Guam Visitors Bureau

Taiwan Visitor Tracker Exit Profile & Market Segmentation Report FY2018

QTR.3 (APR-JUN 2018)

Prepared by: Anthology Research

Information contained herein is the property of the Guam Visitors Bureau. The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.









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 **158** 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 **158** 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

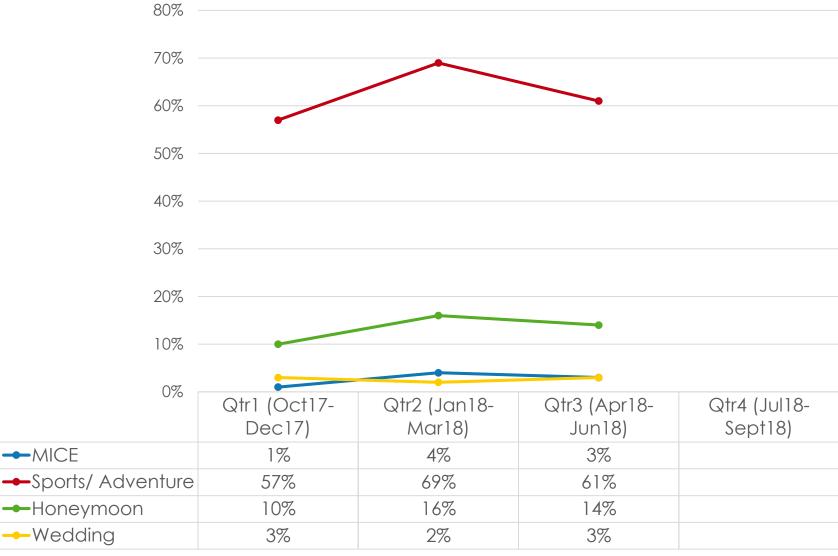
- To monitor the effectiveness of the Taiwan seasonal campaigns in attracting Taiwan visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Taiwan marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

Key Highlighted Segments

The specific objectives were:

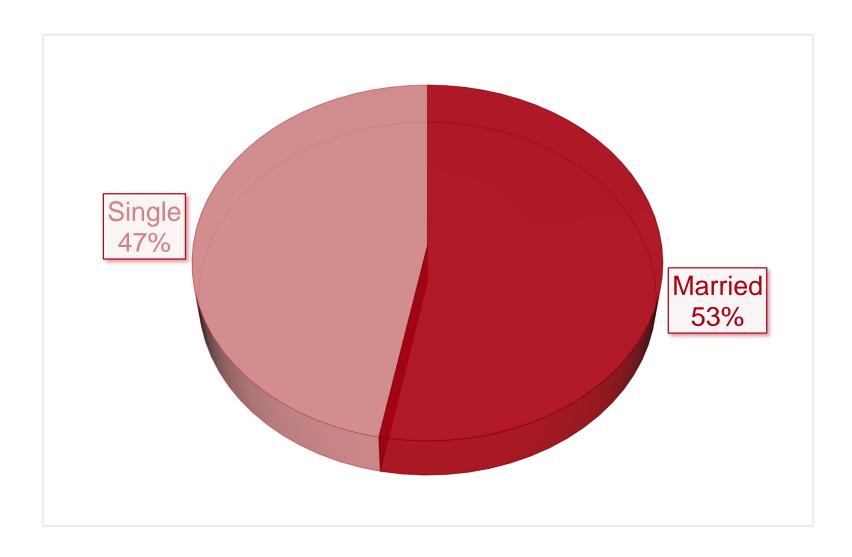
- To determine the relative size and expenditure behavior of the following market segments:
 - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)
 - Sports/ Adventure Traveler (Q5A Organized sporting activity/ Scuba/ Water sports, Q18 Skydiving, Q19 Scuba, snorkel, windsurf)
 - Wedding (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

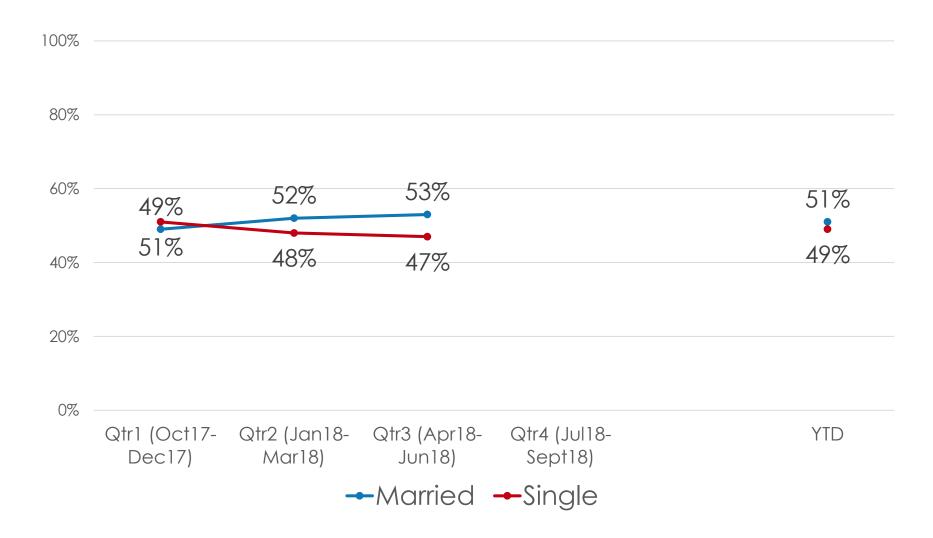


SECTION 1 PROFILE OF RESPONDENTS

Marital Status



Marital status - FY2018 Tracking





Marital status – Key Segments

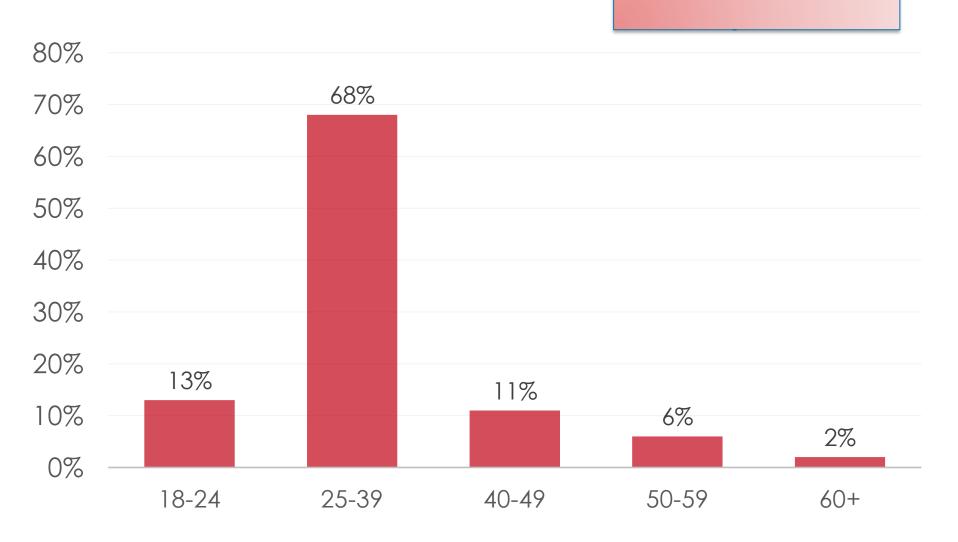
GVB EXIT SURVEY QE MARITAL STATUS

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOO N
		873		78		53
QE	Married	53%	40%	51%	75%	100%
	Single	47%	60%	49%	25%	
	Total	158	5	96	4	22

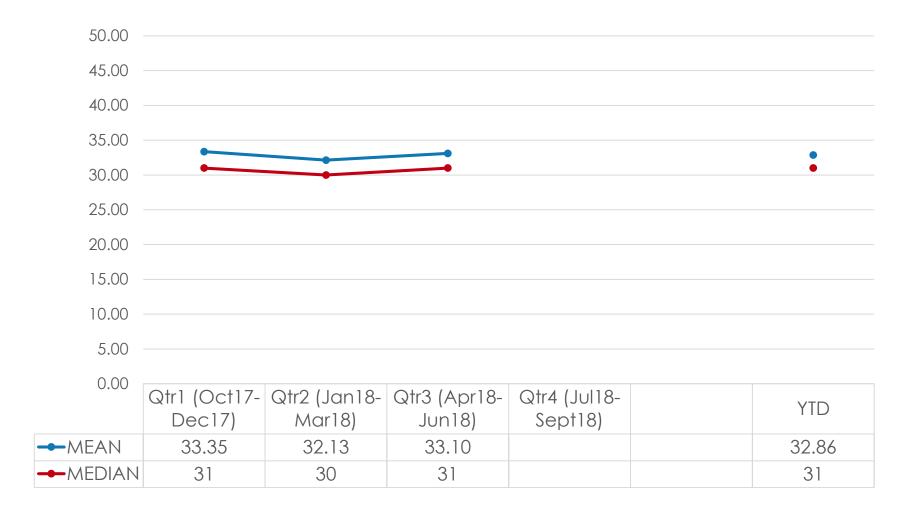
Prepared by Anthology Research

Age

MEAN = 33.10 MEDIAN = 31



Age - FY2018 Tracking



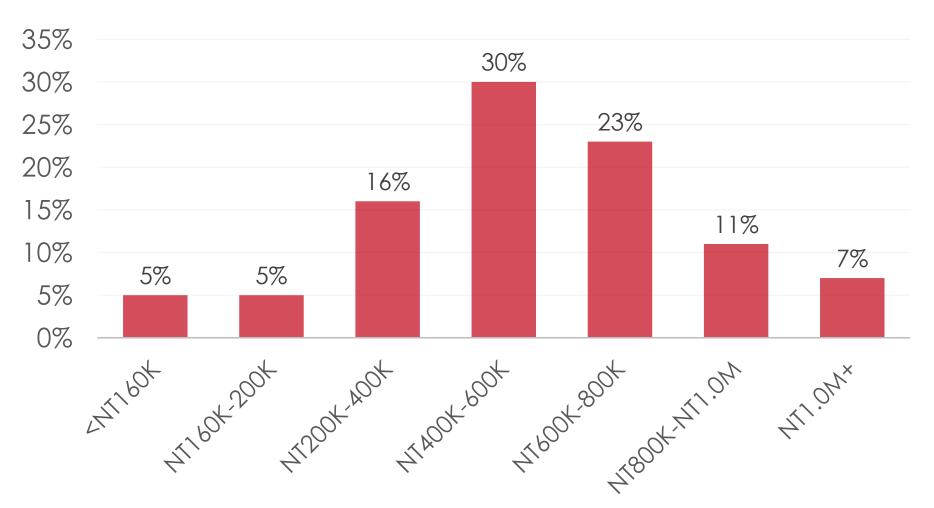
Age – Key Segments

GVB EXIT SURVEY AGE

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOO N
		353	. 8	878		- TA
SD	18-24	13%		16%		5%
	25-39	68%	100%	69%	100%	86%
	40-49	11%		7%		9%
	50-59	6%		7%		540,45
	60+	2%		1%		
	Total	158	5	96	4	22
SD	Mean	33.10	33.80	32.11	31.00	31.05
	Median	31	36	30	30	31

Prepared by Anthology Research

Annual Household Income



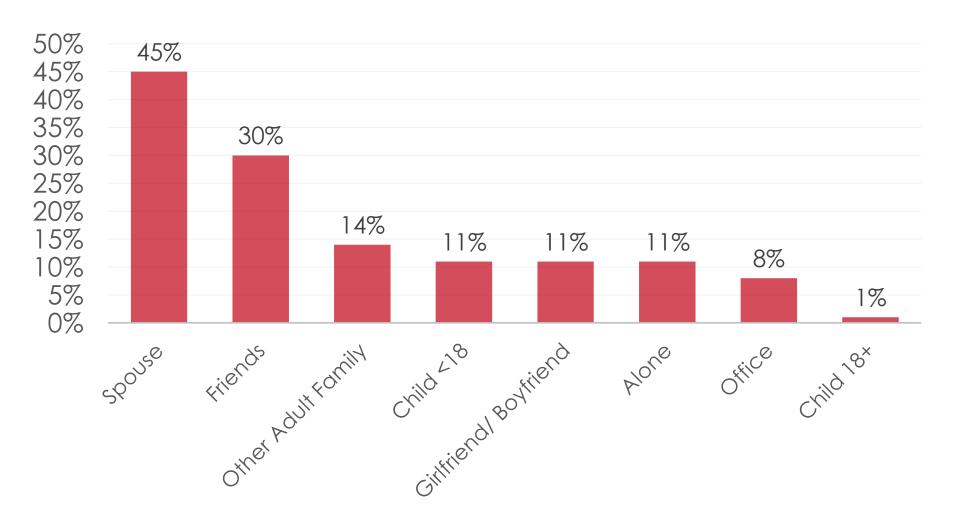
Annual Household Income – Key Segments

GVB EXIT SURVEY Q26 Household income:

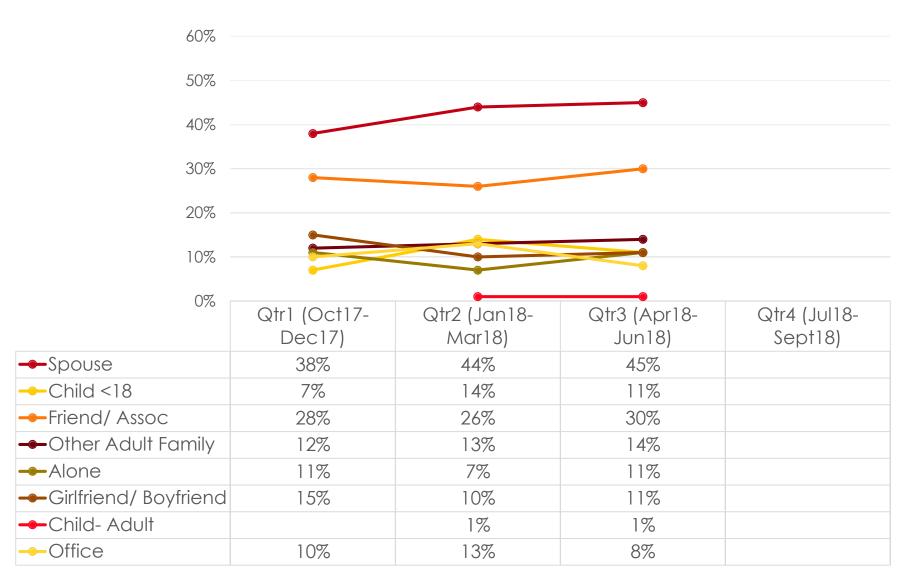
		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOO N
		25	7.5	353	-	25
Q26	Less than NT160K	5%		5%		5%
	NT160K-NT200K	5%		1%	33%	
	NT200K-NT400K	16%		12%		38%
	NT400K-NT600K	30%	40%	33%	67%	33%
	NT600K-NT800K	23%	20%	23%		24%
	NT800K-NT1.0M	11%		14%		
	NT1.0M+	7%	40%	8%		
	No Income	4%		4%		
	Total	151	5	92	3	21

Prepared by Anthology Research

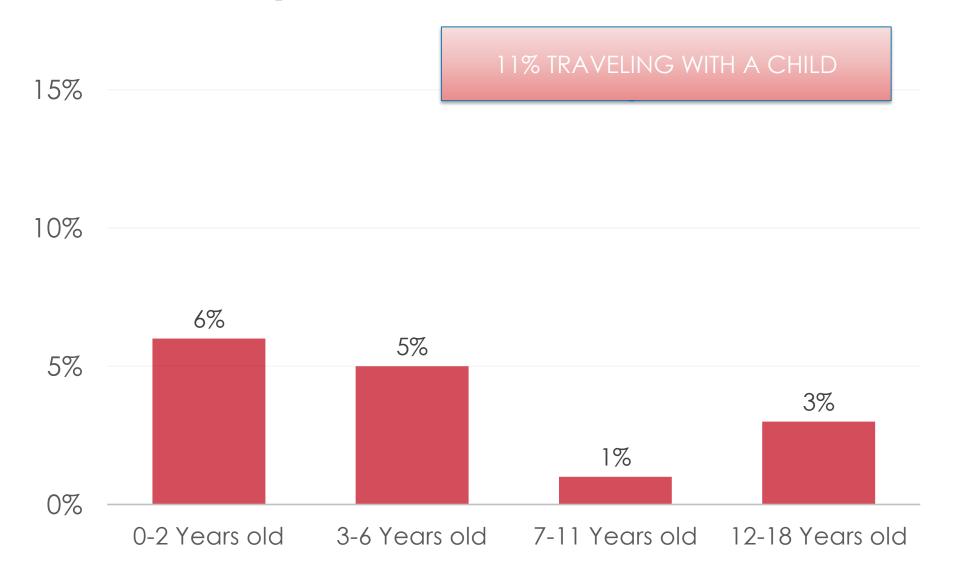
Travel Party



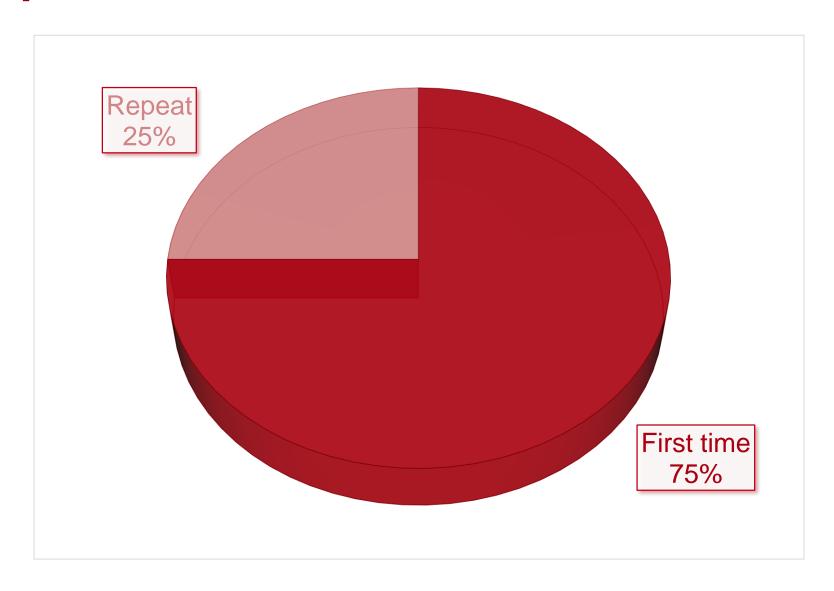
Travel Party



Travel Party - Children

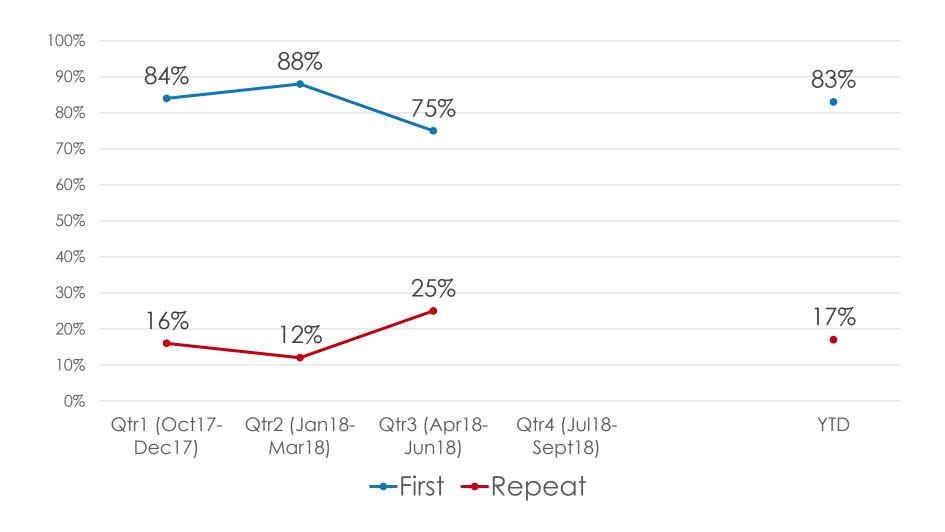


Trips to Guam





Trips to Guam – FY2018 Tracking



Trips to Guam – Key Segments

GVB EXIT SURVEY

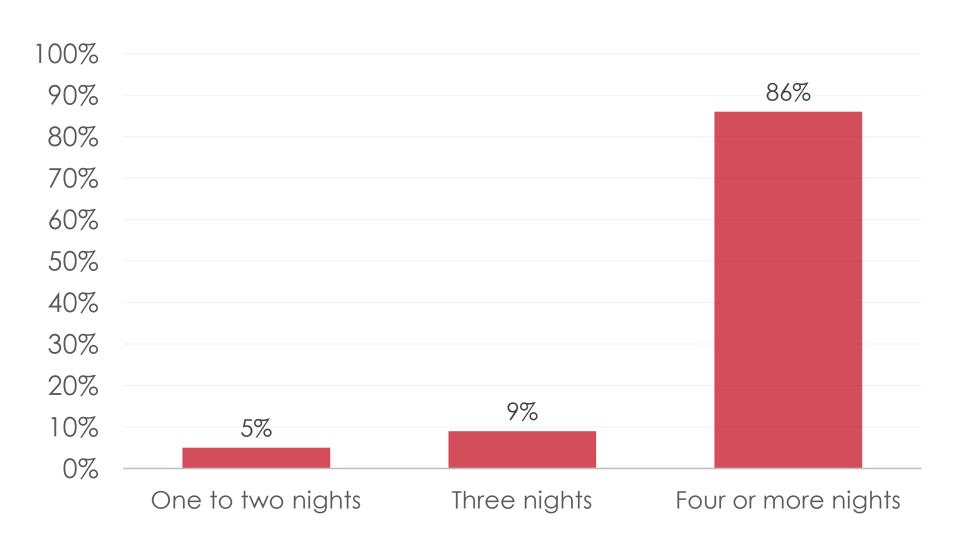
Q3 Including this trip, how many times have you visited Guam?

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOO N
		373		275	- 5	- 12
Q3	1 st Time	75%	80%	82%	100%	100%
	Repeat	25%	20%	18%		
	Total	158	5	96	4	22
Q3A	Mean	1.66	1.20	1.49	1.00	1.00
	Median	1	1	1	1	1

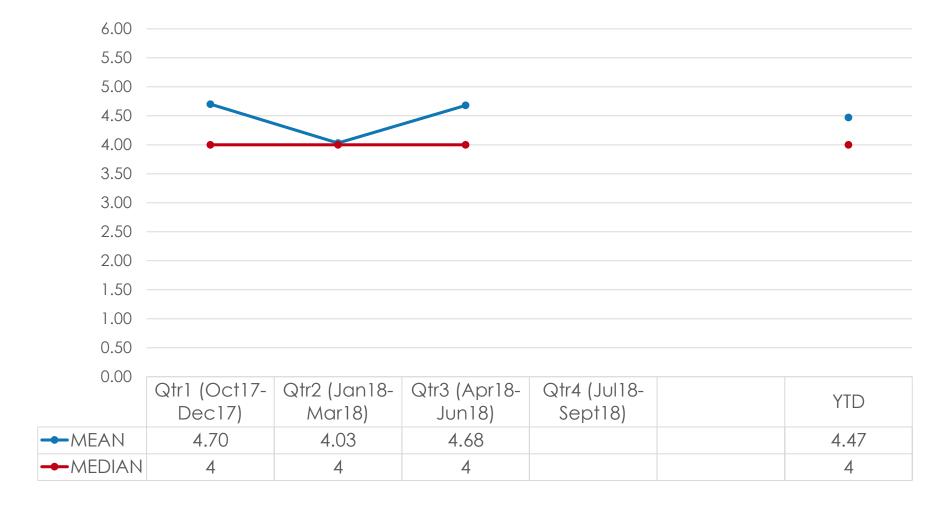
Prepared by Anthology Research

Length of Stay

MEAN NUMBER OF NIGHTS = 4.68 MEDIAN NUMBER OF NIGHTS = 4



Length of Stay – FY2018 Tracking



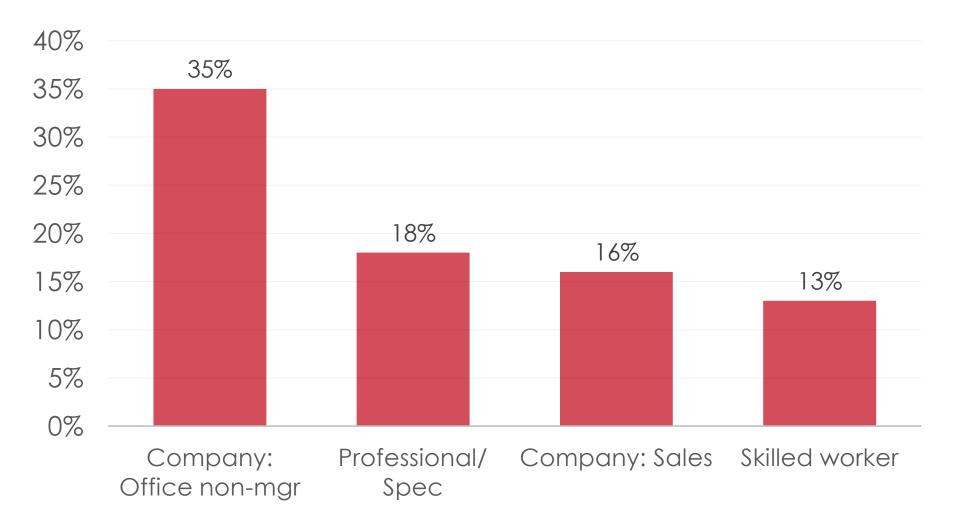
Length of Stay – Key Segments

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

		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOO N
		159	3763		37.5	25
SA	1-2	5%				
	3	9%		6%	25%	5%
	4+	86%	100%	94%	75%	95%
	Total	158	5	96	4	22
SA	Mean	4.68	4.20	4.86	4.25	4.82
	Median	4	4	4	5	5

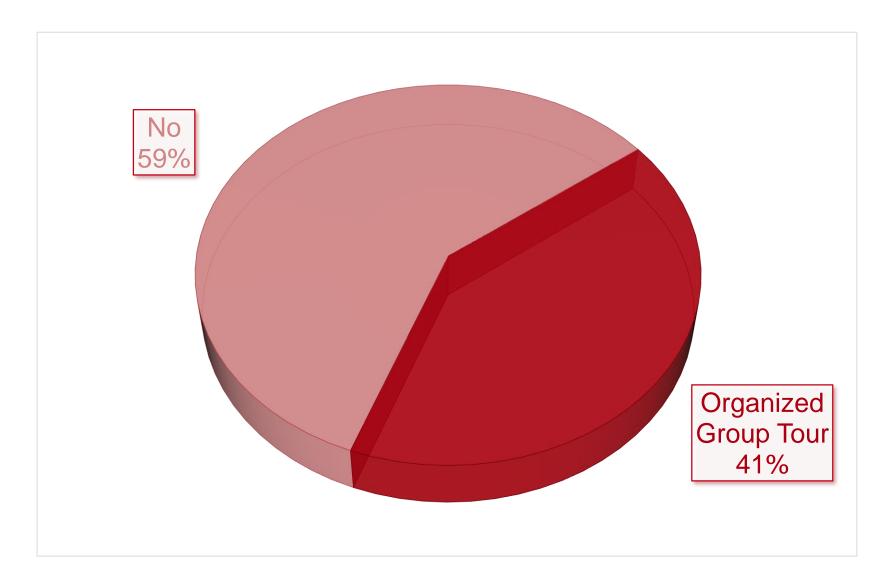
Prepared by Anthology Research

Occupation – Top Responses (10%+)

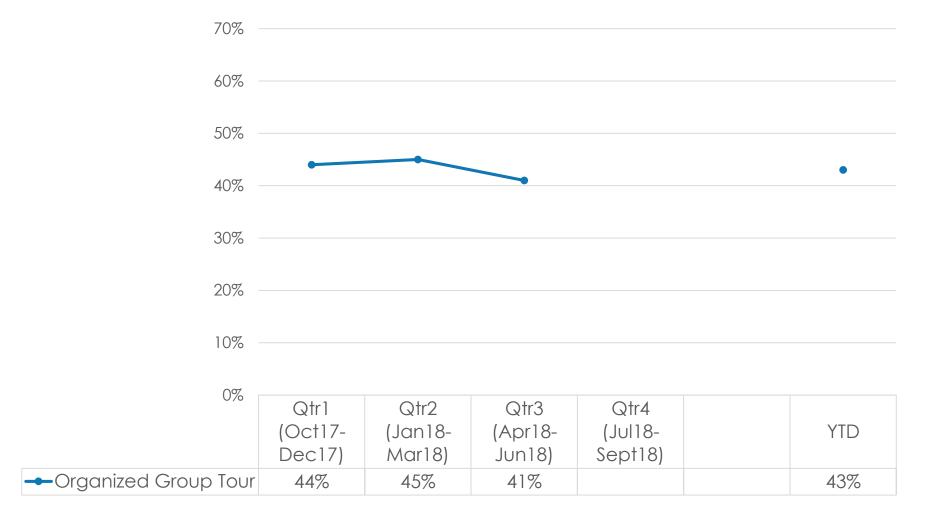


SECTION 2 TRAVEL PLANNING

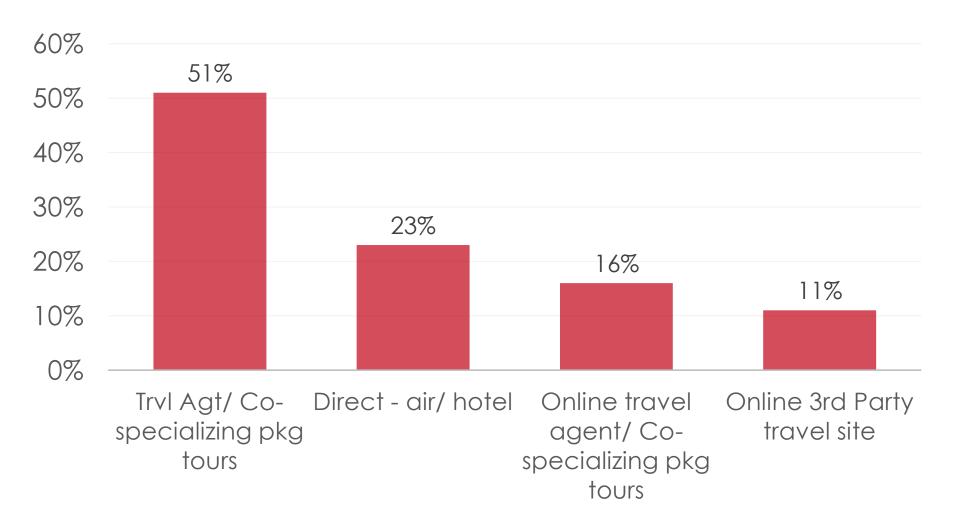
Organized Group Tour



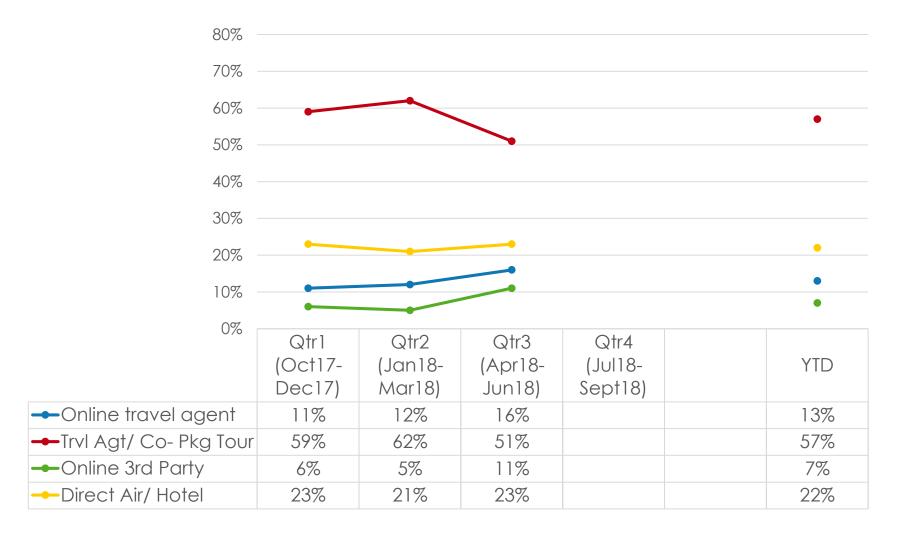
Organized Group Tour



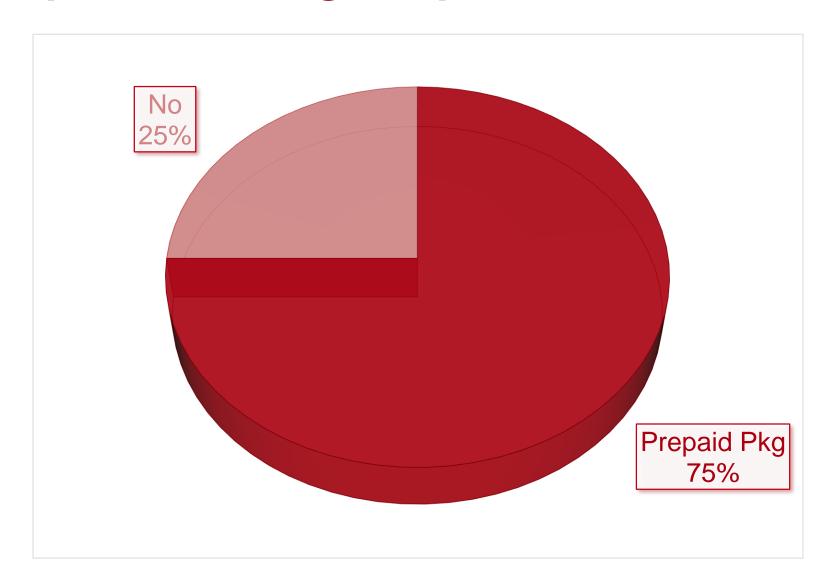
Travel Arrangements - Sources



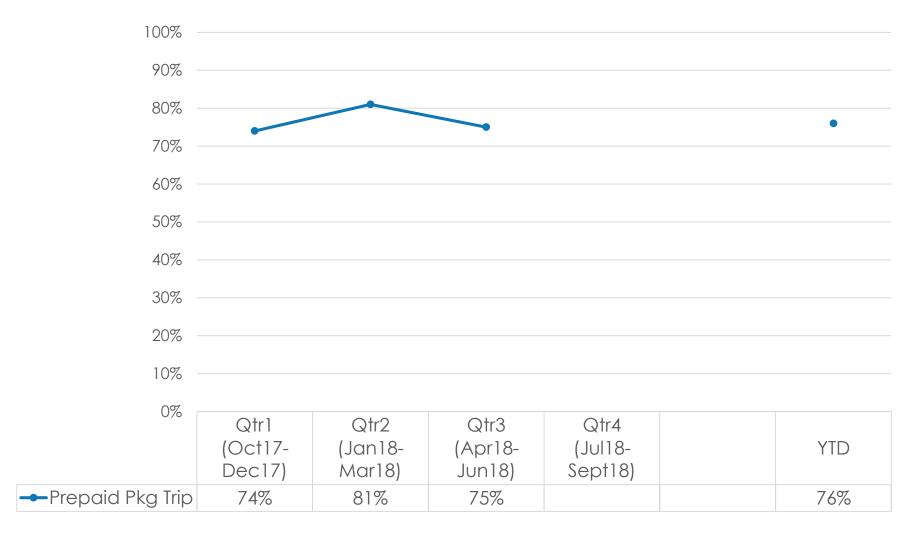
Travel Arrangements - Sources



Prepaid Package Trip



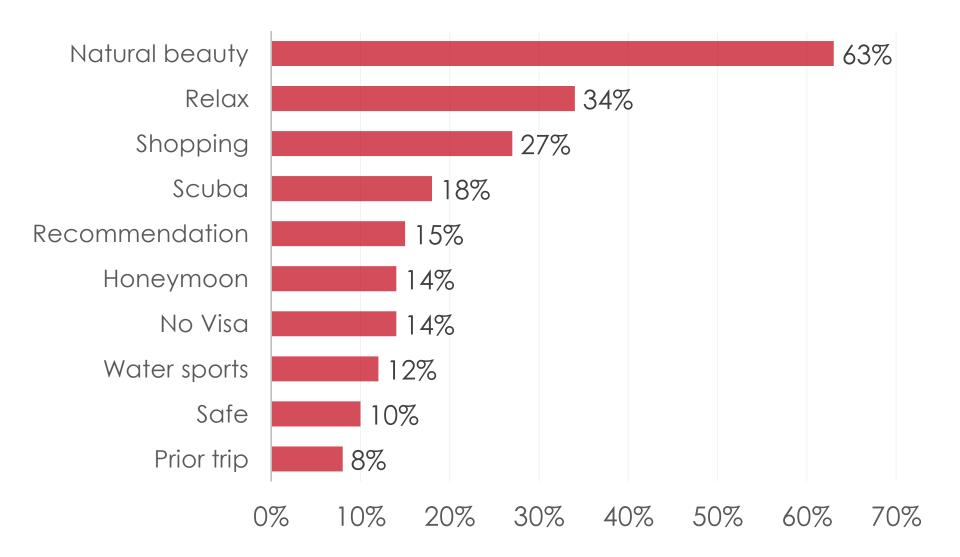
Prepaid Package Trip



Accommodations (Top Responses/ 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	HONEYMOO N
		15	273		25-33	× 5
Q5A	Beautiful seas, beaches, tropical climate	63%	60%	61%	50%	73%
	Just to relax	34%	20%	38%		18%
	Shopping	27%	20%	27%		41%
	Scuba diving	18%		29%		32%
	Recommendation of friend/ relative/ travel agency	15%	20%	11%	75%	
	Honeymoon	14%		16%		100%
	No Visa required	14%		14%		9%
	Water sports (snorkeling, windsurfing, parasailing)	12%		20%		
	It is a safe place to spend a vacation	10%		10%		5%
	A previous visit	8%		5%		
	Pleasure/ vacation	6%	20%	8%		
	Short travel time (not too far from home)	4%		4%		5%
	Company/ business trip	4%		2%		
	Price of the tour package	3%		1%		
	Incentive trip	3%	100%	5%		
	Adventure	3%		5%		5%
	Career certification/ testing	3%				
	To Get Married/ attend Wedding	3%			100%	
	To visit friends or relatives	2%		2%		
	Organized sporting activity/ event	2%	20%	3%		
	To golf	1%		1%		
	Total	157	5	96	4	22

Prepared by Anthology Research



SECTION 3 EXPENDITURES

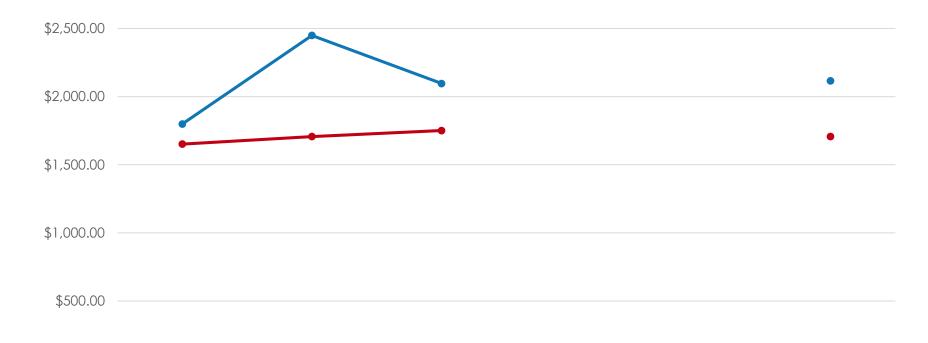
Prepaid Expenditures

EXCHANGE RATE TWD 29.67=\$1

 \$2,096.55 = overall mean average prepaid expense (for entire travel party size) by respondent

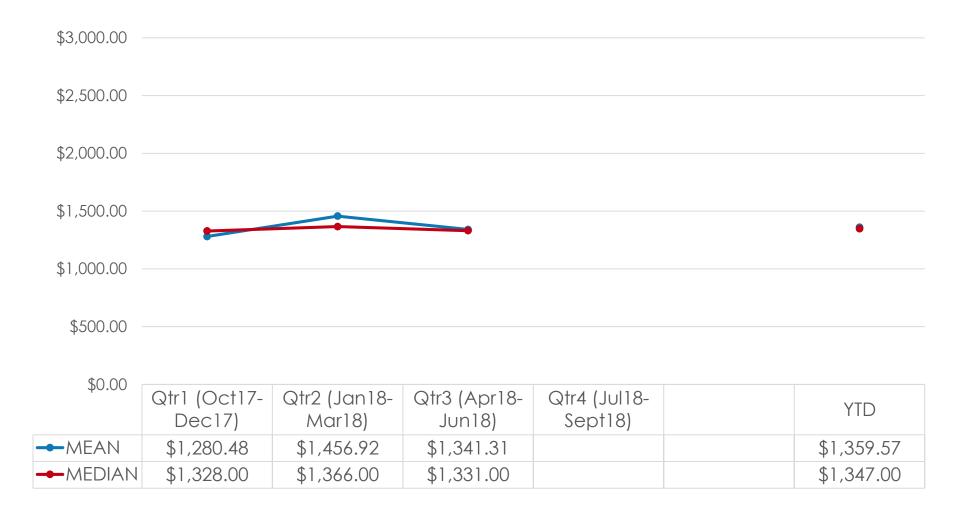
 \$1,341.31 = overall mean average <u>per person</u> prepaid expenditures

Prepaid Entire Travel Party – FY2018 Tracking



\$0.00					
φ0.00	Qtr1 (Oct17-	Qtr2 (Jan18-	Qtr3 (Apr18-	Qtr4 (Jul18-	YTD
	Dec17)	Mar18)	Jun18)	Sept18)	IID
→ MEAN	\$1,798.89	\$2,449.25	\$2,096.55		\$2,115.60
→ MEDIAN	\$1,652.00	\$1,707.00	\$1,751.00		\$1,707.00

Prepaid Per Person-FY2018 Tracking



Prepaid Per Person– Key Segments

GVB EXIT SURVEY Q10A PREPAID - PER PERSON:

		TOTAL	MICE	SPORT/ ADV	WEDDING	HONEYMOO N
			87	9.73		78
PREPAID PP	Mean	\$1,341.31	\$1,444.56	\$1,412.06	\$940.91	\$1,579.50
	Median	\$1,331	\$1,348	\$1,348	\$997	\$1,685

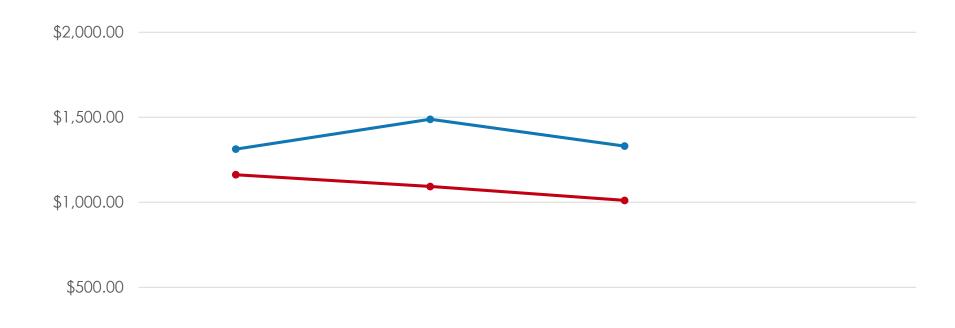
Prepared by Anthology Research

Prepaid Expenses by Category – MEAN Entire Travel Party



Prepaid- FY2018 Tracking

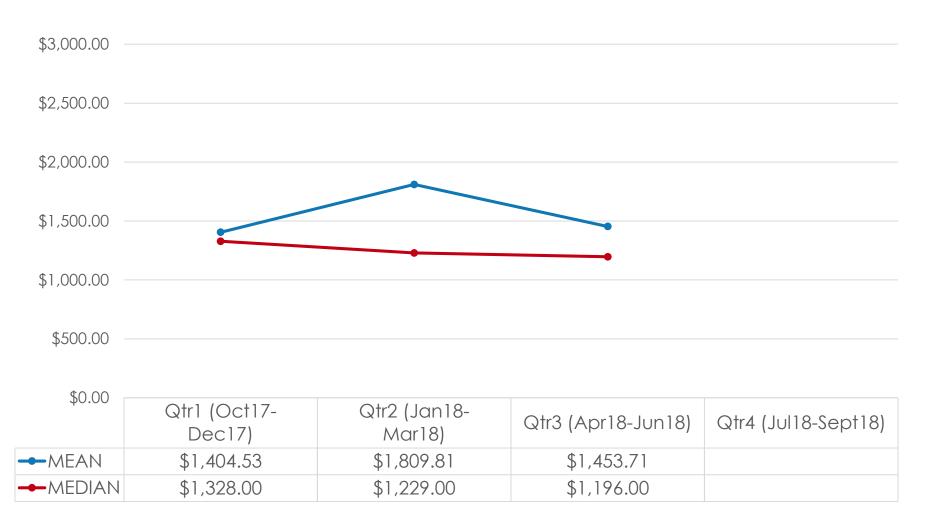
Airfare & Accommodation Packages



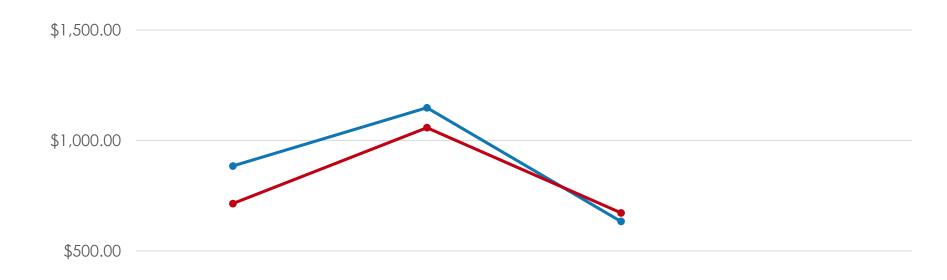
\$0.00				
φ0.00	Qtr1 (Oct17-	Qtr2 (Jan18-	Qtr3 (Apr18-	Qtr4 (Jul18-
	Dec17)	Mar18)	Jun18)	Sept18)
→ MEAN	\$1,312.74	\$1,488.27	\$1,330.74	
→ MEDIAN	\$1,162.00	\$1,093.00	\$1,011.00	

Prepaid- FY2018 Tracking

Airfare & Accommodation W/ Meal Packages



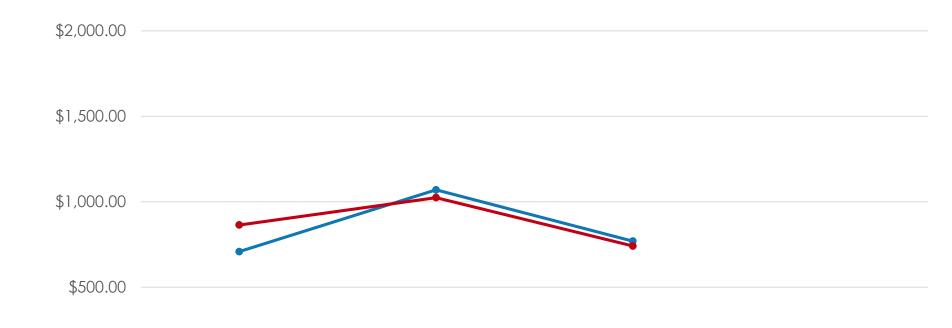
Prepaid- FY2018 Tracking Airfare Only



\$0.00				
ψ0.00	Qtr1 (Oct17- Dec17)	Qtr2 (Jan18- Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
→ MEAN	\$884.26	\$1,148.00	\$633.30	
→ MEDIAN	\$714.00	\$1,058.00	\$672.00	

Prepaid-FY2018 Tracking

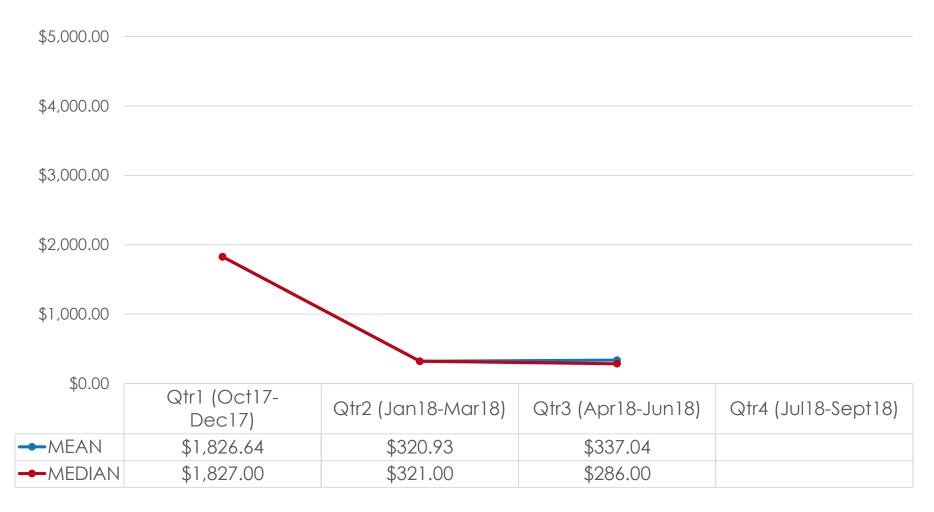
Accommodations Only



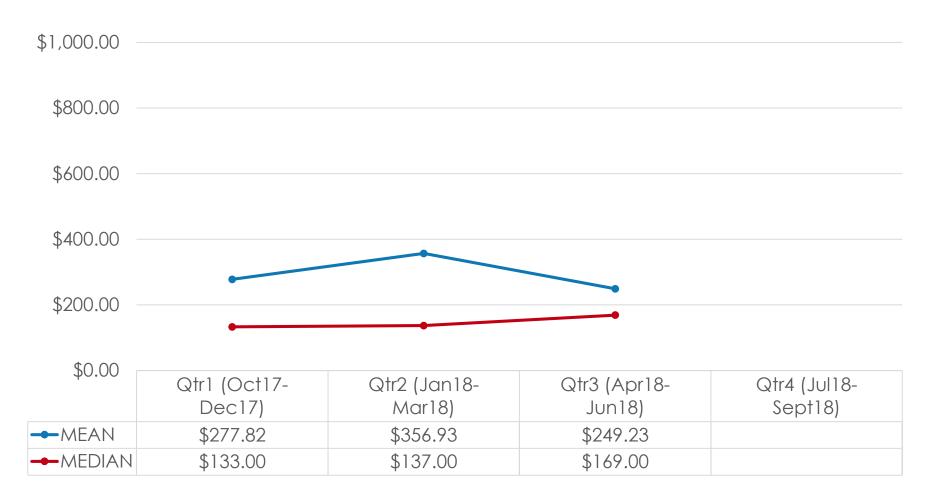
\$0.00				
ψ0.00	Qtr1 (Oct17- Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
→ MEAN	\$708.51	\$1,069.76	\$769.58	
→ MEDIAN	\$864.00	\$1,024.00	\$741.00	

Prepaid-FY2018 Tracking

Accommodations w/ Meal Only

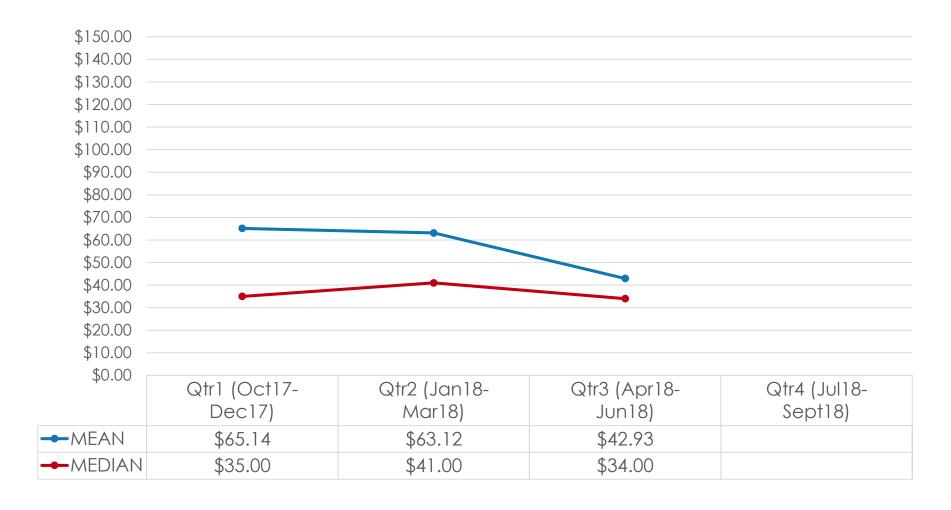


Prepaid – FY2018 Tracking Food & Beverage in Hotel

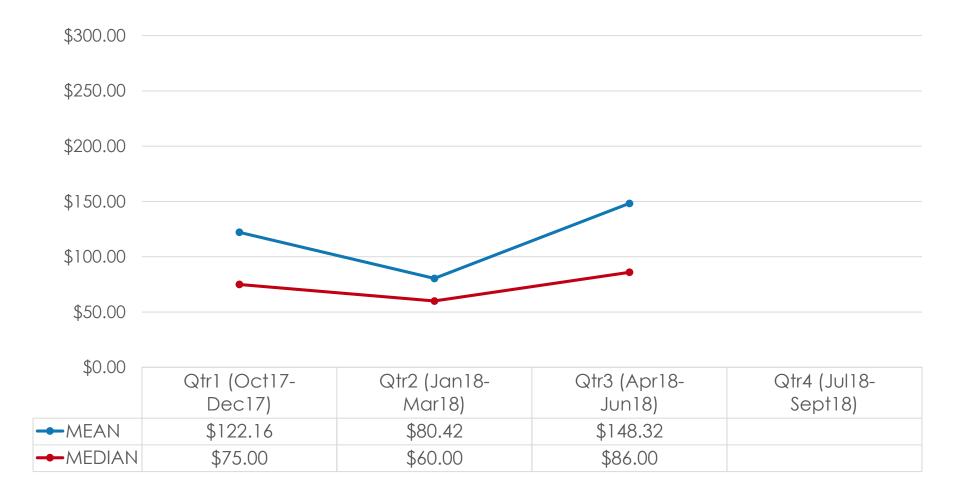


Prepaid-FY2018 Tracking

Ground Transportation - Taiwan

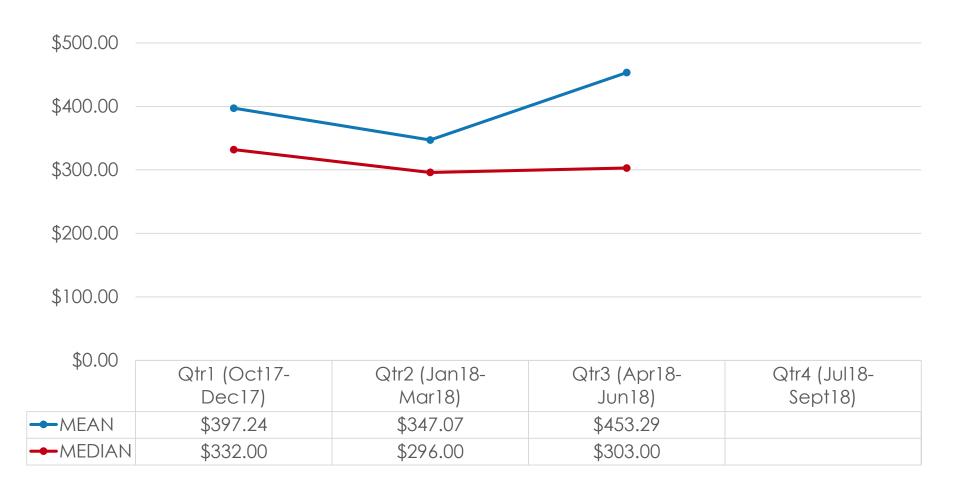


Prepaid - FY2018 Tracking Ground Transportation - Guam



Prepaid- FY2018 Tracking

Optional tours/ Activities

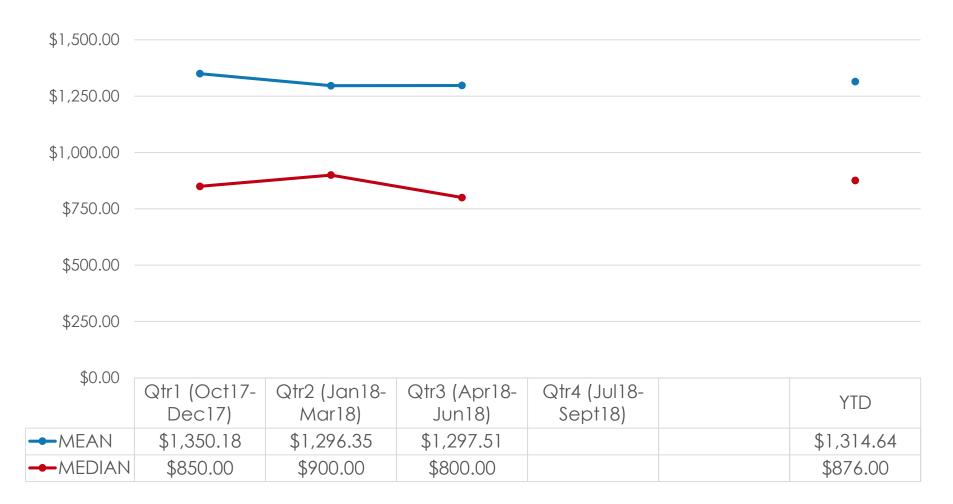


On-Island Expenditures

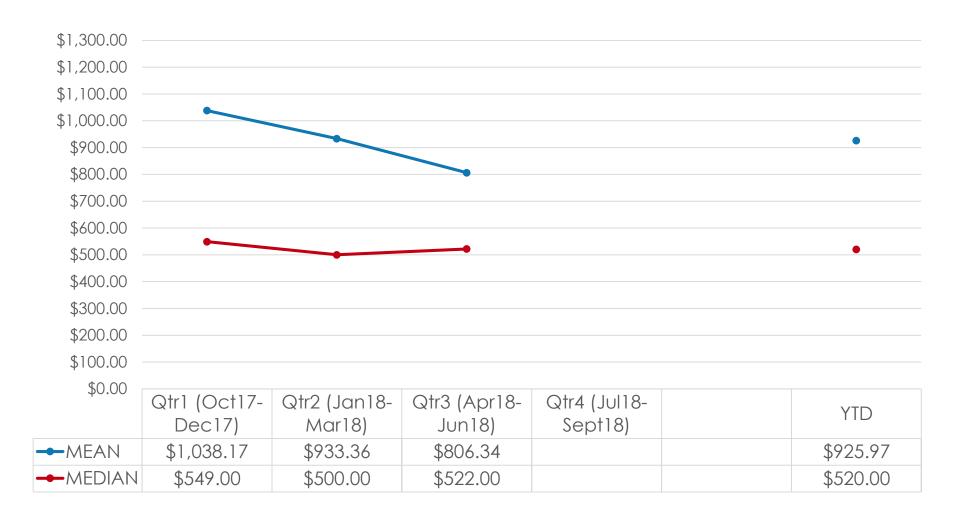
 \$1,297.51 = overall mean average on-island expense (for entire travel party size) by respondent

 \$806.34 = overall mean average <u>per person</u> on-island expenditures

On-Island Entire Travel Party – FY2018 Tracking



On-Island Per Person - FY2018 Tracking



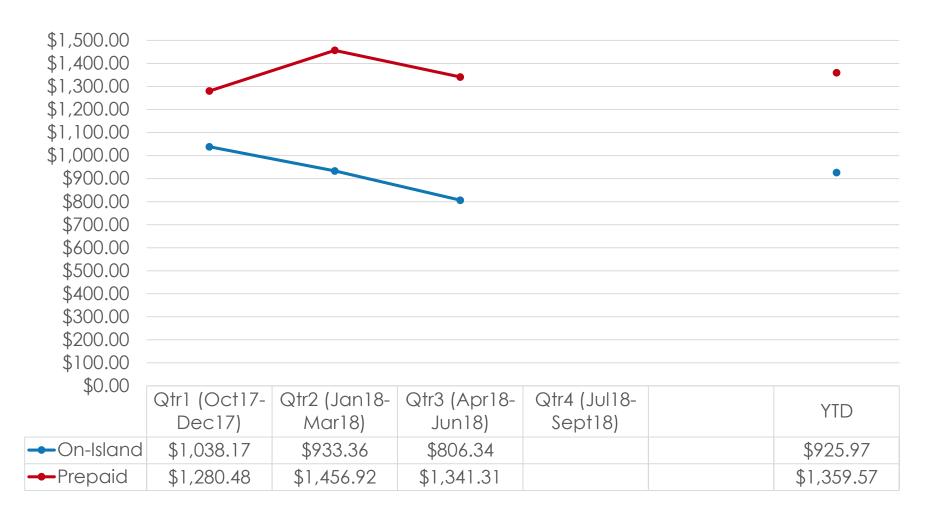
On-Island Per Person – Key Segments

GVB EXIT SURVEY Q11A ONISLE EXPENDITURE- PER PERSO

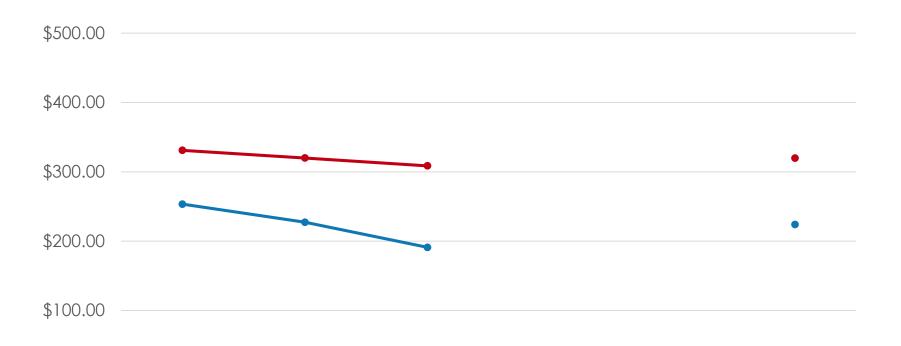
		TOTAL	MICE	SPORT/ADV	WEDDING	HONEYMOO N
		- 18	15	9	25	5
ONISLE PP	Mean	\$806.34	\$825.60	\$808.36	\$423.75	\$1,068.73
	Median	\$522	\$700	\$600	\$400	\$575

Prepared by Anthology Research

Per Person MEAN expenditures – FY2018 Tracking On-Island/ Prepaid



On-Island Per Day Spending – FY2018 Tracking MEAN



\$0.00					
φ0.00	Qtr1 (Oct17-	Qtr2 (Jan18-	Qtr3 (Apr18-	Qtr4 (Jul18-	YTD
	Dec17)	Mar18)	Jun18)	Sept18)	ווט
→ Per Person	\$253.30	\$227.26	\$191.07		\$223.88
→ Travel Party	\$330.95	\$319.89	\$308.58		\$319.81

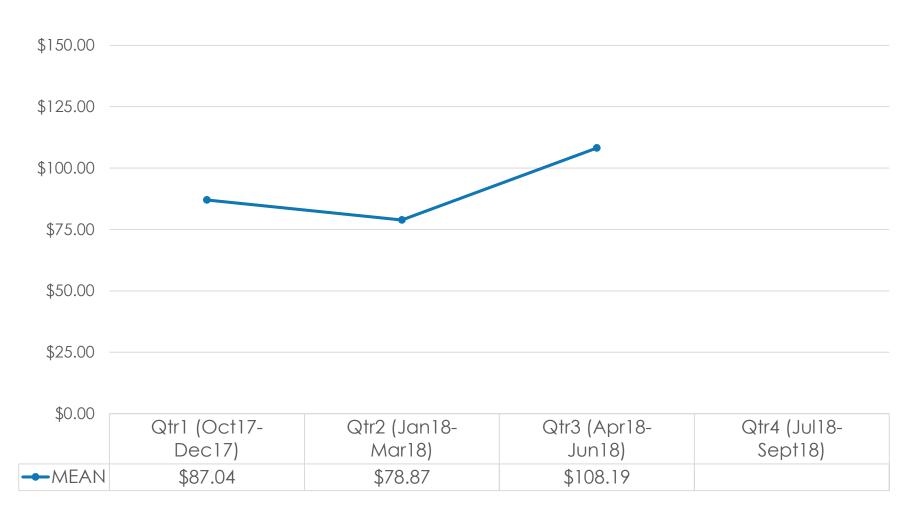
On-Island Expenses by Category – MEAN Entire Travel Party



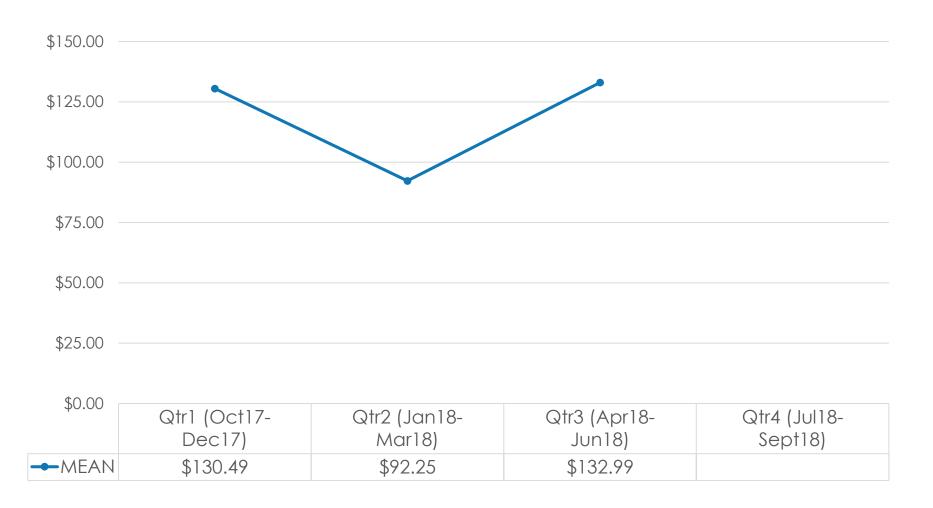
On-Island – FY2018 Tracking Food & Beverage - Hotel



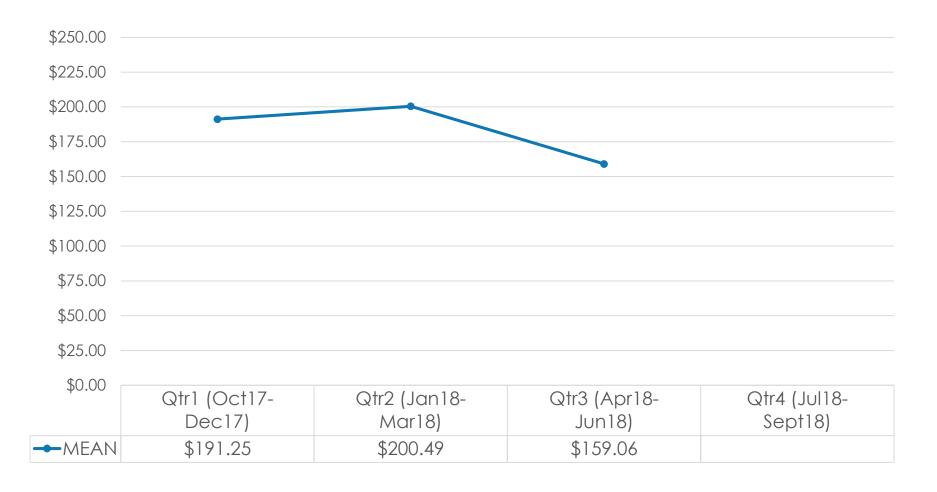
Food & Beverage – Fast Food/ Convenience Store



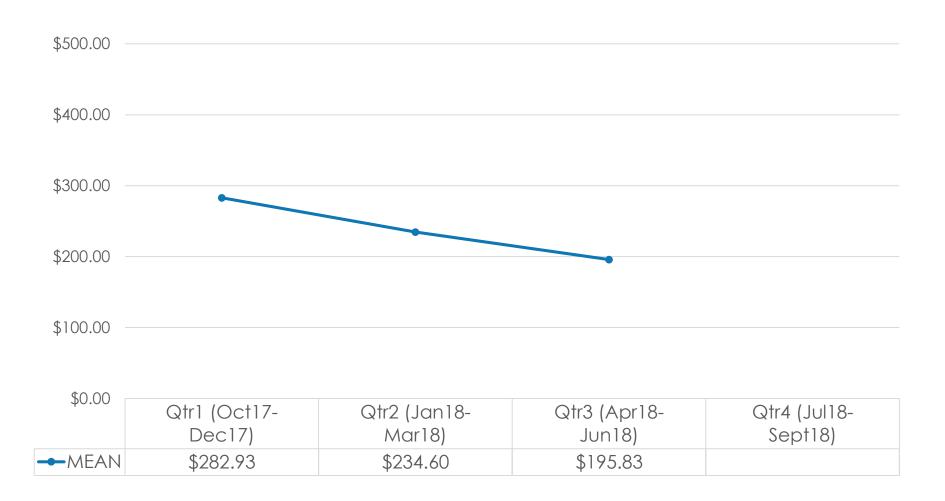
Food & Beverage - Restaurant/ Drinking Est Outside Hotel



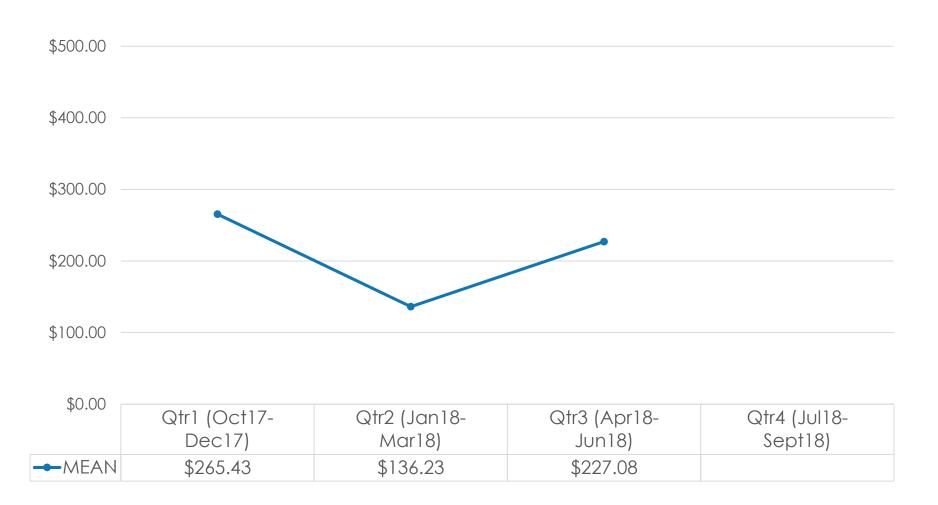
Optional tour/ Activities



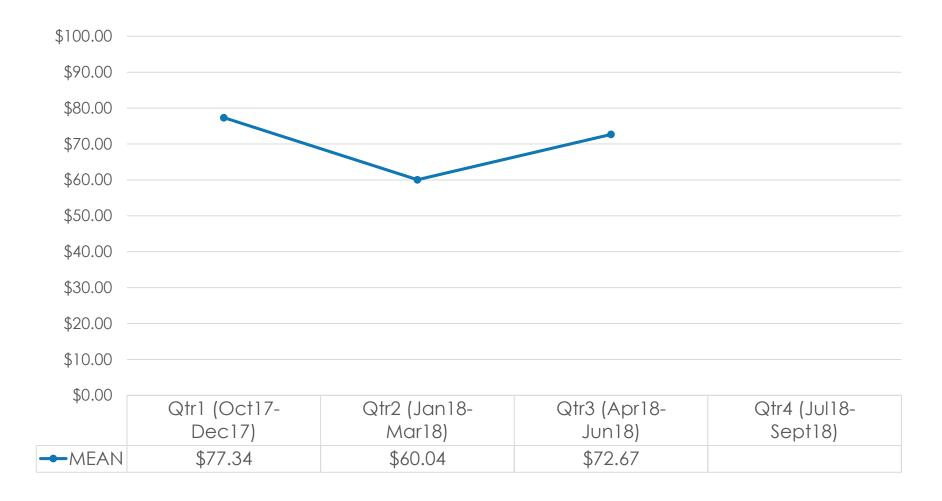
Gift/ Souvenir - Self/ Companion



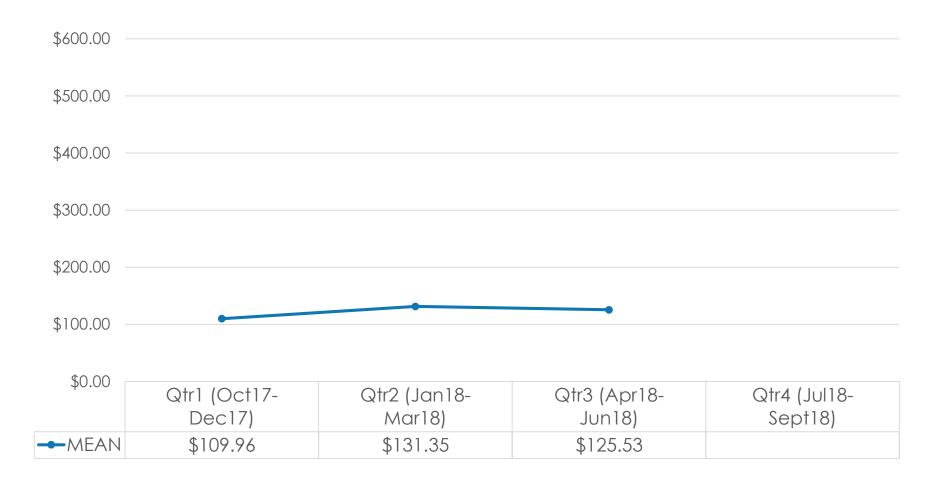
Gift/ Souvenir – Friends/ Family



Local Transportation



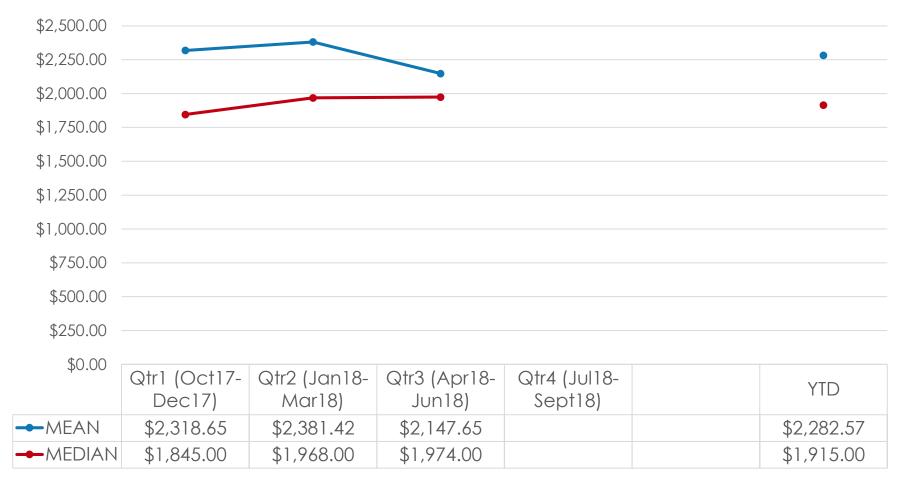
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

• \$2,147.65 = overall mean average prepaid expense by respondent/ Per Person

TOTAL Per Person Expenditures – FY2018 Tracking



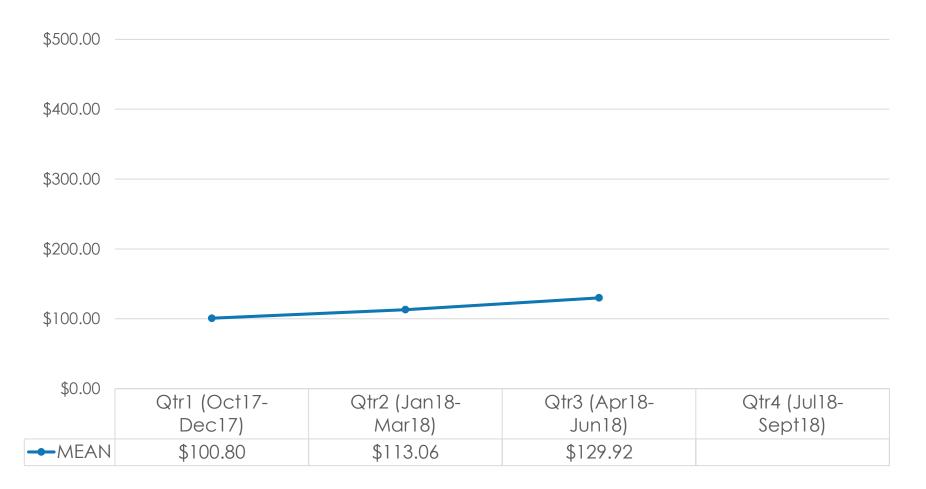
TOTAL Per Person Expenditures – Key Segments

GVB EXIT SURVEY TOTAL PER PERSON SPENDING:

		TOTAL	MICE	SPORT/ ADV	WEDDING	HONEYMOO
		15	373	≅ 8		58
TOTAL PP	Mean	\$2,147.65	\$2,270.16	\$2,220.42	\$1,364.66	\$2,648.22
	Median	\$1,974	\$1,848	\$2,021	\$1,520	\$2,157

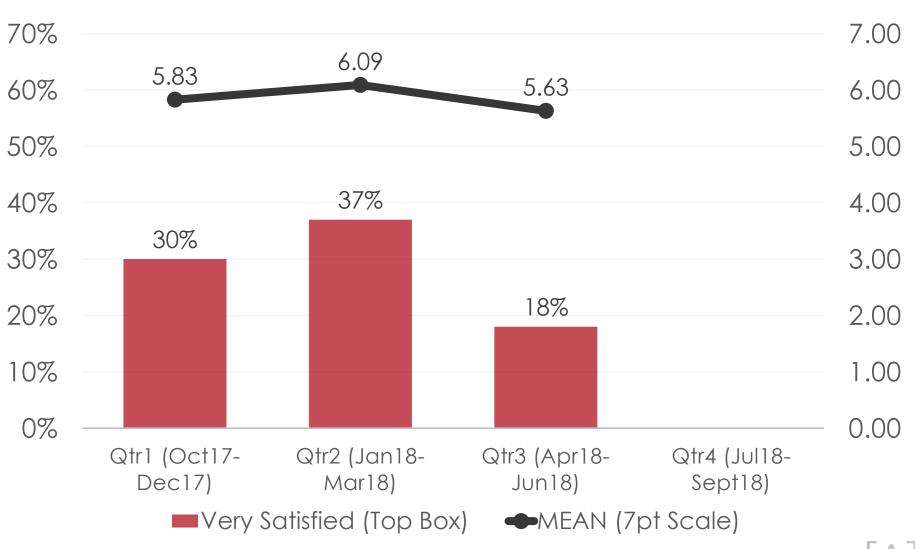
Prepared by Anthology Research

GUAM AIRPORT EXPENDITURE – FY2018 Tracking

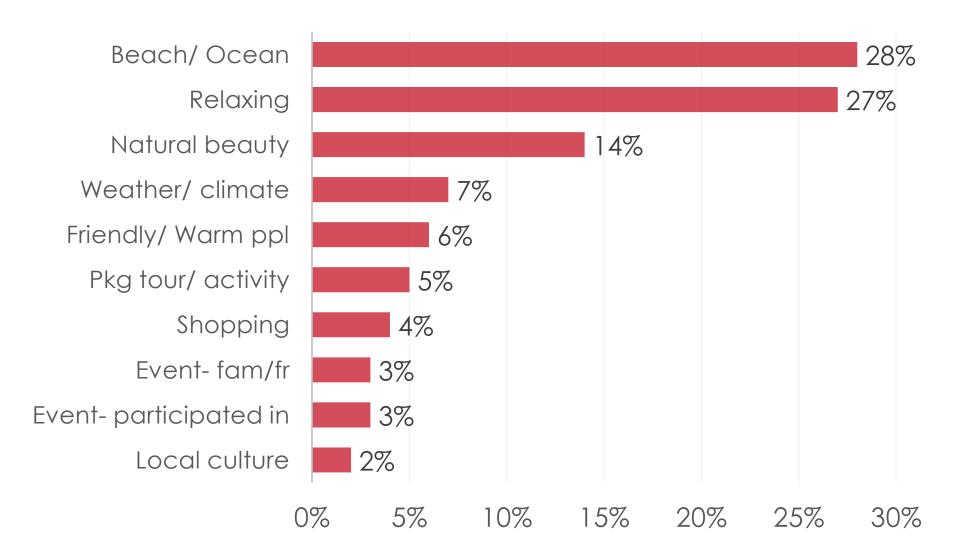


SECTION 4 VISITOR SATISFACTION BEHAVIOR

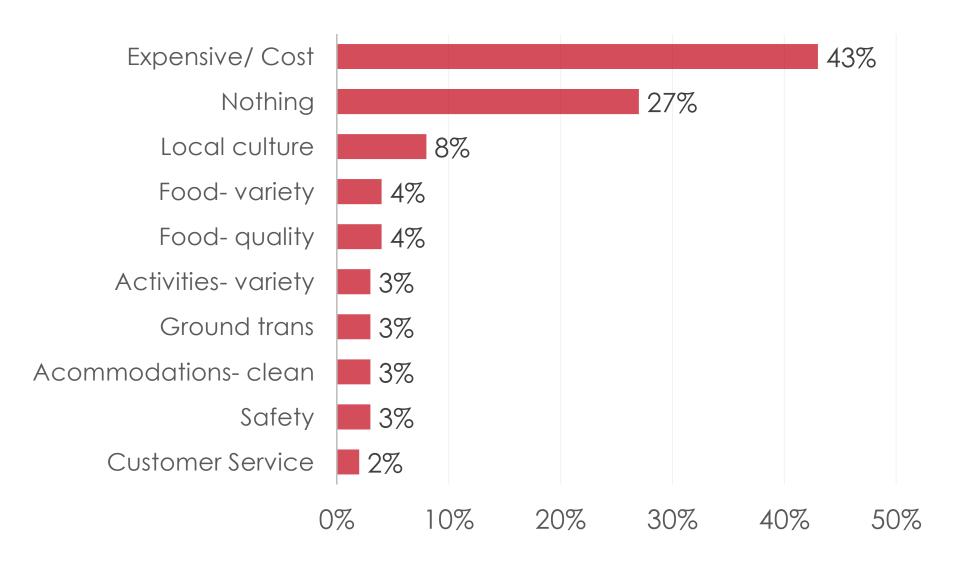
OVERALL SATISFACTION



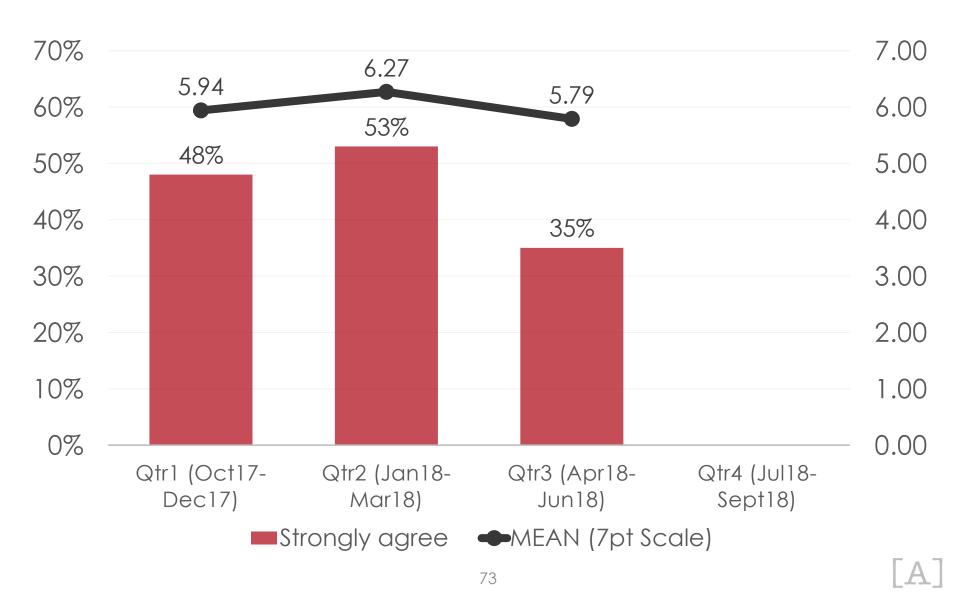
Positive Aspect of Trip



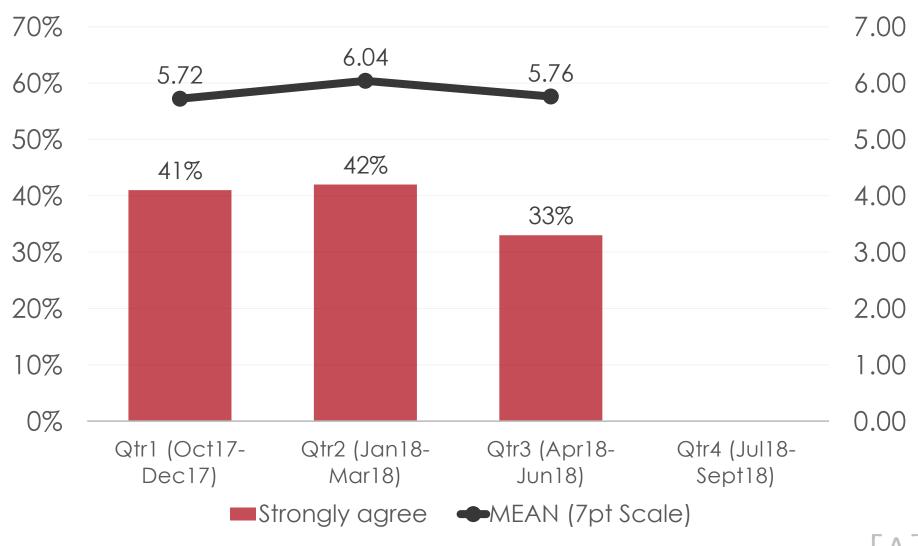
Negative Aspect of Trip



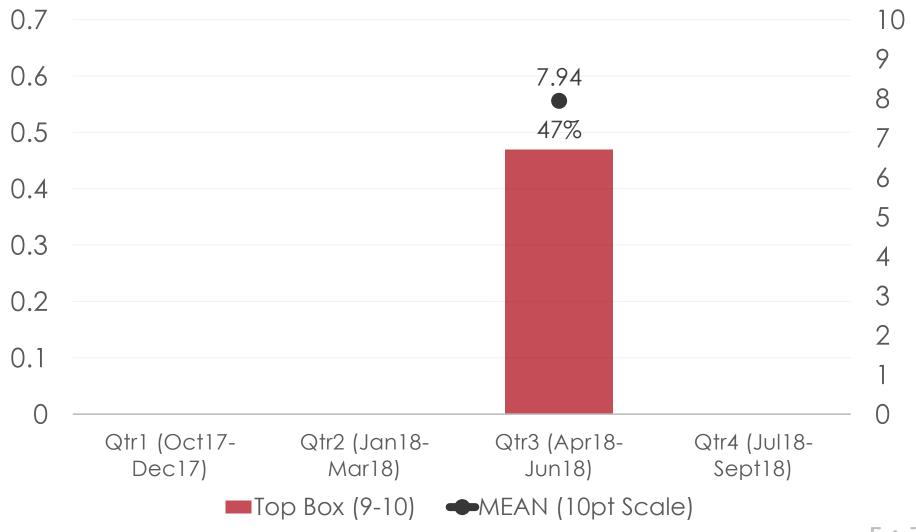
Guam was better than expected



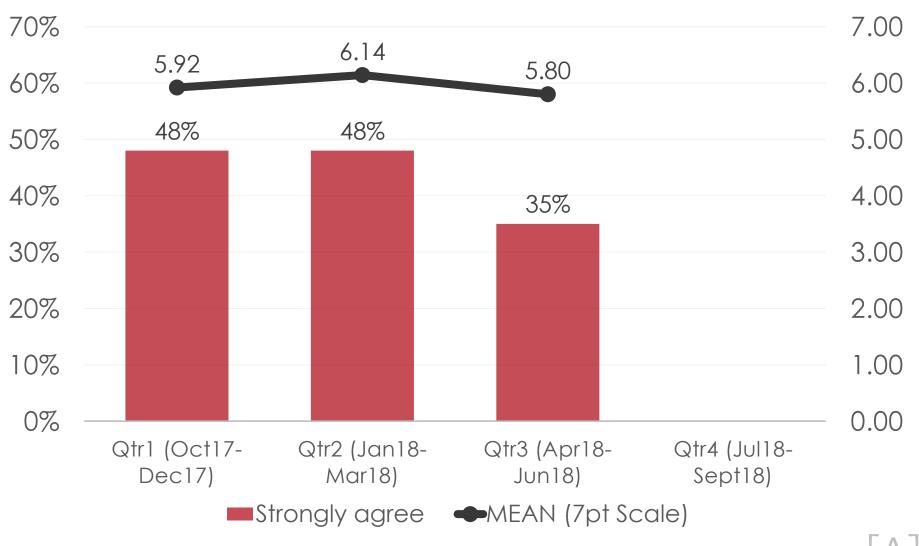
I had no communication problems



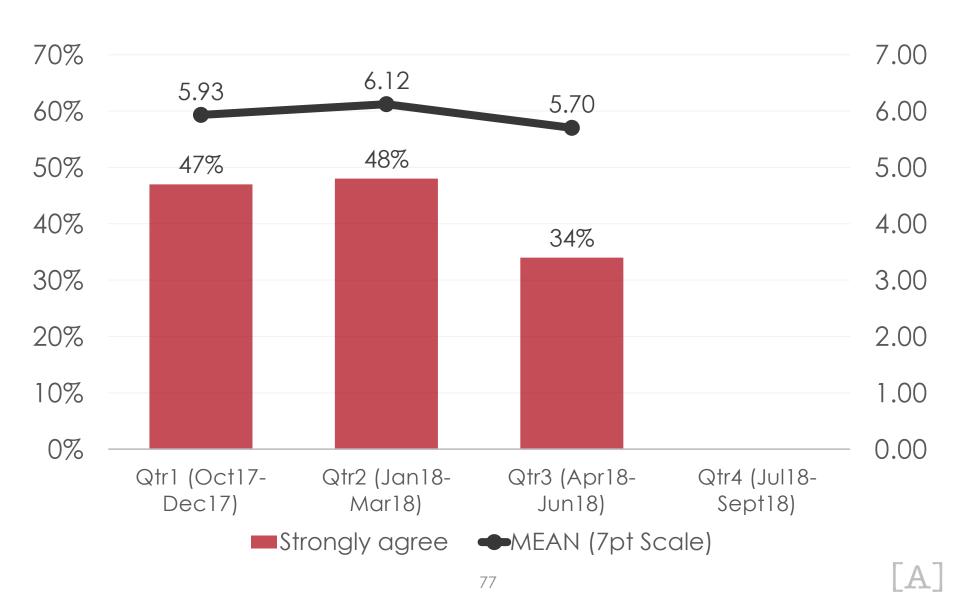
Recommend Guam - family & friends



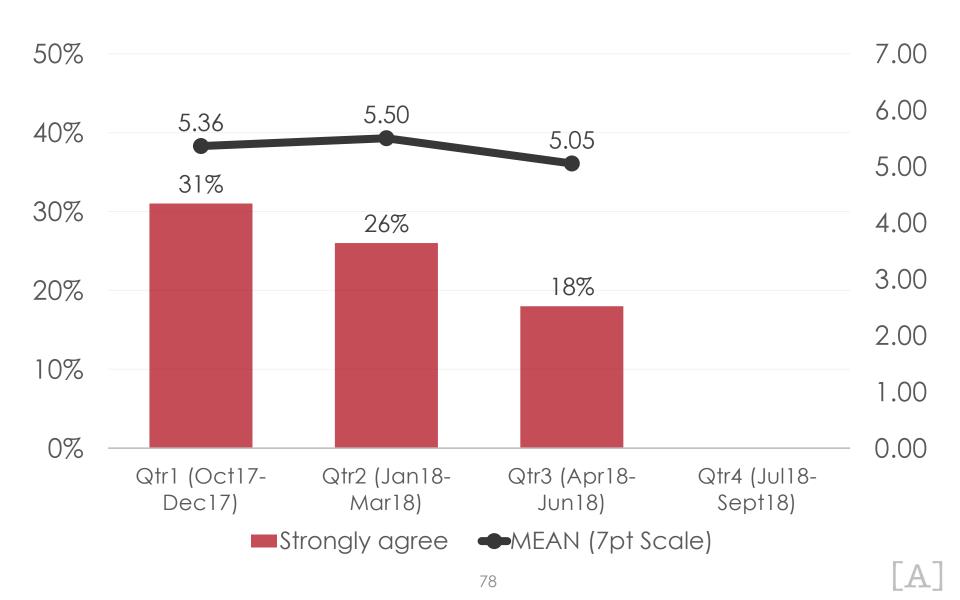
Sites on Guam were attractive



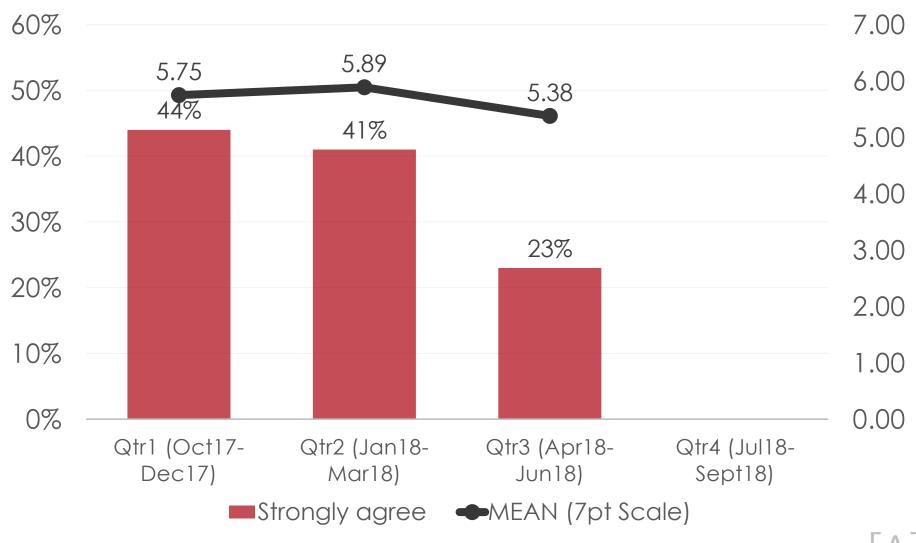
I plan to visit Guam again



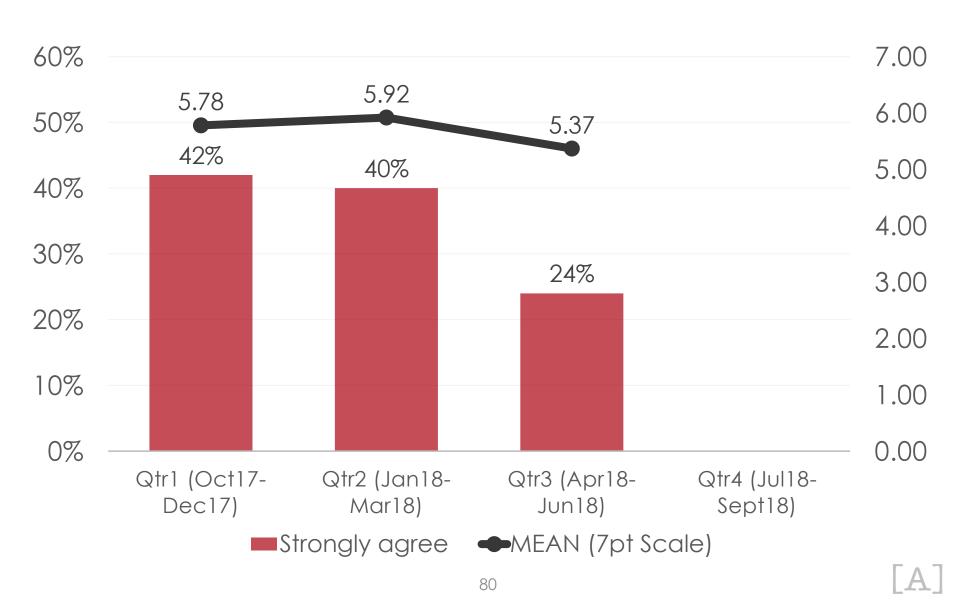
Not enough night time activities



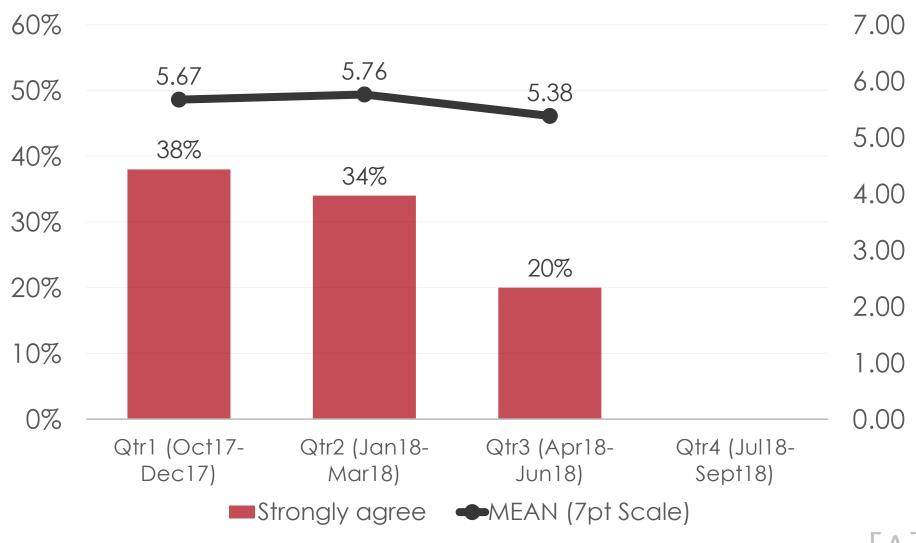
Tour guides were professional



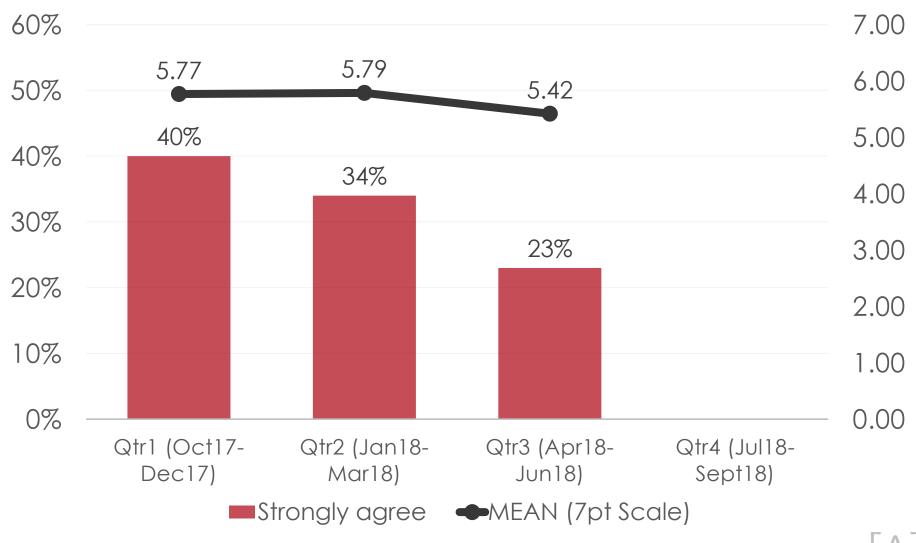
Tour drivers were professional



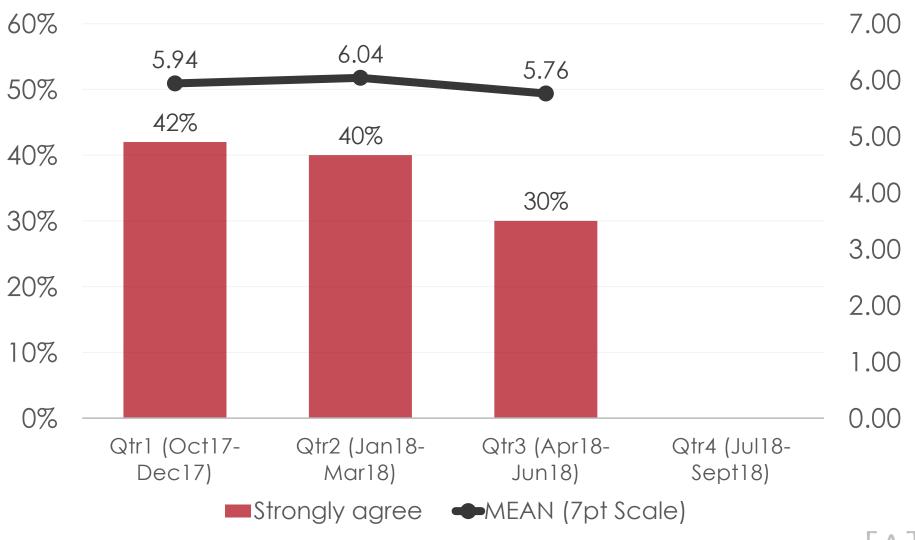
Taxi drivers were professional



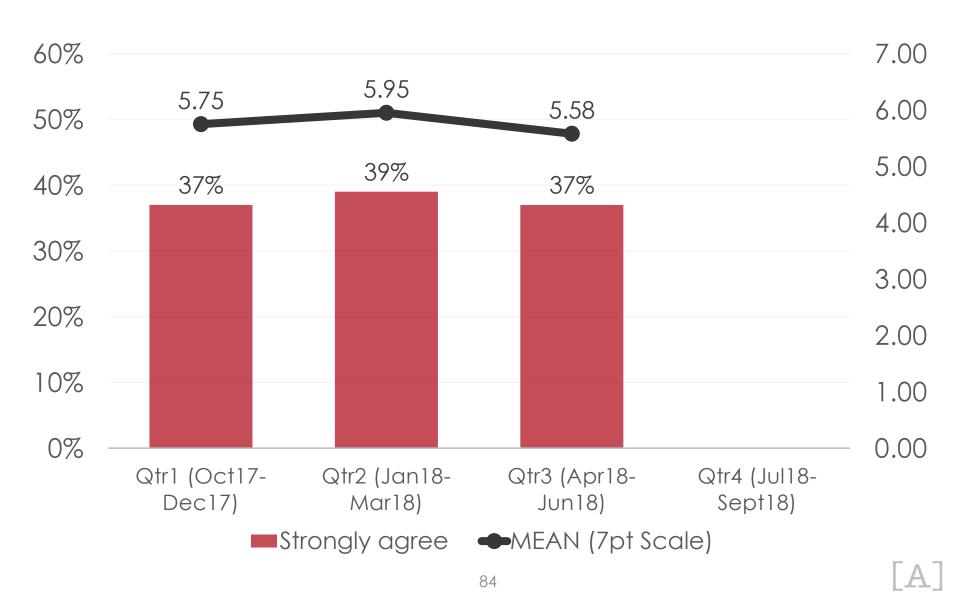
Taxis were clean



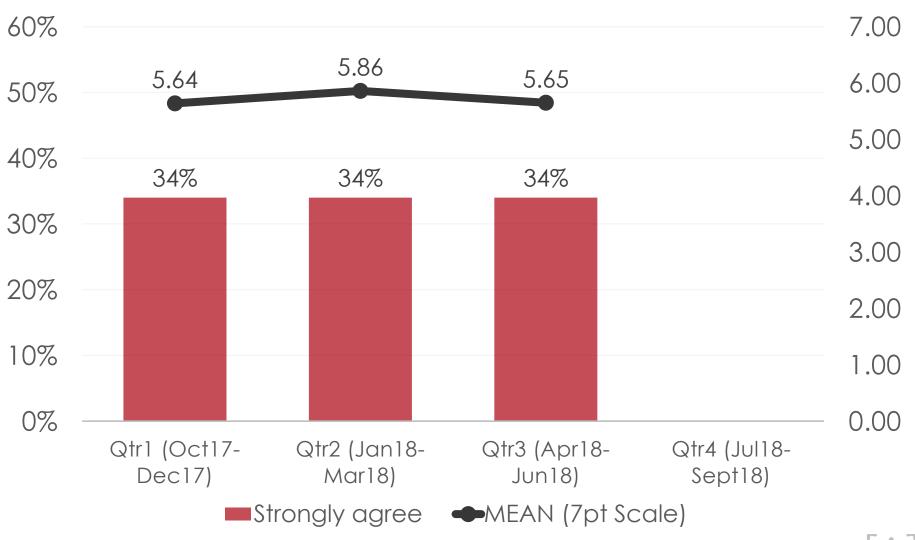
Guam airport was clean



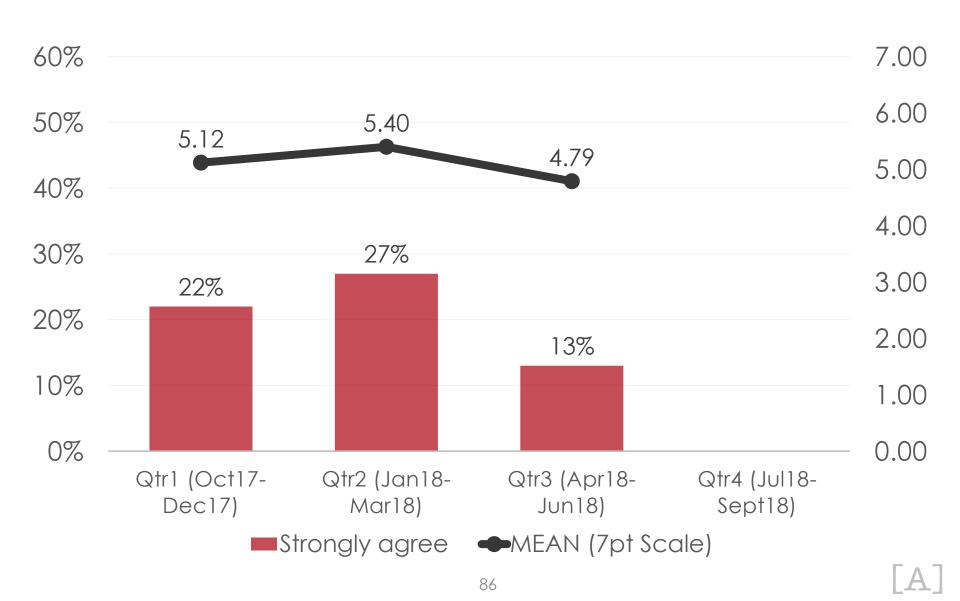
Ease of getting around



Safety walking around at night

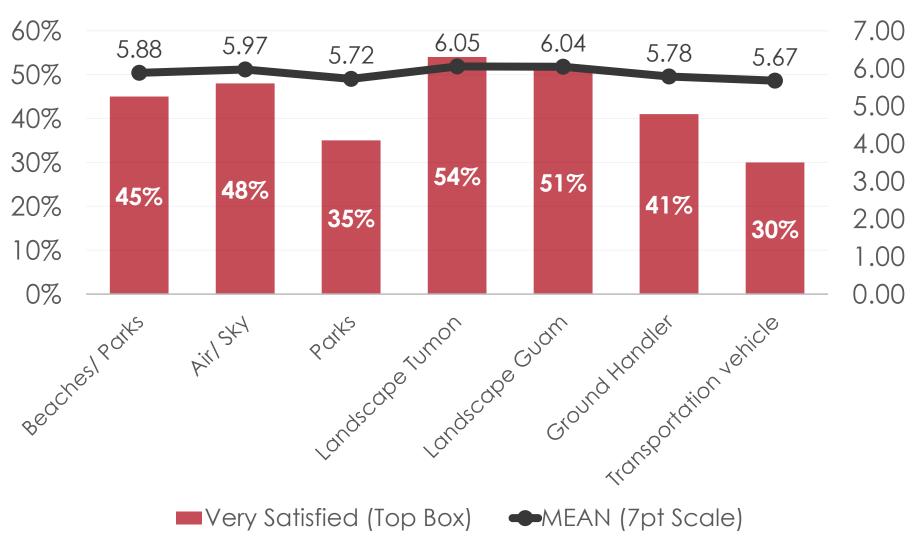


Price of things on Guam

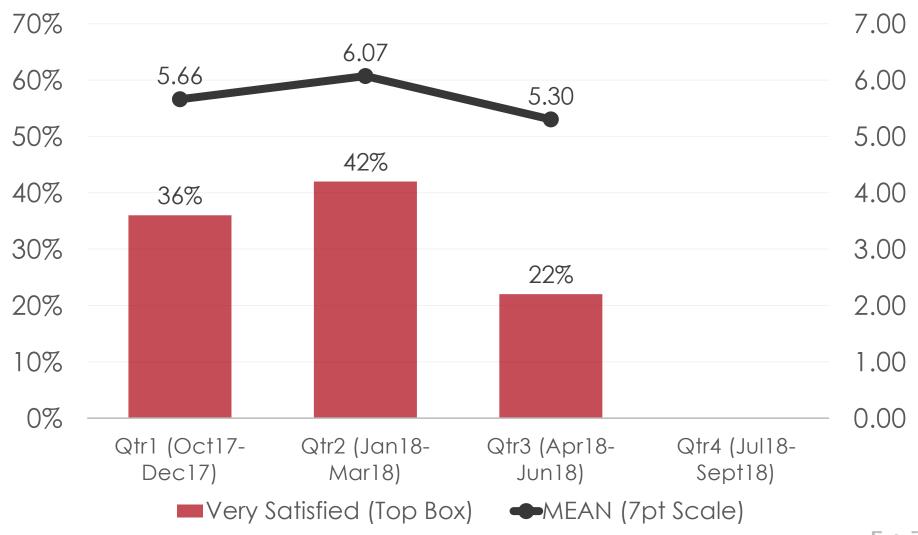


GENERAL SATISFACTION –

Quality/ Cleanliness

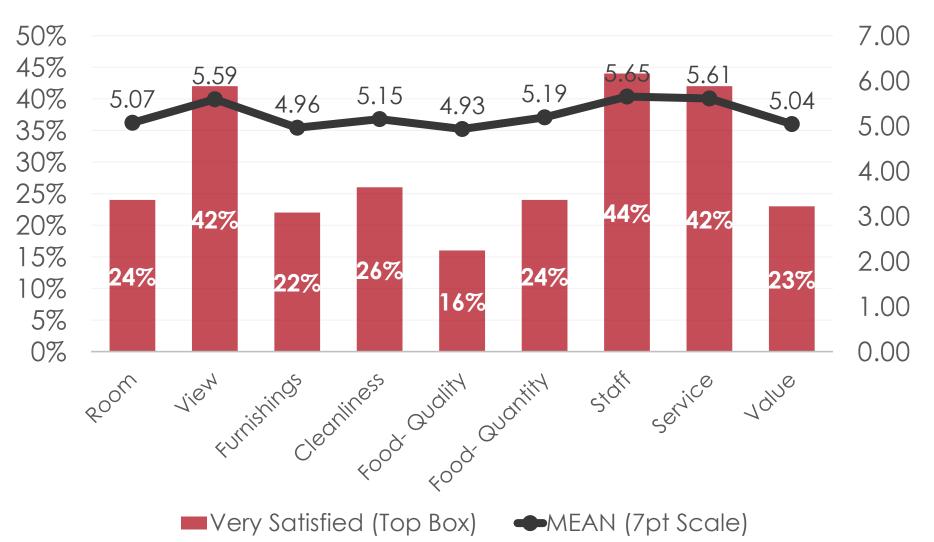


ACCOMMODATIONS – OVERALL SATISFACTION



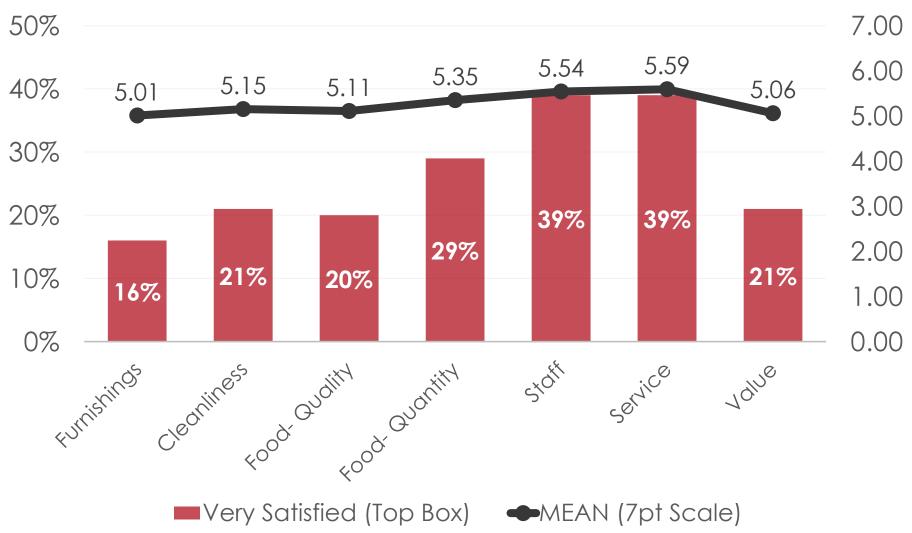
ACCOMMODATIONS –

Satisfaction by Category

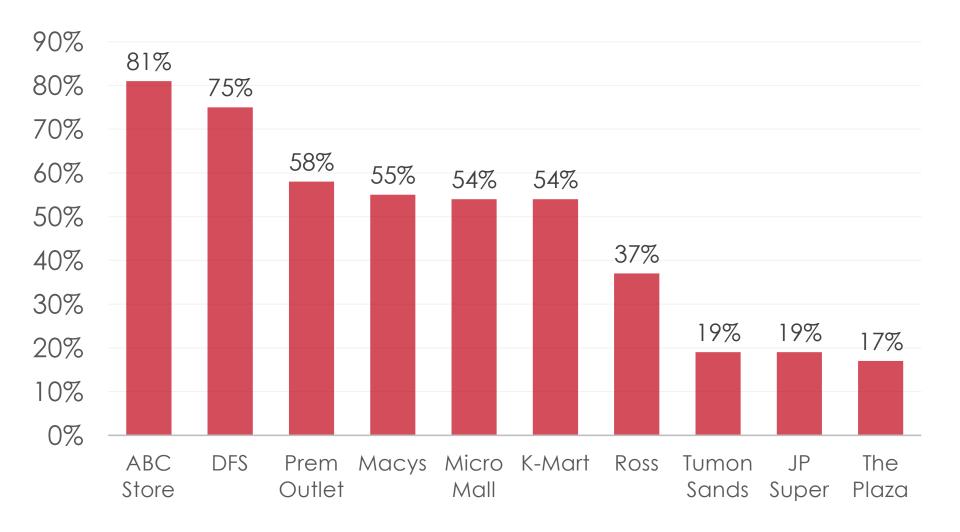


DINING EXPERIENCE (Outside Hotel) –

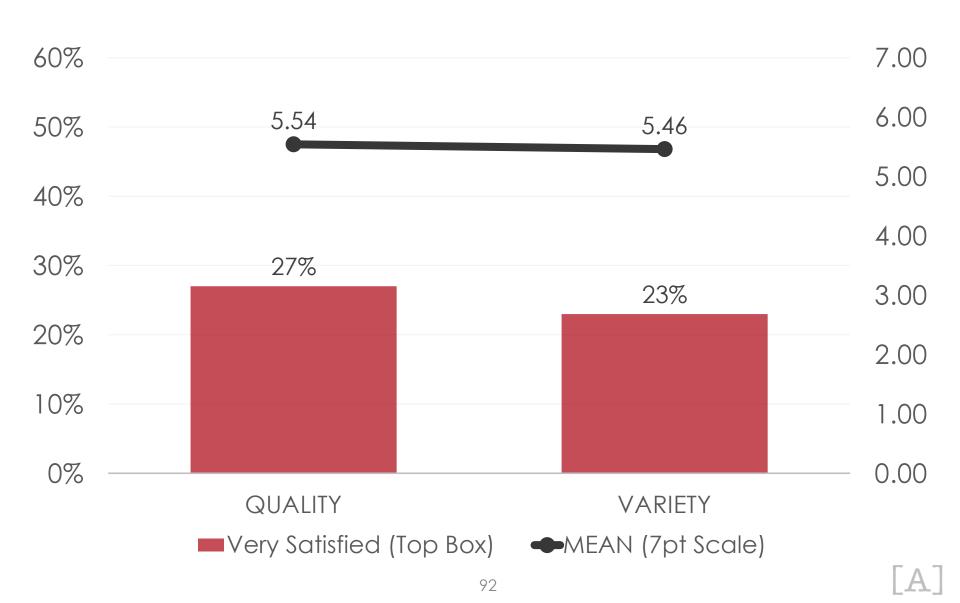
Satisfaction by Category



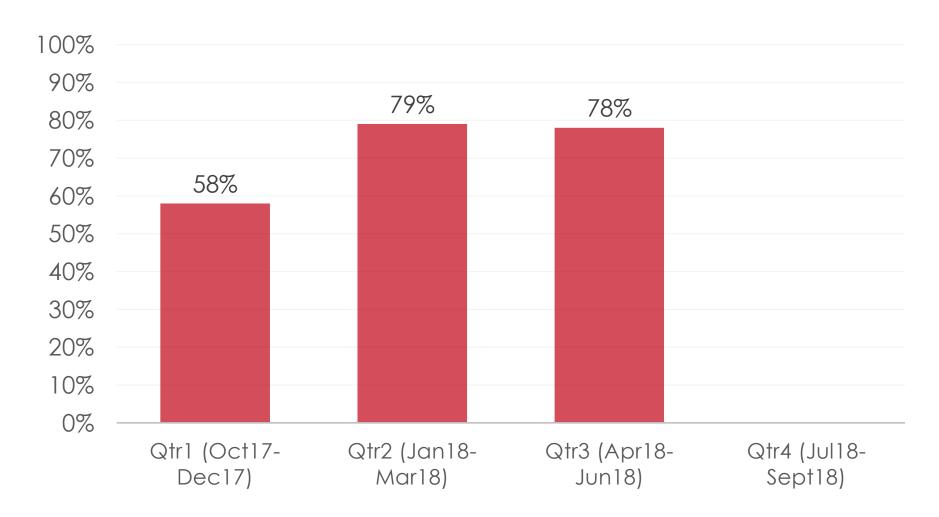
Shopping Malls/ Stores (Top Responses)



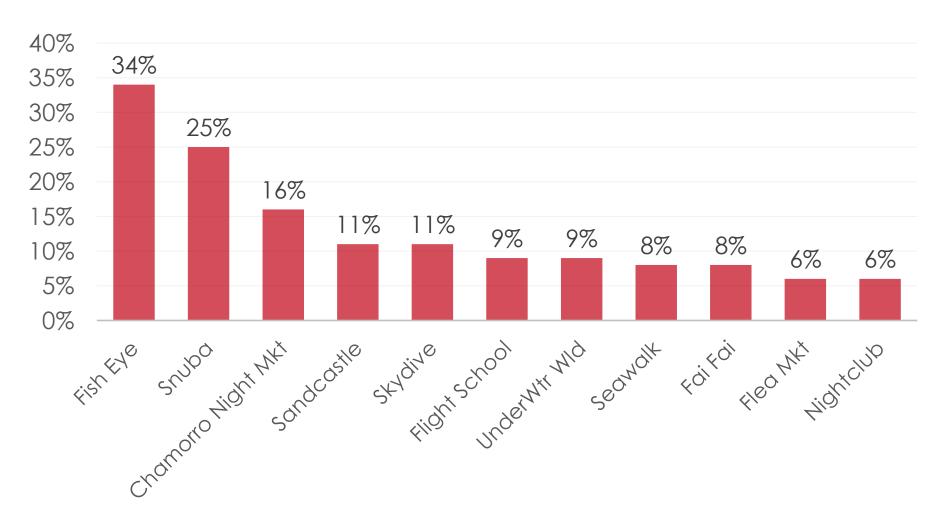
SHOPPING - SATISFACTION



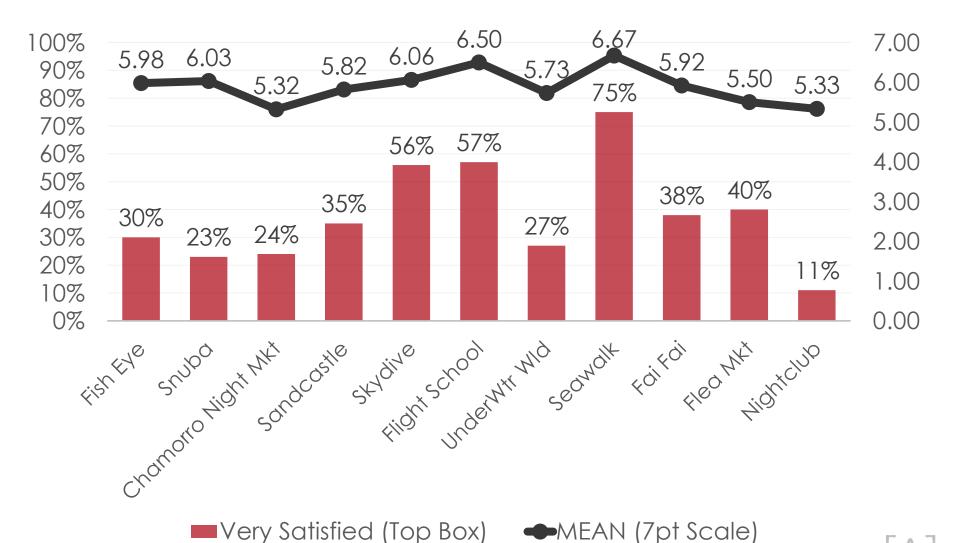
OPTIONAL TOUR PARTICIPATION – FY2018 Tracking



Optional Tour Participation (Top Responses/ 5%+)



Optional Tour Satisfaction Top Responses only - Participation (5%+)

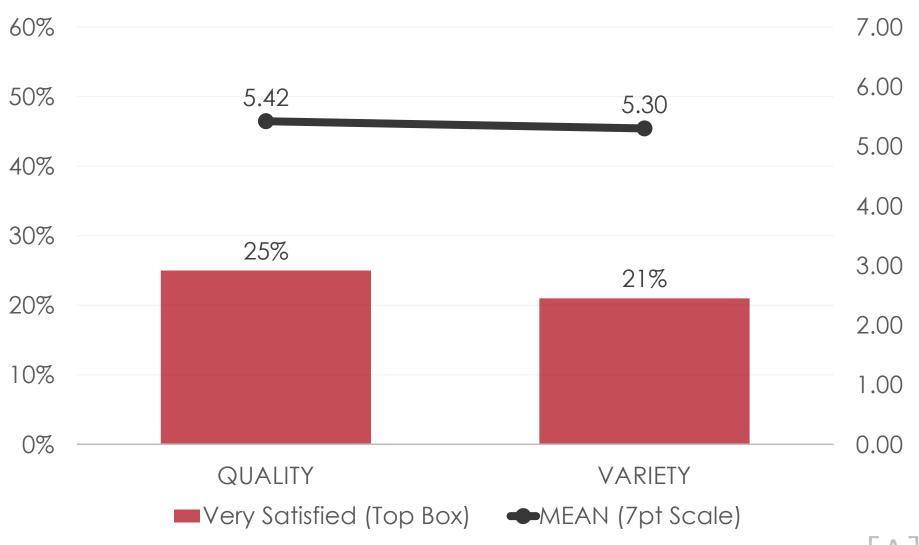


→MEAN (7pt Scale)

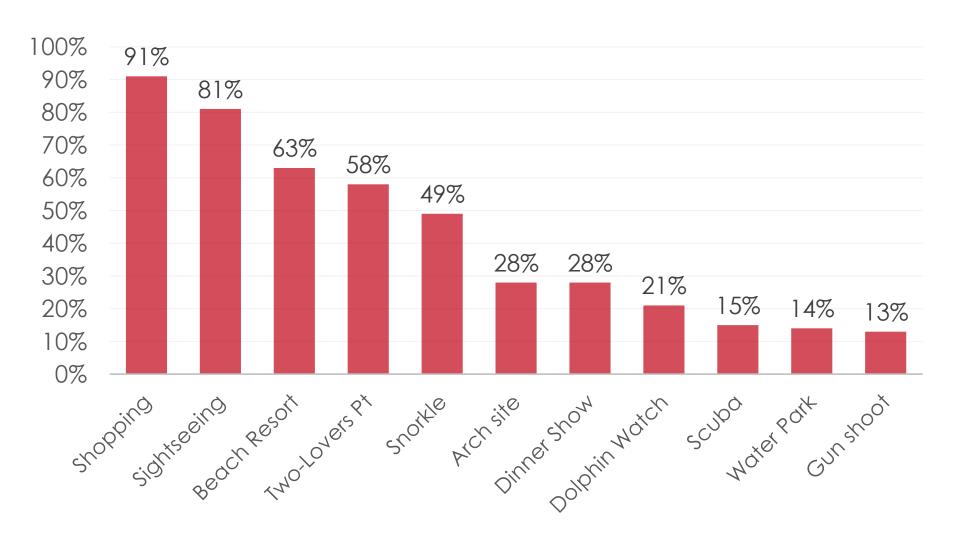
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

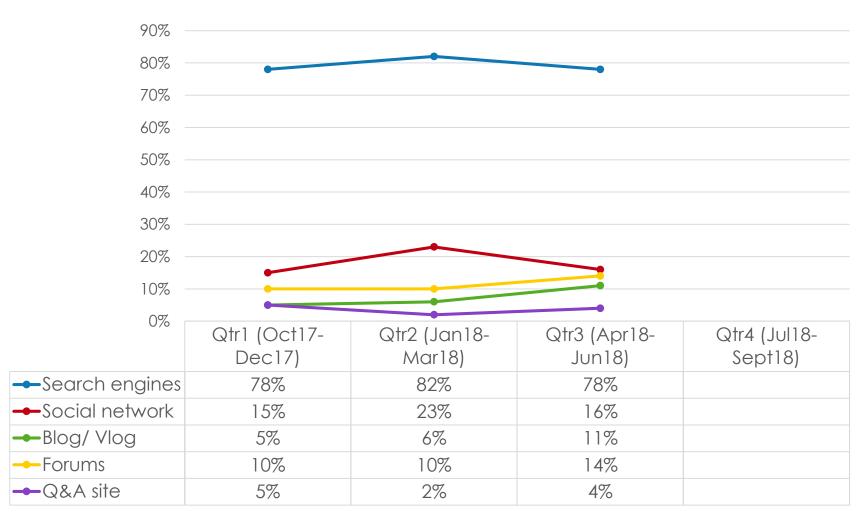


Activities Participation (Top Responses)

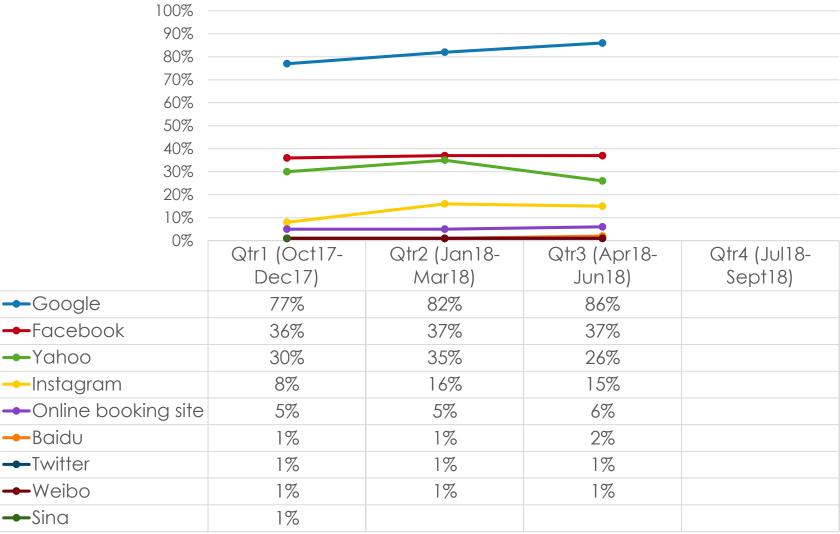


SECTION 5 PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



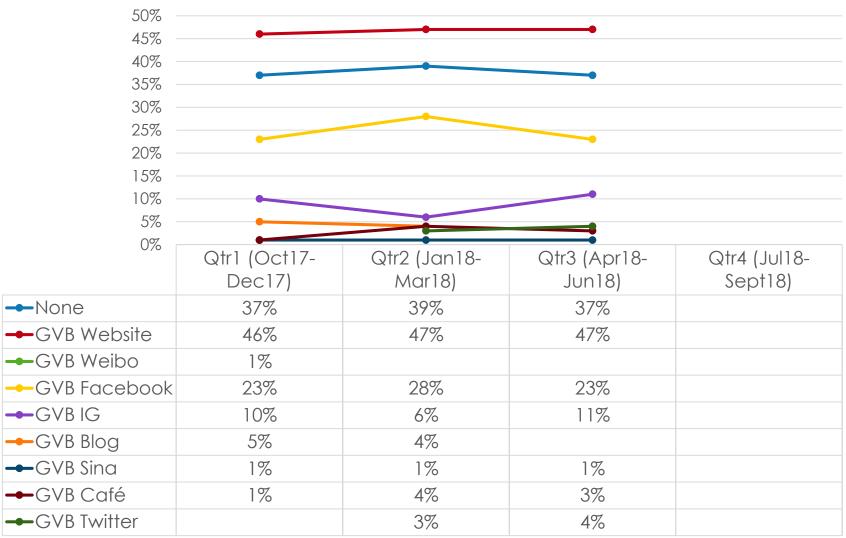
INTERNET- SOURCES OF INFORMATION Things to do on Guam



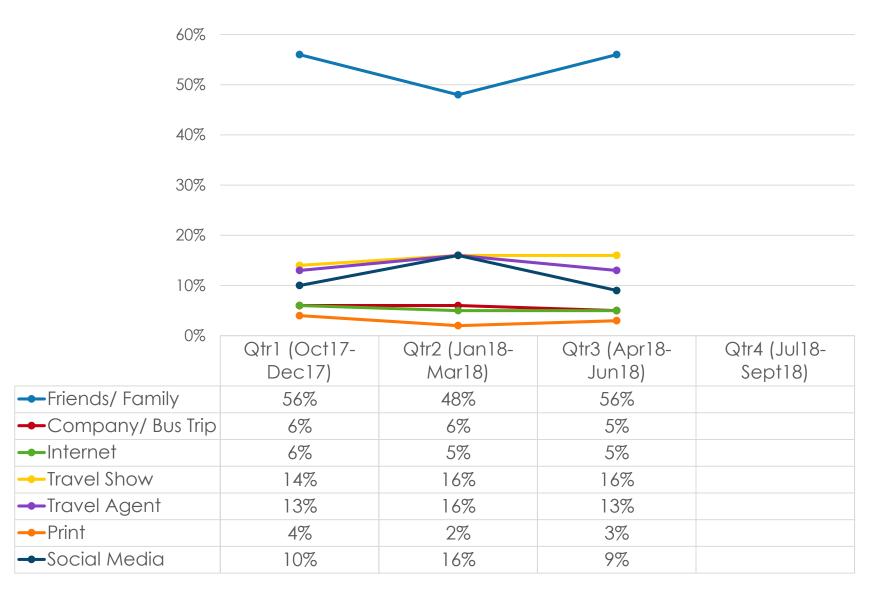
101

INTERNET- SOURCES OF INFORMATION

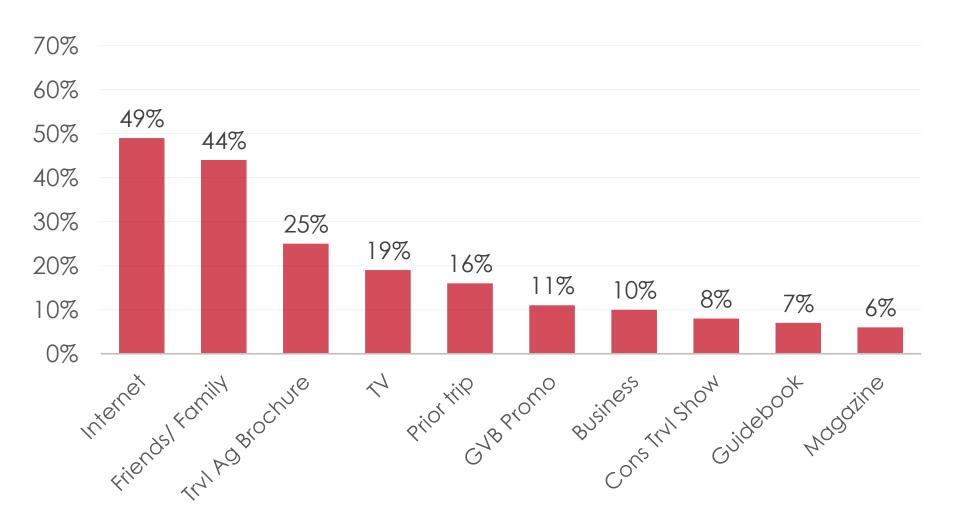
GVB



TRAVEL MOTIVATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

GVB EXIT SURVEY

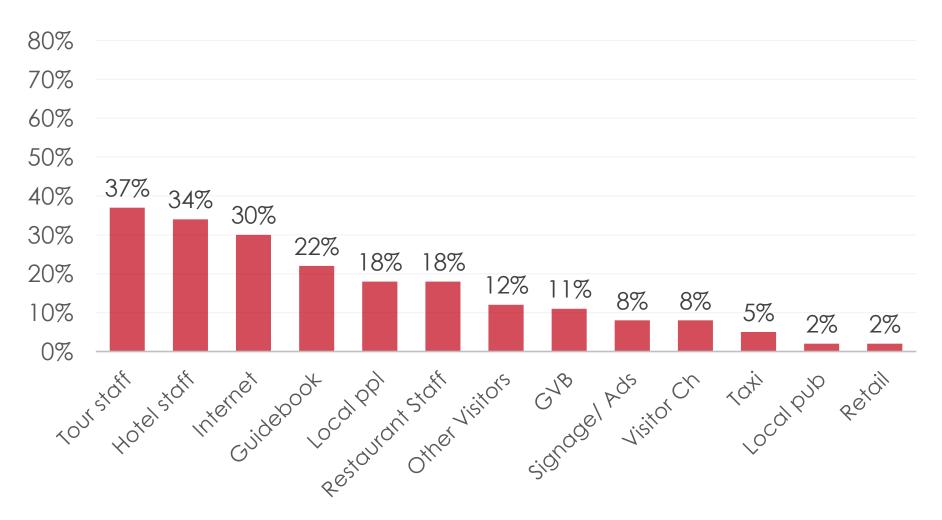
Q1 Please select the top three sources of information you used to find out about Guam before your trip:

		TOTAL	MICE -	SPORT/ADV	WEDDING	HONEYMOO N
Q1	Internet/Mobile App	49%	80%	50%	75%	50%
	Friend or relative	44%	20%	43%	75%	50%
	Travel agent brochure	25%	40%	25%	50%	36%
	TV	19%	40%	22%	25%	23%
	I have been to Guam before	16%	20%	14%		
	Guam Visitors Bureau promotional activities	11%		11%		18%
	Co-worker/ company travel department	10%	20%	9%		14%
	Consumer travel shows	8%	20%	9%		14%
	Travel guide book at bookstores	7%		9%		5%
	Magazine (consumer)	6%		6%		
	Newspaper	4%		4%		9%
	Travel trade shows	3%		3%		5%
	Guam Visitors Bureau office	2%		2%		5%
	Total	158	5	96	4	22

Prepared by Anthology Research



ONISLE SOURCES OF INFORMATION



ON-ISLE SOURCES OF INFORMATION – Key Segments

GVB EXIT SURVEY

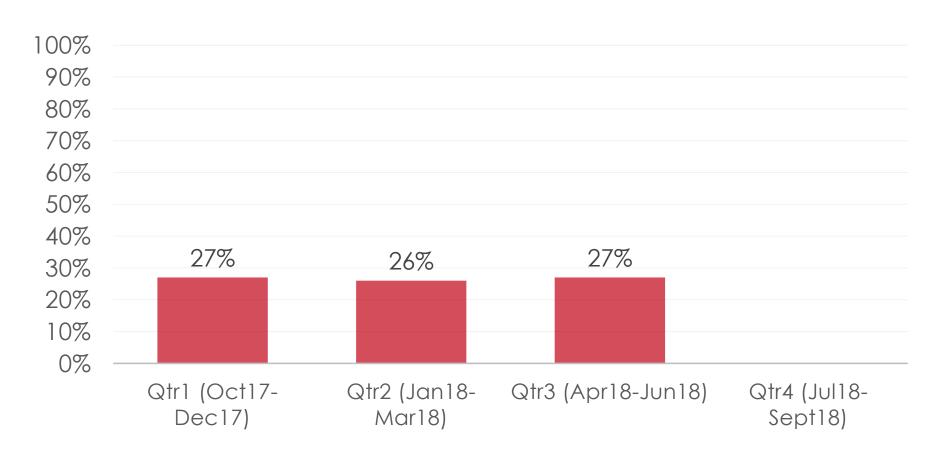
Q2 Please select the top three sources of information you used to find out about Guam while you were here:

		TOTAL	MICE	SPORT/ADV	WEDDING -	HONEYMOO N
Q2	Tour staff	37%	60%	44%	50%	64%
	Hotel staff	34%	40%	36%		18%
	Internet/Mobile App	30%	40%	27%	75%	32%
	Guide books I brought with me	22%		24%	75%	23%
	Local people	18%	20%	20%	25%	14%
	Restaurant staff (outside hotel)	18%		18%		
	Other visitors	12%	20%	11%		27%
	Guam Visitors Bureau	11%		10%	25%	9%
	Signs/ advertisement	8%	20%	8%		9%
	Visitors channel	8%	20%	7%		9%
	Taxi drivers	5%	20%	7%		9%
	Retail staff	2%	20%	3%		
	Local publication	2%		2%		
	Total	158	5	96	4	22

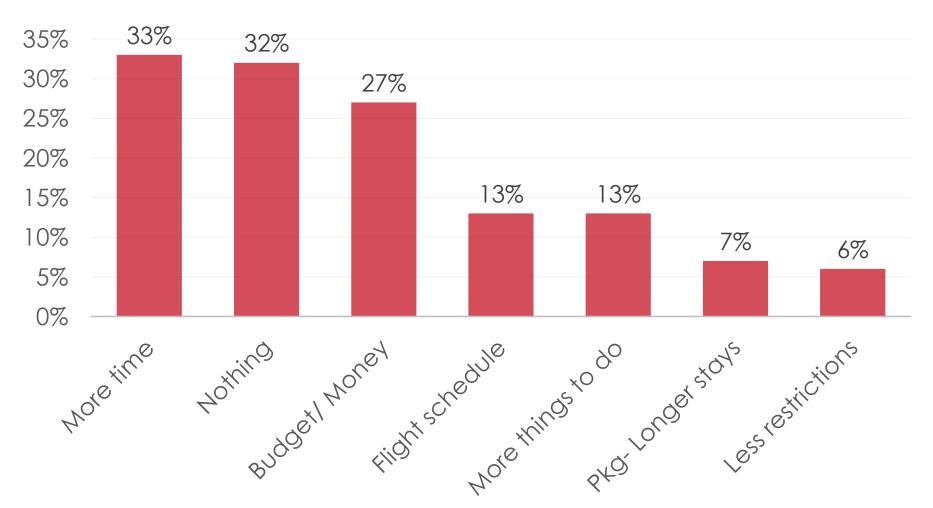
Prepared by Anthology Research

SECTION 6 FUTURE TRAVEL TO GUAM

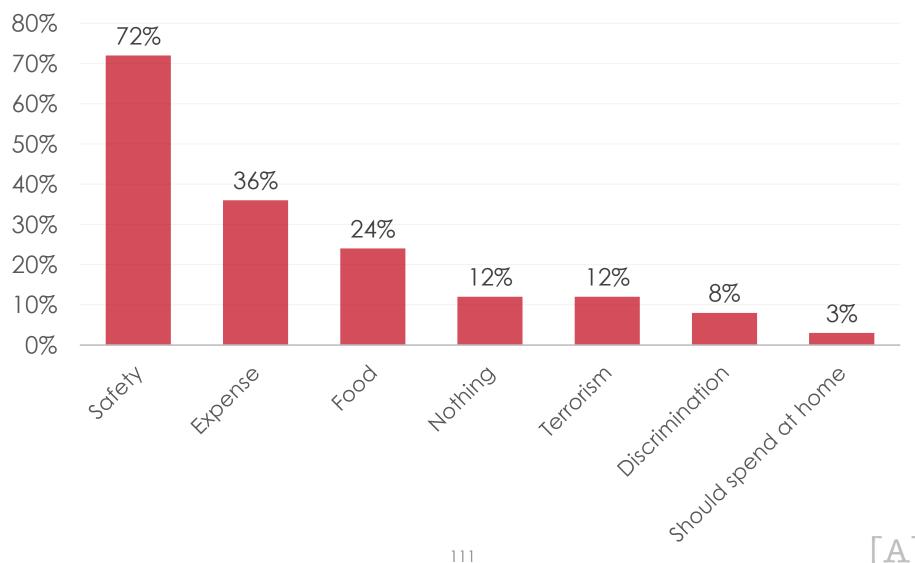
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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

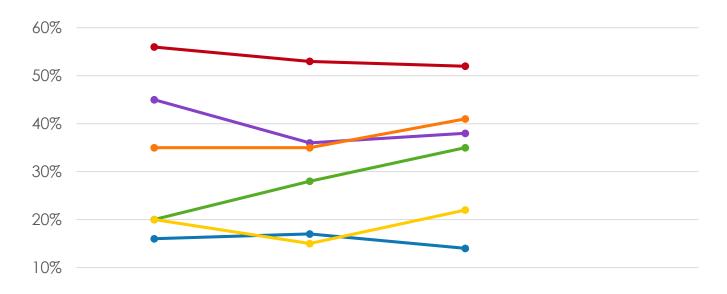


FUTURE TRAVEL CONCERNS



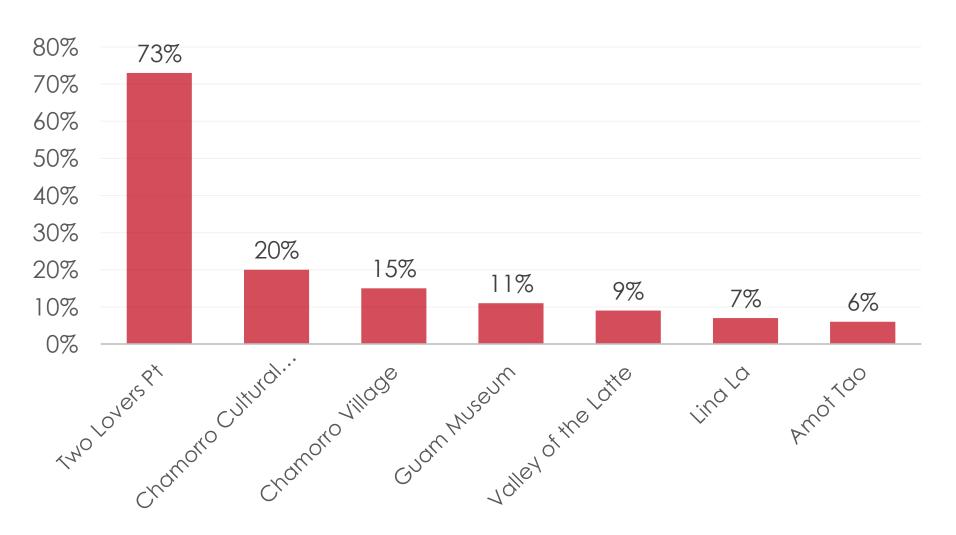
SECTION 7 GUAM CULTURE

EXPERIENCED-CHAMORRO/ HAFA ADAI SPIRIT

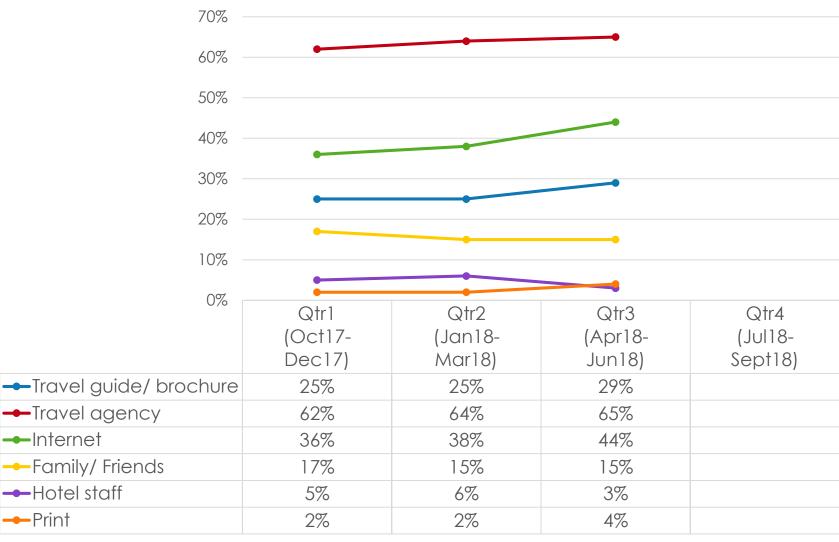


0%				
070	Qtr1 (Oct17-	Qtr2 (Jan18-	Qtr3 (Apr18-	Qtr4 (Jul18-
	Dec17)	Mar18)	Jun18)	Sept18)
→ Did NOT experience	16%	17%	14%	
→ Beaches	56%	53%	52%	
→ Chamorro cuisine	20%	28%	35%	
→Night Market	20%	15%	22%	
→ Socializing- locals	45%	36%	38%	
→Local Music	35%	35%	41%	

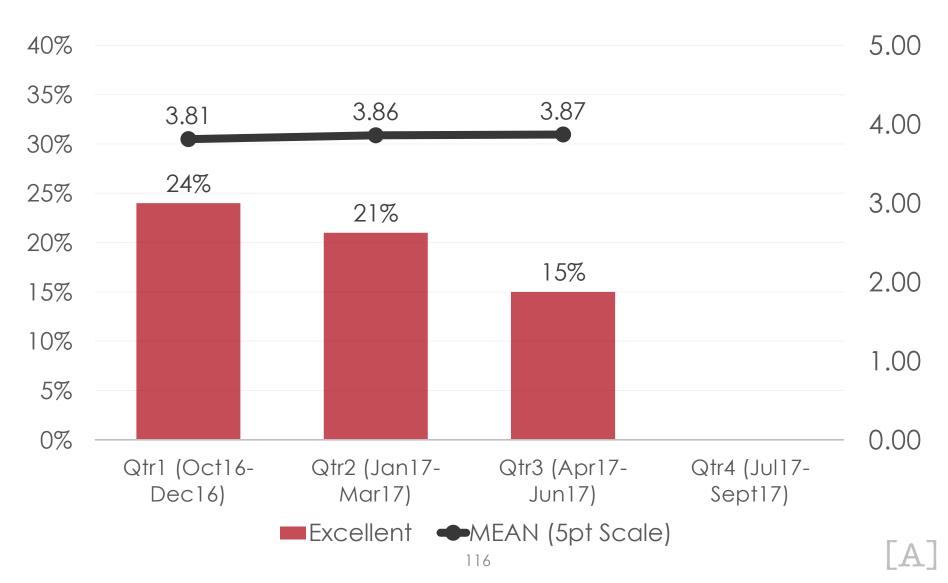
EXPERIENCEDOTHER CULTURAL ACTIVITY/EVENTS



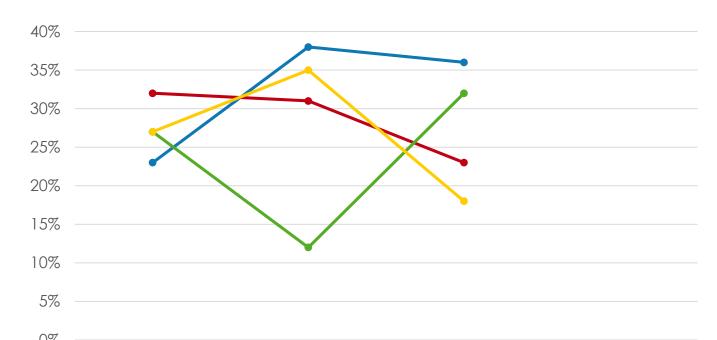
SOURCES OF INFORMATION-CULTURAL ACTIVITY/EVENTS



SATISFACTION-CULTURAL ACTIVITY/EVENTS



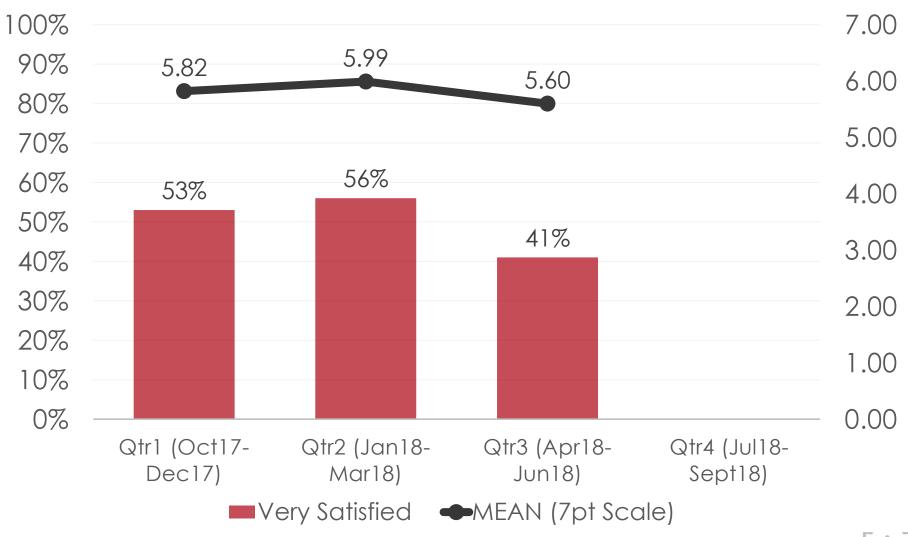
OBSTACLES-CULTURAL ACTIVITY/EVENTS



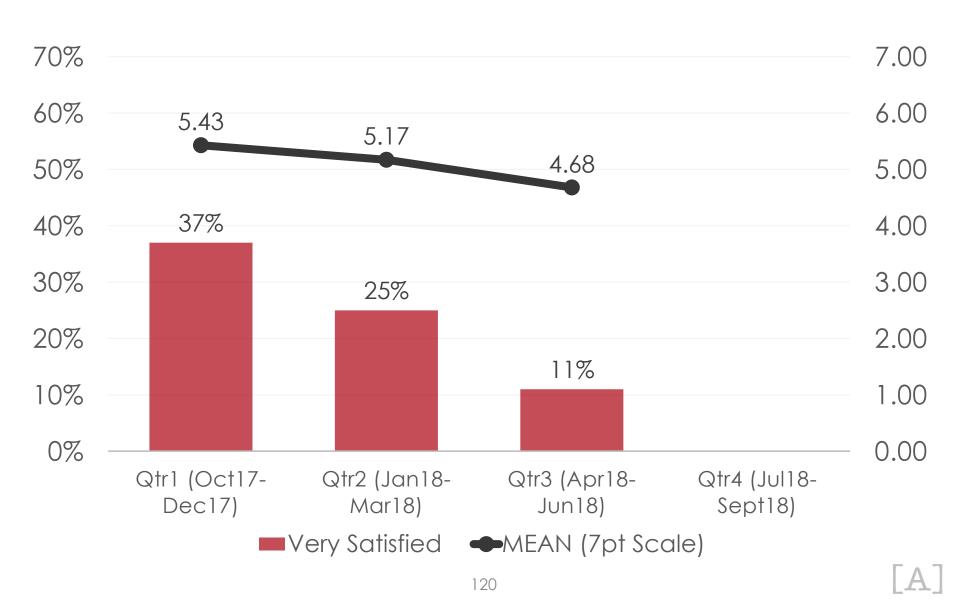
0%	Qtr1 (Oct17- Dec17)	Qtr2 (Jan18- Mar18)	Qtr3 (Apr18- Jun18)	Qtr4 (Jul18- Sept18)
→ Schedule	23%	38%	36%	
→ Unaware	32%	31%	23%	
→ Did not want to	27%	12%	32%	
→ Did not know where	27%	35%	18%	

WEDDING SATISFACTION

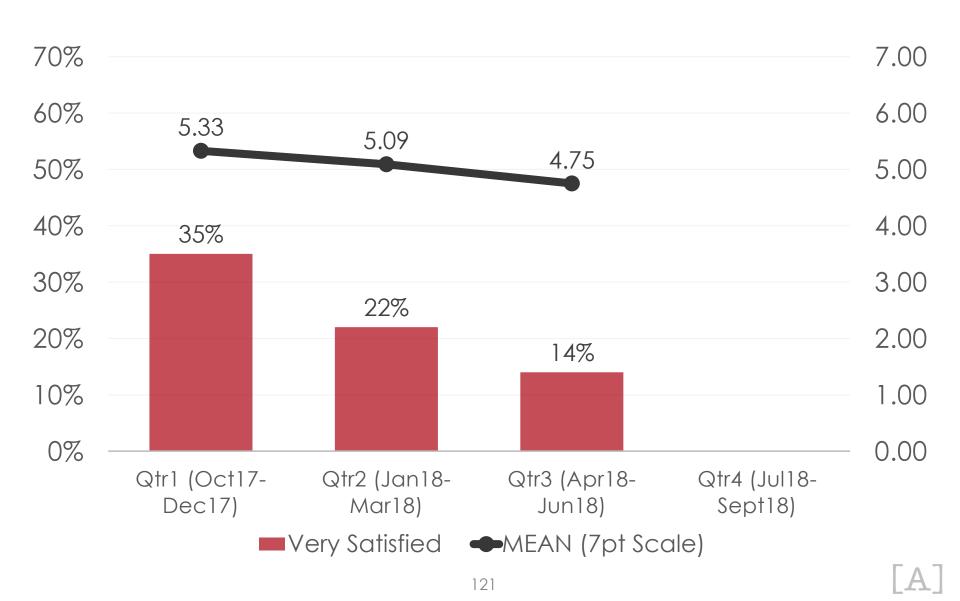
Wedding Facility



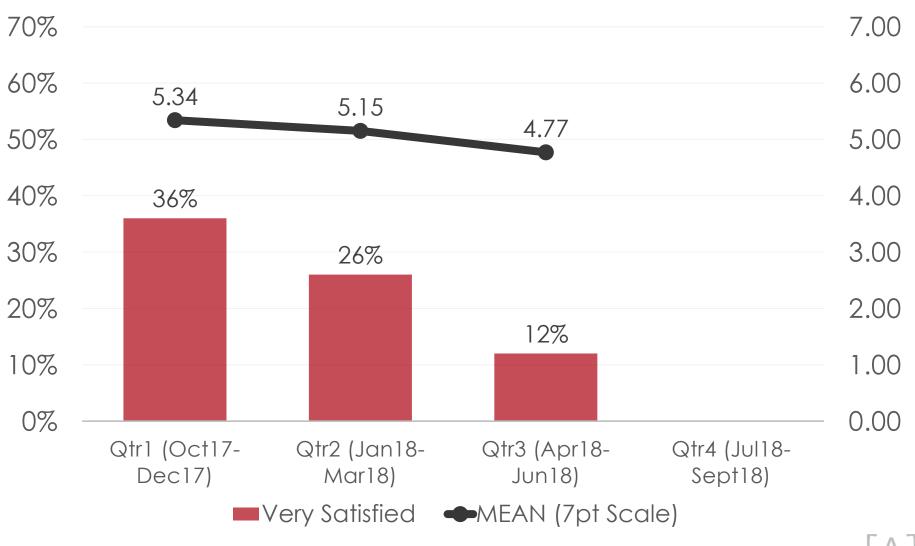
Wedding Facility Staff



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=<.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 Qtr. and Overall 1-3 Qtr. 2018					
				Combined 1-3 Qtr.	
	1st Qtr.	2nd Qtr.	3rd Qtr.	2018	
Drivers:	rank	rank	rank	rank	
Quality & Cleanliness of beaches & parks					
Ease of getting around					
Safety walking around at night					
Quality of daytime tours	1		1		
Variety of daytime tours				2	
Quality of nighttime tours					
Variety of nighttime tours					
Quality of shopping					
Variety of shopping			2		
Price of things on Guam		2		3	
Quality of hotel accommodations				4	
Quality/cleanliness of air, sky	2				
Quality/cleanliness of parks					
Quality of landscape in Tumon					
Quality of landscape in Guam		1		1	
Quality of ground handler					
Quality/cleanliness of transportation vehicles					
% of Per Person On Island Expenditures					
Accounted For	57.5%	37.7%	32.4%	44.4%	
NOTE: Only significant drivers are included.					

Drivers of Overall Satisfaction

- Overall satisfaction with the Taiwan visitor's experience on Guam is driven by two significant factors in the 3rd Quarter 2018 Period. By rank order they are:
 - Quality of daytime tours, and
 - Variety of shopping.
- With these two factors the overall r² is .324, meaning that **32.4%** 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 Qtrs. 2018, and Overall 1-3rd Qtrs. 2018					
				Combined 1-3 Qtr.	
	1st Qtr	2nd Qtr	3rd Qtr.	2018	
Drivers:	rank	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%	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 3rd Quarter FY2018 period.