



GUAM VISITORS BUREAU

Hong Kong Visitor Tracker Exit Profile

2nd QTR FY2012



Prepared by: QMark Research

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Background & Methodology

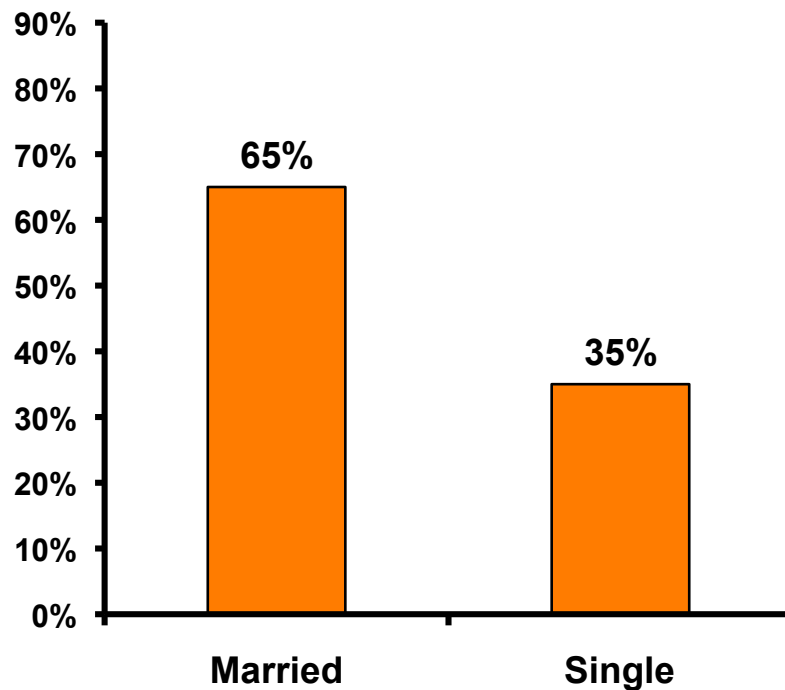
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Chinese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **150** departing Hong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

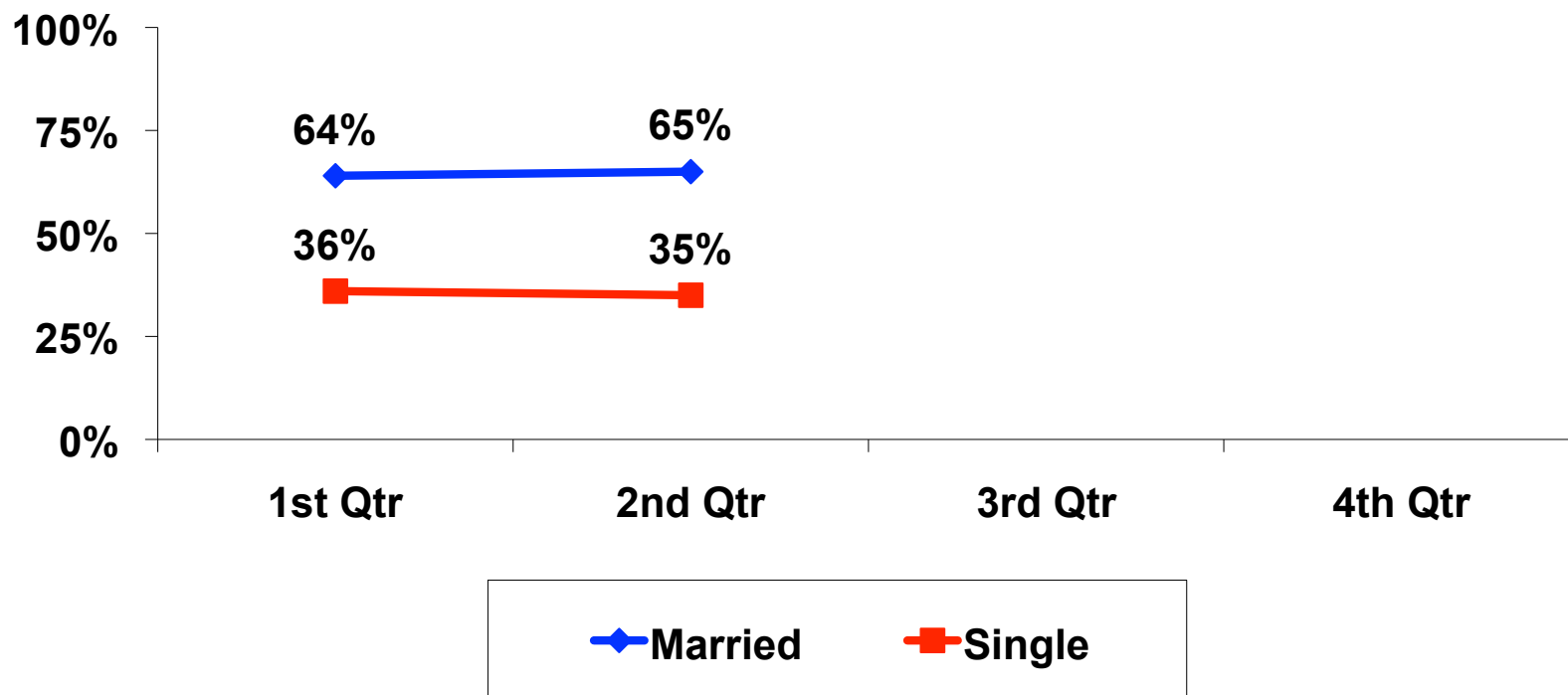
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

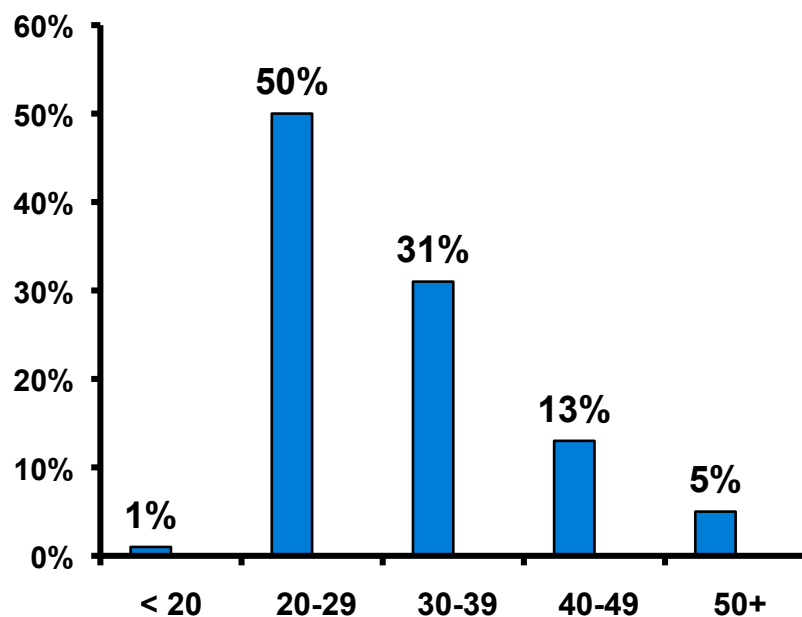


- A majority of visitors are married.

Marital Status

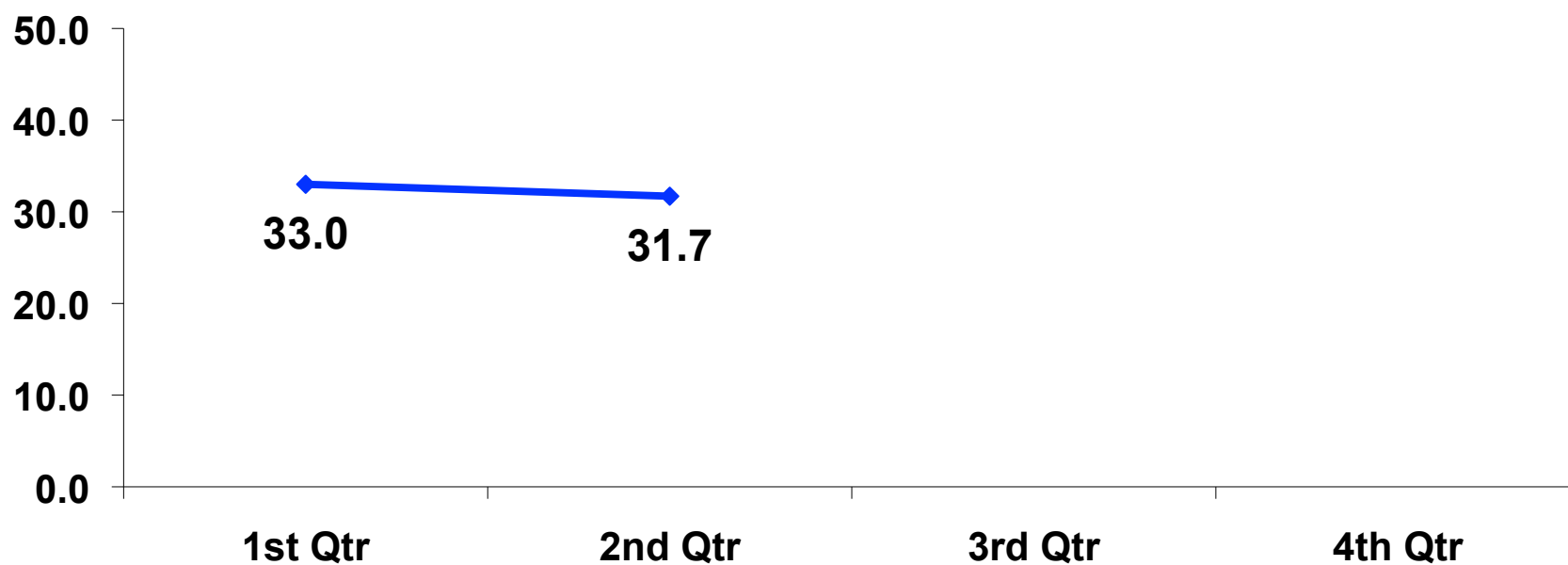


Age - Overall

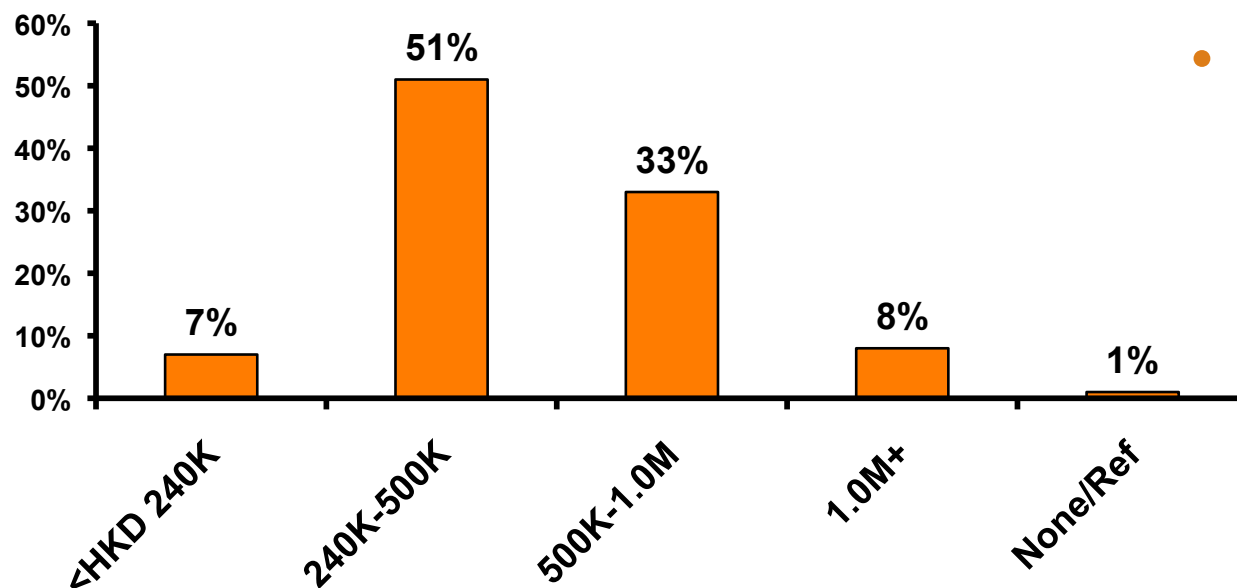


- The average age of the respondents is 31.7 years of age.

Average Age

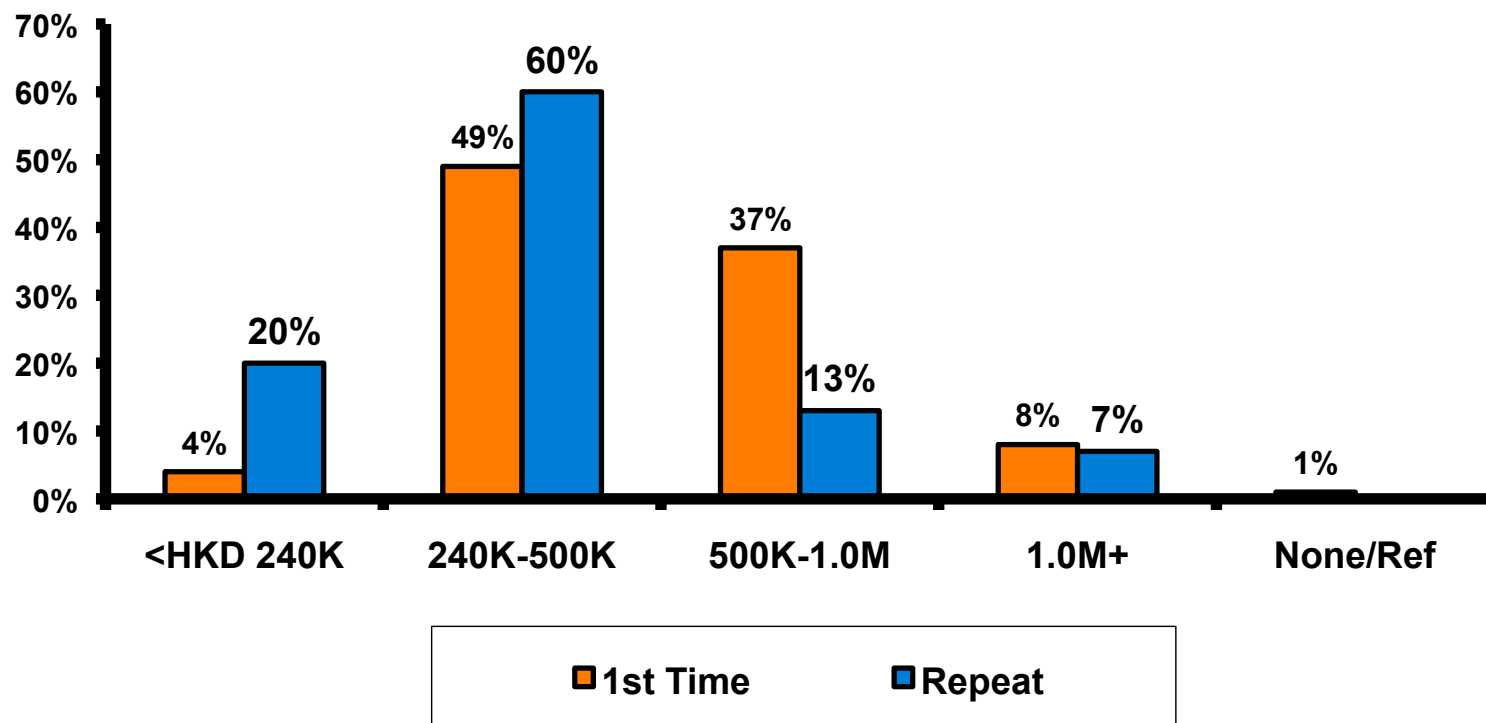


Personal Income



• HKD 7.75=\$1

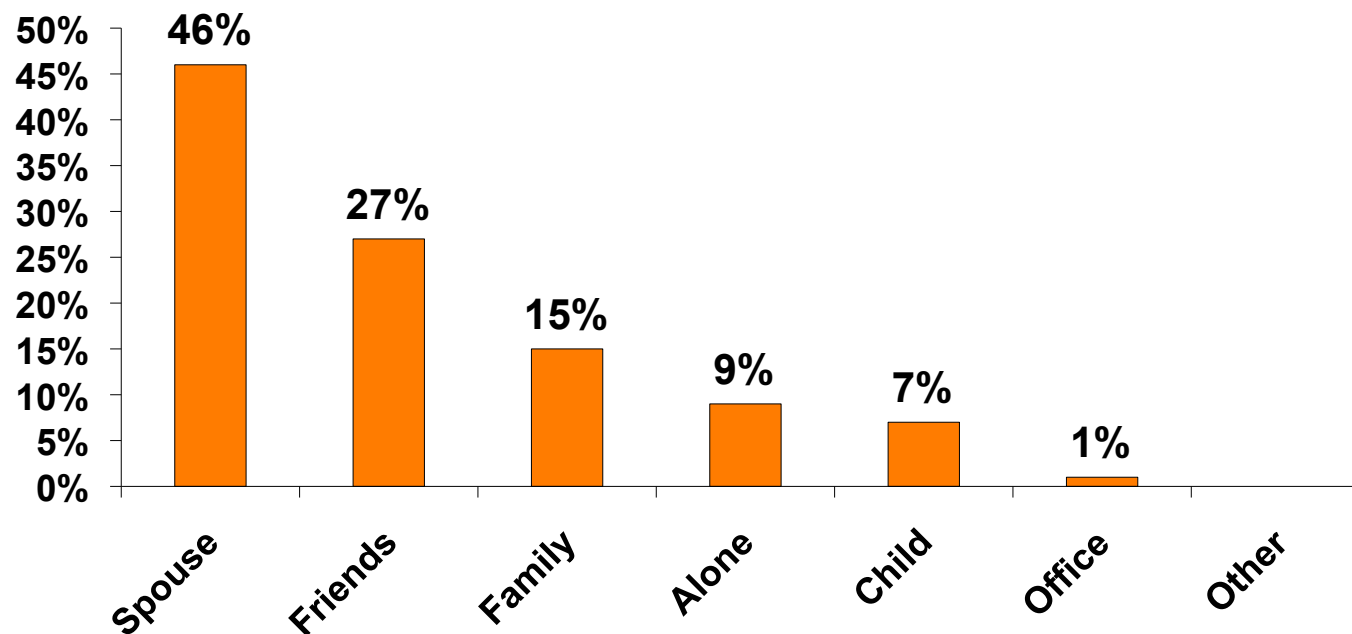
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE				
				Male	Female	<20	20-29	30-39	40-49	50+
PERSONAL INCOME	<240K	Count	6	3	3		5			1
			7%	6%	10%		12%			25%
	240K-1.0M	Count	69	46	23		35	25	6	3
			83%	88%	74%		81%	93%	75%	75%
	1.0M-3.0M	Count	5	2	3		2	2	1	
			6%	4%	10%		5%	7%	13%	
	3.0M+	Count	2		2		1		1	
			2%		6%		2%		13%	
	Refused	Count	1	1		1				
			1%	2%		100%				
Total	Count		83	52	31	1	43	27	8	4

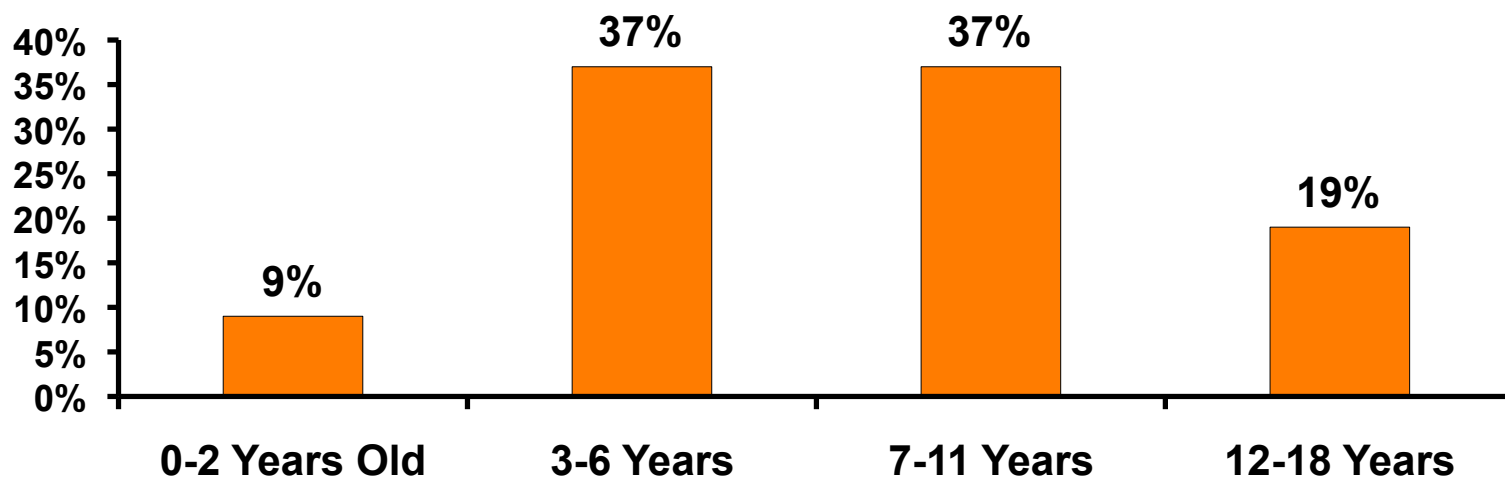
Travel Companions



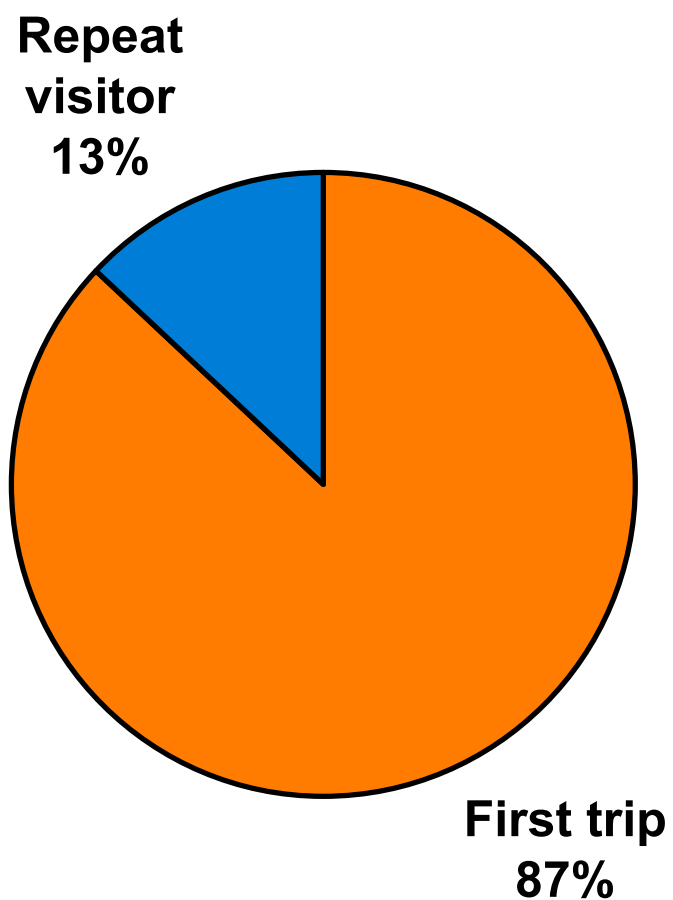
Number of Children Travel Party

N=11 total respondents traveling with children.

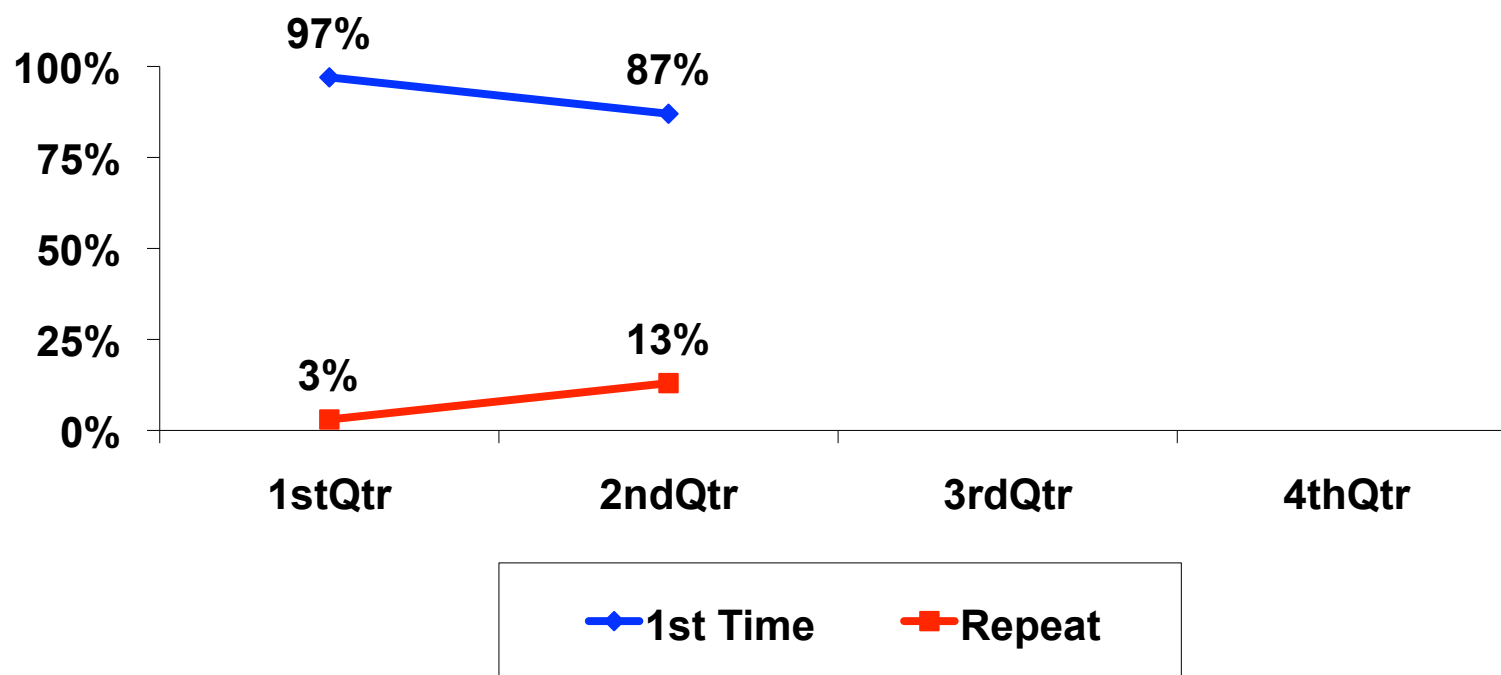
(Of those N=11 respondents, there is a total of 11 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



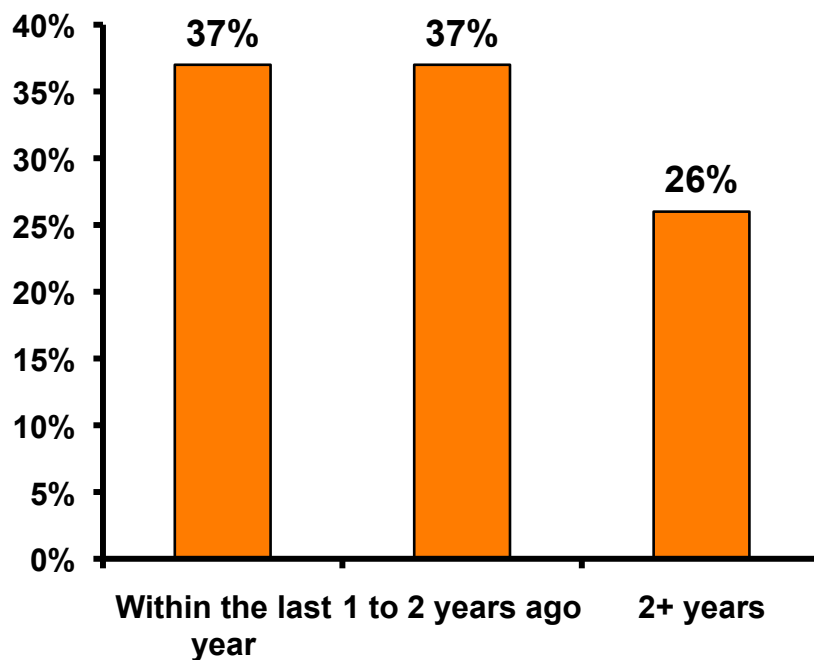
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1 st	Repeat
GENDER	Male	Count	98	88	10
			65%	68%	50%
	Female	Count	52	42	10
			35%	32%	50%
Total	Count		150	130	20
AGE	<20	Count	1	1	
			1%	1%	
	20-29	Count	75	65	10
			50%	50%	50%
	30-39	Count	47	44	3
			31%	34%	15%
	40-49	Count	19	14	5
			13%	11%	25%
	50+	Count	8	6	2
			5%	5%	10%
Total	Count		150	130	20

- Repeat visitors tend to be slightly older.

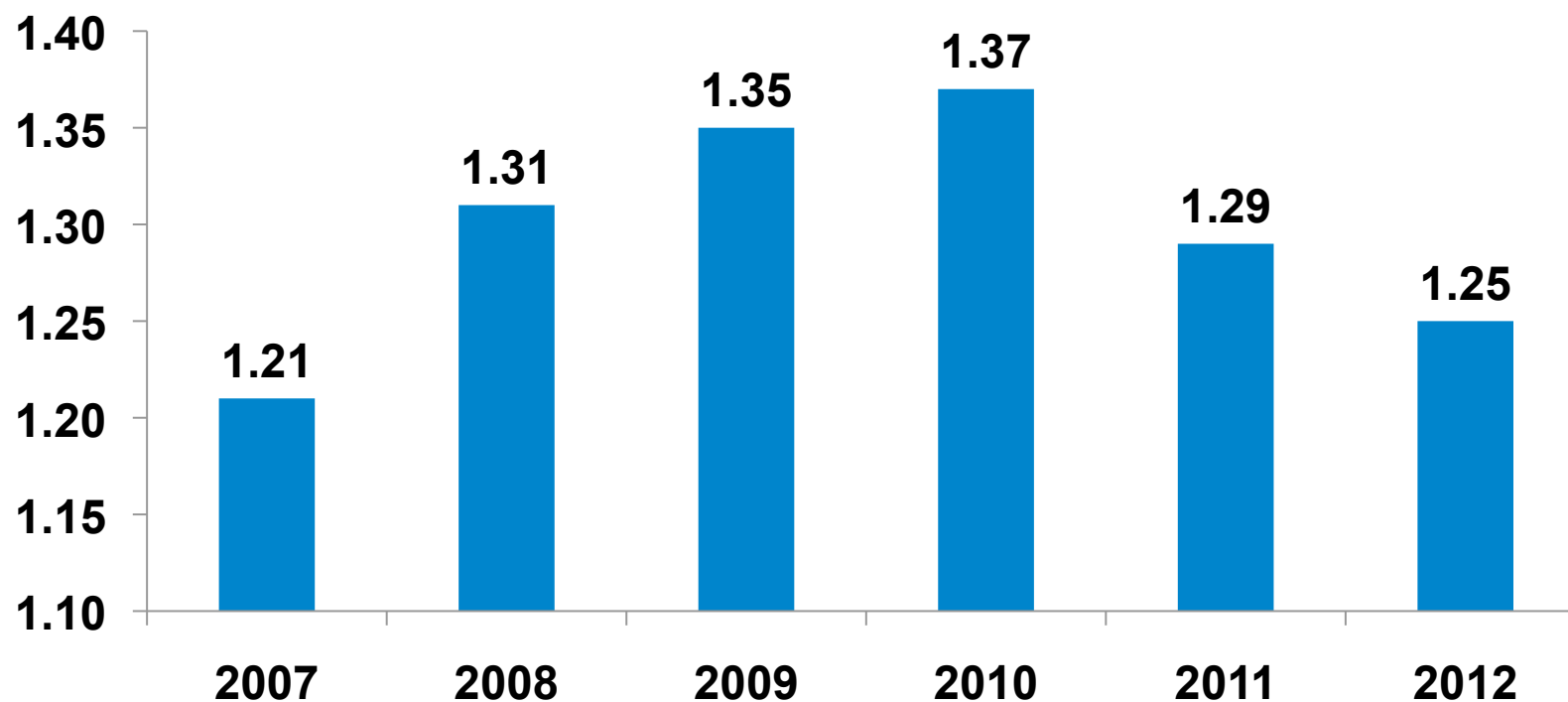
Repeat Visitors Last Trip

n = 19



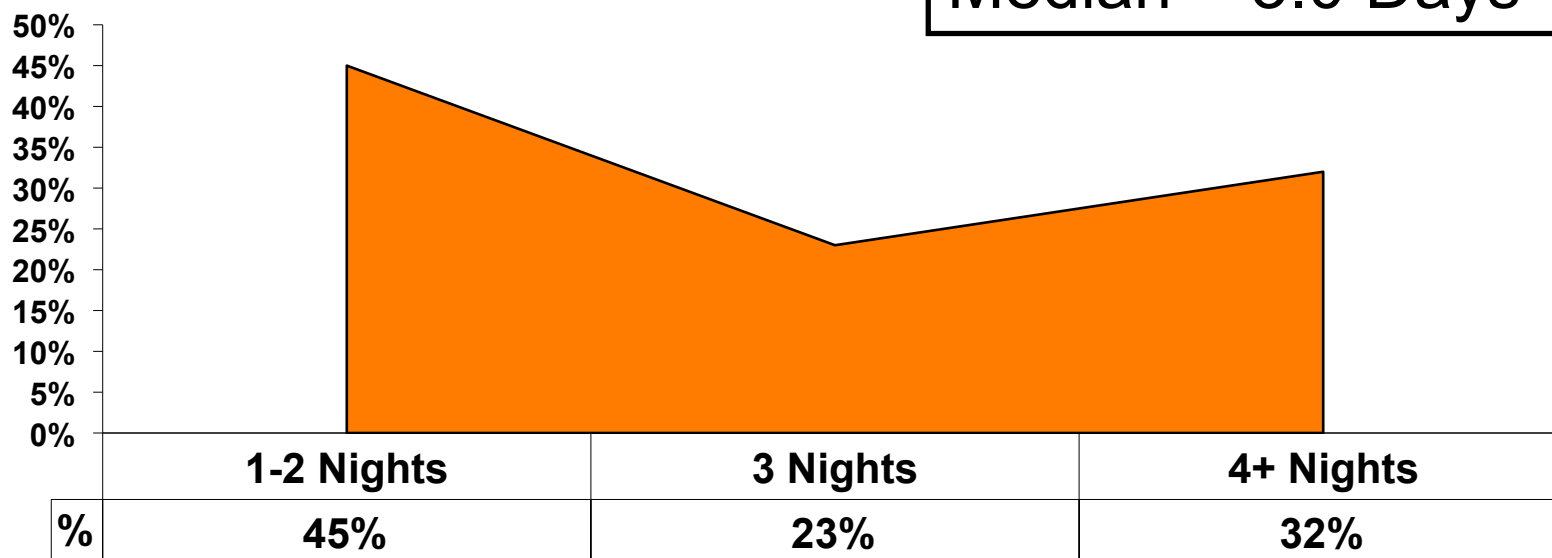
- The average repeat visitor has been to Guam 1.8 times.

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

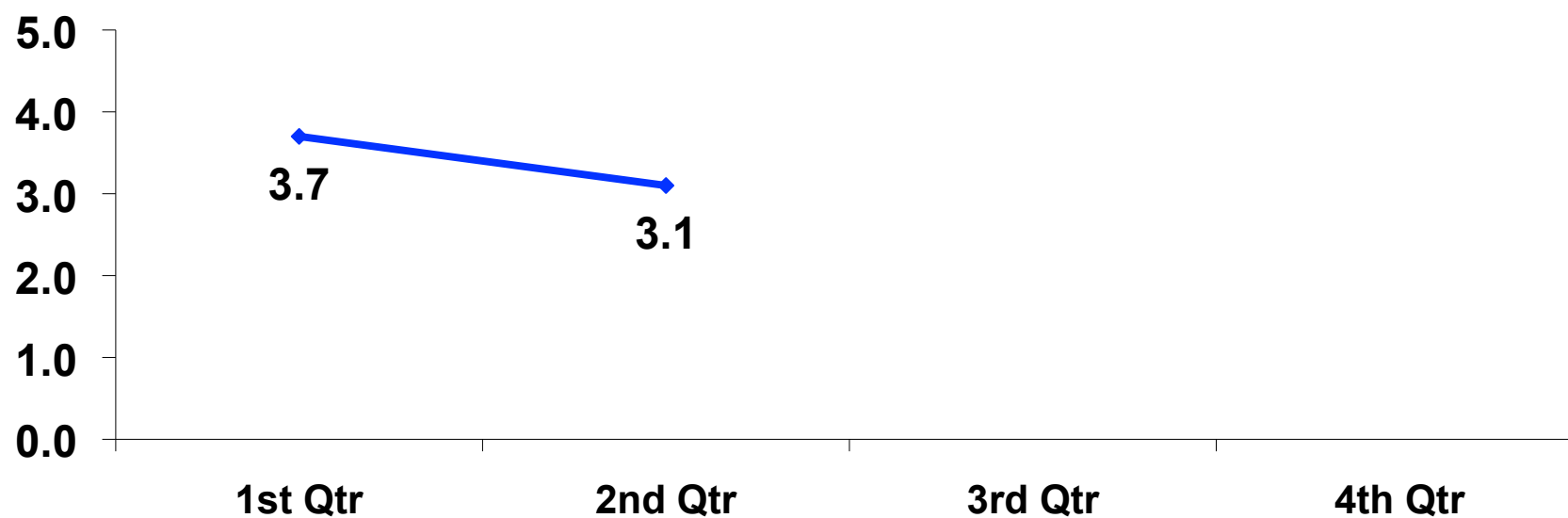


Length of Stay

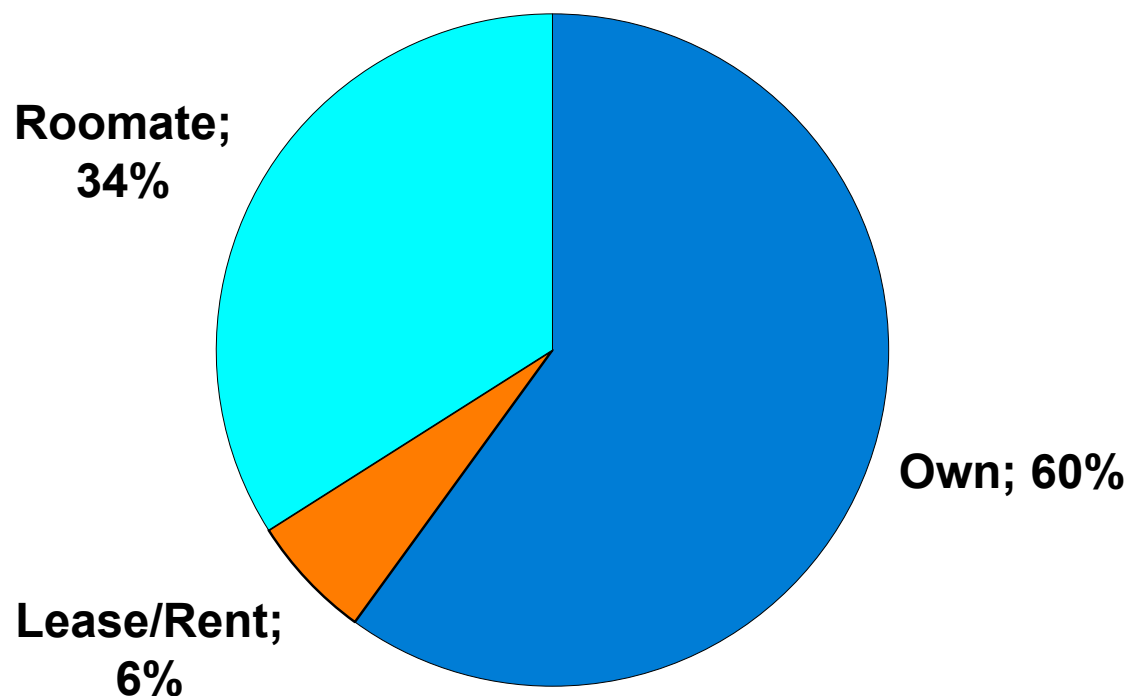
Mean = 3.10 Days
Median = 3.0 Days



Average Length of Stay



Living Accommodations

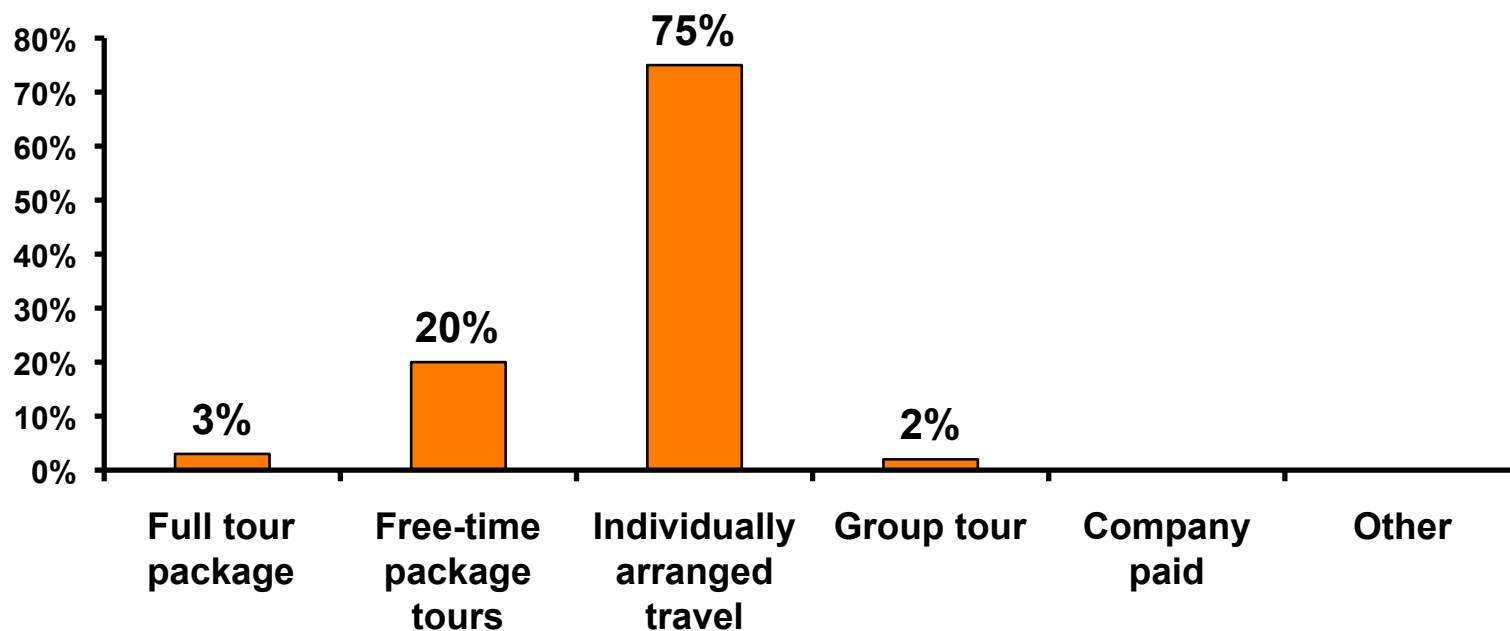


Occupation by Income

		TOTAL	PERSONAL INCOME				
			<240K	240K-1.0M	1.0M-3.0M	3.0M+	Refused
Q.33	Comp Emp-Office worker	41%	67%	37%			
	Comp Emp- Salesperson	21%	17%	29%			
	Professional/ Specialist	12%	17%	10%	25%		
	Govt-office worker	6%		10%			
	Skilled worker	6%		6%			
	Free-lancer	5%		3%	50%		
	Student	4%		2%	25%		100%
	Govt- Executive	2%				100%	
	Retired	3%		2%			
	Govt-Manager/Exec	1%		2%			
	Other	1%		2%			
Total	Count	108	6	63	4	2	1

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

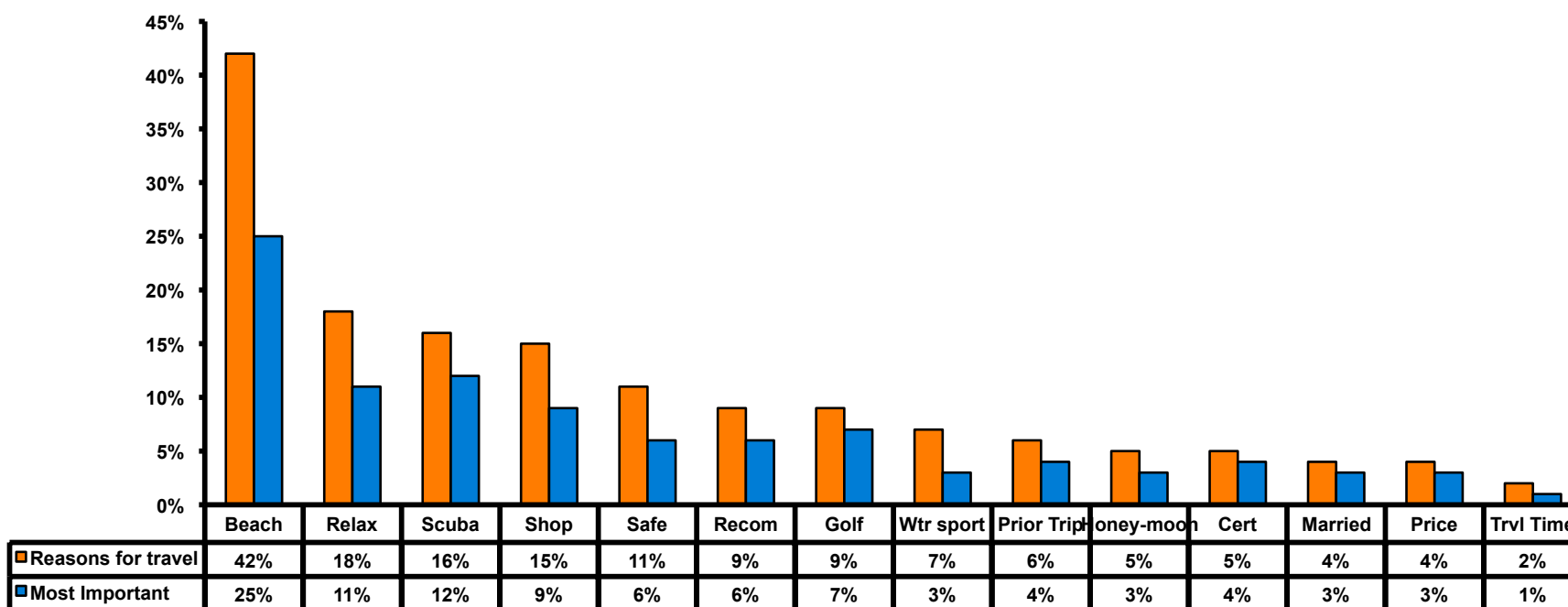


Accommodation by Income

Average length of stay: 3.10 days

		TOTAL	PERSONAL INCOME				
			<240K	240K-1.0M	1.0M-3.0M	3.0M+	Refused
Q.9	Hilton Guam Resort & Spa	56%	17%	48%	80%		100%
	Pacific Islands Club PIC	7%		10%			
	Oceanview Hotel	5%	50%	3%			
	Royal Orchid Guam	4%		4%	20%		
	Hotel Nikko Guam	3%		6%			
	Fiesta Resort Guam	3%		6%			
	Guam Marriott Resort Hotel	3%		4%		50%	
	Bayview Hotel	3%	17%	3%			
	Holiday Resort Guam	3%	17%	3%			
	Relatives, Friends, Home Stay	2%		4%			
	Hyatt Regency Guam	2%		1%		50%	
	Sheraton Laguna Resort	2%		3%			
	Leo Palace Resort	2%					
	Onward Beach Resort	1%		1%			
	Guam Reef Hotel	1%		1%			
	Pacific Bay Hotel	1%		1%			
	Outrigger Guam Resort	1%					
	The Westin Resort Guam	1%					
	Guam Plaza Hotel	1%					
	Total	Count	150	6	69	5	2

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Scuba and
- To relax

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	42%	100%	37%	45%	42%	63%	37%	52%
	Just to relax	18%	100%	15%	21%	16%	25%	17%	19%
	SCUBA diving	16%		23%	11%	11%		17%	13%
	Shopping	15%		13%	21%	5%	13%	16%	12%
	It is a safe place to spend a vacation	11%	100%	8%	15%	5%	25%	10%	13%
	Recommendation of friend, relative, travel agency	9%	100%	9%	2%	21%		9%	8%
	To golf	9%		7%	13%	11%		8%	10%
	Water sports	7%		9%	2%	5%	13%	4%	12%
	A previous visit	6%		4%	4%	16%	13%	5%	8%
	Honeymoon	5%		5%	6%	5%		6%	4%
	Career certification or testing	5%		8%	2%			4%	6%
	Price of the tour package	4%		4%	2%	11%		5%	2%
	To get married or Attend wedding	4%	100%	3%	4%	5%		3%	6%
	Short travel time	2%		1%	2%	5%		2%	2%
	Pleasure	2%		1%	2%		13%	1%	4%
	Promotional materials from GVB	1%		1%		5%			4%
	To visit friends or relatives	1%			2%				2%
	My company sponsored me	1%			2%				2%
Total	Cases	150	1	75	47	19	8	98	52

Motivation by Income

		TOTAL	PERSONAL INCOME				
			<240K	240K-1.0M	1.0M-3.0M	3.0M+	Refused
Q.5	Beautiful seas, beaches, tropical climate	42%	50%	43%	80%	50%	100%
	SCUBA diving	16%	17%	22%	20%		
	Just to relax	18%	17%	14%			100%
	Shopping	15%	17%	13%	20%	50%	
	It is a safe place to spend a vacation	11%	17%	14%			100%
	Recommendation of friend, relative, travel agency	9%		9%		50%	100%
	Water sports	7%	33%	4%	80%	50%	
	To golf	9%		6%		50%	
	A previous visit	6%	17%	9%			
	Career certification or testing	5%	50%	6%			
	Honeymoon	5%		7%			
	To get married or Attend wedding	4%		7%			100%
	Price of the tour package	4%		4%		50%	
	Short travel time	2%		1%	20%		
	Pleasure	2%		3%			
	To visit friends or relatives	1%		1%			
	My company sponsored me	1%		1%			
	Promotional materials from GVB	1%					
	Total	Cases	150	6	69	5	2

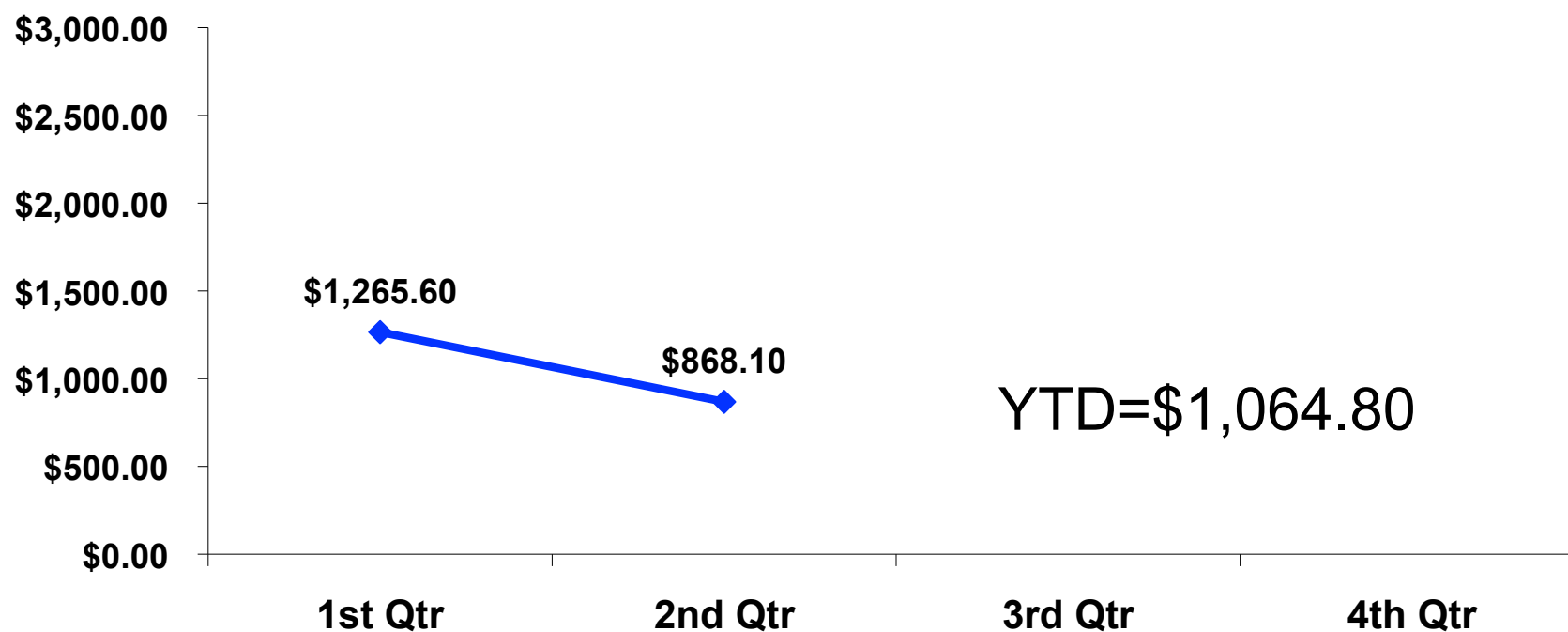
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

HKD 7.75/US\$1

- \$1,501.10 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$9,032 = maximum (highest amount recorded for the entire sample)
- \$868.10 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

HKD 7.75=\$1

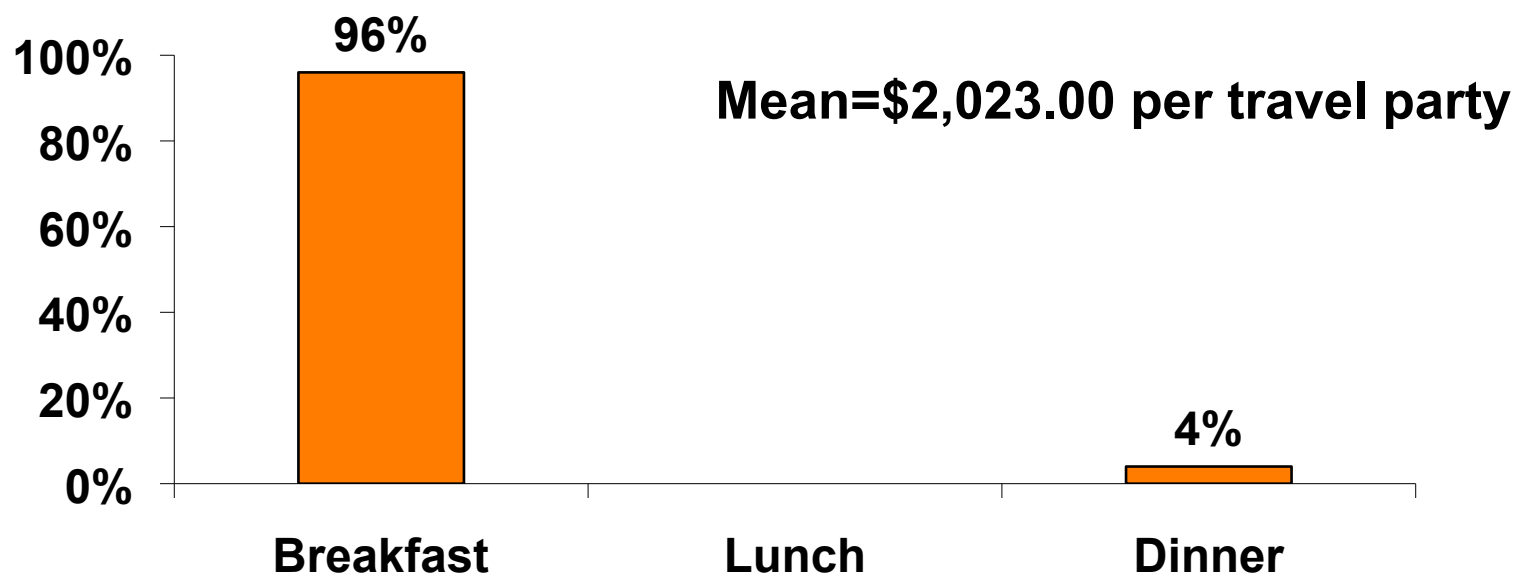
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$1,481.70
Air & Accommodation w/ daily meal package	\$2,023.00
Air only	\$2,477.40
Accommodation only	\$4,046.50
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$159.70
Ground transportation- Hong Kong	\$134.20
Ground transportation- Guam	\$101.60
Optional tours/ activities	\$510.30
Other expenses	\$538.20
Total Prepaid	\$1,501.10

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

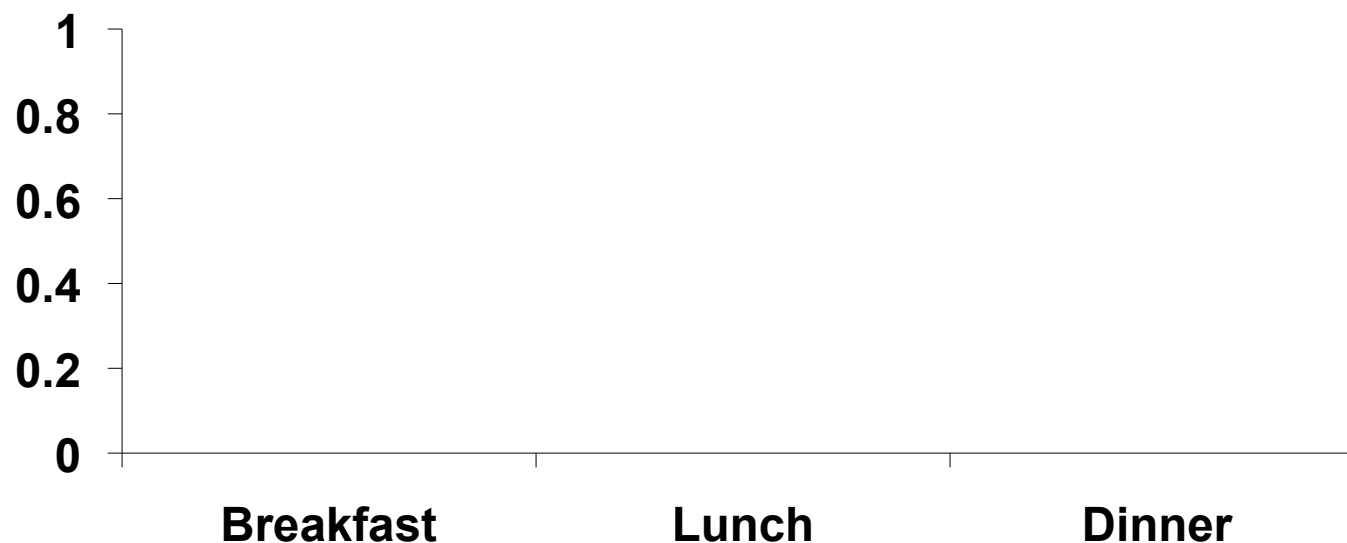
n=52



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

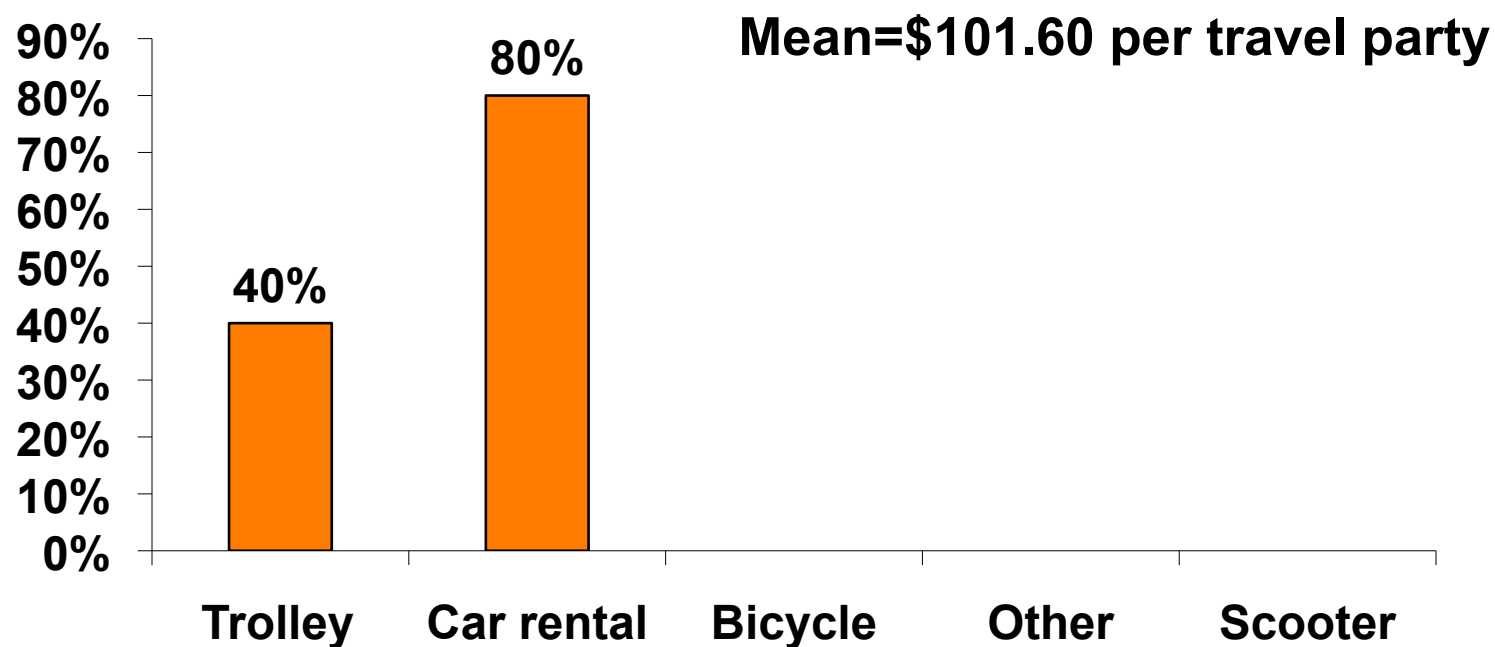
n= 0



Mean= \$xxx.xx per travel party

Prepaid Ground Transportation

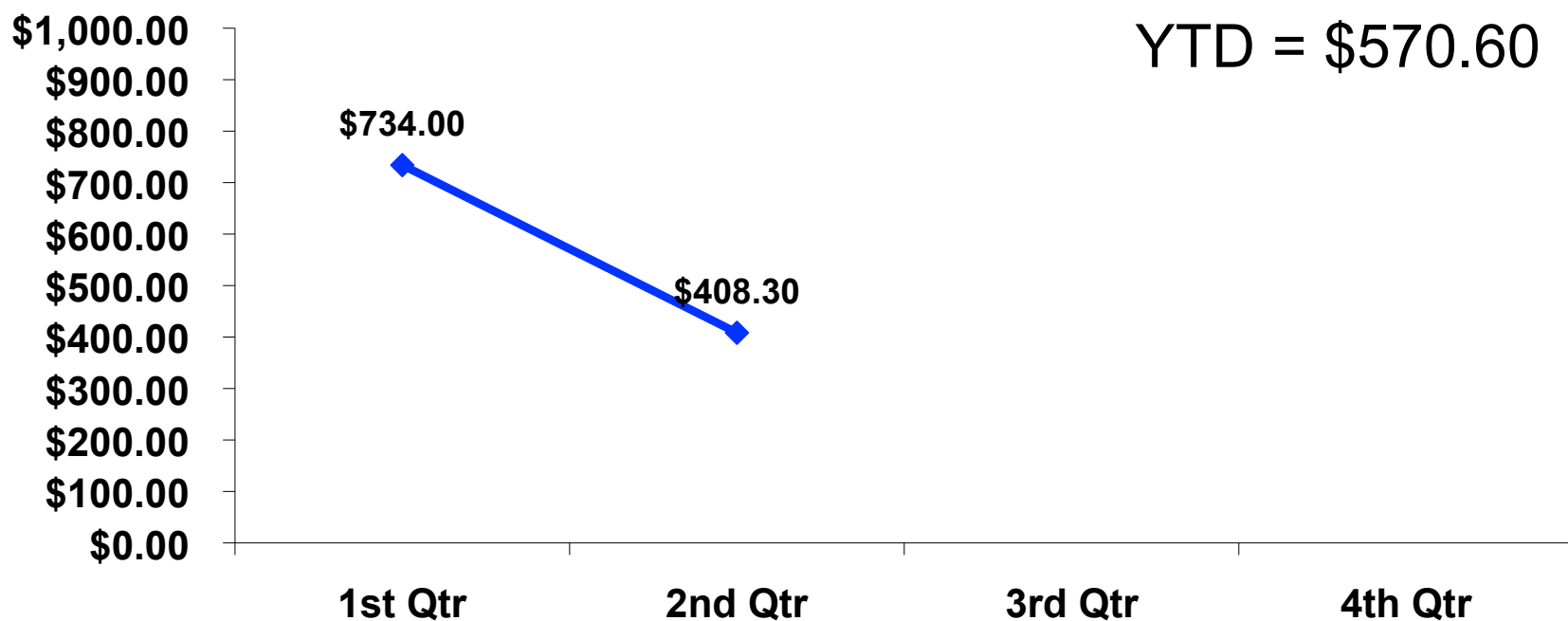
n=5



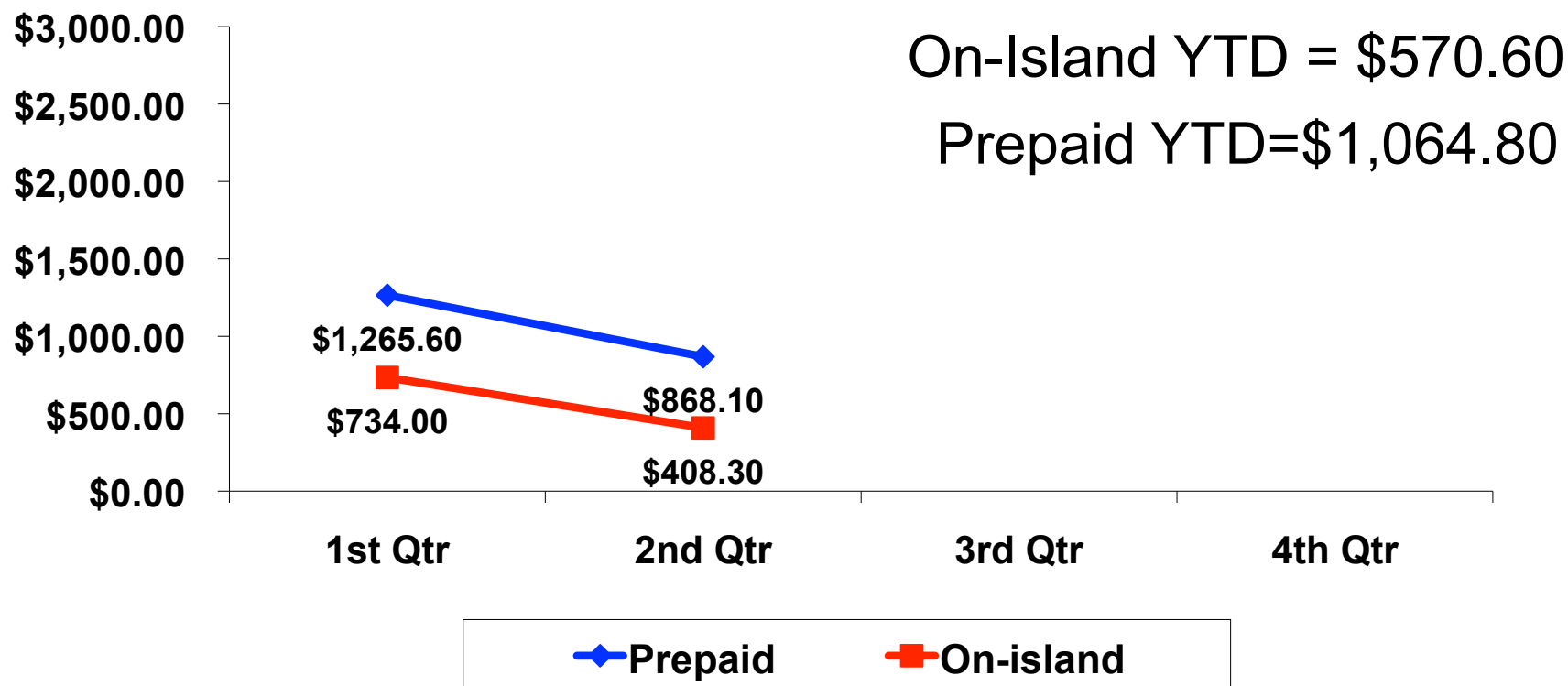
On-Island Expenditures

- \$697.80 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,865 = Maximum (highest amount recorded for the entire sample)
- \$408.30 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person



Prepaid/On-Island Expenditures Per Person



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER								
					Male					Female			
					AGE					AGE			
					<20	20-29	30-39	40-49	50+	20-29	30-39	40-49	50+
Q.11A	Mean	\$697.80	\$640.37	\$806.03	\$00	\$542.14	\$694.19	\$862.88	\$775.00	\$786.68	\$719.93	\$762.67	\$1,390.00
	Median	\$600	\$600	\$784	\$0	\$548	\$680	\$800	\$550	\$600	\$839	\$788	\$1,280

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$68.44	\$62.08	\$80.41	\$0.00	\$64.16	\$76.33	\$66.63	\$75.00
	Median	\$0	\$0	\$35	\$0	\$0	\$0	\$16	\$0
F&B-FF	Mean	\$30.17	\$24.23	\$41.37	\$0.00	\$34.15	\$19.36	\$40.79	\$35.00
REST/CONV	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$35.33	\$30.09	\$45.19	\$0.00	\$24.59	\$26.38	\$79.74	\$87.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$110.85	\$99.39	\$132.45	\$0.00	\$100.07	\$74.10	\$191.58	\$250.00
	Median	\$0	\$0	\$61	\$0	\$0	\$0	\$160	\$200
GIFT/ SOUV-SELF	Mean	\$94.46	\$90.49	\$101.94	\$0.00	\$75.55	\$138.15	\$68.95	\$87.50
	Median	\$0	\$0	\$100	\$0	\$0	\$0	\$0	\$50
GIFT/ SOUV- F&F AT HOME	Mean	\$55.55	\$49.97	\$66.08	\$0.00	\$42.76	\$61.02	\$66.21	\$125.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$14.36	\$12.14	\$18.53	\$0.00	\$13.75	\$11.44	\$13.95	\$40.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$10
OTHER EXP	Mean	\$288.77	\$271.97	\$320.44	\$0.00	\$267.84	\$300.06	\$319.21	\$382.50
	Median	\$30	\$0	\$55	\$0	\$0	\$168	\$8	\$290
TOTAL ON ISLAND	Mean	\$697.80	\$640.37	\$806.03	\$0.00	\$623.65	\$705.14	\$847.05	\$1,082.50
	Median	\$600	\$600	\$784	\$0	\$600	\$770	\$800	\$1,000

On-Island Expenditures

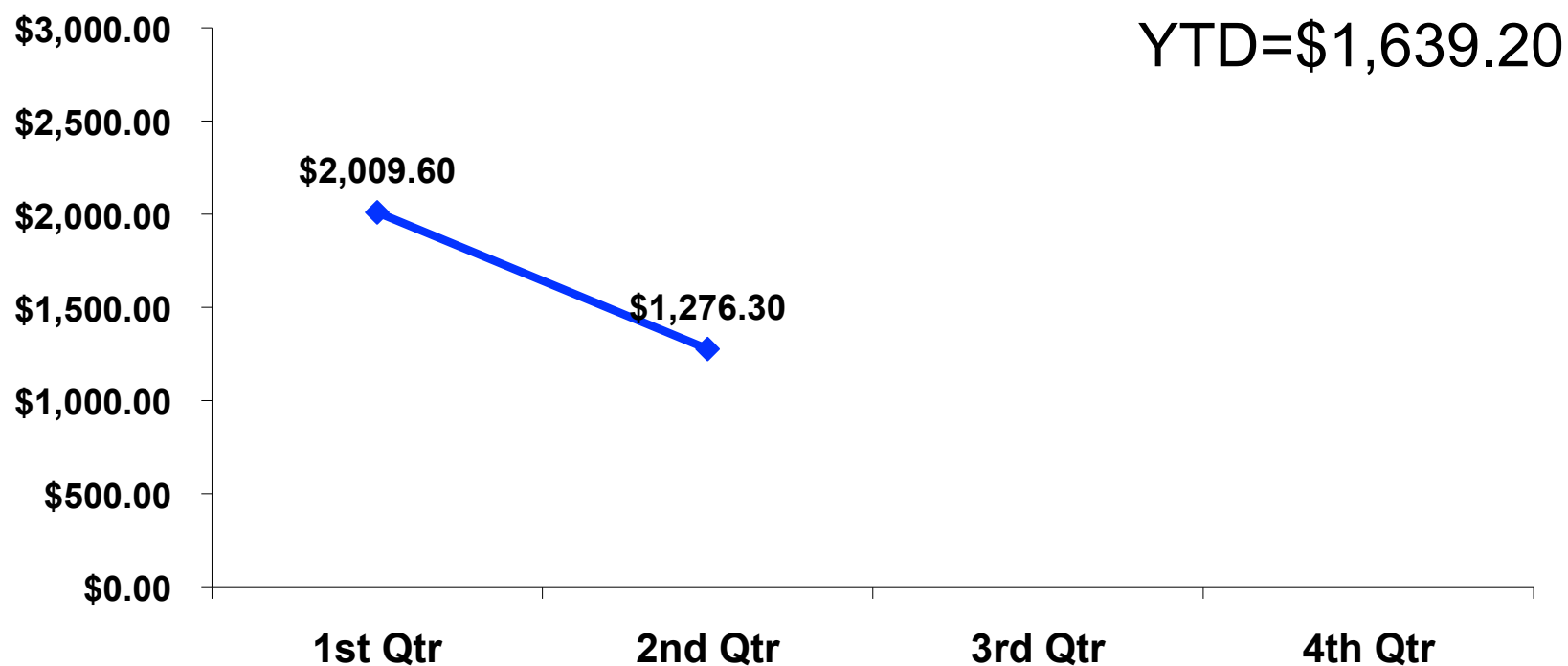
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$66.12	\$83.50
	Median	\$0	\$45
F&B-FF	Mean	\$25.66	\$59.50
REST/CONV	Median	\$0	\$25
F&B-OUT- SIDE	Mean	\$30.84	\$64.50
HOTEL/ REST	Median	\$0	\$10
OPTIONAL	Mean	\$107.67	\$131.50
TOUR	Median	\$0	\$0
GIFT/	Mean	\$93.15	\$103.00
SOUV-SELF	Median	\$0	\$100
GIFT/ SOUV-	Mean	\$55.68	\$54.75
F&F AT HOME	Median	\$0	\$10
LOCAL TRANS	Mean	\$13.24	\$21.60
	Median	\$0	\$10
OTHER EXP	Mean	\$292.10	\$267.15
	Median	\$30	\$27
TOTAL ON	Mean	\$684.30	\$785.50
ISLAND	Median	\$600	\$870

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,276.30 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,658 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

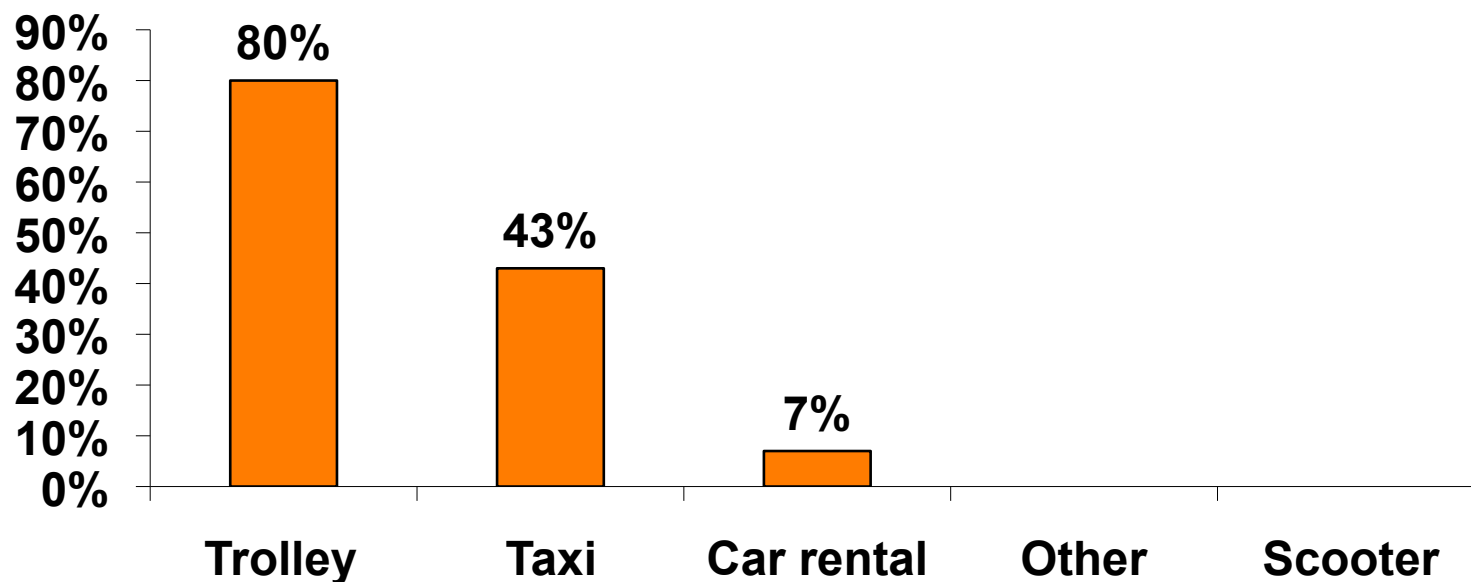


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$68.40
Food & beverage in fast food restaurant/ convenience store	\$30.20
Food & beverage at restaurants or drinking establishments outside a hotel	\$35.30
Optional tours and activities	\$110.90
Gifts/ souvenirs for yourself/companions	\$94.50
Gifts/ souvenirs for friends/family at home	\$55.60
Local transportation	\$14.40
Other expenses not covered	\$288.80
Average Total	\$697.80

Local Transportation

n=44



Mean=\$14.40 per travel party

Guam Airport Expenditures

- \$8.50 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$250 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

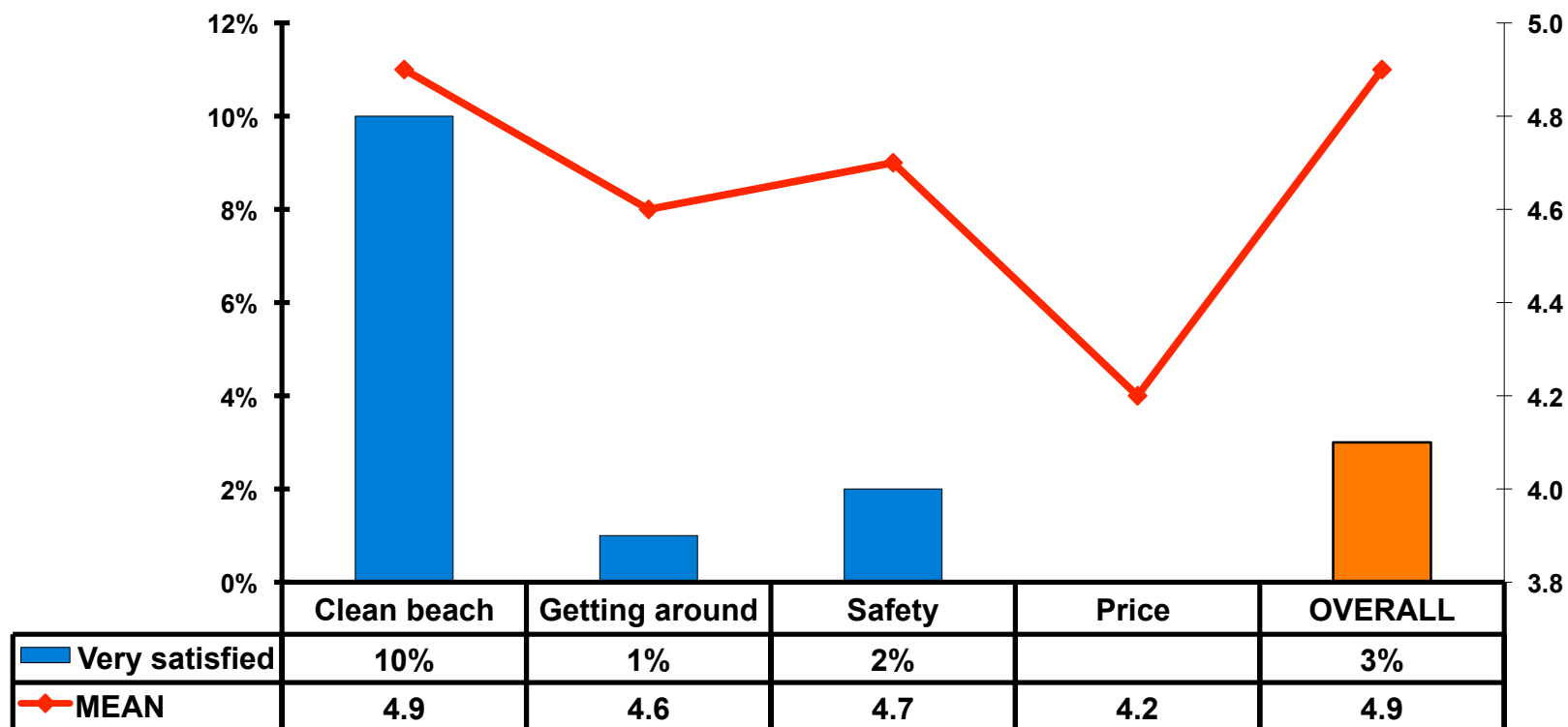
	MEAN \$
Food & Beverages	\$4.00
Gifts/Souvenirs Self	\$4.30
Gifts/Souvenirs Others	\$.10
Total	\$8.50

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

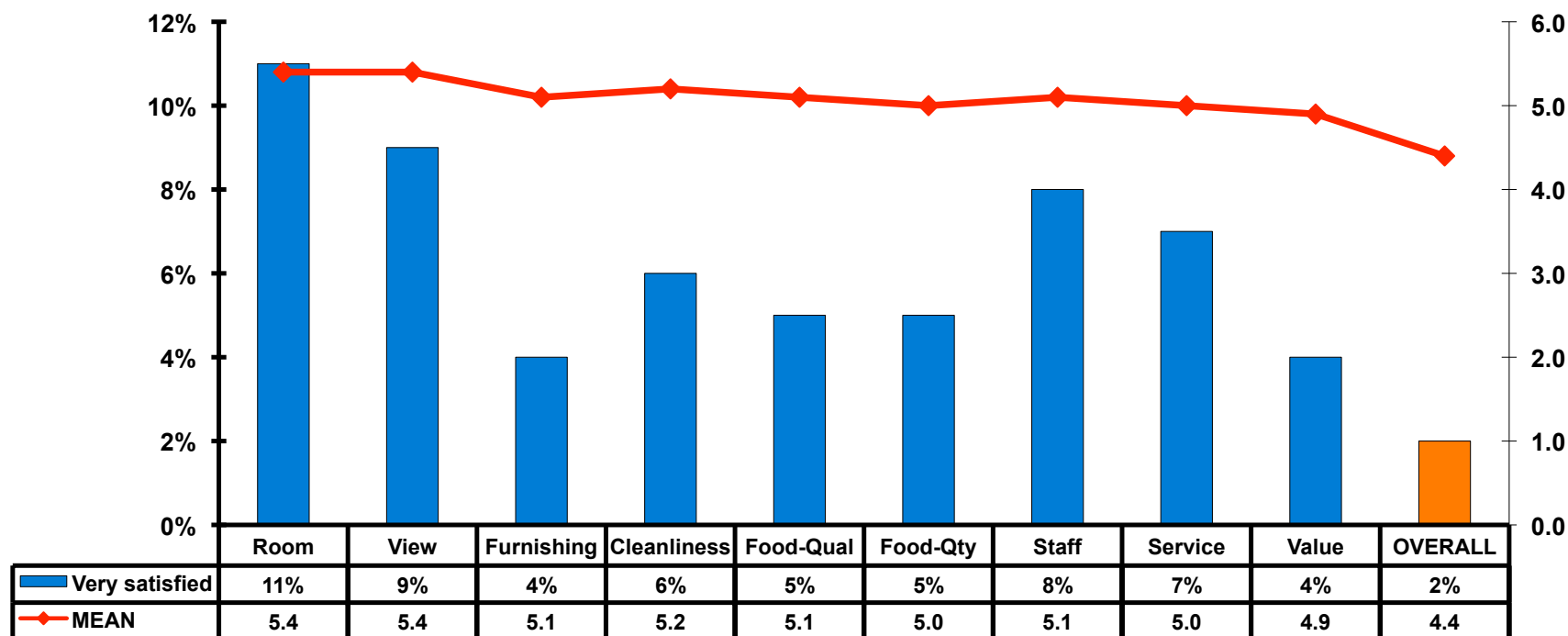
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

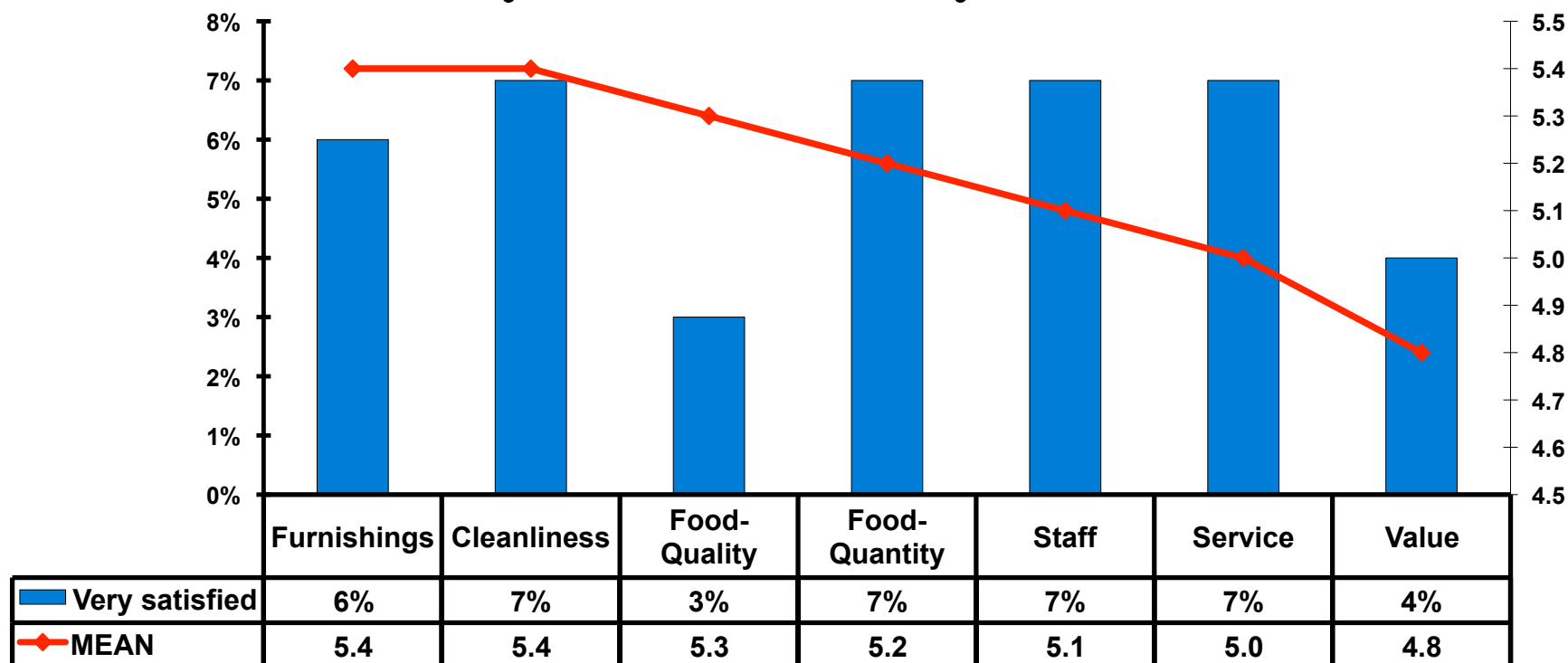
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

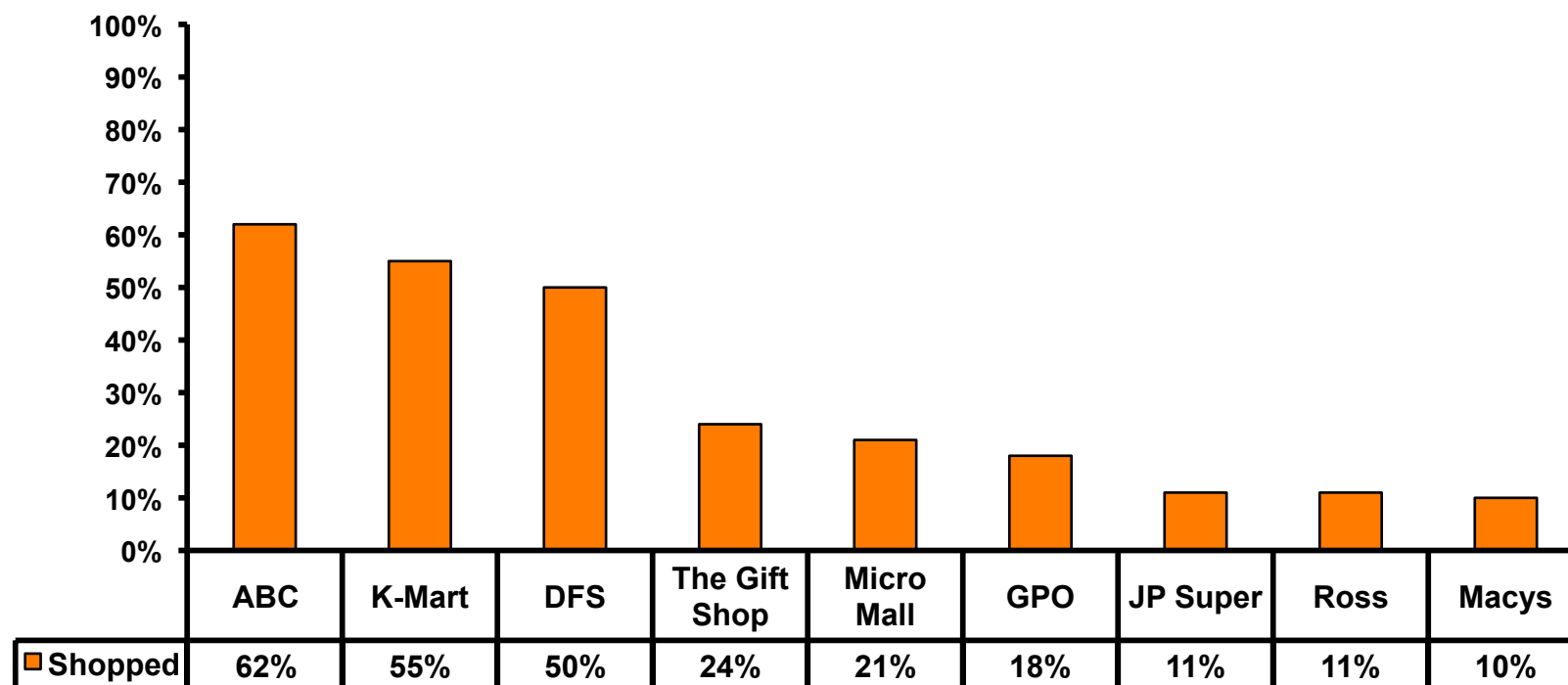
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

7pt Rating Scale

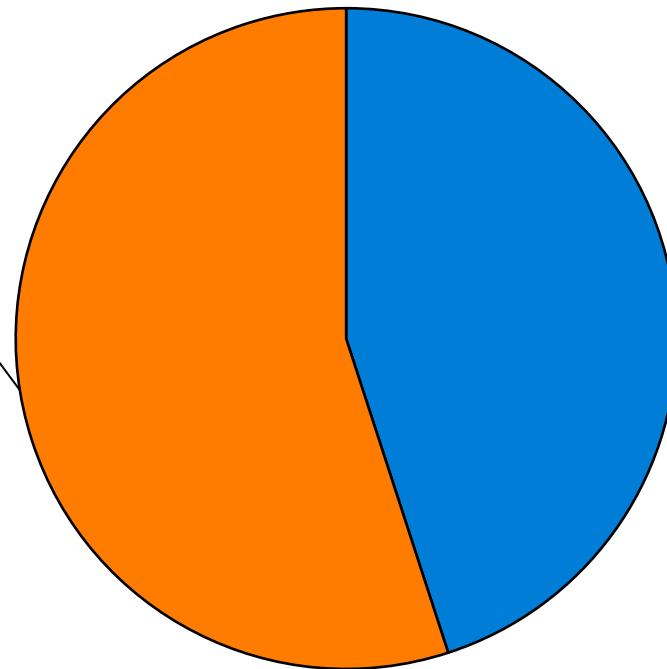
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 12%	Score of 6 to 7 = 11%
Score of 4 to 5 = 81%	Score of 4 to 5 = 79%
Score 1 to 3 = 7%	Score 1 to 3 = 11%
MEAN = 4.4	MEAN = 4.3

Optional Tour Participation

- Average number of tours participated in is .9

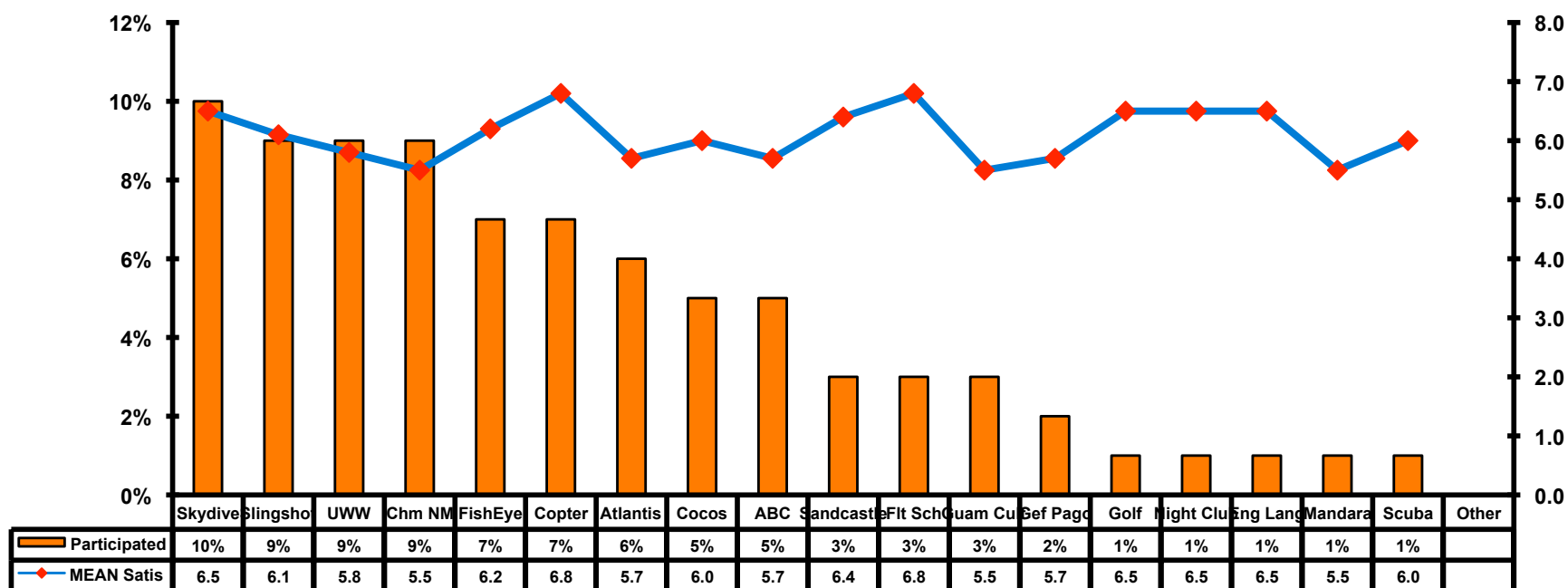
**One or more
55%**



**None
45%**

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 = 21%	Score of 6 to 7 = 15%
Score of 4 to 5 = 78%	Score of 4 to 5 = 81%
Score 1 to 3 = 1%	Score 1 to 3 = 4%
MEAN = 4.7	MEAN = 4.6

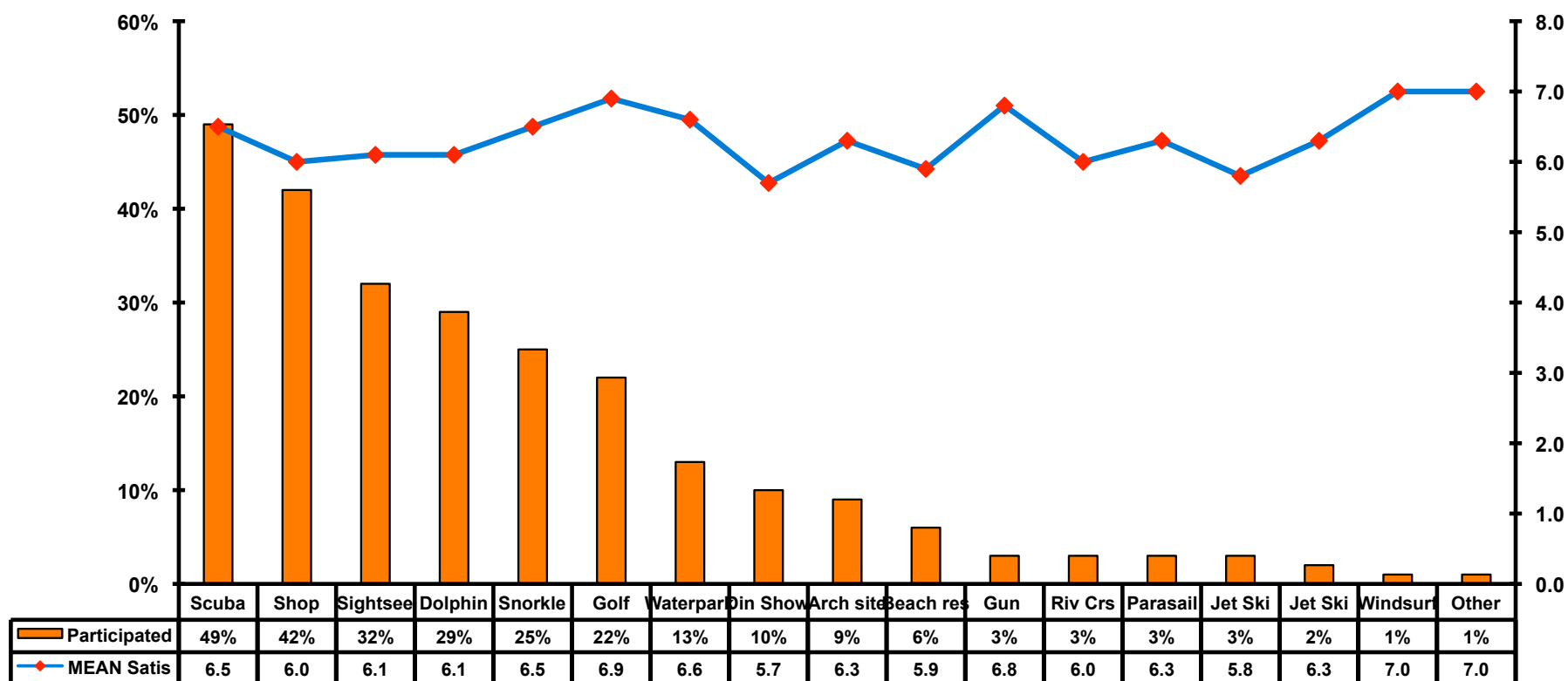
Night Tours Satisfaction

7pt Rating Scale

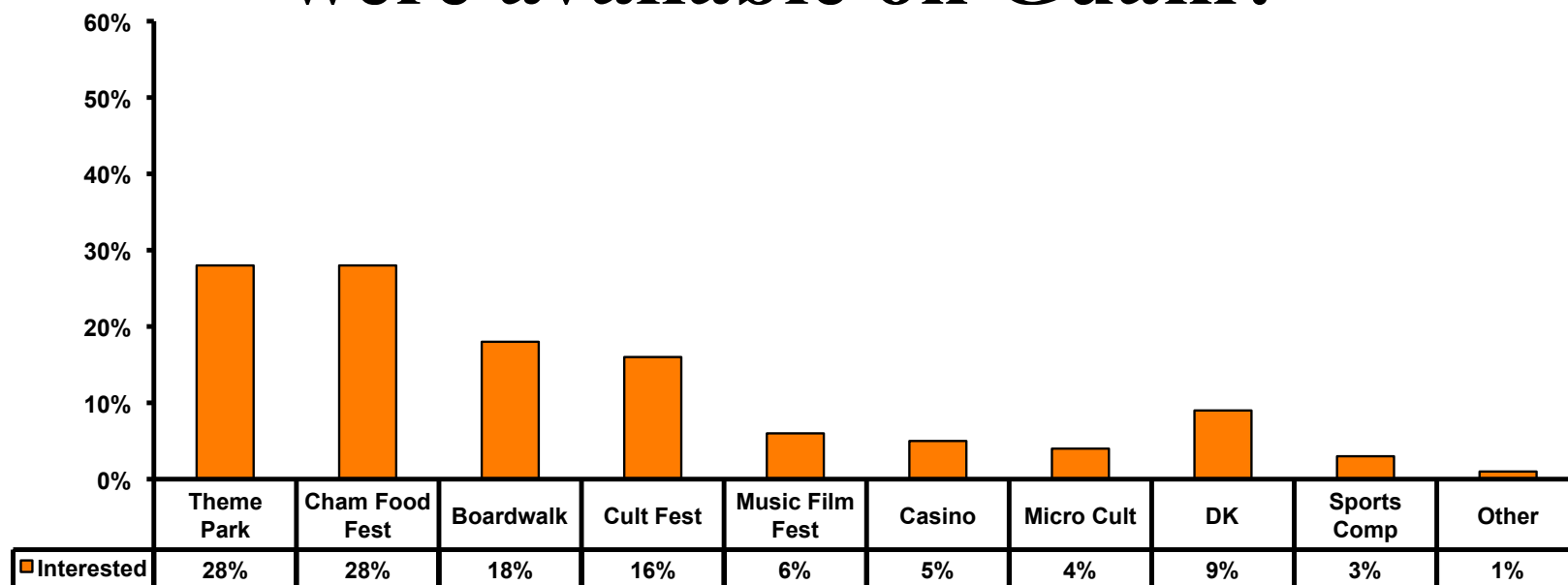
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 14%	Score of 6 to 7 = 13%
Score of 4 to 5 = 80%	Score of 4 to 5 = 78%
Score 1 to 3 = 7%	Score 1 to 3 = 8%
MEAN = 4.5	MEAN = 4.4

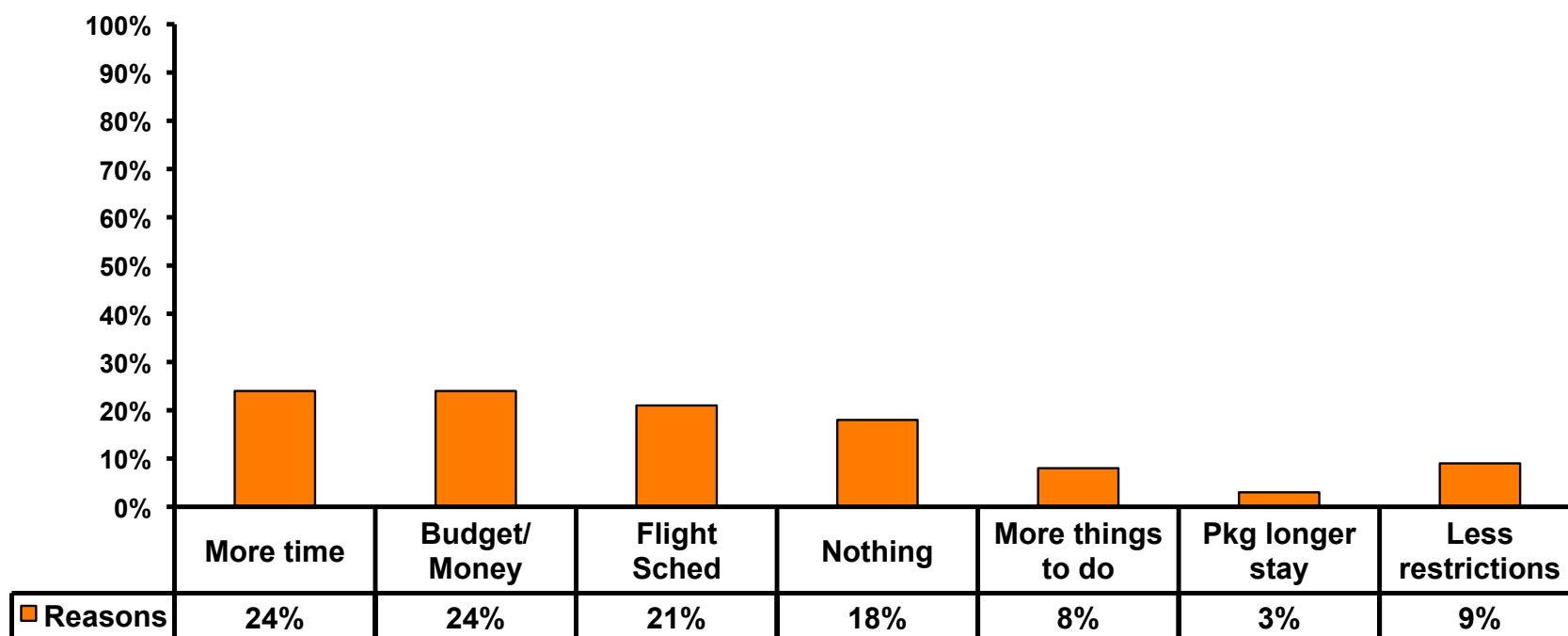
Satisfaction with Other Activities



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



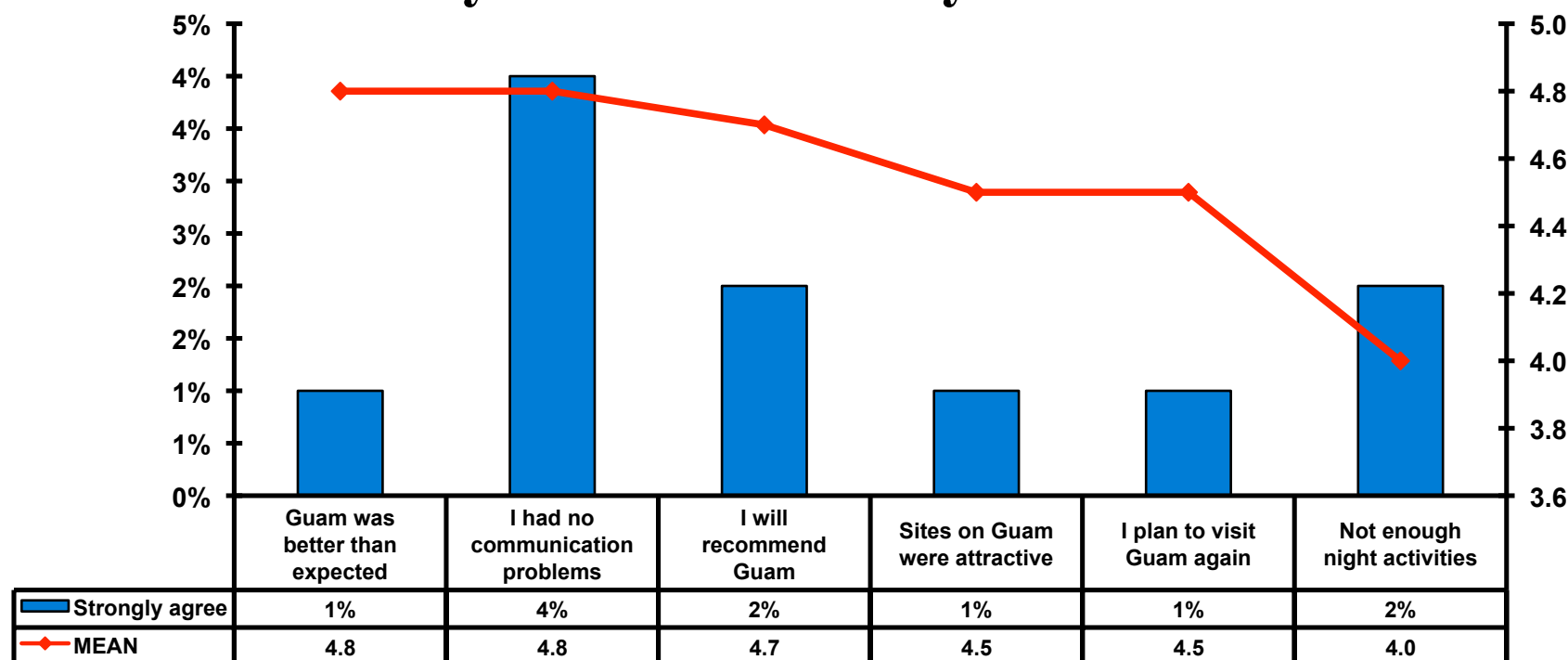
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

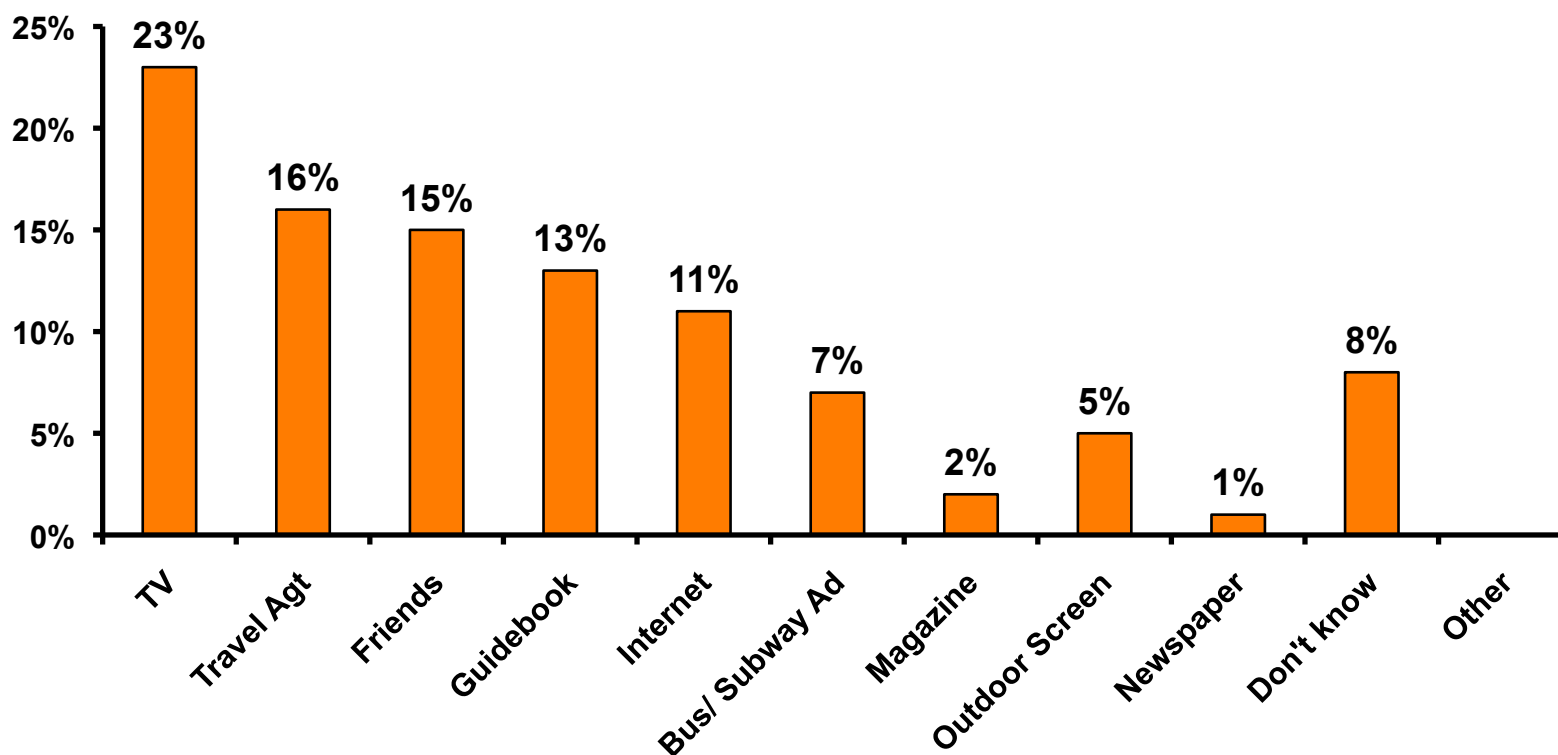
7=Very Satisfied/ 1=Very Dissatisfied



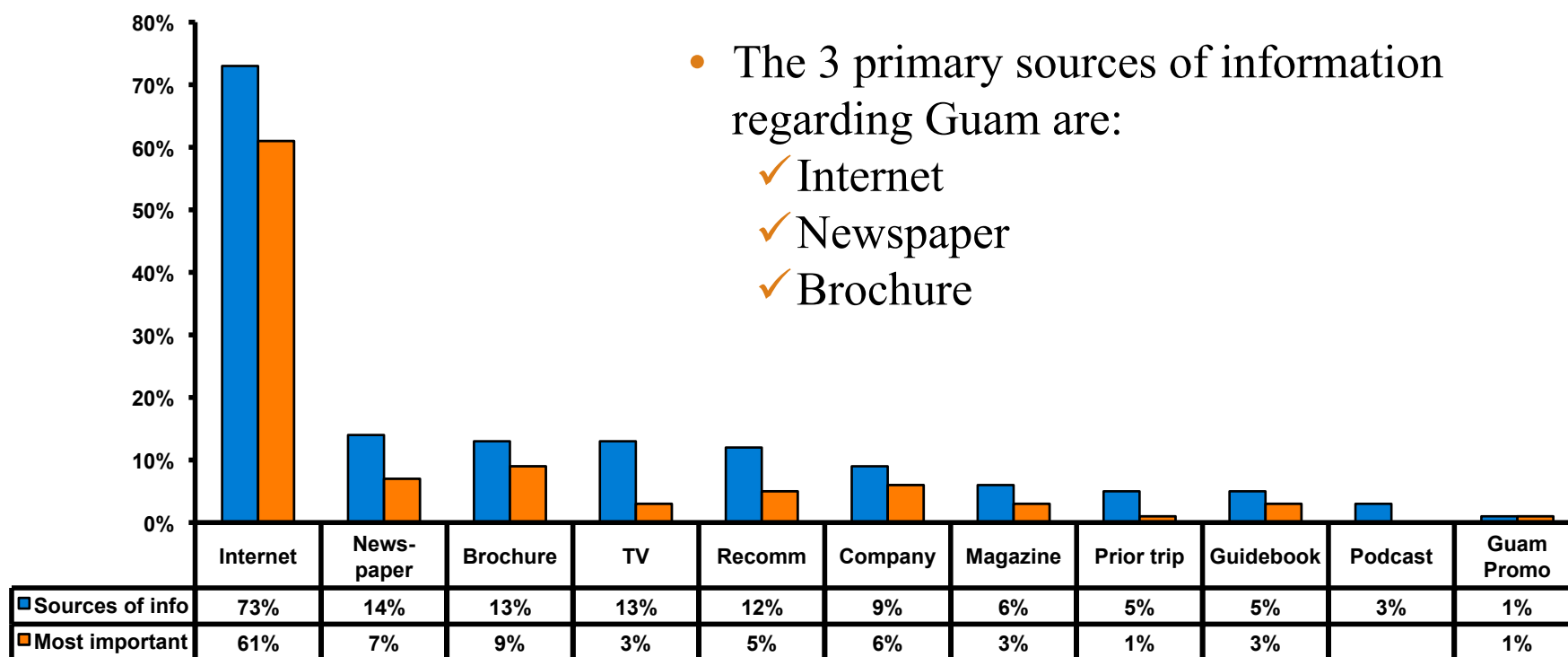
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

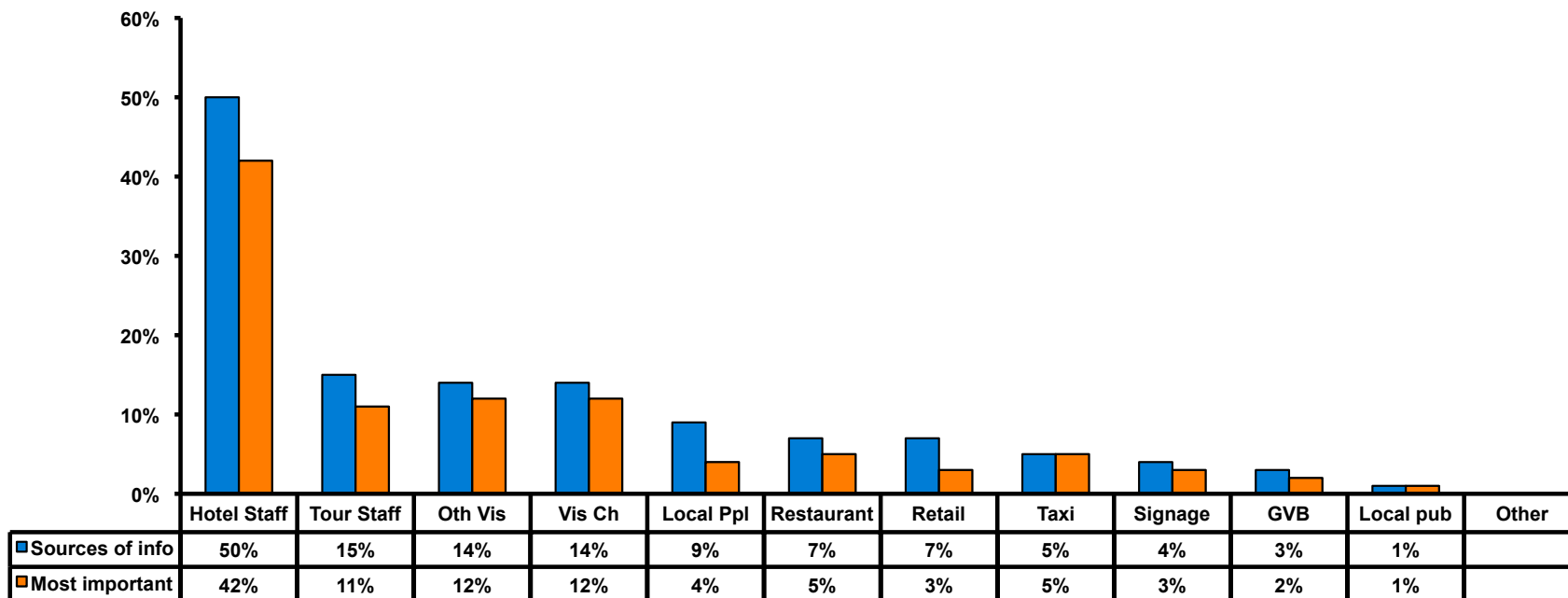


Sources of Information Pre-arrival

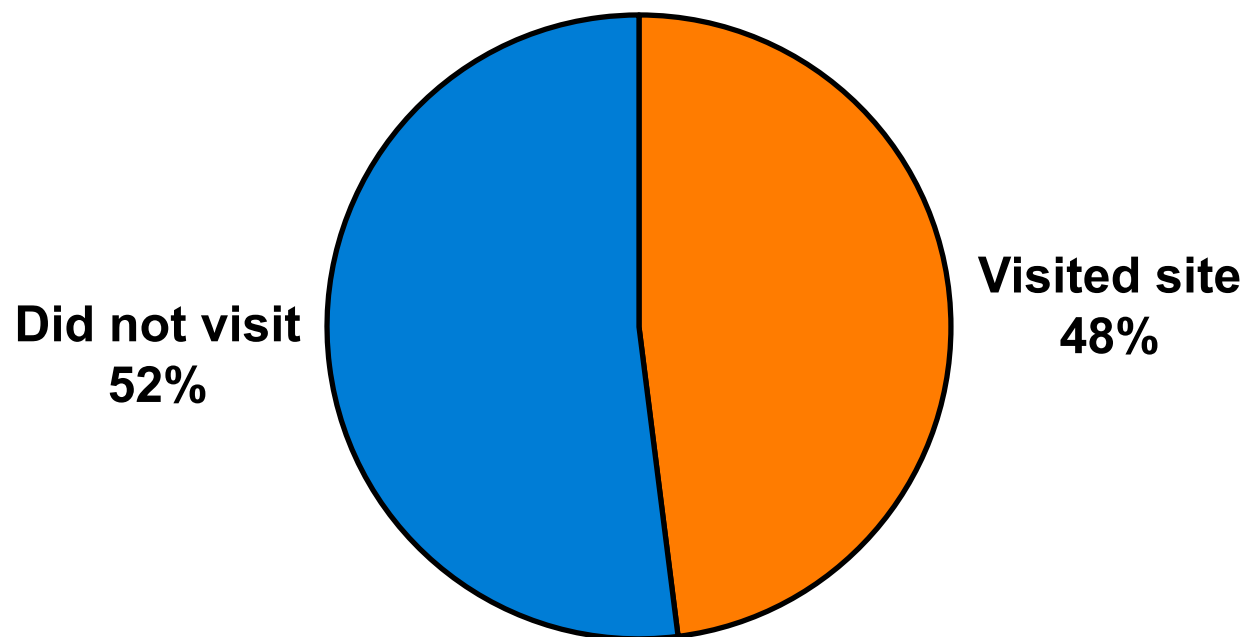


Sources of Information Post-arrival

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

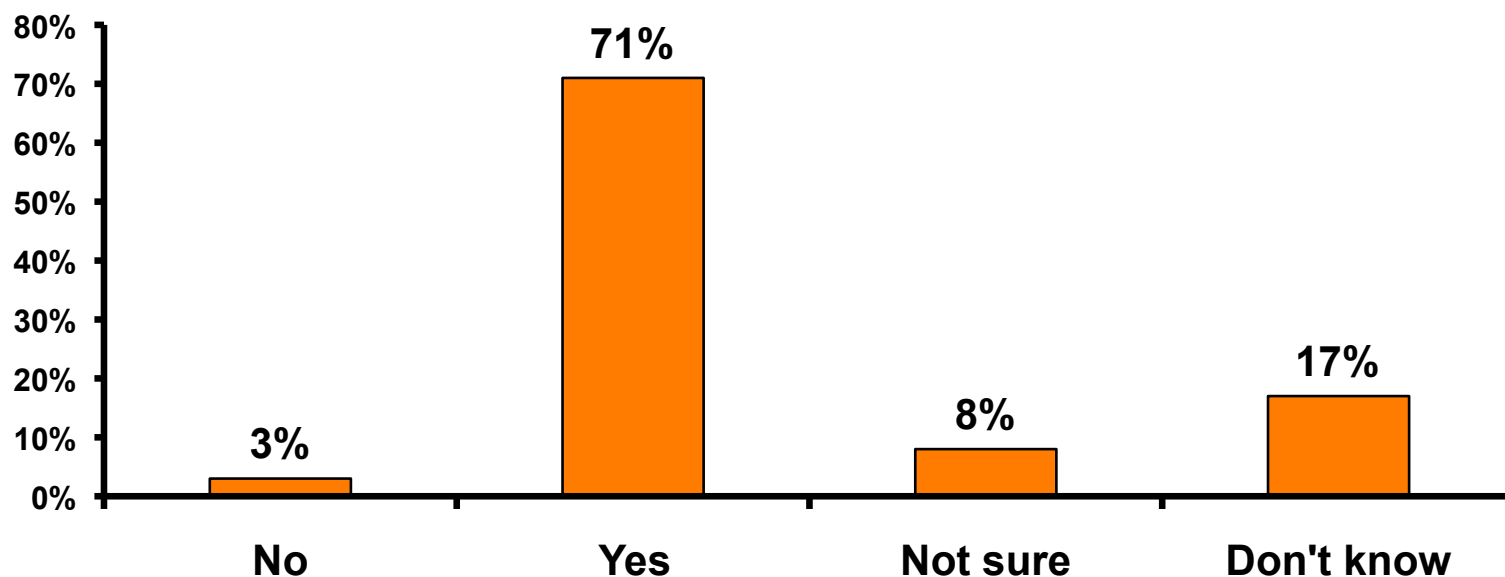


GVB Website



SECTION 6 **OTHER ISSUES**

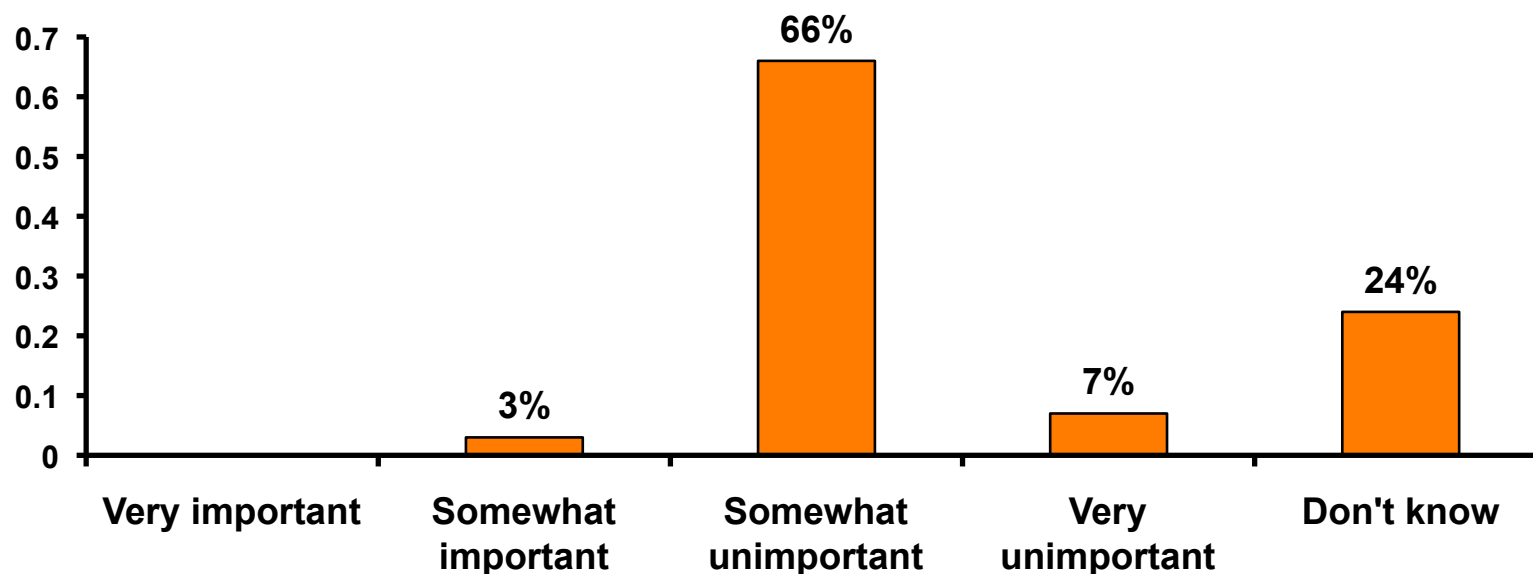
Good time to spend money on travel outside of Hong Kong



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		3%	7%				6%			
	Yes		75%	77%	58%	50%	83%	71%	80%	100%	
	Not sure	100%	4%	9%	11%	25%		13%			100%
	Do not know		19%	7%	32%	25%	17%	10%	20%		
Total	Count	1	75	44	19	8	6	68	5	2	1

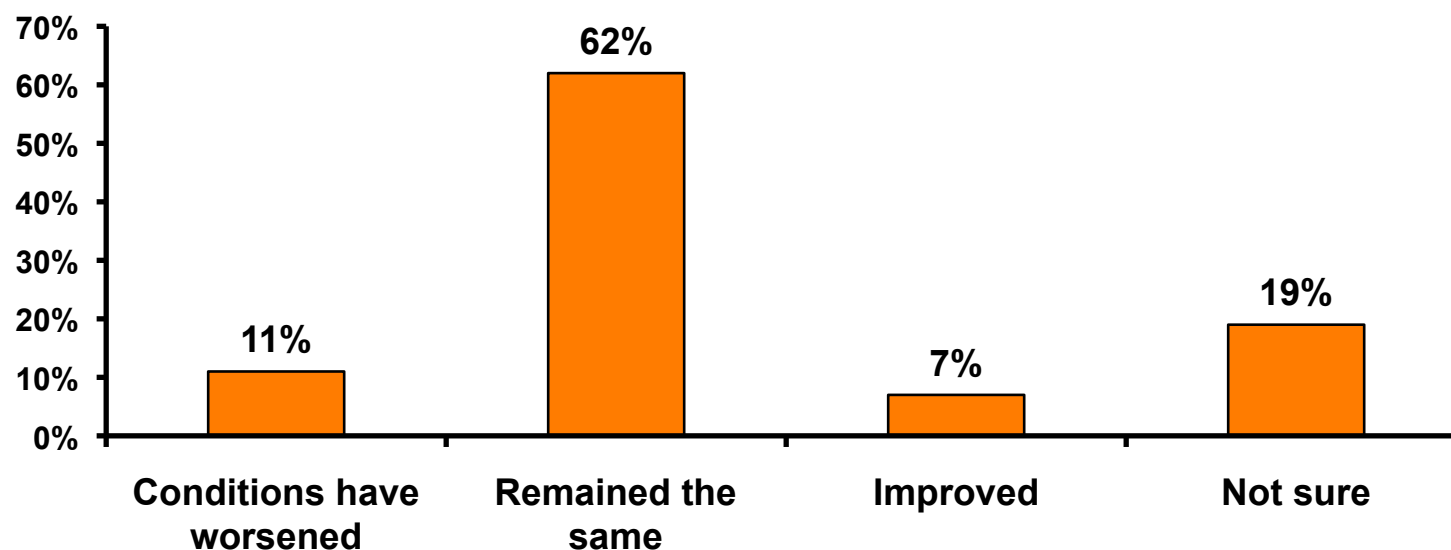
The importance of the state of the Hong Kong economy in decision to travel outside of Hong Kong



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		9%	7%				12%	20%		
	Somewhat unimportant		68%	67%	61%	63%	83%	68%	40%	50%	
	Somewhat important		1%	9%				3%	20%		
	Don't know	100%	21%	17%	39%	38%	17%	18%	20%	50%	100%
Total	Count	1	75	46	18	8	6	68	5	2	1

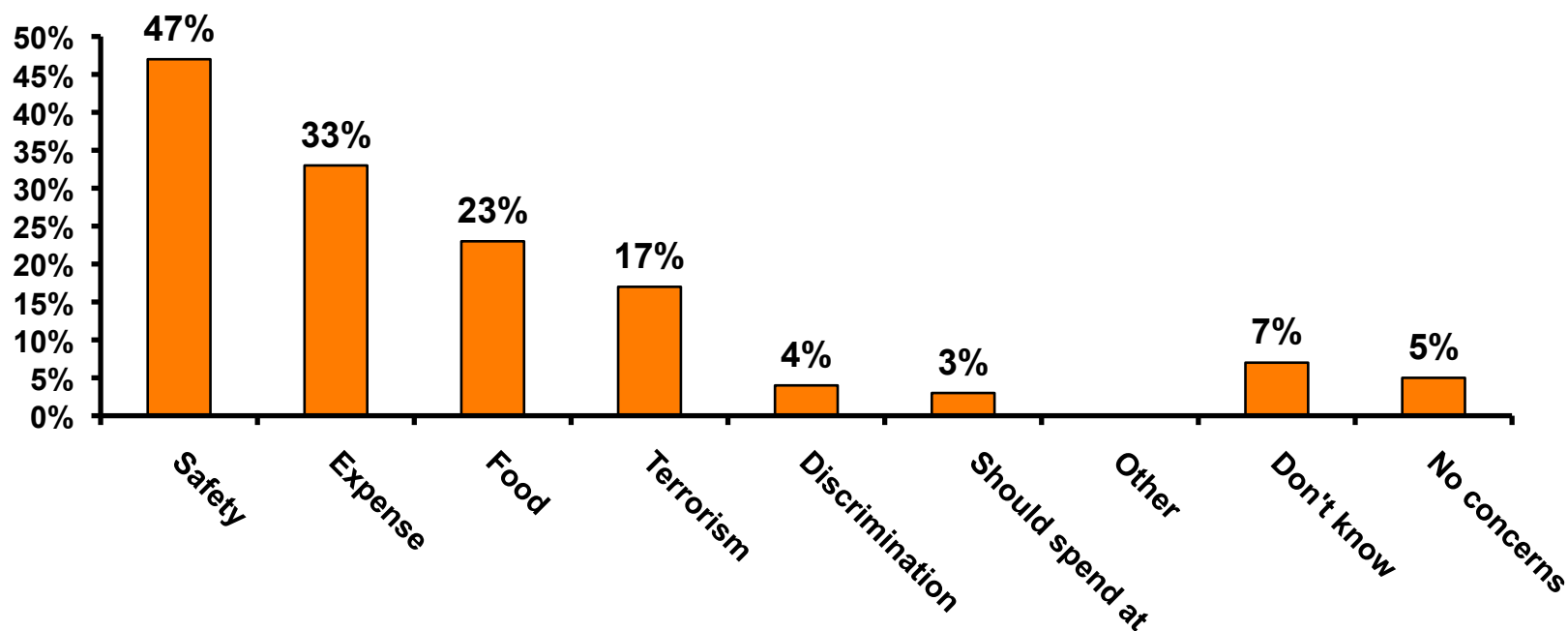
Rating Hong Kong Economy Compared to 12 months ago



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%	17%	5%		17%	15%	20%		100%
	Conditions have remained the same		61%	68%	47%	75%	67%	68%	20%	50%	
	Conditions have improved		5%	4%	21%	13%	17%	4%	40%		
	Do not know		24%	11%	26%	13%		13%	20%	50%	
Total	Count	1	74	47	19	8	6	68	5	2	1

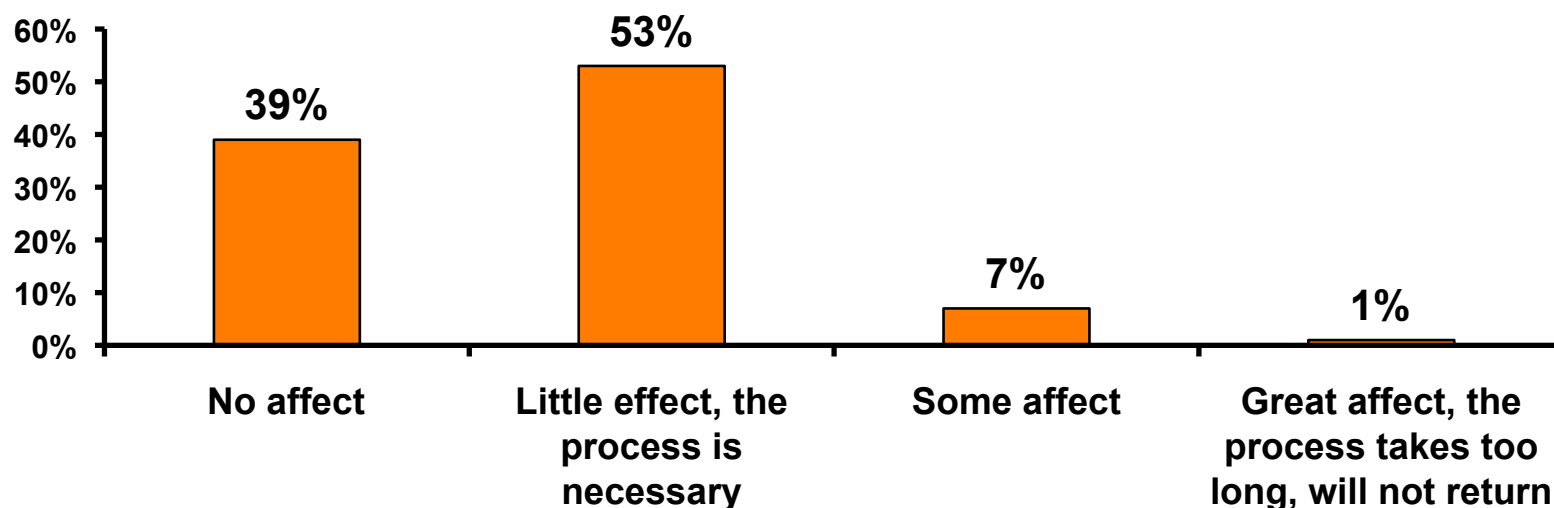
Concerns about travel outside of Hong Kong - Overall



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%	48%	39%	58%	50%	100%	41%	50%	100%	100%
	Expense	100%	35%	28%	42%	13%	33%	43%	25%	50%	100%
	Food	100%	17%	26%	37%	25%	17%	22%			100%
	Terrorism	100%	16%	15%	21%	25%	50%	22%	25%		100%
	Don't know		11%	4%		13%		4%	25%		
	No concerns		4%	9%				4%	25%		
	Discrimination against Hong Kong	100%	3%	4%	5%			4%			100%
	Spending money abroad when it should be spent at home	100%	3%	2%				3%			100%
Total	Cases	1	75	46	19	8	6	69	4	2	1

Security Screening/ Immigration Process at Guam International Airport

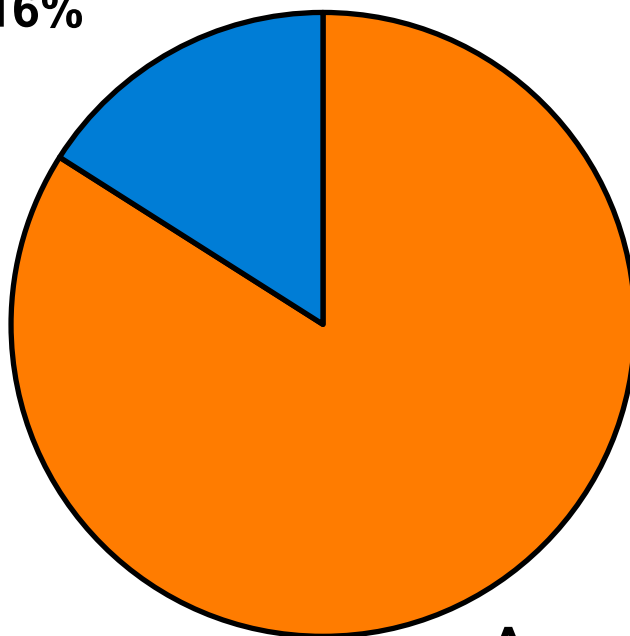


Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **3.8** out of possible 7.0
- Agree (Score 6-7) – **9%**
- Neutral (Score 4-5) – **50%**
- Disagree (Score 1-3) – **41%**

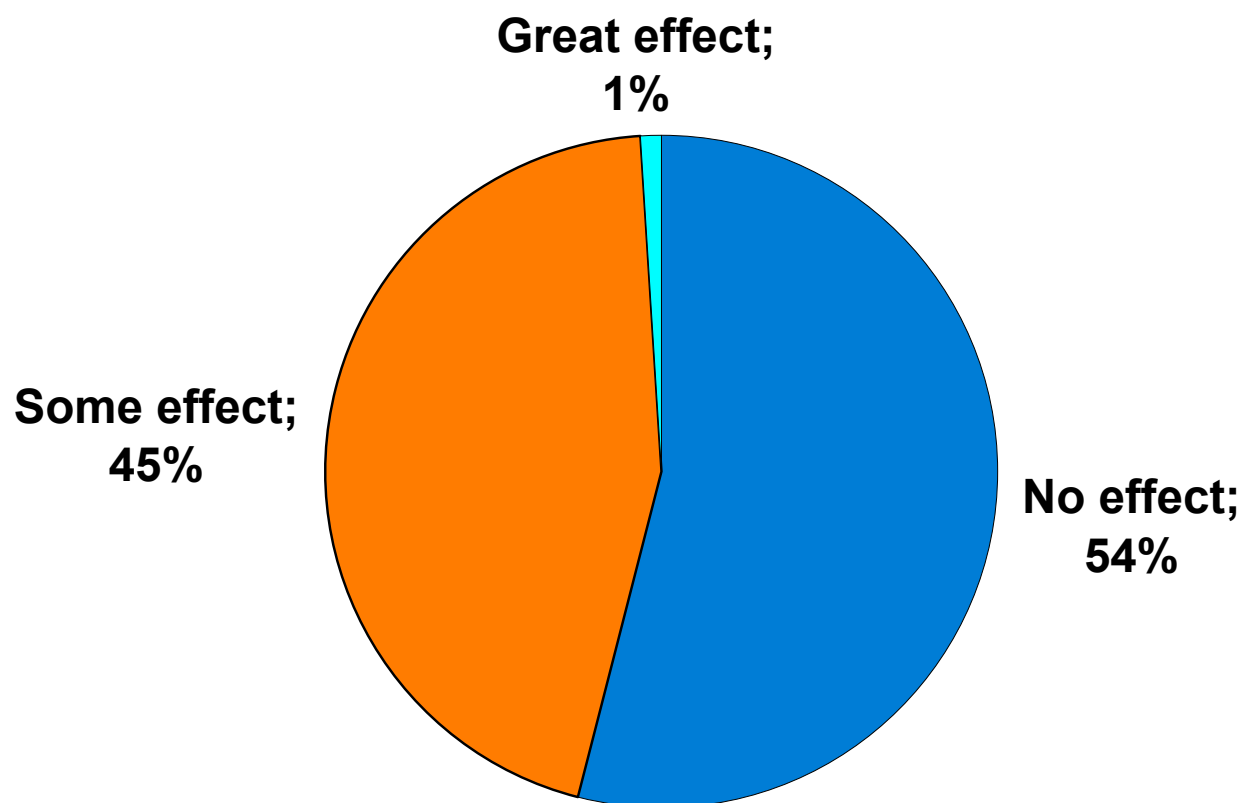
Awareness of U.S. military troops from Japan to Guam

Not aware
16%



Aware
84%

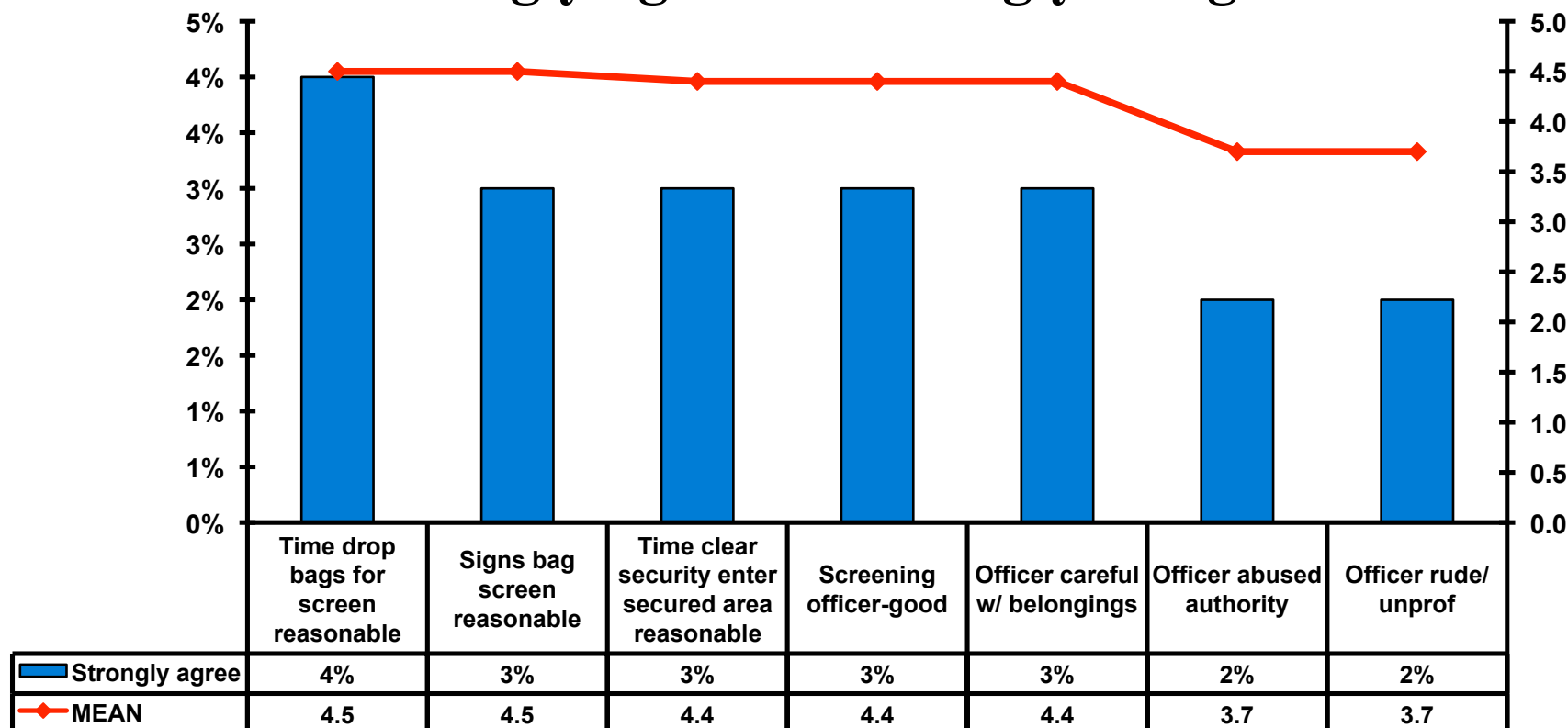
Effects of military troop movement on future trips to Guam



Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



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

