

# **2003 Survey of Travel by R.O.C Citizens**

## **Executive Summary**

The objectives of this study are to understand, in 2003, citizens' traveling activities, degree of satisfaction and amounts spent on different types of vacation expenses on each trip; and to learn the mutual effects of domestic tourism and outbound travels. It also provides estimates on domestic tourism expenditures and foreign exchange spent on overseas travels. The results of this study provide policy makers needed information on developing new tourist facilities, improving traveling environments, upgrading the quality of tourism and initiating new tourism policies. The population of this survey includes all R.O.C. citizens whose age was 12 years or older in 2003. The survey period covered from January 1, 2003 through December 31, 2003.

This survey was designed primarily to collect domestic tourism data. However, outbound traveling data was also collected as a secondary objective. The survey interviews were conducted by telephone, using a computer-assisted telephone interviewing system (CATI). A stratified random sampling was used to select the sample. The total initial sample was divided into four panels; and a rotation scheme was instituted so that each sample person was interviewed once every quarter for four consecutive quarters. However, sample of each quarter composed of four panels that first panel was interviewed the first time; second panel was interviewed the second time; third panel was interviewed the third time; and the fourth panel was interviewed the fourth time. The number of completed domestic tourism interviews were as follows: first quarter 4,913 persons, second quarter 4,604 persons, third quarter 4,687 persons and fourth quarter 4,603 persons. The completed outbound interviews were fewer: first quarter 381 persons, second quarter 160 persons, third quarters 595 persons and fourth quarter 404 persons.

The survey results are summarized in the following two parts: statistical analysis and important indexes of domestic and outbound travels.

## I. Statistical Analysis

### A. Domestic Travels

1. Nine out of ten citizens had domestic travels, no significant difference from that of 2002: During the year of 2003, 90% of the citizens 12 years or older traveled at least once domestically, which was not significantly different from 2002. Of the four quarters in 2003, the proportion of people who traveled was equal to or higher than that of 2002, except the second quarter, which was significant lower than the same quarter of 2002 due to the effects of SARS.

**Proportions of People Having Domestic Travels**

Year	Proportion of People Traveled ( % )				
	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter	Whole Year
2003	68.2	51.7	61.6	60.1	90.1
2002	65.4	60.1	61.4	56.6	89.7

2. The estimated total number of domestic tourist trips taken by citizens of 12 years or older reached one hundred and two millions, a decrease of 4% from the previous year: The average number of trips during the year 2003 was 5.39, which was lower than 5.62 in 2002. The estimated total number of domestic tourist trips taken by citizens of 12 years or older was 102,399,000 trips, a decrease of 4% from that of 2002. And the total number of trips traveled by all citizens was estimated at 127,417,000 person-trips.

**Average number of People Having Domestic Travels**

Year	Average number of trips per person				Average number of trips per person in whole year
	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter	
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 still the main reason for people not having domestic travel, but a decrease of 3% from the previous year: During the year of 2003, one out of ten people did not take any domestic tourist travel. Among the non-travelers, age-wise, there were more 60 years or older (44%) than other ages; and occupation-wise, housewives (20%) or retirees (24%) accounted more. And the leading reason for not traveling was “Did not have time”(40%); and the second major reasons were “Not interested in traveling”(20%) and “Poor health”(20%), while “Could not afford”(12%), was ranked third.

**Reasons for not traveling**

Unit: %

Item	2003	2002
Did not have time	39.9	43.0
Not interested	20.4	21.1
Poor health	20.3	12.1
Could not afford	11.9	15.8
Outbound travel	1.2	2.0
Did not know good tourist places	1.5	0.9
Transportation problem	1.3	0.6
Could not find companions	0.7	1.8
Poor weather	0.5	0.6
Too crowded in tourist place	0.4	0.2
Other reasons	1.8	2.0
Total	100.0	100.0

4. Domestic tourist trips made on weekends increased: 61% of the domestic tourist trips were taken on weekends, an increase of 3% over 2002; while 26% of the trips were taken on weekdays. The main purpose of domestic tourist travels was sightseeing, recreation, vacation

(61%), followed by visiting friends and relatives (19%), physical exercising (8%), religious travels (5%), and ecological tours (3%).

## Day Used For Domestic Tourist Travel

%

Unit:

Day of Travel		2003	2002
Total		100.0	100.0
Weekends		60.9	57.5
National Holidays		13.2	15.7
Weekdays	Annual Leaves	7.2	5.4
	Summer or Winter Breaks	3.5	3.7
	Other weekdays	15.2	17.7

# Purposes of Domestic Tourist Travels

Unit: %

Purpose of the Trip	2003	2002
Total	100.0	100.0
Sightseeing, Recreation, Vacation	61.4	60.5
Visiting friends and relatives	19.3	18.7
Business	1.0	1.5
Ecological tours	2.9	5.9
Religious travels	5.3	6.0
Physical exercising vacations	7.5	4.0
Conference or Studying Tour	1.0	1.3
Others	1.7	2.1

5. Most of the trips were short distances, over six-tenth were one-day round trips: For the year 2003, about 65% of the trips were within the same region; especially in the south region, 74% of the trips were traveled within the south region. As for duration of the trips, most of them (64%) were same-day returns. Average duration of each trip was 1.7 days (about the same as in 2002).

2003 Proportion of Tourists Visited Each Region

Unit: row %

Region Visited	Residence				
	North Region	Central Region	South Region	East Region	Kim-Mar Region
North Region	67.4	23.4	16.1	8.7	0.5

Central Region	22.0	65.0	22.8	5.7	0.3
South Region	14.4	18.0	73.7	8.6	0.4
East Region	29.2	13.5	24.9	57.8	0.0
Kim-Mar Region	58.2	15.5	4.2	6.9	39.5

Note: this item was multi-choice.

## Distribution on Duration of Tourist Trips

Unit: %

Number of Days Traveled	2003	2002
1 Day	63.8	62.8
2 Days	22.4	22.5
3 Days	9.4	9.7
4 or more days	4.5	5.0

6. Over-night tourists mostly stayed in hotels or relatives and friends' places, but an increasing number of people stayed in Bed and Breakfast accommodation: According to the survey, in domestic trips, 64% of them were same-day returns, 18% staying in hotels and 13% staying in relatives and friends' places; and an increasing number of people stayed in Bed and Breakfast, 2.4% in 2003 over 1.8% in 2002.
7. Nine-tenth of the tourist trips were completely planned by tourists themselves; the use of internet for the advanced travel information increased yearly: Majority of the tourists planned their trips completely by themselves (90%) while other types of planning were each used by less than 5% of the tourists. Beside, there were only 4% of the trips arranged by travel agencies. Before the trips, 49% of the tourists did not obtain travel information. As for people obtaining travel information before their trips, 54% of them obtained it from friends, relatives or colleagues. 16% of people obtaining information through Internet, an increase of 4% over that of 2002. In addition, 4% of tourists had purchased traveling related products through Internet.

#### Sources of Travel Information

Unit: %

Information Sources		2003	2002
Friends, Relatives Colleagues, Classmates		53.6	55.7
Internet		16.4	12.6
Television		14.1	14.6
Reading Media	Newspapers	11.2	12.5
	Travel Books	8.1	8.2
	Magazines	6.1	7.0
Tourism Bureau or Agencies		4.0	3.5
Travel Agencies		3.0	3.1

Outdoor Bulletin	1.2	1.4
Radio	1.2	1.1
Tourism Shows or Exhibits	0.7	0.6
Others	2.5	3.7

Note: excluding tourists who did not obtain travel information



8. “Natural scenery sightseeing” was still the most popular activity enjoyed by the majority of the tourists; especially for East Region visitors: The most important factors considered by the tourists when they chose visiting places were “beautiful natural scenery” (21%), followed by “visiting friends or relatives” (18%). Other important factors considered were “Having theme activities” (12%), “Distance” (10%), etc. The activity that most tourists (62%) enjoyed was “natural scenery sightseeing”; in particular, 90% of the East Region visitors enjoyed the natural scenery. In addition, each region showed its own specialties : tourists enjoyed shopping and good foods in the North, cultural experiencing activities in both Central and South regions, and amusement park activities in the Central, and swimming and diving in the South, and hot-spring and SPA in the East.
9. Tamshui, National Museum of Marine Biology & Aquarium, and Jihben Hot Springs Scenic Area were the most visited domestic tourist resorts: North Region was visited by the largest number of tourists, accounted for 40%; followed in its orders were South Region (34%), Central Region (32%), East Region (9%), and King-Mar Region (0.5%). As for places visited by tourists, Tamshui, National Museum of Marine Biology & Aquarium, and Jihben Hot Springs Scenic Area were the three places with largest number of tourists. The average number of places visited on each trip was 1.71.

#### Ten Most Visited Resorts in 2003

Tourist places	Percentage
Tamshui	6.41
National Museum of Marine Biology & Aquarium	2.08
Jihben Hot Springs Scenic Area	1.96
Chichi (Chichi train station)	1.78
Sun Moon Lake Scenic Area	1.71
Shilin Night Market	1.65
Chingjing Veterans Farm	1.62
Hualien Ocean Park	1.56
Pu-Li	1.56
Alishan Forest Recreation Area	1.52

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Note: the percentage=the person-trips to a tourist place/ total person-trips in 2003

10. Private automobile was the main transportation for most tourists to National Parks, Scenic Areas, and the 13 planned Travel Routes; most trips were taken on weekends: Majority of tourists drove their own cars to visit National Parks and Natural Scenic Areas. However, for tourists visiting Kinmen National Park 78% took airplanes; for tourists visiting Penghu National Scenic Area, 72% used airplanes, followed by boats (50%). 54% of tourists visited Taroko National Park on weekdays; while tourists visited Kinmen National Park, East Coast Scenic Area, Penghu National Scenic Area, East Rift Valley National Scenic Area were divided evenly between weekdays and weekends. As for lodging, visiting Kenting National Park, Taroko National Park, Kinmen national Park, East Coast, Penghu, East Rift Valley, Hengchun Peninsula Route, Hualien-Taitung Route and Central Mountains Range, the proportions of tourists staying in hotels were 49%, 68%, 58%, 68%, 56%, 58%, 47%, 63% and 53% respectively. On the trip arrangement, 51% of trips to Kinmen National Park and 30% of trips to Penghu National Park were arranged by travel agencies, while most of trips to other places were planned by tourists themselves.

#### 2003 Proportion of Tourists Visiting National park and National Scenic Area

Unit : %

National Park	Percentage	National Scenic Area	Percentage	National Scenic Area	Percentage
Kenting National Park	6.01	Tri-Mountain	3.72	Alishan	1.97
Yanmingshan National Park	4.22	North Coast & Guanyinshan	2.95	Yunlin-Chiai-Tainnan	1.93
Taroko National Park	2.43	Sun Moon Lake	2.93	Northeast Coast	1.22
Shei-Pa National Park	0.77	East Coast	2.57	Penghu	0.58
Kinmen National Park	0.44	Maoling	2.47	Tapeng Bay	0.45
Yushan National Park	0.19	East Rift Valley	2.32	Matzu	0.09

Note: the percentage=the person-trips to one place of the National Park or the National Scenic Area / total person-trips in 2003

## 2003 Proportion of Tourists Visiting the 13 planed-Travel Routes

unit : %

Travel Route	Percentage	Travel route	Percentage
North Coast Route	10.47	Yunlin-Chiai-Tainan Coast	4.26
Taoyuan-Hsinchu-Miaoli	8.56	Kaohsiung-Pingtung Foothills	2.33
Nan-Yang & North Corss-Island Highway Route	8.02	Alishan Route	1.97
Central Mountains Range	7.55	Penghu Offshore Island	0.58
Hengchun Peninsula Route	6.54	Kinmen Offshore Island	0.44
Hualien-Taitung Route	6.19	Matzu Offshore Island	0.09
Sun Moon Lake Route	5.22		

Note: the percentage=the person-trips to one place of the planed-Travel Line/ total person-trips in 2003

11. 96% of all tourists were satisfied with the overall impressions of the places visited: The survey indicates that tourists were most satisfied with “the natural scenery and natural resources protection”, “attendants services in the places they visited” and “travel safety”, The proportion of satisfied tourists on all there items reached 90% or above. However, about 22% to 27% of the tourists were dissatisfied with “traffic jams”, “entrance ticket prices”, “public transportation connected with outside”, “parking facilities”, and “cleanness and convenience of lavatories”. Fast improvements on these are still needed.

### Tourists Degree of Satisfaction With Places Visited in 2003

Unit: %

Items	Satisfied	Dissatisfied	No opinion
Natural Scenery and natural resources protection	91.1	8.2	0.8

Attendants Services	90.6	5.5	3.9
Travel Safety	90.0	8.4	1.6
Ground maintenance	87.0	12.3	0.7
Food facilities	82.5	14.5	3.1
Signs and directions	80.5	15.0	4.6
Amusement facilities	79.8	11.5	8.7
Lodging facilities	79.5	11.0	9.5
Lavatories	75.0	22.2	2.9
Parking facilities	73.3	20.9	5.8
Levitation of traffic jams	69.3	26.6	4.1
Public transportation	66.0	22.5	11.6
Entrance ticket prices	66.0	25.3	8.7
Overall satisfaction	95.7	3.9	0.4

12. The R.O.C. citizens' total domestic tourist traveling expenditure in 2003 was NT\$ 218.1 billions, accounted for 2.2% on GDP: Based on this survey, the average expenditure for each person per trip was estimated at NT\$ 2,130; food, transportation, and shopping expenditure were accounted for most of the expenses, followed by lodging. The total domestic tourist travel expenses by all citizens in 2003 were estimated at NT\$218.1 billions, an 8% decrease from that of 2002.

#### Average Expenses of Domestic Tourist Travel Per Person-Trip

Unit:

NT\$

Item	2003		2002	
	Value	Percentage	Value	Percentage
Transportation	472	(22%)	545	(24%)
Lodging	369	(17%)	401	(18%)
Food and Beverage	506	(24%)	560	(25%)
Entertainment	150	(7%)	155	(7%)
Shopping	466	(22%)	477	(21%)
Others	166	(8%)	90	(4%)
Average expenses Per Person-Trip	2,130		2,228	

#### Average Expenses of Domestic Tourist Travel Per Person-Trip in 2003

##### By With/Without Lodging

Unit: NT\$

Item	Total	With lodging expenses	Without lodging expenses	Same-day return
Total	2,130	4,963	1,377	1,026
Transportation	472	911	356	248
Lodging	369	1,759	0	2

Food and Beverage	506	1,040	364	295
Entertainment	150	299	111	89
Shopping	466	807	376	293
Others	166	148	171	99

## B. Comparisons of Domestic Travels and Outbound Travels

- 1. Outbound traveler's desire for domestic travel was very high:** During 2003, 90% of all citizens took at least one domestic tourist trip; while 15% had at least one outbound travel. The second quarter domestic travel rate was down to 52% because of SARS. (the second quarter of 2002, domestic travel rate was 60%. All other three quarters of 2003, all of the domestic travels rates had at least 60%), and the outbound travel rate down to 3%(compared with 7% in second quarter of 2002 and 6% in all other quarters of 2003). Further analysis on mutual effect of domestic and outbound travels, we found that outbound travelers had a higher proportion of domestic travels than non-outbound travelers', 94% vs. 89%. And the outbound travel rate of domestic tourists also were higher than non-domestic tourists', 16% vs. 9%. These indicate that outbound travelers were a group of people who like to travel; most of them also took domestic tourist travels.

### Comparison of Domestic Travel vs. Outbound Travel in 2003

Status of Travel	Domestic Tourist Travels					Outbound Travels				
	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter	Whole Year	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter	Whole Year
Did not Travel	31.8%	48.3%	38.4%	39.9%	9.9%	93.0%	96.8%	92.3%	94.0%	84.8%
Did Travel	68.2%	51.7%	61.6%	60.1%	90.1%	7.0%	3.2%	7.7%	6.0%	15.2%
Average number of Trips Per Person 12 yrs or old	1.51	1.15	1.34	1.39	5.39	0.08	0.04	0.09	0.07	0.26
Total number of Trips by All Citizens	28,594,000 person-trips  (12 yrs or older)  35,171,000 person-trips	21,818,000 person-trips  (12 yrs or older)  27,273,000 person-trips	25,481,000 person-trips  (12 yrs or older)  32,106,000 person-trips	26,506,000 person-trips  (12 yrs or older)  32,867,000 person-trips	102,399,000 person-trips  (12 yrs or older)  127,417,000 person-trips	1,633,107 person-trips	595,608 person-trips	1,997,823 person-trips	1,696,534 person-trips	5,923,072 person-trips

### Proportions of Domestic Tourist Travel in 2003

#### Outbound Travelers vs. Non-outbound Travelers

Status	Outbound Travelers (15.2%)	Non-outbound Travelers (84.8%)



Had Domestic Travel	94.3%	89.4%
No Domestic Travel	5.7%	10.6%
Total	100.0%	100.0%

2. **14% of all citizens had both domestic and outbound travels:** In 2003, 76% of all citizens had only domestic tourist travels without oversea tour; 14% had both domestic and outbound travels; 9% had neither domestic nor outbound travel; only 1% had outbound travels without any domestic tourist travel.

#### Domestic Tourist Travel vs. Outbound Travel in 2003

Outbound Travel	No	Yes	Total
Domestic Travel			
No	9.0%	0.9%	9.9%
Yes	75.8%	14.3%	90.1%
Total	84.8%	15.2%	100.0%

3. **Bound travelers' male proportion, age and monthly income were on the average higher than domestic tourist travelers:** Comparisons between months, we found that more tourists took domestic travels in February than in any other month, accounted for 15%; while more outbound travels were taken in August (12%) or July (11%). Gender-wise, domestic travelers were evenly divided between males and females; male outbound travelers out numbered females; Age-wise, average age of domestic travelers was younger than that of outbound travelers, 37 vs. 40. Based on monthly income, percentage of the domestic travelers with monthly income NT\$40,000 or over was less than that of the outbound travelers, 19% vs. 45%. As for occupation, student (20%) was the largest group among domestic tourists, while outbound travelers had more managers and supervisors (17%) or service workers and shop and market sales workers (16%) than any other occupation.

#### Characteristics Comparison Between Domestic Tourists and Outbound Travelers in 2003

Characteristics	Domestic Tourist	Outbound Traveler
Month	more in February (15.2%)	more in August (12.1%), July (11.4%), October (11.0%), February (10.5%), September (10.2%)
Gender	Male female evenly divided	More males (59.1%)

Age	Average Age : 37	Average Age : 40
Monthly Income	18.7% with income higher than NT\$40,000	45.4% with income higher than NT\$40,000
Occupation	More in Students (19.6%) Services or sales workers (15.8%) Housewives (13.4%)	More in Managers or Supervisors (16.9%) Services or sales workers (15.8%)

Note: These data of outbound tourist's traveling month, sex, and age were government statistical datum.

4. **61% of domestic tourist trips and 49% of outbound travel trips were for Sightseeing, Recreation or Vacation purpose:** Most tourists took domestic travel for Sightseeing, Recreation or Vacation purpose, followed by visiting friends or relatives. Most outbound travelers went overseas also for Sightseeing, Recreation or Vacation purpose, followed by business.

#### Comparison of the Trip Purposes in 2003

Domestic vs. Outbound

Domestic Tourist Travel		Outbound Tourist Travel	
Purpose of the Trip	%	Purpose of the Trip	%
Sightseeing, Recreation, Vacation	61.4	Sightseeing, Recreation, Vacation	49.4
Visiting friends or relatives	19.3	Visiting friends or relatives	15.7
Business	1.0	Business	31.0
Ecological Tour	2.9		
Religious Tour	5.3		
Physical Exercising Vacation	7.5		
Conference or Studying Tour	1.0		

Short-term learning or study	---	Short-term learning or study	1.8
Others	1.7	Others	2.1
Total	100.0	Total	100.0

5. **Most tourists, domestic or outbound, took short distance trips:** In 2003, 65% of the domestic tourist travels were within tourist's own living region tours. For outbound travels, 81% of the trips were in nearby Asian countries; and more travelers visited Mainland China than any other place (34%).

Destinations of outbound Travels for year 2003

Region	Destination	Region (%)	Destination (%)
Total		103.7	114.9
China-Hong Kong-Macao	Hong Kong	39.3	8.3
	Mainland China		34.2
	Macao		2.5
Southeast Asia	Thailand	23.6	9.6
	Malaysia		3.5
	Singapore		2.1
	Indonesia		4.0
	Philippines		1.6
	Vietnam		4.2
Northeast Asia	Japan	18.0	15.0
	Korea		3.2
America	U.S.A.	11.2	8.6
	Canada		3.2
Europe	U.K.	3.6	0.6
	Netherlands		0.7
	Belgium		0.6
	France		1.2
	Germany		1.5
	Switzerland		0.3
	Austria		0.5
	Italy		1.3

Australia and New Zealand area	Australia	4.7	4.1
	New Zealand		0.7
Oceania	Palau	0.3	0.3
Africa	South Africa	0.2	0.2
Others	Others	2.9	2.9

Note: traveling regions were multi-choice.

- 6. North Region was the most important tourist market source for both domestic and outbound:** Analysis based on region of residence, we found that more domestic trips (43%) were taken by the residents of the North Region than any other region, followed by the South Region (29%) and the Central Region (26%), And 59% of all outbound trips were taken by the residents of the North Region as well. Therefore, North Region was the most important tourist market source for both domestic and outbound.

## Distribution of Domestic and Outbound Trips in 2003

### By Region of Residence

Region of Residence	Domestic Trips (%)	Outbound Trips (%)
North Region	43.2	58.7
Central Region	25.6	18.3
South Region	28.5	20.8
East Region	2.5	1.7
Kim-Mar Region	0.2	0.5
Total	100.0	100.0

7. **People tended to take more trips by themselves than joining group tours; more than eight-tenth of outbound travels arranged by travel agencies:** More tourists took trips by themselves than joining group tours. The proportions of individual tours for domestic travels and outbound travels were 90% and 69% respectively. Only 4% of all domestic tourist travels were arranged by travel agencies, while 82% of outbound tours were arranged through travel agencies.

### Type of Tour for Domestic and Outbound Travel in 2003

Item		Domestic Travel	Outbound Travel
Type of Tour	Individual Tour	89.5%	69.0%
	Group Tour	10.5%	31.0%
Arrangement	By Travel Agency	3.5%	82.1%
	Not by Travel Agency	96.5%	17.9%

8. **In 2003, total expenditure for domestic travels was NT\$218.1 billions, while outbound travels expenditure reached NT\$280.5 billions:** Average spending per day for domestic tourist travels (stayed out one night or more) was NT\$3,104, which was less than that of the outbound travels (NT\$4,147). Average spending per domestic person-trip was NT\$2,130, a decrease of 4%

from that of 2002. The expenditure of all domestic tourist travels was NT\$218.1 billions, an 8% decrease from 2002. As for outbound travels, average expense per person-trip was NT\$47,364, No significant change from that of 2002. However, due to the effect of SARS, the second quarter outbound tourist travel rate declined. Consequently the total number of all outbound travels decreased significantly. Therefore, the expenditure of outbound tourist travels was NT\$280.5 billions, a decrease of 19% from that of 2002. (equivalent to US\$8,110 millions, a 19% decrease from that of 2002).

#### Expenditure of Domestic and Outbound Travels in 2003

Item	Domestic Travel	Outbound Travel
Average Spending Per Day Trip (stayed out one night or more)	NT\$3,104 (+1%)	NT\$4,147 (-4%)
Average Spending Per Person Trip	NT\$2,130 (-4%)	NT\$47,364 (-0.4%)
Total Number of Trips	102,399,000 person trips (-4%)	5,923,072 person trips (-19%)
Total Travel Expenditure by All Citizens	NT\$218.1 billions (-8%) equivalent to US\$6,305 millions (-8%)	NT\$280.5 billions (-19.4%) equivalent to US\$8,110 millions (-19.5%)

Note: 1.the proportion of domestic tourist travels, Number inside parenthesis indicates

percent increase over 2002.

2.the proportion of outbound tourist travels, Number inside parenthesis indicates

percent increase over 2002.

- 9. Internationally, “Good Foods” is the most competitive item that Taiwan can offer to attract tourists:** outbound tourists (73%) regarded the superiority of Taiwanese foods over those of places they visited. This superiority existed in every region that outbound travelers visited. On the consumer goods prices, outbound tourists regarded that they were cheaper in Taiwan than North-East Asia, America and Canada, Europe, New Zealand and Australia region. For hardware facilities (ex. Traffic direction signs, transportation, amusement and recreational facilities, traveling information services, environment cleaning and beautification), Taiwan was superior to Mainland China, H.K., Macao and Southeast area; And on culture and natural scenery (ex. beautiful sightseeing, history culture), Taiwan was superior to South-East area.

Items	Proportion of Taiwan being better or much better								
	Natural Scenery	History culture	Consumer goods prices	Food s	Traffic direction signs	Transportation	Amusement and recreational facilities	Traveling information services	Environment cleaning and beautification
Traveling area									
Mainland China, H.K, Macao	46.9	36.0	13.9	69.9	72.0	73.3	60.6	66.9	72.5
South-East Asia	54.4	58.4	19.3	75.2	64.6	71.5	65.3	63.3	60.0
North-East Asia	26.2	32.6	75.9	73.1	27.4	26.6	19.5	29.9	9.7
America and Canada	22.6	34.6	63.7	77.8	25.4	39.2	15.8	33.7	10.5
Europe	20.4	28.1	80.1	67.4	39.7	36.7	27.5	18.3	20.3
New Zealand and Australia	16.6	32.3	65.1	65.2	18.2	54.3	24.0	35.1	8.4

Note: 1.the commodity prices-wise, Taiwanese was cheaper than other regions.

2.travel regions were multiple choices.

### C. The Factors Affecting Choice between Domestic and Outbound Travels

1. People with at least 36 thousands free-handed cash and over seven and half days vacation will want to go to nearby Asia area traveling: When asked about how many vacation days and budget available before they would consider to go abroad, 47% of people indicated that they needed 7-days vacation before they would consider any Asia nearby countries. On the average, people needed seven and half days before they would want to visit Asia nearby countries. And 42% of people needed NT\$50,000 extra money before they do so. Only 10% of people needed less than NT\$20,000 before they do so. Average extra money needed was more than NT\$36,000.

#### **Number of vacation days available**

before traveling to nearby Asia countries would be considered



Vacation Days	2 <sup>nd</sup> quarter		4 <sup>th</sup> quarter	
	Percentage	Excluding the percentage of not wanting to go to Asia countries and no answers	Percentage	Excluding the percentage of not wanting to go to Asia countries and no answers
Two days and under	0.0	0.2	0.1	0.2
3	2.9	3.9	2.5	3.4
4	2.3	3.1	2.4	3.4
5	19.8	26.3	18.5	25.5
6	2.4	3.2	3.1	4.3
7	35.5	47.1	34.9	48.1
8	0.8	1.1	0.6	0.8
9	0.1	0.1	0.0	0.0
10	4.7	6.2	4.2	5.8
11 and over	6.7	8.8	6.1	8.4
Don't want to go	22.4	--	26.3	--
No answers	2.4	--	1.1	--

Note: This item was asked in the second and fourth quarter interviews.

Extra money needed before people will consider to visit Asia countries

Amount Needed	2 <sup>nd</sup> Quarter	4 <sup>th</sup> Quarter
Under 10 thousand		
10 thousands to under 20 thousands	0.9	4.3
20 thousands to under 30 thousands	9.4	5.9
30 thousands to under 40 thousands	18.9	16.8
40 thousands to under 50 thousands	24.5	23.8
50 thousands to under 60 thousands	5.8	6.1
60 thousands and over	23.2	25.4
	17.3	17.6
Average amount needed	3,670,000	3,820,000

Note: This item was asked in second and fourth quarter interviews.

2. **East region was the most wanted place to visit:** The survey results indicated that considering the current personal financial and other conditions, 51% preferred domestic travels compared with 31% preferred outbound trips. Among those preferring domestic travels, most wanted to visit East Region (Hualien, Taitung), followed by South Region (Chiayi, Tainan, Kaohsiung, Pingtung). Among those preferring outbound travels, most wanted to visit North-East Asia (Japan, Korea), followed by South-East Asia or Europe.

Preference for the Domestic traveling destinations

Region	2 <sup>nd</sup> Quarter	4 <sup>th</sup> Quarter
North Region	13.2	14.3
Central Region	11.5	13.3
South Region	22.7	21.8
East Region	37.0	36.8

Off island Region	15.7	13.8
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Note: This item was asked in second and forth quarter interviews.

Preference for the outbound traveling areas

Countries/areas	2 <sup>nd</sup> Quarter	4 <sup>th</sup> Quarter
Hong Kong-Macao	3.2	2.0
South-East Asia	21.6	15.8
Mainland China	8.9	9.2
America	8.6	8.1
Europe	21.3	21.6
Africa	0.6	0.8
Australia and New Zealand area	6.0	7.2
Okinawa	0.9	0.8
North-East Area	28.6	33.8
Other	0.5	0.7

Note: This item was asked in second and fourth quarter interviews.

3. **Expense was the most important Factor considered by tourists for outbound travels:** The most important factor considered in choosing an outbound travel was expense, followed by time and destination.

Factors considered by Outbound travelers (degree of importance)

Factors Considered	2 <sup>nd</sup> Quarter	4 <sup>th</sup> Quarter
Total	100.0	100.0
Expense	35.7	34.7
Time	32.8	34.1

Destination	31.4	31.2
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Note: This item was asked in second and fourth quarter interviews.

## II、 Important Indexes of Domestic and Outbound Travels

### A. R.O.C. Citizens' Domestic Tourist Travel Index

#### R.O.C. Citizens' Domestic Tourist Travel Index

Item	2003	2002	Change
Proportion of people taking domestic tourist travel	90.1%	89.7%	No significant change
Average number of trips per person	5.39 trips	5.62 trips	Decrease 0.23 trips
Total number of trips by all citizens	102,399,000 trips	106,278,000 trips	Decrease 3.6%
Average number of places visited each trip	1.71 places	1.63 places	Increase 0.08 place
Average number of days per trip	1.7 days	1.7 days	No significant change
Percentages of trips taken during holidays and weekends	74.1%	73.2%	Increase 0.9%
Over all degree of satisfaction	95.7%	94.9%	Increase 0.8%
Average expenses Per person trip	NT\$2,130 (US\$61.58)	NT\$2,228 (US\$64.43)	Decrease 4.4%
Total expenditure of domestic travels by all citizens	NT\$218.1 billions (US\$6.305 billions)	NT\$236.8 billions (US\$68.48 billions)	Decrease 7.9%

## B. R.O.C. Citizens' Outbound Travel Index

### R.O.C. Citizens' Outbound Travel Index

Item	2003	2002	Change
Proportion of people taking outbound travels	15.2%	21.1%	Decrease 6%
Total number of trips taken by all citizens (Note 1)	5,923,072 trips	7,319,466 trips	Decrease 19.1%
Average number of outbound trips per person (Note 2)	0.26 trip	0.35 trip	Decrease 0.09 trip
Average number of nights per trip (Note 3)	10.97 nights	10.60 nights	Increase 0.37 night
Average expenditure per person trip	NT\$47,364 (US\$1,369)	NT\$47,567 (US\$1,376)	NT\$: decrease 0.4% (US\$: decrease 0.5%)
Total expenditure on outbound travels by all citizens	NT\$280.5 billions (US\$81.10 billions)	NT\$348.2 billions (US\$100.69 billions)	NT\$: decrease 19.4% (US\$: decrease 19.5%)

Note: 1. Data source: monthly statistics on Tourism.

2. Average number of outbound trips per person = total number of outbound trips /total population in Taiwan-Fukien Area.

3. Data source: monthly statistics on Tourism, including only 60 nights or fewer.

