



# **GUAM VISITORS BUREAU**

## **China Visitor Tracker Exit Profile**

### **FY2016**

### **3<sup>RD</sup> QTR. (APR~JUN 2016)**



**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 **103** 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 **103** 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.

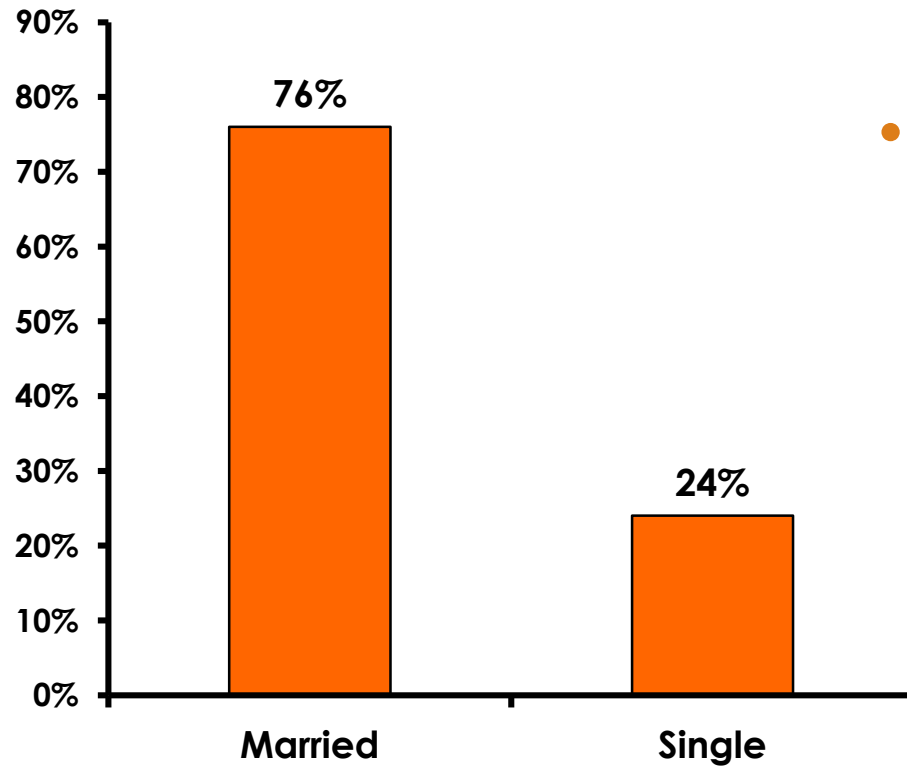
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# OBJECTIVES

- 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.

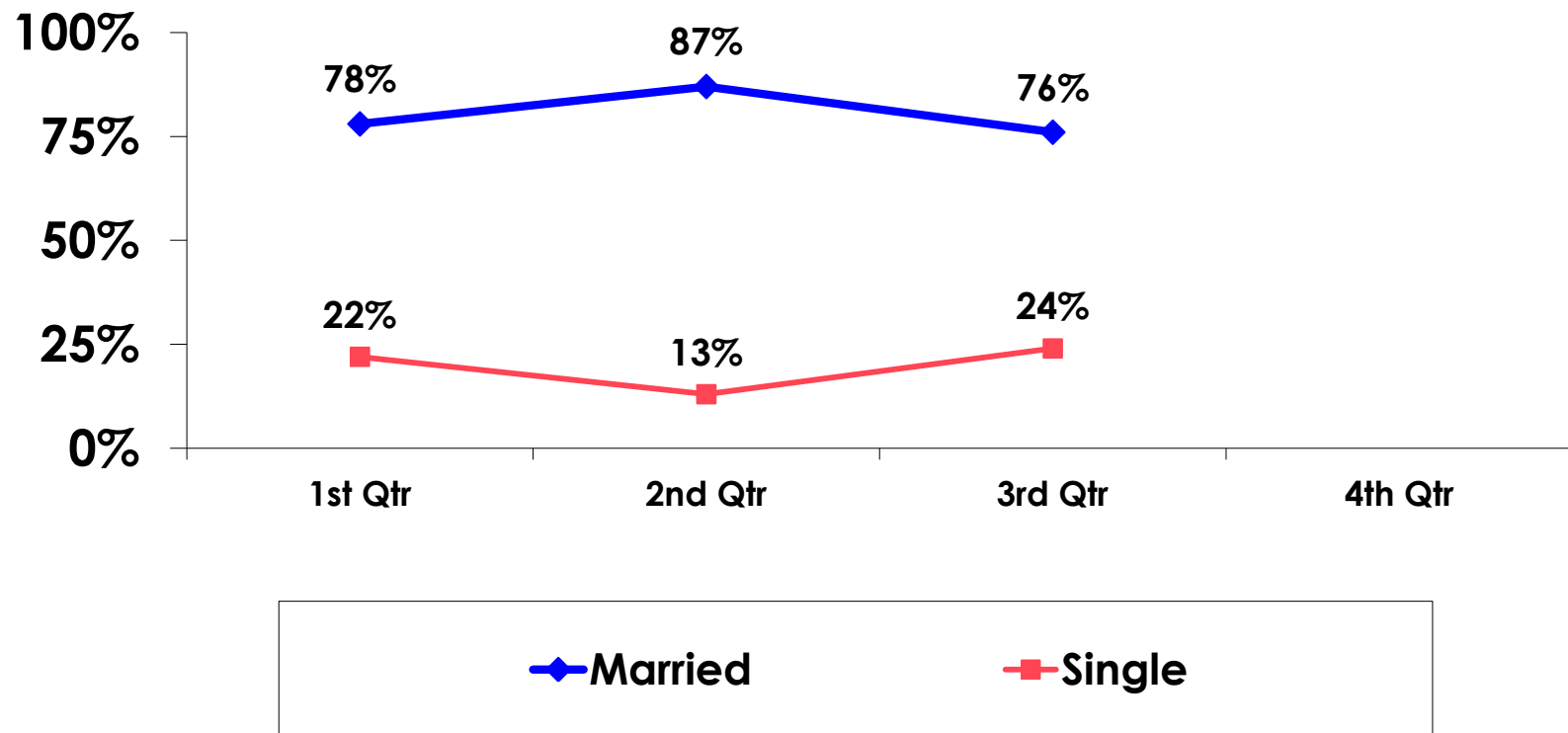
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

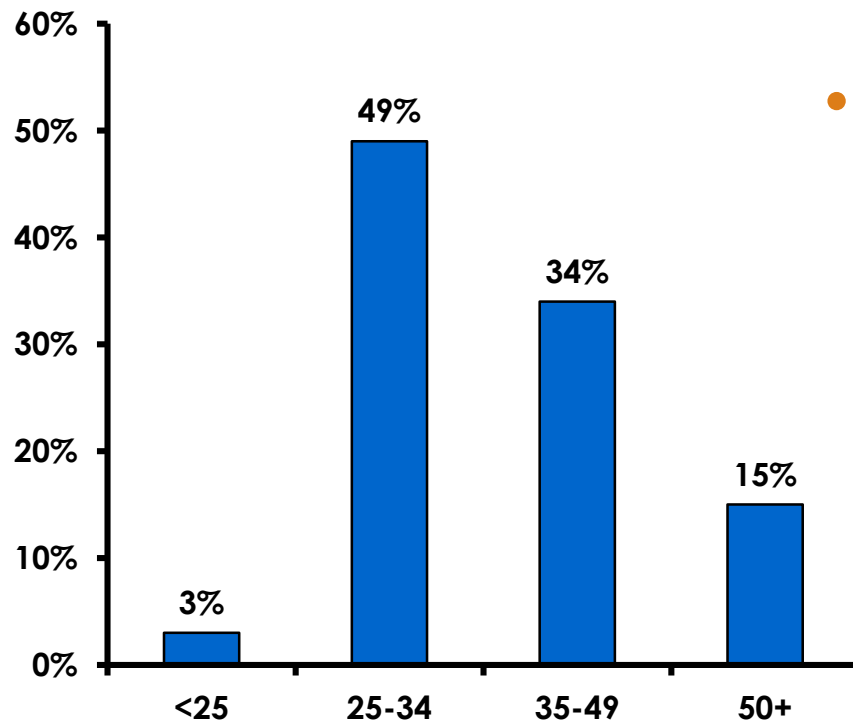


- Majority of visitors are married.

# MARITAL STATUS

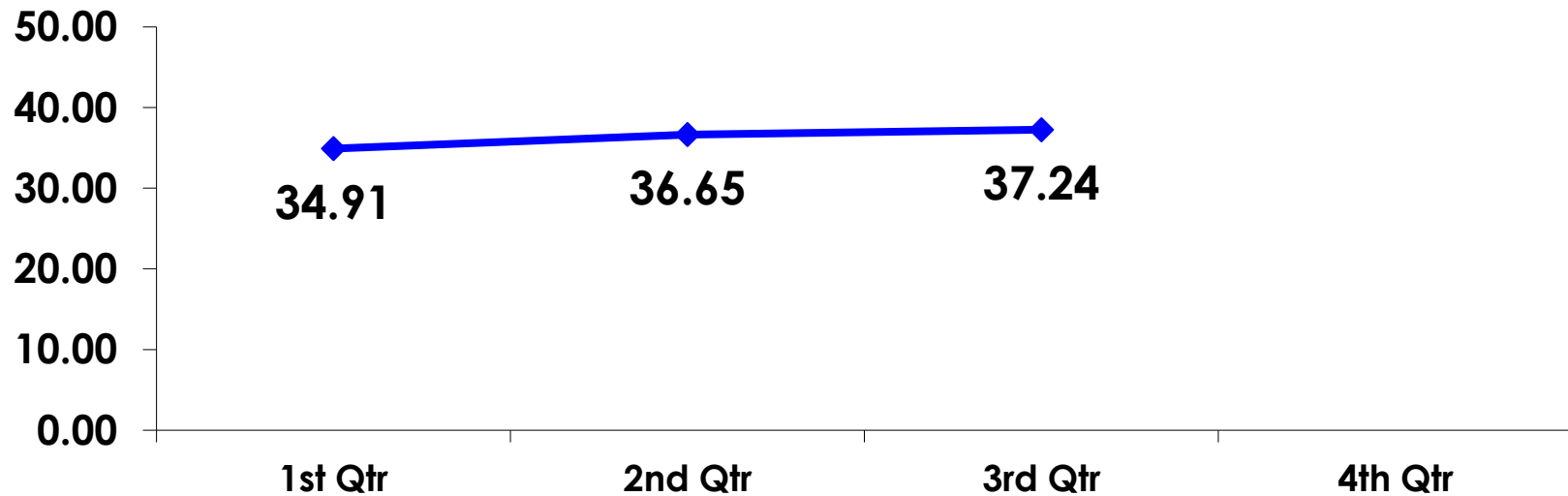


# Age - Overall



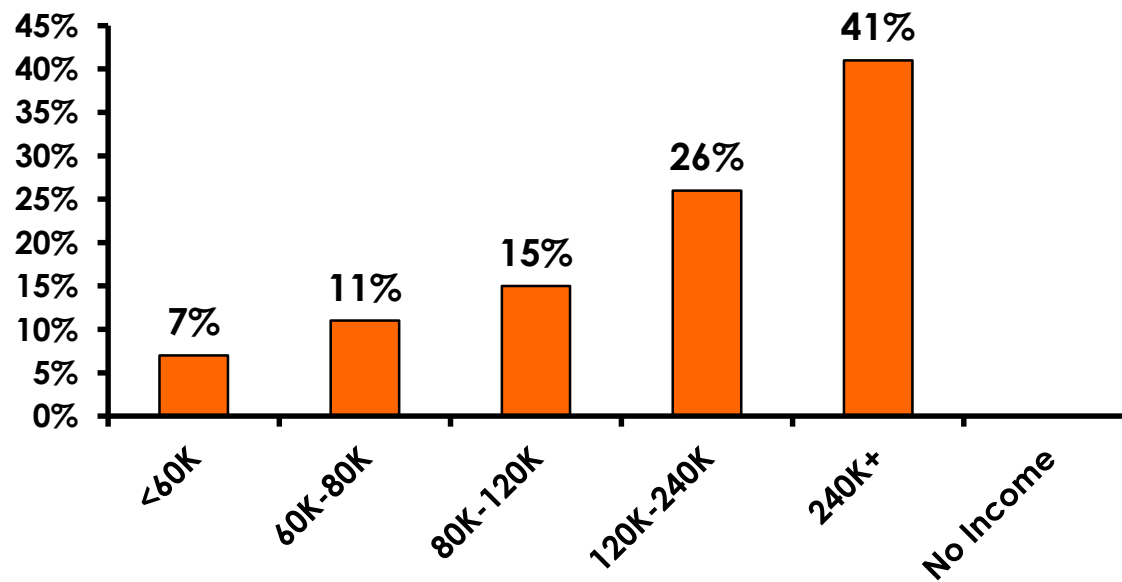
- The average age of the respondents is 37.24 years of age.

# AVERAGE - AGE



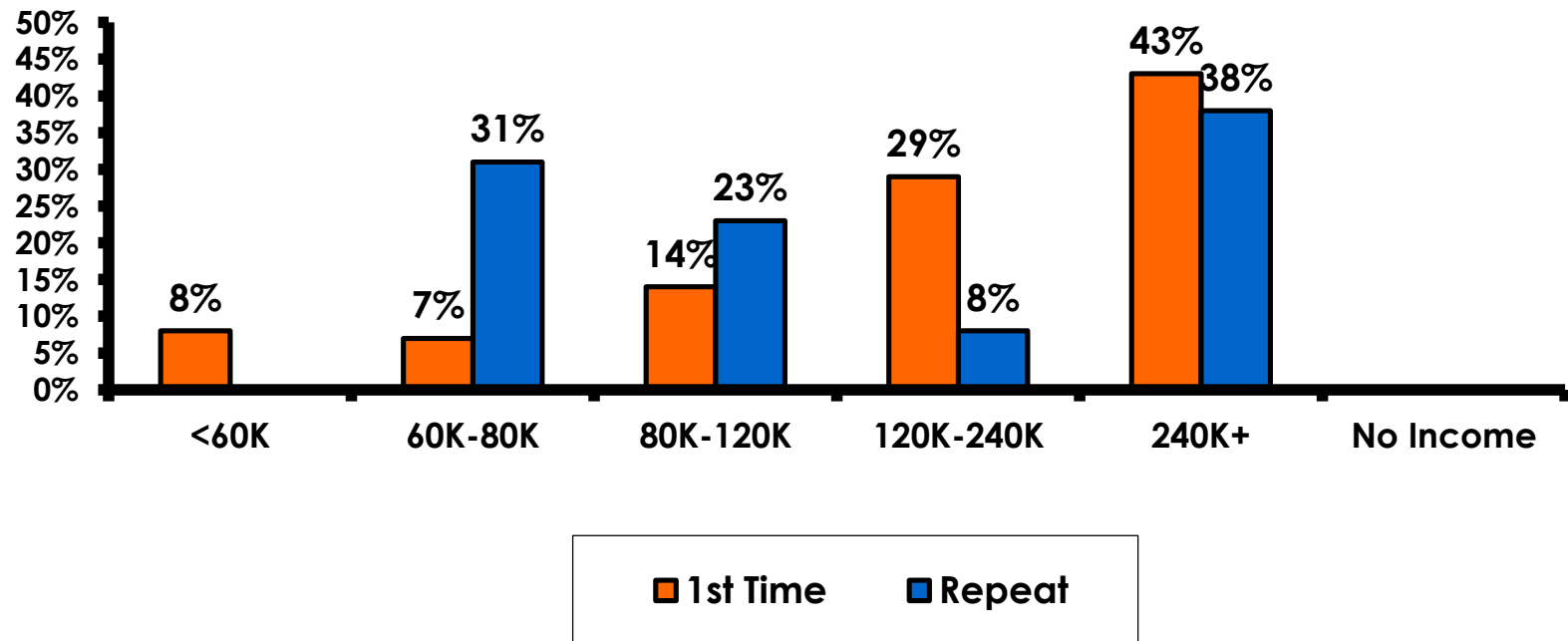


# Personal Income



- Yuan 6.55=\$1

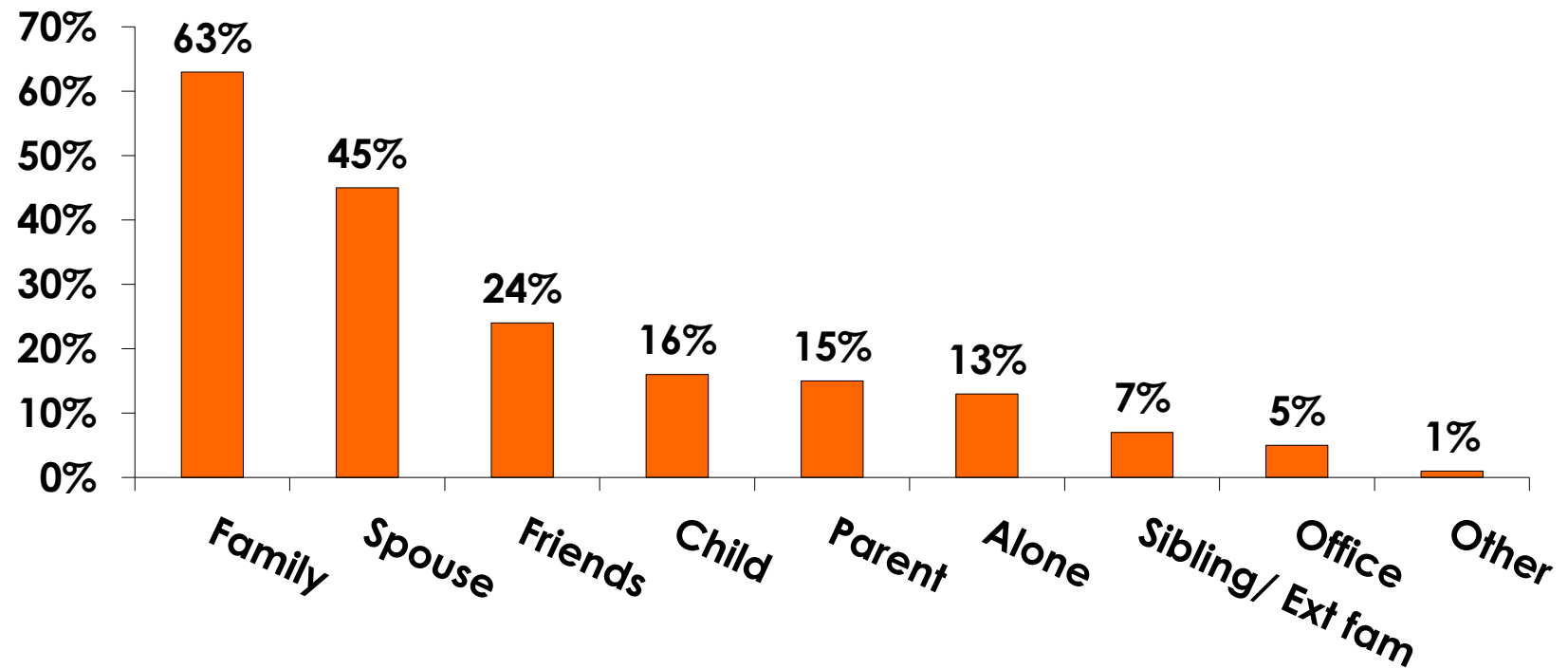
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<=CBY40K	Count	2		2	1	1		
		Column N %	2%		4%	33%	2%		
	CNY40K - CNY60K	Count	5	2	3	1	2		2
		Column N %	5%	4%	6%	33%	4%		14%
	CNY60K - CNY80K	Count	11	4	7		5	4	2
		Column N %	11%	8%	14%		10%	11%	14%
	CNY80K - CNY120K	Count	15	8	7	1	8	3	3
		Column N %	15%	15%	14%	33%	16%	9%	21%
	CNY120K - CNY240K	Count	27	14	13		14	10	3
		Column N %	26%	27%	26%		28%	29%	21%
	CNY240K+	Count	42	24	18		20	18	4
		Column N %	41%	46%	36%		40%	51%	29%
	Total	Count	102	52	50	3	50	35	14

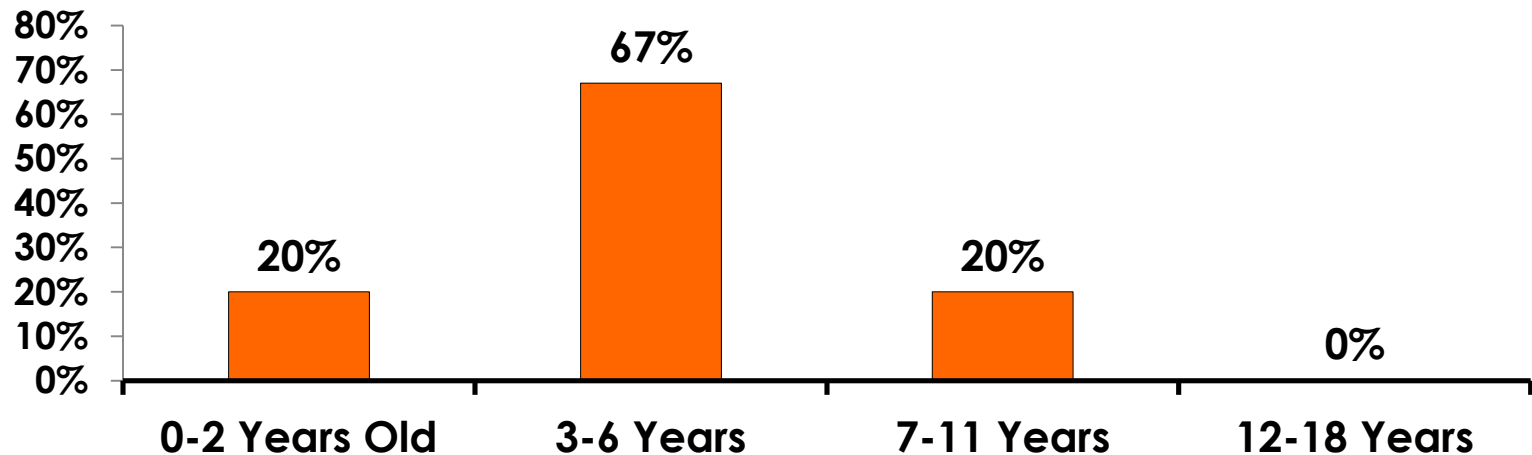
# Travel Companions



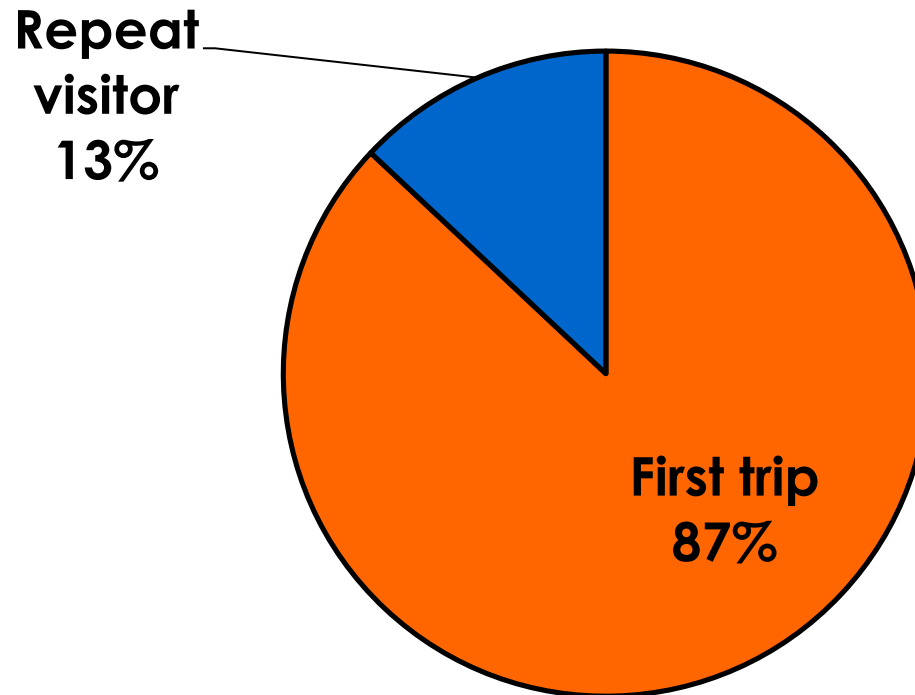
# Number of Children Travel Party

N=16 total respondents traveling with children.

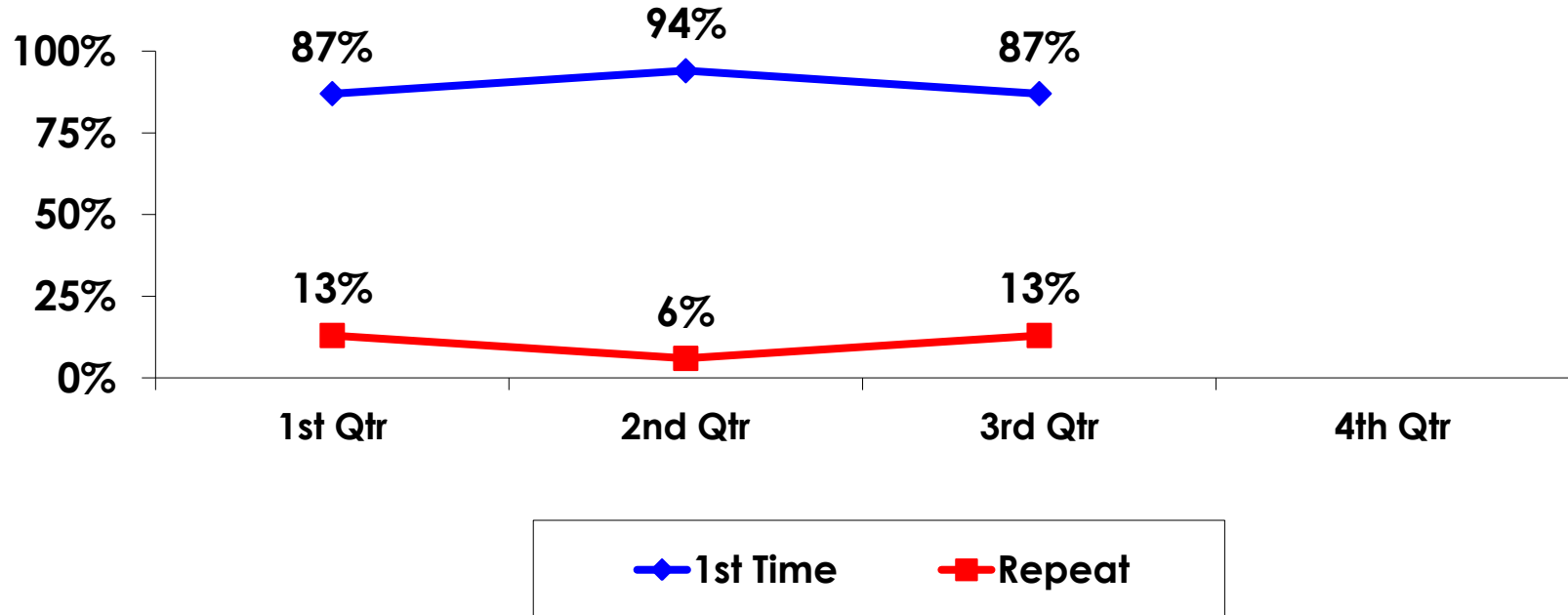
(Of those N=16 respondents, there is a total of 16 children 18 years or younger)



# Prior Trips to Guam



# PRIOR TRIPS TO GUAM



# Trips to Guam by Age & Gender

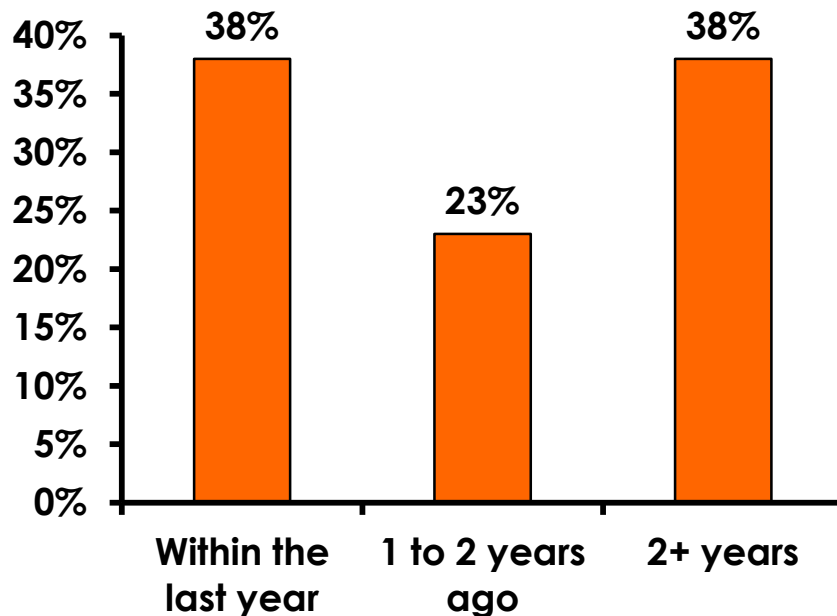
			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	53	45	8	
		Column N %	51%	51%	62%	
	Female	Count	50	43	5	
		Column N %	49%	49%	38%	
	Total	Count	103	88	13	
AGE	18-24	Count	3	2	1	
		Column N %	3%	2%	8%	
	25-34	Count	50	43	6	
		Column N %	49%	49%	46%	
	35-49	Count	35	29	5	
		Column N %	34%	33%	38%	
	50+	Count	15	14	1	
		Column N %	15%	16%	8%	
		Total	Count	103	88	13

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



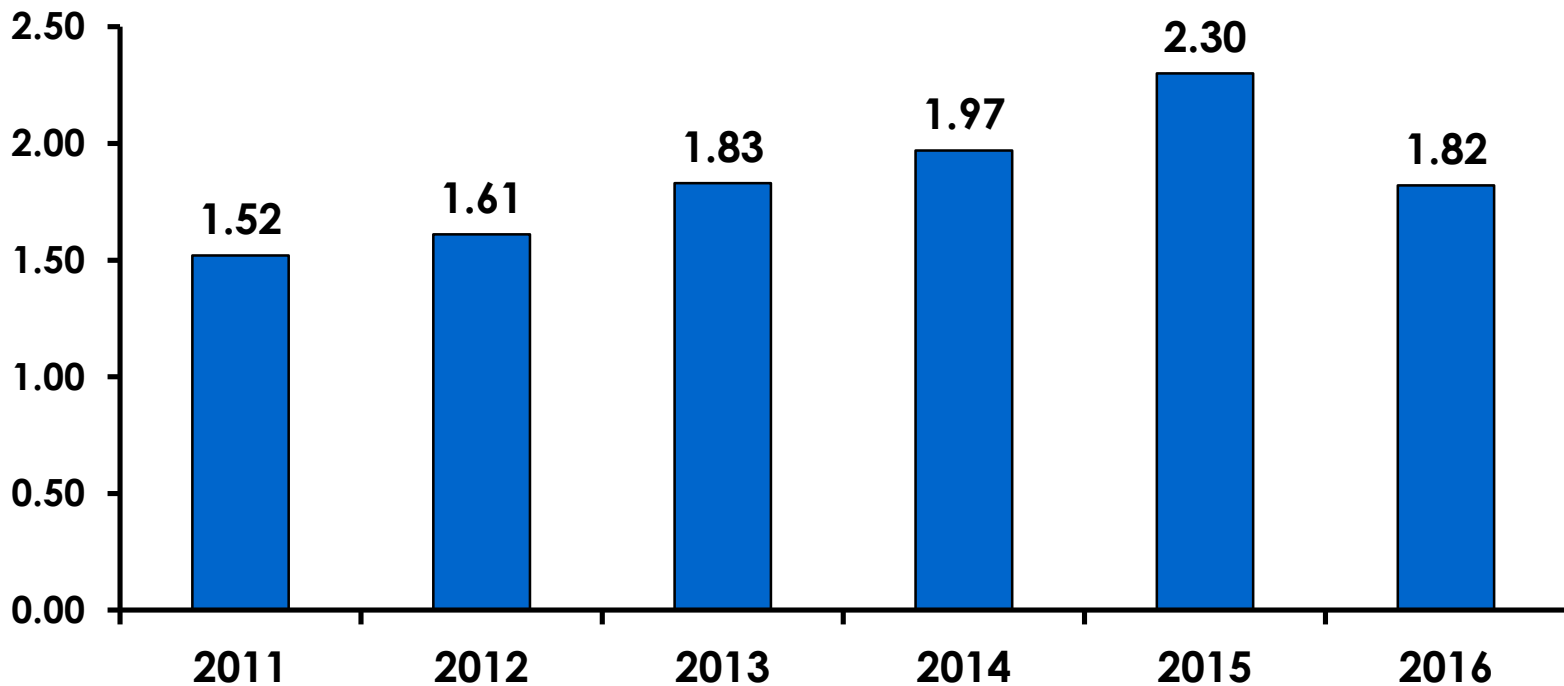
# Repeat Visitors Last Trip

n = 13



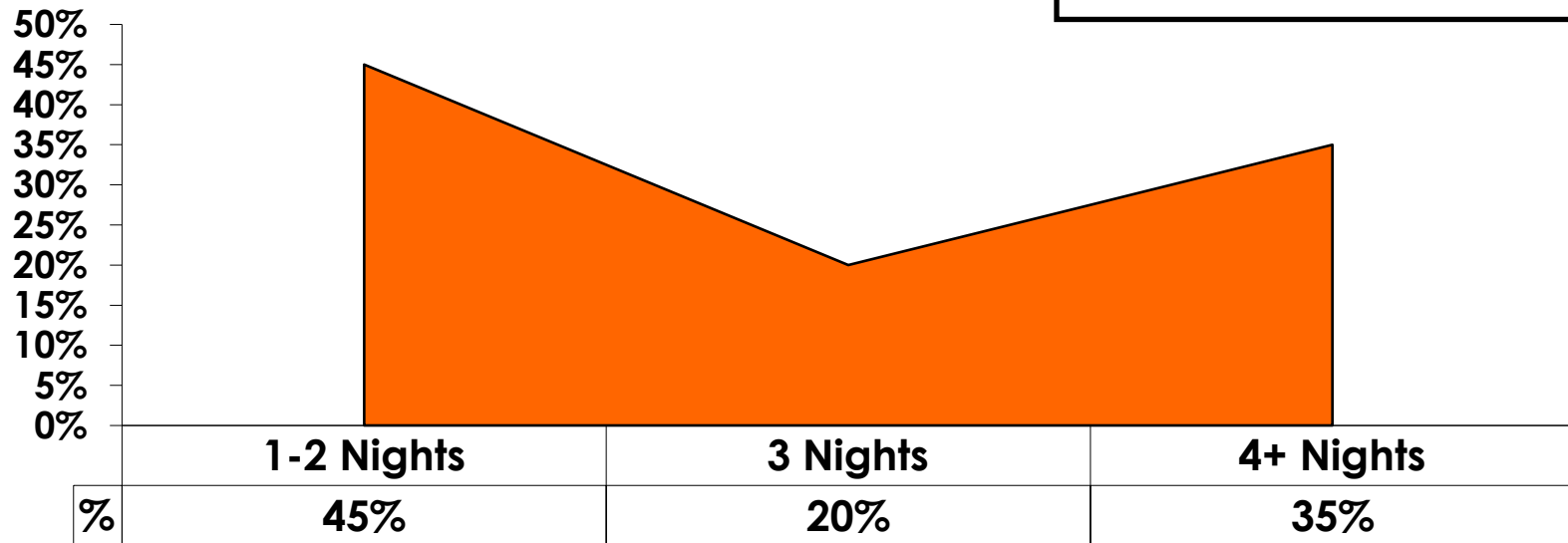
- The average repeat visitor has been to Guam 1.62 time.

# Average Number Overnight Trips (2011-2016) (2 nights or more)

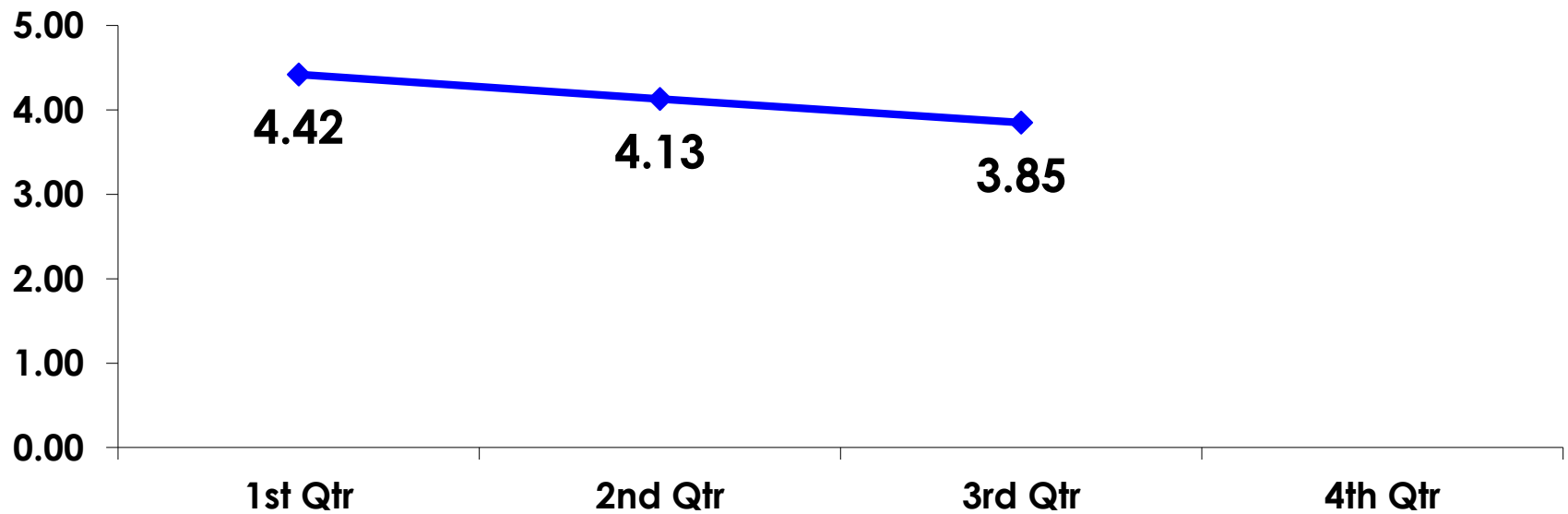


# Length of Stay

Mean = 3.85 Days  
Median = 3.0 Days



# AVG LENGTH OF STAY

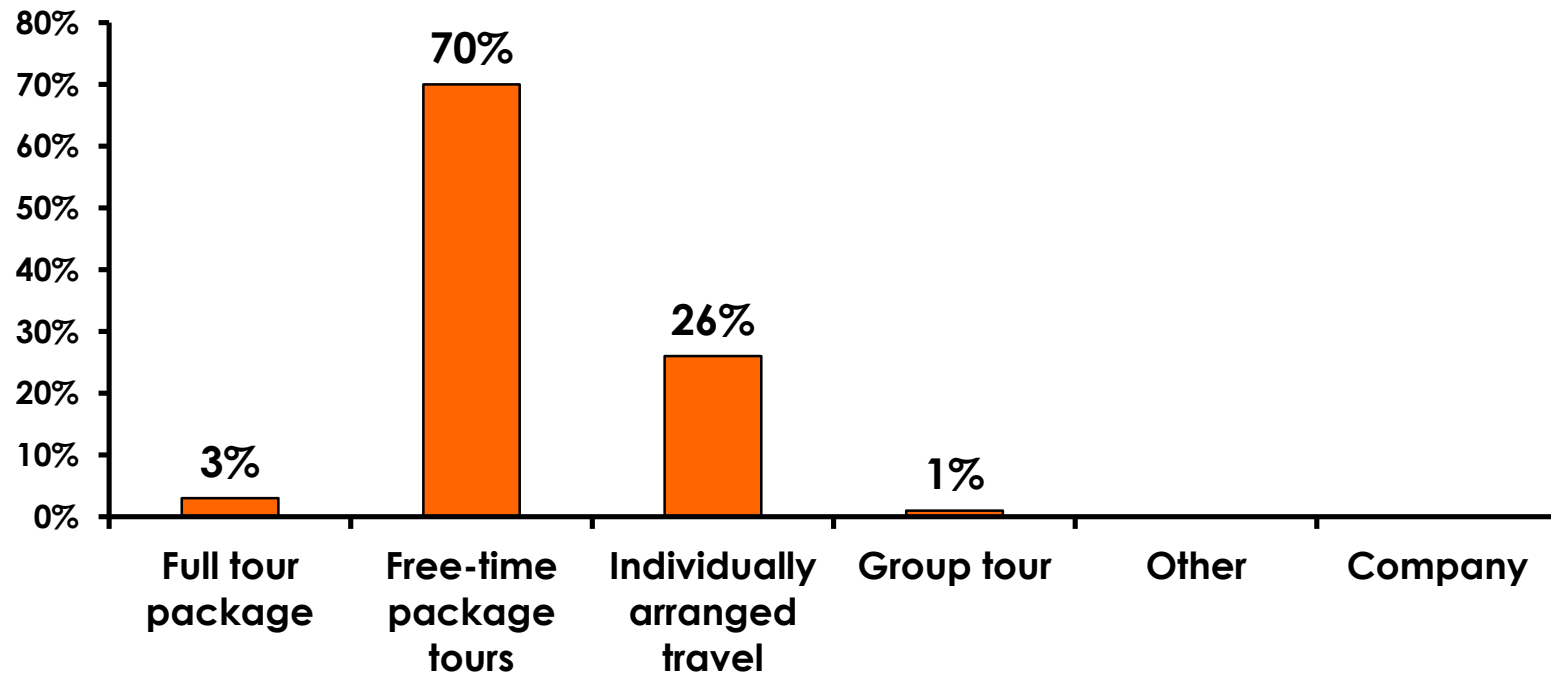


# Occupation by Income

		TOTAL	Q26						
		-	<=CNY40K	CNY40K - CNY60K	CNY60K - CNY80K	CNY80K - CNY120K	CNY120K - CNY240K	CNY240K+	No Income
Q25	Company: Office non-mgr	35%	100%	40%	55%	33%	41%	24%	
	Govt- Executive	21%				7%	4%	48%	
	Retired	9%		20%	9%	20%	4%	5%	
	Prof-specialist	9%		20%		7%	26%		
	Company: Salesperson	9%			18%	7%	11%	7%	
	Freelancer	5%		20%			4%	7%	
	Skilled worker	5%			9%	13%	4%	2%	
	Govt- Mgr/ Exec	3%					7%	2%	
	Other	2%			9%			2%	
	Govt- Office non-mgr	2%				7%		2%	
	Student	1%				7%			
	Total	Count	103	2	5	11	15	27	42

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



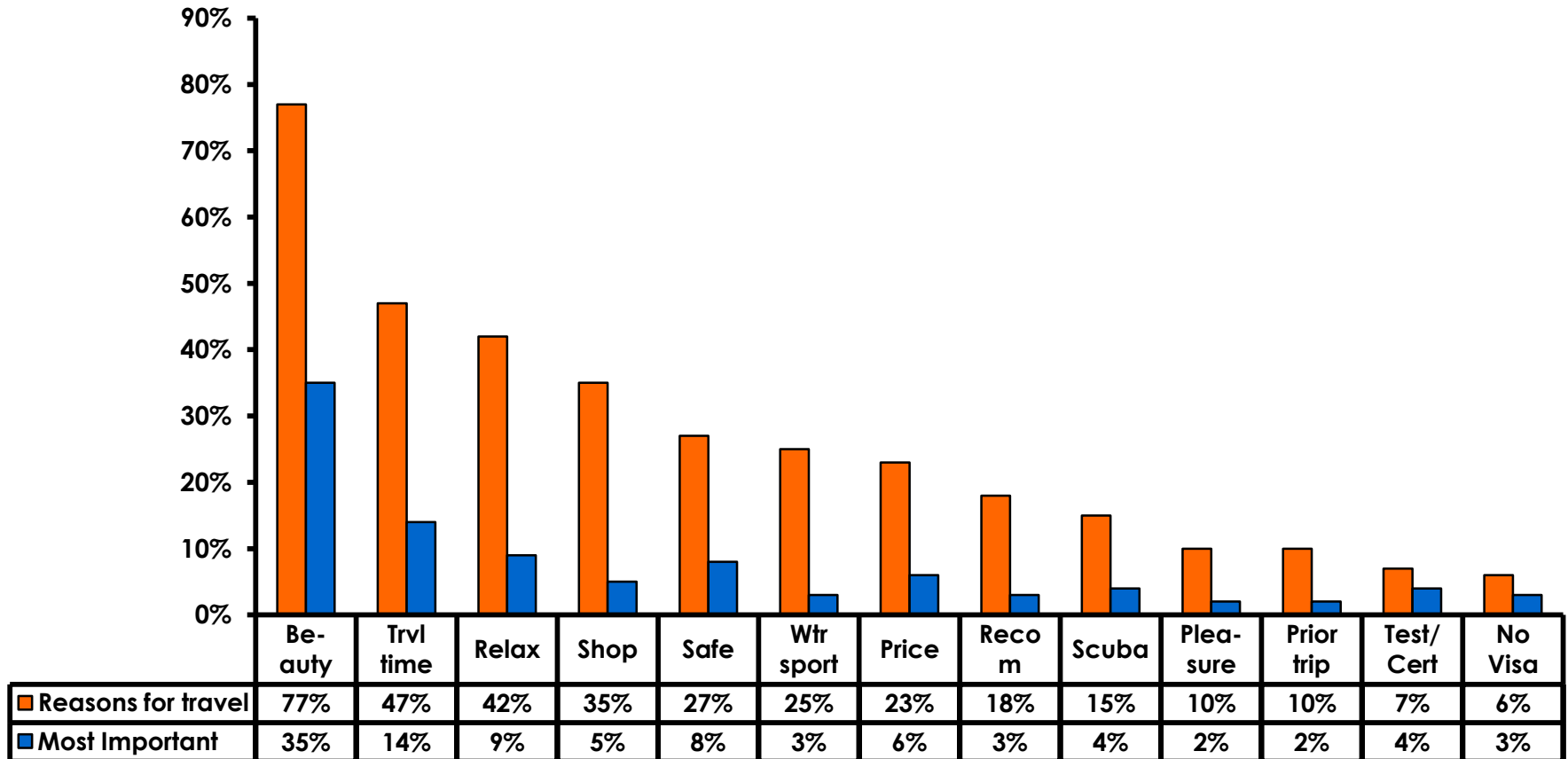
# Accommodation by Income

Average length of stay: 3.85 days

		TOTAL	Q26						
		-	<=CBY40K	CNY40K - CNY60K	CNY60K - CNY80K	CNY80K - CNY120K	CNY120K - CNY240K	CNY240K+	No Income
Q9	Hilton Guam Resort	27%	50%	20%	27%	53%	11%	29%	
	Guam Reef & Olive Spa Resort	17%			36%		19%	19%	
	Hyatt Regency Guam	9%				7%	22%	5%	
	Westin Resort Guam	6%					15%	5%	
	PIC Club	6%				7%		12%	
	Tumon Bay Capital Hotel	5%			9%	7%	4%	5%	
	Days Inn (Tamuning)	4%		20%			4%	2%	
	Guam Plaza Hotel	4%			9%	20%			
	Hotel Nikko Guam	4%			9%		4%	5%	
	Aqua Suites Guam	3%					4%	5%	
	Sheraton Laguna Guam	3%	50%	20%				2%	
	Lotte Hotel Guam	3%					4%	5%	
	Other	2%				7%	4%		
	Home stay/ friend/ relative	2%						5%	
	Bayview Hotel	2%			9%		4%		
	Dusit Thani	1%					4%		
	Verona Resort & Spa	1%						2%	
	Fiesta Resort Guam	1%					4%		
	Oceanview Hotel	1%		20%					
	Outrigger Guam Resort	1%		20%					
	Total	Count	103	2	5	11	15	27	42



# Travel Motivation - Top Responses



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# Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Relaxing atmosphere,
- and short travel time

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	77%	100%	80%	80%	53%	66%	88%	
	Short travel time	47%	33%	62%	34%	27%	34%	60%	
	Relax	42%	67%	48%	31%	40%	40%	44%	
	Shopping	35%	33%	30%	40%	40%	38%	32%	
	Safe	27%	33%	26%	31%	20%	25%	30%	
	Water sports	25%		34%	20%	13%	26%	24%	
	Price	23%		26%	17%	33%	21%	26%	
	Recomm- friend/family/trvl agnt	18%		18%	17%	27%	11%	26%	
	Scuba	15%		18%	17%		13%	16%	
	Pleasure	10%		12%	11%		8%	12%	
	Previous trip	10%		10%	11%	7%	13%	6%	
	Career Cert/ Testing	7%		8%	9%		4%	10%	
	No visa requirement	6%		4%	6%	13%	8%	4%	
	Honeymoon	5%		10%			6%	4%	
	Other	3%		4%	3%		4%	2%	
	Golf	3%			9%		6%		
	Visit friends/ Relatives	3%		2%	6%		6%		
	Organized sports	2%		2%	3%		4%		
	Total	Count	103	3	50	35	15	53	50

# Motivation by Income

		TOTAL	Q26						
		-	<=C4Y40K	CNY40K - CNY60K	CNY60K - CNY80K	CNY80K - CNY120K	CNY120K - CNY240K	CNY240K+	No Income
Q5A	Natural beauty	77%	100%	60%	91%	60%	78%	81%	
	Short travel time	47%	100%	20%	45%	20%	52%	55%	
	Relax	42%	50%	60%	45%	47%	41%	38%	
	Shopping	35%		40%	55%	40%	26%	33%	
	Safe	27%	50%	20%	45%	13%	22%	31%	
	Water sports	25%	50%		9%	13%	30%	33%	
	Price	23%		20%	18%	13%	22%	31%	
	Recomm- friend/family/trvl agnt	18%	50%		9%	13%	11%	29%	
	Scuba	15%			18%	20%	11%	17%	
	Pleasure	10%				7%	26%	5%	
	Previous trip	10%			27%	7%	4%	12%	
	Career Cert/ Testing	7%			27%		7%	5%	
	No visa requirement	6%		20%	27%		7%		
	Honeymoon	5%					15%	2%	
	Other	3%			9%	7%		2%	
	Golf	3%					11%		
	Visit friends/ Relatives	3%						7%	
	Organized sports	2%			9%			2%	
	Total	Count	103	2	5	11	15	27	42

# SECTION 3 **EXPENDITURES**

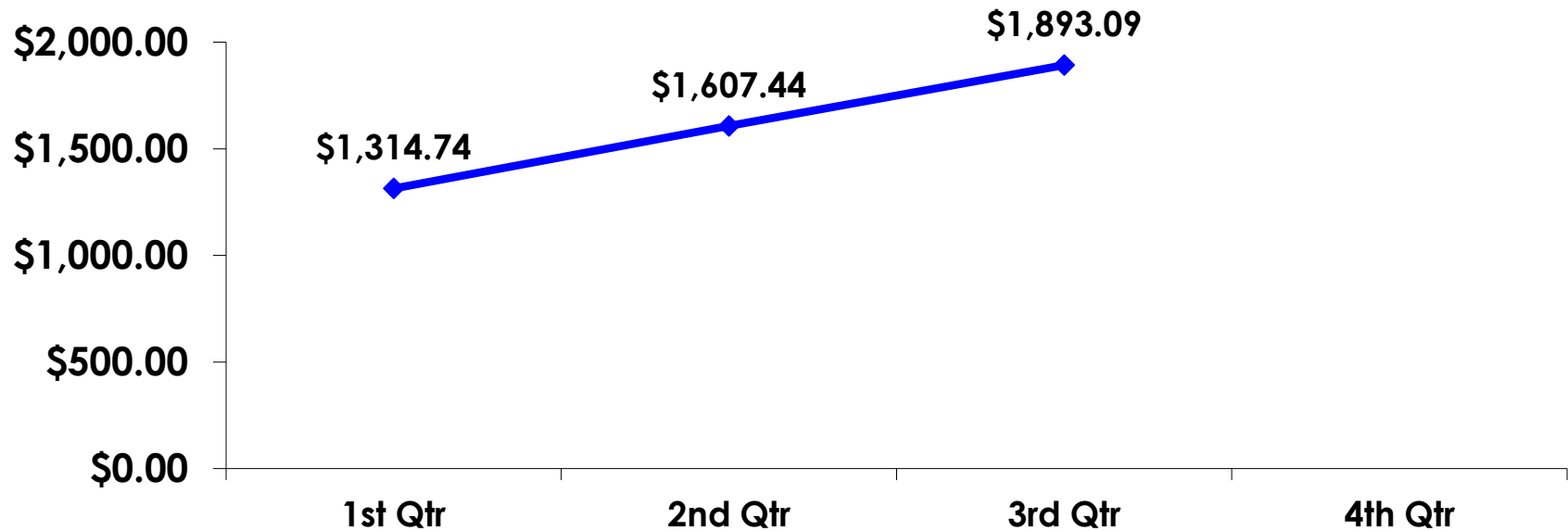
# Prepaid Expenditures

Yuan 6.55/US\$1

- \$3,267.14 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$41,374 = maximum (highest amount recorded for the entire sample)
- \$1,893.09 = overall mean average per person prepaid expenditures

# PREPAID EXPENDITURES

## Per Person



YTD=\$1,605.08

# Breakdown of Prepaid Expenditures

## Yuan 6.55=\$1

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

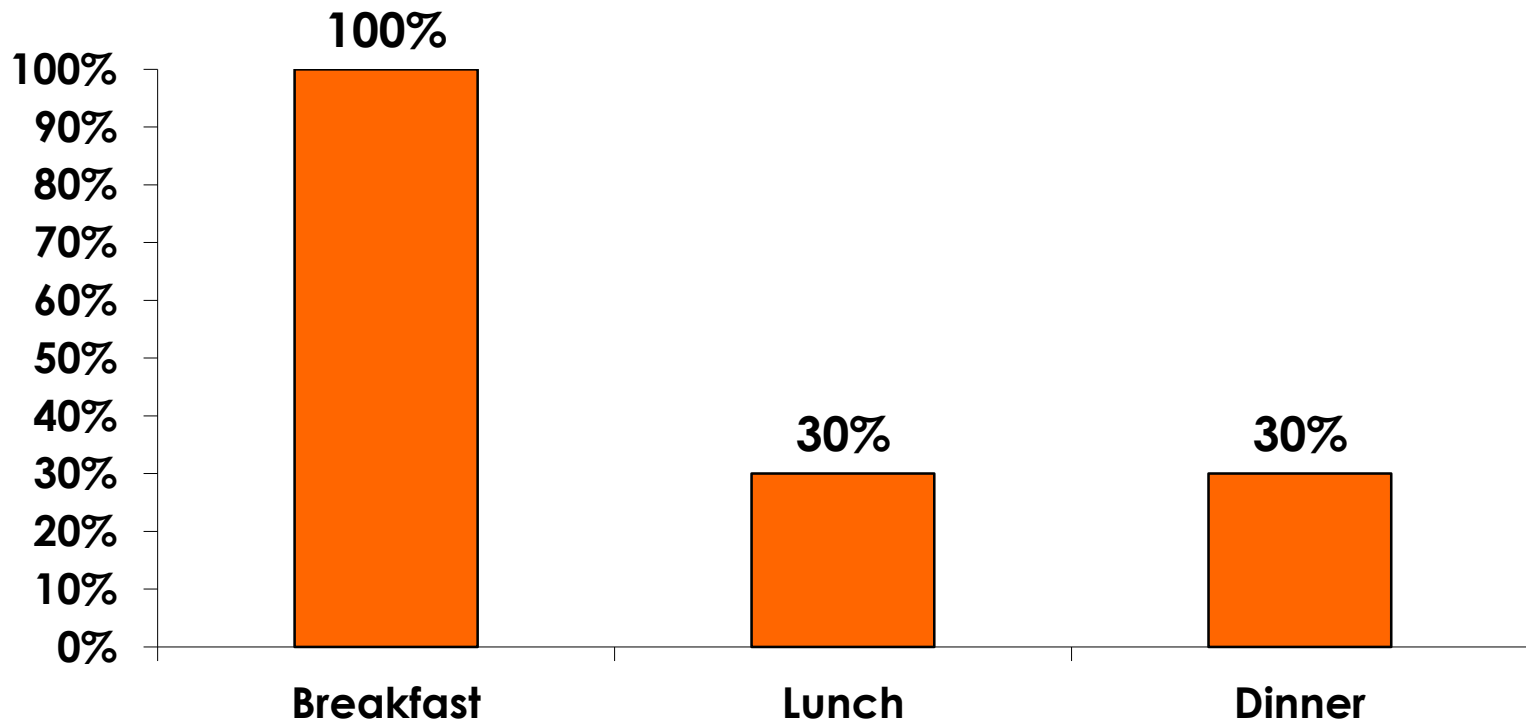
	MEAN \$
Air & Accommodation package only	\$3,121.85
Air & Accommodation w/ daily meal package	\$2,375.93
Air only	\$1,547.07
Accommodation only	\$985.67
Accommodation w/ daily meal only	\$458.02
Food & Beverages in Hotel	\$135.88
Ground transportation – China	\$38.73
Ground transportation – Guam	\$229.86
Optional tours/ activities	\$1,969.47
U.S. Visa Application	\$338.74
Other expenses	\$1,245.61
<b>Total Prepaid</b>	<b>\$3,267.14</b>



# PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n= 10

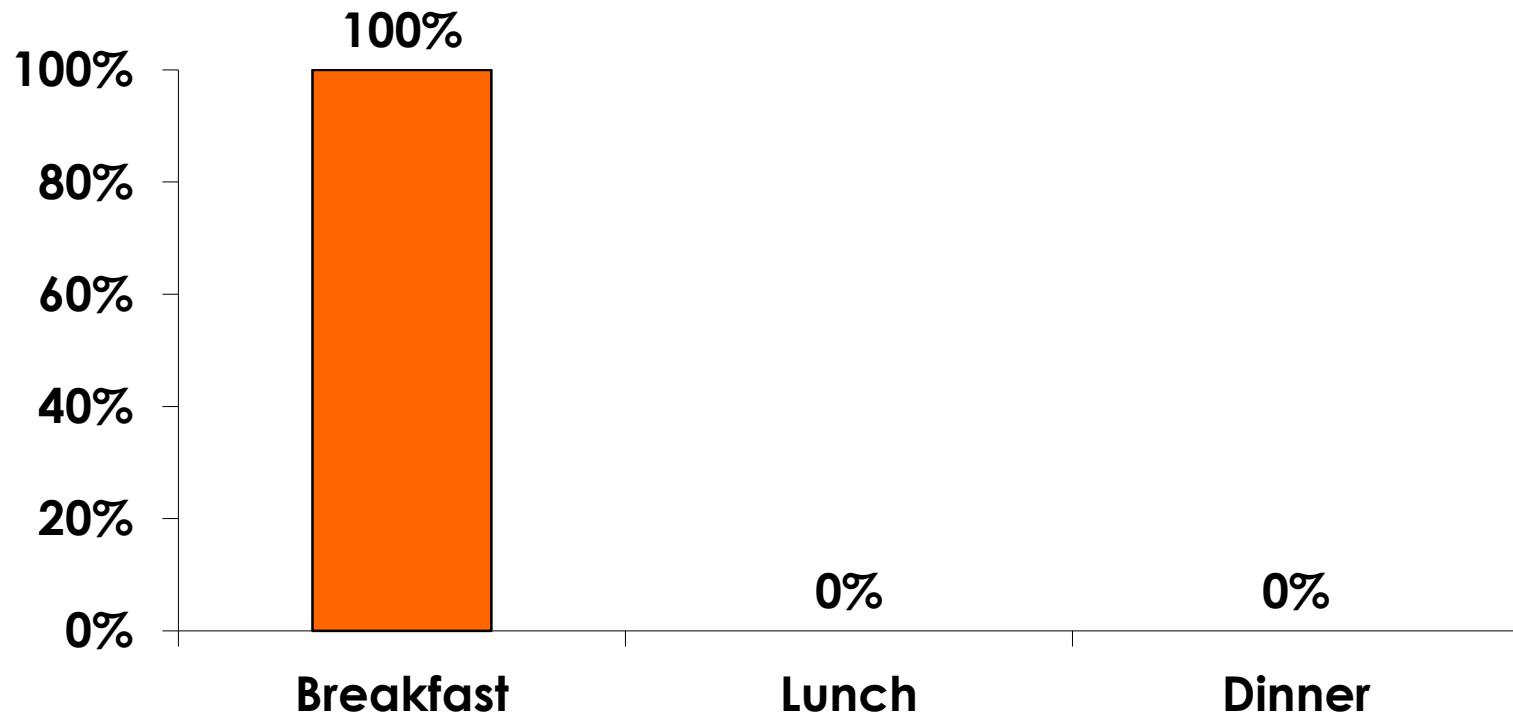


Mean=\$2,375.93 per travel party

# PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

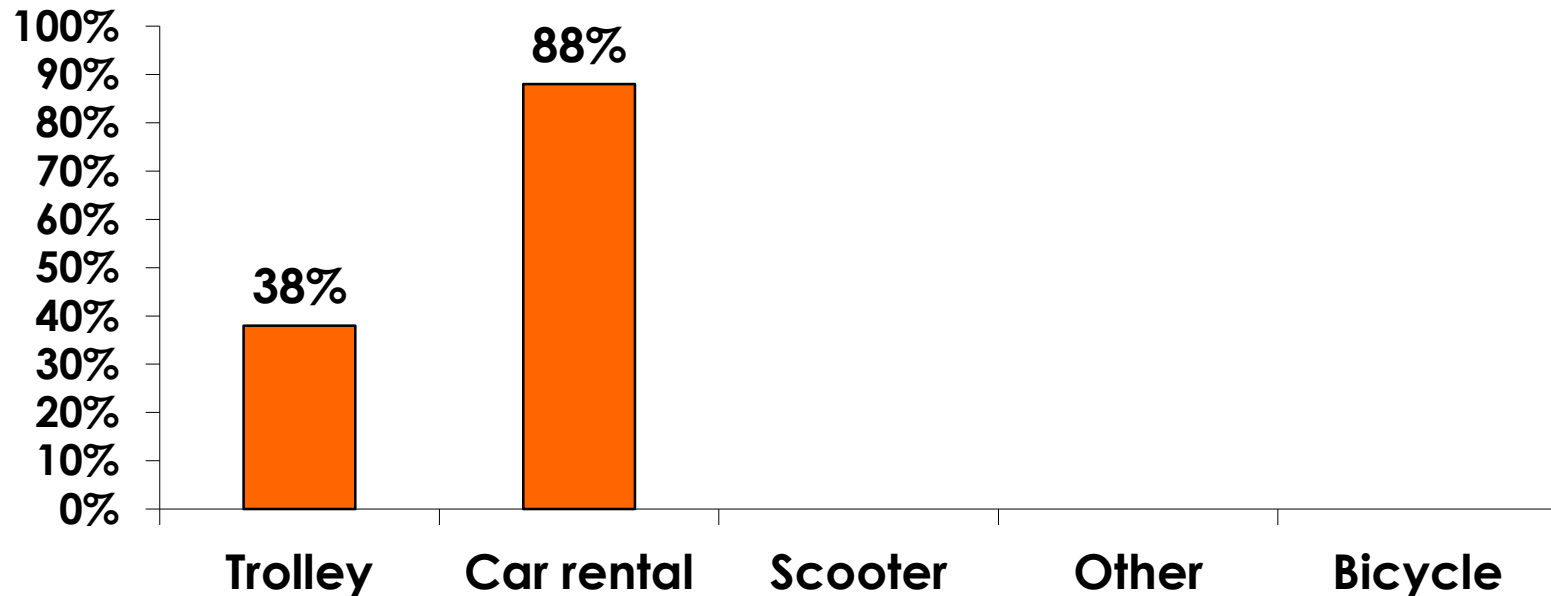
n= 1



Mean=\$458.02 per travel party

# PREPAID GROUND TRANSPORTATION

n= 8



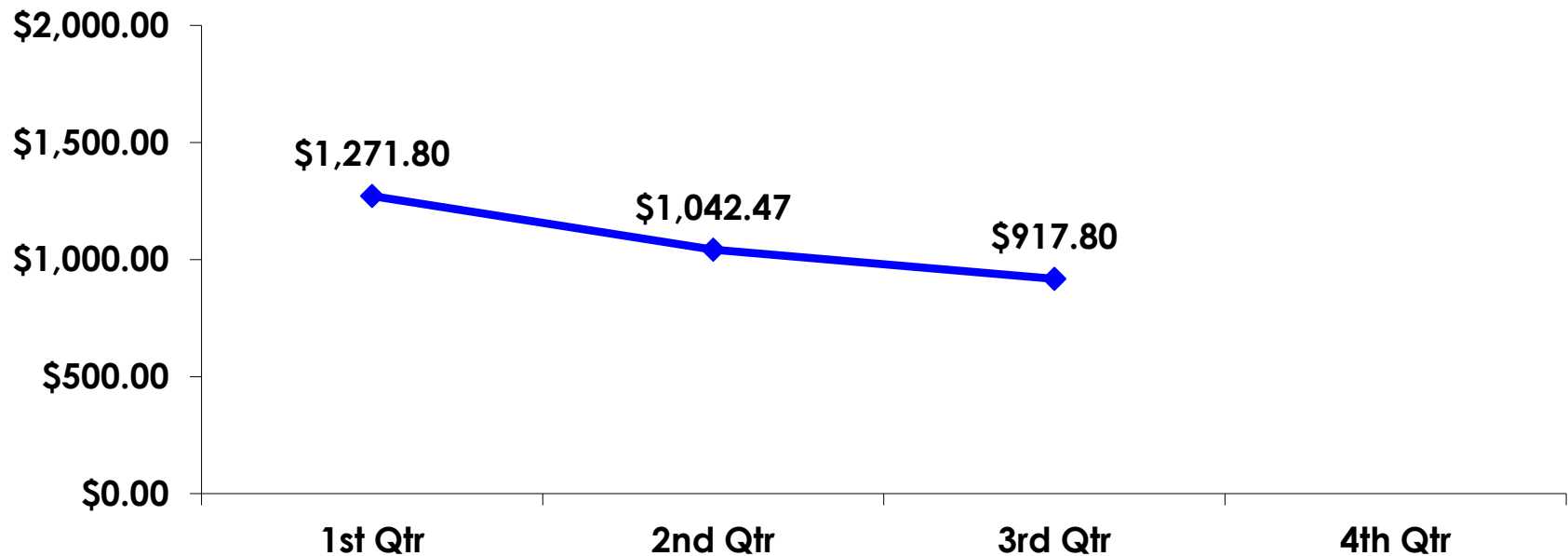
Mean=\$229.86 per travel party

# On-Island Expenditures

- \$1,391.20 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,000 = Maximum (highest amount recorded for the entire sample)
- \$917.80 = overall mean average per person on-island expenditure

# ON-ISLAND EXPENDITURES

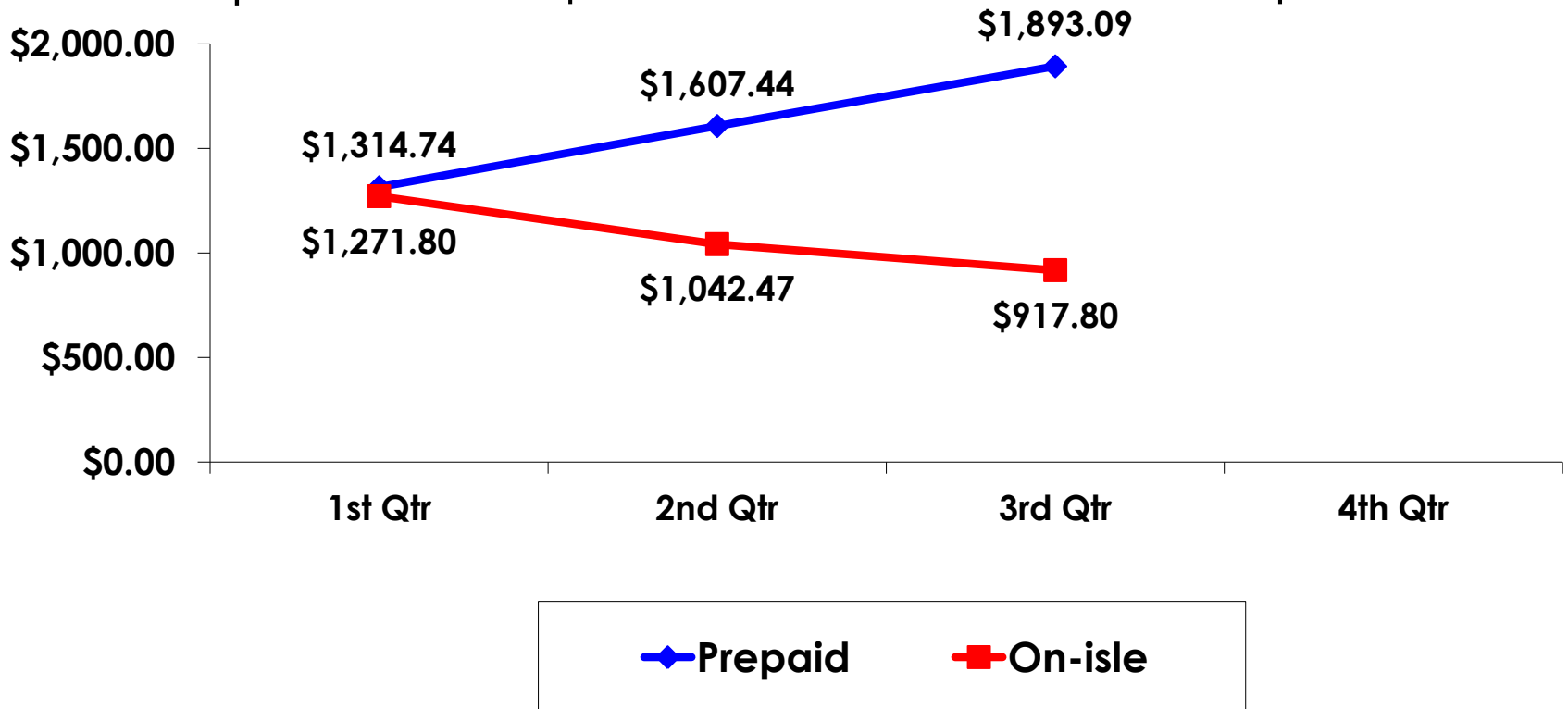
## Per Person



YTD = \$1,077.47

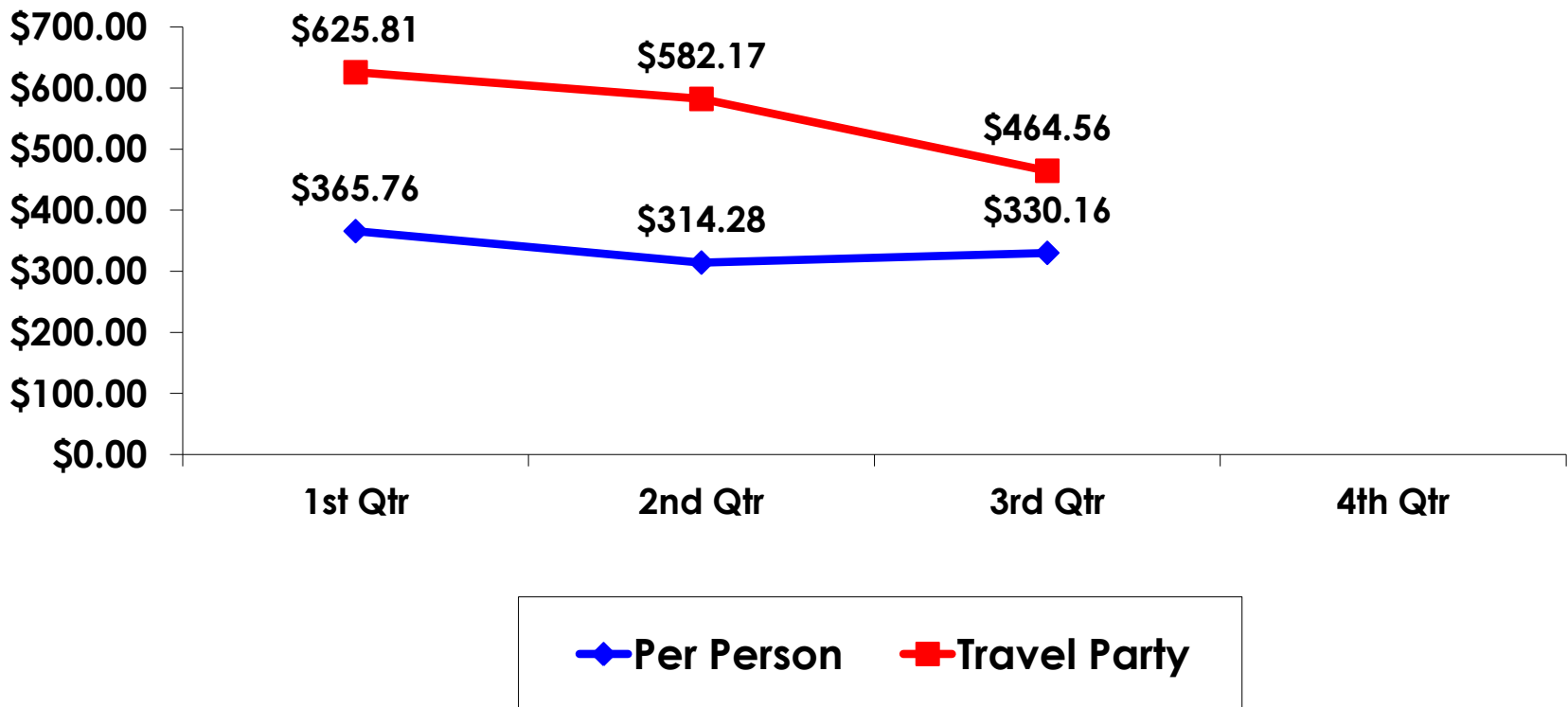
# PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$1,605.08    On-Isle YTD = \$1,077.47



# ON-ISLE EXPENDITURES – Per DAY

Per Person YTD= \$336.81    Travel Party YTD= \$557.43



# 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	\$917.80	\$667.62	\$1,182.99	\$650.00	\$394.62	\$831.67	\$805.50	\$100.00	\$1,329.66	\$1,016.00	\$1,081.43
	Median	\$650	\$500	\$750	\$650	\$241	\$500	\$800	\$100	\$750	\$700	\$1,200
	Minimum	\$0	\$0	\$0	\$650	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$10,000	\$3,360	\$10,000	\$650	\$1,800	\$3,360	\$2,000	\$200	\$10,000	\$2,500	\$2,620



# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$71.97	\$86.91	\$56.14	\$33.33	\$41.14	\$108.57	\$97.07
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$58.93	\$92.45	\$23.40	\$33.33	\$30.40	\$116.57	\$24.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$55.51	\$60.57	\$50.16	\$33.33	\$63.00	\$55.66	\$34.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$191.18	\$195.45	\$186.66	\$33.33	\$175.28	\$239.26	\$163.60
	Median	\$0	\$0	\$0	\$50	\$0	\$0	\$0
GIFT- SELF	Mean	\$183.09	\$180.17	\$186.18	\$50.00	\$208.94	\$224.60	\$26.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- OTHER	Mean	\$77.42	\$84.34	\$70.08	\$116.67	\$49.28	\$98.86	\$113.33
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TRANS	Mean	\$70.56	\$28.83	\$114.80	\$66.67	\$20.42	\$107.34	\$152.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$681.37	\$400.08	\$979.54	\$133.33	\$786.62	\$481.03	\$907.60
	Median	\$0	\$0	\$400	\$150	\$240	\$0	\$264
TOTAL	Mean	\$1,391.20	\$1,129.36	\$1,668.76	\$500.00	\$1,375.08	\$1,433.60	\$1,524.27
	Median	\$1,000	\$1,000	\$1,000	\$200	\$1,000	\$1,000	\$1,000

# On-Island Expenditures

## First Timers & Repeaters

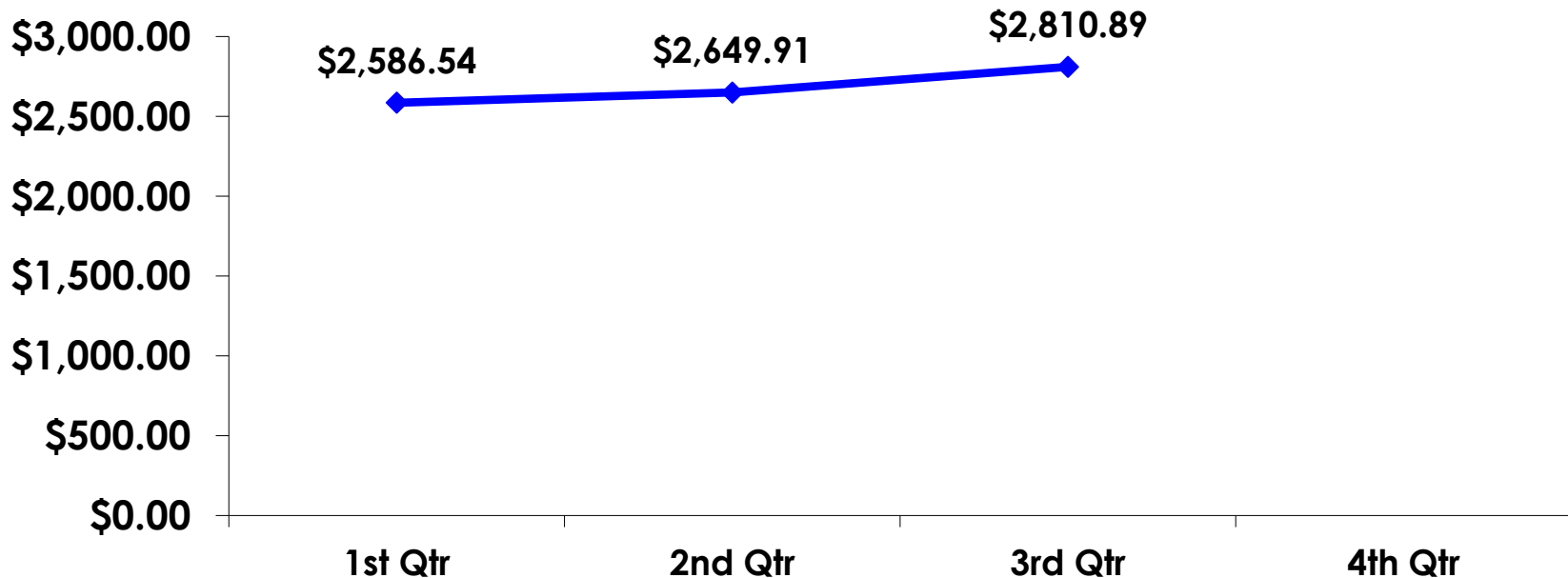
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$71.97	\$80.26	\$26.92
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$58.93	\$63.86	\$34.62
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$55.51	\$57.59	\$38.46
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$191.18	\$199.11	\$50.00
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$183.09	\$208.05	\$42.31
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$77.42	\$73.57	\$107.69
	Median	\$0	\$0	\$0
TRANS	Mean	\$70.56	\$53.36	\$187.23
	Median	\$0	\$0	\$0
OTHER	Mean	\$681.37	\$658.88	\$553.85
	Median	\$0	\$0	\$250
TOTAL	Mean	\$1,391.20	\$1,396.05	\$1,041.08
	Median	\$1,000	\$1,000	\$1,000

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# Total Expenditures Per Person (Prepaid & On-Island)

- \$2,810.89 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$15,647 = Maximum (highest amount recorded for the entire sample)

# TOTAL EXPENDITURES Per Person



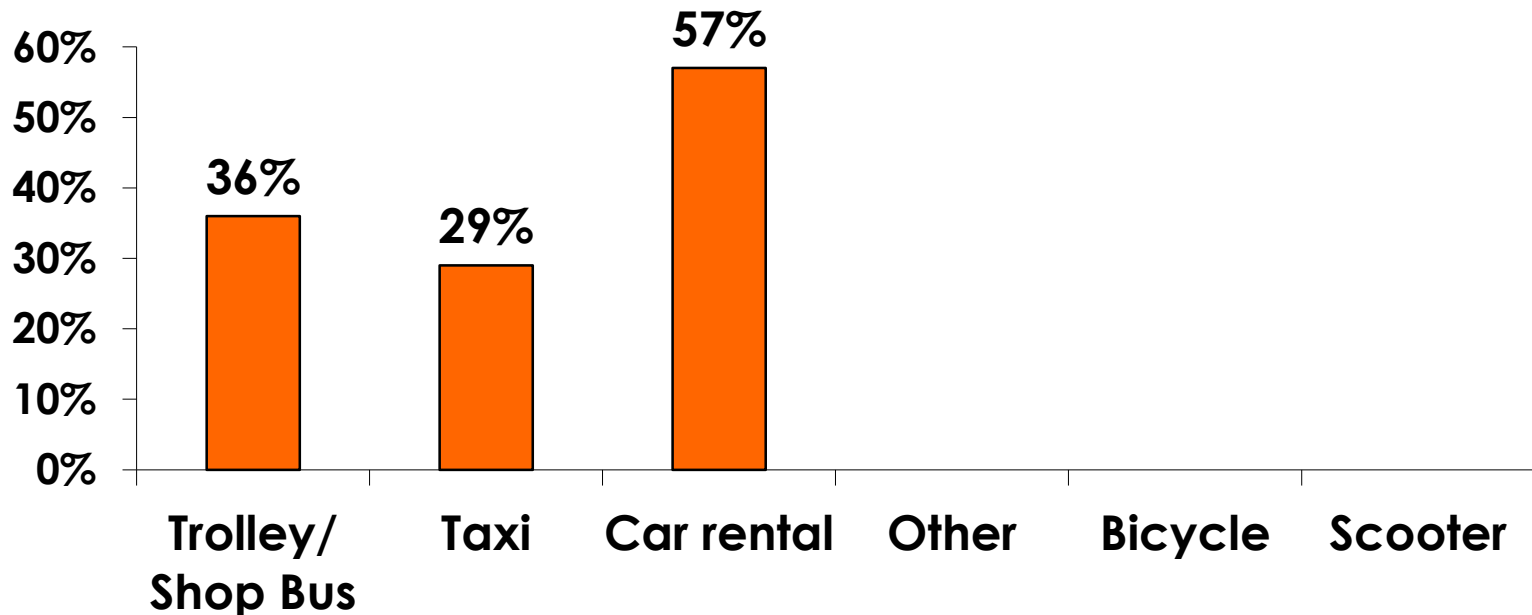
YTD=\$2,682.55

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$71.97
Food & beverage in fast food restaurant/convenience store	\$58.93
Food & beverage at restaurants or drinking establishments outside a hotel	\$55.51
Optional tours and activities	\$191.18
Gifts/ souvenirs for yourself/companions	\$183.09
Gifts/ souvenirs for friends/family at home	\$77.42
Local transportation	\$70.56
Other expenses not covered	\$681.37
<b>Average Total</b>	<b>\$1,391.20</b>

# Local Transportation

n= 28



Mean=\$70.56 per travel party

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# Guam Airport Expenditures

- \$115.15 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,000 = Maximum (highest amount recorded for the entire sample)

# Breakdown of Airport Expenditures

	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	\$30.40
<b>Gifts/Souvenirs Self</b>	\$59.74
<b>Gifts/Souvenirs Others</b>	\$25.01
<b>Total</b>	<b>\$115.15</b>

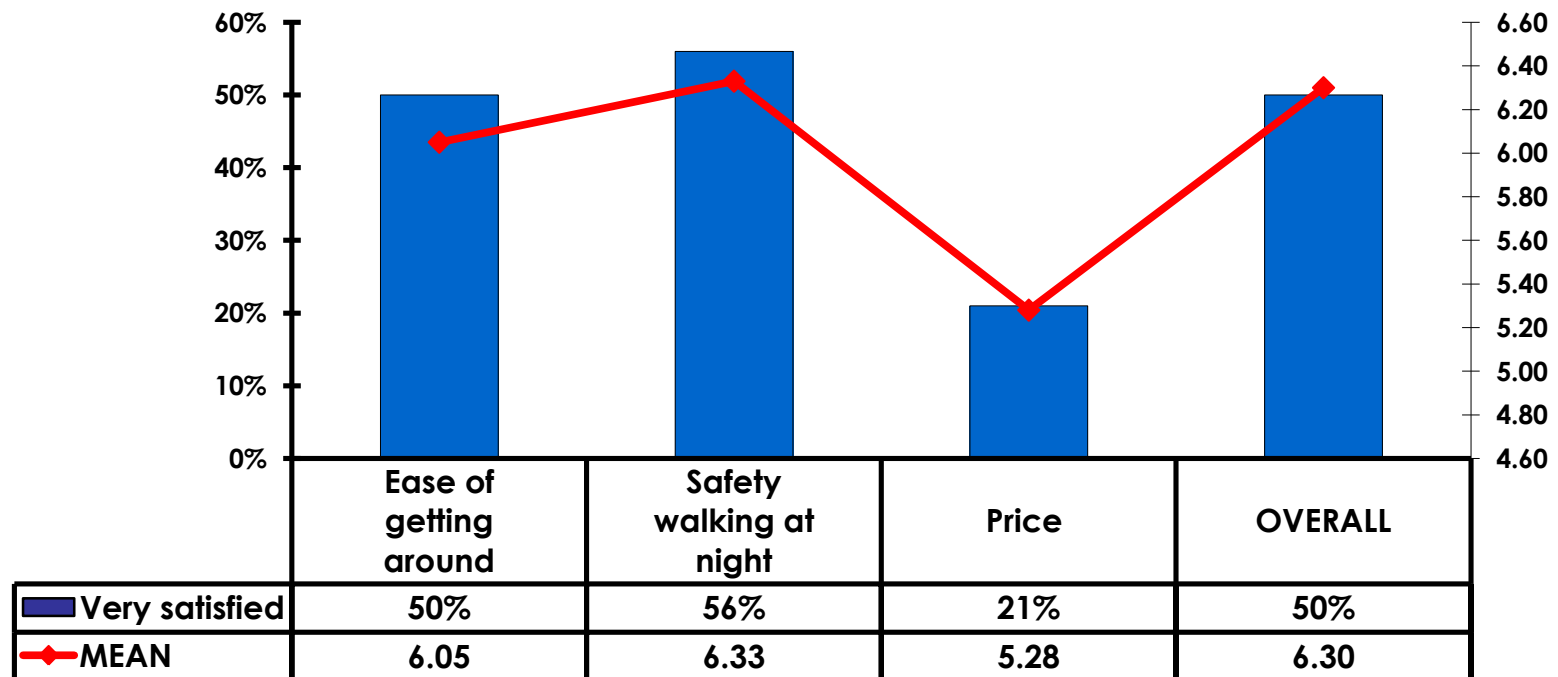


# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

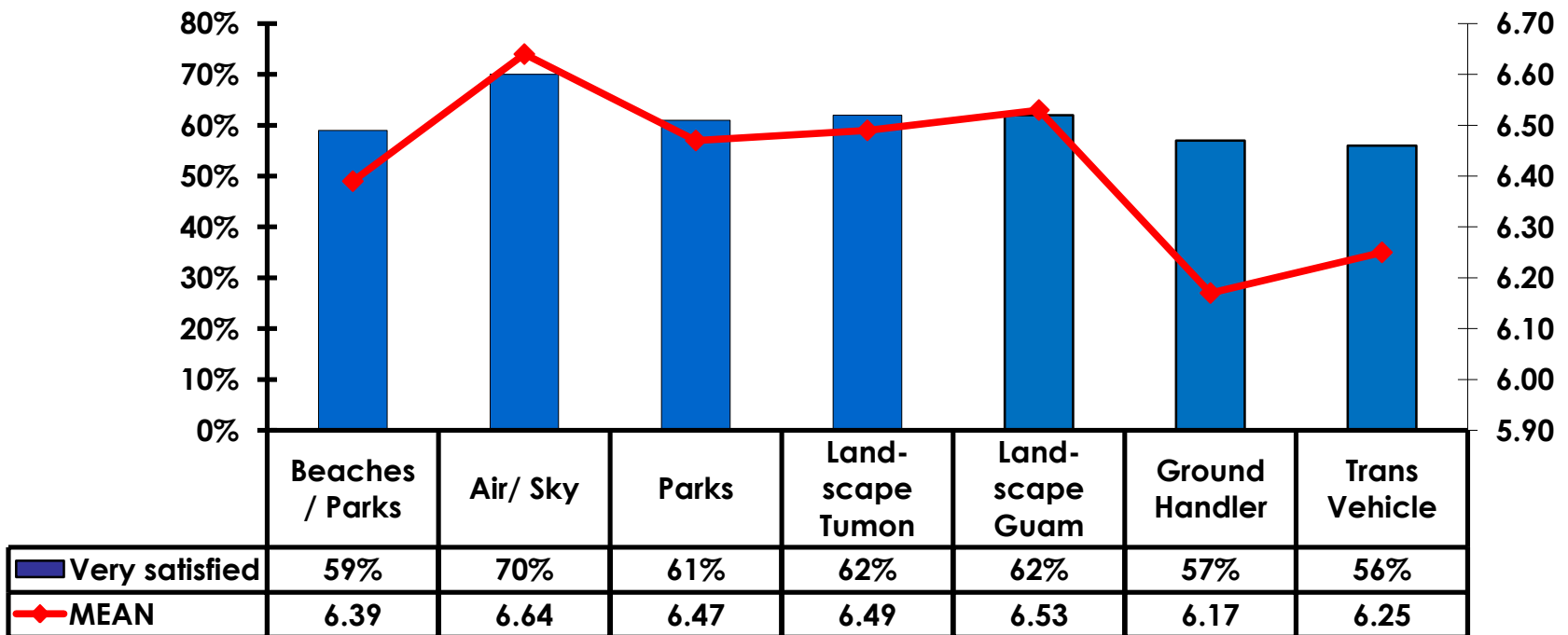
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

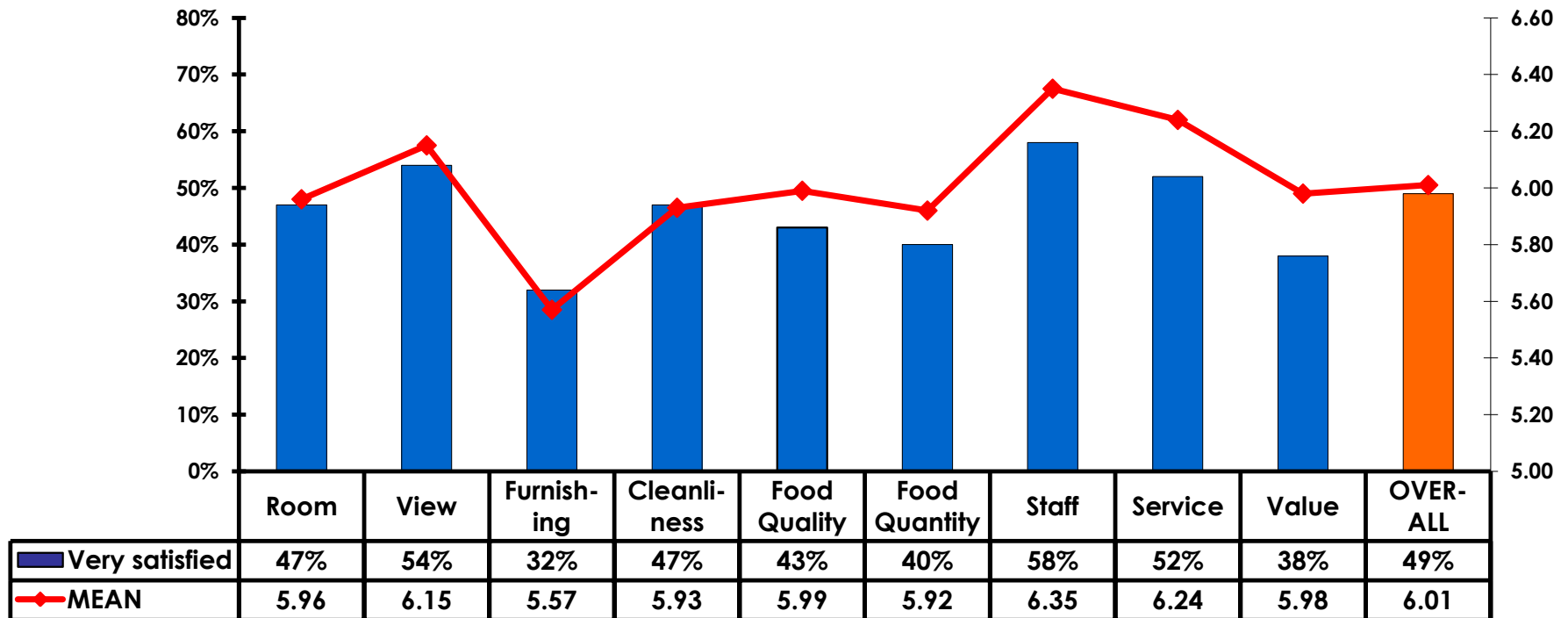
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

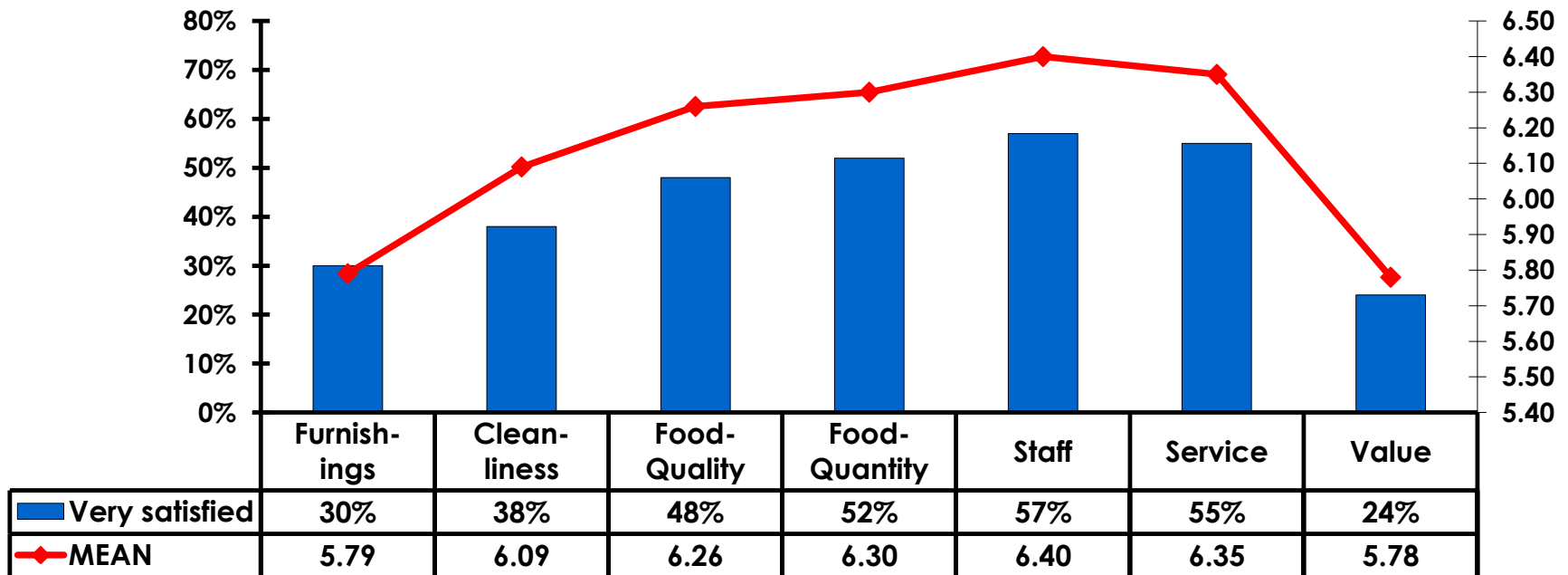
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

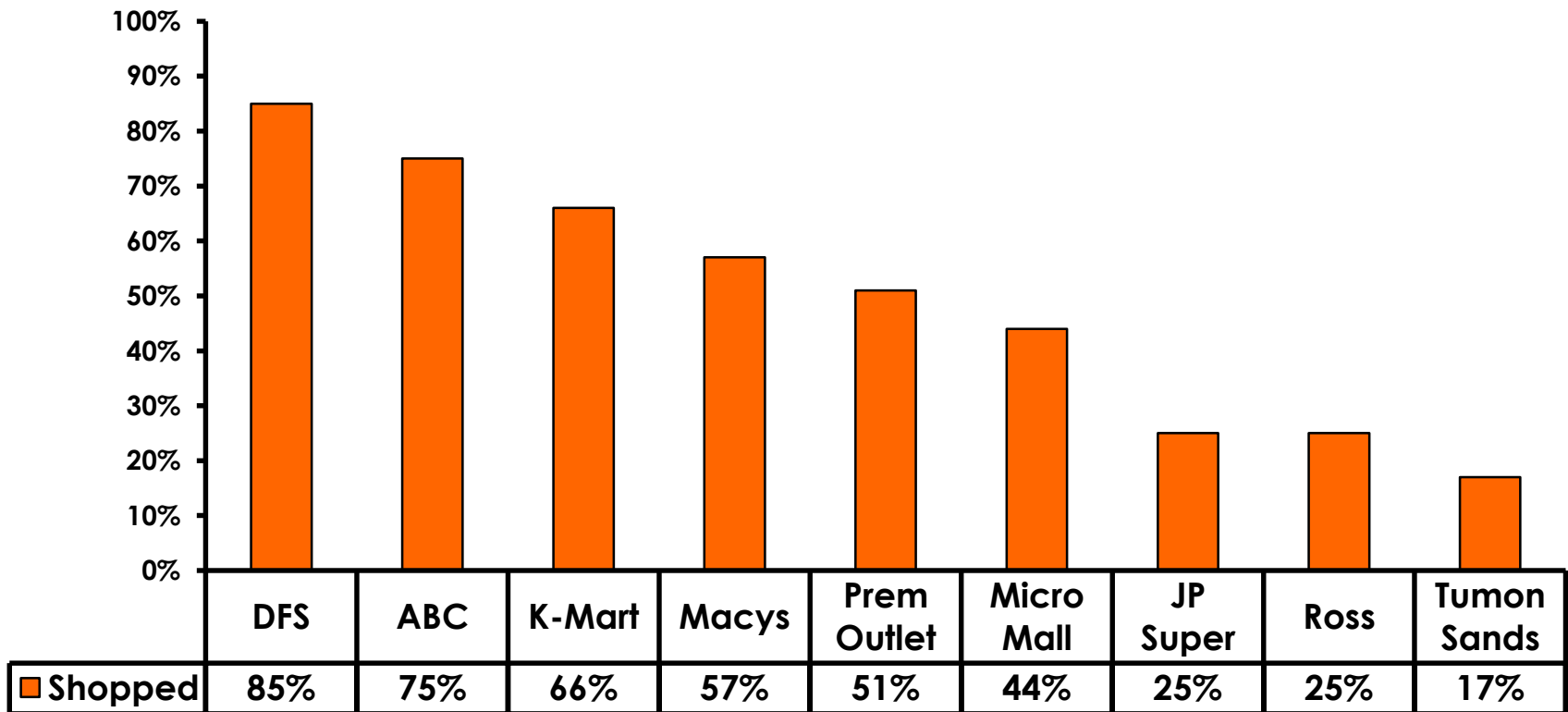
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



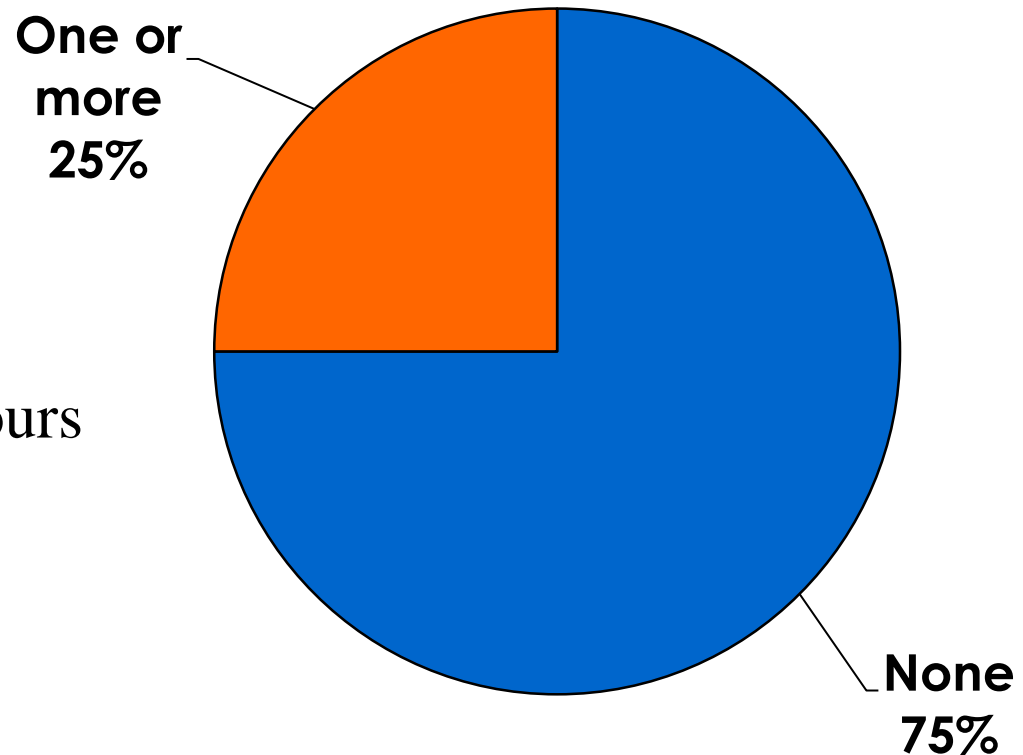
# Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>67%</b>	Score of 6 to 7 = <b>57%</b>
Score of 4 to 5 = <b>33%</b>	Score of 4 to 5 = <b>38%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>4%</b>
<b>MEAN = 5.87</b>	<b>MEAN = 5.64</b>

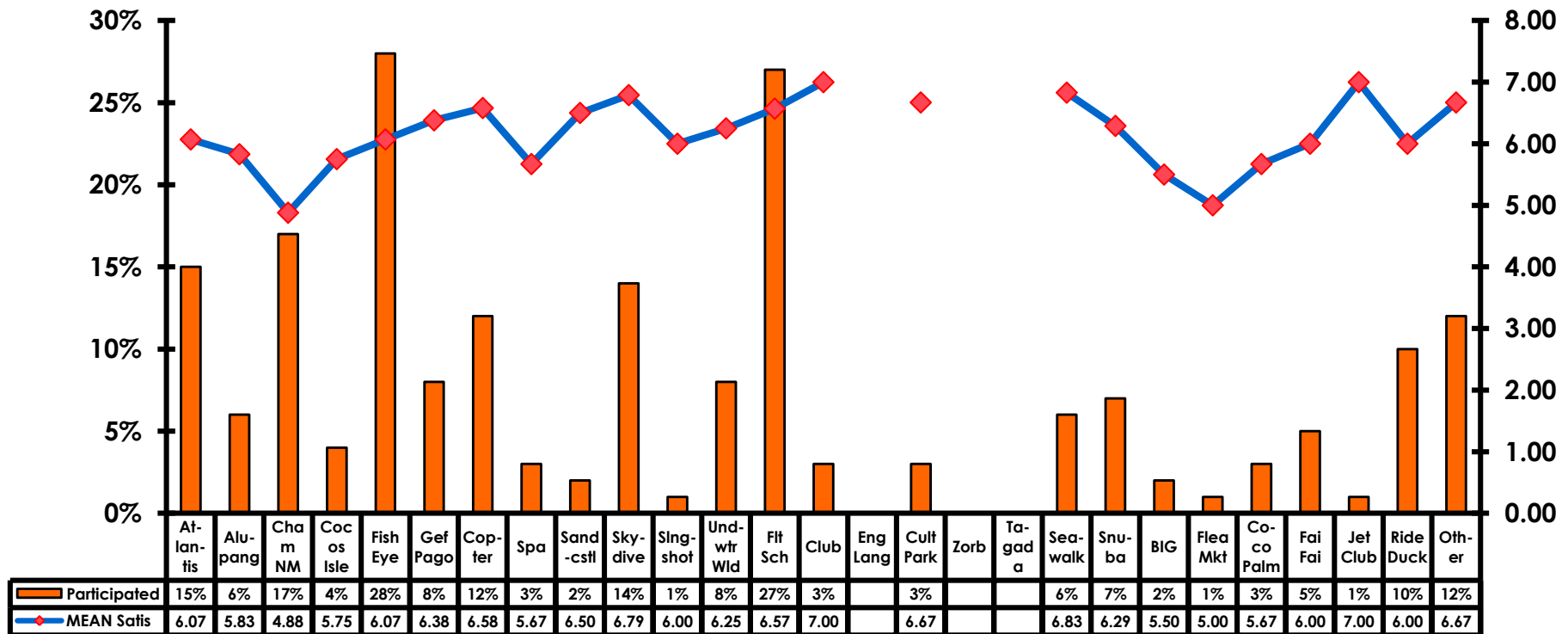
# Optional Tour Participation



- Average number of tours participated in is 2.11



# 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 = <b>87%</b>	Score of 6 to 7 = <b>79%</b>
Score of 4 to 5 = <b>13%</b>	Score of 4 to 5 = <b>20%</b>
Score 1 to 3 = <b>-%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 6.39</b>	<b>MEAN = 6.15</b>

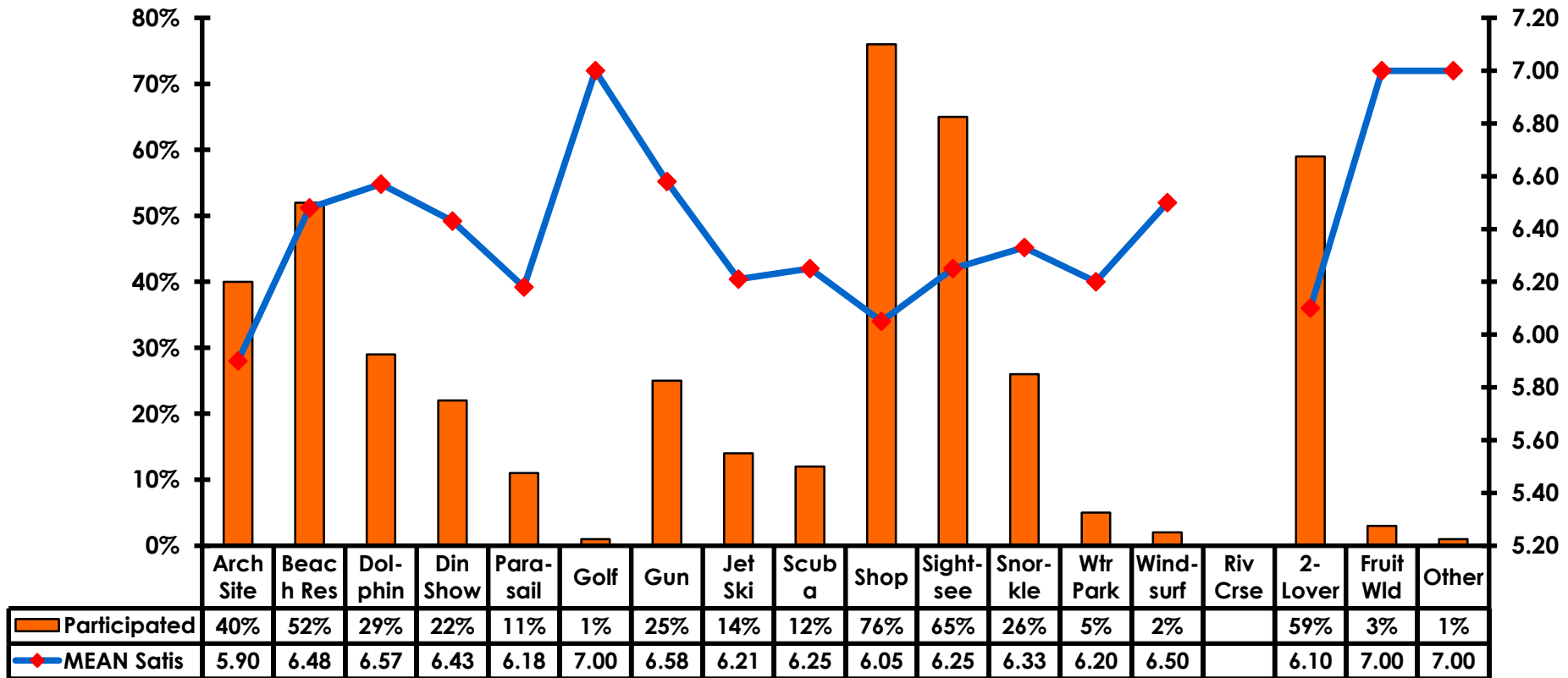
# Night Tours Satisfaction

7pt Rating Scale

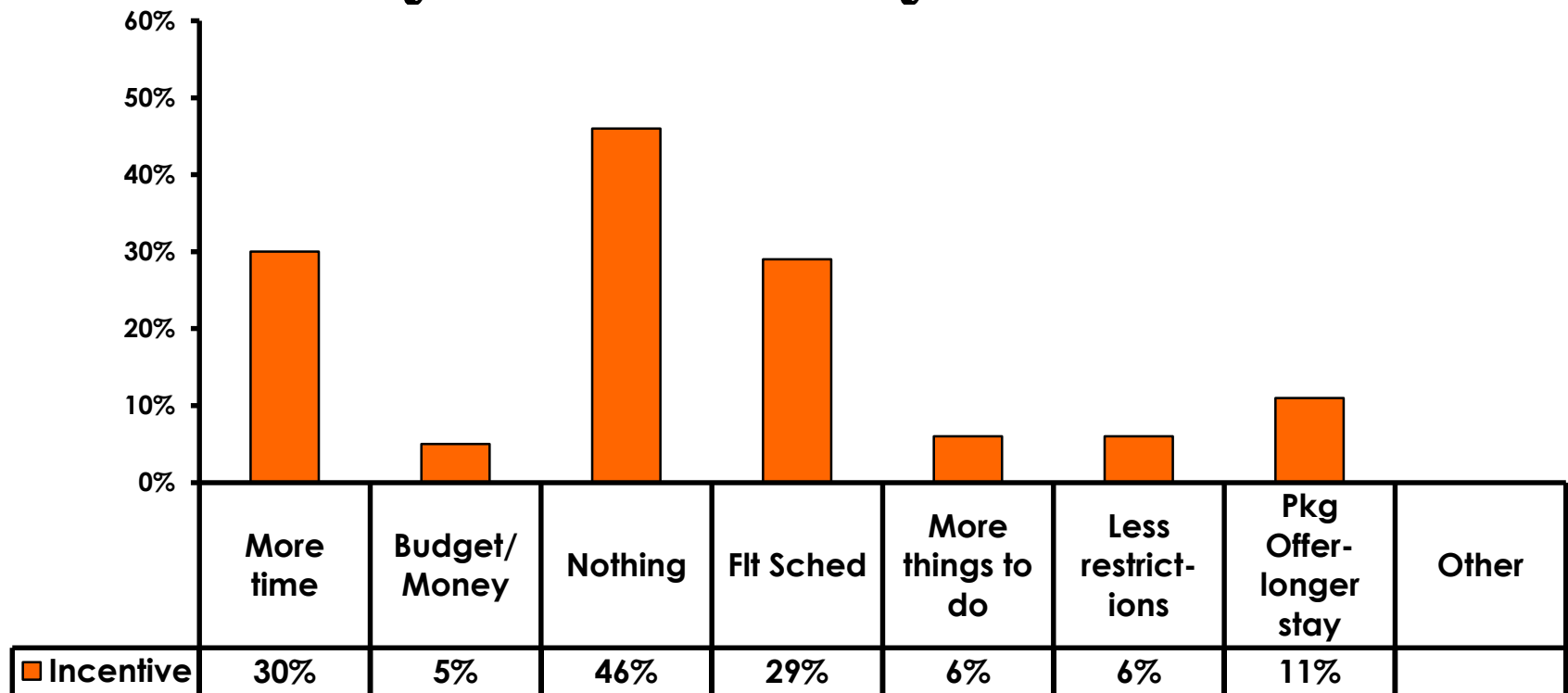
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>60%</b>	Score of 6 to 7 = <b>58%</b>
Score of 4 to 5 = <b>37%</b>	Score of 4 to 5 = <b>38%</b>
Score 1 to 3 = <b>2%</b>	Score 1 to 3 = <b>3%</b>
<b>MEAN = 5.65</b>	<b>MEAN = 5.58</b>

# Satisfaction with Other Activities



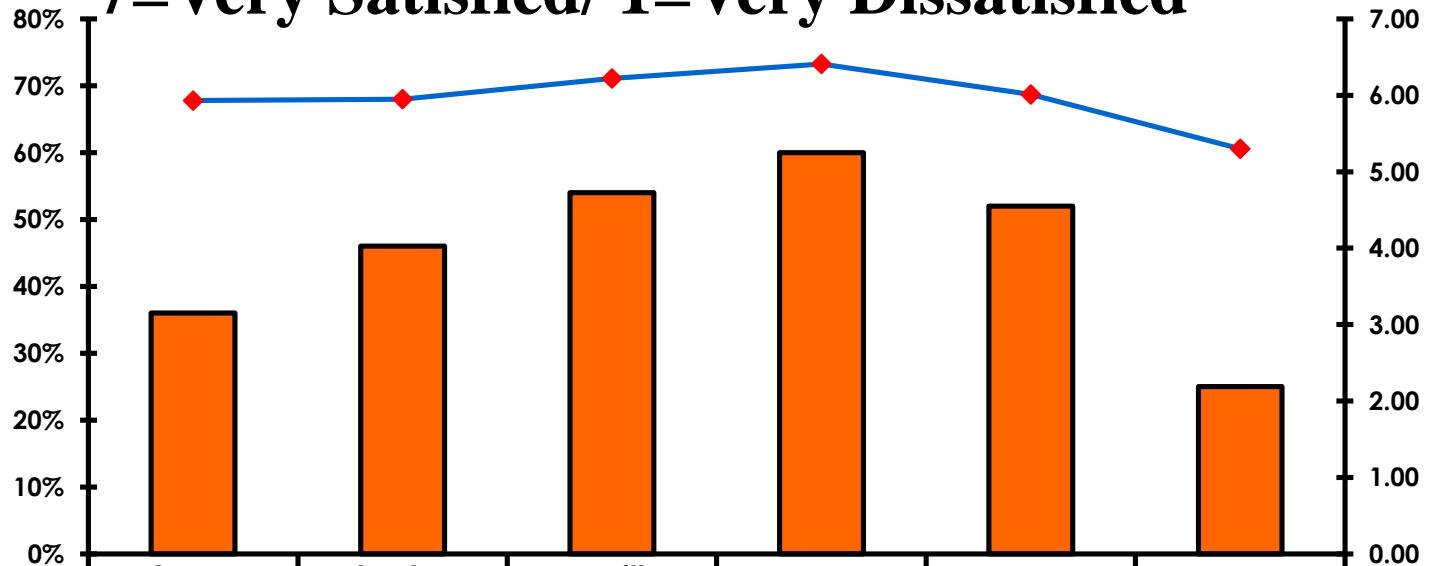
# What would it take to make you want to stay an extra day in Guam?





# On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

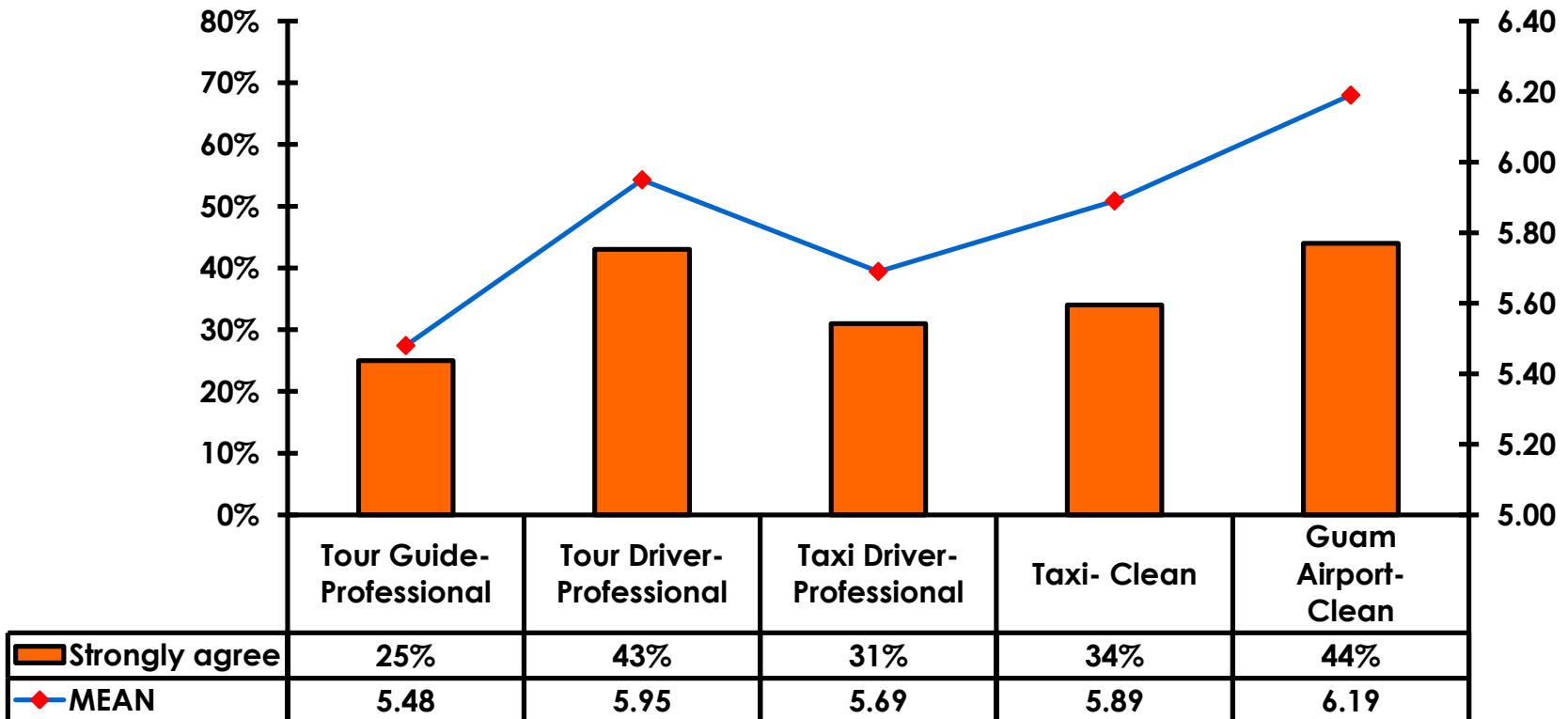


 Strongly agree	36%	46%	54%	60%	52%	25%
 MEAN	5.93	5.95	6.22	6.41	6.01	5.30

# On-Island Perceptions

7pt Rating Scale

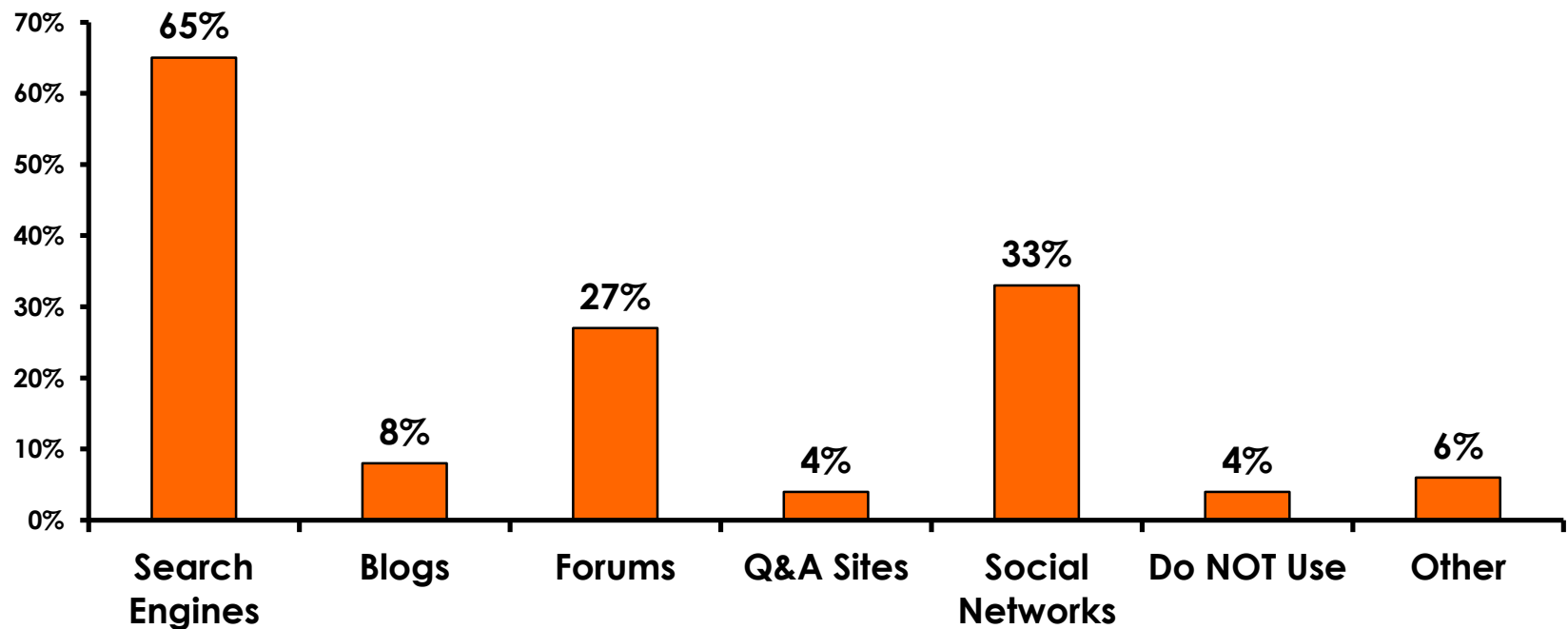
7=Very Satisfied/ 1=Very Dissatisfied



# SECTION 5 **PROMOTIONS**

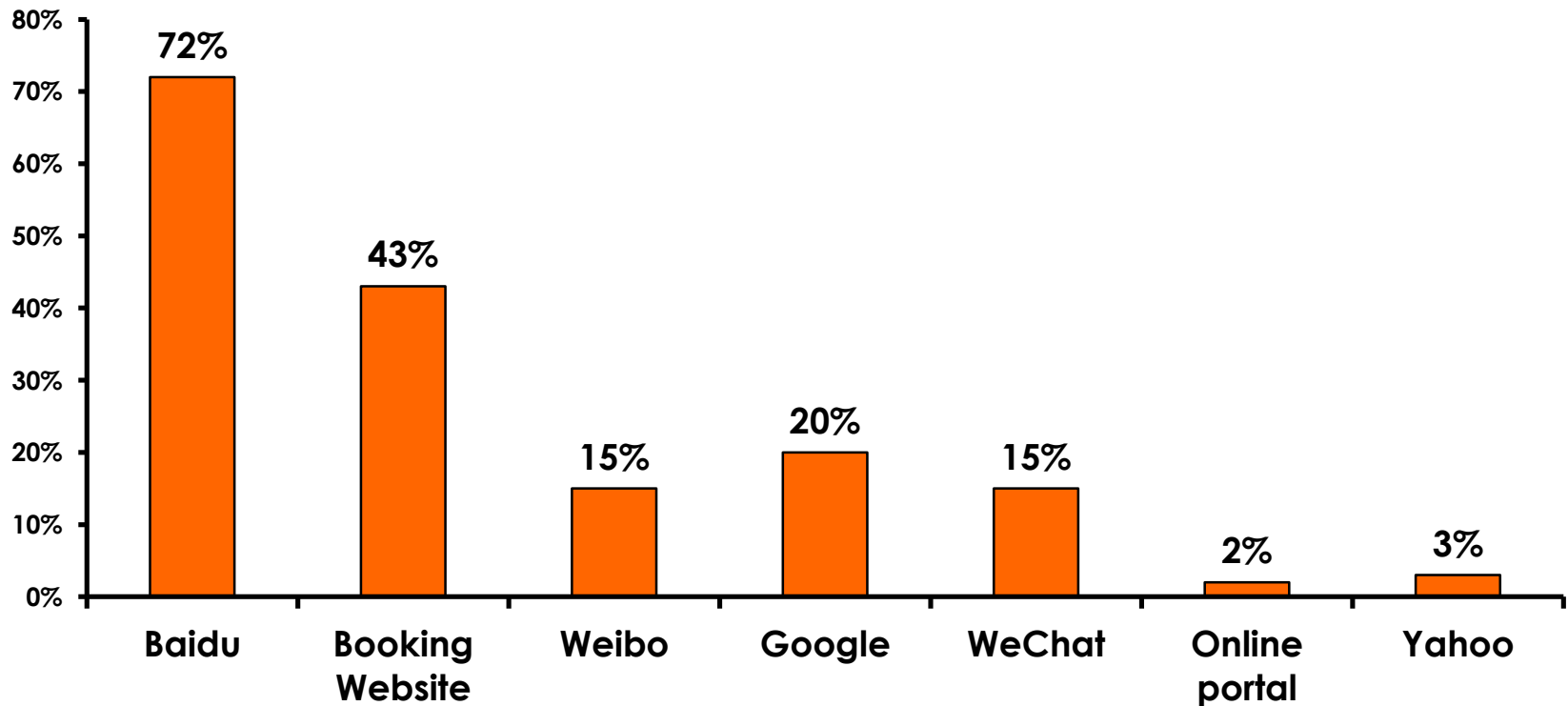


# Internet- Guam Sources of Info

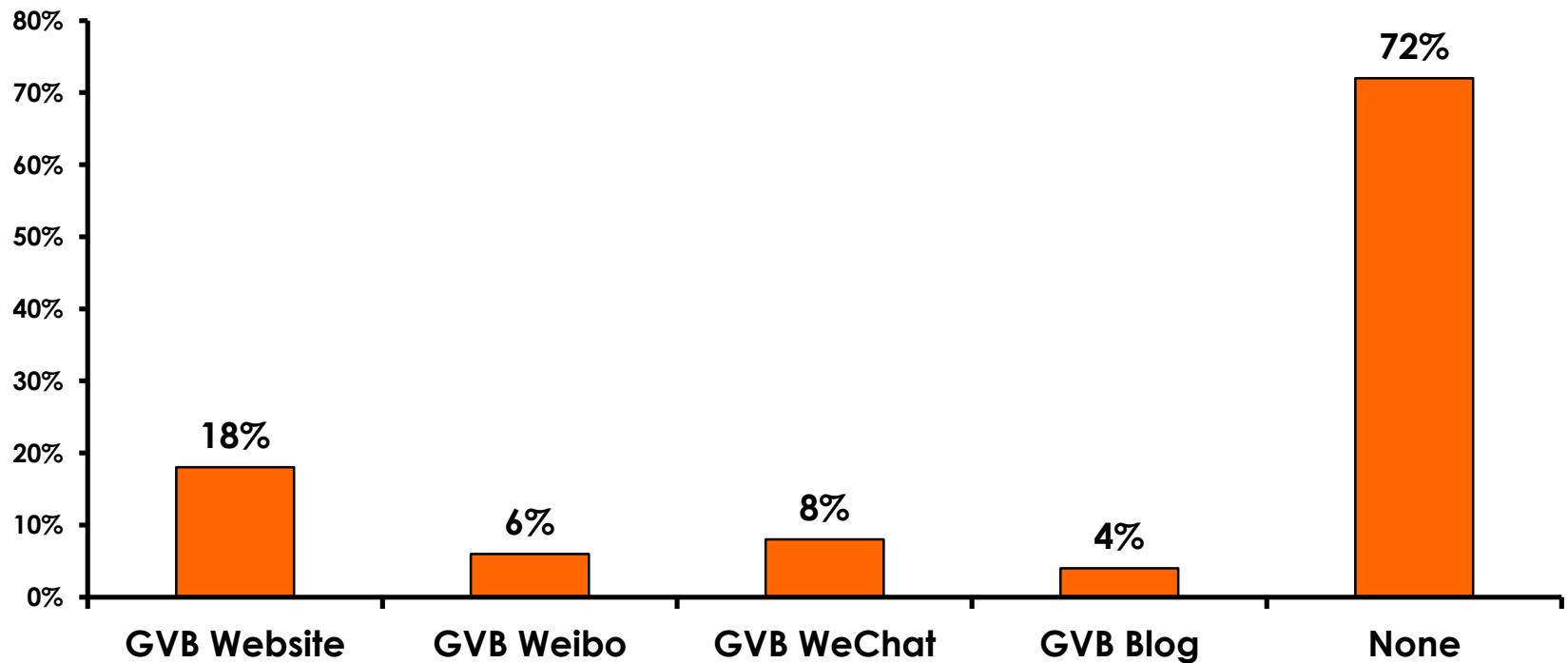


# Internet- Things To Do

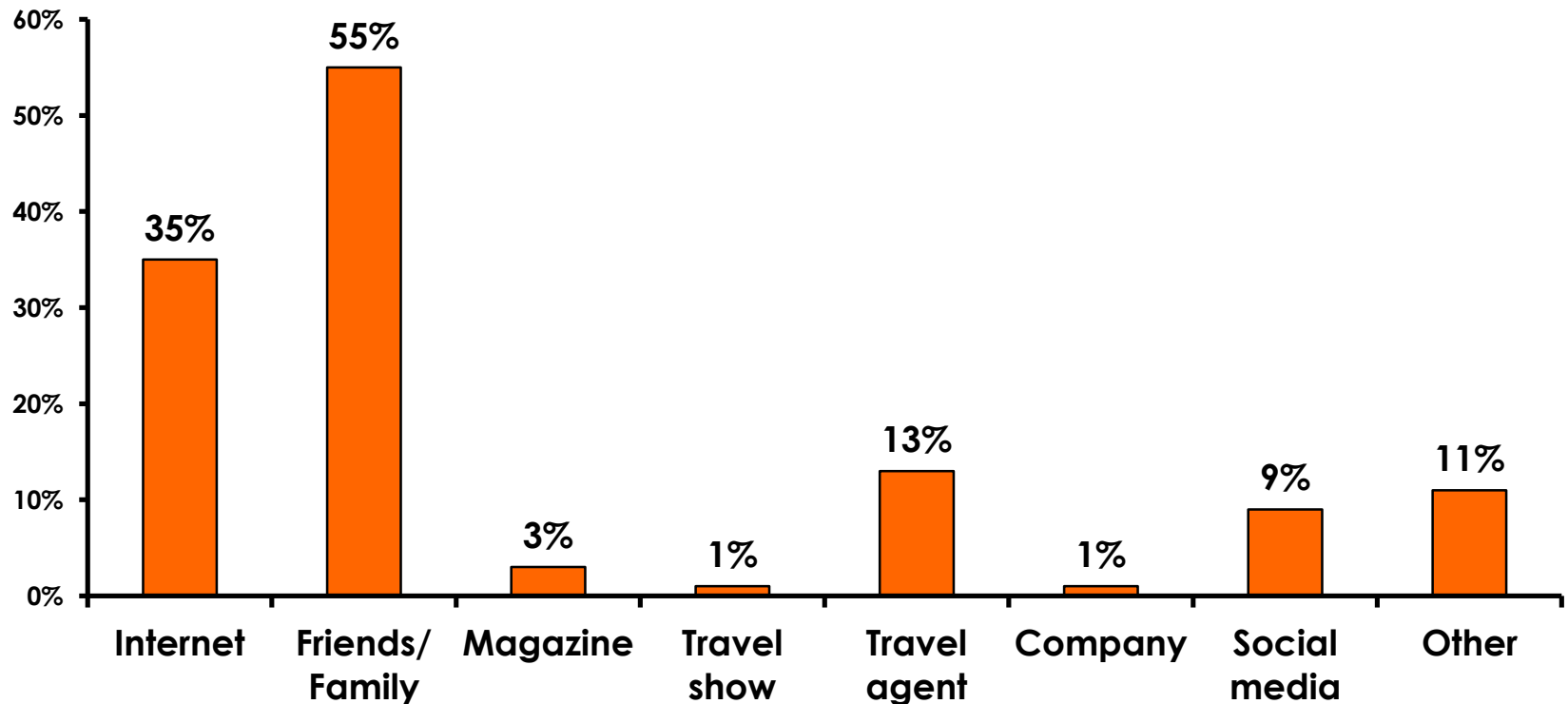
## Sources of Info



# Internet- GVB Sources

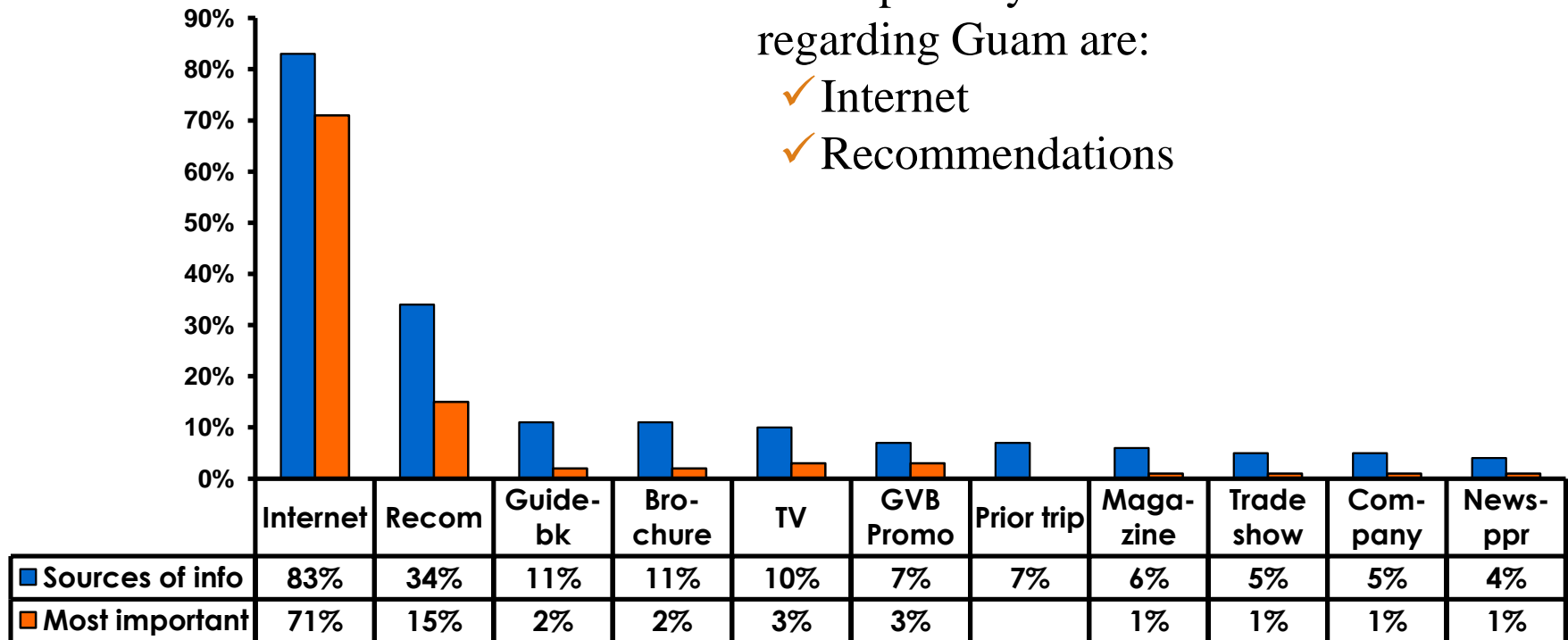


# Travel Motivation- Info Sources



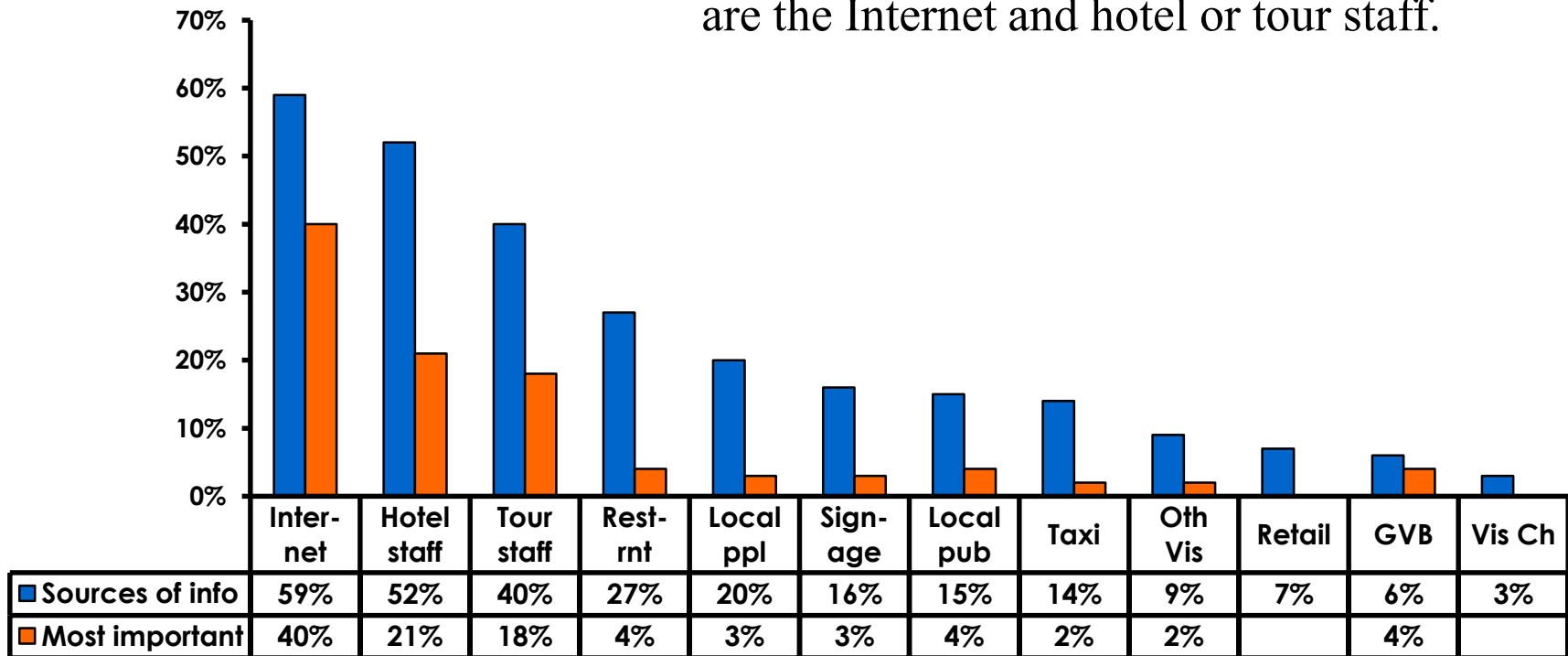
# Sources of Information Pre-arrival

- The 2 primary sources of information regarding Guam are:
  - ✓ Internet
  - ✓ Recommendations



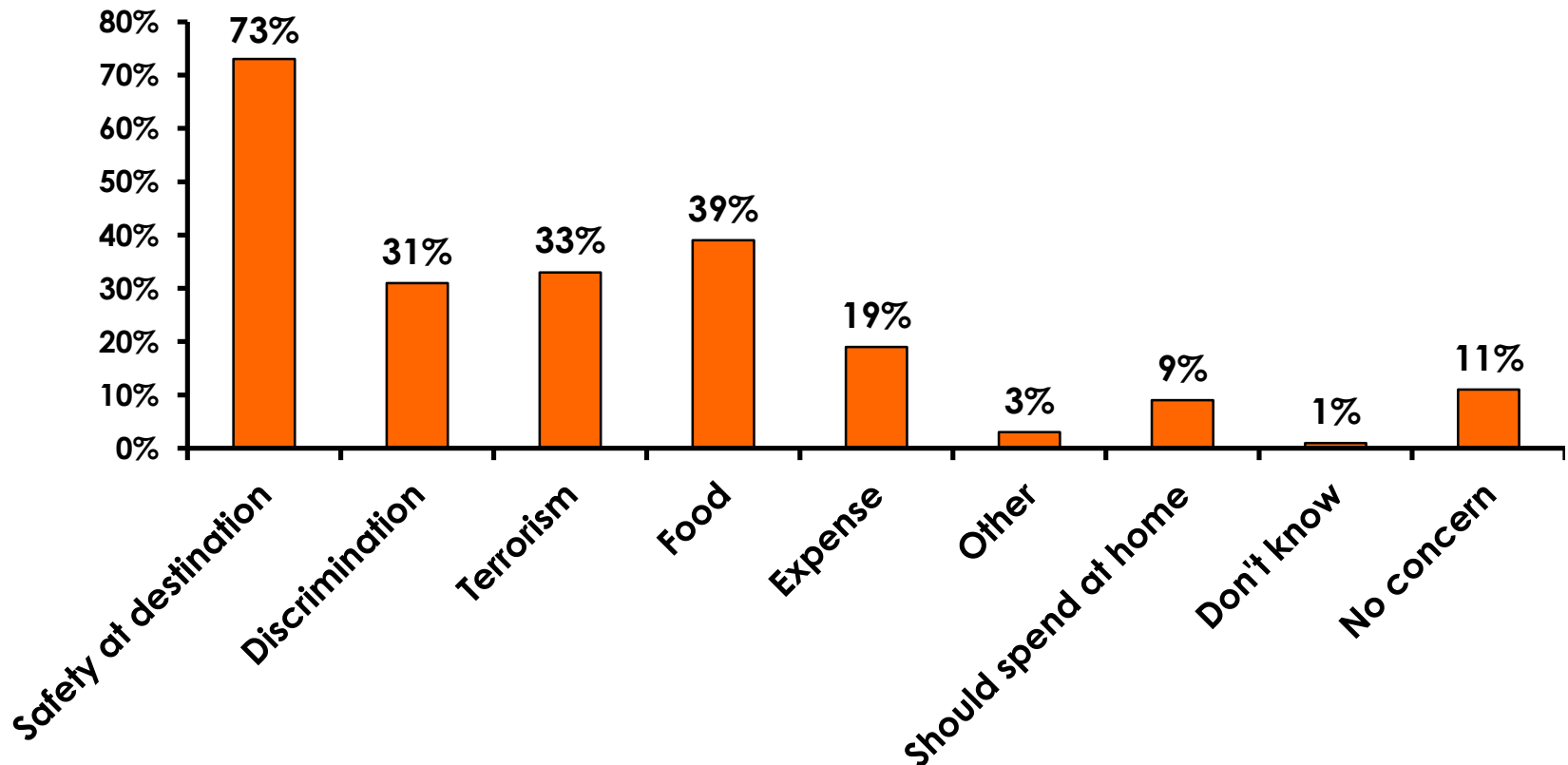
# Sources of Information Post-arrival

- 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

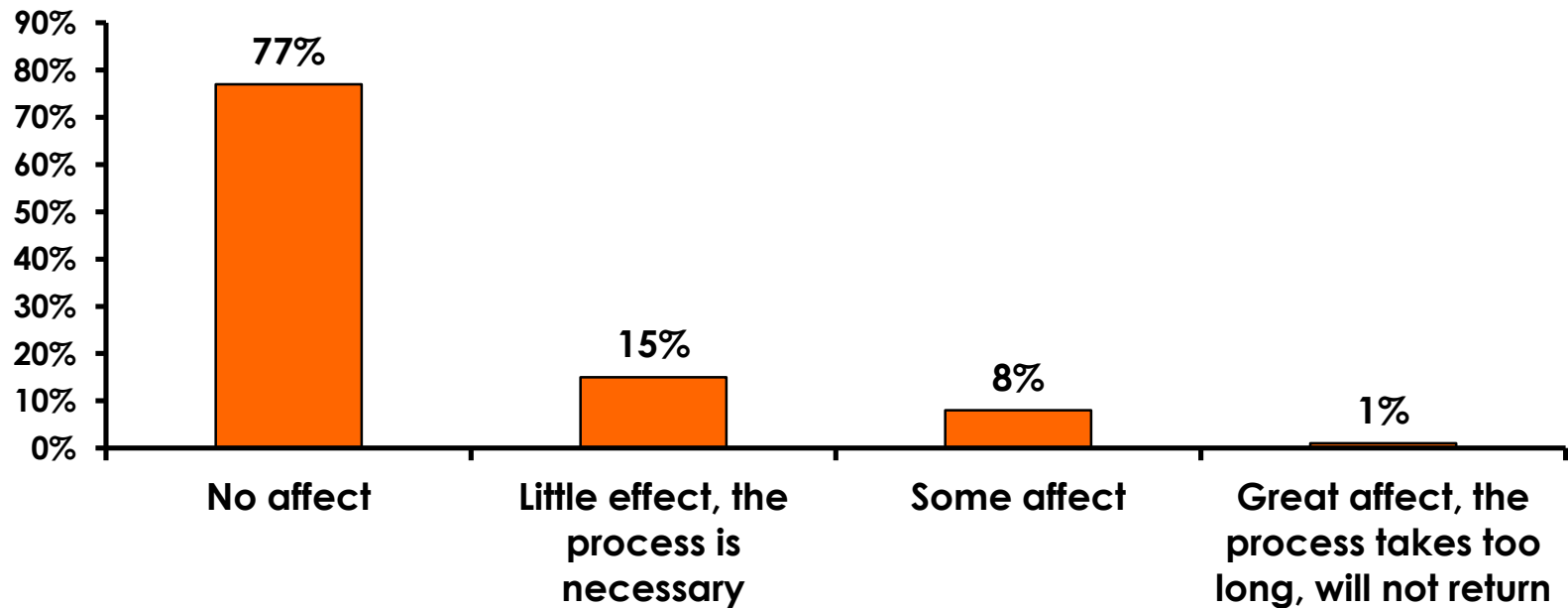




# Concerns about travel outside of China - By Age & Income

		TOTAL	AGE				Q26						
		-	18-24	25-34	35-49	50+	<=CNY40K	CNY40K - CNY60K	CNY60K - CNY80K	CNY80K - CNY120K	CNY120K - CNY240K	CNY240K+	No Income
Q21	Safety	73%	33%	82%	74%	46%	50%	75%	80%	60%	72%	79%	
	Food	39%		37%	41%	54%	50%	50%	30%	40%	48%	33%	
	Terrorism	33%	67%	39%	29%	15%	50%	25%	20%	20%	40%	38%	
	Discrimination against Chinese	31%	33%	37%	24%	31%		75%	10%	27%	28%	38%	
	Expense	19%		20%	18%	23%		25%	20%	13%	24%	19%	
	No concerns	11%		6%	15%	23%			10%	20%	4%	14%	
	Should spend at home	9%	33%	12%	3%	8%	50%			13%	20%	2%	
	Other	3%			6%	8%				7%		5%	
	Don't know	1%	33%							7%			
	Total	Count	99	3	49	34	13	2	4	10	15	25	42

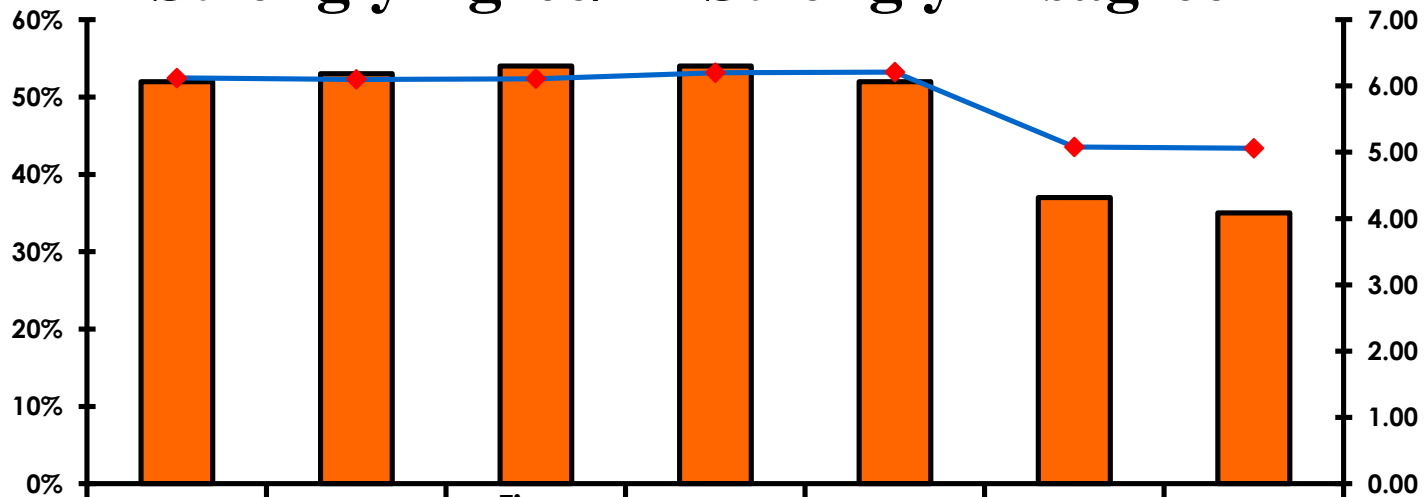
# Security Screening/ Immigration Process at Guam International Airport





# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



 Strongly agree	52%	53%	54%	54%	52%	37%	35%
 MEAN	6.12	6.10	6.11	6.20	6.21	5.08	5.06

# U.S. VISA

