

2002 Survey of Travel by R.O.C Citizens

Executive Summary

The objectives of this study are to understand, in 2002, 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 2002. The survey period covered from January 1, 2002 through December 31, 2002.

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 of 5,000 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 5,533 persons, second quarter 5,297 persons, third quarter 5,276 persons and fourth quarter 5,218 persons. The completed outbound interviews were fewer: first quarter 373 persons, second quarter 369 persons, third quarters 396 persons and fourth quarter 353 persons.

The survey results are summarized in the following three sections:

I. Statistical analysis

A. Domestic Travels

1. Nine out of ten citizens had domestic travels, an increase of 4% over that of 2001: During the year of 2002, 90% of the citizens 12 years or older traveled at least once domestically and every quarter the proportion of people who traveled was higher than that of 2001 except the fourth quarter which equaled 2001 in traveling proportion.

Proportions of People Having Domestic Travels

Year	Proportion of People Traveled (%)
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	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	whole year
2002	65.4	60.1	61.4	56.6	89.7
2001	60.5	55.6	53.0	55.0	86.1

2. The estimated total number of domestic tourist trips taken by citizens of 12 years or older reached one hundred and six millions: The average number of trips during the year 2002 was 5.62, which was higher than 5.26 in 2001. The estimated total number of domestic tourist trips taken by citizens of 12 years or older was 106,278,000 trips, an increase of 9.1% over that of 2001. And the total number of trips traveled by all citizens was estimated at 130,741,000 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 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	
2002	1.37	1.37	1.60	1.31	5.62
2001	1.68	1.17	1.13	1.28	5.26

3. “Did not have time” was still the main reason for people not having domestic travel: During the year of 2002, there were one out of ten people who did not take any domestic tourist travel, a decrease of 4% from that of 2001. And the leading reason for not traveling, was “Did not have time”(43%); and the second major reason was “Not interested in traveling”(21%), while “Could not afford”(16%), or “Poor health”(12%) were ranked third.

Reasons for not traveling

Unit: %

Item	2002	2001
Did not have time	43.0	44.1
Not interested	21.1	18.8
Could not afford	15.8	13.2
Poor health	12.1	13.6
Outbound travel	2.0	2.0

Could not find companions	1.8	4.1
Did not know good tourist places	0.9	1.3
Transportation problem	0.6	0.0
Poor weather	0.6	0.0
Too crowded in tourist place	0.2	0.4
Other reasons	2.0	1.6
Total	100.0	100.0

4. Domestic tourist trips made on weekends increased: 58% of the domestic tourist trips were taken on weekends, an increase of 1% over 2001 ; while 16% of the trips were taken on national holidays. The main purposes of domestic tourist travels were vacation, relaxation and recreation (61%), an increase of 6%, and visiting friends and relatives, (19%), followed by religious travels (6%), ecological tours (6%), and physical exercising vacations (4%).

Day Used For Domestic Tourist Travel

Unit: %

Day of Travel		2002	2001
Total		100.0	100.0
Weekends		57.5	56.2
National Holidays		15.7	16.2
Weekdays	Annual Leaves	5.4	4.6
	Summer or Winter Breaks	3.7	5.1
	Other weekdays	17.7	19.2

Purposes of Domestic Tourist Travels

Unit: %

Purpose of the Trip	2002	2001
Sightseeing, Recreation, Vacation	60.5	54.1
Visiting friends and relatives	18.7	22.6
Business	1.5	1.8
Ecological tours	5.9	6.2
Religious travels	6.0	6.4
Physical exercising vacations	4.0	4.4
Conference or Studying Tour	1.3	1.5
Others	2.1	2.9

5. Most of the trips were short distances, over six-tenth were one-day round trips: For year 2002, 62% of the trips were within same region; especially in the south region, 73% of the trips were traveled within the south region; while within region travels for the north region was 69%. As for duration of the trips, most of them(63%) were same-day returns. Average duration of each trip was 1.7 days (about the same as in 2001).

2002 Proportion of Tourists Visited Each Region

Unit: %

Region Visited	Residence				
	North Region	Central Region	South Region	East Region	Kim-Mar Region
North Region	69.2	21.8	18.8	8.0	0.5
Central Region	25.6	59.8	28.4	5.5	0.3
South Region	17.4	17.2	72.0	8.6	0.6
East Region	34.2	14.0	31.0	45.2	0.6
Kim-Mar Region	39.1	16.7	7.2	1.8	58.4

Distribution on Durations of Tourist Trips

Unit: %

Number of Days Traveled	2002	2001
1 Day	62.8	62.1
2 Days	22.5	22.0
3 Days	9.7	10.4
4 or more days	5.0	5.4
Average number of days per trip	1.7 days	1.7 days

6. Almost nine-tenth of the tourist trips were completely planned by tourists themselves; most of the advanced information were obtained from friends, relatives or colleagues; while the use of internet increased: Majority of the tourists planned the trips completely by themselves (89%) while other types of planning were each used by less than 5% of the tourists. Only 4% of the trips were arranged by travel agencies. Before the trips, 58% of the tourists obtained travel information. And most of them (56%) obtained it from friends, relatives or colleagues. 13% of people obtaining information through Internet, an increase of 3% over that of 2001.

Sources of Travel Information

Unit: %

Information Sources		2002	2001
Friends, Relatives Colleagues, Classmates		55.7	58.0
Television		14.6	13.7
Internet		12.6	9.9
Reading Media	Newspapers	12.5	13.1
	Travel Books	8.2	8.5

	Magazines	7.0	7.7
Tourism Bureau or Agencies		3.5	3.7
Travel Agencies		3.1	2.6
Outdoor Bulletin		1.4	1.3
Radio		1.1	1.1
Tourism Shows or Exhibits		0.6	0.4
Others		3.7	4.6

7. “Natural scenery sightseeing” was still the most popular activity enjoyed by the majority of the tourists: The most important factors considered by the tourists when they chose visiting places were “beautiful natural scenery” (23%) followed by “visiting friends or relatives” (17%). Other important factors considered were “Having theme activities” (13%), “Distance” (10%), etc. The activity that most tourists (75%) enjoyed was “natural scenery sightseeing”; in particular, 93% 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, religions and amusement park activities in the Central, religious activities and swimming, diving and surfing in the South, and hot-spring, SPA, swimming, diving and surfing in the East.
8. Kenting National Park, Tamshui, Yangmingshan National Park and East Coast National Scenic Area were the most visited domestic tourist resorts: North Region was visited by the largest number of tourists, accounted for 43%; followed in its orders were South Region (36%), Central Region (30%), East Region (8%), and King-Mar Region (1%). As for places visited by tourists, Kenting National Park, Tamshui, Yanmingshan National Park and East Coast National Scenic Area were the four places with largest number of tourists, each accounted for 2.7% or more of all trips taken by all tourists through out the year 2002. The average number of places visited on each trip was 1.6.

Ten Most Visited Resorts in 2002

Tourist places	Percentage
Kenting National Park	7.8
Tamshui	3.3

Yangmingshan National Park	2.9
East Coast National Scenic Area	2.7
Jihben Hot Springs Scenic Area	1.6
National Museum of Marine Biology & Aquarium	1.6
Taroko National Park	1.4
Dongshan River Scenic Area	1.2
Alishan Forest Recreation Area	1.2
Shilin Night Market	1.2

9. 95% of all tourists were satisfied with the overall impressions of the places visited: The survey indicates that tourists were most satisfied with “attendants services in the places they visited” (90%), and “the natural scenery and natural resources protection” (90%), followed by “travel safety” (88%), “ground maintenance” (85%). And 95% tourists were satisfied with the overall impressions of the places they visited. However, about 22% to 30% of the tourists were dissatisfied with “traffic jams”, “entrance ticket prices”, “lavatories”, “public transportation connected with outside” and “parking facilities”. Fast improvements on these are needed.

Tourists Degree of Satisfaction With Places Visited in 2002

Unit: %

Items	Satisfied	Dissatisfied	No opinion
Natural Scenery and natural resources protection	90.2	8.8	1.0
Attendants Services	90.0	6.0	4.0
Travel Safety	88.2	9.4	2.3
Ground maintenance	85.4	13.6	1.0
Amusement facilities	83.0	10.7	6.4
Food facilities	82.0	14.9	3.2
Lodging facilities	81.2	10.0	8.8
Signs and directions	79.8	15.1	5.2
Lavatories	72.6	24.1	3.3
Parking facilities	72.0	22.3	5.8
Levitation of traffic jams	69.2	27.7	3.1
Entrance ticket prices	66.7	24.7	8.7
Public transportation	66.6	23.0	10.5
Overall satisfaction	94.9	4.5	0.7

10. The R.O.C. citizens' total domestic tourist traveling expenditure in 2002 was NT\$ 236.8 billions, a decrease of 2% from the previous year: Based on this survey, the average expenditure for each person per trip was estimated at NT\$ 2,228, a decrease of 10.2% from the year before; food (25%) and transportation (24%) accounted for most of the expenses, followed by shopping expenditure (21%). The total domestic tourist travel expenses by all citizens in 2002 were estimated at NT\$236.8 billions, a 2% decrease from that of 2001.

Average Expenses of Domestic Tourist Travel Per Person-Trip in 2002

By With/Without Lodging

Unit: NT\$

Item	Total	With lodging expenses	Without lodging expenses	Same-day return
Total	2,228	4,945	1,429	1,063
Food and Beverage	560	1,064	413	321
Transportation	545	1,028	402	280
Shopping	477	729	403	305
Lodging	401	1,765	0	0
Entertainment	155	290	116	97
Others	90	69	96	61

B. Comparisons of Domestic Travels and Outbound Travels

- 1. Outbound traveler's desire for domestic travel was very high:** During 2002, 90% of all citizens took at least one domestic tourist trip; while 21% had at least one outbound travel. Further analysis on mutual effect of domestic and outbound travels, we found that outbound travelers had a higher proportion of domestic travel than that of non-outbound travelers, 95%vs. 88%. And those who had domestic tourist travels also had higher proportion of outbound travels than those who did not have domestic tourist travel, 22% vs. 11%. These indicate that outbound travelers were a group of people who liked to travel; most of them also took domestic tourist travels.

Comparison of Domestic Tourist Travel vs. Outbound Travel in 2002

Status of Travel	Domestic Tourist Travel	Outbound Travel
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Did not Travel	10.3%	78.9%
Did Travel	89.7%	21.1%
Average number of Trips Per Person 12 yrs or old	5.62	0.35
Total number of Trips by All Citizens	106,278,000 person-trips (12 yrs or older) 130,741,000 person-trips (all ages)	7,319,466 person-trips

Proportions of Domestic Tourist Travel in 2002

Outbound Travelers vs. Non-outbound Travelers

Status	Outbound Travelers (21.1%)	Non-outbound Travelers (78.9%)
Had Domestic Travel	94.6%	88.3%
No Domestic Travel	5.4%	11.7%
Total	100.0%	100.0%

2. **Two-tenth of people had both domestic and outbound travels:** In 2002, seven-tenth of people (70%) had only domestic tourist travels without oversea tour; 20% 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 2002

Outbound Travel	No	Yes	Total
Domestic Travel			
No	<u>9.2%</u>	1.1%	10.3%
Yes	69.7%	<u>20.0%</u>	89.7%
Total	78.9%	21.1%	100.0%

3. **Outbound travelers' male proportion, average age and proportion of tourists with monthly income higher than NT\$40,000 were all higher than those of the domestic tourist travelers:** Comparisons between months, we found that more tourists took domestic travels in February than in any other month, accounted for 14%; while more outbound travels were taken in July (10%) or August (10%). Gender-wise, domestic travelers were evenly divided between males and females; while male outbound travelers out numbered females (58% vs. 42%). 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. 43%. As for profession, student (20%) was the largest group among domestic tourists, while outbound travelers had more managers or supervisors (19%) than any other profession.

Characteristics Comparison Between Domestic Tourists and Outbound Travelers in 2002

Characteristics	Domestic Tourist	Outbound Traveler
Month	more in February (14.2%), August (10.1%), the second June (9.7%), September (9.6%)	more in July (10.2%), August (9.8%), April (8.7%), May (8.6%), October (8.5%)
Gender	male female evenly divided	more males (58.1%)
Age	Average Age : 37	Average Age : 40
Monthly Income	19% with income higher than NT\$40,000	43% with income higher than NT\$40,000
Profession	more in Students (19.9%) Housewives (14.8%) Services or sales Personnel (13.8%)	more in Managers or Supervisors (19.2%) Services or sales Personnel (11.7%) Students (10.8%) Housewives (9.6%)

4. **Six-tenth of domestic tourist trips and half 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 and visiting friends or relatives.

Comparison of the Trip Purposes in 2002

Domestic vs. Outbound

Domestic Tourist Travel		Outbound Travel	
Purpose of the Trip	%	Purpose of the Trip	%
Sightseeing, Recreation, Vacation	60.5	Sightseeing, Recreation, Vacation	50.9
Visiting friends or relatives	18.7	Visiting friends or relatives	16.5
Business	1.5	Business	28.8
Ecological Tour	5.9	Shorterm Study or Abroad Study	2.8
Religious Tour	6.0	Others	1.0
Physical Exercising Vacation	4.0		
Conference or Studying Tour	1.3		
Others	2.1		
Total	100.0		

5. **Most tourists, domestic or outbound, took short distance trips:** In 2002, 62% of the domestic tourist travels were within tourist's own living region tours. For outbound travels, eight-tenth of the trips were in nearby Asian countries; and more travelers visited Mainland China than any other place (41%, an increase of 2.5% over 2001).

Destinations of outbound Travels for year 2002

Region	Destinations	Region (%)	Destinations (%)
China-Hong Kong-Macao	Hong Kong	46.2	8.8
	Mainland China		41.1
	Macao		2.2
Southeast Asia	Thailand	21.2	8.5
	Malaysia		3.5
	Singapore		3.1
	Indonesia		3.7
	Philippines		1.5
	Vietnam		3.4
Northeast Asia	Japan	14.0	12.1
	Korea		2.1
America	U.S.A.	13.6	10.5
	Canada		4.8
Europe	Netherlands	3.4	0.8
	Belgium		0.5
	Germany		0.8
	France		1.2
	Switzerland		0.5
	Italy		1.0
	U.K.		0.8
Oceania	Australia	2.9	1.6

	New Zealand		1.4
Africa	South Africa	0.1	0.1
Others	Others	2.9	2.9

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 regions, followed by the South Region (28%) and the Central Region (26%), And 60% 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 2002

By Region of Residence

Region of Residence	Domestic Trips (%)	Outbound Trips (%)
North Region	42.9	59.5
Central Region	26.1	16.7
South Region	28.3	21.8
East Region	2.5	1.4
Kim-Mar Region	0.2	0.6
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 were arranged by travel agencies:** More tourists took trips by themselves than joining group tours. For Domestic tourist travels, the ratio was 89% to 11%; and for outbound travels it was 69% to 31%. Only 4% of all domestic tourist travels were arranged by travel agencies; while 84% of outbound tours were arranged through travel agencies.

Type of Tour for Domestic and Outbound Travel in 2002

Item		Domestic Travel	Outbound Travel
Type of Tour	Individual Tour	88.6%	69.0%
	Group Tour	11.4%	31.0%
Arrangement	By Travel Agency	3.7%	83.5%
	Not by Travel Agency	96.3%	16.5%

8. **In 2002, total expenditure for domestic travels was NT\$236.8 billions, while outbound travels expenditure reached NT\$348.2 billions:** Average spending per day for domestic tourist travels, that stayed out one night or more was less than the outbound travels, NT\$3,073 vs. NT\$4,328. Average spending per domestic person-trip was NT\$2,228, a decrease of 10% from that of 2001. The expenditure of all domestic tourist travels was NT\$236.8 billions a 2% decrease from 2001. As for outbound travels, average expense per person-trip was NT\$47,567, an increase of 2% over that of 2001. And the total expenditure of all outbound travels in 2002 was NT\$348.2 billions, an increase of 4.1% over that of 2001. (equivalent to US\$10,069 millions, a 1.7% increase over that of 2001).

Expenditure of Domestic and Outbound Travels in 2002

Item	Domestic Travel	Outbound Travel
Average Spending Per Day Trip	NT\$3,073 (-12%) (stayed out one night or more)	NT\$4,328 (+3.1%)
Average Spending Per Person Trip	NT\$2,228 (-10.2%)	NT\$47,567 (+1.7%)
Total Number of Trips	106,278,000 person trips (+9.1%)	7,319,466 person trips (+2.3%)
Total Travel Expenditure by All Citizens	NT\$236.8 billions (-2%) equivalent to US\$6,848 millions (-4.2%)	NT\$348.2 billions (+4.1%) equivalent to US\$10,069 millions (+1.7%)

Note: Number inside parenthesis indicates percent increase over 2001.

- 9. “Expense” was the most important factor considered by tourists for both domestic and outbound travels:** According to this survey, with NT\$10,000 and three days vacation, 74.4% of people would choose domestic trips while only 17.7% would take outbound travels. 85% of people needed 5-10days time-off before they would consider any outbound travels; and 50% of people needed NT\$50,000 extra money before they do so. (the average expense per outbound trip was NT\$47,567). The most important factor considered in choosing an outbound travel was expense (36%), followed by time (33%) and destination (31%).
- 10. East Region was the most wanted place to visit:** The survey results indicated that considering the current personal financial and other conditions, 47% preferred domestic travels compared with 35% preferred outbound trips. Among those preferred domestic travels, 36% wanted to visit East Region, while for those preferring outbound travels, 30% wanted to visit Northeast Asia, 23% preferred Europe.

Under the current personal financial and other conditions, places most wanted to visit in 2002

Domestic vs. Outbound

Items	Domestic travel (46.6%)	Outbound travel (34.8%)
Destinations	East Region (35.9%)	Northeast Asia (30.4%)
	South Region (21.2%)	Europe (22.1%)
	North Region (15.6%)	Southeast Asia (13.8%)
	Off-island Region (13.8%)	Mainland China (13.7%)
	Central Region (9.9%)	Australia and New Zealand (7.0%)
	No response (3.7%)	America (6.6%)
		Hong-Kong and Macao (3.2%)
		Other (2.5%)
	No response (1.1%)	

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	2002	2001	Change
Proportion of people taking domestic tourist travel	89.7%	86.1%	increase 3.6%
Average number of trips per person	5.62 trips	5.26 trips	increase 0.36 trips
Total number of trips by all citizens	106,278,000 trips	97,445,000 trips	increase 9.1%
Average number of places visited each trip	1.63 places	1.5 places	increase 0.13 place
Average number of days	1.7 days	1.7 days	no significant

per trip			change
Percentages of trips taken during holidays and weekends	73.2%	72.4%	increase 0.8%
Over all degree of satisfaction	94.9%	94.6%	no significant change
Average expenses per person trip	NT\$2,228	NT\$2,480	Decrease 10.2%
Total expenditure of domestic travels by all citizens	NT\$236.8 billions	NT\$241.7 billions	decrease 2.0%

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

R.O.C. Citizens' Outbound Travel Index

Item	2002	2001	Change
Proportion of people taking outbound travels	21.1%	22.6%	No significant change
Total number of trips taken by all citizens (Note 1)	7,319,466 trips	7,152,877trips	increase 2.3%
Average number of outbound trips per person (Note 2)	0.33 trip	0.32 trip	Increase 0.01 trip
Average number of nights per trip (Note 3)	10.60 nights	10.33 nights	increase 0.27 night
Average expenditure per person trip	NT\$47,567 (US\$1,376)	NT\$46,784 (US\$1,384)	NT\$:increase1.7% (US\$:decrease0.58%)
Total expenditure on outbound travels by all citizens	NT\$348.2 billions (US\$10.069 billions)	NT\$334.2 billions (US\$9.900 billions)	NT\$:increase4.1% (US\$:increase1.7%)

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

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

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