

2009 Annual Survey Report on Visitors Expenditure and Trends in Taiwan

Summary

Since the 2008 Global Financial Crisis, all countries have proposed and practiced economic policies which have vastly improved their economic conditions by the end of 2009. Initially, the Japanese were the number one tourist market for Taiwan; however, after the crisis, the number of Japanese tourists who visit Taiwan has declined. This decrease in the number is due to the Japanese recession, the decrease in travel subsidies from companies, and an increase of the fuel tax. Hence, the outbound tourism of Japan experienced negative growth, except that to Korea (because the Korean Won depreciated significantly relative to the Japanese Yen). Besides the decrease in the number of Japanese visitors, the H1N1 epidemic emerged in Mexico in April 2009, which also led to a reduction in tourism to Taiwan. In addition, Typhoon Morakot struck southern Taiwan in August of the same year, causing widespread trepidation among tourists.

Fortunately, as Taiwan government's motto is "Global Positioning, Holistic Marketing," Taiwan has been promoting tourism steadily. The government has targeted various markets, promoting packages to local travel agencies as well as to potential clients via the media. In addition to the packages, the government has promoted special events and activities to tourists, such as "Tour Taiwan Years 2008-2009: Great Quarterly Tourist Giveaway Program", the Key-Words marketing, and the "The Best Trip in the World - Taiwan Explorers Wanted" contest. After these promotions took place in 2009, the number of inbound visitors to Taiwan increased by 14.30%; 29.47% of which came for sightseeing purposes. Moreover, in July 2008, the government opened the gates to Mainland Chinese tourists, and since then, 970,000 visitors from China came to Taiwan, 600,000 of which came in tourist groups. Even after the great financial crisis and tourism recession, the Japanese still remain as the number 1 source of inbound visitors to Taiwan, consisting of one million visitors in 2009. This proves the success of Taiwan's promotions in Japan.

The Tourism Bureau, MOTC expects to understand the motives, viewpoints, tendencies and consumption of the inbound visitors in Taiwan 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 and Taipei Songshan 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, 2009 (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 5,784 persons in total, including 1,363 persons from Japan and 1,289 persons from Mainland China, from January to December, 2009.

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 Beneficial Results of the Inbound Visitors’ Consumption and Taiwan’s Competitiveness in the Asian Tourist Market” and “Analysis of Basic Information of the Inbound Visitors”.

I. Related Indices of the Inbound Visitors in Taiwan

4,395,004 persons	Number of inbound visitors; the annual rate of growth was 14.30%
US\$6,816 million	Total annual amount in visitor expenditures in tourism; the annual rate of growth was 14.82%
US\$1,551	Per capita inbound visitor spending; the annual rate of growth was 0.45%
7.17 nights	Average length of stay (nights) for all inbound visitors; the amount of decrease from the previous year was 0.13 nights
US\$216.30	Average daily expenditures per visitor; the annual rate of growth was 2.29%
2,298,334 persons	Number of inbound visitors with sightseeing purpose; the annual rate of growth was 29.47%
US\$227.27	Average daily expenditures per visitor with sightseeing purpose; the annual rate of growth was -0.31%
795,669 persons	Number of inbound visitors with business purpose; the annual rate of growth was -9.73%
US\$230.68	Average daily expenditures per visitor with business purpose; the annual rate of growth was -0.60%
90%	Overall satisfaction of inbound visitors as a percentage of the total; an increase of 2% from the previous year
40%	Percentage of inbound visitors that had revisited Taiwan in the past three years; an decrease of 9% from the previous year

Table 1 Related Indices of the Inbound Visitors in Taiwan from 2007 to 2009

Index \ Year	2007	2008	2009
Number of inbound visitors	3,716,063 persons	3,845,187 persons	4,395,004 persons
Total annual amount in visitor expenditures in tourism	US\$5,214 million	US\$5,936 million	US\$6,816 million
Per capita inbound visitor spending	US\$1,403	US\$1,544	US\$1,551
Average length of stay for all inbound visitors	6.52 nights	7.30 nights	7.17 nights
Average daily expenditures per visitor	US\$215.21	US\$211.46	US\$216.30
Number of inbound visitors with sightseeing purpose	1,648,507 persons	1,775,229 persons	2,298,334 persons
Average daily expenditures per visitor with sightseeing purpose	US\$245.49	US\$227.98	US\$227.27
Number of inbound visitors with business purpose	930,775 persons	881,431 persons	795,669 persons
Average daily expenditures per visitor with business purpose	US\$204.80	US\$232.08	US\$230.68
Overall satisfaction of inbound visitors as a percentage of the total	86%	88%	90%
Percentage of inbound visitors that had revisited Taiwan	-	49%	40%

Note: 1. 2007 were calculated based on the data which the length of stay is less than or equal to 60 nights.

2008 and 2009 was calculated based on the data which the length of stay is less than or equal to 90 nights.

2. 「-」 indicates no data available.

II. Analysis of the Inbound Visitors' Plans

A. 57% 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, TV/radio, word-of-mouth recommendations from friends or relatives, tourism leaflets of travel agencies and newspapers/magazines.

The percentage of the inbound visitors who had seen the advertisements or read reports about Taiwan before coming here was 57.07%. The source of the advertisements and reports mentioned above were mostly the TV/radio (68 persons per hundred), newspapers/magazines (53 persons per hundred) and internet (51 persons per hundred).

The higher percentages of inbound visitors who had seen the advertisements or read reports include the inbound visitors with sightseeing purpose (70.84%), as well as the inbound visitors coming from Singapore (78.36%), Hong Kong/Macao (77.42%), Malaysia (74.52%), Japan (67.13%) and Mainland China (57.95%).

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

Year	All purposes	Sightseeing	Business	Unit: %
				Int'l conference/ exhibition
2009	57.07	70.84	31.20	36.21

Table 3 How much the inbound visitors were influenced by the media in making their decision to visit Taiwan in 2009

Item	News-papers magazines		Advertisement on subways/buses		TV/radio		Internet		International travel Exhibitions		Outdoor advertisements or billboards		Tourism leaflets of travel agency		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	3.66	1.18	3.27	1.22	3.93	1.12	4.03	1.06	3.28	1.30	3.10	1.24	3.78	1.15	3.87	1.25
Sightseeing	3.67	1.16	3.32	1.22	3.96	1.12	4.08	1.00	3.35	1.23	3.15	1.20	3.86	1.09	3.83	1.24
Business	3.54	1.20	2.96	1.21	3.70	1.17	3.81	1.20	2.91	1.37	2.77	1.25	3.18	1.33	3.53	1.34
International conference/exhibition	3.57	0.81	3.33	0.87	3.83	0.76	3.91	1.02	3.73	0.90	2.89	0.60	4.13	0.89	4.06	0.94
1=not at all 2=somewhat 3=a little 4=a lot 5=entirely																

Note: SD means standard deviation

B. “Hotel” and “airport arrival hall” were cited as the inbound visitors’ preferred locations to obtain travel information, among which “scenic spots introduction”, “transportation information” 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 “hotel” (42 persons per hundred), “airport arrival hall” (41 persons per hundred) and “travel agency” (31 persons per hundred).

The information that the inbound visitors hope to get after arriving in Taiwan were mainly “scenic spots introduction” (59 persons per hundred), “transportations information” (42 persons per hundred) and “restaurant information” (42 persons per hundred).

Table 4 Places where the inbound visitors plan to get travel information after arriving in Taiwan in 2009

Place to get Travel Information	Unit: persons per hundred				
	Hotel	Airport Arrival Hall	Travel Agency	Internet	Visitor Information Center
Relative Frequency	41.67	41.39	30.96	23.32	15.51

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 2009

Unit: persons per hundred

Information Hope to Get	Scenic spots introduction	Transportation information	Restaurant information	Travel or road maps	Theme traveling suggestion
Relative Frequency	58.56	42.43	42.17	39.18	16.89

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

C. “Scenery” and “food” 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” (60 persons per hundred), “food” (45 persons per hundred), “Taiwan’s customs and culture” (37 persons per hundred), “historic relics” (21 persons per hundred), “price of goods” (20 persons per hundred).

For the inbound visitors from Japan, their main reason to visit Taiwan was “food”. For the inbound visitors from Mainland China, Singapore, Korea, Malaysia, USA, Europe, Australia/New Zealand, their main reason to visit Taiwan was “scenery”.

Table 6 Reasons why the inbound visitors decided to take sightseeing trips to Taiwan in 2009

Unit: persons per hundred

Item	Scenery	Food	Taiwan’s customs and culture	Historic relics	Price of goods	Friendliness of people	Geographical convenience	Fruits
Relative Frequency	59.95	44.96	36.65	21.19	20.26	19.49	18.31	13.59

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

D. 53% of the inbound visitors with business purpose and 90% of those whose main purpose was attending international conferences or exhibitions had spent their spare time on sightseeing during their visit in Taiwan.

53.13% of the inbound visitors with business purpose and 89.83% of those whose main purpose was attending international conferences or exhibitions had spent their spare time on sightseeing during their visit in Taiwan. The most length of time for the inbound visitors with business purpose were half a day and one day. And the most length of time for the inbound visitors with international conferences or exhibitions purpose were two days and one day. The major reason why the

inbound visitors with business and international conferences or exhibitions didn't spend their spare time on sightseeing was lack of time.

Table 7 Proportions of inbound visitors for business, international conferences or exhibitions purposes who had spent their spare time on sightseeing during their visit in Taiwan in 2009

		Unit: %	
Year	Main Purpose	Business	International Conference or Exhibit
2009		53.13	89.83

E. 58% 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 40.40% of the inbound visitors visiting Taiwan chose “self-guided tour, without any arrangement by a Taiwan travel agency after arrival”. Another 36.07% of the inbound visitors visiting Taiwan chose “group tour arranged through a travel agency”. Meanwhile 21.08% of the inbound visitors visiting Taiwan chose “accommodations arranged (and ticket booking) through a travel agency”.

In terms of the main purpose, 57.65% the inbound visitors with sightseeing as their purpose chose “group tour arranged through a travel agency”. Another 57.44% of the inbound visitors with business as their purpose chose “self-guided tour, without any arrangement by a Taiwan travel agency after arrival”. And 38.79% of the inbound visitors with international conference or exhibition as their purpose chose “self-guided tour without any arrangement by a Taiwan travel agency after arrival”.

Table 8 Kinds of arrangements the inbound visitors made on their trips in 2009 - according to the main purpose

		Unit: row %			
Main Purpose	Group tour arranged through a travel agency	Individual tour arranged through a travel agency	Accommodations arranged (and ticket booking) through a travel agency	Self-guided tour, with an itinerary plotted and activities arranged by a Taiwan travel agency after arrival	Self-guided tour without any arrangement by a Taiwan travel agency after arrival
All purposes	36.07	2.20	21.08	0.26	40.40
Sightseeing	57.65	3.07	14.64	0.26	24.39
Business	3.98	0.98	37.53	0.07	57.44
Int'l conference or exhibition	20.69	0.86	36.21	3.45	38.79

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 52% of their comments on commodity prices were “good price”.

Of the total of 46.40% 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 26.80% was 5-6 times. And 51.63% of their comments on commodity prices were “good price”.

Table 9 The number of shopping trips arranged by a local travel agency in 2009

Unit: %

Number of shopping	1-2 times	3-4 times	5-6 times	over 7 times
Percentage	16.59	46.40	26.80	10.21

Table 10 Comments on commodity prices they saw on the shopping trip arranged by their local travel agency in 2009

Unit: %

Comments on commodity prices	Very Low price	Low price	Good price	High price	Very high price
Percentage	0.58	13.66	51.63	31.59	2.54

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. And 60% of the inbound visitors were first time visitors to Taiwan.

A total of 60.04% of the inbound visitors were first time visitors to Taiwan. The mean time the inbound visitors have been to Taiwan in the past three years was 1.50 times. The mean time inbound visitors with sightseeing purpose have been to Taiwan in the past three years was 1.50 times. The mean time inbound visitors with a business purpose have been to Taiwan in the past three years was 3.00 times. The mean time of inbound visitors where to attend an international conference or exhibition have been to Taiwan in the past three years was 1.00 times.

Table 11 The percentage of the inbound visitors who were first time visitors to Taiwan in the past three years in 2009 - according to the main purpose

Unit: %

Main Purpose	First time visitors to Taiwan
All purposes	60.04
Sightseeing	74.63
Business	35.25
Int'l conference or exhibition	76.72

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

The major scenic spots the inbound visitors visited were “night markets” (73 persons per hundred), “Taipei 101” (58 persons per hundred), “National Palace Museum”(52 persons per hundred), “Sun Moon Lake”(29 persons per hundred) and “Chiang Kai-Shek Memorial Hall” (26 persons per hundred), etc.

The inbound visitors with sightseeing, business and international conferences or exhibitions 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” (54 persons per hundred) and “Kaohsiung Liouhe Night Market” (17 persons per hundred).

Table 12 Ranking of the major scenic spots inbound visitors visited in 2009

Unit: persons per hundred

Ranking	Scenic spot	Relative persons	Ranking	Scenic spot	Relative persons
1	Night markets	72.77	6	Dr. Sun Yat-sen Memorial Hall	21.84
2	Taipei 101	58.23	7	Danshuei	21.72
3	National Palace Museum	51.57	8	Jiufen	21.33
4	Sun Moon Lake	28.65	9	Taroko, Tienhsiang	19.69
5	Chiang Kai-Shek Memorial Hall	25.69	10	Yeliou	19.29

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

C. “Taroko, Tienhsiang” was the favorite scenic spot for the inbound visitors.

The favorite scenic spot for the inbound visitors was “Taroko, TienHsiang” (42.32%), followed by “Jioufen”, “Alishan”, “Sun Moon Lake”, “National Palace Museum” and the “Wulai” (all over 20%).

In terms of the favorite scenic spot, the first choice of the inbound visitors with sightseeing as their purpose was “Taroko, Tienhsiang”; the inbound visitors with business as their purpose rated “National Palace Museum” as their favorite.

Table 13 Ranking of the favorite scenic spots the inbound visitors visited in 2009

Ranking	Scenic spot	Relative persons	Percentage favoring the scenic spot	Ranking	Scenic spot	Relative persons	Percentage favoring the scenic spot
1	Taroko, Tienhsiang	19.69	42.32%	6	Wulai	2.40	20.14%
2	Jioufen	21.33	33.14%	7	Kenting National Park	13.69	16.67%
3	Alishan	16.87	25.72%	8	Taipei 101	58.23	16.33%
4	Sun Moon Lake	28.65	23.30%	9	Peitou	9.20	15.98%
5	National Palace Museum	51.57	21.19%	10	Taipei Zoo	2.21	15.63%

Note:1. Percentage favoring the scenic spot = (man-time favoring the scenic spot) / (man-time visiting the scenic spot) * 100%

2. Not included in the calculation if the man-time visiting the scenic spot doesn't exceed 100.

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

The major sightseeing cities/counties for the inbound visitors were (in orders): Taipei (81 persons per hundred), Nantou (30 persons per hundred) , Kaohsiung (29 persons per hundred), Haulien(20 persons per hundred), Chiayi (17 persons per hundred) and Pingtung (16 persons per hundred).

Table 14 Ranking of the major city/county the inbound visitors visited in 2009

Unit: persons per hundred

Ranking	City/county	Relative persons	Ranking	City/county	Relative persons
1	Taipei	80.81	10	Keelung	4.36
2	Nantou	29.86	11	Taoyuan	3.04
3	Kaohsiung	29.20	12	Yilan	2.37
4	Haulien	19.85	13	Hsinchu	2.33
5	Chiayi	16.89	14	Changhua	0.76
6	Pingtung	16.10	15	Yunlin	0.66
7	Taitung	9.42	16	Kinmen-Matsu	0.31
8	Tainan	7.95	17	Penghu	0.19
9	Taichung	6.52	18	Miaoli	0.14

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

Favorite activities for the inbound visitors visiting Taiwan were “shopping” (87 persons per hundred), “night markets sightseeing” (73 persons per hundred), “historic relics” (57 persons per hundred), and “outdoor recreation” (30 persons per hundred).

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

Table 15 Ranking of the activities the inbound visitors participated in 2009

Unit: persons per hundred

Ranking	Item	Relative persons	Ranking	Item	Relative persons
1	Shopping	86.81	10	Pubs or night clubs	3.46
2	Night market sightseeing	72.75	11	Culture events	3.35
3	Historic relics	57.19	12	Karaoke or K.T.V.	3.32
4	Outdoor recreation	29.77	13	SPA, sauna	2.40
5	Exhibitions	26.33	14	Skin care treatment or manicure nail art	1.28
6	Lake tour	25.74	15	Local festival activities	1.04
7	Hot springs	24.22	16	Wedding or salon shots	0.67
8	Massage/acupressure	12.14	17	Golfing	0.45
9	Theme park	4.05	18	Health care	0.38

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

IV. Analysis of Beneficial Results of the Inbound Visitors' Consumption and Taiwan's Competitiveness in the Asian Tourist Market

A. A total of 90% 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 accommodation facilities”, “safety of recreational facilities” and “safe social environments” earned highest satisfaction.

Table 16 The overall satisfaction of the inbound visitors during this trip to Taiwan in 2009

Item		Mean	Standard deviation
Convenience	Local transportation	4.11	0.77
	Customs procedures	4.09	0.76
	International transportation to Taiwan (travel arrangements)	4.09	0.79
	Immigration procedures	4.04	0.81
	Efficiency of applying for a visa	4.02	0.95
	Communication facilities (Int'l public telephone, Internet)	3.93	0.89
	Access to tourist information	3.85	0.89
Environment Internationalization	Friendliness of Taiwan people	4.61	0.61
	Access to services in language	4.04	0.95
	Clearness of road signs and public facilities signs	3.96	0.91
Safety	Safety of accommodation facilities	4.36	0.69
	Safety of recreational facilities	4.34	0.68
	Safe social environments	4.33	0.68
	Good public environmental hygiene	4.03	0.81
	Good food hygiene	3.99	0.80
Total	Overall satisfaction	4.22	0.62
1=very poor 2=poor 3=fair 4=good 5=excellent			

B. The amount of total annual income of visitor expenditure was up 14.82% over 2008, reaching US\$ 6,816 million in 2009.

In 2009, the average daily expenditures per visitor visiting Taiwan were US\$ 216.30, and the consumption's annual growth was 2.29%. The details of the proportions of consumption, from highest to lowest were as follows: hotel bill (39.33%), shopping (33.78%) and meals excluding hotel meals (11.61%), etc.

According to the analysis of different markets, the average daily expenditures per visitor from Japan and Mainland China were the highest two (US\$268.96 and \$234.26 respectively). In addition, the shopping amounts of the inbound visitors were as follows: Mainland China, Malaysia and Japan.

Table 17 The average daily expenditures per visitor in 2009 - according to main market
Unit: US\$

Main Market		Hotel Bills	Meals excluding hotel meals	Local transportation	Entertainment	Miscellaneous expenses	Shopping	Total
All	Amount of money	85.06	25.10	18.10	12.46	2.52	73.06	216.30
	Percentage	39.33%	11.60%	8.37%	5.76%	1.16%	33.78%	100.00%
Japan	Amount of money	113.69	31.71	23.85	20.07	2.43	77.21	268.96
	Percentage	42.27%	11.79%	8.87%	7.46%	0.90%	28.71%	100.00%
Mainland China	Amount of money	71.43	14.69	13.92	15.53	1.19	117.50	234.26
	Percentage	30.49%	6.27%	5.94%	6.63%	0.51%	50.16%	100.00%
Hong Kong /Macao	Amount of money	61.40	28.27	16.28	7.64	1.50	60.22	175.31
	Percentage	35.02%	16.13%	9.29%	4.36%	0.85%	34.35%	100.00%
Singapore	Amount of money	76.24	26.14	17.56	7.50	2.97	62.28	192.69
	Percentage	39.57%	13.57%	9.11%	3.89%	1.54%	32.32%	100.00%
Korea	Amount of money	76.31	21.27	16.20	9.63	3.94	39.46	166.81
	Percentage	45.75%	12.75%	9.71%	5.77%	2.36%	23.66%	100.00%
Malaysia	Amount of money	53.81	18.15	14.16	6.03	1.24	78.23	171.62
	Percentage	31.36%	10.58%	8.25%	3.51%	0.72%	45.58%	100.00%
U.S.A	Amount of money	88.47	31.37	20.83	7.70	7.48	36.07	191.92
	Percentage	46.10%	16.35%	10.85%	4.01%	3.90%	18.79%	100.00%
Europe	Amount of money	103.47	24.76	16.82	7.07	4.13	31.81	188.06
	Percentage	55.02%	13.17%	8.94%	3.76%	2.20%	16.91%	100.00%
Australia /New Zealand	Amount of money	101.15	31.55	20.33	7.64	10.19	53.47	224.32
	Percentage	45.09%	14.06%	9.06%	3.41%	4.54%	23.84%	100.00%

C. The average amount of daily expenditure in Taiwan of each person of the inbound group visitors with sightseeing purpose from Japan was US\$314.22, which was higher than that of all group visitors (US\$250.06) and higher than that of Mainland Chinese group visitors (US\$232.11).

In 2009, in comparison with Mainland China and all inbound group visitors with sightseeing as their purpose, the average daily expenditures in Taiwan of each person from Japan was US\$314.22, higher than that of Mainland Chinese visitors, which was US\$232.11, and higher than that of all overall visitors, which was US\$250.06.

As to shopping, the average daily shopping expenditure of each person of the inbound group visitors with sightseeing purpose was US\$115.31 by Mainland Chinese visitors, higher than that of all visitors, which was US\$108.45, and higher than that of Japanese visitors, which was US\$100.88.

Detailed shopping expenditure analysis showed that the inbound group visitors with sightseeing as their purpose from all markets, Japan and Mainland China mainly purchased featured food or special products, representing 36.35%, 48.90% and 29.73% respectively; the second highest purchased by that of Mainland Chinese visitors was Jewelry or jade, representing 25.20%.

Table 18 The average daily expenditures of each person of the inbound group visitors with sightseeing as their purpose from Japan, Mainland China and Korea interviewed in 2009

Unit: US\$

Main Market Main Purpose		Hotel Bills	Meals excluding hotel meals	Local transportation	Entertainment	Miscellaneous expenses	Shopping	Total
All Sightseeing groups	Amount of money	82.77	18.85	17.25	20.93	1.81	108.45	250.06
	Percentage	33.10%	7.54%	6.90%	8.37%	0.72%	43.37%	100.00%
Japan Sightseeing groups	Amount of money	125.54	28.08	24.87	31.70	3.15	100.88	314.22
	Percentage	39.95%	8.94%	7.91%	10.09%	1.00%	32.11%	100.00%
Mainland China Sightseeing groups	Amount of money	68.90	14.78	14.62	17.29	1.21	115.31	232.11
	Percentage	29.68%	6.37%	6.30%	7.45%	0.52%	49.68%	100.00%

Table 19 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 2009

Unit: US\$

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	14.14	13.04%	13.22	13.10%	14.53	12.60%
Jewelry or jade	20.15	18.58%	8.37	8.30%	29.06	25.20%
Souvenirs or handicraft products	9.38	8.65%	6.42	6.36%	9.88	8.57%
Cosmetics or perfumes	6.03	5.56%	5.18	5.14%	6.88	5.97%
Featured food or special products	39.42	36.35%	49.33	48.90%	34.28	29.73%
Tobacco or alcohol	5.12	4.72%	3.65	3.62%	6.56	5.69%
Chinese herbal medicine or health food	2.26	2.08%	1.60	1.59%	1.02	0.88%
3C or electronic appliances	0.87	0.80%	0.62	0.61%	1.20	1.04%
Tea	9.93	9.16%	11.65	11.55%	10.57	9.17%
Others	1.15	1.06%	0.84	0.83%	1.33	1.15%
Total	108.45	100.00%	100.88	100.00%	115.31	100.00%

D. A total of 7.21% of the inbound visitors had used the tax refund service. A total of 90% of the inbound visitors who had used the tax refund service thought the procedures to get a tax refund were convenient.

A total of 7.21% of the inbound visitors had used the tax refund service. A total of 90.17% of the inbound visitors who had used the tax refund service thought the procedures were convenient.

More than 8% of the inbound visitors with sightseeing as their purpose applied for tax refunds. Less than 8% of the inbound visitors with other purposes applied for a tax refund. A total of 90.67% of the inbound visitors with sightseeing purpose thought tax refund services were convenient.

Table 20 The tax refund conditions for the inbound visitors in 2009
–according to their main purpose

Unit: %

Main Purpose	Applied for tax refund	Thought the procedures were convenient.
All Purposes	7.21	90.17
Sightseeing	8.68	90.67
Business	3.66	92.86
Int'l conference or exhibition	5.17	83.33

E. A total of 96% of the inbound visitors were willing to revisit Taiwan, the likely purpose of their next trip would be sightseeing.

A total of 96% of the inbound visitors said they were willing to come back to Taiwan. The purpose of their next trip would be sightseeing (70.60%) and business (20.10%).

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

Unit: %

The main purpose to revisit Taiwan	Sightseeing	Business	Int'l conference/exhibition	Visit relatives/friends	Study	Others
Percentage	70.60	20.10	0.77	7.56	0.52	0.45

F. The “friendliness of people” and “food” 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 China and American visitors, the favorite country/area was Japan for Hong Kong/Macao, Singaporean, Korean and European visitors, the favorite country/area was Singapore for Malaysian visitors, the favorite countries/area were Japan and Hong Kong/Macao for Australian and New Zealand visitors.

Compared with other Asian countries/area, Taiwan was concluded by the inbound visitors that “friendliness of people” (55 persons per hundred) and “food” (32 persons per hundred) were its superior items.

Table 22 The favorite Asian countries/area the inbound visitors had ever been to in 2009 (except Taiwan)

Unit: %

Ranking	Country/area	Percentage favoring the country/area	Ranking	Country/area	Percentage favoring the country/area
1	Japan	22.94	6	Singapore	10.81
2	Thailand	15.72	7	Malaysia	6.04
3	Hong Kong/Macao	15.46	8	Indonesia	3.85
4	Korea	11.87	9	Philippine	1.53
5	Mainland China	11.78			

Table 23 Ranking of Taiwan's superior characteristics as thought of by the inbound visitors in 2009 (compared with their favorite Asian countries/area)

Unit: persons per hundred

Ranking	Item	Relative persons	Ranking	Item	Relative persons
1	Friendliness of people	54.55	9	Weather	7.14
2	Food	32.05	10	Night life	7.01
3	Scenery	27.32	11	Geographical convenience	6.04
4	Prices of goods	19.05	12	Democracy	3.72
5	Historic relics	15.19	13	Recreational facilities	3.33
6	Fruits	13.62	14	Health care	1.97
7	Safe social environment	13.00	15	Flowers	1.53
8	Custom and culture	10.20	16	Festival activities	1.44

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

Table 24 The comparison between Taiwan and the inbound visitor's favorite Asian country/area

Favorite Country	Reason	Superior item in Taiwan
Japan	Scenery, Food	Friendliness of people, Prices of goods, Food
Thailand	Prices of goods, Scenery	Friendliness of people, Food, Scenery
Hong Kong/Macao	Food, Prices of goods	Friendliness of people, Scenery
Korea	Geographical convenience, Food	Friendliness of people, Food
Mainland China	Scenery, Prices of goods	Friendliness of people, Food, Safe social environment
Singapore	Safe social environment, Scenery	Friendliness of people, Scenery, Food
Malaysia	Scenery, Food	Friendliness of people, Scenery, Food
Indonesia	Scenery, Prices of goods	Food, Friendliness of people
Philippine	Scenery, Prices of goods	Food, Friendliness of people

G. Taiwan’s “gourmet food”, “local friendliness and hospitality” 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 “gourmet food” (49 persons per hundred), “local friendliness and hospitality” (40 persons per hundred), “night markets sightseeing” (33 persons per hundred).

In terms of the major tourism markets, Japanese, Hong Kong/Macao, Singaporean, Korean and Malaysian visitors were most impressed with Taiwan’s “gourmet food”, “night markets sightseeing” and “local friendliness and hospitality.” Mainland Chinese tourists were most impressed with Taiwan’s “Sun Moon Lake”, “local friendliness and hospitality” and “coastal view.” And American, European and Australian and New Zealand visitors were most impressed by Taiwan’s “local friendliness and hospitality”, “gourmet food” and “Taipei 101.”

Table 25 Ranking of the deepest impression of Taiwan as thought of by inbound visitors in 2009

Unit: persons per hundred

Ranking	Item	Relative persons	Ranking	Item	Relative persons
1	Gourmet food	48.86	11	Alishan	9.73
2	Local friendliness and hospitality	39.78	12	Temple	8.23
3	Night markets sightseeing	32.52	13	Hot springs	8.14
4	National Palace Museum	24.01	14	Night life	6.85
5	Taipei 101	23.69	15	Aboriginal culture	4.62
6	Forest and seashore ecological landscapes	18.29	16	Traditional crafts	1.94
7	Coastal view	16.36	17	Cosmetic and medical treatments	1.52
8	Sun Moon Lake	14.85	18	3C products	1.23
9	Historical relics	10.22	19	Recreational farm	0.74
10	Famous local products	10.18	20	Cycling fun	0.48

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

V. 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 (29.30%), “office clerks” (23.31%), and “legislators, administrators, business executives or managers”(15.66%).

B. The education level of most inbound visitors was college level or higher and their annual income was mainly “No fixed income”, “between US\$40,000 and US\$69,999” and “Under US\$9,999”.

The highest category of education on the survey for the inbound visitors was “College, University, Graduate School or Doctor”. Most inbound visitors (76.54%) were in this category. The average annual income of the inbound visitors was US\$ 40,076. Those inbound visitors with “no fixed income” and annual income “between US\$40,000 and US\$69,999” were the two major categories which made up 17.76% and 16.25% of those inbound visitors, respectively.

C. The inbound visitors mainly chose “International tourist hotels” for accommodation. And their overall satisfaction of their accommodation is 81%, tending to the degrees of “Good” and “Excellent”.

The main accommodation for the inbound visitors was hotel (87 persons per hundred). The choice of accommodation for the inbound visitors in Taiwan was “International tourist hotels” (47.31%), “General hotels” (45.26%) and “tourist hotel” (7.43%). The rating of the hotel tend to be “Good and Excellent” (81%). The rating of the guest houses (or B&B) tend to be “Good and Excellent” (77%). The rating of the youth hostels or community centers tend to be “Good and Excellent” (71%).

D. A total of 87% 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: “Tour guide service”, “Professionalism of the tour guides”, “Transportation”, “Accommodation”, “Itinerary”, and “Meals”.

E. Over 78% 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, the highest three rankings of satisfaction going to the “High Speed Rail” (96%), “MRT”(93%) and “Coach”(88%).