

2014 Annual Survey Report on Visitors Expenditure and Trends in Taiwan

Summary

The Tourism Bureau, MOTC expects to understand the motives, viewpoints, tendencies and consumption of the inbound visitors in Taiwan in 2014 to supply reference material to tourist 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 the amount of visitor expenditures. Here at the Tourism Bureau, MOTC, we proceeded with the survey at the Taiwan Taoyuan International Airport, Kaohsiung International Airport, Taipei Songshan Airport, and Taichung Airport, interviewing inbound visitors, as they were about to leave Taiwan.

The objects of this survey were the foreign and overseas Chinese inbound visitors from January 1 to December 31, 2014 (excluding the foreign and overseas Chinese transit visitors). This survey still 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 6,033 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” and “Analysis of Basic Information of the Inbound Visitors”.

I. Related Indices of the Inbound Visitors in Taiwan

9,910,204 persons	Number of inbound visitors; the annual rate of growth was 23.63%
US\$14,615 million	Total annual amount in visitor expenditures in tourism; the annual rate of growth was 18.61%
US\$1,475	Per capita inbound visitor spending; a decrease of 4.03% from the previous year.
6.65 nights	Average length of stay (nights) for all inbound visitors; the amount of decrease from the previous year was 0.21 nights
US\$221.76	Average daily expenditures per visitor; a decrease of 1.03% from the previous year.
7,192,095 persons	Number of inbound visitors with sightseeing purpose; the annual rate of growth was 31.26%
US\$228.95	Average daily expenditures per visitor with sightseeing purpose; a decrease of 2.89% from the previous year.
769,665 persons	Number of inbound visitors with business purpose; a decrease of 17.00% from the previous year.
US\$260.16	Average daily expenditures per visitor with business purpose; an increase of 3.23% from the previous year.
96%	Overall satisfaction of inbound visitors as a percentage of the total; an increase of 1% from the previous year.
34%	Percentage of inbound visitors that had revisited Taiwan in the past three years; a decrease of 1% from the previous year.

Table 1 Related Indices of the Inbound Visitors in Taiwan from 2012 to 2014

Index \ Year	2014	2013	2012
Number of inbound visitors	9,910,204 persons	8,016,280 persons	7,311,470 persons
Total annual amount in visitor expenditures in tourism	US\$14,615 million	US\$12,322 million	US\$11,769 million
Per capita inbound visitor spending	US\$1,475	US\$1,537	US\$1,610
Average length of stay for all inbound visitors	6.65 nights	6.86 nights	6.87 nights
Average daily expenditures per visitor	US\$221.76	US\$224.07	US\$234.31
Number of inbound visitors with sightseeing purpose	7,192,095 persons	5,479,099 persons	4,677,330 persons
Average daily expenditures per visitor with sightseeing purpose	US\$228.95	US\$235.76	US\$256.87
Number of inbound visitors with business purpose	769,665 persons	927,262 persons	893,767 persons
Average daily expenditures per visitor with business purpose	US\$260.16	US\$252.02	US\$217.48
Overall satisfaction of inbound visitors as a percentage of the total	96%	95%	95%
Percentage of inbound visitors that had revisited Taiwan	34%	35%	31%

II. Analysis of the Inbound Visitors' Plans

A. 59% 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 the internet, word-of-mouth recommendations from friends or relatives, TV/radio, newspapers/magazines, and tourism leaflets of travel agencies.

The percentage of the inbound visitors who had seen the advertisements or read reports about Taiwan before coming here was 59.06%. The source of the advertisements and reports mentioned above were mostly the internet (63 persons per hundred), TV/radio (47 persons per hundred) and word-of-mouth recommendations from friends or relatives (36 persons per hundred).

The higher percentages of inbound visitors who had seen the advertisements or read reports include the inbound visitors with sightseeing purpose (66.02%), as well as the inbound visitors coming from Japan (70.10%), Hong Kong/Macao (68.97%), Malaysia (65.53%), Singapore (61.40%), Mainland China (61.34%), and Korea(58.43%).

The visitors indicated that their vacation travel planning was often done through the internet, word-of-mouth recommendations from friends or relatives, TV/radio, newspapers/magazines and tourism leaflets of travel agencies (with the mean larger than 3.70).

Of the inbound visitors who had seen the advertisements or read reports from the internet, their reference websites were public web portals (73 persons per hundred), social networking service (36 persons per hundred), official websites of tourism-related organizations (28 persons per hundred), and forums of blogs or bbs (22 persons per hundred).

Table 2 Percentage of the inbound visitors who had read seen the advertisements or read reports about Taiwan before coming here in 2014

Year	All purposes	Sightseeing	Business	Unit: %
				Int'l conference/ exhibition
2014	59.06	66.02	31.95	49.26

Table 3 How much the inbound visitors were influenced by the media in making their decision to visit Taiwan in 2014

Item	News-papers magazines		Advertisement on subways/buses		TV/radio		Internet		International travel Exhibitions		Outdoor advertisements or billboards		Tourism leaflets of travel agencies		Word-of-mouth recommendations from friends or relatives	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD
All purposes	3.91	1.20	3.17	1.35	4.09	1.21	3.28	1.22	2.95	1.24	3.71	1.28	4.22	1.02	4.30	1.04
Sightseeing	3.99	1.13	3.19	1.32	4.18	1.14	3.30	1.21	2.96	1.23	3.79	1.25	4.25	0.97	4.38	0.95
Business	3.51	1.39	3.67	1.37	3.81	1.45	3.25	1.24	3.20	1.32	3.03	1.48	3.76	1.41	3.91	1.35
International conference/exhibition	2.96	1.54	2.40	1.55	2.92	1.41	3.50	1.41	2.47	1.25	3.06	1.00	3.35	1.32	3.86	1.31

Note: 1. SD means standard deviation

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

B. “Airport arrival hall” “ Internet” and “hotel” were cited as the inbound visitors’ preferred locations to obtain travel information, among which “transportation information”, “scenic spots introduction”, and “restaurant information” were viewed as the most desired three.

The places that the inbound visitors plan to get traveling information after arriving in Taiwan were mainly airport arrival hall (51 persons per hundred), internet (38 persons per hundred), and hotel (28 persons per hundred).

The information that the inbound visitors hope to get after arriving in Taiwan were mainly transportation information (54 persons per hundred), scenic spots introduction (50 persons per hundred), restaurant information (50 persons per hundred) and travel or road maps (34 persons per hundred) .

Table 4 Places where the inbound visitors plan to get travel information after arriving in Taiwan in 2014

Place to get Travel Information	Unit: persons per hundred				
	Airport Arrival Hall	Internet	Hotel	Visitor Information Center	Travel Agency
Relative Frequency	50.62	38.46	28.19	17.34	16.86

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

Table 5 Kinds of information that inbound visitors hope to get after arriving in Taiwan in 2014

Unit: persons per hundred						
Information Hope to Get	Transportation information	Scenic spots introduction	Restaurant information	Travel or road maps	Accommodation information	Festivals introduction
Relative Frequency	54.17	49.93	49.83	34.44	23.27	18.10

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

C. “Scenery”, “food”, and ”shopping” were the major reasons to attract the inbound visitors to take a sightseeing trip to Taiwan.

The reasons that the inbound visitors went sightseeing in Taiwan were mainly scenery (64 persons per hundred), food (40 persons per hundred), shopping (29 persons per hundred), Taiwan’s customs and culture (25 persons per hundred) and friendliness of the people (22 persons per hundred).

For the inbound visitors from Japan, their main reason to visit Taiwan was “food”. For the inbound visitors from the other countries, their mostly main reason to visit Taiwan was “scenery”.

Table 6 Reasons why the inbound visitors decided to take sightseeing trips to Taiwan in 2014

Unit: persons per hundred							
Item	Scenery	Food	Shopping	Taiwan’s customs and culture	Friendliness of people	Fruits	Historic relics
Relative Frequency	64.31	39.67	28.56	24.85	22.36	19.40	15.86

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

D. 41% 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 42.33% of the inbound visitors visiting Taiwan chose “No arrangements by a Taiwan travel agency after arrival”. Another 29.36% of the inbound visitors visiting Taiwan chose “group tour arranged through a travel agency”.

In terms of the main purpose, 41.09% the inbound visitors with sightseeing as their purpose chose “group tour arranged through a travel agency”. Another 68.05% of the inbound visitors with business as their purpose chose “No arrangements by a Taiwan travel agency after arrival”.

Table 7 Kinds of arrangements the inbound visitors made on their trips in 2014
- according to the main purpose

Unit: row %

Main Purpose	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; jointed the activities arranged by a Taiwan travel agency after arrival	No arrangements by a Taiwan travel agency after arrival
All purposes	29.36	2.65	24.98	0.68	42.33
Sightseeing	41.09	1.79	25.73	0.82	30.58
Business	0.11	3.25	28.48	0.11	68.05
Int'l conference or exhibition	1.47	12.50	30.88	0.74	54.41

III. Analysis of the Inbound Visitors' Behavior

A. The average number of times the inbound visitors have been to Taiwan in the past three years was 1.50 times. A total of 66.25% of the inbound visitors were first time visitors to Taiwan.

A total of 66.25% of the inbound visitors was the first time visitors to Taiwan. The mean time the inbound visitors have been to Taiwan in the past three years was 1.50 times. And 75.25% of the inbound visitors with sightseeing purpose were first time visitors to Taiwan, 38.45% of the inbound visitors with business purpose were first time visitors to Taiwan, 64.71% of the inbound visitors with international conference or exhibition purpose were first time visitors to Taiwan.

Table 8 The percentage of the inbound visitors who were first time visitors to Taiwan in the past three years in 2014 - according to the main purpose

Main Purpose	First time visitors to Taiwan	Unit: %
All purposes	66.25	
Sightseeing	75.25	
Business	38.45	
International conference or exhibition	64.71	

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

The major scenic spots the inbound visitors visited were night markets (79 persons per hundred), Taipei 101 (58 persons per hundred), National Palace Museum (49 persons per hundred), Chiang Kai-Shek Memorial Hall (38 persons per hundred) and Sun Moon Lake (32 persons per hundred), etc.

The inbound visitors with sightseeing, business and international conference or exhibition as their purpose mostly visited “night markets”, “Taipei 101” and the “National Palace Museum.”

The inbound visitors visiting night markets mostly visited Shilin Night Market(43 persons per hundred) and Kaohsiung Liouhe Night Market(13 persons per hundred).

Table 9 Ranking of the major scenic spots inbound visitors visited in 2014

Unit: persons per hundred

Ranking	Scenic spot	Relative persons	Ranking	Scenic spot	Relative persons
1	Night markets	79.00	6	Jiufen	30.47
2	Taipei 101	57.95	7	Kenting National Park	29.72
3	National Palace Museum	49.03	8	Dr. Sun Yat-Sen Memorial Hall	28.16
4	Chiang Kai-Shek Memorial Hal	37.94	9	Taroko, Tienhsiang	26.22
5	Sun Moon Lake	31.97	10	Ximending	24.80

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

C. “Sun Moon Lake” was the favorite scenic spot for the inbound visitors.

The favorite scenic spot for the inbound visitors was “Sun Moon Lake” (26.28%), followed by “Jiufen”, “Kenting National Park”, “Taroko, Tienhsiang” and “Alishan”, (all over 22%).

The favorite scenic spots for the inbound visitors with sightseeing, business and international conference or exhibition as their purpose were “Jiufen”, “Taipei 101” and the “National Palace Museum”, respectively.

Table 10 Ranking of the favorite scenic spots the inbound visitors visited in 2014

Ranking	Scenic spot	Relative persons	Percentage favoring the scenic spot	Ranking	Scenic spot	Relative persons	Percentage favoring the scenic spot
1	Sun Moon Lake	31.97	26.28%	6	Yeliou	24.25	17.09%
2	Jiufen	30.47	25.79%	7	National Palace Museum	49.03	14.44%
3	Kenting National Park	29.72	24.04%	8	Tamsui	24.76	14.12%
4	Taroko, Tienhsiang	26.22	23.77%	9	Ximending	24.80	12.43%
5	Alishan	23.32	22.10%	10	Taipei 101	57.95	11.61%

Note:1. Each Vistor can chose only one favorite scenic spot from those he has visited.

2. 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 (85 persons per hundred), New Taipei City (60 persons per hundred), Nantou County (35 persons per hundred), and Kaohsiung City (32 persons per hundred).

Table 11 Ranking of the major city/county the inbound visitors visited in 2014

Unit: persons per hundred

Ranking	City/county	Relative persons	Ranking	City/county	Relative persons
1	Taipei City	85.35	12	Yilan County	3.98
2	New Taipei City	59.74	13	Keelung City	3.78
3	Nantou County	35.17	14	Changhua County	0.94
4	Kaohsiung City	32.21	15	Hsinchu County	0.81
5	Pingtung County	30.02	16	Hsinchu City	0.43
6	Hualien County	27.52	17	Miaoli County	0.35
7	Chiayi County	23.35	18	Yunlin County	0.17
8	Taitung County	13.53	19	Penghu County	0.15
9	Taichung City	11.09	20	Chiayi City	0.13
10	Tainan City	5.85	21	Kinmen County	0.07
11	Taoyuan County	5.29	22	Lienchiang County	-

Note: 「-」 means no visitor in the sample.

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 (90 persons per hundred), night markets sightseeing (79 persons per hundred), historical relics sightseeing (47 persons per hundred), lake tour (26 persons per hundred) and Hot spring soaking (21 persons per hundred).

The inbound visitors with sightseeing, business and international conferences or exhibitions as their purpose mainly participated in shopping, going to the night markets and historical relics sightseeing while visiting Taiwan.

Table 12 Ranking of the activities the inbound visitors participated in 2014

Unit: persons per hundred

Ranking	Item	Relative persons	Ranking	Item	Relative persons
1	Shopping	90.25	10	Eco tour	2.65
2	Night market sightseeing	79.02	11	Karaoke or K.T.V.	2.15
3	Historical relics sightseeing	46.81	12	Sports or sporting competitions	1.61
4	Lake tour	26.36	13	SPA, sauna	1.57
5	Hot spring soaking	21.25	14	Festival activities	1.38
6	Massage or acupressure	9.81	15	Culture events	0.93
7	Theme park	4.48	16	Health care	0.66
8	Exhibitions	3.93	17	Skin care treatment or manicure nail art	0.58
9	Pubs or night clubs	3.86	18	Taking wedding or salon shots	0.35

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 18.61% over 2013, reaching US\$ 14,615 million in 2014.

In 2014, the average daily expenditures per visitor visiting Taiwan were US\$ 221.76. The details of the proportions of consumption, from highest to lowest were as follows: shopping (33.90%), hotel bill (32.74%) and meals excluding hotel meals (15.04%), etc.

According to the analysis of different purpose, the average daily expenditures of the inbound visitors with business purpose were US\$260.16 per person which was higher than the inbound visitors with international conference or exhibition purpose (US\$240.06 per person) and sightseeing purpose (US\$228.95 per person). As for shopping, the inbound visitors with sightseeing purpose was US\$90.47 per person which was higher than the inbound visitors with all other purposes.

According to the analysis of different markets, the average daily expenditures per visitor from Japan and Mainland China were the highest two (US\$243.33 and \$241.98 respectively). In addition, the shopping amounts of the inbound visitors were as follows: Mainland China (US\$128.46), Hong Kong/Macao (US\$54.98) Singapore(US\$50.83), and Japan (US\$49.08).

In 2014, the annual reduction in the average daily expenditures per visitor visiting Taiwan was 1.03%. Except Japan, Mainland China, Australia, and New Zealand, the rest of the markets had a positive growth, especially Korea with the highest one (10.95%)

Regarding the Japan market, due to its sluggish economy and continuing depreciation of the Japanese yen, the cost of foreign travel became relatively high, making consumers tend to take a conservative consumption attitude. The annual reduction in the average daily expenditures per visitor visiting Taiwan was 8.27%.

Regarding the Mainland China market, due to the operations of tourism law and sumptuary decree, the annual reduction in the average daily expenditures per visitor visiting Taiwan was 6.80%.

Table 13 The Average daily expenditures per visitor in 2014—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	221.76	72.60	33.34	30.14	7.90	2.60	75.18
	Percentage	100.00%	32.74%	15.04%	13.59%	3.56%	1.17%	33.90%
Sightseeing	Amount of money	228.95	62.00	33.13	32.73	8.35	2.28	90.47
	Percentage	100.00%	27.08%	14.47%	14.30%	3.65%	0.99%	39.51%
Business	Amount of money	260.16	146.40	39.95	26.39	7.36	3.00	37.08
	Percentage	100.00%	56.27%	15.35%	10.14%	2.83%	1.15%	14.25%
Int'l conference or exhibition	Amount of money	240.06	120.29	34.32	30.44	7.10	4.96	42.95
	Percentage	100.00%	50.11%	14.29%	12.68%	2.96%	2.07%	17.89%
Visiting friends or relatives	Amount of money	123.03	35.67	25.49	14.65	5.92	4.92	36.38
	Percentage	100.00%	29.00%	20.72%	11.90%	4.81%	4.00%	29.57%
Studies	Amount of money	102.60	34.11	14.08	12.65	7.15	11.05	23.57
	Percentage	100.00%	33.24%	13.72%	12.33%	6.97%	10.77%	22.97%
Medical Treatment	Amount of money	308.11	57.66	16.03	11.66	1.34	191.02	30.40
	Percentage	100.00%	18.71%	5.20%	3.78%	0.44%	62.00%	9.87%

Note: There are only 8 visitors with medical treatment purpose, the figures listed as reference.

Table 14 The average daily expenditures per visitor in 2014-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	221.76	72.60	33.34	30.14	7.90	2.60	75.18
	Percentage	100.00%	32.74%	15.04%	13.59%	3.56%	1.17%	33.90%
Japan	Amount of money	243.33	102.90	37.23	37.72	14.19	2.21	49.08
	Percentage	100.00%	42.29%	15.30%	15.50%	5.83%	0.91%	20.17%
Mainland China	Amount of money	241.98	44.38	29.34	31.09	6.63	2.08	128.46
	Percentage	100.00%	18.34%	12.13%	12.85%	2.74%	0.86%	53.09%
Hong Kong /Macao	Amount of money	198.82	72.02	37.30	23.59	6.79	4.23	54.89
	Percentage	100.00%	36.22%	18.76%	11.87%	3.42%	2.13%	27.61%
Singapore	Amount of money	204.45	80.38	34.32	26.20	9.69	3.03	50.83
	Percentage	100.00%	39.32%	16.79%	12.81%	4.74%	1.48%	24.86%
Korea	Amount of money	216.09	88.61	38.22	34.66	7.05	3.41	44.14
	Percentage	100.00%	41.01%	17.69%	16.04%	3.26%	1.58%	20.43%
Malaysia	Amount of money	165.37	60.97	27.02	21.42	5.29	2.57	48.10
	Percentage	100.00%	36.87%	16.34%	12.95%	3.20%	1.56%	29.09%
U.S.A	Amount of money	211.78	121.63	35.44	23.34	7.02	3.62	20.72
	Percentage	100.00%	57.43%	16.74%	11.02%	3.31%	1.71%	9.79%
Europe	Amount of money	187.71	107.43	28.62	22.32	6.05	2.66	20.62
	Percentage	100.00%	57.24%	15.25%	11.89%	3.22%	1.41%	10.98%
Australia /New Zealand	Amount of money	183.46	73.51	32.87	24.58	9.18	13.57	29.75
	Percentage	100.00%	40.07%	17.92%	13.40%	5.01%	7.39%	16.22%

B. The average amount of daily expenditure in Taiwan of each person of the inbound group visitors with sightseeing purpose from Japan was US\$296.17, with annual decrease 10.8%; and the average amount of Mainland Chinese group visitors was US\$265.34, with annual increase 0.34%.

In 2014, in comparison with Mainland China, Japan and all inbound group visitors with sightseeing as their purpose, the average daily expenditures in Taiwan of each person from Japan was US\$296.17, higher than that of all group visitors, which was US\$265.98, and higher than that of Mainland Chinese group visitors, which was US\$265.34.

As to shopping, the average daily shopping expenditure of each person of the inbound group visitors with sightseeing purpose was US\$171.77 by Mainland Chinese group visitors, higher than that of all group visitors, which was US\$143.52, and higher than that of Japanese group visitors, which was US\$76.63.

Detailed shopping expenditure analysis showed that the inbound group visitors with sightseeing as their purpose from Japan mainly purchased local special products (52.74%), tea (18.14%), and clothes or accessories (12.59%). The inbound group visitors with sightseeing as their purpose from Mainland China mainly purchased Jewelry or jade (30.45%), local special products (22.86%), and clothes or accessories (12.73%).

Compared with last year, the annual decrease in the average daily expenditure of each person of the inbound group visitors with sightseeing purpose from Japan was 10.08%. And the details of the proportions of consumption showed that the amount of entertainment was equal to the amount of last year, but the rest decreased. Especially the amount of shopping decreased most, representing 24.5%. On the shopping details, the proportion spent on jewelry or jade most obviously dropped from 13% to 5%.

In 2014, the average amount of daily expenditure in Taiwan of each person of the inbound group visitors with sightseeing purpose from Mainland China was US\$265.34, which increased by 0.34% over 2013. The amount of shopping expenditure increased by 6.96%, while the rest slightly decreased. On the shopping details, the proportion spent on jewelry or trade has shown a downward trend, (from 35% of 2013 to 30% of 2014), and the rest rose. This showed that the measure of "high-quality group" promoted by the Tourism Bureau had driven tourism-related industries to grow more and distribute benefits evenly.

Table 15 The average daily expenditures of each person of the inbound group visitors with sightseeing as their purpose from Japan and Mainland China interviewed in 2014

Unit: USD

Main Market Main Purpose		Total	Hotel Bills	Meals excludin g hotel meals	Local transportation	Entertain- ment	Miscella- neous expenses	Shopping
All Sightsee -ing groups	Amount of money	265.98	33.69	30.47	45.67	10.16	2.47	143.52
	Percentage	100.00%	12.67%	11.46%	17.17%	3.82%	0.93%	53.96%
Japan Sightsee -ing groups	Amount of money	296.17	59.71	48.24	82.61	24.87	4.12	76.63
	Percentage	100.00%	20.16%	16.29%	27.89%	8.40%	1.39%	25.87%
Mainland China Sightsee -ing groups	Amount of money	265.34	25.74	24.32	34.70	6.95	1.87	171.77
	Percentage	100.00%	9.70%	9.16%	13.08%	2.62%	0.70%	64.73%

Table 16 The average daily expenditures of shopping details of each person of the inbound group visitors with sightseeing as their purpose from All Markets, Japan and Mainland China interviewed in 2014

Unit: USD

Shopping Details	All Sightseeing groups		Japan Sightseeing groups		Mainland China Sightseeing groups	
	Amount of money	Percentage	Amount of money	Percentage	Amount of money	Percentage
Clothes or accessories	17.45	12.16%	9.65	12.59%	21.87	12.73%
Jewelry or jade	38.42	26.77%	3.74	4.88%	52.30	30.45%
Souvenirs or handicraft products	9.40	6.55%	3.36	4.39%	10.07	5.86%
Cosmetics or perfumes	16.19	11.28%	2.46	3.21%	21.37	12.44%
Local special products	38.47	26.80%	40.41	52.74%	39.27	22.86%
Tobacco or alcohol	6.29	4.38%	2.10	2.74%	8.27	4.82%
Chinese herbal medicine or health food	3.28	2.29%	0.53	0.69%	3.24	1.89%
3C or electronic appliances	2.42	1.69%	0.25	0.32%	3.28	1.91%
Tea	10.71	7.46%	13.90	18.14%	11.17	6.51%
Others	0.88	0.61%	0.24	0.31%	0.92	0.54%
Total	143.52	100.00%	76.63	100.00%	171.77	100.00%

C. A total of 20.22% 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 20.22% of the inbound visitors had used the tax refund service. A total of 94.84% of the inbound visitors who had used the tax refund service thought the procedures were convenient.

More than 24.82% of the inbound visitors with sightseeing as their purpose applied for tax refunds. A total of 95.02% of the inbound visitors with sightseeing purpose thought tax refund services were convenient.

Table 17 The tax refund conditions for the inbound visitors in 2014
–according to their main purpose

Main Purpose	Unit: %	
	Applied for tax refund	Thought the procedures were convenient
All Purposes	20.22	94.84
Sightseeing	24.82	95.02
Business	8.18	93.15
Int'l conference or exhibition	11.76	100.00

V. Analysis of the Inbound Visitors' Satisfaction

A. A total of 96% 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 recreational facilities”, “safe social environments” and “safety of accommodation facilities” earned highest satisfaction.

According to the analysis of different markets, more than 92% of the inbound visitors have high overall satisfaction during their trip to Taiwan in 2014. Among these markets, the two types of visitors with the highest level of satisfaction were the Mainland Chinese visitors (98.04%), and Hong Kong/Macao visitors (96.68%).

Table 18 The overall satisfaction of the inbound visitors during this trip to Taiwan in 2014

Item		Mean	Standard Deviation
Convenience	Efficiency of applying for a visa	4.20	0.92
	International transportation to Taiwan	4.42	0.69
	Communication facilities (Int'l public telephone, Internet)	4.20	0.87
	iTaiwan Free WiFi	4.02	1.08
	Access to tourist information	4.29	0.75
	Local transportation	4.42	0.68
	Immigration procedures	4.31	0.80
	Customs procedures	4.34	0.75
Environment Internationalization	Cleanness of road signs and public facilities signs	4.20	0.85
	Access to services in language	4.28	0.88
	Friendliness of Taiwan people	4.68	0.56
Safety	Safety of recreational facilities	4.57	0.59
	Safe social environments	4.57	0.60
	Safety of accommodation facilities	4.57	0.61
	Good public environmental hygiene	4.37	0.76
	Good food hygiene	4.30	0.79
Total	Overall satisfaction	4.51	0.57

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

B. A total of 98% 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 98% of the inbound visitors said they were willing to come back to Taiwan. The purpose of their next trip would be sightseeing (75.03%), business (13.72%), and visit relatives/friends (8.73%). And a total of 99% of the inbound visitors will recommend relatives and friends to visit Taiwan.

Table 19 The main purpose for the inbound visitors to revisit Taiwan in 2014

Unit: %							
The main purpose to revisit Taiwan	Total	Sightseeing	Business	Visit relatives/friends	International conference/exhibition	Study	Medical Treatment
Percentage	100.00	75.03	13.72	8.73	1.07	0.73	0.08

Table 20 The willingness of the inbound visitors to recommend friends or relatives to visit Taiwan in 2014

Unit: %			
Will you recommend friends or relatives to visit Taiwan	Total	Yes	No
Percentage	100.00	98.69	1.31

C. The “friendliness of people” ,”food” 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 Hong Kong/Macao.

In terms of the major market, the favorite country/area was Korea for Japanese visitors, the favorite country/area was Hong Kong/Macao for Mainland Chinese and Canadian visitors, the favorite country/area was Japan for Hong Kong/Macao, Singapore, Korea, U.S.A and European visitors, the favorite country/areas was Thailand for Malaysian visitors, the favorite country/areas was Singapore for Australia/New Zealand visitors.

Compared with other Asian countries/area, Taiwan was concluded by the inbound visitors that friendliness of people (52 persons per hundred), food (26 persons per hundred), scenery (25 persons per hundred) and safe social environment (17 persons per hundred) were its superior items.

Table 21 The favorite Asian countries/area the inbound visitors had ever been to in 2014 (except Taiwan)

Unit: %					
Ranking	Country/area	Percentage favoring the country/area	Ranking	Country/area	Percentage favoring the country/area
1	Japan	22.42	6	Mainland China	5.09
2	Thailand	19.16	7	Malaysia	3.86
3	Hong Kong/Macao	18.43	8	Indonesia	2.73
4	Korea	14.28	9	Philippine	1.59
5	Singapore	12.45			

Table 22 Ranking of Taiwan's superior characteristics as thought of by the inbound visitors in 2014 (compared with their favorite Asian countries/area)

Unit: persons per hundred					
Ranking	Item	Relative persons	Ranking	Item	Relative persons
1	Friendliness of people	52.48	9	Geographical convenience	7.93
2	Food	26.08	10	Historical relics	7.16
3	Scenery	24.90	11	Night life	5.74
4	Safe social environment	16.92	12	Democracy	2.77
5	Fruits	13.30	13	Flowers	1.42
6	Shopping	12.90	14	Festival activities	1.34
7	Customs and culture	12.37	15	Health care	1.34
8	Weather	9.60	16	Recreational facilities	1.26

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

Table 23 The comparison between Taiwan and the inbound visitor's favorite Asian country/area in 2014

Favorite Country/Area	Reason	Superior item in Taiwan
Japan	Scenery, Shopping, Food	Friendliness of people
Thailand	Scenery, Food	Friendliness of people, Safe social environment
Hong Kong/Macao	Shopping	Friendliness of people, Scenery
Korea	Shopping, Food	Friendliness of people
Singapore	Shopping, Safe social environment	Friendliness of people, Scenery, Food
Mainland China	Scenery, Historical relics	Friendliness of people, Safe social environment
Malaysia	Scenery, Food	Friendliness of people
Indonesia	Scenery	Food, Friendliness of people, Safe social environment
Philippine	Scenery	Food, Friendliness of people, Safe social environment

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

The most impressive parts of Taiwan according to inbound visitors were Taiwan’s local friendliness and hospitality (48 persons per hundred), gourmet food (47 persons per hundred), night markets sightseeing (38 persons per hundred).

Table 24 Ranking of the deepest impression of Taiwan as thought of by inbound visitors in 2014

Unit: persons per hundred

Ranking	Item	Relative persons	Ranking	Item	Relative persons
1	Local friendliness and hospitality	48.10	10	Temple	7.91
2	Gourmet food	47.02	11	Hot springs	7.54
3	Night markets sightseeing	38.22	12	24 hour book stores	5.52
4	Coastal view	27.22	13	Aboriginal culture	4.39
5	Fruits	20.93	14	Night life	4.26
6	Convenience stores	15.12	15	Cycling fun	2.62
7	Tourist spots	14.07	16	The accommodation experience	2.01
8	Historical relics	13.29	17	Cosmetic and medical treatments	1.79
9	Famous local products	11.25	18	Festival activities	0.31

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”. And their overall satisfaction of their accommodation is 85%, tending to the degrees of “Good” and “Excellent”.

The main accommodation for the inbound visitors was hotel (83 persons per hundred). The choice of accommodation for the inbound visitors in Taiwan was “General hotels” (69.46%), “International tourist hotels” (22.58%) and “General tourist hotel” (7.96%). The rating of the hotel tend to be “Good and Excellent” (85.39%). The rating of the guest houses (or B&B) tend to be “Good and Excellent” (86.78%). The rating of the youth hostels or community centers tend to be “Good and Excellent” (87.44%).

F. For group tours arranged through a travel agency, the number of shopping trips arranged by local travel agencies was mostly 3-4 times. And 56% of their comments on commodity prices were “good price”.

Of the total of 39.47% of the inbound 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, while 22.25% was 5-6 times. And 55.67% of their comments on commodity prices were “good price”.

G. A total of 95% of the inbound visitors were satisfied with their overall impressions of the travel agencies and the services of the tour guides.

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

H. Over 85% of the inbound visitors were satisfied with the means of public transportation in Taiwan

The inbound visitors were inclined to be satisfied with the means of public transportation in Taiwan (all above 85%), the highest three rankings of satisfaction going to the High Speed Rail (98.01%), MRT (96.83%), and Coach (95.62%).

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 (32.72%), legislators, senior officials and managers (11.90%), and clerical support workers (11.21%).

B. The education level of most inbound visitors was college level or higher and their annual income was mainly “No fixed income”, “between US\$15,000 and US\$29,999”, and “Under US\$9,999.”

The highest category of education on the survey for the inbound visitors was “College, university, graduate school or higher.” Most inbound visitors (79.71%) were in this category. The average annual income of the inbound visitors was US\$ 34,959.52. Those inbound visitors with “no fixed income”, annual income “between US\$15,000 and US\$29,999”, and “under US\$9,999” were the three major categories which made up 21.76%, 16.14% and 14.07% of those inbound visitors, respectively.