

2018 Annual Survey Report on Visitors Expenditure and Trends in Taiwan

Summary

The Tourism Bureau, MOTC seeks to understand the motives, viewpoints, tendencies and consumption of the inbound visitors in Taiwan in 2018 to supply reference material to tourism-related organizations to improve sightseeing facilities in Taiwan and to plan international tourism advertising and marketing strategies. The survey can be a source of information to estimate visitor expenditures. We surveyed visitors as they were about to leave Taiwan at the Taiwan Taoyuan International Airport, Kaohsiung International Airport, Taipei Songshan Airport, and the Taichung International Airport.

The targets of this survey were the foreign and overseas Chinese inbound visitors from January 1 to December 31, 2018 (excluding the foreign and overseas Chinese transit visitors). This survey adopted the method of “Quota Sampling”, which conformed best to the control of working standards and the characteristics of the samples to achieve random and sample representatives. The number of valid samples was 7,225 persons in total.

The major investigative results of this survey were classified into “Related Indices of the Inbound Visitors in Taiwan”, “Analysis of the Inbound Visitors’ Plans”, “Analysis of the Inbound Visitors’ Behavior”, “Analysis of the Inbound Visitors’ Consumption”, “Analysis of the Inbound Visitors’ Satisfaction”, “Analysis of Basic Information of the Inbound Visitors” and “Analysis Findings”.

I. Related Indices of the Inbound Visitors in Taiwan

| | |
|-------------------------------|---|
| 11,066,707 persons.... | Number of inbound visitors; an increase of 3.05% from the previous year. |
| 6.46 nights..... | Average length of stay (nights) for all inbound visitors; an increase of 0.07 nights of the previous year. |
| US\$191.70..... | Average daily expenditures per visitor; an increase of 6.83% from the previous year. |
| US\$13,705 million.... | Total annual amount of visitor expenditures in tourism; an increase of 11.29% from the previous year. |
| US\$1,238..... | Per capita inbound visitor spending; an increase of 7.93% from the previous year. |
| 97%..... | Overall satisfaction of inbound visitors as a percentage of the total; almost the same as the previous year. |
| 41%..... | Percentage of inbound visitors that had revisited Taiwan in the past three years; almost the same as the previous year. |

Table 1 Related Indices of the Inbound Visitors in Taiwan from 2016 to 2018

| Year | | | |
|---|---|---|---|
| Index | 2018 | 2017 | 2016 |
| Number of inbound visitors | 11,066,707 persons | 10,739,601 persons | 10,690,279 persons |
| Average length of stay for all inbound visitors | 6.46 nights | 6.39 nights | 6.49 nights |
| Average daily expenditures per visitor | US\$191.70 (NT\$5,781) | US\$179.45 (NT\$5,462) | US\$192.77 (NT\$6,230) |
| Total annual amount in visitor expenditures in tourism (the fee of international airline was excluded) | US\$13,705 million (NT\$413,282 million) | US\$12,315 million (NT\$374,855 million) | US\$13,374 million (NT\$432,233 million) |
| Per capita inbound visitor spending | US\$1,238 (NT\$37,345) | US\$1,147 (NT\$34,904) | US\$1,251 (NT\$40,432) |
| Overall satisfaction of inbound visitors as a percentage of the total | 97.38% | 97.58% | 98.16% |
| Percentage of inbound visitors that had revisited Taiwan | 41.05% | 40.83% | 37.47% |

II. Analysis of the Inbound Visitors' Plans

A. 60% of the inbound visitors had seen the advertisements or read reports about Taiwan before coming here. The visitors indicated that their vacation travel planning was often done through word-of-mouth recommendations from friends or relatives, the internet, tourism leaflets of travel agencies, TV/radio, or newspapers/magazines/books.

The percentage of the inbound visitors who had seen the advertisements or read reports about Taiwan before coming here was 60.39%. The sources of the advertisements and reports mentioned above were mostly the internet (65 persons per hundred), word-of-mouth recommendations from friends or relatives (30 persons per hundred), and TV/radio (27 persons per hundred).

The higher percentages of inbound visitors who had seen the advertisements or read reports include the inbound visitors with sightseeing purpose (65.92%), as well as the inbound visitors coming from Singapore (76.29%), Vietnam (76.30%), Malaysia (69.90%), Japan (69.57%), Thailand (64.88%), Phillipines (62.42%), Mainland China (59.51%), Hong Kong/Macao (58.66%), and Indonesia (57.81%).

The visitors indicated that their vacation travel planning was often done through word-of-mouth recommendations from friends or relatives, the internet, tourism leaflets of travel agencies, TV/radio, and newspapers/magazines/books (with the mean larger than 3.50).

Table 2 Percentage of the inbound visitors who had read seen the advertisements or read reports about Taiwan before coming here in 2018

| Main Purpose | Percentage | Unit: % |
|--|--------------|---------|
| All purposes | 60.39 | |
| Sightseeing | 65.92 | |
| Business | 33.55 | |
| International conference or exhibition | 39.74 | |
| Visiting friends or relatives | 55.20 | |
| Studies | 55.56 | |
| Medical treatment | 57.14 | |
| Others | 49.07 | |

Table 3 How much the inbound visitors were influenced by the media in making their decision to visit Taiwan in 2018

| Item | News-papers magazines | | Advertisement on subways/buses | | TV/radio | | International travel Exhibitions | | Outdoor advertisements or billboards | | Tourism leaflets of travel agencies | | Word-of-mouth recommendations from friends or relatives | | Internet | |
|-------------------------------------|-----------------------|------|--------------------------------|------|-------------|------|----------------------------------|------|--------------------------------------|------|-------------------------------------|------|---|------|-------------|------|
| | Mean | SD | Mean | SD | Mean | SD | Mean | SD | Mean | SD | Mean | SD | Mean | SD | Mean | SD |
| All purposes | 3.51 | 1.14 | 3.02 | 1.25 | 3.59 | 1.09 | 3.03 | 1.27 | 2.91 | 1.30 | 4.02 | 1.19 | 4.40 | 0.82 | 4.24 | 0.94 |
| Sightseeing | 3.59 | 1.09 | 2.93 | 1.23 | 3.69 | 1.03 | 3.04 | 1.28 | 2.94 | 1.32 | 4.09 | 1.13 | 4.34 | 0.80 | 4.31 | 0.85 |
| Business | 3.21 | 1.32 | 3.07 | 1.28 | 3.27 | 1.08 | 3.00 | 1.32 | 2.86 | 1.68 | 3.00 | 1.35 | 4.04 | 1.19 | 3.80 | 1.19 |
| International conference/exhibition | 3.50 | 1.38 | 5.00 | -- | 3.33 | 0.58 | 4.00 | -- | 3.00 | -- | 2.50 | 2.12 | 4.42 | 0.79 | 4.33 | 1.06 |
| Visiting friends or relatives | 2.96 | 1.26 | 3.29 | 1.37 | 3.11 | 1.32 | 2.77 | 1.30 | 2.81 | 1.12 | 3.25 | 1.33 | 4.68 | 0.67 | 4.04 | 1.22 |
| Studies | 4.00 | -- | - | - | 4.00 | -- | 4.00 | -- | 3.50 | 0.71 | - | - | 4.33 | 1.15 | 4.47 | 0.83 |
| Medical treatment | 2.00 | 1.41 | 3.00 | -- | 2.67 | 1.03 | - | - | 1.00 | -- | 1.00 | -- | 4.80 | 0.45 | 3.71 | 0.76 |
| Others | 4.33 | 0.82 | 3.75 | 1.16 | 3.40 | 1.27 | 3.25 | 0.96 | 2.50 | 2.12 | 2.80 | 1.93 | 4.29 | 1.14 | 3.94 | 1.26 |

Note: 1. SD means standard deviation.

2. Likert 5 point scale: 1= not at all, 2= somewhat, 3= a little, 4= a lot, 5= entirely.

3. The sample sizes of two purposes - "studies" and "medical treatment" are less than 30, the figures listed as reference.

4. "Others" contains many different purposes, the figures listed as reference.

B. “Gourmet food or delicious snacks”, “scenery”, and “shopping” were the major reasons that attracted the inbound visitors to take a sightseeing trip to Taiwan.

The reasons that the inbound visitors went sightseeing in Taiwan were mainly gourmet food or delicious snacks (69 persons per hundred), scenery (65 persons per hundred), shopping (26 persons per hundred), Taiwan’s customs and culture (16 persons per hundred), geographical convenience (14 persons per hundred), fruits (14 persons per hundred), and friendliness of people (14 persons per hundred).

Table 4 Reasons why the inbound visitors decided to take sightseeing trips to Taiwan in 2018

Unit: persons per hundred

| Item | Gourmet food or delicious snacks | Scenery | Shopping | Taiwan’s customs and culture | Geographical convenience | fruits | Friendliness of people | Historical relics |
|--------------------|----------------------------------|---------|----------|------------------------------|--------------------------|--------|------------------------|-------------------|
| Relative Frequency | 69.00 | 64.95 | 25.99 | 16.12 | 14.29 | 14.02 | 13.65 | 11.26 |

Note: Visitors interviewed were allowed to choose more than one item in this question.

C. 27% of the inbound visitors with sightseeing as their purpose chose to make their trip as a “group tour arranged through a travel agency”.

A total of 40.04% of the inbound visitors visiting Taiwan chose “Individual tour arranged through a travel agency only for booking accommodations (and tickets)”. Another 38.08% of the inbound visitors visiting Taiwan chose “Without any arrangements through travel agencies for booking accommodations (and tickets); no arrangements by a Taiwan travel agency after arrival”.

In terms of the main purpose, 40.21% the inbound visitors with sightseeing as their purpose chose “Individual tour arranged through a travel agency only for booking accommodations (and tickets)”, 30,64% of them chose “Without any arrangements through travel agencies for booking accommodations (and tickets); no arrangements by a Taiwan travel agency after arrival”. And 50.77% of the inbound visitors with business as their purpose chose “Individual tour arranged through a travel agency only for booking accommodations (and tickets) ”.

Table 5 Kinds of arrangements the inbound visitors made on their trips in 2018
- according to the main purpose

Unit: row %

| Main Purpose | Total | Tour group | Non-tour-group | | | |
|--------------------------------|--------|---|--|--|---|--|
| | | Group tour arranged through a travel agency | Individual tour arranged through a travel agency | Individual tour arranged through a travel agency only for booking accommodations (and tickets) | Without any arrangements through travel agencies for booking accommodations (and tickets); joined the activities arranged by a Taiwan travel agency after arrival | Without any arrangements through travel agencies for booking accommodations (and tickets); no arrangements by a Taiwan travel agency after arrival |
| All purposes | 100.00 | 19.42 | 1.73 | 40.04 | 0.73 | 38.08 |
| Sightseeing | 100.00 | 26.80 | 1.53 | 40.21 | 0.82 | 30.64 |
| Business | 100.00 | - | 1.03 | 50.77 | 0.26 | 47.94 |
| Int'l conference or exhibition | 100.00 | - | 2.56 | 64.10 | 1.28 | 32.05 |
| Visiting friends or relatives | 100.00 | - | - | 29.45 | 0.72 | 69.82 |
| Studies | 100.00 | - | 22.22 | 18.52 | - | 59.26 |
| Medical Treatment | 100.00 | - | - | 35.71 | - | 64.29 |
| Others | 100.00 | - | 26.85 | 38.89 | - | 34.26 |

Note: "-" means no visitor in the sample.

D. 96% of the inbound visitors surfed the Internet during their stay in Taiwan. "Free WiFi" was their major way to connect to the Internet.

96% of the inbound visitors surfed the Internet during their stay in Taiwan. The ways that the inbound visitors connect to the Internet were mainly "Free WiFi" (62 persons per hundred), SIM card (39 persons per hundred), international roaming (16 persons per hundred), and router (13 persons per hundred).

Table 6 How did inbound visitors surfed the Internet during their stay in Taiwan

Unit: persons per hundred

| Item | Relative Frequency |
|-----------------------|--------------------|
| Free WiFi | 62.11 |
| iTaiwan Free WiFi | 24.21 |
| Other Free WiFi | 50.37 |
| SIM card | 38.87 |
| International roaming | 15.58 |
| Router | 13.21 |

Note: 1. This is a newly added question.

2. Visitors interviewed were allowed to choose more than one item in this question.

III. Analysis of the Inbound Visitors' Behavior

A. A total of 59% of the inbound visitors was the first time visitors to Taiwan in the past three years.

A total of 58.95% of the inbound visitors was the first time visitors to Taiwan. 67.34% of the inbound visitors with sightseeing purpose were first time visitors to Taiwan, 40.75% of the inbound visitors with business purpose were first time visitors to Taiwan, 48.72% of the inbound visitors with international conference or exhibition purpose were first time visitors to Taiwan.

Table 7 The percentage of the inbound visitors who were first time visitors to Taiwan in the past three years in 2018 - according to the main purpose

| Main Purpose | First time visitors to Taiwan |
|--|-------------------------------|
| All purposes | 58.95 |
| Sightseeing | 67.34 |
| Business | 40.75 |
| International Conference or Exhibition | 48.72 |
| Visiting friends or relatives | 32.75 |
| Studies | 55.56 |
| Medical Treatment | 17.86 |
| Others | 37.96 |

B. “Night markets”, “Taipei 101”, “Ximending”, “Jiufen”, “Chiang Kai-Shek Memorial Hall” and “National Palace Museum”, were the major scenic spots for the inbound visitors.

The major scenic spots in the inbound visitors visited were night markets (81 persons per hundred), Taipei 101 (51 persons per hundred), Ximending (40 persons per hundred), Jiufen (37persons per hundred), Chiang Kai-Shek Memorial Hall (33 persons per hundred), and National Palace Museum (33 persons per hundred), etc.

The inbound visitors with sightseeing, business and international conference or exhibition as their purpose mostly visited “Shilin night market (41 persons per hundred)”, and “Raohe Street Tourist Night Market (15 persons per hundred)”.

Table 8 Ranking of the major scenic spots inbound visitors visited in 2018

Unit: persons per hundred

| Ranking | Scenic spot | Relative persons | Ranking | Scenic spot | Relative persons |
|---------|-------------------------------|------------------|---------|------------------------|------------------|
| 1 | Night markets | 80.61 | 6 | National Palace Museum | 32.91 |
| 2 | Taipei 101 | 51.04 | 7 | Sun Moon Lake | 21.90 |
| 3 | Ximending | 40.39 | 8 | Longshan Temple | 21.23 |
| 4 | Jiufen | 37.09 | 9 | Yehliu | 20.53 |
| 5 | Chiang Kai-Shek Memorial Hall | 32.98 | 10 | Tamsui | 19.13 |

Note: Each visitor was asked to list at most 15 most impressed scenic spots for those he has visited. And the figures in the table were calculated from those listed scenic spots.

C. “Kenting National Park” was the favorite scenic spot for the inbound visitors.

The favorite scenic spot for the inbound visitors was “Kenting National Park” (29.11%), followed by “Jiufen”, “Sun Moon Lake”, “Taroko,Tienhsiang”, “Alishan”, “Pingxi”, “Yehliu”, and “Tamsui” (all over 18%).

Table 9 Ranking of the favorite scenic spots the inbound visitors visited in 2018

| Ranking | Scenic spot | Relative persons | Percentage favoring the scenic spot | Ranking | Scenic spot | Relative persons | Percentage favoring the scenic spot |
|---------|-----------------------|------------------|-------------------------------------|---------|------------------------|------------------|-------------------------------------|
| 1 | Kenting National Park | 15.74 | 29.11% | 6 | Pingxi | 17.90 | 20.80% |
| 2 | Jiufen | 37.09 | 28.25% | 7 | Yehliu | 20.53 | 20.16% |
| 3 | Sun Moon Lake | 21.90 | 27.05% | 8 | Tamsui | 19.13 | 18.52% |
| 4 | Taroko, Tienhsiang | 15.21 | 23.02% | 9 | National Palace Museum | 32.91 | 15.60% |
| 5 | Alishan | 13.91 | 21.89% | 10 | Ximending | 40.39 | 12.23% |

Note:1. Each visitor can choose only one favorite scenic spot for those he has visited.

2. The percentage favoring the scenic spot = (man-time favoring the scenic spot) / (man-time visiting the scenic spot) * 100%

3. Not included in the calculation if the relative persons visiting the scenic spot doesn't exceed 10 (persons per hundred).

D. Taipei City was the major city/county for the inbound visitors.

The major sightseeing cities/counties for the inbound visitors were (in orders): Taipei City (84 persons per hundred), New Taipei City (57 persons per hundred), Nantou County (24 persons per hundred), and Kaohsiung City (21 persons per hundred).

Table 10 Ranking of the major city/county the inbound visitors visited in 2018

Unit: persons per hundred

| Ranking | City/County | Relative persons | Ranking | City/County | Relative persons |
|---------|-----------------|------------------|---------|-------------------|------------------|
| 1 | Taipei City | 84.47 | 12 | Keelung City | 2.67 |
| 2 | New Taipei City | 56.93 | 13 | Taoyuan City | 1.58 |
| 3 | Nantou County | 24.07 | 14 | Changhua County | 0.75 |
| 4 | Kaohsiung City | 21.00 | 15 | Hsinchu County | 0.66 |
| 5 | Hualien County | 16.57 | 16 | Hsinchu City | 0.54 |
| 6 | Pingtung County | 16.12 | 17 | Miaoli County | 0.35 |
| 7 | Chiayi County | 14.28 | 18 | Chiayi City | 0.26 |
| 8 | Taichung City | 13.94 | 19 | Yunlin County | 0.22 |
| 9 | Taitung County | 5.70 | 20 | Penghu County | 0.21 |
| 10 | Tainan City | 4.98 | 21 | Kinmen County | 0.07 |
| 11 | Yilan County | 3.25 | 22 | Lienchiang County | 0.01 |

Note: The figures in the table were calculated from the cities/counties of the scenic spots that the inbound visitors have visited .

Table 11 Ranking of the major area the inbound visitors visited in 2018

Unit: persons; persons per hundred

| Ranking | Area | Relative persons |
|---------|------------------|------------------|
| 1 | Northern Taiwan | 86.82 |
| 2 | Southern Taiwan | 30.62 |
| 3 | Central Taiwan | 29.74 |
| 4 | Eastern Taiwan | 17.18 |
| 5 | Offshore islands | 0.29 |

Note: 1. The figures in the table were calculated from the areas of the scenic spots that the inbound visitors have visited.

2. Northern Taiwan: Taipei City, Keelung City, New Taipei City, Yilan County, Taoyuan City, Hsinchu County, Hsinchu City.

Central Taiwan: Miaoli County, Taichung City, Changhua County, Nantou County, Yunlin County.

Southern Taiwan: Chiayi County, Chiayi City, Tainan City, Kaohsiung City, Pingtung County.

Eastern Taiwan: Taitung County, Hualien County.

Offshore islands: Kinmen County, Lienchiang County, Penghu County.

E. “Shopping”, “night market sightseeing” and “historical relics sightseeing” were the major activities of the inbound visitors in Taiwan.

Favorite activities for the inbound visitors visiting Taiwan were shopping (94 persons per hundred), night markets sightseeing (81 persons per hundred), historical relics sightseeing (41 persons per hundred), exhibitions (31 persons per hundred), and lake tour (16 persons per hundred).

Table 12 Ranking of the activities the inbound visitors participated in 2018

Unit: persons per hundred

| Ranking | Item | Relative persons | Ranking | Item | Relative persons |
|---------|-------------------------------|------------------|---------|--|------------------|
| 1 | Shopping | 94.34 | 10 | Pubs or night clubs | 1.77 |
| 2 | Night market sightseeing | 80.61 | 11 | Festival activities | 1.44 |
| 3 | Historical relics sightseeing | 40.57 | 12 | Sports or sporting competitions | 1.13 |
| 4 | Exhibitions | 31.02 | 13 | Karaoke or K.T.V | 1.00 |
| 5 | Lake tour | 16.36 | 14 | Culture events | 0.69 |
| 6 | Hot spring soaking | 12.54 | 15 | Skin care treatment or manicure nail art | 0.50 |
| 7 | Eco tour | 9.62 | 16 | Health care | 0.44 |
| 8 | Massage or acupressure | 8.64 | 17 | SPA, sauna | 0.43 |
| 9 | Theme park | 3.49 | 18 | Taking wedding or salon shots | 0.25 |

Note: Visitors interviewed were allowed to choose more than one item in this question.

IV. Analysis of the Inbound Visitors' Consumption

- A. The amount of total annual income of visitor expenditure was up 11.29% over 2017, reaching US\$ 13,705 million in 2018; due to the appreciation of New Taiwan Dollar (NTD), this amount in NTD raises 10.25% over 2017, reaching NT\$ 413,282 million in 2018.**

In 2018, the number of inbound visitors was 11,066,707 persons, an increase of 3.05% from the previous year. The average length of stay (nights) for all inbound visitors was 6.46 nights; an increase of 0.07 nights of the previous year. The average daily expenditures per visitor visiting Taiwan was US\$191.70, an increase of 6.83% from the previous year. The amount of total annual income of visitor expenditure was up 11.29% over 2017, reaching US\$ 13,705 million in 2018; due to the appreciation of New Taiwan Dollar (NTD) (with annual appreciation of 0.93%), this amount in NTD raises 10.25% over 2017, reaching NT\$ 413,282 million in 2018.

In 2018, the average daily expenditures per visitor visiting Taiwan was US\$ 191.70. The amounts and proportions of the components of expenditure, from highest to lowest were as follows: hotel bills amount were US\$66.00 (34.43%), shopping amount was US\$56.52 (29.48%) and meals excluding hotel meals amount were US\$39.67 (20.69%) etc.

According to the analysis of the 4 main purposes (sightseeing, business, international conference or exhibition, and visiting friends or relatives), the average daily expenditures of the inbound visitors with international conference or exhibition purpose were US\$257.21 per person which was higher than the inbound visitors with business purpose (US\$216.53 per person), sightseeing purpose (US\$200.32 per person), and visiting friends or relatives purpose (US\$117.90 per person). As for shopping, the inbound visitors with international conference or exhibition purpose was US\$79.32 per person which was higher than the inbound visitors with other three purposes. Compared with last year, the average daily expenditures of each person of the inbound visitors with four main purposes have increased.

According to the analysis of the 7 main markets, the average daily expenditures per visitor from Japan (US\$219.35) was the highest, then followed by Mainland China (\$211.68), Hong Kong/Macao (US\$202.31), Korea (US\$187.71), New Southbound 18 countries (US\$165.81), U.S.A. (US\$159.42)

and Europe (US\$148.15). In addition, the shopping amounts of the inbound visitors, from highest to lowest were as follows: Mainland China (US\$105.31), Hong Kong/ Macao (US\$60.65), New Southbound 18 countries (US\$47.04), Korea (US\$39.67), Japan (US\$39.13), U.S.A. (US\$20.88) and Europe (US\$11.47).

Compared with last year, in 2018, the average daily expenditures of each person of the inbound visitors was US\$191.70, an increase of US\$12.25 (with annual increase of 6.83%); the details of the components of expenditure showed that, except the amount of hotel bills decreased US\$1.47 (with annual decrease of 2.18%), the amount of all other components are increased, in which the amount of shopping increased most, representing US\$5.71 (with annual increase of 11.24%), and then the amount of meals excluding hotel meals increased US\$5.63 (with annual increase of 16.54%).

Regarding the Japan market, the average daily expenditure of each person of the inbound visitors from Japan was was US\$219.35, an increase of US\$5.30 (with annual increase of 2.48%); the details of the components of expenditure showed that, the amount of meals excluding hotel meals increased most, representing US\$3.95 (with annual increase of 10.48%), then the amount of hotel bills increased US\$2.36 (with annual decrease of 2.32%), while the amount of shopping decreased US\$1.55 (with annual decrease of 3.81%).

Regarding the Mainland China market, the average daily expenditure of each person of the inbound visitors from Mainland China was US\$211.68, an increase of US\$27.30 (with annual increase of 14.81%); the details of the components of expenditure showed that, the amount of all components are increased, in which the amount of shopping increased most, representing US\$22.23 (with annual increase of 26.76%), then the amount of meals excluding hotel meals increased US\$2.64 (with annual increase of 9.52%).

Regarding the Korea market, because of slower economic growth rate in Korea, the average daily expenditure of each person of the inbound visitors from Korea was US\$187.71, an decrease of US\$6.87 (with annual decrease of 3.53%); the details of the components of expenditure showed that, the amount of shopping decreased most, representing US\$6.62 (with annual decrease of 14.30%), then the amount of hotel bills decreased US\$4.07 (with annual decrease of 5.28%), while the amount of meals excluding hotel meals increased most, representing US\$4.23 (with annual increase of 10.27%).

Regarding the Hong Knong/Macao, the average daily expenditures of each person of the inbound visitors was US\$202.31, an increase of US\$18.39 (with annual increase of 10.00%); the details of the components of expenditure showed that, except the amount of hotel bills decreased US\$1.99 (with annual decrease of 3.11%), the amount of all other components are increased, in which the amount of shopping increased most, representing US\$9.35 (with annual increase of 18.23%), and then the amount of meals excluding hotel meals increased US\$8.00 (with annual increase of 19.25%).

Regarding the New Southbound 18 countries, the average daily expenditures of each person of the inbound visitors was US\$165.81, an increase of US\$13.56 (with annual increase of 8.91%); the details of the components of expenditure showed that, except the amount of hotel bills decreased US\$4.14 (with annual decrease of 7.48%), the amount of all other components are increased, in which the amount of meals excluding hotel meals increased most, representing US\$7.51 (with annual increase of 25.34%), then the amount of shopping increased US\$4.61 (with annual increase of 10.86%), and then the amount of local transportation increased US\$3.19 (with annual increase of 18.09%).

Regarding the U.S.A., the average daily expenditures of each person of the inbound visitors was US\$159.42, an increase of US\$3.75 (with annual increase of 2.41%); the details of the components of expenditure showed that, except the amount of hotel bills decreased US\$13.53 (with annual decrease of 17.91%), the amount of all other components are increased, in which the amount of miscellaneous expenses increased most, representing US\$6.77 (with annual increase of 128.46%), then the amount of meals excluding hotel meals increased US\$4.82 (with annual increase of 13.57%), and then the amount of shopping increased US\$3.13 (with annual increase of 17.63%).

Regarding the Europe., the average daily expenditures of each person of the inbound visitors was US\$148.15, an increase of US\$10.96 (with annual increase of 7.99%); the details of the components of expenditure showed that, except the amount of hotel bills decreased US\$0.18 (with annual decrease of 0.24%), and the amount of local transportation decreased US\$0.1 (with annual decrease of 0.53%), the amount of all other components are increased, in which the amount of meals excluding hotel meals increased most, representing US\$8.82 (with annual increase of 32.23%), and then the amount of miscellaneous expenses increased US\$1.81 (with annual increase of 104.02%).

Table 13 The Average daily expenditures per visitor in 2018—according to main purpose

Unit: USD

| Main Purpose | | Total | Hotel Bills | Meals excluding hotel meals | Local transportation | Entertainment | Miscellaneous expenses | Shopping |
|--------------------------------|------------------|---------|-------------|-----------------------------|----------------------|---------------|------------------------|----------|
| All Purposes | Amount of money | 191.70 | 66.00 | 39.67 | 19.30 | 6.06 | 4.15 | 56.52 |
| | Percentage | 100.00% | 34.43% | 20.69% | 10.07% | 3.16% | 2.17% | 29.48% |
| | Amount of growth | 12.25 | -1.47 | 5.63 | 1.23 | 0.48 | 0.67 | 5.71 |
| | Growth rate | 6.83% | -2.18% | 16.54% | 6.81% | 8.60% | 19.25% | 11.24% |
| Sightseeing | Amount of money | 200.32 | 65.15 | 40.33 | 19.48 | 6.57 | 4.04 | 64.75 |
| | Percentage | 100.00% | 32.52% | 20.13% | 9.73% | 3.28% | 2.02% | 32.32% |
| | Amount of growth | 14.88 | -0.38 | 6.76 | 1.40 | 0.44 | 0.50 | 6.16 |
| | Growth rate | 8.02% | -0.58% | 20.14% | 7.74% | 7.18% | 14.12% | 10.51% |
| Business | Amount of money | 216.53 | 117.21 | 41.34 | 25.09 | 4.01 | 2.67 | 26.21 |
| | Percentage | 100.00% | 54.13% | 19.09% | 11.59% | 1.85% | 1.23% | 12.11% |
| | Amount of growth | 0.61 | -2.76 | 1.03 | 0.86 | -0.16 | 0.22 | 1.42 |
| | Growth rate | 0.28% | -2.30% | 2.56% | 3.55% | -3.84% | 8.98% | 5.73% |
| Int'l conference or exhibition | Amount of money | 257.21 | 101.93 | 38.53 | 23.17 | 7.75 | 6.51 | 79.32 |
| | Percentage | 100.00% | 39.63% | 14.98% | 9.01% | 3.01% | 2.53% | 30.84% |
| | Amount of growth | 55.33 | 10.52 | 1.89 | 5.71 | 4.54 | -0.29 | 32.96 |
| | Growth rate | 27.41% | 11.51% | 5.16% | 32.70% | 141.43% | -4.26% | 71.10% |
| Visiting friends or relatives | Amount of money | 117.90 | 27.33 | 32.97 | 12.64 | 3.77 | 7.06 | 34.13 |
| | Percentage | 100.00% | 23.18% | 27.96% | 10.72% | 3.20% | 5.99% | 28.95% |
| | Amount of growth | 9.81 | -0.09 | 3.64 | 0.75 | 0.04 | 3.37 | 2.10 |
| | Growth rate | 9.08% | -0.33% | 12.41% | 6.31% | 1.07% | 91.33% | 6.56% |
| Studies | Amount of money | 124.71 | 33.22 | 23.07 | 14.41 | 12.10 | 26.20 | 15.71 |
| | Percentage | 100.00% | 26.64% | 18.50% | 11.56% | 9.70% | 21.00% | 12.60% |
| | Amount of growth | 37.58 | -0.05 | 4.92 | 3.92 | 8.27 | 18.80 | 1.72 |
| | Growth rate | 43.13% | -0.15% | 27.11% | 37.37% | 215.93% | 254.05% | 12.29% |
| Medical Treatment | Amount of money | 382.51 | 41.11 | 42.11 | 17.83 | 2.03 | 208.09 | 71.34 |
| | Percentage | 100.00% | 10.75% | 11.01% | 4.66% | 0.53% | 54.40% | 18.65% |
| | Amount of growth | -144.43 | -26.09 | 2.11 | 6.07 | -0.09 | -20.05 | -106.38 |
| | Growth rate | -27.41% | -38.82% | 5.28% | 51.62% | -4.25% | -8.79% | -59.86% |
| Others | Amount of money | 187.73 | 56.82 | 29.87 | 15.82 | 16.99 | 10.44 | 57.79 |
| | Percentage | 100.00% | 30.27% | 15.91% | 8.43% | 9.05% | 5.56% | 30.78% |
| | Amount of growth | 29.53 | 5.67 | -4.02 | -1.69 | 0.10 | 5.95 | 23.52 |
| | Growth rate | 18.67% | 11.09% | -11.86% | -9.65% | 0.59% | 132.52% | 68.63% |

Note: 1. There are only 27 visitors with studies purpose, the figures listed as reference. The Miscellaneous expense includes tuition fee.

2. There are only 28 visitors with medical treatment purpose, the figures listed as reference. The Miscellaneous expense includes medical treatment fee.

3. There are 108 visitors with other purpose, and it contains many different purposes, the figures listed as reference.

Table 14 The average daily expenditures per visitor in 2018-according to main market

Unit: USD

| Main Market | | Total | Hotel Bills | Meals excluding hotel meals | Local transportation | Entertainment | Miscellaneous expenses | Shopping |
|-----------------------------|------------------|---------|-------------|-----------------------------|----------------------|---------------|------------------------|----------|
| All | Amount of money | 191.70 | 66.00 | 39.67 | 19.30 | 6.06 | 4.15 | 56.52 |
| | Percentage | 100.00% | 34.43% | 20.69% | 10.07% | 3.16% | 2.17% | 29.48% |
| | Amount of growth | 12.25 | -1.47 | 5.63 | 1.23 | 0.48 | 0.67 | 5.71 |
| | Growth rate | 6.83% | -2.18% | 16.54% | 6.81% | 8.60% | 19.25% | 11.24% |
| Japan | Amount of money | 219.35 | 104.21 | 41.63 | 19.24 | 9.39 | 5.75 | 39.13 |
| | Percentage | 100.00% | 47.51% | 18.98% | 8.77% | 4.28% | 2.62% | 17.84% |
| | Amount of growth | 5.30 | 2.36 | 3.95 | 0.55 | -0.69 | 0.68 | -1.55 |
| | Growth rate | 2.48% | 2.32% | 10.48% | 2.94% | -6.85% | 13.41% | -3.81% |
| Mainland China | Amount of money | 211.68 | 50.44 | 30.37 | 16.50 | 5.33 | 3.73 | 105.31 |
| | Percentage | 100.00% | 23.83% | 14.35% | 7.79% | 2.52% | 1.76% | 49.75% |
| | Amount of growth | 27.30 | 0.75 | 2.64 | 0.18 | 0.58 | 0.92 | 22.23 |
| | Growth rate | 14.81% | 1.51% | 9.52% | 1.10% | 12.21% | 32.74% | 26.76% |
| Korea | Amount of money | 187.71 | 73.03 | 45.42 | 18.23 | 6.30 | 5.06 | 39.67 |
| | Percentage | 100.00% | 38.91% | 24.20% | 9.71% | 3.35% | 2.70% | 21.13% |
| | Amount of growth | -6.87 | -4.07 | 4.23 | -0.21 | -0.75 | 0.55 | -6.62 |
| | Growth rate | -3.53% | -5.28% | 10.27% | -1.14% | -10.64% | 12.20% | -14.30% |
| Hong Kong /Macao | Amount of money | 202.31 | 61.94 | 49.55 | 20.90 | 5.38 | 3.89 | 60.65 |
| | Percentage | 100.00% | 30.62% | 24.49% | 10.33% | 2.66% | 1.92% | 29.98% |
| | Amount of growth | 18.39 | -1.99 | 8.00 | 1.26 | 0.68 | 1.09 | 9.35 |
| | Growth rate | 10.00% | -3.11% | 19.25% | 6.42% | 14.47% | 38.93% | 18.23% |
| New Southbound 18 Countries | Amount of money | 165.81 | 51.22 | 37.15 | 20.82 | 5.36 | 4.22 | 47.04 |
| | Percentage | 100.00% | 30.89% | 22.41% | 12.56% | 3.23% | 2.54% | 28.37% |
| | Amount of growth | 13.56 | -4.14 | 7.51 | 3.19 | 1.47 | 0.92 | 4.61 |
| | Growth rate | 8.91% | -7.48% | 25.34% | 18.09% | 37.79% | 27.88% | 10.86% |
| U.S.A | Amount of money | 159.42 | 62.00 | 40.33 | 18.76 | 5.41 | 12.04 | 20.88 |
| | Percentage | 100.00% | 38.89% | 25.30% | 11.77% | 3.39% | 7.55% | 13.10% |
| | Amount of growth | 3.75 | -13.53 | 4.82 | 0.92 | 1.64 | 6.77 | 3.13 |
| | Growth rate | 2.41% | -17.91% | 13.57% | 5.16% | 43.50% | 128.46% | 17.63% |
| Europe | Amount of money | 148.15 | 74.89 | 36.19 | 18.94 | 3.11 | 3.55 | 11.47 |
| | Percentage | 100.00% | 50.55% | 24.42% | 12.78% | 2.10% | 2.40% | 7.75% |
| | Amount of growth | 10.96 | -0.18 | 8.82 | -0.10 | 0.23 | 1.81 | 0.38 |
| | Growth rate | 7.99% | -0.24% | 32.23% | -0.53% | 7.99% | 104.02% | 3.43% |

Note: "New Southbound 18 countries" was classified from 2018, which include ASEAN 10 countries (Malaysia, Singapore, Indonesia, Philippines, Thailand, Vietnam, Myanmar, Brunei, Cambodia and Laos), South Asian 6 countries (India, Sri Lanka, Bhutan, Nepal, Bangladesh, and Pakistan), Australia and New Zealand.

B. The average amount of daily expenditure in Taiwan of each person of the inbound tour group visitors was US\$233.21, with annual increase 6.59%.

In 2018, the average amount of daily expenditure in Taiwan of each person of the inbound tour group visitors was US\$233.21, an increase of US\$14.42 (with annual increase of 6.59%); the details of the components of expenditure showed that, the amount of shopping increased most, representing US\$16.88 (with annual increase of 17.22%), but the amount of hotel bills decreased most, representing US\$2.41 (with annual decrease of 4.26%).

In 2018, in comparison of 4 main markets inbound tour group visitors show that the average daily expenditures in Taiwan of each person from Japan (US\$262.76) was higher than that of tour group visitors from Korea (US\$251.09), Mainland China (US\$229.67), and New Southbound 18 countries (US\$ 206.81). As for shopping, the average daily shopping expenditure of each person of the inbound tour group visitors, from highest to lowest were as follows: Mainland China tour group visitors (US\$149.16), New Southbound 18 countries tour group visitors (US\$78.98), Korea tour group visitors (US\$72.73), and Japan tour group visitors (US\$64.09).

Detailed shopping expenditure analysis showed that the inbound tour group visitors from Japan mainly purchased local special products (60.82%), tea (21.32%). The inbound tour group visitors from Mainland China mainly purchased jewelry or jade (32.12%), local special products (23.72%), and cosmetics or perfume (16.17%). The inbound tour group visitors from Korea mainly purchased local special products (48.74%), and souvenirs or handicraft products (22.69%). The inbound tour group visitors from New Southbound 18 countries mainly purchased local special products (34.39%), clothes or accessories (16.13%), and Chinese herbal medicine or health food (13.42%).

Compared with last year, the average daily expenditure of each person of the inbound tour group visitors from Japan was US\$262.76, an increase of US\$3.77 (with annual increase of 1.46%); the details of the components of expenditure showed that, except the amount of shopping decreased most, representing US\$9.99 (with annual decrease of 13.49%), while the amount of meals excluding hotel meals increased most, representing US\$6.33 (with annual increase of 14.17%), and then the amount of hotel bills increased US\$4.69 (with annual increase of 5.49%). The average daily expenditure of each person of the inbound tour group

visitors from Mainland China was US\$229.67, an increase of US\$40.92 (with annual increase of 21.68%); the details of the components of expenditure showed that, the amount of all components are increased, in which the amount of shopping increased most, representing US\$27.83 (with annual increase of 22.94%), then the amount of hotel bills increased US\$5.19 (with annual increase of 16.52%), and then the amount of meals excluding hotel meals increased US\$4.76 (with annual increase of 27.37%). The average daily expenditure of each person of the inbound tour group visitors from Korea was US\$251.09, an decrease of US\$6.87 (with annual decrease of 2.66%); the details of the components of expenditure showed that, the amount of shopping decreased most, representing US\$5.89 (with annual decrease of 7.49%), then the amount of hotel bills decreased US\$1.43 (with annual decrease of 1.64%). The average daily expenditure of each person of the inbound tour group visitors from New Southbound 18 countries was US\$206.81, an increase of US\$1.90 (with annual increase of 0.93%); the details of the components of expenditure showed that, the amount of shopping increased most, representing US\$1.87 (with annual increase of 2.43%), then the amount of meals excluding hotel meals increased US\$1.27 (with annual increase of 3.84%), while the amount of hotel bills decreased most, representing US\$0.93 (with annual decrease of 1.57%).

Table 15 The average daily expenditures of each person of the inbound tour group visitors in 2018 - according to main market

Unit: USD

| Main Market | | Total | Hotel Bills | Meals excluding hotel meals | Local transportation | Entertainment | Miscellaneous expenses | Shopping |
|---|------------------|---------|-------------|-----------------------------|----------------------|---------------|------------------------|----------|
| All tour group visitors | Amount of money | 233.21 | 54.10 | 31.40 | 16.59 | 8.08 | 8.16 | 114.88 |
| | Percentage | 100.00% | 23.20% | 13.46% | 7.11% | 3.47% | 3.50% | 49.26% |
| | Amount of growth | 14.42 | -2.41 | 1.39 | -0.59 | -0.63 | -0.22 | 16.88 |
| | Growth rate | 6.59% | -4.26% | 4.63% | -3.43% | -7.23% | -2.63% | 17.22% |
| Japan tour group visitors | Amount of money | 262.76 | 90.15 | 51.00 | 28.46 | 14.93 | 14.13 | 64.09 |
| | Percentage | 100.00% | 34.31% | 19.41% | 10.83% | 5.68% | 5.38% | 24.39% |
| | Amount of growth | 3.77 | 4.69 | 6.33 | 2.04 | -0.61 | 1.31 | -9.99 |
| | Growth rate | 1.46% | 5.49% | 14.17% | 7.72% | -3.93% | 10.22% | -13.49% |
| Mainland China tour group visitors | Amount of money | 229.67 | 36.61 | 22.15 | 11.12 | 5.29 | 5.34 | 149.16 |
| | Percentage | 100.00% | 15.94% | 9.64% | 4.84% | 2.30% | 2.33% | 64.95% |
| | Amount of growth | 40.92 | 5.19 | 4.76 | 1.63 | 0.78 | 0.73 | 27.83 |
| | Growth rate | 21.68% | 16.52% | 27.37% | 17.18% | 17.29% | 15.84% | 22.94% |
| Korea tour group visitors | Amount of money | 251.09 | 85.67 | 40.88 | 24.61 | 12.47 | 14.73 | 72.73 |
| | Percentage | 100.00% | 34.12% | 16.28% | 9.80% | 4.96% | 5.87% | 28.97% |
| | Amount of growth | -6.87 | -1.43 | 0.09 | -0.89 | -0.54 | 1.79 | -5.89 |
| | Growth rate | -2.66% | -1.64% | 0.22% | -3.49% | -4.15% | 13.83% | -7.49% |
| New Southbound 18 Countries tour group visitors | Amount of money | 206.81 | 58.40 | 34.38 | 18.01 | 8.49 | 8.55 | 78.98 |
| | Percentage | 100.00% | 28.24% | 16.62% | 8.71% | 4.11% | 4.13% | 38.19% |
| | Amount of growth | 1.90 | -0.93 | 1.27 | -0.01 | -0.15 | -0.15 | 1.87 |
| | Growth rate | 0.93% | -1.57% | 3.84% | -0.06% | -1.74% | -1.72% | 2.43% |

Note: The tour group visitors mean the inbound visitors who chose to make their trip as a " group tour arranged through a travel agency (joined a tour group)."

Table 16 The average daily expenditures of shopping details of each person of the inbound tour group visitors in 2018 - according to main market

Unit: USD

| Shopping Details | All tour group visitors | | Japan tour group visitors | | Mainland China tour group visitors | |
|--|-------------------------|---------------|---------------------------|---------------|------------------------------------|---------------|
| | Amount of money | Percentage | Amount of money | Percentage | Amount of money | Percentage |
| Total | 114.88 | 100.00% | 64.09 | 100.00% | 149.16 | 100.00% |
| Clothes or accessories | 9.06 | 7.89% | 1.75 | 2.73% | 11.44 | 7.67% |
| Jewelry or jade | 28.72 | 25.00% | 3.33 | 5.20% | 47.91 | 32.12% |
| Souvenirs or handicraft products | 6.38 | 5.55% | 3.42 | 5.34% | 5.37 | 3.60% |
| Cosmetics or perfumes | 15.61 | 13.59% | 1.61 | 2.51% | 24.12 | 16.17% |
| Local special products | 36.23 | 31.54% | 38.98 | 60.82% | 35.38 | 23.72% |
| Tobacco or alcohol | 4.14 | 3.60% | 0.93 | 1.45% | 6.21 | 4.16% |
| Chinese herbal medicine or health food | 4.01 | 3.49% | 0.24 | 0.38% | 4.33 | 2.90% |
| 3C or electronic appliances | 0.67 | 0.58% | 0.08 | 0.13% | 1.01 | 0.68% |
| Tea | 7.98 | 6.95% | 13.67 | 21.32% | 7.84 | 5.26% |
| Others | 2.08 | 1.81% | 0.08 | 0.12% | 5.55 | 3.72% |

Table 16 The average daily expenditures of shopping details of each person of the inbound tour group visitors in 2018 - according to main market (continued.)

Unit: USD

| Shopping Details | All tour group visitors | | Korea tour group visitors | | New Southbound 18 Countries tour group visitors | |
|--|-------------------------|---------------|---------------------------|---------------|---|---------------|
| | Amount of money | Percentage | Amount of money | Percentage | Amount of money | Percentage |
| Total | 114.88 | 100.00% | 72.73 | 100.00% | 78.98 | 100.00% |
| Clothes or accessories | 9.06 | 7.89% | 1.60 | 2.20% | 12.74 | 16.13% |
| Jewelry or jade | 28.72 | 25.00% | 3.81 | 5.24% | 7.87 | 9.96% |
| Souvenirs or handicraft products | 6.38 | 5.55% | 16.50 | 22.69% | 7.23 | 9.16% |
| Cosmetics or perfumes | 15.61 | 13.59% | 4.79 | 6.59% | 7.82 | 9.90% |
| Local special products | 36.23 | 31.54% | 35.45 | 48.74% | 27.16 | 34.39% |
| Tobacco or alcohol | 4.14 | 3.60% | 4.18 | 5.74% | 0.15 | 0.19% |
| Chinese herbal medicine or health food | 4.01 | 3.49% | 0.92 | 1.26% | 10.60 | 13.42% |
| 3C or electronic appliances | 0.67 | 0.58% | 0.23 | 0.31% | 0.25 | 0.32% |
| Tea | 7.98 | 6.95% | 3.61 | 4.97% | 4.56 | 5.77% |
| Others | 2.08 | 1.81% | 1.64 | 2.26% | 0.60 | 0.76% |

C. The average amount of daily expenditure in Taiwan of each person of the inbound non-tour-group visitors was US\$181.49, with annual increase of 6.51%.

In 2018, the average amount of daily expenditure in Taiwan of each person of the inbound non-tour-group visitors was US\$181.49, an increase of US\$11.10 (with annual increase of 6.51%); the details of the components of expenditure showed that, except the amount of hotel bills decreased US\$1.61 (with annual decrease of 2.30%), the amount of all other components are increased, in which the amount of meals excluding hotel meals increased most, representing US\$6.51 (with annual increase of 18.69%), then the amount of shopping increased US\$2.63 (with annual increase of 6.60%), and then the amount of local transportation increased US\$1.67 (with annual increase of 9.19%).

In 2018, in comparison of 4 main markets inbound non-tour-group visitors show that the average daily expenditures in Taiwan of each person from Japan (US\$207.75) was higher than that of non-tour-group visitors from Mainland China (US\$196.11), Korean (US\$174.21), and New Southbound 18 countries (US\$160.13). As for shopping, the average daily shopping expenditure of each person of the inbound non-tour-group visitors, from highest to lowest were as follows: Mainland China non-tour-group visitors (US\$65.55), New Southbound 18 countries non-tour-group visitors (US\$42.39), Korea non-tour-group visitors (US\$33.31), and Japan non-tour-group visitors (US\$32.55).

Detailed shopping expenditure analysis showed that the inbound non-tour-group visitors from Japan mainly purchased local special products (60.27%), tea (15.26%), clothes or accessories (10.22%). The inbound non-tour-group visitors from Mainland China mainly purchased local special products (29.15%), cosmetics and perfumes (28.00%), and clothes or accessories (18.02%). The inbound non-tour-group visitors from Korea mainly purchased local special products (61.70%), and souvenirs or handicraft products (18.06%). The inbound non-tour-group visitors from New Southbound 18 countries mainly purchased local special products (35.87%), clothes or accessories (25.79%), and cosmetics and perfumes (11.51%).

Compared with last year, the average daily expenditure of each person of the inbound non-tour-group visitors from Japan was US\$207.75, an increase of US\$10.92 (with annual increase of 5.55%); the details of the components of expenditure showed that, except the amount of hotel bills decreased US\$0.17 (with

annual decrease of 0.16%), the amount of all other components are increased, in which the amount of meals excluding hotel meals increased most, representing US\$4.29 (with annual increase of 12.36%), and then the amount of shopping increased US\$4.14 (with annual increase of 14.57%). The average daily expenditure of each person of the inbound non-tour-group visitors from Mainland China was US\$196.11, an increase of US\$13.21 (with annual increase of 7.22%); the details of the components of expenditure showed that, the amount of all components are increased, in which the amount of meals excluding hotel meals increased most, representing US\$4.64 (with annual increase of 14.11%), then the amount of hotel bills increased US\$3.53 (with annual increase of 5.94%), and then the amount of shopping increased US\$2.96 (with annual increase of 4.73%). The average daily expenditure of each person of the inbound non-tour-group visitors from Korea was US\$174.21, an increase of US\$2.08 (with annual increase of 1.21%); the details of the components of expenditure showed that, the amount of meals excluding hotel meals increased most, representing US\$4.76 (with annual increase of 11.50%), but the amount of hotel bills decreased most, representing US\$3.10 (with annual decrease of 4.24%). The average daily expenditure of each person of the inbound non-tour-group visitors from New Southbound 18 countries was US\$160.13, an increase of US\$14.25 (with annual increase of 9.77%); the details of the components of expenditure showed that, except the amount of hotel bills decreased US\$4.82 (with annual decrease of 8.33%), the amount of all other components are increased, in which the amount of meals excluding hotel meals increased most, representing US\$8.22 (with annual increase of 28.29%), and then the amount of shopping increased US\$4.07 (with annual increase of 10.62%).

Table 17 The average daily expenditures of each person of the inbound non-tour -group visitors in 2018 - according to main market

Unit: USD

| Main Market | | Total | Hotel Bills | Meals excluding hotel meals | Local transportation | Entertainment | Miscellaneous expenses | Shopping |
|---|------------------|---------|-------------|-----------------------------|----------------------|---------------|------------------------|----------|
| All non-tour-group visitors | Amount of money | 181.49 | 68.47 | 41.34 | 19.85 | 5.69 | 3.69 | 42.45 |
| | Percentage | 100.00% | 37.73% | 22.78% | 10.94% | 3.13% | 2.03% | 23.39% |
| | Amount of growth | 11.10 | -1.61 | 6.51 | 1.67 | 0.80 | 1.10 | 2.63 |
| | Growth rate | 6.51% | -2.30% | 18.69% | 9.19% | 16.36% | 42.47% | 6.60% |
| Japan non-tour-group visitors | Amount of money | 207.75 | 107.83 | 38.99 | 16.76 | 8.06 | 3.56 | 32.55 |
| | Percentage | 100.00% | 51.90% | 18.77% | 8.07% | 3.88% | 1.71% | 15.67% |
| | Amount of growth | 10.92 | -0.17 | 4.29 | 1.19 | 0.09 | 1.38 | 4.14 |
| | Growth rate | 5.55% | -0.16% | 12.36% | 7.64% | 1.13% | 63.30% | 14.57% |
| Mainland China non-tour-group visitors | Amount of money | 196.11 | 62.97 | 37.52 | 21.33 | 5.88 | 2.86 | 65.55 |
| | Percentage | 100.00% | 32.11% | 19.13% | 10.87% | 3.00% | 1.46% | 33.43% |
| | Amount of growth | 13.21 | 3.53 | 4.64 | 1.45 | 0.48 | 0.15 | 2.96 |
| | Growth rate | 7.22% | 5.94% | 14.11% | 7.29% | 8.89% | 5.54% | 4.73% |
| Korea non-tour-group visitors | Amount of money | 174.21 | 69.93 | 46.16 | 16.76 | 5.07 | 2.98 | 33.31 |
| | Percentage | 100.00% | 40.14% | 26.50% | 9.62% | 2.91% | 1.71% | 19.12% |
| | Amount of growth | 2.08 | -3.10 | 4.76 | 0.93 | 0.01 | 1.47 | -1.99 |
| | Growth rate | 1.21% | -4.24% | 11.50% | 5.87% | 0.20% | 97.35% | -5.64% |
| New Southbound 18 Countries non-tour-group visitors | Amount of money | 160.13 | 49.78 | 37.28 | 21.13 | 4.98 | 4.57 | 42.39 |
| | Percentage | 100.00% | 31.09% | 23.28% | 13.20% | 3.11% | 2.85% | 26.47% |
| | Amount of growth | 14.25 | -4.82 | 8.22 | 3.65 | 1.68 | 1.45 | 4.07 |
| | Growth rate | 9.77% | -8.83% | 28.29% | 20.88% | 50.91% | 46.47% | 10.62% |

Note: The non-group visitors mean all the inbound visitors except the group visitors.

Table 18 The average daily expenditures of shopping details of each person of the inbound non-tour-group visitors in 2018 - according to main market

Unit: USD

| Shopping Details | All non-tour-group visitors | | Japan non-tour-group visitors | | Mainland China non-tour-group visitors | |
|--|-----------------------------|---------------|-------------------------------|---------------|--|---------------|
| | Amount of money | Percentage | Amount of money | Percentage | Amount of money | Percentage |
| Total | 42.45 | 100.00% | 32.55 | 100.00% | 65.55 | 100.00% |
| Clothes or accessories | 7.96 | 18.75% | 3.32 | 10.22% | 11.81 | 18.02% |
| Jewelry or jade | 1.13 | 2.65% | 0.40 | 1.23% | 5.27 | 8.04% |
| Souvenirs or handicraft products | 2.97 | 7.00% | 1.25 | 3.83% | 3.64 | 5.55% |
| Cosmetics or perfumes | 6.10 | 14.38% | 1.38 | 4.23% | 18.35 | 28.00% |
| Local special products | 18.11 | 42.66% | 19.61 | 60.27% | 19.11 | 29.15% |
| Tobacco or alcohol | 0.66 | 1.56% | 0.48 | 1.48% | 1.20 | 1.83% |
| Chinese herbal medicine or health food | 0.58 | 1.37% | 0.19 | 0.57% | 1.18 | 1.80% |
| 3C or electronic appliances | 0.59 | 1.39% | 0.13 | 0.39% | 0.70 | 1.07% |
| Tea | 2.28 | 5.37% | 4.97 | 15.26% | 2.64 | 4.02% |
| Others | 2.07 | 4.87% | 0.82 | 2.52% | 1.65 | 2.52% |

Table 18 The average daily expenditures of shopping details of each person of the inbound group visitors in 2018 - according to main market (continued.)

Unit: USD

| Shopping Details | All non-tour-group visitors | | Korea non-tour-group visitors | | New Southbound 18 Countries non-tour-group visitors | |
|--|-----------------------------|---------------|-------------------------------|---------------|---|---------------|
| | Amount of money | Percentage | Amount of money | Percentage | Amount of money | Percentage |
| Total | 42.45 | 100.00% | 33.31 | 100.00% | 42.39 | 100.00% |
| Clothes or accessories | 7.96 | 18.75% | 2.20 | 6.61% | 10.93 | 25.79% |
| Jewelry or jade | 1.13 | 2.65% | 0.04 | 0.11% | 1.38 | 3.25% |
| Souvenirs or handicraft products | 2.97 | 7.00% | 6.02 | 18.06% | 3.24 | 7.65% |
| Cosmetics or perfumes | 6.10 | 14.38% | 1.15 | 3.44% | 4.88 | 11.51% |
| Local special products | 18.11 | 42.66% | 20.55 | 61.70% | 15.21 | 35.87% |
| Tobacco or alcohol | 0.66 | 1.56% | 1.33 | 4.00% | 0.33 | 0.77% |
| Chinese herbal medicine or health food | 0.58 | 1.37% | 0.08 | 0.25% | 0.62 | 1.47% |
| 3C or electronic appliances | 0.59 | 1.39% | 0.00 | 0.00% | 0.86 | 2.02% |
| Tea | 2.28 | 5.37% | 1.53 | 4.60% | 1.61 | 3.81% |
| Others | 2.07 | 4.87% | 0.41 | 1.23% | 3.33 | 7.86% |

D. A total of 24.28% of the inbound visitors had used the tax refund service. A total of 95% of the inbound visitors who had used the tax refund service thought the procedures to get a tax refund were convenient.

A total of 24.28% of the inbound visitors had used the tax refund service. A total of 95.10% of the inbound visitors who had used the tax refund service thought the procedures were convenient.

More than 29.36% of the inbound visitors with sightseeing as their purpose applied for tax refunds. A total of 95.38% of the inbound visitors with sightseeing purpose thought tax refund services were convenient.

Table 19 The tax refund conditions for the inbound visitors in 2018
– according to their main purpose

| Main Purpose | Unit: % | |
|--|------------------------|--|
| | Applied for tax refund | Thought the procedures were convenient |
| All Purposes | 24.28 | 95.10 |
| Sightseeing | 29.36 | 95.38 |
| Business | 9.51 | 90.54 |
| International conference or exhibition | 14.10 | 100.00 |
| Visiting friends or relatives | 10.81 | 93.33 |
| Studies | 22.22 | 100.00 |
| Medical treatment | 21.43 | 100.00 |
| Others | 13.89 | 93.33 |

Note: The sample sizes of two purposes - "studies" (only 27 persons) and "medical treatment" (only 28 persons) are less than 30, the figures listed as reference.

V. Analysis of the Inbound Visitors' Satisfaction

A. A total of 97% of the inbound visitors were satisfied with their overall experience in Taiwan.

The inbound visitors tended to be satisfied with the items of “tourism convenience”, “environment internationalization” and “environmental safety”. As for those items involved with the previous three categories, “friendliness of Taiwan people”, “safety of social environments”, “safety of accommodation facilities”, and “convenience of international transportation to Taiwan (Ease of obtaining tickets, flight times, etc.)” earned the highest satisfaction score.

According to the analysis of different markets, inbound visitors have high overall satisfaction during their trip to Taiwan in 2018.

Table 20 The overall satisfaction of the inbound visitors during this trip to Taiwan in 2018

| | Item | Mean | Standard Deviation |
|-------------------------------------|---|------|--------------------|
| Convenience | International transportation to Taiwan (Ease of obtaining tickets, flight times, etc.) | 4.54 | 0.59 |
| | Local transportation | 4.49 | 0.62 |
| | Access to tourist information | 4.47 | 0.65 |
| | Efficiency of applying for a visa | 4.40 | 0.80 |
| | Communication facilities (Int'l public telephone, Internet) | 4.36 | 0.74 |
| | Customs procedures | 4.29 | 0.82 |
| | Immigration procedures | 4.20 | 0.90 |
| | iTaiwan Free Wi-Fi | 3.93 | 1.05 |
| Environment Internationalization | Friendliness of Taiwan people | 4.63 | 0.56 |
| | Clearness of road signs and public facilities signs | 4.34 | 0.75 |
| | Access to services in language | 4.31 | 0.82 |
| Safety | Safety of social environments | 4.59 | 0.55 |
| | Safety of accommodation facilities | 4.58 | 0.55 |
| | Safety of recreational facilities | 4.51 | 0.57 |
| | Good public environmental hygiene | 4.35 | 0.76 |
| | Good food hygiene | 4.32 | 0.76 |
| Total | Overall satisfaction | 4.49 | 0.55 |

Note: Likert 5 point scale: 1=very poor, 2=poor, 3=fair, 4=good, 5=excellent.

B. A total of 99% of the inbound visitors were willing to revisit Taiwan, the likely purpose of their next trip would be sightseeing. A total of 99% of the inbound visitors will recommend relatives and friends to visit Taiwan.

A total of 99% of the inbound visitors said they were willing to come back to Taiwan. The purpose of their next trip would be sightseeing (76.69%), visit relatives/friends (11.90%), and business (9.69 %). A total of 99% of the inbound visitors will recommend relatives and friends to visit Taiwan.

Table 21 The main purpose for the inbound visitors to revisit Taiwan in 2018

| | | | | | | | Unit: % |
|------------------------------------|--------|-------------|--------------------------|----------|--------------------------------------|---------|-------------------|
| The main purpose to revisit Taiwan | Total | Sightseeing | Visit relatives/ friends | Business | International conference/ exhibition | Studies | Medical Treatment |
| Percentage | 100.00 | 76.69 | 11.90 | 9.69 | 0.50 | 0.34 | 0.21 |

Table 22 The willingness of the inbound visitors to recommend friends or relatives to visit Taiwan in 2018

| | | | Unit: % |
|---|--------|-------|---------|
| Will you recommend friends or relatives to visit Taiwan | Total | Yes | No |
| Percentage | 100.00 | 99.46 | 0.54 |

C. The “friendliness of people”, “gourmet food or delicious snacks” and “scenery” were the most competitive advantages of Taiwan.

Besides Taiwan, the favorite Asian countries/area that the inbound visitors had ever been to (with sightseeing purpose) for the past three years were Japan, Thailand, and Korea.

Compared with other Asian countries/area, Taiwan was concluded by the inbound visitors that friendliness of people (37 persons per hundred), gourmet food or delicious snacks (32 persons per hundred) and scenery (18 persons per hundred) were its superior items.

Table 23 The favorite Asian countries/area the inbound visitors had ever been to in 2018 (except Taiwan)

Unit: %

| Ranking | Country/area | Percentage favoring the country/area | Ranking | Country/area | Percentage favoring the country/area |
|---------|-----------------|--------------------------------------|---------|----------------|--------------------------------------|
| 1 | Japan | 43.22 | 6 | Mainland China | 4.59 |
| 2 | Thailand | 17.45 | 7 | Malaysia | 3.26 |
| 3 | Korea | 9.24 | 8 | Philippine | 2.45 |
| 4 | Singapore | 9.21 | 9 | Indonesia | 2.12 |
| 5 | Hong Kong/Macao | 8.46 | | | |

Table 24 Ranking of Taiwan’s superior characteristics as thought of by the inbound visitors in 2018 (compared with their favorite Asian countries/area)

Unit: persons per hundred

| Ranking | Item | Relative persons | Ranking | Item | Relative persons |
|---------|----------------------------------|------------------|---------|--------------------------|------------------|
| 1 | Friendliness of people | 37.06 | 9 | Geographical convenience | 2.98 |
| 2 | Gourmet food or delicious snacks | 31.53 | 10 | Weather | 2.47 |
| 3 | Scenery | 18.33 | 11 | Night life | 1.97 |
| 4 | Fruits | 9.06 | 12 | Democracy | 0.71 |
| 5 | Safety of social environment | 6.49 | 13 | Recreational facilities | 0.48 |
| 6 | Customs and culture | 6.44 | 14 | Festival activities | 0.43 |
| 7 | Shopping | 5.30 | 15 | Health care | 0.40 |
| 8 | Historical relics | 3.13 | 16 | Flowers | 0.25 |

Note: Visitors interviewed were allowed to choose more than one item in this question.

Table 25 The comparison between Taiwan and the inbound visitor's favorite Asian country/area in 2018

| Favorite Country/Area | Reason | Superior item in Taiwan |
|-----------------------|---|---|
| Japan | Shopping, Gourmet food or delicious snacks, Scenery | Friendliness of people |
| Thailand | Scenery, Gourmet food or delicious snacks | Friendliness of people |
| Korea | Shopping, Gourmet food or delicious snacks, Scenery | Friendliness of people, Gourmet food or delicious snacks |
| Singapore | Scenery | Friendliness of people, Gourmet food or delicious snacks |
| Hong Kong/Macao | Shopping, Gourmet food or delicious snacks | Friendliness of people, Scenery, Gourmet food or delicious snacks |
| Mainland China | Scenery | Friendliness of people, Gourmet food or delicious snacks |
| Malaysia | Gourmet food or delicious snacks, Scenery | Gourmet food or delicious snacks, Friendliness of people |
| Philippine | Scenery | Gourmet food or delicious snacks, Friendliness of people |
| Indonesia | Scenery | Gourmet food or delicious snacks, Friendliness of people |

D. Taiwan’s “gourmet food”, “scenery”, “local friendliness and hospitality”, and “night markets sightseeing” were the most impressive parts of Taiwan for inbound visitors.

The most impressive parts of Taiwan according to inbound visitors were Taiwan’s gourmet food (55 persons per hundred), scenery (50 persons per hundred), local friendliness and hospitality (42 persons per hundred), and night markets sightseeing (35 persons per hundred).

Table 26 Ranking of the deepest impression of Taiwan as thought of by inbound visitors in 2018

| Unit: persons per hundred | | | | | |
|---------------------------|------------------------------------|------------------|---------|---------------------------------|------------------|
| Ranking | Item | Relative persons | Ranking | Item | Relative persons |
| 1 | Gourmet food | 55.31 | 10 | Famous local products | 7.64 |
| 2 | Tourist spots | 50.31 | 11 | Hot springs | 6.77 |
| 3 | Local friendliness and hospitality | 41.81 | 12 | Night life | 4.58 |
| 4 | Night markets sightseeing | 35.14 | 13 | 24 hour book stores | 2.67 |
| 5 | Coastal view | 25.65 | 14 | Aboriginal culture | 2.49 |
| 6 | Fruits | 14.31 | 15 | Cosmetic and medical treatments | 1.99 |
| 7 | Historical relics | 11.53 | 16 | The accommodation experience | 1.99 |
| 8 | Convenience stores | 9.40 | 17 | Cycling fun | 1.58 |
| 9 | Temple | 8.35 | 18 | Festival activities | 0.55 |

Note: Visitors interviewed were allowed to choose more than one item in this question

E. The choice of accommodation for the inbound visitors in Taiwan was “General hotels”. Their overall satisfaction of their accommodation is 87%, trending towards “Good” and “Excellent”.

The main accommodation for the inbound visitors was a hotel (79 persons per hundred). The choice of accommodation for the inbound visitors in Taiwan was “General hotels” (76.04%), “International tourist hotels” (17.78%) and “General tourist hotel” (6.18 %). The rating of the hotel tends to be “Good and Excellent” (87.37%) and “dissatisfied” (1.39%). The rating of the guest houses (or B&B) tends to be “Good and Excellent” (91.81%) and “dissatisfied” (2.16%).

F. For group tours arranged through a travel agency, the number of shopping trips arranged by local travel agencies was mostly 3-4 times per tour. 67% of their comments on commodity prices were “good price”.

Of the total of 39.27% of the inbound tour group visitors who chose to make their trip as a “group tour arranged through a travel agency”, the number of shopping trips arranged by their local travel agency was 3-4 times per tour, while 24.23% were 5-6 times per tour. And 66.84% of their comments on commodity prices were “good price”, while 20.26% were "high price".

G. A total of 96% of the inbound tour group visitors were satisfied with their overall impressions of the travel agencies and the services of the tour guides.

The inbound tour group visitors trend toward satisfied with travel agencies and the services of the tour guides, whose ranking of satisfaction from high to low was: “The tour guide’s ability to handle emergencies“, “Professionalism of the tour guides”, “Transportation (including driver services)”, “The tour guides’ integral service performances”, “Accommodation”, “Itinerary”, and “Meals.”

H. Over 87% of the inbound visitors were satisfied with the means of local transportation in Taiwan

The inbound visitors trend toward satisfied with the means of local transportation in Taiwan (all above 87%, except the airplane with sample size only 23 visitors), the highest rankings of satisfaction are High Speed Rail (97.95%) , Car rental (97.89%) , MRT (97.66%), Ship (96.03%), Coach (95.95%) and Public bicycles (95.92%).

VI. Analysis of Basic Information of the Inbound Visitors

A. The occupation of the inbound visitors was mainly professionals.

The main occupation of the inbound visitors was professionals (32.71%), legislators, senior officials and managers (15.28%), and clerical support workers (12.00%).

B. The education level of most inbound visitors was college or university level and their annual income was mainly “No fixed income”, “between US\$15,000 and US\$29,999”, and “between US\$30,000~US\$39,999.”

The highest category of education on the survey of the inbound visitors was “College or university.” Most inbound visitors (65.40%) were in this category. The average annual income of the inbound visitors was US\$ 33,207.65. Those inbound visitors with “no fixed income”, annual income “between US\$15,000 and US\$29,999”, and “between US\$30,000 and US\$39,999” were the three major categories which made up 31.76%, 15.74% and 12.32% of those inbound visitors, respectively.

VII. Analysis Findings

- A. Because Taiwan's New Southbound Policy got some achievements, the successful policy made the tourism source countries more diversified. The proportion of Mainland China's visitors to Taiwan decreased year by year in the past 4 years, but the number of the tourists from the 18 countries of the New Southbound Policy was growing greatly year by year. In 2018, the number of visitors to Taiwan hit a new record high of 11.07 million person-times. Among them, the highest growth rate of visitors resulted from the increasing tourists from the 18 countries of New Southbound Policy. The total expenditure of visitors to Taiwan in 2018 reached \$13.7 billion, increasing by 11.29% from the previous year, the third highest amount in history. Japanese visitors had the highest average daily consumption per capita, while the visitors from Mainland China purchased most in 2018.**
- B. The Internet penetration rate was still the highest in 2018. The inbound visitors decision-making to visit Taiwan was influenced by the word-of-mouth recommendations from friends or relatives and the internet had the highest influence on visitors' decision-making.. The overall satisfaction level for all of the inbound visitors was higher than 95% in 2018.**
- C. Taking public transportation continued popularization for the inbound visitors; riding the MRT became the first choice. The visitors satisfaction level reached 87% responded by the visitors taking public transportation in 2018. Also, the inbound visitors were impressed by Taiwan's gourmets, scenic spots, local friendliness and hospitality, night markets sightseeing and coastal view.**
- D. The number of female inbound visitors continues to exceed that of male inbound visitors in 2018, with the ratio of female inbound visitors from China was the highest. However, the average daily consumption per capita of male inbound visitors was still higher than that of female male inbound visitors, while the female inbound visitors preferred to go shopping (especially in cosmetics or perfumes), eat fruits, visit night markets and Ximending. Regarding the rate of browsing advertisements or tourism reports of the inbound visitors before travelling to Taiwan, female inbound visitors had a higher rate than male inbound visitors. There are also more first-time female inbound visitors than male inbound visitors**

in the past three years.

- E. The older the inbound visitors were, under the age of 60, the higher their average daily consumption per capita was. The inbound visitors over 40 years old and of annual income more than USD40,000 belonged to the higher consumption group.
- F. The inbound non-tour-group visitors preferred to visit Ximending, Longshan Temple, Tamsui, Beitou, Yangmingshan National Park, Yongkang Street Commercial District and Xiangshan. The inbound tour group visitors preferred shopping, but non-tour-group visitors spent more money on hotel bills, meals excluding hotel meals, and local transportation.
- G. In 2018, the average daily consumption per capita of Japanese inbound visitors was higher than that of last year and remained the highest of all main markets. They paid attention to "safe social environment", loved "gourmet food or delicious snacks" and "fruits". They also preferred to buy "local special products" and "tea".
- H. The inbound non-tour-group visitors from China preferred to go shopping; the expenditure on jewelry or jade increased most, and remained the highest percentage in 2018. Regarding the non-tour-group visitors, they spent more money on hotel bills (only slightly lower than the expenses on shopping), and their expenditure on meals excluding hotel meals increased most. The non-tour-group visitors were more attracted and impressed by the gourmet foods, before or after arriving in Taiwan, than that of the tour group visitors.
- I. As a result of slower economic growth rate in Korea, the number of visitors to Taiwan and the amount of average daily consumption per capita in Taiwan were a little lower in 2018 than it was in 2017. Among them, the shopping expenses decreased most, followed by the expenses in the hotel bills; while expenditure on meals excluding hotel meals increased most.
- J. As a result of adopting visa-exempt entry policies and effective tourism marketing strategy by the government of Taiwan to the New Southbound 18 countries involved in New Southbound Policy, the number of inbound visitors from these countries to Taiwan has grown substantially and reached an all-time high. The daily consumption per capita of the New Southbound 18 countries inbound

visitors was higher than that of US and European inbound visitors. Among them, the shopping expenses of the New Southbound 18 countries inbound visitors exceeded those of Korea and Japanese inbound visitors. The expenditure on hotel bills, meals excluding hotel meals, the local transportation costs, and the entertainment spent in Taiwan by the inbound visitors of the New Southbound 18 countries was more than that of inbound visitors from Mainland China.