



GUAM VISITORS BUREAU

China Visitor Tracker Exit Profile

FY2014

4th Qtr. (JULY~SEPT 2014)



Prepared by: QMark Research

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Background & Methodology

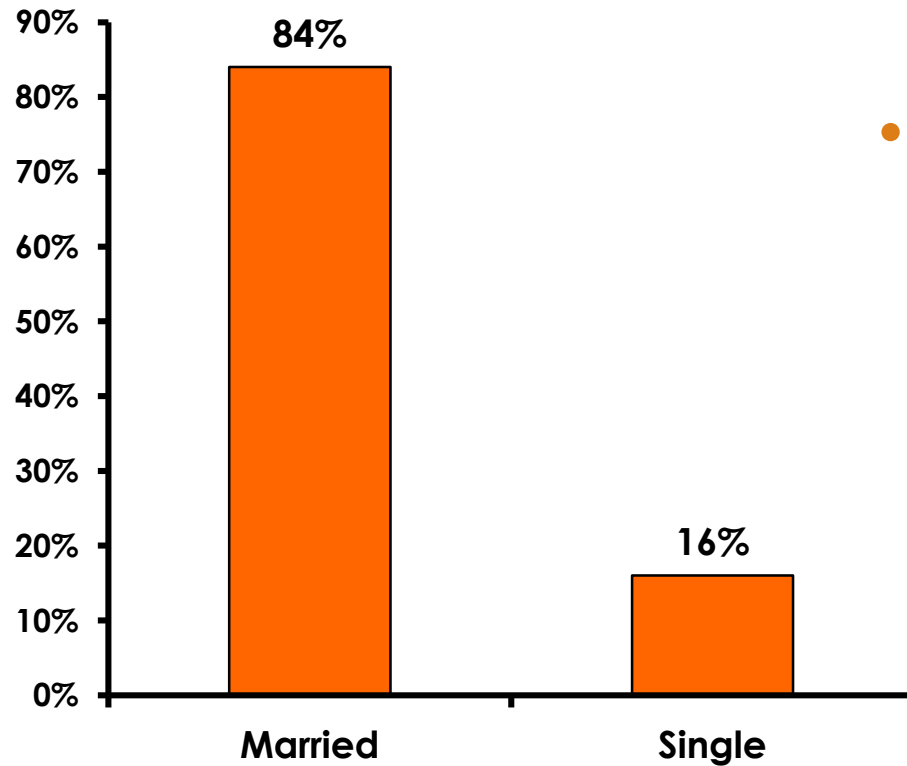
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **100** departing China visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **100** is +/- 9.80 percentage points with a 95% confidence level. That is, if all China visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 9.80 percentage points.

OBJECTIVES

- To monitor the effectiveness of the China seasonal campaigns in attracting China visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the China marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

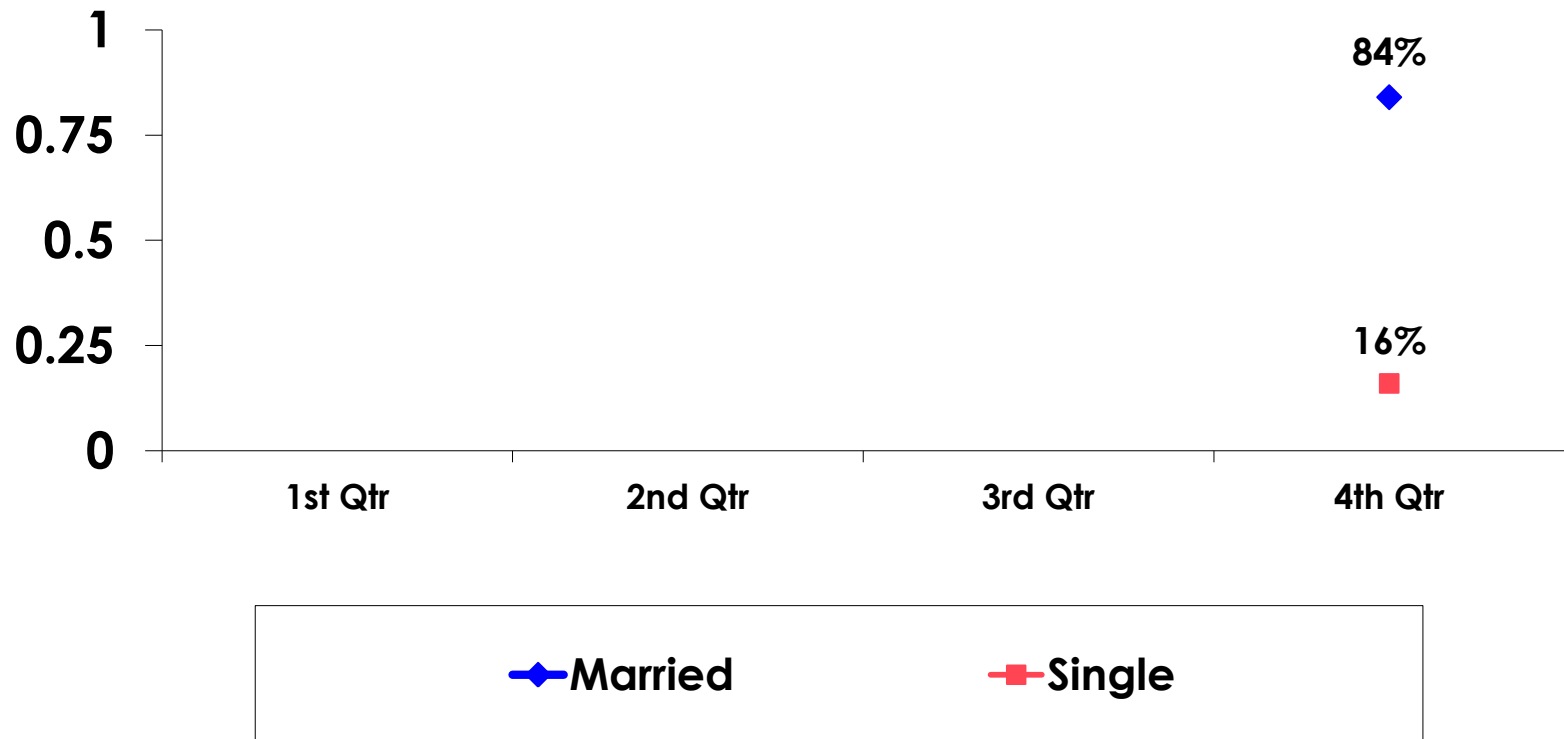
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

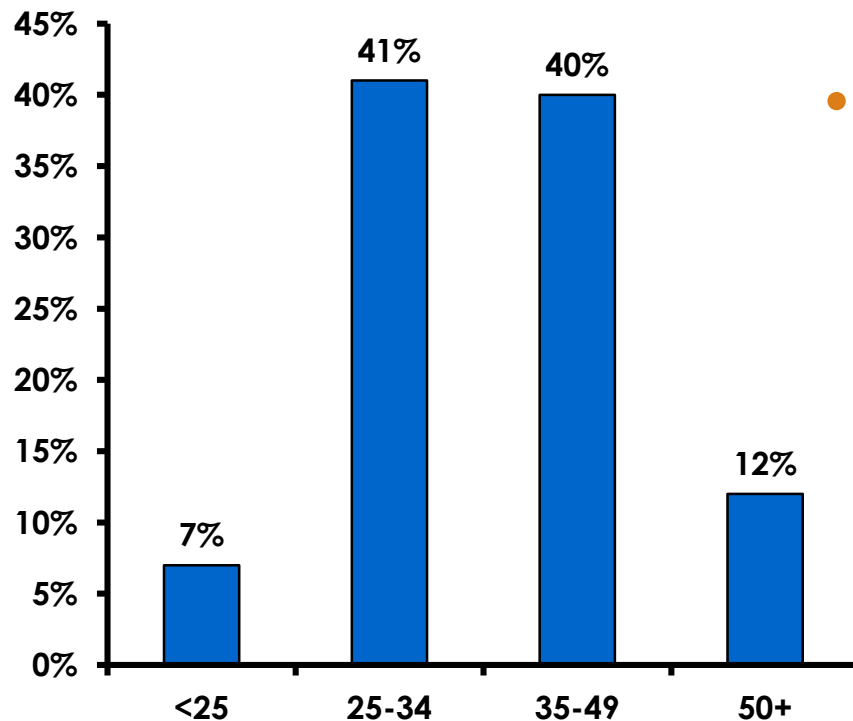


- Majority of visitors are married.

MARITAL STATUS

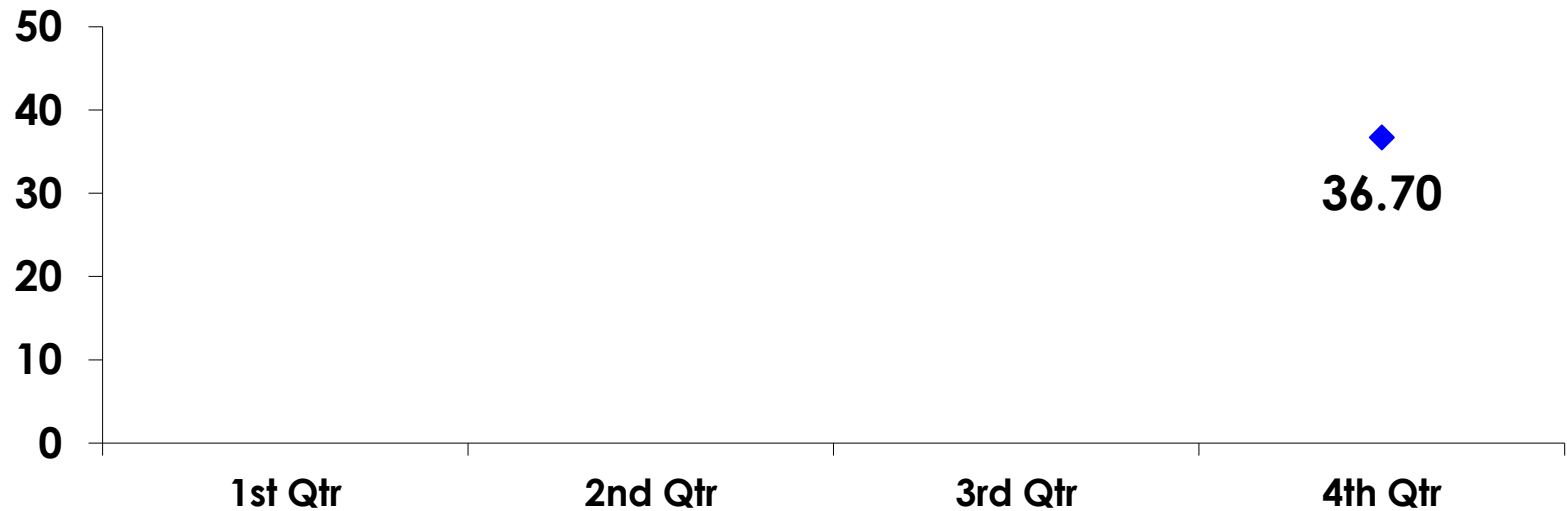


Age - Overall

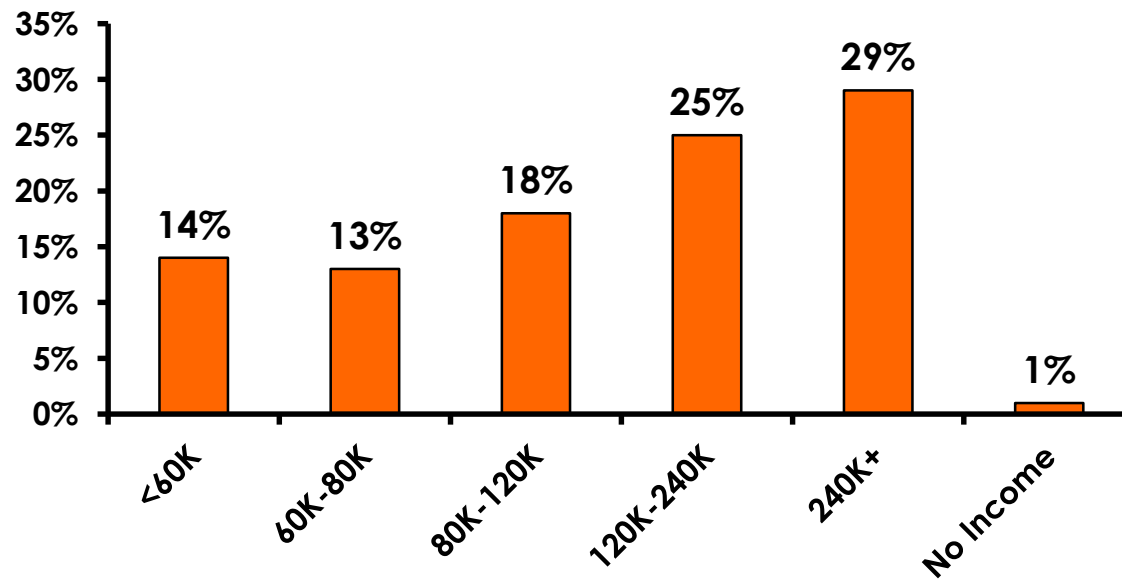


- The average age of the respondents is 36.70 years of age.

AVERAGE - AGE

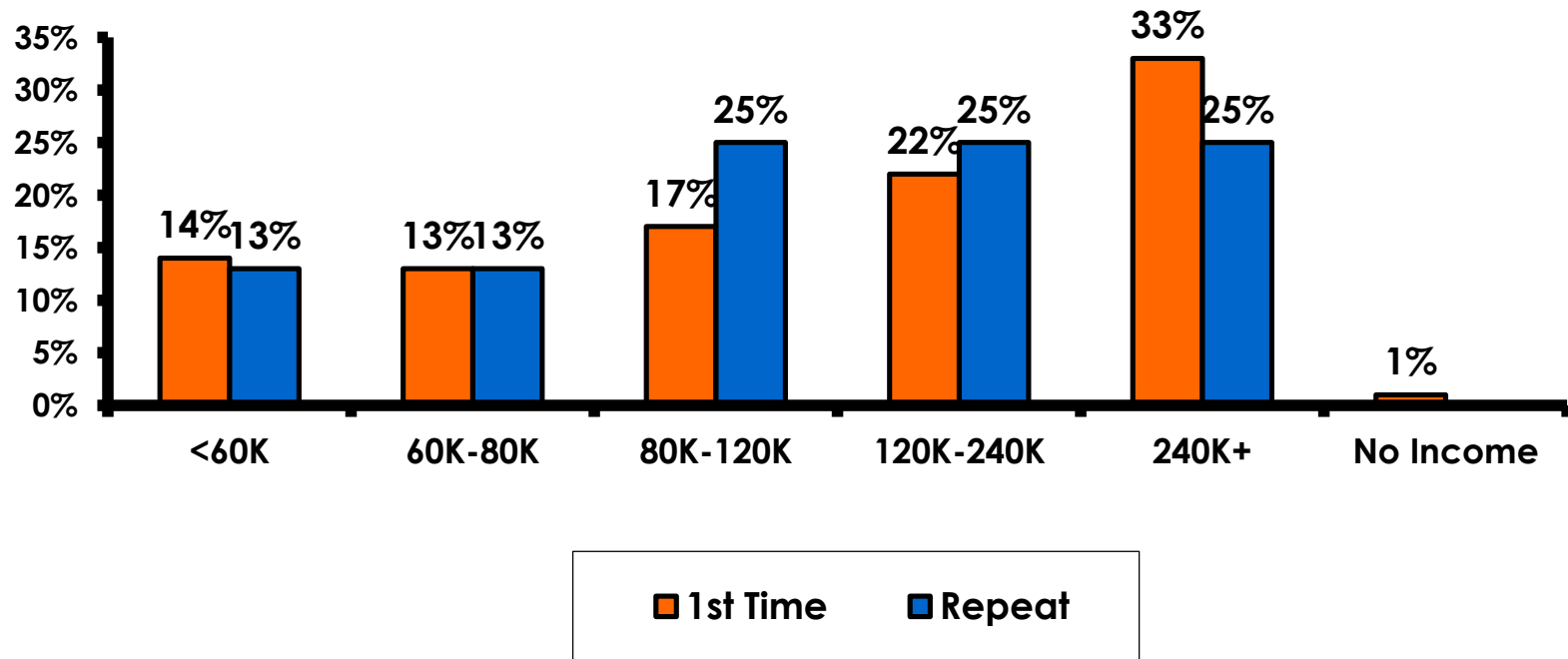


Personal Income



- Yuan 6.15=\$1

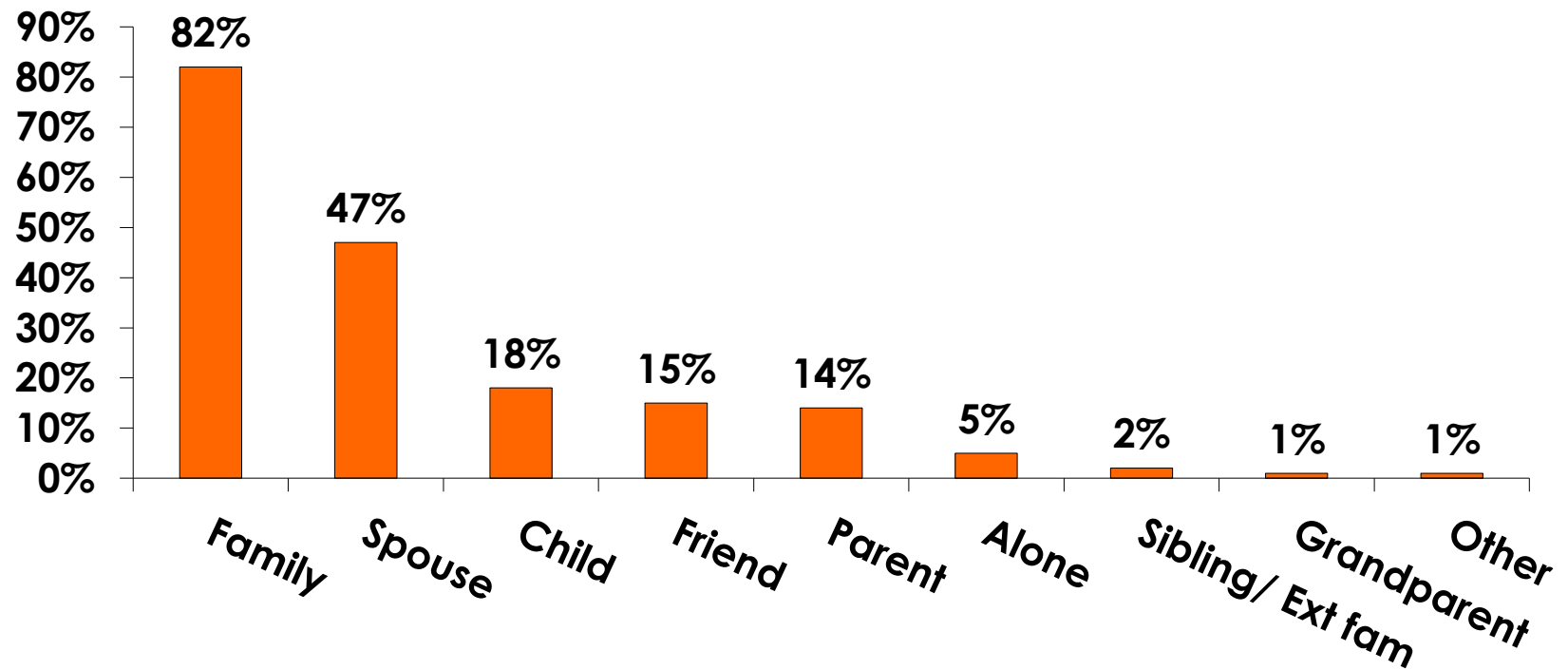
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<=CBY40K	Count	2	1	1	1	1		
		Column N %	2%	2%	2%	17%	2%		
	CNY40K - CNY60K	Count	11	5	6		4	2	5
		Column N %	12%	9%	15%		10%	5%	45%
	CNY60K - CNY80K	Count	12	5	7	1	4	4	3
		Column N %	13%	9%	17%	17%	10%	11%	27%
	CNY80K - CNY120K	Count	17	12	5		7	8	2
		Column N %	18%	22%	12%		17%	22%	18%
	CNY120K - CNY240K	Count	24	12	12	3	11	9	1
		Column N %	25%	22%	29%	50%	27%	24%	9%
	CNY240K+	Count	28	19	9		14	14	
		Column N %	29%	35%	22%		34%	38%	
	No Income	Count	1		1	1			
		Column N %	1%		2%	17%			
	Total	Count	95	54	41	6	41	37	11

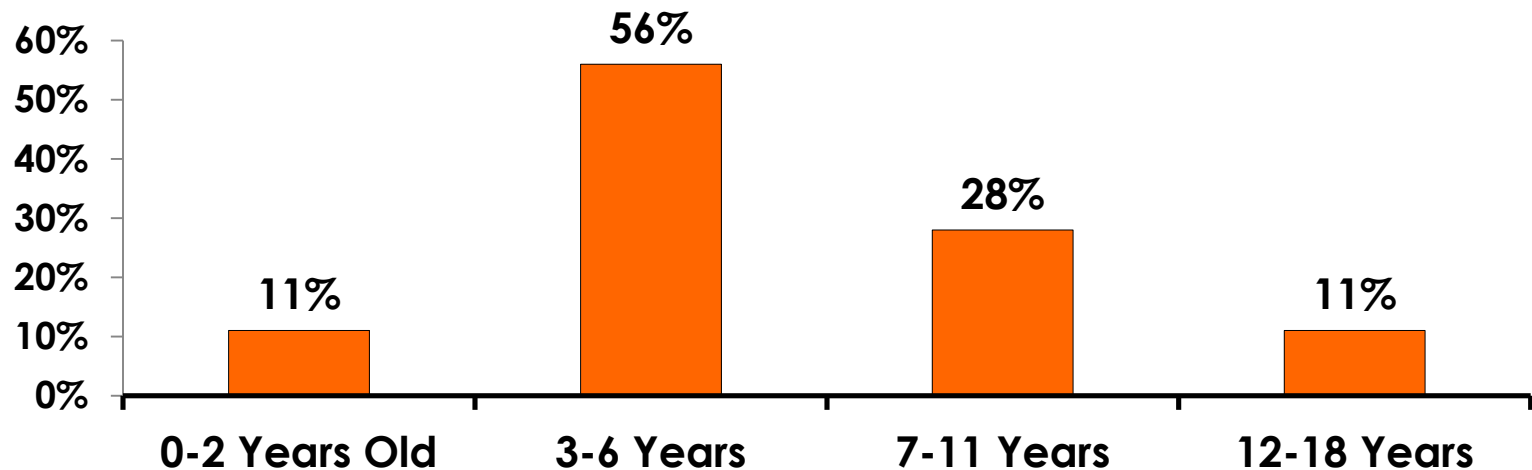
Travel Companions



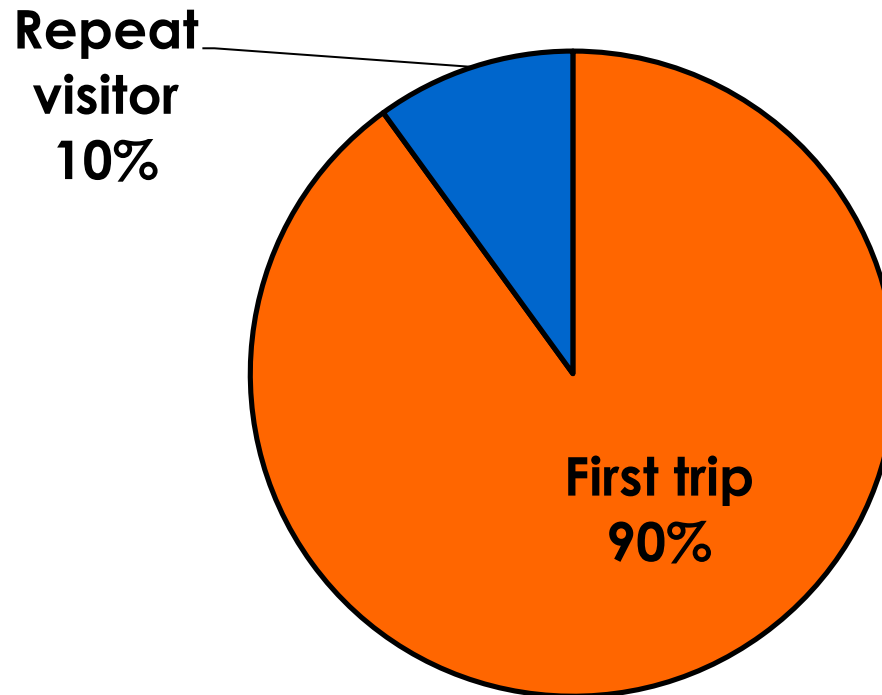
Number of Children Travel Party

N=18 total respondents traveling with children.

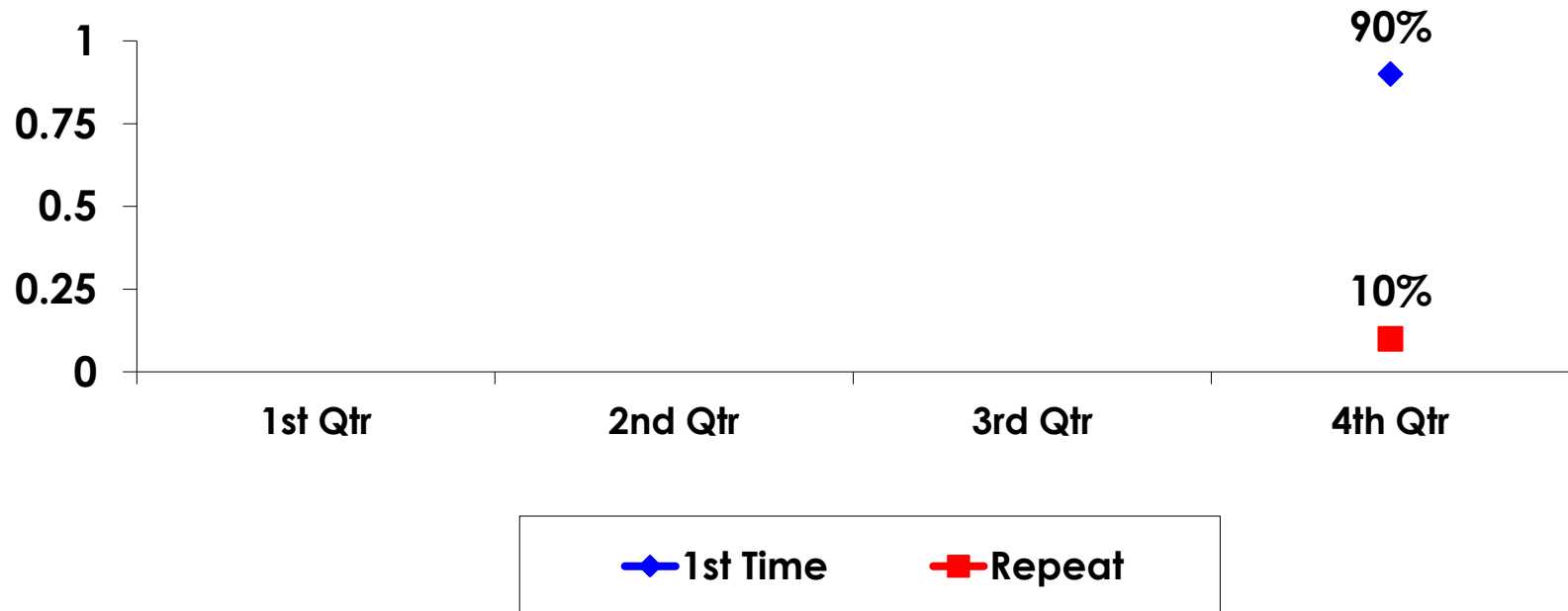
(Of those N=18 respondents, there is a total of 19 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



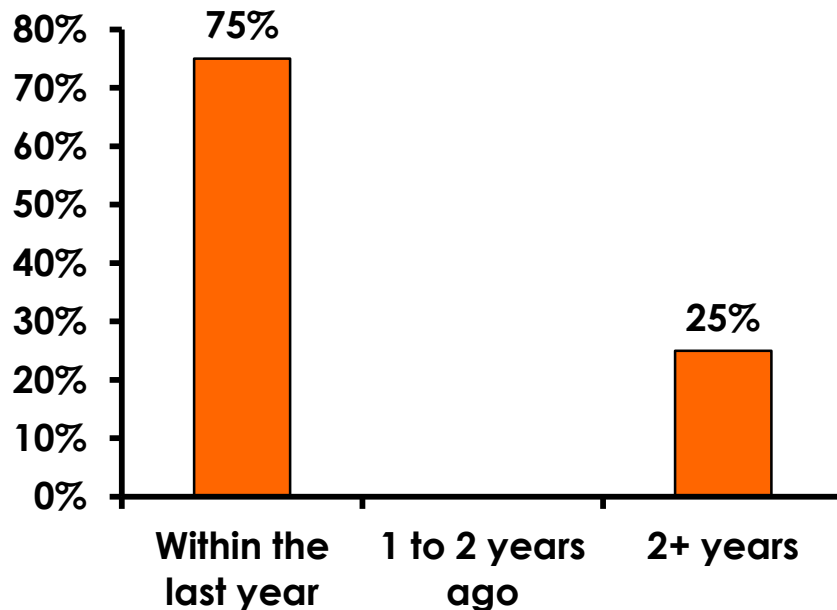
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	61	45	7	
		Column N %	60%	55%	78%	
	Female	Count	41	37	2	
		Column N %	40%	45%	22%	
	Total	Count	102	82	9	
AGE	18-24	Count	7	7		
		Column N %	7%	9%		
	25-34	Count	42	34	3	
		Column N %	41%	41%	33%	
	35-49	Count	41	34	4	
		Column N %	40%	41%	44%	
	50+	Count	12	7	2	
		Column N %	12%	9%	22%	
		Total	Count	102	82	9

- Most from China are first-time visitors to Guam.

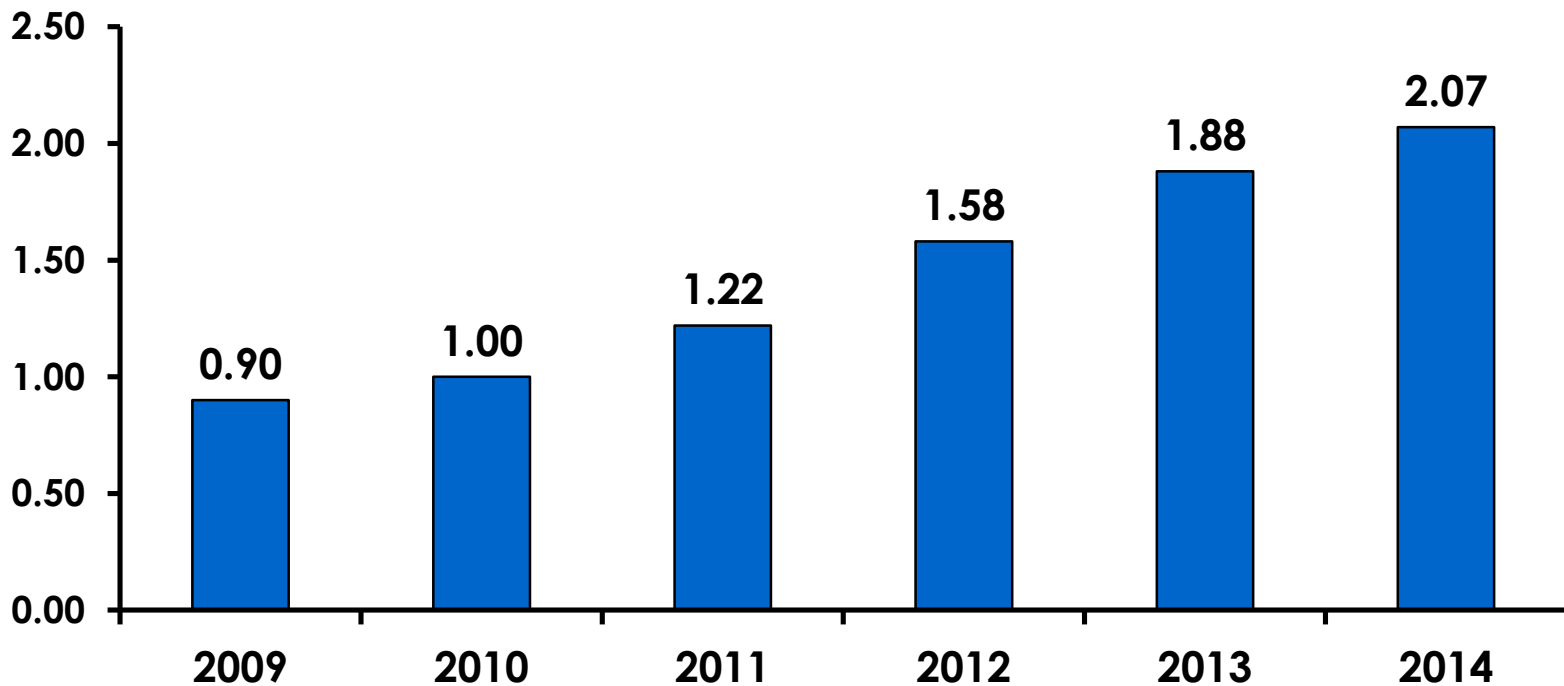
Repeat Visitors Last Trip

n = 8



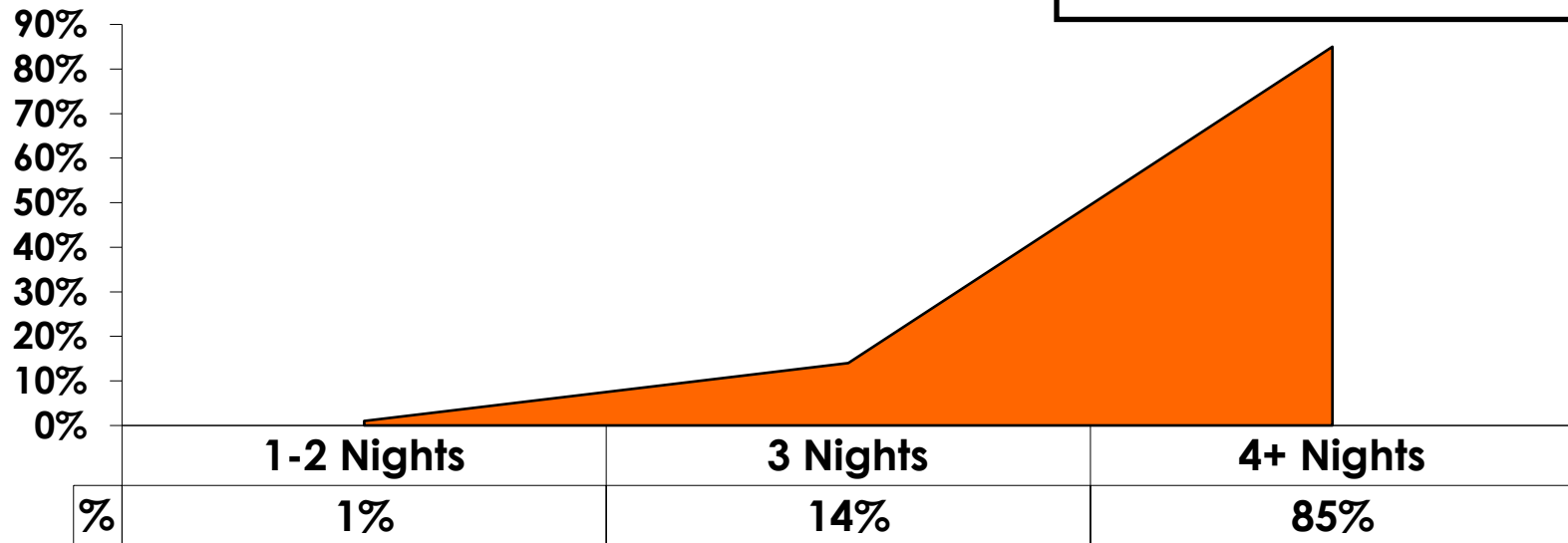
- The average repeat visitor has been to Guam 3.25 time.

Average Number Overnight Trips (2009-2014) (2 nights or more)

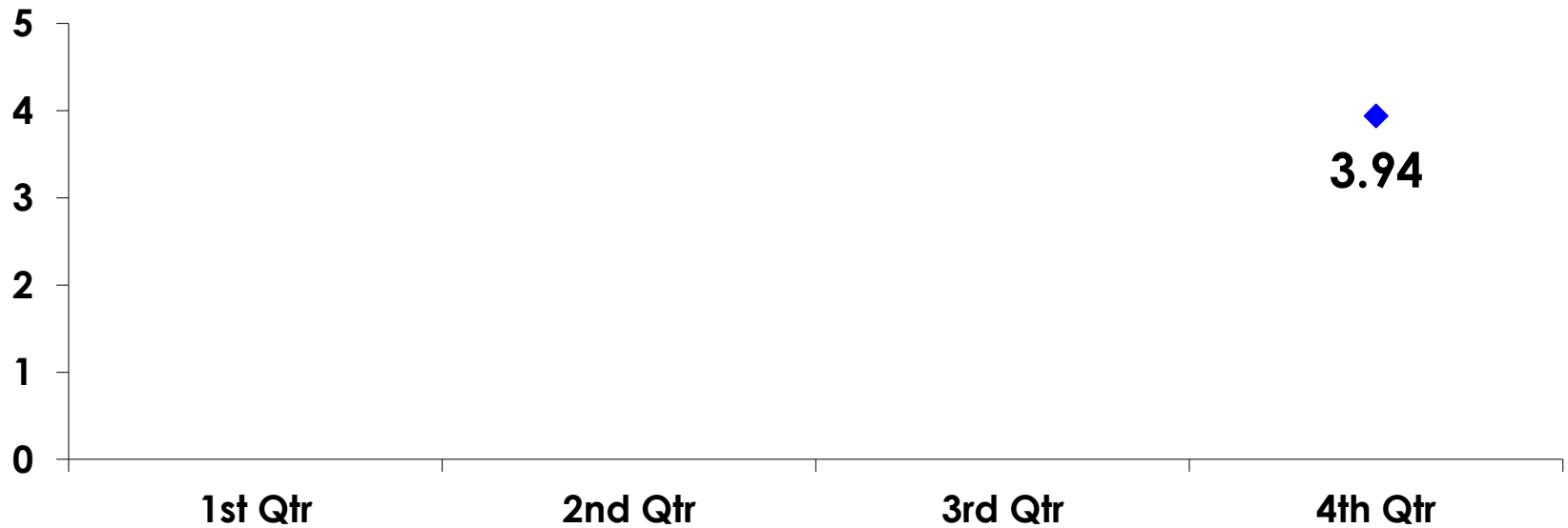


Length of Stay

Mean = 3.94 Days
Median = 4.0 Days



AVG LENGTH OF STAY

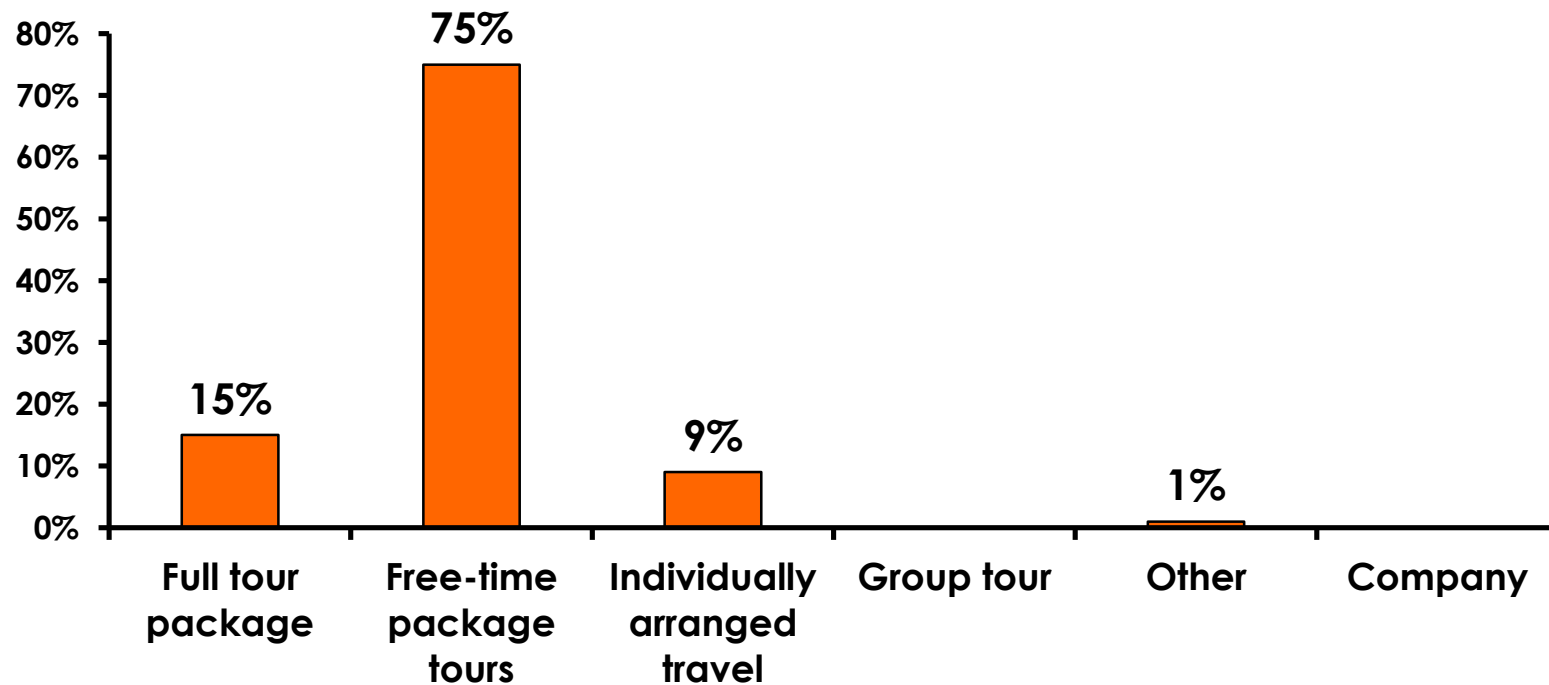


Occupation by Income

		TOTAL	Q26							
		-	<=CBY40K	CNY40K - CNY60K	CNY60K - CNY80K	CNY80K - CNY120K	CNY120K - CNY240K	CNY240K+	No Income	
Q25	Company: Office non-mgr	29%	100%	10%	25%	24%	33%	32%		
	Govt- Executive	22%			17%	35%	25%	29%		
	Other	8%		10%	17%		4%	11%		
	Retired	7%		30%	17%	6%				
	Prof-specialist	7%			17%	12%	13%			
	Freelancer	6%					13%	11%		
	Company: Salesperson	5%		30%		6%		4%		
	Student	4%				6%	4%		100%	
	Govt- Mgr/ Exec	4%		10%		6%		7%		
	Govt- Office non-mgr	4%					8%	7%		
	Skilled worker	3%		10%	8%	6%				
	Total	Count	99	2	10	12	17	24	28	1

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

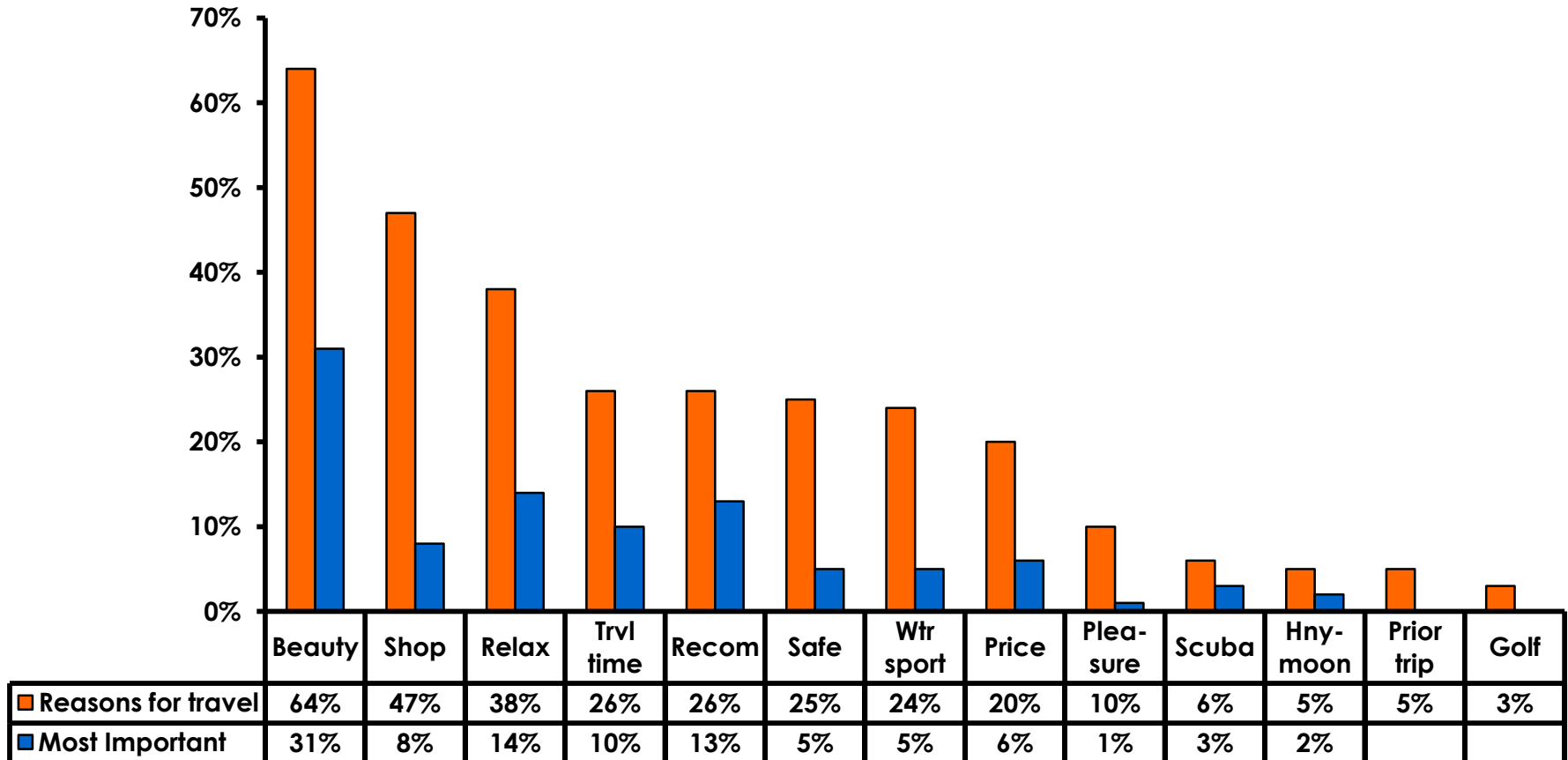


Accommodation by Income

Average length of stay: 3.94 days

		TOTAL	Q26							
		-	<=CBY40K	CNY40K - CNY60K	CNY60K - CNY80K	CNY80K - CNY120K	CNY120K - CNY240K	CNY240K+	No Income	
Q9	Hilton Guam Resort	51%		64%	33%	41%	63%	54%	100%	
	Holiday Resort Guam	15%	50%	9%	25%	18%	8%	7%		
	Guam Reef & Olive Spa Resort	13%		9%		6%	13%	29%		
	Hotel Nikko Guam	12%	50%	9%	25%	18%	13%	4%		
	Guam Plaza Hotel	4%			8%	18%				
	Royal Orchid Guam	2%			8%		4%			
	Home stay/ friend/ relative	1%		9%						
	Westin Resort Guam	1%						4%		
	Hyatt Regency Guam	1%						4%		
	Total	Count	101	2	11	12	17	24	28	1

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
 - Relaxing atmosphere and
 - Recommendations
- are the primary reasons for visiting during this period.

Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty	64%	43%	69%	71%	33%	67%	59%	
	Shopping	47%	43%	64%	39%	17%	48%	46%	
	Relax	38%	43%	40%	39%	25%	34%	44%	
	Short travel time	26%	14%	33%	29%		30%	22%	
	Recomm- friend/family/trvl agnt	26%	43%	24%	20%	50%	23%	32%	
	Safe	25%	29%	19%	34%	17%	30%	20%	
	Water sports	24%	14%	33%	22%		23%	24%	
	Price	20%	14%	19%	27%		23%	15%	
	Pleasure	10%	43%	14%	2%		10%	10%	
	Scuba	6%	14%	7%	5%		5%	7%	
	Honeymoon	5%	14%	10%			3%	7%	
	Previous trip	5%		5%	5%	8%	5%	5%	
	Golf	3%		5%	2%		2%	5%	
	No visa requirement	2%		2%	2%		2%	2%	
	Other	1%		2%				2%	
	Married/ Attn wedding	1%		2%				2%	
	Company/ Business Trip	1%		2%			2%		
	Total	Count	102	7	42	41	12	61	41

Motivation by Income

	TOTAL	Q26							
		-	<=CBY40K	CNY40K - CNY60K	CNY60K - CNY80K	CNY80K - CNY120K	CNY120K - CNY240K	CNY240K+	No Income
Q5A Natural beauty	64%	50%	64%	75%	41%	71%	68%		
Shopping	47%		55%	50%	29%	67%	43%		
Relax	38%	50%	27%	42%	24%	42%	46%	100%	
Short travel time	26%		27%	17%	6%	25%	39%		
Recomm- friend/family/trvl agnt	26%	50%	36%	17%	59%	13%	14%	100%	
Safe	25%		18%	33%	6%	8%	43%	100%	
Water sports	24%	50%	27%	33%	6%	33%	25%		
Price	20%		18%	17%		21%	39%		
Pleasure	10%		9%	8%	6%	8%	11%	100%	
Scuba	6%			8%		17%	4%		
Honeymoon	5%			25%		4%			
Previous trip	5%		9%		6%	4%	7%		
Golf	3%				6%		7%		
No visa requirement	2%					4%	4%		
Other	1%						4%		
Married/ Attn wedding	1%				6%				
Company/ Business Trip	1%				6%				
Total	Count	102	2	11	12	17	24	28	1

SECTION 3 **EXPENDITURES**

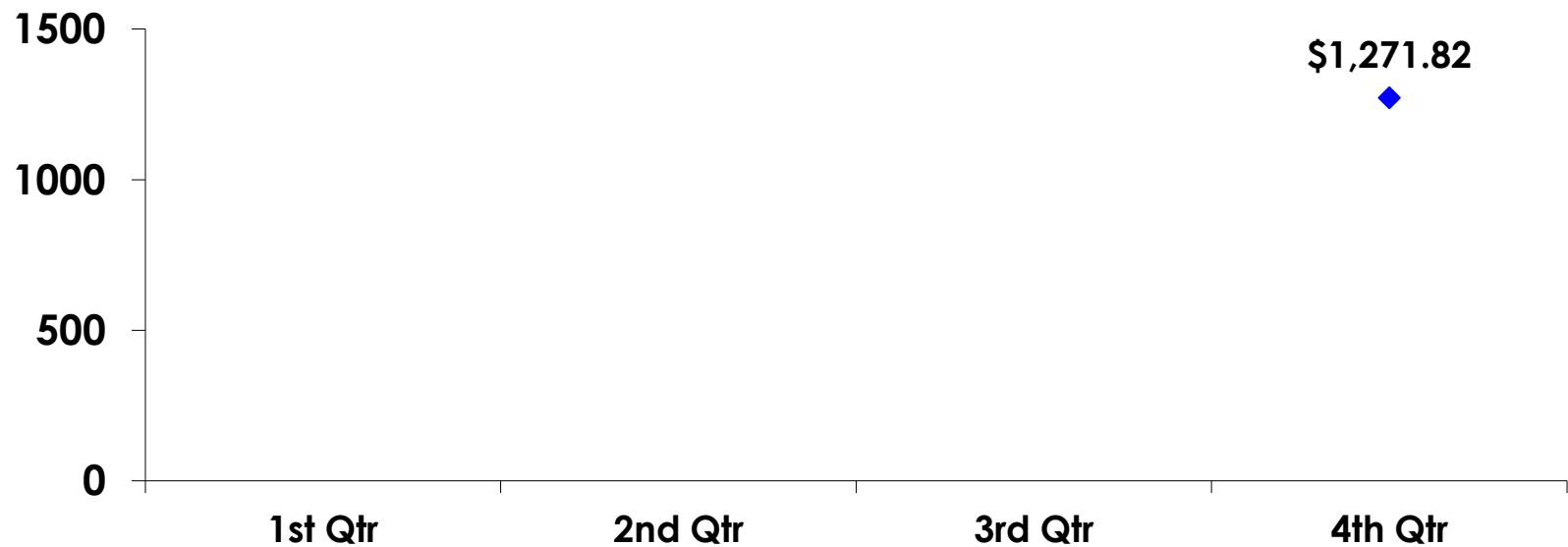
Prepaid Expenditures

Yuan 6.15/US\$1

- \$2,069.34 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$16,260 = maximum (highest amount recorded for the entire sample)
- \$1,271.82 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$1,271.82

Breakdown of Prepaid Expenditures

Yuan 6.15=\$1

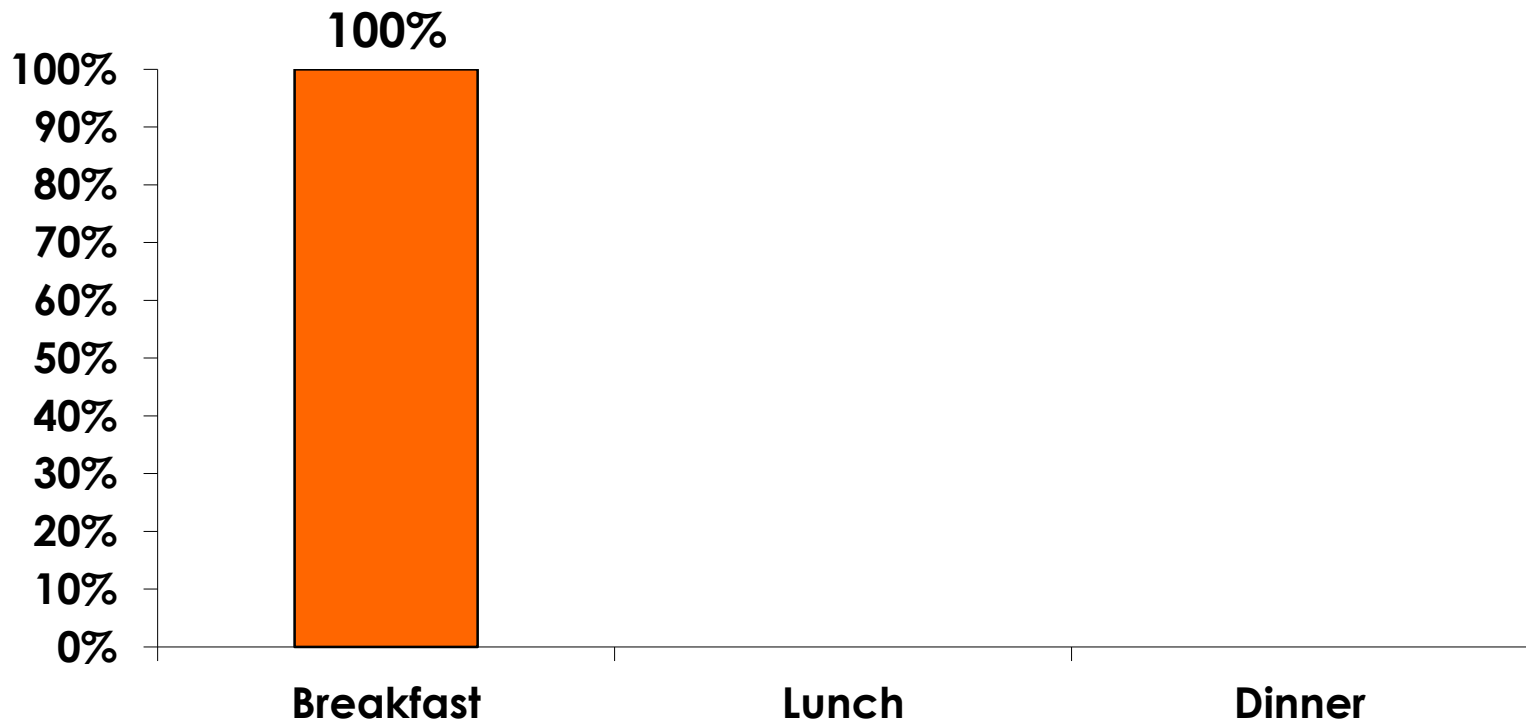
**(Filter: Only those who responded/
Per Travel Party)**

	MEAN \$
Air & Accommodation package only	\$2,837.76
Air & Accommodation w/ daily meal package	\$2,101.76
Air only	\$731.71
Accommodation only	\$487.80
Accommodation w/ daily meal only	\$975.61
Food & Beverages in Hotel	\$170.73
Ground transportation – China	\$81.30
Ground transportation – Guam	\$162.60
Optional tours/ activities	\$243.90
U.S. Visa Application	\$294.31
Other expenses	\$1,249.94
Total Prepaid	\$2,069.34

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n= 2

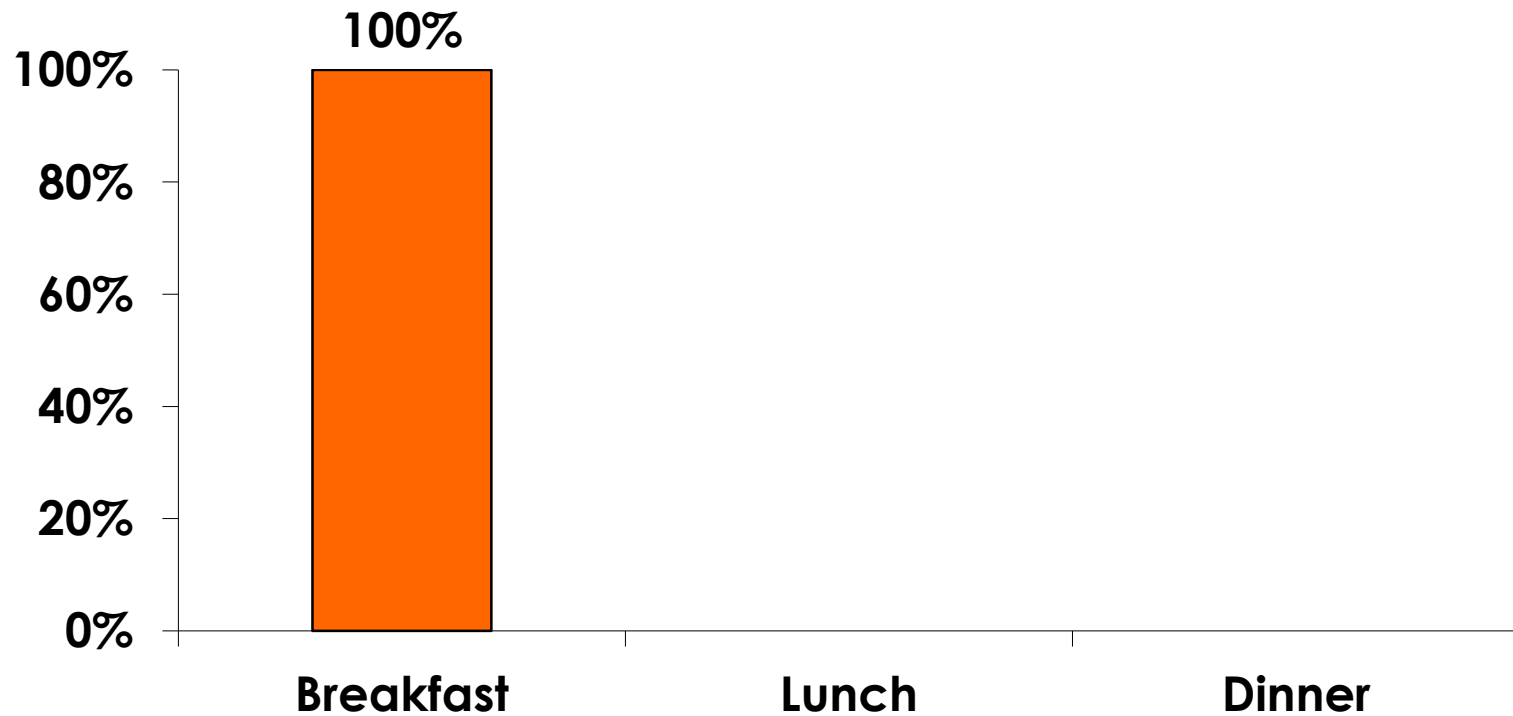


Mean=\$2,101.76 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

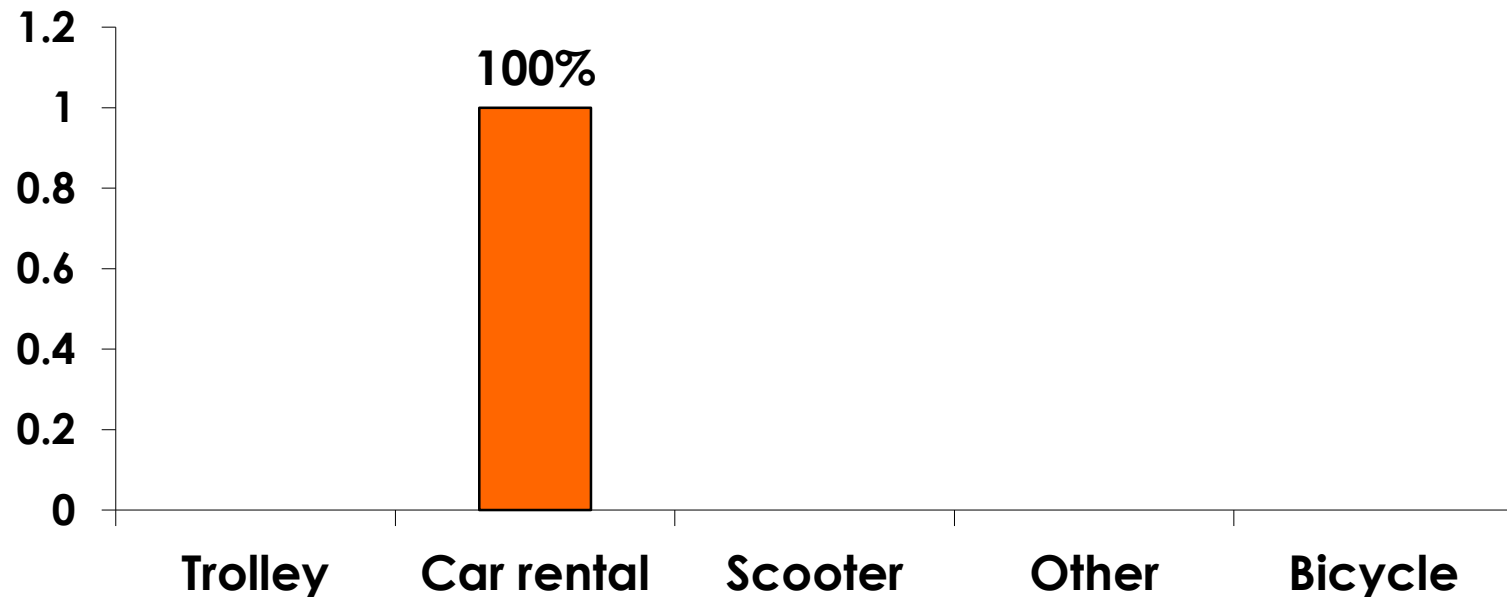
n= 2



Mean=\$975.61 per travel party

PREPAID GROUND TRANSPORTATION

n= 1



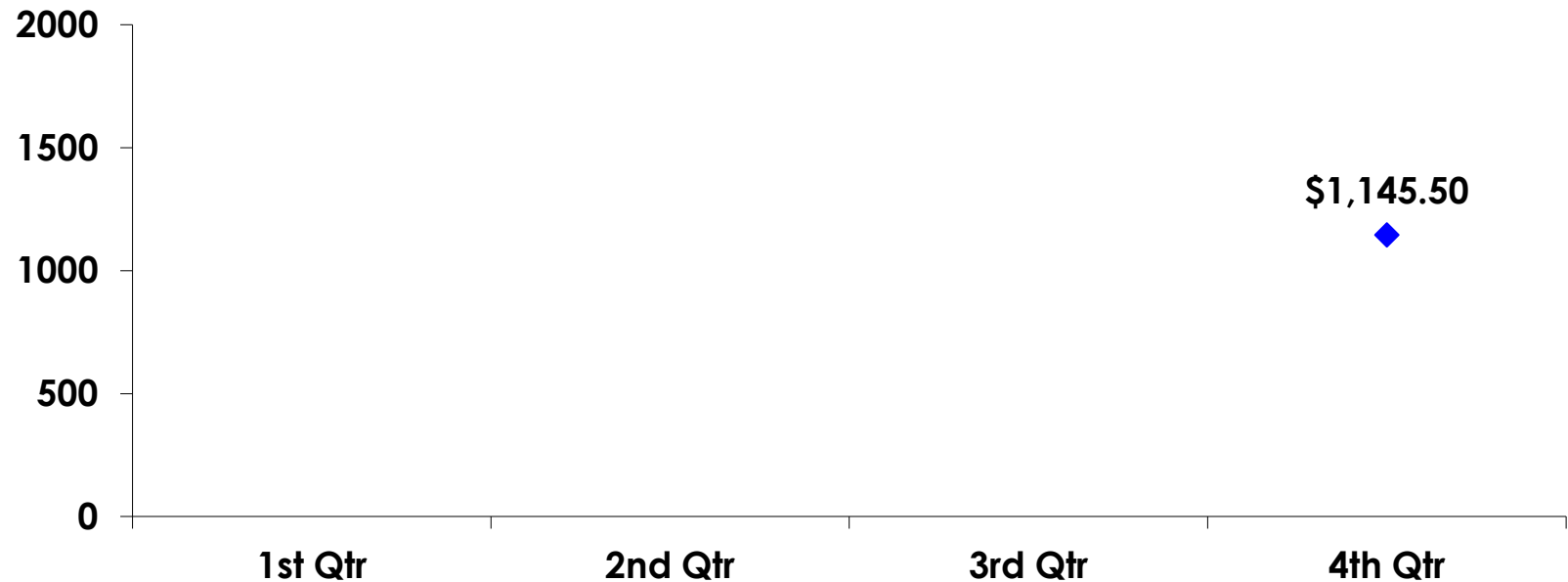
Mean=\$162.60 per travel party

On-Island Expenditures

- \$1,844.95 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,000 = Maximum (highest amount recorded for the entire sample)
- \$1,145.50 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

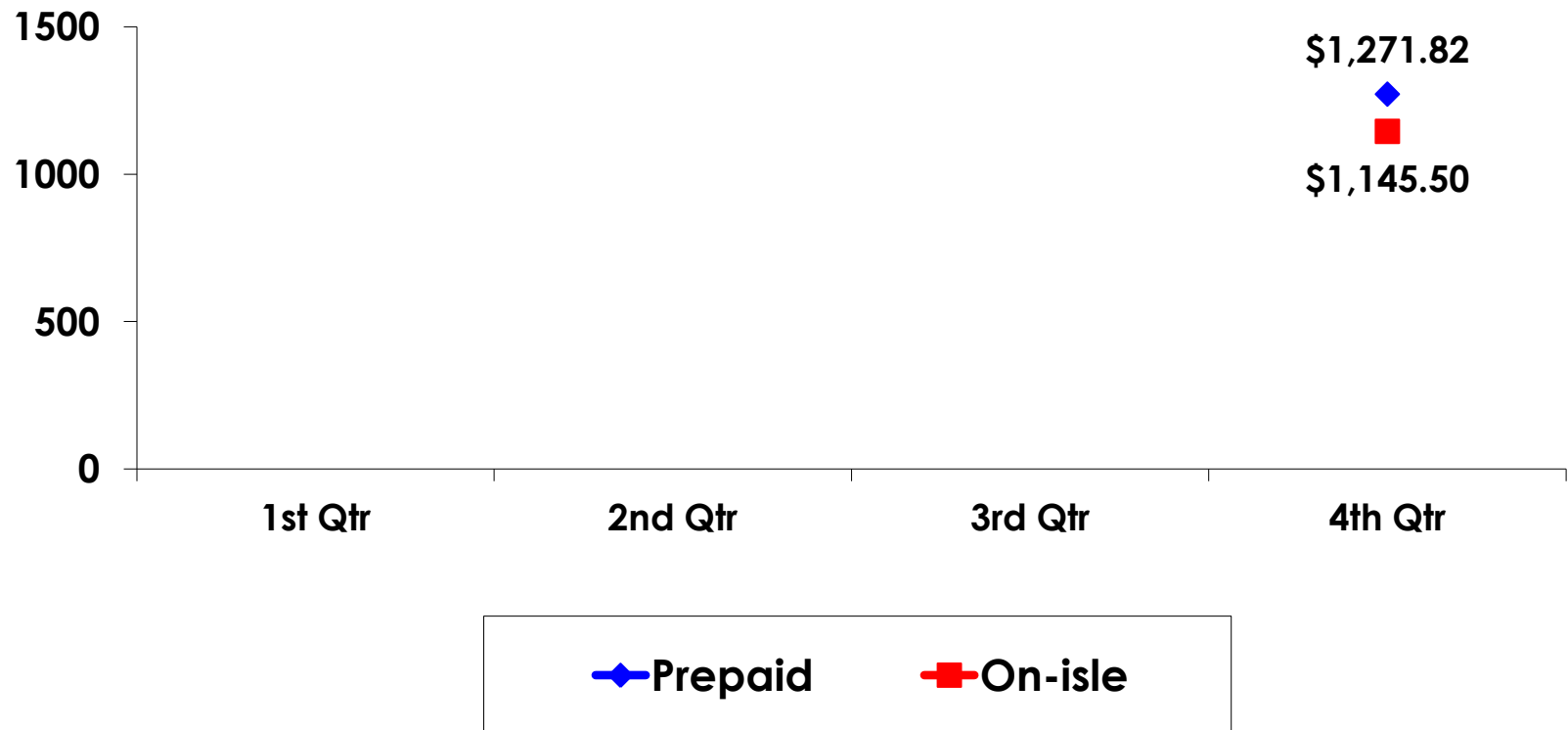
Per Person



YTD = \$1,450.50

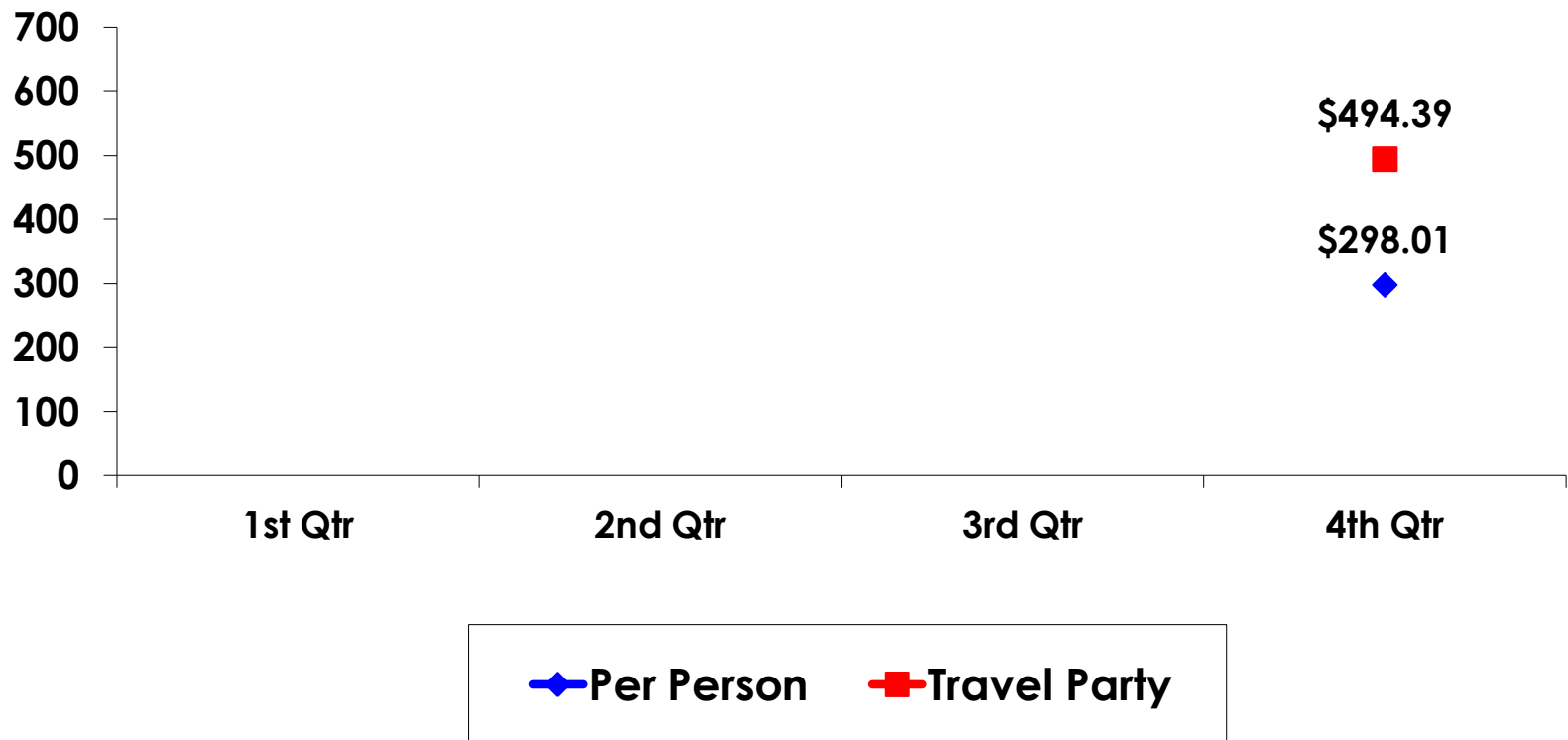
PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$1,271.82 On-Isle YTD = \$1,145.50



ON-ISLE EXPENDITURES – Per DAY

Per Person YTD= \$298.01 Travel Party YTD= \$494.39



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
			-	Male	Female	Male				Female		
		AGE				AGE						
		18-24				25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$1,145.50	\$1,135.75	\$1,160.01	\$111.11	\$1,085.48	\$1,301.45	\$984.69	\$1,750.00	\$1,177.97	\$814.50	\$1,300.00
	Median	\$1,000	\$933	\$1,000	\$0	\$1,082	\$1,000	\$800	\$2,000	\$1,125	\$775	\$1,000
	Minimum	\$0	\$0	\$0	\$0	\$100	\$70	\$143	\$0	\$0	\$0	\$0
	Maximum	\$5,500	\$5,500	\$4,000	\$333	\$2,300	\$5,500	\$2,000	\$3,000	\$2,500	\$2,000	\$4,000

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$25.23	\$29.16	\$19.37	\$0.00	\$23.55	\$38.63	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$35.88	\$42.46	\$26.10	\$14.29	\$48.57	\$37.07	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$82.51	\$90.43	\$70.73	\$57.14	\$100.95	\$92.10	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$113.19	\$124.10	\$96.95	\$64.29	\$159.40	\$107.32	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$159.61	\$164.92	\$151.71	\$142.86	\$180.48	\$187.80	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- OTHER	Mean	\$145.44	\$140.98	\$152.07	\$142.86	\$191.31	\$92.68	\$166.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TRANS	Mean	\$39.37	\$45.52	\$30.22	\$7.14	\$55.50	\$39.88	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$1,245.78	\$1,236.57	\$1,259.49	\$1,000.00	\$1,119.76	\$1,330.24	\$1,541.67
	Median	\$750	\$1,000	\$600	\$0	\$650	\$600	\$1,000
TOTAL	Mean	\$1,844.95	\$1,870.70	\$1,806.63	\$1,428.57	\$1,879.52	\$1,920.61	\$1,708.33
	Median	\$1,500	\$1,500	\$1,500	\$1,000	\$1,500	\$1,800	\$1,500

On-Island Expenditures

First Timers & Repeaters

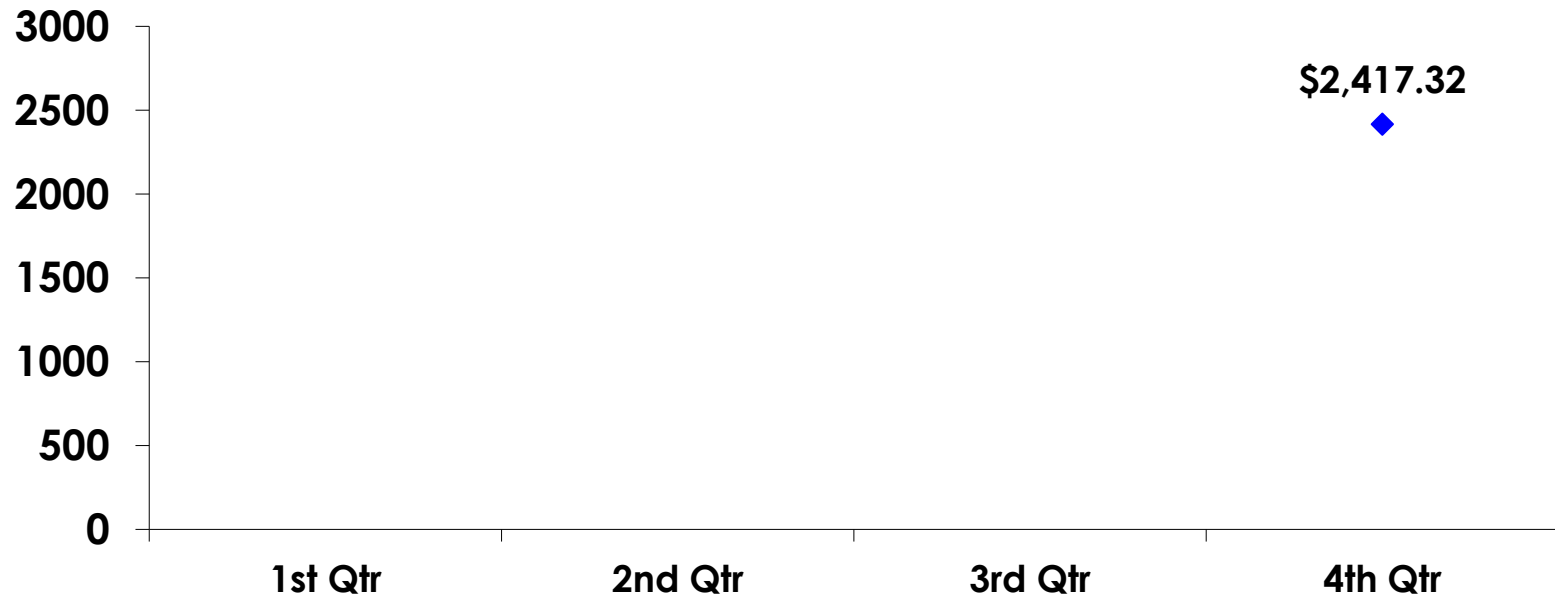
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$25.23	\$22.84	\$77.78
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$35.88	\$43.41	\$11.11
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$82.51	\$74.59	\$255.56
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$113.19	\$112.20	\$116.11
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$159.61	\$196.10	\$22.22
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$145.44	\$147.99	\$277.78
	Median	\$0	\$0	\$0
TRANS	Mean	\$39.37	\$38.85	\$92.22
	Median	\$0	\$0	\$0
OTHER	Mean	\$1,245.78	\$1,204.21	\$980.56
	Median	\$750	\$650	\$300
TOTAL	Mean	\$1,844.95	\$1,837.62	\$1,833.33
	Median	\$1,500	\$1,500	\$2,000

Total Expenditures Per Person (Prepaid & On-Island)

- \$2,417.32 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$18,260 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES

Per Person



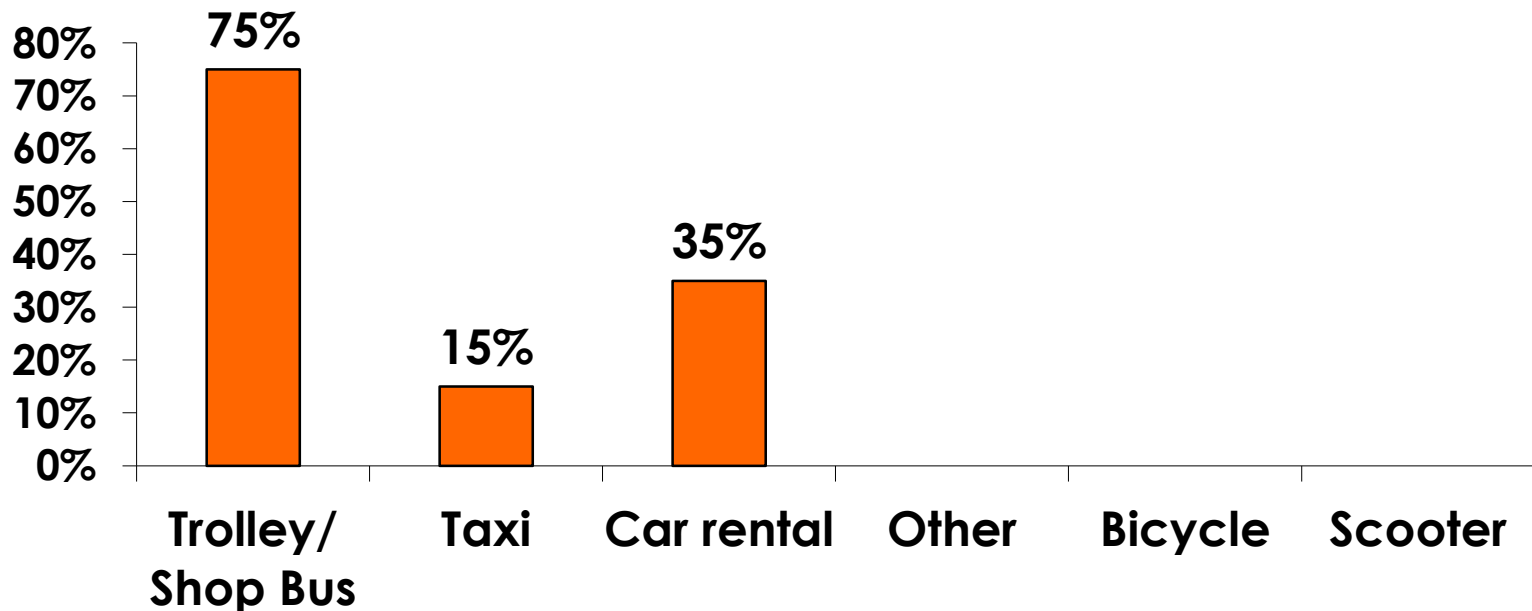
YTD=\$2,417.32

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$25.23
Food & beverage in fast food restaurant/convenience store	\$35.88
Food & beverage at restaurants or drinking establishments outside a hotel	\$82.51
Optional tours and activities	\$113.19
Gifts/ souvenirs for yourself/companions	\$159.61
Gifts/ souvenirs for friends/family at home	\$145.44
Local transportation	\$39.37
Other expenses not covered	\$1,245.78
Average Total	\$1,844.95

Local Transportation

n= 20



Mean=\$39.37 per travel party

Guam Airport Expenditures

- \$152.00 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,500 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

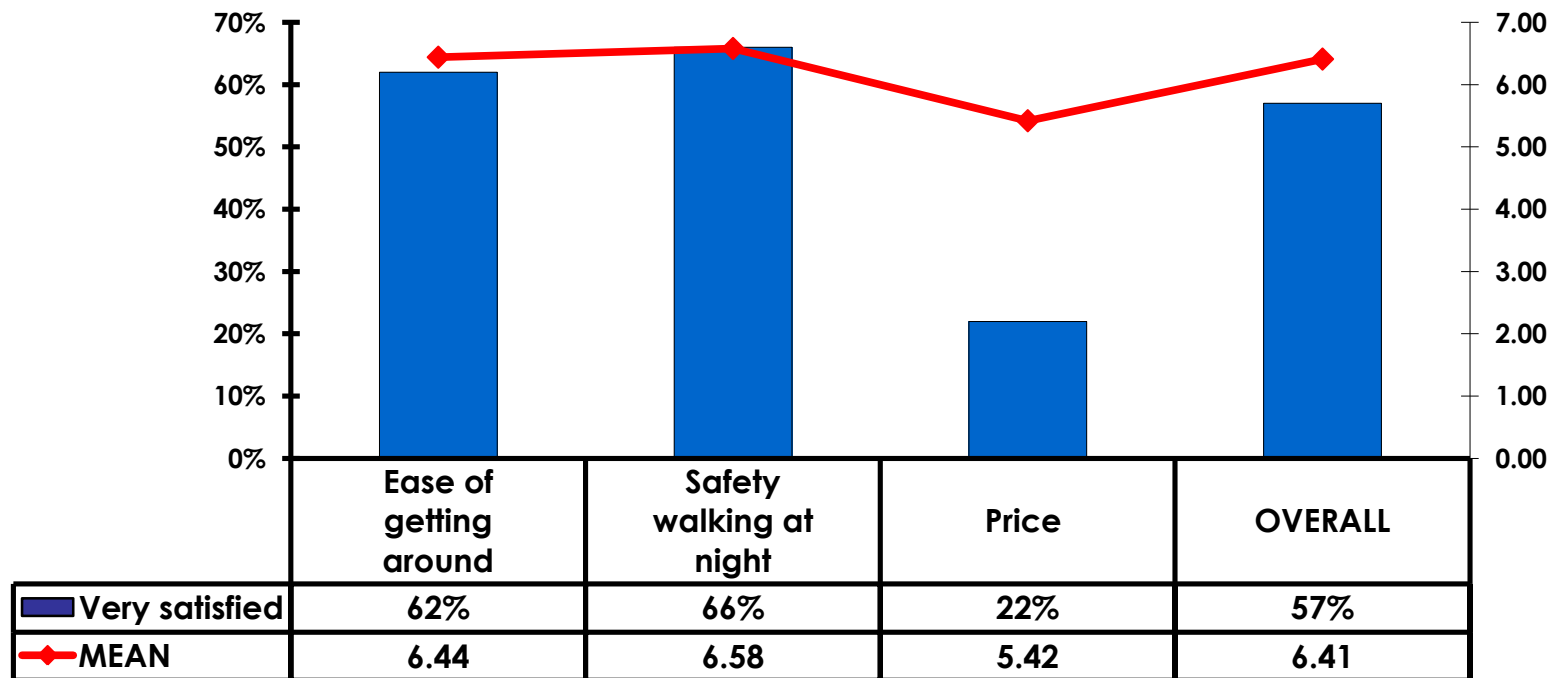
	MEAN \$
Food & Beverages	\$26.17
Gifts/Souvenirs Self	\$28.73
Gifts/Souvenirs Others	\$97.11
Total	\$152.00

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

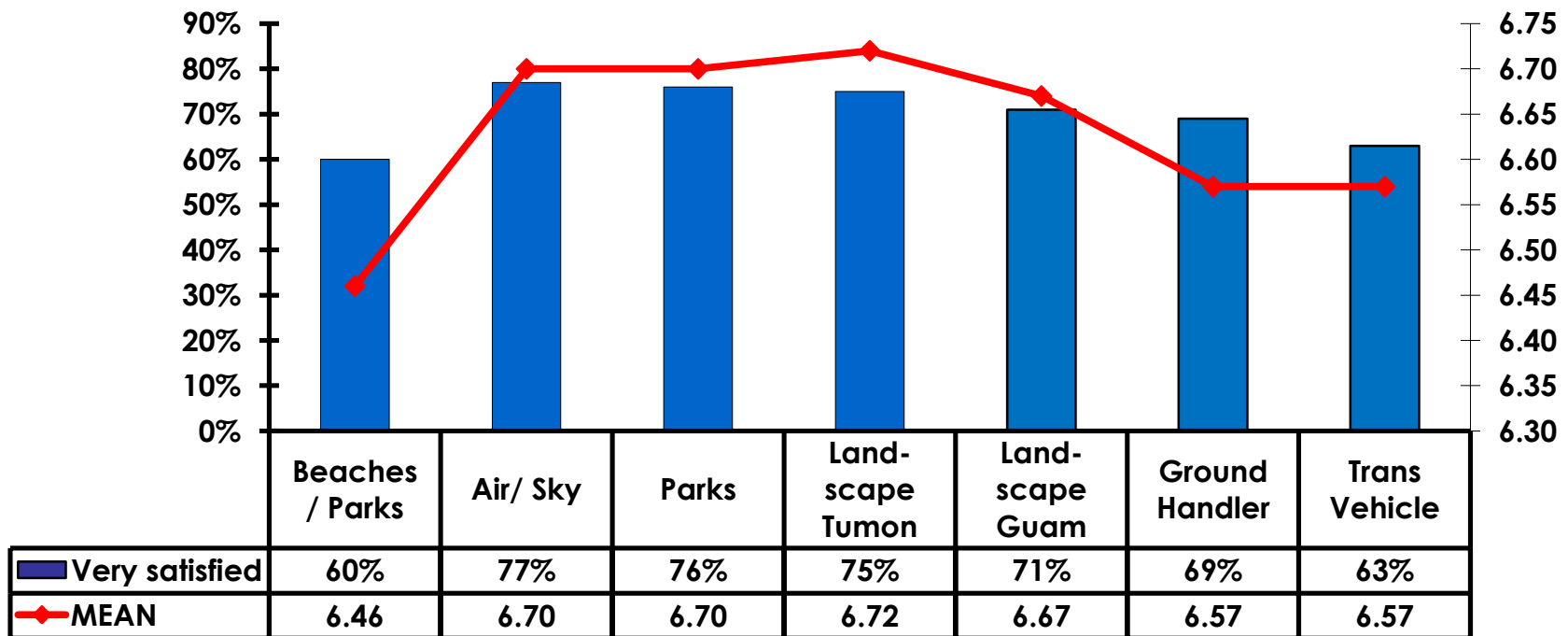
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

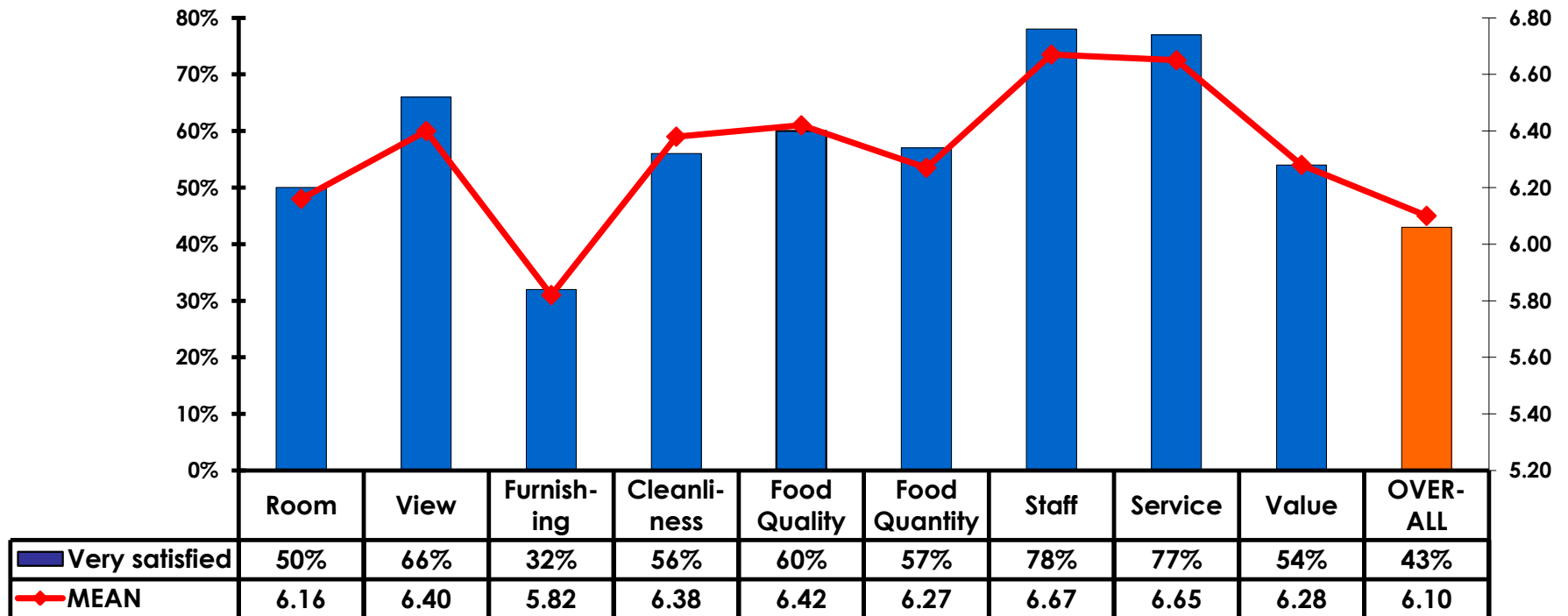
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

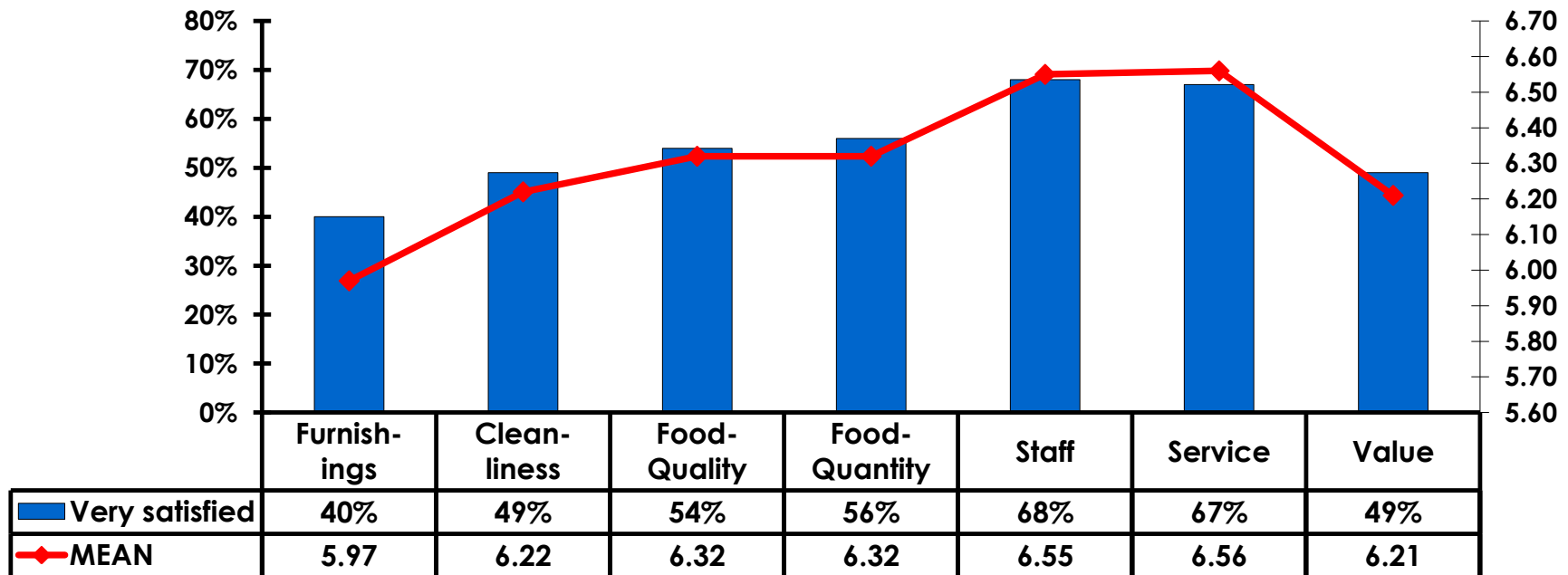
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

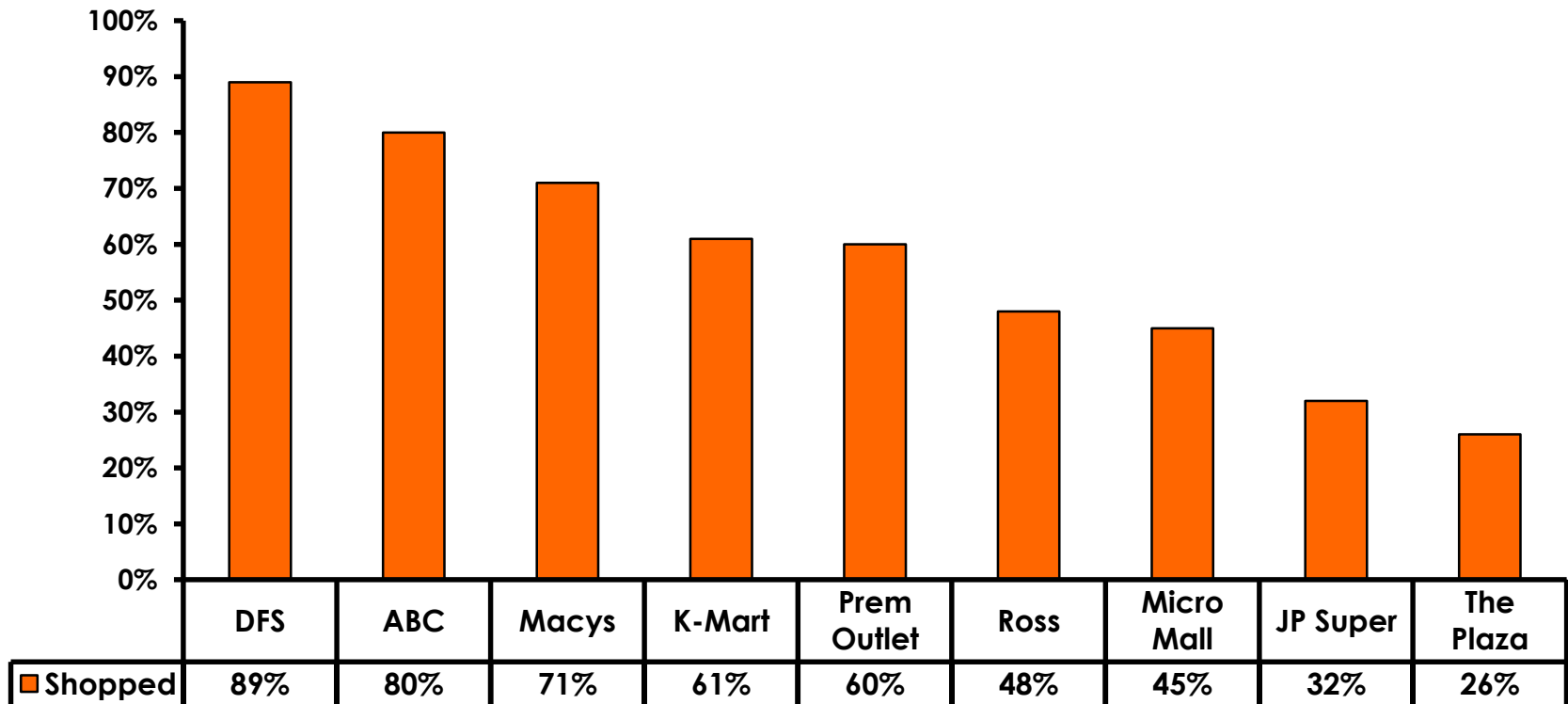
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

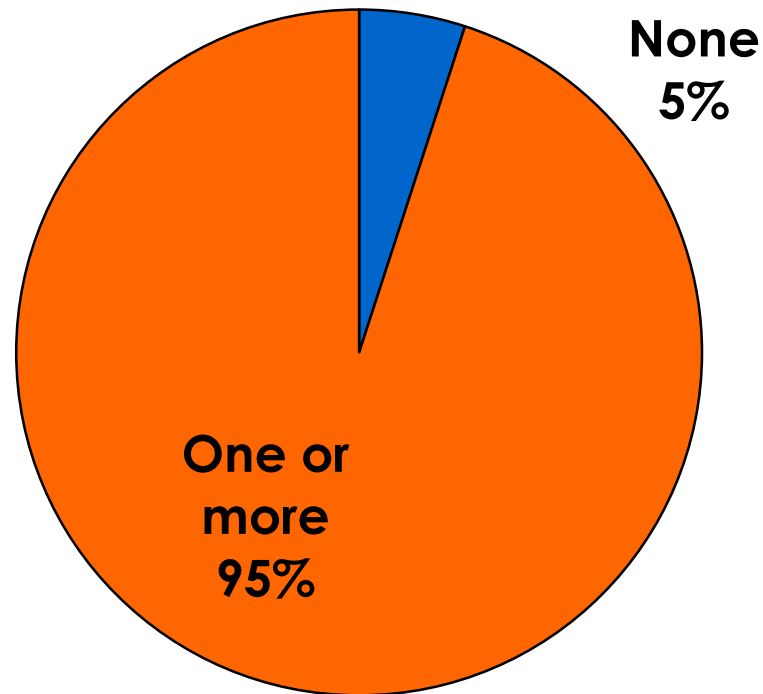
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

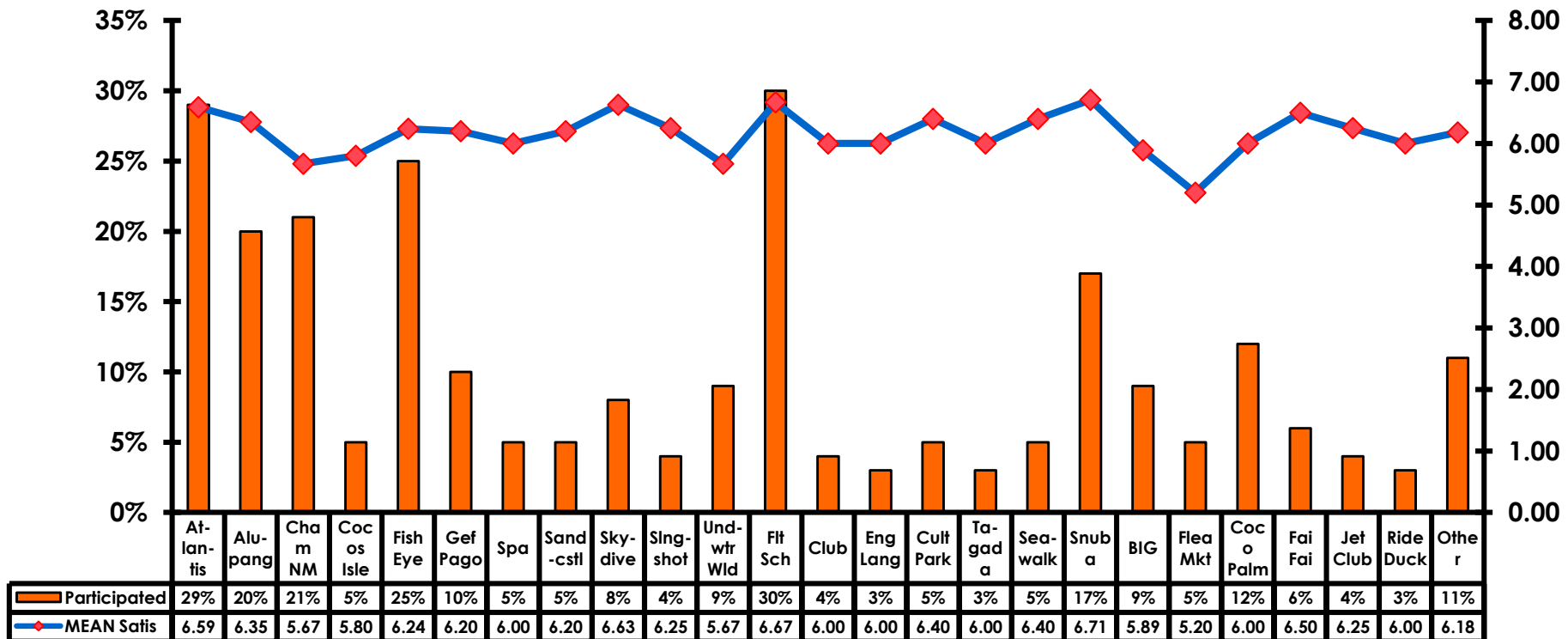
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 78%	Score of 6 to 7 = 72%
Score of 4 to 5 = 22%	Score of 4 to 5 = 29%
Score 1 to 3 = -%	Score 1 to 3 = -%
MEAN = 6.10	MEAN = 6.01

Optional Tour Participation

- Average number of tours participated in is 2.54



Optional Tours Participation & Satisfaction



Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 89%	Score of 6 to 7 = 83%
Score of 4 to 5 = 11%	Score of 4 to 5 = 16%
Score 1 to 3 = -%	Score 1 to 3 = 1%
MEAN = 6.44	MEAN = 6.26

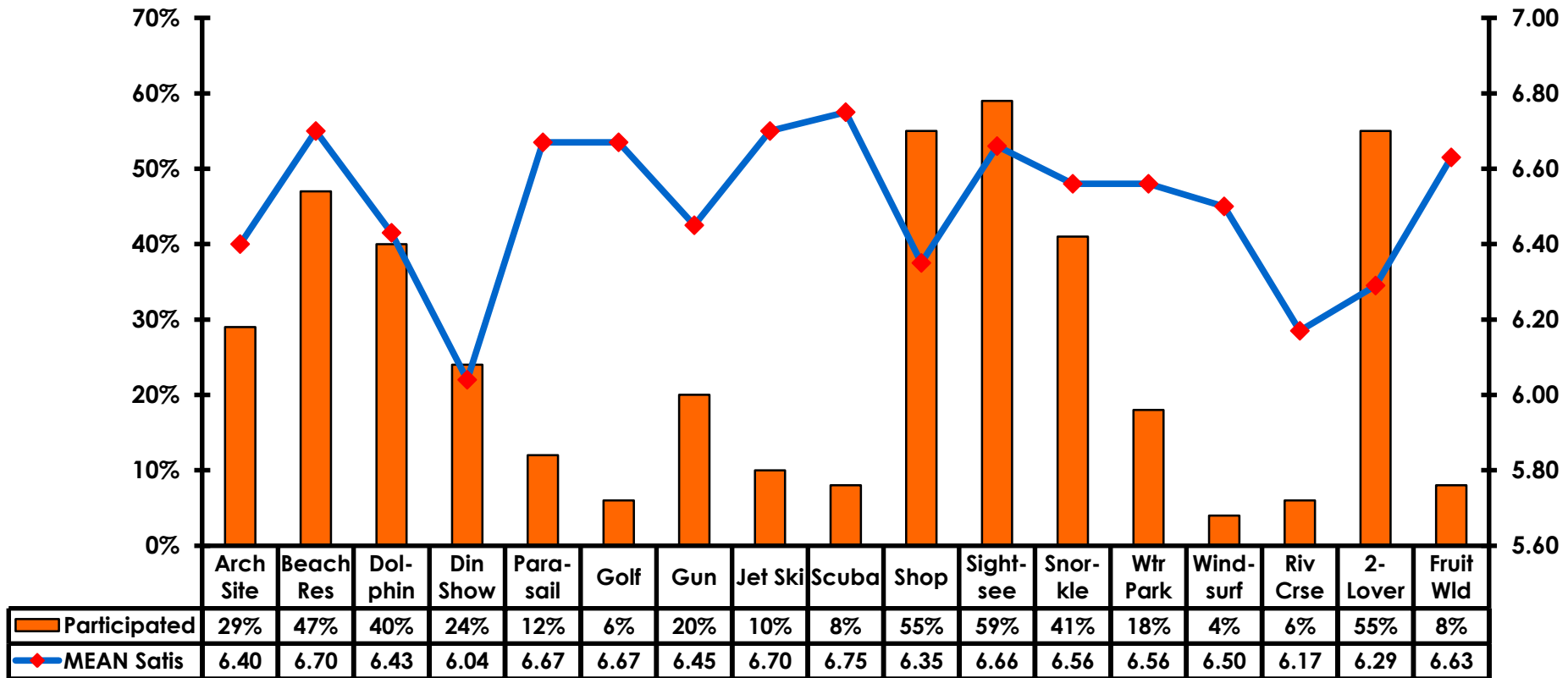
Night Tours Satisfaction

7pt Rating Scale

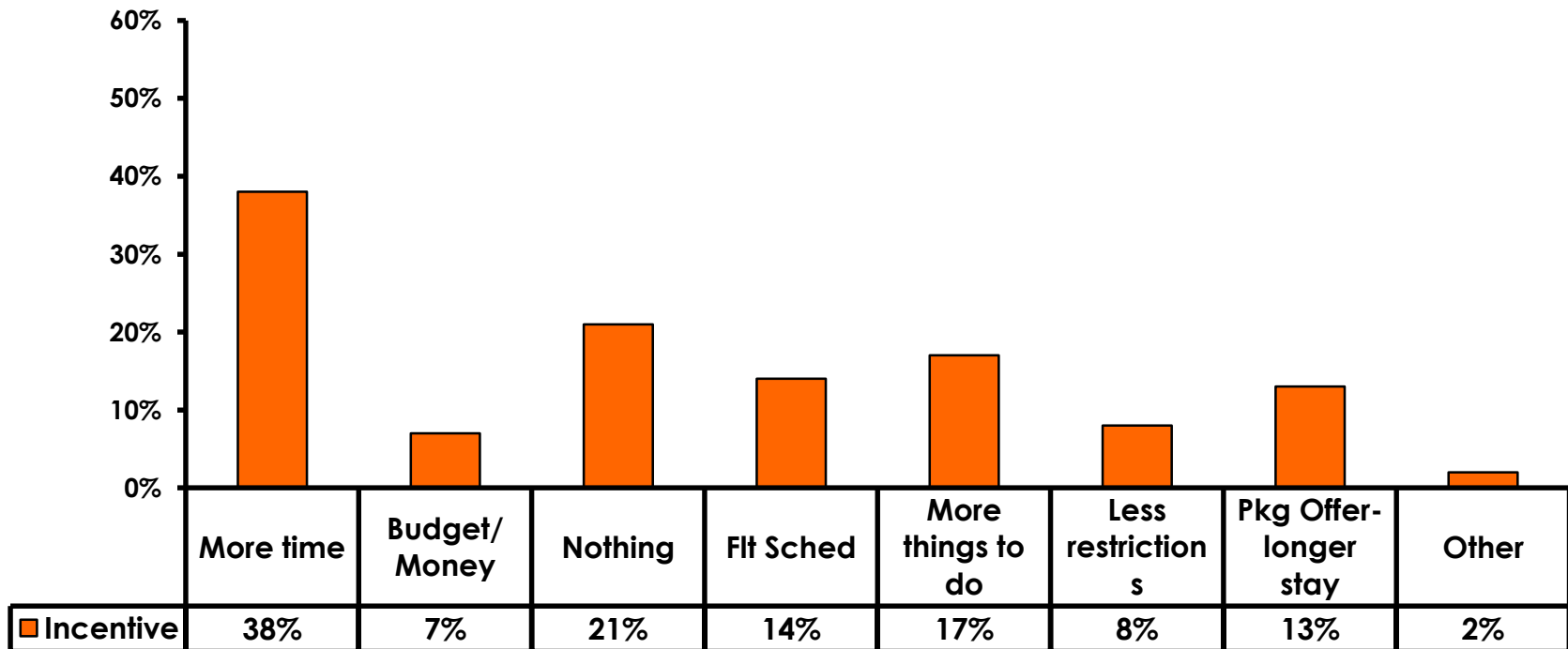
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 74%	Score of 6 to 7 = 67%
Score of 4 to 5 = 25%	Score of 4 to 5 = 31%
Score 1 to 3 = 1%	Score 1 to 3 = 2%
MEAN = 6.01	MEAN = 5.85

Satisfaction with Other Activities



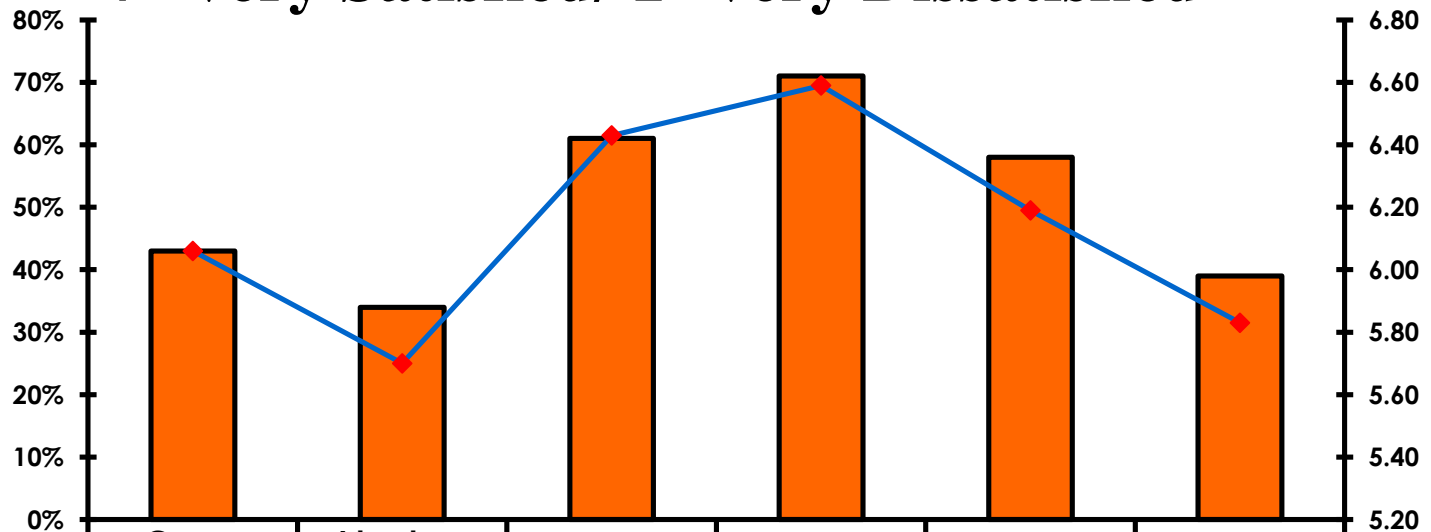
What would it take to make you want to stay an extra day in Guam?





On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

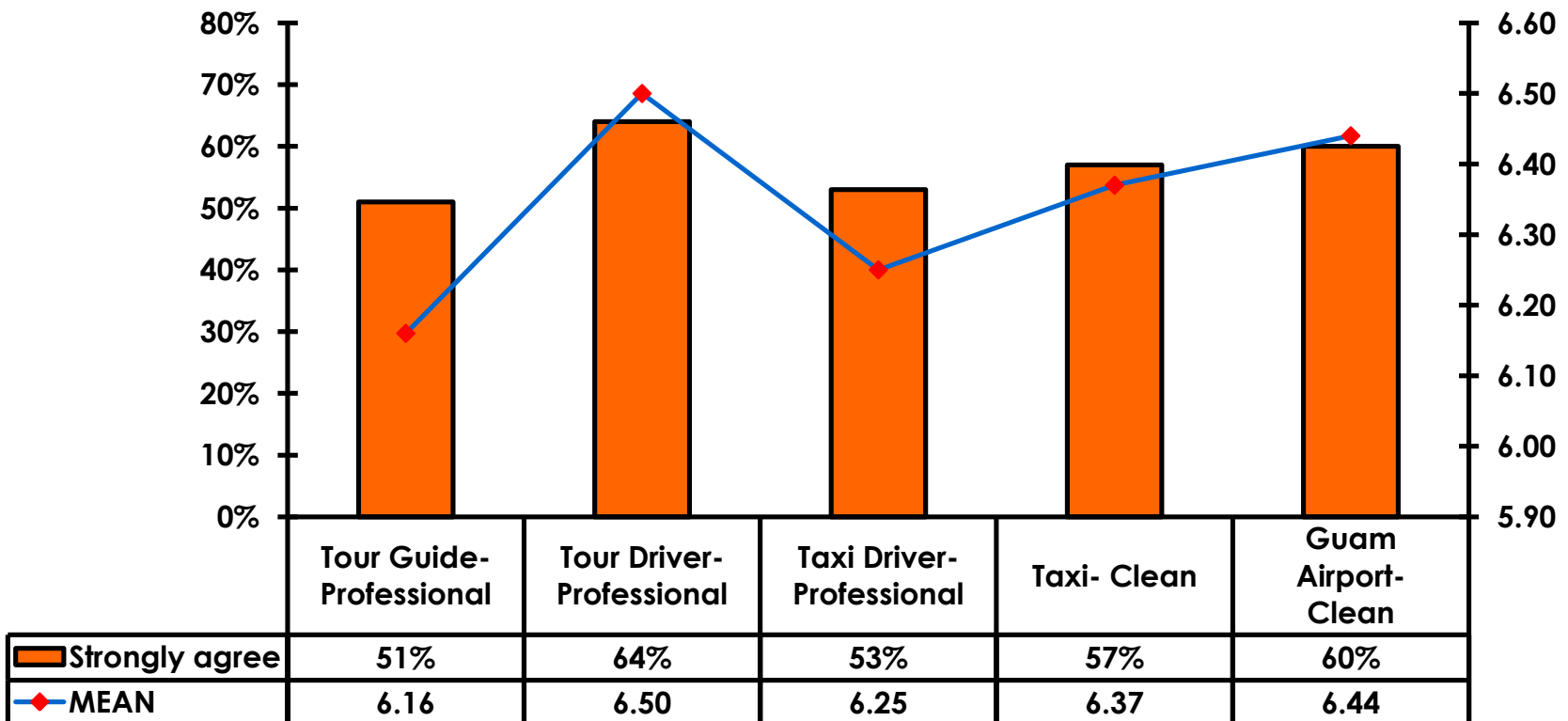


 Strongly agree	43%	34%	61%	71%	58%	39%
 MEAN	6.06	5.70	6.43	6.59	6.19	5.83

On-Island Perceptions

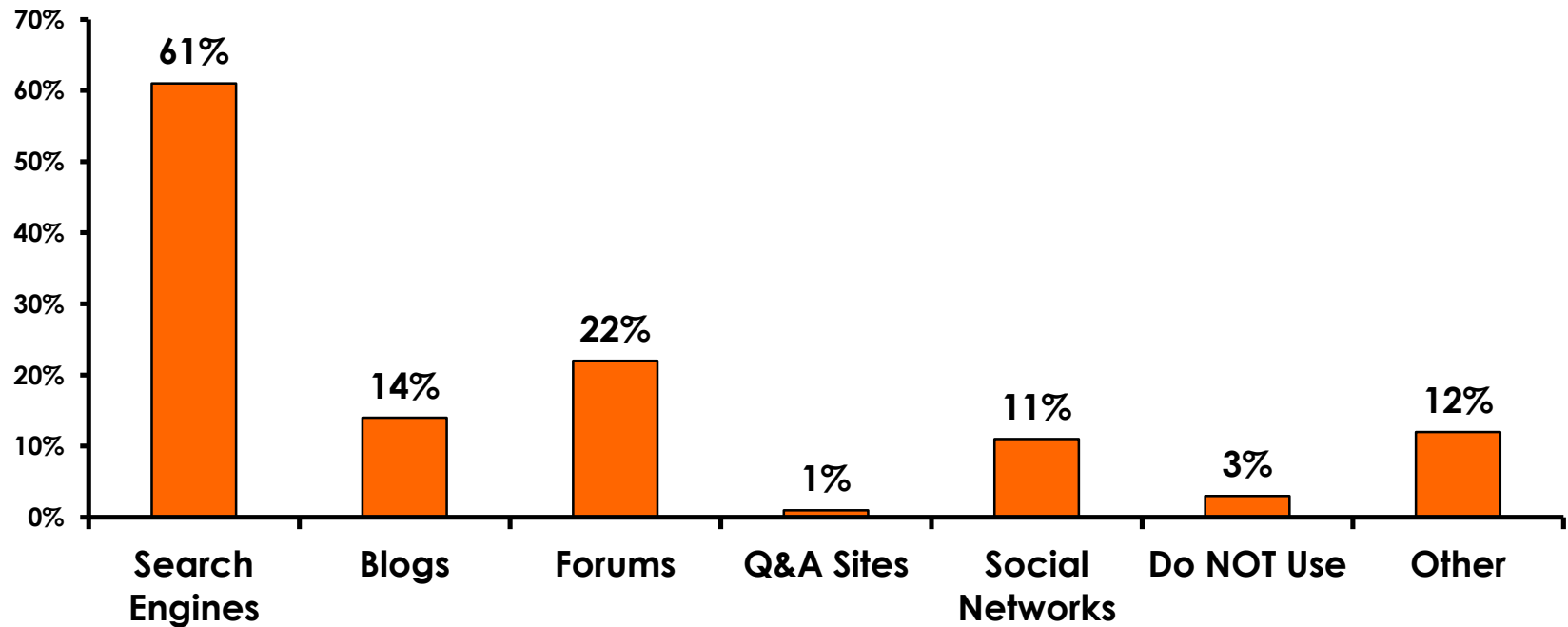
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



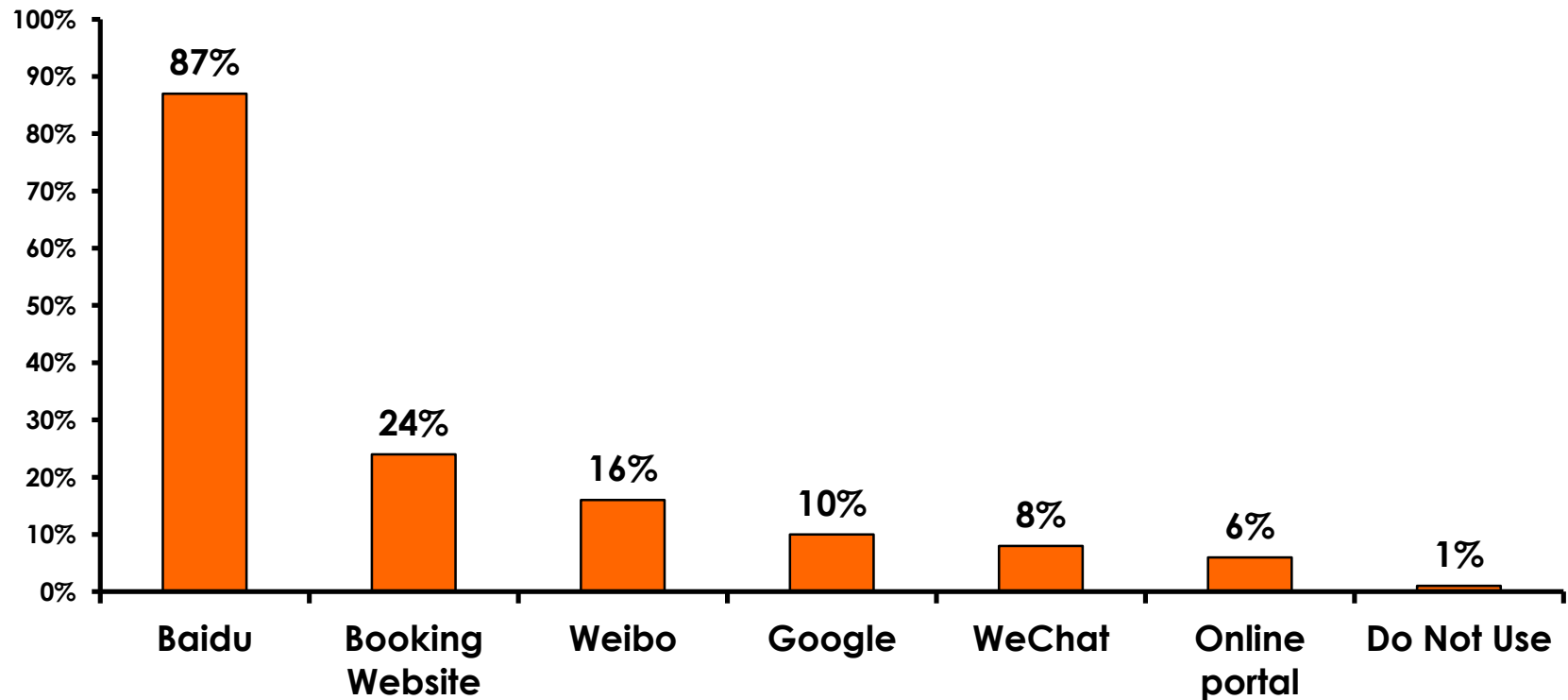
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

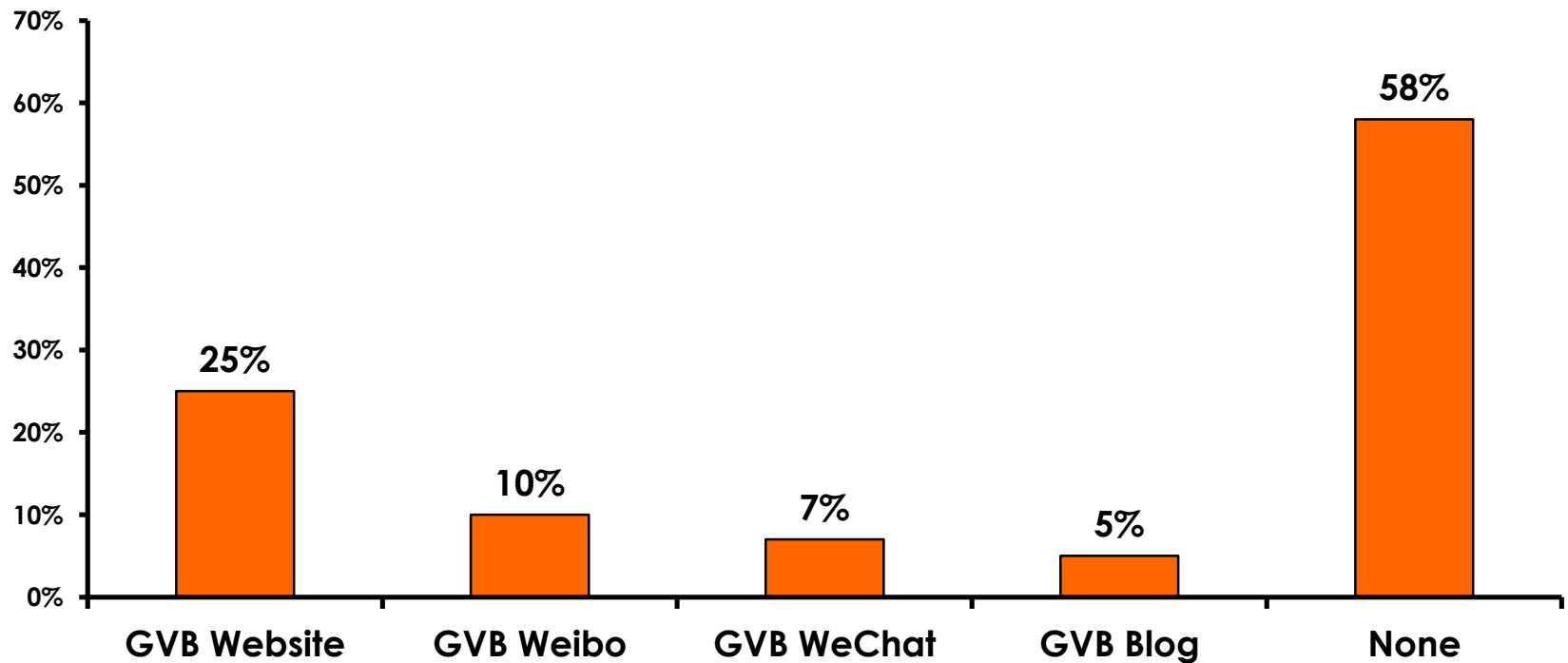


Internet- Things To Do

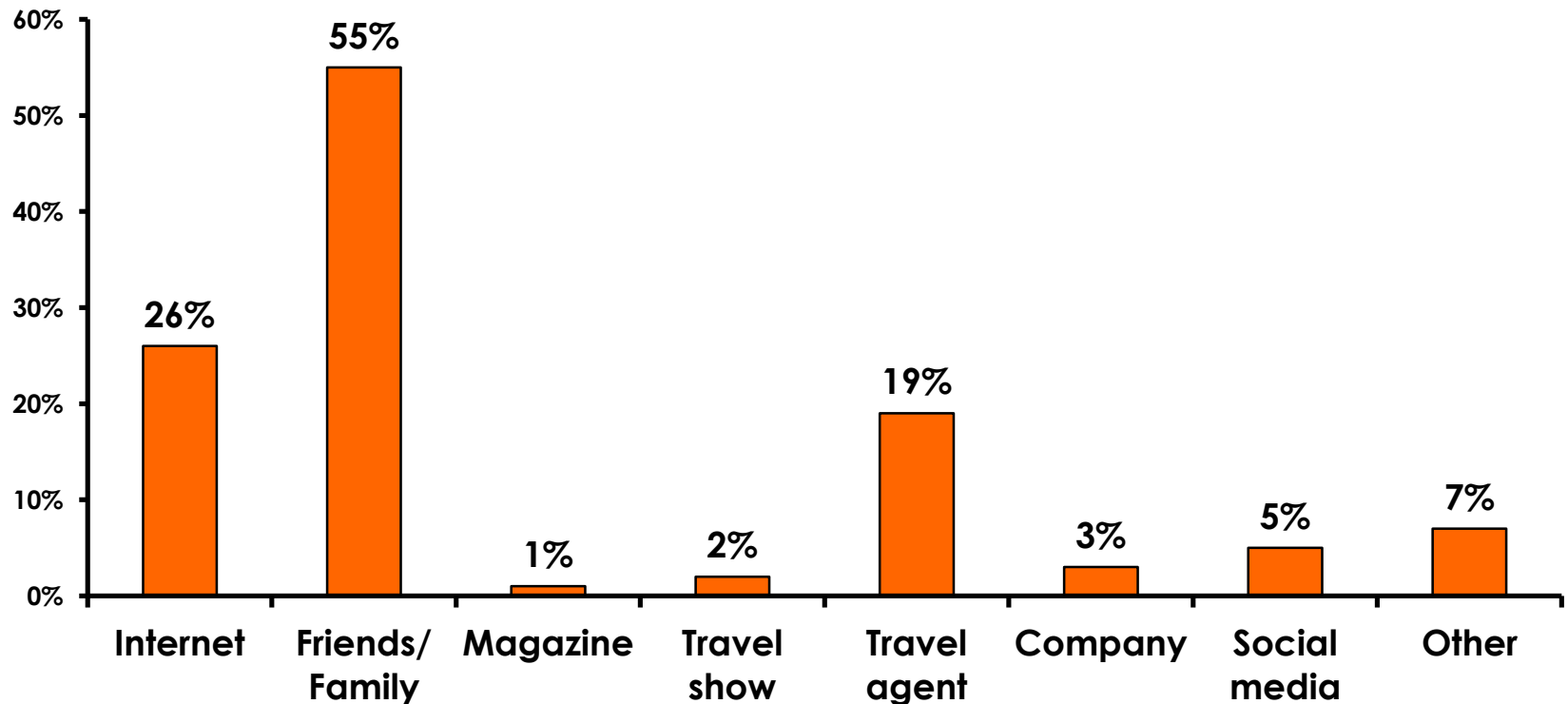
Sources of Info



Internet- GVB Sources

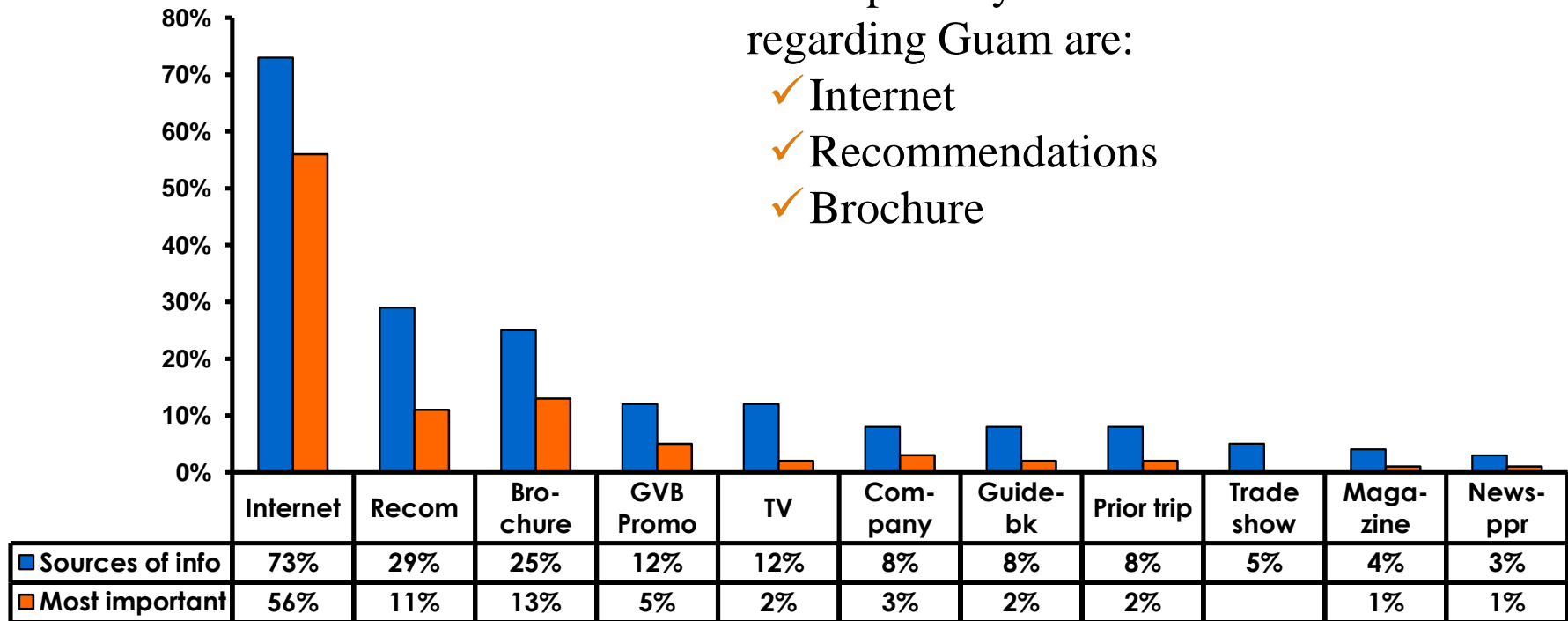


Travel Motivation- Info Sources



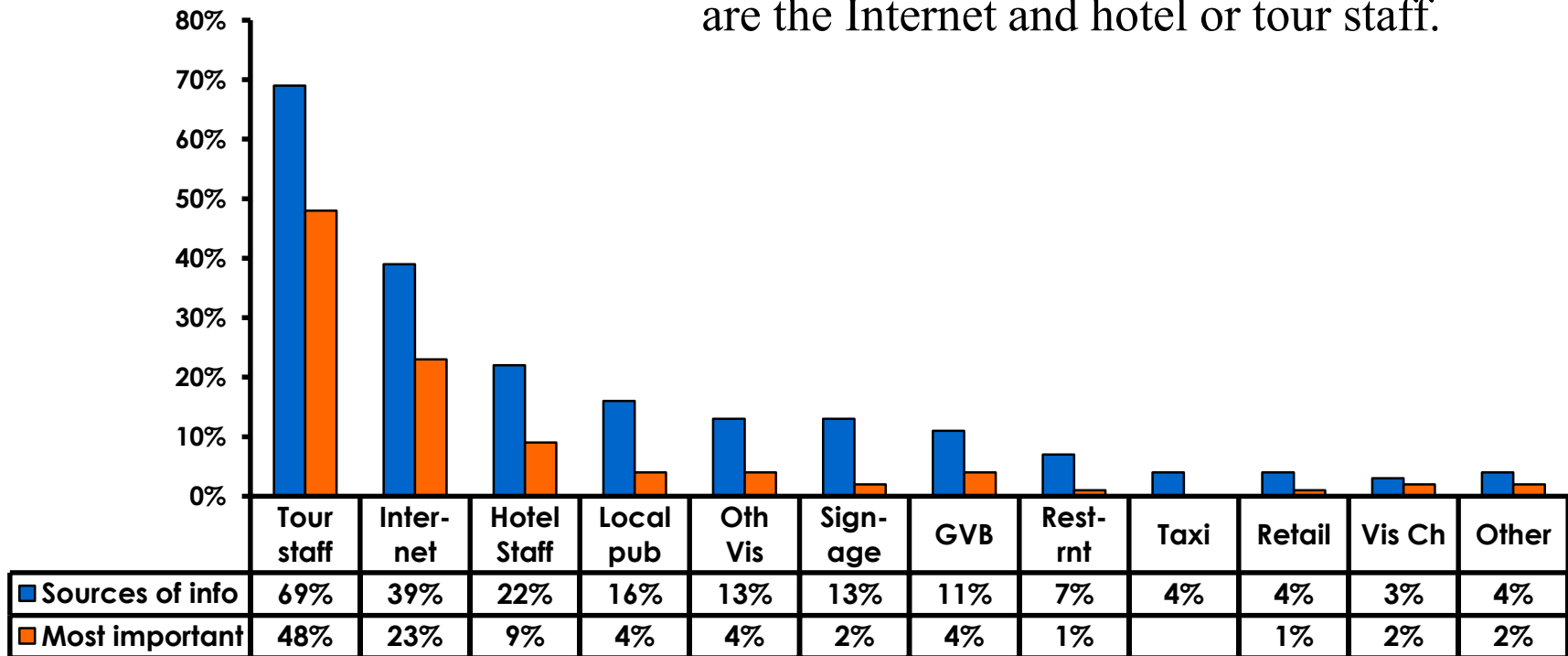
Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
 - ✓ Internet
 - ✓ Recommendations
 - ✓ Brochure



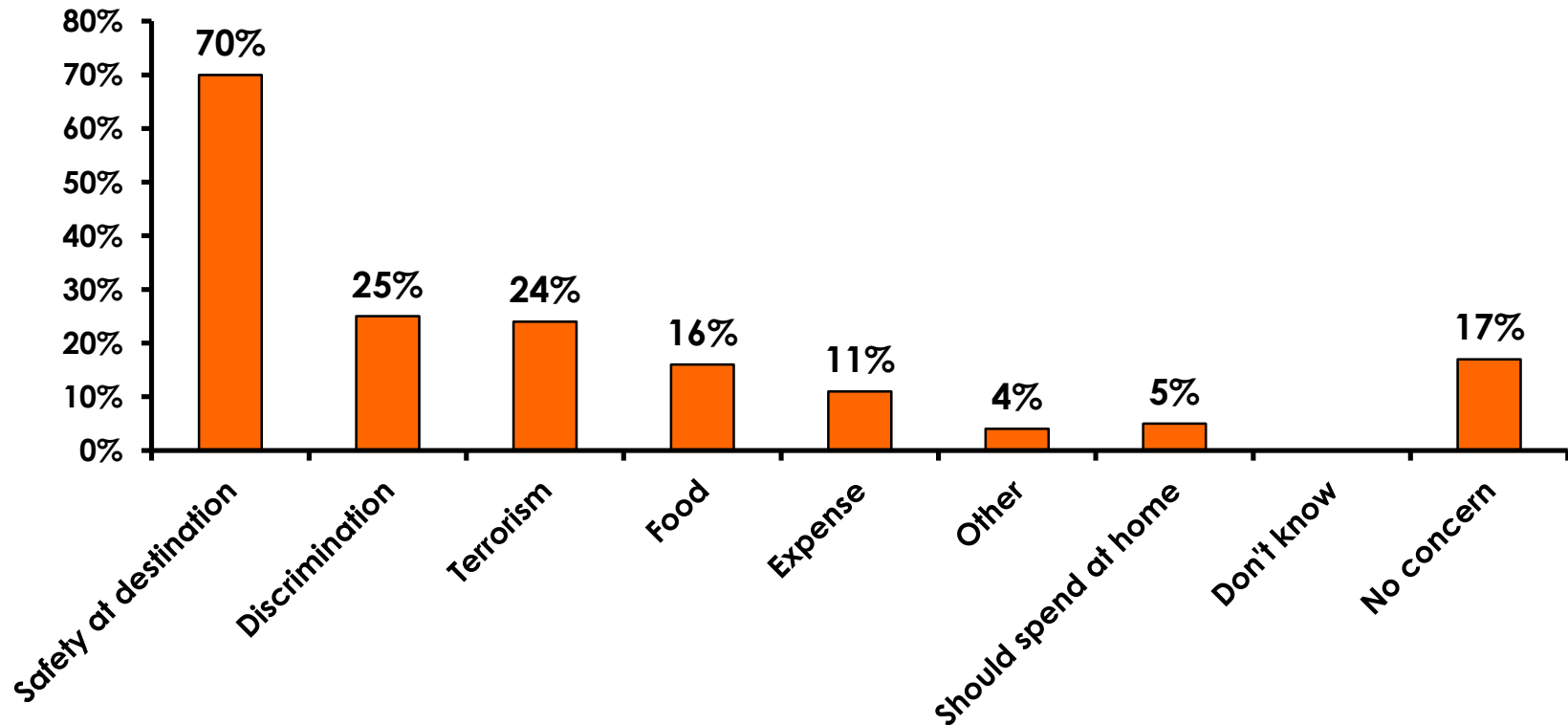
Sources of Information Post-arrival

- The primary local source of information are the Internet and hotel or tour staff.



SECTION 6 **OTHER ISSUES**

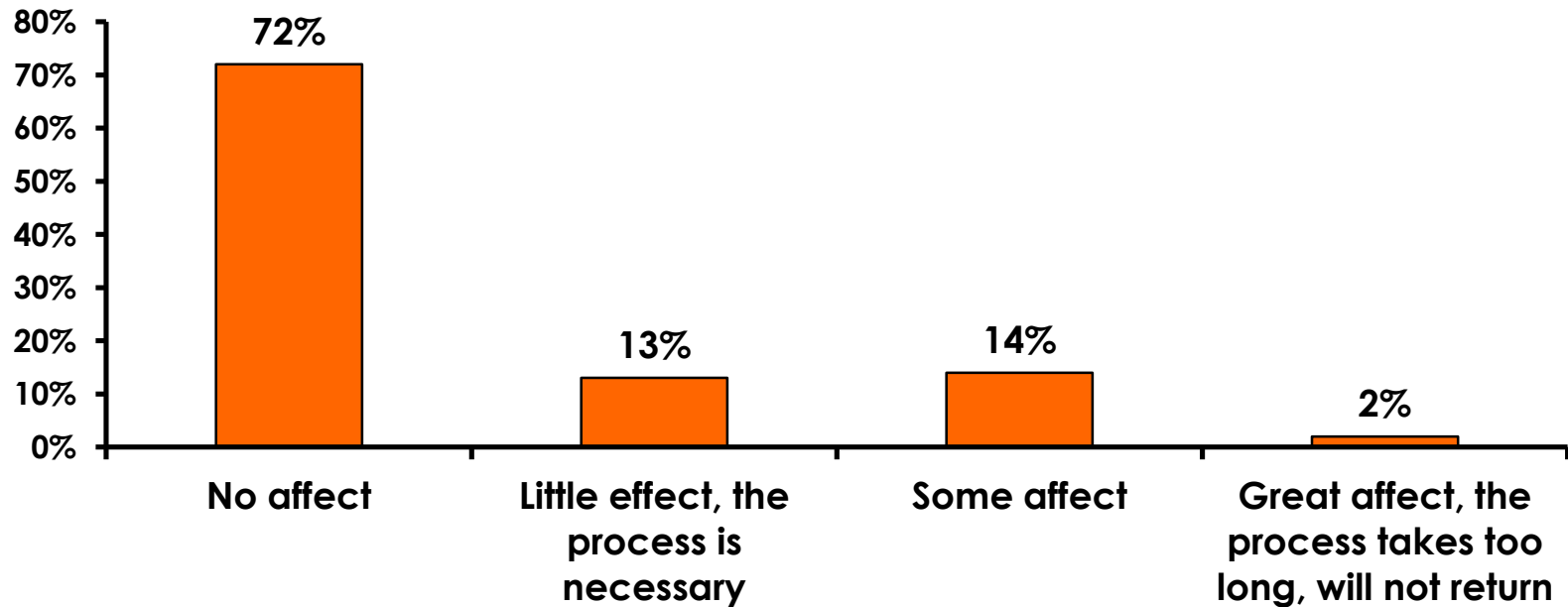
Concerns about travel outside of China - Overall



Concerns about travel outside of China - By Age & Income

		TOTAL	AGE				Q26							
		-	18-24	25-34	35-49	50+	<=CNY40K	CNY40K - CNY60K	CNY60K - CNY80K	CNY80K - CNY120K	CNY120K - CNY240K	CNY240K+	No Income	
Q21	Safety	70%	29%	73%	70%	83%	100%	73%	75%	69%	75%	63%		
	Discrimination against Chinese	25%		27%	33%	8%		27%	33%	19%	25%	26%		
	Terrorism	24%		32%	23%	17%		27%	17%	6%	38%	22%		
	No concerns	17%	43%	10%	23%	8%		9%	8%	25%	13%	22%	100%	
	Food	16%	14%	12%	23%	8%			33%	6%	17%	19%		
	Expense	11%	14%	15%	10%		50%		25%	6%	4%	11%		
	Should spend at home	5%		10%	3%				17%		4%	7%		
	Other	4%	14%	7%					8%		13%			
	Total	Count	100	7	41	40	12	2	11	12	16	24	27	1

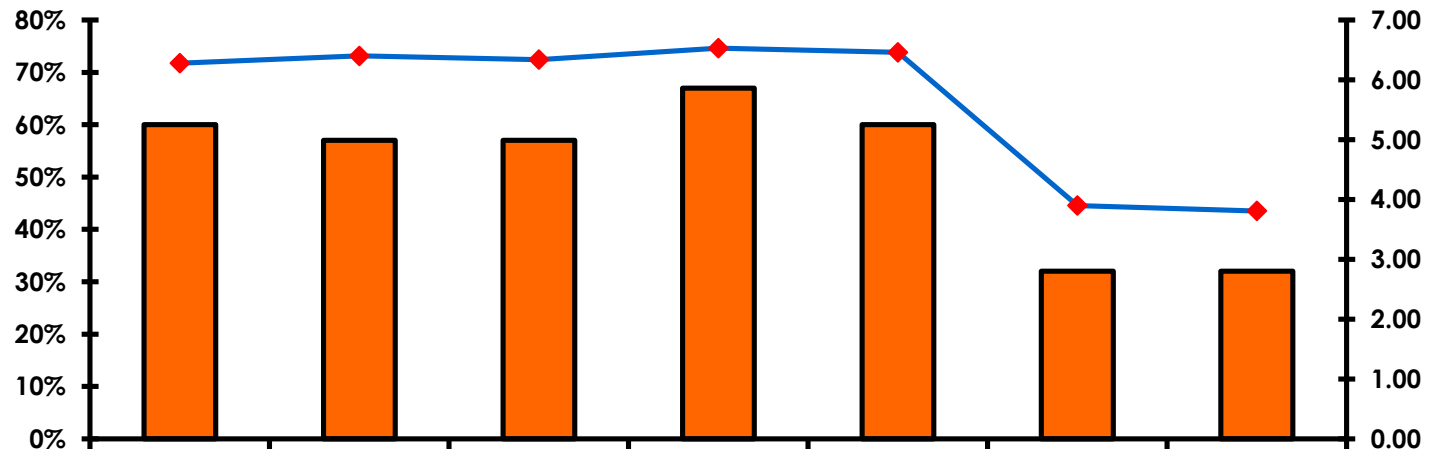
Security Screening/ Immigration Process at Guam International Airport





Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



 Strongly agree	60%	57%	57%	67%	60%	32%	32%
 MEAN	6.28	6.40	6.34	6.53	6.46	3.90	3.81

U.S. VISA

