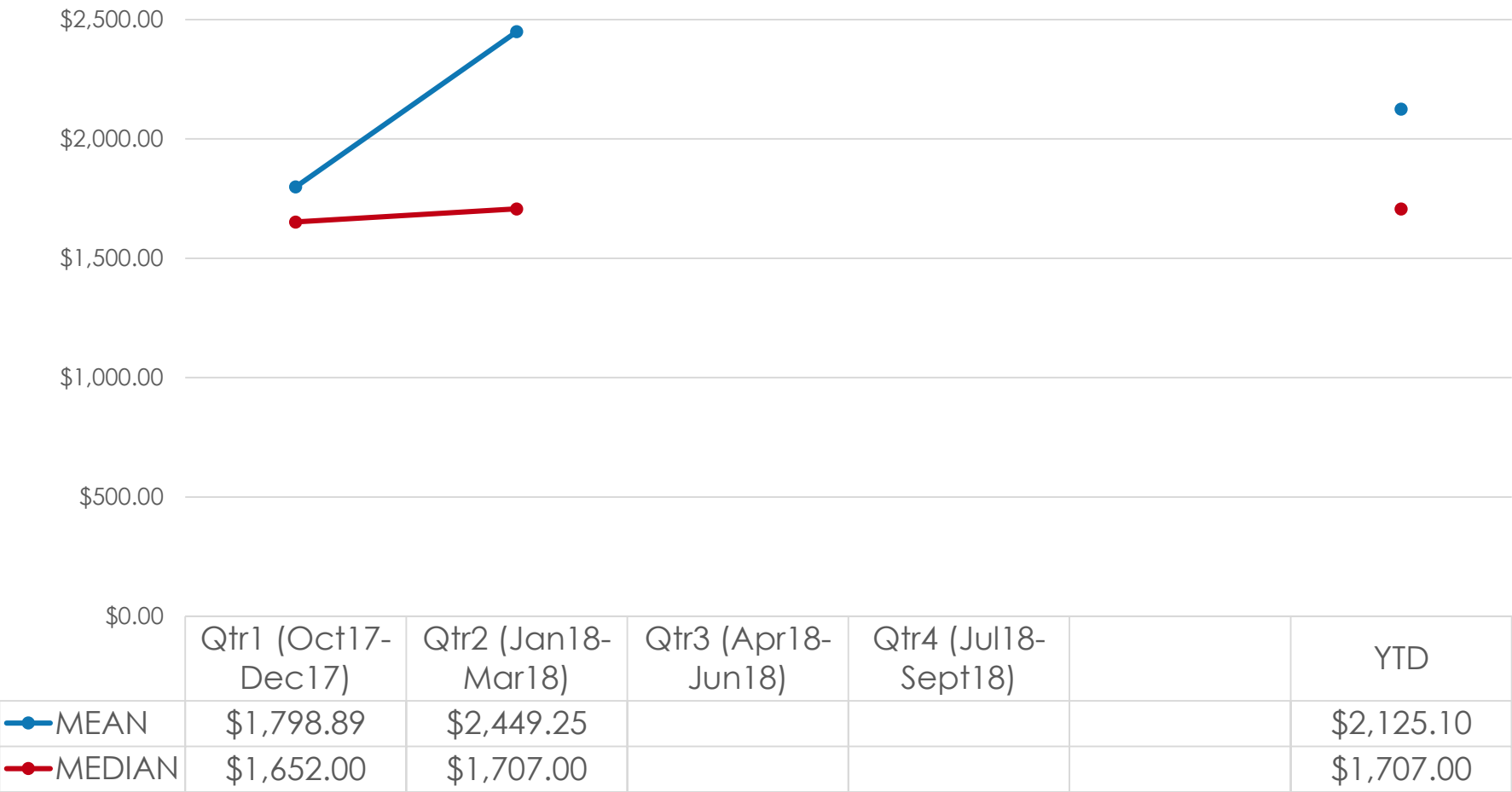
# Prepaid Expenditures

EXCHANGE RATE TWD 29.29=\$1

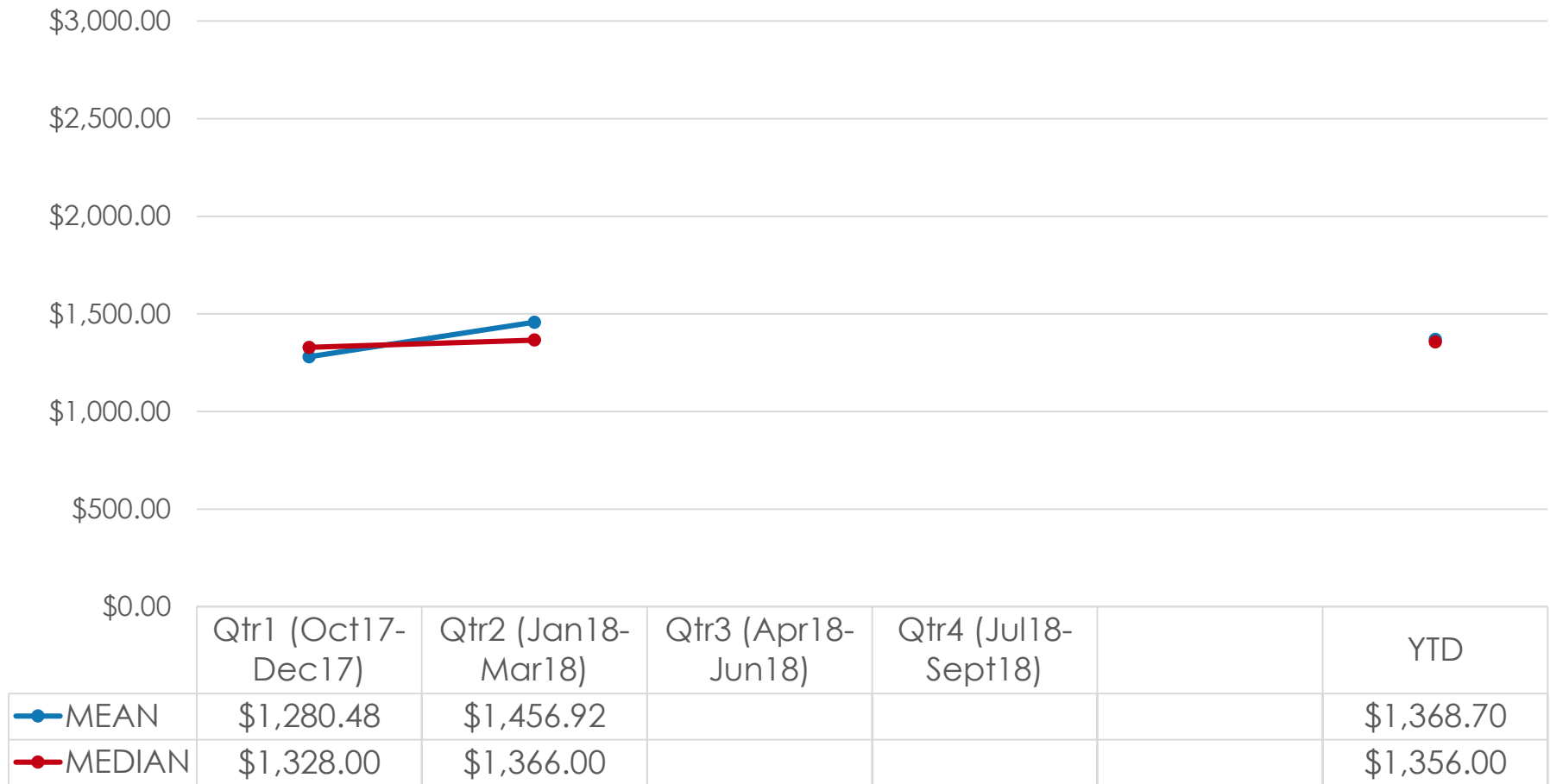
- \$2,449.25 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$1,456.92 = overall mean average per person prepaid expenditures

# Prepaid Entire Travel Party – FY2018

## Tracking



# Prepaid Per Person– FY2018 Tracking



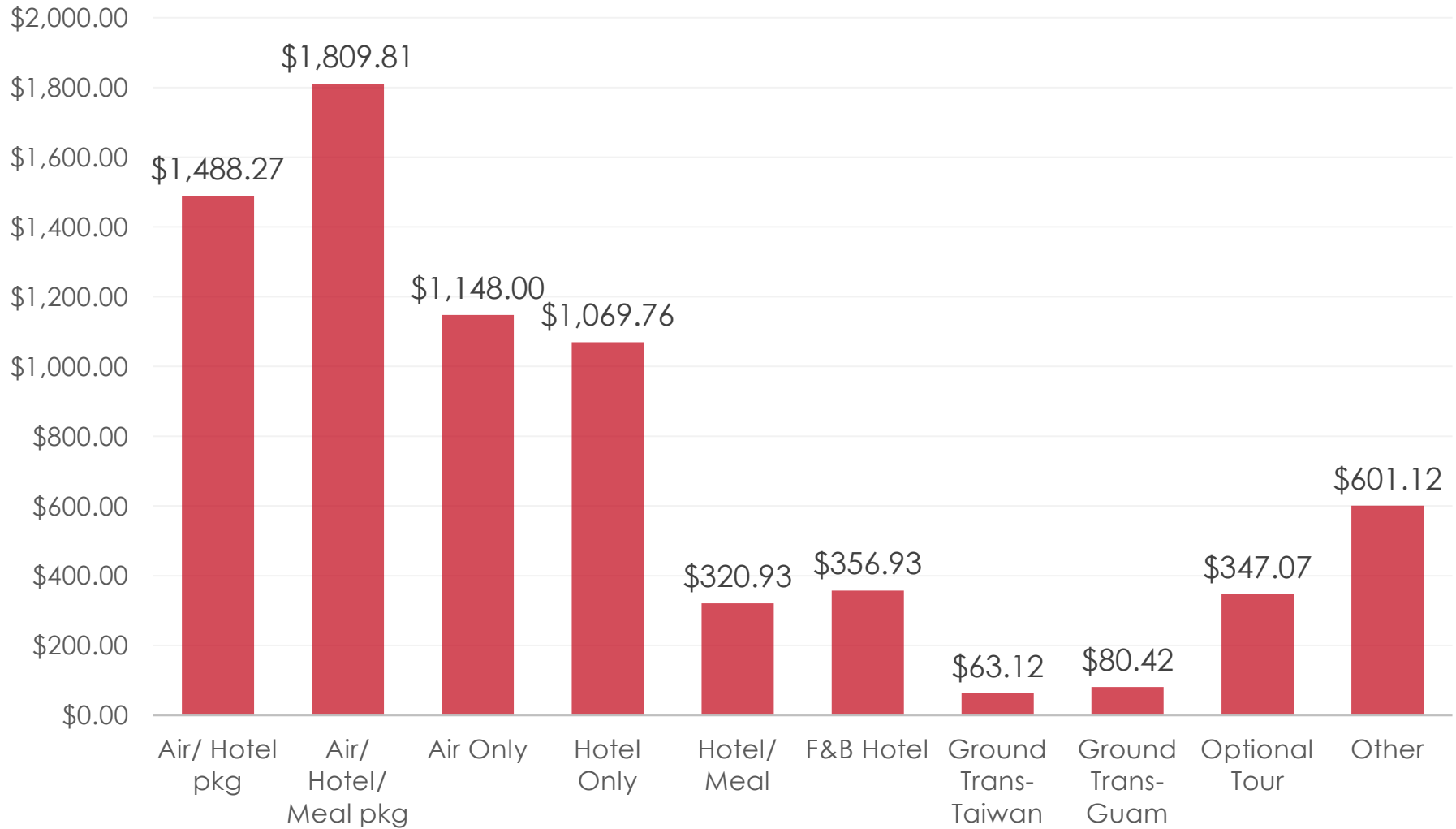
# Prepaid Per Person – Key Segments

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

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOON
		-	-	-	-	-
PREPAID PP	Mean	\$1,456.92	\$1,505.23	\$1,626.90	\$1,251.85	\$1,455.35
	Median	\$1,366	\$1,707	\$1,553	\$1,707	\$1,707

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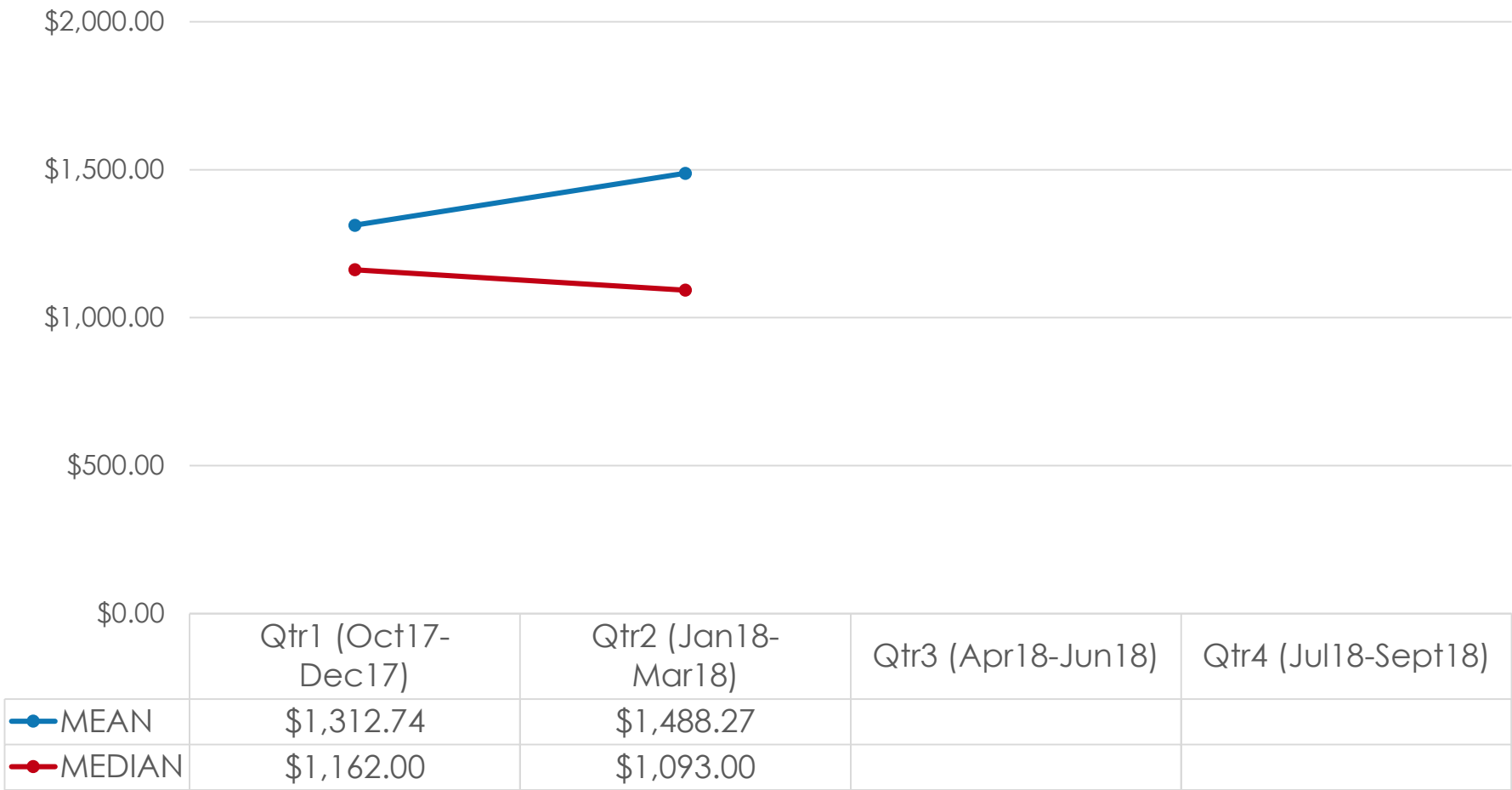
# Prepaid Expenses by Category – MEAN Entire Travel Party





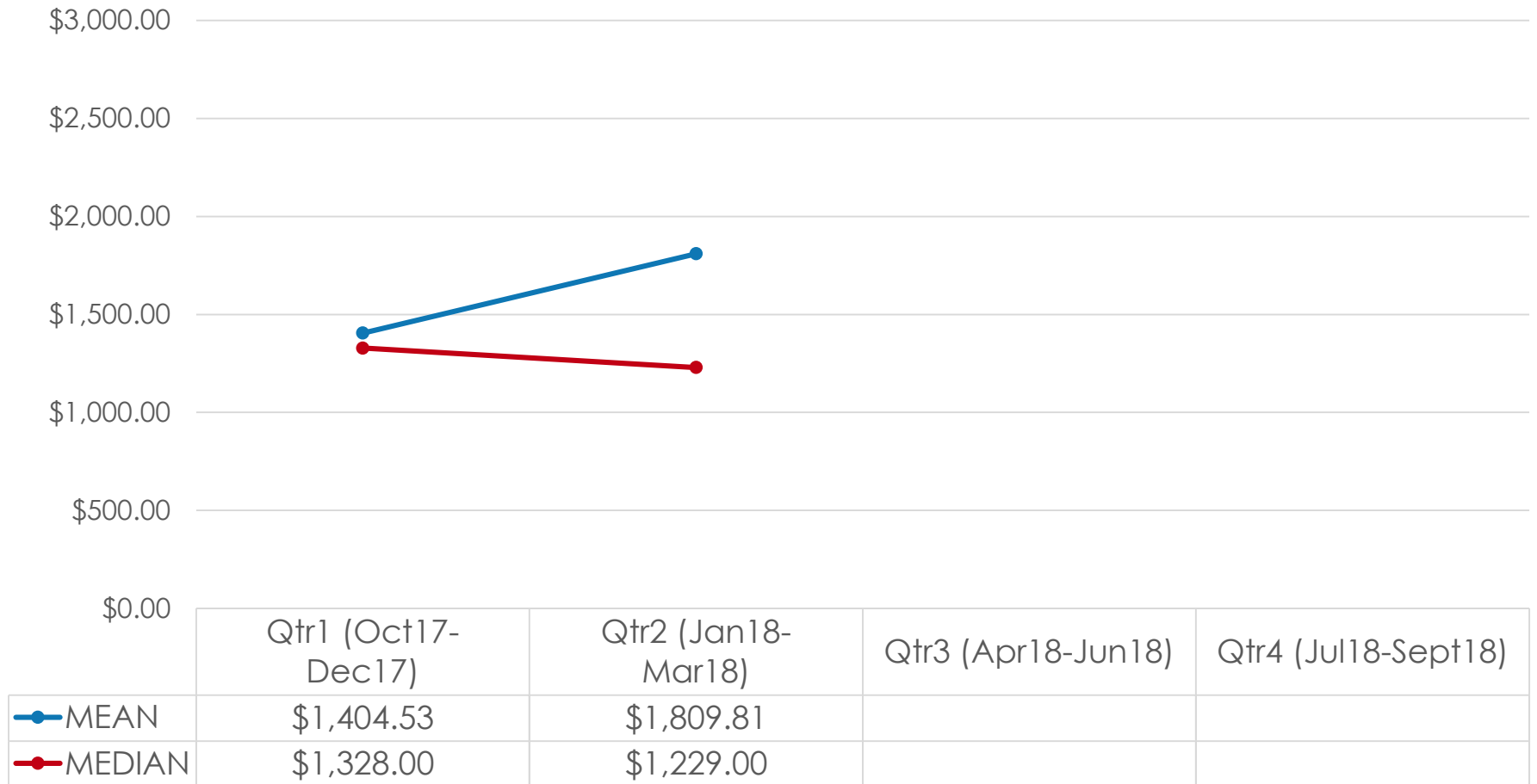
# Prepaid – FY2018 Tracking

## Airfare & Accommodation Packages



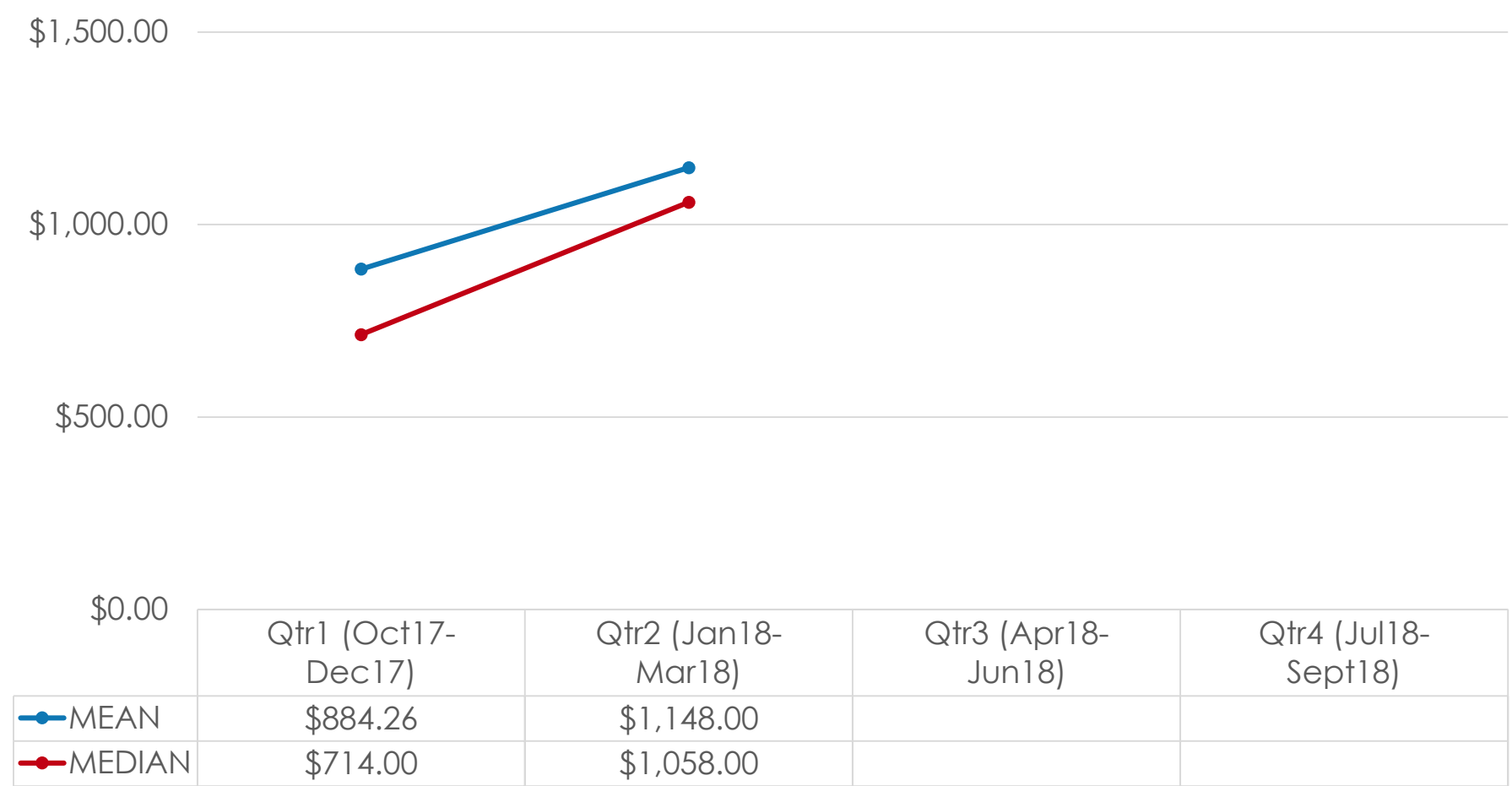
# Prepaid – FY2018 Tracking

## Airfare & Accommodation W/ Meal Packages



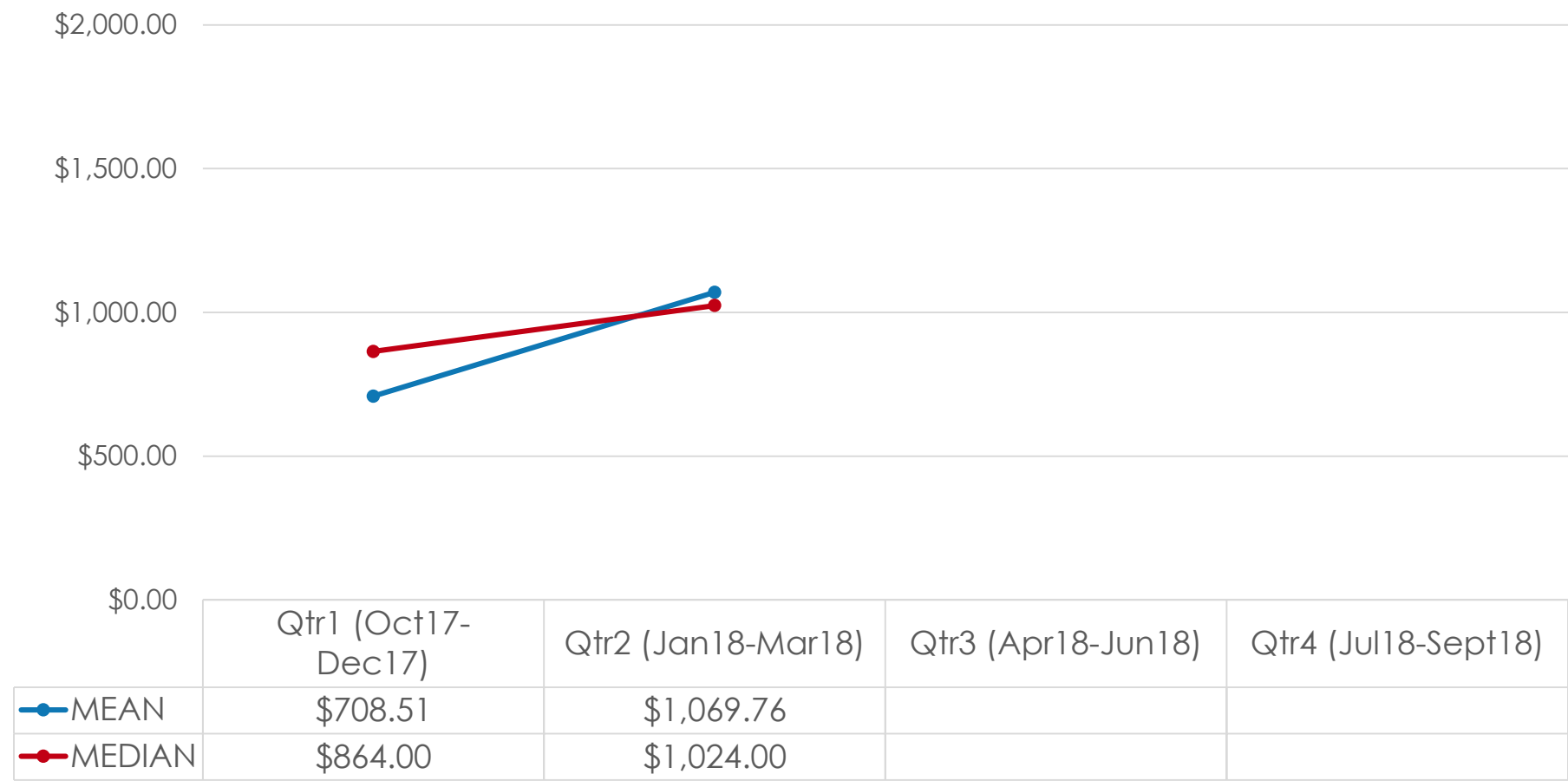
# Prepaid – FY2018 Tracking

## Airfare Only



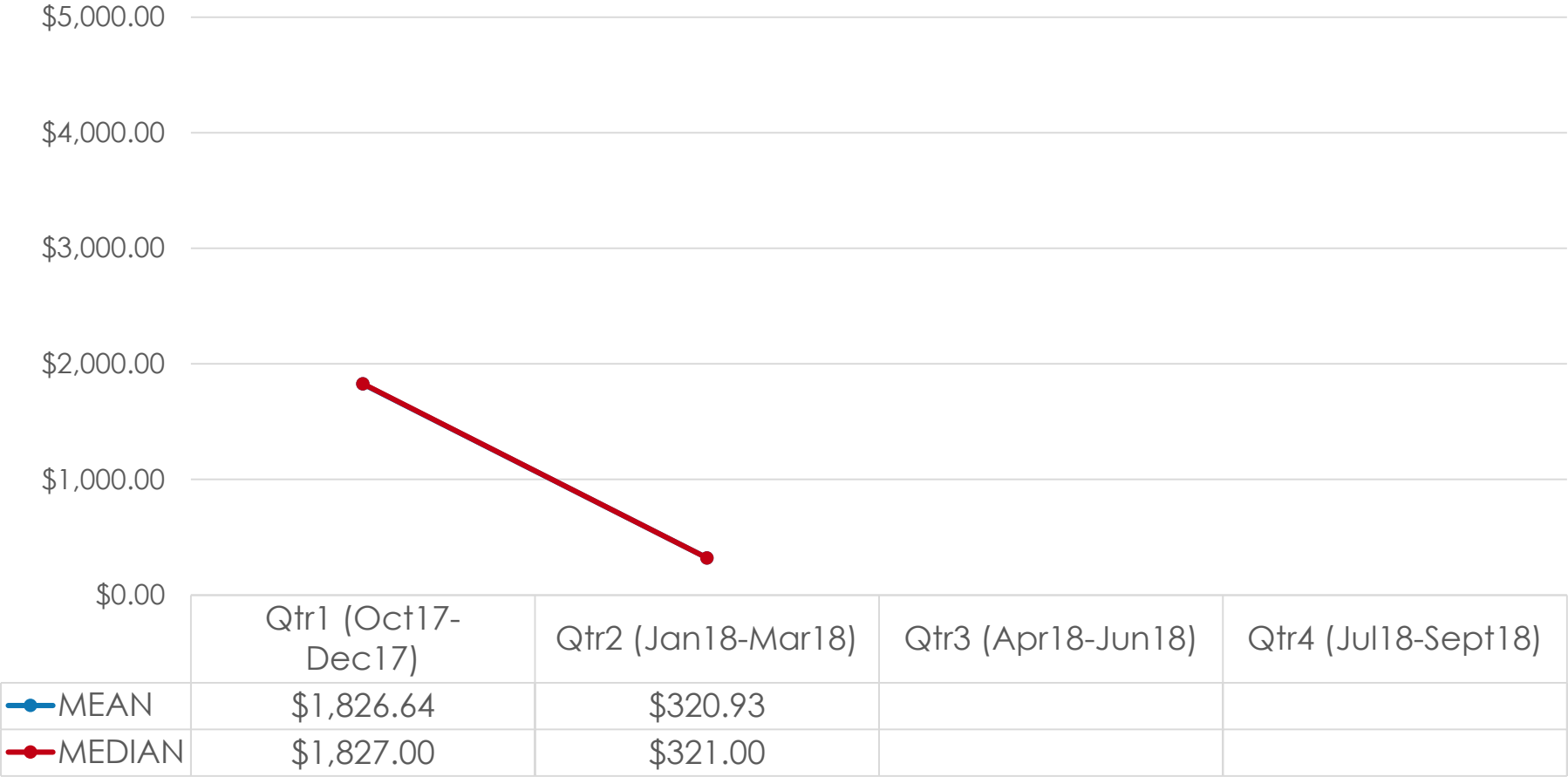
# Prepaid – FY2018 Tracking

## Accommodations Only



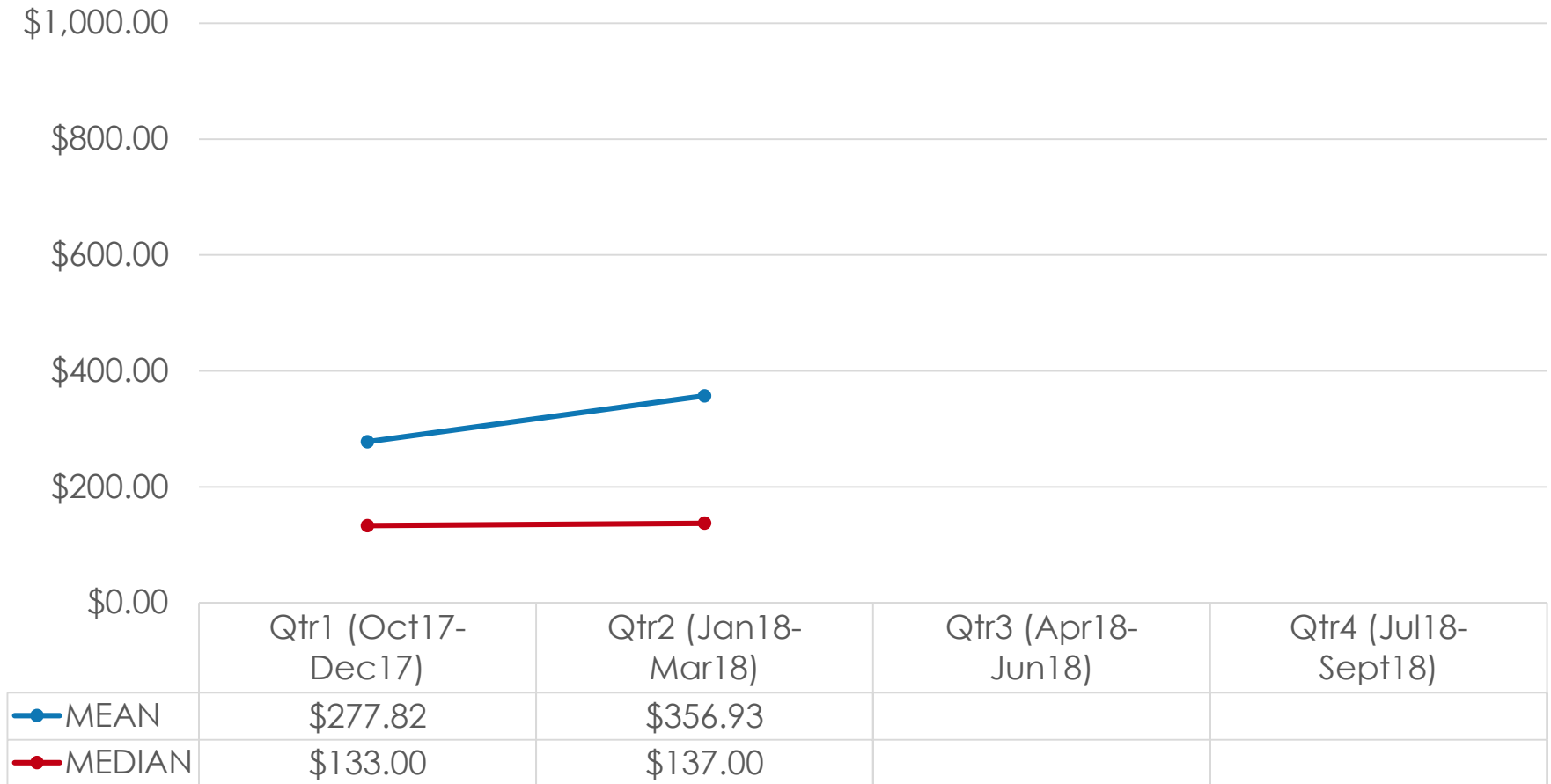
# Prepaid – FY2018 Tracking

## Accommodations w/ Meal Only



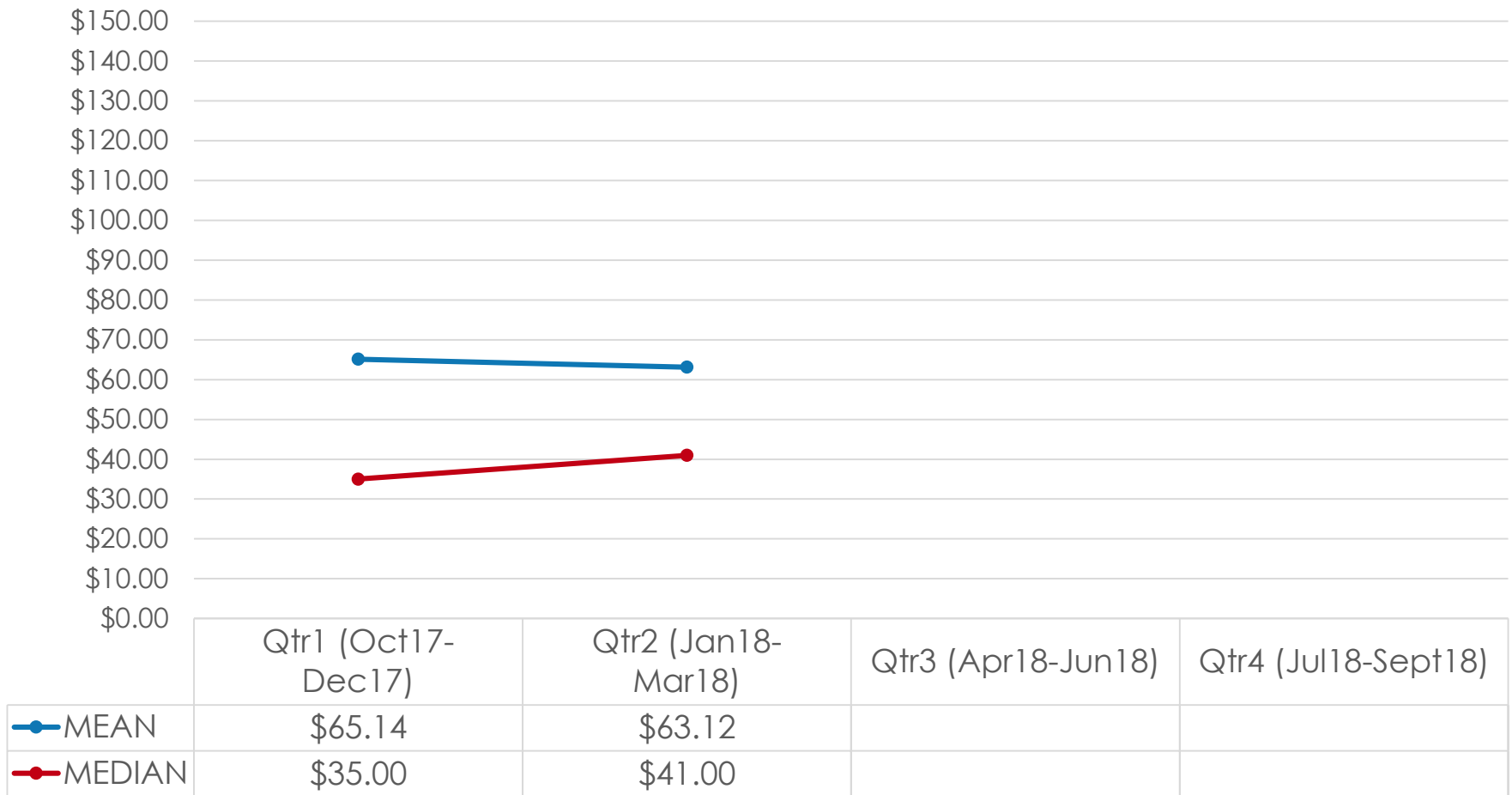
# Prepaid – FY2018 Tracking

## Food & Beverage in Hotel



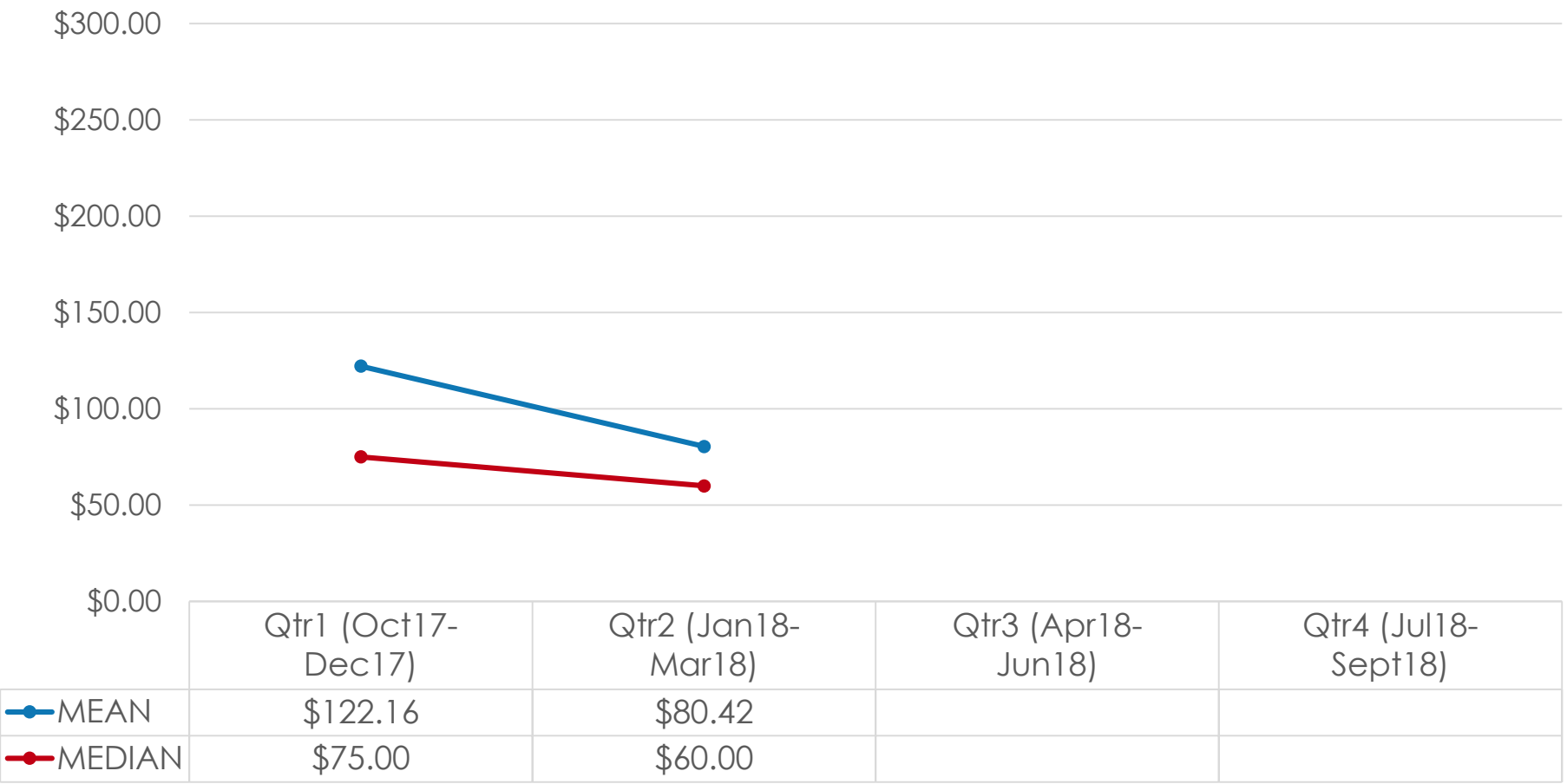
# Prepaid – FY2018 Tracking

## Ground Transportation - Taiwan



# Prepaid – FY2018 Tracking

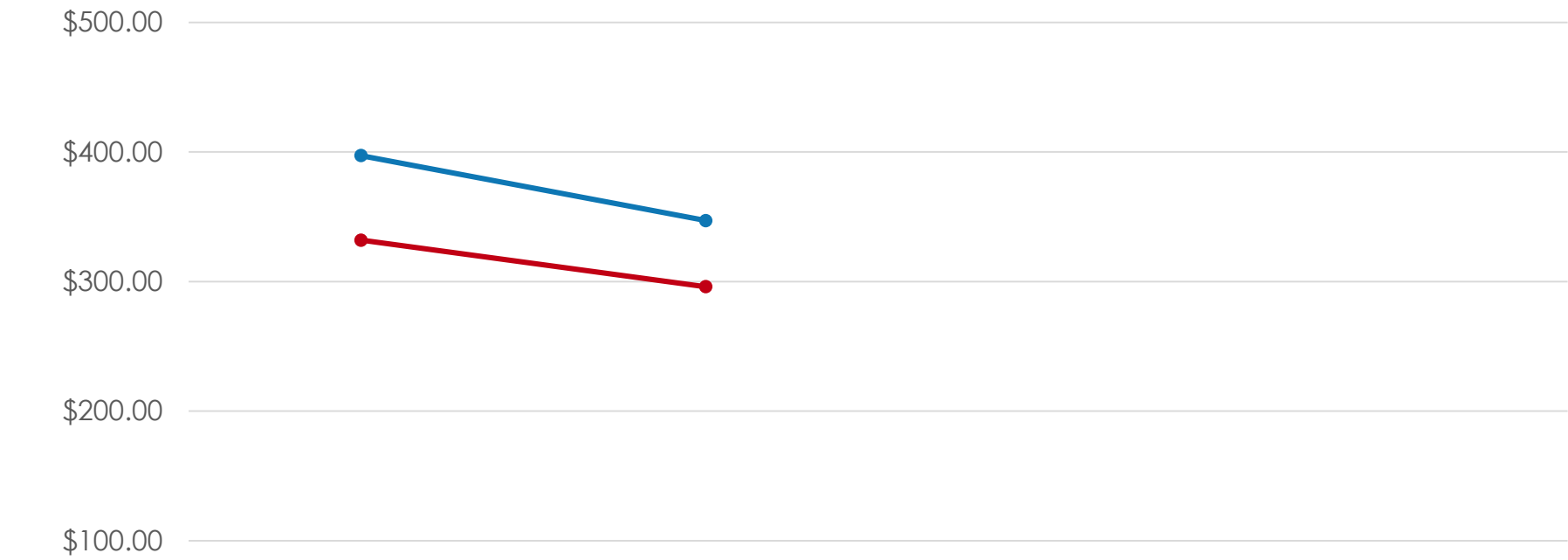
## Ground Transportation - Guam





# Prepaid – FY2018 Tracking

## Optional tours/ Activities

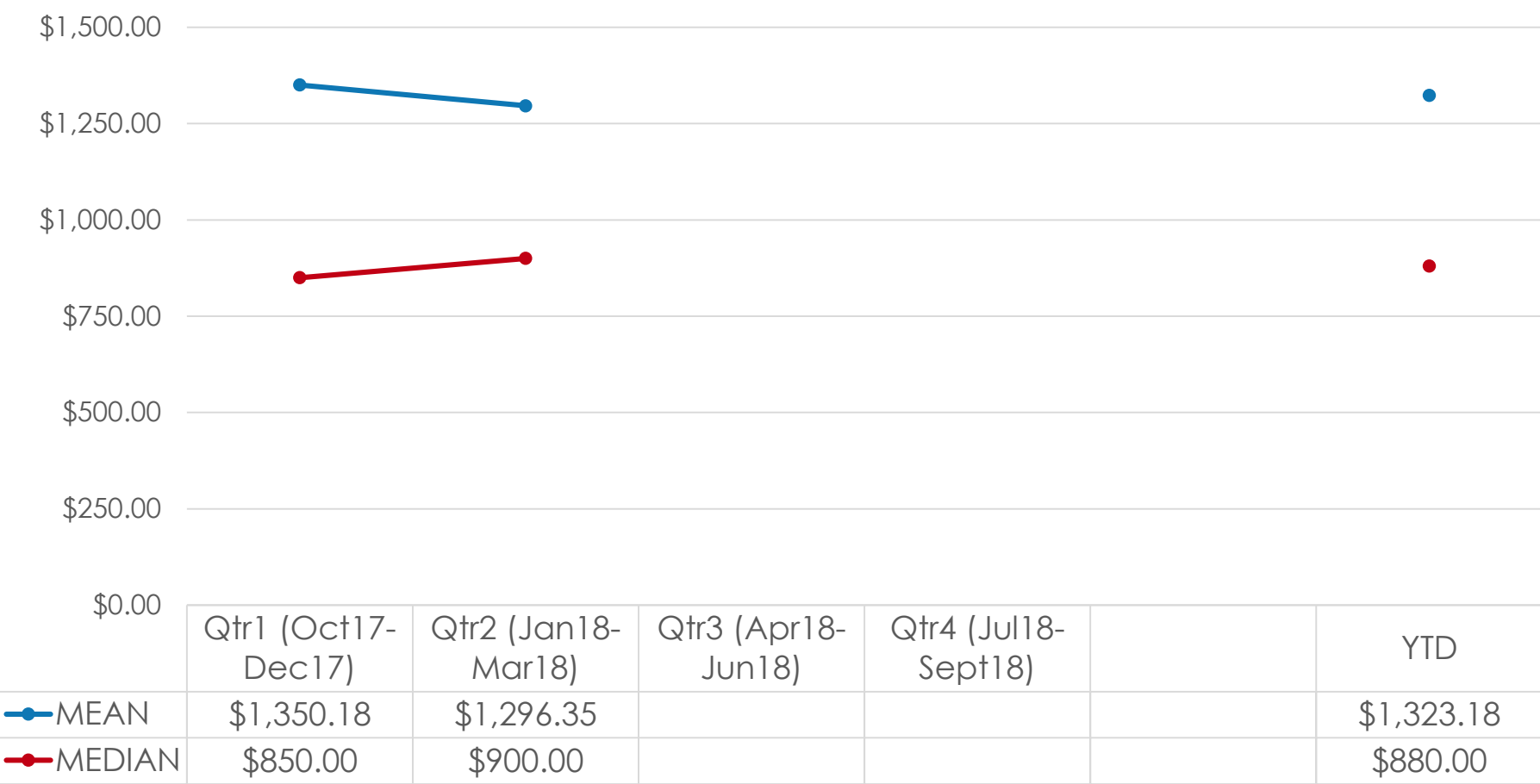


	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	\$397.24	\$347.07		
MEDIAN	\$332.00	\$296.00		

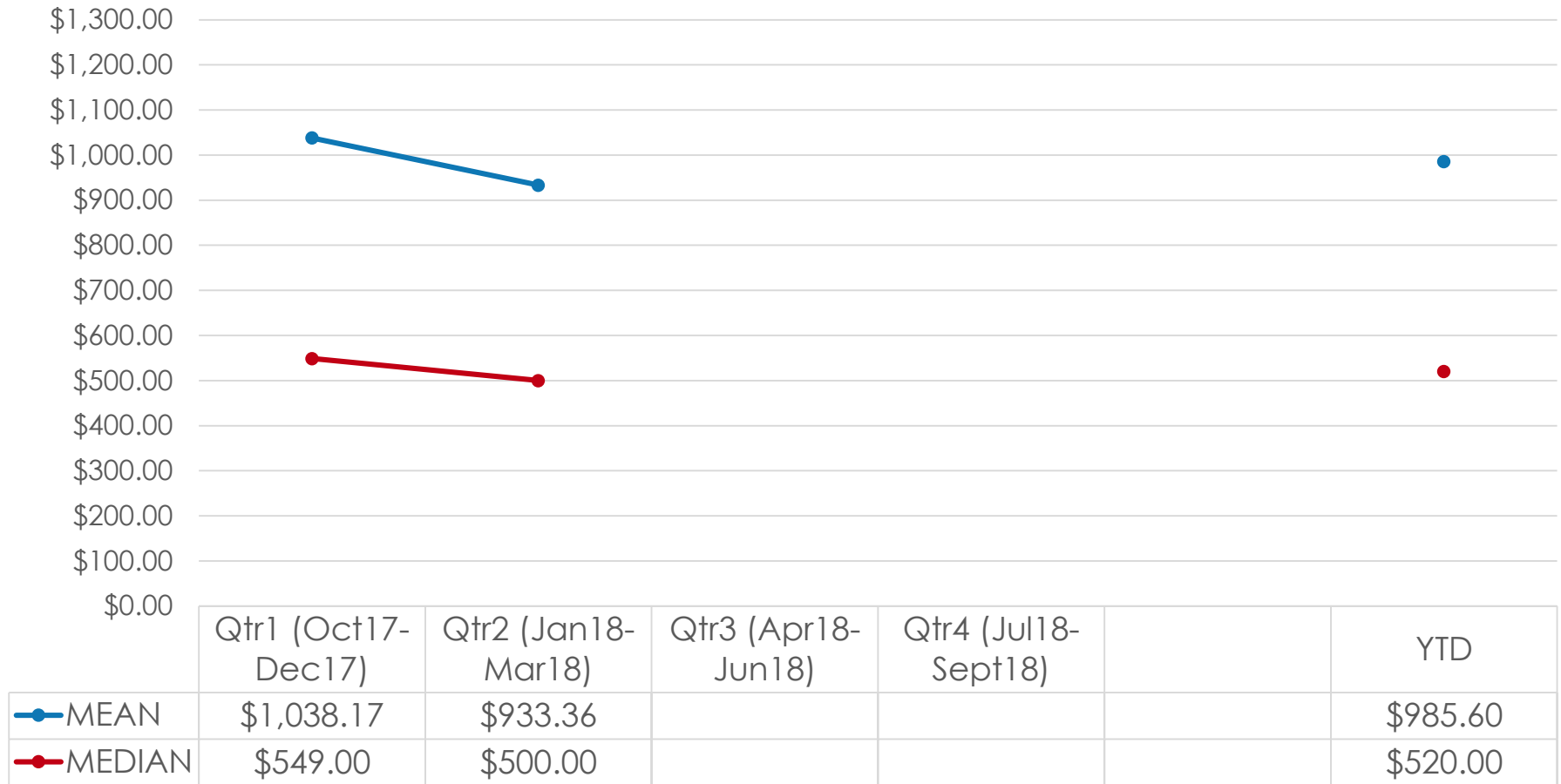
# On-Island Expenditures

- \$1,296.35 = overall mean average on-island expense (for entire travel party size) by respondent
- \$933.36 = overall mean average per person on-island expenditures

# On-Island Entire Travel Party – FY2018 Tracking



# On-Island Per Person – FY2018 Tracking



# On-Island Per Person – Key Segments

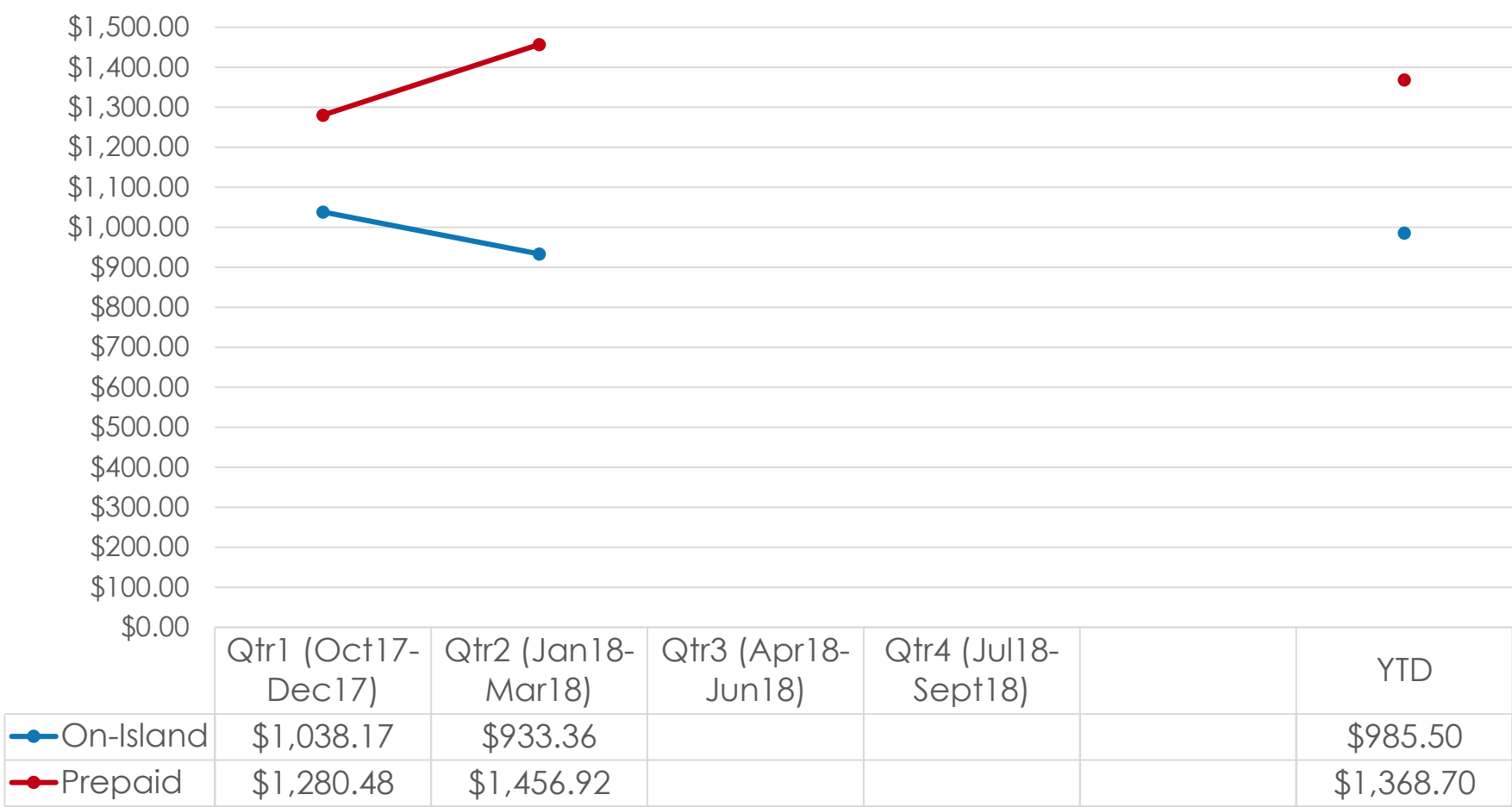
**GVB EXIT SURVEY**  
**Q11A ONISLE EXPENDITURE- PER PERSON**

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOON
		-	-	-	-	-
ONISLE PP	Mean	\$933.36	\$2,290.00	\$1,048.48	\$1,193.33	\$541.69
	Median	\$500	\$700	\$600	\$880	\$500

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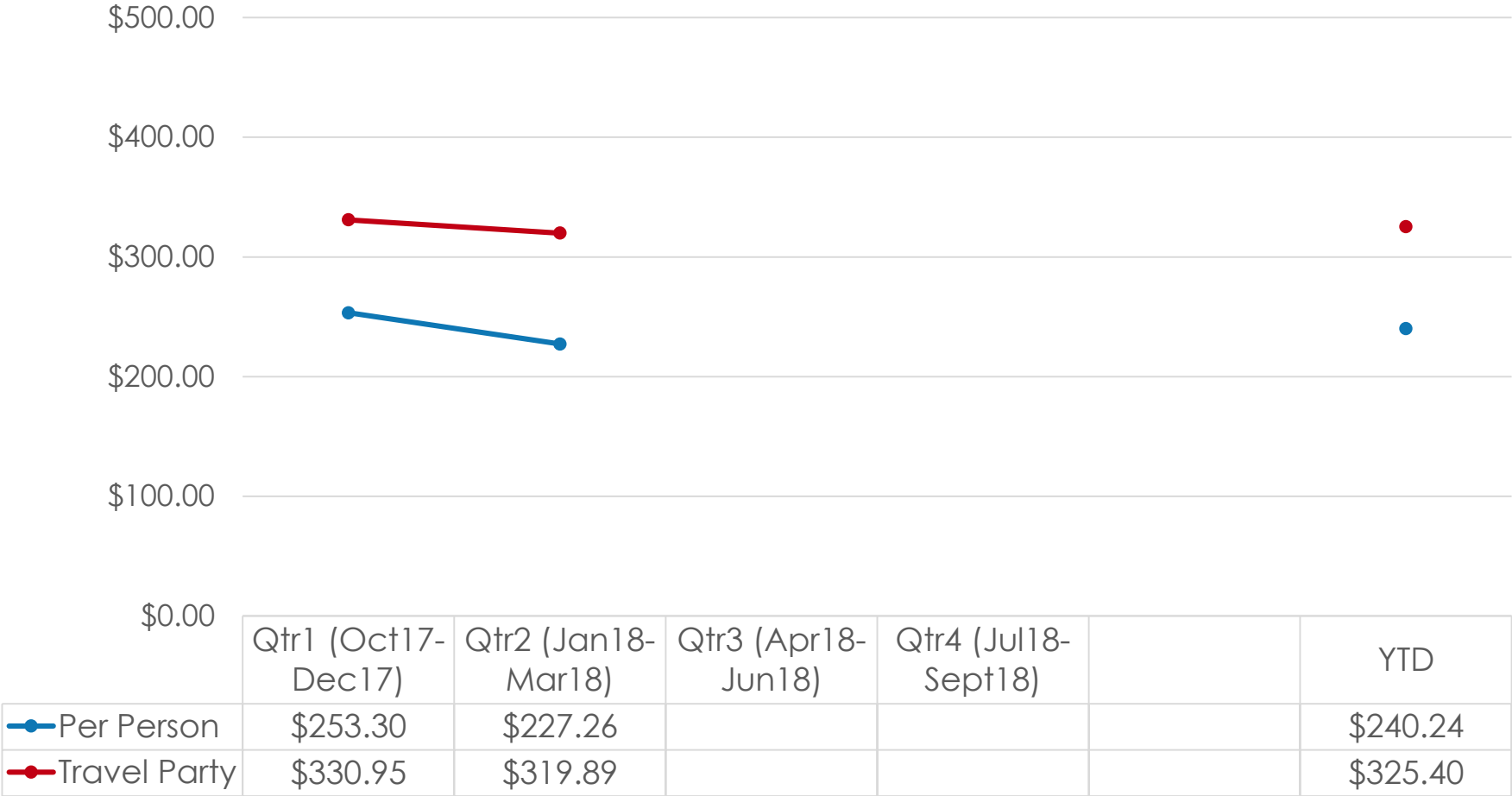
# Per Person MEAN expenditures – FY2018 Tracking

## On-Island/ Prepaid



# On-Island Per Day Spending – FY2018 Tracking

## MEAN



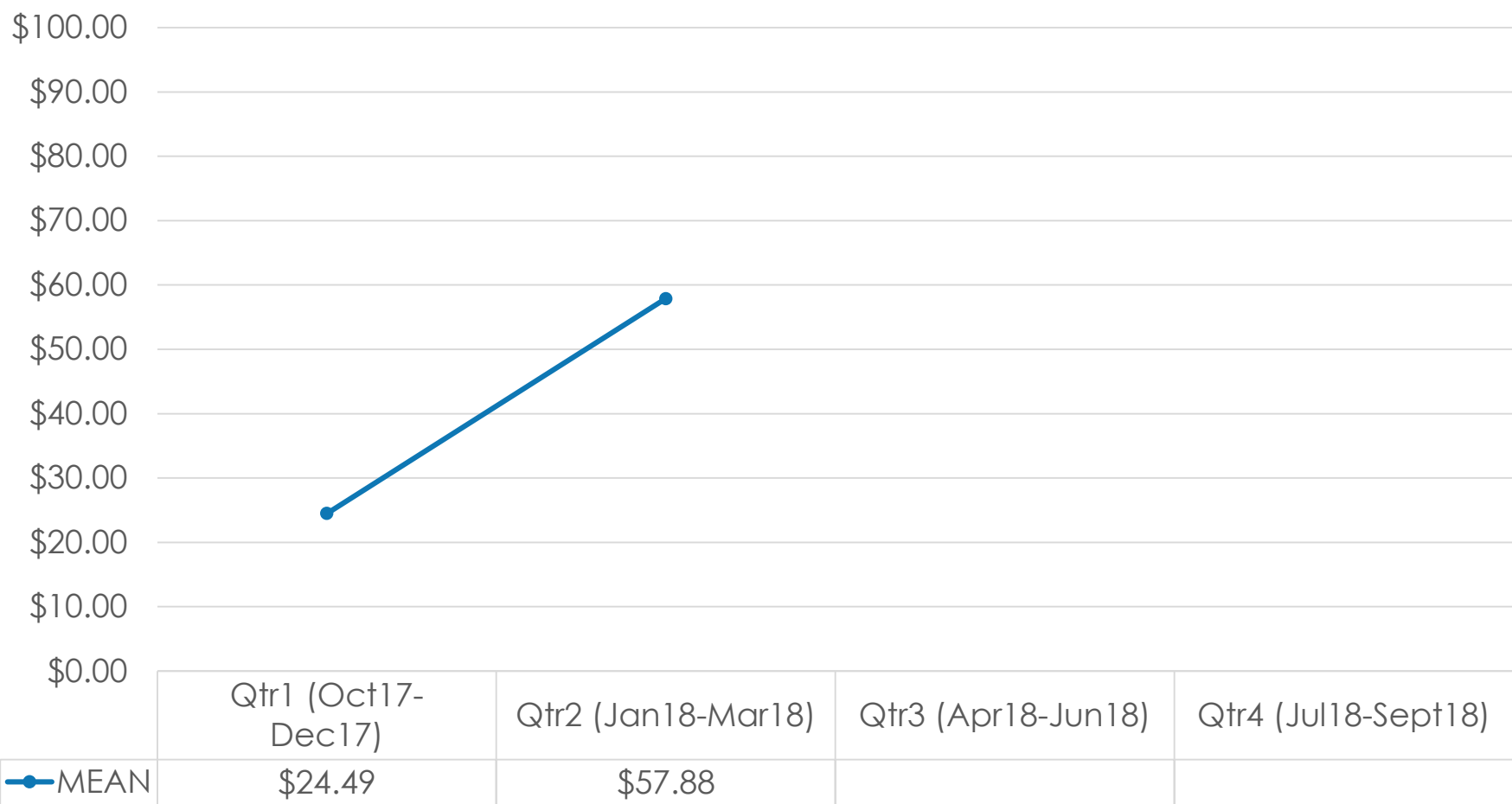
# On-Island Expenses by Category – MEAN Entire Travel Party





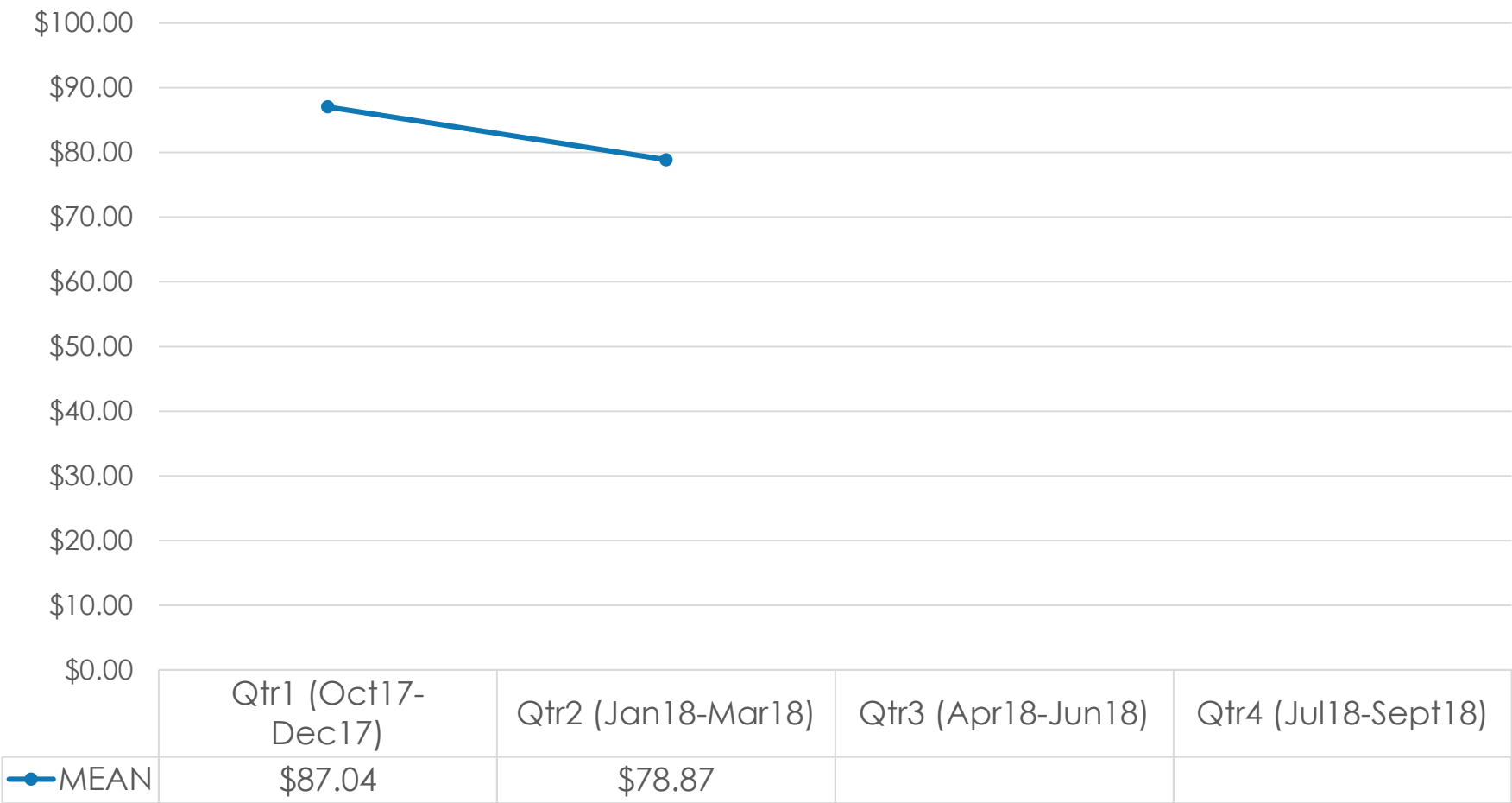
# On-Island – FY2018 Tracking

## Food & Beverage - Hotel



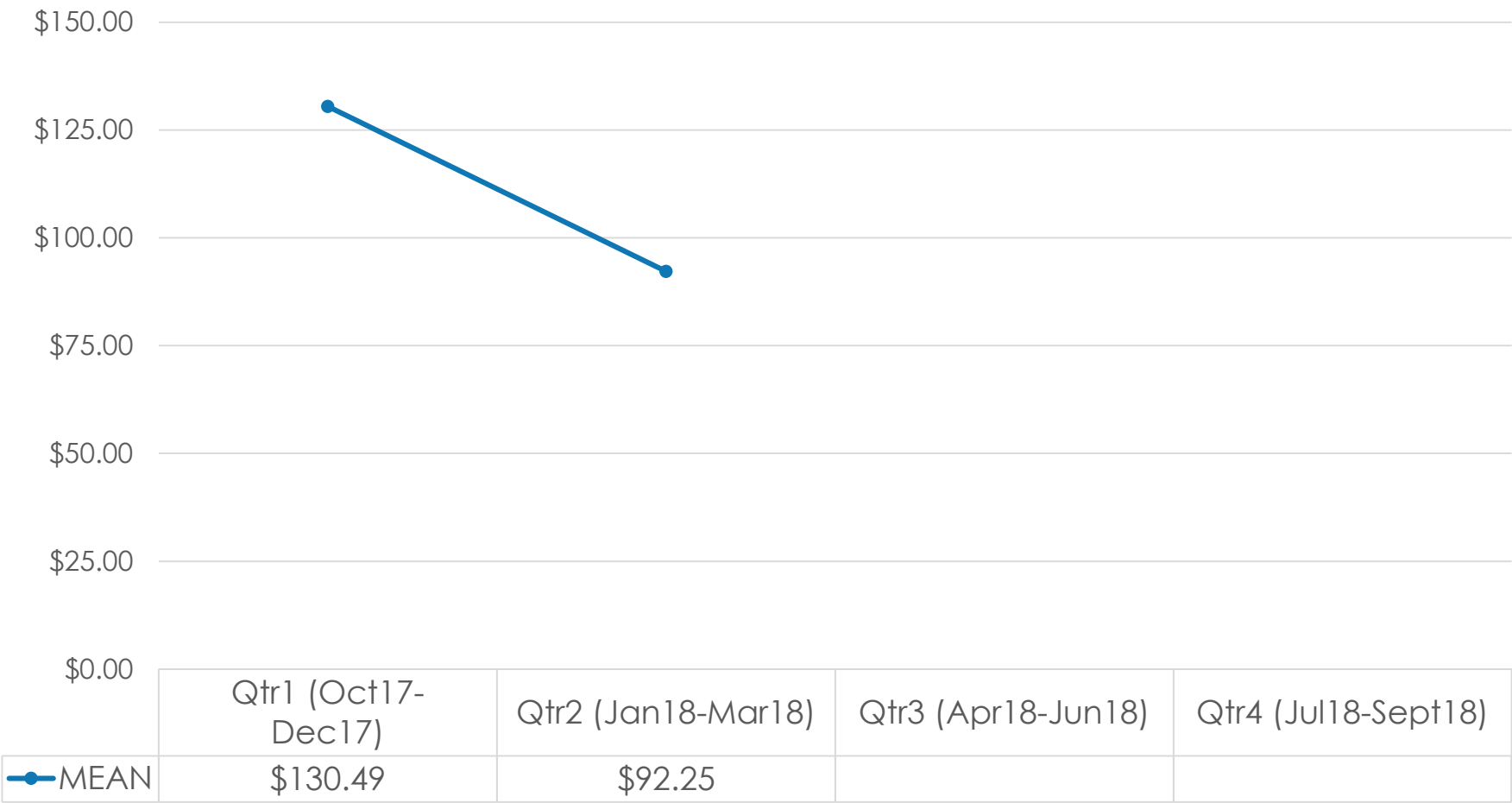
# On-Island – FY2018 Tracking

## Food & Beverage – Fast Food/ Convenience Store



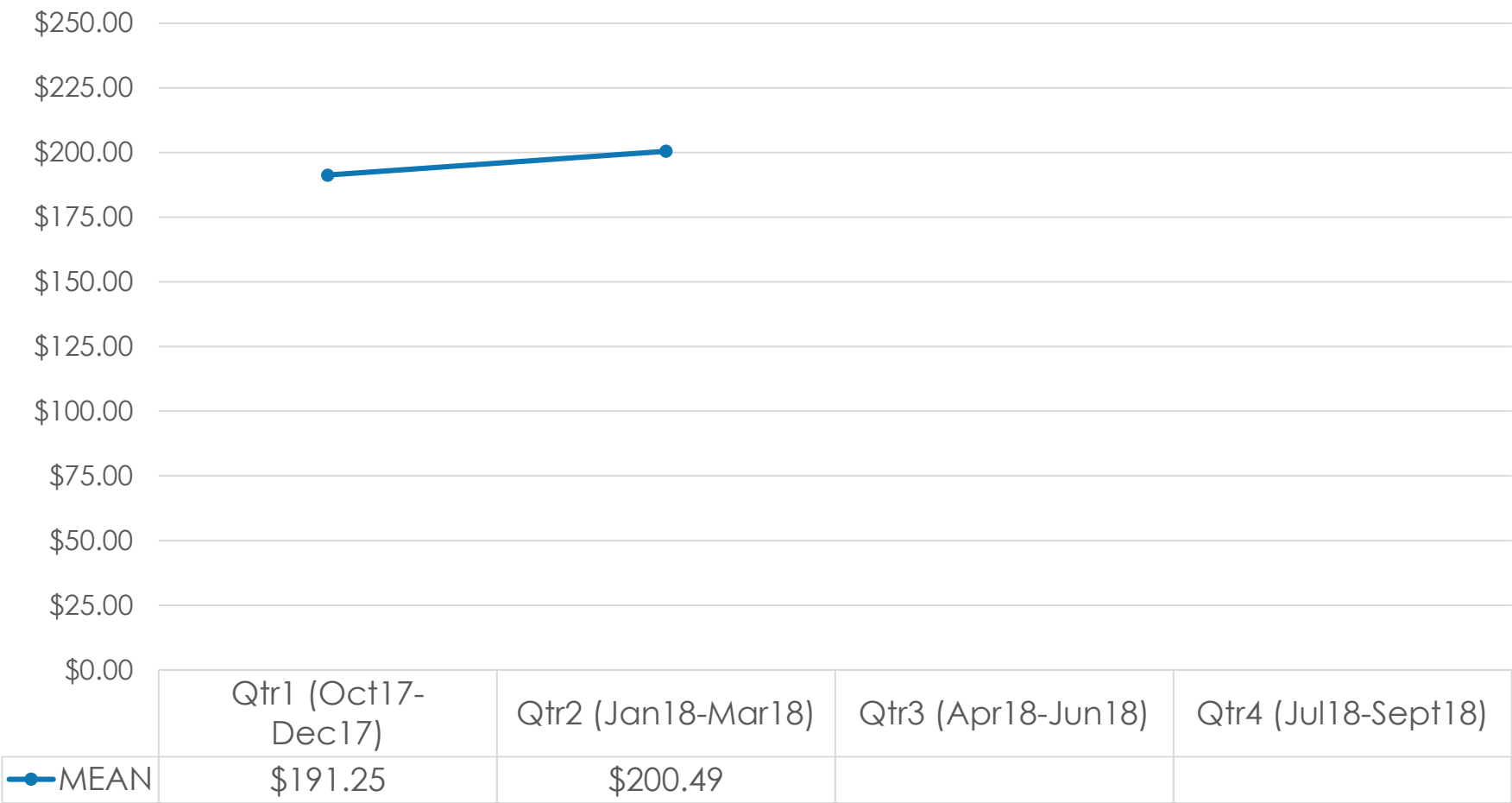
# On-Island – FY2018 Tracking

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



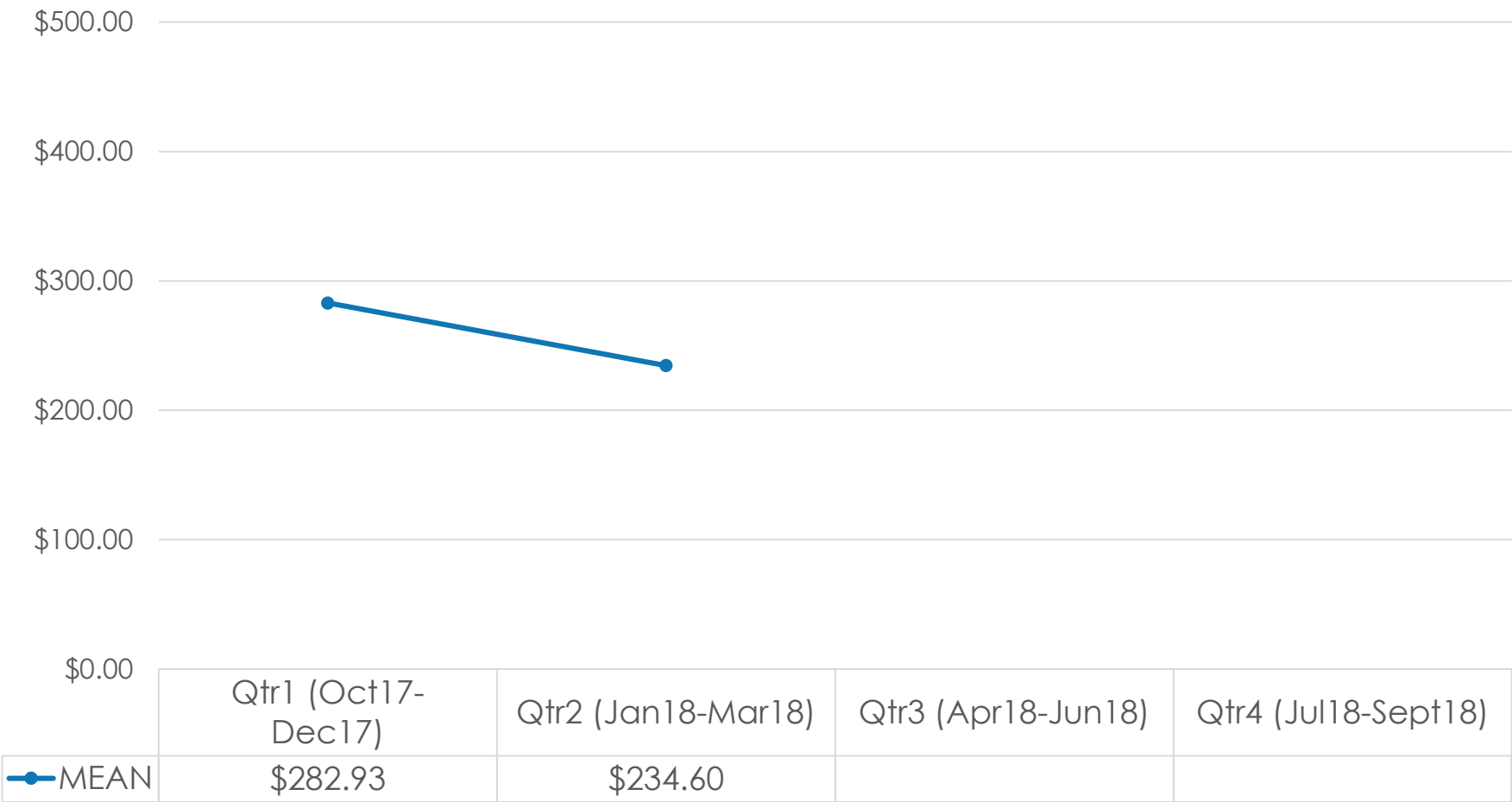
# On-Island – FY2018 Tracking

## Optional tour/ Activities



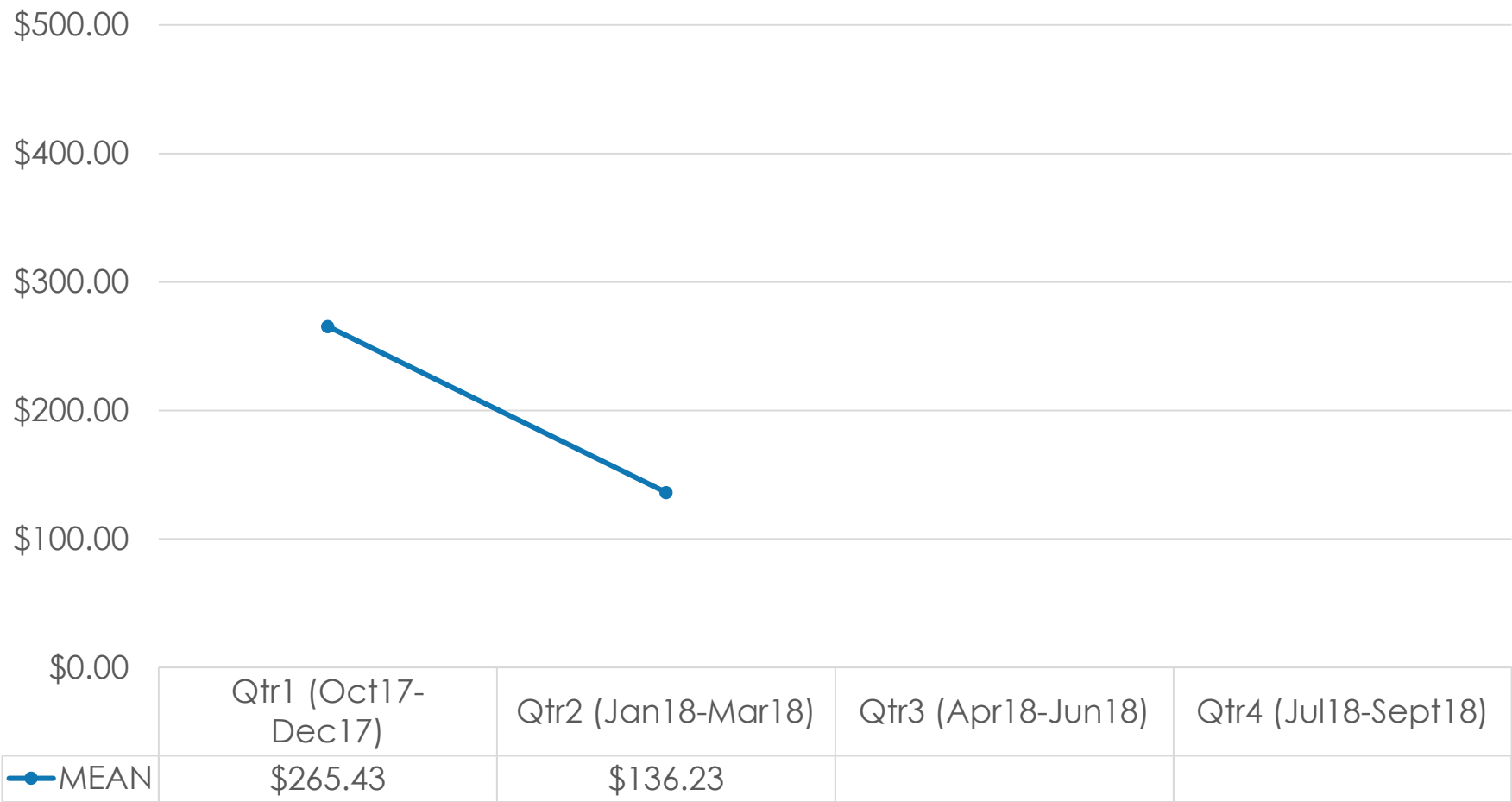
# On-Island – FY2018 Tracking

## Gift/ Souvenir – Self/ Companion



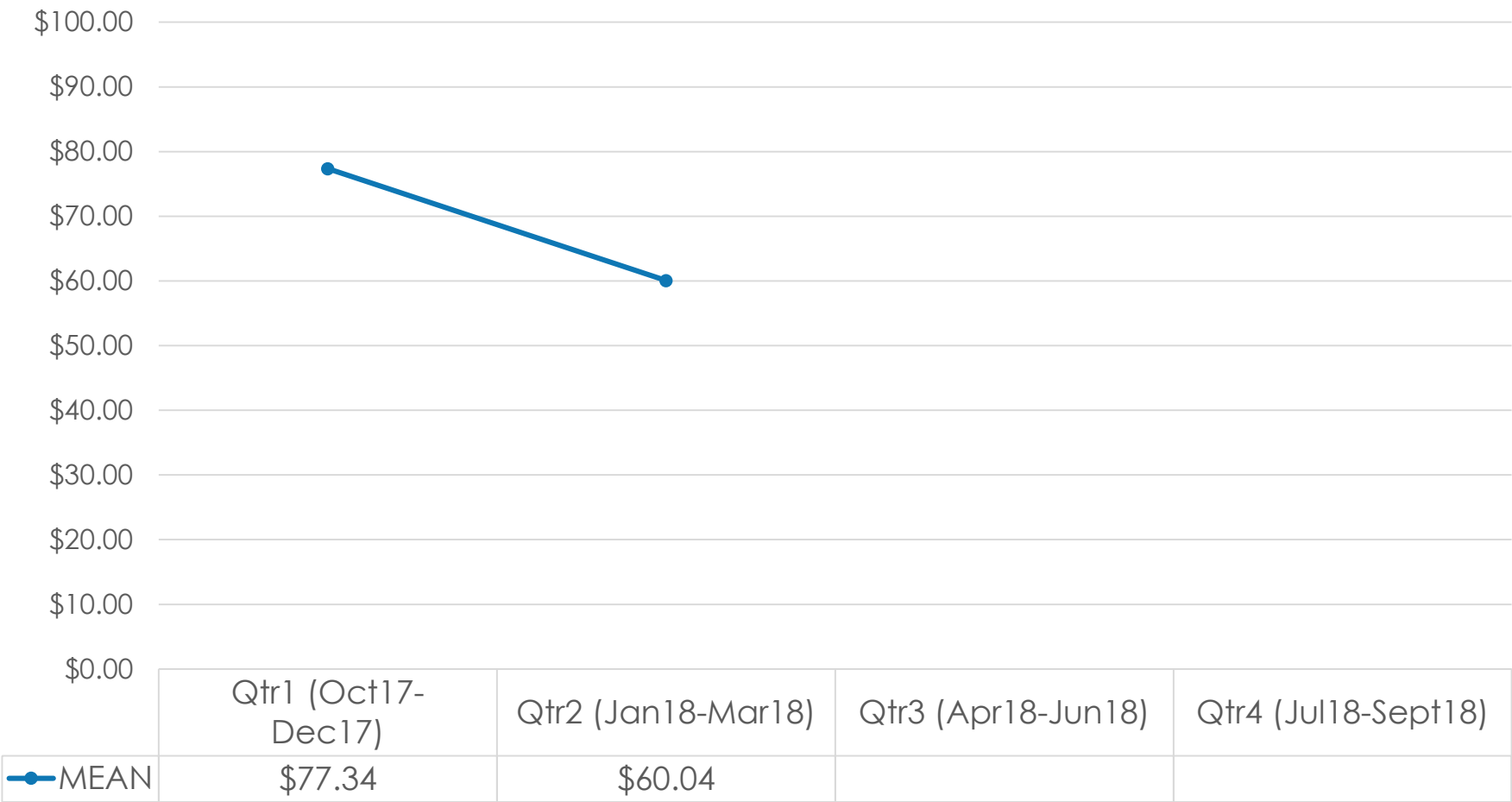
# On-Island – FY2018 Tracking

## Gift/ Souvenir – Friends/ Family



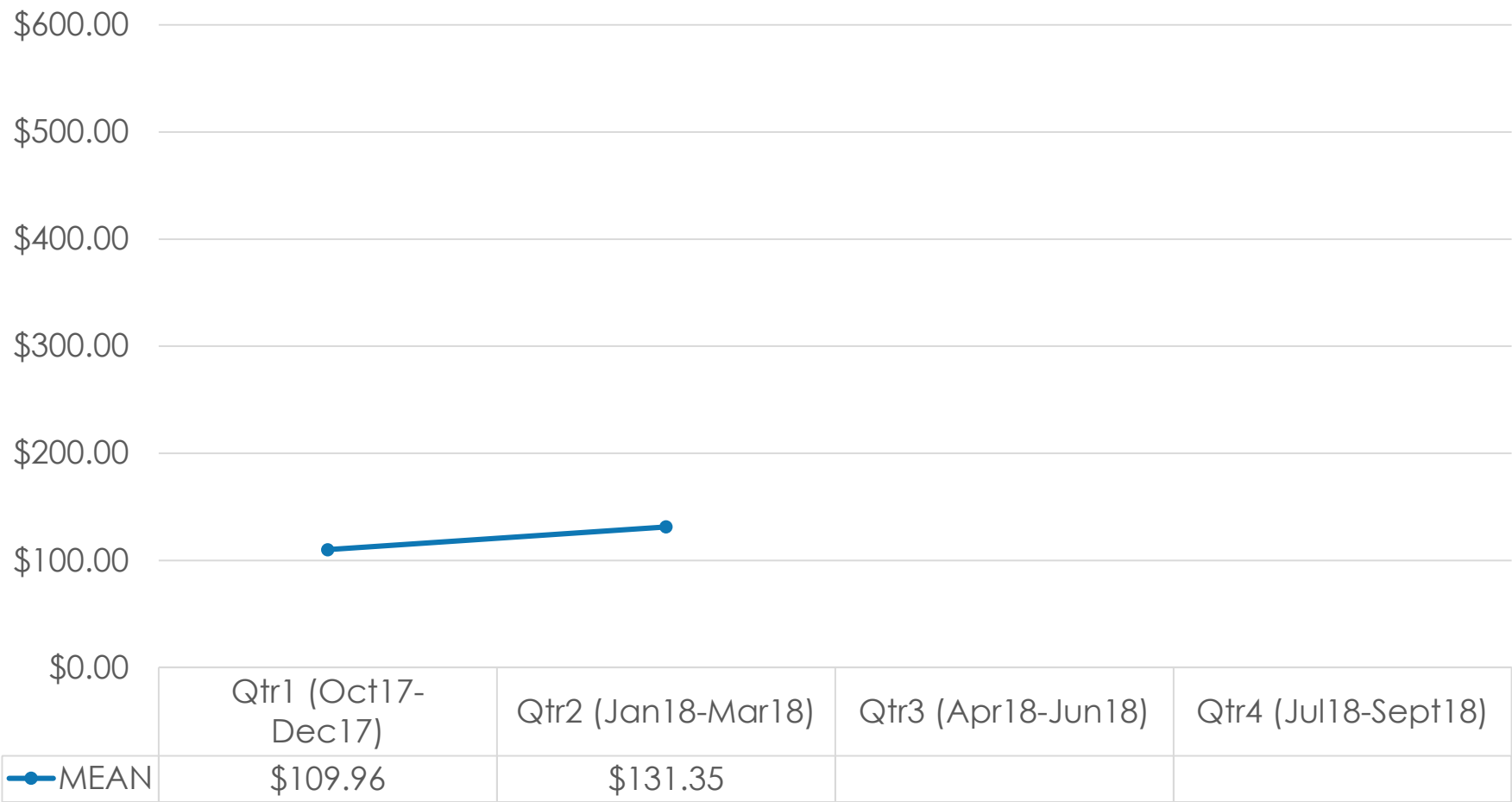
# On-Island – FY2018 Tracking

## Local Transportation



# On-Island – FY2018 Tracking

## Other Not Included

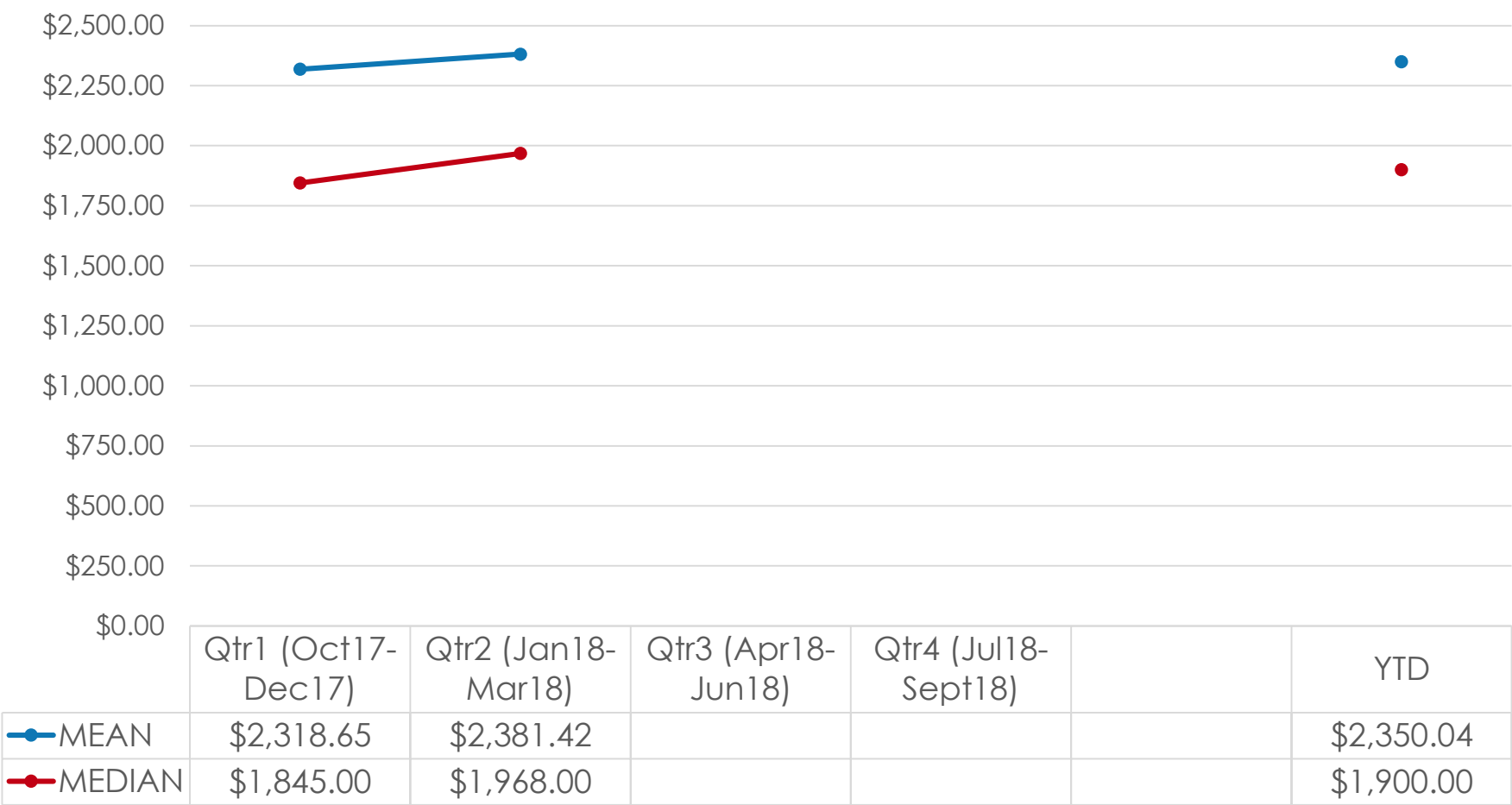




# TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$2,381.42 = overall mean average prepaid & on-isle expense by respondent

# TOTAL Per Person Expenditures – FY2018 Tracking



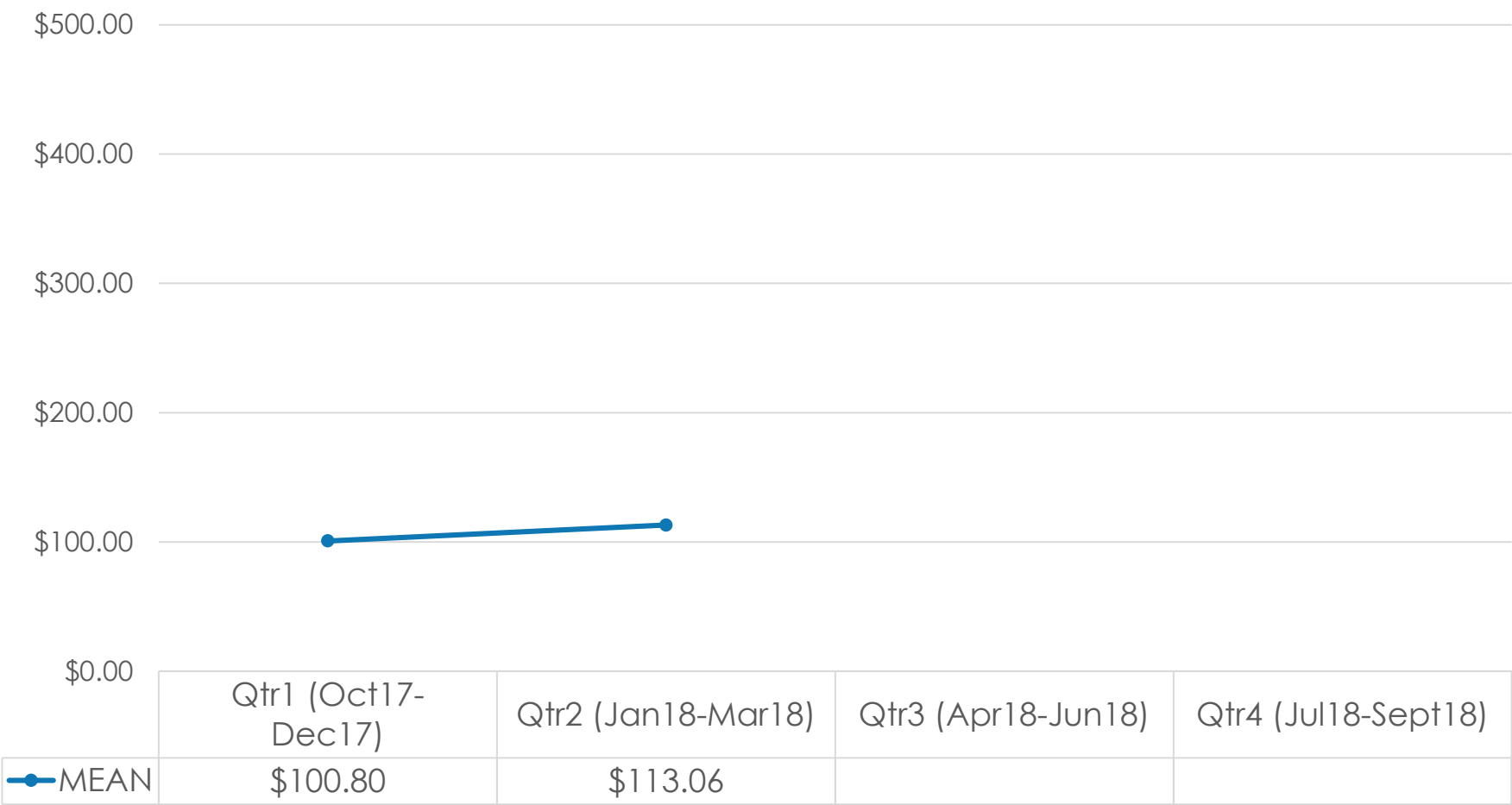
# TOTAL Per Person Expenditures – Key Segments

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

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOON
		-	-	-	-	-
TOTAL PP	Mean	\$2,381.42	\$3,795.23	\$2,663.48	\$2,445.18	\$1,997.04
	Median	\$1,968	\$2,487	\$2,102	\$2,407	\$2,097

Prepared by Anthology Research

# GUAM AIRPORT EXPENDITURE – FY2018 Tracking

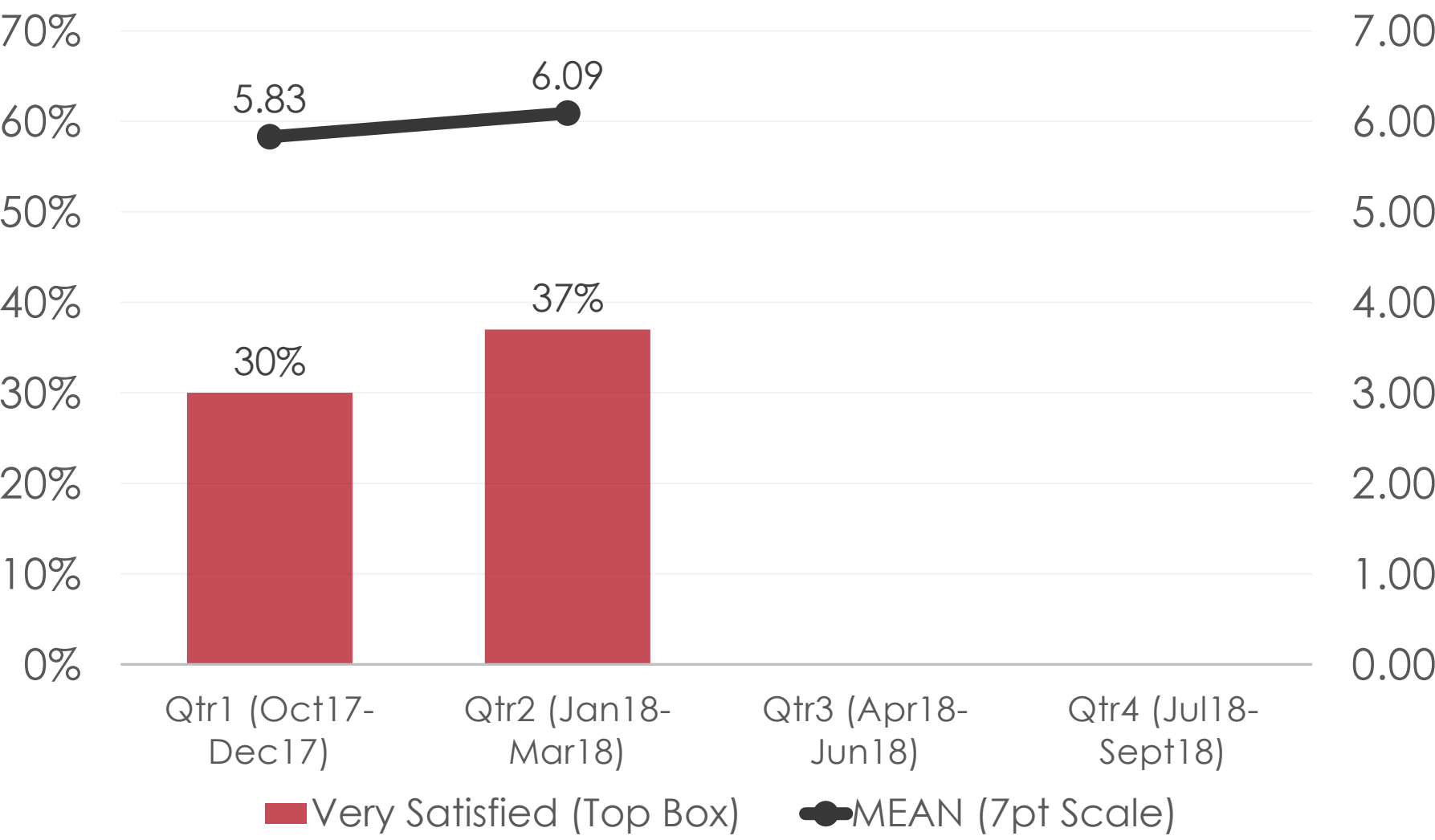


# SECTION 4

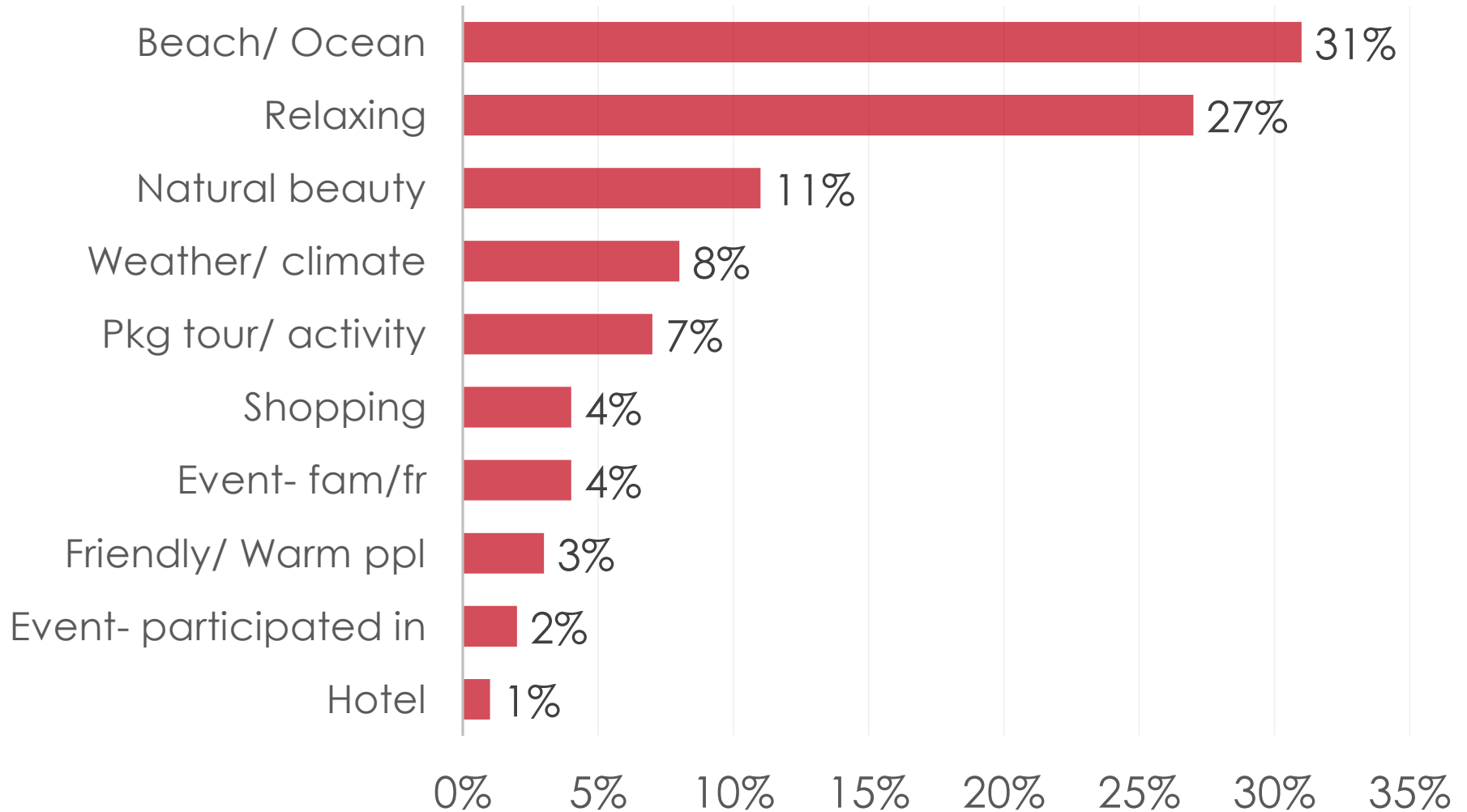
## VISITOR SATISFACTION

### BEHAVIOR

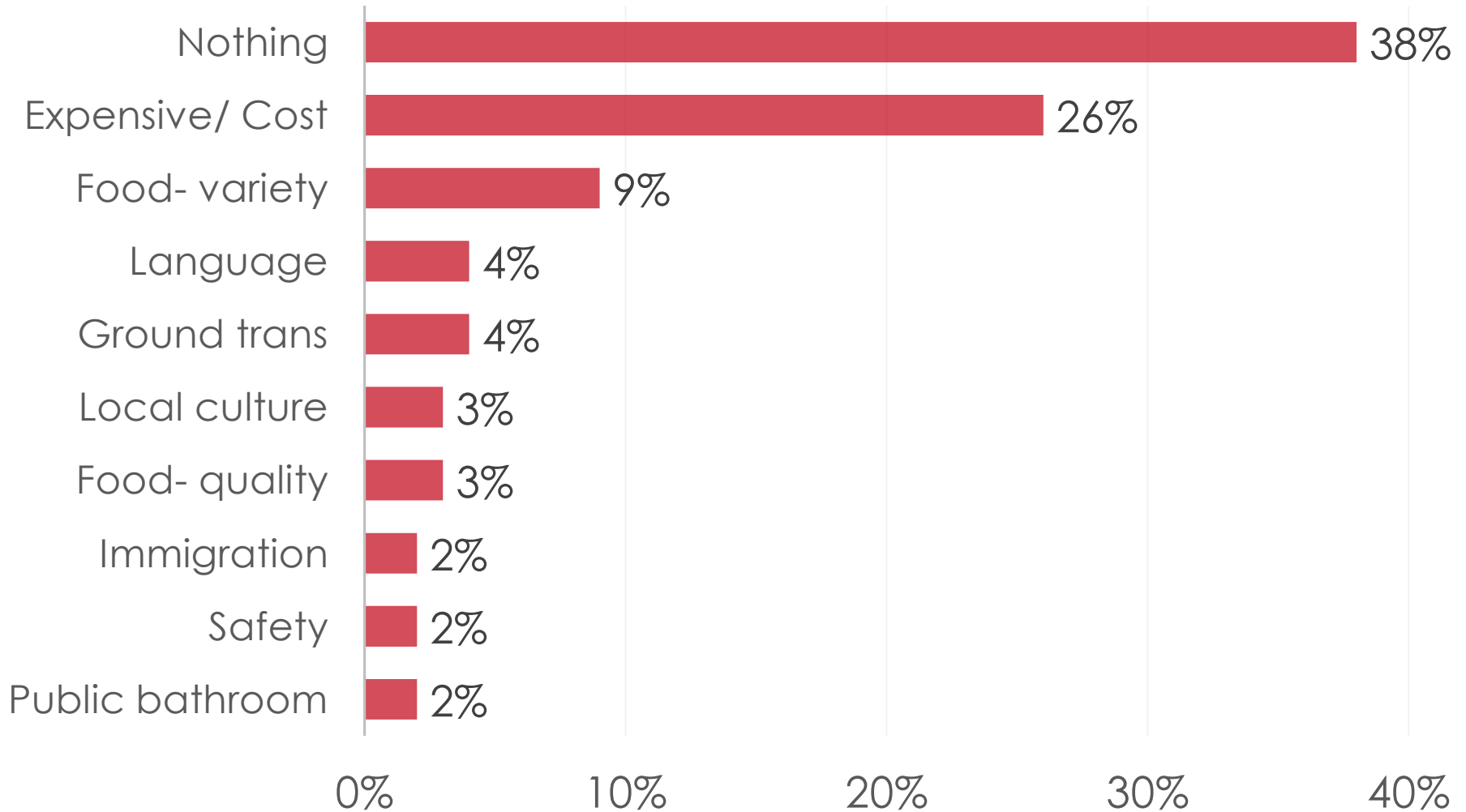
# OVERALL SATISFACTION



# Positive Aspect of Trip

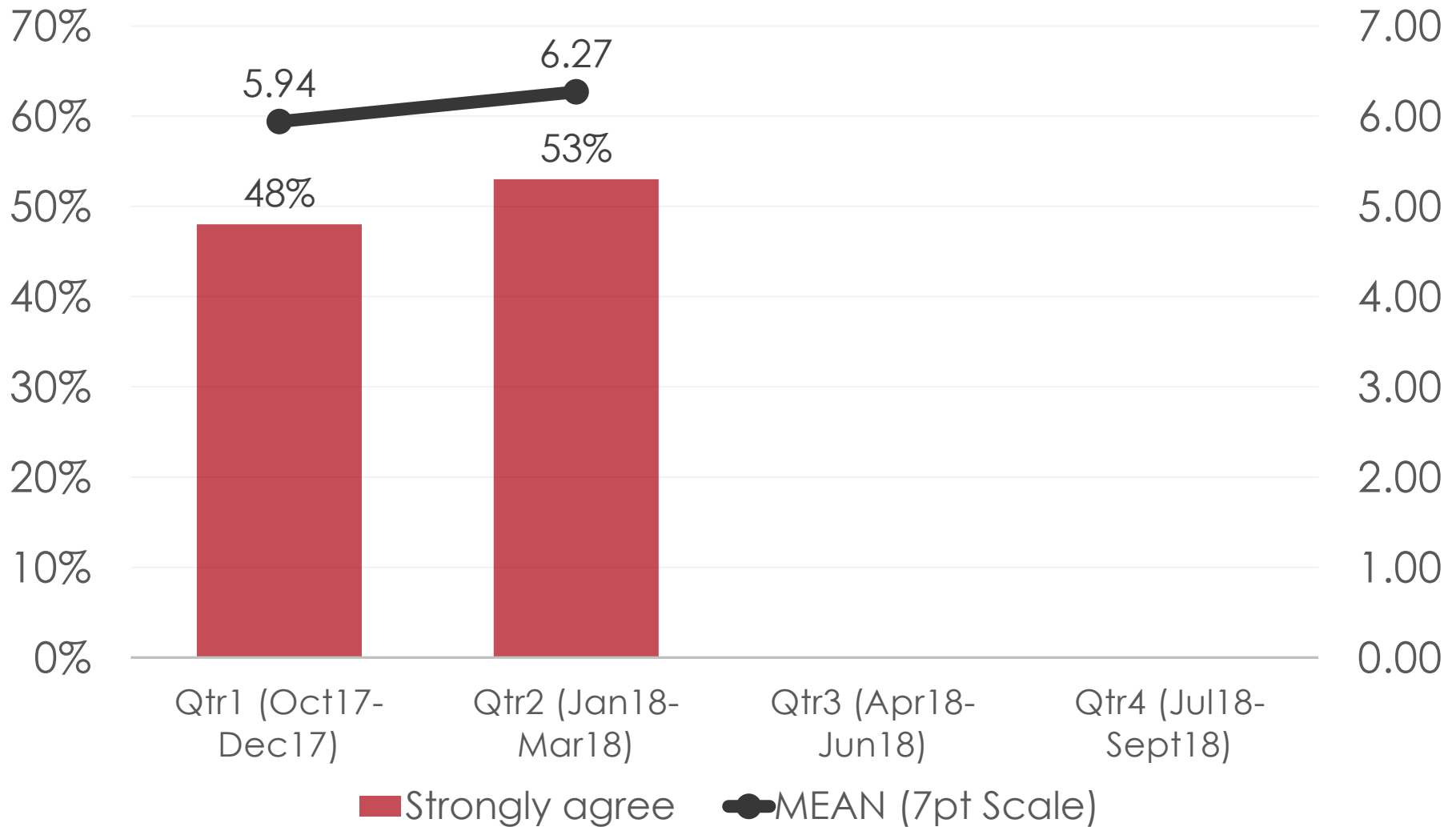


# Negative Aspect of Trip

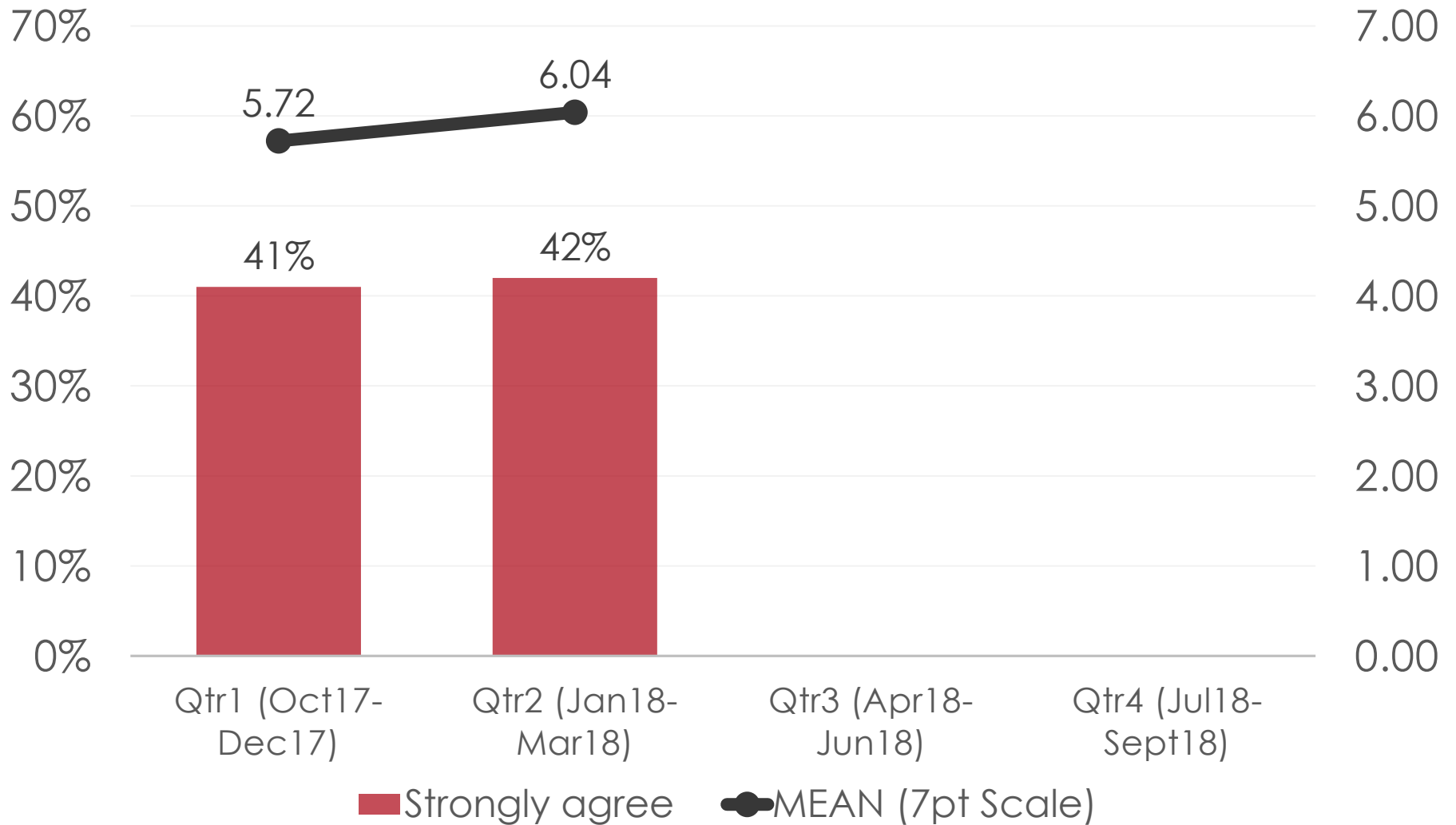




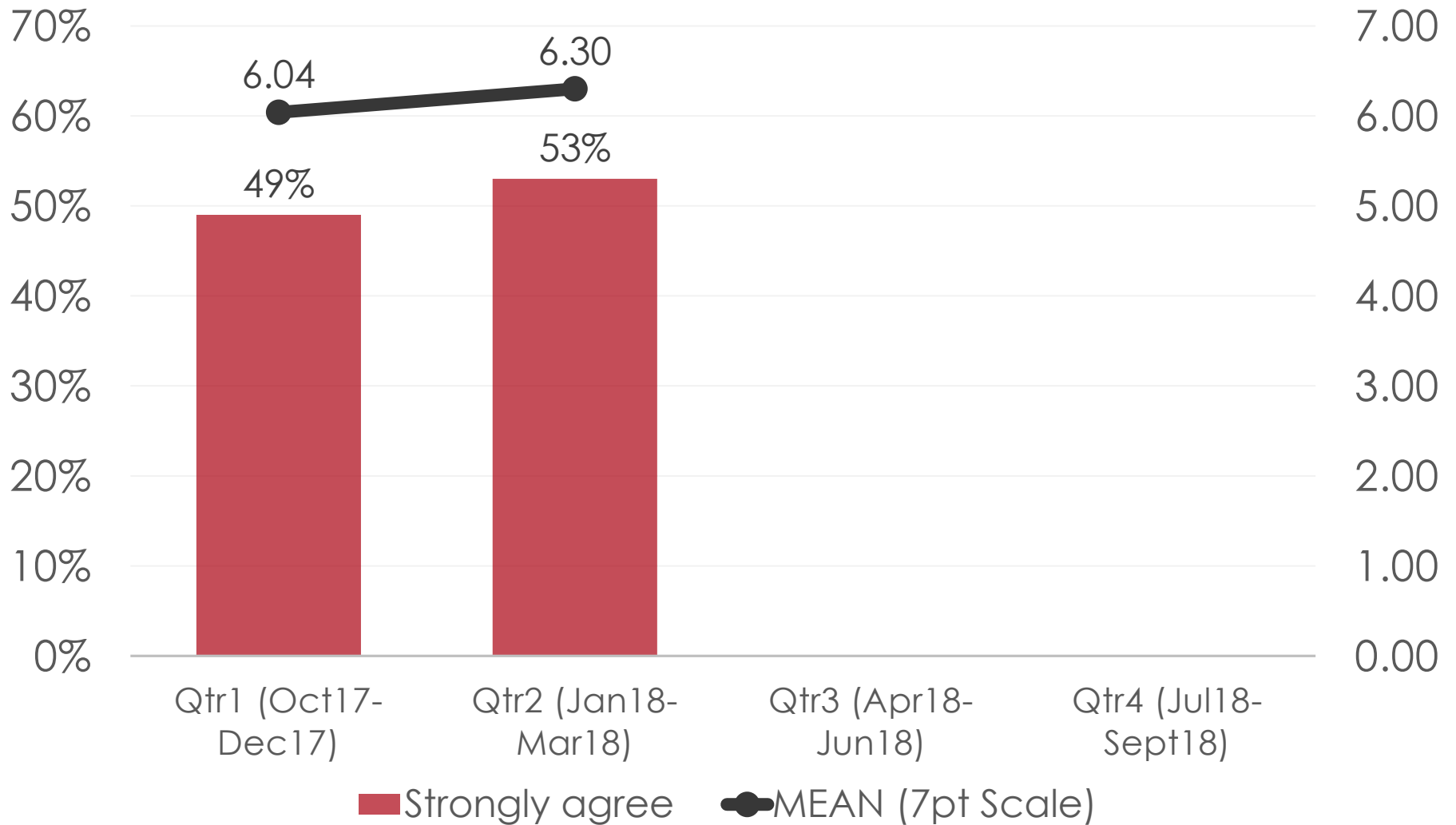
# Guam was better than expected



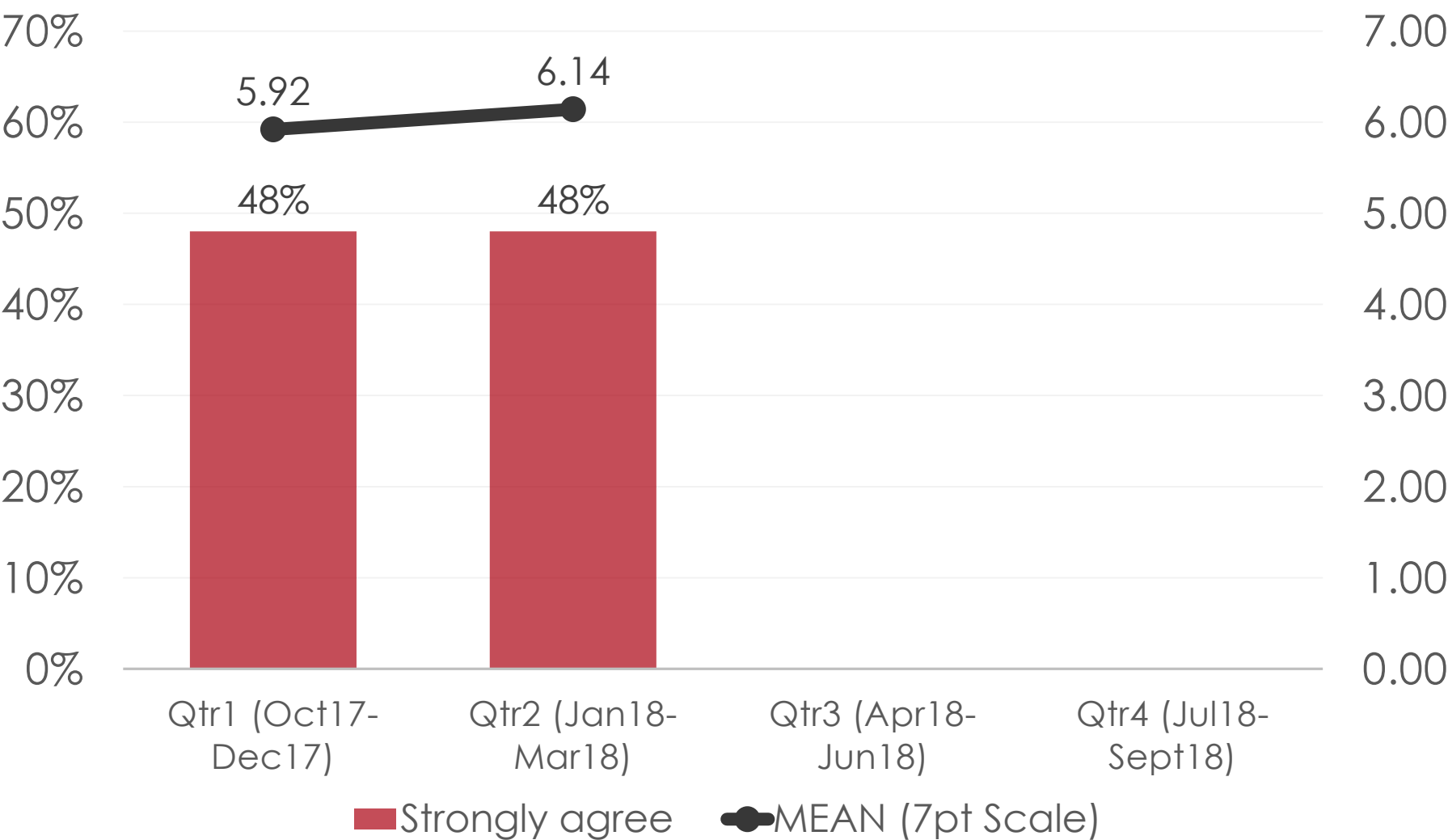
# I had no communication problems



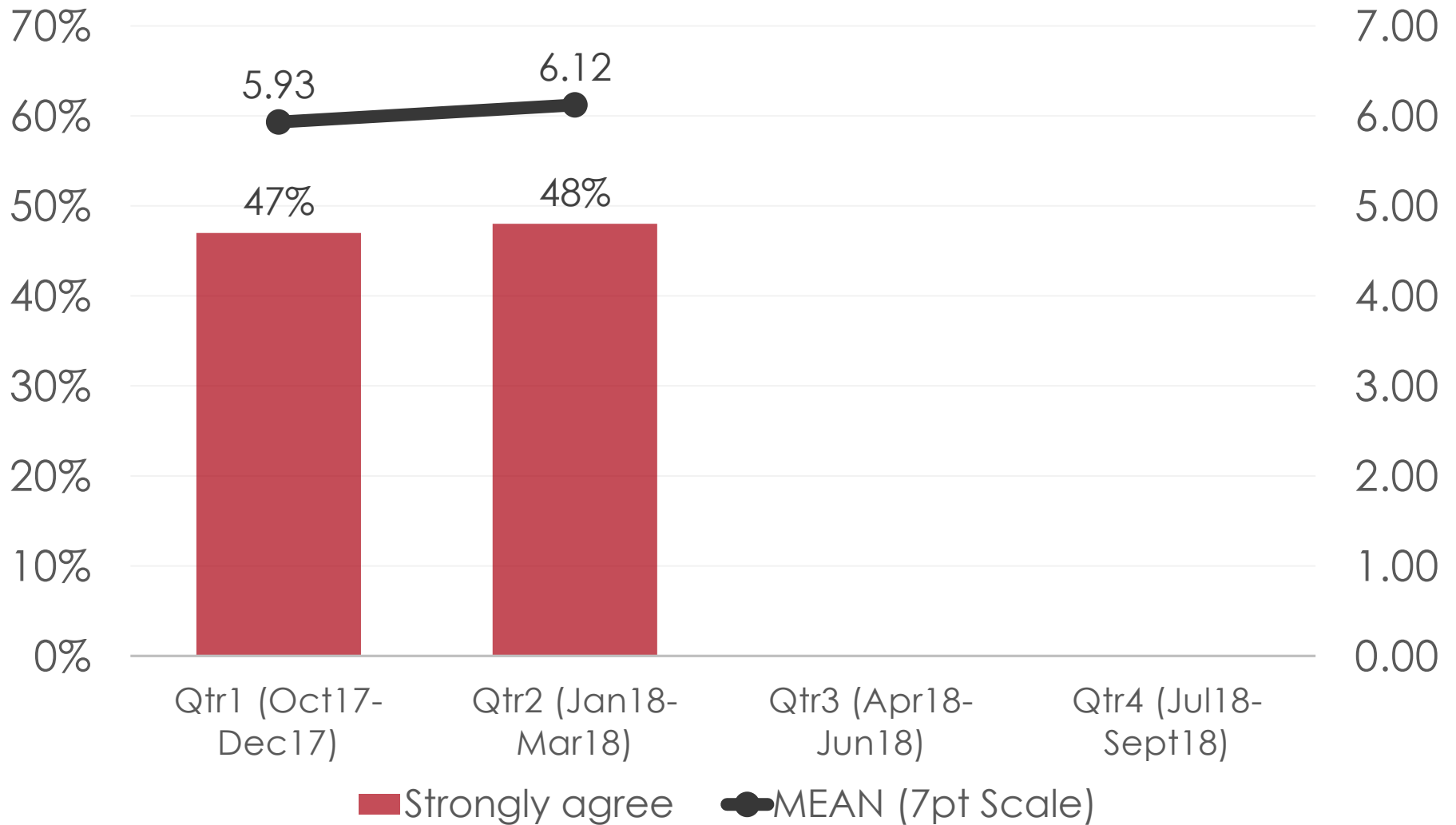
# I will recommend Guam to friends



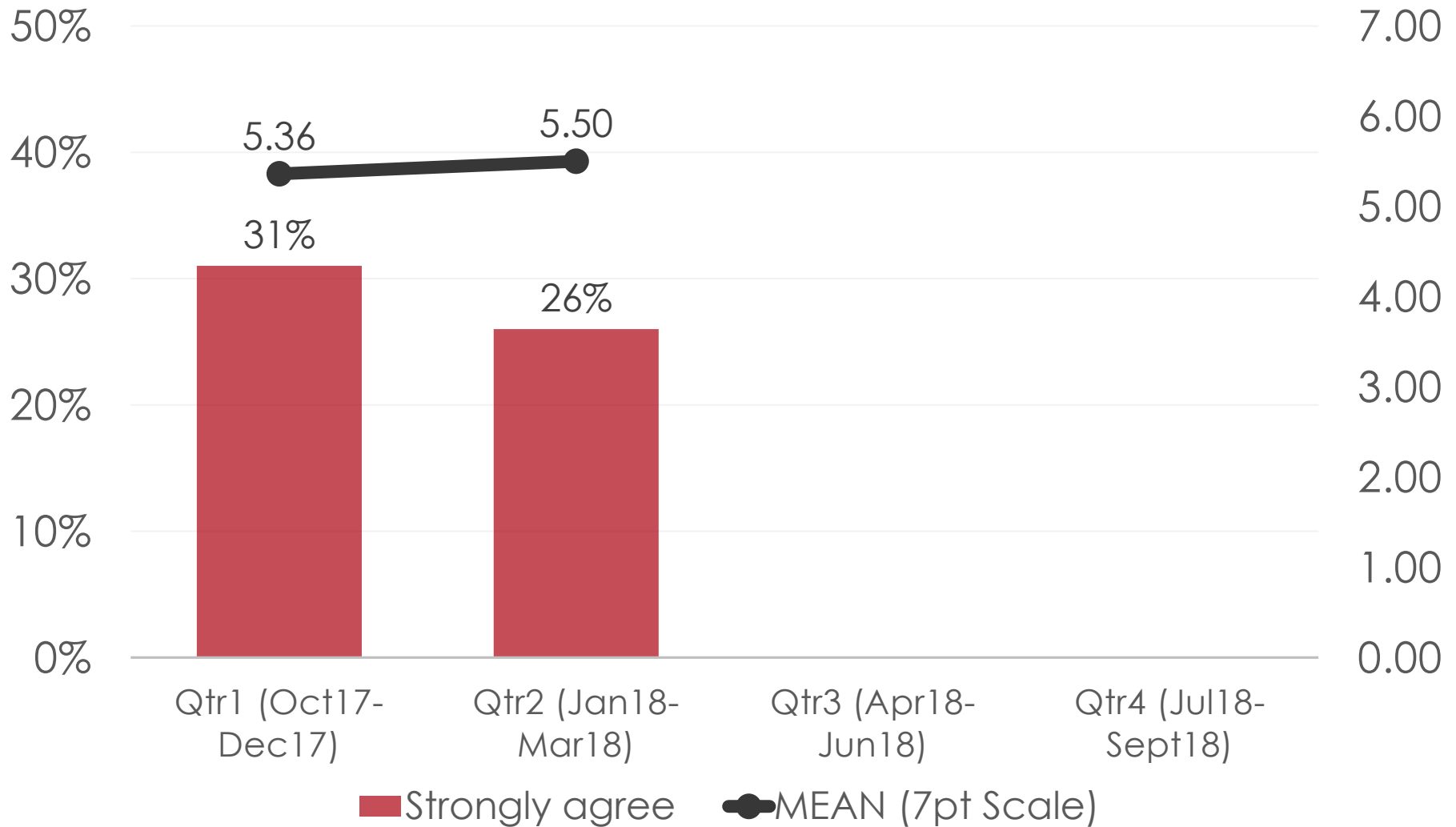
# Sites on Guam were attractive



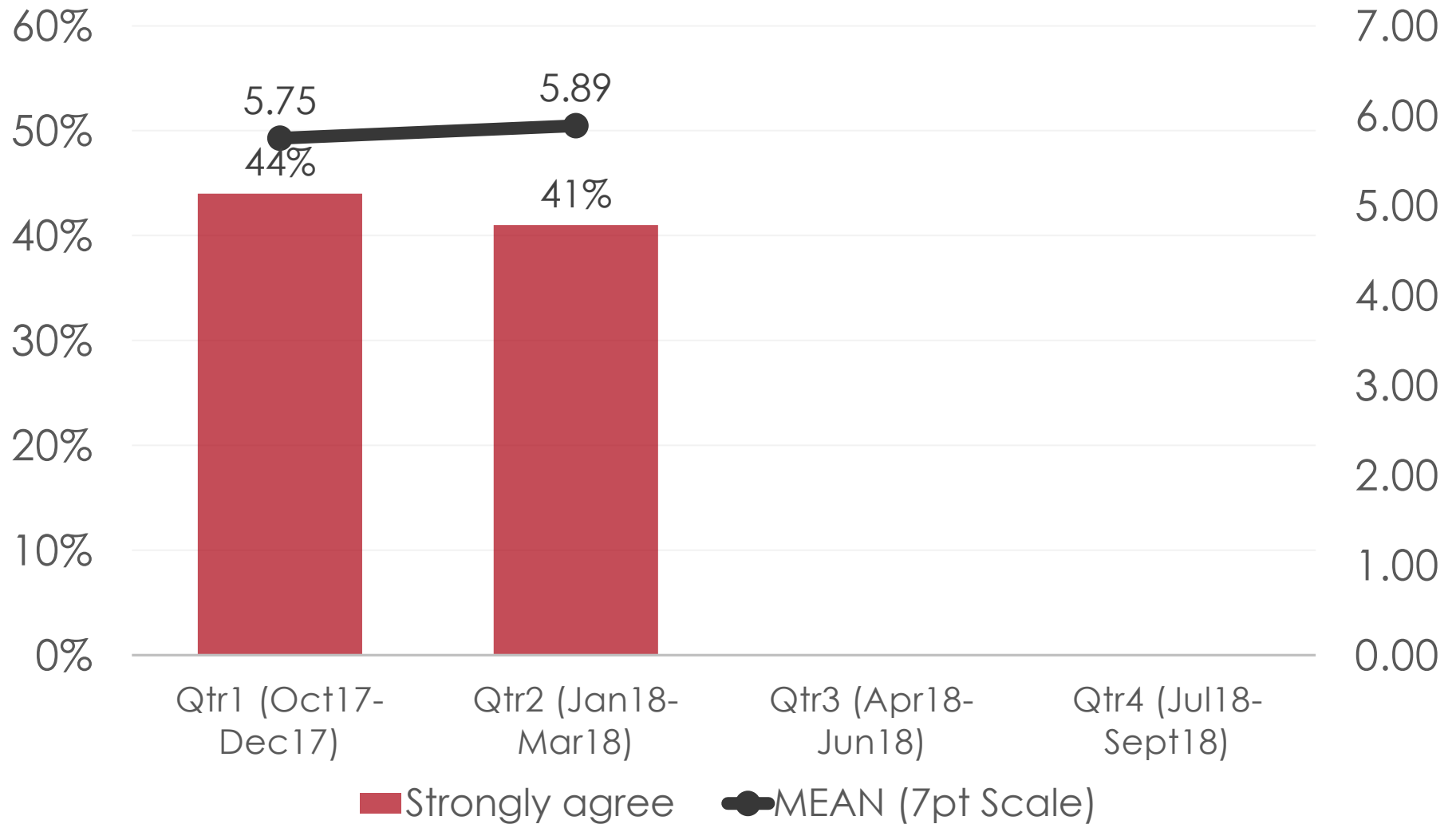
# I plan to visit Guam again



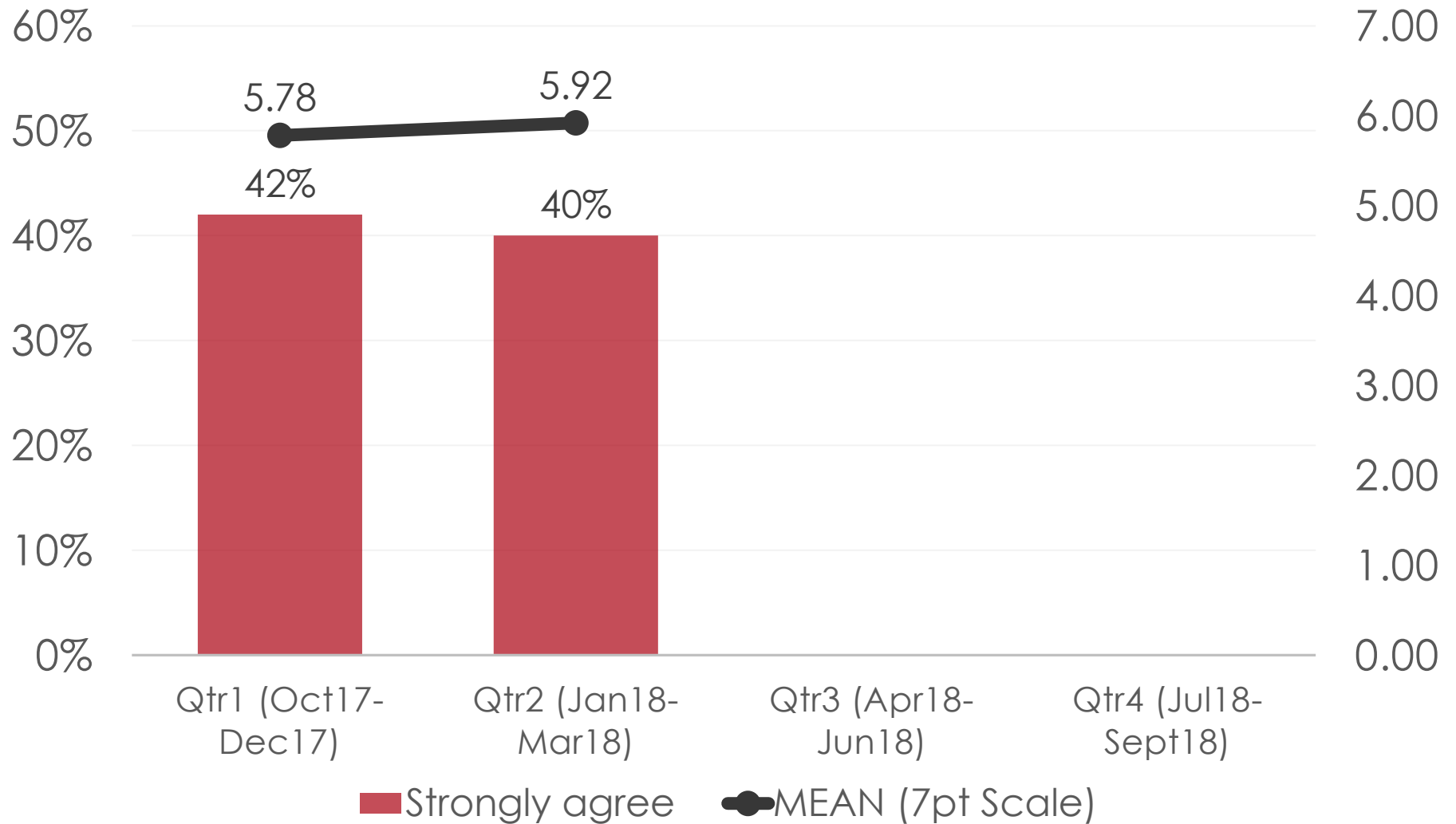
# Not enough night time activities



# Tour guides were professional

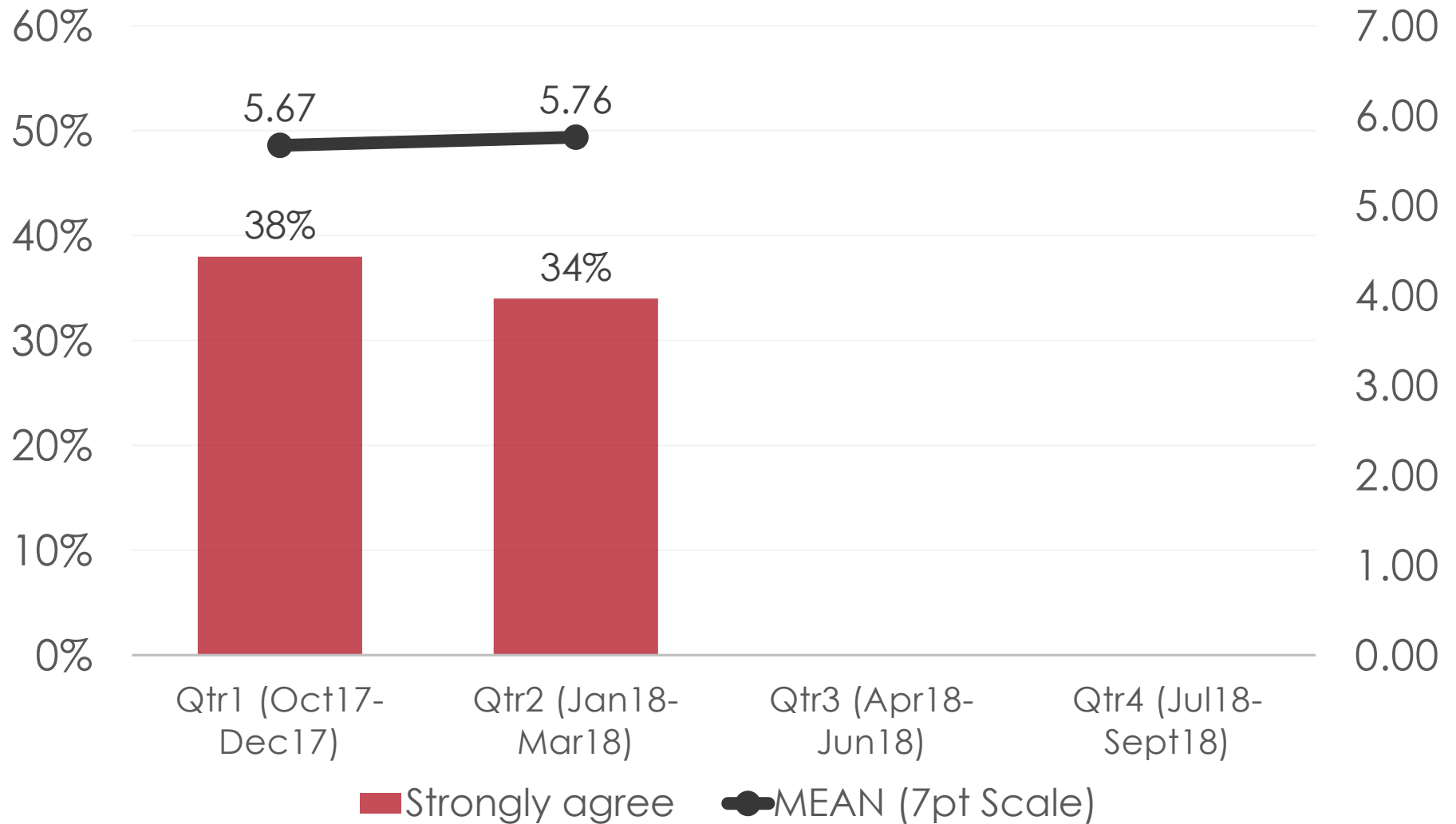


# Tour drivers were professional

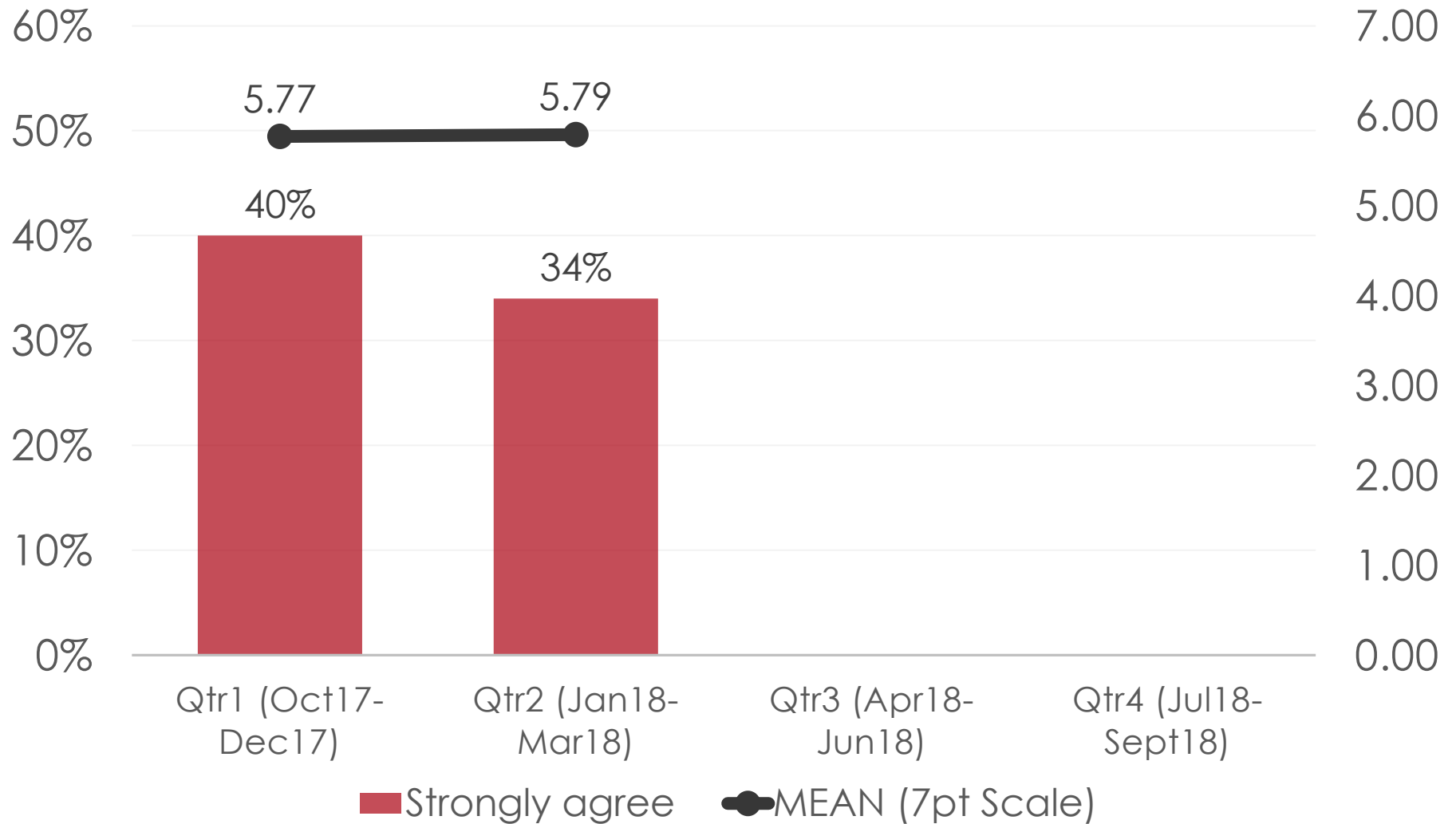




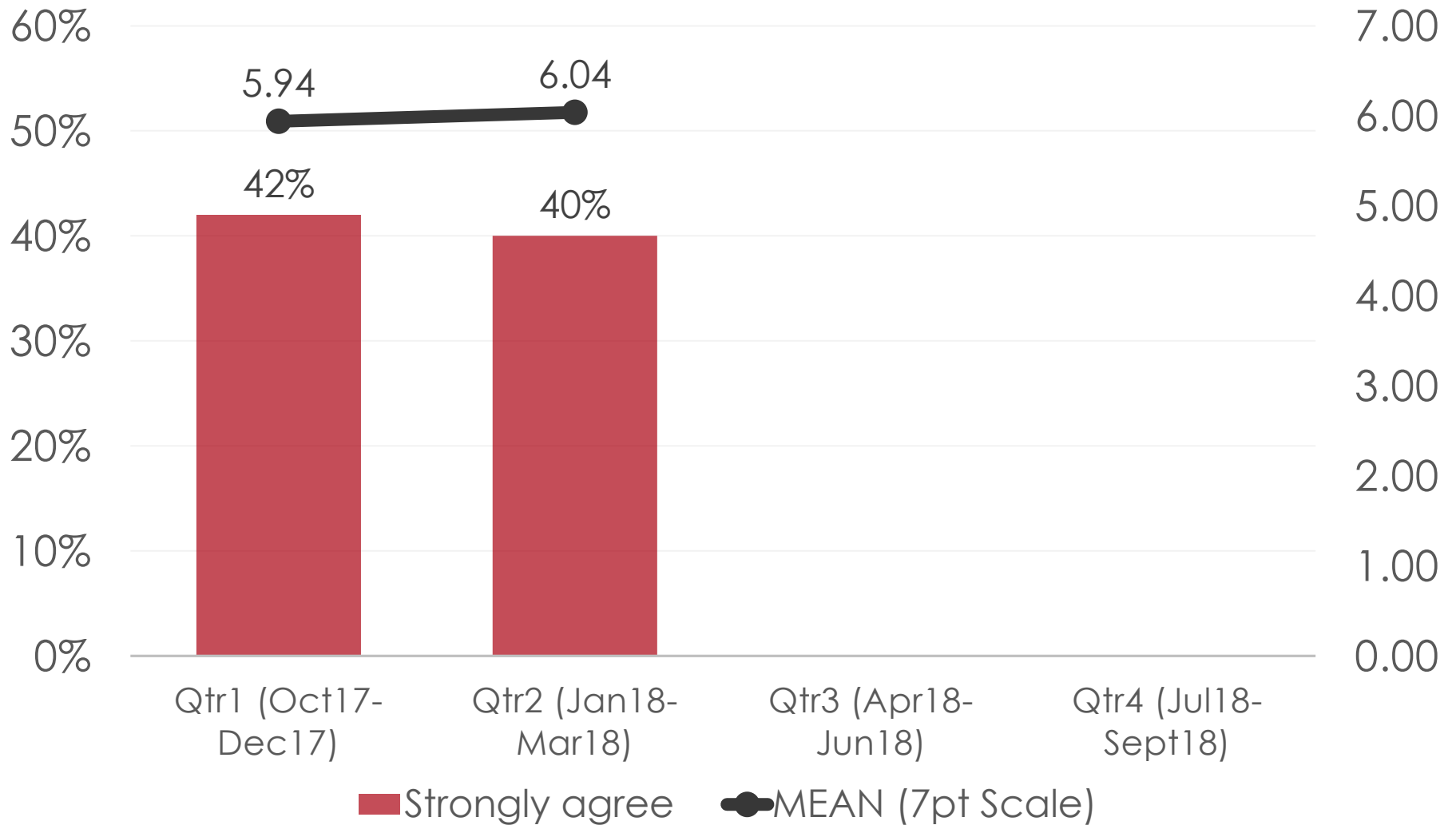
# Taxi drivers were professional



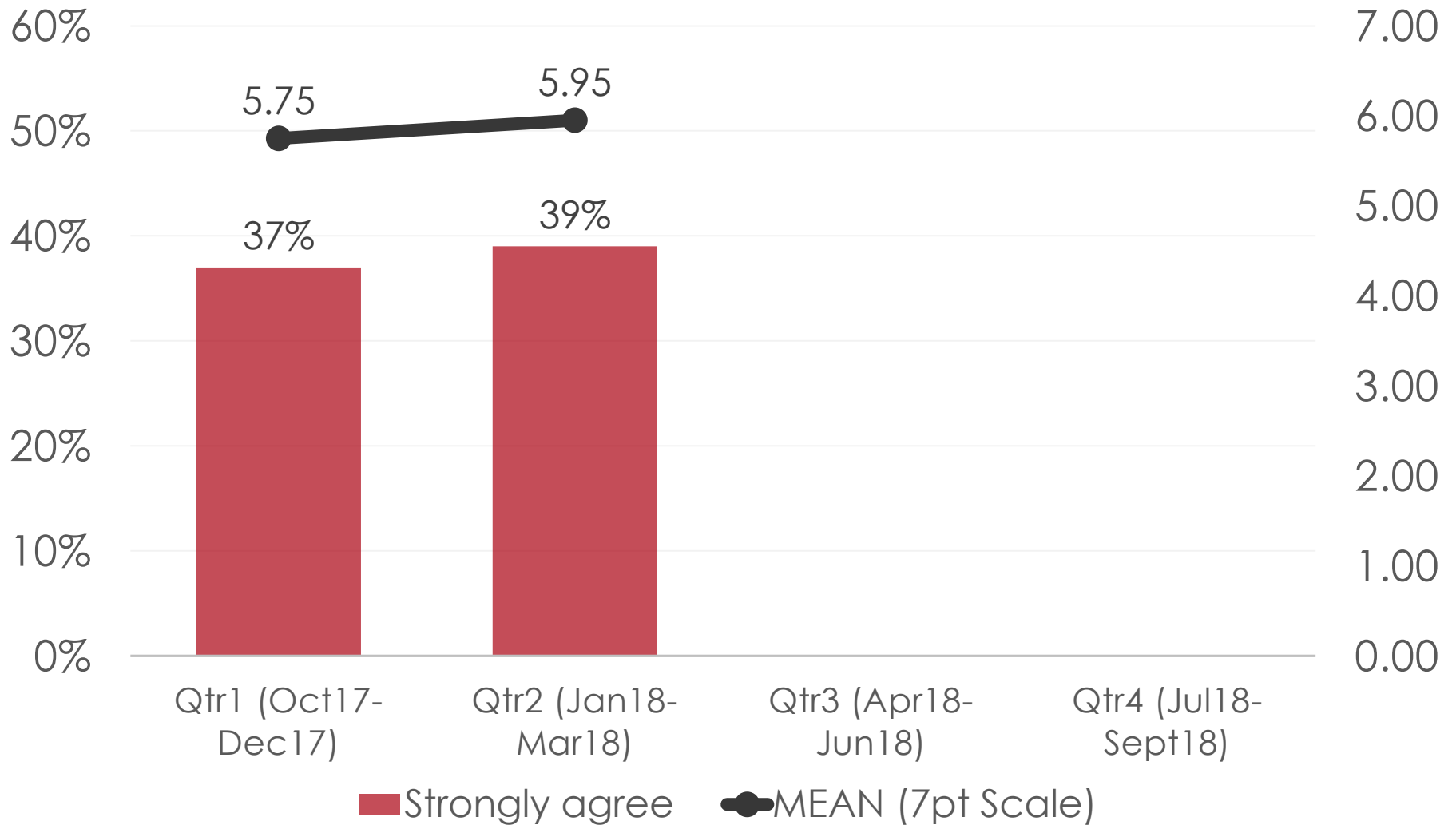
# Taxis were clean



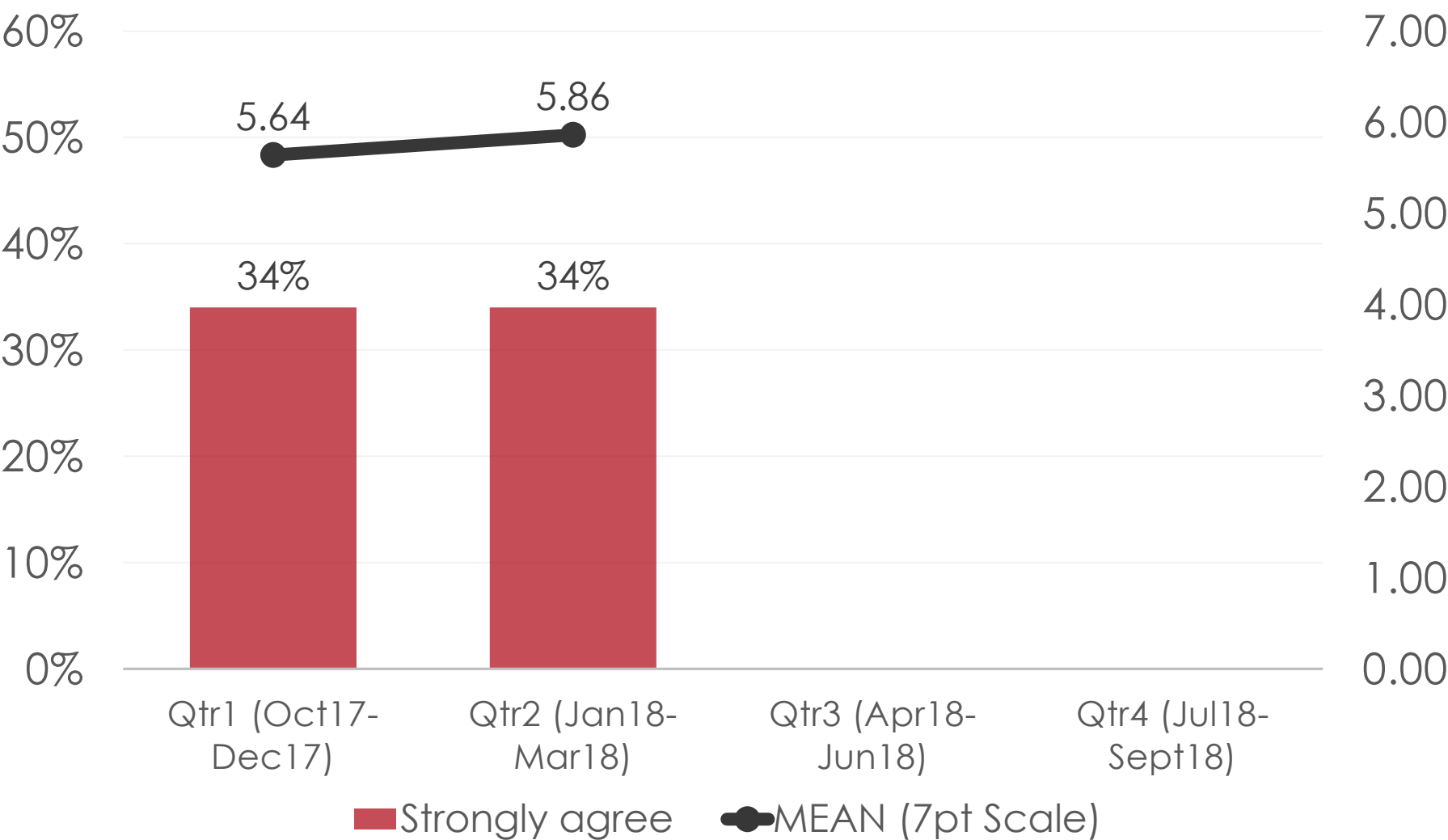
# Guam airport was clean



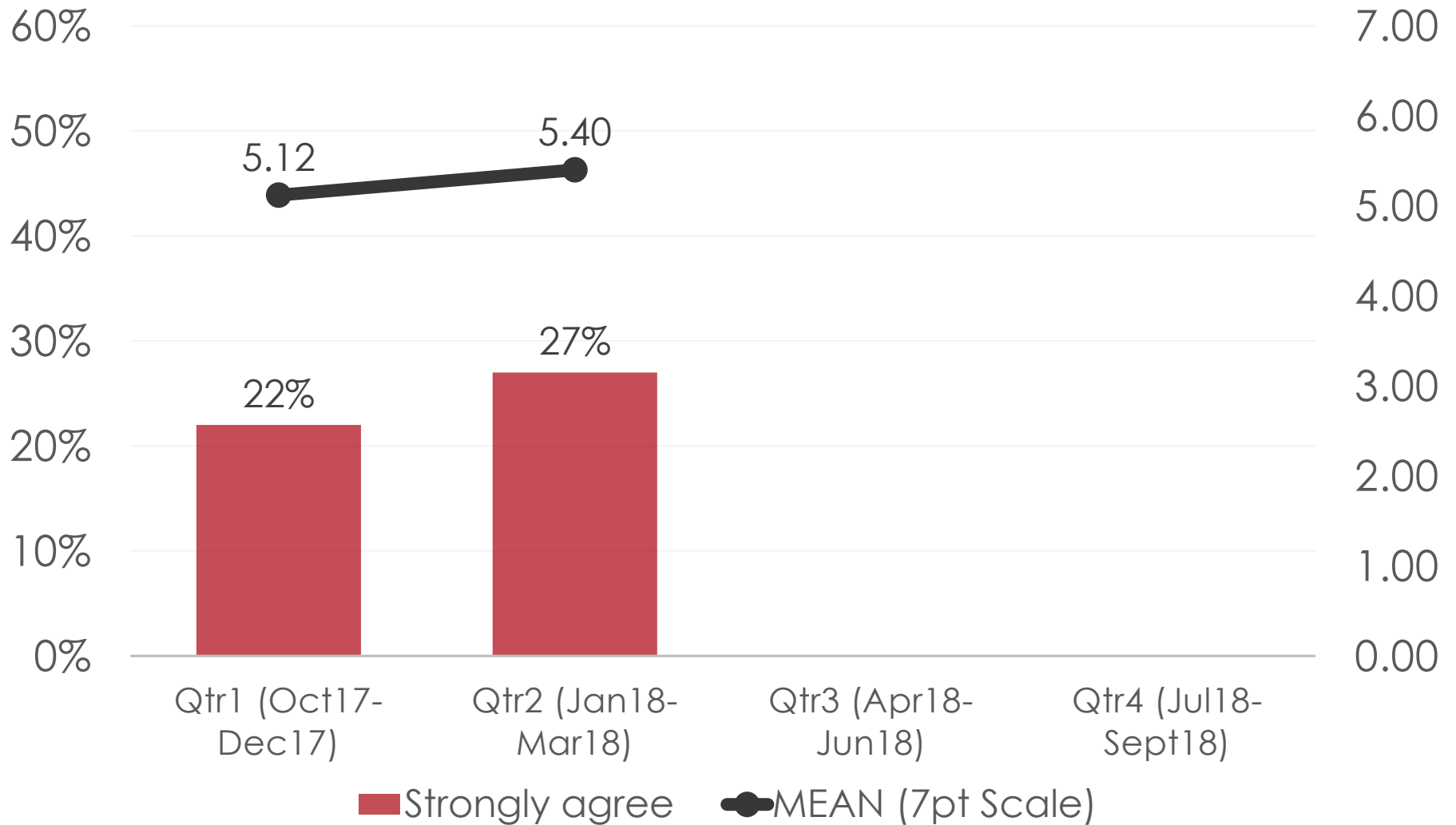
# Ease of getting around



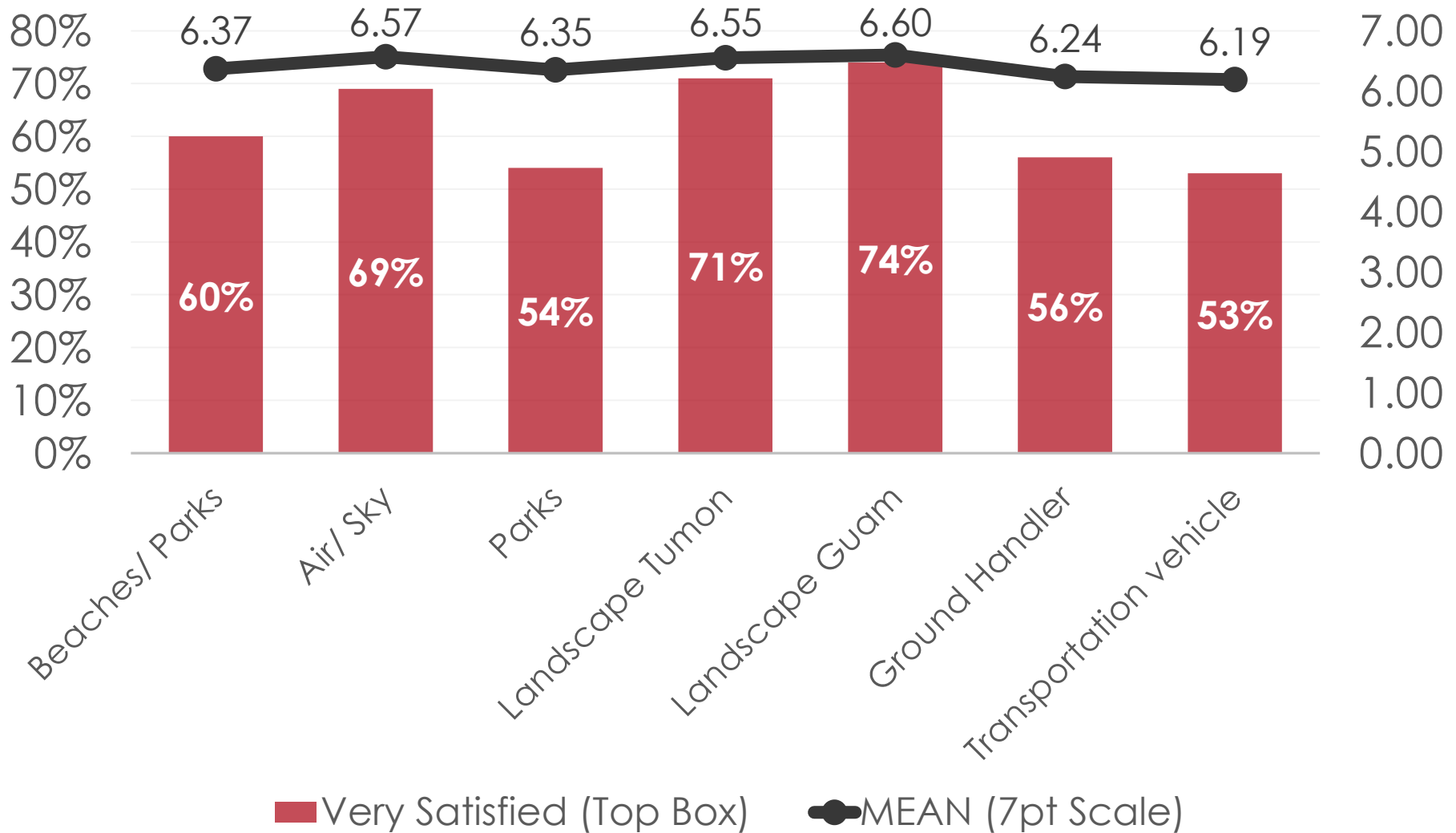
# Safety walking around at night



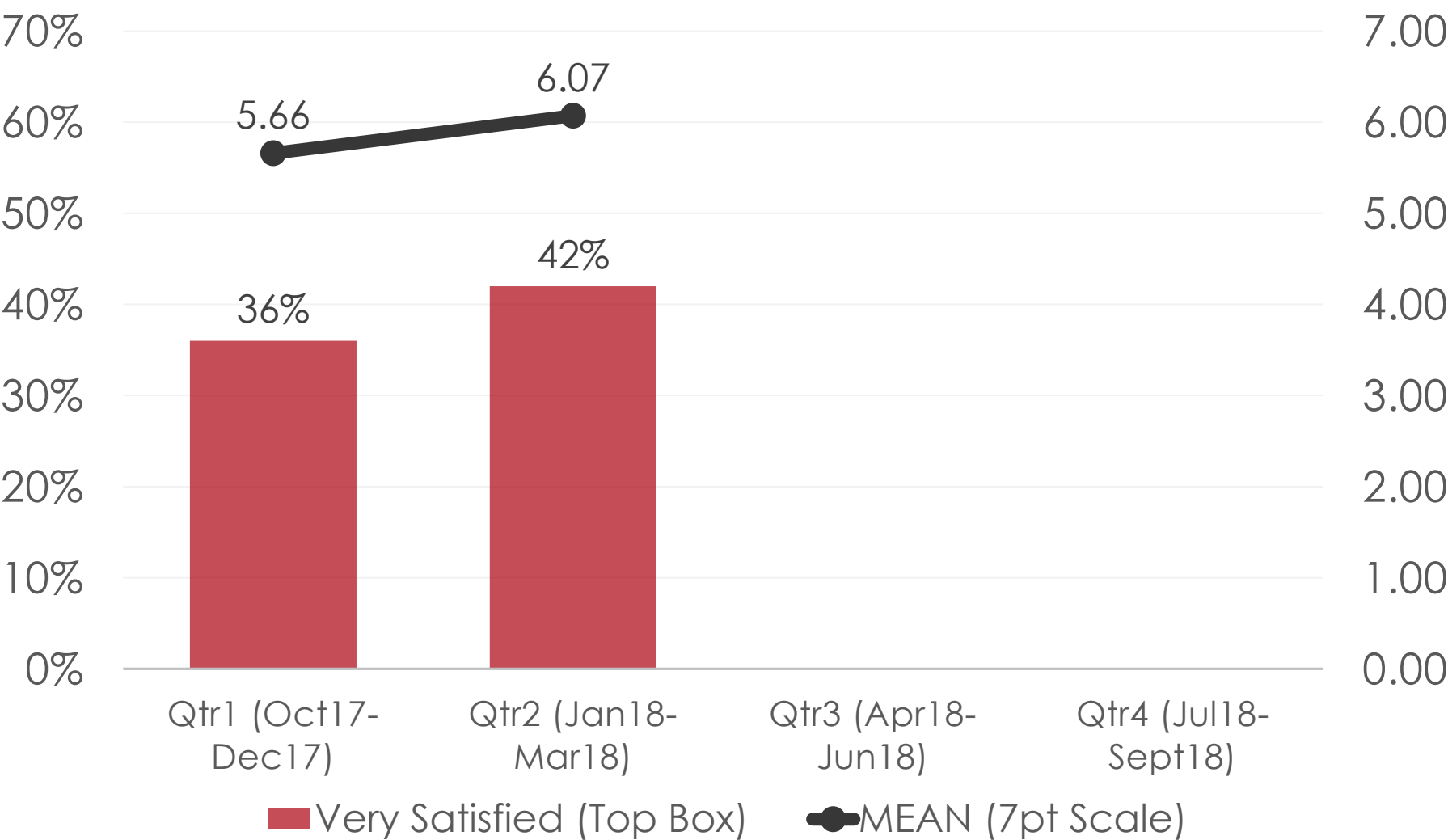
# Price of things on Guam



# GENERAL SATISFACTION – Quality/ Cleanliness



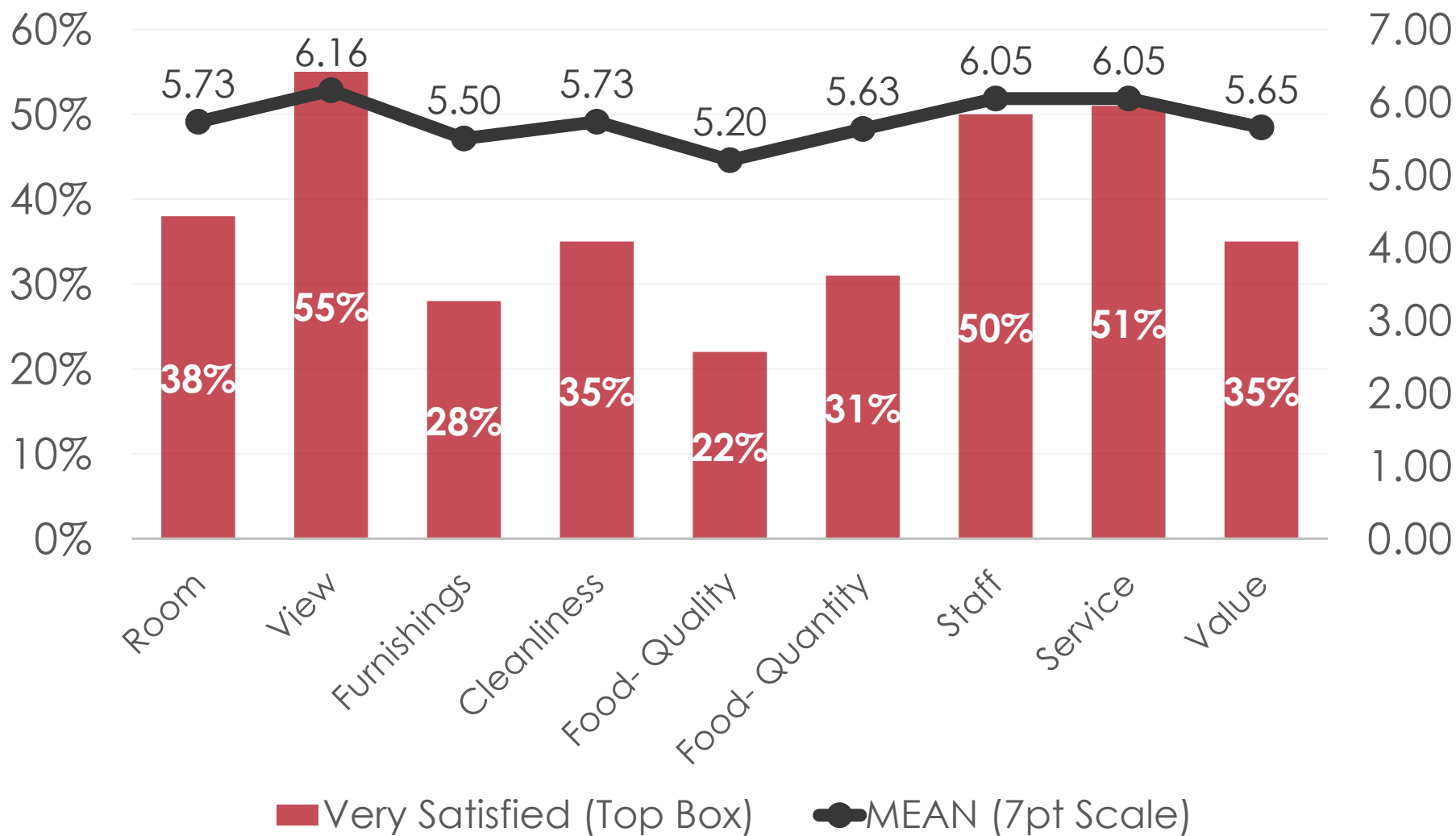
# ACCOMMODATIONS – OVERALL SATISFACTION



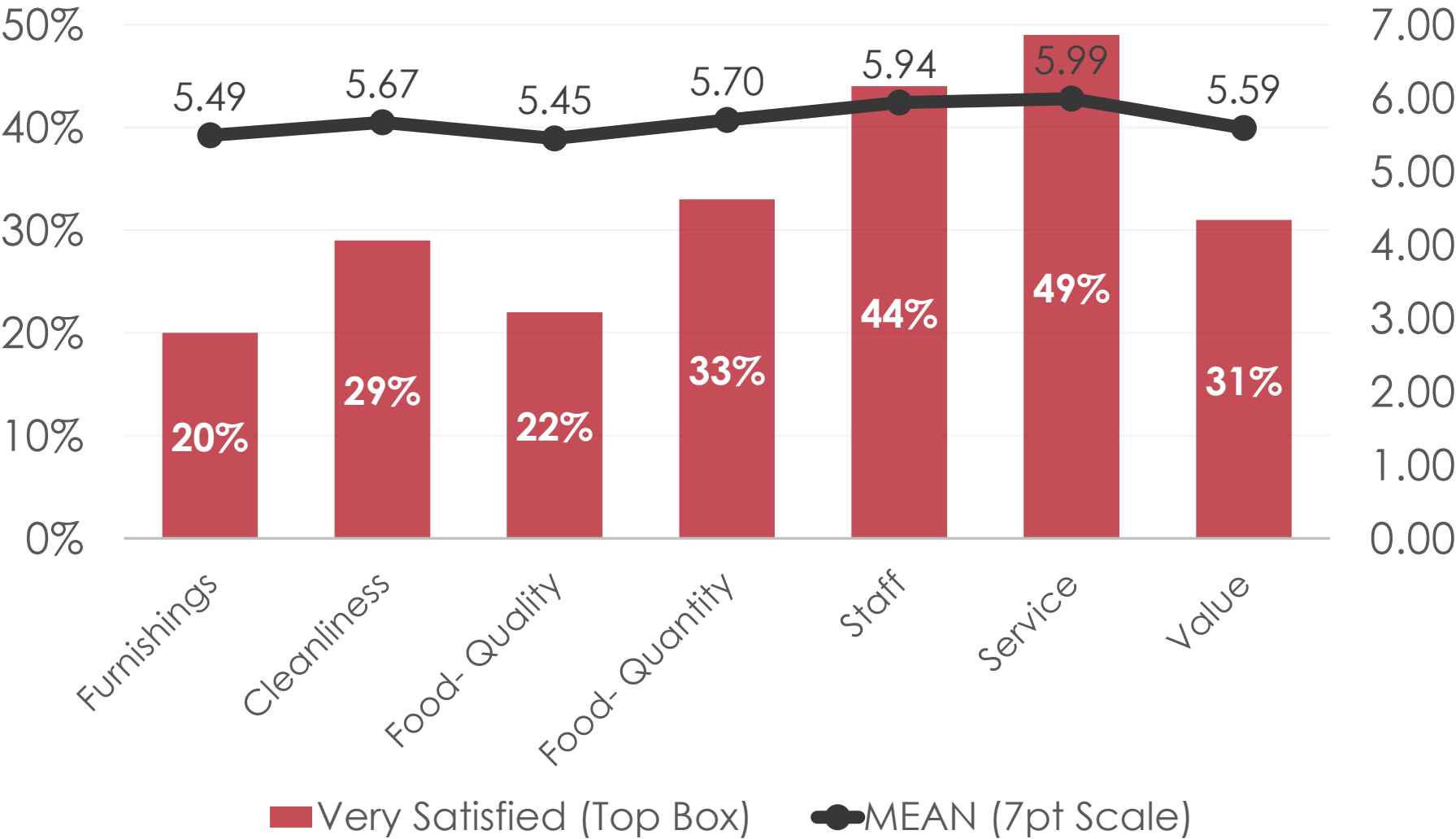


# ACCOMMODATIONS –

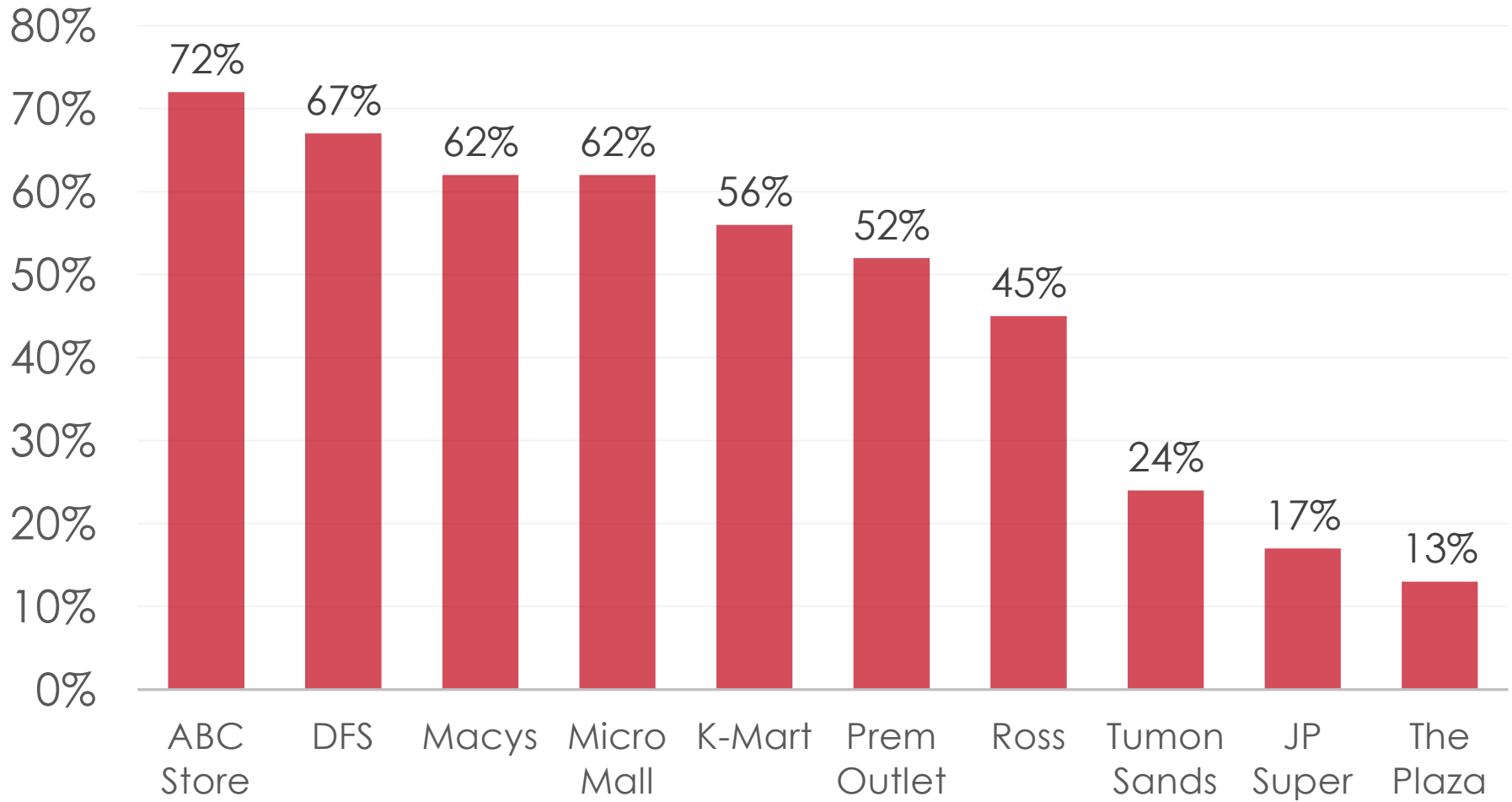
## Satisfaction by Category



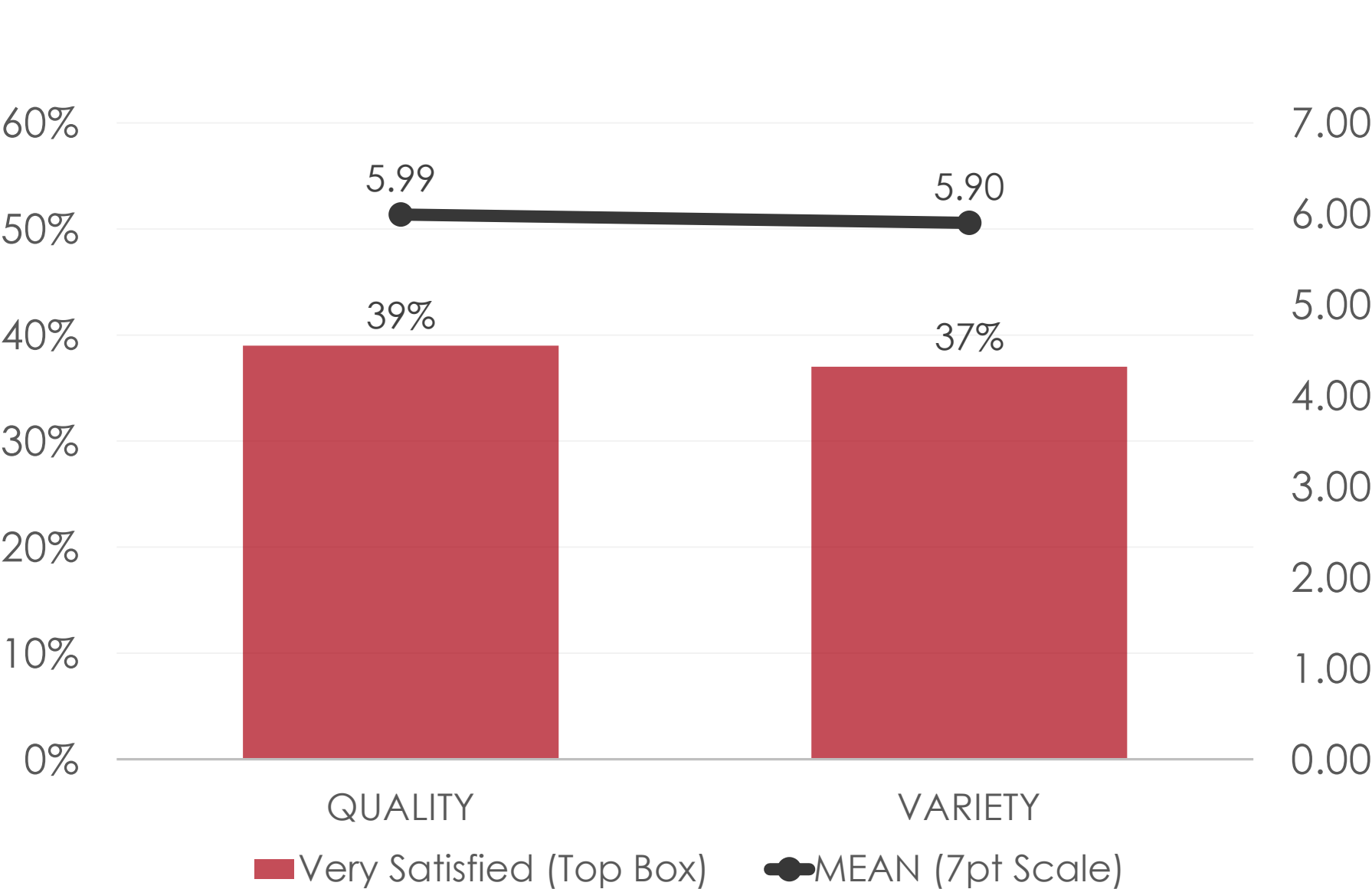
# DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



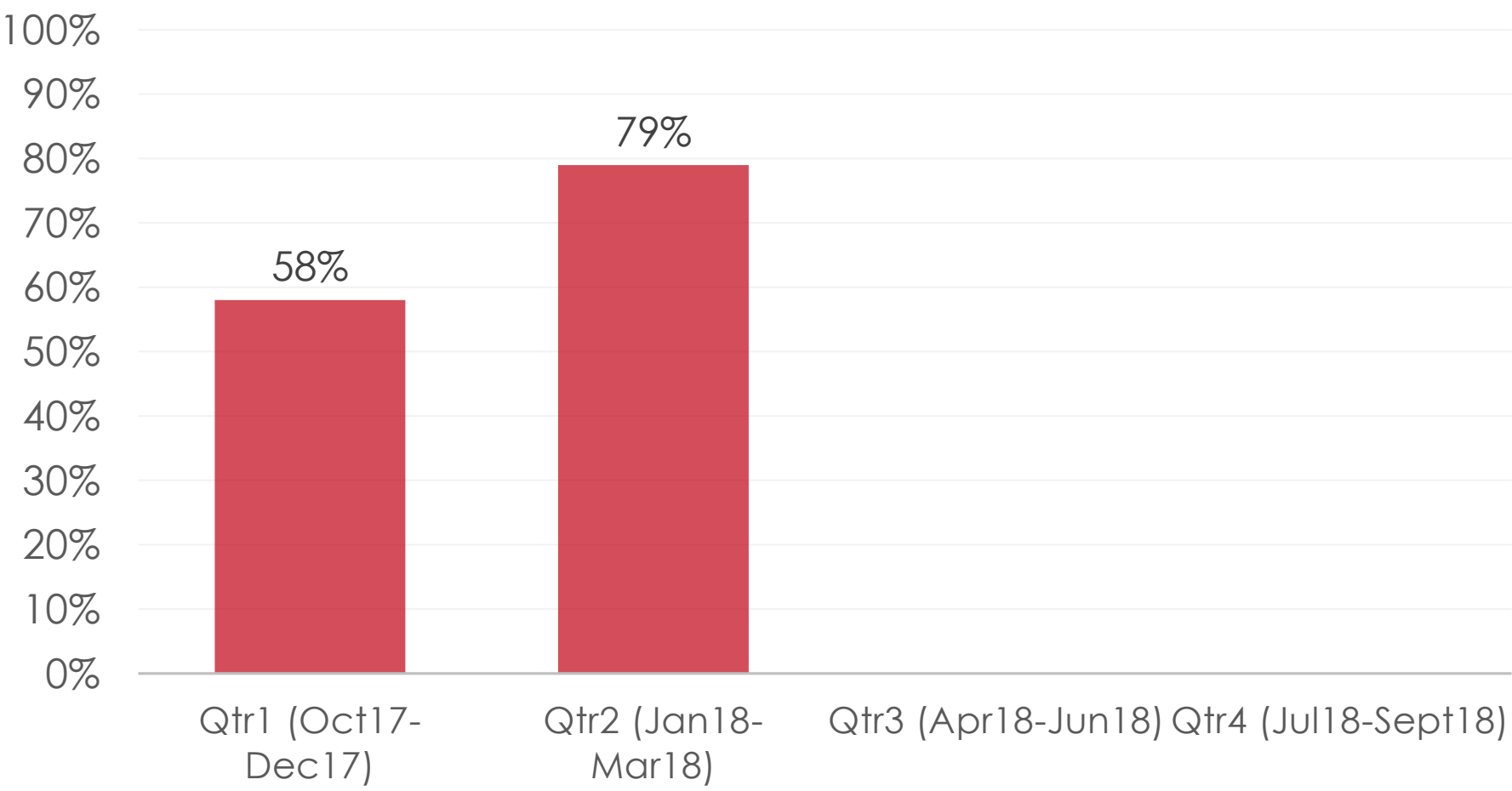
# Shopping Malls/ Stores (Top Responses)



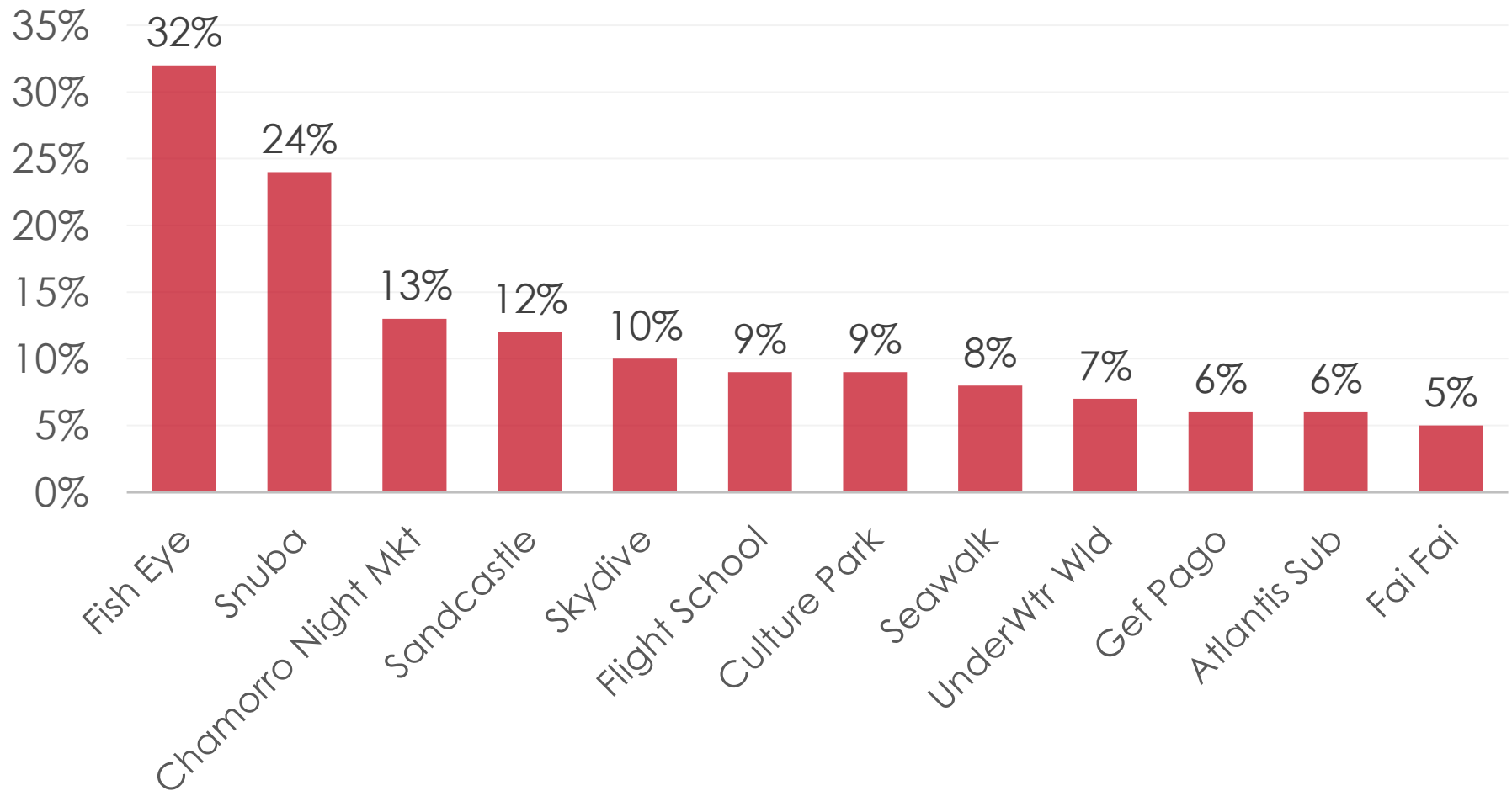
# SHOPPING - SATISFACTION



# OPTIONAL TOUR PARTICIPATION

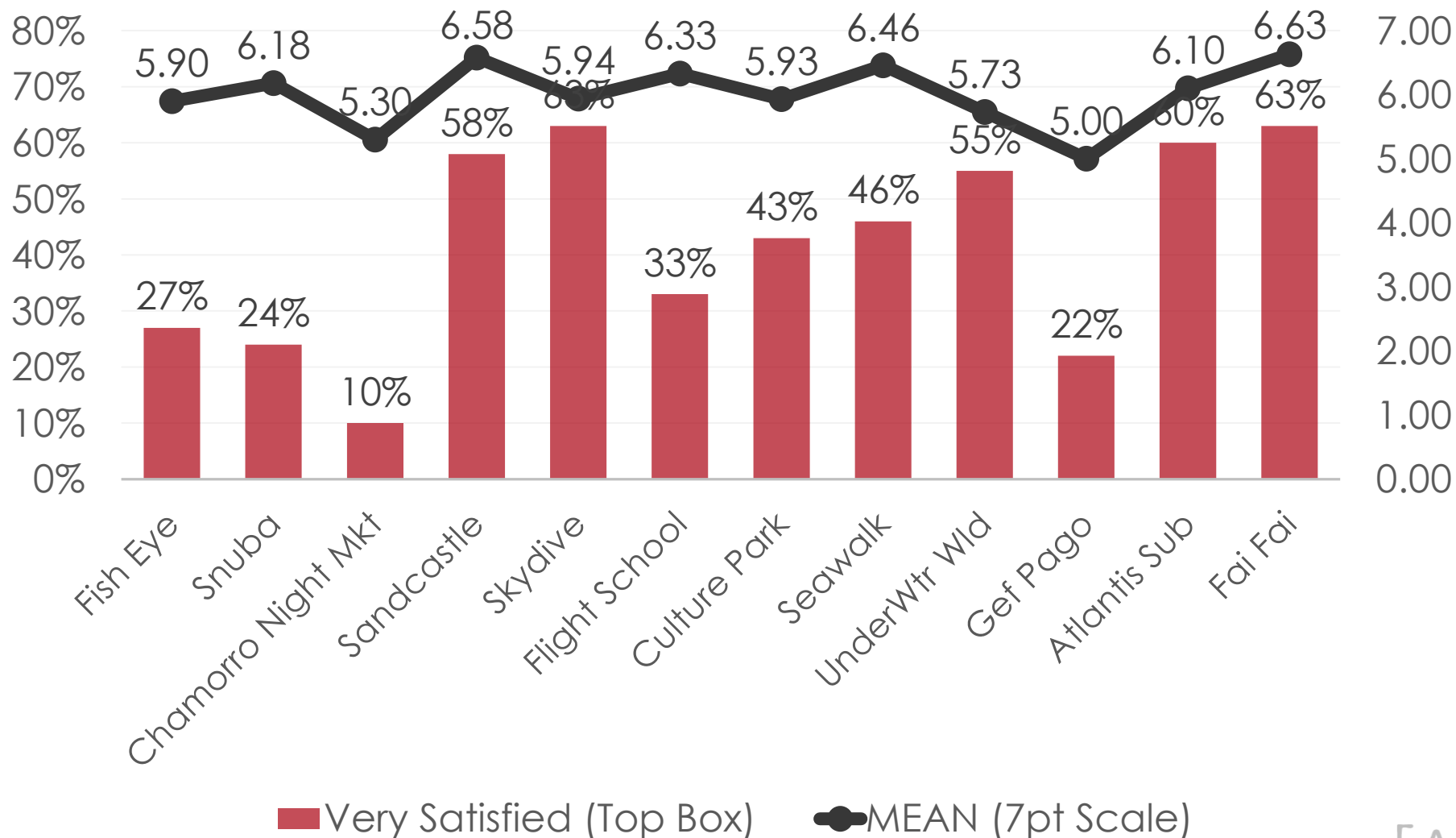


# Optional Tour Participation (Top Responses/ 5%+)

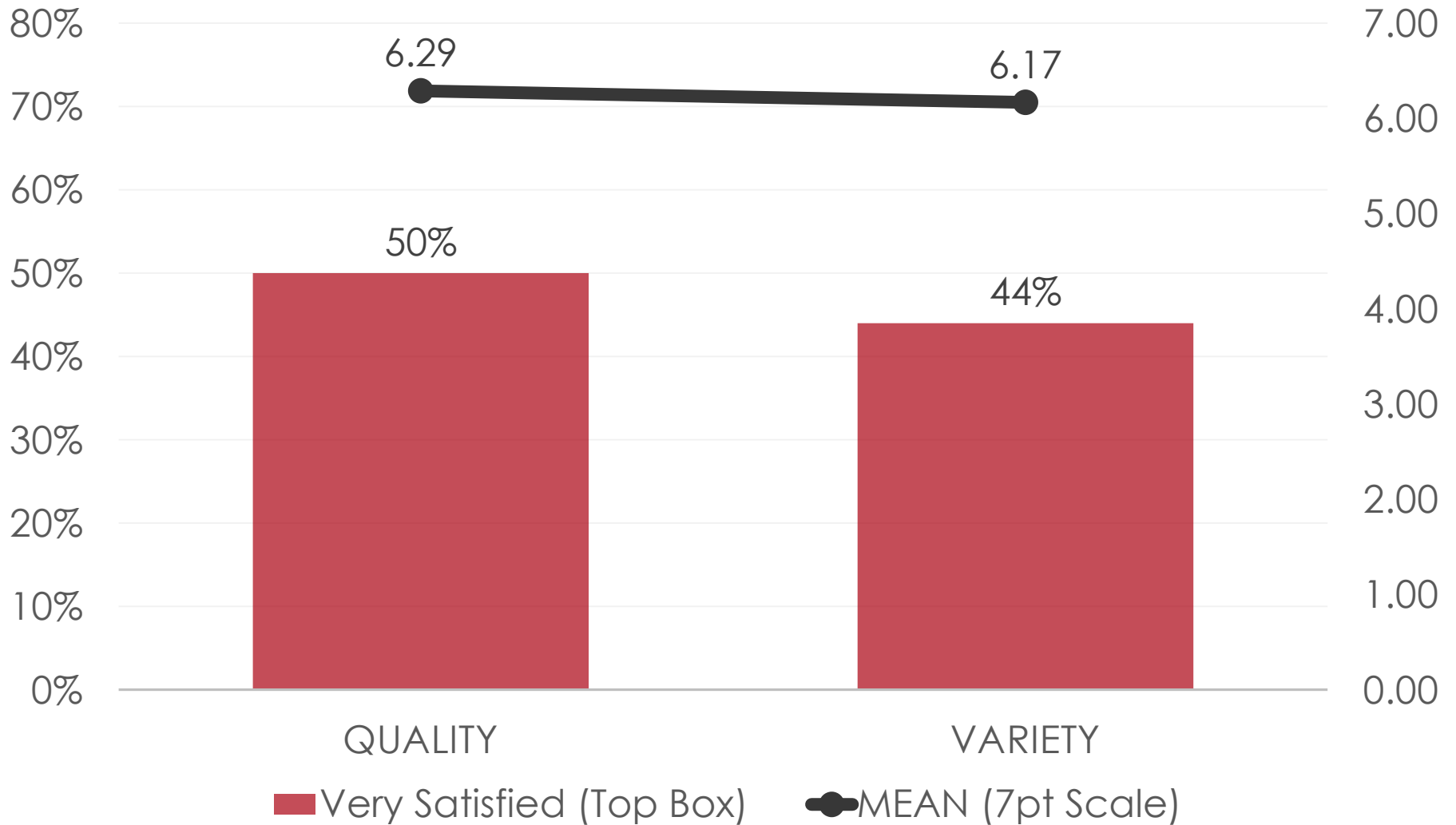


# Optional Tour Satisfaction

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

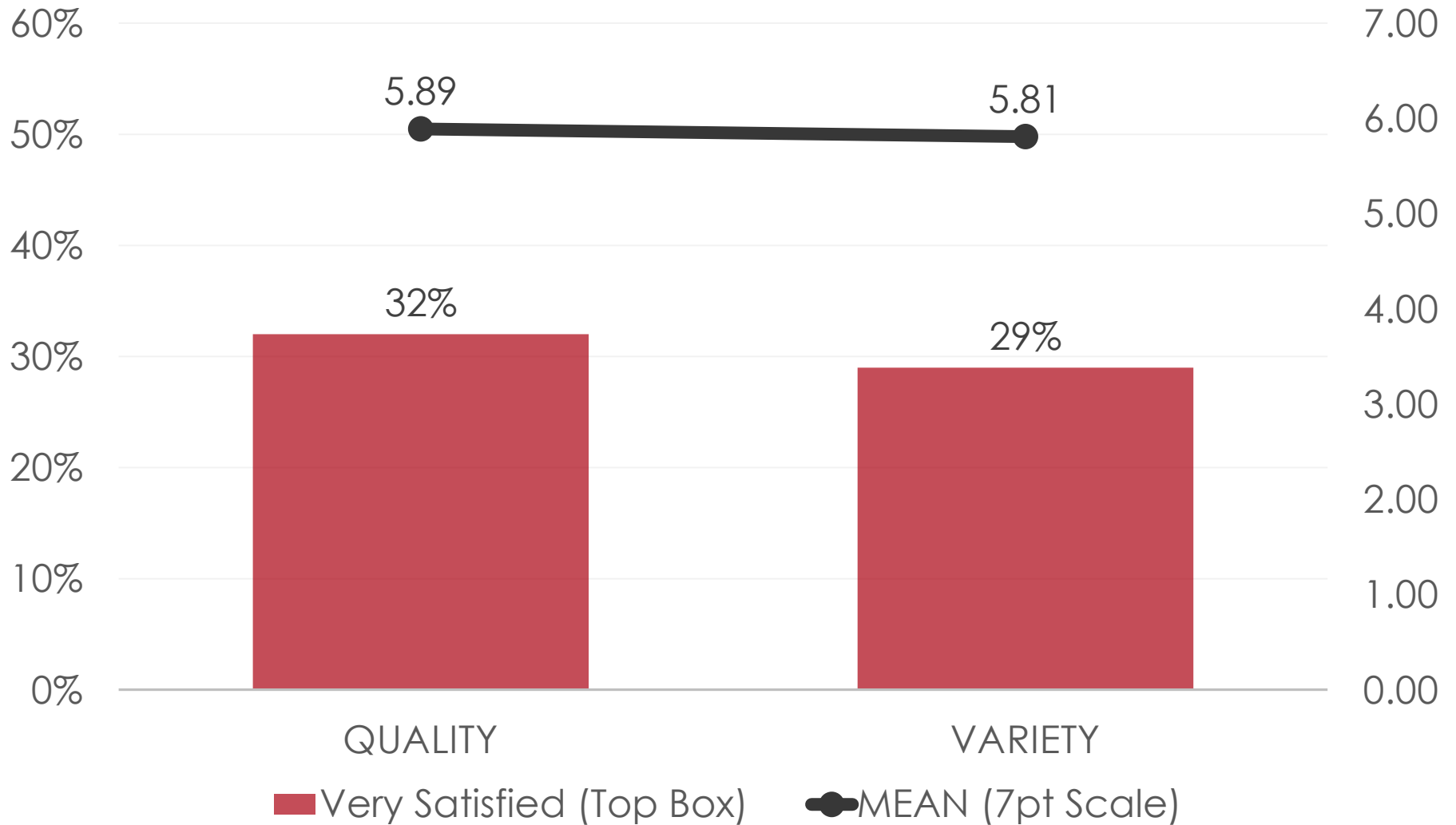


# DAY TOUR - SATISFACTION

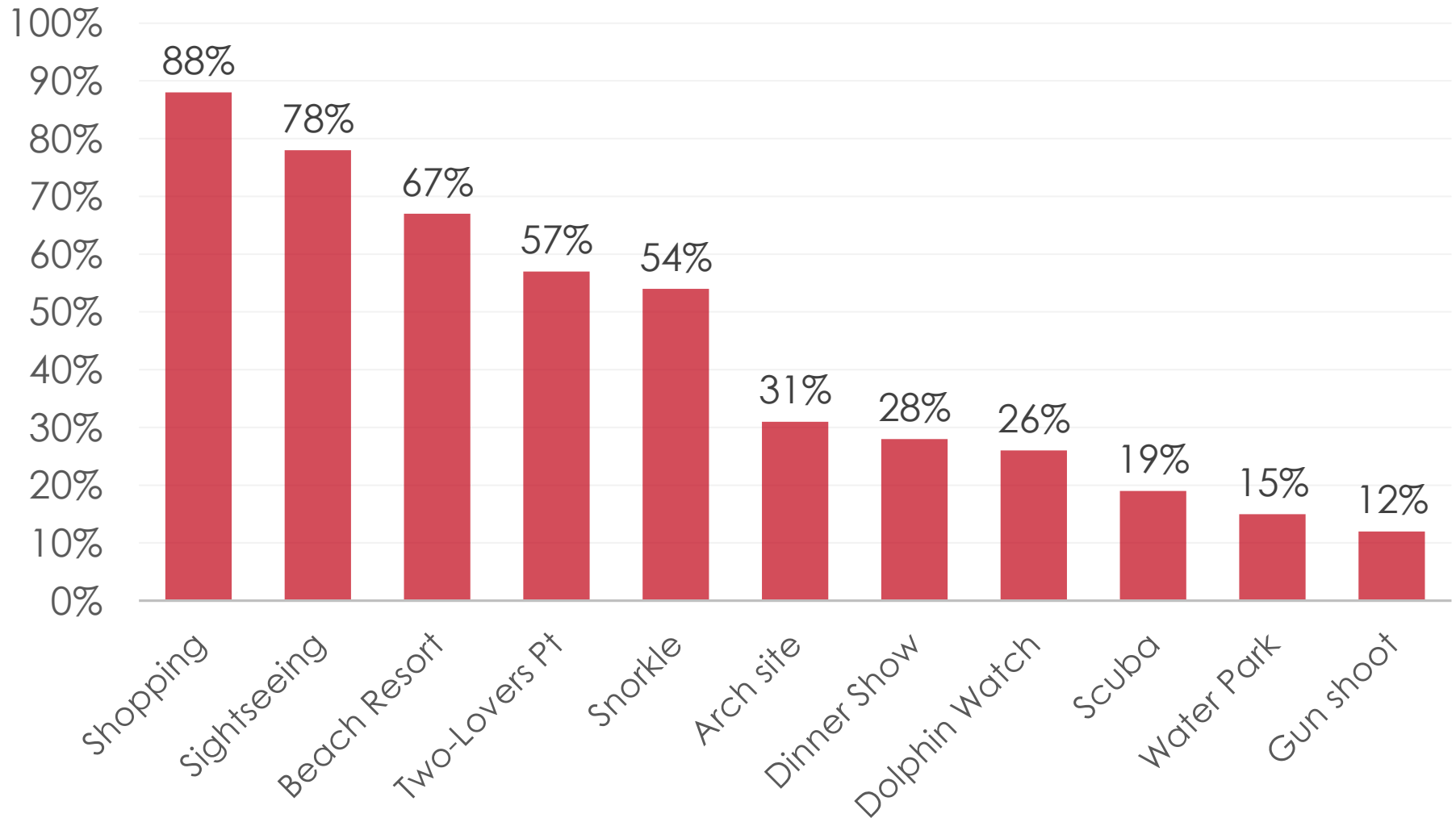




# NIGHT TOUR - SATISFACTION



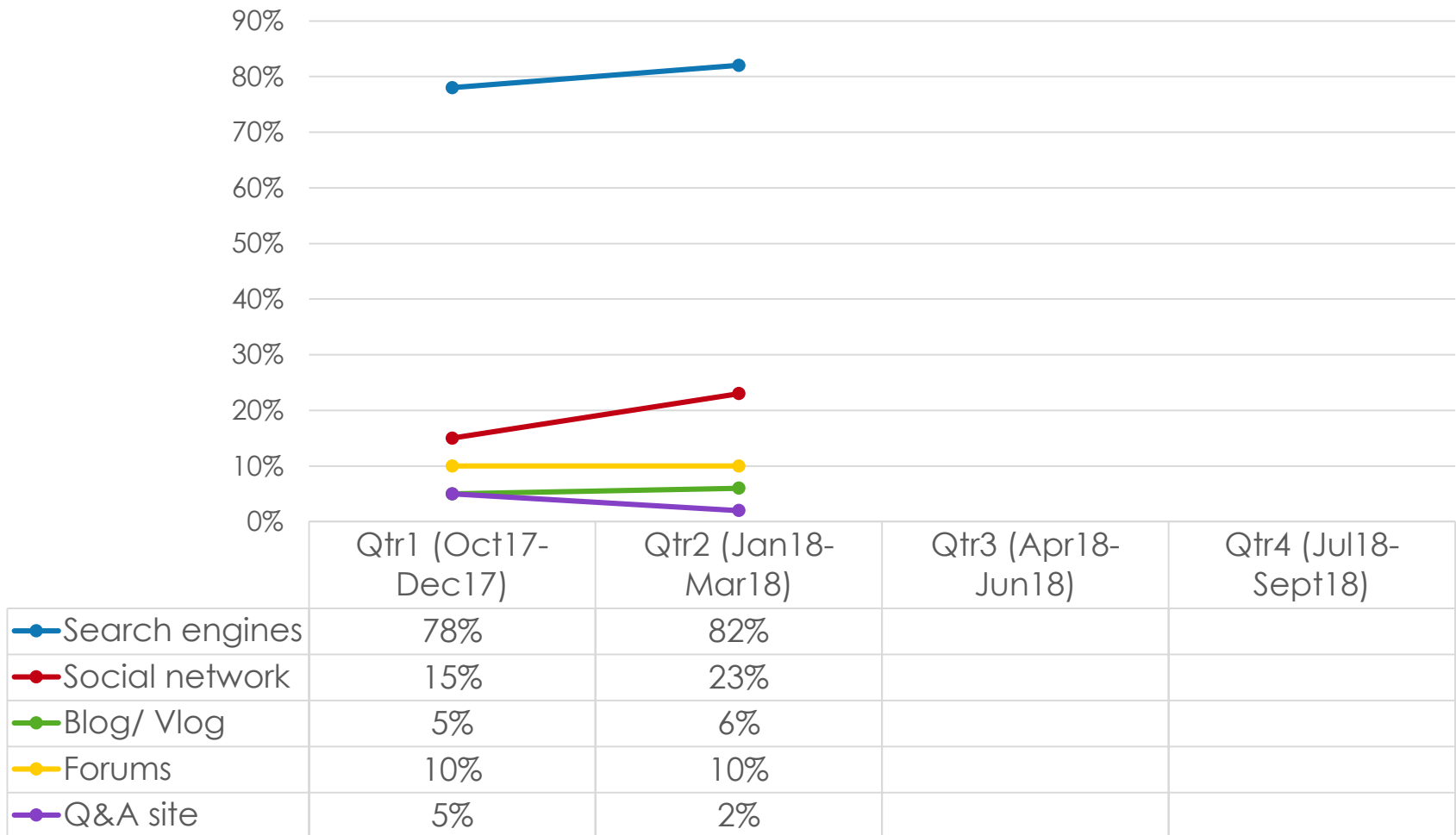
# Activities Participation (Top Responses)



# SECTION 5

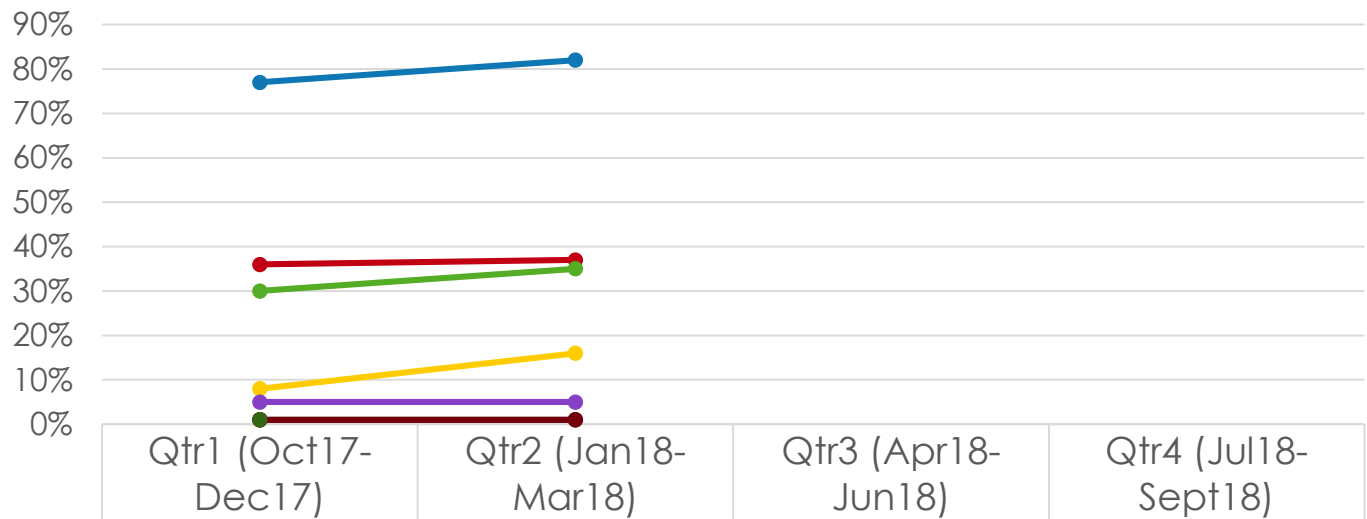
# PROMOTIONS

# INTERNET- GUAM SOURCES OF INFORMATION



# INTERNET- SOURCES OF INFORMATION

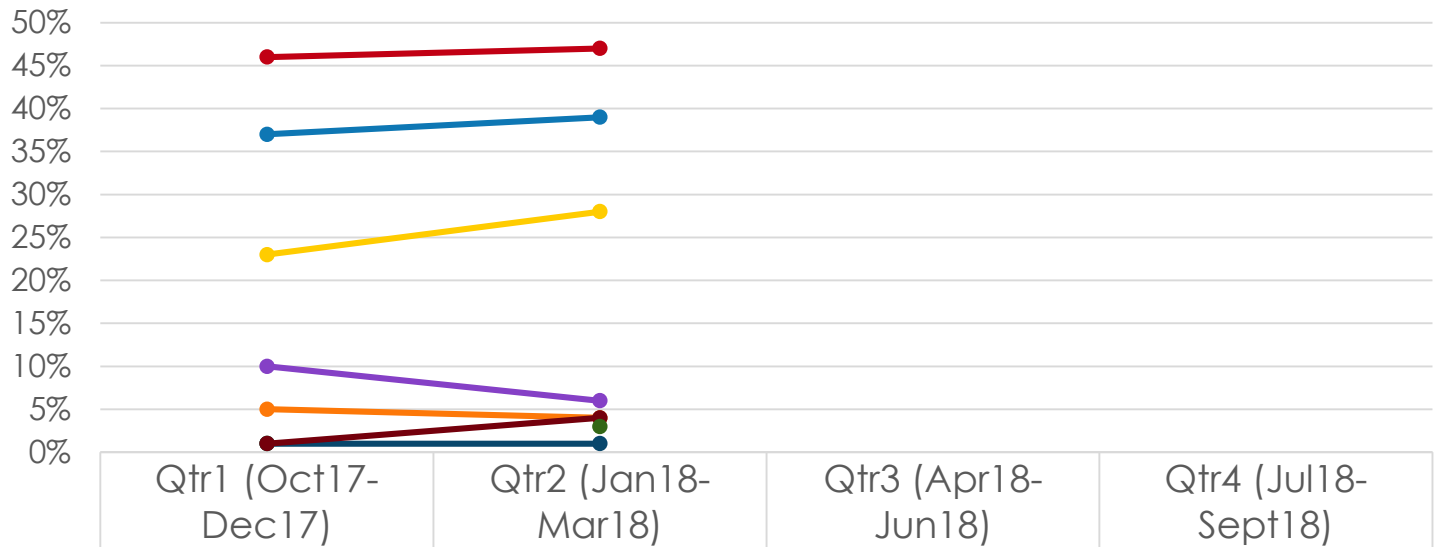
## Things to do on Guam



Google	77%	82%		
Facebook	36%	37%		
Yahoo	30%	35%		
Instagram	8%	16%		
Online booking site	5%	5%		
Baidu	1%	1%		
Twitter	1%	1%		
Weibo	1%	1%		
Sina	1%			

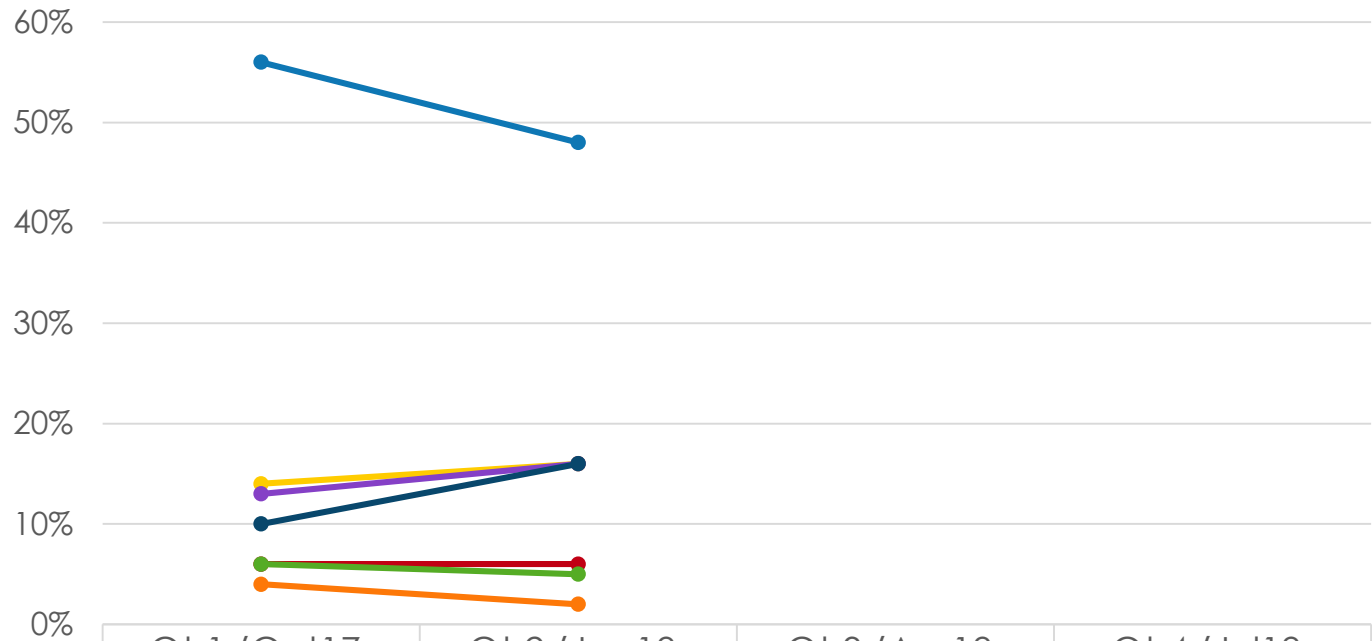
# INTERNET- SOURCES OF INFORMATION

## GVB



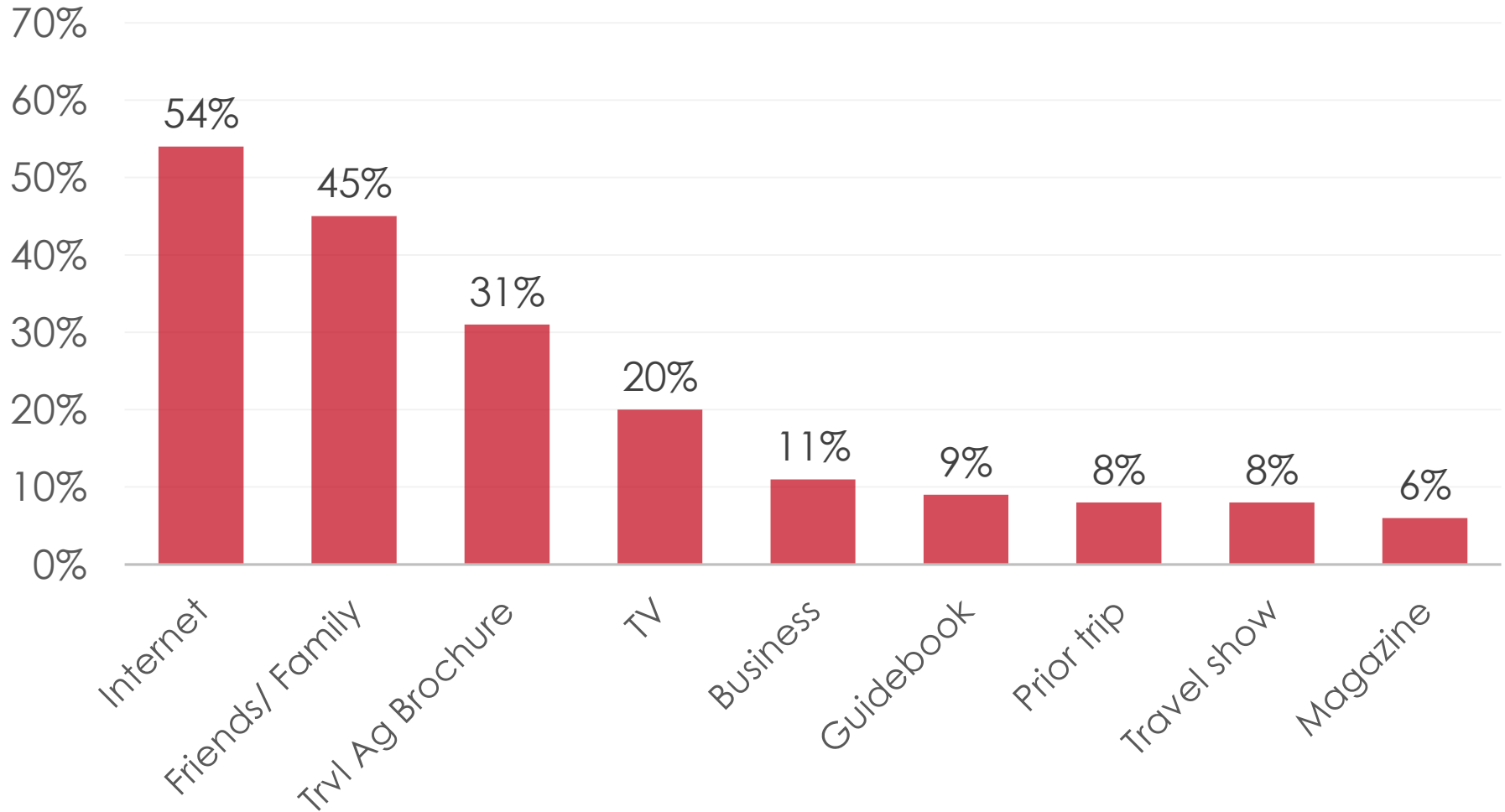
None	37%	39%		
GVB Website	46%	47%		
GVB Weibo	1%			
GVB Facebook	23%	28%		
GVB IG	10%	6%		
GVB Blog	5%	4%		
GVB Sina	1%	1%		
GVB Café	1%	4%		
GVB Twitter		3%		

# TRAVEL MOTIVATION



	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Friends/ Family	56%	48%		
Company/ Bus Trip	6%	6%		
Internet	6%	5%		
Travel Show	14%	16%		
Travel Agent	13%	16%		
Print	4%	2%		
Social Media	10%	16%		

# PRE-ARRIVAL SOURCES OF INFORMATION





# PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

## GVB EXIT SURVEY

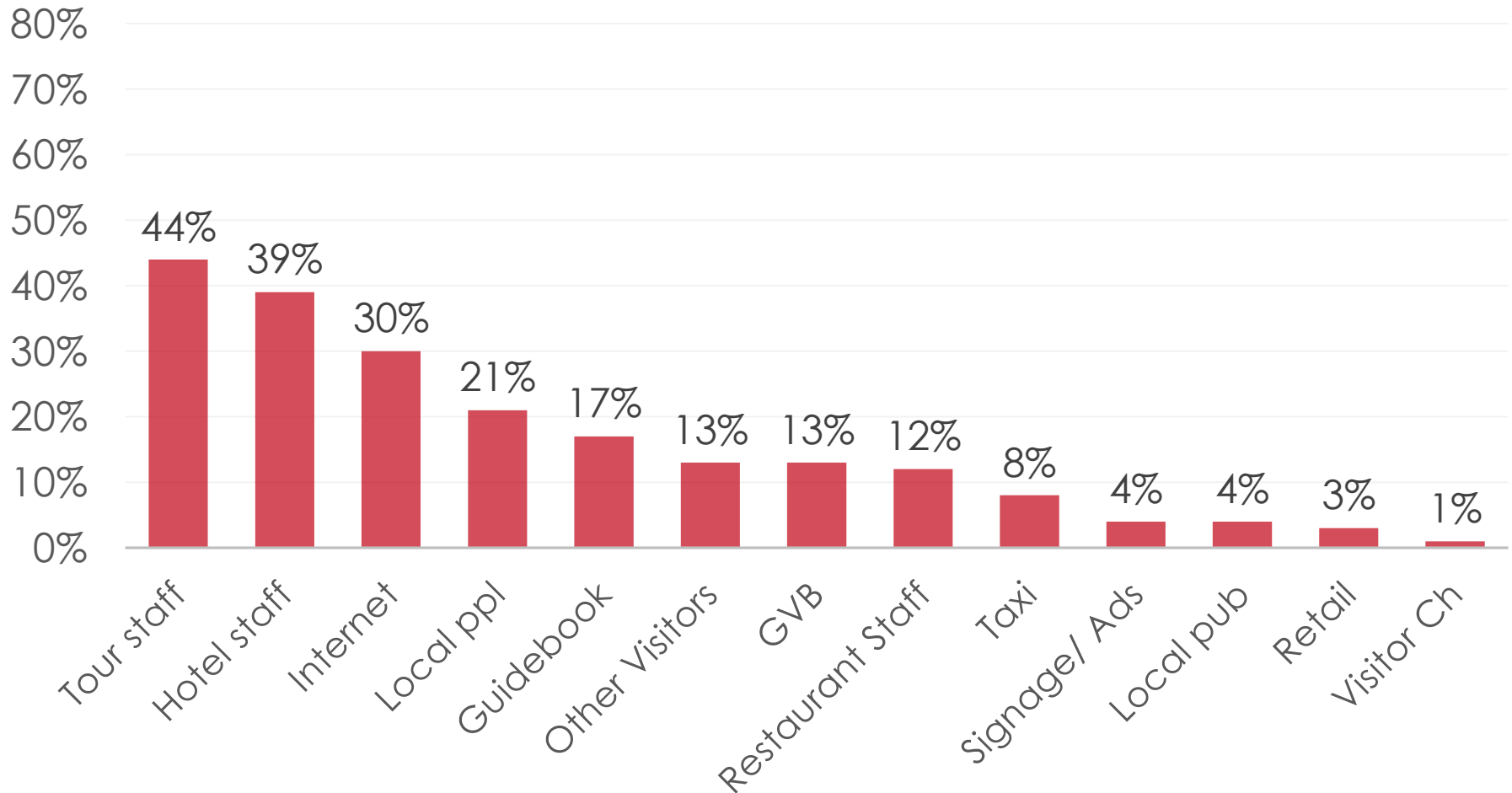
Q1 Please select the top three sources of information you used to find out about Guam before your trip:

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOON
		-	-	-	-	-
Q1	Internet/Mobile App	54%	57%	55%	67%	68%
	Friend or relative	45%	43%	46%	67%	24%
	Travel agent brochure	31%	14%	33%		44%
	TV	20%	29%	18%		28%
	Co-worker/ company travel department	11%	29%	12%		8%
	Travel guide book at bookstores	9%		8%		16%
	I have been to Guam before	8%	14%	6%	33%	4%
	Consumer travel shows	8%		10%		
	Guam Visitors Bureau promotional activities	8%		6%		4%
	Magazine (consumer)	6%	14%	7%		12%
	Newspaper	4%	14%	4%		4%
	Guam Visitors Bureau office	3%	14%	2%		
	Travel trade shows	3%		3%		4%
	Office LED display	1%		1%		
	Total	159	7	109	3	25

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:

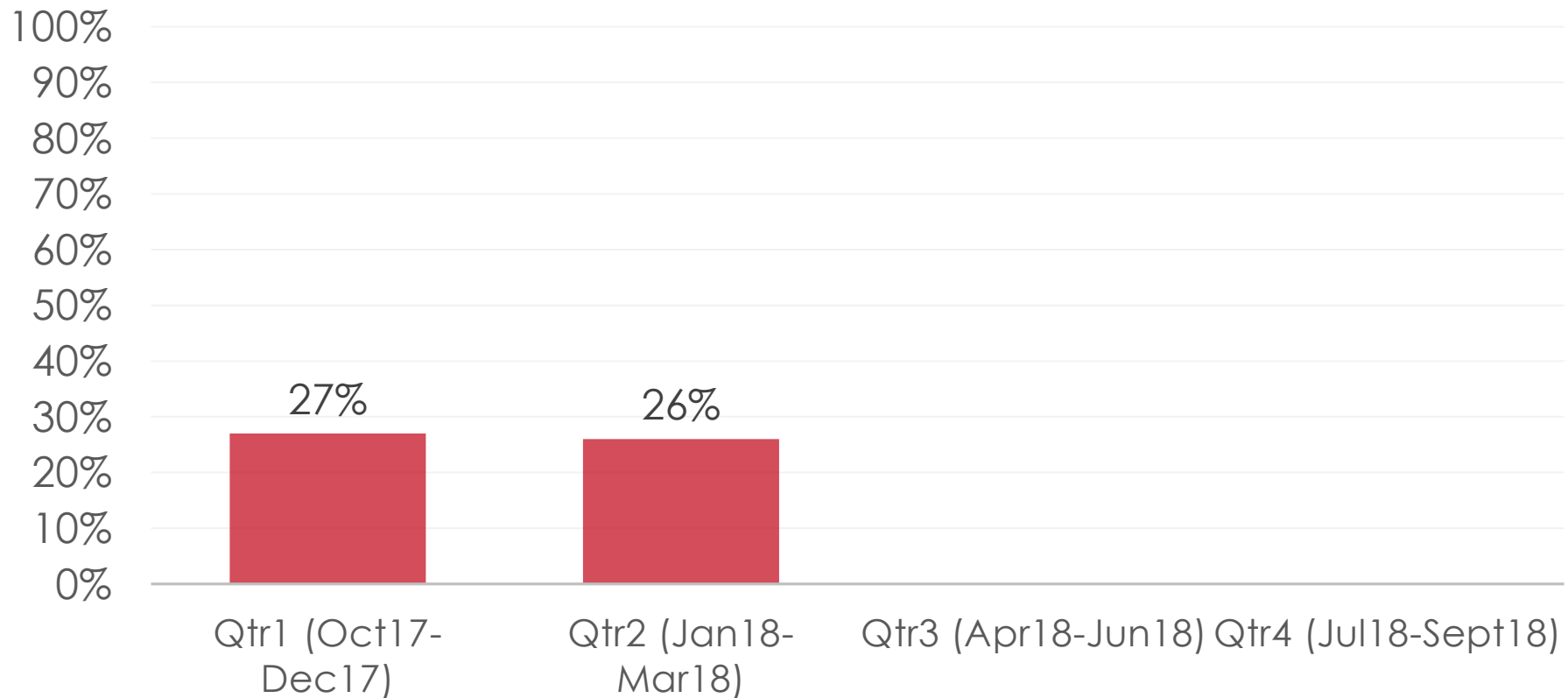
		TOTAL	MICE	SPORT/ ADV	WEDDING	HONEYMOON
		-	-	-	-	-
Q2	Tour staff	44%	57%	46%	33%	60%
	Hotel staff	39%	29%	37%	67%	20%
	Internet/Mobile App	30%	29%	27%		36%
	Local people	21%	14%	22%	100%	16%
	Guide books I brought with me	17%		18%		24%
	Other visitors	13%	14%	12%		12%
	Guam Visitors Bureau	13%	29%	12%		8%
	Restaurant staff (outside hotel)	12%		16%	33%	
	Taxi drivers	8%	14%	10%	33%	8%
	Signs/ advertisement	4%		4%		8%
	Local publication	4%		3%		8%
	Retail staff	3%	14%	4%		4%
	Visitors channel	1%	14%	1%		
	Total	158	7	109	3	25

Prepared by Anthology Research

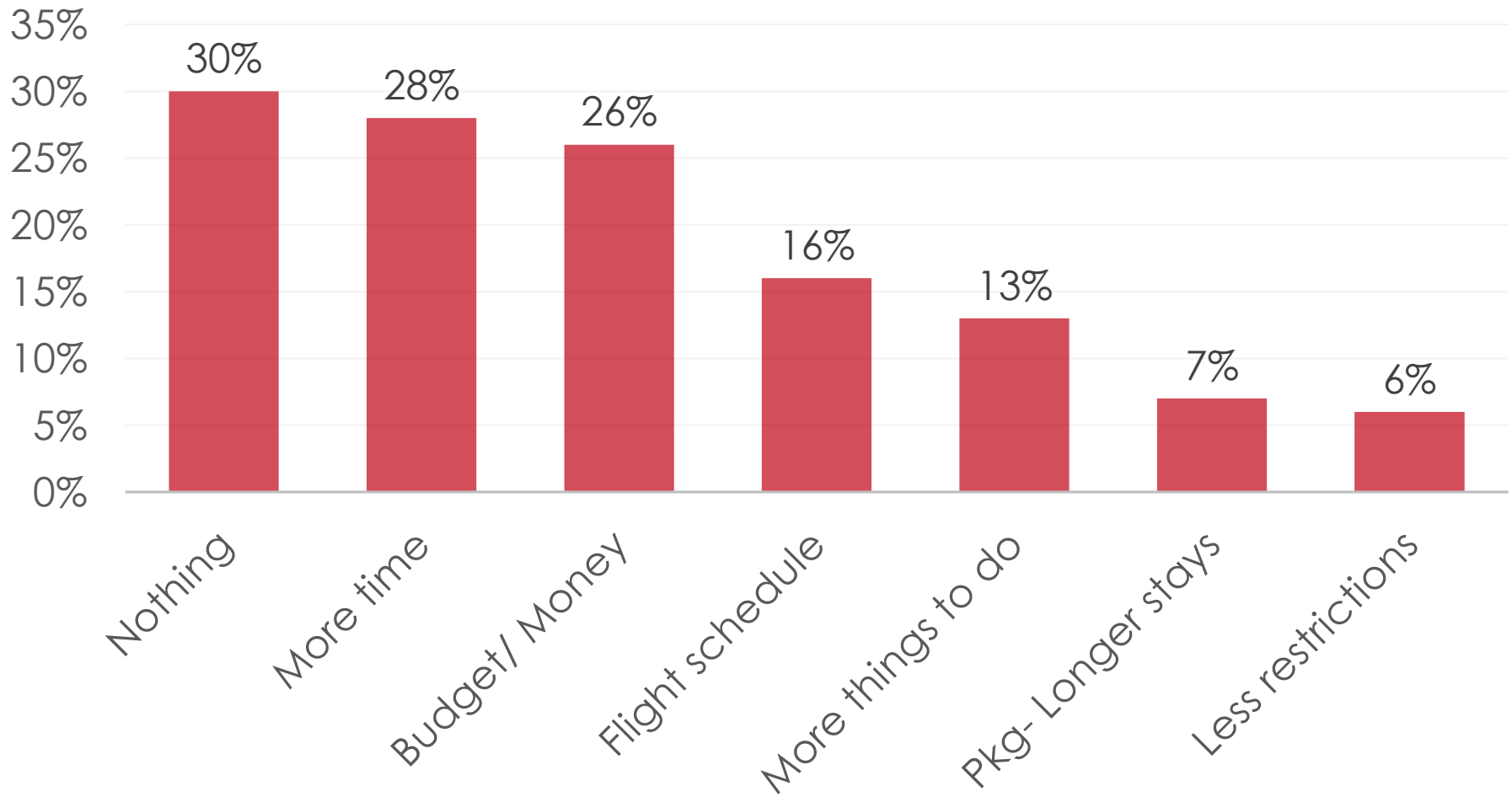
# SECTION 6

## FUTURE TRAVEL TO GUAM

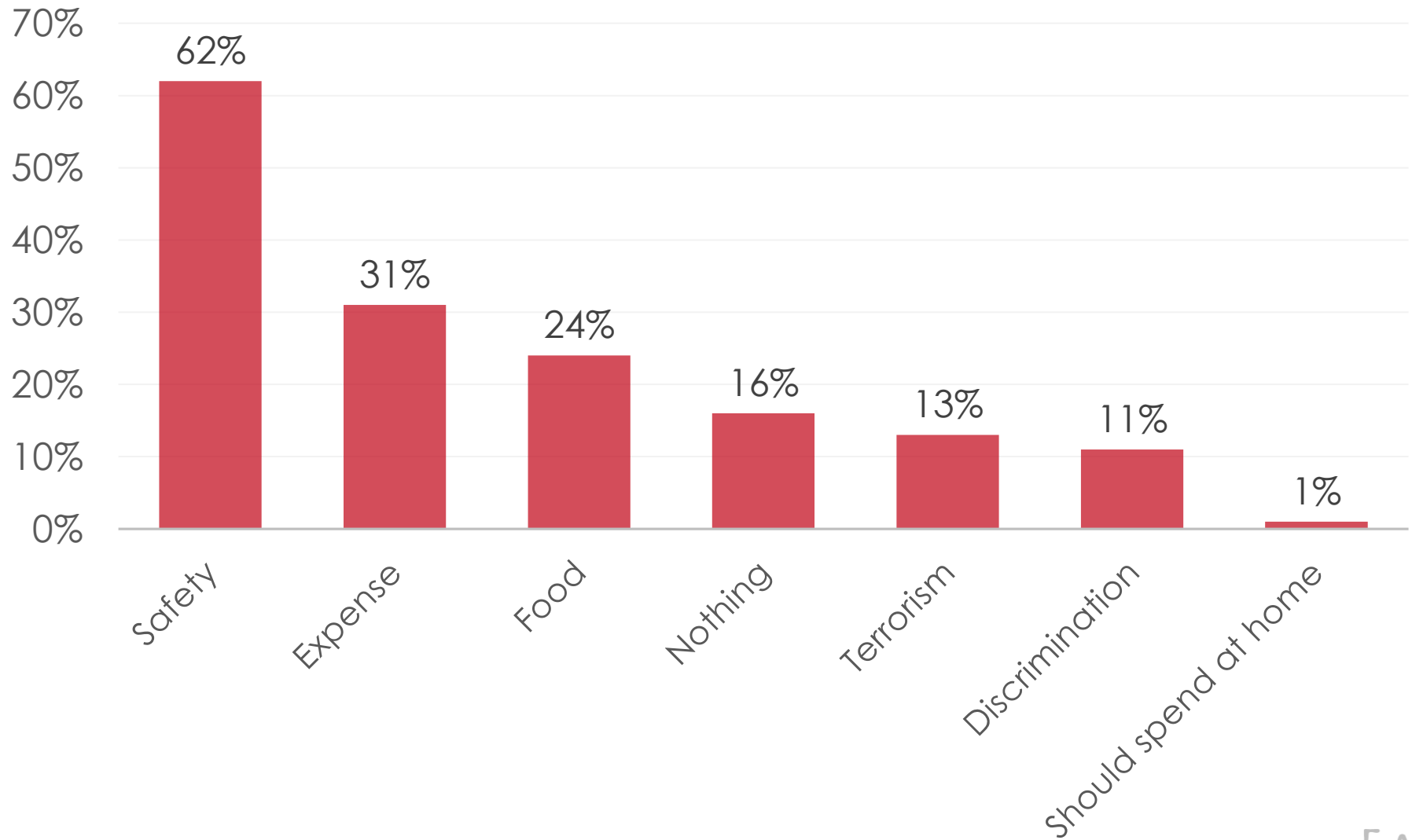
# Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



# FUTURE TRAVEL CONCERNS

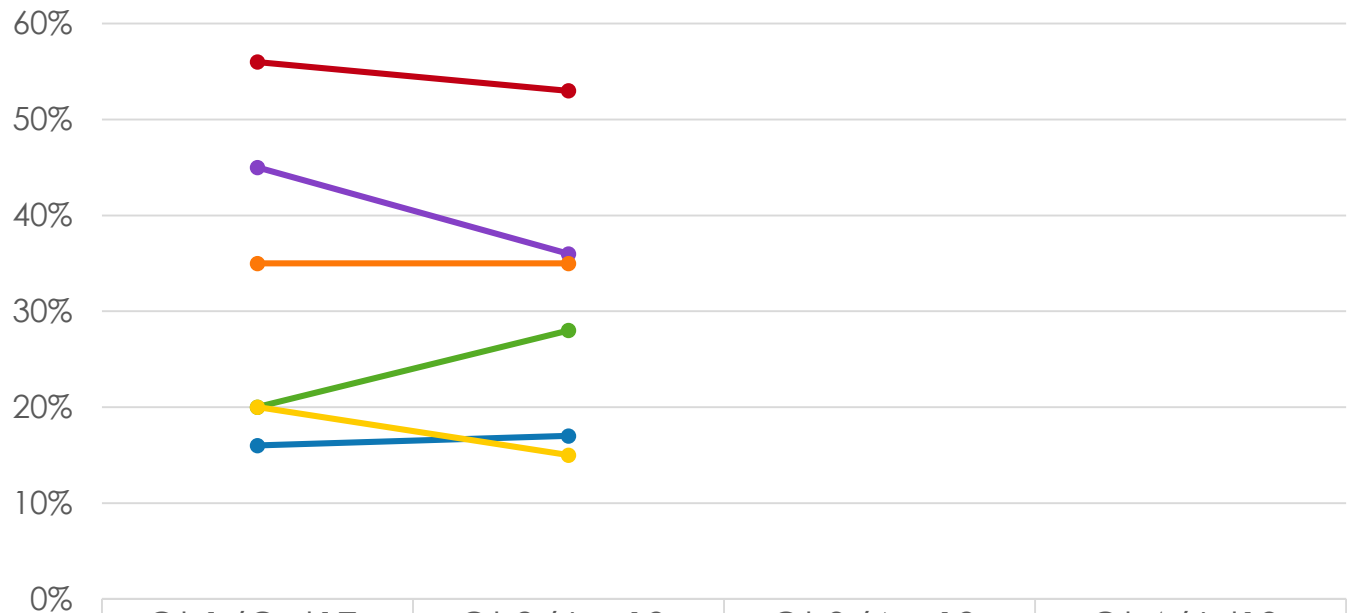


# SECTION 7

## GUAM CULTURE

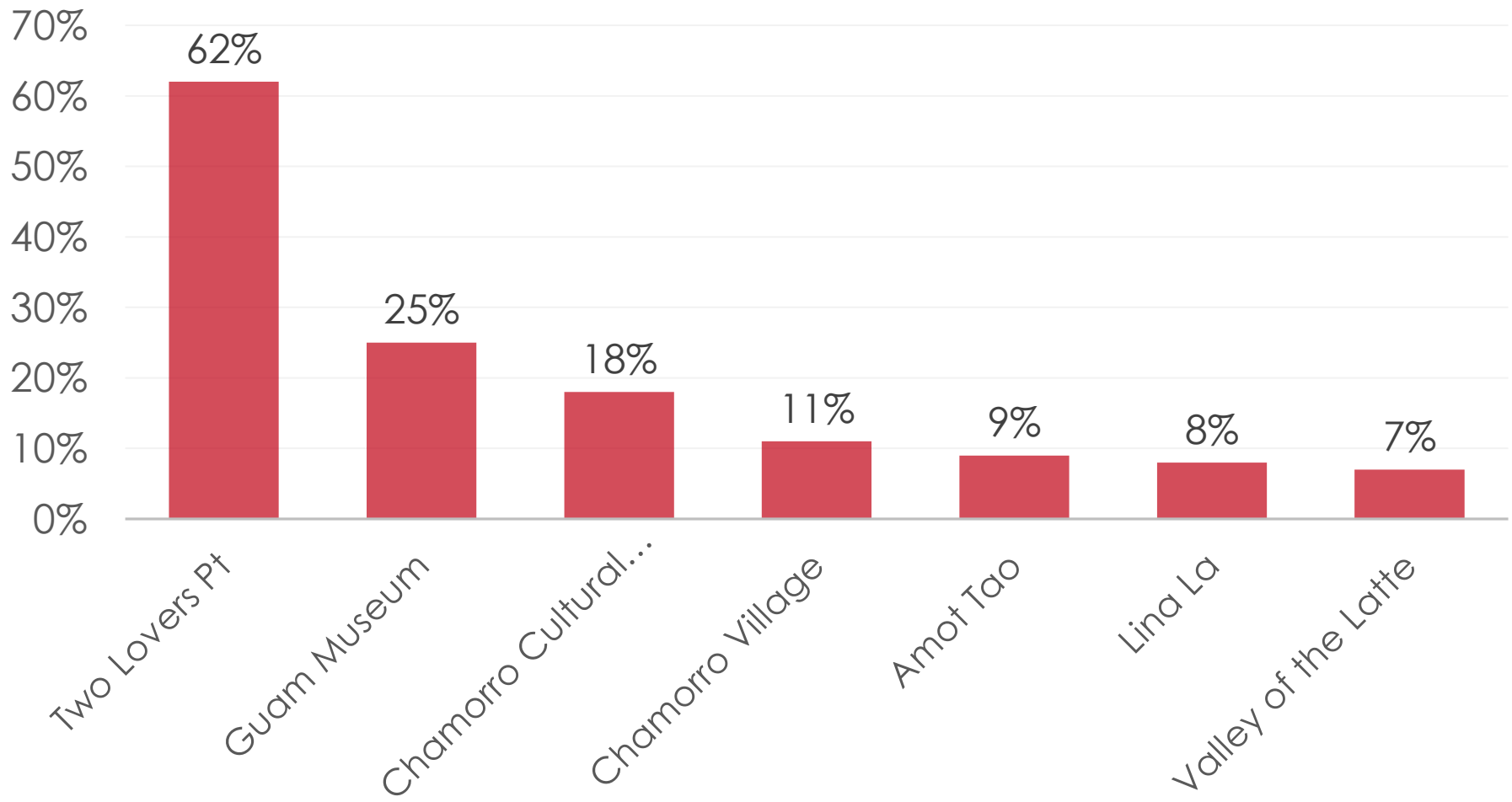


# EXPERIENCED- CHAMORRO/ HAFA ADAI SPIRIT

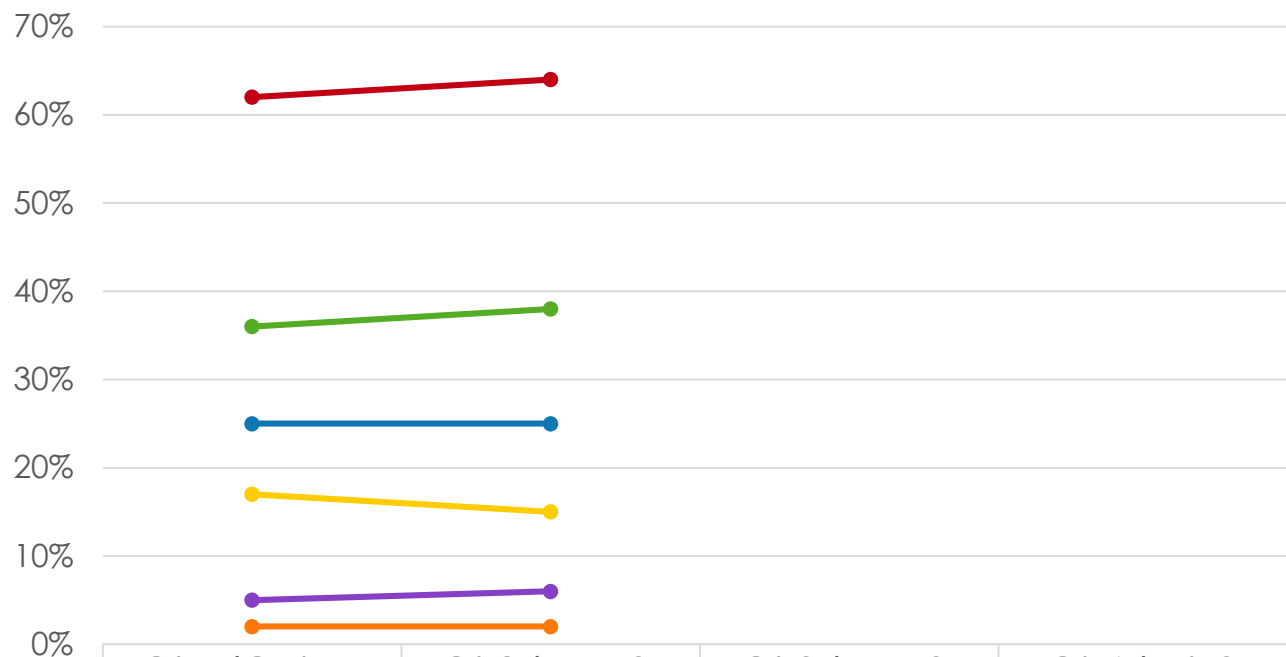


	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Did NOT experience	16%	17%		
Beaches	56%	53%		
Chamorro cuisine	20%	28%		
Night Market	20%	15%		
Socializing- locals	45%	36%		
Local Music	35%	35%		

# EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS

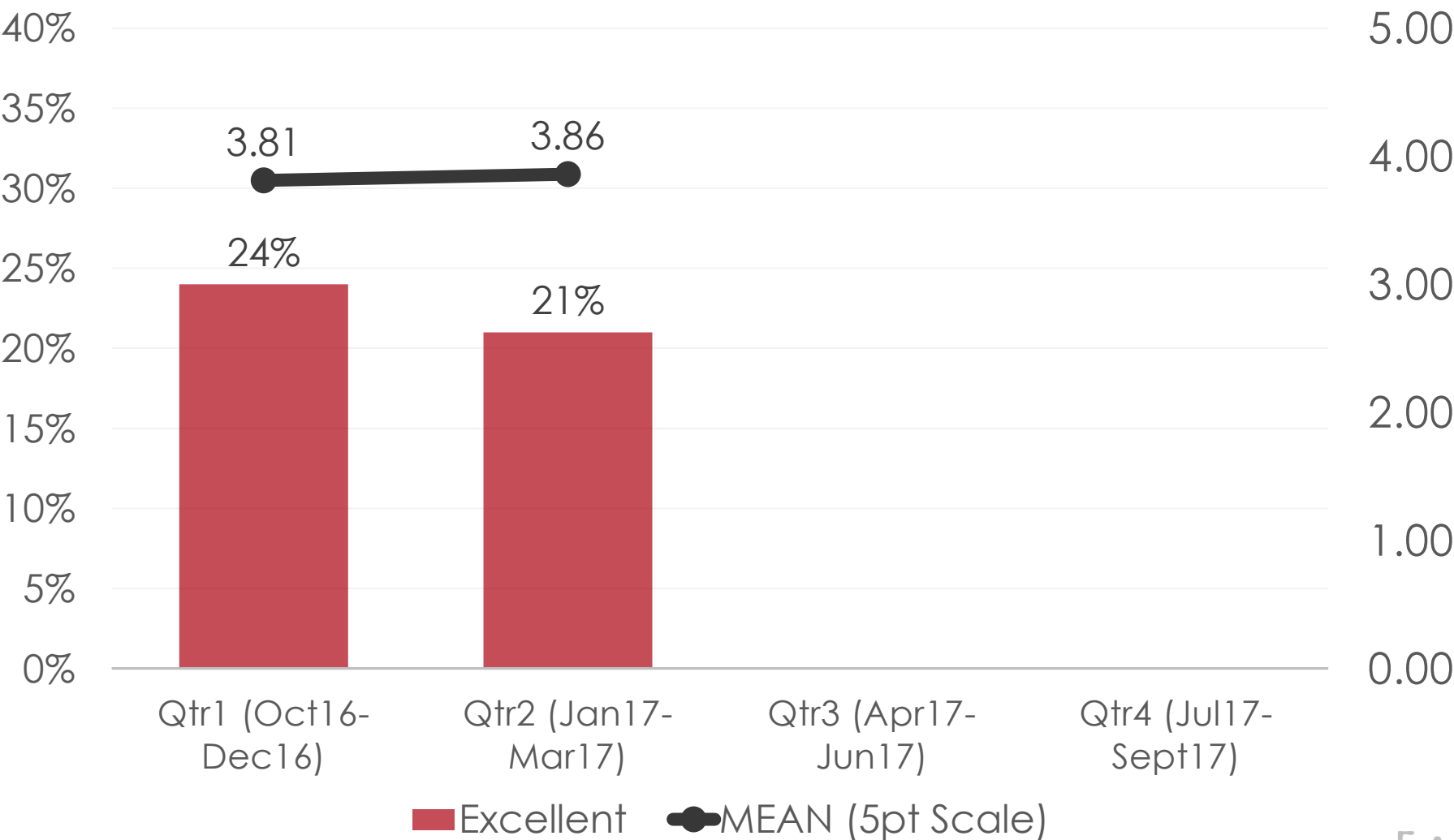


# SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS

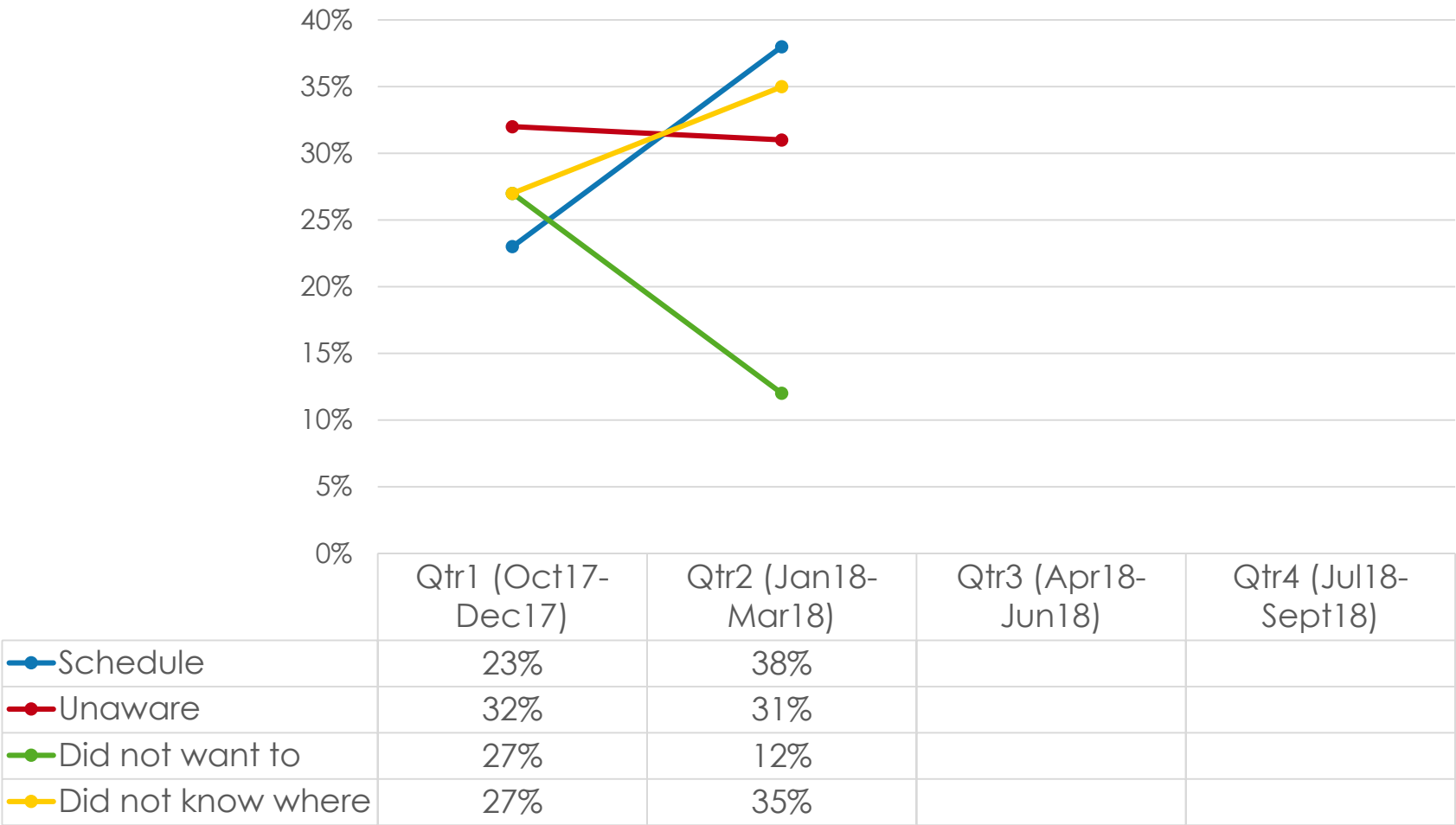


	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Travel guide/ brochure	25%	25%		
Travel agency	62%	64%		
Internet	36%	38%		
Family/ Friends	17%	15%		
Hotel staff	5%	6%		
Print	2%	2%		

# SATISFACTION- CULTURAL ACTIVITY/EVENTS

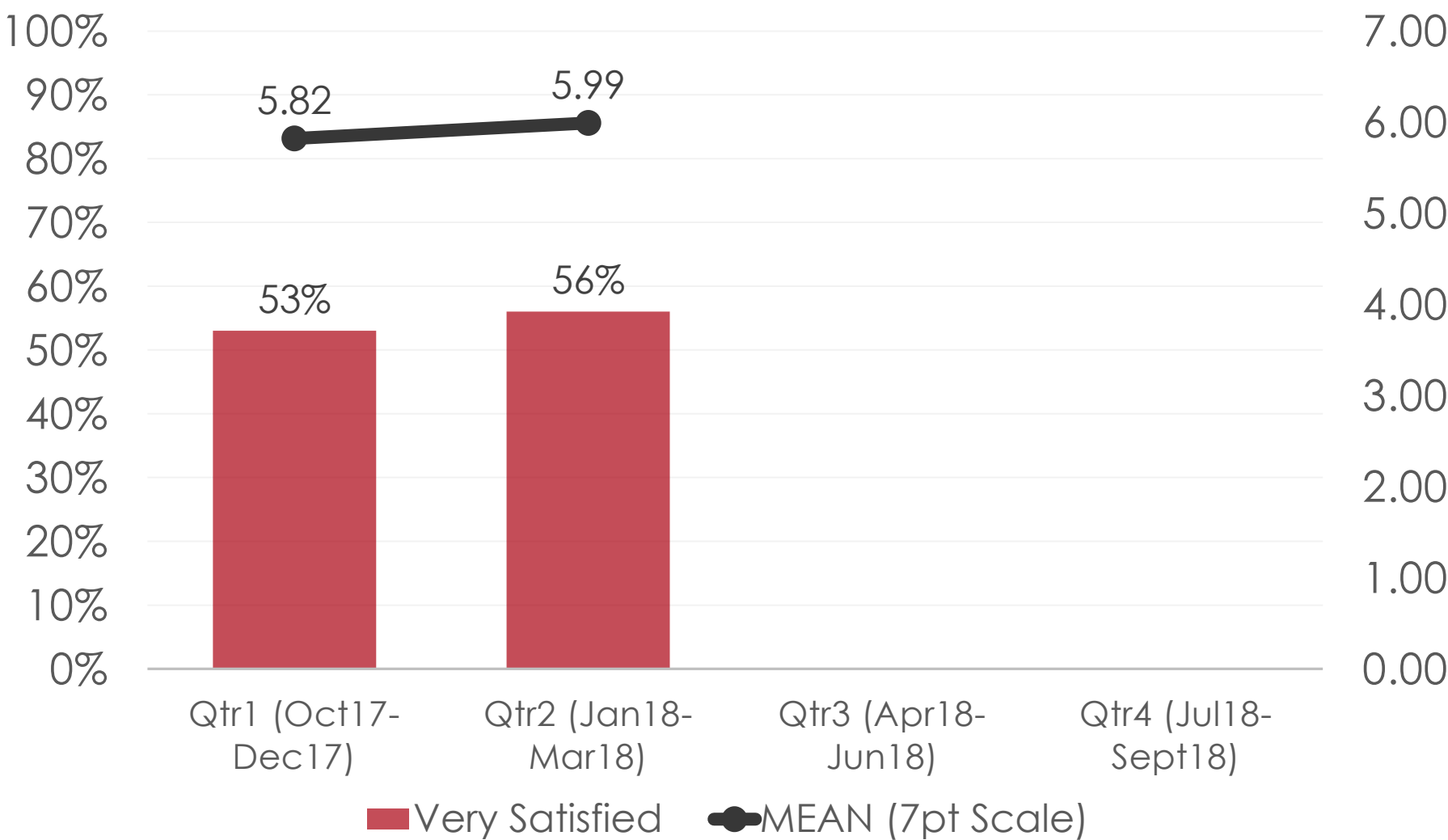


# OBSTACLES- CULTURAL ACTIVITY/EVENTS

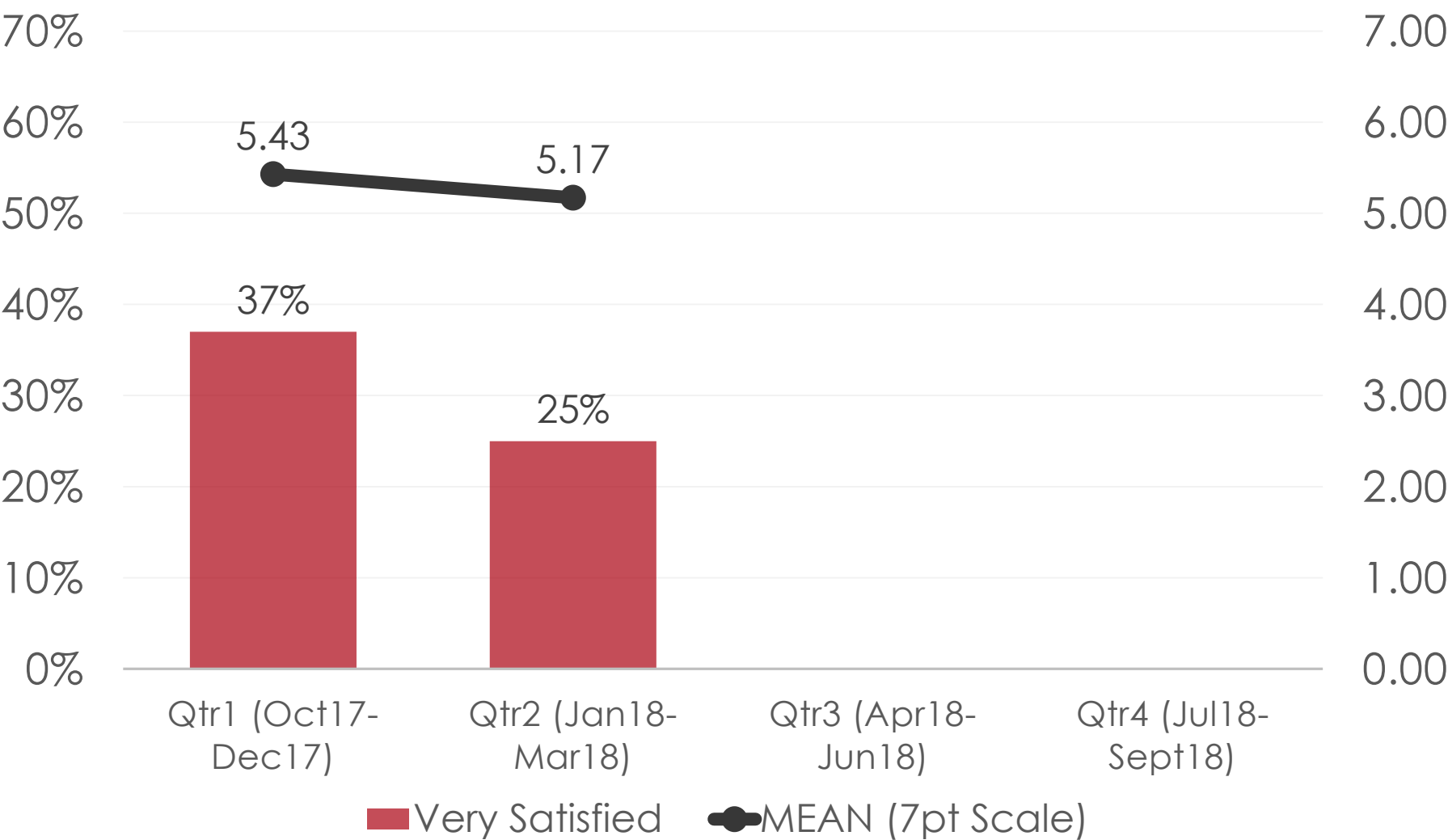


# WEDDING SATISFACTION

# Wedding Facility

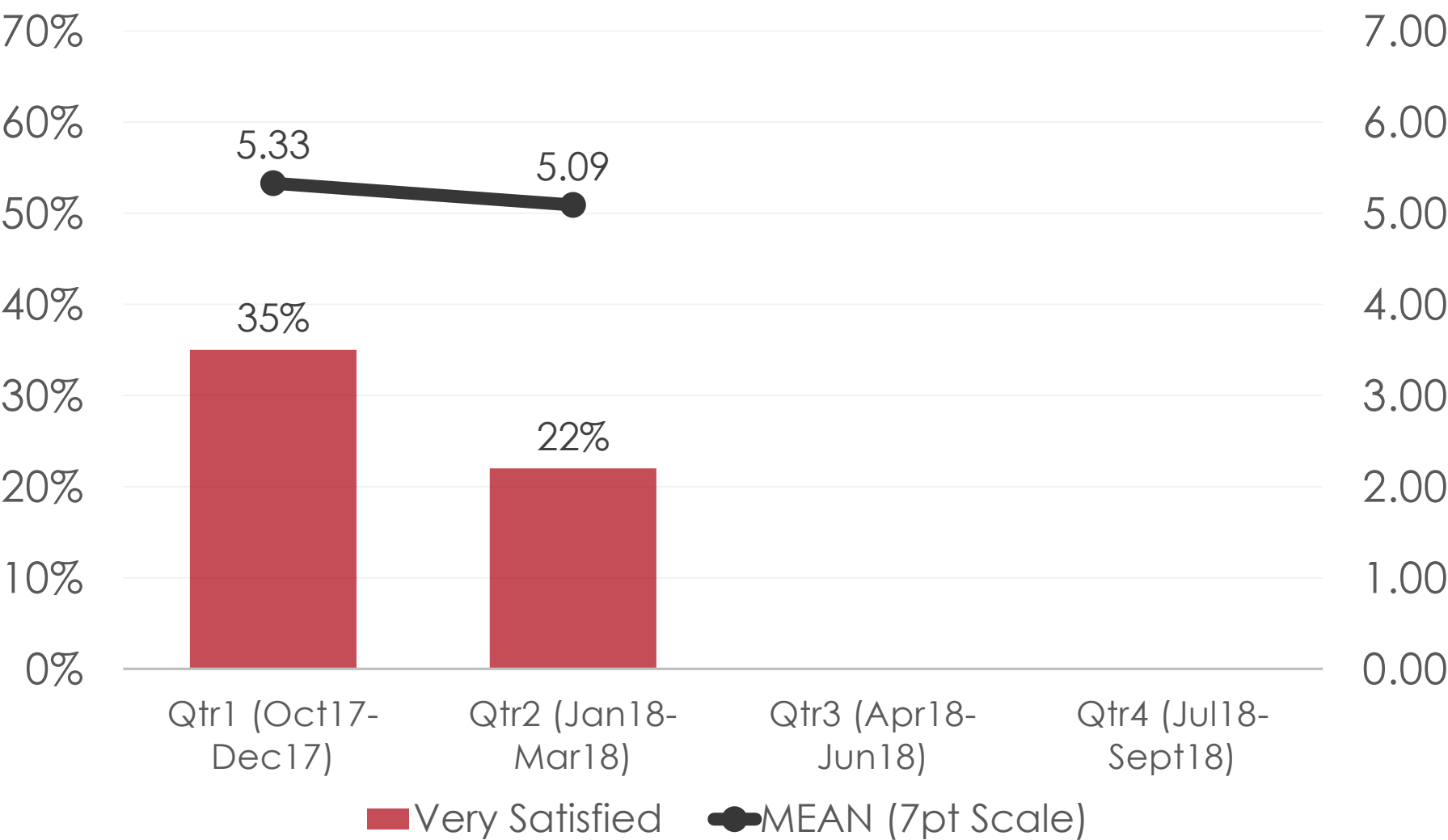


# Wedding Facility Staff

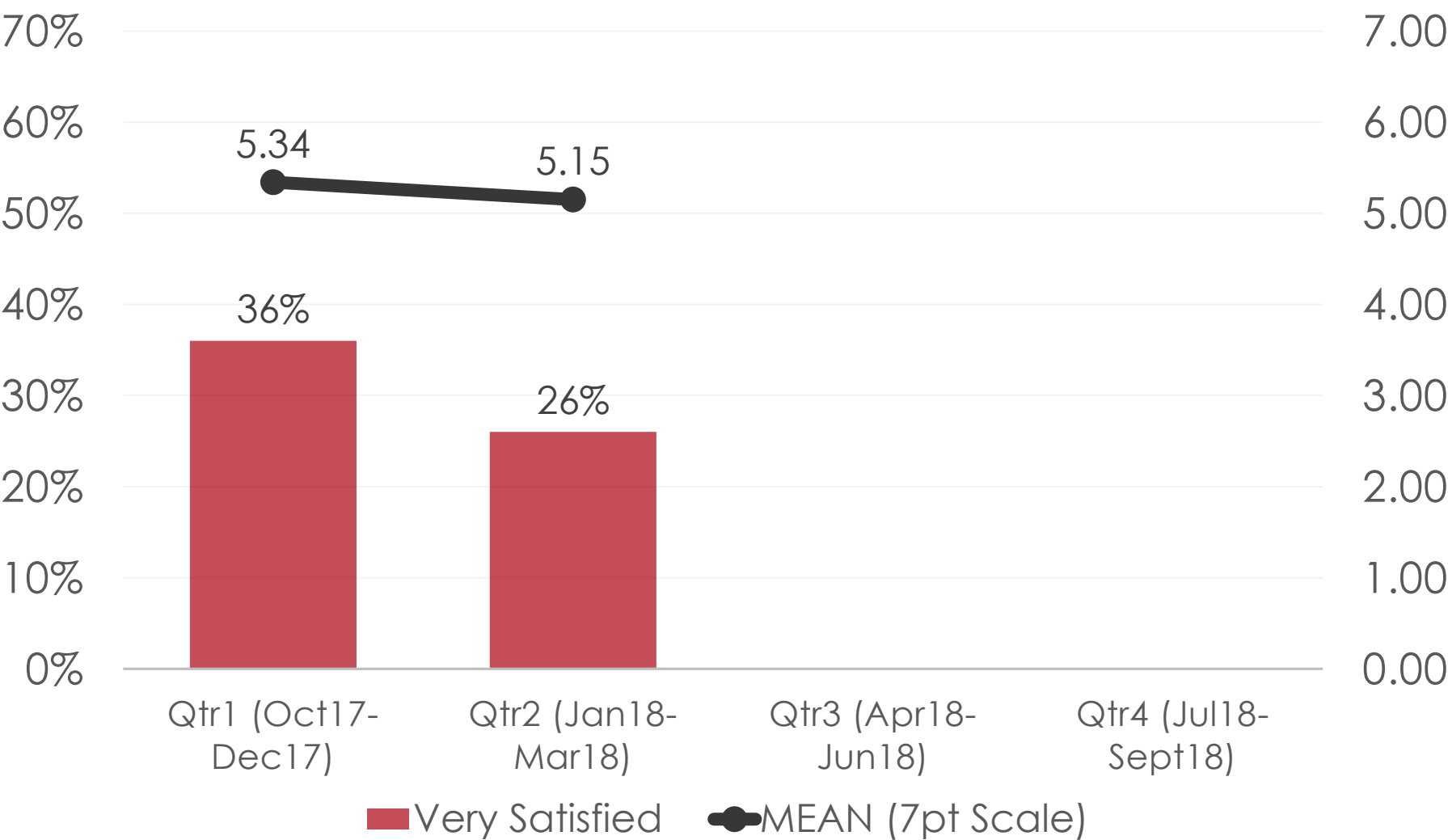




# Wedding Services



# 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 Qtr and Overall 1-2 Qtr 2017			
	1st Qtr	2nd Qtr	Combined 1-2 Qtr 2017
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks			
Ease of getting around			
Safety walking around at night			
Quality of daytime tours	1		
Variety of daytime tours			1
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping			
Variety of shopping			
Price of things on Guam		2	
Quality of hotel accommodations			3
Quality/cleanliness of air, sky	2		
Quality/cleanliness of parks			
Quality of landscape in Tumon			
Quality of landscape in Guam		1	2
Quality of ground handler			
Quality/cleanliness of transportation vehicles			
% of Per Person On Island Expenditures Accounted For	57.5%	37.7%	50.3%

# Drivers of Overall Satisfaction

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by two significant factors in the 2nd Quarter 2018 Period. By rank order they are:
  - **Quality of landscape in Guam, and**
  - **Price of things in Guam.**
- With these two factors the overall  $r^2$  is .377, meaning that **37.7% of overall satisfaction is accounted for by these factors.**

# Drivers – On-Isle Expenditures

Comparison of Drivers of Per Person On Isle Expenditure, 1st,2nd Qtr and Overall 1-2 Qtr 2018			
	1st Qtr	2nd Qtr	Combined 1-2 Qtr 2018
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks			
Ease of getting around		1	
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%	2.8%	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 one significant factor in the 2nd Quarter FY2018 period. It is:
  - **Ease of getting around at night.**
- With this factor the overall  $r^2$  is .028, meaning that **2.8% of overall per person on-island expenditure is accounted for by this factor.**