

Guam Visitors Bureau

Hong Kong Visitor Tracker Exit Profile

FY2018 DATA AGGREGATION

Prepared by: Anthology Research

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#instaGuam



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 **424** 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 **424** is +/- 4.76 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 +/- 4.76 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.

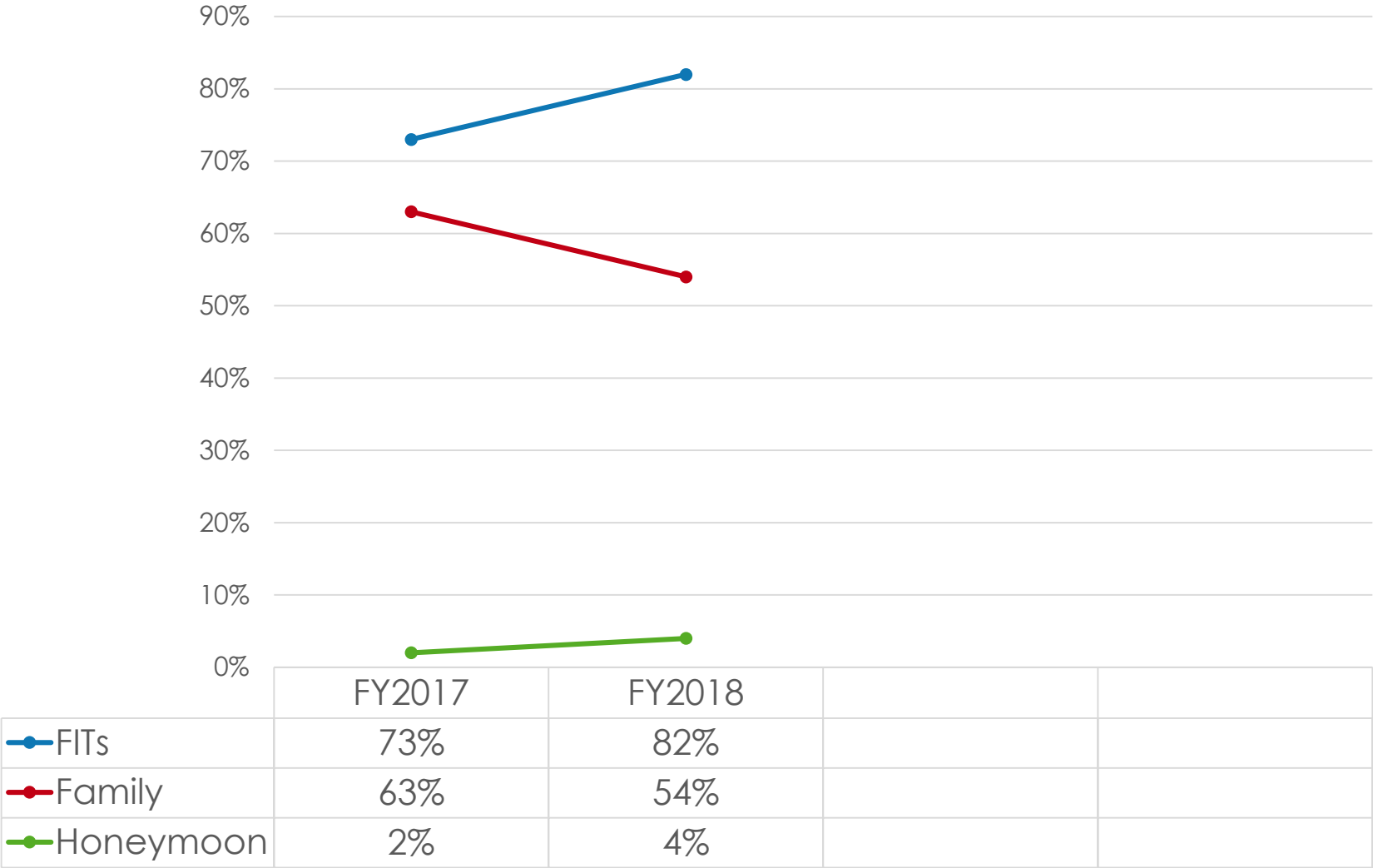
SECTION 1

PROFILE OF RESPONDENTS

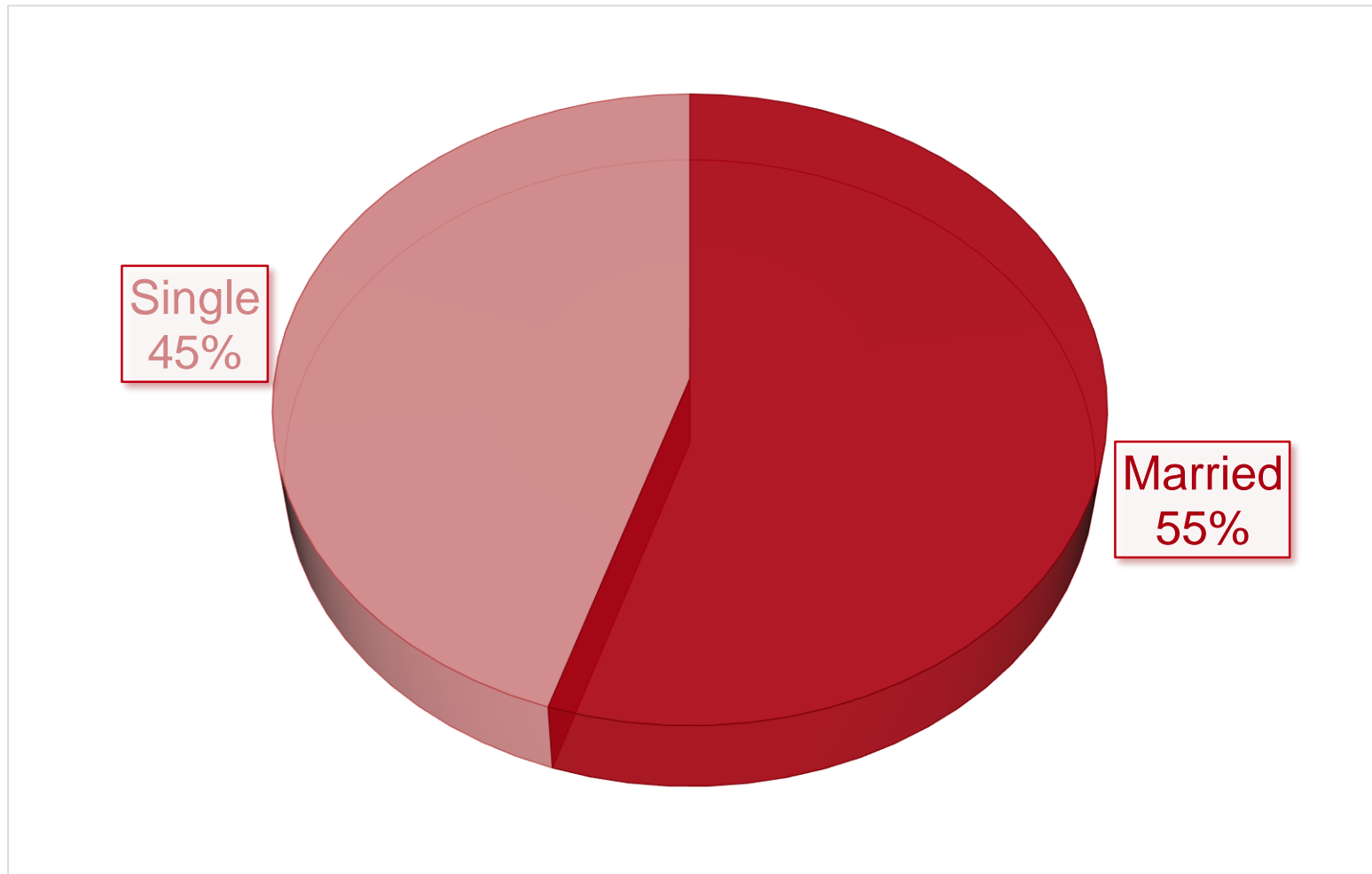
Key Highlighted Segments

- **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

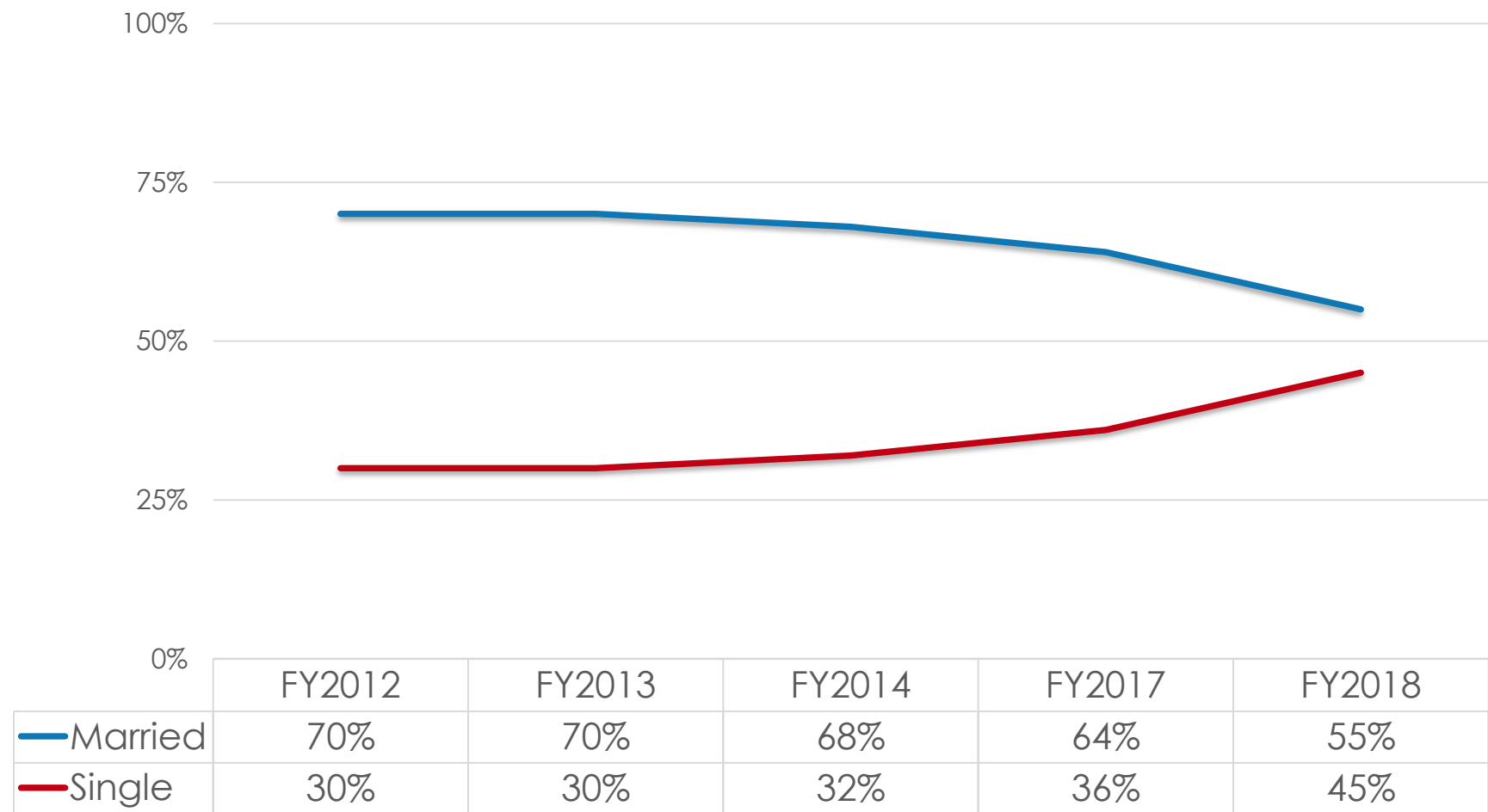
Key Highlighted Segments



Marital Status

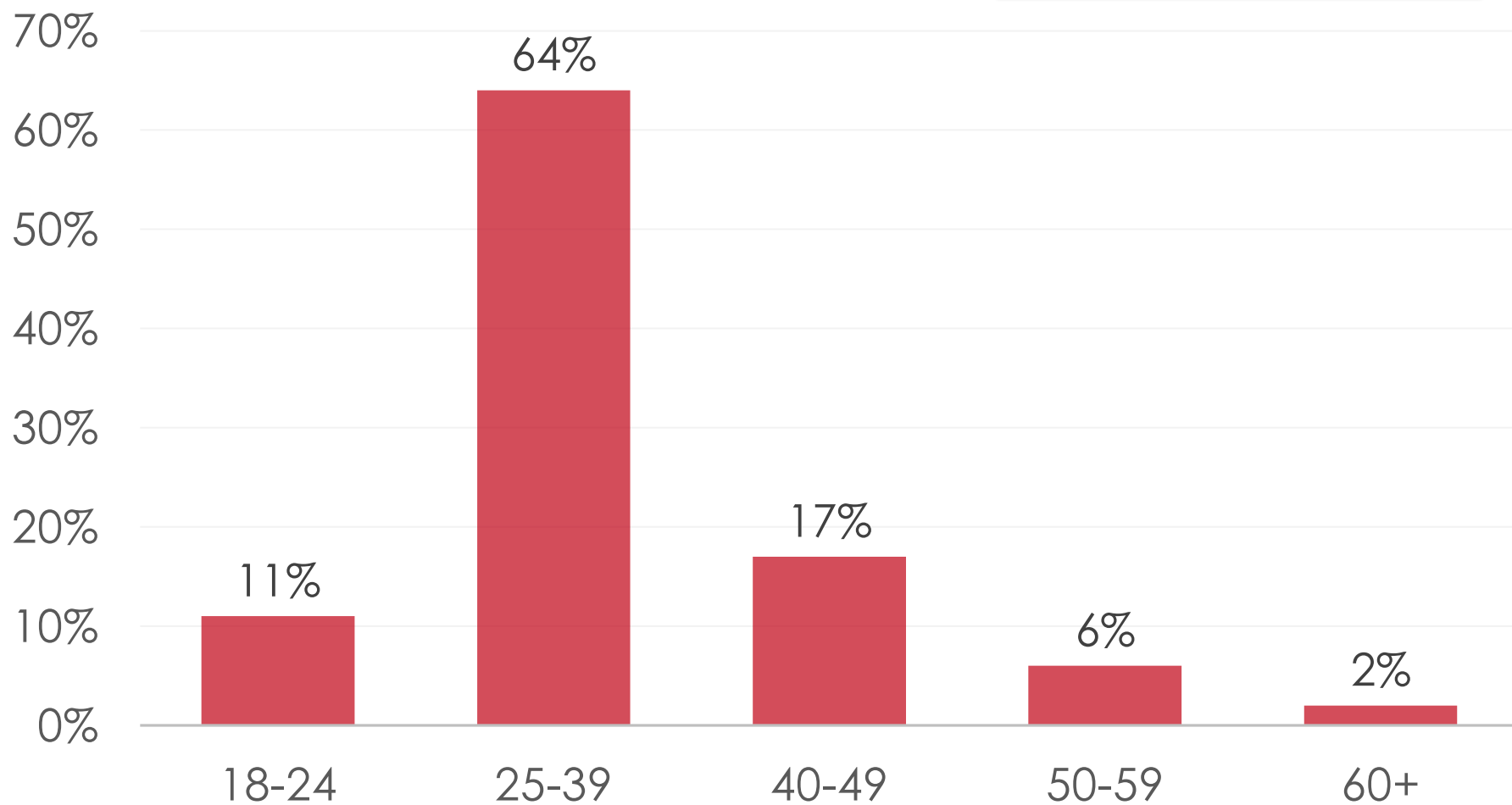


Marital status – Tracking

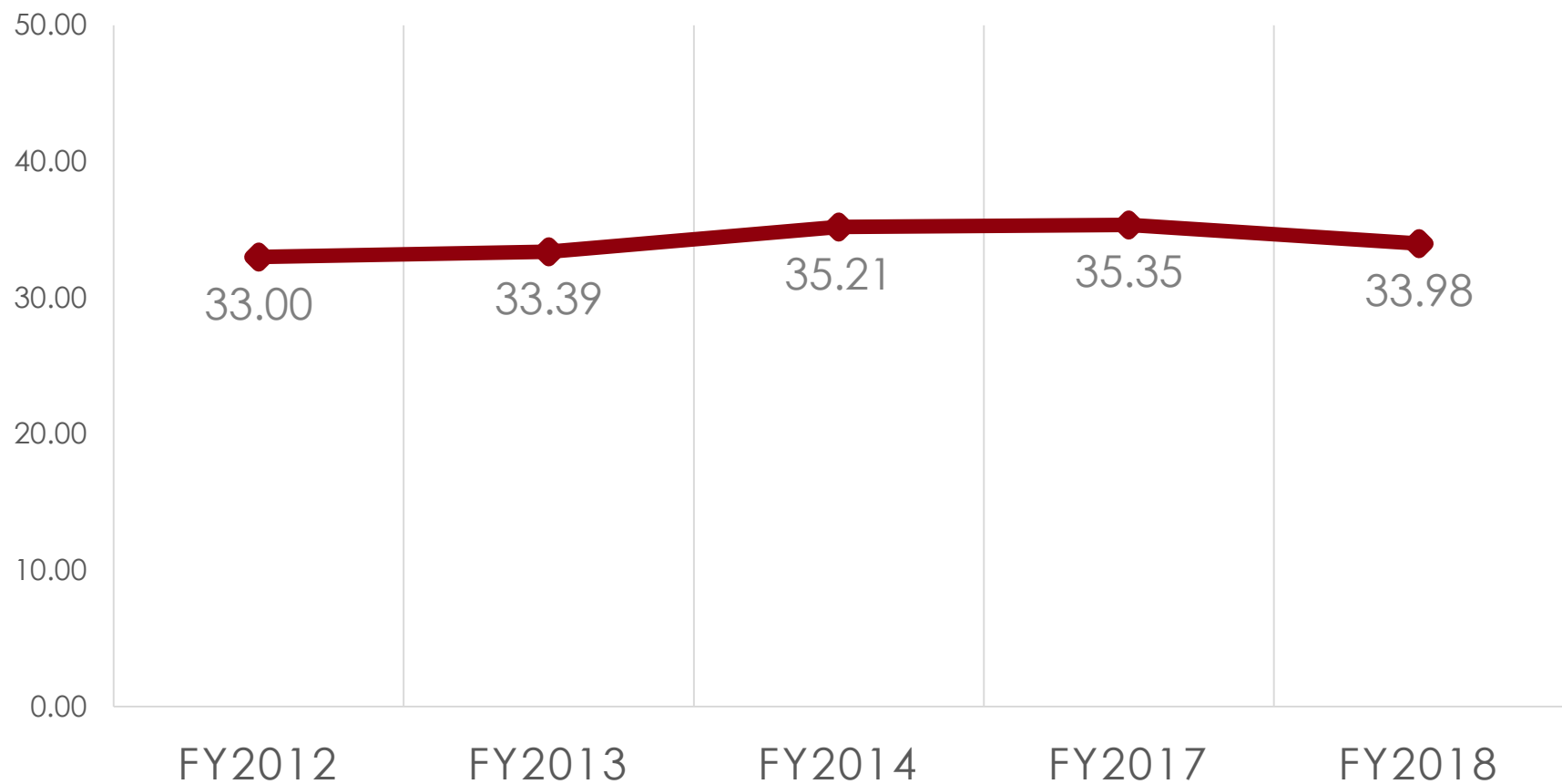


Age

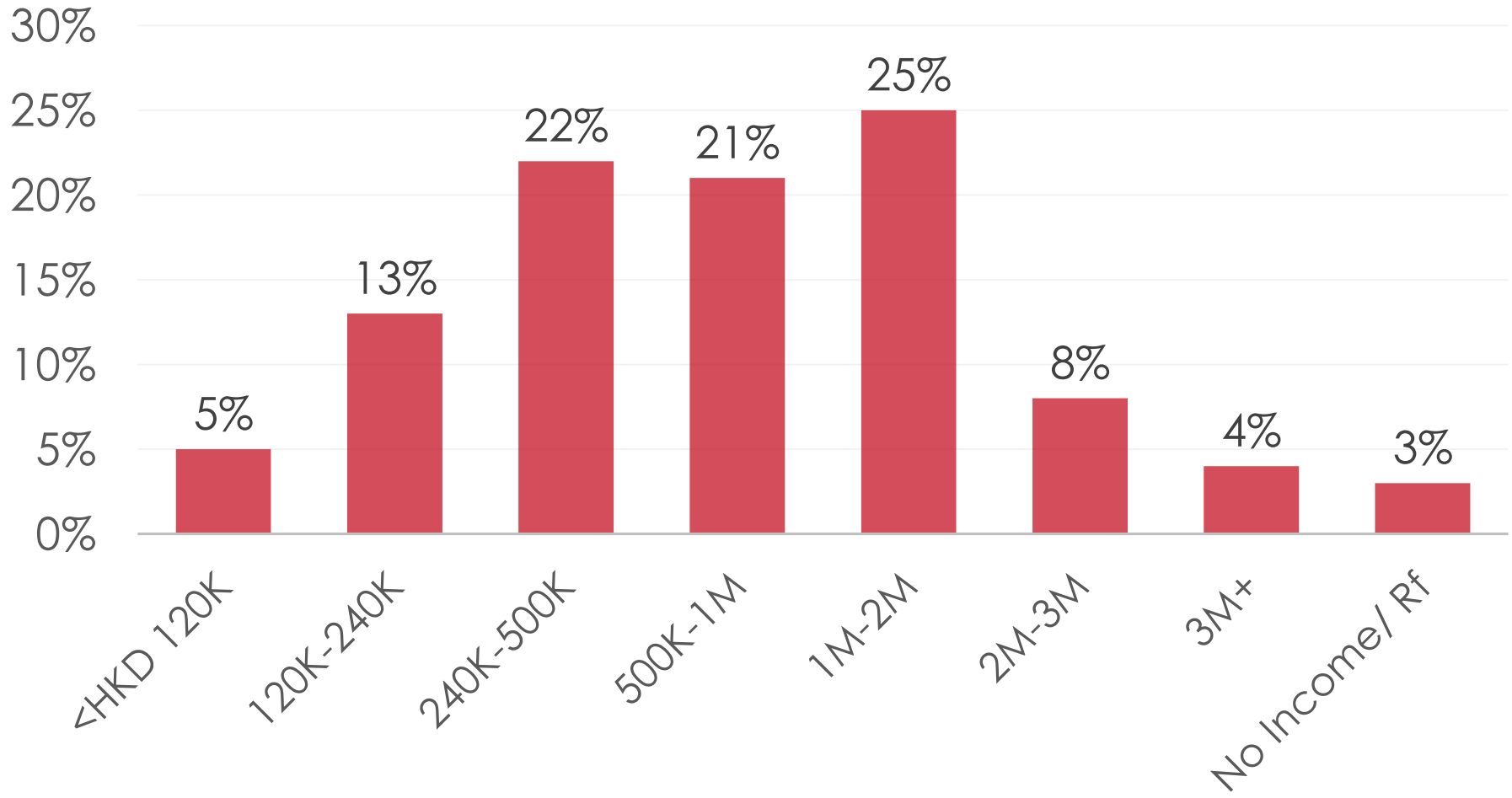
MEAN = 33.98
MEDIAN = 32



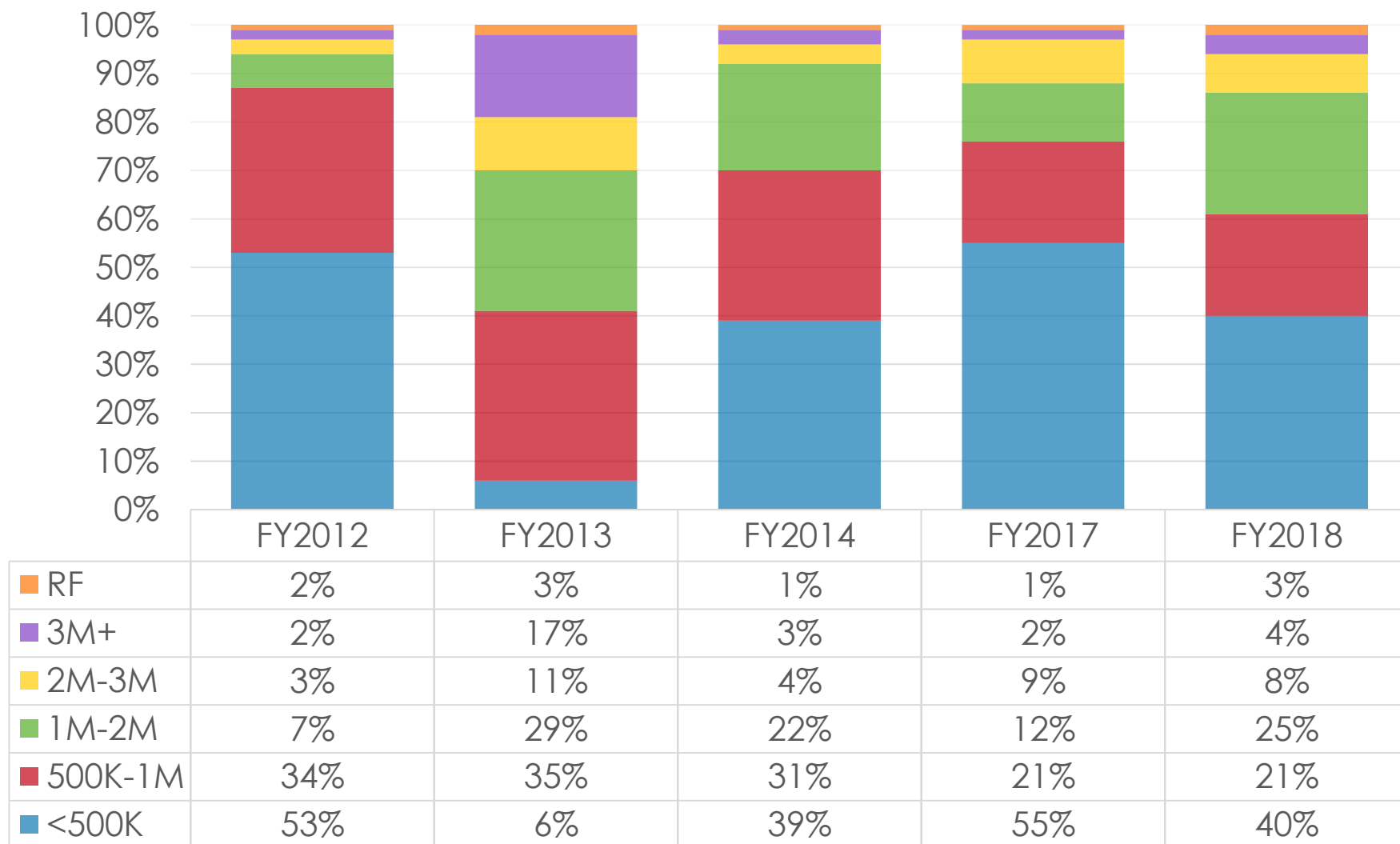
Age – Tracking



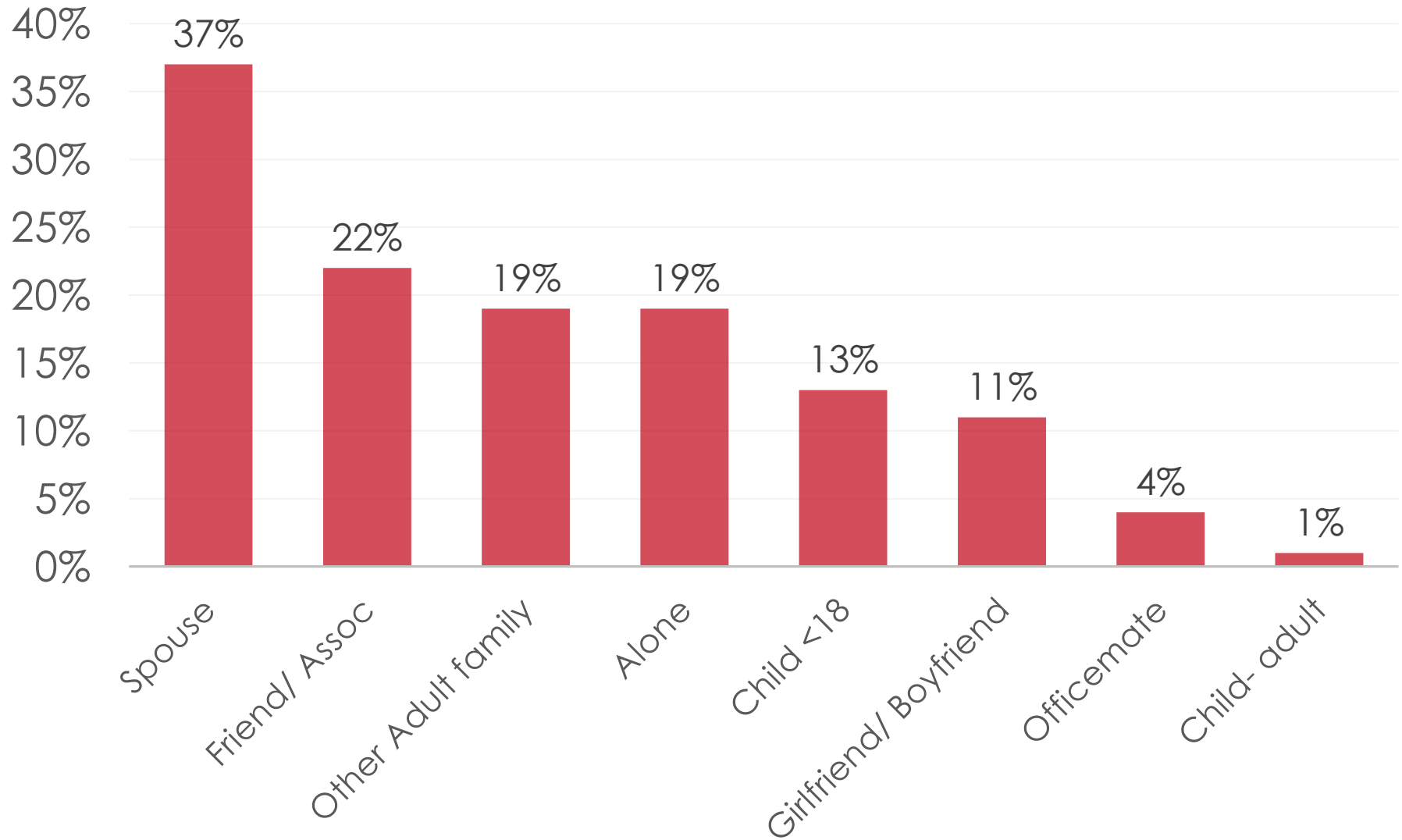
Annual Household Income



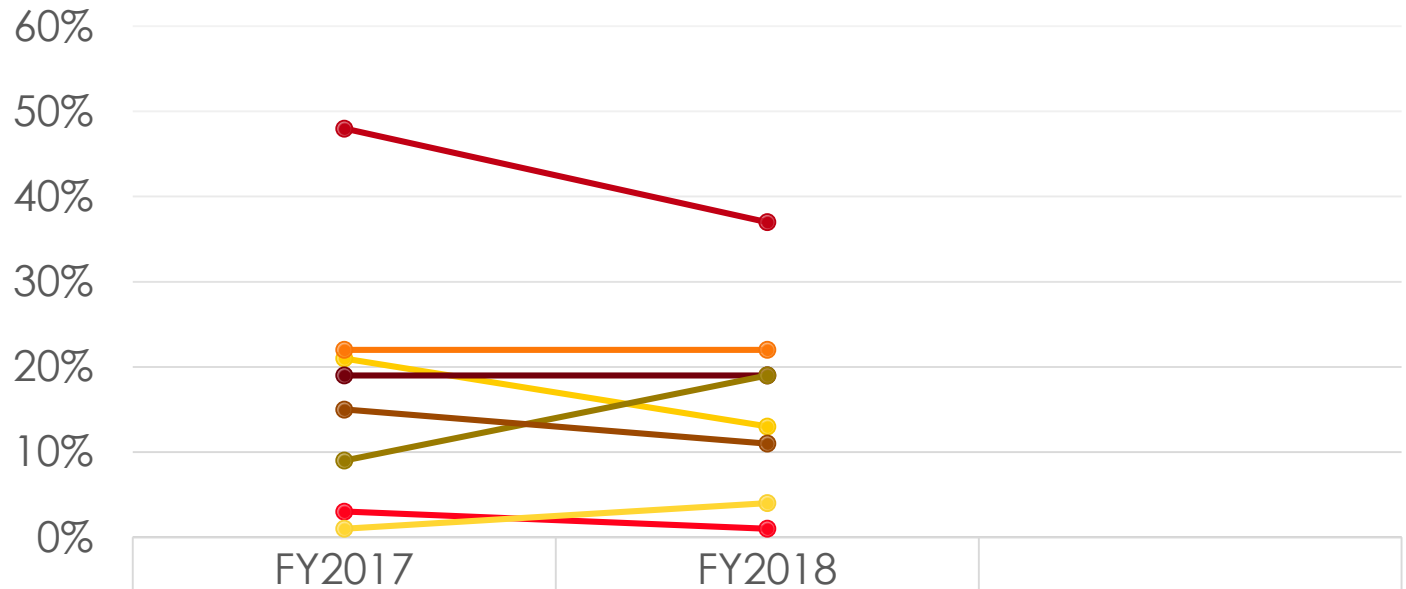
Annual Household Income - Tracking



Travel Party



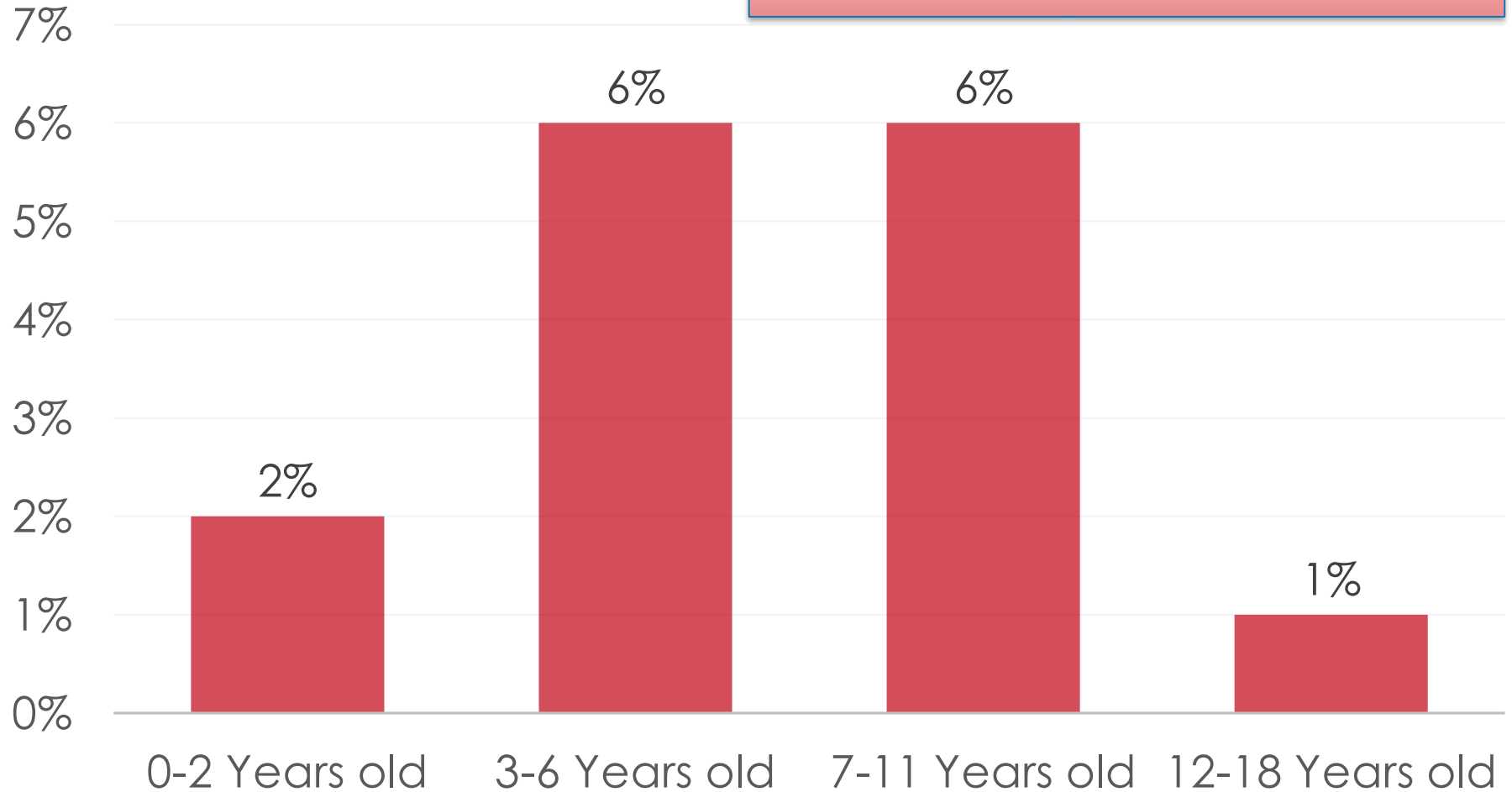
Travel Party



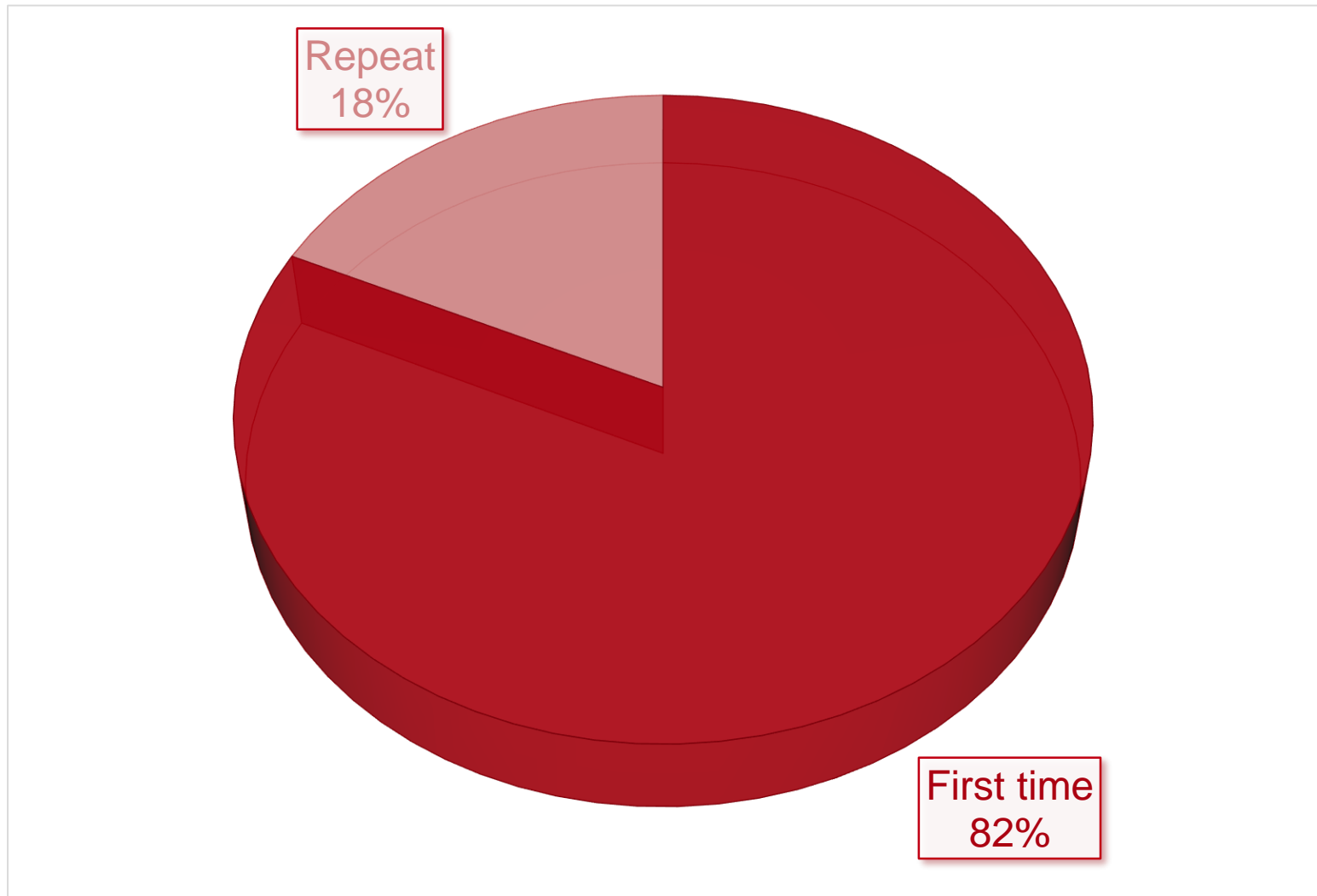
| | | | |
|-----------------------|--------|--------|--|
| Spouse | FY2017 | FY2018 | |
| Child <18 | | | |
| Friend/ Assoc | | | |
| Other Adult Family | | | |
| Alone | | | |
| Girlfriend/ Boyfriend | | | |
| Child- Adult | | | |
| Office | | | |

Travel Party - Children

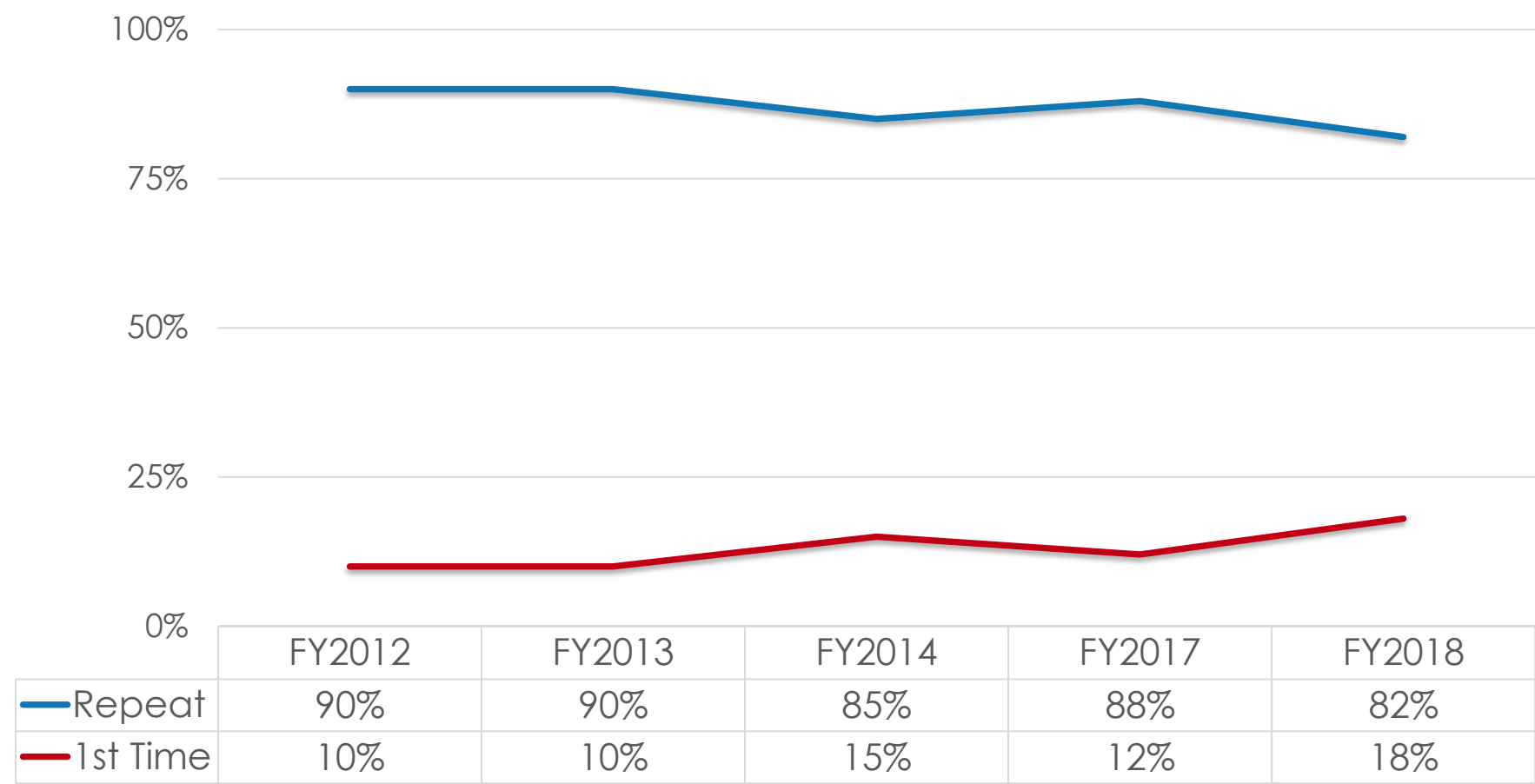
13% TRAVELING WITH A CHILD



Trips to Guam

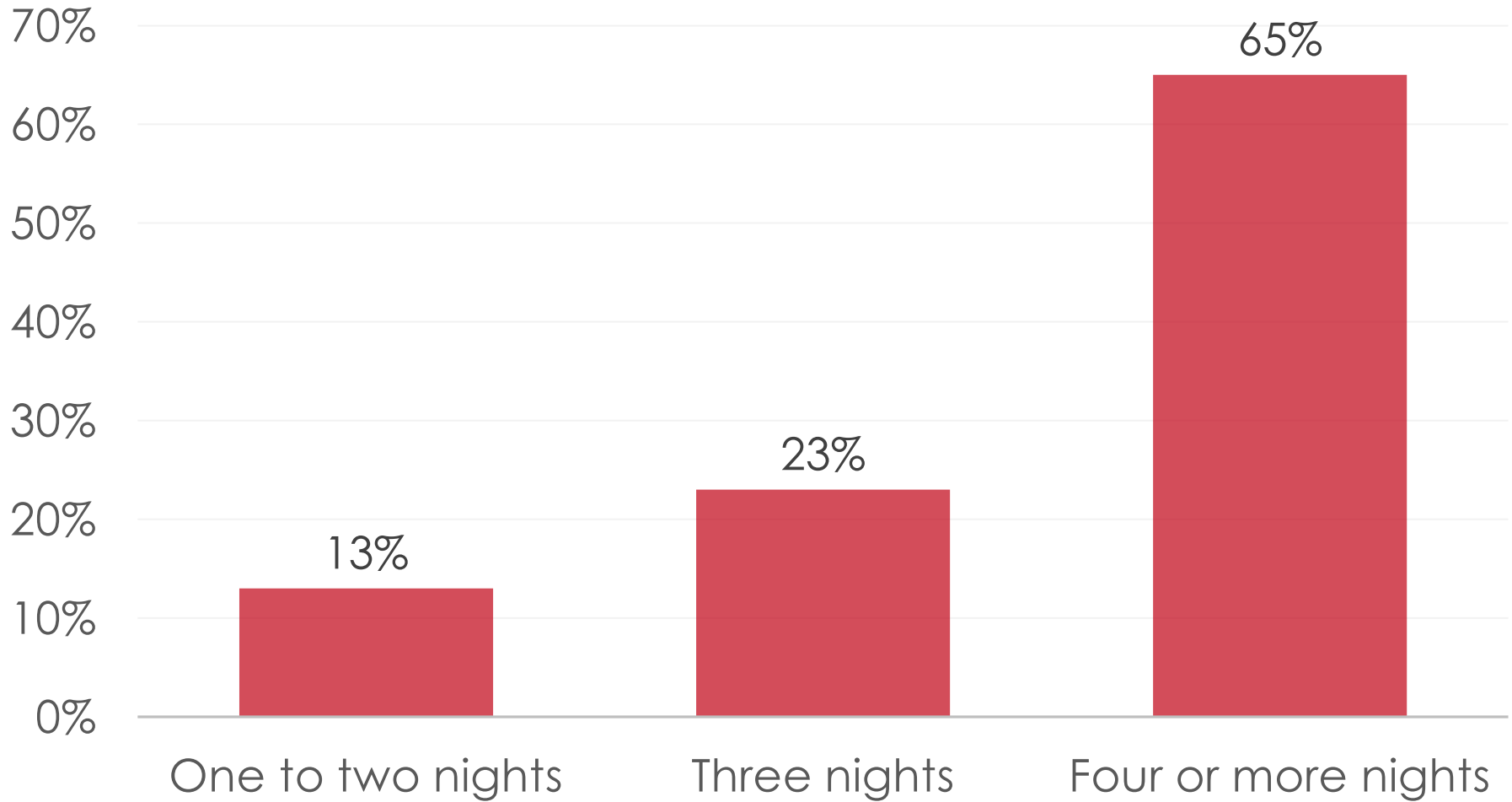


Trips to Guam – Tracking

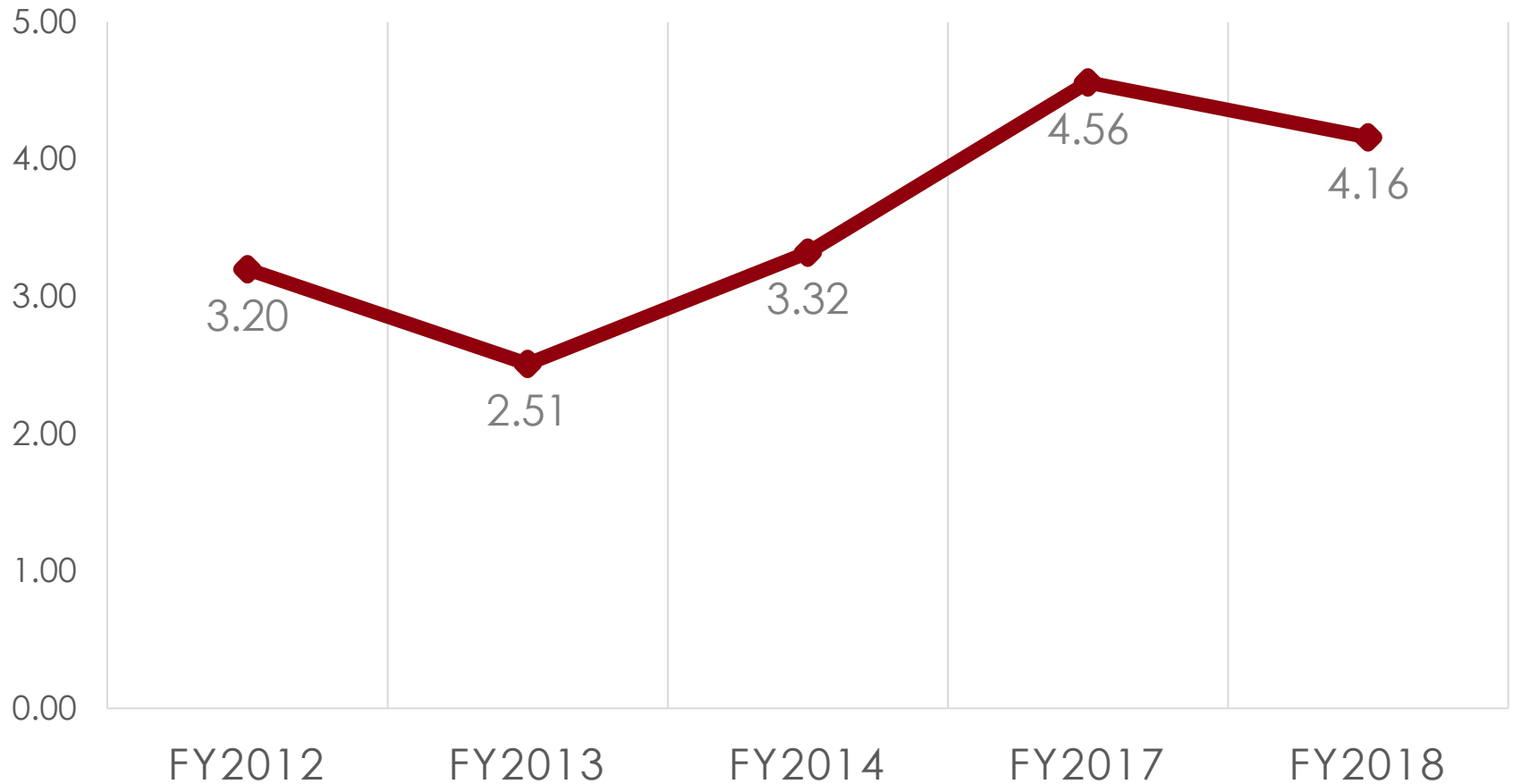


Length of Stay

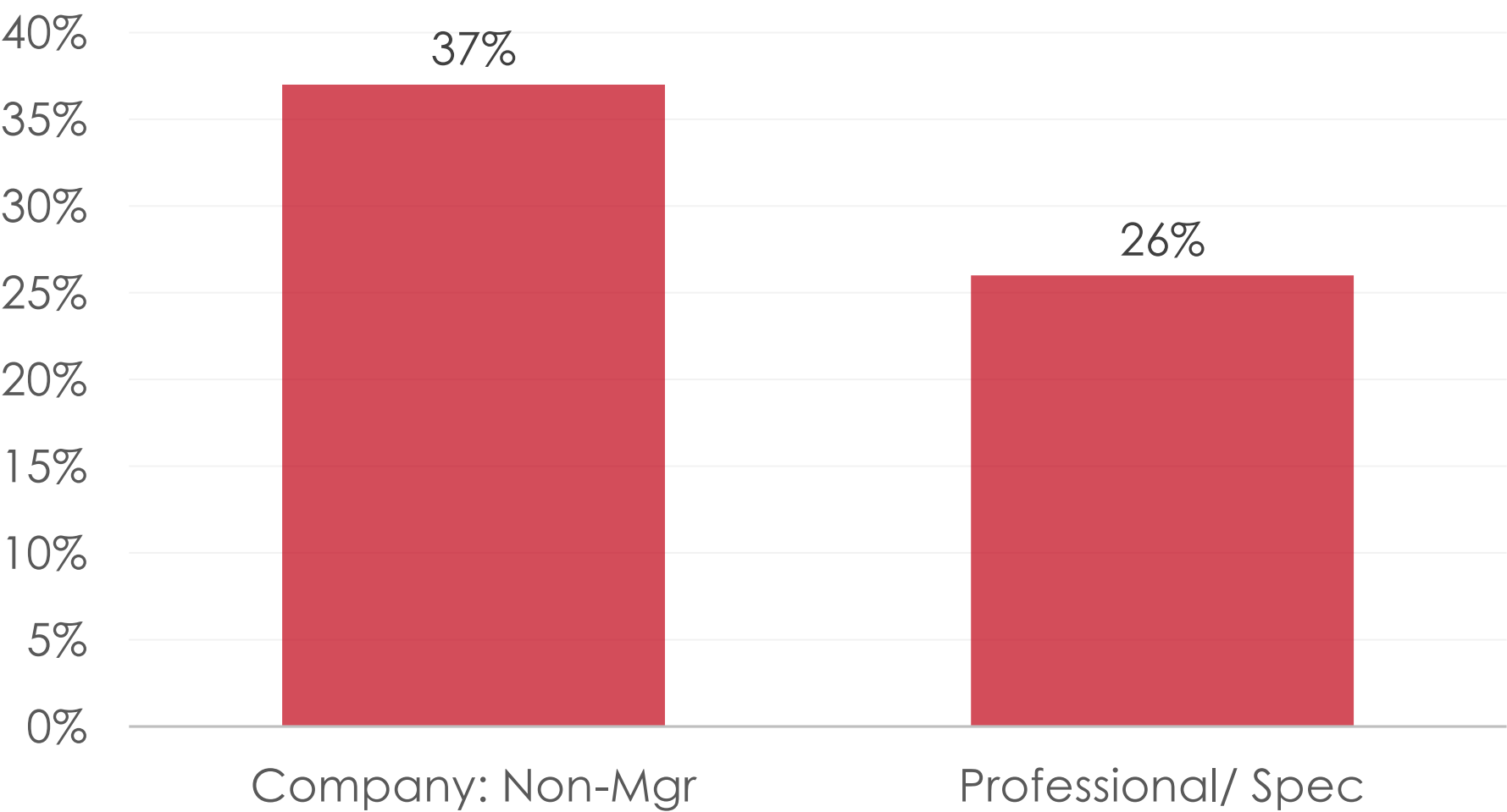
MEAN NUMBER OF NIGHTS = 4.16
MEDIAN NUMBER OF NIGHTS = 4



Length of Stay – Tracking



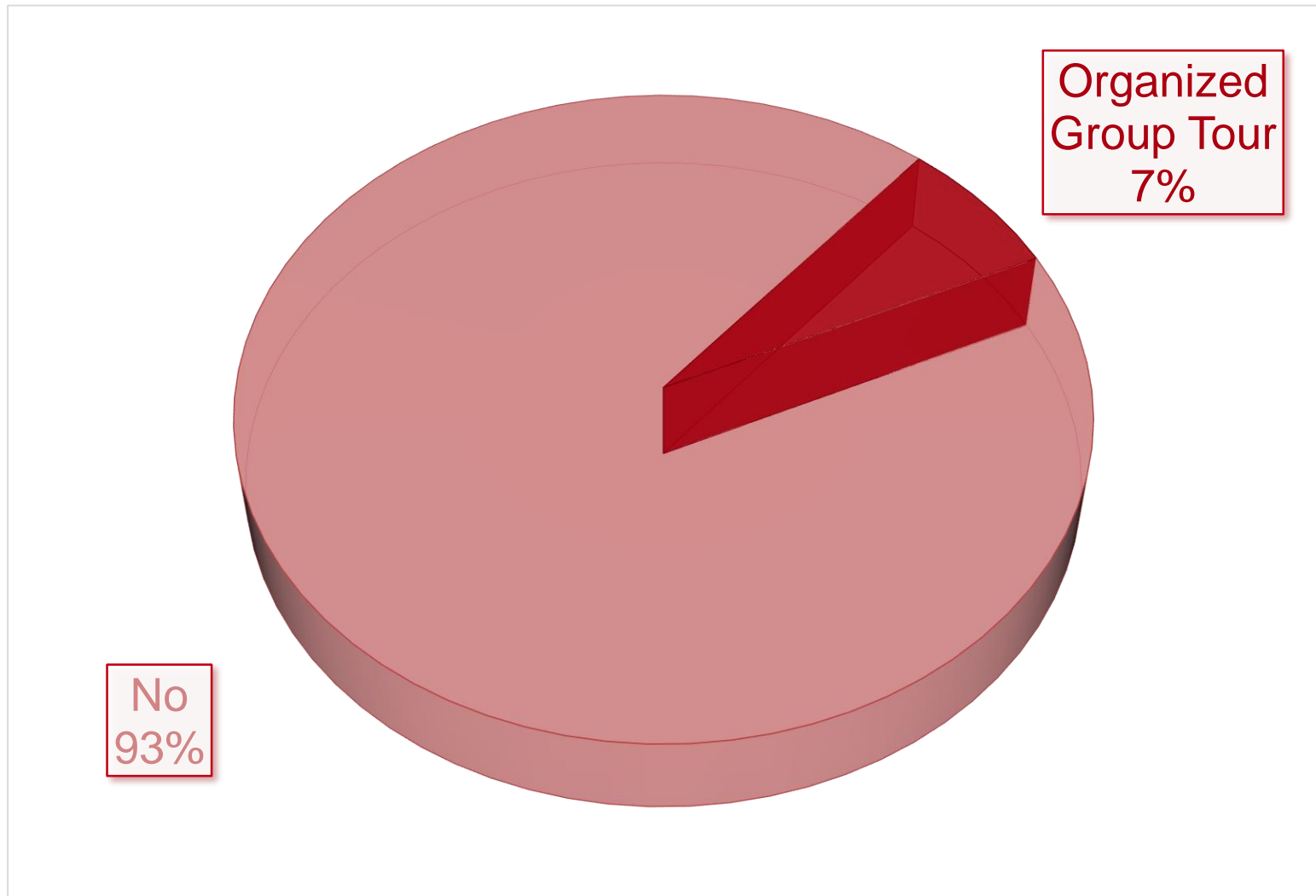
Occupation – Top Responses (10%+)



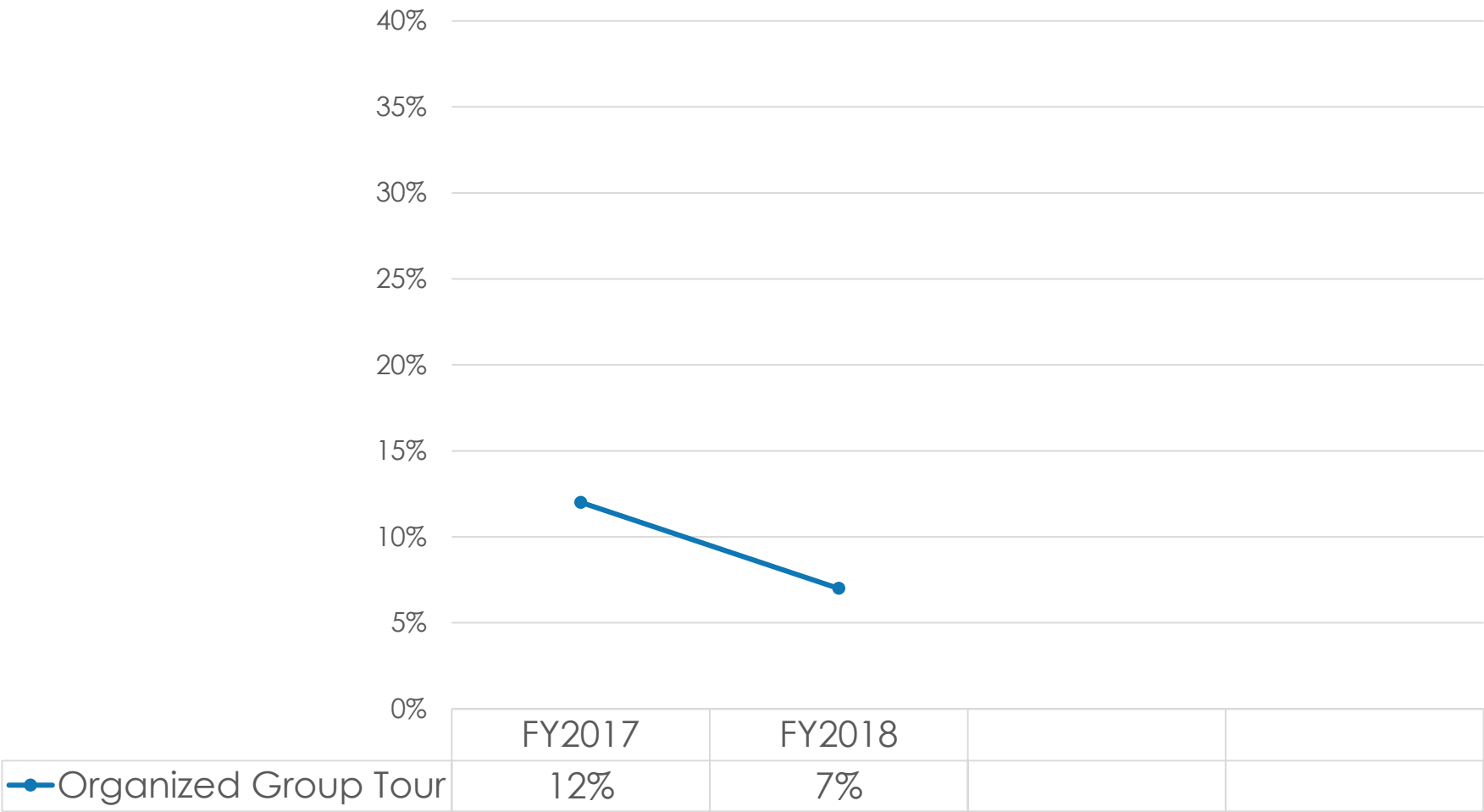
SECTION 2

TRAVEL PLANNING

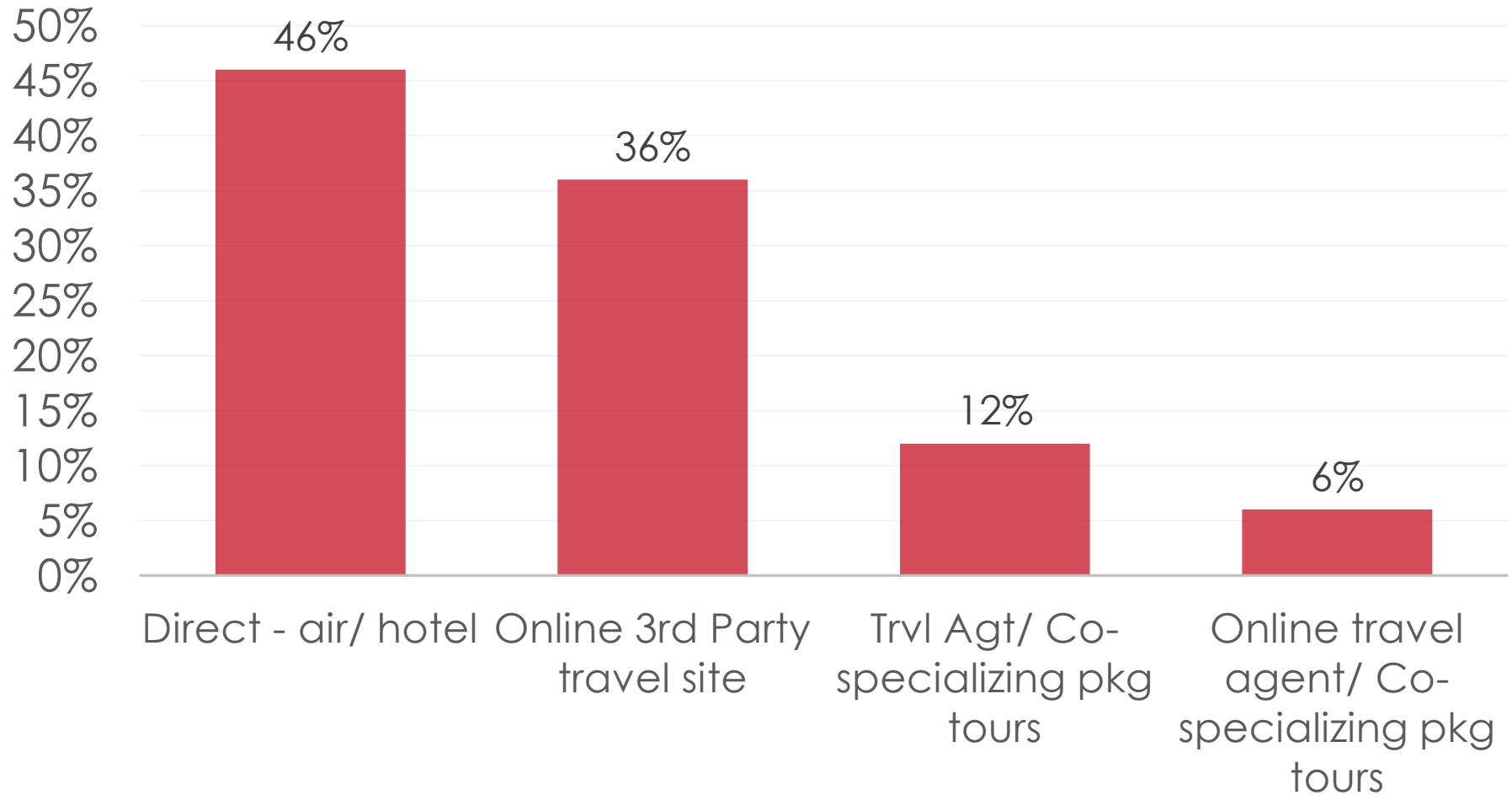
ORGANIZED GROUP TOUR



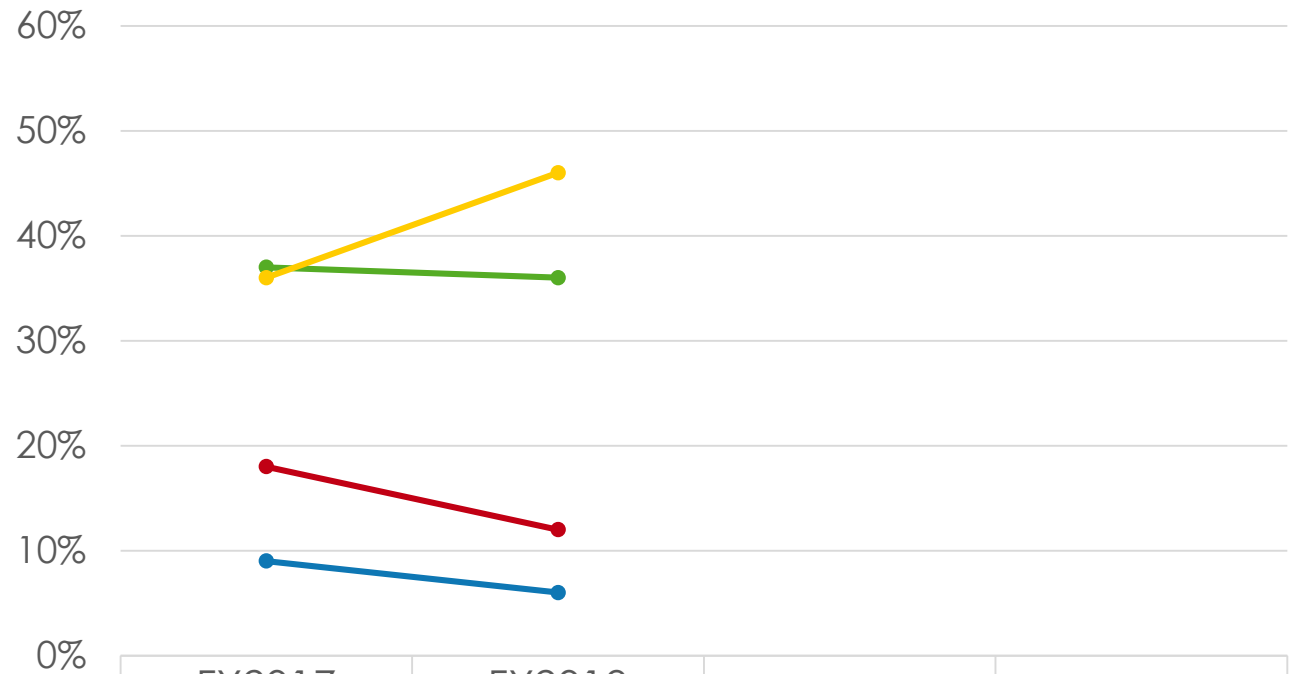
ORGANIZED GROUP TOUR



Travel Arrangements

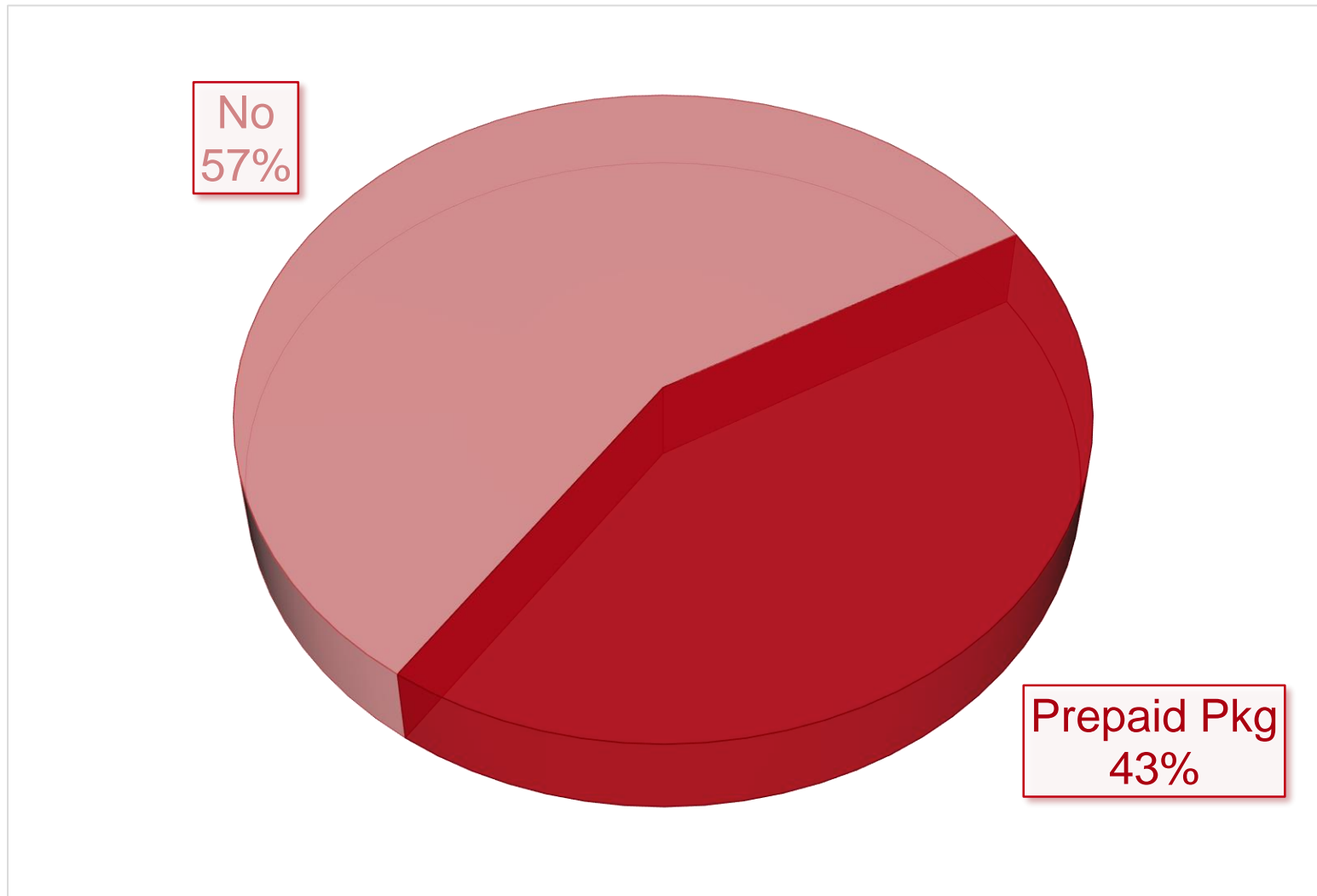


Travel Arrangements – Tracking

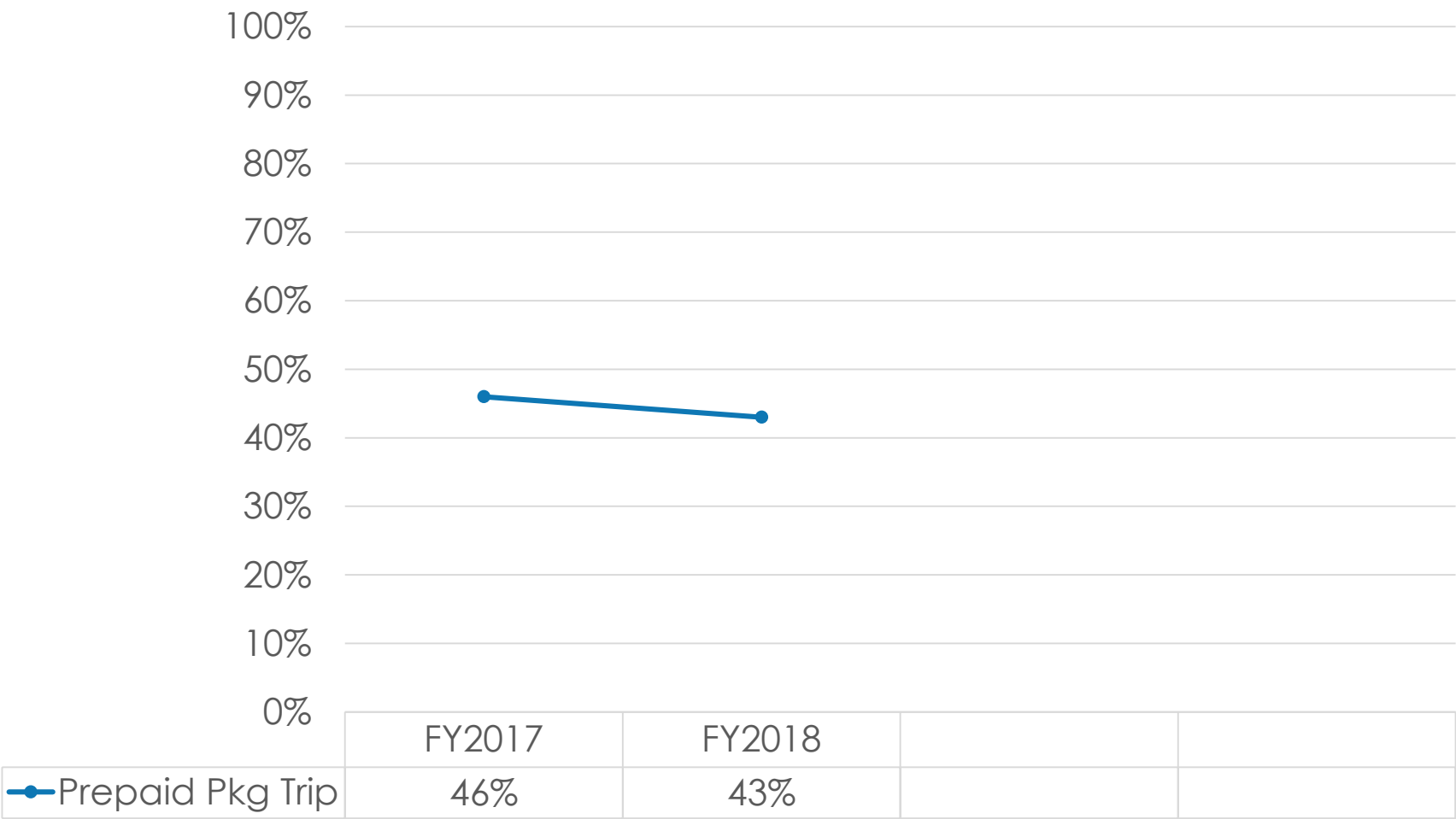


| | FY2017 | FY2018 | | |
|------------------------|--------|--------|--|--|
| Online travel agent | 9% | 6% | | |
| Trvl Agt/ Co- Pkg Tour | 18% | 12% | | |
| Online 3rd Party | 37% | 36% | | |
| Direct Air/ Hotel | 36% | 46% | | |

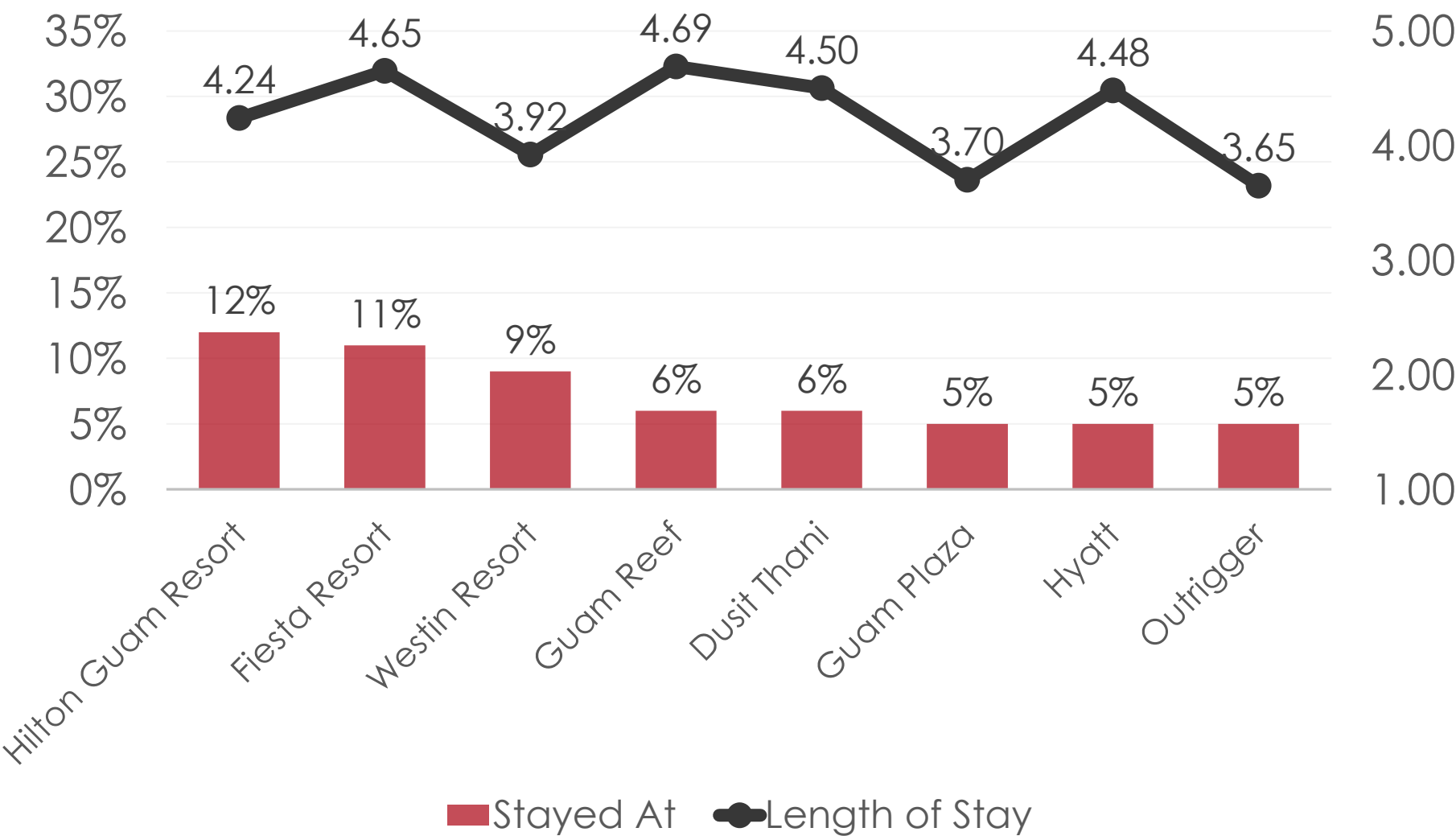
Prepaid Package Trip



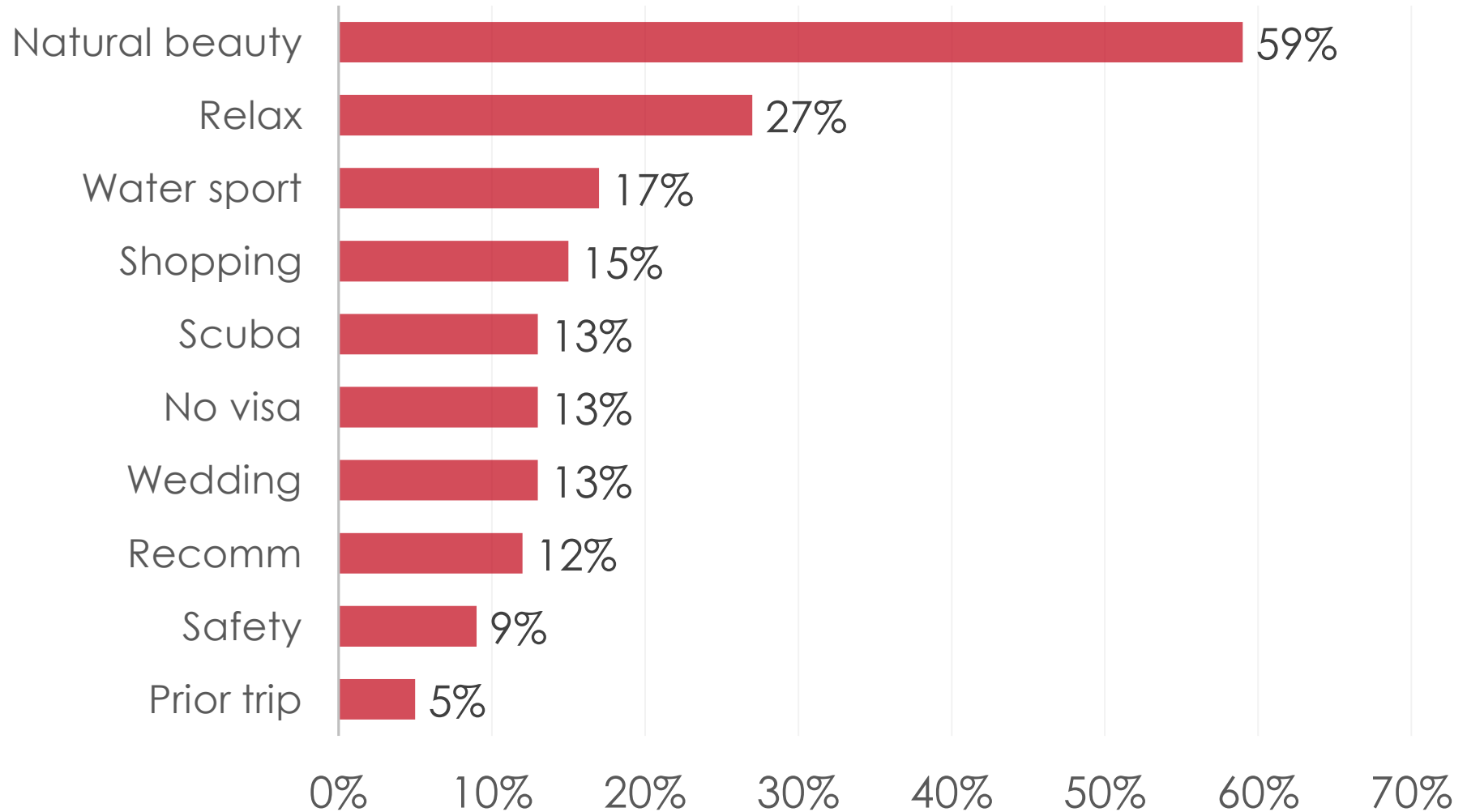
Prepaid Package Trip



Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Top 3

| FY2017 | FY2018 |
|--|--|
| 63% Natural beauty 30% Relax 25% Water sports | 59% Natural beauty 27% Relax 17% Water sports |

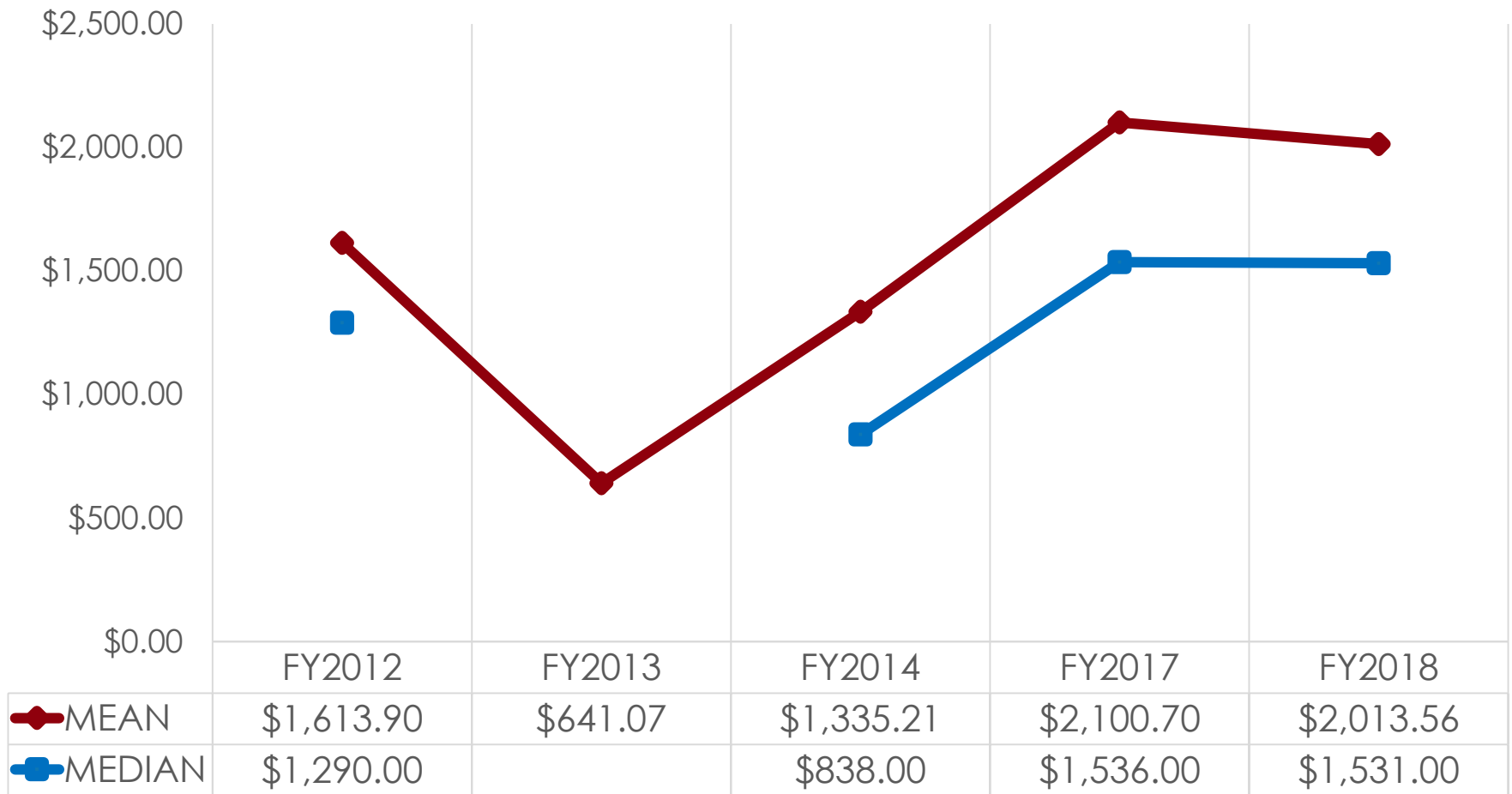
SECTION 3

EXPENDITURES

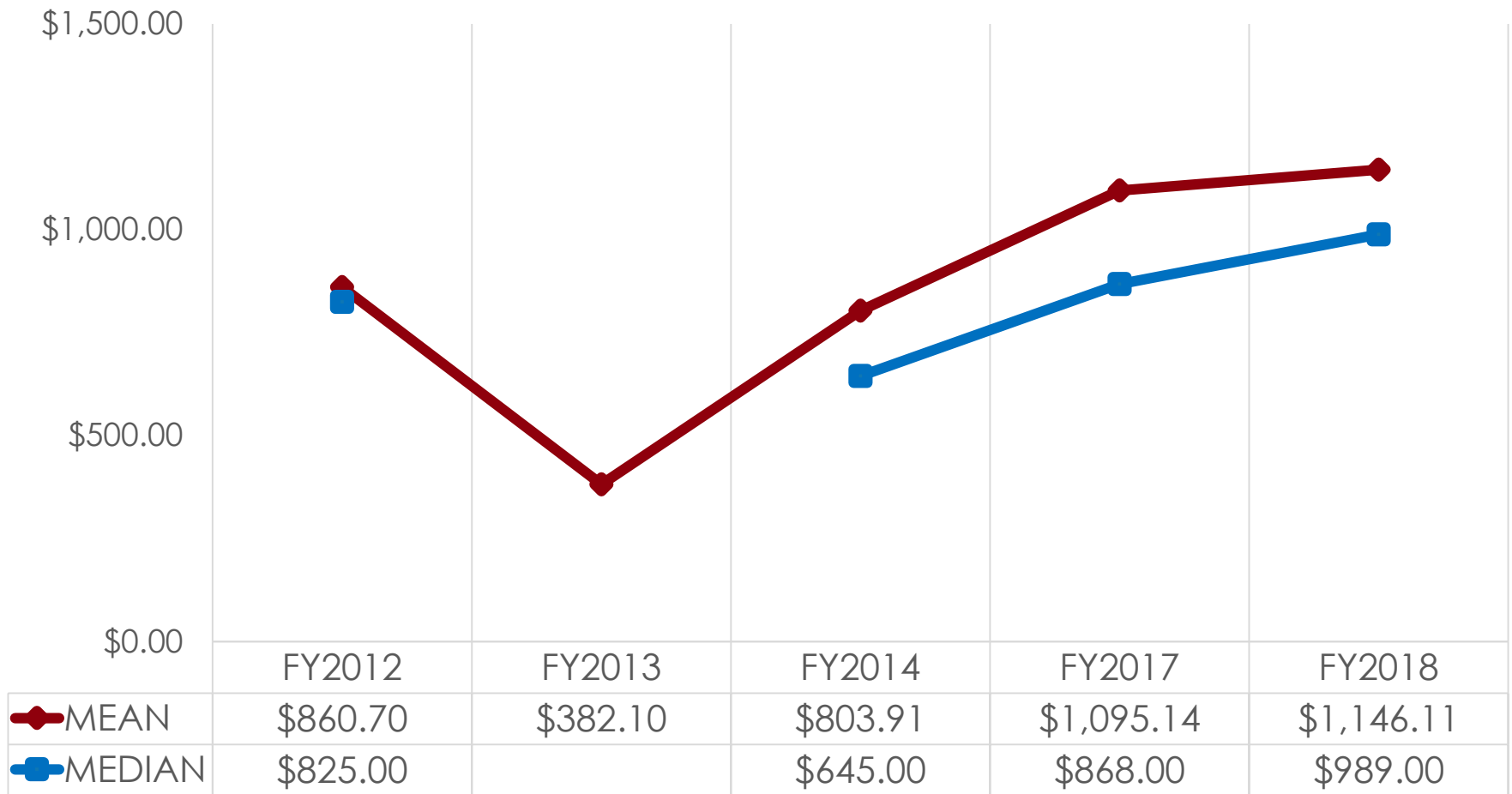
Prepaid Expenditures

- \$2,013.56 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$1,146.11 = overall mean average per person prepaid expenditures

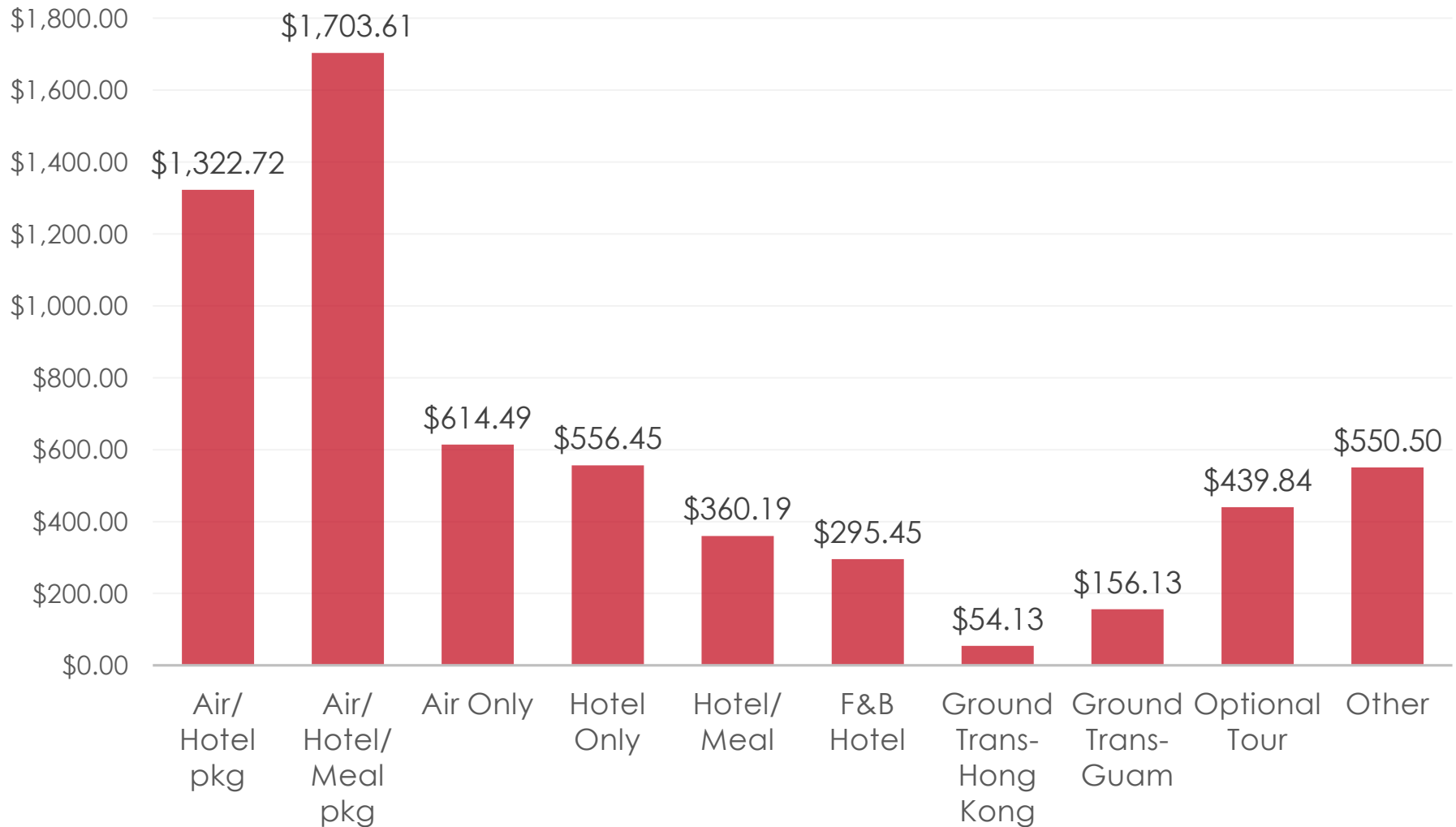
Prepaid Entire Travel Party – Tracking



Prepaid Per Person – Tracking

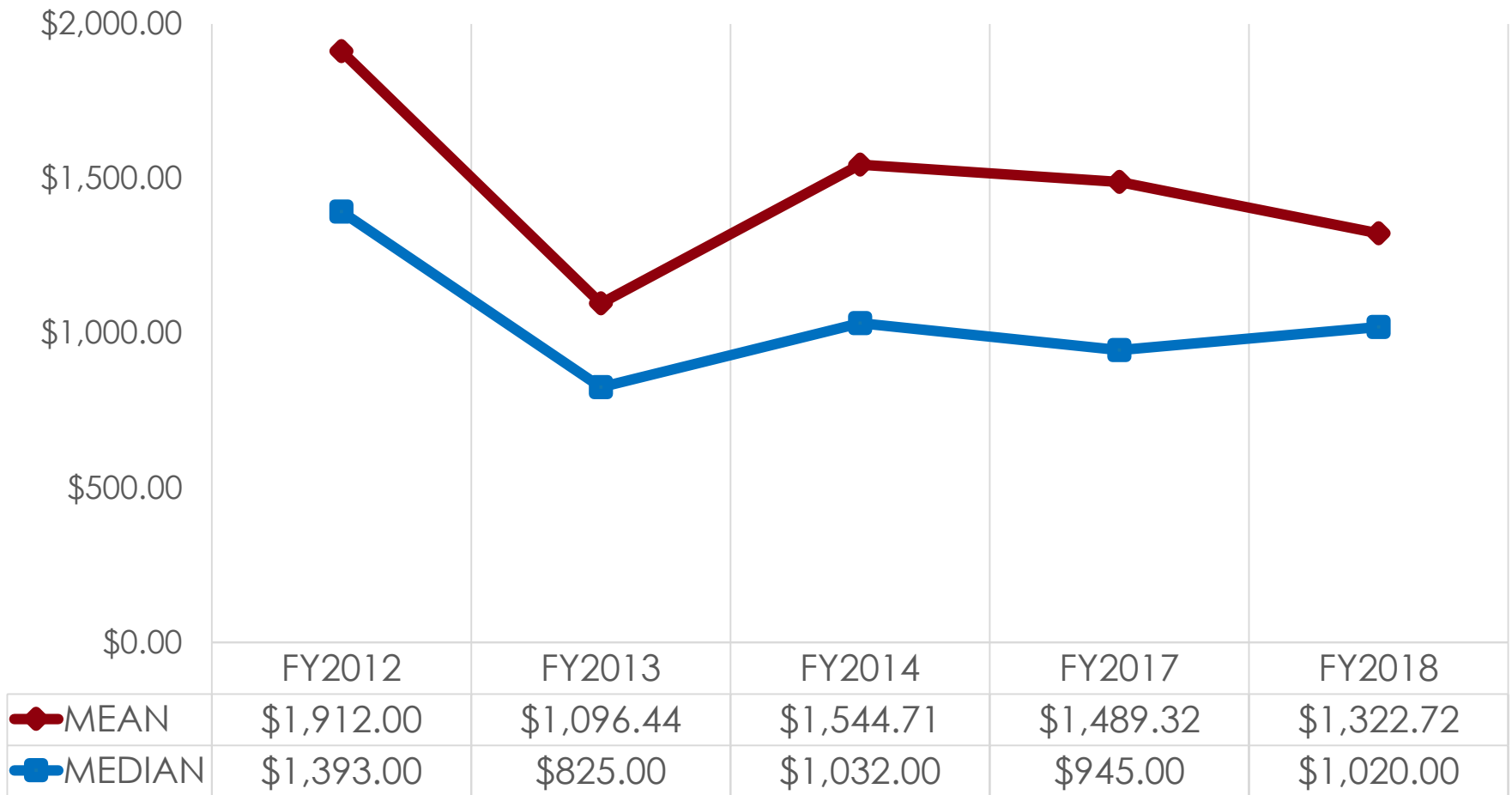


Prepaid Expenses by Category – Mean Entire Travel Party



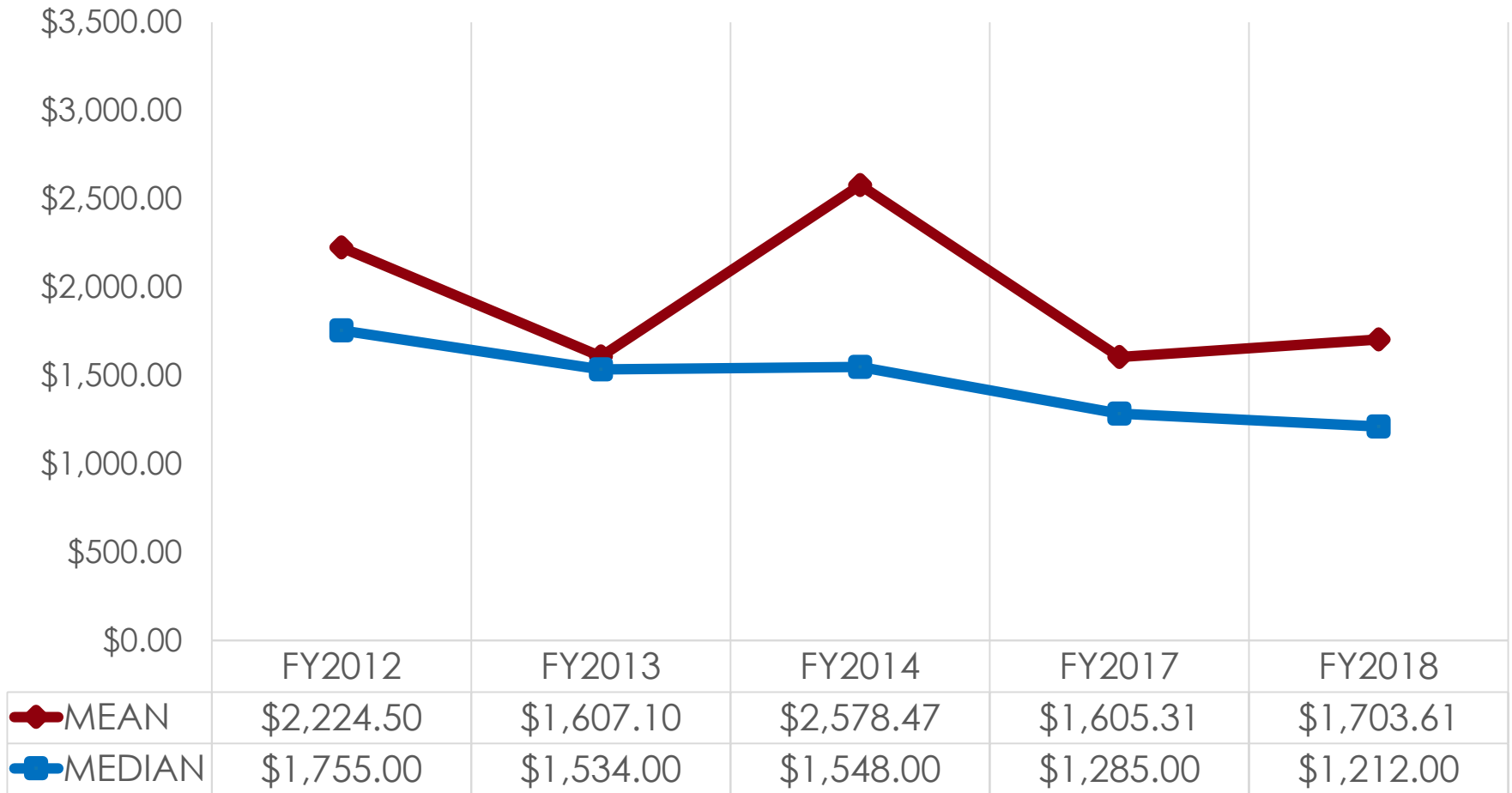
Prepaid – Tracking

Airfare & Accommodation Packages

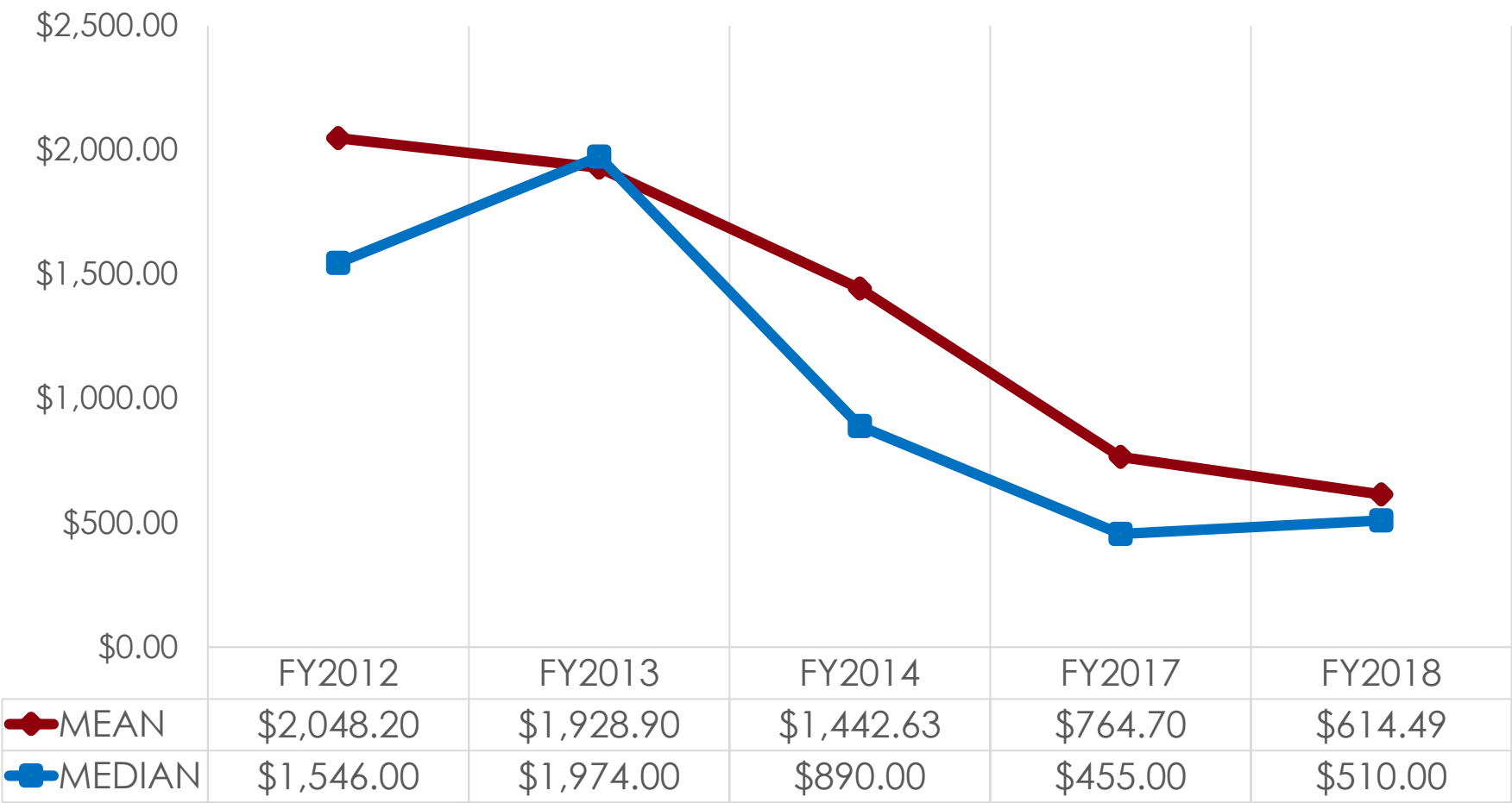


Prepaid – Tracking

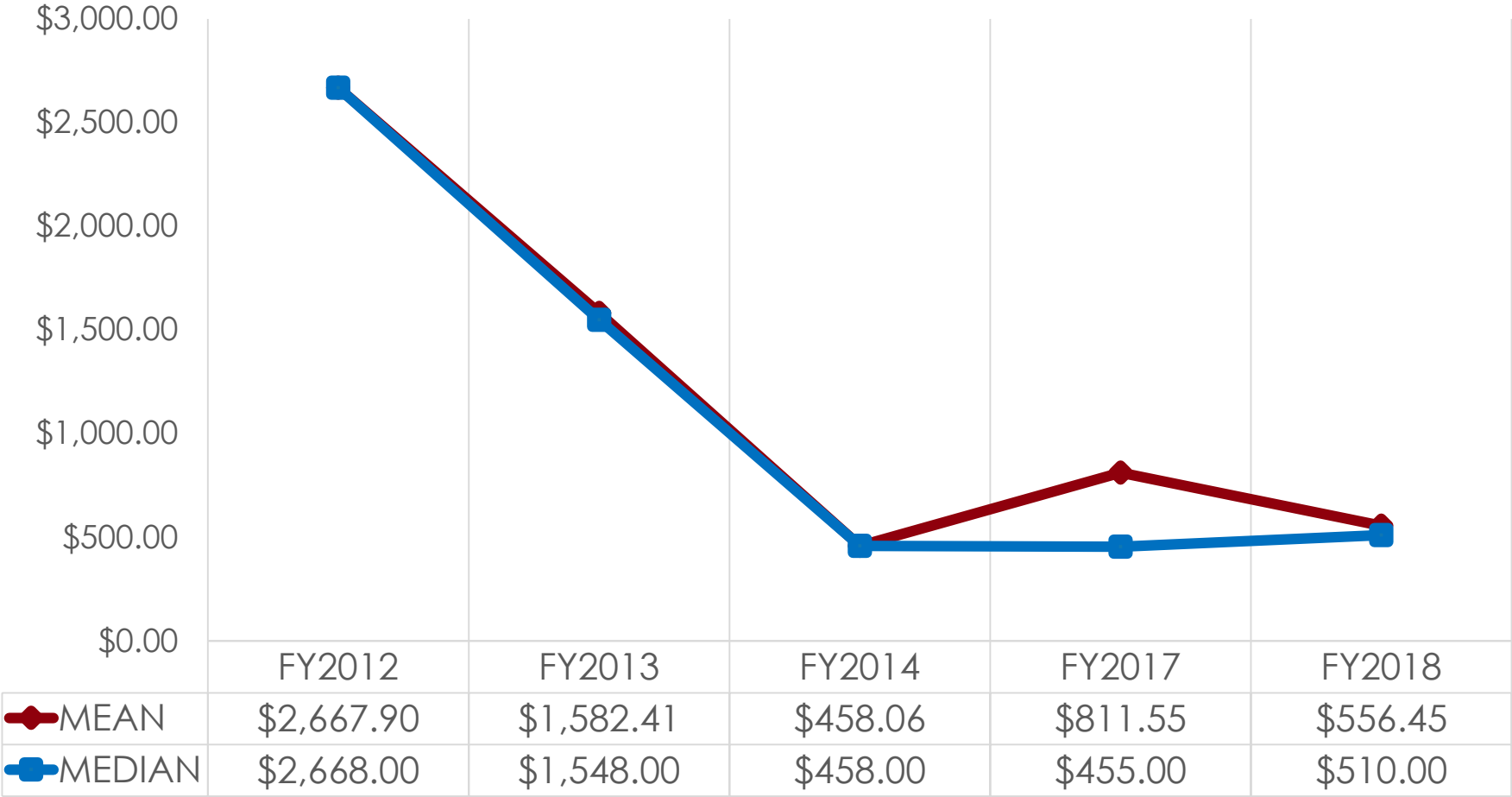
Airfare & Accommodation W/ Meal Packages



Prepaid – Tracking Airfare Only

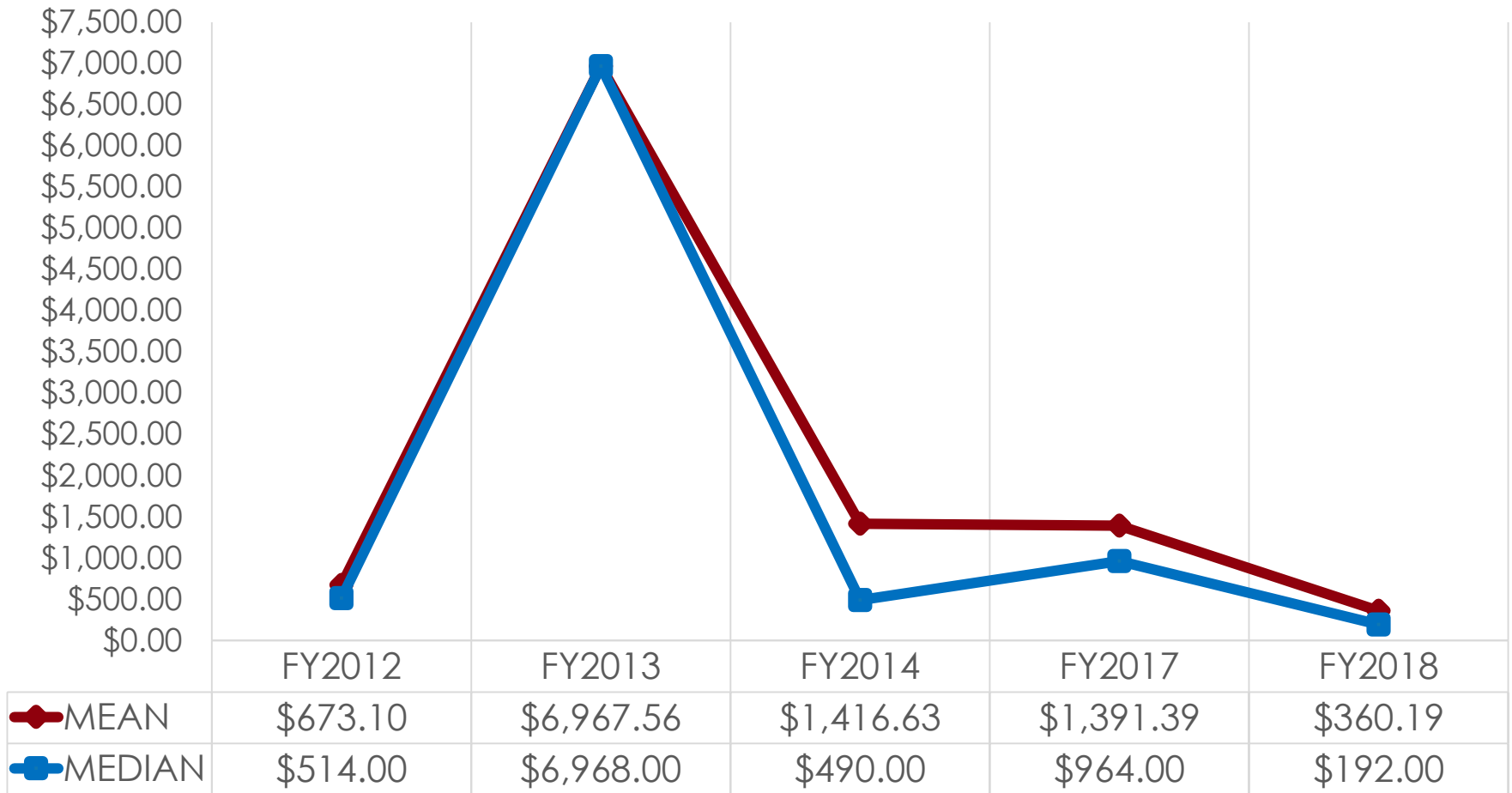


Prepaid – Tracking Accommodations Only

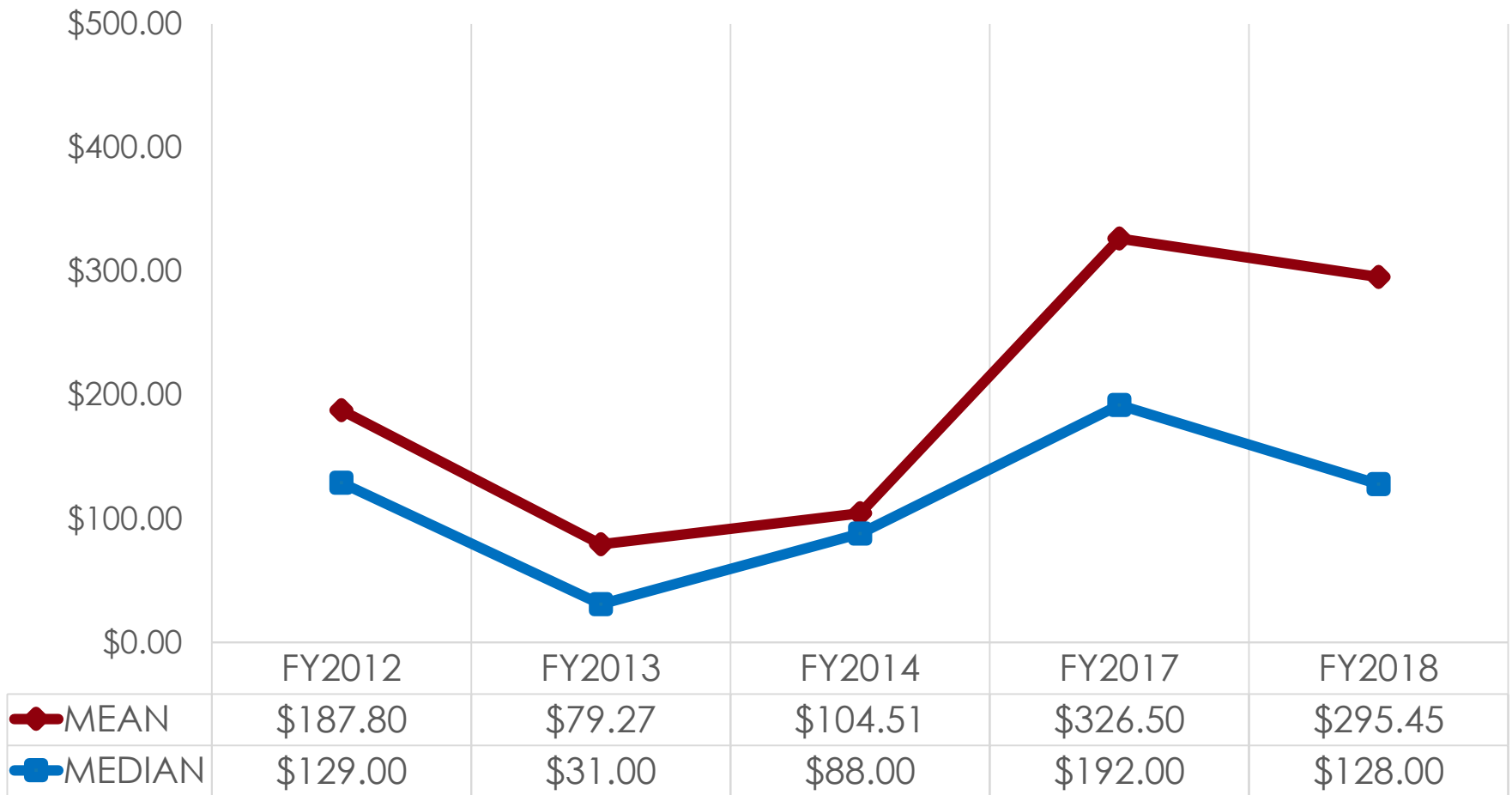


Prepaid – Tracking

Accommodations w/ Meal Only

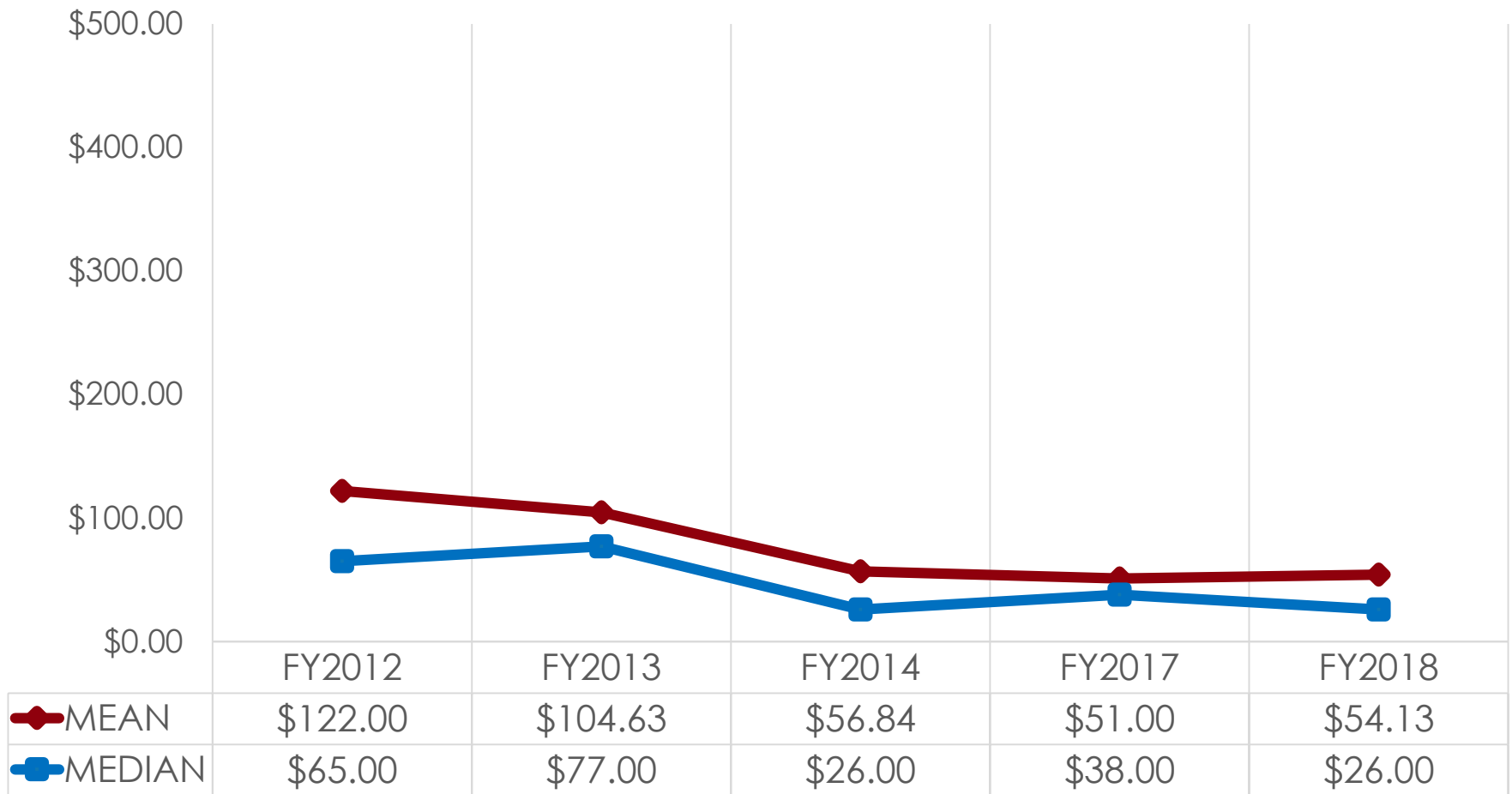


Prepaid – Tracking Food & Beverage in Hotel



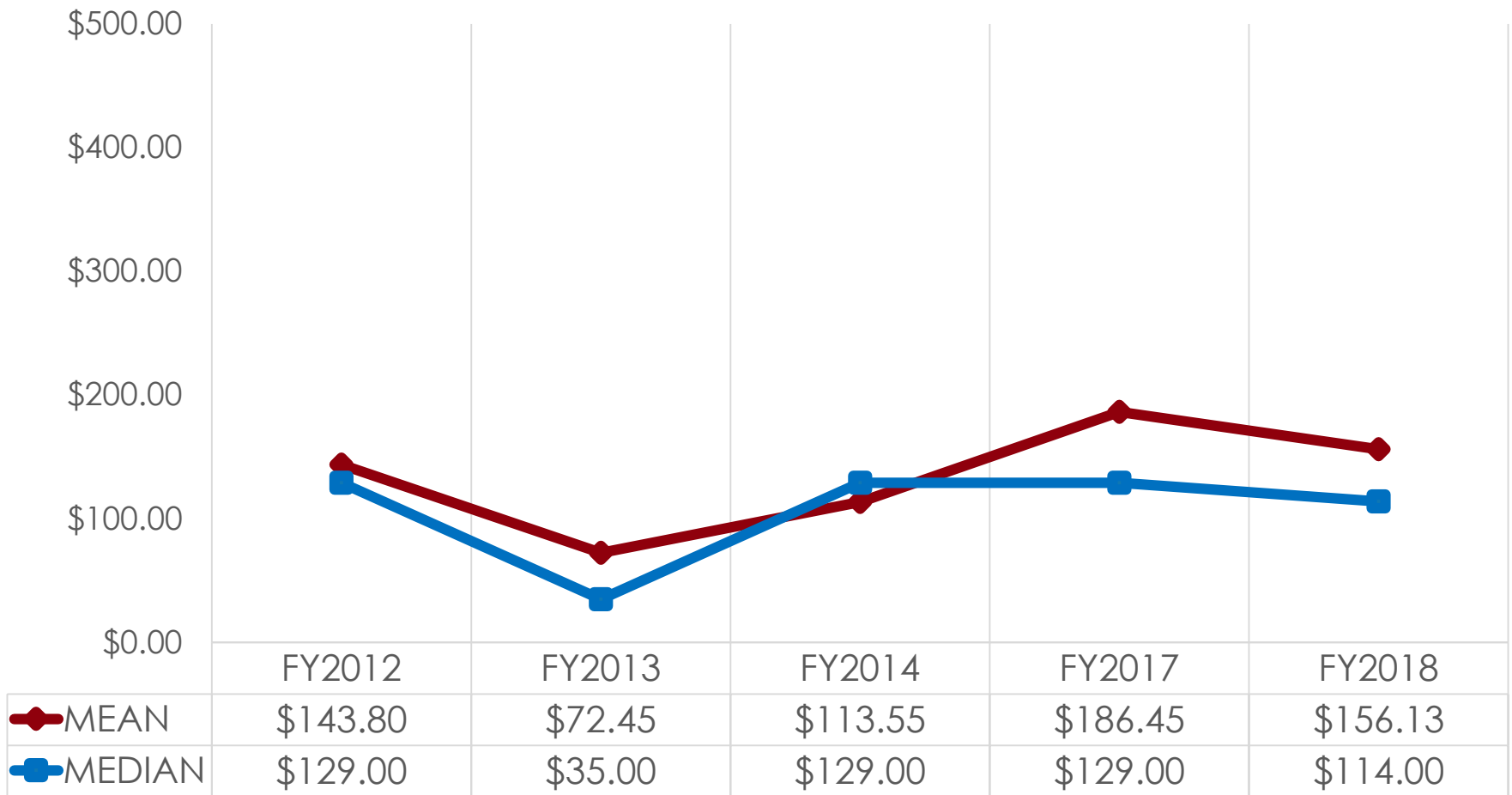
Prepaid – Tracking

Ground Transportation - Hong Kong



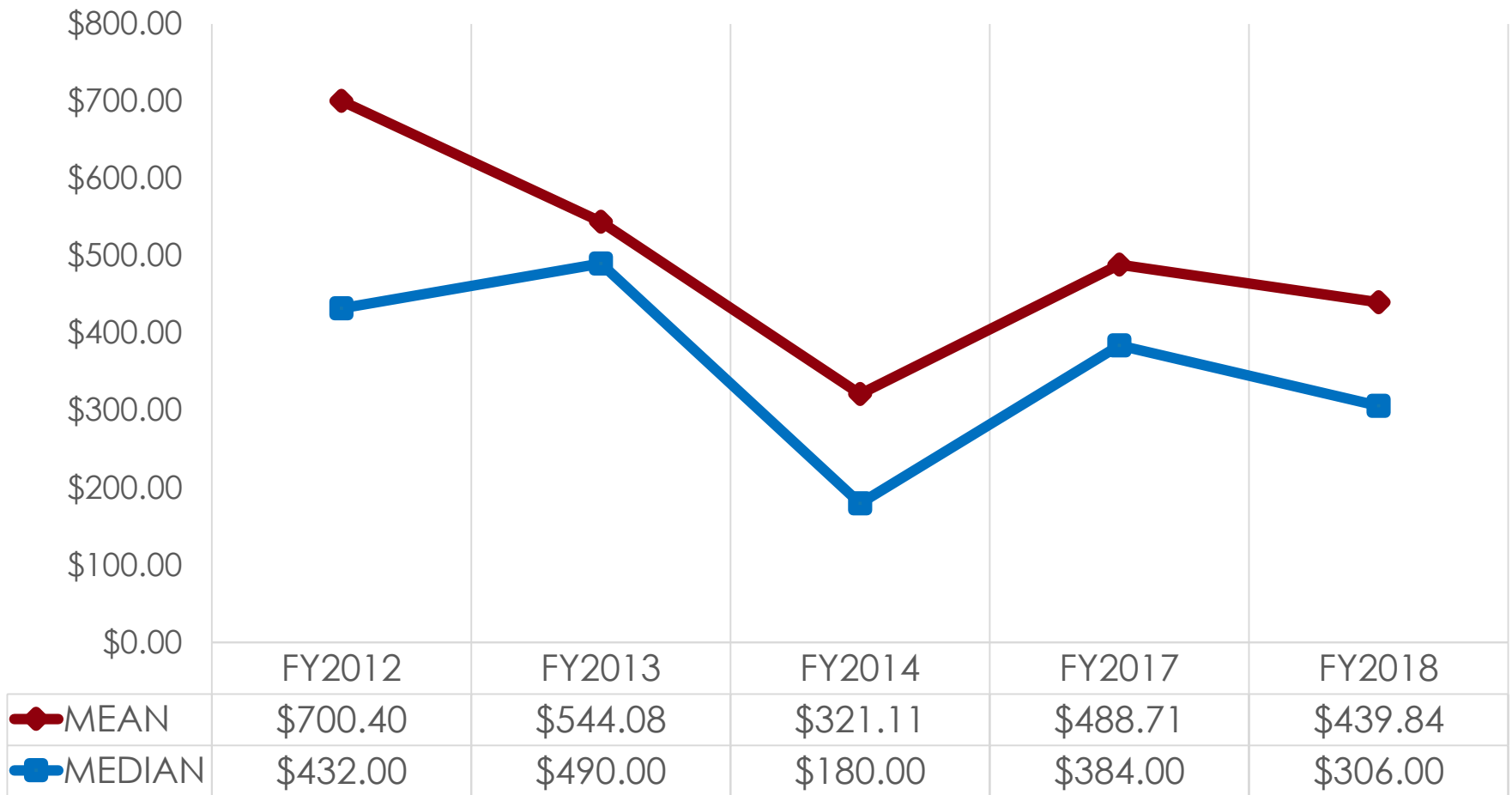
Prepaid – Tracking

Ground Transportation - Guam



Prepaid – Tracking

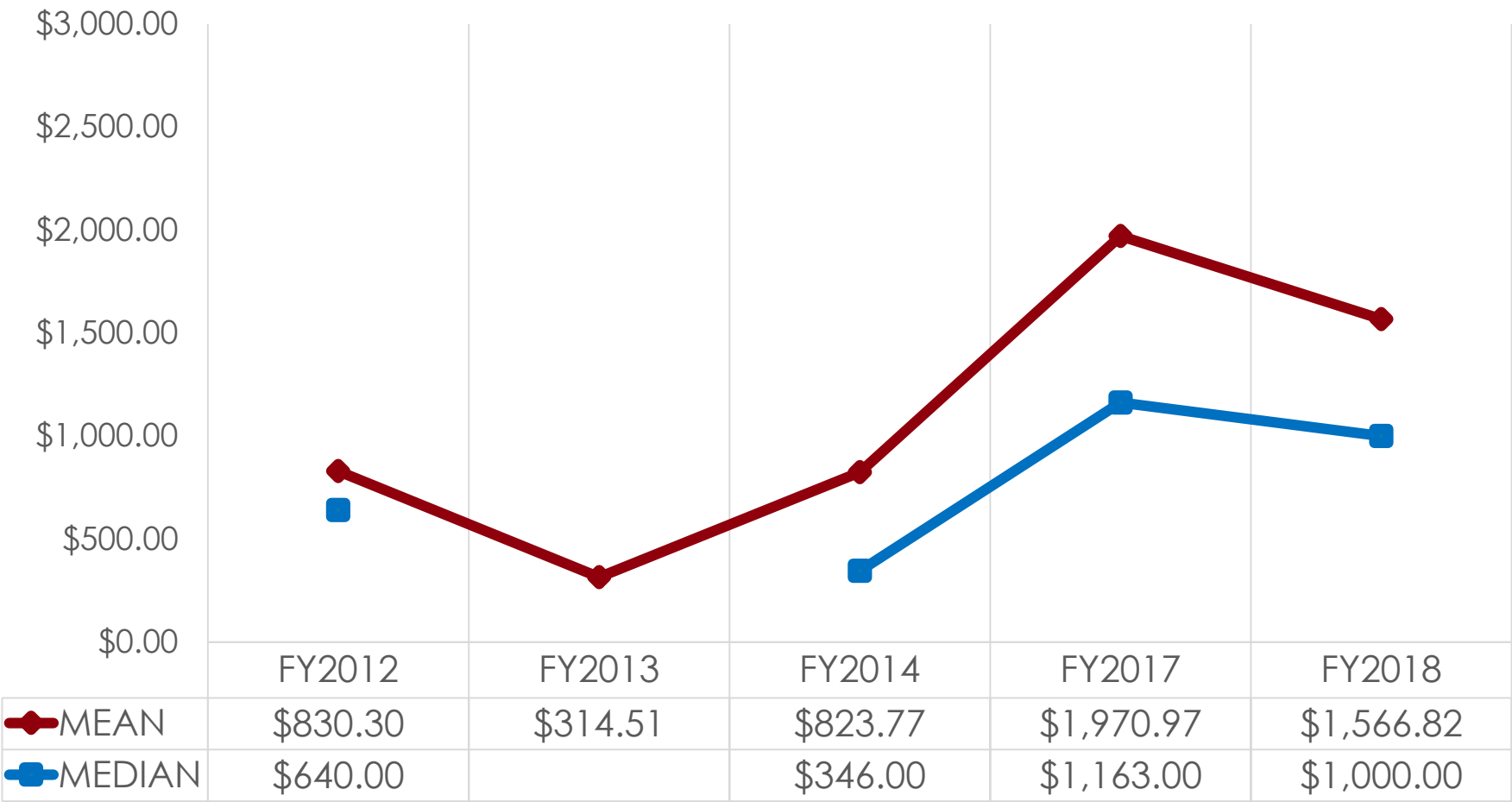
Optional tours/ Activities



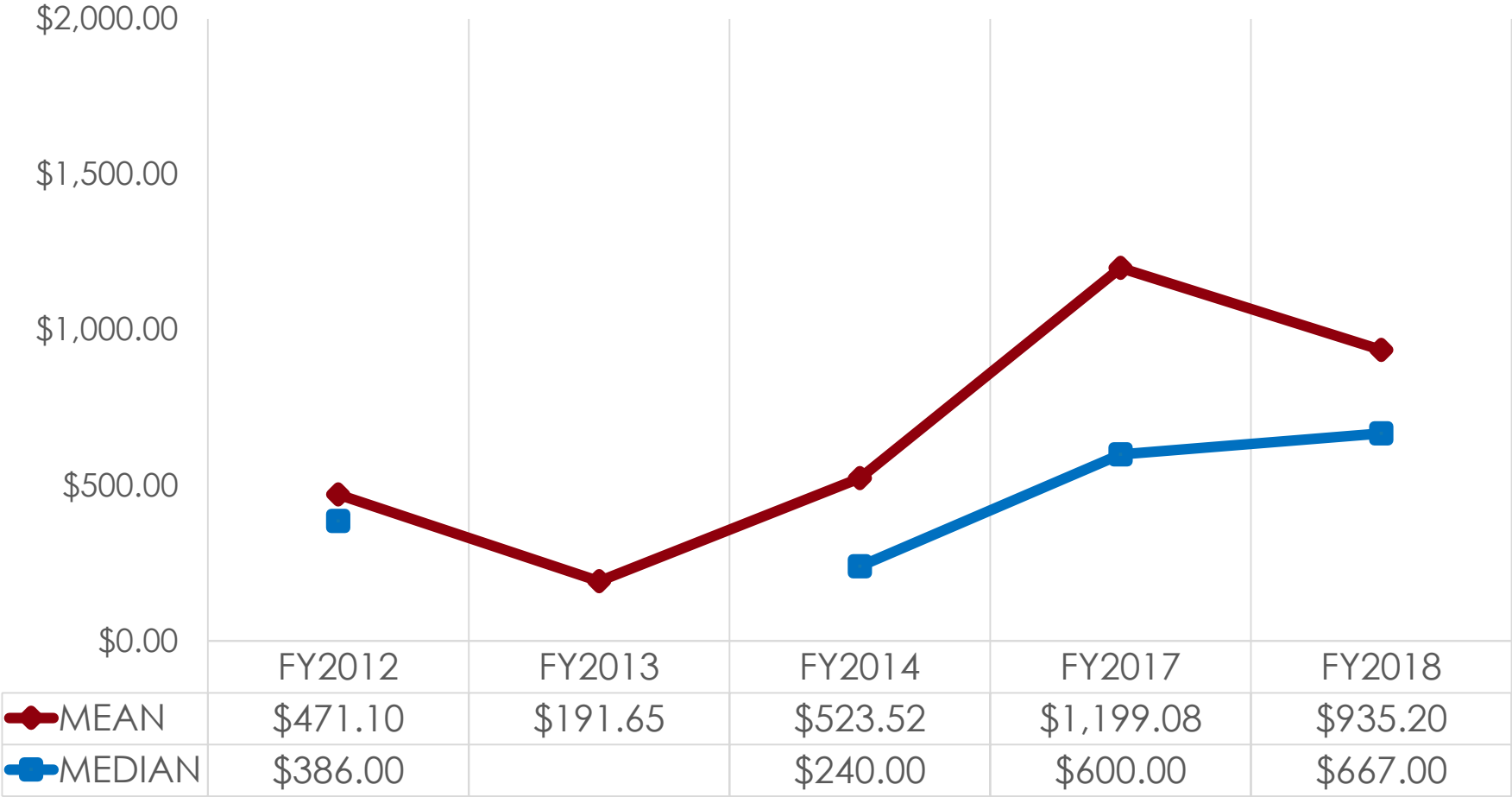
On-Island Expenditures

- \$1,566.82 = overall mean average on-island expense (for entire travel party size) by respondent
- \$935.20 = overall mean average per person prepaid expenditures

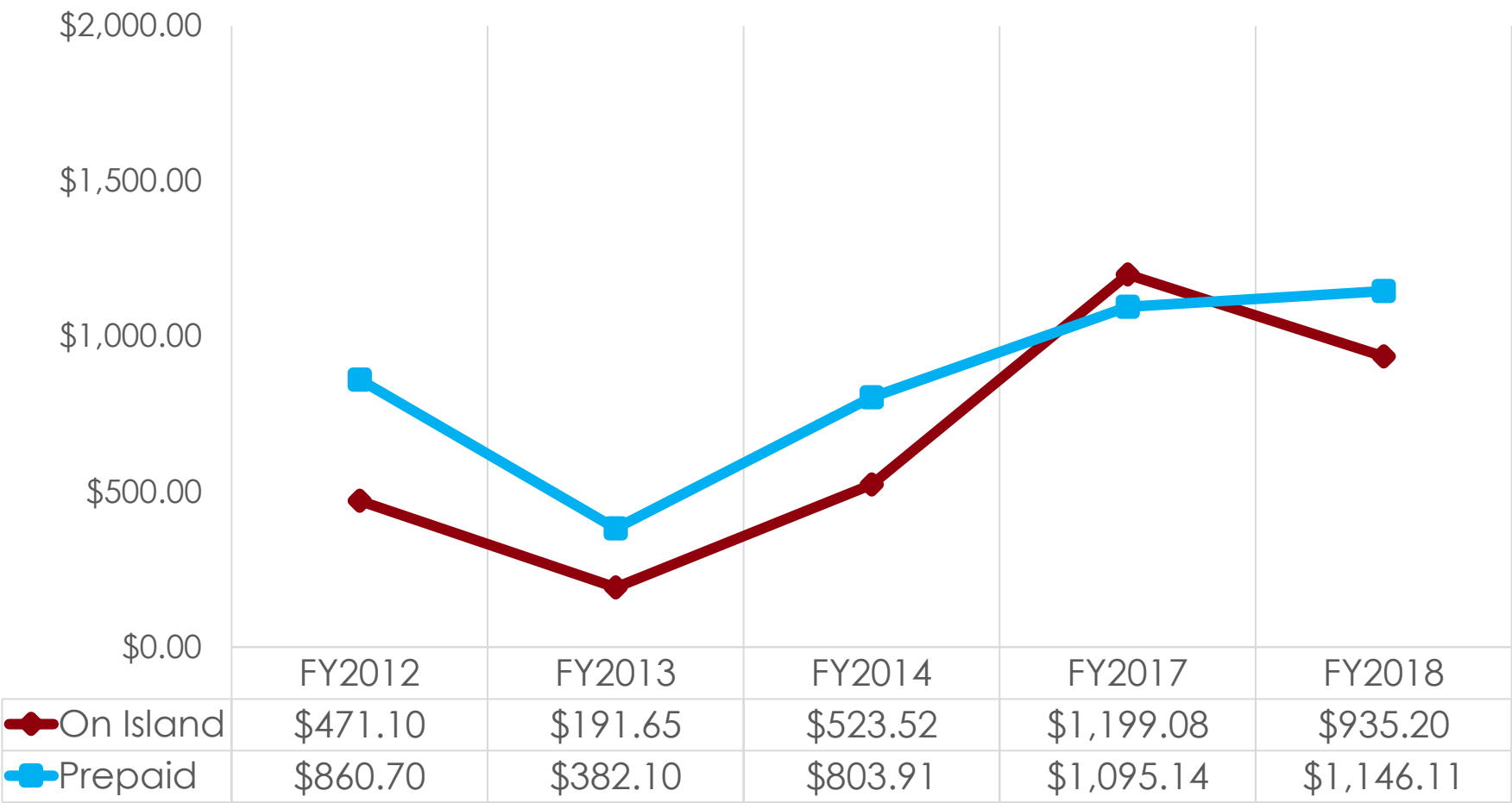
On-Island Entire Travel Party – Tracking



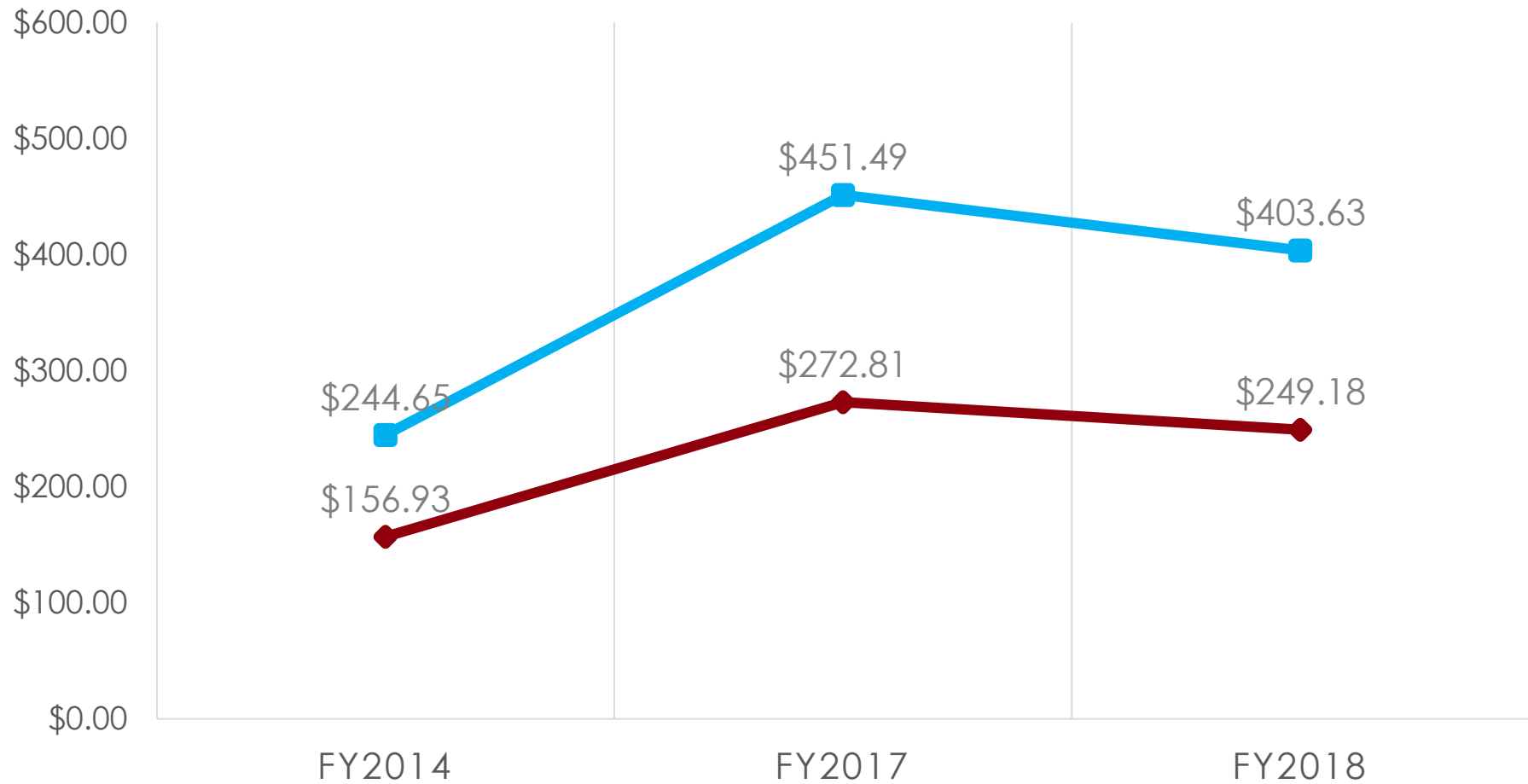
On-Island Per Person – Tracking



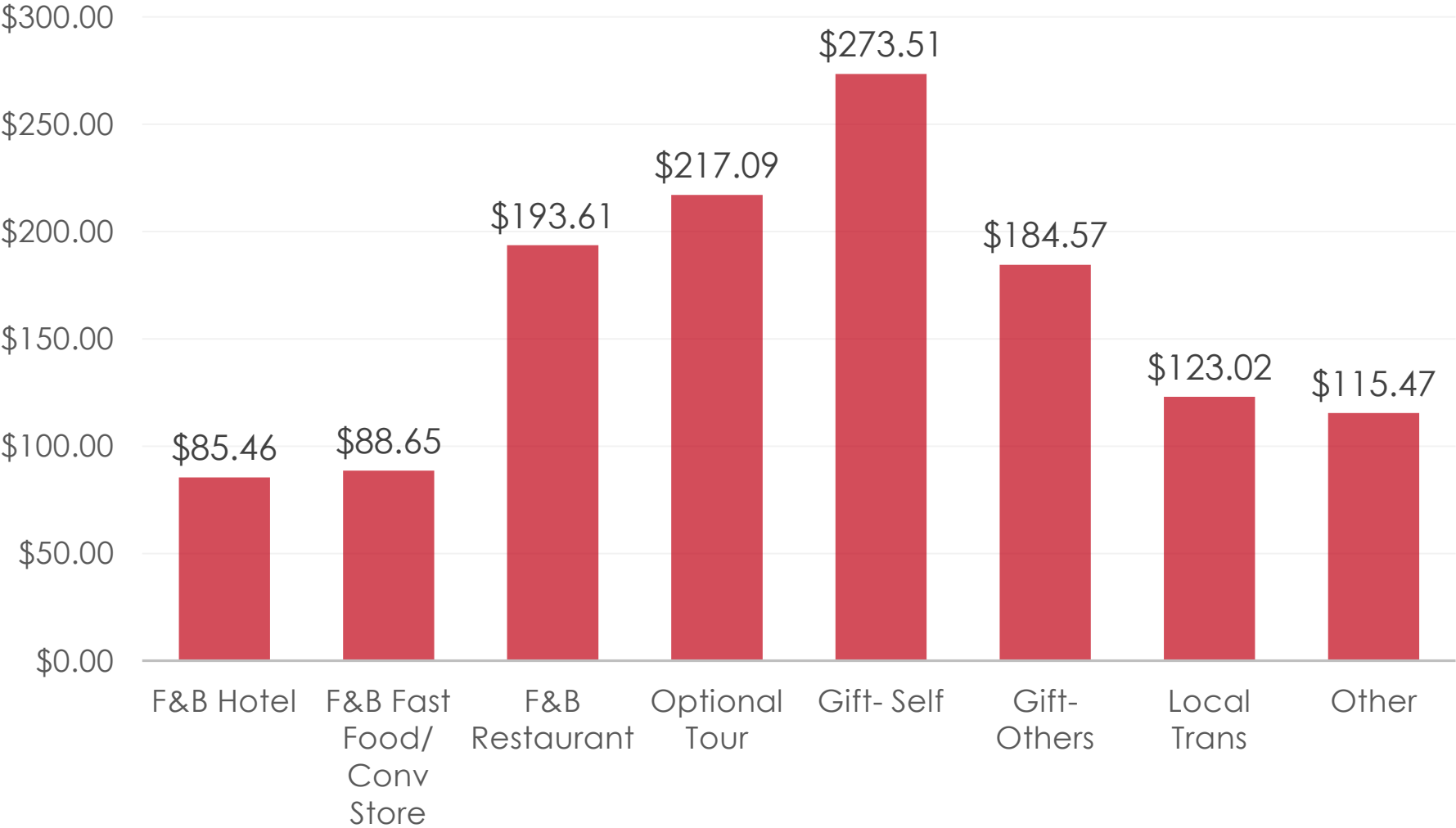
Per Person MEAN expenditures – Tracking On-Island/ Prepaid



On-Island Per Day Spending – Tracking Mean

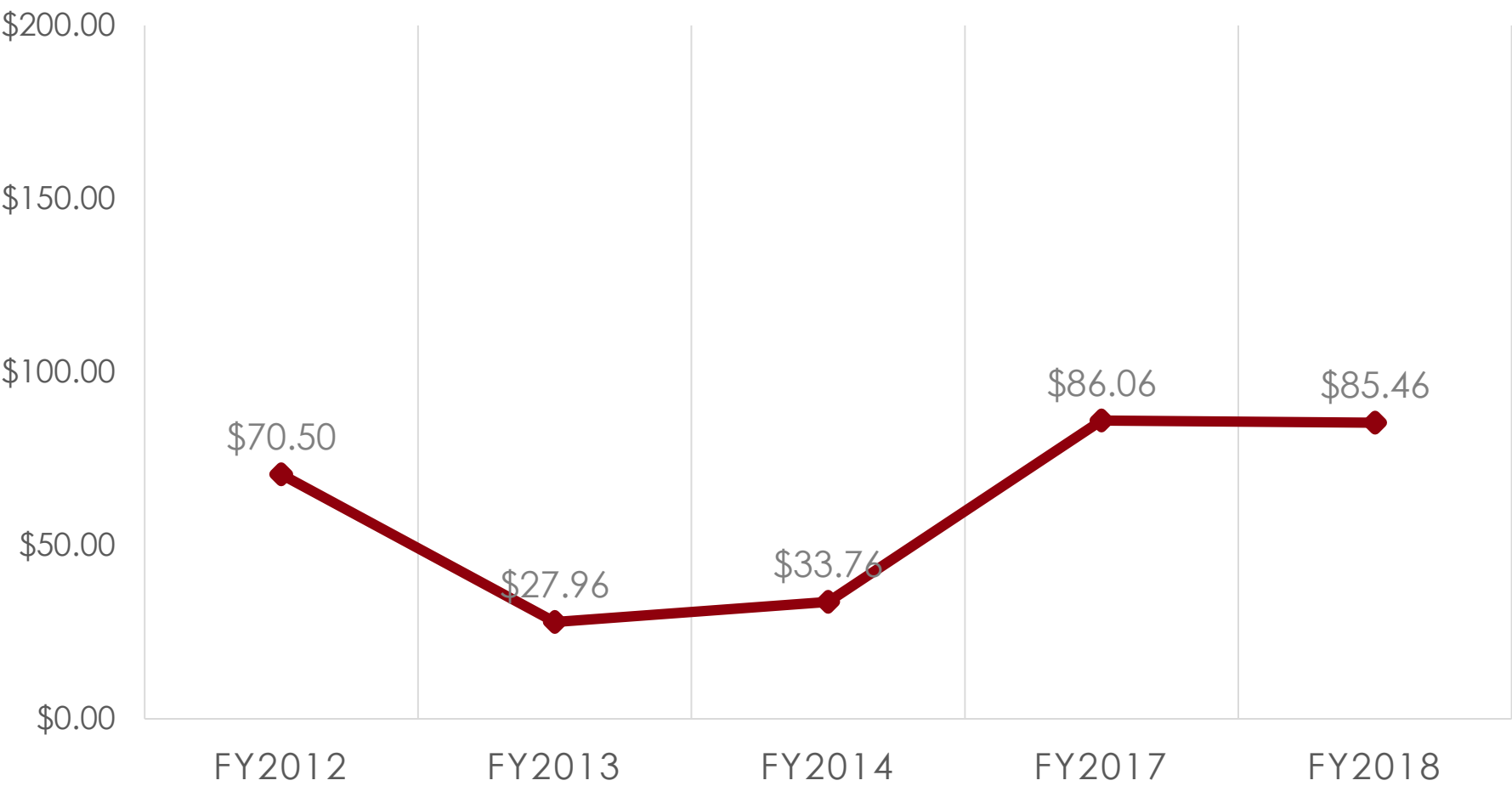


On-Island Expenses by Category – Mean Entire Travel Party



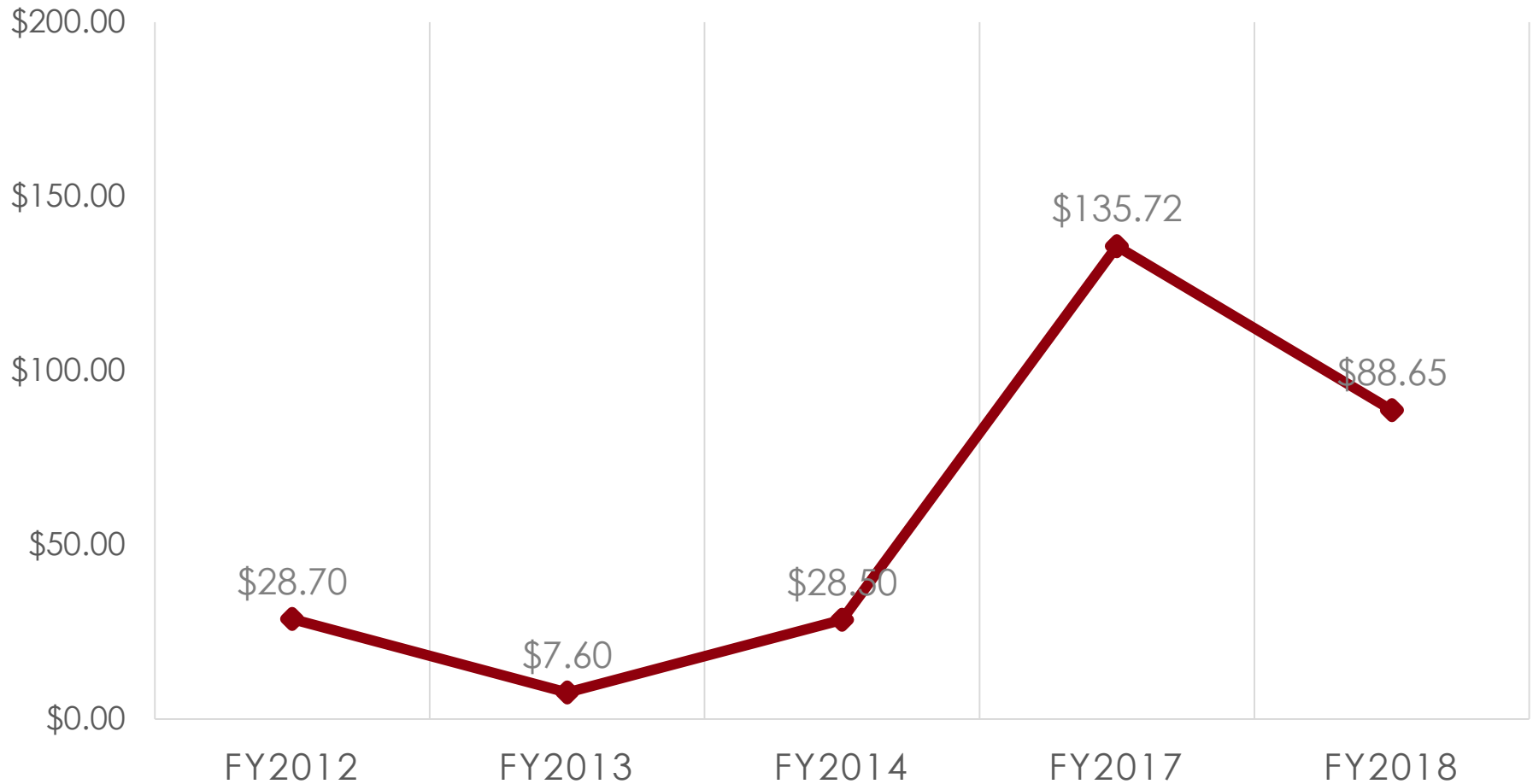
On-Island – Tracking

Food & Beverage - Hotel



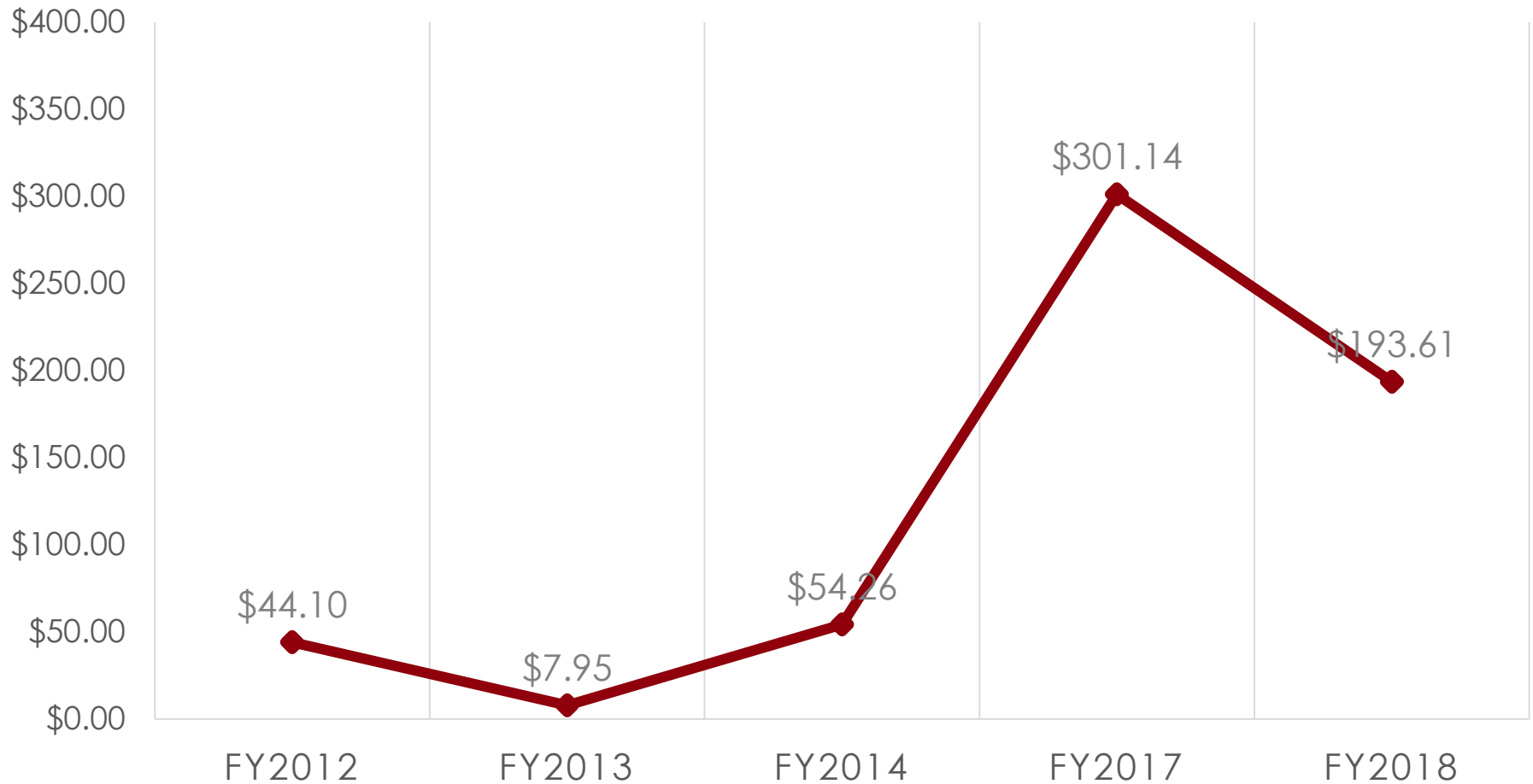
On-Island – Tracking

Food & Beverage – Fast Food/ Convenience Store



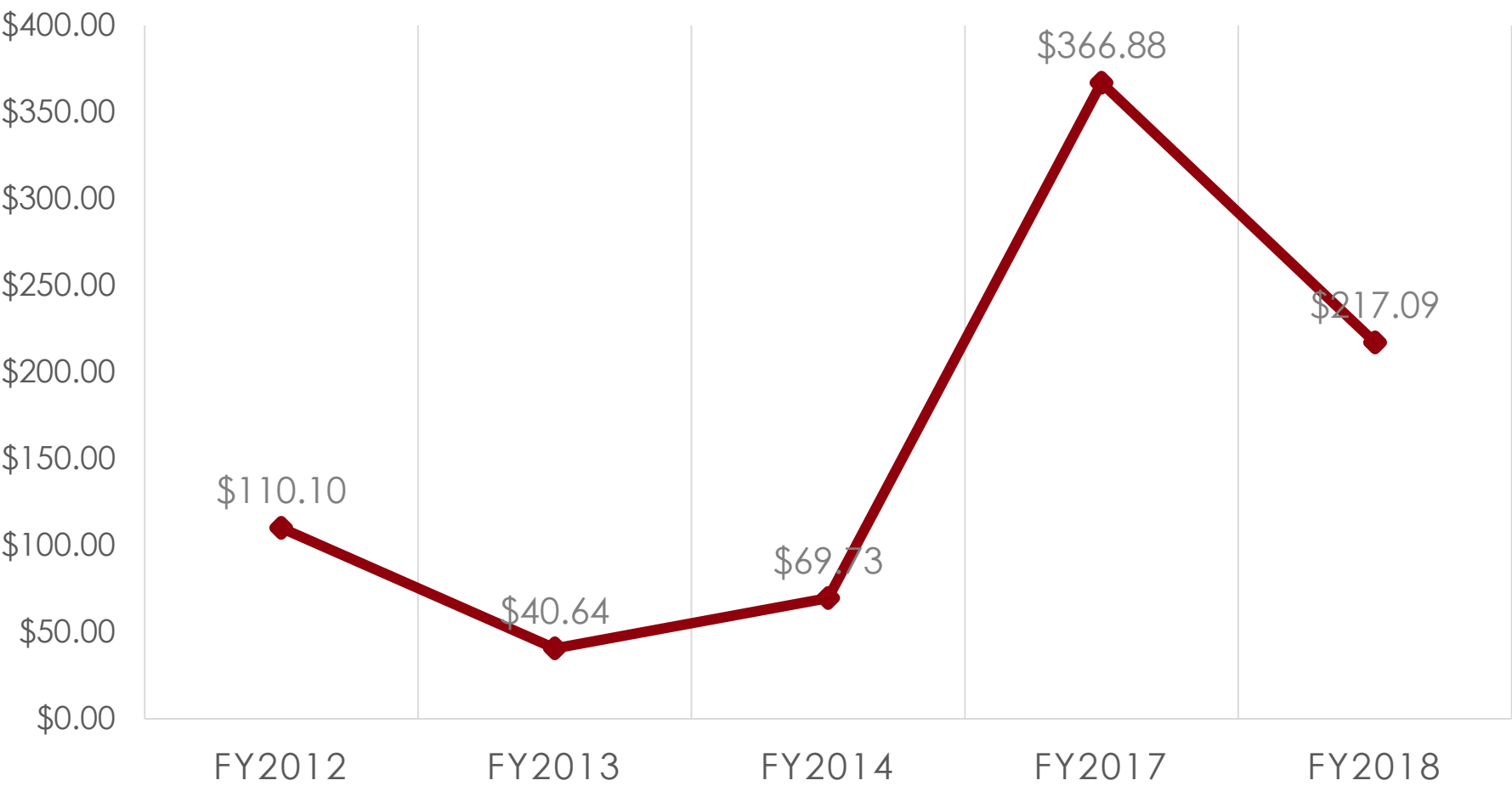
On-Island – Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



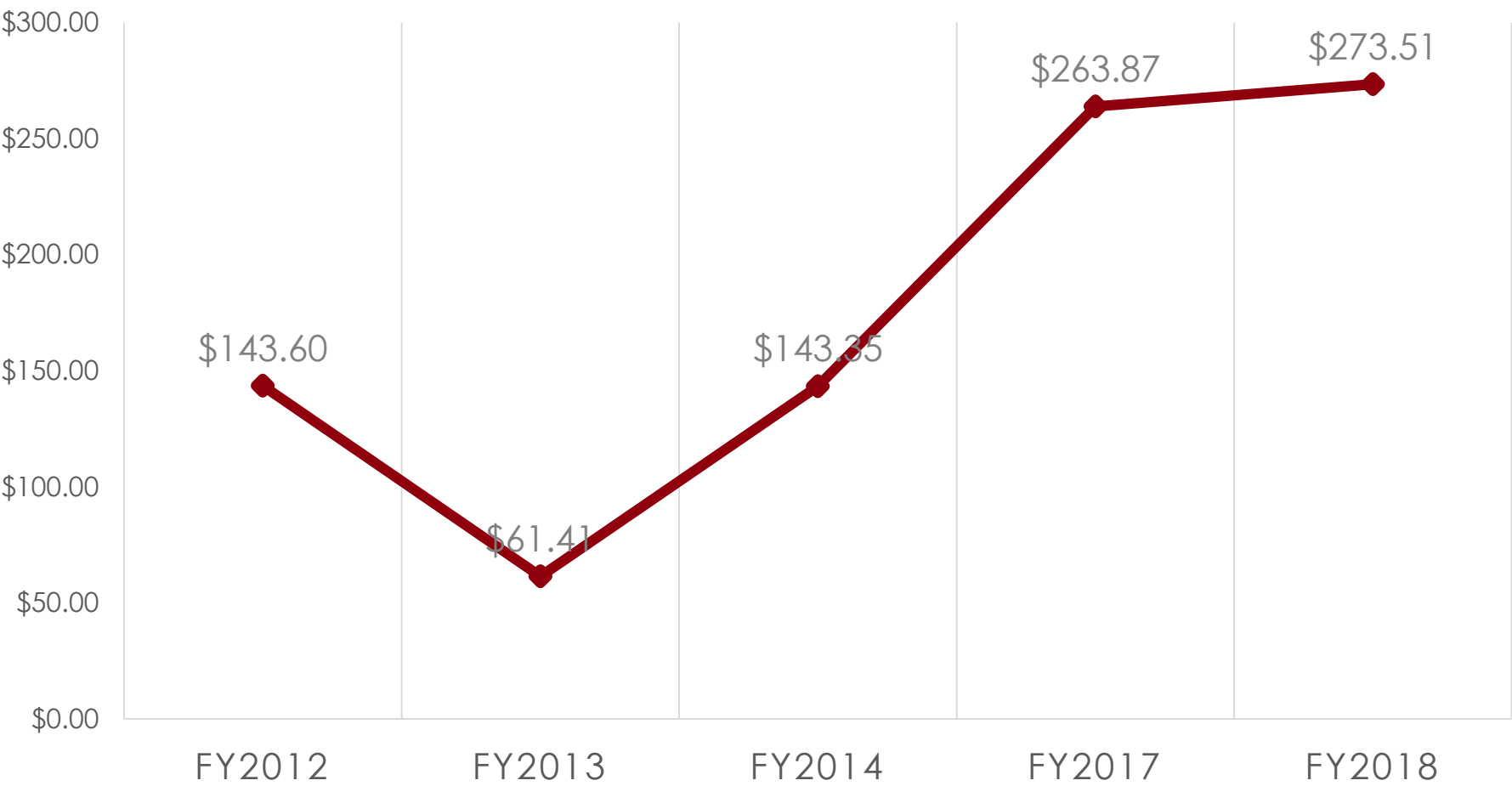
On-Island – Tracking

Optional tour/ Activities



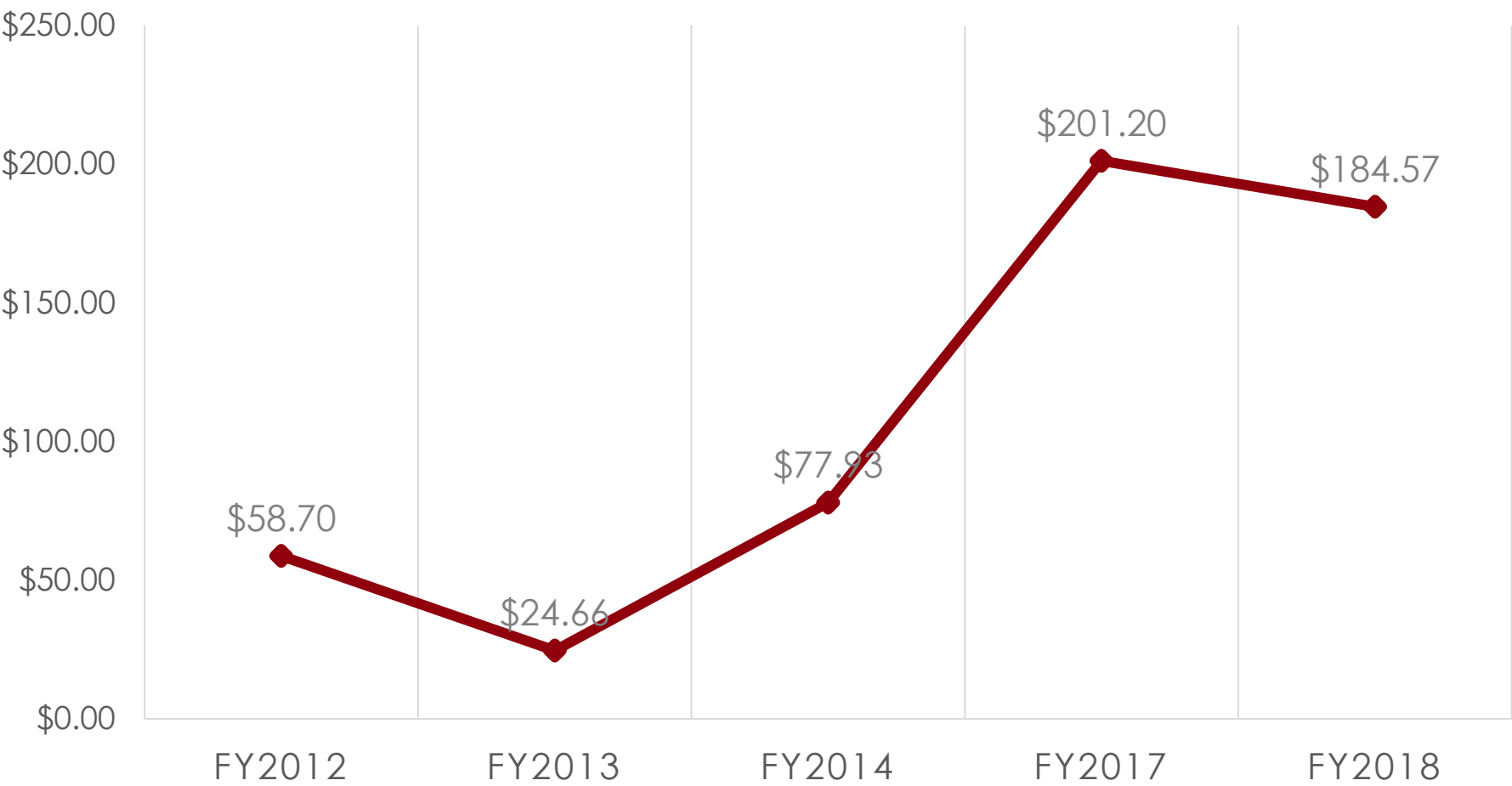
On-Island – Tracking

Gift/ Souvenir – Self/ Companion

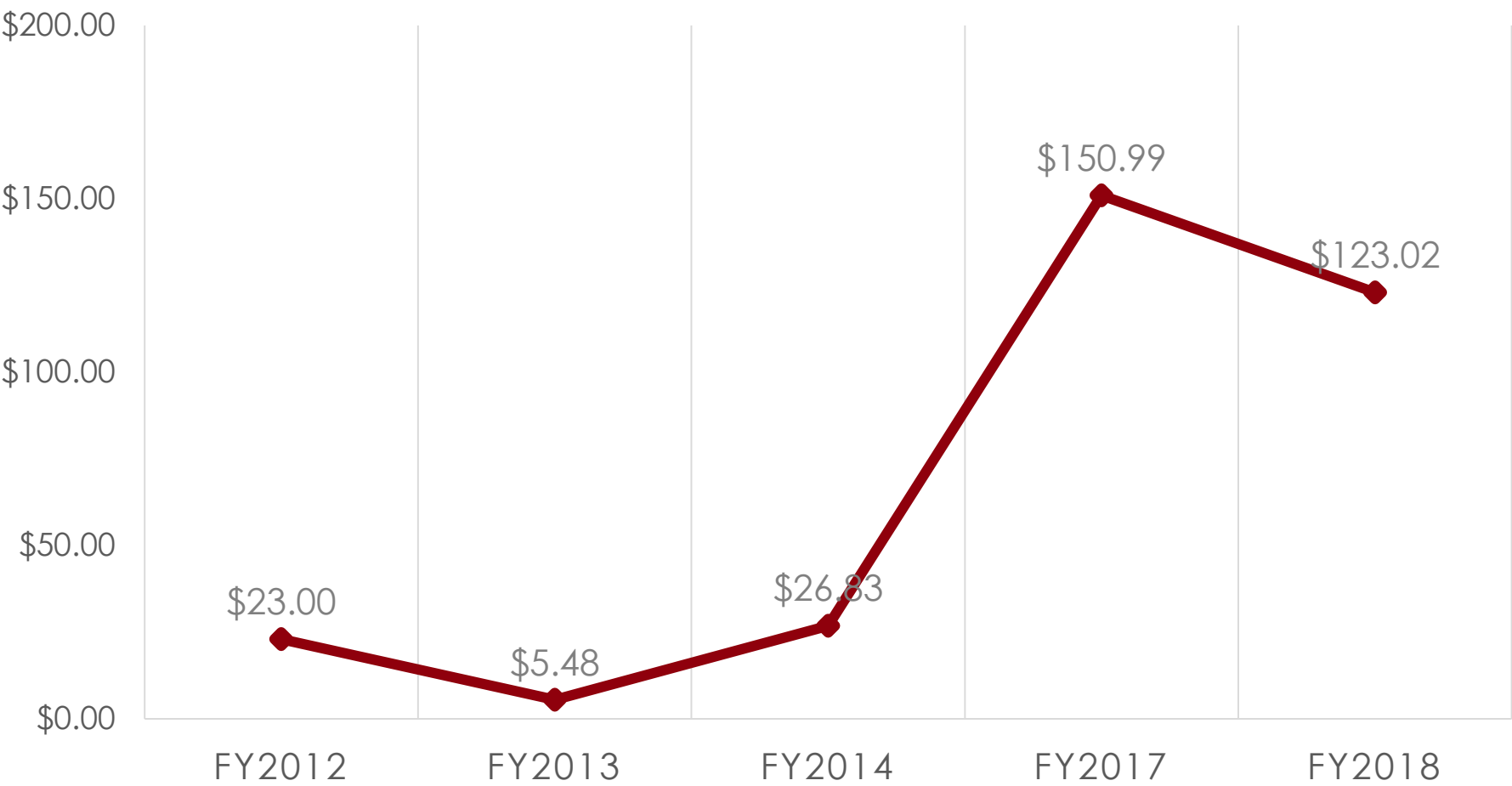


On-Island – Tracking

Gift/ Souvenir – Friends/ Family

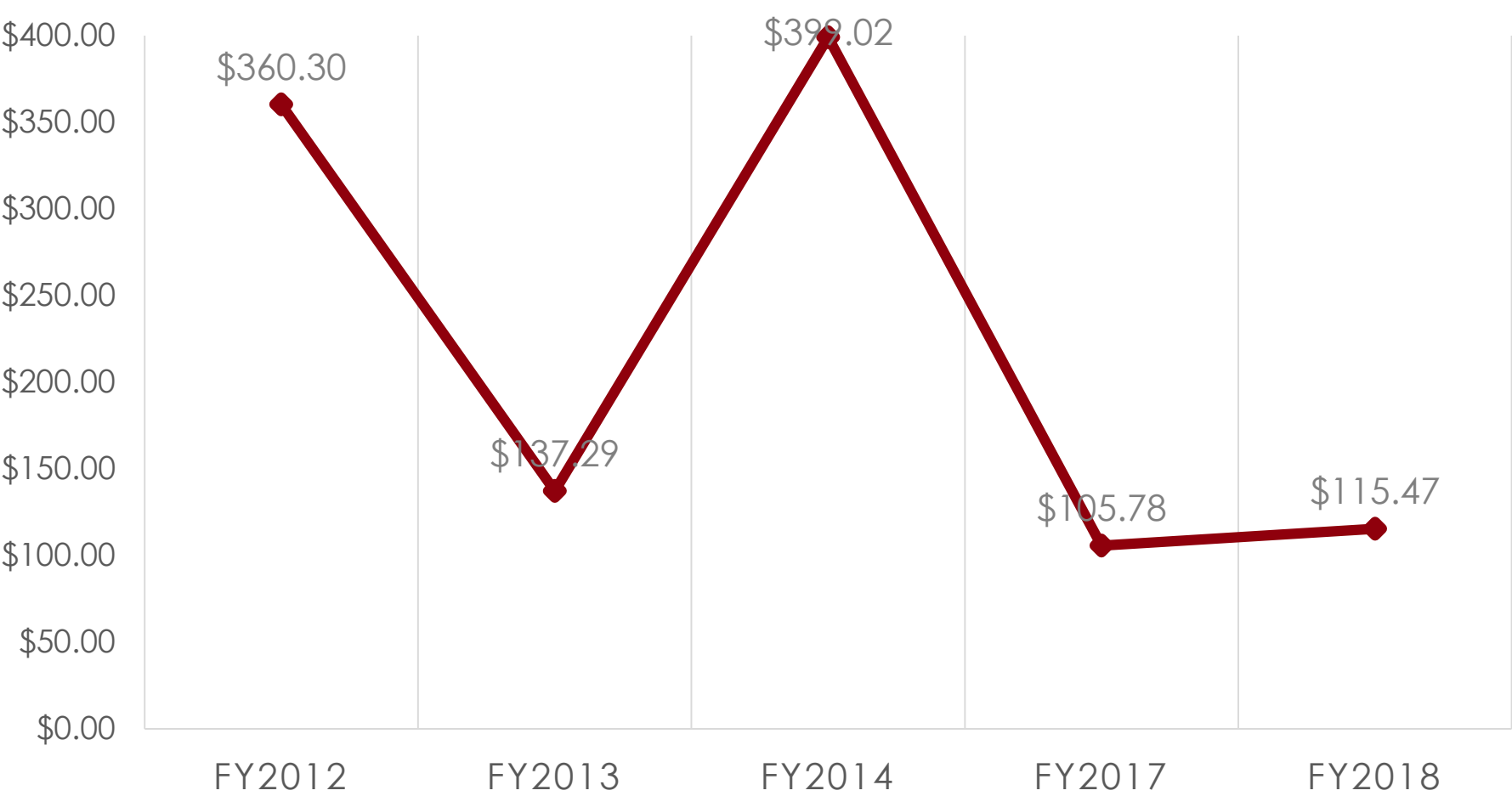


On-Island – Tracking Local Transportation



On-Island – Tracking

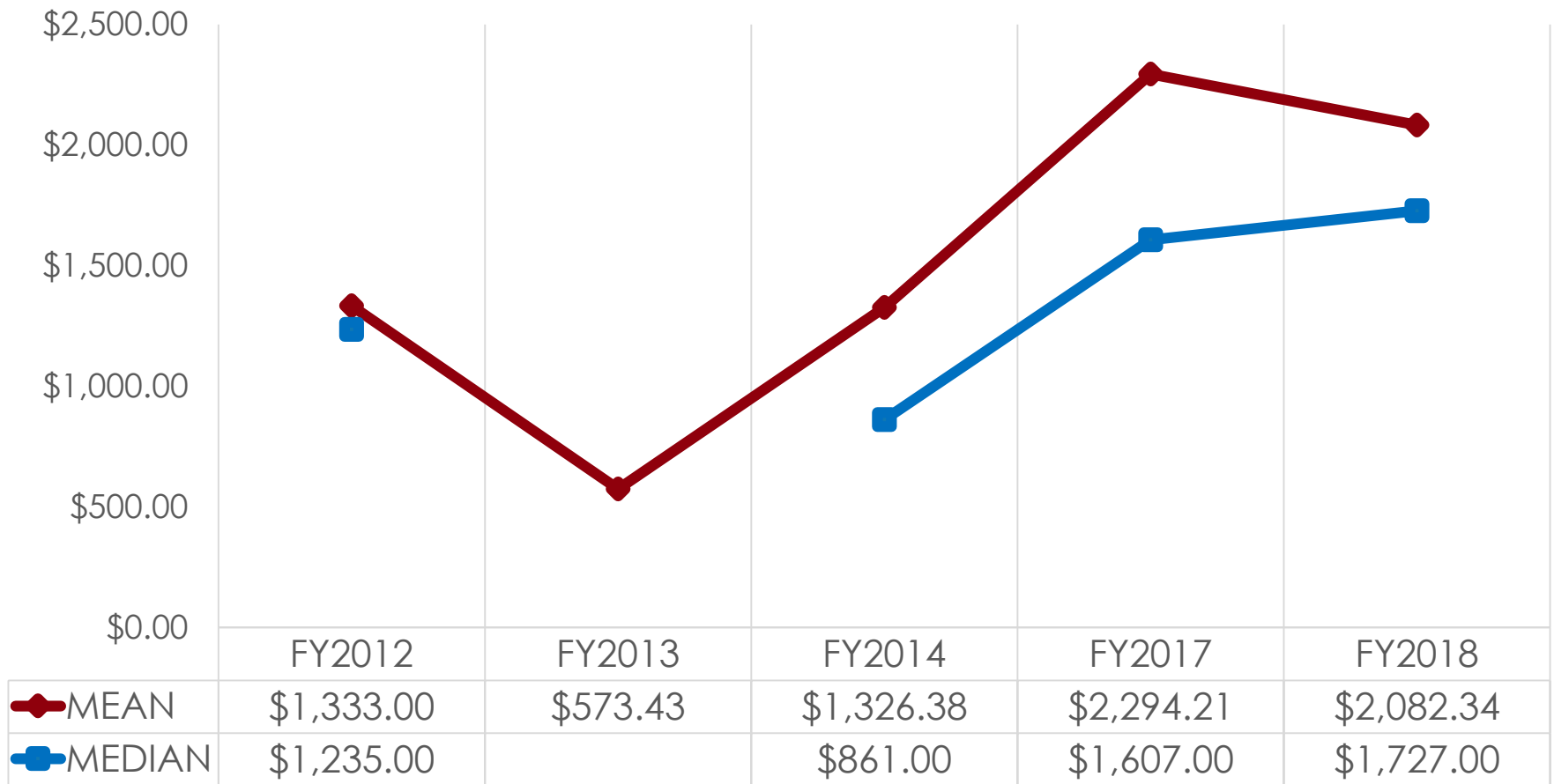
Other Not Included



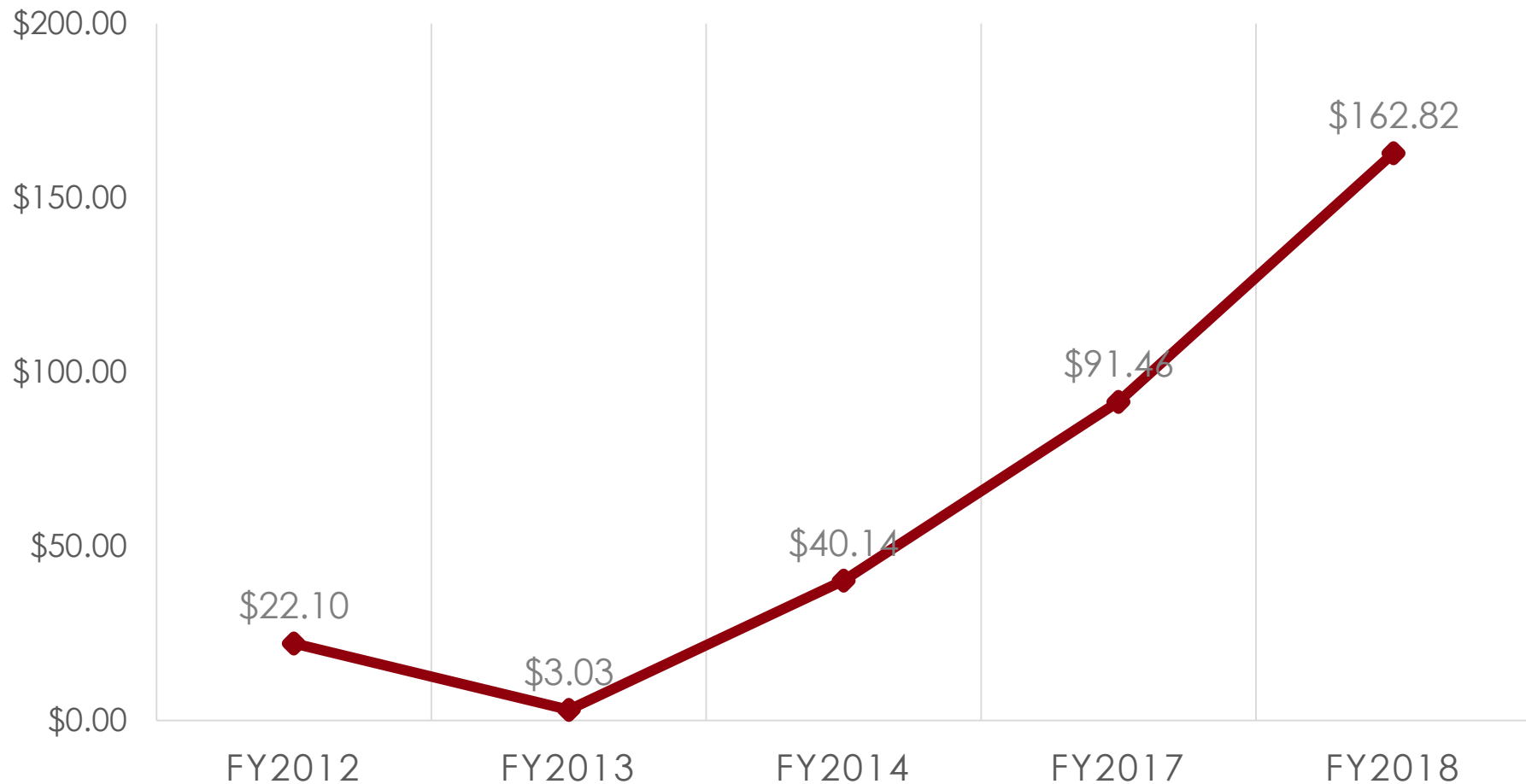
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$2,082.34 = overall mean average prepaid expense by respondent/ Per Person

TOTAL Per Person Expenditures – Tracking



GUAM AIRPORT EXPENDITURE – Tracking

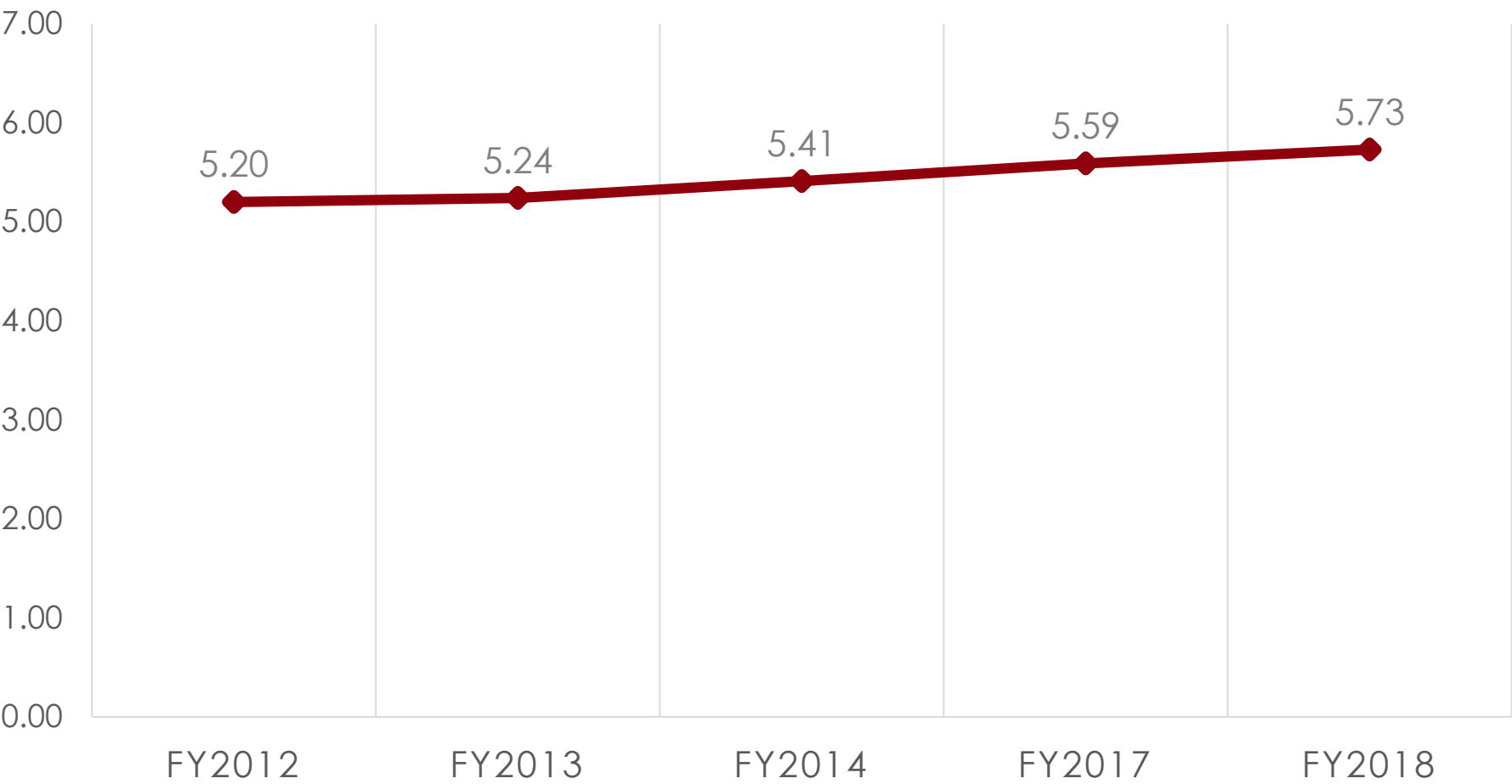


SECTION 4

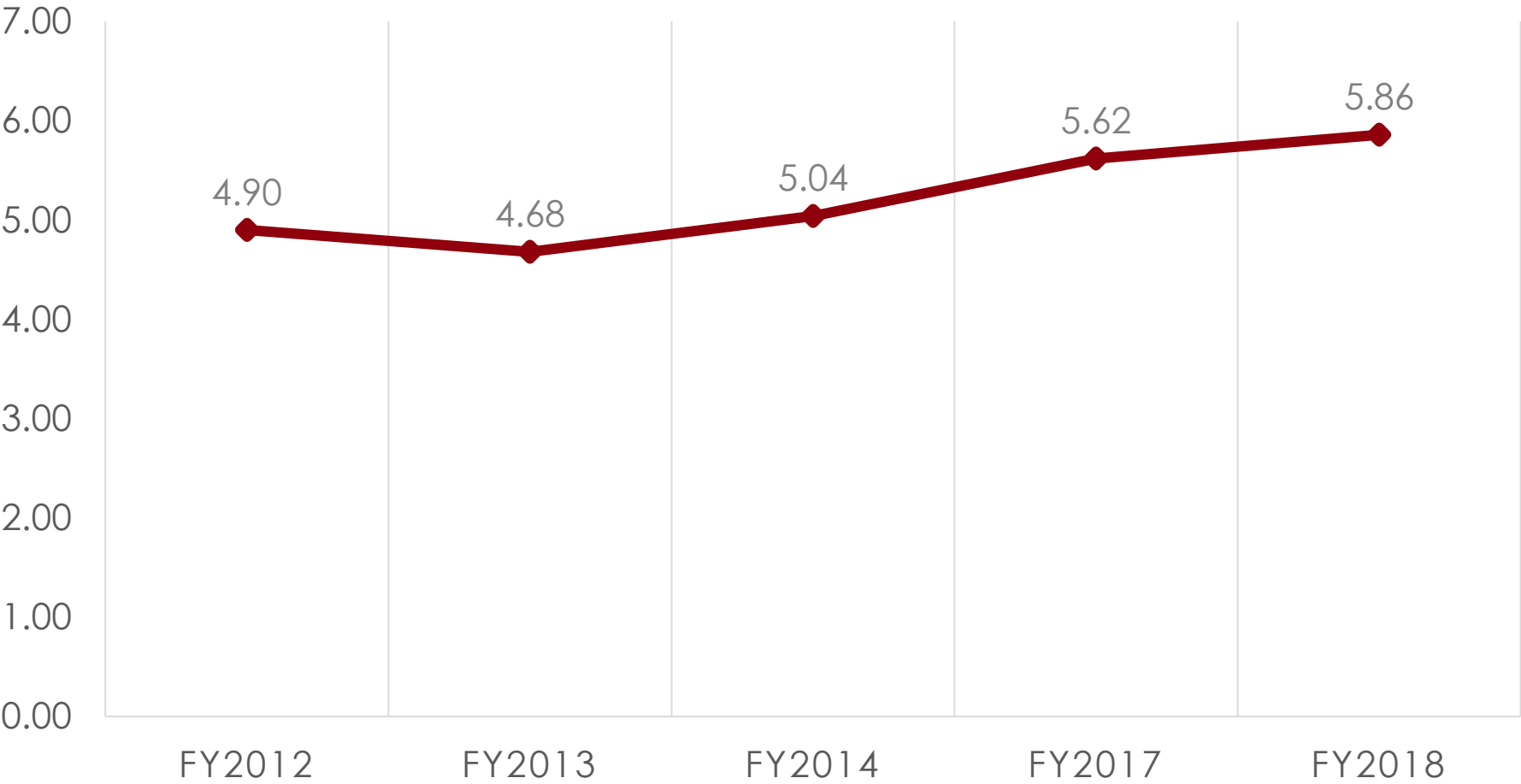
VISITOR SATISFACTION

BEHAVIOR

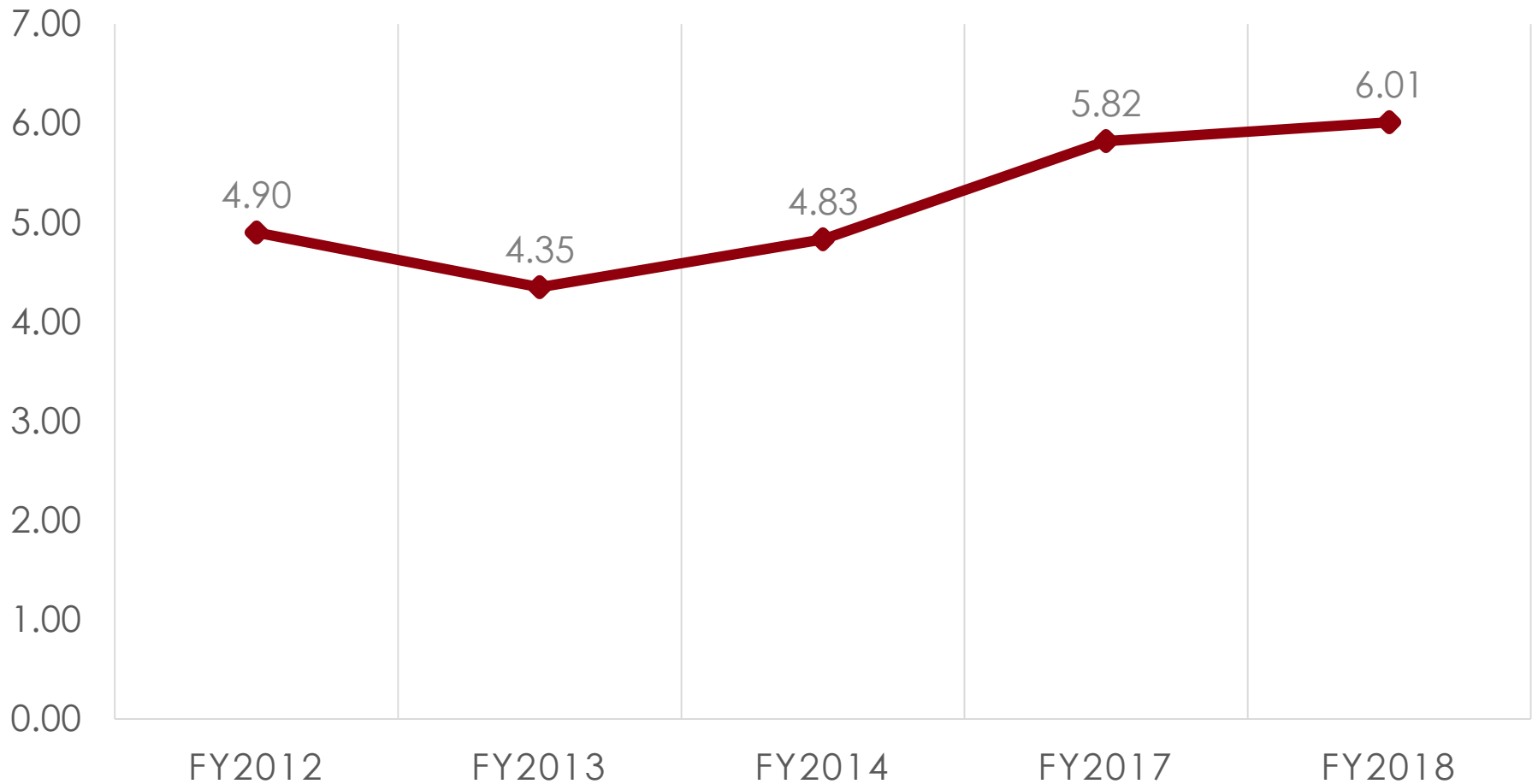
OVERALL SATISFACTION



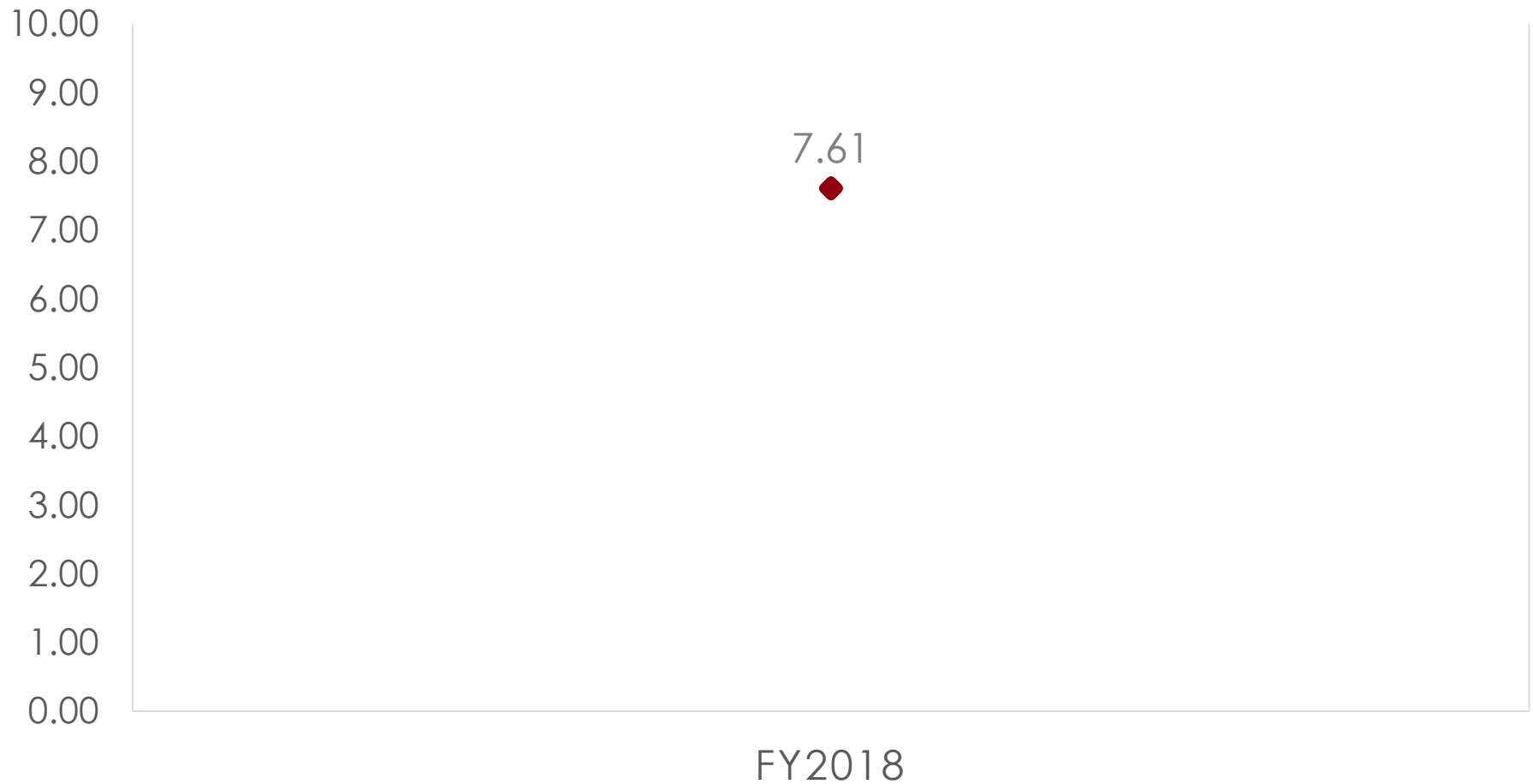
Guam was better than expected



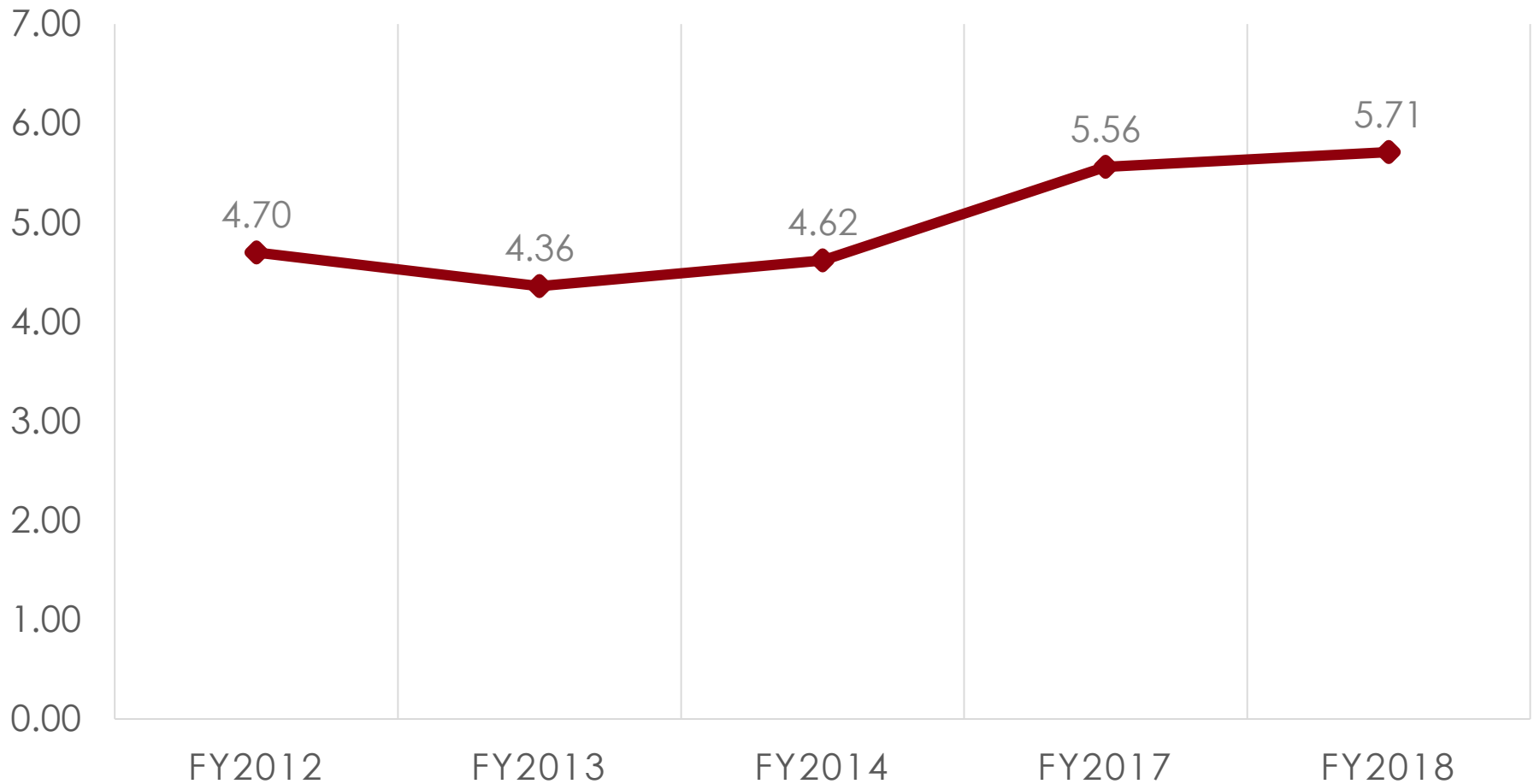
I had no communication problems



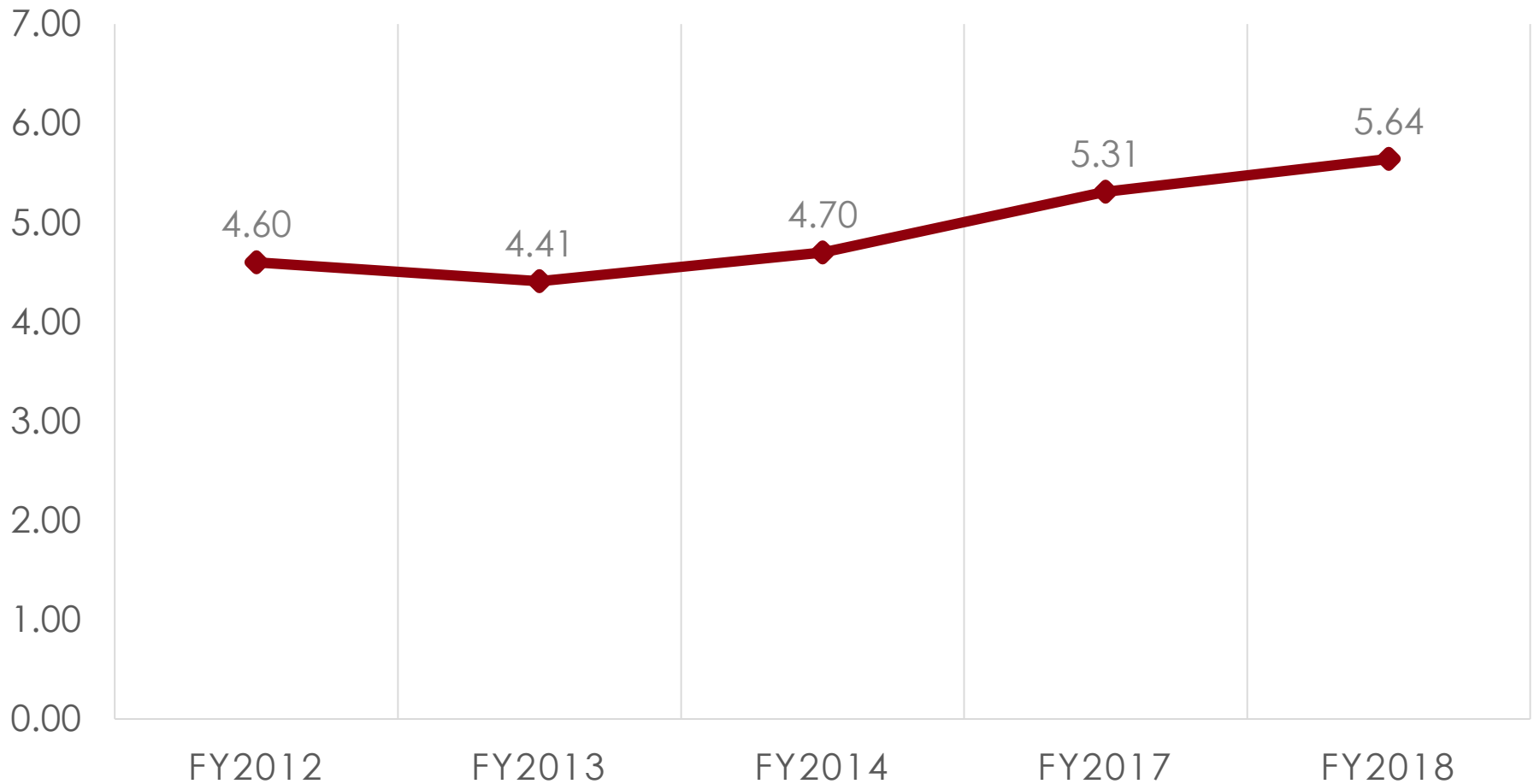
Recommend Guam - family & friends



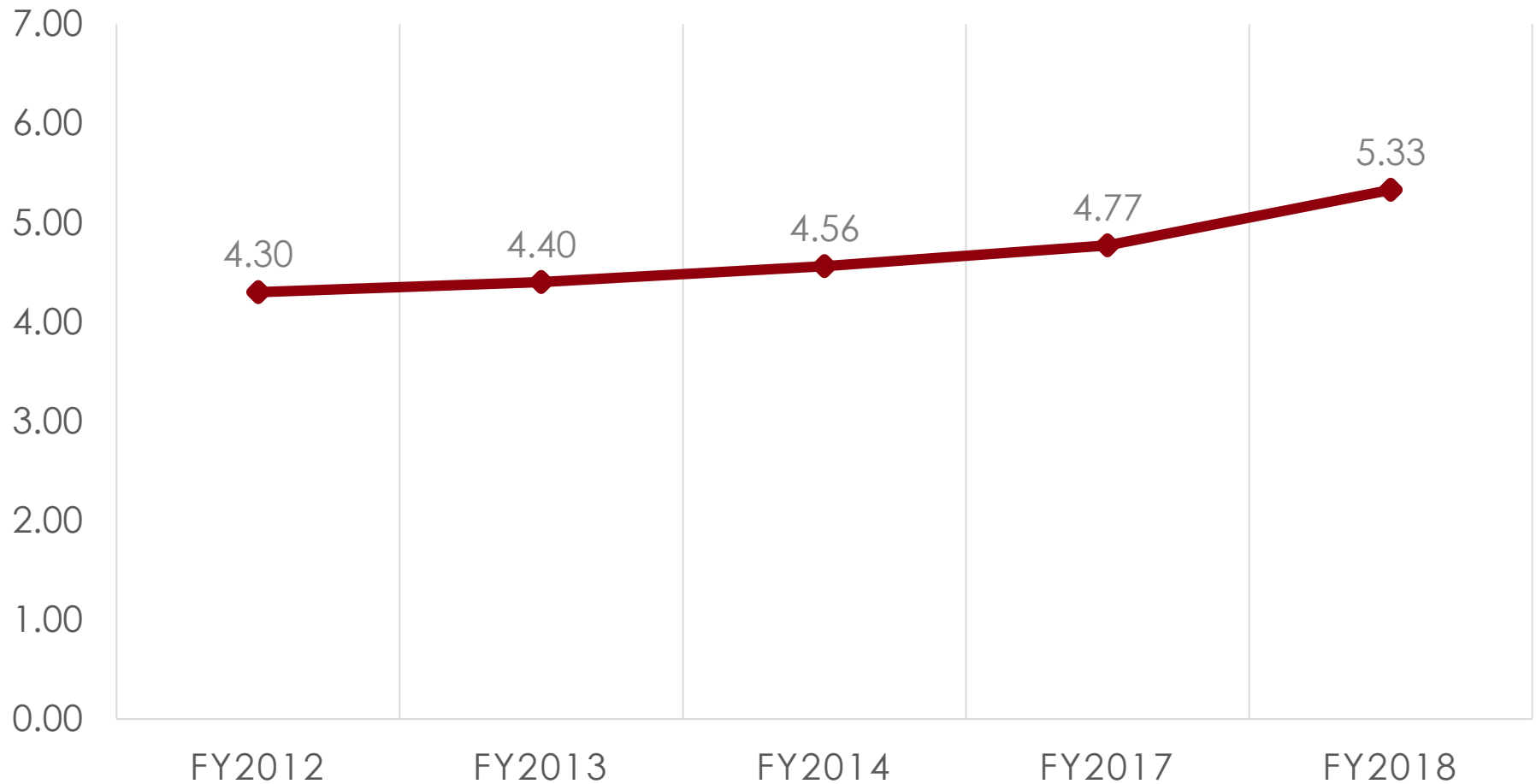
Sites on Guam were attractive



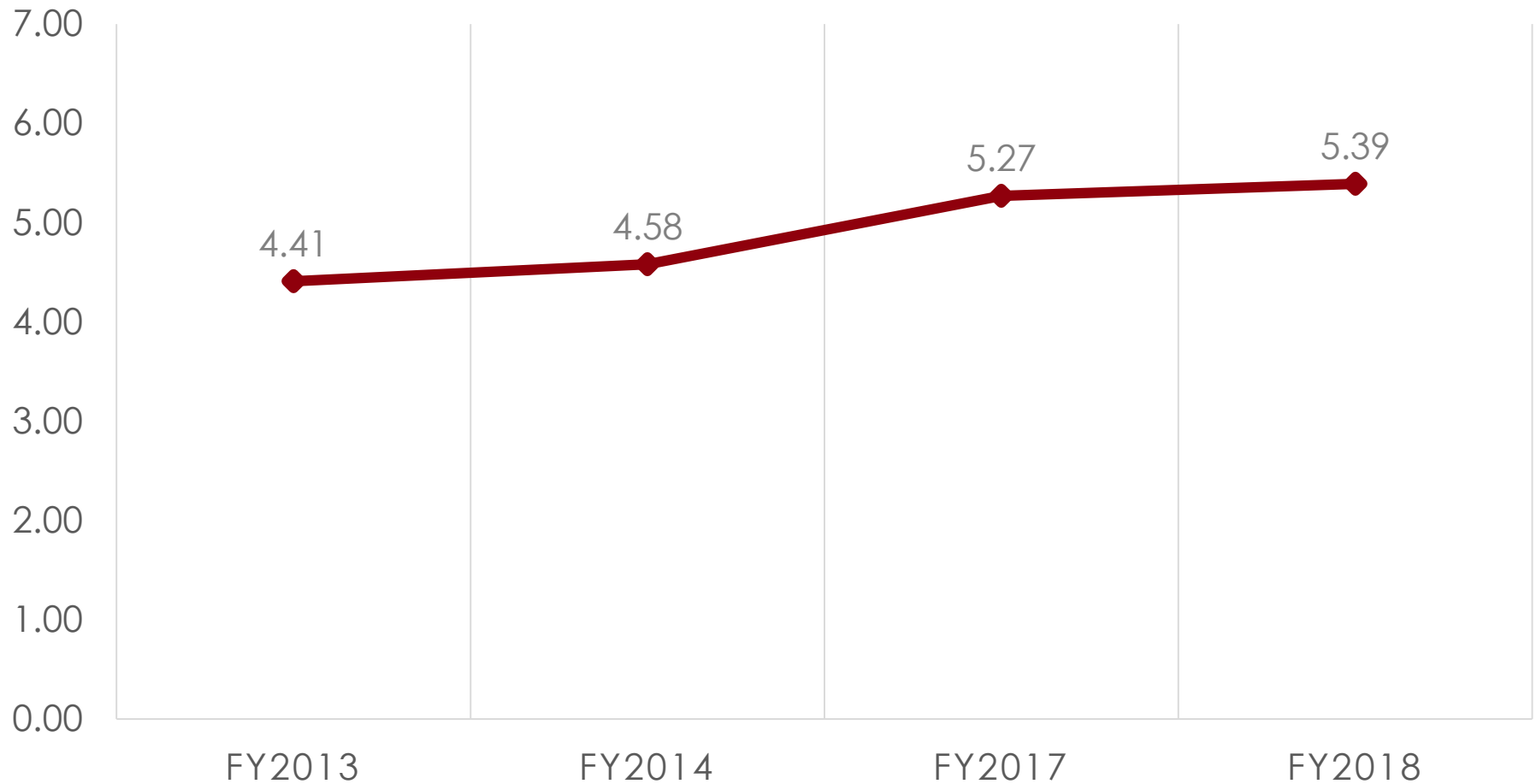
I plan to visit Guam again



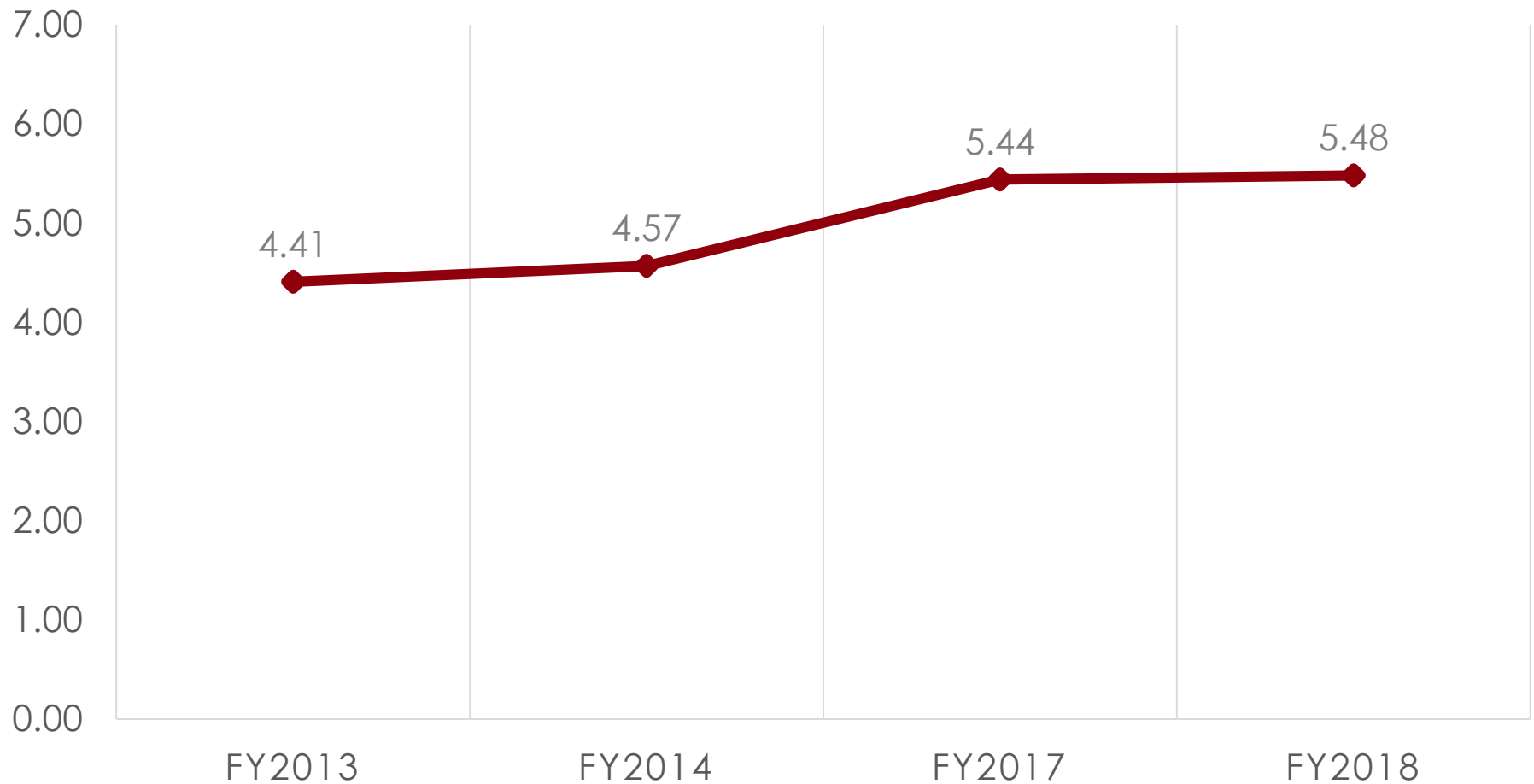
Not enough night time activities



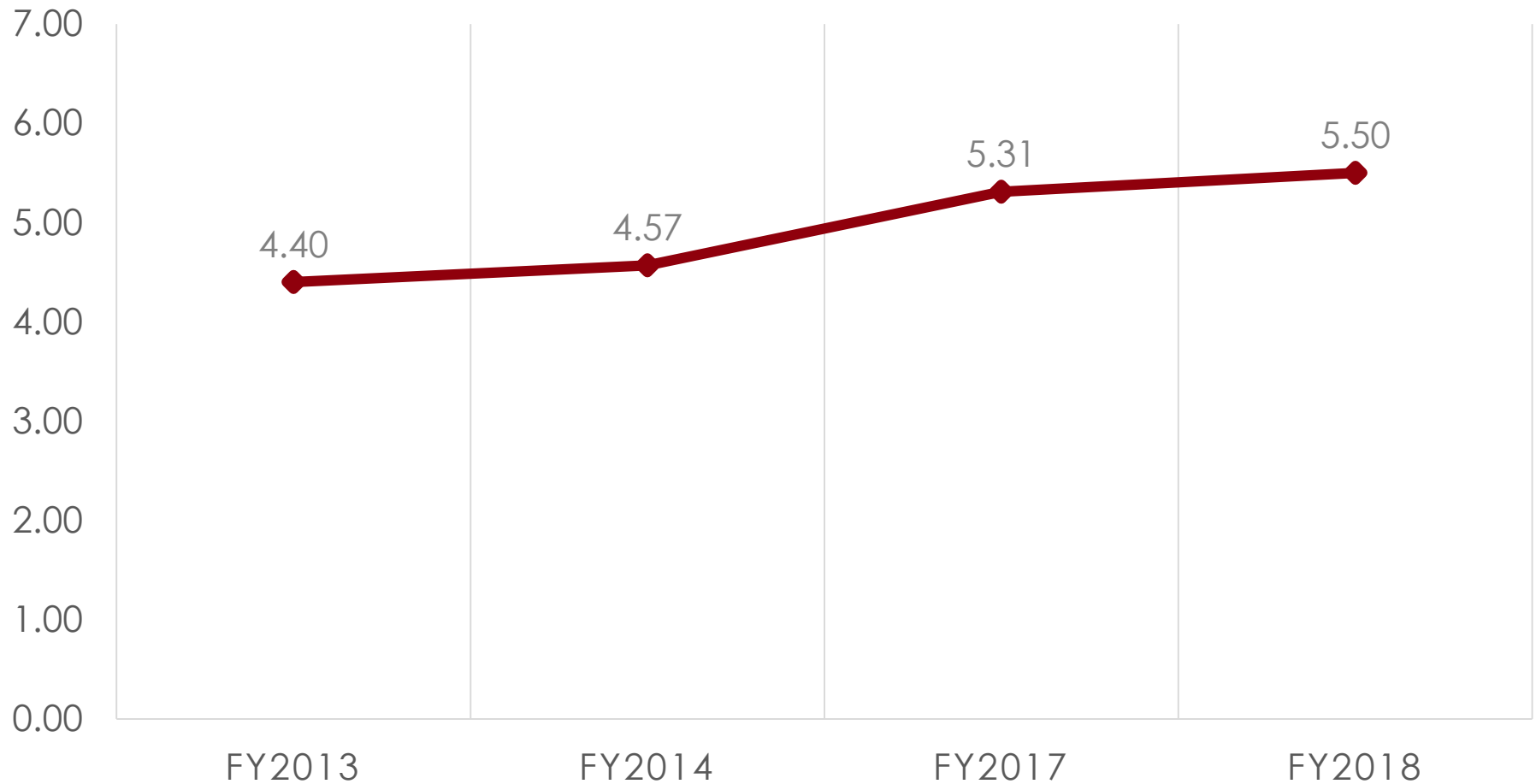
Tour guides were professional



Tour drivers were professional



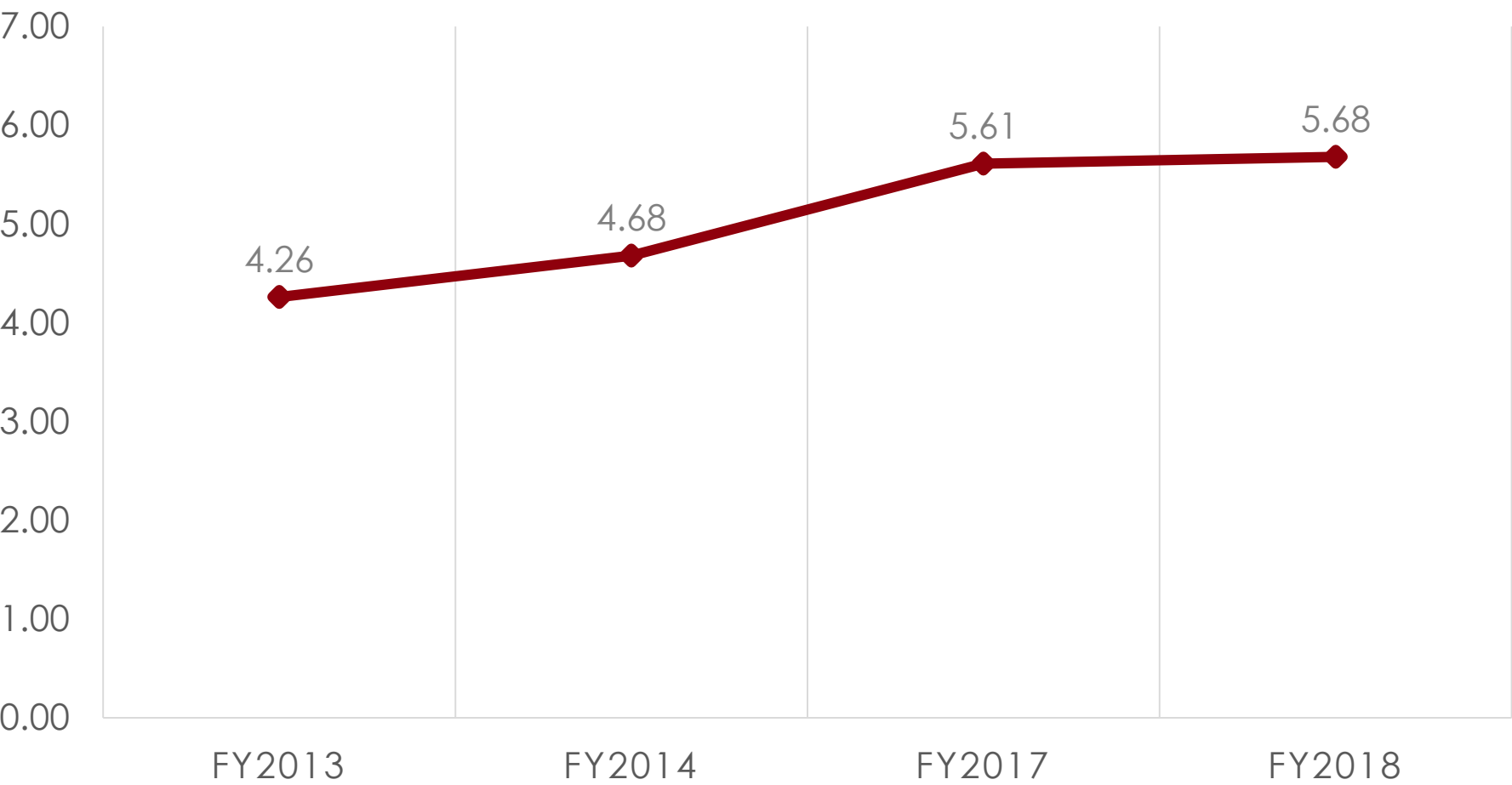
Taxi drivers were professional



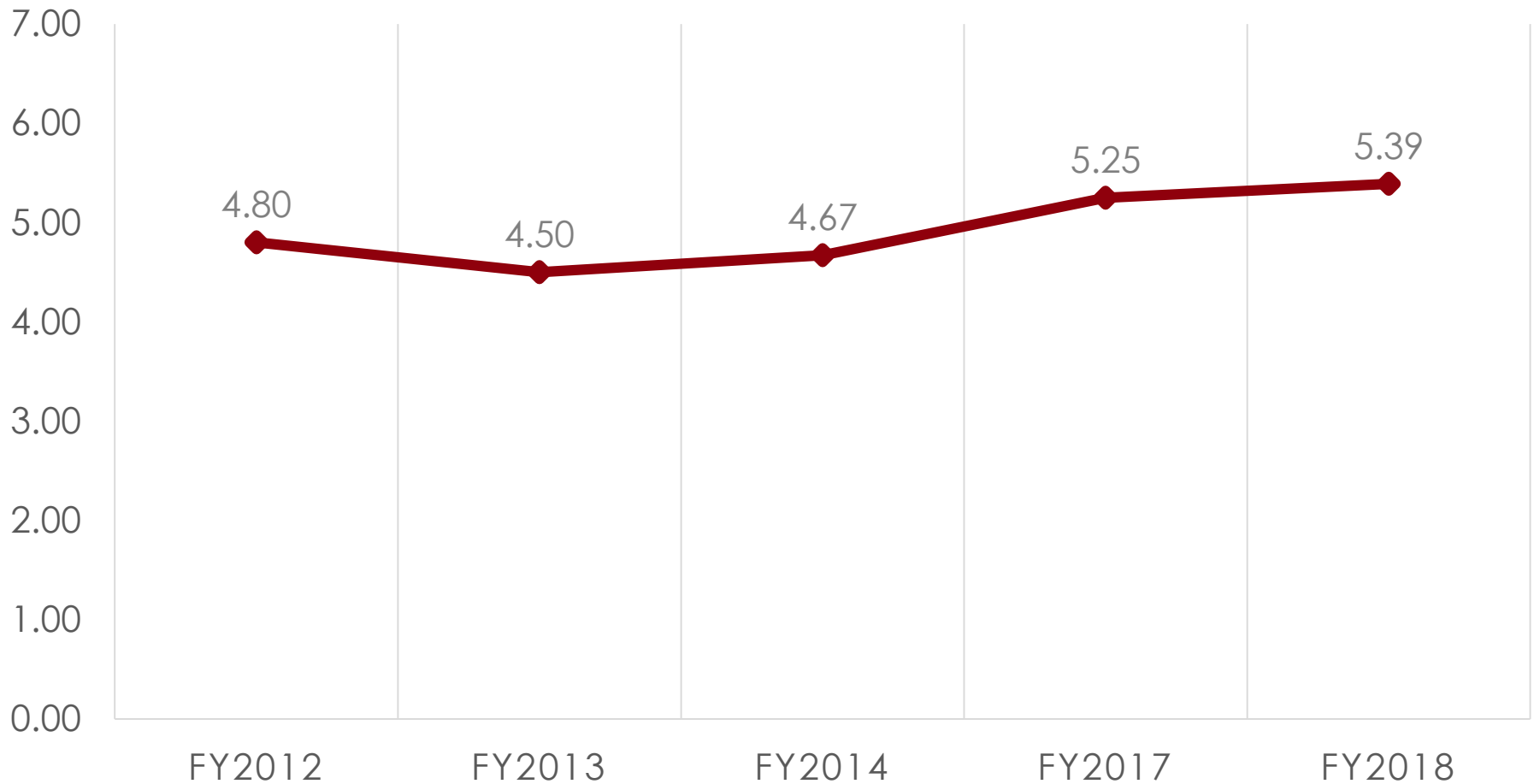
Taxis were clean



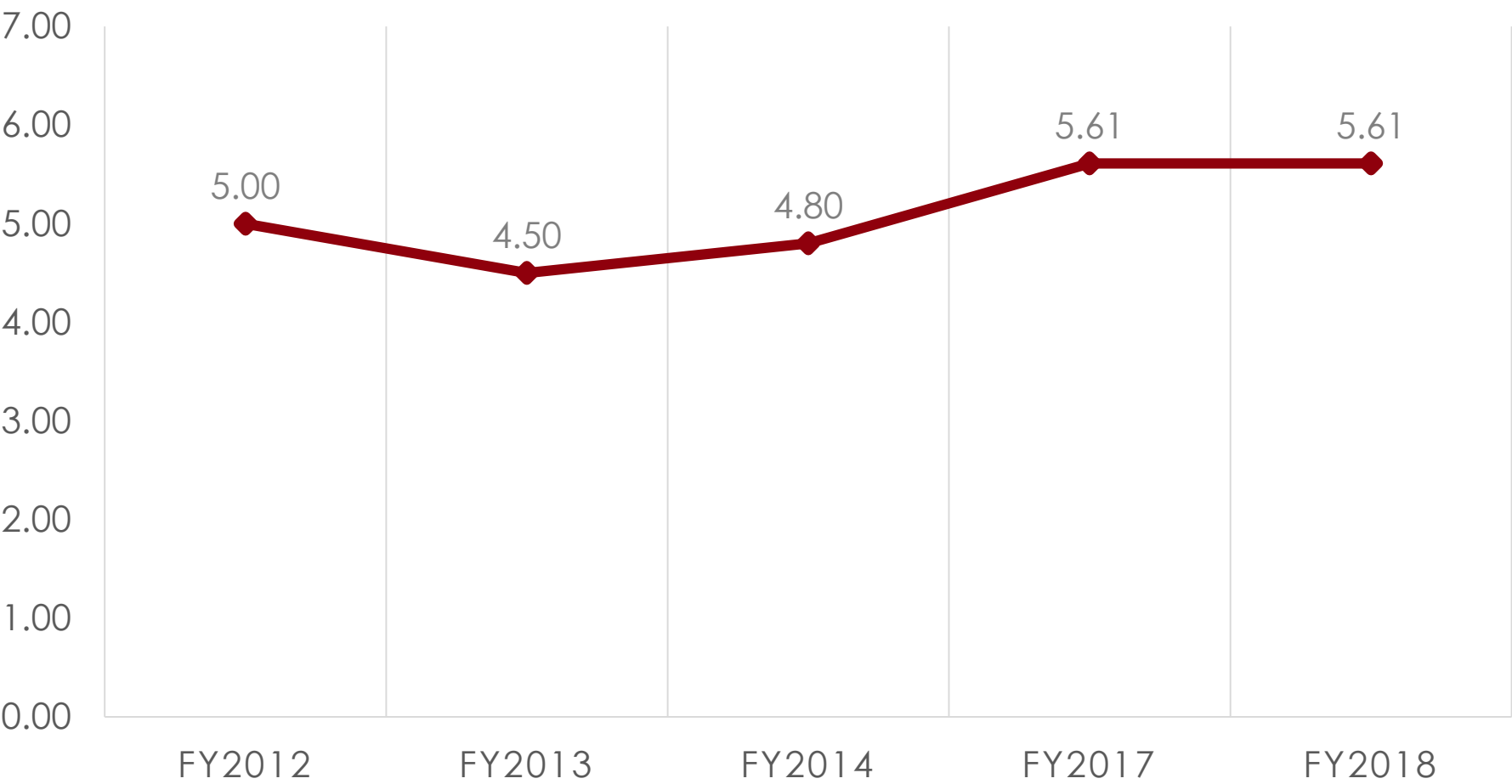
Guam airport was clean



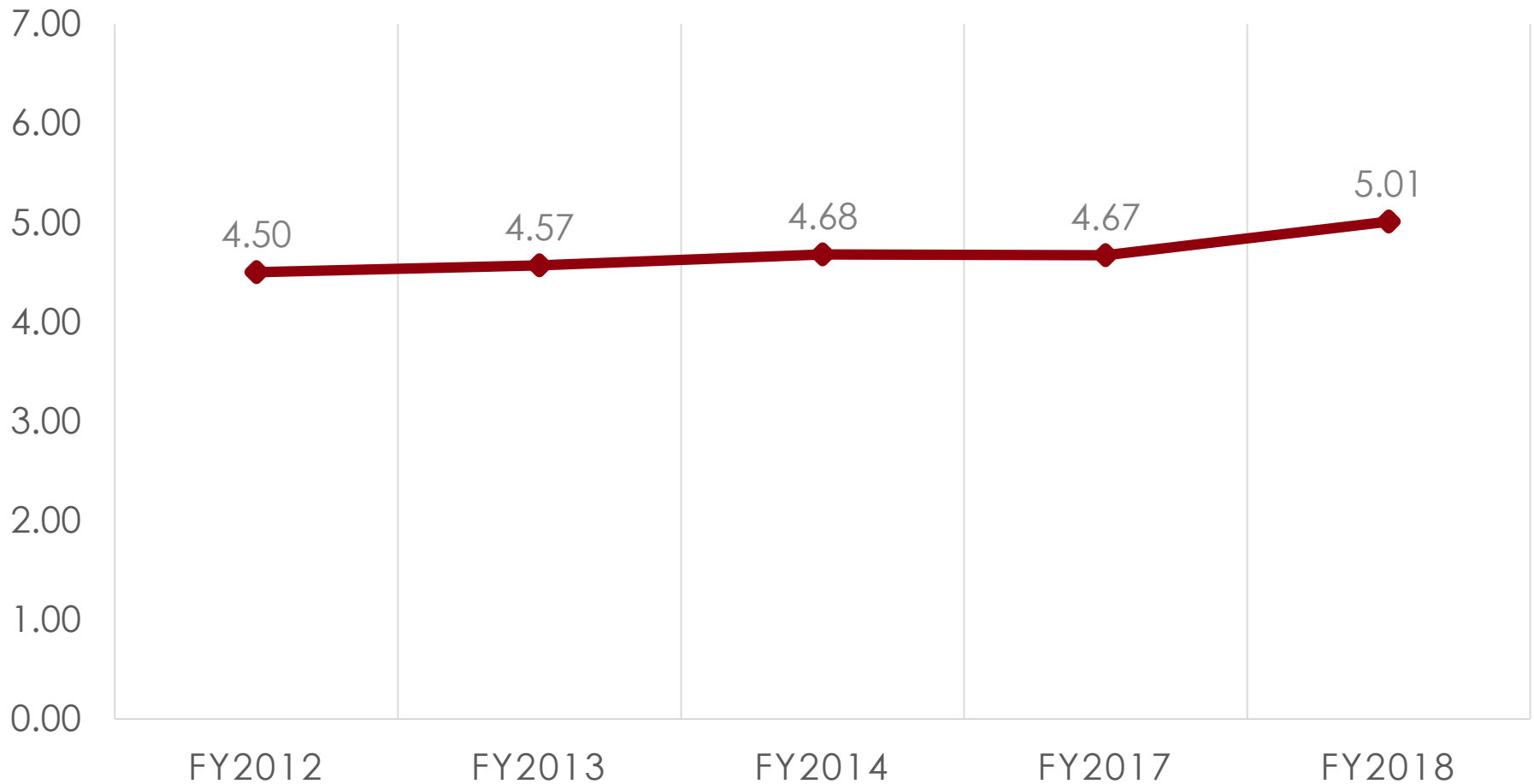
Ease of getting around



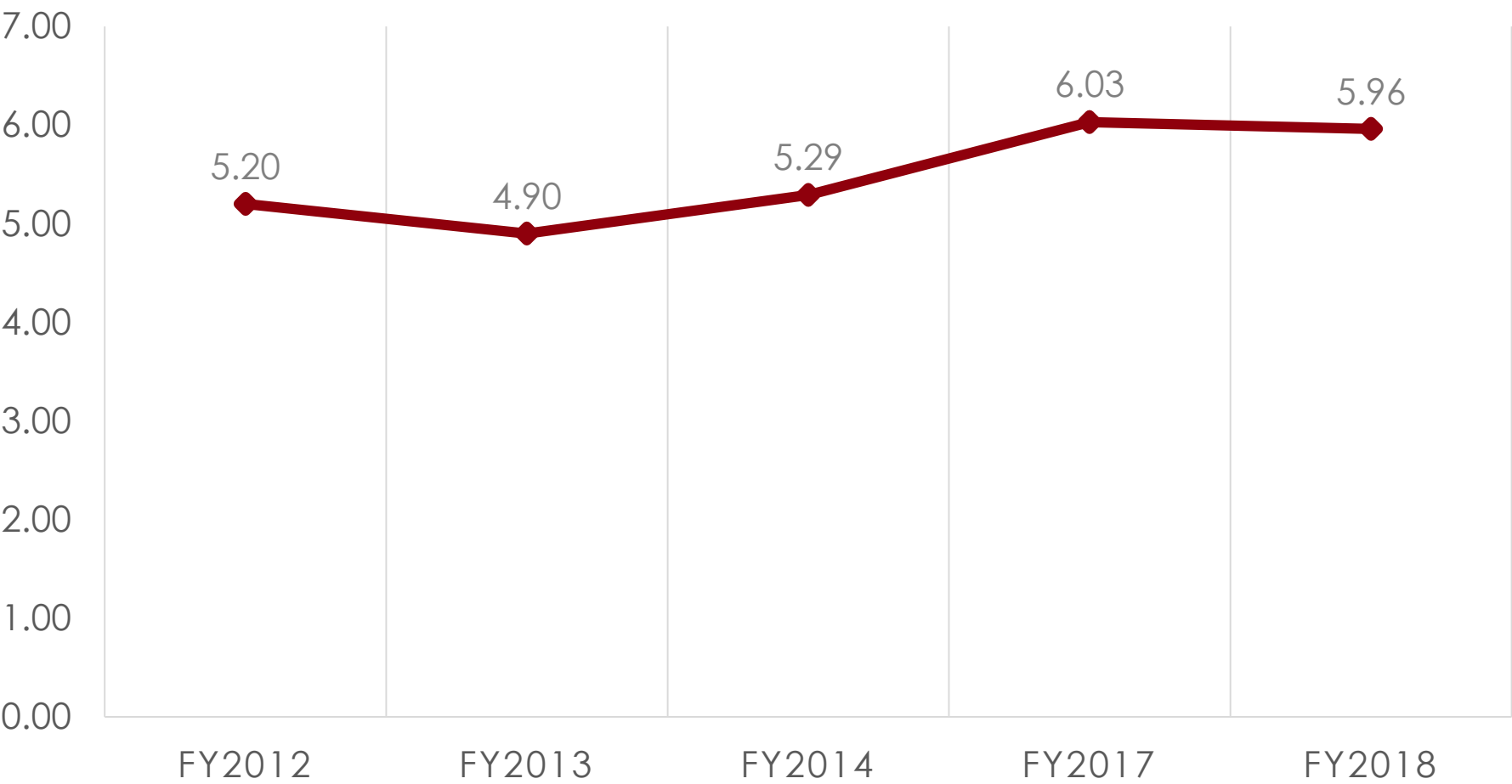
Safety walking around at night



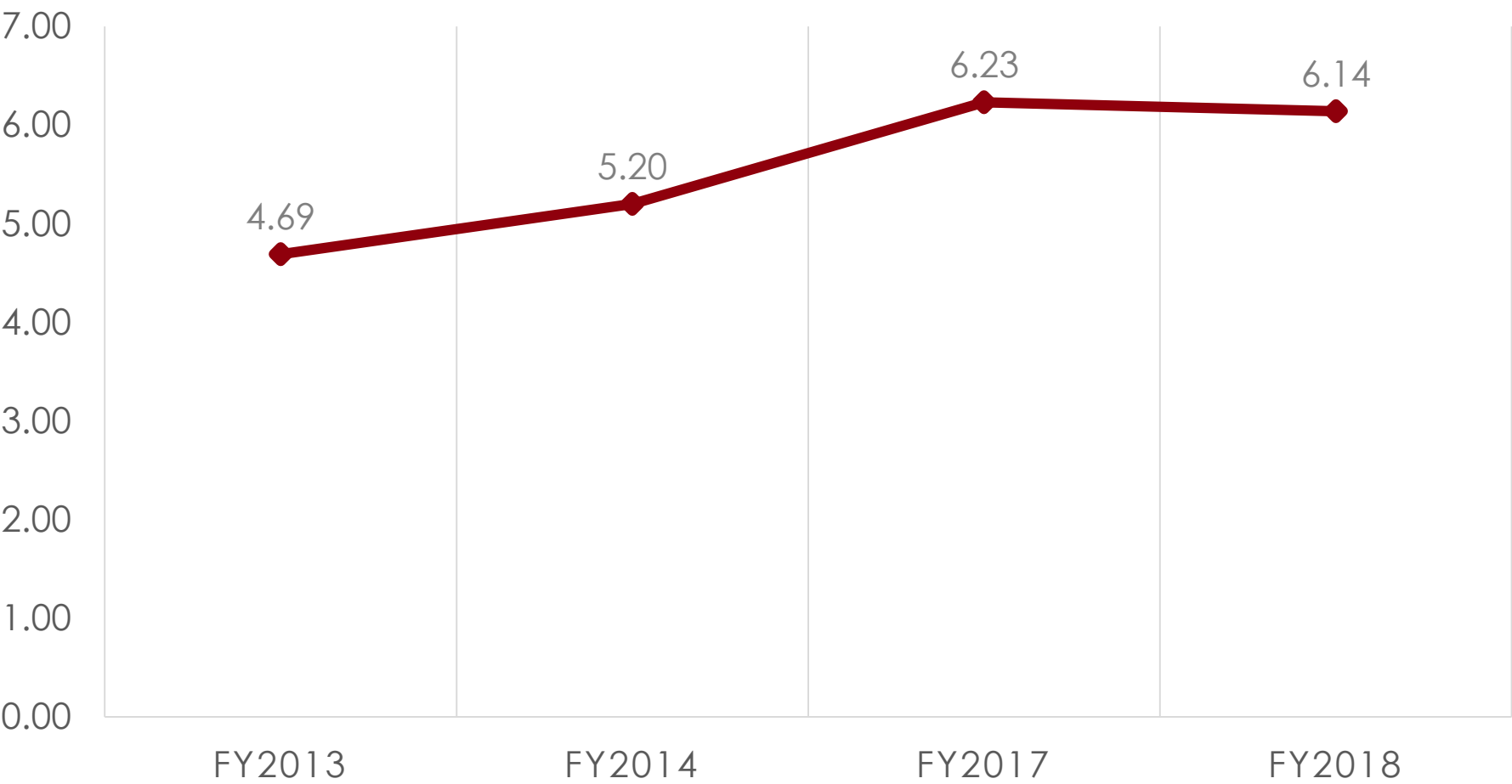
Price of things on Guam



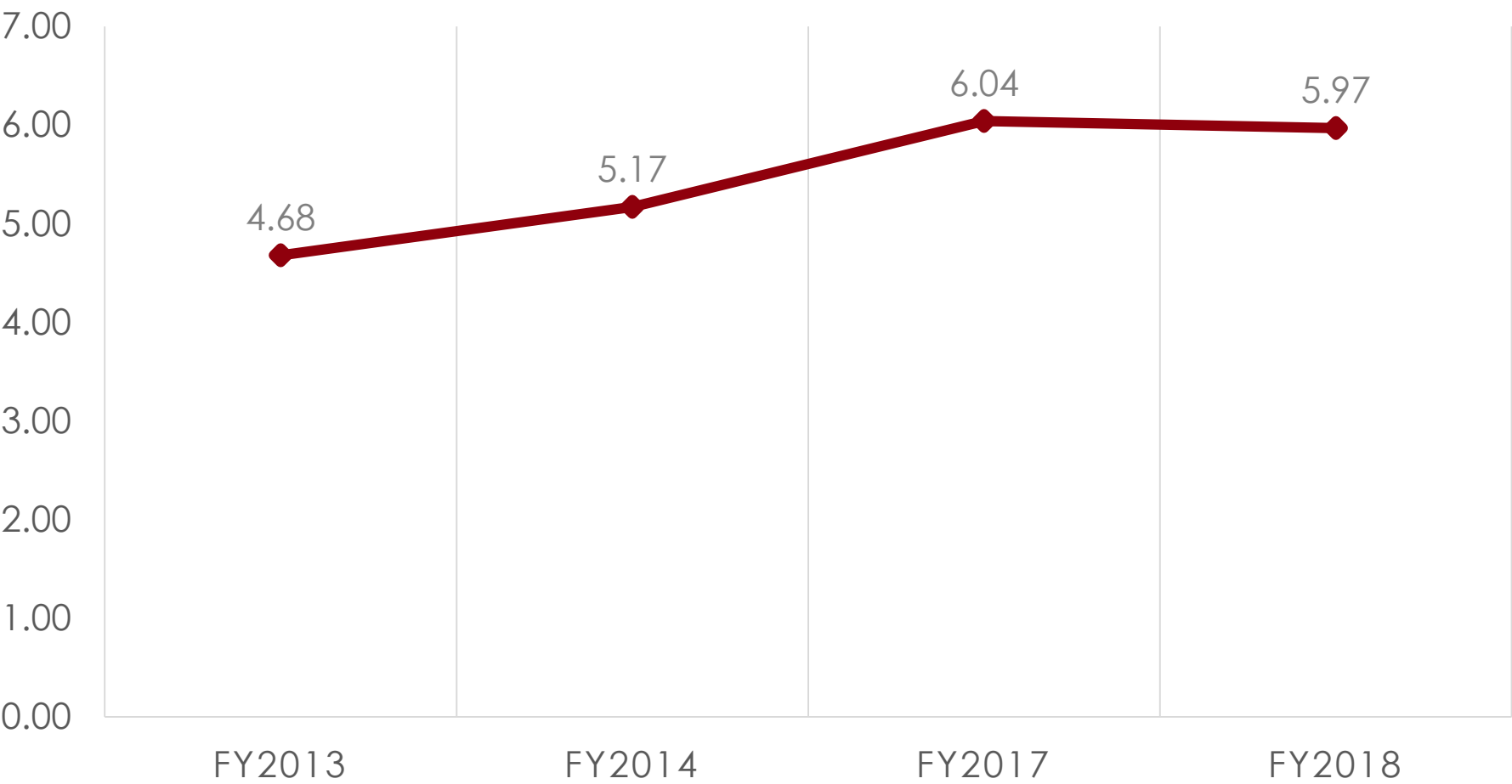
Quality/ Cleanliness - beach, ocean



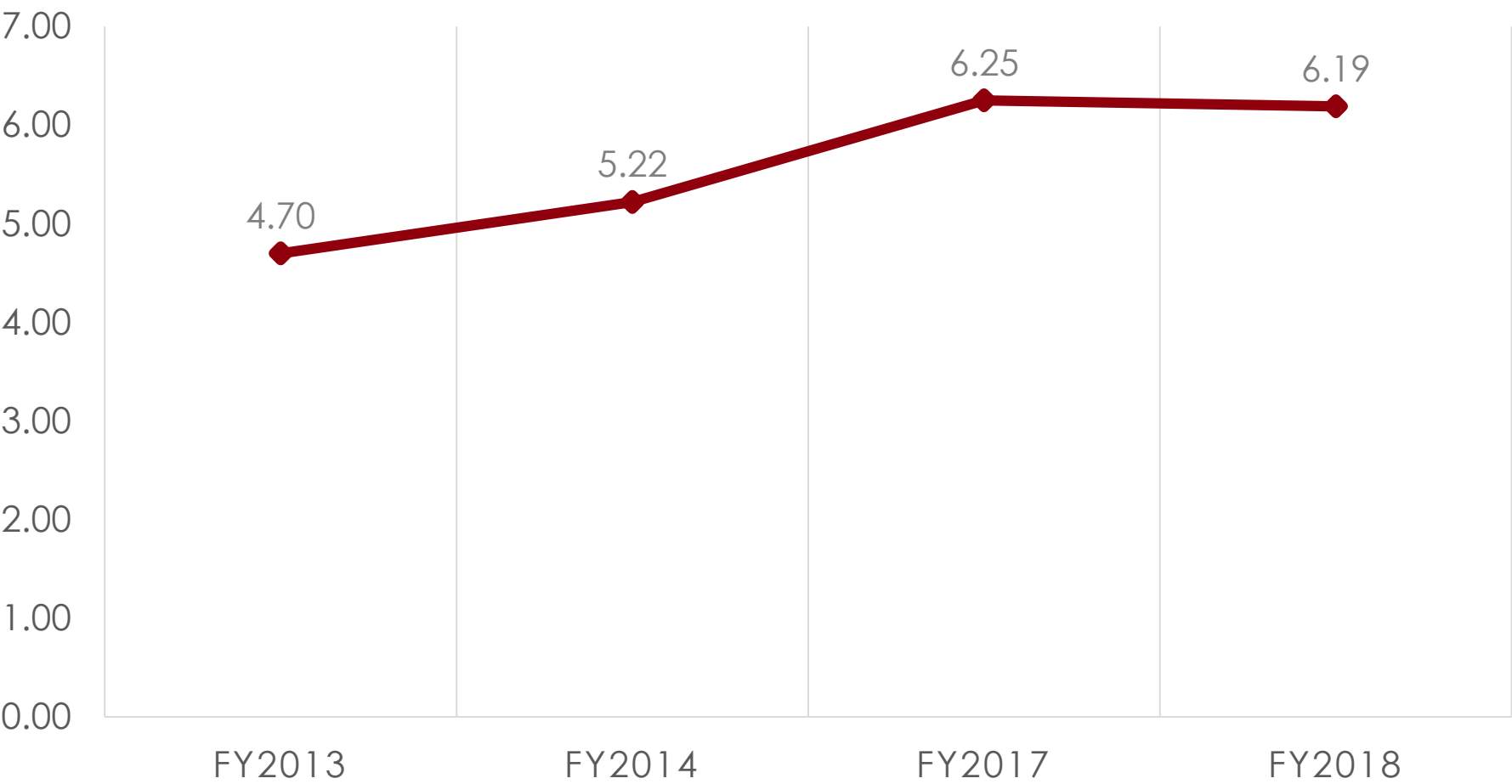
Quality/ Cleanliness - air, sky



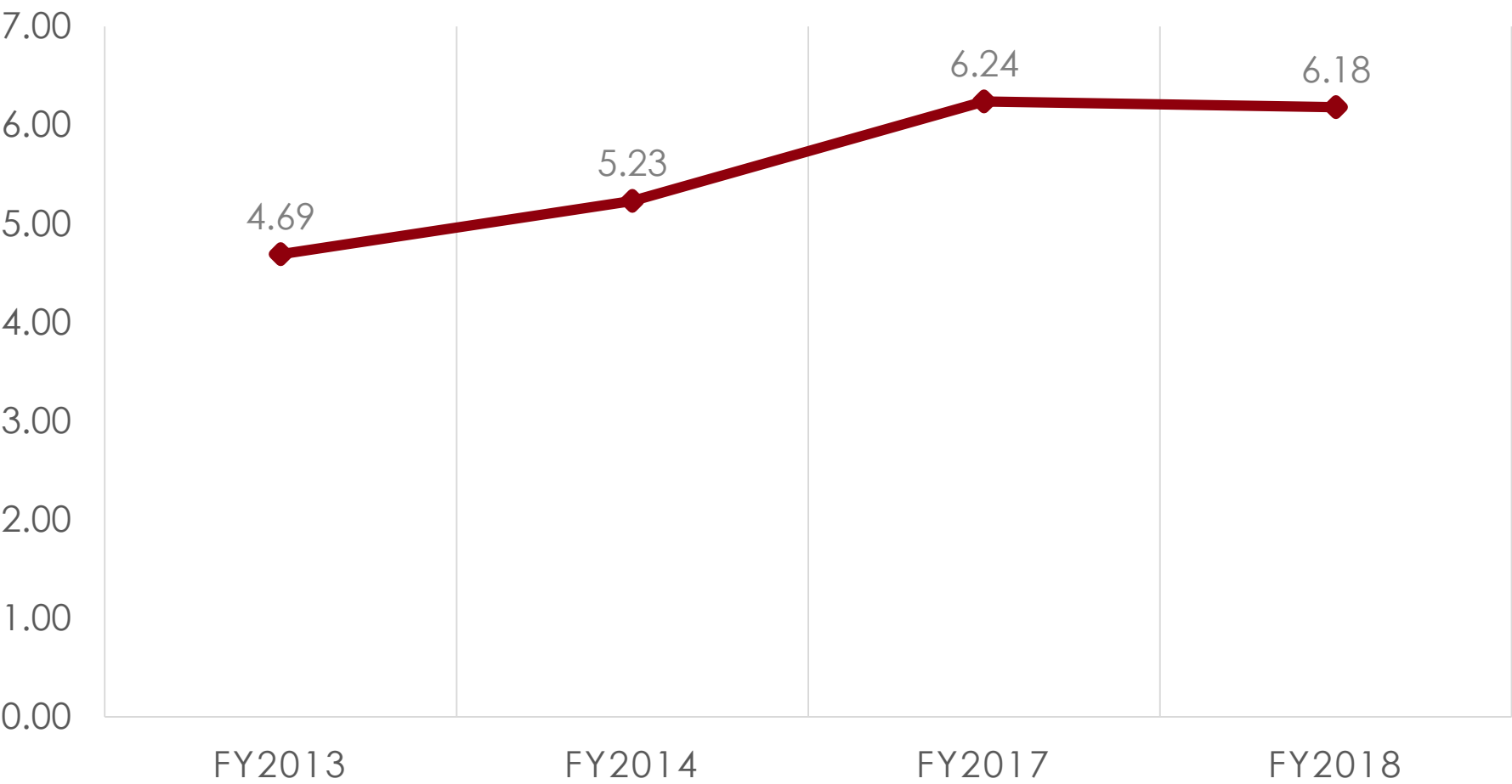
Quality/ Cleanliness- parks



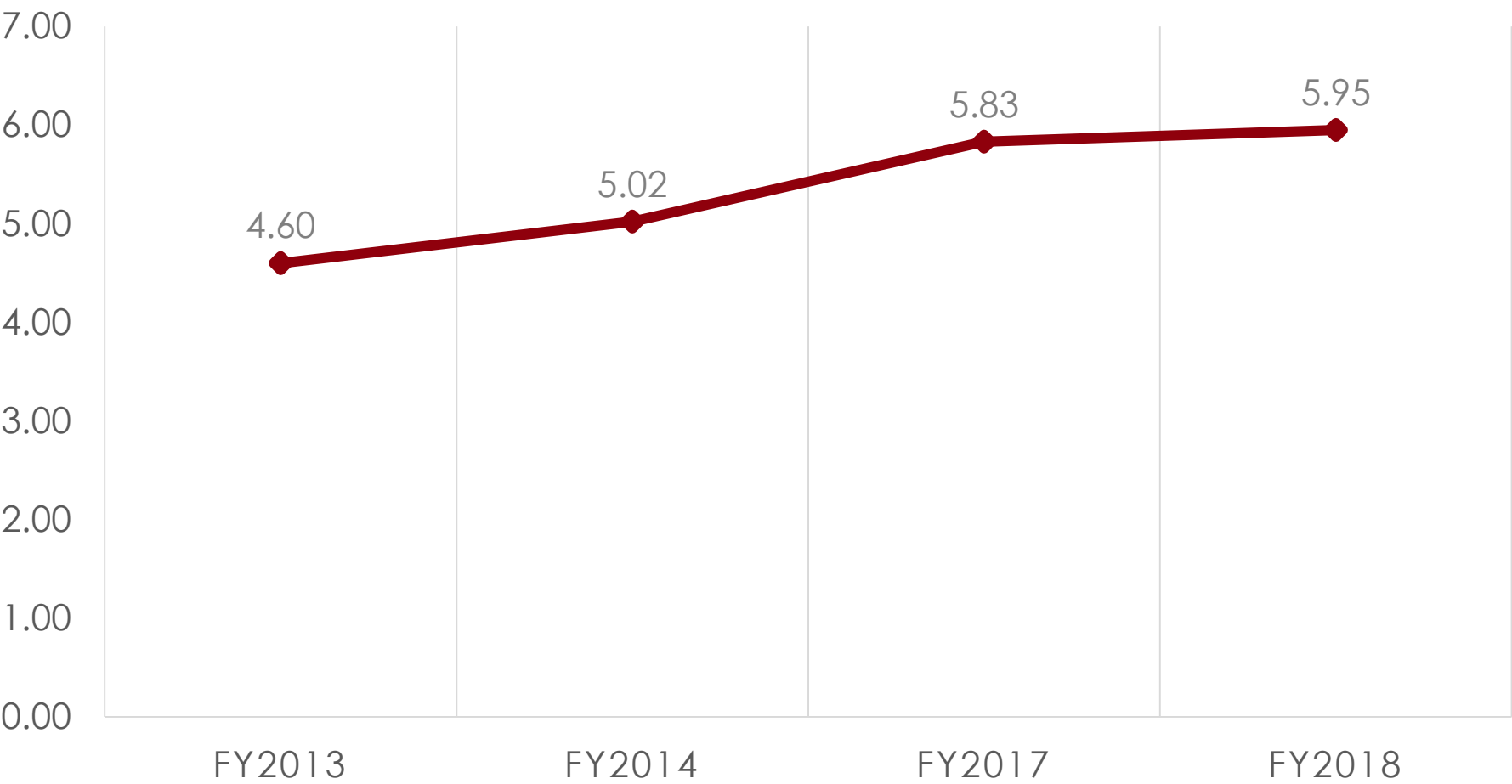
Quality - landscape Tumon



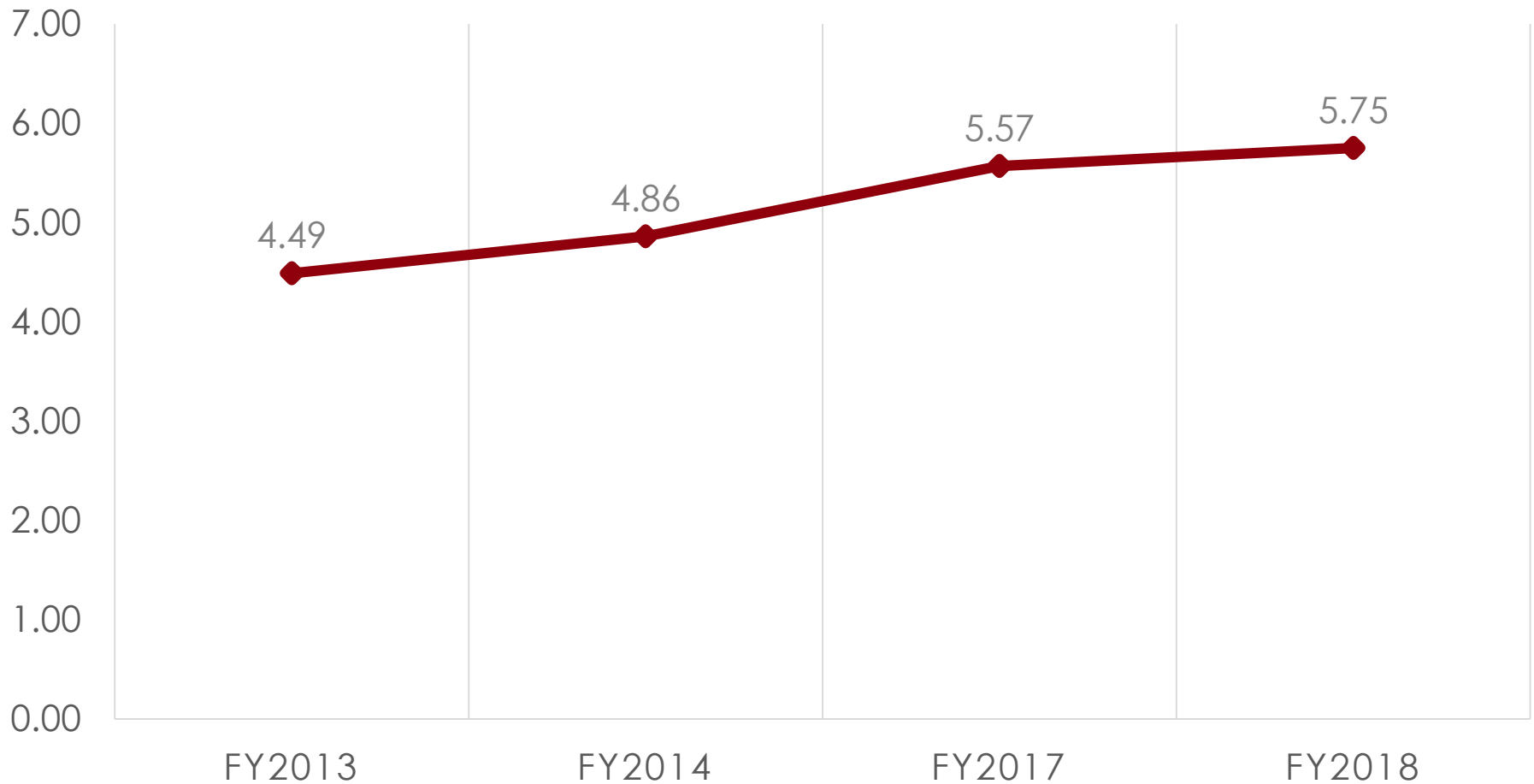
Quality - landscape Guam



Quality - ground handler

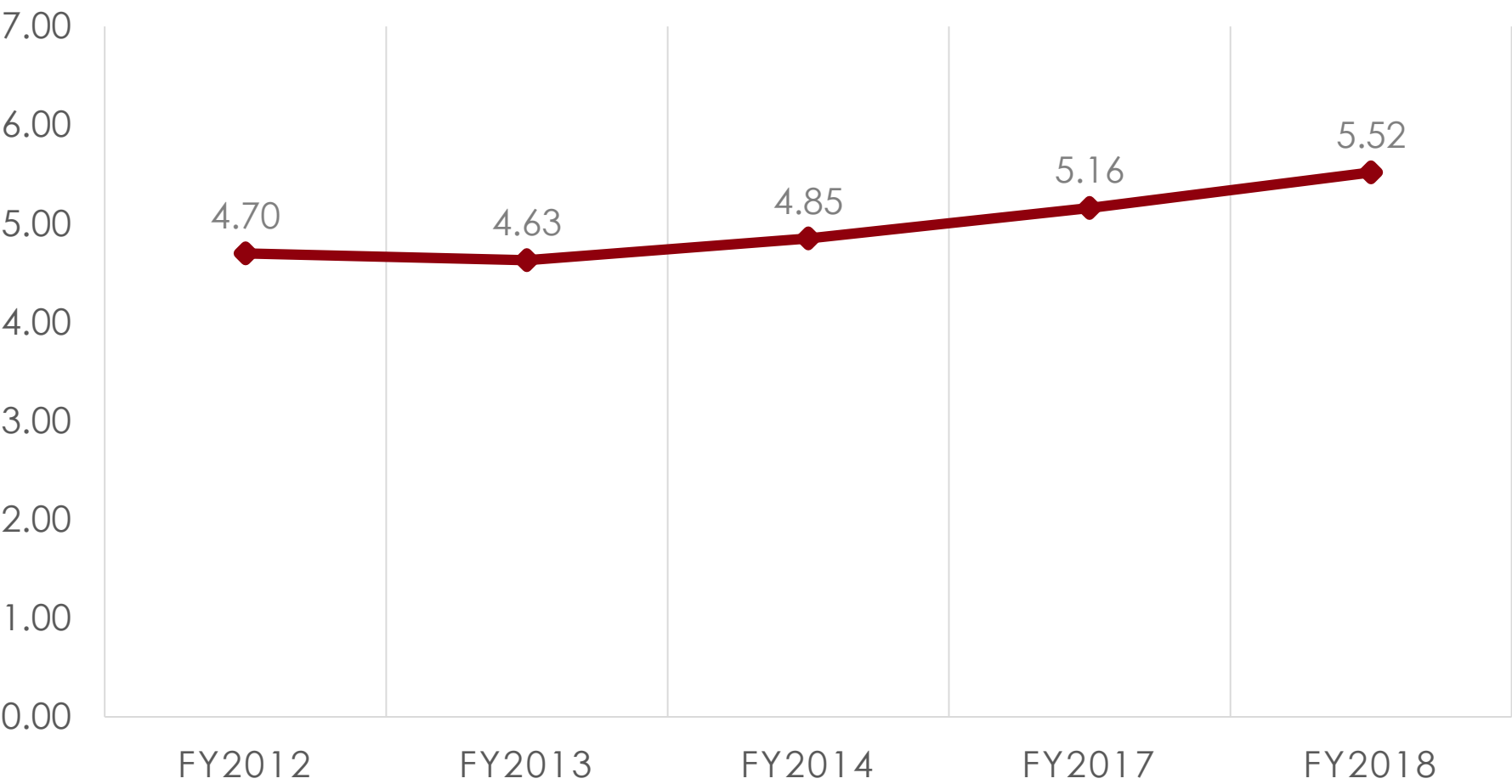


Quality/ Cleanliness - transportation vehicle



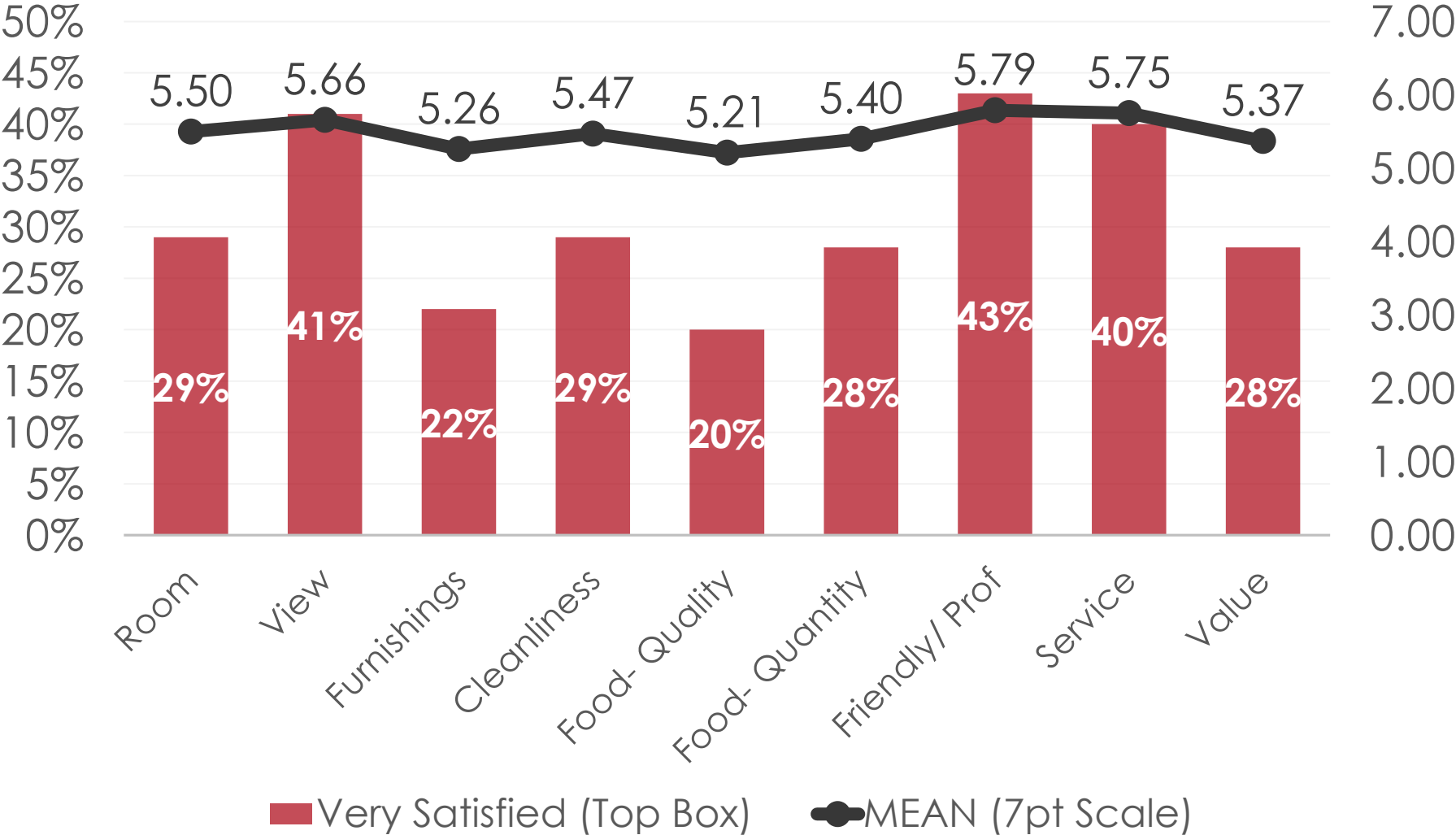
ACCOMMODATIONS

OVERALL SATISFACTION

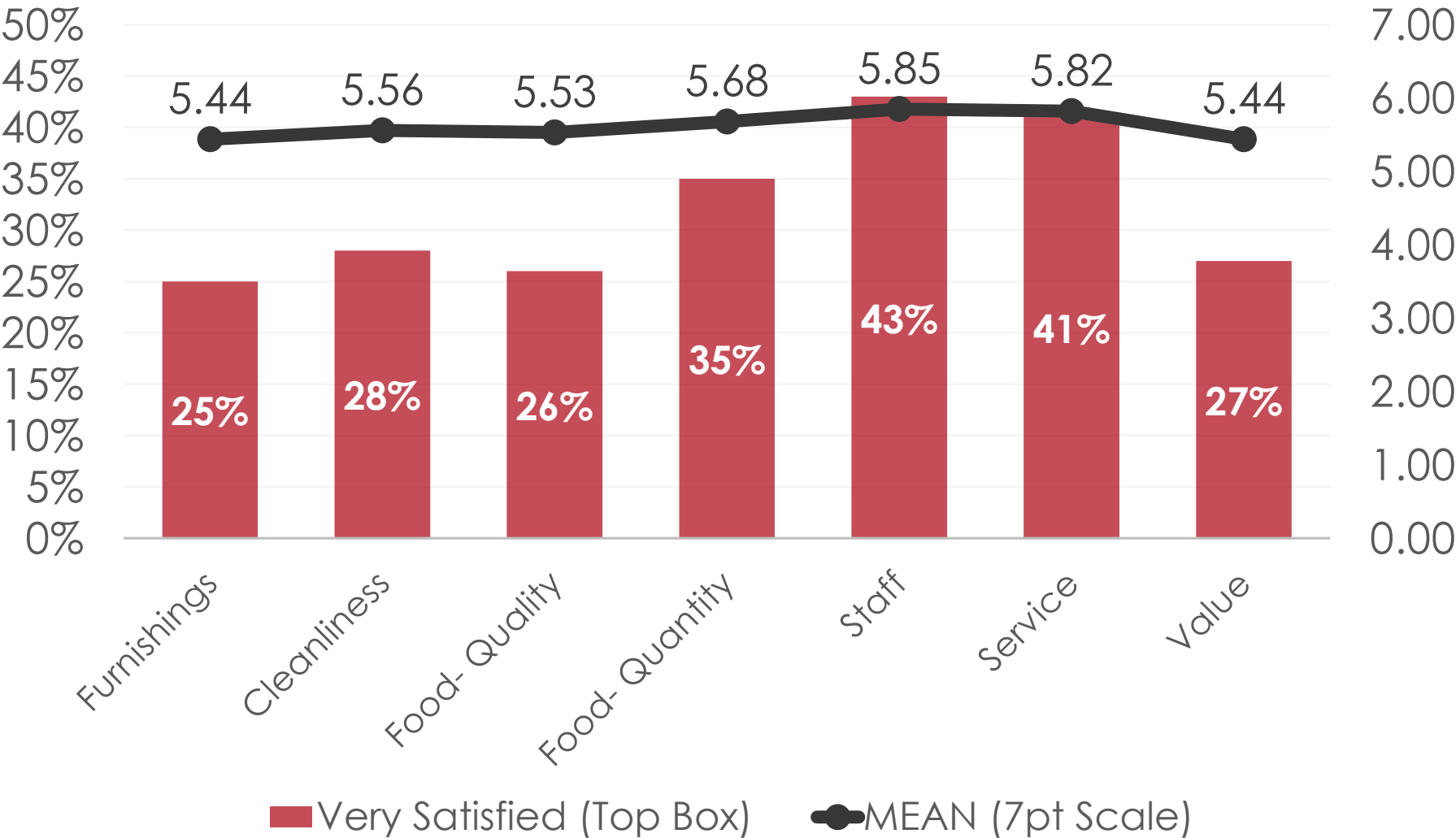


ACCOMMODATIONS –

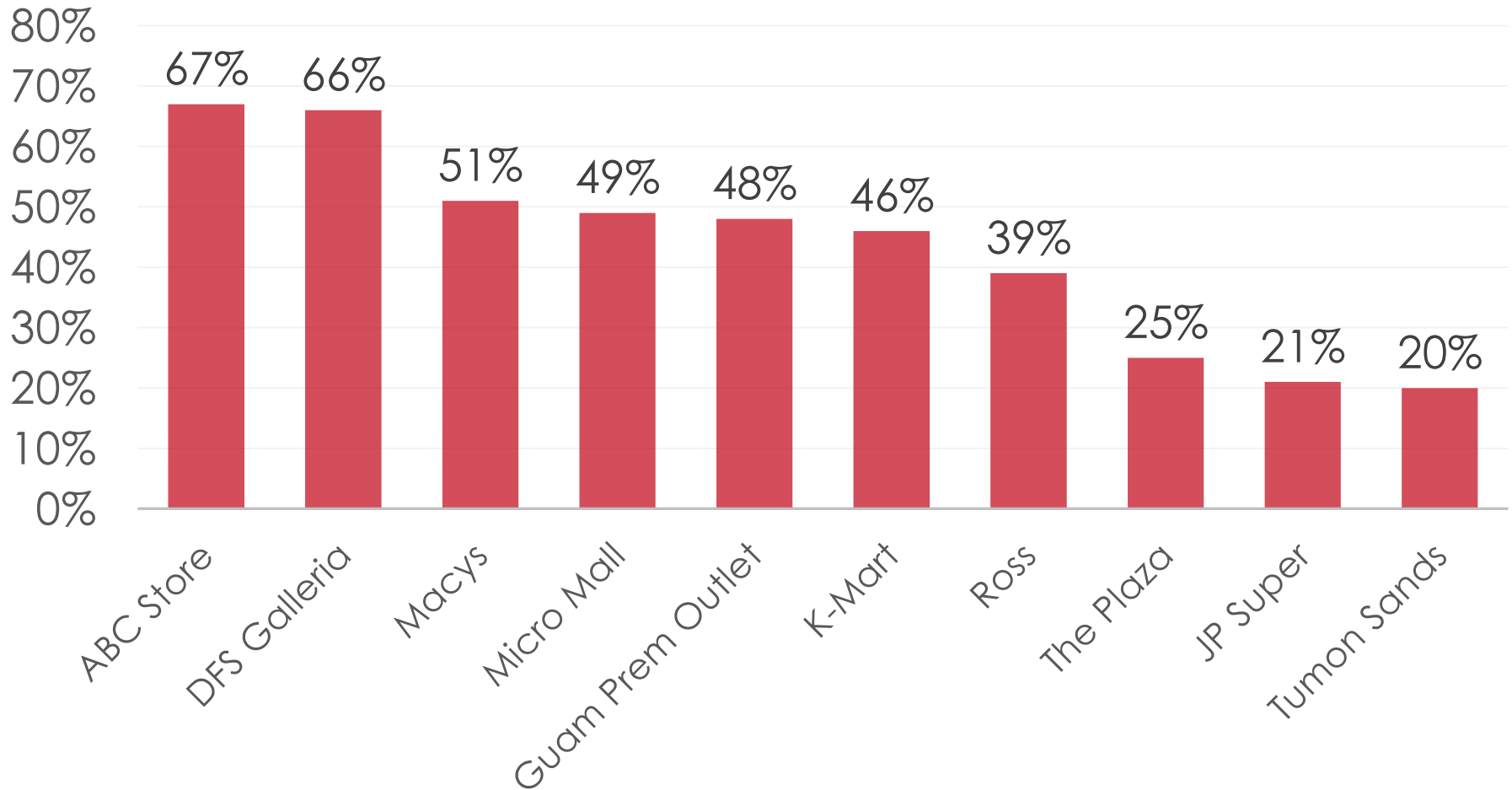
Satisfaction by Category



DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



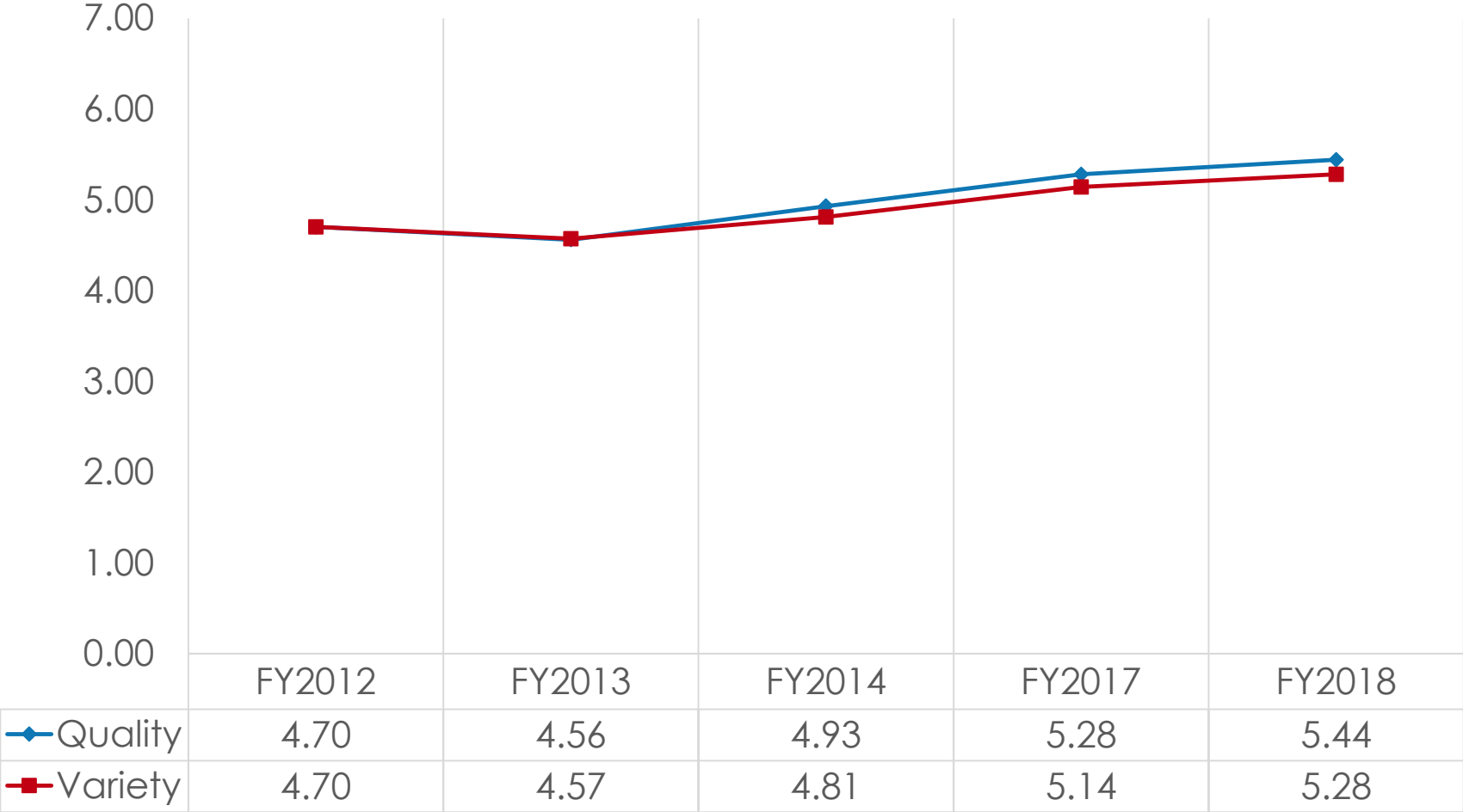
Shopping Malls/ Stores (Top Responses)



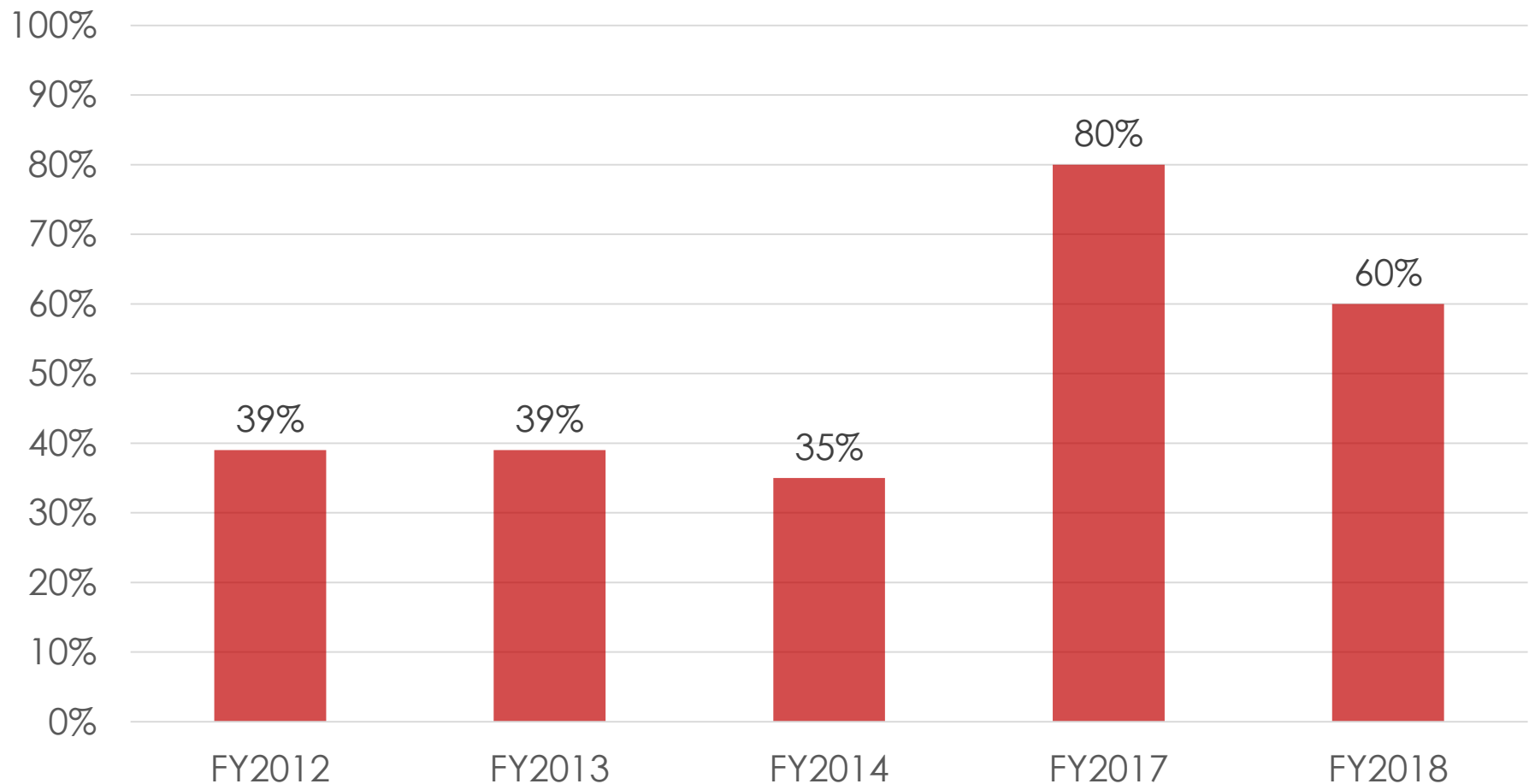
Shopping Malls/ Stores (Top 3)

| FY2012 | FY2013 | FY2014 | FY2017 | FY2018 |
|--|--|--|--|--|
| 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 | 67% ABC 66% DFS Galleria 51% Macy's |

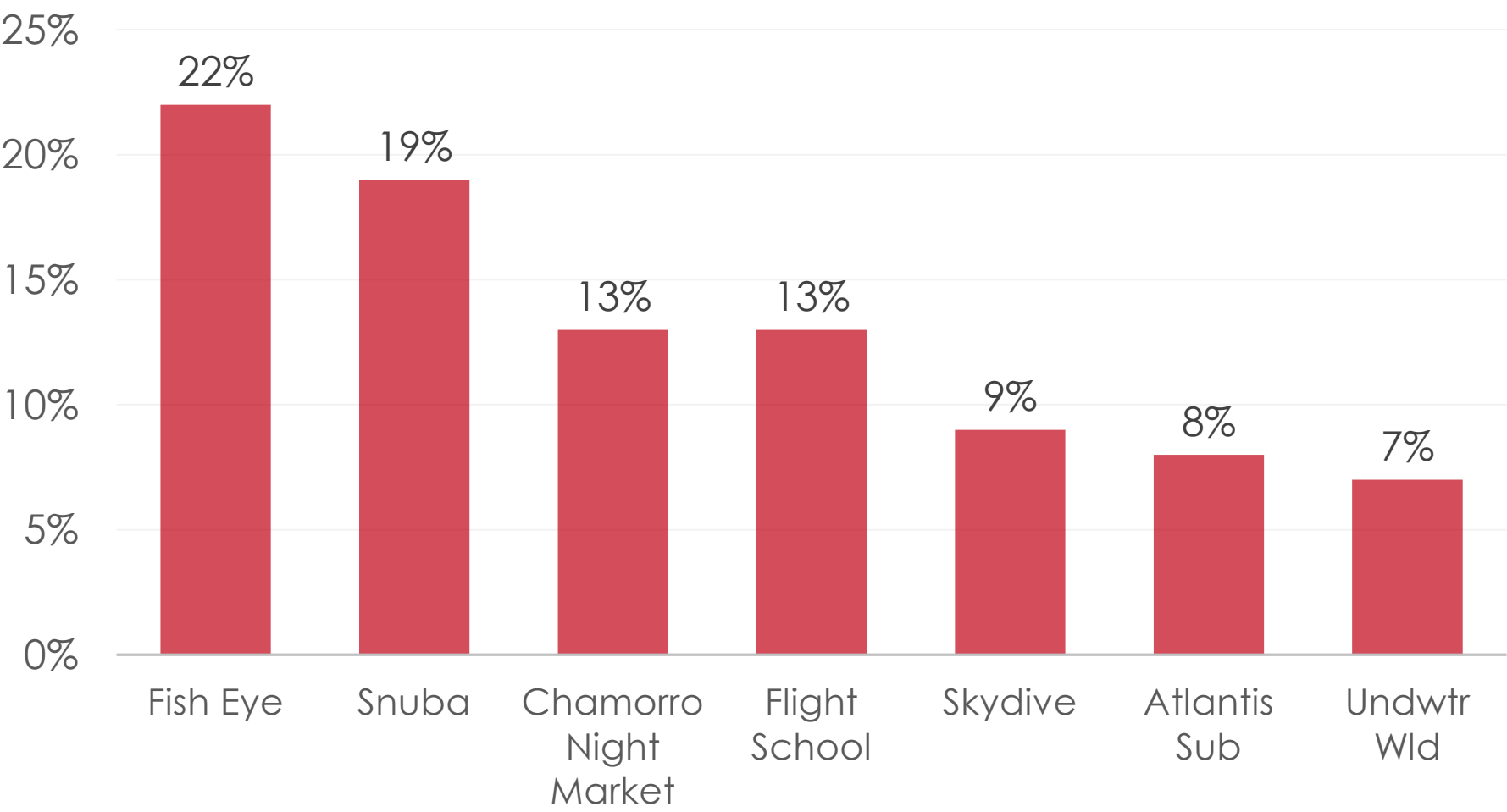
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – Tracking

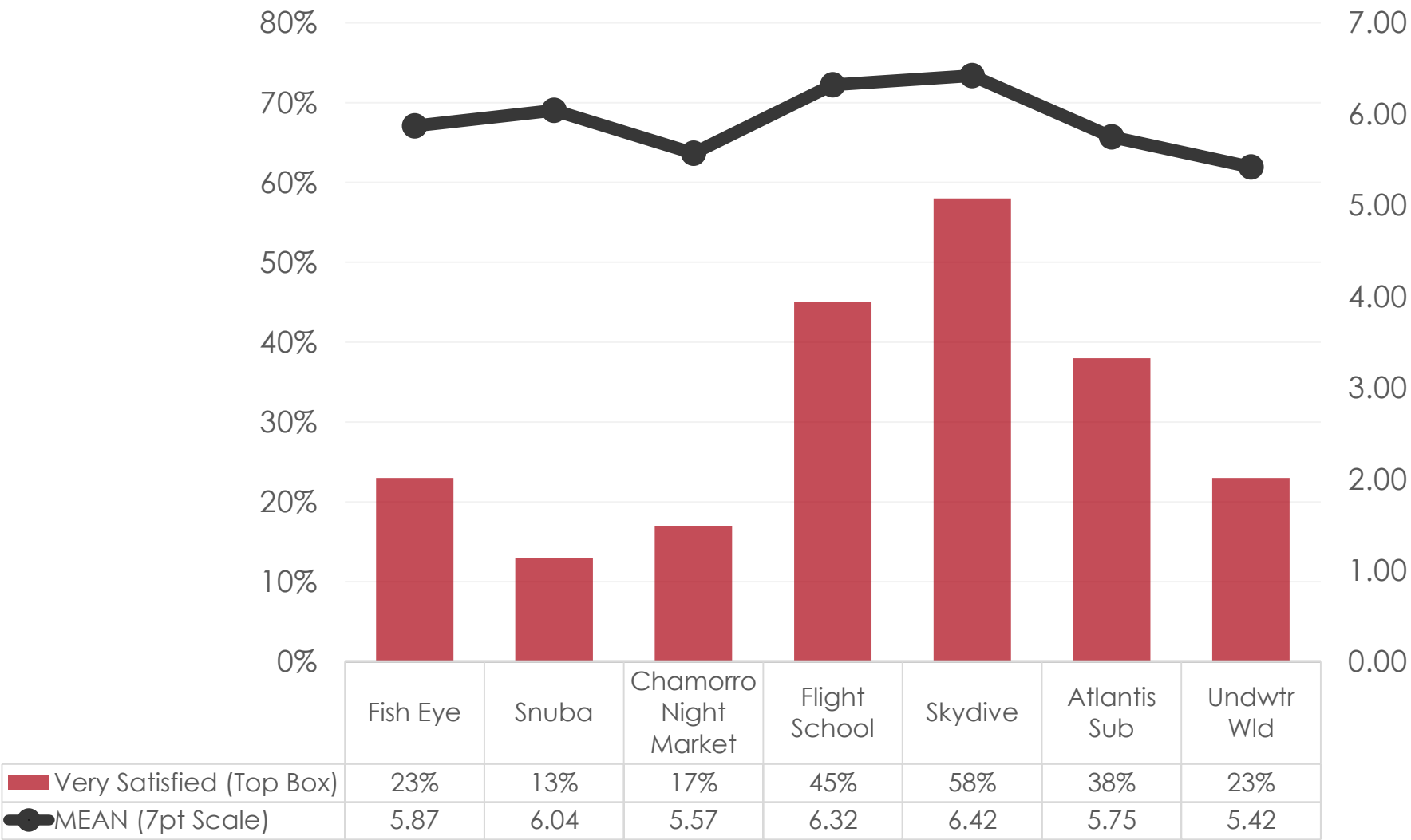


Optional Tour Participation (Top Responses) FY2018

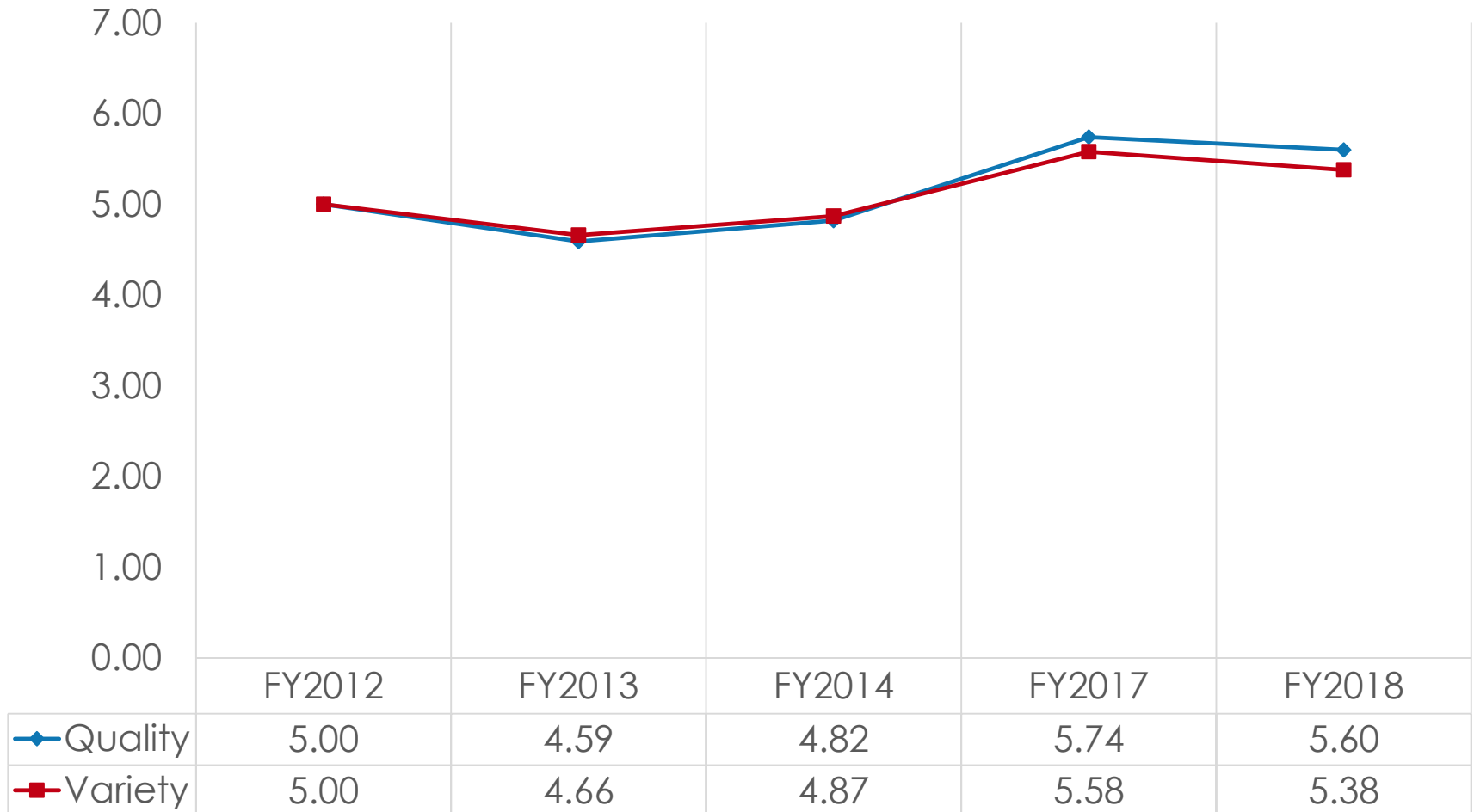


Optional Tour Satisfaction

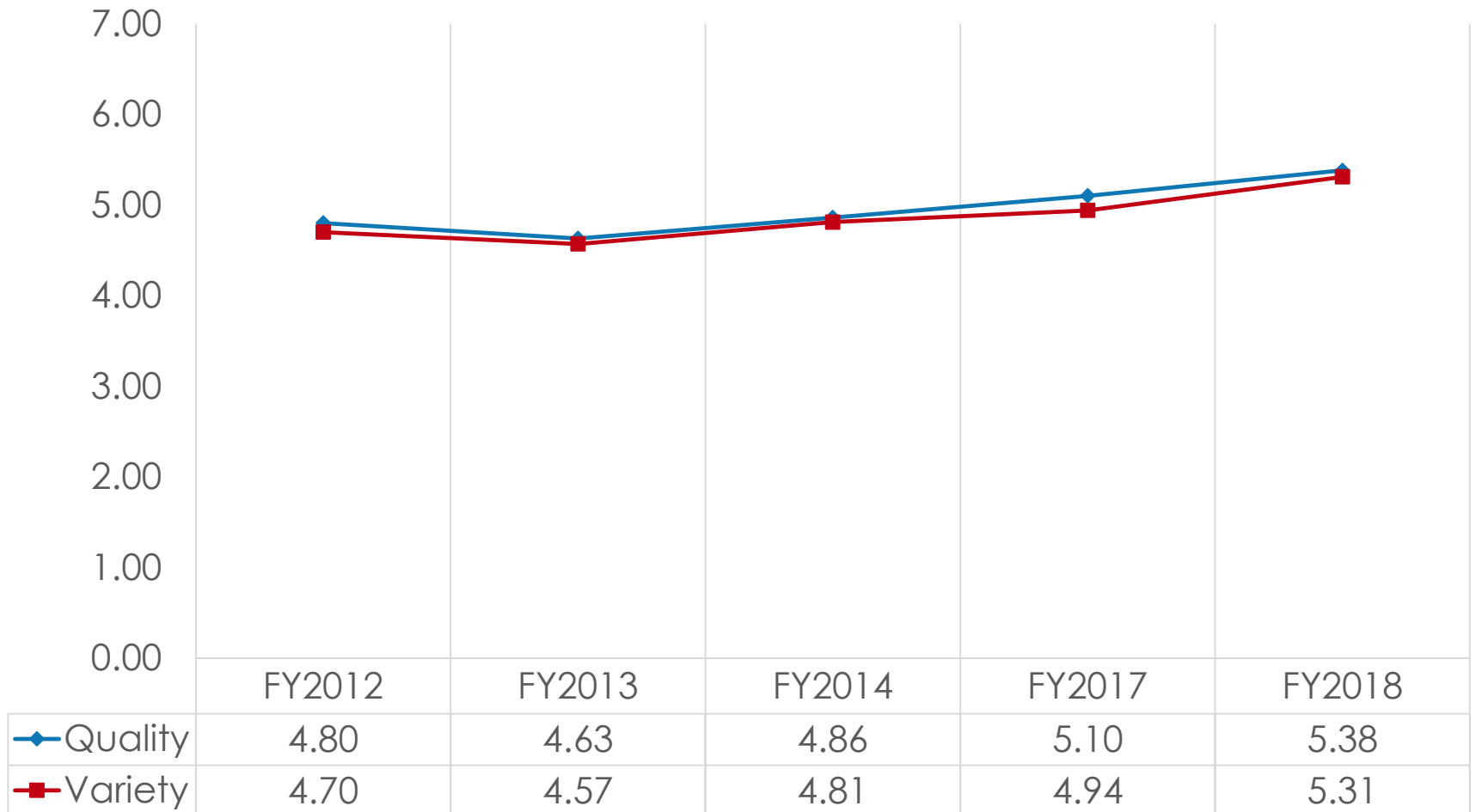
Top Responses only - Participation (5%+)



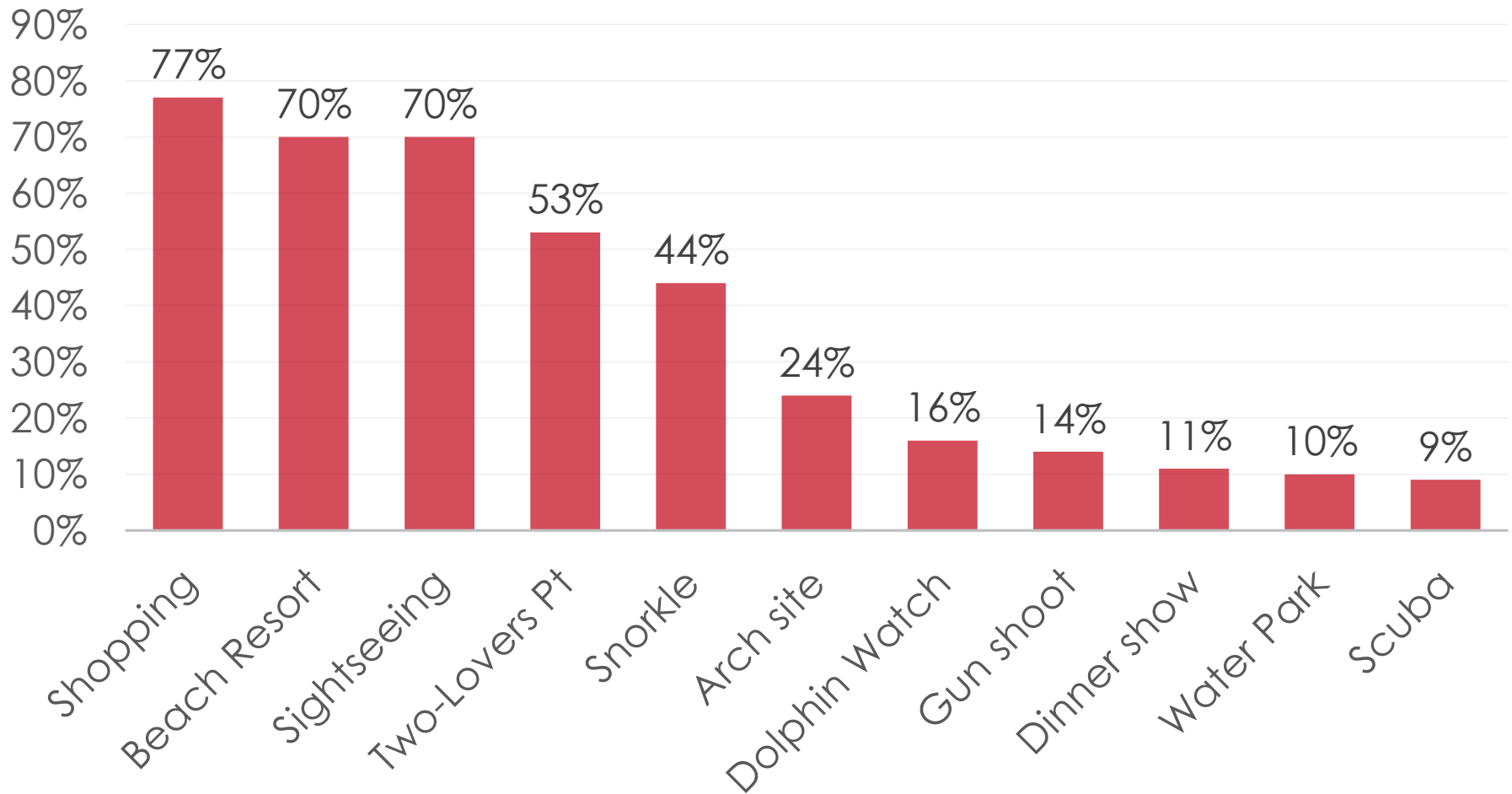
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION



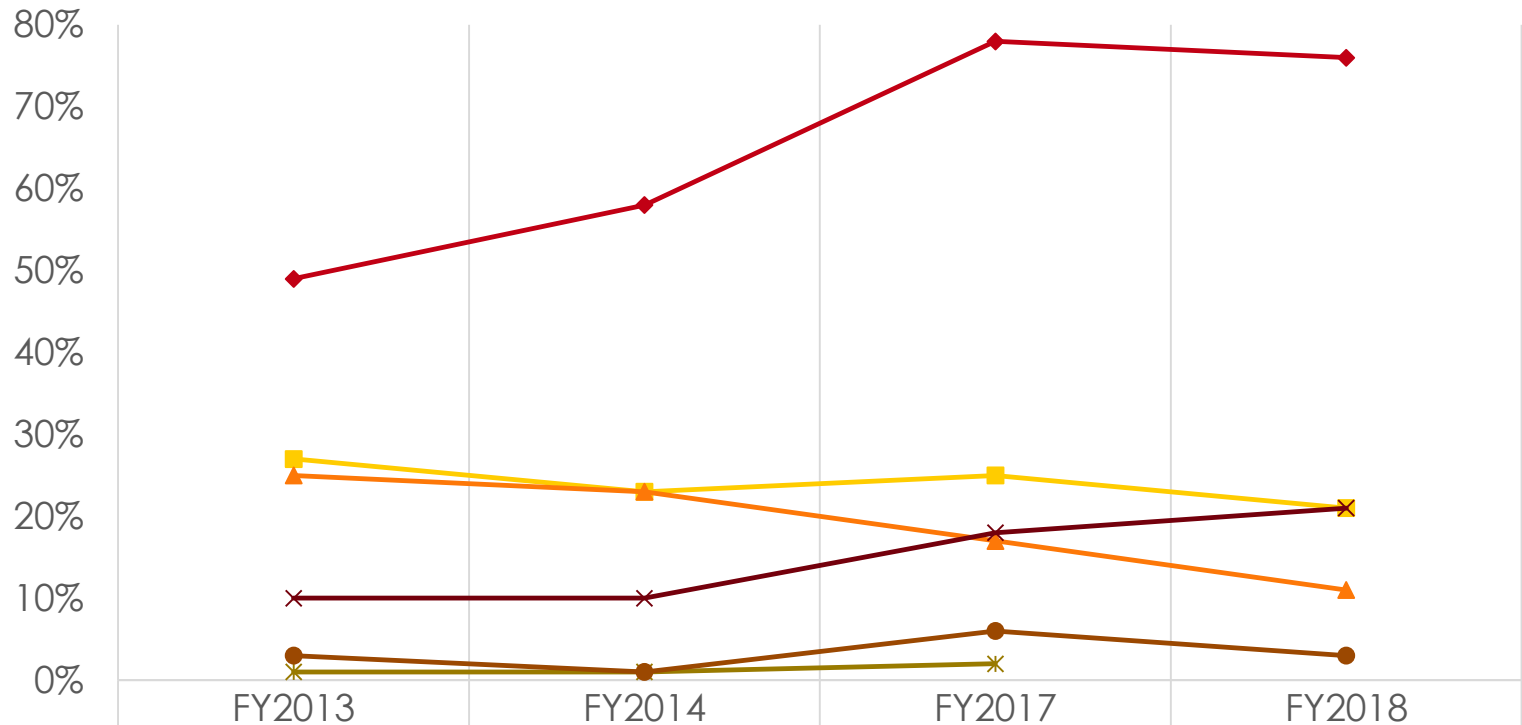
Activities Participation (Top Responses)



SECTION 5

PROMOTIONS

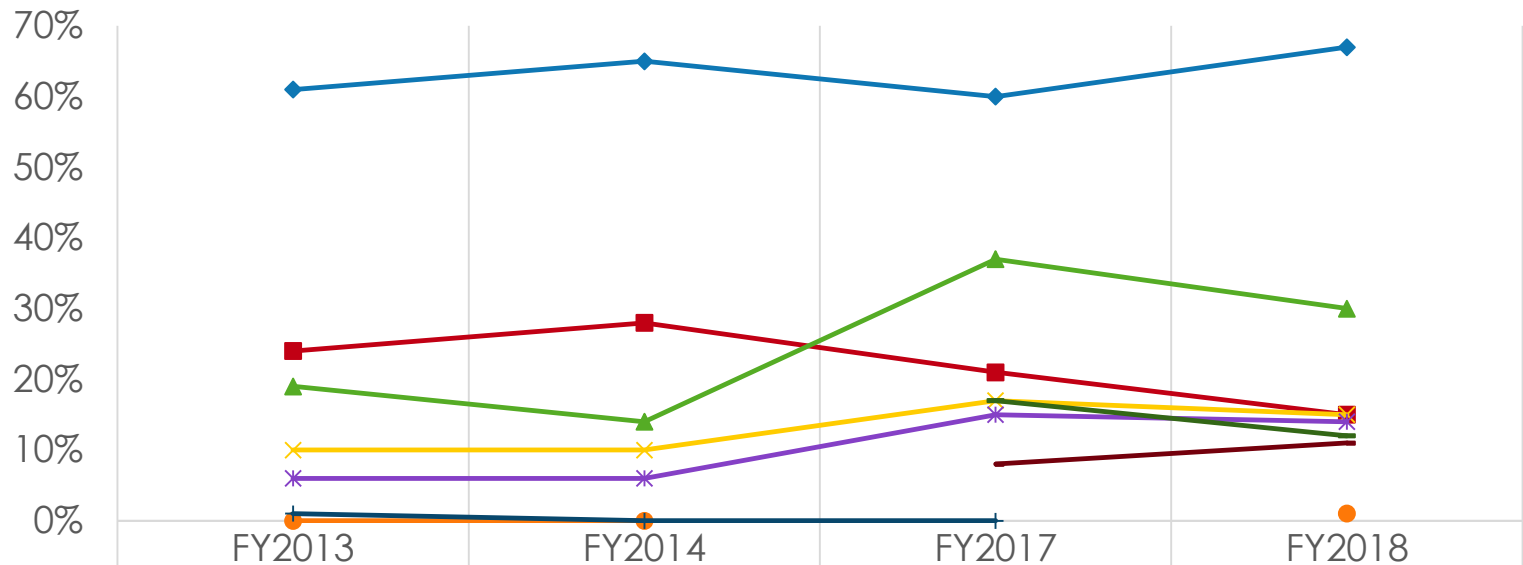
INTERNET- GUAM SOURCES OF INFORMATION



| | | | | |
|------------------|--------|--------|--------|--------|
| ◆ Search Engines | FY2013 | FY2014 | FY2017 | FY2018 |
| ■ Blogs | 49% | 58% | 78% | 76% |
| ▲ Forums | 27% | 23% | 25% | 21% |
| ✕ Social Network | 25% | 23% | 17% | 11% |
| * Other | 10% | 10% | 18% | 21% |
| ● Q&A Site | 1% | 1% | 2% | |
| | 3% | 1% | 6% | 3% |

INTERNET- SOURCES OF INFORMATION

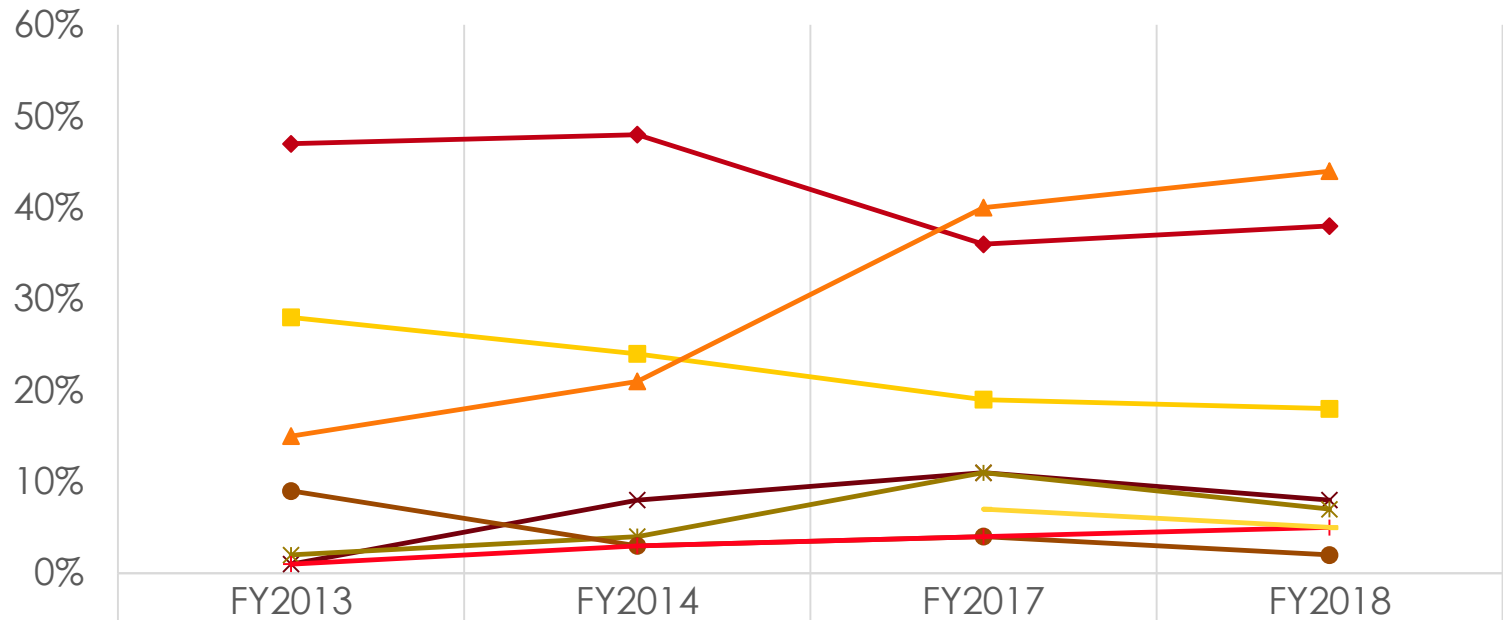
Things to do on Guam



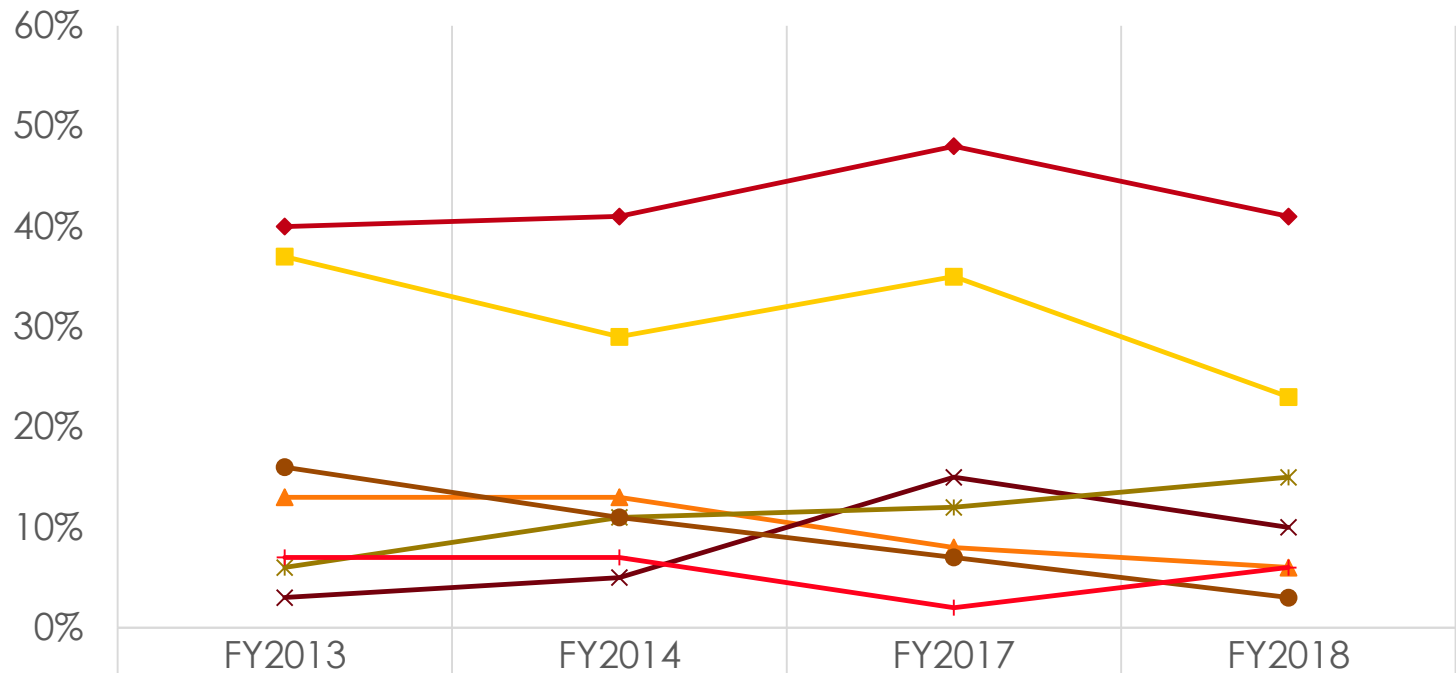
| | | | | |
|----------------|-----|-----|-----|-----|
| Google | 61% | 65% | 60% | 67% |
| Yahoo | 24% | 28% | 21% | 15% |
| Baidu | 19% | 14% | 37% | 30% |
| Facebook | 10% | 10% | 17% | 15% |
| Weibo | 6% | 6% | 15% | 14% |
| Twitter | 0% | 0% | | 1% |
| Naver | 1% | 0% | 0% | |
| Instagram2 | | | 8% | 11% |
| Online Booking | | | 17% | 12% |

INTERNET- SOURCES OF INFORMATION

GVB

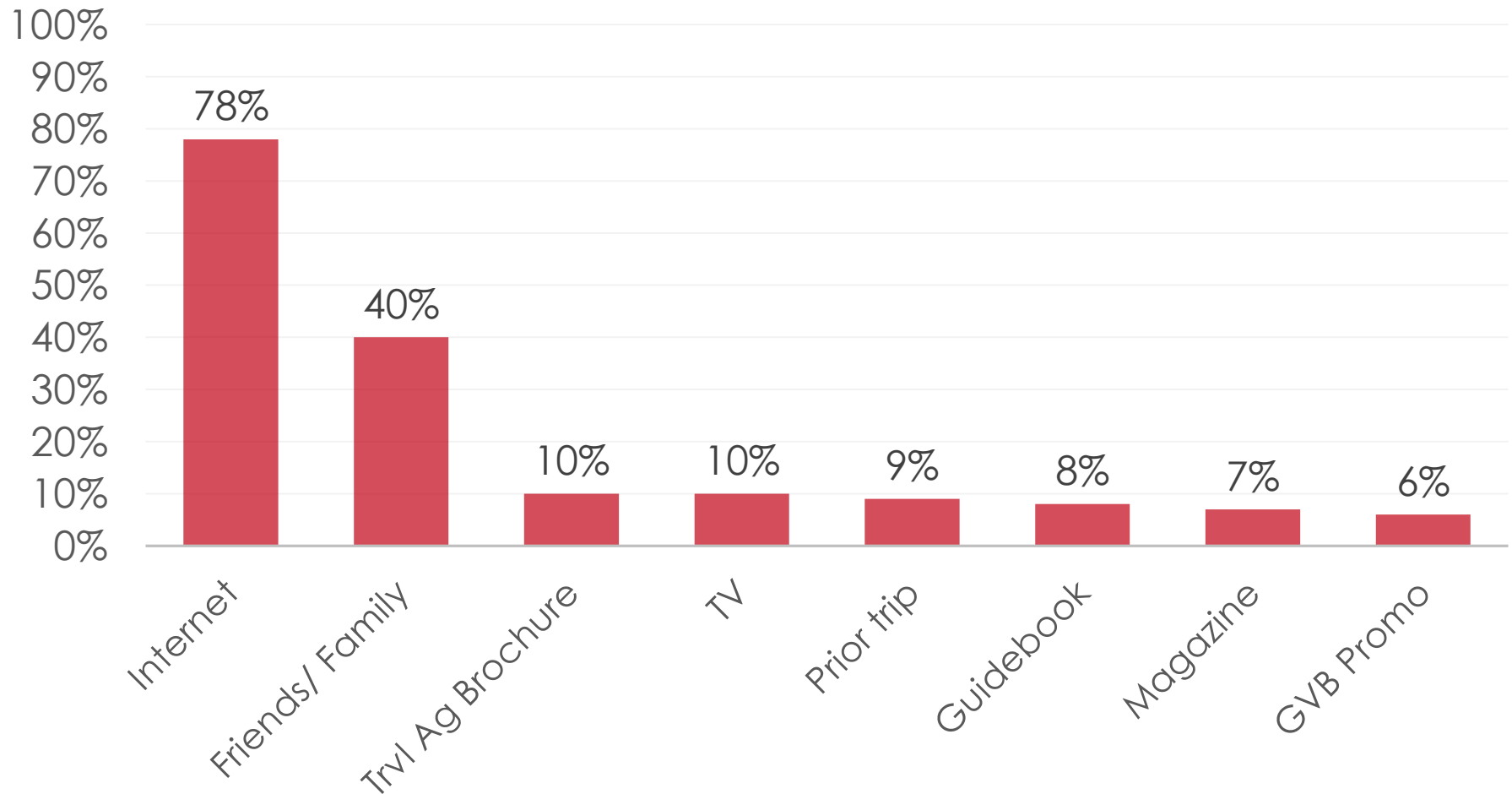


TRAVEL MOTIVATION



| | | | | |
|---------------------|--------|--------|--------|--------|
| ◆ Friends/ Family | FY2013 | FY2014 | FY2017 | FY2018 |
| ■ Internet | 40% | 41% | 48% | 41% |
| ▲ Travel Agent | 37% | 29% | 35% | 23% |
| ✕ Social media | 13% | 13% | 8% | 6% |
| * Travel shows | 3% | 5% | 15% | 10% |
| ● Magazine | 6% | 11% | 12% | 15% |
| + Company/ Bus Trip | 16% | 11% | 7% | 3% |
| | 7% | 7% | 2% | 6% |

PRE-ARRIVAL SOURCES OF INFORMATION



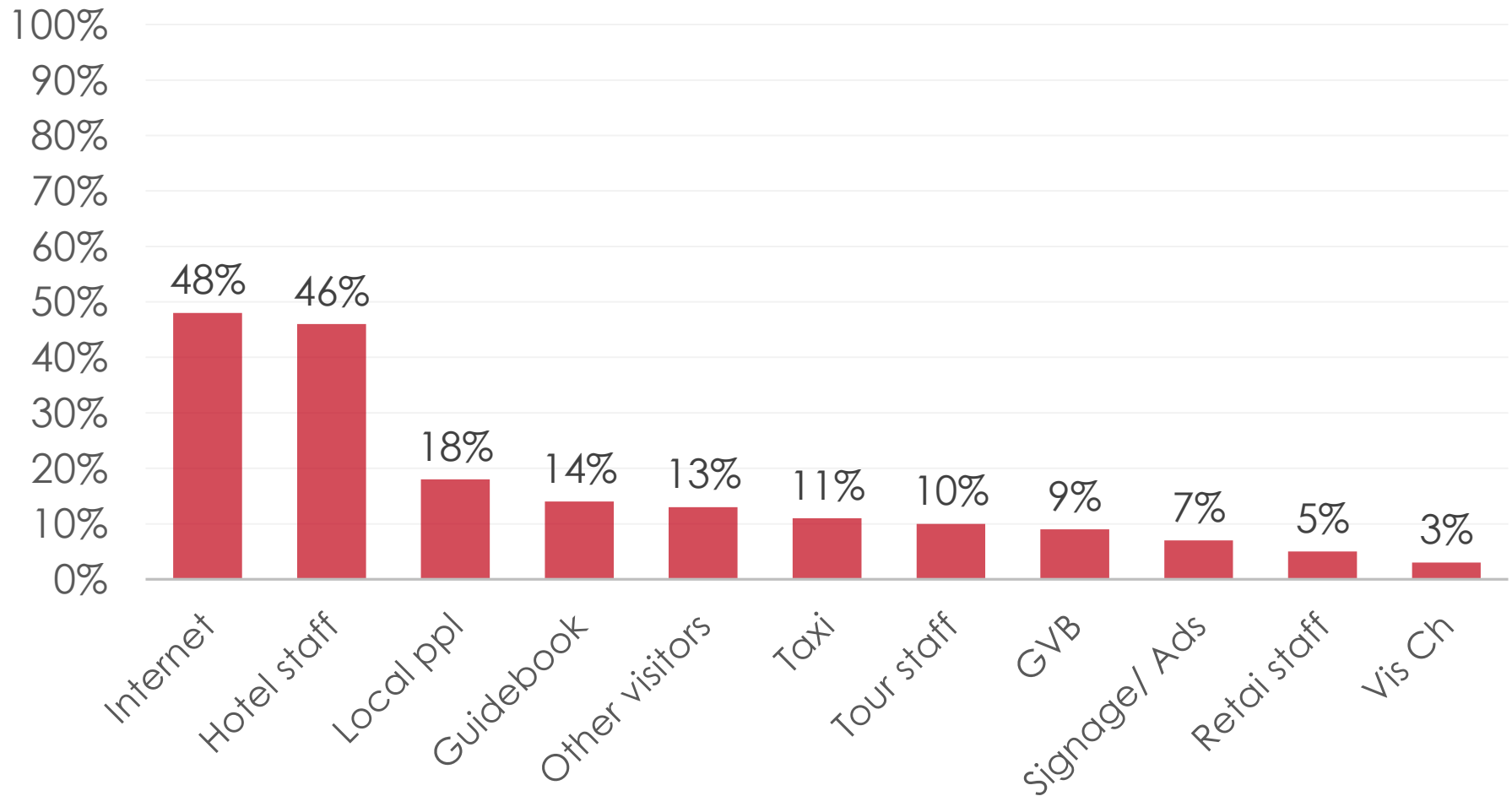
PRE-ARRIVAL

SOURCES OF INFORMATION (Top 3)

| FY2012 | FY2013 | FY2014 | FY2017 | FY2018 |
|--|--|---|---|--|
| 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 | 78% Internet/ App 40% Recom 10% TV/ Brochure |

ONISLE

SOURCES OF INFORMATION



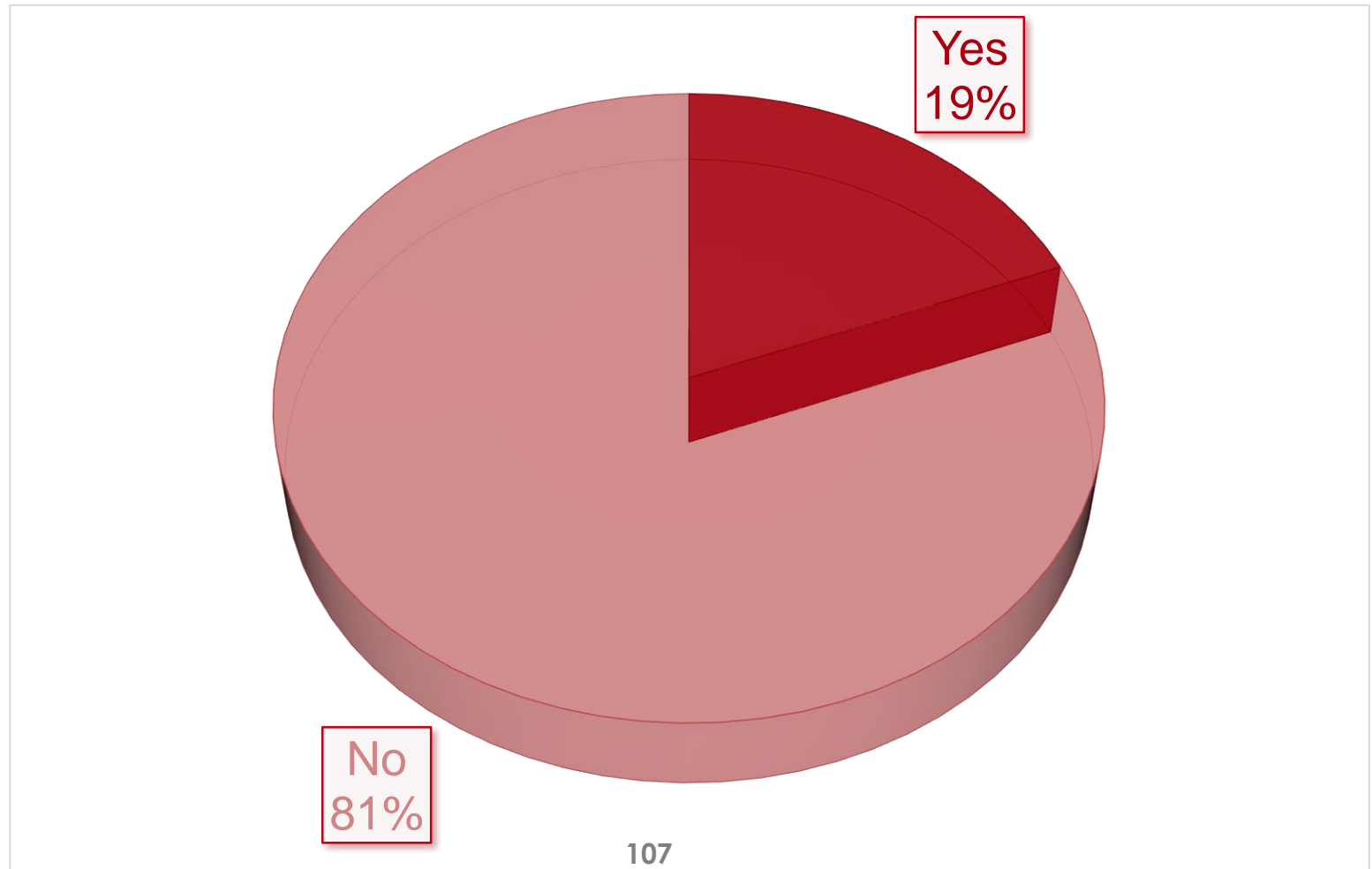
ON-ISLE SOURCES OF INFORMATION

| FY2012 | FY2013 | FY2014 | FY2017 | FY2018 |
|---|---|---|---|--|
| 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 | 48% Internet/ App 46% Hotel staff 18% Local ppl |

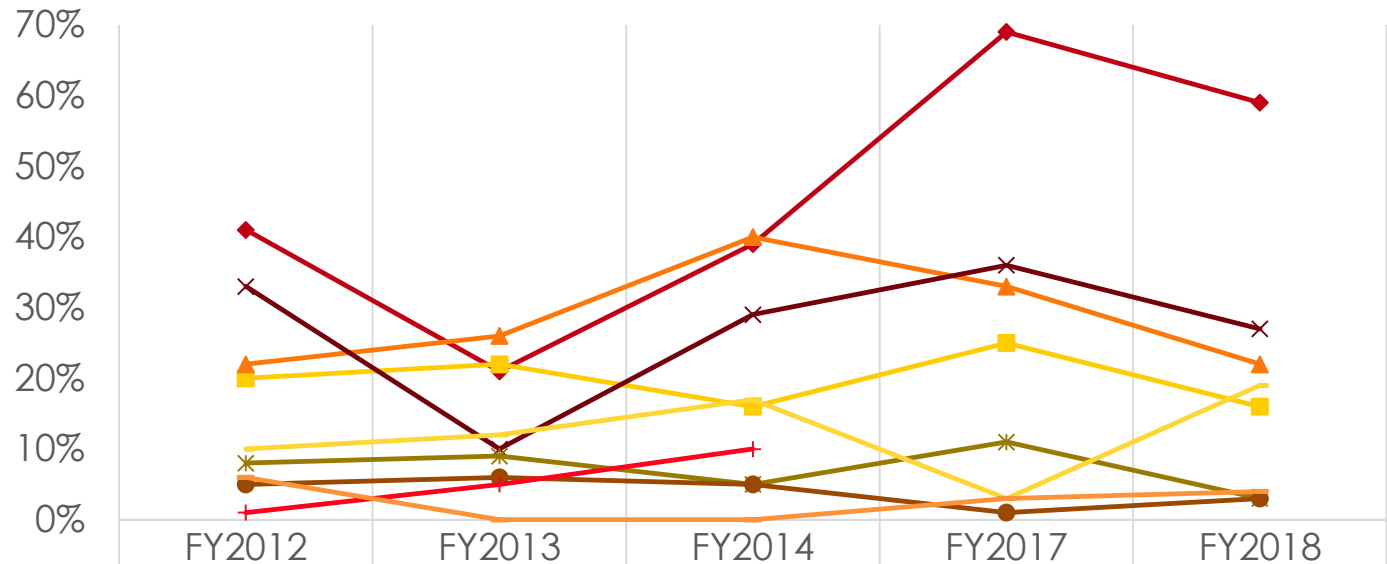
SECTION 6

FUTURE TRAVEL TO GUAM

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

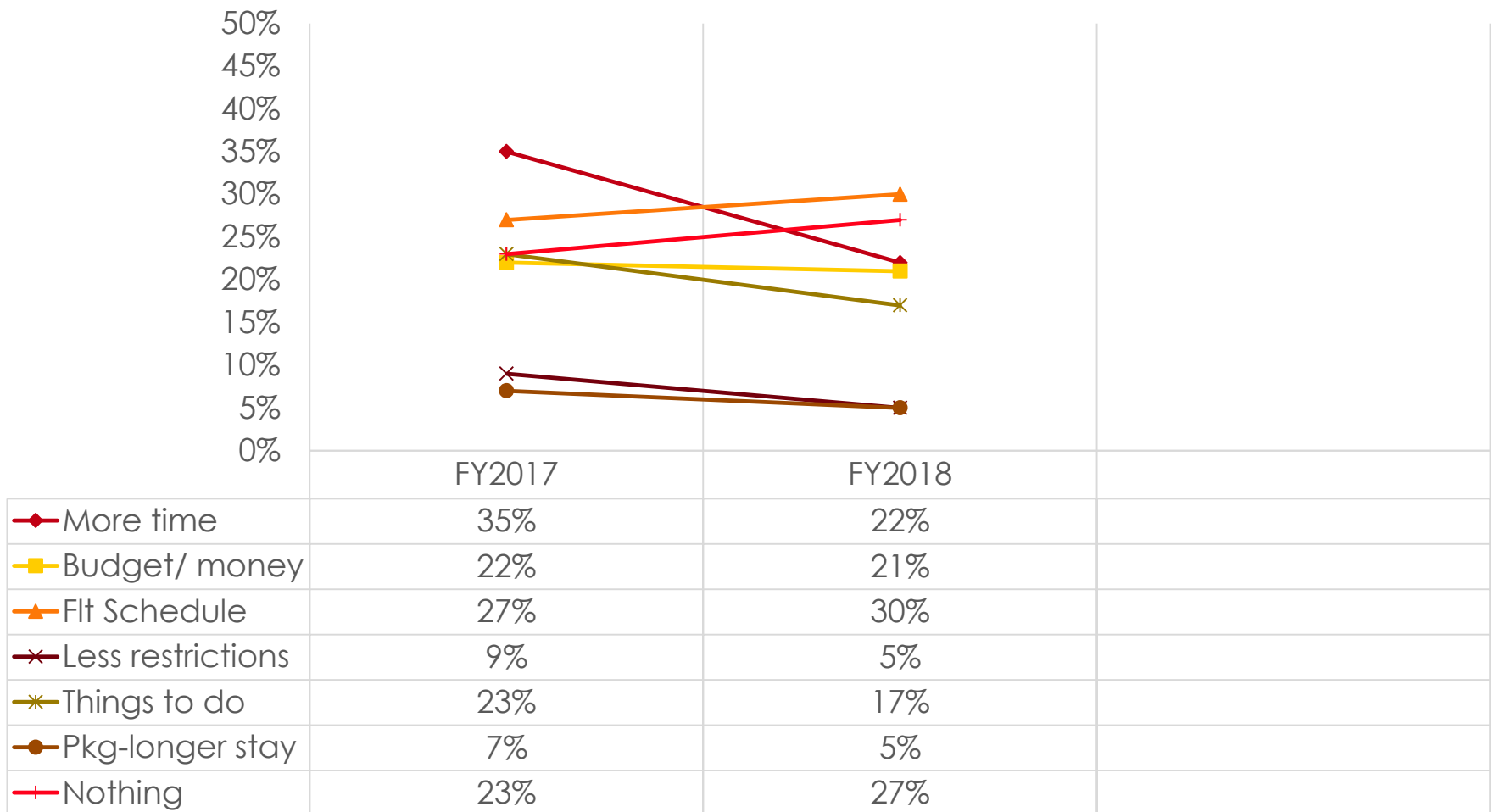


FUTURE TRAVEL CONCERNS



| | | | | | |
|------------------------|-----|-----|-----|-----|-----|
| ◆ Safety | 41% | 21% | 39% | 69% | 59% |
| ■ Terrorism | 20% | 22% | 16% | 25% | 16% |
| ▲ Food | 22% | 26% | 40% | 33% | 22% |
| ✕ Expense | 33% | 10% | 29% | 36% | 27% |
| * Discrimination | 8% | 9% | 5% | 11% | 3% |
| ● Should spend at home | 5% | 6% | 5% | 1% | 3% |
| + Other | 1% | 5% | 10% | | |
| — Don't know | 10% | 12% | 17% | 3% | 19% |
| — No concerns | 6% | 0% | 0% | 3% | 4% |

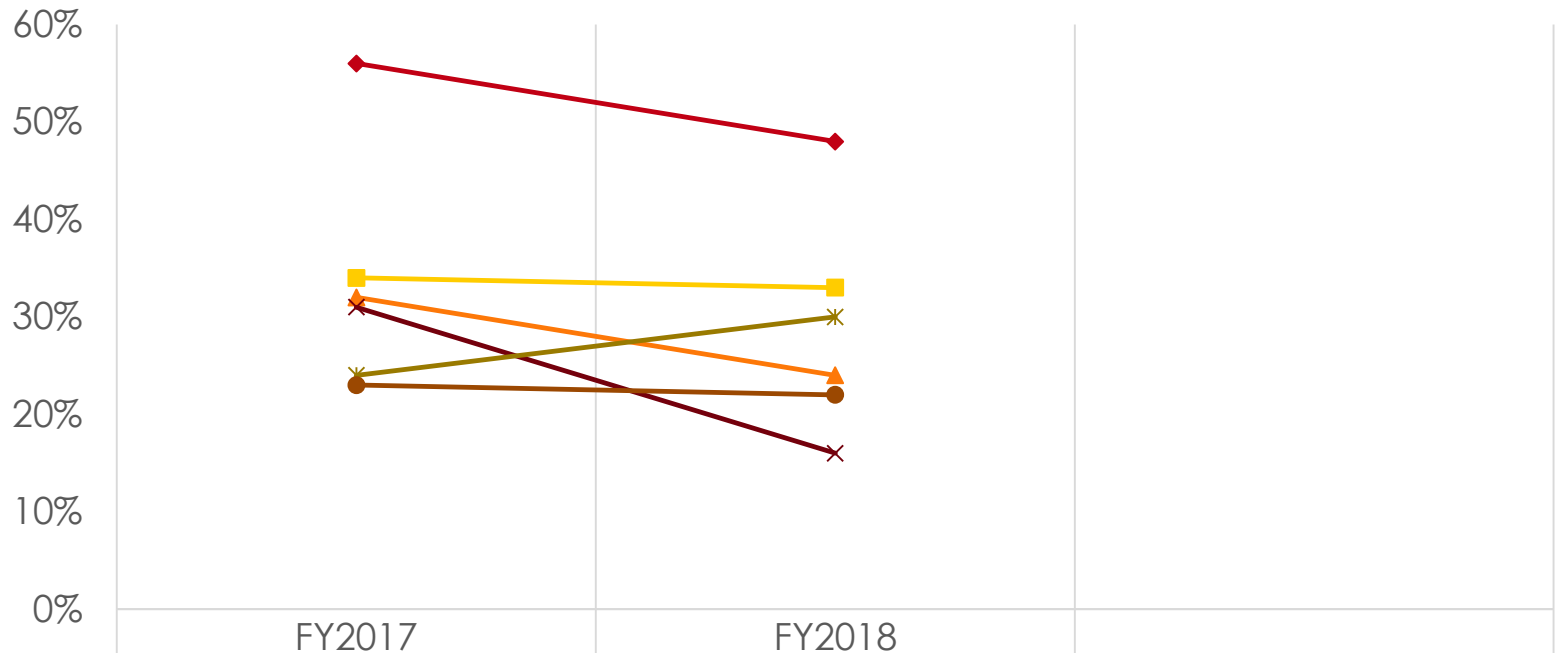
What would it take to make you stay an extra day on Guam?



SECTION 7

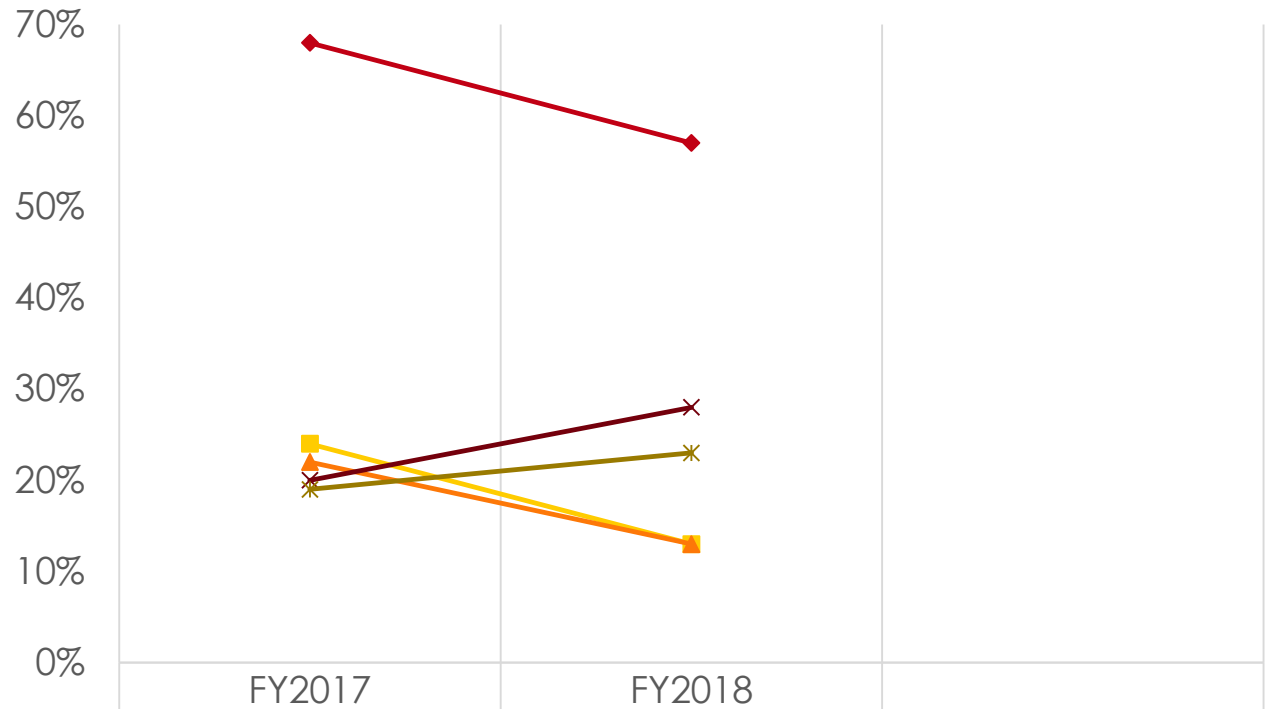
GUAM CULTURE

EXPERIENCED - CHAMORRO/ HAFA ADAI SPIRIT



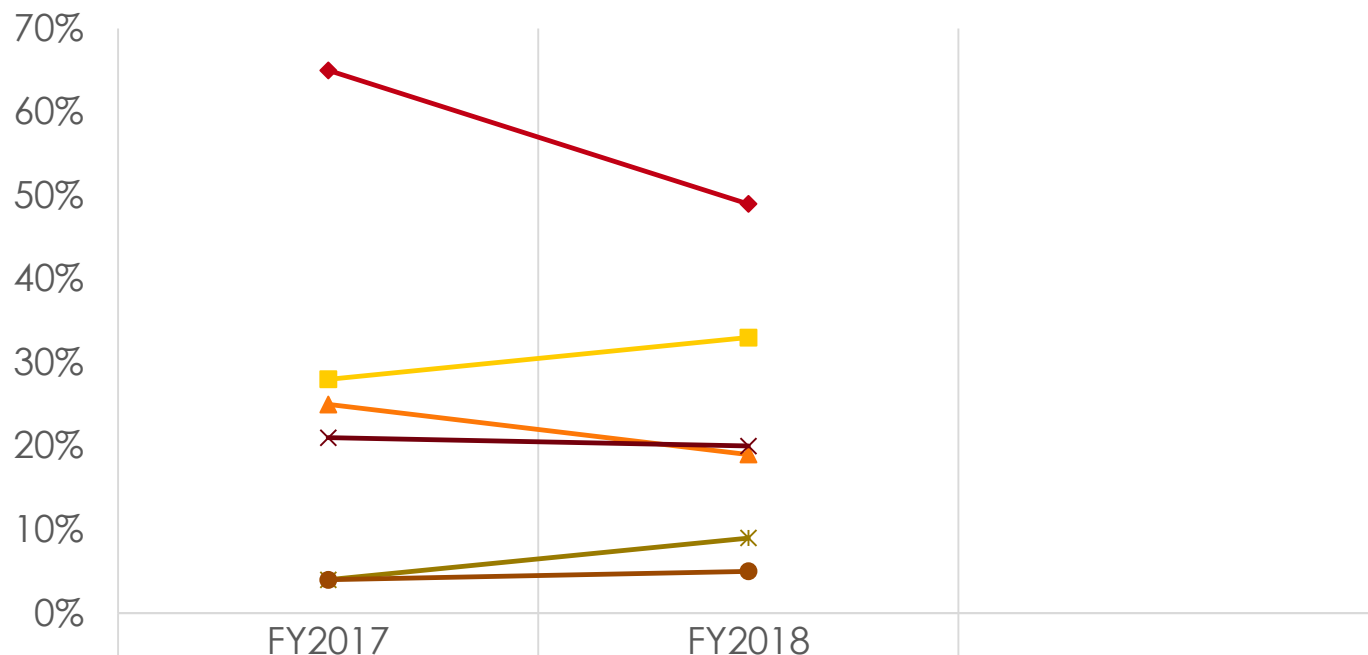
| | | | |
|----------------|-----|-----|--|
| ◆ Beaches | 56% | 48% | |
| ■ Local music | 34% | 33% | |
| ▲ Local people | 32% | 24% | |
| ✕ Night market | 31% | 16% | |
| * None | 24% | 30% | |
| ● Local food | 23% | 22% | |

EXPERIENCED - OTHER CULTURAL ACTIVITY/EVENTS



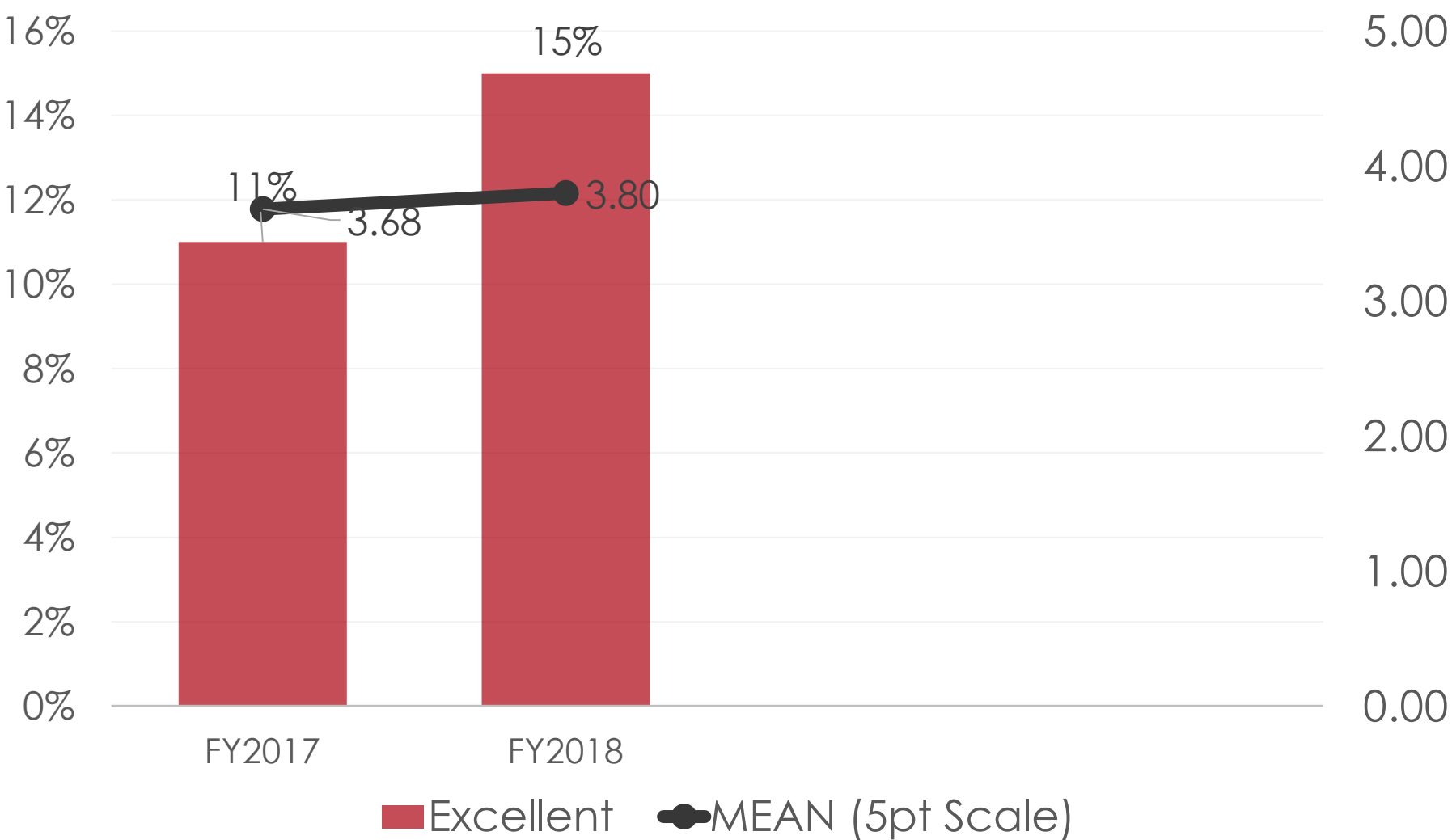
| | | | |
|-------------------------------|-----|-----|--|
| ◆ 2-Lovers Pt | 68% | 57% | |
| ■ Chamorro Cult Entertainment | 24% | 13% | |
| ▲ Chamorro Village | 22% | 13% | |
| × None | 20% | 28% | |
| * Guam Museum | 19% | 23% | |

SOURCES OF INFORMATION - CULTURAL ACTIVITY/EVENTS

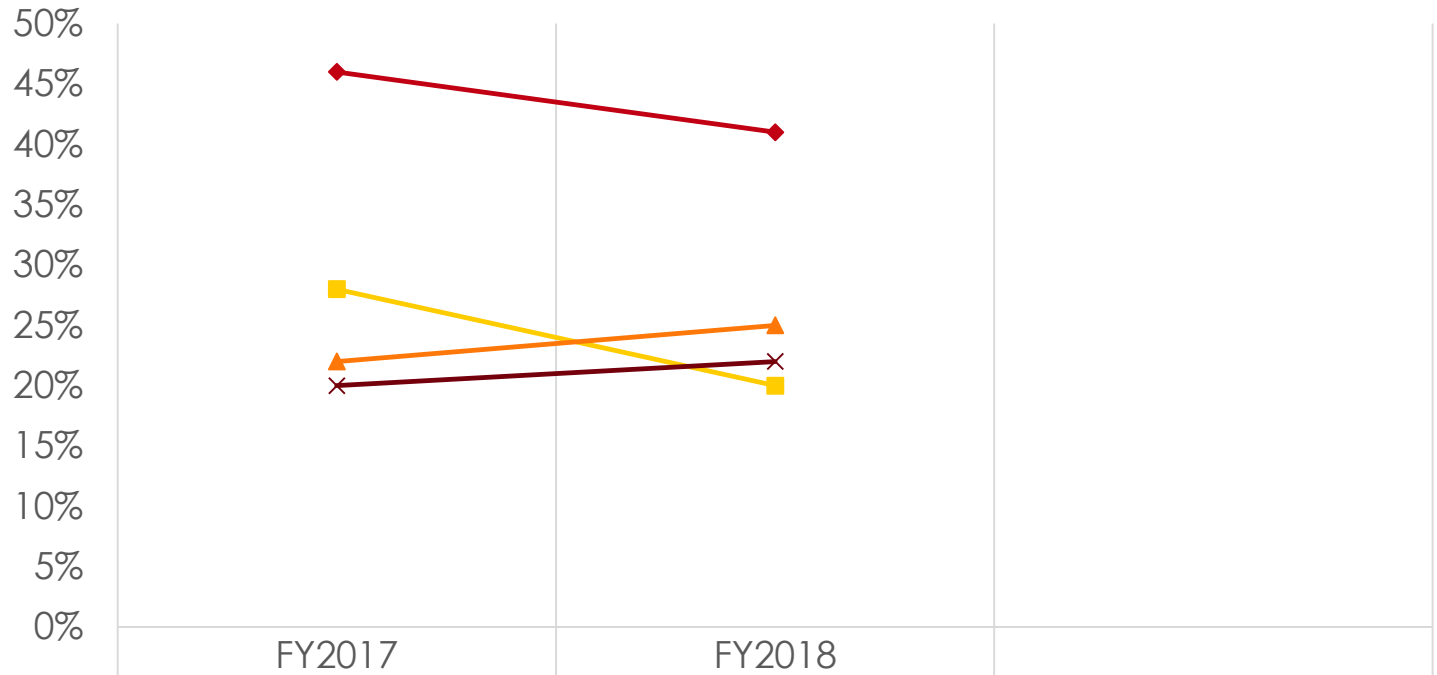


| | | | |
|-----------------------|-----|-----|--|
| ◆ Internet | 65% | 49% | |
| ■ Travel agency | 28% | 33% | |
| ▲ Guides/ Brochures | 25% | 19% | |
| ✕ Family/ friends | 21% | 20% | |
| * Hotel staff | 4% | 9% | |
| ● Newspaper/ Magazine | 4% | 5% | |

SATISFACTION - CULTURAL ACTIVITY/EVENTS



OBSTACLES- CULTURAL ACTIVITY/EVENTS



| | | | |
|----------------------|-----|-----|--|
| ◆ Scheduling | 46% | 41% | |
| ■ Did not know where | 28% | 20% | |
| ▲ Unaware | 22% | 25% | |
| ✕ Did not want to | 20% | 22% | |

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 2018 | |
|---|------------------------|
| Drivers: | Annual 2018 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 | |
| Variety of shopping | |
| Price of things on Guam | |
| Quality of hotel accommodations | 2 |
| Quality/cleanliness of air, sky | 3 |
| Quality/cleanliness of parks | |
| Quality of landscape in Tumon | |
| Quality of landscape in Guam | |
| Quality of ground handler | |
| Quality/cleanliness of transportation vehicles | 4 |
| % of Per Person On Island Expenditures Accounted For | 58.7% |
| NOTE: Only significant drivers are included. | |

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Hong Kong visitor's experience on Guam is driven by four significant factors in the FY2018 Period. By rank order they are:
 - **Quality of day time tours,**
 - **Quality of hotel accommodations,**
 - **Quality/cleanliness of air, sky, and**
 - **Quality/cleanliness of transportation vehicles.**
- With all four factors the overall r^2 is .587 meaning that **58.7% 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 2018 | |
|--|------------------|
| Drivers: | Annual 2018 rank |
| Quality & Cleanliness of beaches & parks | |
| Ease of getting around | 2 |
| Safety walking around at night | 4 |
| Quality of daytime tours | |
| Variety of daytime tours | |
| Quality of nighttime tours | 3 |
| 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 | 1 |
| 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 | 7.6% |
| 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 four significant factors in the FY2018 Period. By rank order they are:
 - **Quality/cleanliness of parks,**
 - **Ease of getting around,**
 - **Quality of night time tours, and**
 - **Safety walking around at night.**
- With all four factors the overall r^2 is .076 meaning that **7.6% of per person on island expenditure is accounted for by these factors.**