Guam Visitors Bureau

Hong Kong Visitor Tracker Exit Profile & Market Segmentation Report

FY2019

QTR.1 (OCT-DEC. 2018)

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 **107** 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 **107** is +/- 9.34 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 +/- 9.34 percentage points.

Objectives

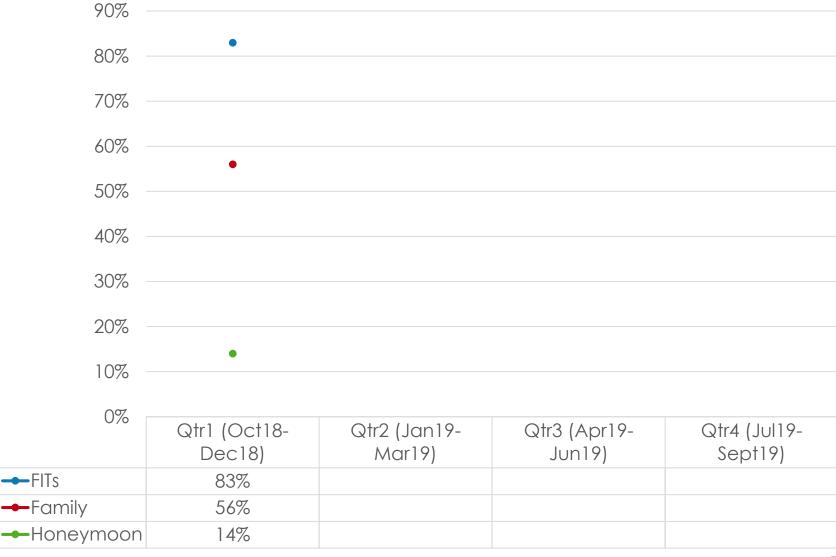
- To monitor the effectiveness of the Hong Kong seasonal campaigns in attracting Hong Kong visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Hong Kong marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

Key Highlighted Segments

The specific objectives were:

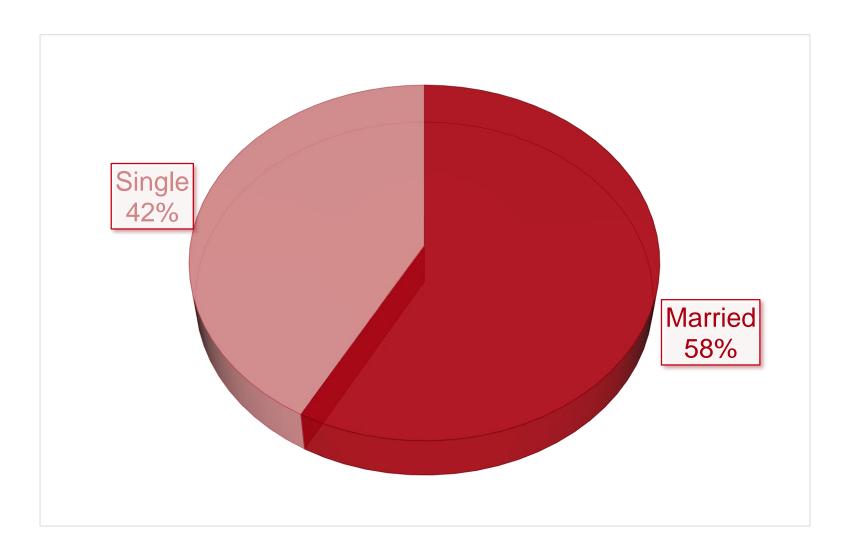
- To determine the relative size and expenditure behavior of the following market segments:
 - FITs (Q7)
 - Honeymoon (Q5A)
 - Family (Q6)
- To identify the most significant factors affecting overall visitor satisfaction.
- To identify (for all Chinese visitors) the most important determinants of on-island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

Key Highlighted Segments

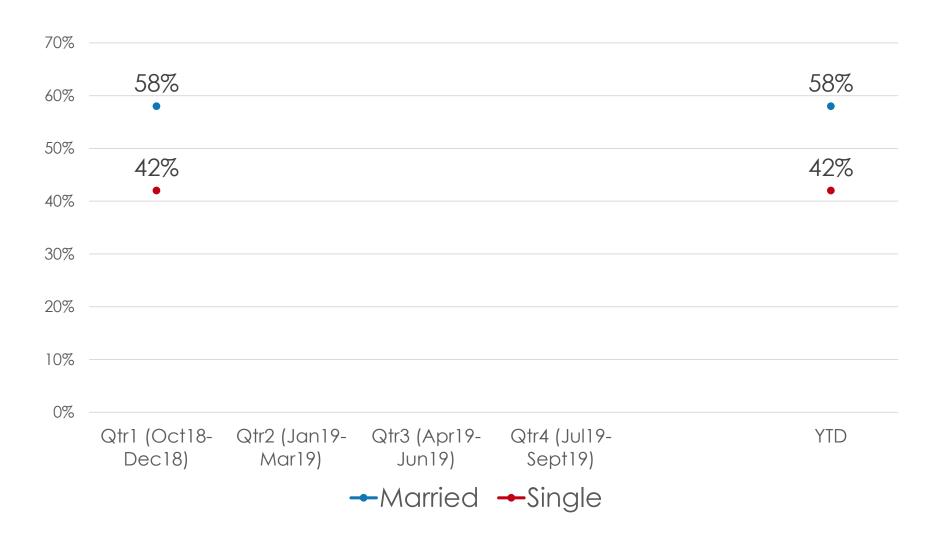


SECTION 1 PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2019 Tracking





Marital status – Key Segments

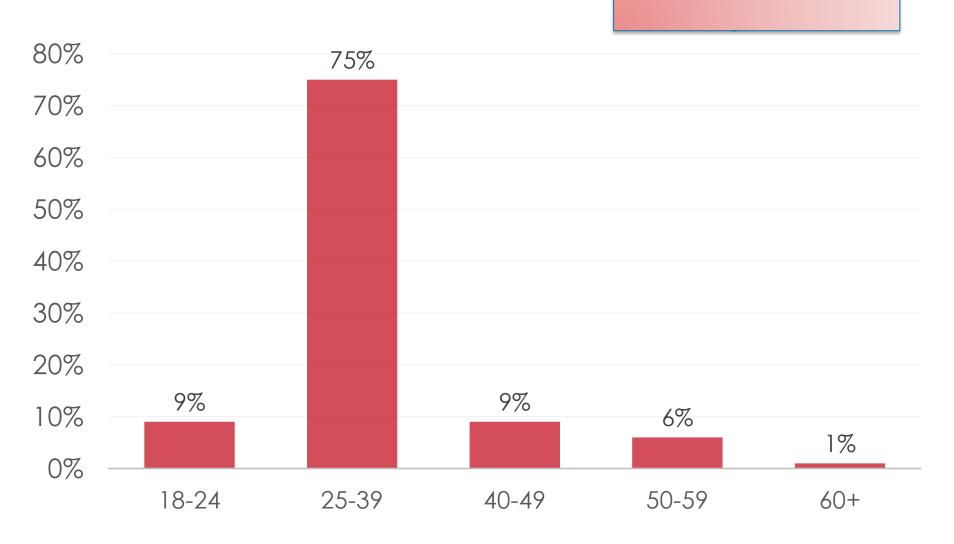
GVB EXIT SURVEY QE MARITAL STATUS

		TOTAL	FIT	FAMILY	HONEYMOO N
		273		85	373
QE	Married	58%	57%	83%	100%
	Single	42%	43%	17%	
	Total	107	89	60	15

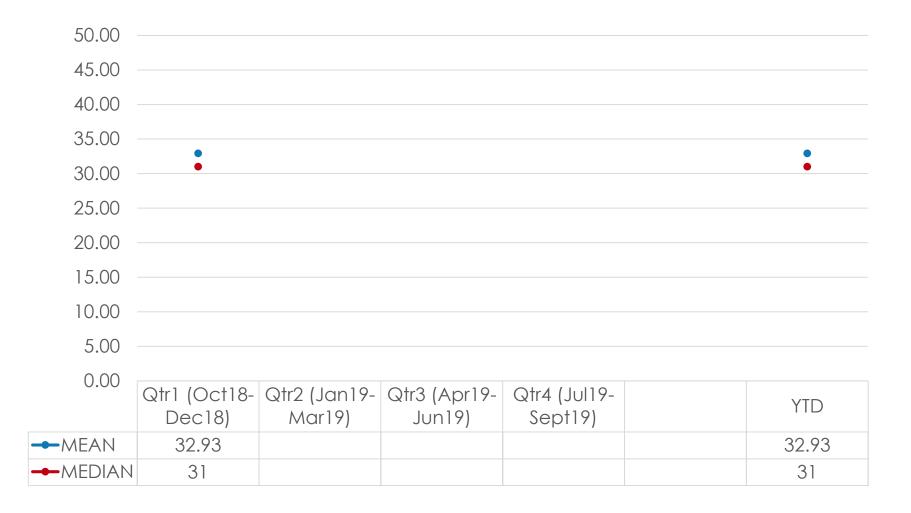
Prepared by Anthology Research

Age

MEAN = 32.93 MEDIAN = 31



Age - FY2019 Tracking



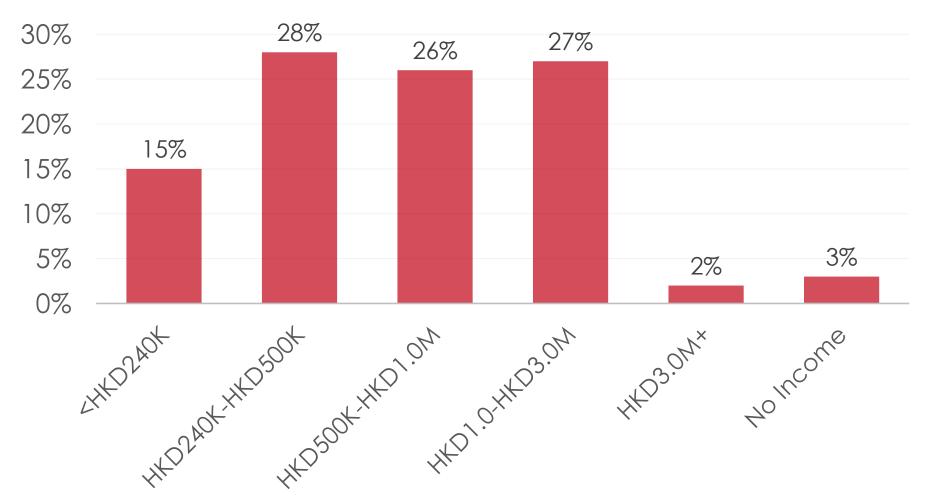
Age – Key Segments

GVB EXIT SURVEY AGE

		TOTAL	FIT	FAMILY	HONEYMOO N
		373	-	15	27
SD	18-24	9%	10%	7%	13%
	25-39	75%	78%	77%	87%
	40-49	9%	7%	10%	
	50-59	6%	4%	7%	
	60+	1%	1%		
	Total	107	89	60	15
SD	Mean	32.93	32.16	33.40	29.27
	Median	31	31	32	29

Prepared by Anthology Research

Annual Household Income



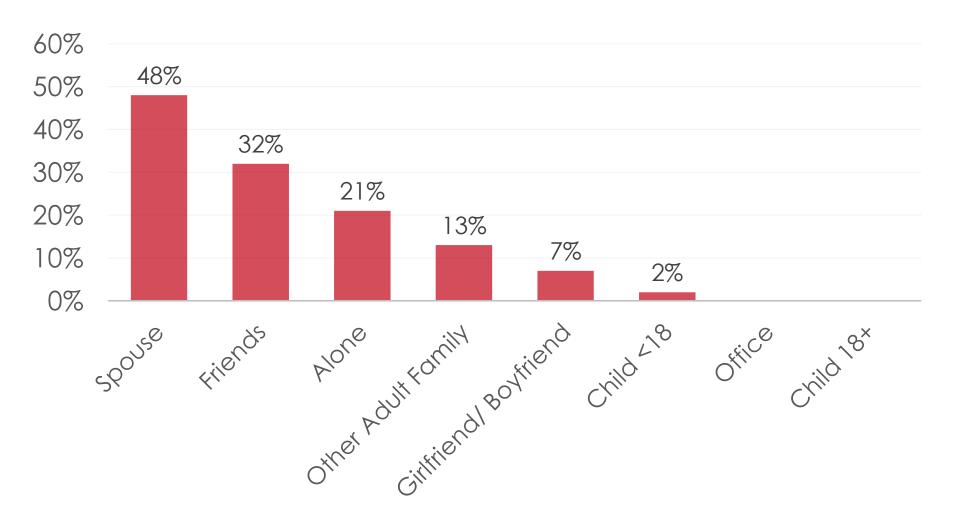
Annual Household Income – Key Segments

GVB EXIT SURVEY Q26 Household income:

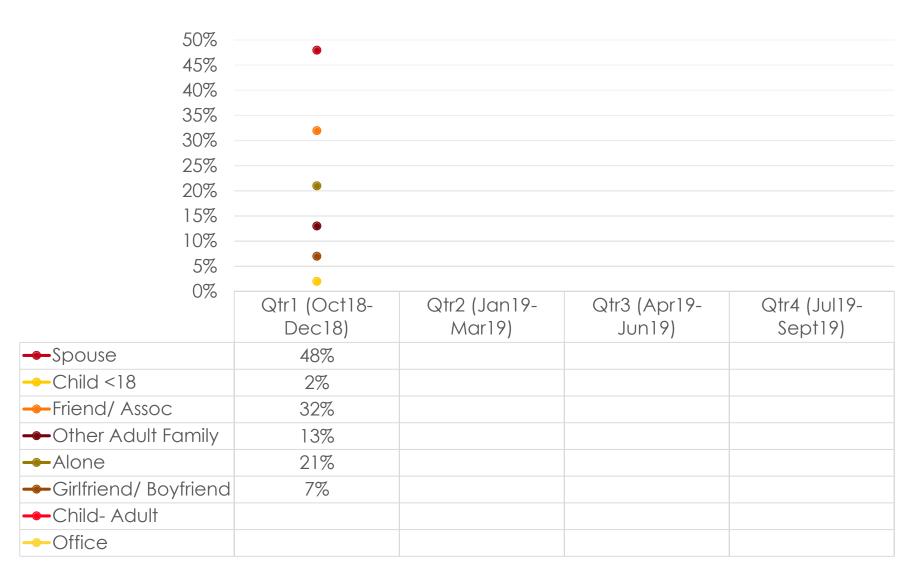
		TOTAL -	FIT	FAMILY	HONEYMOO N
			15	353	
Q26	<hkd120k< td=""><td>6%</td><td>6%</td><td>7%</td><td>7%</td></hkd120k<>	6%	6%	7%	7%
	HKD120K-HKD240K	9%	10%	7%	7%
	HKD240K-HKD500K	28%	30%	24%	36%
	HKD500K-HKD1.0M	26%	22%	24%	14%
	HKD1.0M-HKD2.0M	23%	22%	31%	14%
	HKD2.0M-HKD3.0M	4%	3%	2%	7%
	HKD3.0M+	2%	2%	2%	
	No Income	3%	3%	3%	14%
	Total	104	86	58	14

Prepared by Anthology Research

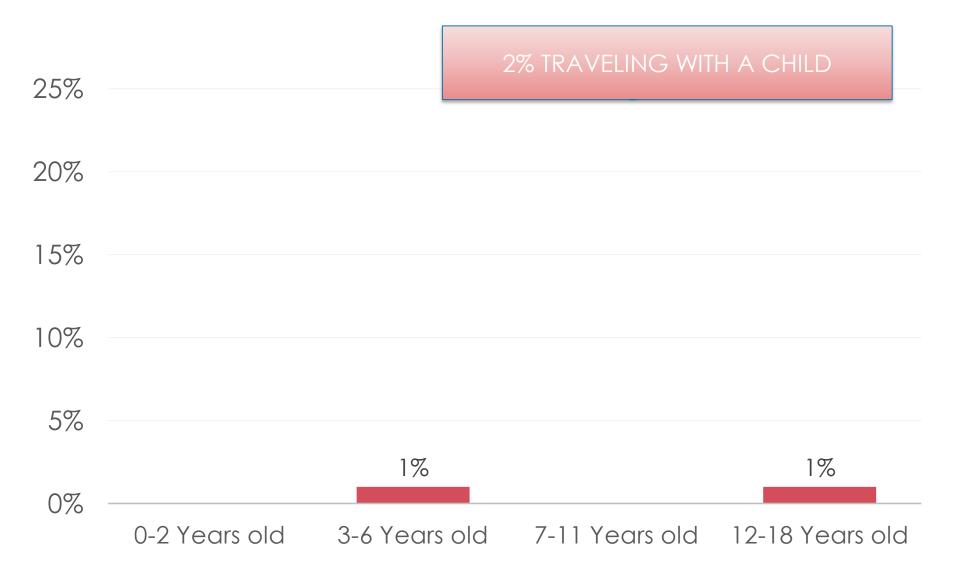
Travel Party



Travel Party

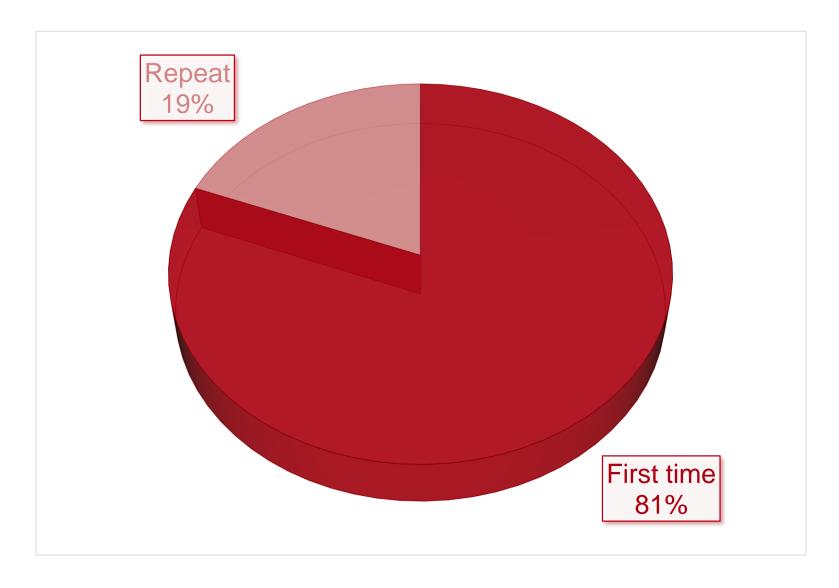


Travel Party - Children



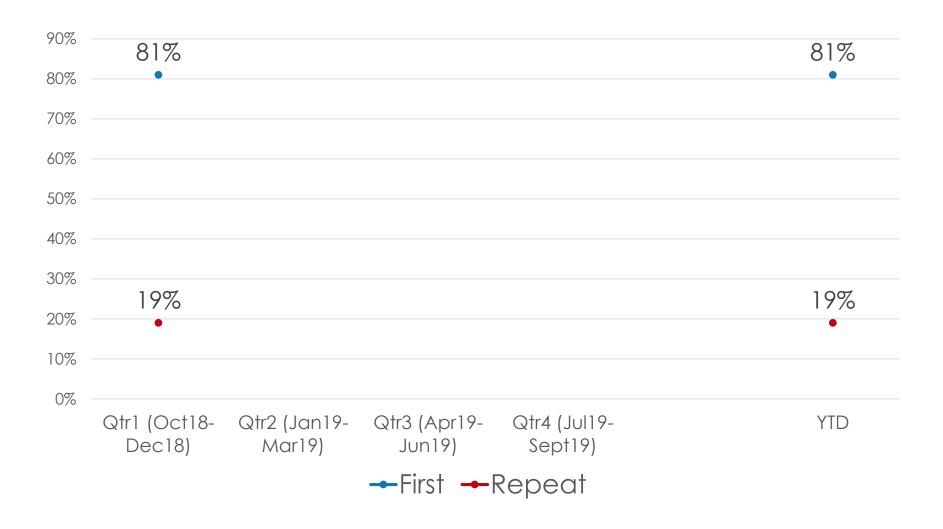


Trips to Guam





Trips to Guam – FY2019 Tracking





Trips to Guam – Key Segments

GVB EXIT SURVEY

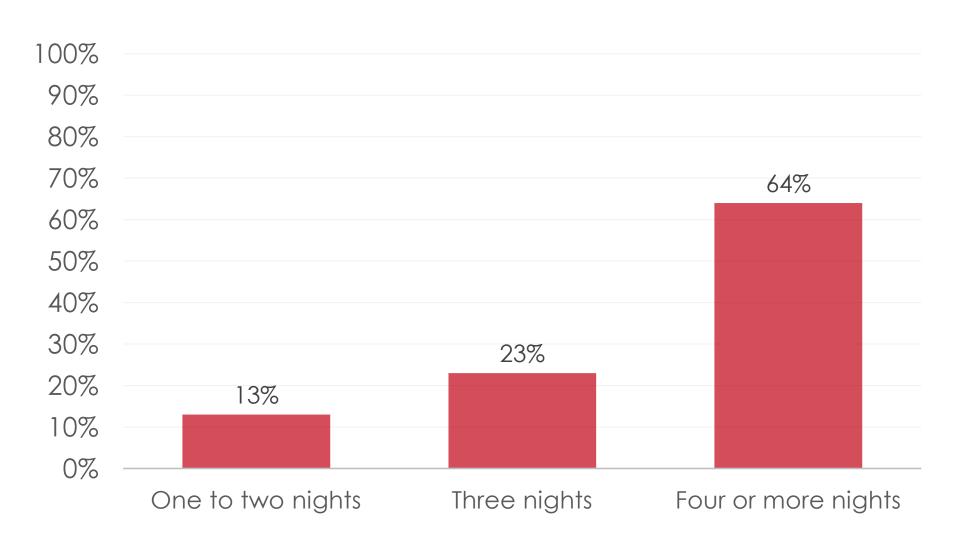
Q3 Including this trip, how many times have you visited Guam?

		TOTAL	FIT	FAMILY	HONEYMOO N
		353	-	15	1.00
Q3	1 st Time	81%	82%	77%	87%
	Repeat	19%	18%	23%	13%
	Total	107	89	60	15
Q3A	Mean	1.35	1.36	1.40	1.13
	Median	1	1	1	1

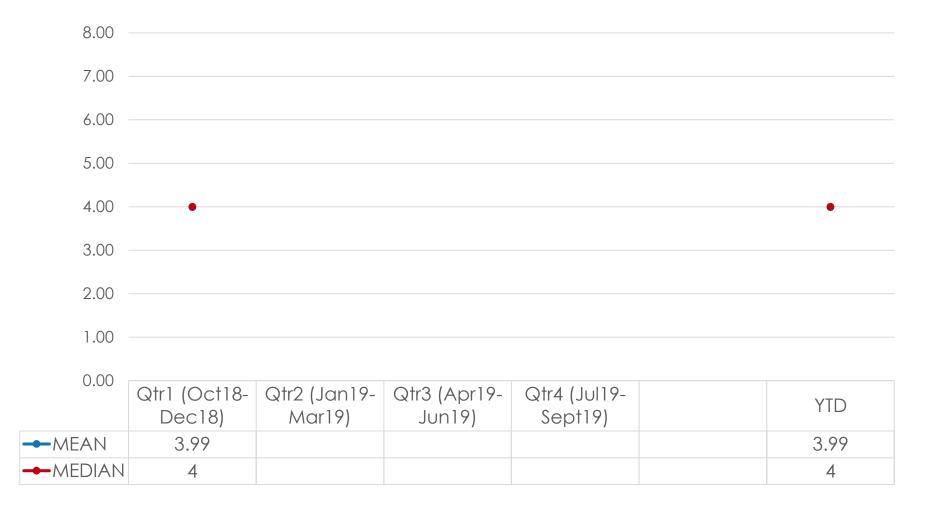
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Length of Stay

MEAN NUMBER OF NIGHTS = 3.99 MEDIAN NUMBER OF NIGHTS = 4



Length of Stay – FY2019 Tracking



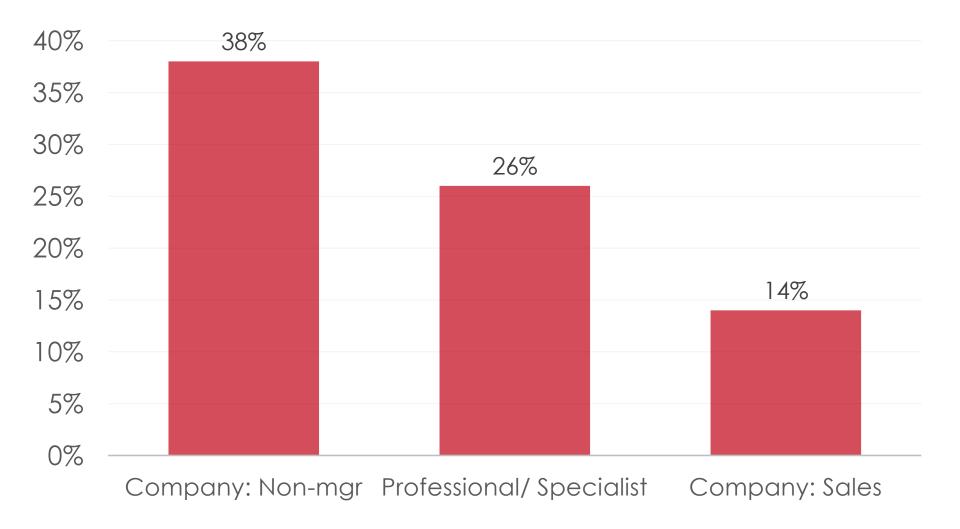
Length of Stay – Key Segments

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

		TOTAL	FIT	FAMILY	HONEYMOO N
		15	273	- BX	5
SA	1-2	13%	13%	12%	13%
	3	23%	16%	22%	
	4+	64%	71%	67%	87%
	Total	107	89	60	15
SA	Mean	3.99	4.13	4.15	5.07
	Median	4	4	4	5

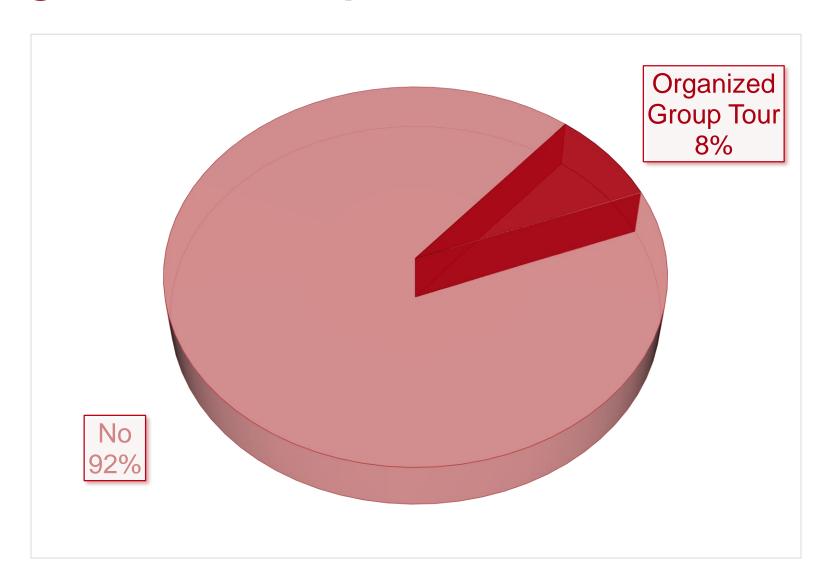
Prepared by Anthology Research

Occupation – Top Responses (10%+)

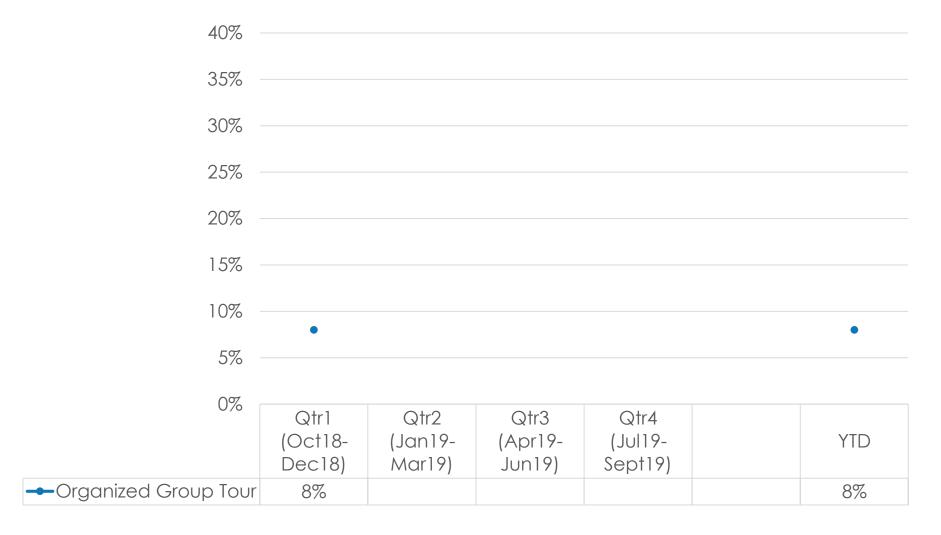


SECTION 2 TRAVEL PLANNING

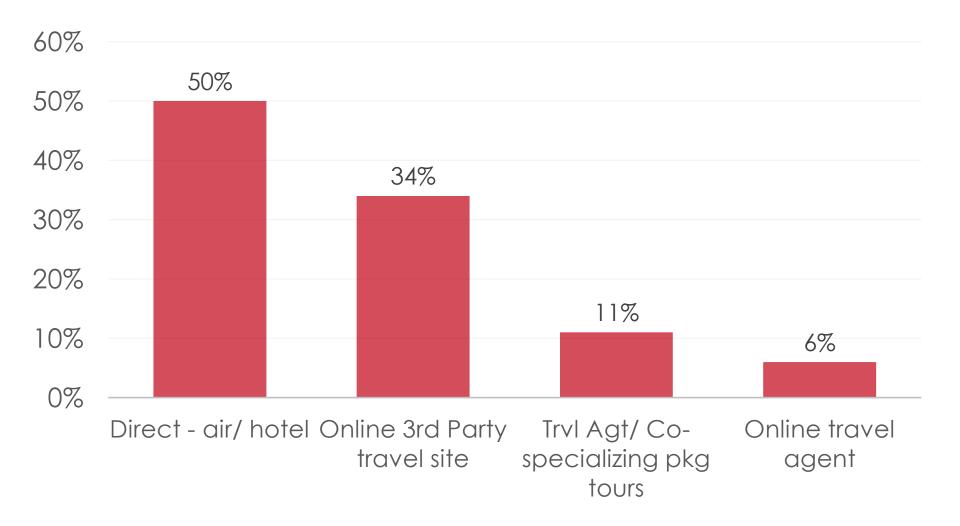
Organized Group Tour



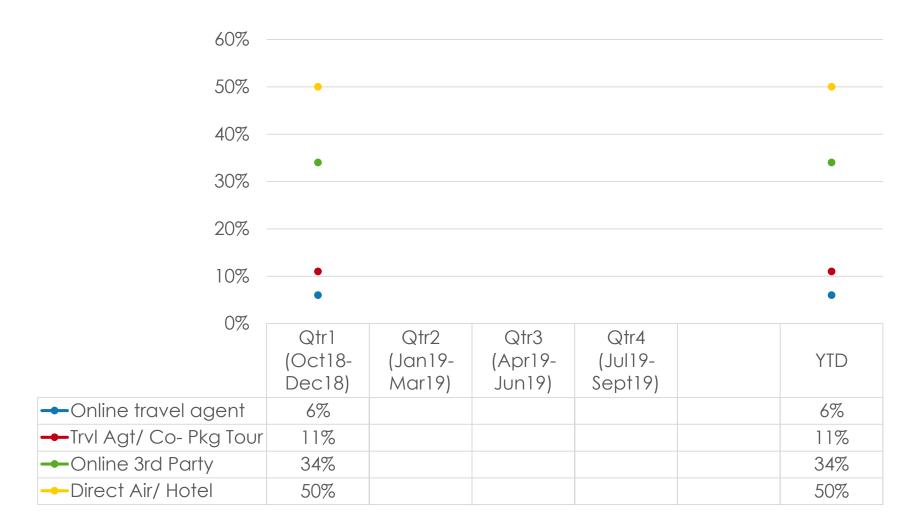
Organized Group Tour-Tracking



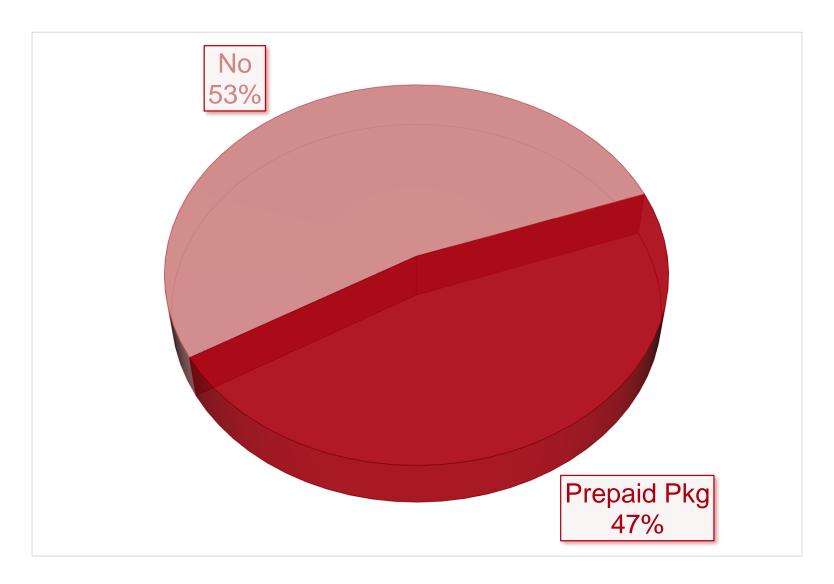
Travel Arrangements- Sources



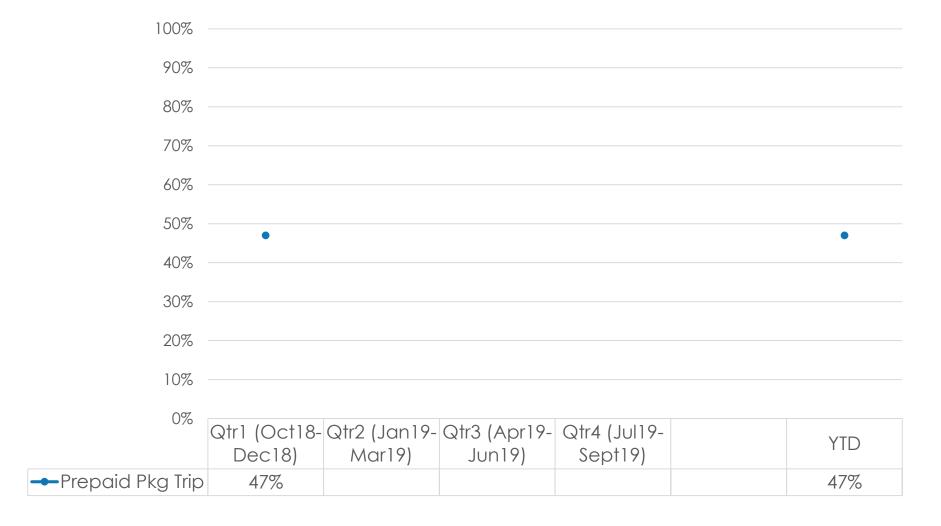
Travel Arrangements- Sources



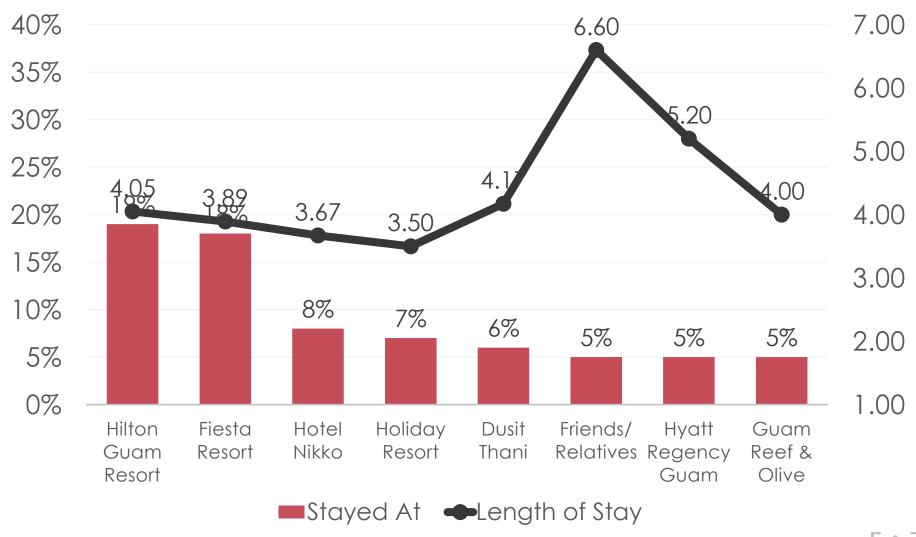
Prepaid Pkg Trip



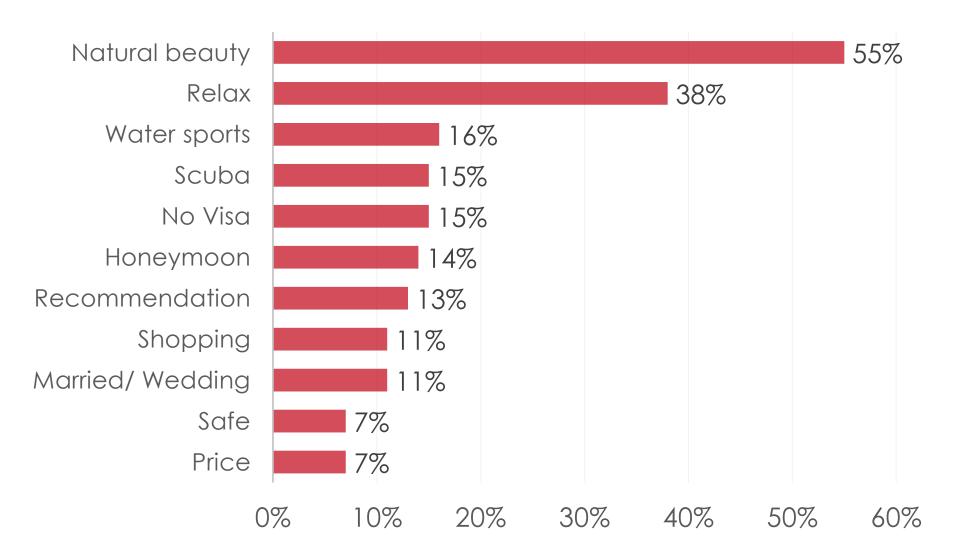
Prepaid Pkg Trip



Accommodations (Top Responses/ 5%+)



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	HONEYMOO N
		8	3753	. 8	8
Q5A	Beautiful seas, beaches, tropical climate	55%	57%	53%	67%
	Just to relax	38%	37%	32%	13%
	Water sports (snorkeling, windsurfing, parasailing)	16%	18%	12%	20%
	Scuba diving	15%	15%	15%	27%
	No Visa	15%	15%	17%	7%
	Honeymoon	14%	17%	25%	100%
	Recommendation of friend/ relative/ travel agency	13%	13%	10%	
	Shopping	11%	10%	12%	
	To Get Married/ attend Wedding	11%	11%	15%	20%
	Price of the tour package	7%	4%	8%	7%
	It is a safe place to spend a vacation	7%	6%	7%	7%
	A previous visit	5%	3%	8%	
	Pleasure/ vacation	5%	4%	5%	13%
	To visit friends or relatives	4%	4%	3%	
	Short travel time (not too far from home)	4%	1%	3%	
	Career certification/ testing	4%	4%	2%	
	Company/ business trip	2%	2%		
	Organized sporting activity/ event	2%	1%	2%	
	Adventure	1%	1%		
	Total	107	89	60	1.5

Prepared by Anthology Research



SECTION 3 EXPENDITURES

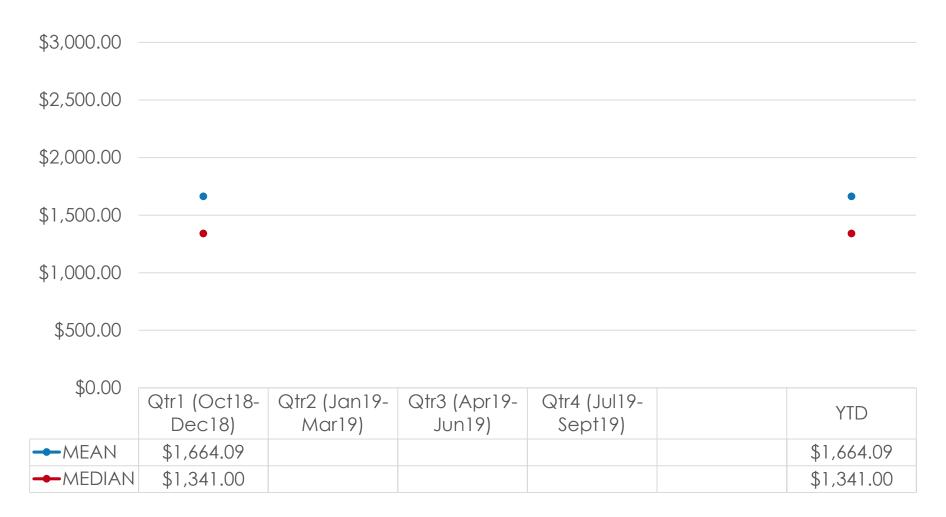
Prepaid Expenditures

EXCHANGE RATE HKD 7.83=\$1

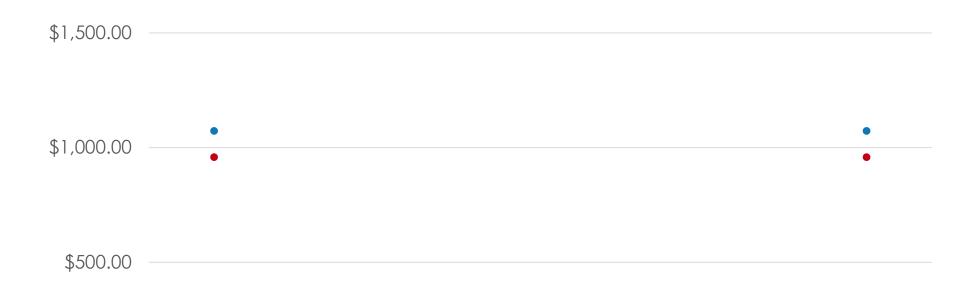
• \$1,664.09 = overall mean average prepaid expense (for entire travel party size) by respondent

 \$1,072.68 = overall mean average <u>per person</u> prepaid expenditures

Prepaid Entire Travel Party – FY2019 Tracking



Prepaid Per Person-FY2019 Tracking



\$0.00	Qtr1 (Oct18- Dec18)	Qtr2 (Jan19- Mar19)	Qtr3 (Apr19- Jun19)	Qtr4 (Jul19- Sept19)	YTD
→ MEAN	\$1,072.68	7.1.0.1.7.7	331117	3381171	\$1,072.68
→ MEDIAN	\$958.00				\$958.00

Prepaid Per Person– Key Segments

GVB EXIT SURVEY Q10A PREPAID - PER PERSON:

		TOTAL	FIT	FAMILY	HONEYMOO N
		15	25	327.0	15
PREPAID PP	Mean	\$1,072.68	\$1,081.97	\$1,108.52	\$1,188.21
	Median	\$958	\$990	\$958	\$1,022

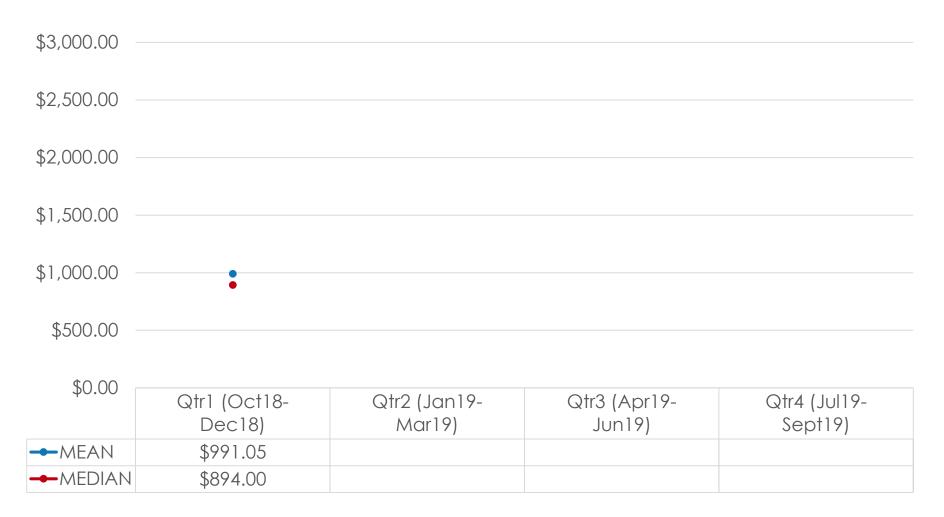
Prepared by Anthology Research

Prepaid Expenses by Category – MEAN Entire Travel Party



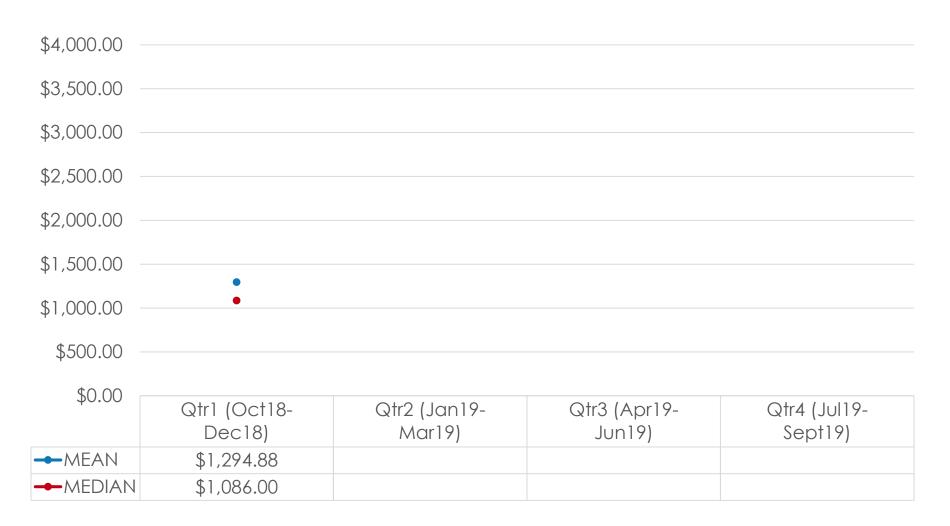
Prepaid-FY2019 Tracking

Airfare & Accommodation Packages

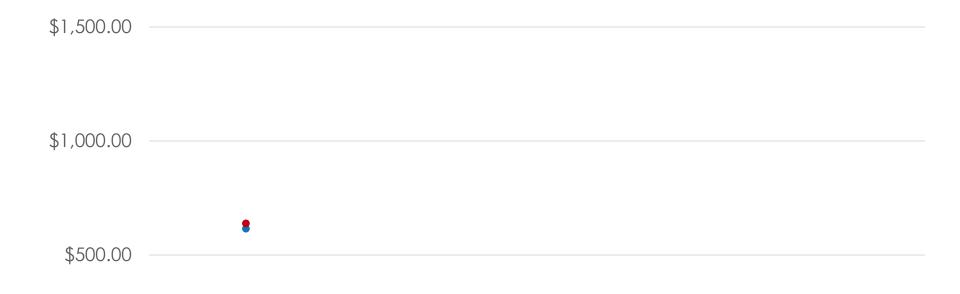


Prepaid-FY2019 Tracking

Airfare & Accommodation W/ Meal Packages



Prepaid- FY2019 Tracking Airfare Only



\$0.00	Qtr1 (Oct18- Dec18)	Qtr2 (Jan19- Mar19)	Qtr3 (Apr19- Jun19)	Qtr4 (Jul19- Sept19)
→ MEAN	\$615.66			
→ MEDIAN	\$639.00			

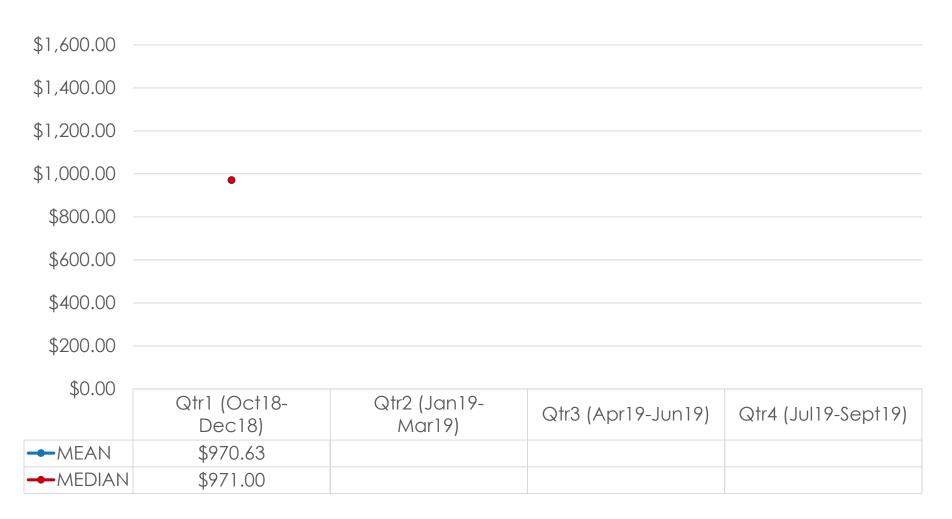
Prepaid-FY2019 Tracking

Accommodations Only

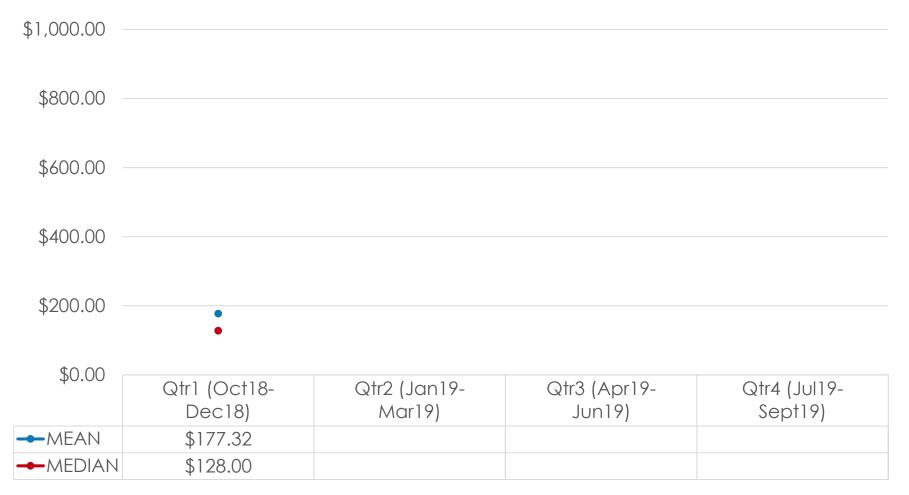
\$1,600.00				
\$1,400.00				
\$1,200.00				
\$1,000.00				
\$800.00				
\$600.00				
\$400.00	•			
\$200.00				
\$0.00	Qtr1 (Oct18- Dec18)	Qtr2 (Jan19- Mar19)	Qtr3 (Apr19- Jun19)	Qtr4 (Jul19- Sept19)
→ MEAN	\$361.02			
→ MEDIAN	\$319.00			

Prepaid-FY2019 Tracking

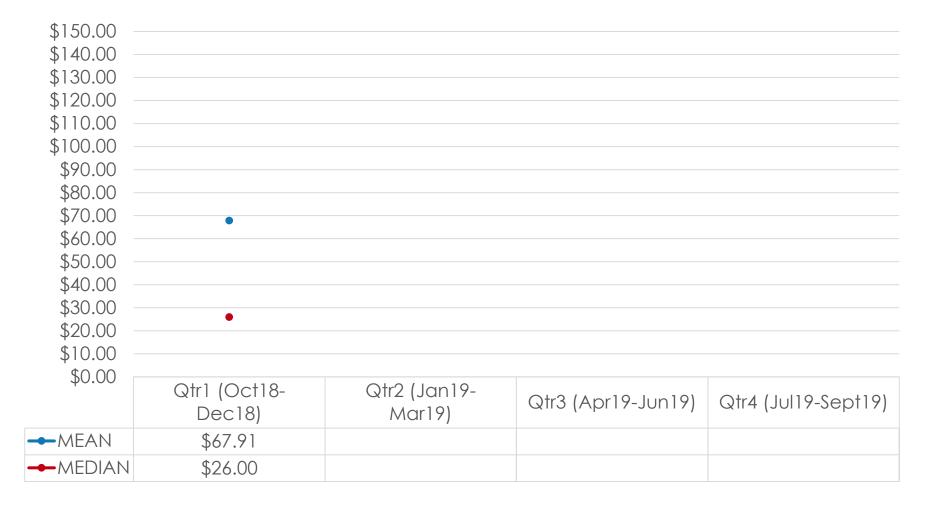
Accommodations w/ Meal Only



Prepaid - FY2019 Tracking Food & Beverage in Hotel

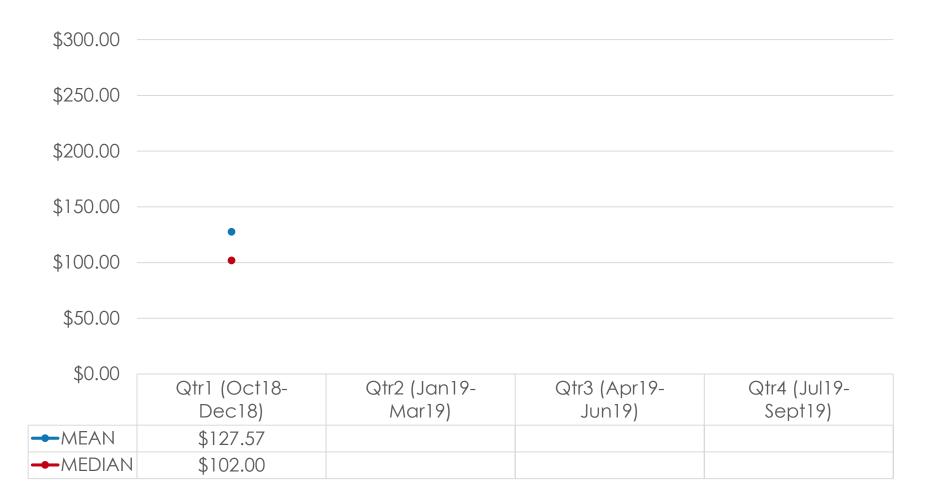


Prepaid FY2019 Tracking Ground Transportation – Hong Kong



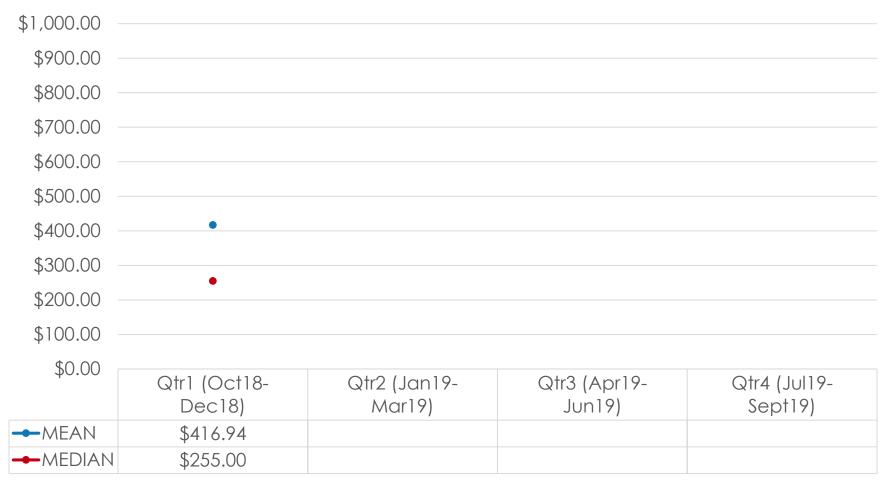
Prepaid- FY2019 Tracking

Ground Transportation - Guam



Prepaid-FY2019 Tracking

Optional tours/ Activities

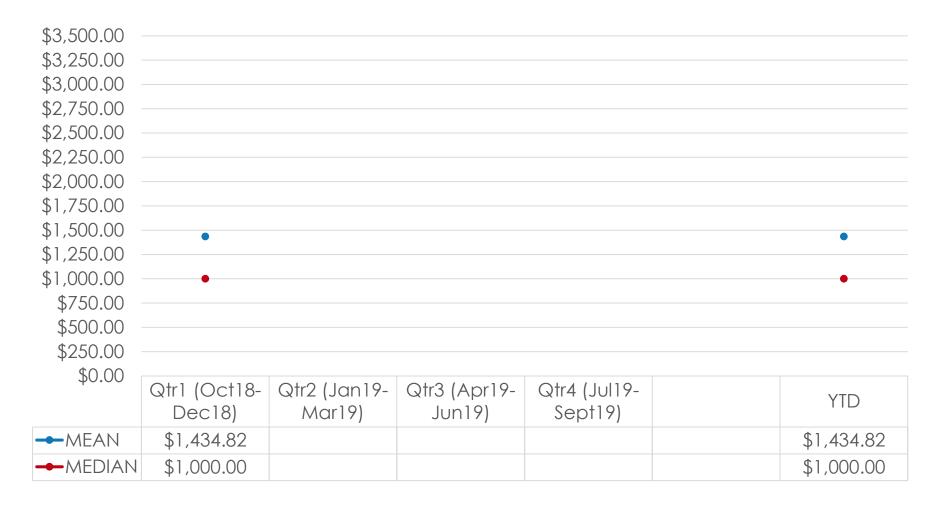


On-Island Expenditures

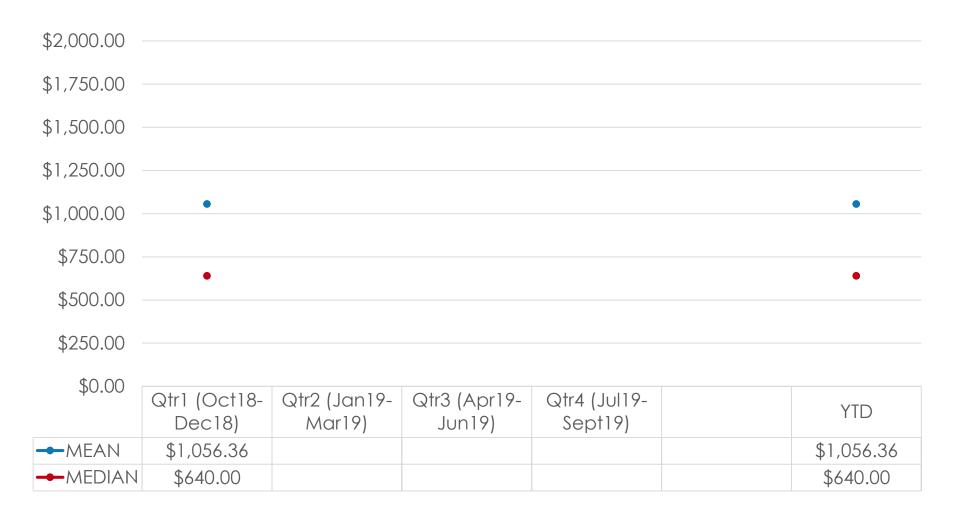
 \$1,434.82 = overall mean average on-island expense (for entire travel party size) by respondent

 \$1,056.36 = overall mean average <u>per person</u> on-island expenditures

On-Island Entire Travel Party – FY2019 Tracking



On-Island Per Person – FY2019 Tracking



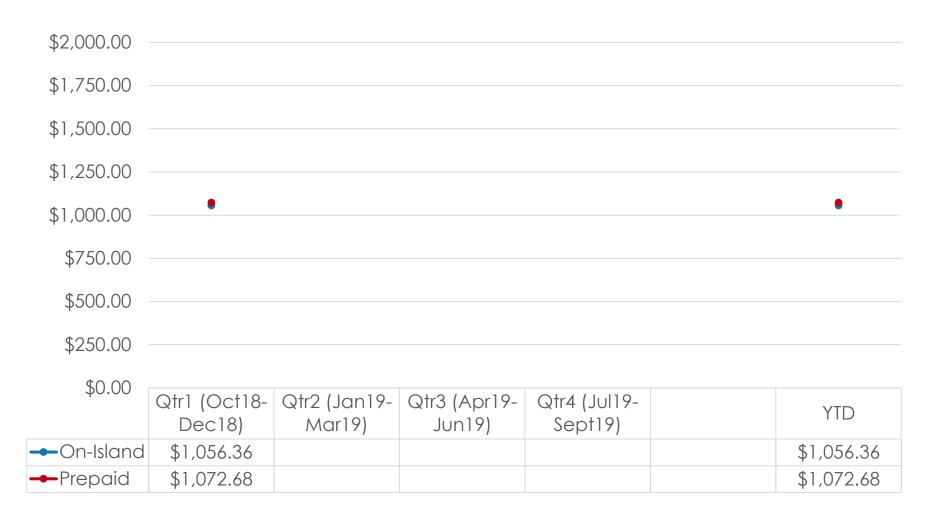
On-Island Per Person – Key Segments

GVB EXIT SURVEY
Q11A ONISLE EXPENDITURE- PER PERSO

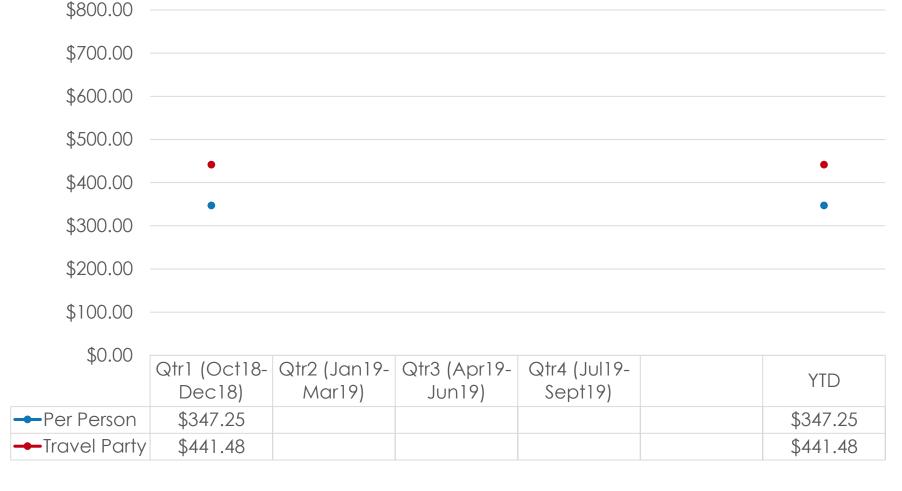
		TOTAL	FIT	FAMILY	HONEYMOO N
			. 85	3575	15
ONISLE PP	Mean	\$1,056.36	\$1,017.40	\$1,122.70	\$1,122.33
	Median	\$640	\$610	\$683	\$870

Prepared by Anthology Research

Per Person MEAN expenditures – FY2019 Tracking On-Island/ Prepaid



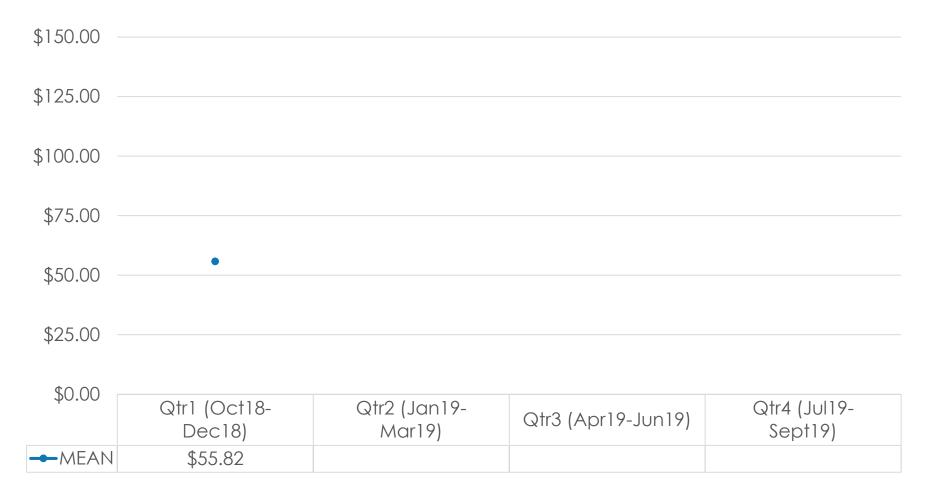
On-Island Per Day Spending – FY2019 Tracking MEAN



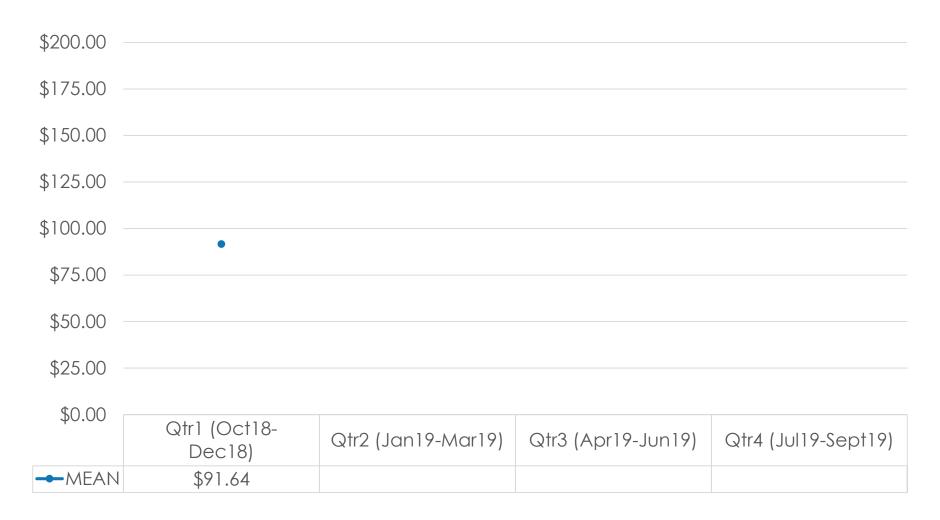
On-Island Expenses by Category – MEAN Entire Travel Party



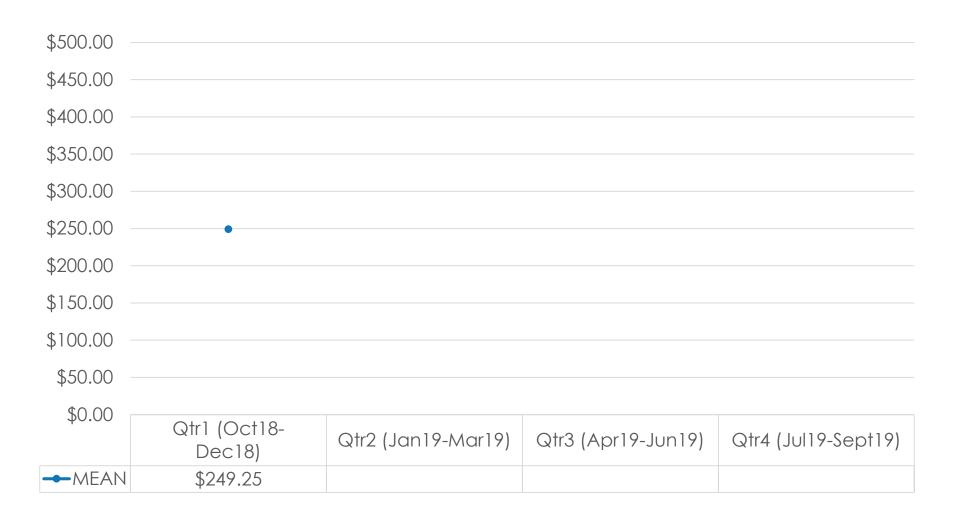
On-Island – FY2019 Tracking Food & Beverage - Hotel



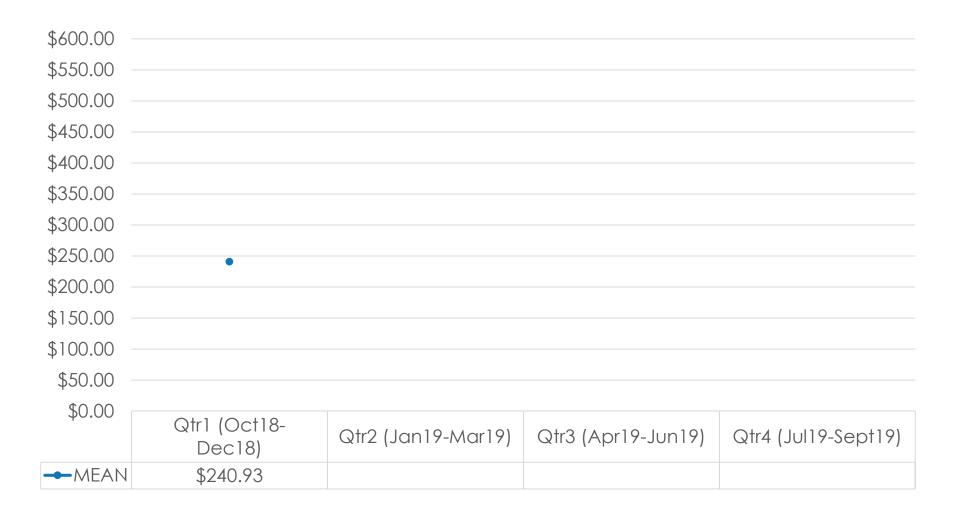
Food & Beverage – Fast Food/ Convenience Store



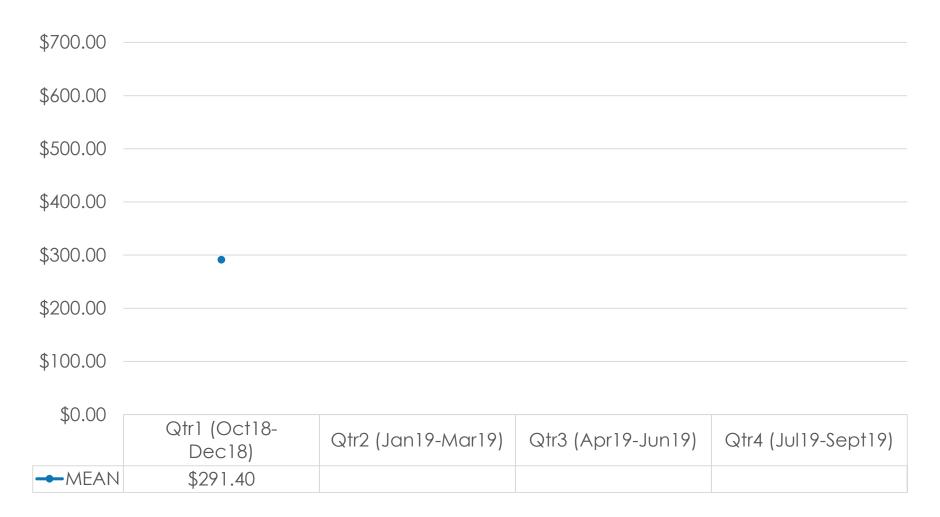
Food & Beverage – Restaurant/ Drinking Est Outside Hotel



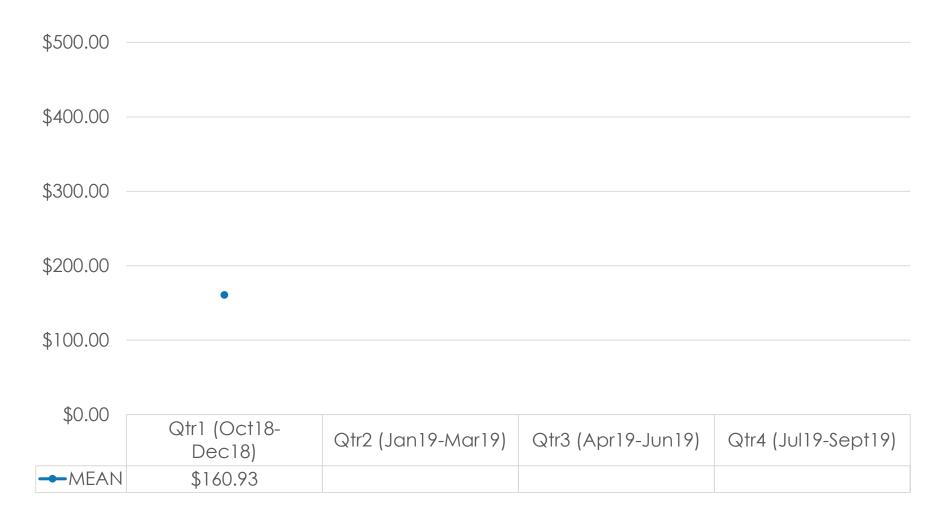
Optional tour/ Activities



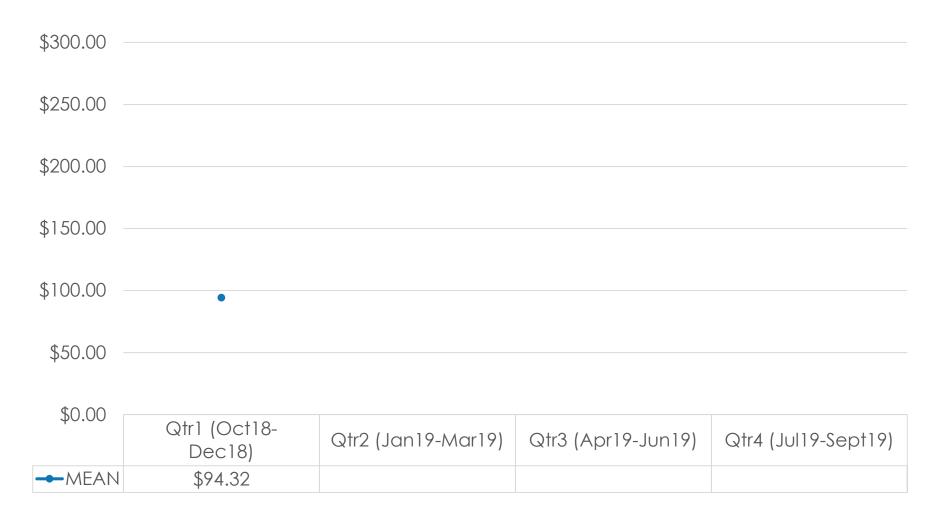
Gift/ Souvenir - Self/ Companion



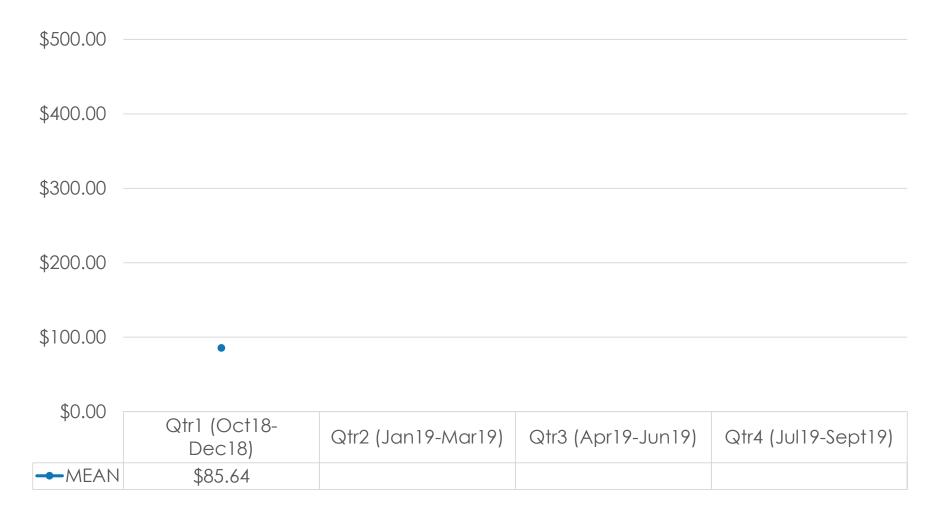
Gift/ Souvenir – Friends/ Family



Local Transportation



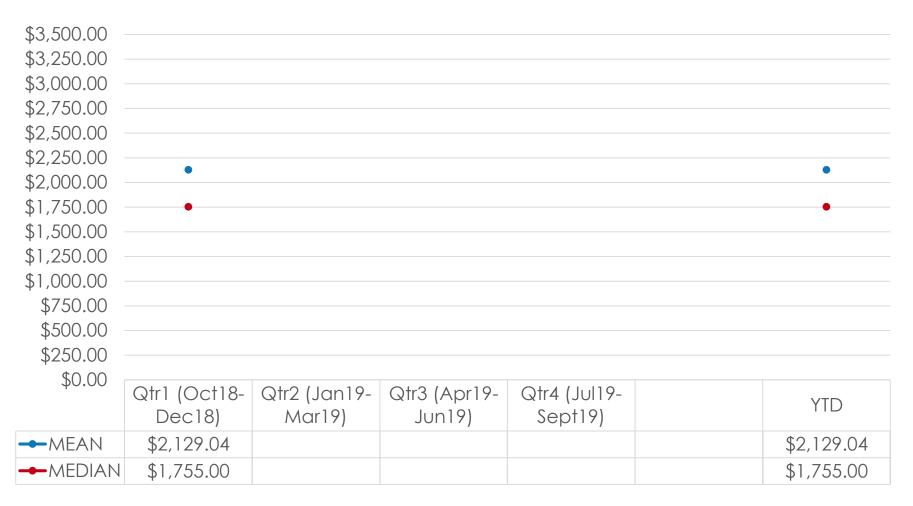
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

 \$2,129.04 = TOTAL per person overall mean average (prepaid & on-isle) expenditures

TOTAL Per Person Expenditures – FY2019 Tracking



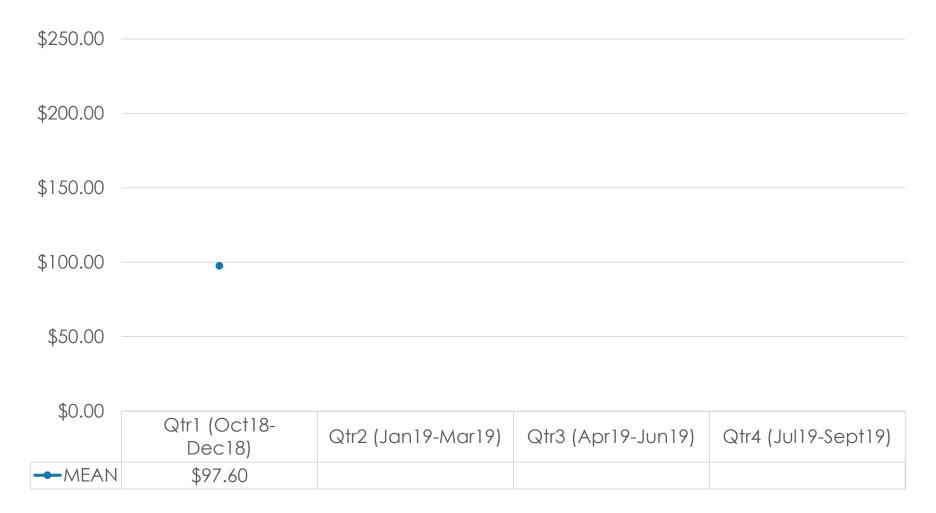
TOTAL Per Person Expenditures – Key Segments

GVB EXIT SURVEY TOTAL PER PERSON SPENDIN

		TOTAL	FIT	FAMILY	HONEYMOO N
		15	373	₹8	<u> </u>
TOTAL PP	Mean	\$2,129.04	\$2,099.38	\$2,231.22	\$2,310.54
	Median	\$1,755	\$1,694	\$1,778	\$2,034

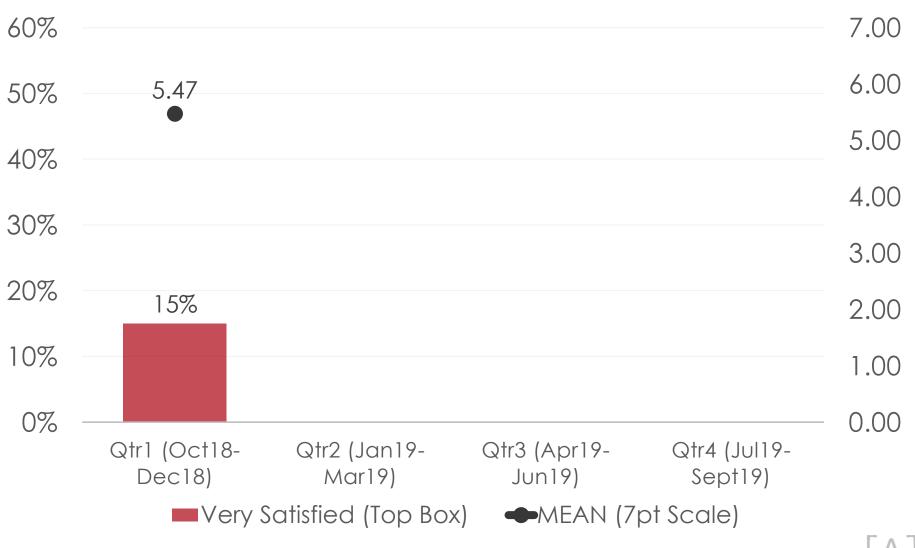
Prepared by Anthology Research

GUAM AIRPORT EXPENDITURE – FY2019 Tracking

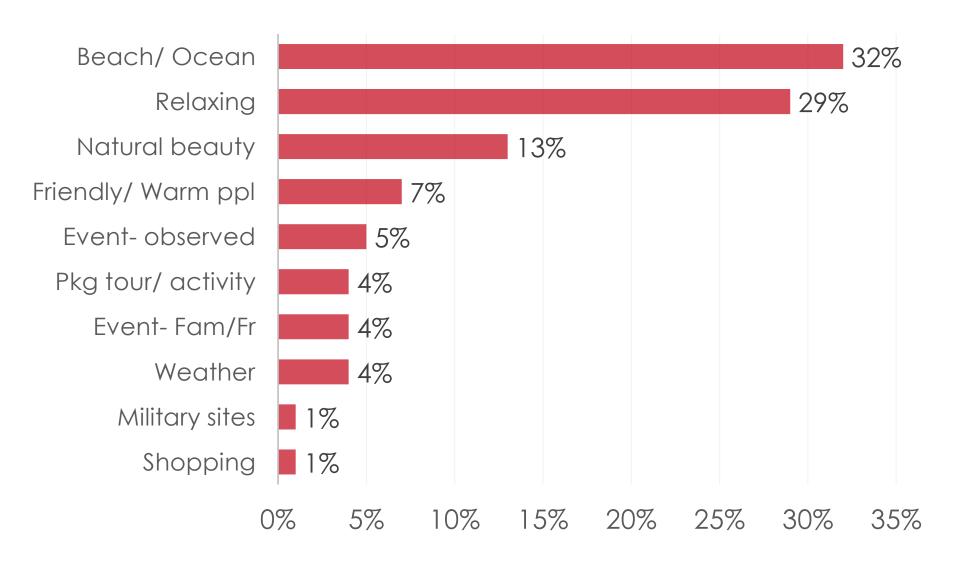


SECTION 4 VISITOR SATISFACTION BEHAVIOR

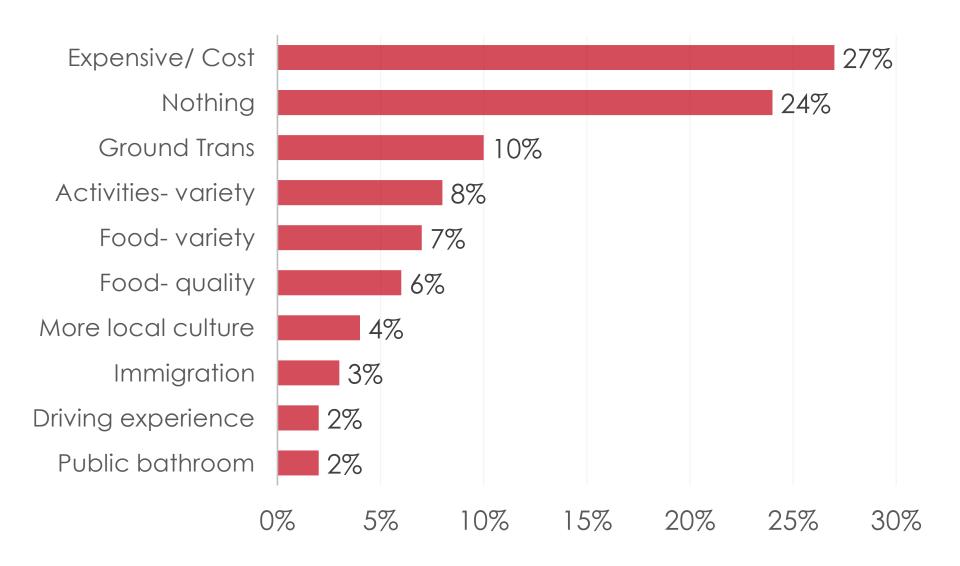
OVERALL SATISFACTION



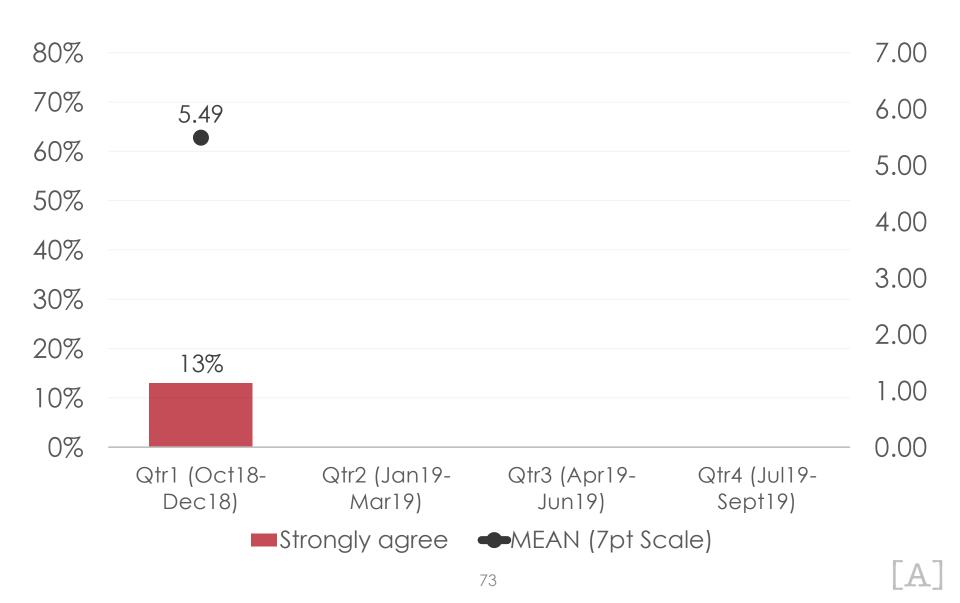
Positive Aspect of Trip



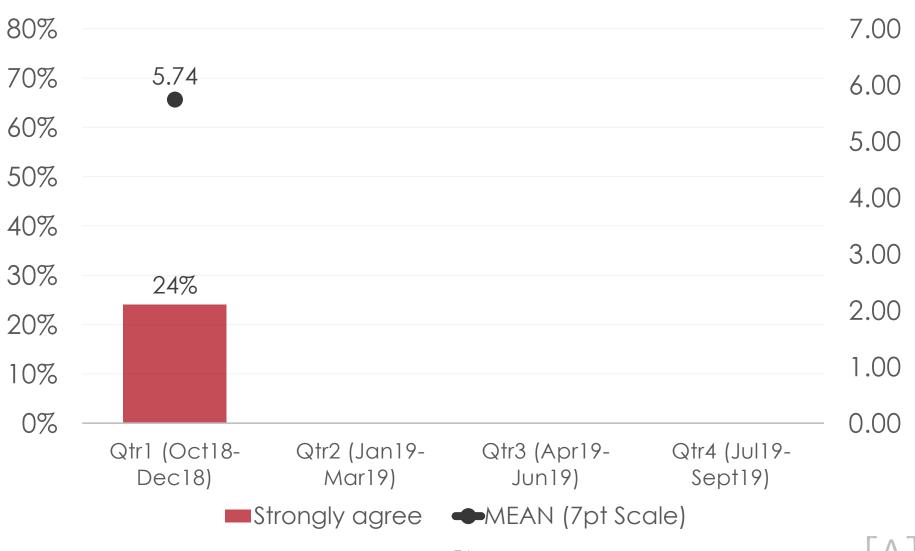
Negative Aspect of Trip



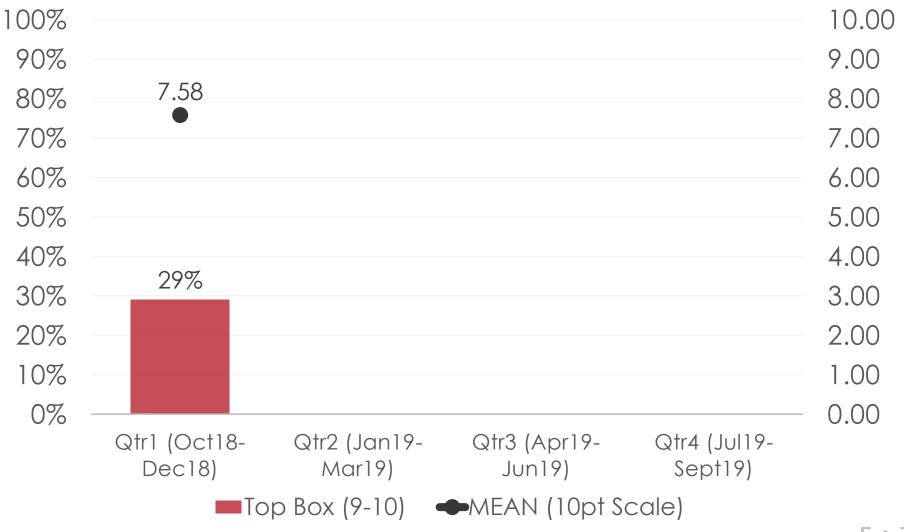
Guam was better than expected



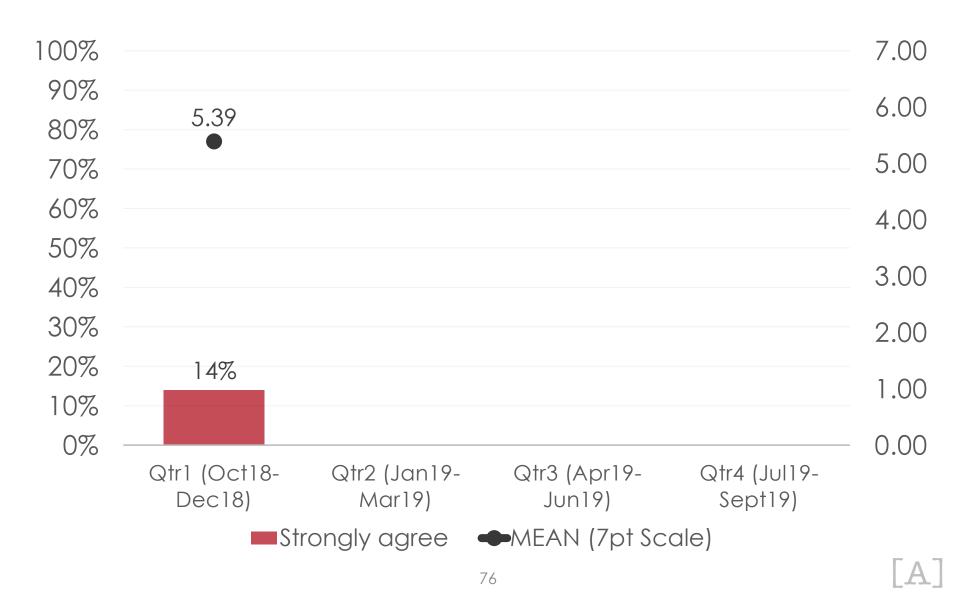
I had no communication problems



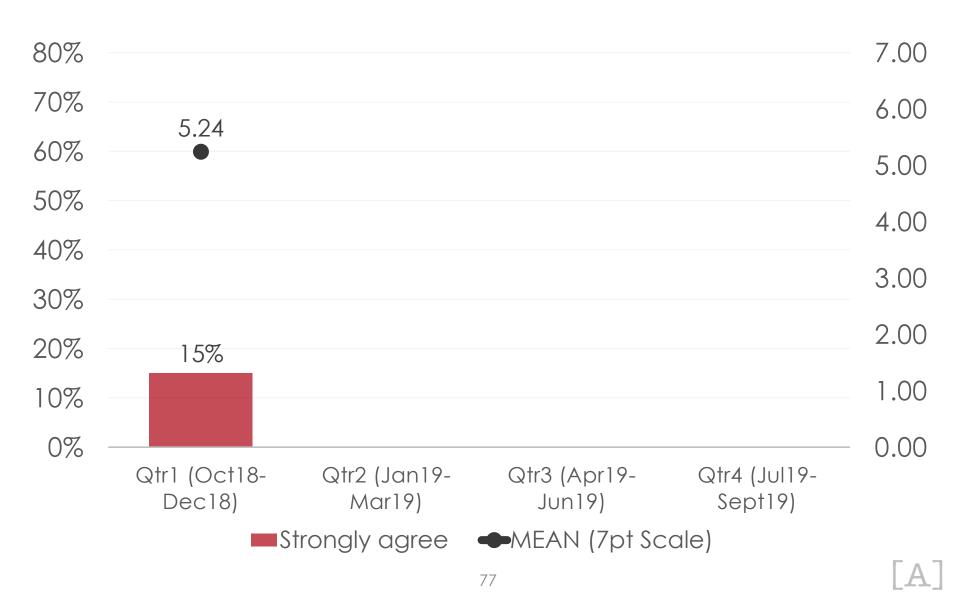
Recommend Guam- family & friends



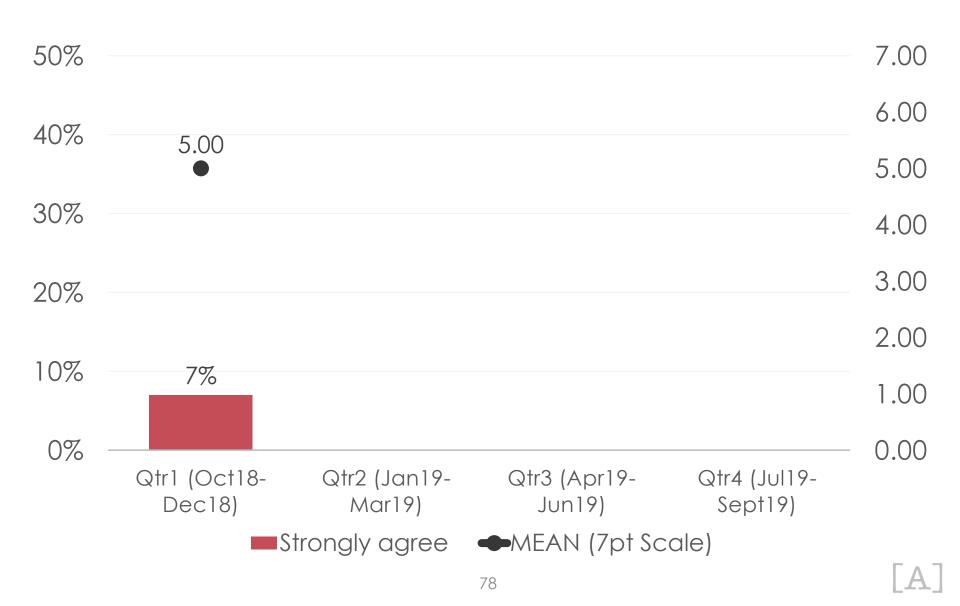
Sites on Guam were attractive



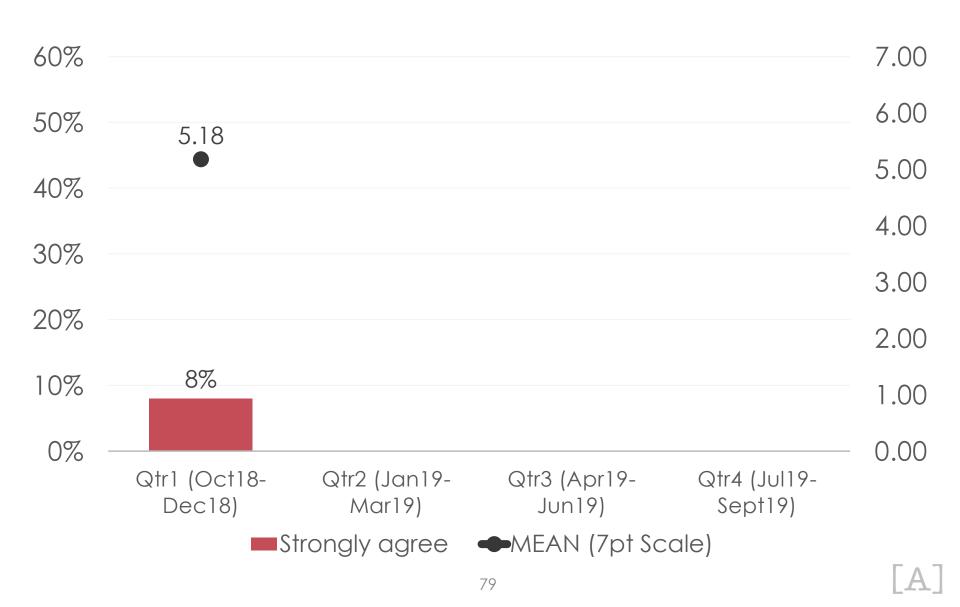
I plan to visit Guam again



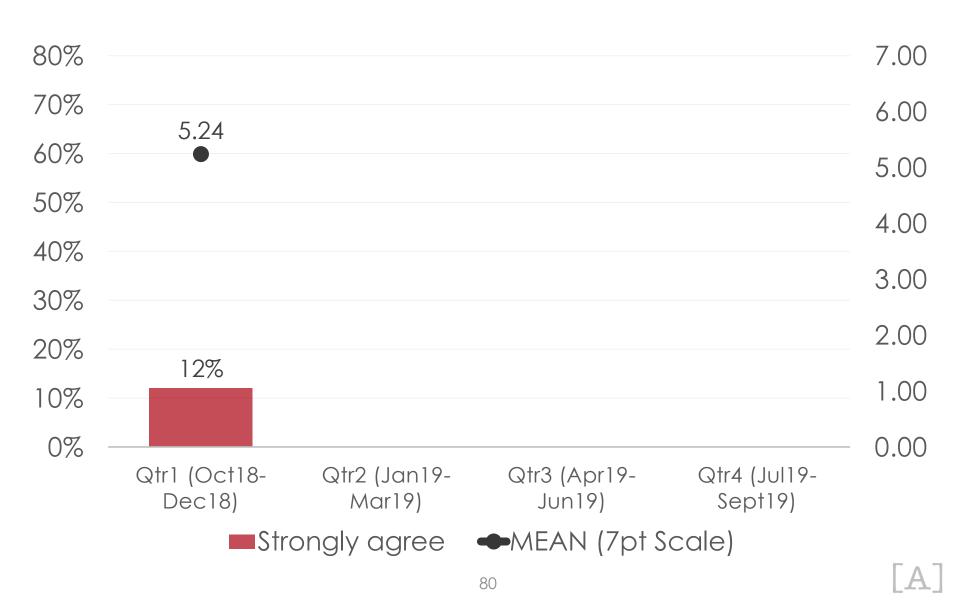
Not enough night time activities



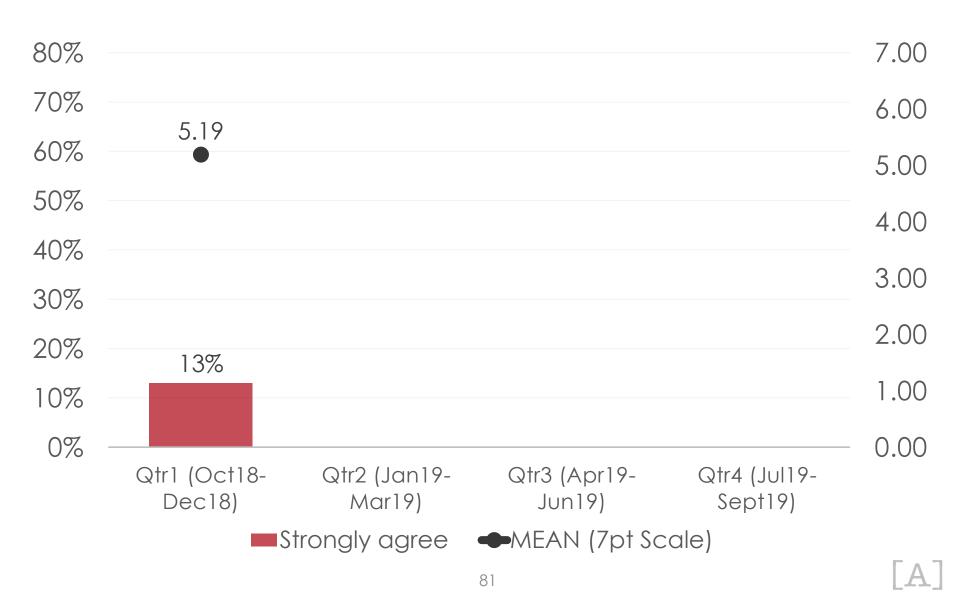
Tour guides were professional



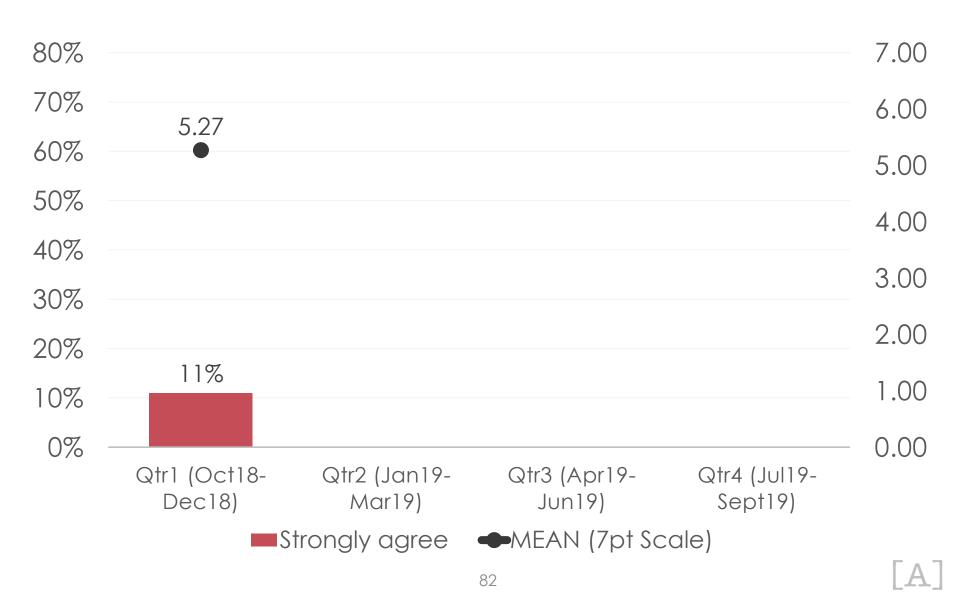
Tour drivers were professional



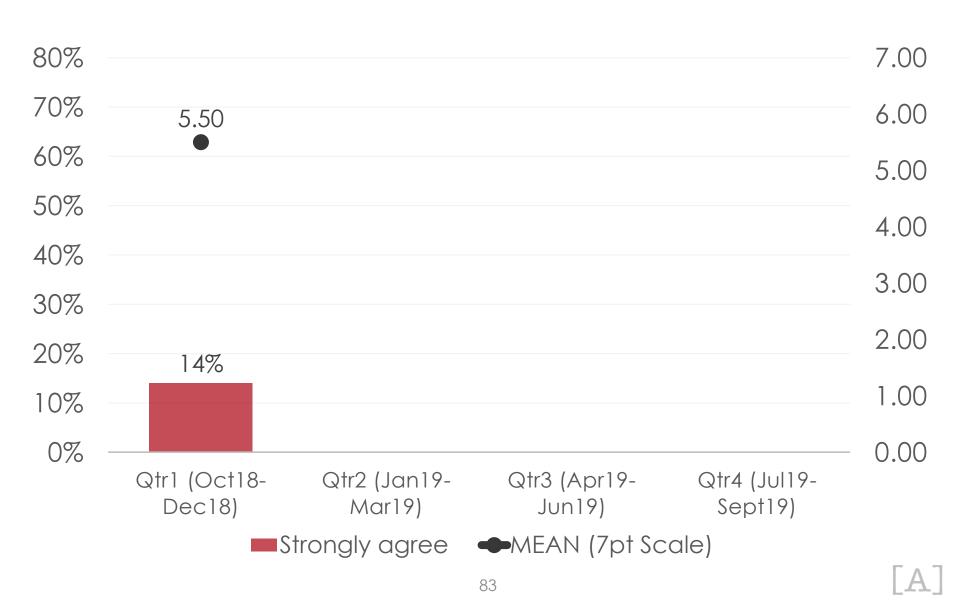
Taxi drivers were professional



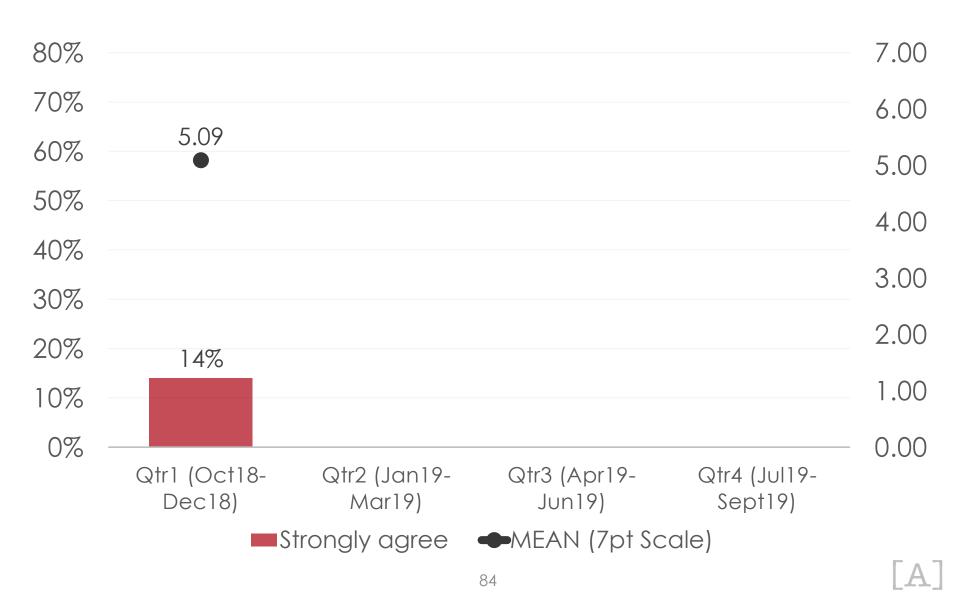
Taxis were clean



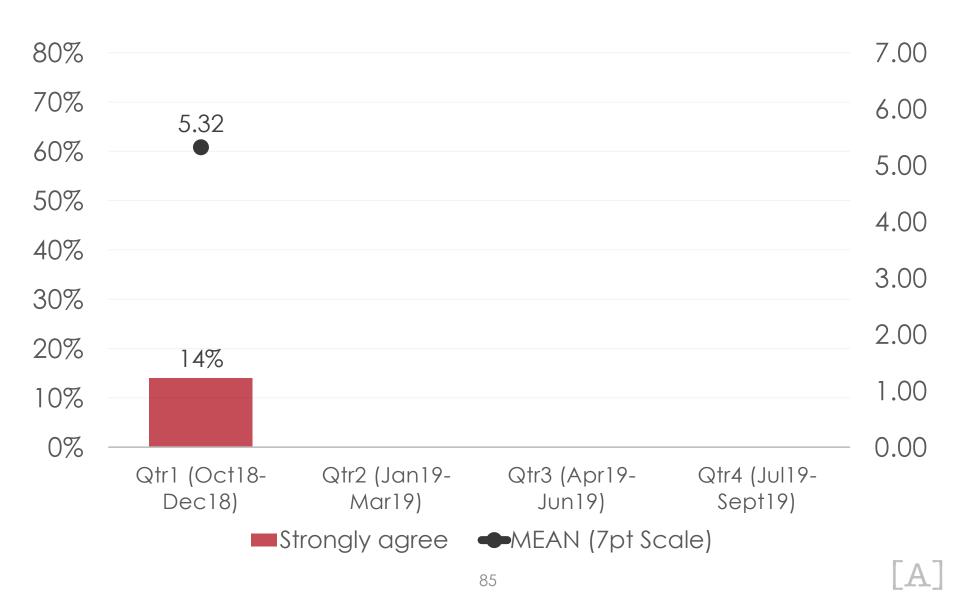
Guam airport was clean



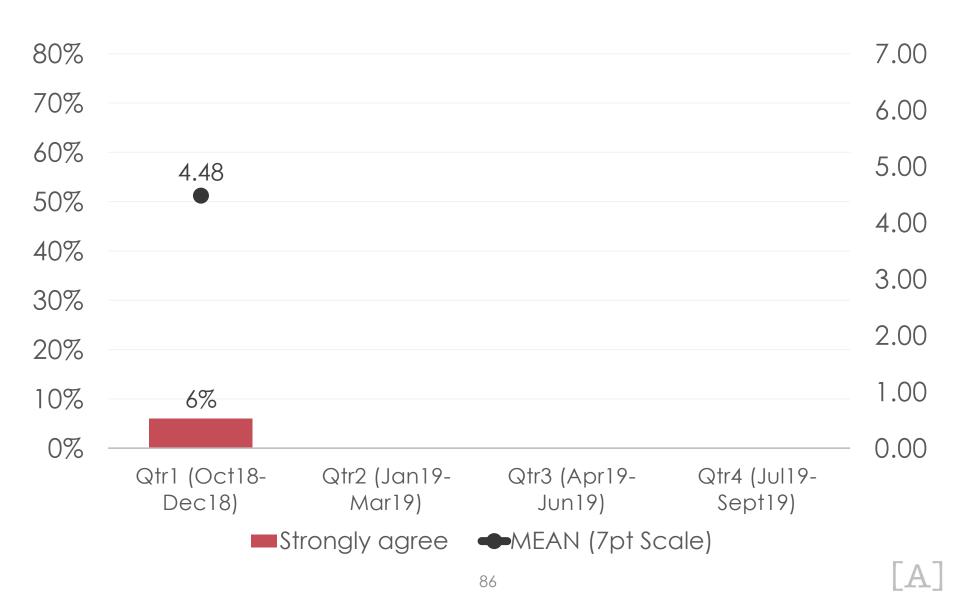
Ease of getting around



Safety walking around at night

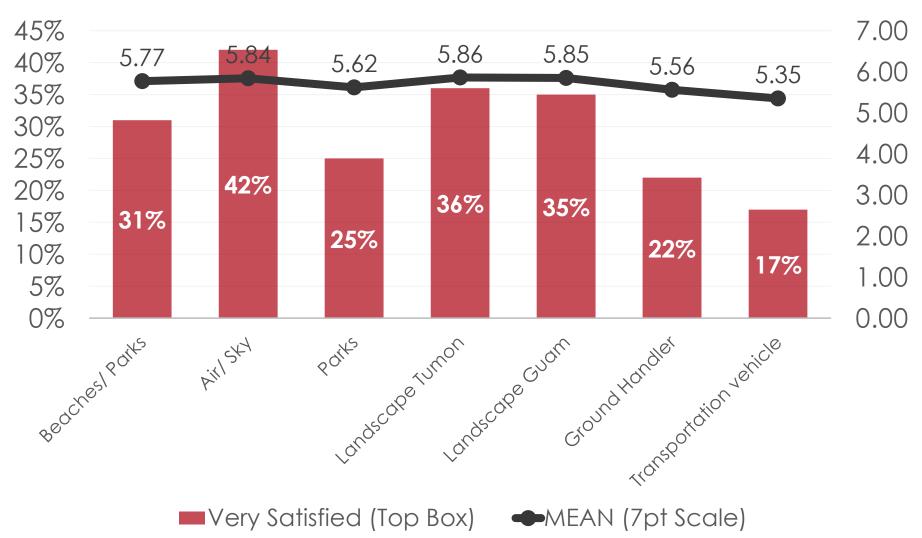


Price of things on Guam

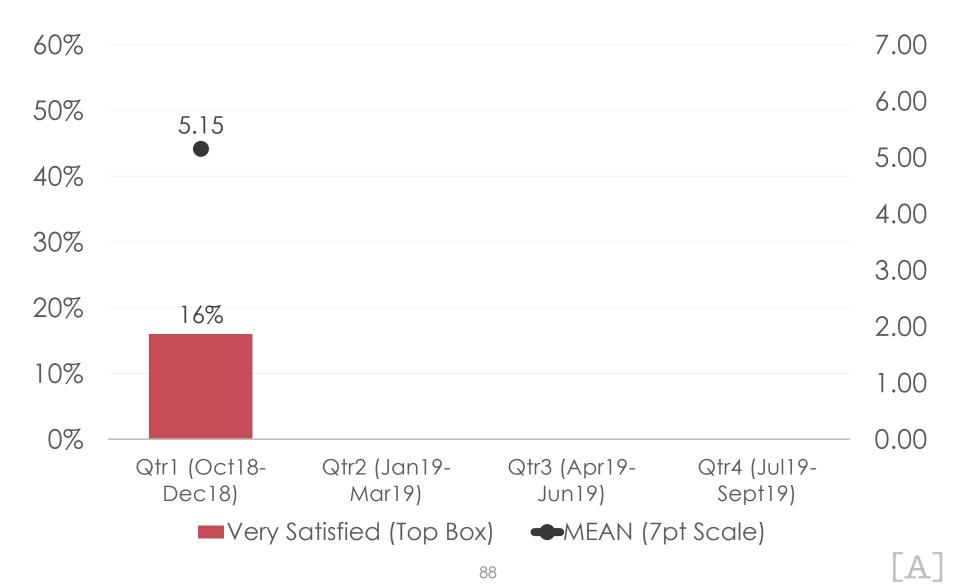


GENERAL SATISFACTION –

Quality/ Cleanliness

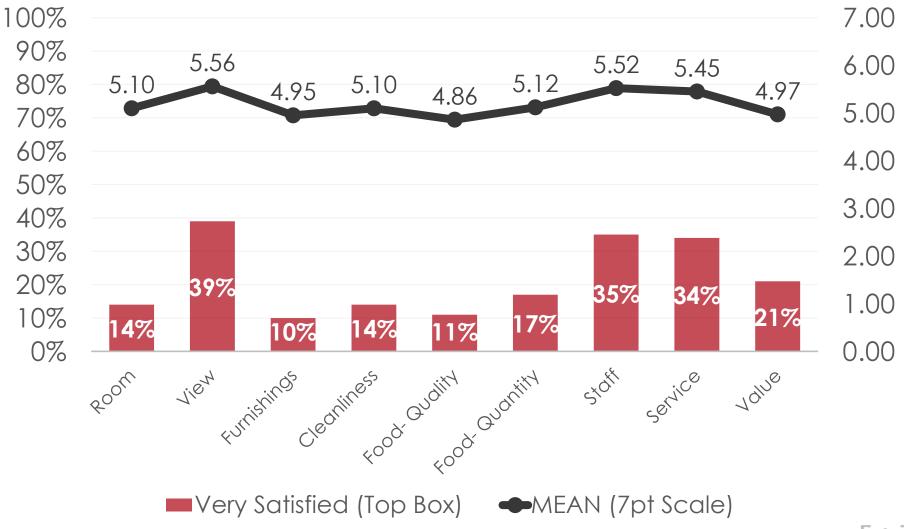


ACCOMMODATIONS – OVERALL SATISFACTION



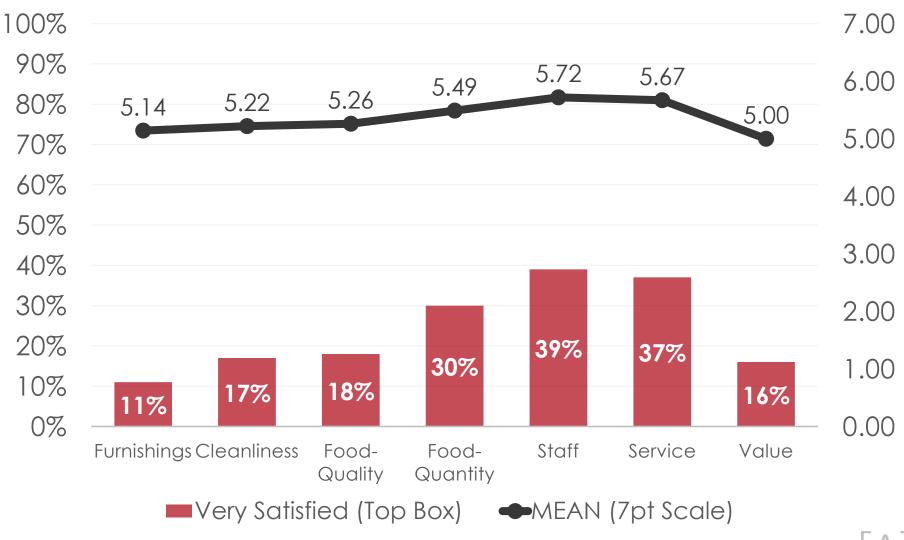
ACCOMMODATIONS –

Satisfaction by Category

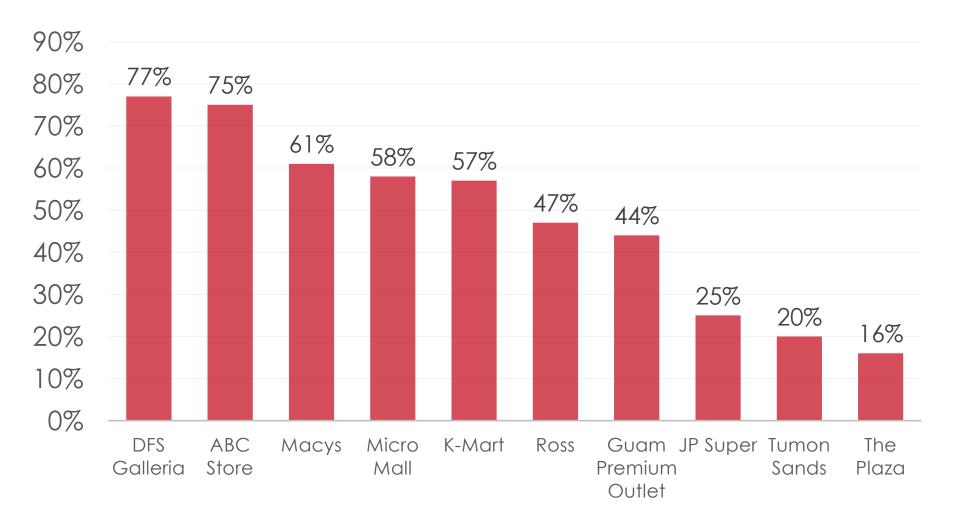


DINING EXPERIENCE (Outside Hotel) –

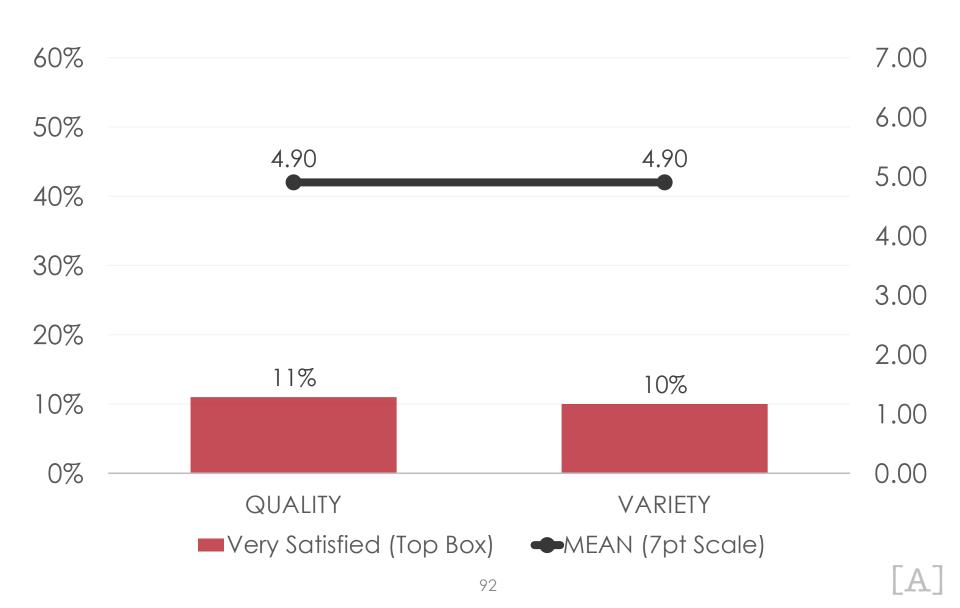
Satisfaction by Category



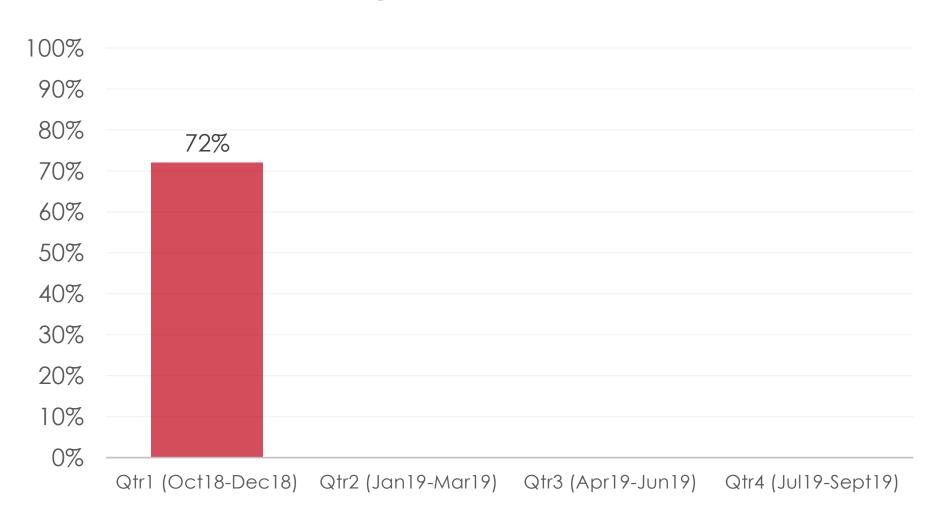
Shopping Malls/ Stores (Top Responses)



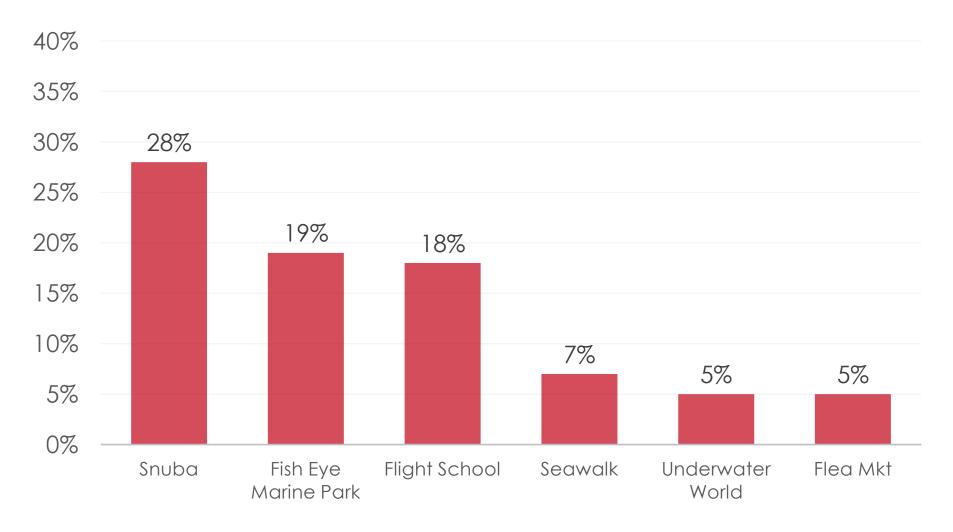
SHOPPING - SATISFACTION



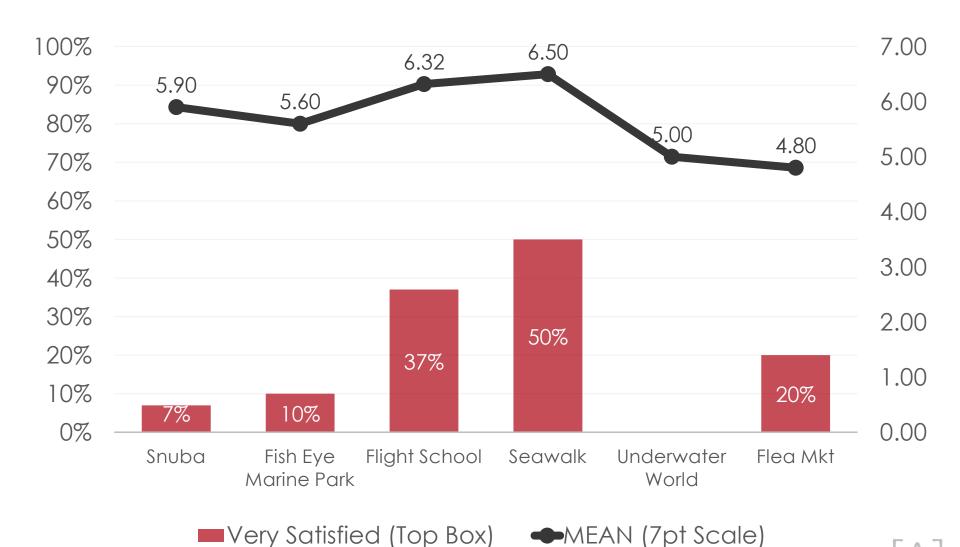
OPTIONAL TOUR PARTICIPATION – FY2019 Tracking



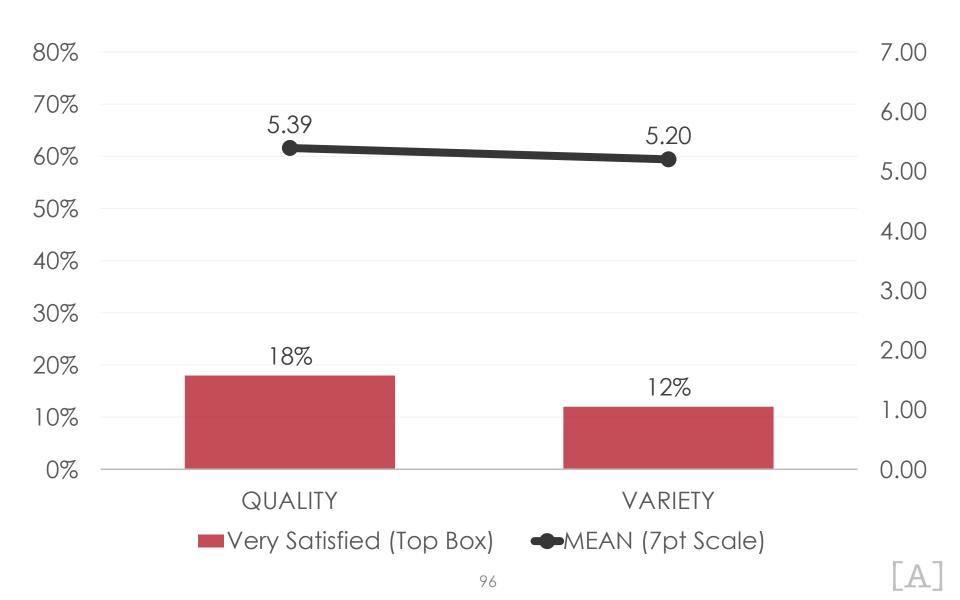
Optional Tour Participation (Top Responses/ 5%+)



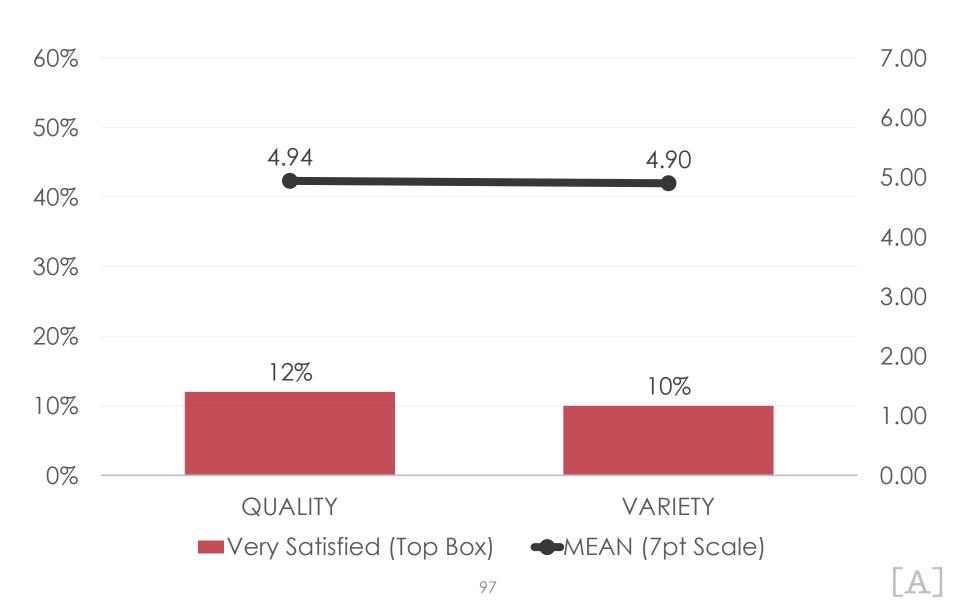
Optional Tour Satisfaction Top Responses only - Participation (5%+)



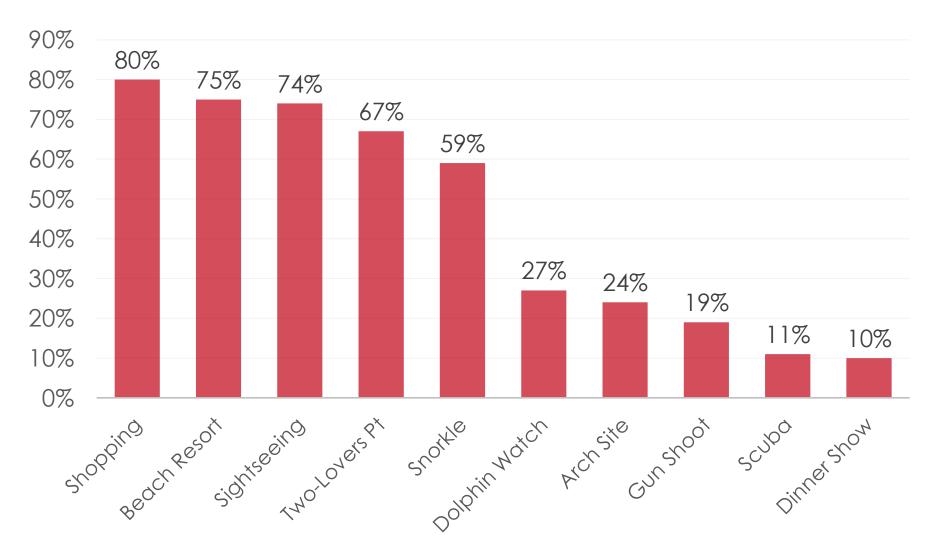
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

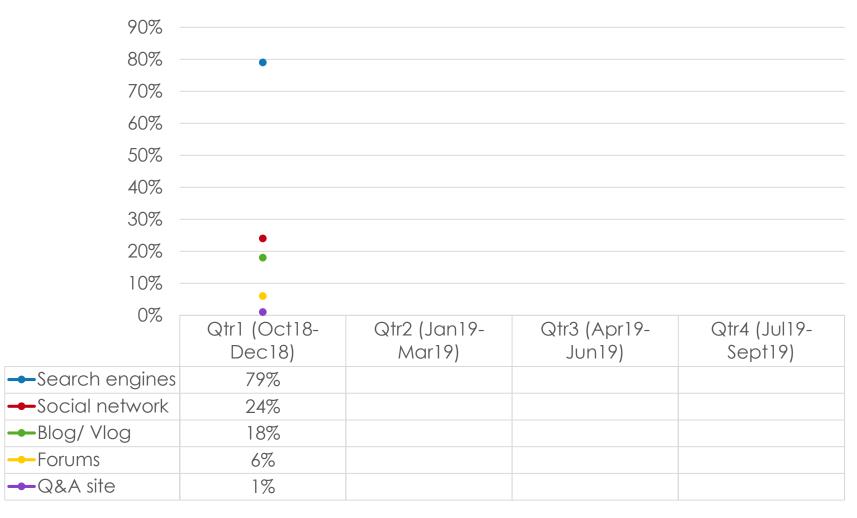


Activities Participation (Top Responses)

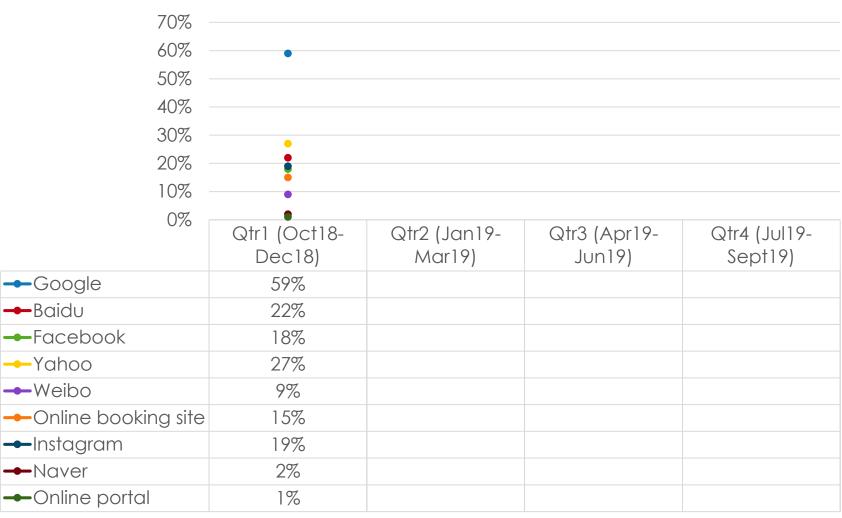


SECTION 5 PROMOTIONS

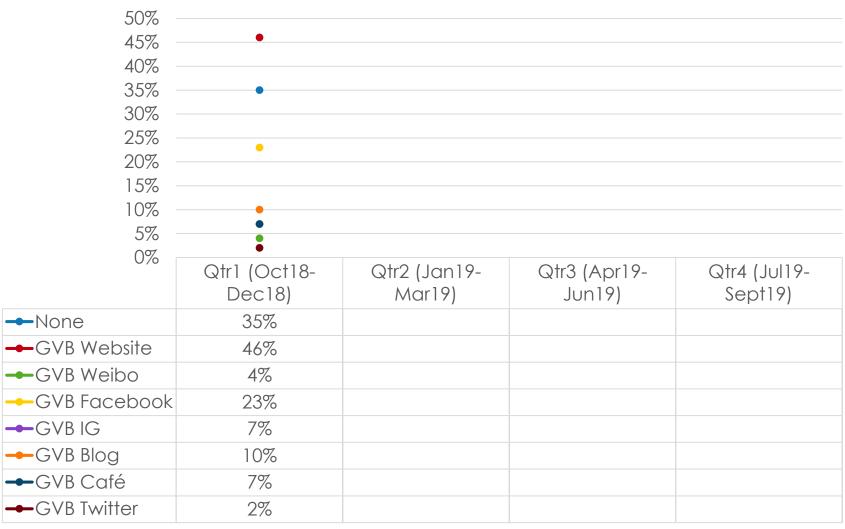
INTERNET- GUAM SOURCES OF INFORMATION



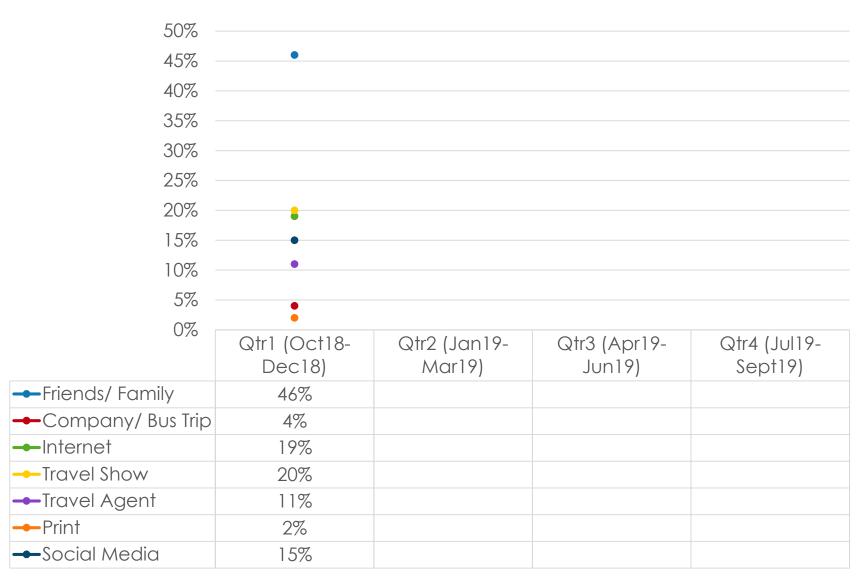
INTERNET- SOURCES OF INFORMATION Things to do on Guam



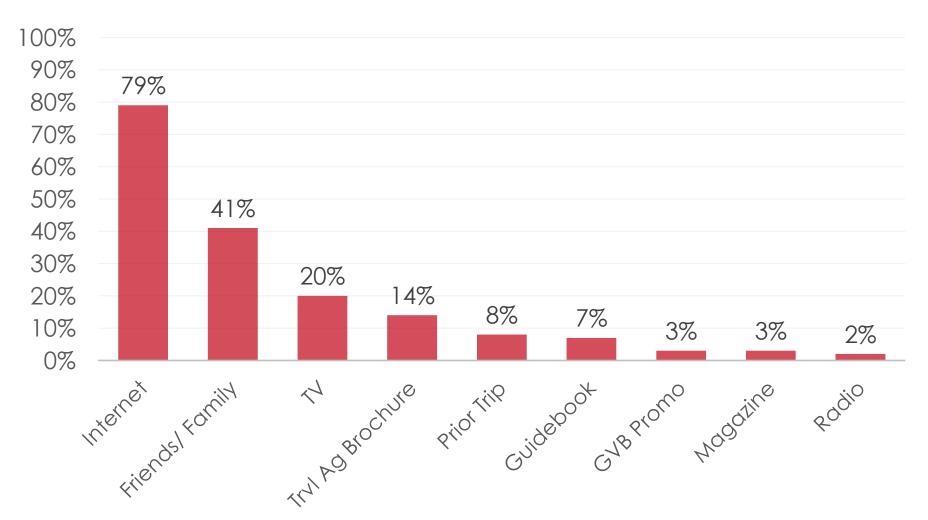
INTERNET- SOURCES OF INFORMATION GVB



TRAVEL MOTIVATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

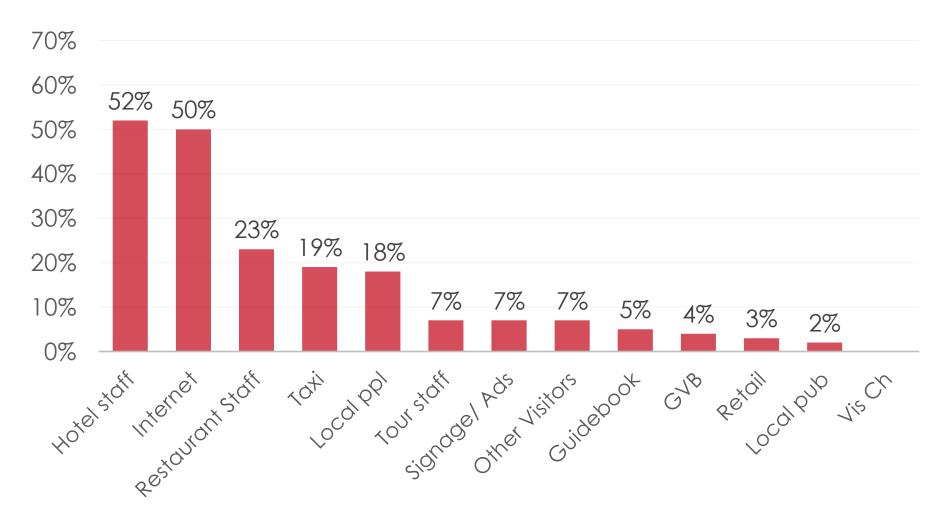
GVB EXIT SURVEY

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

		TOTAL	FIT	FAMILY	HONEYMOO N
Q1	Internet/Mobile App	79%	81%	77%	93%
	Friend or relative	41%	42%	38%	53%
	TV	20%	19%	27%	20%
	Travel agent brochure	14%	11%	15%	
	I have been to Guam before	8%	9%	12%	13%
	Travel guide book at bookstores	7%	6%	7%	13%
	Magazine (consumer)	3%	2%	3%	7%
	Guam Visitors Bureau promotional activities	3%	3%	2%	
	Radio	2%	2%		
	Travel trade shows	2%	2%	3%	7%
	Consumer travel shows	2%		3%	
	Guam Visitors Bureau office	1%		2%	
	Total	107	89	60	15

Prepared by Anthology Research

ONISLE SOURCES OF INFORMATION



ON-ISLE SOURCES OF INFORMATION – Key Segments

GVB EXIT SURVEY

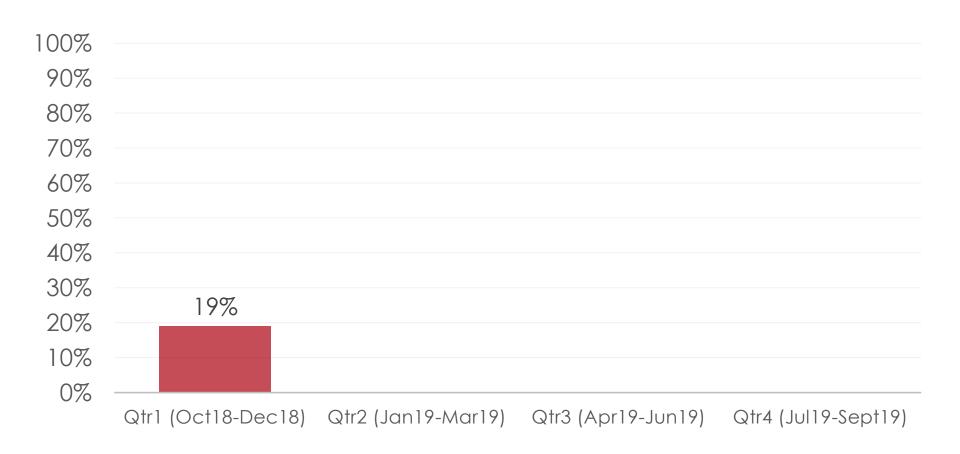
Q2 Please select the top three sources of information you used to find out about Guam while you were here:

		TOTAL	FIT	FAMILY -	HONEYMOO N
Q2	Hotel staff	52%	53%	58%	53%
	Internet/Mobile App	50%	51%	50%	80%
	Restaurant staff (outside hotel)	23%	26%	30%	20%
	Taxi drivers	19%	19%	13%	7%
	Local people	18%	18%	15%	13%
	Signs/ advertisement	7%	7%	8%	20%
	Tour staff	7%	2%	8%	7%
	Othervisitors	7%	7%	7%	7%
	Guide books I brought with me	5%	4%	3%	7%
	Guam Visitors Bureau	4%	3%	2%	
	Retail staff	3%	2%	3%	
	Local publication	2%	2%	2%	
	Total	107	89	60	15

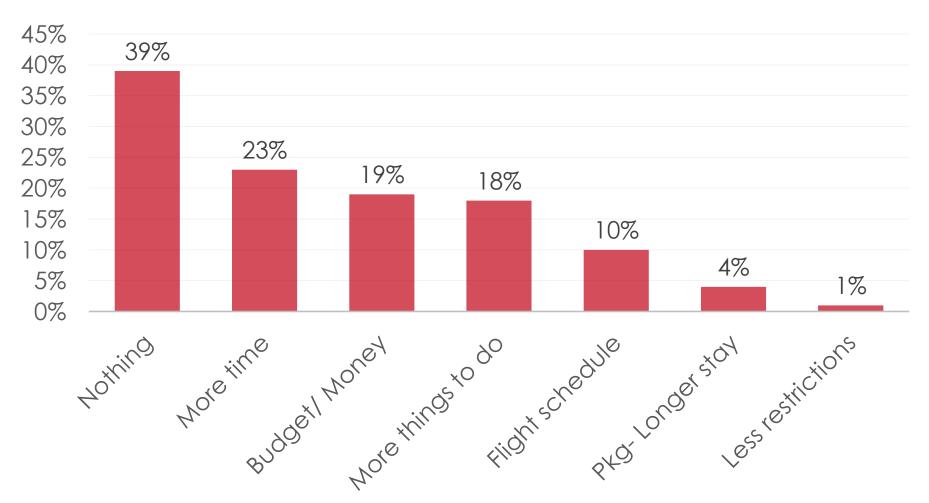
Prepared by Anthology Research

SECTION 6 FUTURE TRAVEL TO GUAM

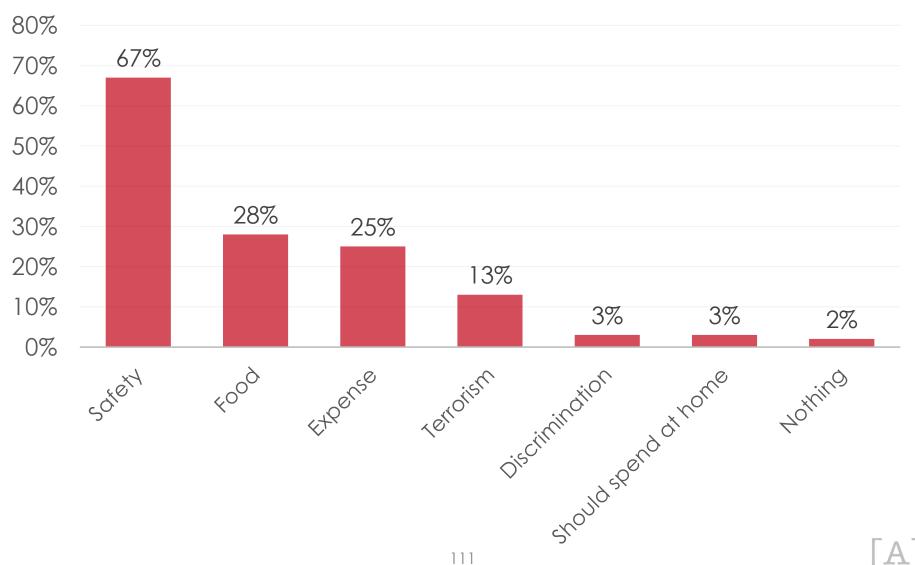
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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

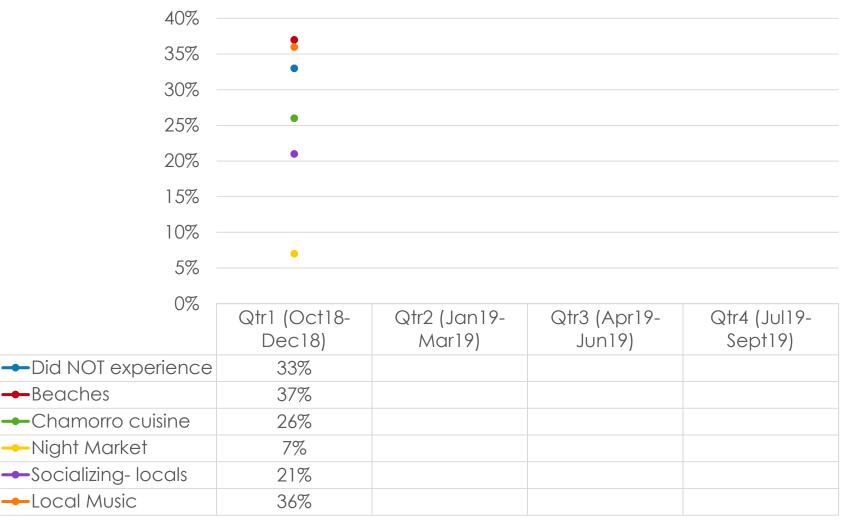


FUTURE TRAVEL CONCERNS

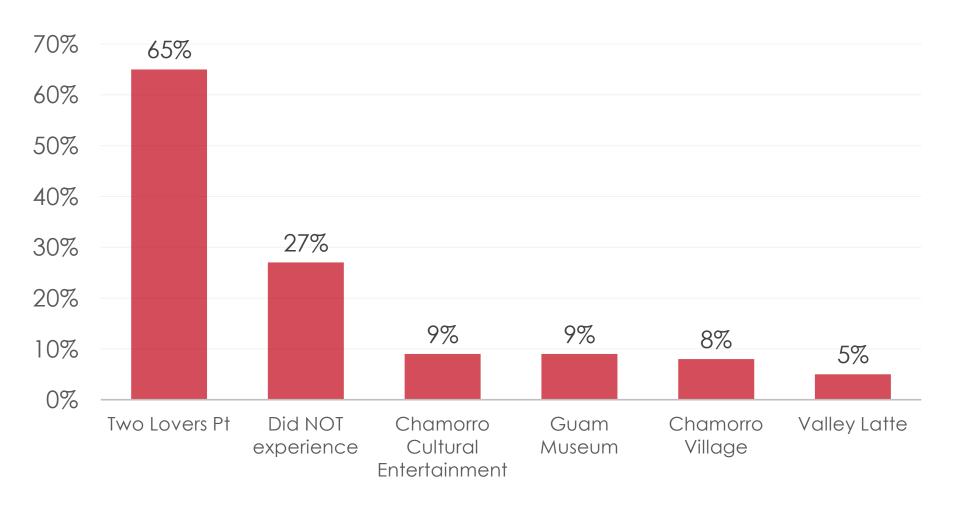


SECTION 7 GUAM CULTURE

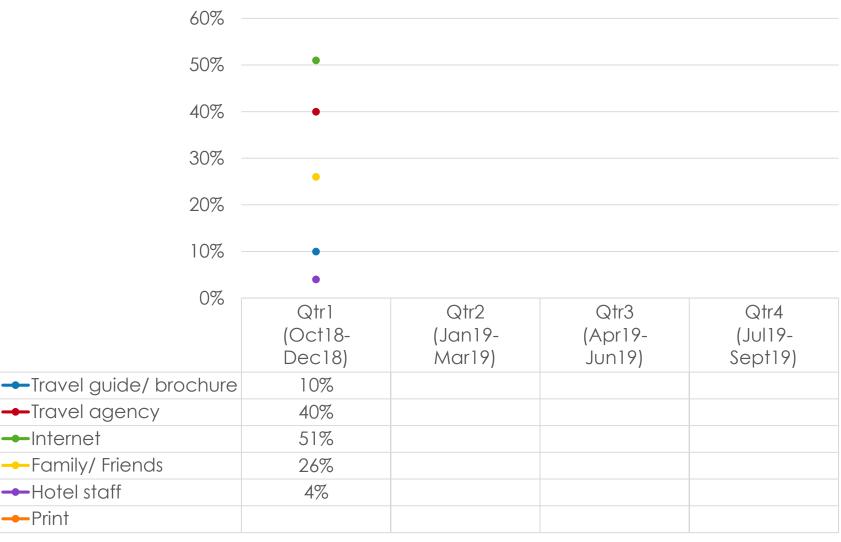
EXPERIENCED-CHAMORRO/ HAFA ADAI SPIRIT



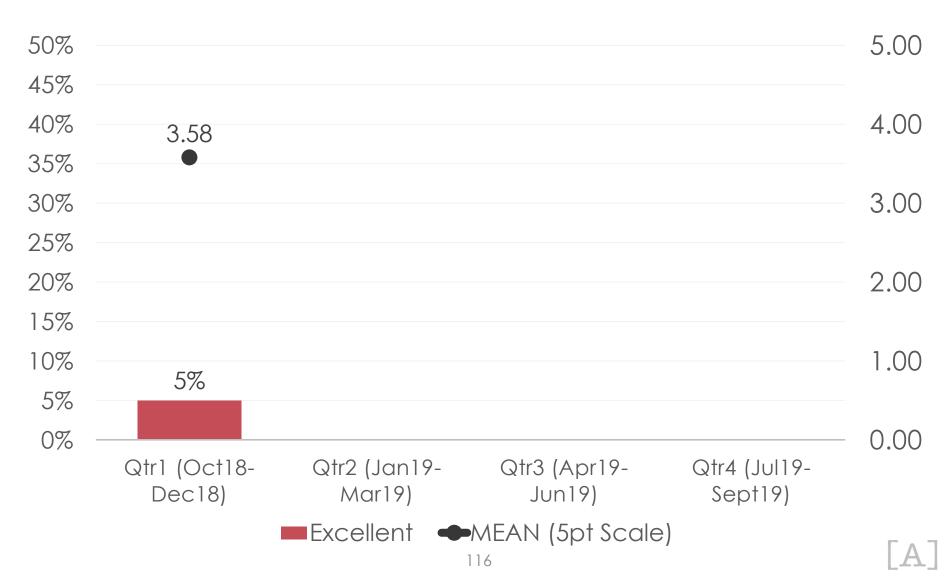
EXPERIENCEDOTHER CULTURAL ACTIVITY/EVENTS



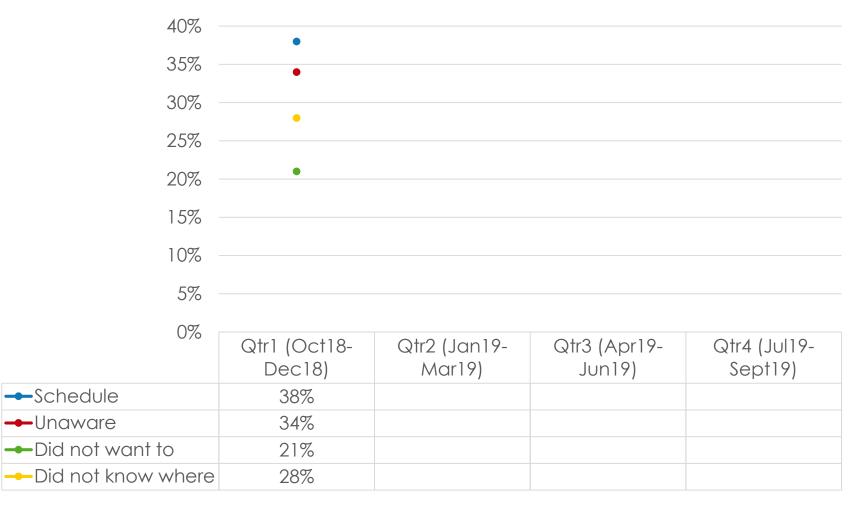
SOURCES OF INFORMATION-CULTURAL ACTIVITY/EVENTS



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=<.05) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Drivers- Overall Satisfaction

Drivers of Overall Satisfaction, 1st Qtr. 2019		
Drivers:	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	2	
Quality of hotel accommodations		
Quality/cleanliness of air, sky	1	
Quality/cleanliness of parks		
Quality of landscape in Tumon	3	
Quality of landscape in Guam		
Quality of ground handler		
Quality/cleanliness of transportation		
vehicles		
% of Overall Satisfaction Accounted		
For	67.1%	
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 1st Quarter 2019 Period. By rank order they are:
 - Quality/cleanliness of air/sky,
 - Price of things on Guam, and
 - Quality of landscape in Tumon.
- With these factors, the overall r² is .671 meaning that 67.1% of overall satisfaction is accounted for by these factors.

Drivers – On-Isle Expenditures

Drivers of Per Person On Island Expenditures, 1st Qtr. 2019	
Drivers:	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	d.

Drivers of On-Isle Expenditures

• Per Person On Island Expenditure of Hong Kong visitors on Guam is driven by no significant factors in the 1st Quarter 2019 period.