

2008 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 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 and Kaohsiung International 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, 2008 (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 5,506 persons in total, from January to December, 2008.

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 for the Inbound Visitor’s Market” and “Analysis of Basic Information of the Inbound Visitors”.

I. Related Indices of the Inbound Visitors in Taiwan

3,845,187 persons	Number of inbound visitors; the annual rate of growth was 3.47%
US\$5,936 million	Total annual amount in visitor expenditures in tourism; the annual rate of growth was 13.85%
US\$1,544	Per capita inbound visitor spending; the annual rate of growth was 10.05%
7.30 nights	Average length of stay (nights) for all inbound visitors; the amount of increase from the previous year was 0.78 nights
US\$211.46	Average daily expenditures per visitor; the annual rate of growth was -1.74%
1,775,229 persons	Number of inbound visitors with sightseeing purpose; the annual rate of growth was 7.69%
US\$227.98	Average daily expenditures per visitor with sightseeing purpose; the annual rate of growth was -7.13%
881,431 persons	Number of inbound visitors with business purpose; the annual rate of growth was -5.30%
US\$232.08	Average daily expenditures per visitor with business purpose; the annual rate of growth was 13.32%
88%	Overall satisfaction of inbound visitors as a percentage of the total; an increase of 2% from the year before
49%	Percentage of inbound visitors that had revisited Taiwan in the past three years

Table 1 Related Indices of the Inbound Visitors in Taiwan from 2006 to 2008

Year	2006	2007	2008
Index			
Number of inbound visitors	3,519,827 persons	3,716,063 persons	3,845,187 persons
Total annual amount in visitor expenditures in tourism	US\$5,136 million	US\$5,214 million	US\$5,936 million
Per capita inbound visitor spending	US\$1,459	US\$1,403	US\$1,544
Average length of stay for all inbound visitors	6.92 nights	6.52 nights	7.30 nights
Average daily expenditures per visitor	US\$210.87	US\$215.21	US\$211.46
Number of inbound visitors with sightseeing purpose	1,510,207 persons	1,648,507 persons	1,775,229 persons
Average daily expenditures per visitor with sightseeing purpose	US\$245.47	US\$245.49	US\$227.98
Number of inbound visitors with business purpose	949,836 persons	930,775 persons	881,431 persons
Average daily expenditures per visitor with business purpose	US\$194.10	US\$204.80	US\$232.08
Overall satisfaction of inbound visitors as a percentage of the total	89%	86%	88%
Percentage of inbound visitors that had revisited Taiwan	55%	-	49%

Note: 1.2006 and 2007 were calculated based on the data which the length of stay is less than or equal to 60 nights.

2008 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. 52% 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, newspapers/magazines, TV/radio 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 52.16%. The source of the advertisements and reports mentioned above were mostly the Internet (76 persons per hundred), newspapers/magazines (75 persons per hundred) and TV/radio (71 persons per hundred).

The higher percentages of inbound visitors who had seen the advertisements or read reports include the inbound visitors with sightseeing purpose (68.40%) and international conference/exhibit purpose (53.47%), as well as the inbound visitors coming from Singapore (75.33%), Hong Kong/Macao (70.39%), Malaysia (63.72%), Japan (59.10%), Korea (58.99%) and Mainland China (56.14%).

The visitors indicated that their vacation travel planning was often done through the internet, TV/radio, newspapers/magazines and international travel exhibitions (with the mean larger than 3.5).

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

Unit: %

Year	All purposes	Sightseeing	Business	Int'l conference/ exhibition
2008	52.16	68.40	31.46	53.47

Table 3 How much the inbound visitors were influenced by the media in making their decision to visit Taiwan in 2008

Item	Newspapers/ magazines		Advertisement on subways/buses		TV/radio		Internet		International travel exhibitions		Outdoor advertisements or billboards		Tourism leaflets of travel agency	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD
All purposes	3.79	1.11	2.97	1.22	3.75	1.13	4.04	0.96	3.06	1.32	2.87	1.25	3.62	1.20
Sightseeing	3.94	1.10	2.90	1.29	3.86	1.14	4.11	0.95	3.01	1.38	2.79	1.31	3.79	1.20

Business	3.48	1.11	2.96	1.09	3.45	1.13	3.88	0.97	2.97	1.23	2.85	1.08	3.16	1.13
Int'l conference /exhibition	3.62	0.90	3.24	0.87	3.35	0.79	3.82	0.73	3.54	0.91	3.06	0.87	3.49	0.82
1=not at all 2=somewhat 3=a little 4=a lot 5=entirely														

Note:

SD means standard deviation

B. “Hotel” was cited as the inbound visitors’ preferred location to obtain travel information, among which “scenic spots introduction” and “food information” were viewed as the most desired two.

The places that the inbound visitors plan to get traveling information after arriving in Taiwan were mainly “Hotel” (46 persons per hundred), “Arrival Hall” (42 persons per hundred) and “The Internet” (38 persons per hundred).

The information that the inbound visitors hope to get after arriving in Taiwan were mainly “Scenic spots introduction” (53 persons per hundred), “Food information” (53 persons per hundred) and “Transportations information” (43 persons per hundred).

Table 4 Places where the inbound visitors plan to get travel information after arriving in Taiwan in 2008

Unit: persons

per hundred

Place to get Travel Information	Hotel	Arrival Hall	The Internet	Travel Agency	Visitor Information Center
Relative Frequency	46.42	42.34	38.21	30.78	23.79

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 2008

Unit: persons

per hundred

Information Hope to Get	Scenic spots introduction	Food information	Transporta -tions information	Traveling or driving maps	Accommo -dation information
Relative Frequency	53.45	53.25	42.61	37.90	27.75

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

C. “Food” and “Scenery” 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 “Food” (58 persons per hundred), “Scenery” (57 persons per hundred), “Price of goods” (27 persons per hundred), “Geographical convenience” (26 persons per hundred) and “Historic relics” (25 persons per hundred).

For the inbound visitors from Japan and Hong Kong/Macao, 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 2008

Unit: persons per hundred

Market	Food	Scenery	Price of goods	Geographical convenience	Historic relics	Taiwan's customs and culture	Friendliness of people	Fruits
All purpose	57.85	57.17	26.54	26.02	24.51	22.93	17.53	13.78
Japan	65.53	38.94	25.32	46.17	28.19	13.40	16.17	15.43
Mainland China	41.78	76.89	20.44	12.00	36.89	55.11	20.44	13.33
Hong Kong/ Macao	68.80	58.93	27.72	20.17	15.09	18.14	13.06	12.34
Singapore	66.20	77.46	40.38	22.54	23.94	32.86	23.00	23.47
Korea	36.92	55.61	32.24	23.83	28.04	19.16	18.22	10.28
Malaysia	51.35	68.24	36.49	14.86	16.89	18.92	16.22	15.54
USA	41.13	64.54	17.73	7.80	24.82	27.66	23.40	7.80
Europe	40.35	66.67	8.77	5.26	39.47	38.60	24.56	8.77
Australia/ New Zealand	39.13	78.26	19.57	4.35	23.91	36.96	23.91	15.22

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

D. 54% of the inbound visitors with business purpose and 80% of those whose main purpose was attending international conferences or exhibitions had spent their spare time on sightseeing during their visit in Taiwan.

54.38% of the inbound visitors with business purpose and 79.64% of those whose main purpose was attending international conferences or exhibitions had spent their spare time on sightseeing during their visit in Taiwan. The length of time for the inbound visitors with business purpose was half a day. And the length of time for the inbound visitors with international conferences or exhibitions purpose was 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 2008

Unit: %

Main Purpose	Business	International Conference or Exhibit
Year		
2008	54.38	79.64

E. For those inbound visitors who traveled to Taiwan with the purpose of attending an international conference or exhibition purpose, they tended to be satisfied with their conferences or exhibitions.

These inbound visitors tended to be satisfied with their conferences or exhibitions. Their degree of satisfaction were rated under (from high to low): “Conference/exhibition facilities”, “Agenda/exhibition arrangements”, “Pre/post conference tour” and. “Transportation convenience”.

Table 8 How satisfied the inbound visitors with the purpose of attending international conferences or exhibitions were with their conferences or exhibitions

Satisfaction	Mean	Standard deviation
Conference/exhibition facilities	4.27	0.63
Agenda/exhibition arrangements	4.23	0.66
Pre/post conference tour	4.11	0.83
Transportation convenience	4.08	0.78
1=very poor 2=poor 3=fair 4=good 5=excellent		

F. 43% 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 46.48% of the inbound visitors visiting Taiwan chose “Self-guided tour, without any arrangement by a Taiwan travel agency after arrival”. Another 26.95% of the inbound visitors visiting Taiwan chose “Ticket booking and/or accommodations arranged through a travel agency”. Meanwhile 21.79% of the inbound visitors visiting Taiwan chose “Group tour arranged through a travel agency”.

In terms of the main purpose, 43.48% the inbound visitors with sightseeing as their purpose chose “Group tour arranged through a travel agency”. Another 49.31% of the inbound visitors with business as their purpose chose “Self-guided tour, without any arrangement by a Taiwan travel

agency after arrival”. And 44.44% 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 9 Kinds of arrangements the inbound visitors made on their trips in 2008 – according to the main purpose

Unit: row %

Main Purpose	Group tour arranged through a travel agency	Individual tour arranged through a travel agency	Ticket booking and/or activities arranged through a travel agency
All purposes	21.79	4.23	
Sightseeing	43.48	5.62	
Business	1.38	2.91	
Int'l conference or exhibition	6.25	6.25	

G. For group tours arranged through a travel agency, the number of shopping trips arranged by local travel agencies was mostly 3-4 times. And 63% of their comments on commodity prices were “Good price”.

Of the total of 48.58% 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 24.17% was 5-6 times. And 63.33% of their comments on commodity prices were “Good price”.

Table 10 The number of shopping trips arranged by a local travel agency in 2008

Unit: %

Number of shopping	1-2 times	3-4 times	5-6 times	over 7 times
Percentage	18.33	48.58	24.17	8.92

Table 11 Comments on commodity prices they saw on the shopping trip arranged by their local travel agency in 2008

Unit: %

Comments on commodity prices	Very Low price	Low price	Good price	High price	Very high price
Percentage	0.50	12.50	63.33	22.42	1.25

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 2.45 times. And 51% of the inbound visitors were first time visitors to Taiwan.

A total of 50.87% 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 2.45 times. The mean time inbound visitors with sightseeing purpose have been to Taiwan in the past three years was 1.43 times. The mean time inbound visitors with a business purpose have been to Taiwan in the past three years was 3.73 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 1.44 times.

Table 12 The percentage of the inbound visitors who were first time visitors to Taiwan in the past three years in 2008 – according to the main purpose

Unit: %

Main Purpose	Percentage
All purposes	50.87
Sightseeing	65.04
Business	33.53
Int'l conference or exhibition	65.28

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

The major scenic spots the the inbound visitors visited were “Night markets” (67 persons per hundred), “Taipei 101” (50 persons per hundred), “National Palace Museum”(39 persons per hundred) and “Chiang Kai-Shek Memorial Hall” (31 persons per hundred), etc.

The inbound visitors with sightseeing as their purpose mostly visited “Night markets”, “Taipei 101” and the “National Palace Museum”. The inbound visitors with business and international conferences or exhibitions as their purpose mostly visited “Night markets”, “Taipei 101” and the “Xinyi Commerce District”.

The inbound visitors visiting night markets mostly visited “Shilin Night Market” (48 persons per hundred) and “Kaohsiung Liouhe Night Market” (10 persons per hundred).

Table 13 Ranking of the major scenic spots inbound visitors visited in 2008

Unit: persons per hundred

Ranking	Scenic spot	Relative persons	Ranking	Scenic spot	Relative persons
1	Night markets	67.29	6	Danshuei	26.21
2	Taipei 101	50.40	7	Ximenting	24.14
3	National Palace Museum	39.19	8	Jioufen	21.39
4	Chiang Kai-Shek Memorial Hall	30.86	9	Eastern Taipei	18.03
5	Xingyi Commerce District	27.81	10	National Revolutionary Martyrs Shrine	17.91

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” (47.36%), followed by “Kenting National Park”, “Alishan”, “Jioufen”, “Sun Moon Lake” and the “National Palace Museum” (all over 22%).

In terms of the favorite scenic spot, the first choice of the inbound visitors with sightseeing and business as their purpose, and who were from Japan, Mainland China, Singapore, Korea, Malaysia, the USA and Europe was “Taroko, Tienhsiang”; the inbound visitors with international conferences or exhibitions as their purpose, and who were from Australia and New Zealand rated “National Palace Museum” as their favorite; the inbound visitors from Hong Kong/Macao ranked “Alishan” as their top choice.

Table 14 Ranking of the favorite scenic spots the inbound visitors visited in 2008

Ranking	Scenic spot	Relative persons	Percentage favoring the scenic spot	Ranking	Scenic spot	Relative persons	Percentage favoring the scenic spot
1	Taroko, Tienhsiang	9.97	47.36%	6	National Palace Museum	39.19	22.24%
2	Kenting National Park	5.45	32.33%	7	Danshuei	26.21	18.64%
3	Alishan	5.68	30.03%	8	Maokong	4.23	18.03%
4	Jioufen	21.39	27.84%	9	Taipei 101	50.40	17.33%
5	Sun Moon Lake	11.21	27.55%	10	Wulai	4.10	17.26%

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 30

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

The major sightseeing cities /counties for the inbound visitors were (in orders): Taipei (76 persons per hundred), Kaohsiung (15 persons per hundred) and Nantou (12 persons per hundred). The favorite cities/counties were Taipei and Haulien, respectively.

Table 15 Ranking of the major city/county the inbound visitors visited in 2008

Unit: persons per hundred

Ranking	City/county	Relative persons	Ranking	City/county	Relative persons
1	Taipei	75.81	10	Keelung	5.12
2	Kaohsiung	15.38	11	Taitung	2.60
3	Nantou	12.26	12	Taoyuan	2.34
4	Haulien	10.24	13	Yilan	2.12
5	Taichung	6.19	14	Yunlin	0.60
6	Pingtung	5.90	15	Changhua	0.51
7	Chiayi	5.78	16	Miaoli	0.27
8	Hsinchu	5.30	17	Kinmen-Matsu	0.07
9	Tainan	5.19	18	Penghu	0.05

Note: Visitors interviewed were

allowed to choose more than one item in this question

Table 16 Ranking of the favorite city/county that the inbound visitors visited in 2008

Unit: %

Ranking	City/county	Percentage favoring the city/county	Ranking	City/county	Percentage favoring the city/county
1	Taipei	66.75	4	Pingtung	31.69
2	Haulien	47.52	5	Chiayi	30.19

3	Nantou	32.00	6	Yilan	20.51
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Note: 1. (Percentage favoring the city/county) = (man-time favoring the city/county) / (man-time visiting the city/county) * 100%

2. Not included in the calculation

if the man-time visiting the city/county doesn't exceed 30

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” (85 persons per hundred), “night markets sightseeing” (67 persons per hundred), “historic relics” (51 persons per hundred), and “outdoor recreation” (30 persons per hundred). Thanks to “Great Quarterly Tourist Giveaway Program”, a campaign held in years 2008-2009 and sponsored by the Taiwan Tourism Bureau, MOTC, there was a significant increase in the number of inbound visitors attending “hot springs” and “theme parks”.

Table 17 Ranking of the activities the inbound visitors participated in 2008

Unit: persons per hundred

Ranking	Item	Relative persons	Ranking	Item	Relative persons
1	Shopping	84.93	10	Pubs or night clubs	8.21
2	Night market sightseeing	67.45	11	Culture events	5.39
3	Historic relics	51.42	12	Karaoke or K.T.V.	5.27
4	Outdoor recreation	29.71	13	SPA, sauna	4.96
5	Exhibitions	23.70	14	Local festival activities	3.72
6	Hot springs	22.94	15	Skin care treatment or manicure nail art	2.82
7	Massage/acupressure	15.46	16	Wedding or salon shots	1.51
8	Theme park	13.06	17	Golfing	1.42
9	Lake tour	11.46	18	Health care	0.96

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

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

A. A total of 88% 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", "Safe social environments" and "Safety of recreational facilities" earned highest satisfaction.

Table 18 The overall satisfaction of the inbound visitors during this trip to Taiwan in 2008

	Item	Mean	Standard deviation
Convenience	Efficiency of applying for a visa	4.11	0.96
	International transportation to Taiwan (travel arrangements)	4.09	0.81
	Local transportation	4.08	0.79
	Customs procedures	4.06	0.79
	Immigration procedures	4.01	0.81
	Communication facilities (Int'l public telephone, Internet)	3.97	0.82
	Access to tourist information	3.89	0.84
Environment Internationalization	Friendliness of Taiwan people	4.50	0.67
	Access to services in English	3.89	0.95
	Clearness of road signs and public facilities signs	3.85	0.90
Safety	Safety of accommodation facilities	4.32	0.72
	Safe social environments	4.26	0.71
	Safety of recreational facilities	4.26	0.72
	Good public environmental hygiene	3.89	0.84
	Good food hygiene	3.88	0.83

Total	Overall satisfaction	4.18	0.63
1=very poor 2=poor 3=fair 4=good 5=excellent			

B. The amount of total annual income of visitor expenditure was up 13.85% over 2007, reaching US\$ 5,936 million in 2008.

In 2008, the average daily expenditures per visitor visiting Taiwan were US\$ 211.46, and the consumption's annual growth was -1.74%. The details of the proportions of consumption, from highest to lowest were as follows: Hotel bill (43.90%), Shopping (27.35%) and Meals excluding hotel meals (12.34%), etc.

According to the analysis of different markets, the average daily expenditures per visitor from Japan were the highest (US\$260.47). In addition, the shopping amounts of the inbound visitors were as follows: Mainland China, Singapore, Japan, Malaysia and Hong Kong /Macao.

Table 19 The average daily expenditures per visitor in 2008—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	92.83	26.09	17.11	14.02	3.58	57.83	211.46
	Percentage	43.90%	12.34%	8.09%	6.63%	1.69%	27.35%	100.00%
Japan	Amount of money	111.49	31.43	22.63	22.68	3.55	68.69	260.47
	Percentage	42.80%	12.07%	8.69%	8.71%	1.36%	26.37%	100.00%
Mainland China	Amount of money	89.11	15.62	14.12	16.22	2.28	93.75	231.10
	Percentage	38.56%	6.76%	6.11%	7.02%	0.99%	40.57%	100.00%
Hong Kong /Macao	Amount of money	57.03	26.60	14.66	10.53	2.50	57.33	168.65
	Percentage	33.82%	15.77%	8.69%	6.24%	1.48%	34.00%	100.00%
Singapore	Amount of money	74.09	21.71	15.21	11.84	3.04	68.75	194.64
	Percentage	38.07%	11.15%	7.82%	6.08%	1.56%	35.32%	100.00%

Korea	Amount of money	89.74	16.22	17.36	16.93	6.91	49.08	196.24
	Percentage	45.73%	8.27%	8.85%	8.63%	3.52%	25.01%	100.00%
Malaysia	Amount of money	60.23	19.97	11.78	8.49	2.60	57.96	161.03
	Percentage	37.40%	12.40%	7.31%	5.27%	1.61%	36.00%	100.00%
U.S.A	Amount of money	101.64	28.82	15.07	7.00	3.64	36.98	193.14
	Percentage	52.62%	14.92%	7.80%	3.62%	1.88%	19.15%	100.00%
Europe	Amount of money	119.44	30.87	17.33	9.17	4.22	33.94	214.97
	Percentage	55.56%	14.36%	8.06%	4.26%	1.96%	15.79%	100.00%
Australia /New Zealand	Amount of money	133.36	30.89	20.03	17.79	3.88	53.97	259.92
	Percentage	51.31%	11.89%	7.71%	6.85%	1.49%	20.76%	100.00%

C. The average amount of daily expenditure in Taiwan of each person of the inbound group visitors with sightseeing purpose from Mainland China was US\$295.00, which was lower than that of Japanese group visitors (US\$335.56) and higher than that of all group visitors (US\$268.34).

In 2008, in comparison with Japan and all inbound group visitors with sightseeing as their purpose, the average daily expenditures in Taiwan of each person from Mainland China was US\$295.00, lower than that of Japanese visitors, which was US\$335.56, but higher than that of all overall visitors, which was US\$268.34.

As to shopping, the average daily shopping expenditure of each person of the inbound group visitors with sightseeing purpose was US\$131.36 by Mainland Chinese visitors, higher than that of Japanese visitors, which was US\$97.87, and, higher than that of all visitors, which was US\$89.42.

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 44.43%, 56.72% and 25.14% respectively.

Table 20 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 2008

Unit: US\$

Main Market Main Purpose		Hotel Bills	Meals excluding hotel meals	Local transpor- tation	Entertain-ment	Miscella- neous expenses	Shopping	Total
All Sightsee -ing groups	Amount of money	100.53	17.03	24.97	34.19	2.19	89.42	268.34
	Percentage	37.47%	6.35%	9.31%	12.74%	0.82%	33.32%	100.00%
Japan Sightsee -ing groups	Amount of money	133.62	24.09	31.81	45.57	2.60	97.87	335.56
	Percentage	39.82%	7.18%	9.48%	13.58%	0.77%	29.17%	100.00%
Mainland China Sightsee -ing groups	Amount of money	95.04	9.18	24.00	34.14	1.28	131.36	295.00
	Percentage	32.22%	3.11%	8.13%	11.57%	0.43%	44.53%	100.00%

Table 21 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 2008

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	11.37	12.72%	10.99	11.23%	17.13	13.04%
Jewelry or jade	9.74	10.89%	4.88	4.99%	29.43	22.40%
Souvenirs or handicraft products	8.06	9.02%	5.18	5.29%	15.39	11.72%
Cosmetics or perfumes	3.53	3.95%	4.04	4.13%	3.70	2.82%
Featured food or special products	39.73	44.43%	55.52	56.72%	33.02	25.14%
Tobacco or alcohol	2.97	3.32%	3.31	3.38%	6.39	4.86%
Chinese herbal medicine or health food	3.68	4.11%	2.15	2.19%	1.55	1.18%
3C or electronic appliances	0.99	1.11%	0.86	0.87%	1.50	1.14%
Tea	7.35	8.21%	8.80	8.99%	13.68	10.41%
Others	2.01	2.24%	2.15	2.19%	9.57	7.28%
Total	89.42	100.00%	97.87	100.00%	131.36	100.00%

D. A total of 6.74% of the inbound visitors had used the tax refund service. A total of 87% of the inbound visitors who had used the tax refund service thought the procedures to get a tax refund were convenient.

A total of 6.74% of the inbound visitors had used the tax refund service. A total of 87.06% of the inbound visitors who had used the tax refund service thought the procedures were convenient.

More than 9% of the inbound visitors with international conference or exhibition as their purpose and from Japan applied for tax refunds. Less than 9% of the inbound visitors with other purposes and from other markets applied for a tax refund. A total of 100.00% of the inbound visitors with international conference or exhibition purpose thought tax refund services were convenient. And 91.43% of the inbound visitors from Mainland China thought the procedures were convenient.

Table 22 The tax refund conditions for the inbound visitors in 2008 –according to their main purpose

Unit: %

Main Purpose	Applied for tax refund	Thought the procedures were convenient.
All Purposes	6.74	87.06
Sightseeing	8.56	87.05
Business	4.34	87.80
Int'l conference or exhibition	9.72	100.00

E. 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 98% of the inbound visitors said they were willing to come back to Taiwan. The purpose of their next trip would be sightseeing (58.75%) and business (28.61%).

Table 23 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	58.74	28.61	0.93	9.37	0.85	1.50
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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.

Compared with other Asia countries/area, Taiwan was concluded by the inbound visitors that “Friendliness of people” (55 persons per hundred) and “Food” (48 persons per hundred) were its superior items.

Table 24 Ranking of Taiwan’s superior characteristics as thought of by the inbound visitors in 2008 (compared with their favorite Asian counties/area)

Unit: persons per hundred

Ranking	Item	Relative persons	Ranking	Item	Relative persons
1	Friendliness of people	54.84	9	Recreational facilities	15.84
2	Food	47.95	10	Custom and culture	10.61
3	Scenery	30.42	11	Weather	10.29
4	Prices of goods	30.42	12	Geographical convenience	9.40
5	Fruits	22.96	13	Festival activities	9.15
6	Night life	20.78	14	Democracy	6.64
7	Safe social environment	17.05	15	Flowers	4.98
8	Historic relics	16.16	16	Health care	3.77

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 (32.71%), “legislators, administrators, business executives and managers”(19.00%), and clerks (18.63%).

B. The education level of most inbound visitors was college level or higher and their annual income was mainly “between US\$40,000 and US\$69,999” and “between US\$30,000 and US\$39,999”.

The highest category of education on the survey for the inbound visitors was “College, University, Graduate School or Doctor”. Most inbound visitors (80.51%) were in this category. The average annual income of the inbound visitors was US\$ 50,800. Those inbound visitors with annual income “between US\$40,000 and US\$69,999” and “between US\$30,000 and US\$39,999” were the two major categories which made up 20.45% and 15.93% of those inbound visitors, respectively.

C. The inbound visitors mainly chose “International tourist hotels” for accommodation. And their overall satisfaction of their accommodation is 80%, tending to the degrees of “Good” and “Excellent”.

The main accommodation for the inbound visitors was hotel (84 persons per hundred). The choice of accommodation for the inbound visitors in Taiwan was “International tourist hotels” (52.79%), “General hotels” (38.47%) and “tourist hotel” (8.74%). The rating of the hotel tend to be “Good and Excellent” (80%). The rating of the guest houses (or B&B) tend to be “Good and Excellent” (48%). The rating of the youth hostels or community centers tend to be “Good and Excellent” (71%).

D. A total of 85% 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”, “Accommodation”, “Transportation”, “Itinerary”, and “Meals”.