

2004 Survey of Travel by R.O.C. Citizens

Executive Summary

The objectives of this study are to have a better understanding of R.O.C. citizens' travel activities, consumer satisfaction, and purchase amounts, to analyze the mutual effects between domestic and outbound travel, and to estimate on expenses on domestic and outbound travel in the year 2004 for providing reference for policy makers needing information on developing new tourist facilities, improving travel environments, upgrading the quality of tourism, and initiating new tourism policies.

The target population of this survey was all R.O.C. citizens aged 12 or above. Survey interviews were respectively carried out in May for the first quarter (Q1), July for the second quarter (Q2), October for the third quarter (Q3), and January, 2005 for the fourth quarter (Q4) in 2004. The interviews were conducted by telephone with a computer-assisted telephone interviewing system (CATI), while adopting a stratified random sampling for sample selection. Valid sample numbers were: 4,801 for Q1 (361 of which traveled outbound), 4,619 for Q2 (379 of which traveled outbound), 4,539 for Q3 (362 of which traveled outbound), and 4,553 for Q4 (379 of which traveled outbound). With a 95% confidence interval, the range of error for each season fell between $\pm 1.4\%$. Important findings of this survey are summarized and analyzed as follows:

I. Domestic Travel

- 1. Nine out of ten citizens had domestic travel in 2004, showing no significant difference from that in 2003:** In the year 2004, 90% of citizens aged 12 or above traveled domestically at least once, showing no significant difference from the previous two years (2002 and 2003). Travel rates in each quarter are as follows: Figures for Q1 and Q4 2004 were slightly lower than those in the same periods in 2003, but higher than those in the same period in 2002. The figure for Q2 2004 exceeded those in the same periods in 2003 (when SARS struck) and 2002. The figure in Q3 2004 approximately equaled those in the same periods in the previous two years. As a whole, travel rates in the four seasons of 2004 were similar to those for 2002, with the peak in Q1 and the lowest point in Q4.

Proportions of People Having Domestic Travels

Year	Proportion of People Traveled (%)				
	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	Whole Year

2004	66.5	61.1	61.9	57.0	90.0
2003	68.2	51.7	61.6	60.1	90.1
2002	65.4	60.1	61.4	56.6	89.7

Note : The travel rate in 2003 Q2 is relatively lower due to SARS.

2. **In 2004, the estimated total number of domestic tourist trips made by R.O.C. citizens was over 109,338,000, a 6.8% increase from the previous year:** The average number of trips made per person during the year 2004 was 5.70 (higher than 5.39 in 2003). The estimated total number of domestic tourist trips made by citizens aged 12 and above was 109,338,000 in 2004, while the total number of trips made by all citizens (including children under 12 who traveled with) hit 131,553,000 the same year.

Average Number of Domestic Travel Made by R.O.C. Citizens

Unit: Trips

Year	Average Number of Trips per Person				
	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	Whole Year
2004	1.41	1.43	1.49	1.37	5.70
2003	1.51	1.15	1.34	1.39	5.39
2002	1.37	1.37	1.60	1.31	5.62

3. **“Did Not Have Time” was the main reason for not making any domestic travel, while the proportion “Not Interested” saw a continuous decline year by year:** During the year 2004, one out of ten people did not make any domestic travel all year round. Among the non-travelers, 49% “Did Not Have Time,” 12% were “Not Interested,” 11% “Could Not Afford It”, and 9% refrained from traveling because of “Poor Health.” When taking a closer look at the survey results of the past three years, we found the following facts: Except for year 2003 (when SARS struck the nation) with “Did Not Have Time,” “Not Interested,” and “Poor Health” as the main reasons for not making any domestic travel, the top three reasons for non-travelers in both 2002 and 2004 were “Did Not Have Time,” “Not Interested,” and “Could Not Afford It.”. Among the reasons, “Did Not Have Time” showed an upward trend (6% more in 2004 than in 2003) whereas “Not Interested” saw a decline year by year.

Reasons for Not Traveling

Unit: %

Item	2004	2003	2002
Total	100.0	100.0	100.0
Outbound travel	1.3	1.2	2.0
Not Interested	17.3 (2)	20.4 (2)	21.1 (2)

Did Not Have Time	49.0 (1)	39.9 (1)	43.0 (1)
Could Not Find Companions	1.9	0.7	1.8
Did Not Know Good Tourist Place	2.0	1.5	0.9
Could Not Afford	14.5 (3)	11.9 (4)	15.8 (3)
Transportation Problem	2.8	1.3	0.6
Poor Health	9.3 (4)	20.3 (3)	12.1 (4)
Too Crowded in Tourist Place	0.5	0.4	0.2
Poor Weather	0.7	0.5	0.6
Other Reasons	0.7	1.8	2.0

Note : The numbers in parentheses are the rankings of items exceeding 5%.

4. **Domestic tourist trips made on weekdays increased:** In the year 2004, most domestic tourist trips were made on Saturday and Sunday (61%) while 32.5% of trips took place on weekdays, and 7% on national holidays. The proportion of weekday tourist trips showed an obvious growth, higher than that in 2003 (25.9% for weekday travel) and 2002 (26.8% for weekday travel), indicating the policy of balancing off-peak times was effective.

Days Used for Domestic Travel

Unit: %

Day of travel	2004	2003	2002
Total	100.0	100.0	100.0
National Holidays	6.7	13.2	15.7
Weekends	60.8	60.9	57.5
Weekdays	32.5	25.9	26.8
Annual Leaves	3.2	7.2	5.4
Summer or Winter Breaks	6.2	3.5	3.7
Other Weekdays	23.1	15.2	17.7

5. **The proportion of travelers who traveled mainly for “Sightseeing Recreation, and Vacation” has increased year by year. In particular, the proportion of “Physical Exercise” has showed a rather obvious growth in proportion:** During the year 2004, most R.O.C. citizens who traveled domestically were for “Sightseeing, Recreation, and Vacation” (82%). Among them, 60% did so solely for pleasure. Compare the survey results in the past three years, and it was found that there was an upward trend for “Sightseeing, Recreation, and Vacation” (from 78% in 2002 to 82% in 2004), while the sub-item of “Physical Exercise” under “Sightseeing, Recreation, and Vacation” showed the most noticeable growth (from 4% in 2002 to 12% in 2004).

Purposes of Domestic Travel

Unit: %

Purpose of the Trip	2004	2003	2002
Total	100.0	100.0	100.0

Sightseeing, Recreation, Vacation	81.5	78.1	77.7
Solely for Pleasure	60.3	61.4	60.5
Physical Exercising Vacation	12.1	7.5	4.0
Ecological Tour	3.9	2.9	5.9
Conference or Studying Tour	1.8	1.0	1.3
Religious Tour	3.4	5.3	6.0
Business	1.1	1.0	1.5
Visiting Friends and Relatives	11.7	19.3	18.7
Others	5.7	1.7	2.1

6. The proportion of long-distance travel shows an upward trend: For the year 2004, approximately 61% of the trips took place within the travelers' living regions and 39% outside the travelers' living regions (a 4% rise from 2003). In each region, more than 48% of the tourist trips were made by its inhabitants. As for duration of the trips, most of them (61%) were same-day returns, followed by 2-3 days (35% of the total travel; 3% up from 2003), while the average duration of each trip was 1.7 days, relatively the same as 2003.

Proportion of Domestic Visits in Each Region, 2004

unit: row %

Region Visited Residence	North Region	Central Region	South Region	East Region	Kim-mar Region
North Region	60.6	20.2	16.1	8.3	0.8
Central Region	19.3	56.6	24.0	6.3	0.4
South Region	14.1	18.5	63.9	9.4	0.5
East Region	24.8	12.8	21.1	48.4	0.3
Kim-mar Region	39.5	7.8	8.4	3.1	62.9

Note : This item was multi-choice.

Distribution on Duration of Travel Trips

Number of Days Traveled	2004 (Unit:%)	2003 (Unit:%)
Total	100.0	100.0
1 Day	61.1	63.8
2 Days	23.8	22.4
3 Days	11.2	9.4
4 Days and Over	3.9	4.5
Average Duration of Each Trip	1.7days	1.7days

7. The proportion of overnight travel increased, and the number of travelers who stayed in hotels or home stay accommodation rose: According to surveys, 61% of domestic travel were same-day

return, followed by the number of overnight stays in hotels and home stay (21%). Compared with the figures in 2003, the proportion of overnight stays at hotels and home stay increased (respectively 3% and 2%), while the proportions of same-day return travel and overnight stays with friends or relatives decreased (3% in both cases).

Distribution of Accommodation Choices

Accommodation Choice	2004 (Unit:%)	2003 (Unit:%)
Total	100.0	100.0
Same-Day Return	60.9	63.6
Hotel	21.0	17.6
Reception House or Activity Center	1.4	2.4
Home Stay	4.4	2.4
Camping	1.1	1.2
Friend's & Relative's	10.7	13.4
Others	0.5	0.6

8. The majority of travelers planned the trips themselves while the number of travelers who used the Internet for information gathering increased: Most domestic travelers planned their trips themselves (87%) while other types of planning were each used by less than 6% of the tourists. In addition, during the whole year, 5% of trips were arranged by travel agencies while about the same proportion of trips were purchased on the Internet. 32% of travelers not obtained travel information before their trips. Among those who obtained travel information before their trips, 55% did so via their friends, relatives, colleagues, and classmates, while 22% (nearly 6% up from the previous year) of them used the Internet to do so, marking the greatest increase of all information sources.

Sources of Travel Information

Unit:%

Information Sources		2004	2003
Electronic Media	Television	14.4	14.1
	Radio		1.2
	Outdoor Bulletin		1.2
Print	Newspaper	17.2	11.2

Media	Travel Books		8.1
	Magazines		6.1
Internet		22.0	16.4
Tourism Bureau or Agencies		4.8	4.0
Friends, Relatives, Colleagues, Classmates		55.4	53.6
Travel Agencies		2.2	3.0
Tourism Show or Exhibits		0.4	0.7
Others		2.9	2.5

Note : 1. For the year 2004, Television, Radio, and Outdoor Bulletins become sub-items under Electronic Media, while Newspapers, Magazines, and Travel Books go under Print Media.

2. Those who have never asked for travel information have been excluded from this table.

9. “Shopping” and “Camping, Mountain Climbing, Hiking on Forest Walks” are the favorite activities for tourists: The most important factors tourists considered in choosing the destinations they visited were “Beautiful Natural Scenery” (20%), followed by “The Distance of Destinations and Length of Holidays” (16%). The activities they enjoyed more during their travel were “Shopping” (24%), “Camping, Mountain Climbing, Hiking on Forest Walks” (22%), “Observing Coastal Geological Scenery” (13%), “Tasting Good Food” (12%), “Observing Animals and Plants” (11%), and “Enjoying Hot Spring and Spa” (10%). In addition, tourist activities in different regions of the nation also reveal different preferences: “Shopping” and “Tasting Good Food” prevailed in the Northern Region, “Camping, Mountain Climbing, Hiking on Forest Walks,” “Theme Park Activities,” and “Religious Activities” were popular in the Central Region, while tourists in the Southern Region preferred “Visiting Cultural/Historic Spots,” and “Swimming, Snorkeling, White-Water Rafting, and “Taking a Pleasure Boat,” and those in the Eastern Region went for “Observing Coastal Geological Scenery and Wetland Ecology,” “Enjoying Hot Springs and Spa,” “Observing Animals and Plants,” “Observing Sunrise, Snowfall, and Natural Landscape,” and “Festival and Holiday Activities and Watching Performance Shows.”

10. Tamshui, Dongshan River Scenic Area, and National Museum of Marine Biology & Aquarium are the top three most visited domestic tourist spots: the Northern Region was visited by a large number of tourists, accounting for 37%, followed in order by the Southern Region (31%), the Central Region (29%), the Eastern Region (9%), and the Jin-Ma Region (1%). As for places visited by tourists, Tamshui was most visited, followed by Dongshan River Scenic Area and National Museum of Marine Biology & Aquarium. The average number of places visited on each trip was 1.46. In terms of national parks, Kenting National Park enjoyed the highest visit proportion (7.8%) while the East Coast National Scenic Area outperformed other national scenic areas (4.4%). Hualien-Taitung tour route, the Hengchun Peninsula tour route, and the North Coast tour route were the top three most

popular routes for travel tour package, each with a visit proportion of over 8%.

2004 Top 10 Most Visited Domestic Tourist Spots

Tourist Place	Percentage
Tamshui	3.49
Dongshan River Scenic Area	1.96
National Museum of Marine Biology & Aquarium	1.88
Hualien Ocean Park	1.75
Jhihben Hot Springs Scenic Area	1.66
Hsimen Ding	1.57
JanFuSun Theme Park	1.51
Sun Moon Lake	1.51
Business District of East Taipei City	1.43
Tsing Ching Farm	1.36

2004 Proportions of Tourists Visiting National Parks

National Parks	Percentage
Kenting National Park	7.82
Yanmingshan National Park	4.34
Taroko National Park	2.70
Yushan National Park	0.85
Shei-Pa National Park	0.54
Kinmen National Park	0.48

Note : National Park Visit Proportion = (the Person-Trips to One Place of the National Park ÷ Total Person-Trips) × 100

2004 Proportions of Tourists Visiting National Scenic Areas

National Scenic Areas	Percentage	National Scenic Areas	Percentage
East Coast	4.42	Southwest Coast	1.76
Tri-Mountain	3.74	Alishan	1.71

Sun Moon Lake	3.06	Northeast Coast	1.20
East Rift Valley	2.25	Penghu	0.57
North Coast & Guanyinshan	1.89	Tapeng Bay	0.55
Maolin	1.83	Matzu	0.10

Note : National Scenic Area Visit Proportion = (the Person-Trips to One Place of the National Scenic Area ÷ Total Person-Trips) × 100

2004 Proportions of Tourists Visiting the 13 Package-Tour Routes

Package Tour Routes	Percentage	Package Tour Routes	Percentage
Hualien-Taitung	10.09	Taoyuan-Hsinchu-Miaoli	3.58
Hengchun Peninsula	9.08	Kaohsiung-Pingtung Mountain Area	2.76
North Coast	8.68	Alishan	1.76
Central Mountain Range	6.80	Penghu Offshore Island	0.90
Lanyang Northern Cross-Island	5.89	Kinmen Offshore Island	0.69
Sun Moon Lake	4.62	Matzu Offshore Island	0.09
Yunlin-Chiayi-Tainan Coastal	3.82		

Note : Package Tour Travel Route Visit Proportion = (the Person-Trips to One Place of the Route ÷ Total Person-Trips) × 100

11. 94% of all travelers were satisfied with the overall impressions they had with their visit destinations. They were most satisfied with “Staff Services in Visit Destinations” and “Travel Safety”: In the year 2004, domestic travelers were most satisfied with the “Staff Services in Visit Destinations,” and “Travel Safety,” each went beyond 90%. However, about 20-30% of all tourists were dissatisfied with “Admission Charges,” “Levitation of Traffic Tams,” “Public Transport Connections to Outside,” and “Parking Facilities.” fast improvement and effective measures need to be taken to address these aspects.

Visitors' Degree of Satisfaction toward Tourist Spots in 2004

Unit:%

Item	Total	Satisfied	Dissatisfied	No Opinion
Staff Services in Visit Destinations	100.0	91.1	6.6	2.3
Travel Safety	100.0	90.1	9.0	0.9

Natural Scenery and Natural Resources Protection	100.0	86.2	11.8	2.0
Lodging facilities	100.0	85.5	9.6	4.9
Food Facilities	100.0	84.9	13.6	1.5
Amusement facilities	100.0	83.1	12.3	4.6
Signs and Directions	100.0	83.0	14.7	2.3
Ground Maintenance	100.0	82.8	16.5	0.7
Lavatories	100.0	79.6	18.9	1.5
Parking Facilities	100.0	76.7	20.4	2.9
Levitation of Traffic Tams	100.0	72.7	25.7	1.6
Public Transport Connections to Outside	100.0	72.2	22.1	5.7
Admission Charges	100.0	65.6	29.9	4.5
Overall Satisfaction	100.0	94.1	5.6	0.3

Note: "Satisfied" includes "Very Satisfied" and "Passably Satisfied"; "Dissatisfied" includes "Not Satisfied" and "Very Dissatisfied."

12. R.O.C. citizens' total domestic travel expenditure in 2004 was NT\$247.8 billion, accounting for 2.4% of the GDP: Based on this survey, the average expenditure for each person per trip was estimated at NT\$2,266 in 2004, a 6.4% rise from 2003. Of this expenditure, 27% was spent on Food and Beverages, and 22% on Lodging and Shopping. The total domestic travel expenses by all citizens in 2004 were estimated at NT\$247.8 billion, 13.6% more than 2003.

Average Expenses on Domestic Travel Per Person-Trip

Item	2004		2003	
	NT\$	Percentage	NT\$	Percentage
Transportation	502	22%	472	22%
Lodging	363	16%	369	17%
Food & Beverage	618	27%	506	24%
Entertainment	224	10%	150	7%
Shopping	493	22%	466	22%
Others	66	3%	166	8%
Average expenses Per Person-Trip	NT\$ 2,266		NT\$ 2,130	

Average Expenses on Domestic Travel Per Person-Trip in 2004

By With/Without Lodging

Item	Total		With Lodging Expenses		Without Lodging Expenses		Same-day Return	
	NT\$	%	NT\$	%	NT\$	%	NT\$	%
Transportation	502	22%	1,091	19%	366	25%	273	23%
Lodging	363	16%	1,933	33%	-	-	-	-
Food & Beverage	618	27%	1,436	25%	430	30%	360	30%
Entertainment	224	10%	500	9%	161	11%	135	11%
Shopping	493	22%	710	12%	443	30%	384	32%
Others	66	3%	114	2%	55	4%	41	4%
Total	NT\$ 2,266		NT\$ 5,784		NT\$ 1,454		NT\$ 1,193	

II. Comparisons of Domestic Travel and Outbound Travel

- 95% of outbound travelers also make domestic travel:** During the year 2004, 90% of all citizens made at least one domestic tourist trip (same as 2003), while 21% made at least one outbound tourist trip (6% more than 2003). On average, the number of domestic travel made per person was 5.7 (0.31 more than 2003), and the number of outbound travel made per person was 0.34 (0.08 more than 2003). Further analysis on mutual effect of domestic and outbound travels, shows that outbound travelers had a higher proportion of domestic travel (95%) than non-outbound traveler's (89%), indicating that outbound travelers enjoy traveling, and that most of them also made domestic travel.

Comparisons of Domestic Travel vs. Outbound Travel in 2004

Status of Travel	Domestic Travels					Outbound Travels				
	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	Whole Year	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	Whole Year
Did Not Travel	33.5%	38.9%	38.1%	43.0%	10.0%	93.0%	92.1%	92.1%	93.6%	79.2%
Did Travel	66.5%	61.1%	61.9%	57.0%	90.0%	7.0%	7.9%	7.9%	6.4%	20.8%
Average Number of Trips Per Person 12 years old or over	1.41	1.43	1.49	1.37	5.70	0.09	0.09	0.09	0.09	0.34
Total Number of Trips by All Citizens	26,952,000 Person-Trips (12 yrs or over)	27,390,000 Person-Trip (12 yrs or over)	28,614,000 Person-Trips (12 yrs or over)	26,382,000 Person-Trips (12 yrs or over)	109,338,000 Person-Trips (12 yrs or over)	1,751,245 Person-Trips	1,956,758 Person-Trips	2,242,358 Person-Trips	1,830,291 Person-Trips	7,780,652 Person-Trips
	32,072,880 Person-Trips	32,868,000 Person-Trips	35,481,360 Person-Trips	31,130,760 Person-Trips	131,553,000 Person-Trips					

Proportions of Domestic Travel in 2004

Outbound Travelers vs. Non-Outbound Travelers

Status	Total	Non-Outbound Travelers	Outbound Travelers

Total	100.0	100.0	100.0
Had Domestic Travel	90.0	88.7	95.0
No Domestic Travel	10.0	11.3	5.0

2. **Nearly 20% of all citizens made both domestic and outbound travel:** In 2004, 70% of all citizens had only domestic tourist travel without making any outbound trip, while 20% had both domestic and outbound travel. On the other hand, those who neither traveled domestically or outbound accounted for 9% of all citizens, while only 1% made outbound travel without traveling domestically.

Domestic Travel vs. Outbound Travel, 2004

Outbound Travel Domestic Travel	Total	No	Yes
	Total	100.0	79.2
Yes	90.0	70.2	19.8
No	10.0	9.0	1.1

3. **The male proportion, average age, and monthly income of male travelers of all domestic travelers was lower than outbound travelers:** In terms of the month of travel, more people travel domestically in June (12%) and February (11%) than any other month while more outbound trips were made in July (12%) and August (11%). Gender-wise, about the same number of male and females went on domestic travel, while male outbound travelers outnumbered female outbound travelers. Age-wise, the average age of domestic travelers (36 years old) is lower than outbound travelers (40 years old). As far as monthly income is concerned, the percentage of domestic travelers whose average monthly income exceeds NT\$ 40,000 (28%) is lower than that of outbound travelers (49%). As for occupation, a lot of domestic travelers were students (20%), while many of those who travel outbound are managers or supervisors (19%).

Characteristics Comparison between Domestic and Outbound Travelers, 2004

Characteristics	Domestic Traveler	Outbound Traveler
Month	More in June(11.7%), February(11.0%), August(10.0%)	More in July (10.7%) , August (9.7%) , June(9.3%)

Gender	Male female evenly divided	More male (58.1%)
Age	Average age : 36	Average age : 40
Monthly Income	27.8% with income higher than NT\$ 40,000	48.5% with income higher than NT\$ 40,000
Occupation	More in students(19.7%), service or sales workers(12.3%), housewives(11.3%),	More in Managers or supervisors(19.3%), service or sales workers(12.7%), people who retired(11.5%)

Note : The source of data on outbound travelers' traveling month, sex, and age was from government data.

- 4. The main purpose of both domestic and outbound trips was Sightseeing, Recreation, and Vacation:** The main purpose for people who went domestic traveling was “Sightseeing, Recreation, or Vacation” (60%), followed by “Physical Exercise Vacation” (12%) and “Visiting Friends or Relatives” (12%). Most outbound travelers also went outbound for “Sightseeing, Recreation or Vacation” purposes (54%), followed by business (24%) and “Visiting Friends or Relatives” (16%).

Comparison of Travel Purposes in 2004

Domestic vs. Outbound

Domestic Travels			Outbound Travels	
Purpose of the Trip		%	Purpose of the Trip	%
Total		100.0	Total	100.0
Sightseeing, Recreation, Vacation	Solely for Pleasure	60.3	Sightseeing, Recreation, Vacation	54.1
	Physical Exercising Vacation	12.1		
	Ecological Tour	3.9		
	Conference or Studying Tour	1.8		
	Religious Tour	3.4		
Business	1.1	Business	24.2	
Visiting Friends and Relatives	11.8	Visiting Friends and Relatives	16.4	
Short-term learning or study	-	Short-term learning or study	2.1	
Others	5.7	Others	3.2	

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5. Most travelers, domestic and outbound, made short distance trips: In 2004, 61% of domestic trips were made in the travelers' own living regions, while over 80% of outbound trips were made in nearby countries in Asia. In particular, more travelers visited Mainland China (34%) than any other country. Other popular visit areas include Japan (16%), USA (10%), and Thailand (9%).

Destinations of Outbound Travel in Year 2004

Region	Destination	Region (%)	Destination (%)
Total		104.7	115.4
China-Hong Macao	Hong Kong	37.4	4.8
	Macao		2.1
	Mainland China		33.6
Southeast Asia	Philippines	23.4	1.4
	Indonesia		4.1
	Malaysia		2.9
	Singapore		2.9
	Thailand		8.9
	Vietnam		3.6
	Cambodia		0.5
Northeast Asia	Japan	19.2	15.5
	Korea		3.7
America	U.S.A	10.8	9.8
	Canada		3.4
Europe	Hungary	7.3	0.8
	Czech		0.3
	U.K.		1.3
	France		0.8
	Netherlands		0.4
	Belgium		0.2

	Luxembourg		1.3
	Germany		1.3
	Switzerland		0.9
	Austria		0.4
	Spain		0.4
	Portugal		1.0
	Italy		0.5
	Greece		0.2
	Sweden		0.5
	Norway		0.1
	Finland		0.1
	Denmark		0.4
	Iceland		0.1
Oceania	Australia		1.5
	New Zealand	3.2	0.9
	Palau		0.9
Africa	South Africa		0.1
	Kenya	0.6	0.5
Others		2.9	3.3

Note : traveling regions were multi-choice

6. Residents of the Northern Region are the main source for both domestic and outbound travel market: In analyzing the regions of residence, it was found that more domestic trips were made by residents of the Northern Region (45%) than any other region, followed by the Southern Region (28%) and the Central Region (25%). On the other hand, 60% of all outbound trips were also made by residents of the Northern Region, followed by the Southern Region (22%). The figures obviously show that residents of the Northern Region are the main source of both domestic and outbound travel market.

Distribution of Domestic and Outbound Trips, 2004

By Region of Residence

Region of Residence	Domestic Trips (%)	Outbound Trips (%)
Total	100.0	100.0
North Region	44.9	59.5
Central Region	25.1	16.0
South Region	27.7	21.9
East Region	2.2	1.6
Kim-Mar Region	0.1	1.0

7. Both domestic and outbound travelers tend to take Individual Tours: More people chose to make both domestic and outbound trips (respectively 87% and 69%) by themselves rather than joining group tours. Only 5% of all domestic tourist travel was arranged by travel agencies, while 84% of outbound tours were arranged through travel agencies.

Comparison of Types of Domestic and Outbound Travels, 2004

Item		Domestic Trips	Outbound Trips
Type of Tour	Individual Tour	87.3%	69.4%
	Group Tour	12.7%	30.6%
Arrangement	By Travel Agency	5.1%	84.3%
	Not by Travel Agency	93.%	15.7%
	Non response	1.6%	-

8. Expenses on outbound travel exceed those on domestic travel: The average spending per day for domestic travel (overnight tours) was NT\$ 3,684, which was lower than that of the outbound travel (NT\$ 3,839). The average spending per domestic person-trip (overnight) was NT\$ 5,784, which was also lower than NT\$ 41,920. Even though the number of domestic trips (131,553,000 person-trips, including children under 12) exceeded outbound travel (7,780,652 person-trips), the total expenses on domestic travel (NT\$ 247.8 billion) were still lower than those on outbound travel (NT\$ 326.2 billion).

Expenses of Domestic and Outbound Travels, 2004

Expense	Domestic	Outbound Trips
Average Spending Per Day Trip	NT\$ 3,684 (+18.7%) (stayed out one night or more)	NT\$ 3,839 (-7.4%)
Average Spending Per Person-Trip	NT\$ 5,784 (+16.5%) (stayed out one night or more)	NT\$ 41,920 (-11.5%)
Total Travel Expenditure by All Citizens	NT\$ 2,478 billions (+13.6%) Equivalent to US\$ 7,377millions (+17.0%)	NT\$ 3,262 billions (+16.3%) Equivalent to US\$ 9,712 millions (+19.8%)

Note : 1.The numbers in parentheses indicate percent increases in 2003.

2.Domestic travelers refer to travelers who stayed overnight and paid accommodation fees.

9. In most people’s opinion, “Food” is Taiwan’s strong suit in the face of international competition: 61% of outbound travelers believed that Taiwanese cuisine is more delicious than those of their visiting destinations. Compared with outbound visit destinations, it was generally believed that Taiwan outshone other destinations with its “Food”, had more beautiful “Natural Scenery” than Southeast Asia, preserved more the historical relics and antiques than New Zealand and Australia, enjoyed lower “Consumer Goods Prices” than North-East Asia, America and Canada, New Zealand, Australia, and Europe. Taiwan also outdid Mainland China, Hong Kong, Macao, Southeast Asia, and Africa in the aspect of physical facilities (for example, “Traffic Direction Signs,” “Transportation,” “Amusement and Recreational Facilities,” “Traveling Information Services,” and “Environment Cleaning and Beautification”). In addition, Taiwan outperformed Africa, Mainland China, Hong Kong, Macao and Southeast Asia in light of public security.

Comparison of Outbound Visit Destinations and Taiwan

Proportion of Taiwan being better or much better

Natural Scenery	History and	Consumer	Food	Direction Signs	Transportation	Amusement and	Traveling Information
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	Culture	Goods Prices				Recreational Facilities	Services
25%	27%	67%	58%	21%	21%	21%	21%
47%	36%	28%	64%	46%	58%	47%	48%
39%	25%	23%	56%	56%	61%	45%	58%
19%	35%	57%	66%	25%	41%	16%	19%
25%	60%	59%	74%	29%	50%	44%	30%
16%	13%	66%	75%	28%	31%	20%	21%
25%	32%	15%	52%	84%	84%	82%	84%
40%	63%	44%	76%	60%	66%	68%	52%
35%	30%	40%	61%	42%	49%	37%	42%

Note: Consumer Goods Prices means the prices of commodities in Taiwan were lower (including Much Lower and Slightly Lower).

10. Tamshui (for domestic travel) and Mainland China and Japan (for outbound travel) were the main tourist spots that travelers planned to visit: As far as the visit destinations in the next season during the year 2004 were concerned, the highest proportion is for domestic travel in Q1 2005 with a staggering 43%. The four seasons see a rather great variation in visit destinations. Among them, Tamshui is listed within the top 10 destinations and shows more attraction to tourists. In terms of outbound tours, more people in Q2 planned to go outbound in Q3 (9%). (Mainland China and Japan were the two most desired destinations for tourist visits.)

Plans for Traveler Visits in Respective Seasons of 2004

Seasons		2004	2004	2004	2005
Travel Plan		2 nd Quarter	3 rd Quarter	4 th Quarter	1 st Quarter
planned domestic Travel in specific Quarter	Yes	33.1	38.1	27.3	43.0
	No	66.9	61.9	72.7	57.0
planned outbound Travel in specific Quarter	Yes	6.3	9.4	6.1	5.3
	No	93.7	90.6	93.9	94.7

Planned Domestic Tourist Destinations for the Next Season in Respective Seasons 2004

Planned Domestic Tourist Destinations for 2004,Q2	(%)	Planned Domestic Tourist Destinations for 2004,Q3	(%)
Tamshui	5.7	Dongshan River Scenic Area	7.6
Tsing Ching Farm	2.4	Yamay Resort	4.7
Nanjhuang	1.9	National Museum of Marine Biology & Aquarium	4.0
Yanmingshan National Park	1.8	Hualien Ocean Park	3.4
East Coast National Scenic Areas	1.8	Tamshui	2.4
Dongshan River Scenic Area	1.8	Siaowan Coast Reereation Area	2.4
Green Island	1.7	Sitou Forest Recreation Area	2.1
Jiaosi	1.6	Jihben Hot Springs Scenic Area	1.9
Sitou Forest Recreation Area	1.6	JanFuSun Theme Park	1.6
Hualien Ocean Park	1.5	Nanwam Coastal Recreation Area	1.5

Planned Domestic Tourist Destinations for 2004,Q4	(%)	Planned Domestic Tourist Destinations for 2005,Q1	(%)
Tamshui	3.5	Tsing Ching Farm	2.4
JanFuSun Theme Park	2.7	Tamshui	2.2
National Museum of Marine Biology & Aquarium	2.5	Sitou Forest Recreation Area	1.7
Sun Moon Lake	2.1	Alishan National Forest Recreation Area	1.6
Business District of East Taipei City	1.9	Business District of Kaohsiung City	1.6
Hualien Ocean Park	1.9	JanFuSun Theme Park	1.6
Wulai	1.8	Gukeng, Huadshan	1.6
Gukeng, Huadshan	1.8	National Museum of Marine Biology & Aquarium	1.5
Jiaosi	1.8	Formosa Aboriginal Culture Village	1.4
Jiufen	1.7	Fort Zeelandia / Anping Fort	1.4

Planned Outbound Traveling Area for the Next Season in Respective Seasons of 2004

Planned Outbound Areas for 2004,Q2	(%)	Planned Outbound Areas for 2004,Q3	(%)
Mainland China	28.4	Mainland China	35.6
Japan	22.4	Japan	20.2
Korea	10.1	Thailand	10.6
U.S.A	9.4	U.S.A	9.0
Thailand	7.9	Indonesia	5.7
Indonesia	6.9	Korea	5.4
Hong Kong	4.6	Hong Kong	4.5
Australia	3.4	Canada	3.1
Vietnam	3.4	Malaysia	2.4
Canada	3.0	Czech	2.1
Planned Outbound Areas for 2004,Q4	(%)	Planned Outbound Areas for 2005,Q1	(%)
Mainland China	28.3	Mainland China	34.6
Japan	24.9	Japan	24.3
Korea	8.6	U.S.A	11.9
Indonesia	7.9	Korea	10.1
Thailand	7.7	Thailand	8.0
Hong Kong	7.7	Hong Kong	7.5
U.S.A	7.4	Singapore	4.2
Malaysia	3.1	Australia	3.2
Luxembourg	3.0	Indonesia	3.0
U.K.	2.8	Malaysia	1.9

III. Factors Underlying Choices for Domestic and Outbound Travel

1. **In the face of “Three Day Holidays and NT\$ 10,000” and “Sufficient Budget but No Consecutive Holidays,” more than half of the target population intended to go for domestic travel:** People with three day holidays and NT\$ 10,000 mostly tended to go traveling within the nation, followed by waiting until the budget becomes sufficient for outbound travel (21%), and traveling to nearby Asian countries (11%). When the budget was ready but no consecutive holidays were available, 55% of people would choose to visit domestic travel destinations, which was higher than the proportion of taking days off for traveling outbound (31%).

With Three Day Holidays and NT\$ 10,000 for Domestic or Outbound Travel

Unit:%

Item	2004	2004
	2 nd Quarter	4 th Quarter
Domestic Travel	51.4	51.8
Traveling to Nearby Asian Countries	11.8	9.8
Lending Money, and Traveling to Faraway Countries	0.7	0.7
Waiting until the budget becomes sufficient for outbound travel	20.9	21.3
Not Sure	9.3	10.6
Non response	5.9	5.8

Note : This question was asked in Q2 and Q4.

With Sufficient Budget but No Consecutive Holiday for Domestic or Outbound Travel

Unit:%

Item	2004	2004
	2 nd Quarter	4 th Quarter
Domestic Travel	53.6	56.4
Asking for leave to travel outbound	33.8	29.0
Non Response	12.6	14.6

Note : This question was asked in Q2 and Q4.

- 2. People with over NT\$ 42,000 free budget and 7.2 days holiday would intend to make domestic trips:** When asked with how many holidays and free budget available would people begin to consider traveling abroad, most people went for 5-7 days of holidays (approximately 74%) and over NT\$ 50,000 free budget (approximately 40%). On average, it would take NT\$ 42,000 free budget and 7.2 days holiday for people to consider traveling abroad to nearby Asian countries.

Free Budget Amount for Considering Outbound Traveling to Nearby Asian Countries

Unit:%

Budget	2004	2004
	2 nd Quarter	4 th Quarter
Total	100.0	100.0
Under 10 Thousands	0.9	0.7
10 Thousands ~ Under 20 Thousands	8.2	9.7
20 Thousands ~ Under 30 Thousands	20.0	20.4
30 Thousands ~ Under 40 Thousands	16.3	14.9
40 Thousands ~ Under 50 Thousands	16.1	14.4
50 Thousands ~ Under 60 Thousands	19.5	18.9
60 Thousands and Over	19.0	20.9

Note : 1.This question was asked in Q2 and Q4.

2.Those who did not intend to visit any Asian country and refused to answer this question have been taken out from the calculation.

Number of Consecutive Holidays for Considering Outbound Traveling to Nearby

Asian Countries

Number of Consecutive Holidays	2004		2004	
	2 nd Quarter		4 th Quarter	
	Percentage	Excluding the Percentage of Not Wanting	Percentage	Excluding the Percentage of Not Wanting

		to Go to Asia Countries and Non Response		to Go to Asia Countries and Non Response
Total	100.0	100.0	100.0	100.0
1 Day ~ 4 Days	6.8	8.6	4.9	6.3
5 Days ~ 7 Days	58.0	73.3	58.4	75.0
8 Days ~ 10 Days	7.5	9.5	7.6	9.8
11 Days ~ 14 Days	3.1	4.0	3.4	4.3
15 Days ~ 18 Days	0.9	1.2	0.7	1.0
19 Days ~ 21 Days	0.4	0.5	0.3	0.3
22 Days ~ 24 Days	0.2	0.3	0.0	0.0
25 Days ~ 28 Days	0.6	0.7	0.3	0.3
29 Days and over	1.5	1.9	2.2	2.9
Do Not Want to Go	15.7	-	18.0	-
Non Response	5.3	-	4.1	-

Note : This question was asked in Q2 and Q4.

3. Intention for outbound travel was in direct proportion to personal income: Considering current personal financial ability, 46% of people intend to visit domestic tourist destinations, while 36% prefer traveling abroad. As far as personal monthly income was concerned, intention for outbound travel was in direct proportion to income amount. Among those who intended to visit domestic tourist destinations, the largest proportion fell on Eastern Region (Hualien, Taitung), followed by Southern Region (Chiayi, Tainan, Kaohsiung, Pingtung). Among those who intended to travel abroad, Japan was the No. 1 choice, followed by America, Mainland China, and France.

Preferred Travel Types considering Current Financial Ability

Unit:Row%

Monthly Income	Domestic Travel	Outbound Travel	Neither	Can Not Afford	Non Response
Total	45.8	36.2	10.7	5.9	1.4
No Regularly Income	48.3	25.3	14.7	10.2	1.5
Under 20 Thousands	50.7	24.7	13.8	9.4	1.4
20 Thousands ~ Under 30 Thousands	48.9	39.4	7.9	2.9	0.9
30 Thousands ~ Under 40 Thousands	46.4	45.4	5.5	1.7	1.0
40 Thousands ~ Under 50 Thousands	39.9	51.9	6.0	1.1	1.1
50 Thousands ~ Under 70 Thousands	37.4	55.6	4.9	1.0	1.1
70 Thousands ~ Under 100 Thousands	35.5	55.6	5.2	2.3	1.4
100 Thousands and Over	32.8	53.4	11.4	1.7	0.7

Preferred Domestic Tourist Destinations considering Current Financial Ability

Unit:%

Region	2004	2004
	2 nd Quarter	4 th Quarter
North Region	15.1	16.5
Central Region	10.6	11.6
South Region	21.4	23.8

East Region		34.3	33.6
Off-shore Region	Island	18.6	14.5

Note : This question was asked in Q2 and Q4.

Top 10 Outbound Traveling Areas considering Current Financial Ability

Unit:%

Country/Area	2004 2 nd Quarter	Country/Area	2004 4 th Quarter
Japan	46.6	Japan	49.9
U.S.A.	13.9	Mainland China	16.4
Mainland China	12.2	U.S.A.	15.1
France	10.6	France	11.1
Thailand	9.9	Korea	8.8
Canada	9.8	Australia	7.3
Indonesia	7.7	U.K.	6.8
Australia	7.5	Canada	6.2
Italy	7.2	Italy	5.2
Korea	7.3	France	5.0

Note : This question was asked in Q2 and Q4.

- 4. Expense was the most important factor considered by tourists for outbound travels:** The most important factor considered in going outbound was “Expense,” followed by “Time,” “Companion” and “Destination.”

Factors Considered by Outbound Travelers (degree of importance)

Unit:degree of important

Item	2004	2004
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	2 nd Quarter	4 th Quarter
Total	100.0	100.0
Expense	36.9	35.0
Time	25.1	25.7
Companion	21.7	23.5
Destination	16.3	15.8

Note : This question was asked in Q2 and Q4.

Table of R.O.C. Citizens' Domestic Travel Index

Item	2003	2004	Change
Proportion of People Taking Domestic Travel	90.1%	90.0%	decrease 0.1%
Average Number of Trips Per Person	5.39 trips	5.70 trips	increase 0.31 trips
Total Number of Trips by All Citizens	102,399,000 trips	109,338,000 trips	growth rate 6.8%
Average Number of Places Visited per Trip	1.71 places	1.46 places	decrease 0.25 place
Average Number of Days per Trip	1.7 days	1.7 days	no significant change
Percentage of Trips Taken During Holidays and Weekends	74.1%	67.5%	decrease 6.6%
Over All Degree of Satisfaction	95.7%	94.1%	decrease 1.6%
Average Expense Per Person Trip	NT\$ 2,130 (US\$ 61.58)	NT\$ 2,266 (US\$ 67.47)	NT\$:growth rate 6.4% (US\$:growth rate 9.6%)
Total Expenditure of Domestic Travels by All Citizens	NT\$ 218.1 billions (US\$ 6.305 billions)	NT\$ 247.8 billions (US\$ 7.377 billions)	NT\$:growth rate 13.6% (US\$:growth rate 17.0%)

Note: The target population of this survey was all R.O.C. citizens aged 12 or above.

Table of R.O.C. Citizens' Outbound Travel Index

Item	2003	2004	Change
Proportion of People Taking outbound Travel	15.2%	20.8%	increase 5.6%
Total Number of Trips by All Citizens (note 1)	5,923,072 trips	7,780,652 trips	growth rate 31.4%
Average Number of Trips Per Person (note 2)	0.26 trips	0.34 trips	increase 0.08 trips
Average Number of Nights Per Trip (note 3)	10.97 nights	10.57 nights	increase 0.4 nights
Average Expense Per Person Trip	NT\$ 47,364 (US\$ 1,369)	NT\$ 41,920 (US\$ 1,248)	NT\$:growth rate -11.5% (US\$:growth rate -8.8%)
Total Expenditure of Outbound Travels by All Citizens	NT\$ 280.5 billions (US\$ 8.11billions)	NT\$ 326.2 billions (US\$ 9.712billions)	NT\$:growth rate 16.3% (US\$:growth rate 19.8%)

Note:1.Data source:"monthly Statistics on Tourism" from Tourism Bureau, Ministry of Transportation and Communications

2.Average number of outbound trips per person = Total number of outbound trips ÷ Total population in Taiwan-Fujian Area. (The average population in 2004 was 22,645,343.)

3.Average Number of Nights Per Trip is the average number of nights per trip obtained by using data of outbound travel with 60 overnights or under as the denominator.