



GUAM VISITORS BUREAU

Hong Kong Visitor Tracker Exit Profile

3rd Qtr (April-June 2012)



Prepared by: QMark Research

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Background & Methodology

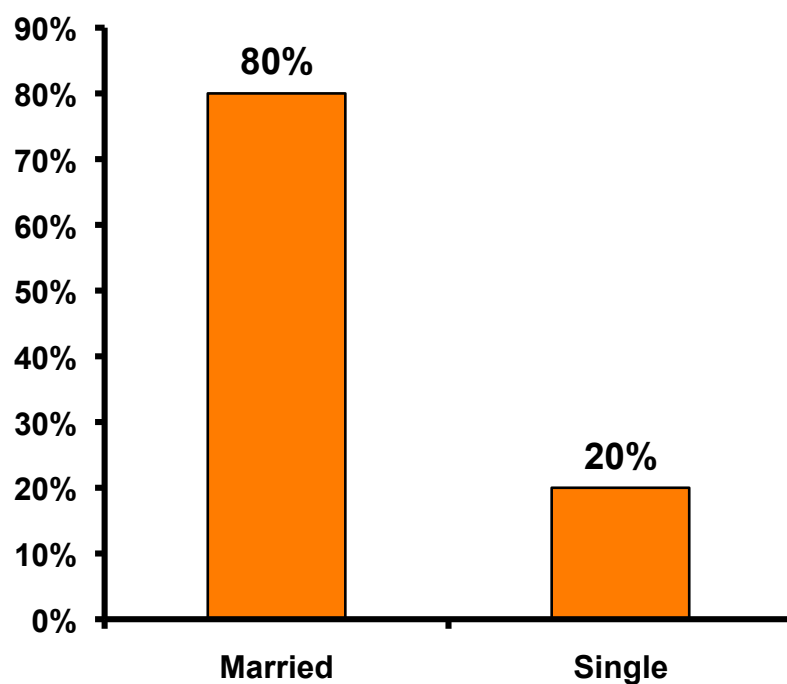
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Chinese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **152** departing Hong 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 **152** 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.

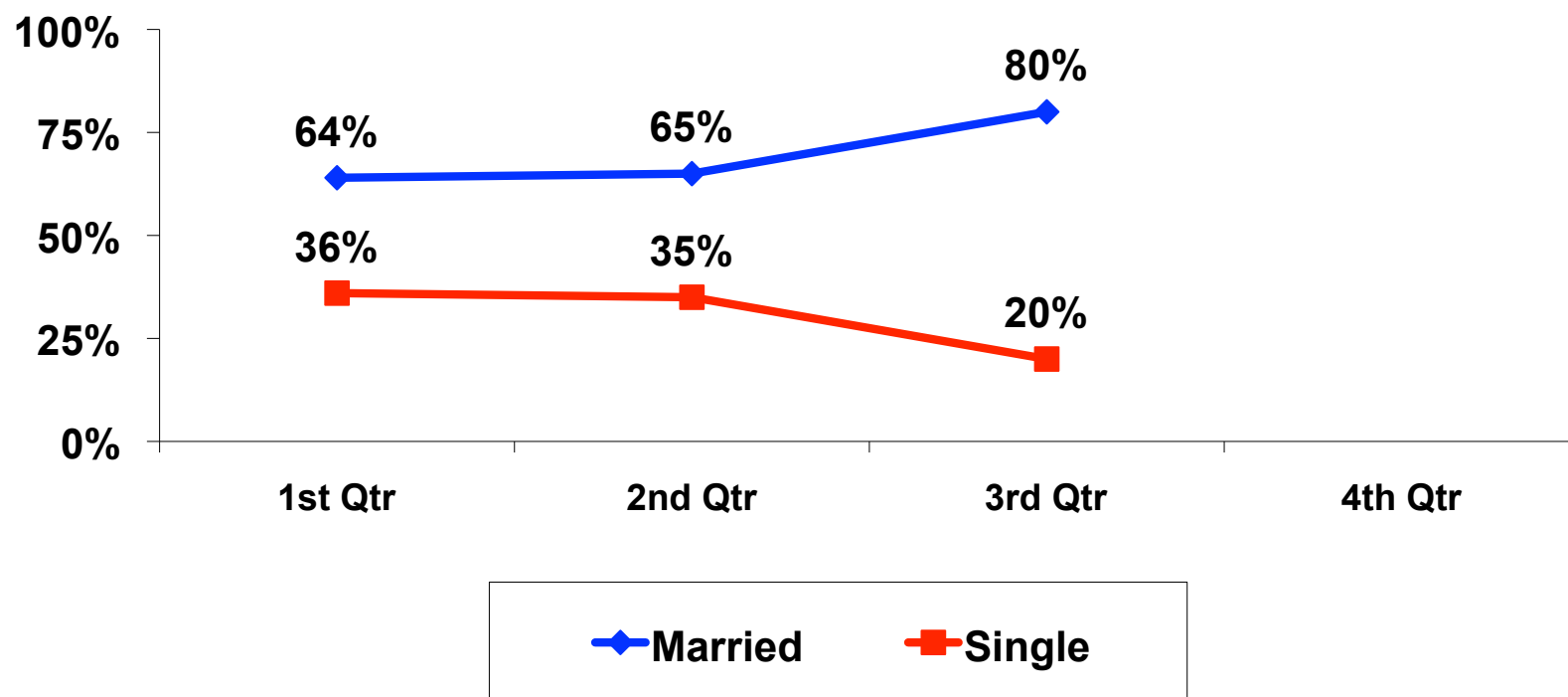
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

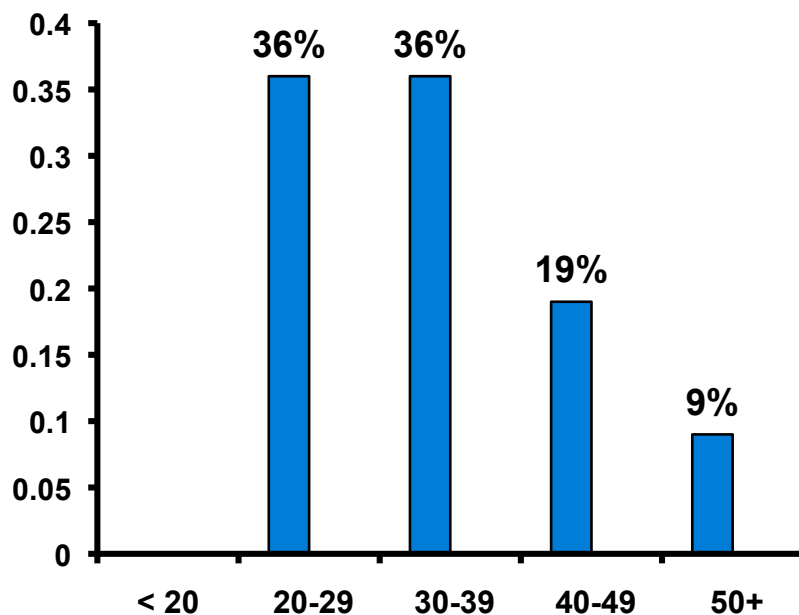


- A majority of visitors are married.

Marital Status

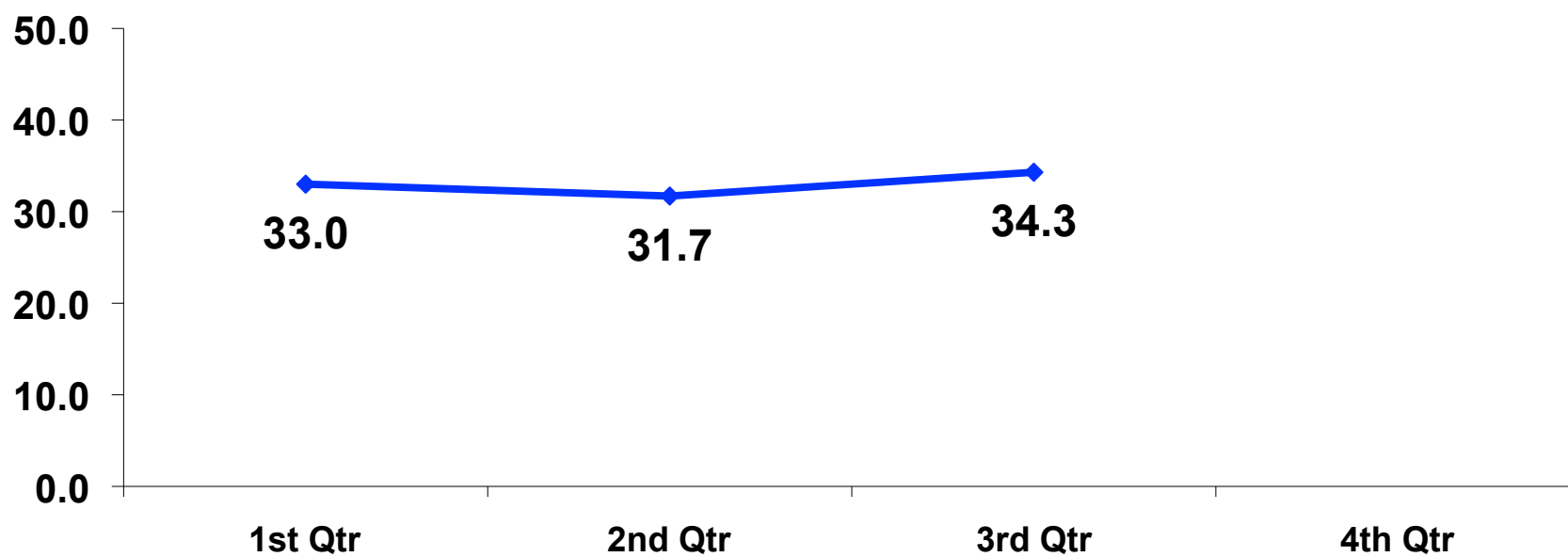


Age - Overall

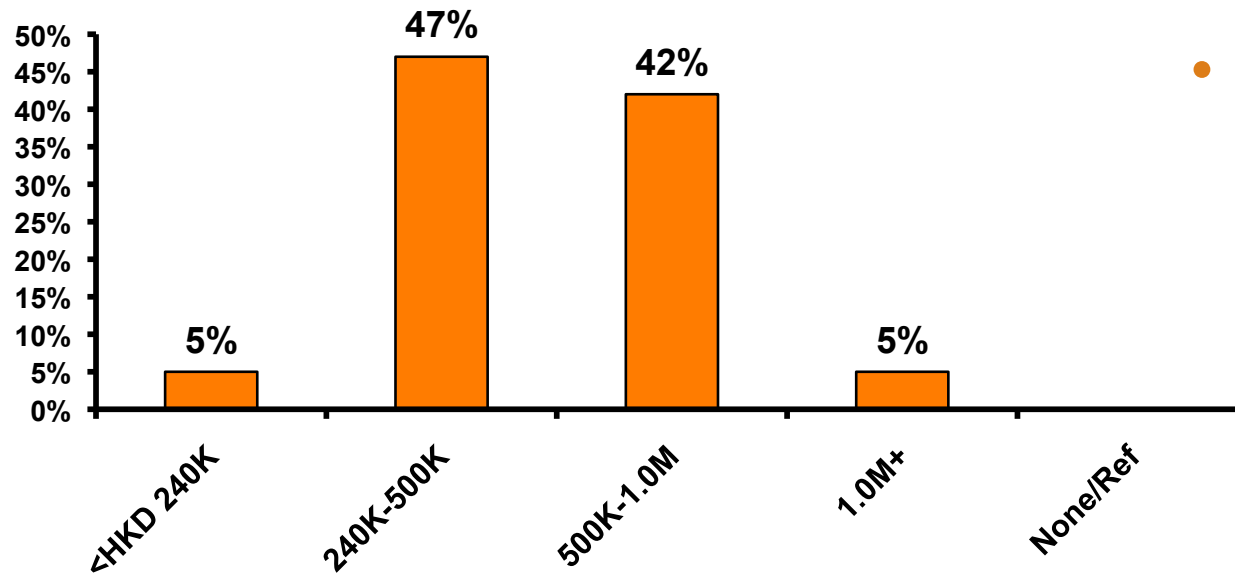


- The average age of the respondents is 34.3 years of age.

Average Age

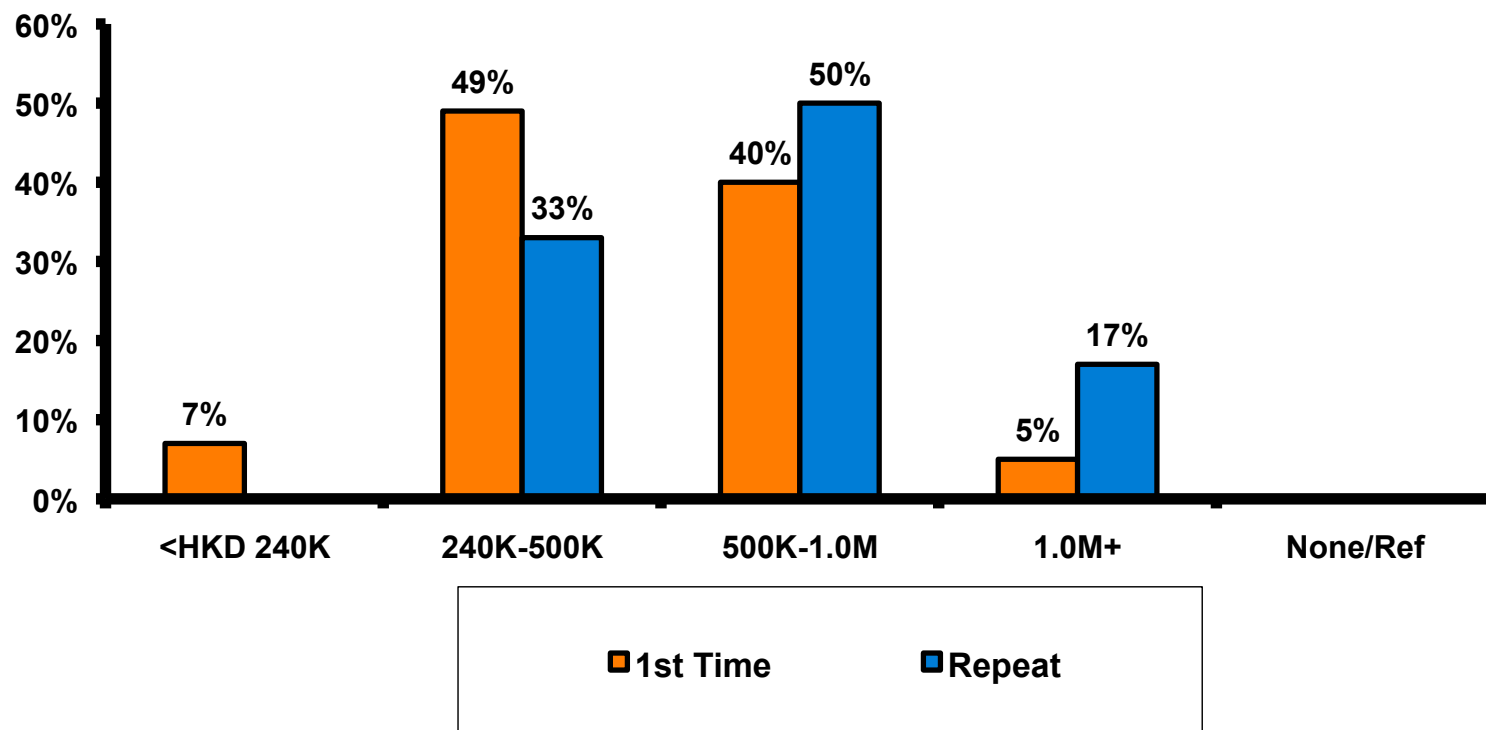


Personal Income



• HKD 7.76=\$1

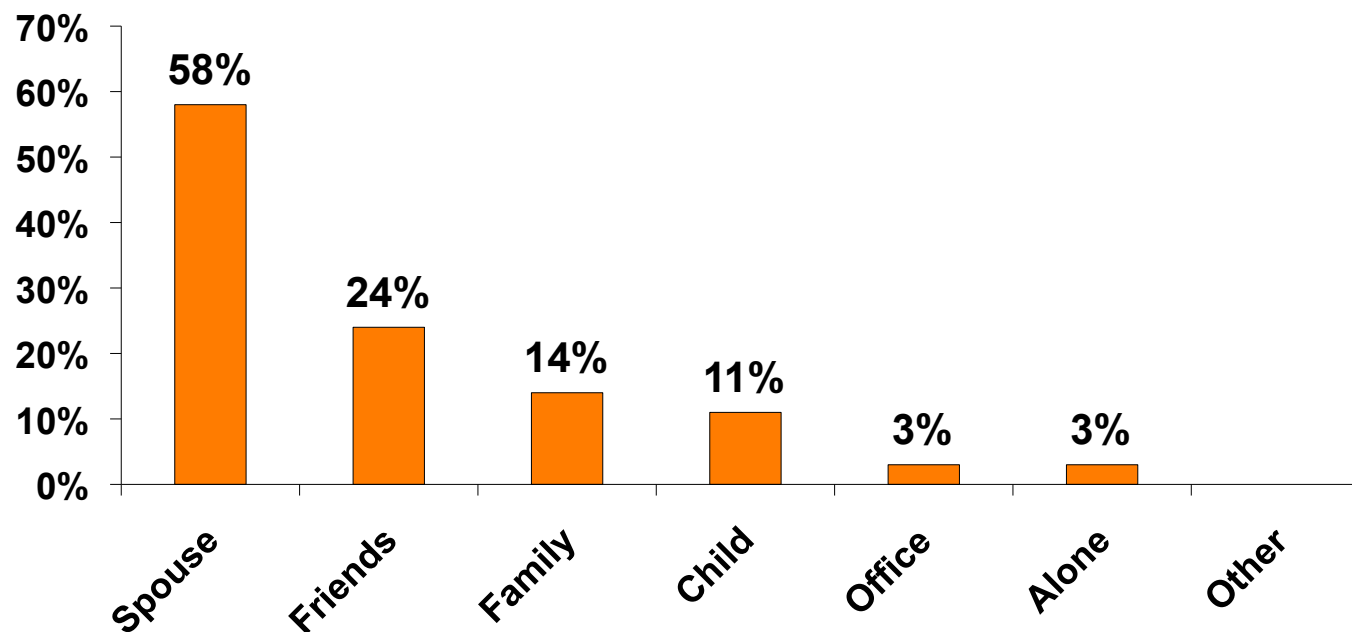
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
				Male	Female	20-29	30-39	40-49	50+
PERSONAL INCOME	<240K	Count	4	2	2	3	1		
			6%	5%	6%	11%	3%		
	240K-1.0M	Count	64	36	28	24	26	11	3
			89%	88%	90%	86%	90%	100%	75%
	1.0M-3.0M	Count	3	2	1	1	1		1
			4%	5%	3%	4%	3%		25%
	3.0M+	Count	1	1			1		
			1%	2%			3%		
Total	Count		72	41	31	28	29	11	4

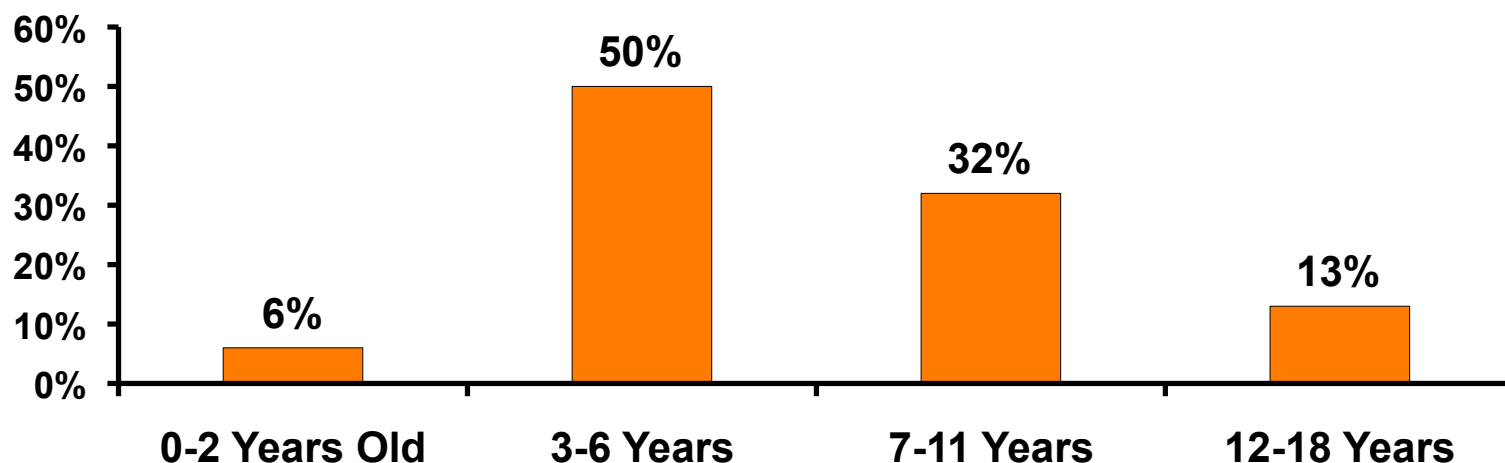
Travel Companions



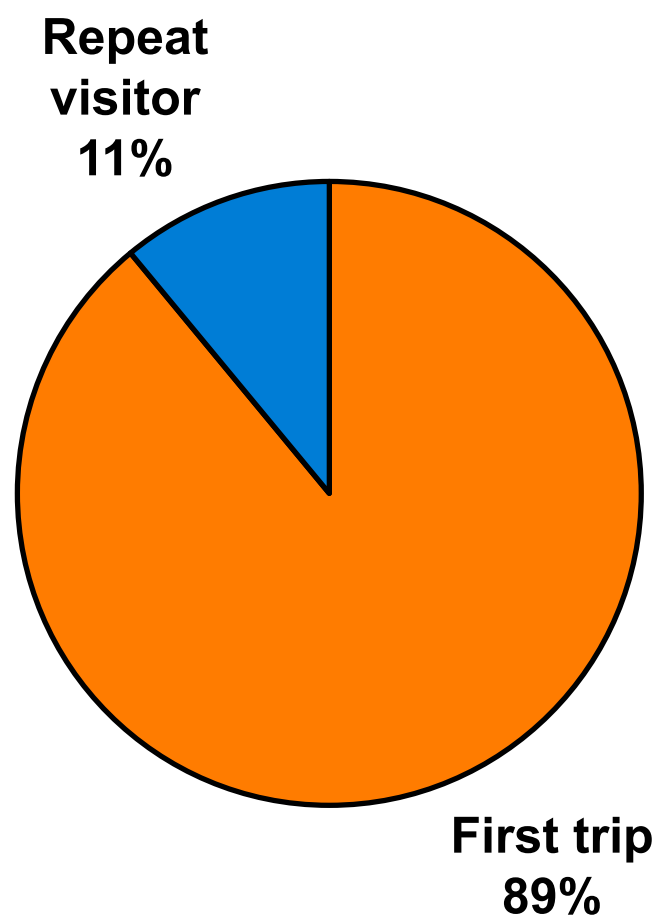
Number of Children Travel Party

N=16 total respondents traveling with children.

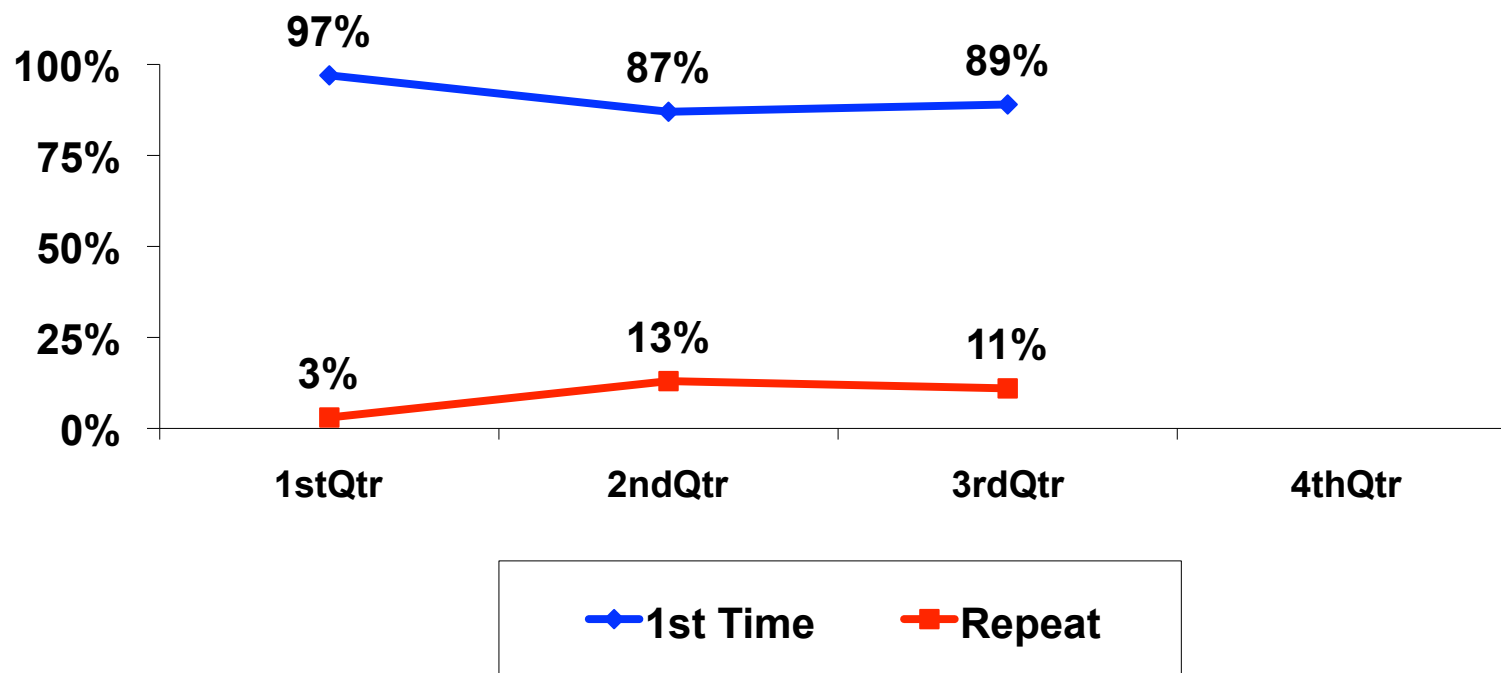
(Of those N=16 respondents, there is a total of 24 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



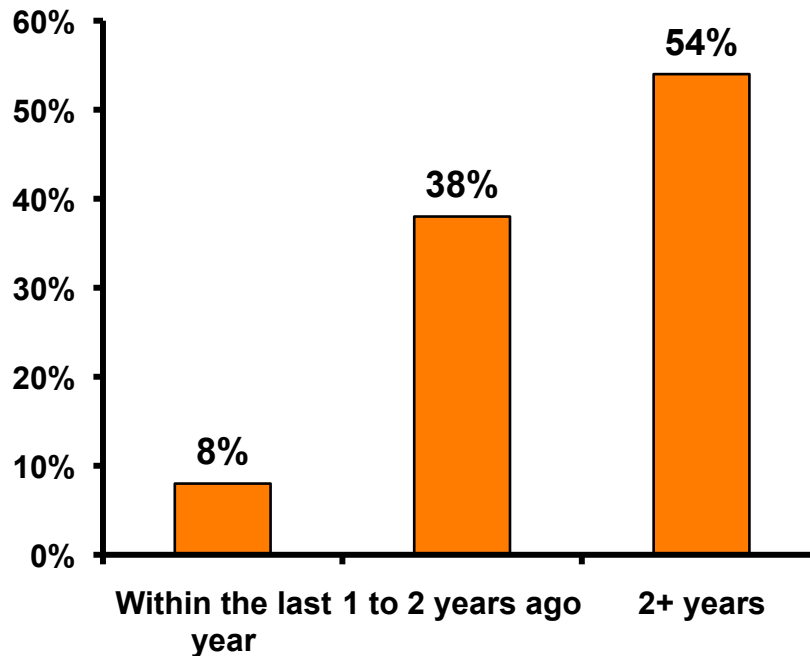
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	91	77	14
			60%	57%	82%
	Female	Count	61	57	3
			40%	43%	18%
Total	Count		152	134	17
AGE	20-29	Count	55	53	2
			36%	40%	12%
	30-39	Count	54	51	2
			36%	38%	12%
	40-49	Count	29	23	6
			19%	17%	35%
	50+	Count	13	6	7
			9%	5%	41%
Total	Count		151	133	17

- Repeat visitors tend to be older.

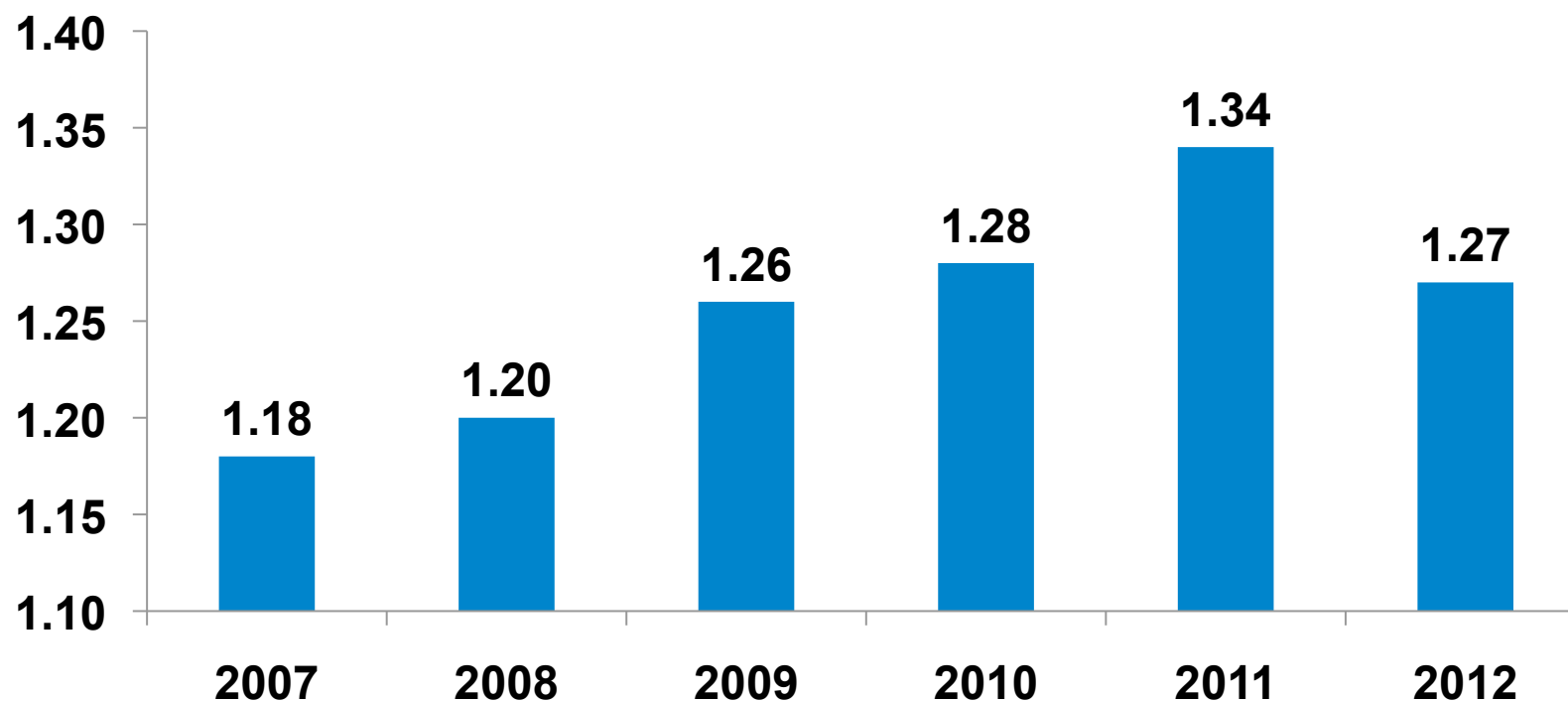
Repeat Visitors Last Trip

n = 13



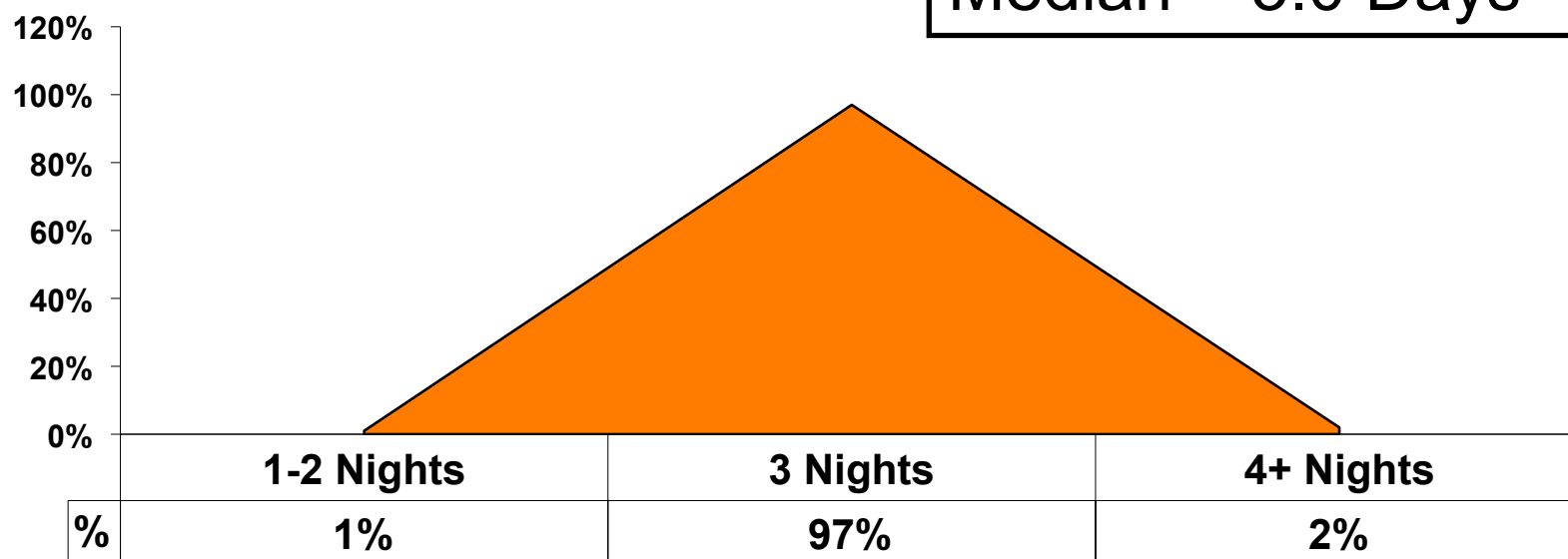
- The average repeat visitor has been to Guam 1.0 times.

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

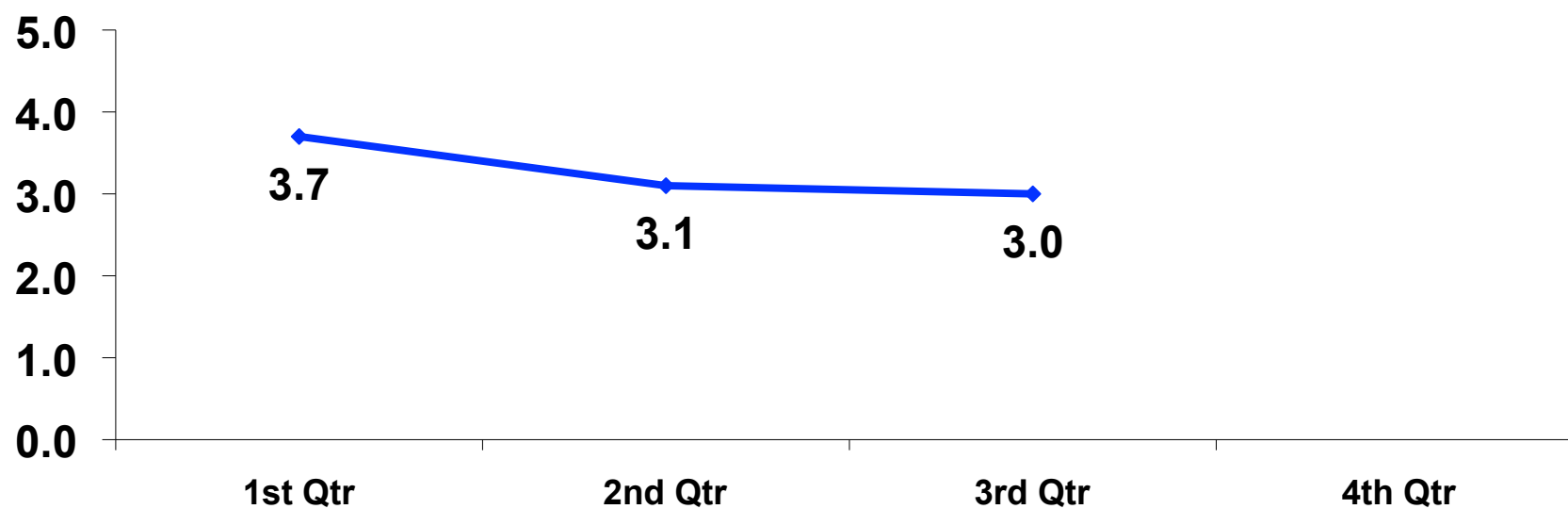


Length of Stay

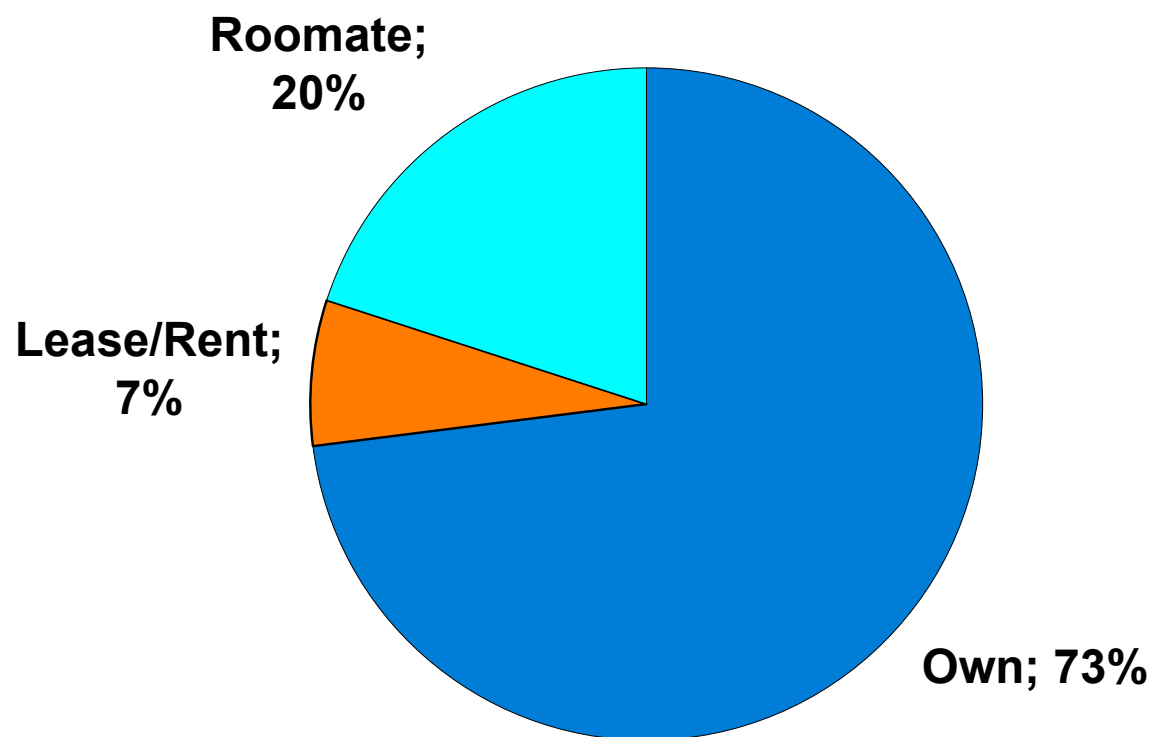
Mean = 3.00 Days
Median = 3.0 Days



Average Length of Stay



Living Accommodations

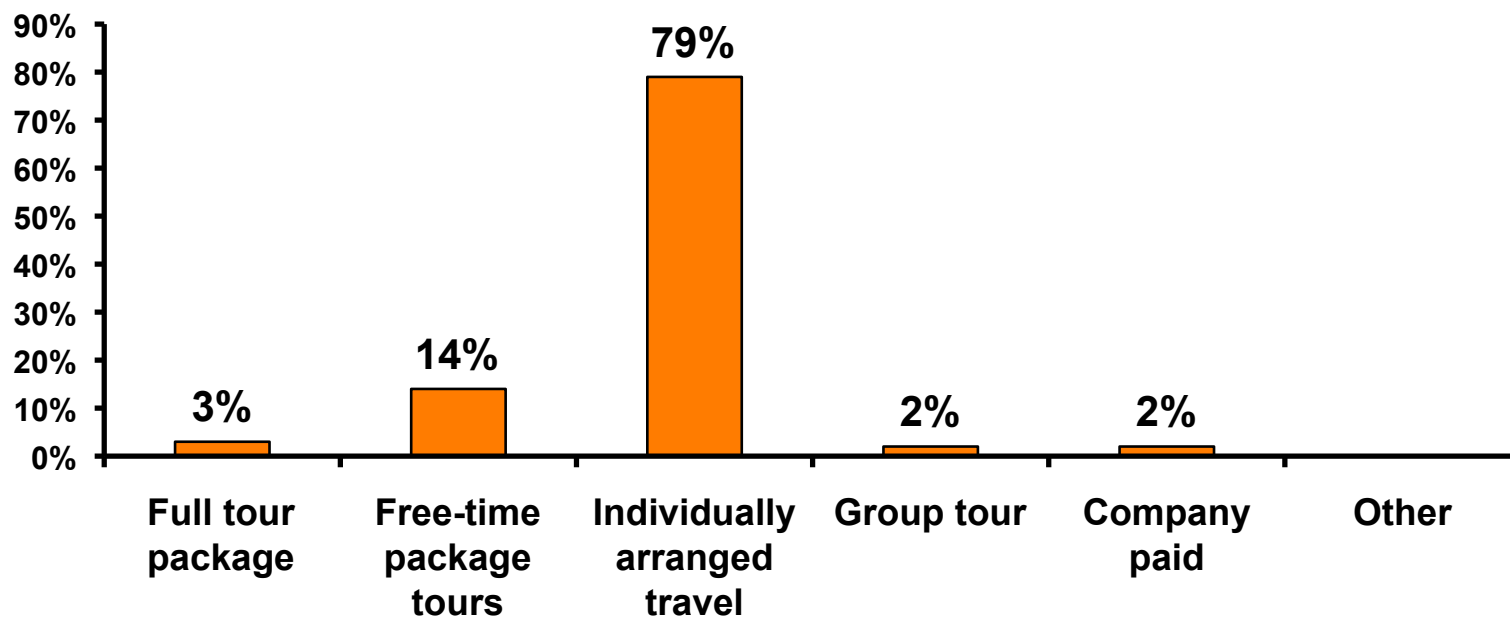


Occupation by Income

		TOTAL	PERSONAL INCOME			
			<240K	240K-1.0M	1.0M-3.0M	3.0M+
Q.33	Comp Emp-Office worker	37%		39%		
	Comp Emp- Salesperson	19%	25%	19%		
	Professional/ Specialist	16%		18%	67%	100%
	Govt-Manager/Exec	6%		9%	33%	
	Skilled worker	5%		5%		
	Govt-office worker	4%		5%		
	Free-lancer	4%		5%		
	Govt- Executive	3%	50%			
	Retired	3%				
	Student	2%	25%			
Total	Count	98	4	57	3	1.

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

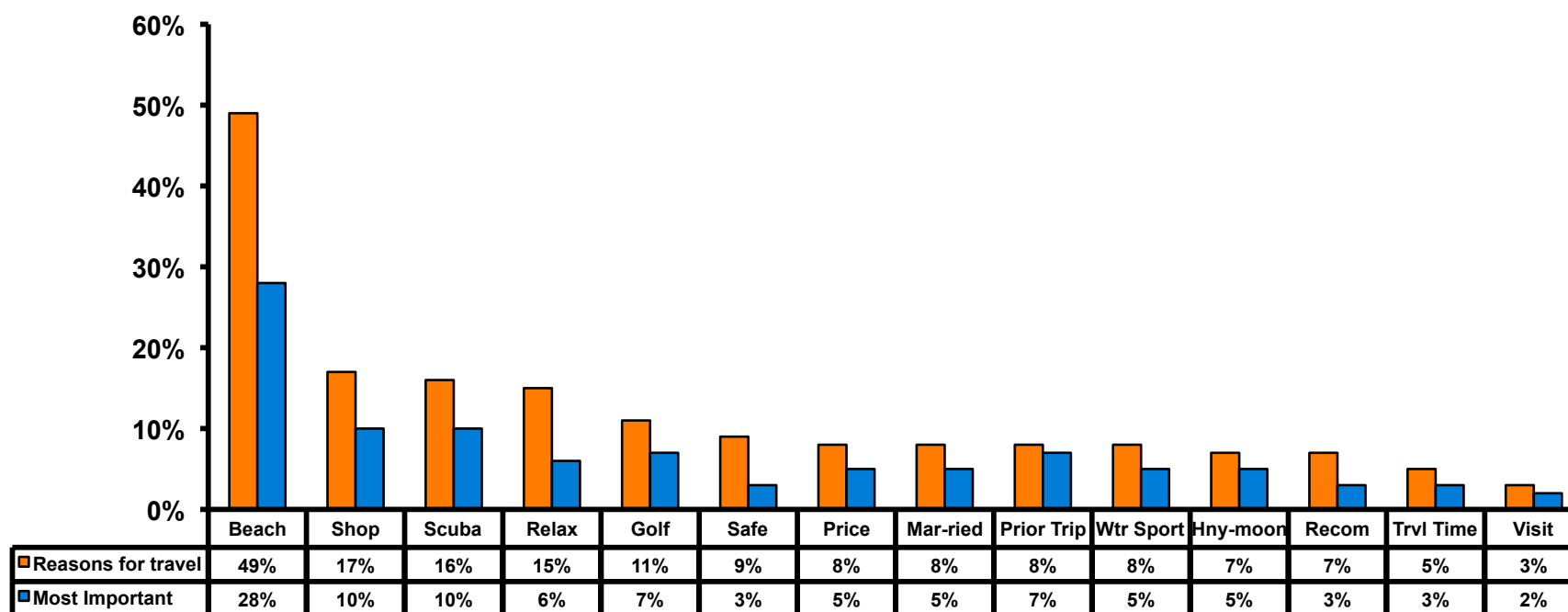


Accommodation by Income

Average length of stay: 3.00 days

		TOTAL	PERSONAL INCOME			
			<240K	240K-1.0M	1.0M-3.0M	3.0M+
Q.9	Hilton Guam Resort & Spa	33%	50%	41%		
	Pacific Islands Club PIC	16%	25%	13%	33%	
	Royal Orchid Guam	12%		14%		
	Hyatt Regency Guam	9%		8%		
	Fiesta Resort Guam	6%		5%		
	Holiday Resort Guam	3%		6%		
	The Westin Resort Guam	4%		3%		
	Guam Reef Hotel	3%	25%	2%		
	Outrigger Guam Resort	3%		2%		
	Hotel Nikko Guam	3%		2%		
	Sheraton Laguna Resort	3%			33%	
	Leo Palace Resort	2%		2%		
	Onward Beach Resort	1%			33%	
	Relatives, Friends, Home Stay	1%		2%		
	Guam Marriott Resort Hotel	1%				100%
	Hotel Sane Fe	1%		2%		
	Guam Plaza Hotel	1%				
Total	Count	147	4	63	3	1

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

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

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	49%	42%	56%	52%	38%	55%	39%
	Shopping	17%	9%	28%	14%	15%	21%	11%
	SCUBA diving	16%	20%	17%	10%	8%	16%	15%
	Just to relax	15%	13%	20%	10%	8%	12%	20%
	To golf	11%	11%	9%	10%	15%	5%	18%
	It is a safe place to spend a vacation	9%	5%	15%	10%		10%	8%
	A previous visit	8%	2%	2%	10%	54%	10%	5%
	Price of the tour package	8%	5%	9%	7%	15%	8%	8%
	To get married or Attend wedding	8%	5%	7%	10%	15%	12%	2%
	Water sports	8%	11%	4%	10%		11%	3%
	Recommendation of friend, relative, travel agency	7%	11%	4%	7%	8%	9%	5%
	Honeymoon	7%	11%	9%			9%	5%
	Short travel time	5%	11%	4%			7%	3%
	To visit friends or relatives	3%	2%		3%	15%	3%	2%
	Pleasure	2%	2%		7%		2%	2%
	Promotional materials from GVB	1%			7%		1%	2%
Total	Cases	152	55	54	29	13	91	61

Motivation by Income

		TOTAL	PERSONAL INCOME			
			<240K	240K-1.0M	1.0M-3.0M	3.0M+
Q.5	Beautiful seas, beaches, tropical climate	49%	25%	52%	100%	100%
	Shopping	17%		22%		
	Just to relax	15%	75%	17%		
	SCUBA diving	16%	25%	14%		
	To golf	11%		16%		
	It is a safe place to spend a vacation	9%		6%	33%	100%
	Price of the tour package	8%		6%	33%	
	Recommendation of friend, relative, travel agency	7%	25%	6%	33%	
	Honeymoon	7%	25%	6%	33%	
	A previous visit	8%		5%	33%	
	Water sports	8%		5%	33%	
	To get married or Attend wedding	8%		5%		100%
	Short travel time	5%		3%	33%	100%
	To visit friends or relatives	3%		2%		
	Pleasure	2%	25%	2%		
	Promotional materials from GVB	1%				
Total	Cases	152	4	64	3	1

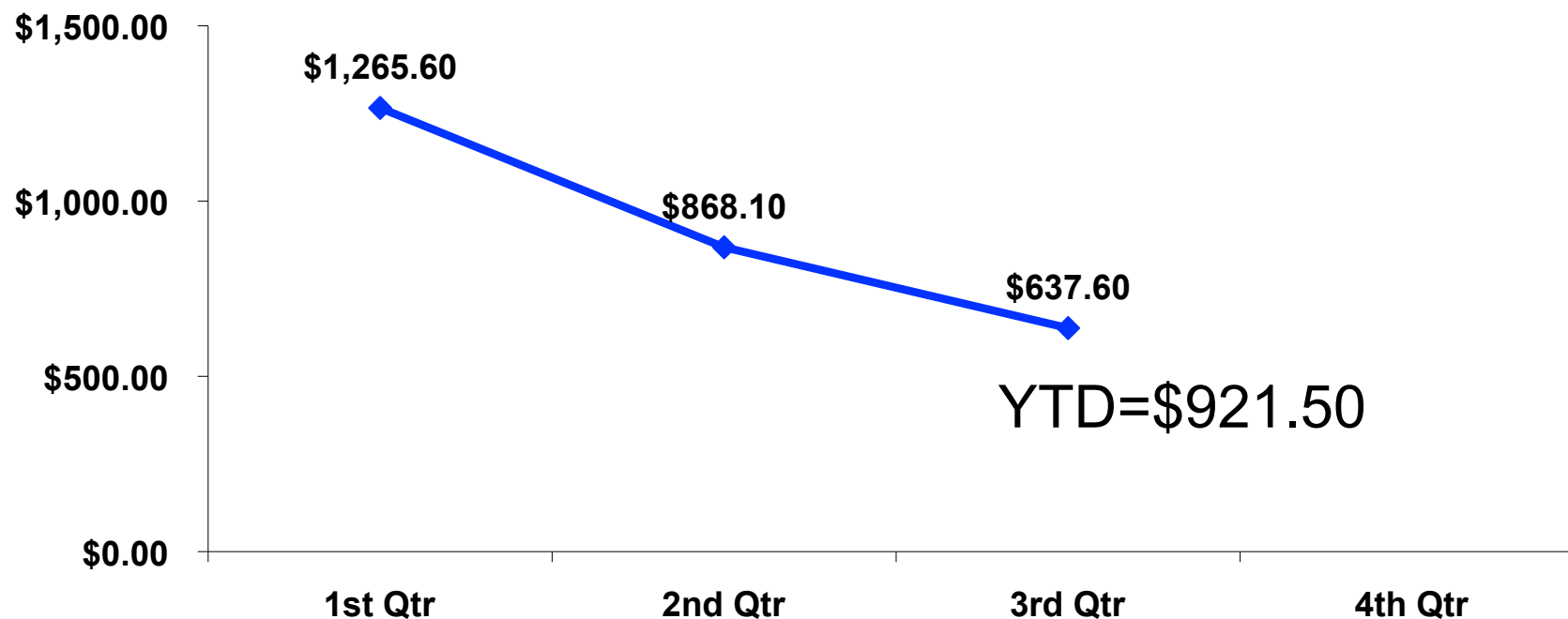
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

HKD 7.76/US\$1

- \$1,119.90 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$7,216 = maximum (highest amount recorded for the entire sample)
- \$637.60 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

HKD 7.76=\$1

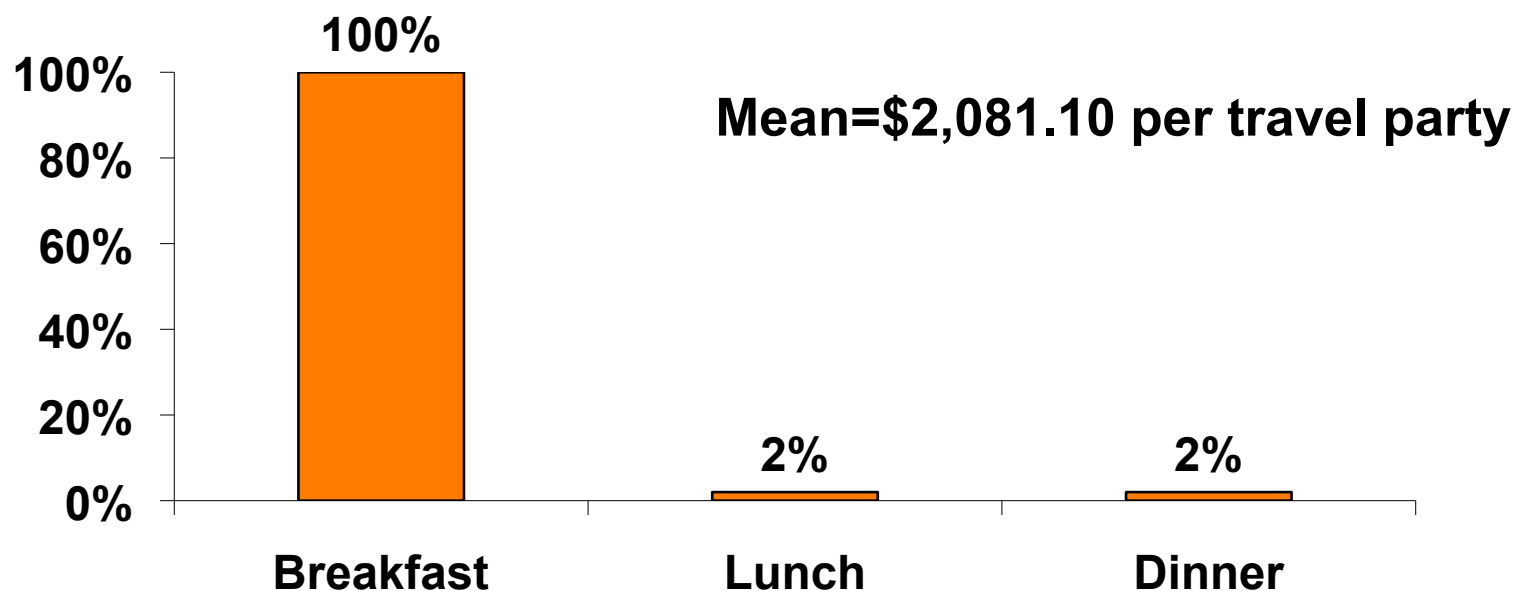
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$1,341.40
Air & Accommodation w/ daily meal package	\$2,081.10
Air only	\$1,569.10
Accommodation only	\$4,696.90
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$67.70
Ground transportation- Hong Kong	\$279.30
Ground transportation- Guam	\$218.10
Optional tours/ activities	\$1,018.50
Other expenses	\$852.20
Total Prepaid	\$1,119.90

Prepaid Meal Breakdown

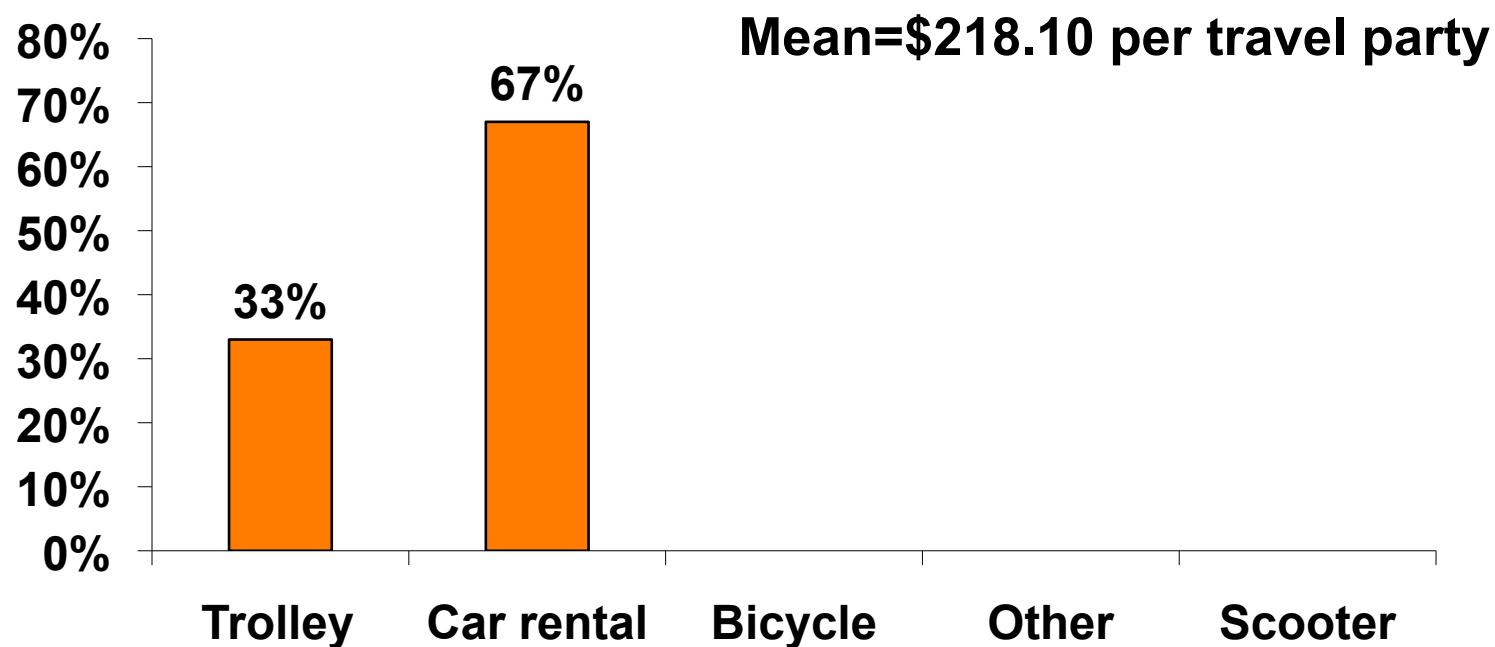
Air/ Accommodations with Daily Meal Package

n=42



Prepaid Ground Transportation

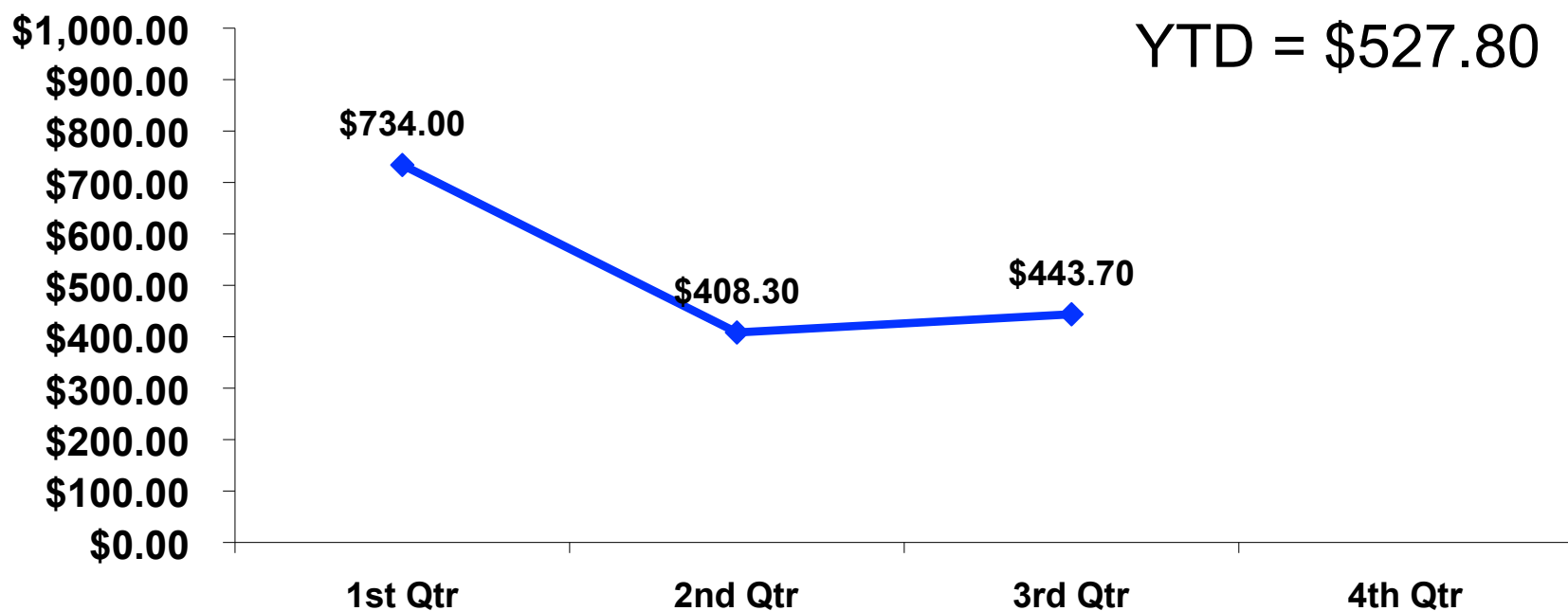
n=3



On-Island Expenditures

- \$764.00 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,390 = Maximum (highest amount recorded for the entire sample)
- \$443.70 = overall mean average per person on-island expenditure

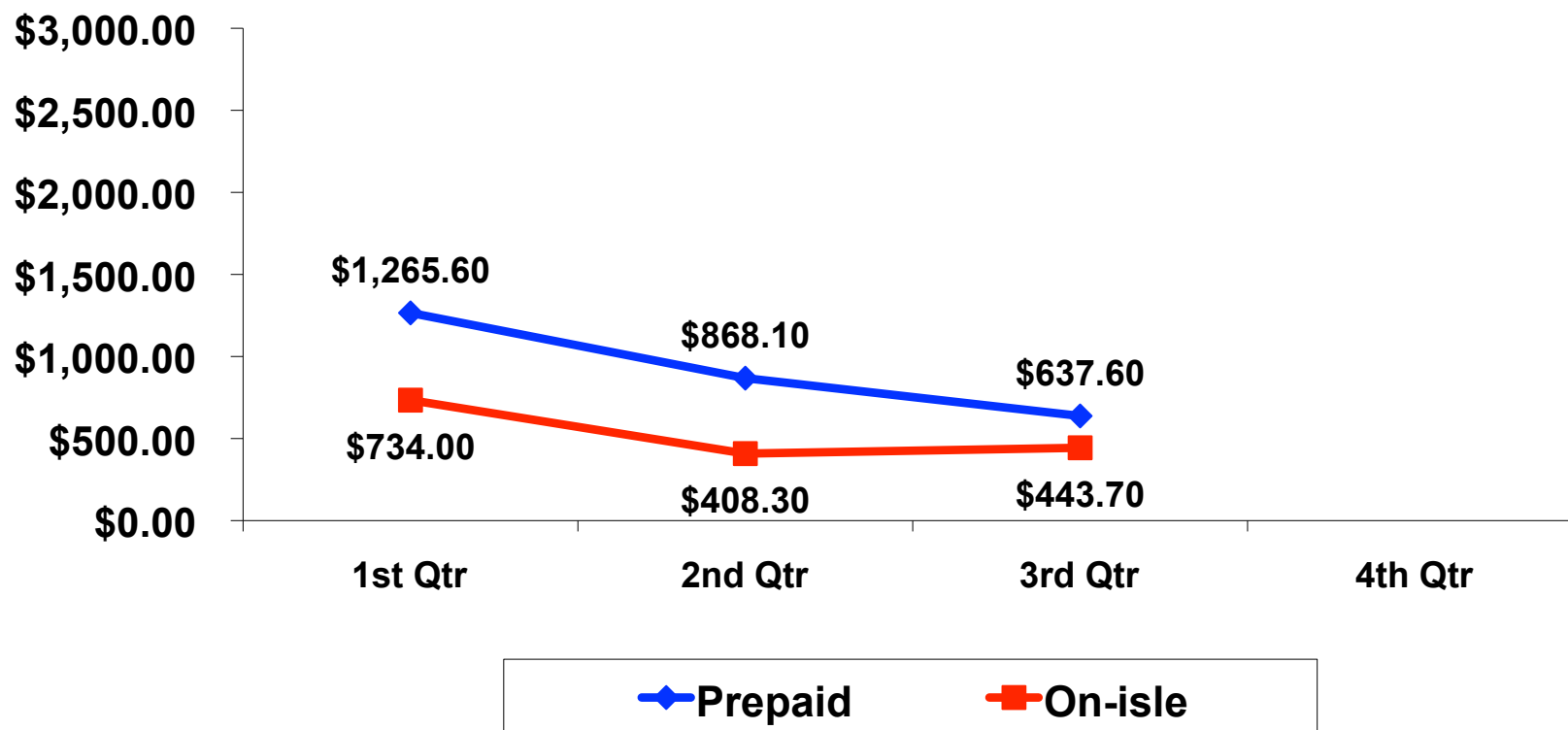
On-Island Expenditures Per Person



Prepaid/On-Island Expenditures Per Person

On-Island YTD = \$527.80

Prepaid YTD=\$921.50



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
					AGE				AGE			
					20-29	30-39	40-49	50+	20-29	30-39	40-49	50+
Q.11A	Mean	\$764.03	\$831.93	\$662.72	\$737.53	\$1,029.70	\$735.56	\$651.11	\$671.20	\$839.57	\$448.64	\$270.00
	Median	\$600	\$670	\$520	\$588	\$750	\$700	\$600	\$500	\$780	\$0	\$100

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
			Male	Female	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$69.52	\$69.94	\$68.91	\$70.91	\$64.50	\$61.07	\$107.69
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$9.04	\$7.96	\$10.61	\$13.33	\$7.59	\$6.79	\$2.31
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$17.84	\$21.33	\$12.75	\$17.78	\$25.99	\$11.43	\$00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$106.85	\$113.88	\$96.60	\$115.73	\$97.78	\$103.93	\$120.77
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$134.79	\$155.88	\$104.02	\$98.91	\$200.09	\$110.46	\$75.33
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$43.95	\$49.24	\$36.23	\$42.95	\$49.25	\$43.21	\$31.54
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$13.78	\$20.30	\$4.26	\$4.91	\$25.09	\$13.11	\$00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$389.66	\$426.07	\$335.66	\$365.64	\$513.93	\$299.11	\$196.15
	Median	\$0	\$60	\$0	\$0	\$175	\$0	\$0
TOTAL ON ISLAND	Mean	\$764.03	\$831.93	\$662.72	\$707.38	\$955.76	\$626.72	\$533.85
	Median	\$600	\$670	\$520	\$500	\$778	\$520	\$500

On-Island Expenditures

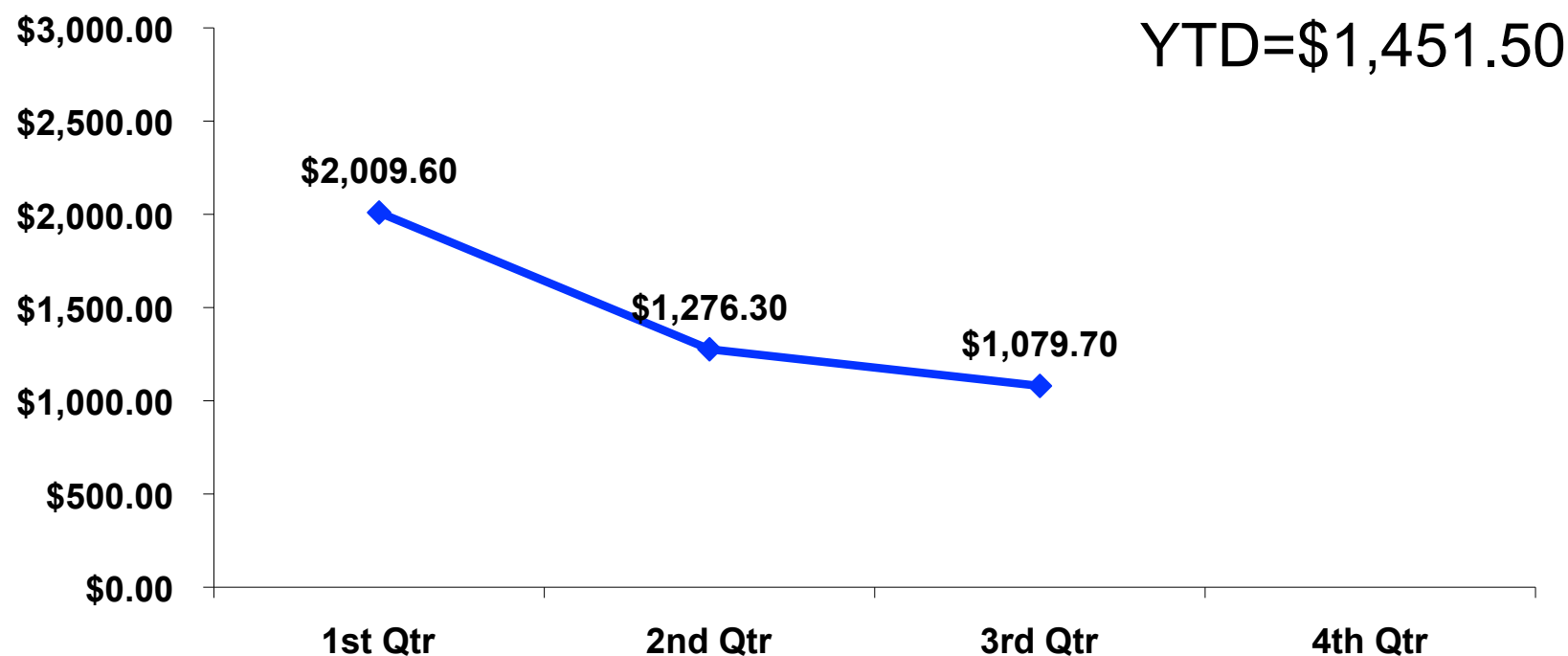
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$62.14	\$120.59
	Median	\$0	\$170
F&B-FF	Mean	\$9.28	\$7.65
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$18.38	\$11.76
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$100.66	\$149.41
TOUR	Median	\$0	\$200
GIFT/	Mean	\$138.47	\$108.24
SOUV-SELF	Median	\$0	\$100
GIFT/ SOUV-	Mean	\$41.15	\$62.35
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$15.17	\$3.82
	Median	\$0	\$0
OTHER EXP	Mean	\$390.57	\$396.76
	Median	\$0	\$100
TOTAL ON	Mean	\$751.69	\$860.59
ISLAND	Median	\$565	\$870

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,079.70 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,362 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

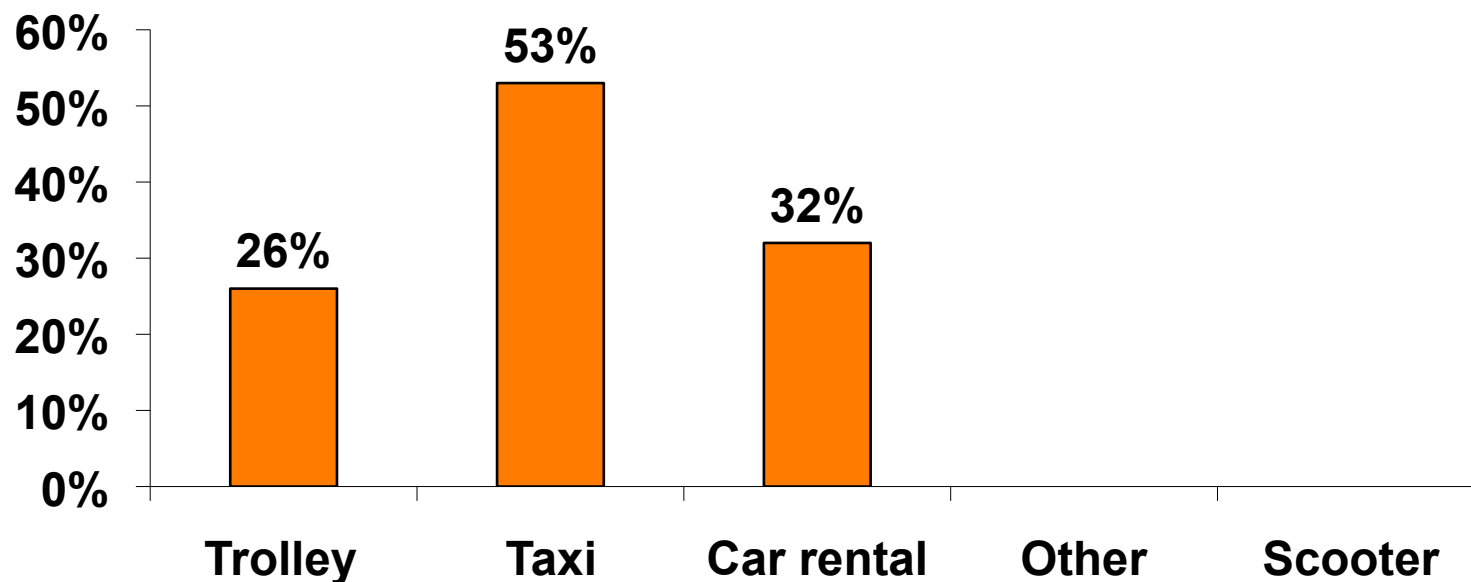


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$69.50
Food & beverage in fast food restaurant/ convenience store	\$9.00
Food & beverage at restaurants or drinking establishments outside a hotel	\$17.80
Optional tours and activities	\$106.90
Gifts/ souvenirs for yourself/companions	\$134.80
Gifts/ souvenirs for friends/family at home	\$43.90
Local transportation	\$13.80
Other expenses not covered	\$389.70
Average Total	\$764.00

Local Transportation

n=19



Mean=\$13.80 per travel party

Guam Airport Expenditures

- \$19.80 = 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

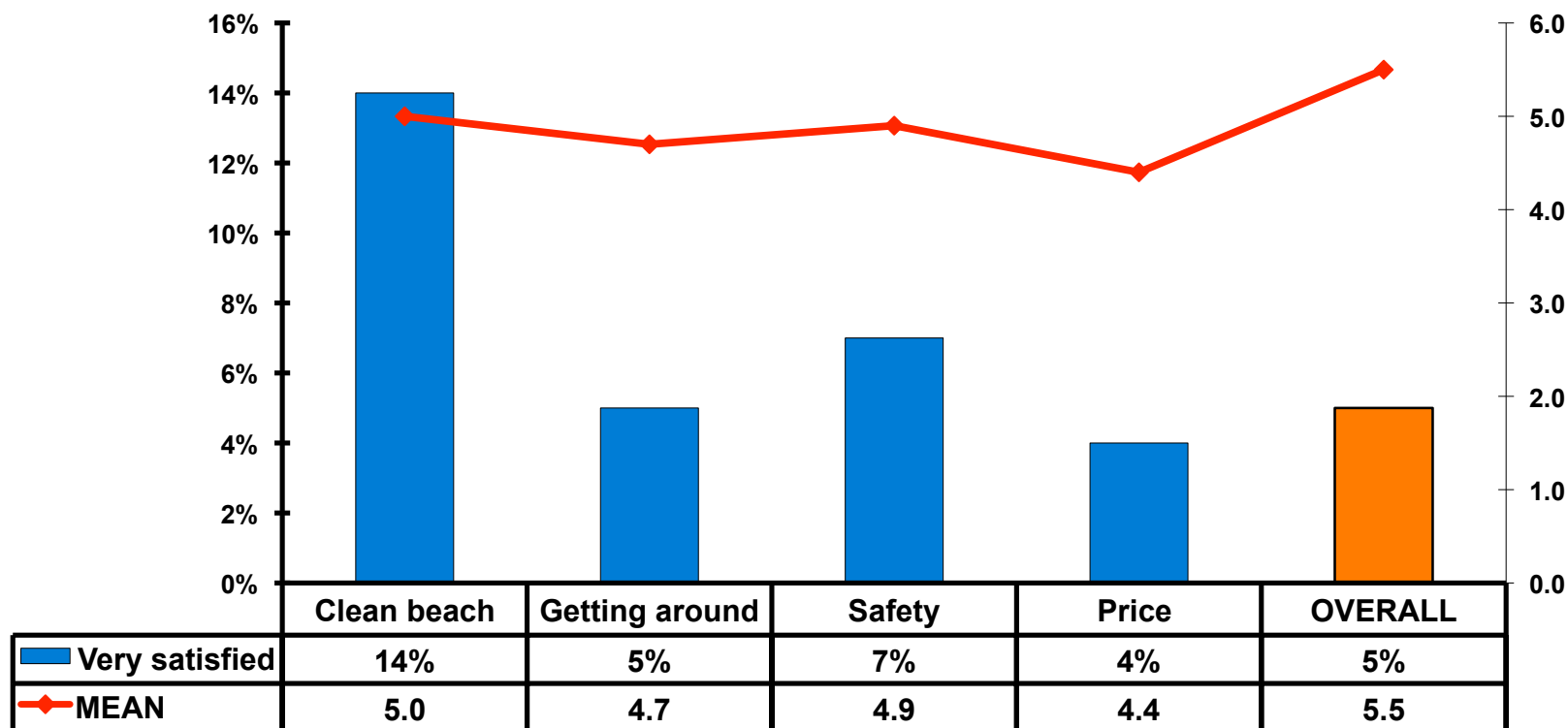
	MEAN \$
Food & Beverages	\$1.60
Gifts/Souvenirs Self	\$10.50
Gifts/Souvenirs Others	\$7.50
Total	\$19.80

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

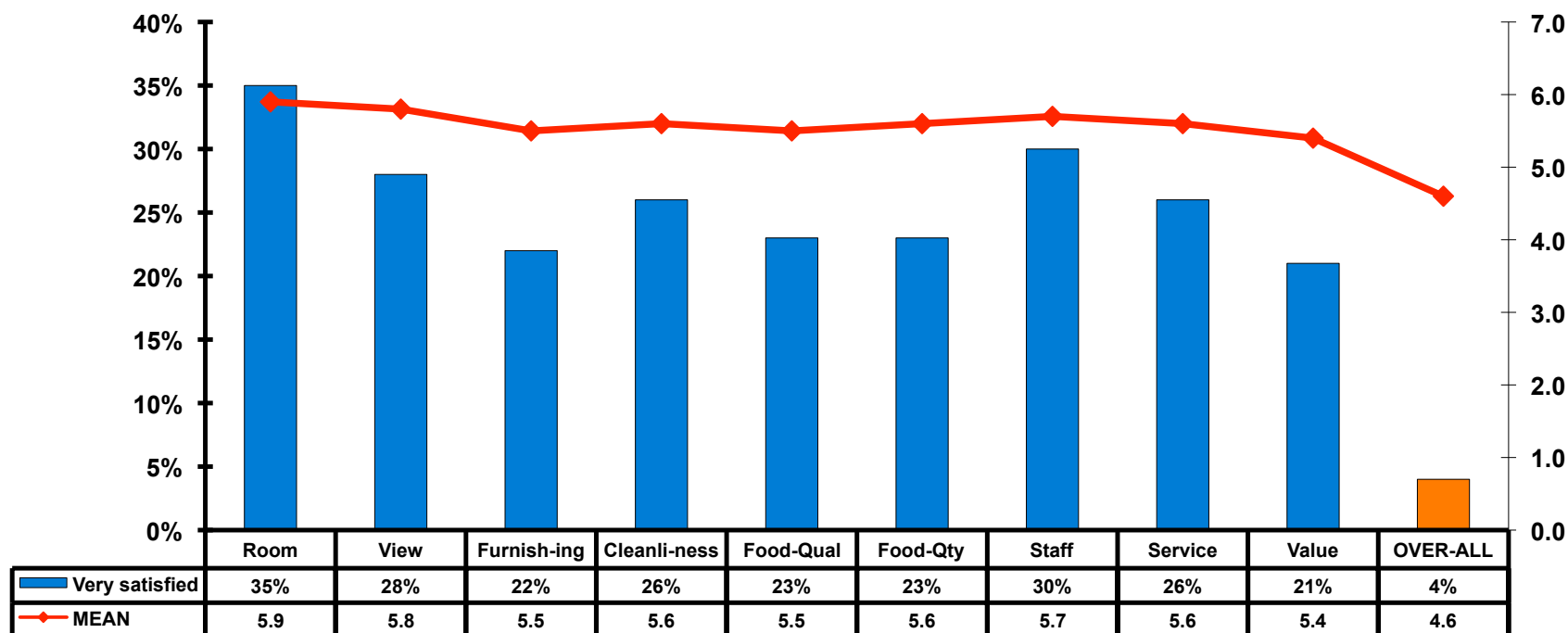
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

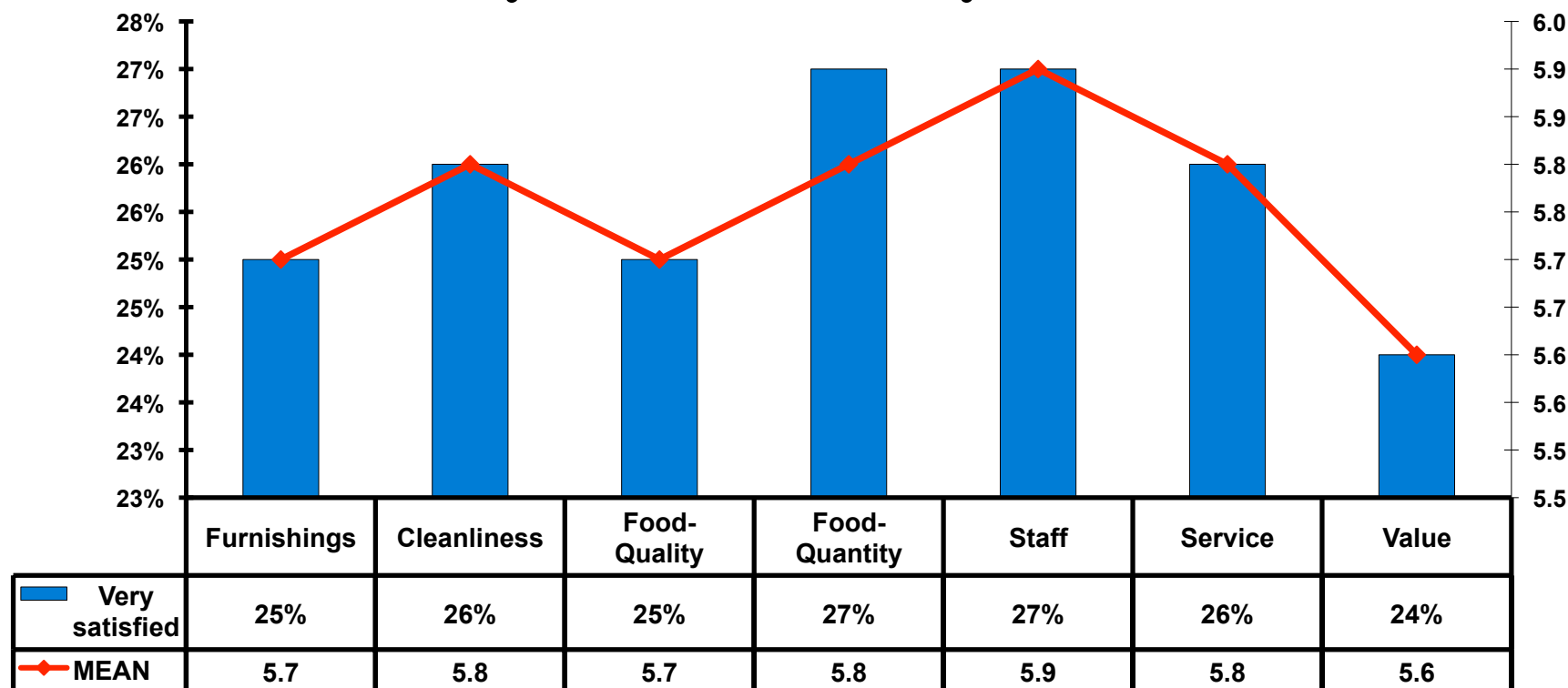
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

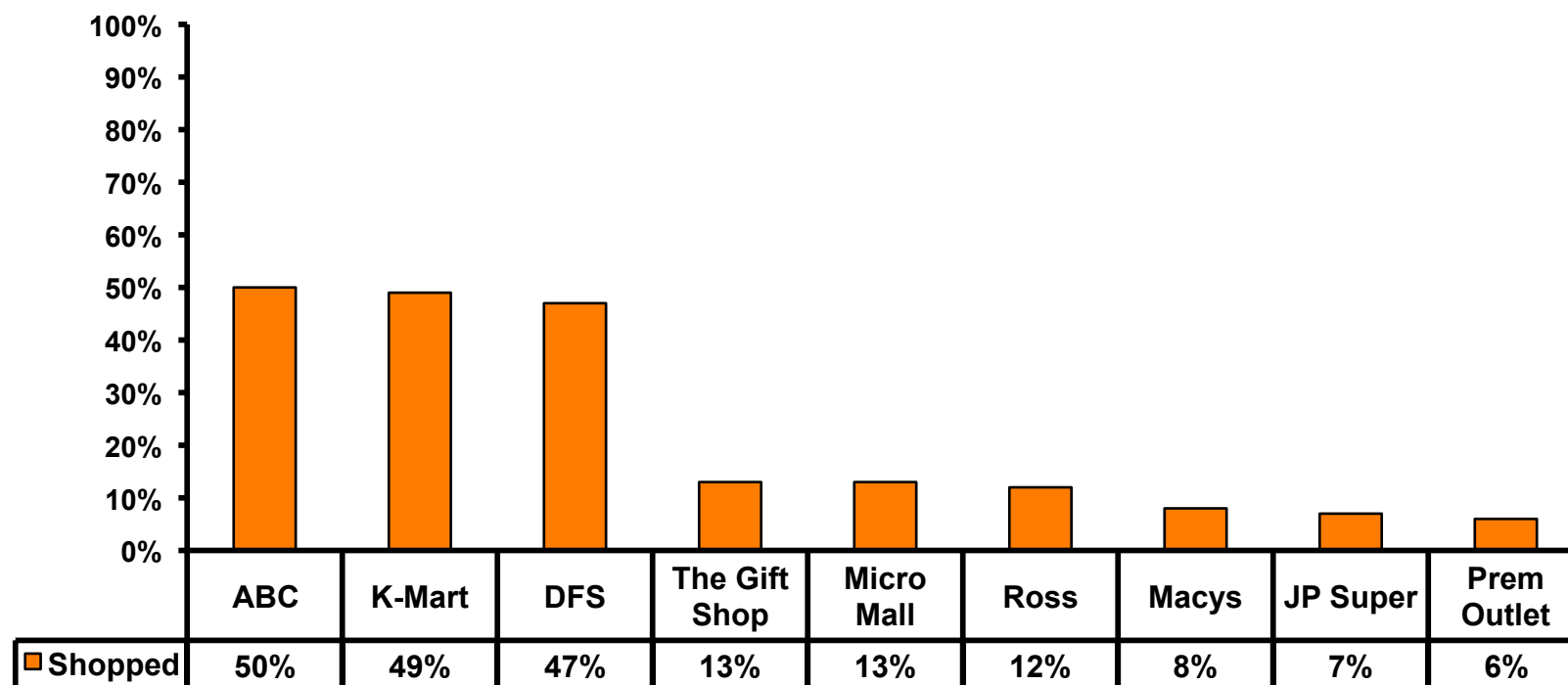
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

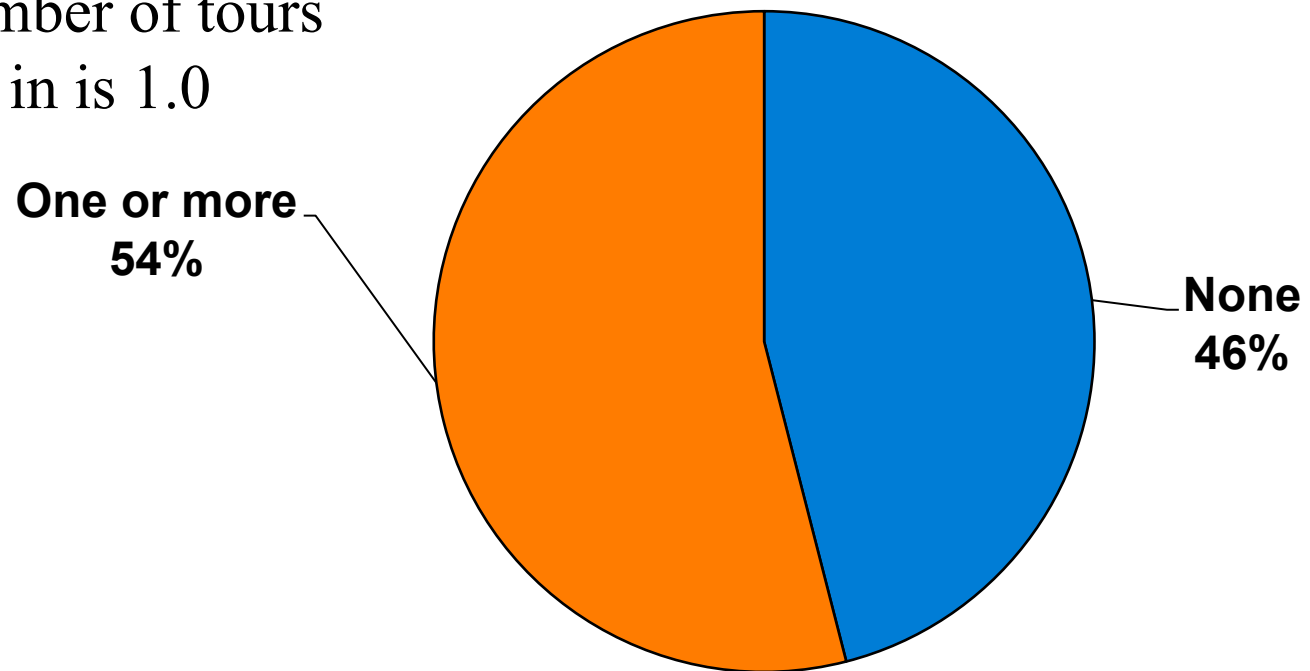
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 18%	Score of 6 to 7 = 18%
Score of 4 to 5 = 78%	Score of 4 to 5 = 78%
Score 1 to 3 = 5%	Score 1 to 3 = 5%
MEAN = 4.6	MEAN = 4.5

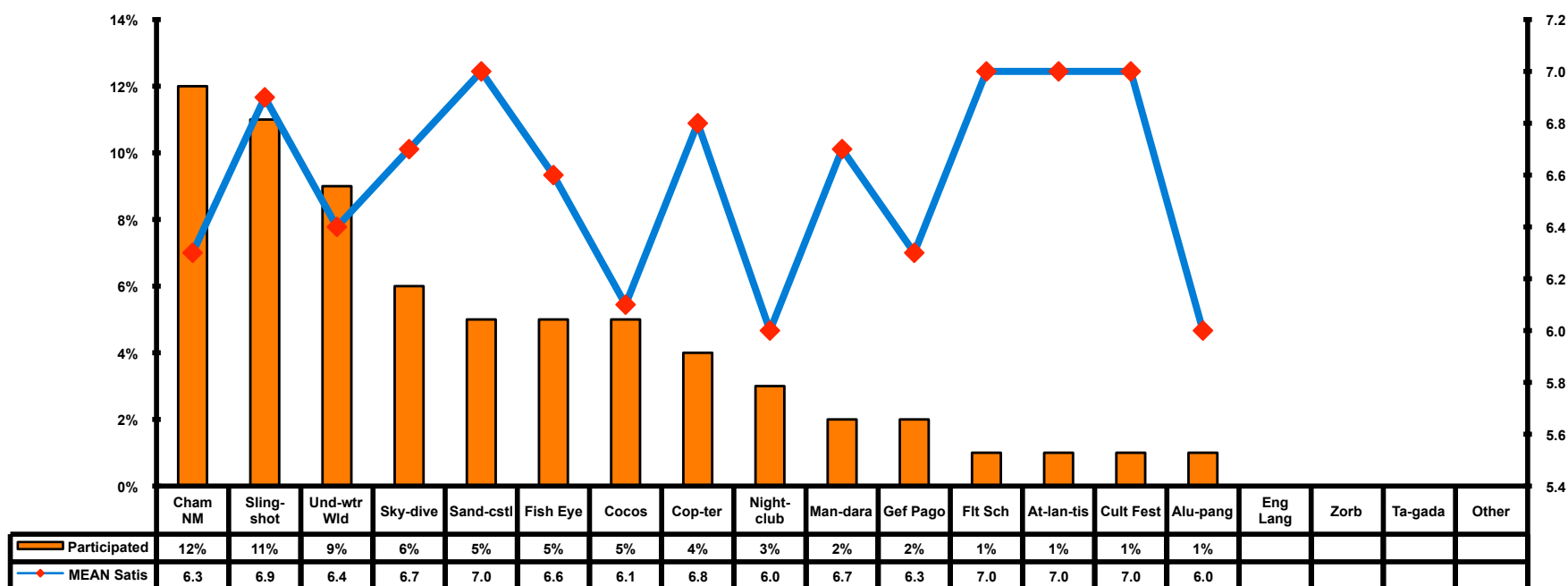
Optional Tour Participation

- Average number of tours participated in is 1.0



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 = 26%	Score of 6 to 7 = 24%
Score of 4 to 5 = 74%	Score of 4 to 5 = 75%
Score 1 to 3 = -%	Score 1 to 3 = 2%
MEAN = 4.8	MEAN = 4.7

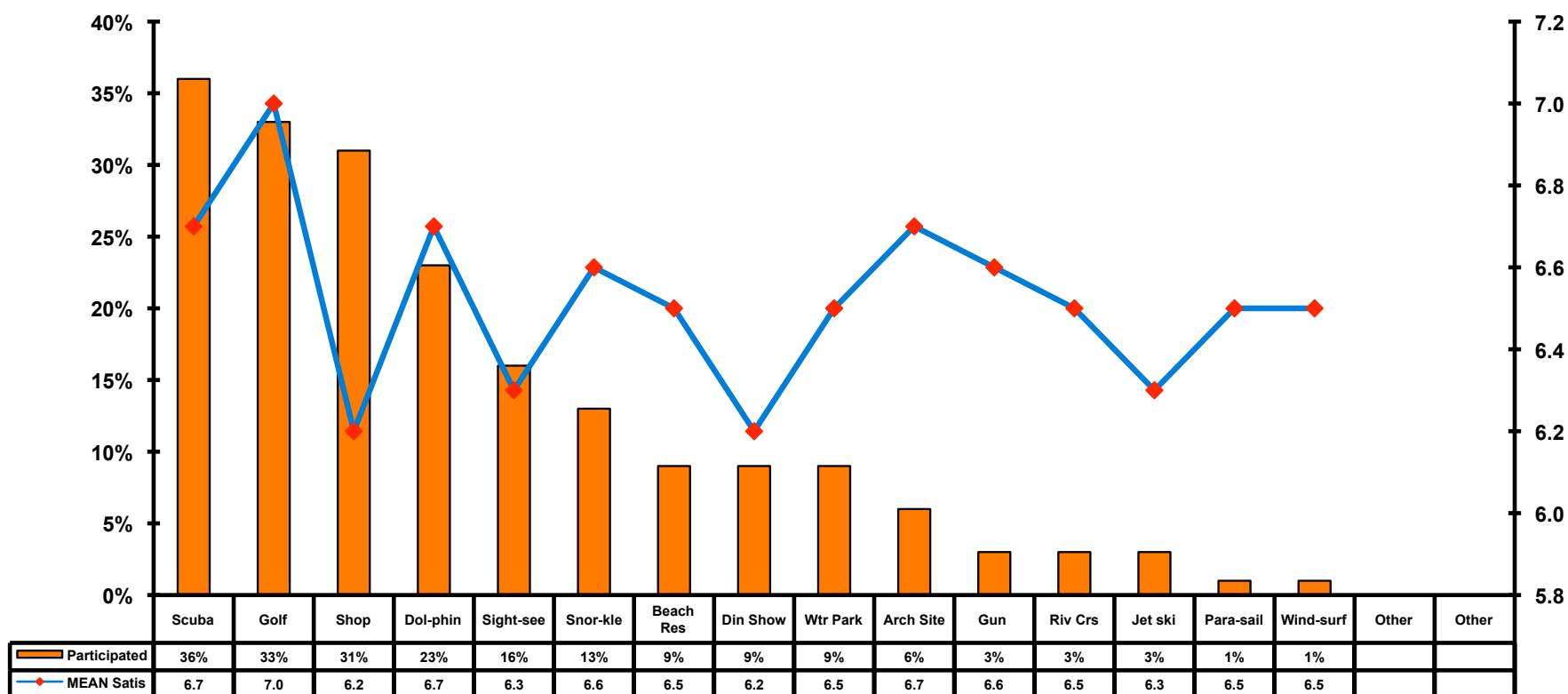
Night Tours Satisfaction

7pt Rating Scale

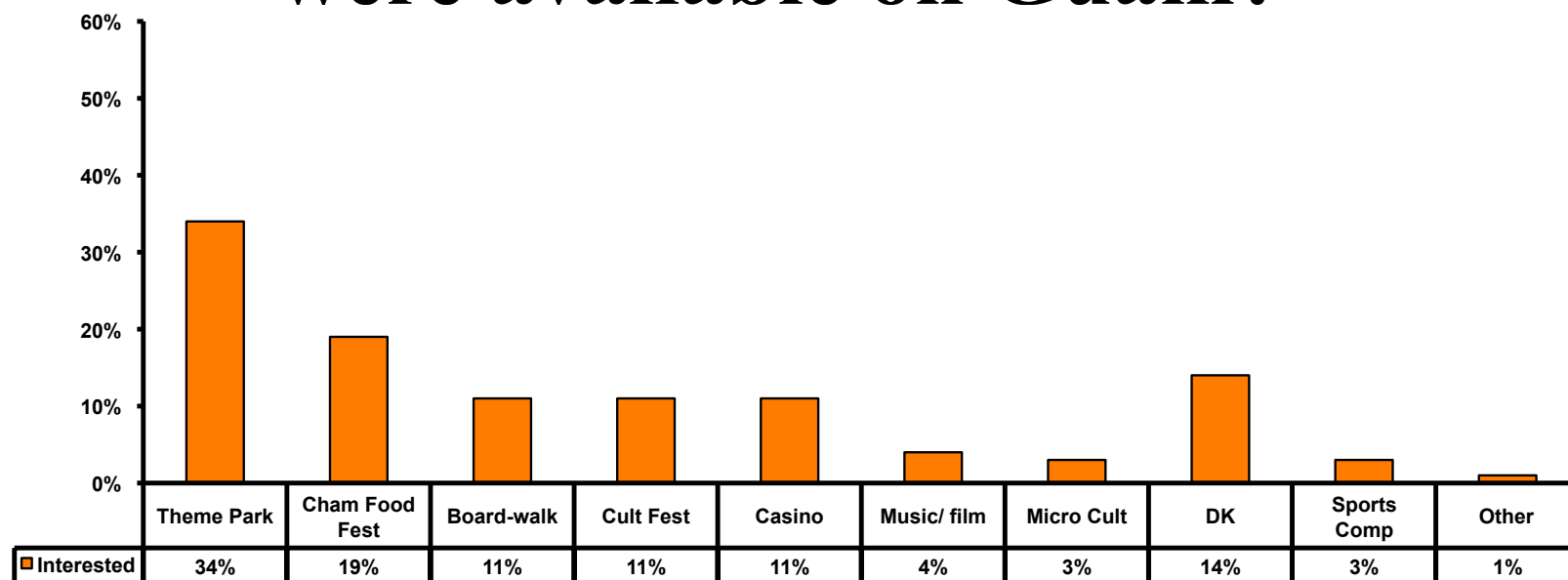
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 22%	Score of 6 to 7 = 19%
Score of 4 to 5 = 78%	Score of 4 to 5 = 77%
Score 1 to 3 = 1%	Score 1 to 3 = 4%
MEAN = 4.7	MEAN = 4.6

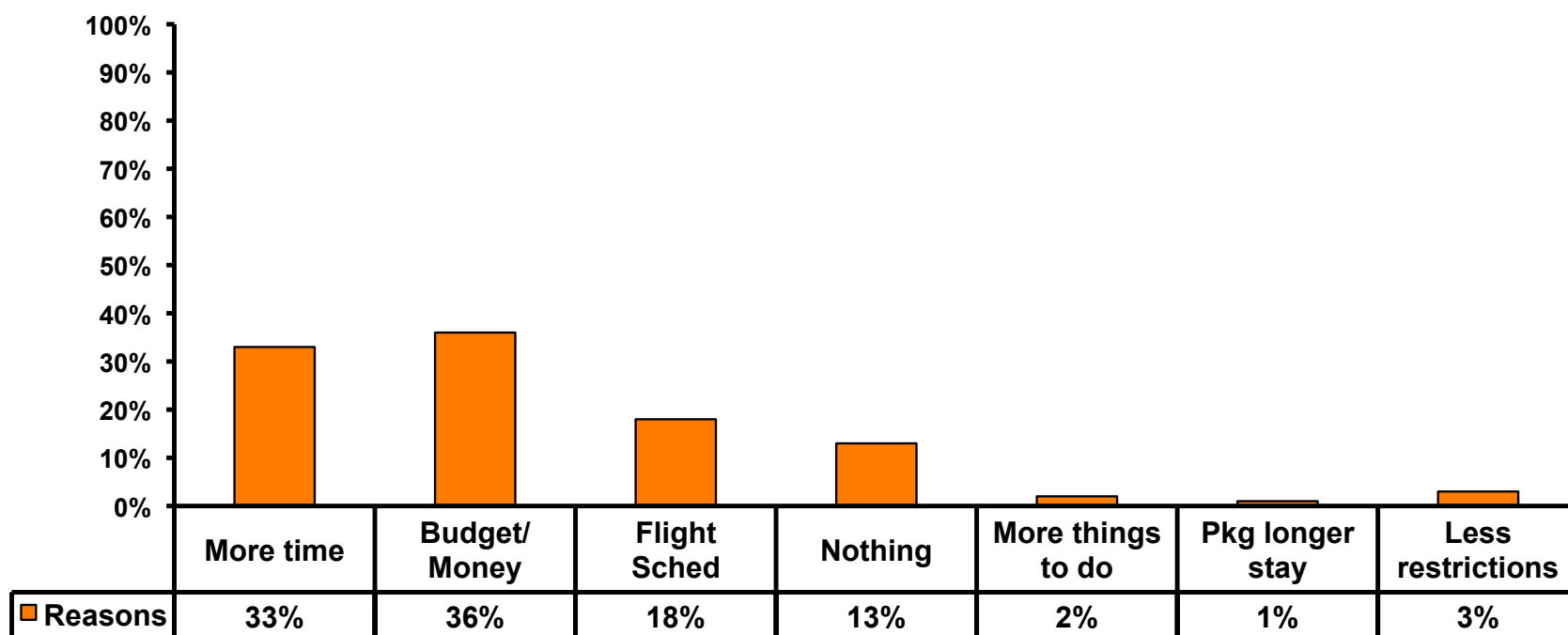
Satisfaction with Other Activities



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



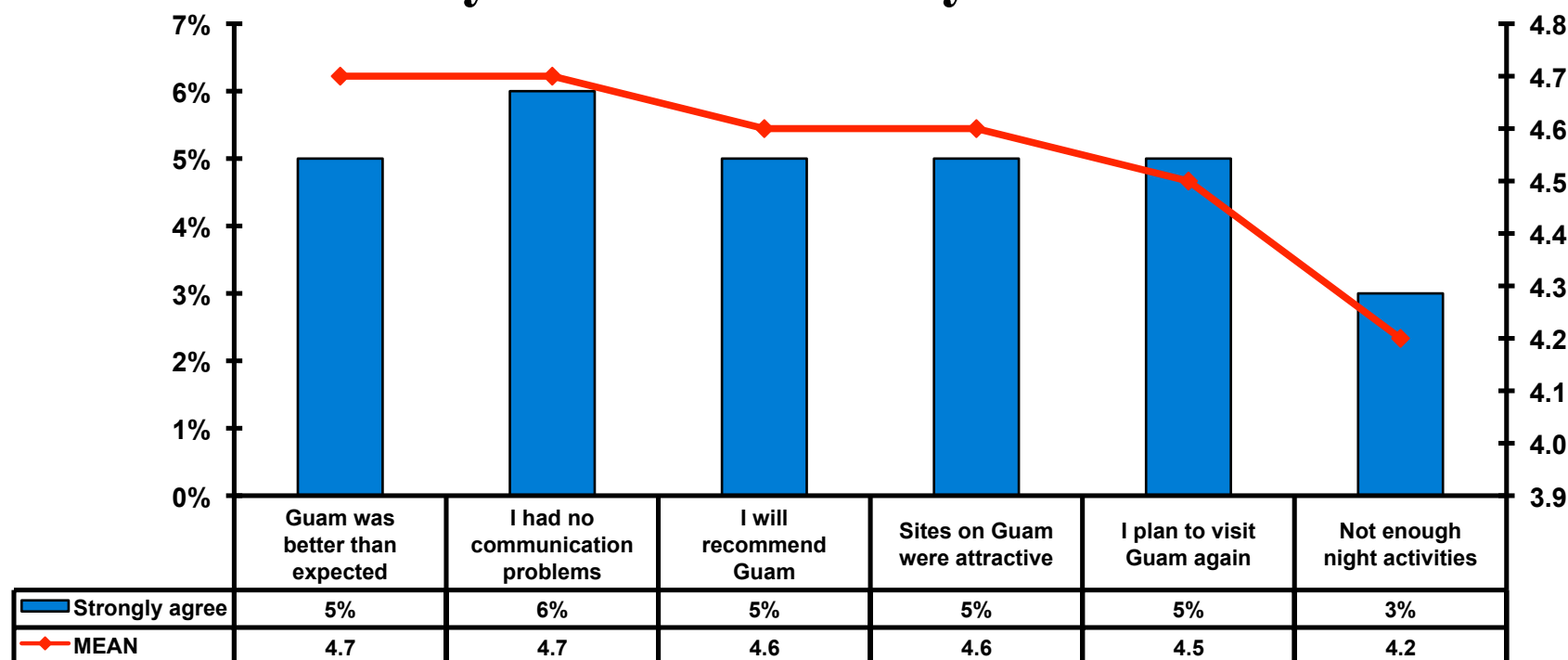
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

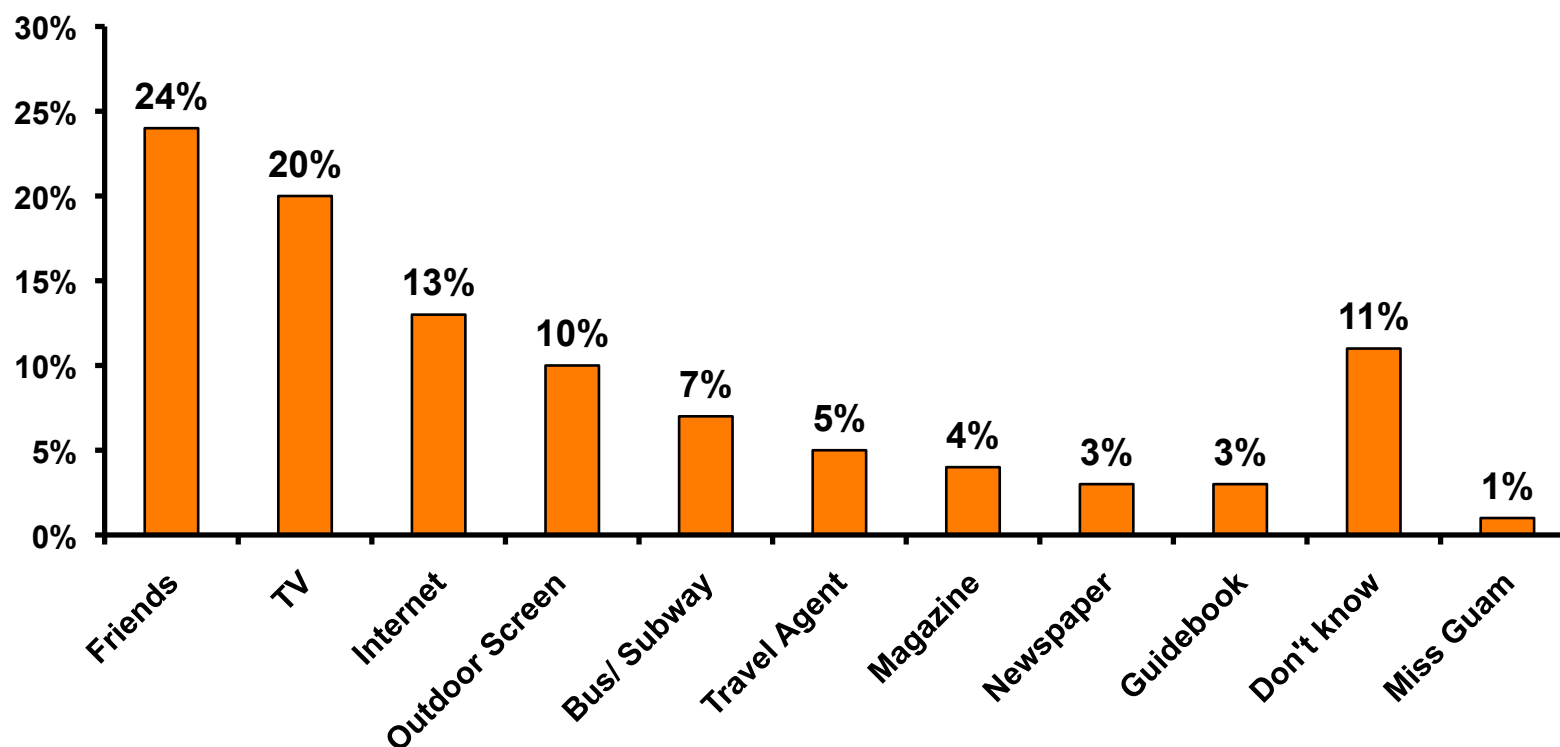
7=Very Satisfied/ 1=Very Dissatisfied



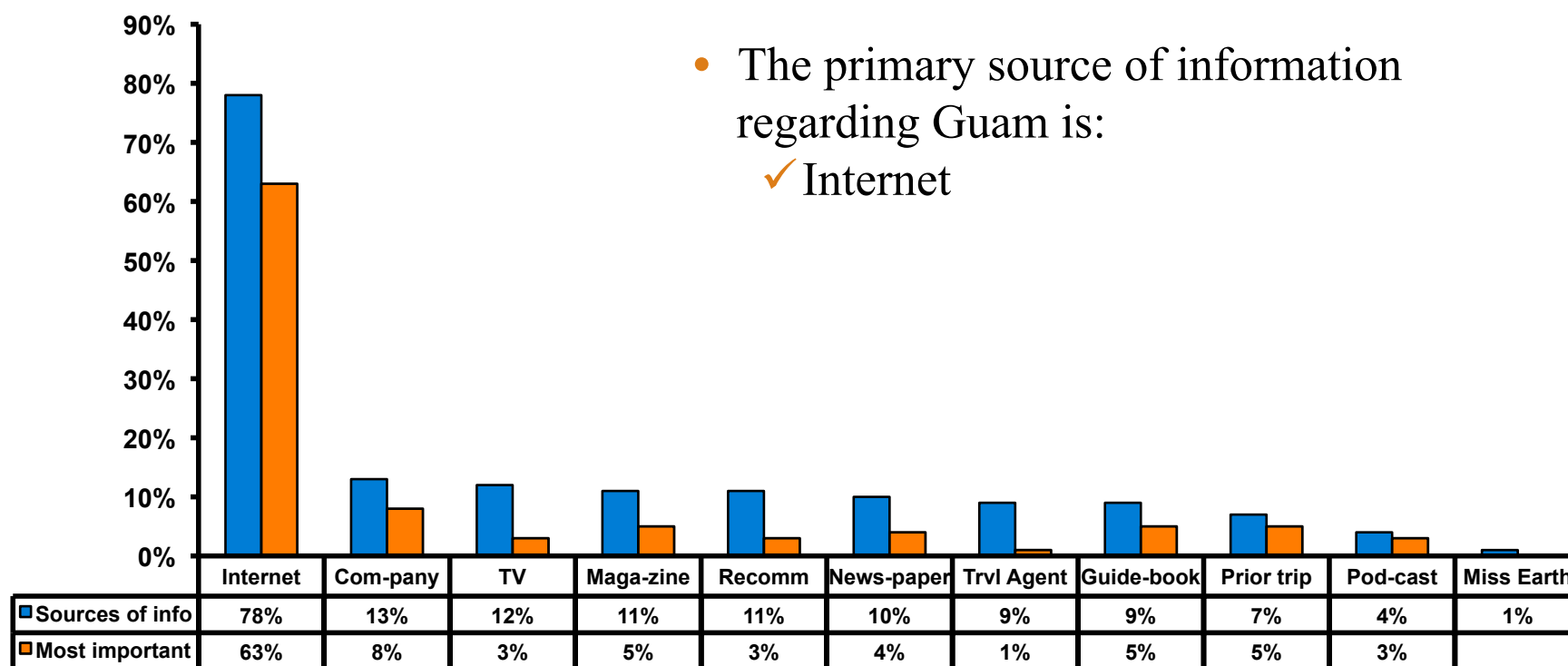
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

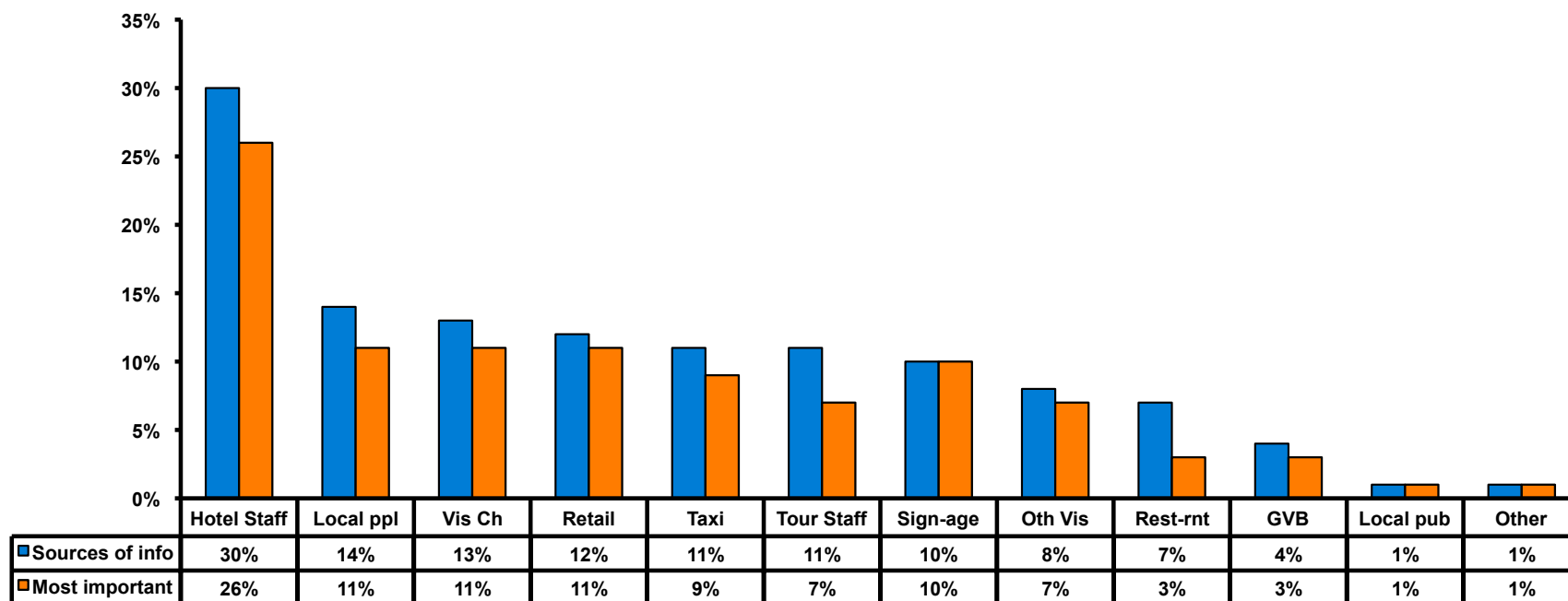


Sources of Information Pre-arrival

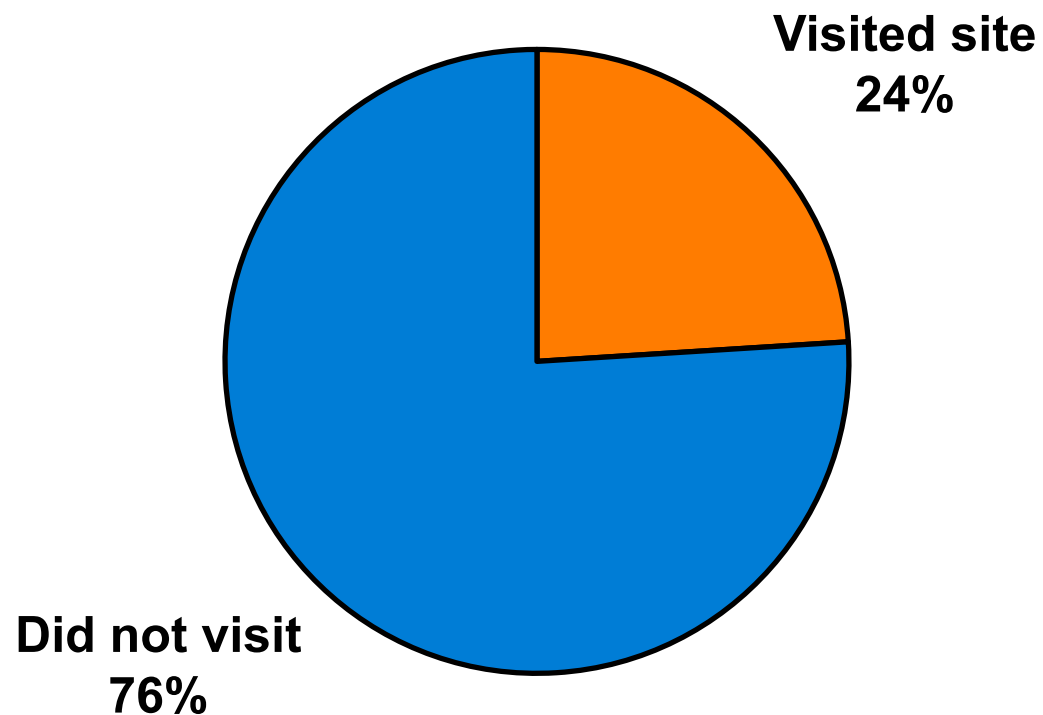


Sources of Information Post-arrival

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

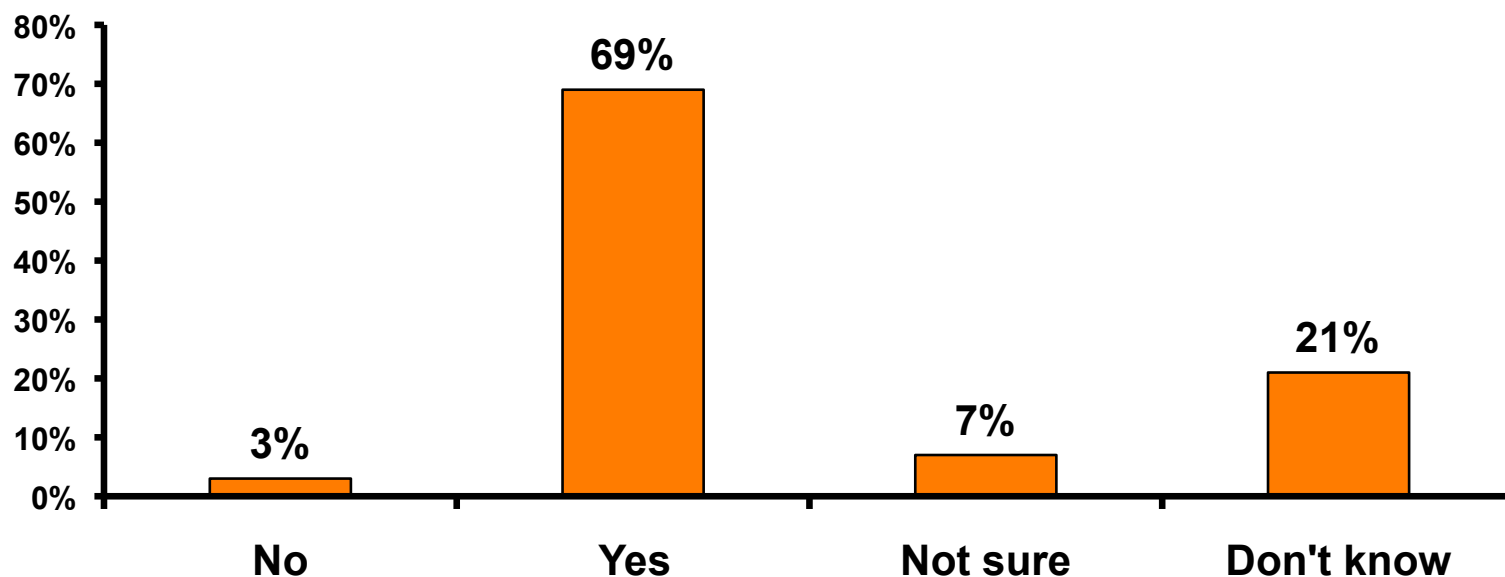


GVB Website



SECTION 6 **OTHER ISSUES**

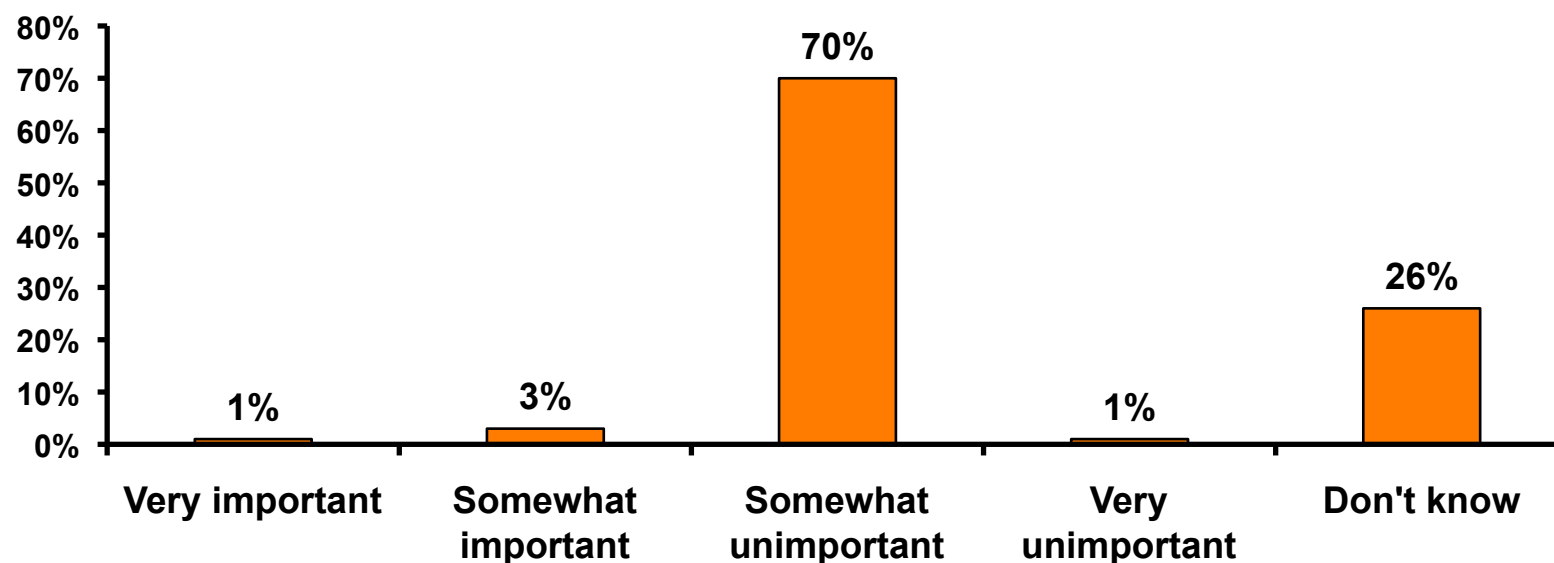
Good time to spend money on travel outside of Hong Kong



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

		AGE				PERSONAL INCOME			
		20-29	30-39	40-49	50+	<240K	240K-1.0M	1.0M-3.0M	3.0M+
Q.22	No	4%	4%				2%		
	Yes	65%	75%	69%	58%		71%	100%	100%
	Not sure	9%	4%	3%	17%	50%	3%		
	Do not know	22%	17%	28%	25%	50%	24%		
Total	Count	54	53	29	12	4	63	3	1

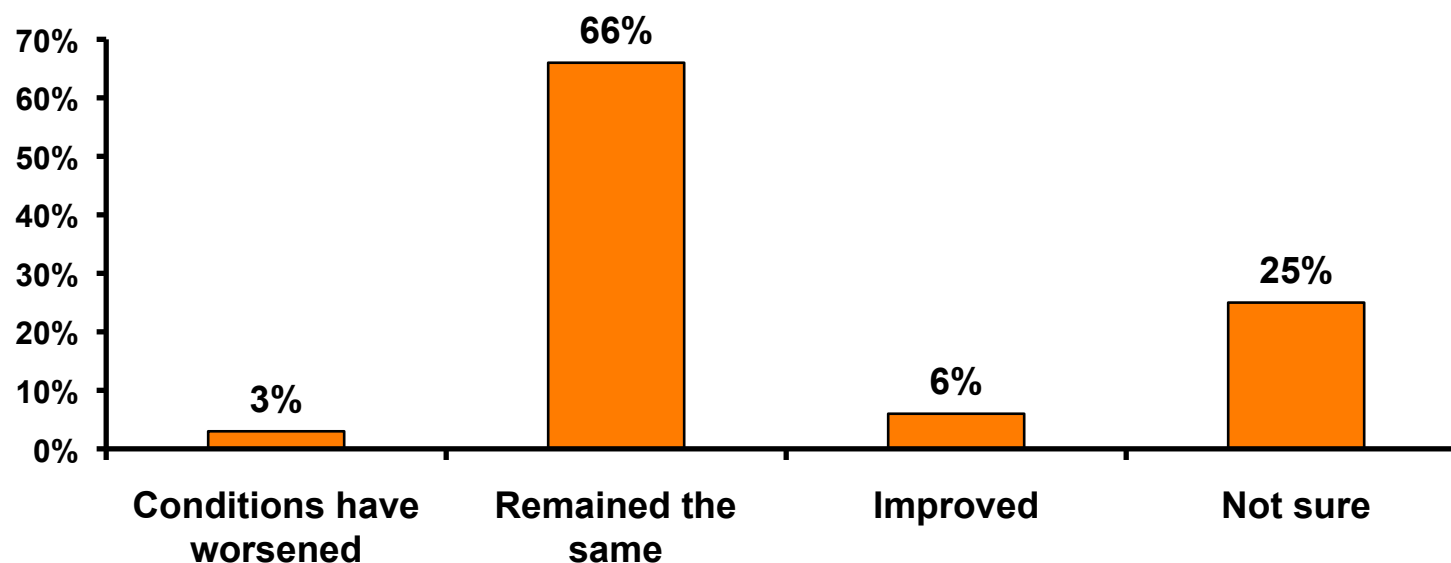
The importance of the state of the Hong Kong economy in decision to travel outside of Hong Kong



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

		AGE				PERSONAL INCOME			
		20-29	30-39	40-49	50+	<240K	240K-1.0M	1.0M-3.0M	3.0M+
Q.23	Very unimportant			4%					
	Somewhat unimportant	67%	77%	64%	69%	25%	73%	33%	100%
	Somewhat important	2%	2%	7%			2%		
	Very important			4%					
	Don't know	31%	21%	21%	31%	75%	26%	67%	
Total	Count	54	52	28	13	4	62	3	1

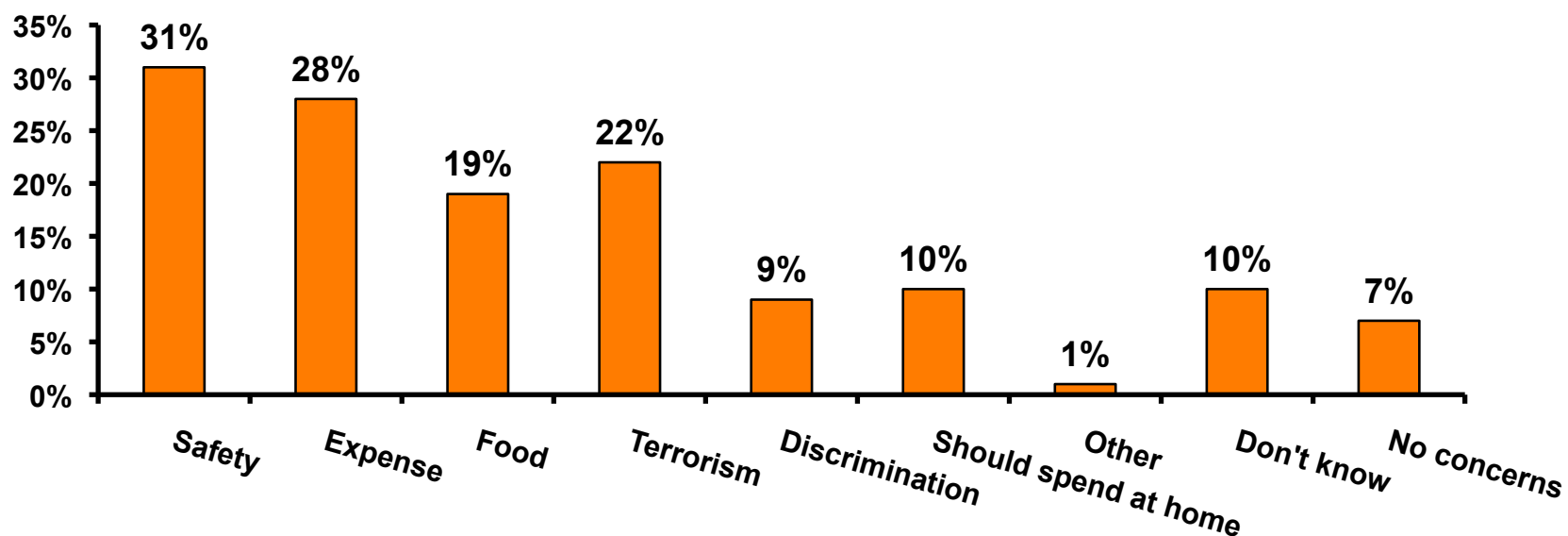
Rating Hong Kong Economy Compared to 12 months ago



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

		AGE				PERSONAL INCOME			
		20-29	30-39	40-49	50+	<240K	240K-1.0M	1.0M-3.0M	3.0M+
Q.21	Conditions have worsened		7%	3%		25%	2%		
	Conditions have remained the same	60%	69%	76%	54%	50%	69%	67%	
	Conditions have improved	7%	6%		15%		5%	33%	
	Do not know	33%	19%	21%	31%	25%	25%		100%
Total	Count	55	54	29	13	4	64	3	1

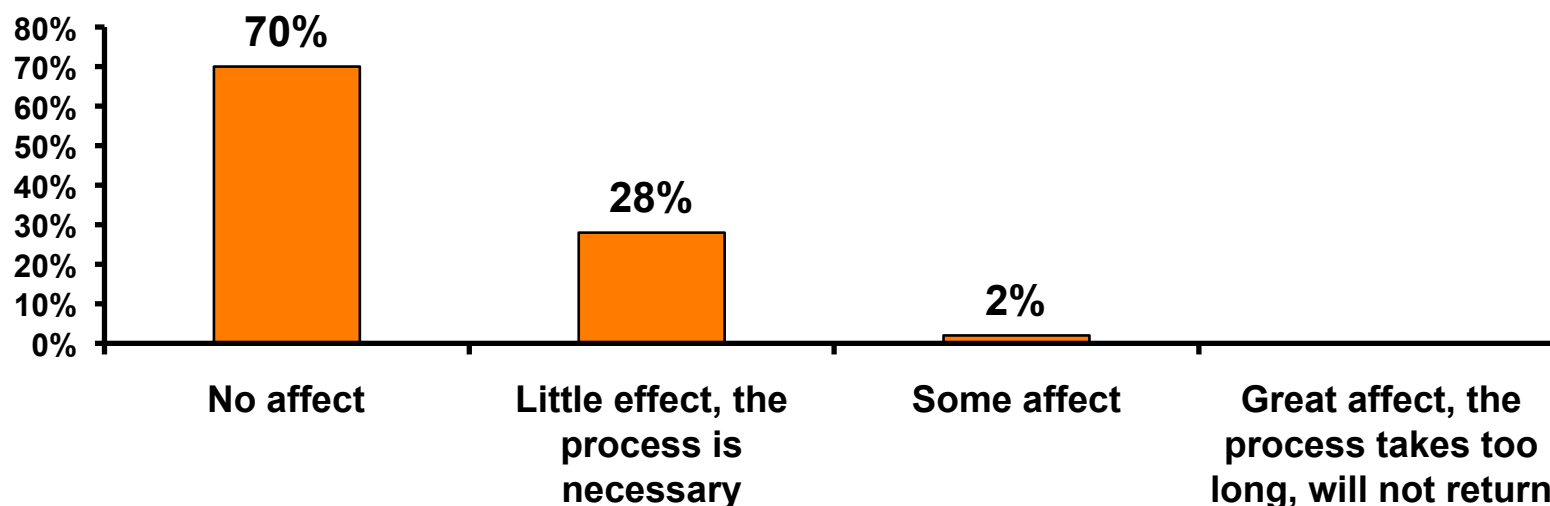
Concerns about travel outside of Hong Kong - Overall



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	3.0M+
Q.24	Safety at my destination	29%	30%	38%	23%	25%	23%	100%	100%
	Expense	27%	37%	14%	23%	75%	23%	67%	100%
	Terrorism	22%	28%	10%	31%	25%	30%	67%	100%
	Food	20%	26%	7%	15%	50%	17%	67%	
	Don't know	13%	7%	10%	8%	25%	9%		
	Spending money abroad when it should be spent at home	5%	13%	14%	8%	25%	8%		
	Discrimination against Hong Kong	13%	7%	7%			8%		
	No concerns	13%	2%	7%			8%		
	Other	2%							
Total	Cases	55	54	29	13	4	64	3	1

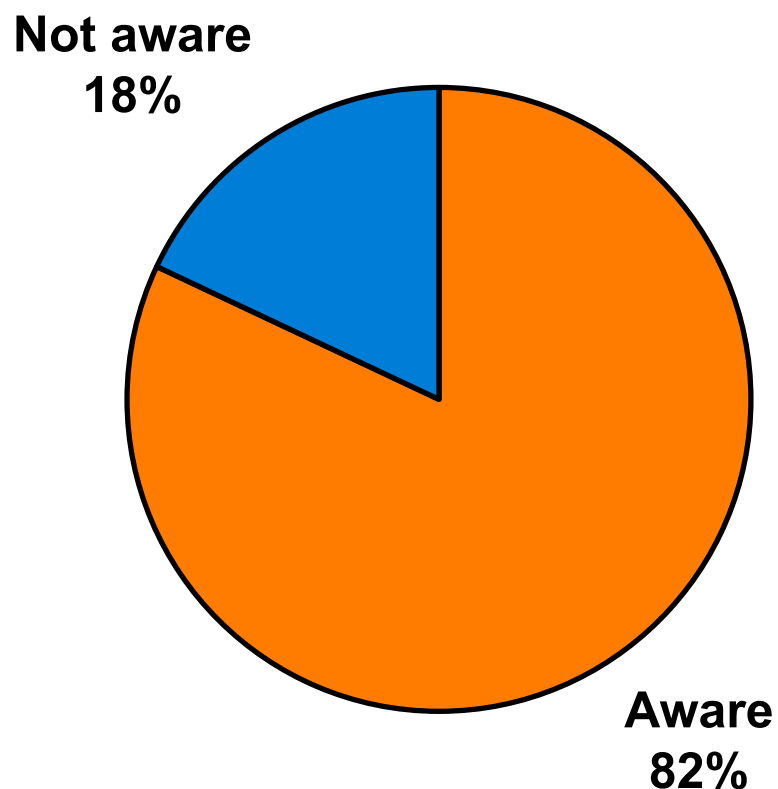
Security Screening/ Immigration Process at Guam International Airport



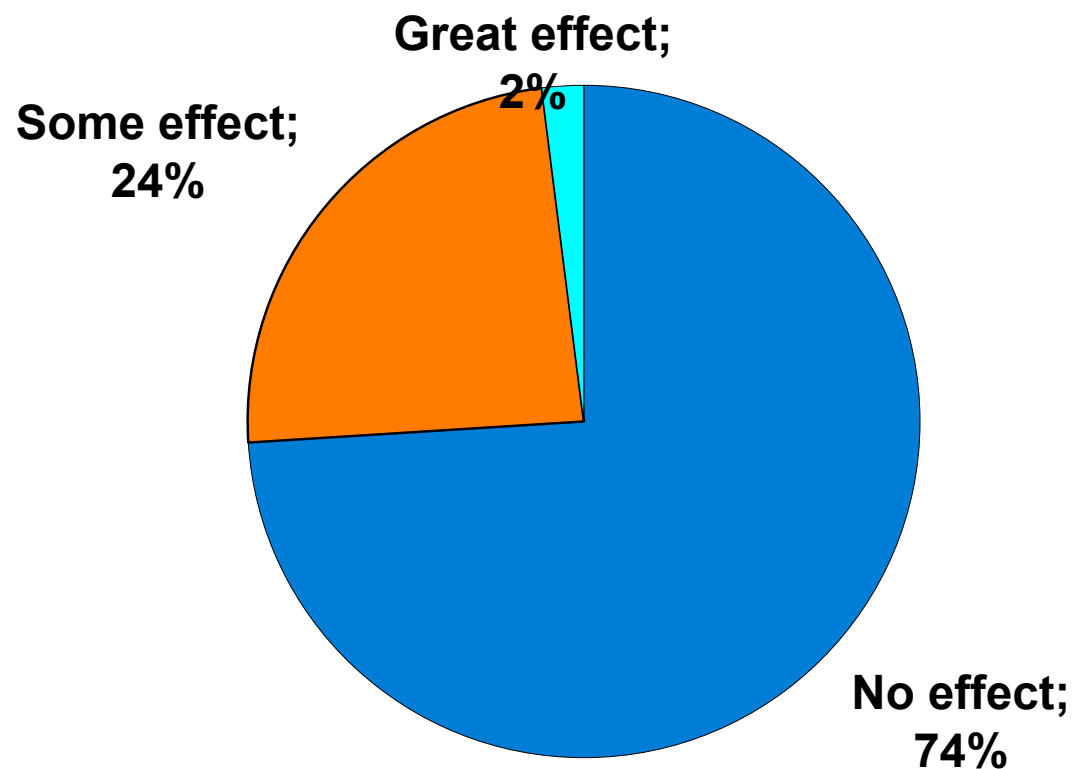
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **4.1** out of possible 7.0
- Agree (Score 6-7) – **24%**
- Neutral (Score 4-5) – **33%**
- Disagree (Score 1-3) – **43%**

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



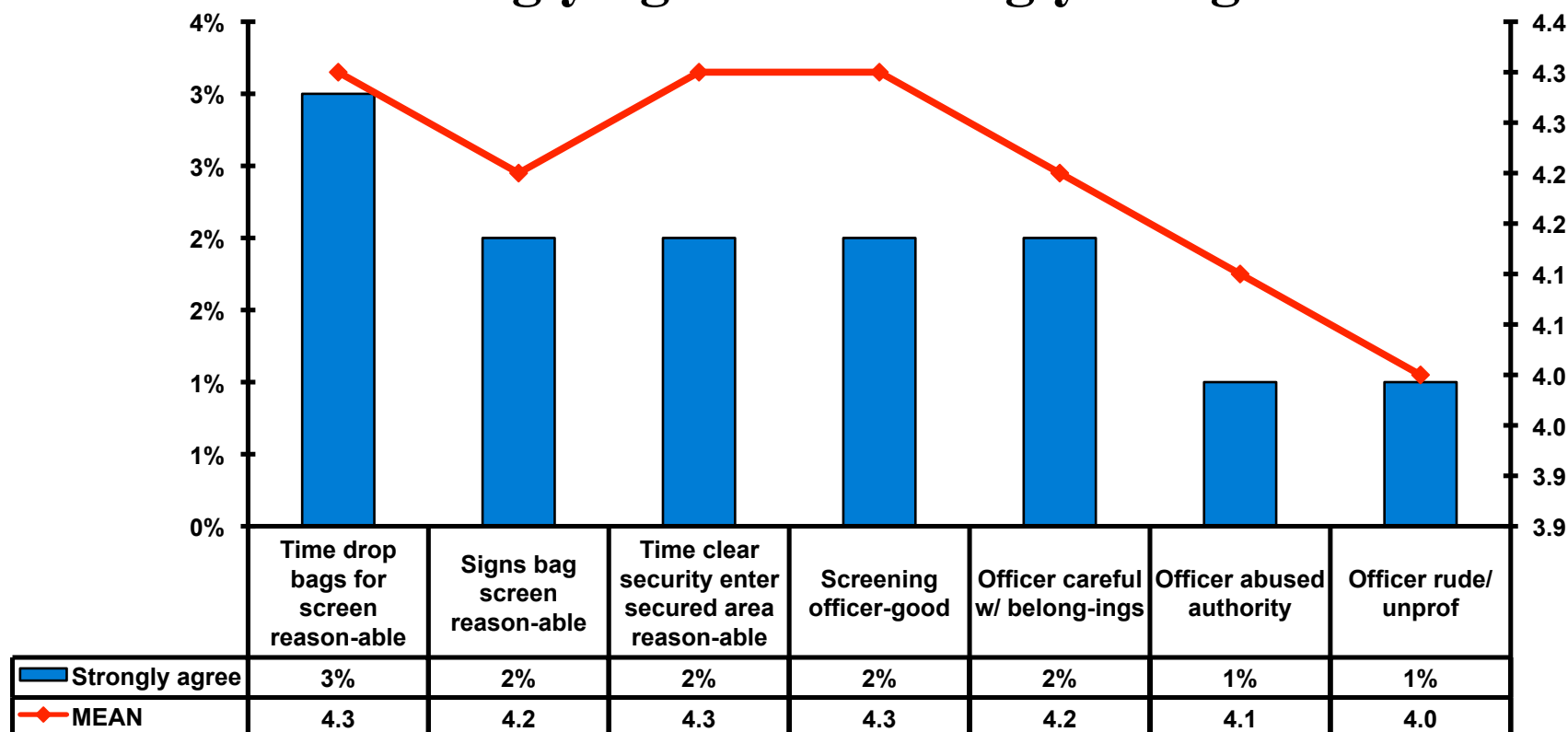
Effects of U.S. military troop movement on future trips to Guam



Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



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

