

Guam Visitors Bureau

Chinese Visitor Tracker Exit Profile

FY2017 DATA AGGREGATION

Prepared by: Anthology Research

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Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Chinese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **623** departing Chinese 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 **623** is +/- 3.93 percentage points with a 95% confidence level. That is, if all Chinese 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 +/- 3.93 percentage points.

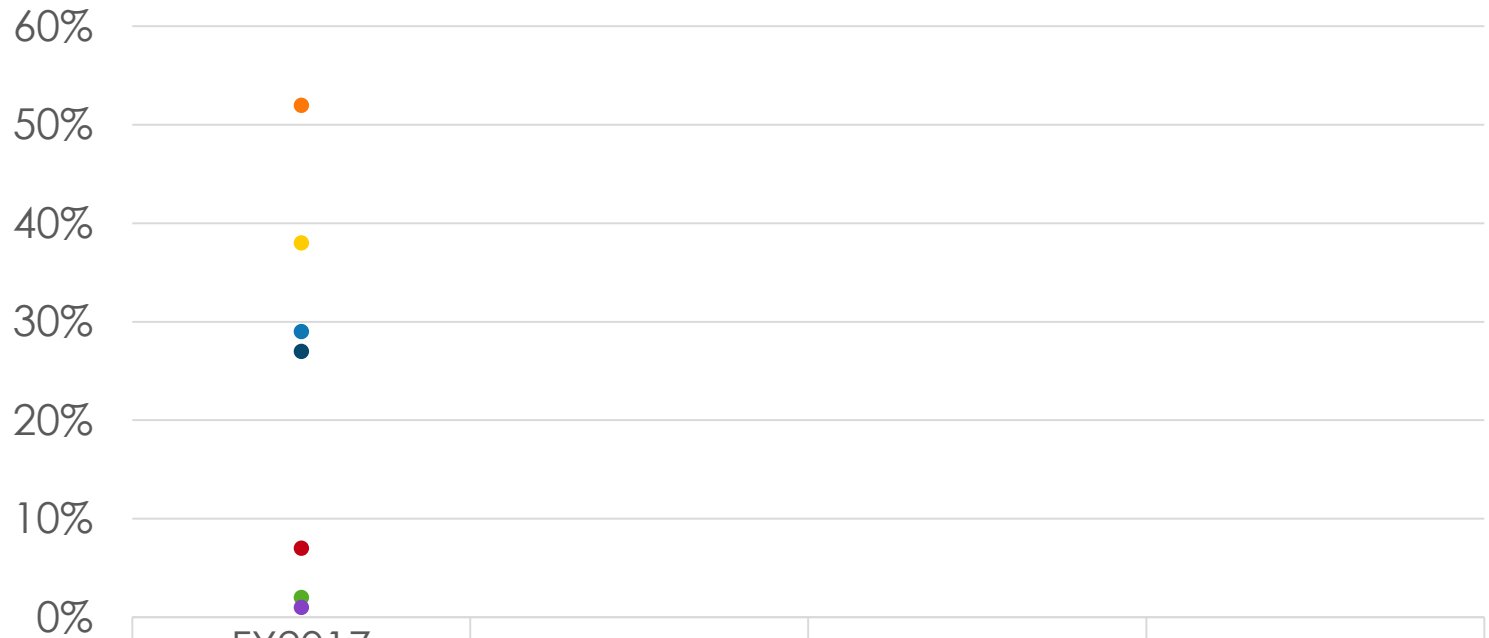
Objectives

- To monitor the effectiveness of the China seasonal campaigns in attracting Chinese 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.

Key Highlighted Segments

- **The specific objectives were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - FITs (Q7)
 - Wedding (Q5A)
 - Honeymoon (Q5A)
 - Family (Q5)
 - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)
 - Sports/ Adventure Traveler (Q5A Organized sporting activity/ Scuba/ Water sports, Q18 Skydiving, Q19 Scuba, Snorkel, Windsurf)
 - Education (Q18 English language lesson, Flight school / Q5A Career certification/ testing)
 - To identify the most significant factors affecting overall visitor satisfaction.
 - To identify (for all Chinese visitors) the most important determinants of on-island spending

Key Segments

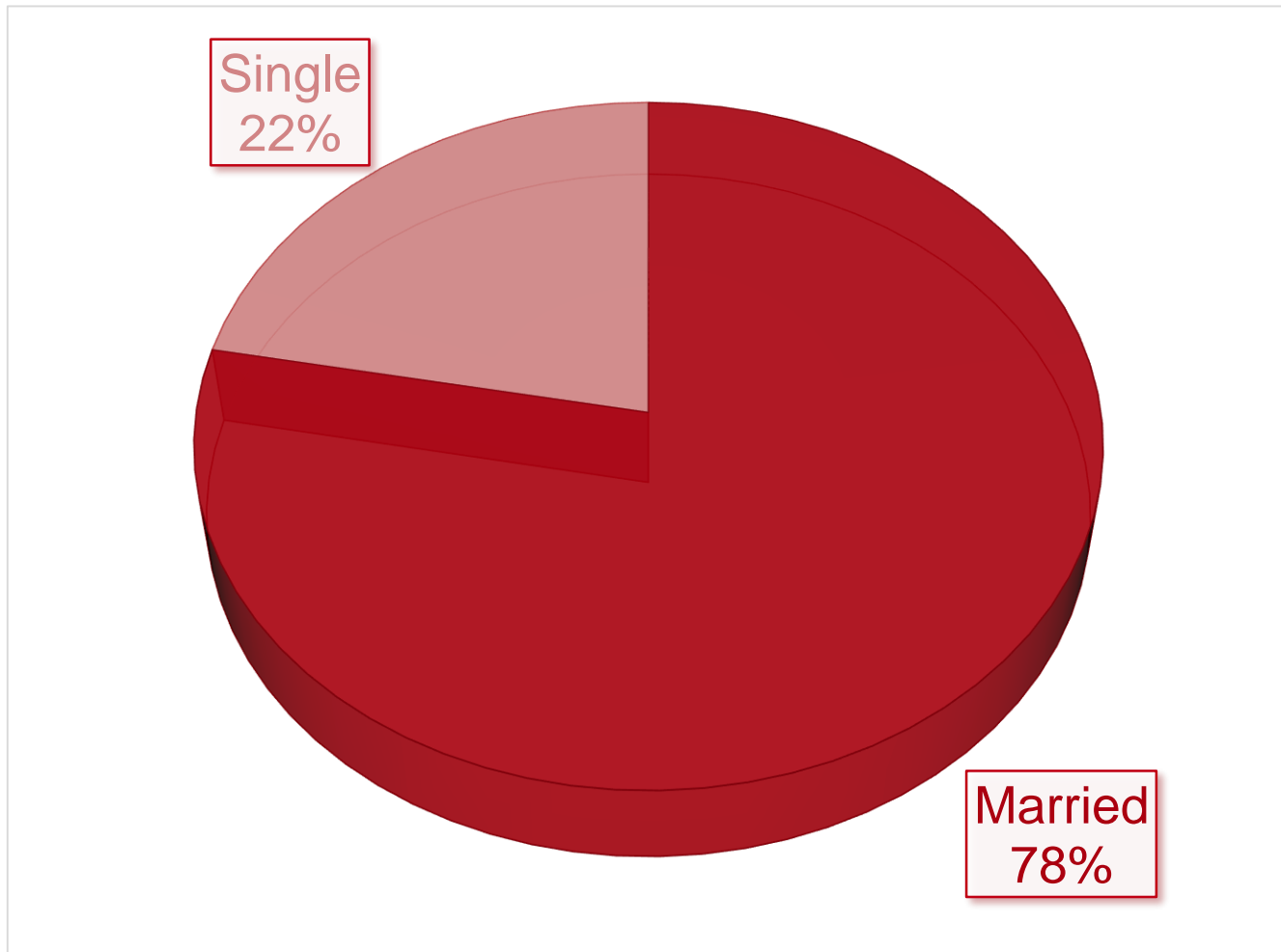


	FY2017			
—●— FITs	29%			
—●— Honeyymoon	7%			
—●— Wedding	2%			
—●— Family	38%			
—●— MICE	1%			
—●— Sports/ Adv	52%			
—●— Education	27%			

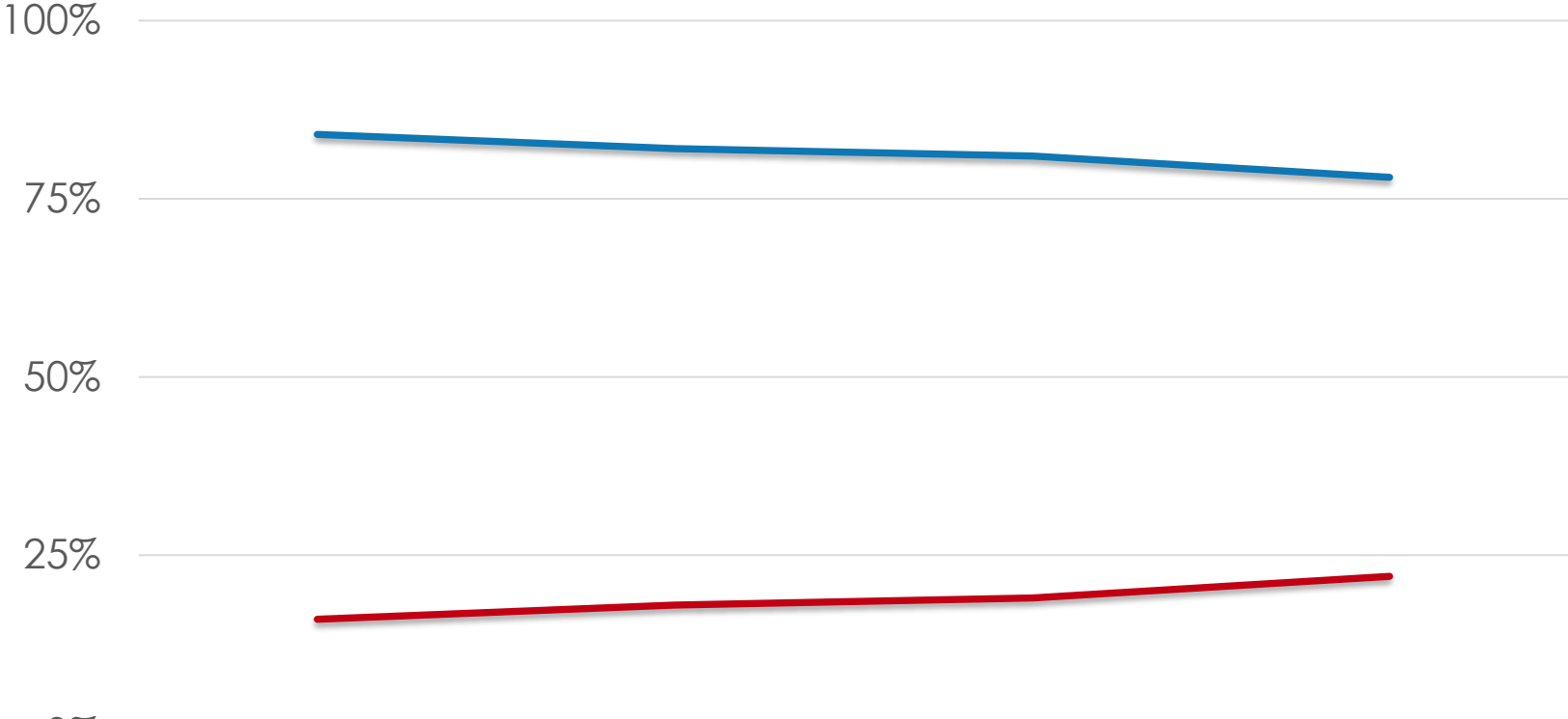
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



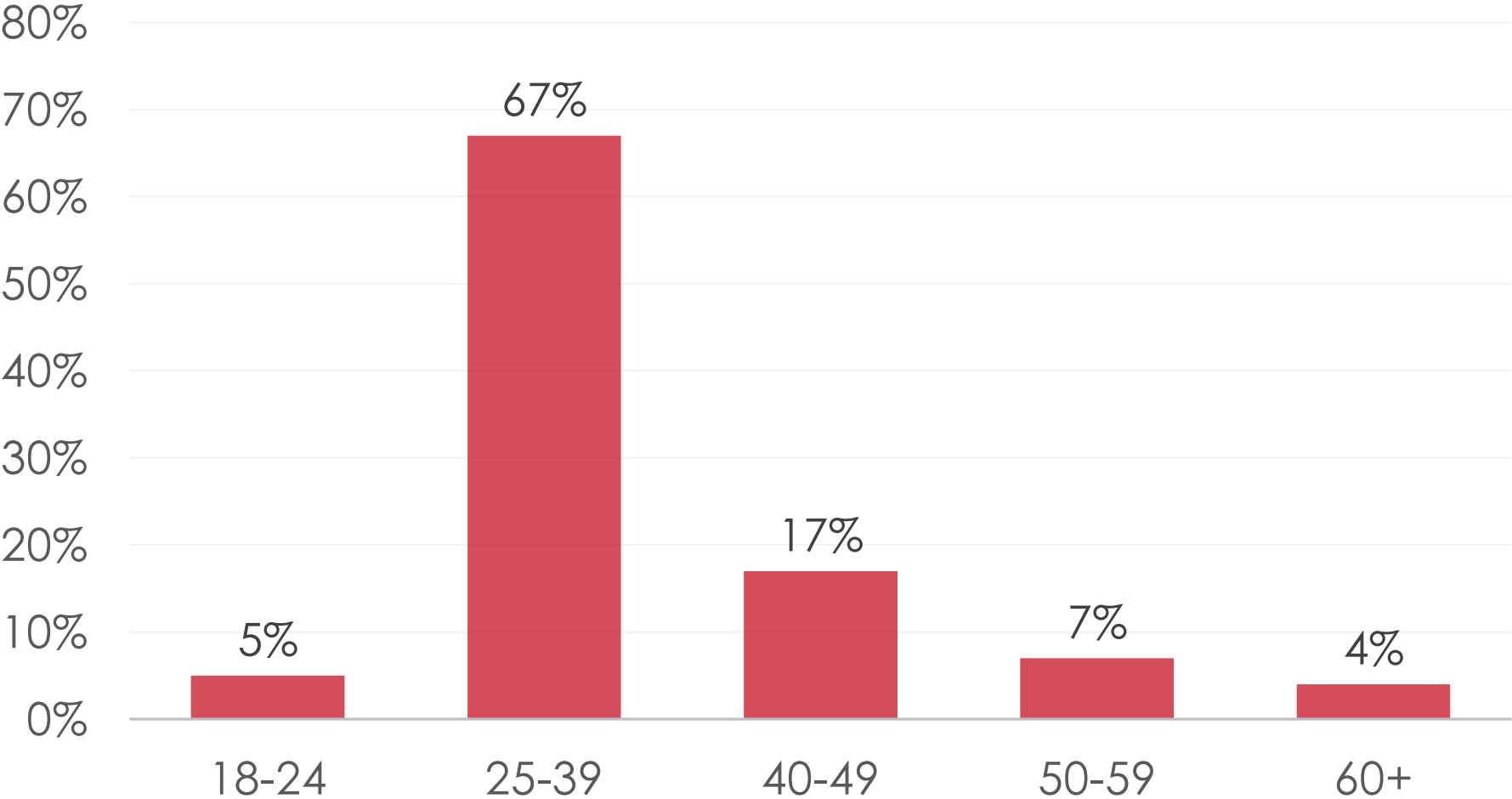
Marital status – Tracking



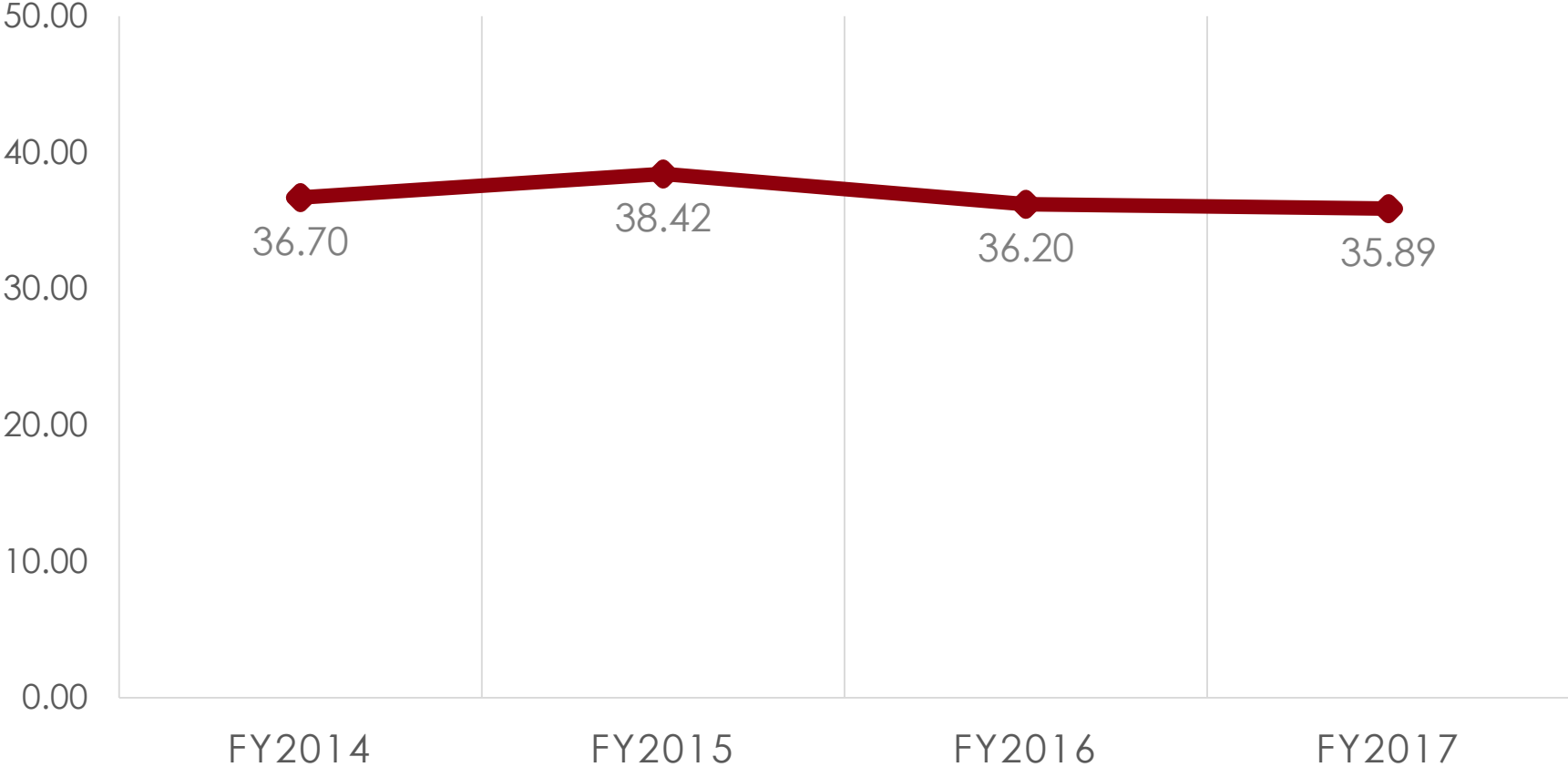
	FY2014	FY2015	FY2016	FY2017
— Married	84%	82%	81%	78%
— Single	16%	18%	19%	22%

Age

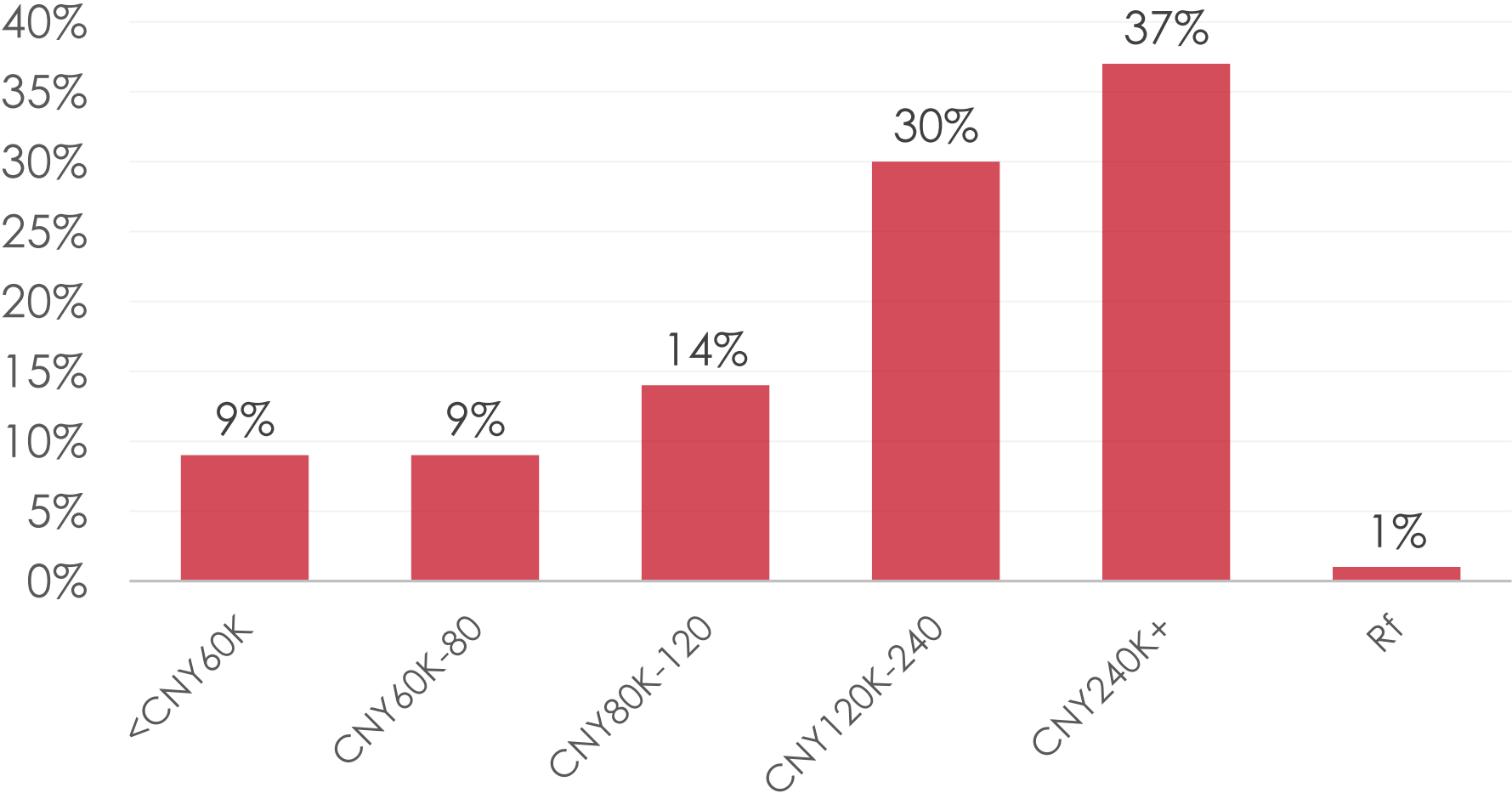
MEAN = 35.89
MEDIAN = 34



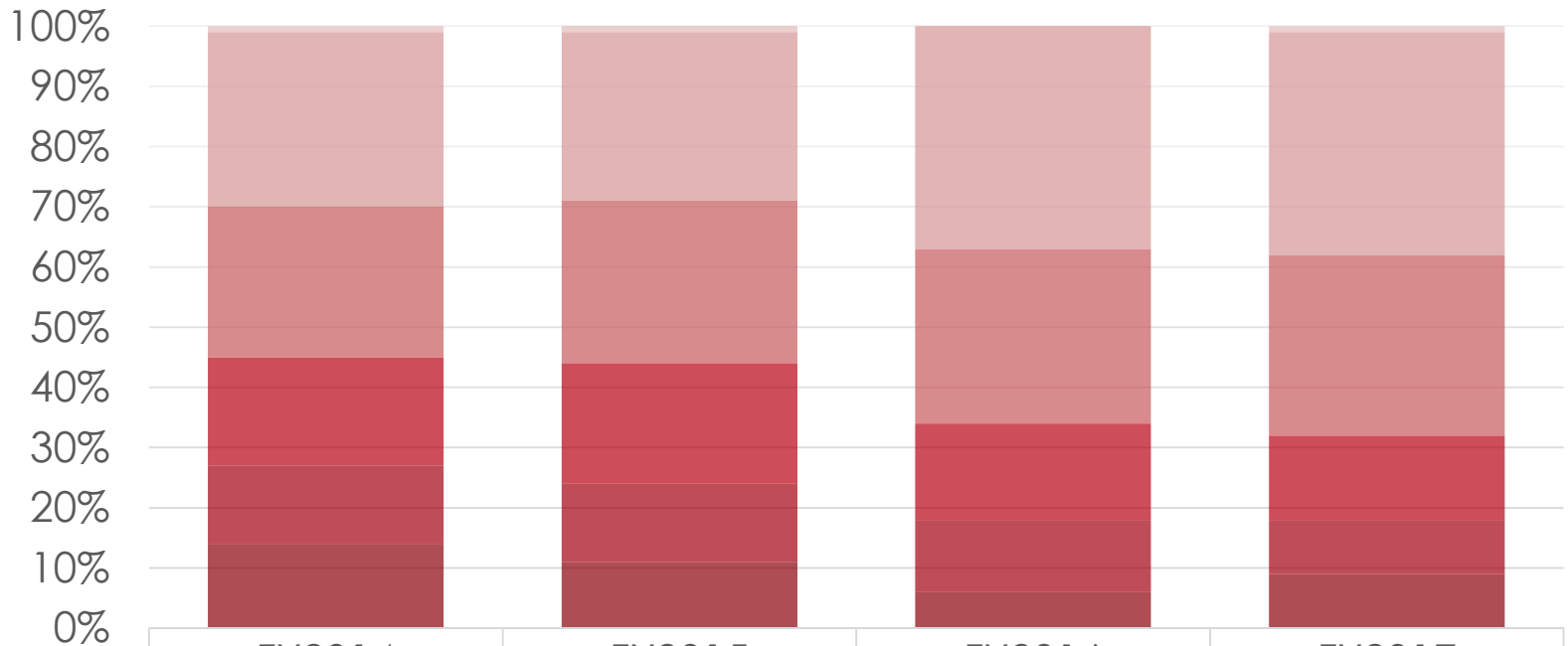
Age –Tracking



Annual Household Income

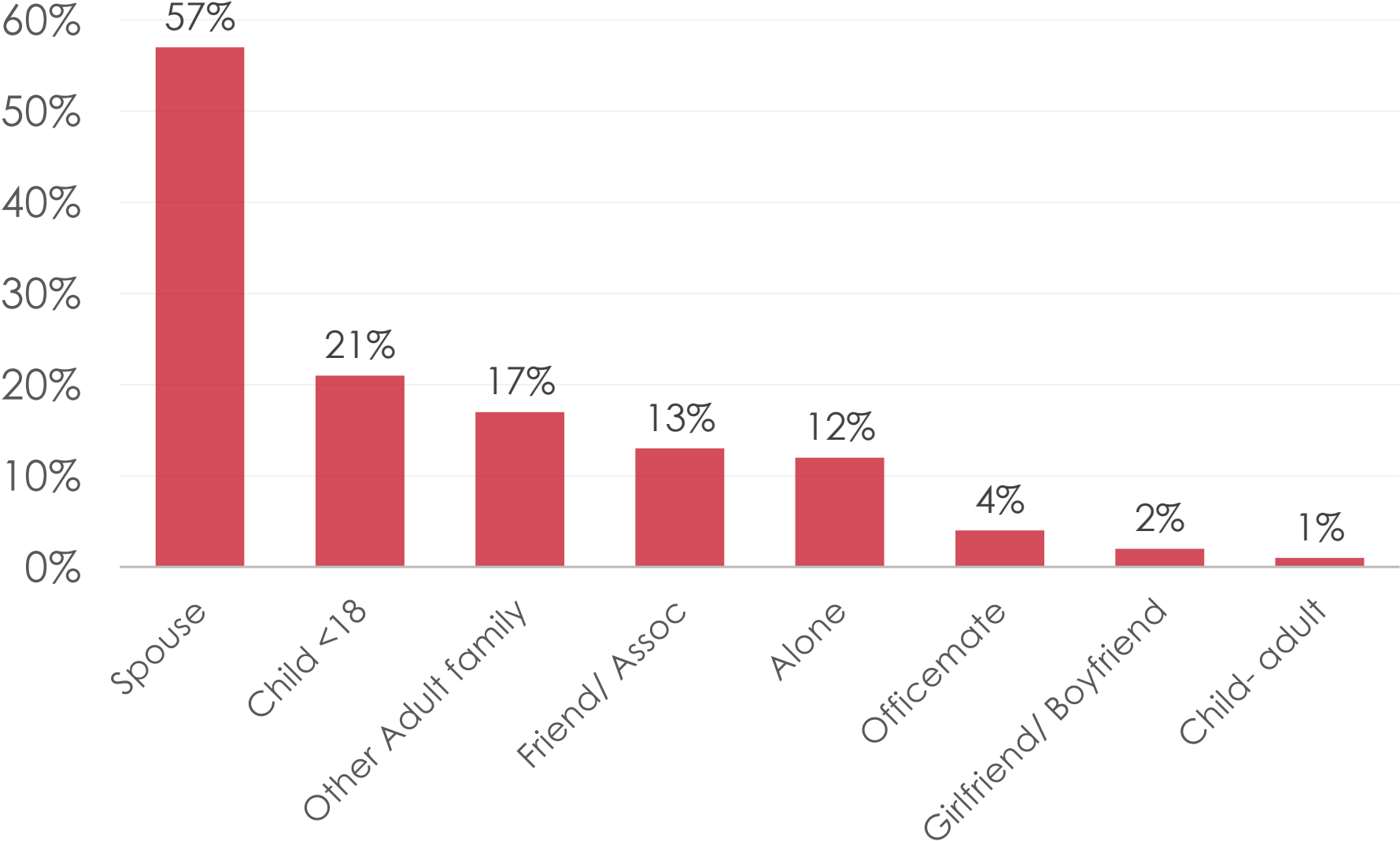


Annual Household Income - Tracking

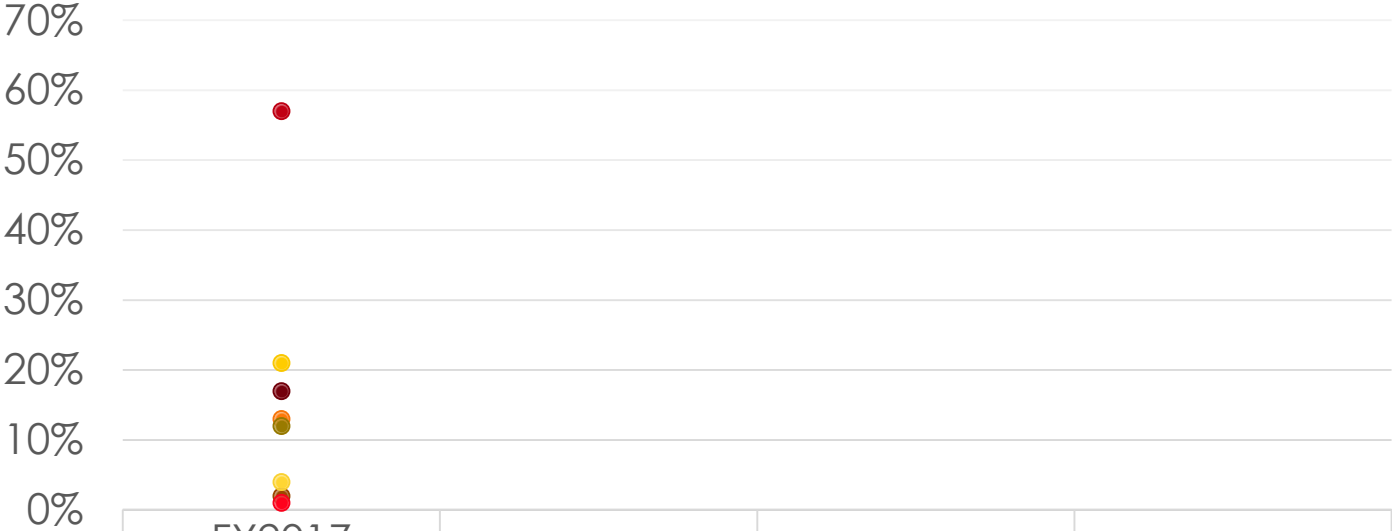


	FY2014	FY2015	FY2016	FY2017
Rf	1%	2%	1%	1%
CNY240K+	29%	28%	37%	37%
CNY120K-240	25%	27%	29%	30%
CNY80K-120	18%	20%	16%	14%
CNY60K-80	13%	13%	12%	9%
<CNY60K	14%	11%	6%	9%

Travel Party

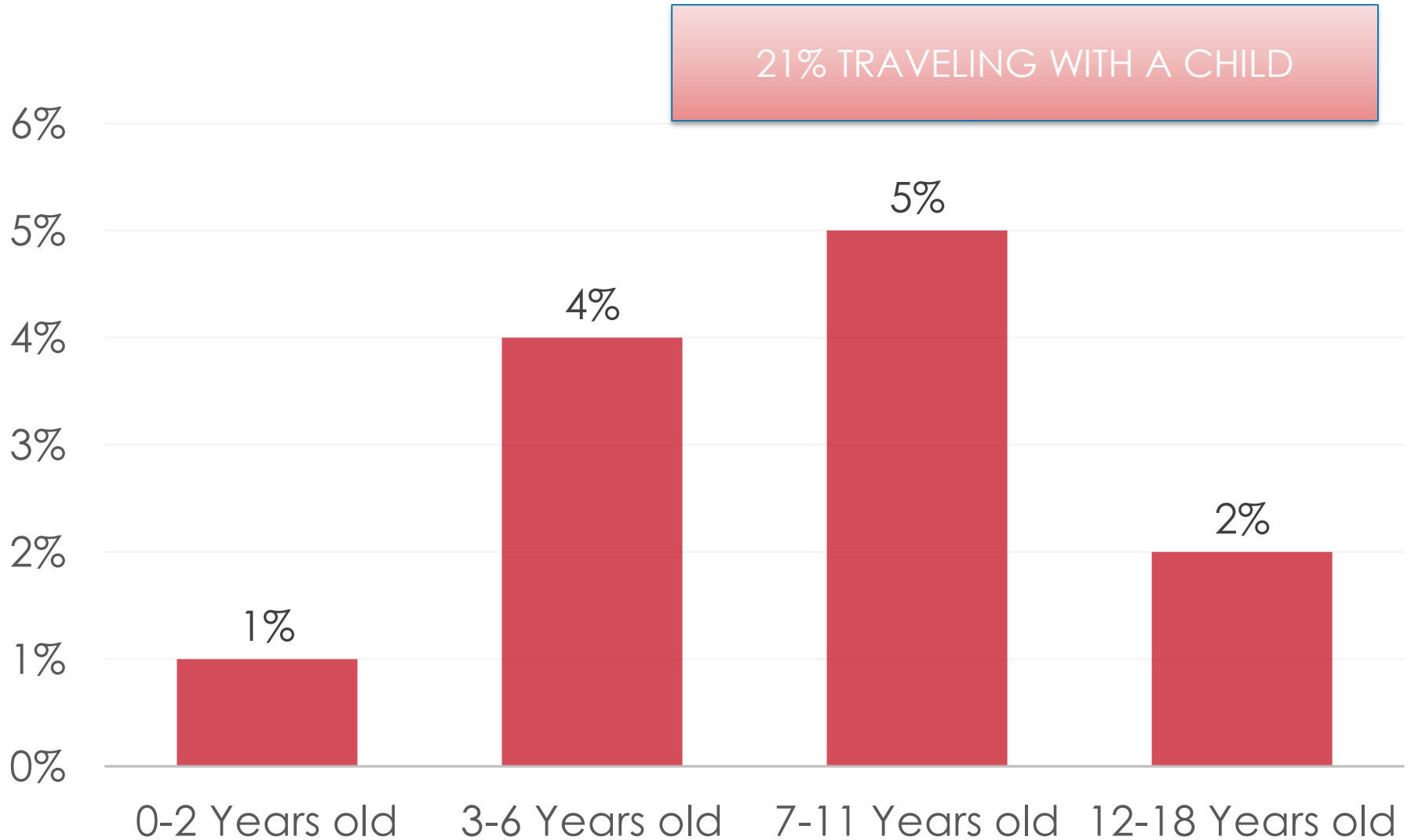


Travel Party

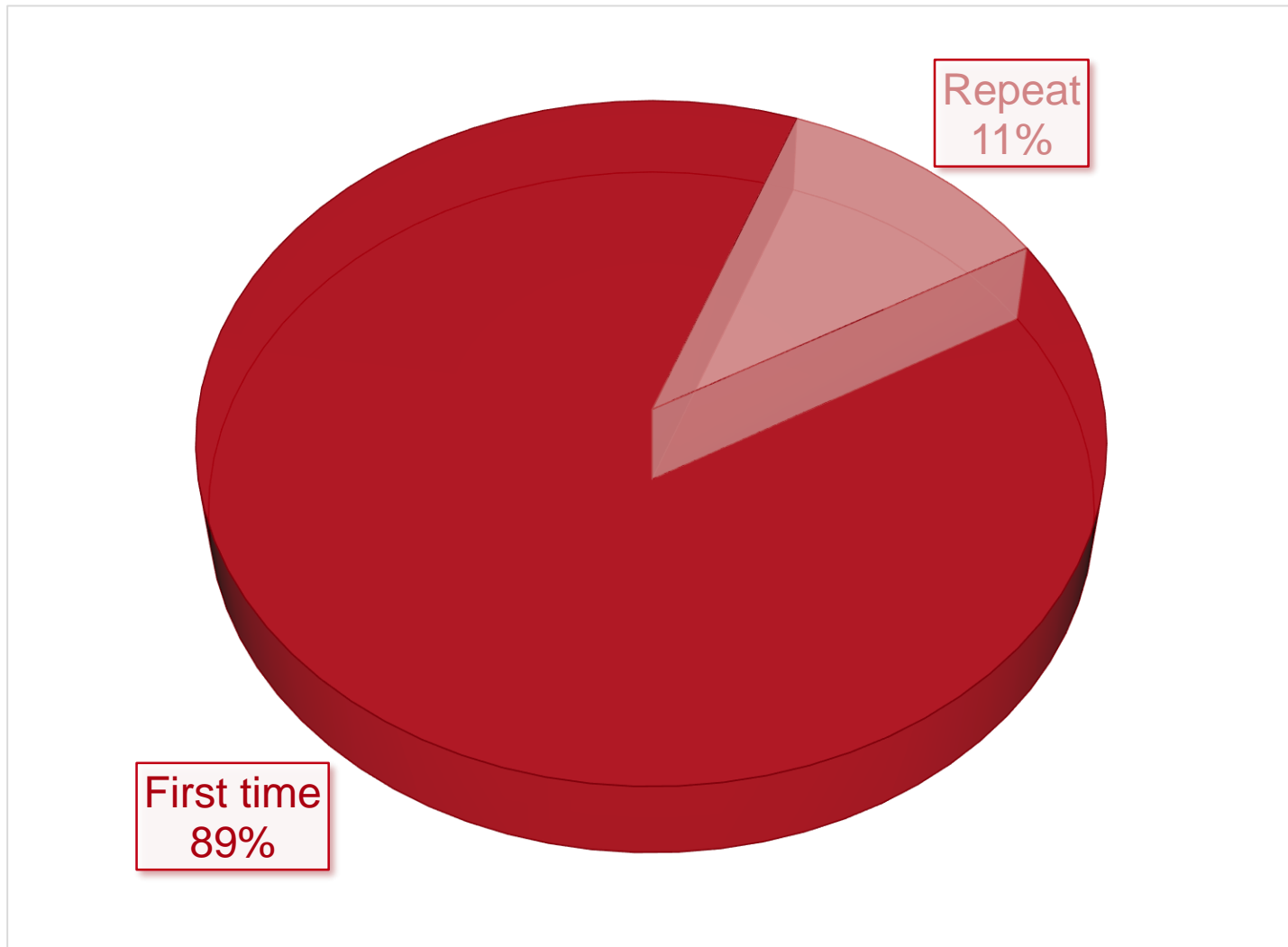


	FY2017			
Spouse	57%			
Child <18	21%			
Friend/ Assoc	13%			
Other Adult Family	17%			
Alone	12%			
Girlfriend/ Boyfriend	2%			
Child- Adult	1%			
Office	4%			

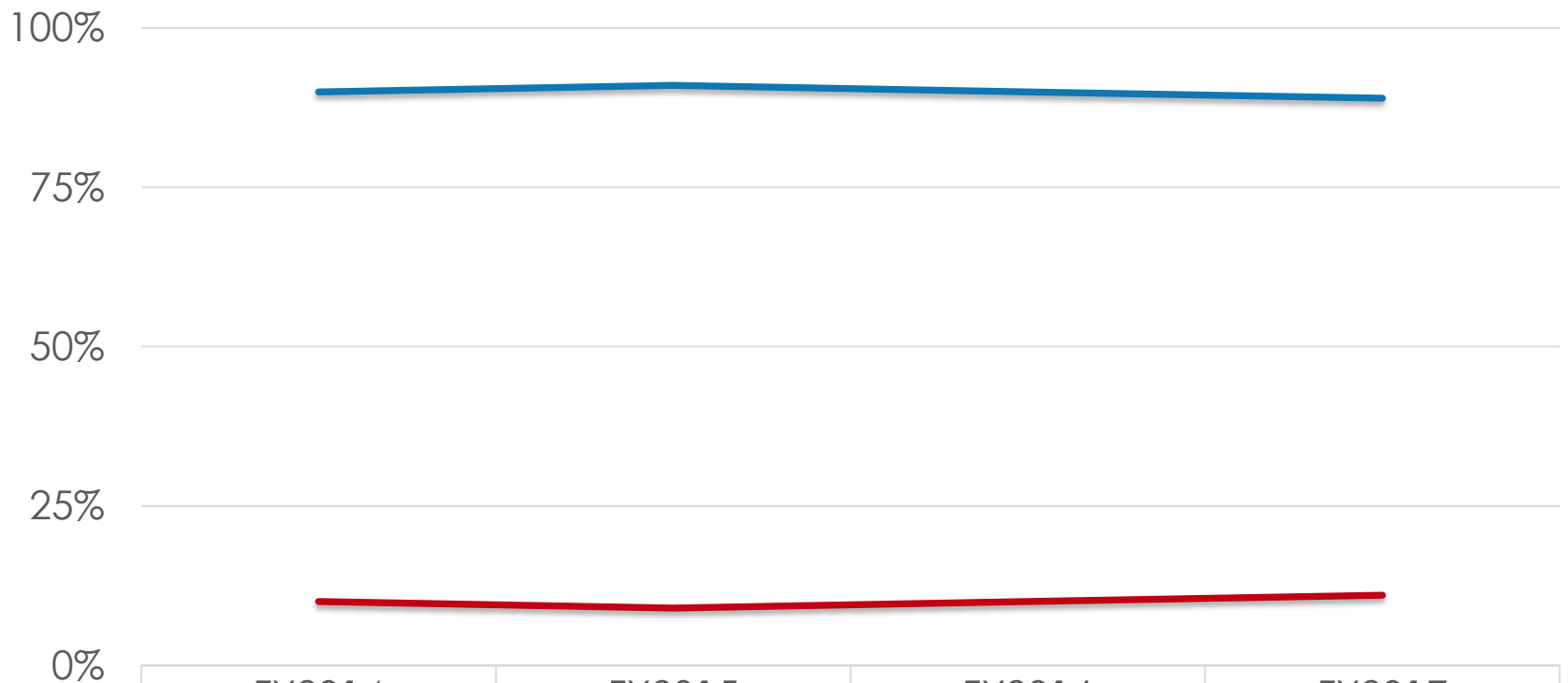
Travel Party - Children



Trips to Guam



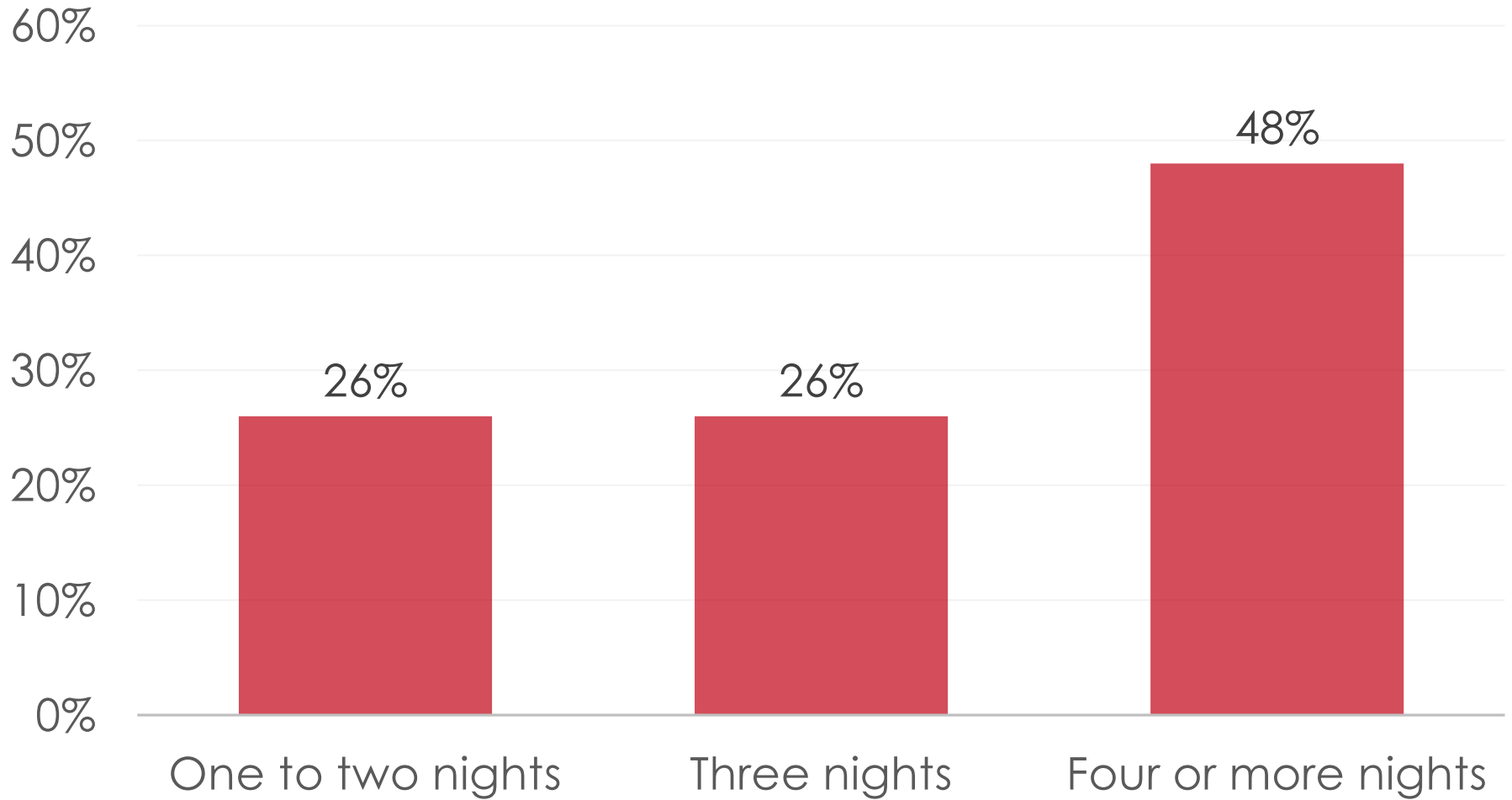
Trips to Guam – Tracking



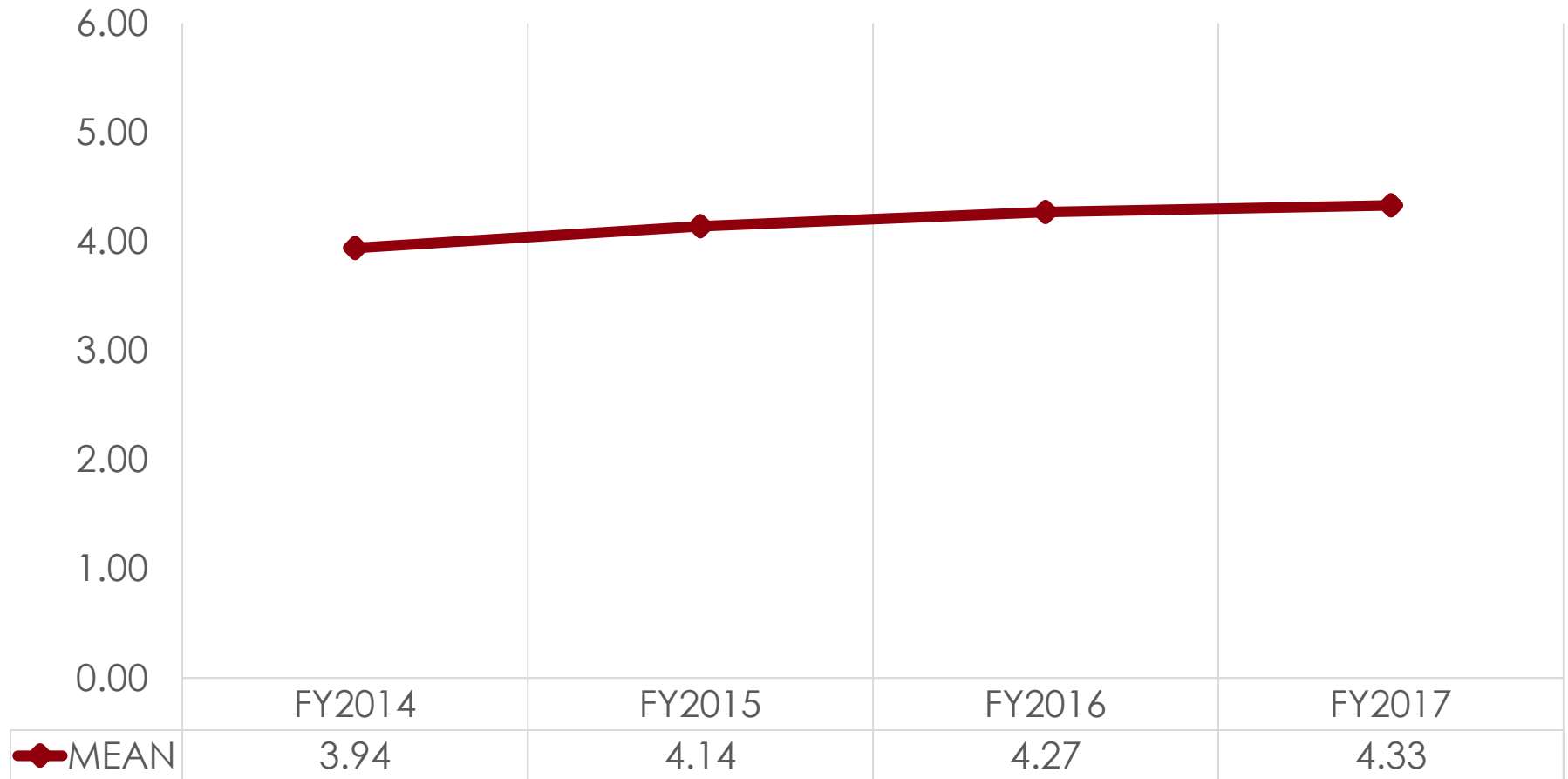
	FY2014	FY2015	FY2016	FY2017
Repeat	90%	91%	90%	89%
1st Time	10%	9%	10%	11%

Length of Stay

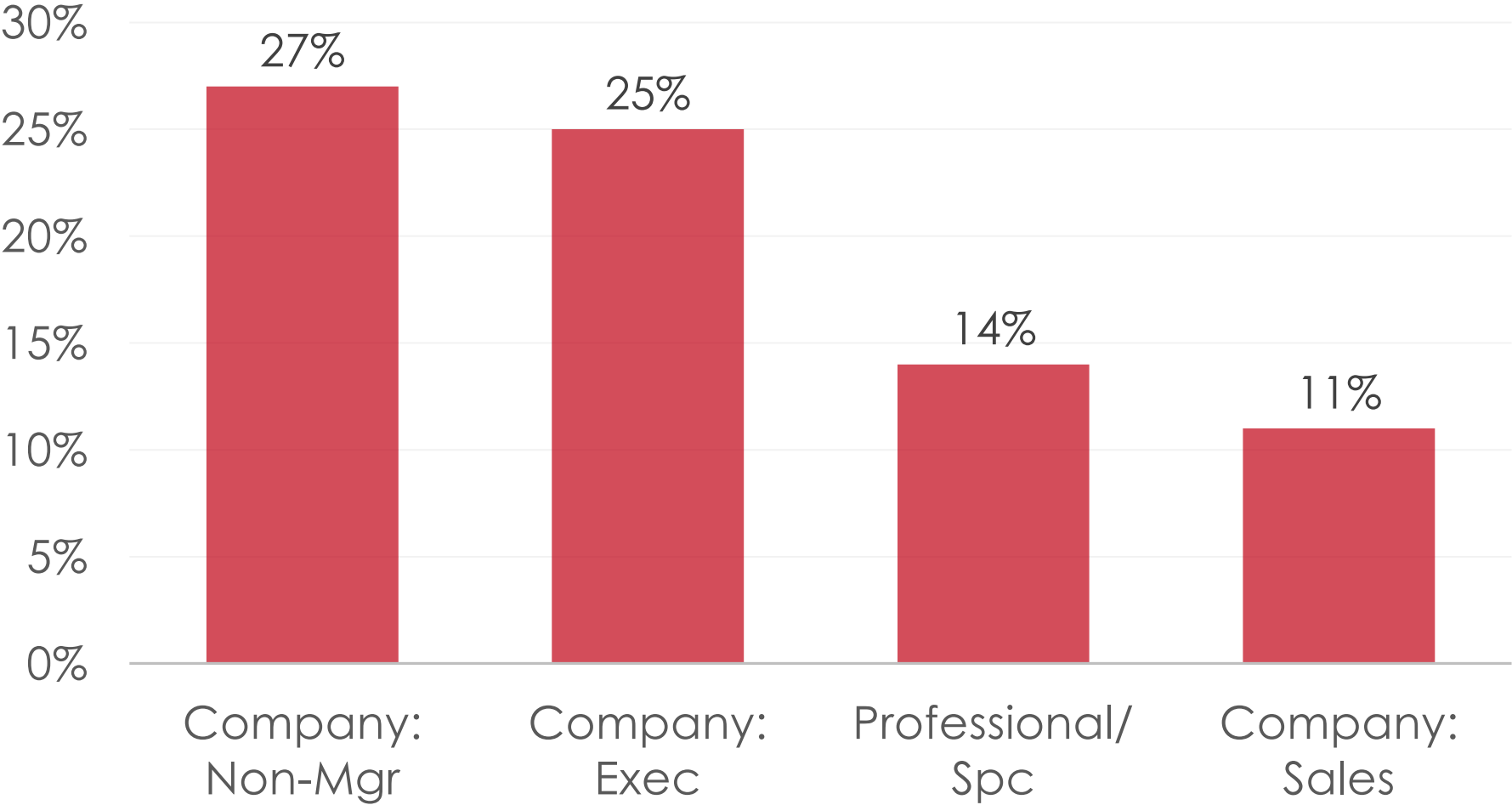
MEAN NUMBER OF NIGHTS = 4.33
MEDIAN NUMBER OF NIGHTS = 3



Length of Stay –Tracking



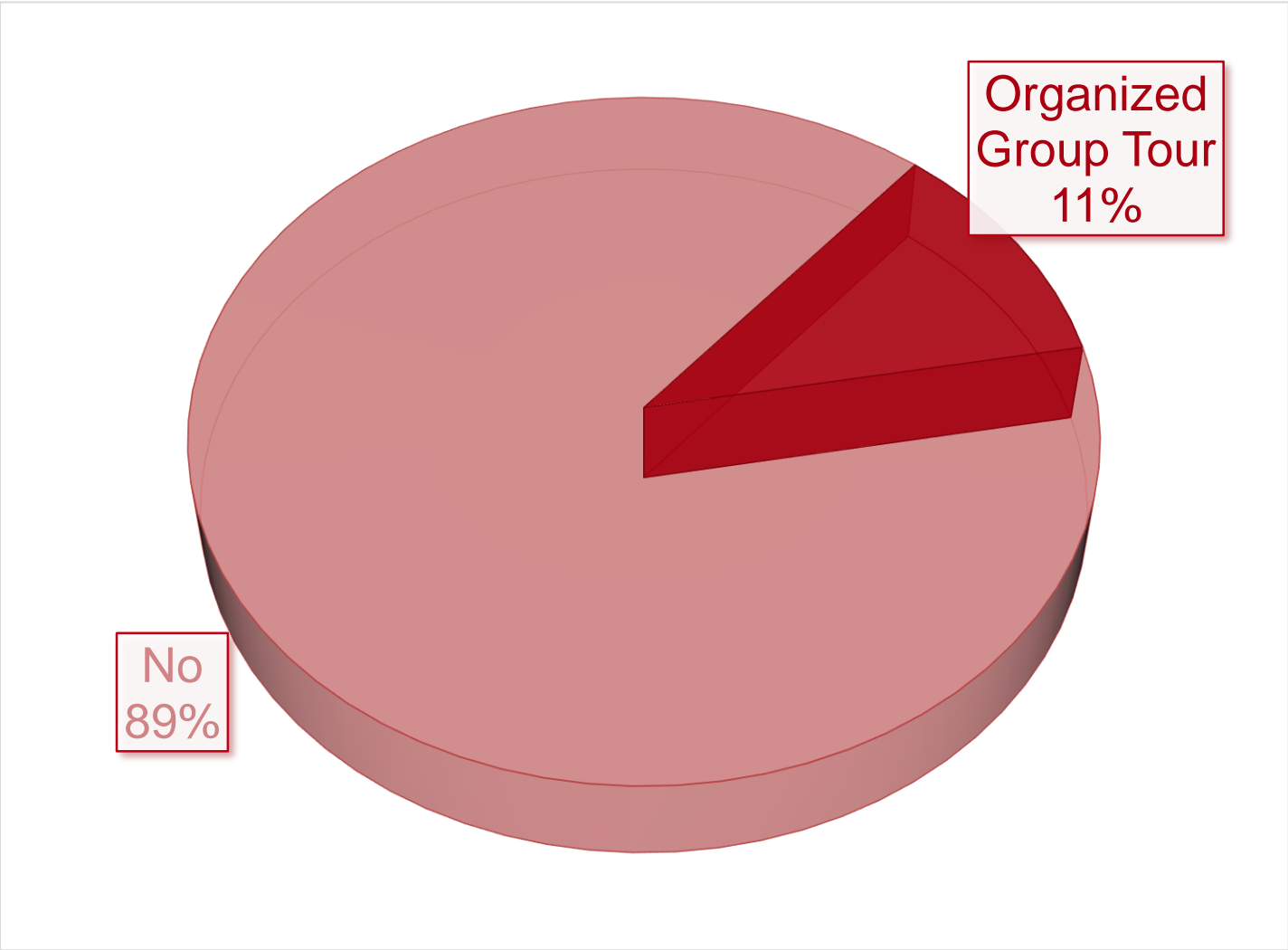
Occupation – Top Responses (10%+)



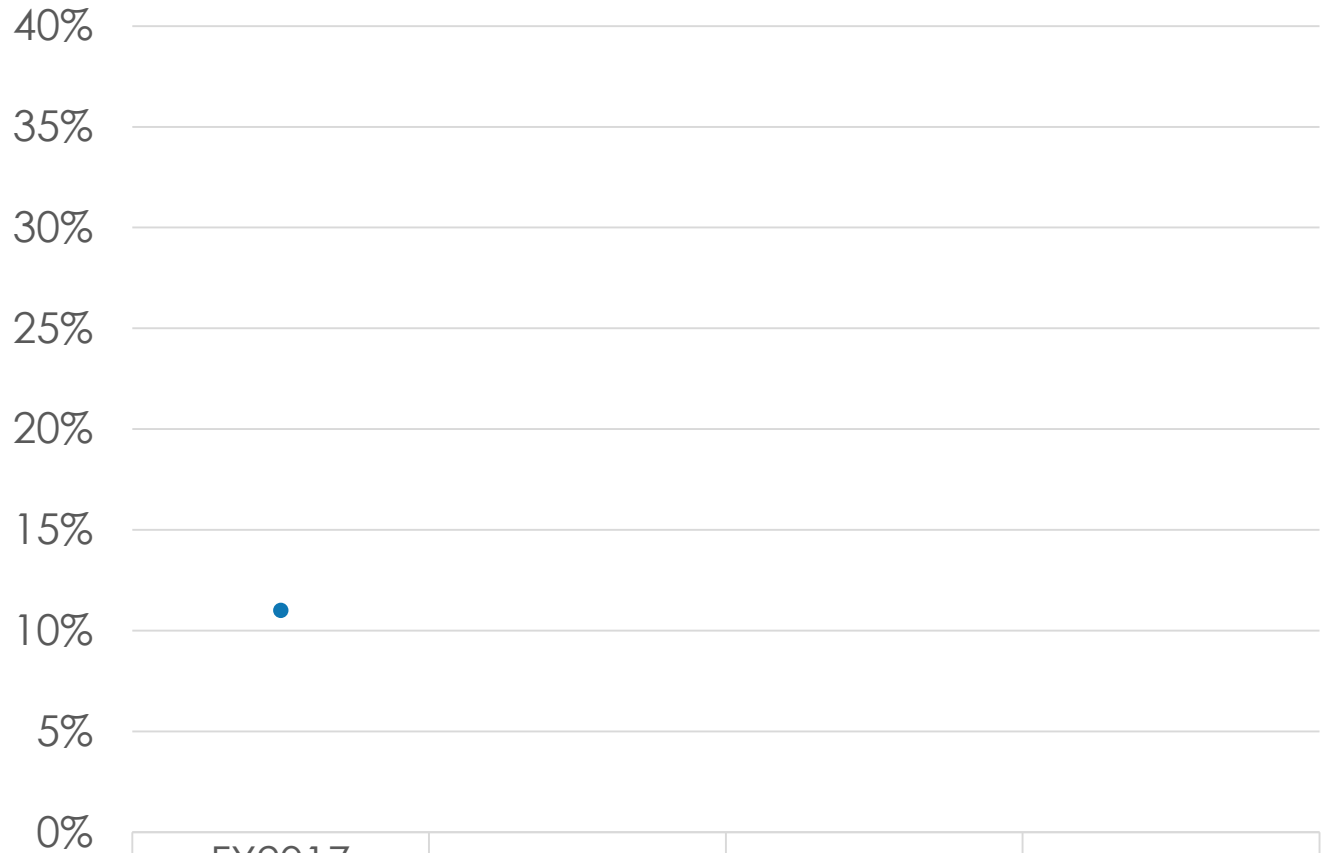
SECTION 2

TRAVEL PLANNING

Organized Group Tour



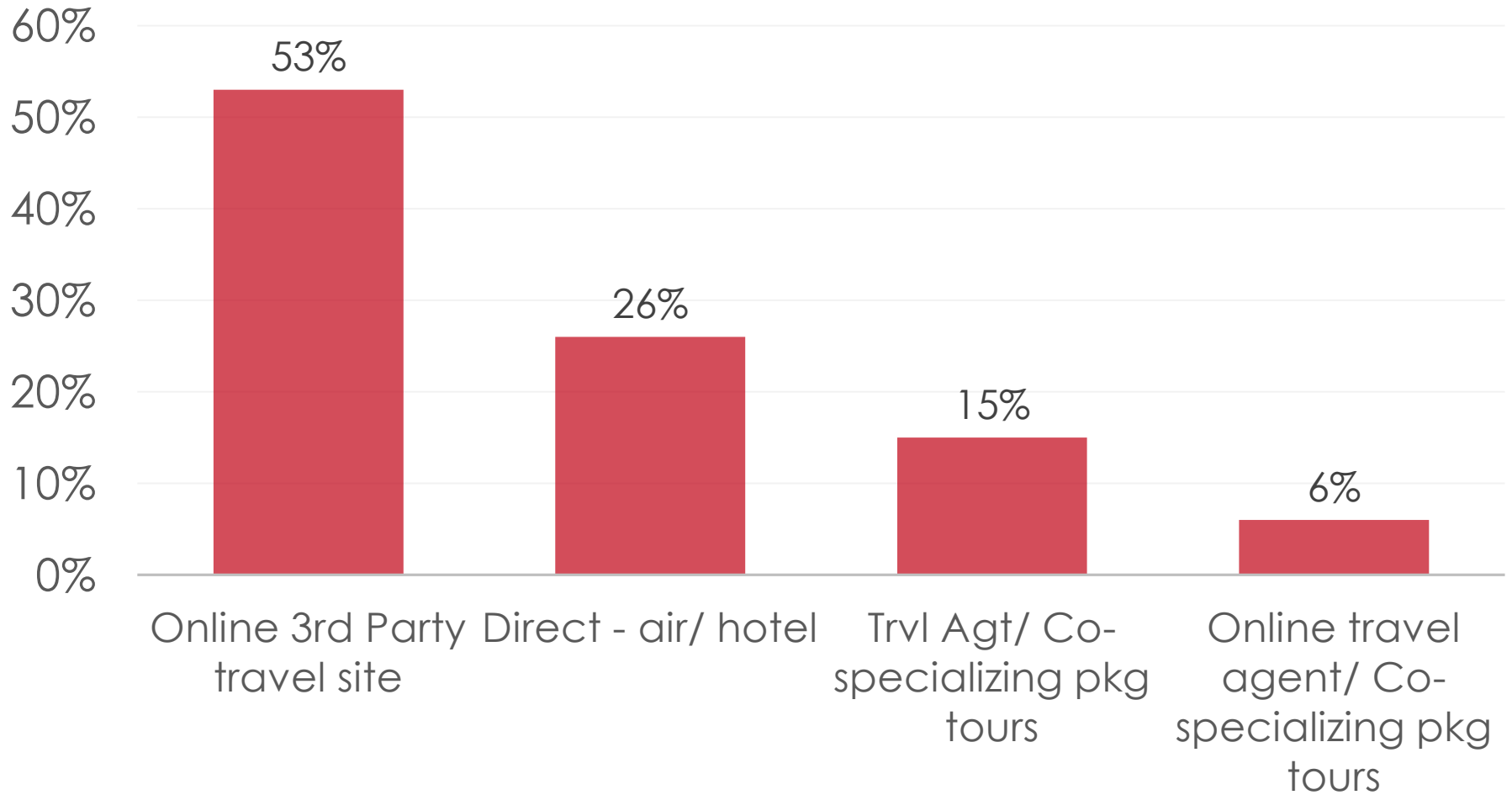
Organized Group Tour



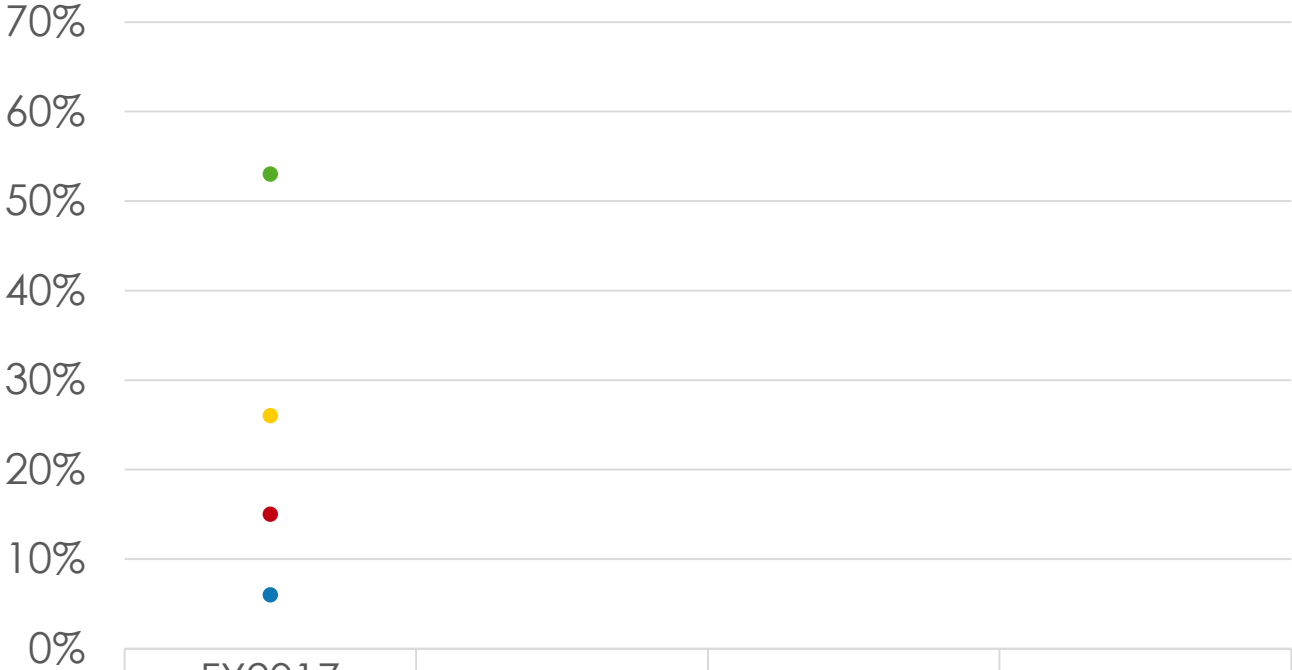
— Organized Group Tour

FY2017			
11%			

Travel Arrangements

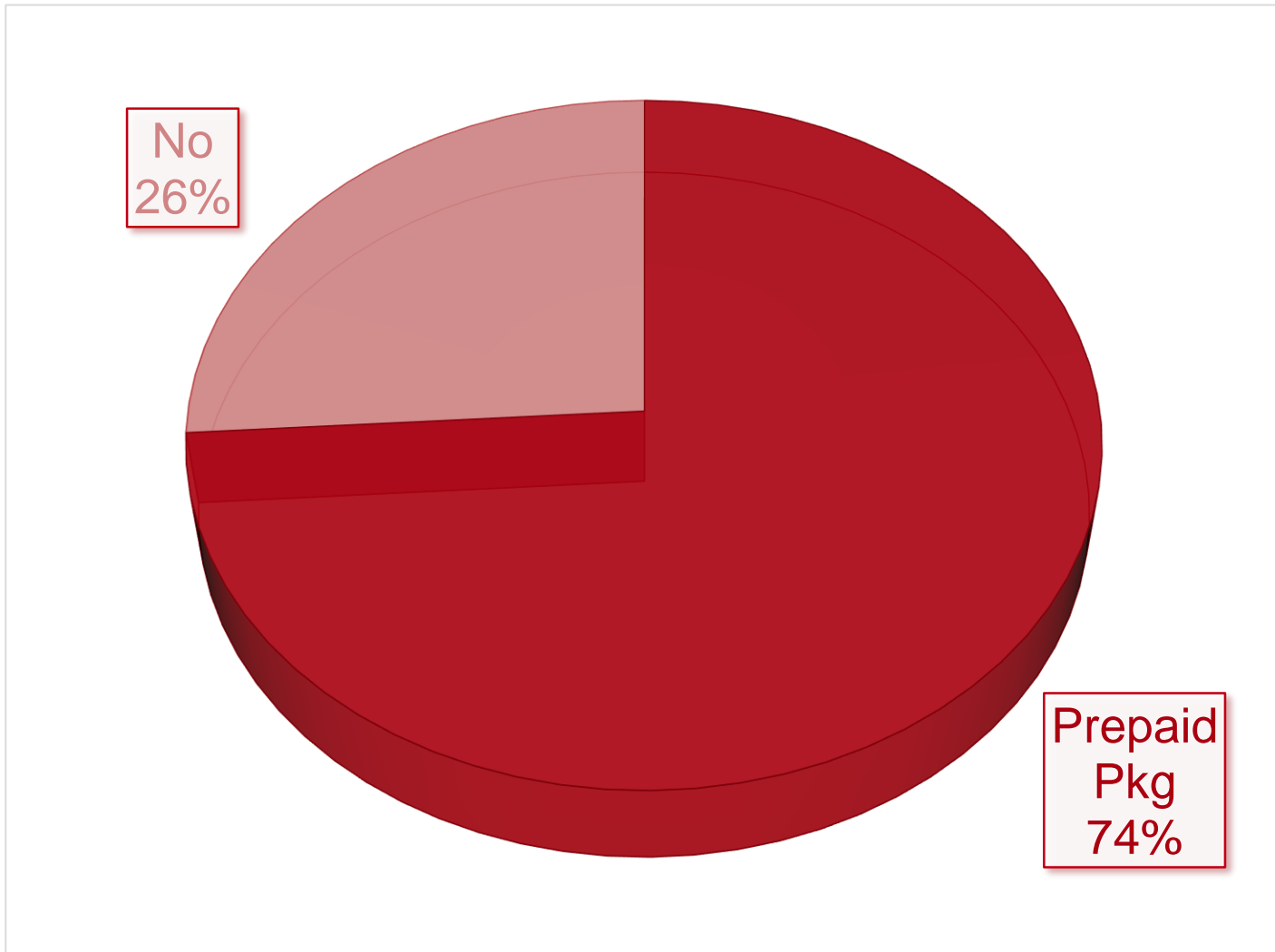


Travel Arrangements

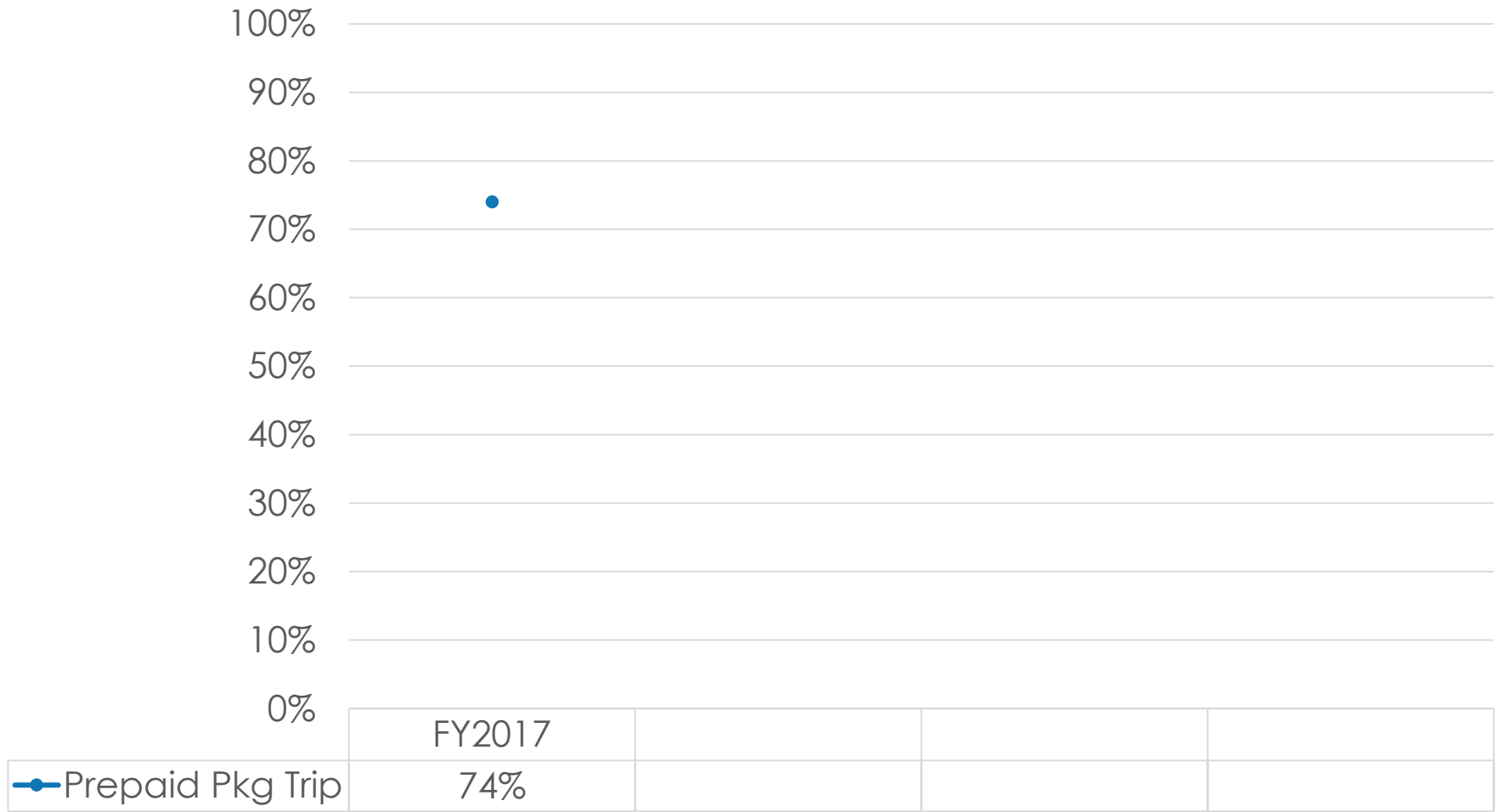


	FY2017			
Online travel agent	6%			
Trvl Agt/ Co- Pkg Tour	15%			
Online 3rd Party	53%			
Direct Air/ Hotel	26%			

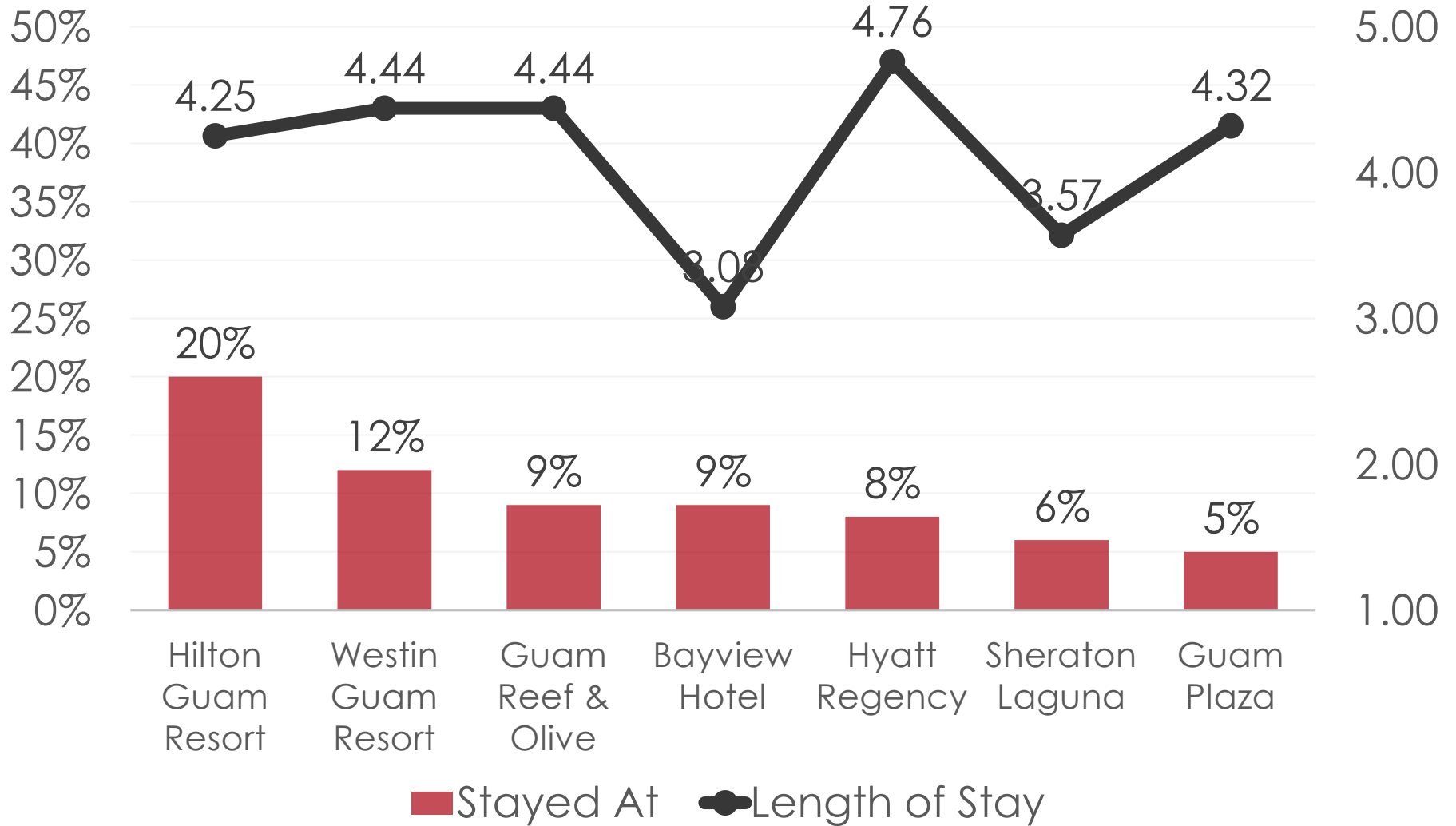
Prepaid Package Trip



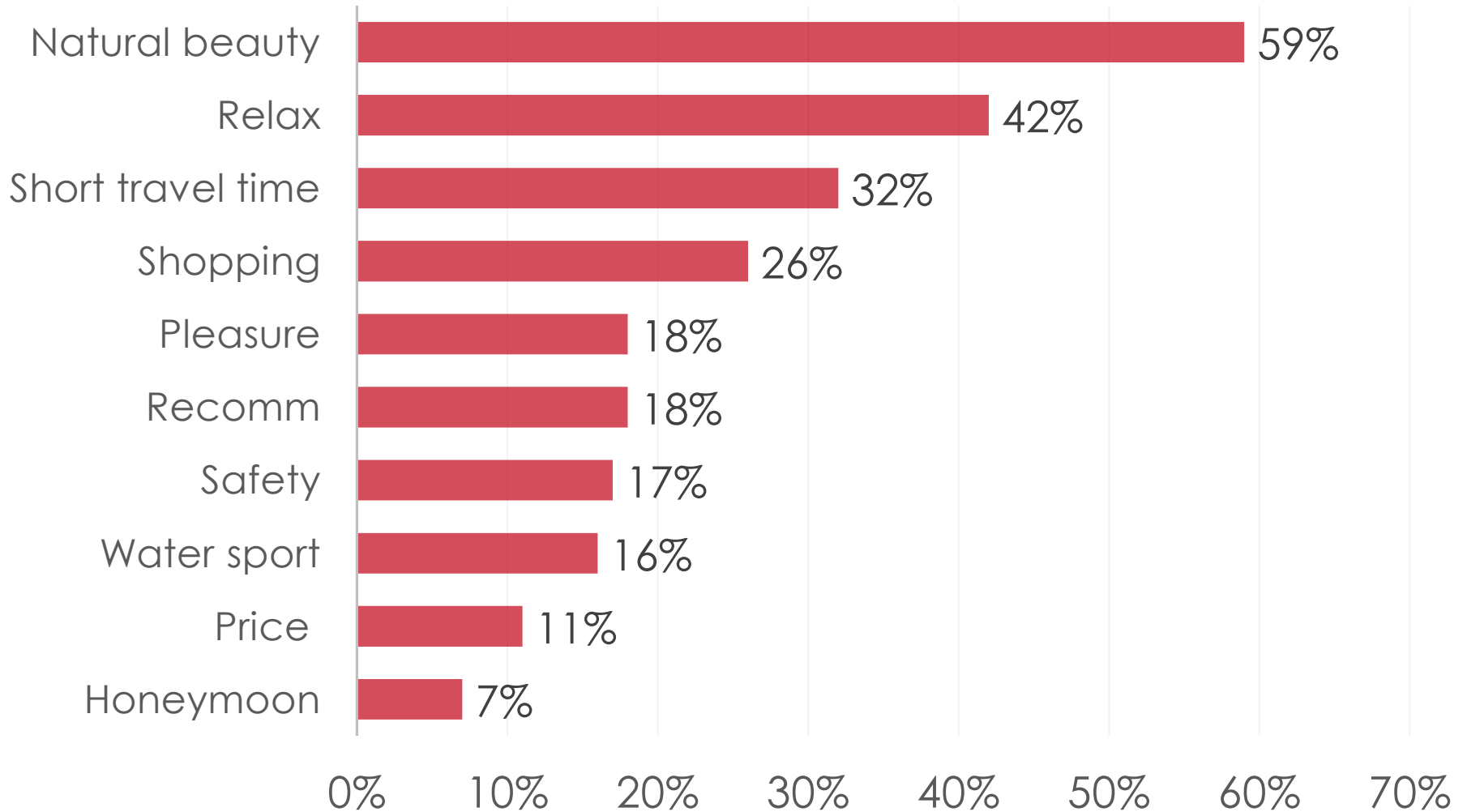
Prepaid Package Trip



Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Top 3

FY2014	FY2015	FY2016	FY2017
31% Natural beauty 14% Relax 13% Recommendations	41% Natural Beauty 11% Short travel time 11% Relax	40% Natural beauty 12% Short travel time 8% Relax	59% Natural beauty 42% Relax 32% Short travel time

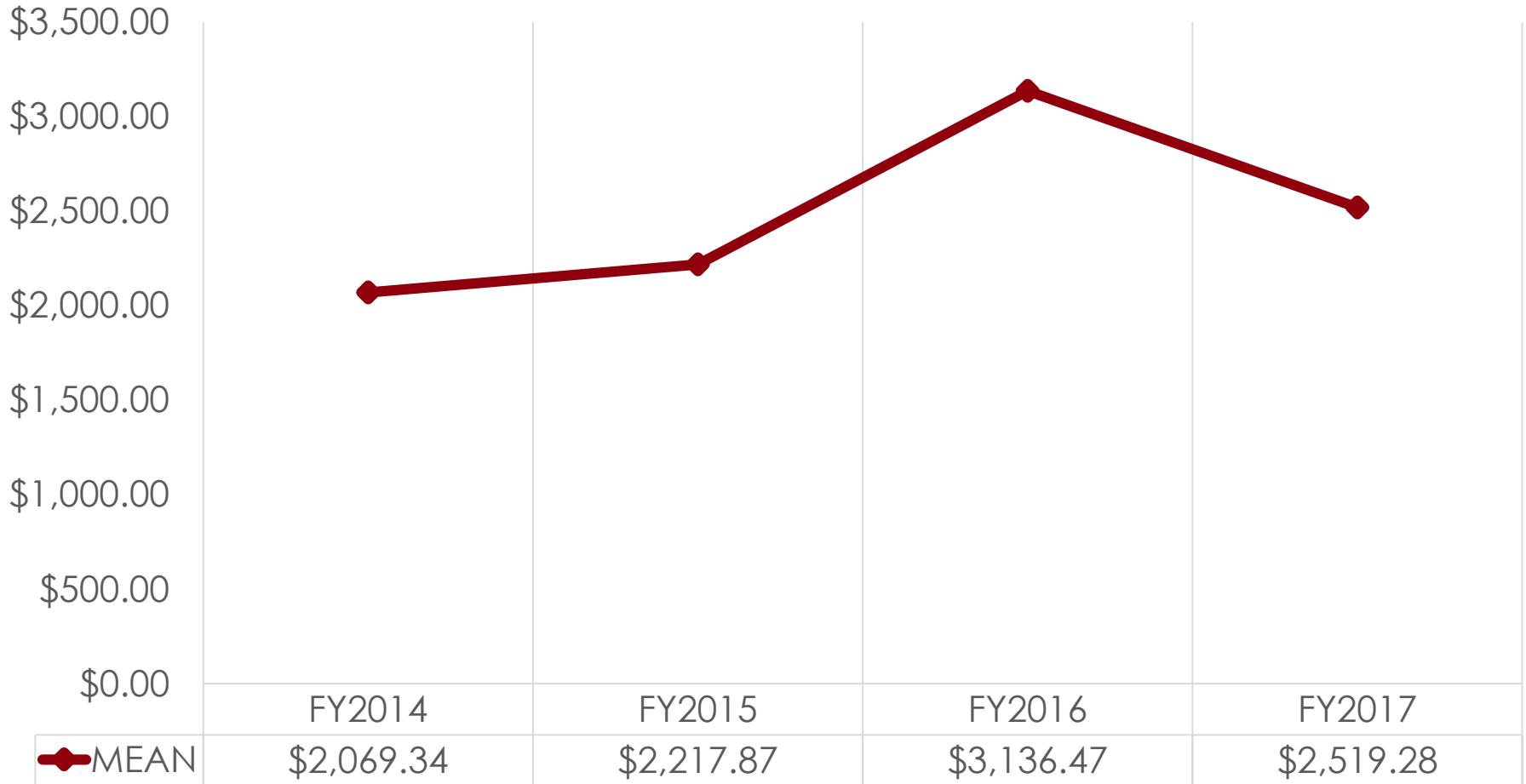
SECTION 3

EXPENDITURES

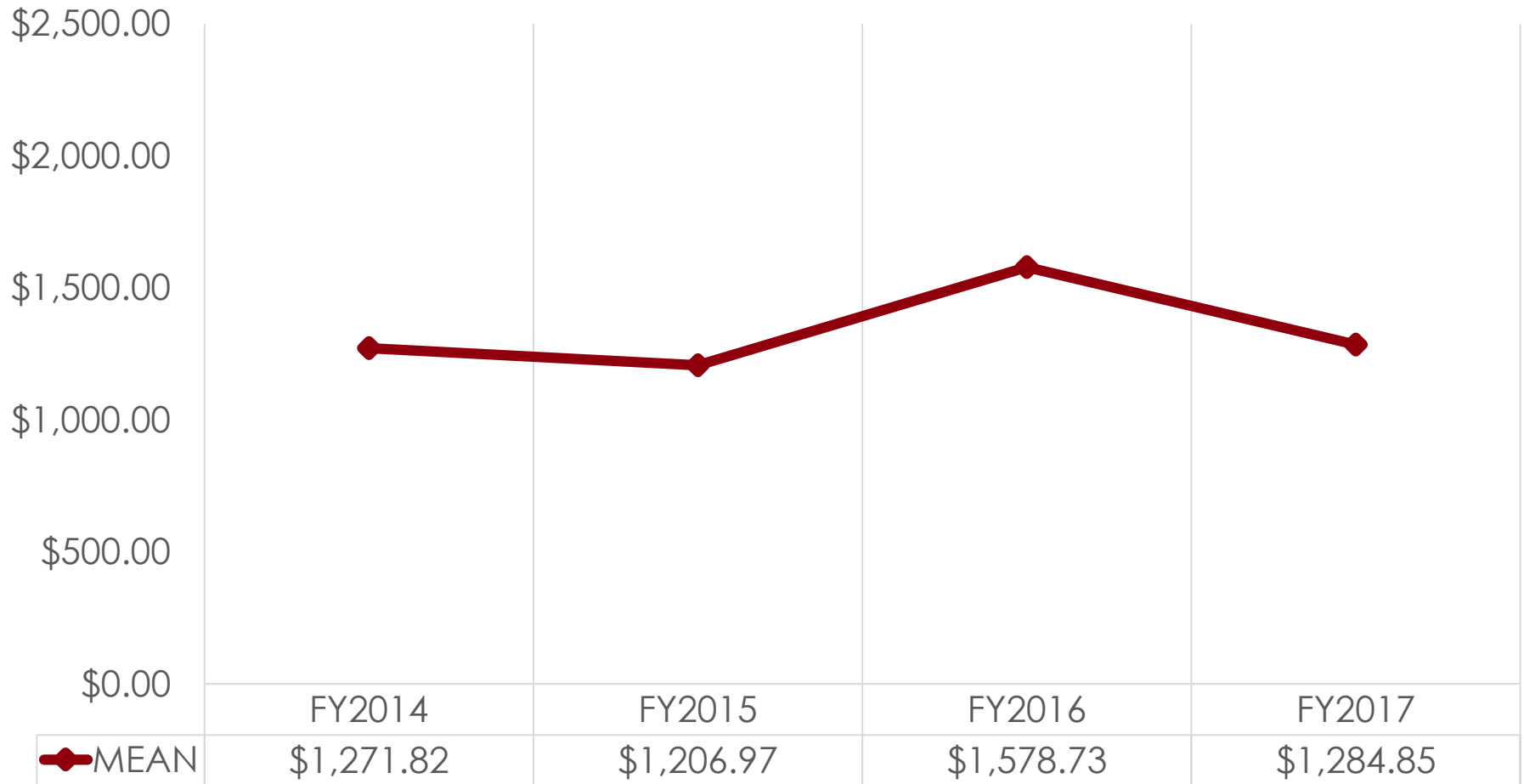
Prepaid Expenditures

- \$2,519.28 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$1,284.85 = overall mean average per person prepaid expenditures

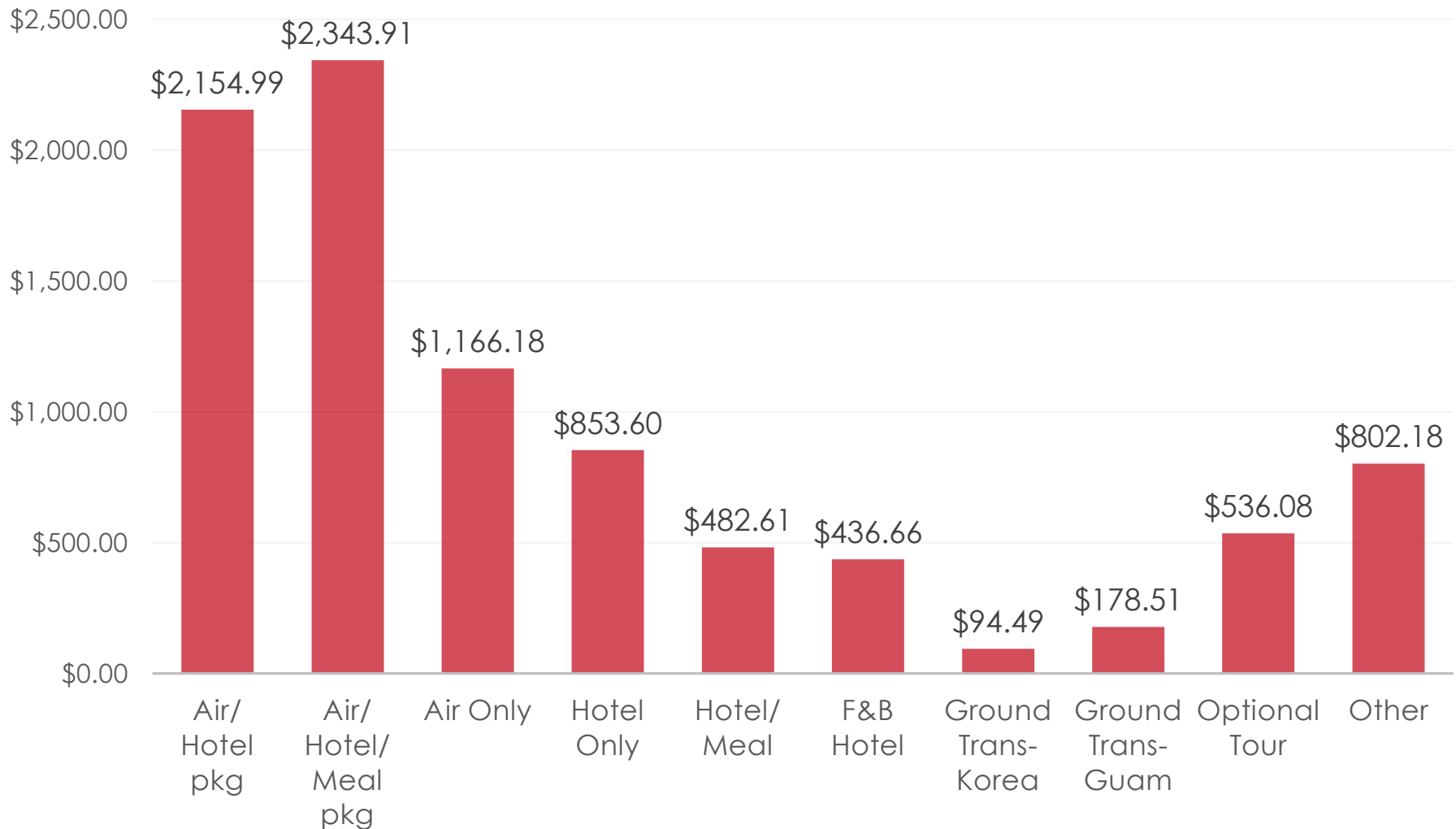
Prepaid Entire Travel Party – Tracking



Prepaid Per Person – Tracking

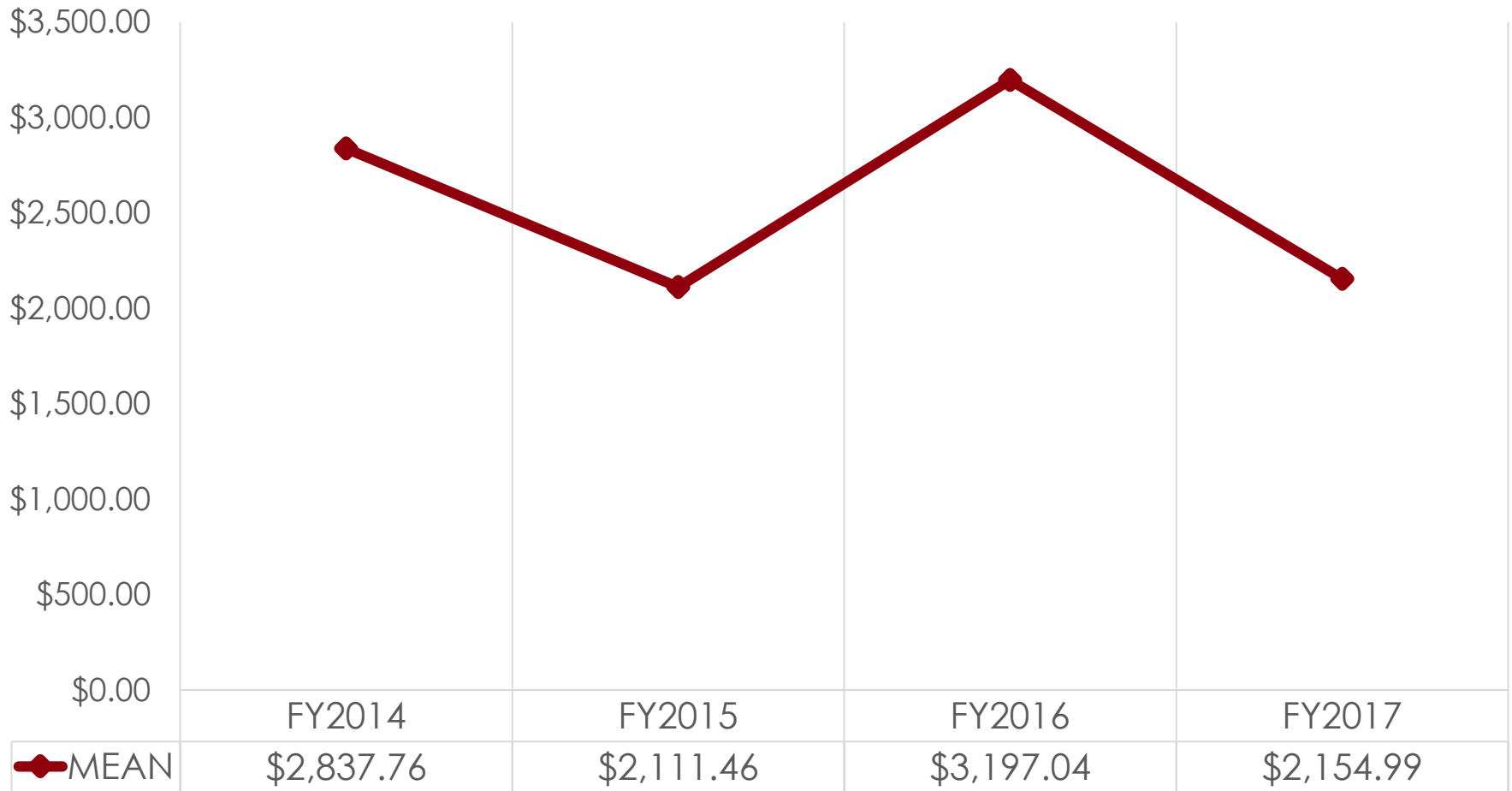


Prepaid Expenses by Category – Mean Entire Travel Party



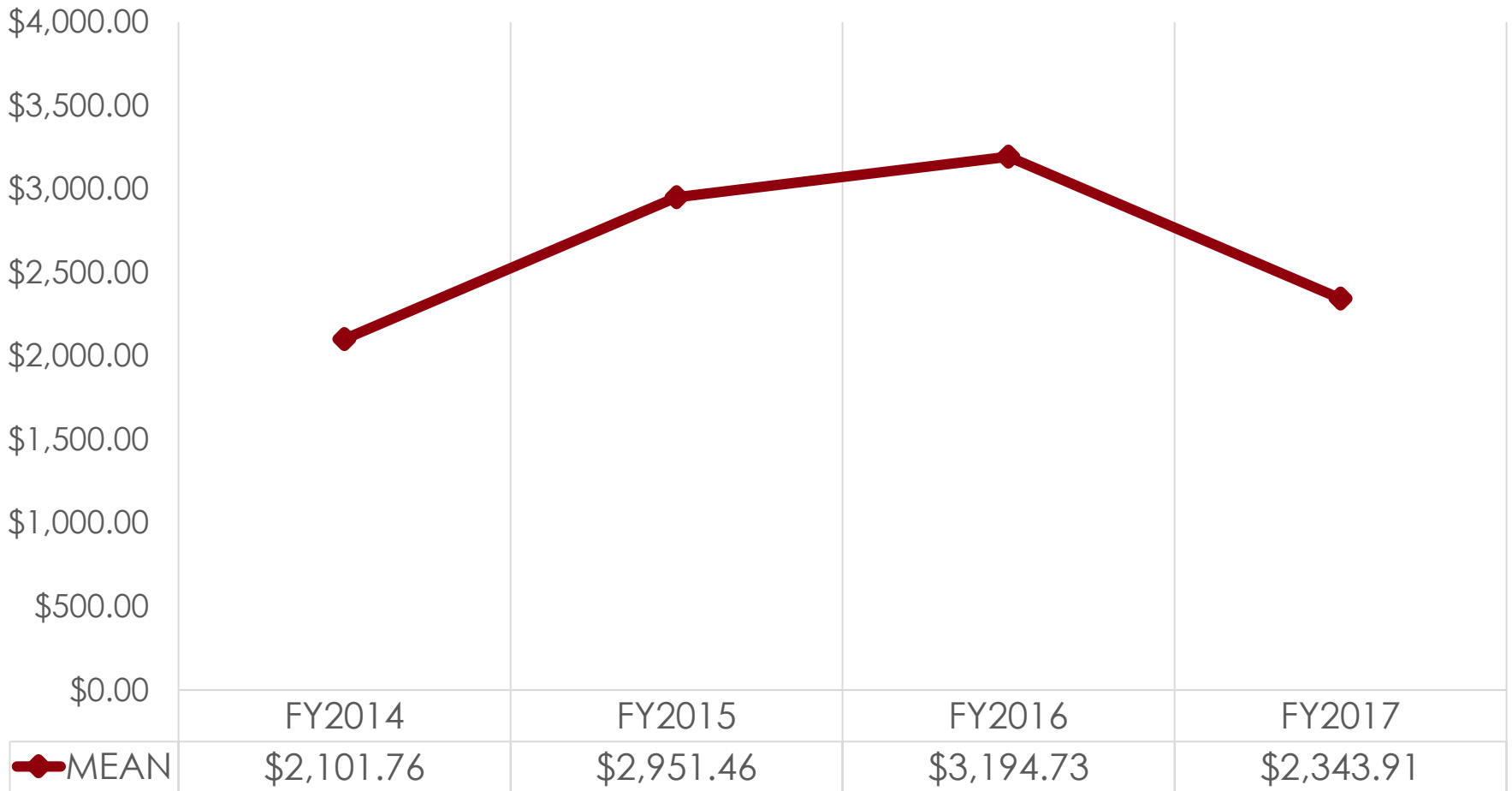
Prepaid – Tracking

Airfare & Accommodation Packages

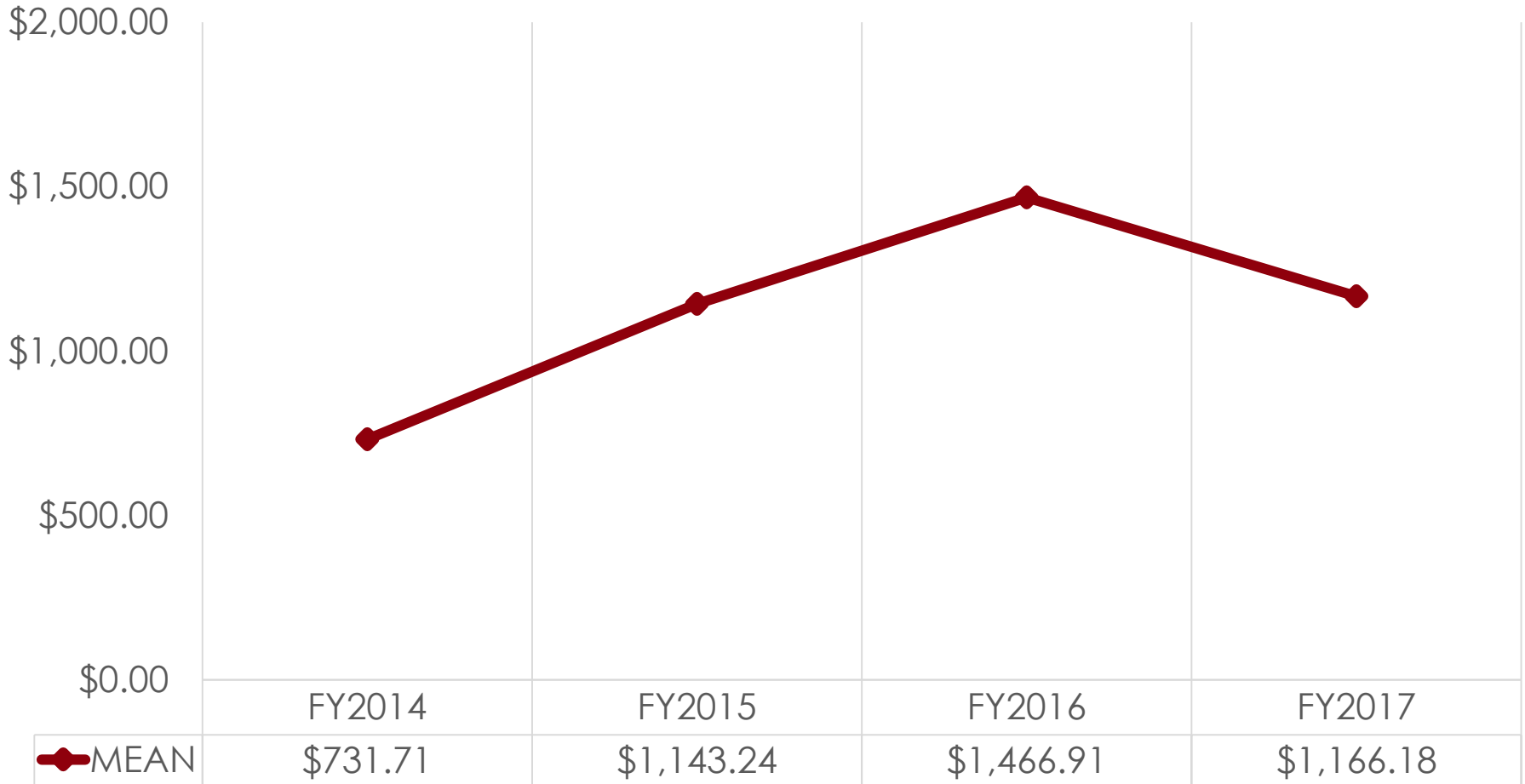


Prepaid – Tracking

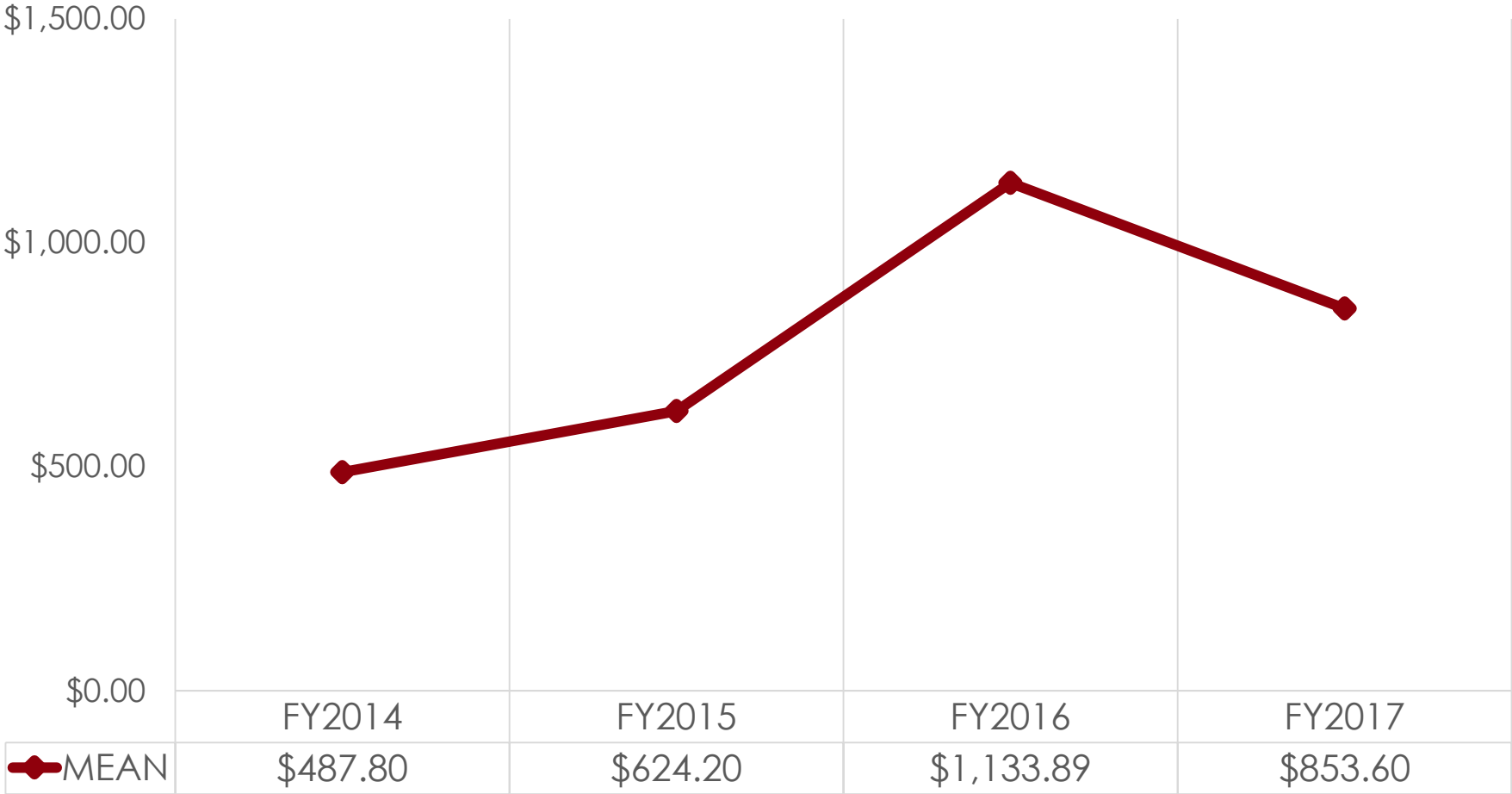
Airfare & Accommodation W/ Meal Packages



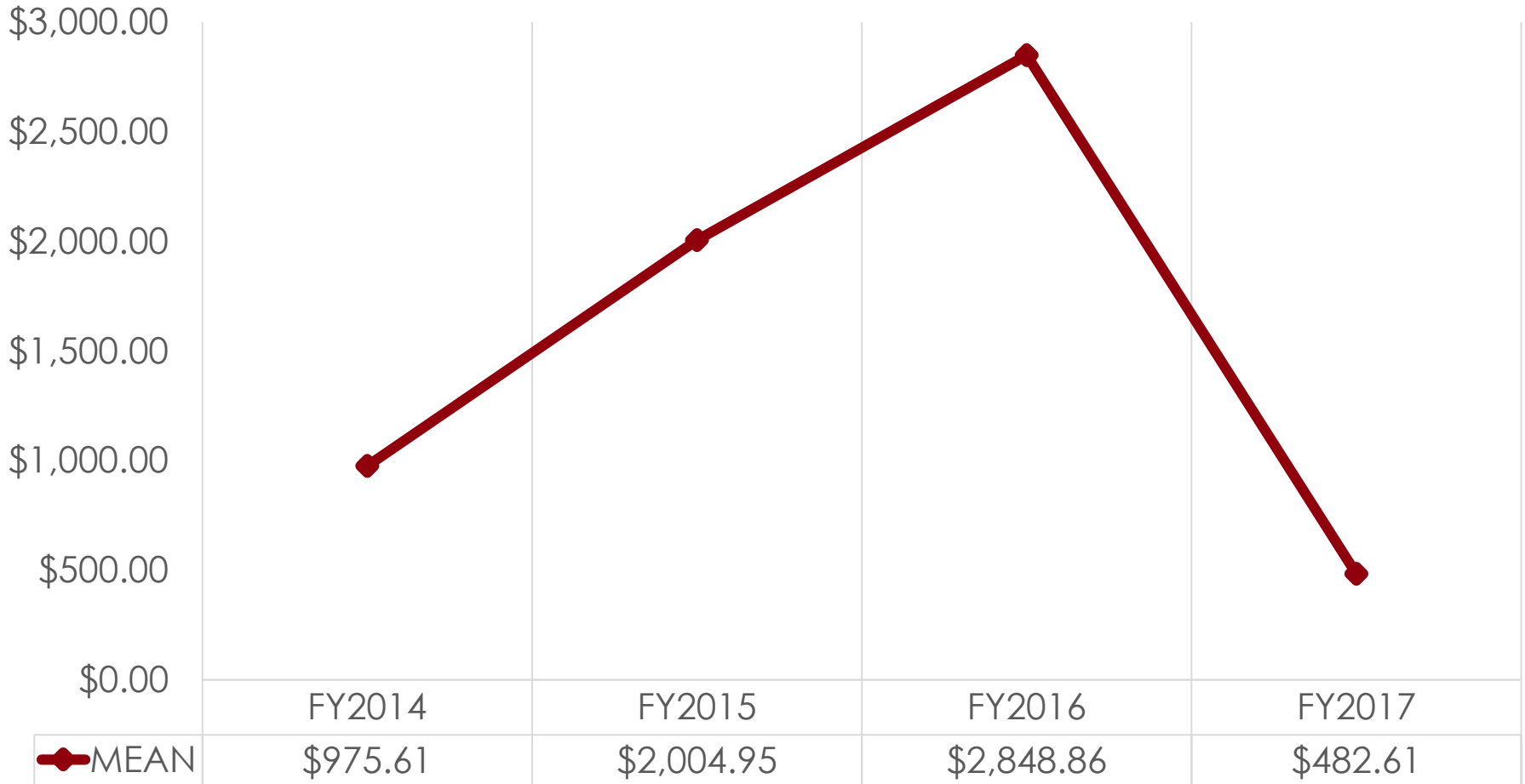
Prepaid – Tracking Airfare Only



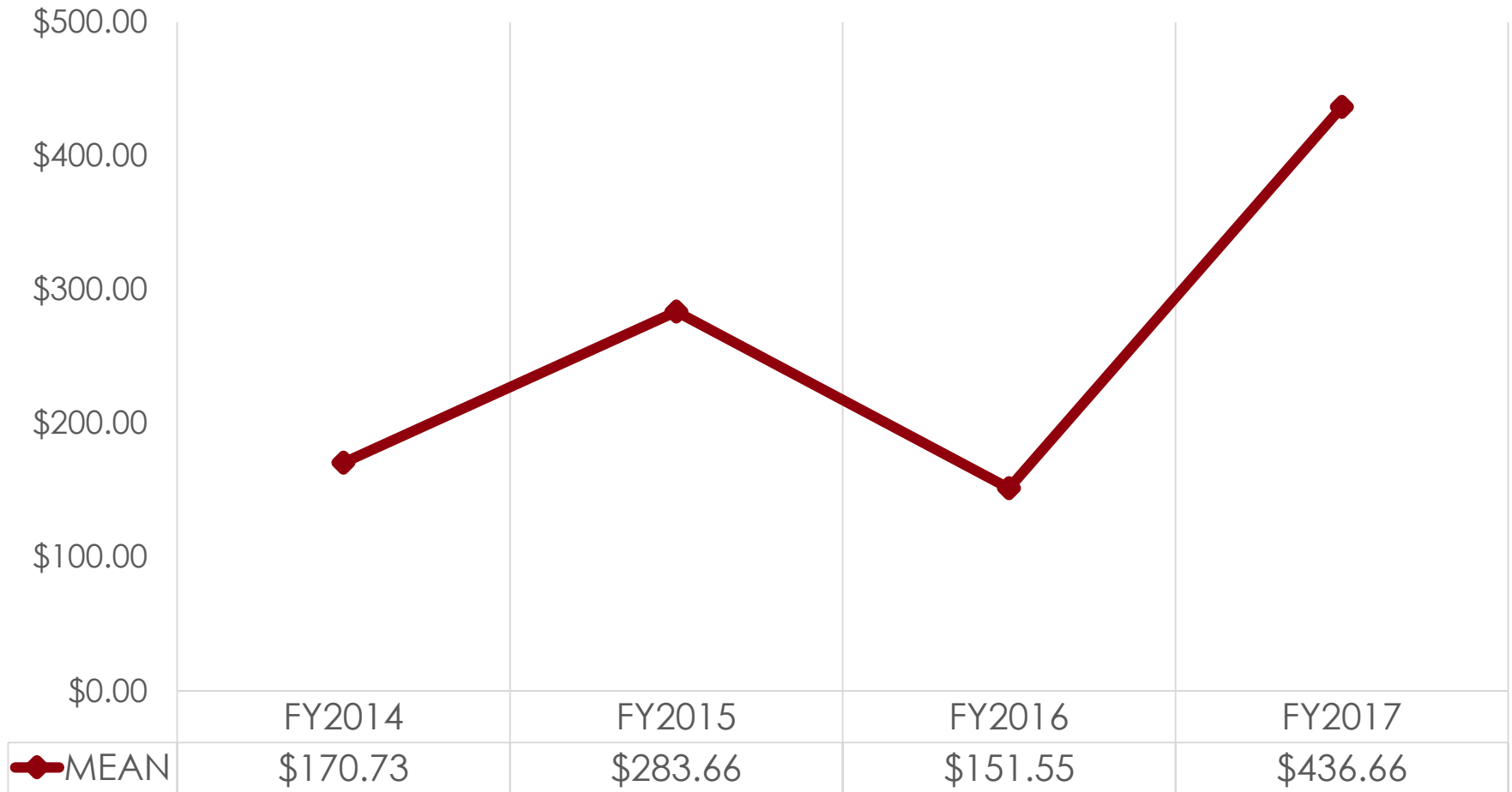
Prepaid – Tracking Accommodations Only



Prepaid – Tracking Accommodations w/ Meal Only

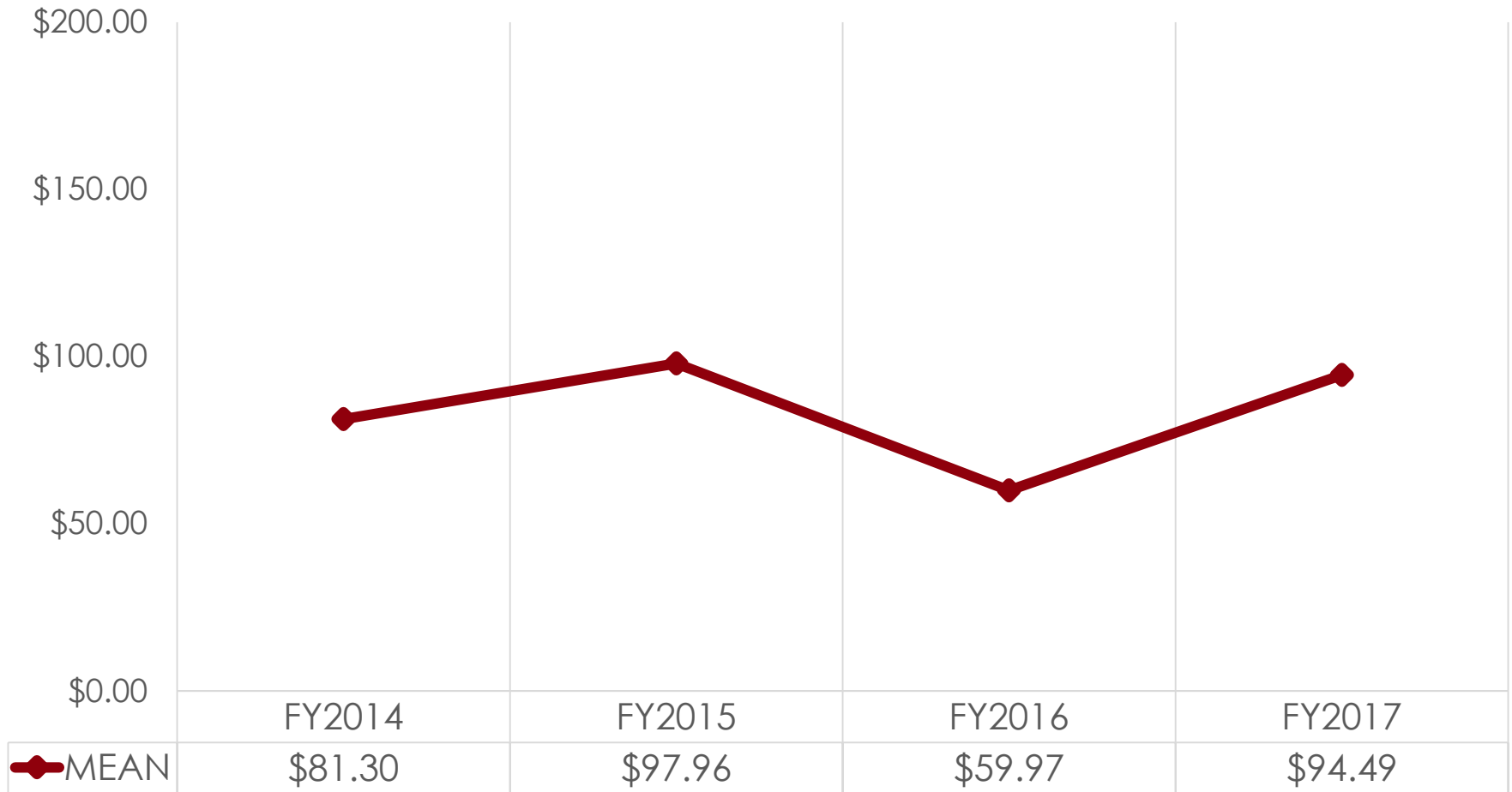


Prepaid – Tracking Food & Beverage in Hotel



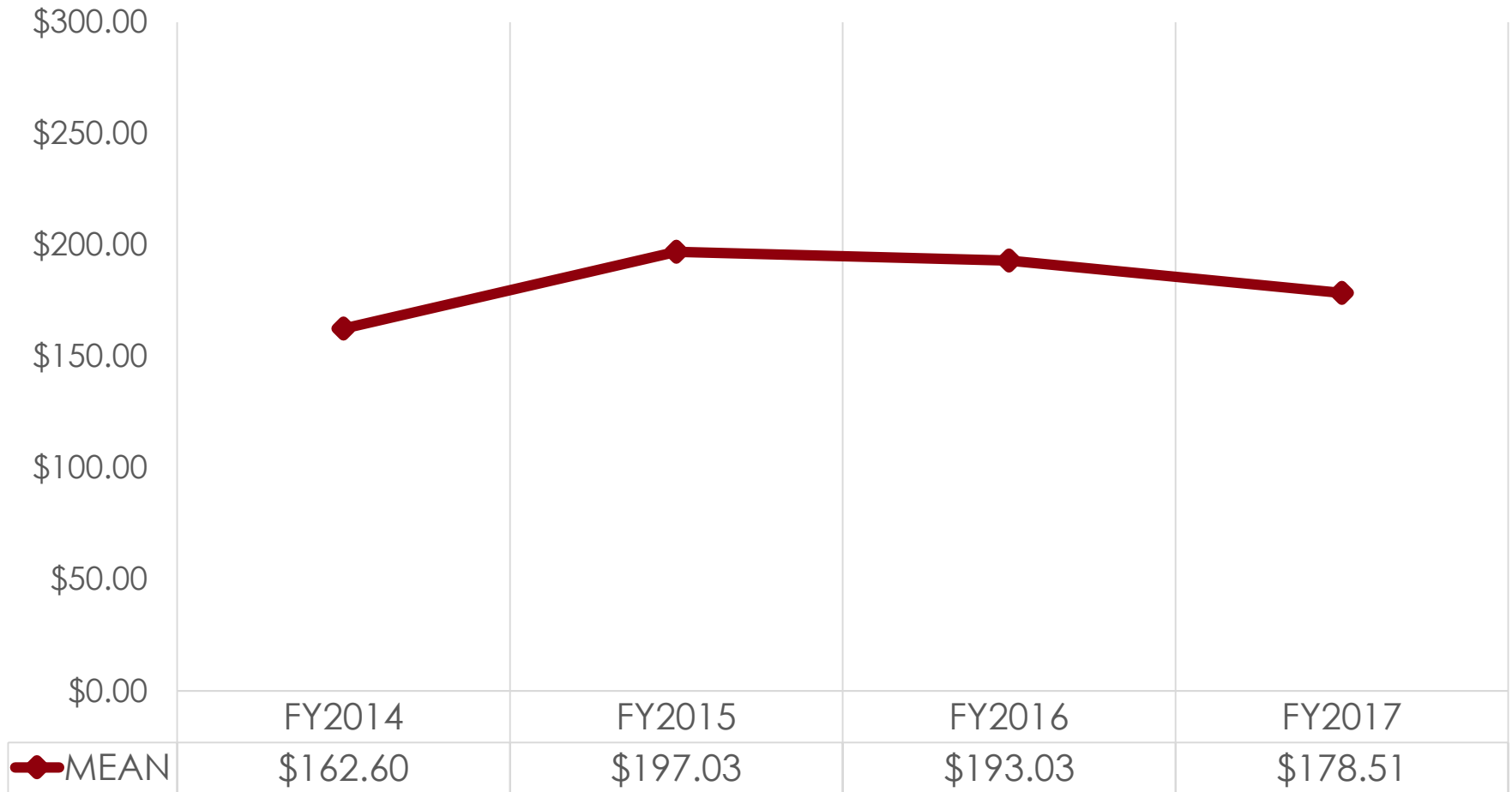
Prepaid – Tracking

Ground Transportation - China

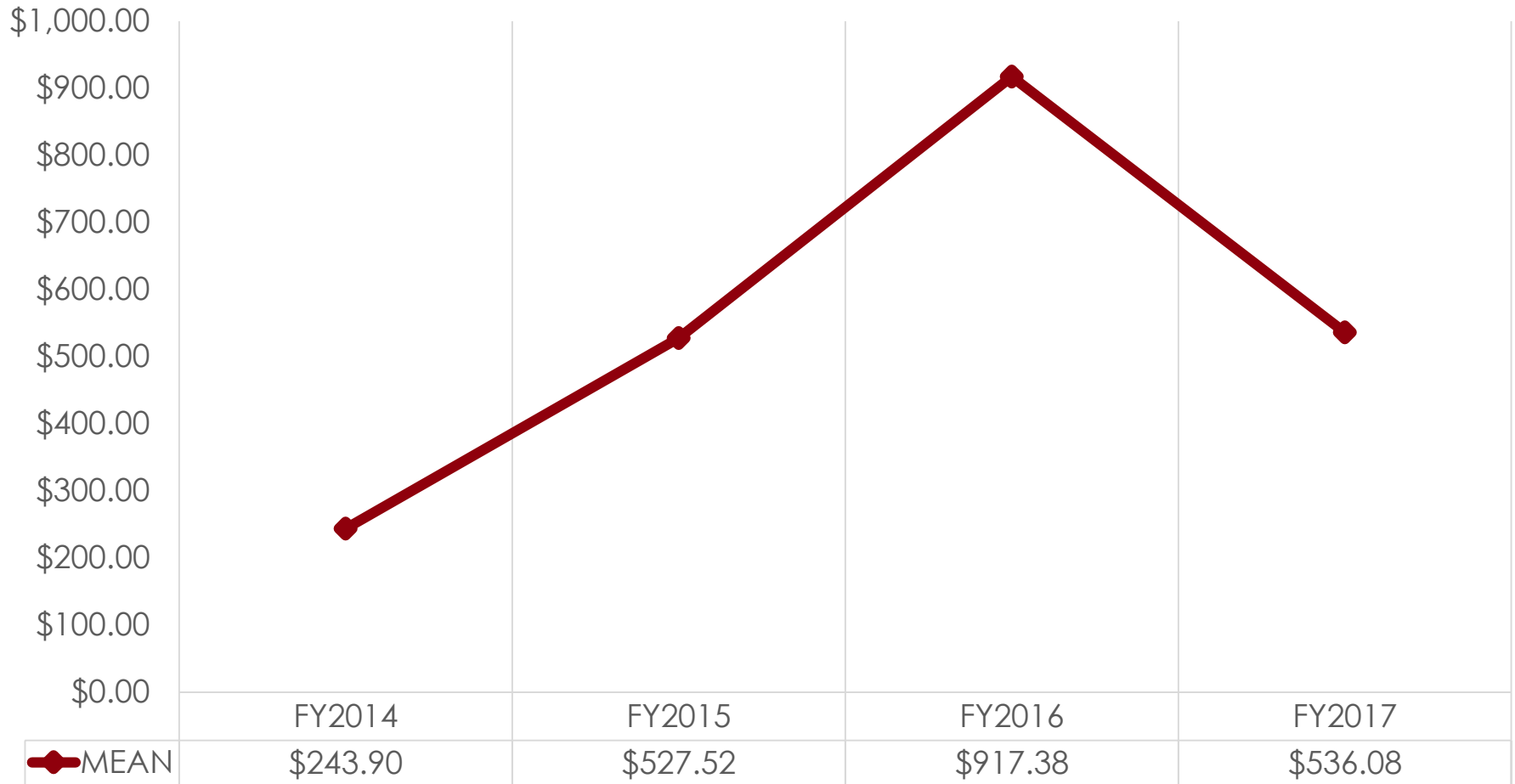


Prepaid – Tracking

Ground Transportation - Guam



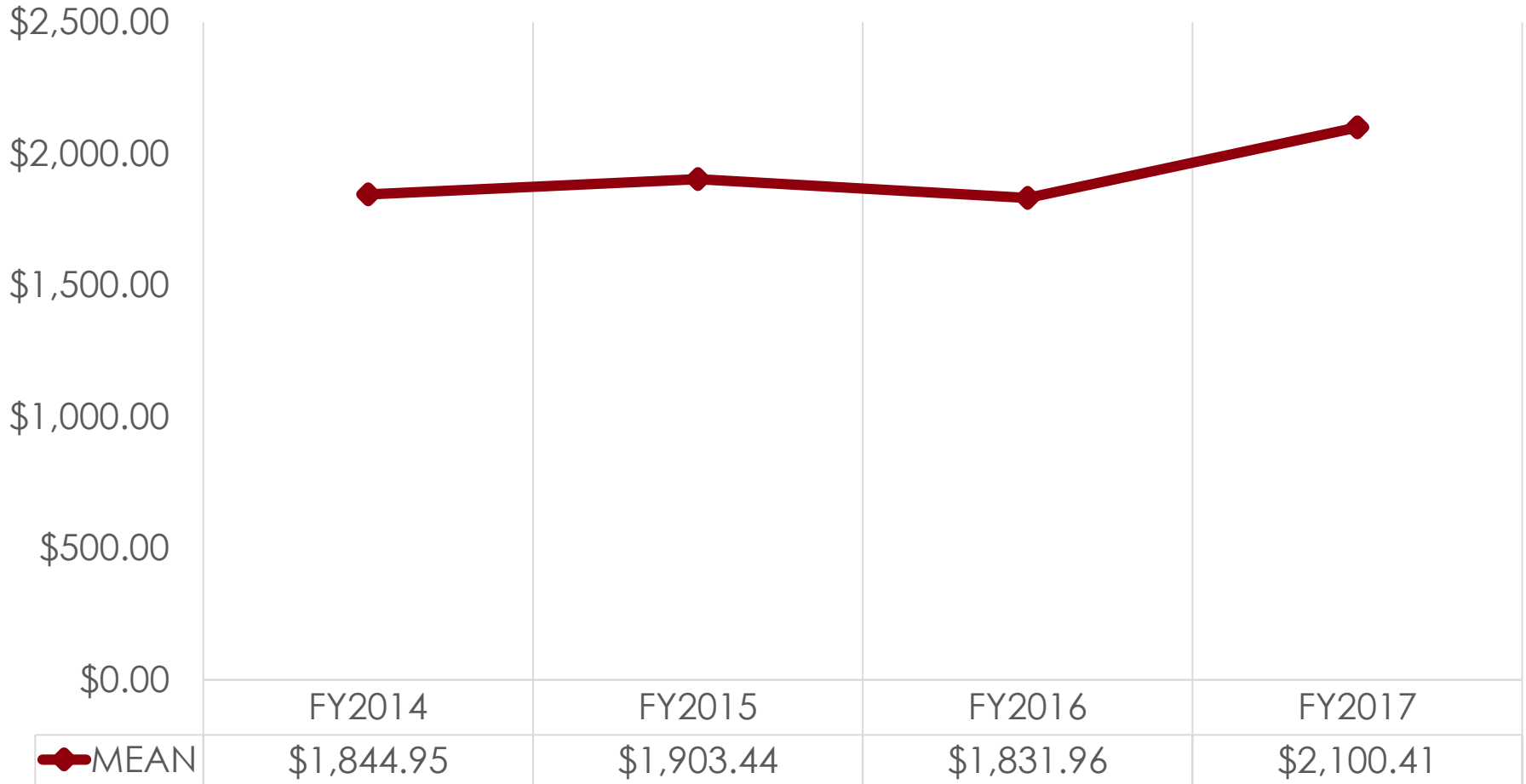
Prepaid – Tracking Optional tours/ Activities



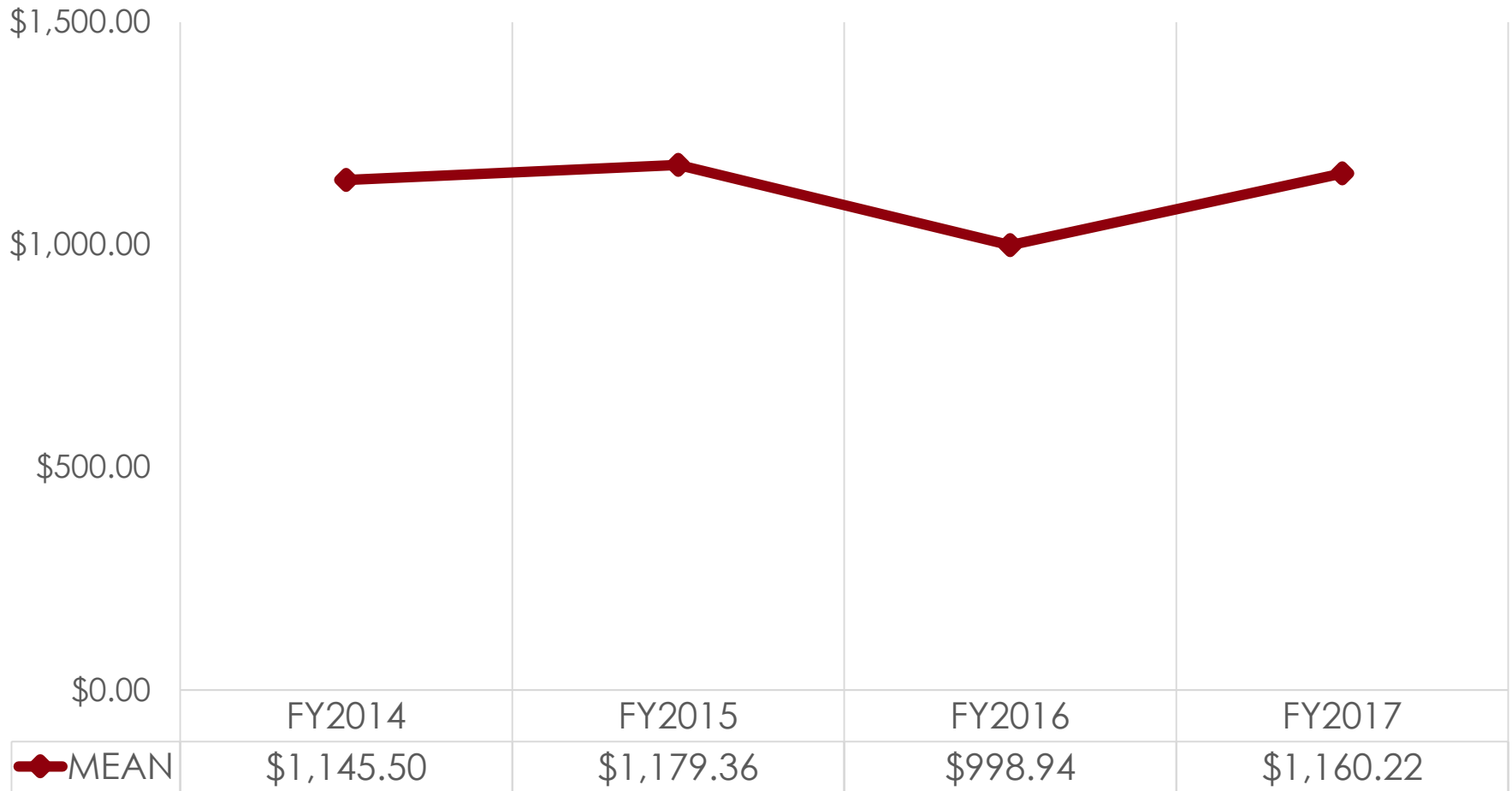
On-Island Expenditures

- \$2,100.41 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$1,160.22 = overall mean average per person prepaid expenditures

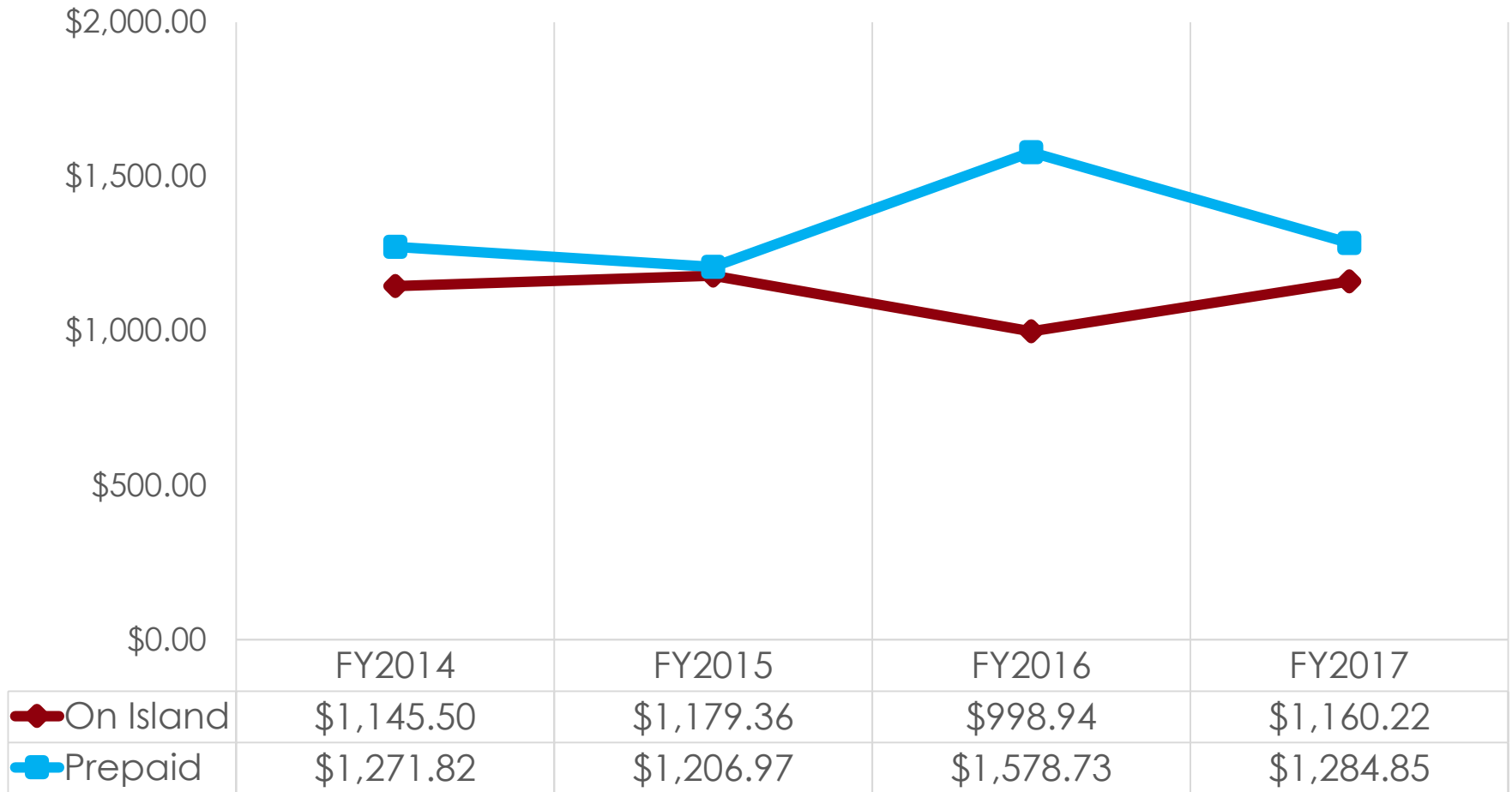
On-Island Entire Travel Party – Tracking



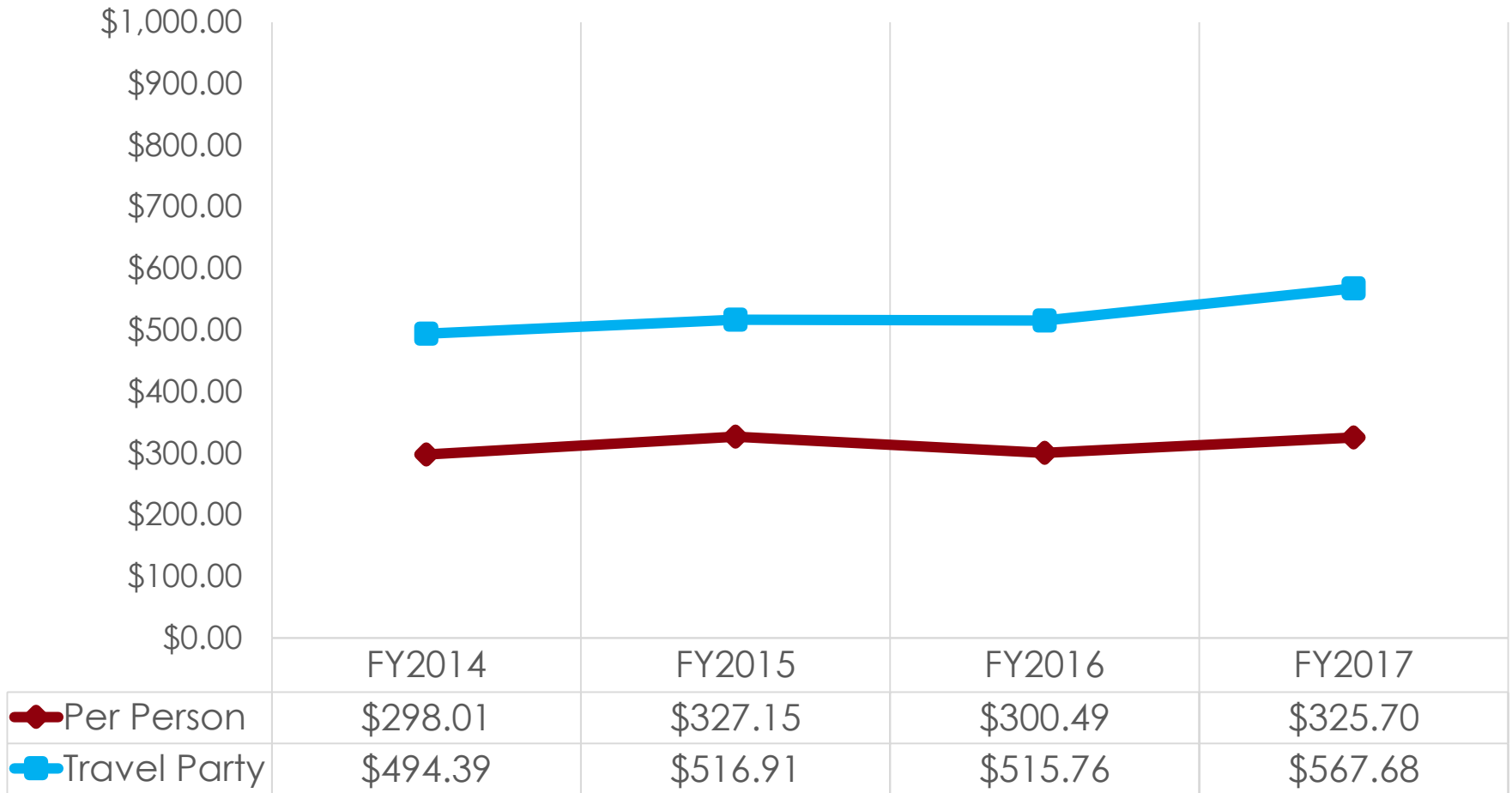
On-Island Per Person – Tracking



Per Person MEAN expenditures – Tracking On-Island/ Prepaid



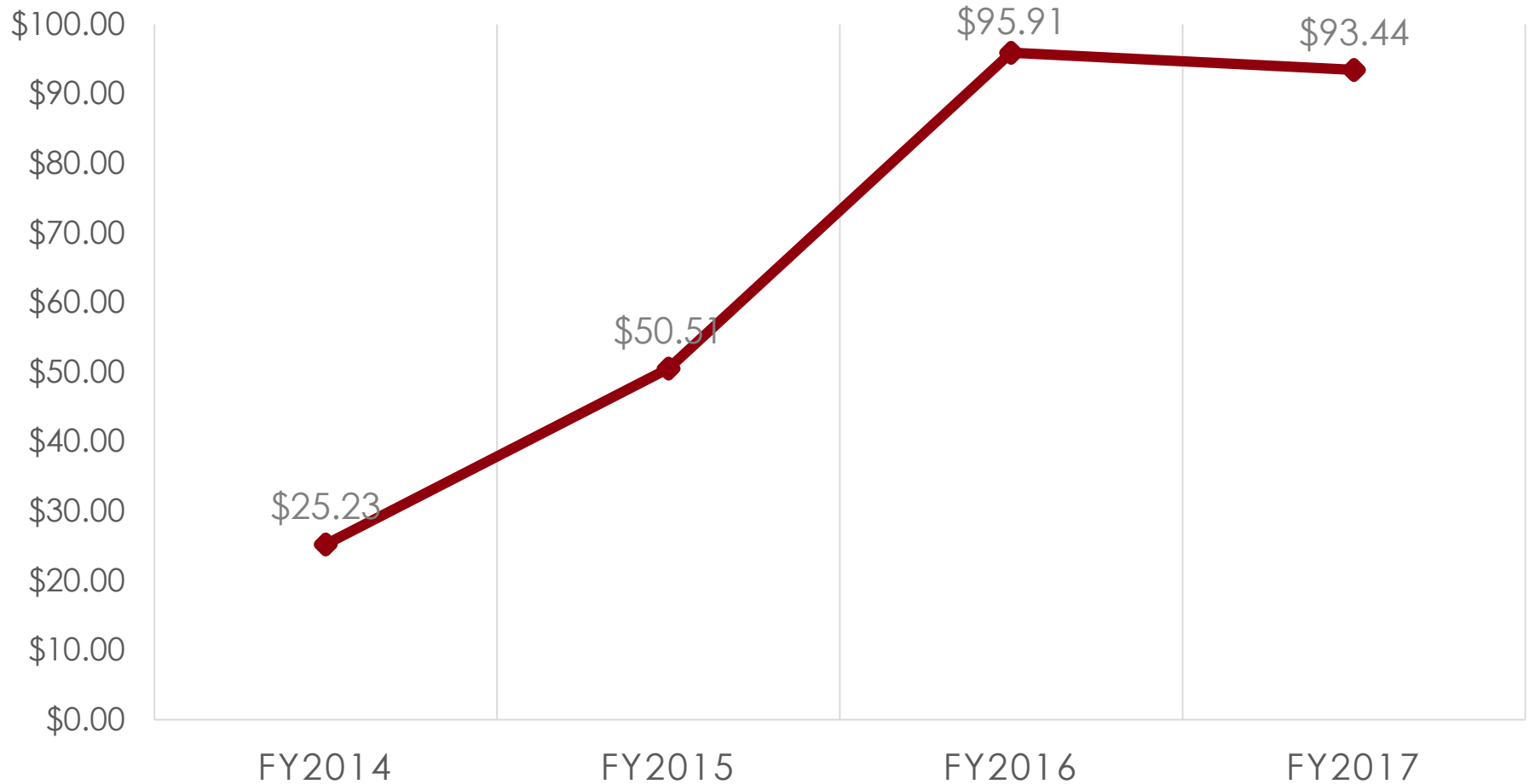
On-Island Per Day Spending – Tracking Mean



On-Island Expenses by Category – Mean Entire Travel Party

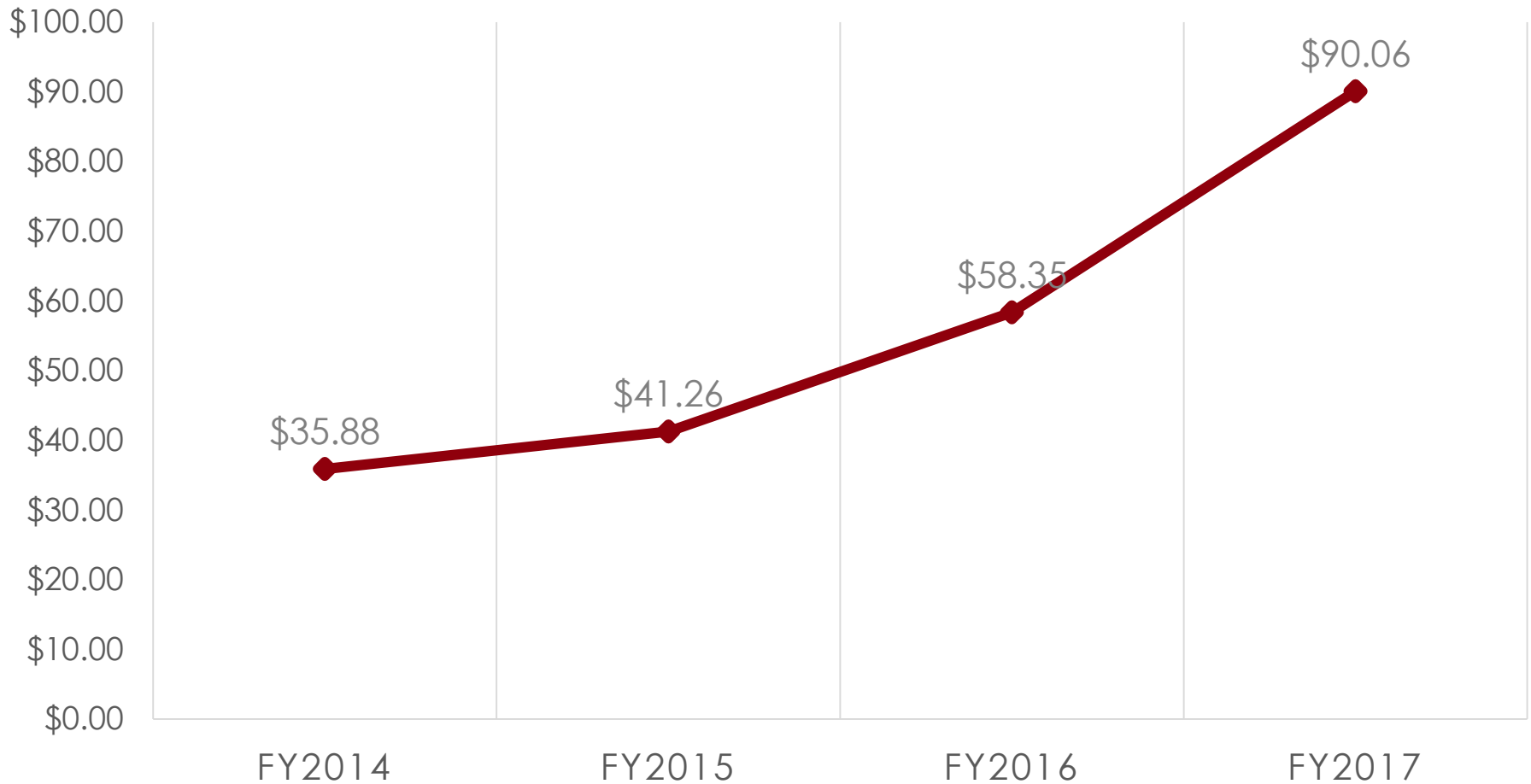


On-Island – Tracking Food & Beverage - Hotel



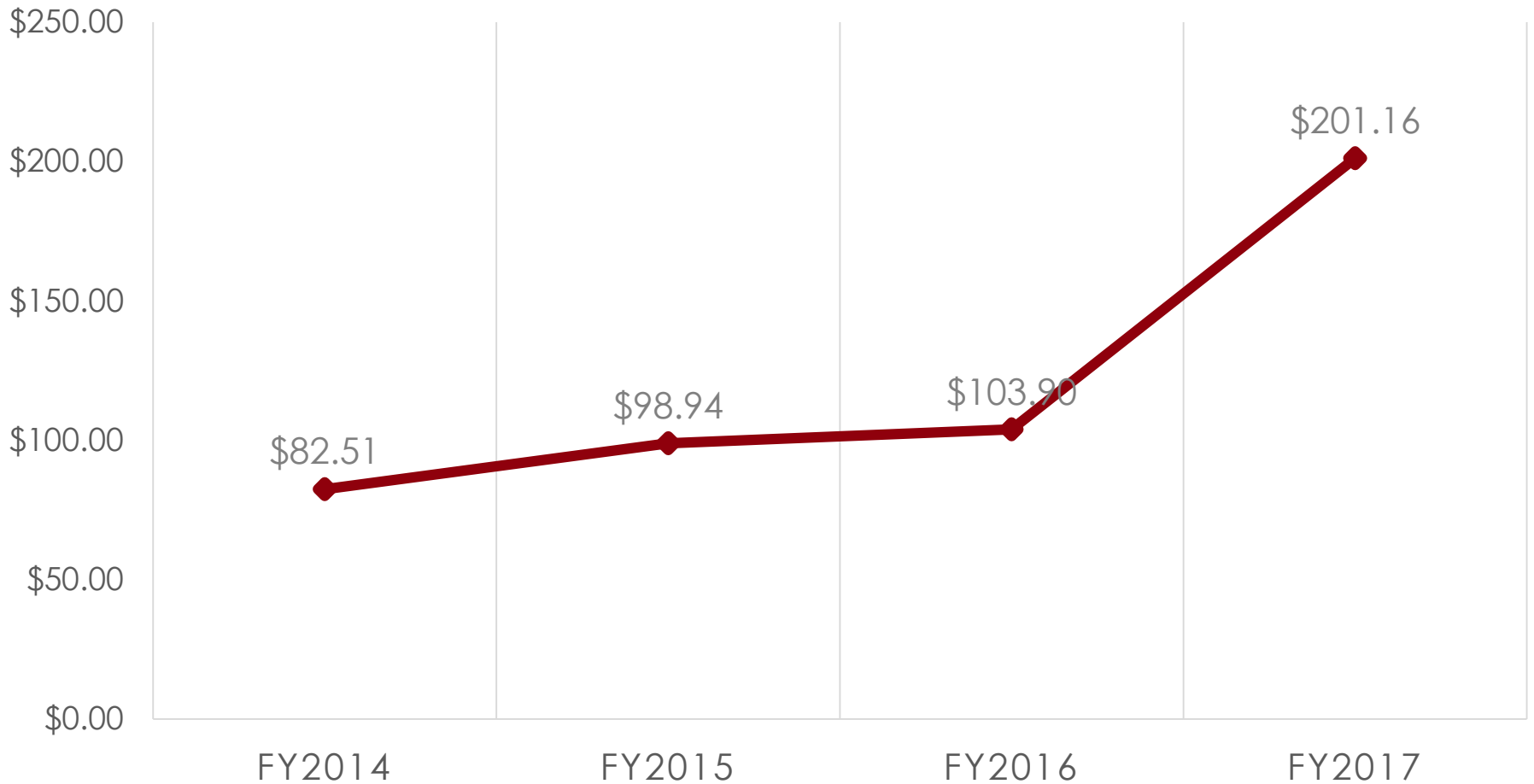
On-Island – Tracking

Food & Beverage – Fast Food/ Convenience Store

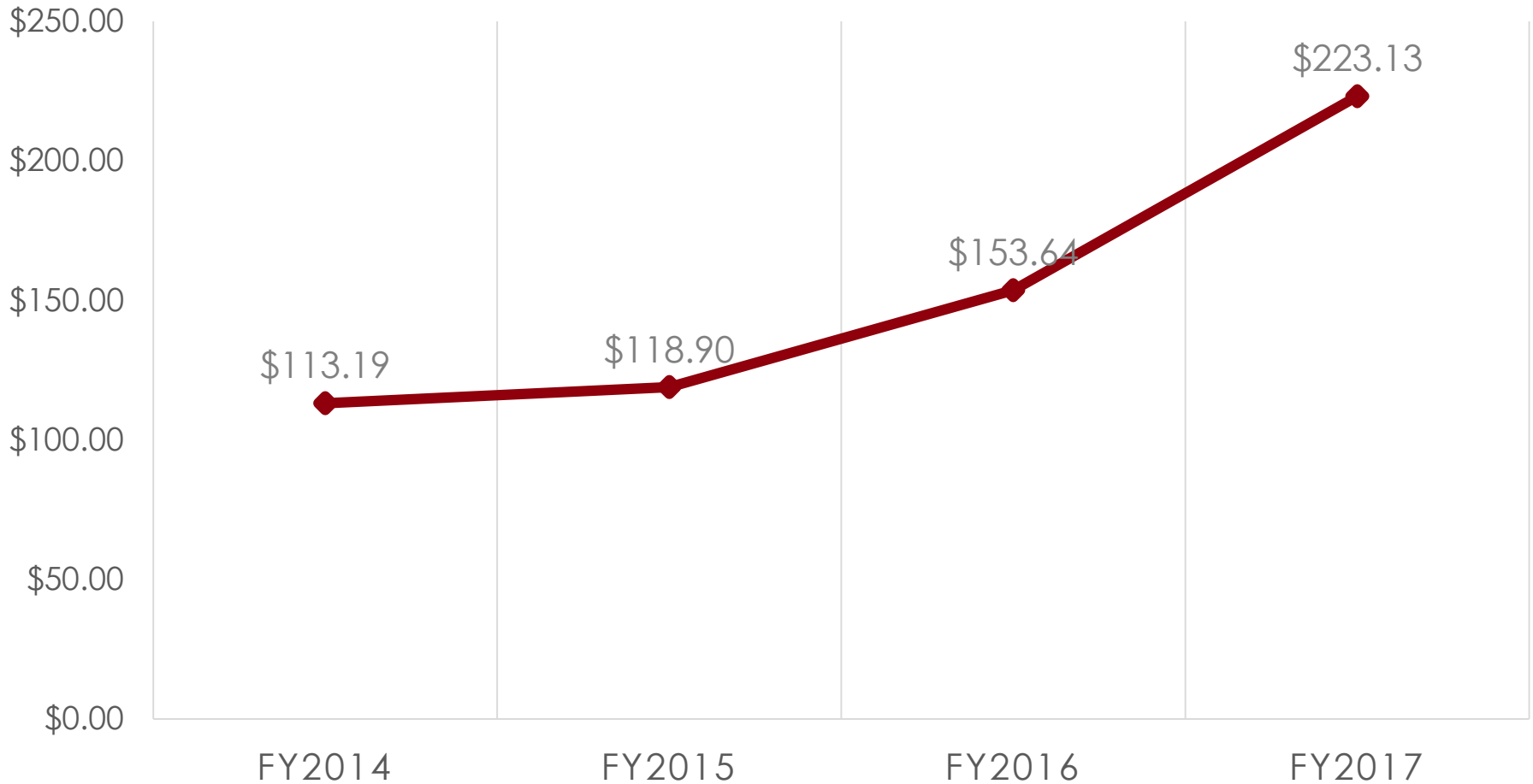


On-Island – Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel

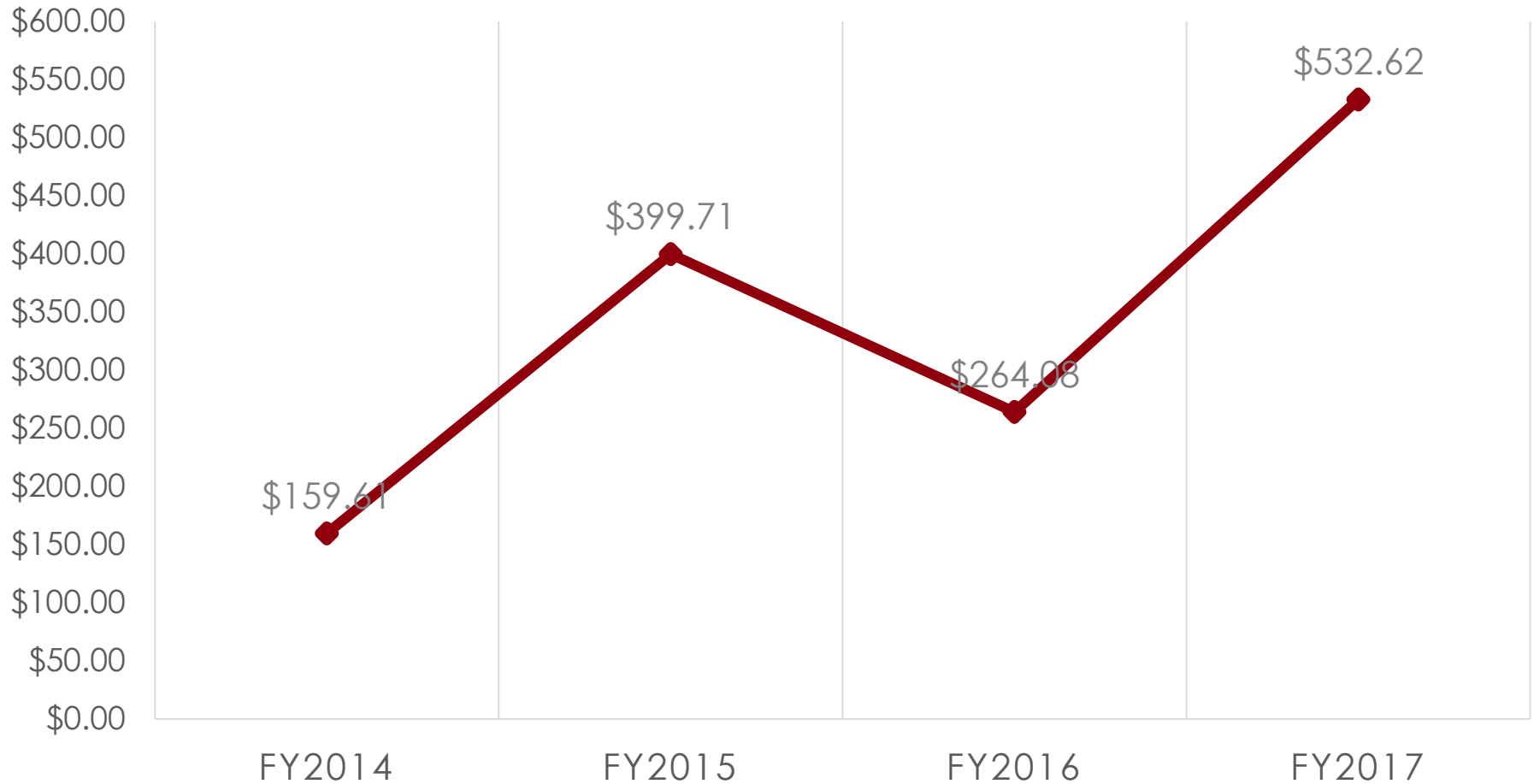


On-Island – Tracking Optional tour/ Activities

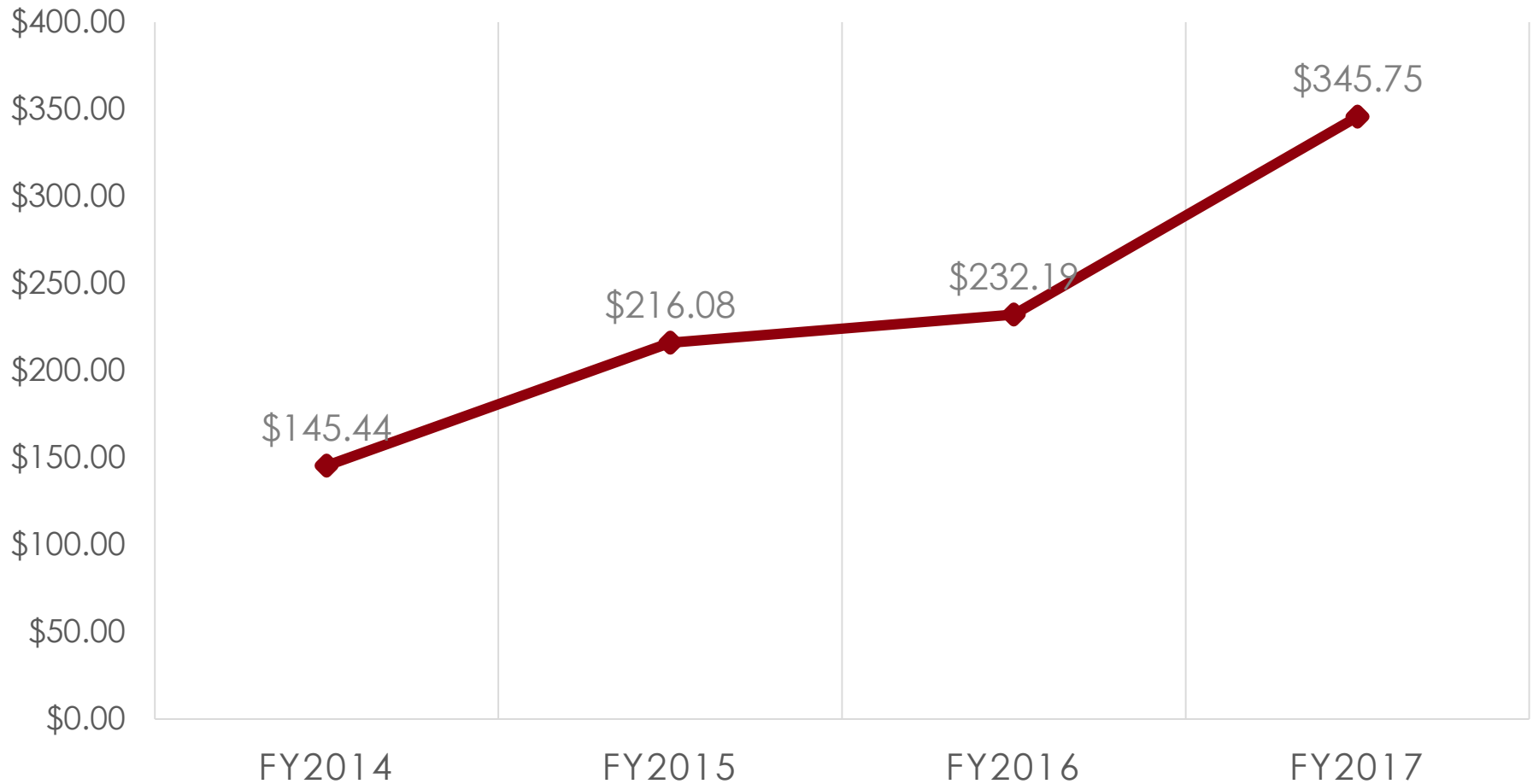


On-Island – Tracking

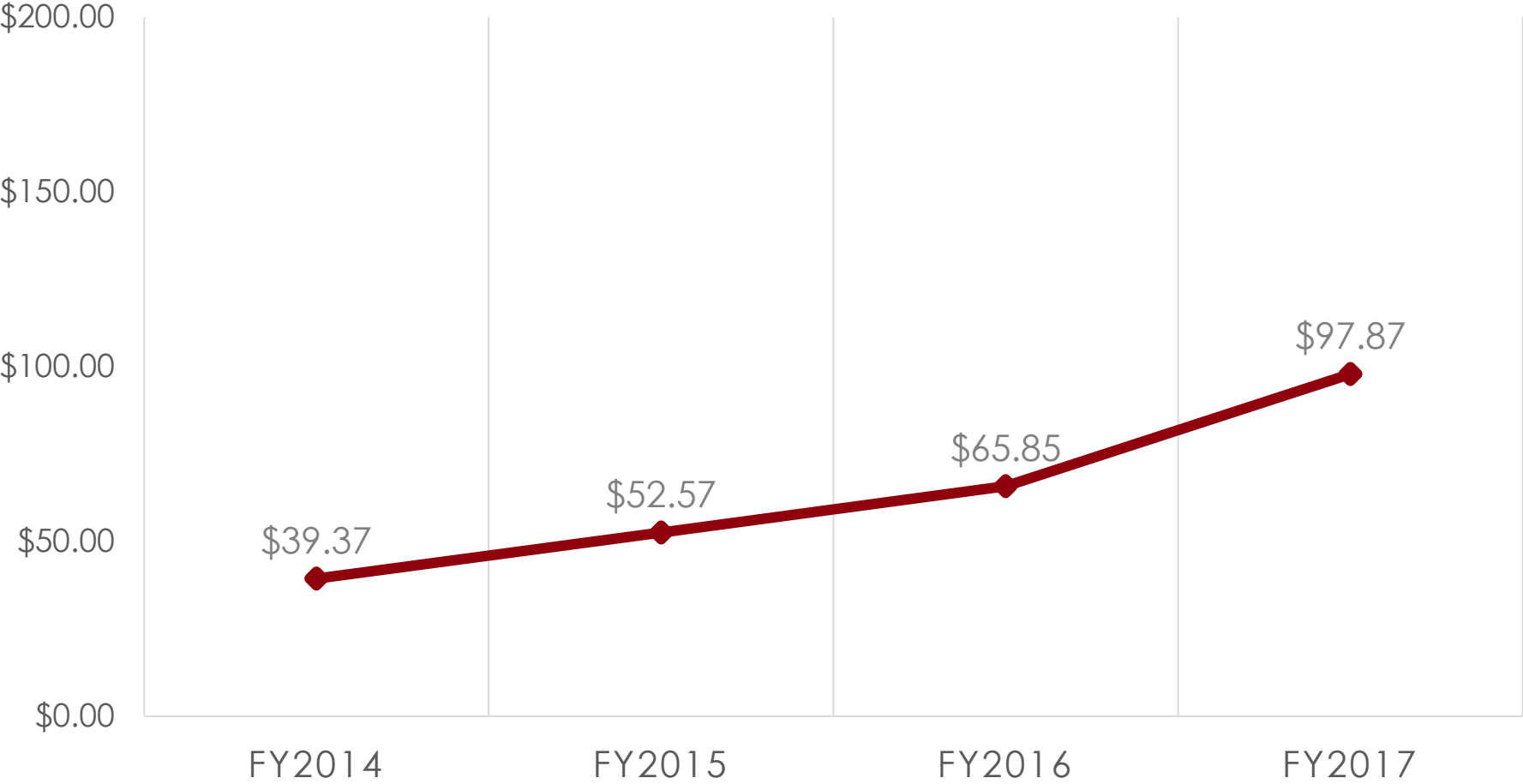
Gift/ Souvenir – Self/ Companion



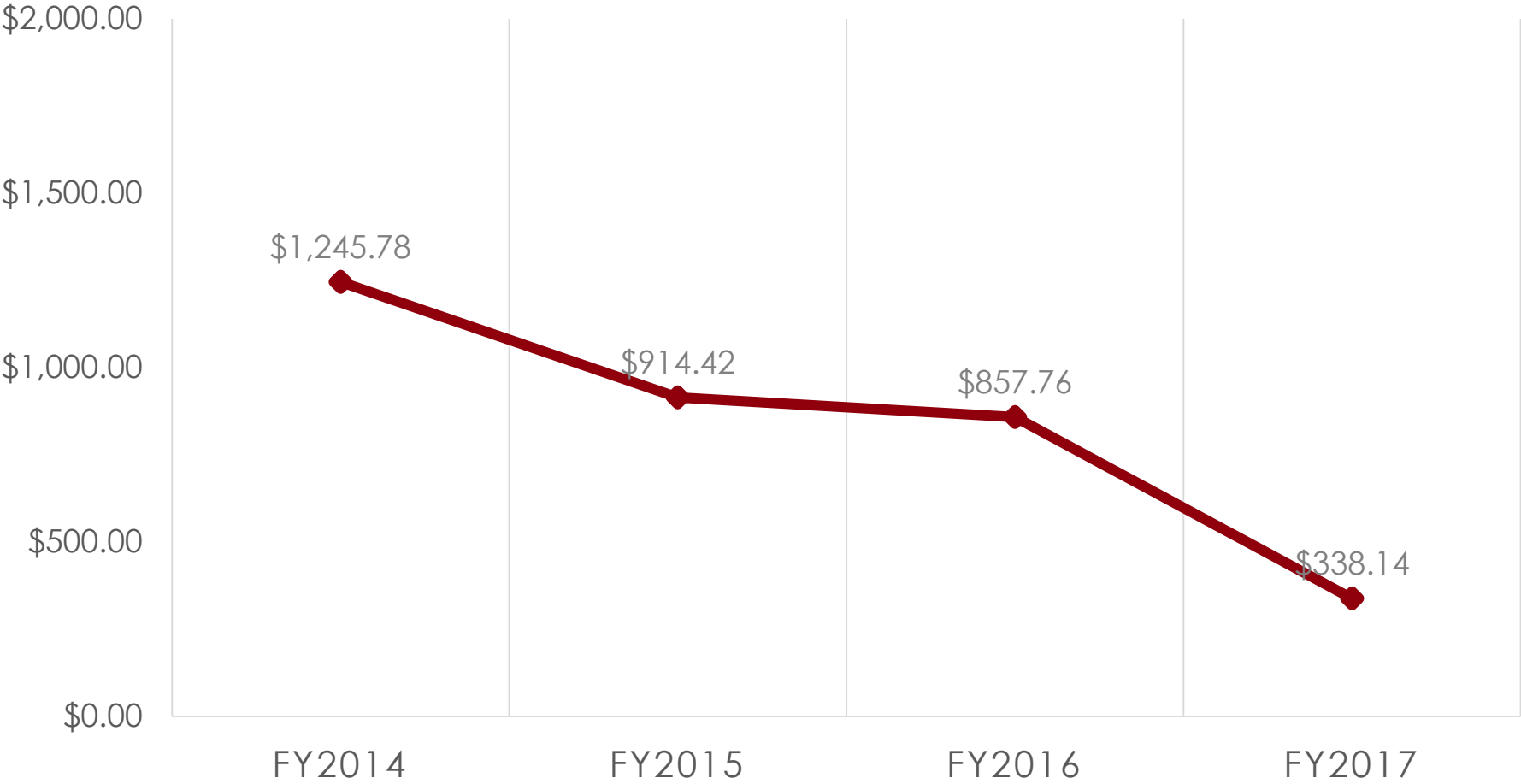
On-Island – Tracking Gift/ Souvenir – Friends/ Family



On-Island – Tracking Local Transportation



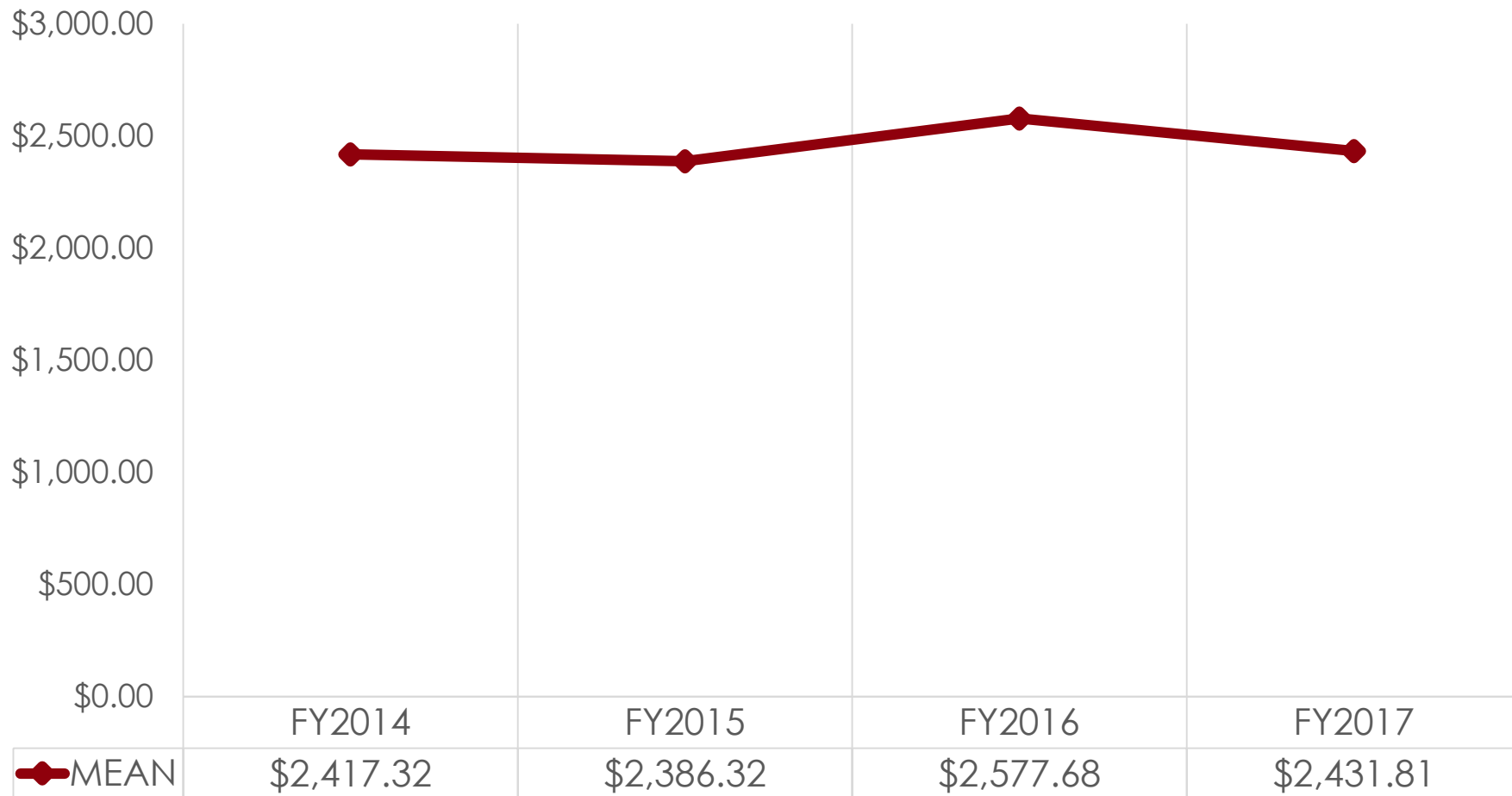
On-Island – Tracking Other Not Included



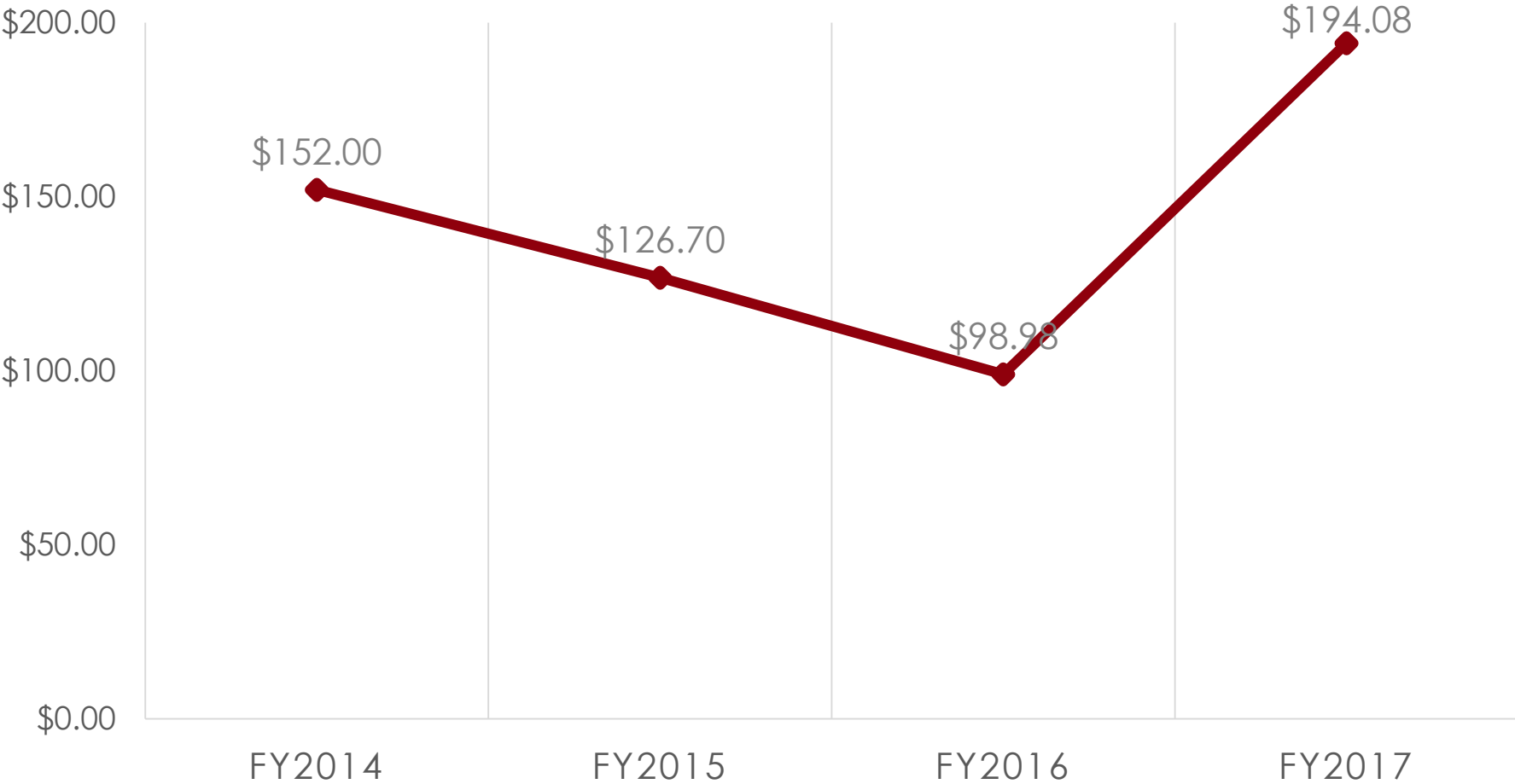
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$2,431.81 = overall mean average prepaid expense by respondent

TOTAL Per Person Expenditures – Tracking



GUAM AIRPORT EXPENDITURE – Tracking

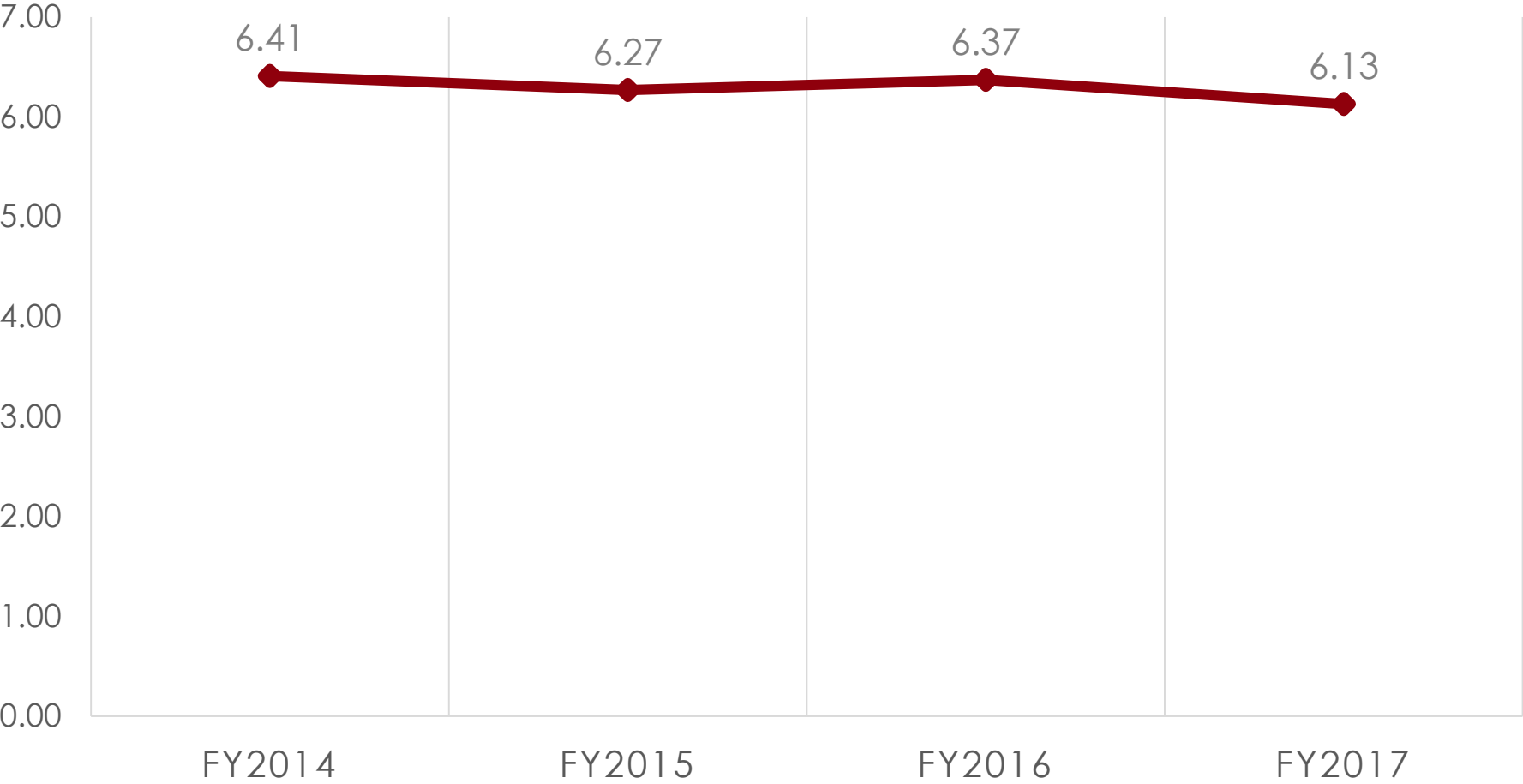


SECTION 4

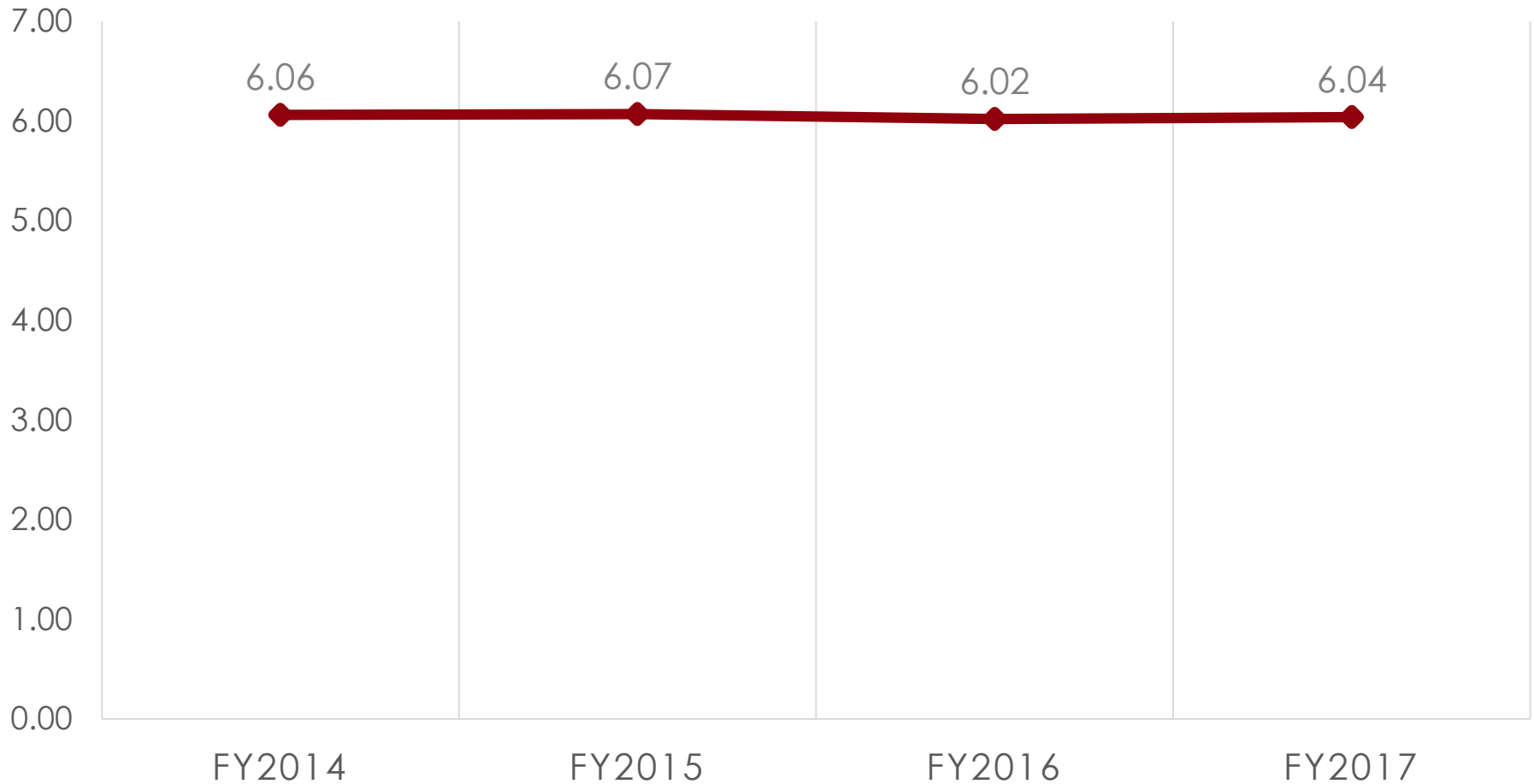
VISITOR SATISFACTION

BEHAVIOR

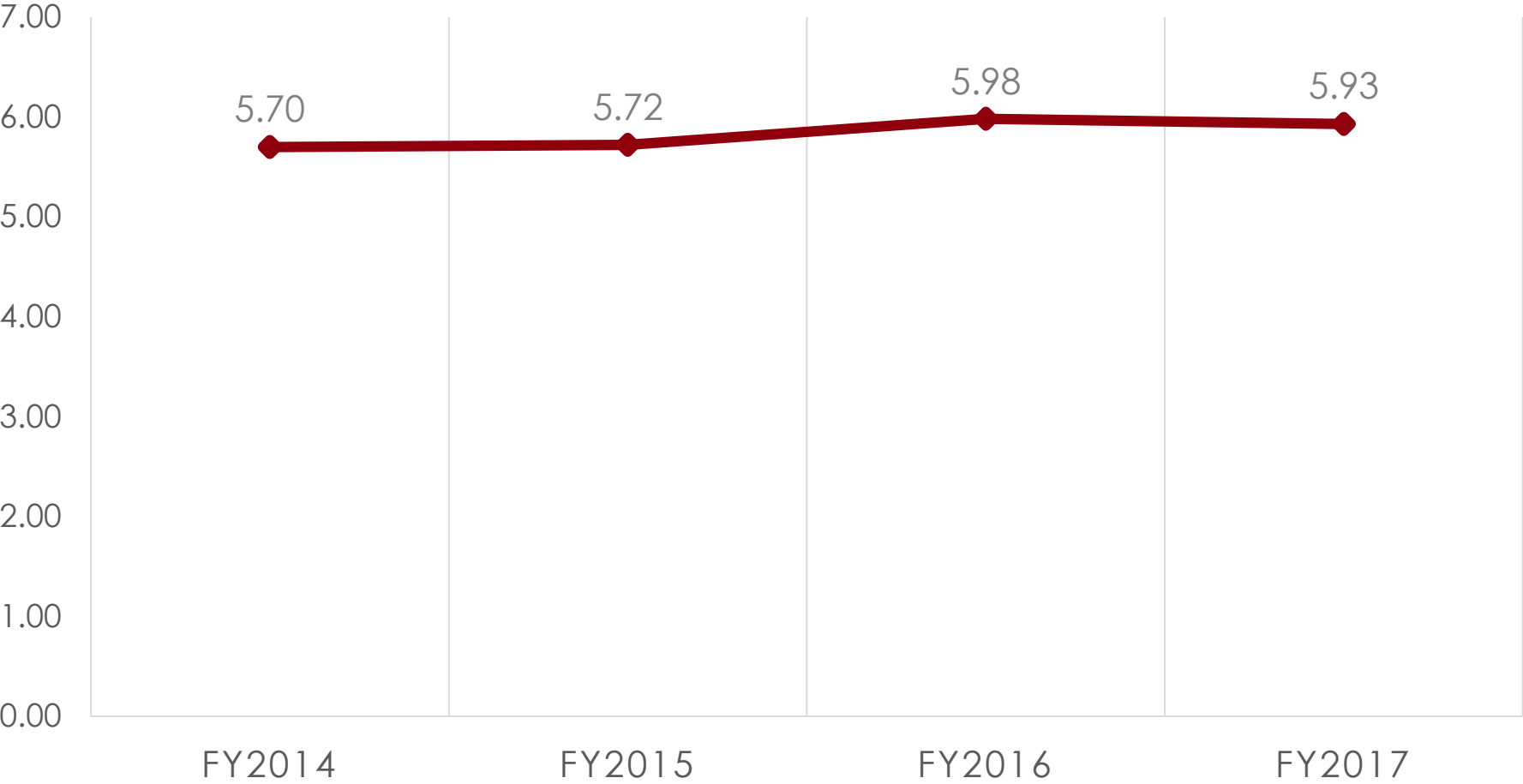
OVERALL SATISFACTION



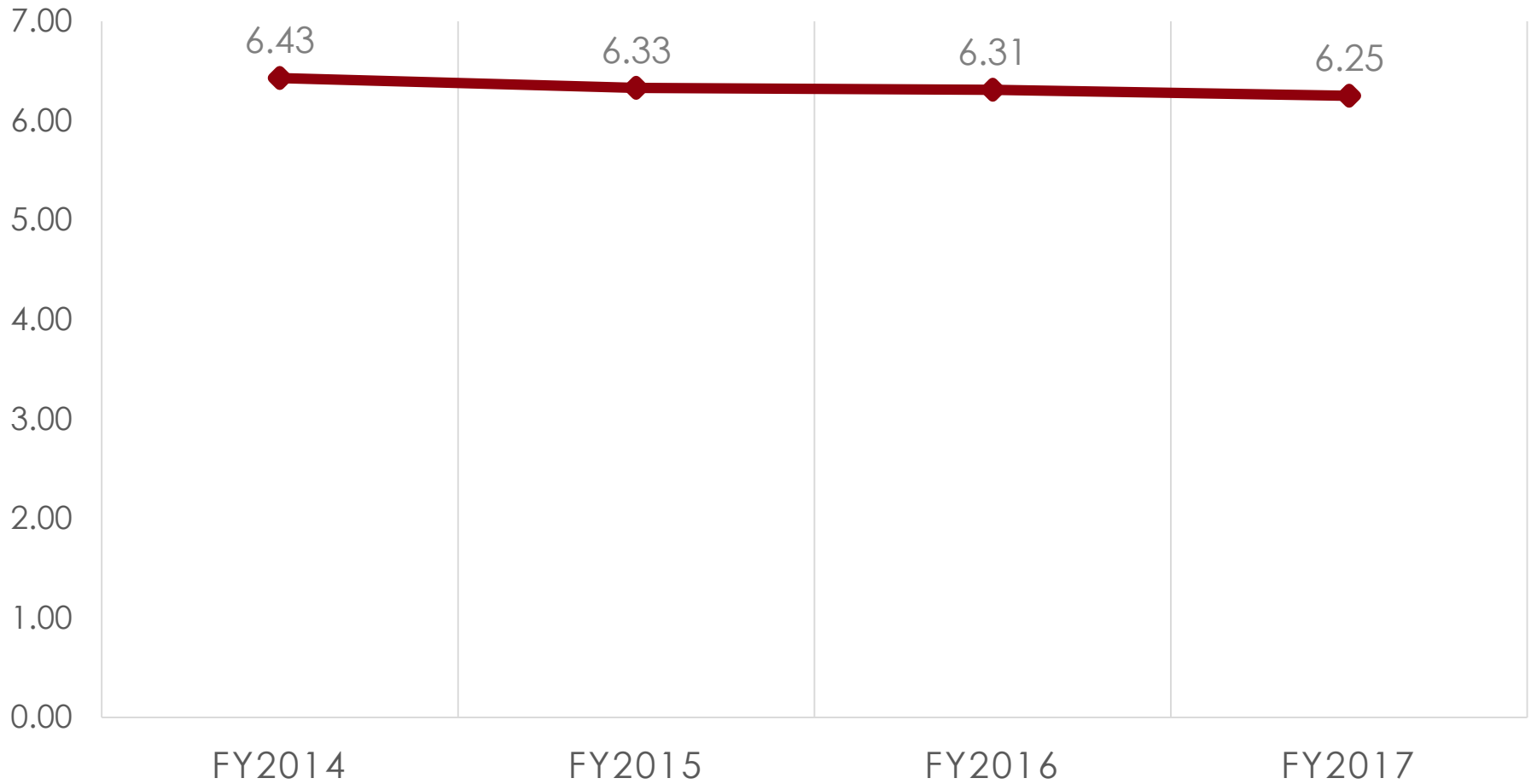
Guam was better than expected



I had no communication problems



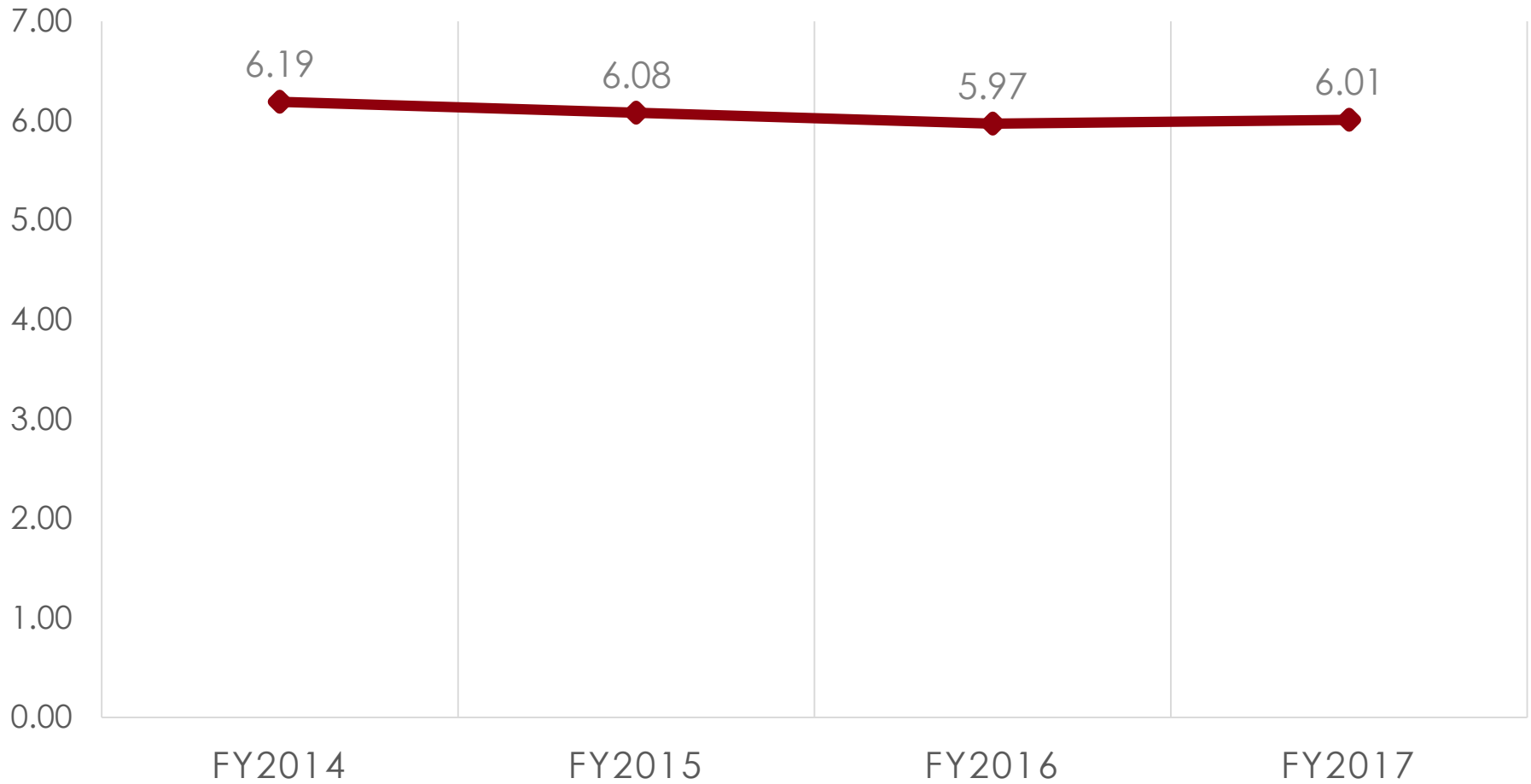
I will recommend Guam to friends



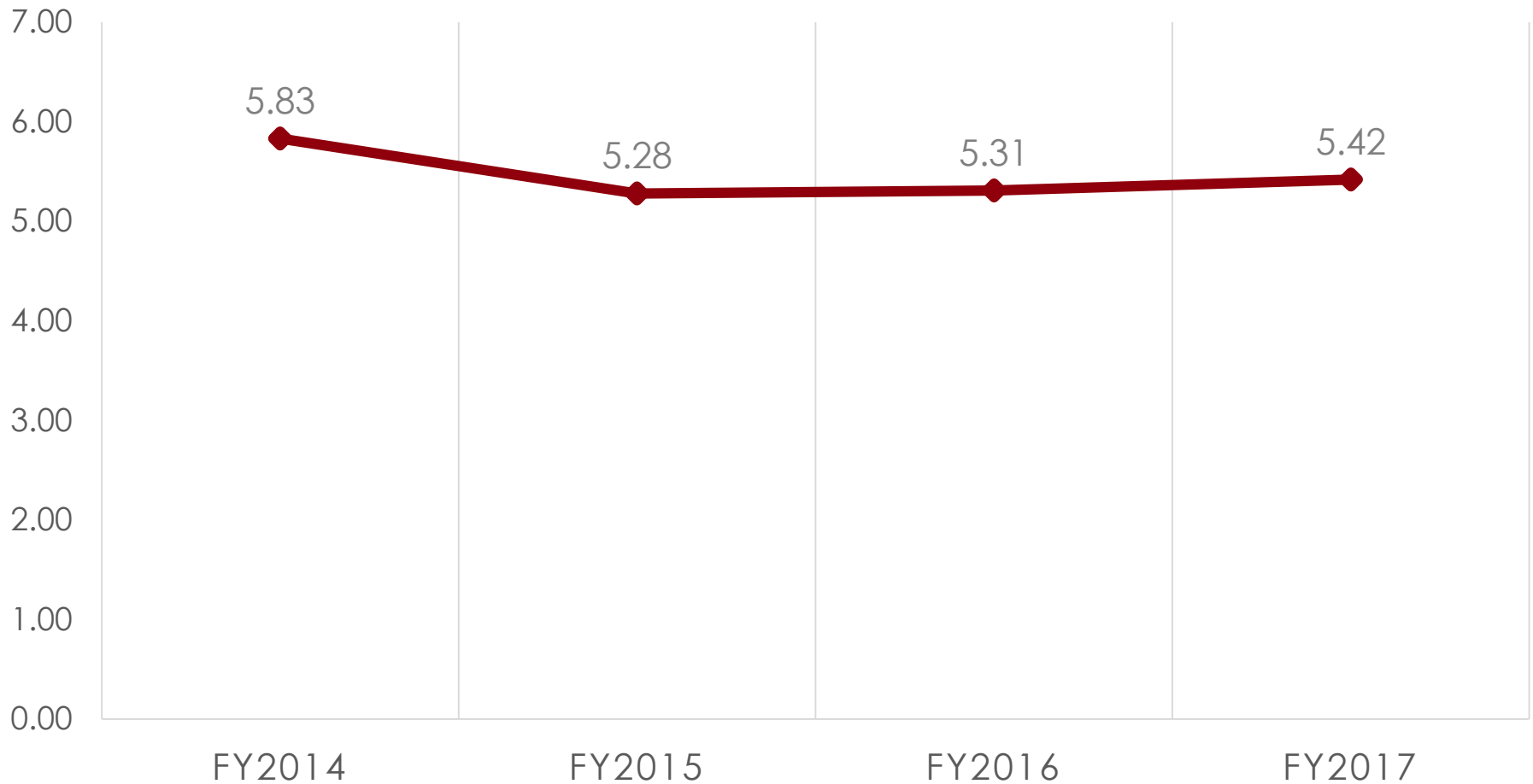
Sites on Guam were attractive



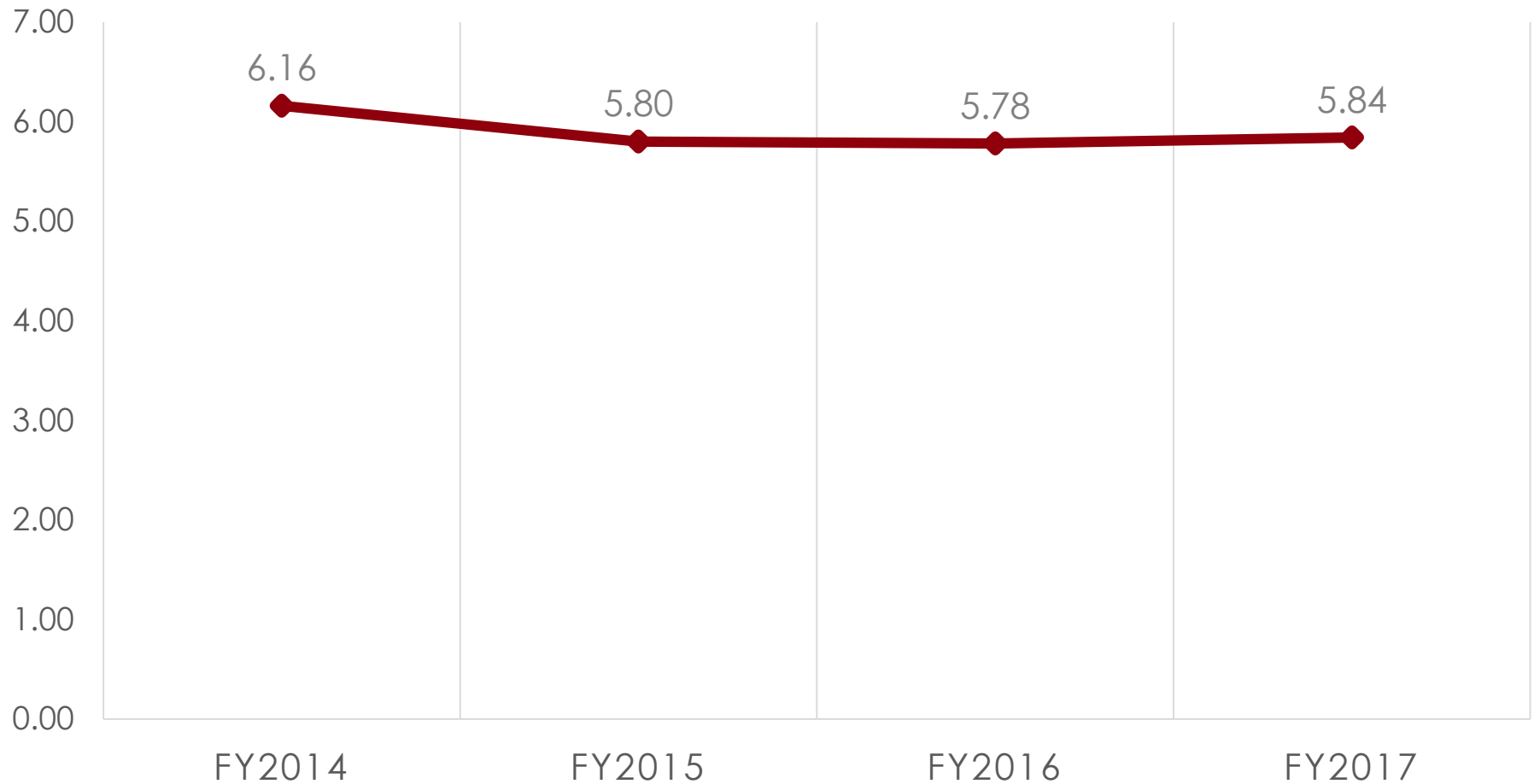
I plan to visit Guam again



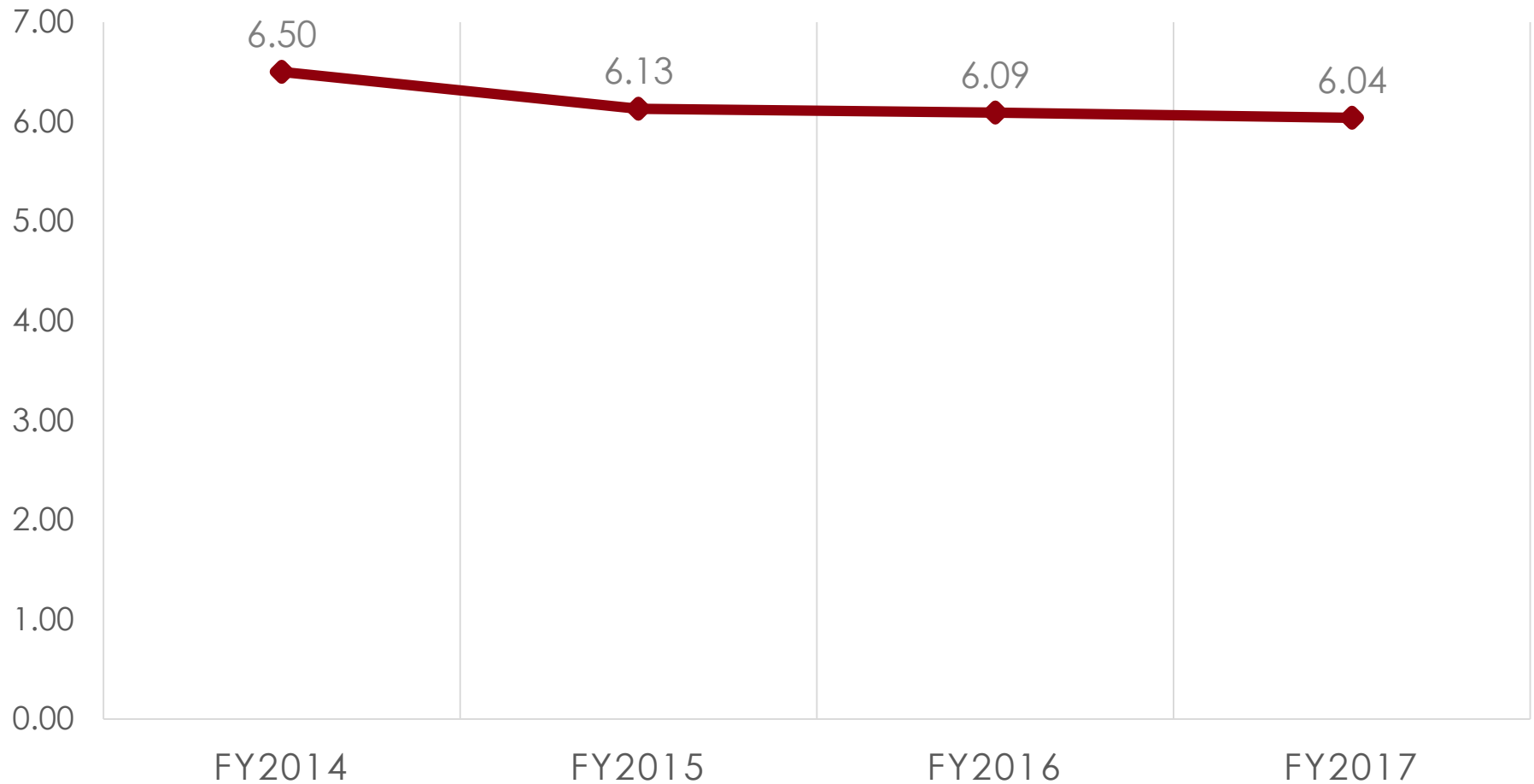
Not enough night time activities



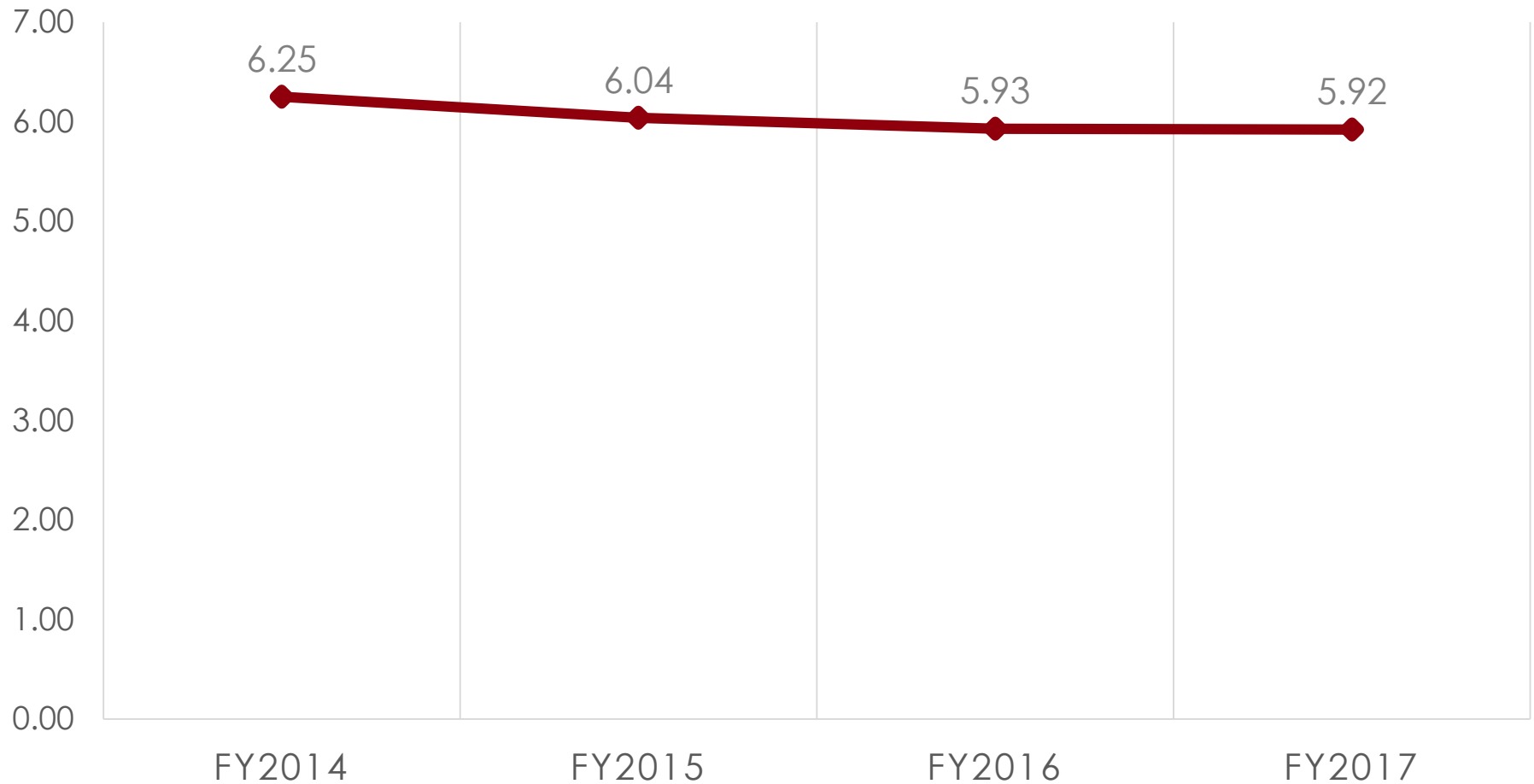
Tour guides were professional



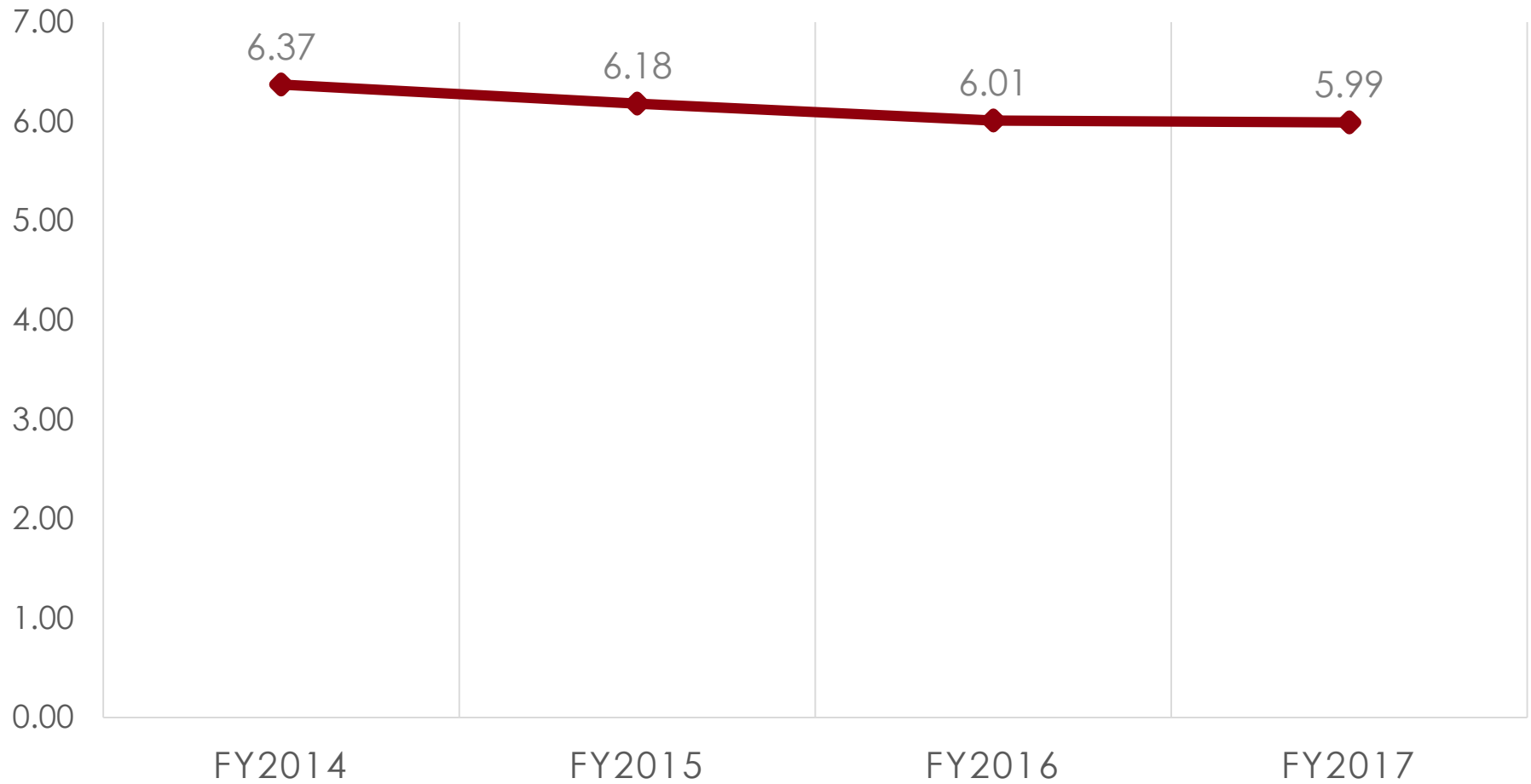
Tour drivers were professional



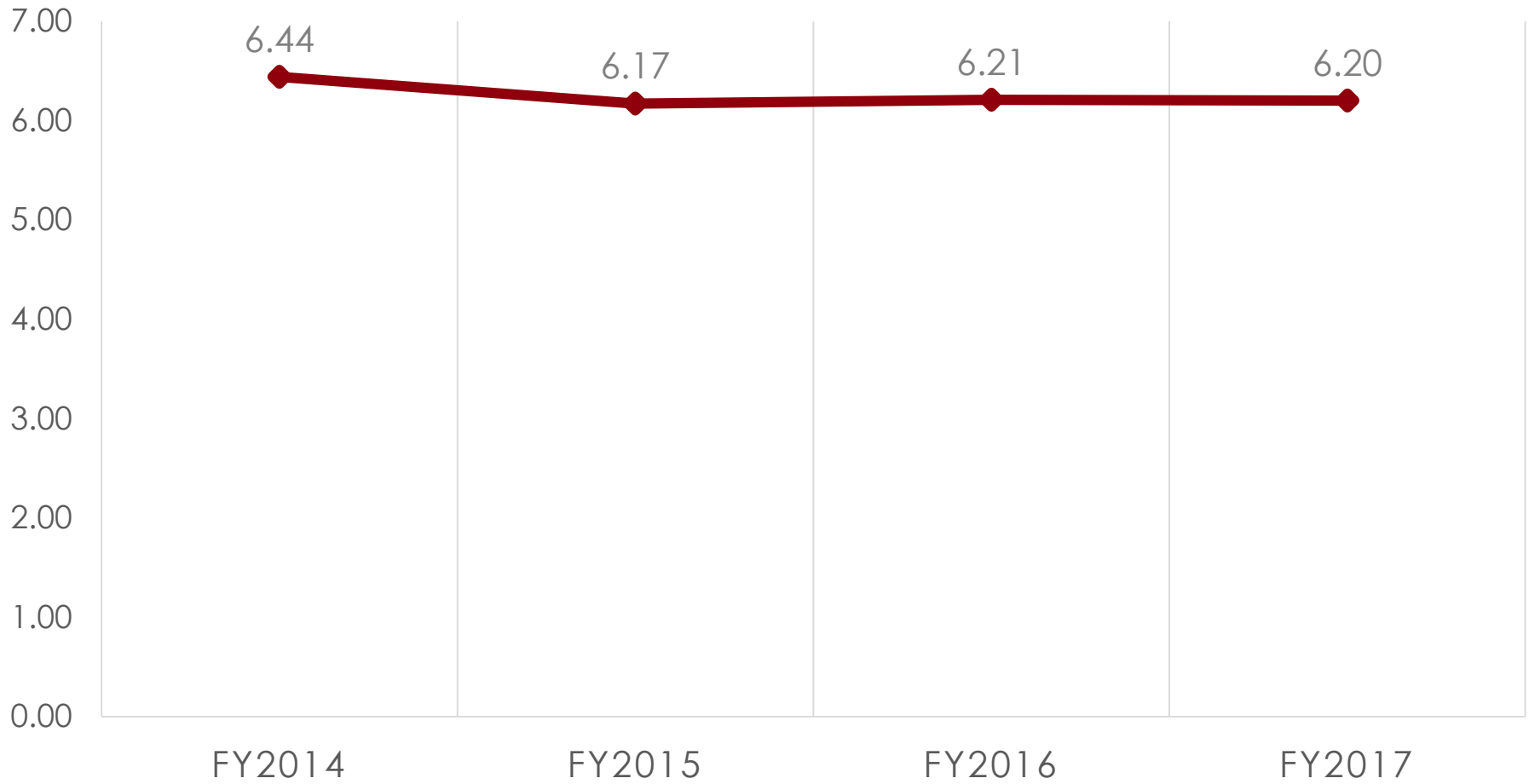
Taxi drivers were professional



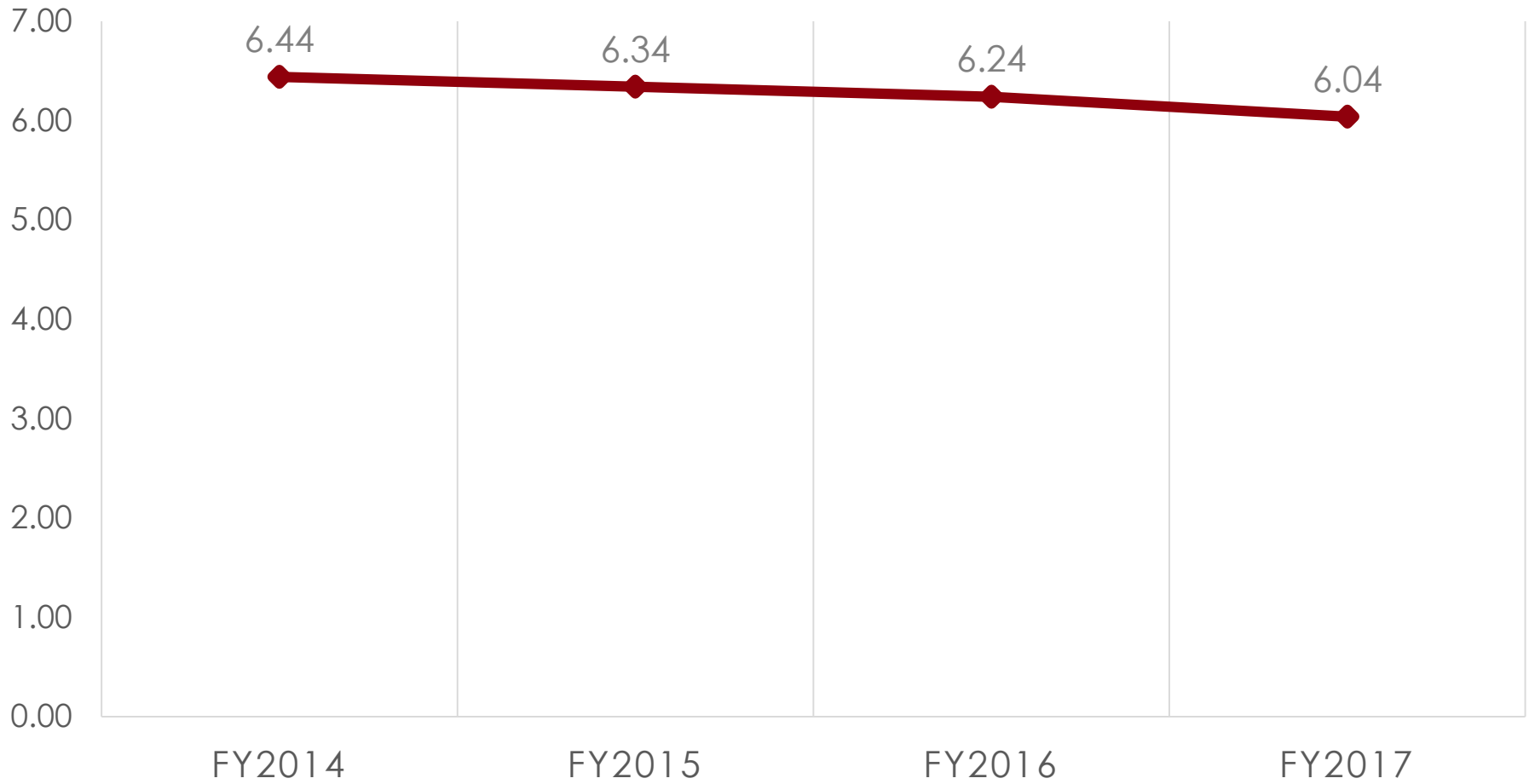
Taxis were clean



Guam airport was clean



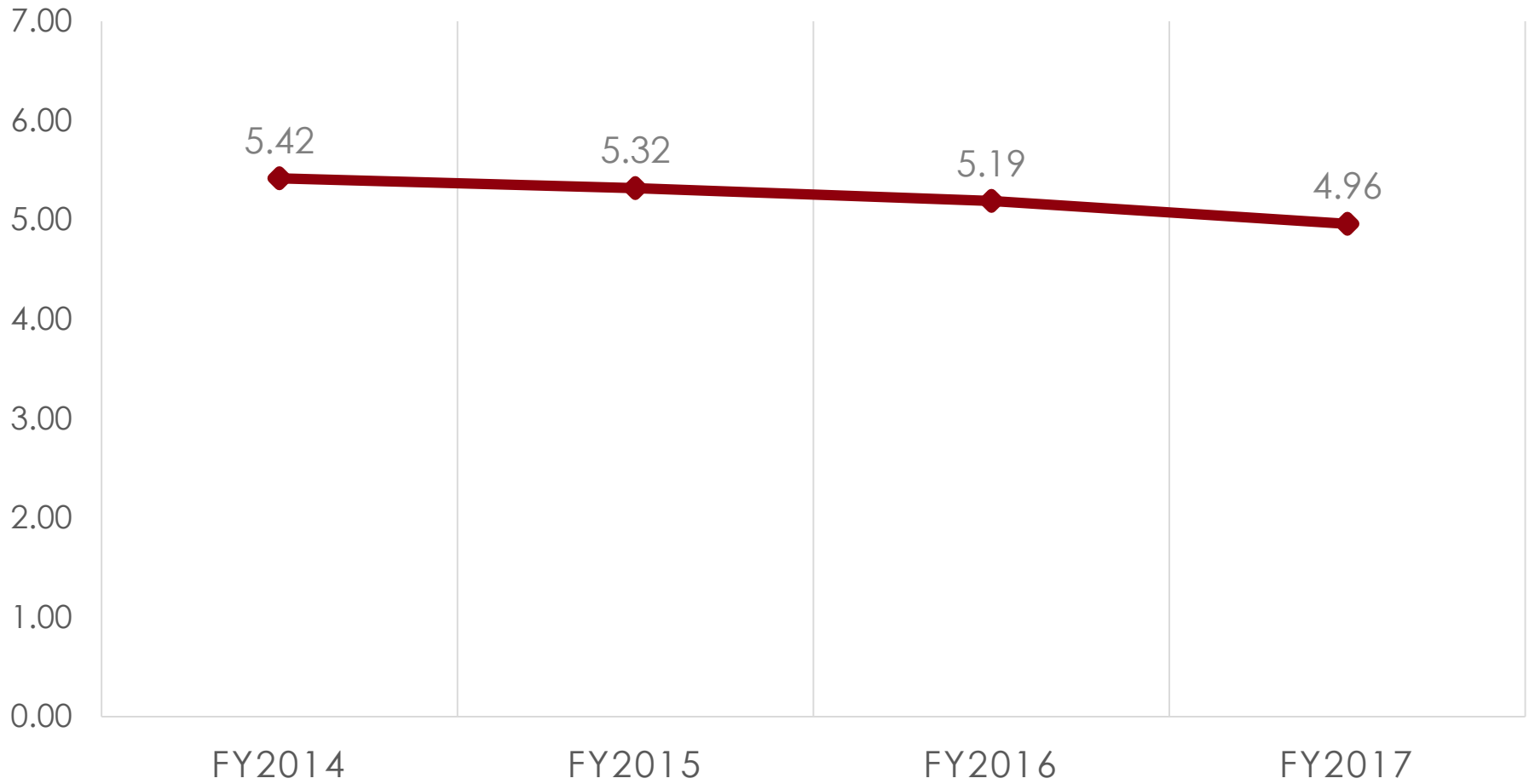
Ease of getting around



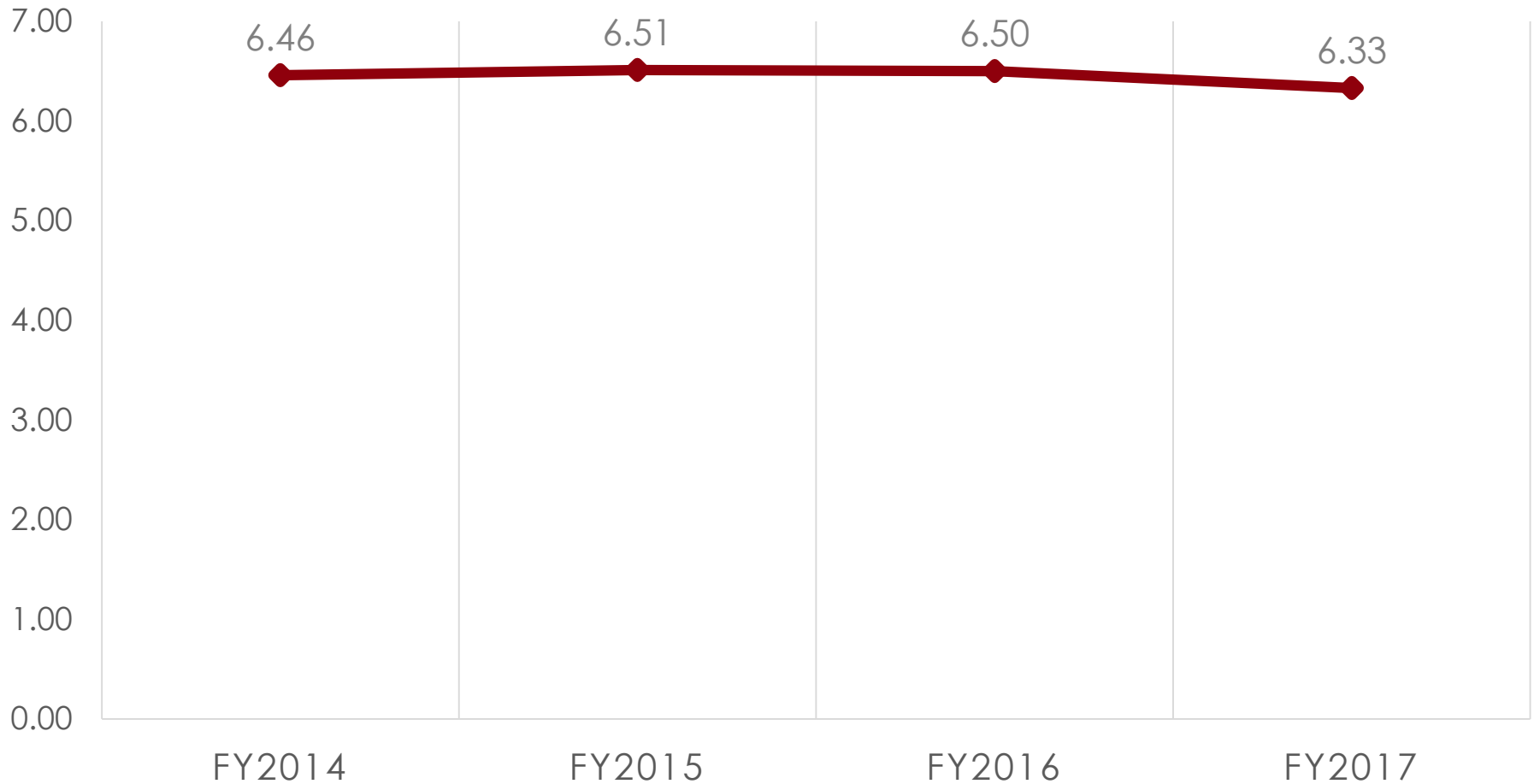
Safety walking around at night



Price of things on Guam



Quality/ Cleanliness- beach, ocean



Quality/ Cleanliness- air, sky



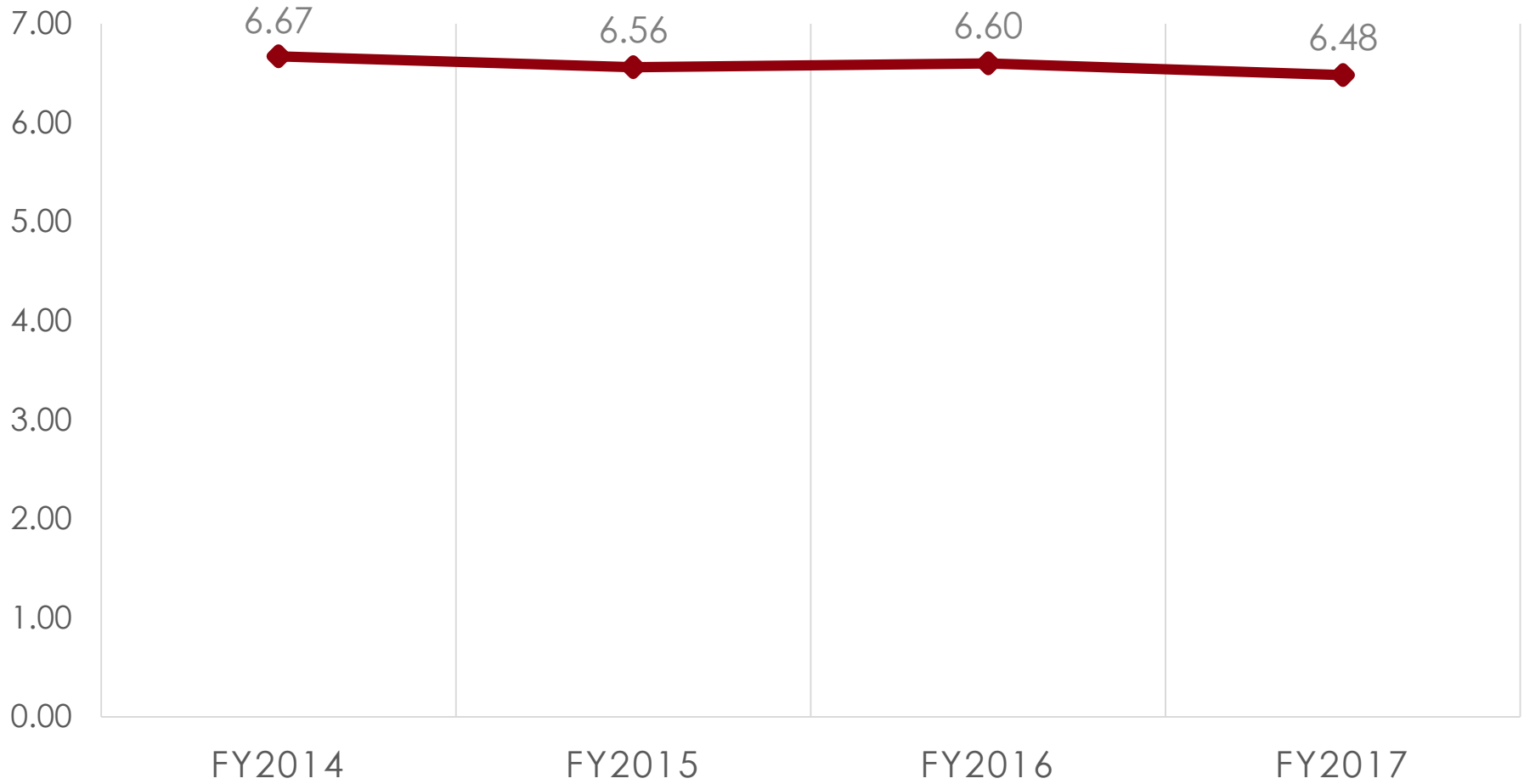
Quality/ Cleanliness- parks



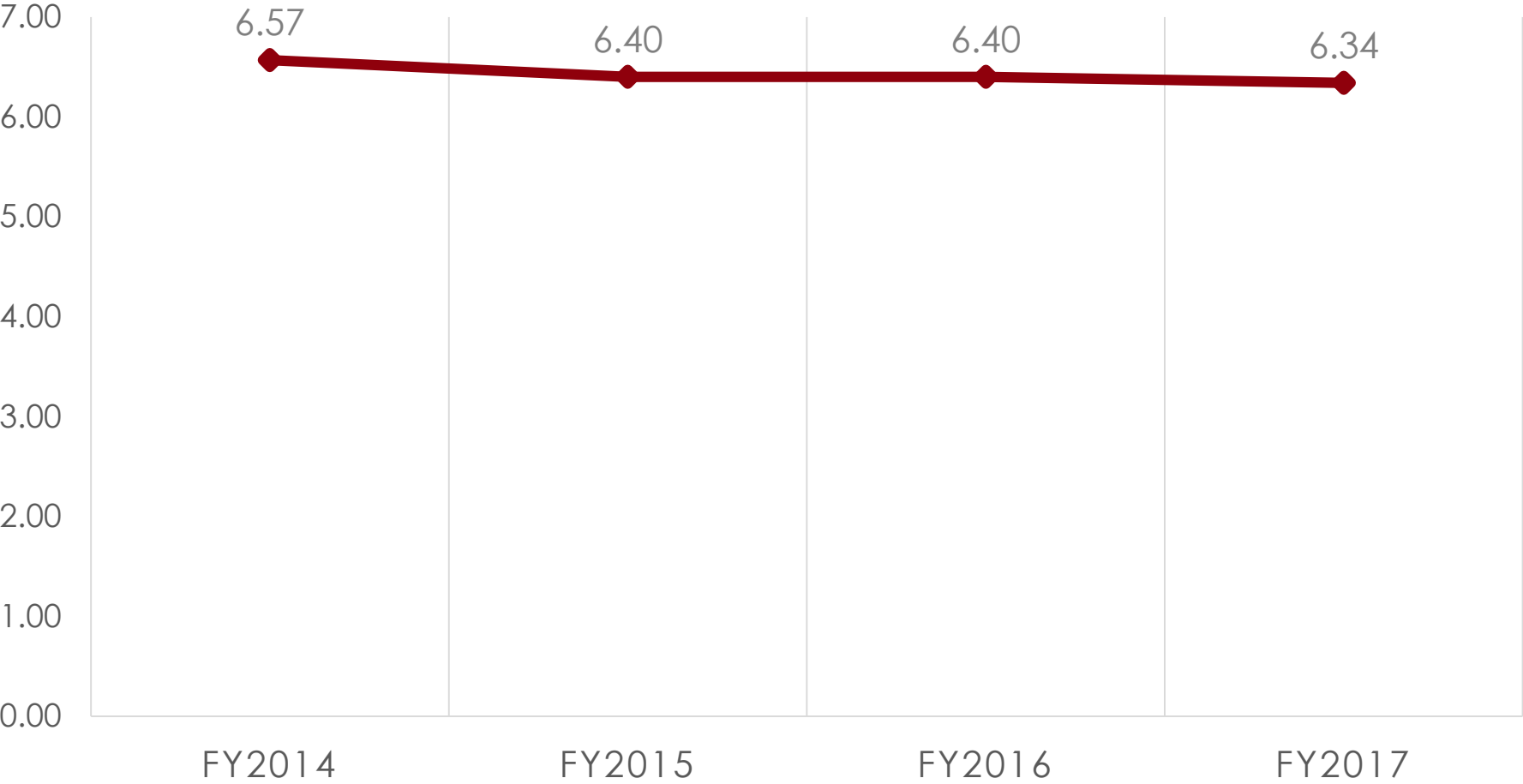
Quality- landscape Tumon



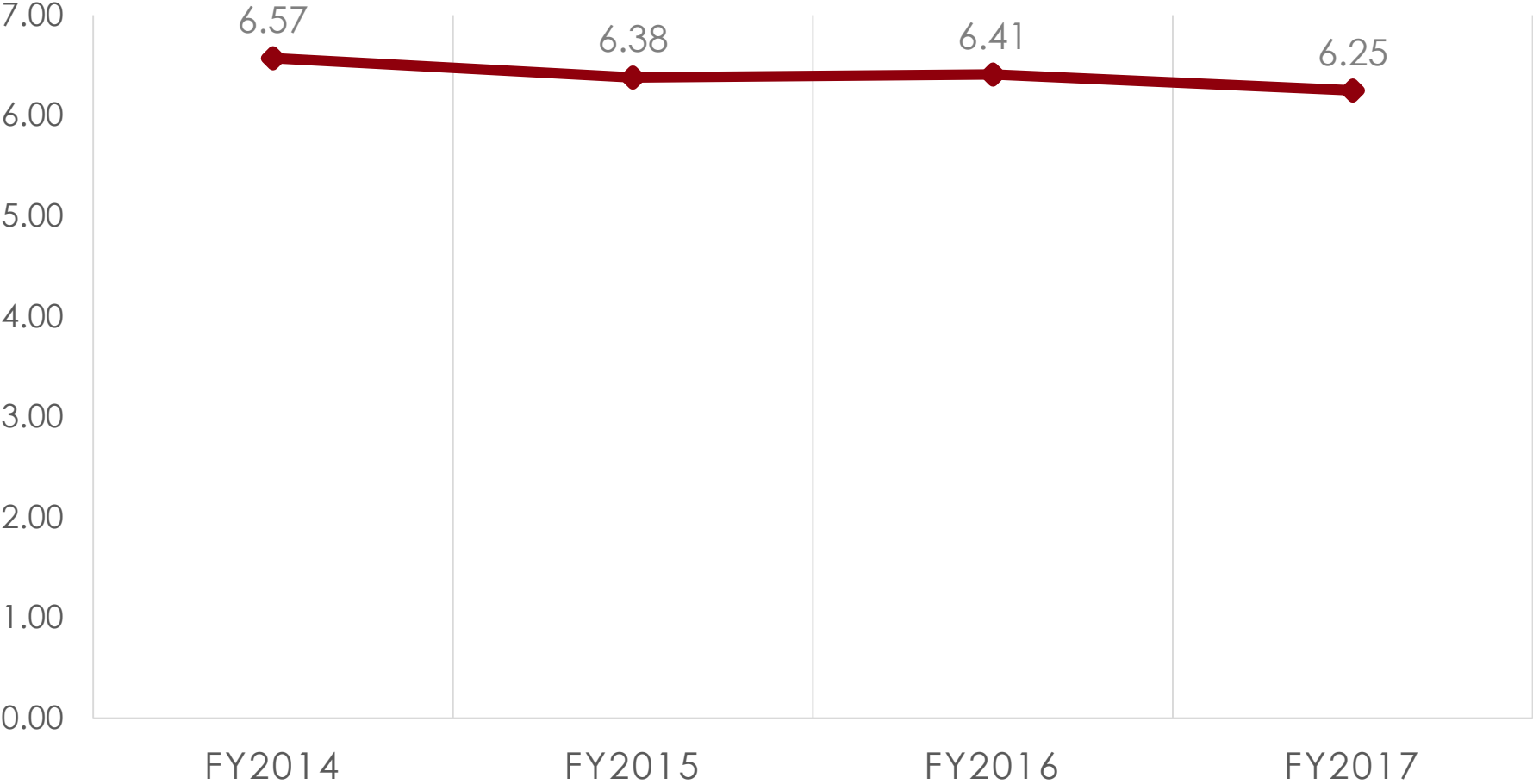
Quality- landscape Guam



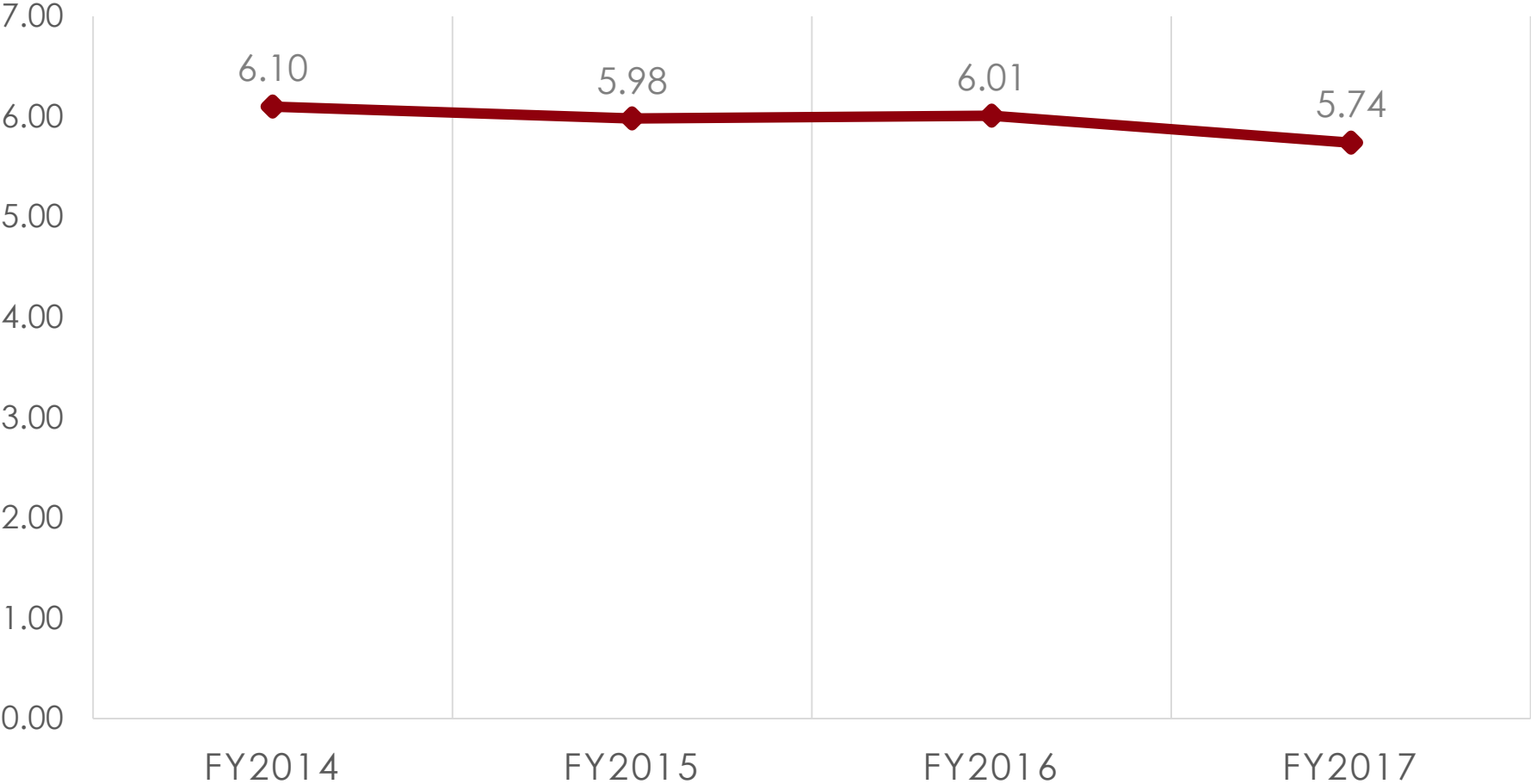
Quality- ground handler



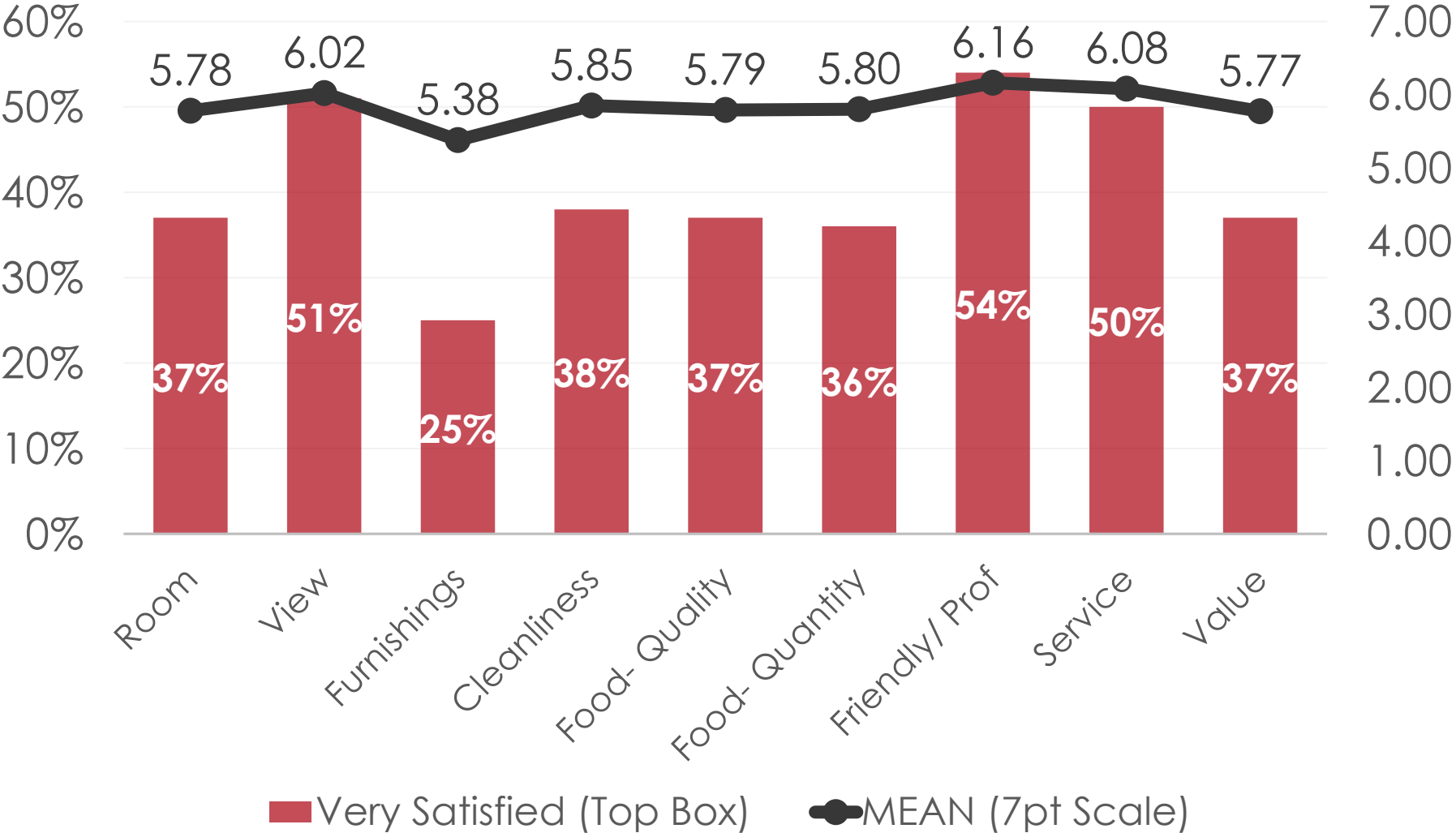
Quality/ Cleanliness- transportation vehicle



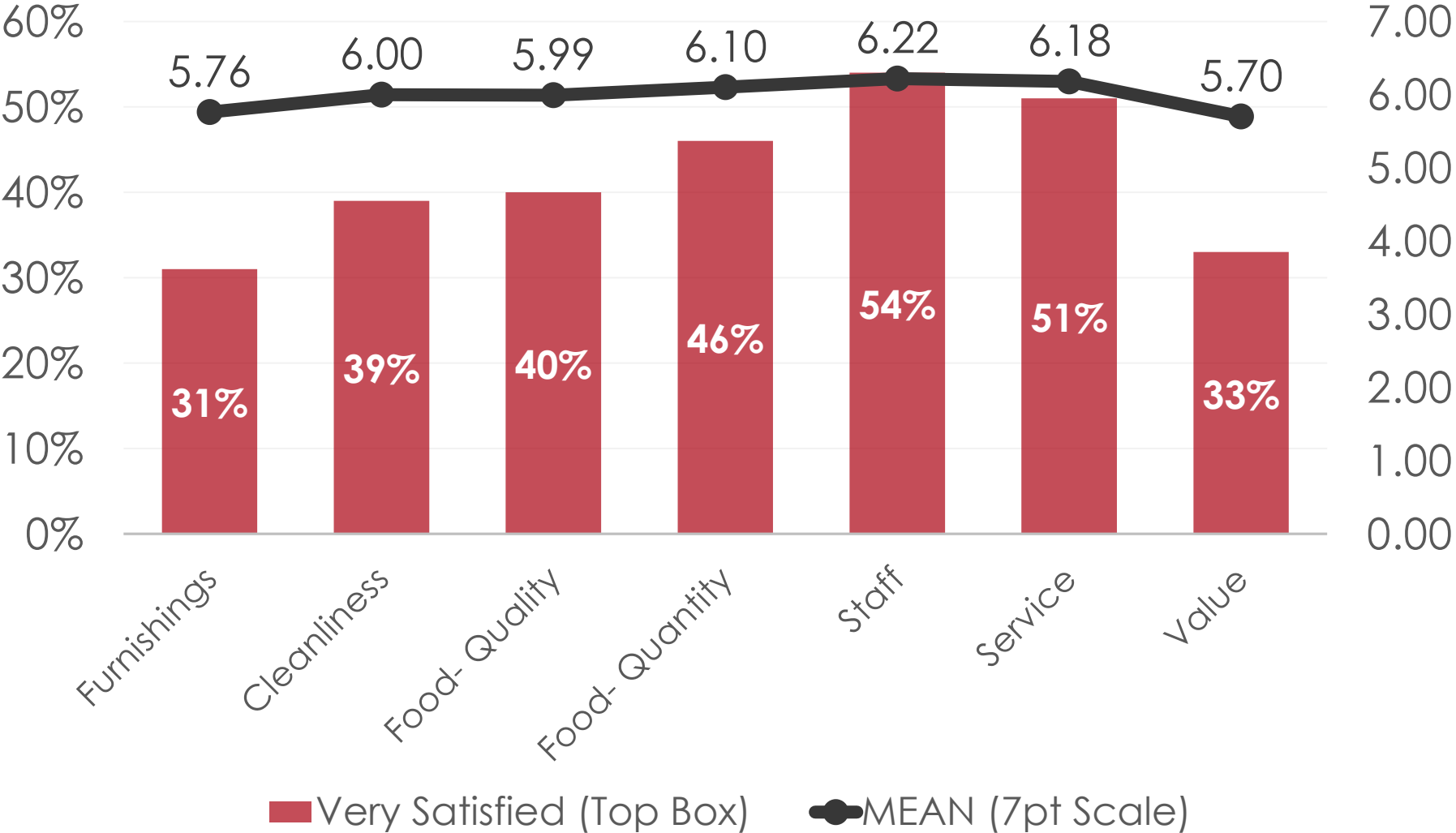
ACCOMMODATIONS OVERALL SATISFACTION



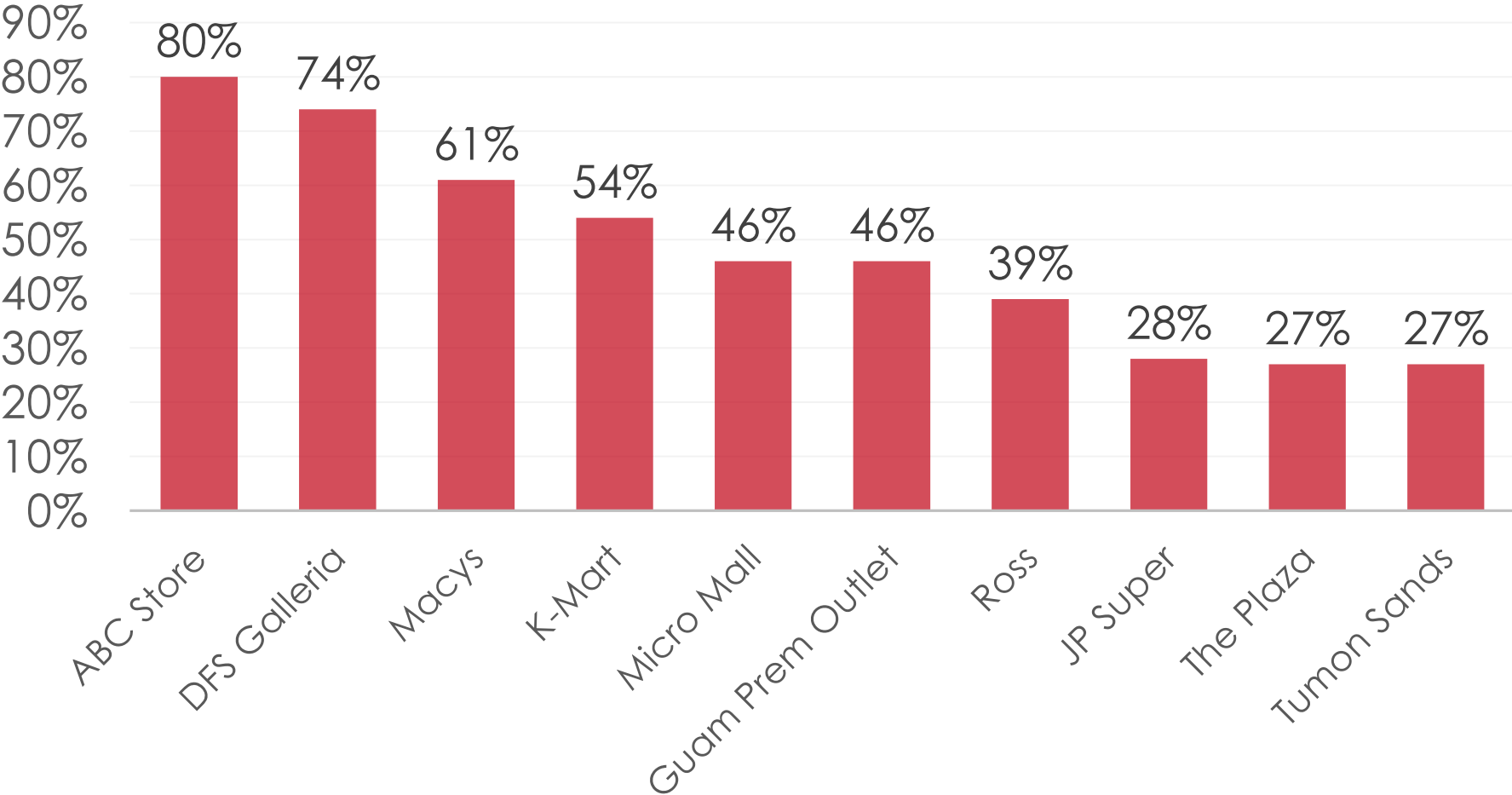
ACCOMMODATIONS – Satisfaction by Category



DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



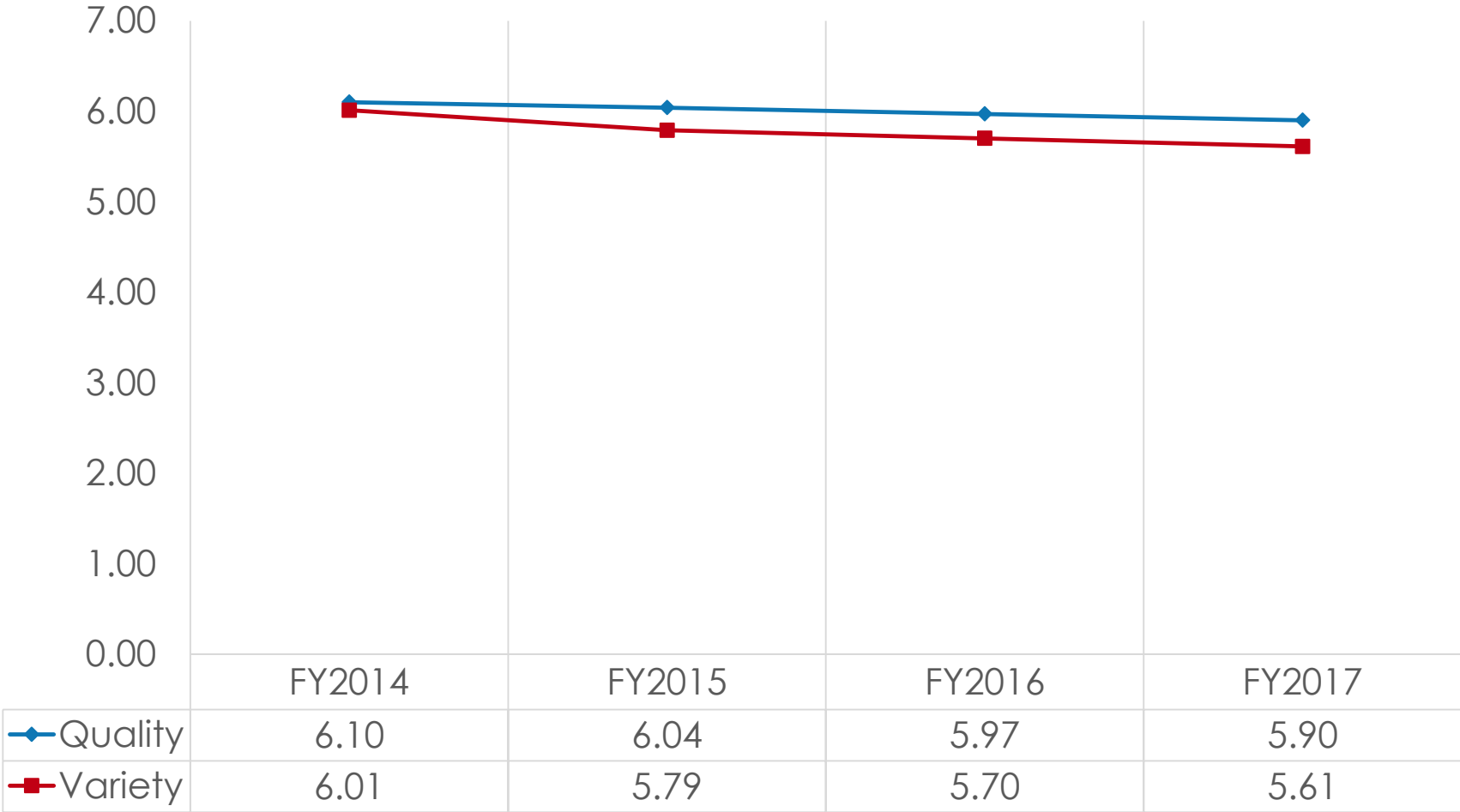
Shopping Malls/ Stores (Top Responses)



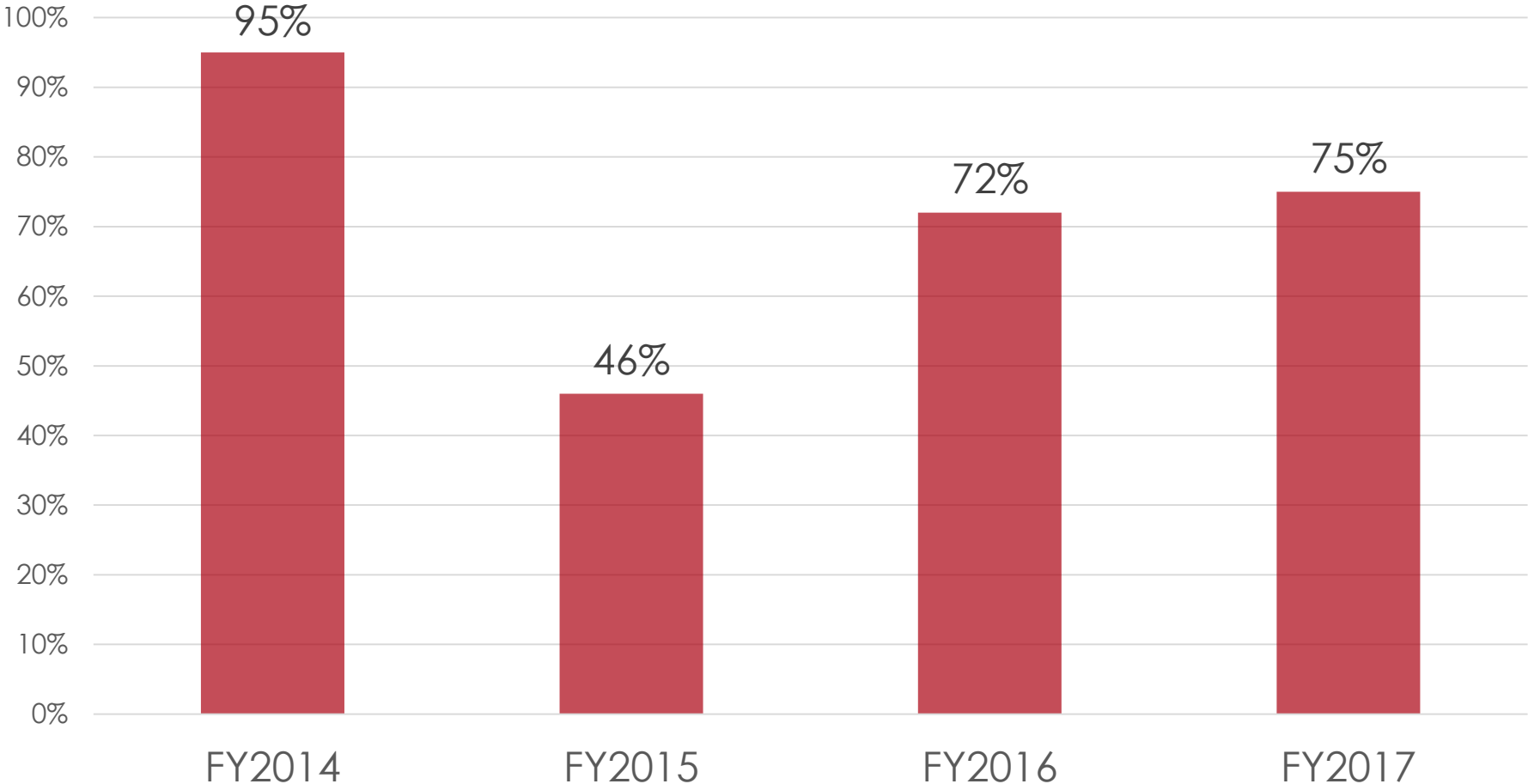
Shopping Malls/ Stores (Top Responses)

FY2014	FY2015	FY2016	FY2017
89% DFS 80% ABC 71% Macys	90% DFS 73% ABC 66% K-Mart	89% DFS 77% ABC 68% K-Mart	80% ABC 74% DFS 61% Macys

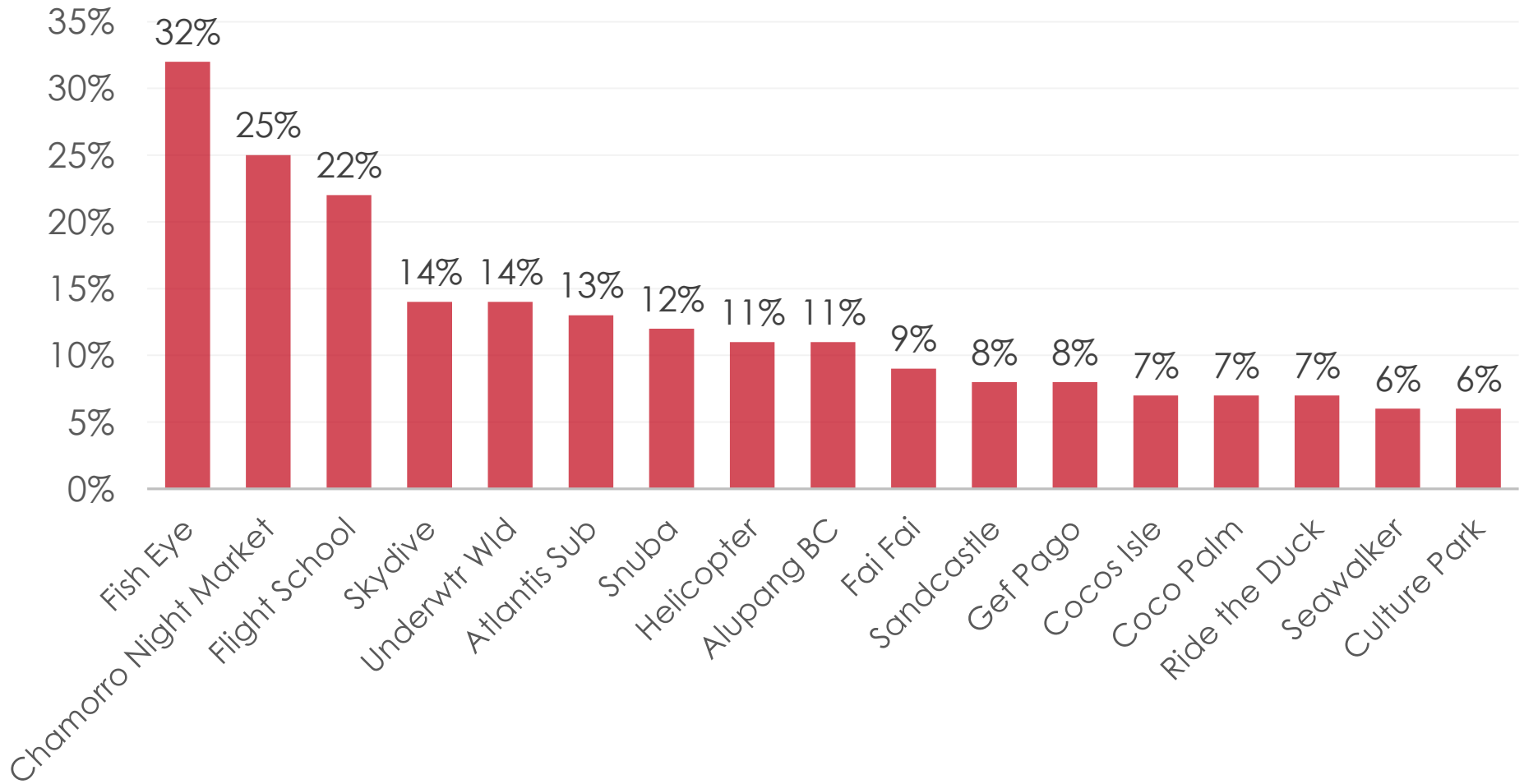
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – Tracking

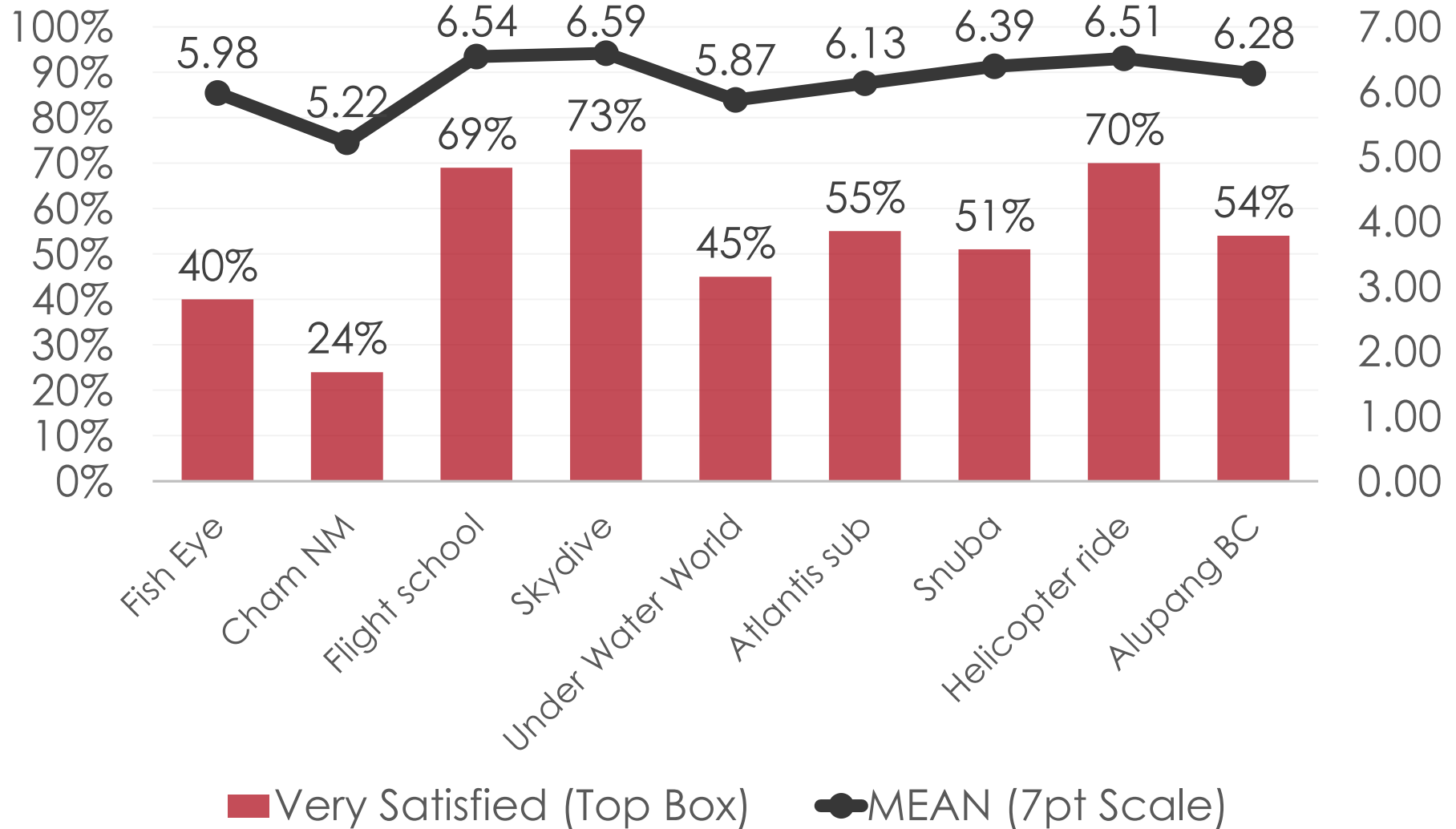


Optional Tour Participation (Top Responses) FY2017

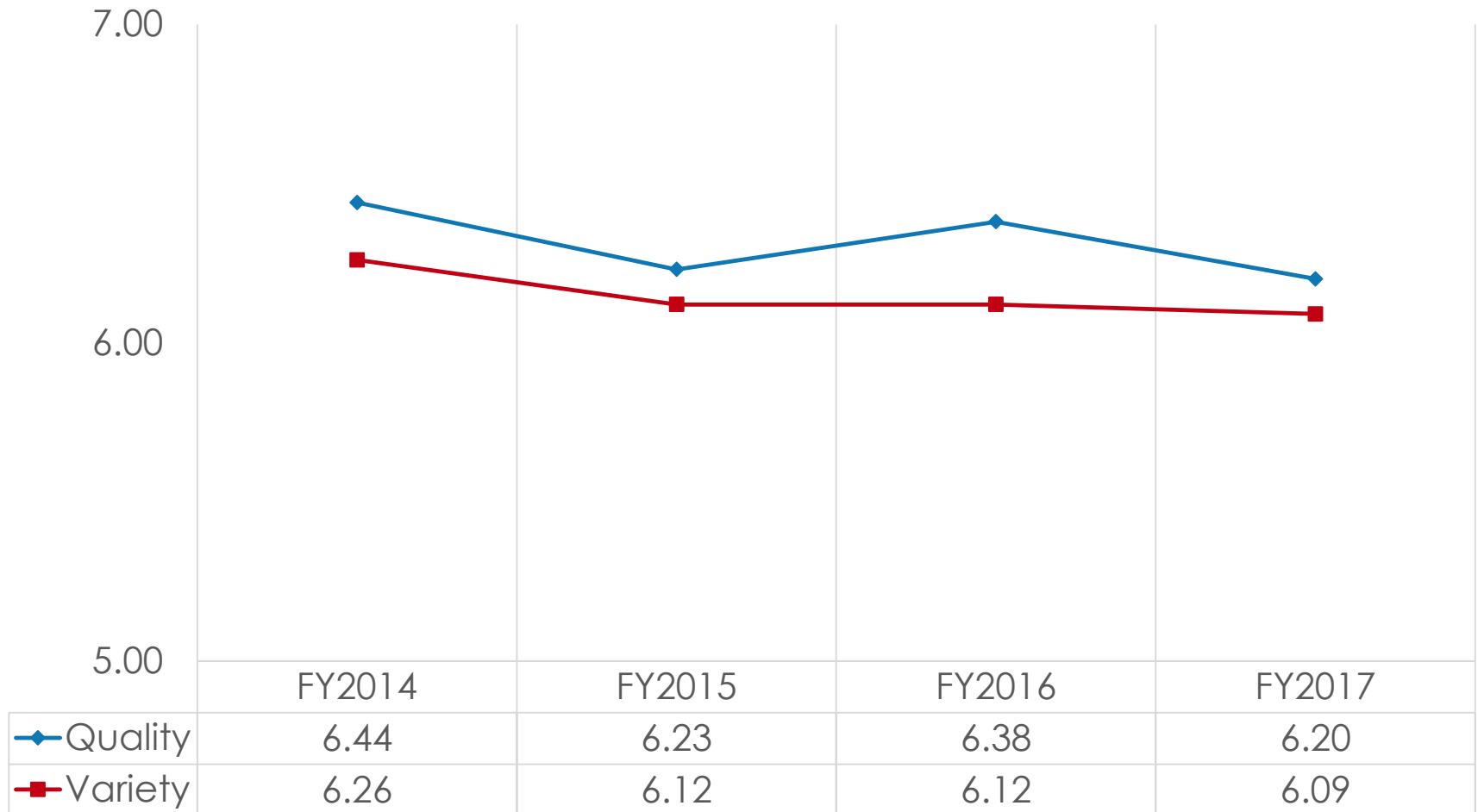


Optional Tour Satisfaction

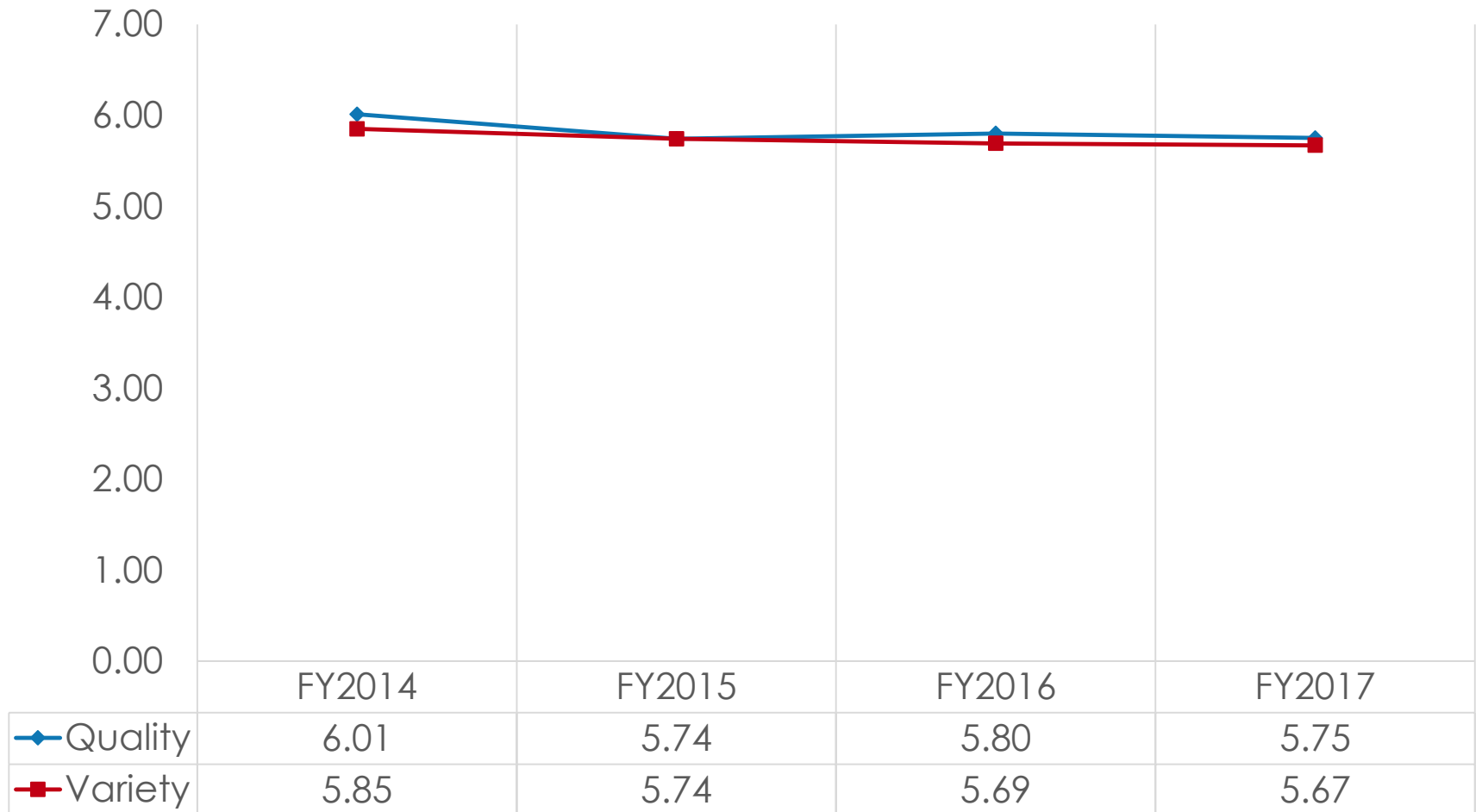
Top Responses only - Participation (10%+)



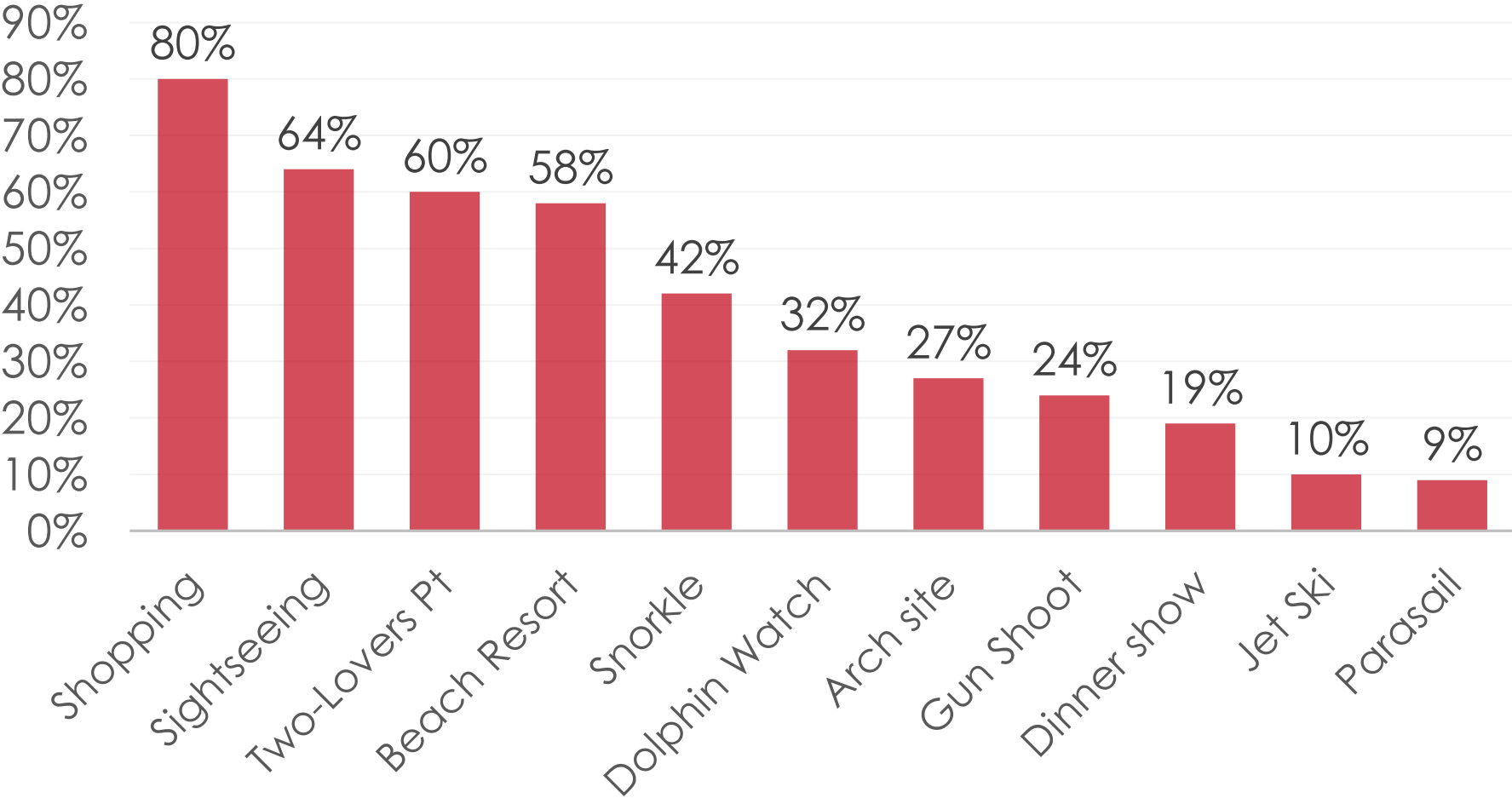
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

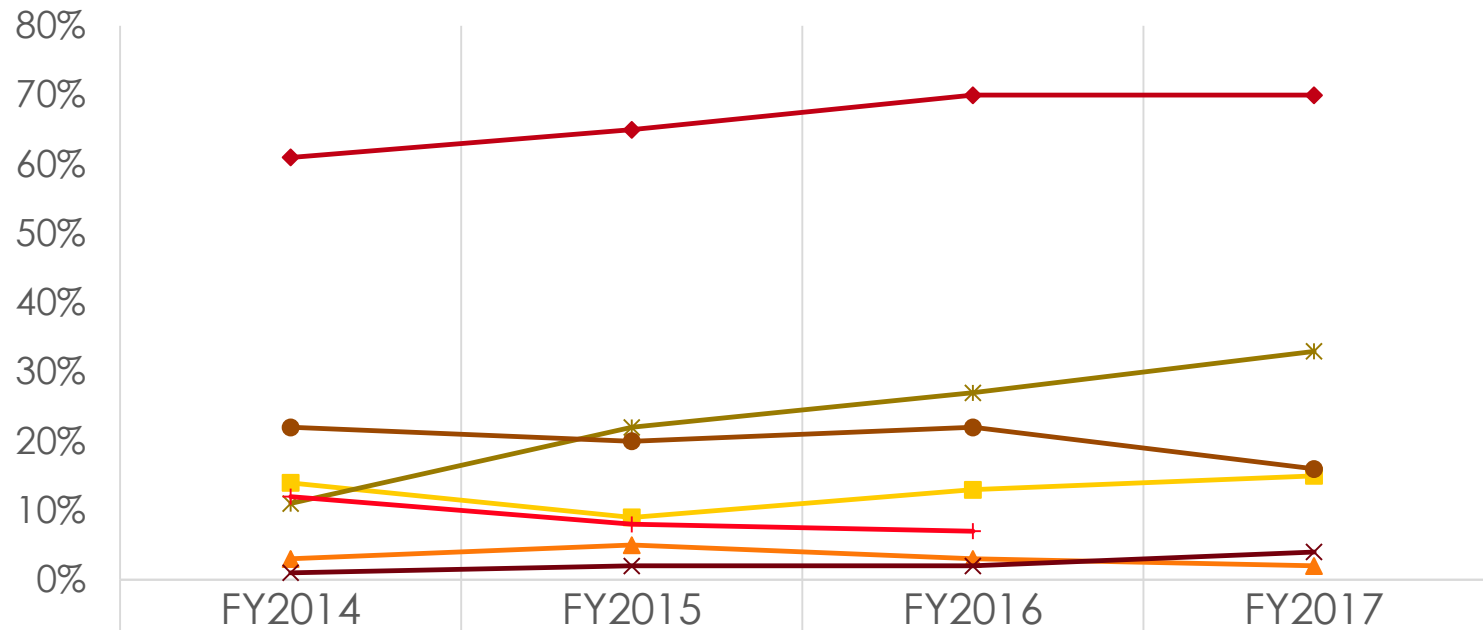


Activities Participation (Top Responses)



SECTION 5 PROMOTIONS

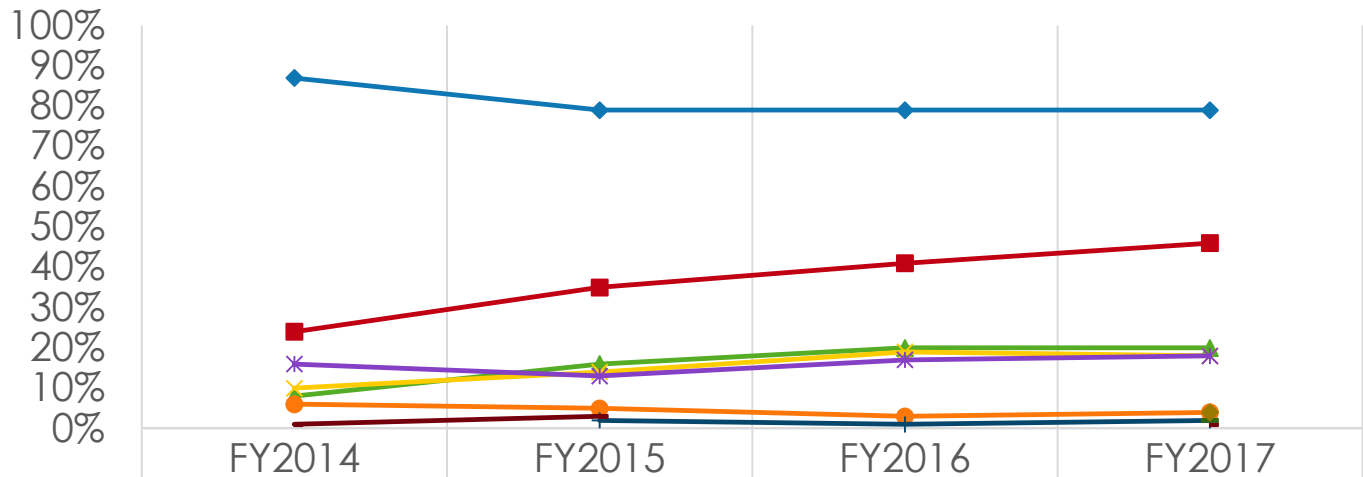
INTERNET- GUAM SOURCES OF INFORMATION



◆ Search Engines	61%	65%	70%	70%
■ Blogs	14%	9%	13%	15%
▲ None	3%	5%	3%	2%
✕ Q&A sites	1%	2%	2%	4%
* Social network	11%	22%	27%	33%
● Forums	22%	20%	22%	16%
+ Other	12%	8%	7%	

INTERNET- SOURCES OF INFORMATION

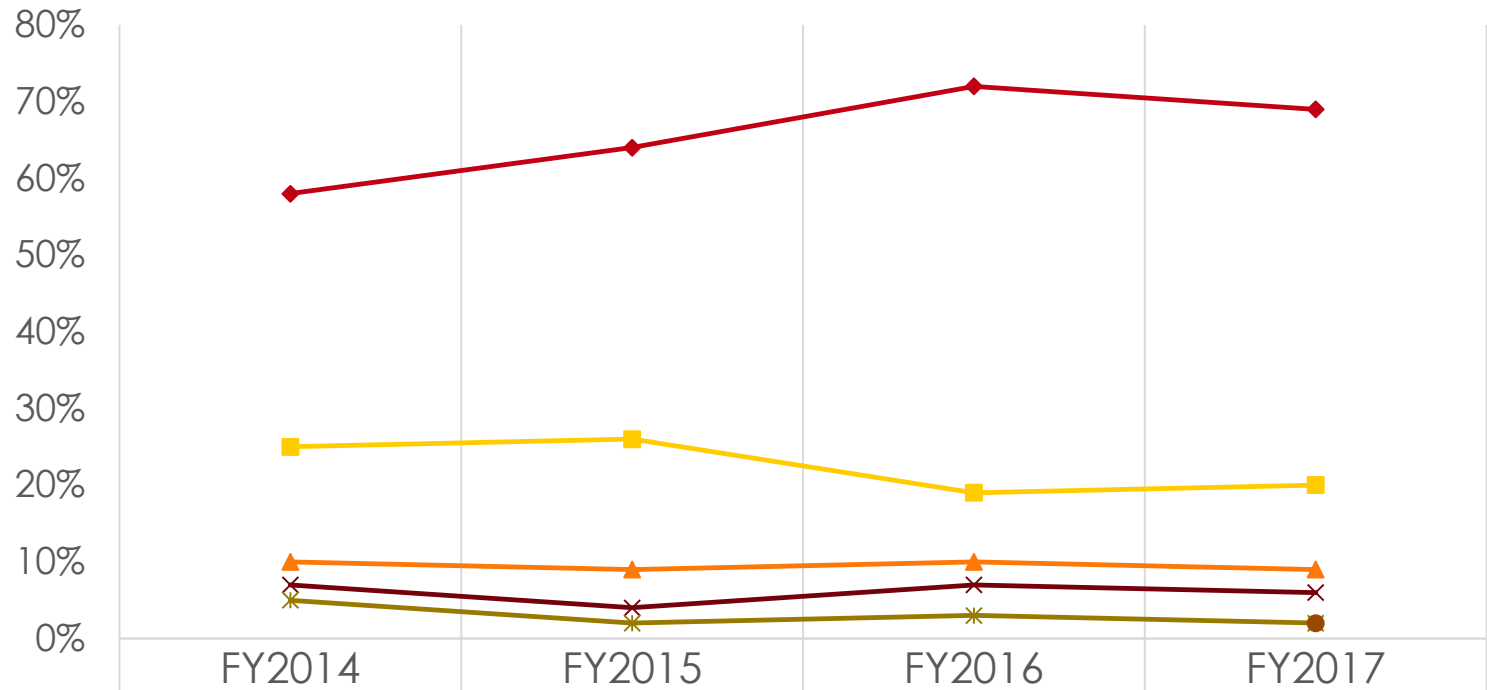
Things to do on Guam



◆ Baidu	87%	79%	79%	79%
■ Online booking website	24%	35%	41%	46%
▲ WeChat	8%	16%	20%	20%
✕ Google	10%	14%	19%	18%
* Weibo	16%	13%	17%	18%
● Online portal	6%	5%	3%	4%
+ Yahoo		2%	1%	2%
— None	1%	3%		1%
— Instagram				2%
◆ Mafengwo				4%

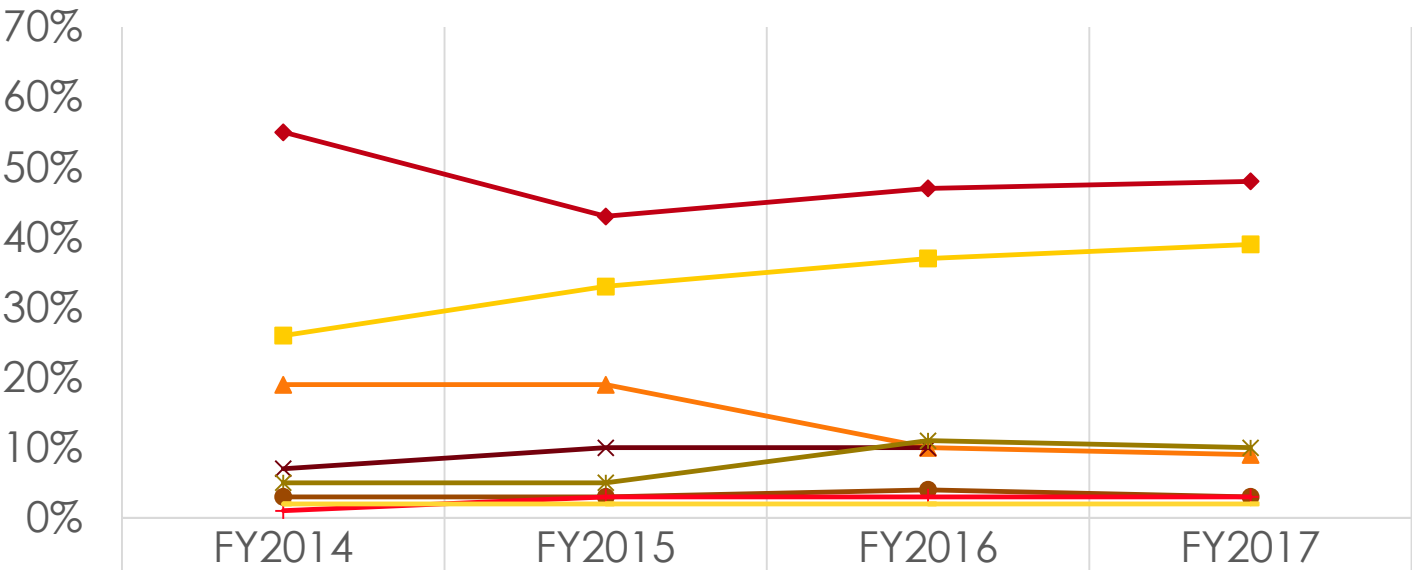
INTERNET- SOURCES OF INFORMATION

GVB



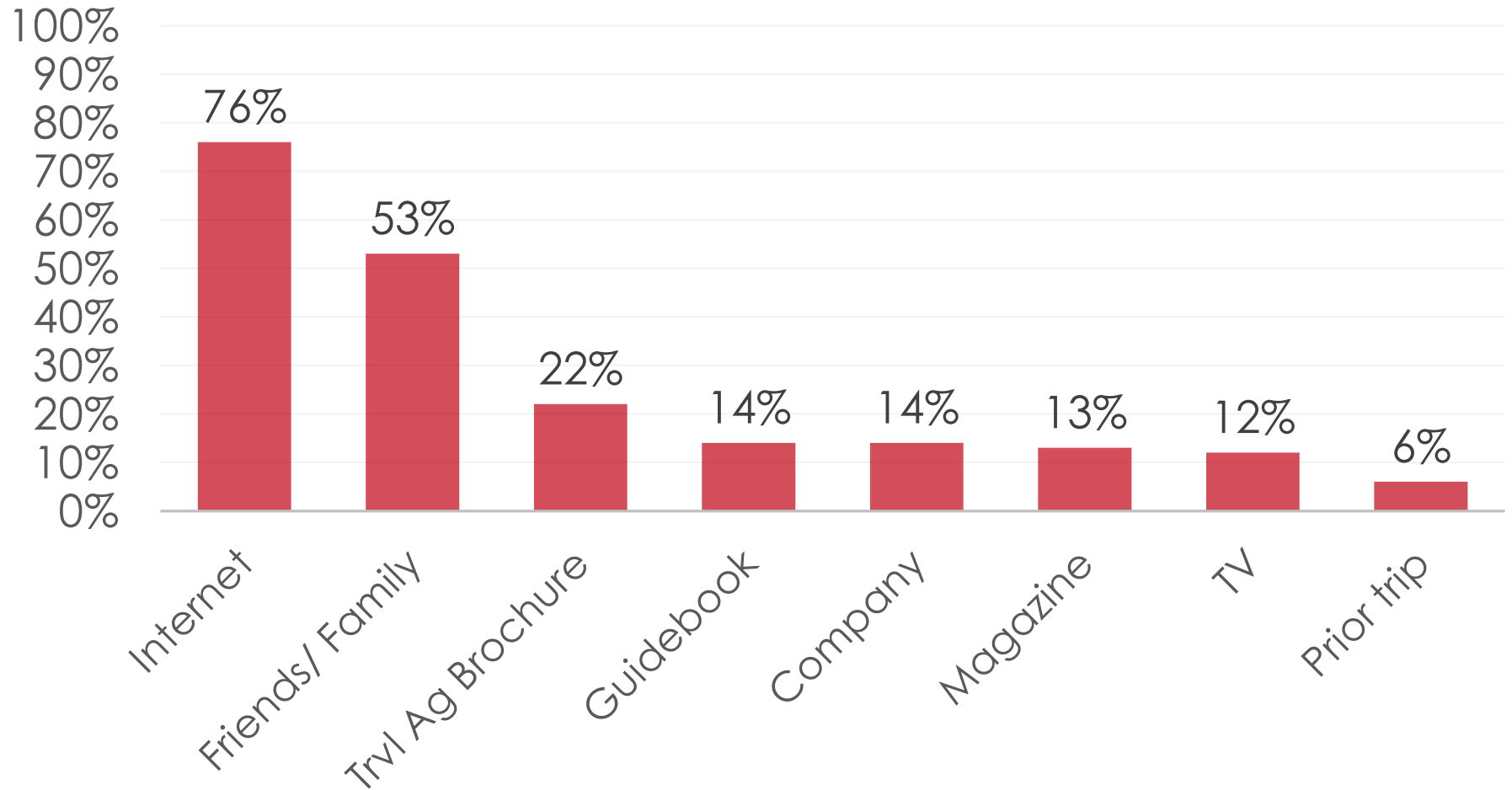
◆ None	58%	64%	72%	69%
■ GVB Website	25%	26%	19%	20%
▲ GVB Weibo	10%	9%	10%	9%
✕ GVB WeChat	7%	4%	7%	6%
* GVB Blog	5%	2%	3%	2%
● GVB Instagram				2%

TRAVEL MOTIVATION



	FY2014	FY2015	FY2016	FY2017
Friends/ Family	55%	43%	47%	48%
Internet	26%	33%	37%	39%
Travel Agent	19%	19%	10%	9%
Other	7%	10%	10%	
Social media	5%	5%	11%	10%
Company/ Bus Trip	3%	3%	4%	3%
Magazine	1%	3%	3%	3%
Travel shows	2%	2%	2%	2%

PRE-ARRIVAL SOURCES OF INFORMATION

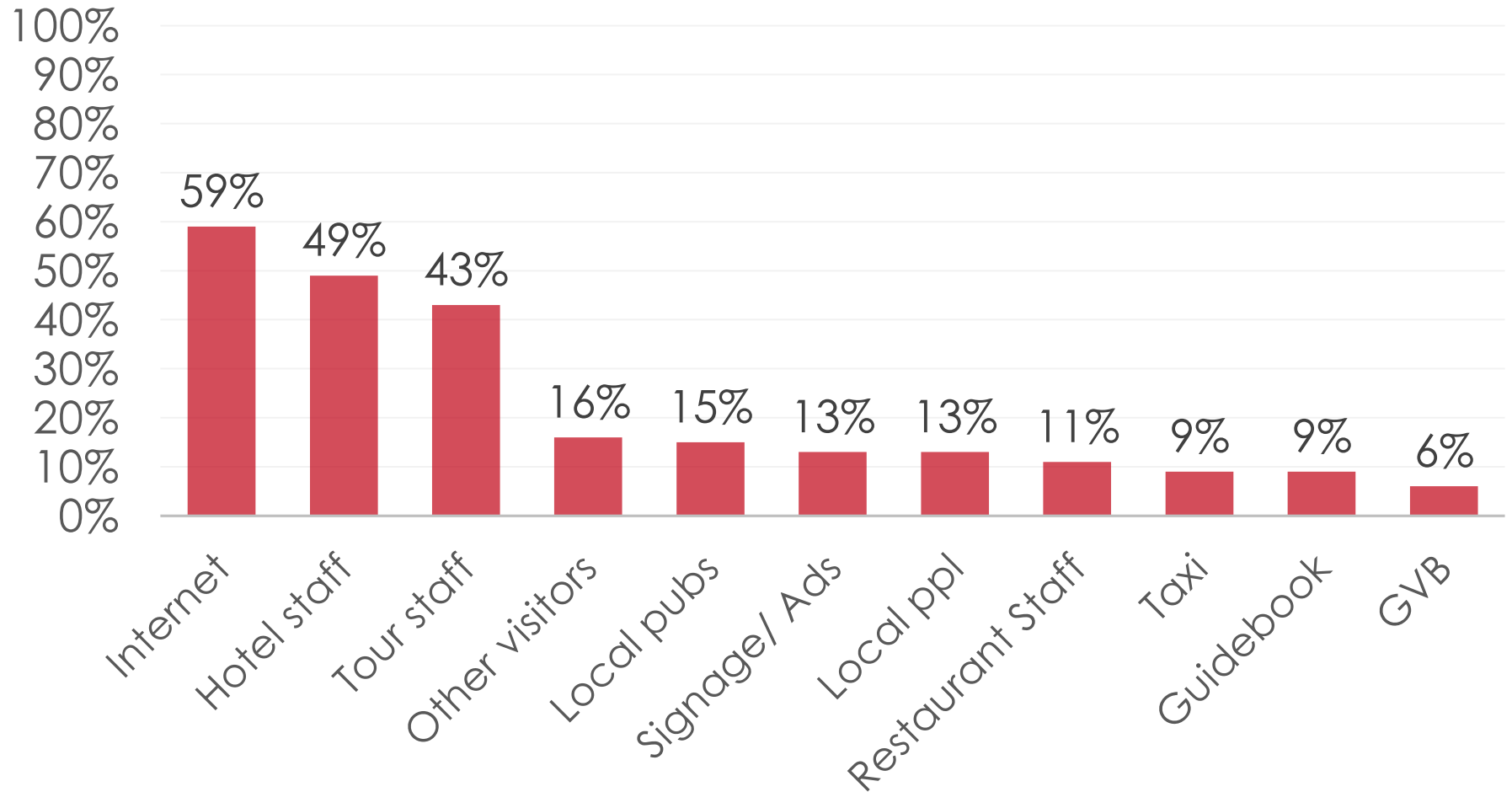


PRE-ARRIVAL SOURCES OF INFORMATION

FY2014	FY2015	FY2016	FY2017
56% Internet 13% Travel Agent Broch 11% Recommend	61% Internet 16% Recommend 7% Travel Agent Broch	71% Internet 13% Recommend	76% Internet/ App 53% Recommend 22% Travel Agent Broch

ONISLE

SOURCES OF INFORMATION



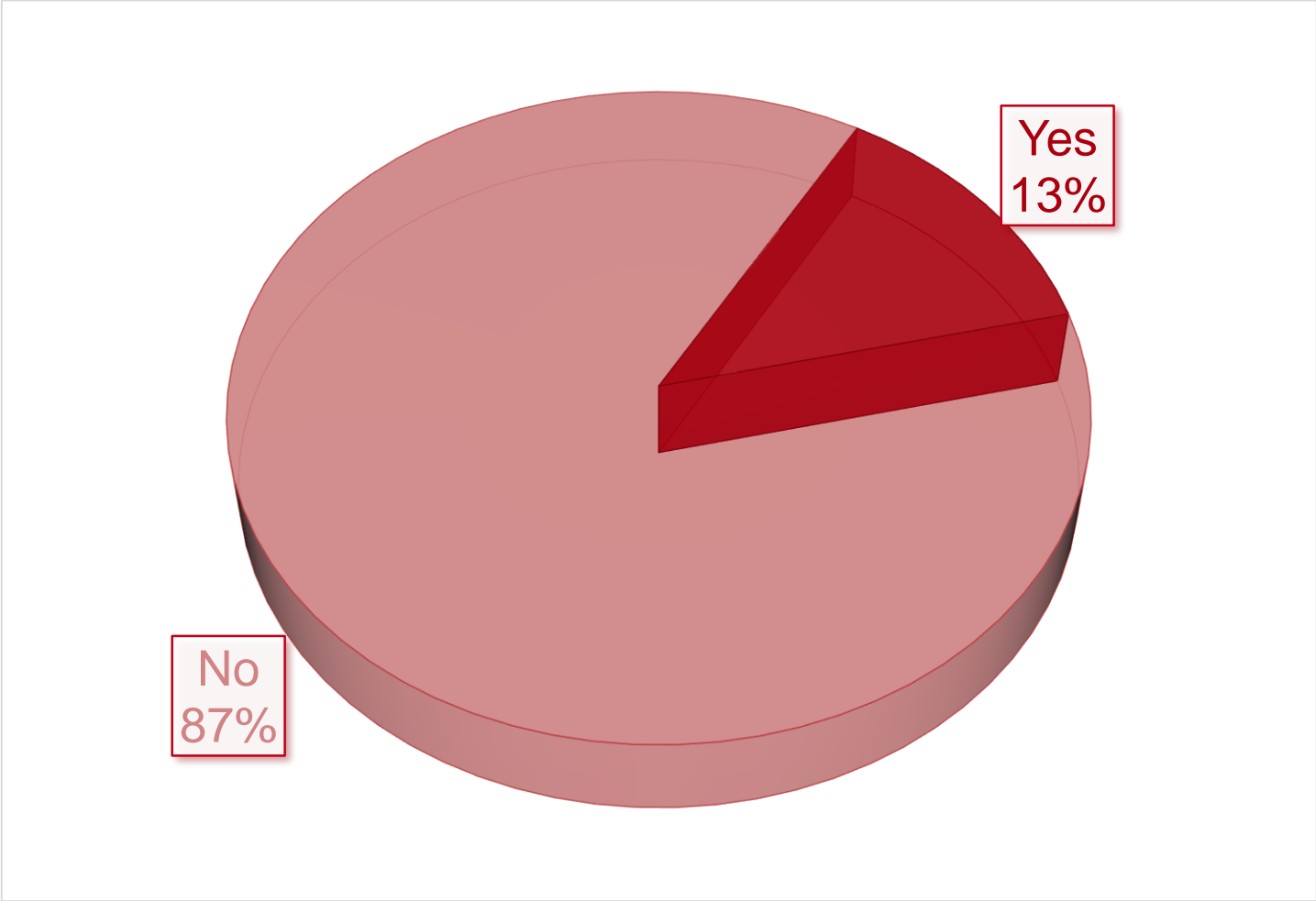
ON-ISLE SOURCES OF INFORMATION

FY2014	FY2015	FY2016	FY2017
48% Tour staff 23% Internet 9% Hotel staff	34% Internet 33% Tour staff 12% Hotel staff	41% Internet 20% Tour staff 17% Hotel staff	59% Internet/ App 49% Hotel staff 43% Tour staff

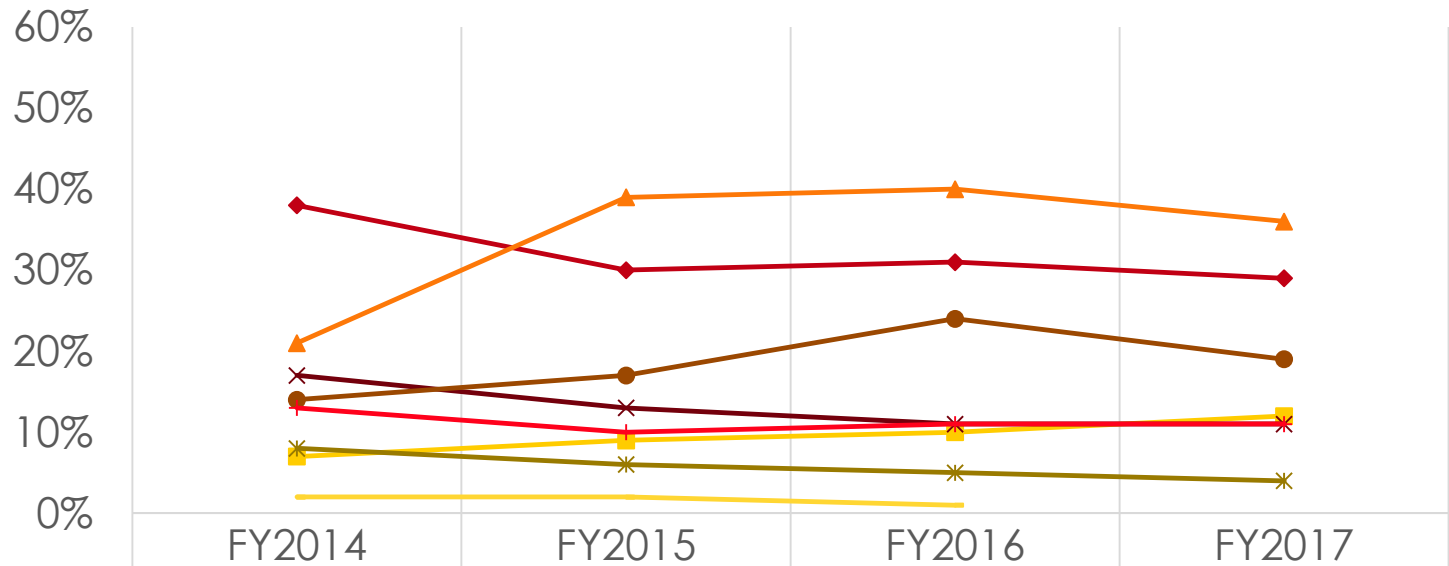
SECTION 6

FUTURE TRAVEL TO GUAM

Will security screening/ immigration at Guam Airport impact future travel to Guam?

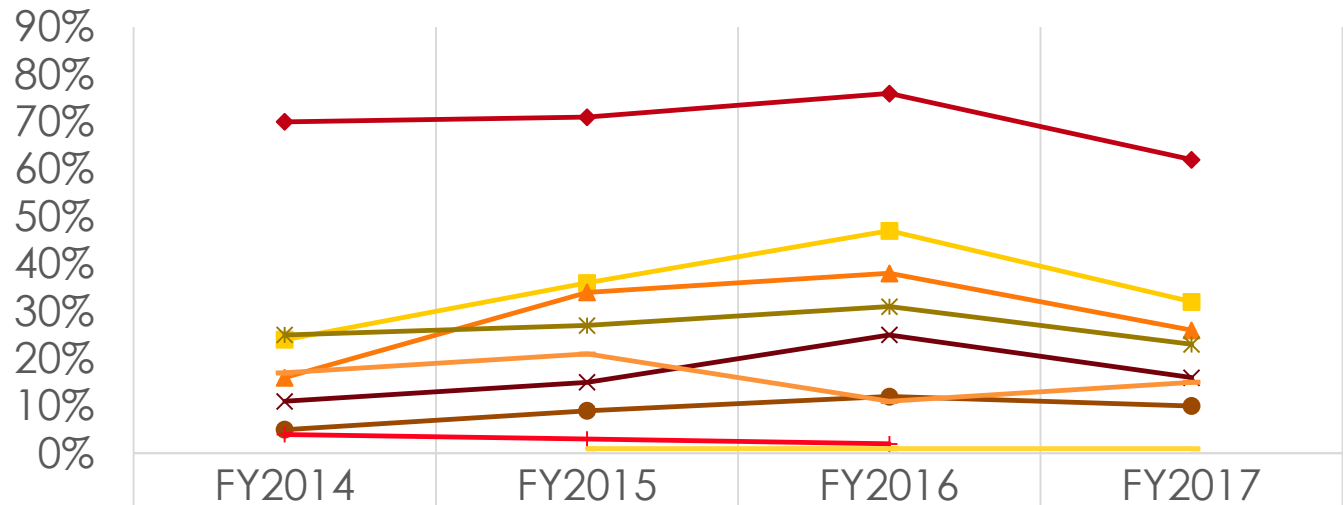


What would it take to make you stay an extra day on Guam?



◆ More time	38%	30%	31%	29%
■ Budget/ money	7%	9%	10%	12%
▲ Nothing	21%	39%	40%	36%
✕ Things to do	17%	13%	11%	11%
* Less restrictions	8%	6%	5%	4%
● Flight Schedule	14%	17%	24%	19%
+ Pkgs- longer stays	13%	10%	11%	11%
— Other	2%	2%	1%	

FUTURE TRAVEL CONCERNS

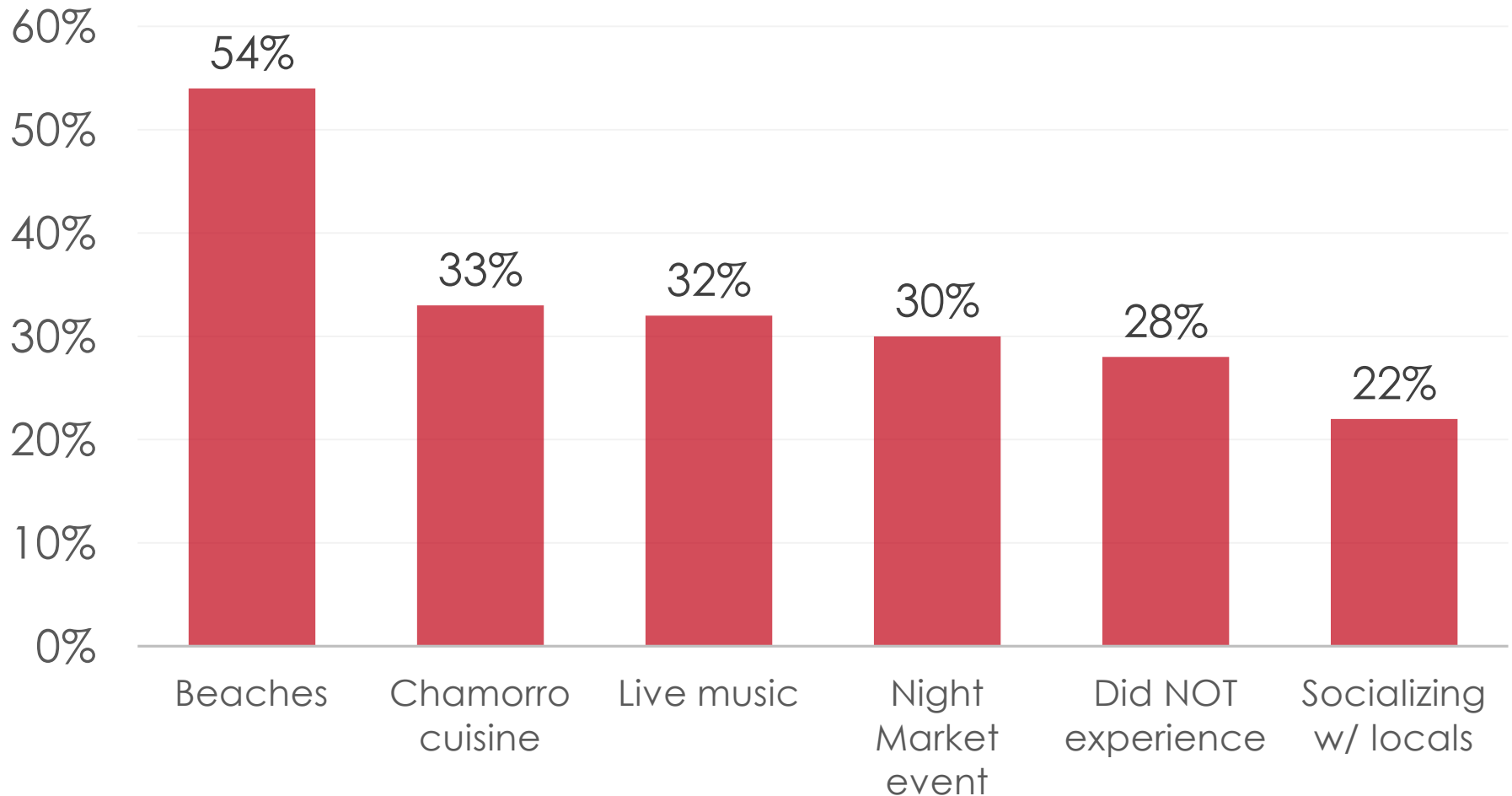


◆ Safety	70%	71%	76%	62%
■ Terrorism	24%	36%	47%	32%
▲ Food	16%	34%	38%	26%
✕ Expense	11%	15%	25%	16%
* Discrimination	25%	27%	31%	23%
● Should spend at home	5%	9%	12%	10%
+ Other	4%	3%	2%	
— Don't know		1%	1%	1%
— No concerns	17%	21%	11%	15%

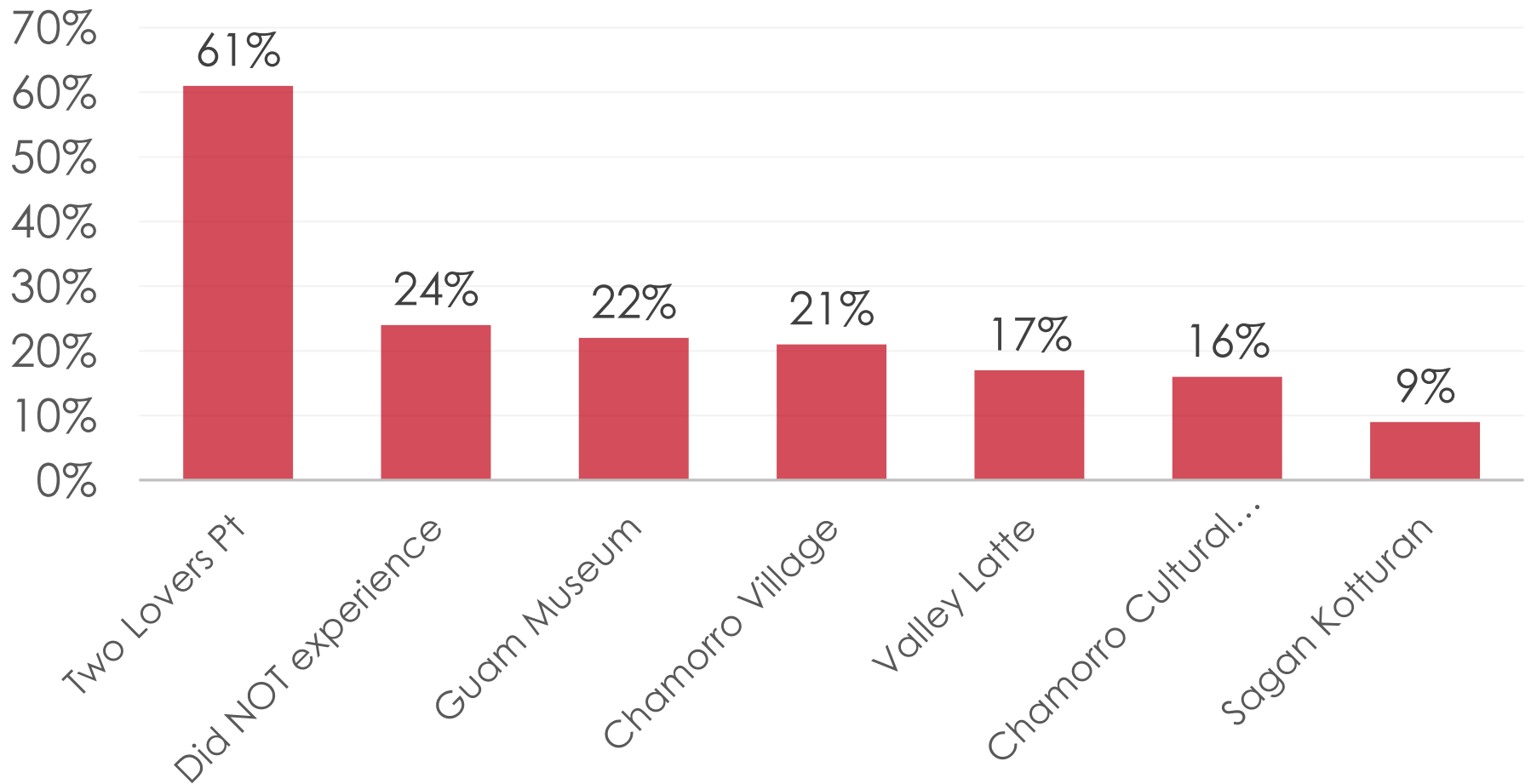
SECTION 7

GUAM CULTURE

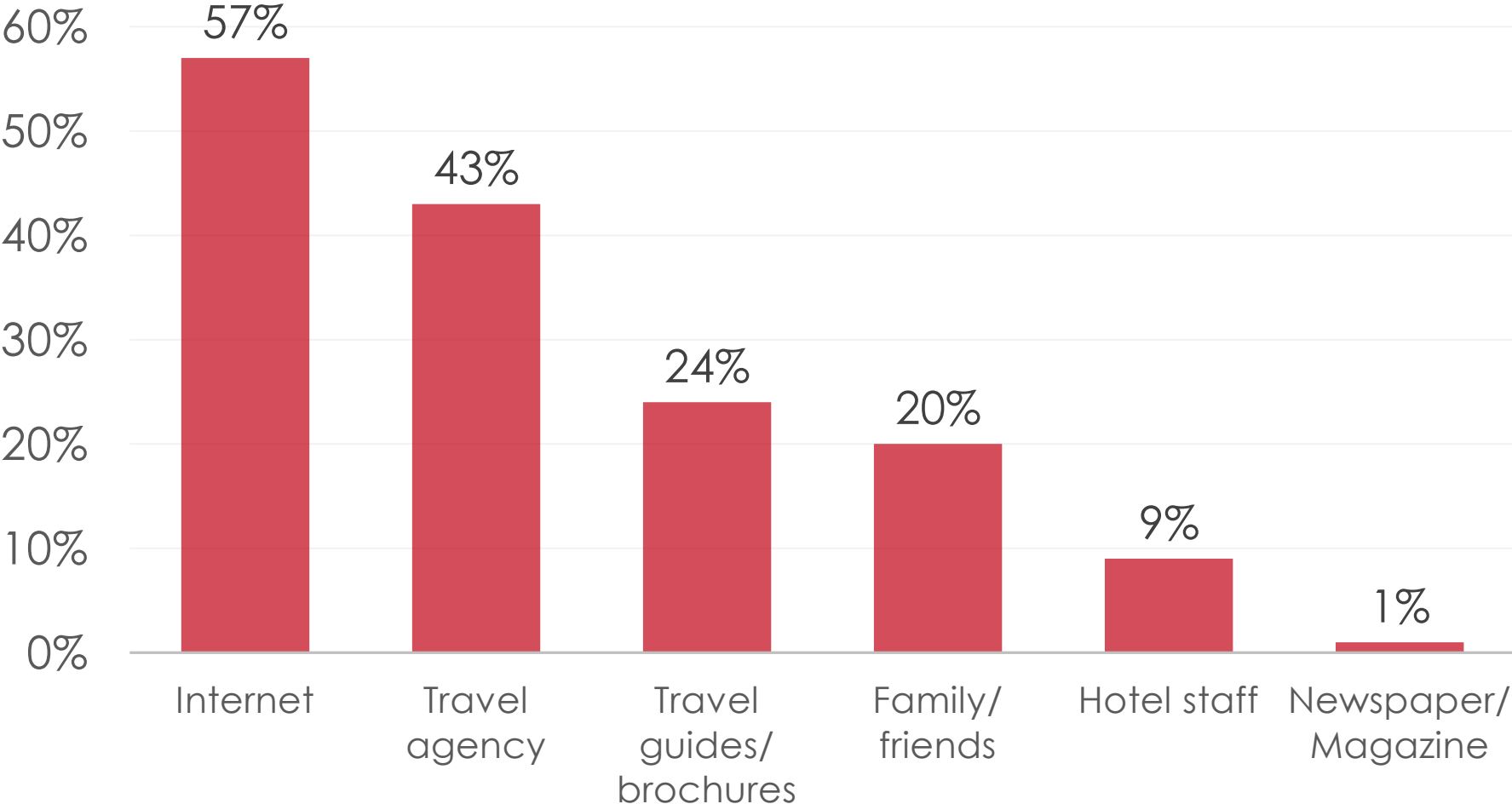
EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT



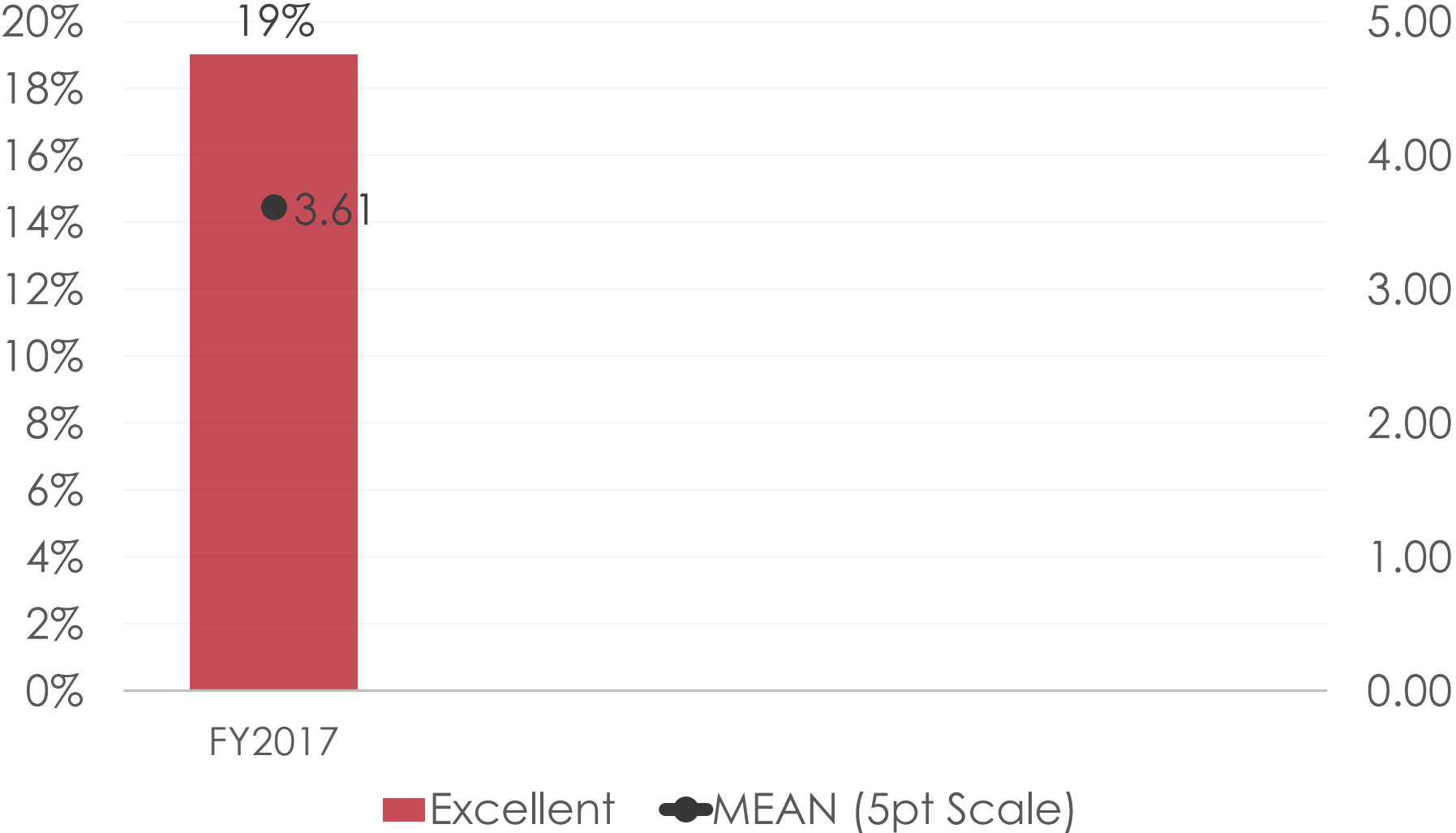
EXPERIENCED - OTHER CULTURAL ACTIVITY/EVENTS



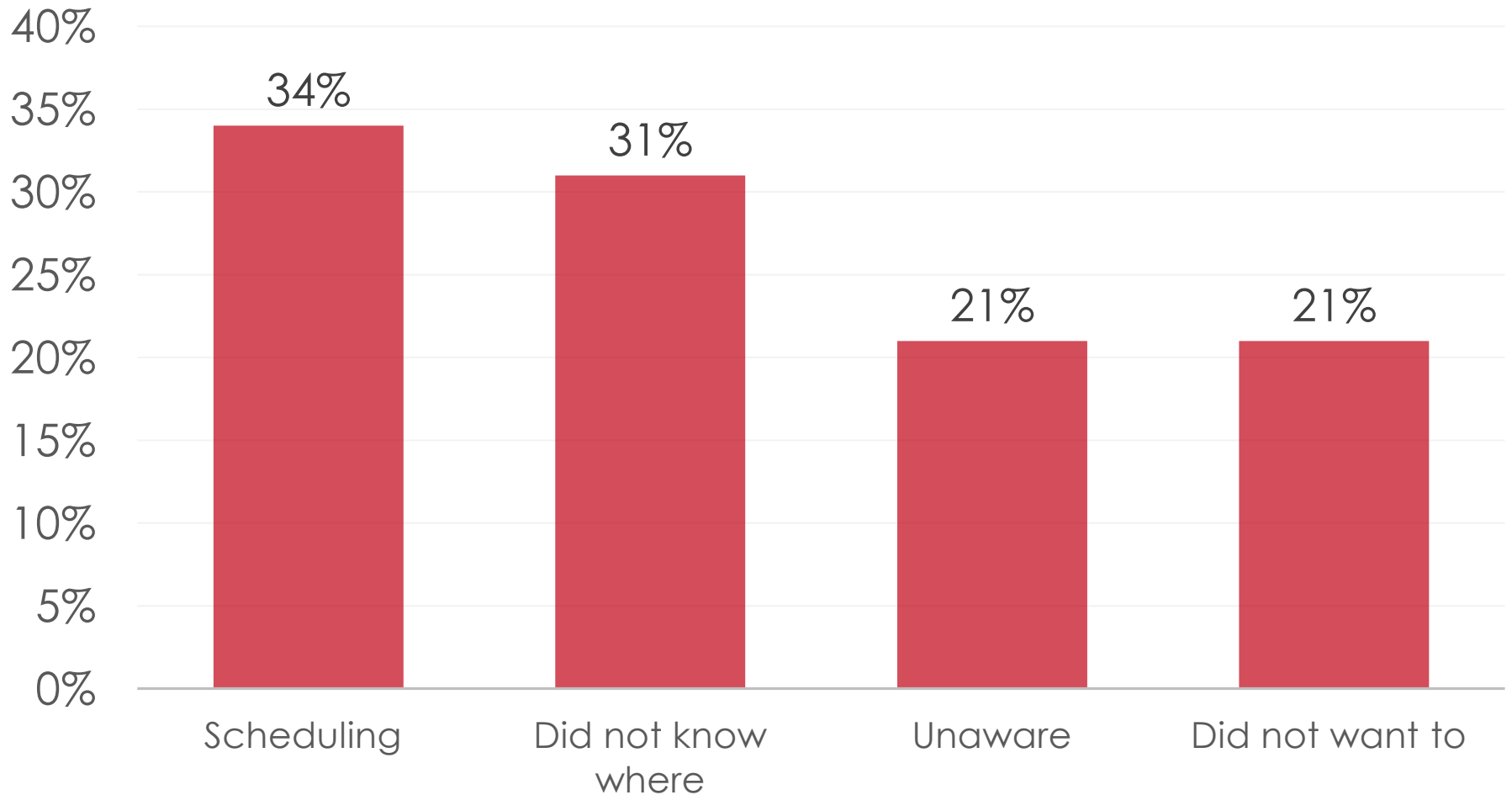
SOURCES OF INFORMATION - CULTURAL ACTIVITY/EVENTS



SATISFACTION - CULTURAL ACTIVITY/EVENTS



OBSTACLES - CULTURAL ACTIVITY/EVENTS



ADVANCED STATISTICS

Analysis Technique

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ($p \leq .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Drivers of Overall Satisfaction

Comparison of Drivers of Overall Satisfaction, Annual 2017	
	Combined Annual 2017 rank
Drivers:	
Quality & Cleanliness of beaches & parks	
Ease of getting around	4
Safety walking around at night	6
Quality of daytime tours	1
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	
Variety of shopping	
Price of things on Guam	2
Quality of hotel accommodations	5
Quality/cleanliness of air, sky	3
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	53.9%
NOTE: Only significant predictors are ranked.	

Drivers of Overall Satisfaction

- **Overall satisfaction** with the China visitor's experience on Guam is driven by six significant factors in the 2017 Period. By rank order they are:
 - **Quality of day time tours,**
 - **Price of things on Guam,**
 - **Quality/cleanliness of air, sky,**
 - **Ease of getting around,**
 - **Quality of hotel accommodations, and**
 - **Safety walking around at night.**
- With all six factors the overall r^2 is .539 meaning that **53.9% of overall satisfaction is accounted for by these factors.**

Drivers of On-isle Expenditures

Comparison of Drivers of Per Person On Island Expenditure, Annual 2017	
Drivers:	Combined Overall 2017 rank
Quality & Cleanliness of beaches & parks	
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	
Variety of shopping	
Price of things on Guam	1
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	1.3%

NOTE: Only significant predictors are ranked.

Drivers of On-Isle Expenditures

- **Per Person On-Isle Expenditures** of China visitor's on Guam is driven by one significant factor in the 2017 Period. It is:
 - **Price of things on Guam.**
- With this factor, the overall r^2 is .013 meaning that **1.3% of per person on island expenditure is accounted for by this factor.**