

TAIWAN VISITOR PROFILE

OCTOBER - DECEMBER 2019

VISITOR SATISFACTION



54%
VERY
SATISFIED



8.5/10
AVERAGE

29%
BEACH WAS
EXCELLENT



23%
EXPENSIVE



62%
EXTREMELY LIKELY
TO RECOMMEND



39%
EXTREMELY LIKELY
TO RETURN IN THE
NEXT THREE YEARS

SPENDING



\$167.19
ON ISLAND
PER PERSON
PER DAY



\$1,297.37
TOTAL SPENDING
PER PERSON
(PREPAID + ON ISLAND)

MOST POPULAR



Recreation

74% Shopping

Local Attractions

68% Two Lovers Point

Entertainment & Dining

57% Fine Dining

Sightseeing

48% Scenic Views/
Natural Landmarks

Sports

40% Snorkeling

History, Culture & Arts

38% Chamorro Cuisine

TAIWAN VISITOR PROFILE

OCTOBER - DECEMBER 2019

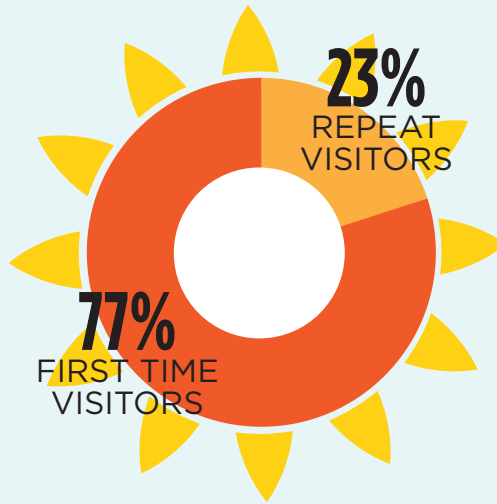
TRAVELER PROFILE



33.2
AVERAGE AGE

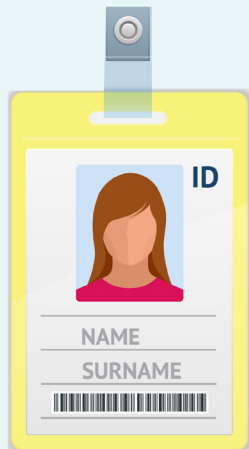


5.4
AVERAGE
PARTY SIZE



5.0
NIGHTS
AVERAGE
LENGTH
OF STAY

OCCUPATION



Occupation	Percentage
COMPANY, NON-MANAGER	20%
COMPANY, ENGINEER	17%
COMPANY, SALES	10%
PROF/SPECIALIST	8%

TRAVEL MOTIVATIONS



Motivation	Percentage
Natural Beauty	44%
Relax	38%
Shopping	28%
Vacation	18%
Scuba Diving	17%

TRIP PLANNING



67%
MADE TRAVEL
ARRANGEMENTS
ONLINE



30%
USED A
TRAVEL
WEBSITE



30%
USED A
TRAVEL AGENT



39%
BOOKED DIRECT
WITH AIRLINE
AND/OR HOTEL



Guam Visitors Bureau

Taiwan Visitor Tracker Exit Profile & Market Segmentation Report

FY2020 – QTR.1 (OCT-DEC 2019)

[ANTHOLOGY®]
RESEARCH



Background and Methodology

- All surveys were partially interviewer administered. Upon completion of the surveys, Anthology's professional Taiwanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent was present.
- A total of 151 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 151 is +/- 8.0 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 +/- 8.0 percentage points.

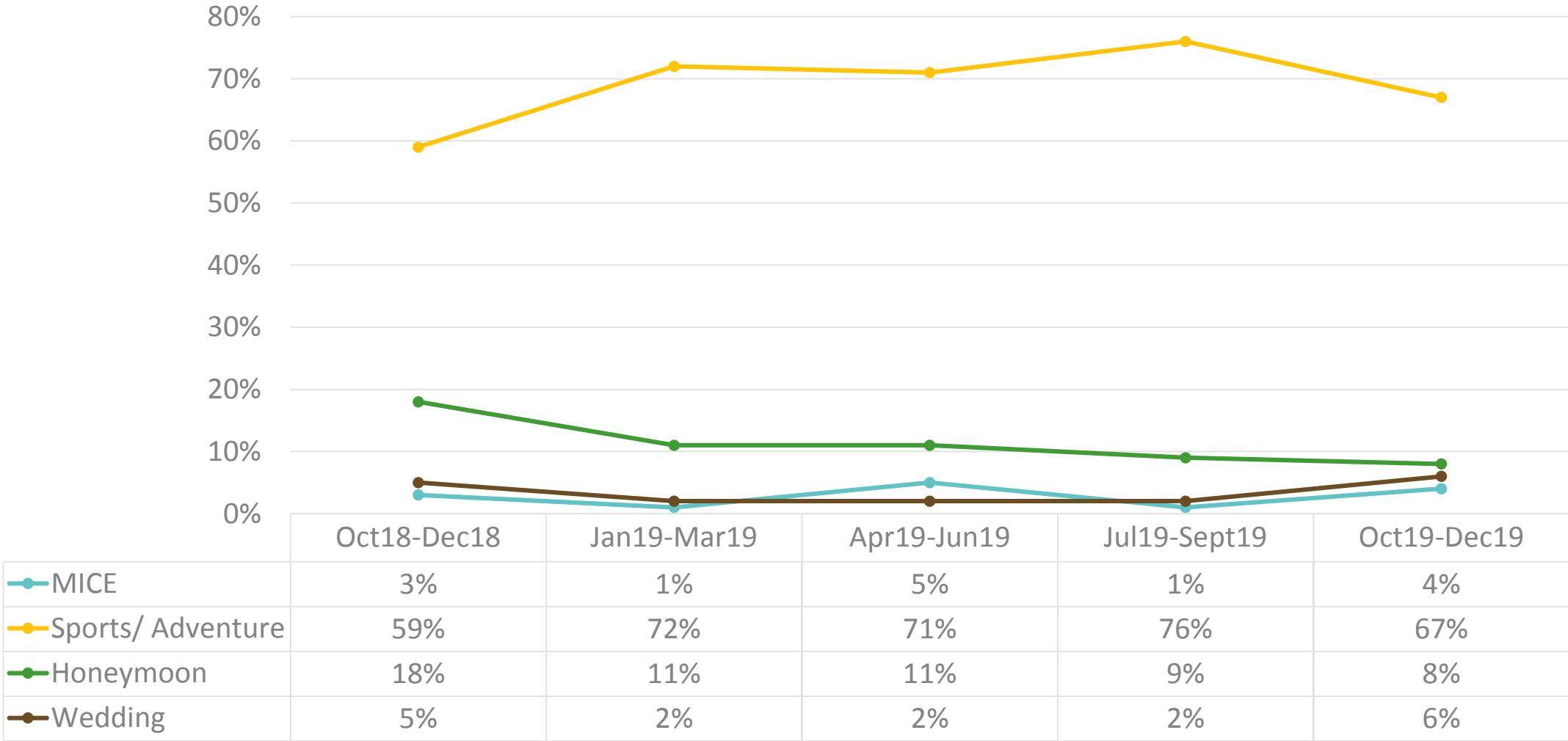
Objectives

- To monitor the effectiveness of the Taiwan seasonal campaigns in attracting Taiwanese visitors, refresh certain baseline data, and 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 (Q8 Convention/ Conference/ Trade Show/ Incentive Trip)
 - Honeymoon (Q8)
 - Wedding (Q8 Get married/ attend wedding)
 - Sport/ Adventure (Q8 Scuba, water sports, organized sporting activity/ event / Q38)
 - To identify the most significant factors affecting overall visitor satisfaction.
 - To identify (for all visitors from Taiwan) the most important determinants of on-island spending.

Key Highlighted Segments



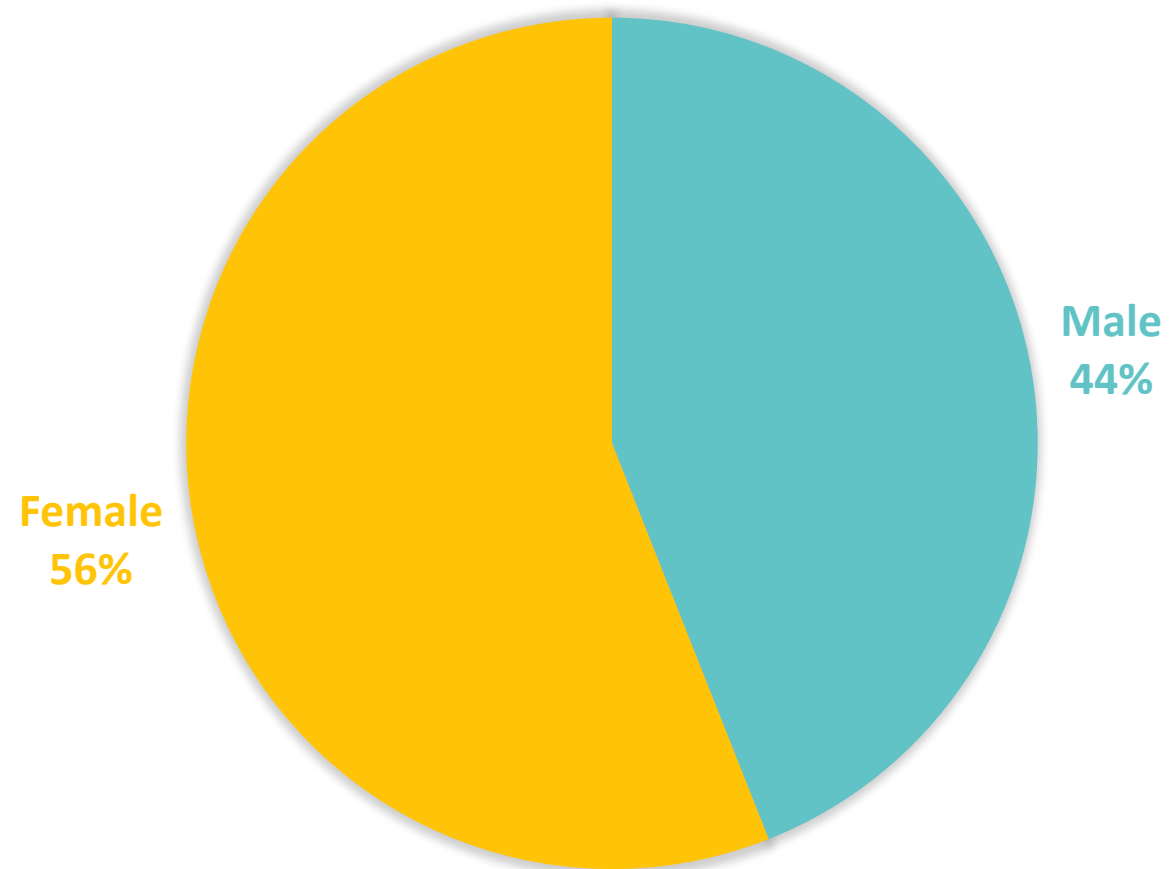


SECTION 1

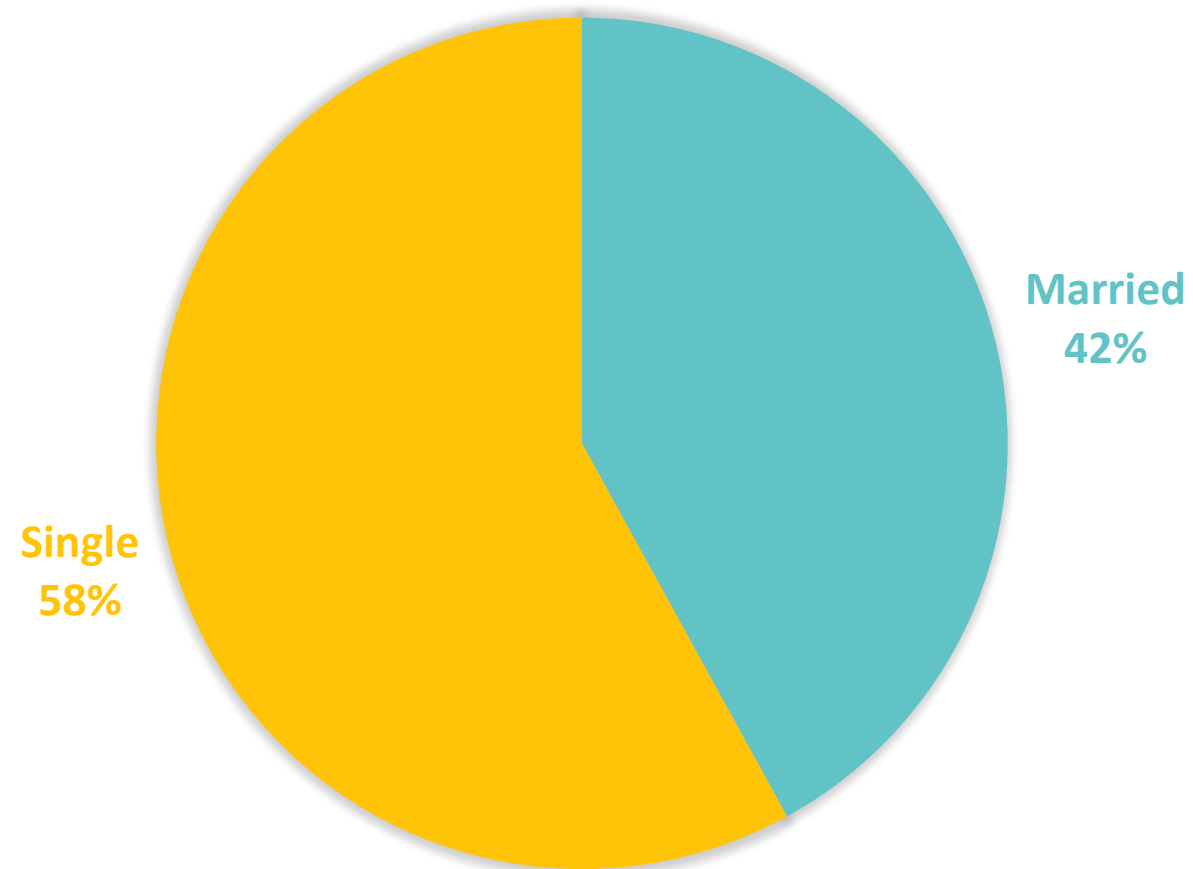
PROFILE OF RESPONDENTS



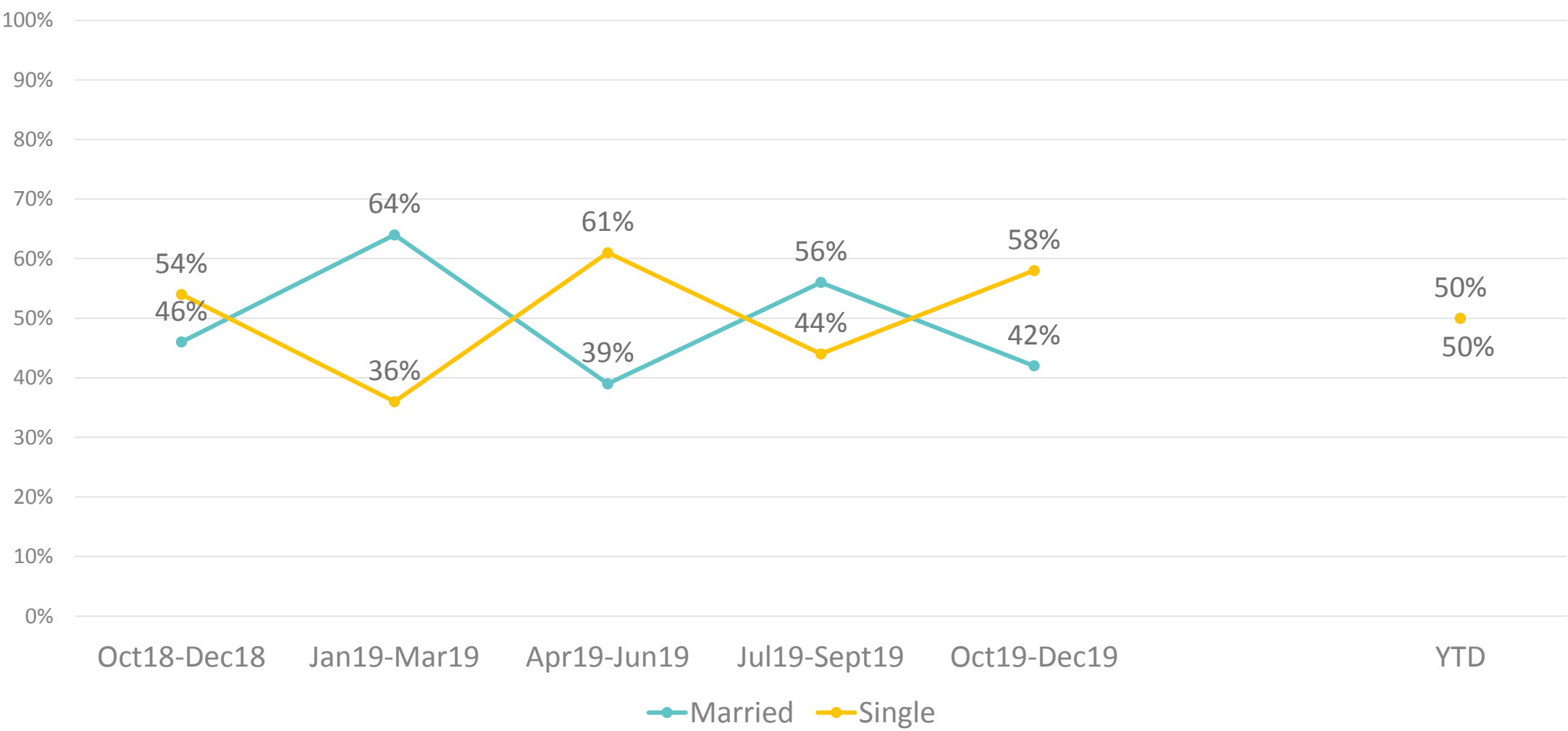
GENDER



MARITAL STATUS



MARITAL STATUS – TRACKING



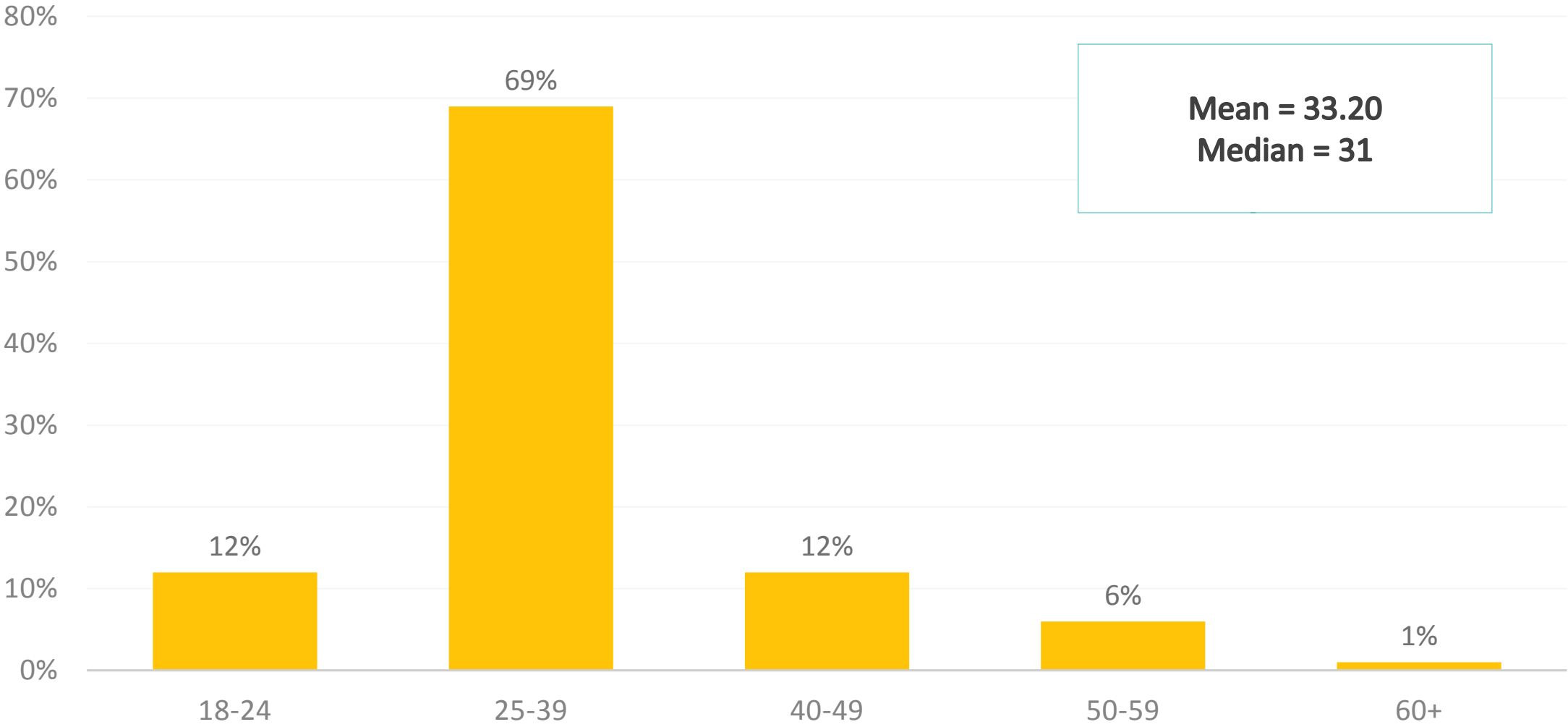
MARITAL STATUS – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
QE Are you married or single?

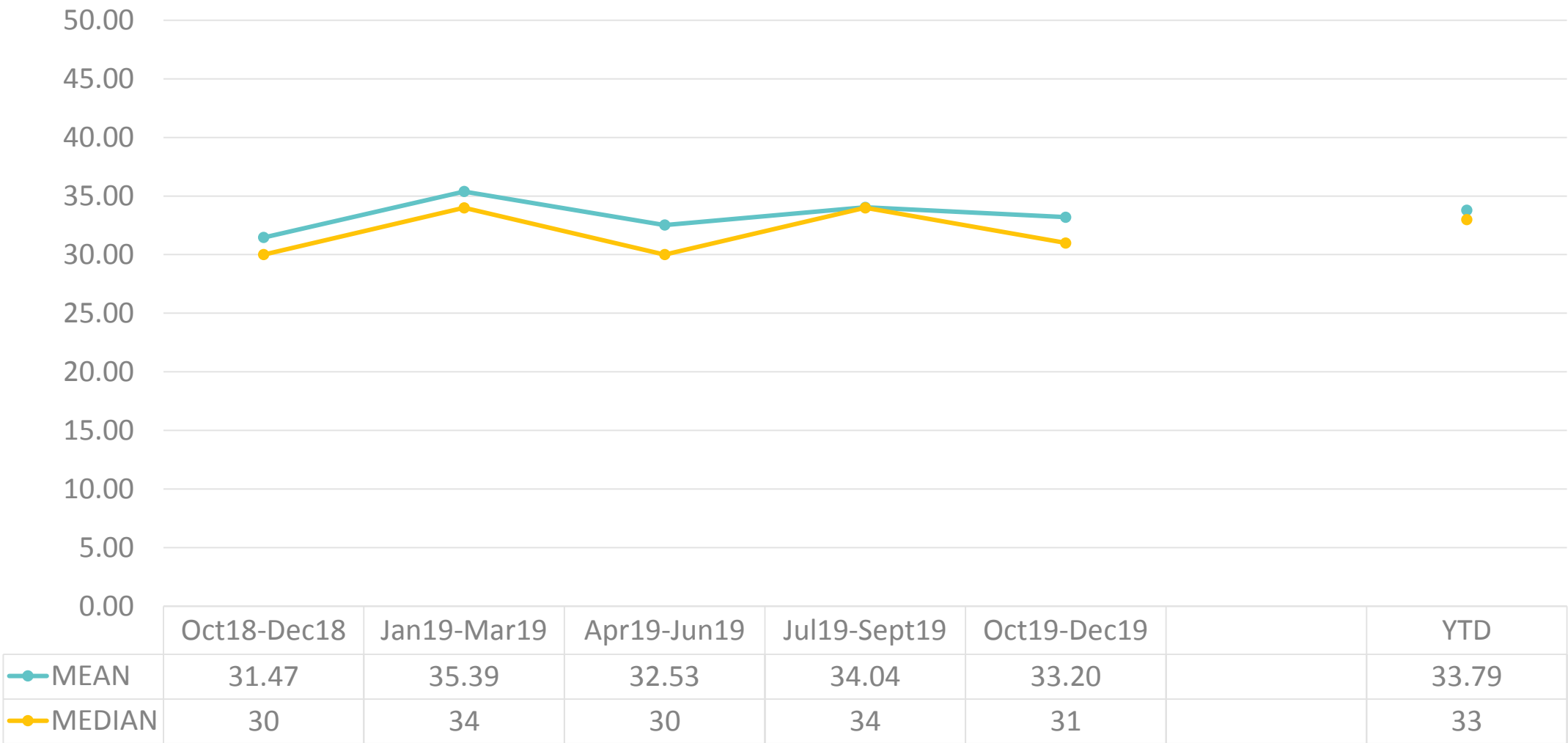
		TOTAL	SPORTS/ ADVENTURE	MICE	HONEYMOON	WEDDING
		-	-	-	-	-
QE	Married	42%	40%	50%	100%	56%
	Single	58%	60%	50%		44%
	Total	151	101	6	12	9

Prepared by Anthology Research

AGE



AGE – TRACKING



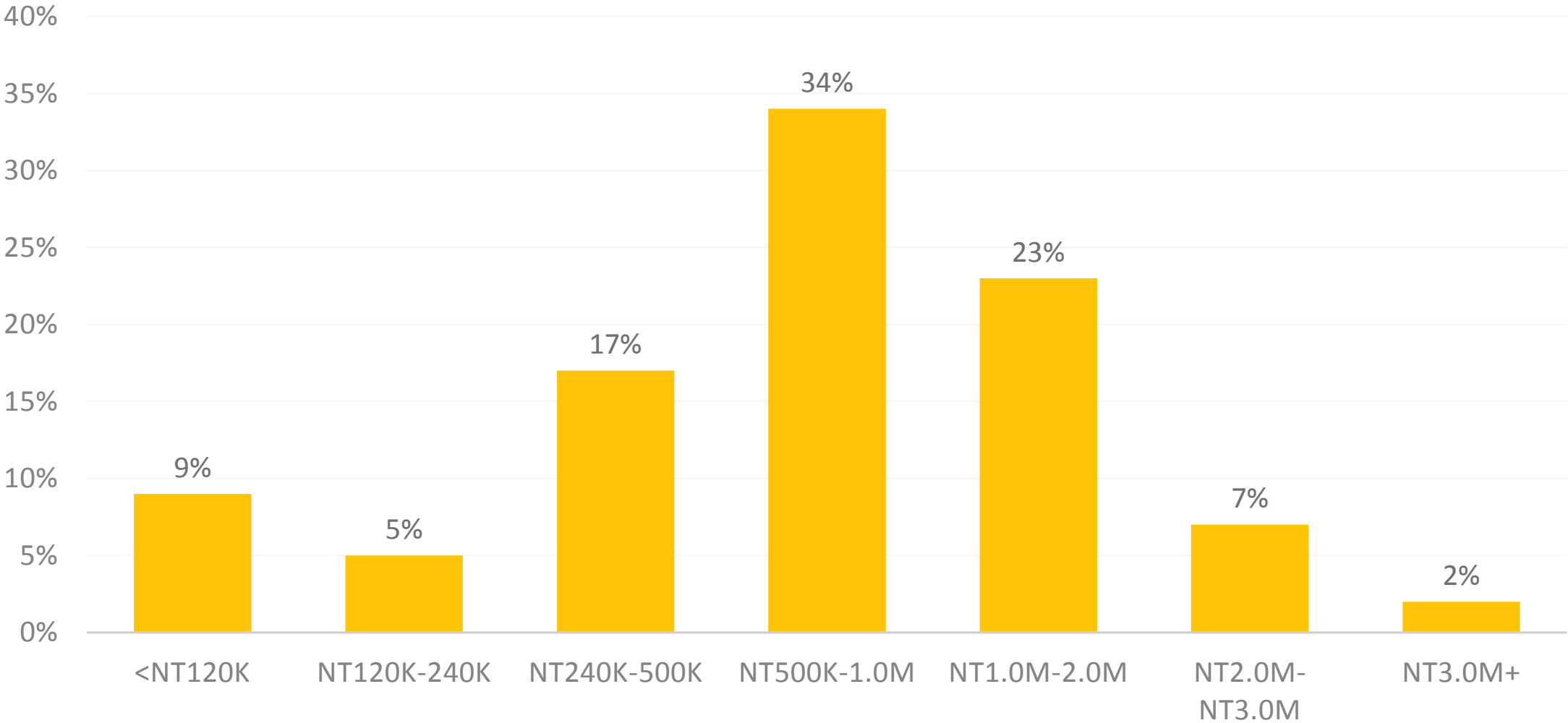
AGE – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
QF What was your age on your last birthday?

		TOTAL	SPORTS/ ADVENTURE	MICE	HONEYMOON	WEDDING
		-	-	-	-	-
QF	18-24	12%	10%			
	25-39	69%	73%	83%	92%	78%
	40-49	12%	11%		8%	11%
	50-59	6%	6%			11%
	60+	1%		17%		
	Total	151	101	6	12	9
QF	Mean	33.20	32.77	35.50	32.67	34.78
	Median	31	30	31	33	32

Prepared by Anthology Research

HOUSEHOLD INCOME



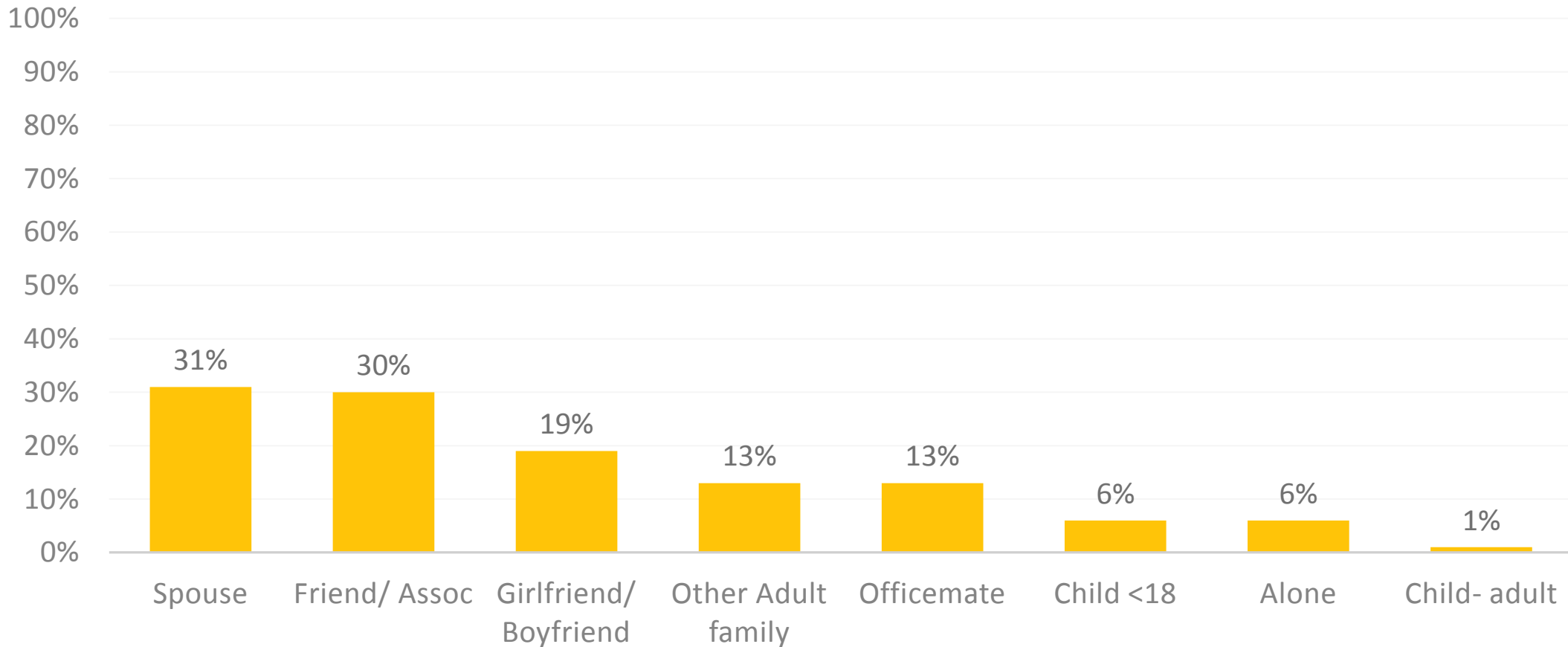
HOUSEHOLD INCOME – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
D2 What is your approximate annual household income, before taxes?

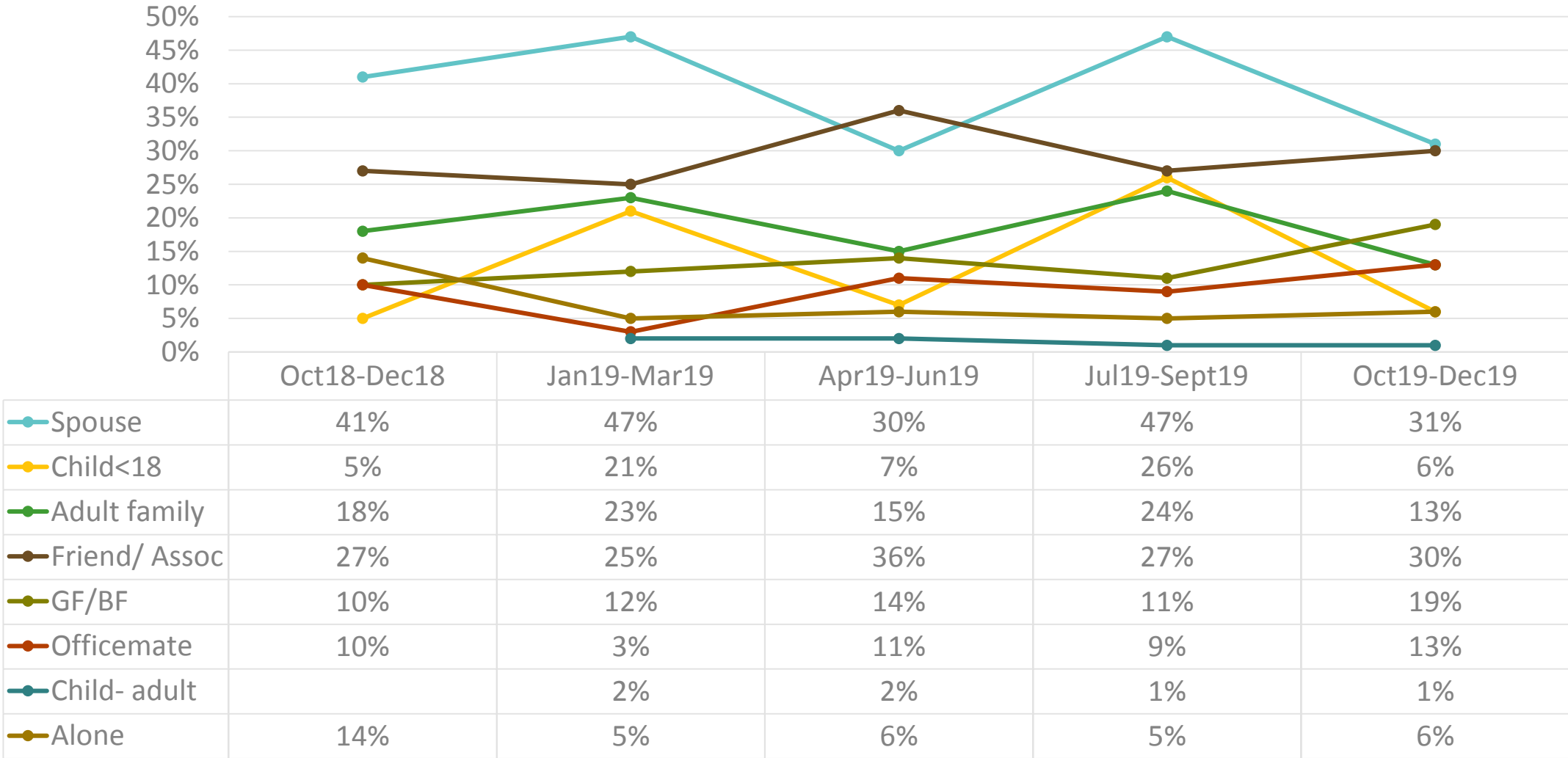
		TOTAL	SPORTS/ ADVENTURE	MICE	HONEYMOON	WEDDING
		-	-	-	-	-
D2	< NT120K	9%	9%		8%	
	NT120K-240K	5%	5%		17%	
	NT240K-500K	17%	16%	17%	25%	11%
	NT500K-1.0M	34%	39%	50%	25%	33%
	NT1.0M-2.0M	23%	21%	33%	25%	44%
	NT2.0M-3.0M	7%	5%			11%
	NT3.0M+	2%	2%			
	No income	4%	4%			
	Total	151	101	6	12	9

Prepared by Anthology Research

TRAVEL PARTY



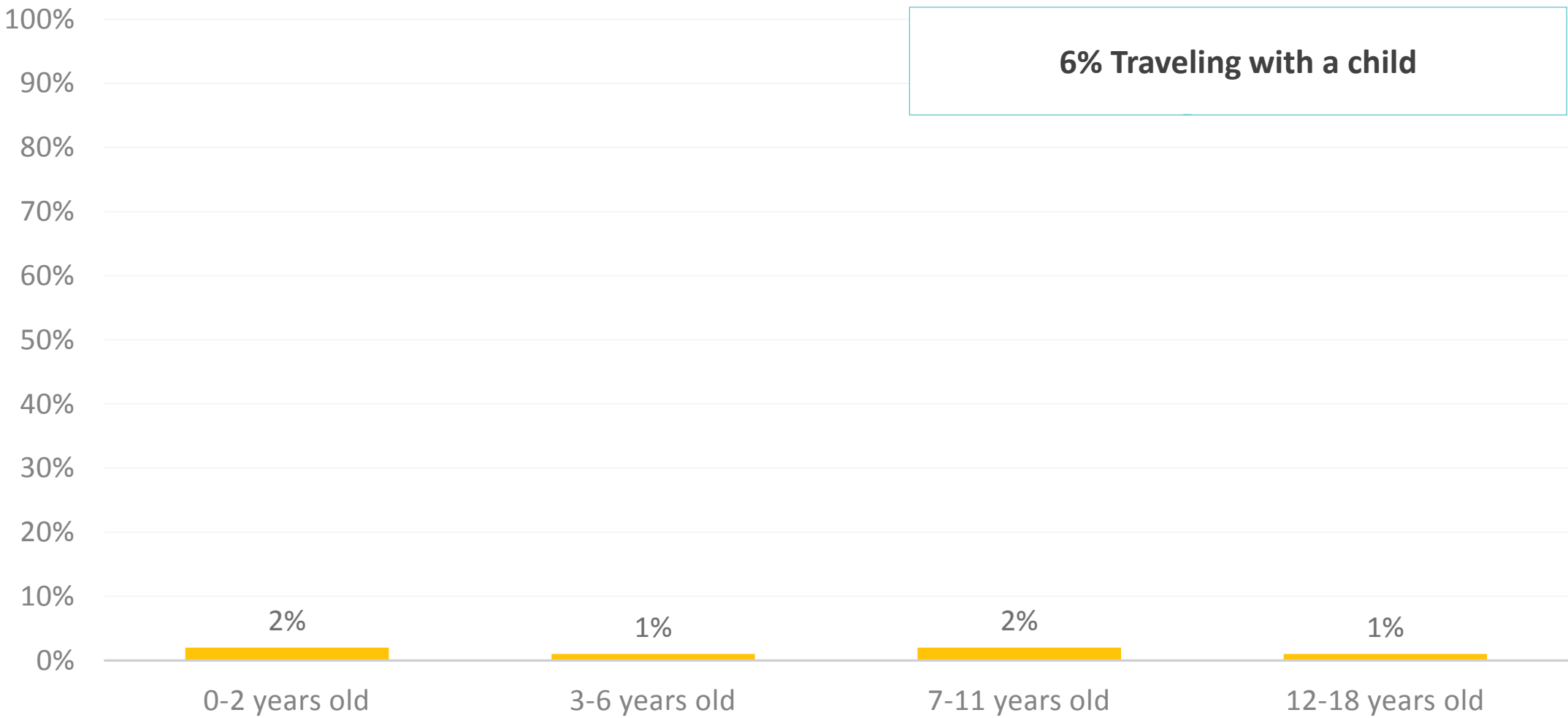
TRAVEL PARTY – TRACKING



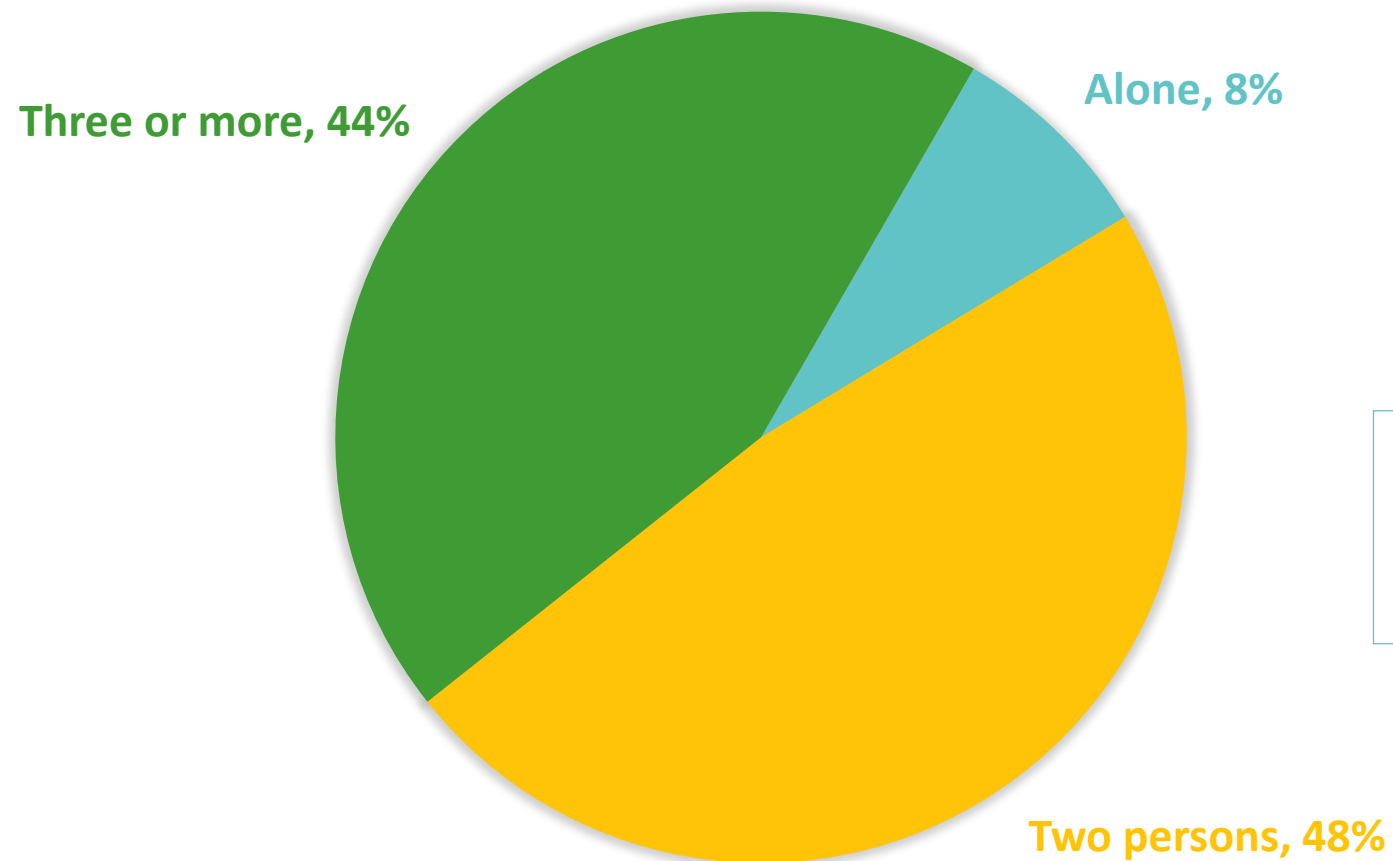
[A]



TRAVEL PARTY – CHILD UNDER 18

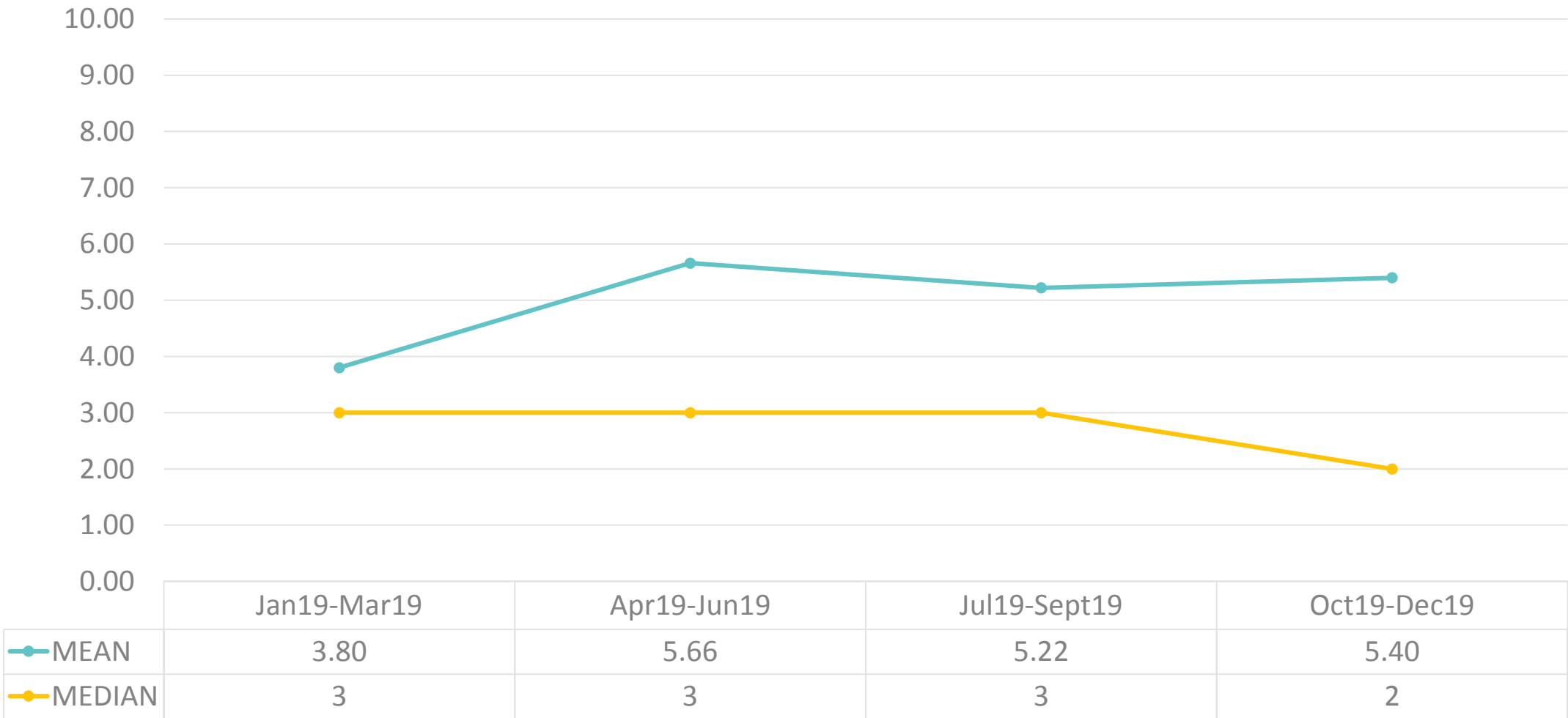


TRAVEL PARTY SIZE

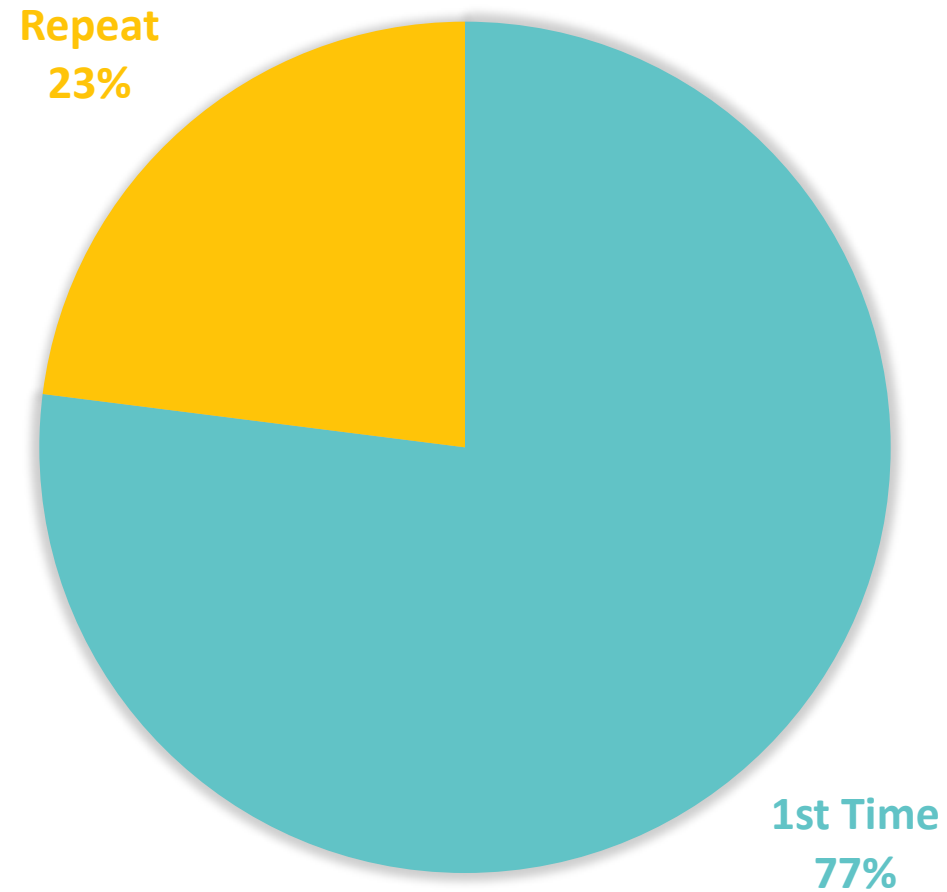


Mean = 5.40
Median = 2

TRAVEL PARTY SIZE – TRACKING

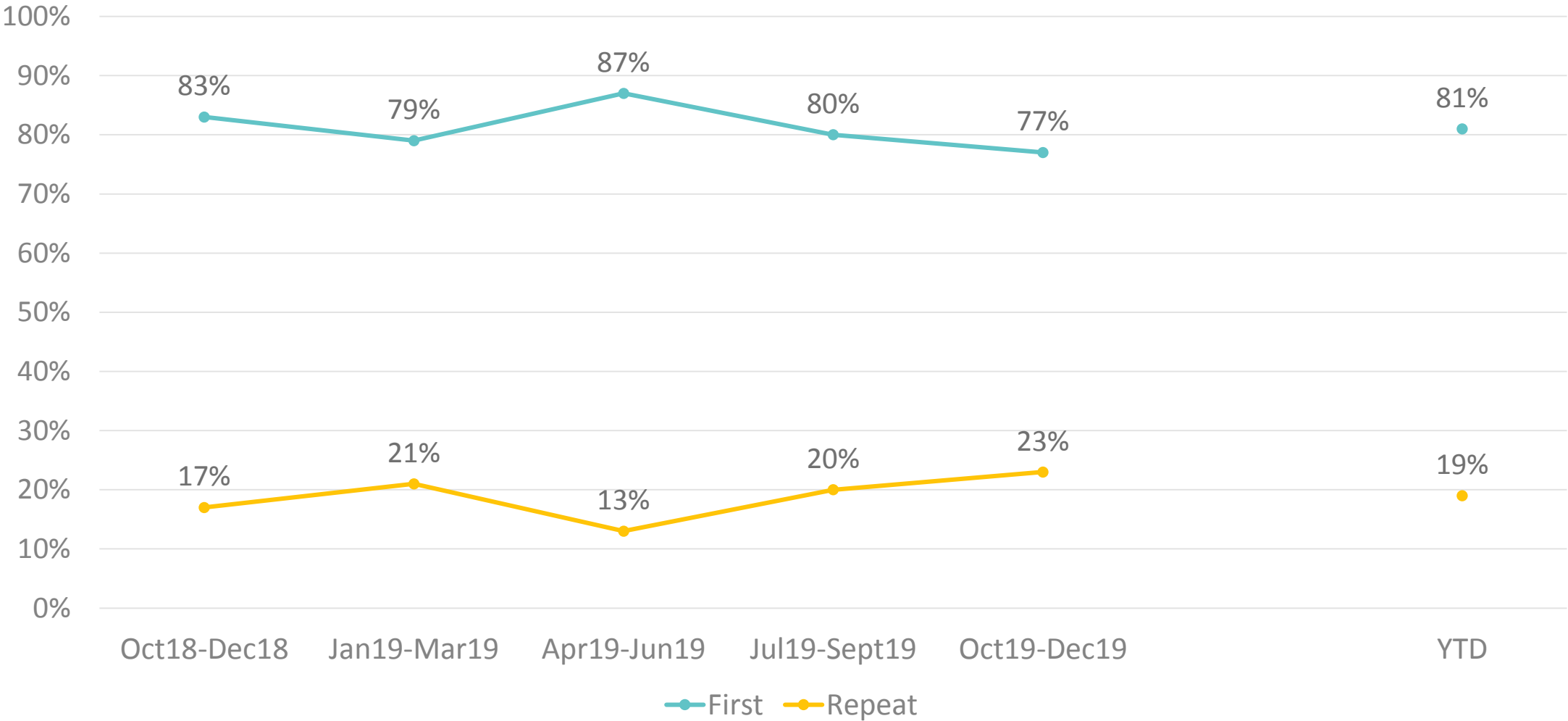


TRIPS TO GUAM



Mean = 1.45
Median = 1

TRIPS TO GUAM – TRACKING



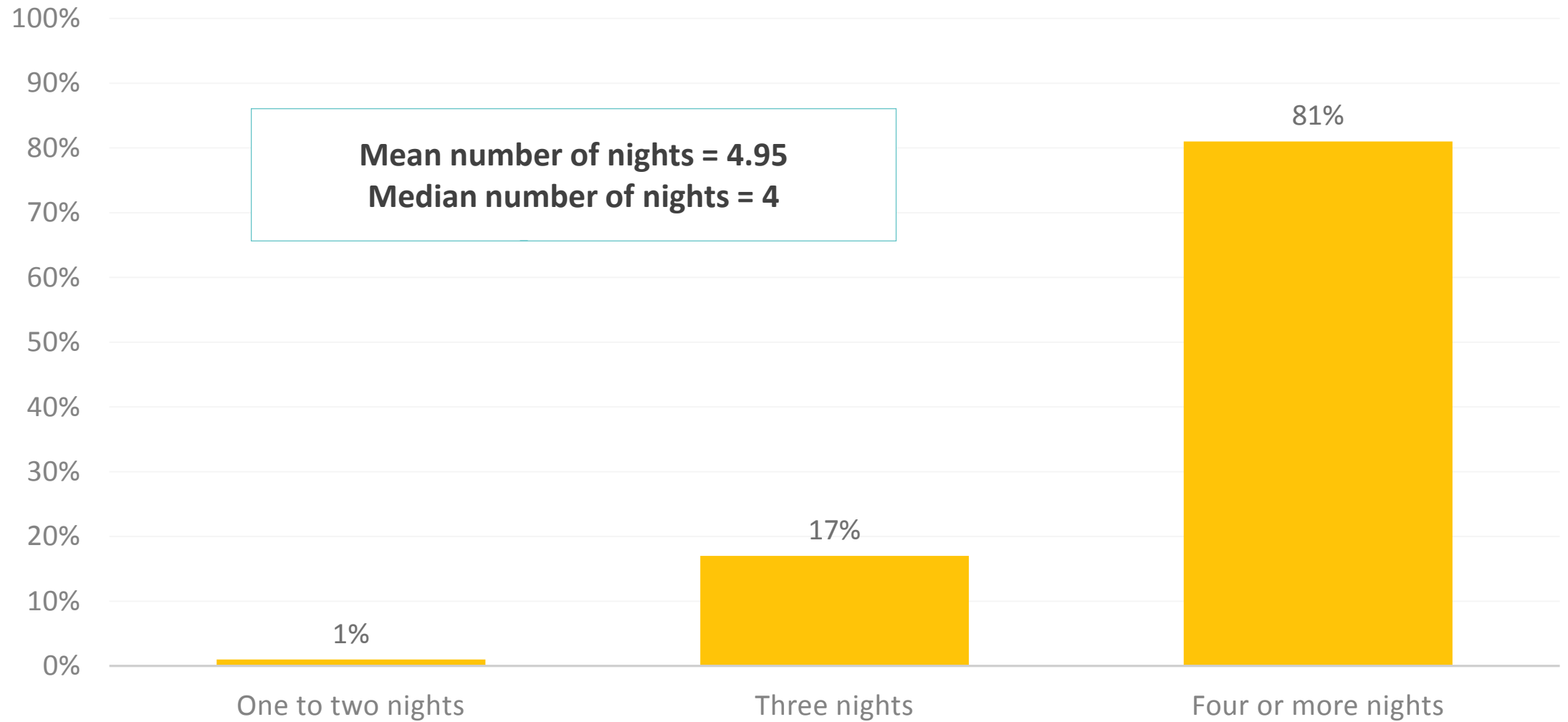
TRIPS TO GUAM – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
Q9 Including this trip, how many times have you been to Guam?

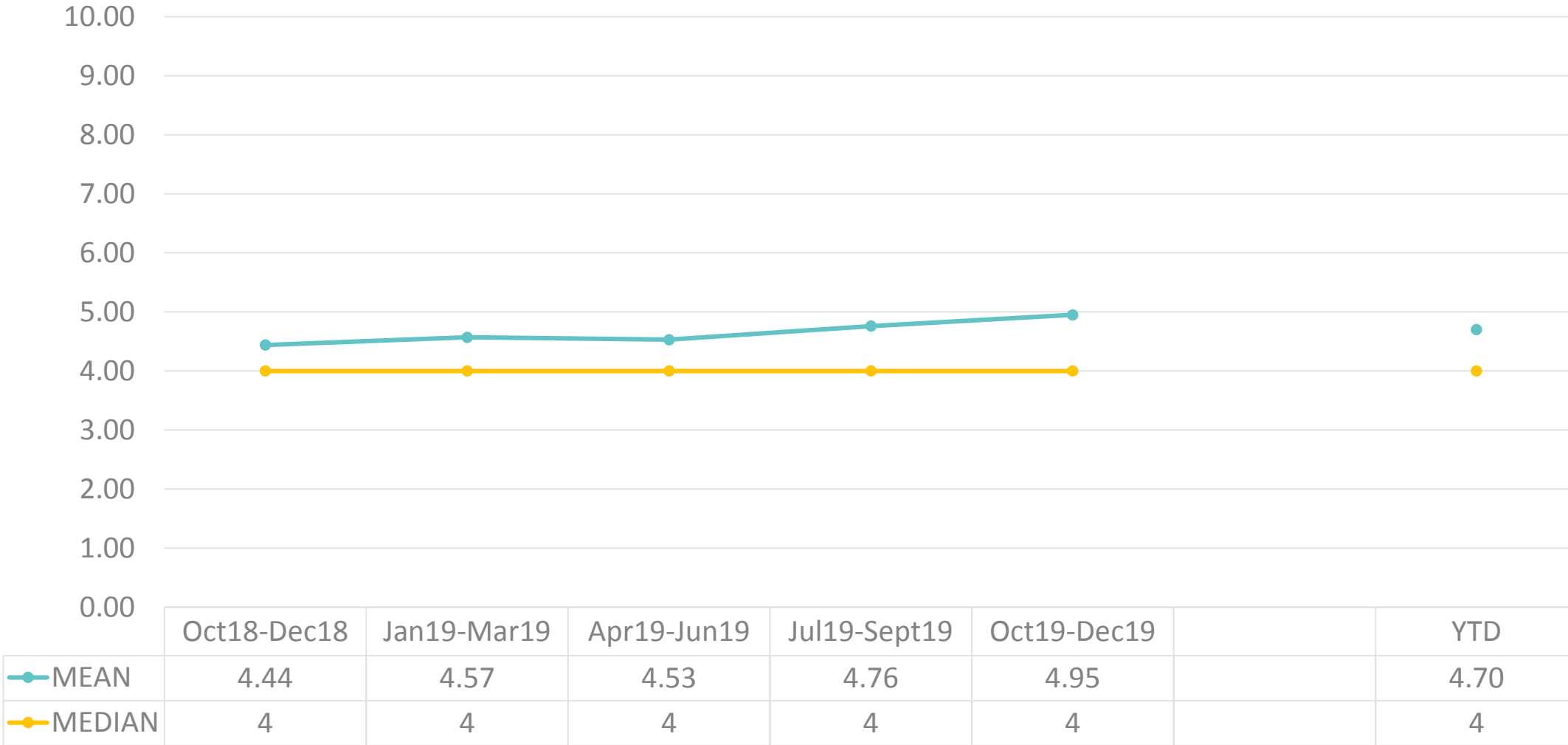
		TOTAL	SPORTS/ ADVENTURE	MICE	HONEYMOON	WEDDING
		-	-	-	-	-
Q9	1st time	77%	87%	100%	92%	78%
	Repeat	23%	13%		8%	22%
	Total	151	101	6	12	9
Q9	Mean	1.45	1.27	1.00	1.08	1.22
	Median	1	1	1	1	1

Prepared by Anthology Research

LENGTH OF STAY



LENGTH OF STAY – TRACKING



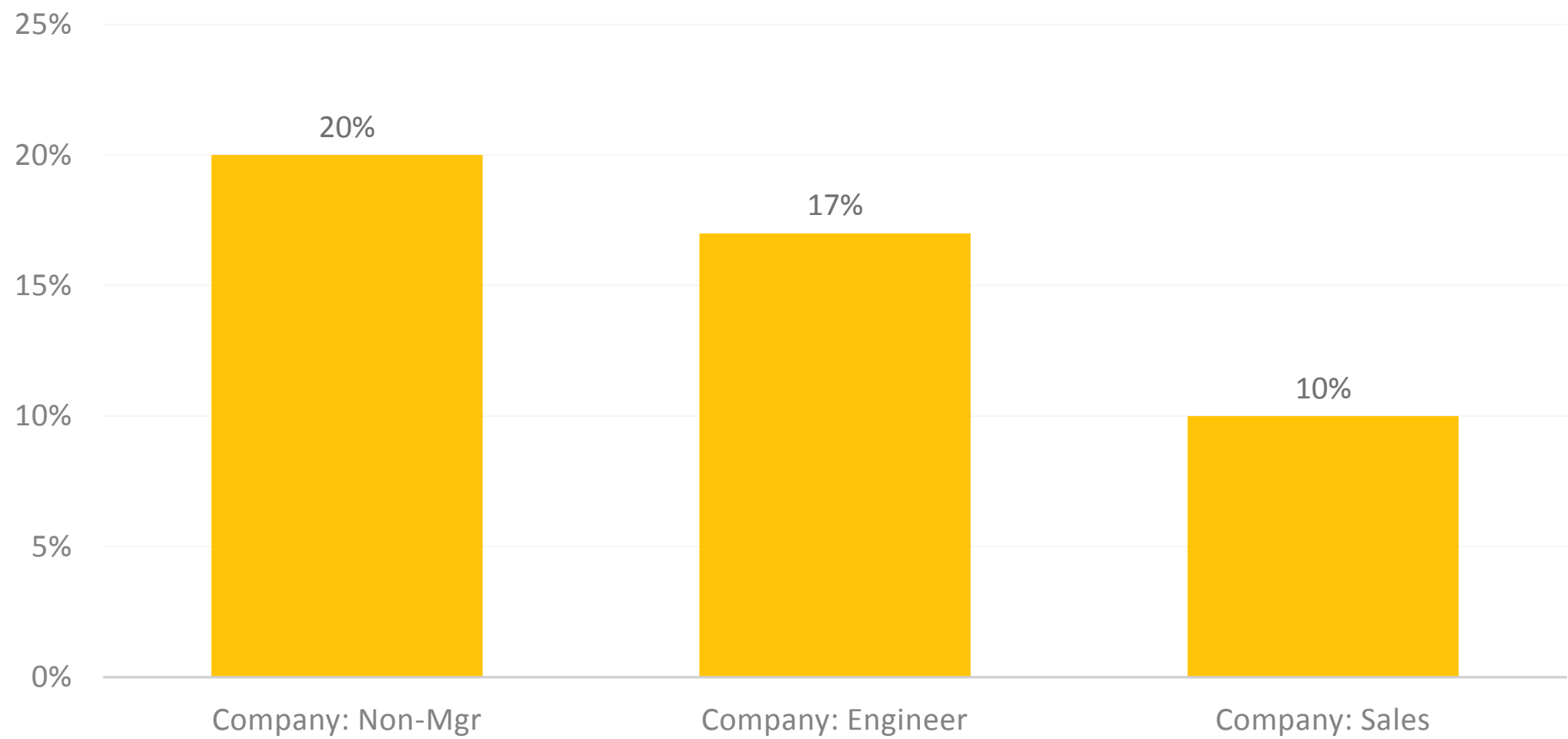
LENGTH OF STAY – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
SA How many nights did you stay on Guam?

		TOTAL	SPORTS/ ADVENTURE	MICE	HONEYMOON	WEDDING
		-	-	-	-	-
SA	1-2 nights	1%	1%		8%	11%
	3 nights	17%	14%		8%	22%
	4+	81%	85%	100%	83%	67%
	Total	151	101	6	12	9
SA	Mean	4.95	4.98	4.50	4.58	3.78
	Median	4	4	5	4	4

Prepared by Anthology Research

OCCUPATION – Top Responses (10%+)



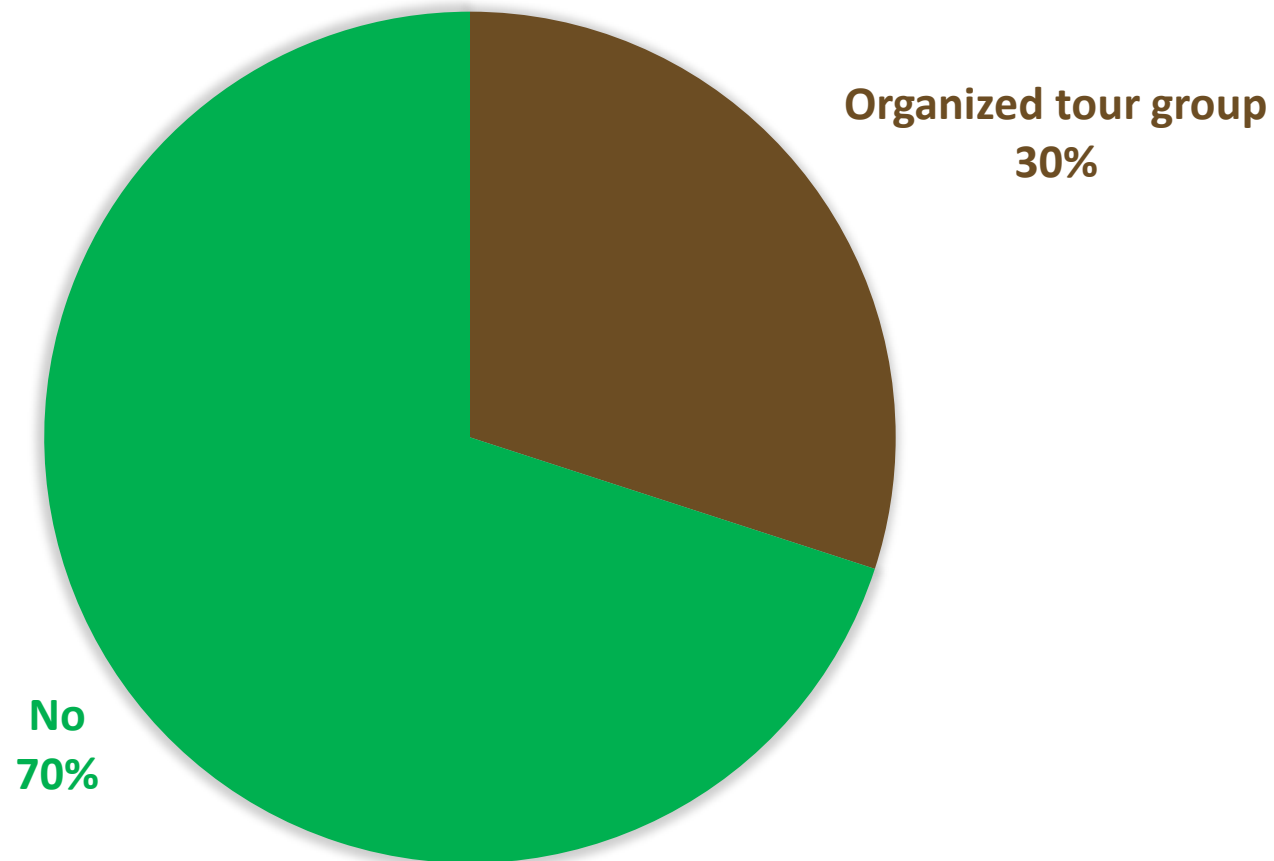


SECTION 2

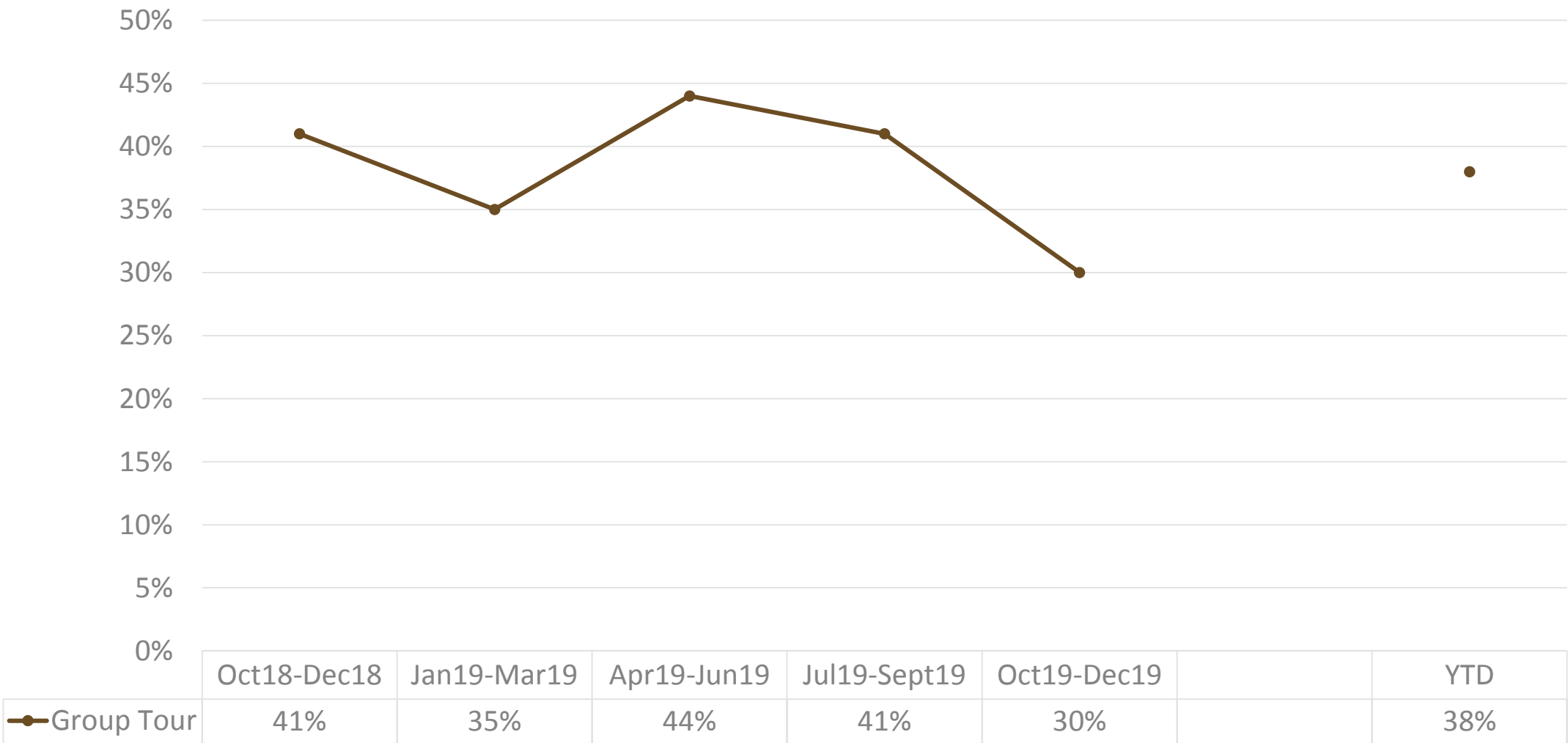
TRAVEL PLANNING



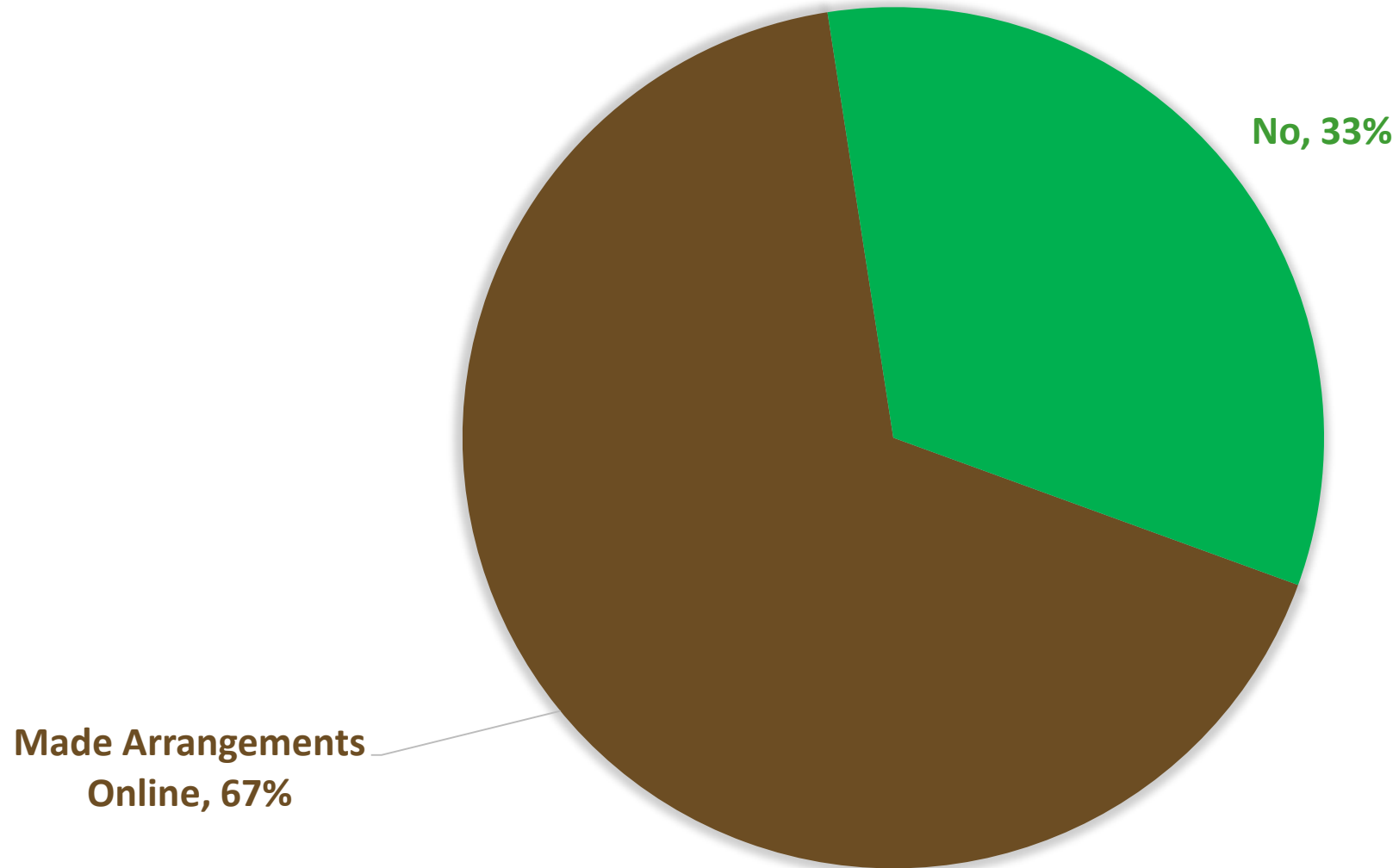
ORGANIZED TOUR GROUP



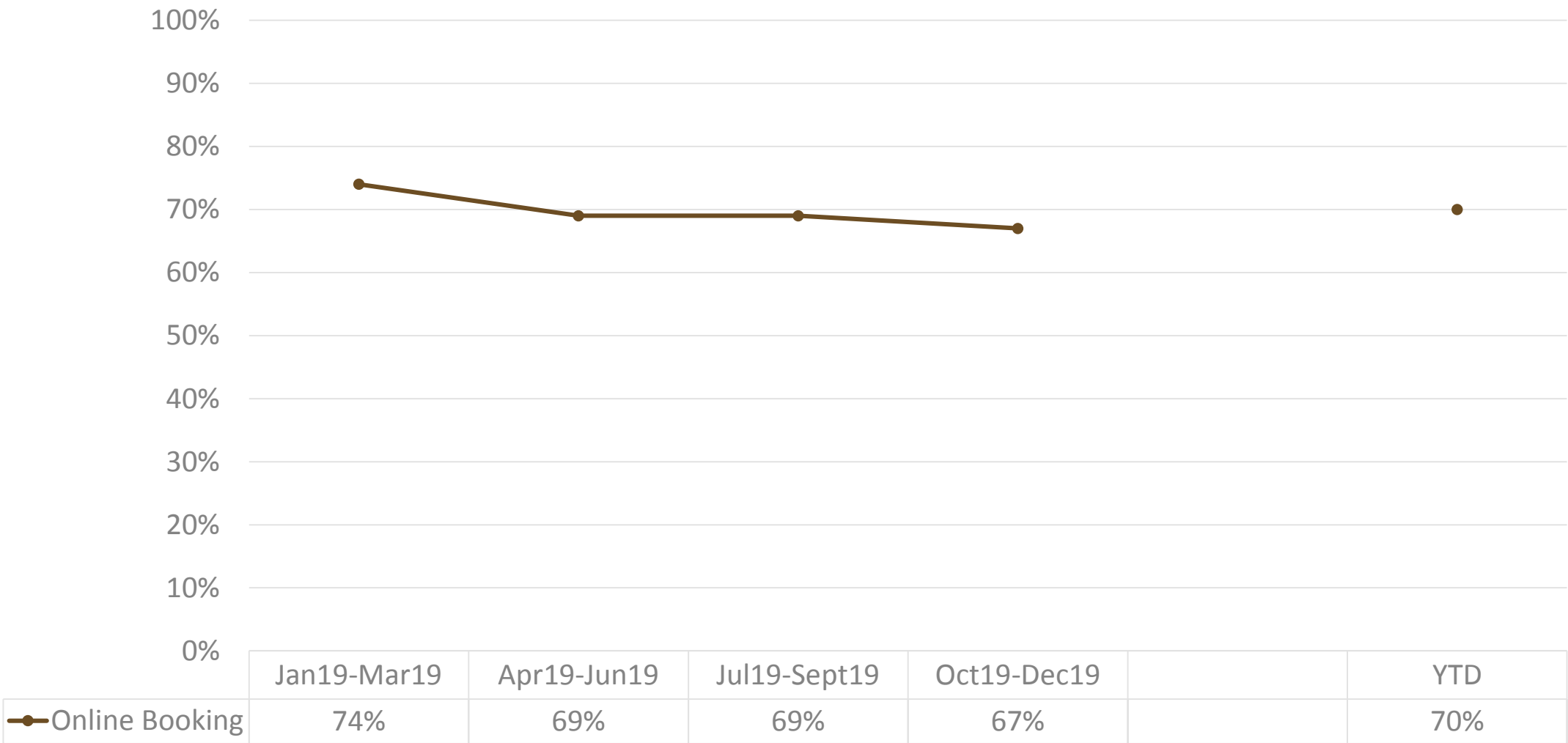
ORGANIZED TOUR GROUP – TRACKING



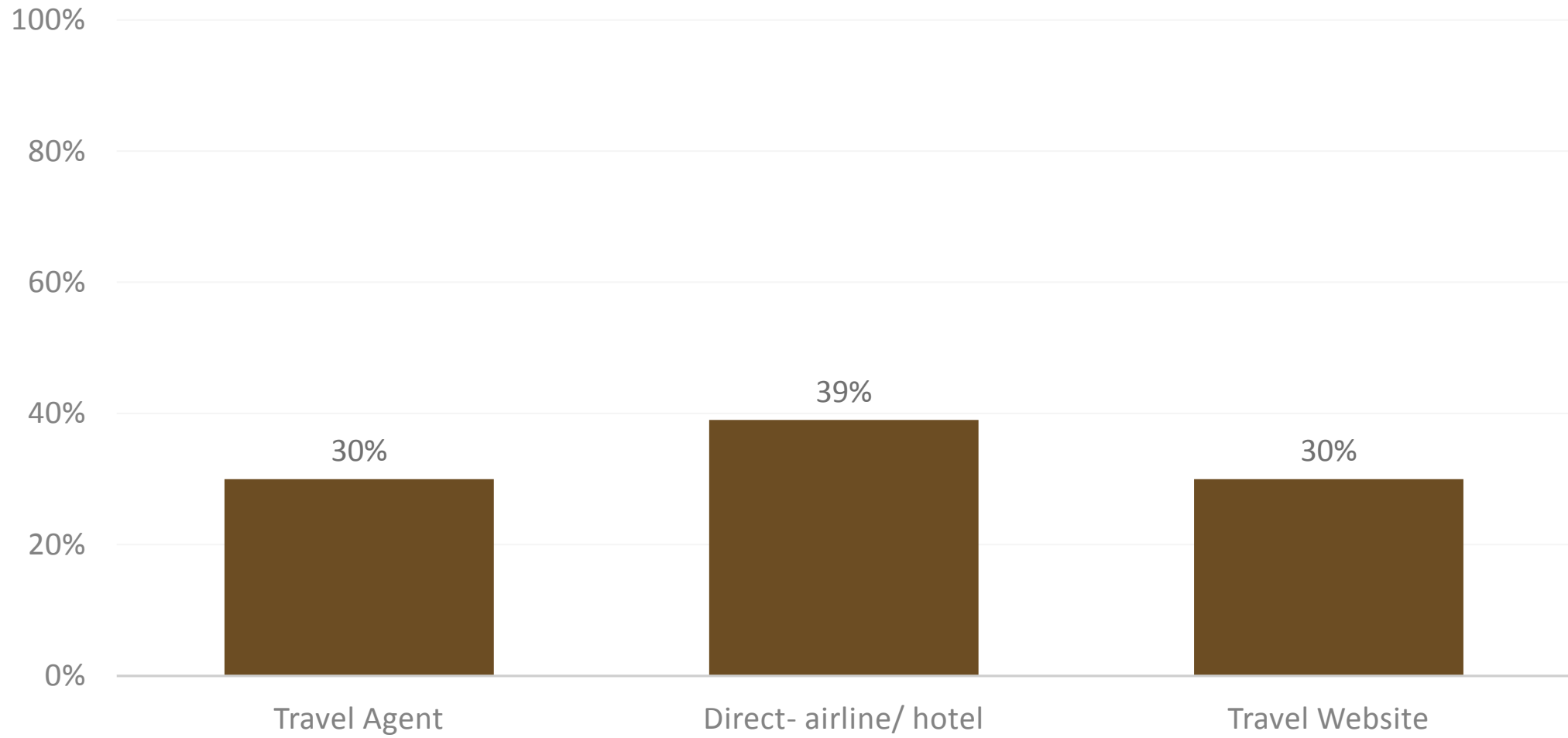
ONLINE BOOKING



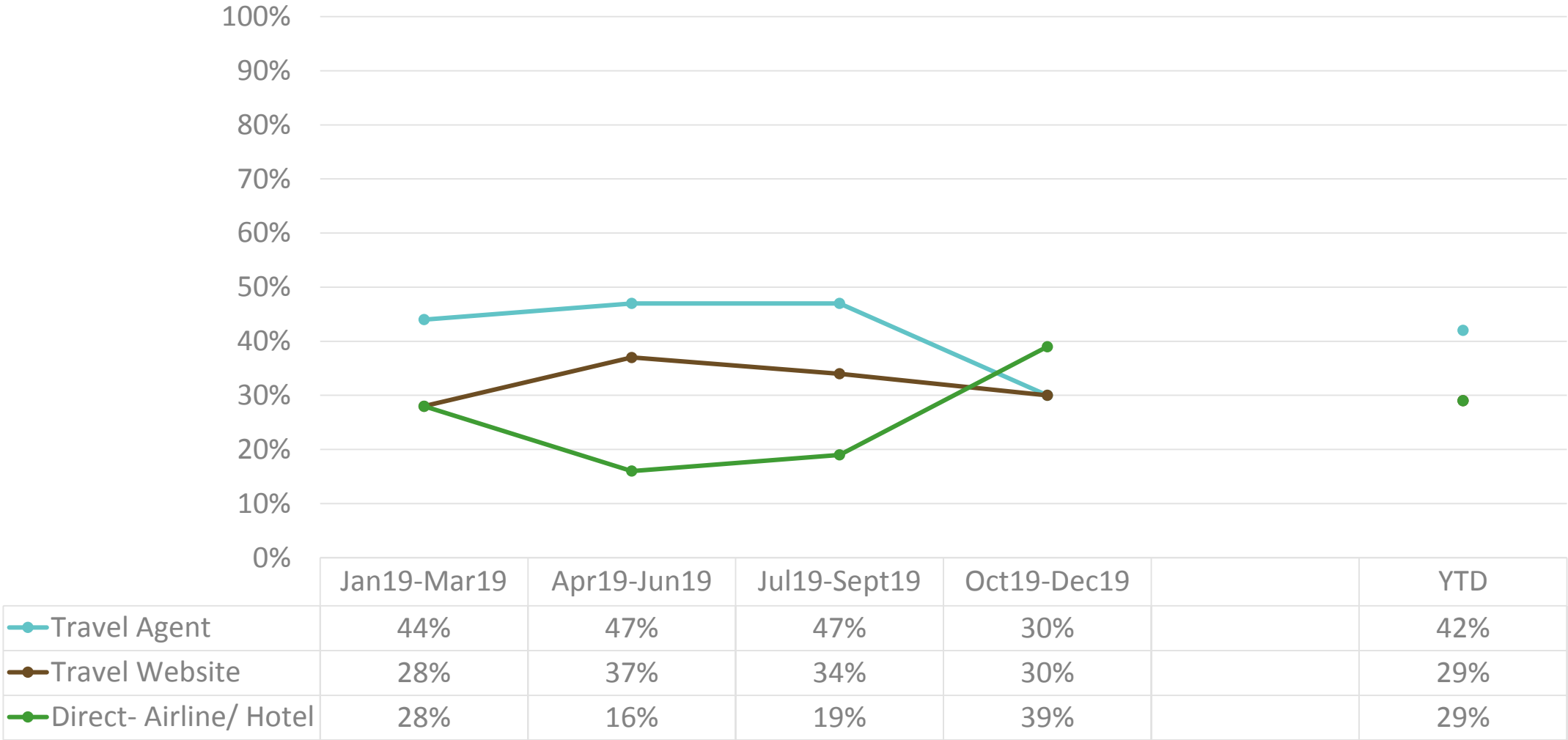
ONLINE BOOKING – TRACKING



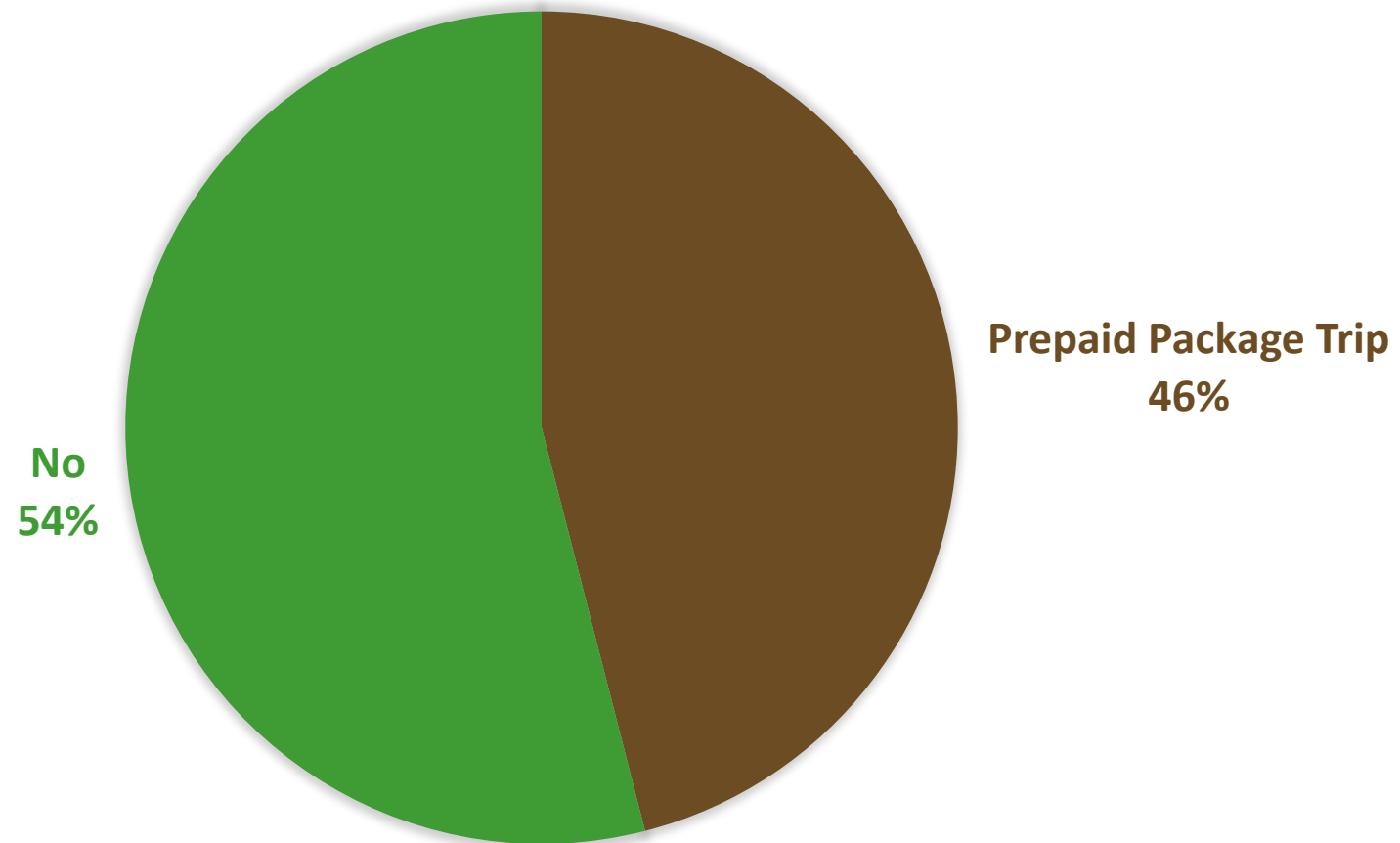
TRAVEL ARRANGEMENTS



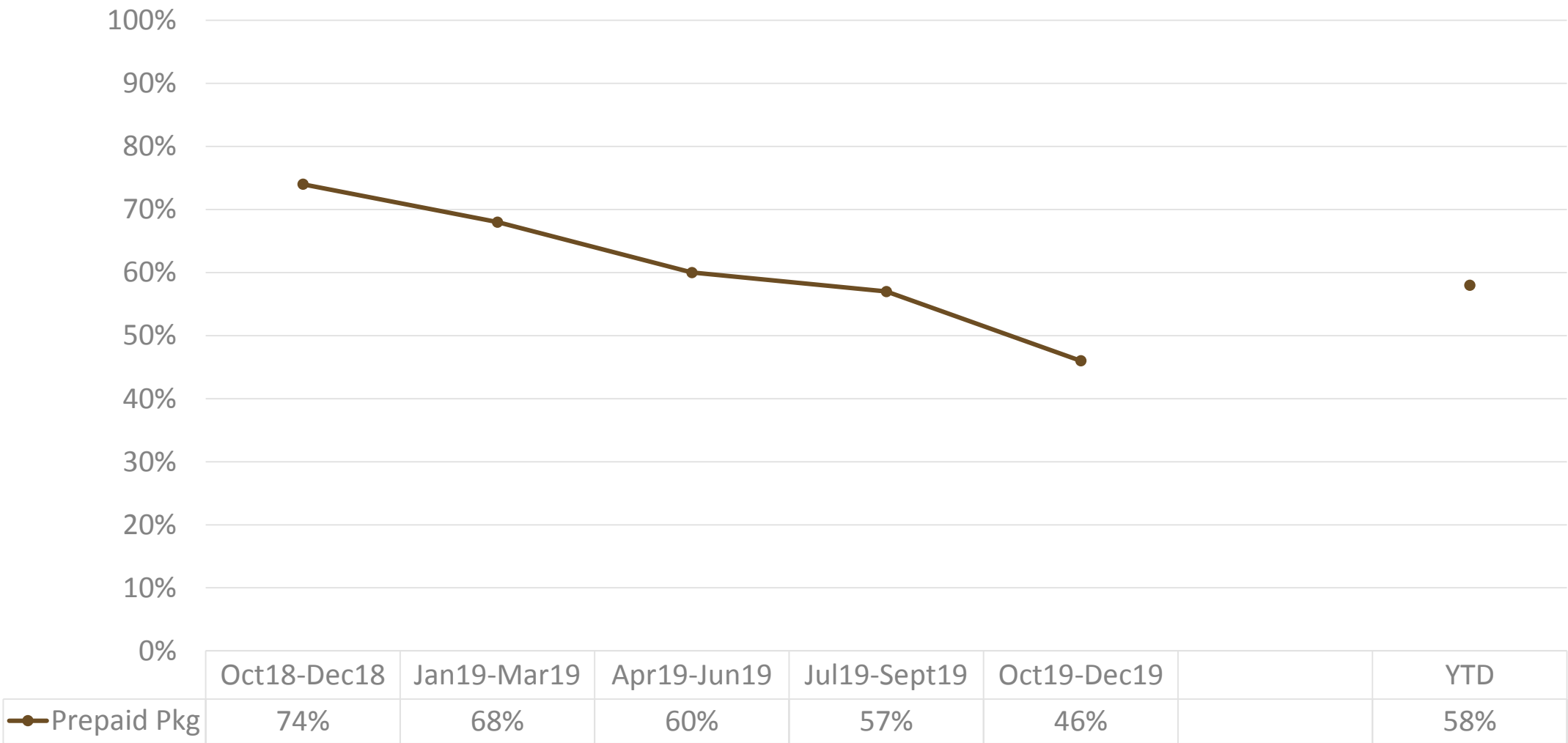
TRAVEL ARRANGEMENTS – TRACKING



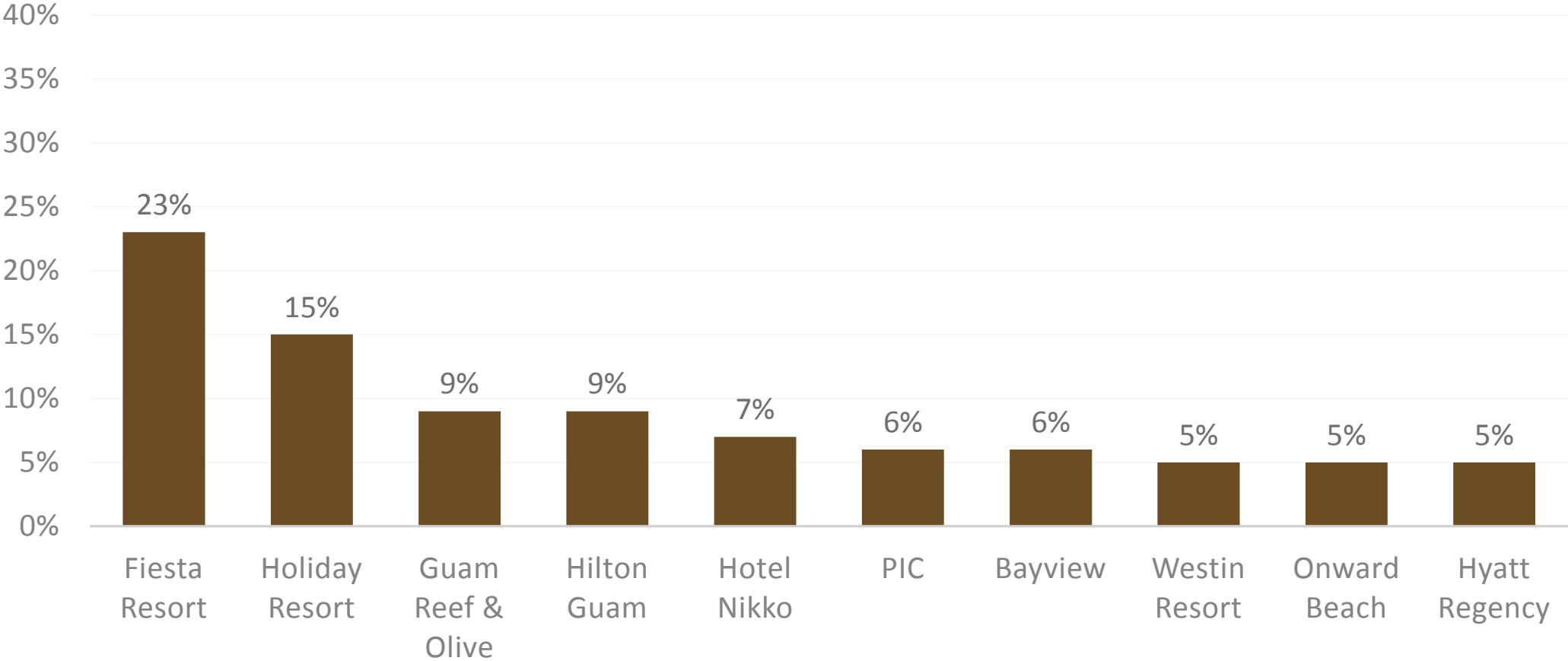
PREPAID PACKAGE TRIP



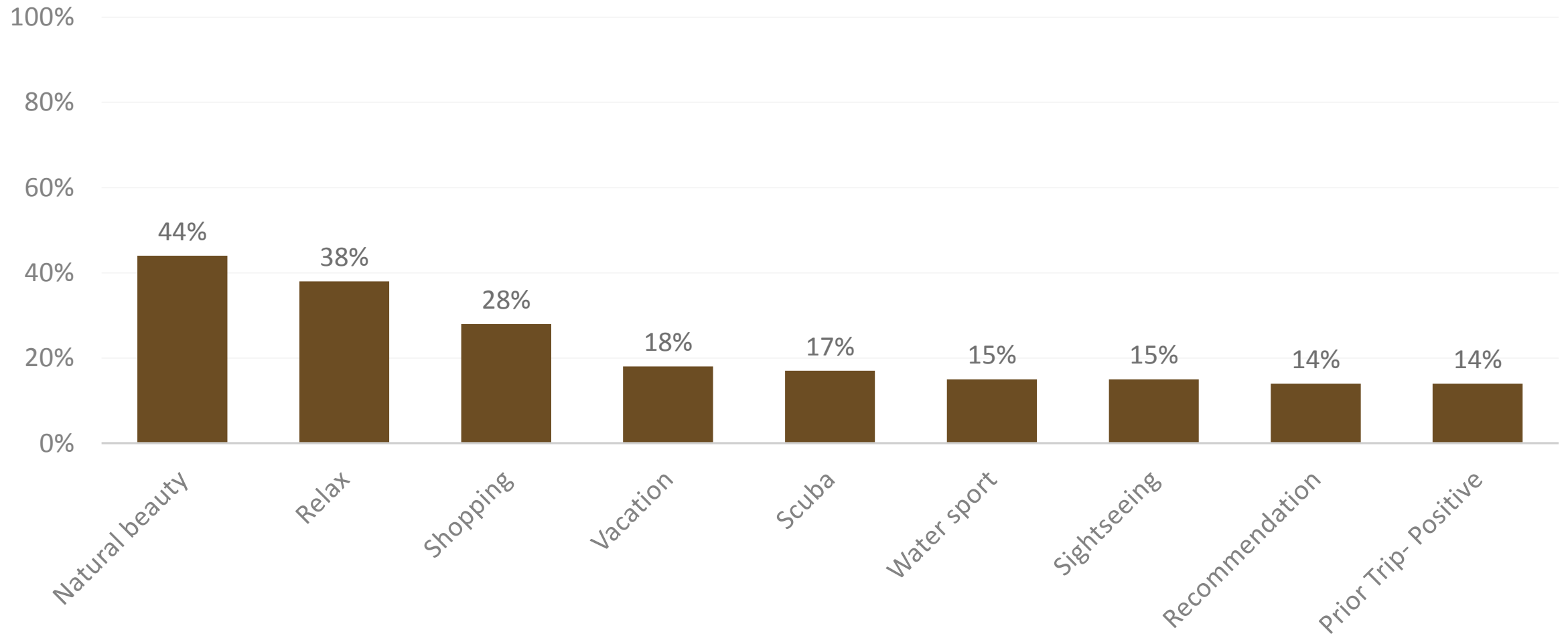
PREPAID PACKAGE TRIP



ACCOMMODATIONS (5%+)



TRAVEL MOTIVATIONS (10%+)



TRAVEL MOTIVATIONS – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
Q8 What top three reasons motivated you to travel to Guam on this trip?

		TOTAL	SPORTS/ ADVENTURE	MICE	HONEYMOON	WEDDING
		-	-	-	-	-
Q8	Beautiful seas, beaches, tropical climate	44%	46%	33%	33%	33%
	Just to relax	38%	39%	33%	17%	
	Shopping	28%	25%		17%	22%
	Vacation	18%	18%			11%
	Scuba diving	17%	26%	33%	8%	11%
	Water sports (snorkeling, windsurfing, parasailing)	15%	23%		17%	11%
	Sightseeing/ visiting tourist spots	15%	15%	17%	17%	
	A previous visit	14%	10%		8%	22%
	Recommendation of friend/ relative/ travel agency	14%	15%	17%	17%	
	It is a safe place to spend a vacation	9%	6%			
	Honeymoon	8%	11%		100%	22%
	Shop Guam e-Festival	8%	9%			
	Career certification/ testing	7%	2%			
	To Get Married/ attend Wedding	6%	8%		17%	100%
	Short travel time (not too far from home)	5%	6%		8%	
	Price of the tour package	5%	4%			
	Incentive trip	4%	4%	100%		
	Adventure	3%	3%			
	Company/ business trip	2%	2%			
	To visit friends or relatives	1%	1%			
	Organized sporting activity/ event	1%	2%			
	Travel shows/ agents	1%	1%	17%		
	Social Media networks	1%	1%			
	Total	151	101	6	12	9

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SECTION 3

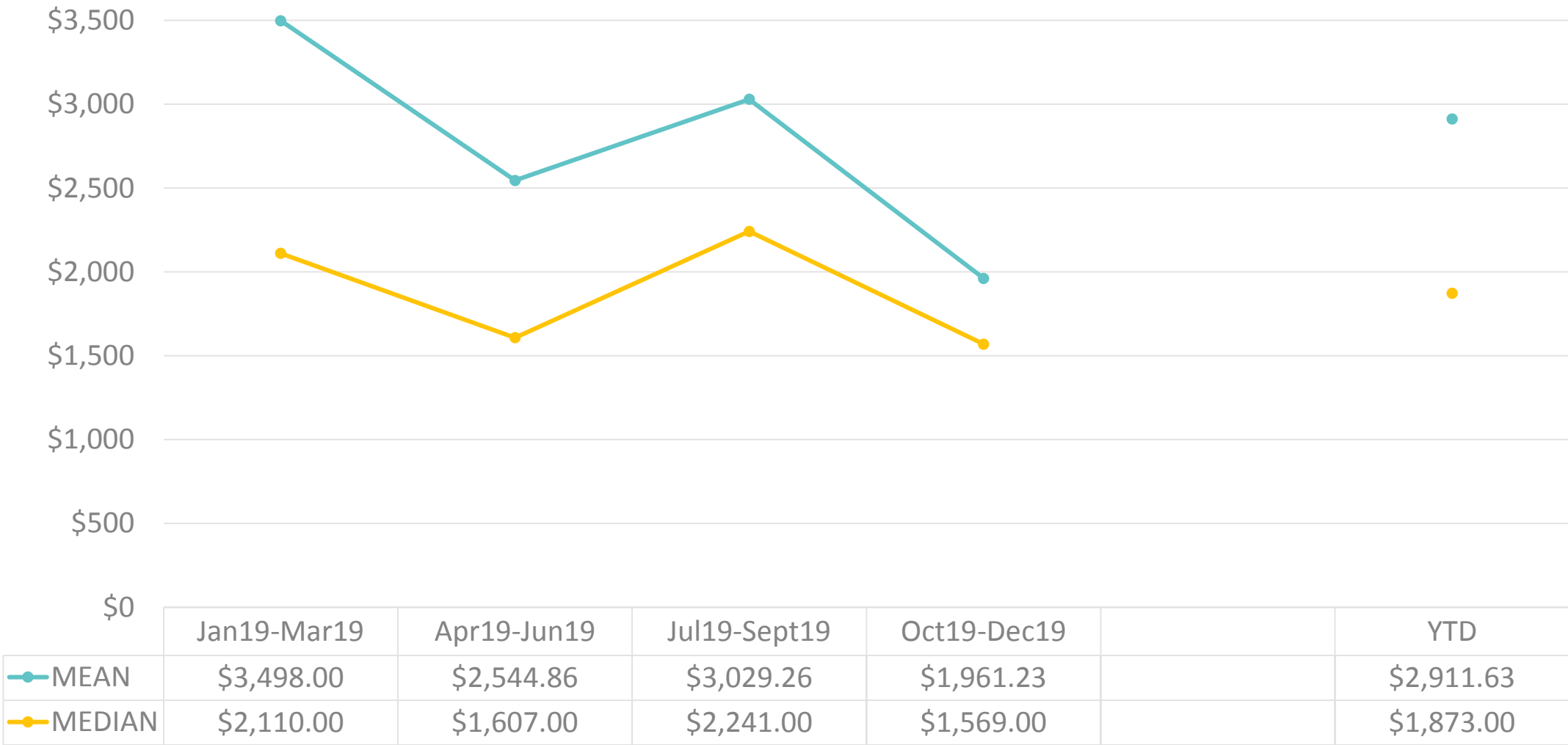
EXPENDITURES



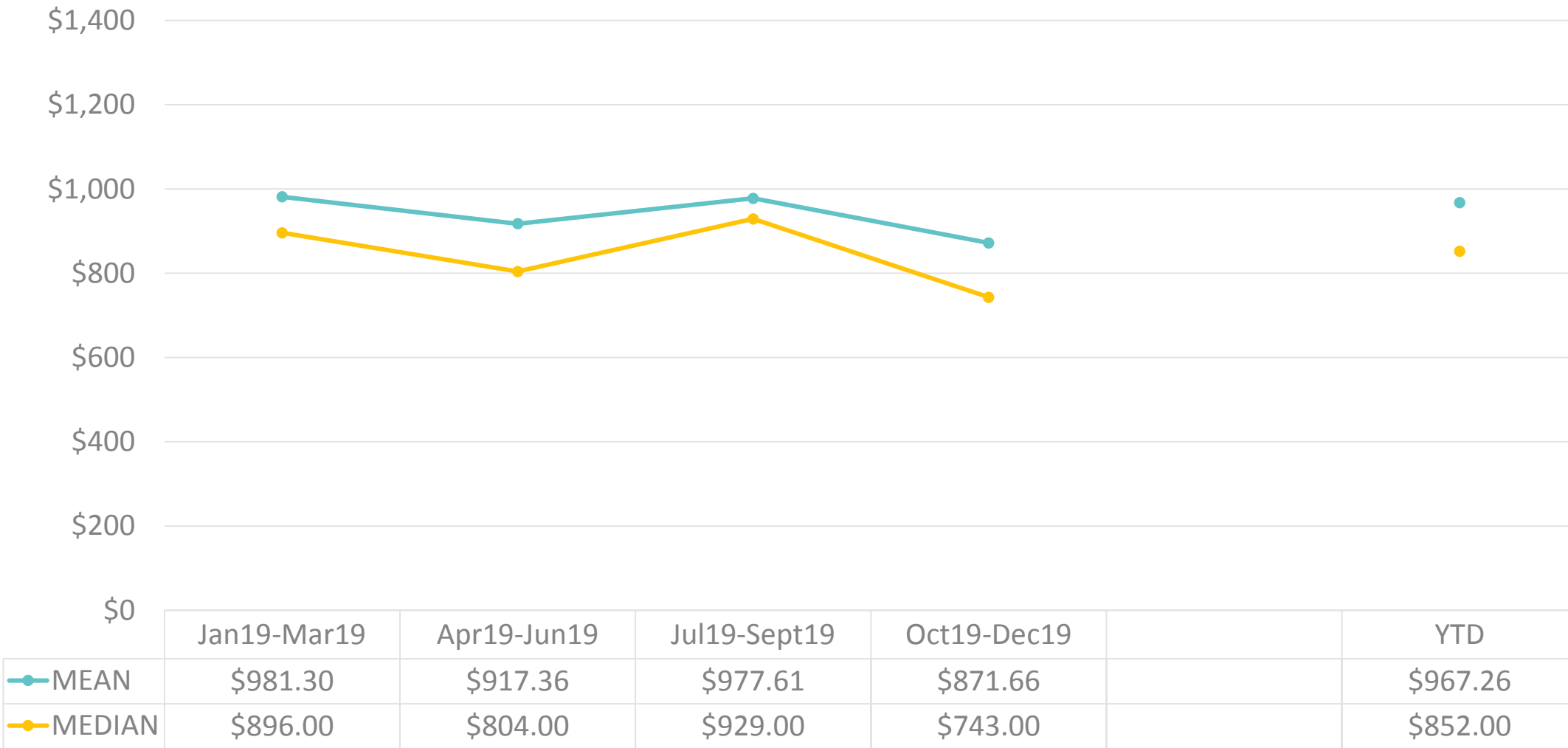
PREPAID PACKAGE EXPENDITURES

- \$1,961.23 = overall mean average prepaid package expense (for entire travel party) by respondent
- \$871.66= overall mean average **per person** prepaid package expenditures

PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING



PREPAID PACKAGE – PER PERSON EXPENSE TRACKING



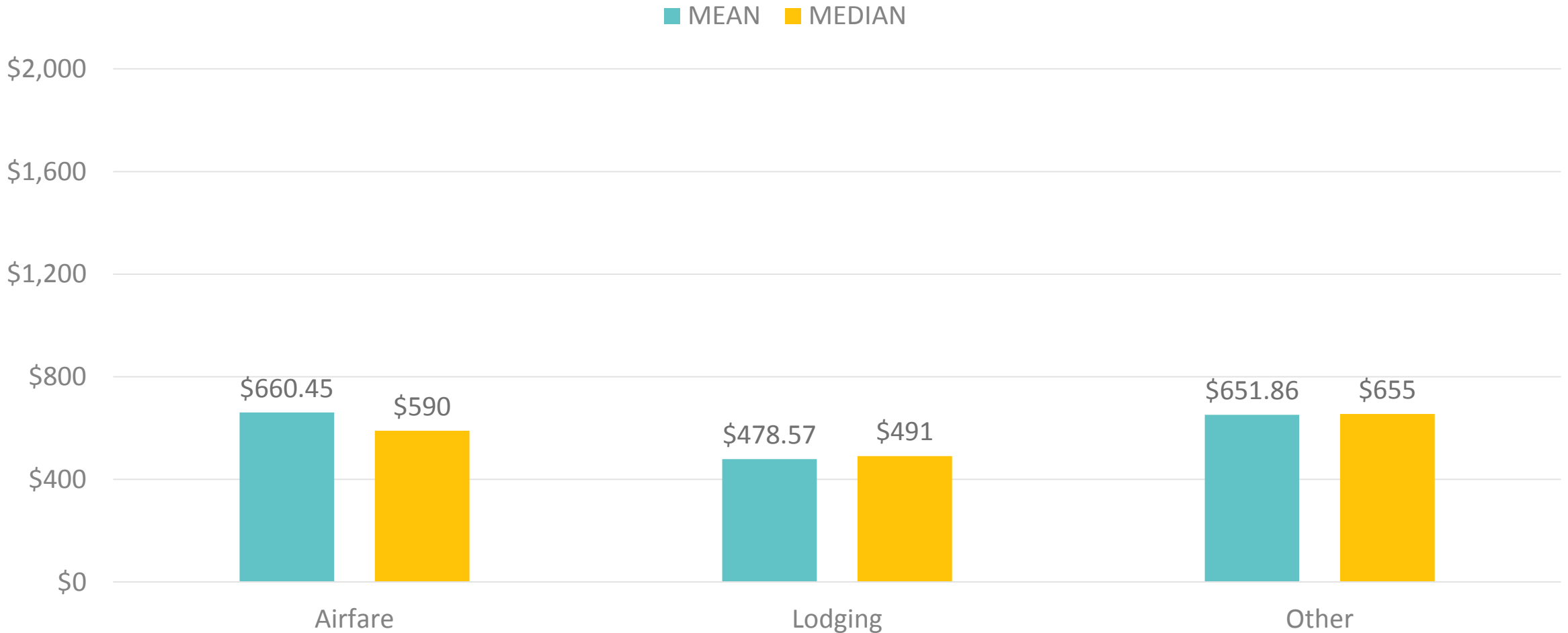
PREPAID PACKAGE – PER PERSON EXPENSE SEGMENTATION

GVB VISITOR SATISFACTION STUDY
Q20 How much did the total prepaid package trip cost for you and other members of your covered travel party? PER PERSON

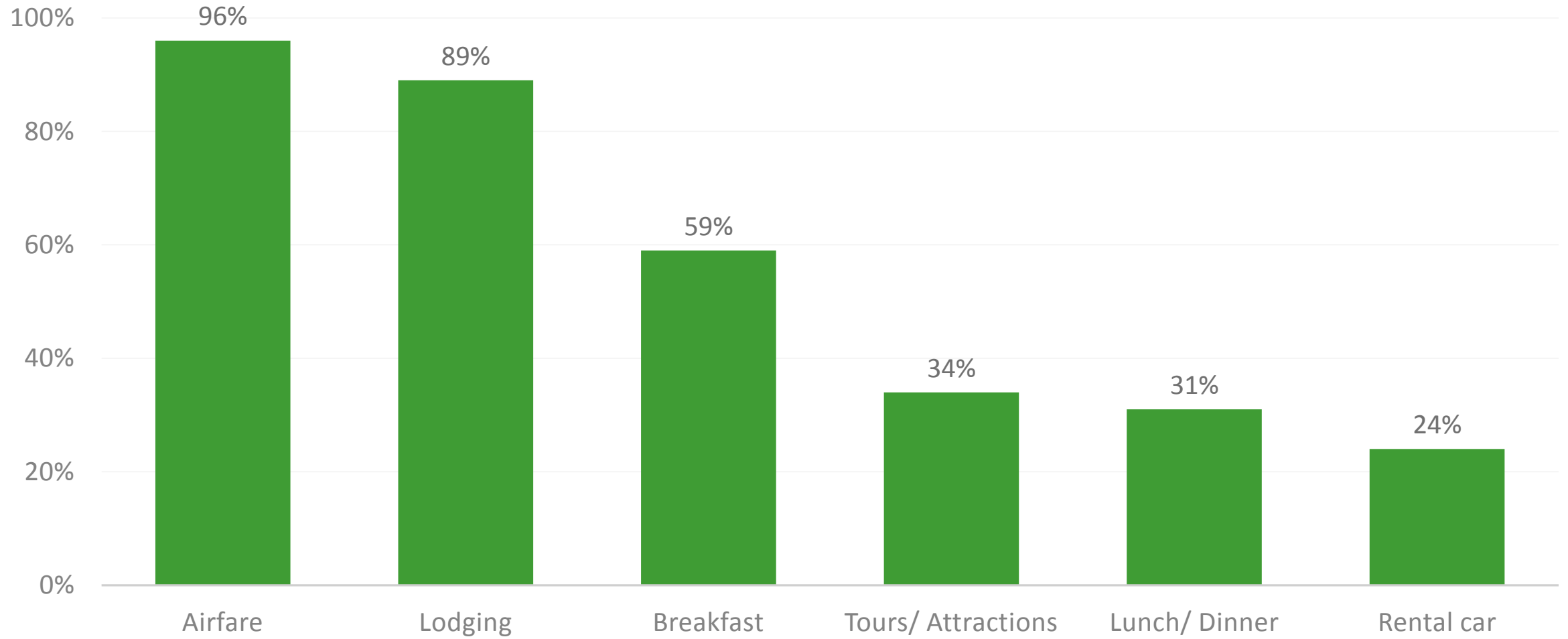
		TOTAL	SPORTS/ ADVENTURE	MICE	HONEYMOON	WEDDING
		-	-	-	-	-
PREPAID PKG PER PERSON	Mean	\$871.66	\$939.26	\$28.00	\$859.52	\$962.21
	Median	\$743	\$819	\$28	\$743	\$876

Prepared by Anthology Research

PREPAID PACKAGE – BREAKDOWN



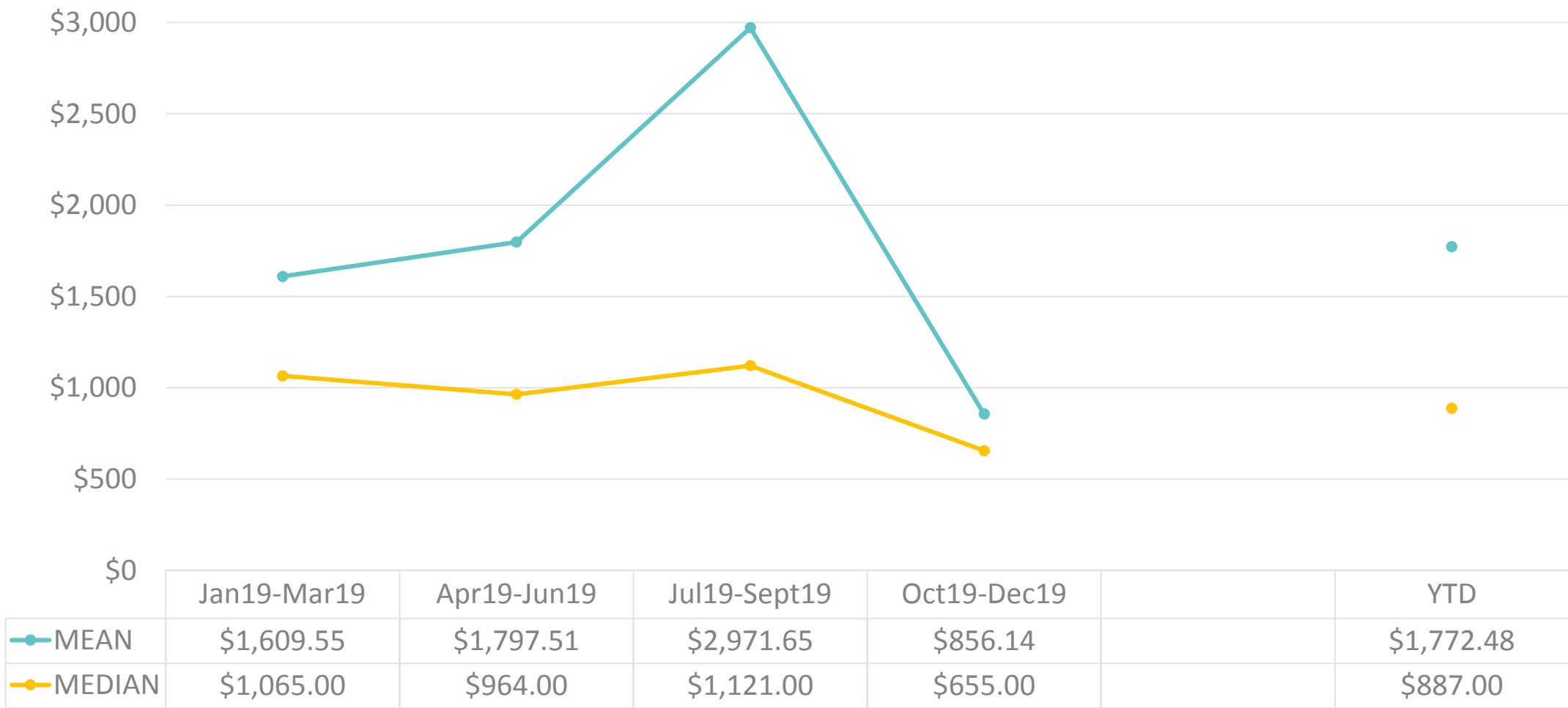
PREPAID PACKAGE – BREAKDOWN



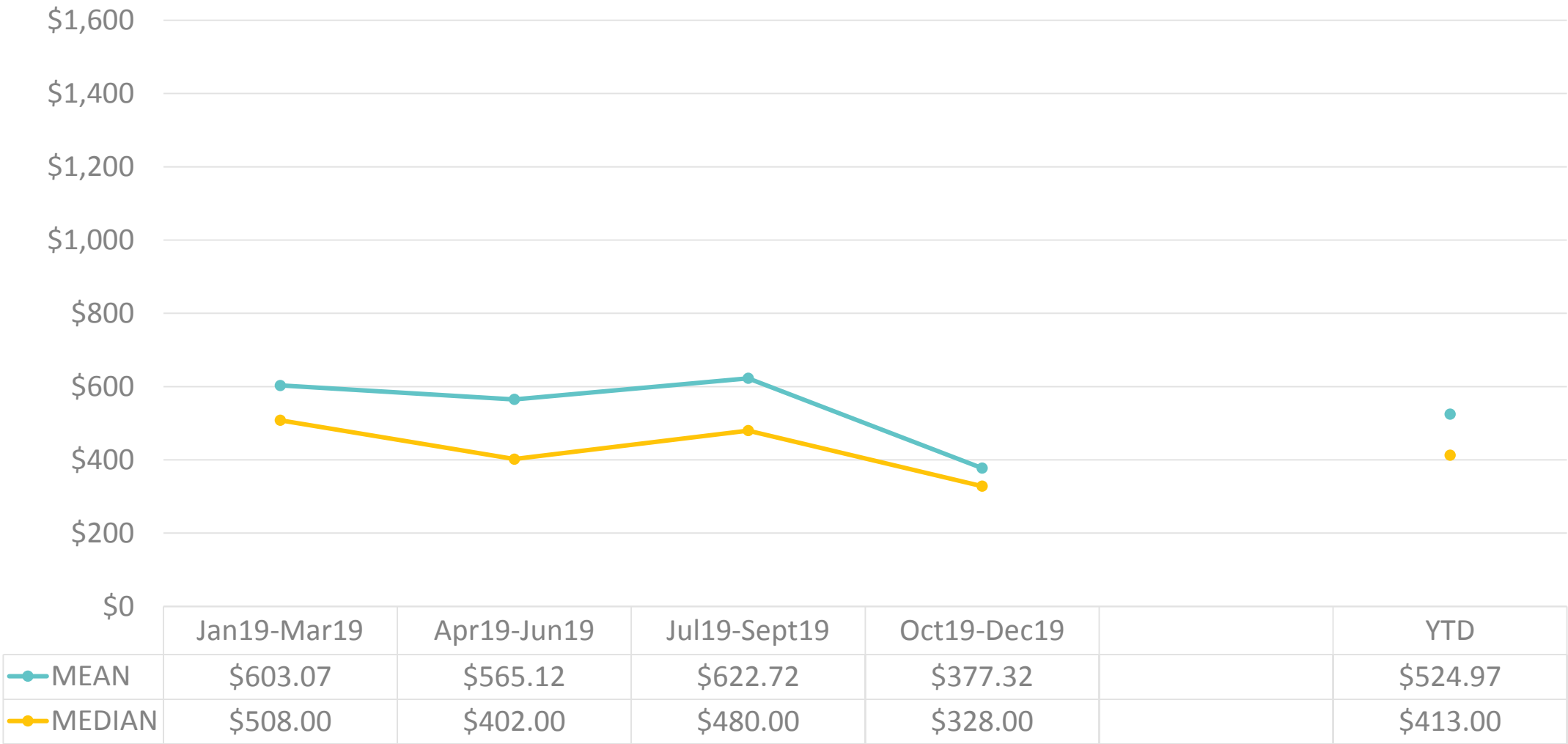
AIRFARE – FIT TRAVELER

- \$856.14 = overall mean average airfare expense (for entire travel party) by respondent
- \$377.32 = overall mean average **per person** airfare expenditures

AIRFARE – FIT TRAVELER (GROUP) TRACKING



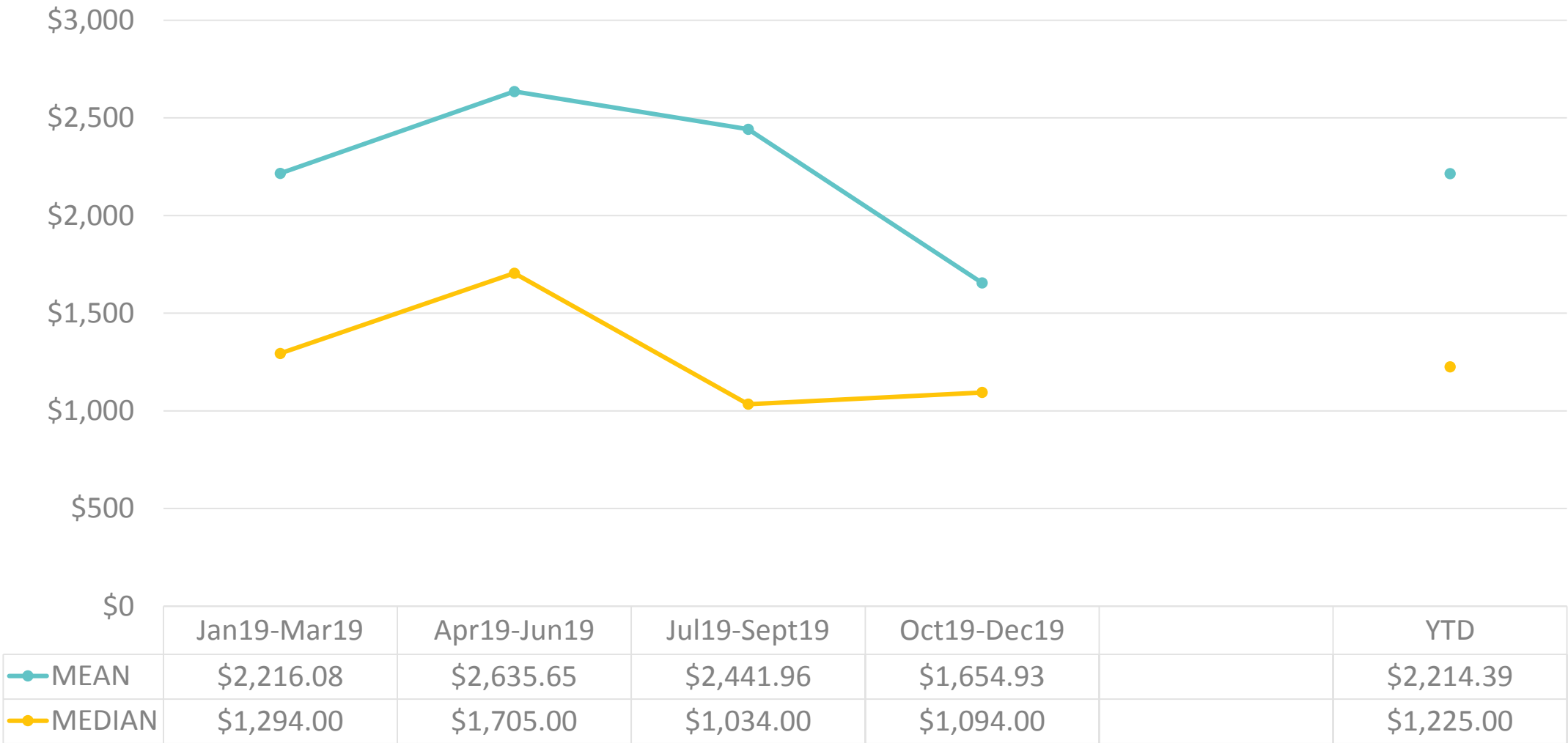
AIRFARE – FIT TRAVELER (Per Person) TRACKING



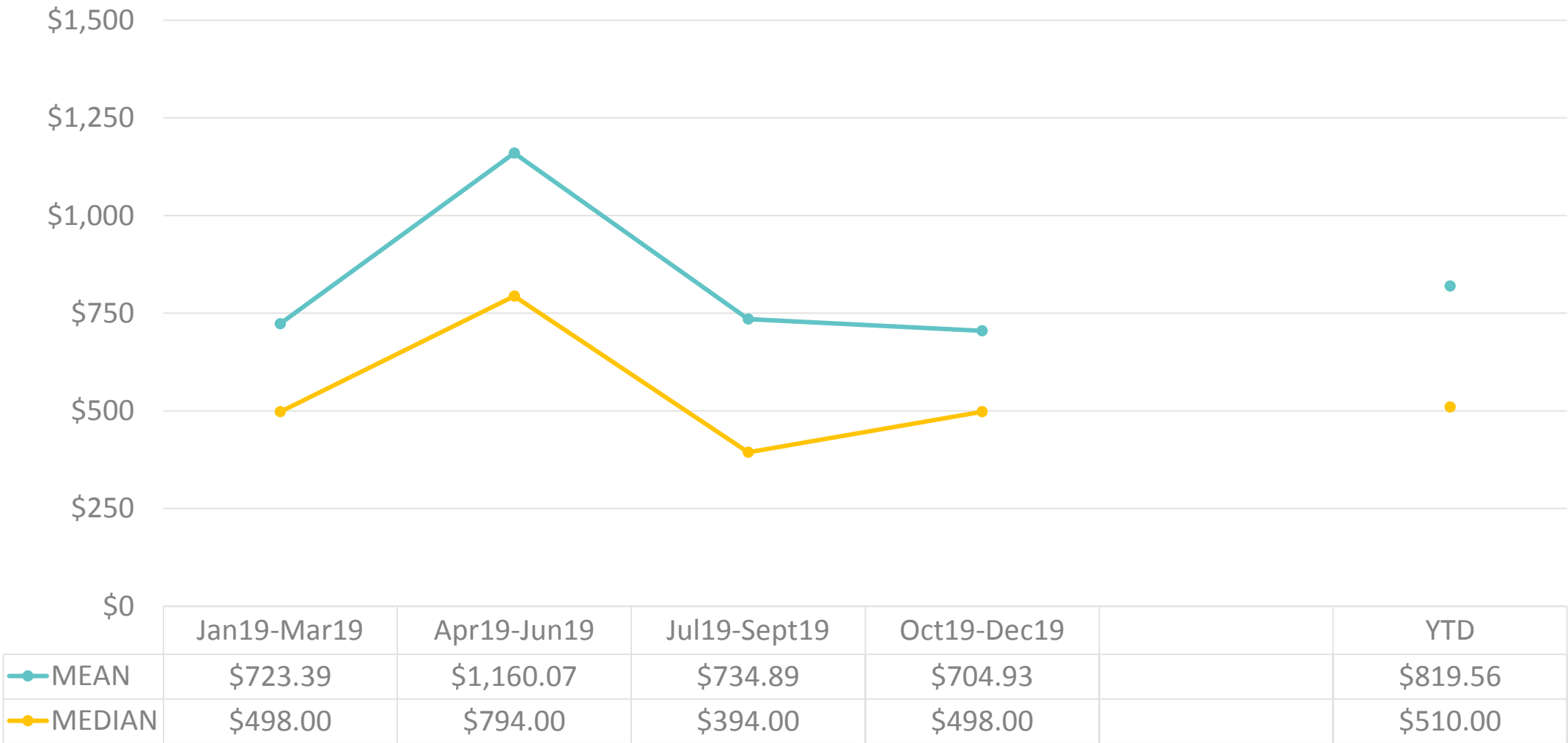
ONISLE EXPENDITURES

- \$1,654.93 = overall mean average expense (for entire travel party) by respondent
- \$704.93 = overall mean average **per person** expenditures

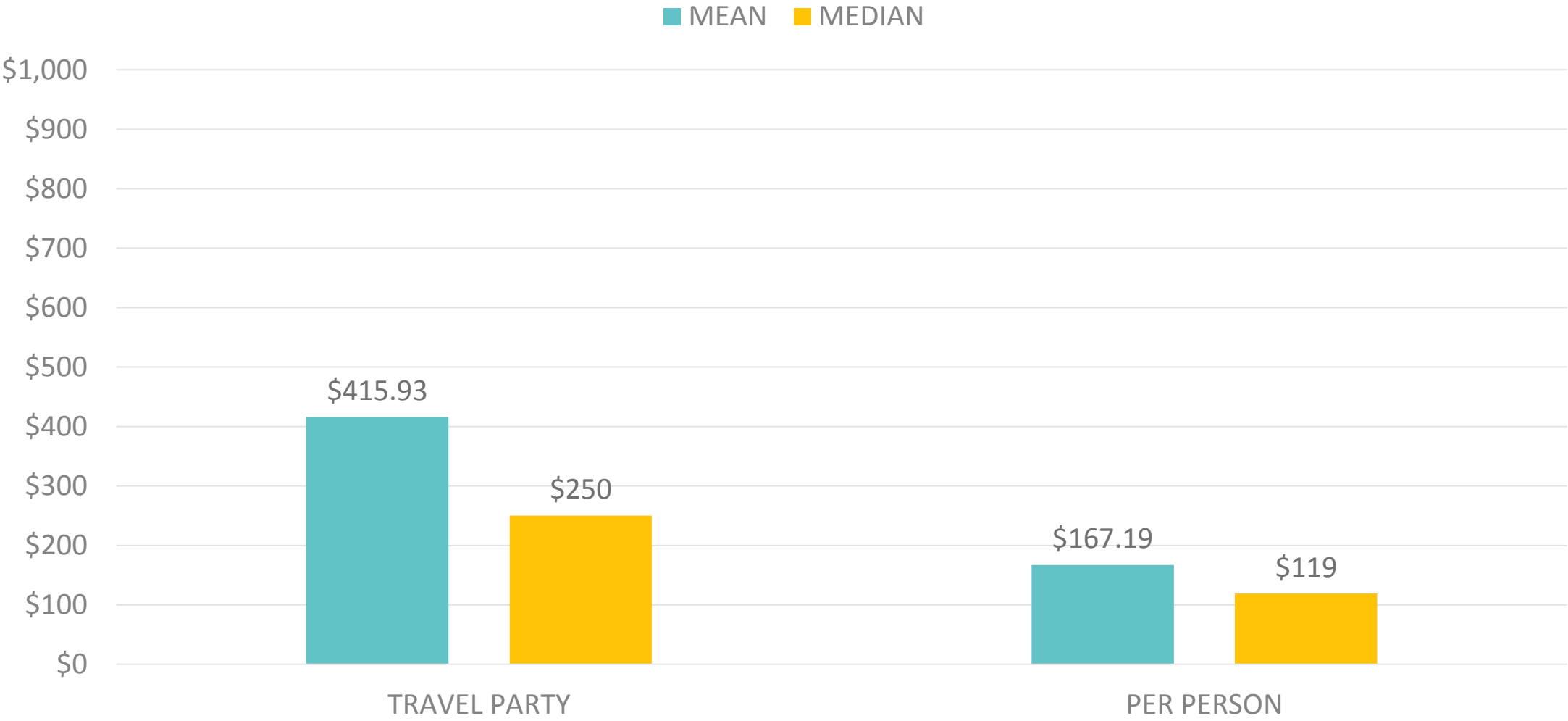
ONISLE – TRAVEL PARTY TRACKING



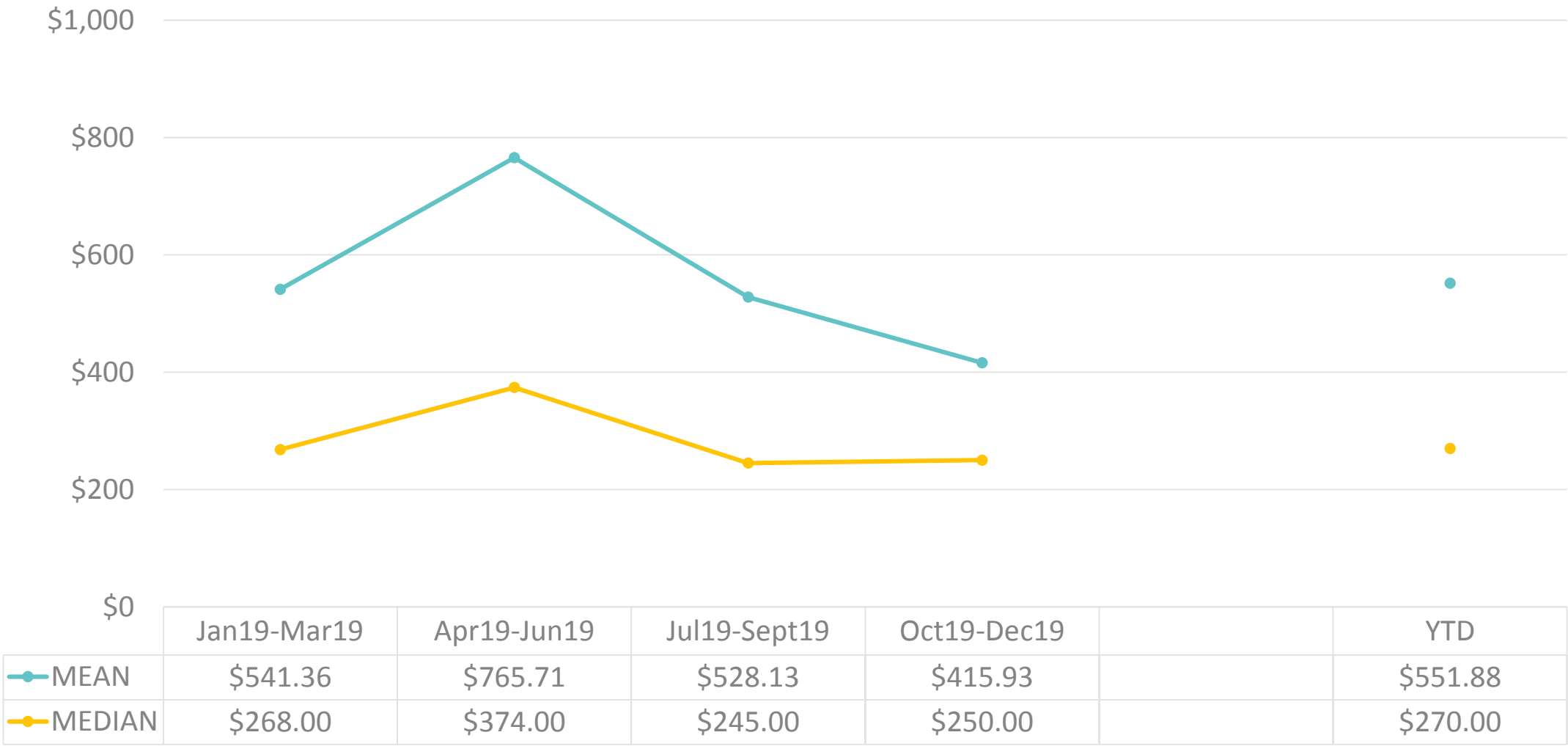
ONISLE – PER PERSON TRACKING



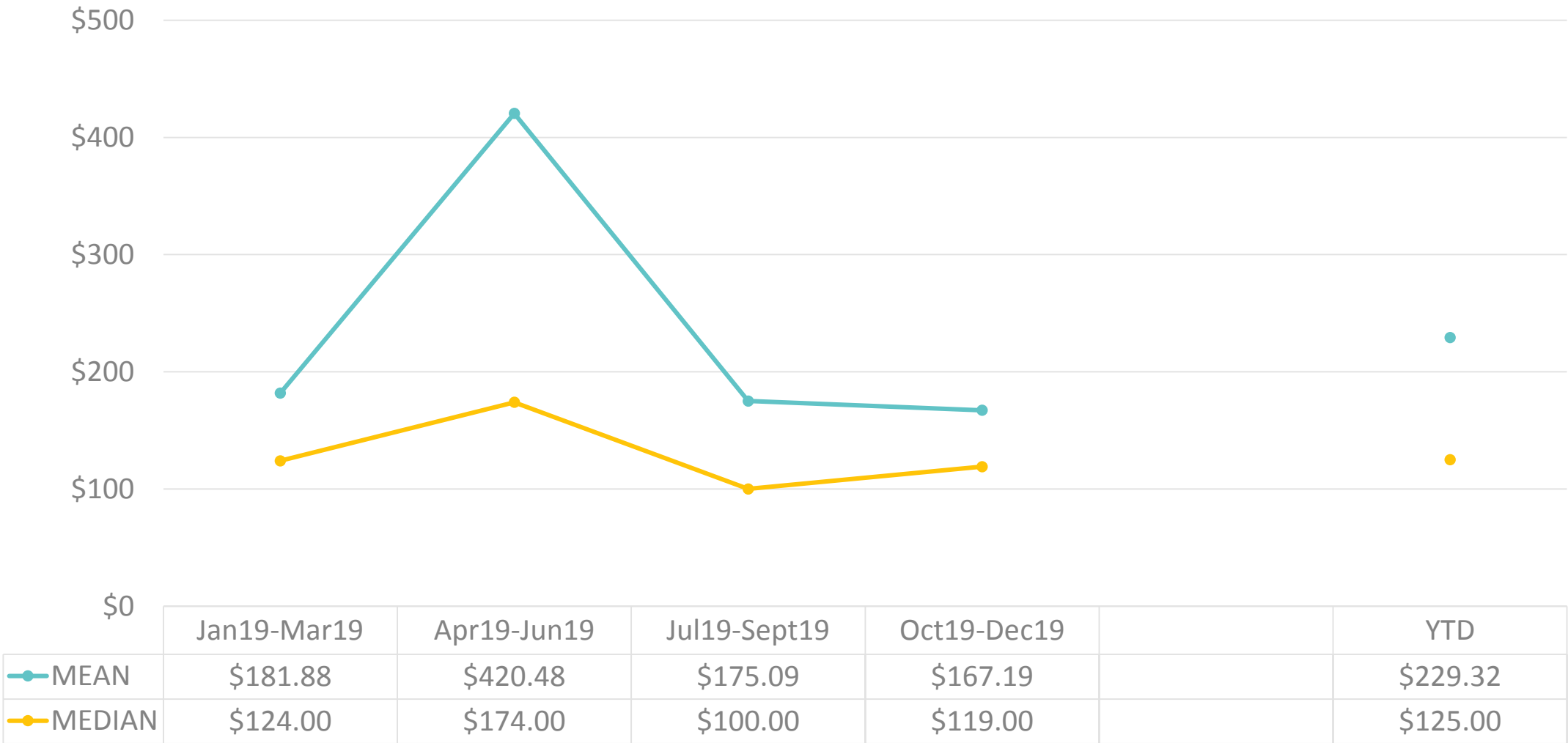
ONISLE – PER DAY SPENDING



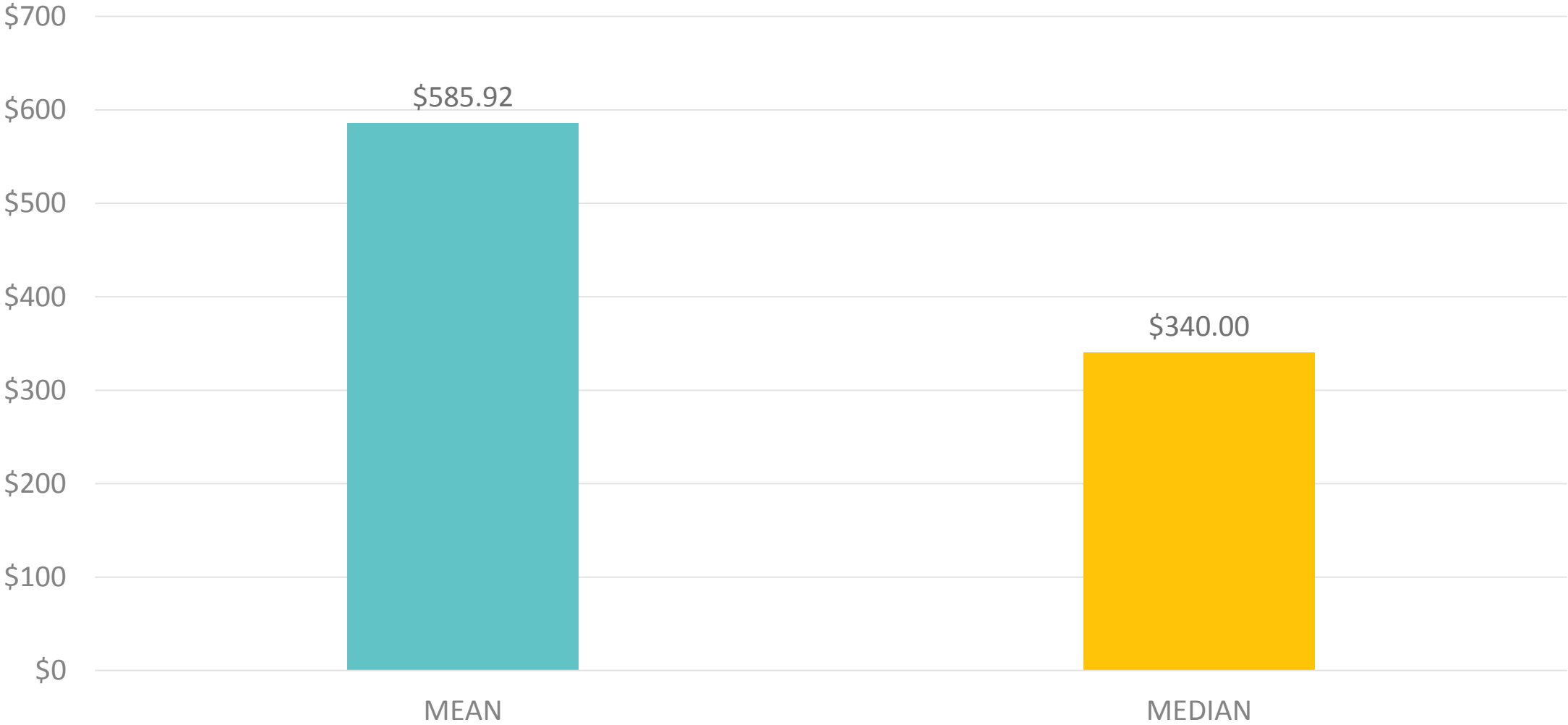
ONISLE – TRAVEL PARTY/ PER DAY TRACKING



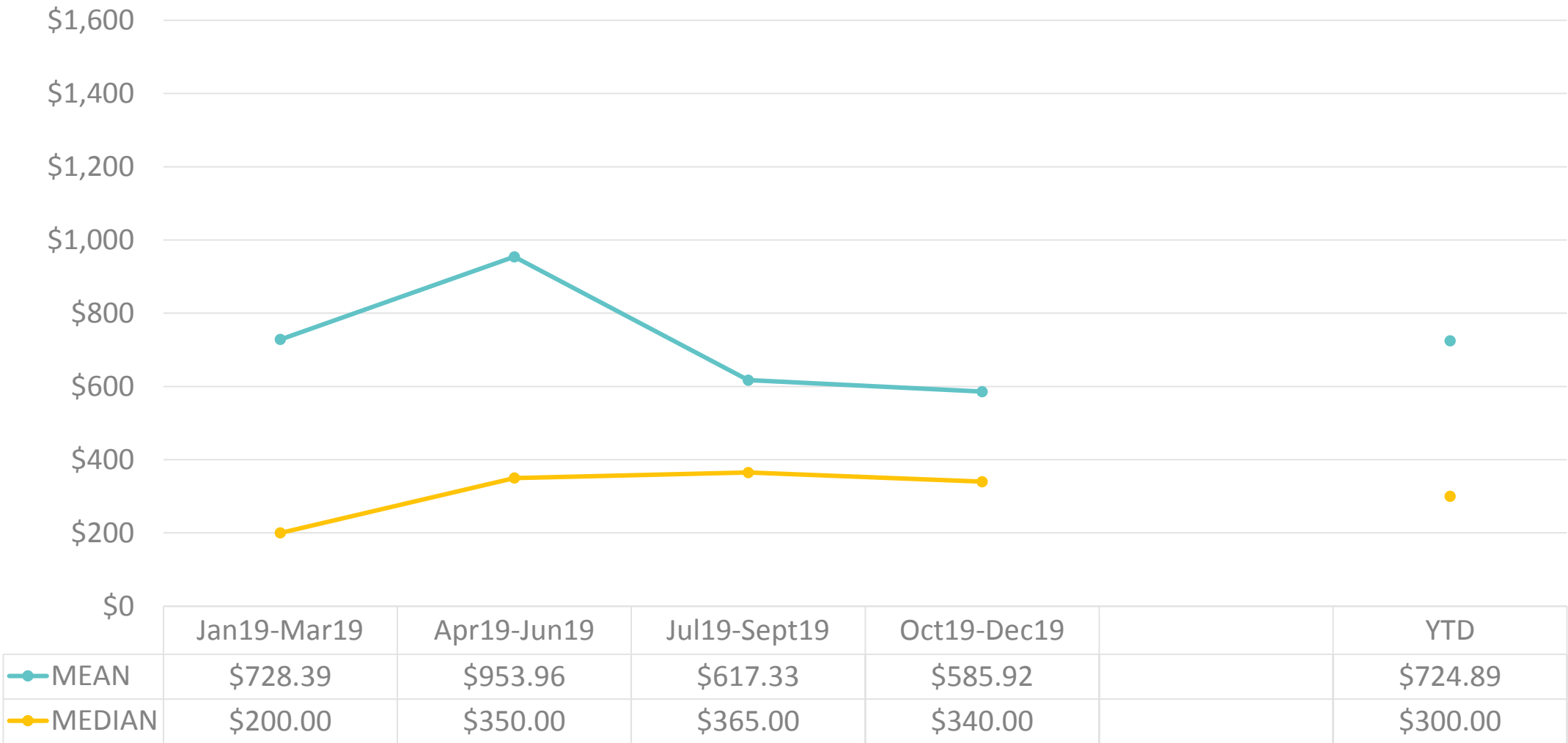
ONISLE – PER PERSON/ PER DAY TRACKING



ONISLE – ACCOMMODATIONS



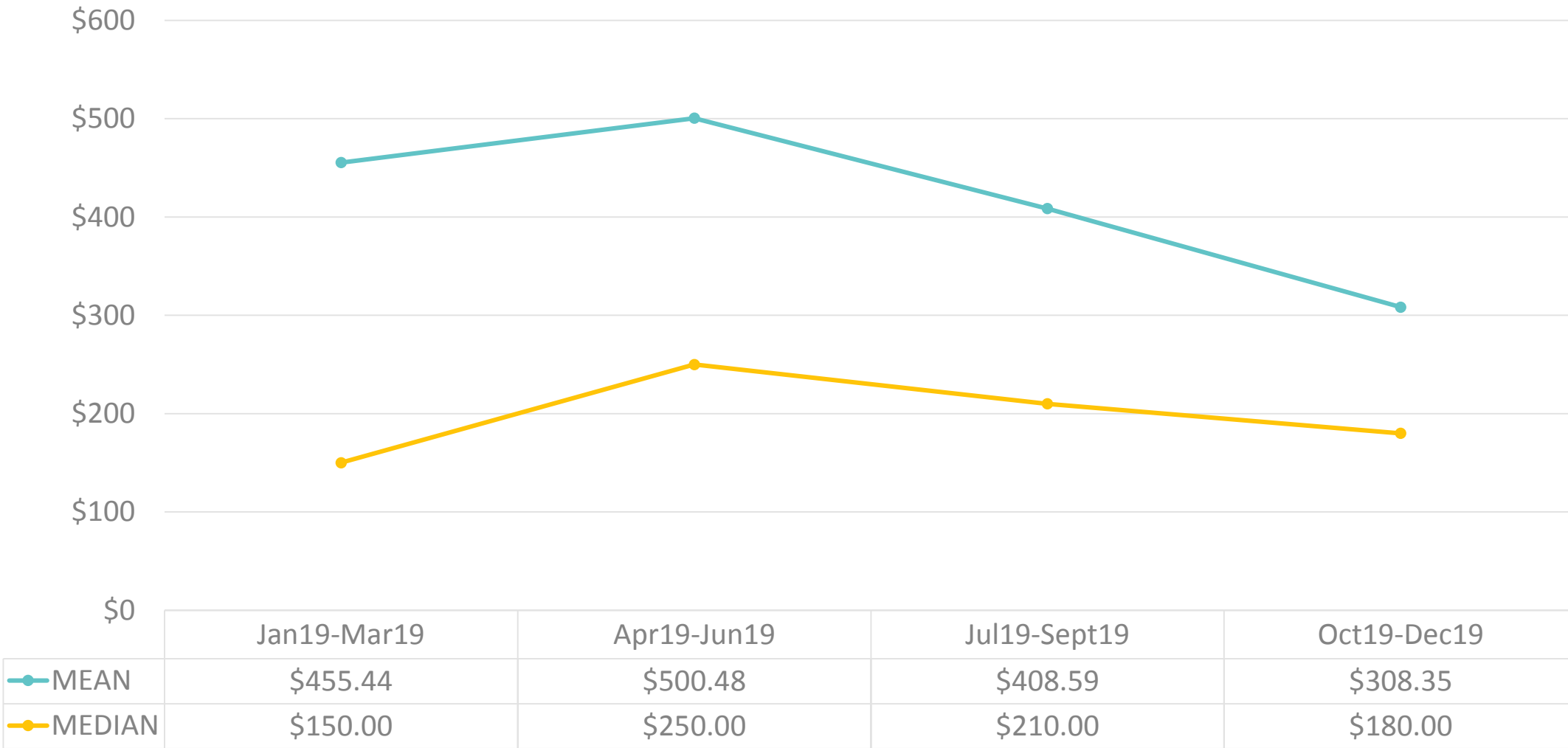
ONISLE – ACCOMMODATIONS TRACKING



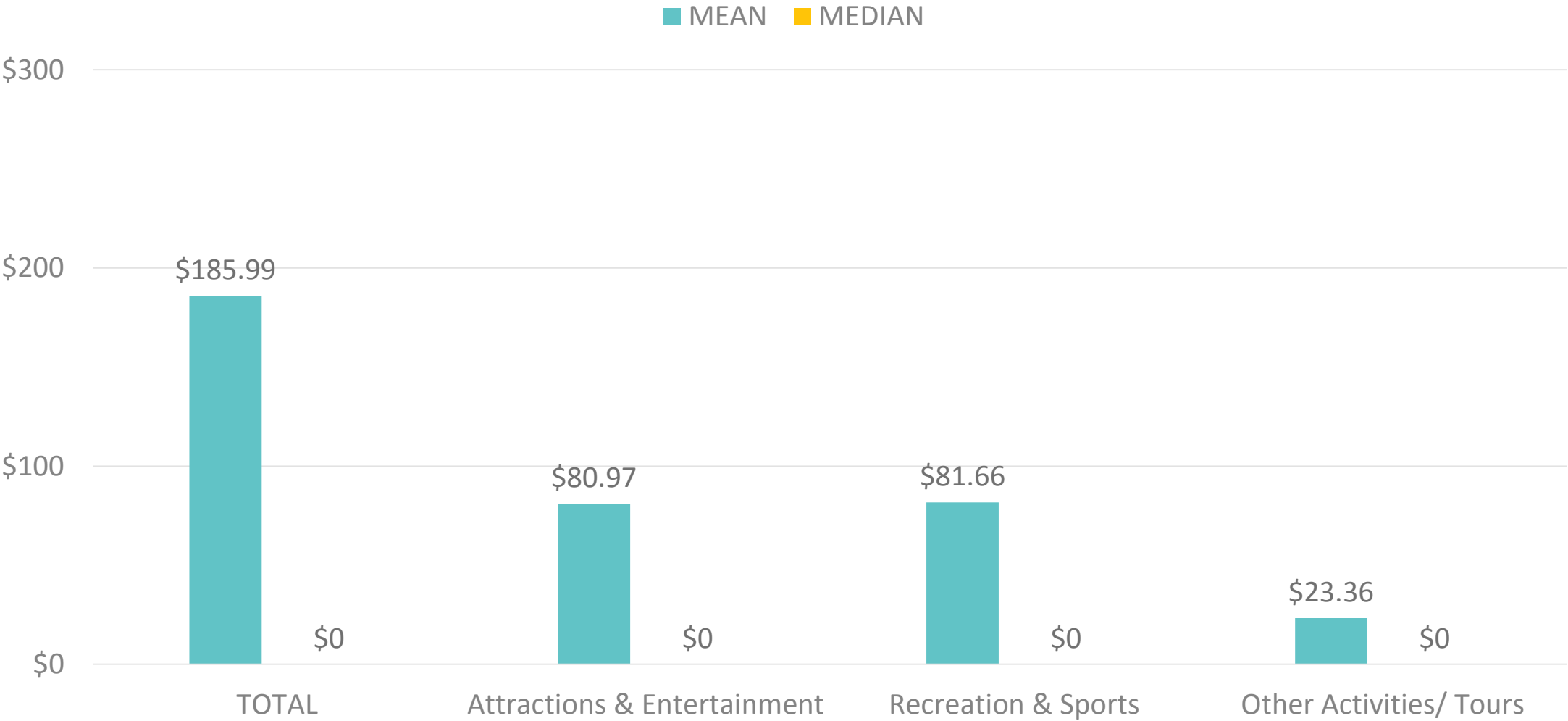
ONISLE – FOOD & BEVERAGE



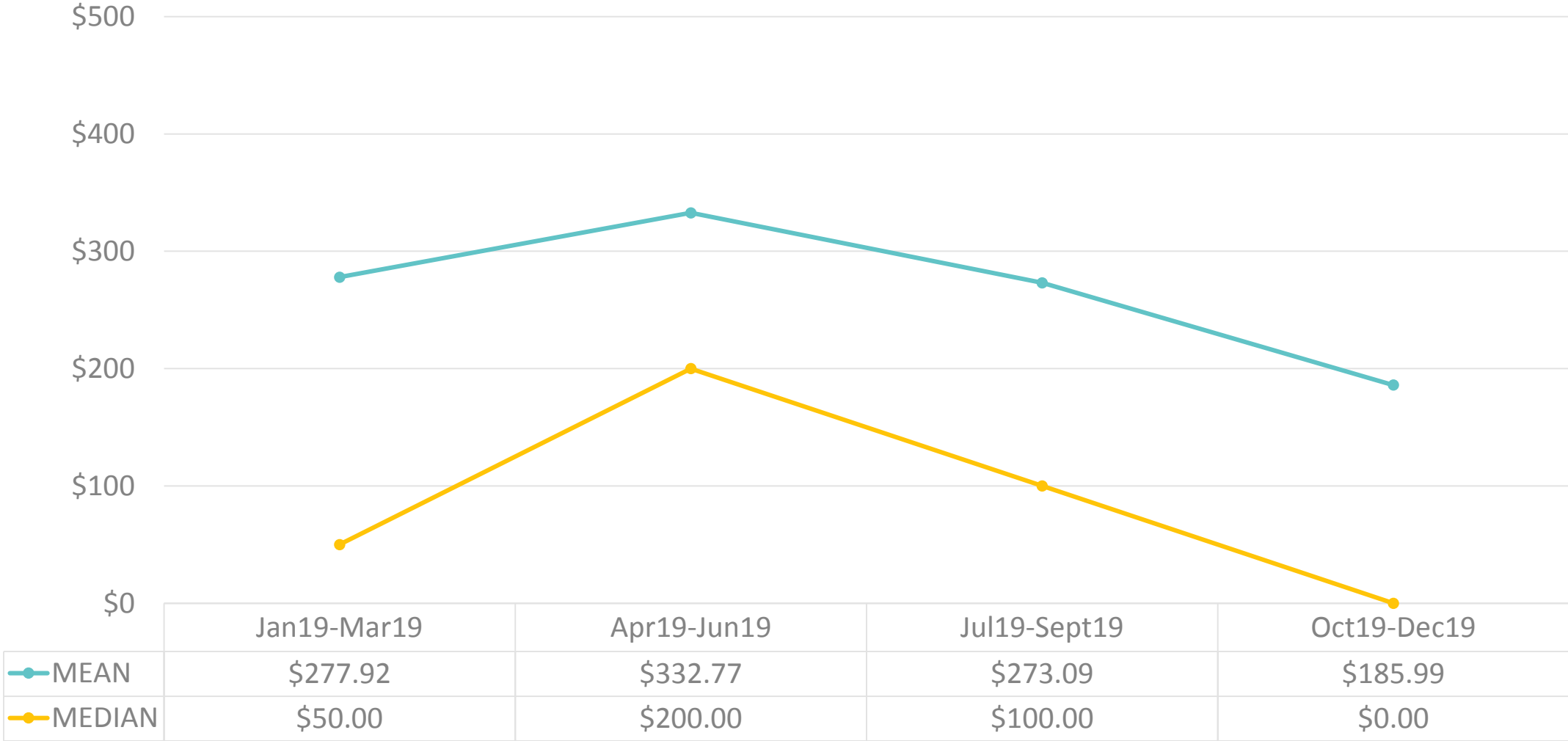
ONISLE – TOTAL FOOD & BEVERAGE TRACKING



ONISLE – ENTERTAINMENT & RECREATION



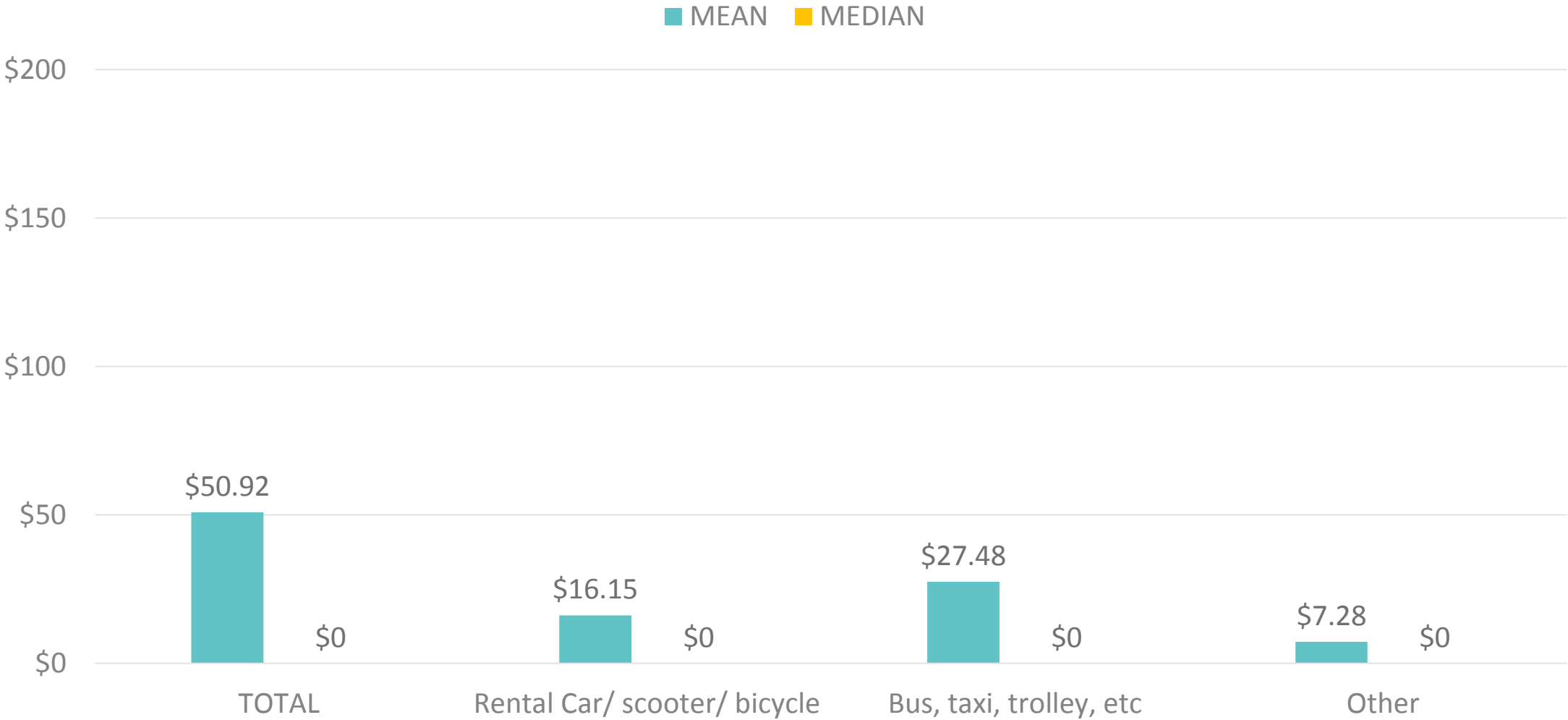
ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING



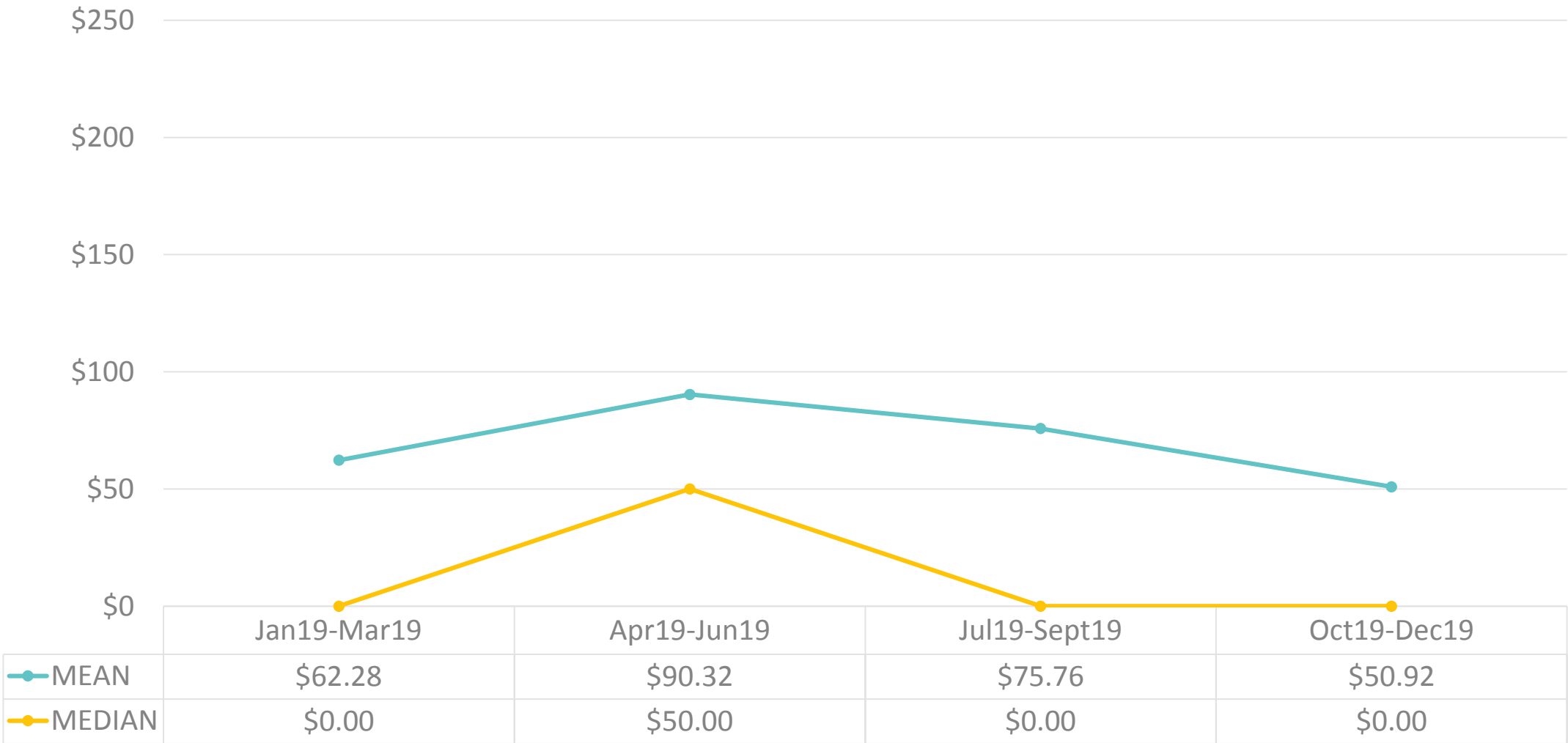
[A]



ONISLE – TRANSPORTATION



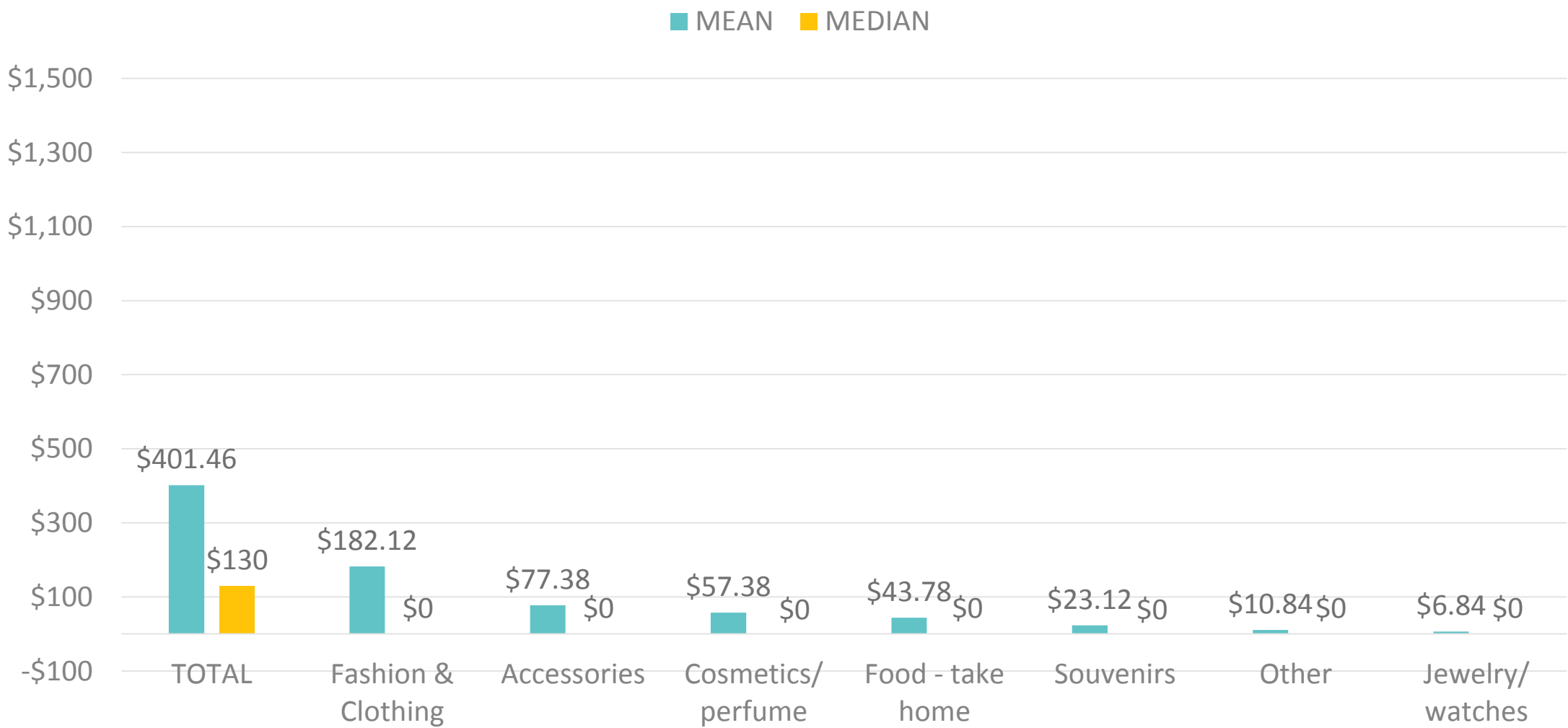
ONISLE – TOTAL TRANSPORTATION TRACKING



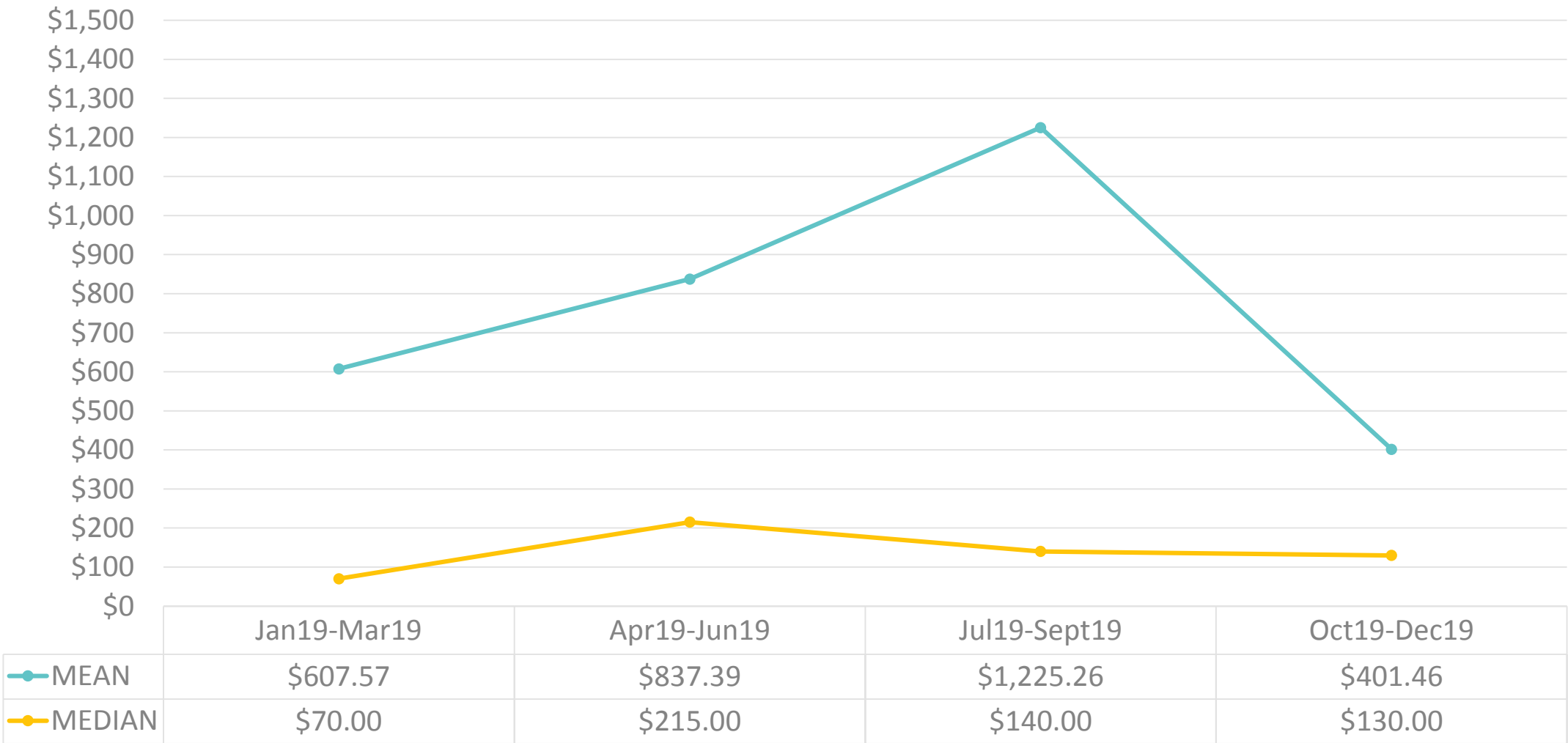
[A]



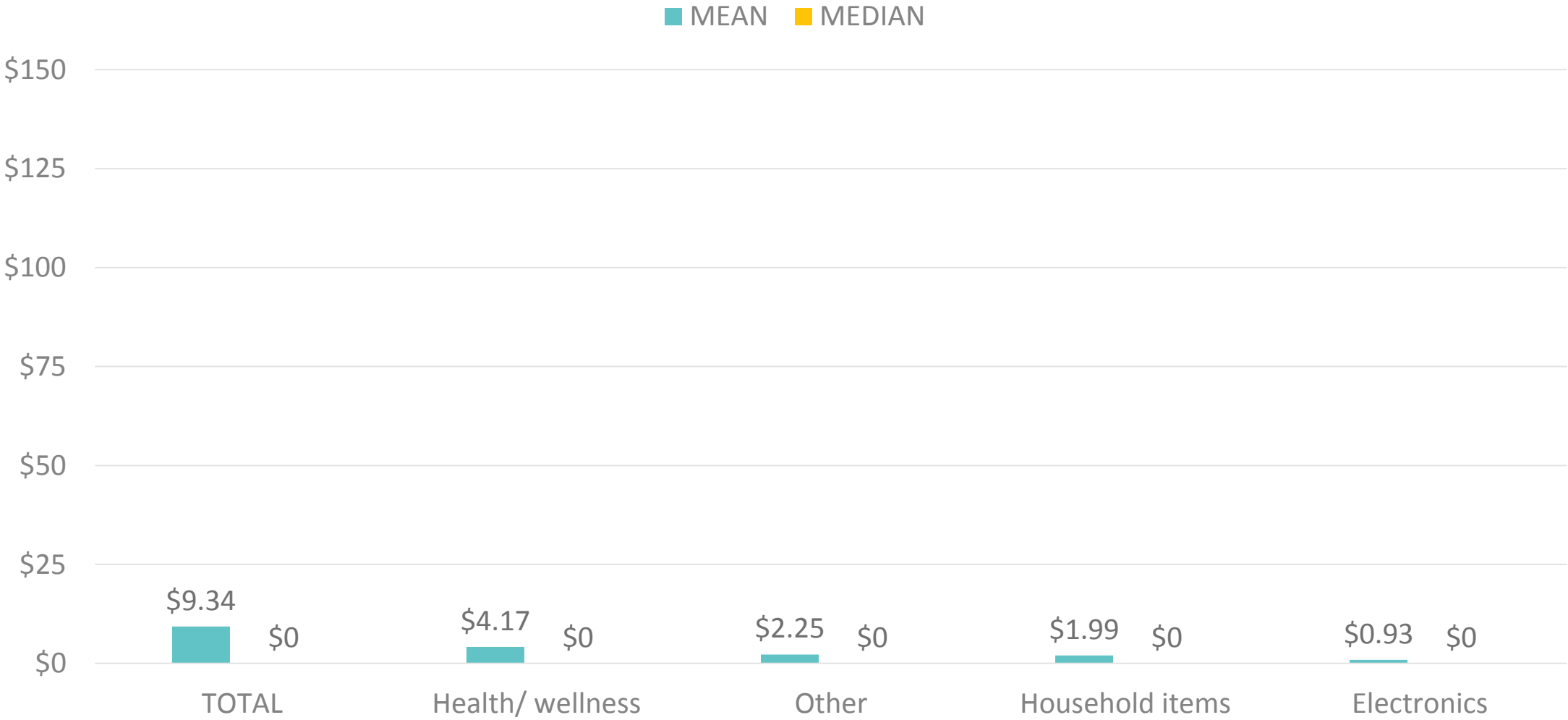
ONISLE – SHOPPING



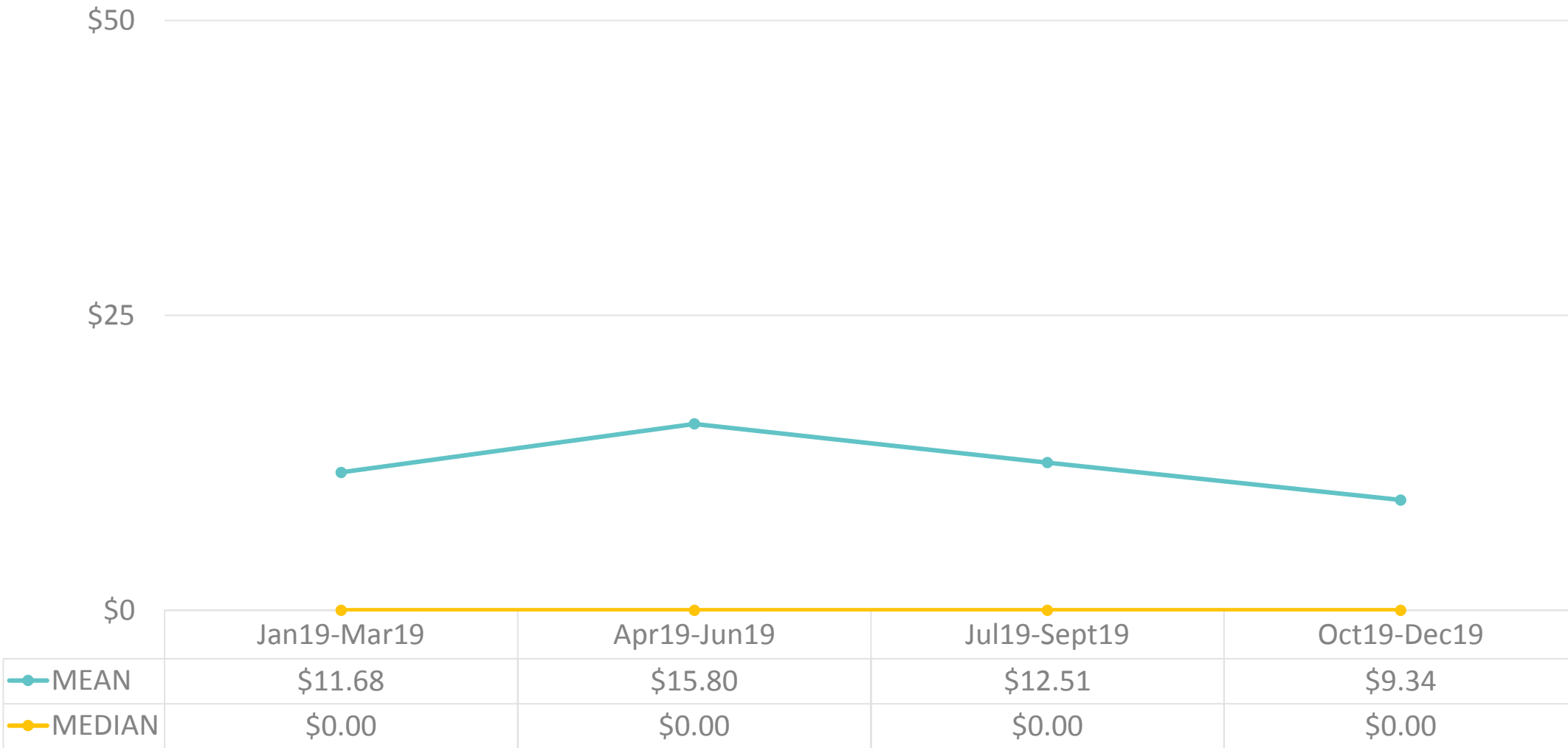
ONISLE – TOTAL SHOPPING TRACKING



ONISLE – MISCELLANEOUS



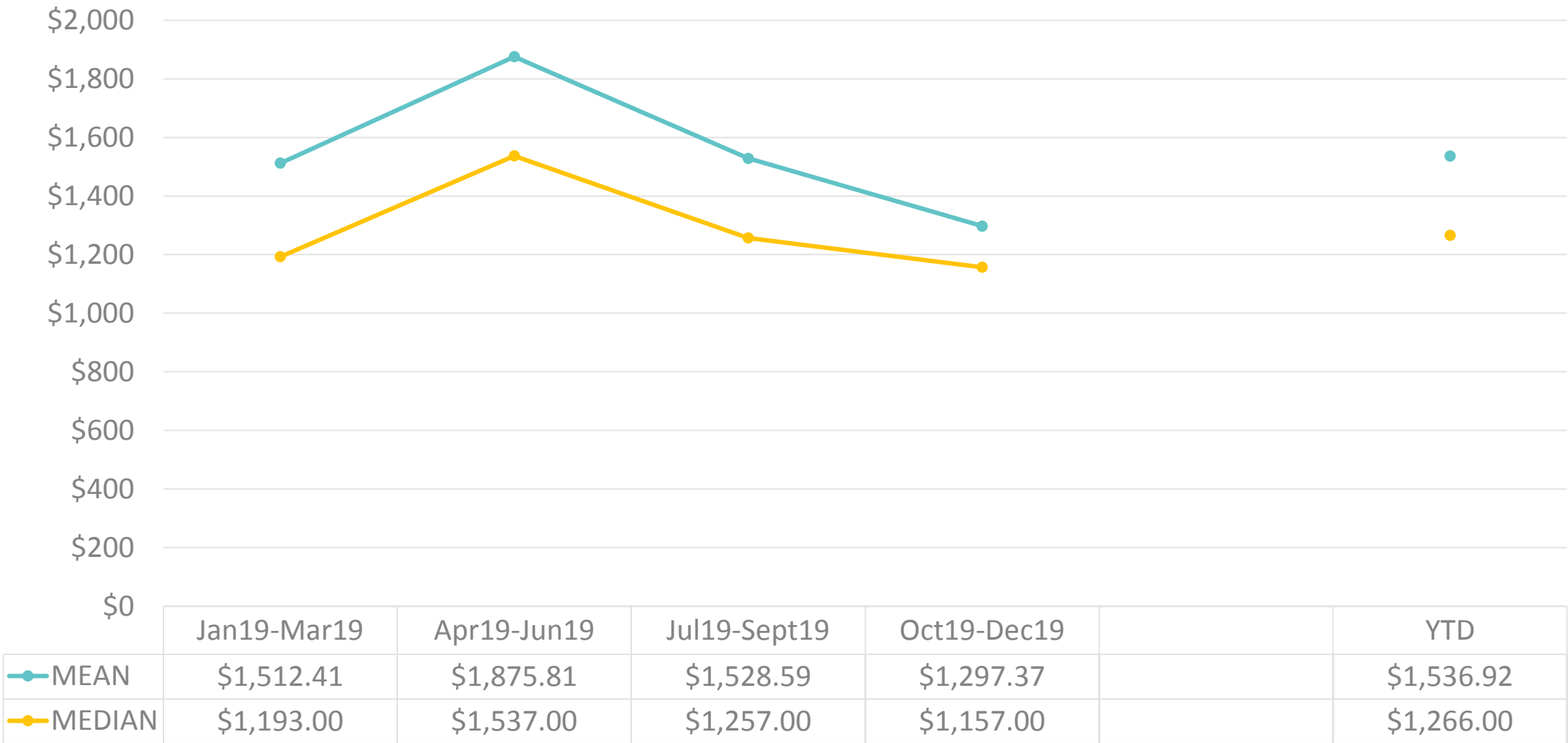
ONISLE – MISCELLANEOUS TRACKING



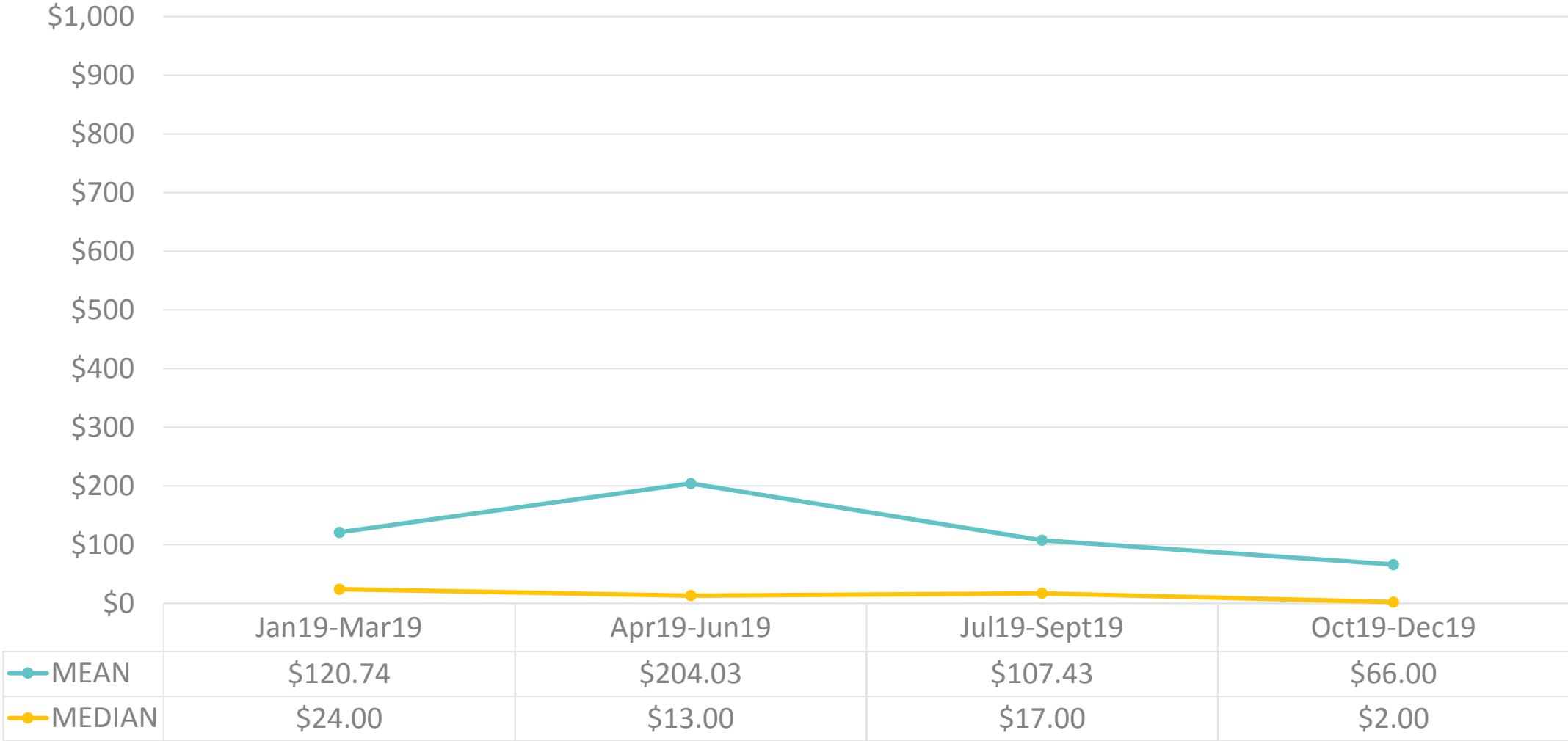
TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

- \$1,297.37 = Mean average per person
- \$1,157.00 = Median amount spent per person

TOTAL EXPENDITURES PER PERSON TRACKING



GUAM AIRPORT EXPENDITURE TRACKING



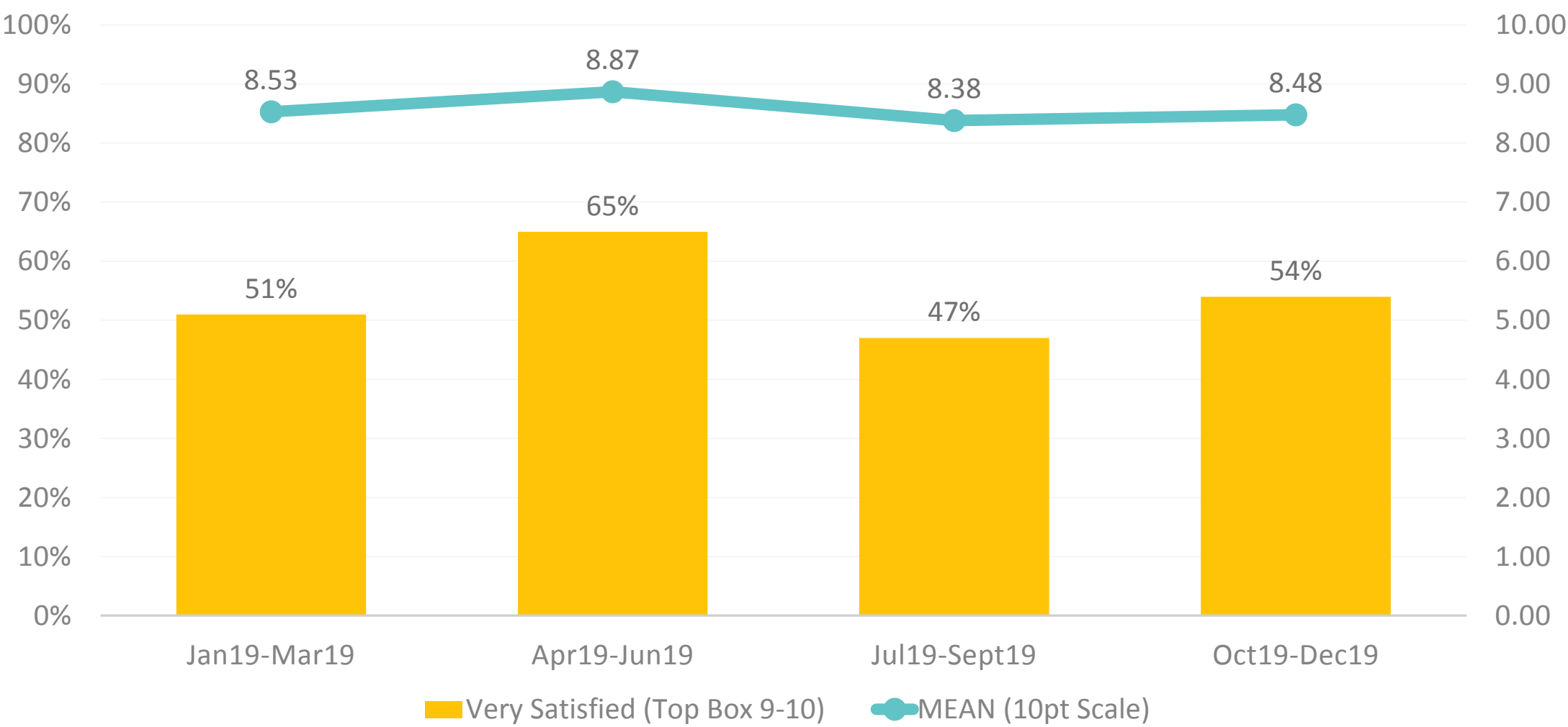


SECTION 4

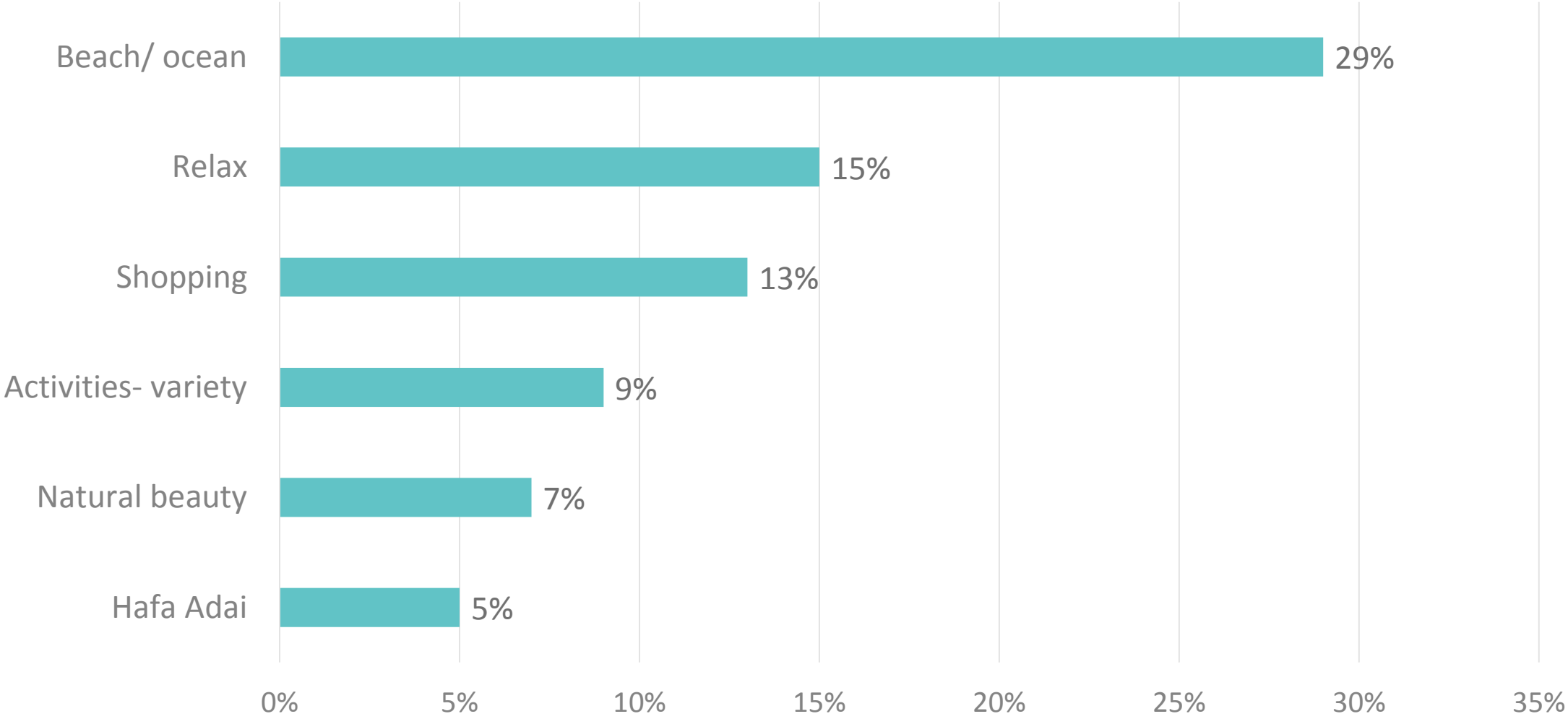
VISITOR SATISFACTION



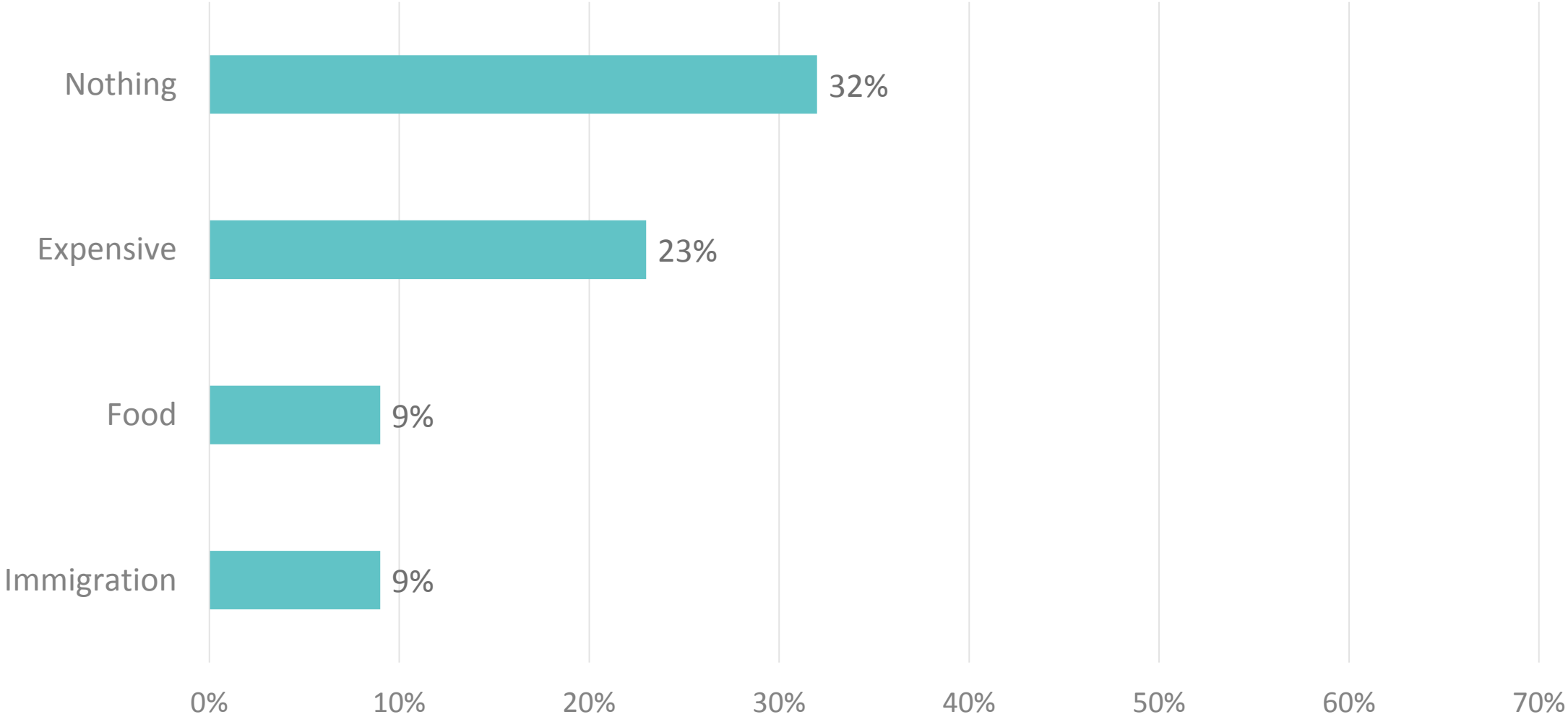
OVERALL SATISFACTION – 10PT SCALE



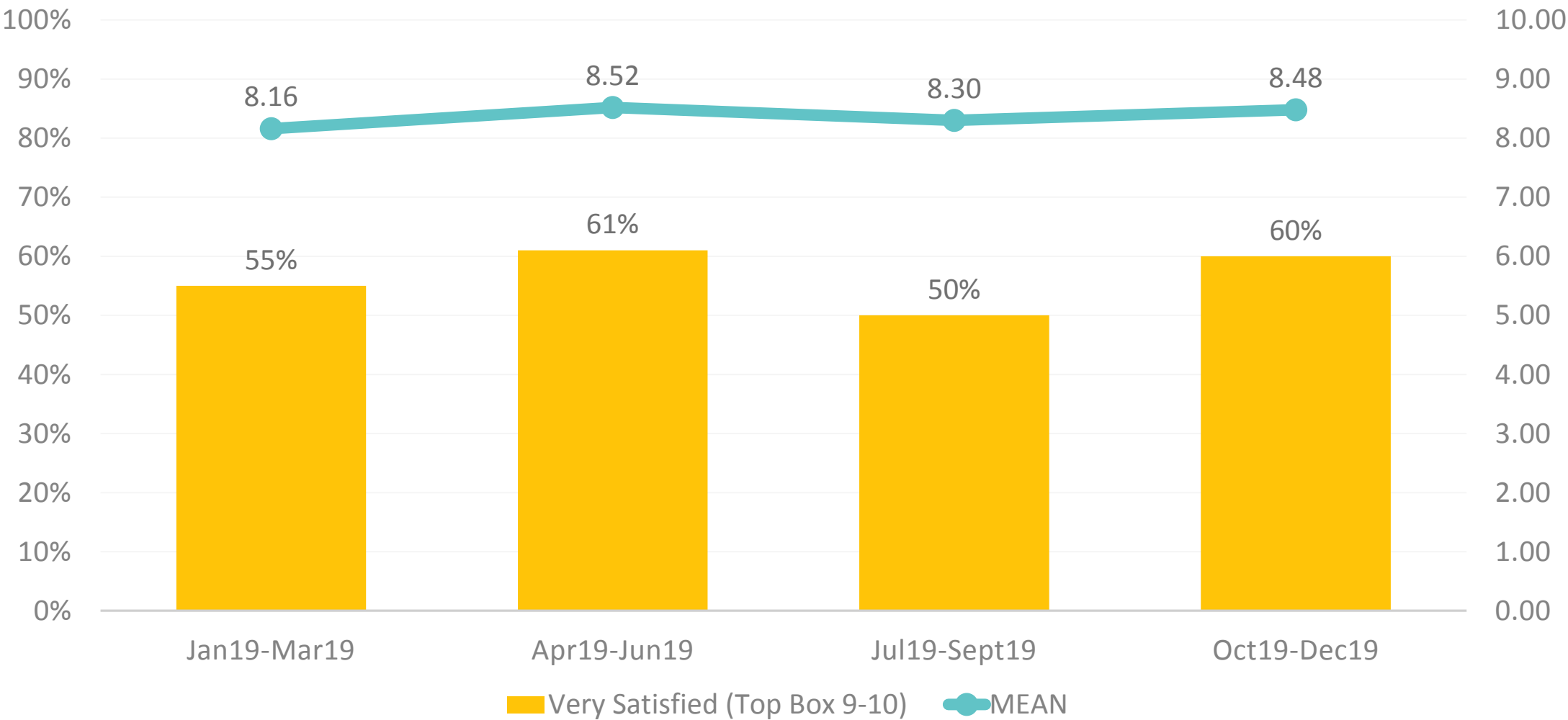
SWOT – POSITIVE ASPECT OF TRIP



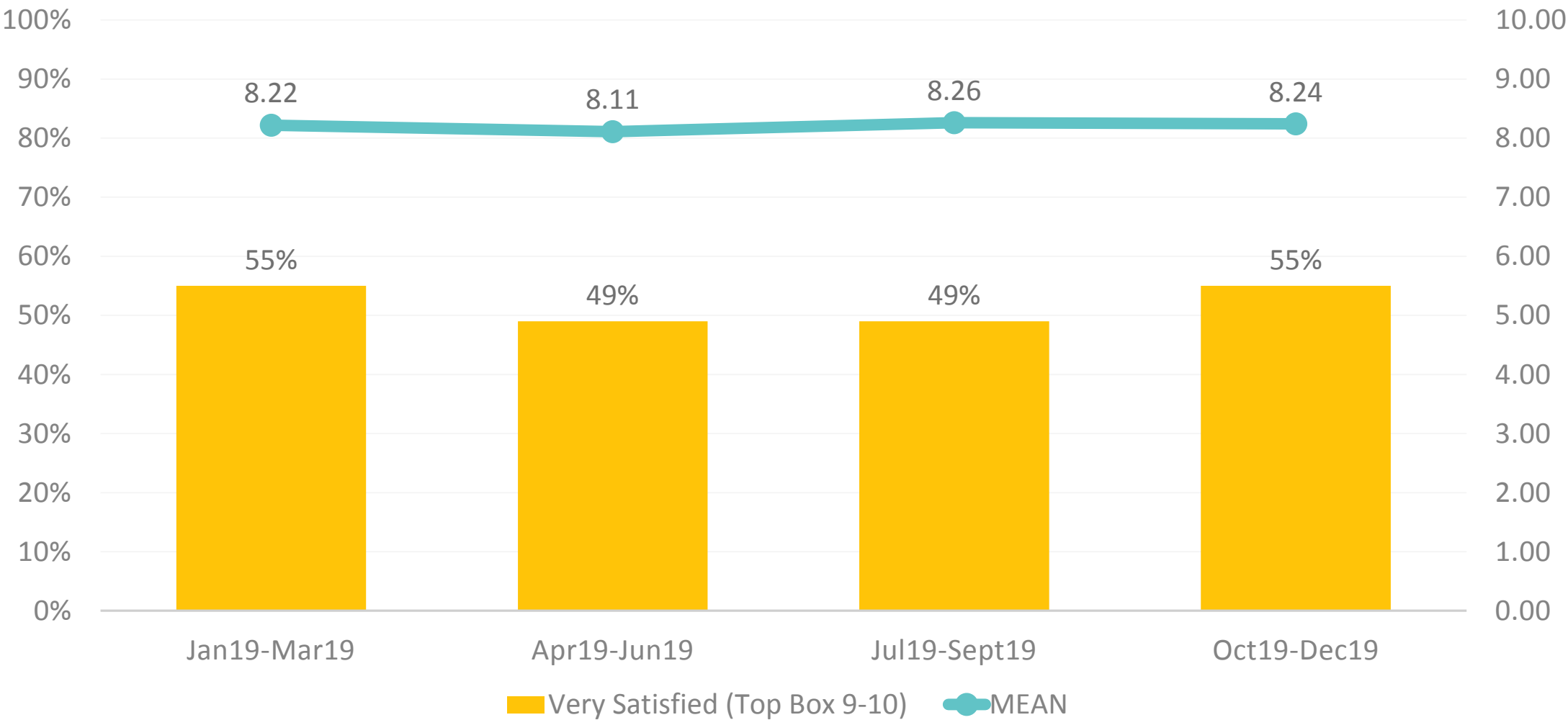
SWOT – NEGATIVE ASPECT OF TRIP



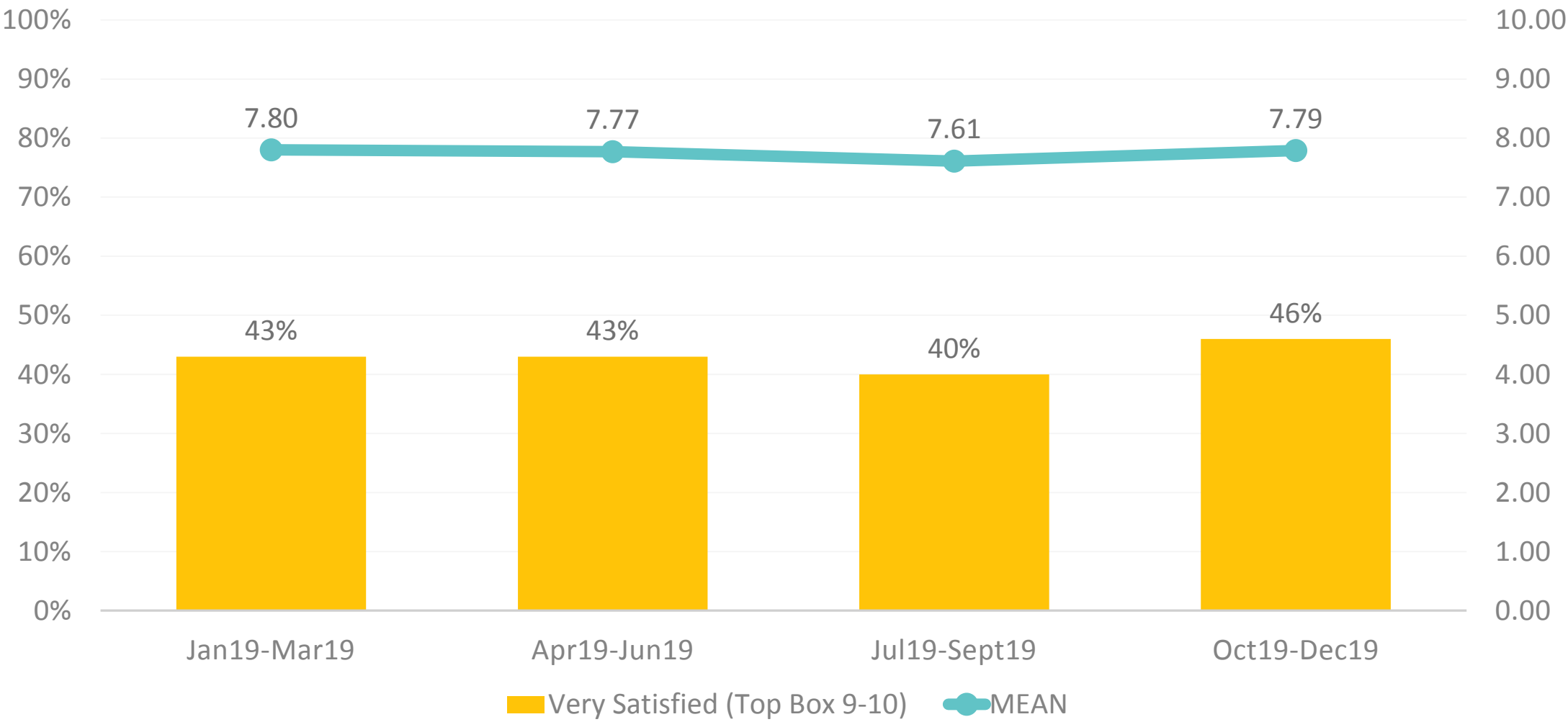
SATISFACTION – ENTERTAINMENT



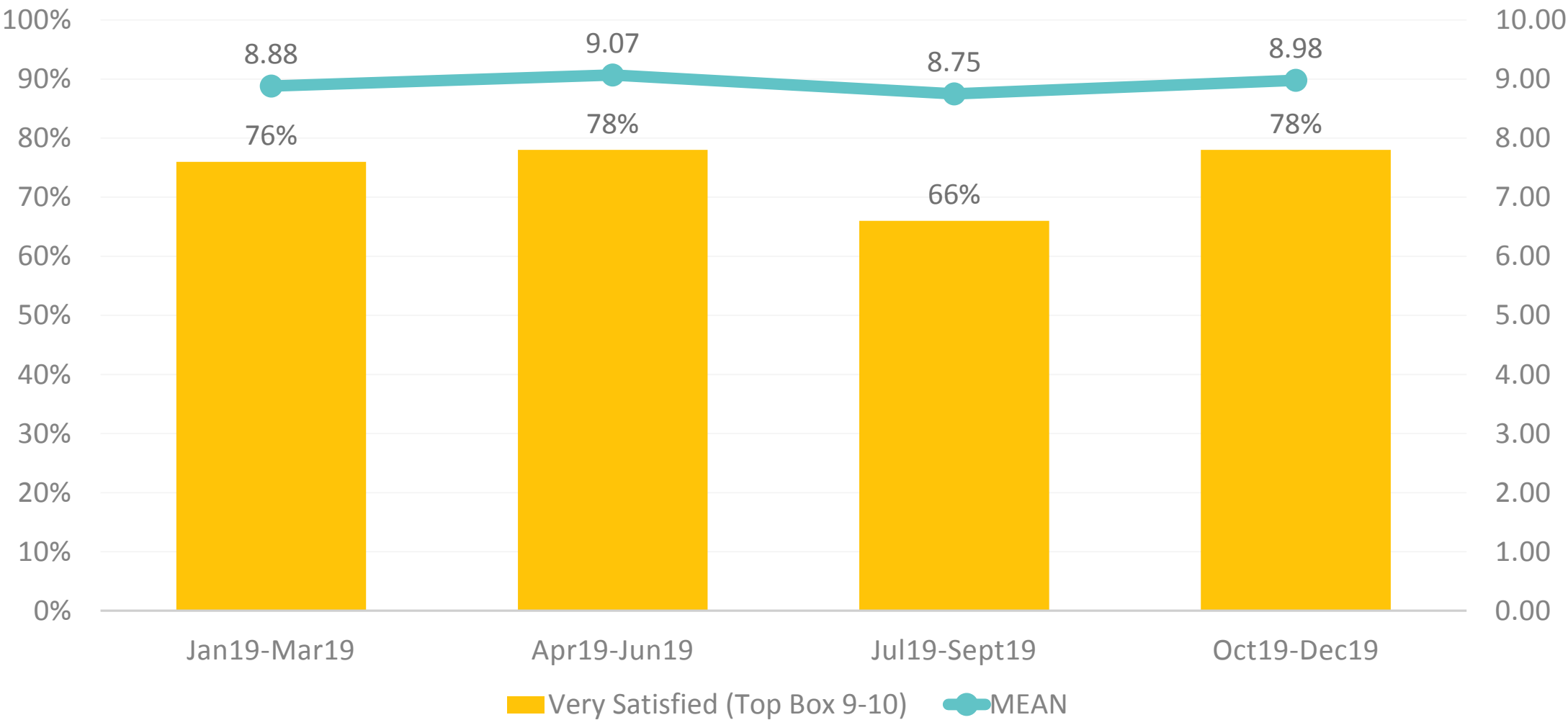
SATISFACTION – SHOPPING



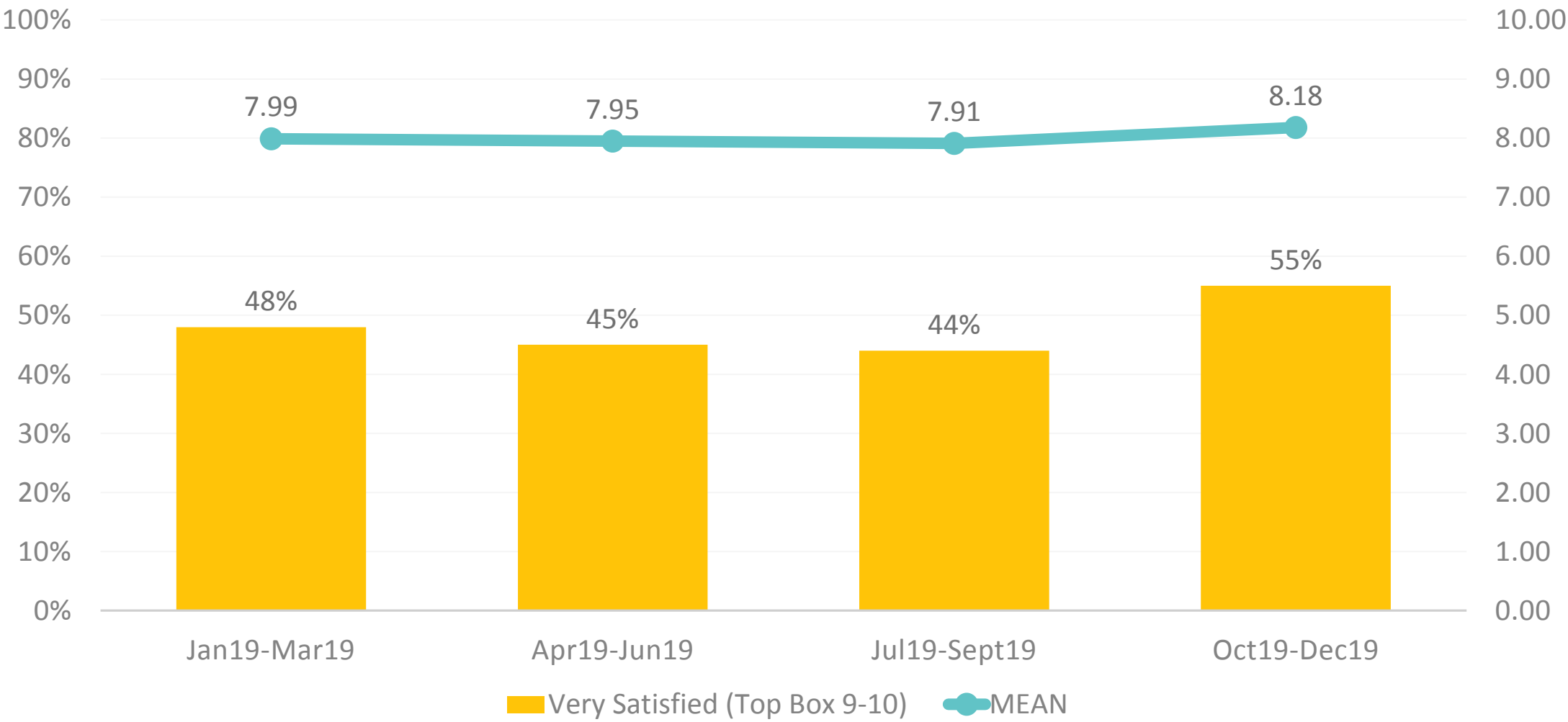
SATISFACTION – DINING



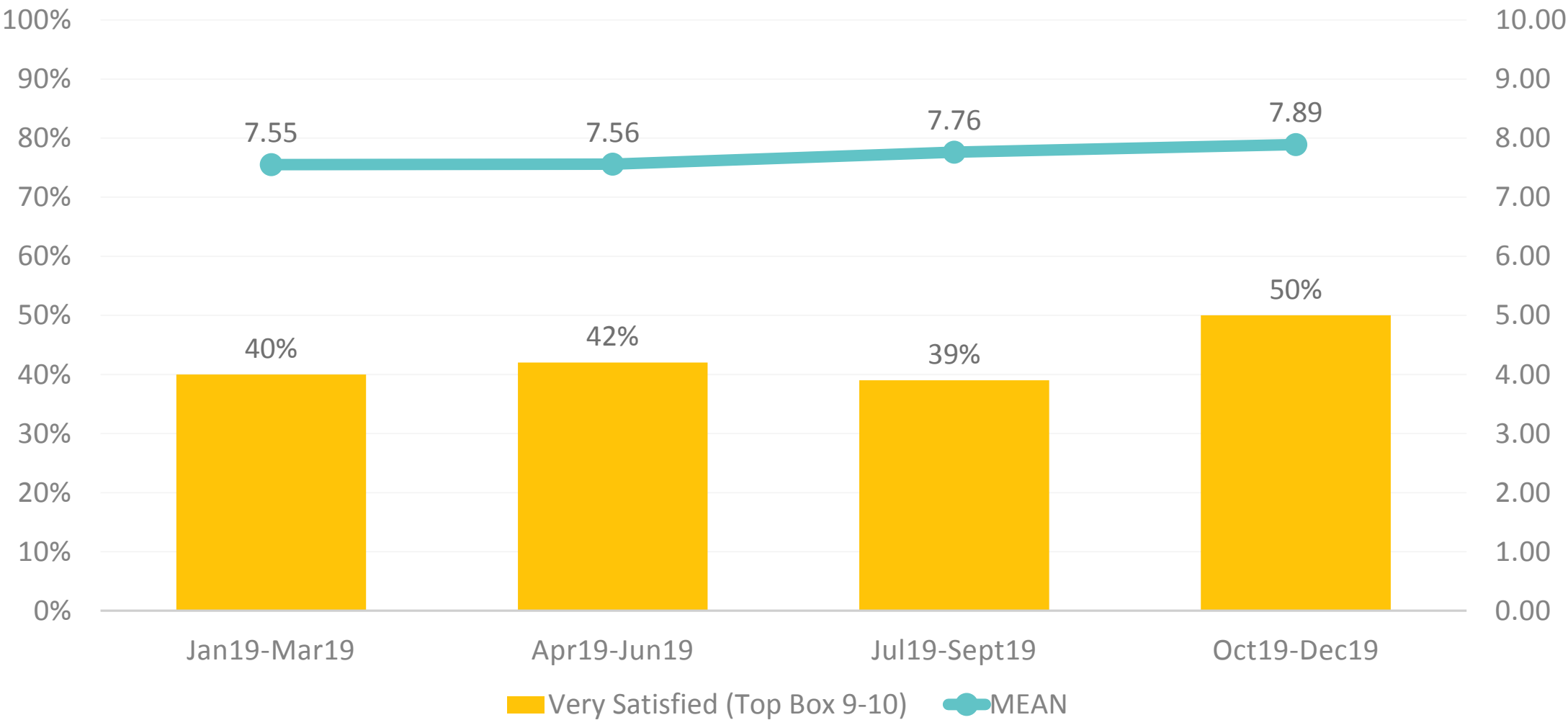
SATISFACTION – BEACHES



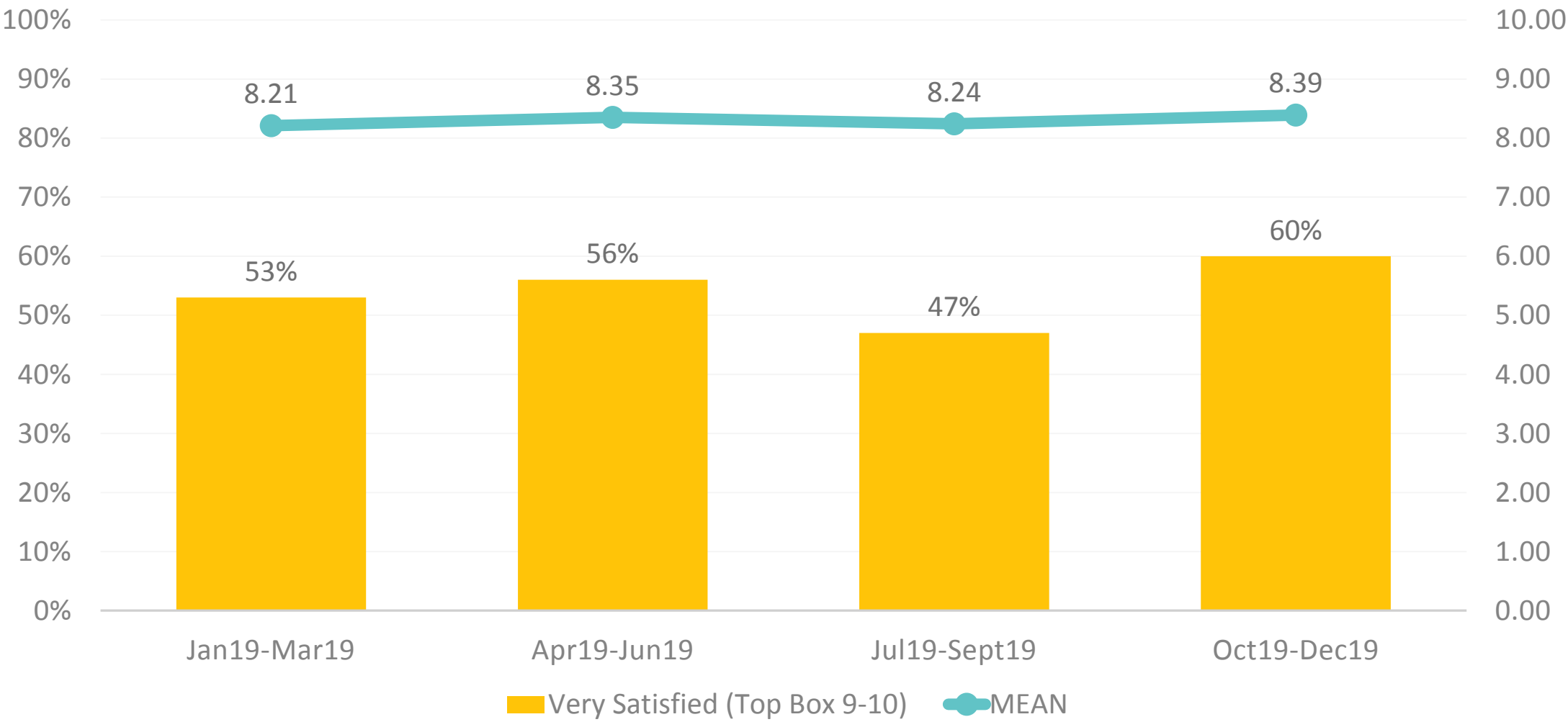
SATISFACTION – PARKS



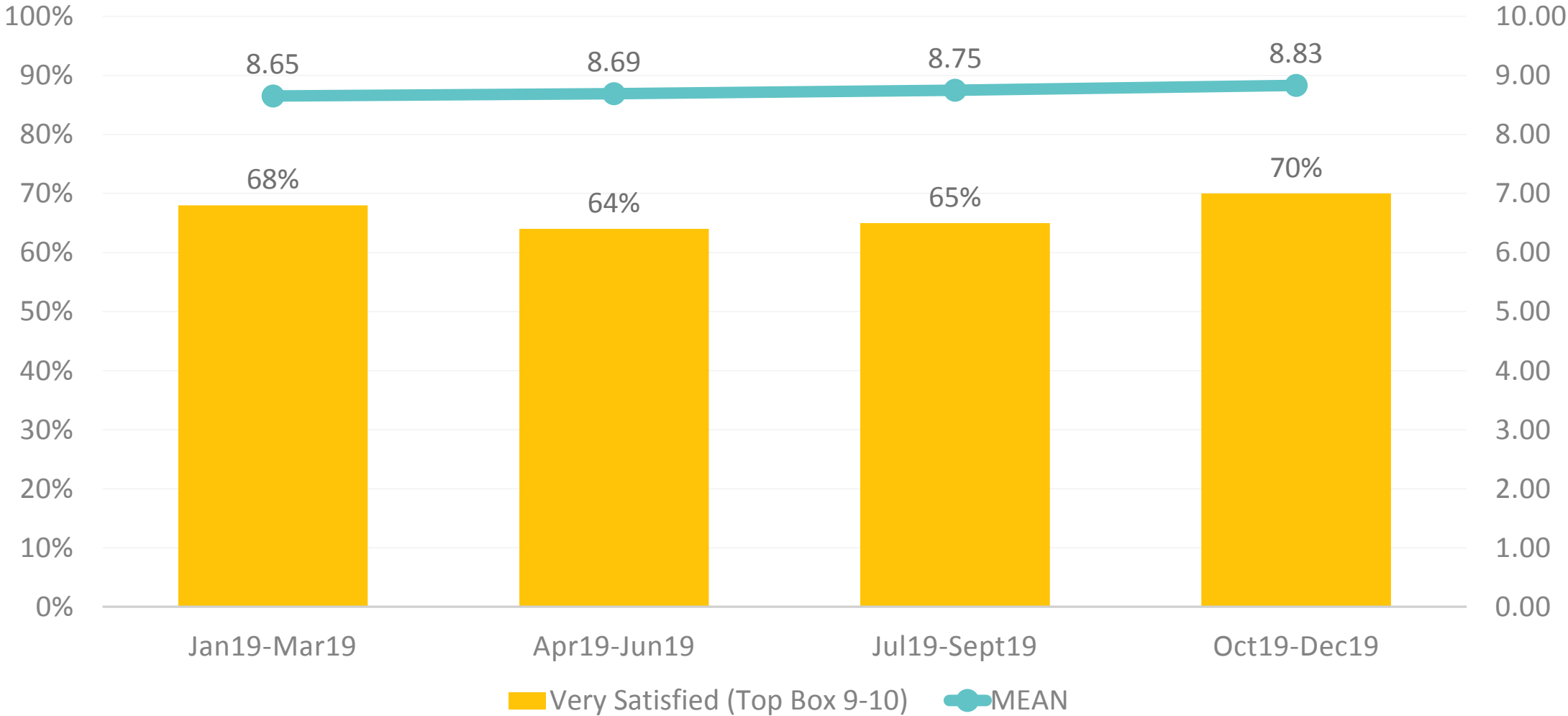
SATISFACTION – ROADS



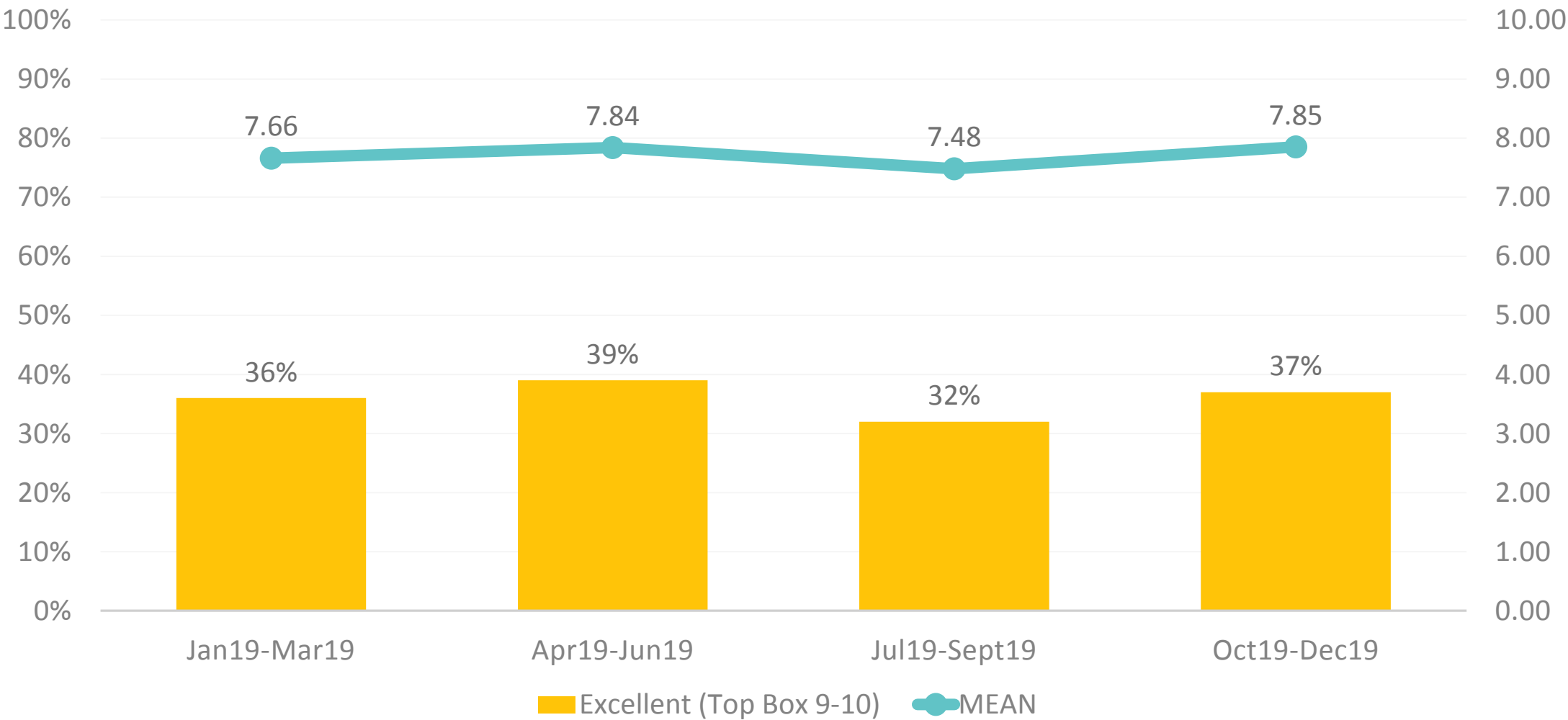
SATISFACTION – SIGHTSEEING AREAS



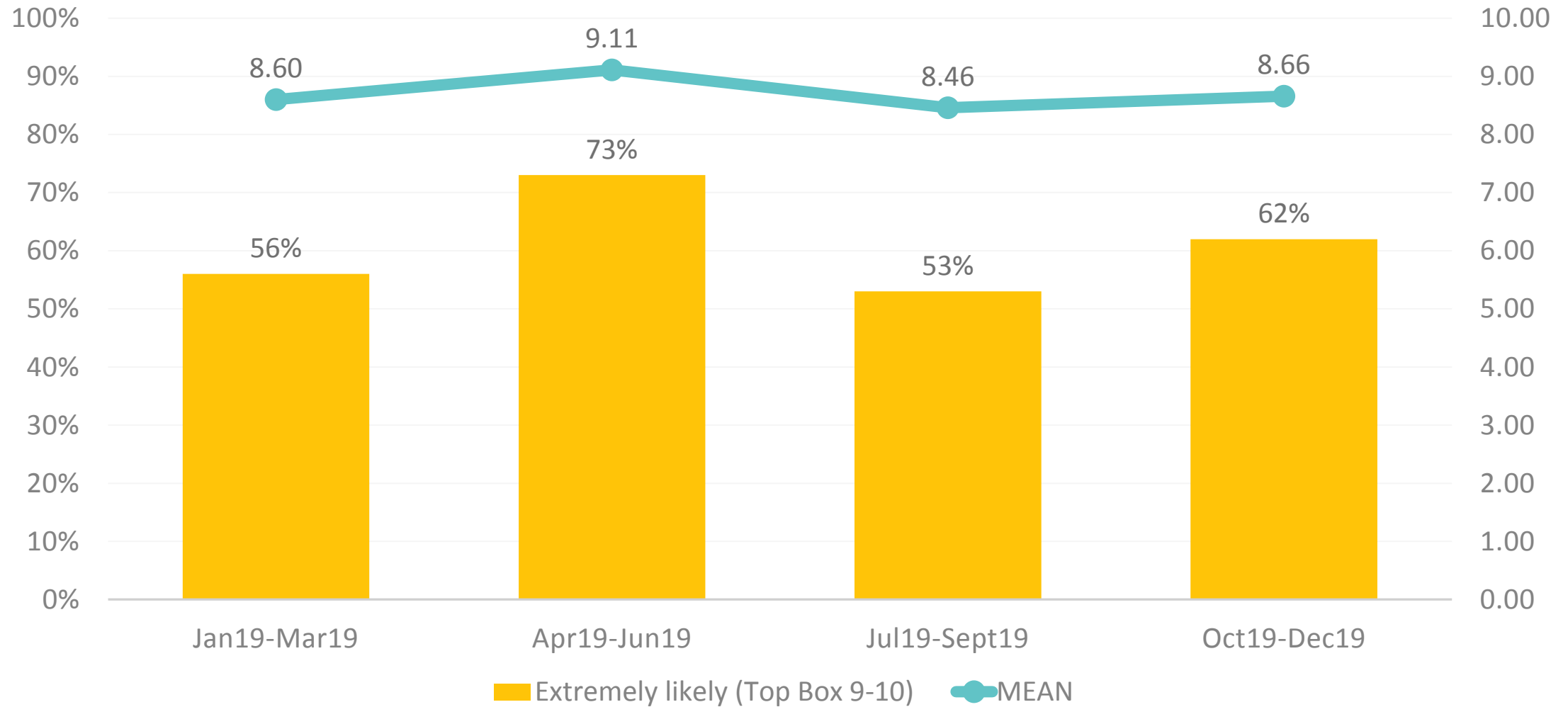
SATISFACTION – SAFETY & SECURITY



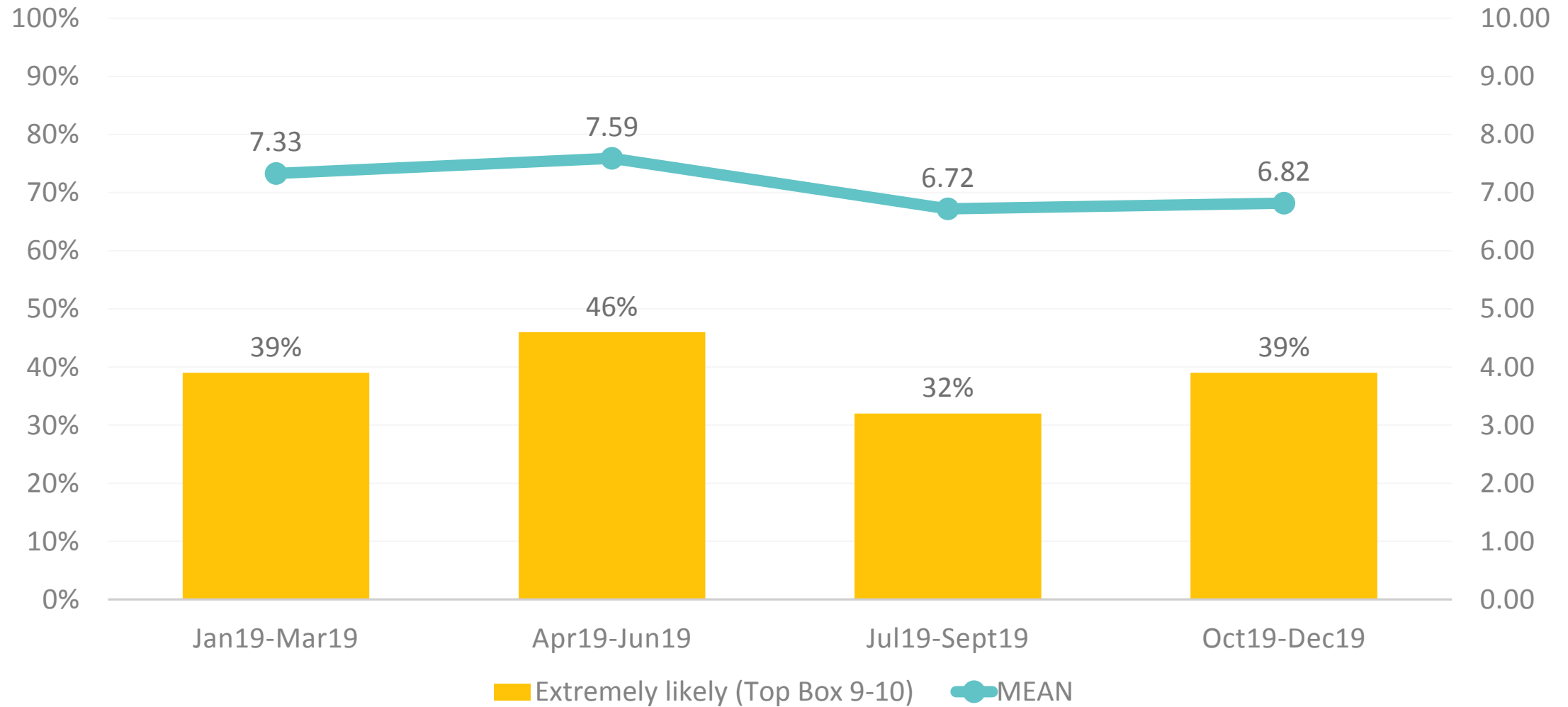
SATISFACTION – ACCOMMODATIONS



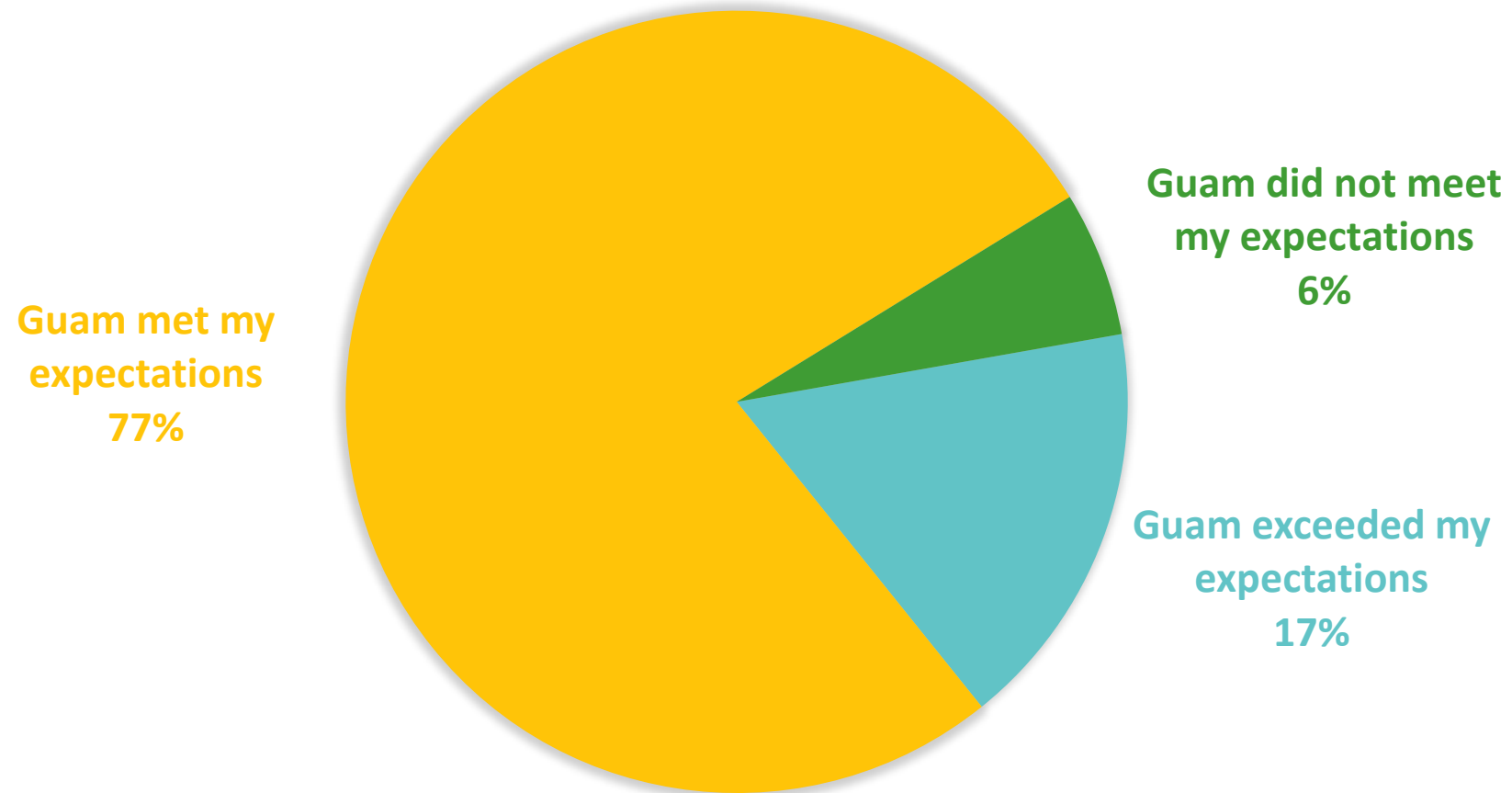
BRAND ADVOCACY



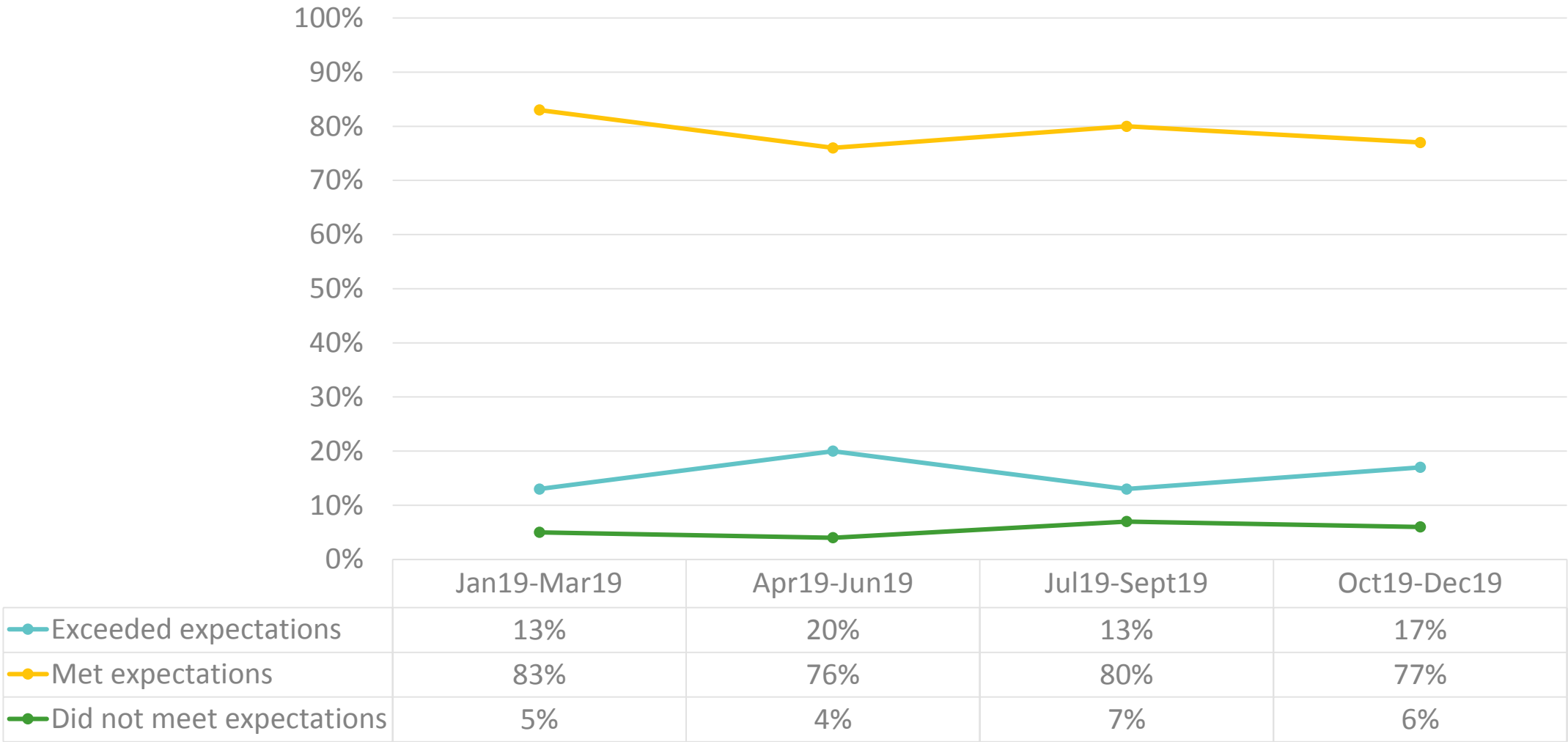
BRAND LOYALTY



TRIP EXPECTATIONS



TRIP EXPECTATIONS – TRACKING



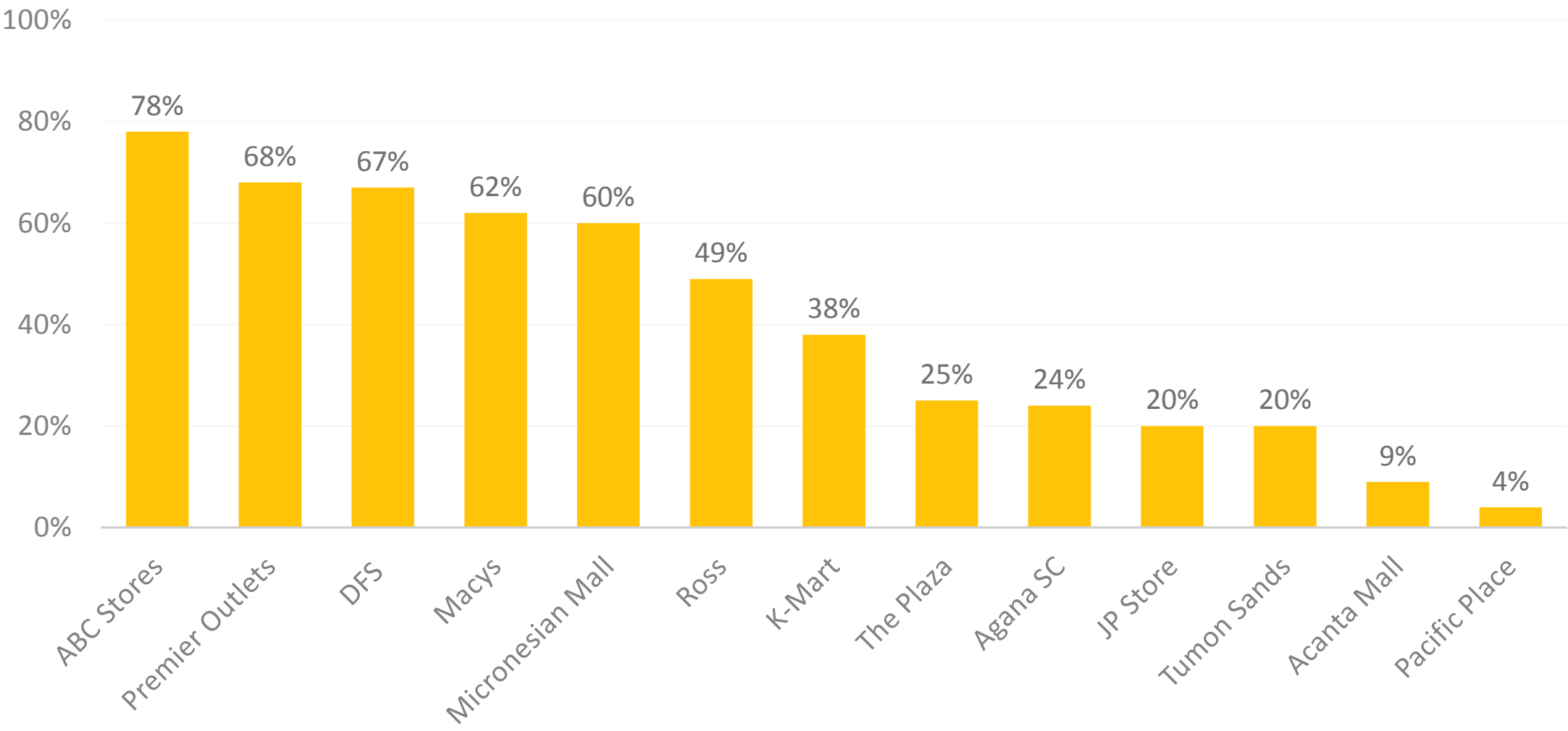


SECTION 5

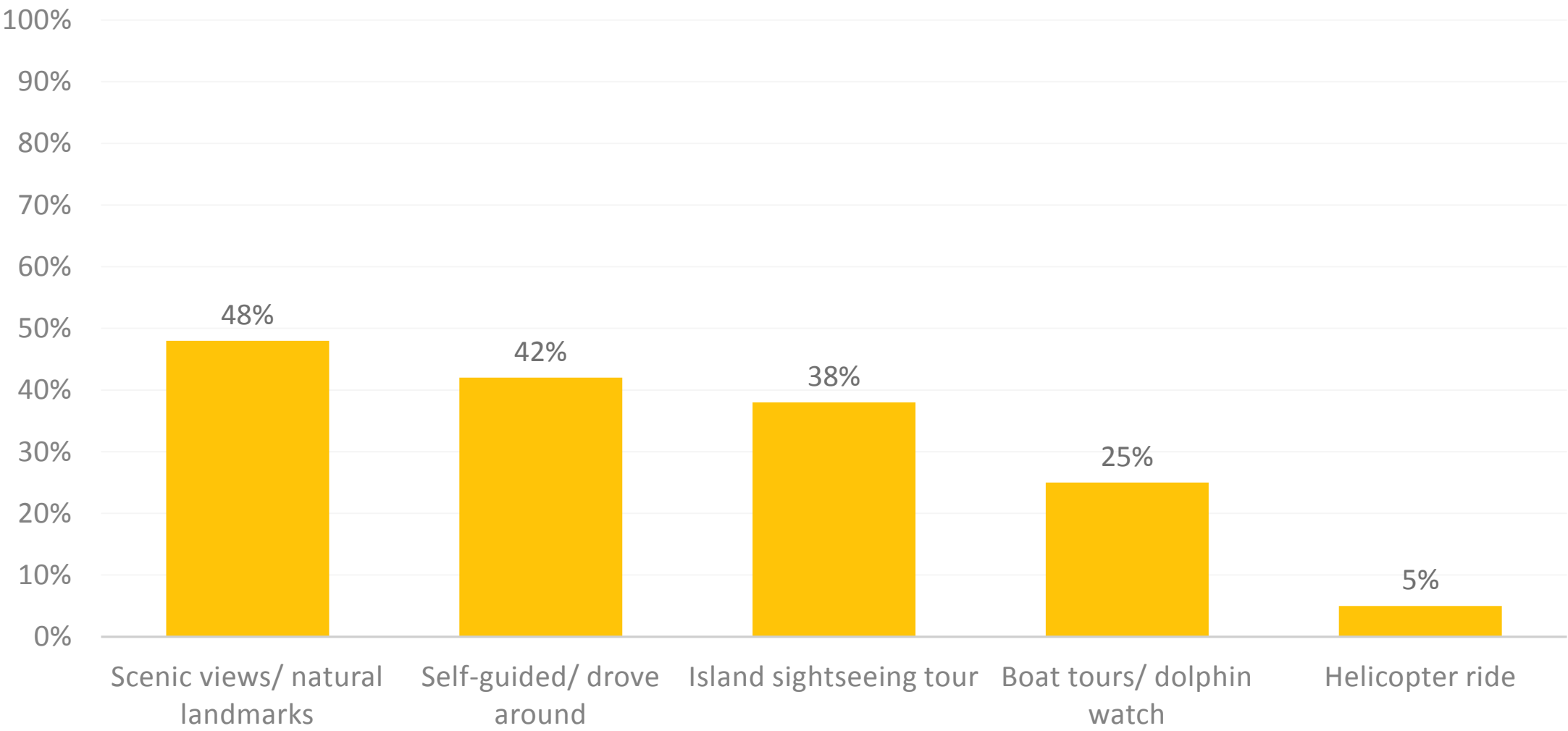
VISITOR ACTIVITIES



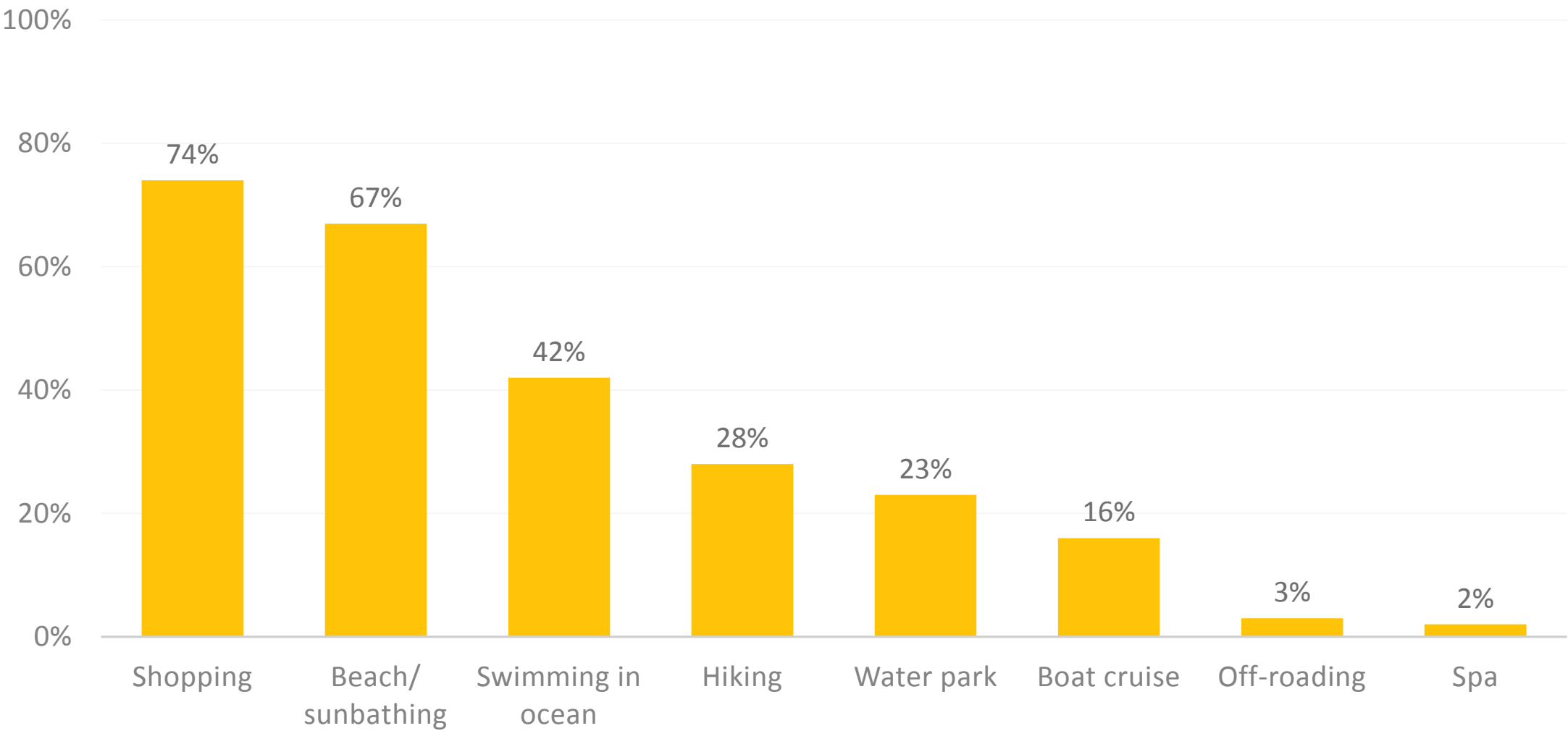
SHOPPING AREAS – PENETRATION



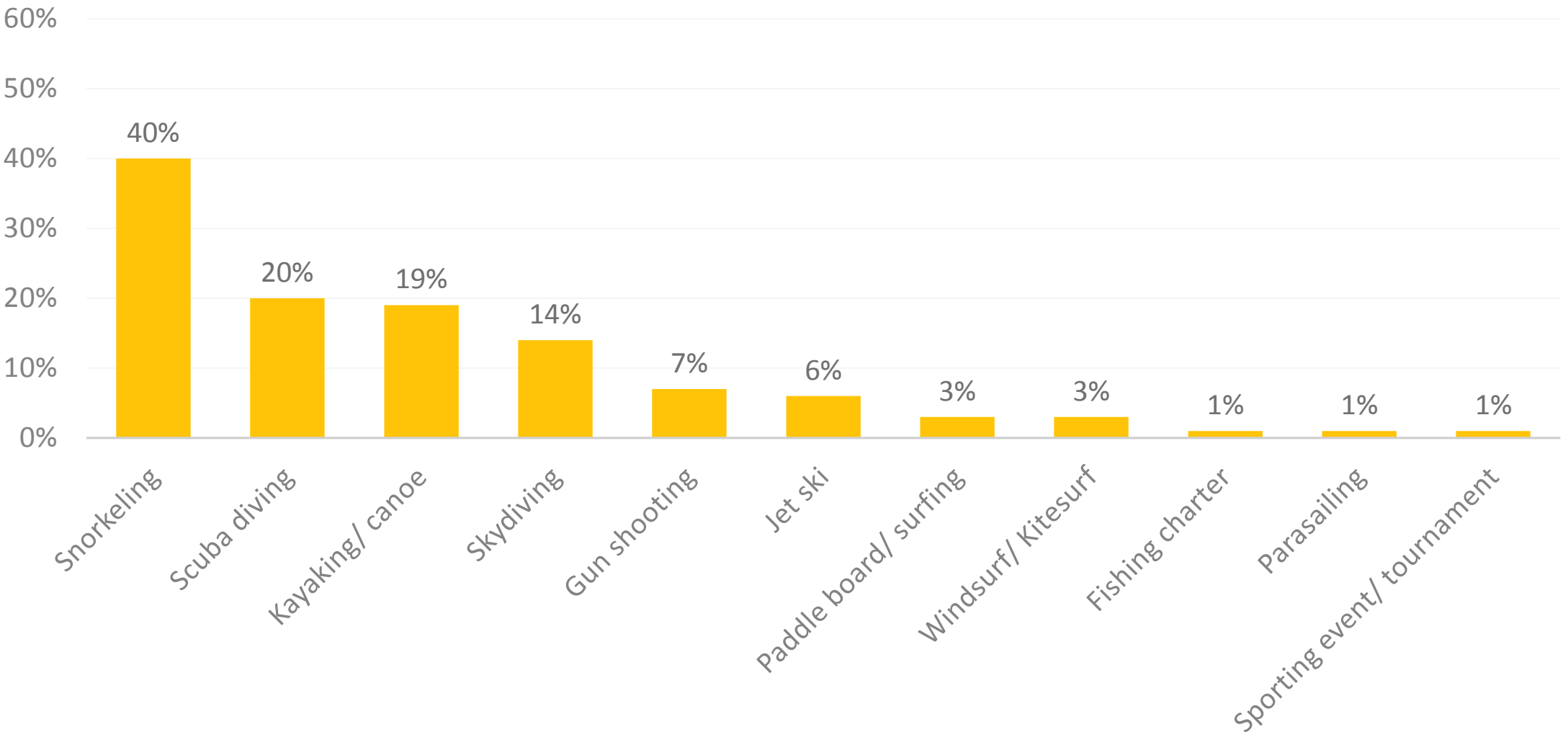
ACTIVITIES – SIGHTSEEING



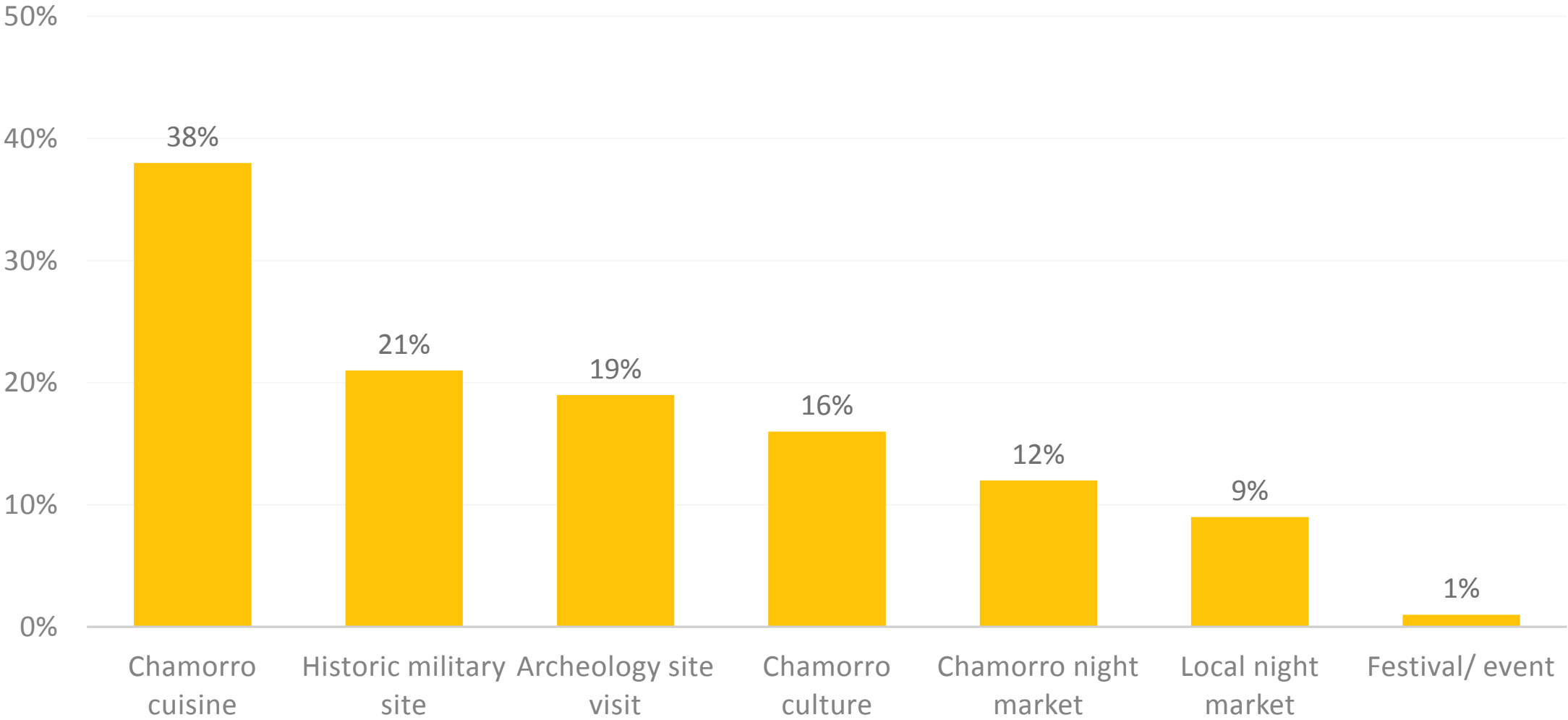
ACTIVITIES – RECREATION



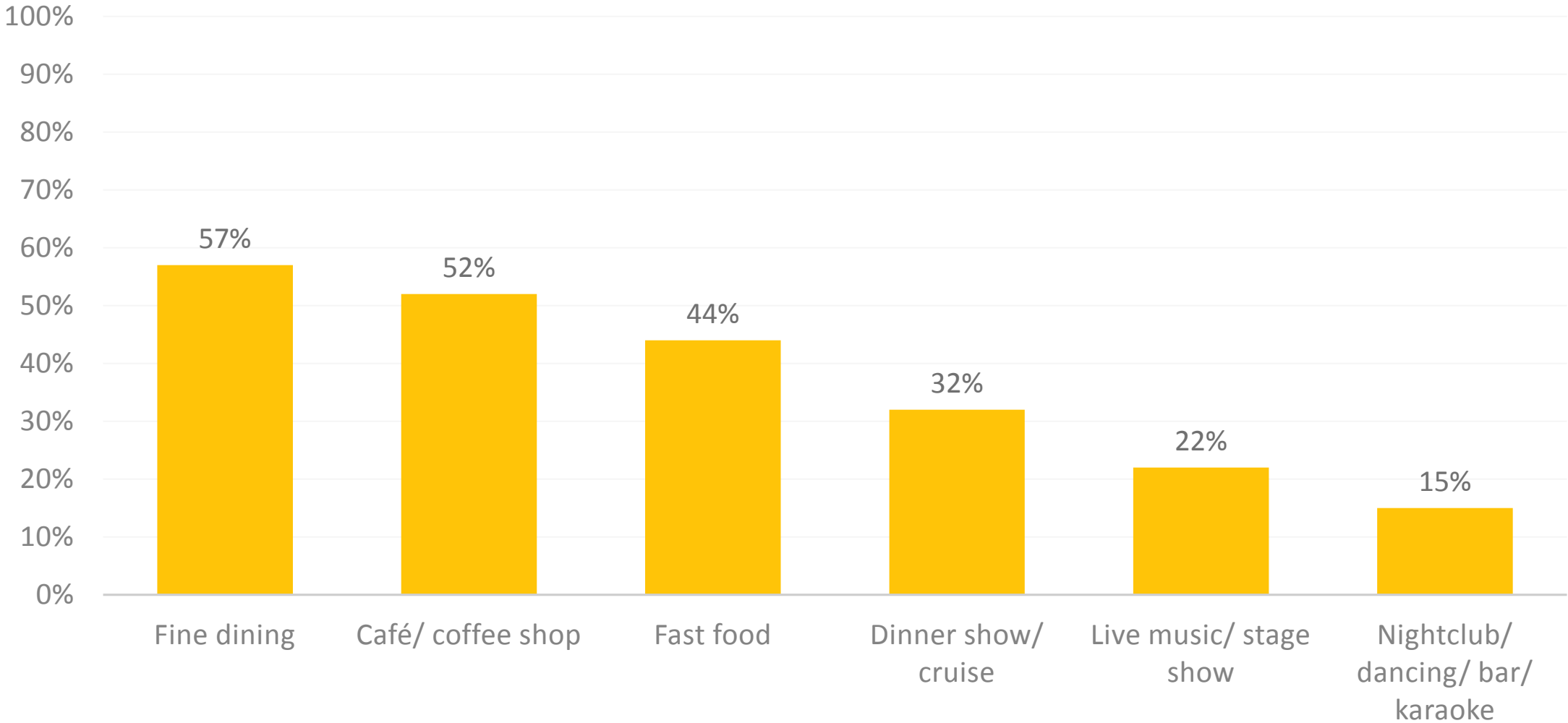
ACTIVITIES – SPORTS



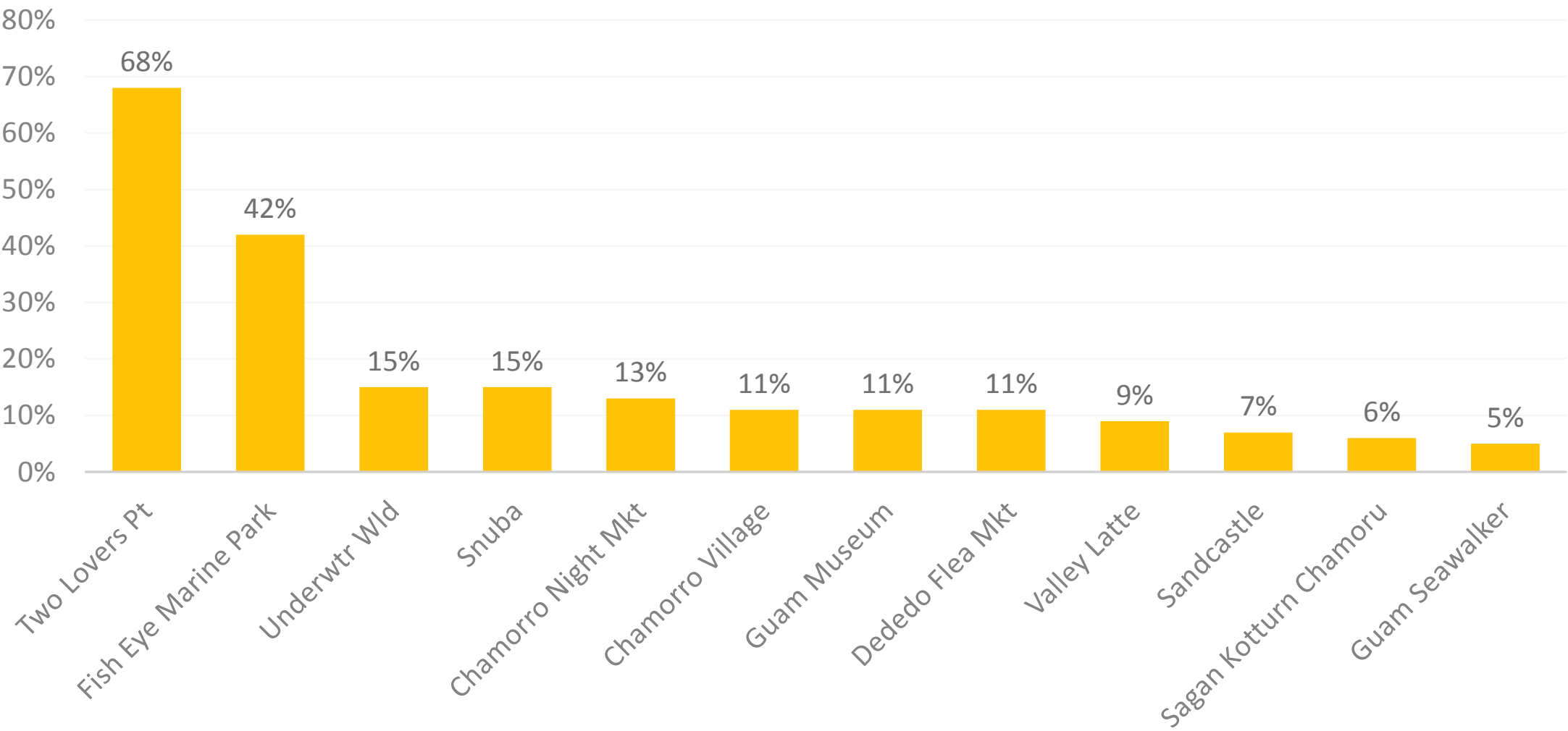
ACTIVITIES – HISTORY, CULTURE, ARTS



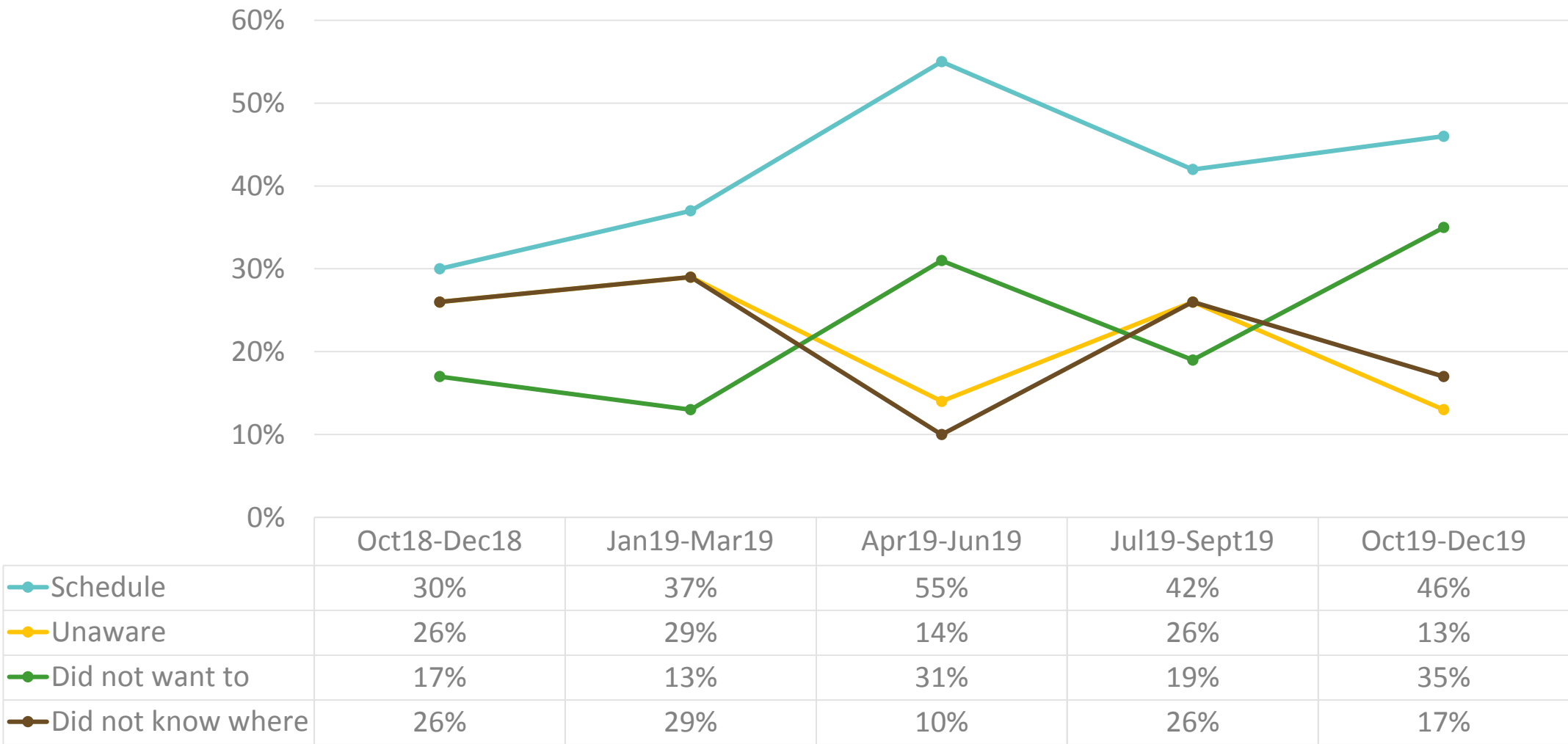
ACTIVITIES – ENTERTAINMENT & DINING



LOCAL ATTRACTIONS – TOP RESPONSES (5%+)



LOCAL CULTURE – OBSTACLES



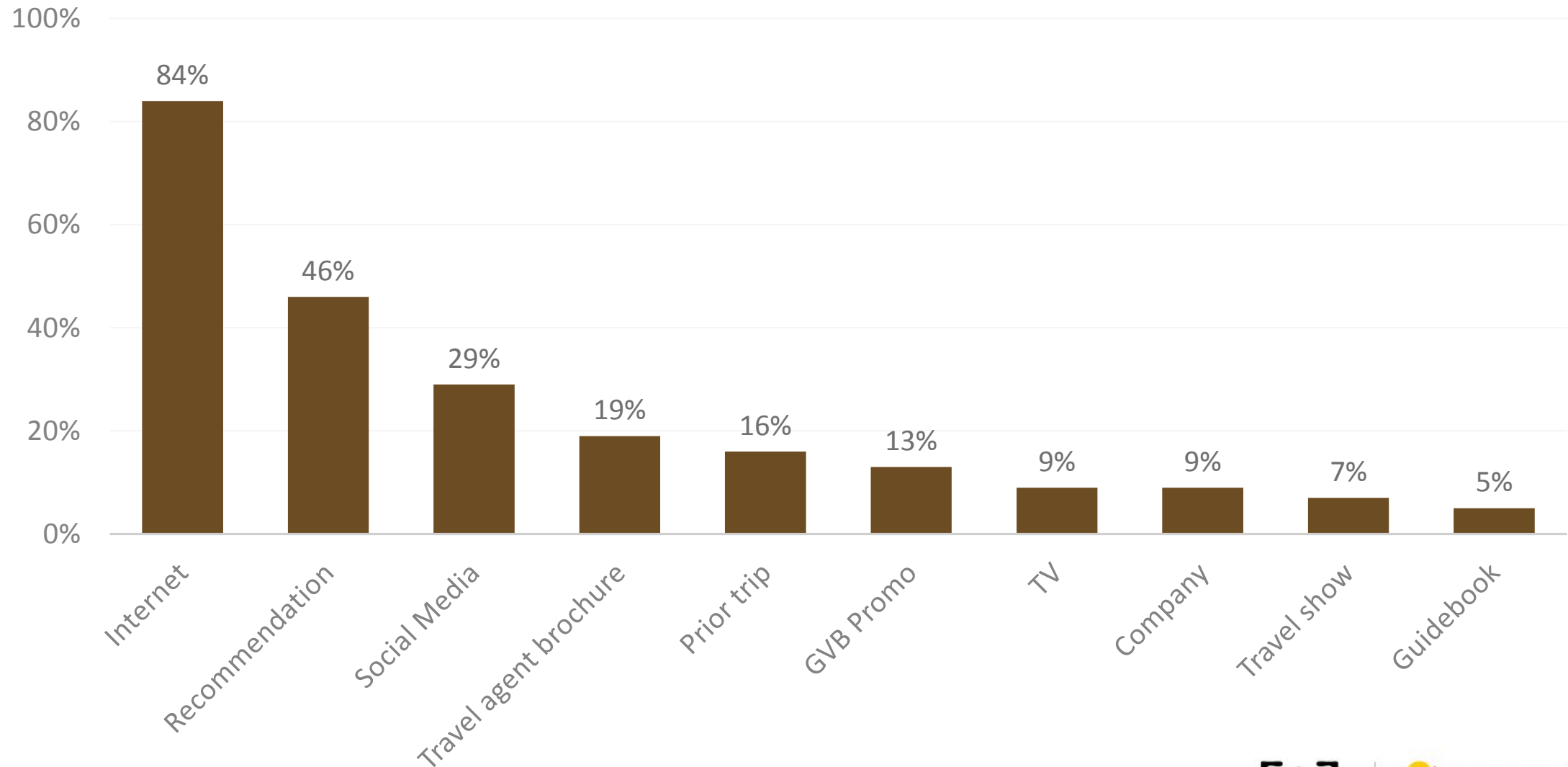


SECTION 6

SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION - SEGMENTATION

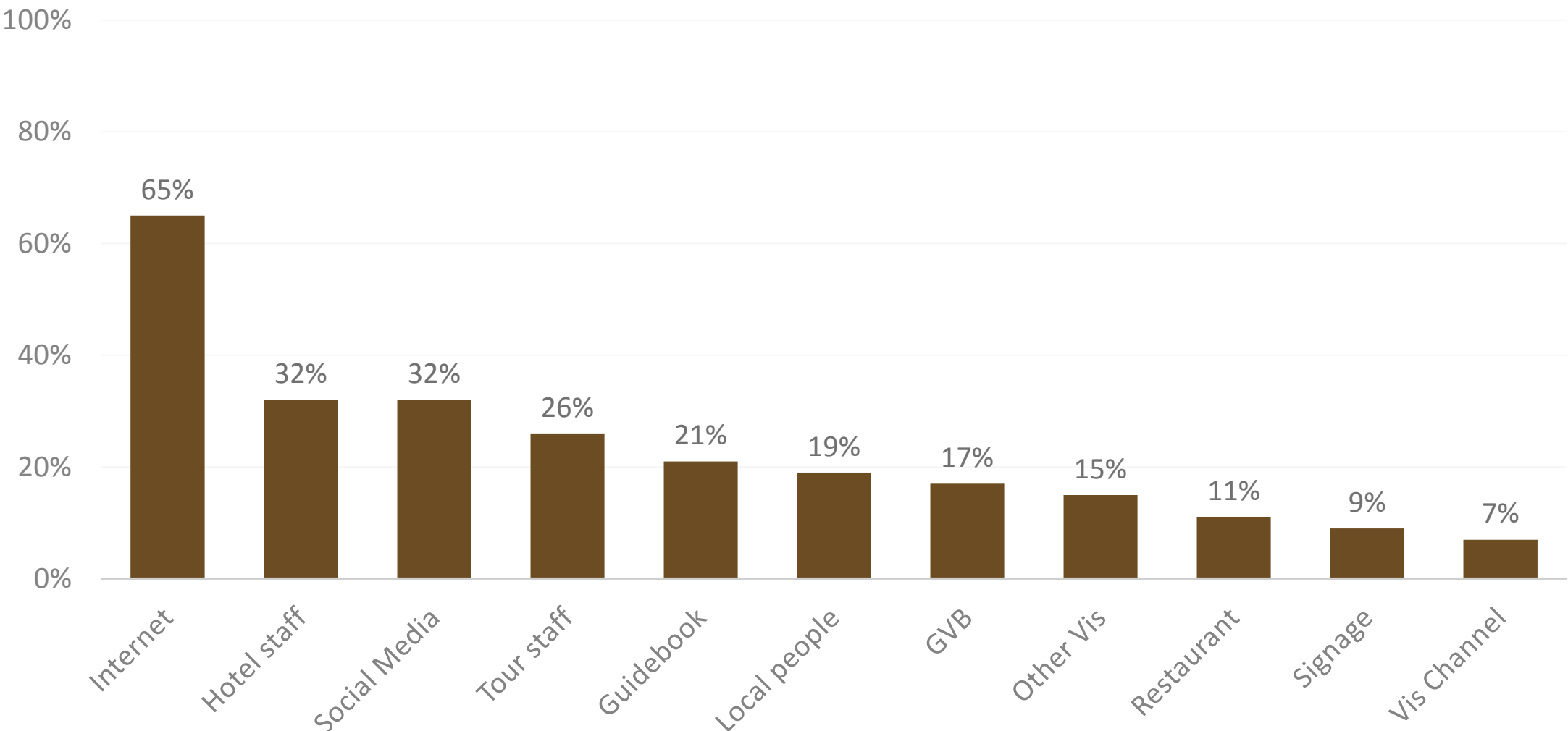
GVB VISITOR SATISFACTION STUDY

Q5 Please select the top three sources of information you used to find out about Guam before your trip

		TOTAL	SPORTS/ ADVENTURE	MICE	HONEYMOON	WEDDING
		-	-	-	-	-
Q5	Internet/Mobile App	84%	88%	83%	83%	89%
	Friend or relative	46%	45%		42%	78%
	Social media	29%	29%	17%	17%	22%
	Travel agent brochure	19%	21%	83%	42%	44%
	I have been to Guam before	16%	9%		8%	22%
	Guam Visitors Bureau promotional activities	13%	18%	33%		
	TV	9%	14%		17%	22%
	Co-worker/ company travel department	9%	11%	17%	8%	
	Consumer travel shows	7%	9%			11%
	Travel guide book at bookstores	5%	5%		8%	11%
	Travel trade shows	4%	3%			
	Guam Visitors Bureau office	3%	4%		8%	
	Magazine (consumer)	3%	3%			
	Newspaper	1%	1%	17%		
	Radio	1%	1%			
	Total	151	101	6	12	9

Prepared by Anthology Research

ONISLE SOURCES OF INFORMATION



ONISLE SOURCES OF INFORMATION

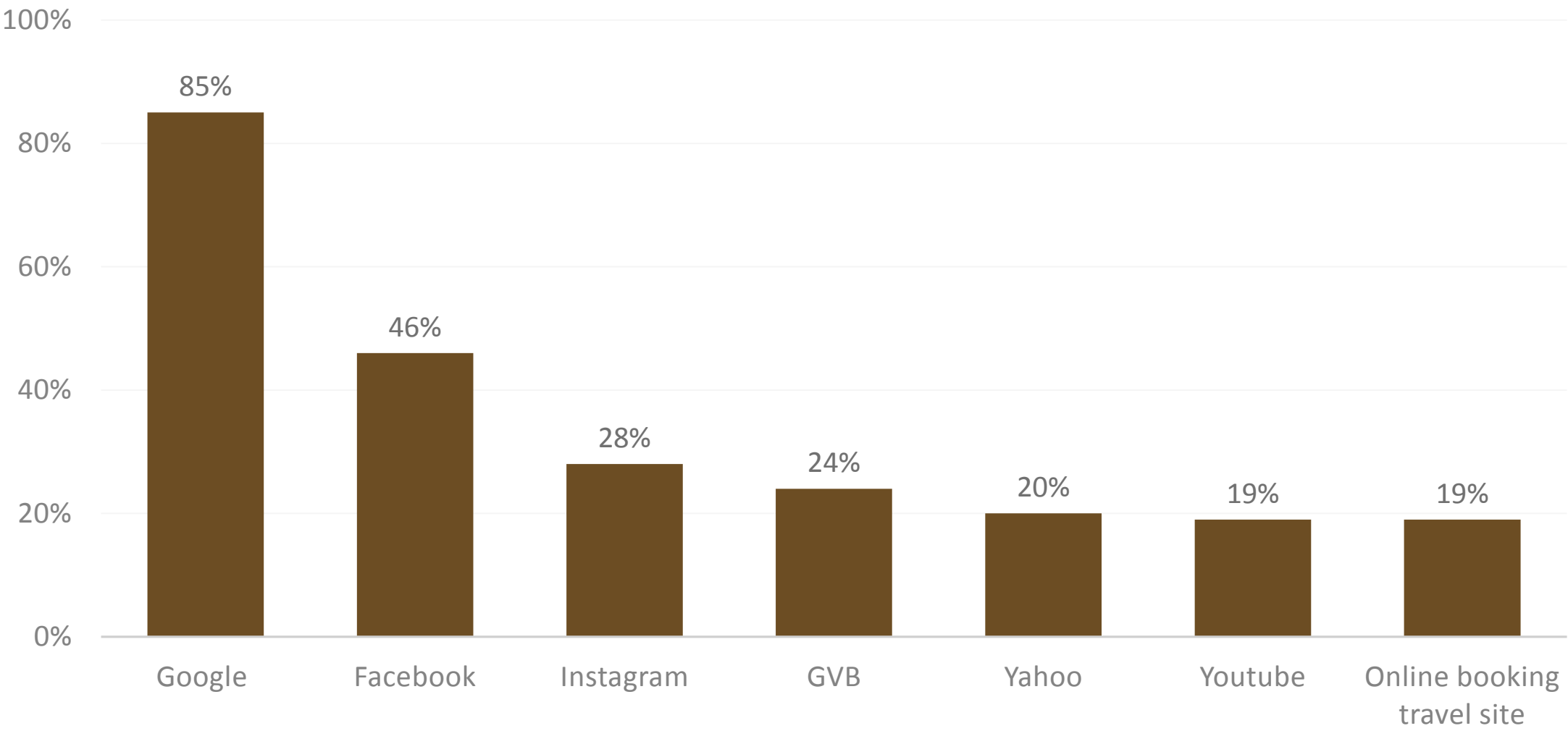
GVB VISITOR SATISFACTION STUDY

Q6 Please select the top three sources of information you used to find out about Guam while you were here

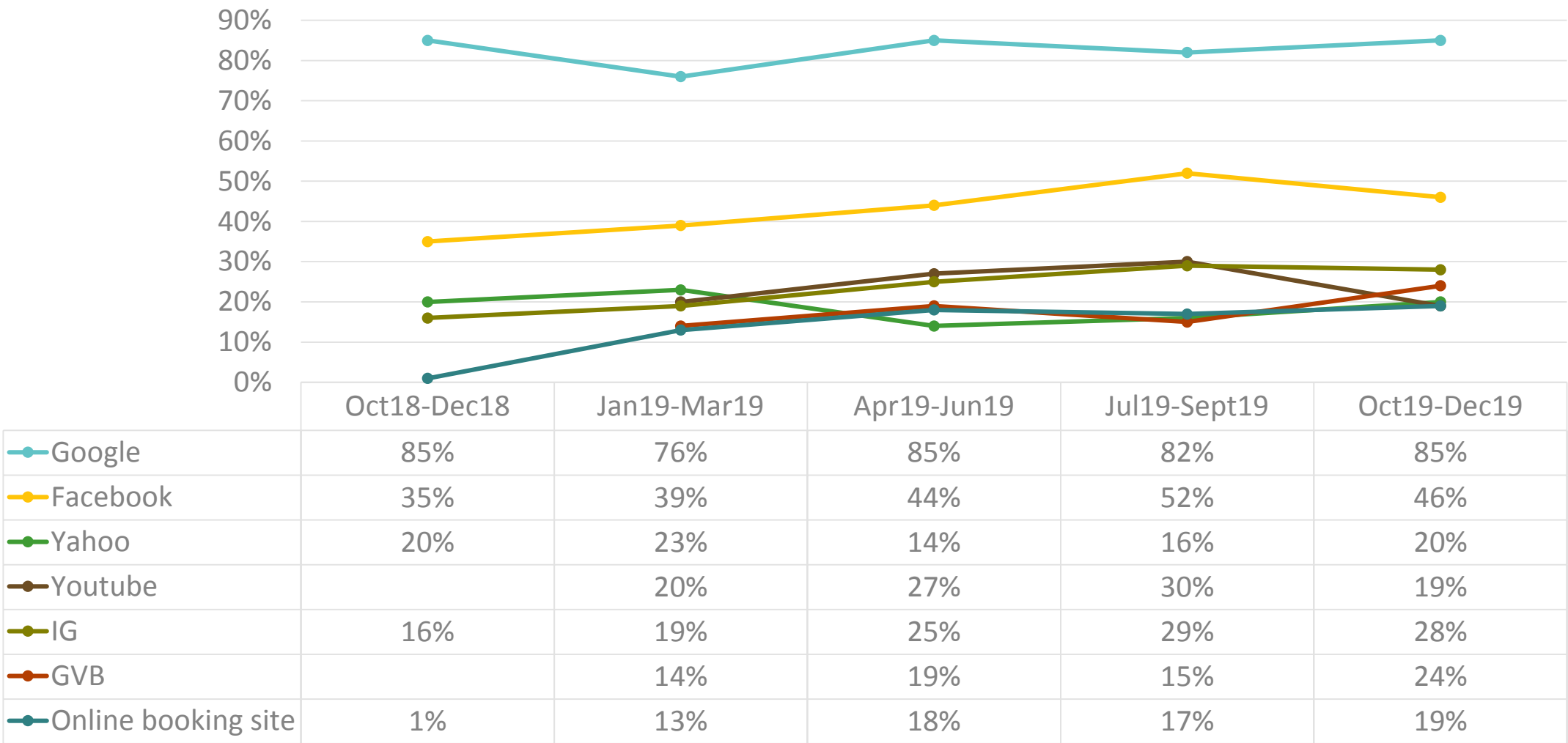
		TOTAL	SPORTS/ ADVENTURE	MICE	HONEYMOON	WEDDING
		-	-	-	-	-
Q6	Internet/ Mobile App	65%	63%	17%	67%	67%
	Hotel staff	32%	33%	33%	17%	11%
	Social Media	32%	29%	33%	25%	11%
	Tour staff	26%	31%	67%	67%	44%
	Guide books I brought with me	21%	24%	17%	25%	33%
	Local people	19%	21%	50%	17%	33%
	Guam Visitors Bureau	17%	18%	17%	17%	
	Other visitors	15%	12%			22%
	Restaurant staff (outside hotel)	11%	13%			11%
	Signs/ advertisement	9%	11%	17%	17%	
	Visitors channel	7%	10%	17%	8%	22%
	Retail staff	3%	3%			11%
	Taxi drivers	3%	1%			11%
	Local publication	3%	4%			11%
	Total	151	101	6	12	9

Prepared by Anthology Research

ONLINE SOURCES OF INFORMATION



ONLINE SOURCES OF INFORMATION



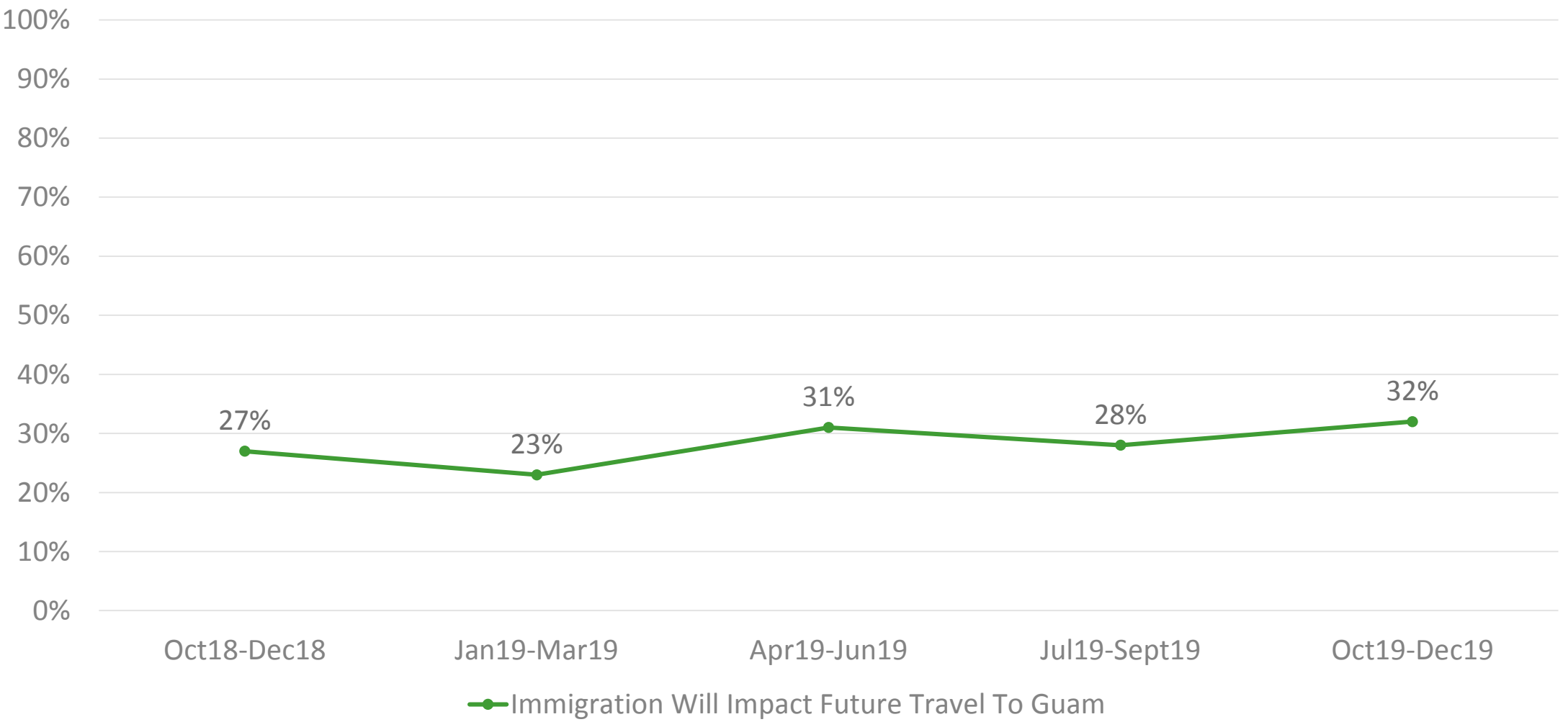


SECTION 7

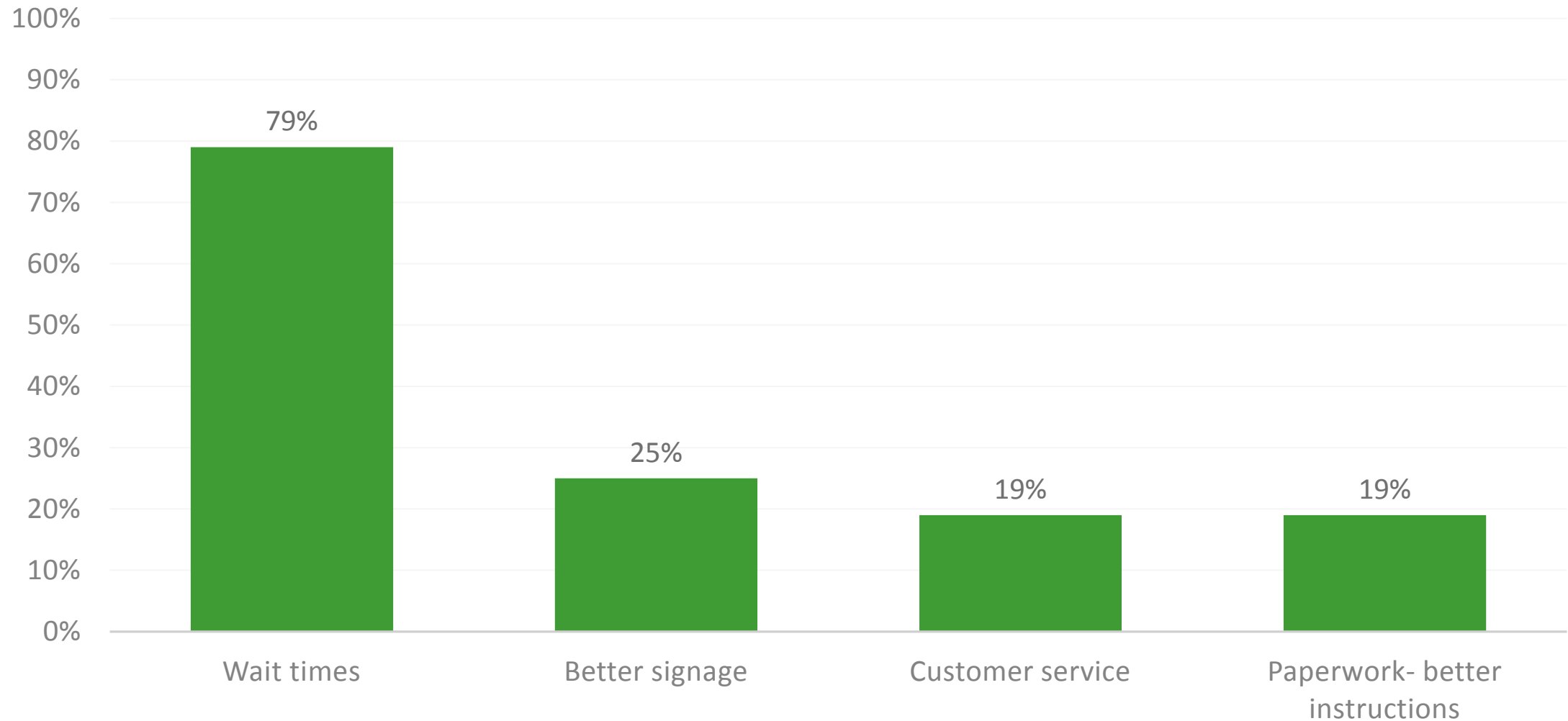
IMMIGRATION



IMPACT OF AIRPORT IMMIGRATION SVC ON FUTURE TRAVEL TO GUAM



AIRPORT – SECURITY/ IMMIGRATION ISSUES





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.
- The predictor variables (drivers) are ranked on the percentage they account for the dependent variable. The top two ranked independent variables generally account for the largest percentages of the dependent variable and are thus the best predictors (drivers) of the dependent variable.

DRIVERS – OVERALL SATISFACTION

Comparison of Drivers of Overall Satisfaction, January - December 2019					
	Jan-Mar 2019	Apr-Jun 2019	Jul-Sept 2019	Oct-Dec 2019	Jan-Dec 2019
Drivers:	rank	rank	rank	rank	rank
Entertainment			1	1	1
Shopping					
Dining	1	1		2	2
Beaches		3			
Parks					
Roads					
Sightseeing Areas		2	2		
Being a safe and secure destination				3	
% of Overall Satisfaction Accounted For	29.4%	30.2%	62.1%	38.6%	31.7%
NOTE: Only significant drivers are included.					

DRIVERS – OVERALL SATISFACTION

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by three significant factors in the Oct-Dec 2019 Period. By rank order, they are:
 - **Entertainment,**
 - **Dining, and**
 - **Being a safe and secure destination.**
- With these factors the overall r^2 is .386, meaning that **38.6% of overall satisfaction is accounted for by these factors.**

DRIVERS – ONISLE EXPENDITURES

Comparison of Drivers of Per Person On Island Expenditures, January - December 2019					
	Jan-Mar 2019	Apr-Jun 2019	Jul-Sept 2019	Oct-Dec 2019	Jan-Dec 2019
Drivers:	rank	rank	rank	rank	rank
Entertainment					
Shopping				1	
Dining					
Beaches					
Parks					
Roads				2	
Sightseeing Areas					
Being a safe and secure destination	1				
% of Overall Satisfaction Accounted For	3.4%	0.0%	0.0%	8.5%	0.0%
NOTE: Only significant drivers are included.					

DRIVERS – ONISLE EXPENDITURES

- **Per Person On Island Expenditure** of Taiwan visitors on Guam is driven by two significant factors in the Oct-Dec 2019 Period. By rank order, they are:
 - **Shopping, and**
 - **Roads.**
- With these factors the overall r^2 is .085, meaning that **8.5% of per person on island expenditures is accounted for by these factors.**