



GUAM VISITORS BUREAU

Hong Kong Visitor Tracker Exit Profile

1st QTR FY2012



Prepared by: QMark Research

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Background & Methodology

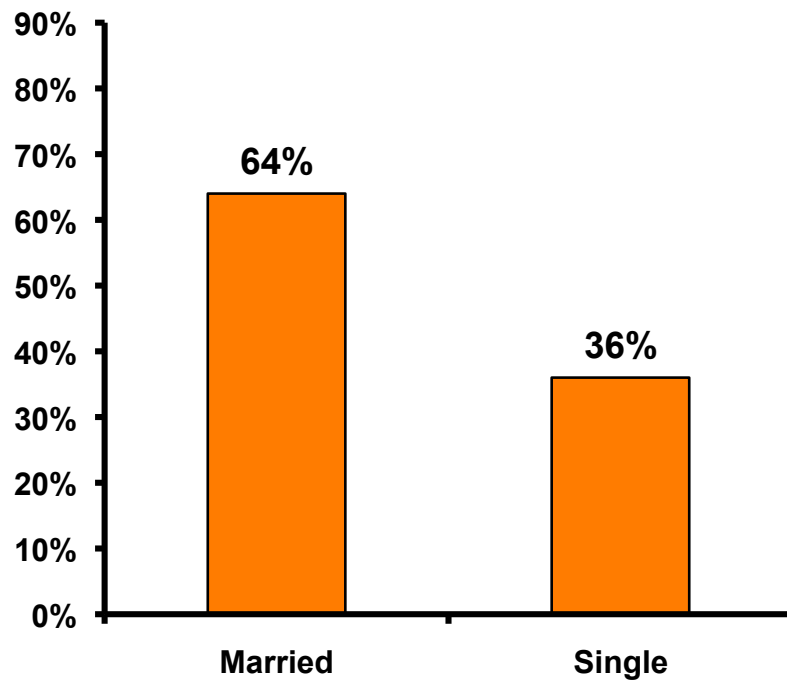
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Chinese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **150** departing Hong 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 **150** is +/- 8.00 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 +/- 8.00 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.

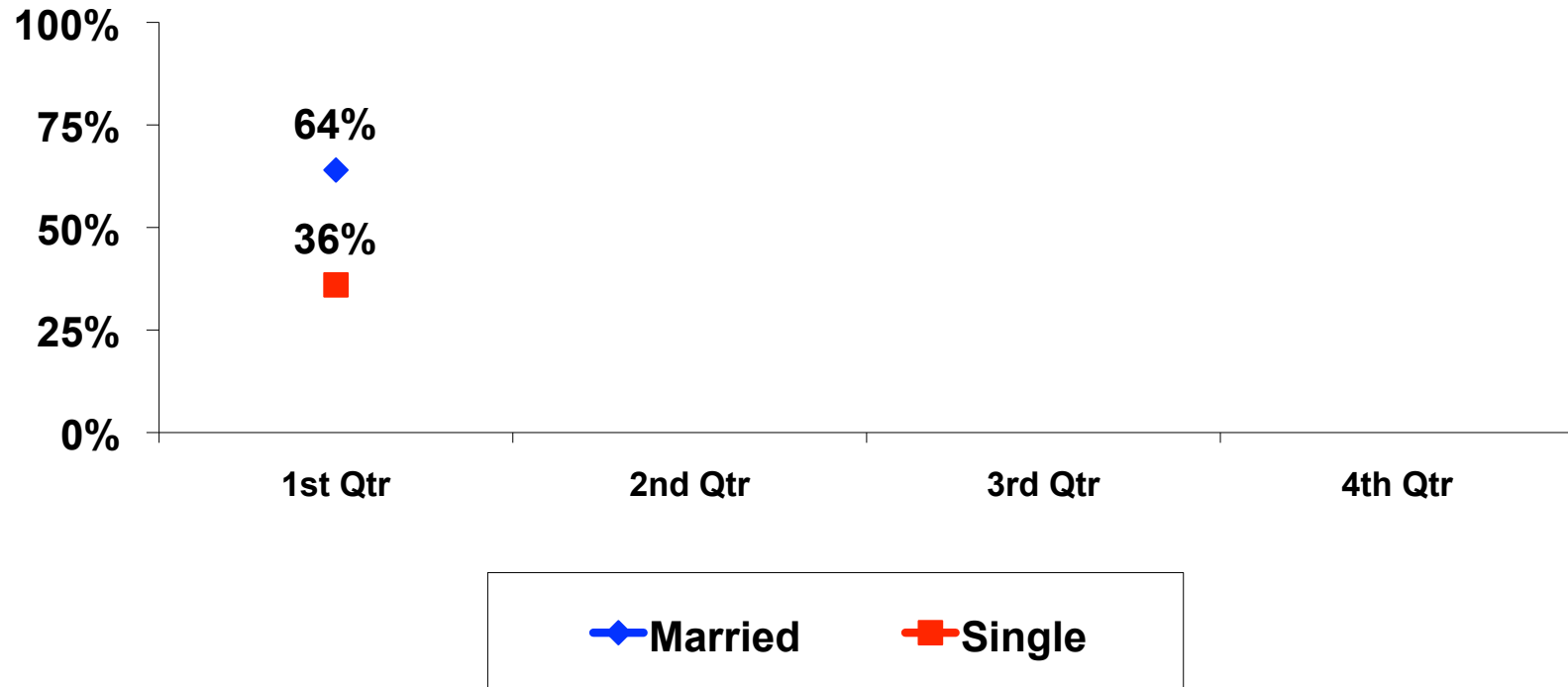
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

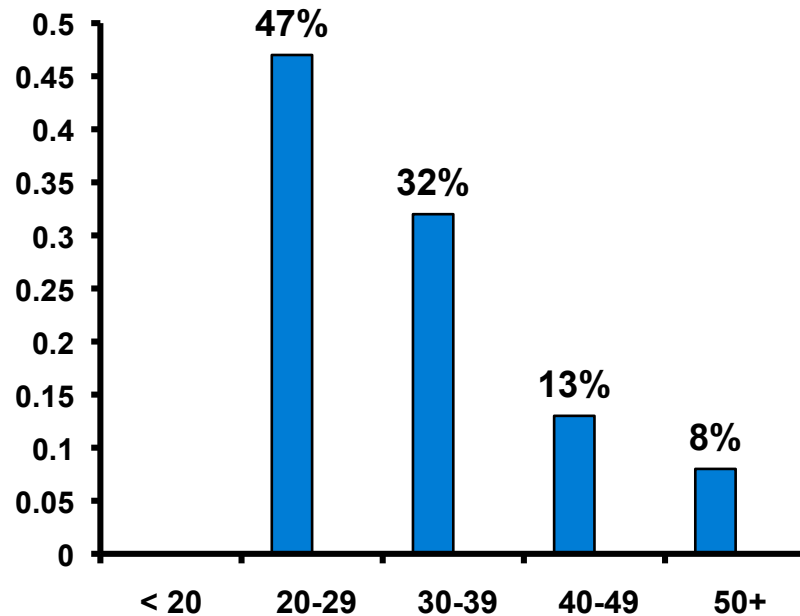


- A majority of visitors are married.

Marital Status

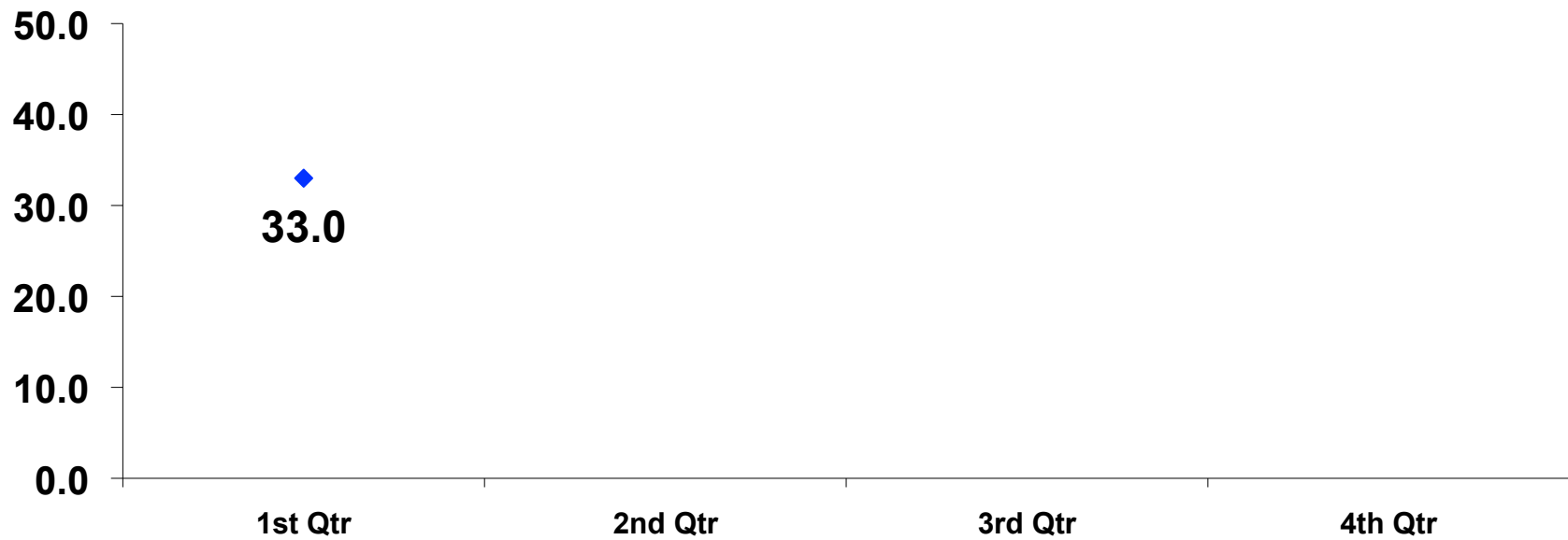


Age - Overall

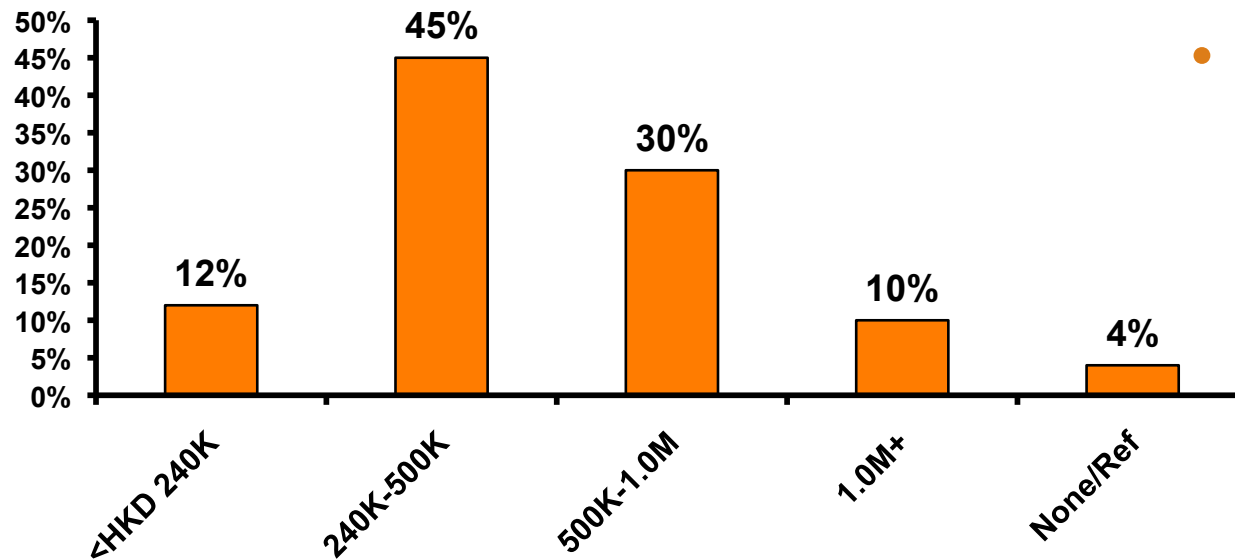


- The average age of the respondents is 33.0 years of age.

Average Age

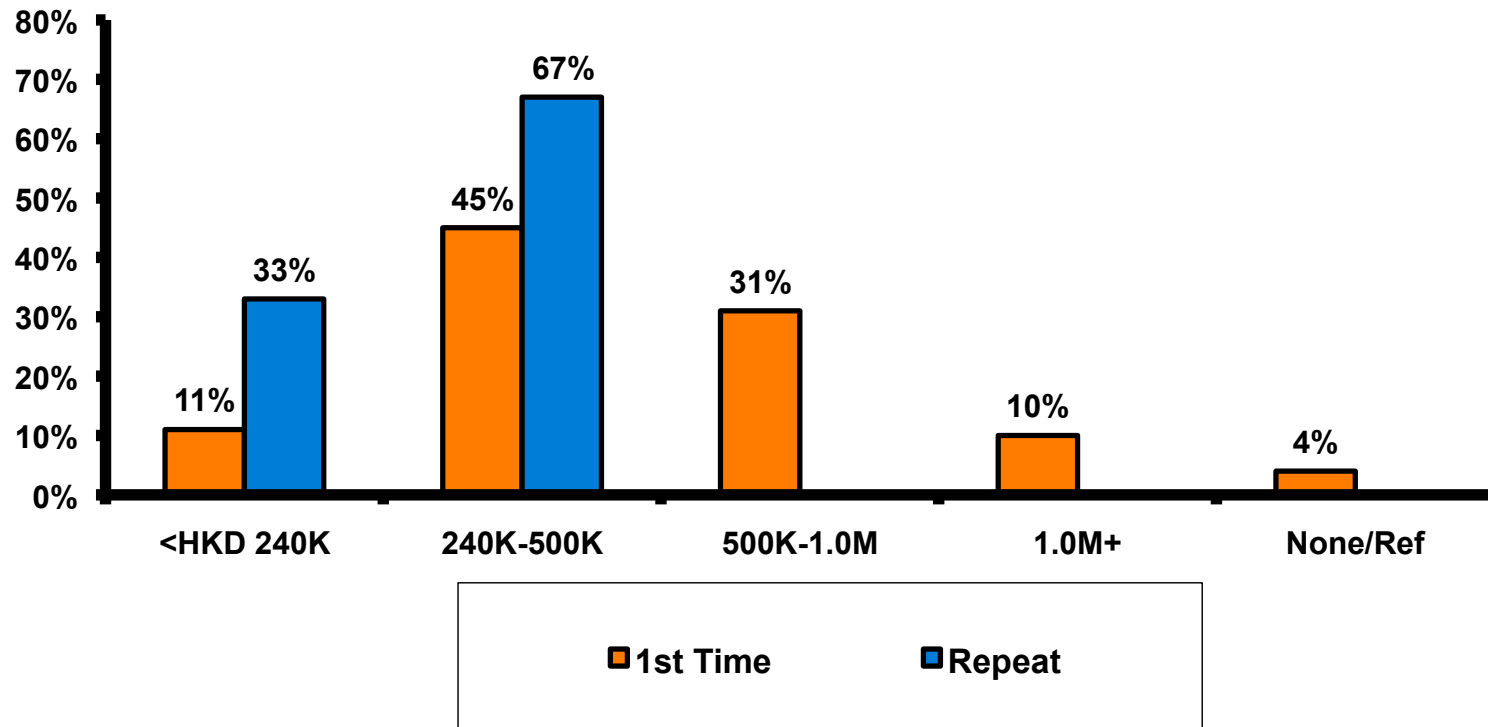


Personal Income



• HKD 7.77=\$1

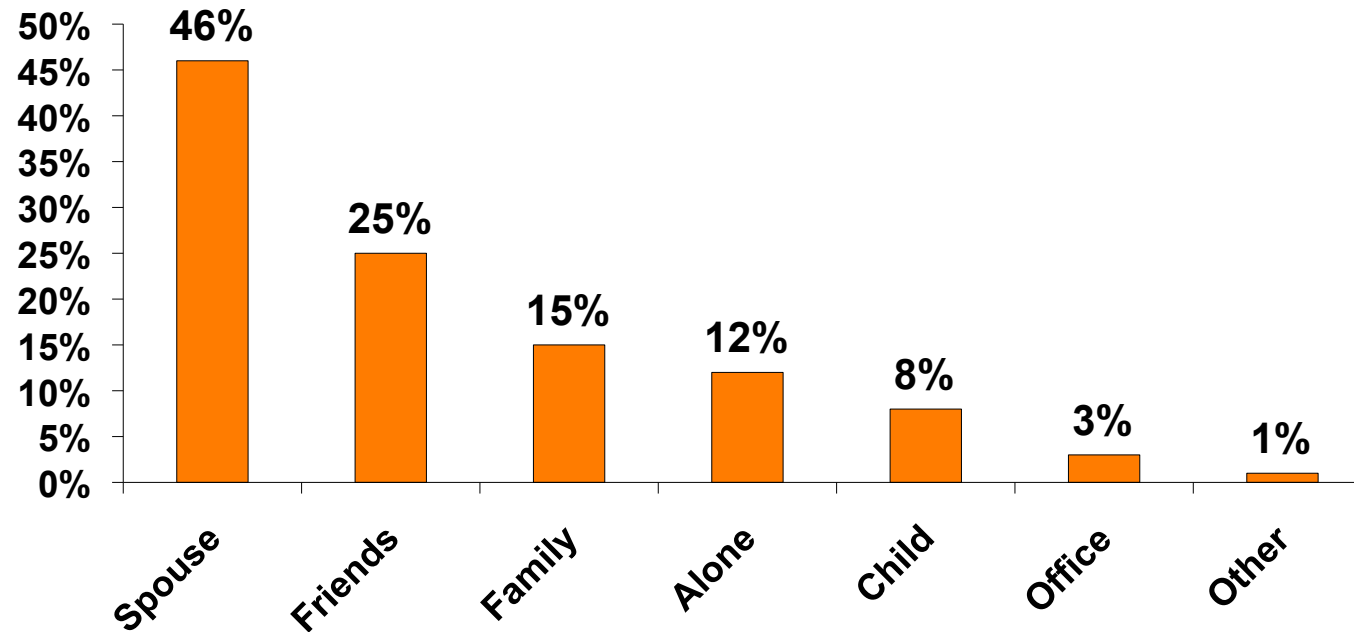
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
				Male	Female	20-29	30-39	40-49	50+
PERSONAL INCOME	<240K	Count	12	11	1	6	2	2	2
			12%	18%	2%	15%	5%	13%	29%
	240K-1.0M	Count	78	40	38	30	31	10	3
			75%	67%	86%	73%	84%	67%	43%
	1.0M-3.0M	Count	10	8	2	4	4	1	1
			10%	13%	5%	10%	11%	7%	14%
	Refused	Count	4	1	3	1		2	1
			4%	2%	7%	2%		13%	14%
Total	Count		104	60	44	41	37	15	7

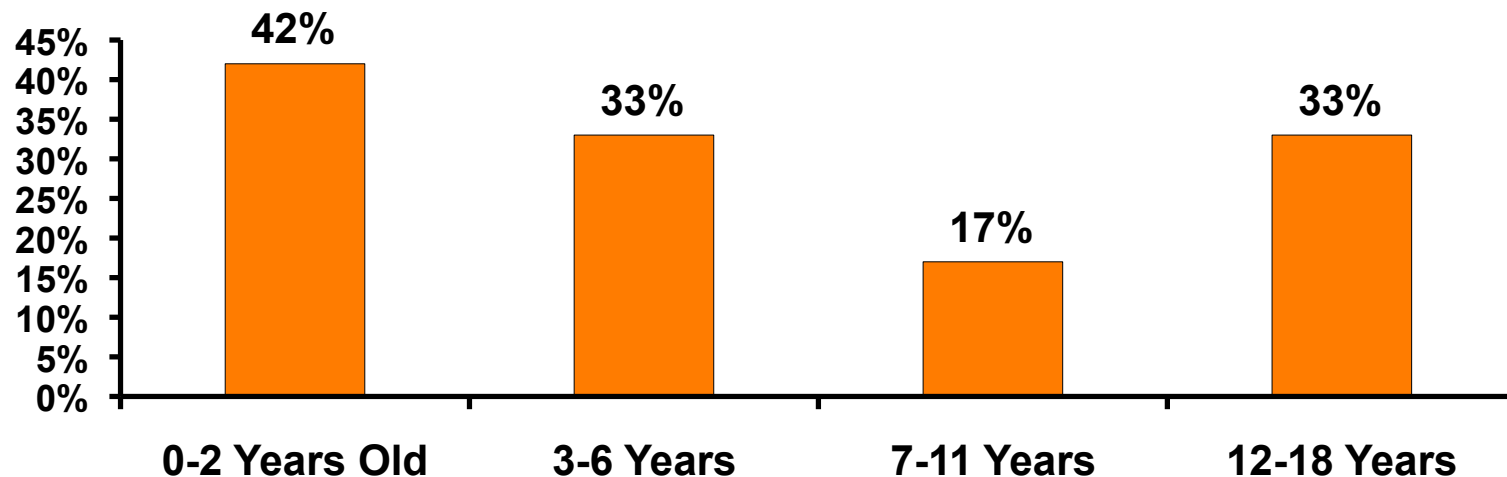
Travel Companions



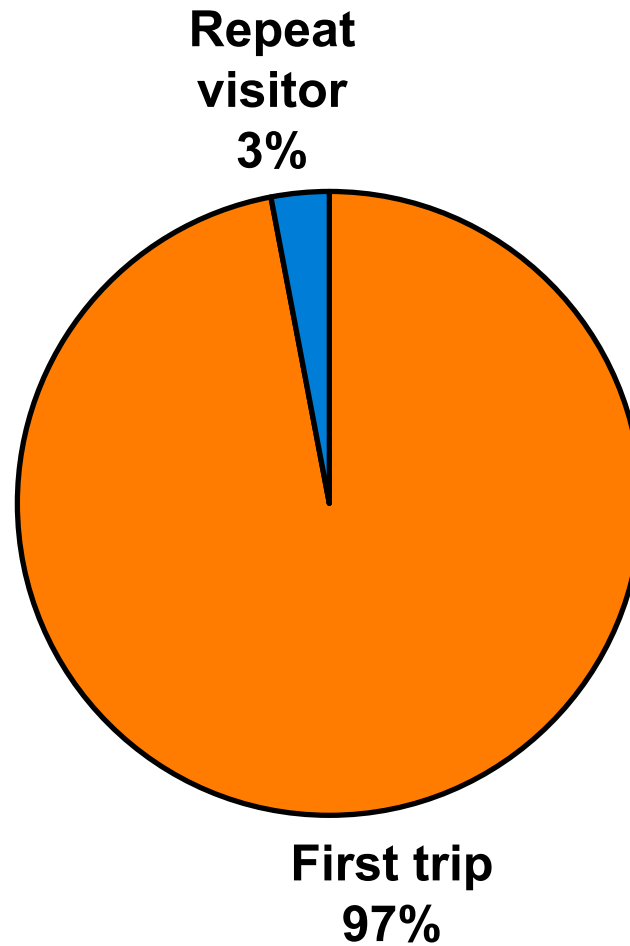
Number of Children Travel Party

N=12 total respondents traveling with children.

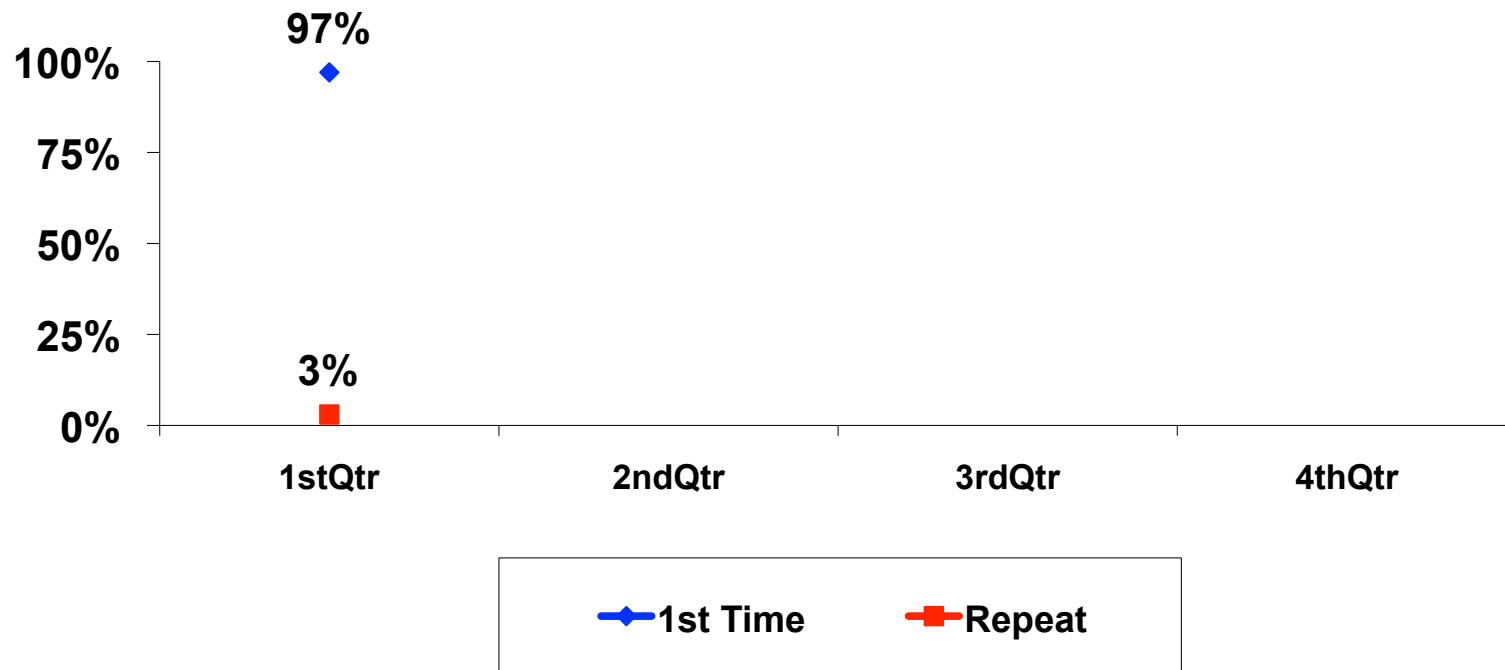
(Of those N=12 respondents, there is a total of 16 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



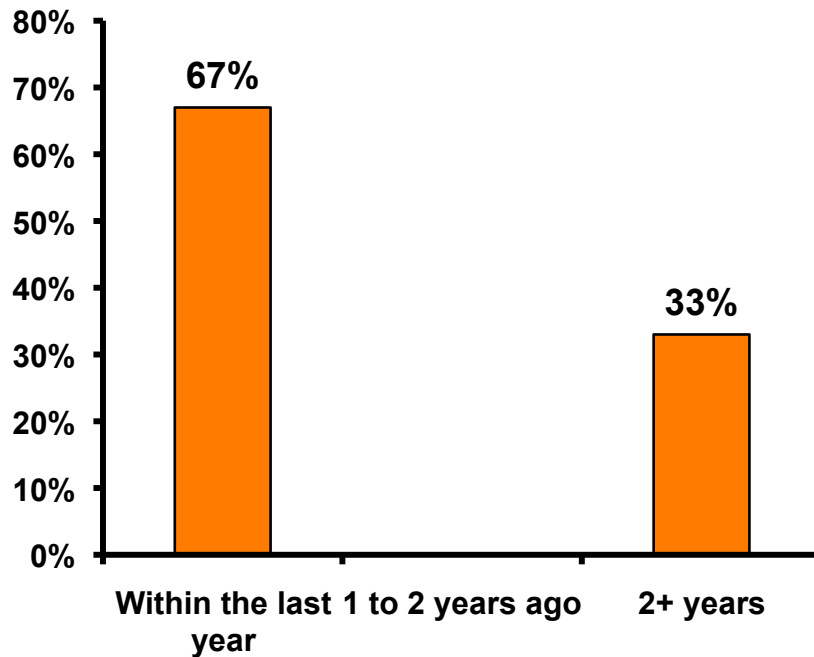
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	82	80	2
			55%	55%	50%
	Female	Count	67	65	2
			45%	45%	50%
Total		Count	149	145	4
AGE	20-29	Count	66	64	2
			47%	47%	50%
	30-39	Count	45	44	1
			32%	32%	25%
	40-49	Count	18	18	
			13%	13%	
	50+	Count	11	10	1
			8%	7%	25%
Total		Count	140	136	4

- Few visitors from HK have been to Guam previously.

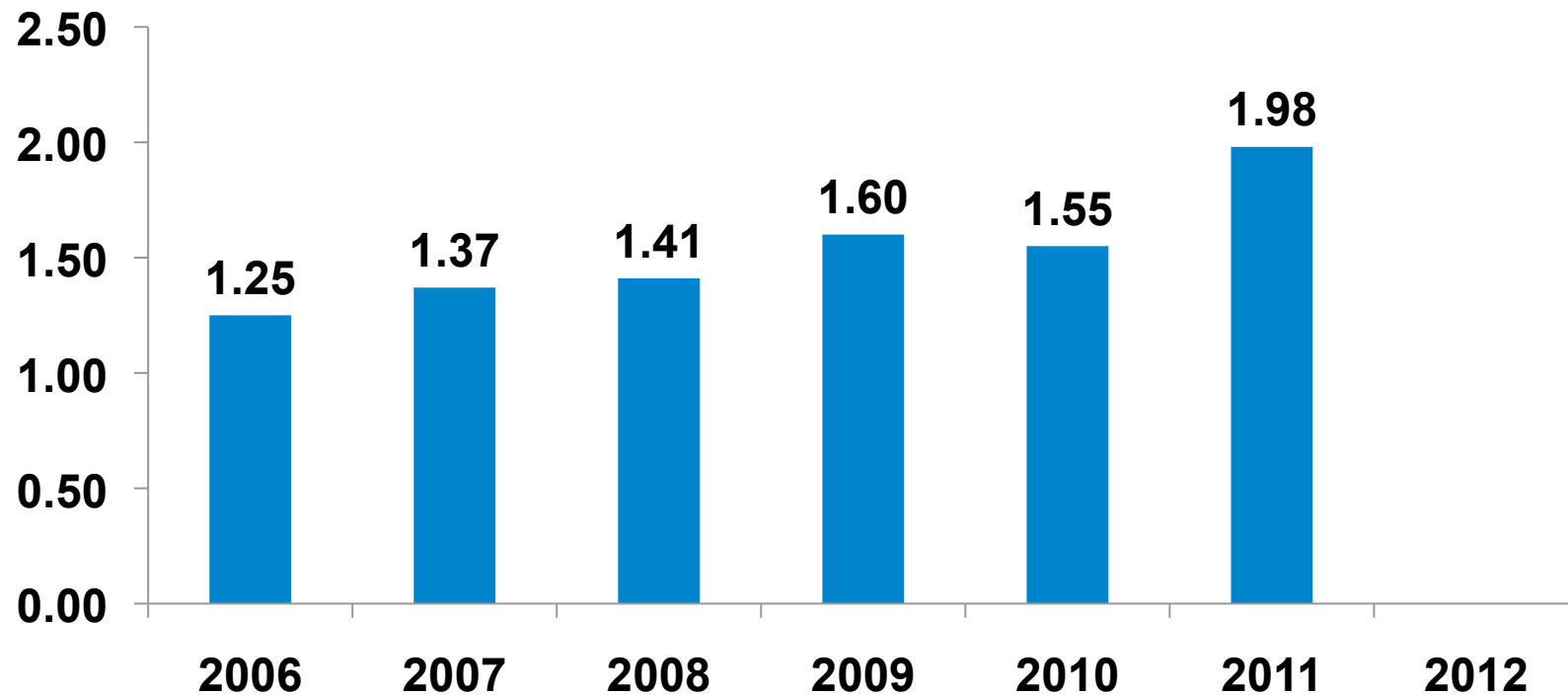
Repeat Visitors Last Trip

n = 3



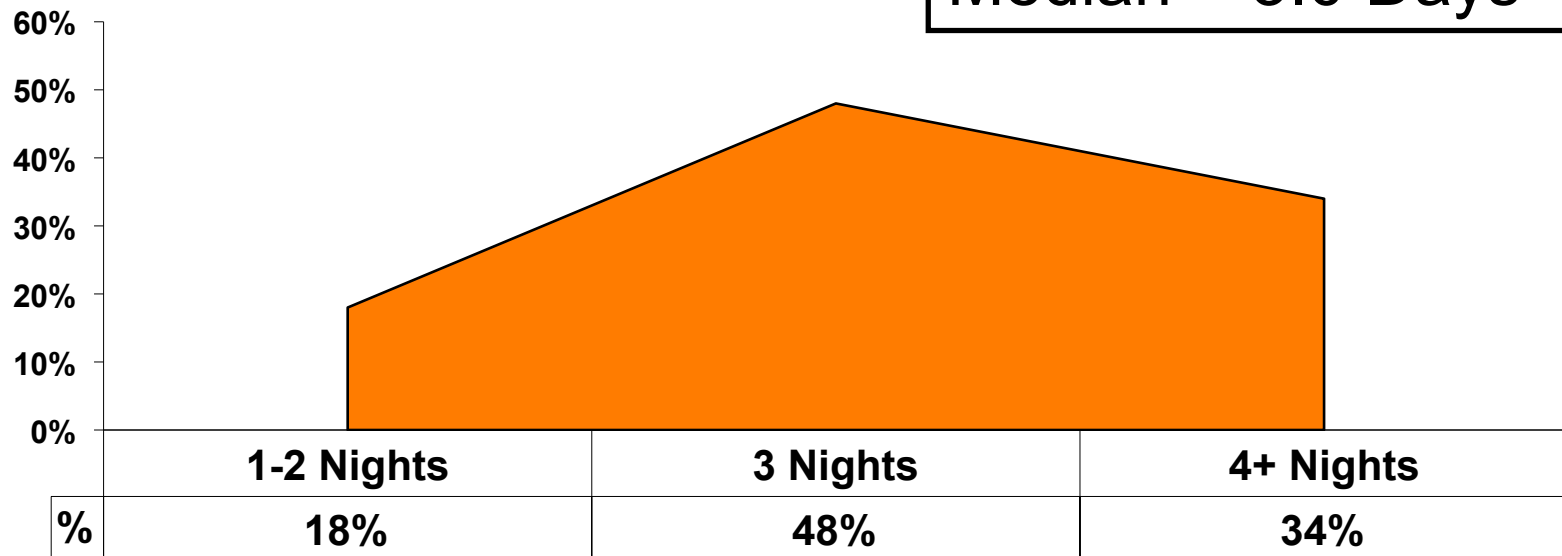
- The average repeat visitor has been to Guam 4.0 times.

Average Number Overnight Trips (2006-2012) (2 nights or more)

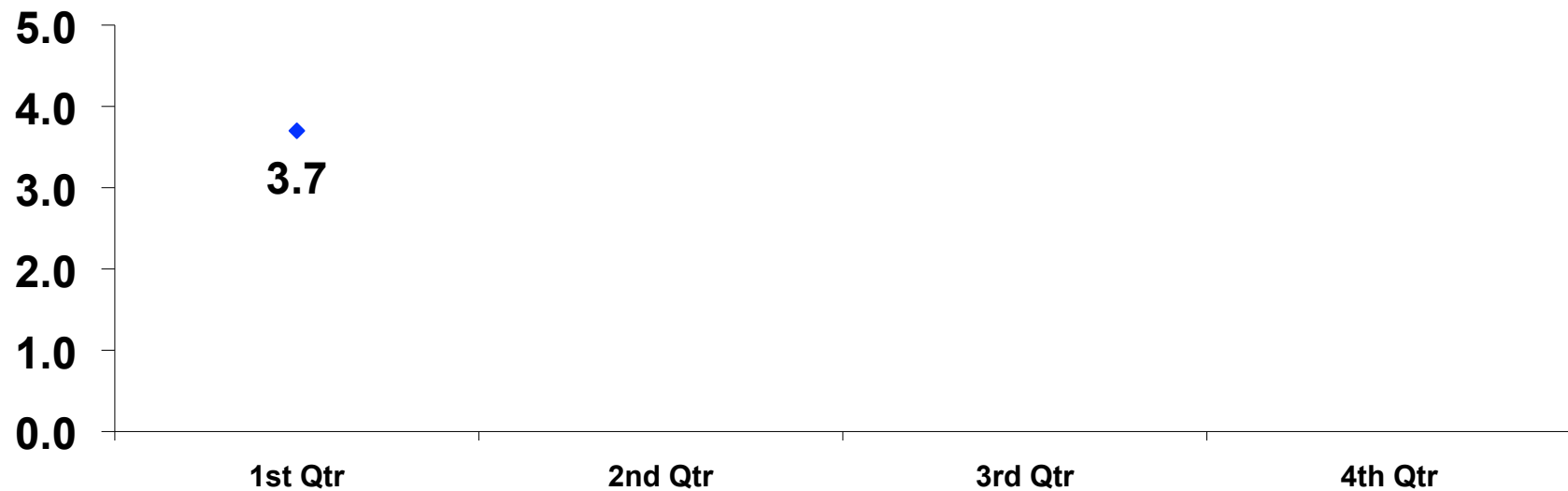


Length of Stay

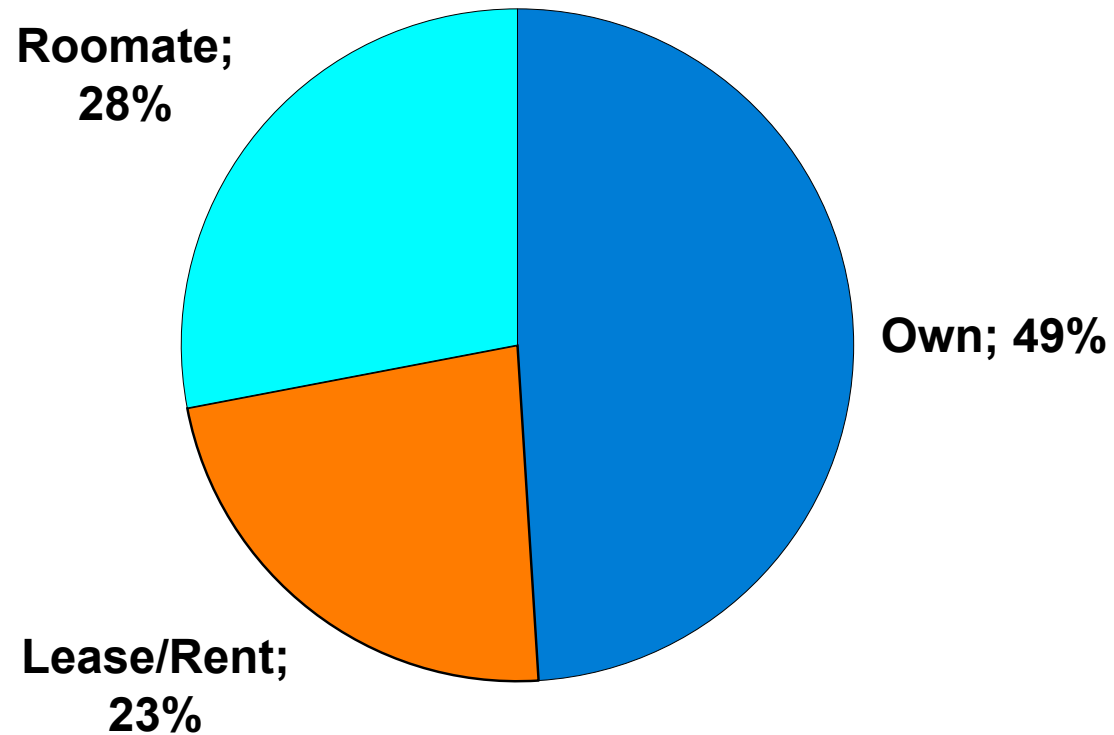
Mean = 3.70 Days
Median = 3.0 Days



Average Length of Stay



Living Accommodations

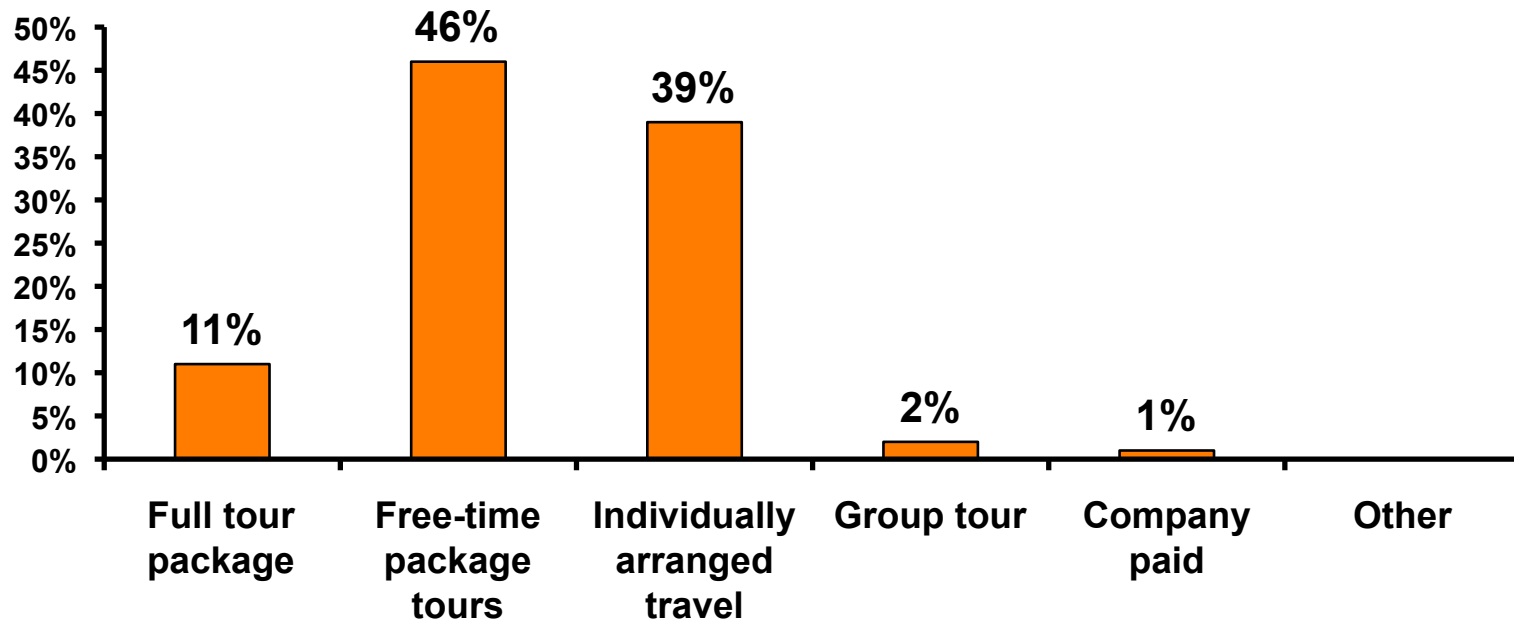


Occupation by Income

		TOTAL	PERSONAL INCOME			
			<240K	240K-1.0M	1.0M-3.0M	Refused
Q.33	Comp Emp-Office worker	41%	50%	42%	11%	
	Professional/ Specialist	16%	8%	19%	33%	
	Comp Emp- Salesperson	15%	17%	12%	11%	33%
	Govt-Manager/Exec	7%		6%	22%	
	Free-lancer	7%		6%		
	Other	6%	8%	5%	11%	
	Retired	3%		3%		67%
	Govt-office worker	2%		4%		
	Student	2%	17%	1%		
	Govt- Executive	1%			11%	
	Skilled worker	1%		1%		
Total	Count	123	12	77	9	3

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

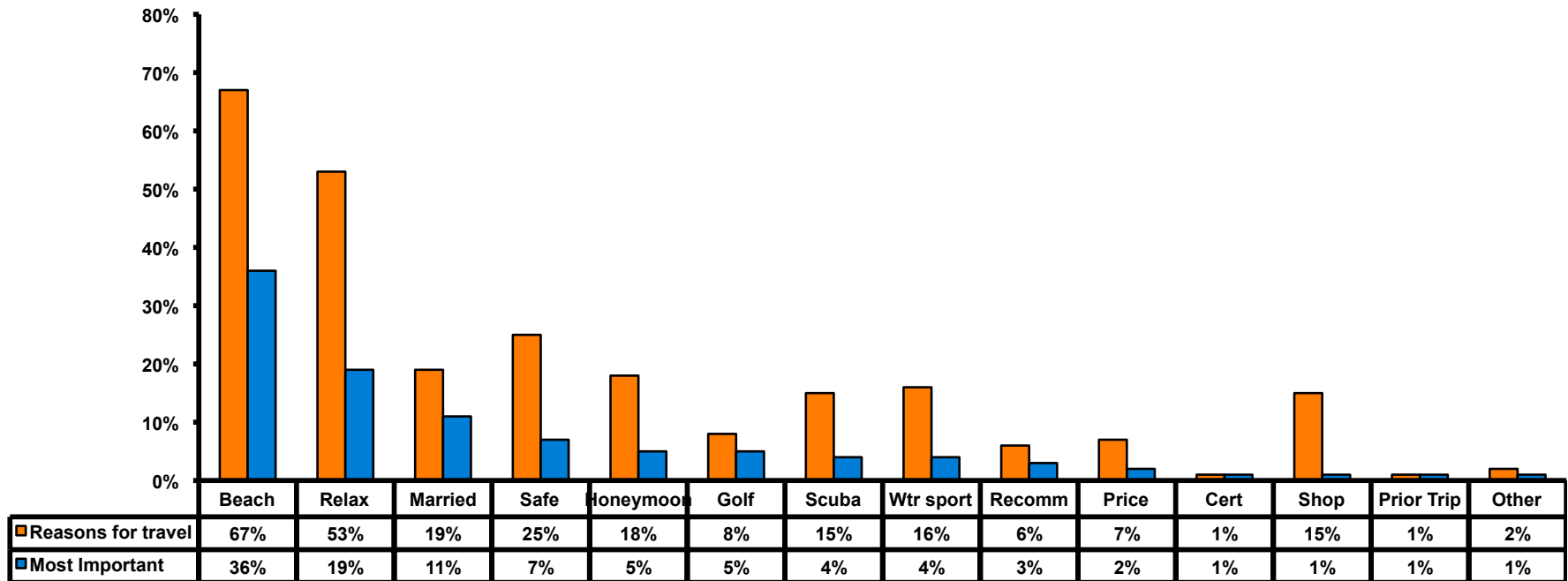


Accommodation by Income

Average length of stay: 3.70 days

	TOTAL	PERSONAL INCOME			
		<240K	240K-1.0M	1.0M-3.0M	Refused
Q.9 Hilton Guam Resort & Spa	22%	27%	21%	10%	
Pacific Islands Club PIC	18%		15%	10%	
Fiesta Resort Guam	12%	27%	13%	20%	50%
Sheraton Laguna Resort	13%	18%	14%	10%	25%
Guam Marriott Resort Hotel	8%	9%	9%		
Hyatt Regency Guam	6%		4%	10%	
Outrigger Guam Resort	4%		5%	10%	
The Westin Resort Guam	4%		4%	10%	
Holiday Resort Guam	3%		4%		25%
Hotel Nikko Guam	2%		4%		
Bayview Hotel	2%		4%		
Guam Plaza Hotel	1%		1%	10%	
Royal Orchid Guam	1%	9%	1%		
Grand Plaza Hotel	1%		1%		
Relatives, Friends, Home Stay	1%			10%	
Tumon Bay Capital Hotel	1%	9%			
Onward Beach Resort	1%				
Hotel Sane Fe	1%				
Total Count	148	11	78	10	4

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
 - The desire to relax and
 - To attend a wedding/ get married
- are the three reasons mentioned most often as the most important reason for this particular trip.

Motivation by Age & Gender

	TOTAL	AGE				GENDER	
		20-29	30-39	40-49	50+	Male	Female
Q.5 Beautiful seas, beaches, tropical climate	67%	67%	71%	61%	64%	63%	72%
Just to relax	53%	56%	58%	50%	18%	60%	45%
It is a safe place to spend a vacation	25%	24%	24%	33%	9%	24%	25%
To get married or Attend wedding	19%	15%	27%	11%	36%	17%	22%
Honeymoon	18%	21%	24%	6%		18%	18%
Water sports	16%	17%	16%	11%	27%	22%	9%
Shopping	15%	14%	13%	22%	18%	16%	13%
SCUBA diving	15%	17%	16%	11%		15%	15%
To golf	8%	8%	9%	11%	9%	10%	6%
Price of the tour package	7%	8%	4%	17%		6%	7%
Recommendation of friend, relative, travel agency	6%	3%	7%		9%	5%	7%
Short travel time	4%	5%	2%	6%		4%	4%
Pleasure	3%	3%	4%			4%	3%
To visit friends or relatives	3%		2%	6%	18%	4%	1%
Other	2%		7%			1%	3%
Company or Business trip	1%		2%	6%			3%
Career certification or testing	1%	3%				1%	1%
A previous visit	1%	2%					1%
My company sponsored me	1%			6%			1%
Convention, Conference, Trade show	1%				9%	1%	
Total Cases	149	66	45	18	11	82	67

Motivation by Income

	TOTAL	PERSONAL INCOME			
		<240K	240K-1.0M	1.0M-3.0M	Refused
Q.5 Beautiful seas, beaches, tropical climate	67%	75%	67%	70%	75%
Just to relax	53%	50%	59%	50%	50%
It is a safe place to spend a vacation	25%	17%	29%	30%	
To get married or Attend wedding	19%	8%	27%	10%	
Honeymoon	18%	17%	23%	10%	50%
Water sports	16%	17%	18%	30%	
SCUBA diving	15%		18%	10%	
Shopping	15%	17%	9%	40%	25%
To golf	8%		9%		
Price of the tour package	7%	8%	6%	10%	25%
Recommendation of friend, relative, travel agency	6%		5%	30%	
Short travel time	4%		4%		25%
Pleasure	3%		5%	10%	
To visit friends or relatives	3%		1%	10%	
Other	2%	8%	3%		
Company or Business trip	1%		3%		
Career certification or testing	1%		3%		
My company sponsored me	1%		1%		
Convention, Conference, Trade show	1%			10%	
A previous visit	1%				
Total Cases	149	12	78	10	4

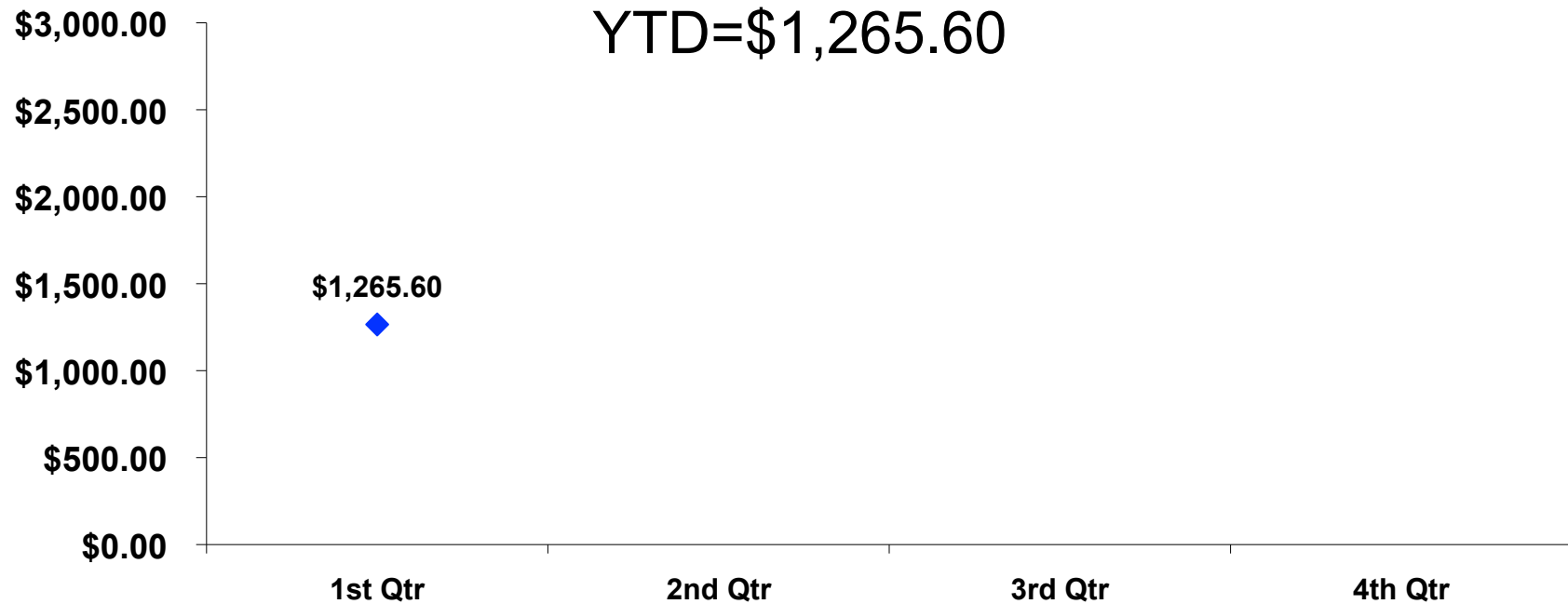
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

HKD 7.77/US\$1

- \$2,404.00 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$9,523 = maximum (highest amount recorded for the entire sample)
- \$1,265.60 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

HKD 7.77=\$1

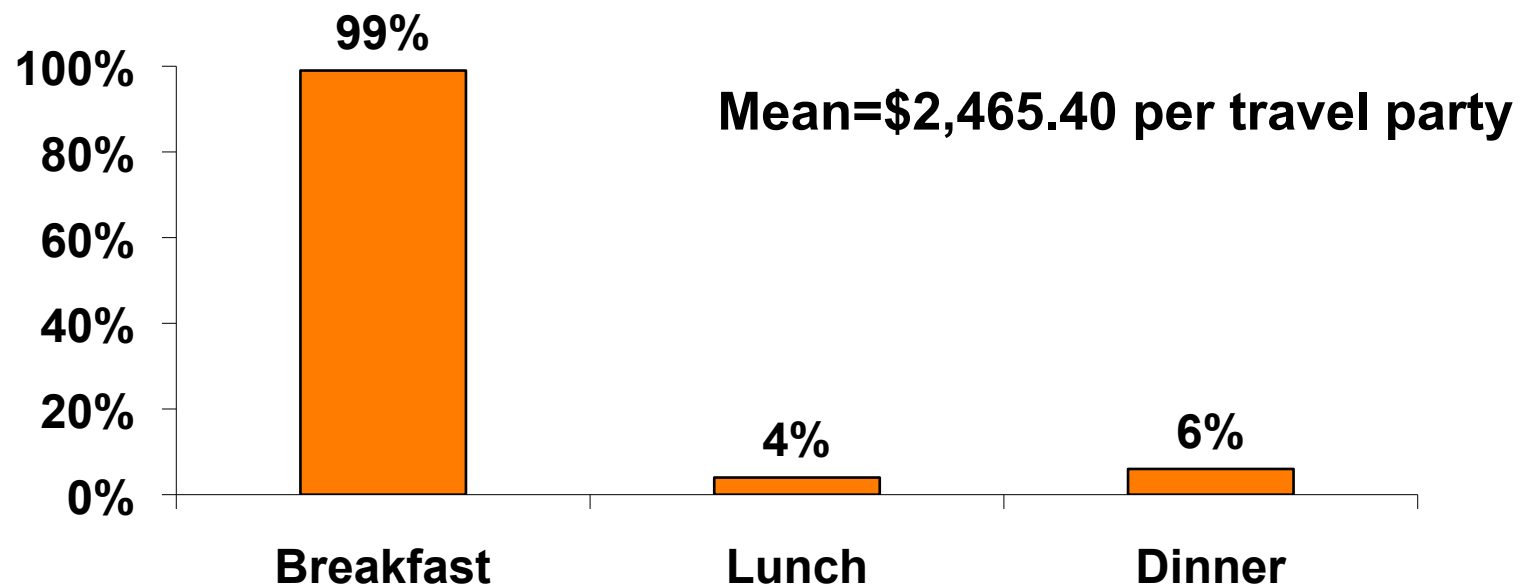
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,513.70
Air & Accommodation w/ daily meal package	\$2,465.40
Air only	\$1,673.10
Accommodation only	\$1,203.30
Accommodation w/ daily meal only	\$836.60
Food & Beverages in Hotel	\$169.90
Ground transportation - Hong Kong	\$85.60
Ground transportation - Guam	\$142.50
Optional tours/ activities	\$654.10
Other expenses	\$890.40
Total Prepaid	\$2,404.00

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

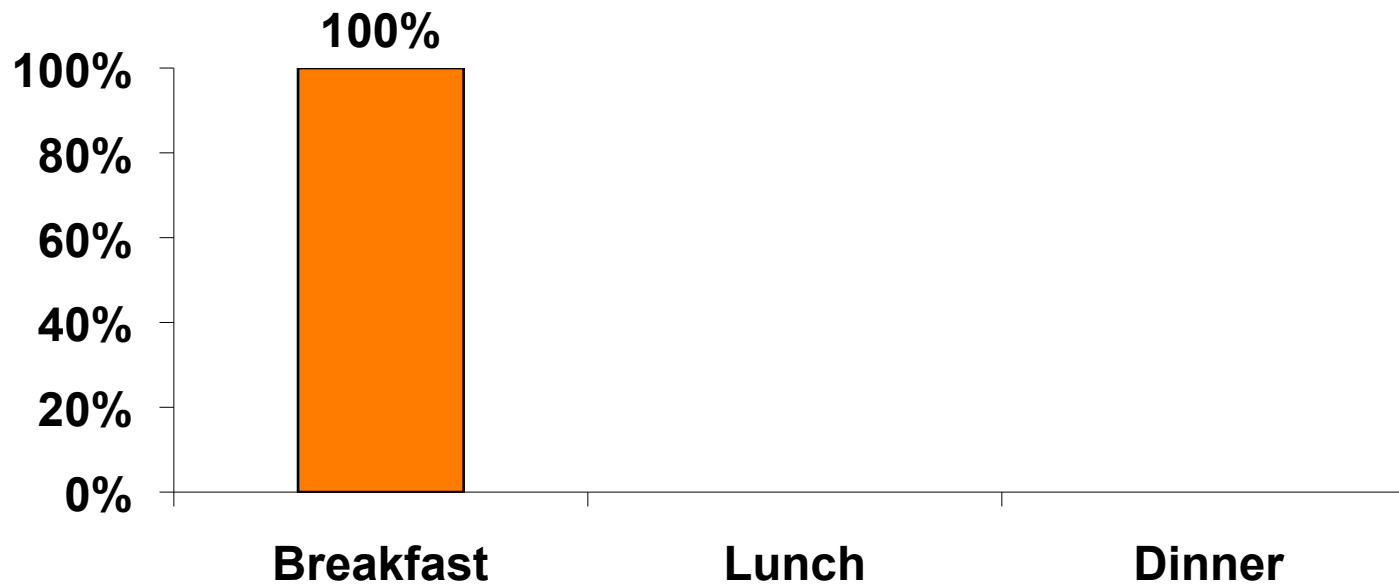
n=71



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

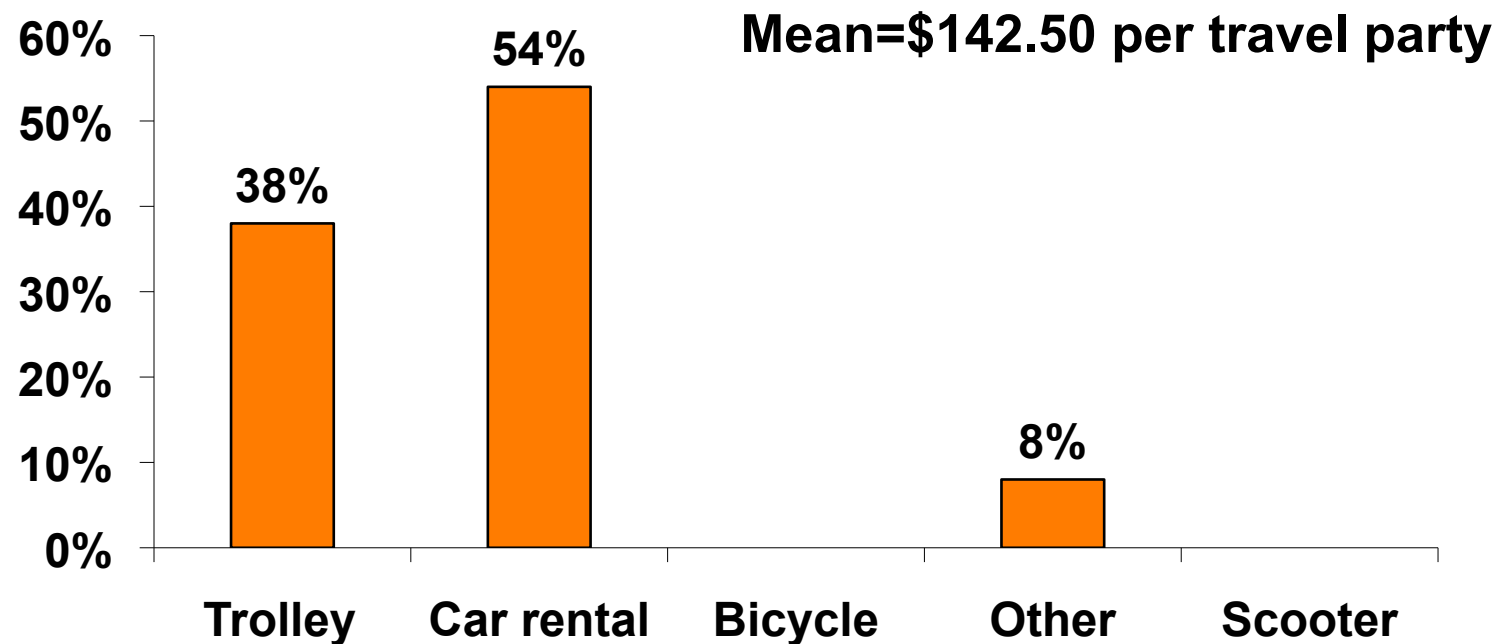
n= 2



Mean= \$836.60 per travel party

Prepaid Ground Transportation

n=13

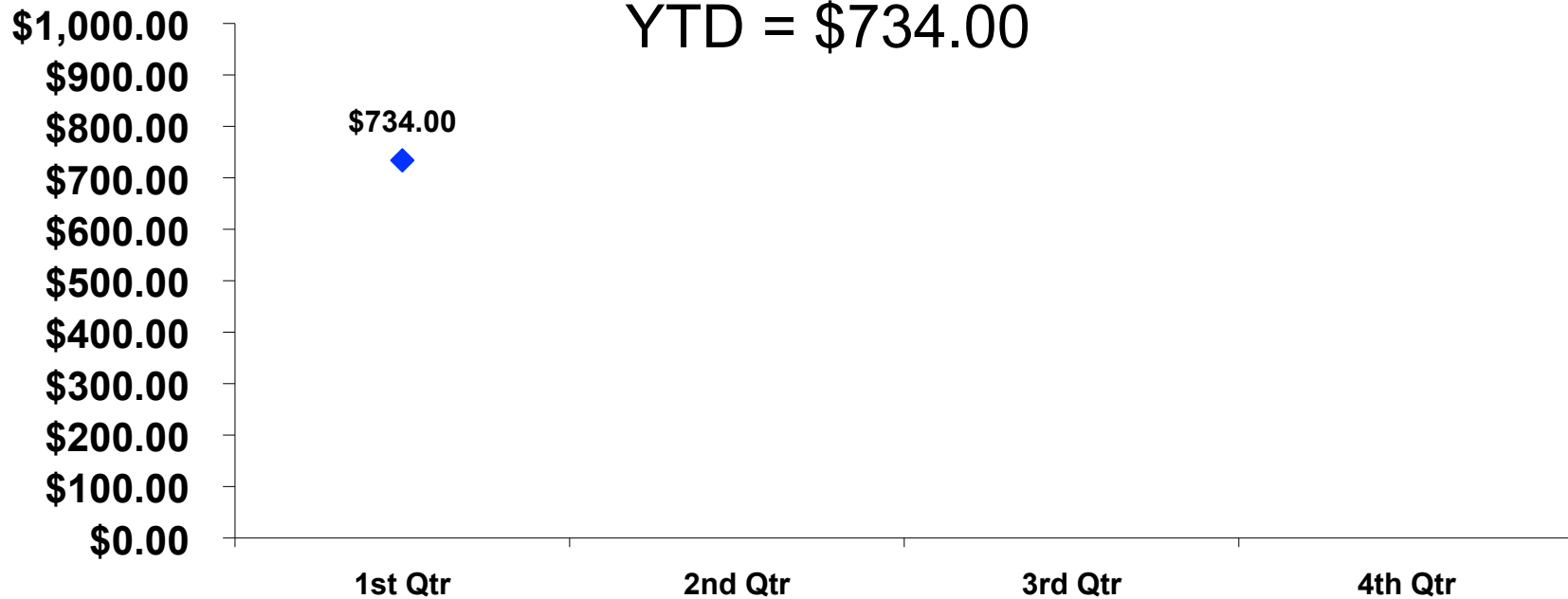


On-Island Expenditures

- \$1,262.80 = 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)
- \$734.00 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person

YTD = \$734.00



Total On-Island Expenditure by Gender & Age

		GENDER		GENDER								
		TOTAL	Male	Female	Male				Female			
					AGE				AGE			
					20-29	30-39	40-49	50+	20-29	30-39	40-49	50+
Q.11A	Mean	\$1,262.80	\$1,399.21	\$1,095.85	\$1,429.50	\$1,484.36	\$1,610.12	\$874.50	\$948.50	\$1,109.00	\$1,509.38	\$1,226.67
	Median	\$1,000	\$1,000	\$900	\$1,000	\$1,028	\$936	\$800	\$823	\$1,005	\$1,475	\$1,000

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
			Male	Female	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$86.57	\$93.85	\$77.76	\$92.20	\$86.96	\$115.33	\$34.55
	Median	\$15	\$20	\$0	\$20	\$50	\$63	\$0
F&B-FF	Mean	\$61.70	\$48.92	\$77.15	\$51.12	\$100.29	\$39.21	\$38.18
REST/CONV	Median	\$20	\$20	\$30	\$30	\$20	\$28	\$0
F&B-OUT- SIDE	Mean	\$95.41	\$97.18	\$93.27	\$94.97	\$114.44	\$67.66	\$110.91
HOTEL/ REST	Median	\$28	\$20	\$50	\$20	\$50	\$15	\$20
OPTIONAL	Mean	\$161.69	\$161.05	\$162.46	\$170.15	\$210.67	\$65.56	\$47.27
TOUR	Median	\$85	\$0	\$110	\$100	\$120	\$0	\$0
GIFT/	Mean	\$248.90	\$265.43	\$228.93	\$191.18	\$172.89	\$784.30	\$184.41
SOUV-SELF	Median	\$100	\$100	\$100	\$100	\$100	\$150	\$100
GIFT/ SOUV-	Mean	\$107.41	\$98.61	\$118.04	\$93.72	\$91.47	\$218.89	\$74.02
F&F AT HOME	Median	\$48	\$80	\$0	\$50	\$46	\$45	\$0
LOCAL TRANS	Mean	\$52.98	\$46.28	\$61.09	\$53.48	\$65.31	\$35.17	\$58.12
	Median	\$20	\$19	\$20	\$10	\$40	\$25	\$10
OTHER EXP	Mean	\$456.47	\$603.56	\$278.64	\$465.86	\$475.51	\$244.78	\$423.09
	Median	\$0	\$40	\$0	\$0	\$25	\$20	\$110
TOTAL ON	Mean	\$1,262.80	\$1,399.21	\$1,095.85	\$1,196.29	\$1,317.53	\$1,565.34	\$970.55
ISLAND	Median	\$1,000	\$1,000	\$900	\$900	\$1,010	\$1,193	\$1,000

On-Island Expenditures

First Timers & Repeaters

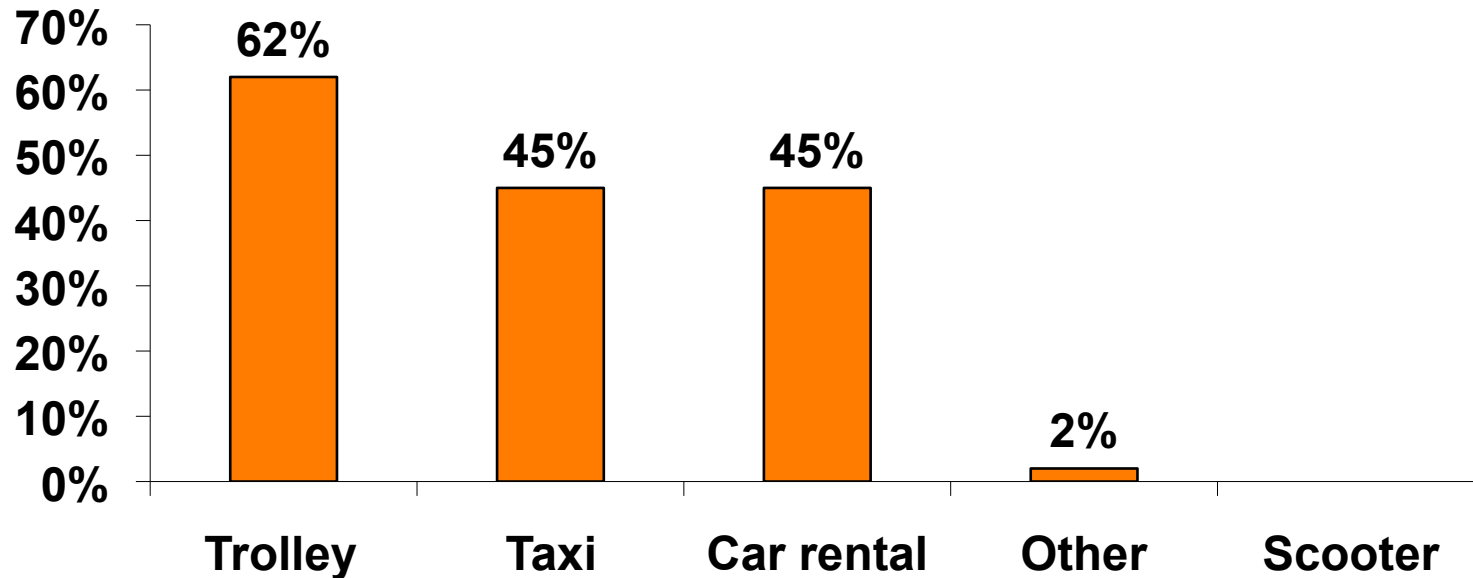
		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$88.07	\$32.50
	Median	\$15	\$15
F&B-FF REST/CONV	Mean	\$62.65	\$27.50
	Median	\$20	\$30
F&B-OUT- SIDE HOTEL/ REST	Mean	\$97.51	\$20.00
	Median	\$28	\$15
OPTIONAL TOUR	Mean	\$164.20	\$71.25
	Median	\$90	\$43
GIFT/ SOUV-SELF	Mean	\$251.69	\$148.75
	Median	\$100	\$198
GIFT/SOUV- F&F AT HOME	Mean	\$109.35	\$37.50
	Median	\$48	\$25
LOCAL TRANS	Mean	\$53.69	\$27.50
	Median	\$20	\$15
OTHER EXP	Mean	\$460.24	\$320.50
	Median	\$0	\$127
TOTAL ON ISLAND	Mean	\$1,278.73	\$685.50
	Median	\$1,000	\$657

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$86.60
Food & beverage in fast food restaurant/ convenience store	\$61.70
Food & beverage at restaurants or drinking establishments outside a hotel	\$95.40
Optional tours and activities	\$161.70
Gifts/ souvenirs for yourself/companions	\$248.90
Gifts/ souvenirs for friends/family at home	\$107.40
Local transportation	\$53.00
Other expenses not covered	\$456.50
Average Total	\$1,262.80

Local Transportation

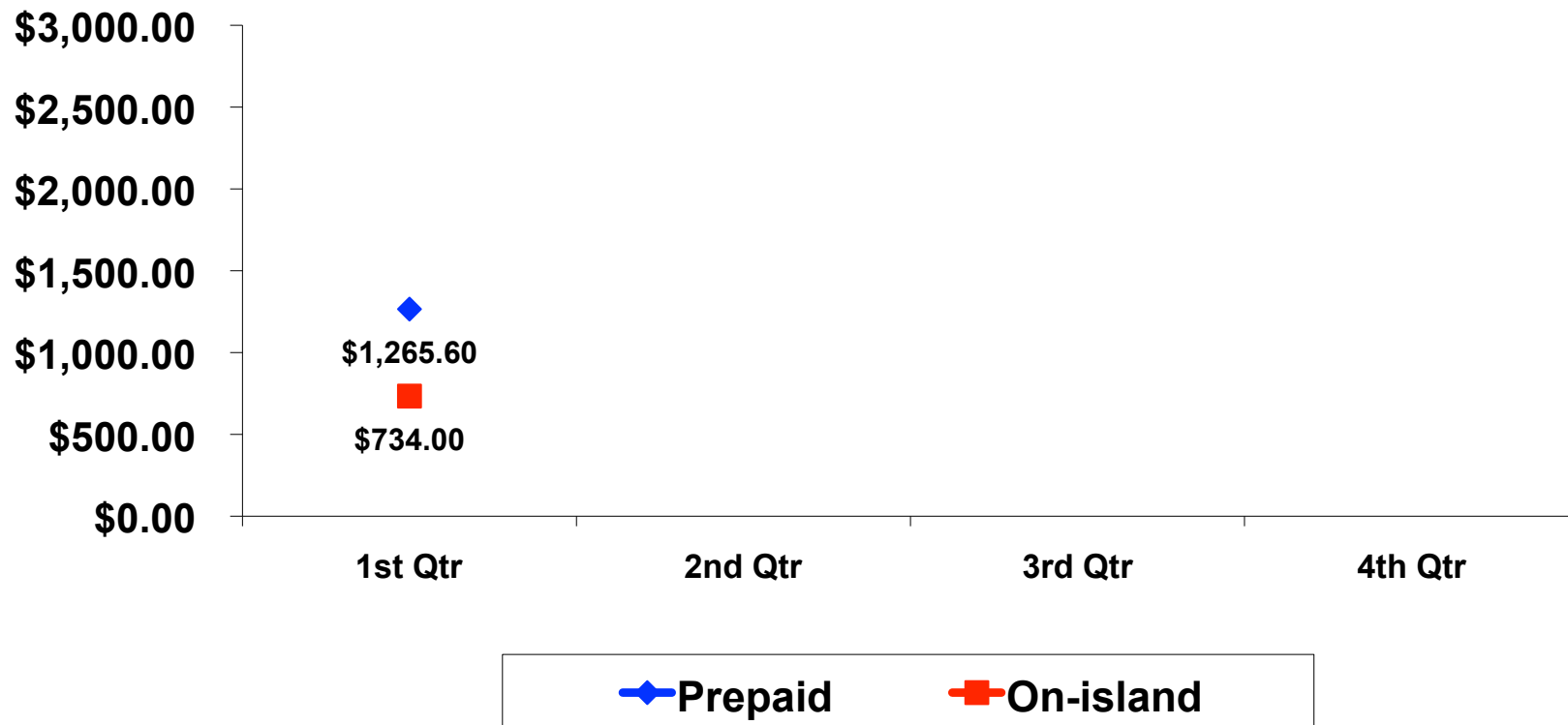
n=53



Mean=\$53.00 per travel party

Prepaid/On-Island Expenditures Per Person

Prepaid YTD=\$1,265.60 • On-Island YTD = \$734.00

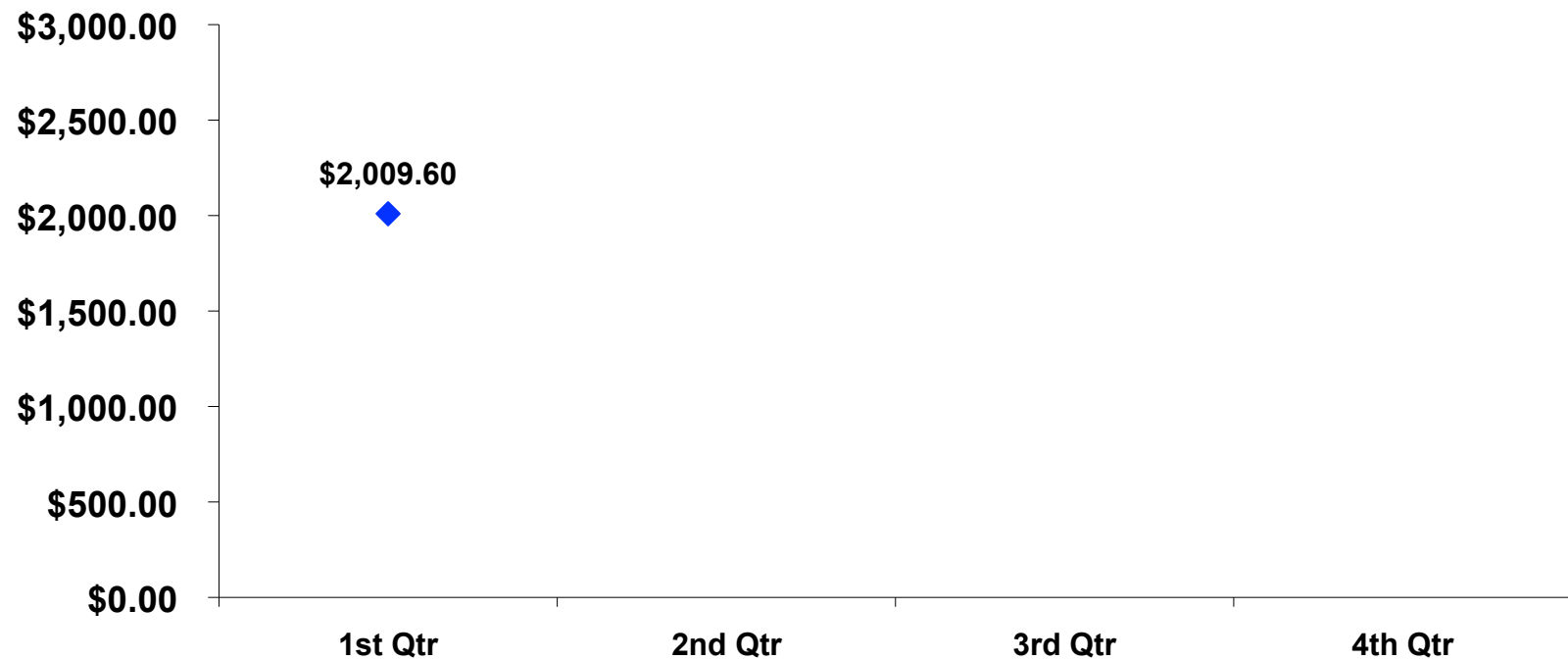


Total Expenditures Per Person (Prepaid & On-Island)

- \$2,009.60 = 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

YTD=\$2,009.60



Guam Airport Expenditures

- \$50.40 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

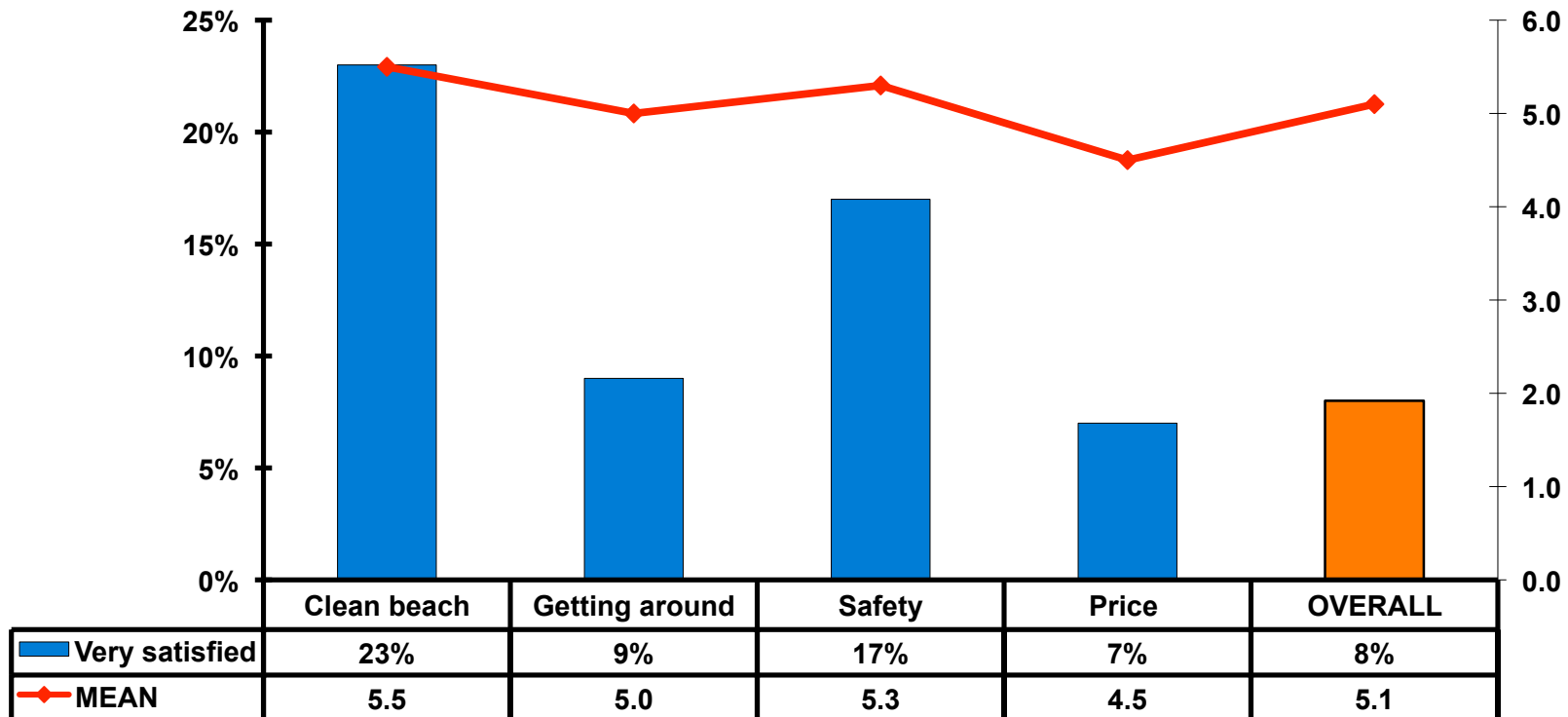
	MEAN \$
Food & Beverages	\$7.20
Gifts/Souvenirs Self	\$25.80
Gifts/Souvenirs Others	\$17.50
Total	\$50.40

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

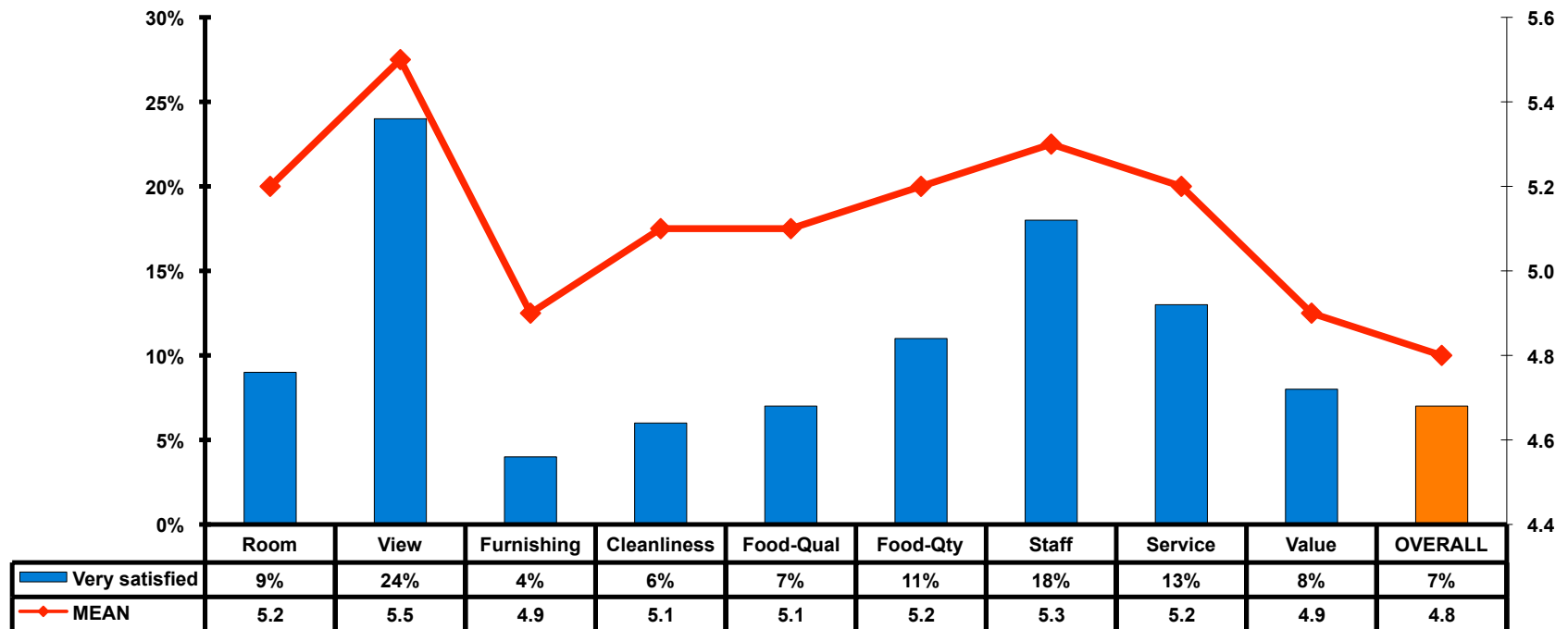
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

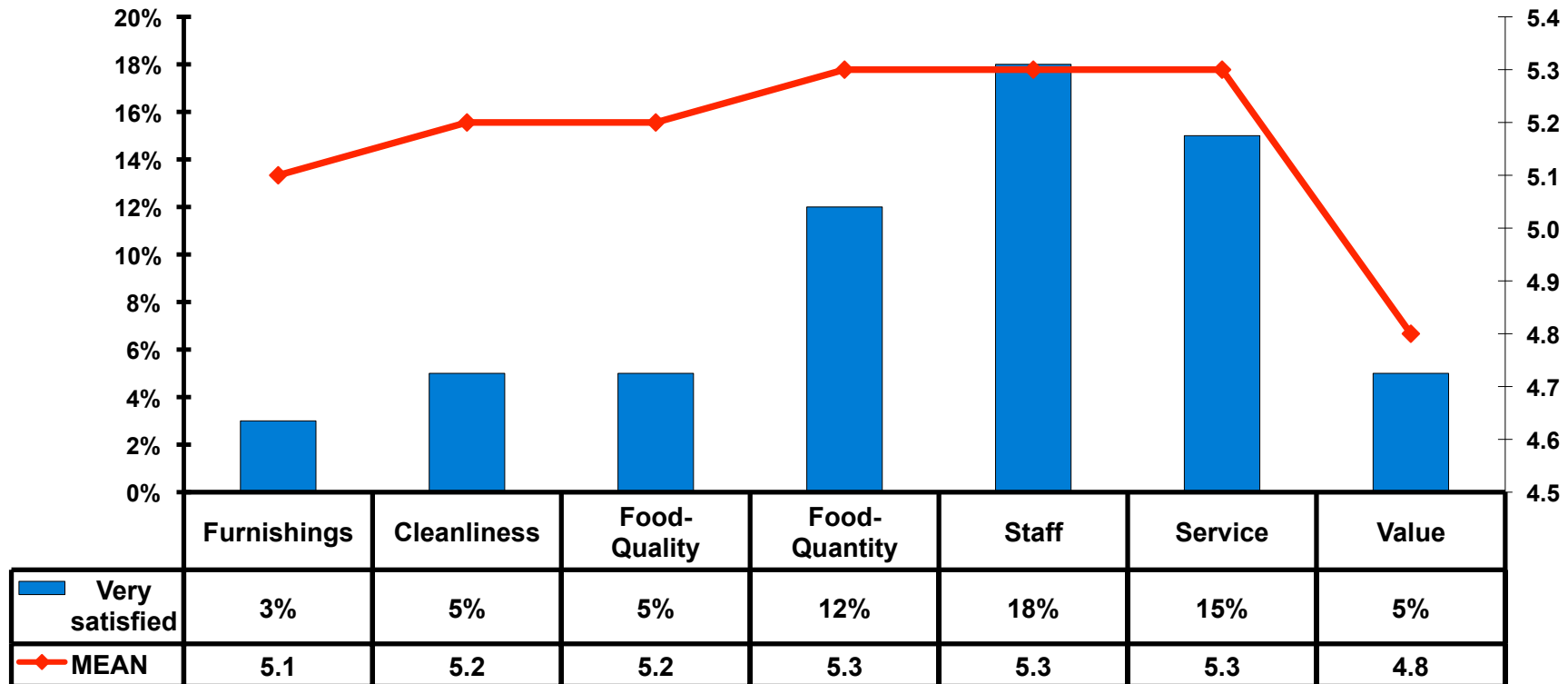
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

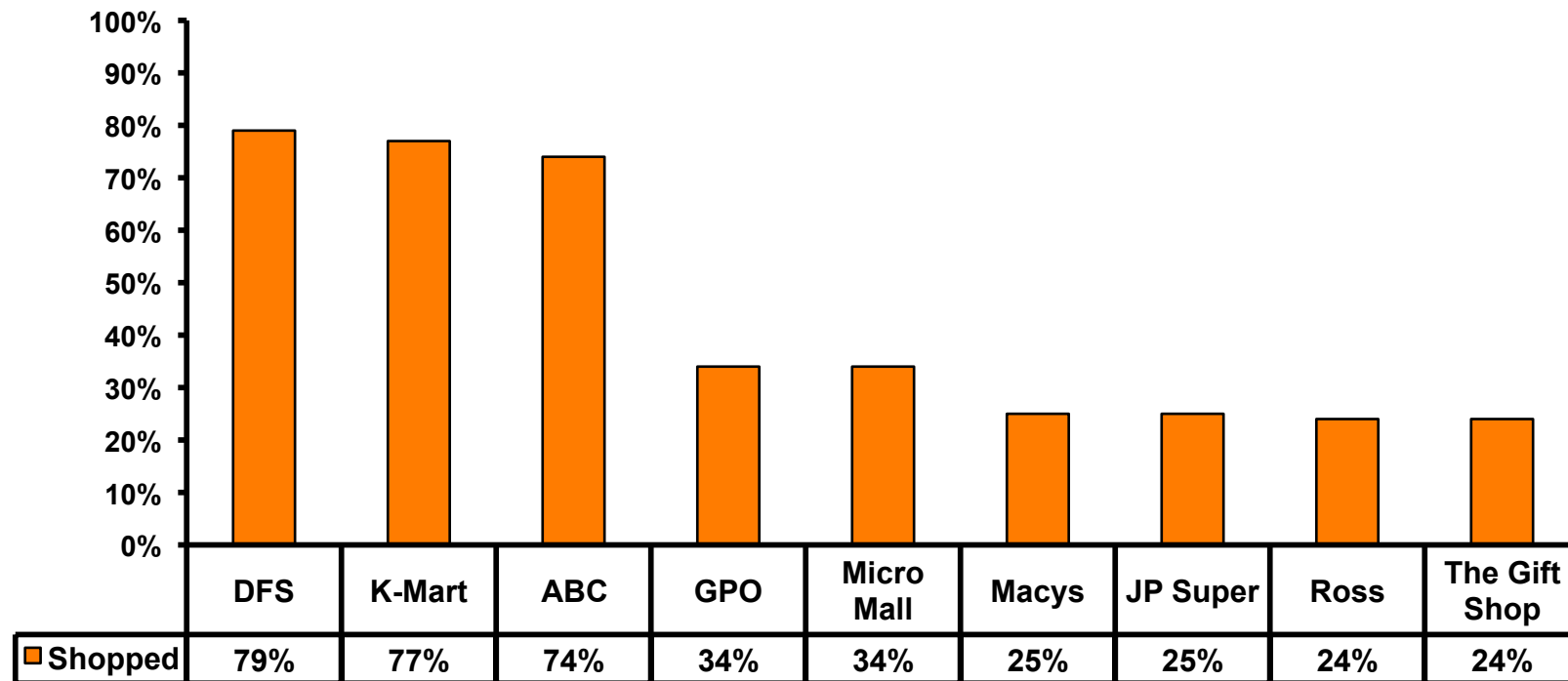
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

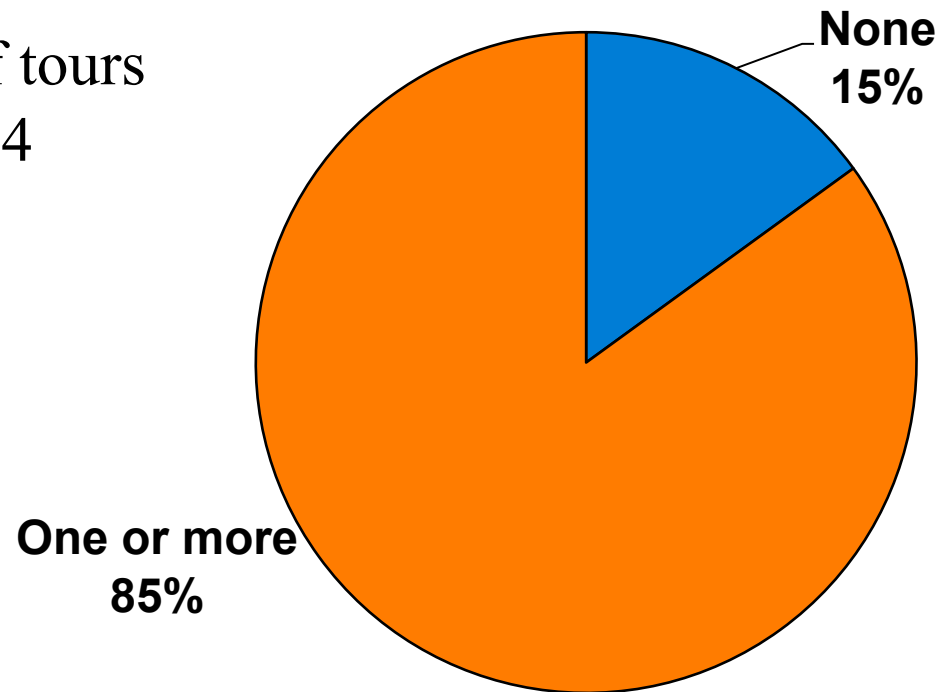
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

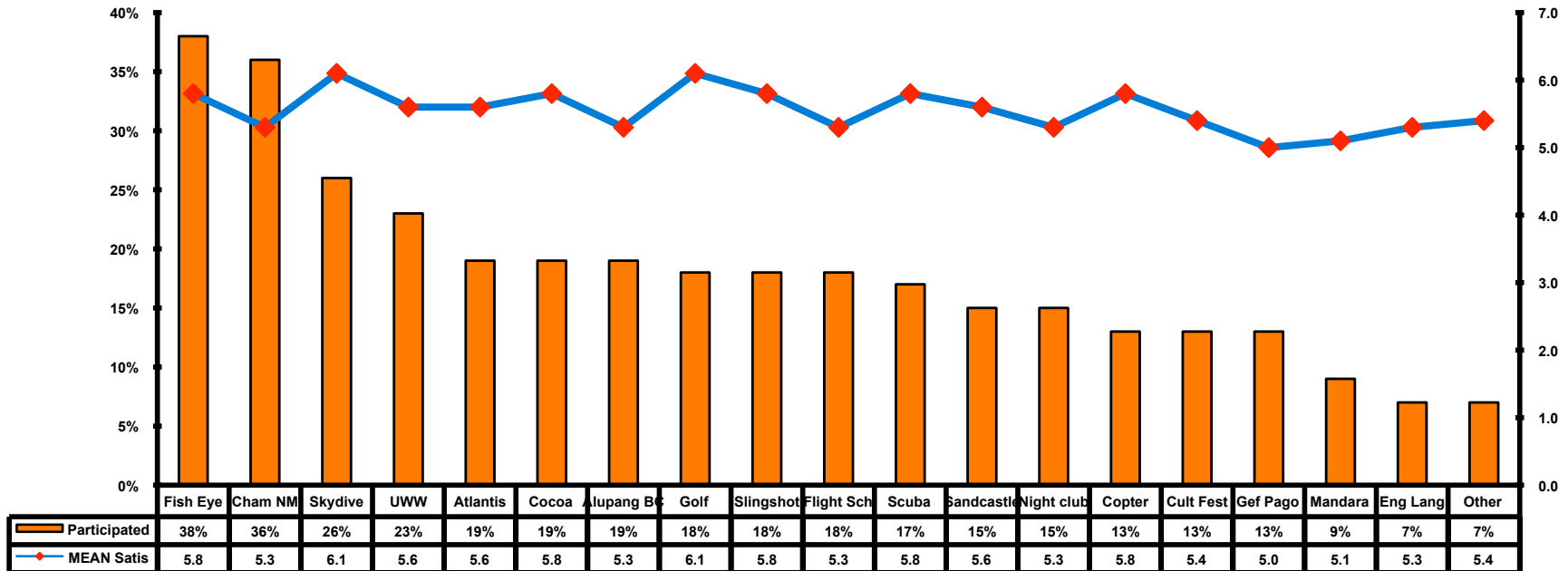
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 29%	Score of 6 to 7 = 28%
Score of 4 to 5 = 60%	Score of 4 to 5 = 61%
Score 1 to 3 = 10%	Score 1 to 3 = 11%
MEAN = 4.9	MEAN = 4.8

Optional Tour Participation

- Average number of tours participated in is 2.4



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 = 45%	Score of 6 to 7 = 39%
Score of 4 to 5 = 54%	Score of 4 to 5 = 55%
Score 1 to 3 = 1%	Score 1 to 3 = 5%
MEAN = 5.3	MEAN = 5.2

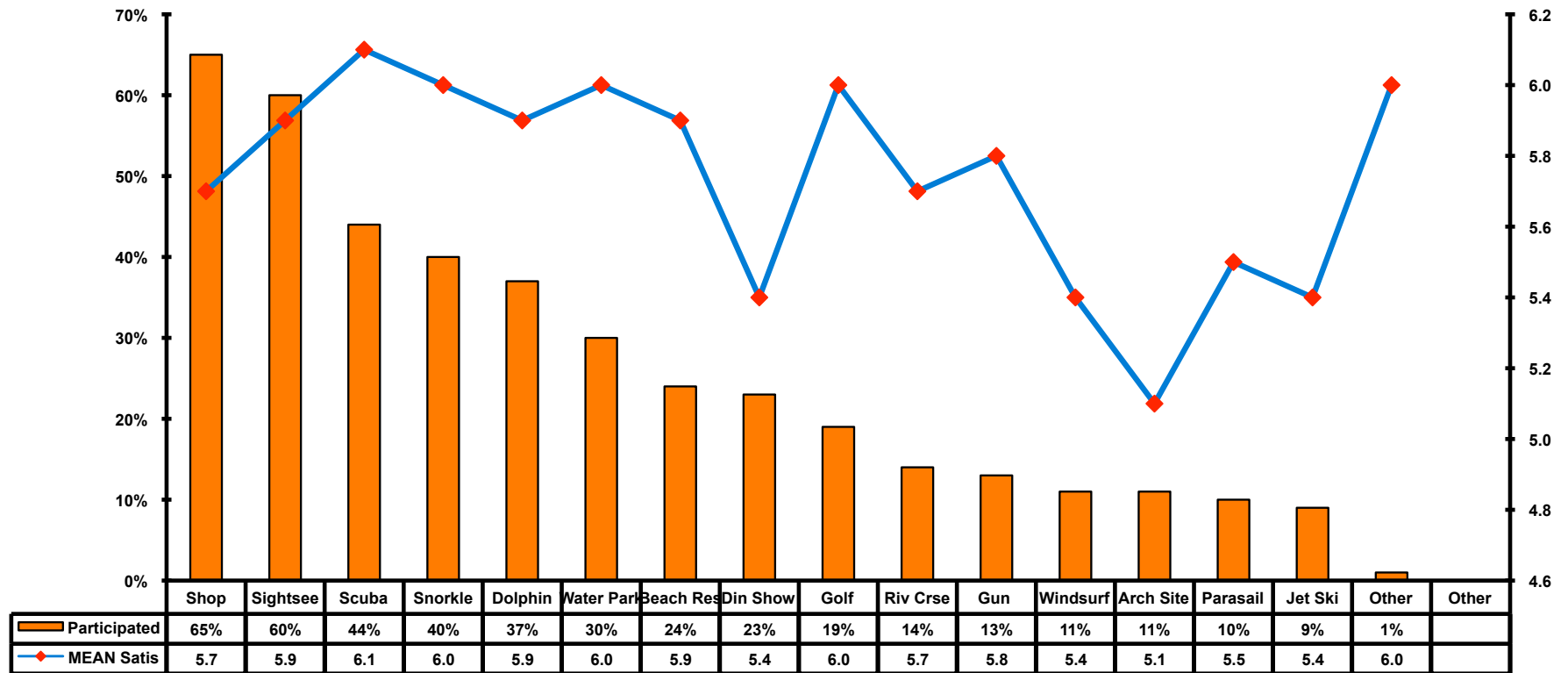
Night Tours Satisfaction

7pt Rating Scale

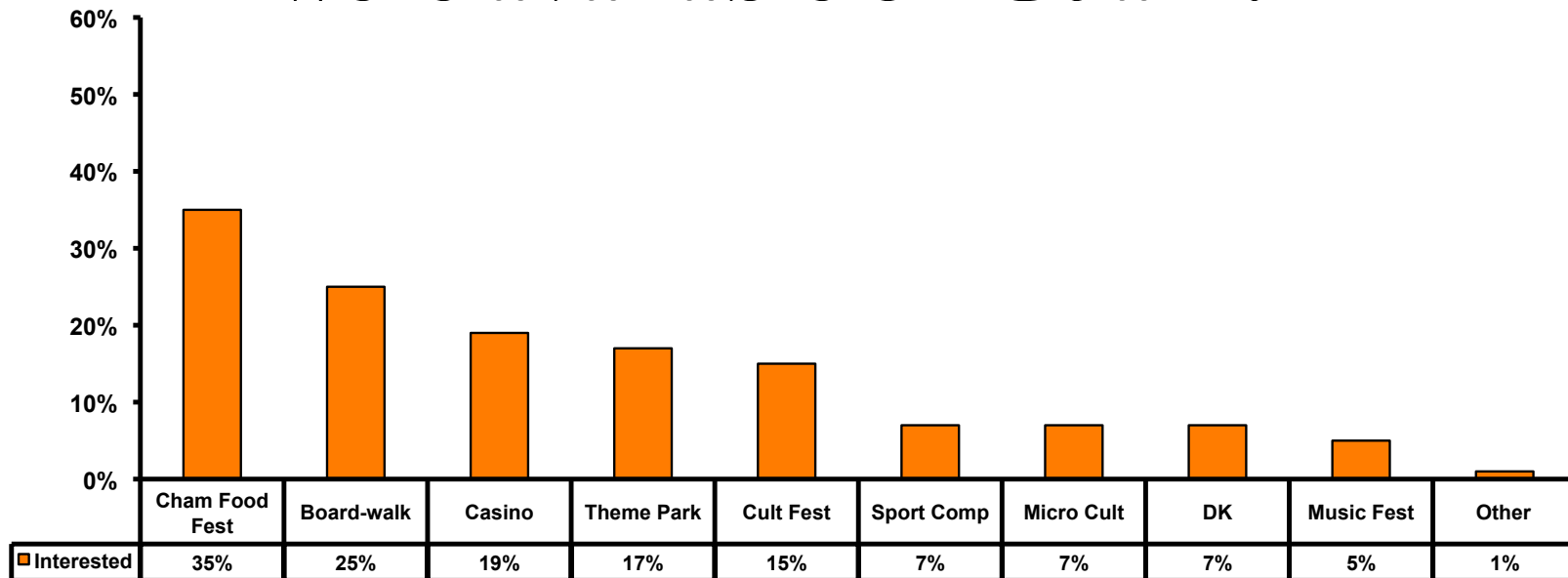
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 30%	Score of 6 to 7 = 31%
Score of 4 to 5 = 61%	Score of 4 to 5 = 60%
Score 1 to 3 = 9%	Score 1 to 3 = 11%
MEAN = 4.9	MEAN = 4.9

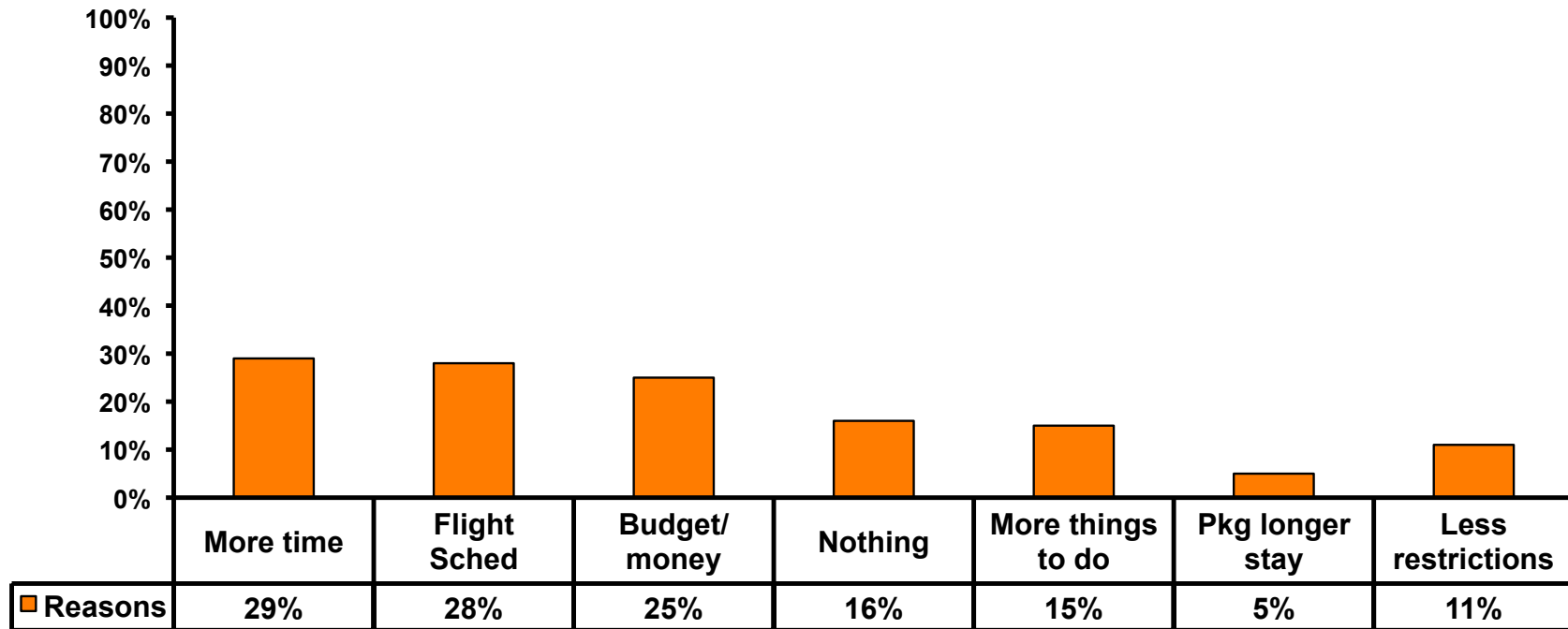
Satisfaction with Other Activities



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



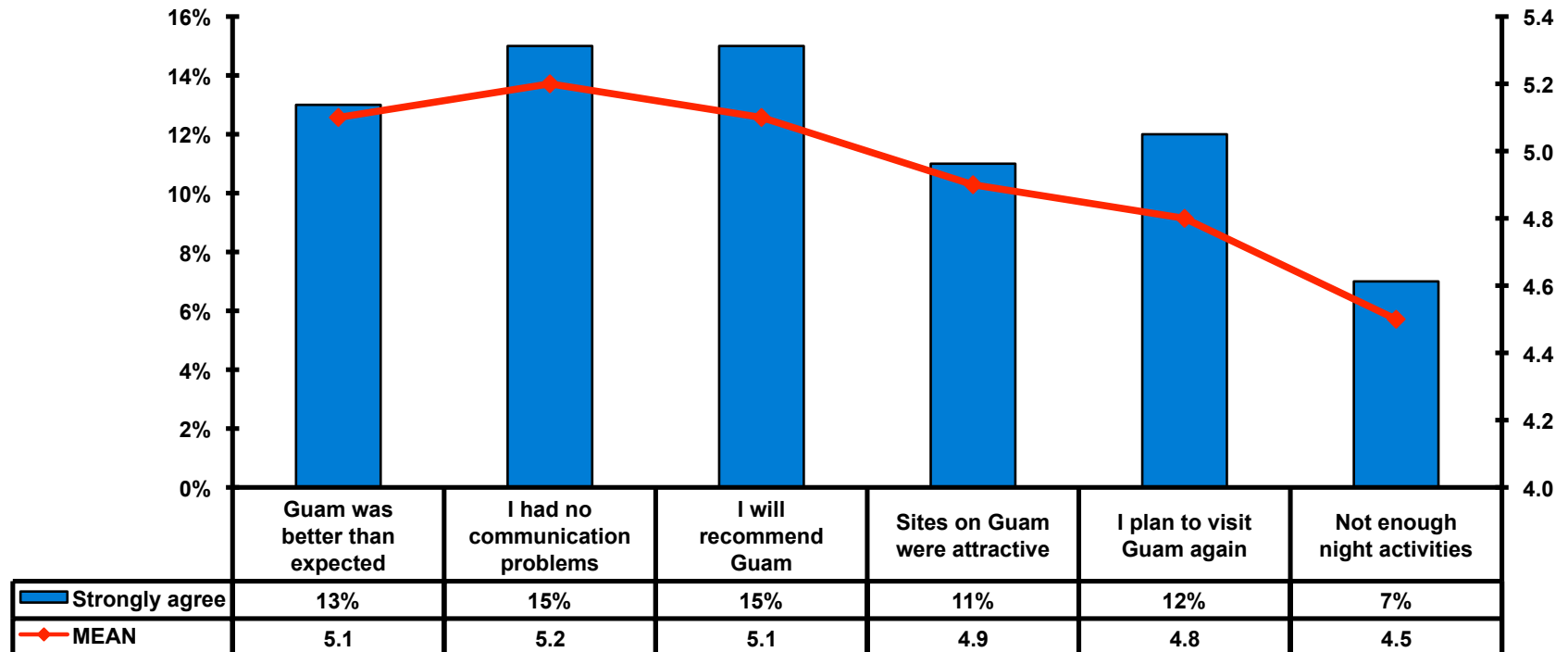
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

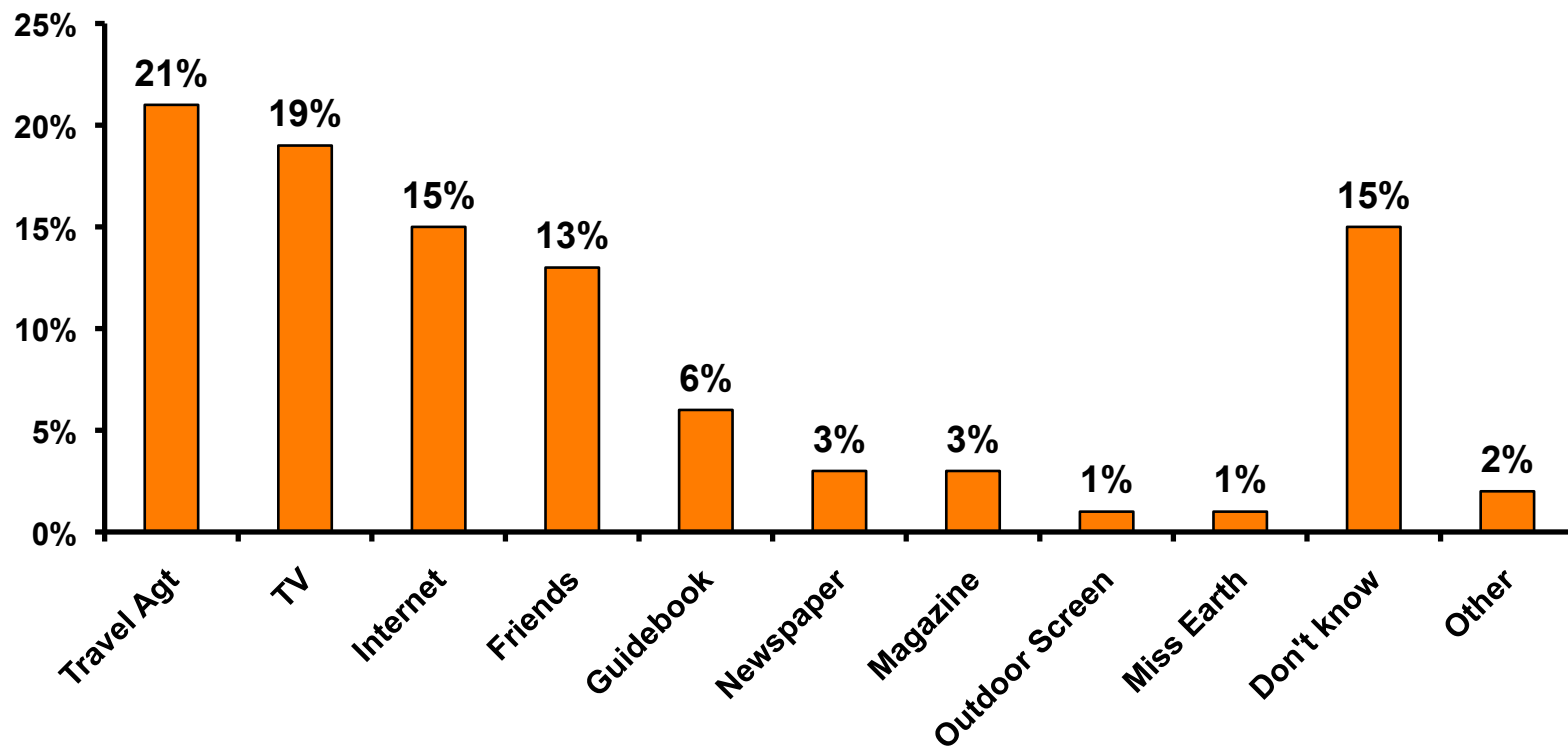
7=Very Satisfied/ 1=Very Dissatisfied



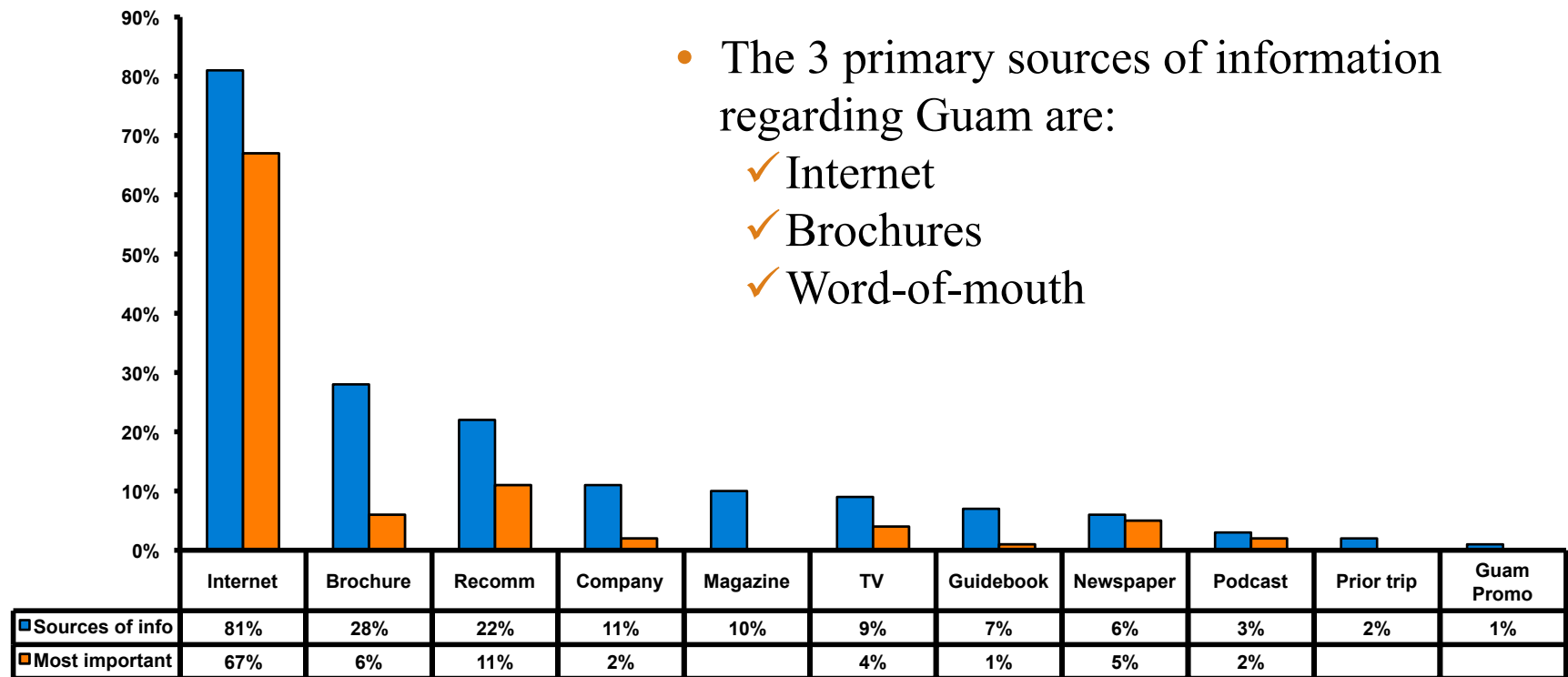
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

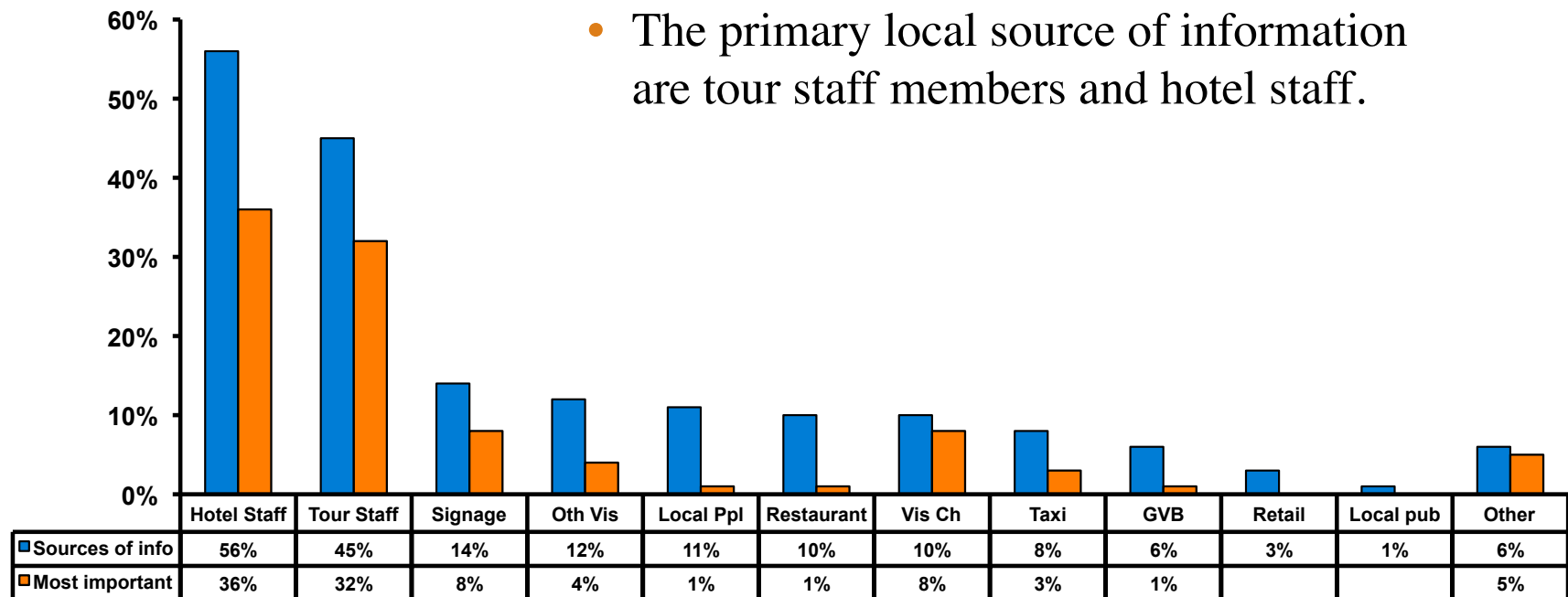


Sources of Information Pre-arrival

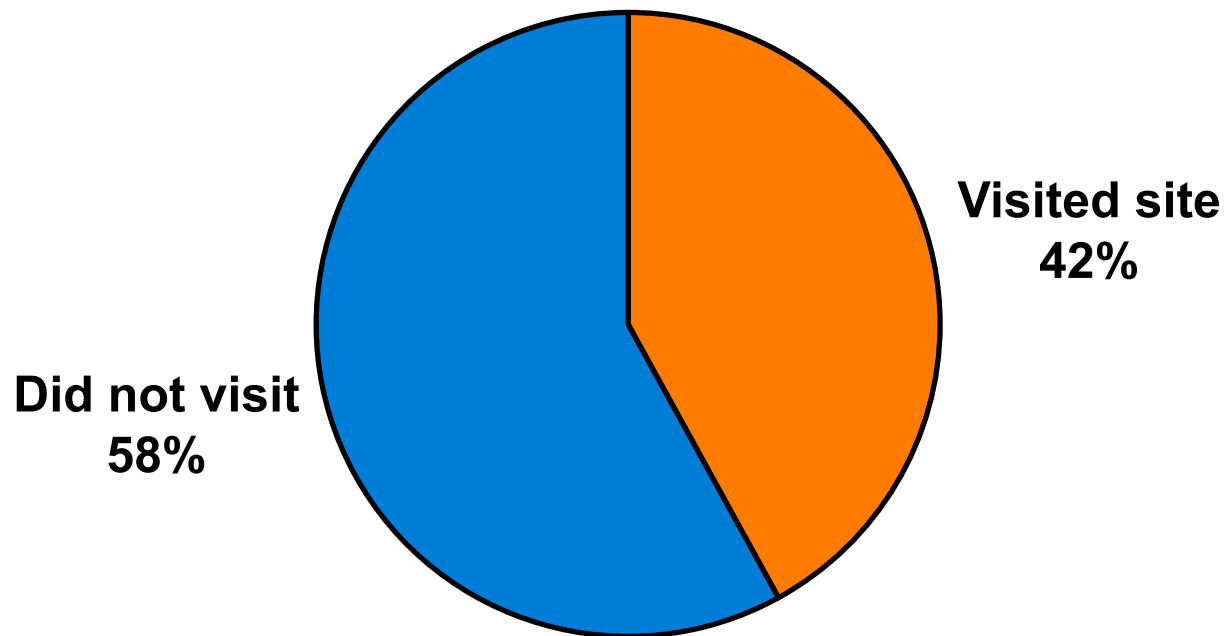


Sources of Information Post-arrival

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

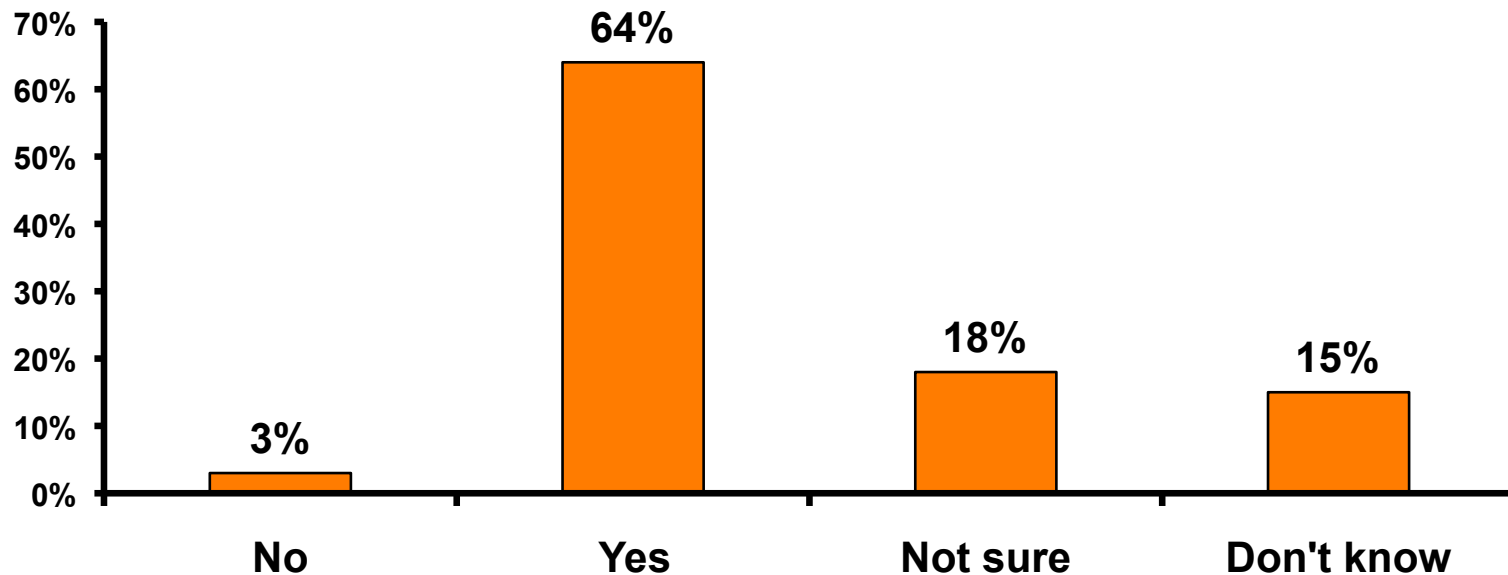


Visited GVB Website



SECTION 6 **OTHER ISSUES**

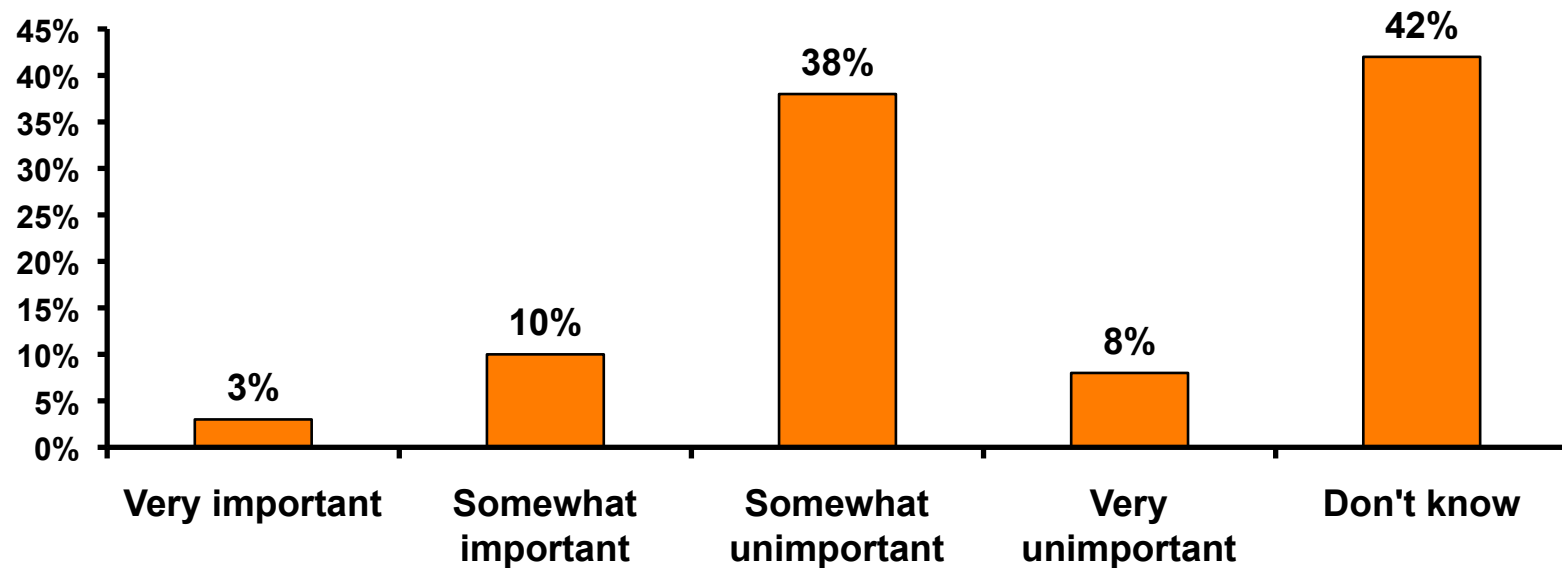
Good time to spend money on travel outside of Hong Kong



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

		AGE				PERSONAL INCOME			
		20-29	30-39	40-49	50+	<240K	240K-1.0M	1.0M-3.0M	Refused
Q.22	No		9%			8%	4%		
	Yes	69%	51%	56%	80%	42%	57%	70%	50%
	Not sure	17%	30%	11%		8%	25%	30%	
	Do not know	14%	9%	33%	20%	42%	13%		50%
Total	Count	64	43	18	10	12	75	10	4

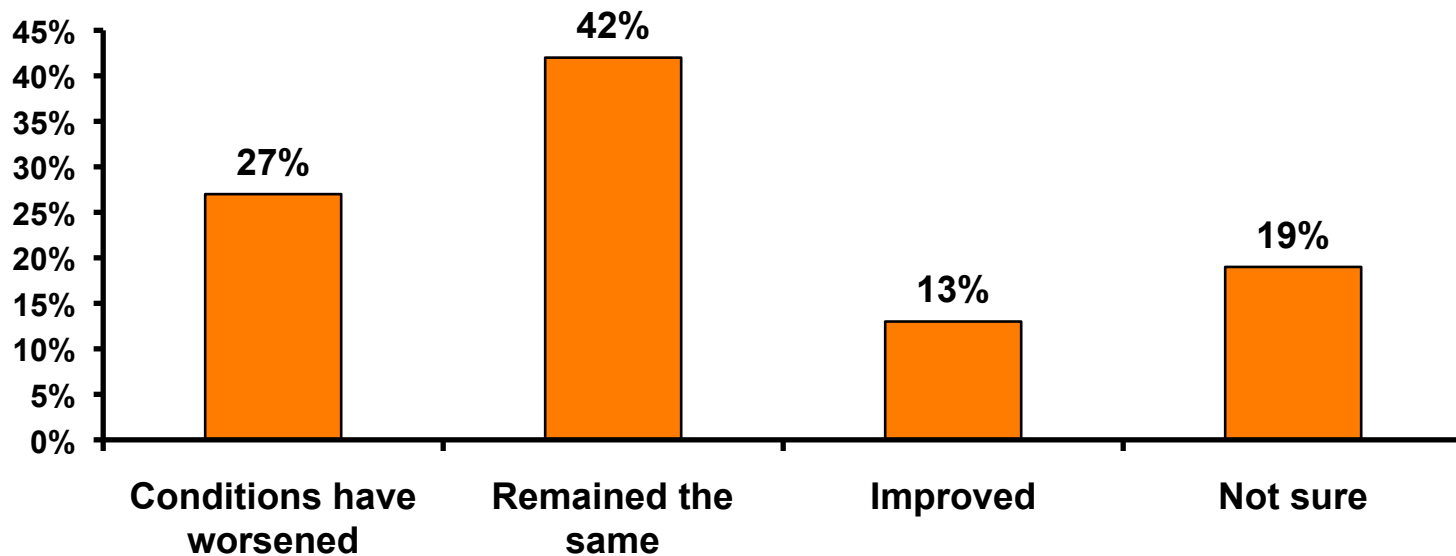
The importance of the state of the Hong Kong economy in decision to travel outside of Hong Kong



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

		AGE				PERSONAL INCOME			
		20-29	30-39	40-49	50+	<240K	240K-1.0M	1.0M-3.0M	Refused
Q.23	Very unimportant	11%	2%	11%	10%	25%	3%	20%	75%
	Somewhat unimportant	41%	28%	33%	30%	17%	32%	30%	
	Somewhat important	11%	12%		20%		15%	10%	
	Very important	2%	7%	6%		8%	4%	10%	
	Don't know	36%	51%	50%	40%	50%	47%	30%	25%
Total	Count	64	43	18	10	12	75	10	4

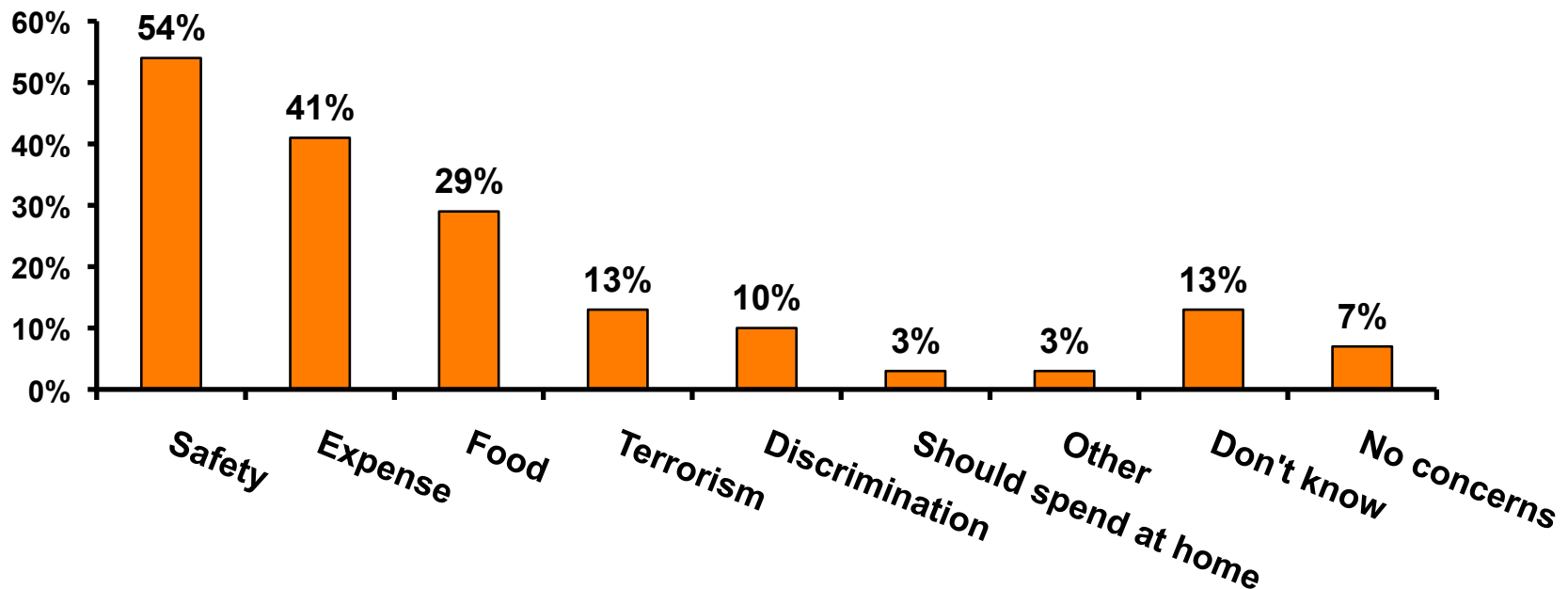
Rating Hong Kong Economy Compared to 12 months ago



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

		AGE				PERSONAL INCOME			
		20-29	30-39	40-49	50+	<240K	240K-1.0M	1.0M-3.0M	Refused
Q.21	Conditions have worsened	23%	33%	28%	30%	42%	34%	10%	50%
	Conditions have remained the same	48%	21%	56%	50%	25%	38%	30%	50%
	Conditions have improved	13%	19%	6%		8%	11%	40%	
	Do not know	16%	28%	11%	20%	25%	17%	20%	
Total	Count	64	43	18	10	12	76	10	4

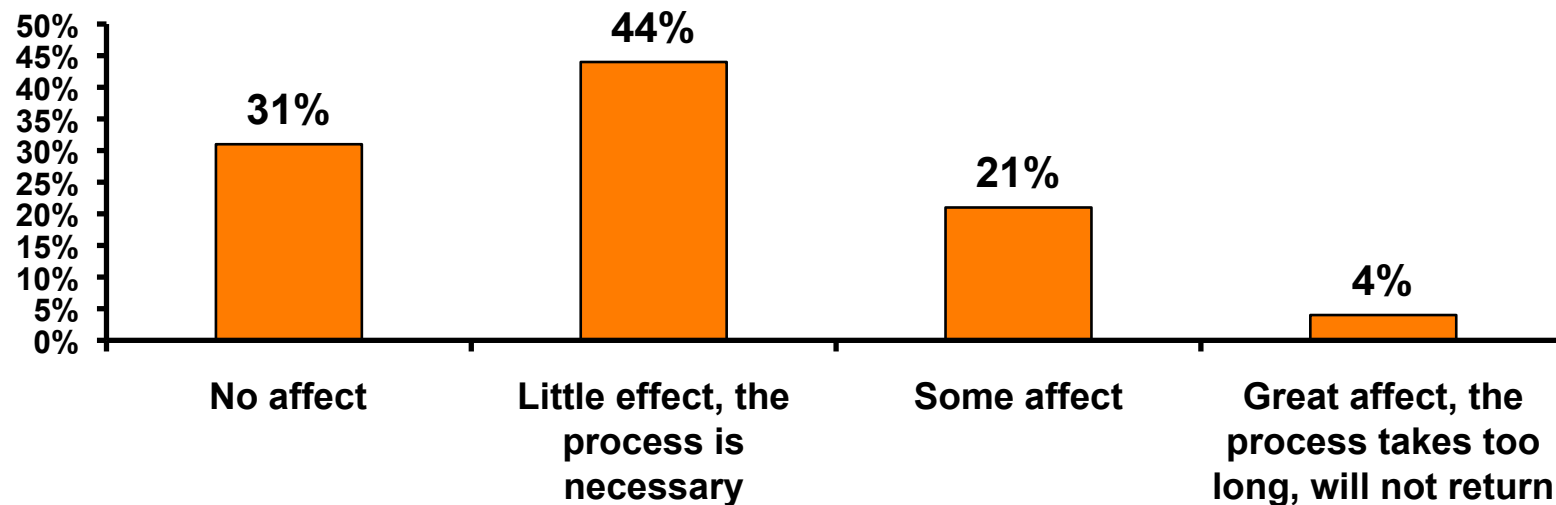
Concerns about travel outside of Hong Kong - Overall



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

		AGE				PERSONAL INCOME			
		20-29	30-39	40-49	50+	<240K	240K-1.0M	1.0M-3.0M	Refused
Q.24	Safety at my destination	48%	51%	71%	50%	25%	60%	50%	100%
	Expense	44%	49%	24%	40%	58%	43%	40%	
	Food	22%	35%	29%	40%	50%	31%	30%	
	Terrorism	9%	19%	12%	10%	17%	16%	20%	25%
	Don't know	17%	9%	18%	10%	33%	12%		
	Discrimination against Hong Kong	3%	19%	6%	10%	17%	11%	20%	
	No concerns	6%	14%				7%	10%	
	Other		7%	6%	10%		4%	20%	
	Spending money abroad when it should be spent at home	5%	2%				3%	20%	
Total	Cases	64	43	17	10	12	75	10	4

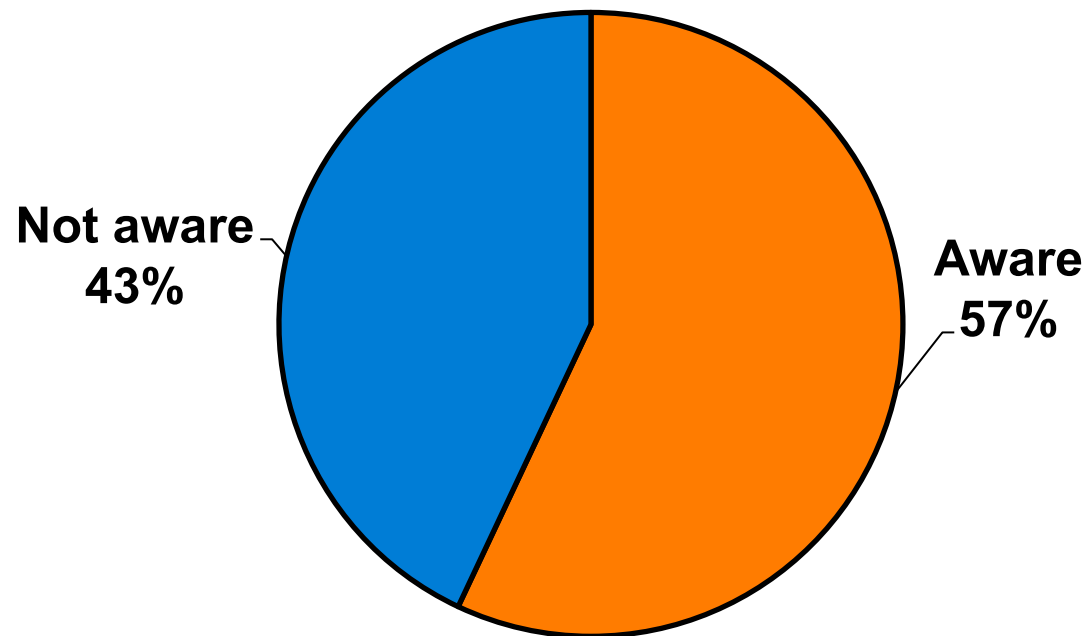
Security Screening/ Immigration Process at Guam International Airport



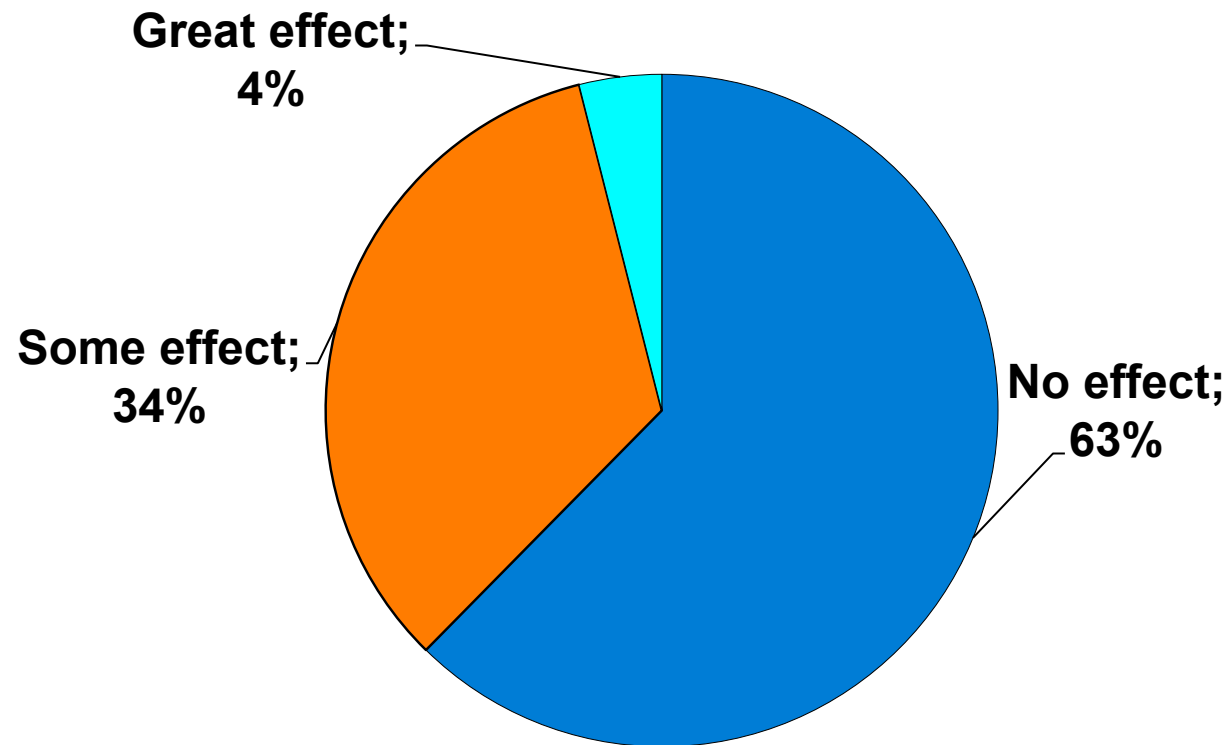
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **3.5** out of possible 7.0
- Agree (Score 6-7) – **12%**
- Neutral (Score 4-5) – **43%**
- Disagree (Score 1-3) – **46%**

Awareness of U.S. military troops from Japan to Guam



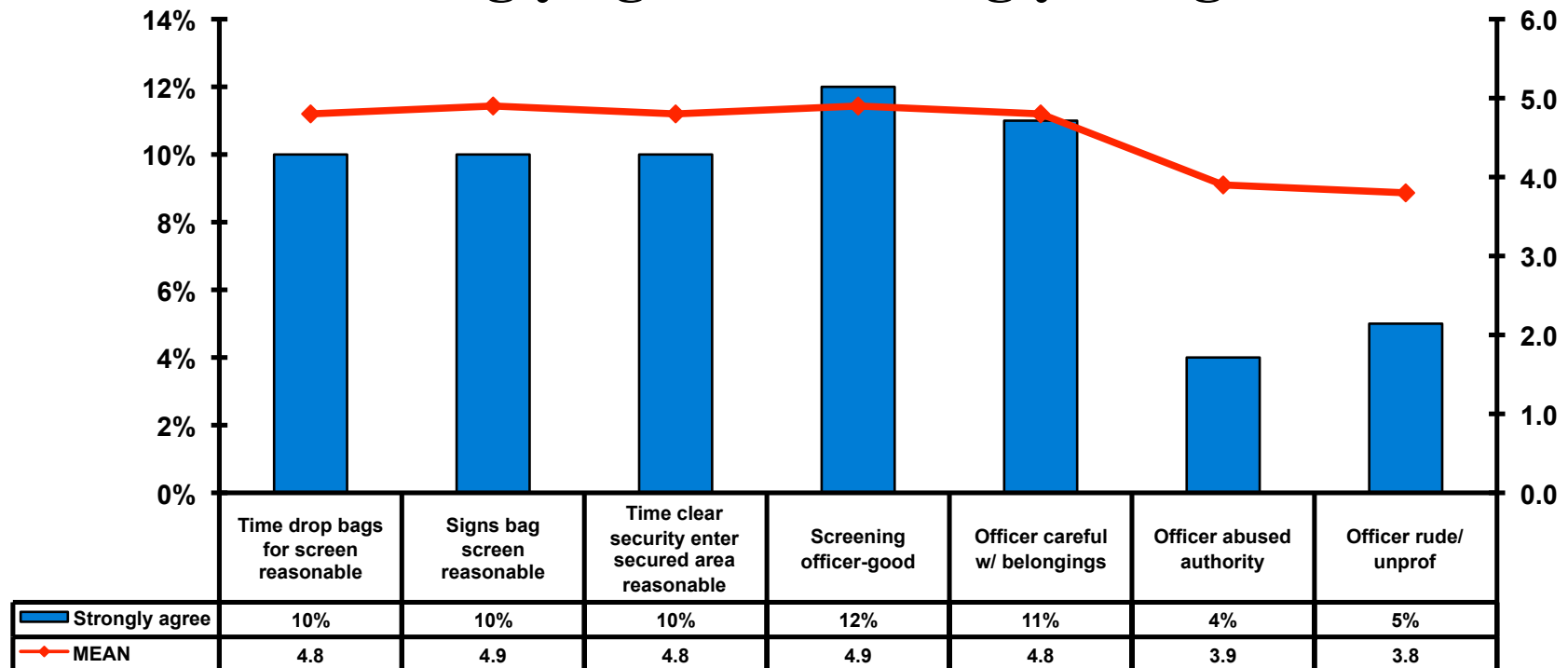
Effects of military troop movement on future trips to Guam



Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



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

