



GUAM VISITORS BUREAU

Hong Kong Visitor Tracker Exit Profile

FY2012 Data Aggregation



Prepared by: QMark Research

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Background & Methodology

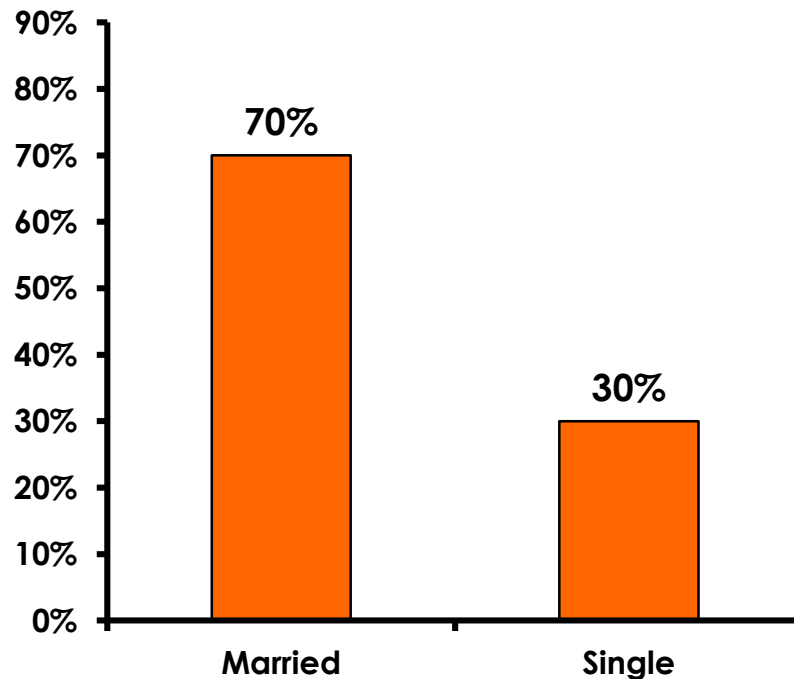
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Chinese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **601** departing Hong Kong 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 **601** is +/- 4.00 percentage points with a 95% confidence level. That is, if all Hong Kong 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 +/- 4.00 percentage points.

OBJECTIVES

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

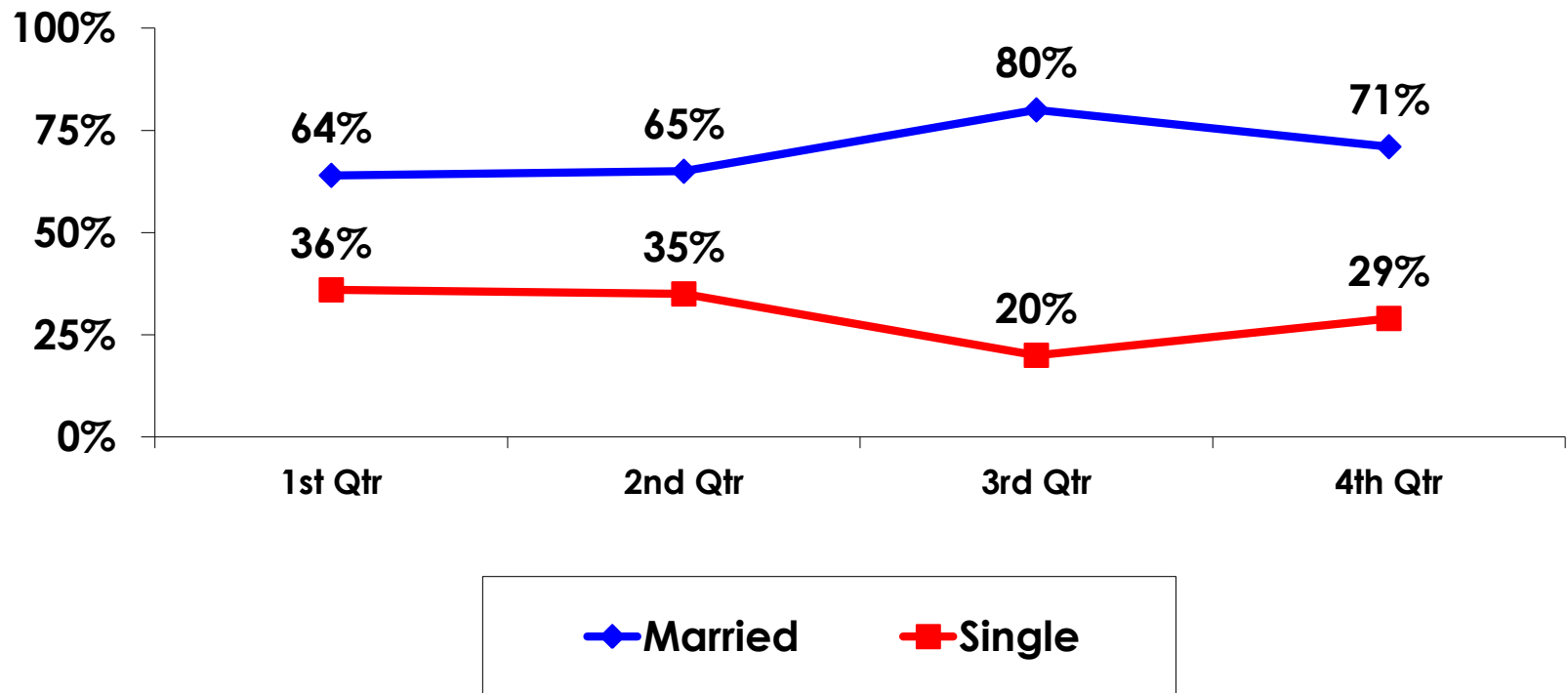
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

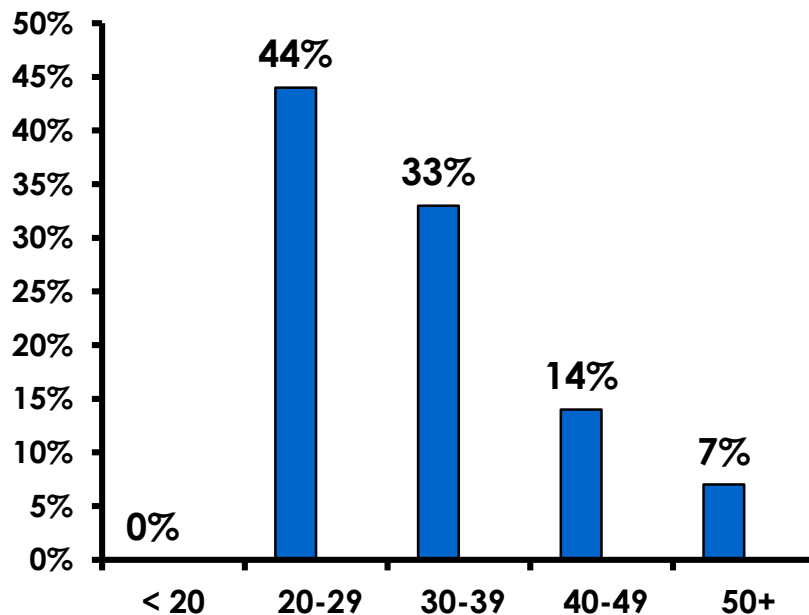


- A majority of visitors are married.

MARITAL STATUS

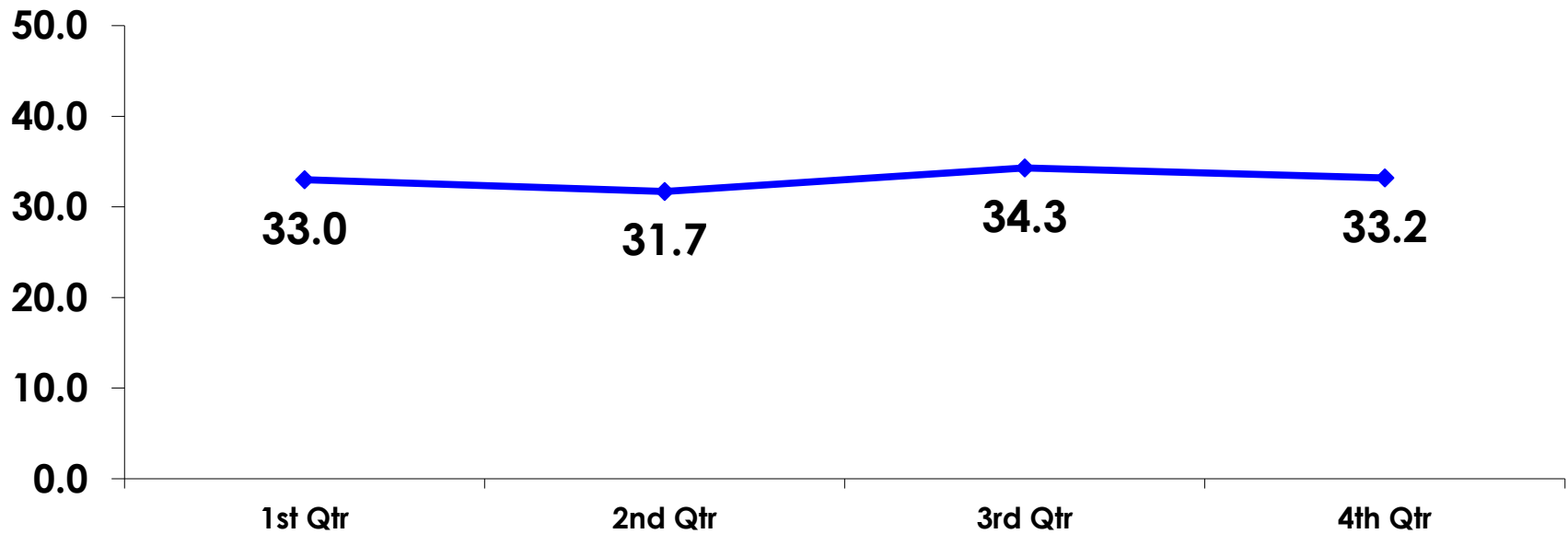


Age - Overall

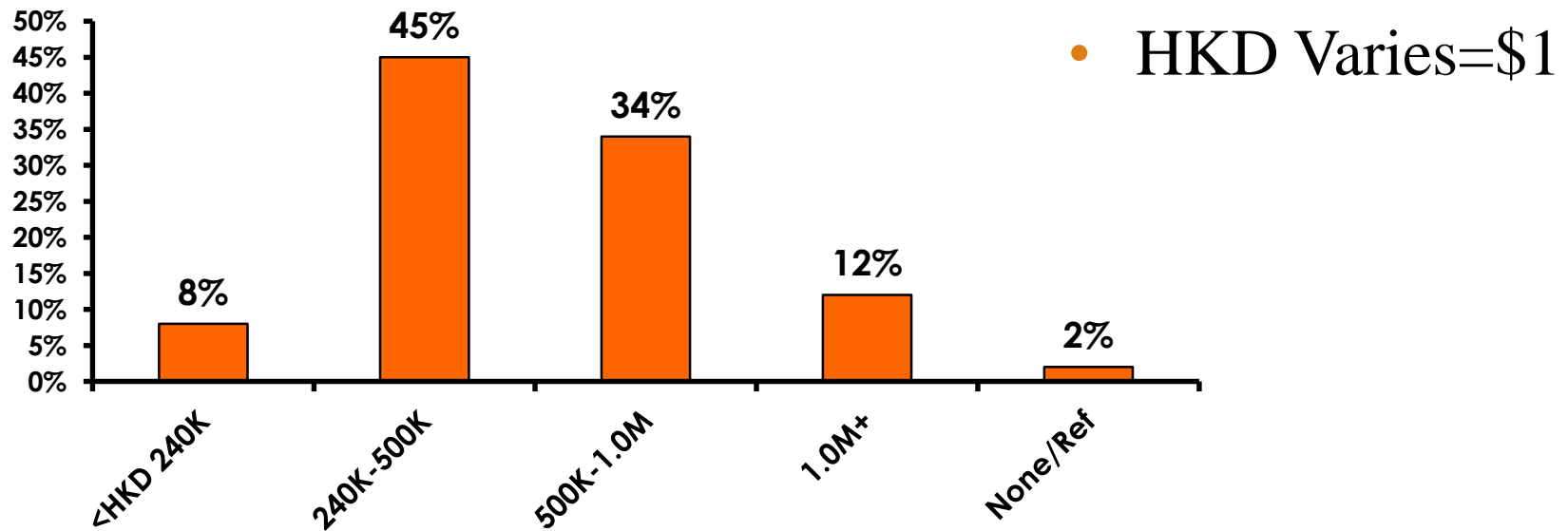


- The average age of the respondents is 33.0 years of age.

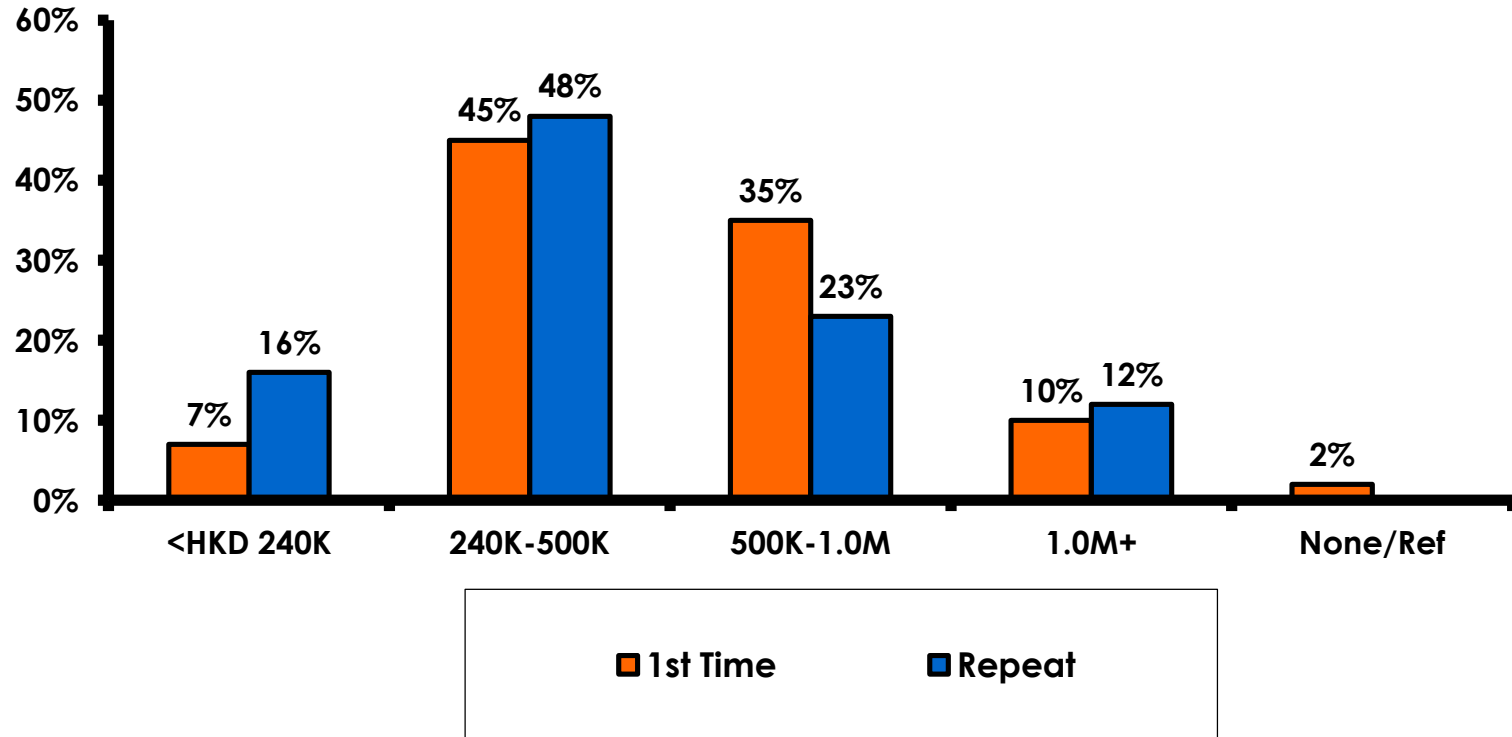
AVERAGE - AGE



Personal Income



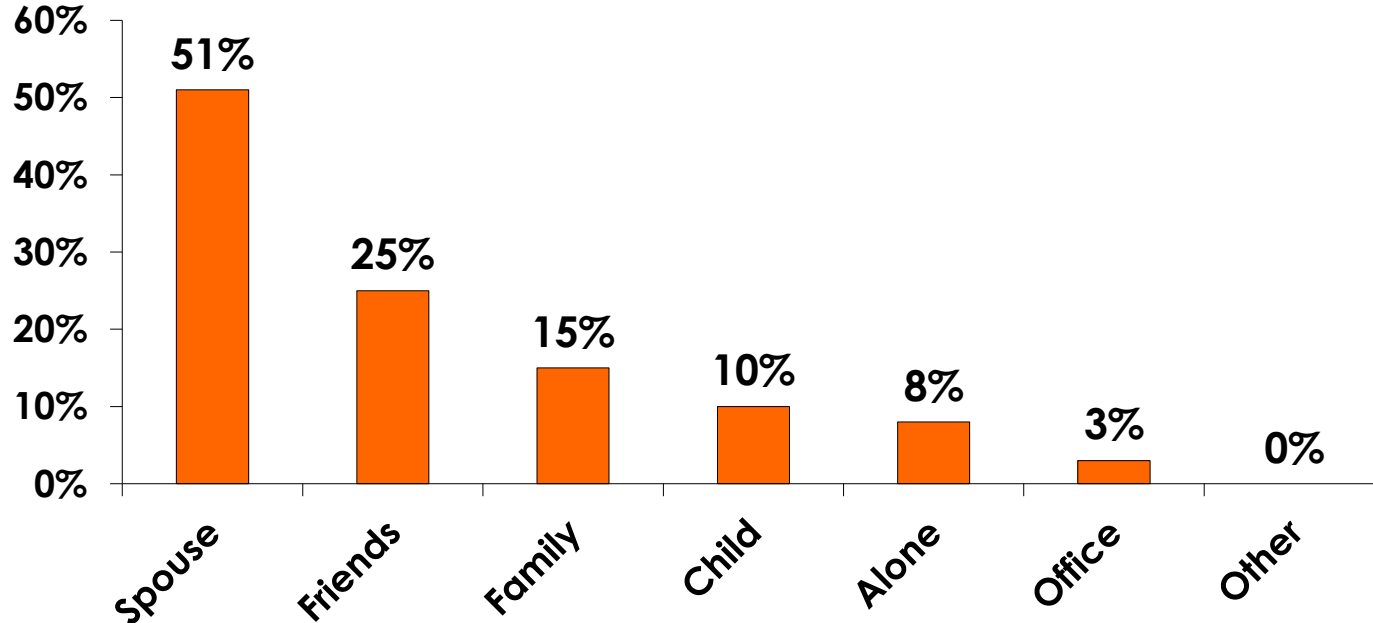
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE				
				Male	Female	<20	20-29	30-39	40-49	50+
PERSONAL INCOME	<240K	Count	25	17	8		17	3	2	3
			8%	9%	6%		13%	3%	5%	16%
	240K-1.0M	Count	250	140	110		106	95	32	12
			80%	78%	82%		80%	86%	73%	63%
	1.0M-3.0M	Count	29	18	11		7	11	7	3
			9%	10%	8%		5%	10%	16%	16%
	3.0M+	Count	5	3	2		2	2	1	
			2%	2%	1%		2%	2%	2%	
	Refused	Count	5	2	3	1	1		2	1
			2%	1%	2%	100%	1%		5%	5%
Total	Count		314	180	134	1	133	111	44	19

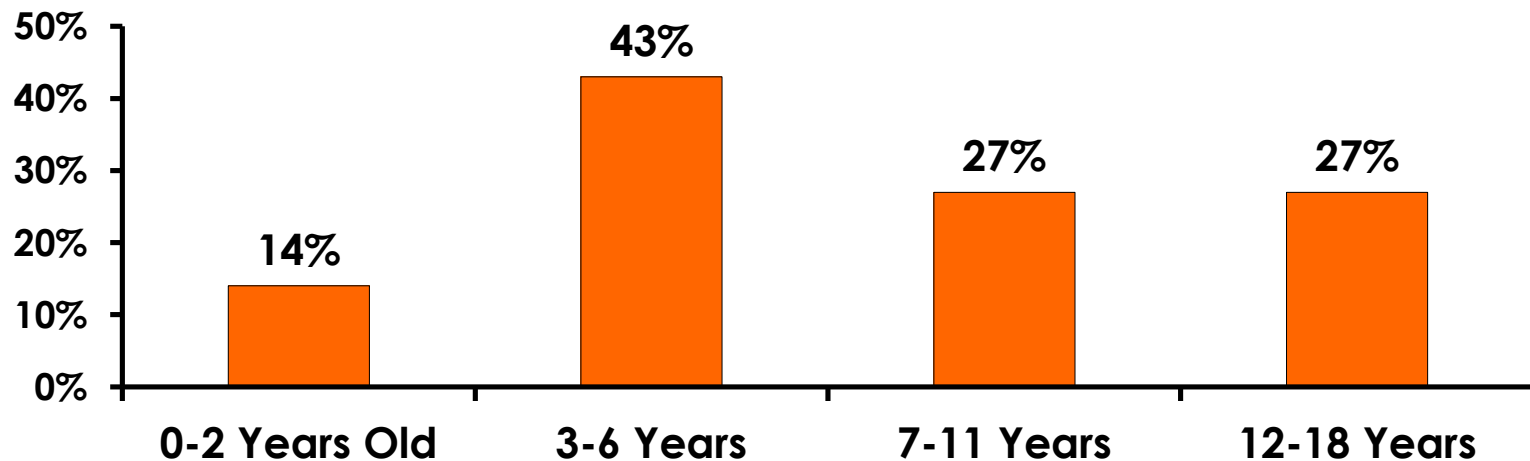
Travel Companions



Number of Children Travel Party

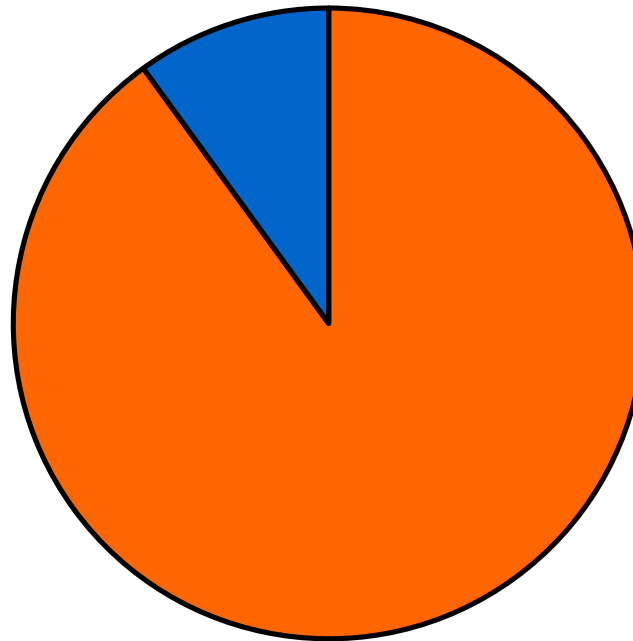
N=56 total respondents traveling with children.

(Of those N=56 respondents, there is a total of 67 children 18 years or younger)



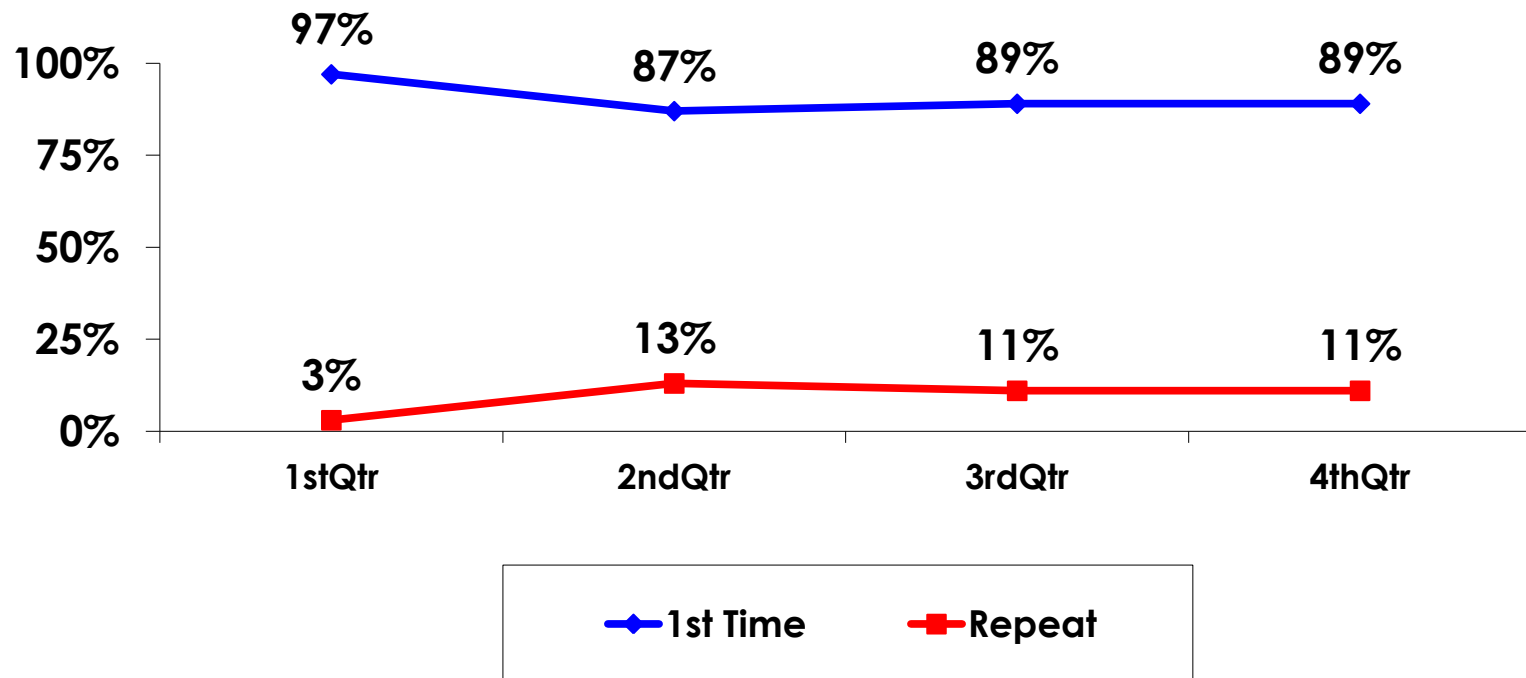
Prior Trips to Guam

Repeat
visitor
10%



First trip
90%

PRIOR TRIPS TO GUAM



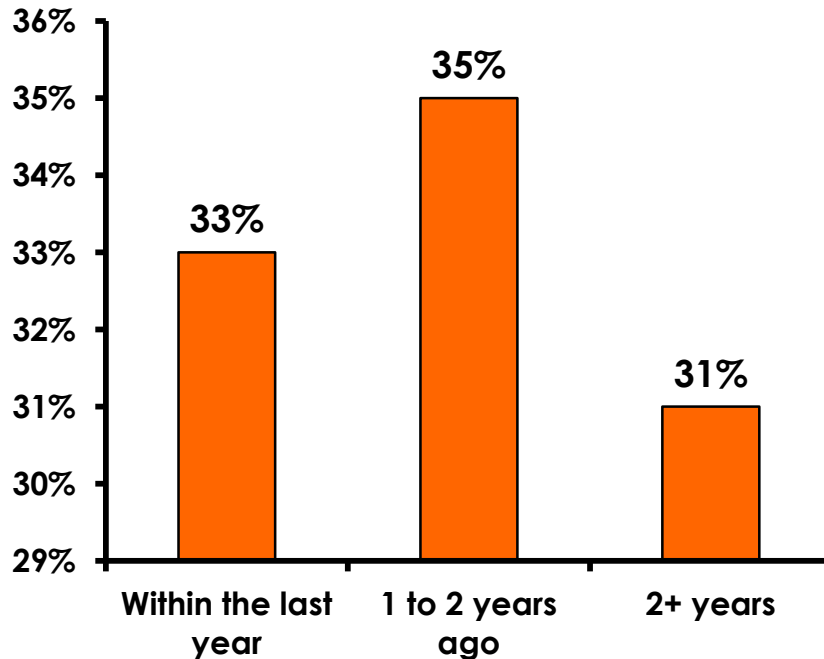
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	350	314	36
			58%	58%	62%
	Female	Count	251	227	22
			42%	42%	38%
Total		Count	601	541	58
AGE	<20	Count	1	1	
			0%	0%	
	20-29	Count	261	241	19
			44%	46%	33%
	30-39	Count	196	185	10
			33%	35%	18%
	40-49	Count	85	71	14
			14%	13%	25%
	50+	Count	44	30	14
			7%	6%	25%
Total		Count	587	528	57

- Repeat visitors tend to be older.

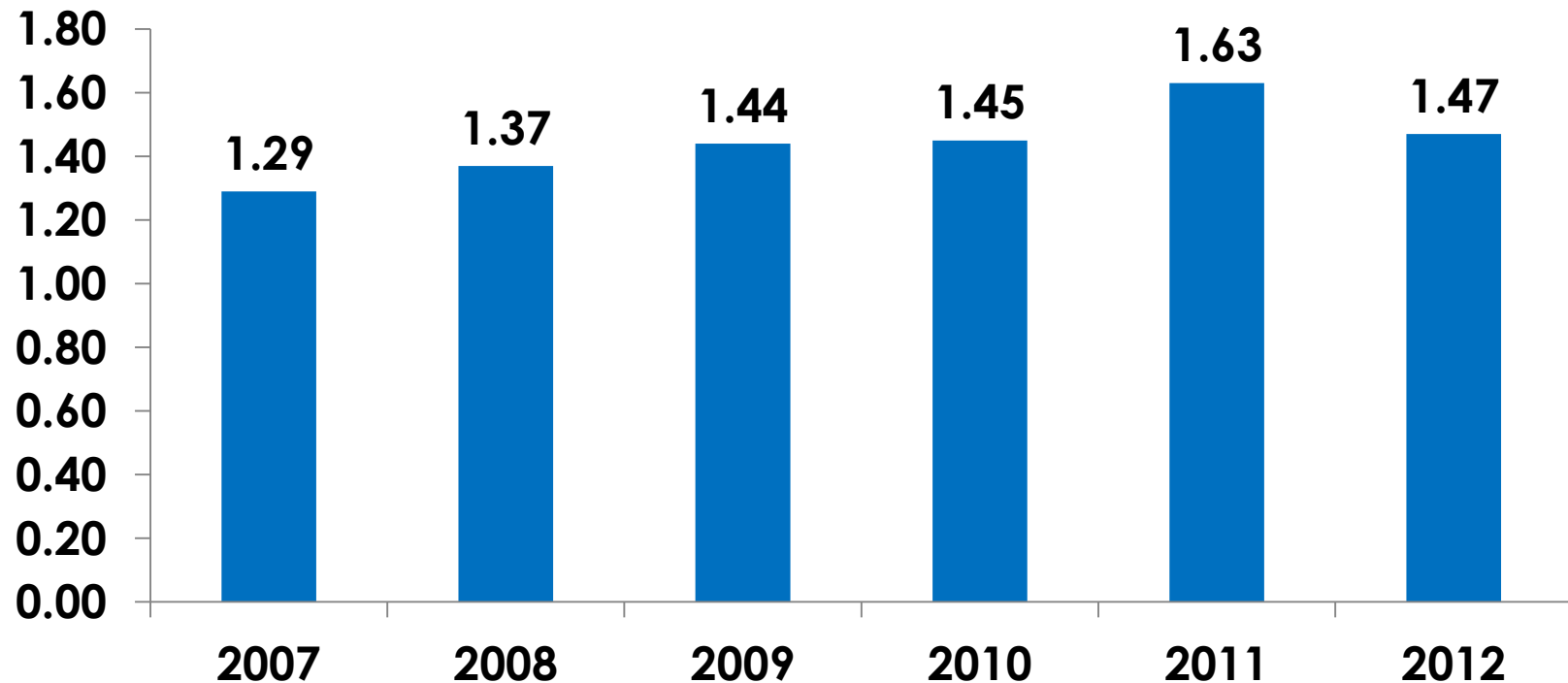
Repeat Visitors Last Trip

n = 48



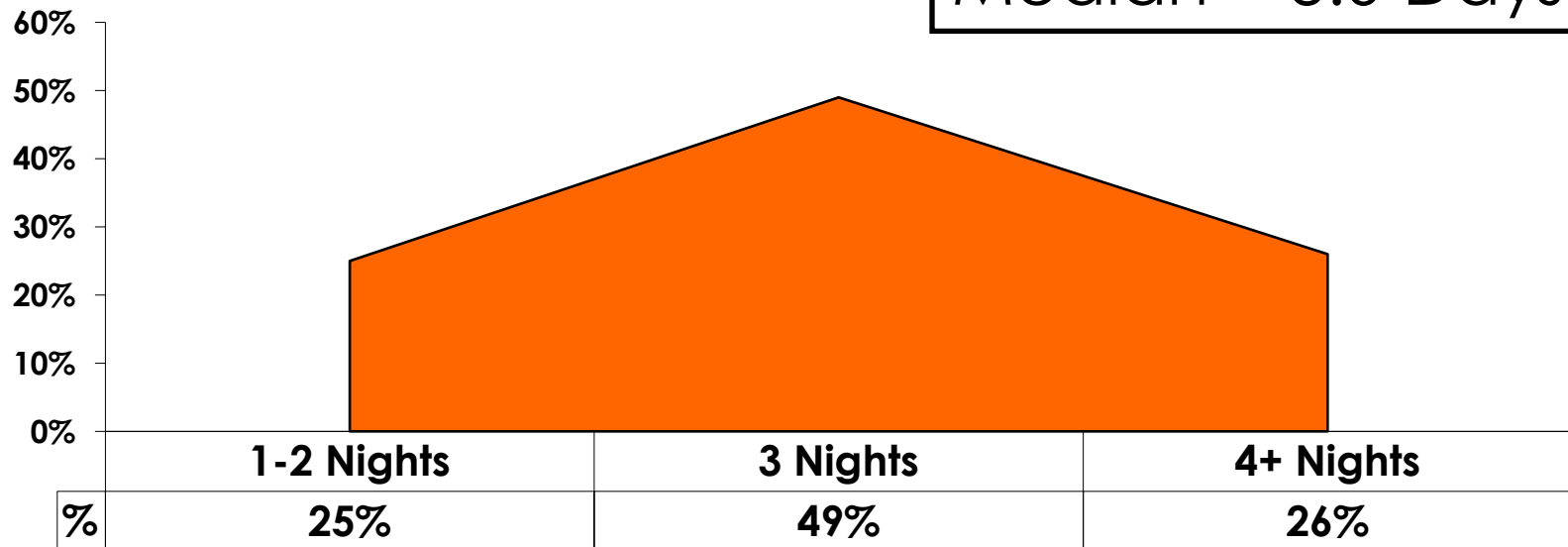
- The average repeat visitor has been to Guam 1.8 times.

Average Number Overnight Trips (2007-2012) (2 nights or more)

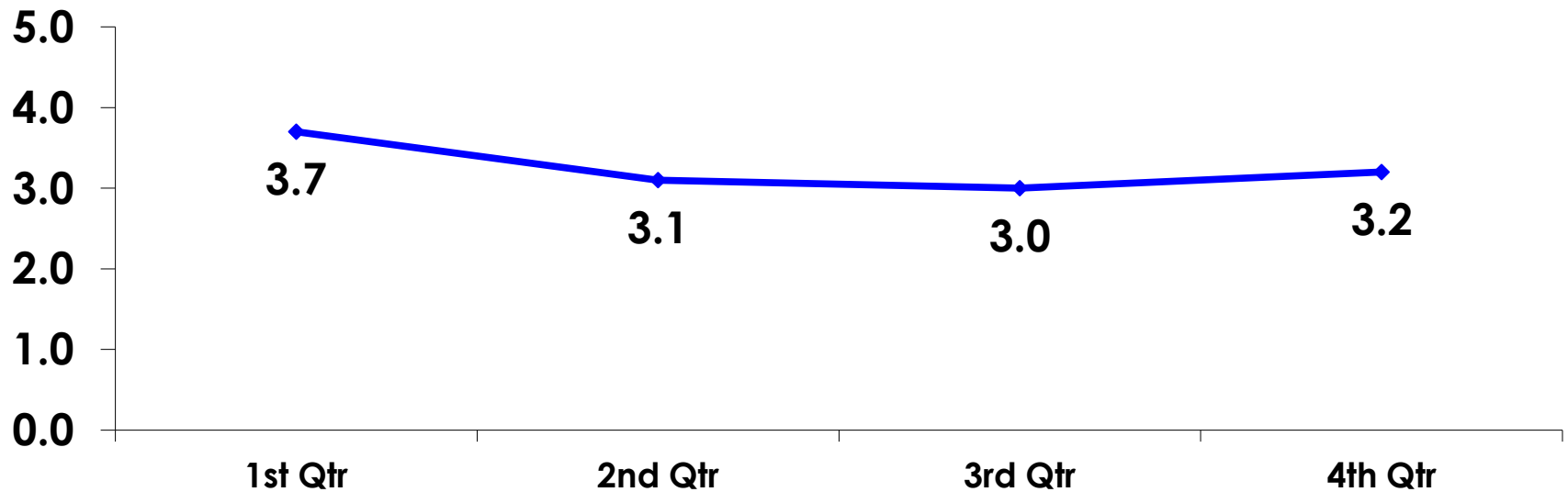


Length of Stay

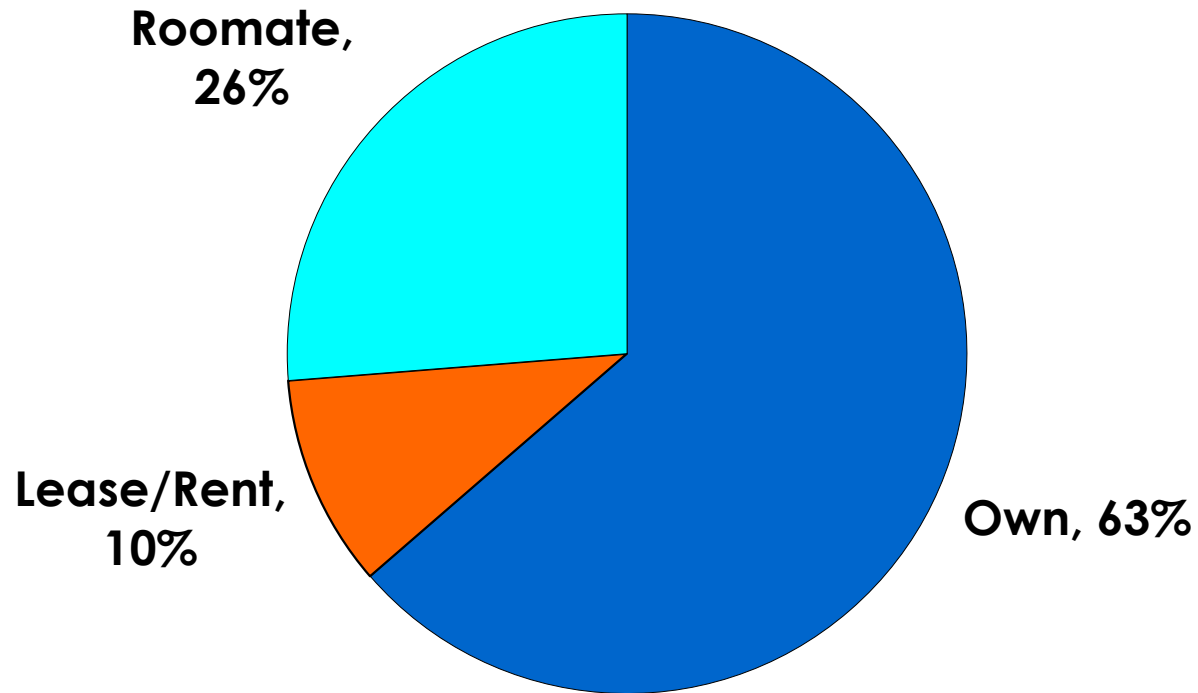
Mean = 3.20 Days
Median = 3.0 Days



AVG LENGTH OF STAY



Living Accommodations

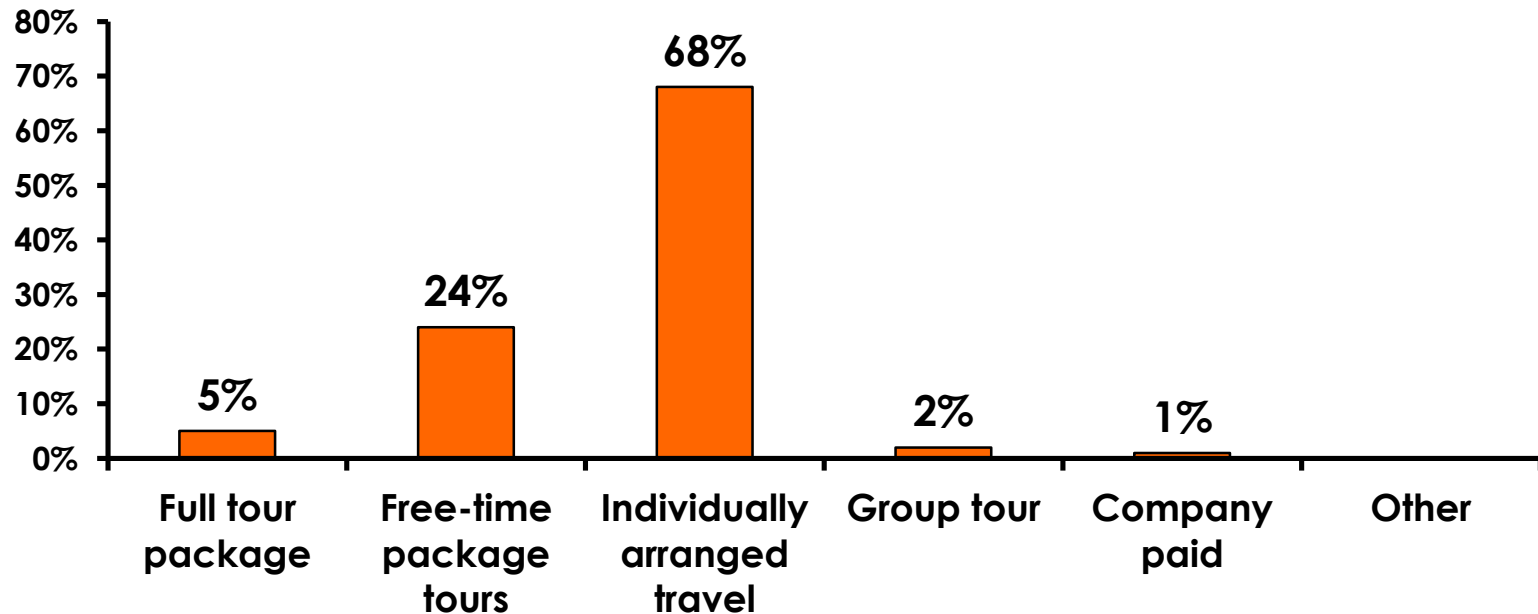


Occupation by Income

		TOTAL	PERSONAL INCOME				Refused
			<240K	240K-1.0M	1.0M-3.0M	3.0M+	
Q.33	Comp Emp-Office worker	42%	44%	41%	30%		
	Comp Emp- Salesperson	18%	16%	18%	7%		25%
	Professional/ Specialist	13%	8%	15%	22%	40%	
	Free-lancer	5%	4%	6%	11%		
	Govt-Manager/Exec	4%		6%	15%		
	Govt-office worker	4%		6%	4%		
	Skilled worker	4%		4%		20%	
	Other	3%	8%	3%	4%		
	Retired	3%		1%			50%
	Student	2%	12%	1%	4%		25%
	Govt- Executive	1%	8%		4%	40%	
Total	Count	426	25	235	27	5	4

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

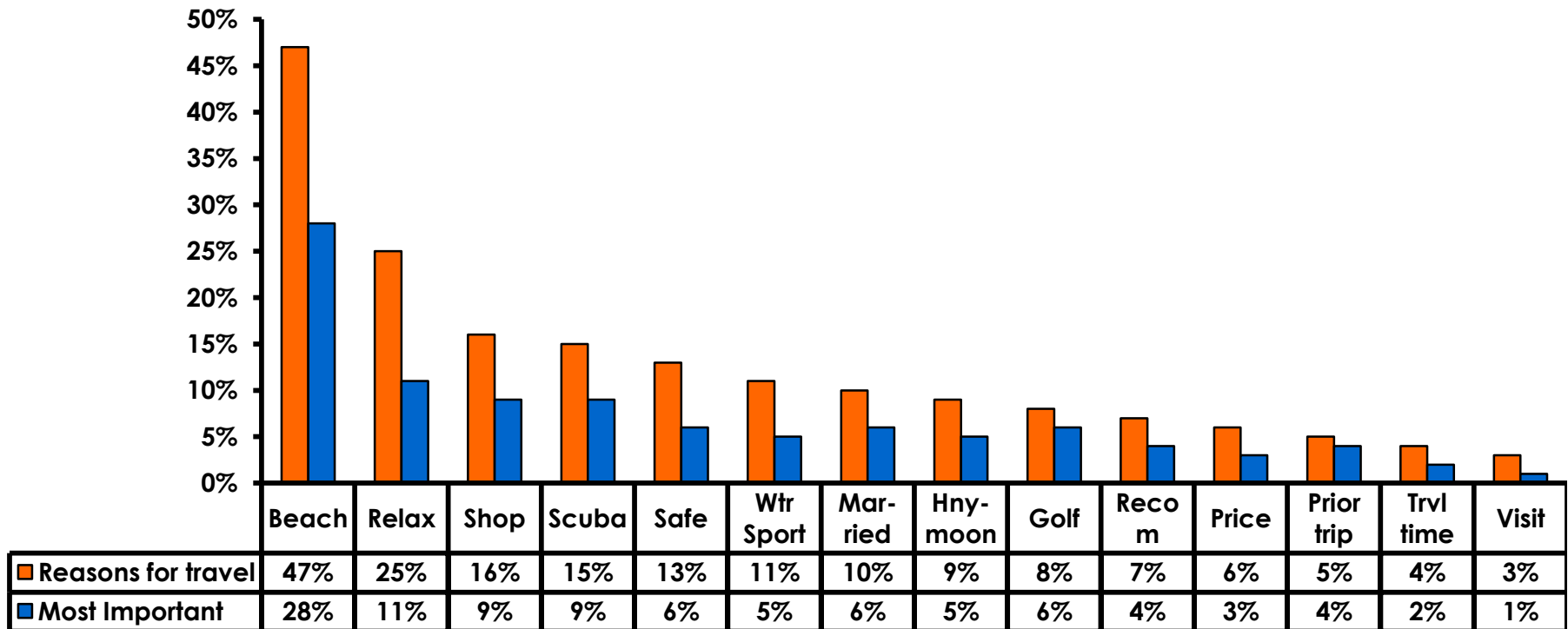


Accommodation by Income

Average length of stay: 3.20 days

		TOTAL	PERSONAL INCOME				Refused
			<240K	240K-1.0M	1.0M-3.0M	3.0M+	
Q.9	Hilton Guam Resort & Spa	34%	29%	34%	21%		20%
	Pacific Islands Club PIC	14%	4%	14%	17%		
	Royal Orchid Guam	8%	4%	7%	3%		
	Fiesta Resort Guam	6%	17%	7%	7%		40%
	Sheraton Laguna Resort	6%	8%	6%	10%		20%
	Hyatt Regency Guam	7%		5%	7%	20%	
	The Westin Resort Guam	4%	4%	3%	14%		
	GuamMarriott Resort Hotel	3%	4%	4%		40%	
	Holiday Resort Guam	3%	4%	4%		20%	20%
	Hotel Nikko Guam	3%		3%	3%		
	Outrigger Guam Resort	2%		2%	3%		
	Oceanview Hotel	2%	13%	2%		20%	
	Bayview Hotel	1%	4%	2%			
	Relatives, Friends, Home Stay	1%		2%	3%		
	Leo Palace Resort	1%		1%			
	GuamReef Hotel	1%	4%	1%			
	Onward Beach Resort	1%		0%	3%		
	GuamPlaza Hotel	1%		0%	3%		
	Pacific Bay Hotel	1%		0%	3%		
	Tumon Bay Capital Hotel	0%	4%				
	Hotel Sane Fe	0%		0%			
	GuamAurora Resort Villa & Spa	0%		0%			
	Grand Plaza Hotel	0%		0%			
	Other	0%		0%			
Total	Count	594	24	249	29	5	5

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Relaxation and
- Scuba/ Shopping

are the three reasons mentioned most often as the most important reason for this particular trip.

Motivation by Age & Gender

	TOTAL	AGE					GENDER	
		<20	20-29	30-39	40-49	50+	Male	Female
Q.5 Beautiful seas, beaches, tropical climate	47%	100%	43%	52%	48%	45%	47%	48%
Just to relax	25%	100%	24%	29%	21%	14%	25%	25%
Shopping	16%		13%	21%	15%	14%	17%	15%
SCUBA diving	15%		19%	13%	12%	2%	15%	14%
It is a safe place to spend a vacation	13%	100%	11%	14%	14%	14%	13%	14%
Water sports	11%		12%	10%	9%	9%	12%	10%
To get married or Attend wedding	10%	100%	7%	12%	8%	14%	9%	10%
Honeymoon	9%		11%	11%	2%		9%	9%
To golf	8%		6%	9%	8%	11%	7%	9%
Recommendation of friend, relative, travel agency	7%	100%	7%	5%	11%	7%	8%	6%
Price of the tour package	6%		6%	6%	8%	11%	6%	7%
A previous visit	5%		3%	3%	8%	23%	6%	4%
Short travel time	4%		5%	4%	4%	2%	5%	4%
To visit friends or relatives	3%		3%	2%	4%	9%	3%	2%
Pleasure	2%		2%	2%	2%	2%	2%	3%
Career certification or testing	2%		3%	1%			1%	2%
Company or Business trip	1%		0%	2%	1%		1%	1%
Promotional materials from GVB	1%		0%		4%		0%	1%
Other	0%			2%			0%	1%
My company sponsored me	0%			1%	1%			1%
Convention, Conference, Trade show	0%					2%	0%	
Total Cases	601	1	261	196	85	44	350	251

Motivation by Income

	TOTAL	PERSONAL INCOME				
		<240K	240K-1.0M	1.0M-3.0M	3.0M+	Refused
Q.5 Beautiful seas, beaches, tropical climate	47%	56%	53%	69%	80%	80%
Just to relax	25%	40%	28%	28%		60%
Shopping	16%	12%	16%	21%	20%	20%
SCUBA diving	15%	12%	16%	17%		
It is a safe place to spend a vacation	13%	12%	16%	24%	20%	20%
Water sports	11%	16%	9%	34%	40%	
To get married or Attend wedding	10%	8%	13%	3%	20%	20%
Honeymoon	9%	12%	12%	7%		40%
Recommendation of friend, relative, travel agency	7%	4%	6%	21%	20%	20%
To golf	8%		9%		20%	
Price of the tour package	6%	4%	6%	7%	20%	20%
A previous visit	5%	4%	5%	3%		
Short travel time	4%		4%	10%	20%	20%
To visit friends or relatives	3%		2%	7%		
Pleasure	2%	4%	3%	3%		
Career certification or testing	2%	16%	2%			
Company or Business trip	1%		1%		20%	
Other	0%	4%	1%			
My company sponsored me	0%		1%			
Promotional materials from GVB	1%					
Convention, Conference, Trade show	0%			3%		
Total Cases	601	25	250	29	5	5

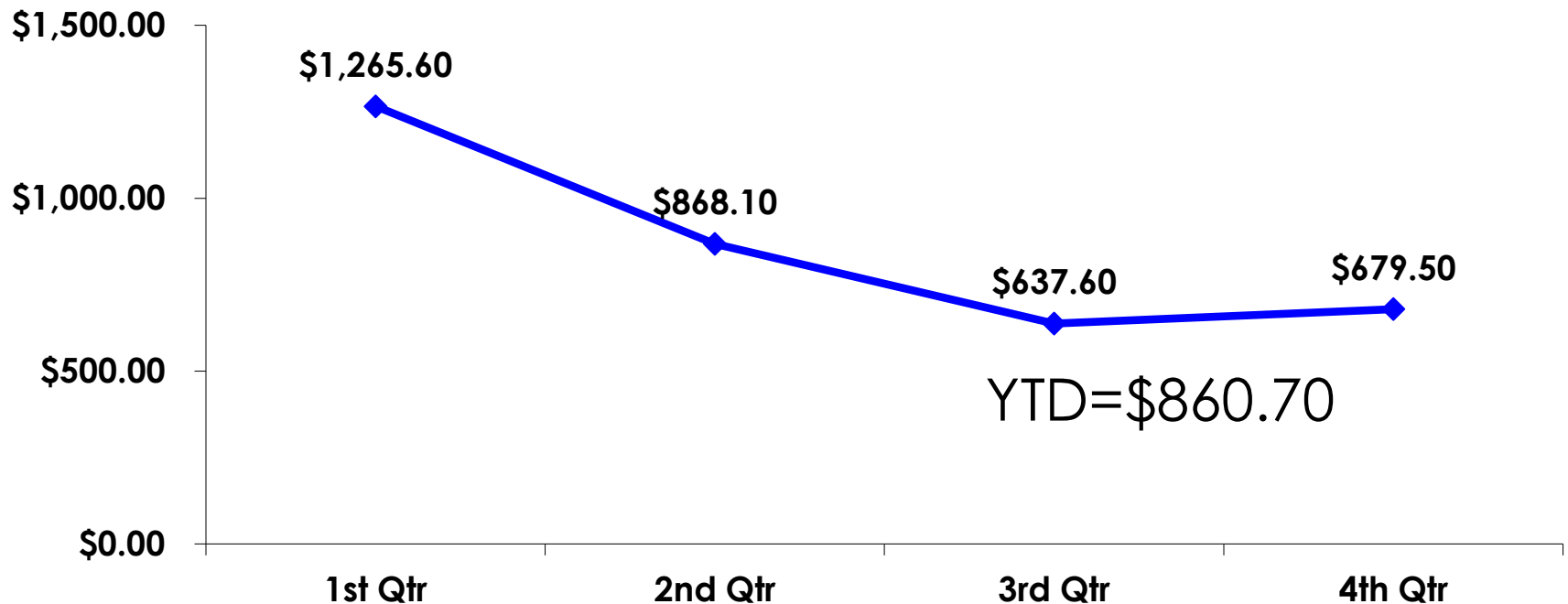
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

HKD Varies/US\$1

- \$1,613.90 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$19,354 = maximum (highest amount recorded for the entire sample)
- \$860.70 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES Per Person



Breakdown of Prepaid Expenditures

HKD Varies=\$1

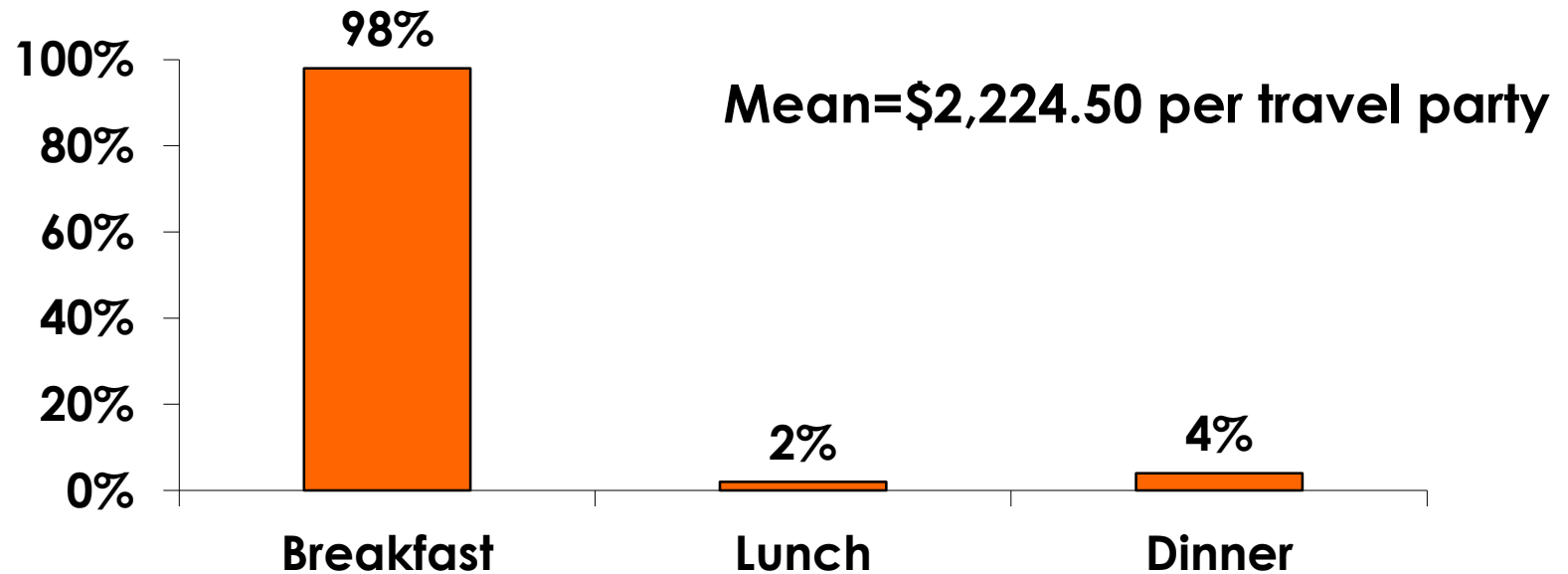
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$1,912.00
Air & Accommodation w/ daily meal package	\$2,224.50
Air only	\$2,048.20
Accommodation only	\$2,667.90
Accommodation w/ daily meal only	\$673.10
Food & Beverages in Hotel	\$187.80
Ground transportation – Hong Kong	\$122.00
Ground transportation – Guam	\$143.80
Optional tours/ activities	\$700.40
Other expenses	\$820.20
Total Prepaid	\$1,613.90

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

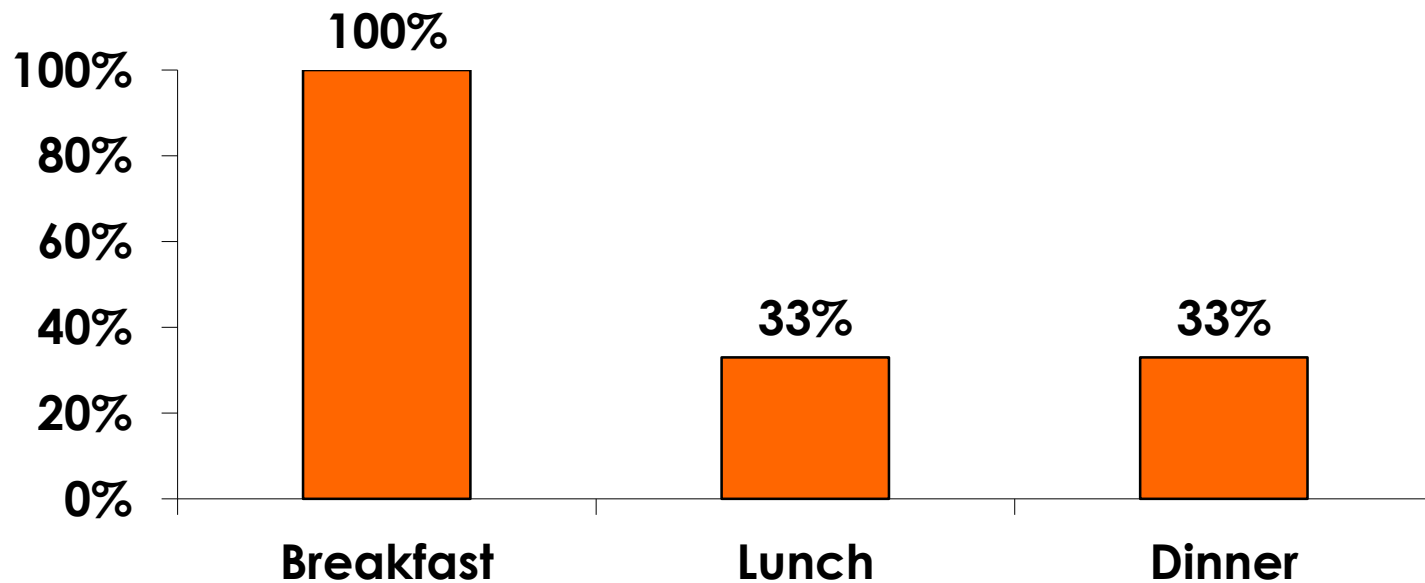
n=198



PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

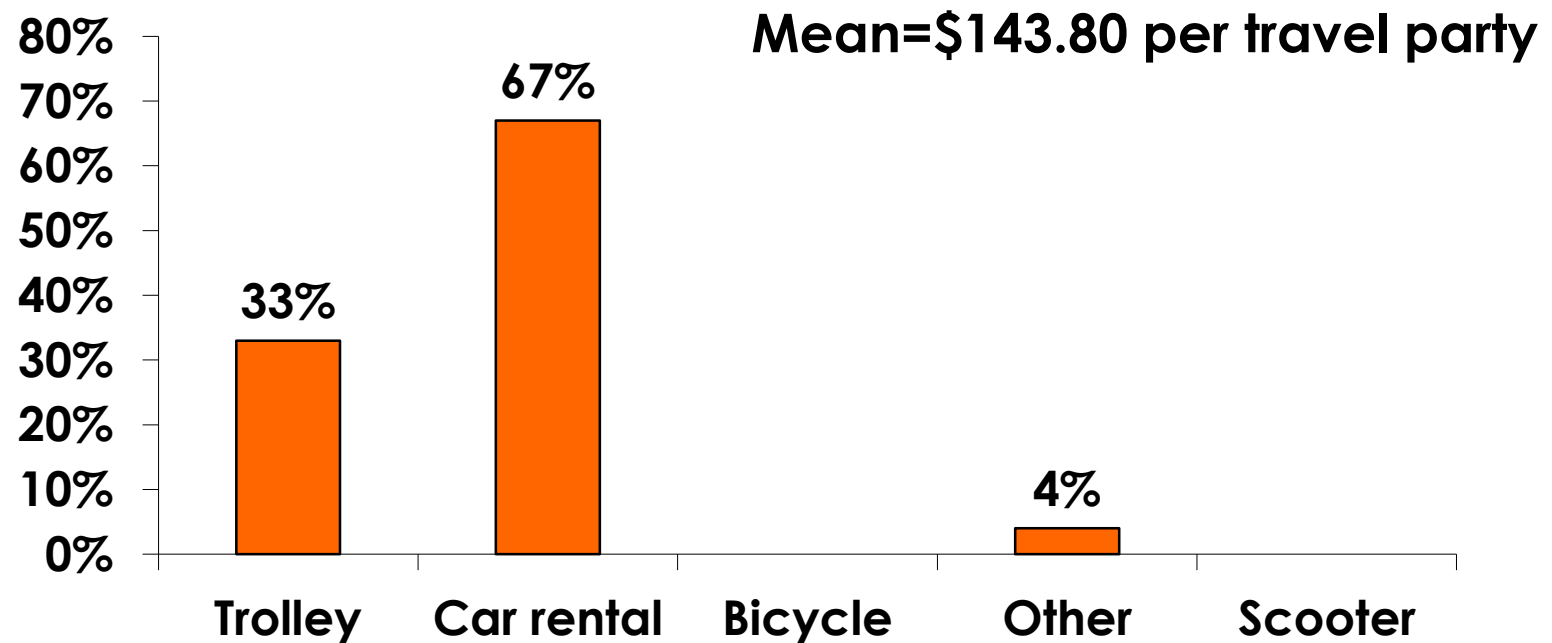
n= 3



Mean= \$673.10 per travel party

PREPAID GROUND TRANSPORTATION

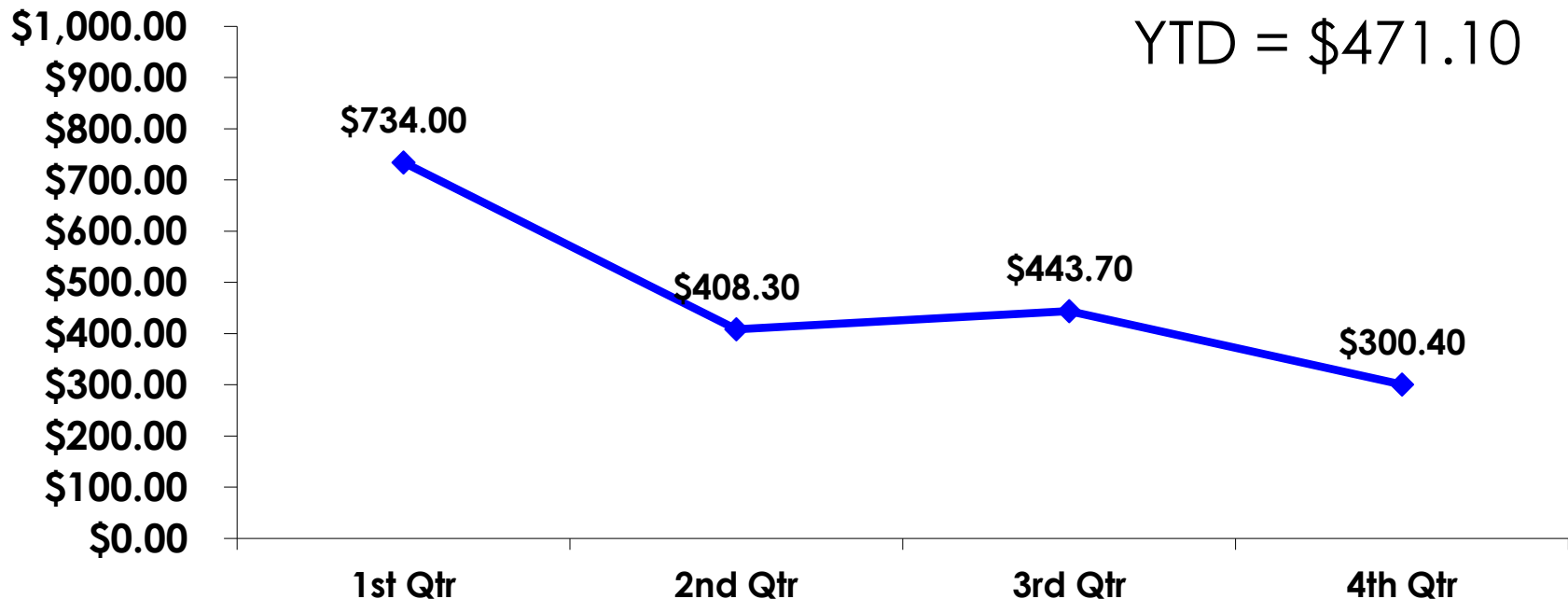
n=24



On-Island Expenditures

- \$830.30 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$11,200 = Maximum (highest amount recorded for the entire sample)
- \$471.10 = overall mean average per person on-island expenditure

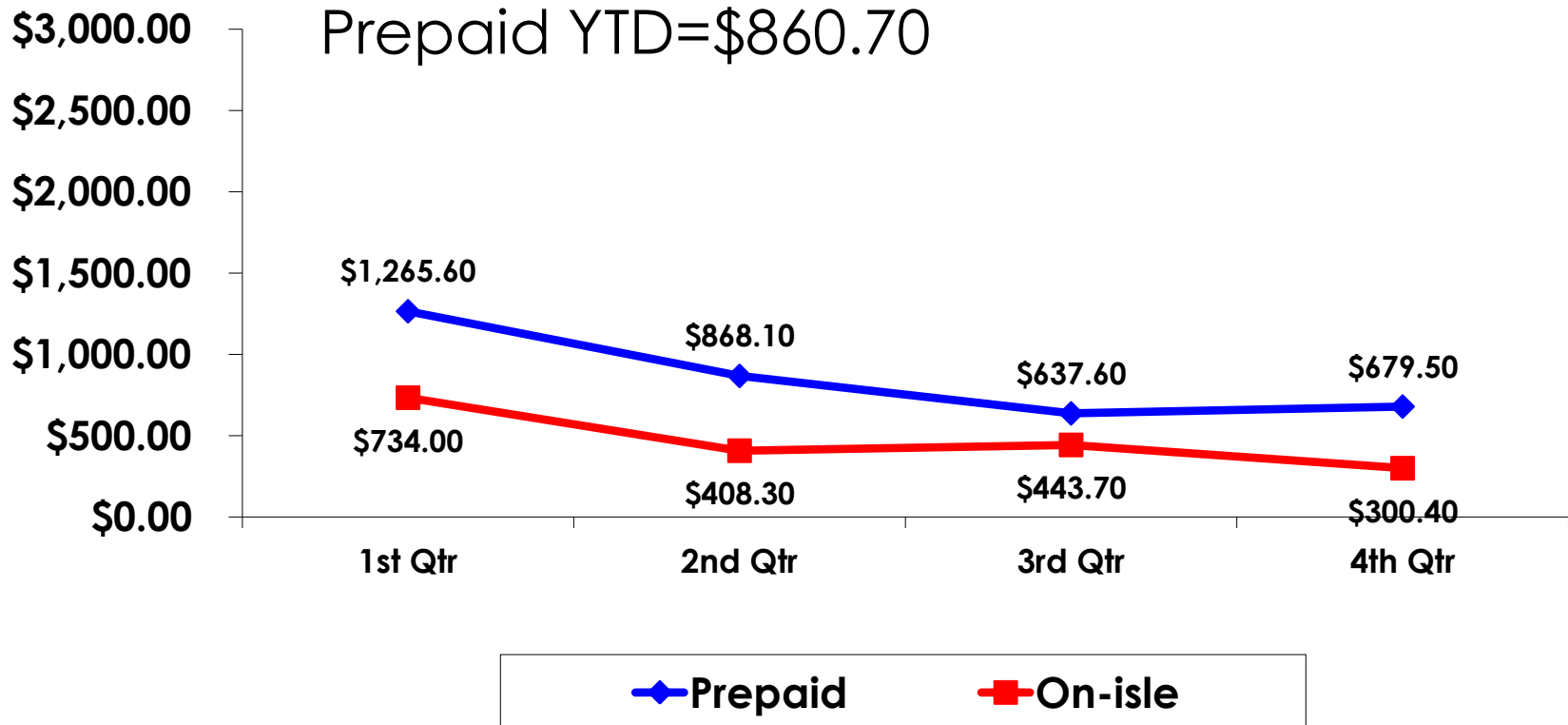
ON-ISLAND EXPENDITURES Per Person



PREPAID/ ON-ISLE EXPENDITURES - Per Person

On-Isle YTD = \$471.10

Prepaid YTD=\$860.70



Total On-Island Expenditure by Gender & Age

		GENDER			GENDER								
		TOTAL	Male	Female	Male					Female			
					AGE					AGE			
					<20	20-29	30-39	40-49	50+	20-29	30-39	40-49	50+
Q.11A	Mean	\$830.30	\$848.01	\$805.59	\$0.00	\$756.07	\$936.38	\$960.70	\$802.00	\$692.49	\$873.72	\$923.69	\$744.38
	Median	\$640	\$600	\$680	\$0	\$578	\$692	\$800	\$600	\$600	\$750	\$789	\$600

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$70.51	\$69.37	\$72.08	\$0.00	\$69.53	\$70.79	\$77.94	\$66.59
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$28.70	\$24.72	\$34.19	\$0.00	\$27.77	\$34.34	\$23.16	\$24.77
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$44.08	\$44.46	\$43.55	\$0.00	\$38.80	\$43.63	\$53.61	\$56.48
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$110.11	\$108.34	\$112.56	\$0.00	\$109.40	\$109.94	\$106.01	\$117.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$143.59	\$153.21	\$130.32	\$0.00	\$100.21	\$145.94	\$258.99	\$144.74
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$58.72	\$58.88	\$58.51	\$0.00	\$47.95	\$61.56	\$84.26	\$55.10
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$23.04	\$22.50	\$23.79	\$0.00	\$19.29	\$28.65	\$16.96	\$26.92
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$360.31	\$379.55	\$333.68	\$0.00	\$324.83	\$424.37	\$338.29	\$288.95
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL ON ISLAND	Mean	\$830.30	\$848.01	\$805.59	\$0.00	\$729.03	\$908.56	\$946.77	\$781.05
	Median	\$640	\$600	\$680	\$0	\$585	\$701	\$800	\$600

On-Island Expenditures

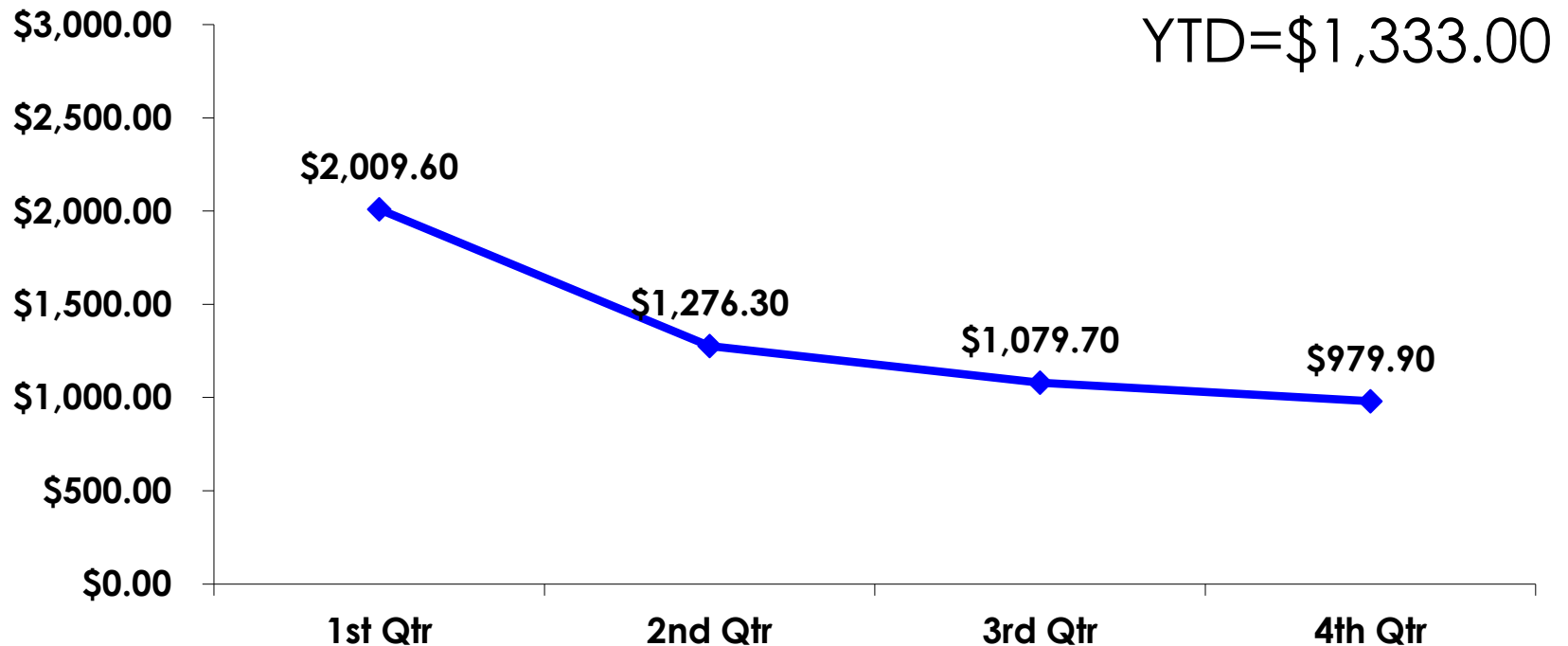
First Timers & Repeaters

		TRIPSTO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$68.65	\$87.37
	Median	\$0	\$50
F&B-FF	Mean	\$28.29	\$33.61
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$44.43	\$41.40
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$109.07	\$120.26
TOUR	Median	\$0	\$0
GIFT/	Mean	\$148.26	\$102.72
SOUV-SELF	Median	\$0	\$100
GIFT/ SOUV-	Mean	\$58.33	\$62.72
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$23.62	\$18.37
	Median	\$0	\$0
OTHEREXP	Mean	\$365.44	\$322.76
	Median	\$0	\$27
TOTAL ON	Mean	\$837.20	\$781.17
ISLAND	Median	\$600	\$800

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,333.00 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,544 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person

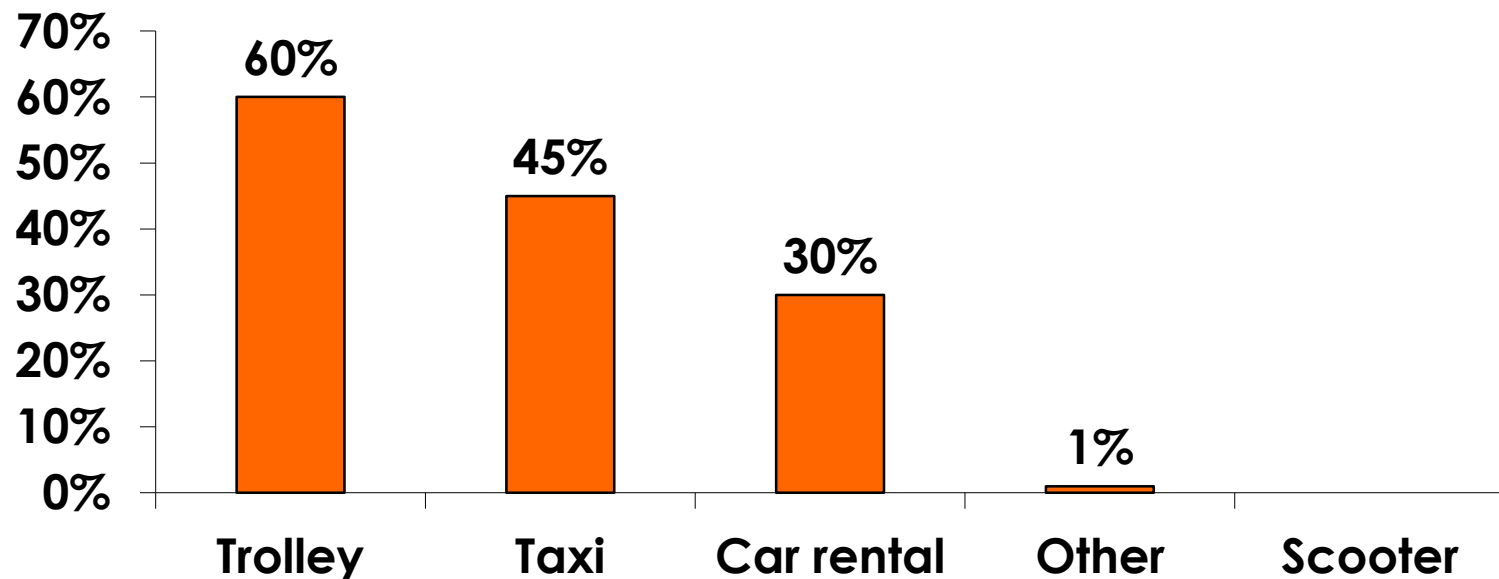


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$70.50
Food & beverage in fast food restaurant/convenience store	\$28.70
Food & beverage at restaurants or drinking establishments outside a hotel	\$44.10
Optional tours and activities	\$110.10
Gifts/ souvenirs for yourself/companions	\$143.60
Gifts/ souvenirs for friends/family at home	\$58.70
Local transportation	\$23.00
Other expenses not covered	\$360.30
Average Total	\$830.30

Local Transportation

n=124



Mean=\$23.00 per travel party

Guam Airport Expenditures

- \$22.10 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,100 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

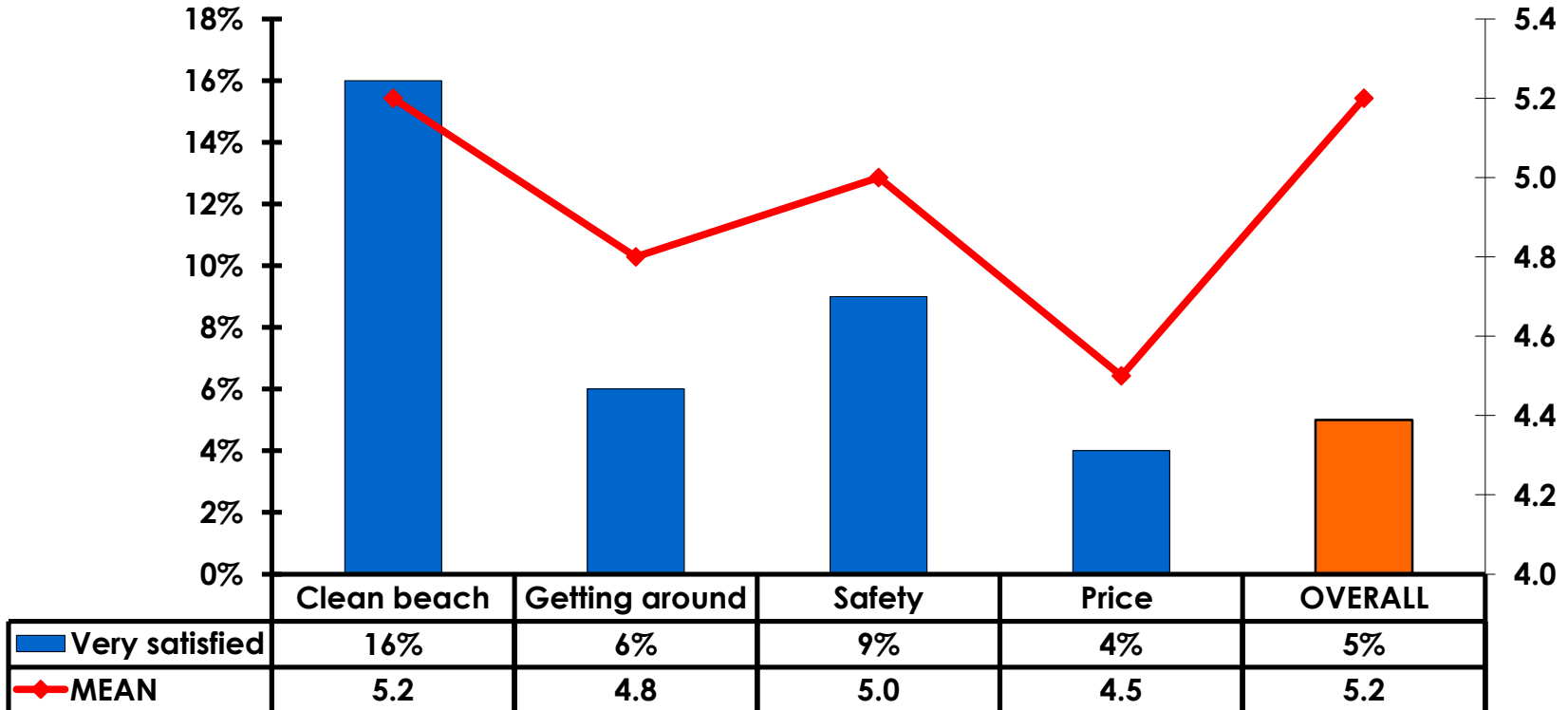
	MEAN \$
Food & Beverages	\$4.10
Gifts/Souvenirs Self	\$11.30
Gifts/Souvenirs Others	\$6.70
Total	\$22.10

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

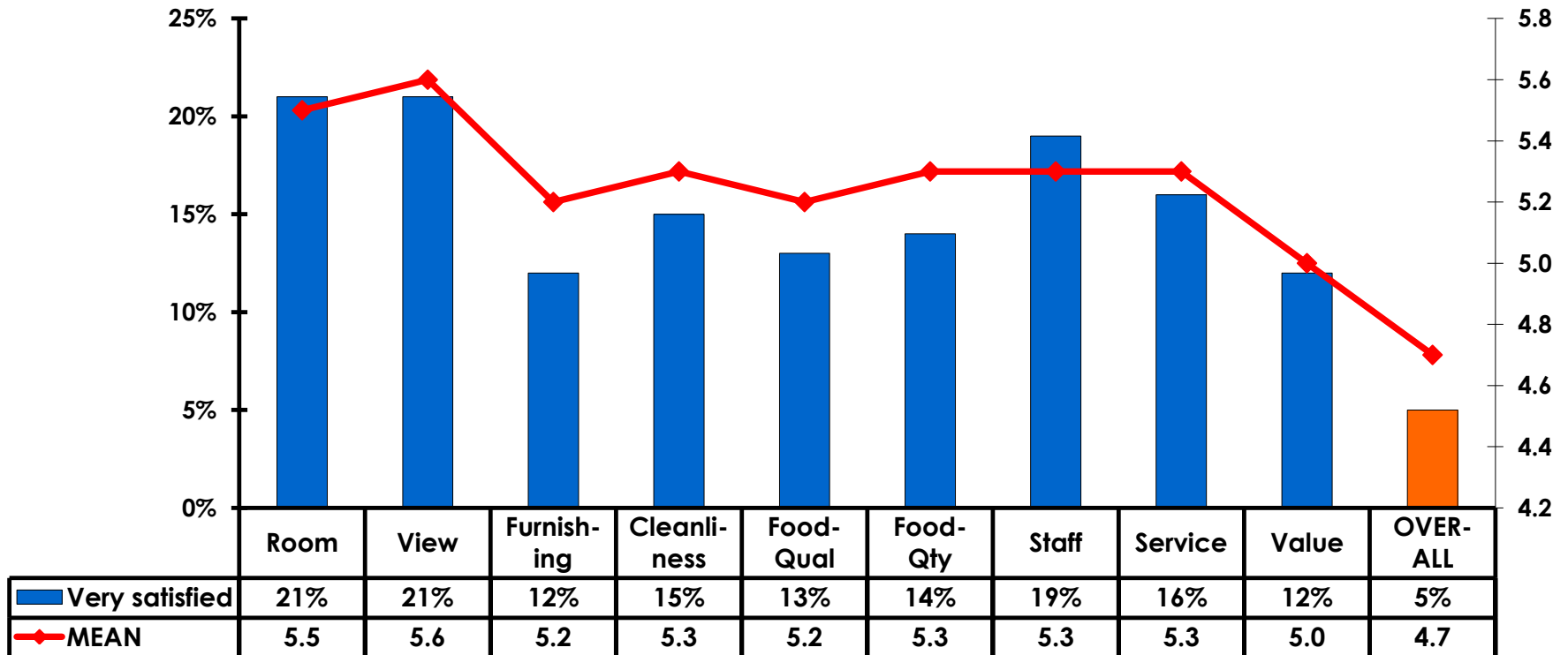
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

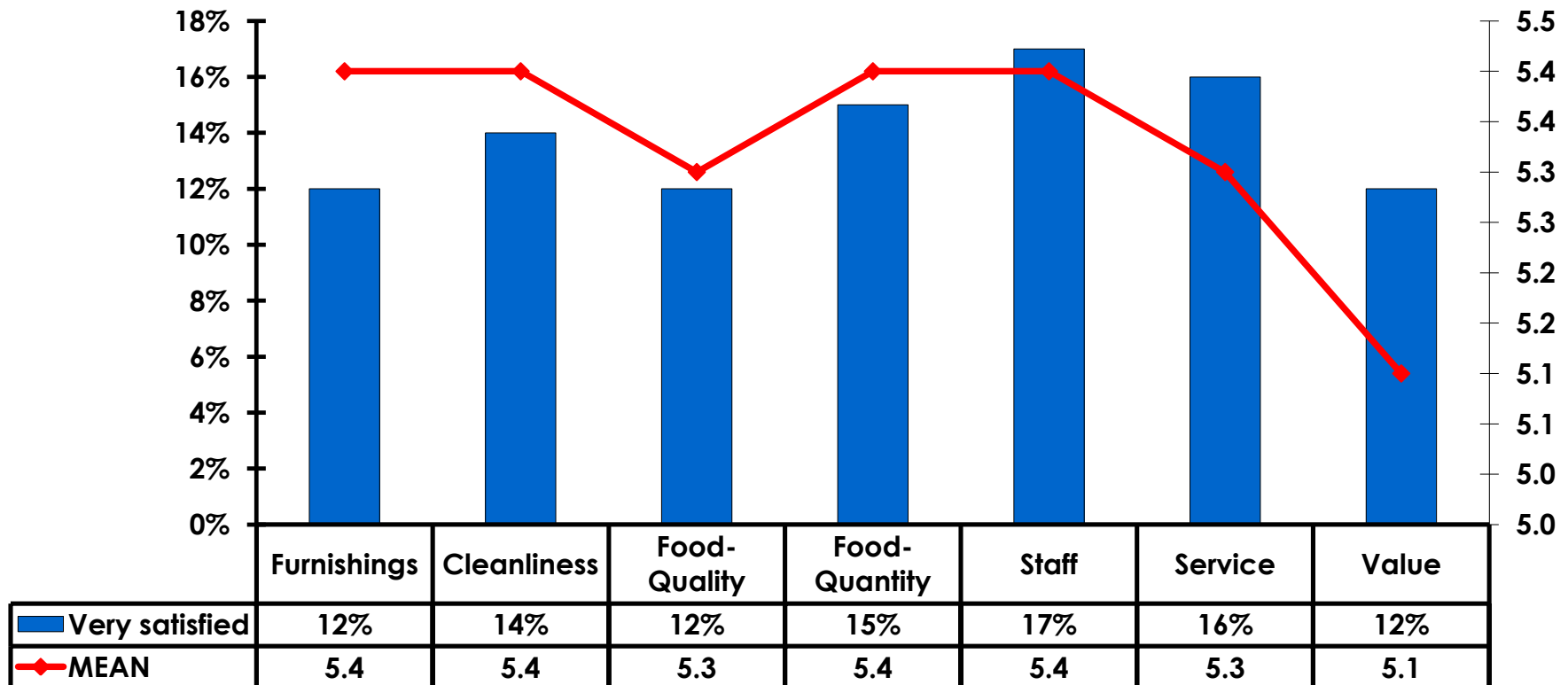
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

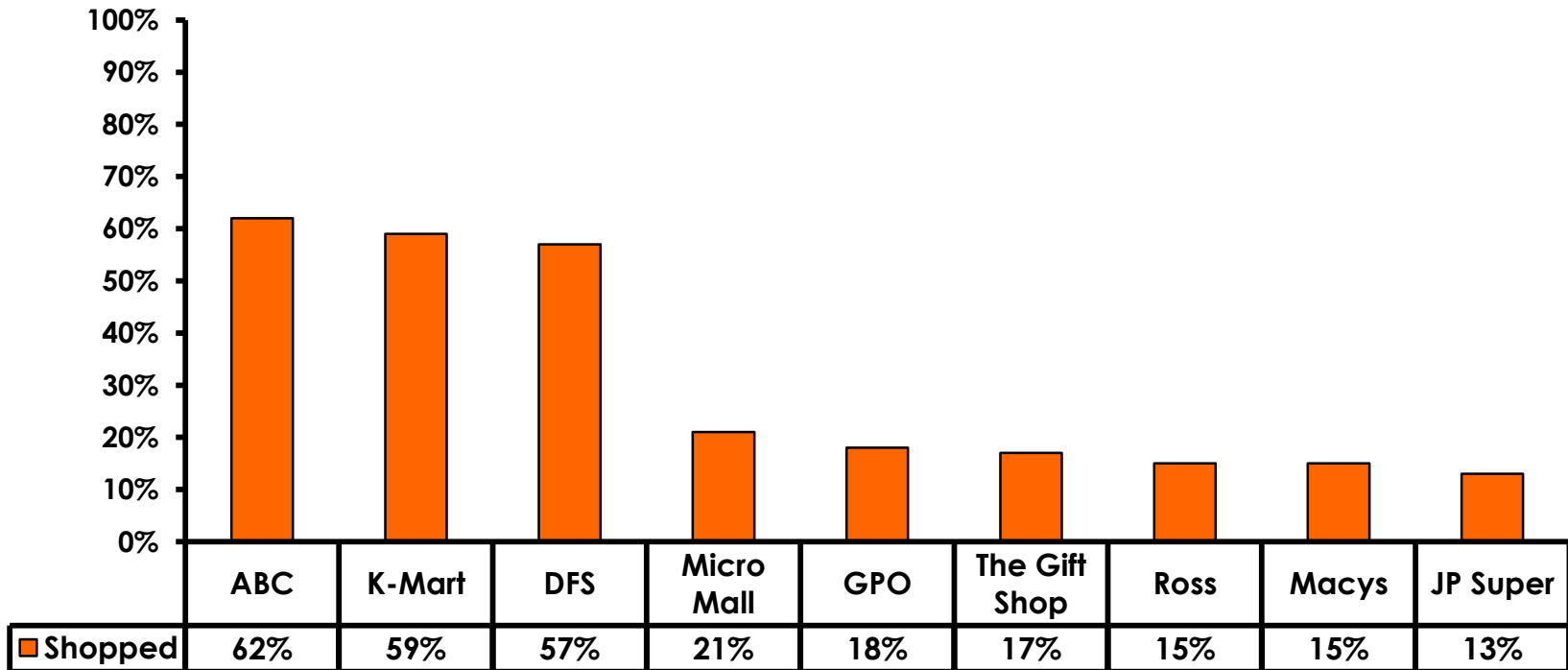
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

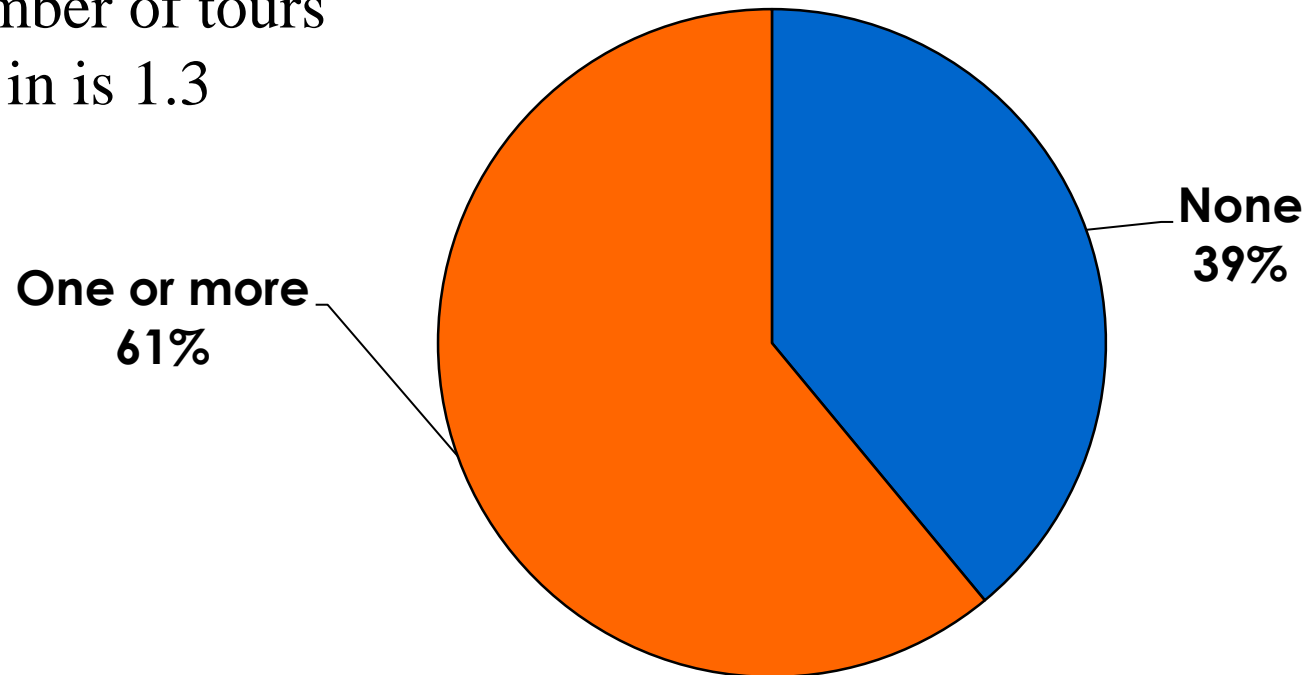
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 22%	Score of 6 to 7 = 21%
Score of 4 to 5 = 72%	Score of 4 to 5 = 71%
Score 1 to 3 = 7%	Score 1 to 3 = 8%
MEAN = 4.7	MEAN = 4.7

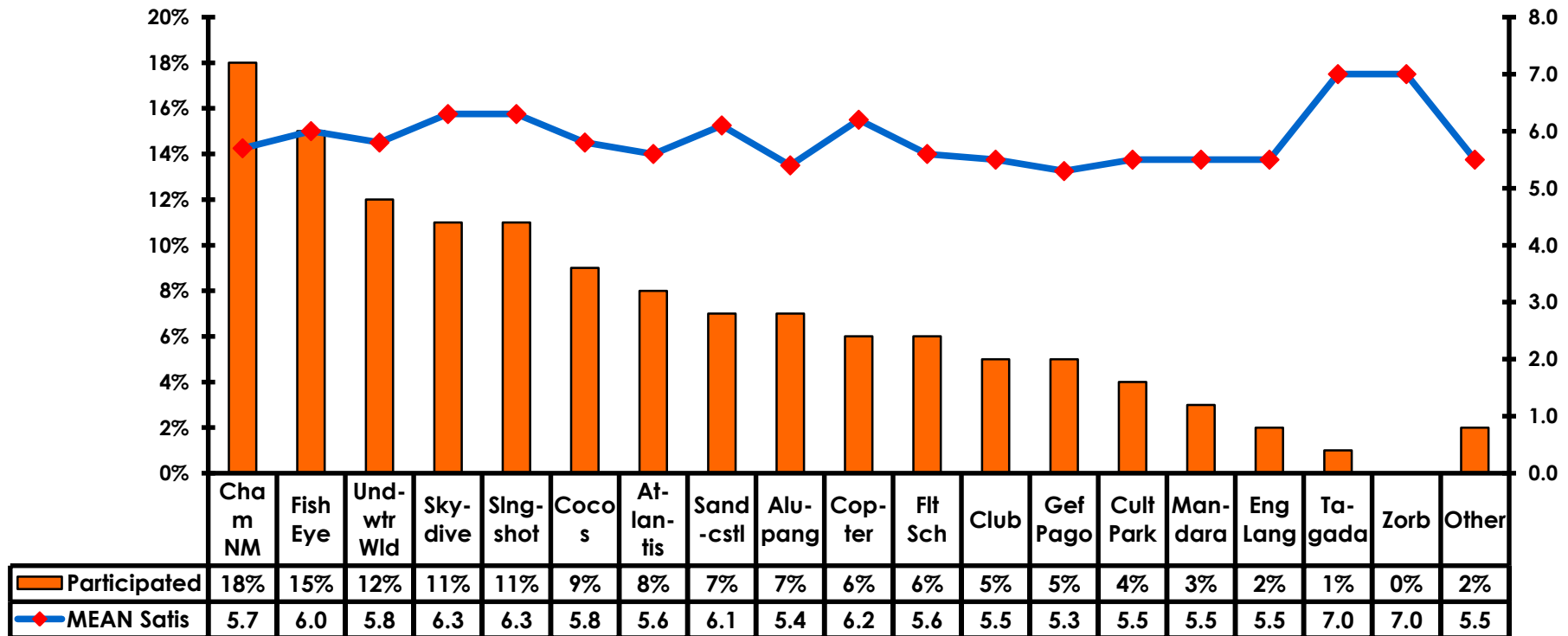
Optional Tour Participation

- Average number of tours participated in is 1.3



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 = 33%	Score of 6 to 7 = 31%
Score of 4 to 5 = 66%	Score of 4 to 5 = 67%
Score 1 to 3 = 1%	Score 1 to 3 = 3%
MEAN = 5.0	MEAN = 5.0

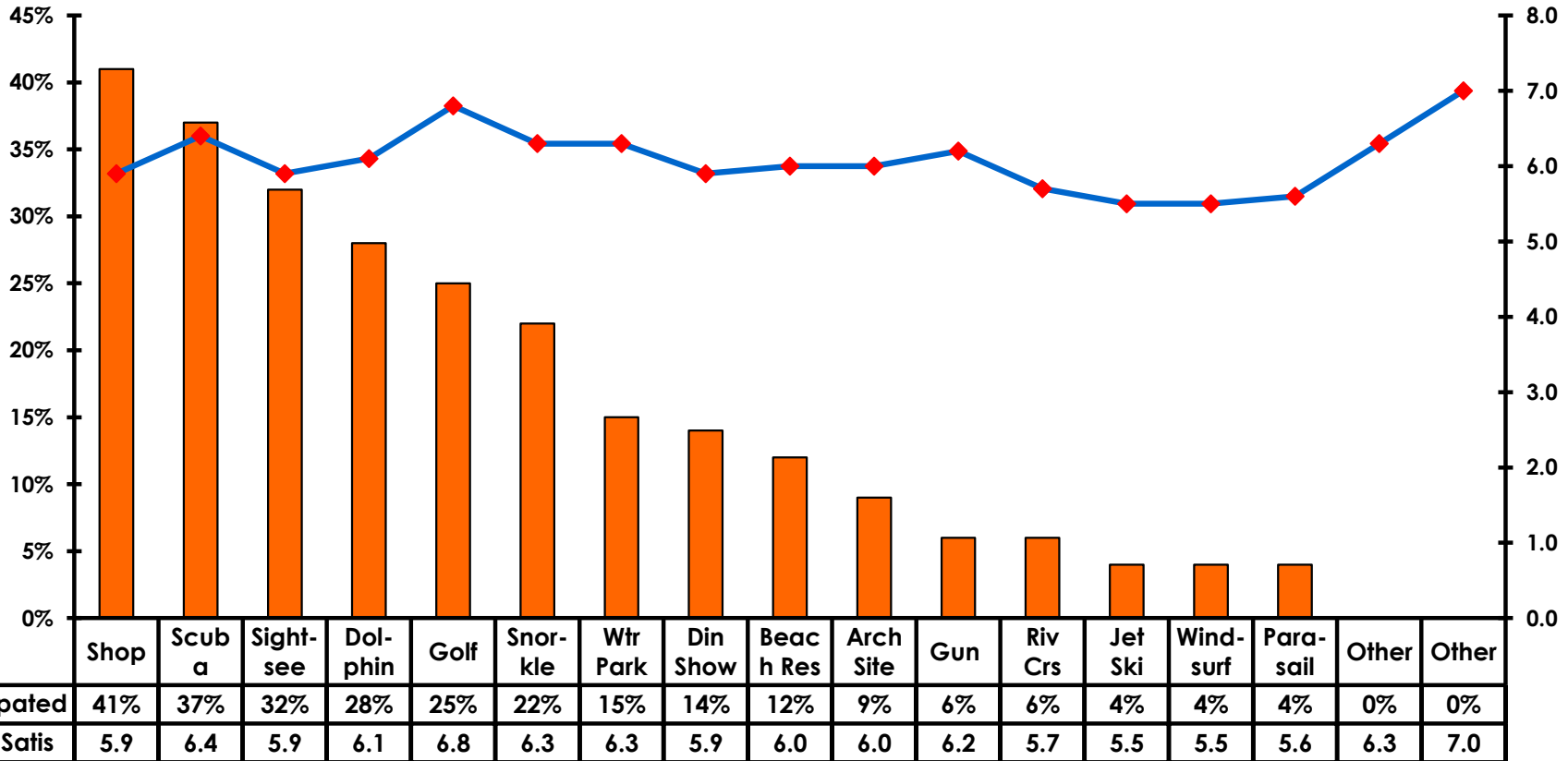
Night Tours Satisfaction

7pt Rating Scale

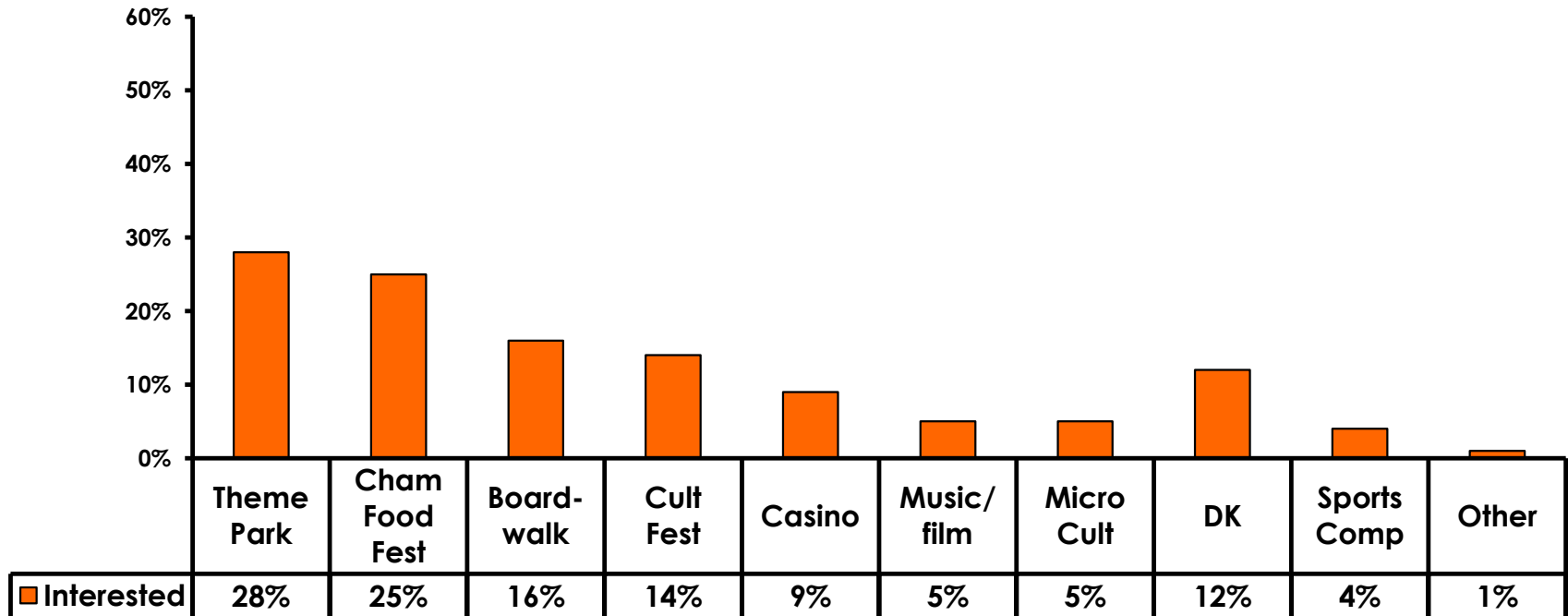
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 24%	Score of 6 to 7 = 23%
Score of 4 to 5 = 71%	Score of 4 to 5 = 70%
Score 1 to 3 = 5%	Score 1 to 3 = 6%
MEAN = 4.8	MEAN = 4.7

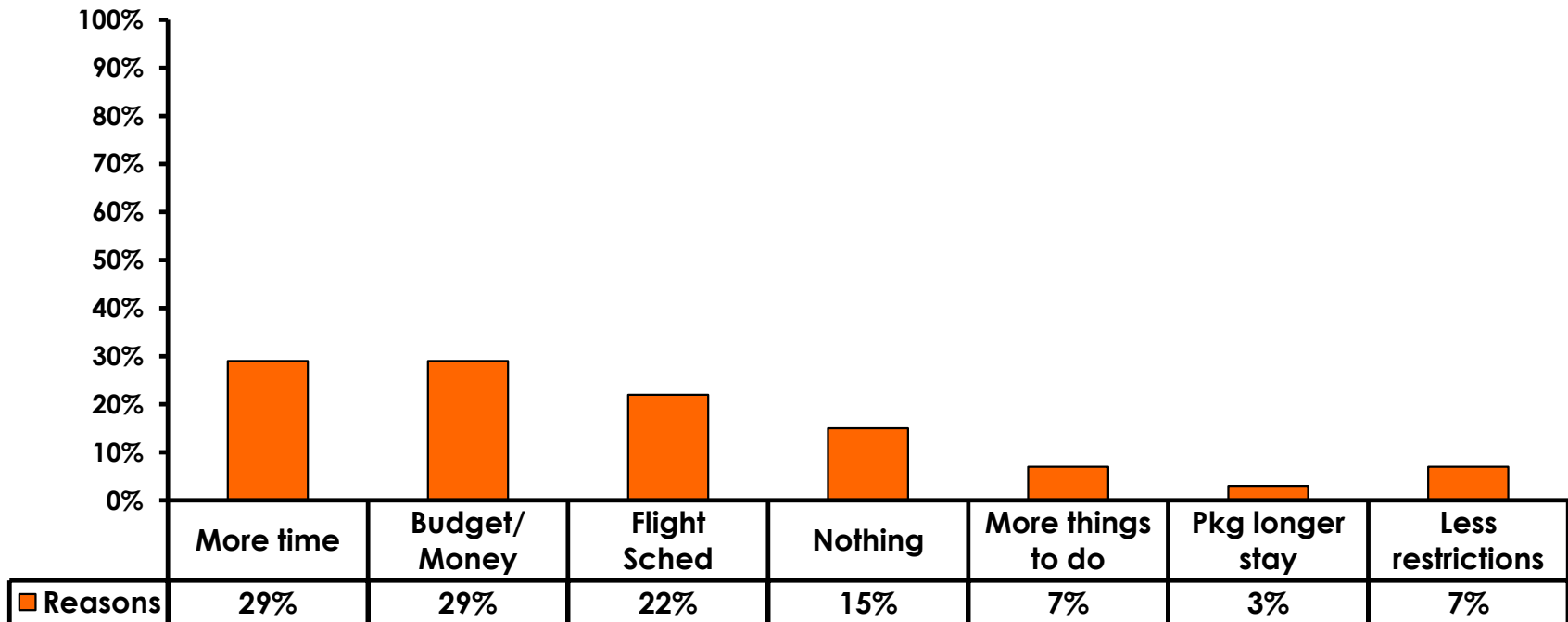
Satisfaction with Other Activities



Which activities or attractions would you most likely participate in if they were available on Guam?



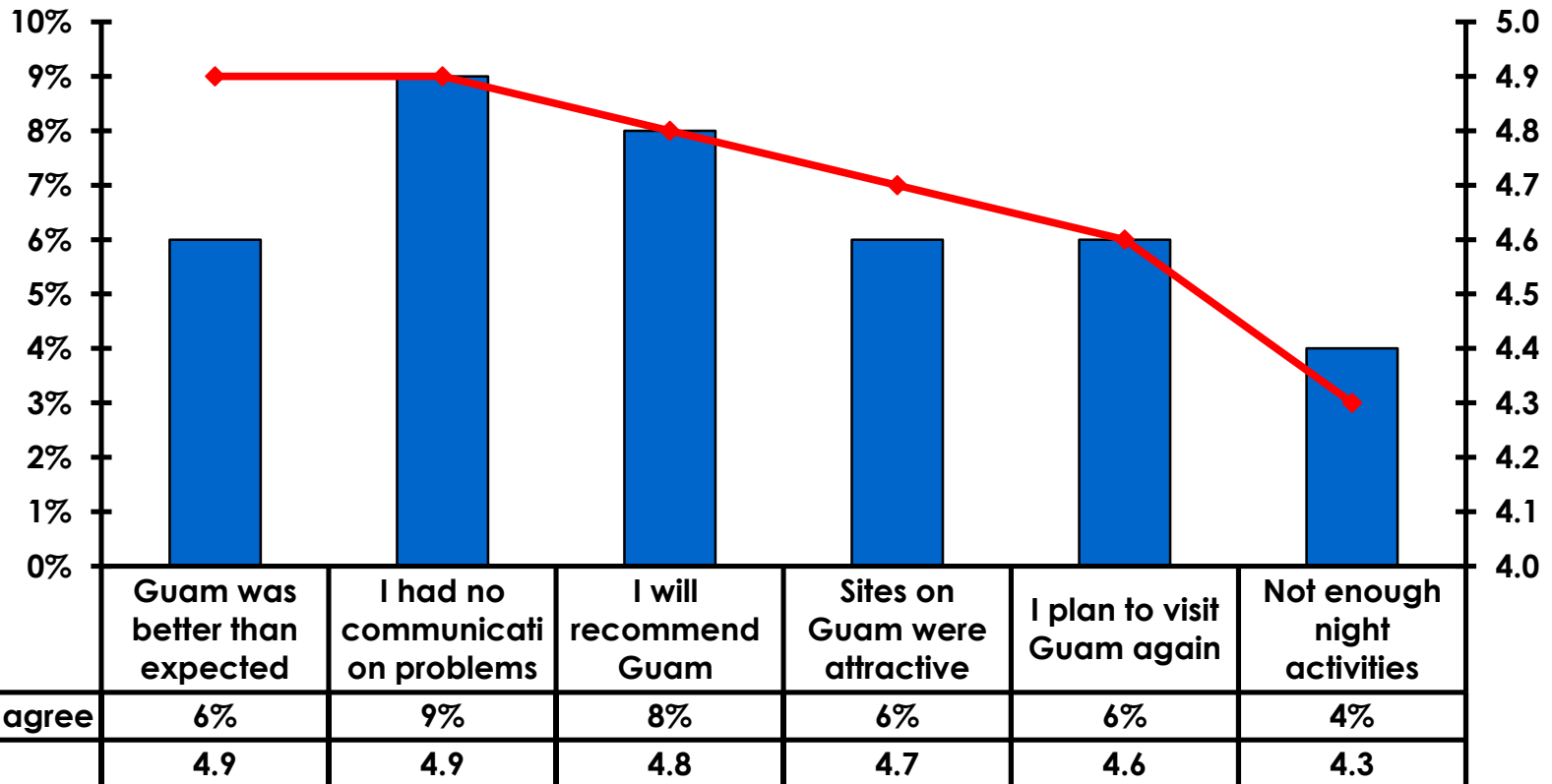
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

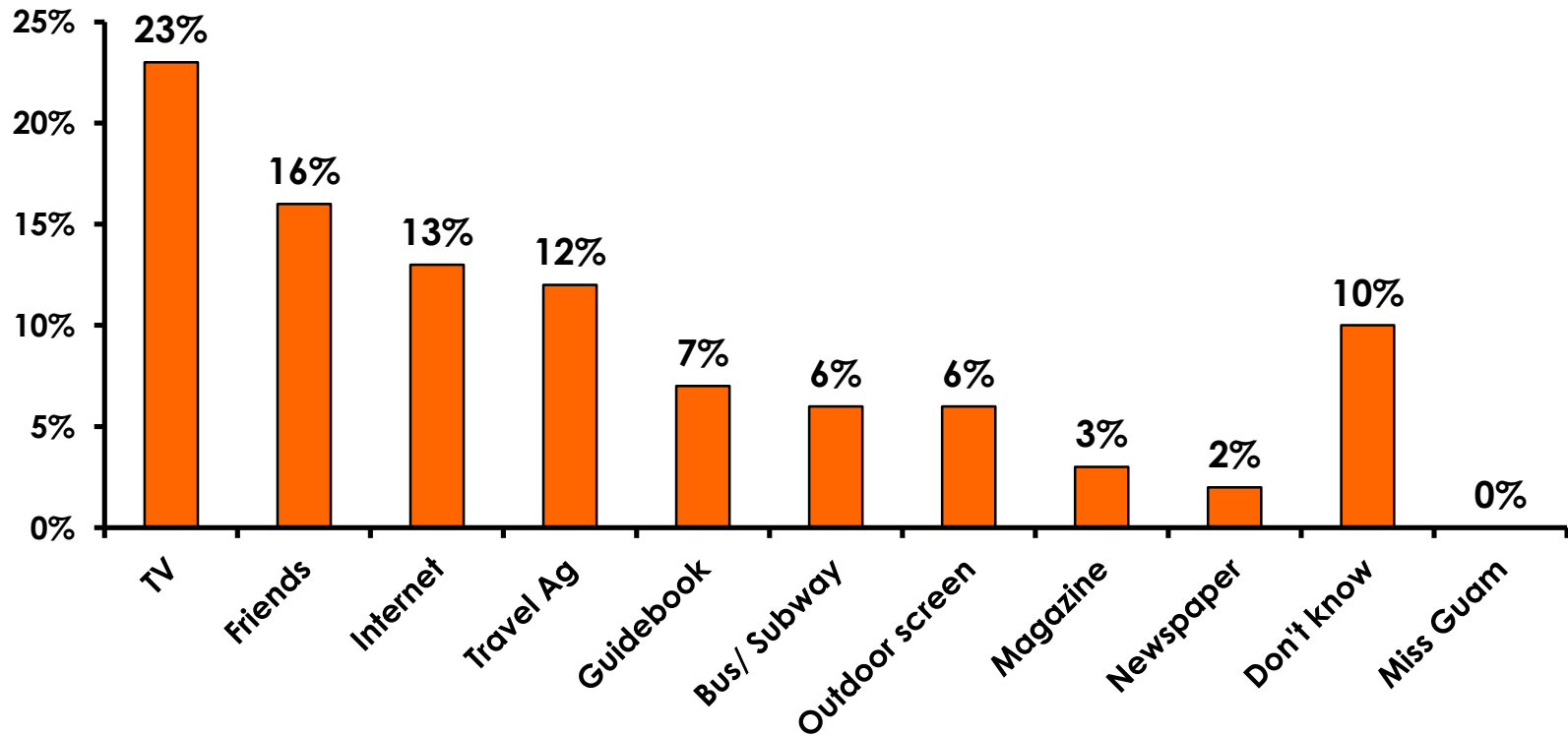
7=Very Satisfied/ 1=Very Dissatisfied



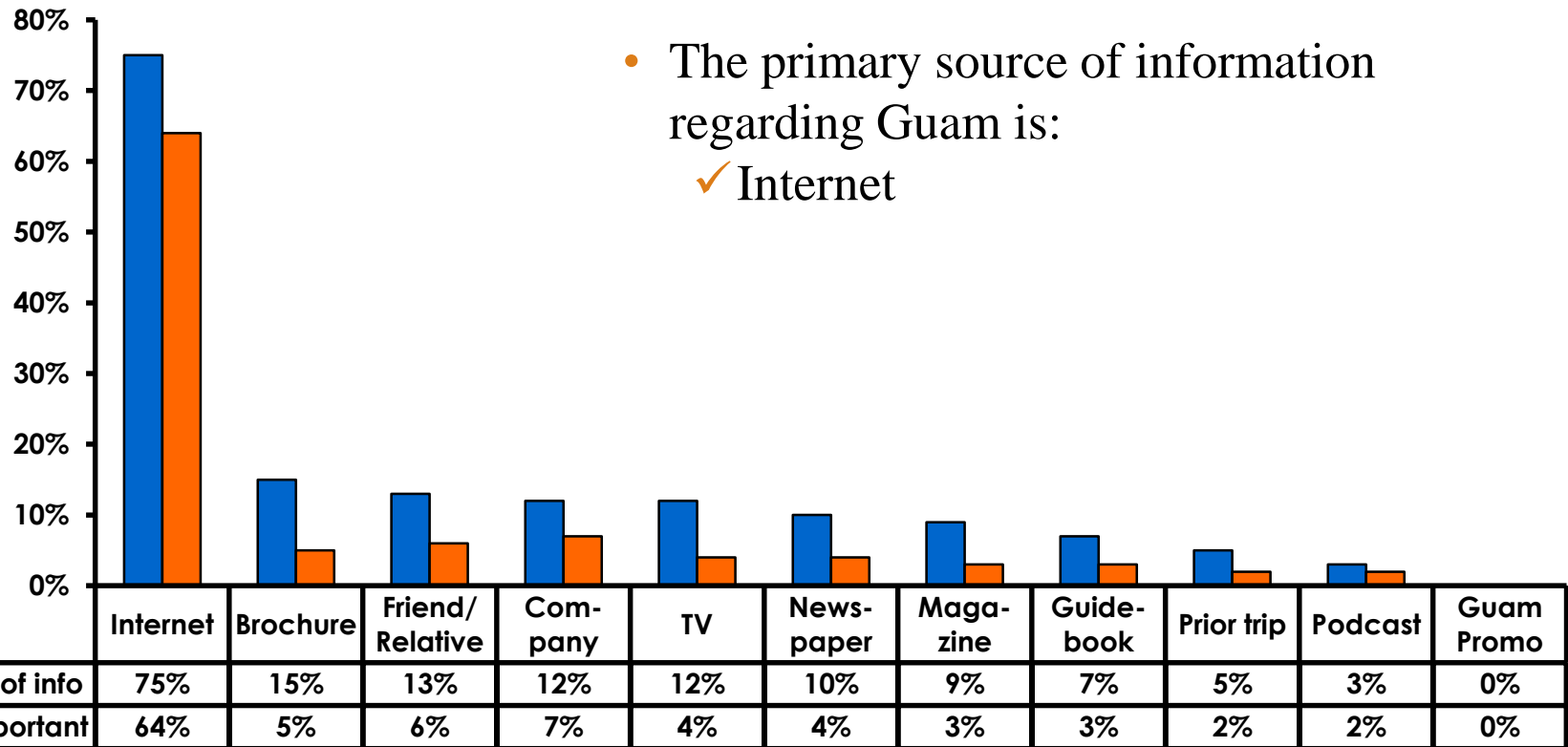
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days



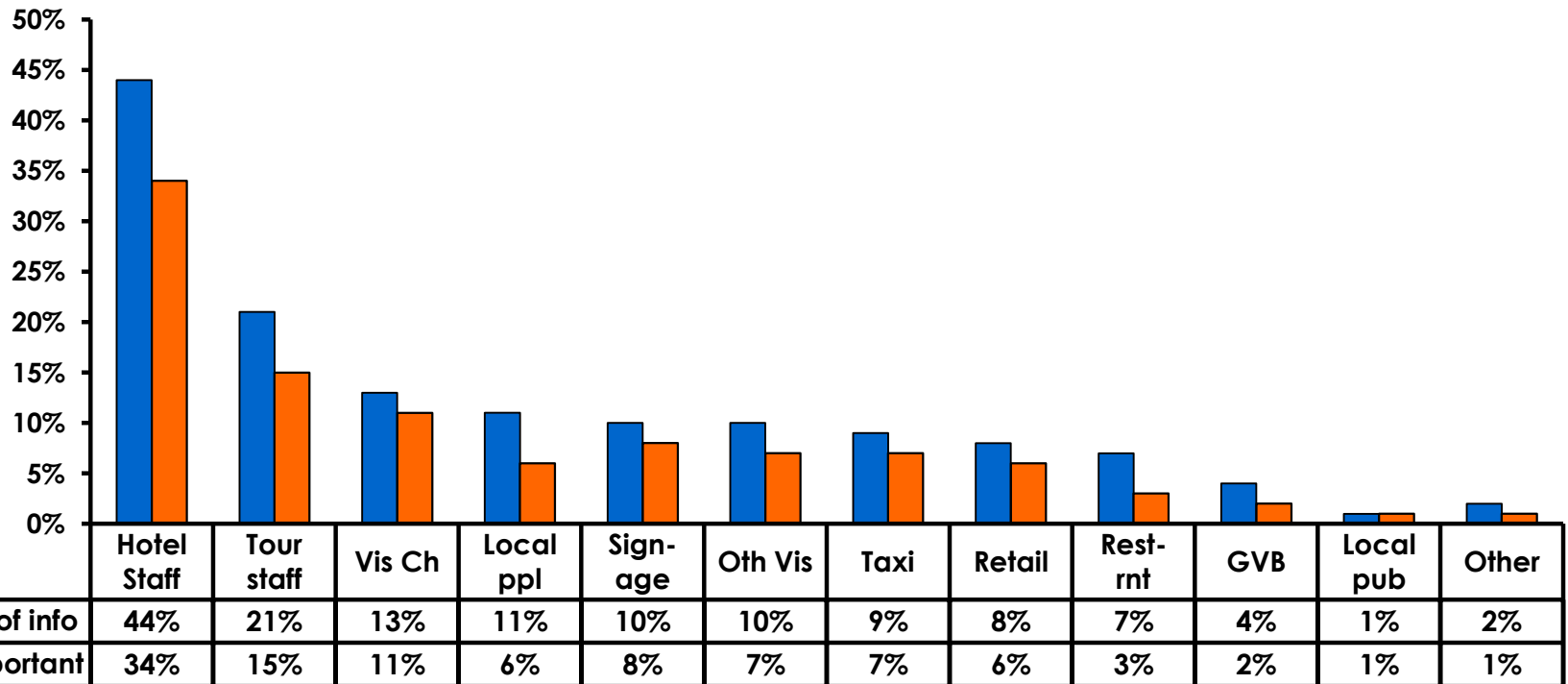
Sources of Information Pre-arrival



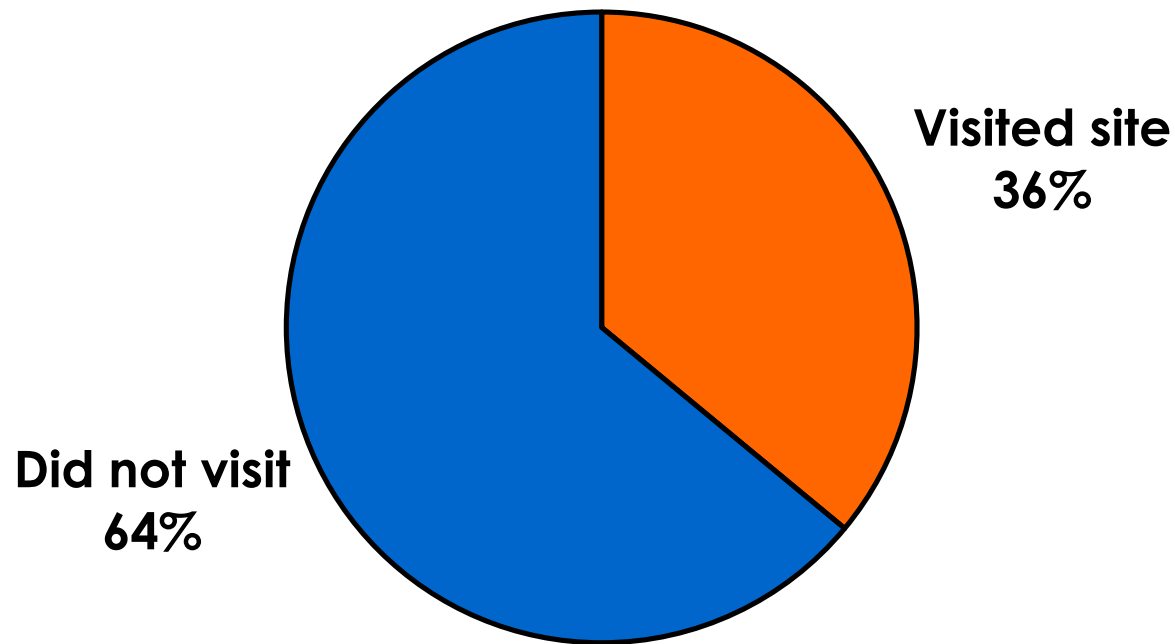
- The primary source of information regarding Guam is:
 - ✓ Internet

Sources of Information Post-arrival

- The primary local source of information are hotel staff members.

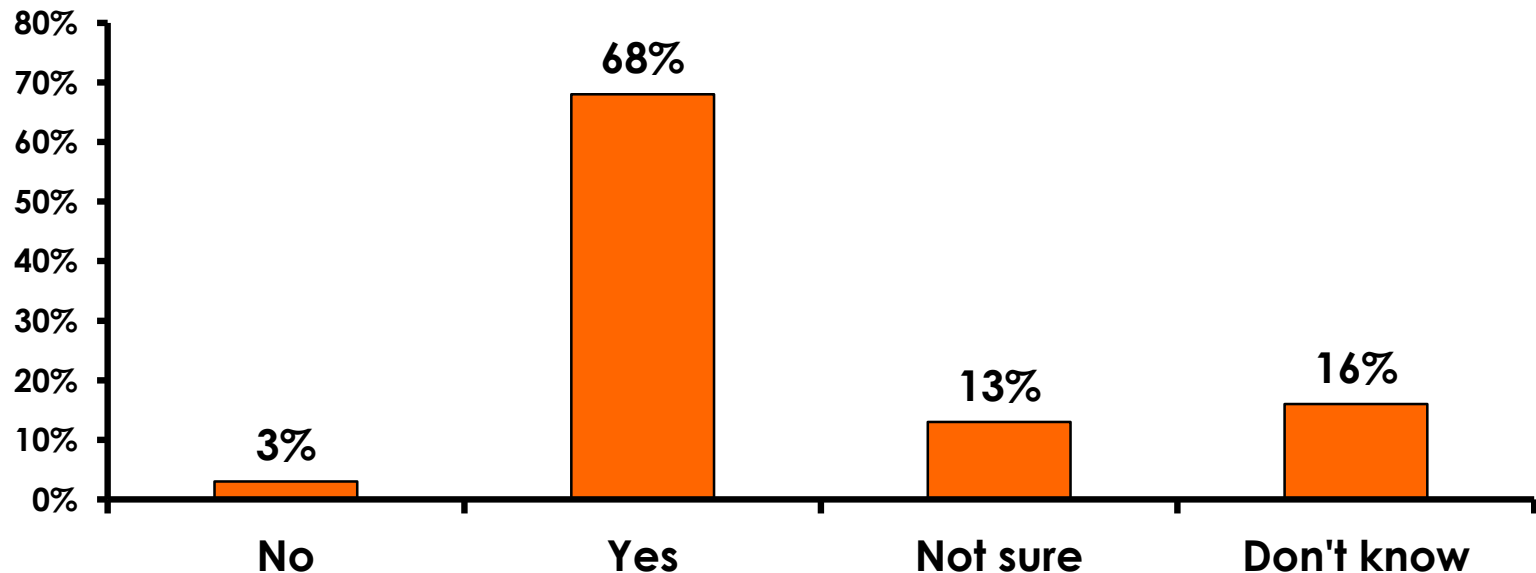


GVB Website



SECTION 6 **OTHER ISSUES**

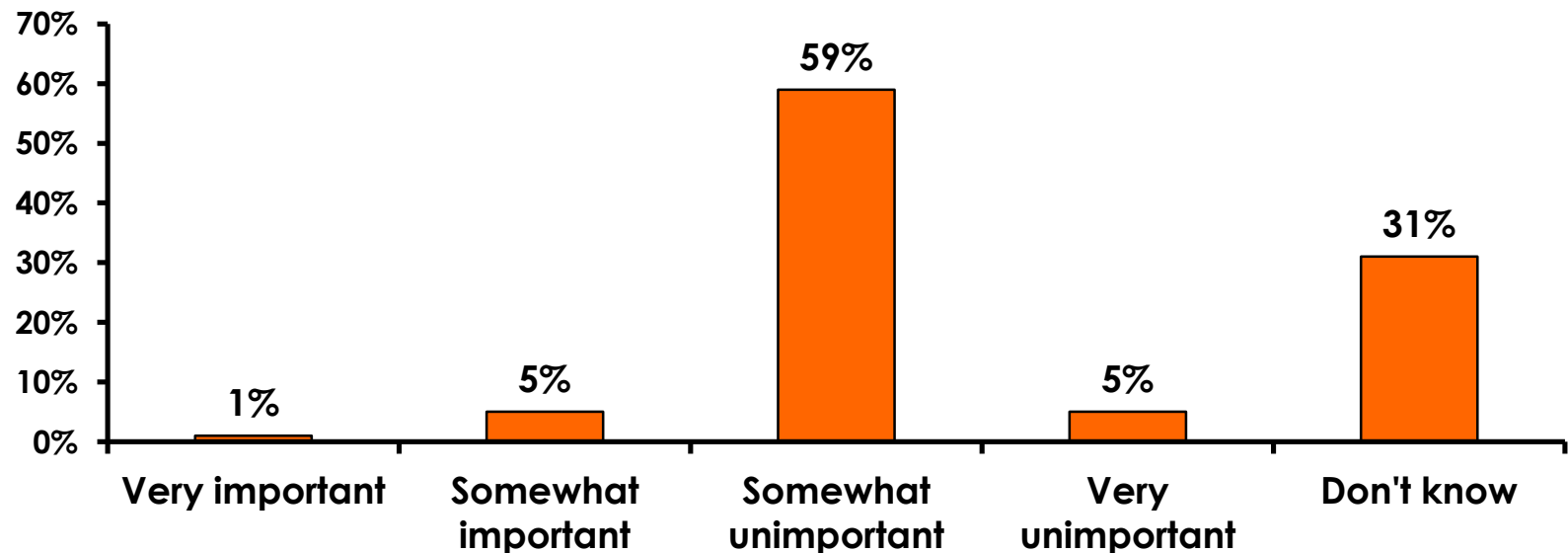
Good time to spend money on travel outside of Hong Kong



Good time to spend money on travel outside of Hong Kong by Age & Income

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<240K	240K-1.0M	1.0M-3.0M	3.0M+	Refused
Q.22	No		2%	5%			4%	3%			
	Yes		70%	68%	67%	60%	48%	68%	72%	60%	40%
	Not sure	100%	11%	15%	9%	17%	16%	15%	21%	20%	20%
	Do not know		17%	12%	24%	24%	32%	14%	7%	20%	40%
Total	Count	1	257	189	85	42	25	245	29	5	5

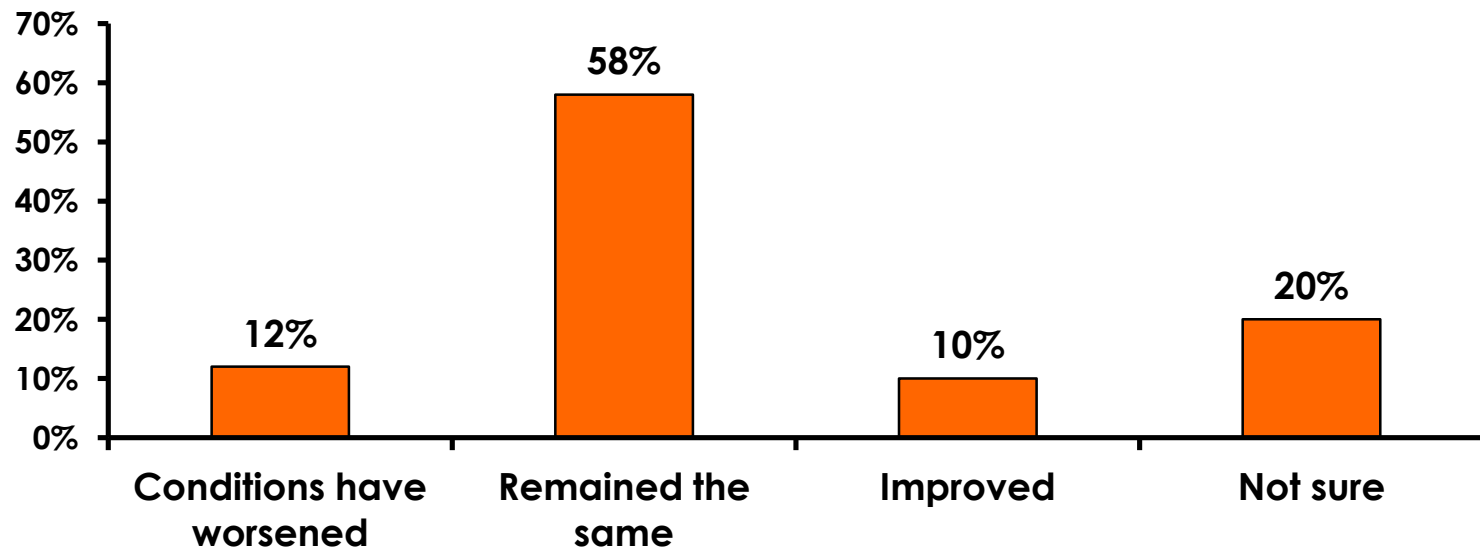
The importance of the state of the Hong Kong economy in decision to travel outside of Hong Kong



The importance of the state of the Hong Kong economy in decision to travel outside of Hong Kong by Age & Income

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<240K	240K-1.0M	1.0M-3.0M	3.0M+	Refused
Q.23	Very unimportant		6%	4%	5%	5%	16%	5%	14%		60%
	Somewhat unimportant		60%	59%	58%	51%	36%	57%	34%	40%	
	Somewhat important		4%	6%	4%	5%		7%	14%		
	Very important		0%	2%	2%		4%	1%	3%		
	Don't know	100%	30%	29%	31%	40%	44%	30%	34%	60%	40%
Total	Count	1	257	188	83	43	25	244	29	5	5

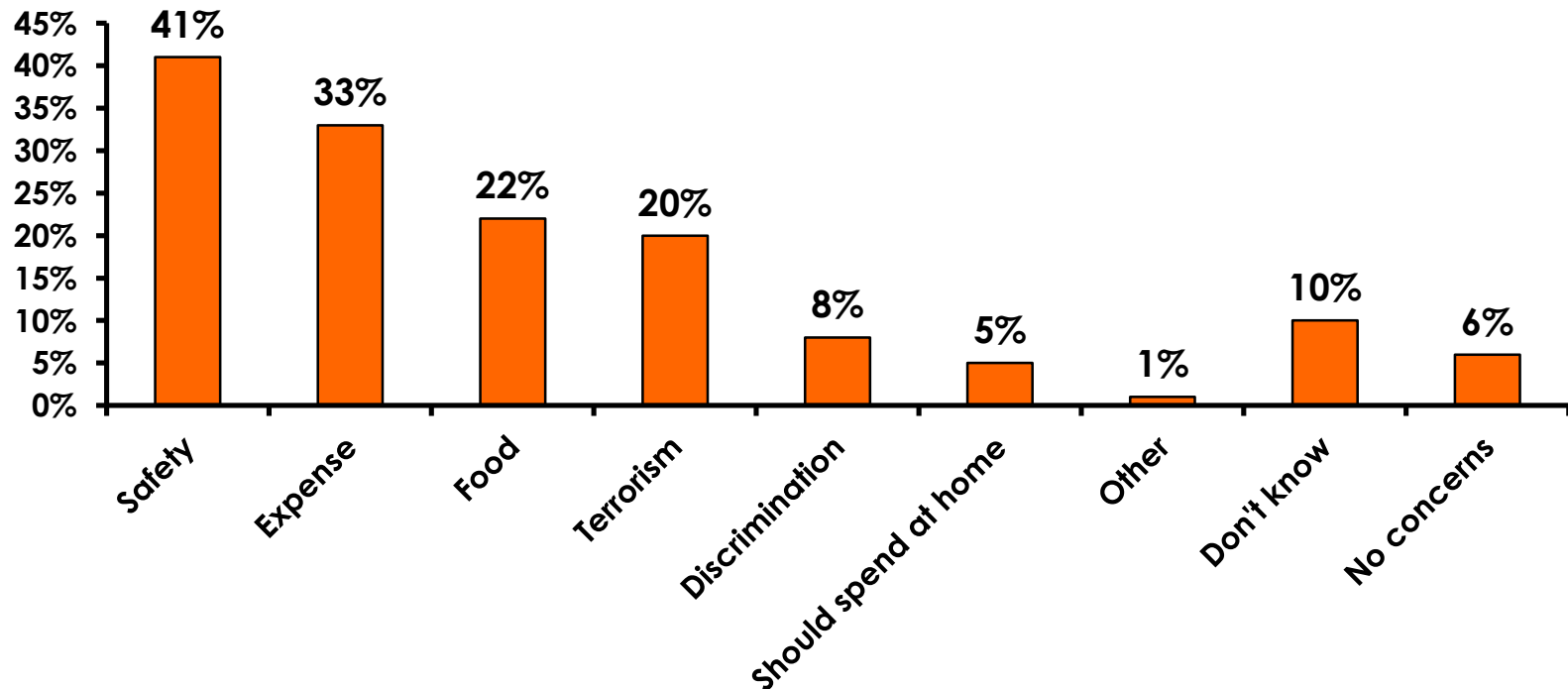
Rating Hong Kong Economy Compared to 12 months ago



Rating Hong Kong Economy Compared to 12 months ago by Age & Income

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<240K	240K-1.0M	1.0M-3.0M	3.0M+	Refused
Q.21	Conditions have worsened	100%	9%	16%	8%	7%	32%	15%	11%		60%
	Conditions have remained the same		58%	56%	65%	60%	36%	58%	43%	20%	40%
	Conditions have improved		9%	11%	8%	12%	12%	9%	32%		
	Do not know		23%	17%	18%	21%	20%	18%	14%	80%	
Total	Count	1	257	193	84	43	25	246	28	5	5

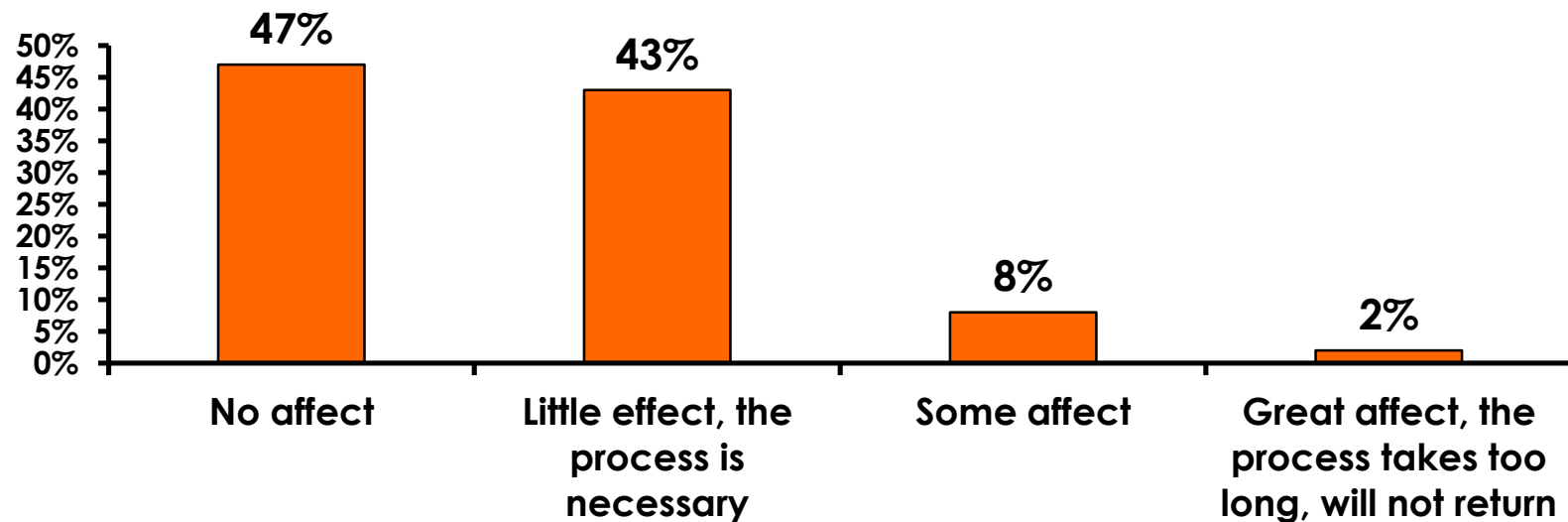
Concerns about travel outside of Hong Kong - Overall



Concerns about travel outside of Hong Kong - By Age & Income

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<240K	240K-1.0M	1.0M-3.0M	3.0M+	Refused
Q.24	Safety at my destination	100%	42%	38%	48%	30%	48%	40%	54%	80%	100%
	Expense	100%	34%	35%	26%	26%	56%	38%	39%	60%	20%
	Food	100%	19%	26%	19%	19%	40%	22%	25%		20%
	Terrorism	100%	18%	23%	14%	30%	24%	23%	32%	20%	40%
	Don't know		12%	8%	7%	9%	20%	8%	11%		
	Discrimination against Hong Kong	100%	7%	8%	6%	5%	8%	9%	11%		20%
	No concerns		7%	7%	5%	5%		7%	7%		
	Spending money abroad when it should be spent at home	100%	3%	6%	6%	2%	4%	4%	7%		20%
	Other		0%	2%	1%	2%		1%	7%		
Total	Cases	1	259	191	84	43	25	247	28	5	5

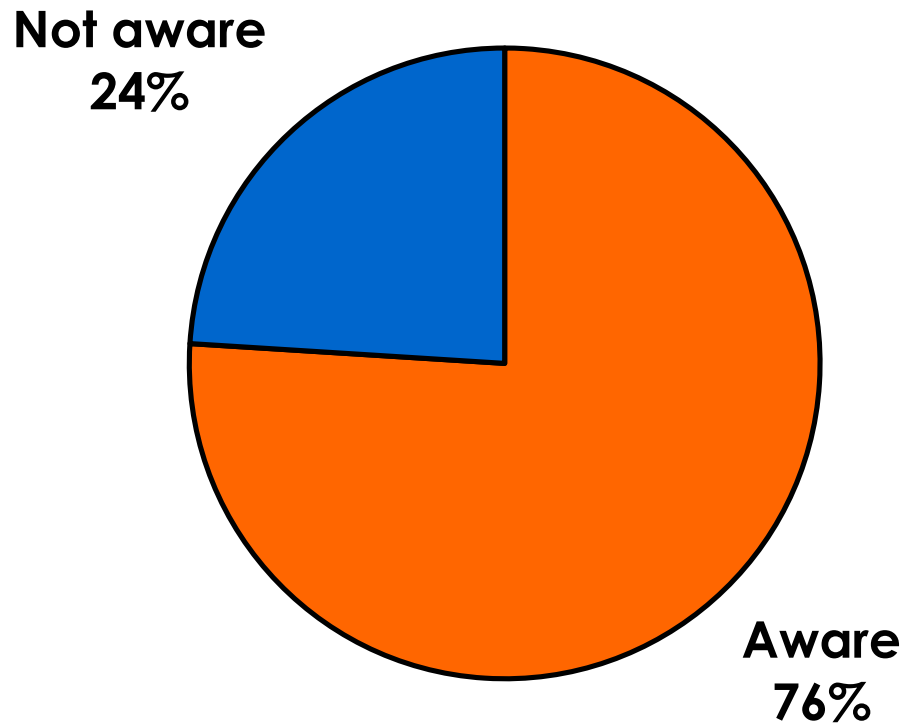
Security Screening/ Immigration Process at Guam International Airport



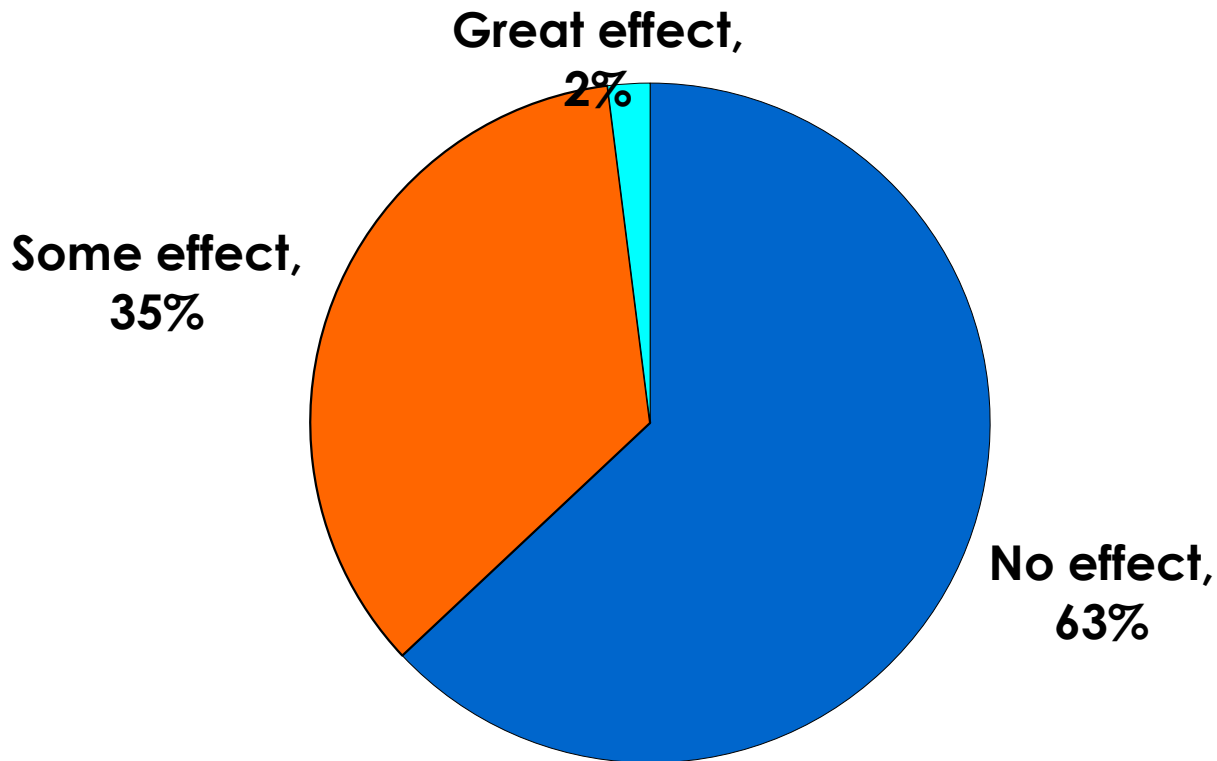
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **3.9** out of possible 7.0
- Agree (Score 6-7) – **14%**
- Neutral (Score 4-5) – **43%**
- Disagree (Score 1-3) – **42%**

Awareness of U.S. Military troops moving from Japan to Guam



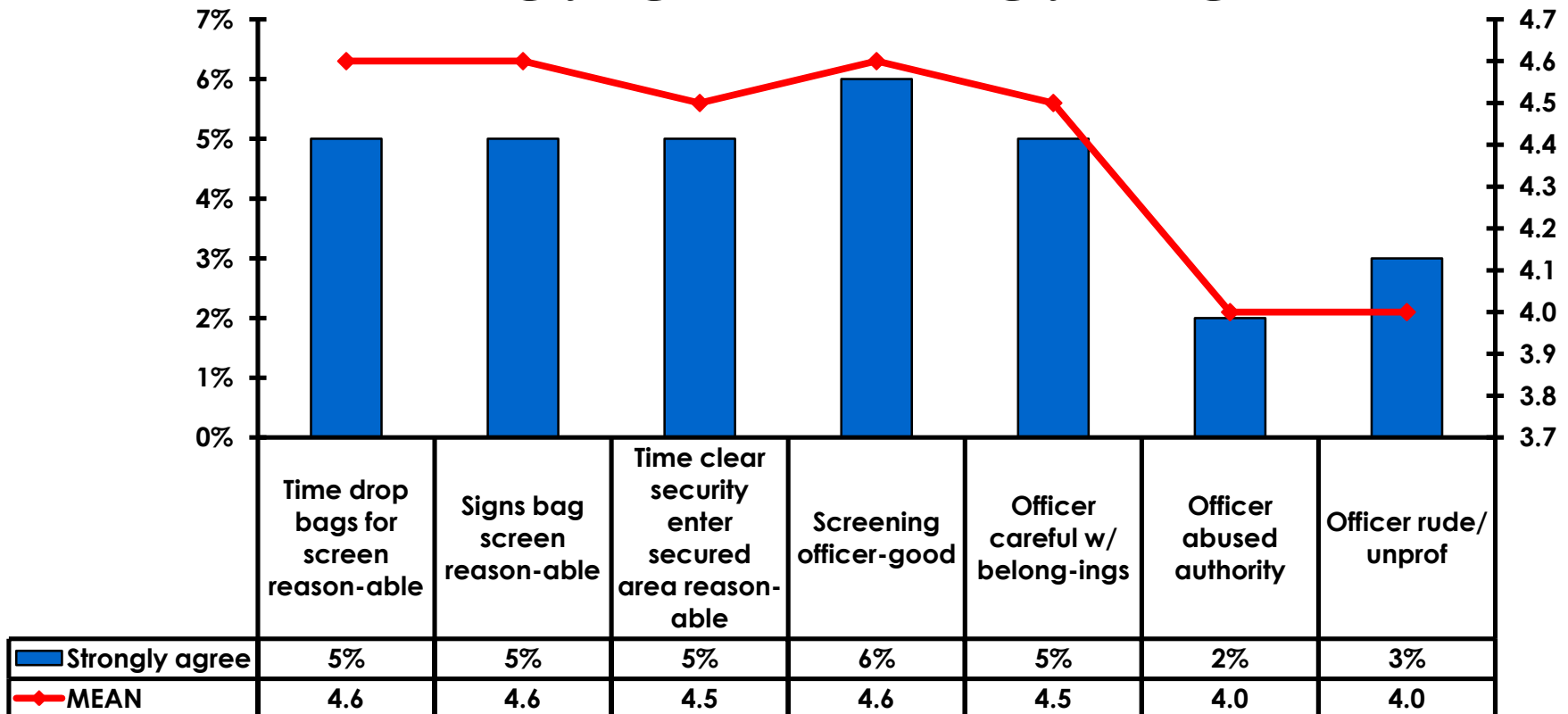
Effects of U.S. military troop movement on future trips to Guam



Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



Likelihood of travel outside of HK within the next 6 to 24 months

