

# Guam Visitors Bureau

## Hong Kong Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

QTR.4 (JULY - SEPT 2017)

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 **122** departing Chinese 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 **122** is +/- 8.87 percentage points with a 95% confidence level. That is, if all Chinese 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 +/- 8.87 percentage points.

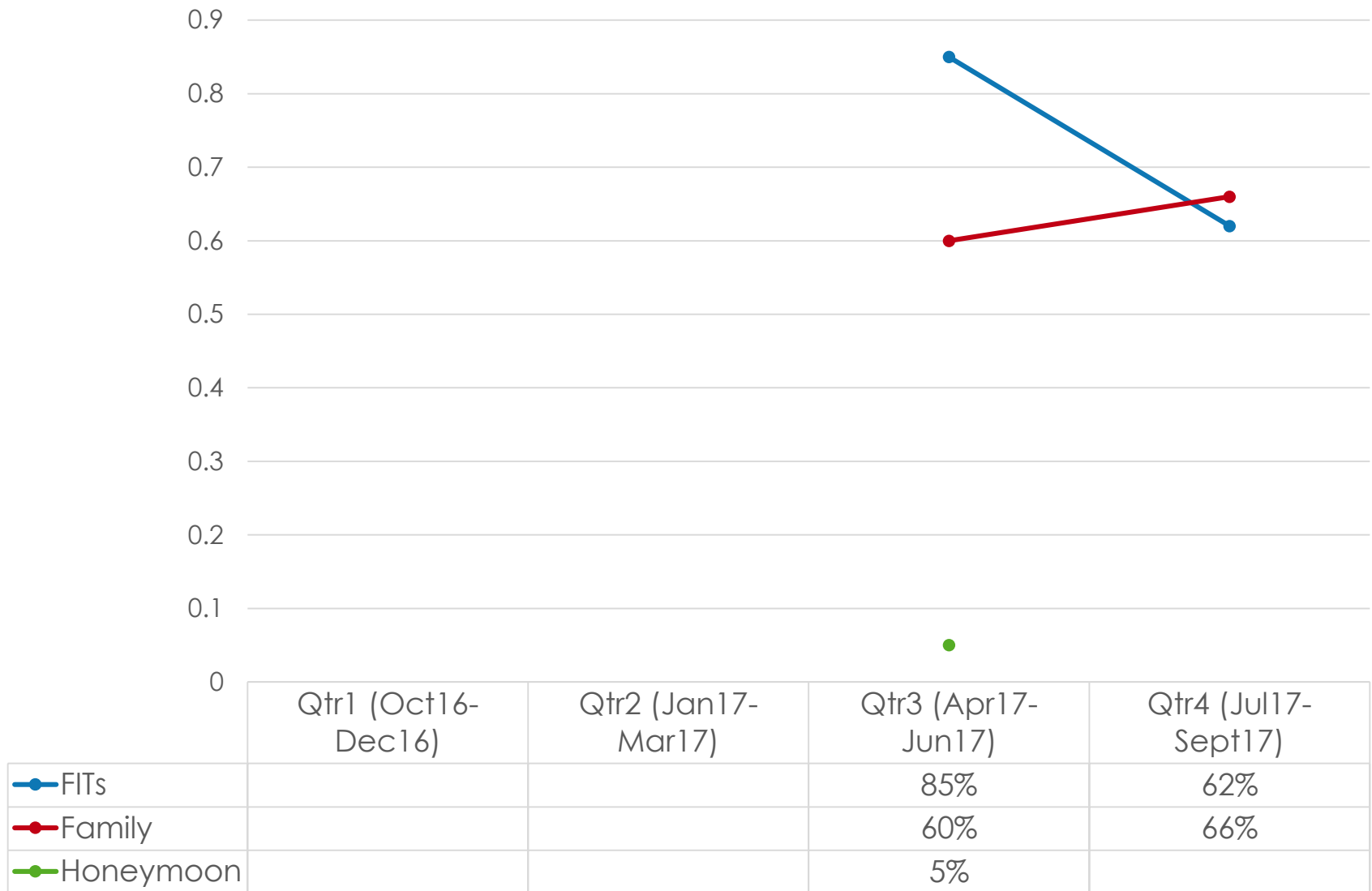
# Objectives

- To monitor the effectiveness of the Hong Kong seasonal campaigns in attracting Chinese 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 Chinese visitors) the most important determinants of on-island spending

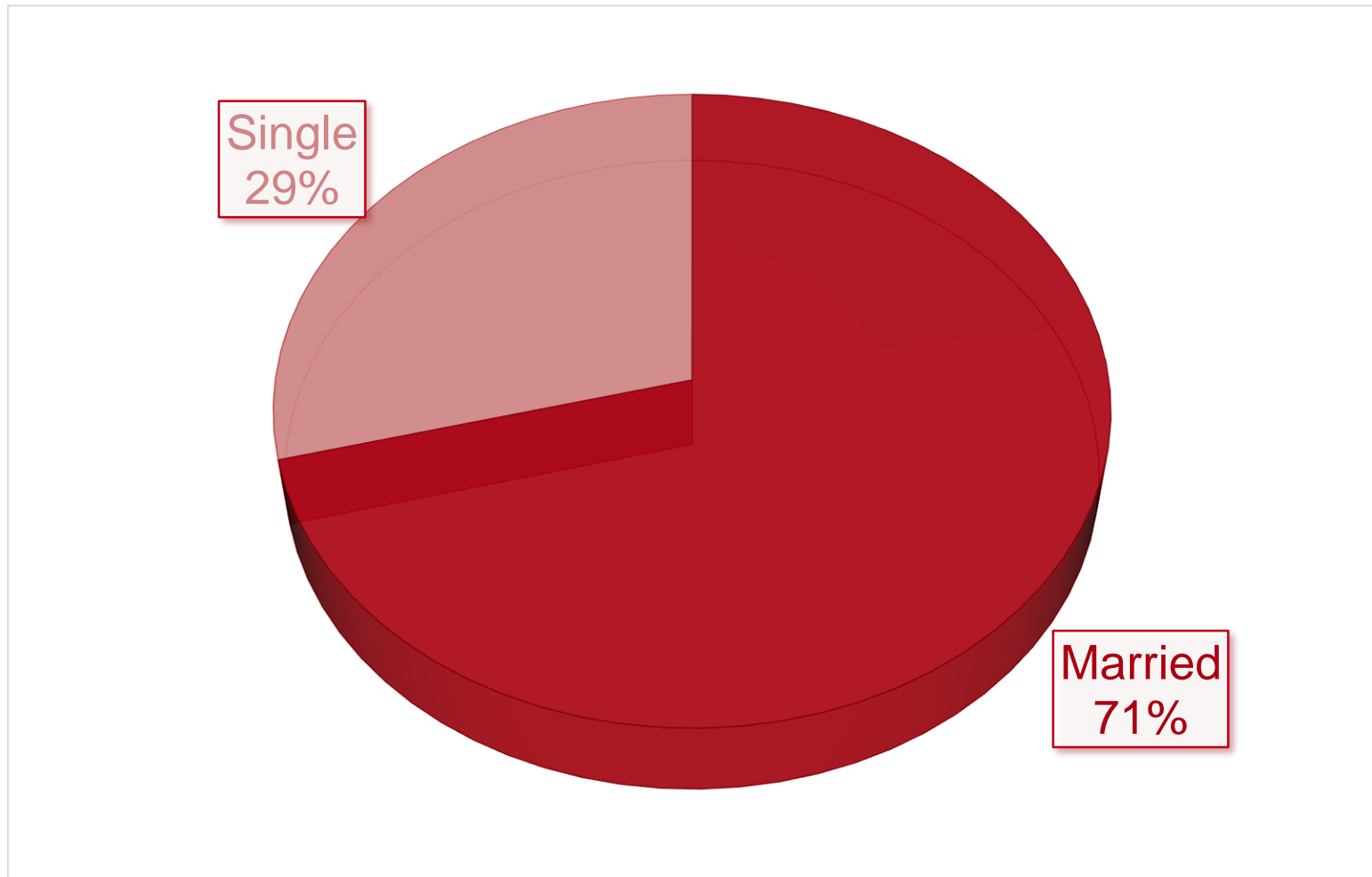
# Key Highlighted Segments



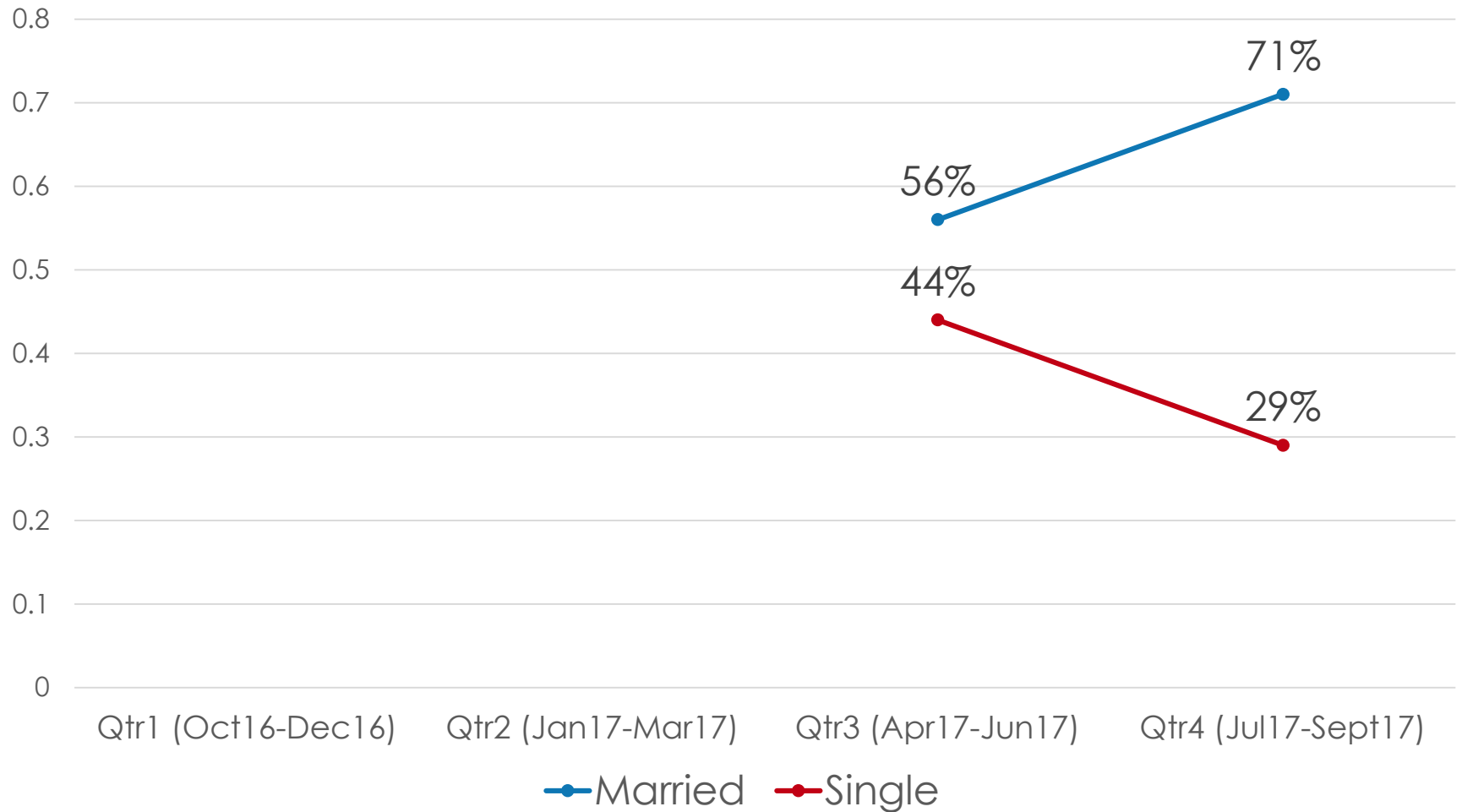
# SECTION 1

## PROFILE OF RESPONDENTS

# Marital Status



# Marital status – FY2017 Tracking





# Marital status – Key Segments

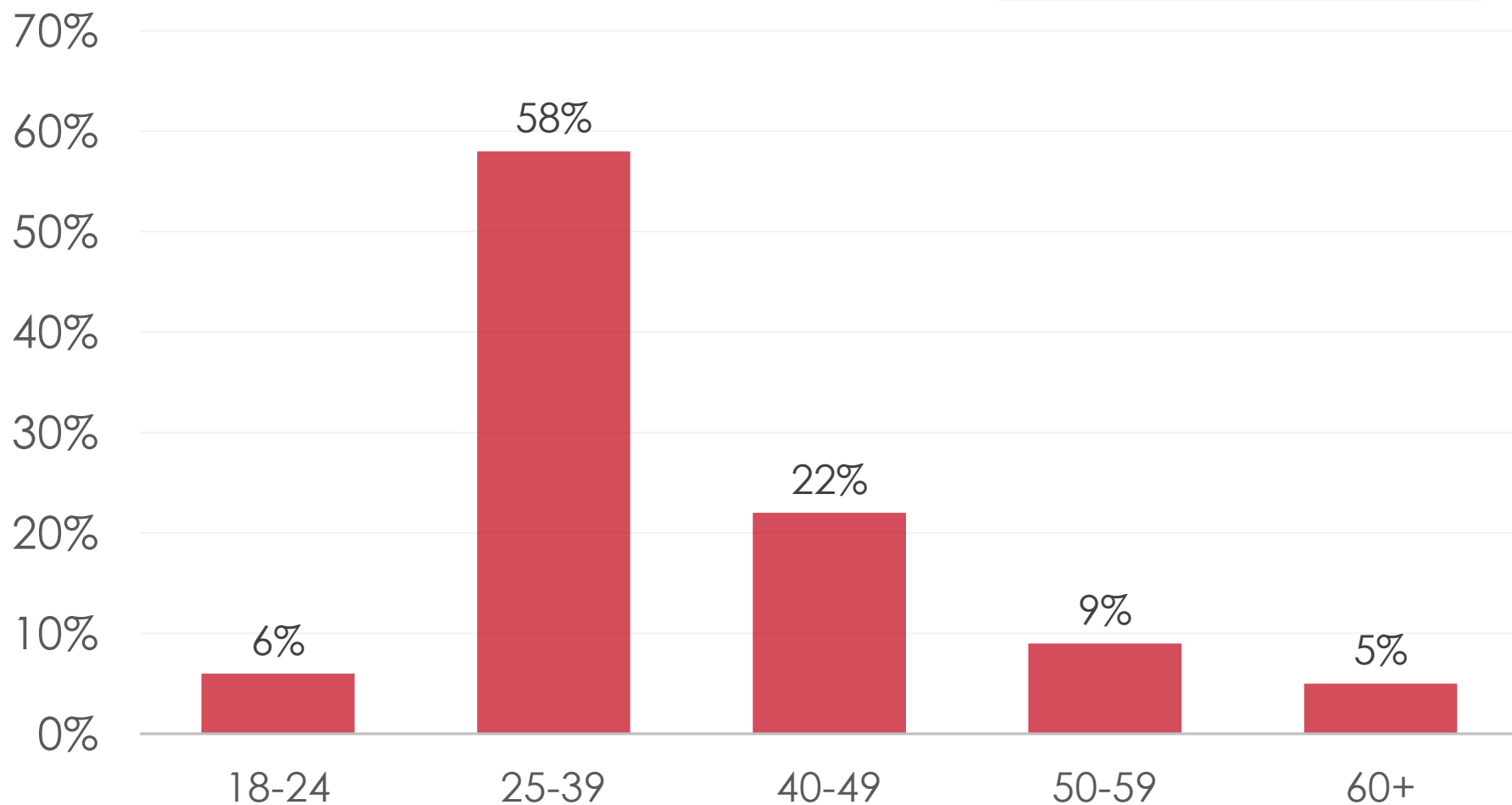
**GVB EXIT SURVEY  
QE MARITAL STATUS**

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
QE	Married	71%	64%	90%	
	Single	29%	36%	10%	
	Total	122	76	81	

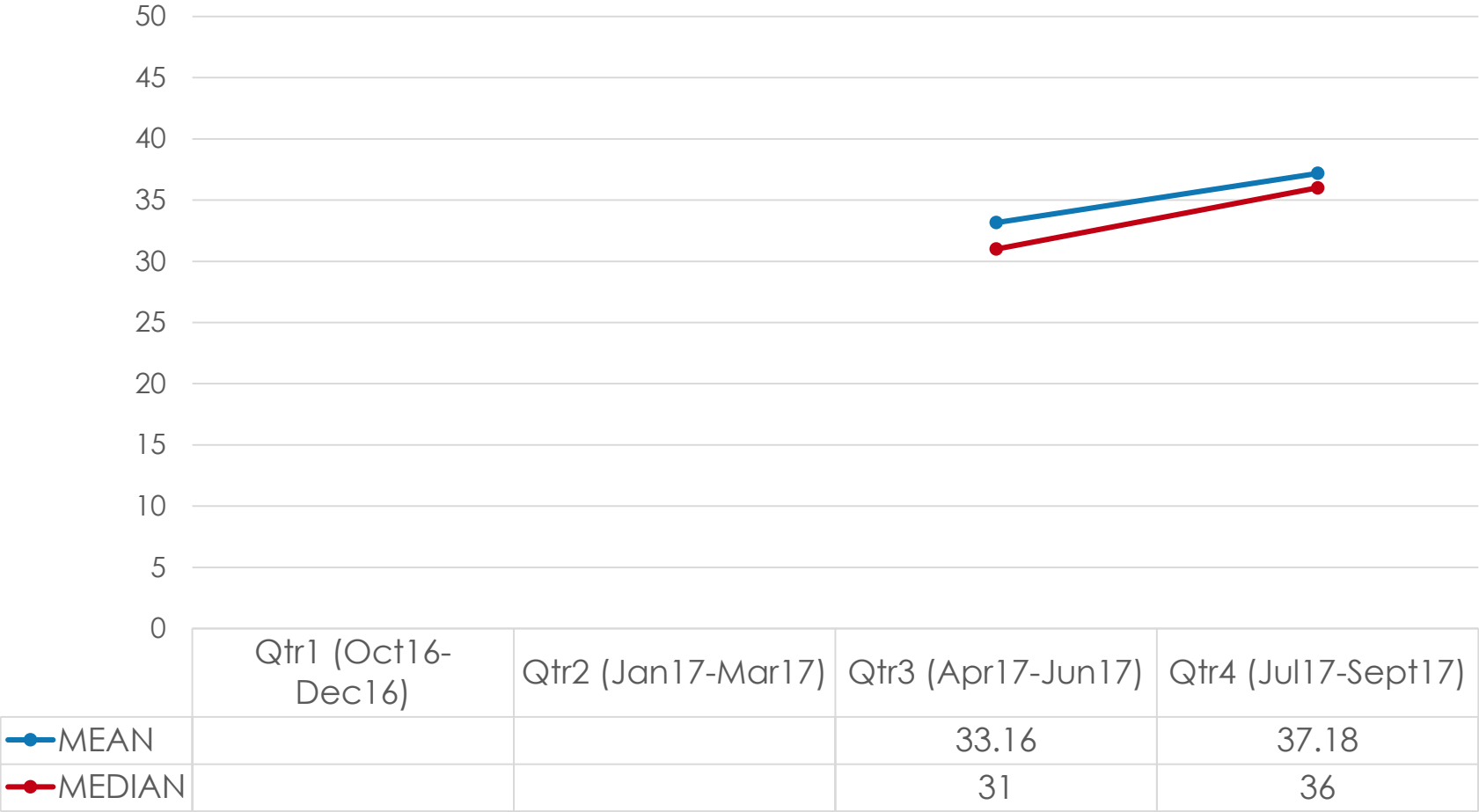
Prepared by Anthology Research

# Age

MEAN = 37.18  
MEDIAN = 36



# Age – FY2017 Tracking



# Age – Key Segments

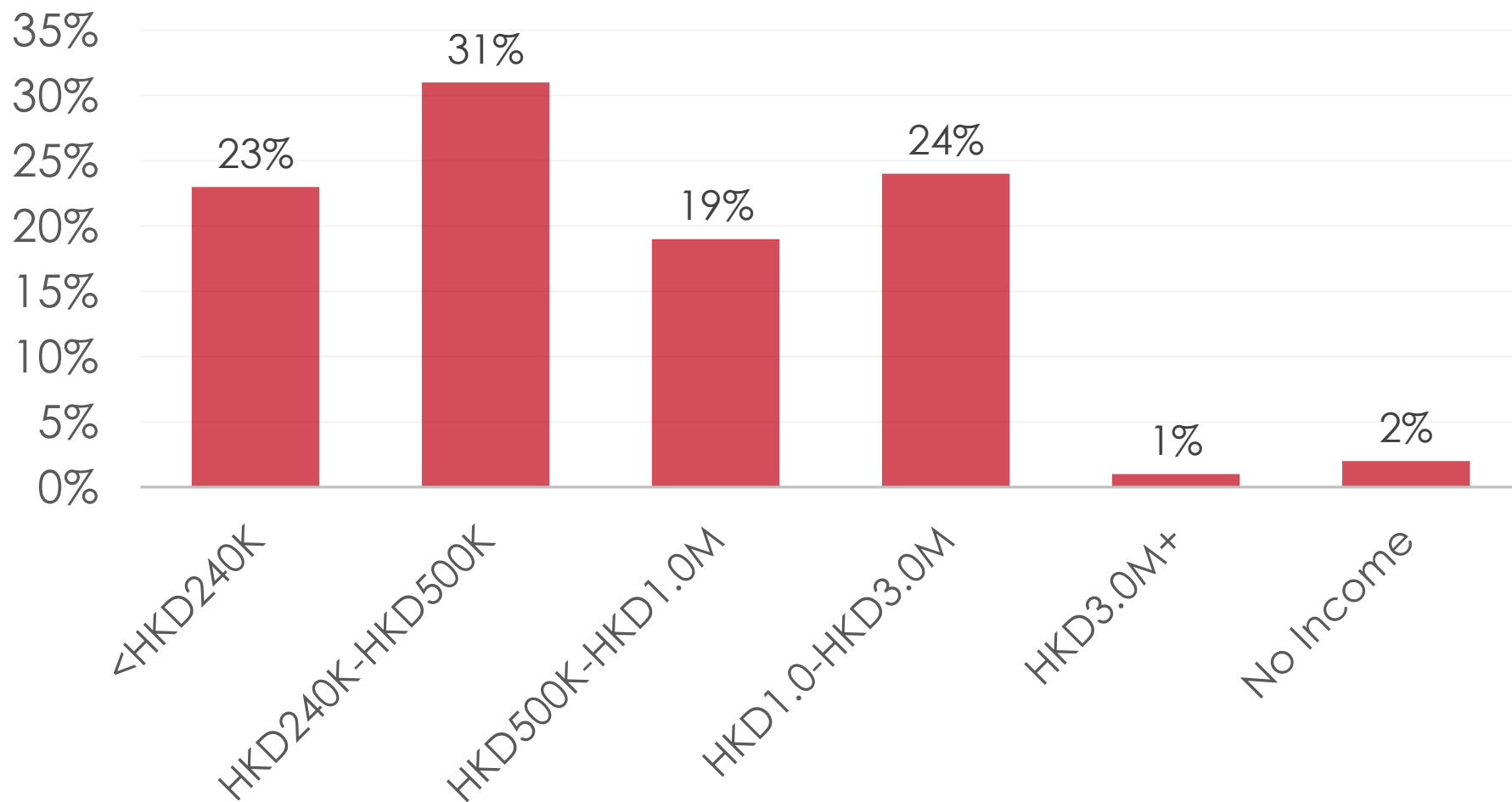
**GVB EXIT SURVEY  
AGE**

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
SD	18-24	6%	7%	4%	
	25-39	58%	64%	56%	
	40-49	22%	21%	27%	
	50-59	9%	3%	10%	
	60+	5%	5%	4%	
	Total	122	76	81	
SD	Mean	37.18	35.47	38.59	.
	Median	36	33	37	.

Prepared by Anthology Research

# Annual Household Income

EXCHANGE RATE HKD 7.81=\$1



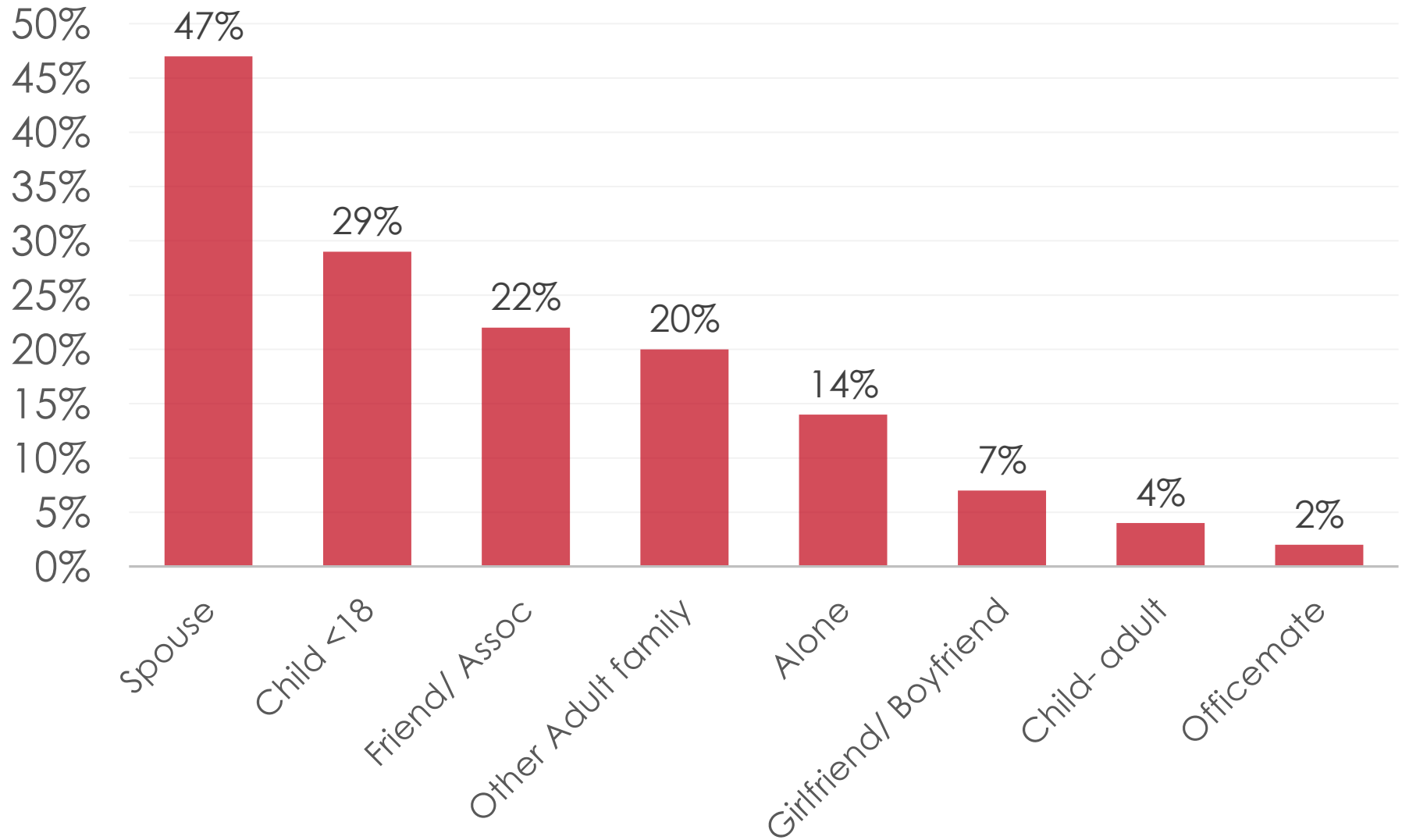
# Annual Household Income – Key Segments

**GVB EXIT SURVEY**  
**Q26 Household income:**

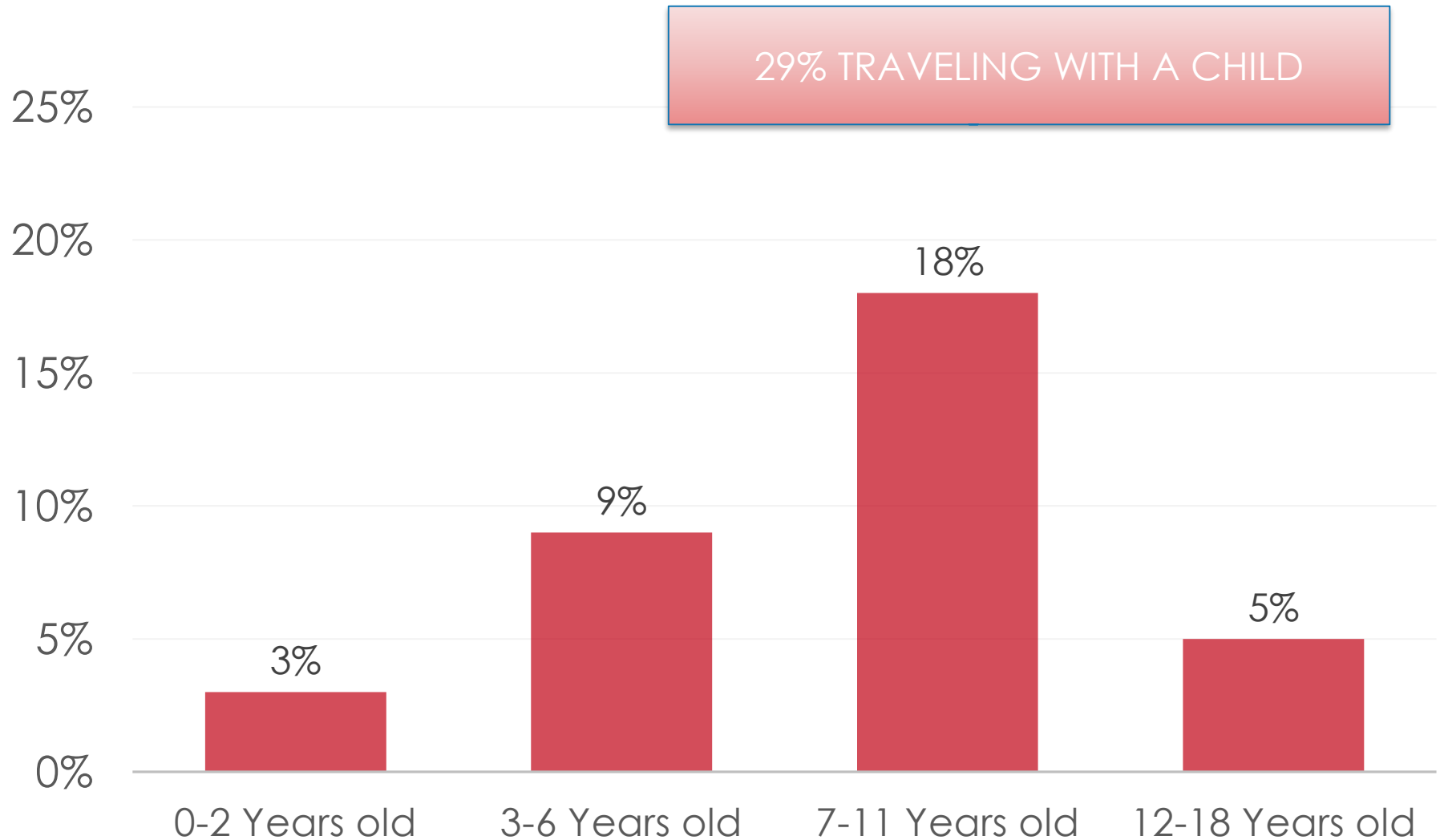
		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
Q26	<HKD120K	7%	4%	9%	
	HKD120K-HKD240K	16%	14%	11%	
	HKD240K-HKD500K	31%	33%	28%	
	HKD500K-HKD1.0M	19%	21%	22%	
	HKD1.0M-HKD2.0M	16%	14%	17%	
	HKD2.0M-HKD3.0M	8%	11%	11%	
	HKD3.0M+	1%	1%		
	No Income	2%	1%	1%	
	Total	122	76	81	

Prepared by Anthology Research

# Travel Party

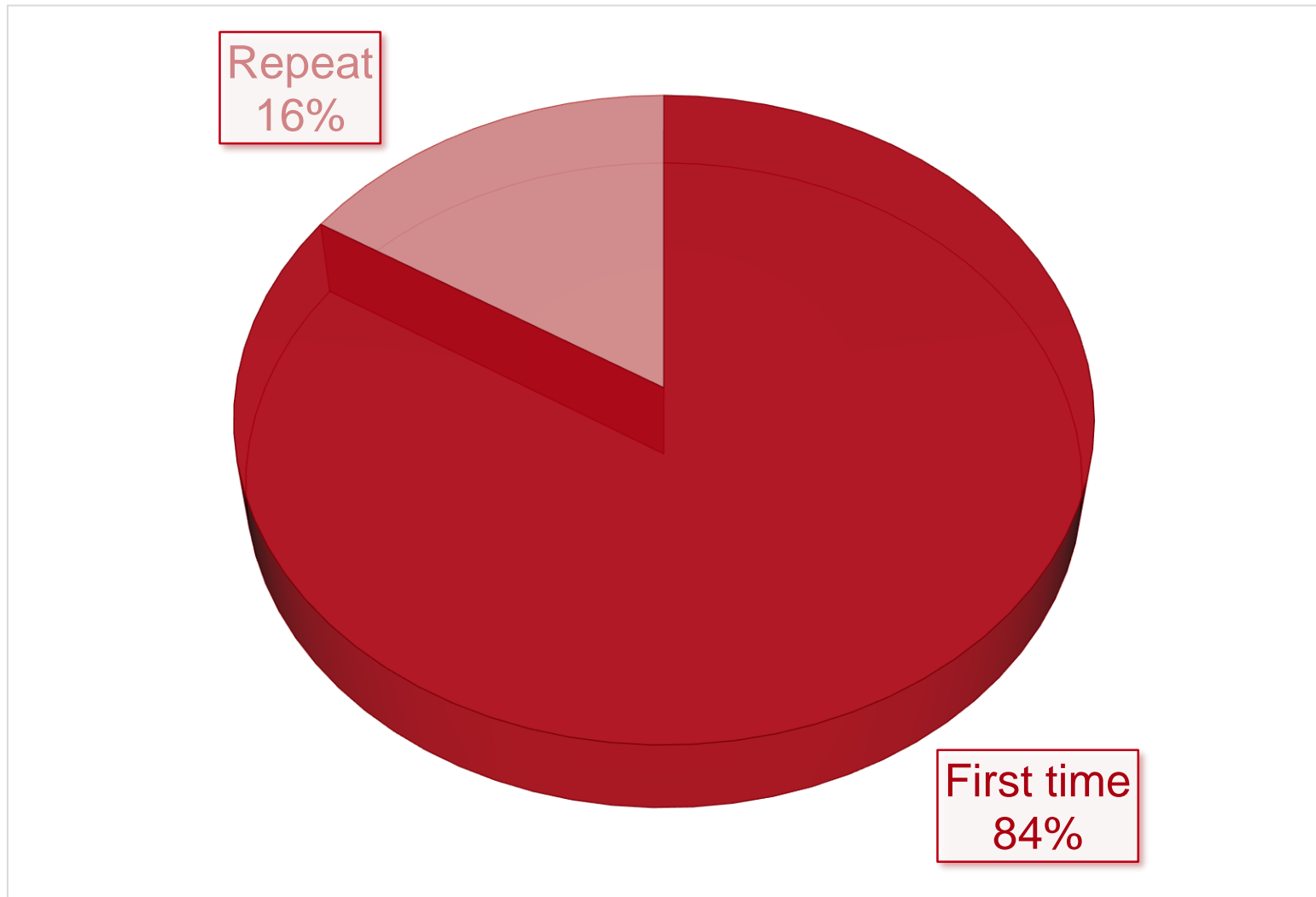


# Travel Party - Children

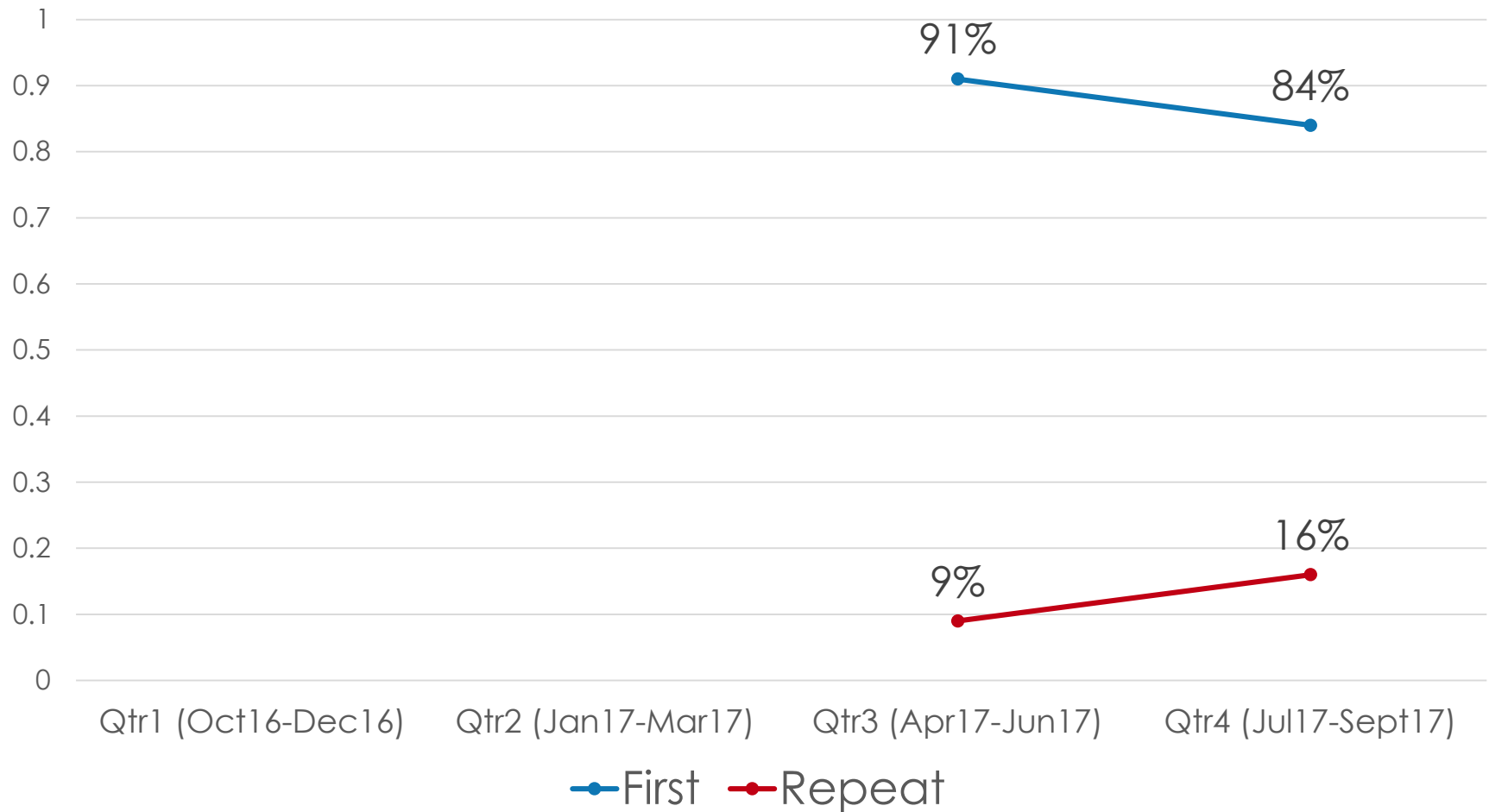




# Trips to Guam



# Trips to Guam – FY2017 Tracking



# Trips to Guam – Key Segments

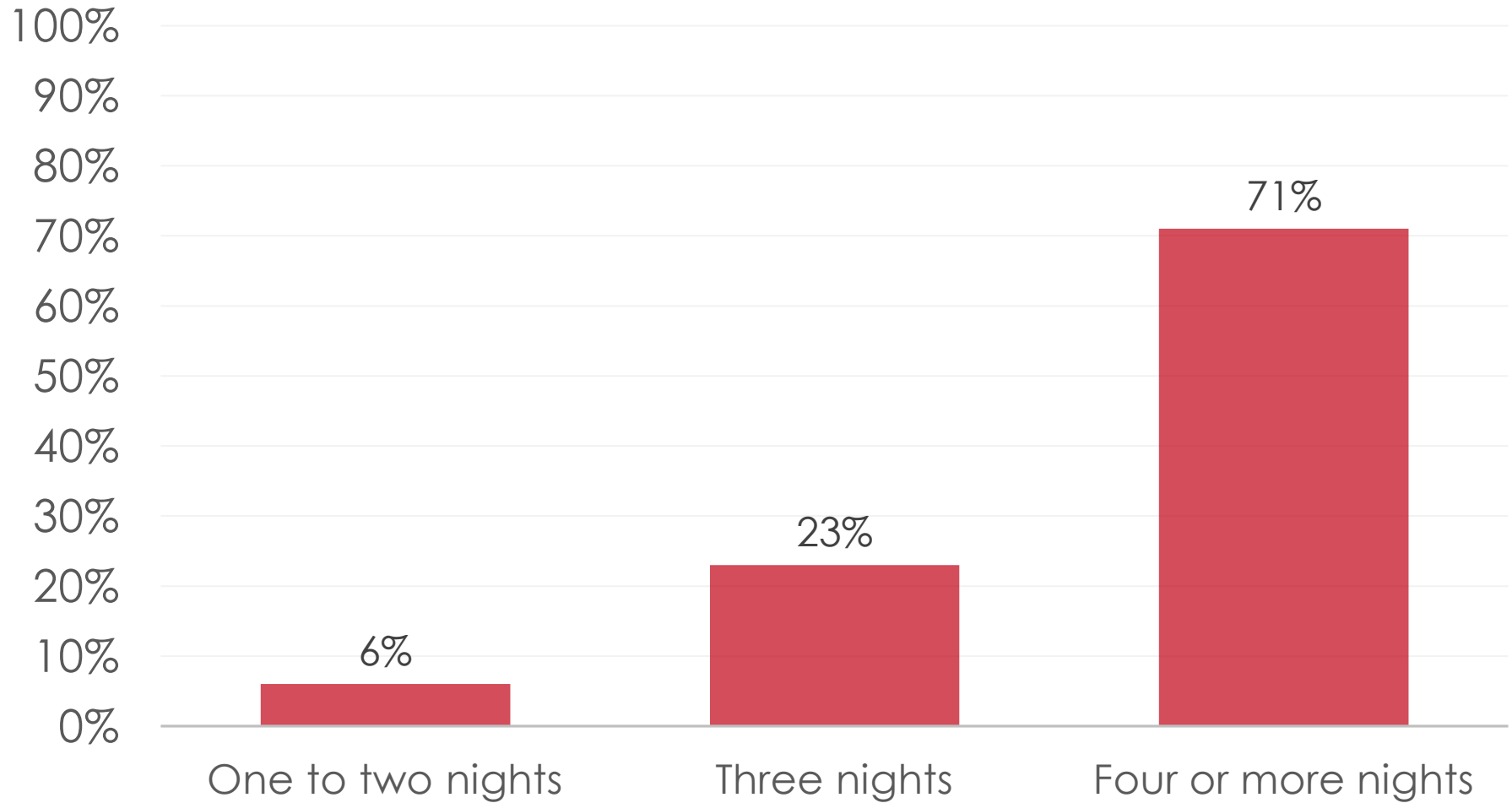
**GVB EXIT SURVEY**  
**Q3 Including this trip, how many times have you visited Guam?**

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
Q3	1st Time	84%	82%	86%	
	Repeat	16%	18%	14%	
	Total	122	76	81	
Q3A	Mean	1.43	1.49	1.37	.
	Median	1	1	1	.

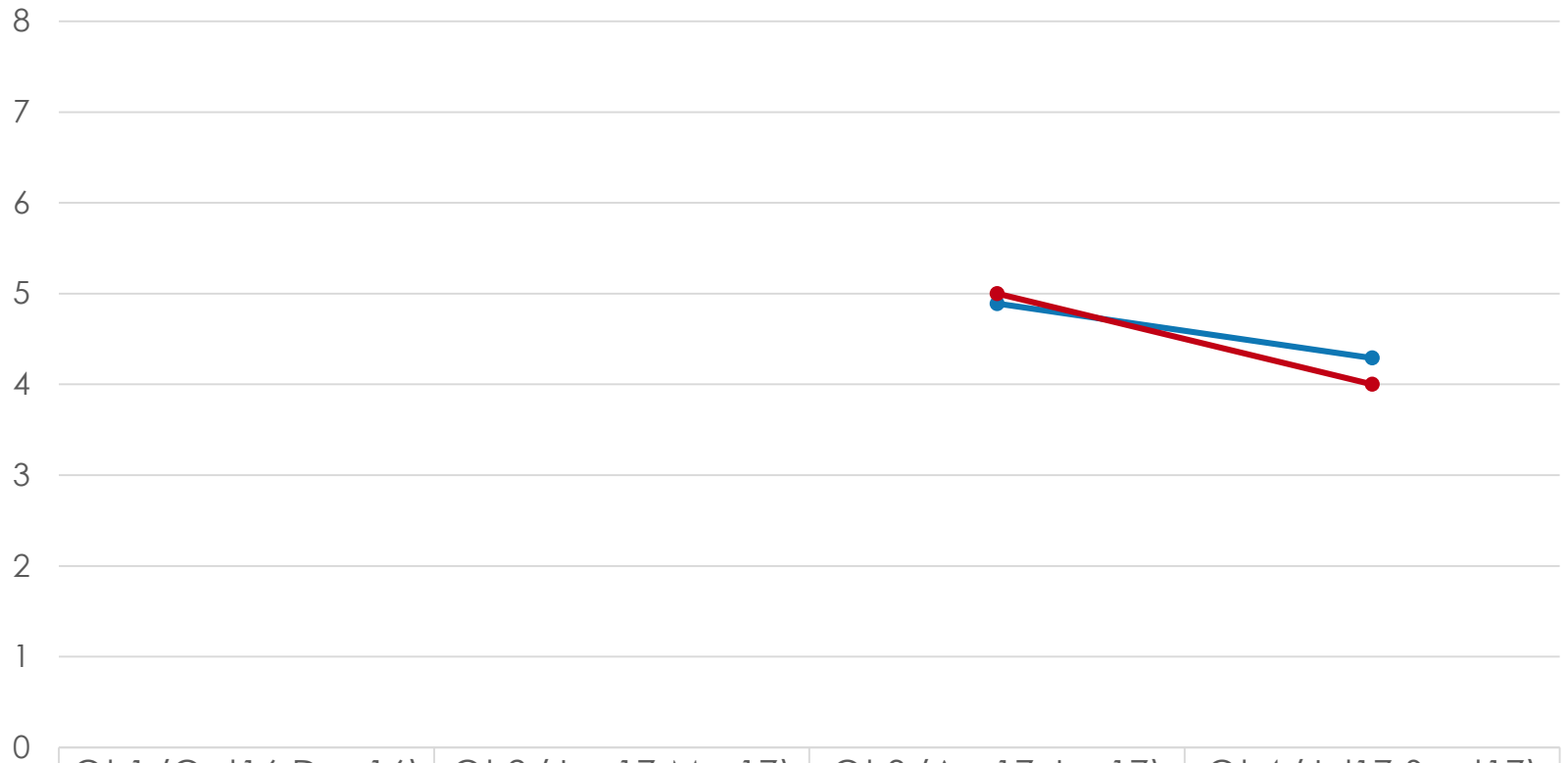
Prepared by Anthology Research

# Length of Stay

MEAN NUMBER OF NIGHTS = 4.29  
MEDIAN NUMBER OF NIGHTS = 4



# Length of Stay – FY2017 Tracking



MEAN			4.89	4.29
MEDIAN			5	4

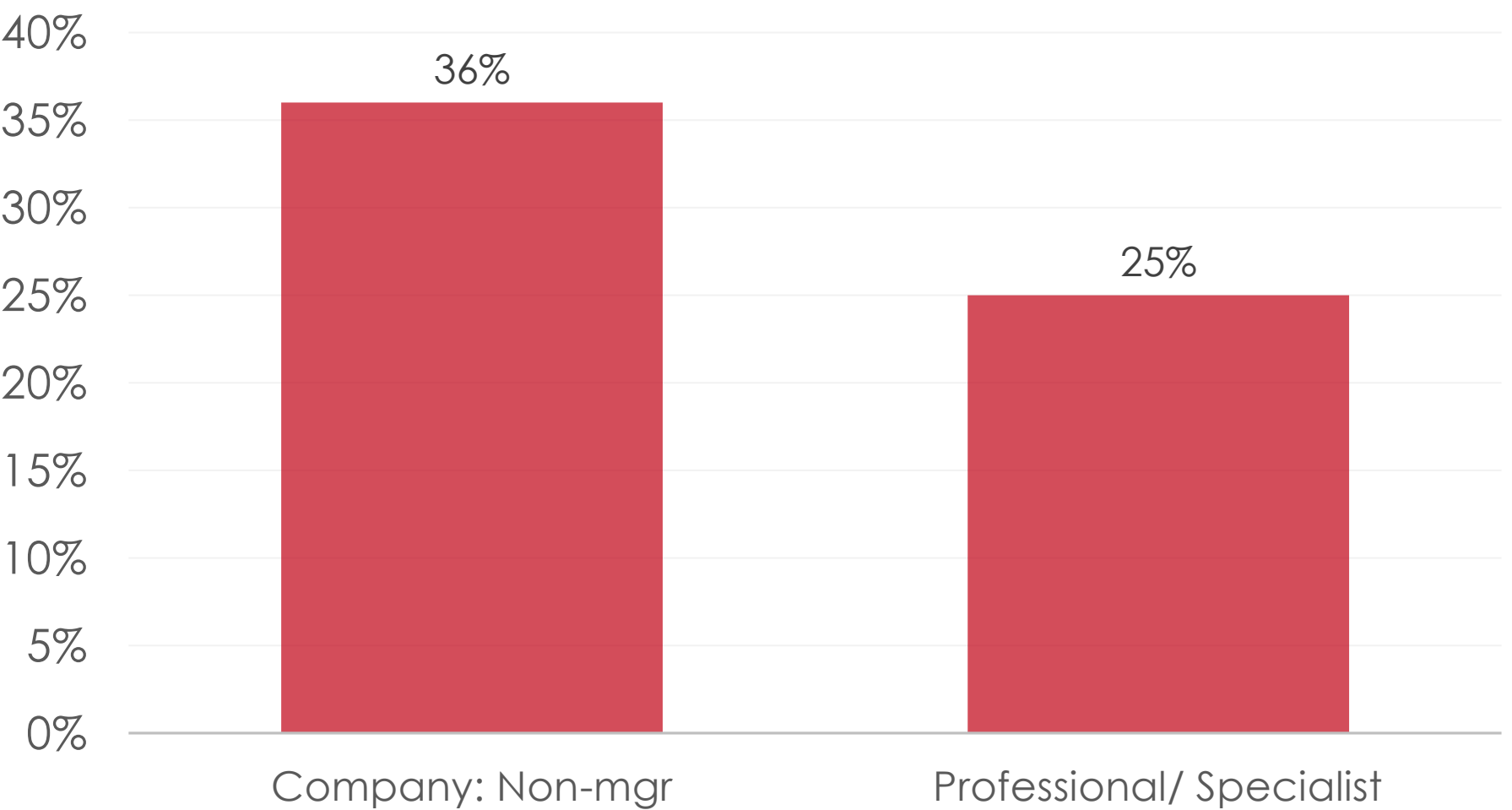
# Length of Stay – Key Segments

**GVB EXIT SURVEY**  
**SA How many nights did you stay on Guam?**

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
SA	1-2	6%	8%	2%	
	3	23%	16%	17%	
	4+	71%	76%	80%	
	Total	122	76	81	
SA	Mean	4.29	4.53	4.48	.
	Median	4	4	4	.

Prepared by Anthology Research

# Occupation – Top Responses (10%+)

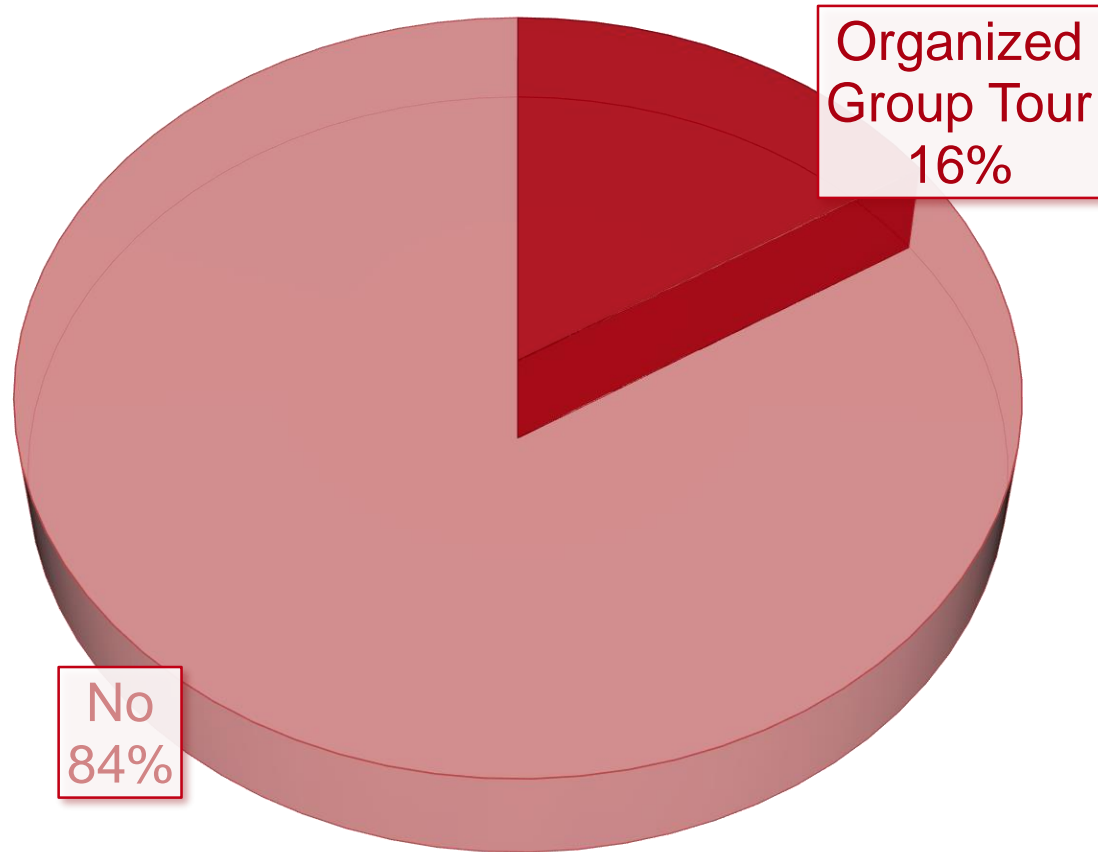


# SECTION 2

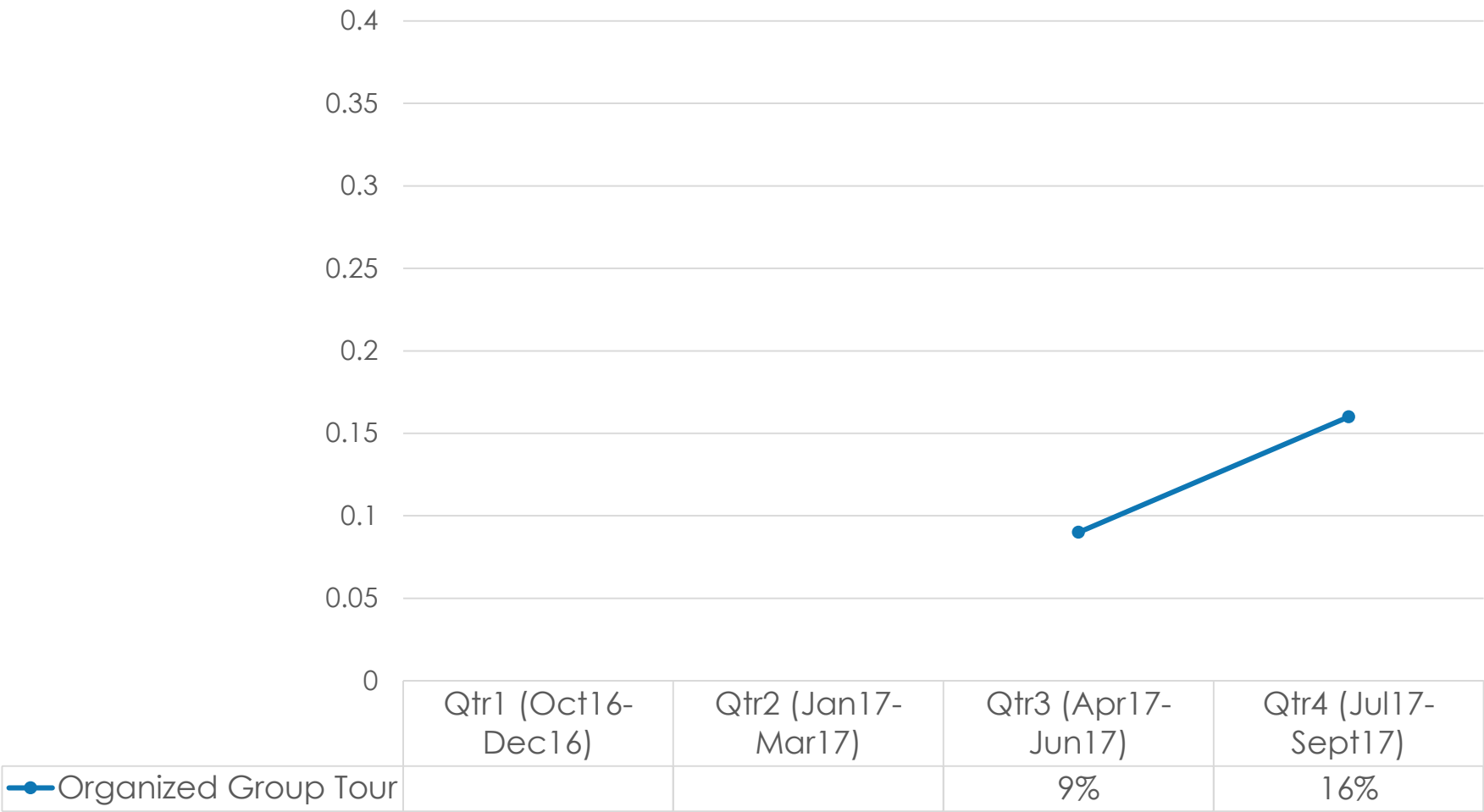
# TRAVEL PLANNING



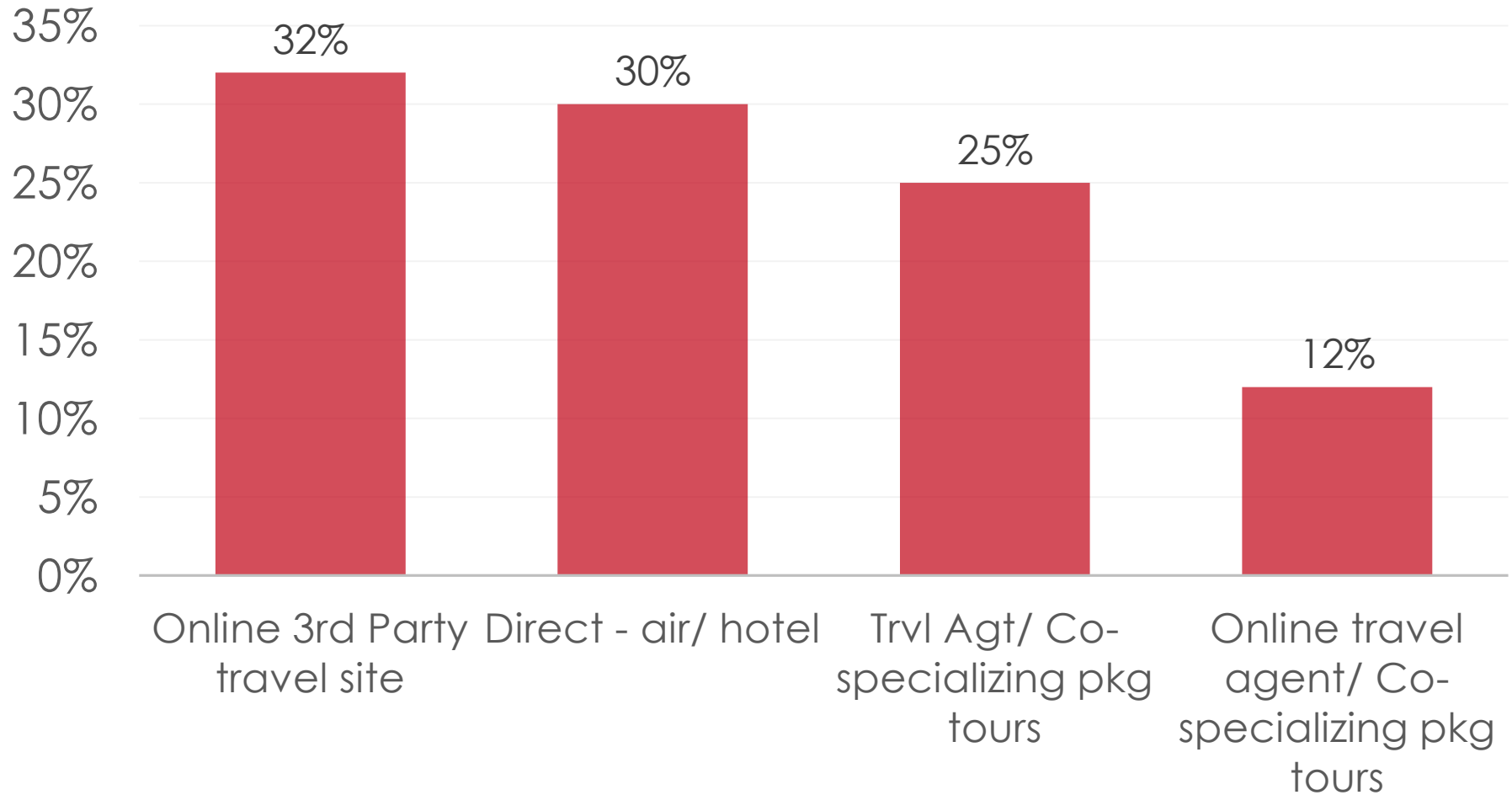
# Organized Group Tour



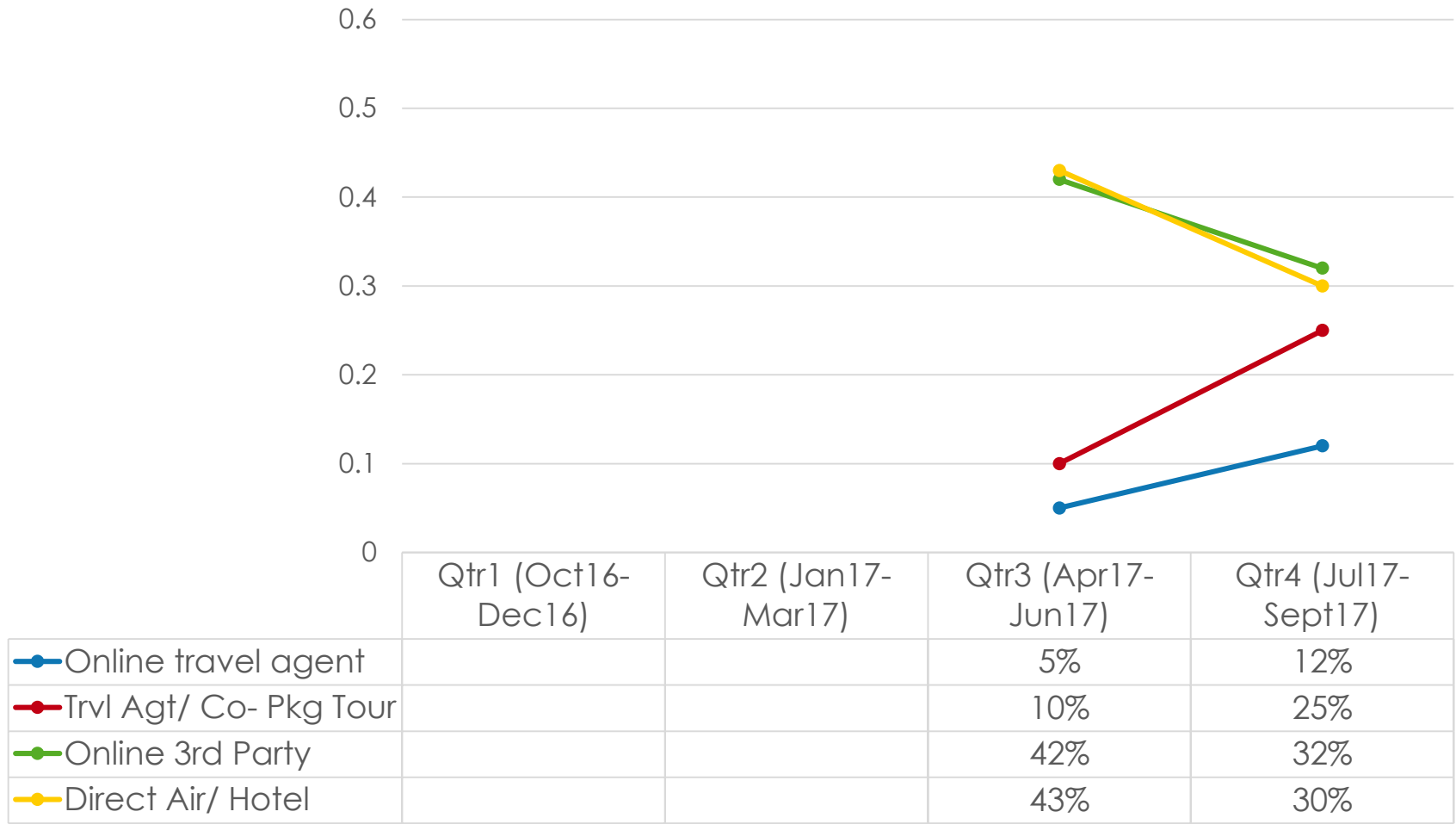
# Organized Group Tour– Tracking



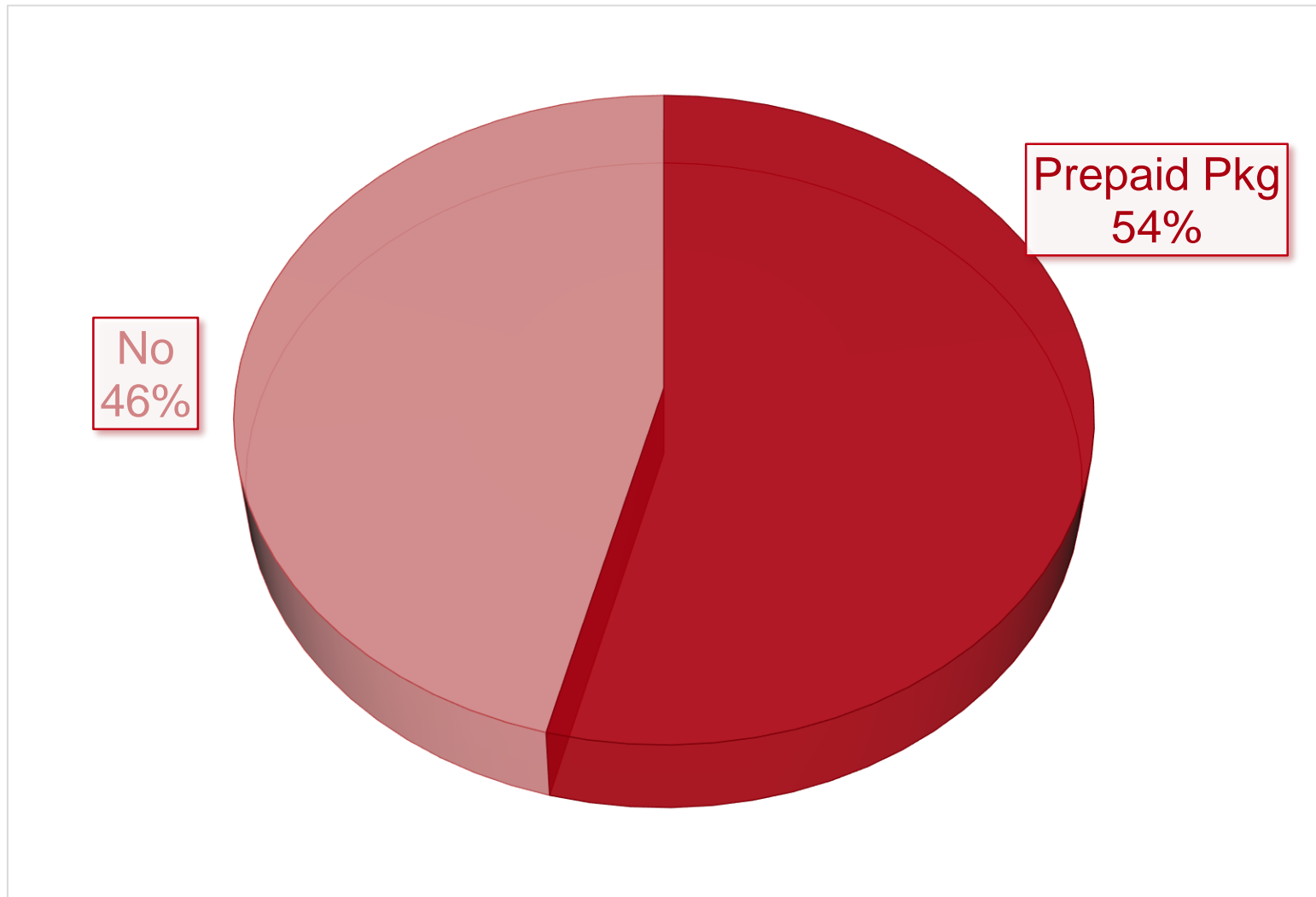
# Travel Arrangements- Sources



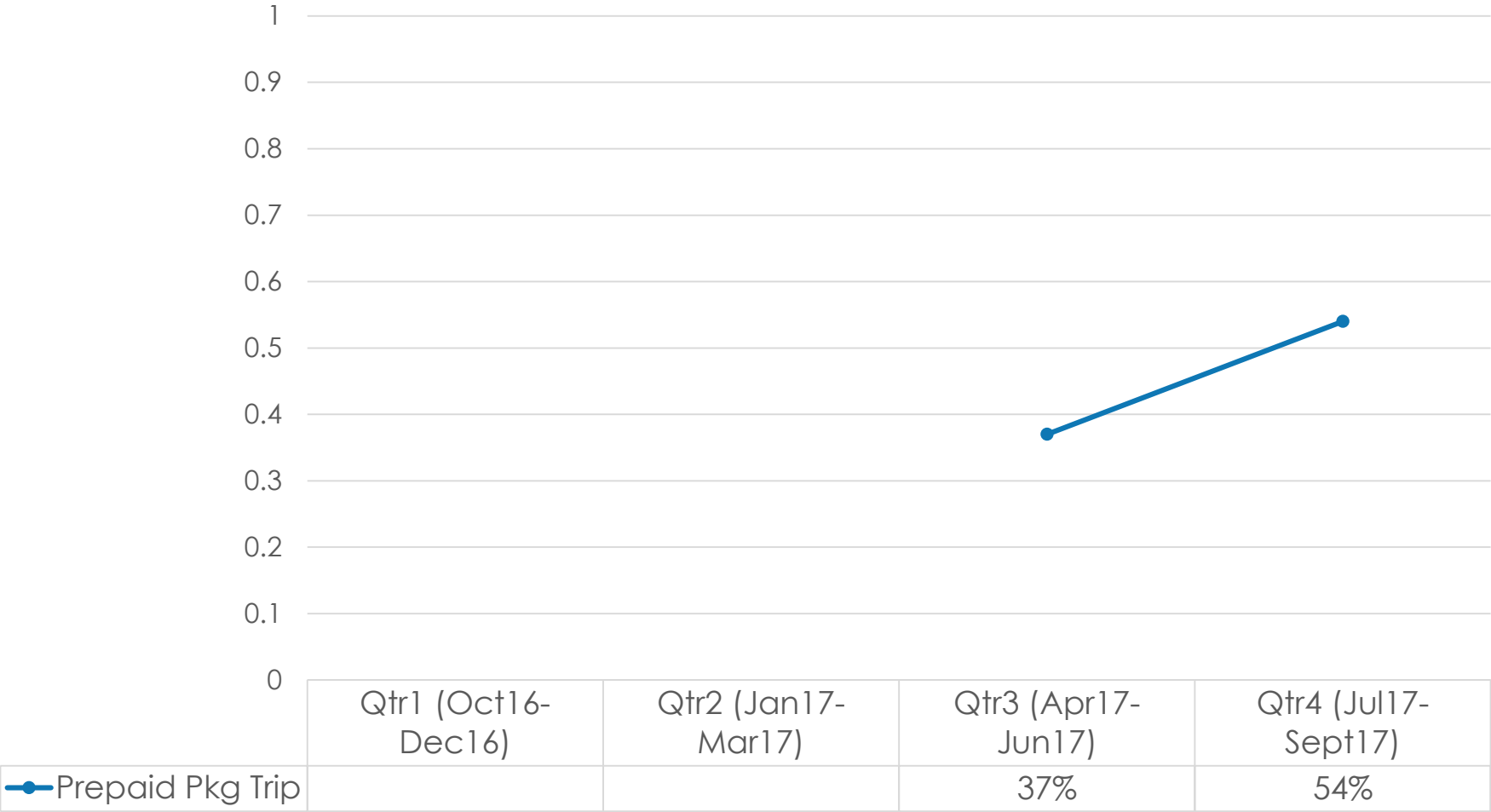
# Travel Arrangements- Sources



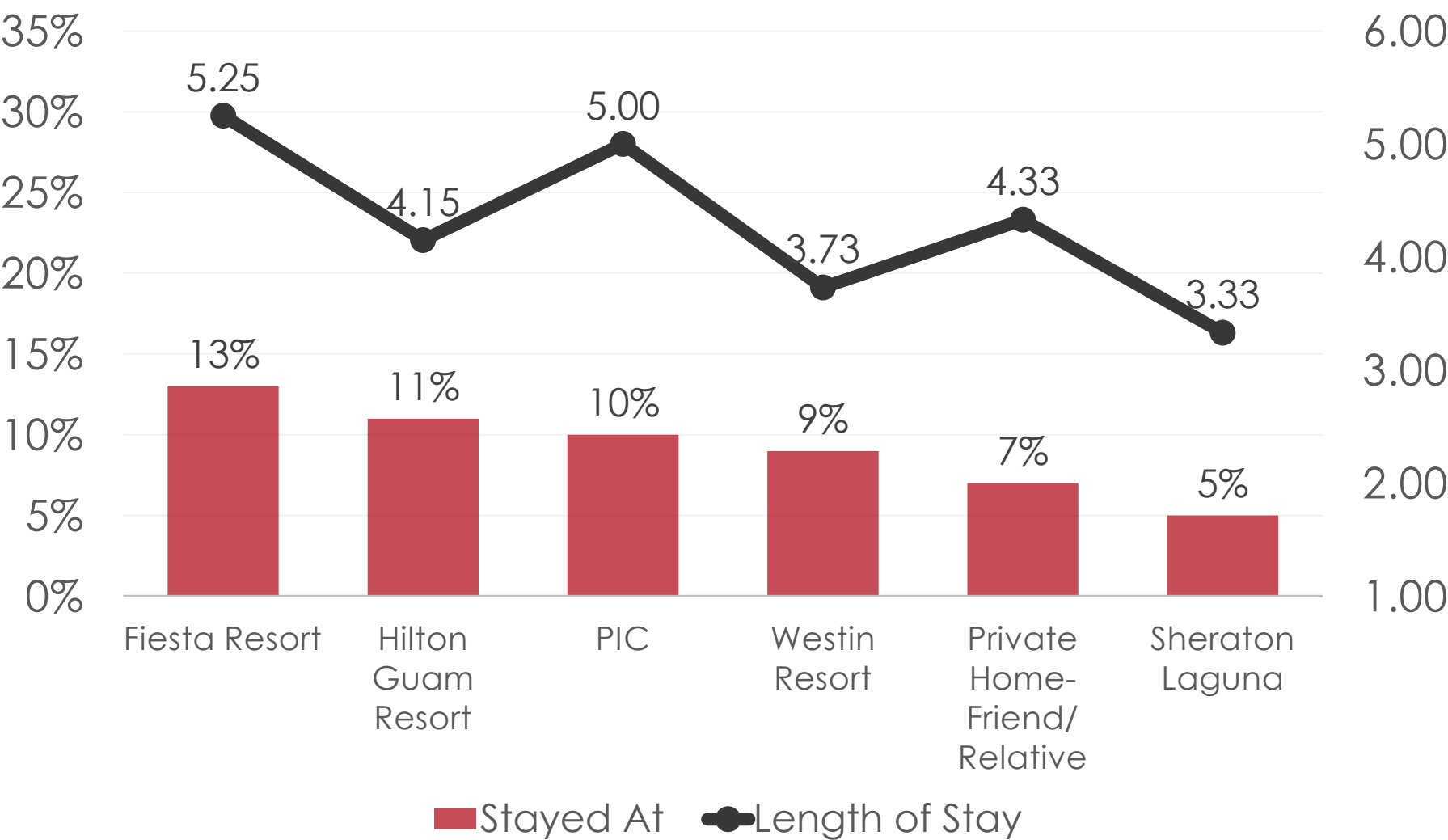
# Prepaid Pkg Trip



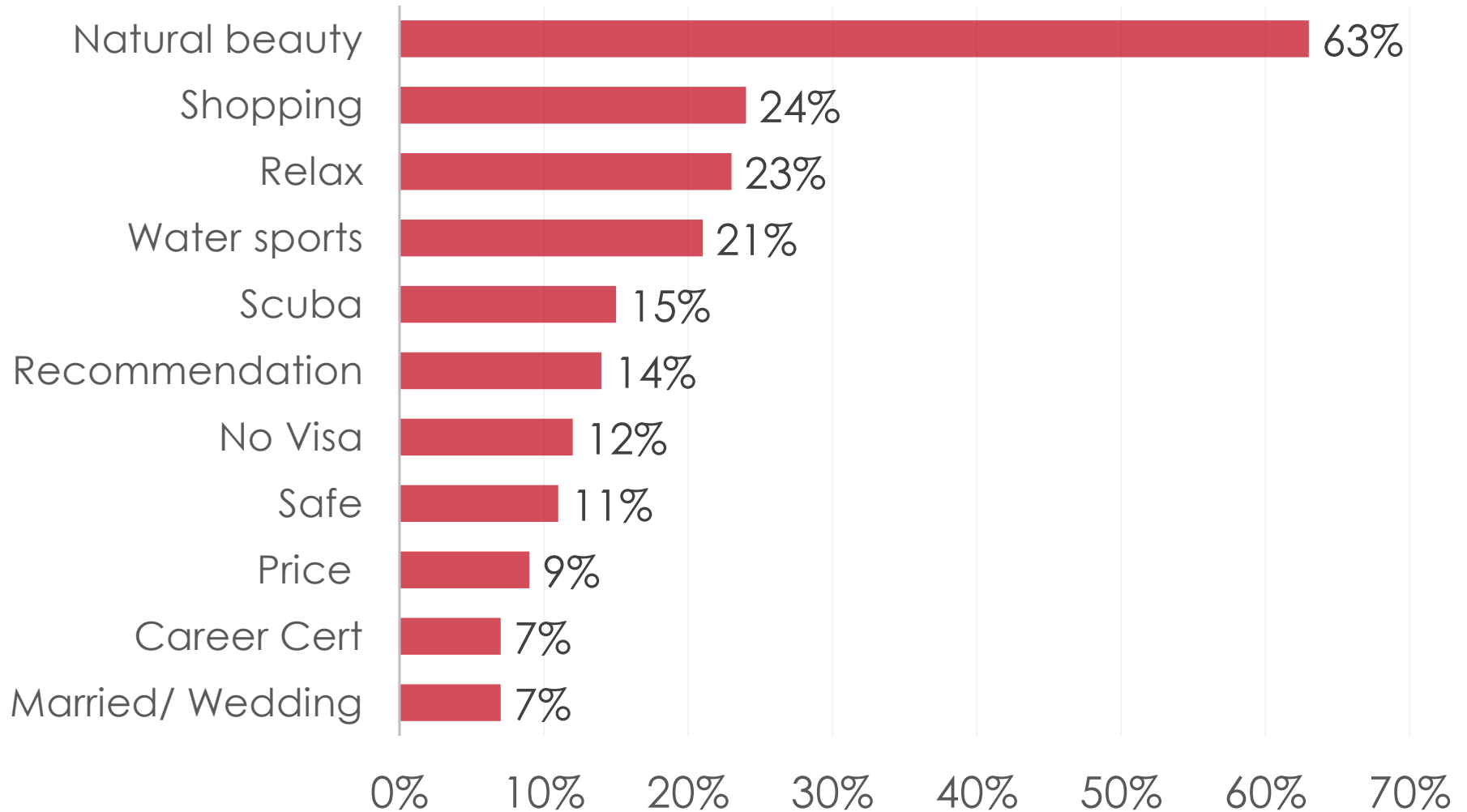
# Prepaid Pkg Trip



# Accommodations (Top Responses)



# Travel Motivation (Top Responses)





# Travel Motivation – Key Segments

**GVB EXIT SURVEY**  
**Q5A Please select the top three reasons that motivated you to travel to Guam?**

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
Q5A	Beautiful seas, beaches, tropical climate	63%	60%	69%	
	Shopping	24%	28%	28%	
	Just to relax	23%	25%	23%	
	Water sports (snorkeling, windsurfing, parasailing)	21%	24%	22%	
	Scuba diving	15%	16%	14%	
	Recommendation of friend/ relative/ travel agency	14%	15%	14%	
	No Visa	12%	12%	12%	
	It is a safe place to spend a vacation	11%	7%	14%	
	Price of the tour package	9%	8%	11%	
	Career certification/ testing	7%	11%	1%	
	To Get Married/ attend Wedding	7%	8%	6%	
	A previous visit	6%	5%	7%	
	Pleasure/ vacation	3%	3%	2%	
	Short travel time (not too far from home)	2%	3%	2%	
	Adventure	2%	3%	1%	
	To visit friends or relatives	2%	3%	2%	
	Company/ business trip	2%	3%		
	Incentive trip	2%		1%	
	Total	121	75	81	

# SECTION 3

# EXPENDITURES

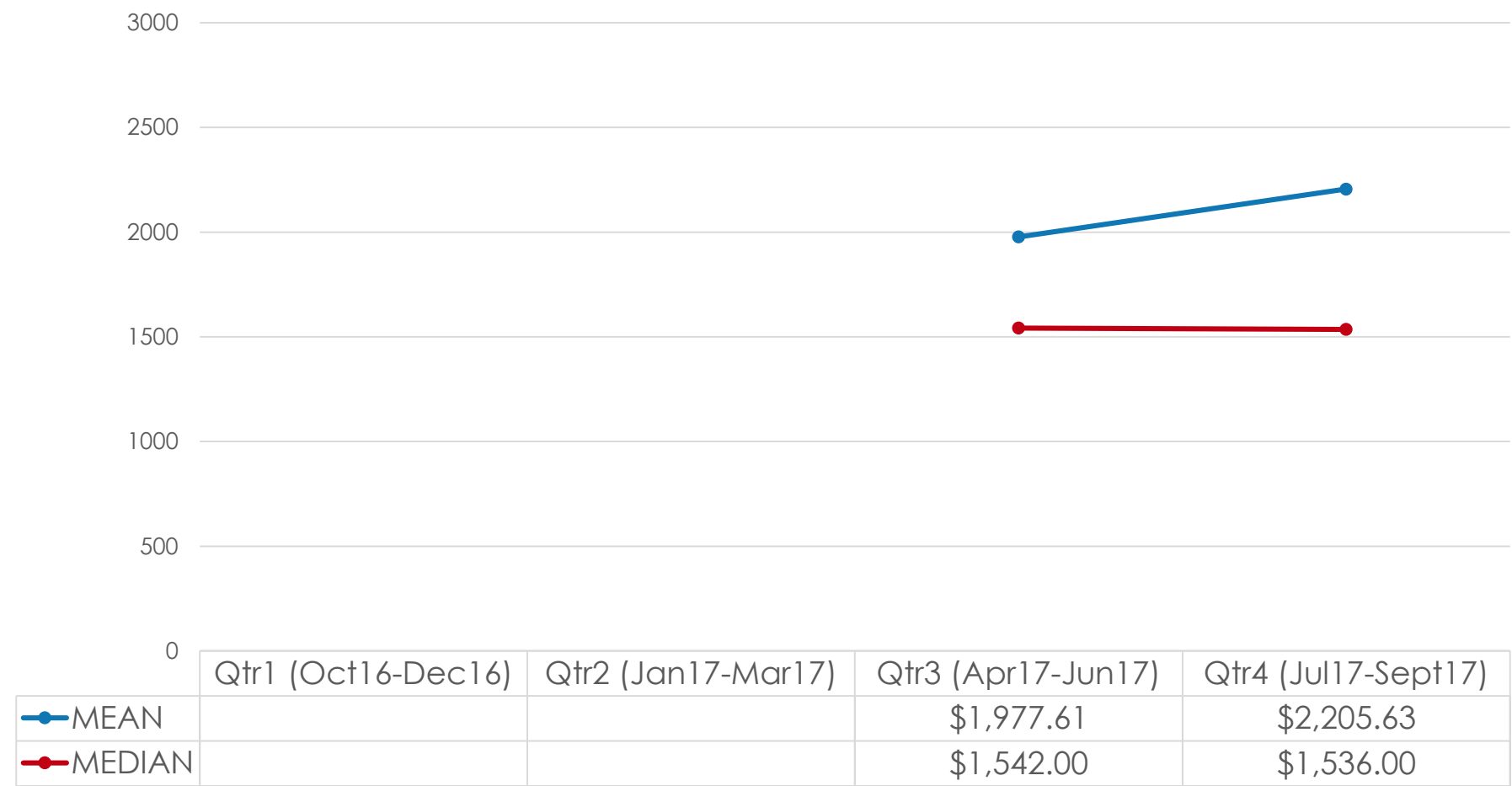
# Prepaid Expenditures

EXCHANGE RATE HKD 7.81=\$1

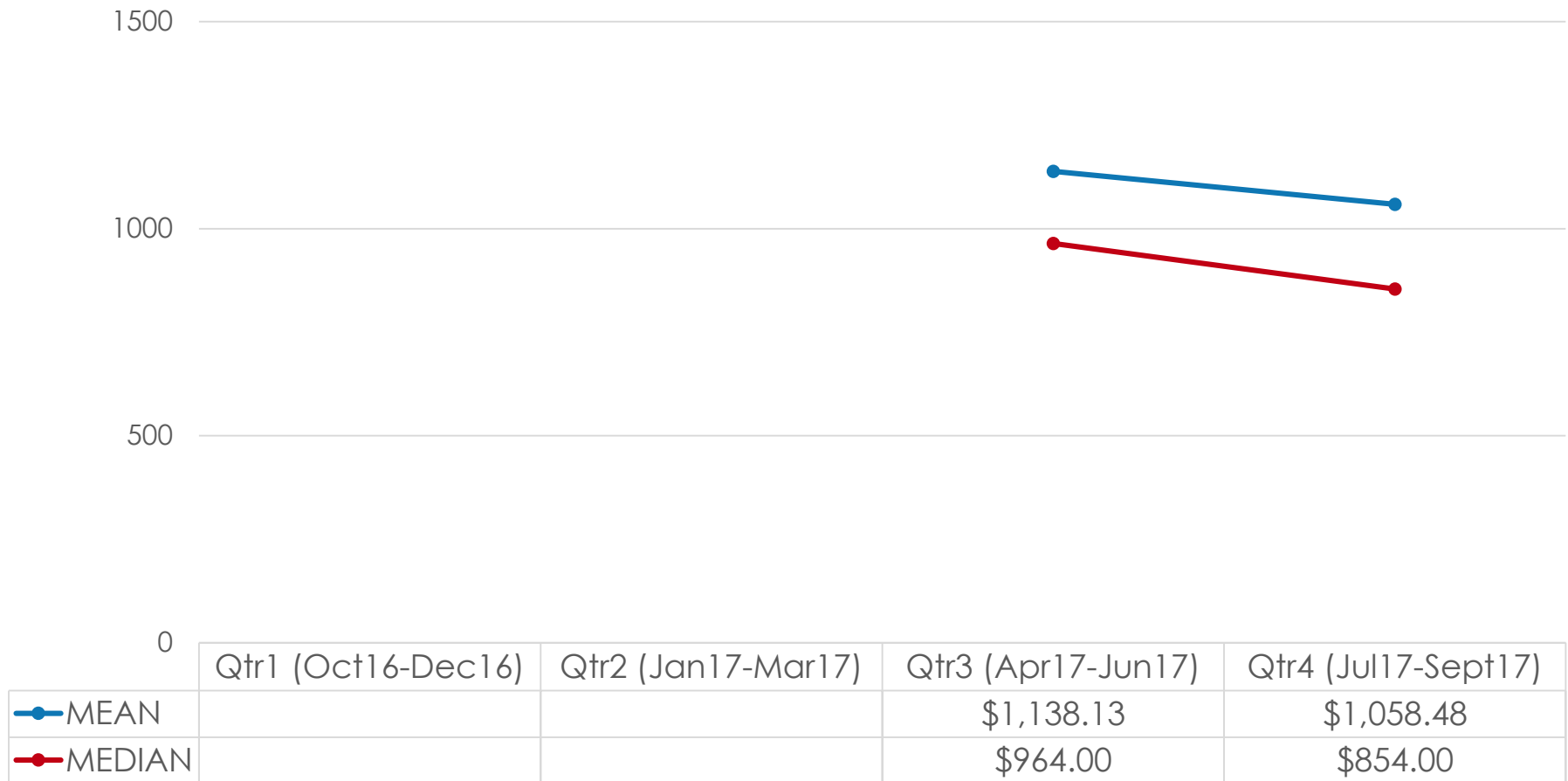
- \$2,205.63 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$1,058.48 = overall mean average per person prepaid expenditures

# Prepaid Entire Travel Party – FY2017

## Tracking



# Prepaid Per Person– FY2017 Tracking



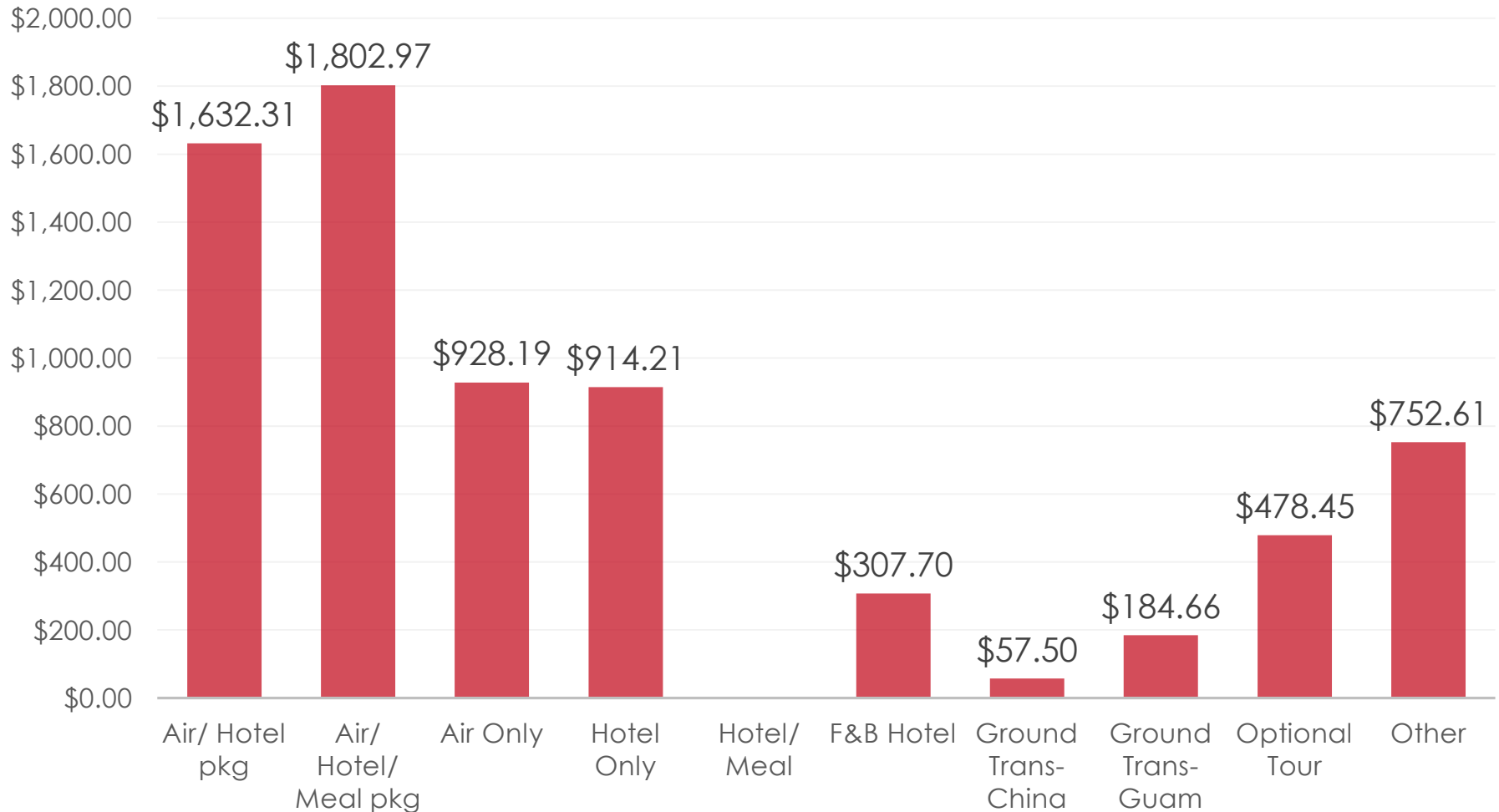
# Prepaid Per Person– Key Segments

**GVB EXIT SURVEY  
Q10A PREPAID - PER PERSON:**

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
PREPAID PP	Mean	\$1,058.48	\$1,043.27	\$1,027.15	.
	Median	\$854	\$768	\$854	.

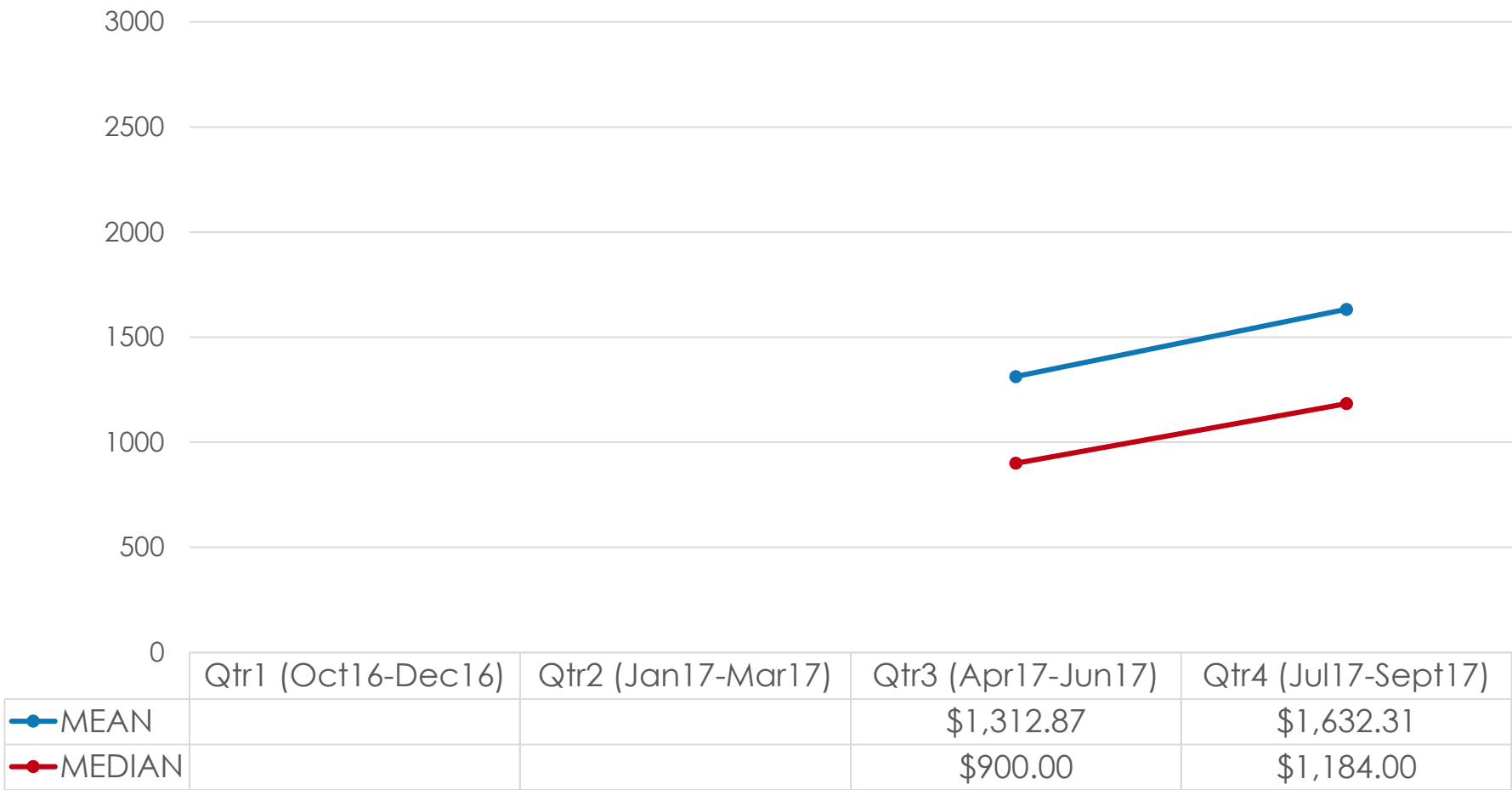
Prepared by Anthology Research

# Prepaid Expenses by Category – MEAN Entire Travel Party



# Prepaid– FY2017 Tracking

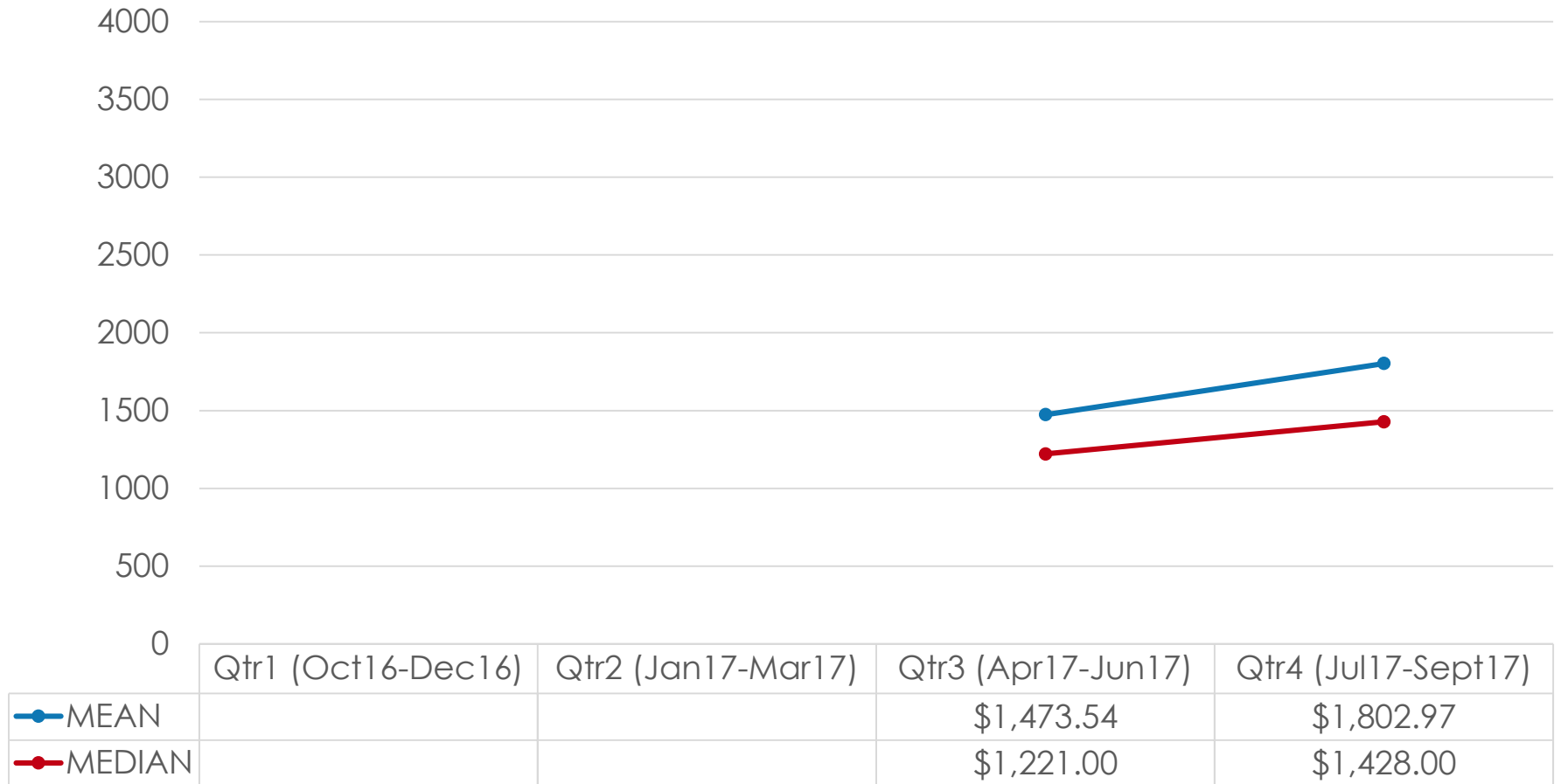
## Airfare & Accommodation Packages





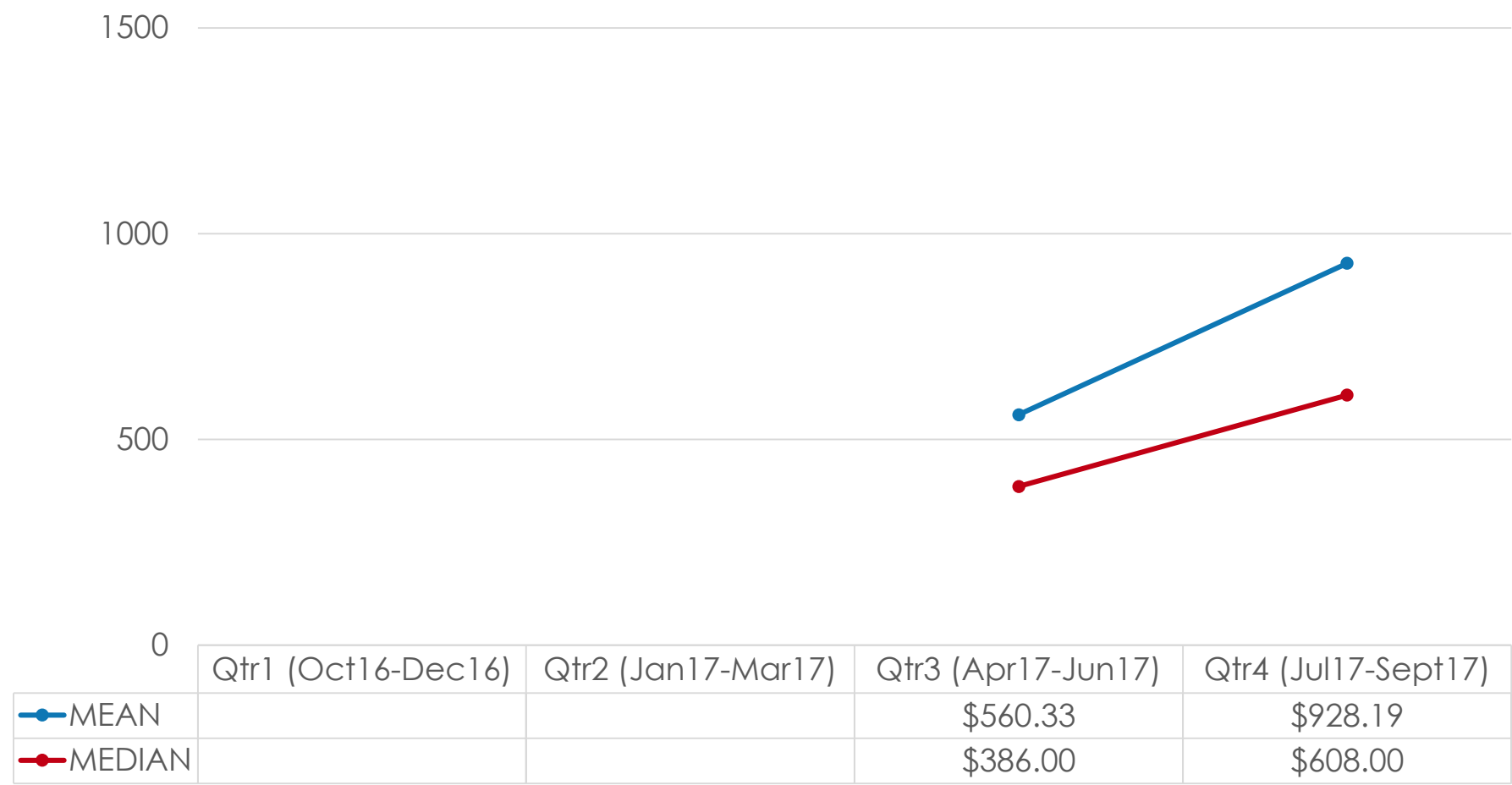
# Prepaid– FY2017 Tracking

## Airfare & Accommodation W/ Meal Packages

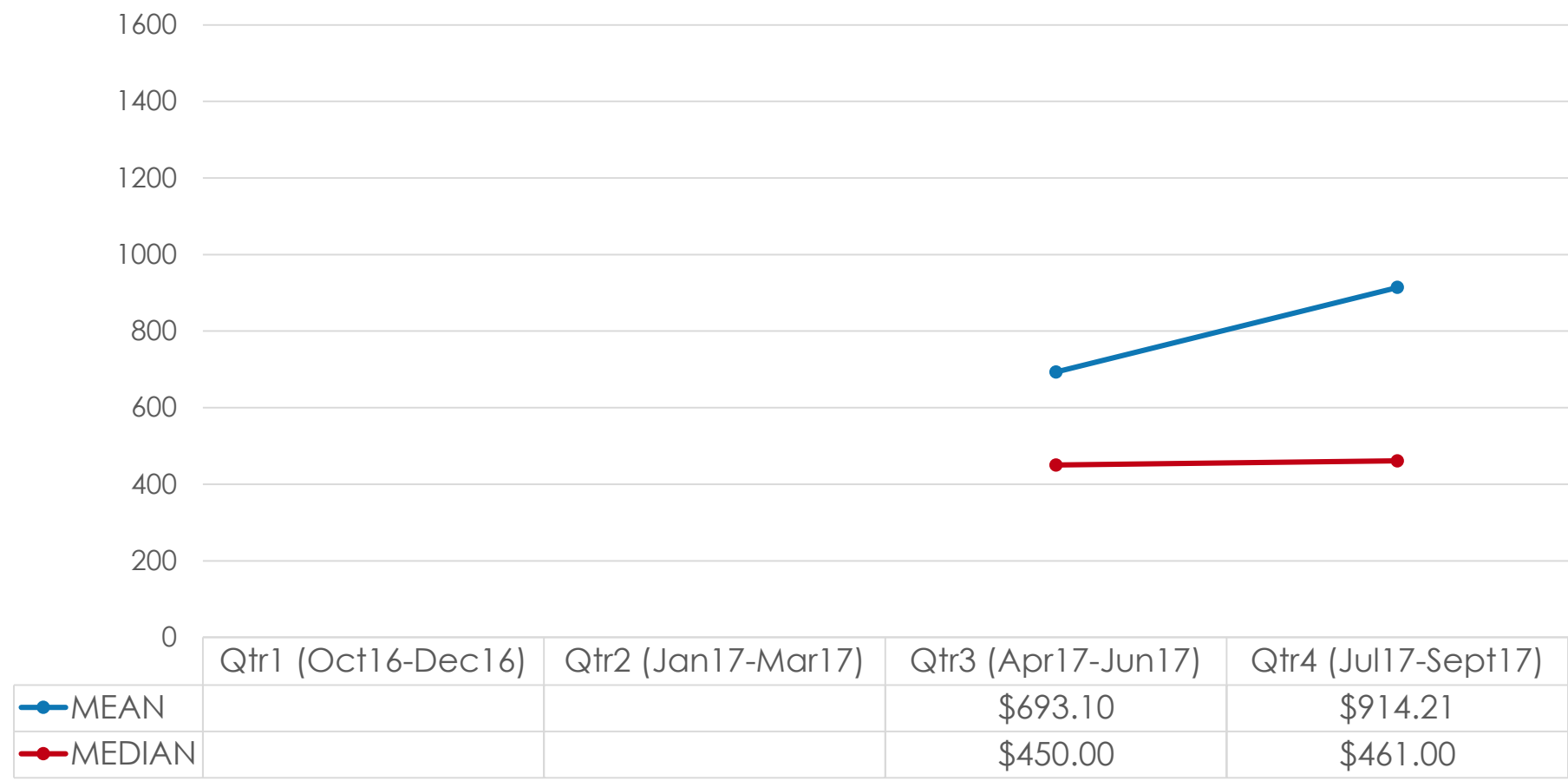


# Prepaid– FY2017 Tracking

## Airfare Only

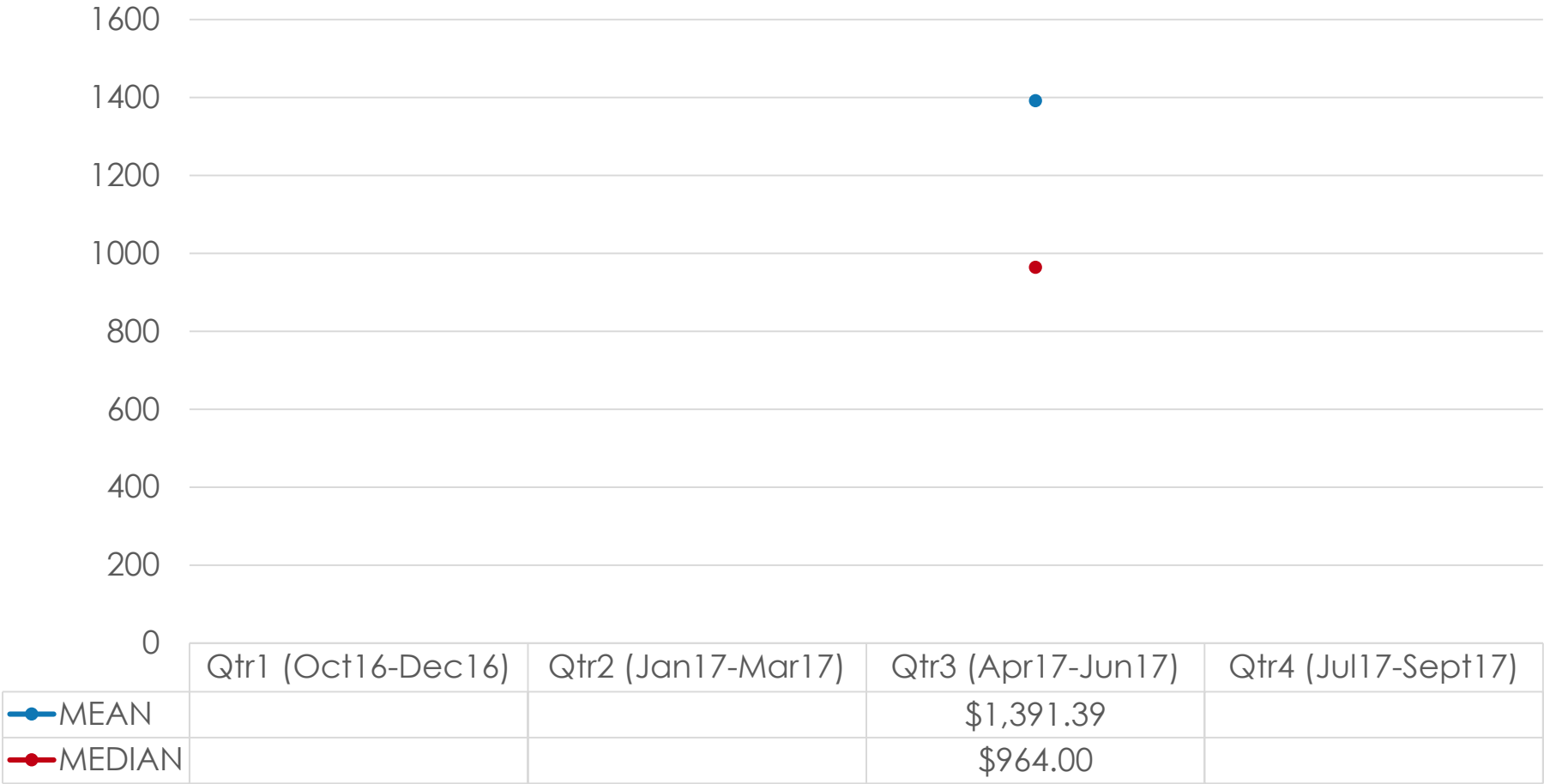


# Prepaid– FY2017 Tracking Accommodations Only



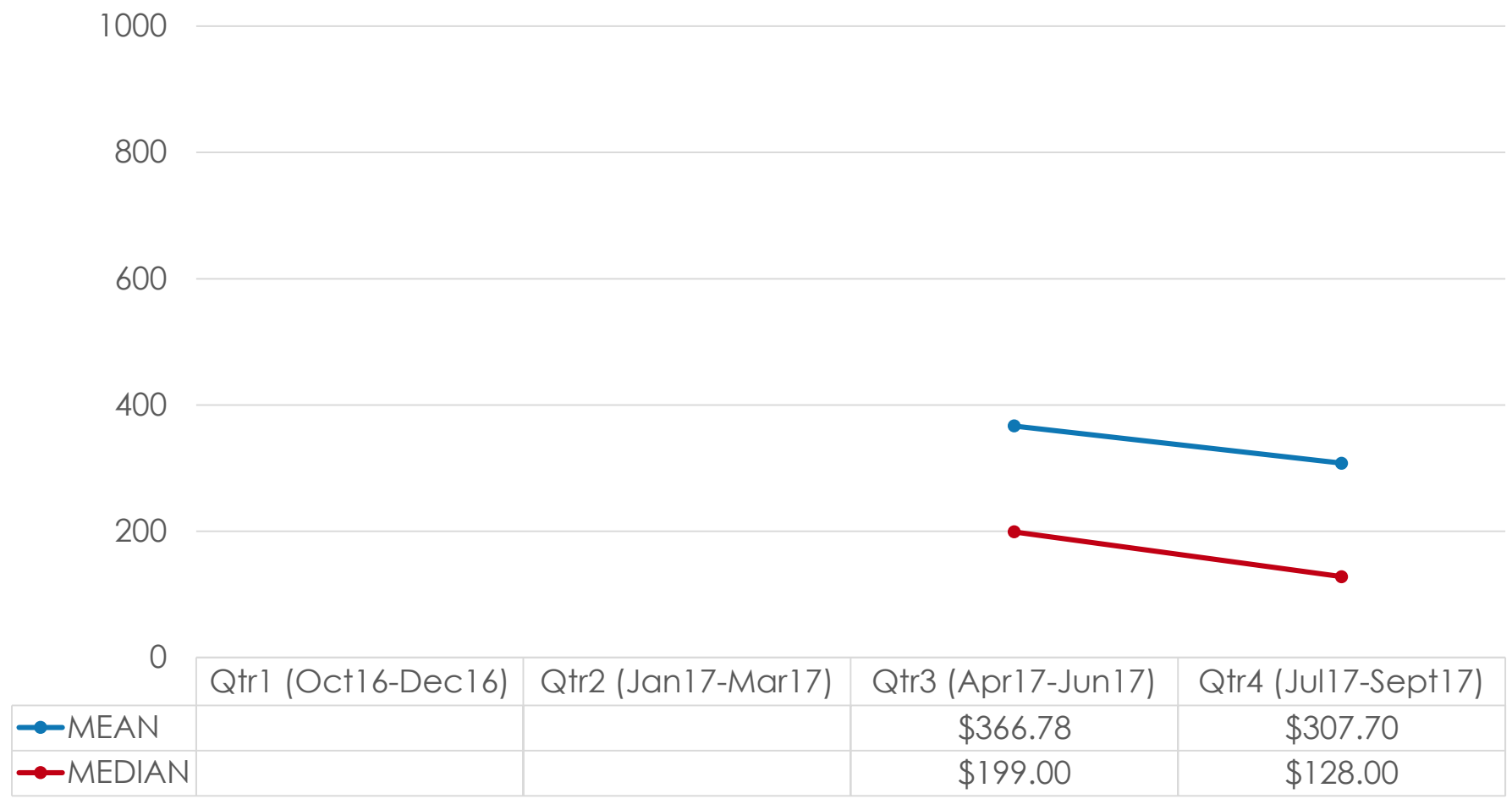
# Prepaid– FY2017 Tracking

## Accommodations w/ Meal Only



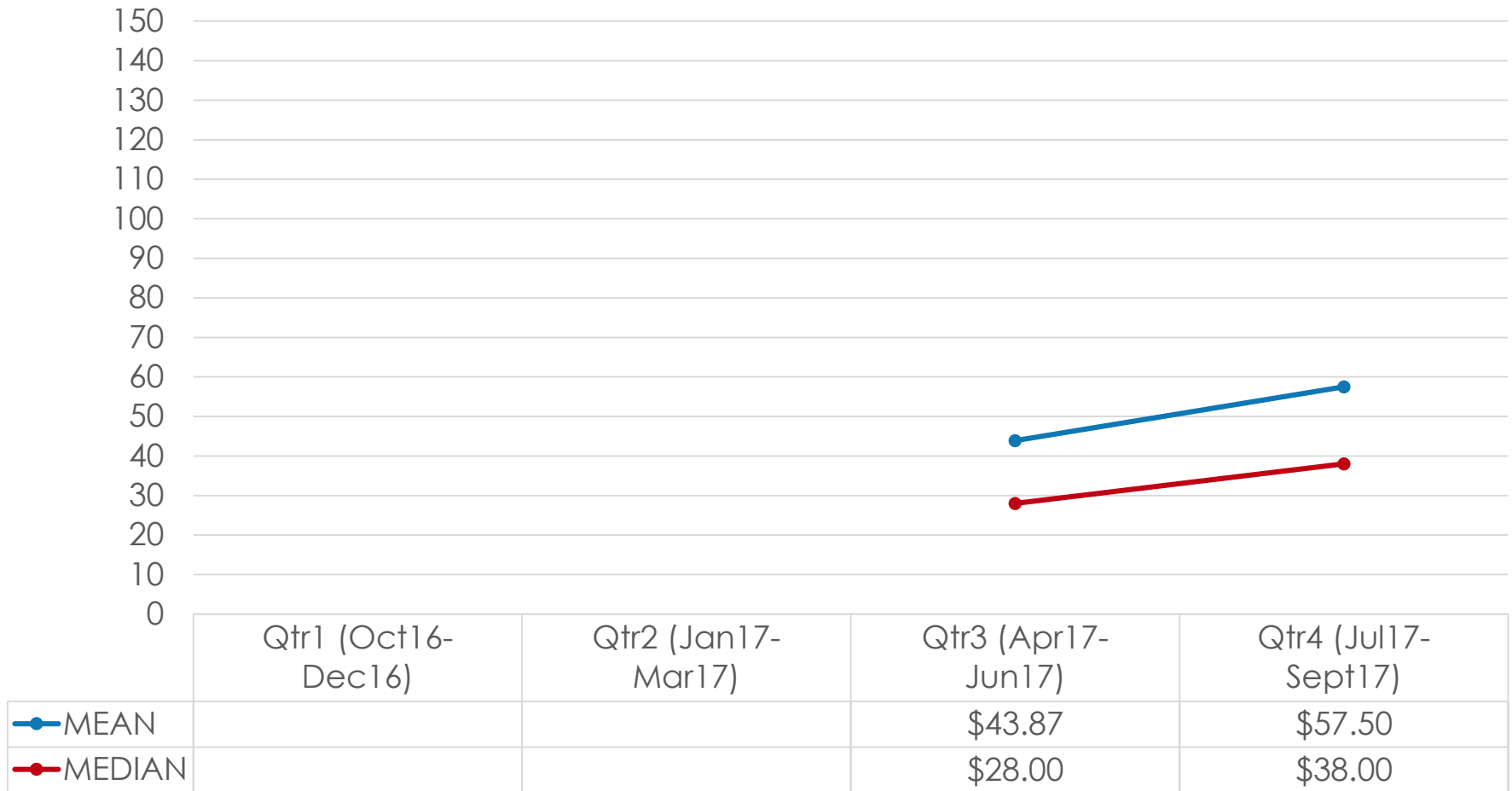
# Prepaid– FY2017 Tracking

## Food & Beverage in Hotel



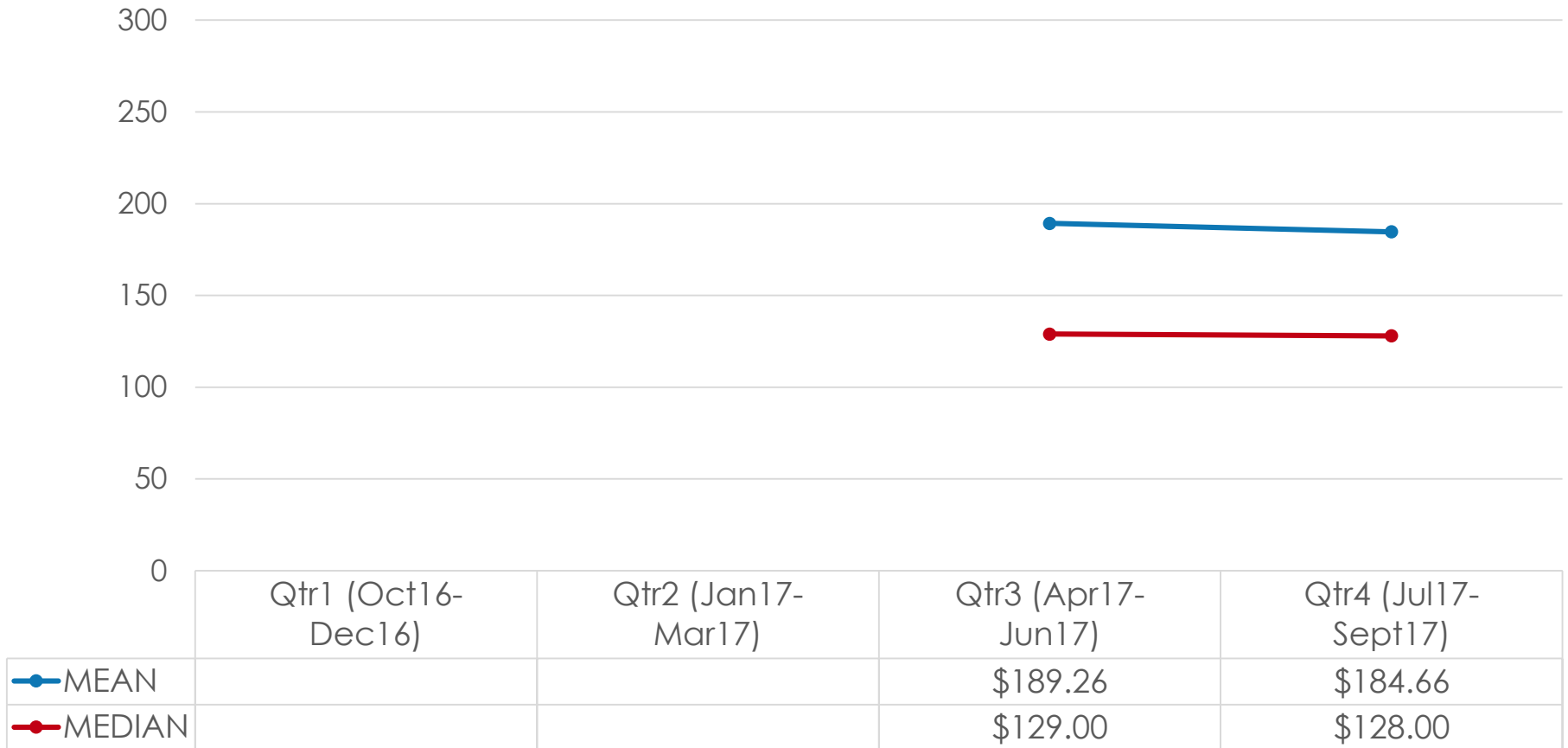
# Prepaid– FY2017 Tracking

## Ground Transportation – Hong Kong



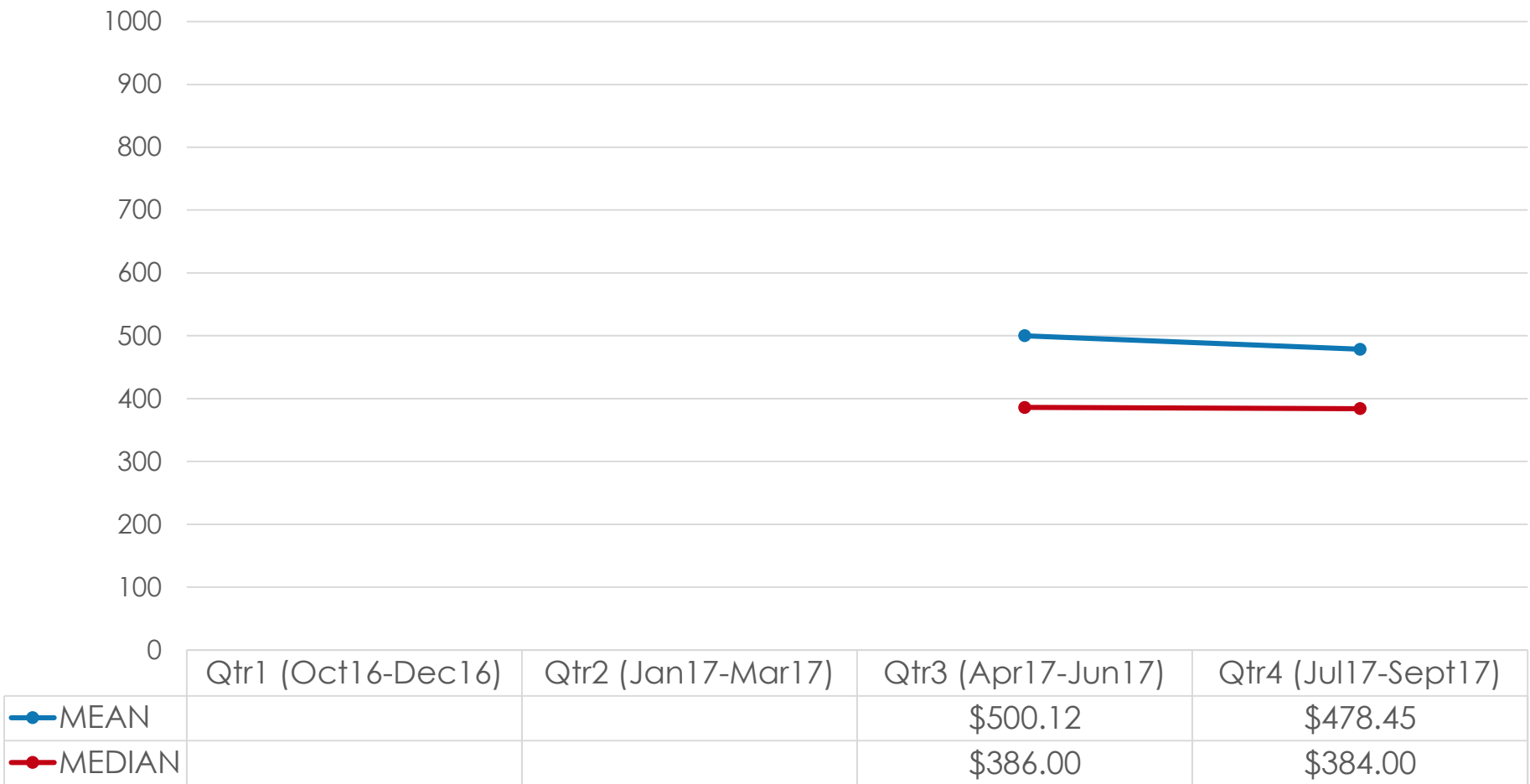
# Prepaid– FY2017 Tracking

## Ground Transportation - Guam



# Prepaid– FY2017 Tracking

## Optional tours/ Activities

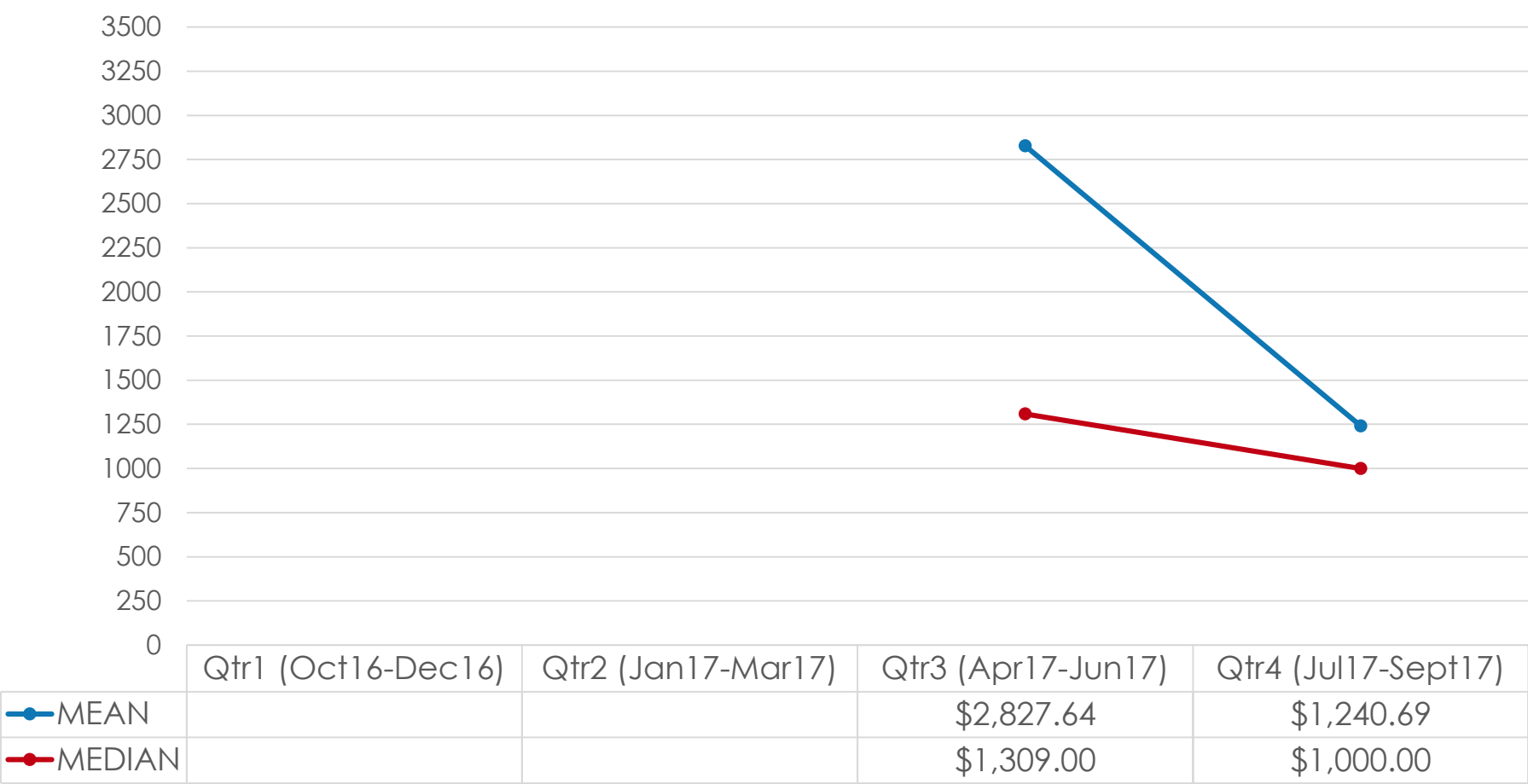




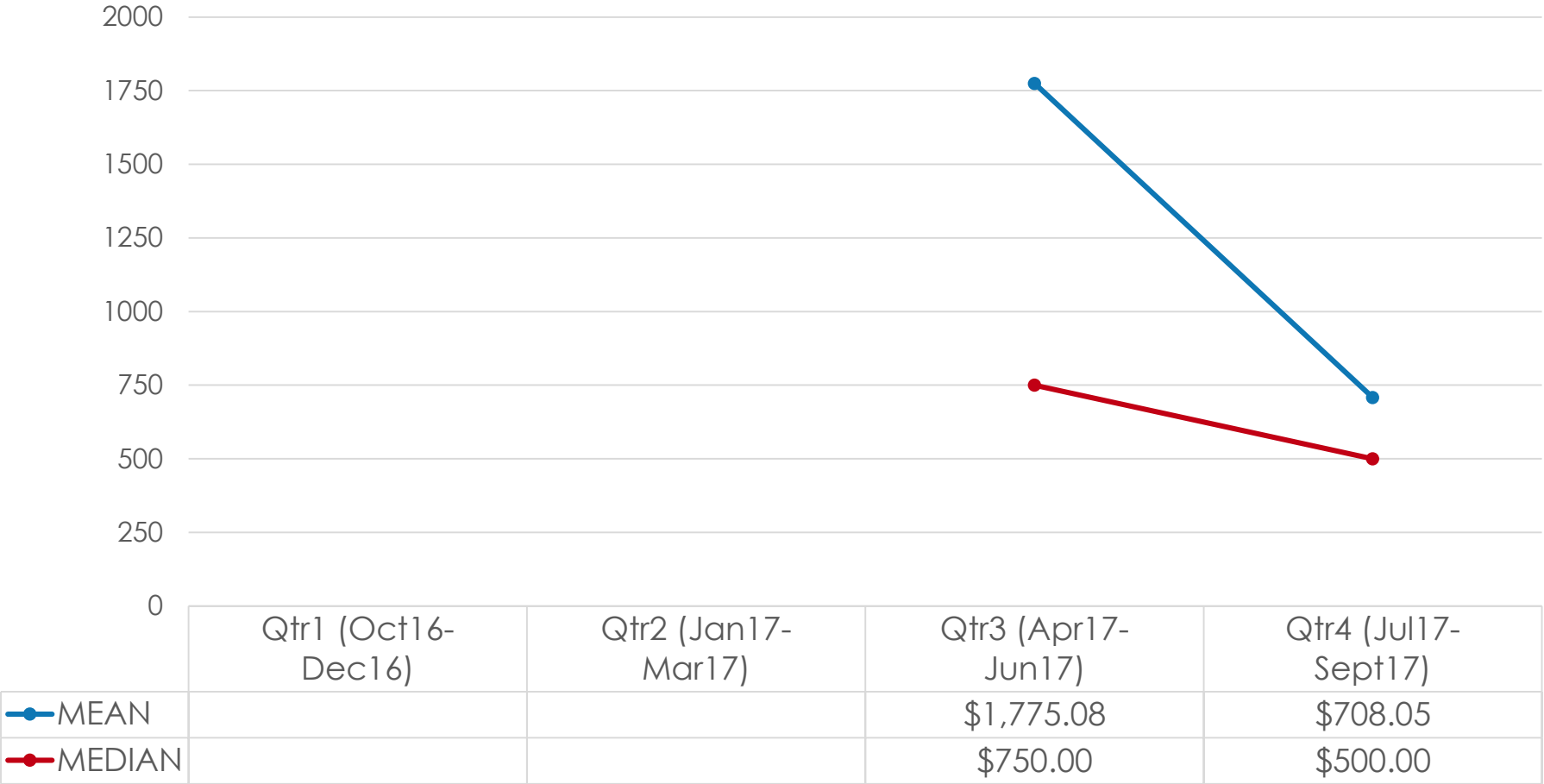
# On-Island Expenditures

- \$1,240.69 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$708.05 = overall mean average per person prepaid expenditures

# On-Island Entire Travel Party – FY2017 Tracking



# On-Island Per Person – FY2017 Tracking



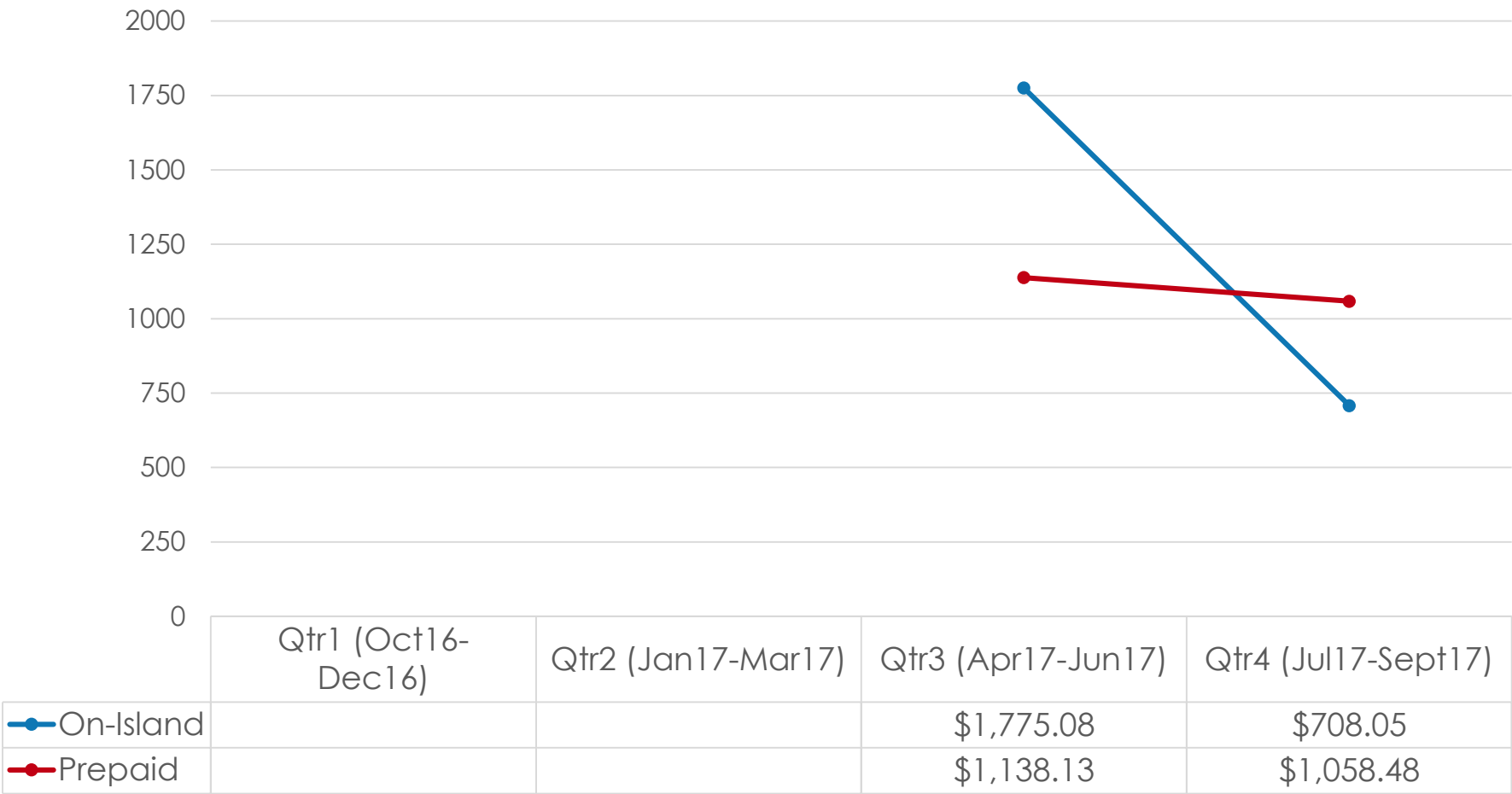
# On-Island Per Person – Key Segments

GVB EXIT SURVEY  
Q11A ONISLE EXPENDITURE- PER PERSON

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
ONISLE PP	Mean	\$708.05	\$750.22	\$696.44	.
	Median	\$500	\$500	\$500	.

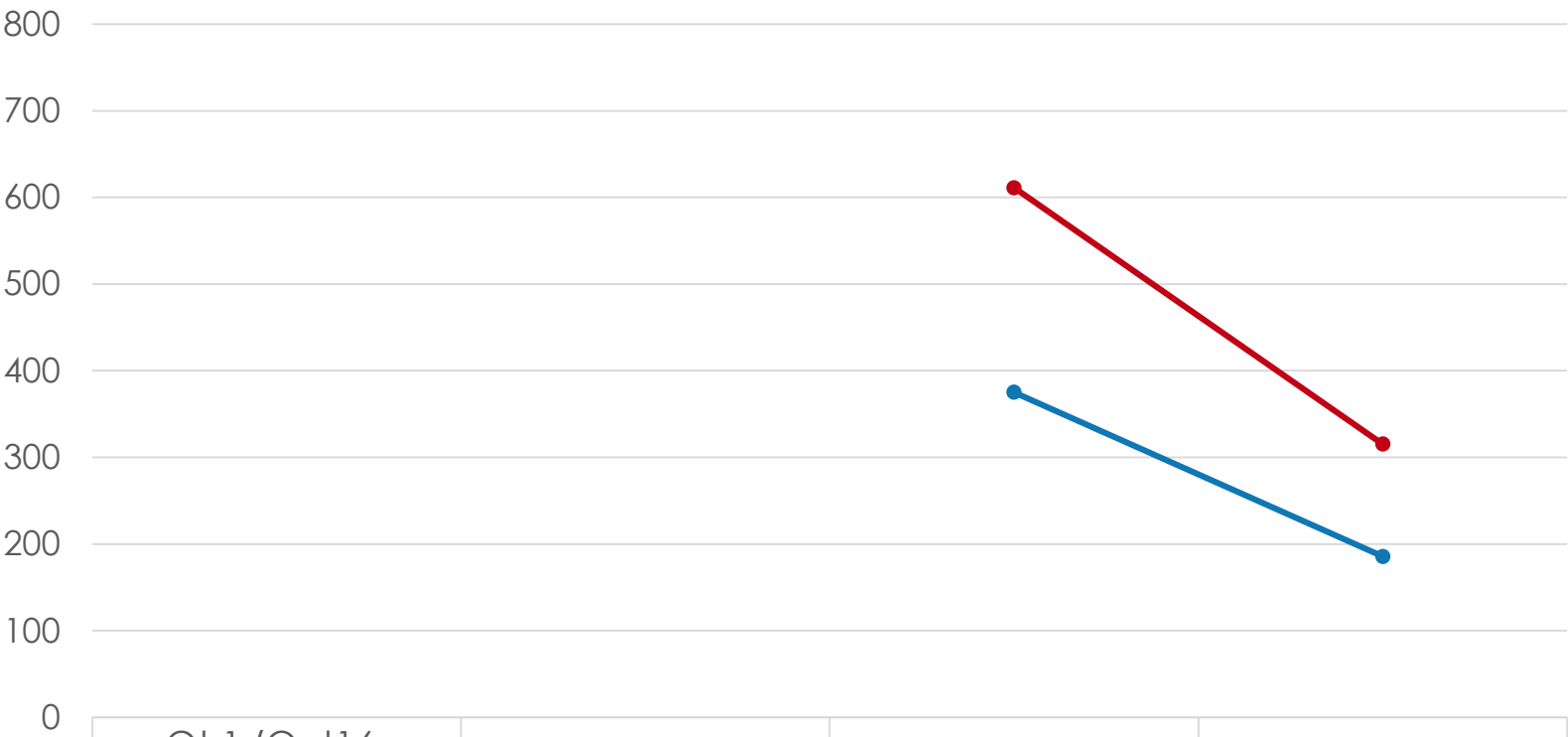
Prepared by Anthology Research

# Per Person MEAN expenditures – FY2017 Tracking On-Island/ Prepaid



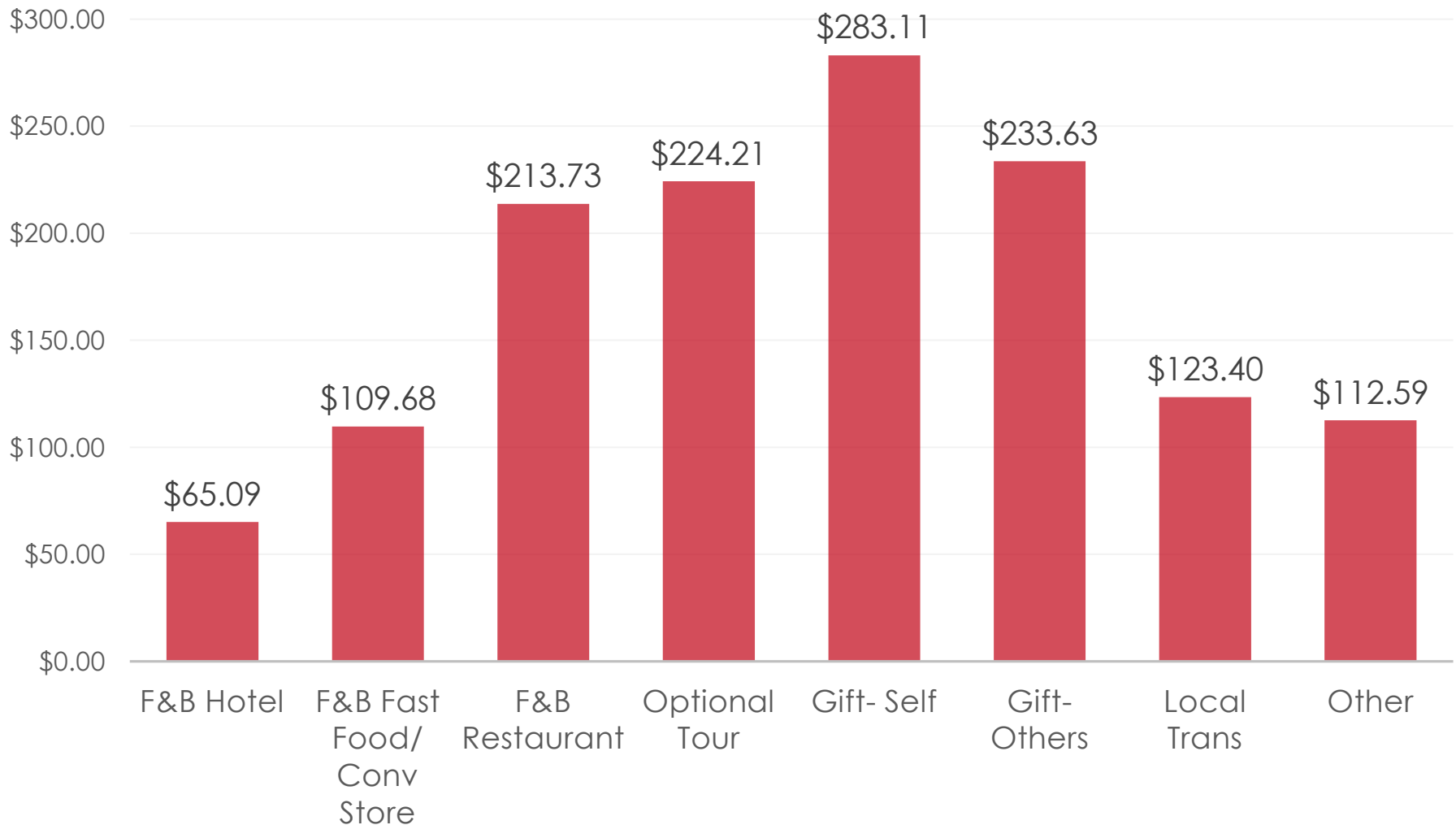
# On-Island Per Day Spending – FY2017 Tracking

## MEAN



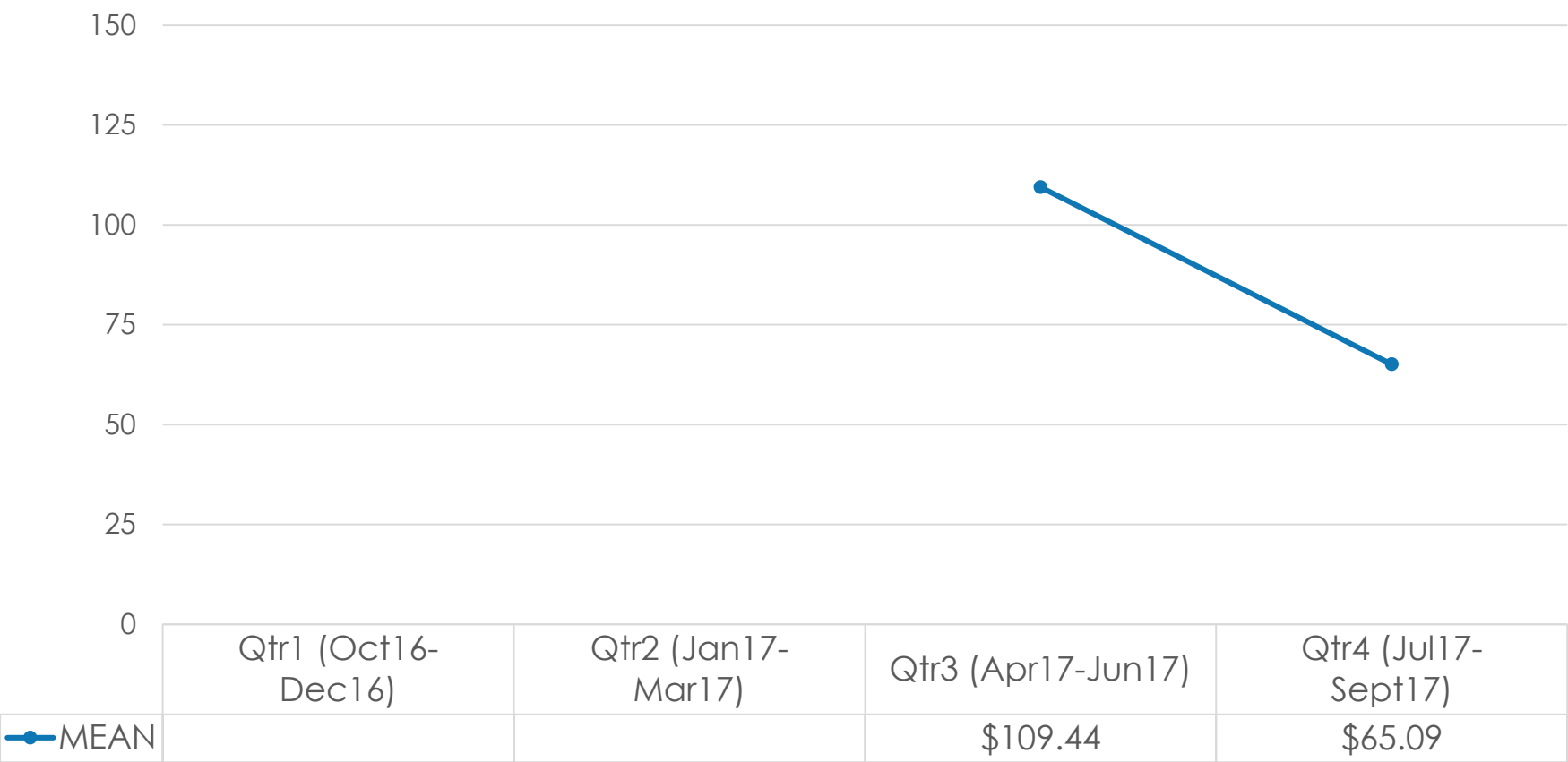
	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
Per Person			\$375.07	\$185.64
Travel Party			\$611.20	\$315.34

# On-Island Expenses by Category – MEAN Entire Travel Party



# On-Island – FY2017 Tracking

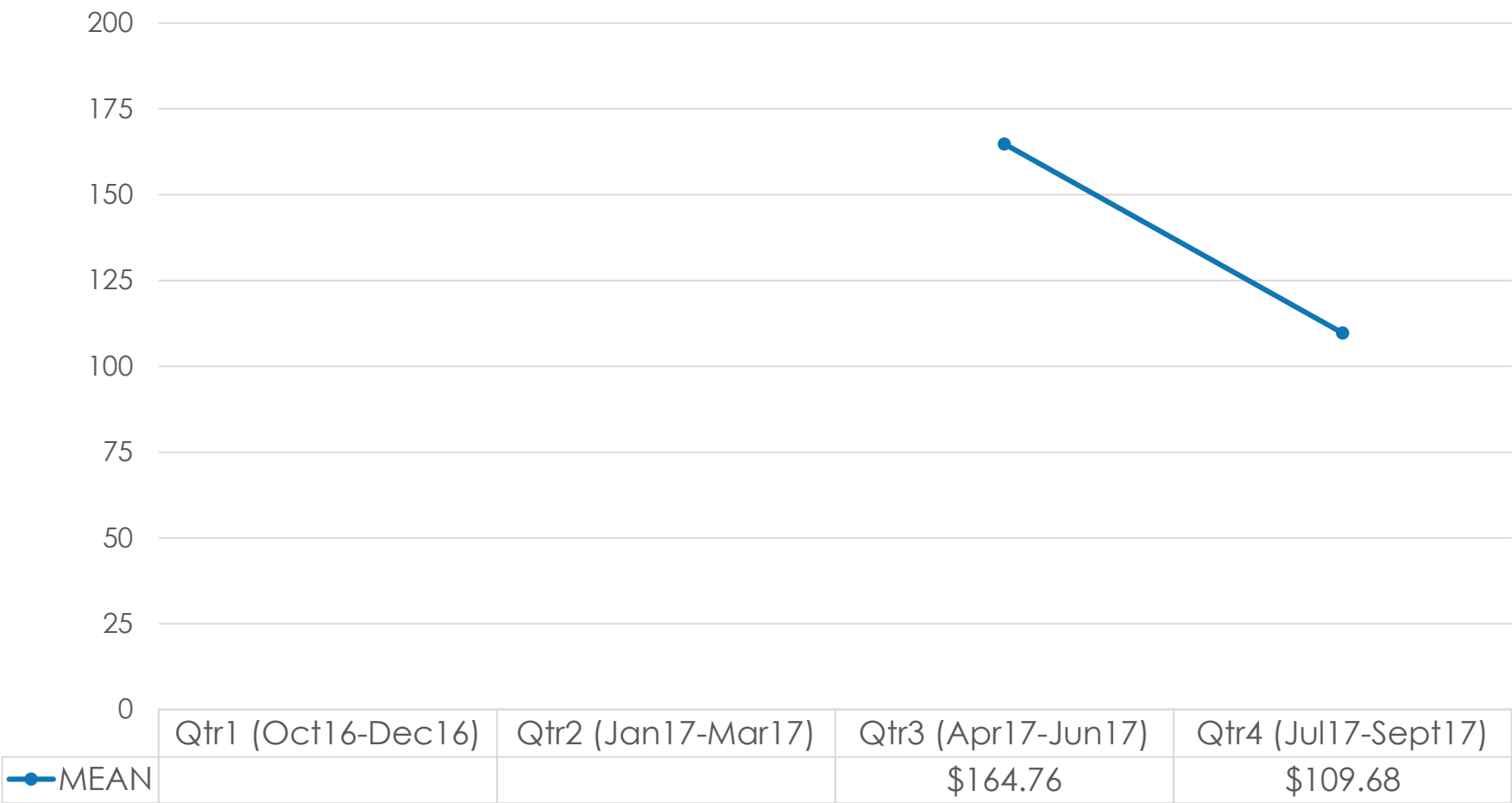
## Food & Beverage - Hotel





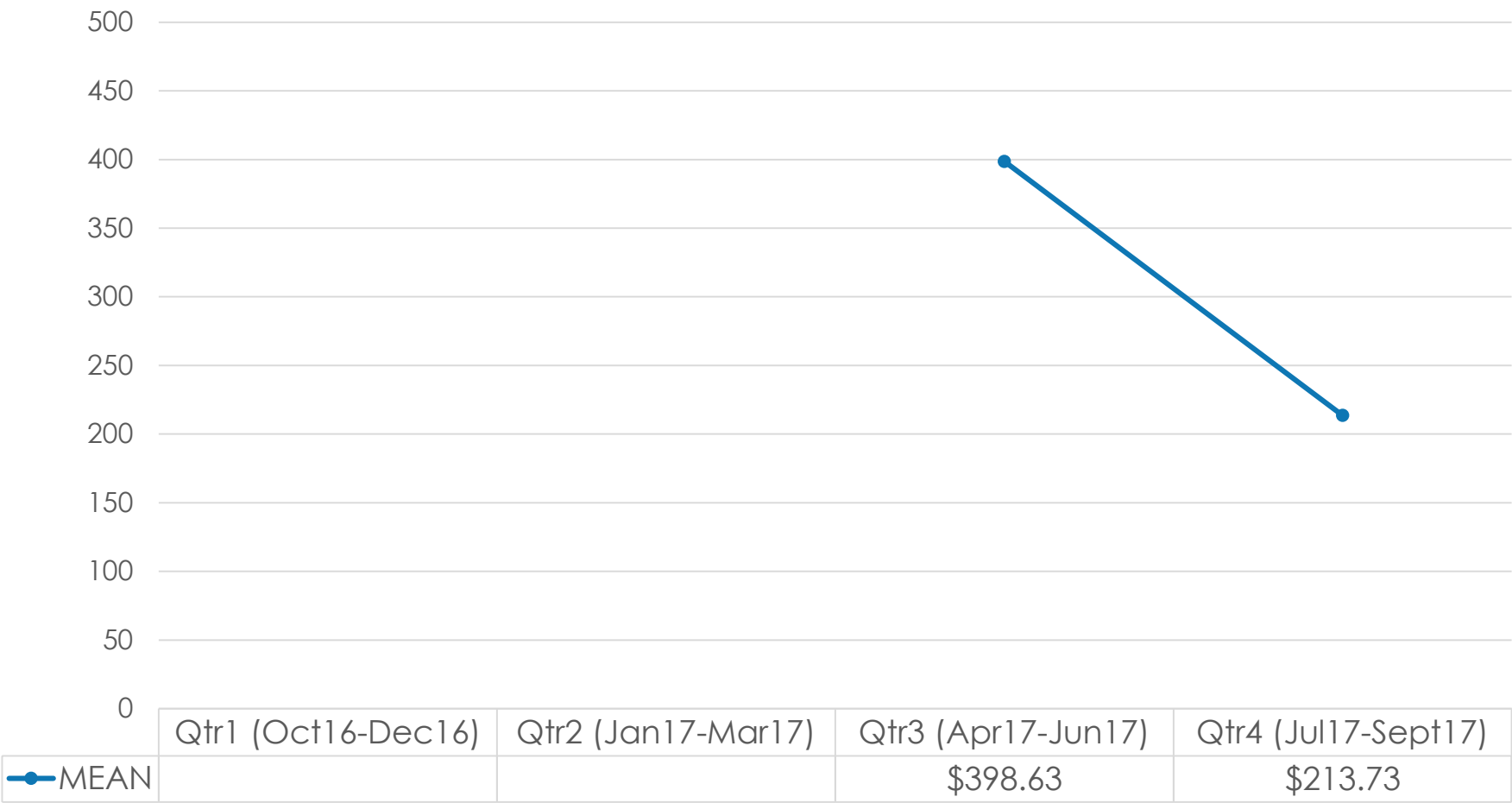
# On-Island – FY2017 Tracking

## Food & Beverage – Fast Food/ Convenience Store



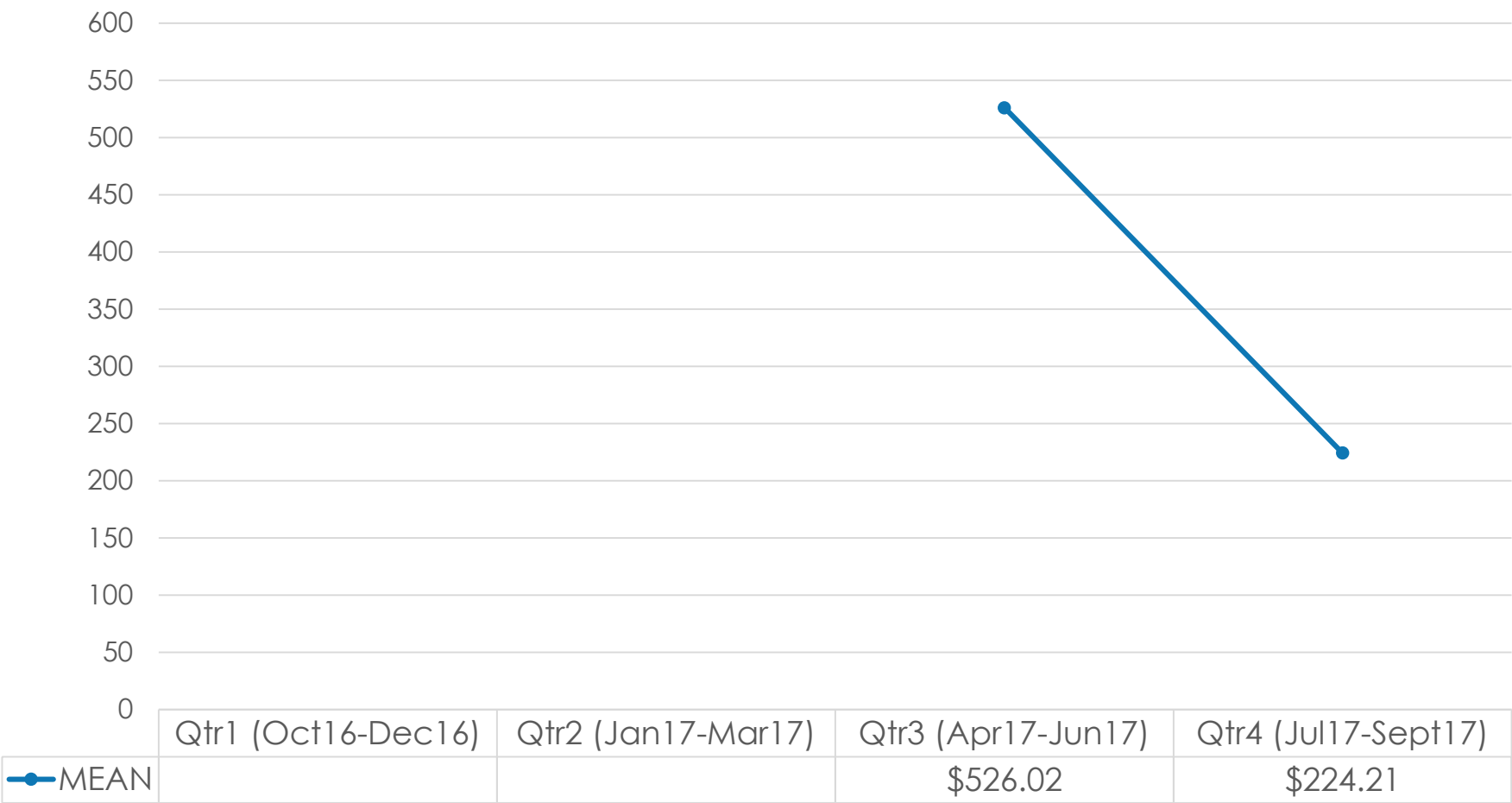
# On-Island – FY2017 Tracking

## Food & Beverage – Restaurant/ Drinking Est Outside Hotel



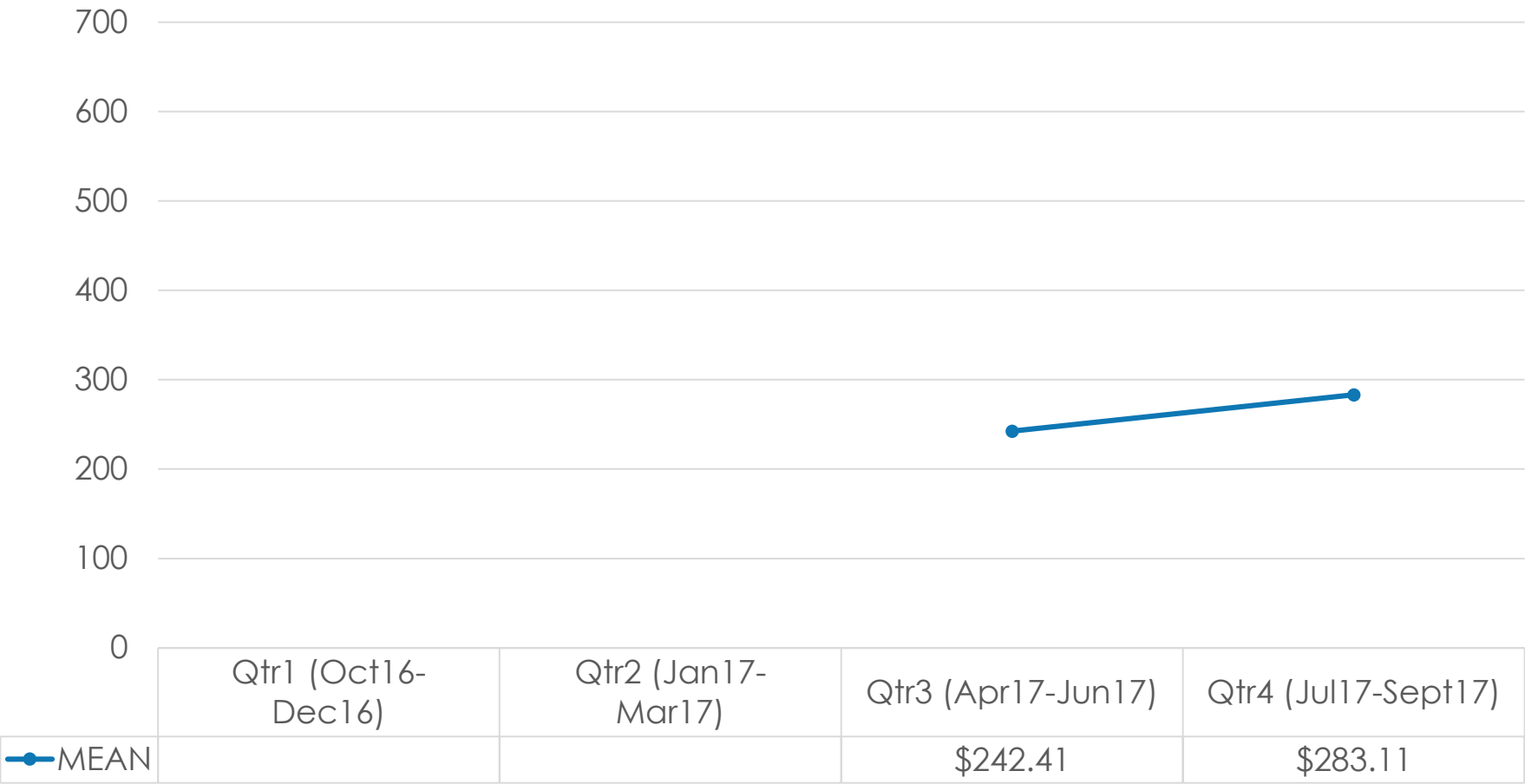
# On-Island – FY2017 Tracking

## Optional tour/ Activities



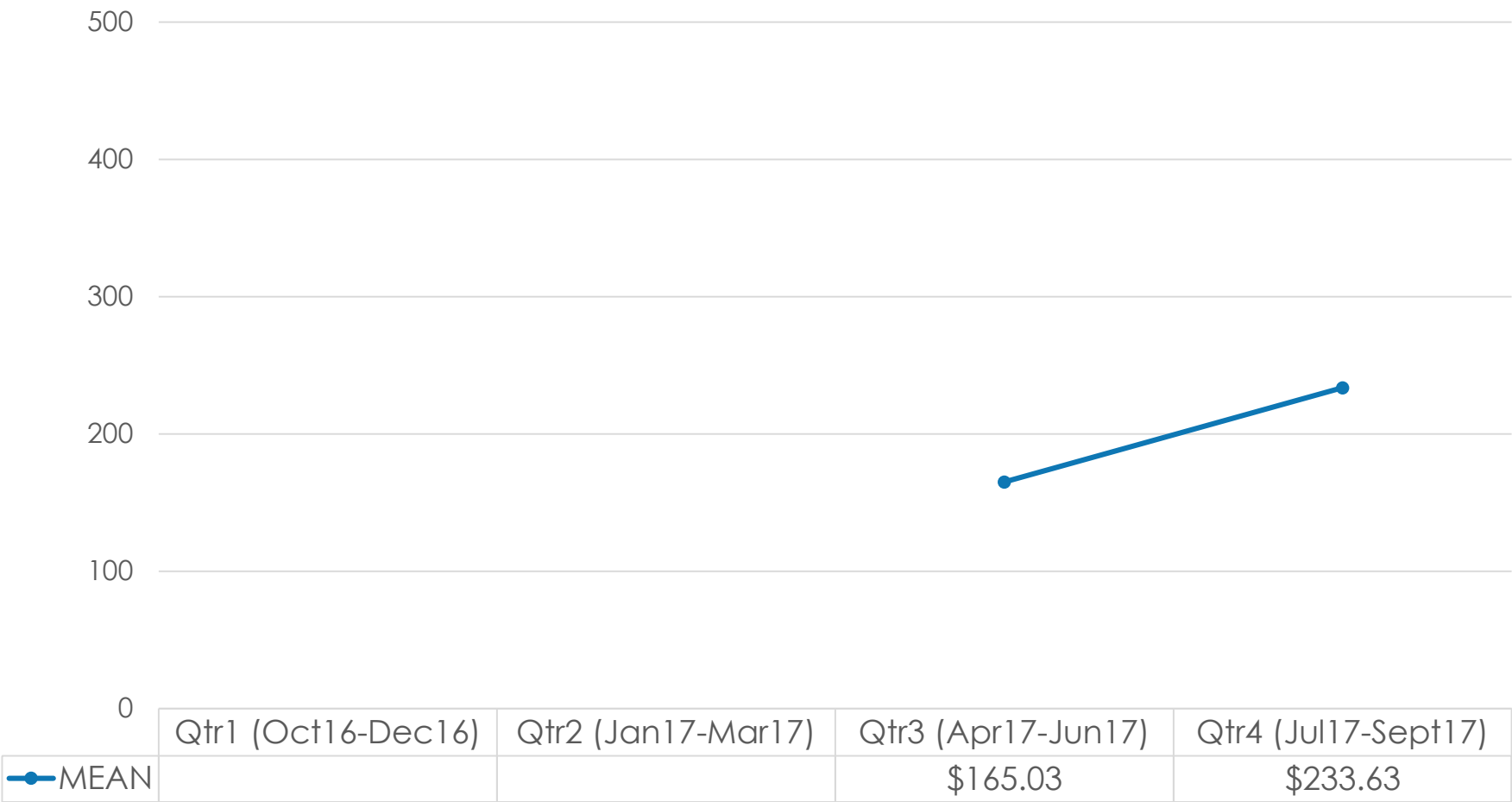
# On-Island – FY2017 Tracking

## Gift/ Souvenir – Self/ Companion



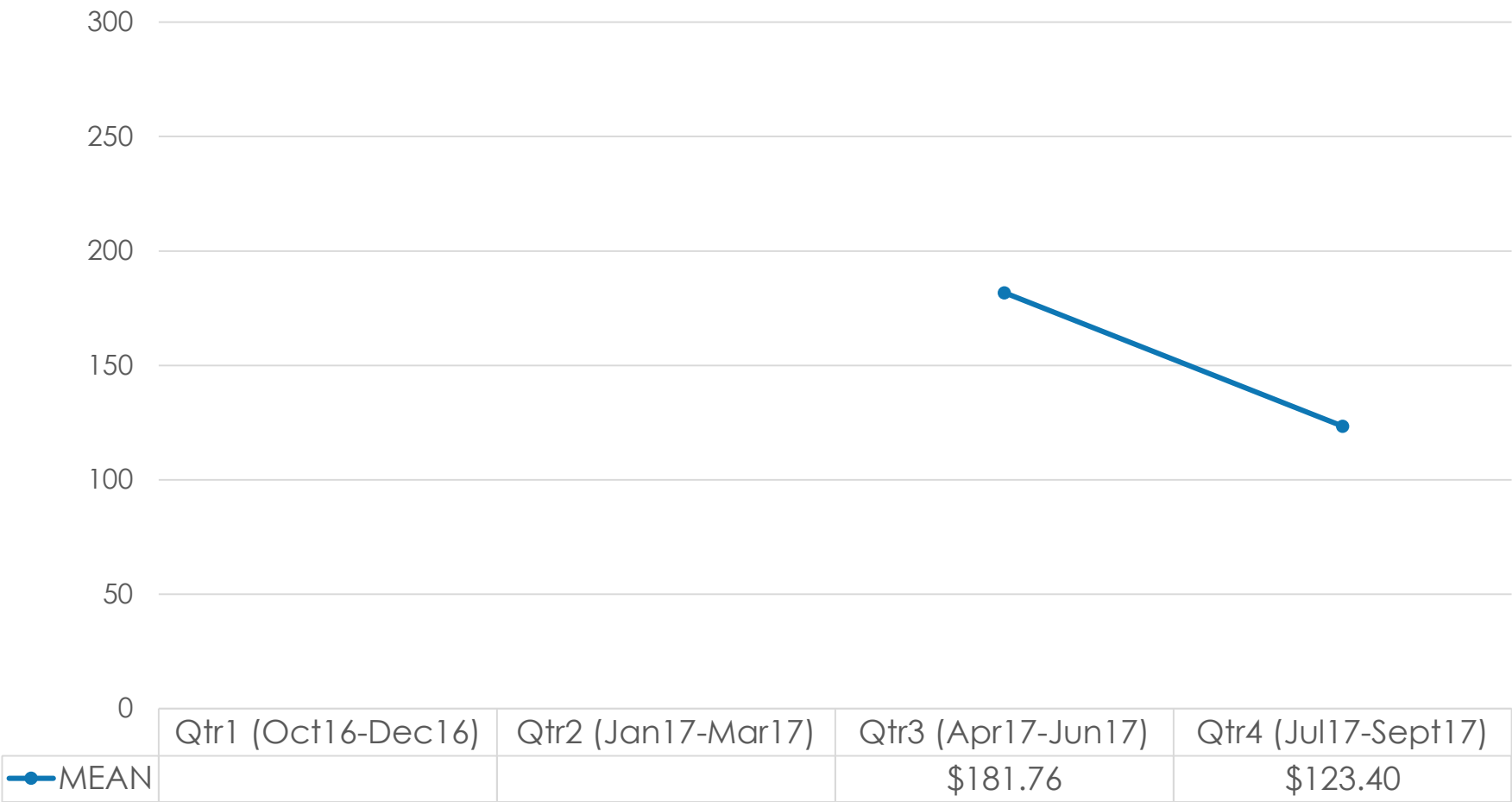
# On-Island – FY2017 Tracking

## Gift/ Souvenir – Friends/ Family



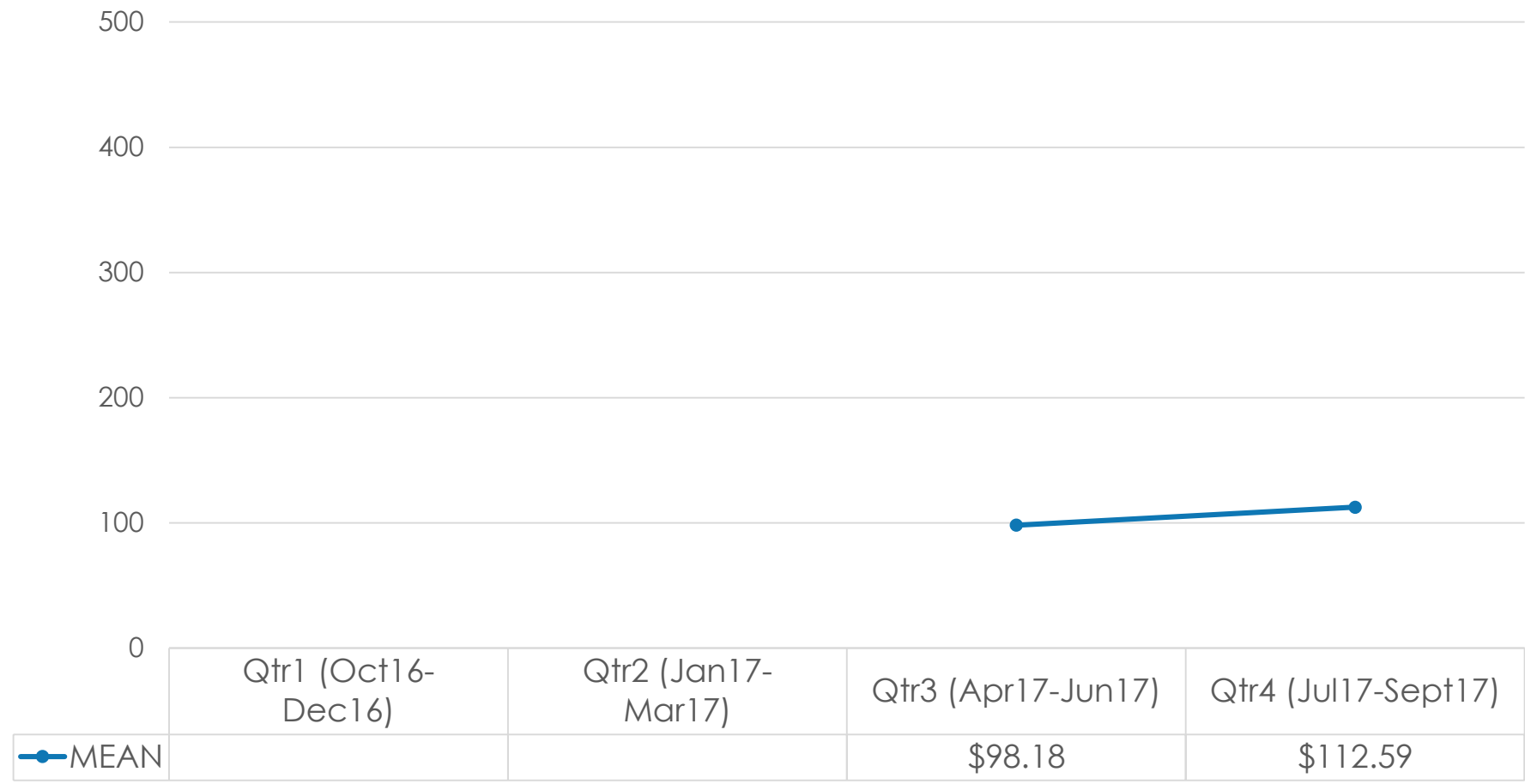
# On-Island – FY2017 Tracking

## Local Transportation



# On-Island – FY2017 Tracking

## Other Not Included

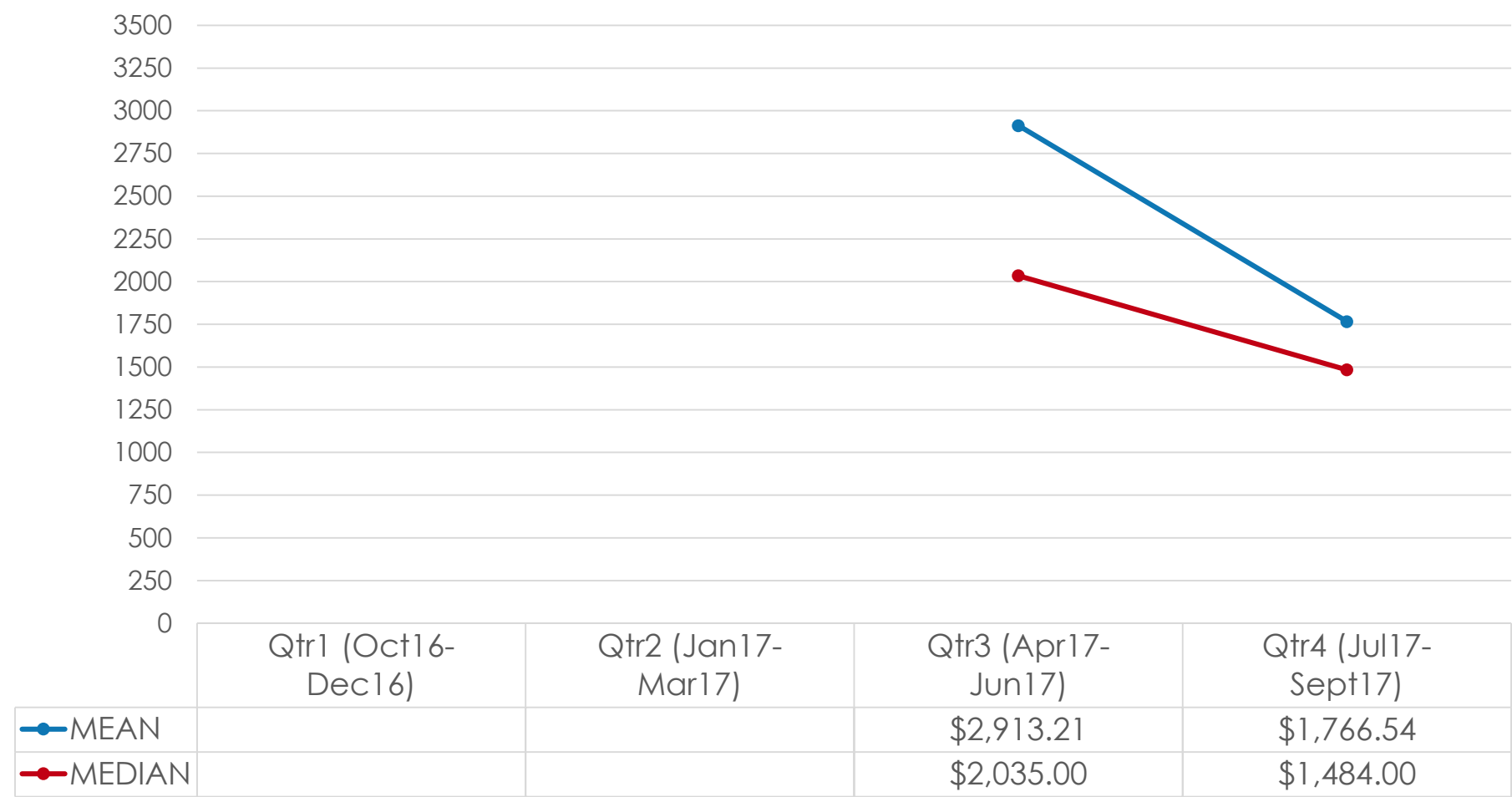


# TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,766.54 = overall mean average prepaid expense by respondent/ Per Person



# TOTAL Per Person Expenditures – FY2017 Tracking



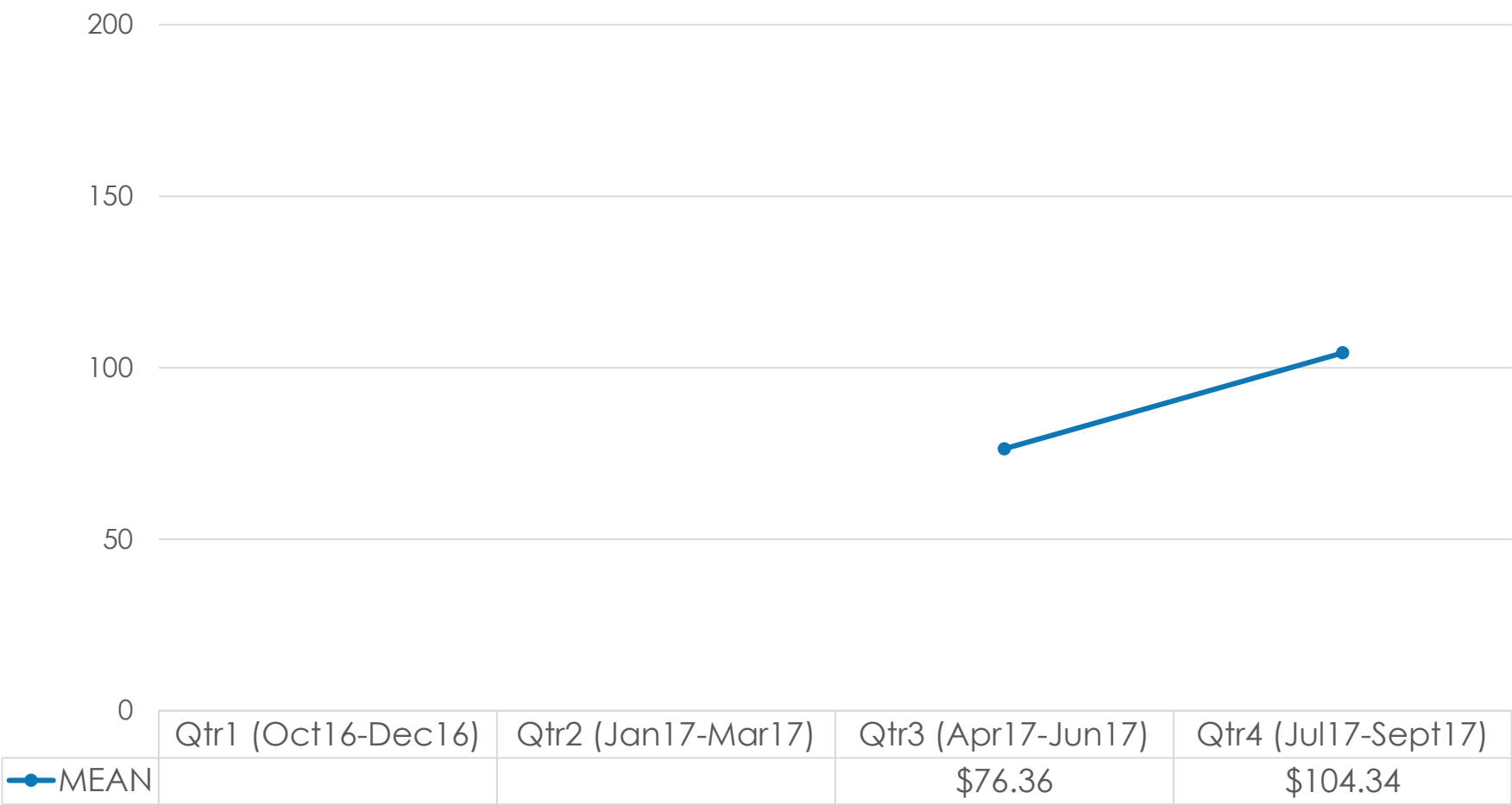
# TOTAL Per Person Expenditures – Key Segments

**GVB EXIT SURVEY  
TOTAL PER PERSON SPENDING**

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
TOTAL PP	Mean	\$1,766.54	\$1,793.49	\$1,723.59	.
	Median	\$1,484	\$1,444	\$1,487	.

Prepared by Anthology Research

# GUAM AIRPORT EXPENDITURE – FY2017 Tracking

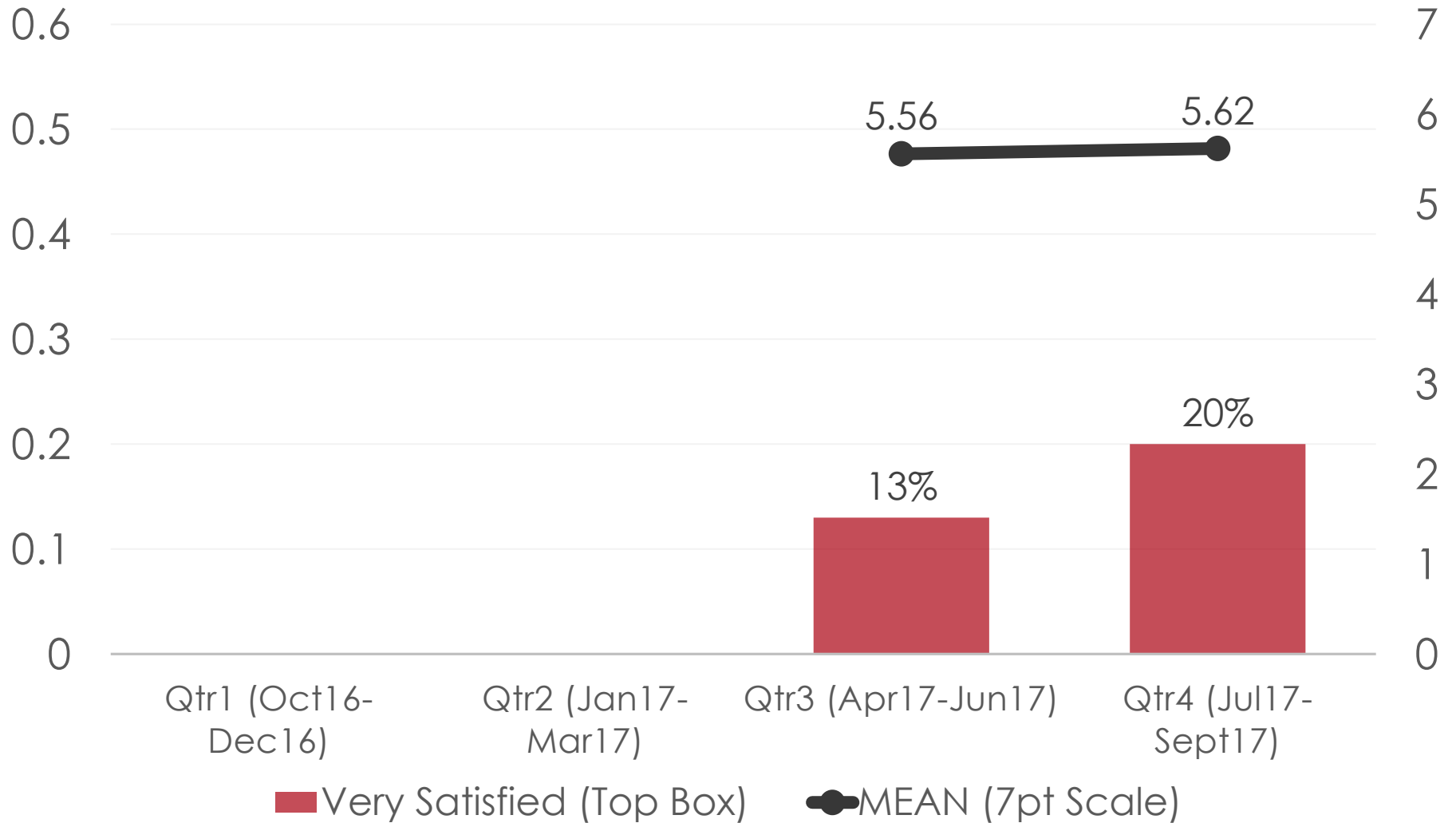


# SECTION 4

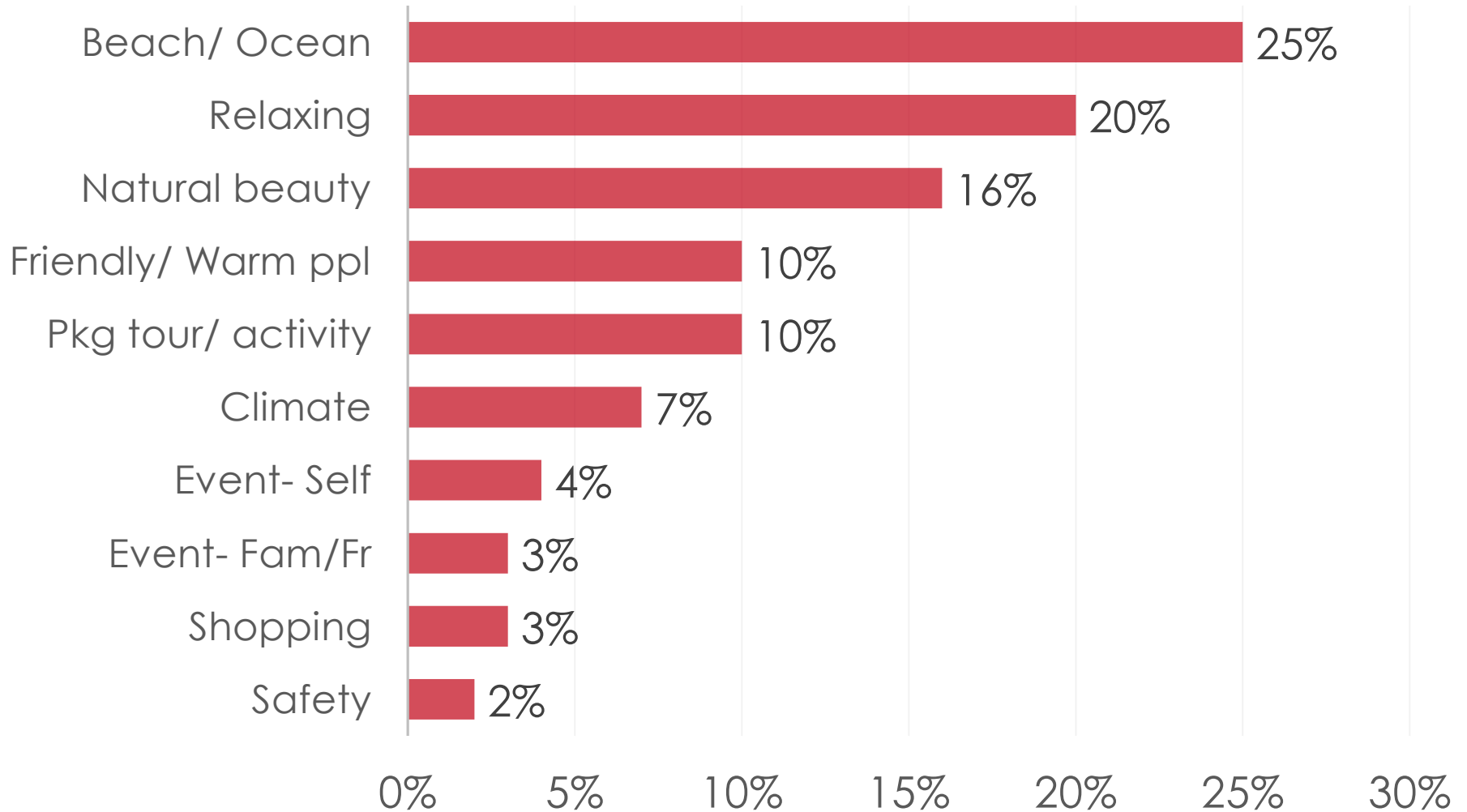
## VISITOR SATISFACTION

### BEHAVIOR

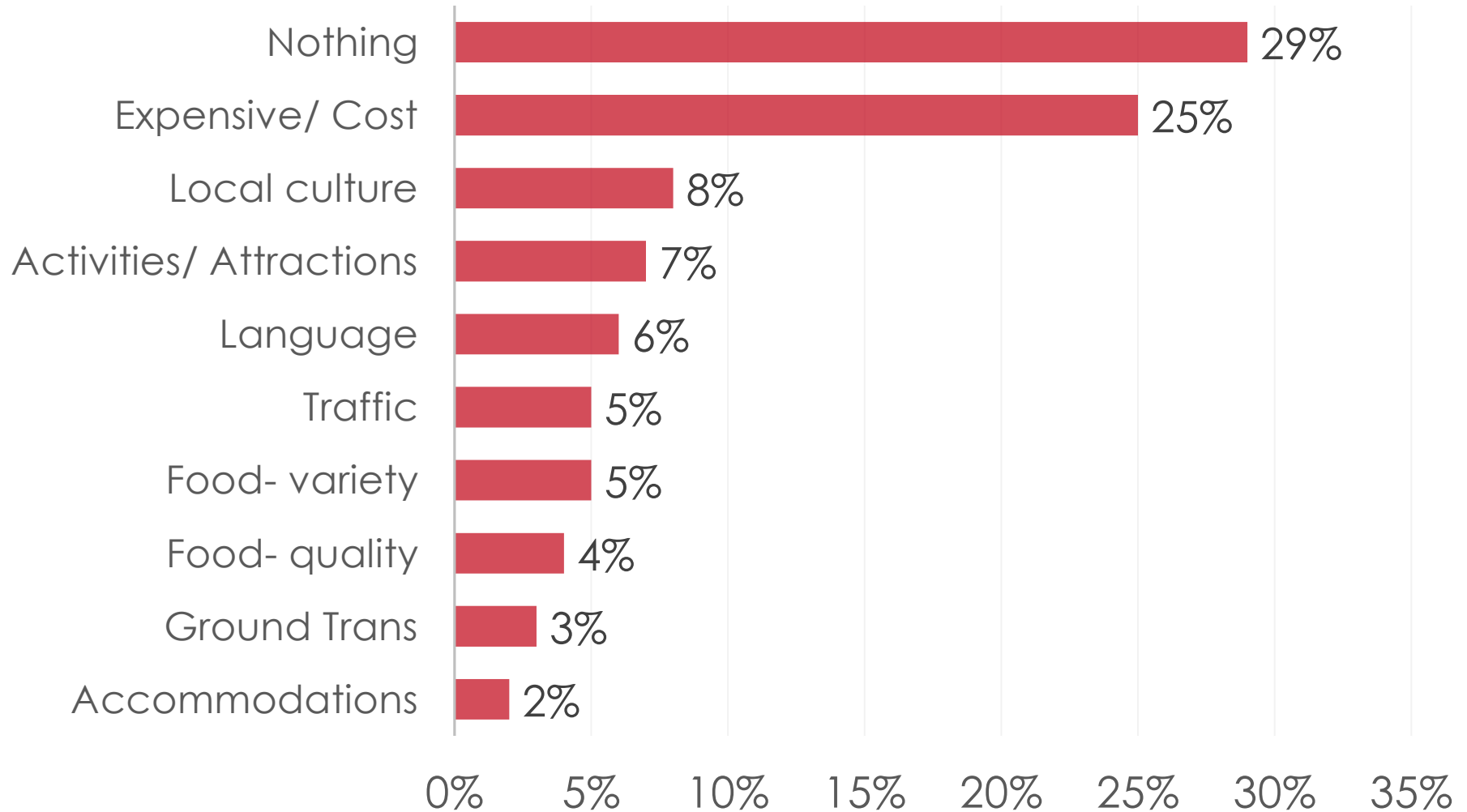
# OVERALL SATISFACTION



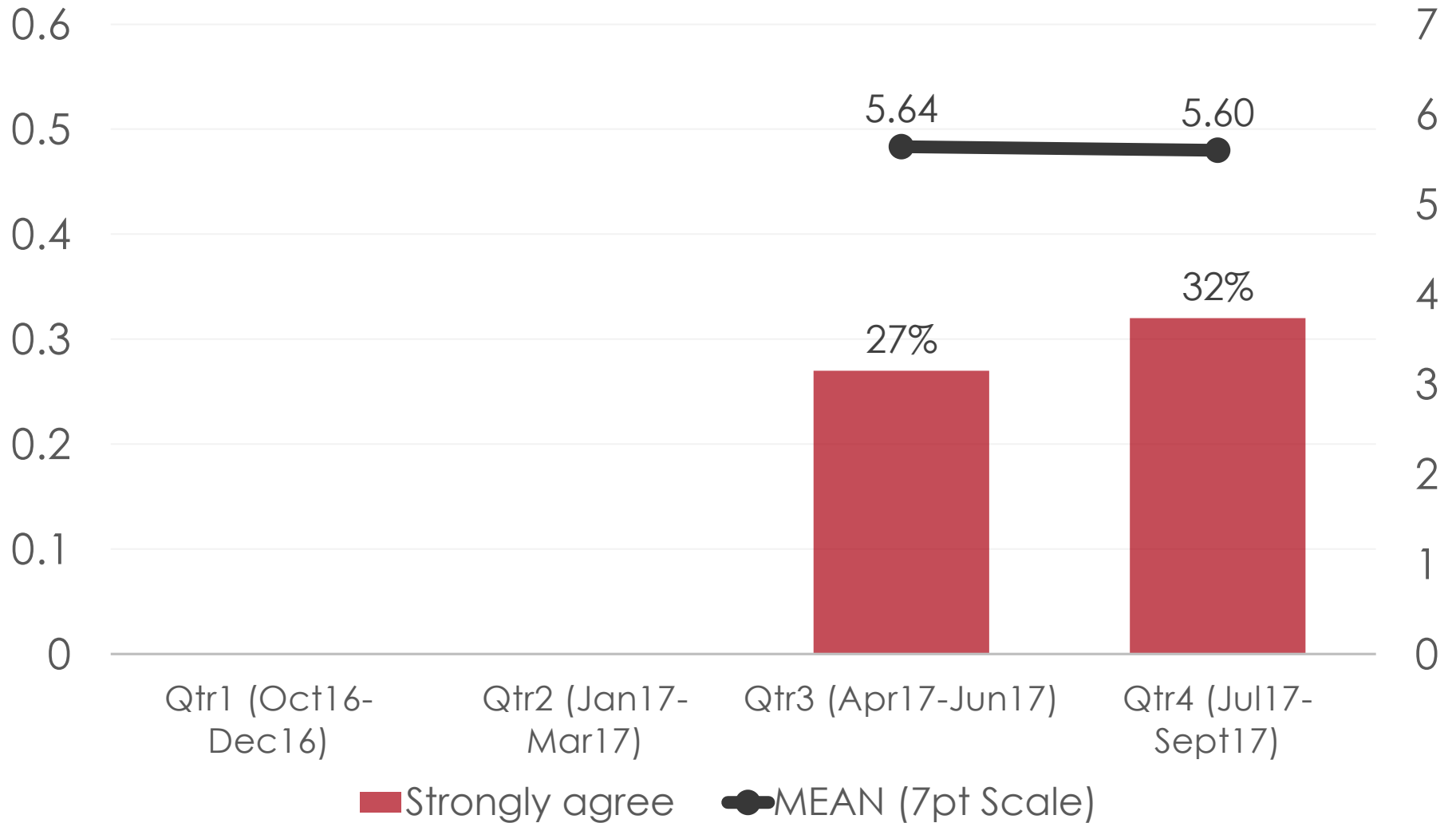
# Positive Aspect of Trip



# Negative Aspect of Trip

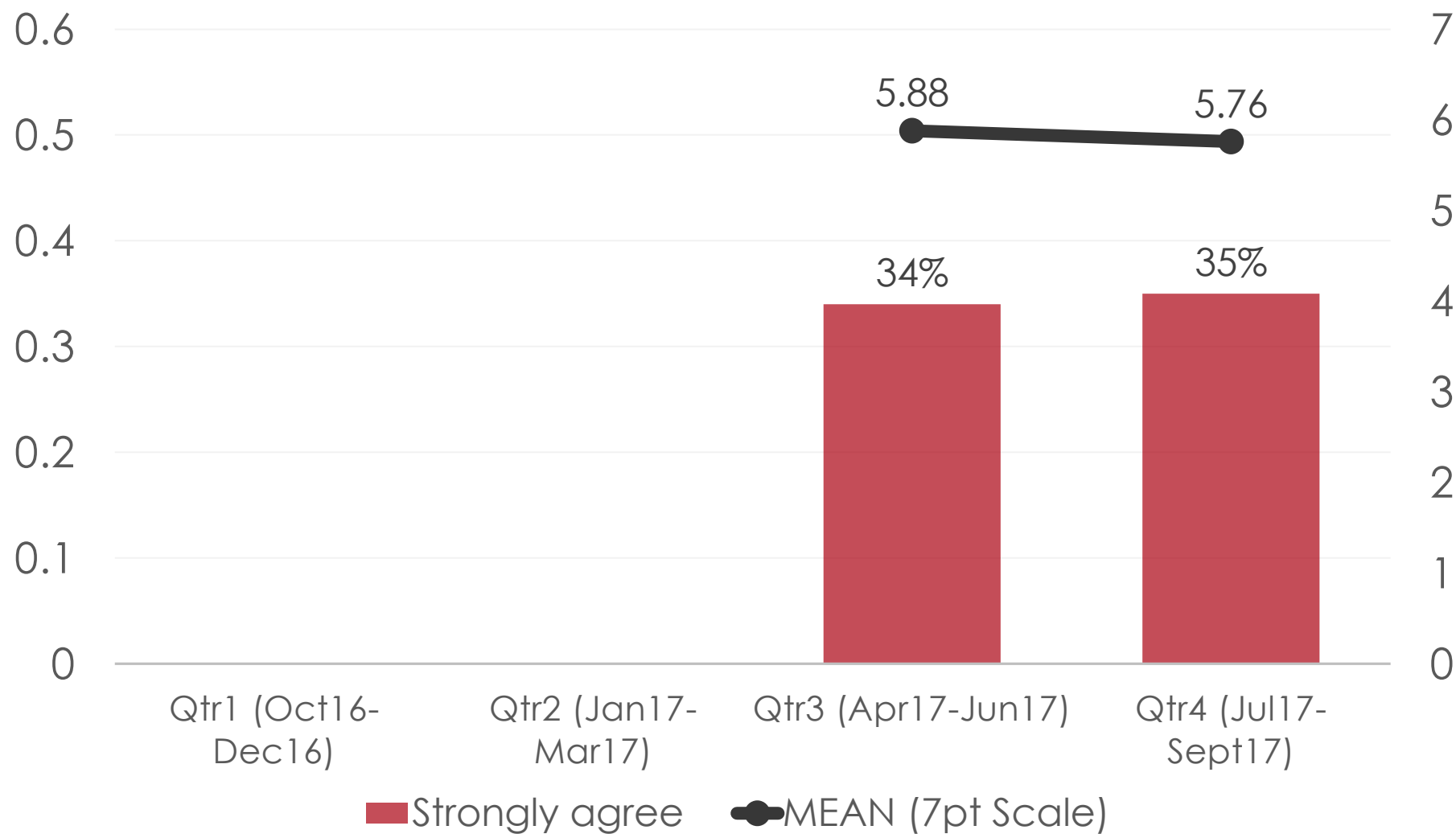


# Guam was better than expected

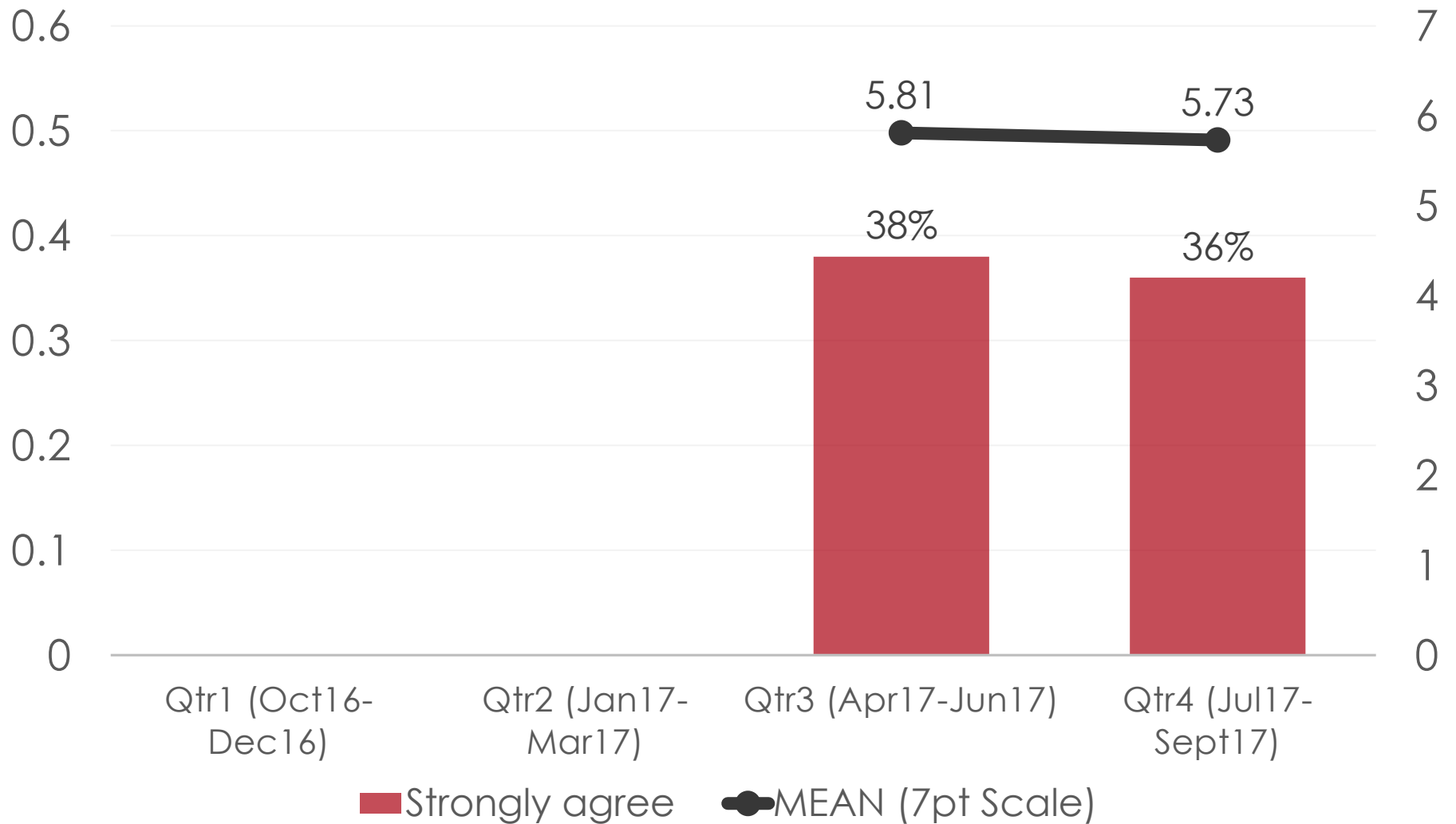




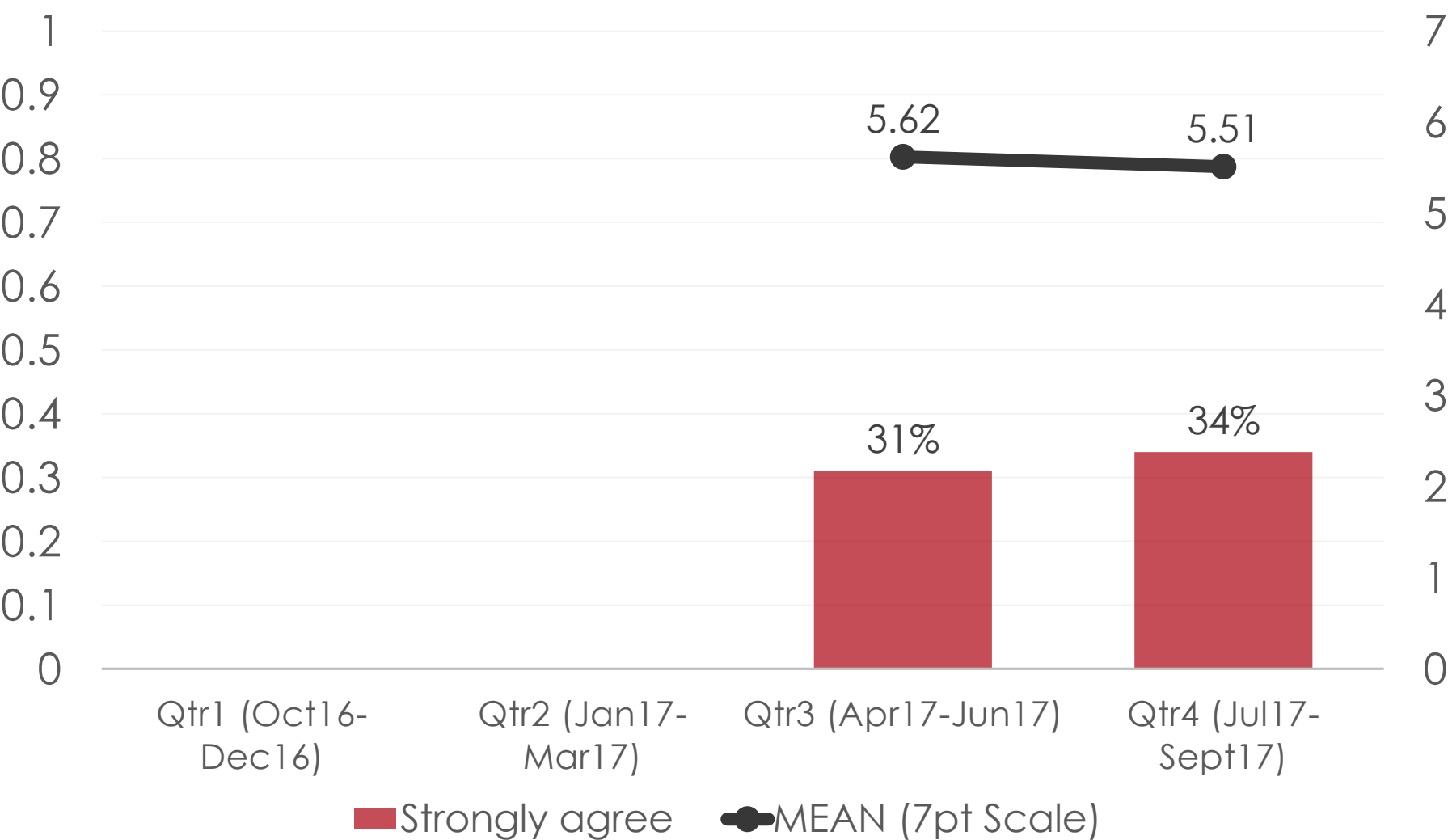
# I had no communication problems



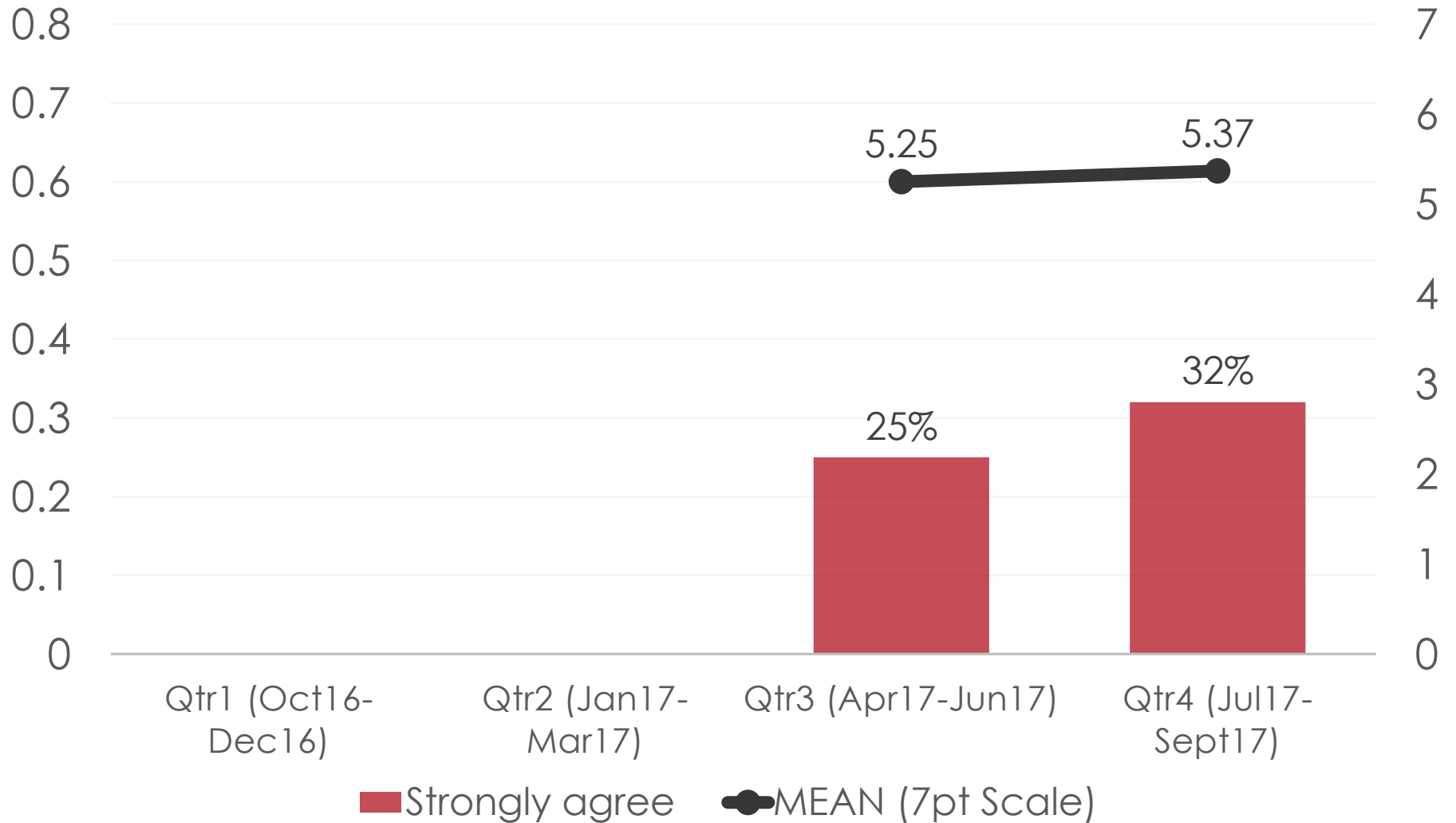
# I will recommend Guam to friends



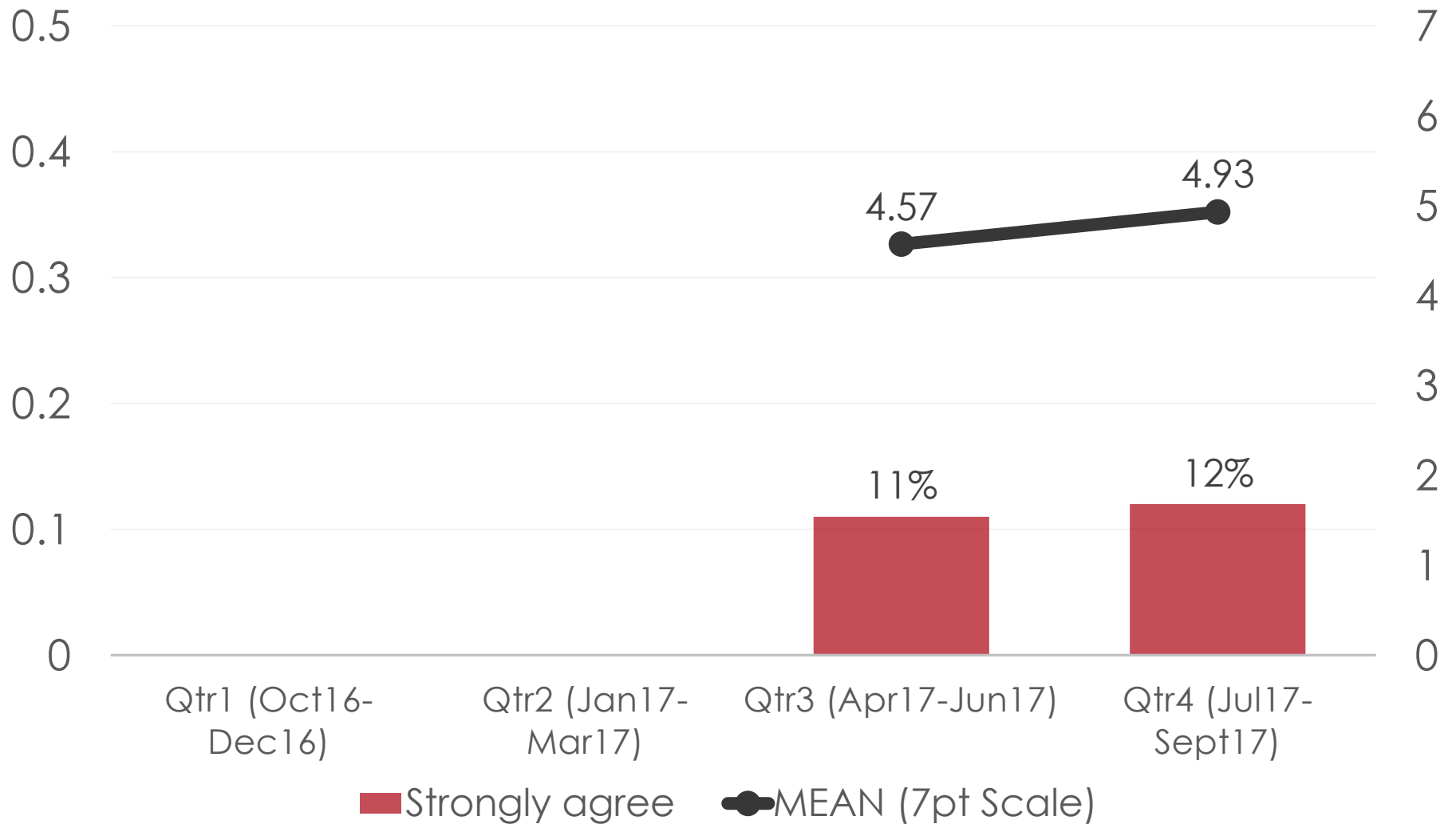
# Sites on Guam were attractive



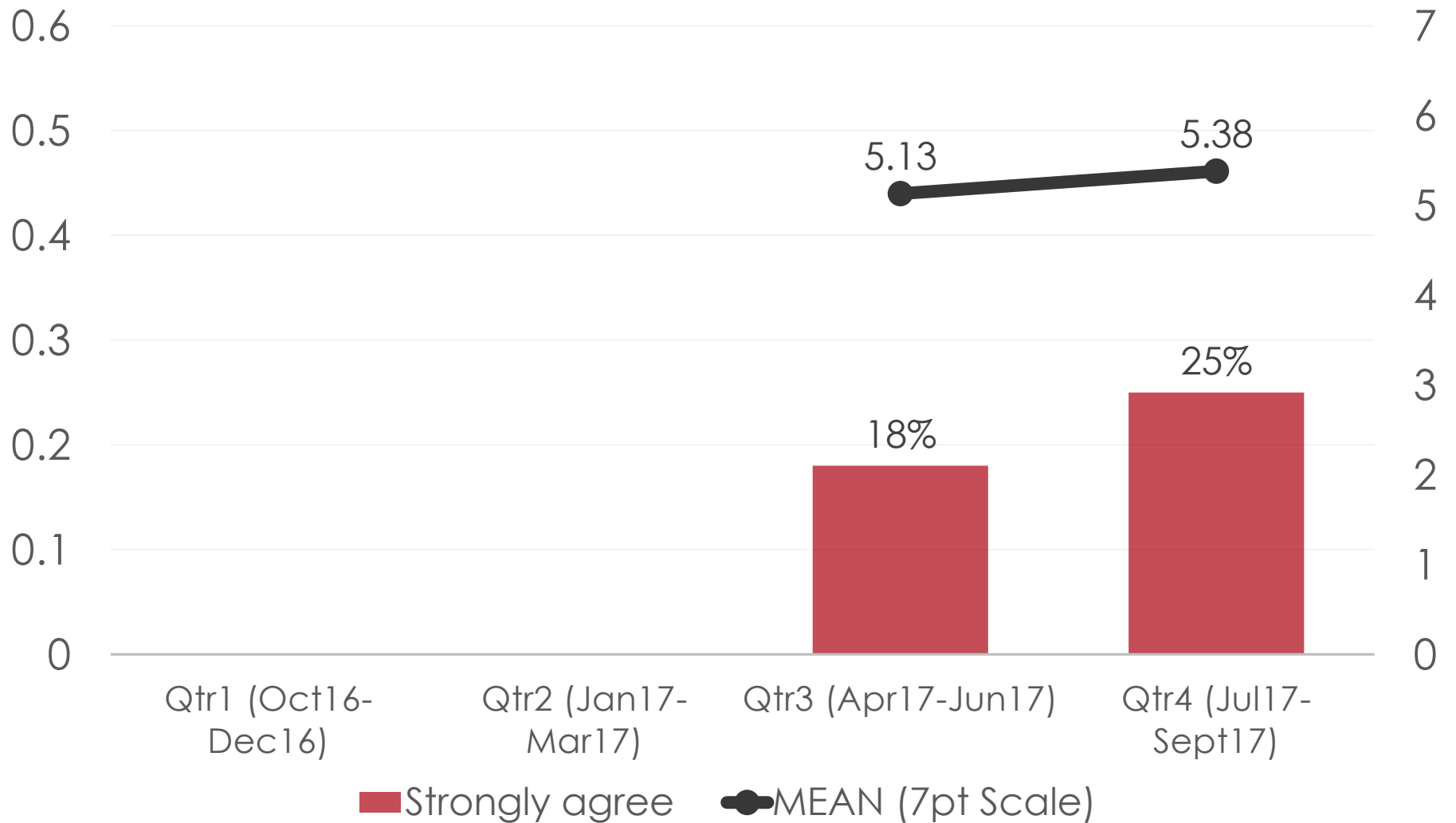
# I plan to visit Guam again



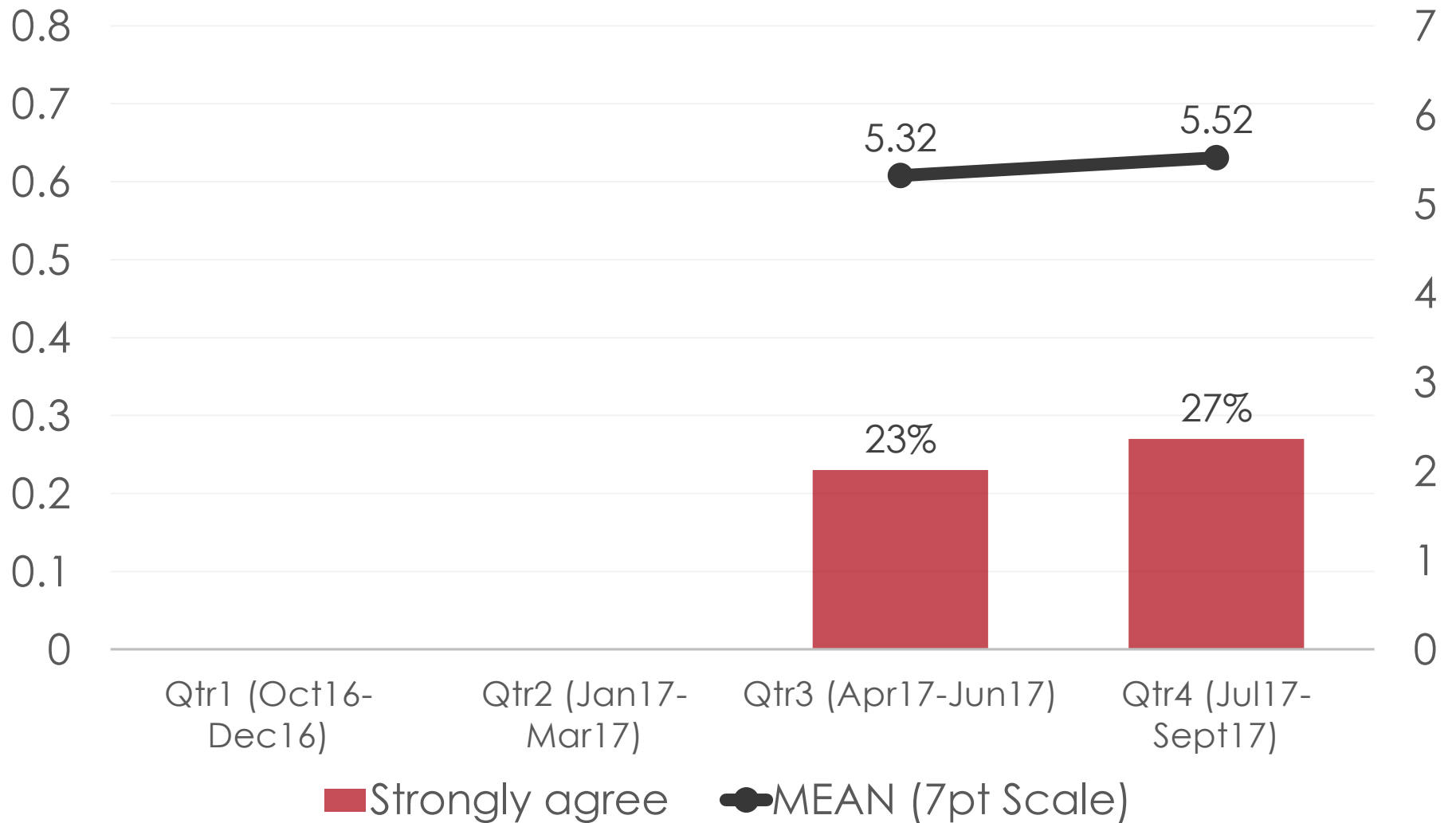
# Not enough night time activities



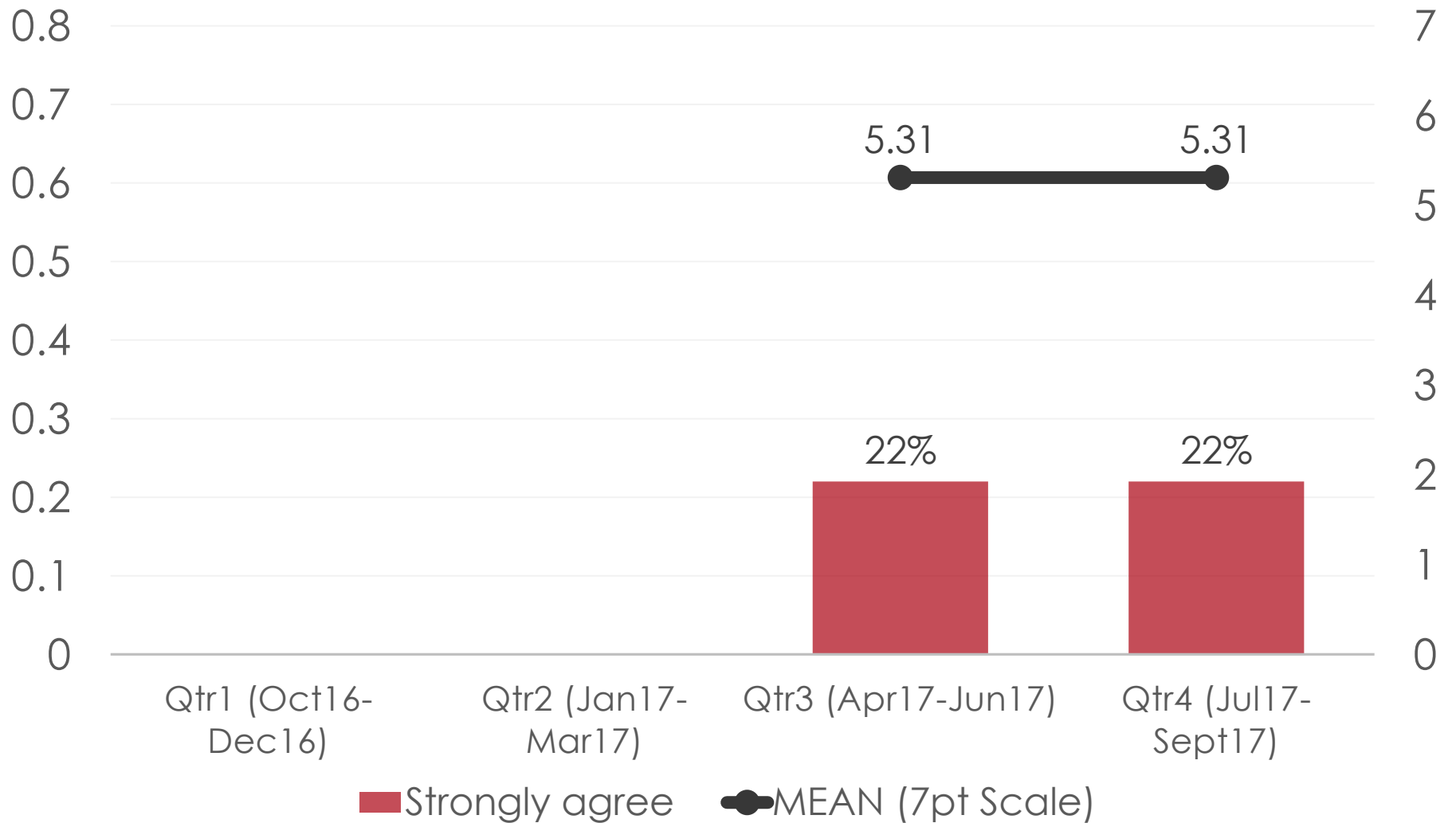
# Tour guides were professional



# Tour drivers were professional

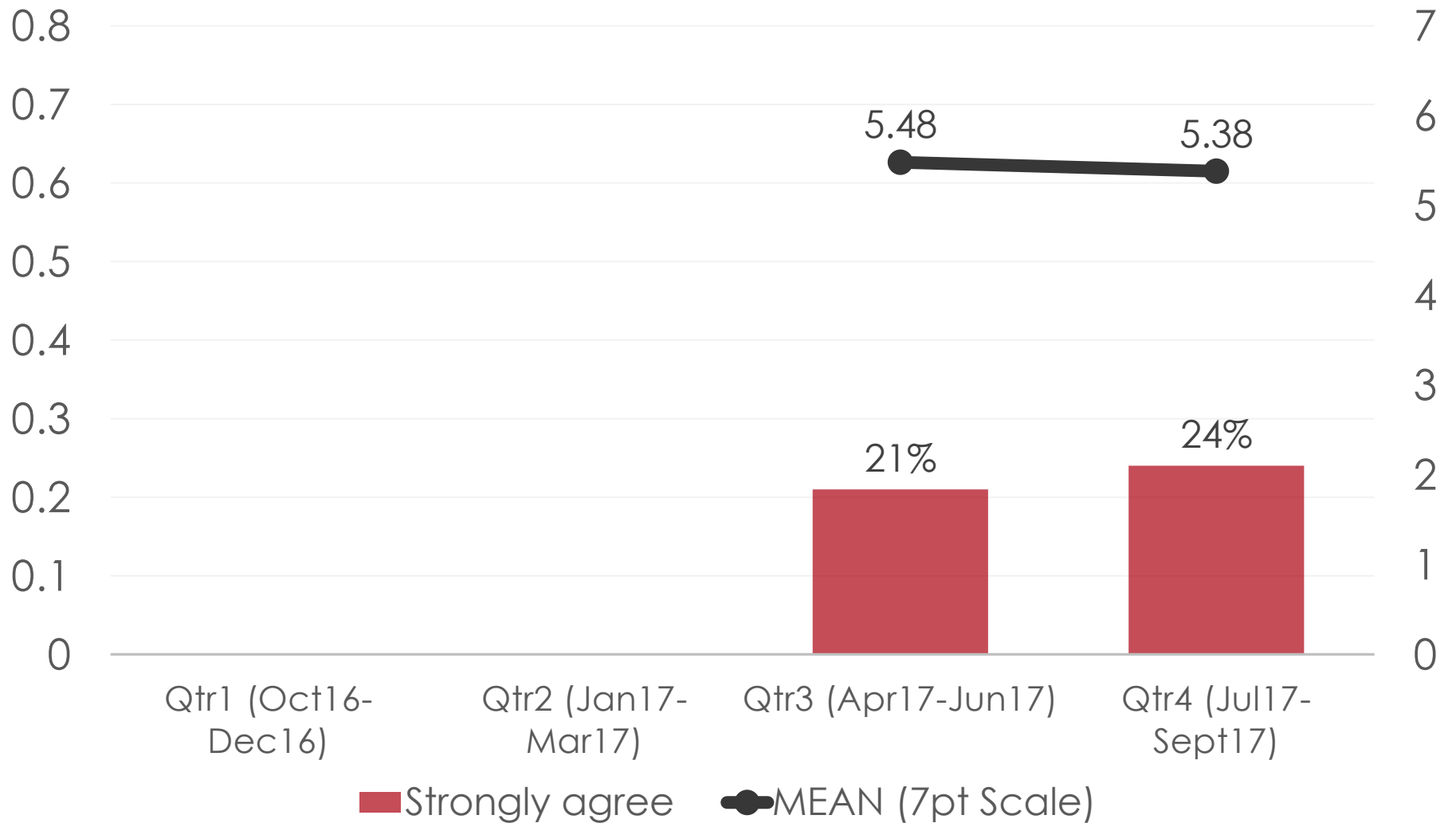


# Taxi drivers were professional

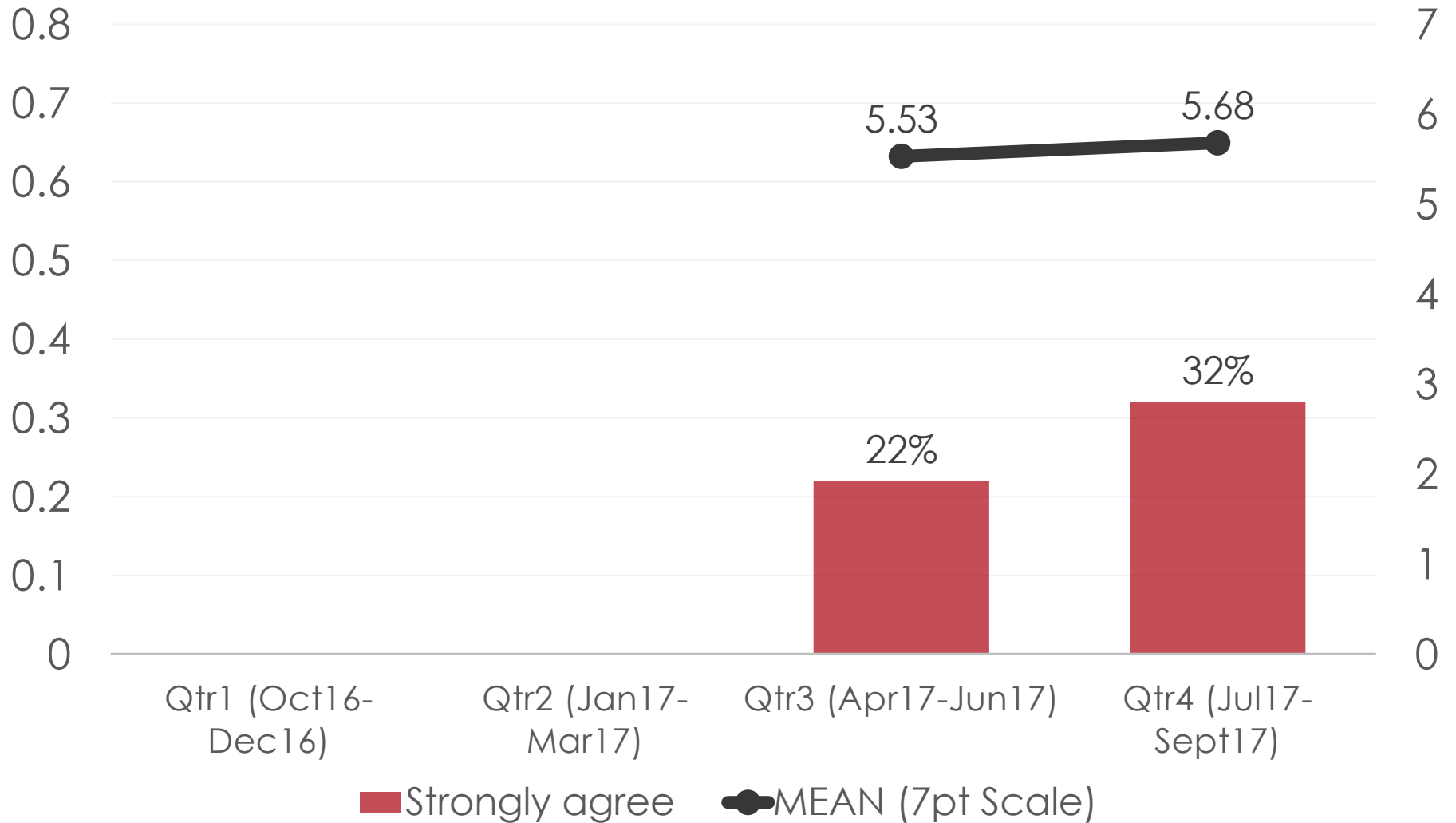




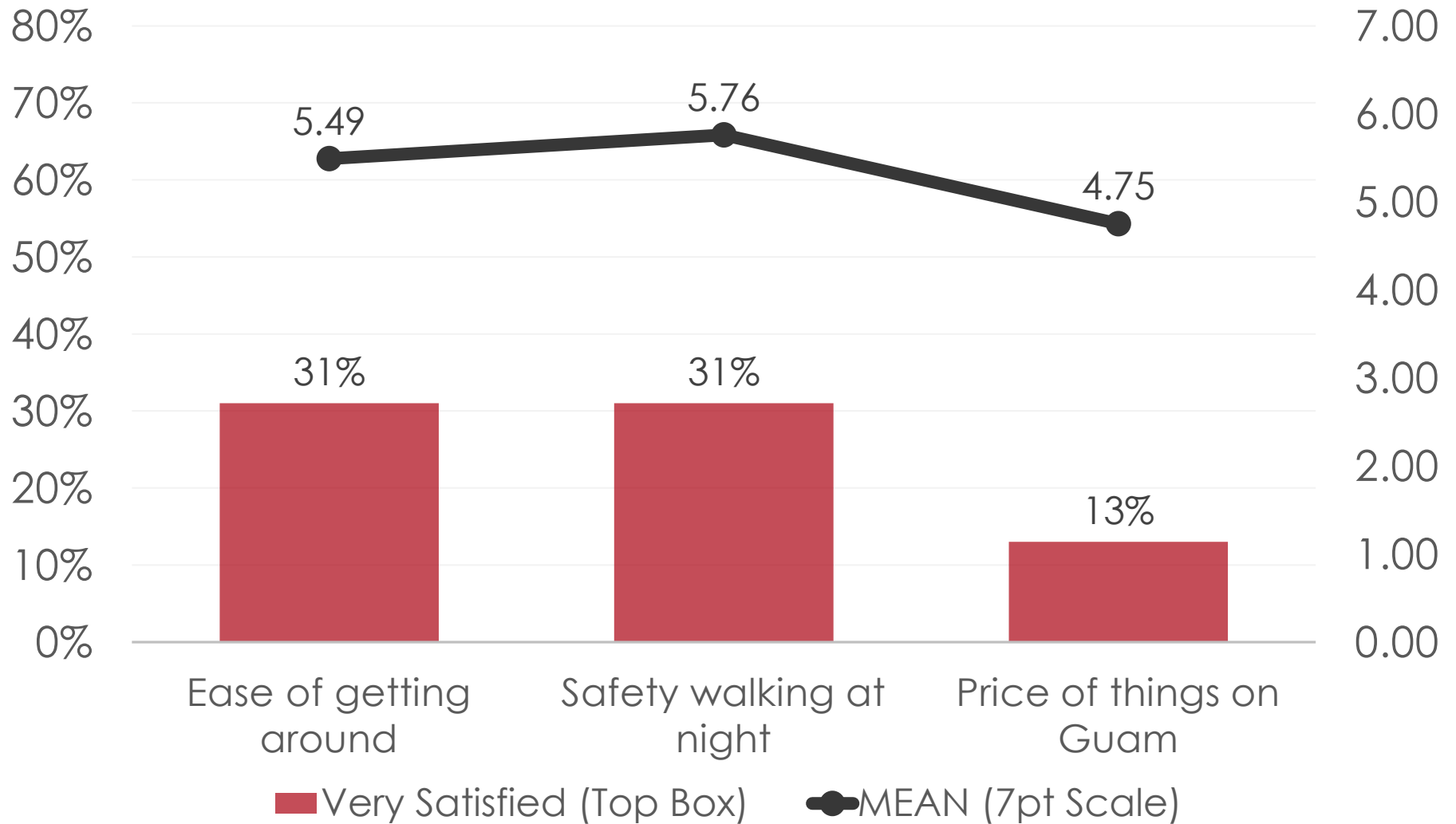
# Taxis were clean



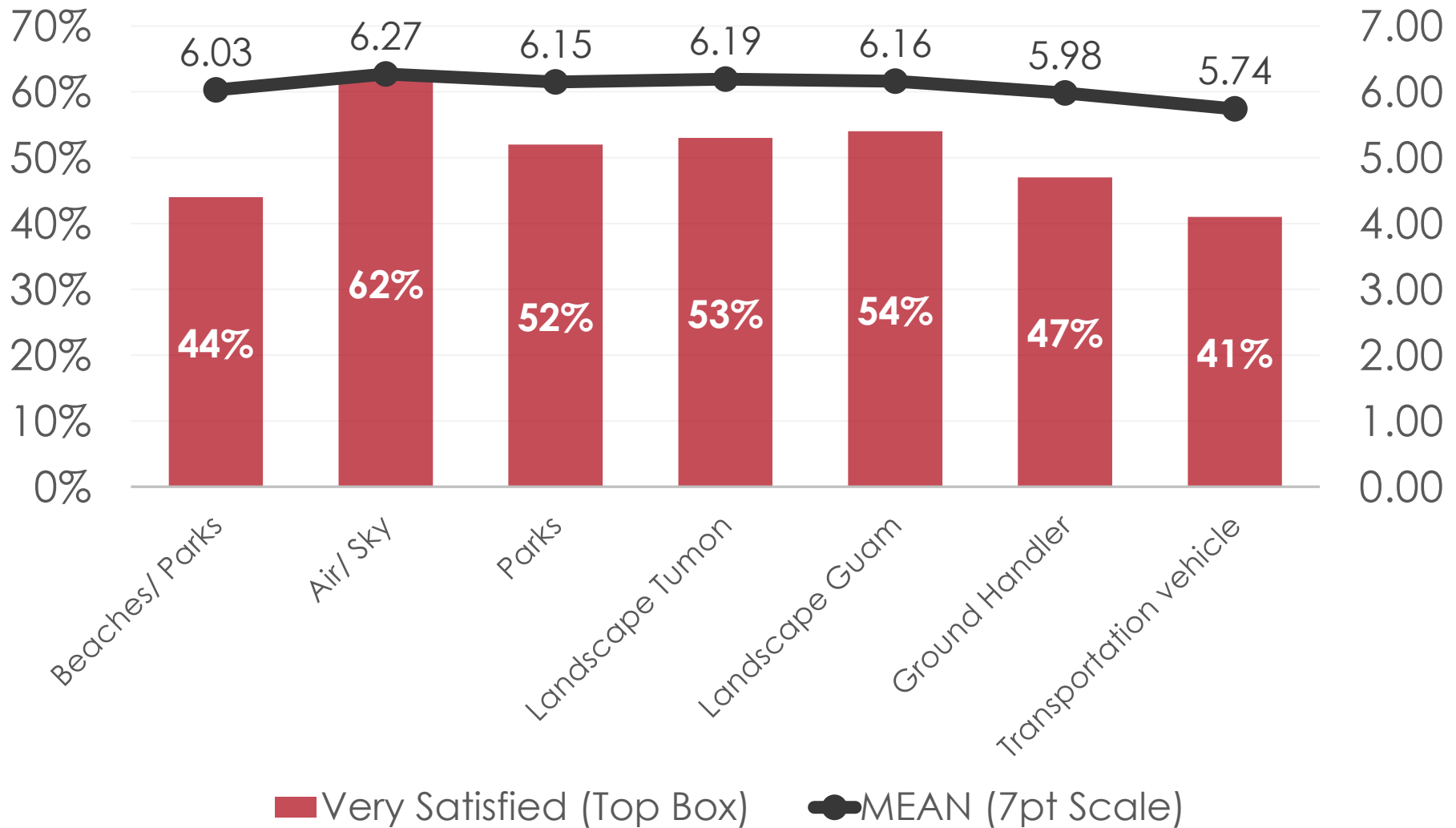
# Guam airport was clean



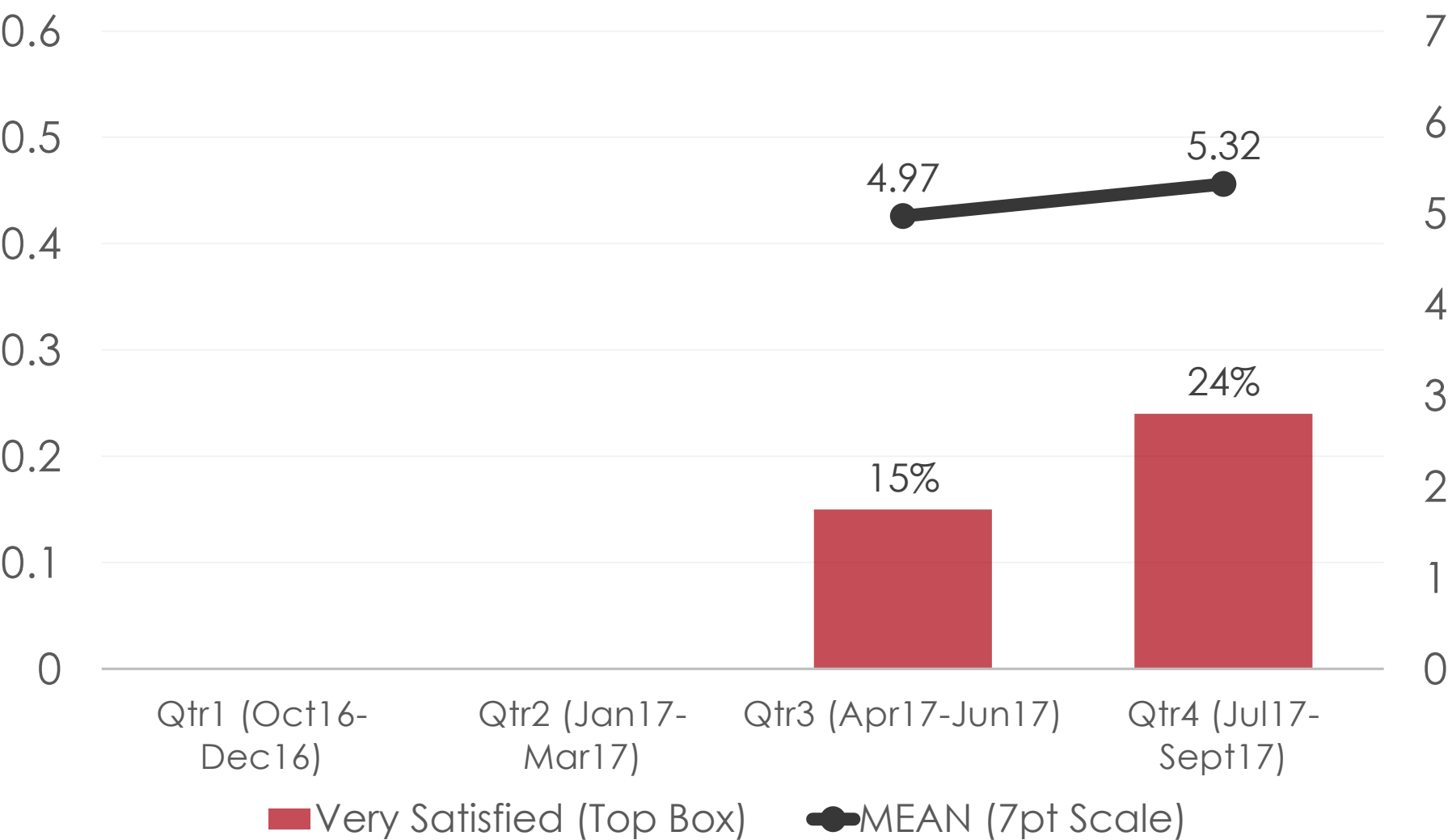
# GENERAL SATISFACTION



# GENERAL SATISFACTION – Quality/ Cleanliness

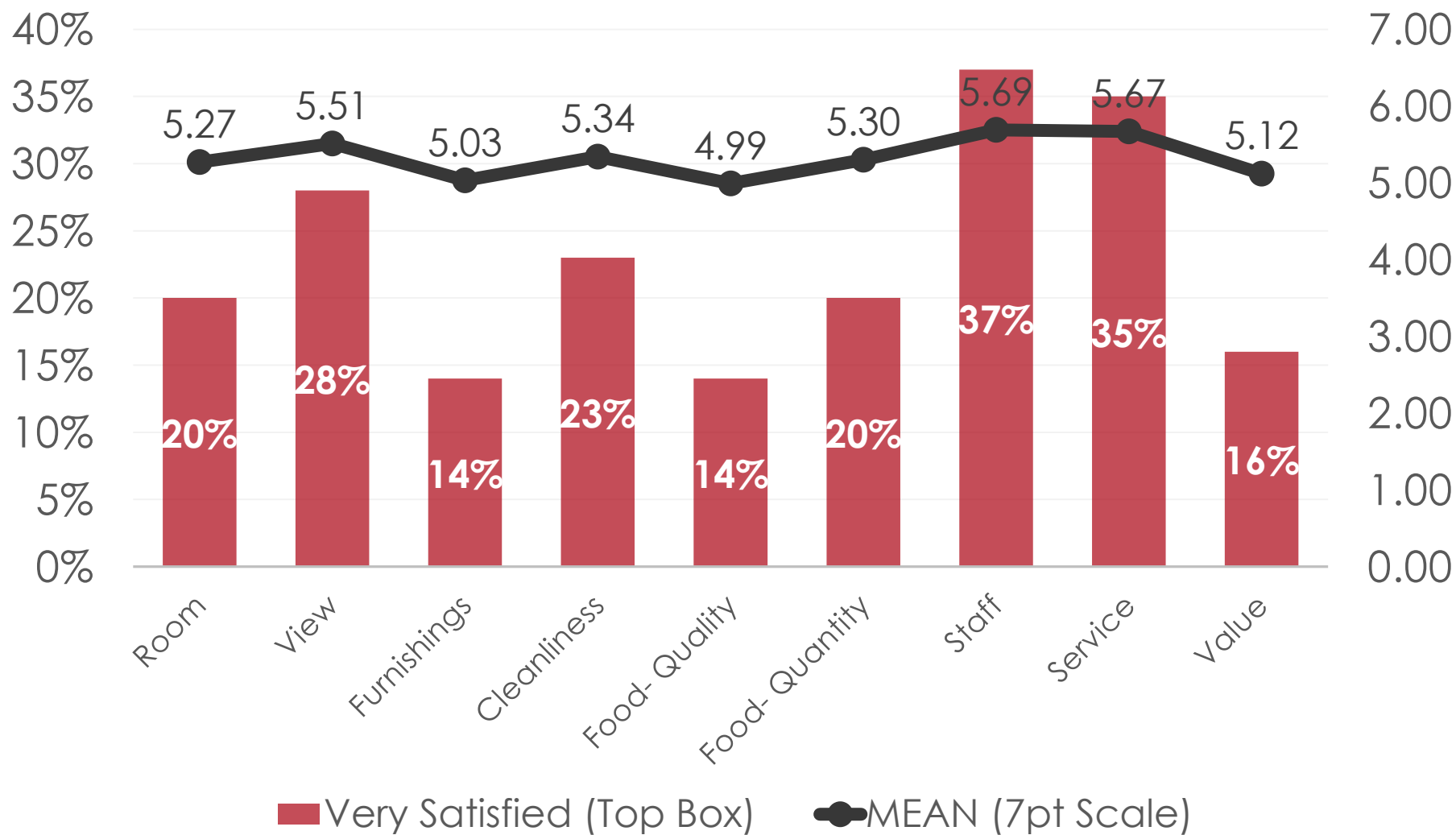


# ACCOMMODATIONS – OVERALL SATISFACTION

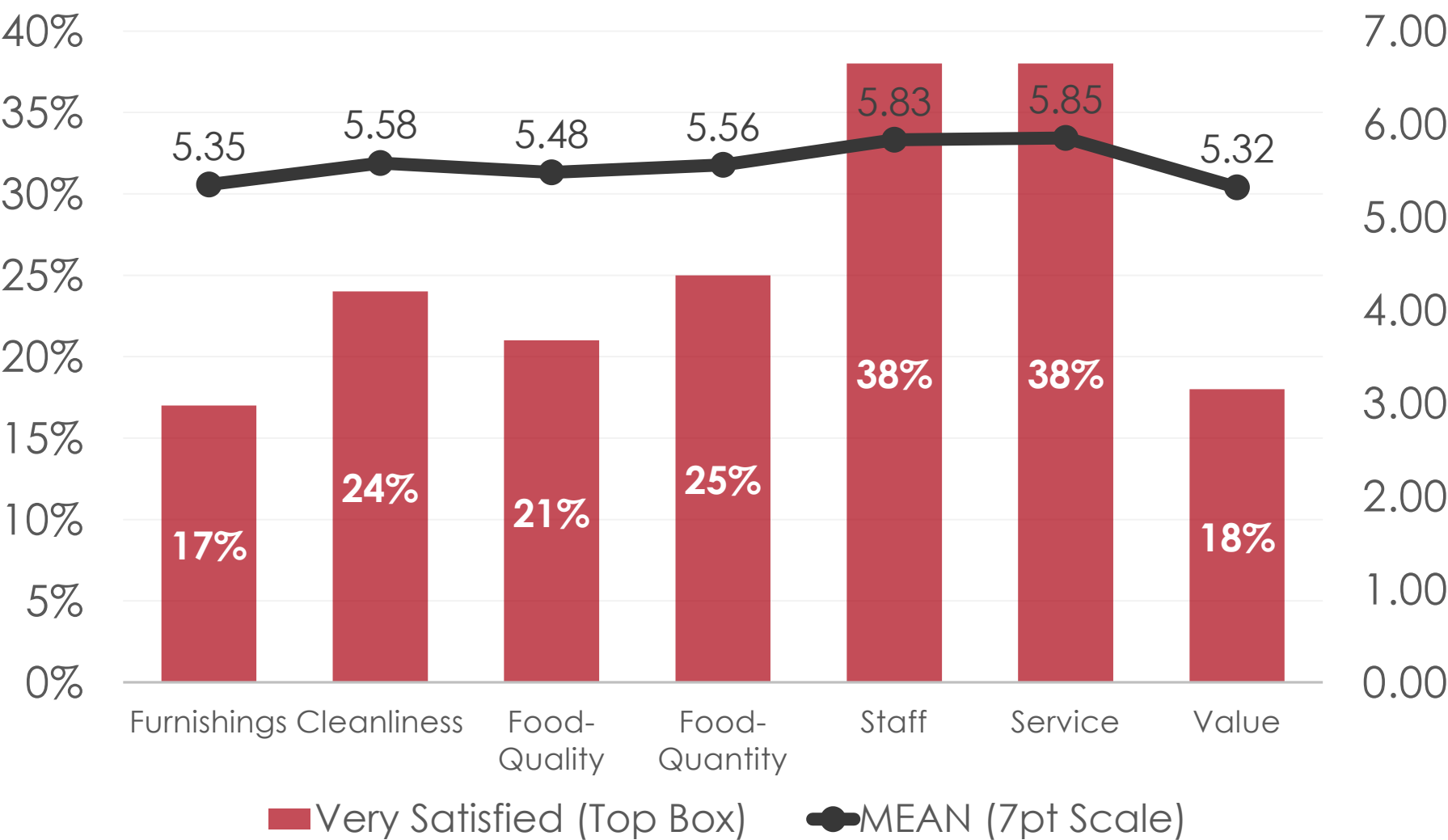


# ACCOMMODATIONS –

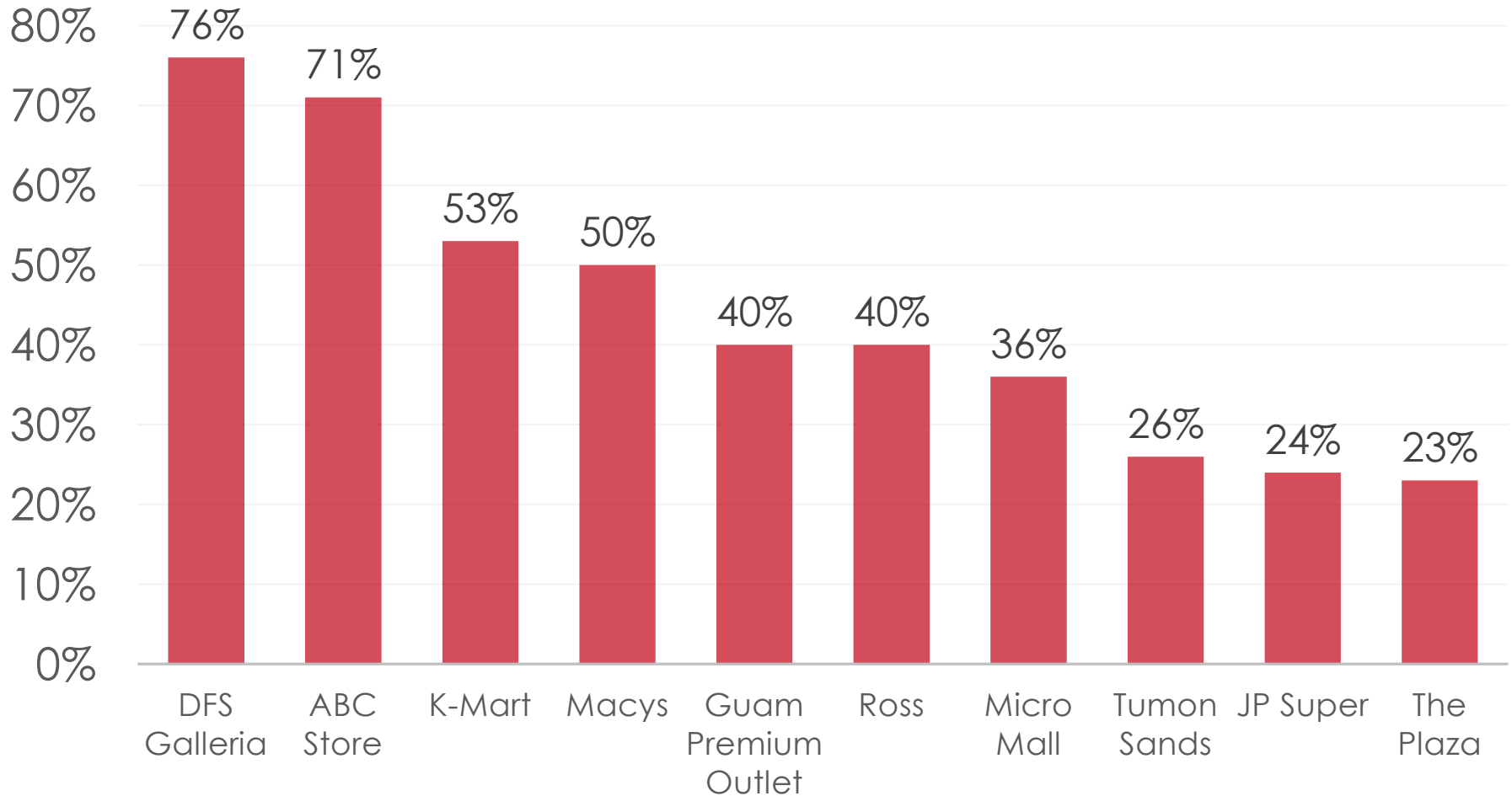
## Satisfaction by Category



# DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category

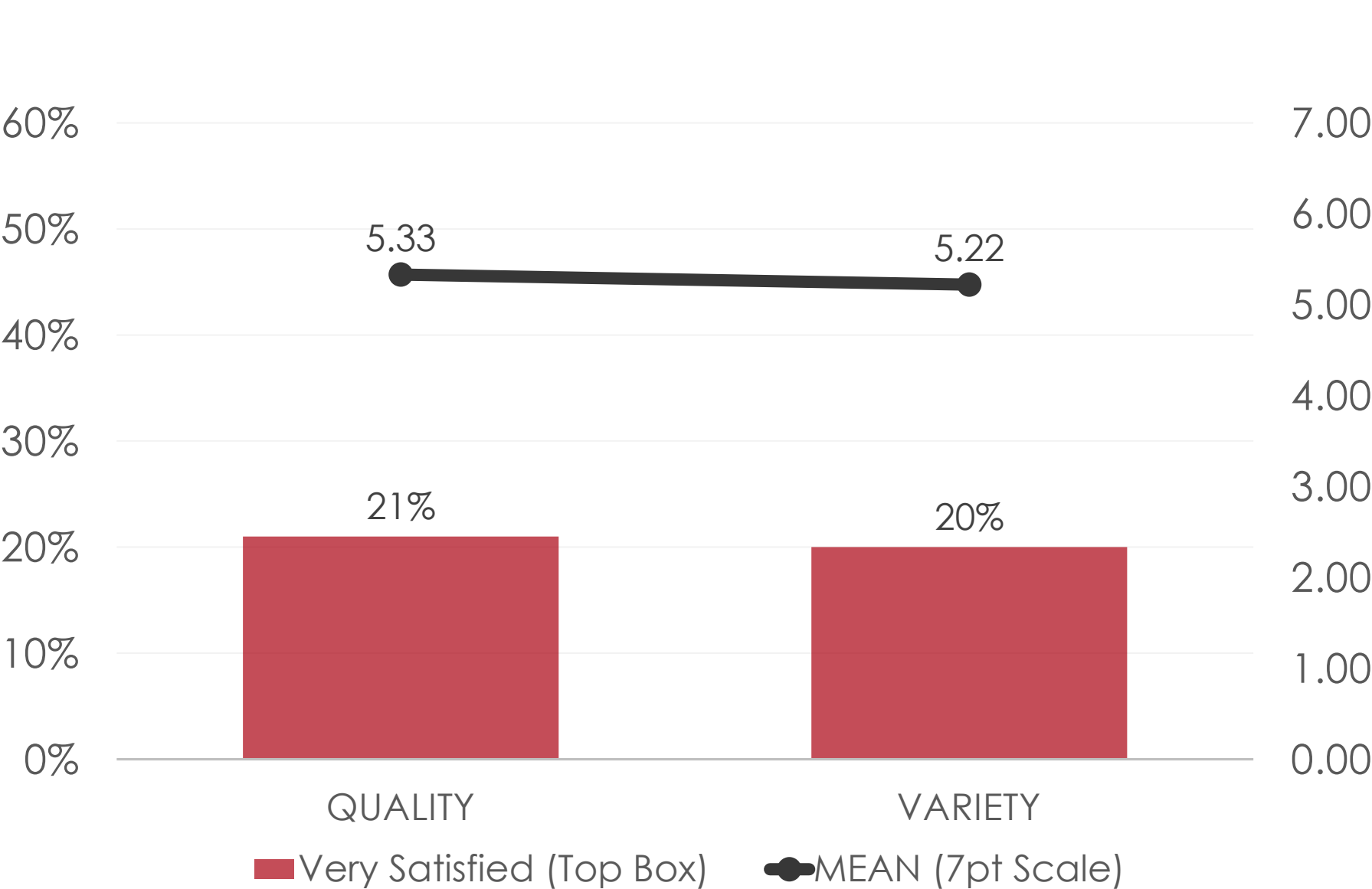


# Shopping Malls/ Stores (Top Responses)

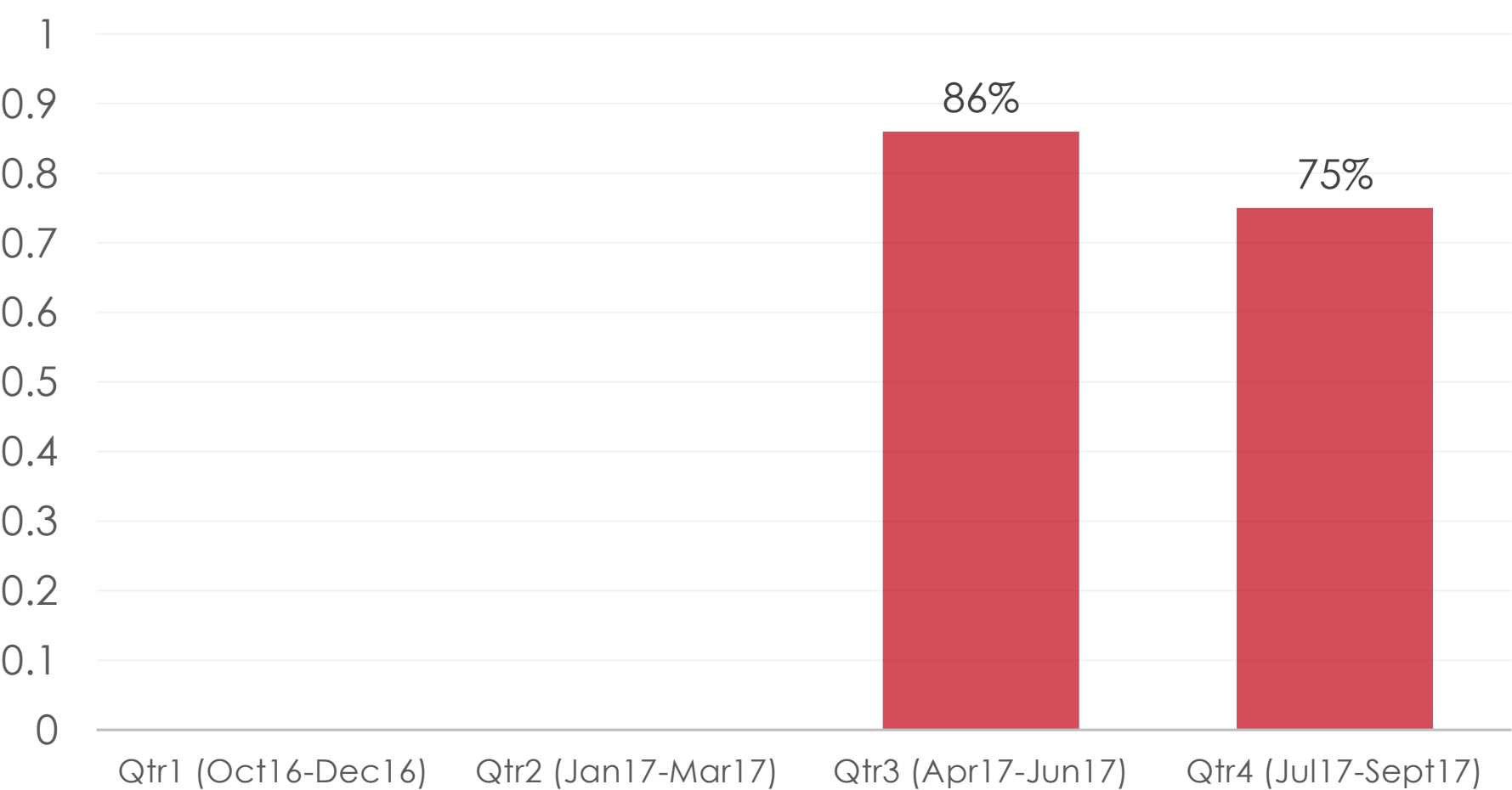




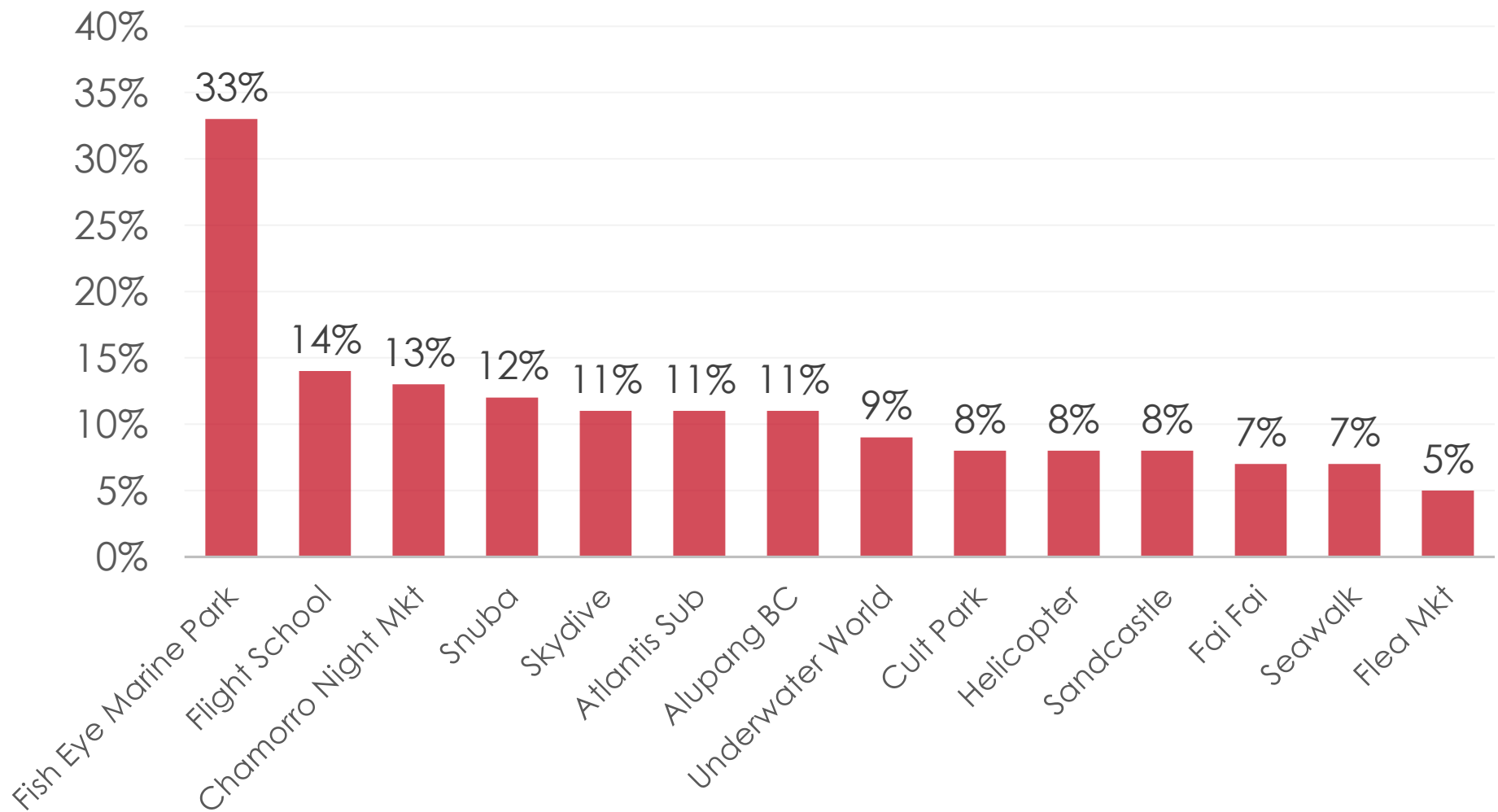
# SHOPPING - SATISFACTION



# OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

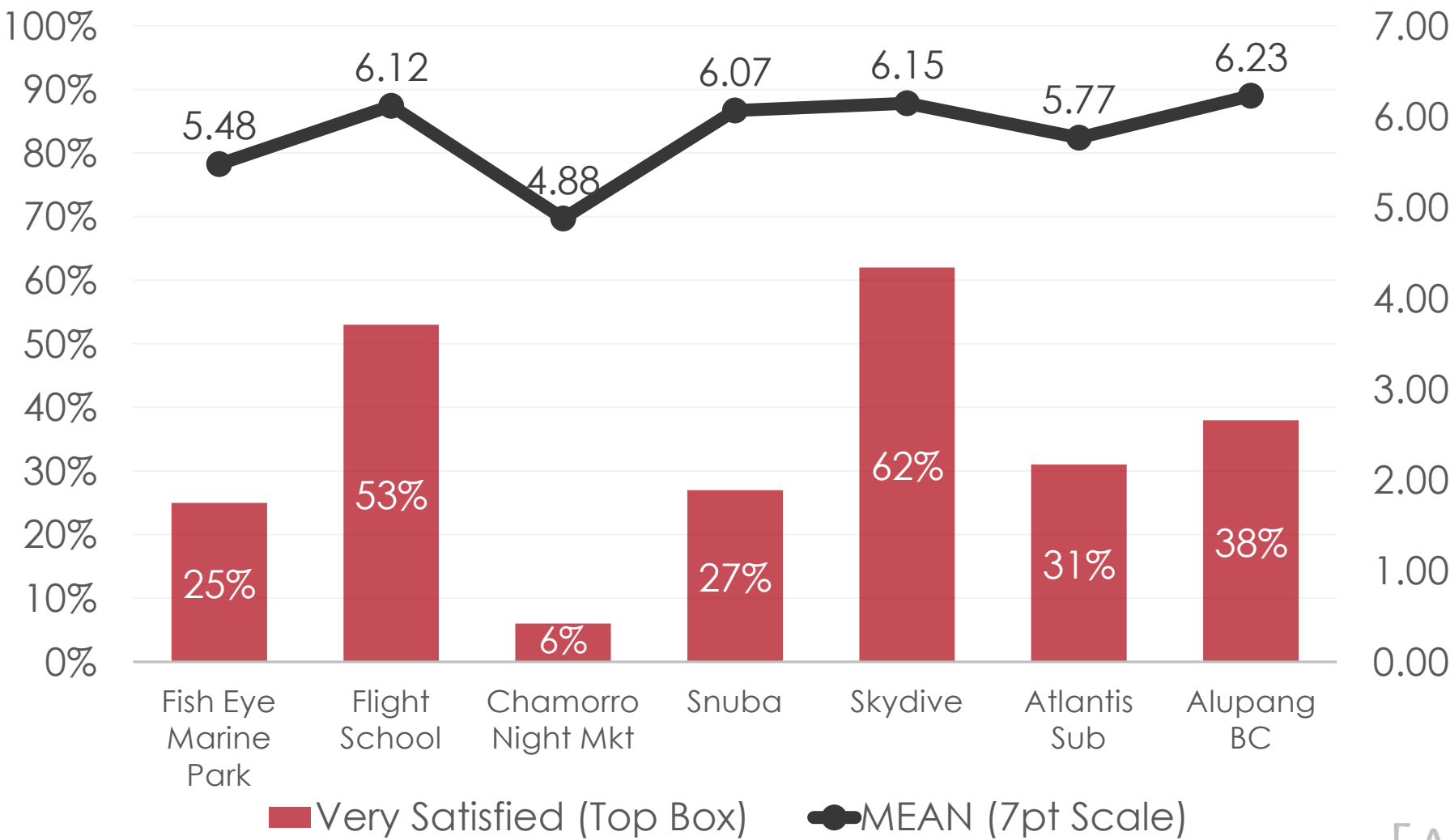


# Optional Tour Participation (Top Responses)

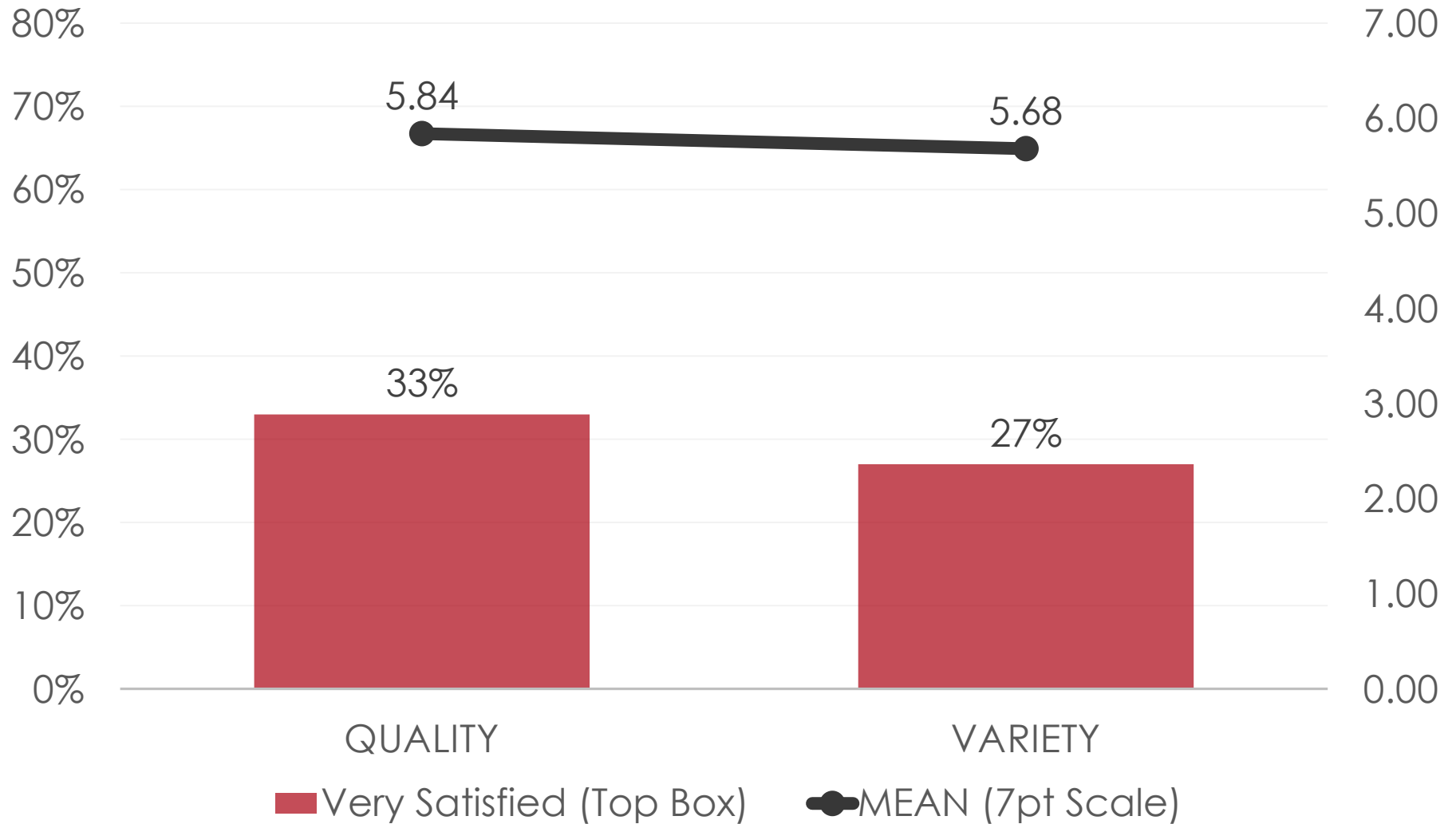


# Optional Tour Satisfaction

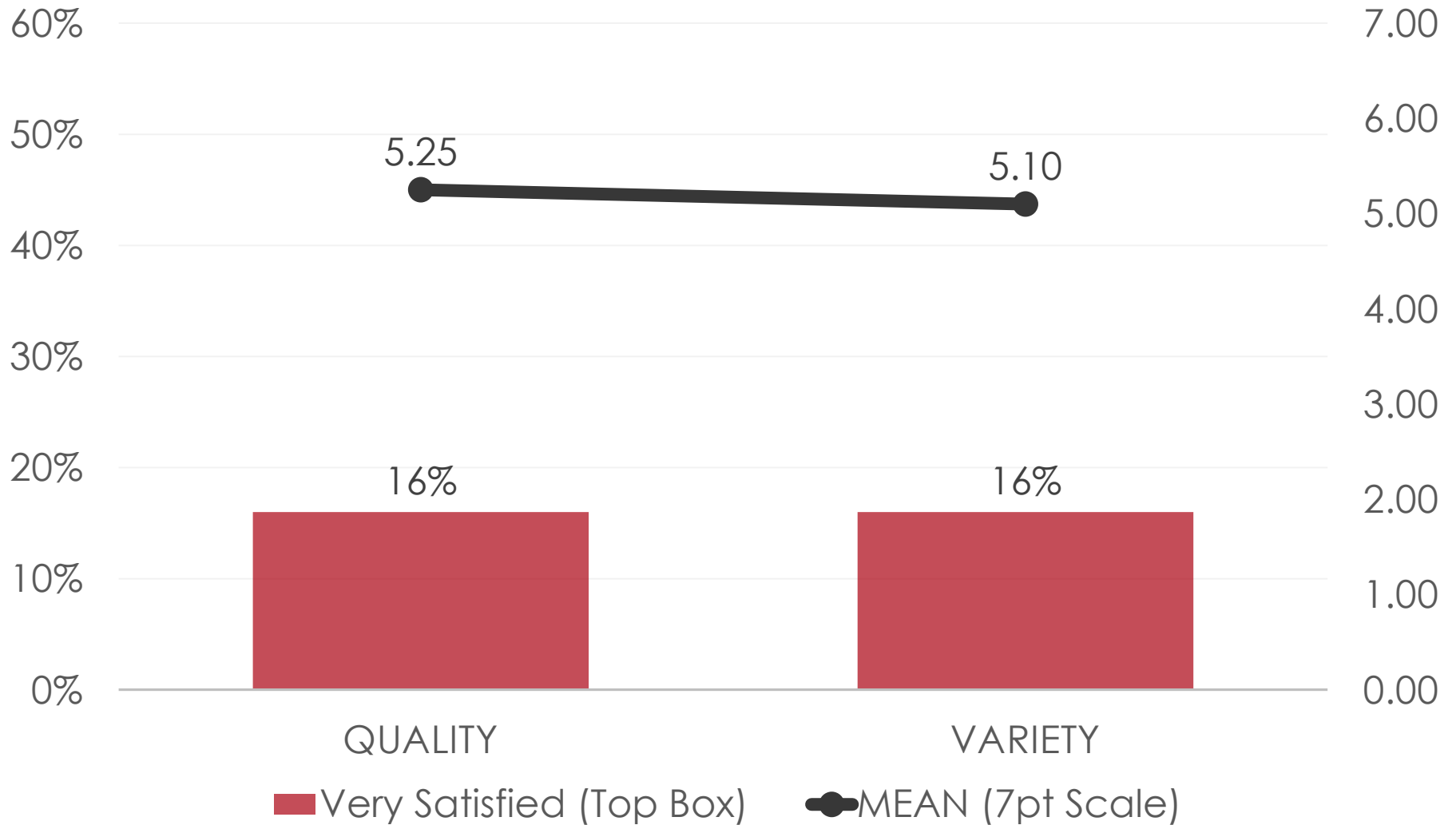
## Top Responses only - Participation (10%+)



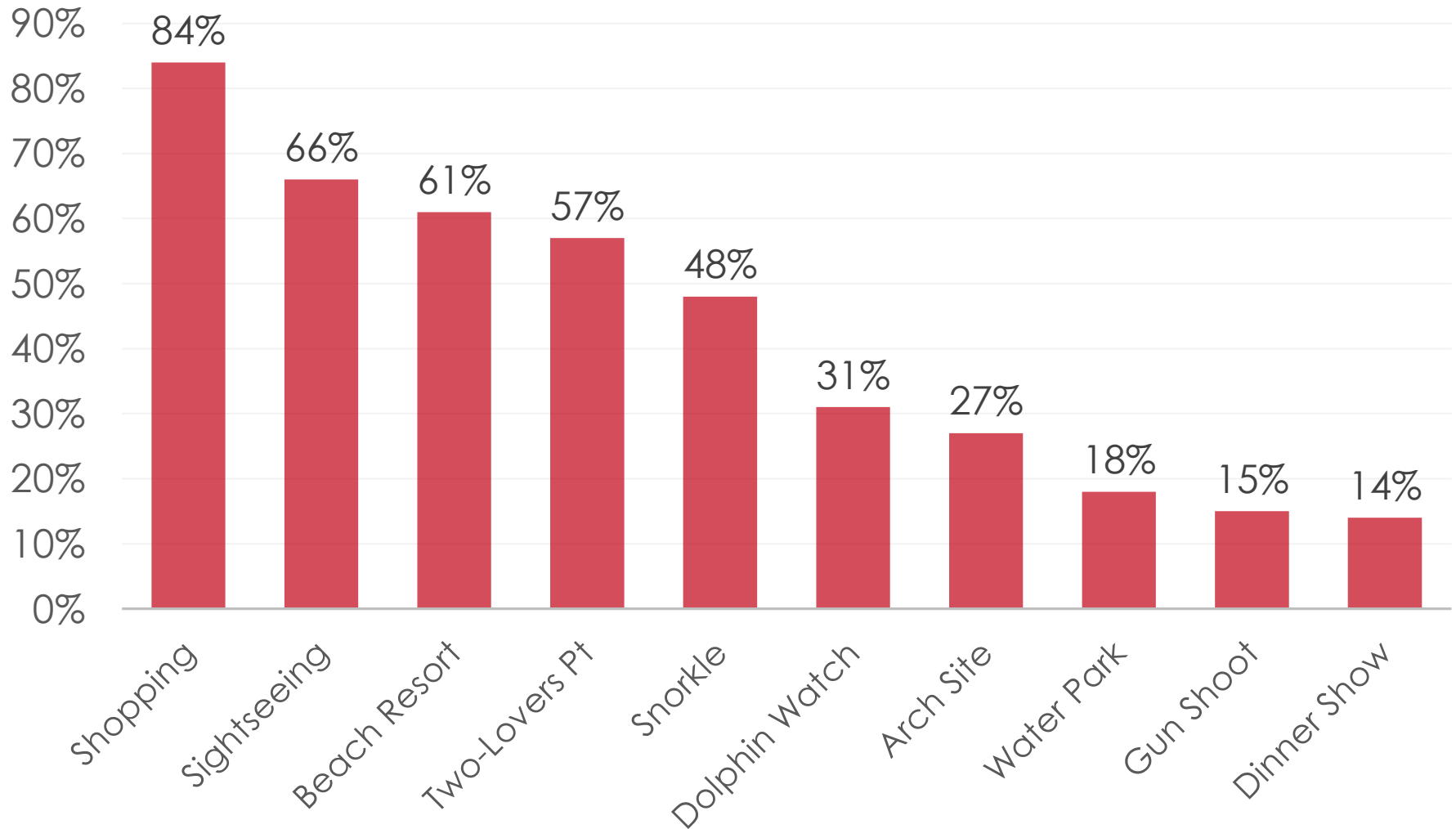
# DAY TOUR - SATISFACTION



# NIGHT TOUR - SATISFACTION



# Activities Participation (Top Responses)

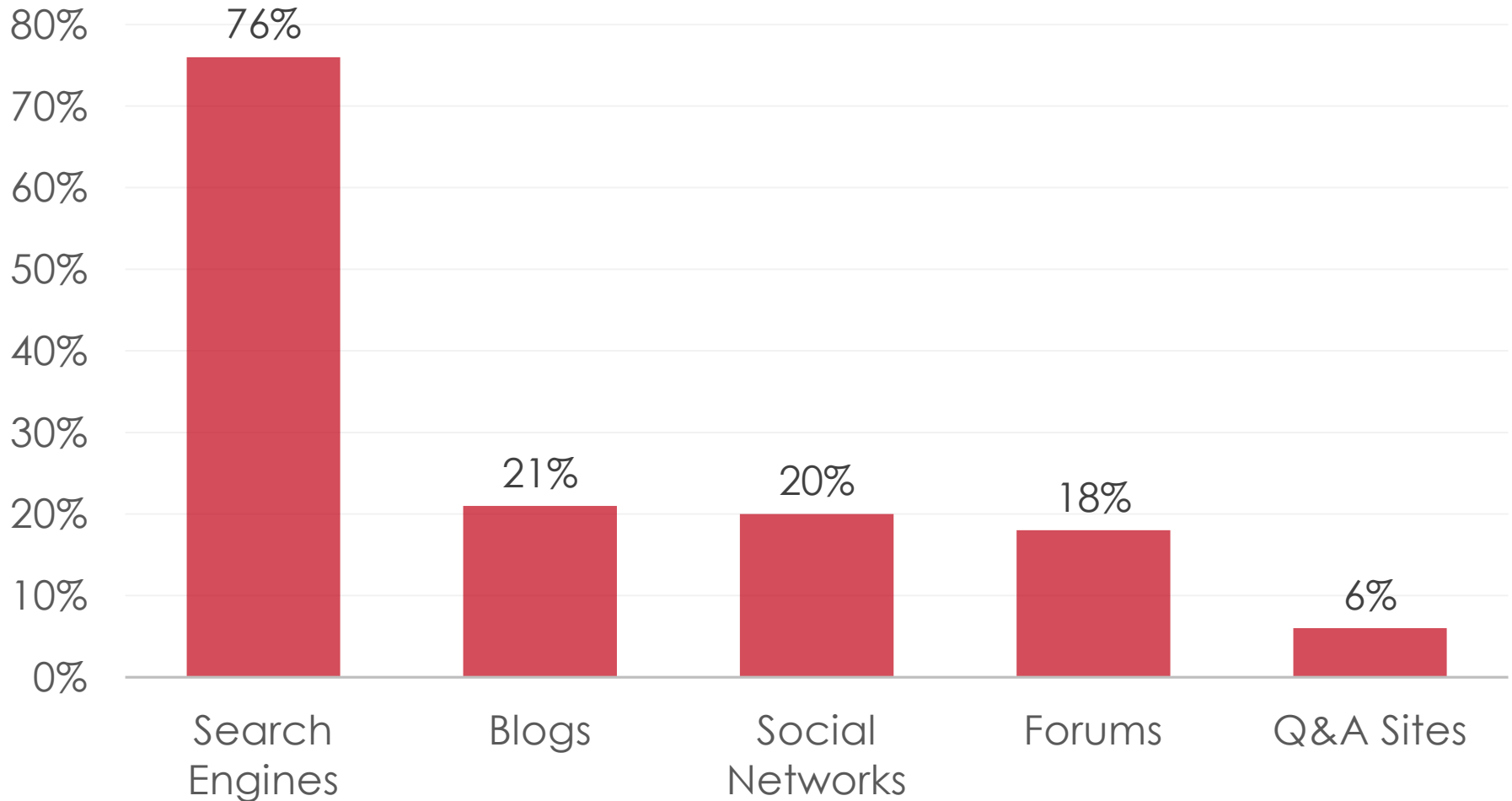


# SECTION 5

# PROMOTIONS

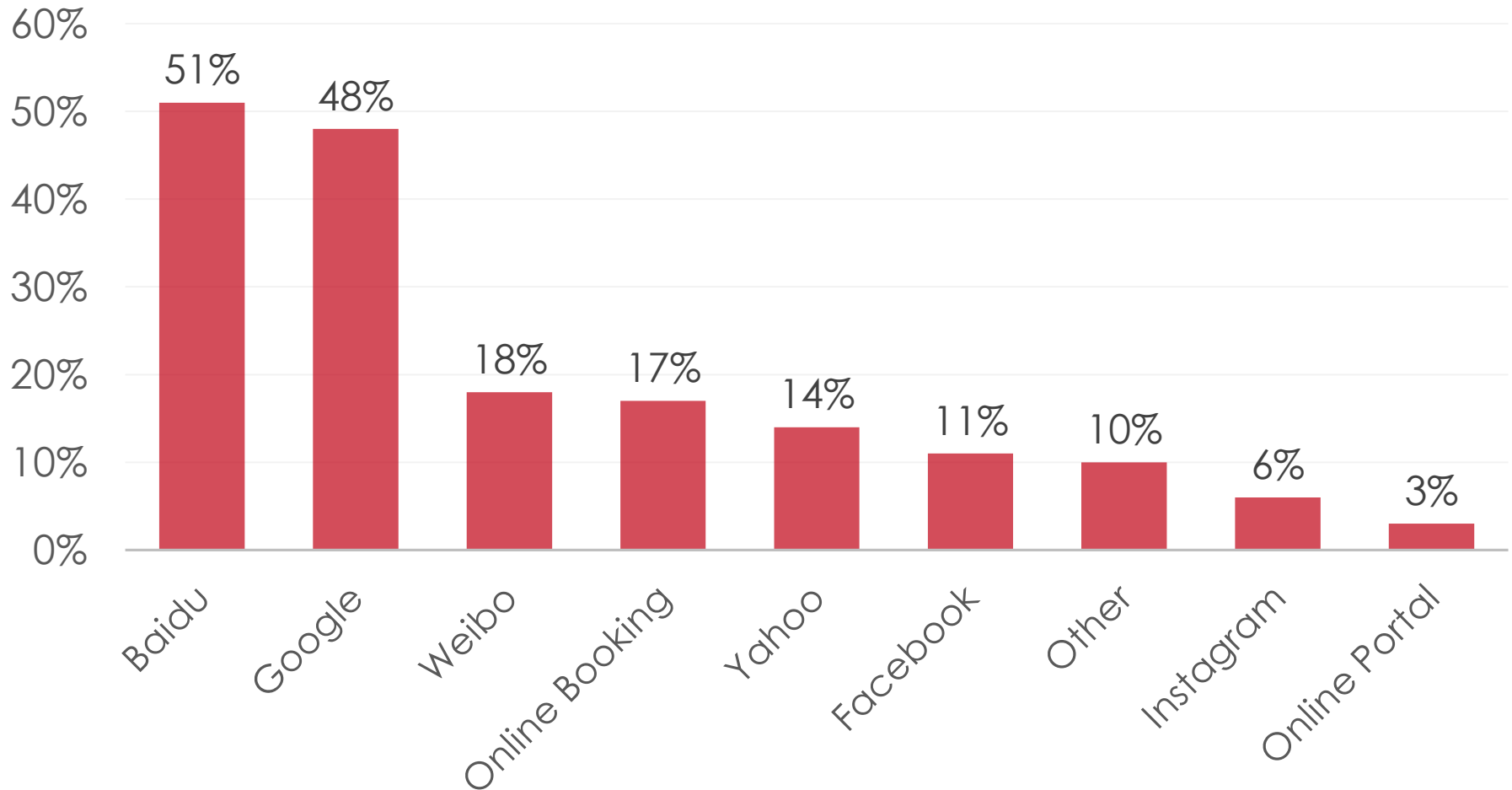


# INTERNET- GUAM SOURCES OF INFORMATION



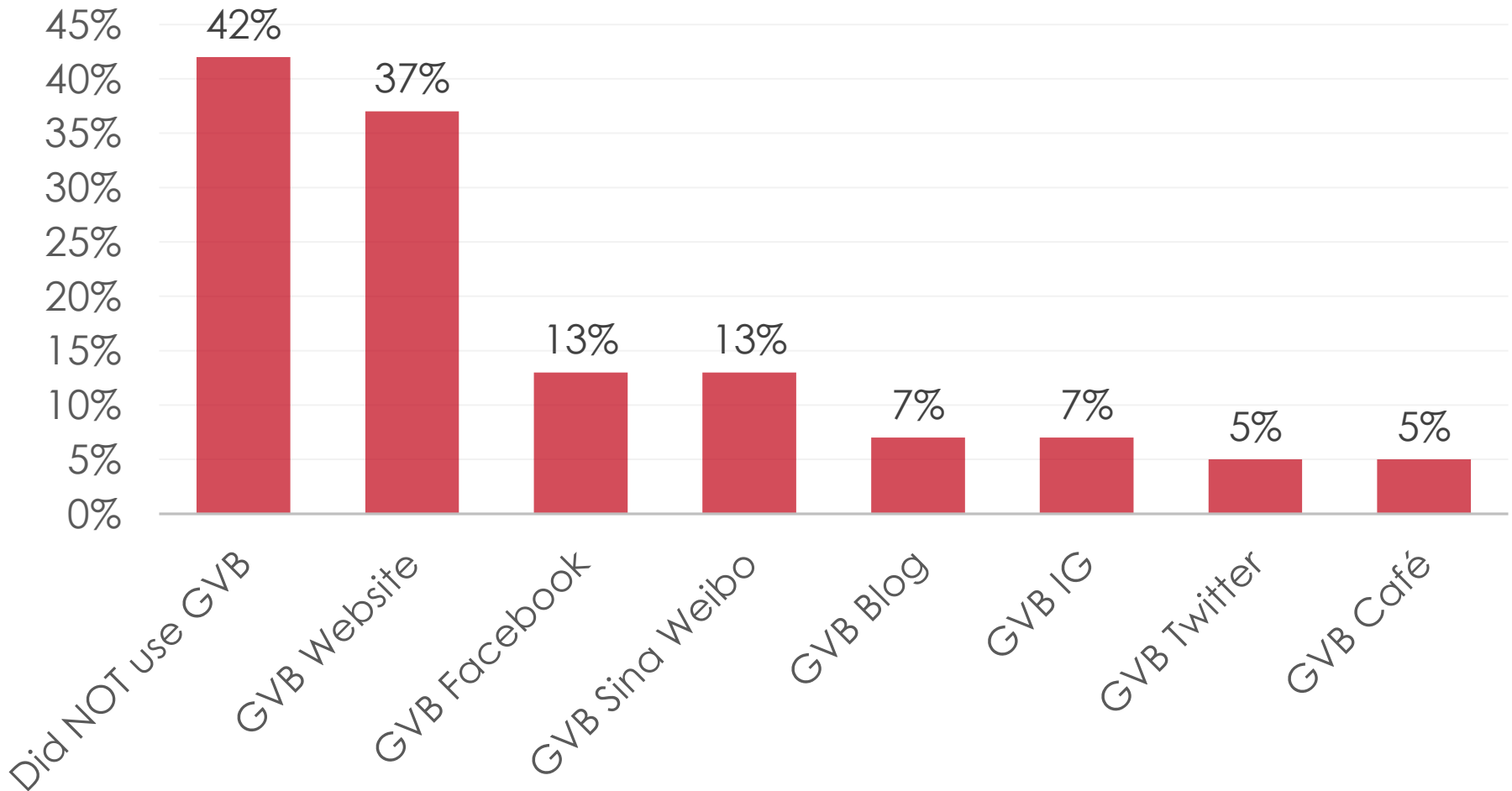
# INTERNET- SOURCES OF INFORMATION

## Things to do on Guam

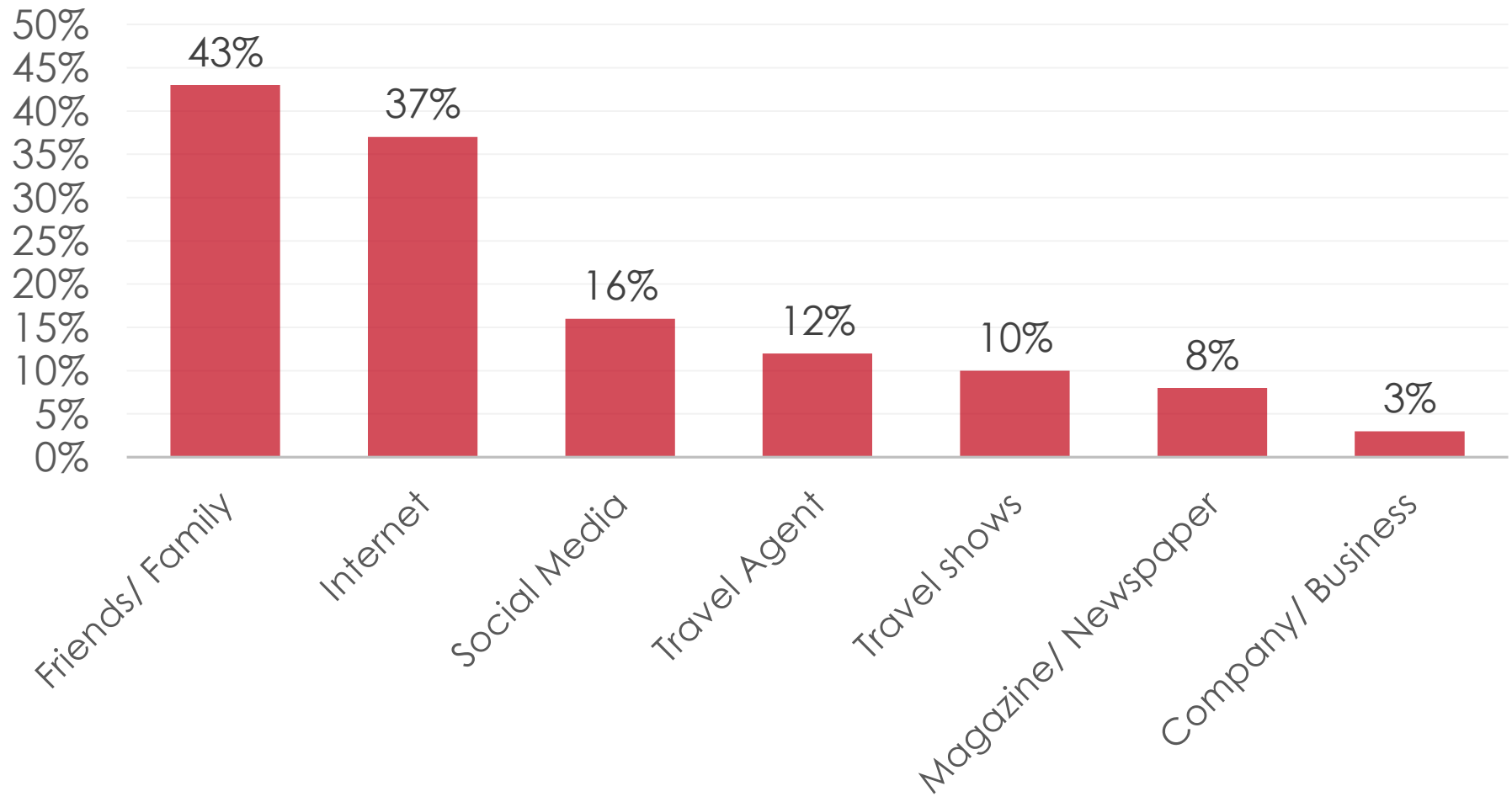


# INTERNET- SOURCES OF INFORMATION

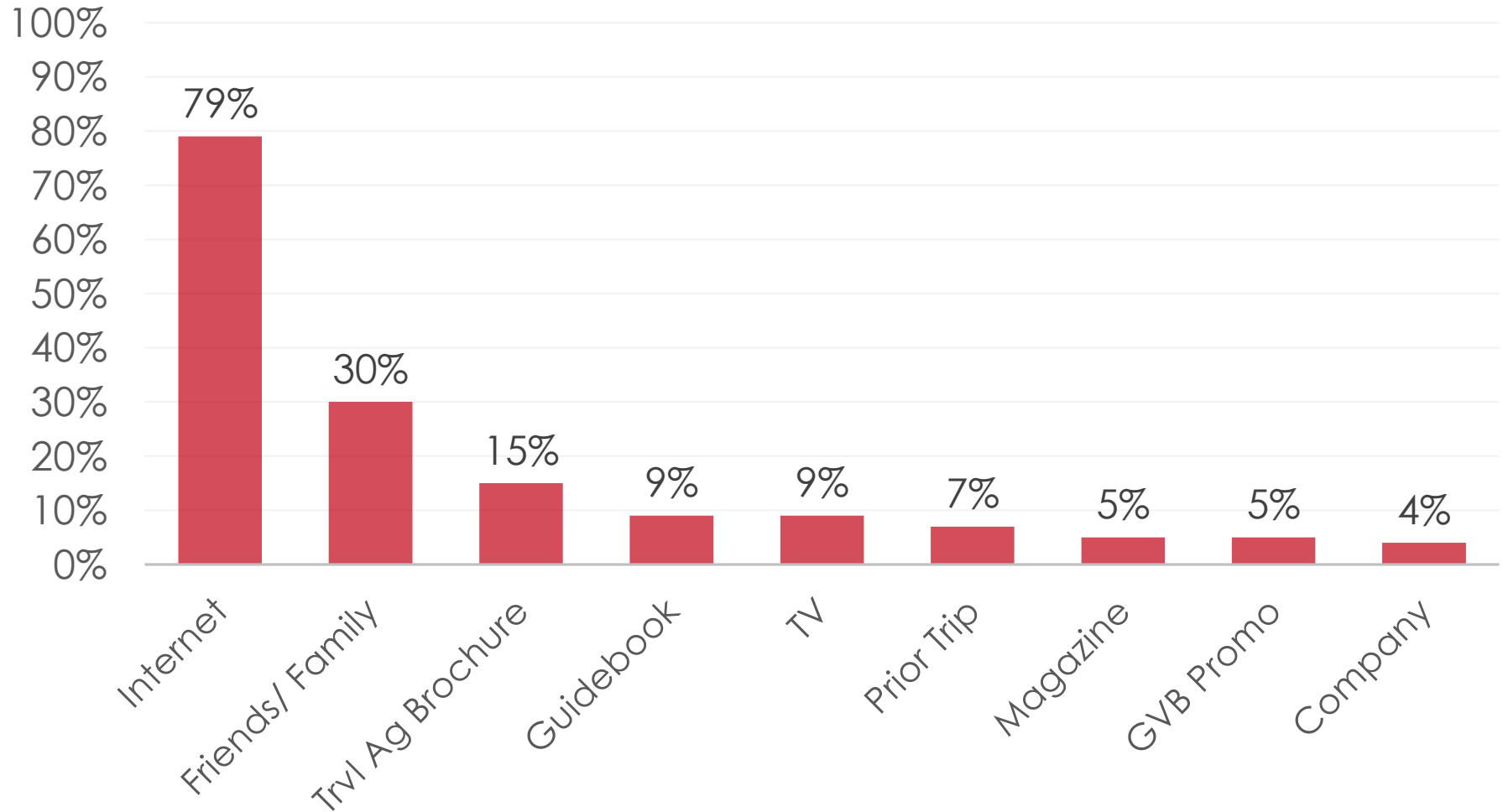
## GVB



# TRAVEL MOTIVATION



# PRE-ARRIVAL SOURCES OF INFORMATION



# PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

## GVB EXIT SURVEY

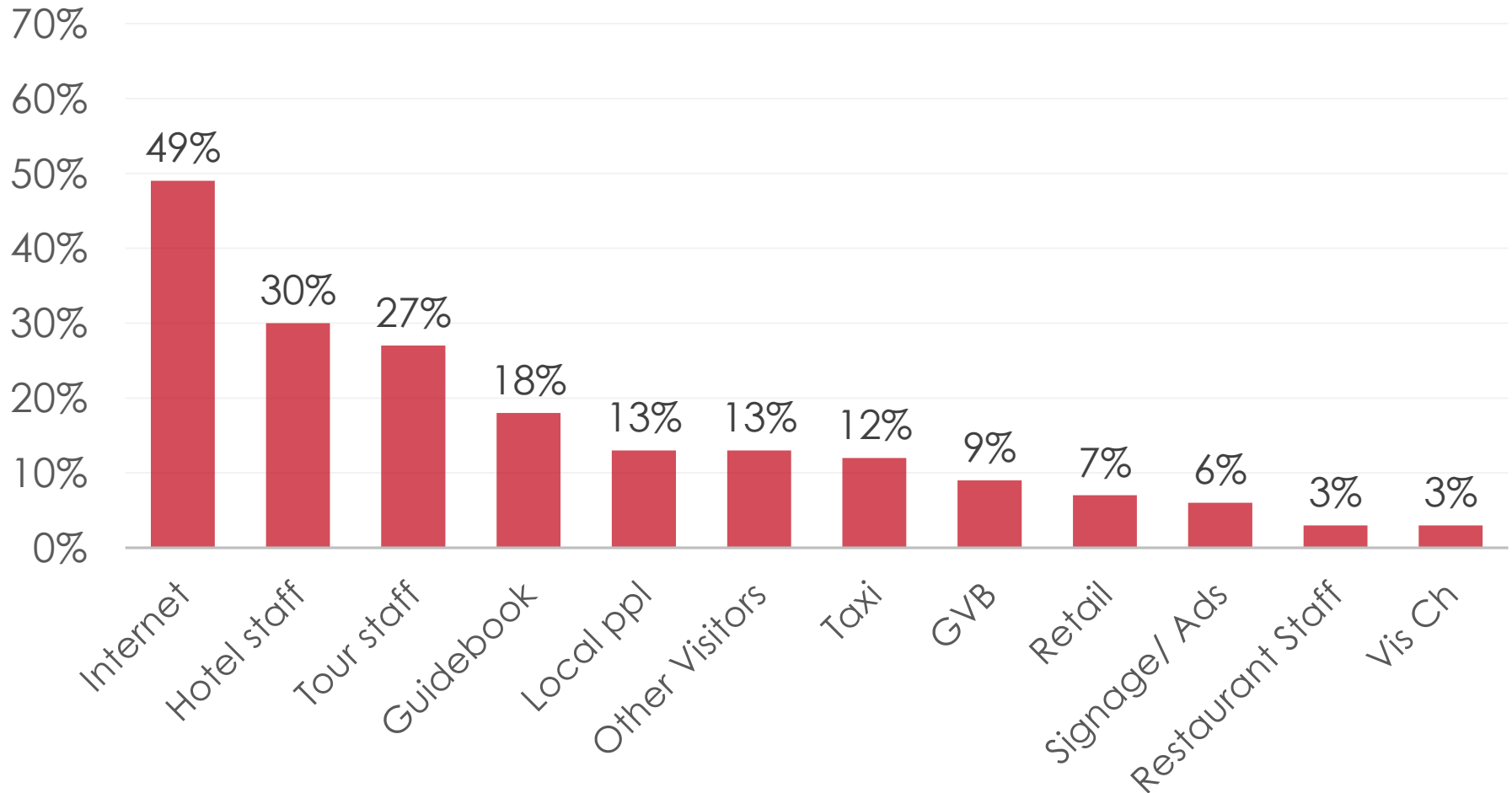
**Q1 Please select the top three sources of information you used to find out about Guam before your trip:**

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
Q1	Internet/Mobile App	79%	77%	78%	
	Friend or relative	30%	35%	29%	
	Travel agent brochure	15%	11%	19%	
	TV	9%	8%	9%	
	Travel guide book at bookstores	9%	7%	10%	
	I have been to Guam before	7%	8%	6%	
	Magazine (consumer)	5%	4%	6%	
	Guam Visitors Bureau promotional activities	5%	3%	6%	
	Co-worker/ company travel department	4%	7%	3%	
	Consumer travel shows	3%	3%	3%	
	Newspaper	2%	1%	1%	
	Travel trade shows	2%	1%	1%	
	Guam Visitors Bureau office	1%			
	Radio	1%		1%	
	Total	119	75	79	

Prepared by Anthology Research

# ONISLE

## SOURCES OF INFORMATION



# ON-ISLE SOURCES OF INFORMATION – Key Segments

## GVB EXIT SURVEY

**Q2 Please select the top three sources of information you used to find out about Guam while you were here:**

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
Q2	Internet/Mobile App	49%	54%	49%	
	Hotel staff	30%	32%	25%	
	Tour staff	27%	19%	33%	
	Guide books I brought with me	18%	16%	20%	
	Local people	13%	14%	9%	
	Other visitors	13%	15%	15%	
	Taxi drivers	12%	12%	9%	
	Guam Visitors Bureau	9%	4%	14%	
	Retail staff	7%	5%	6%	
	Signs/ advertisement	6%	5%	6%	
	Visitors channel	3%	5%	5%	
	Restaurant staff (outside hotel)	3%	3%	3%	
	Local publication	1%	1%		
	Total	119	74	79	

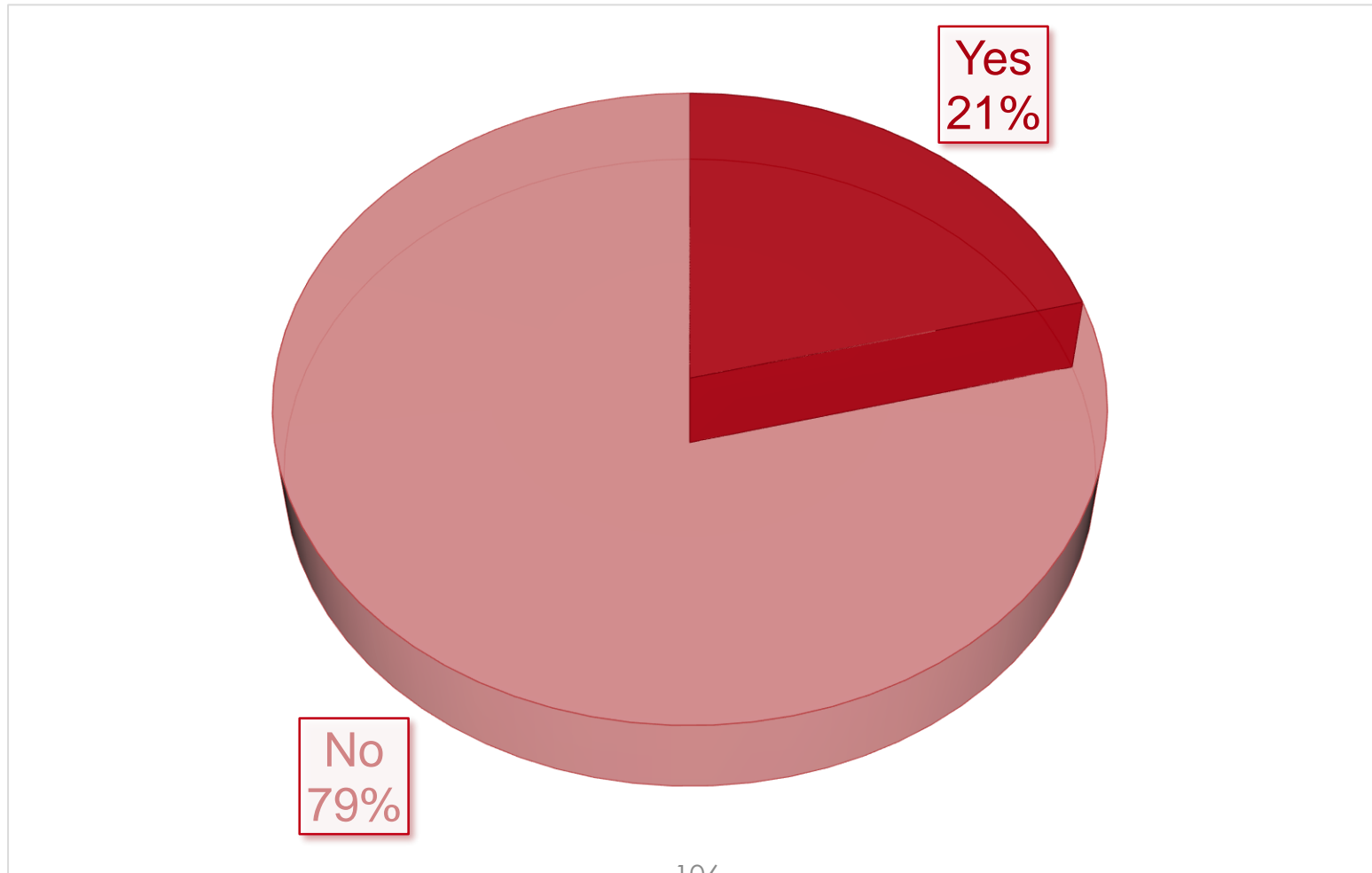
Prepared by Anthology Research



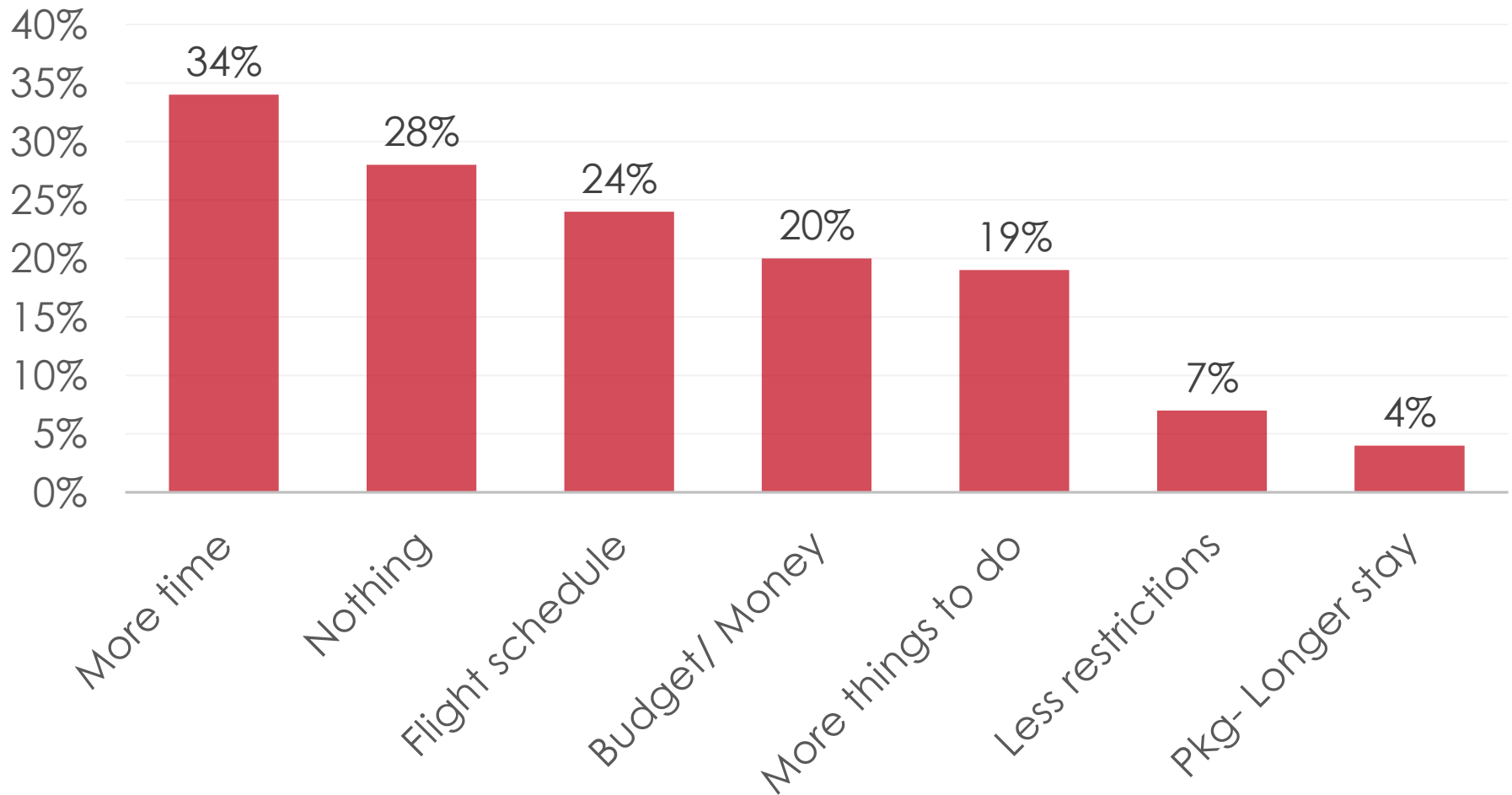
# SECTION 6

## FUTURE TRAVEL TO GUAM

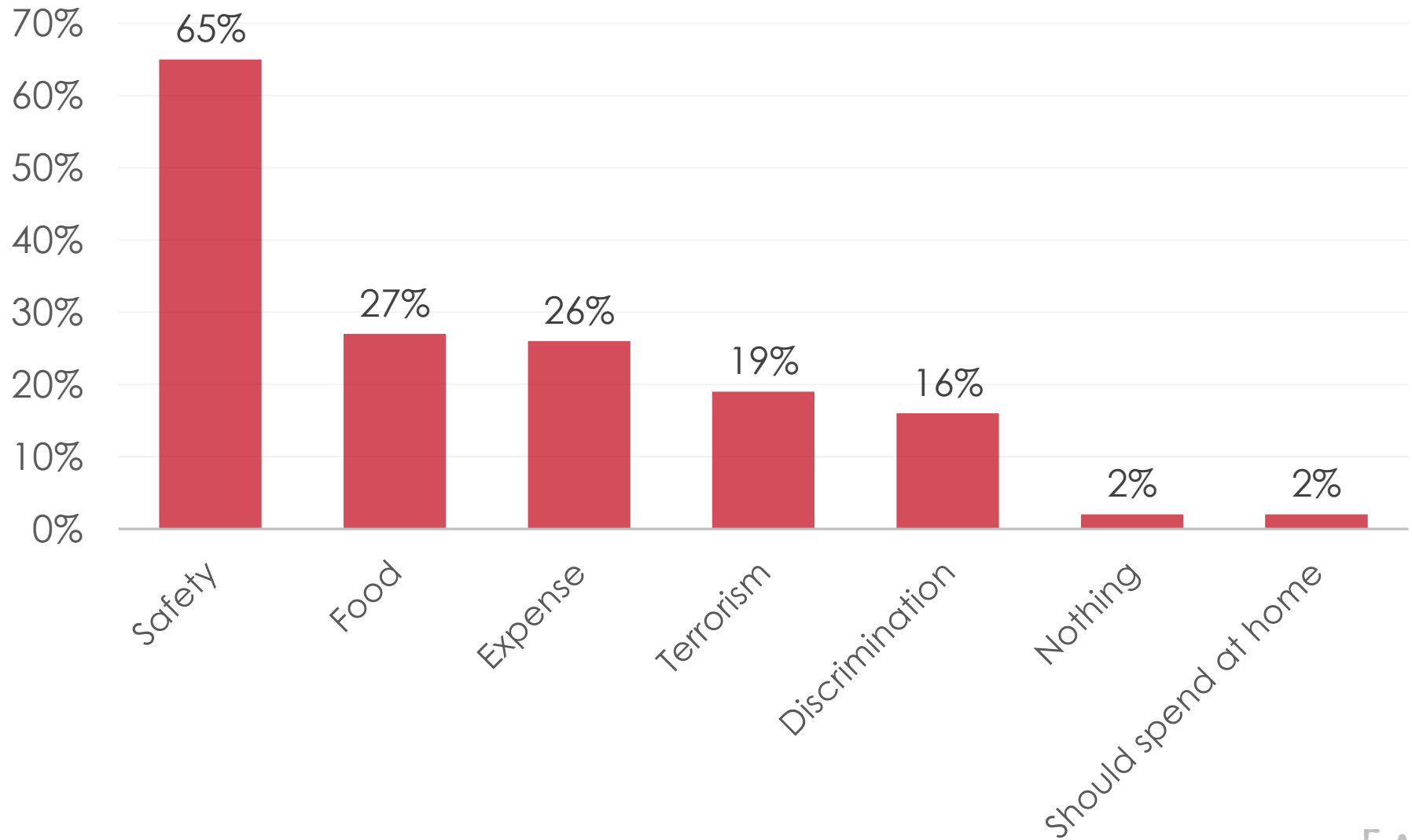
# Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



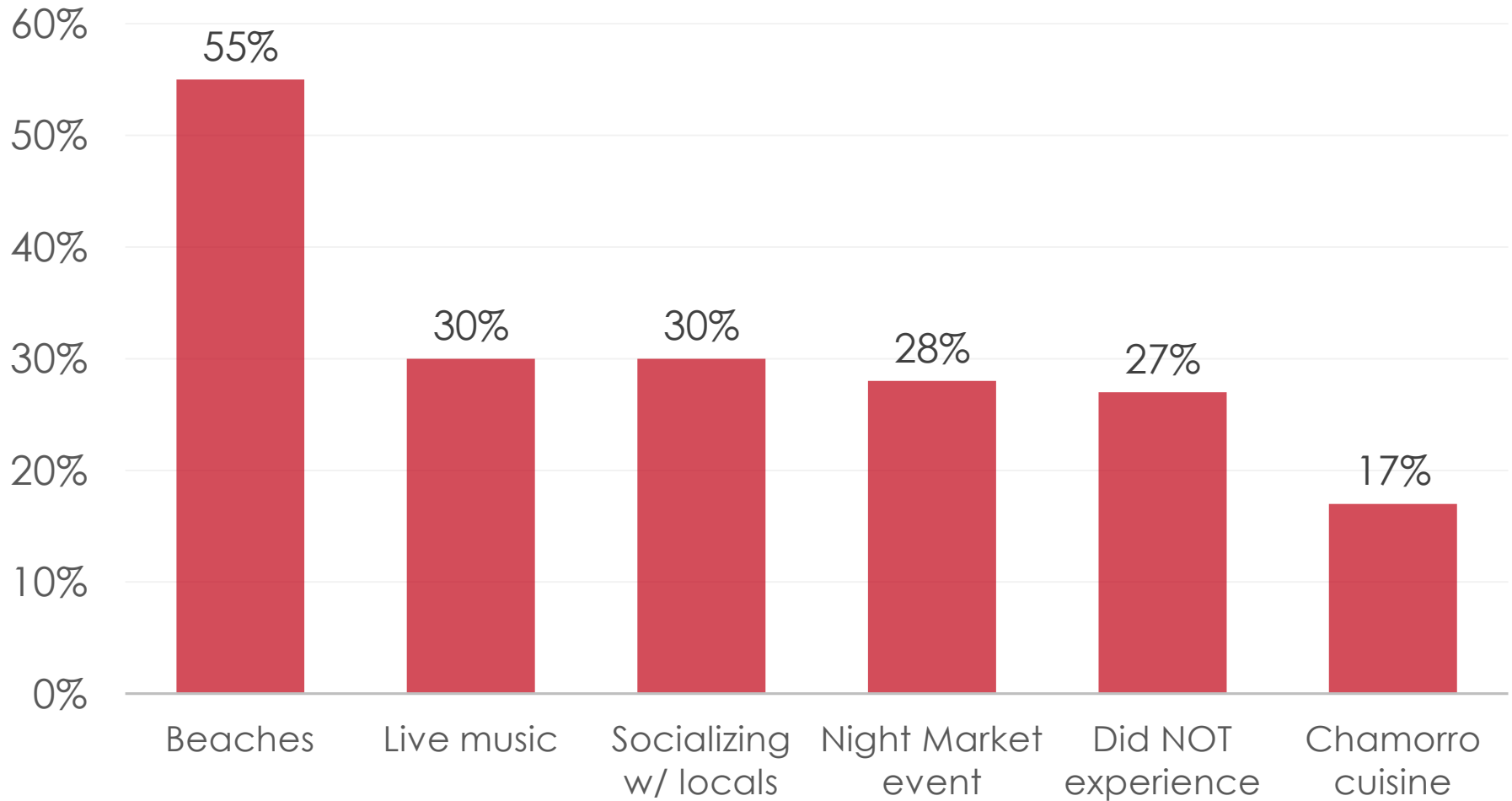
# FUTURE TRAVEL CONCERNS



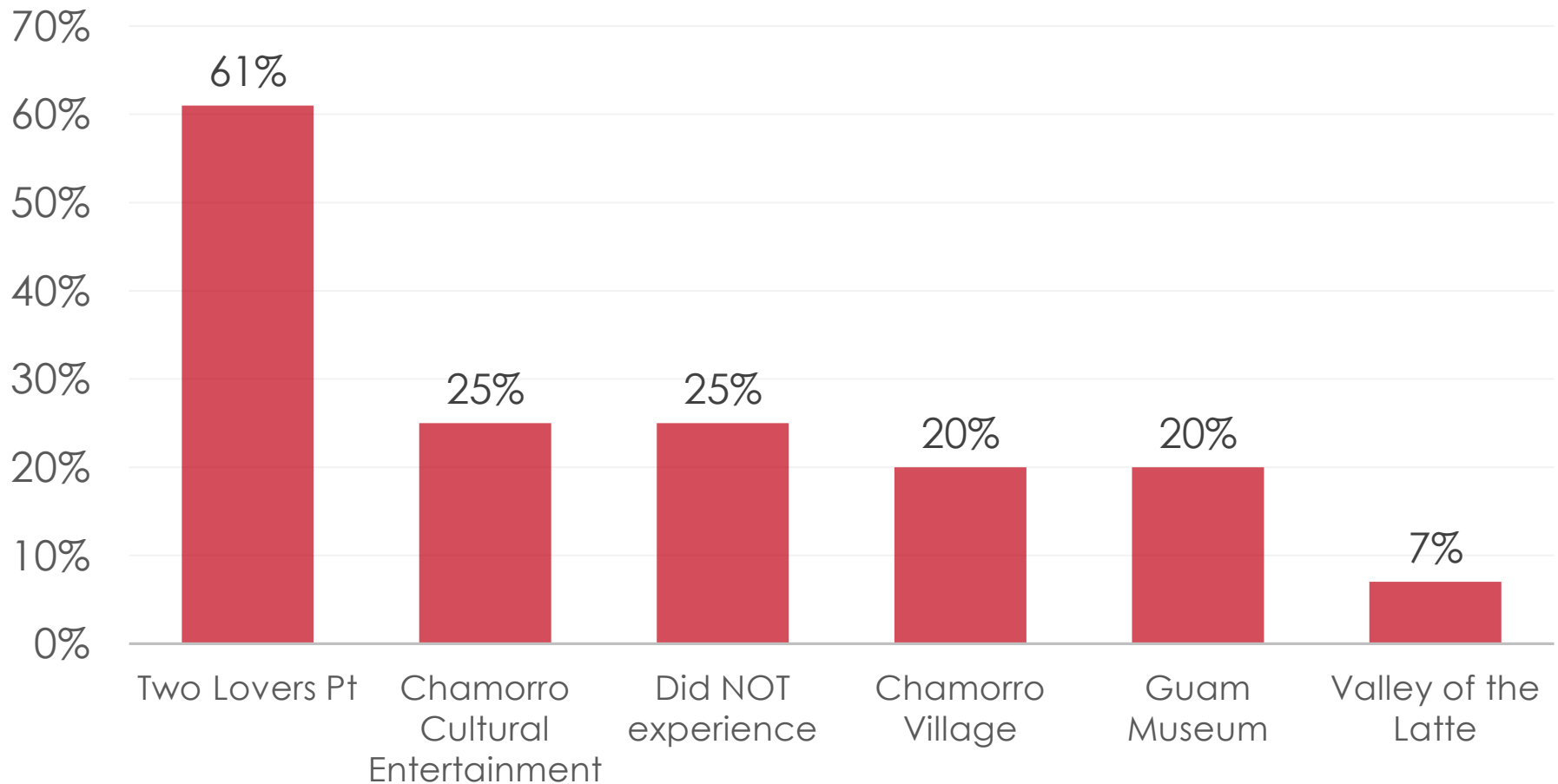
# SECTION 7

## GUAM CULTURE

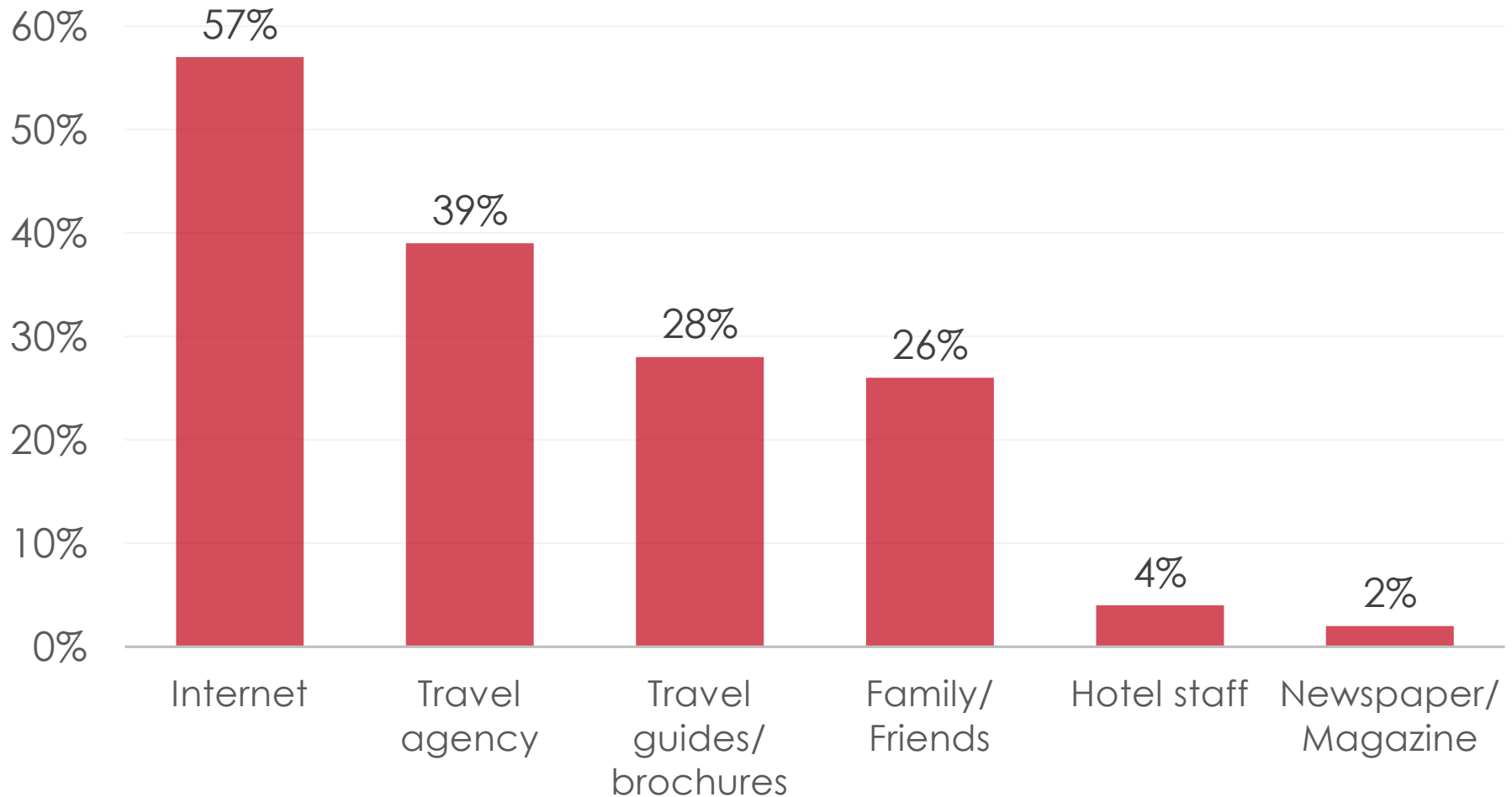
# EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT



# EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS

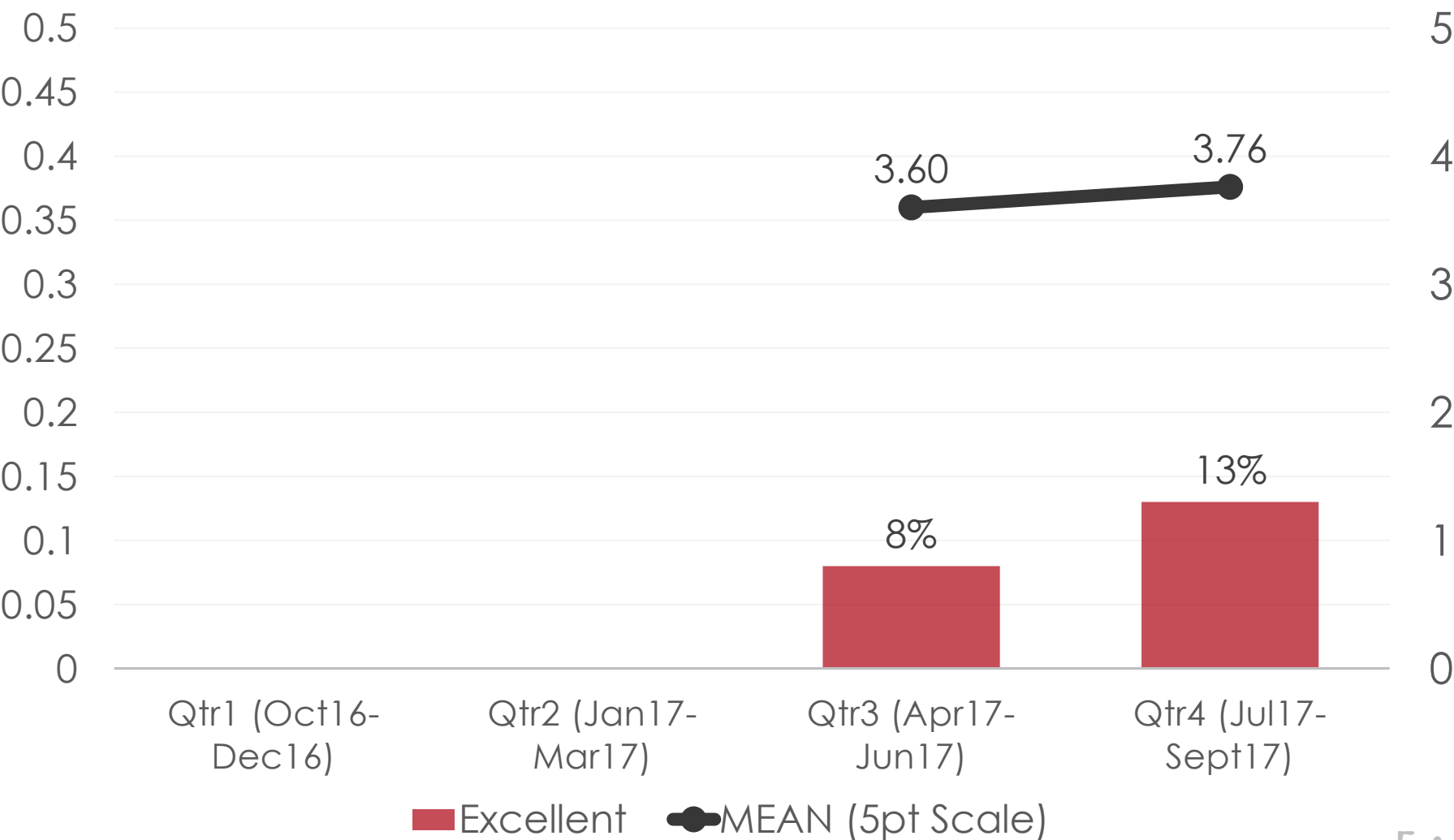


# SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS

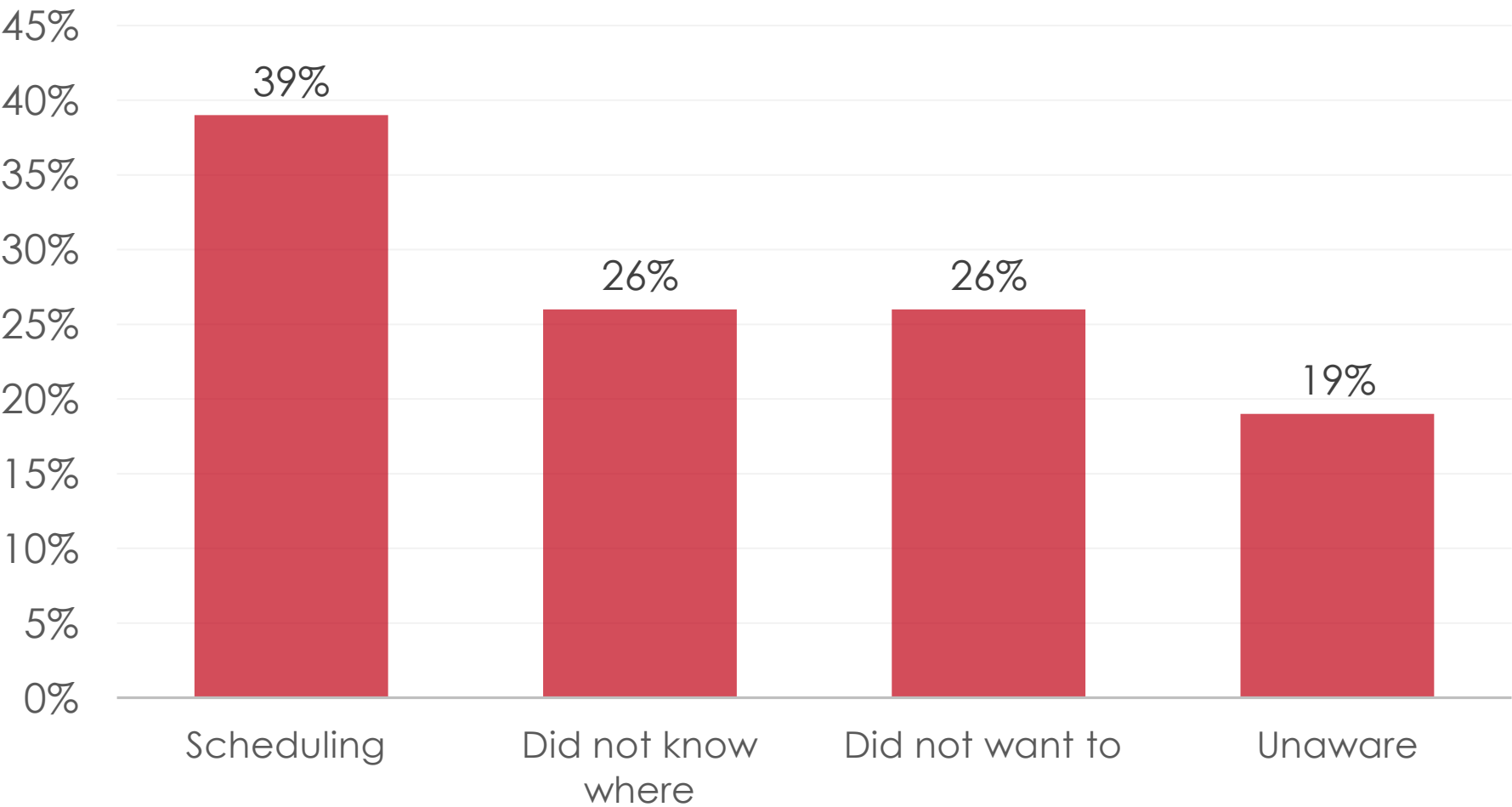




# SATISFACTION- CULTURAL ACTIVITY/EVENTS



# 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- Overall Satisfaction

Comparison of Drivers of Overall Satisfaction, 3rd, 4th Qtr. and Overall 3-4 Qtr. 2017			
Drivers:	2nd Qtr rank	3rd Qtr. rank	Combined 3-4 Qtr. 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	1		
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping	3		3
Variety of shopping			
Price of things on Guam			
Quality of hotel accommodations			
Quality/cleanliness of air, sky			
Quality/cleanliness of parks	2		
Quality of landscape in Tumon			
Quality of landscape in Guam			
Quality of ground handler		1	2
Quality/cleanliness of transportation vehicles			
% of Per Person On Island Expenditures Accounted For	51.6%	38.3%	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 one significant factor in the 4th Quarter 2017 Period. It is:
  - **Quality of ground handler.**
- With this factor the overall  $r^2$  is .383 meaning that **38.3% of overall satisfaction is accounted for by this factor.**

# Drivers – On-Isle Expenditures

Comparison of Drivers of Per Person On Island Expenditure, 3rd, 4th Qtr. and Overall 3-4 Qtr. 2017			
Drivers:	3rs Qtr rank	4th Qtr. <b>rank</b>	Combined 3-4 Qtr. 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%	<b>0.0%</b>	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 4th Quarter 2017 period