

Guam Visitors Bureau

Hong Kong Visitor Tracker Exit Profile

FY2017 DATA AGGREGATION

Prepared by: Anthology Research

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Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Chinese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **227** 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 **227** is +/- 6.50 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 +/- 6.50 percentage points.

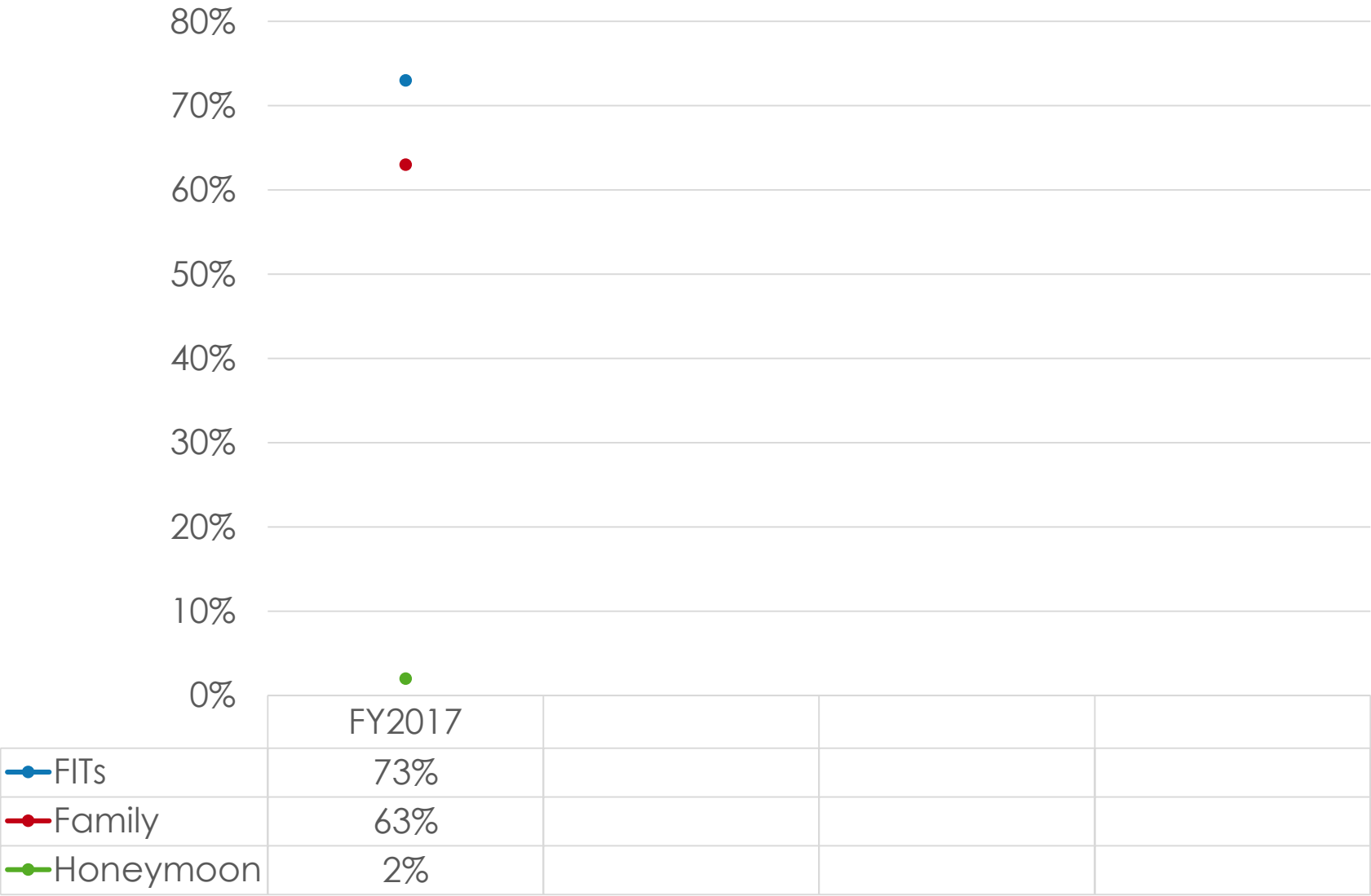
Objectives

- To monitor the effectiveness of the 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.

Key Highlighted Segments

- **The specific objectives were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - FITs (Q7)
 - Honeymoon (Q5A)
 - Family (Q6)
 - To identify the most significant factors affecting overall visitor satisfaction.
 - To identify (for all Hong Kong visitors) the most important determinants of on-island spending

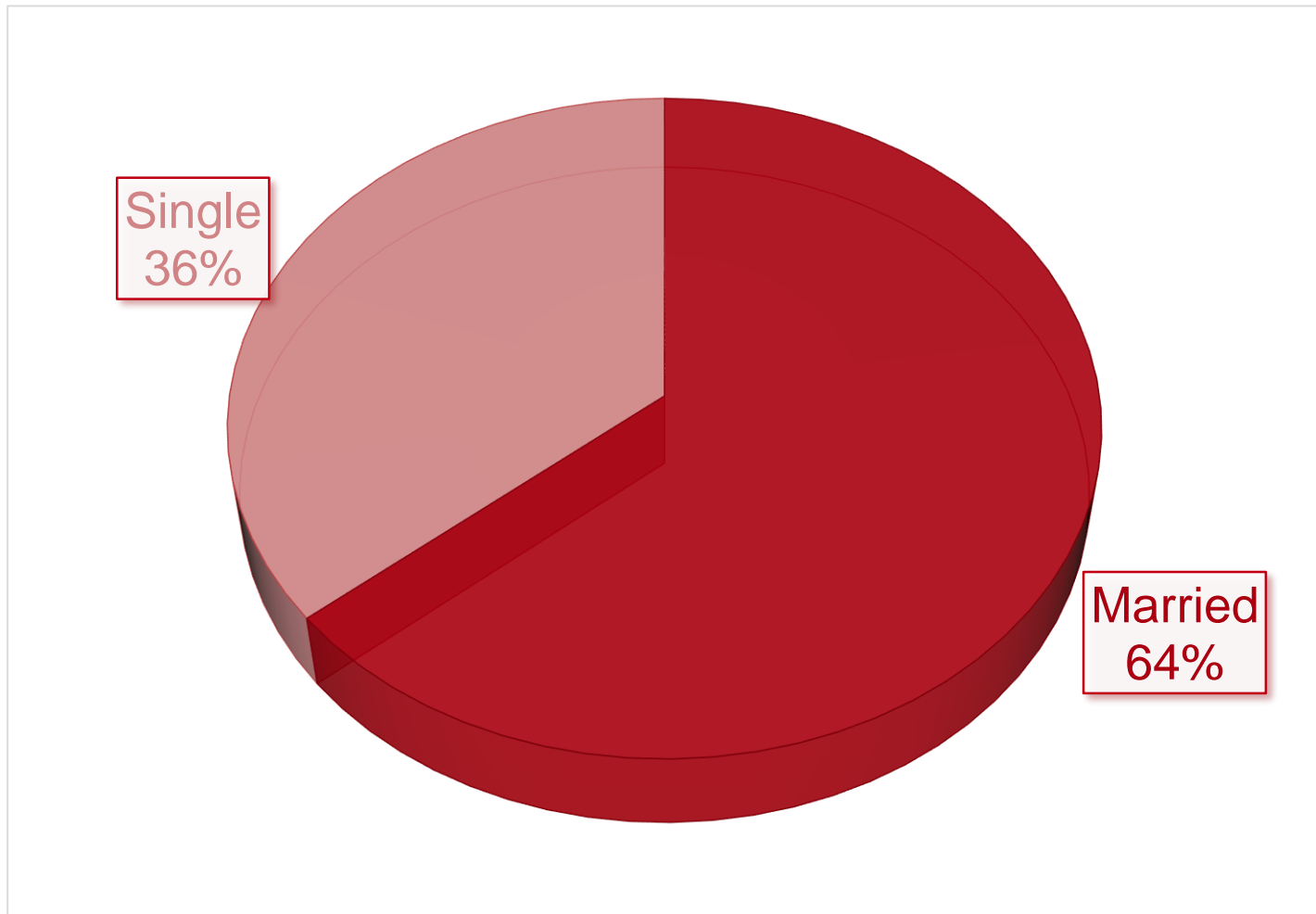
KEY HIGHLIGHTED SEGMENTS



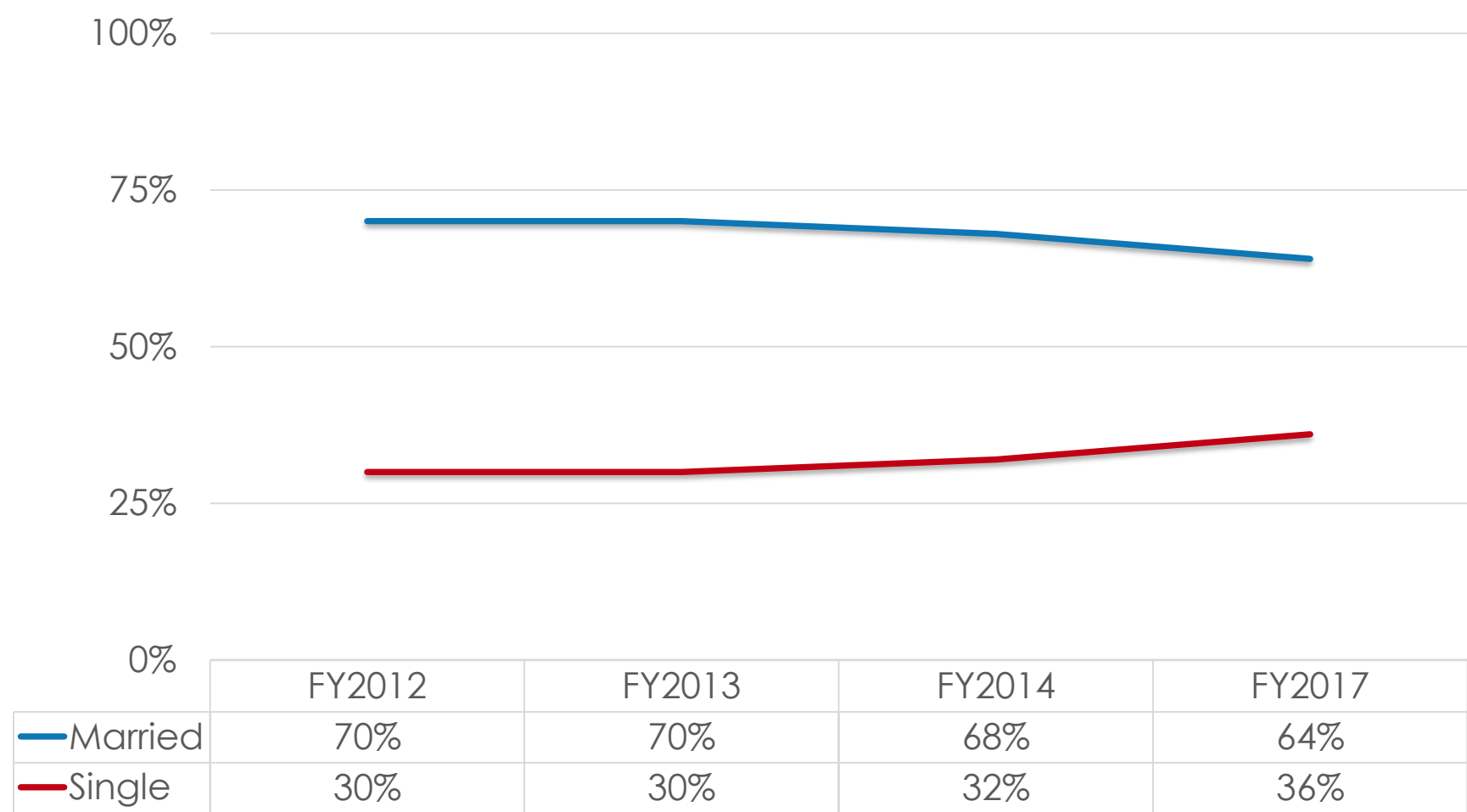
SECTION 1

PROFILE OF RESPONDENTS

Marital Status

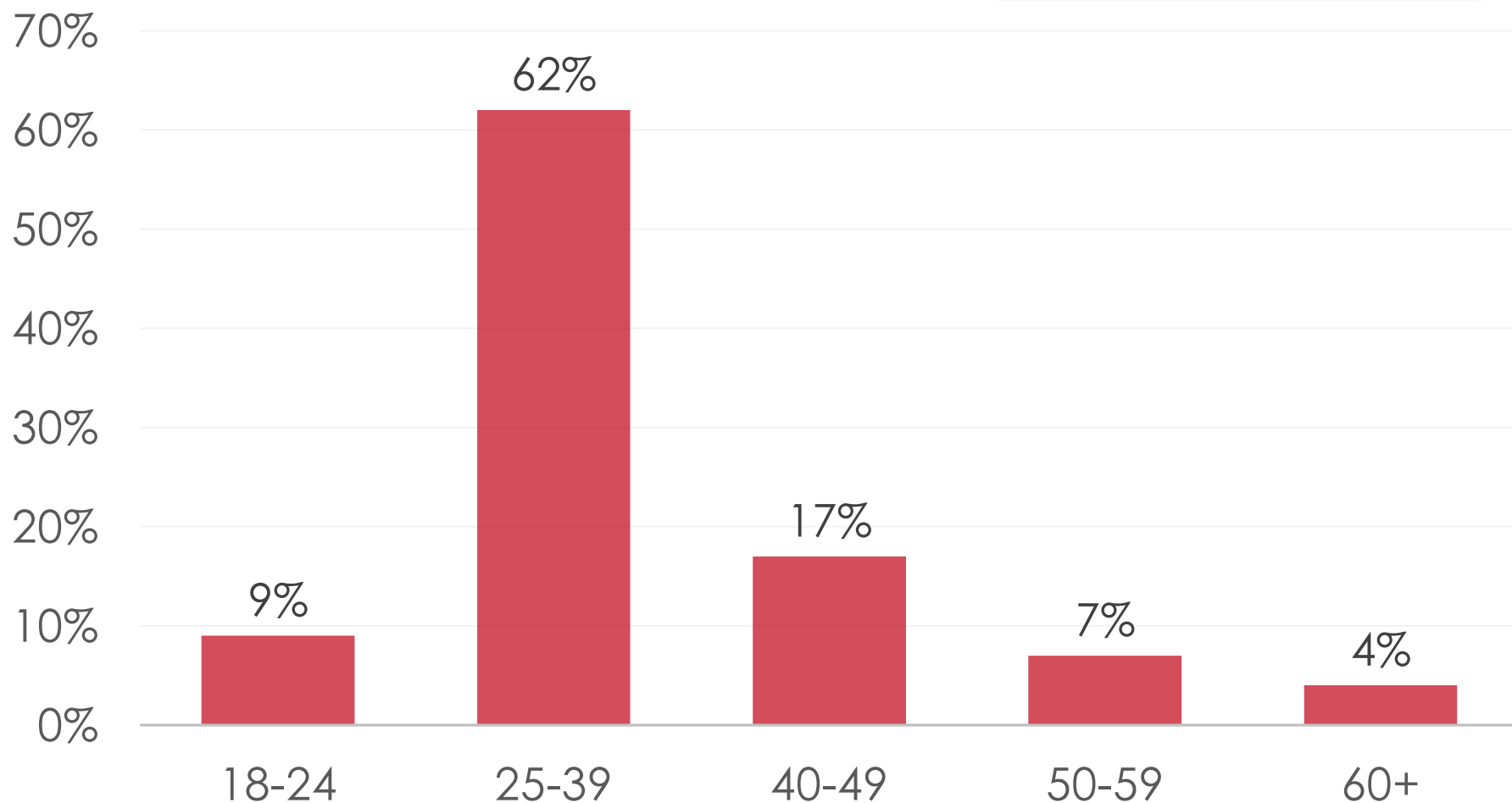


Marital status – Tracking

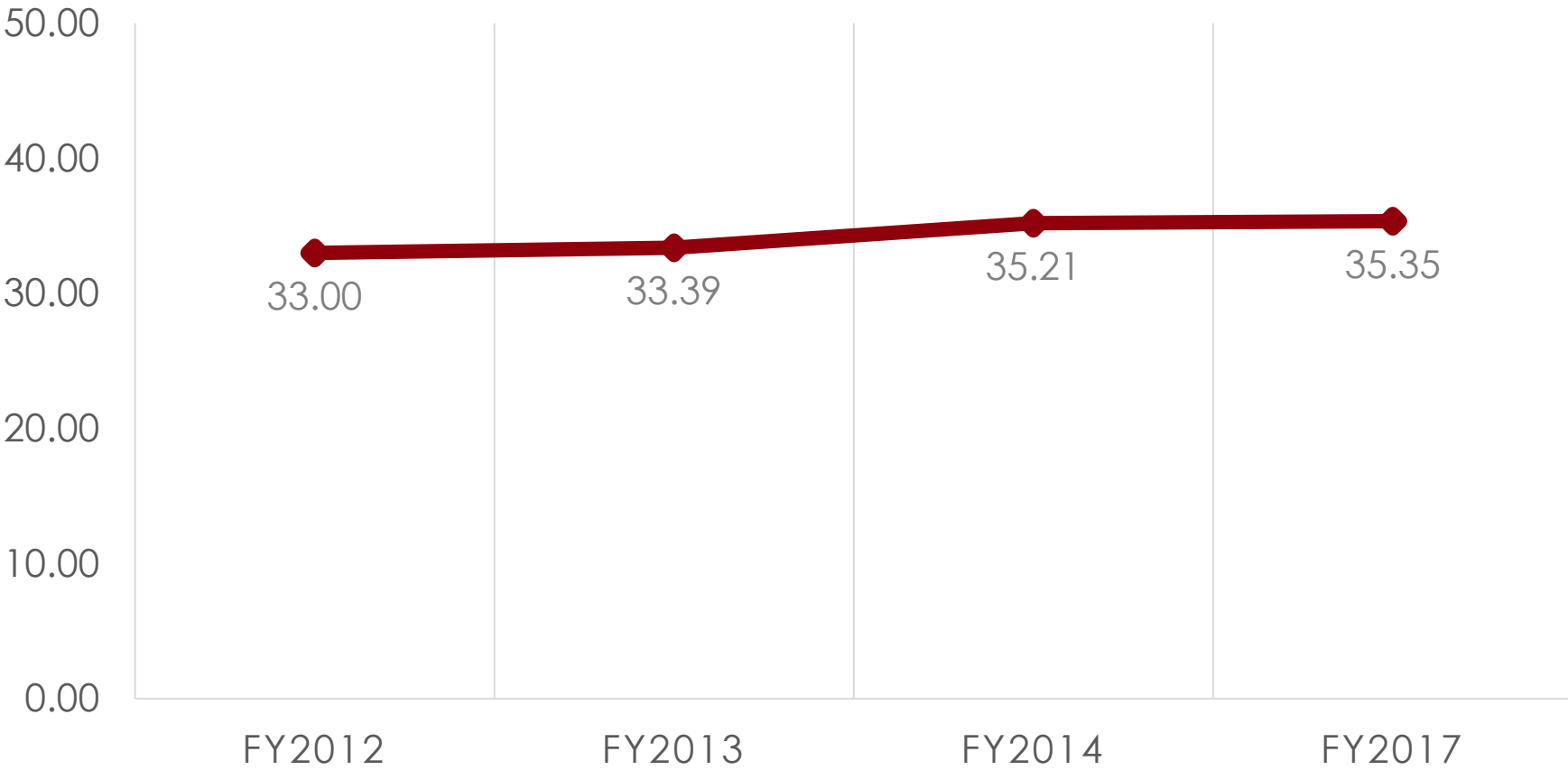


Age

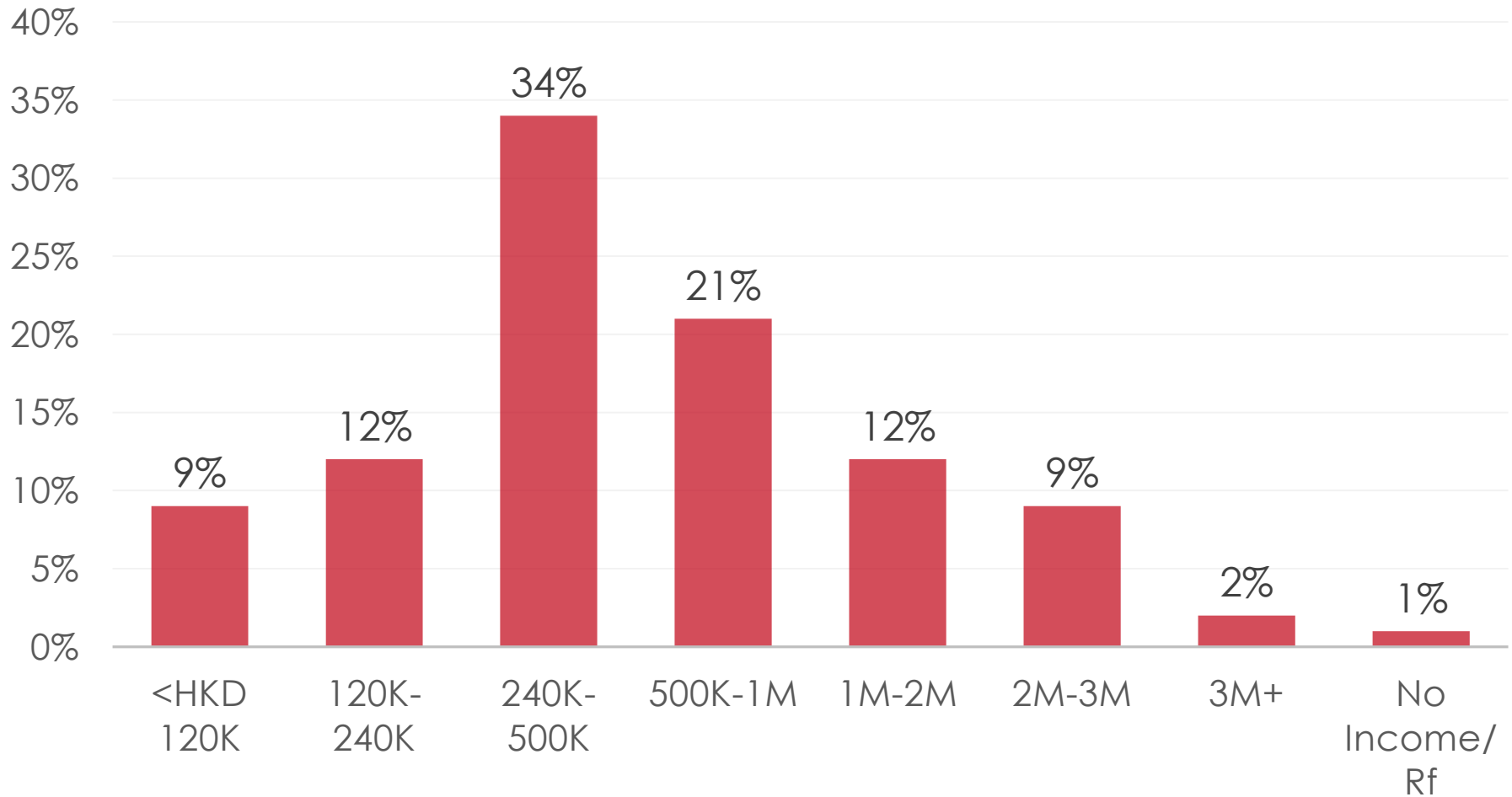
MEAN = 35.35
MEDIAN = 33



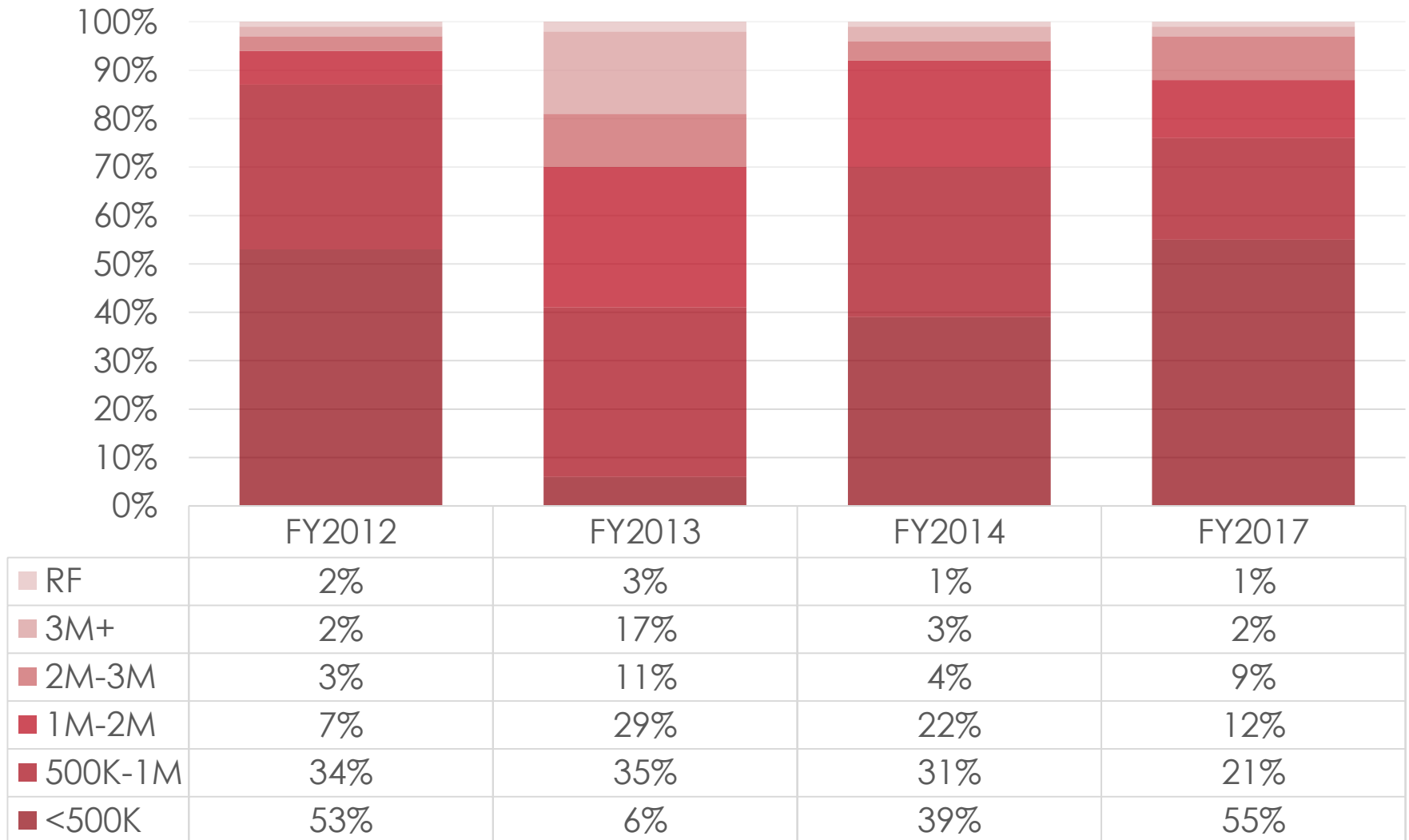
Age – Tracking



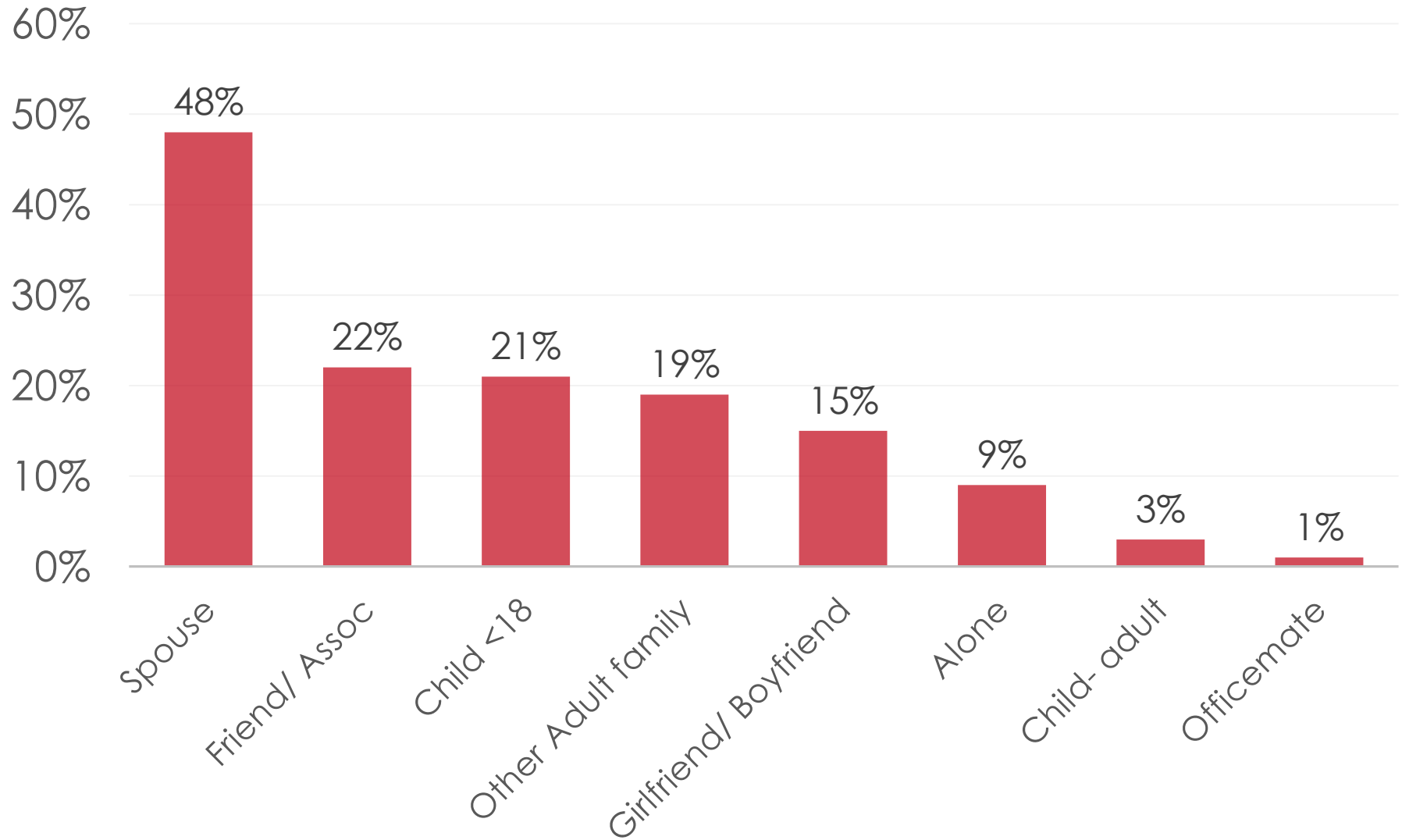
Annual Household Income



Annual Household Income - Tracking



Travel Party



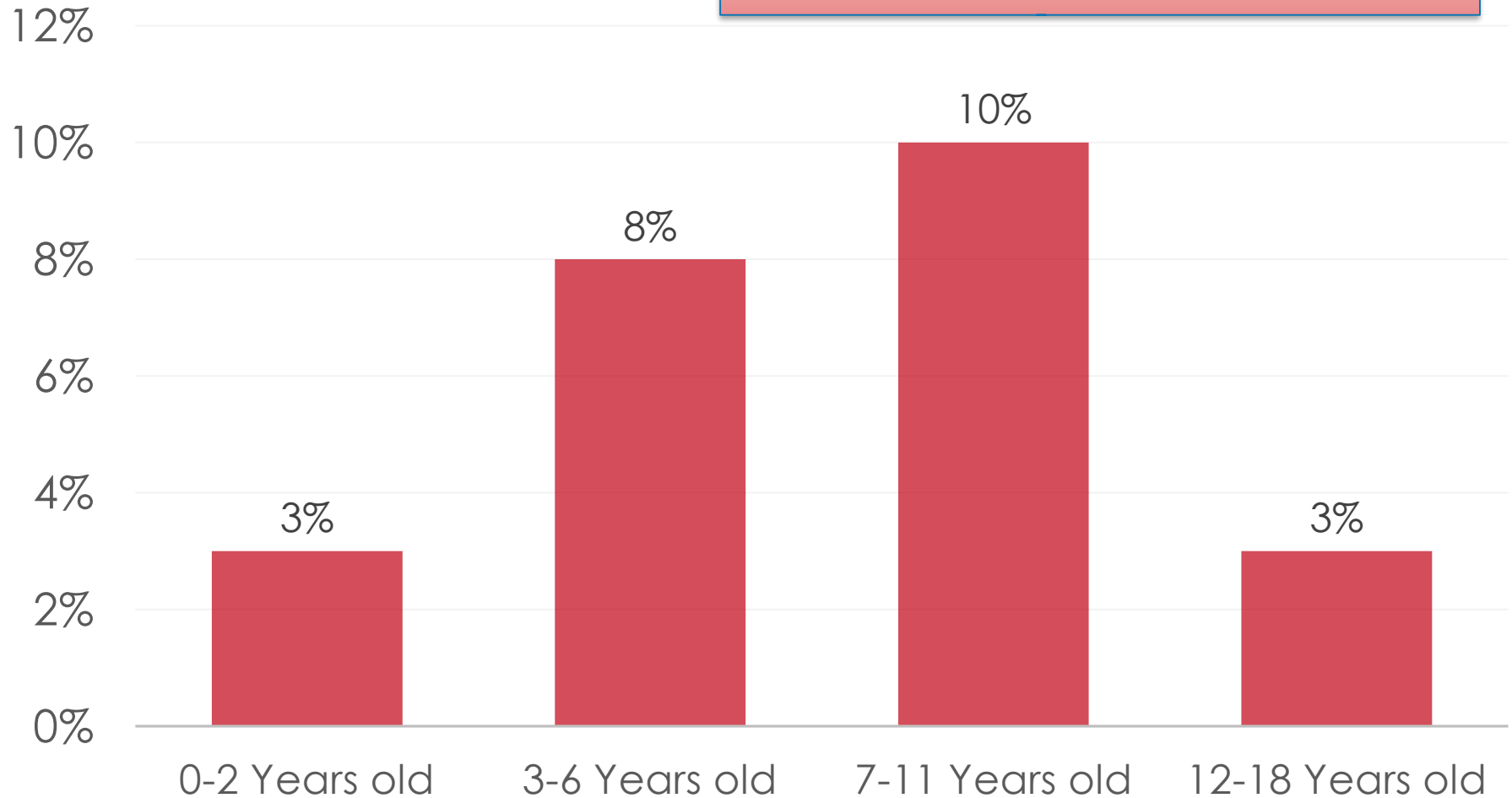
Travel Party



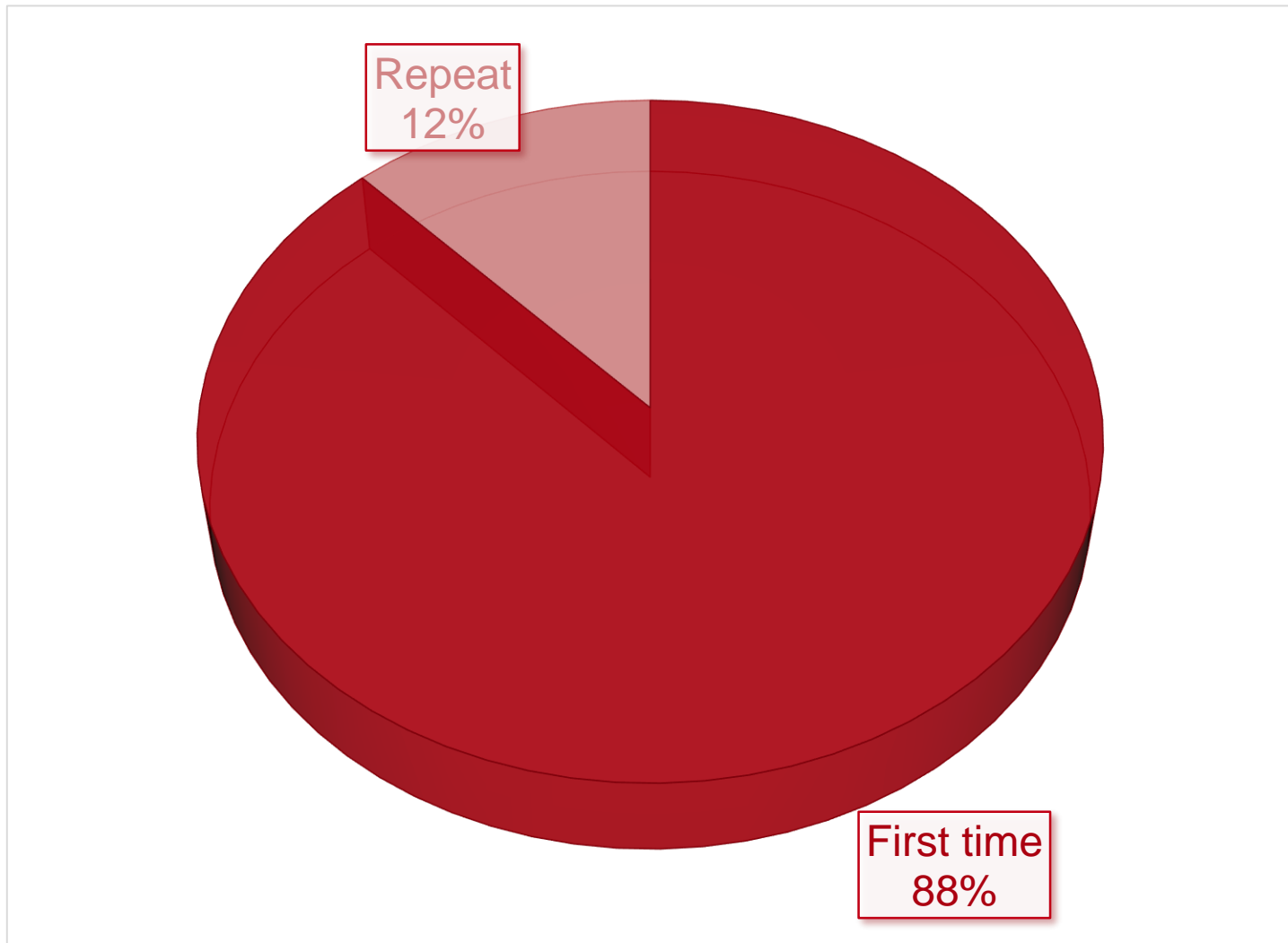
Spouse	48%		
Child <18	21%		
Friend/ Assoc	22%		
Other Adult Family	19%		
Alone	9%		
Girlfriend/ Boyfriend	15%		
Child- Adult	3%		
Office	1%		

Travel Party - Children

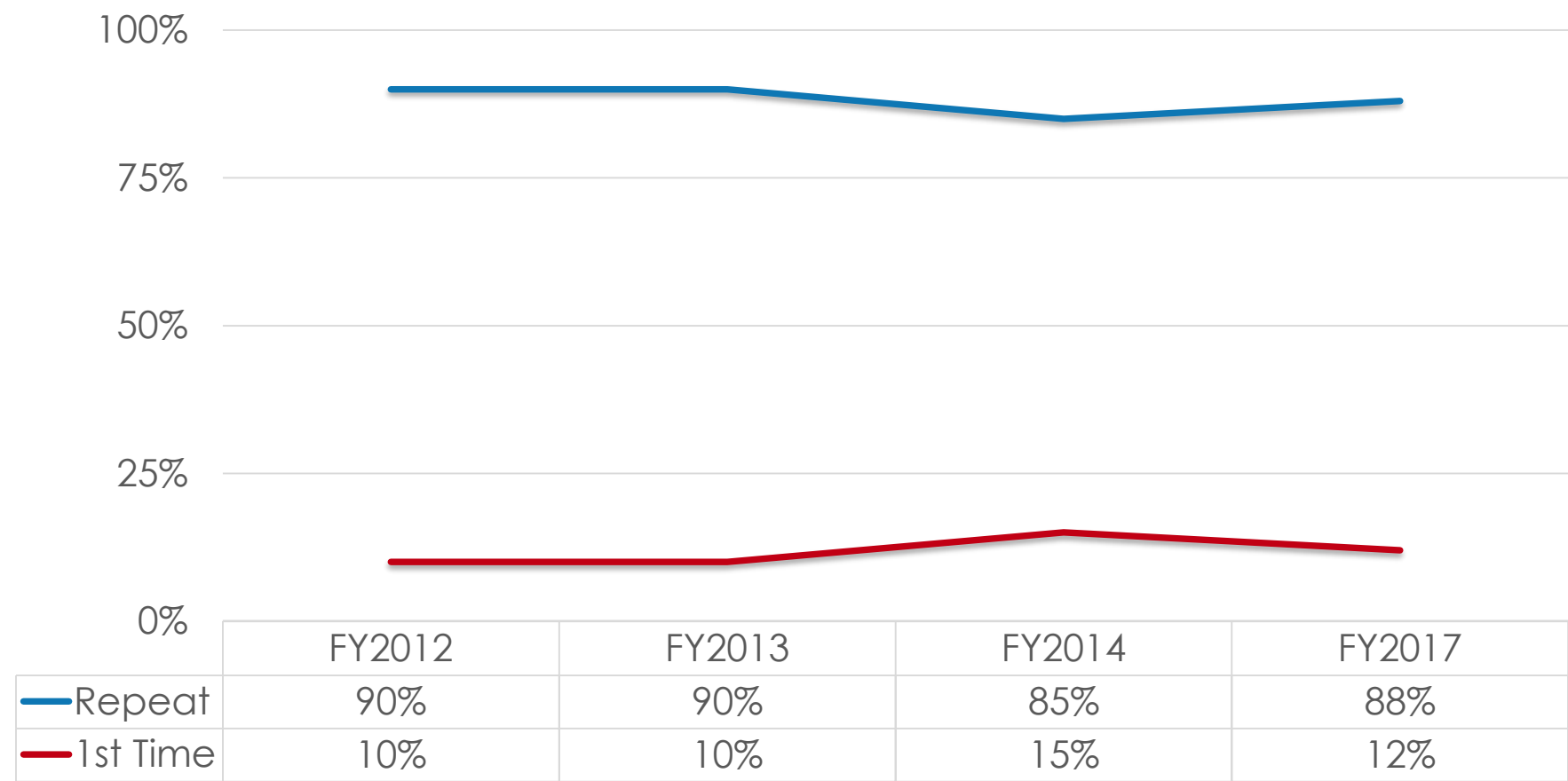
21% TRAVELING WITH A CHILD



Trips to Guam

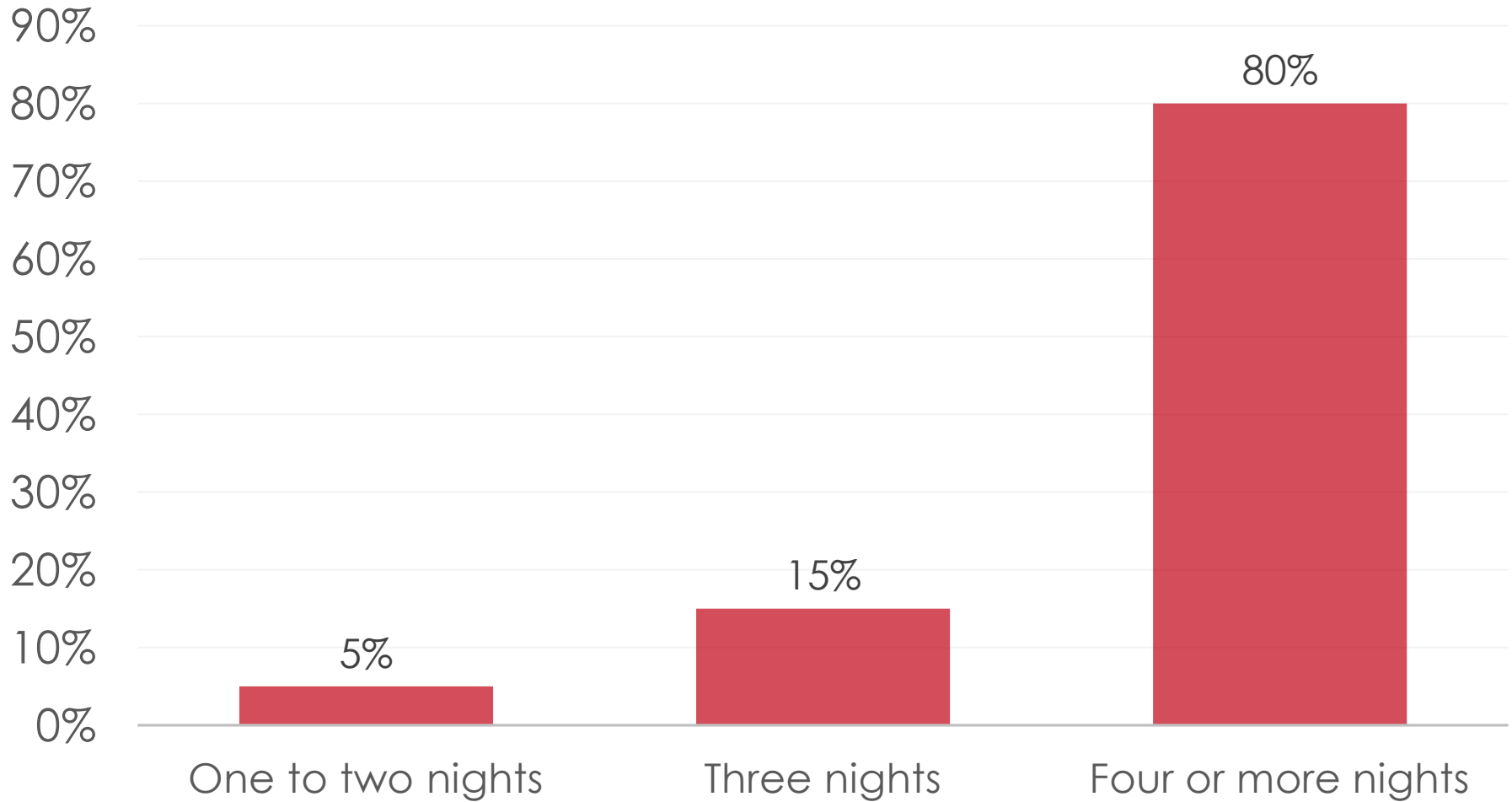


Trips to Guam – Tracking

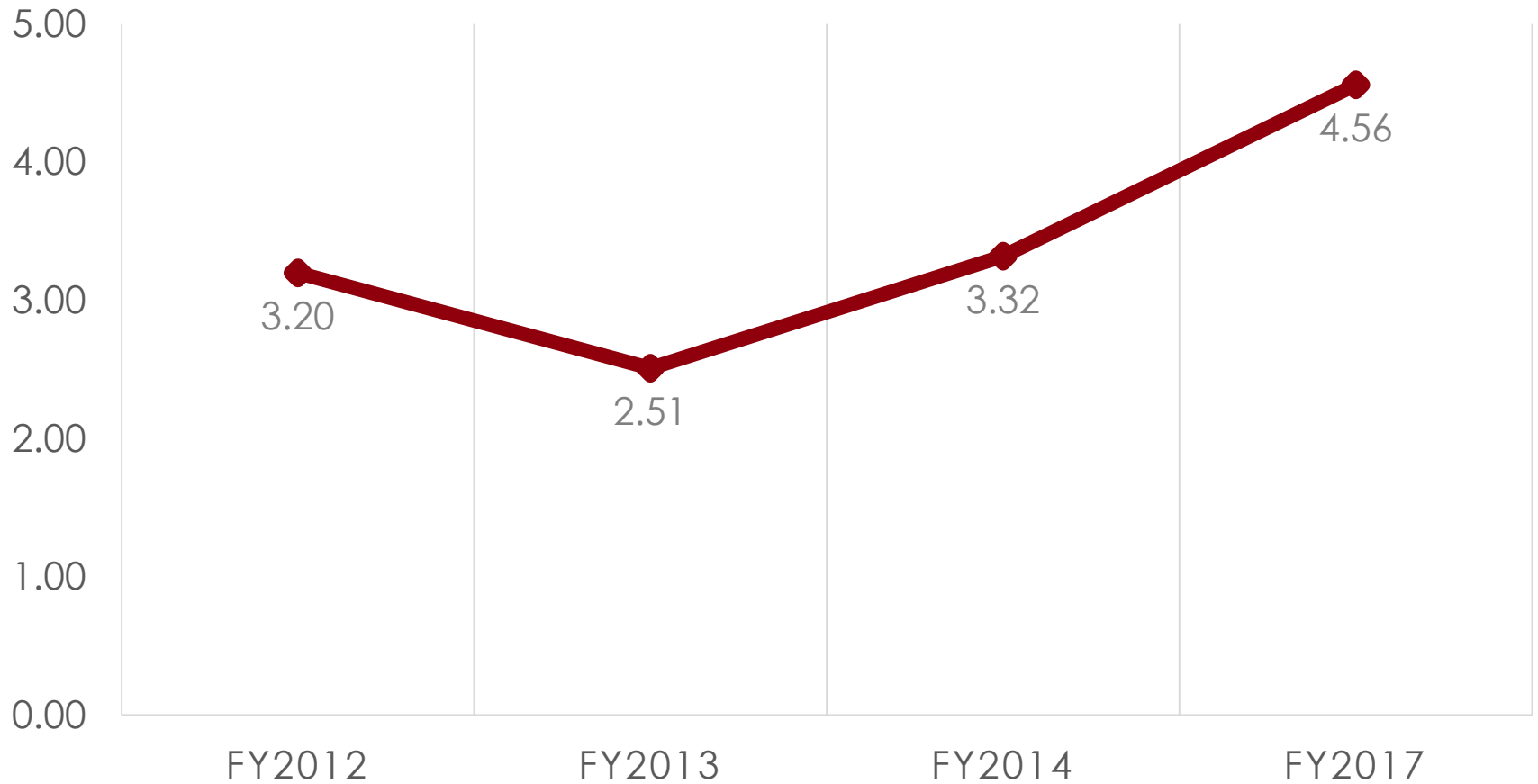


Length of Stay

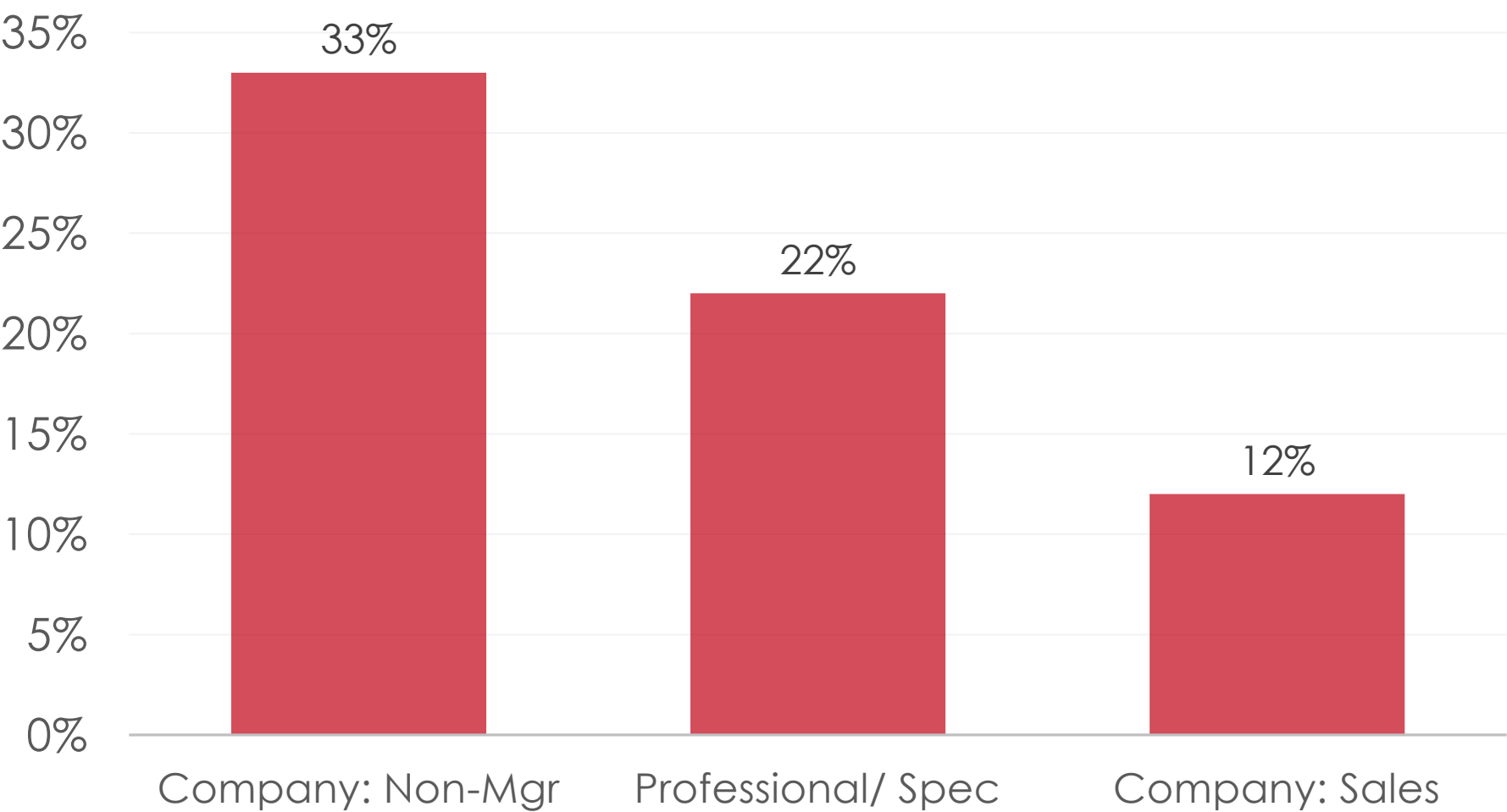
MEAN NUMBER OF NIGHTS = 4.56
MEDIAN NUMBER OF NIGHTS = 4



Length of Stay –Tracking



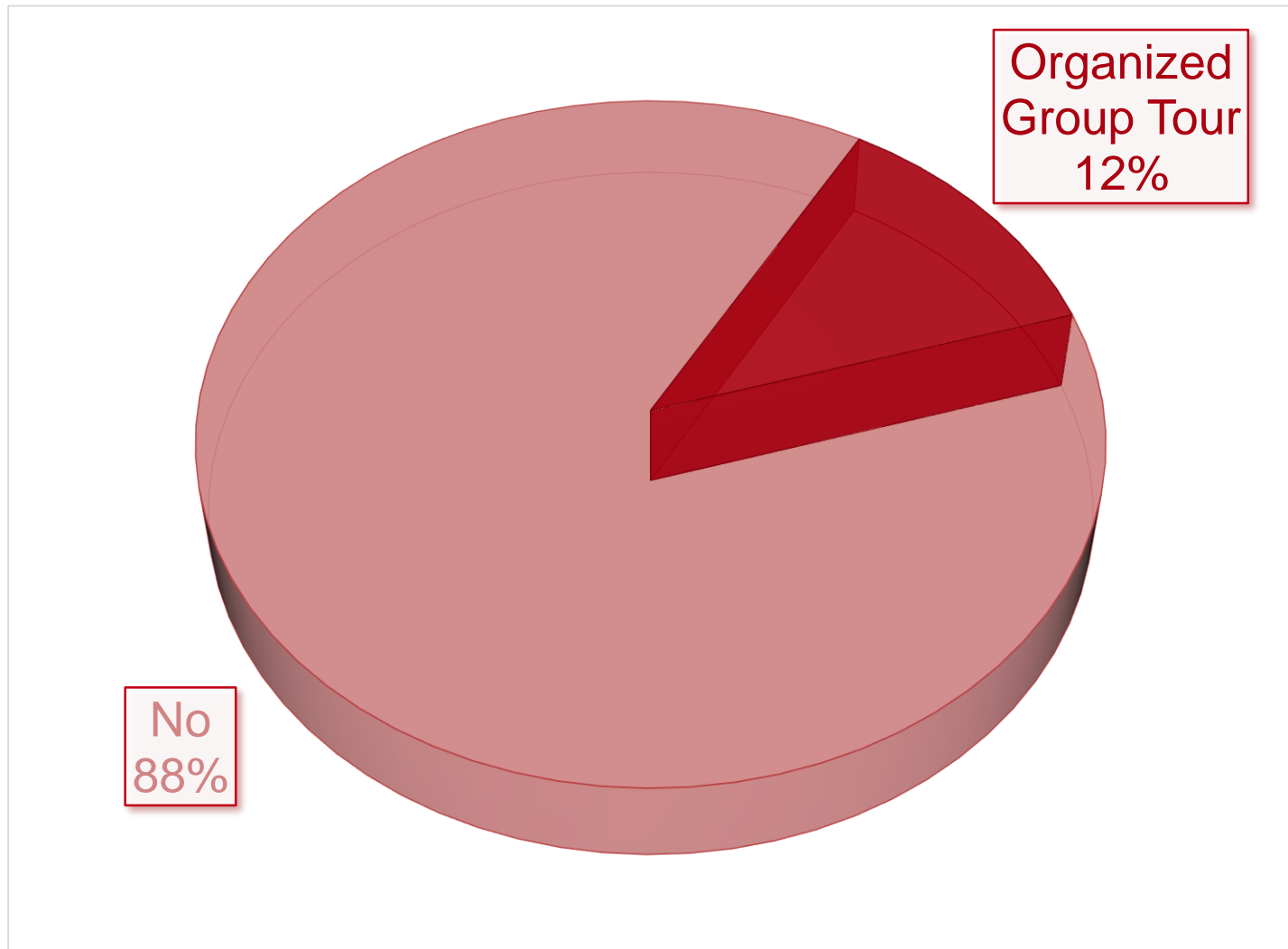
Occupation – Top Responses (10%+)



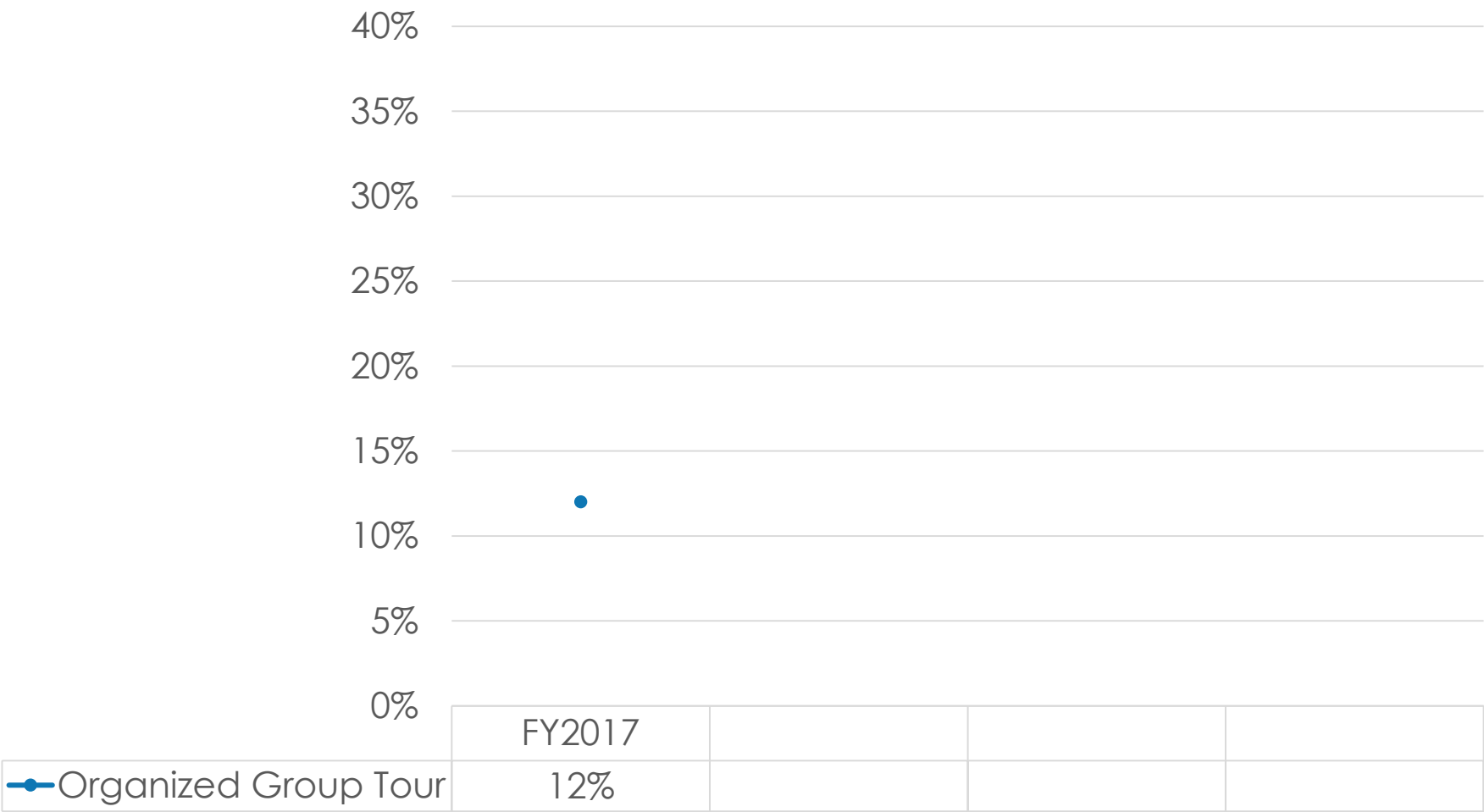
SECTION 2

TRAVEL PLANNING

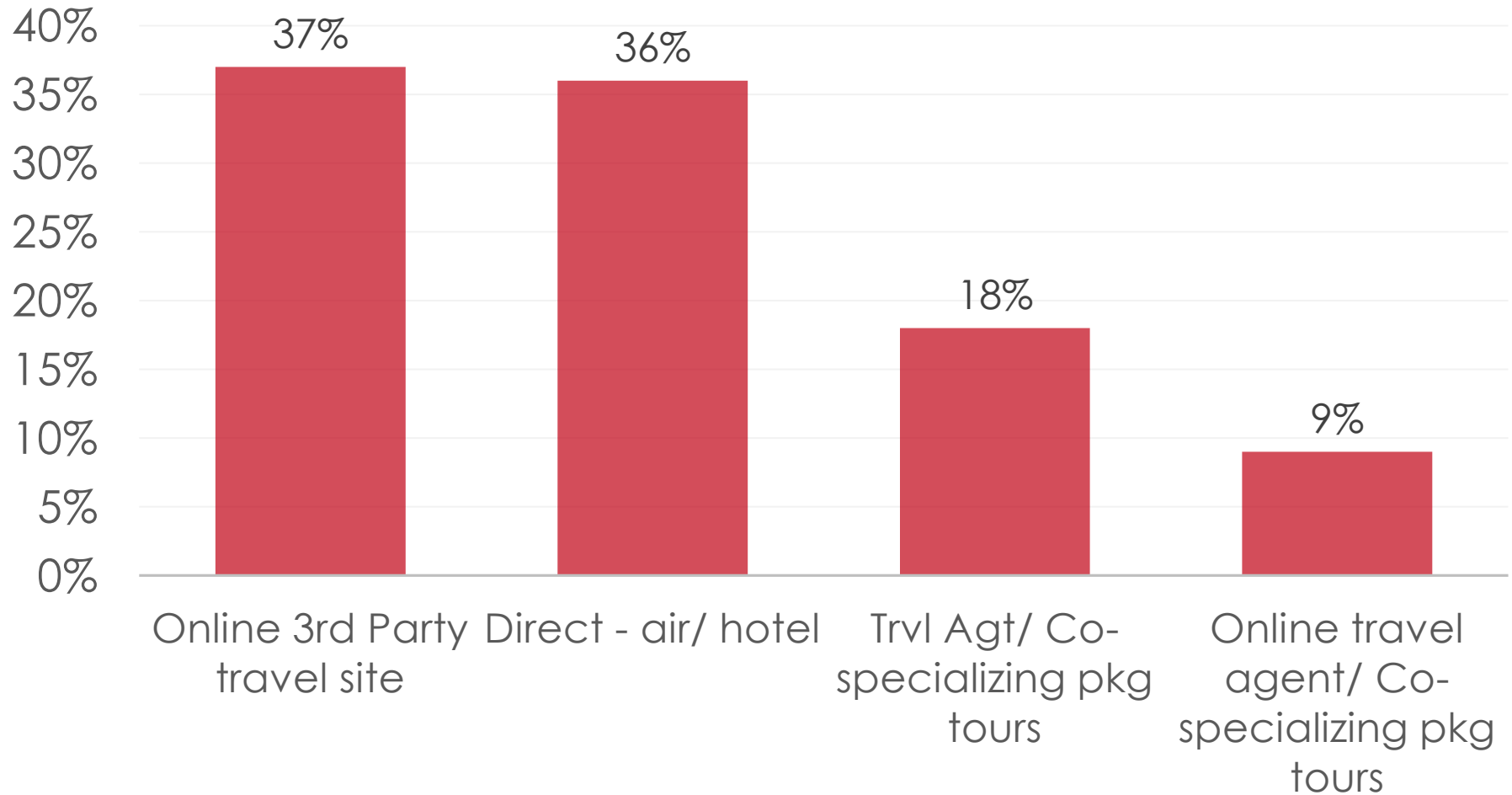
Organized Group Tour



Organized Group Tour



Travel Arrangements

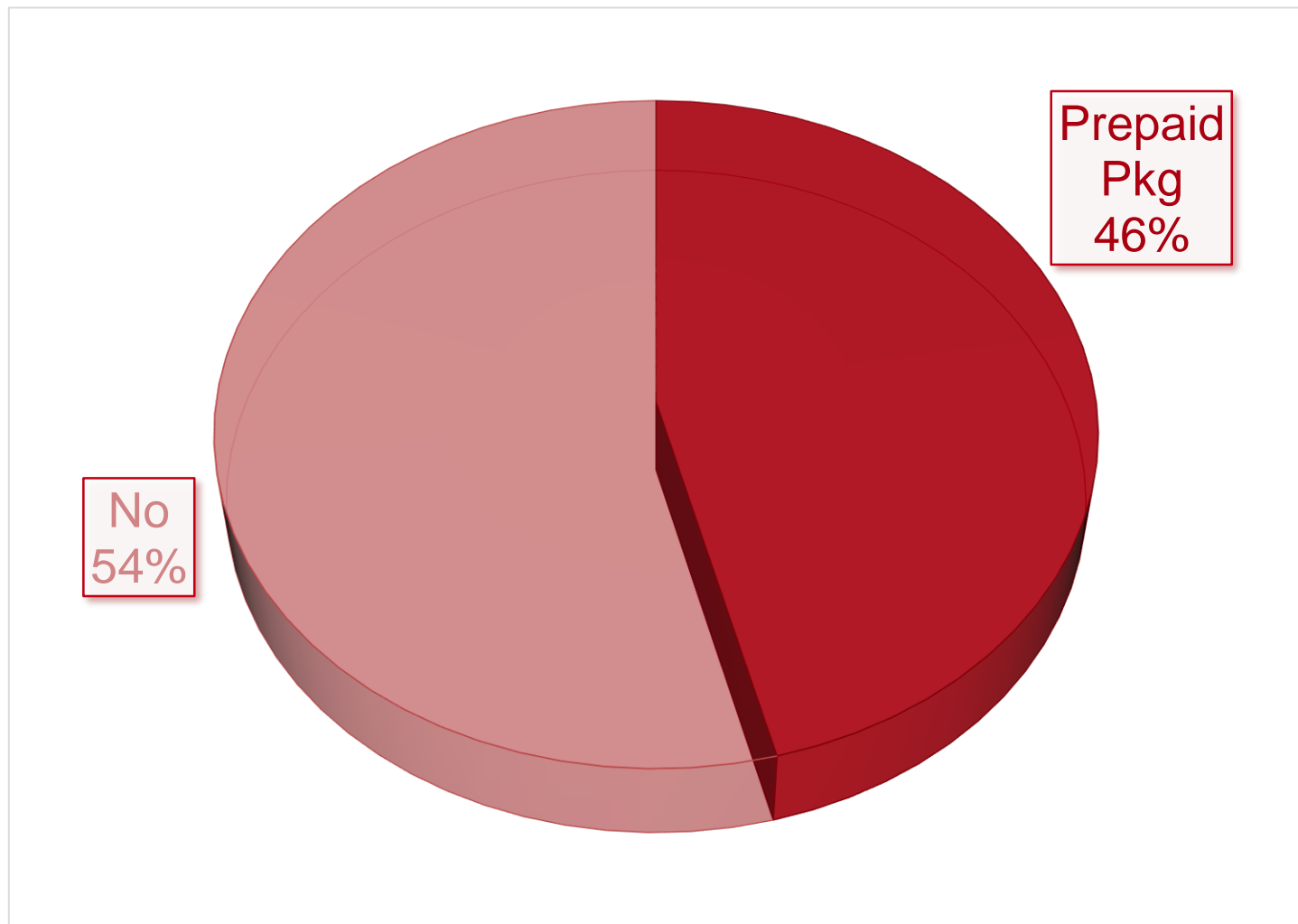


Travel Arrangements

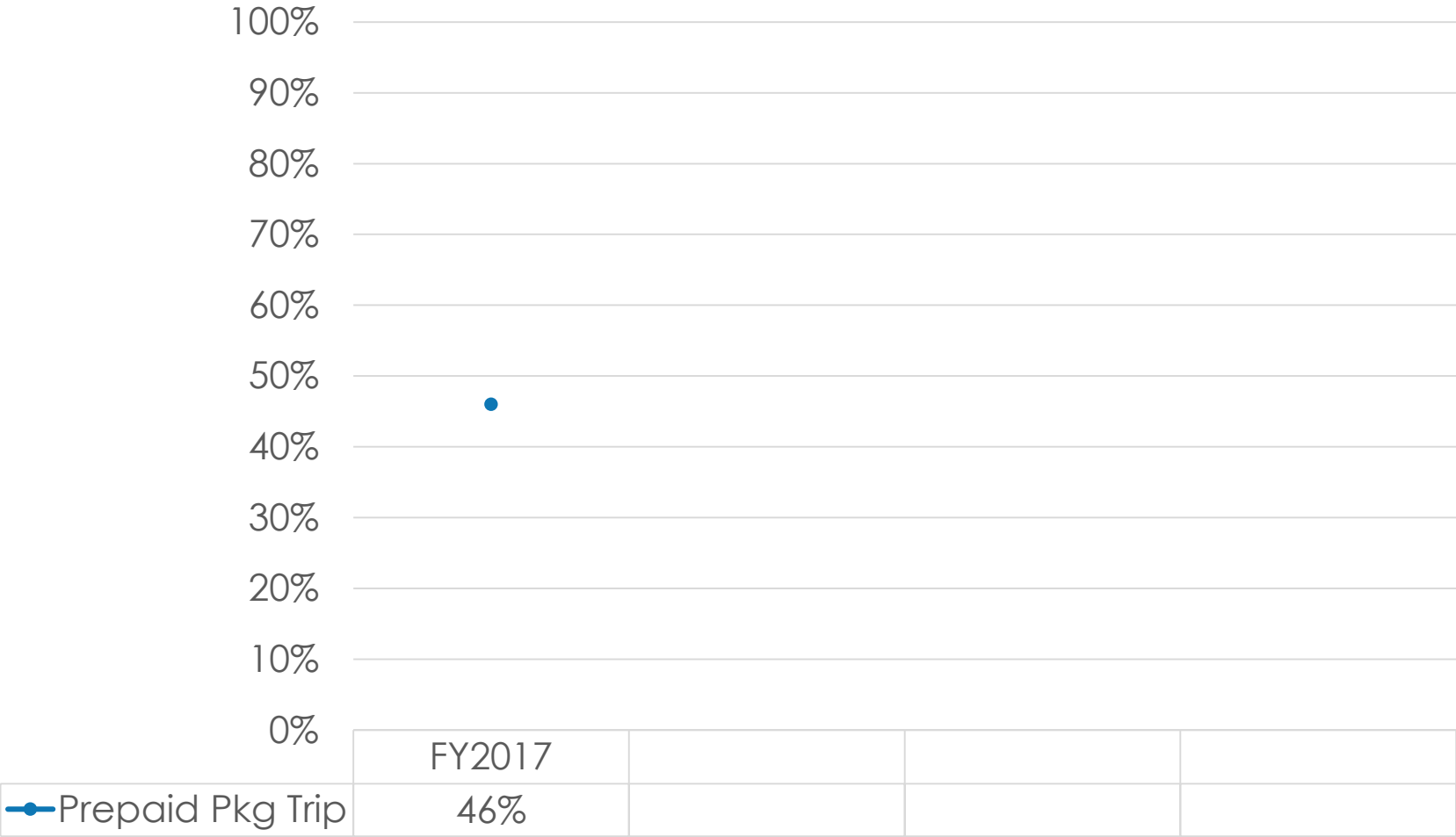


	FY2017			
Online travel agent	9%			
Trvl Agt/ Co- Pkg Tour	18%			
Online 3rd Party	37%			
Direct Air/ Hotel	36%			

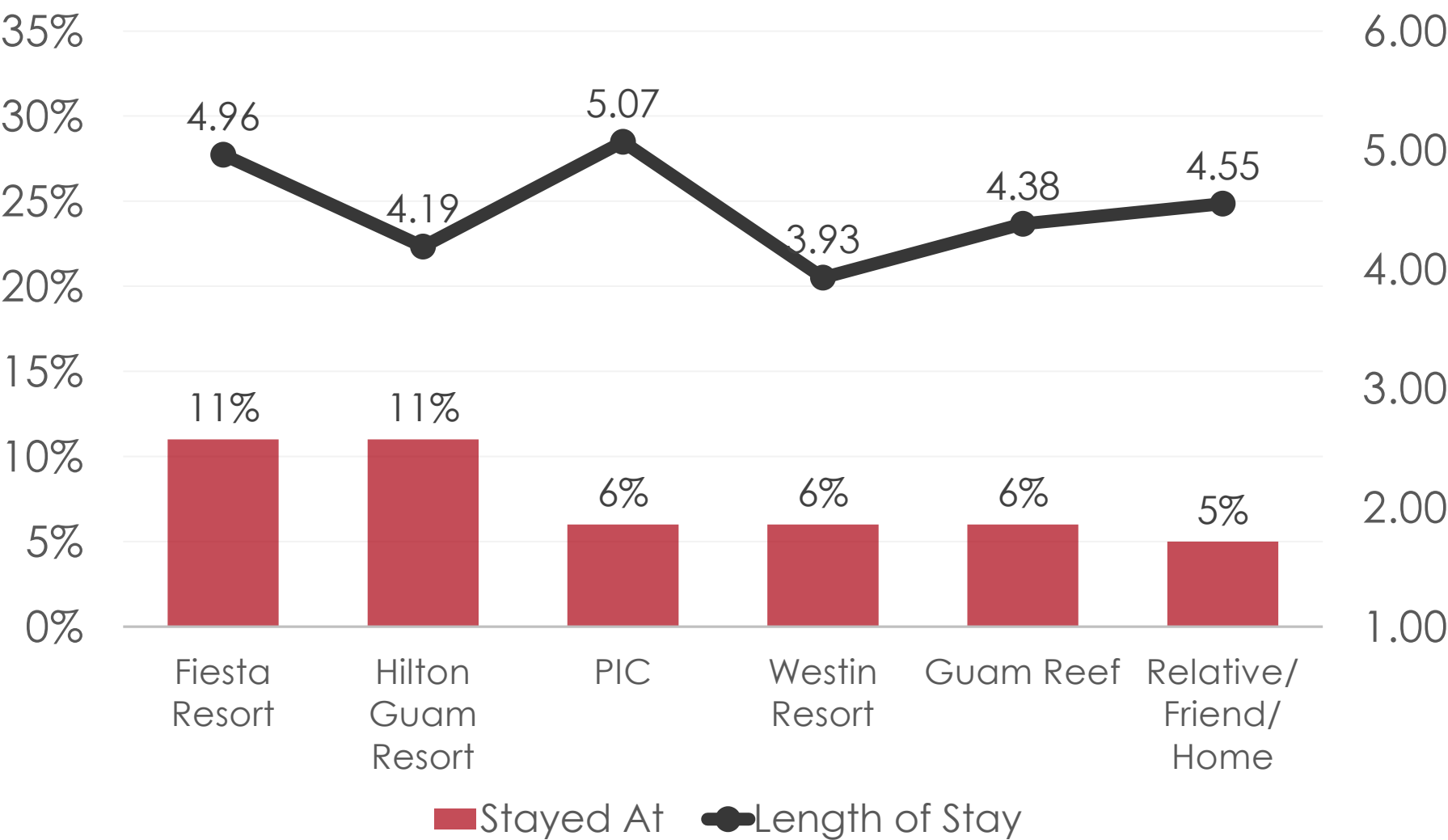
Prepaid Pkg Trip



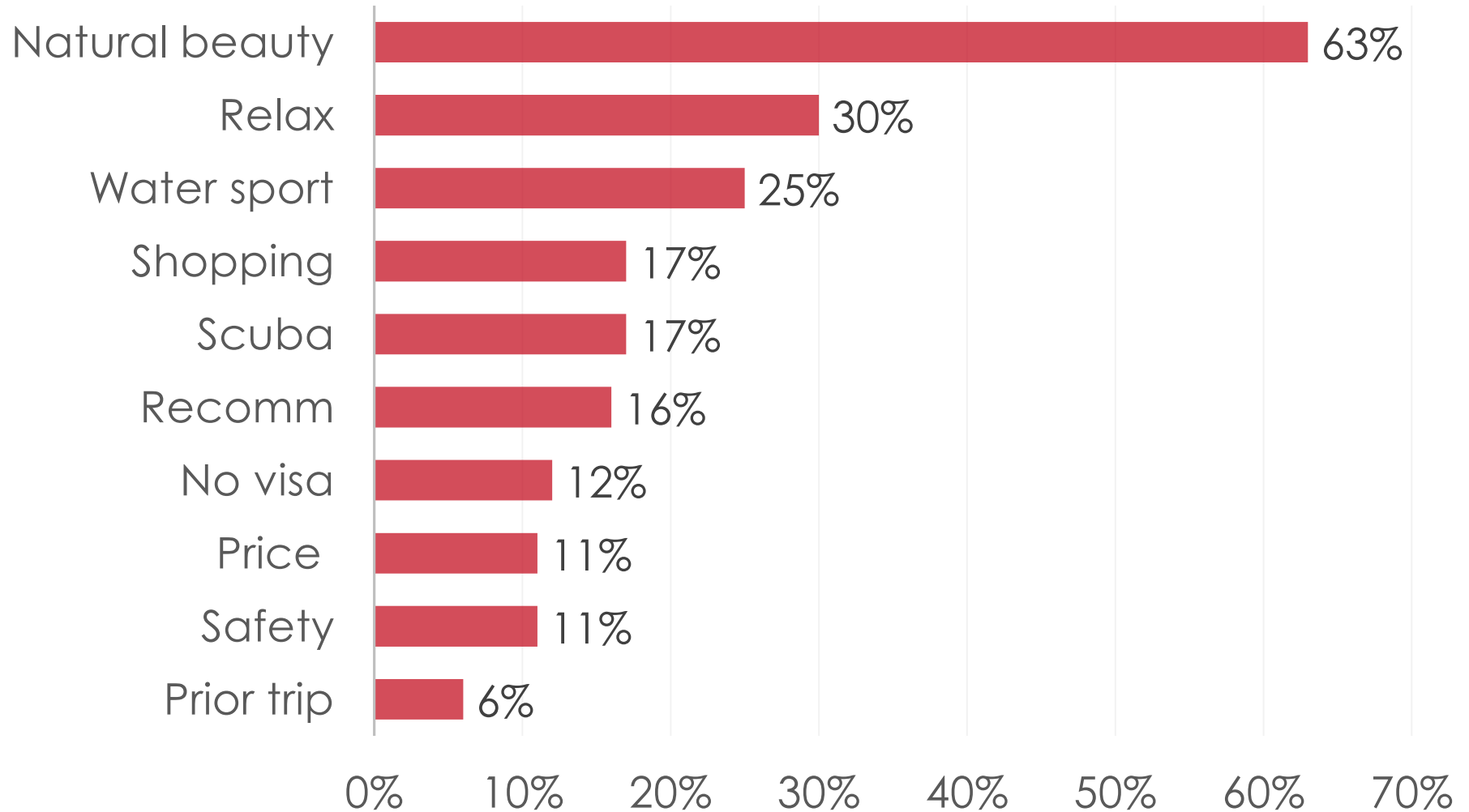
Prepaid Pkg Trip



Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Top 3

FY2017
63% Natural beauty 30% Relax 25% Water sports

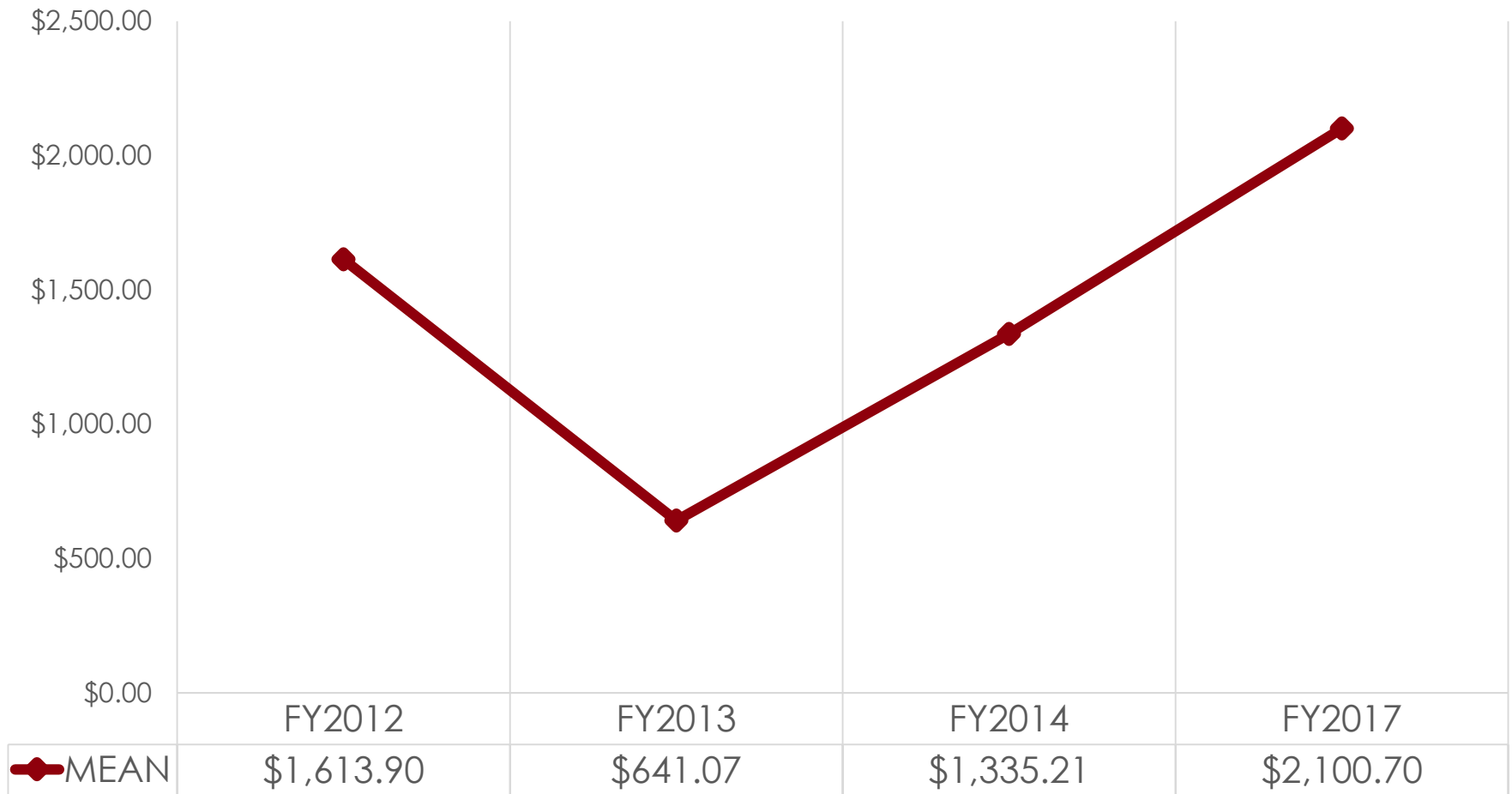
SECTION 3

EXPENDITURES

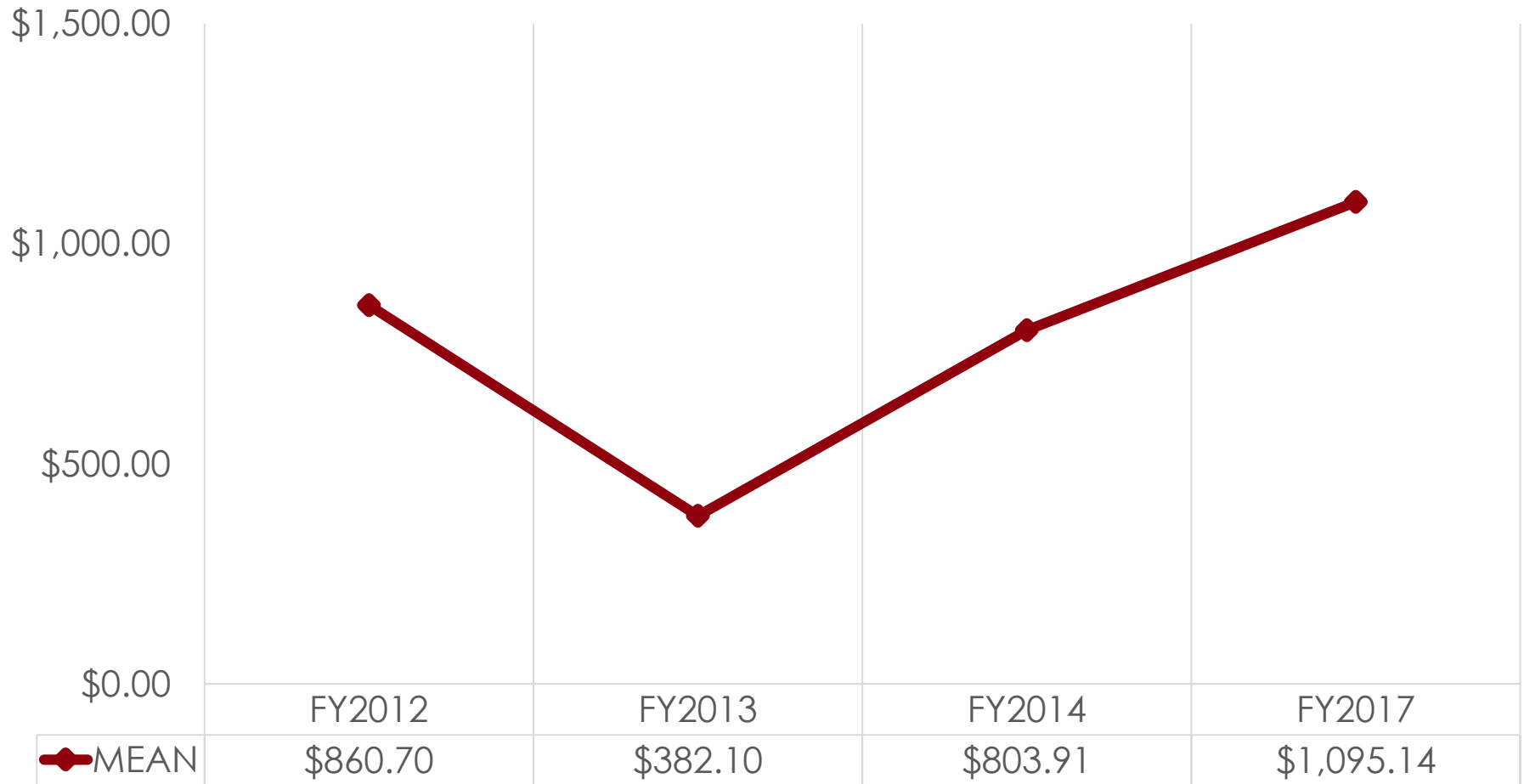
Prepaid Expenditures

- \$2,100.70 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$1,095.14 = overall mean average per person prepaid expenditures

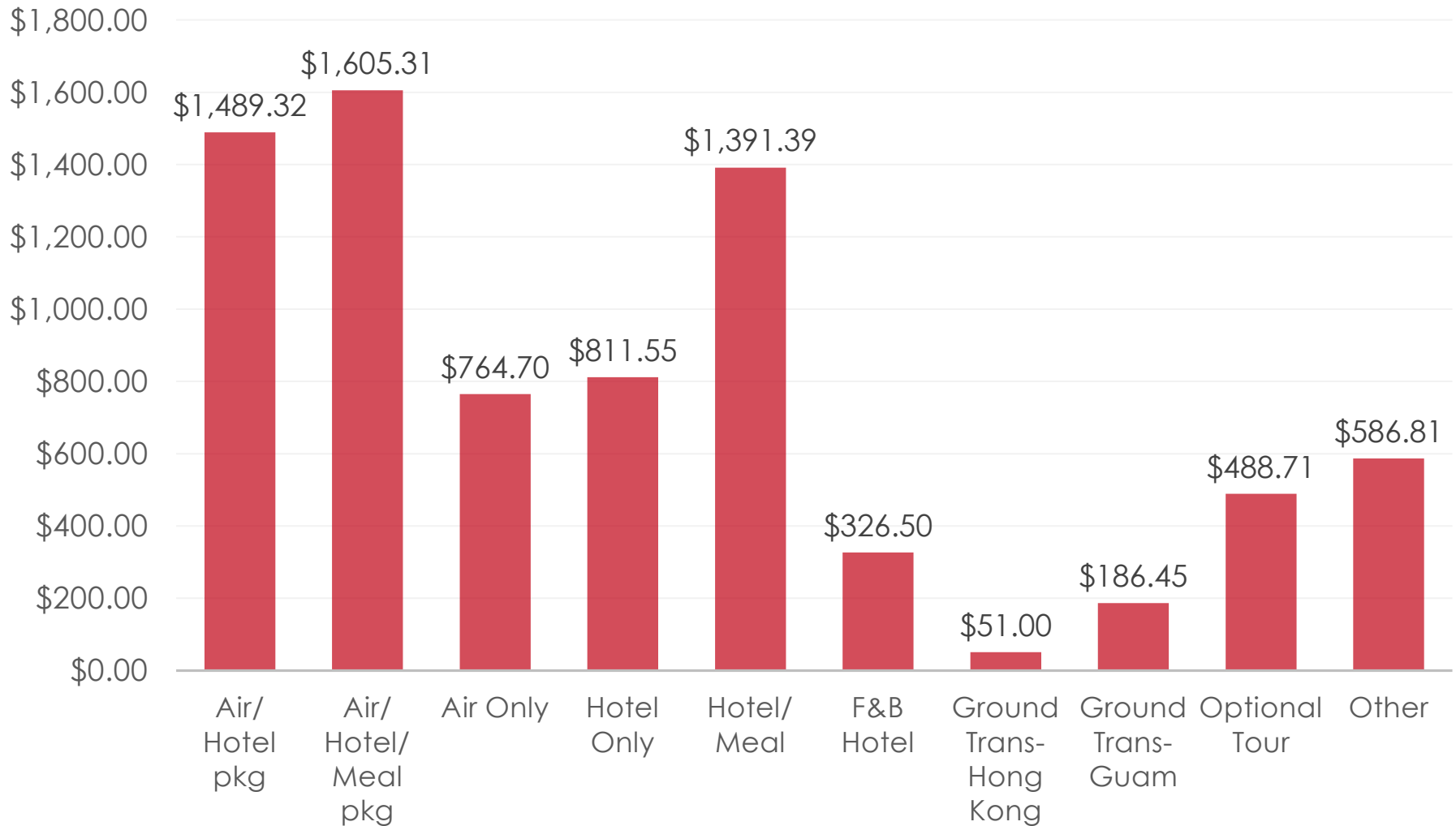
Prepaid Entire Travel Party – Tracking



Prepaid Per Person – Tracking

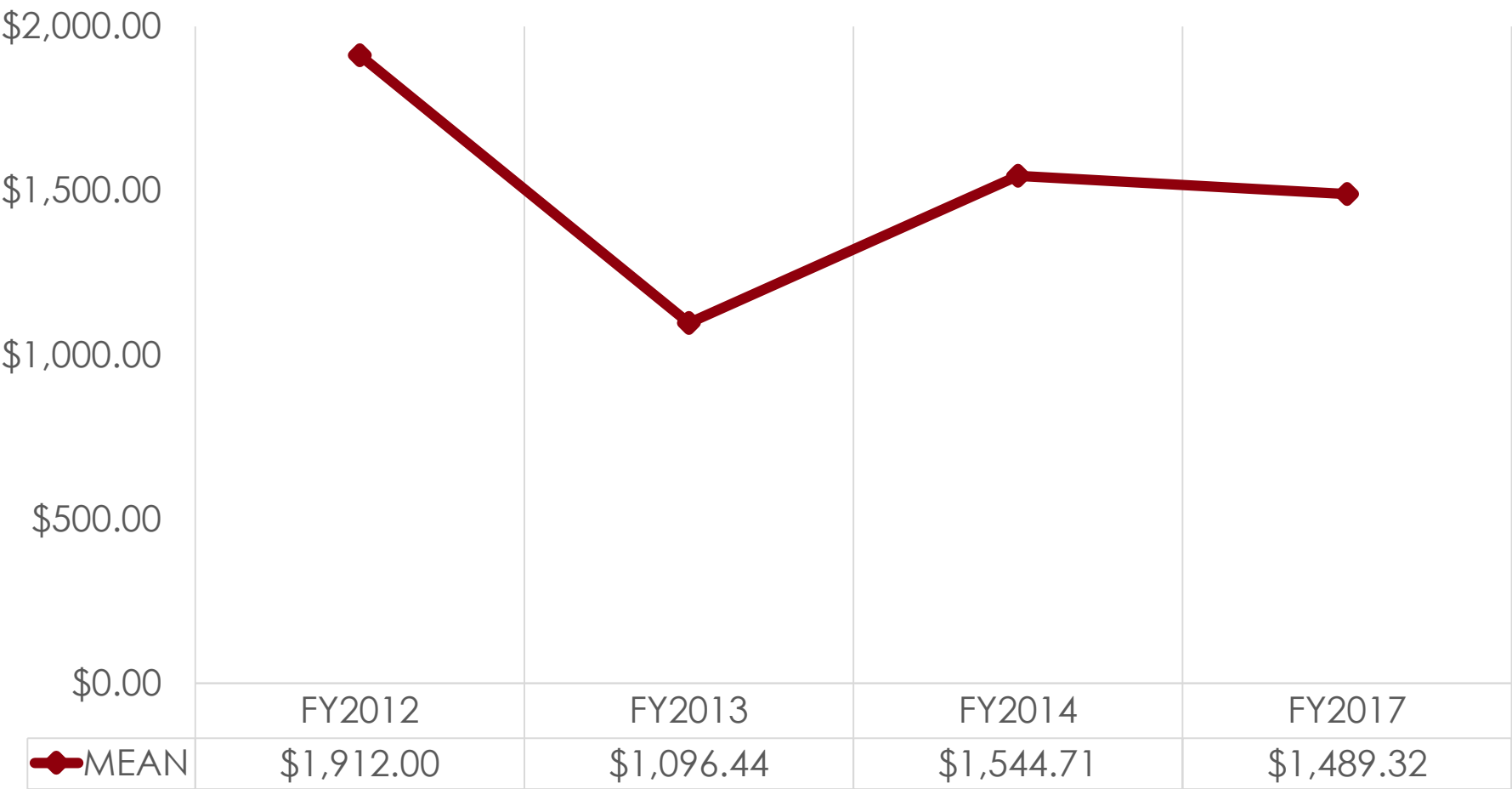


Prepaid Expenses by Category – Mean Entire Travel Party



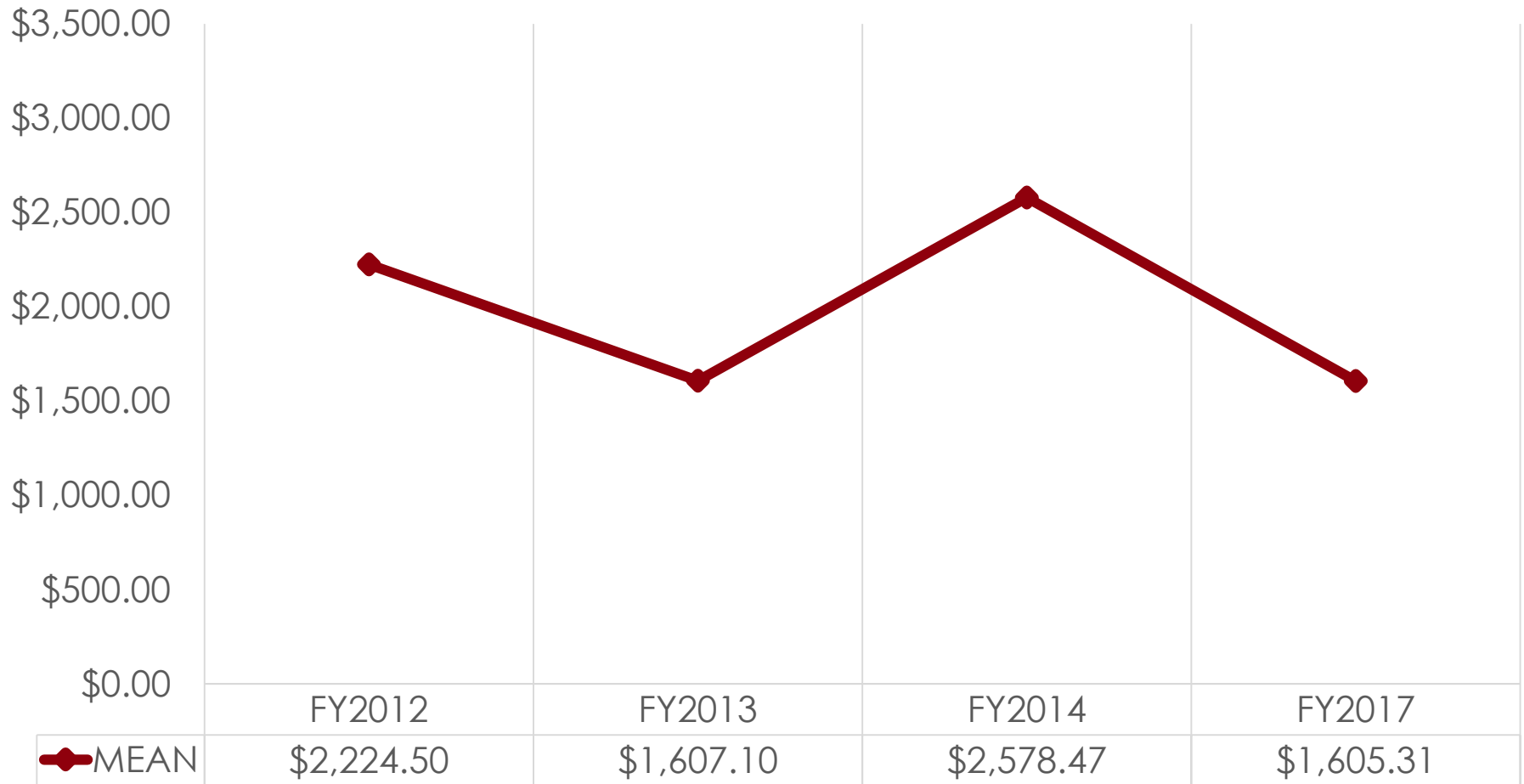
Prepaid – Tracking

Airfare & Accommodation Packages

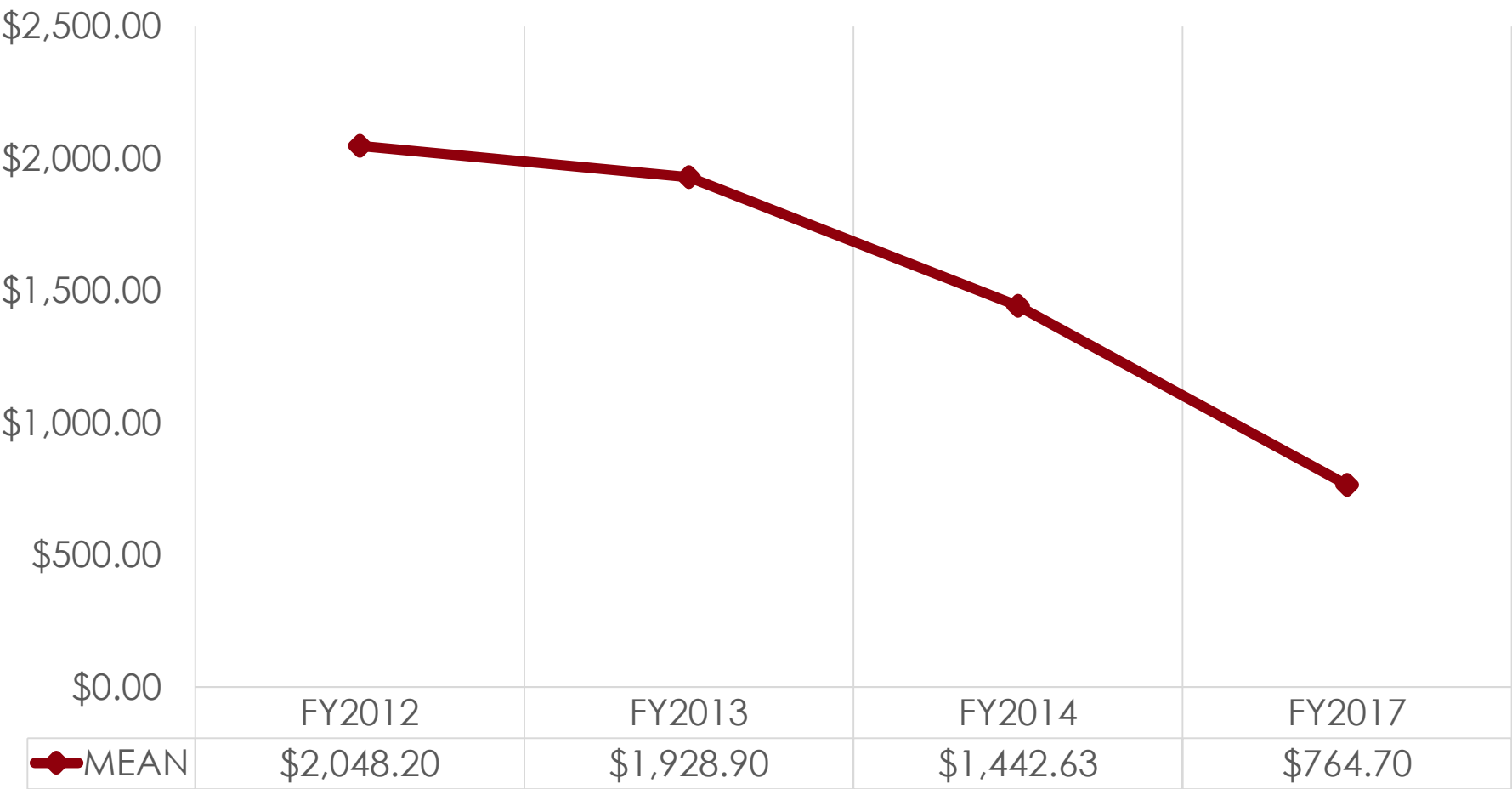


Prepaid – Tracking

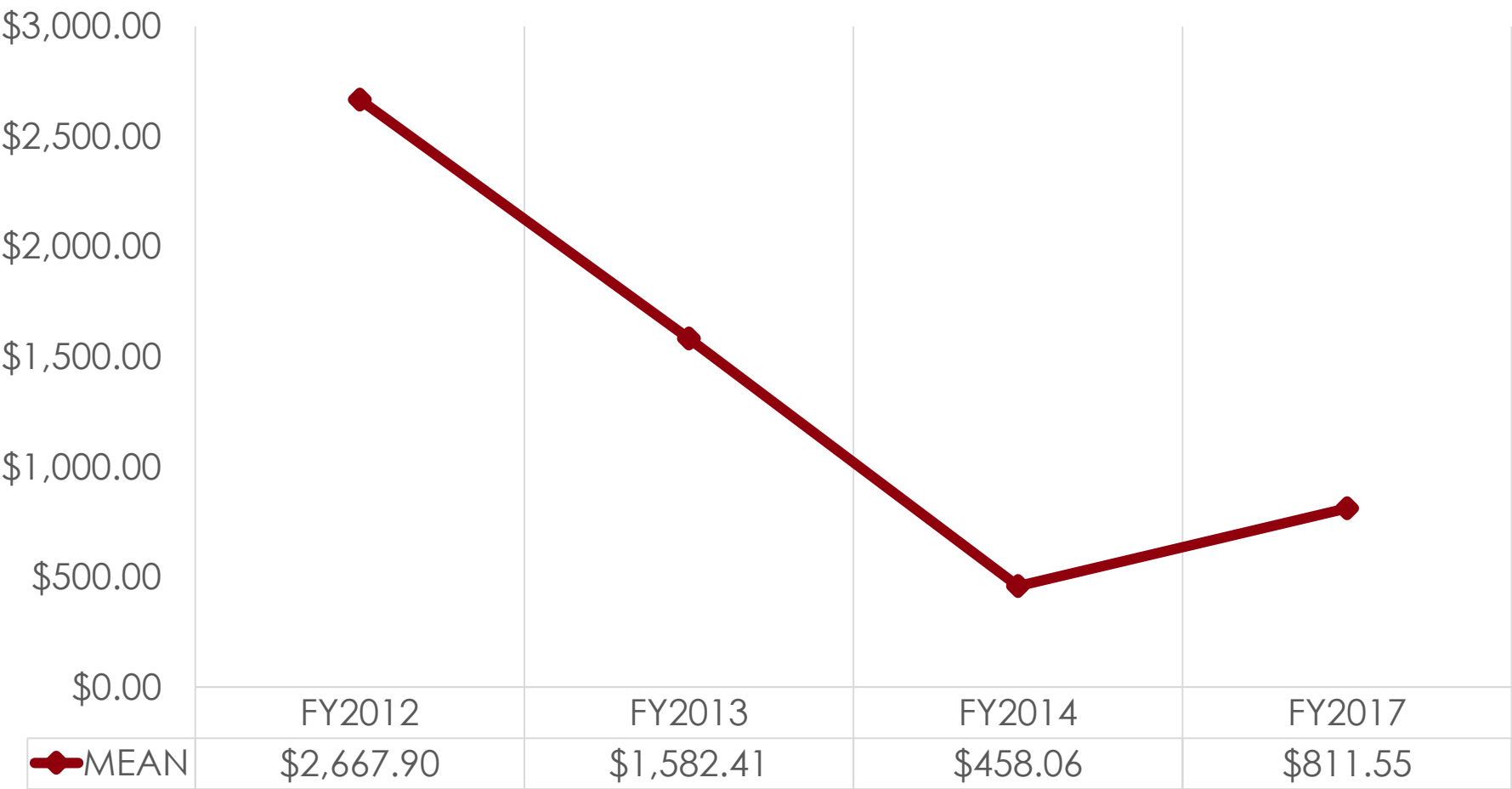
Airfare & Accommodation W/ Meal Packages



Prepaid – Tracking Airfare Only

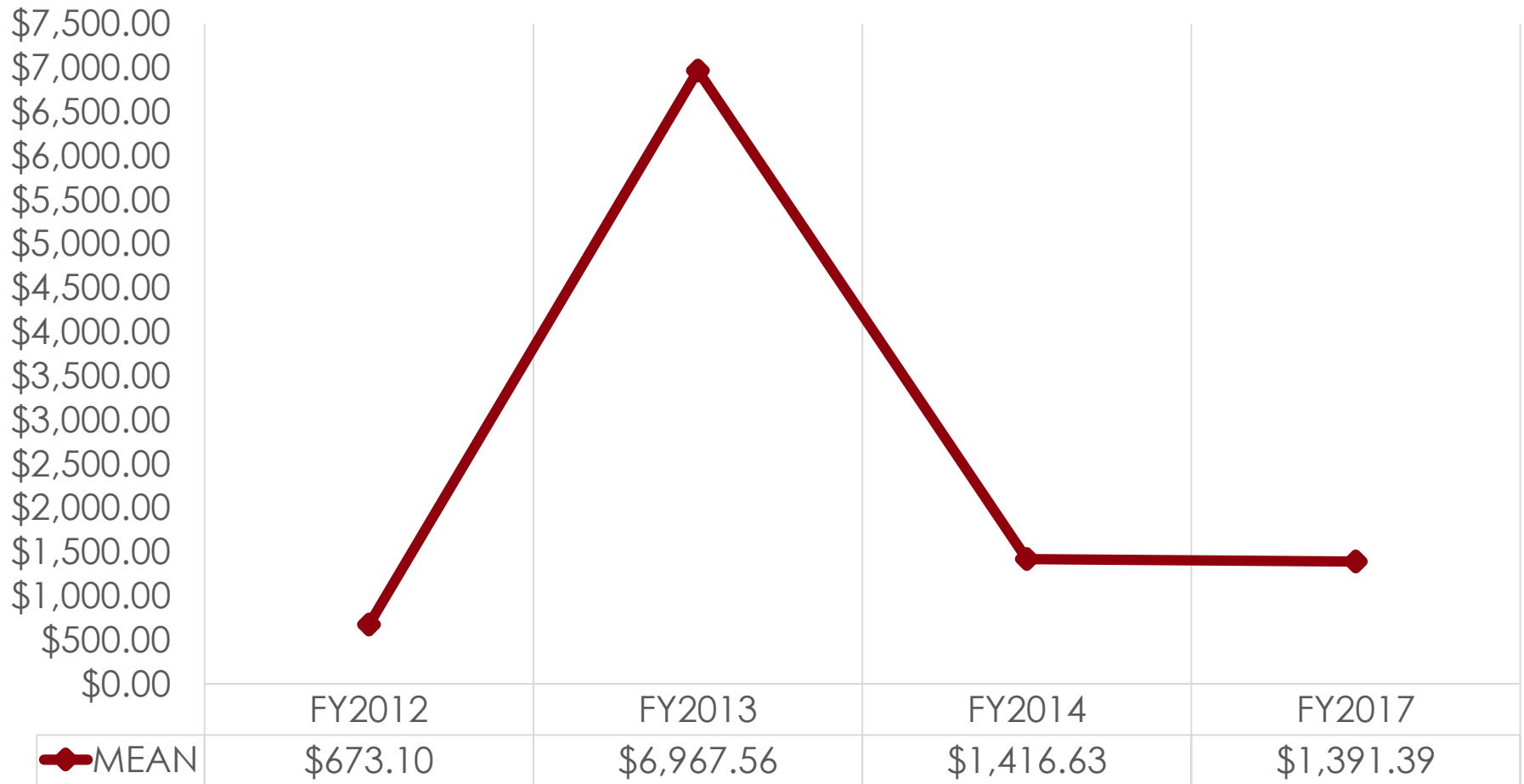


Prepaid – Tracking Accommodations Only

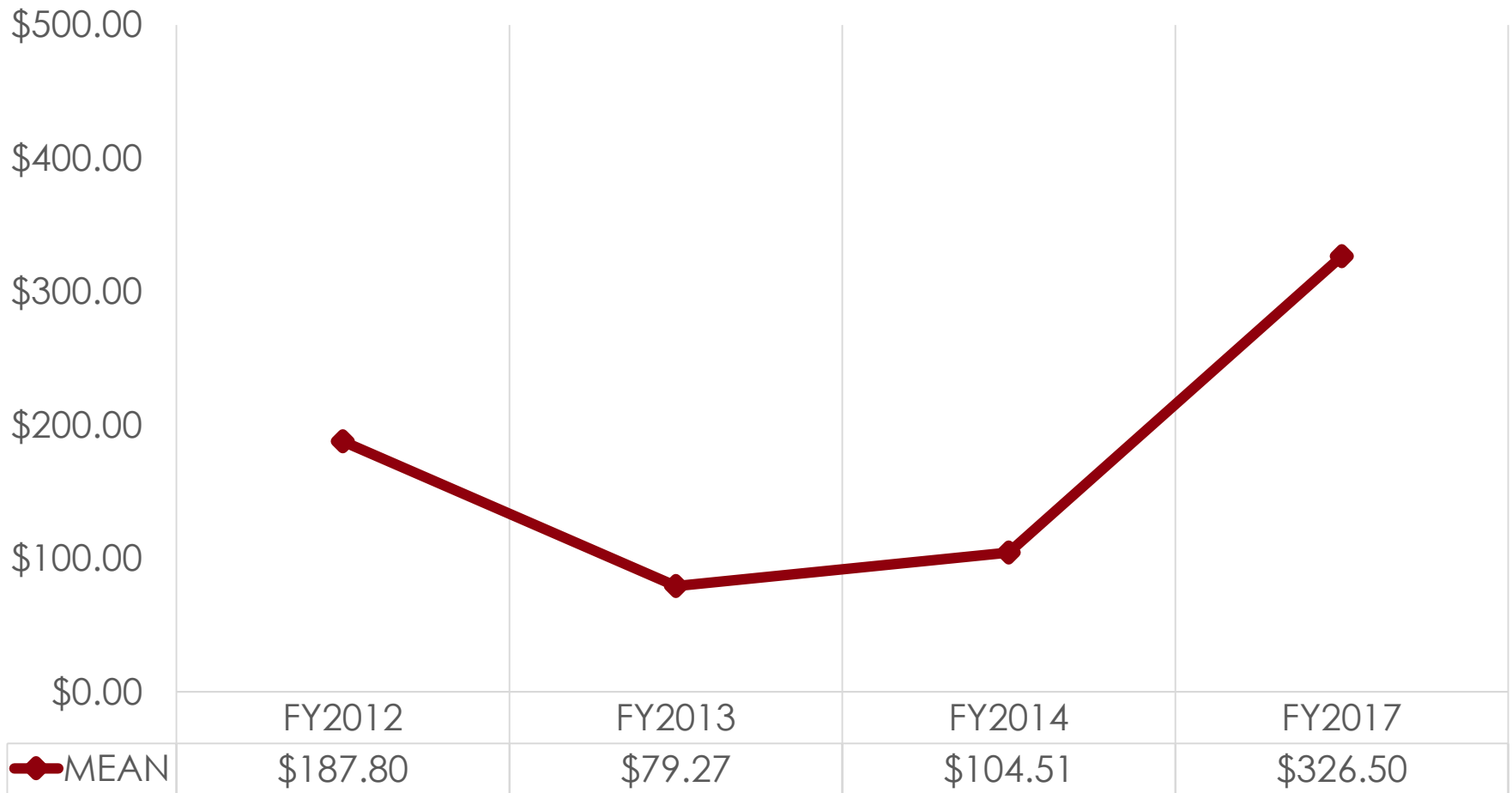


Prepaid – Tracking

Accommodations w/ Meal Only

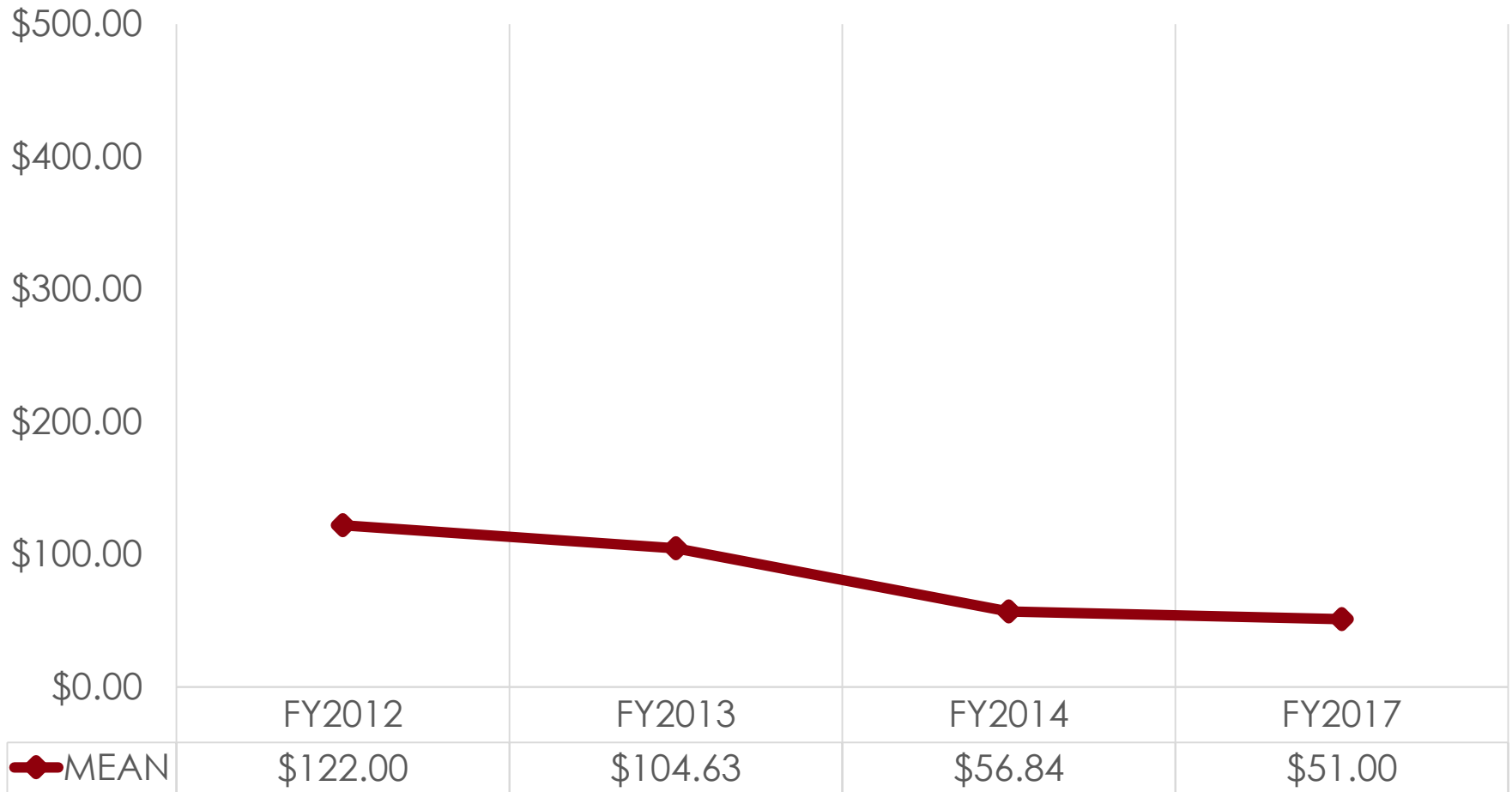


Prepaid – Tracking Food & Beverage in Hotel



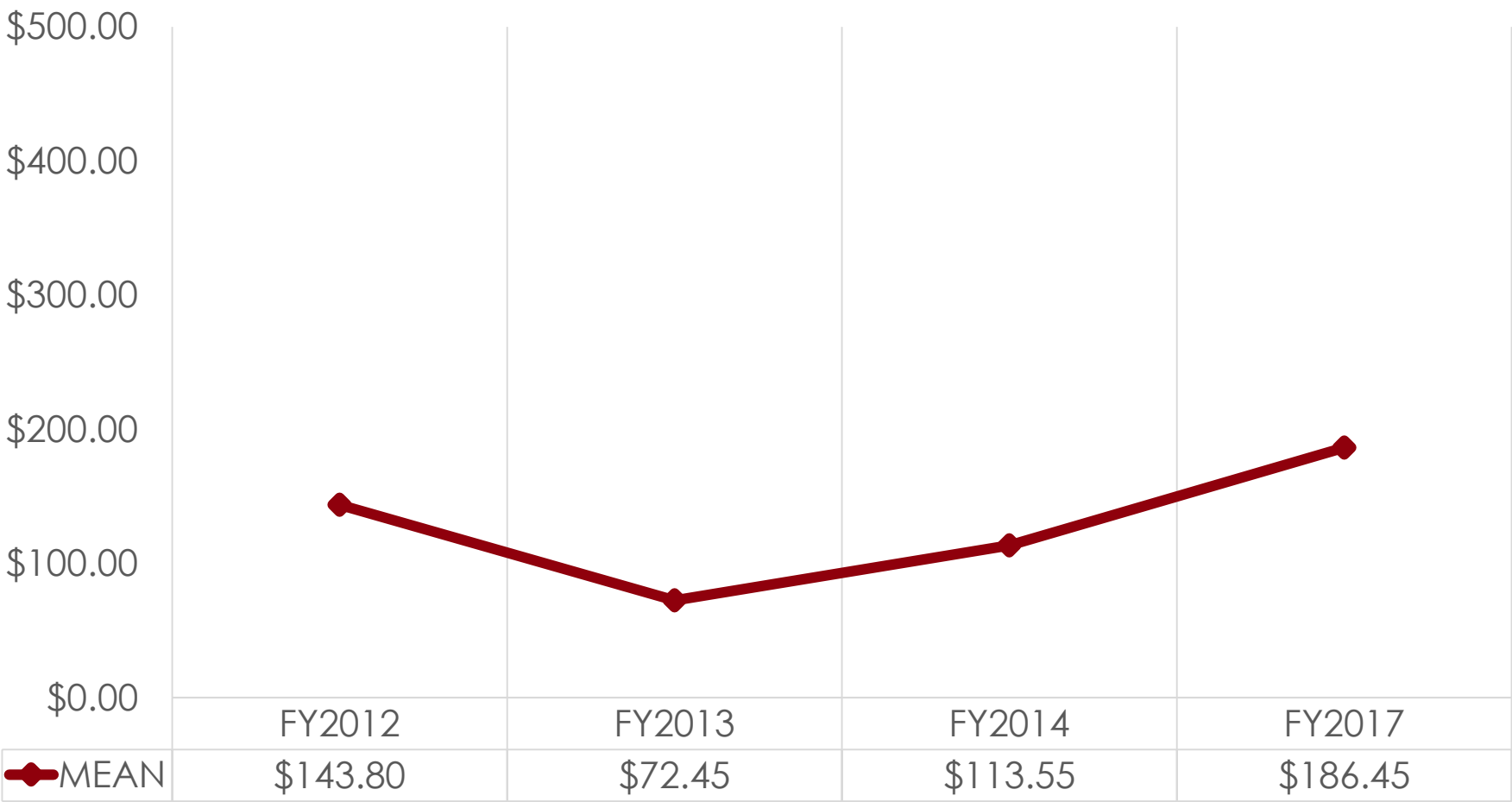
Prepaid – Tracking

Ground Transportation - Hong Kong



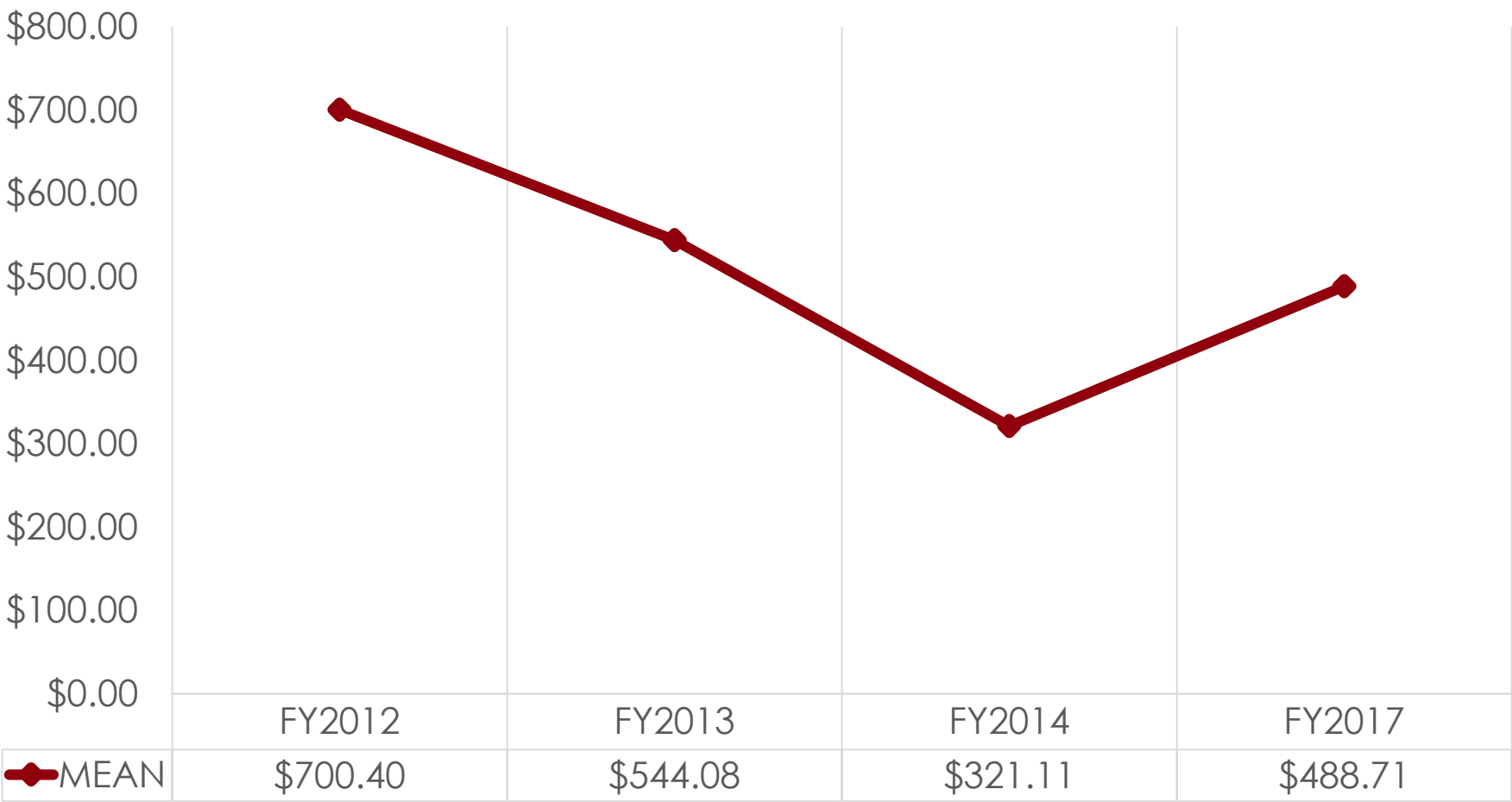
Prepaid – Tracking

Ground Transportation - Guam



Prepaid – Tracking

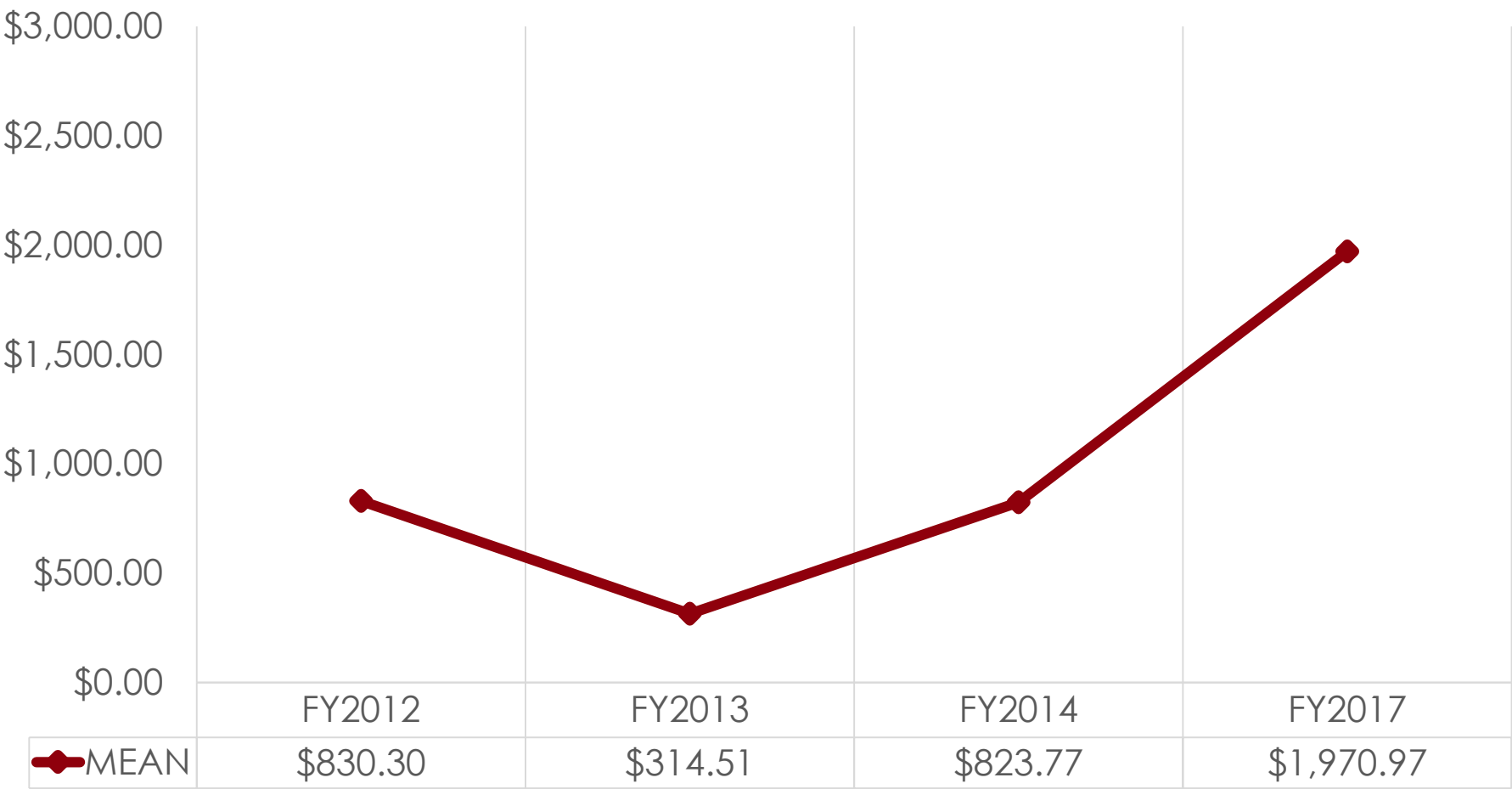
Optional tours/ Activities



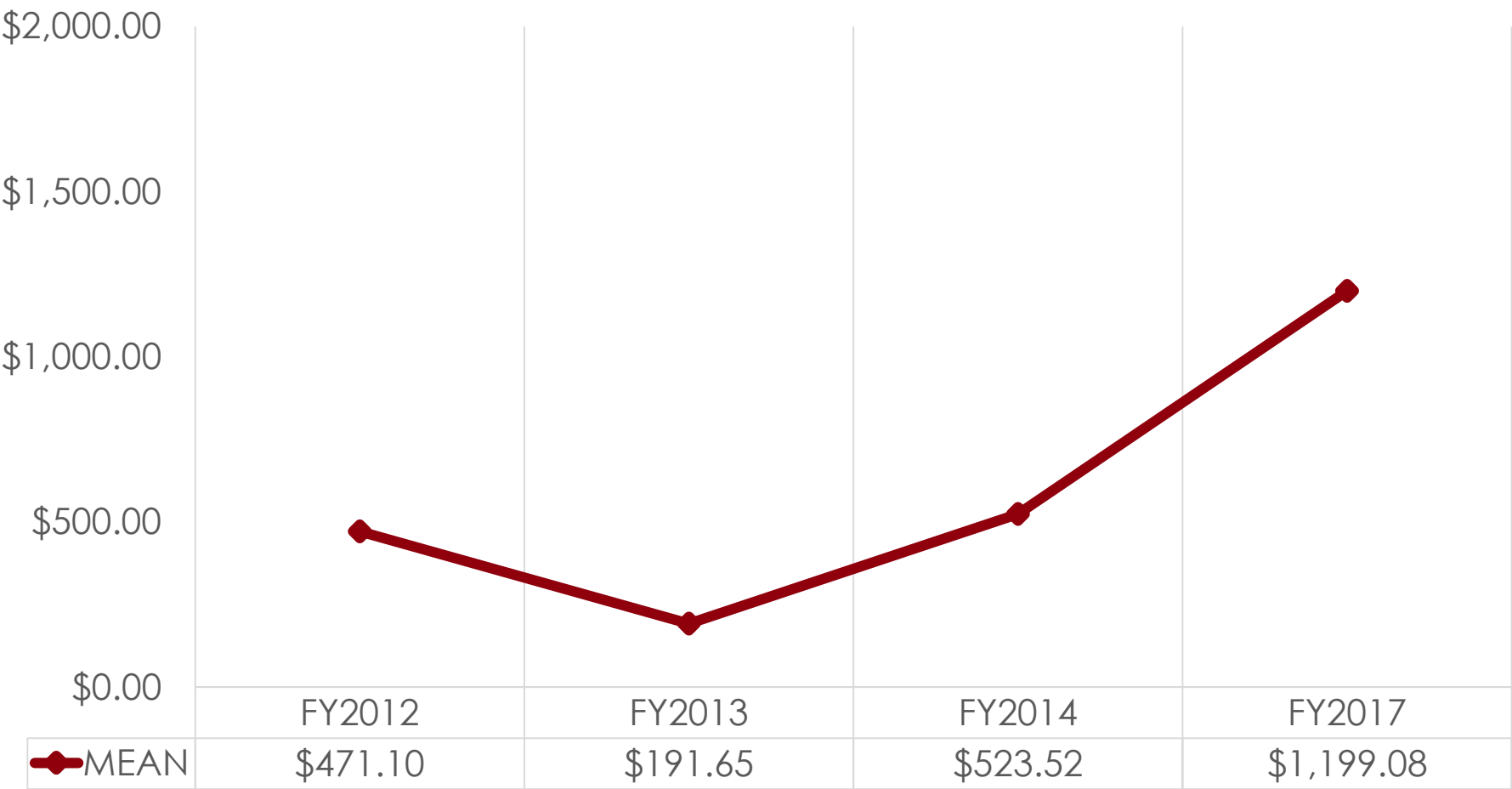
On-Island Expenditures

- \$1,970.97 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$1,199.08 = overall mean average per person prepaid expenditures

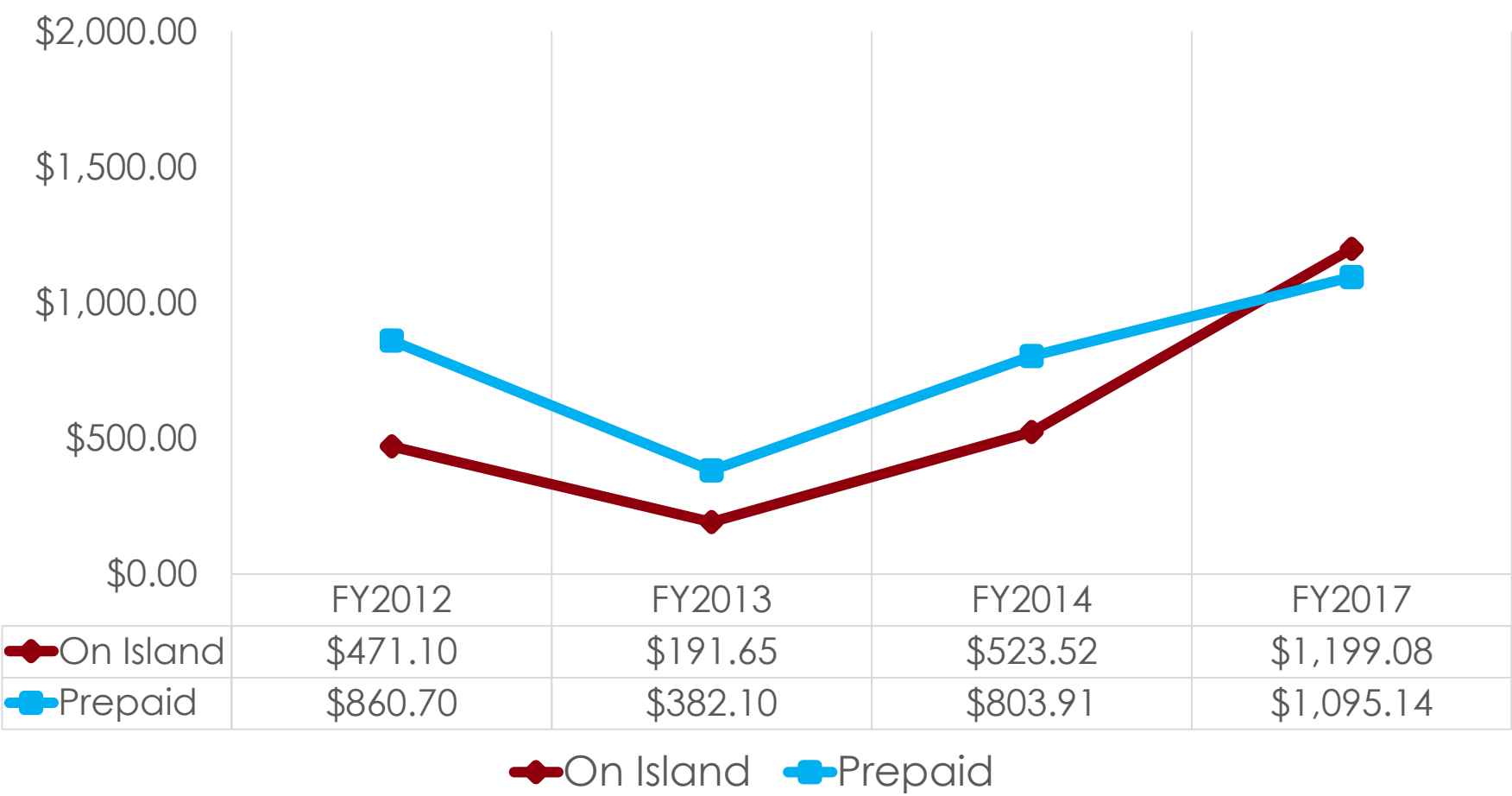
On-Island Entire Travel Party – Tracking



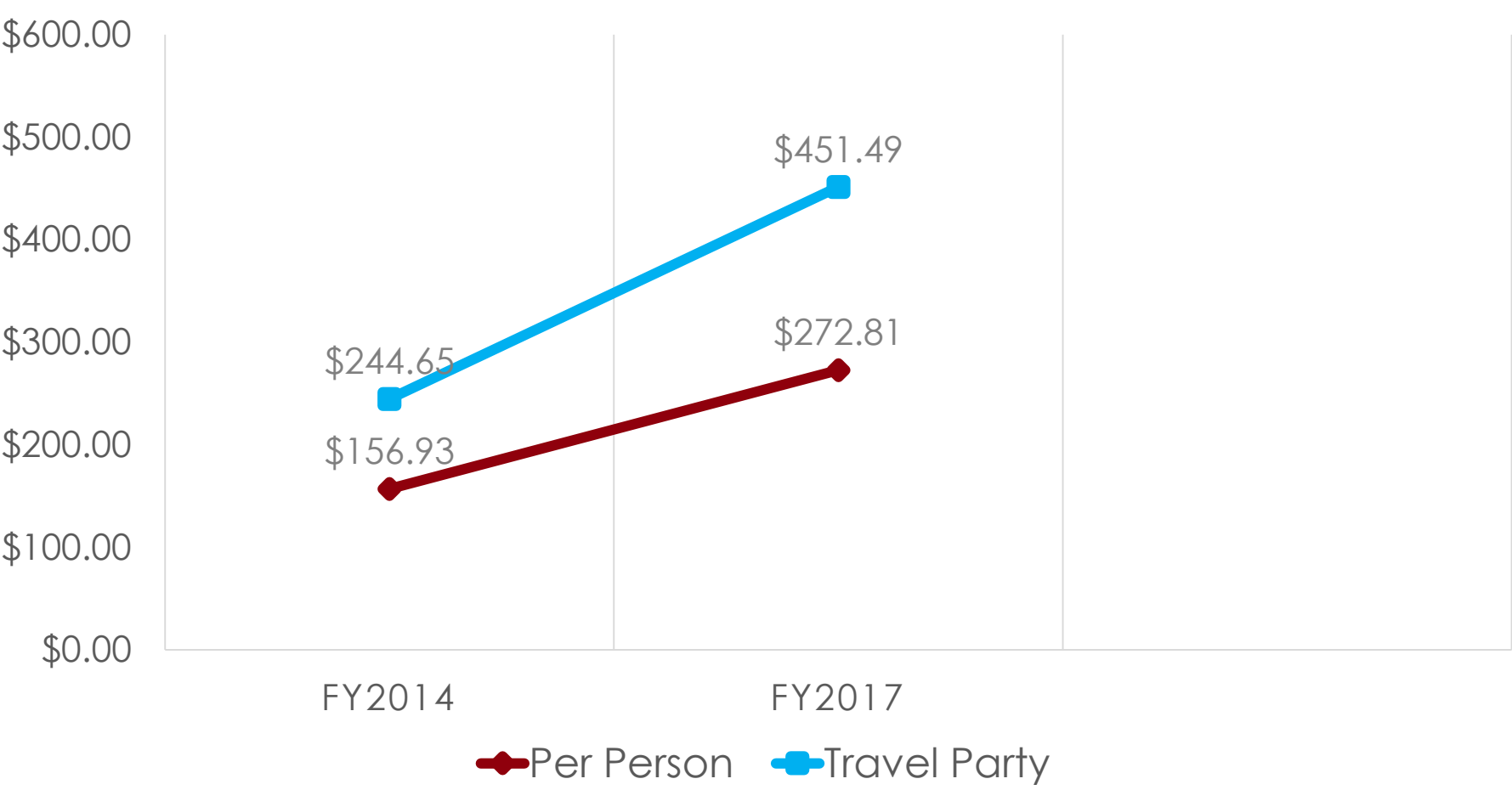
On-Island Per Person – Tracking



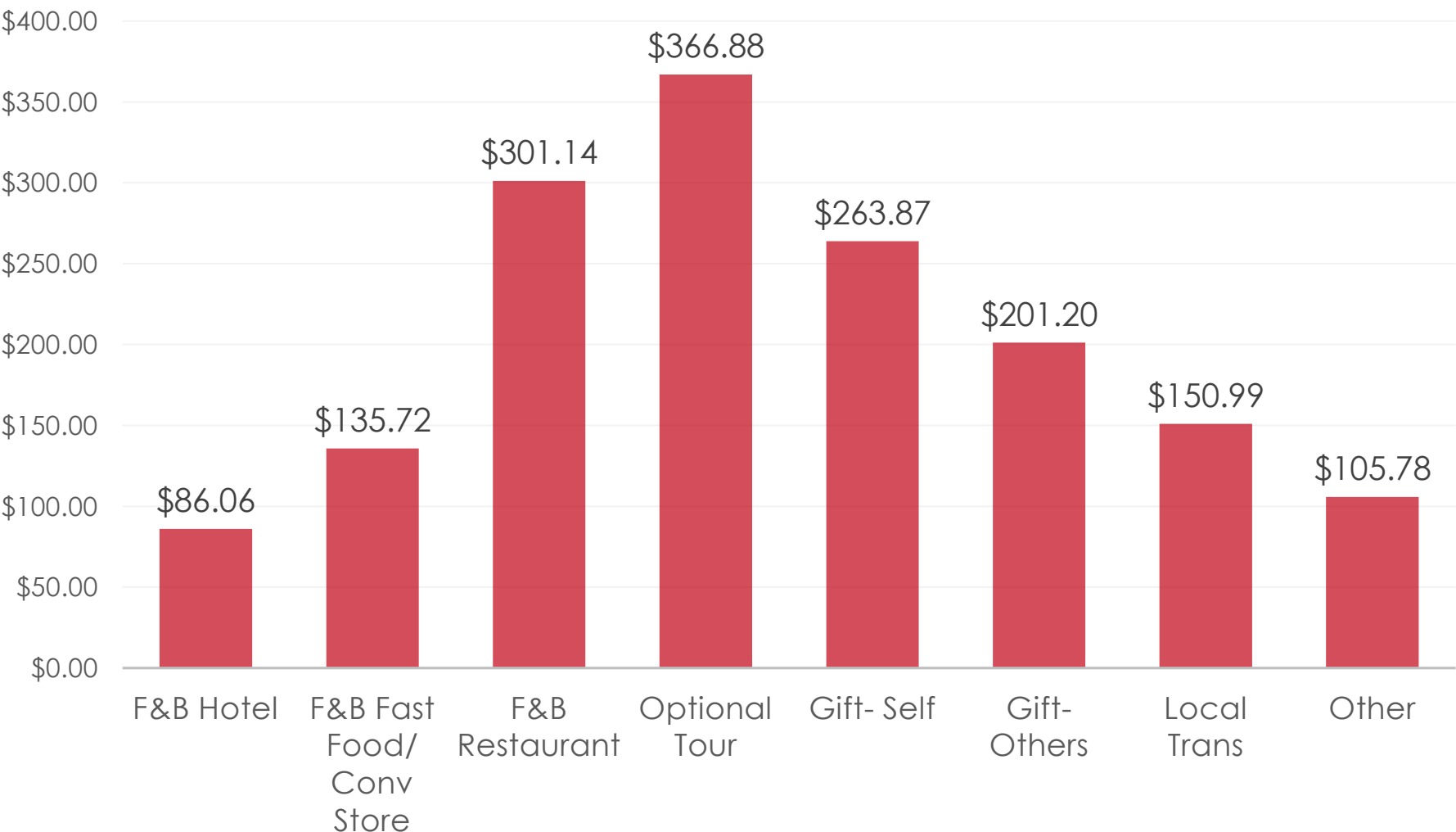
Per Person MEAN expenditures – Tracking On-Island/ Prepaid



On-Island Per Day Spending – Tracking Mean

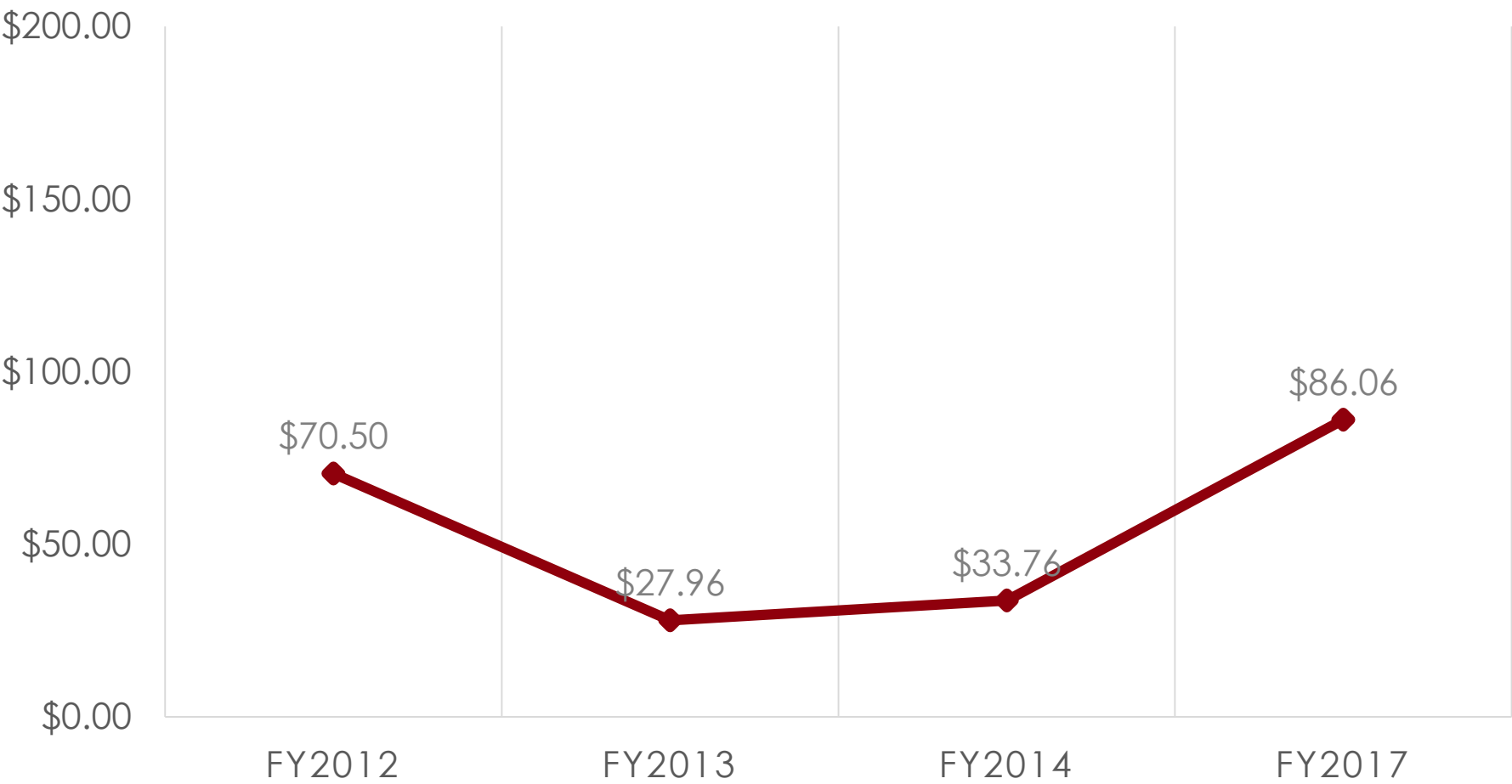


On-Island Expenses by Category – Mean Entire Travel Party



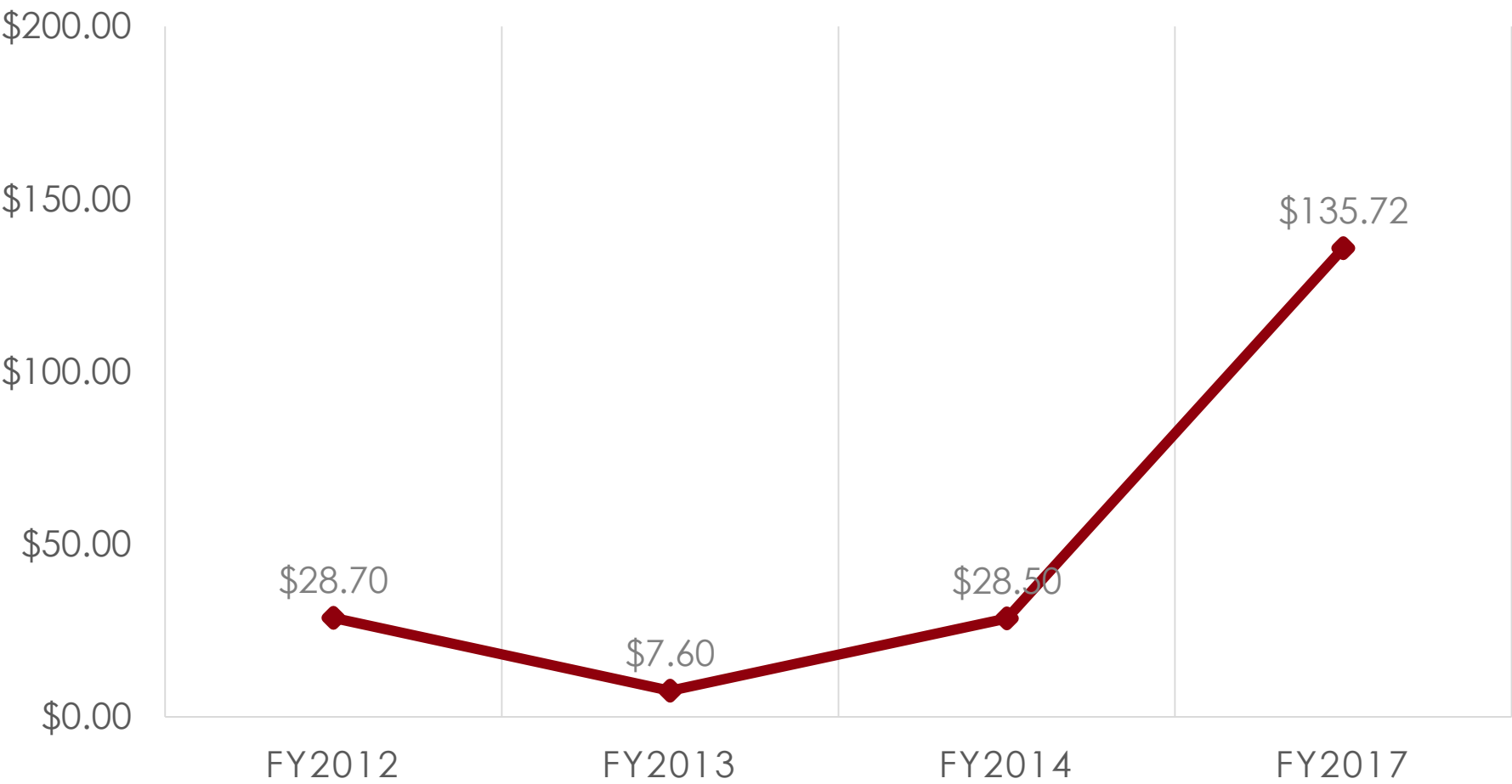
On-Island – Tracking

Food & Beverage - Hotel



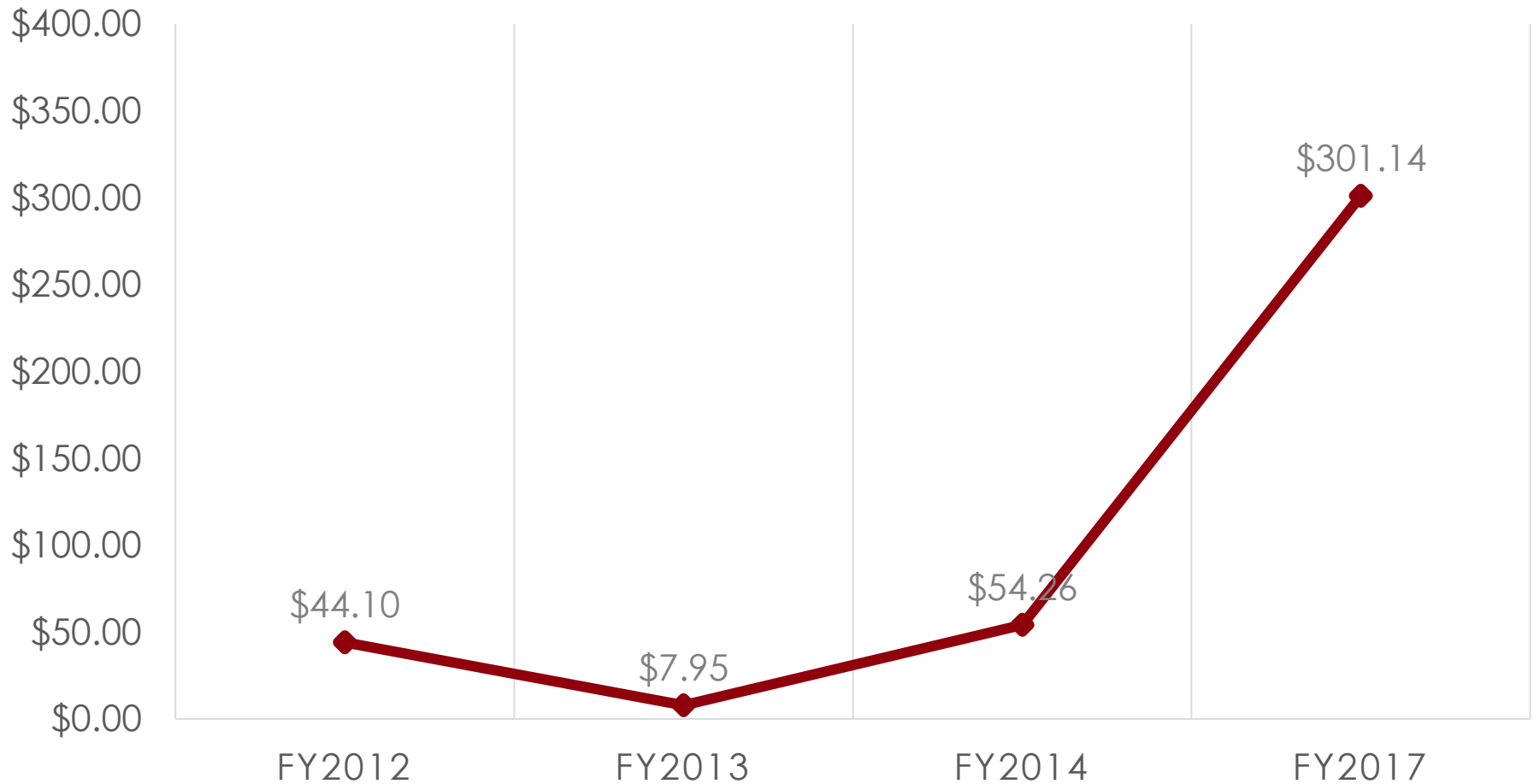
On-Island – Tracking

Food & Beverage – Fast Food/ Convenience Store



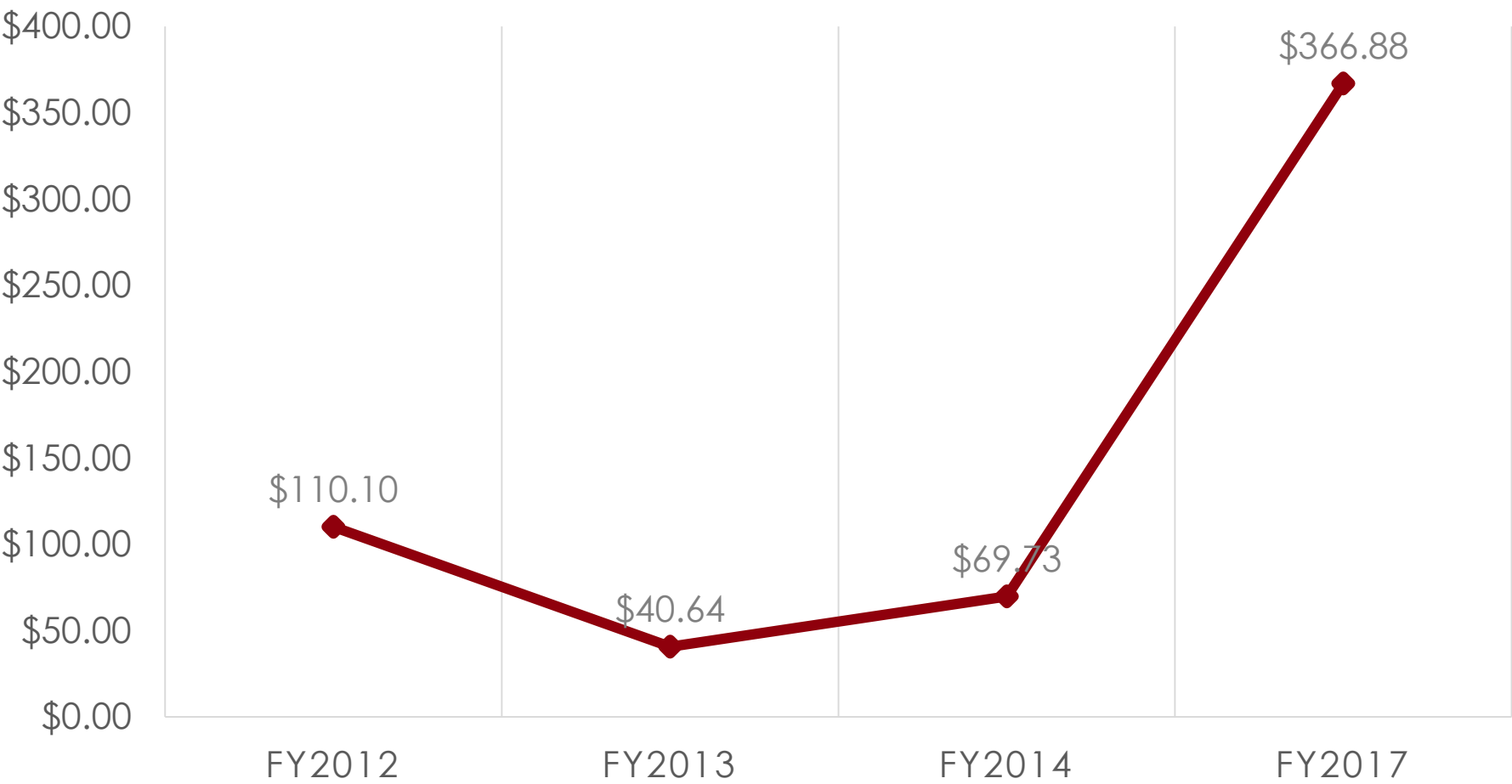
On-Island – Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



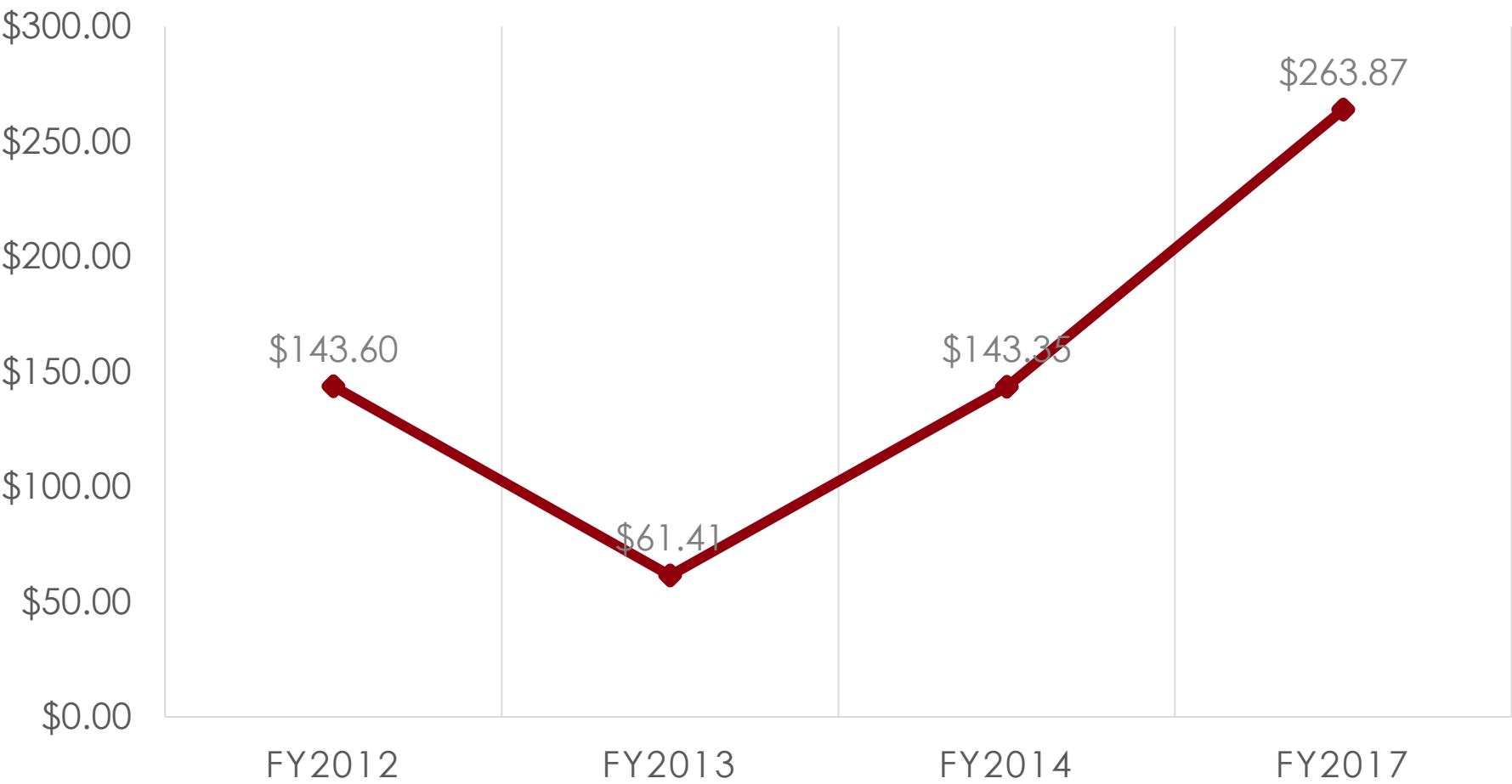
On-Island – Tracking

Optional tour/ Activities



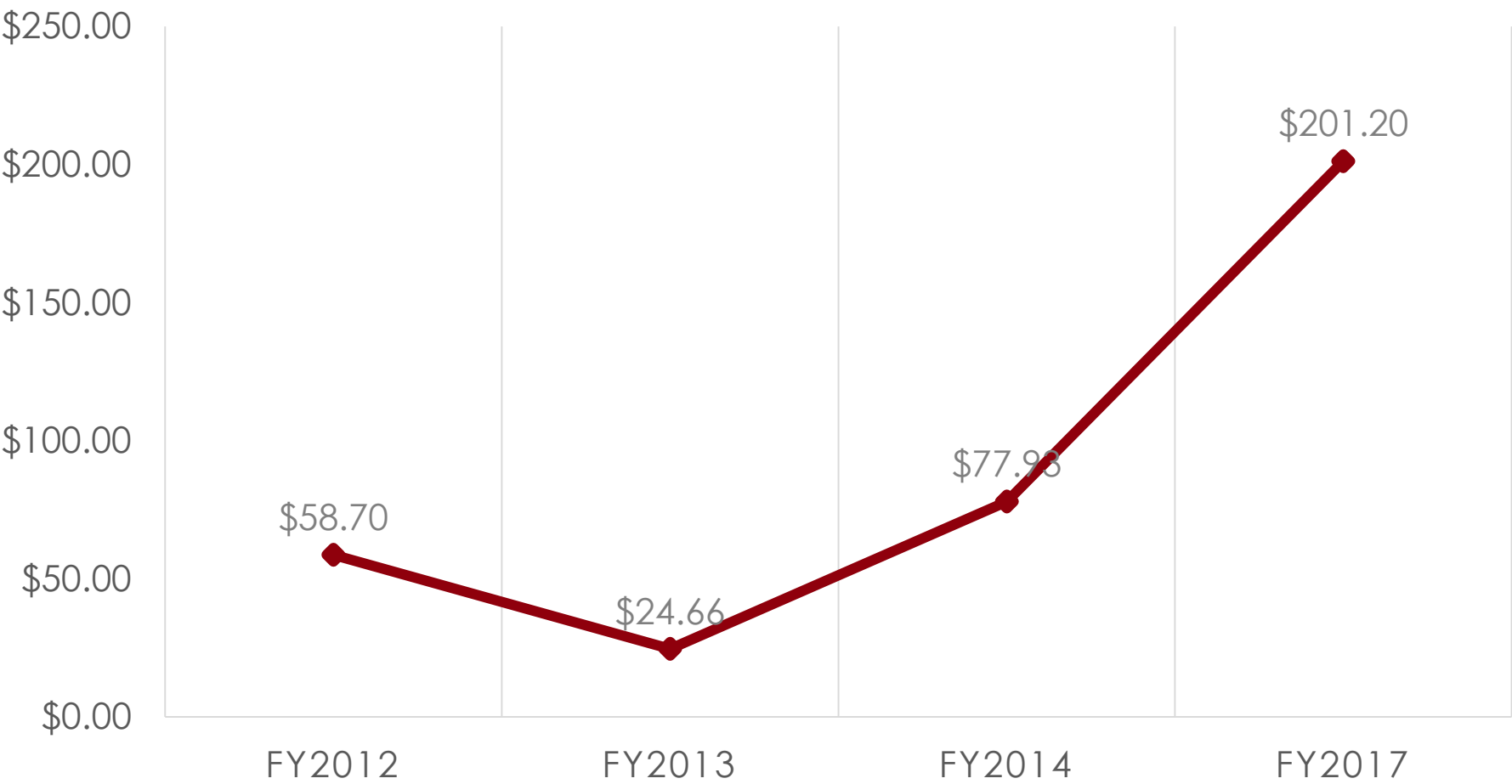
On-Island – Tracking

Gift/ Souvenir – Self/ Companion

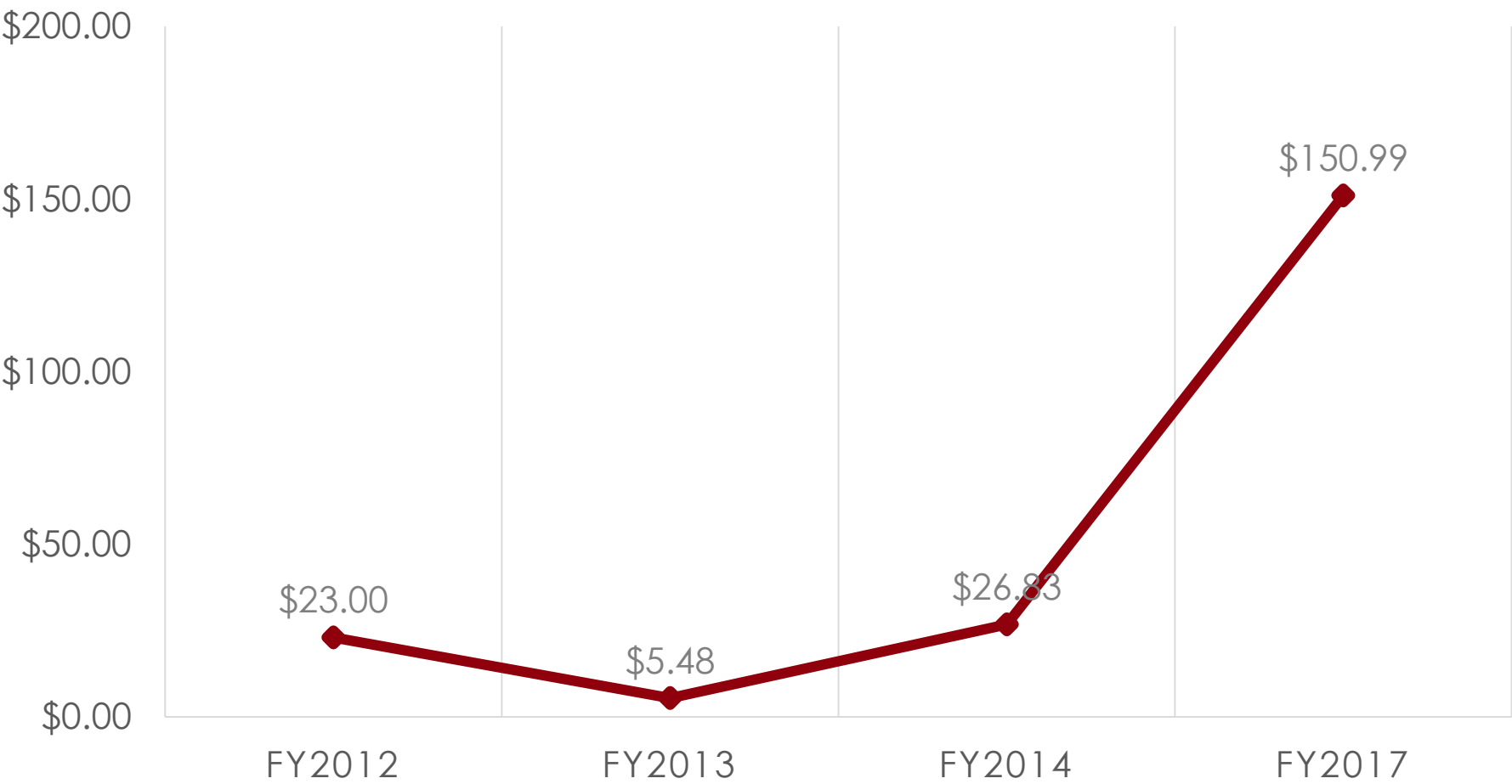


On-Island – Tracking

Gift/ Souvenir – Friends/ Family

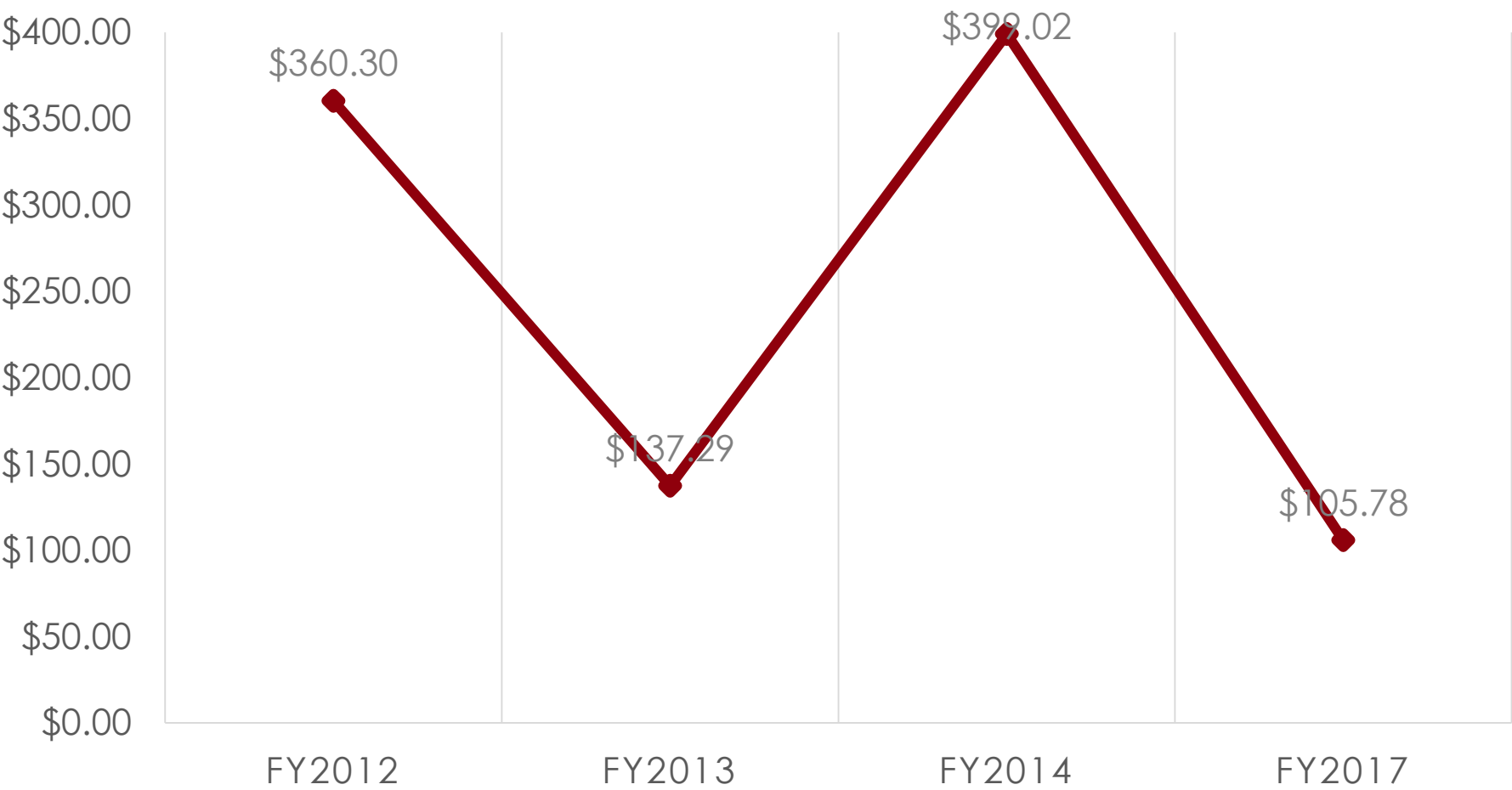


On-Island – Tracking Local Transportation



On-Island – Tracking

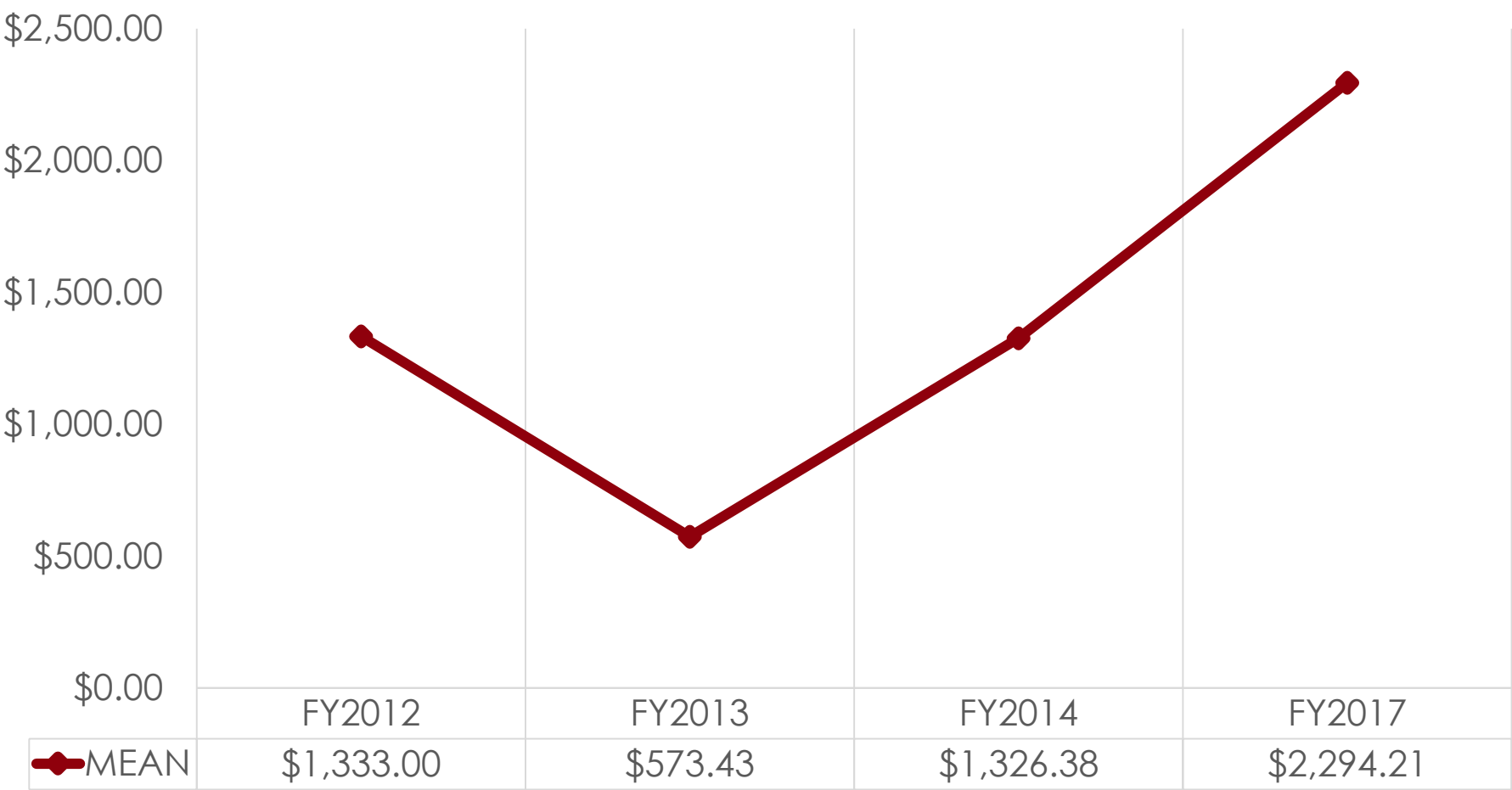
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$2,294.21 = overall mean average prepaid expense by respondent

TOTAL Per Person Expenditures – Tracking



GUAM AIRPORT EXPENDITURE – Tracking

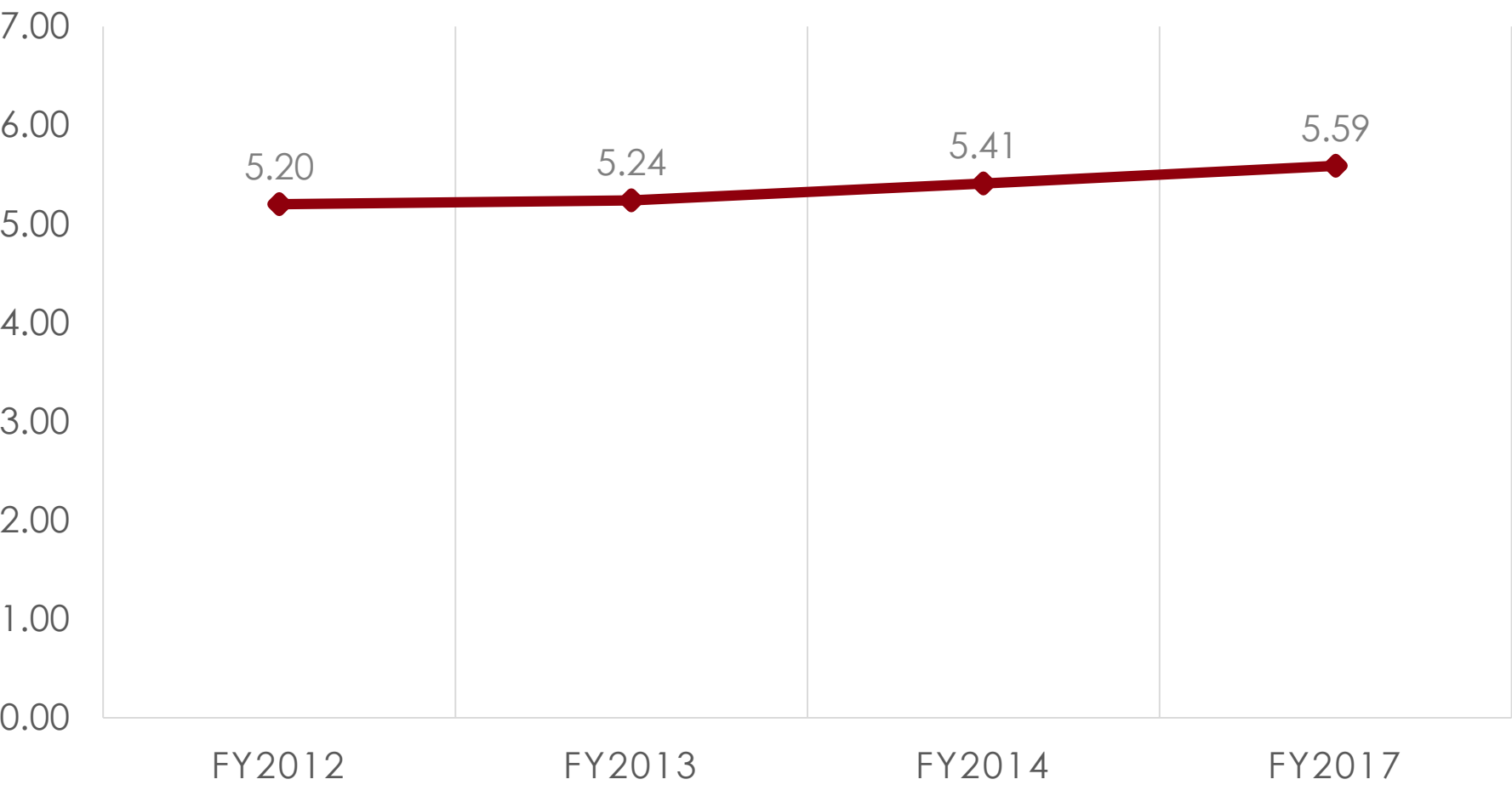


SECTION 4

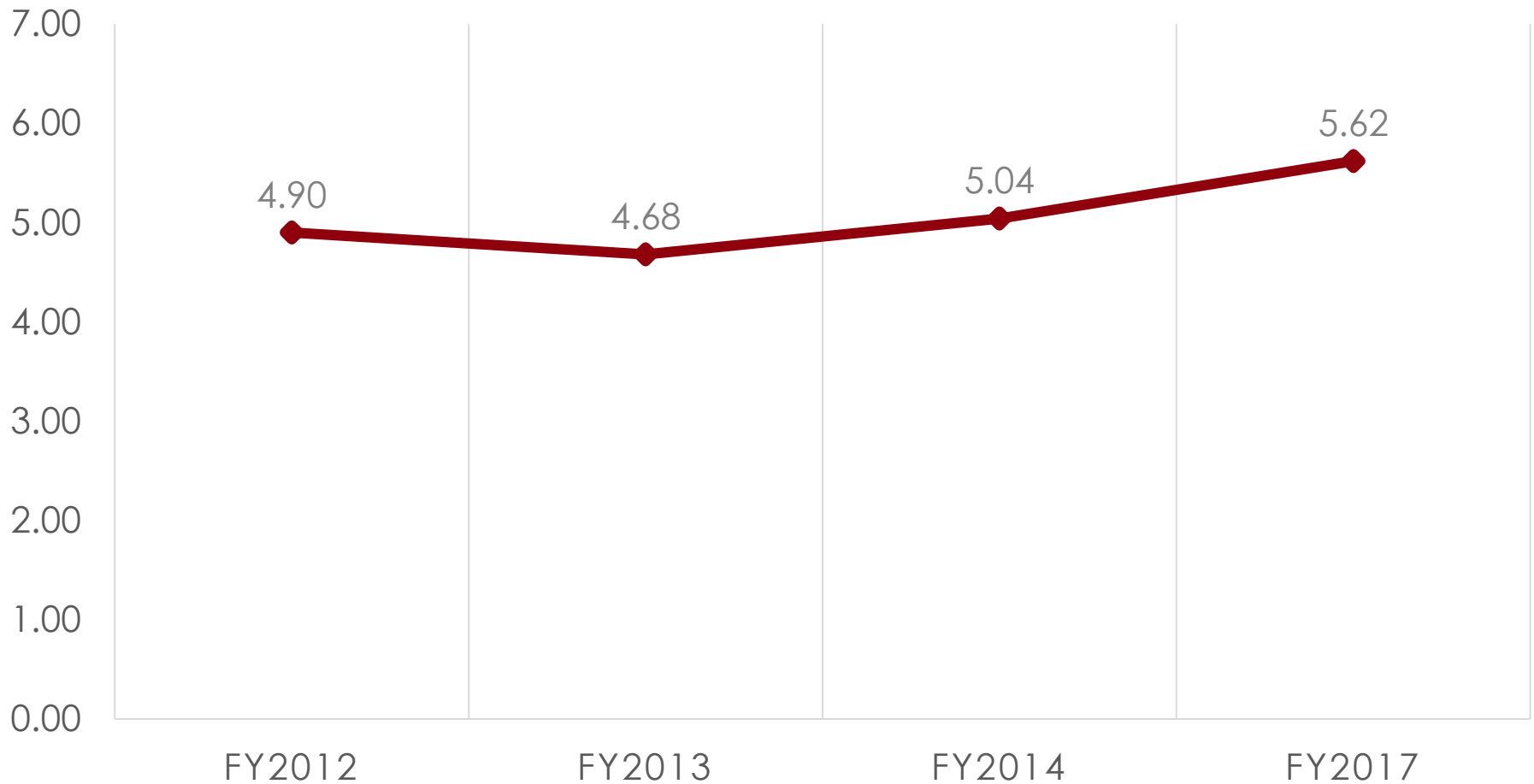
VISITOR SATISFACTION

BEHAVIOR

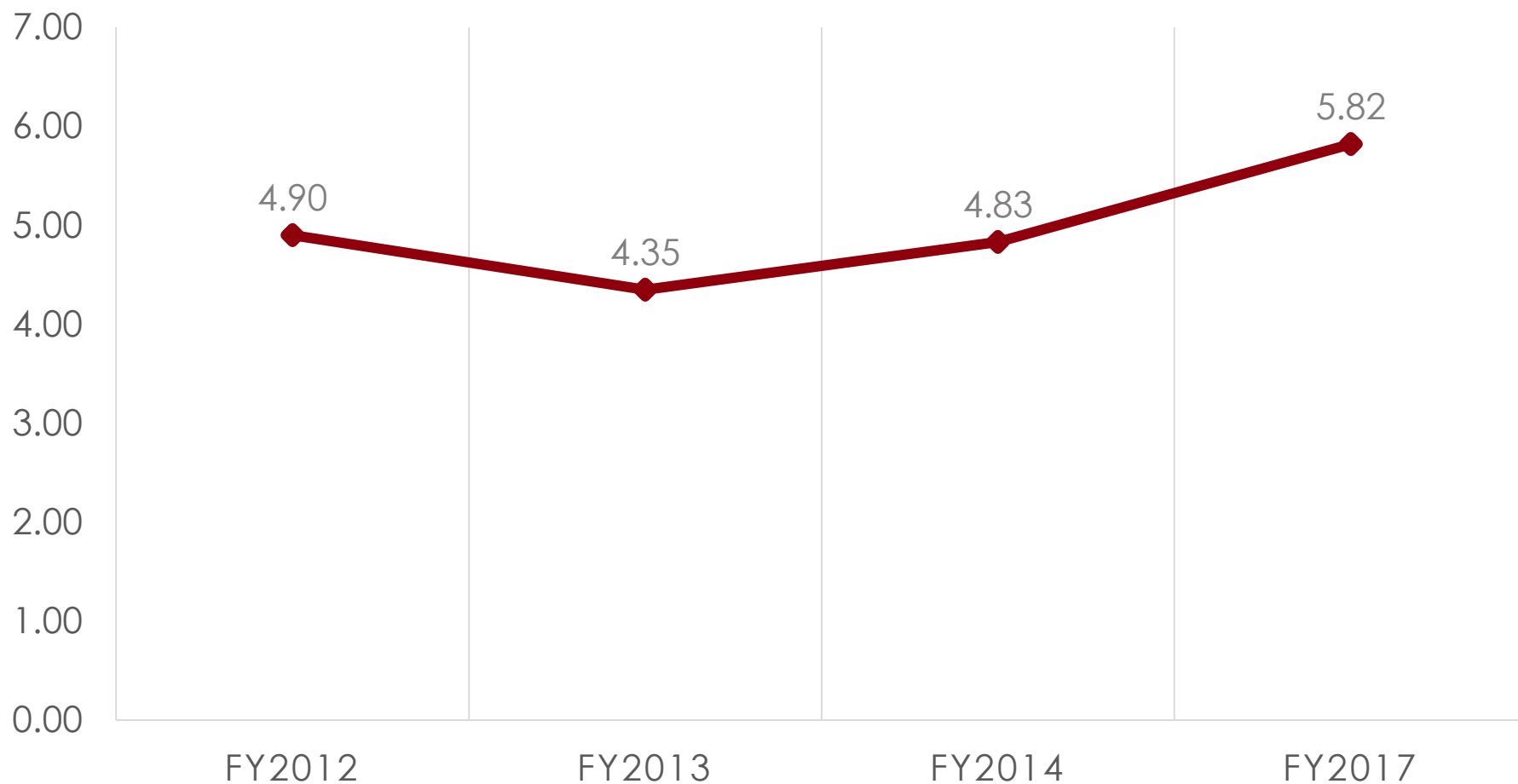
OVERALL SATISFACTION



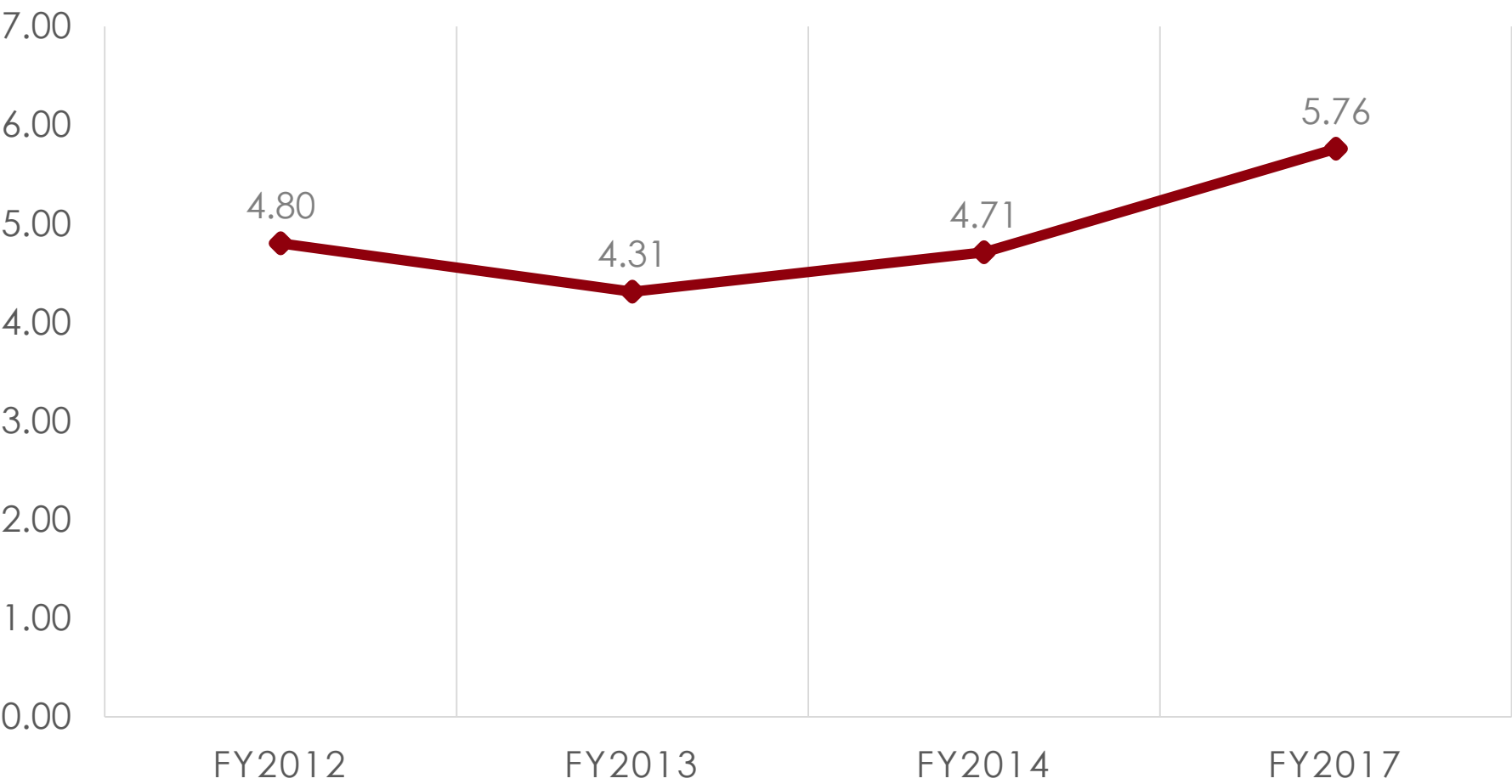
Guam was better than expected



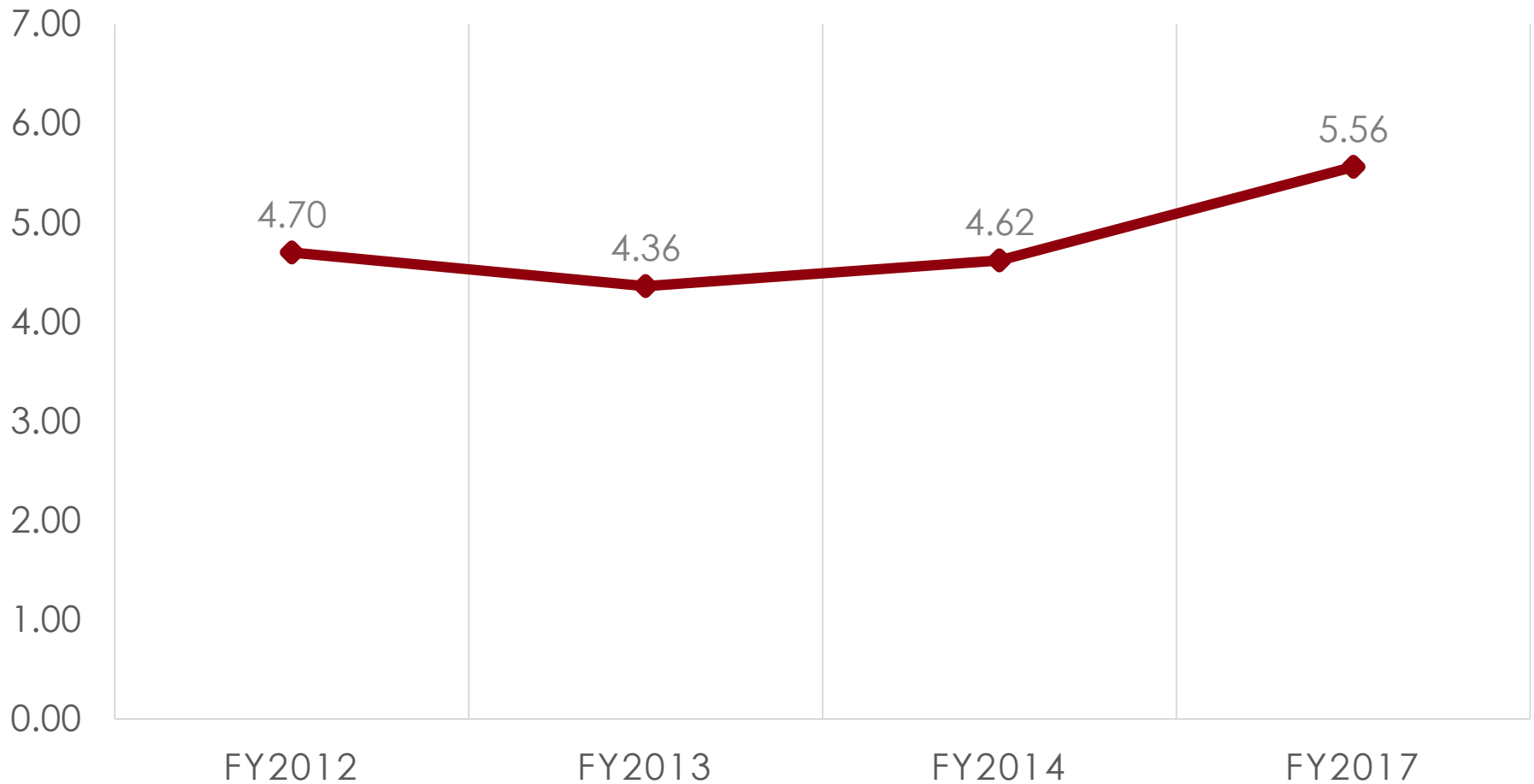
I had no communication problems



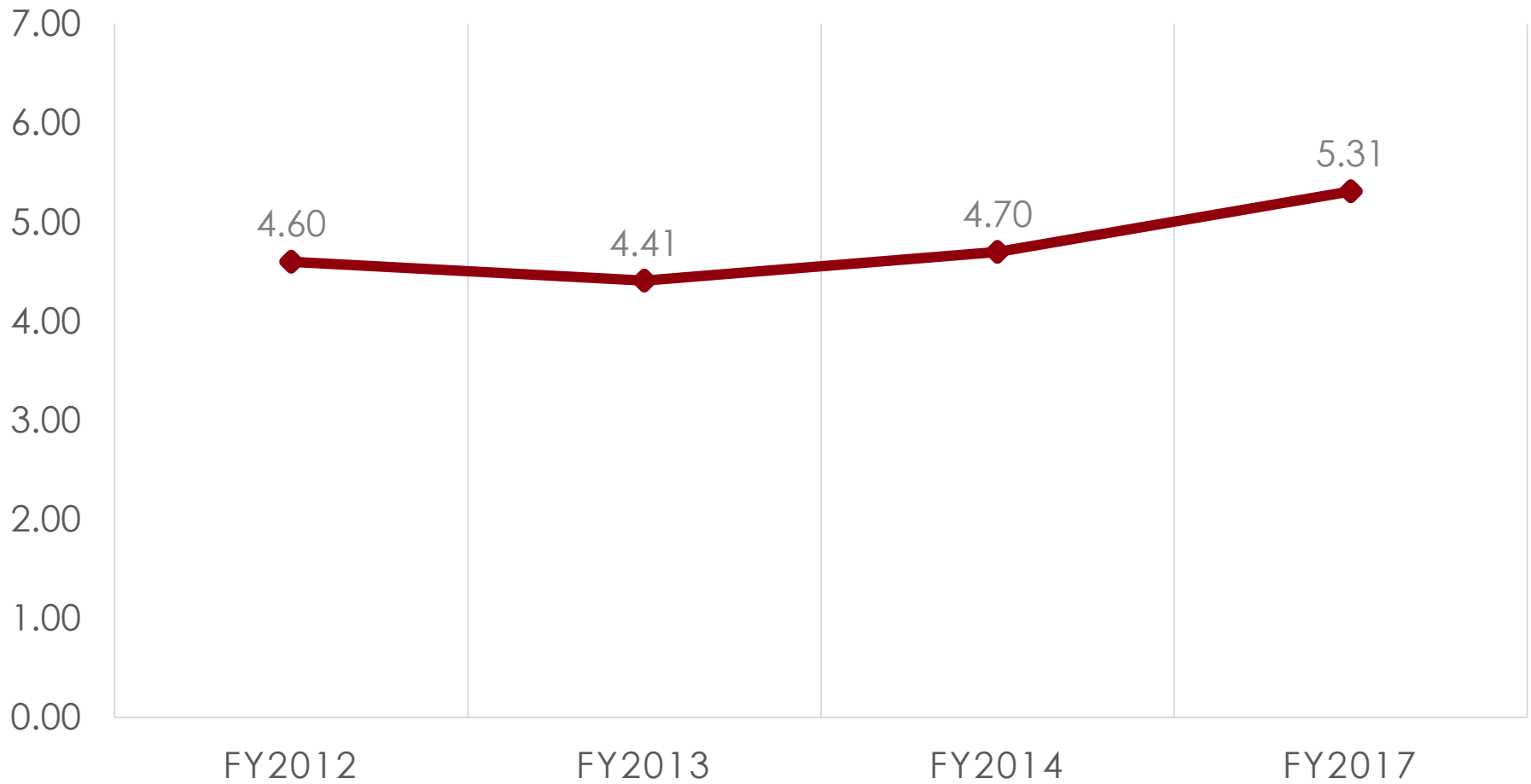
I will recommend Guam to friends



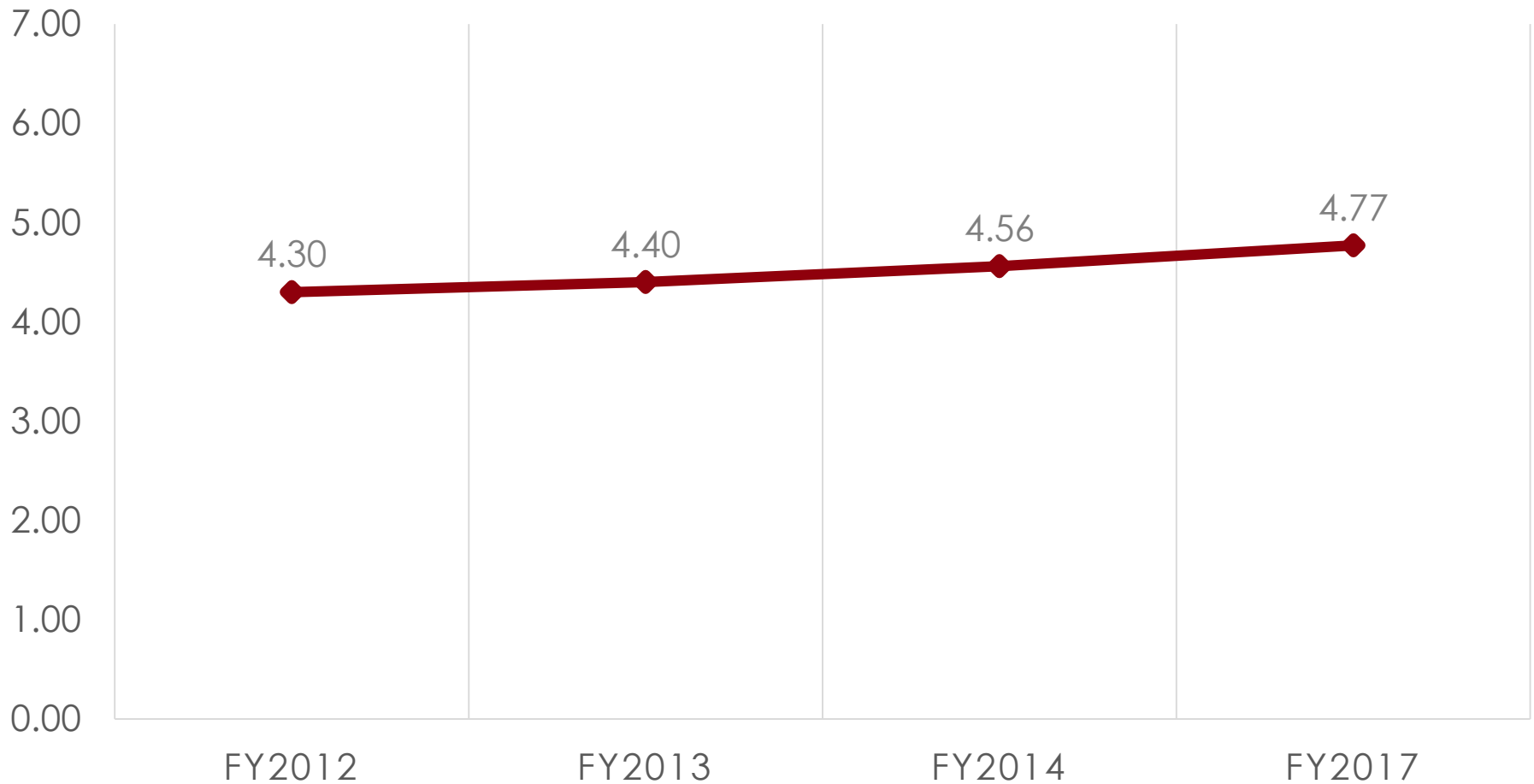
Sites on Guam were attractive



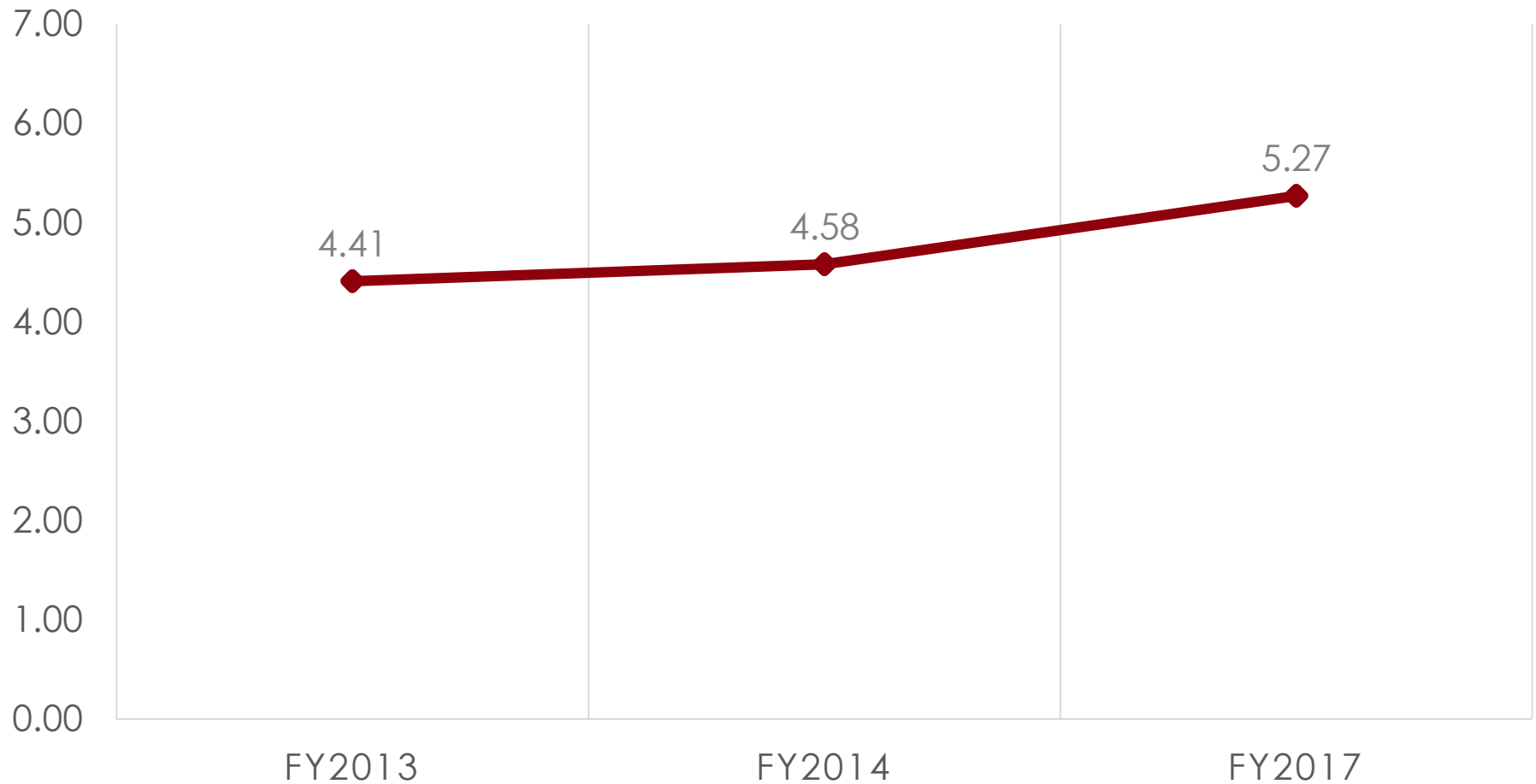
I plan to visit Guam again



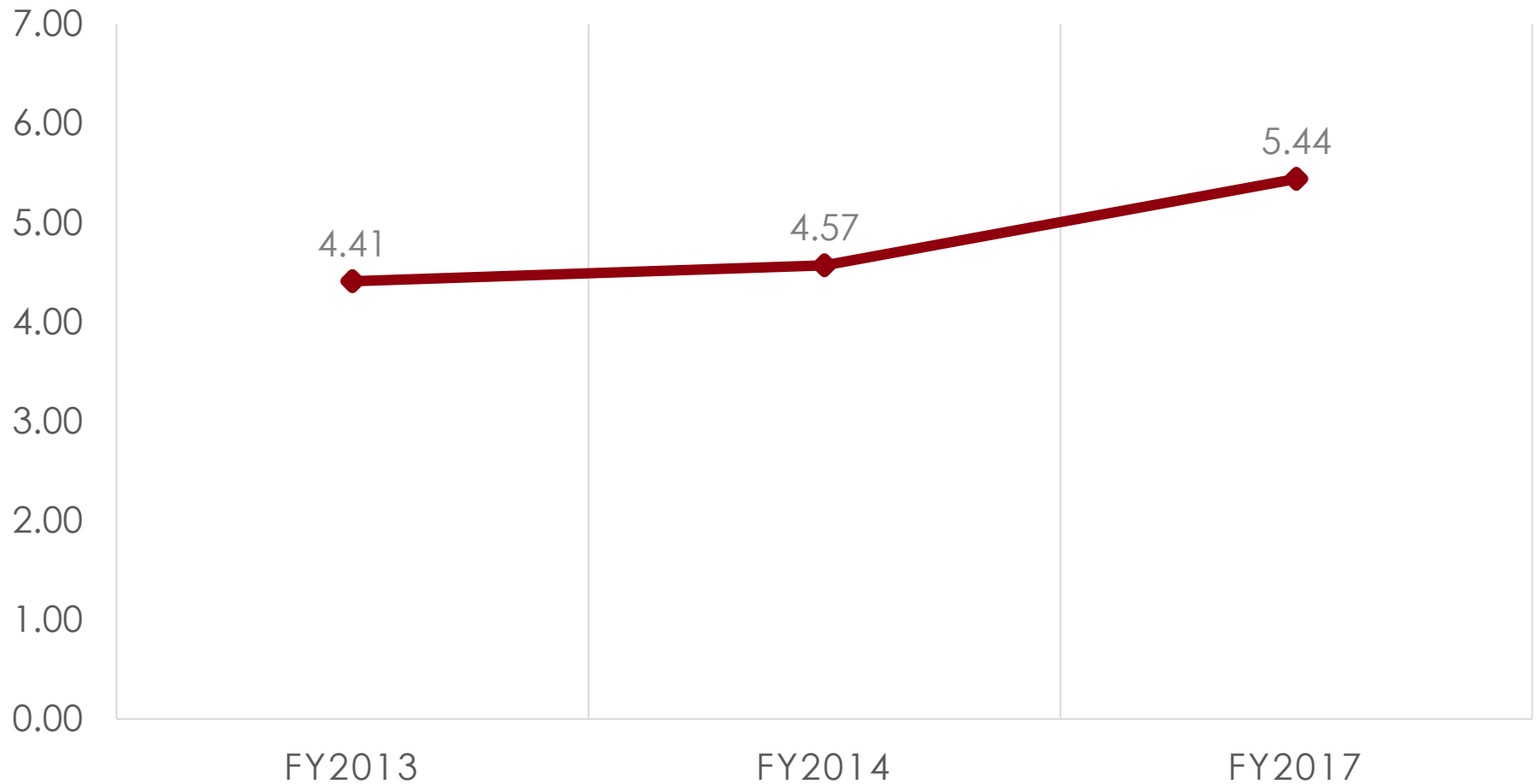
Not enough night time activities



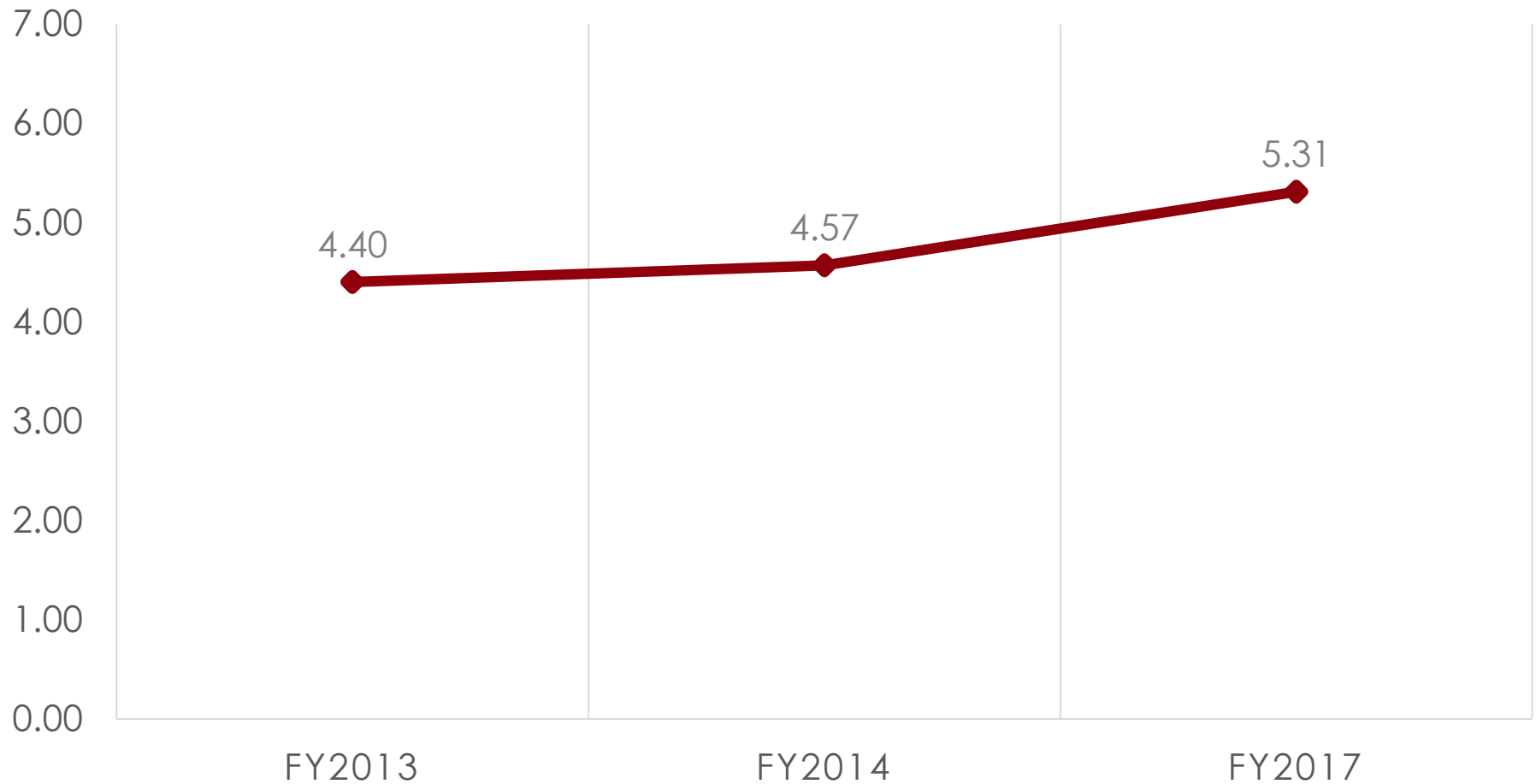
Tour guides were professional



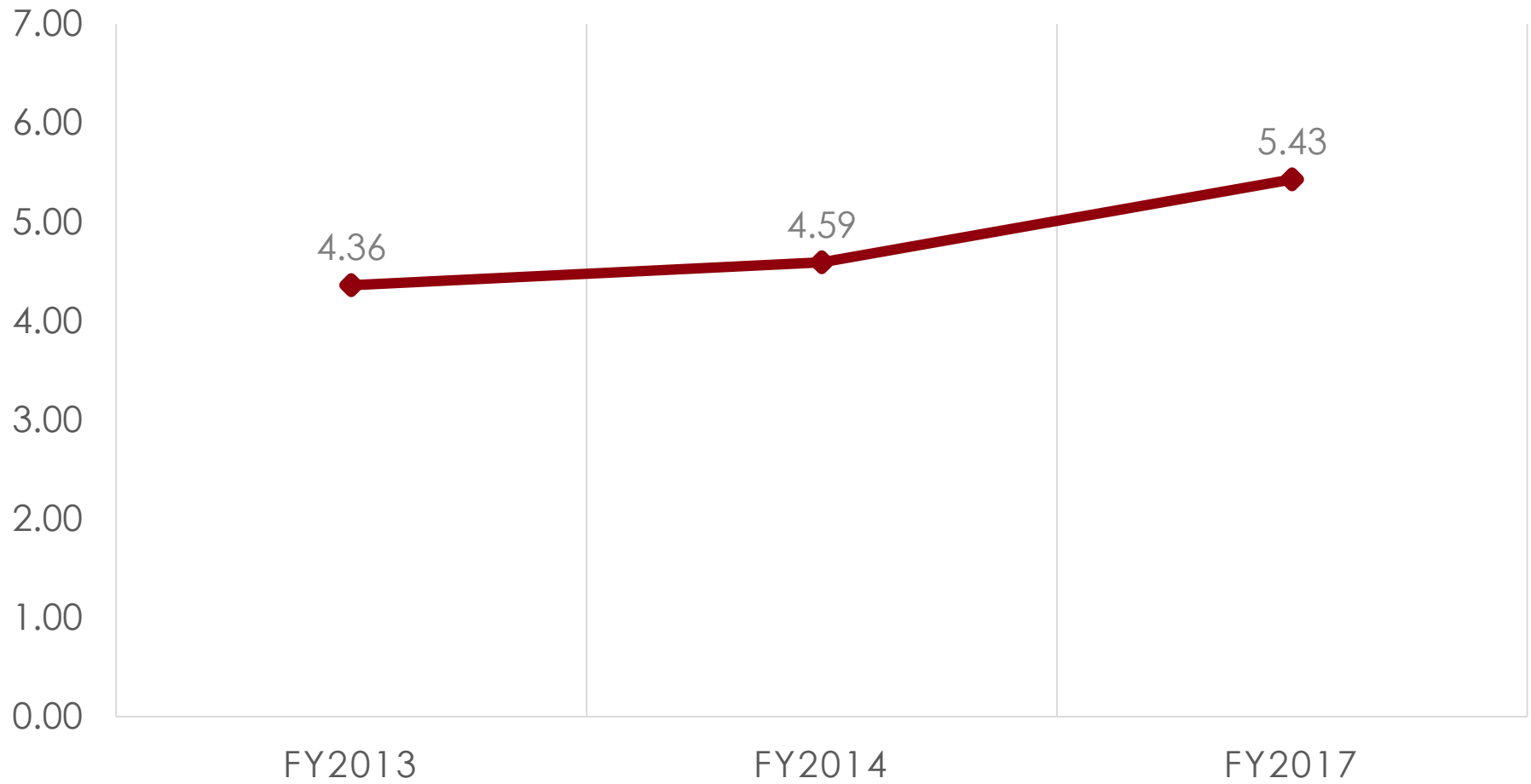
Tour drivers were professional



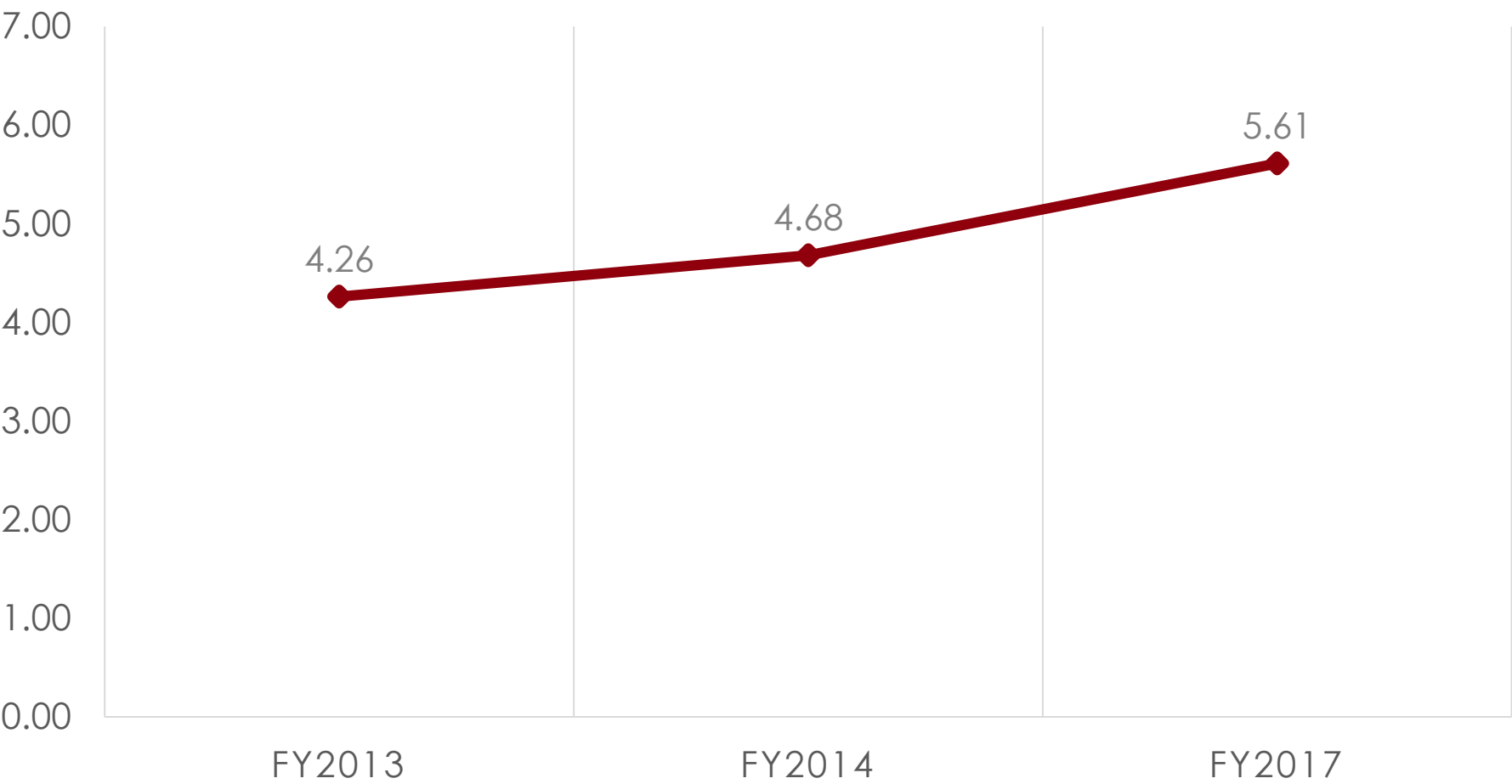
Taxi drivers were professional



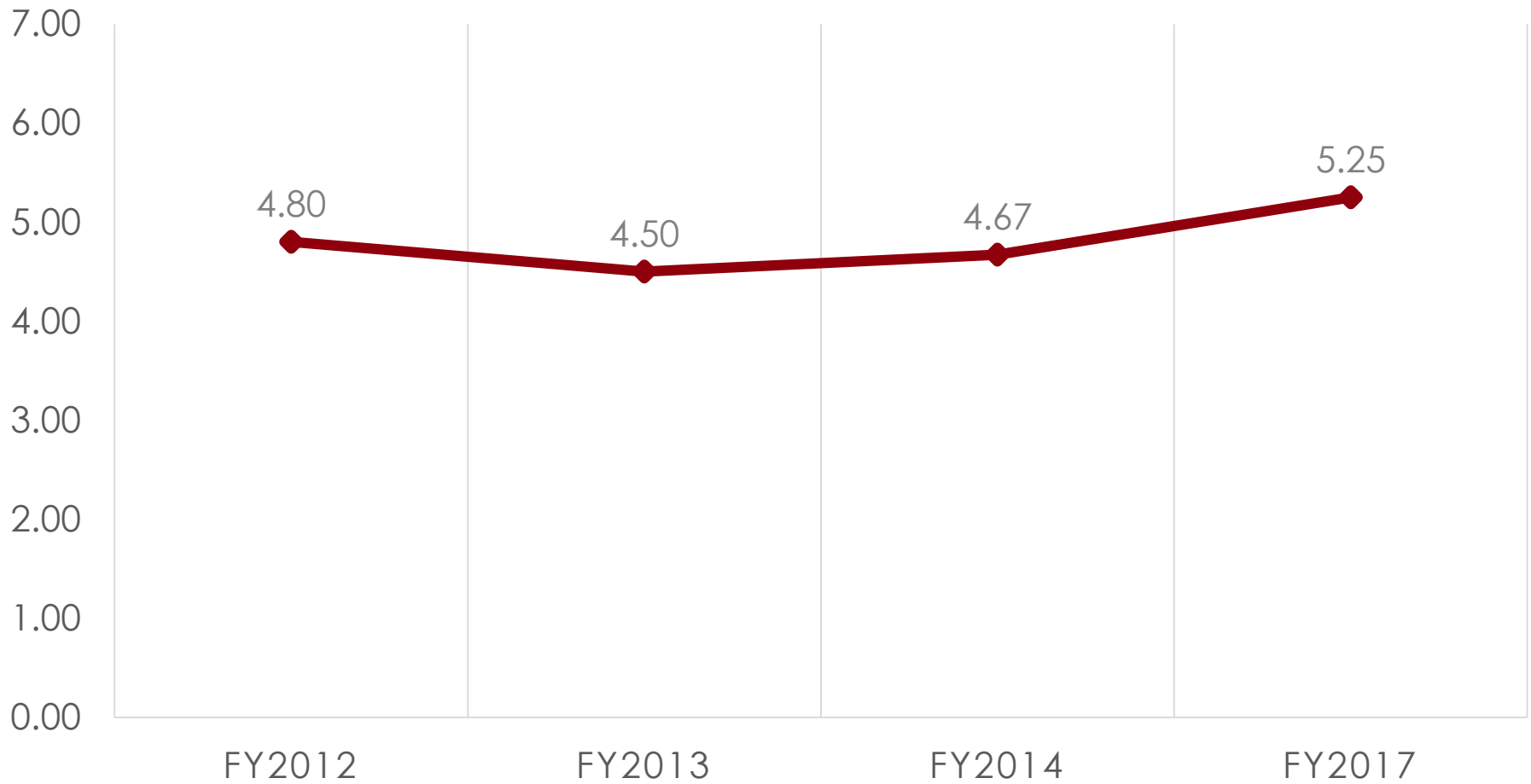
Taxis were clean



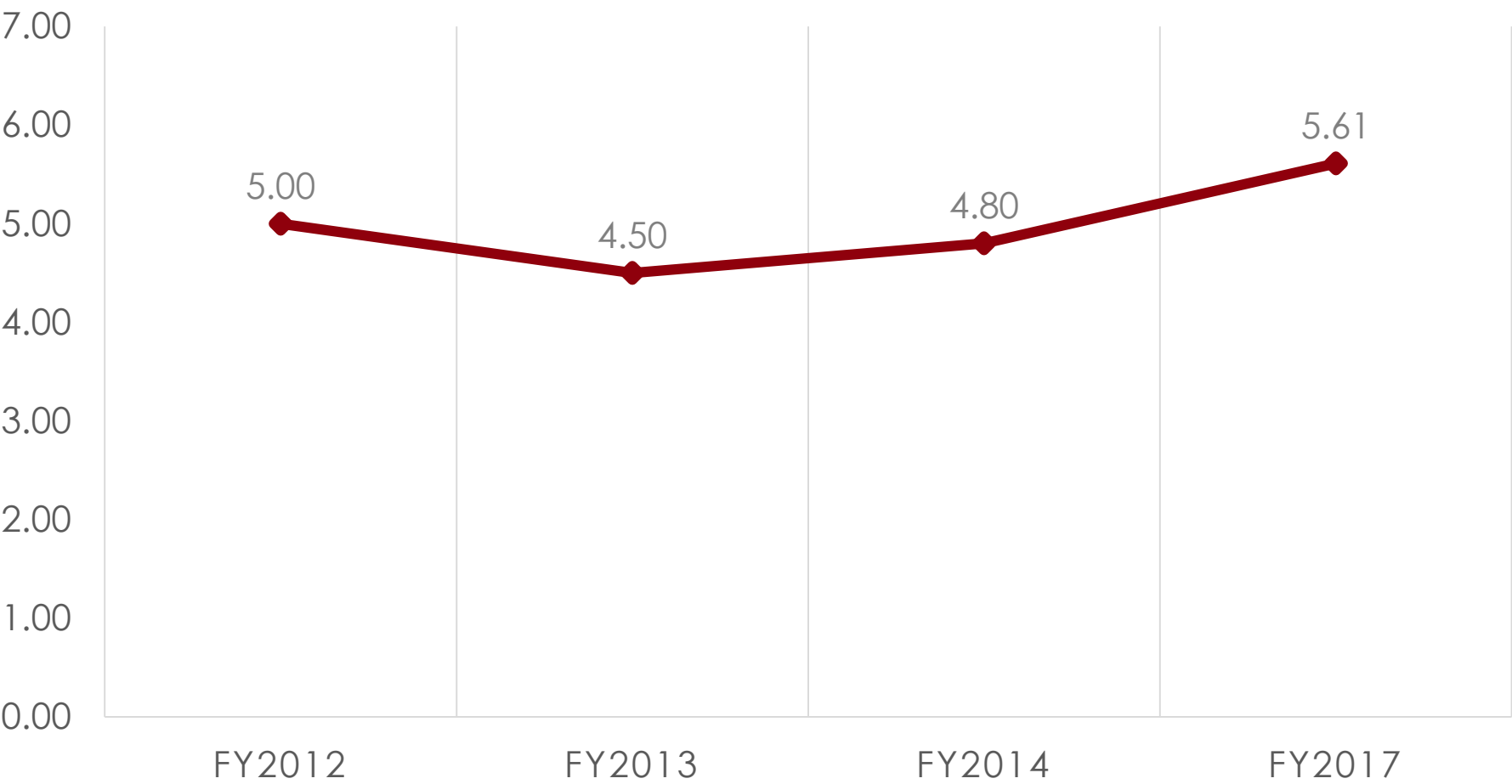
Guam airport was clean



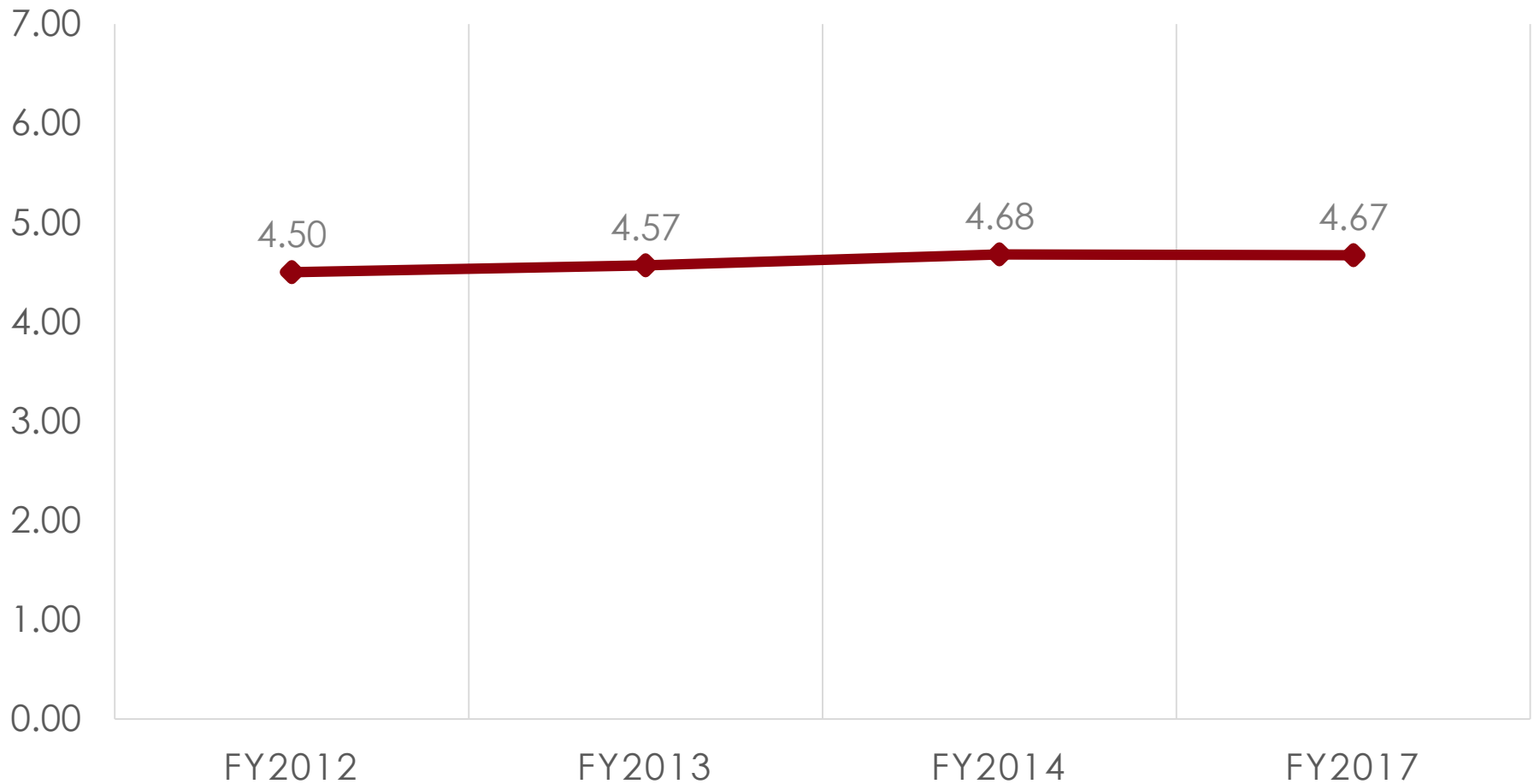
Ease of getting around



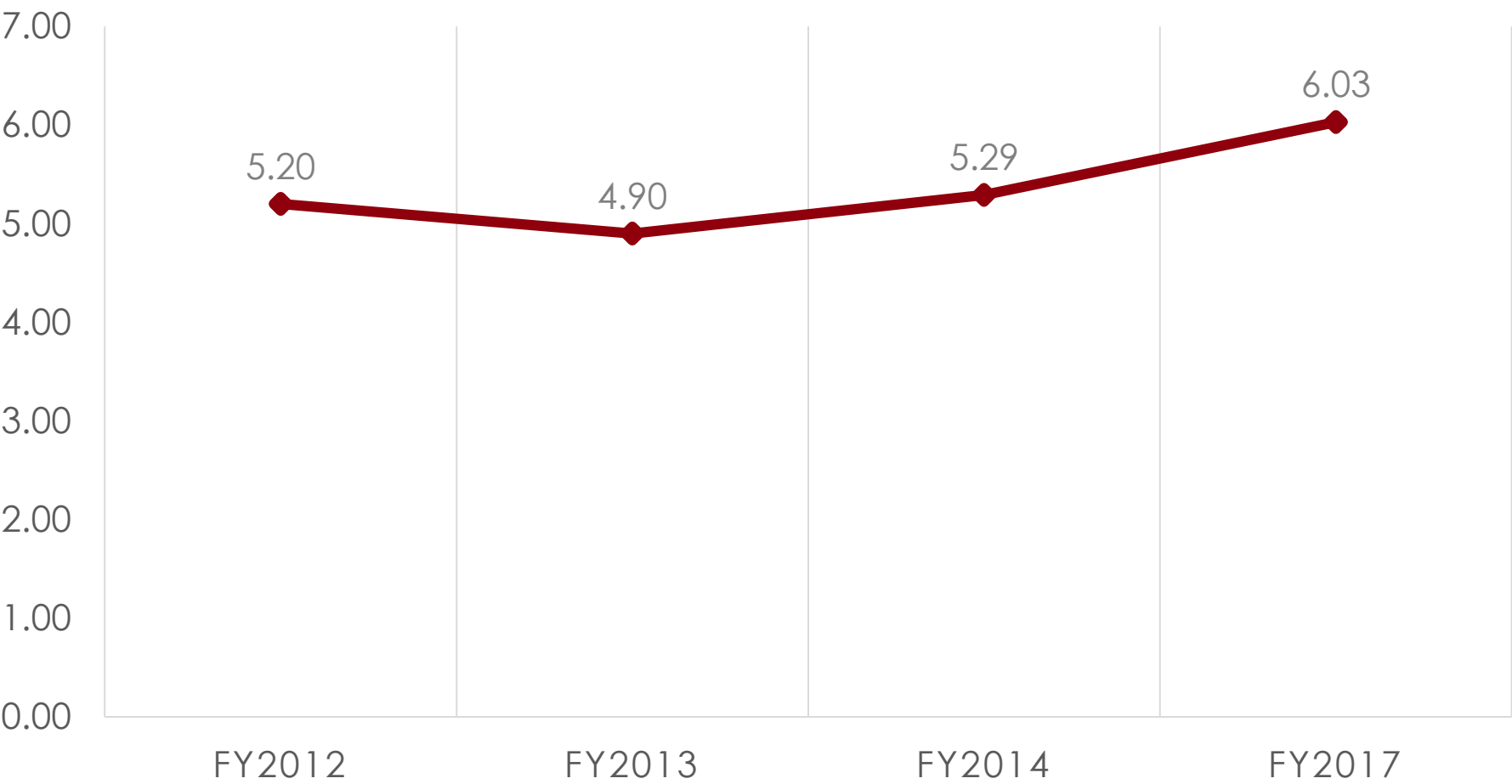
Safety walking around at night



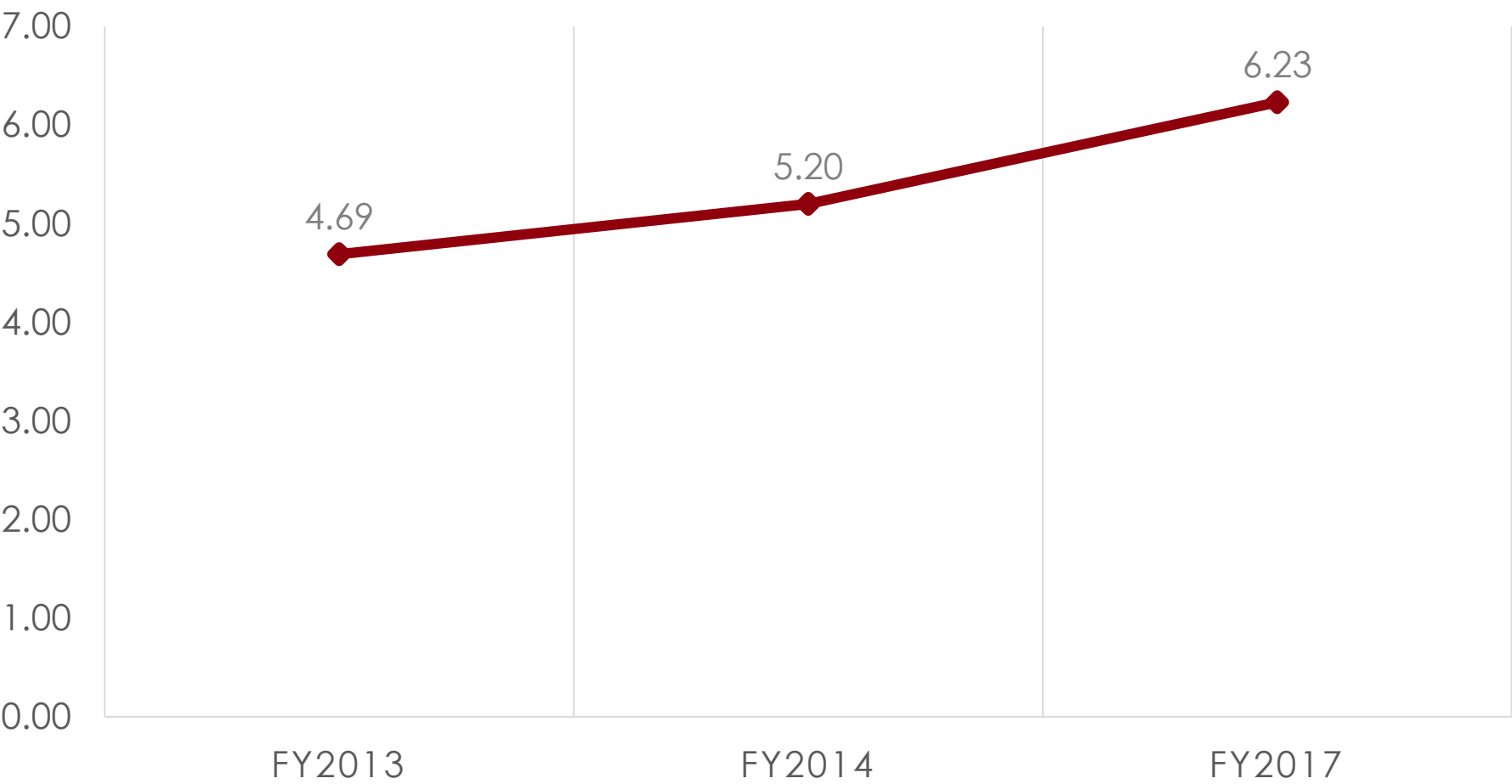
Price of things on Guam



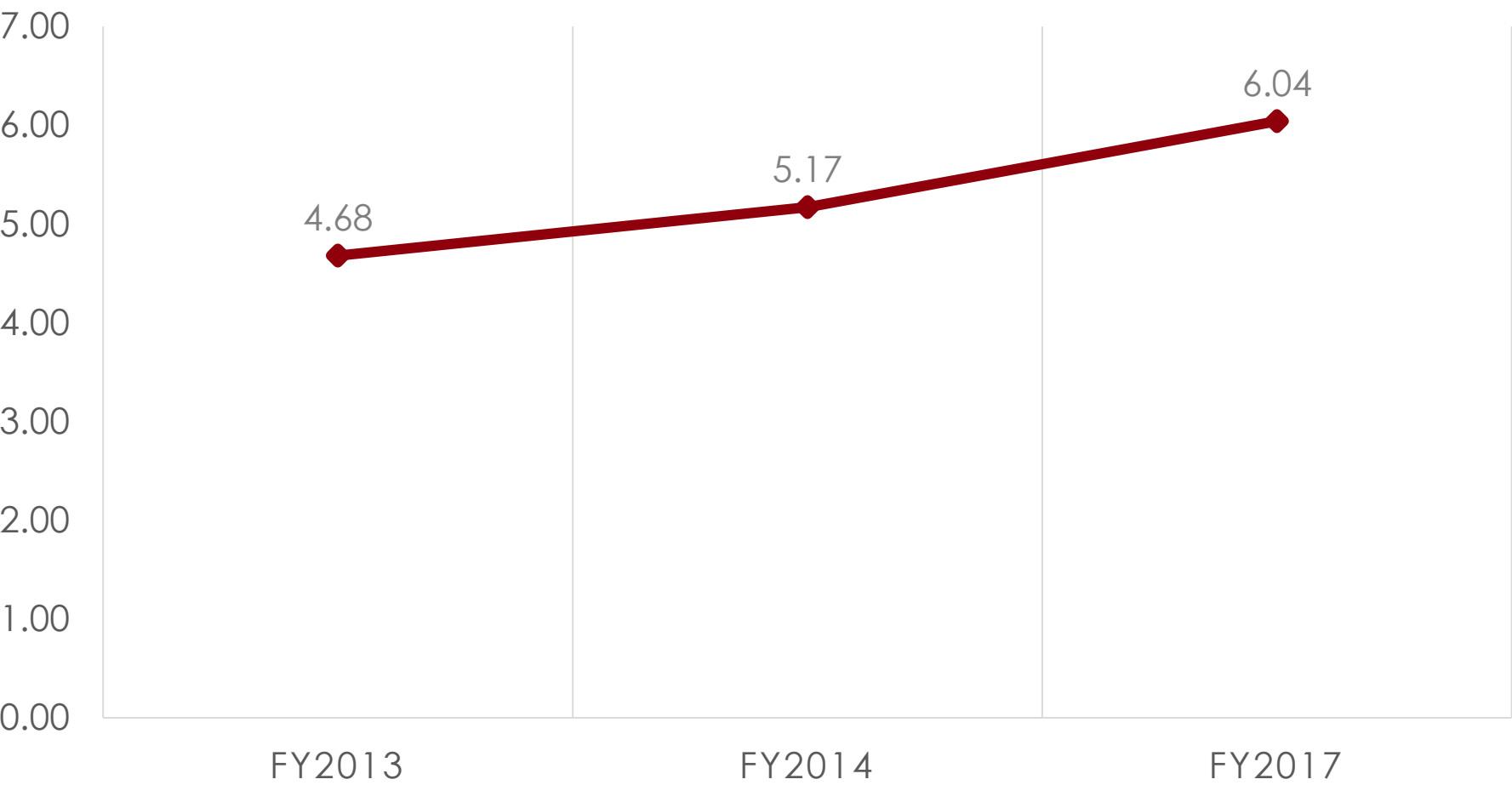
Quality/ Cleanliness- beach, ocean



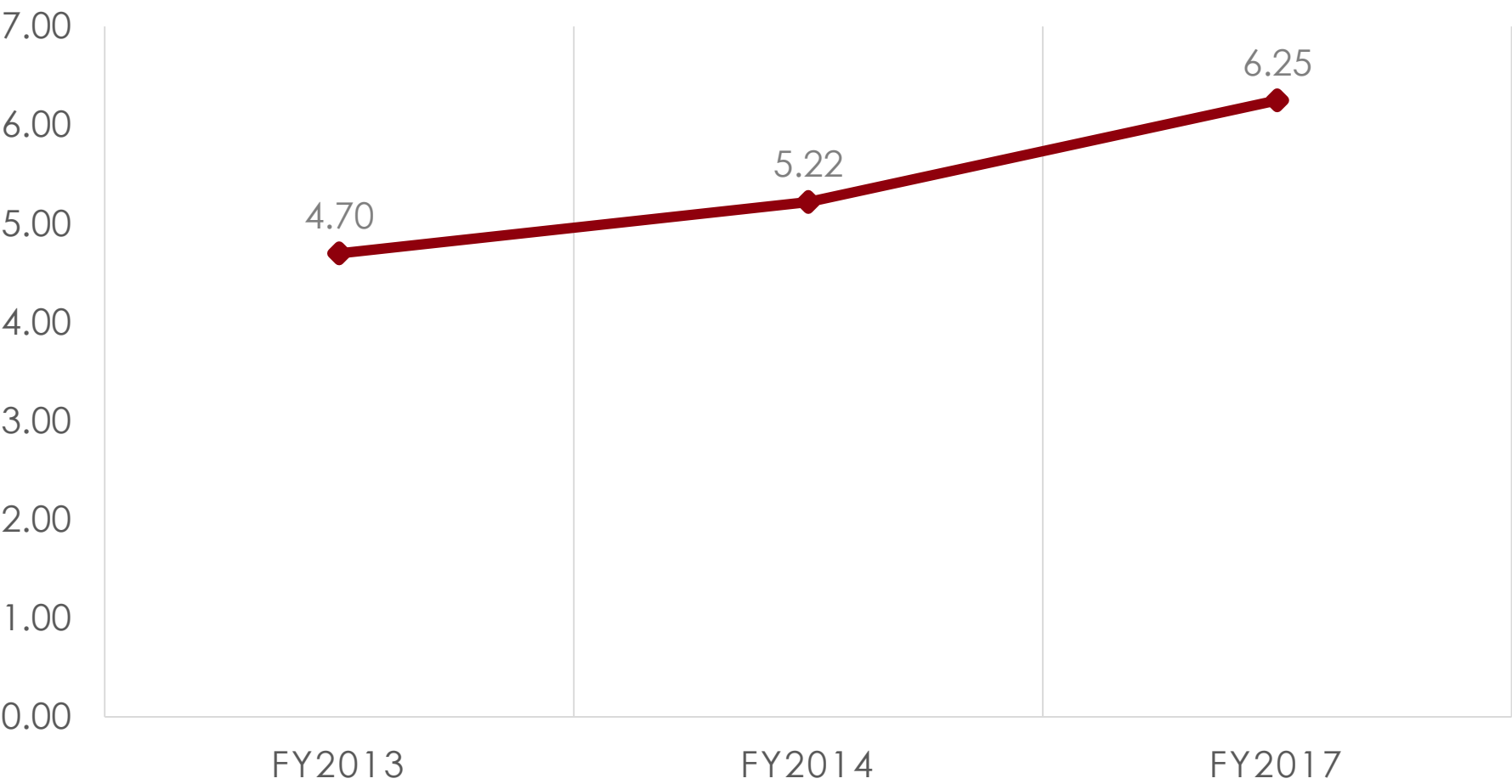
Quality/ Cleanliness- air, sky



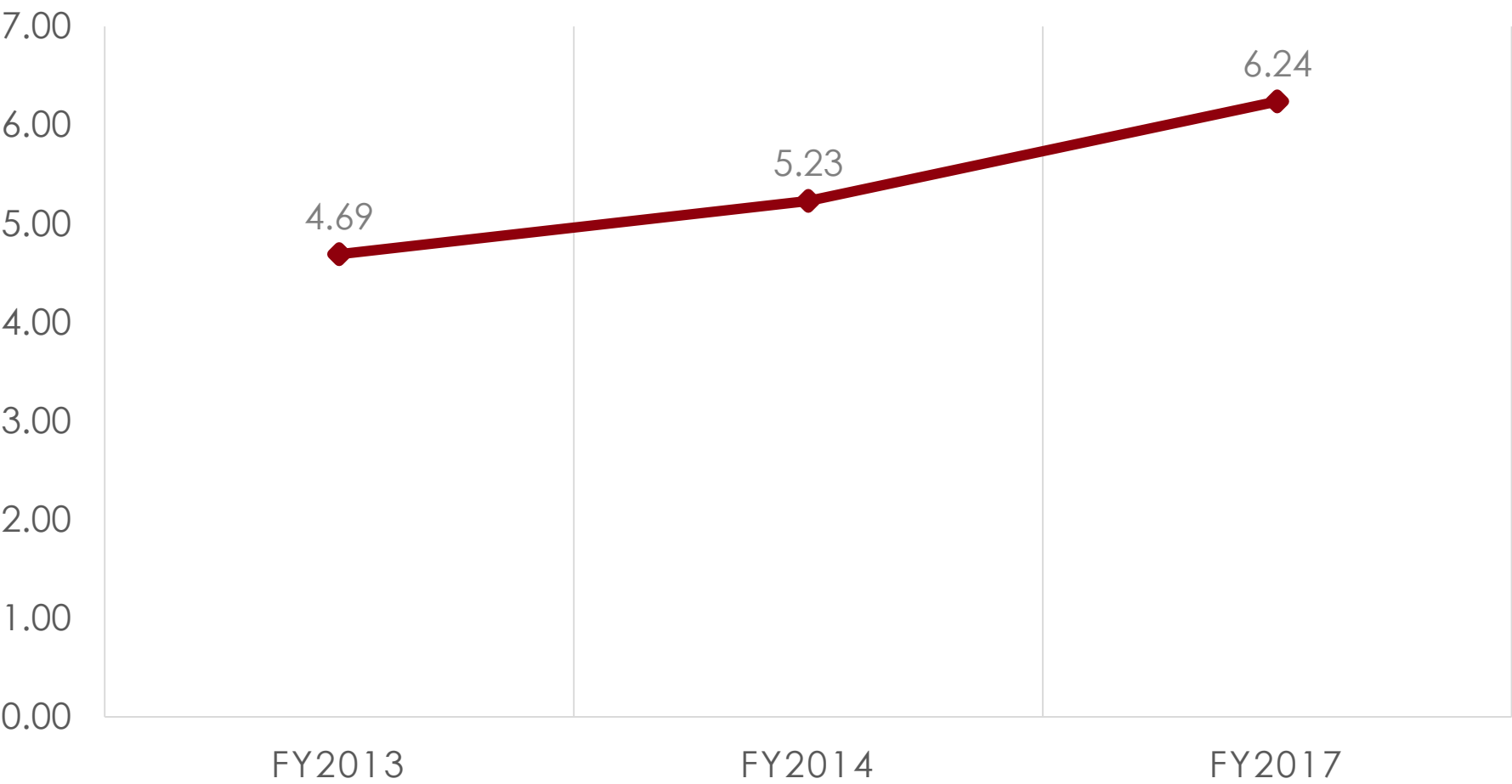
Quality/ Cleanliness- parks



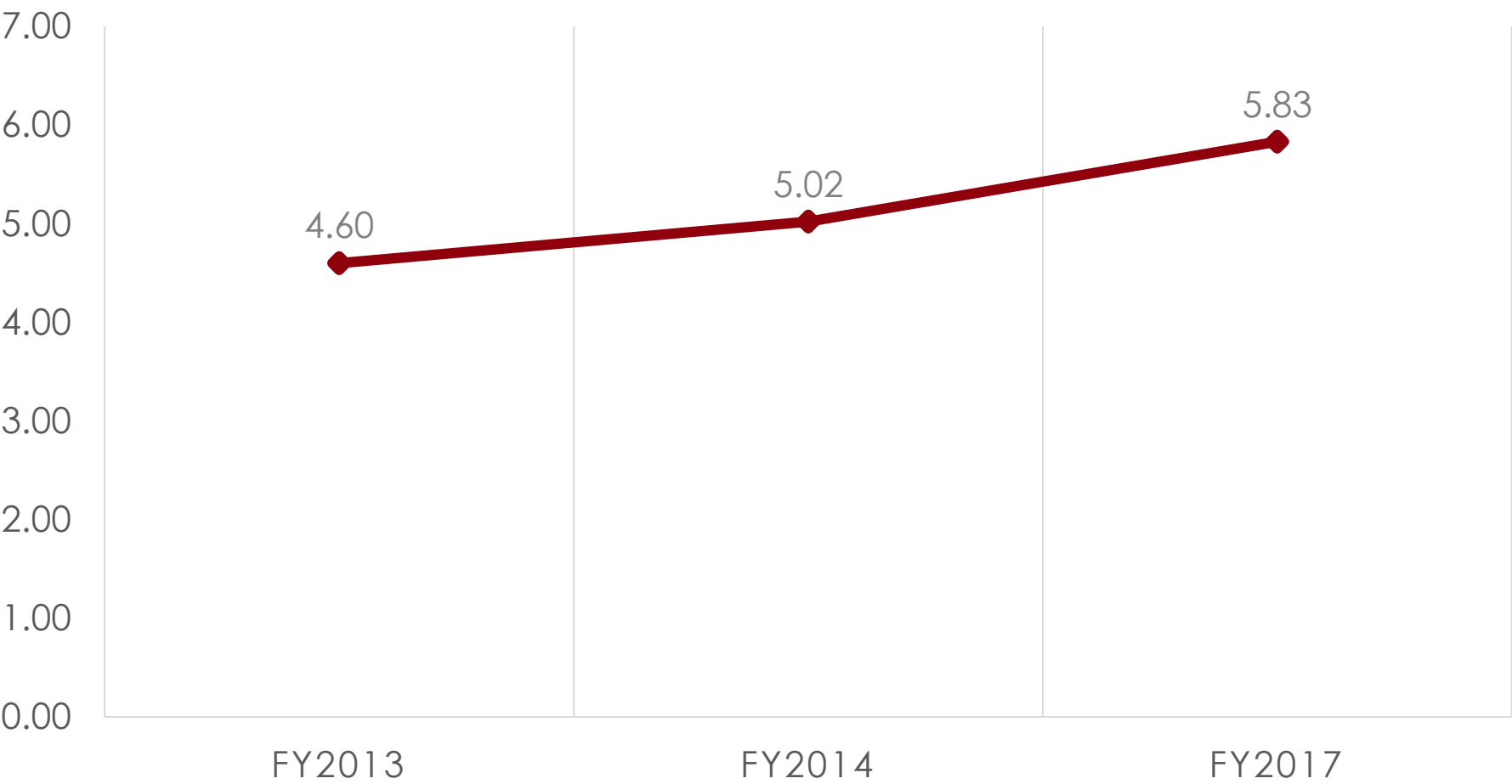
Quality- landscape Tumon



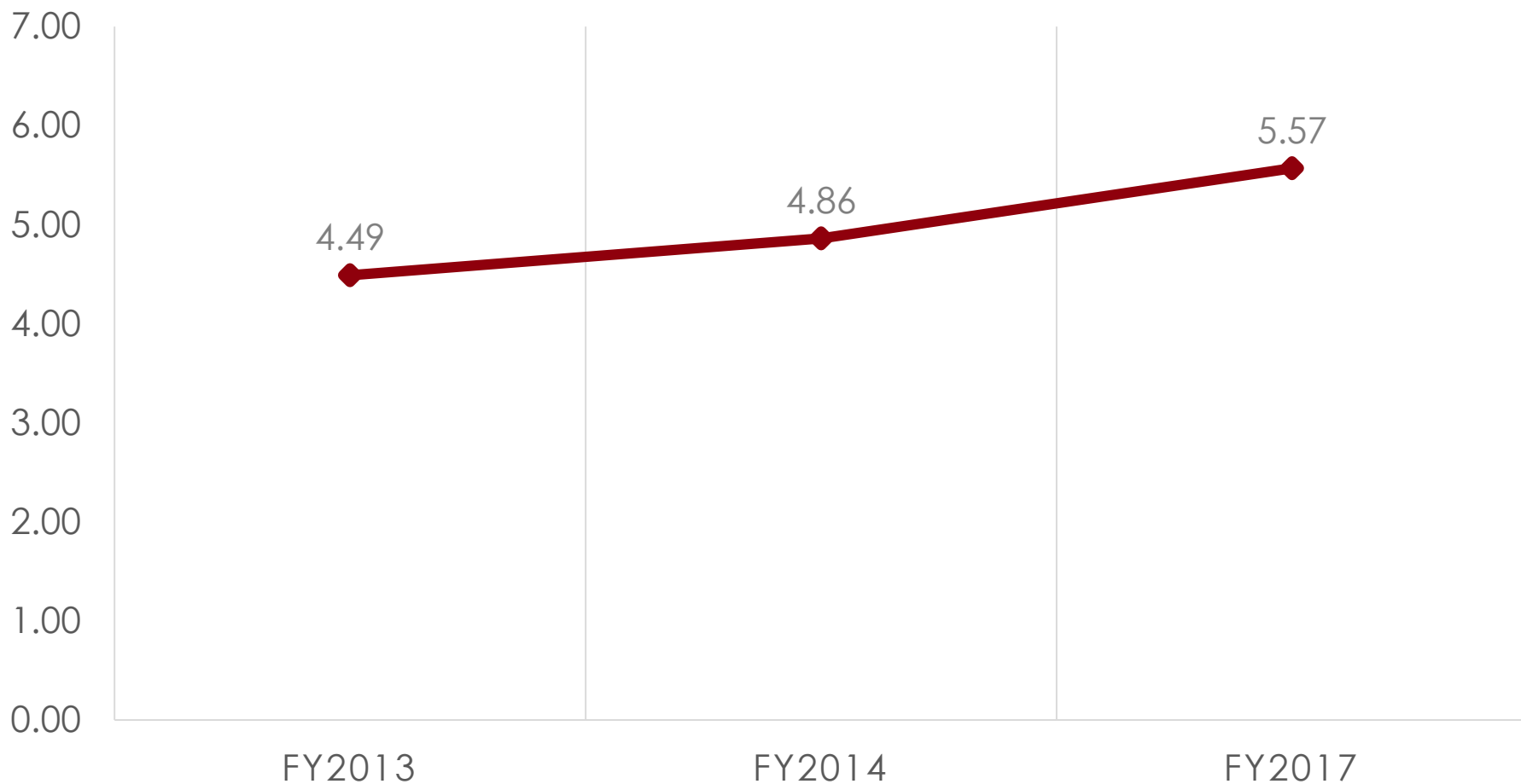
Quality- landscape Guam



Quality- ground handler

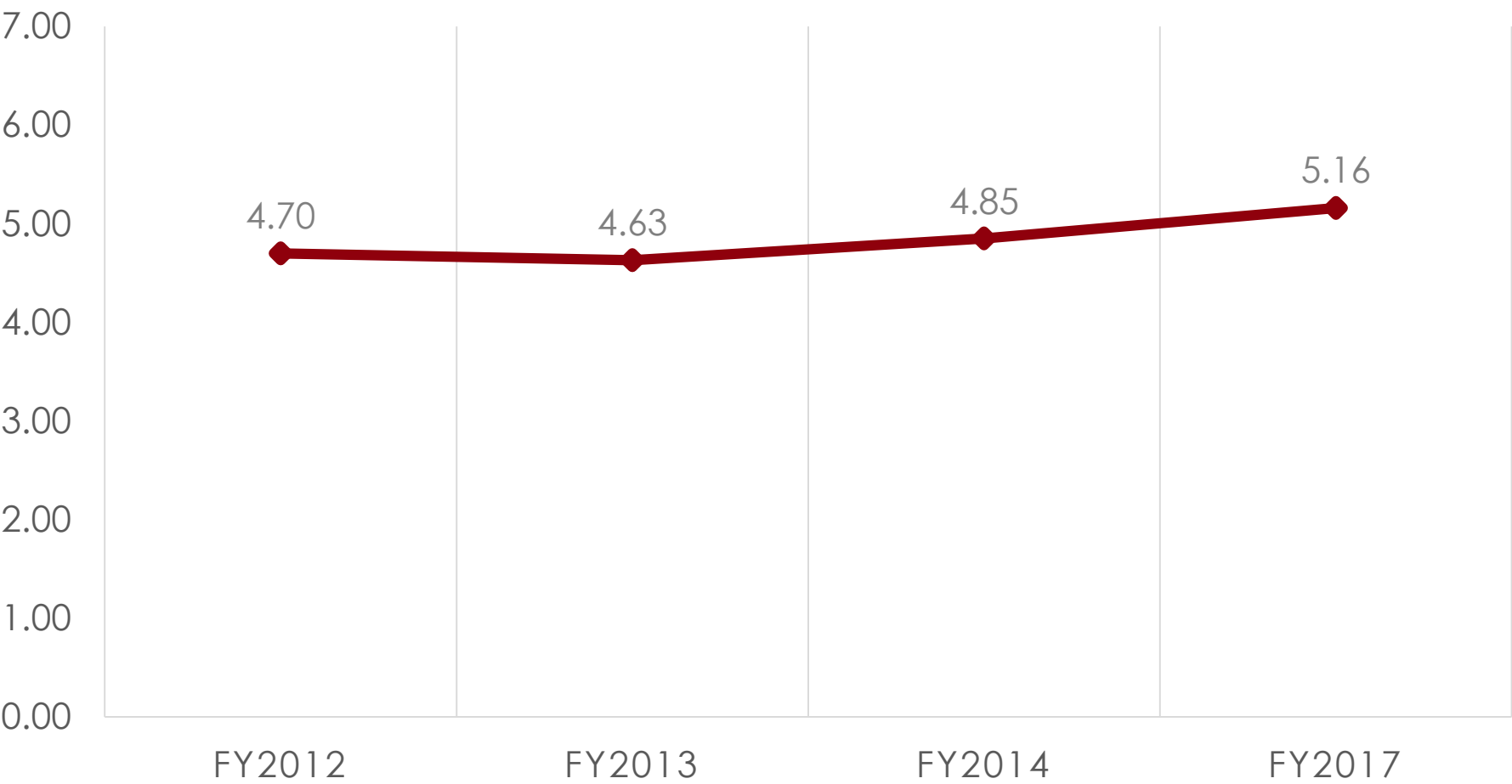


Quality/ Cleanliness- transportation vehicle

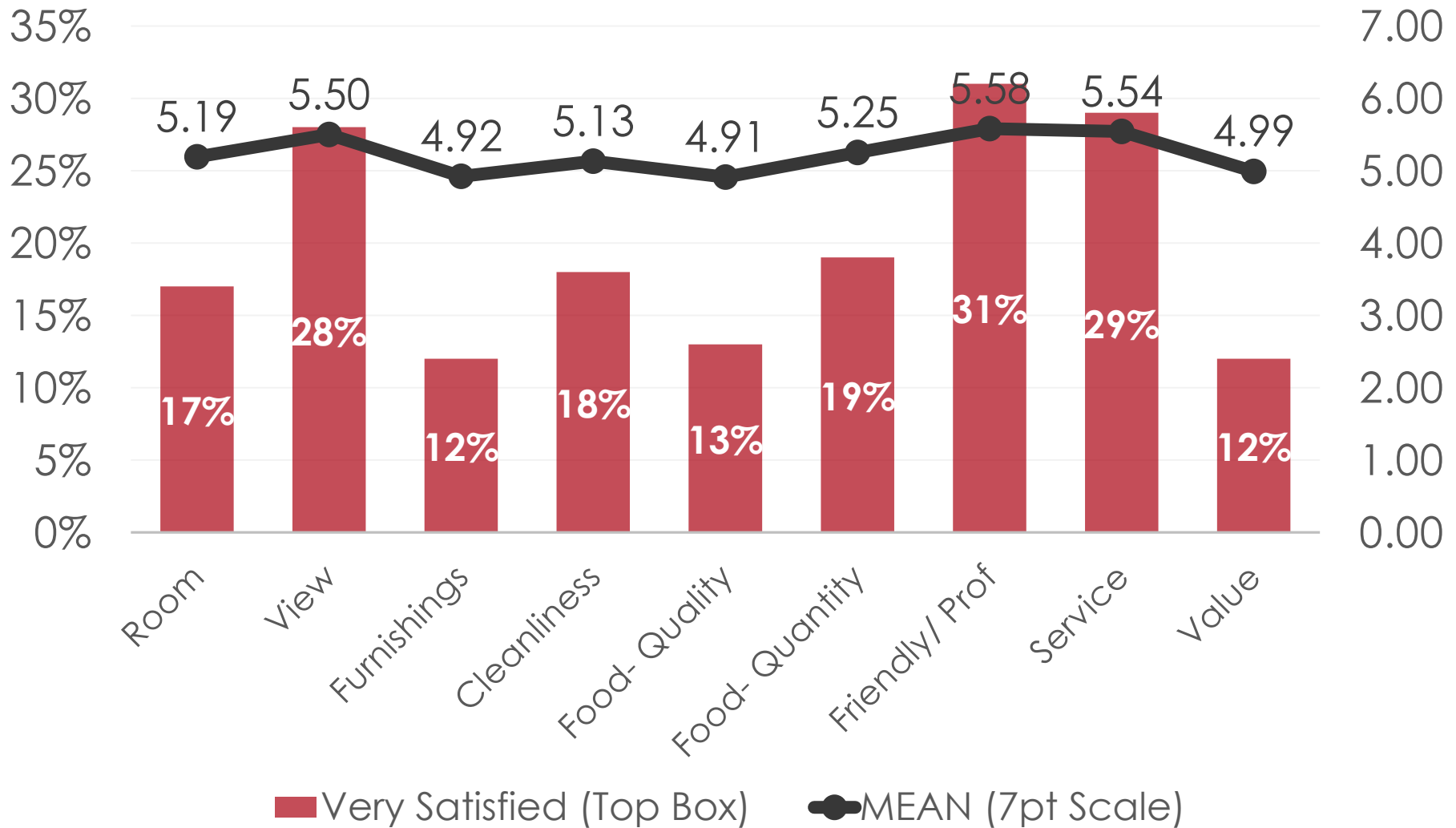


ACCOMMODATIONS

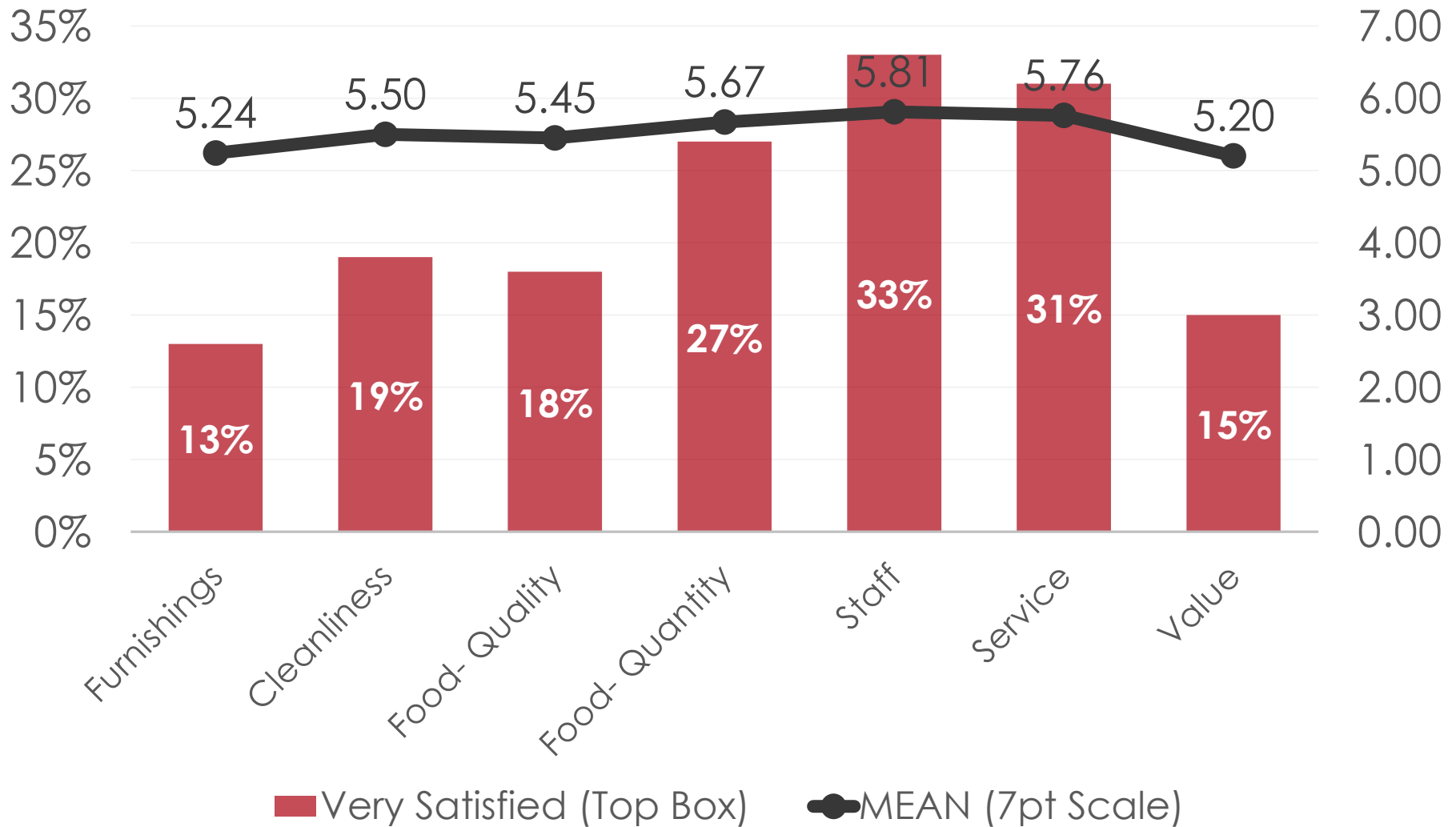
OVERALL SATISFACTION



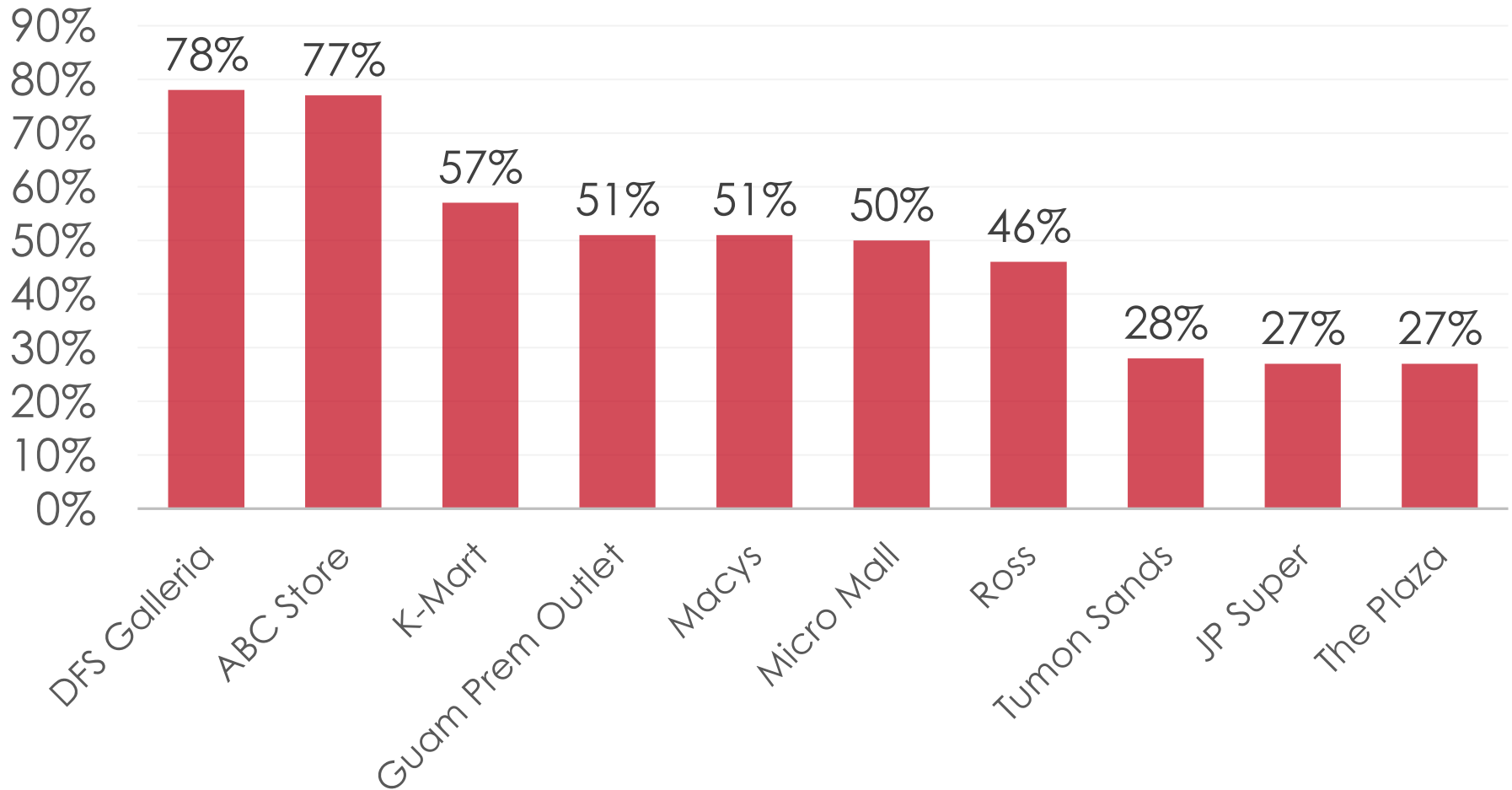
ACCOMMODATIONS – Satisfaction by Category



DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



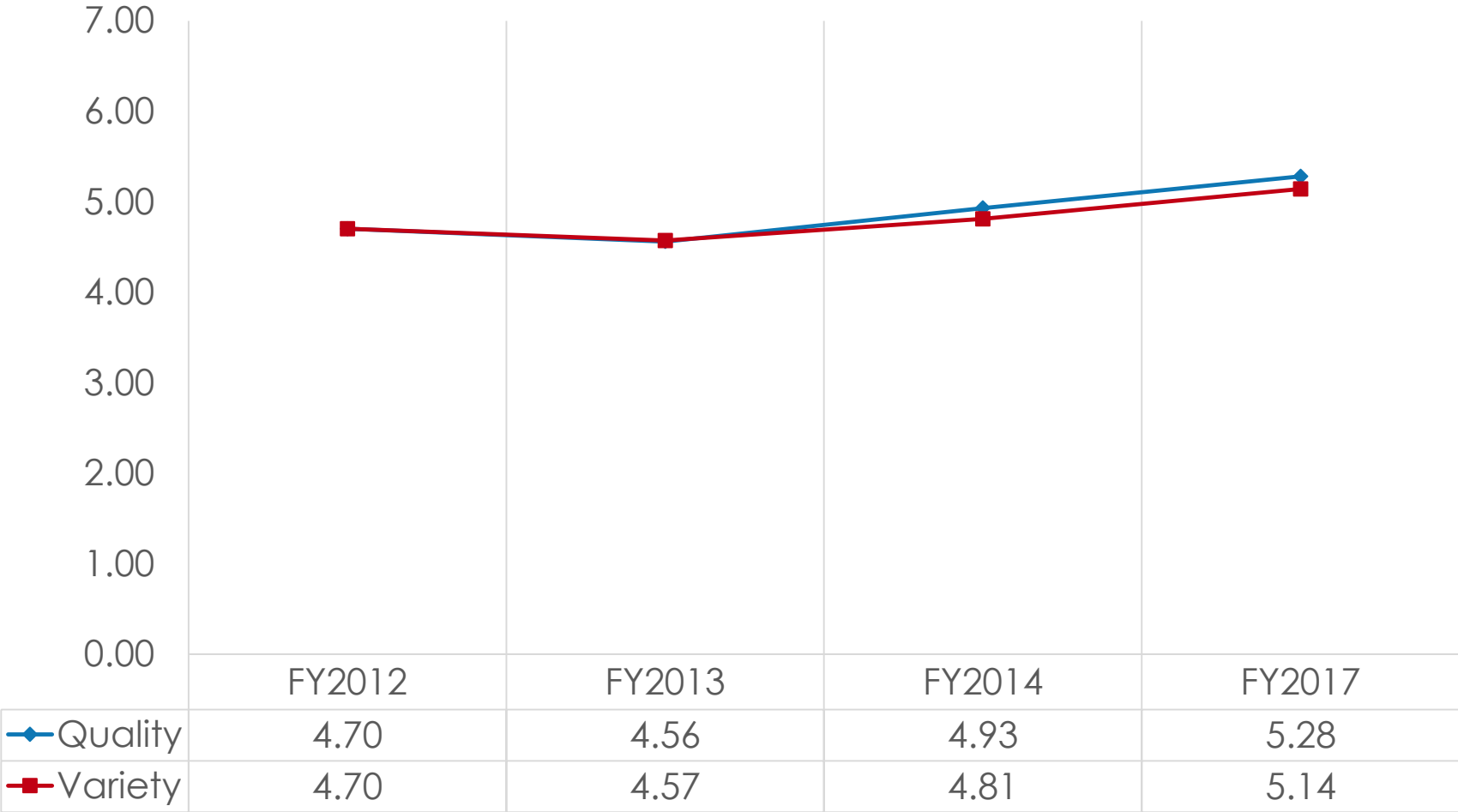
Shopping Malls/ Stores (Top Responses)



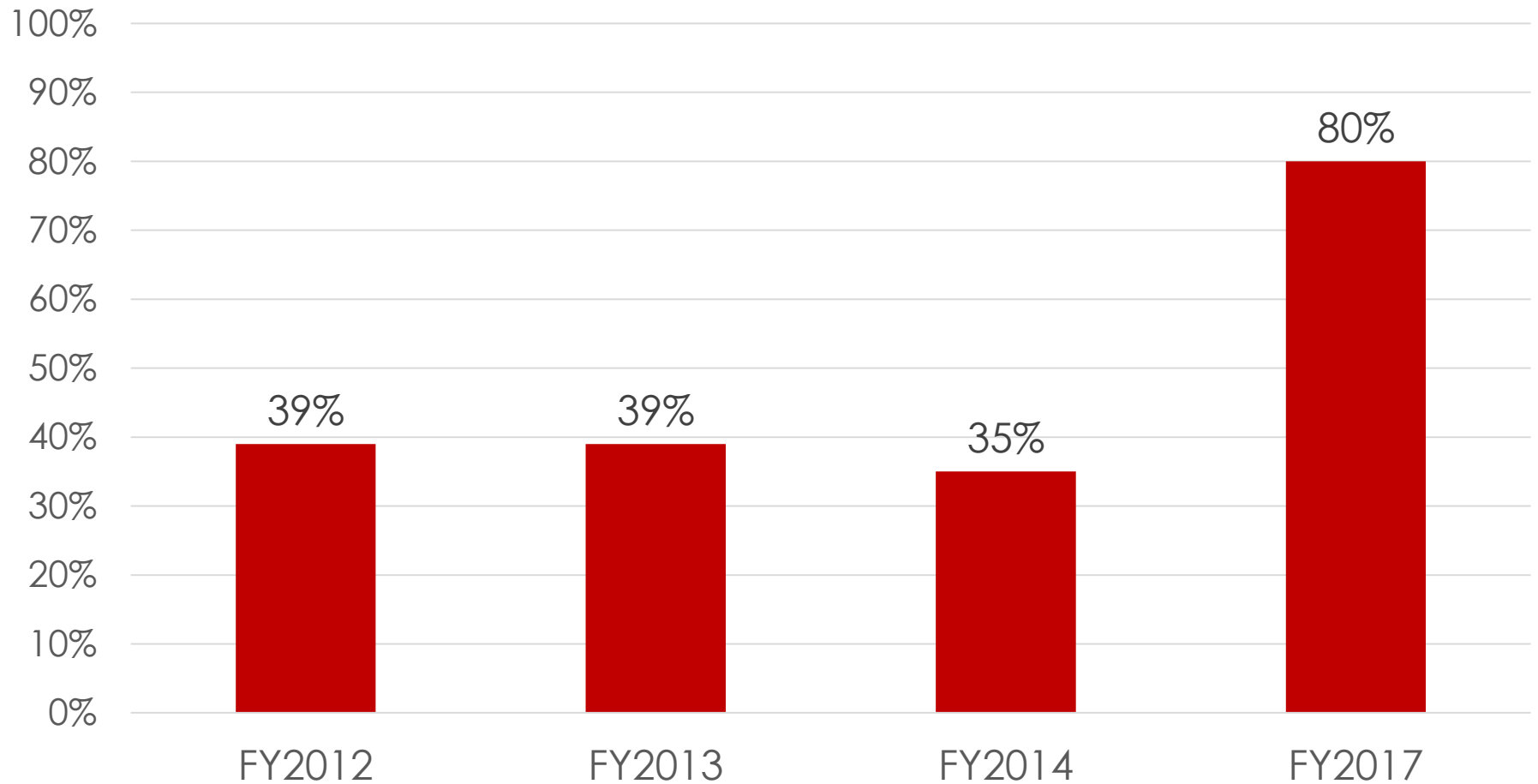
Shopping Malls/ Stores (Top 3)

FY2012	FY2013	FY2014	FY2017
62% ABC Stores 59% K-Mart 57% DFS Galleria	55% DFS Galleria 50% ABC 34% K-Mart	62% DFS Galleria 50% ABC 47% K-Mart	78% DFS Galleria 77% ABC 57% K-Mart

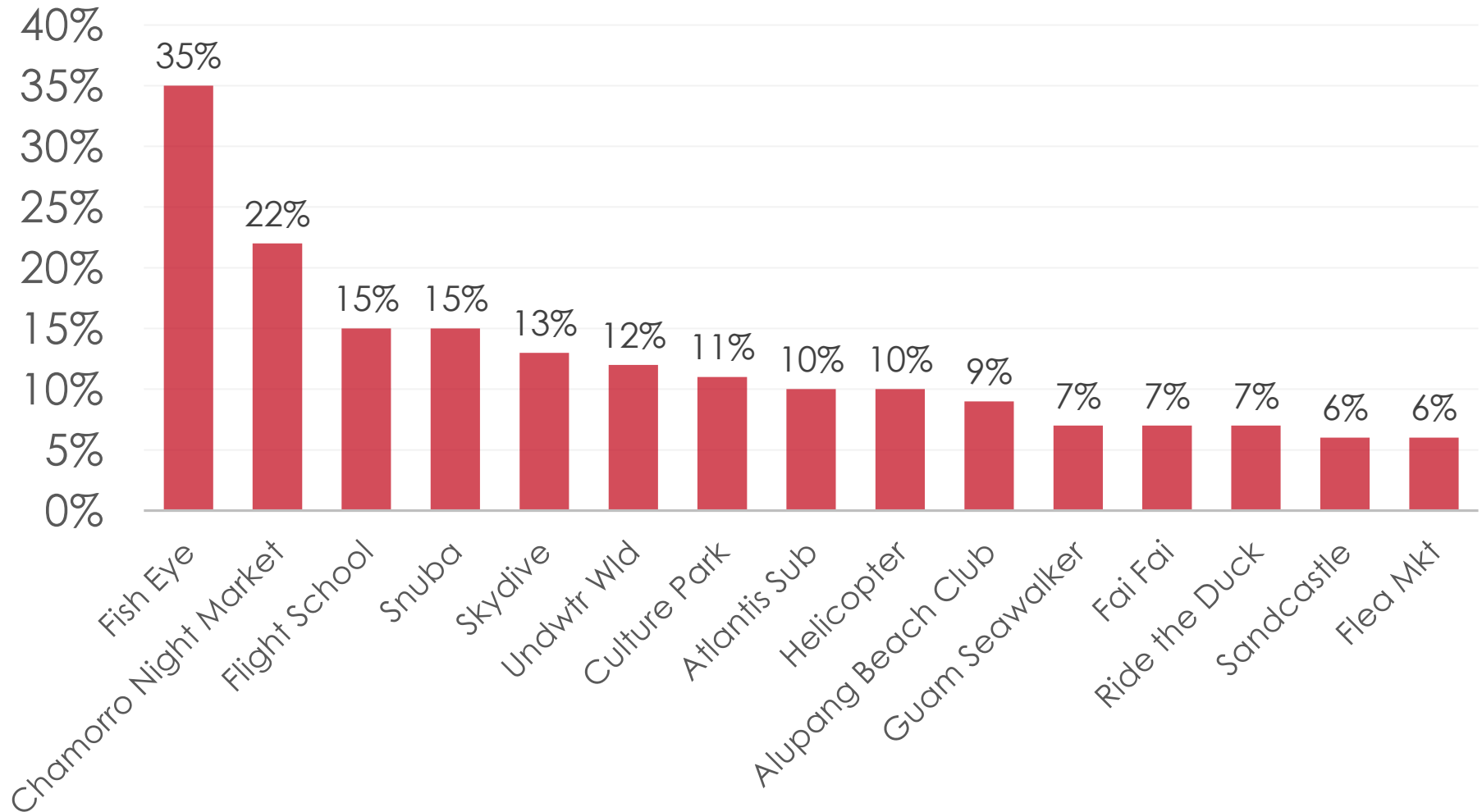
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – Tracking

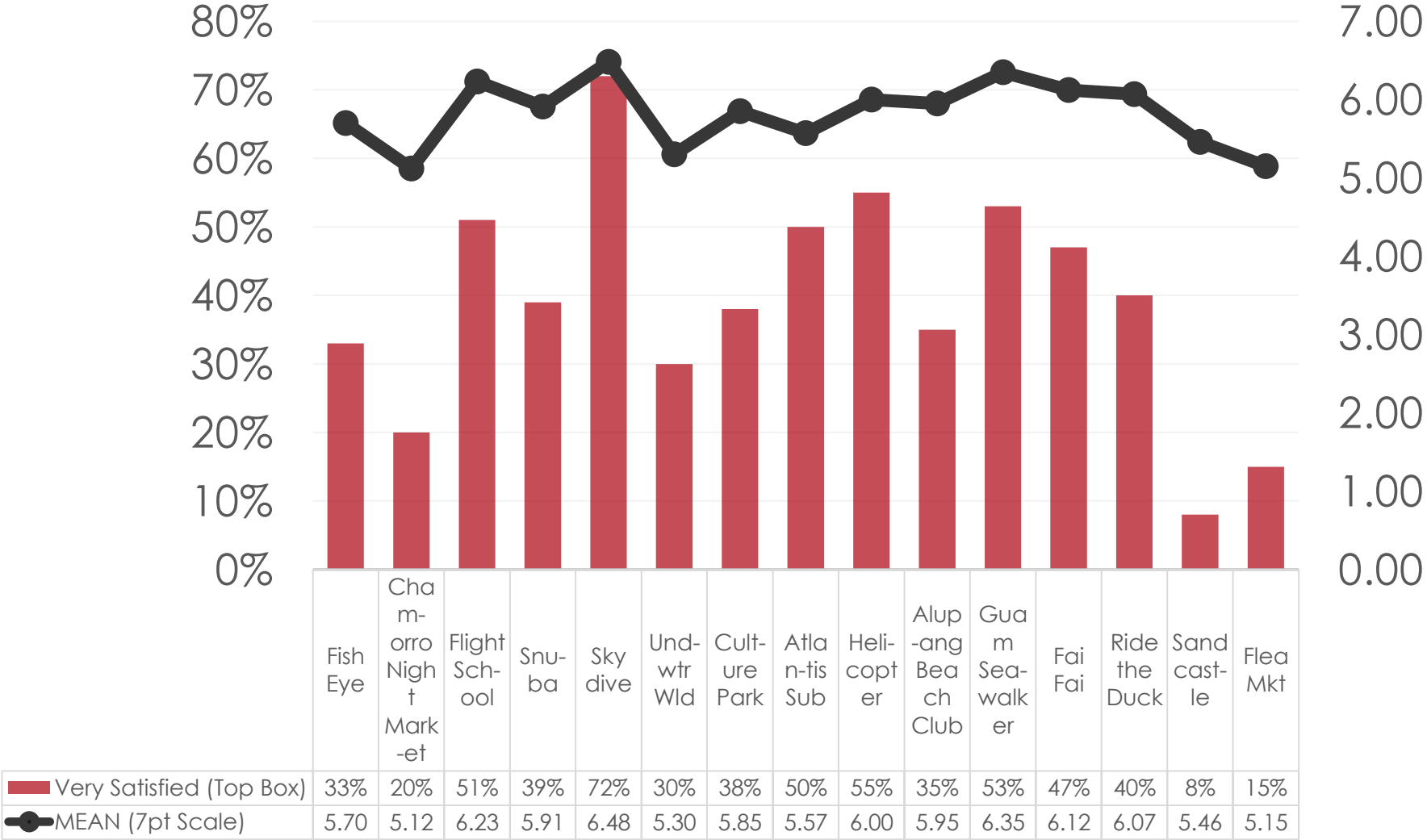


Optional Tour Participation (Top Responses) FY2017

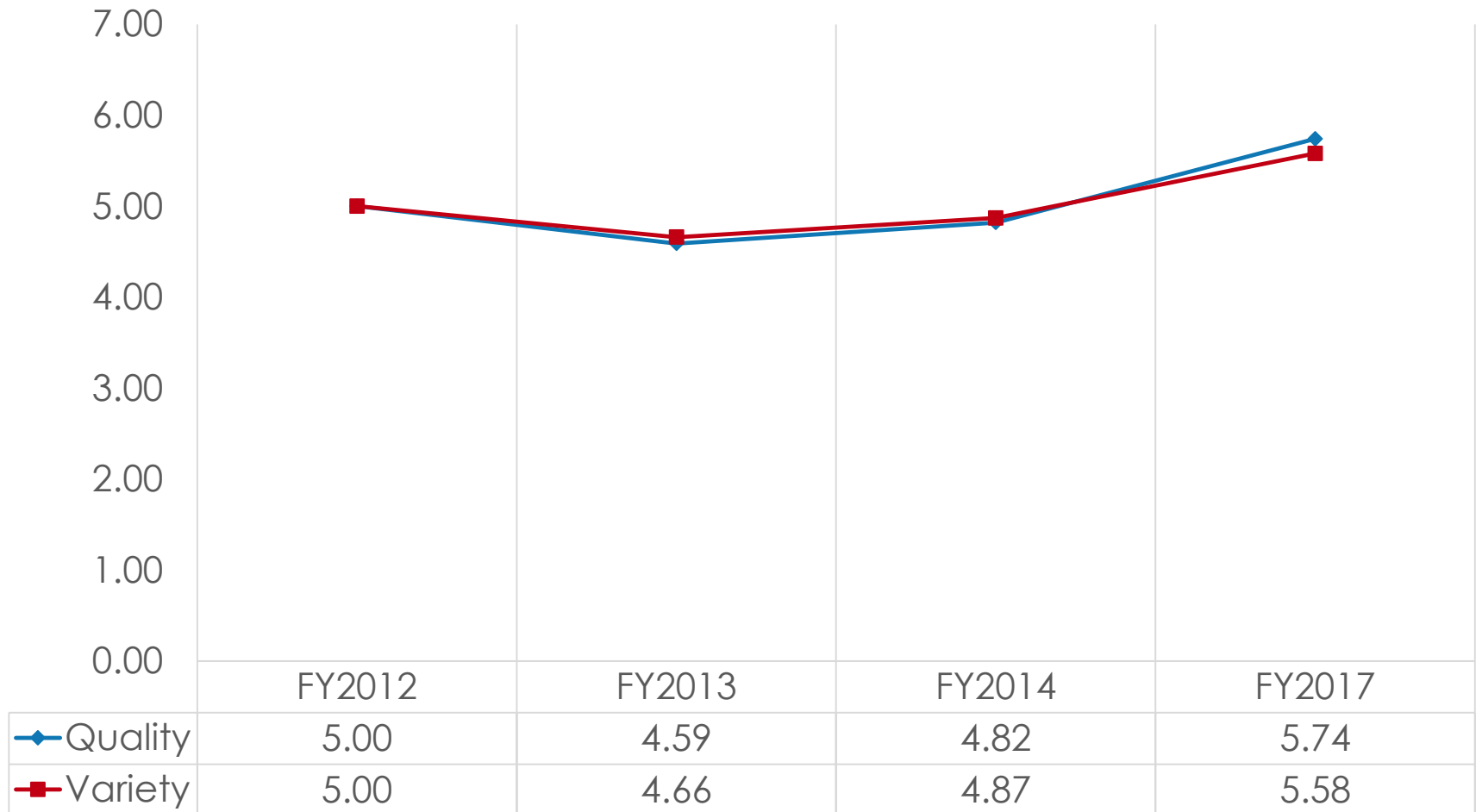


Optional Tour Satisfaction

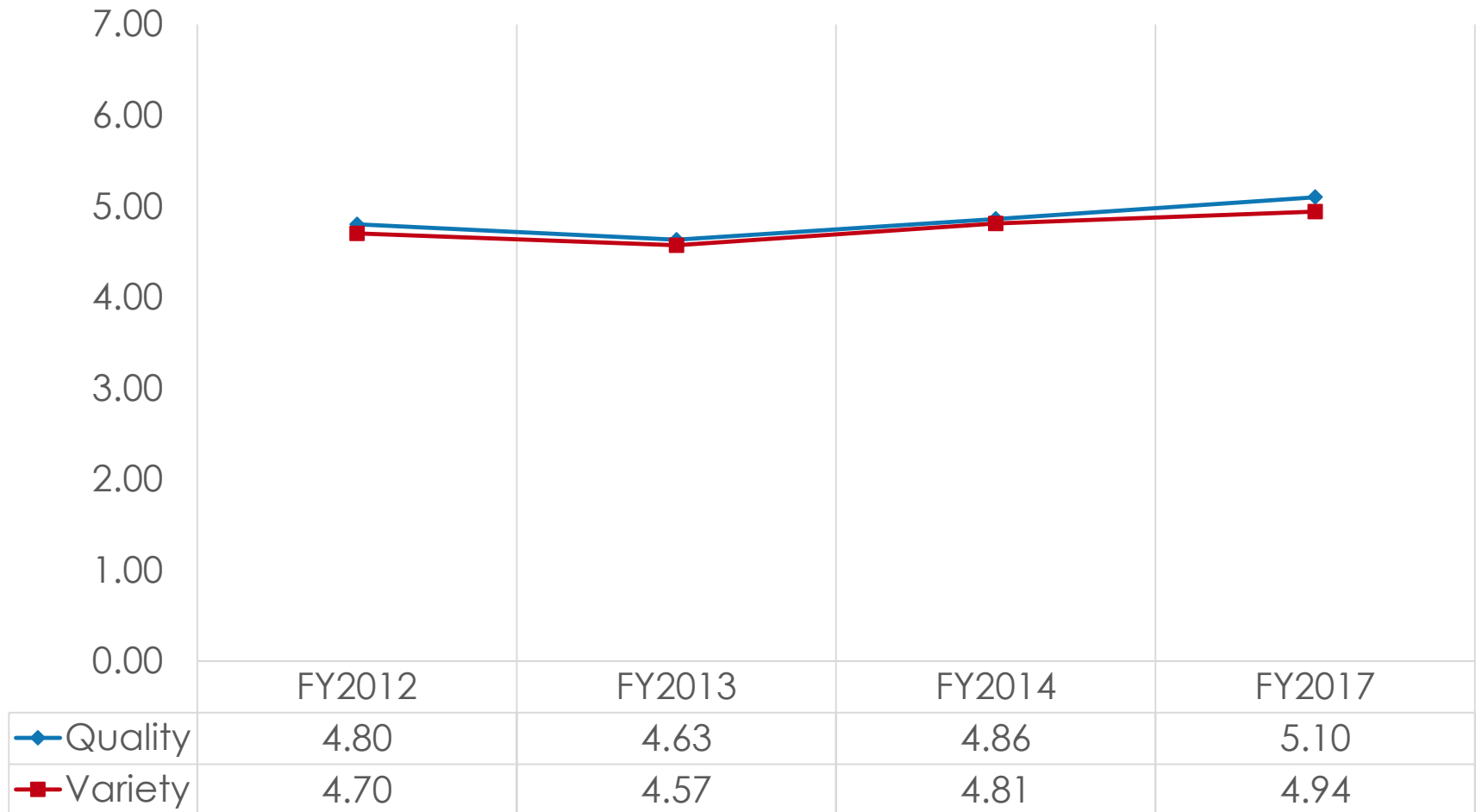
Top Responses only - Participation (5%+)



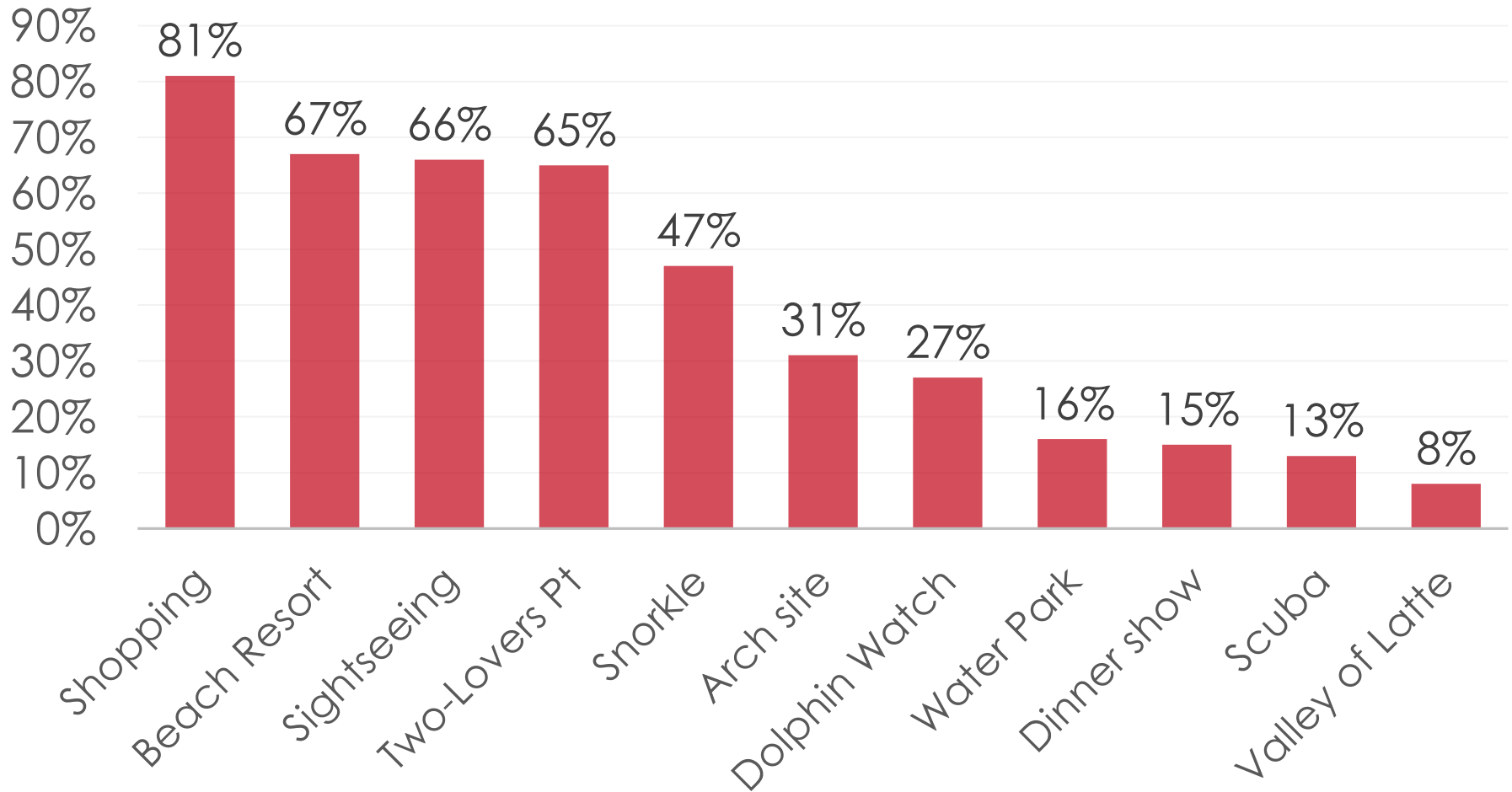
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION



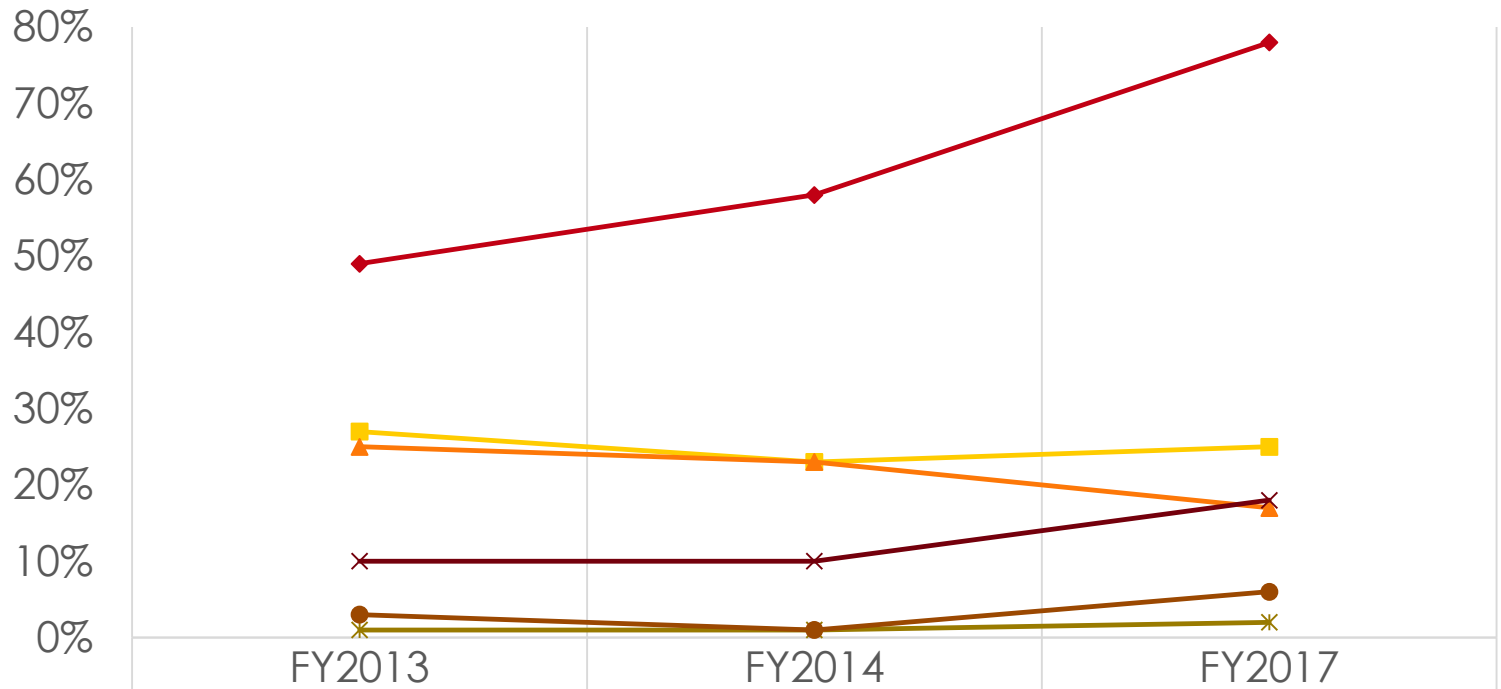
Activities Participation (Top Responses)



SECTION 5

PROMOTIONS

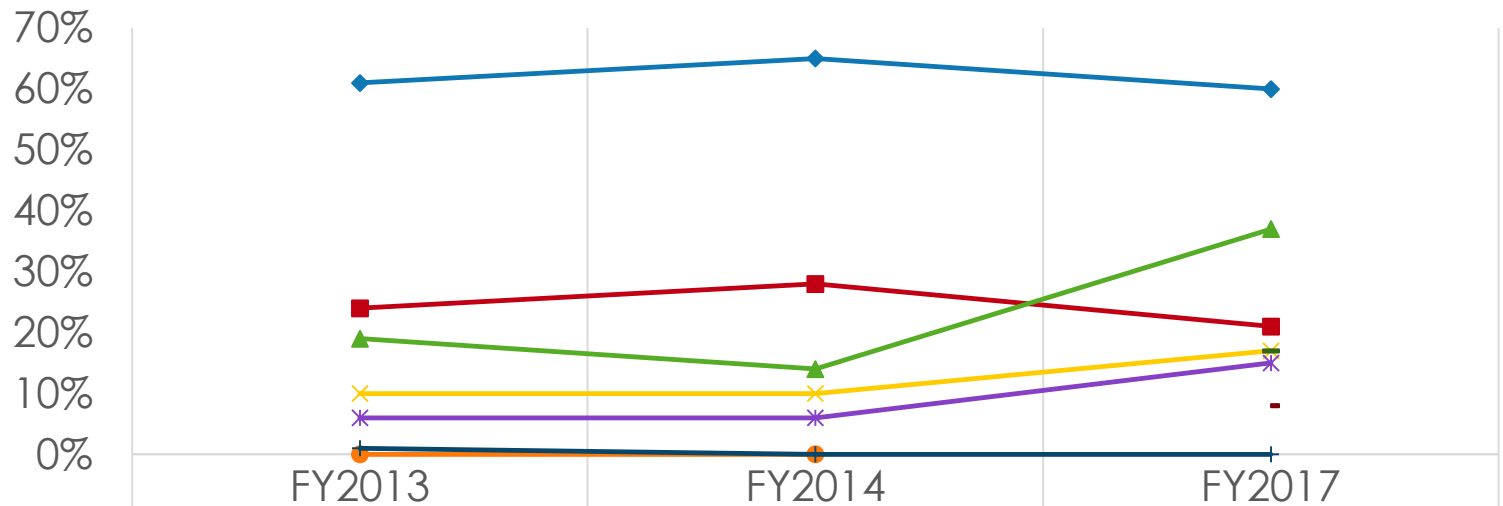
INTERNET- GUAM SOURCES OF INFORMATION



◆ Search Engines	FY2013	FY2014	FY2017
■ Blogs	49%	58%	78%
▲ Forums	27%	23%	25%
✕ Social Network	25%	23%	17%
* Other	10%	10%	18%
● Q&A Site	1%	1%	2%
	3%	1%	6%

INTERNET- SOURCES OF INFORMATION

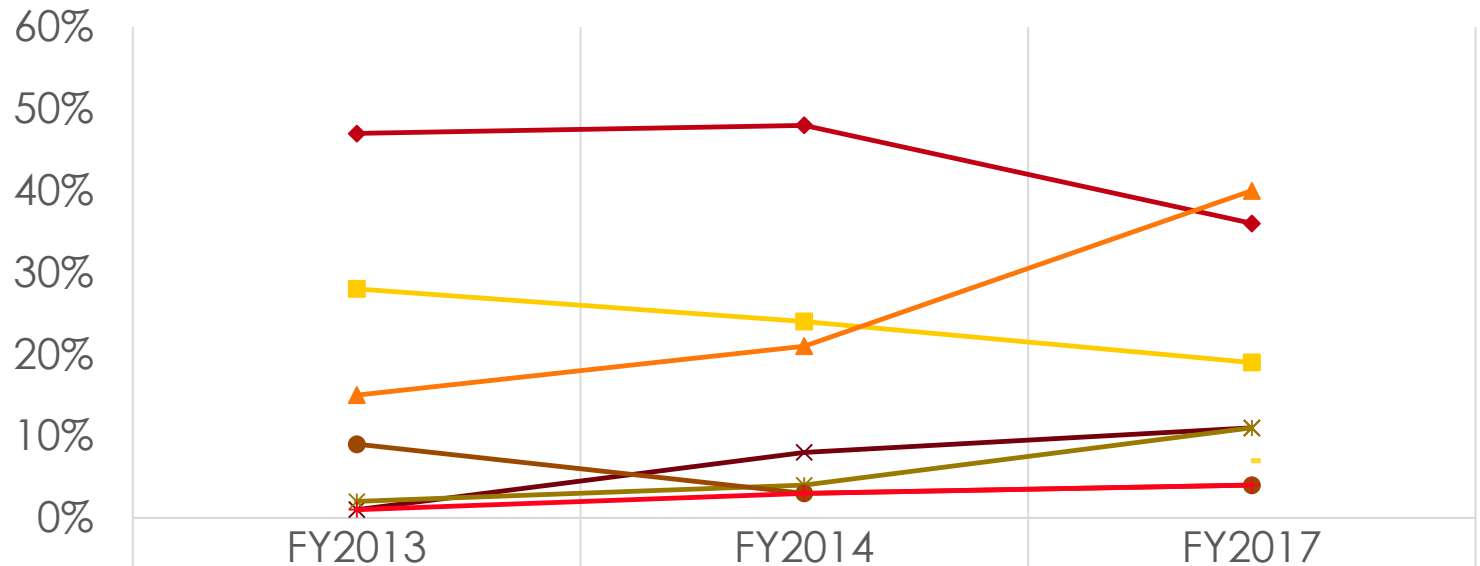
Things to do on Guam



Google	61%	65%	60%
Yahoo	24%	28%	21%
Baidu	19%	14%	37%
Facebook	10%	10%	17%
Weibo	6%	6%	15%
Twitter	0%	0%	
Naver	1%	0%	0%
Instagram2			8%
Online Booking			17%

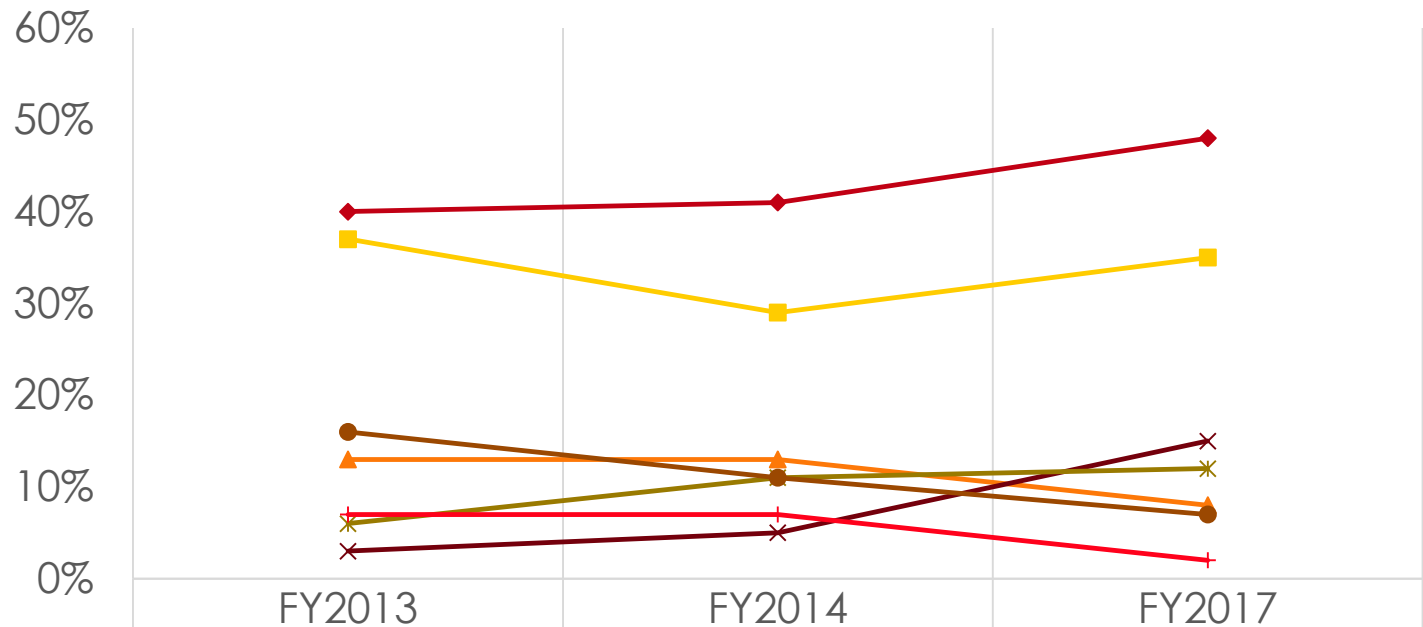
INTERNET- SOURCES OF INFORMATION

GVB



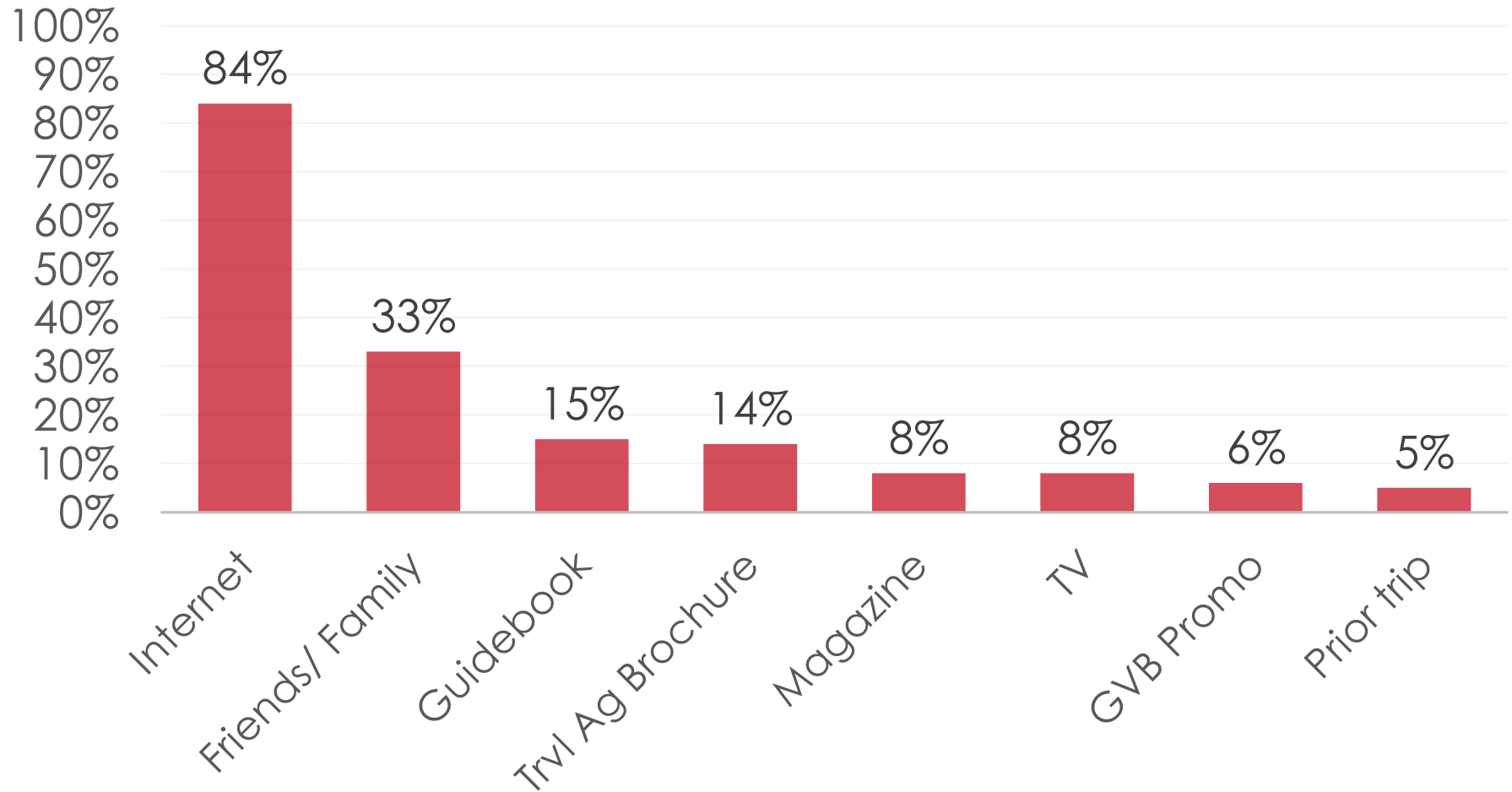
◆ None	47%	48%	36%
■ GVB Facebook	28%	24%	19%
▲ GVB Website	15%	21%	40%
✕ GVB Blog	1%	8%	11%
✱ GVB Sina Weibo	2%	4%	11%
● GVB Twitter	9%	3%	4%
✚ GVB Café	1%	3%	4%
— GVB Instagram			7%

TRAVEL MOTIVATION



◆ Friends/ Family	FY2013	40%	FY2014	41%	FY2017	48%
■ Internet	FY2013	37%	FY2014	29%	FY2017	35%
▲ Travel Agent	FY2013	13%	FY2014	13%	FY2017	8%
✕ Social media	FY2013	3%	FY2014	5%	FY2017	15%
* Travel shows	FY2013	6%	FY2014	11%	FY2017	12%
● Magazine	FY2013	16%	FY2014	11%	FY2017	7%
+ Company/ Bus Trip	FY2013	7%	FY2014	7%	FY2017	2%

PRE-ARRIVAL SOURCES OF INFORMATION

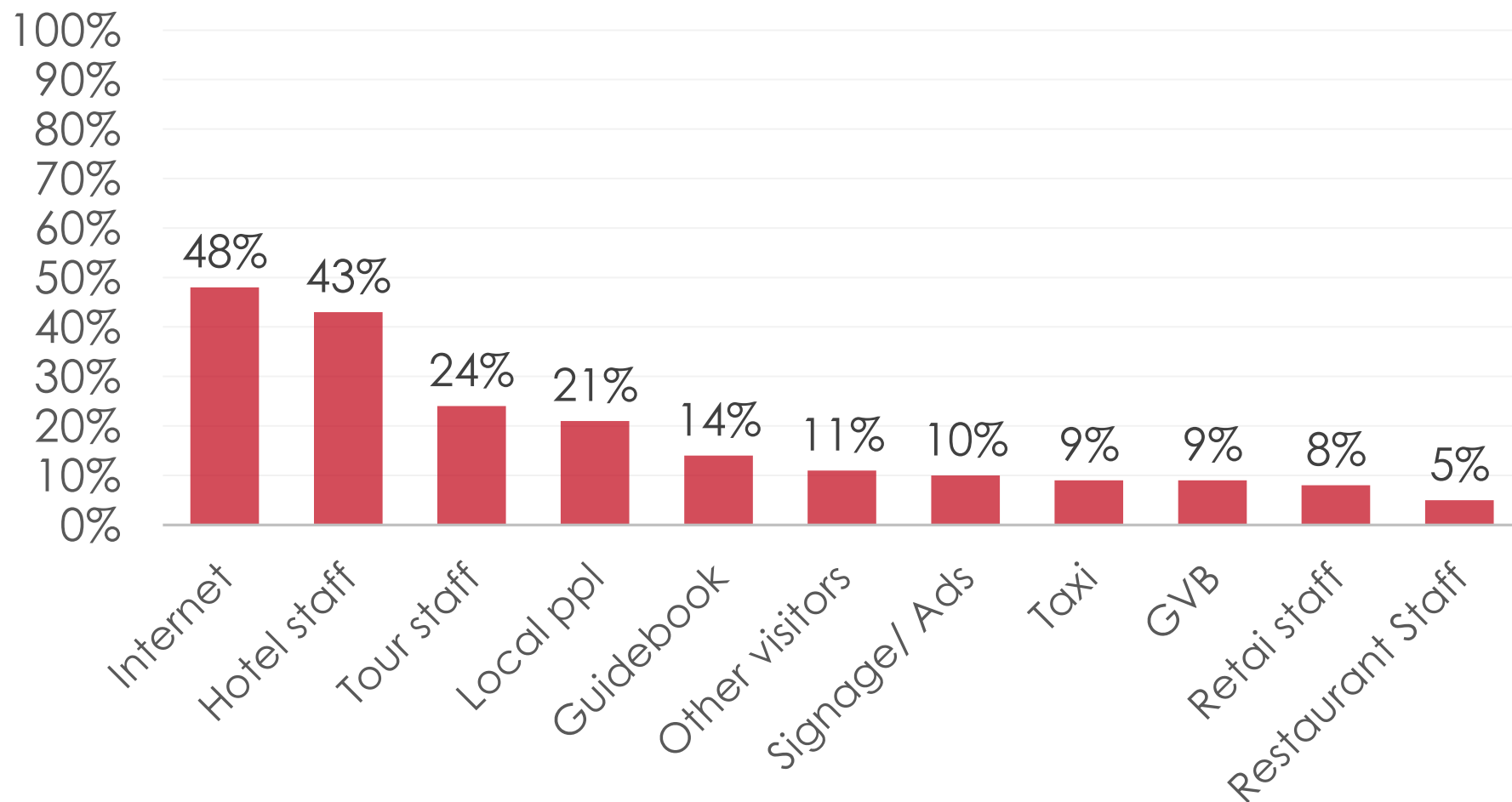


PRE-ARRIVAL SOURCES OF INFORMATION

FY2012	FY2013	FY2014	FY2017
65% Internet 7% Company 6% Recom	67% Internet 22% Recom 4% Prior trip	59% Internet 15% Recom 5% Company	84% Internet/ App 33% Recom 15% Guidebook

ONISLE

SOURCES OF INFORMATION



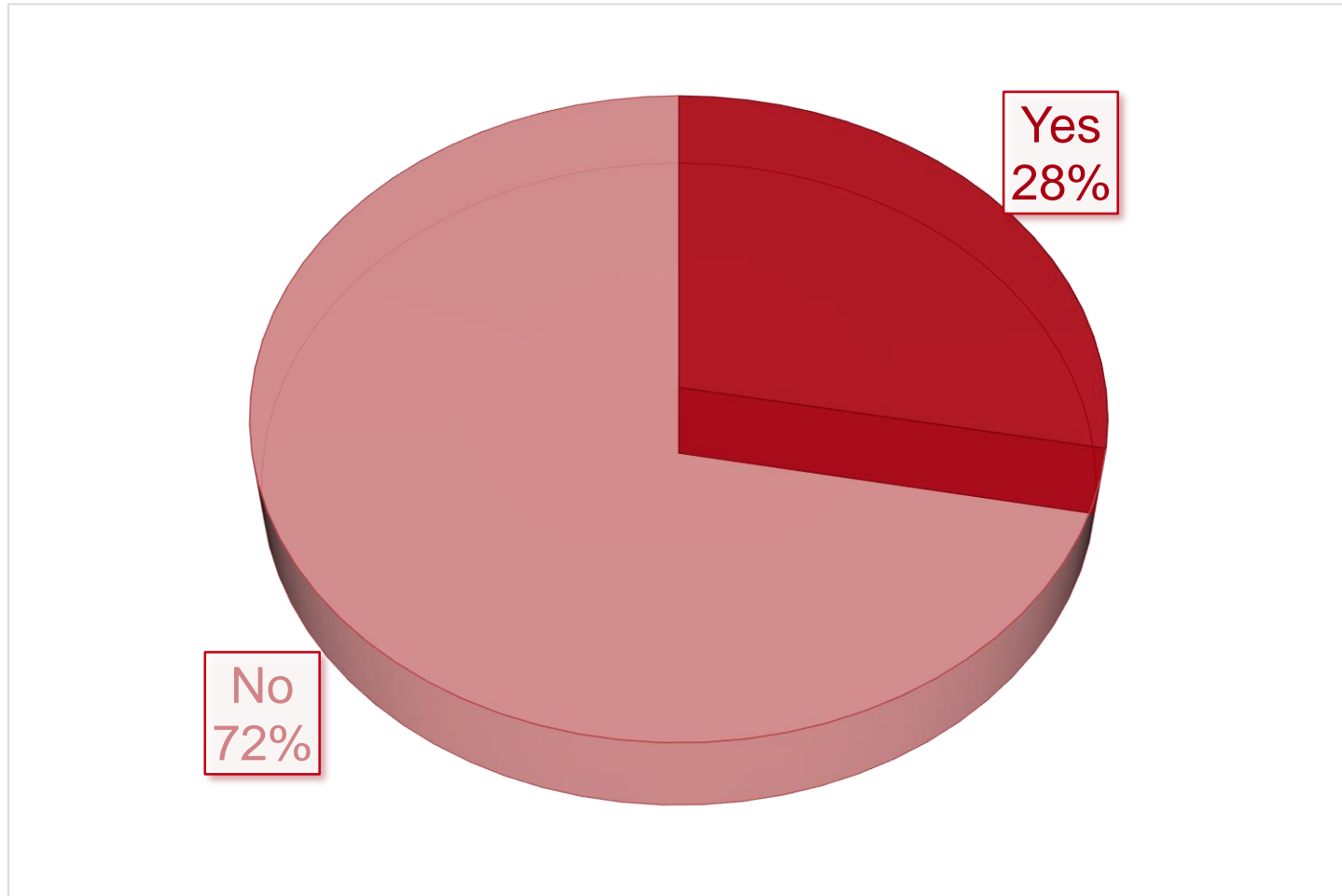
ON-ISLE SOURCES OF INFORMATION

FY2012	FY2013	FY2014	FY2017
34% Hotel staff 15% Tour staff 11% Visitor Ch	28% Hotel staff 16% Internet 12% Tour staff	26% Internet 20% Hotel staff 16% Tour staff	48% Internet/ App 43% Hotel staff 24% Tour staff

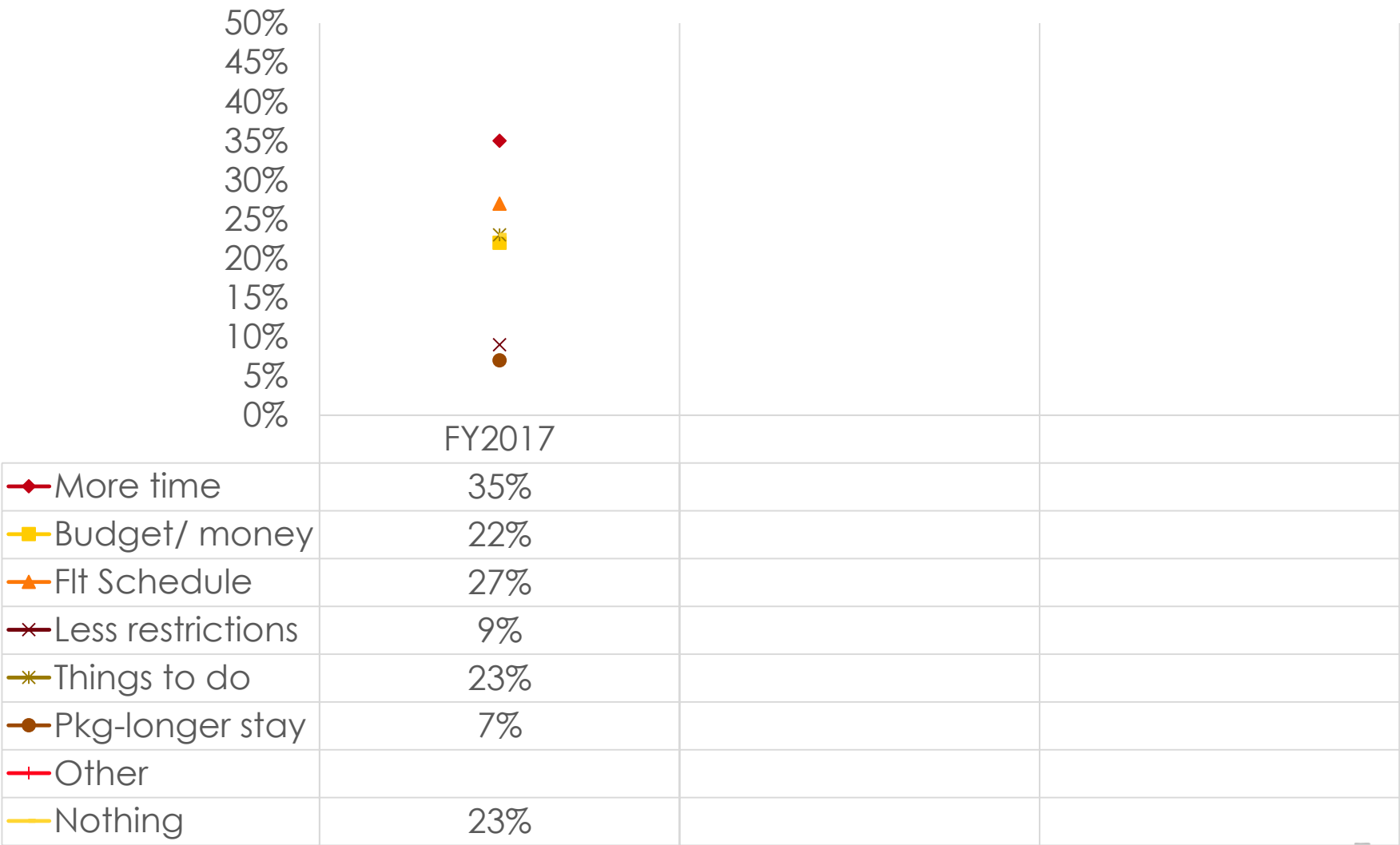
SECTION 6

FUTURE TRAVEL TO GUAM

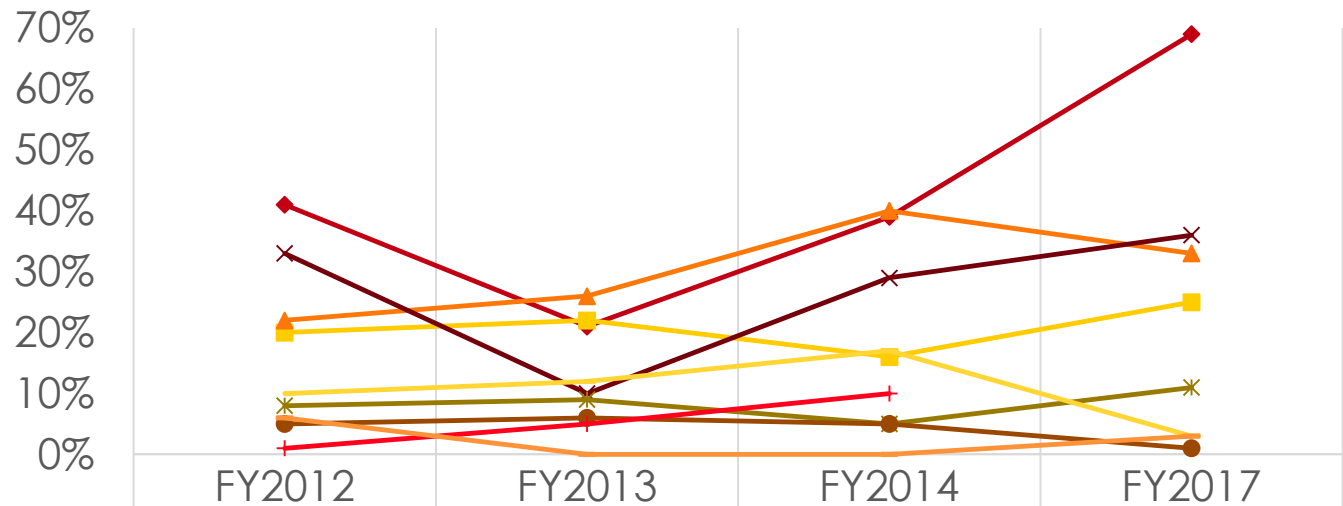
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



FUTURE TRAVEL CONCERNS

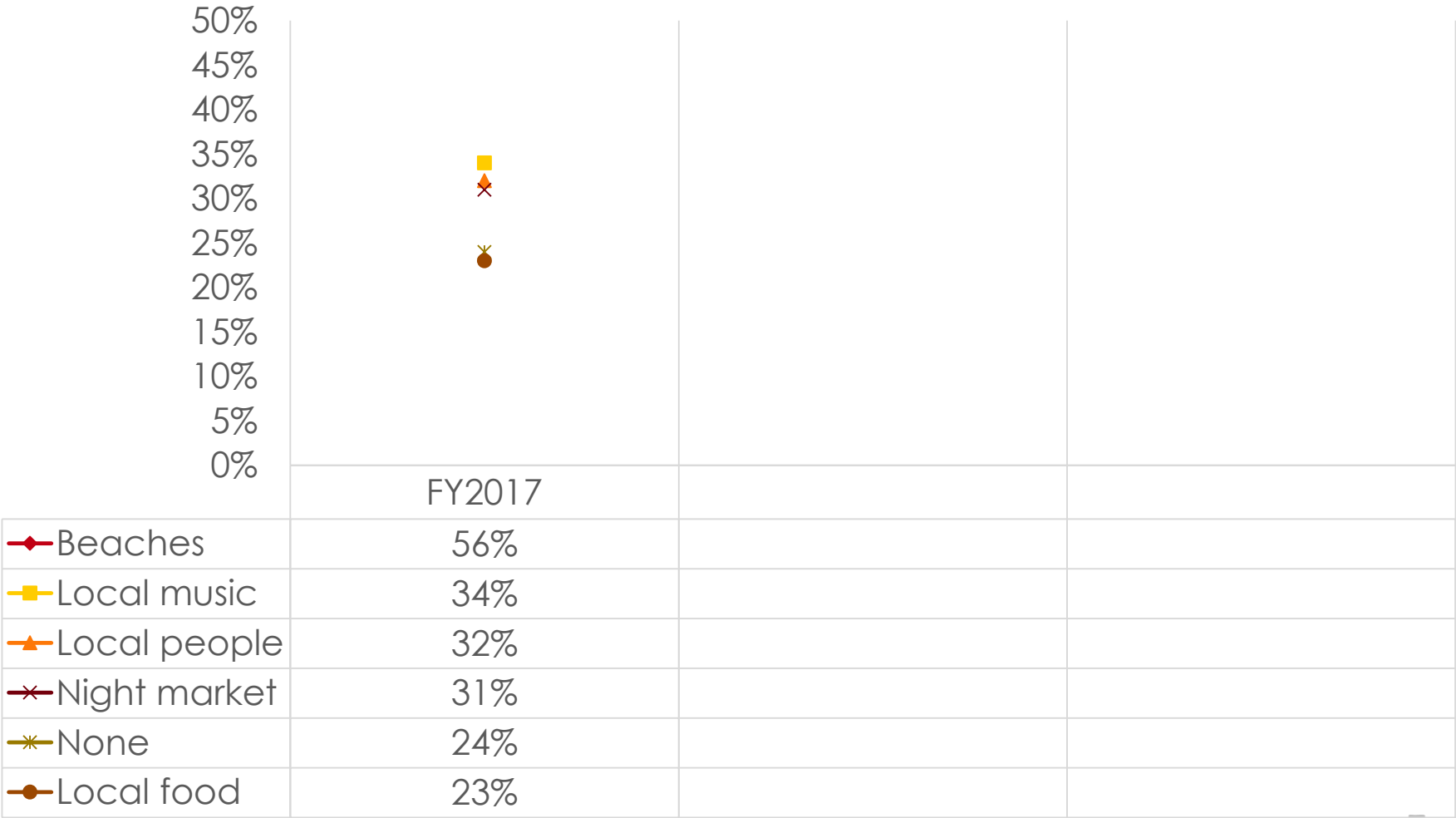


◆ Safety	41%	21%	39%	69%
■ Terrorism	20%	22%	16%	25%
▲ Food	22%	26%	40%	33%
✕ Expense	33%	10%	29%	36%
* Discrimination	8%	9%	5%	11%
● Should spend at home	5%	6%	5%	1%
+ Other	1%	5%	10%	
— Don't know	10%	12%	17%	3%
— No concerns	6%	0%	0%	3%

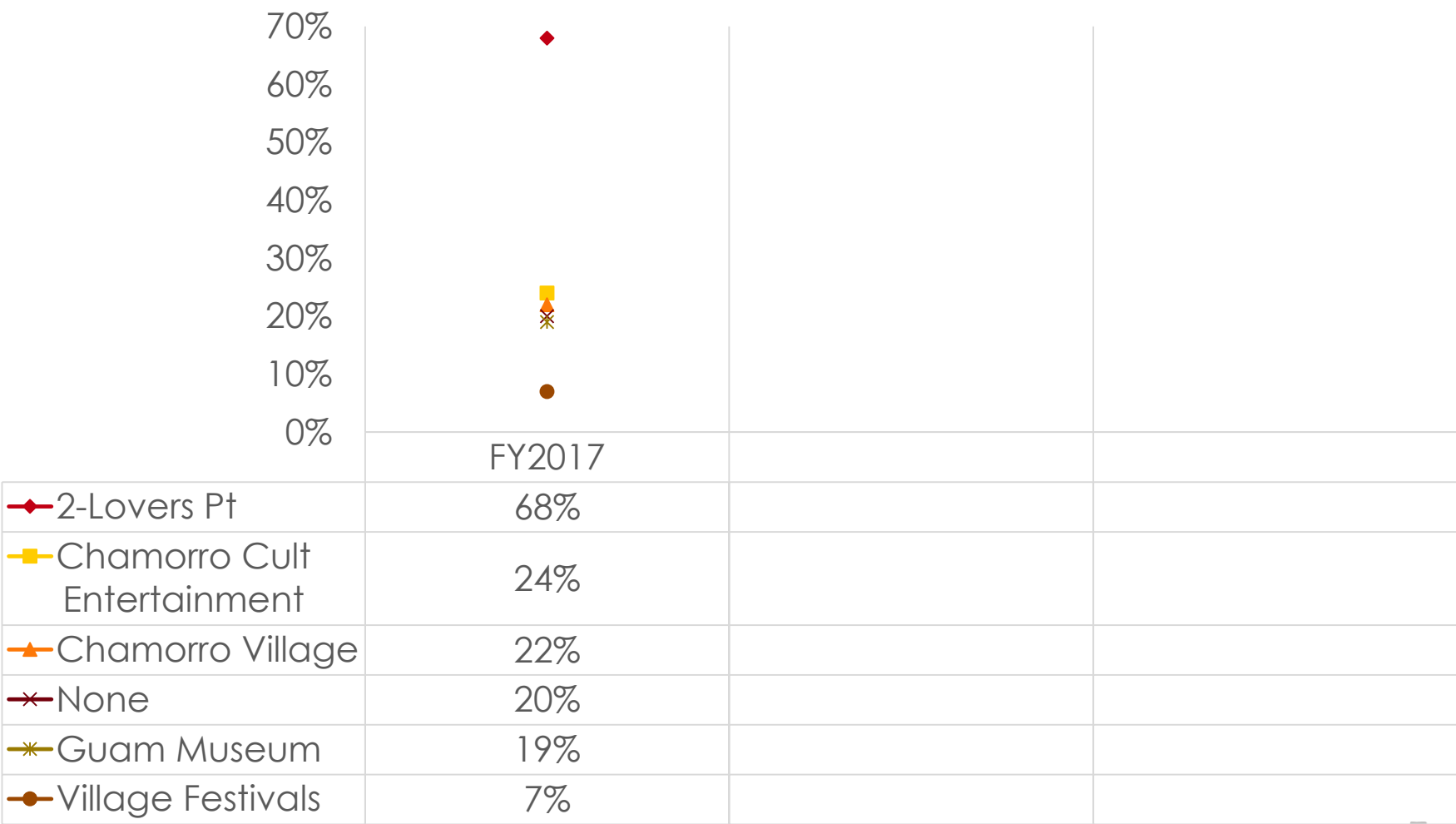
SECTION 7

GUAM CULTURE

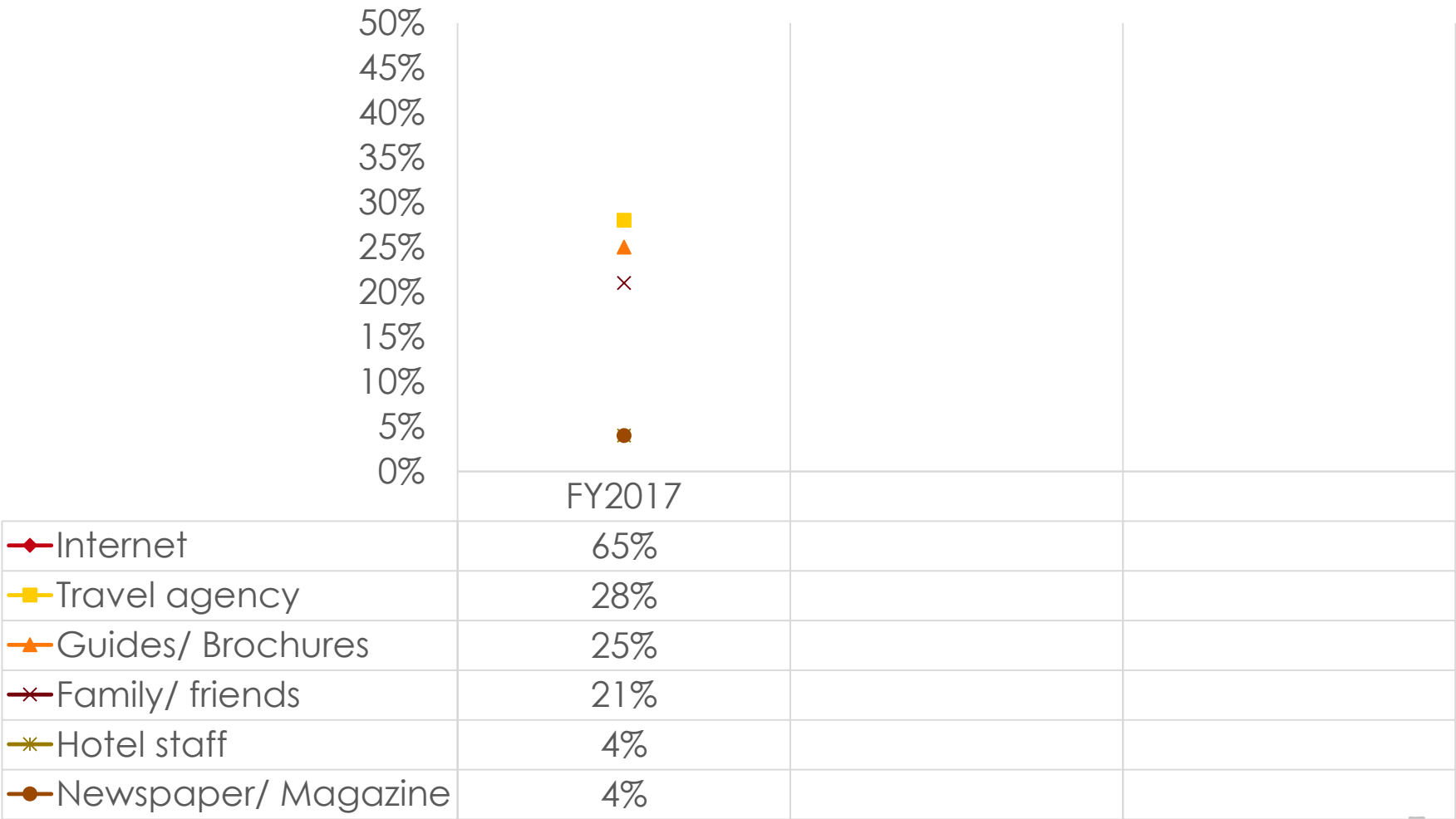
EXPERIENCED- CHAMORRO/ HAFA ADAI SPIRIT



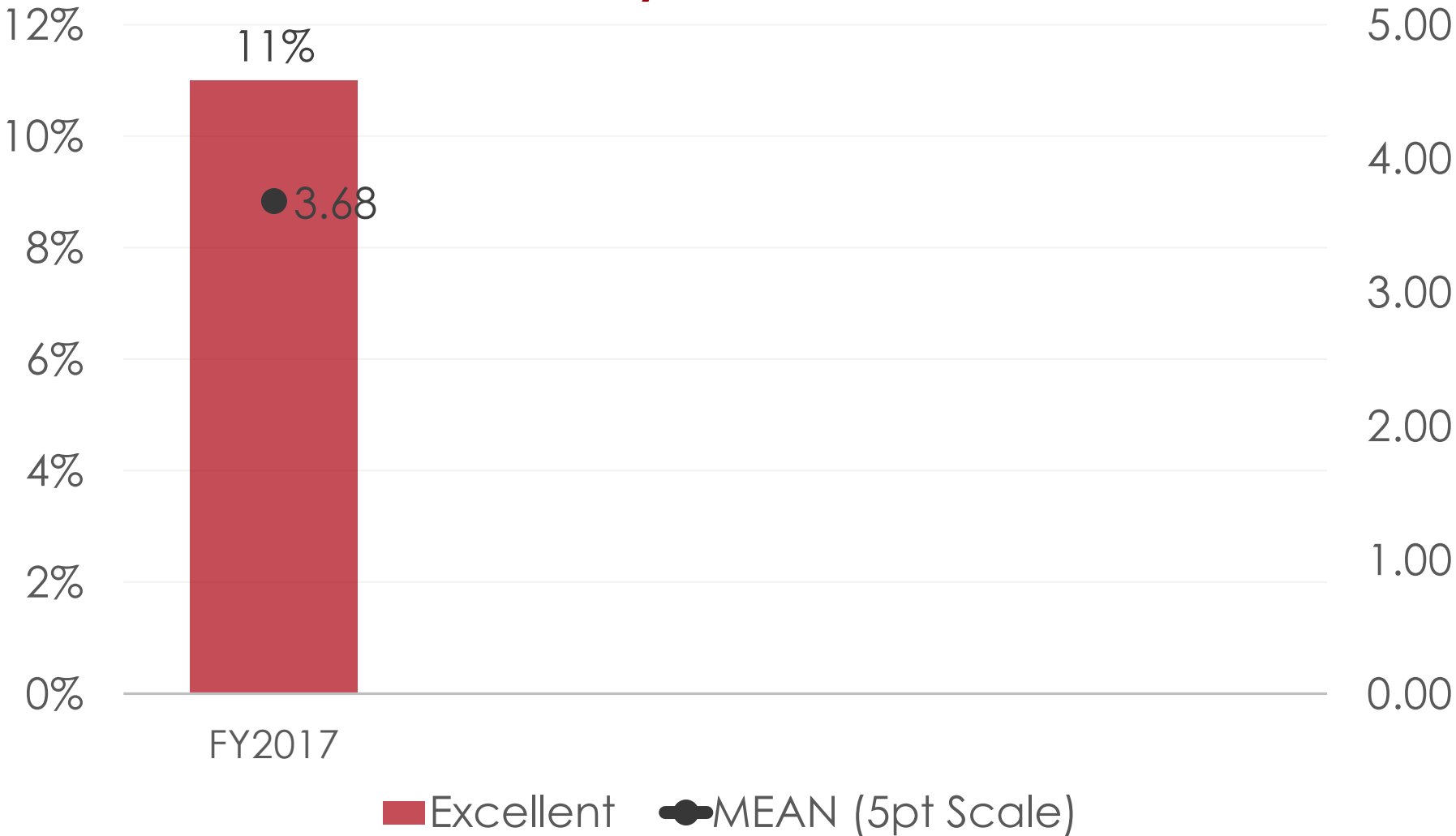
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



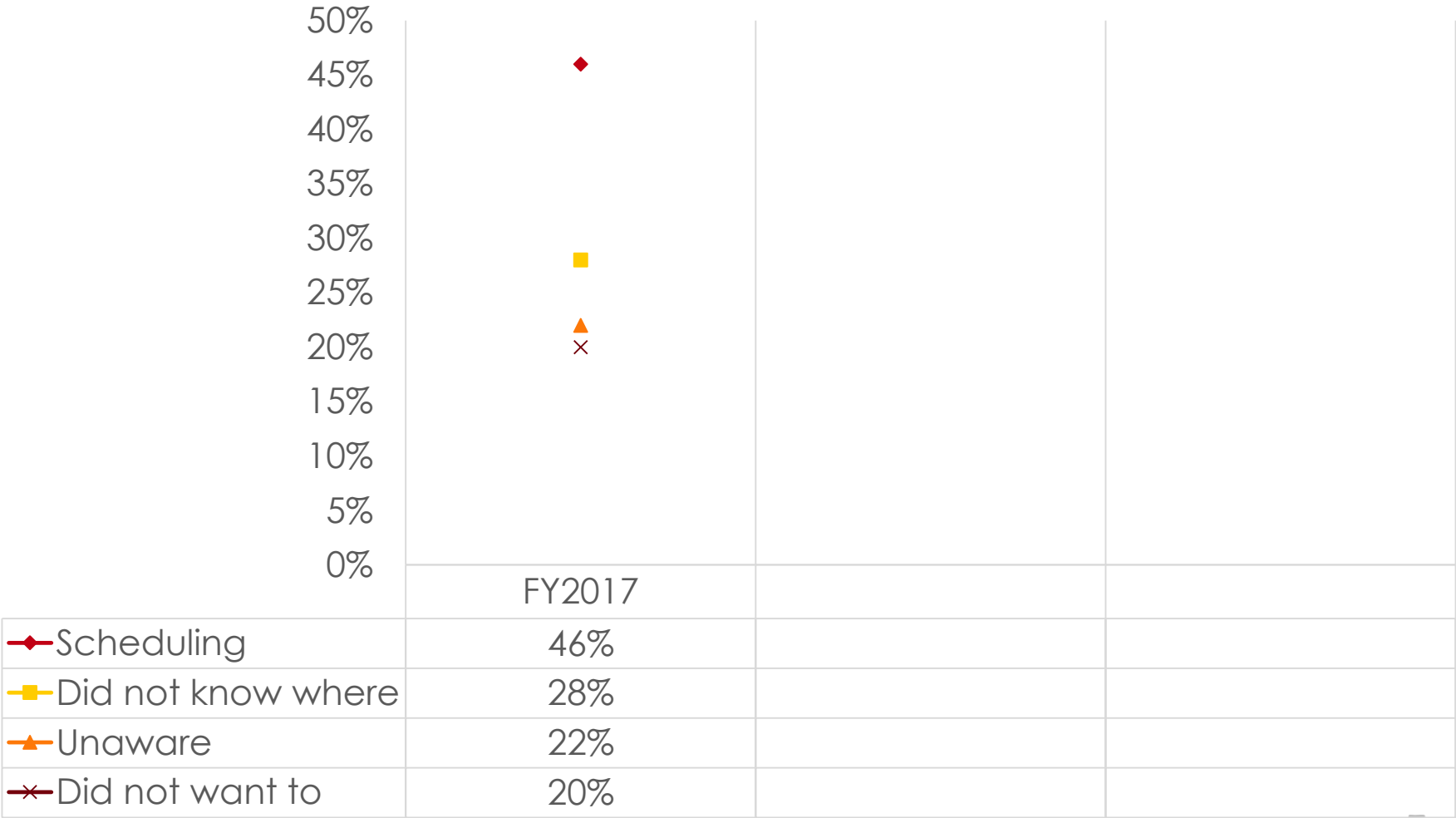
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



SATISFACTION- CULTURAL ACTIVITY/EVENTS



OBSTACLES- CULTURAL ACTIVITY/EVENTS



ADVANCED STATISTICS

Analysis Technique

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

Drivers of Overall Satisfaction

Comparison of Drivers of Overall Satisfaction, Overall Annual 2017	
Drivers:	Annual 2017 rank
Quality & Cleanliness of beaches & parks	
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	1
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	3
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	
Quality of ground handler	2
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	41.9%
NOTE: Only significant drivers are included.	

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Hong Kong visitor's experience on Guam is driven by three significant factors in the 2017 Period. By rank order they are:
 - **Quality of day time tours,**
 - **Quality of ground handler, and**
 - **Quality of shopping.**
- With all three factors the overall r^2 is .419 meaning that **41.9% of overall satisfaction is accounted for by these factors.**

Drivers of On-isle Expenditures

Comparison of Drivers of Per Person On Island Expenditure, Overall Annual 2017	
Drivers:	Annual 2017 rank
Quality & Cleanliness of beaches & parks	
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	0.0%
NOTE: Only significant drivers are included.	

Drivers of On-isle Expenditures

- **Per Person On Island Expenditure** of Hong Kong visitors on Guam is driven by no significant factors in the 2017 period