



Guam Visitors Bureau

Hong Kong Visitor Tracker Exit Profile & Market Segmentation Report

FY2019 - QTR.4 (JUL-SEPT 2019)

[ANTHOLOGY®]
RESEARCH



Background and Methodology

- All surveys were partially interviewer administered. Upon completion of the surveys, Anthology's professional Hong Kong speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent was present.
- A total of 100 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 100 is +/- 9.80 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 +/- 9.80 percentage points.

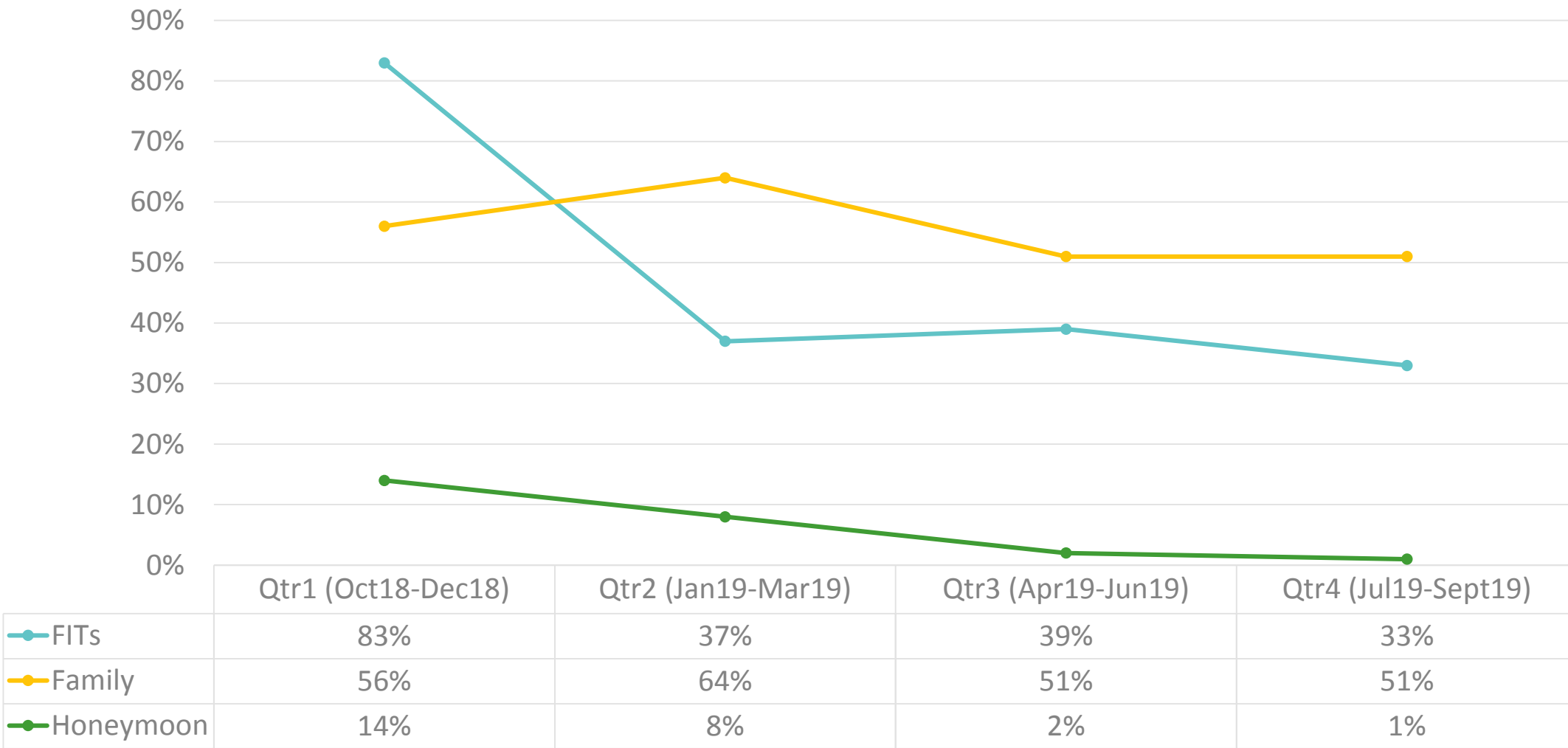
Objectives

- 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 (Q12 Not on Organized Group Tour & Q14 Direct booking w/ airline, hotel)
 - Honeymoon (Q8)
 - Family (Q11)
 - To identify the most significant factors affecting overall visitor satisfaction.
 - To identify (for all visitors from Hong Kong) the most important determinants of on-island spending.

Key Highlighted Segments



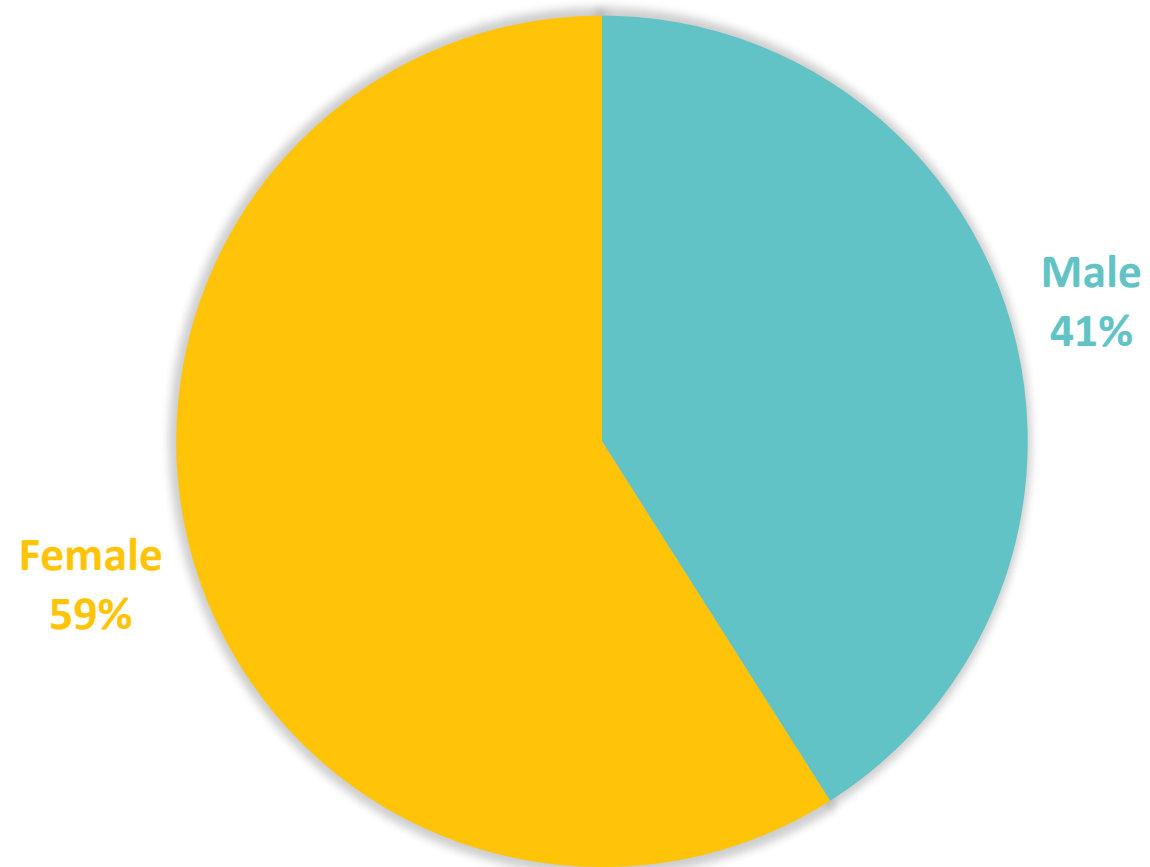


SECTION 1

PROFILE OF RESPONDENTS



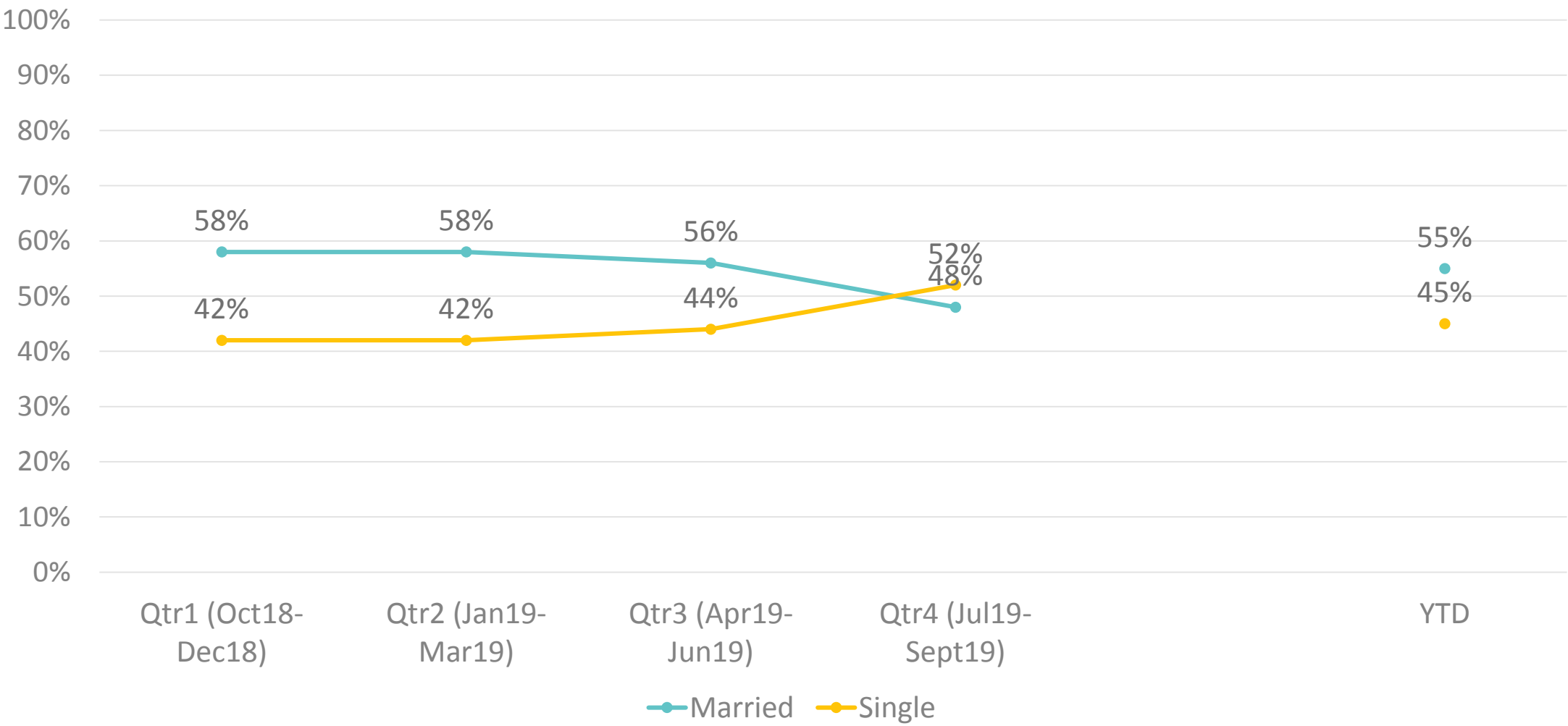
GENDER



MARITAL STATUS



MARITAL STATUS – TRACKING



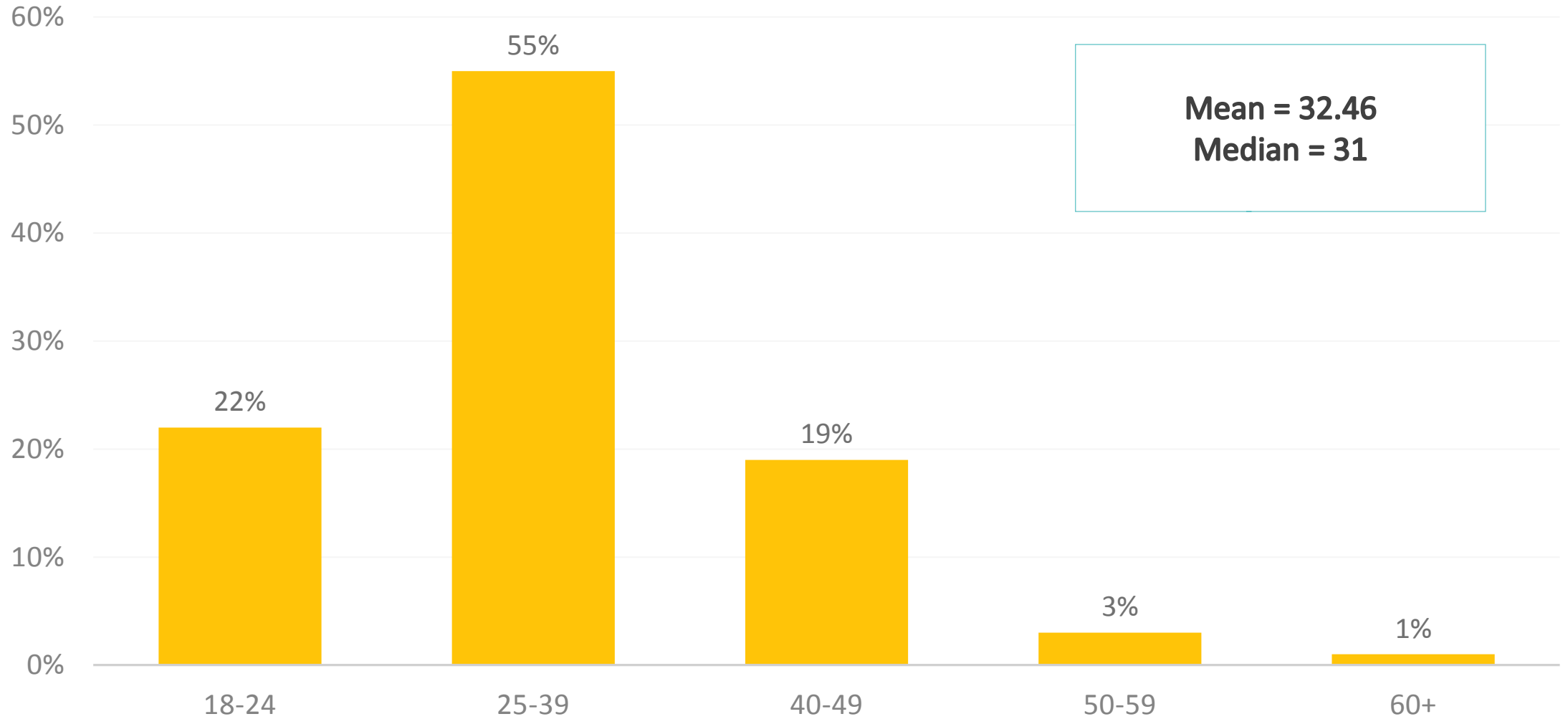
MARITAL STATUS – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
QE Are you married or single?

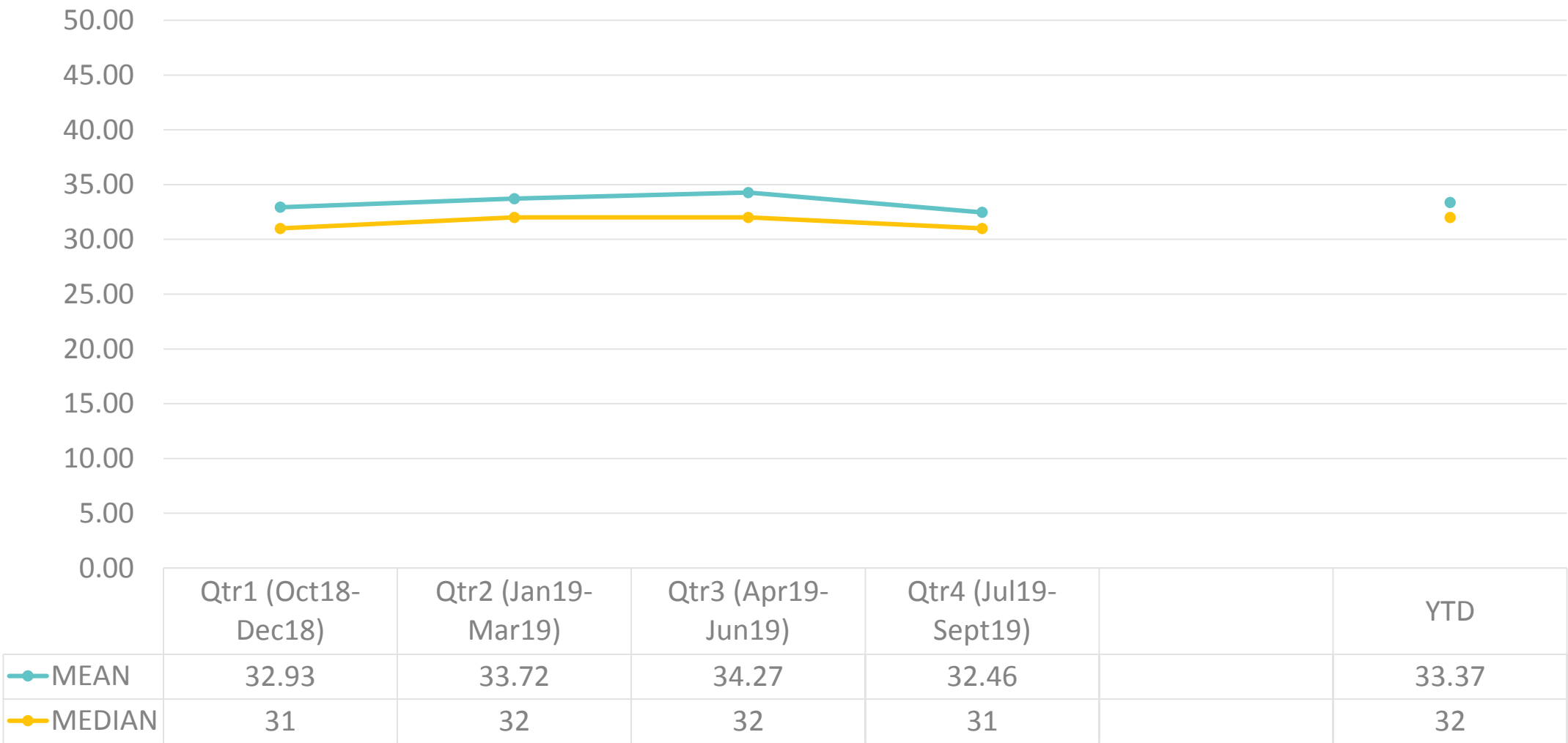
		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
QE	Married	48%	45%	73%	100%
	Single	52%	55%	27%	
	Total	100	33	51	1

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AGE



AGE – TRACKING



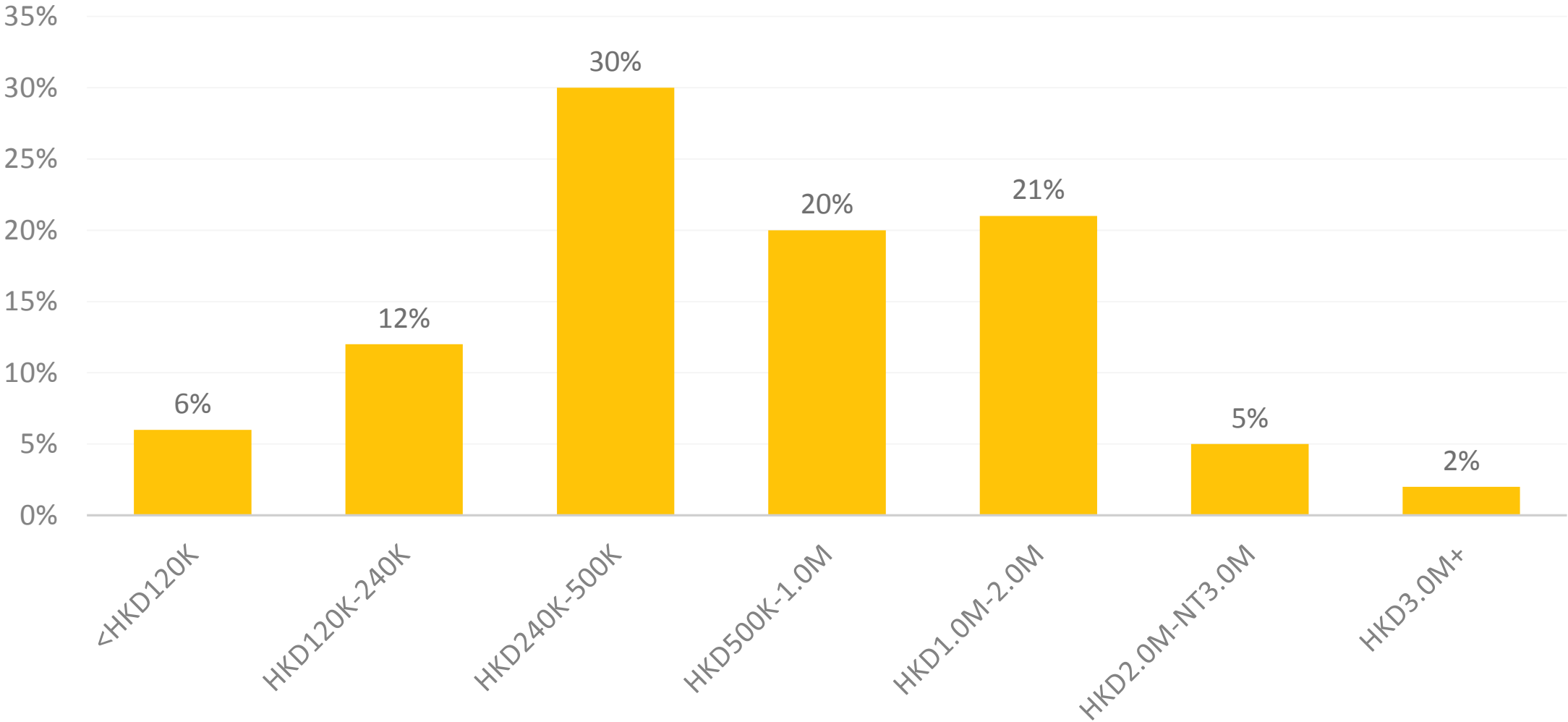
AGE – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
QF What was your age on your last birthday?

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
QF	18-24	22%	12%	22%	100%
	25-39	55%	70%	49%	
	40-49	19%	12%	27%	
	50-59	3%	6%		
	60+	1%		2%	
	Total	100	33	51	1
QF	Mean	32.46	32.52	33.53	33.00
	Median	31	31	33	33

Prepared by Anthology Research

HOUSEHOLD INCOME



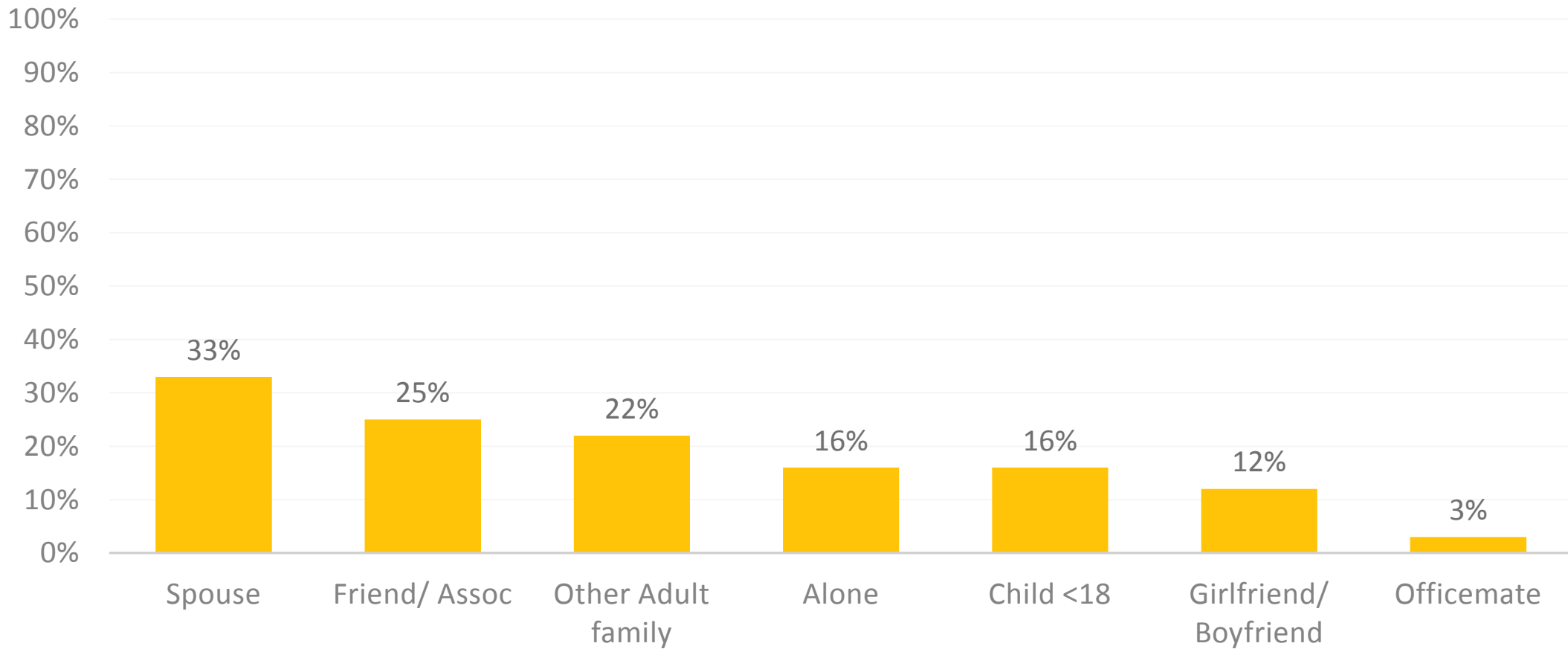
HOUSEHOLD INCOME – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
D2 What is your approximate annual household income, before taxes?

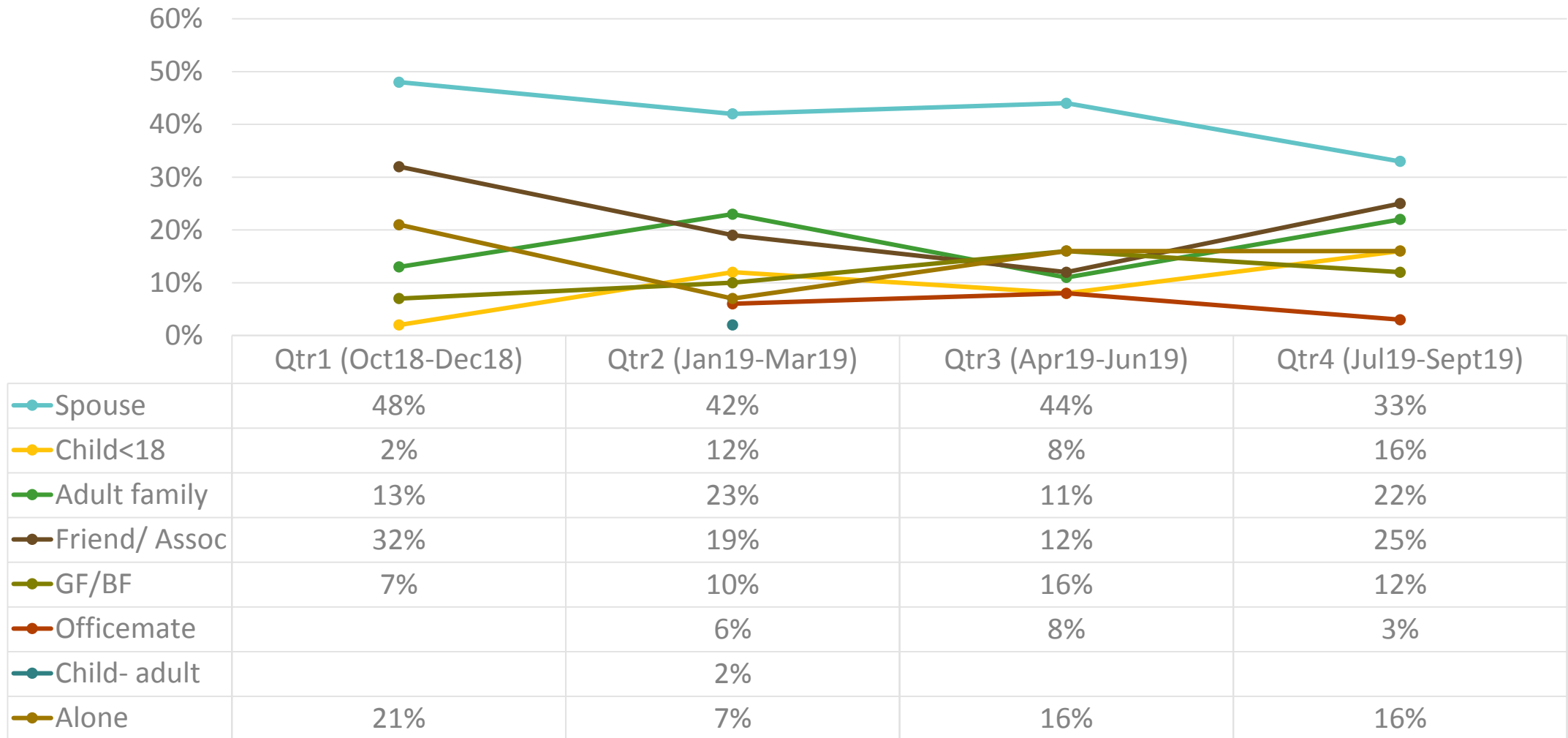
		TOTAL	QTR FY2019	MONTH FY2019		
		-	Qtr4 (Jul-19-Sept19)	Jul-19	Aug-19	Sept-19
D2	< HKD120K	6%	6%	7%	6%	6%
	HKD120K-240K	12%	12%	10%	13%	11%
	HKD240K-500K	30%	30%	33%	31%	22%
	HKD500K-1.0M	20%	20%	17%	21%	22%
	HKD1.0M-2.0M	21%	21%	27%	15%	28%
	HKD2.0M-3.0M	5%	5%		8%	6%
	HKD3.0M+	2%	2%		2%	6%
	No income	4%	4%	7%	4%	
	Total	100	100	30	52	18

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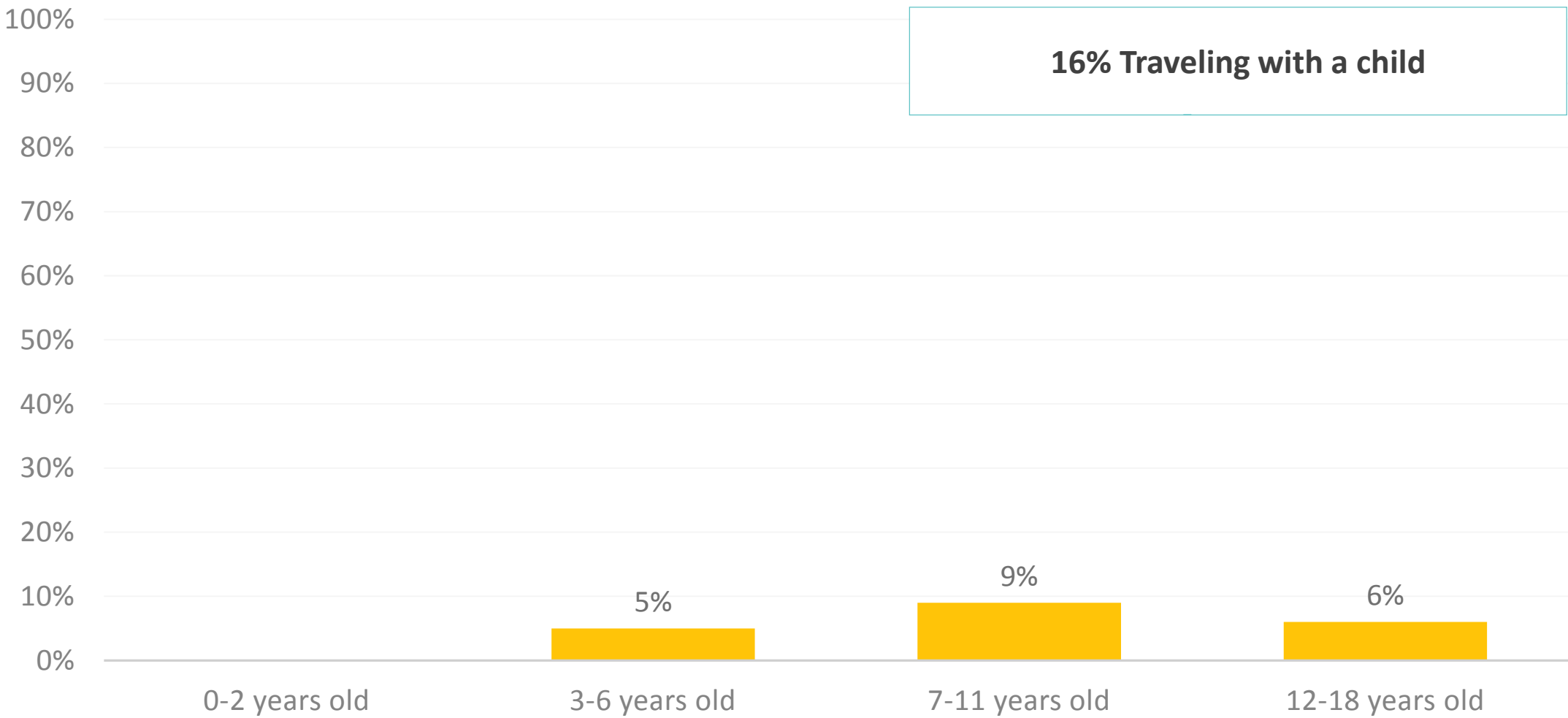
TRAVEL PARTY



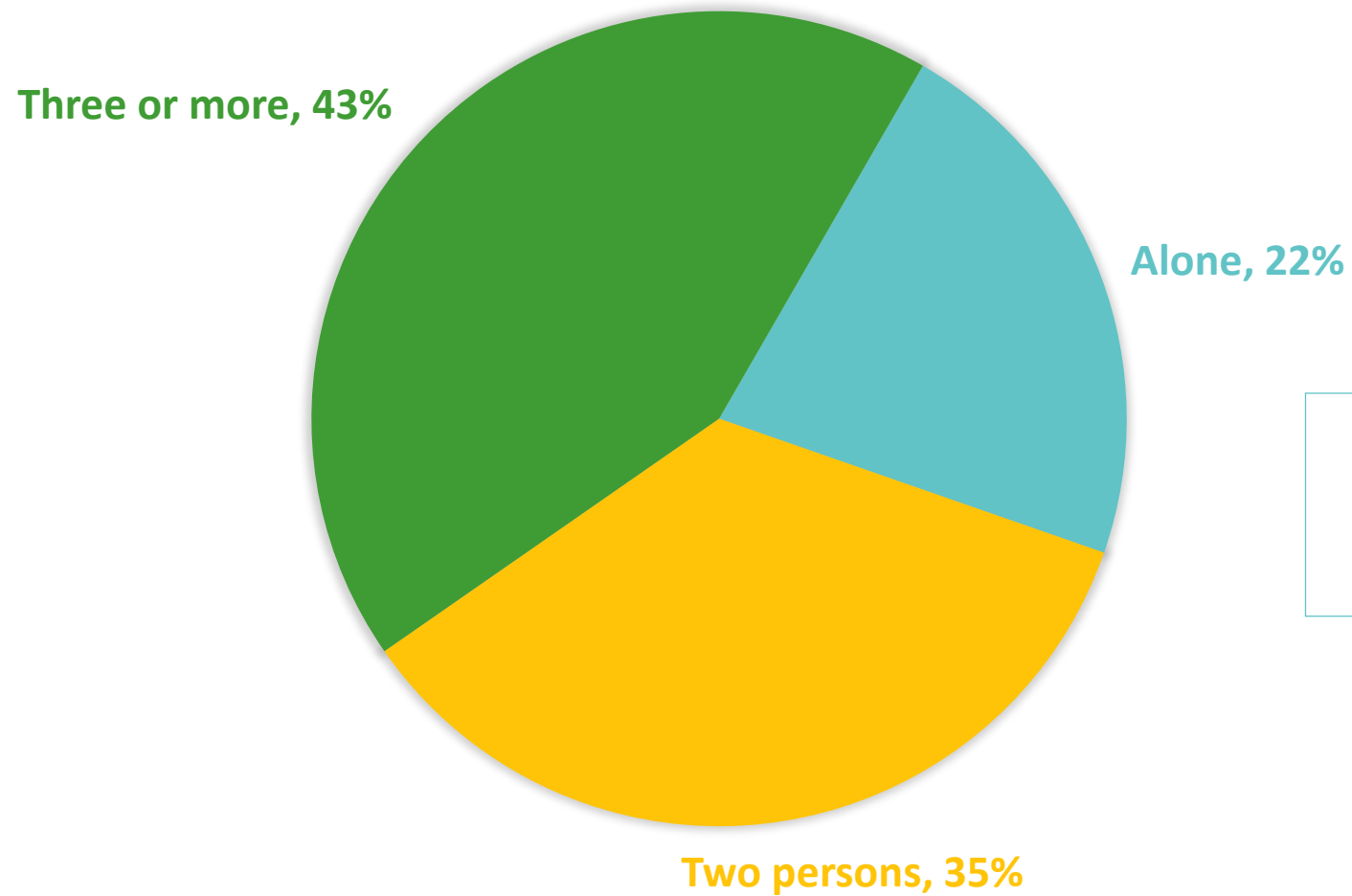
TRAVEL PARTY – TRACKING



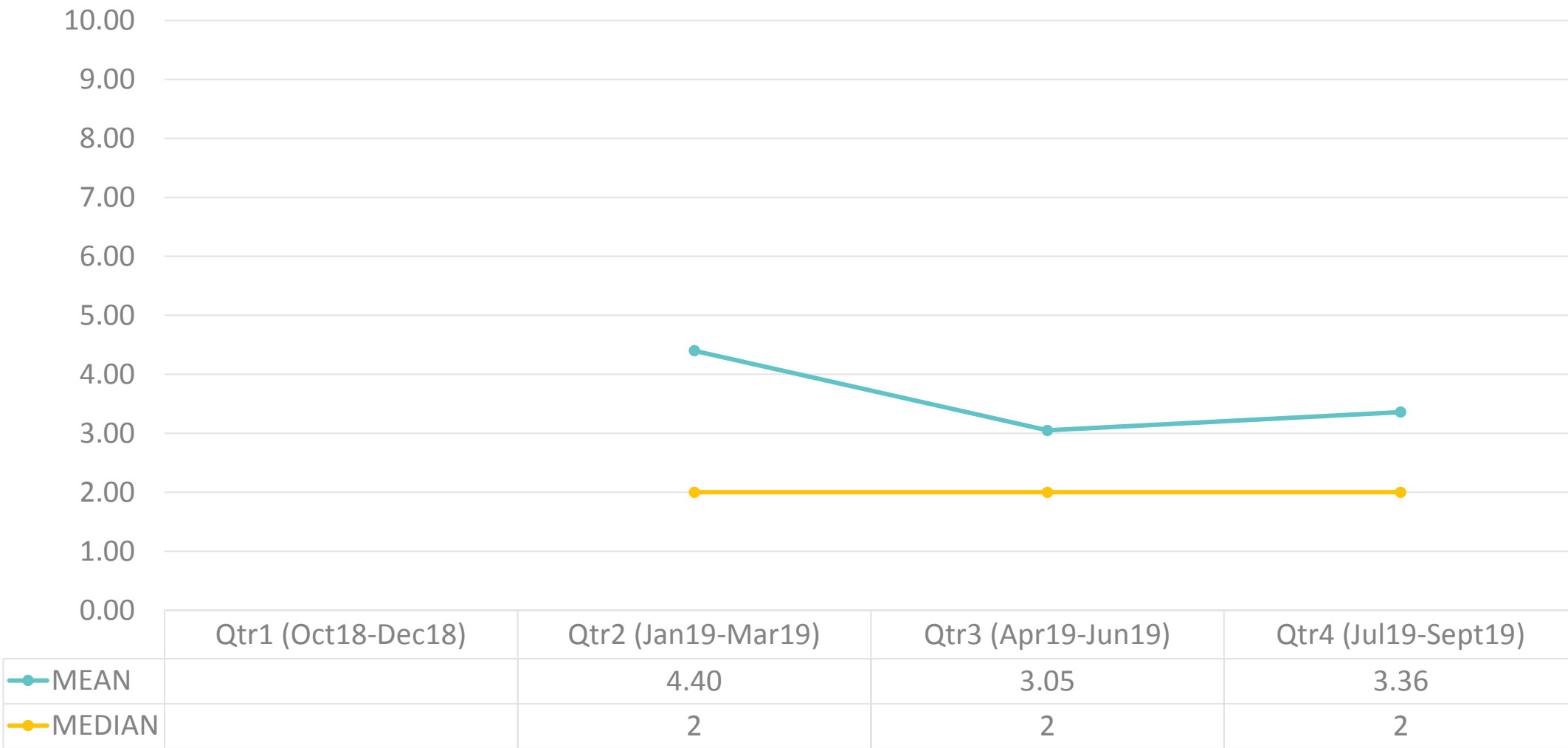
TRAVEL PARTY – CHILD UNDER 18



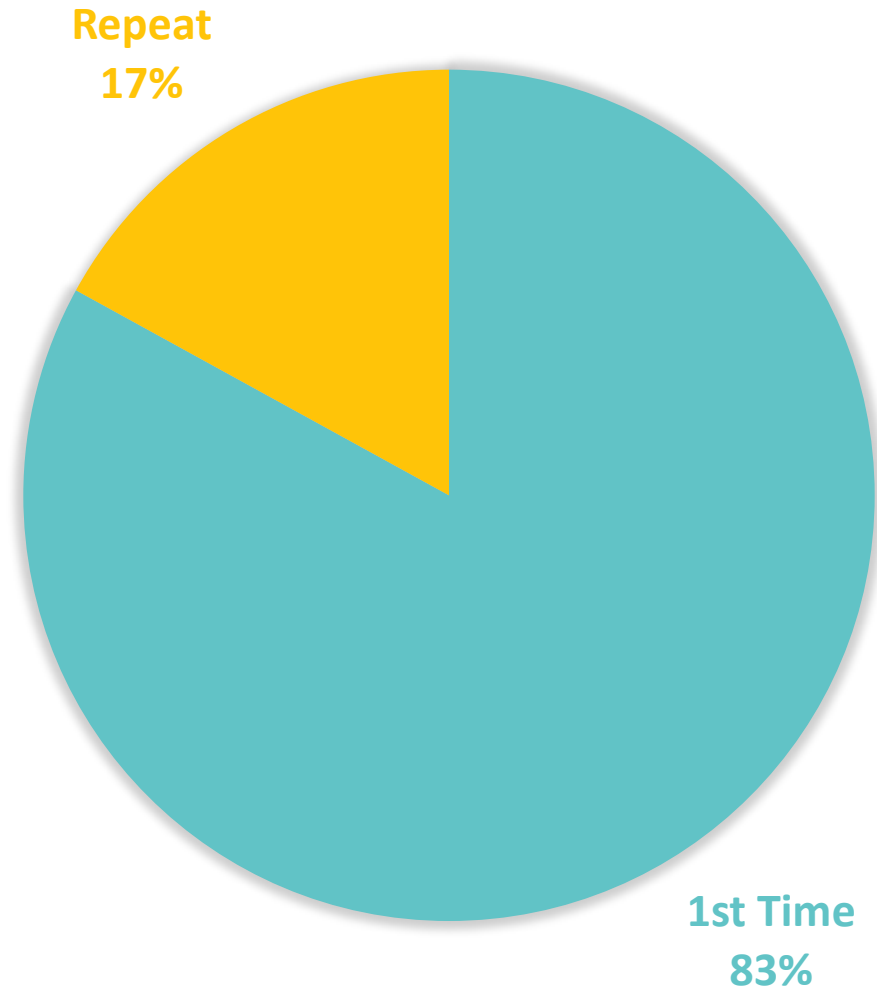
TRAVEL PARTY SIZE



TRAVEL PARTY SIZE – TRACKING

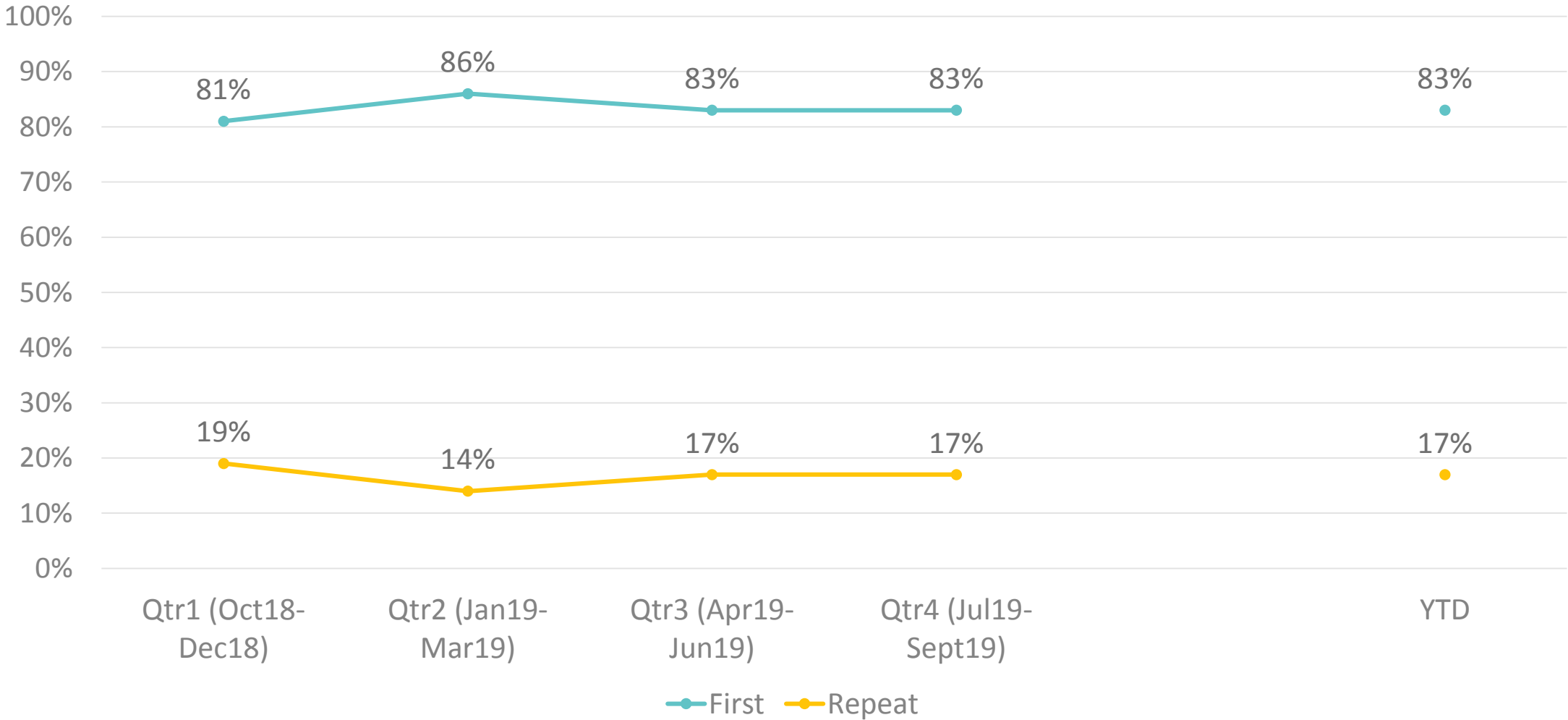


TRIPS TO GUAM



Mean = 1.56
Median = 1

TRIPS TO GUAM – TRACKING



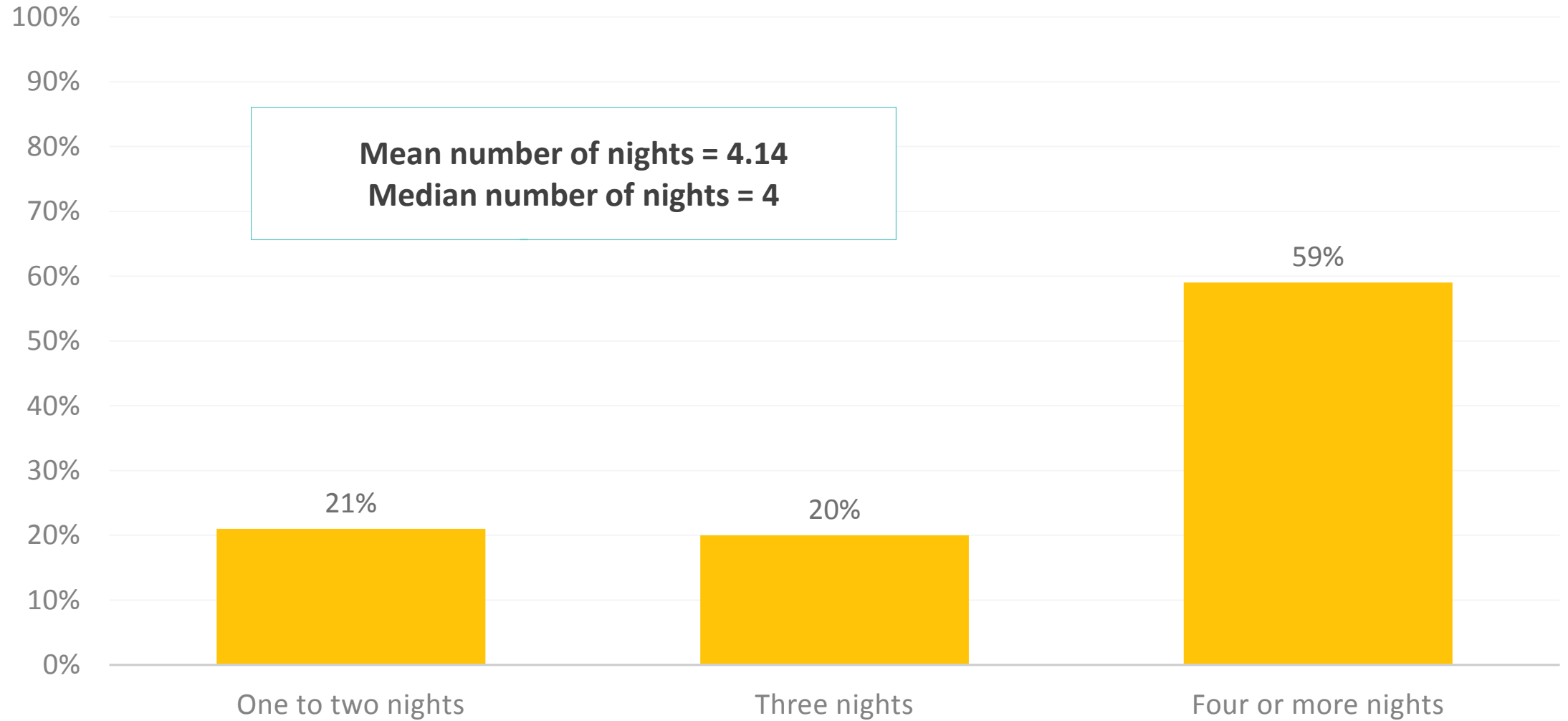
TRIPS TO GUAM – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
Q9 Including this trip, how many times have you been to Guam?

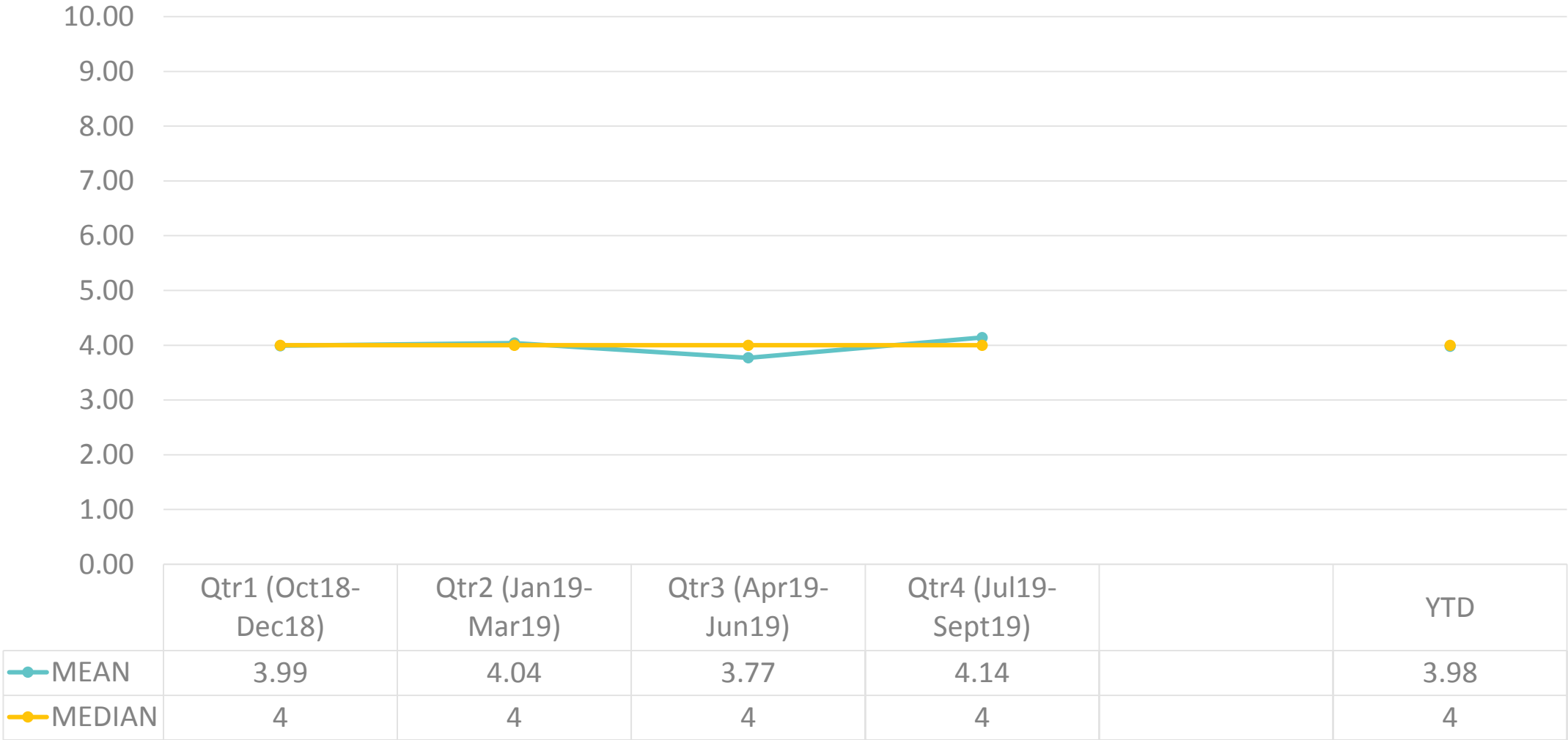
		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
Q9	1st time	83%	76%	84%	100%
	Repeat	17%	24%	16%	
	Total	100	33	51	
Q9	Mean	1.56	2.00	1.25	2.00
	Median	1	1	1	2

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LENGTH OF STAY



LENGTH OF STAY – TRACKING



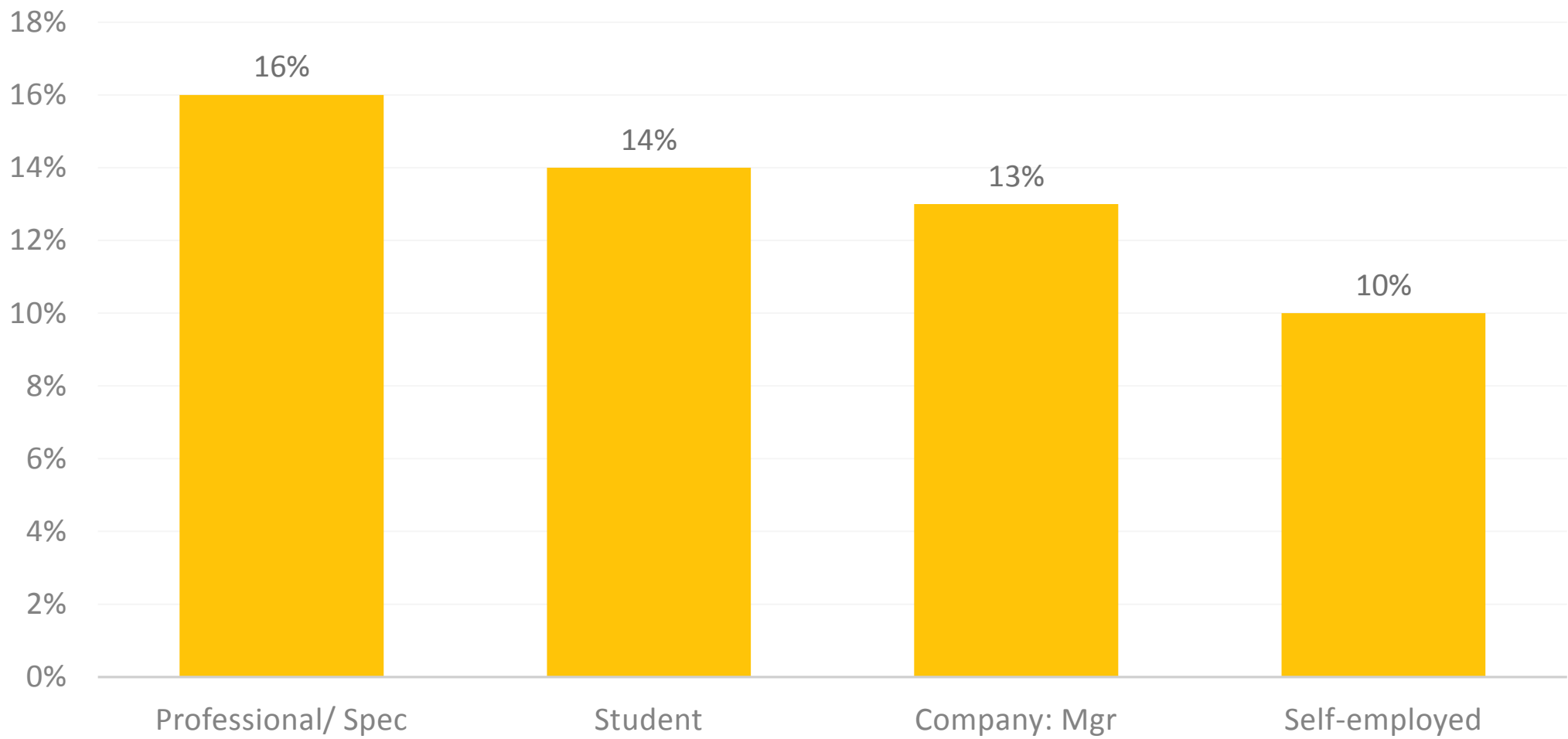
LENGTH OF STAY – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
SA How many nights did you stay on Guam?

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
SA	1-2 nights	21%	24%	10%	100%
	3 nights	20%	30%	25%	
	4+	59%	45%	65%	
	Total	100	33	51	1
SA	Mean	4.14	3.97	4.55	5.00
	Median	4	3	4	5

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OCCUPATION – Top Responses (10%+)



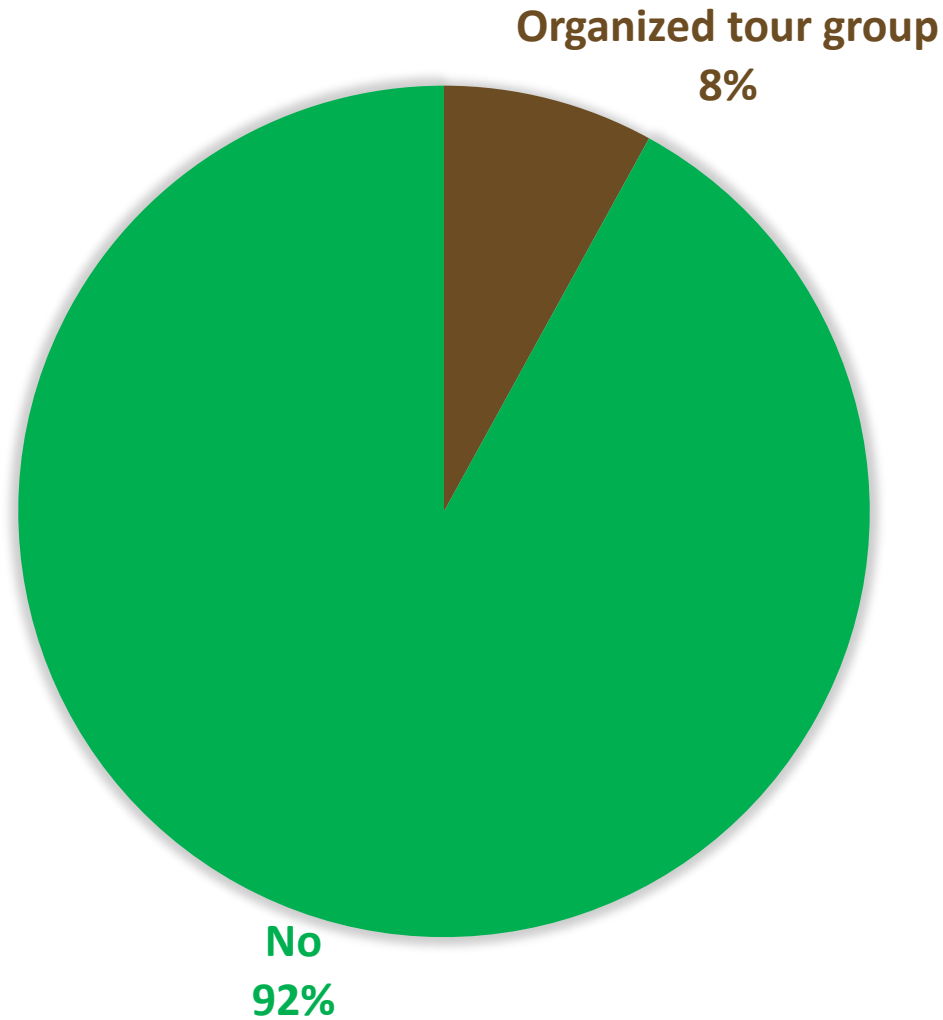


SECTION 2

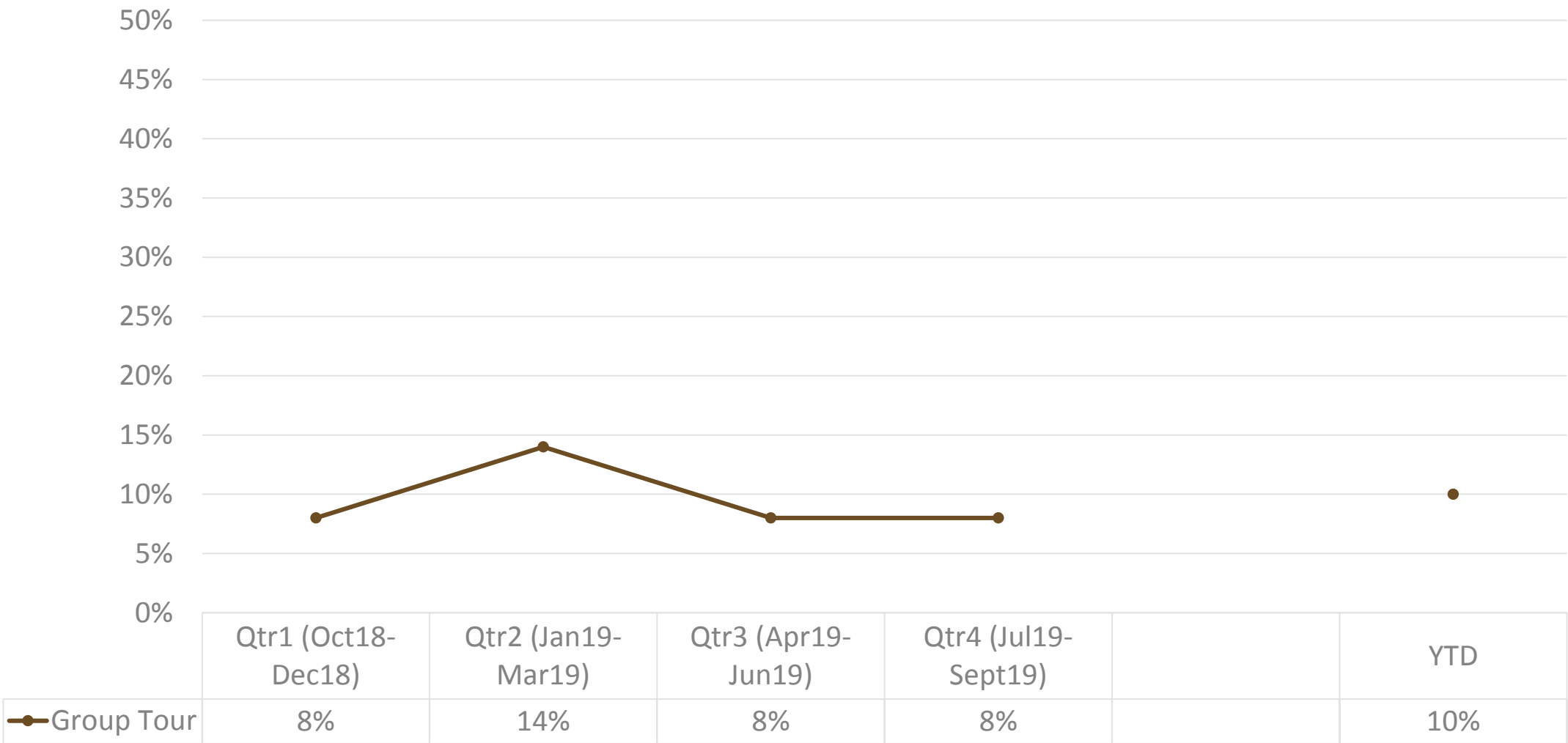
TRAVEL PLANNING



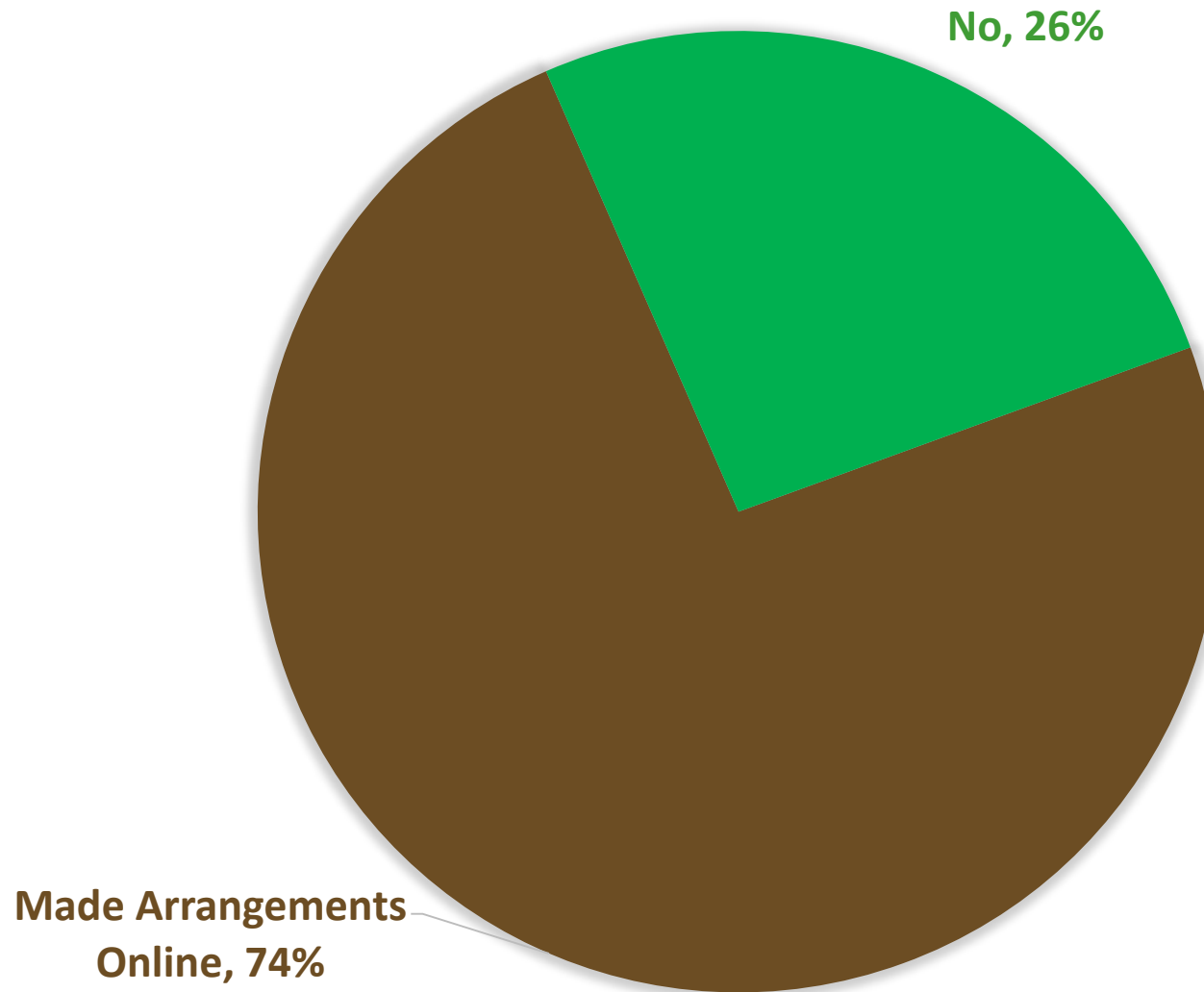
ORGANIZED TOUR GROUP



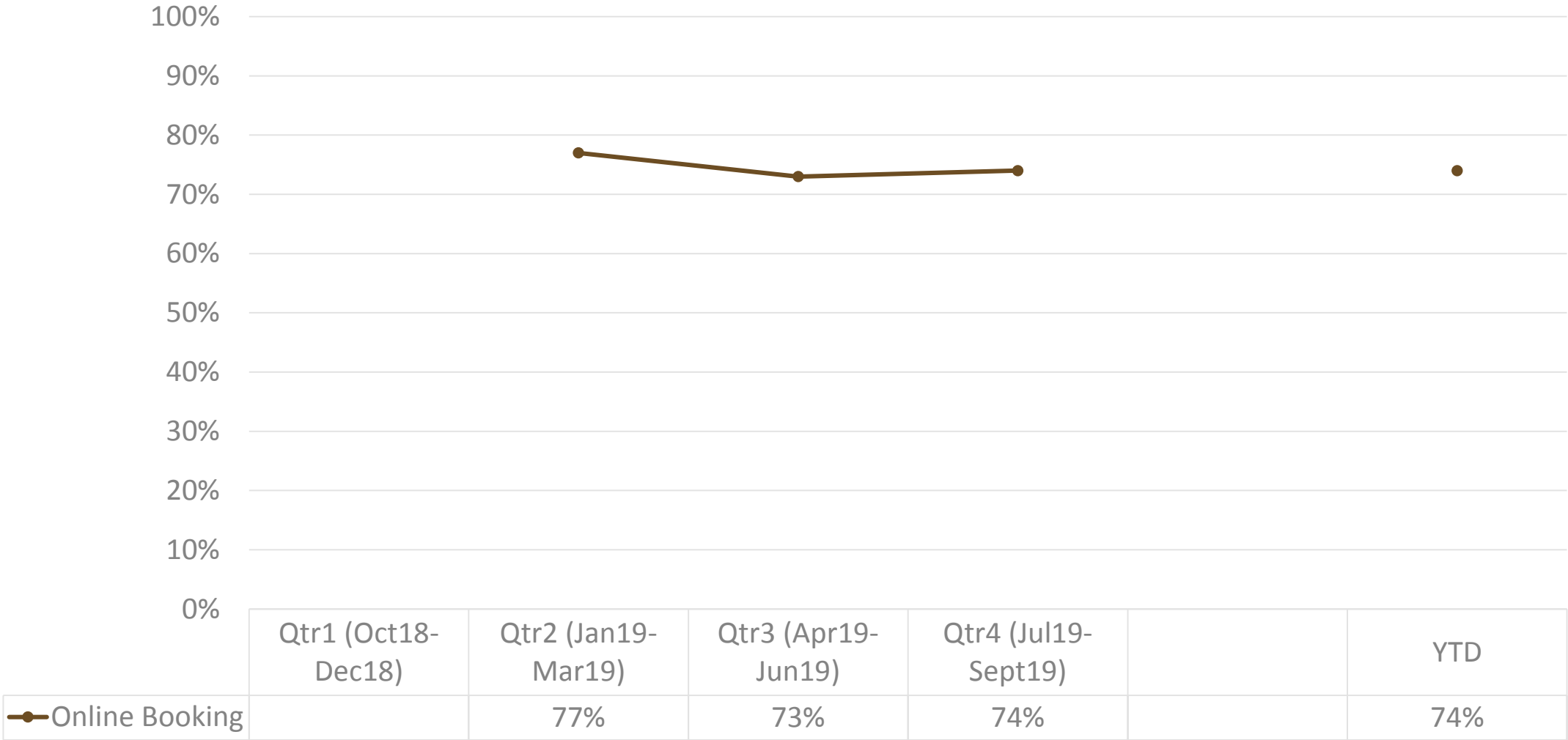
ORGANIZED TOUR GROUP – TRACKING



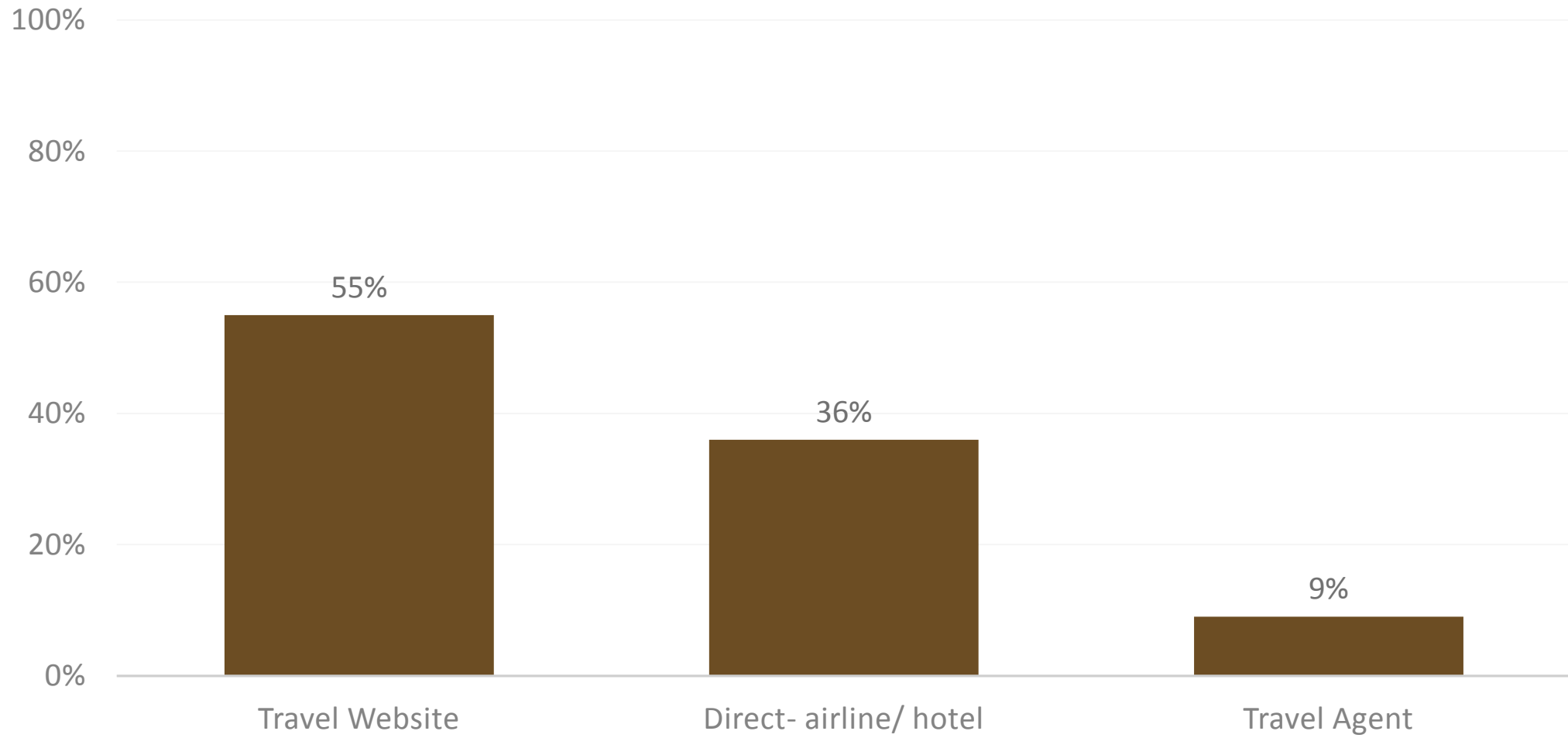
ONLINE BOOKING



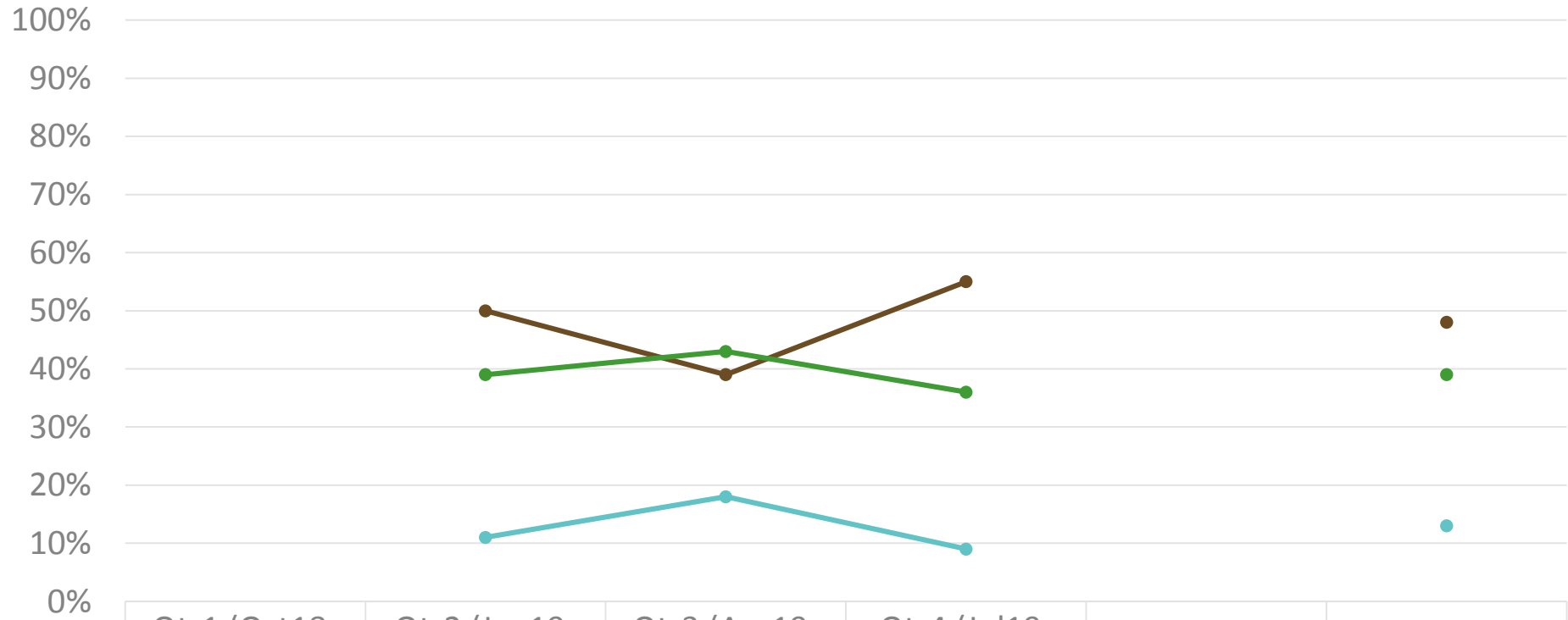
ONLINE BOOKING – TRACKING



TRAVEL ARRANGEMENTS

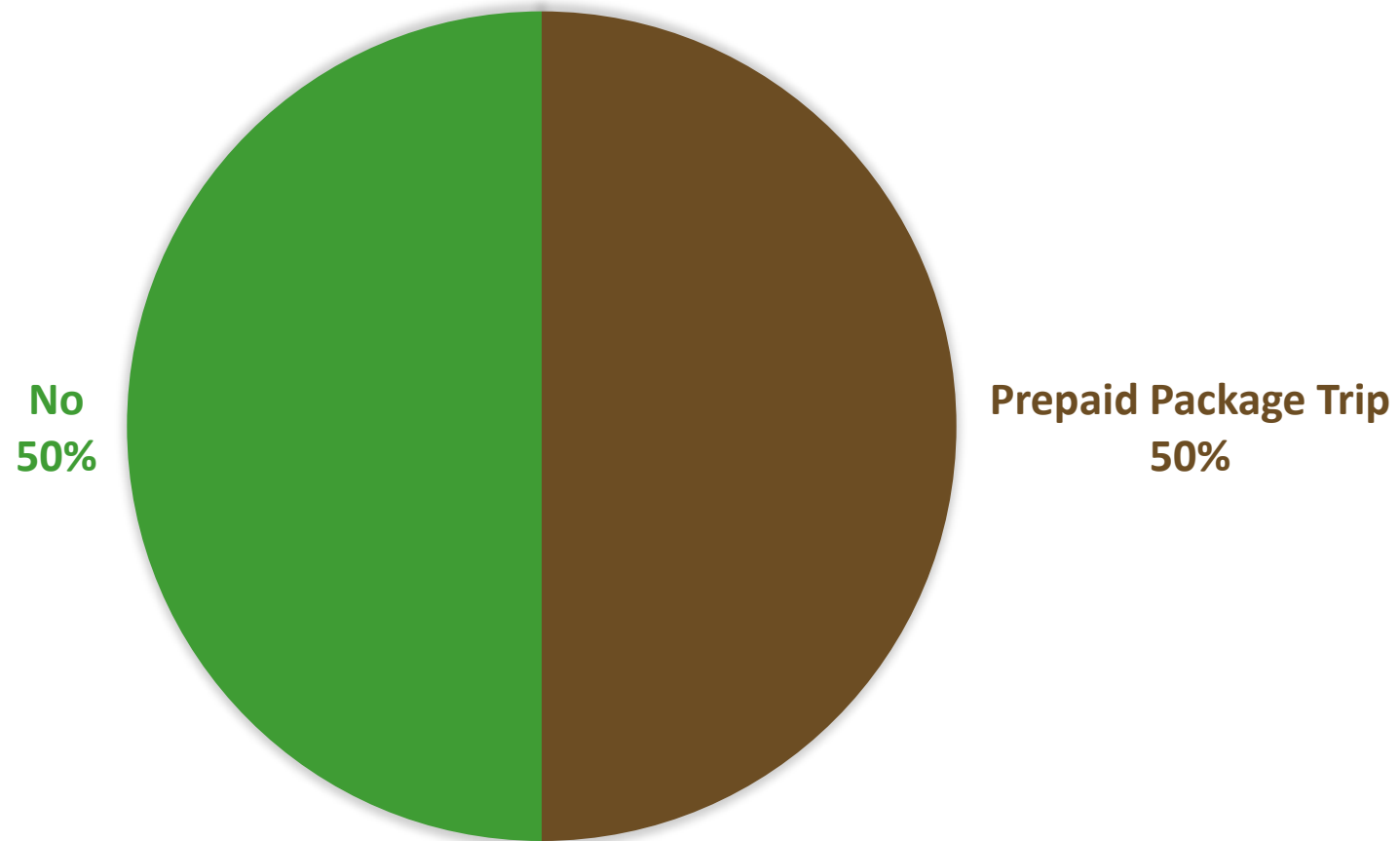


TRAVEL ARRANGEMENTS – TRACKING

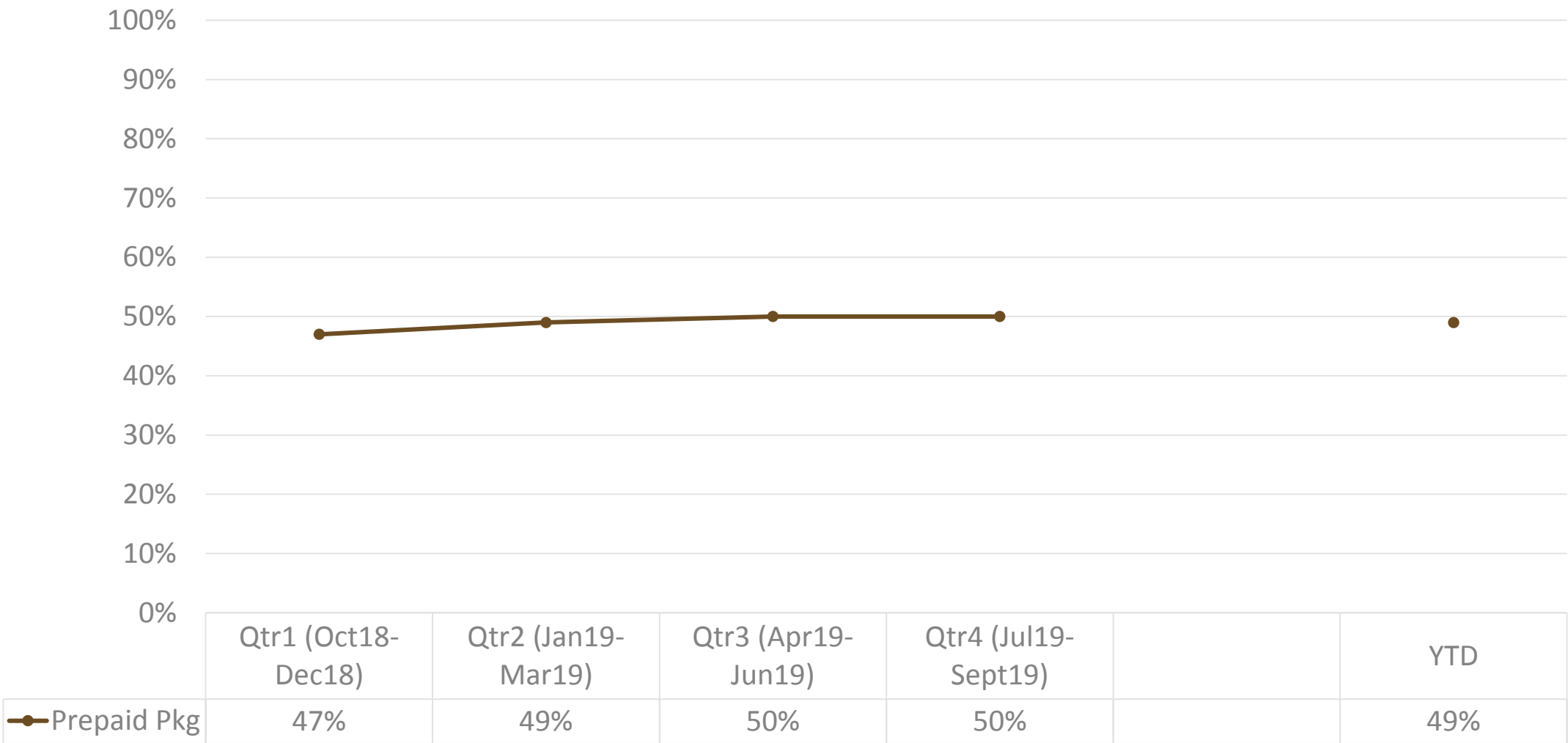


	Qtr1 (Oct18-Dec18)	Qtr2 (Jan19-Mar19)	Qtr3 (Apr19-Jun19)	Qtr4 (Jul19-Sept19)		YTD
Travel Agent		11%	18%	9%		13%
Travel Website		50%	39%	55%		48%
Direct- Airline/ Hotel		39%	43%	36%		39%

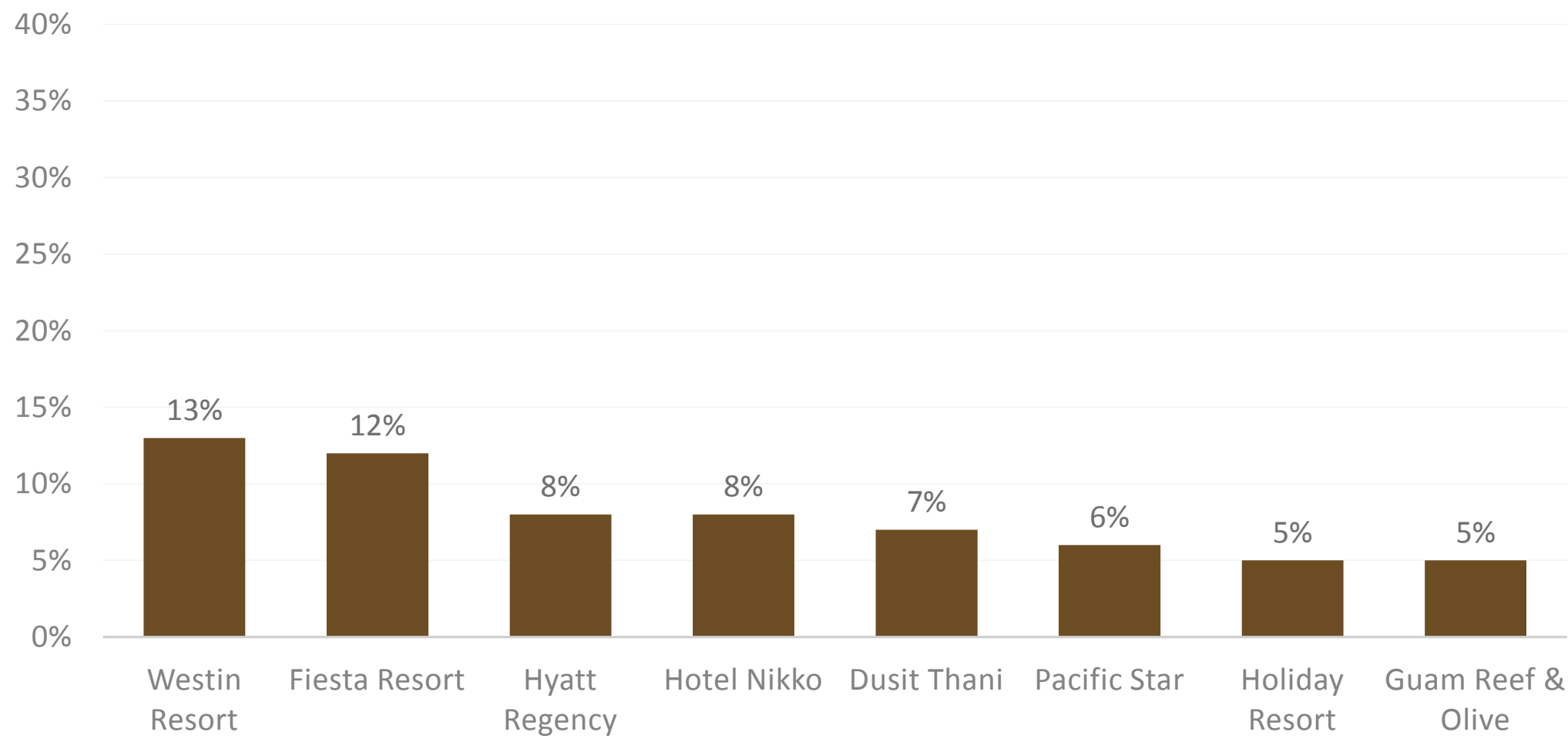
PREPAID PACKAGE TRIP



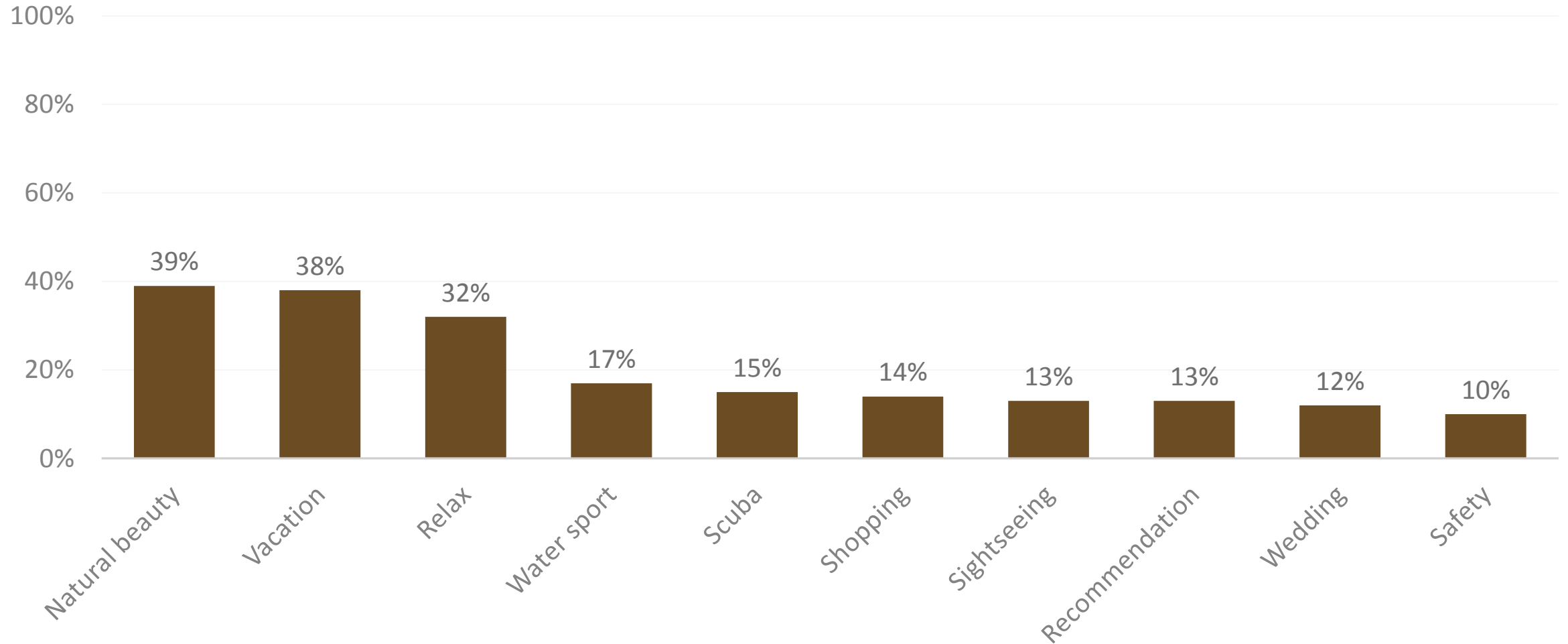
PREPAID PACKAGE TRIP



ACCOMMODATIONS (5%+)



TRAVEL MOTIVATIONS (10%+)



TRAVEL MOTIVATIONS – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
Q8 What top three reasons motivated you to travel to Guam on this trip?

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
Q8	Beautiful seas, beaches, tropical climate	39%	30%	45%	100%
	Vacation	38%	33%	39%	
	Just to relax	32%	48%	31%	
	Water sports (snorkeling, windsurfing, parasailing)	17%	12%	27%	
	Scuba diving	15%	9%	22%	
	Shopping	14%	24%	12%	
	Recommendation of friend/ relative/ travel agency	13%	12%	14%	
	Sightseeing/ visiting tourist spots	13%	6%	10%	
	To Get Married/ attend Wedding	12%	3%	12%	
	It is a safe place to spend a vacation	10%	6%	6%	
	A previous visit	7%	9%	8%	100%
	Short travel time (not too far from home)	5%	9%	4%	
	Career certification/ testing	5%	9%	4%	
	Company/ business trip	4%	9%		
	To visit friends or relatives	2%	6%	2%	
	Convention/ conference/ trade show/ meeting	2%	3%		
	Adventure	2%	3%	2%	
	Honeymoon	1%	3%	2%	100%
	Social Media networks	1%			
	Travel shows/ agents	1%			
	Total	100	33	51	1

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SECTION 3

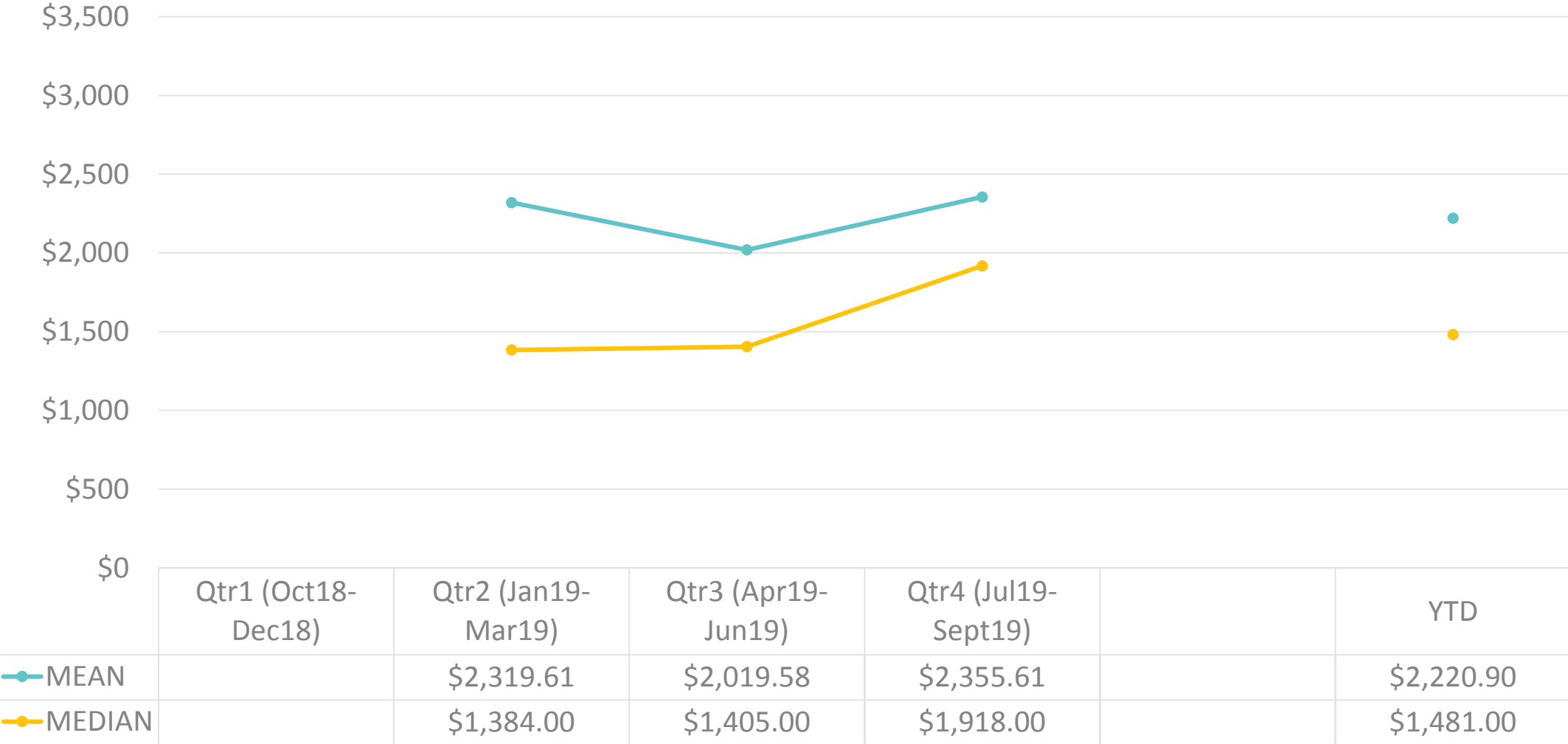
EXPENDITURES



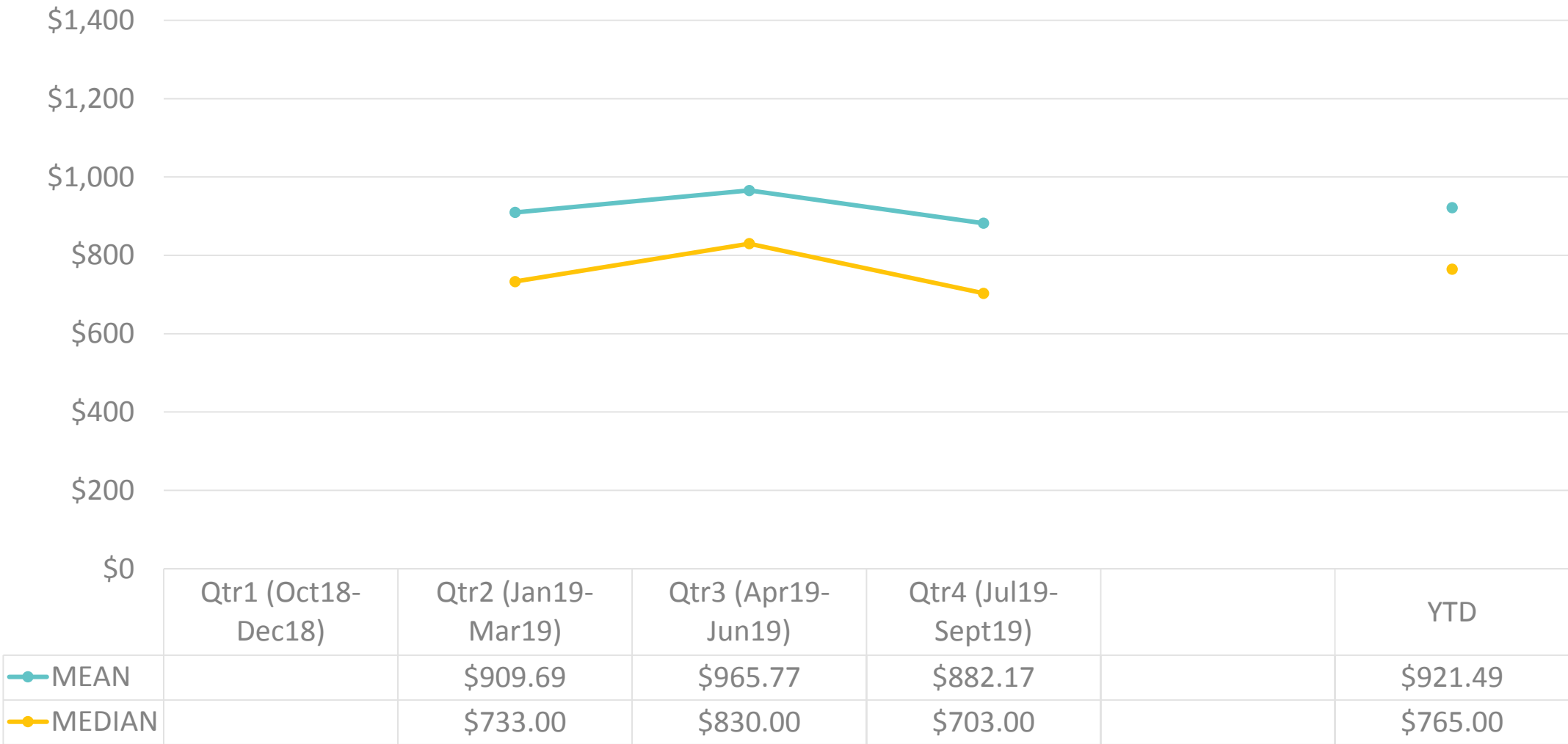
PREPAID PACKAGE EXPENDITURES

- \$2,355.61 = overall mean average prepaid package expense (for entire travel party) by respondent
- \$882.17 = overall mean average **per person** prepaid package expenditures

PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING



PREPAID PACKAGE – PER PERSON EXPENSE TRACKING



PREPAID PACKAGE – PER PERSON EXPENSE SEGMENTATION

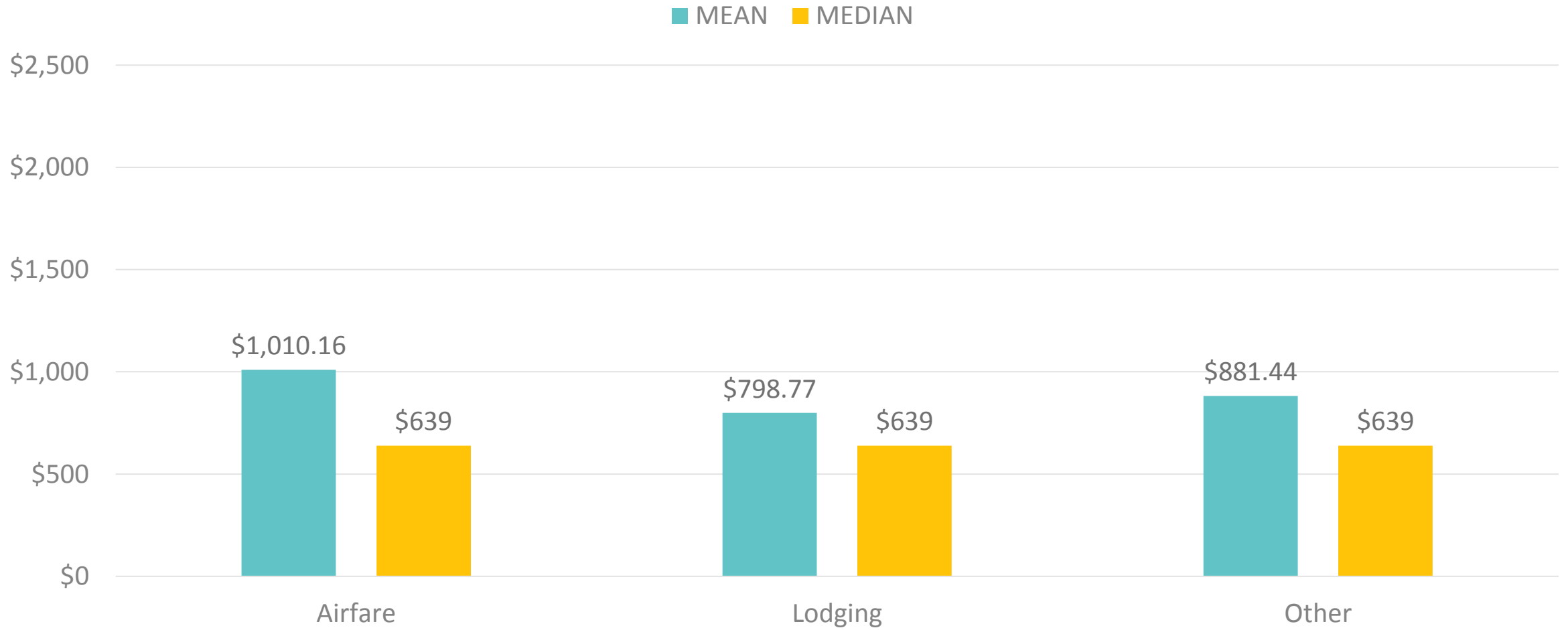
GVB VISITOR SATISFACTION STUDY

Q20 How much did the total prepaid package trip cost for you and other members of your covered travel party?

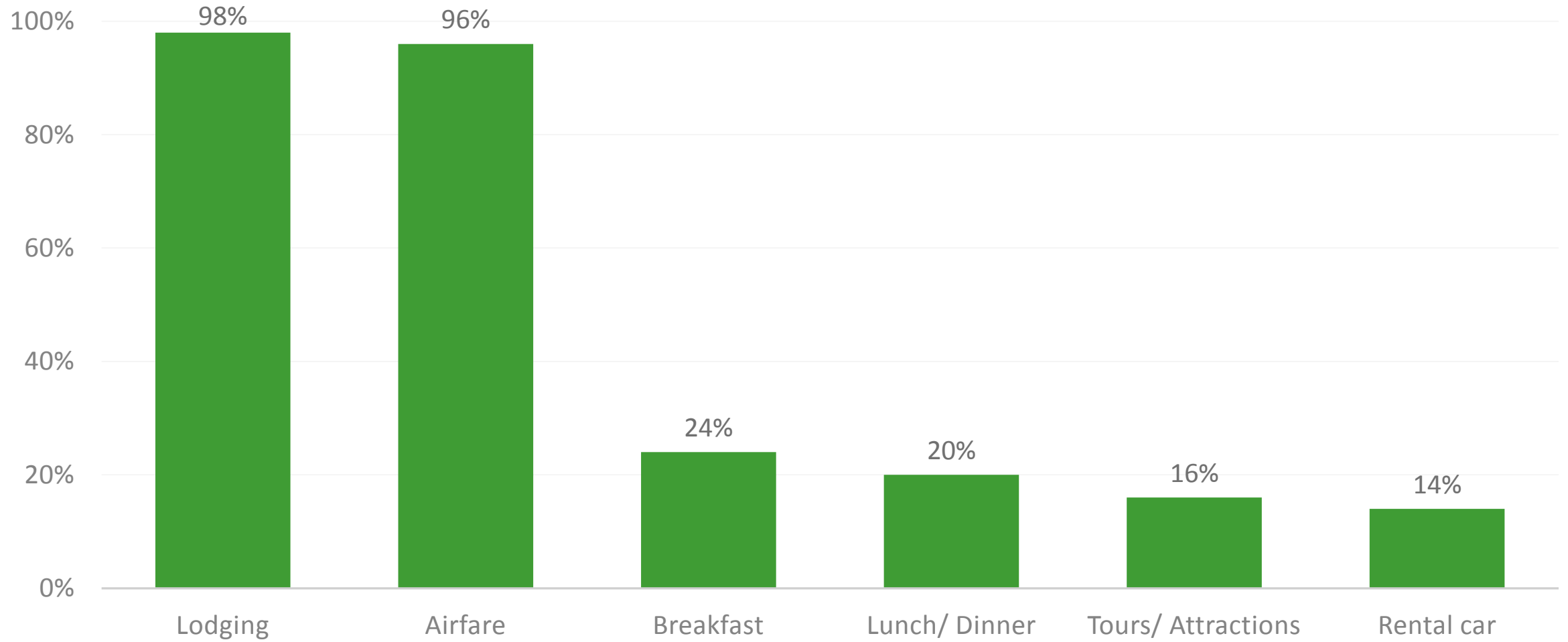
		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
PREPAID PKG TRAVEL PARTY	Mean	\$2,355.61	\$2,392.37	\$2,851.57	\$1,406.65
	Median	\$1,918	\$1,535	\$2,558	\$1,407

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PREPAID PACKAGE – BREAKDOWN



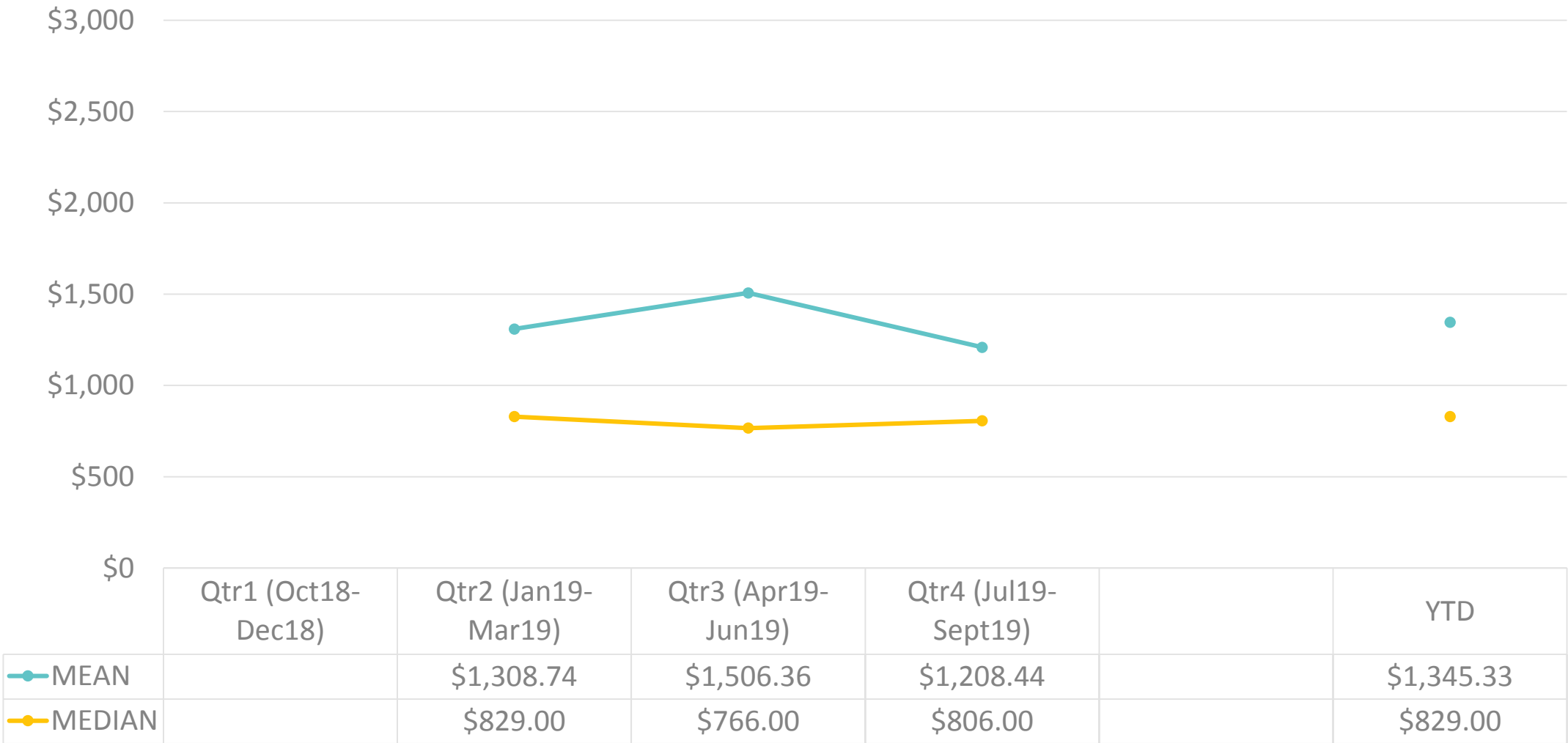
PREPAID PACKAGE – BREAKDOWN



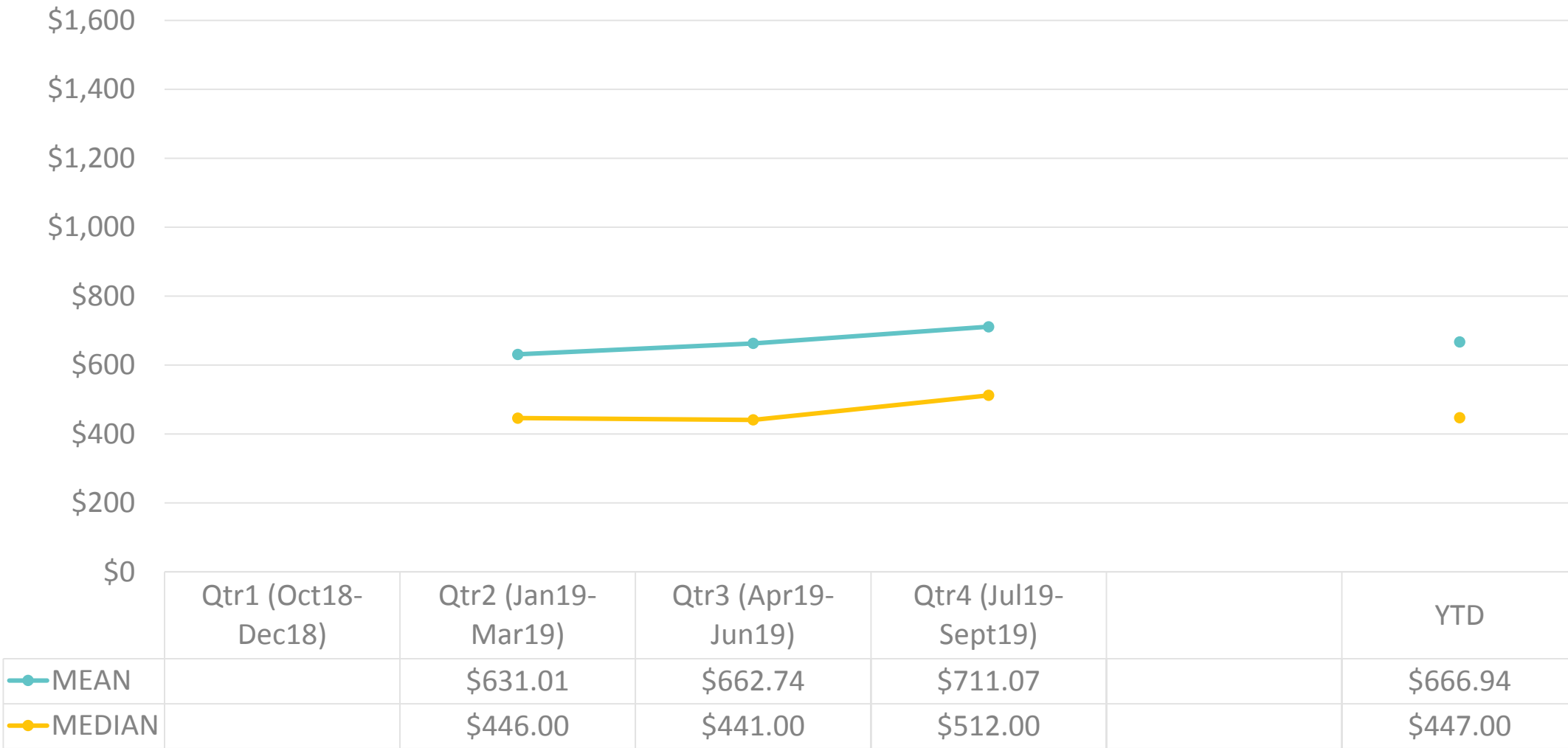
AIRFARE – FIT TRAVELER

- \$1,208.44 = overall mean average airfare expense (for entire travel party) by respondent
- \$711.07 = overall mean average **per person** airfare expenditures

AIRFARE – FIT TRAVELER (GROUP) TRACKING



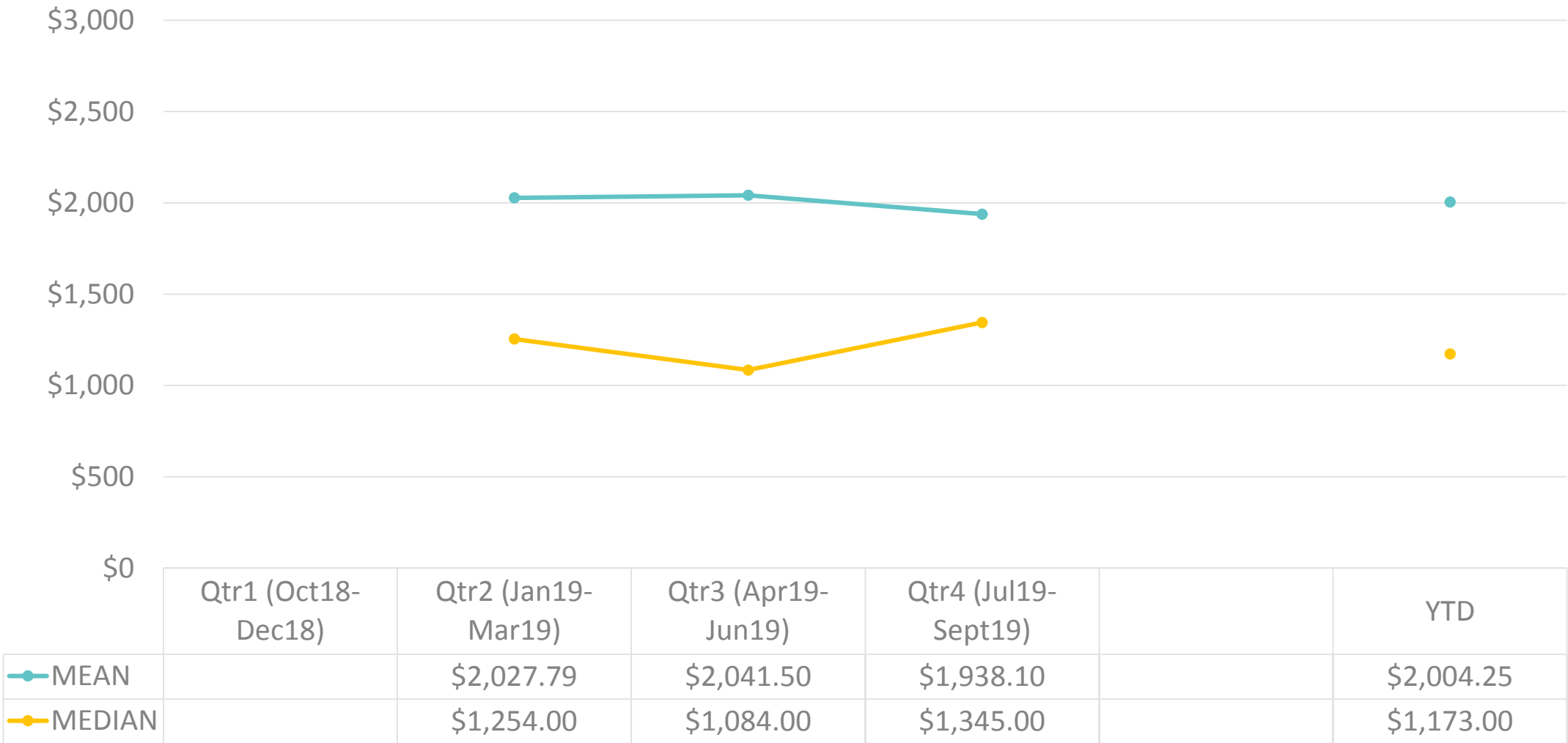
AIRFARE – FIT TRAVELER (Per Person) TRACKING



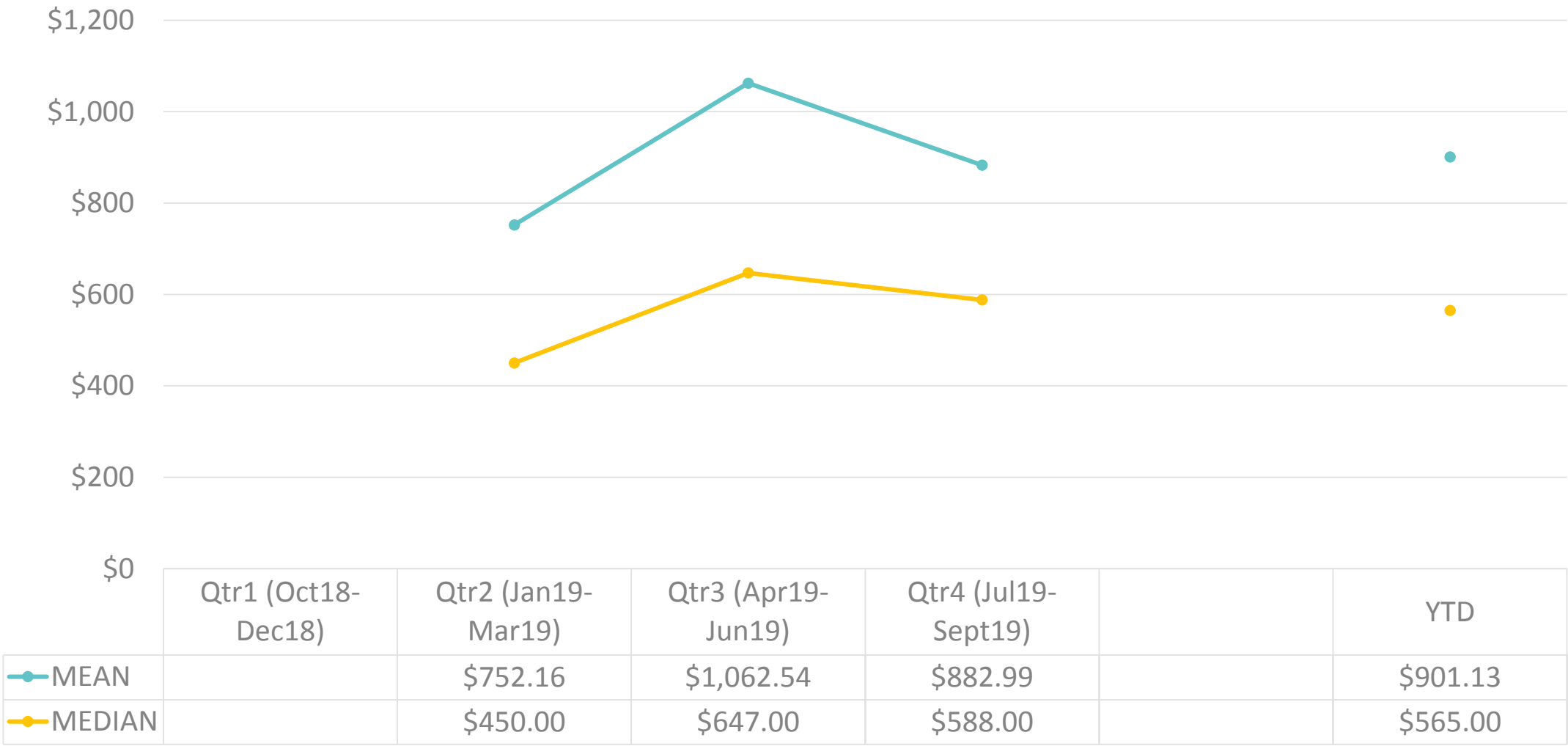
ONISLE EXPENDITURES

- \$1,938.10 = overall mean average expense (for entire travel party) by respondent
- \$882.99 = overall mean average **per person** expenditures

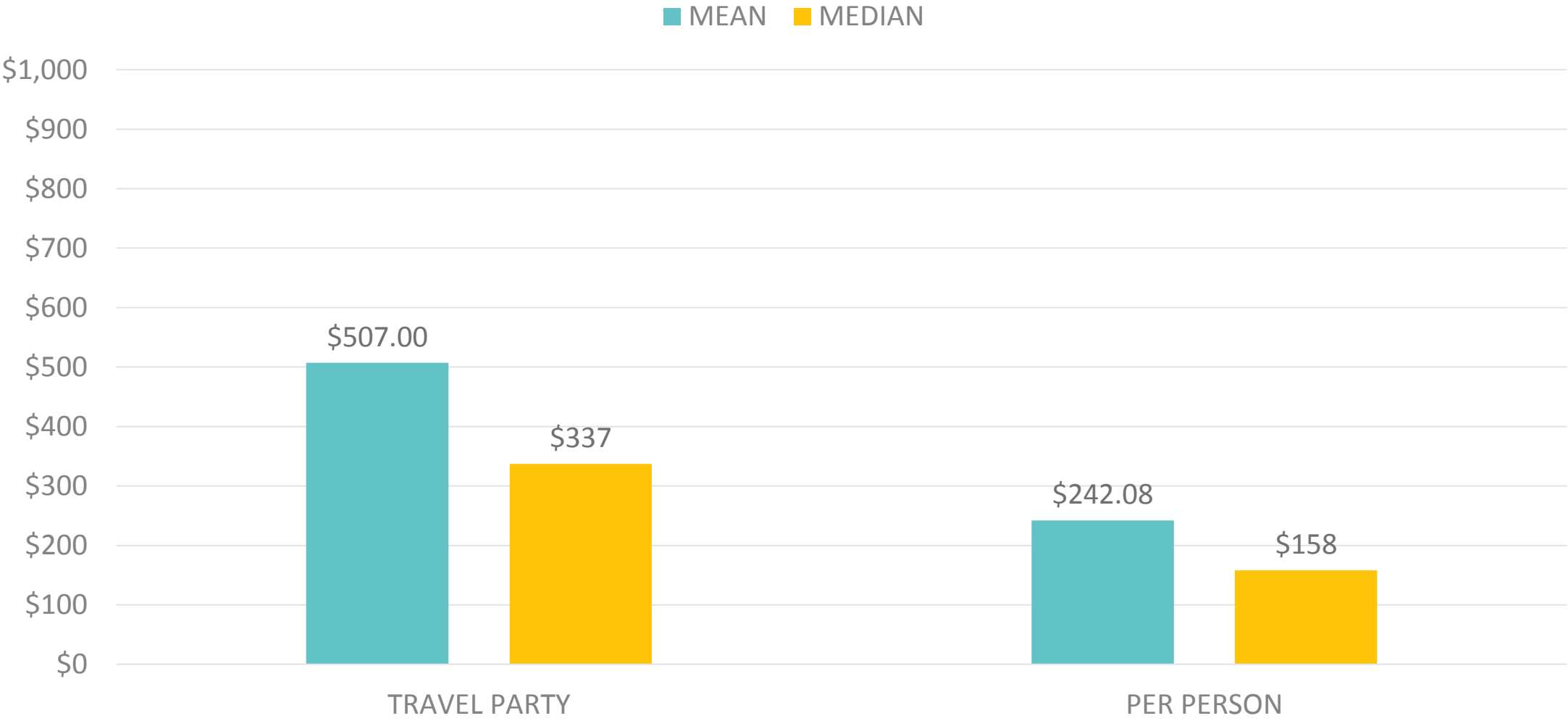
ONISLE – TRAVEL PARTY TRACKING



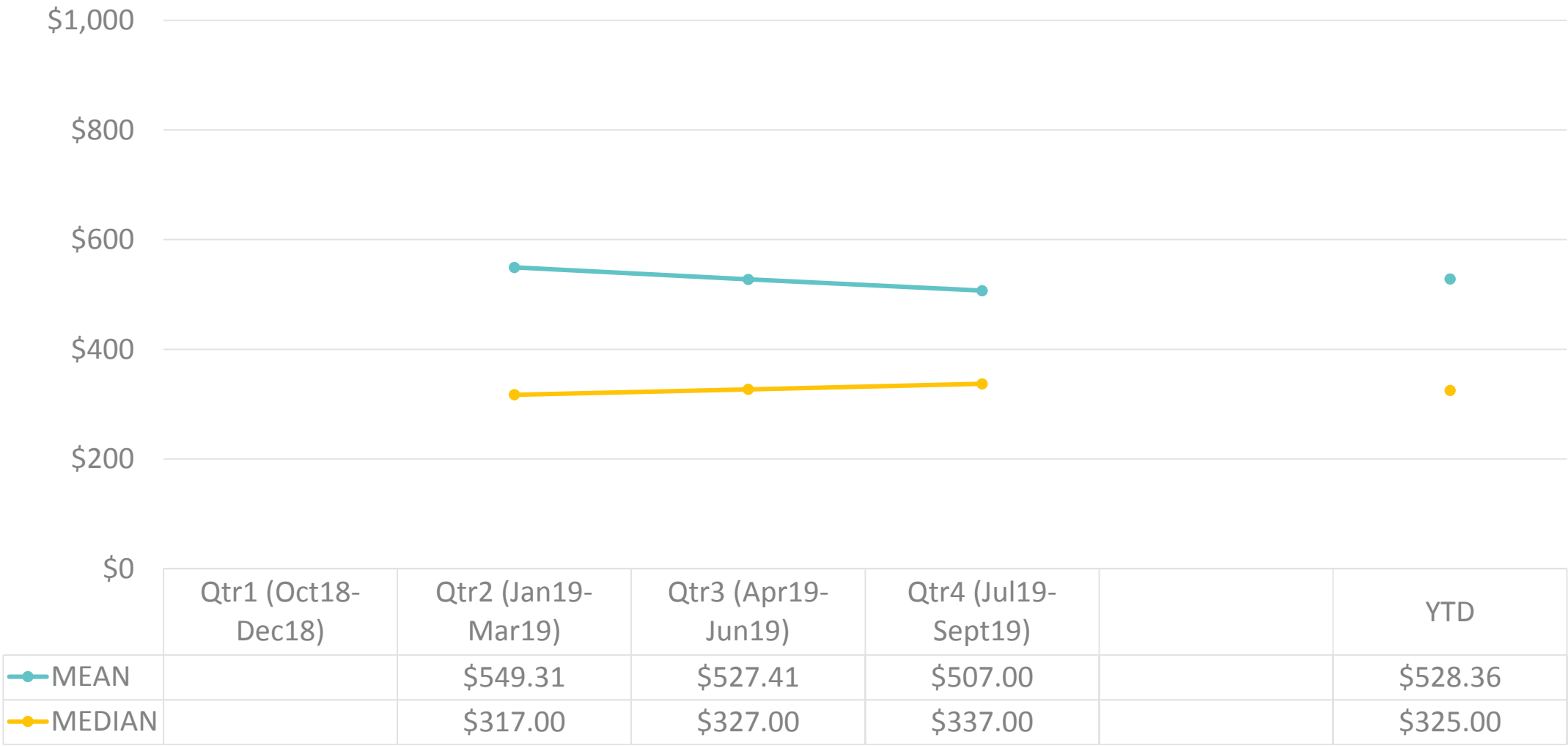
ONISLE – PER PERSON TRACKING



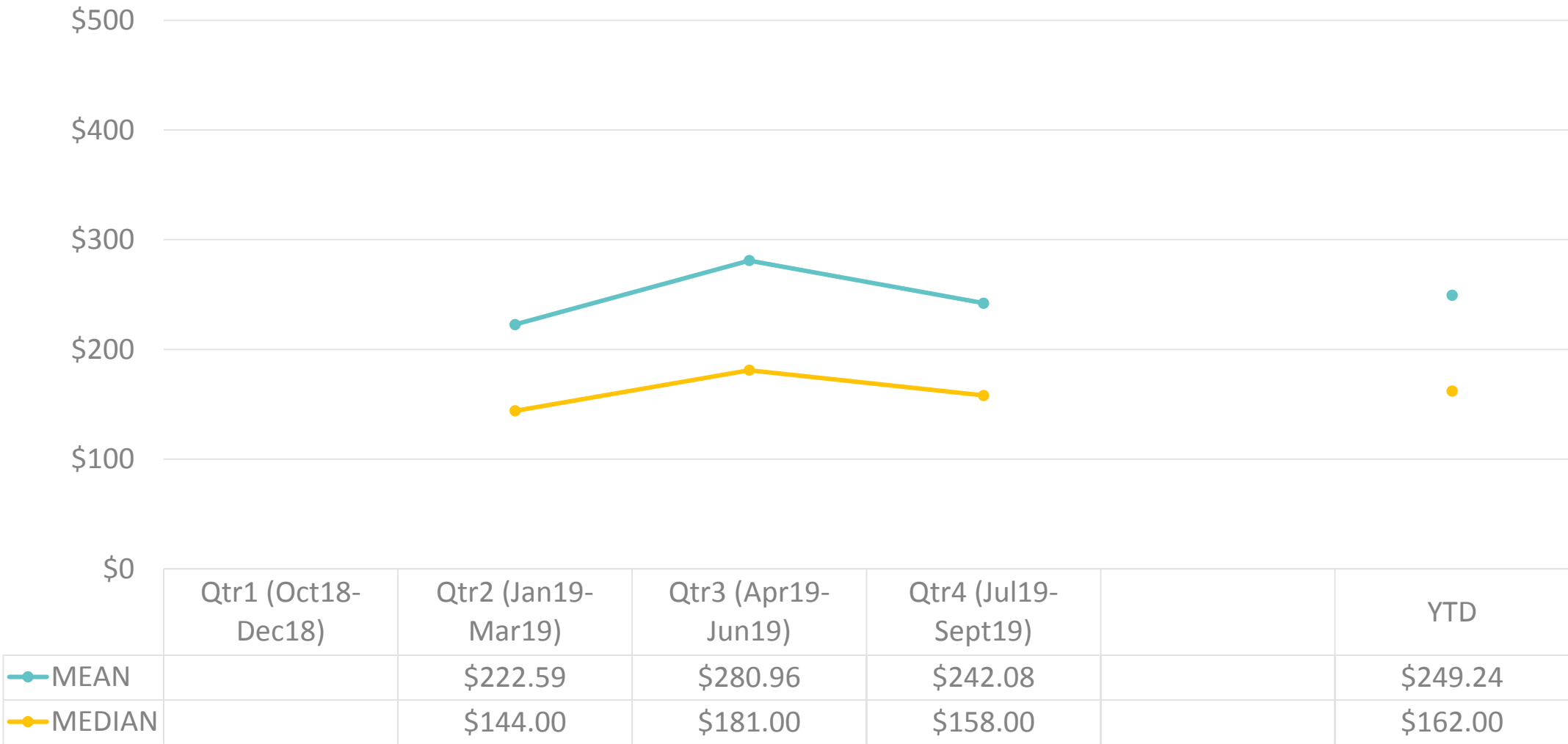
ONISLE – PER DAY SPENDING



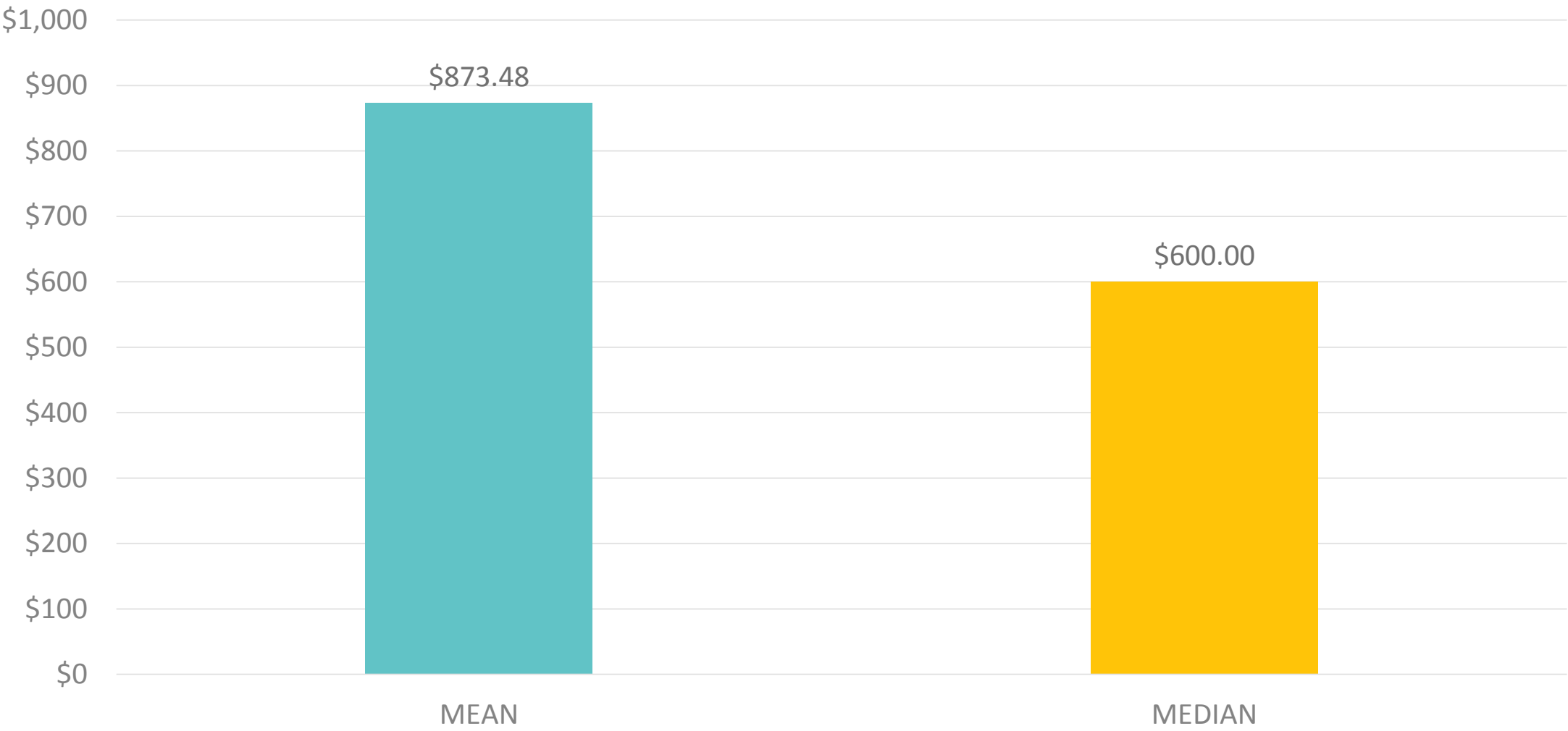
ONISLE – TRAVEL PARTY/ PER DAY TRACKING



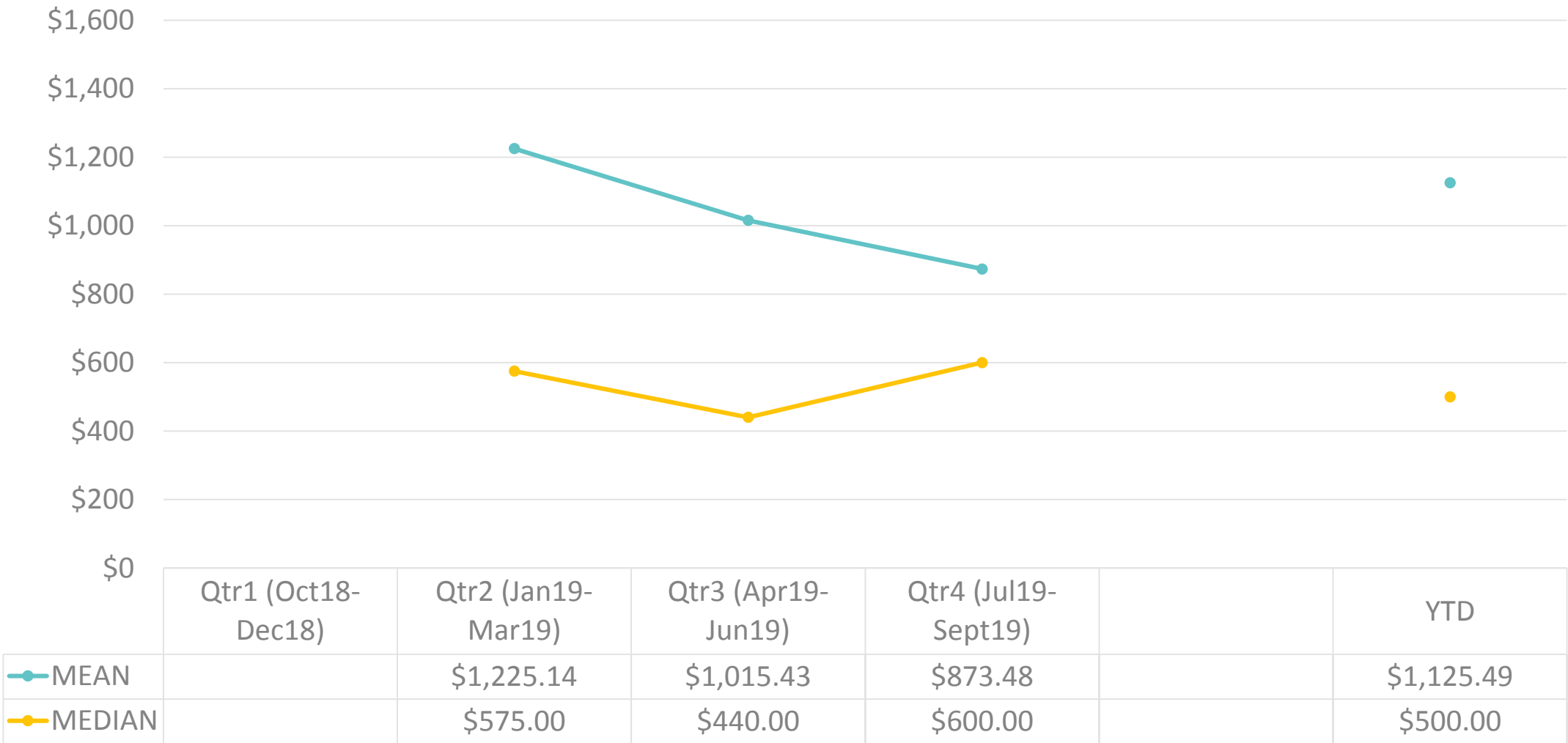
ONISLE – PER PERSON/ PER DAY TRACKING



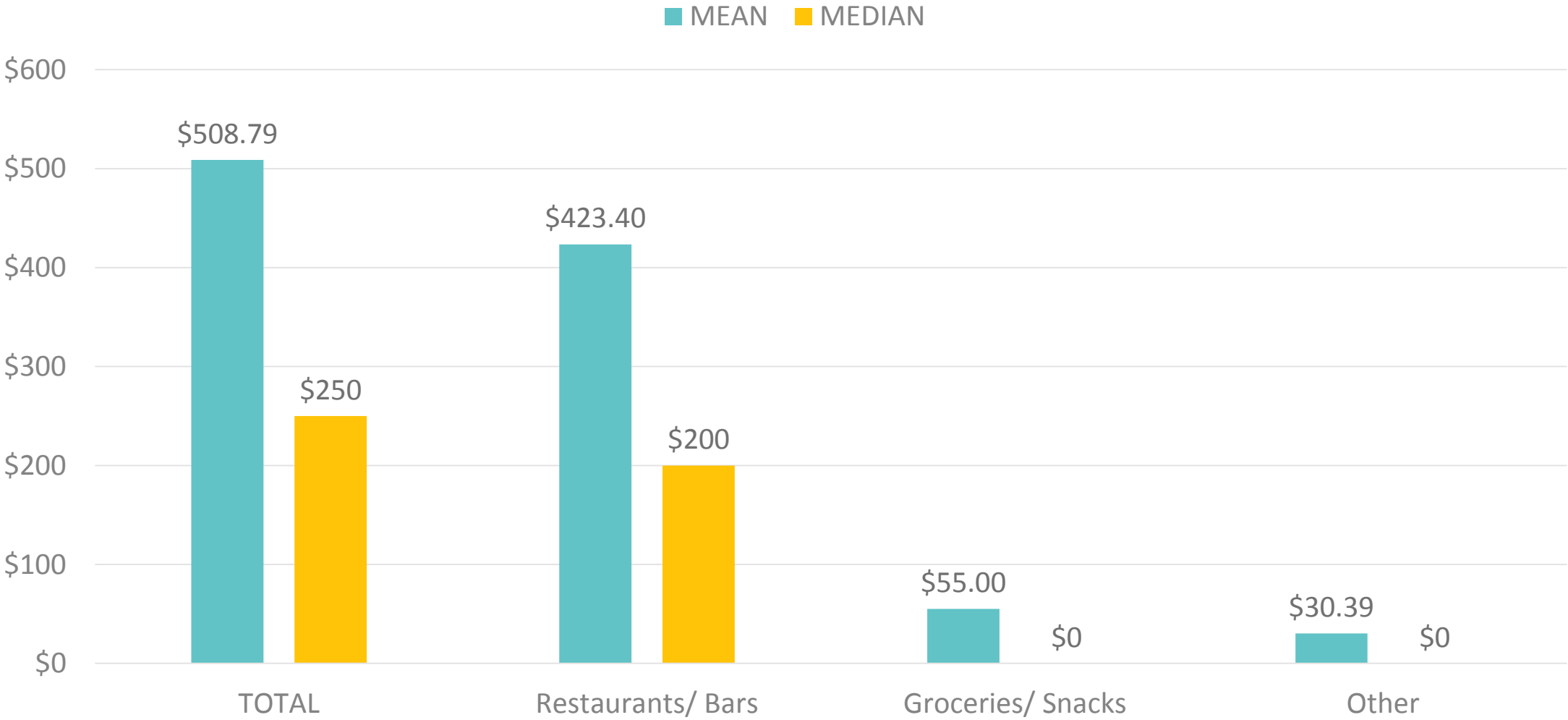
ONISLE – ACCOMMODATIONS



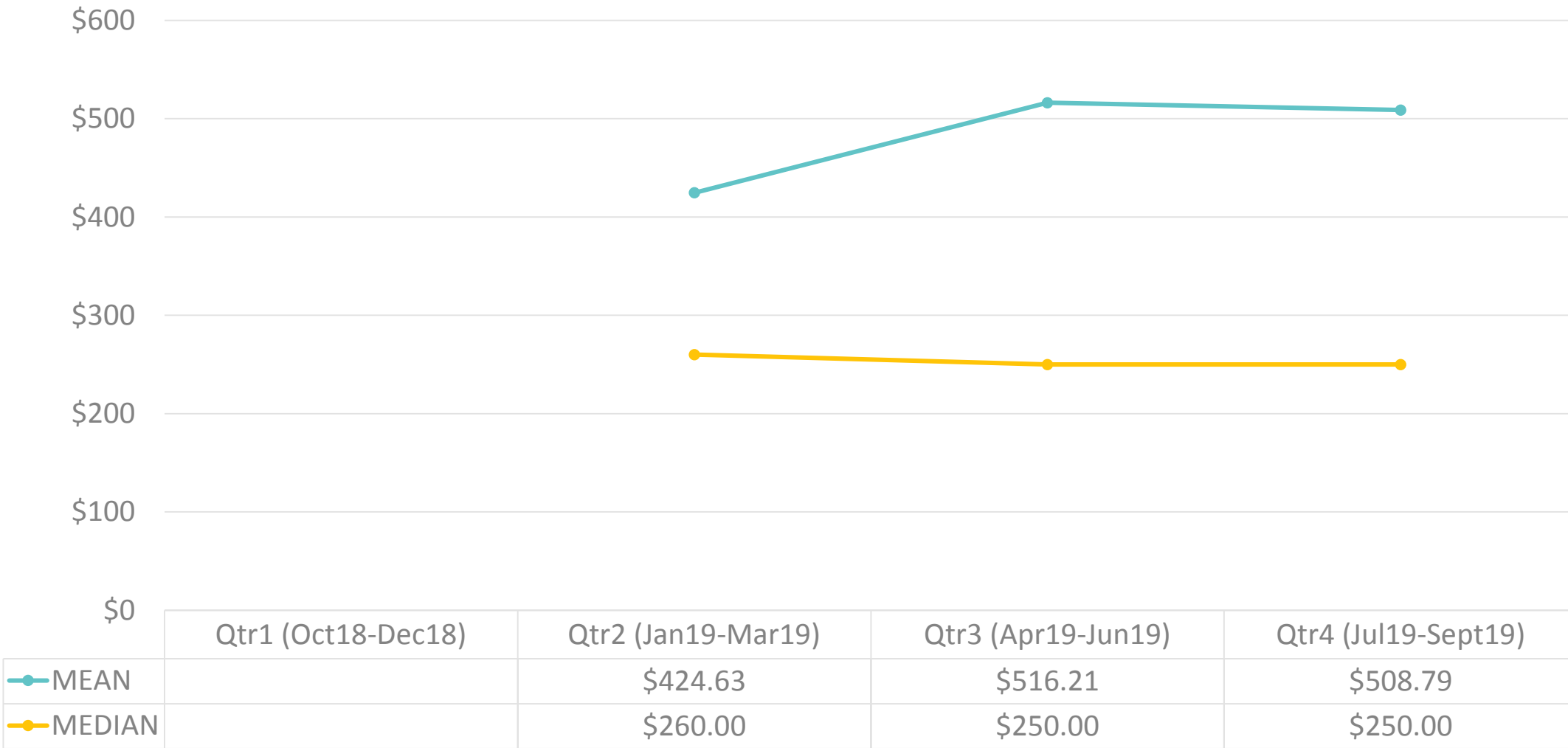
ONISLE – ACCOMMODATIONS TRACKING



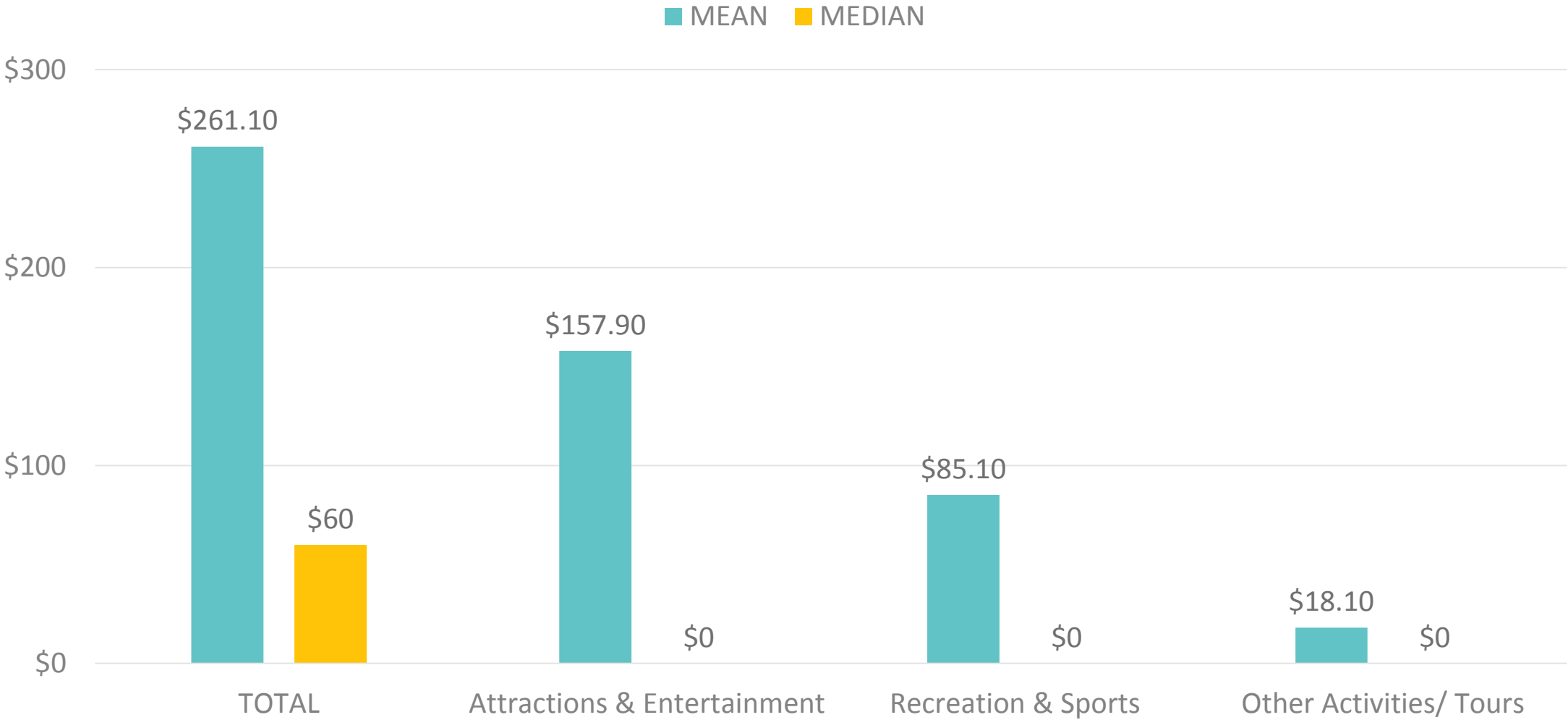
ONISLE – FOOD & BEVERAGE



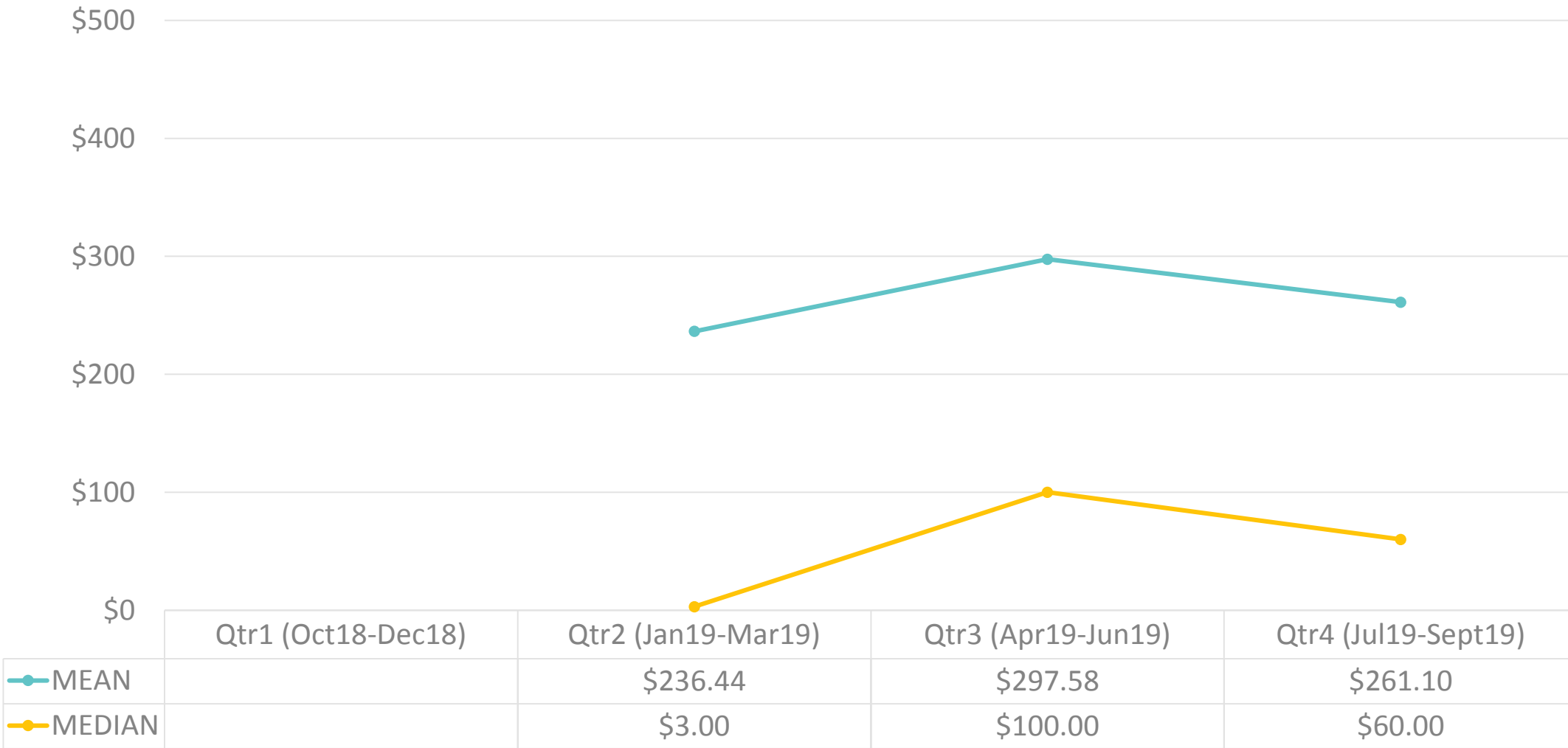
ONISLE – TOTAL FOOD & BEVERAGE TRACKING



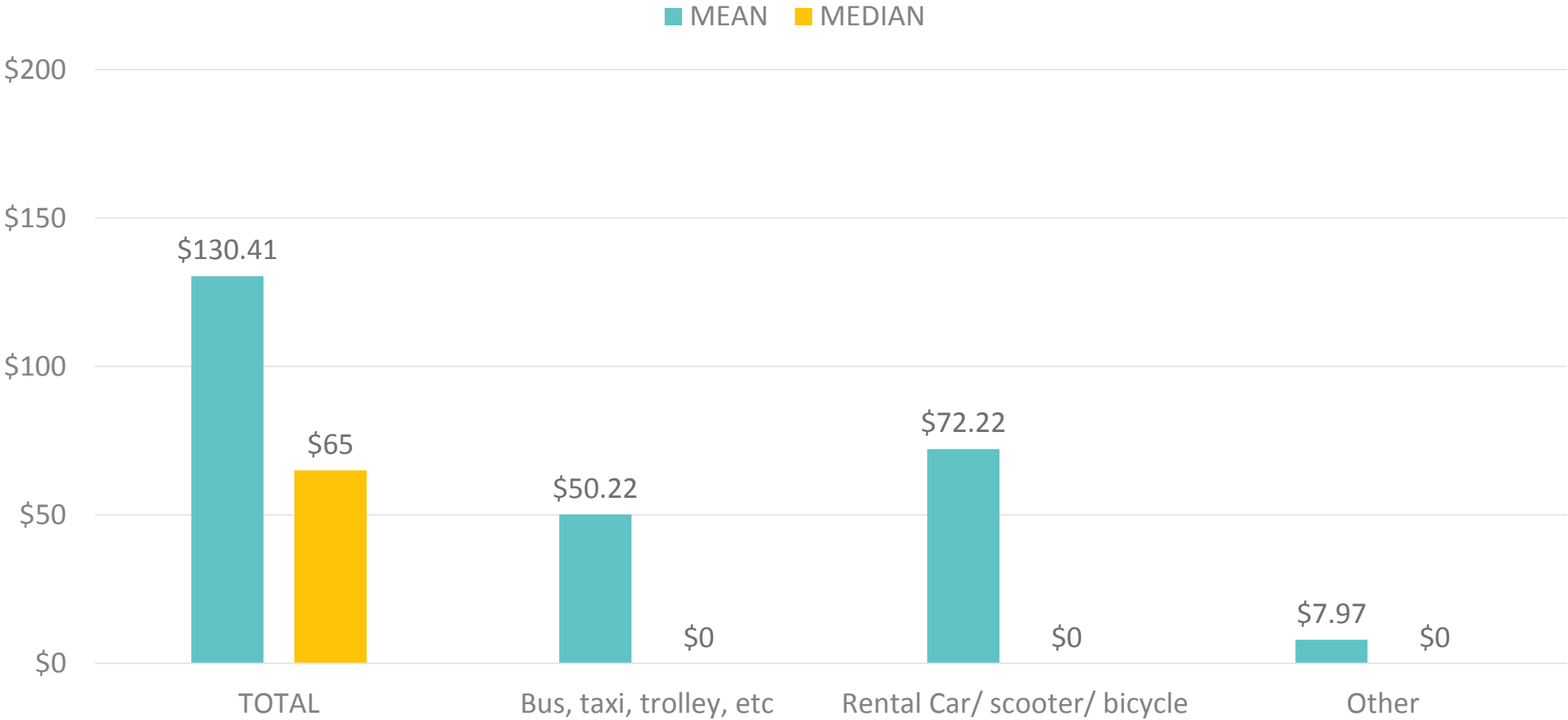
ONISLE – ENTERTAINMENT & RECREATION



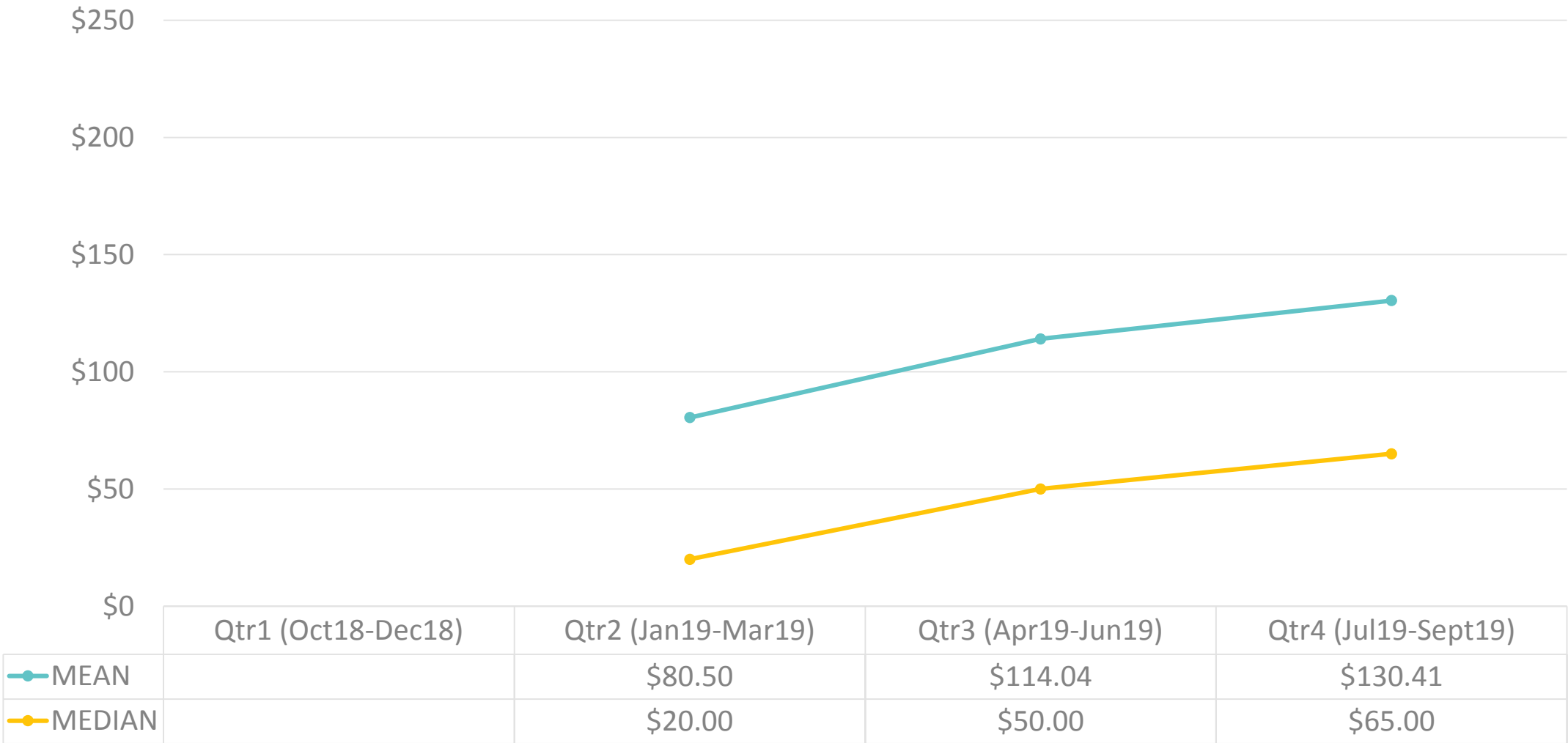
ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING



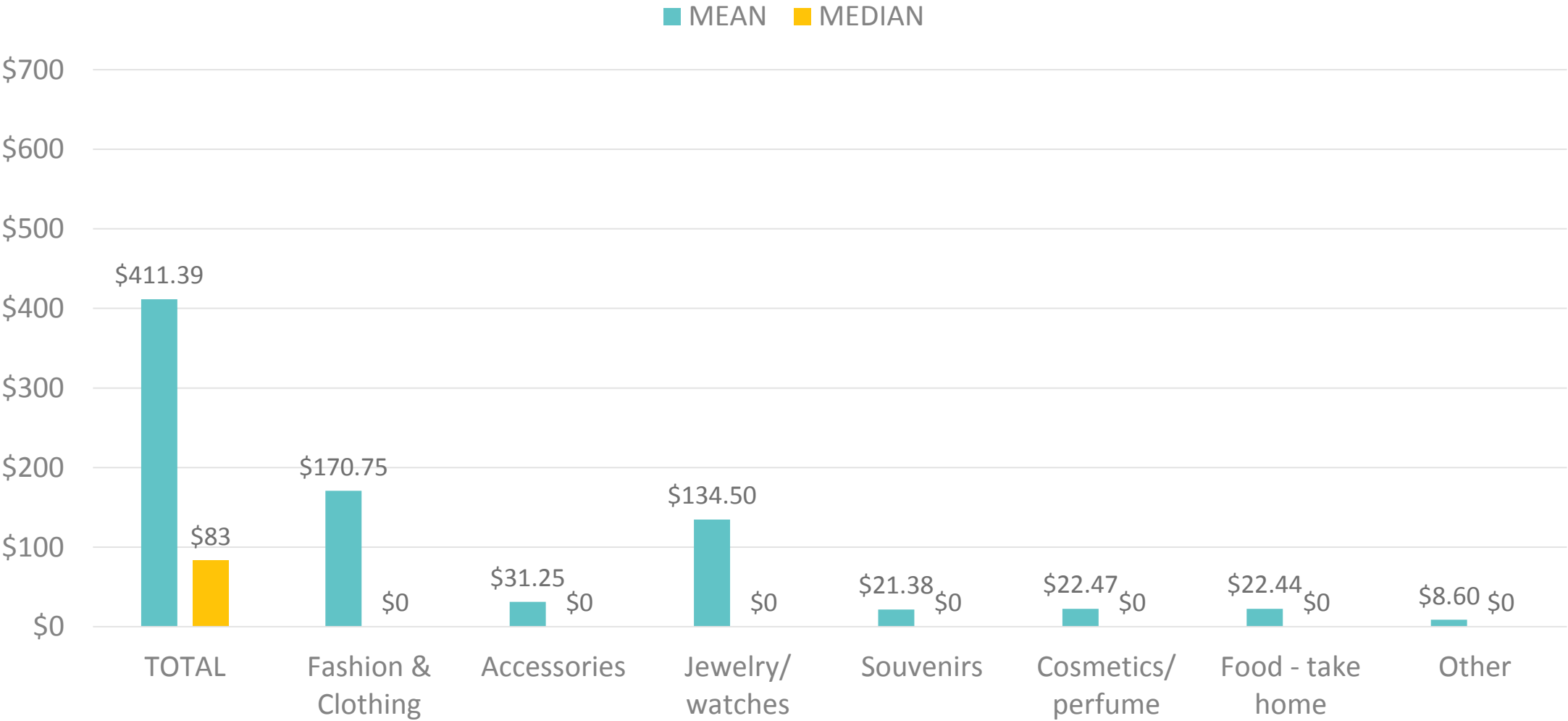
ONISLE – TRANSPORTATION



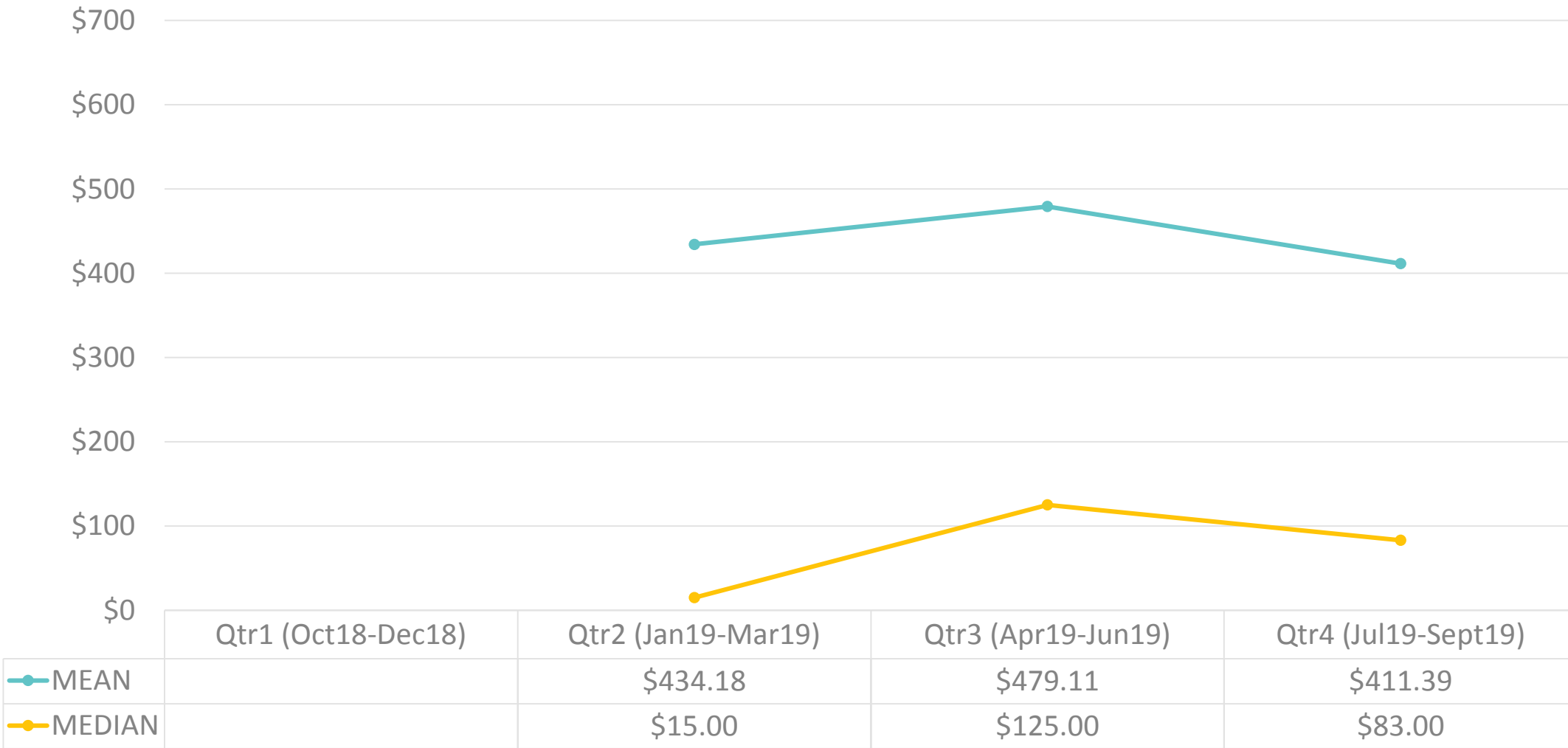
ONISLE – TOTAL TRANSPORTATION TRACKING



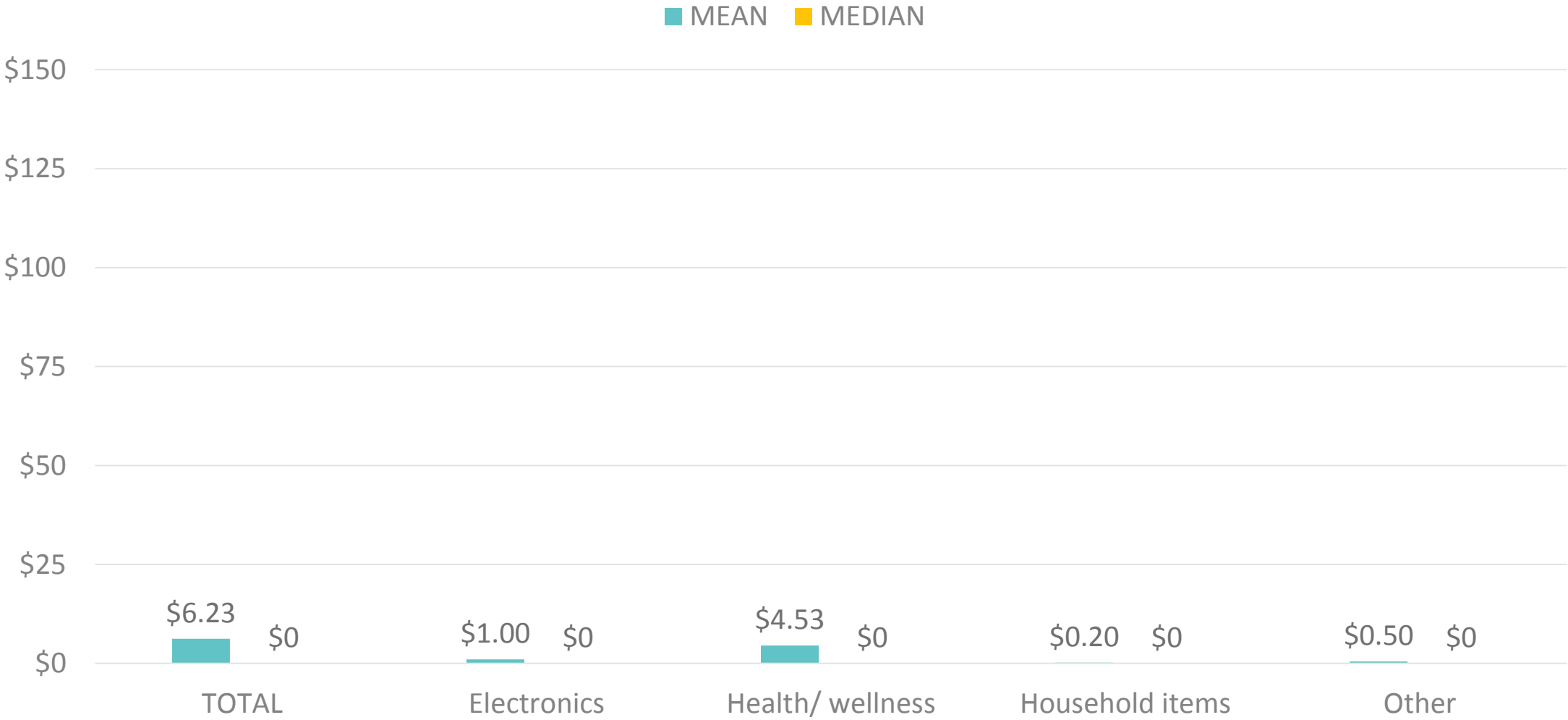
ONISLE – SHOPPING



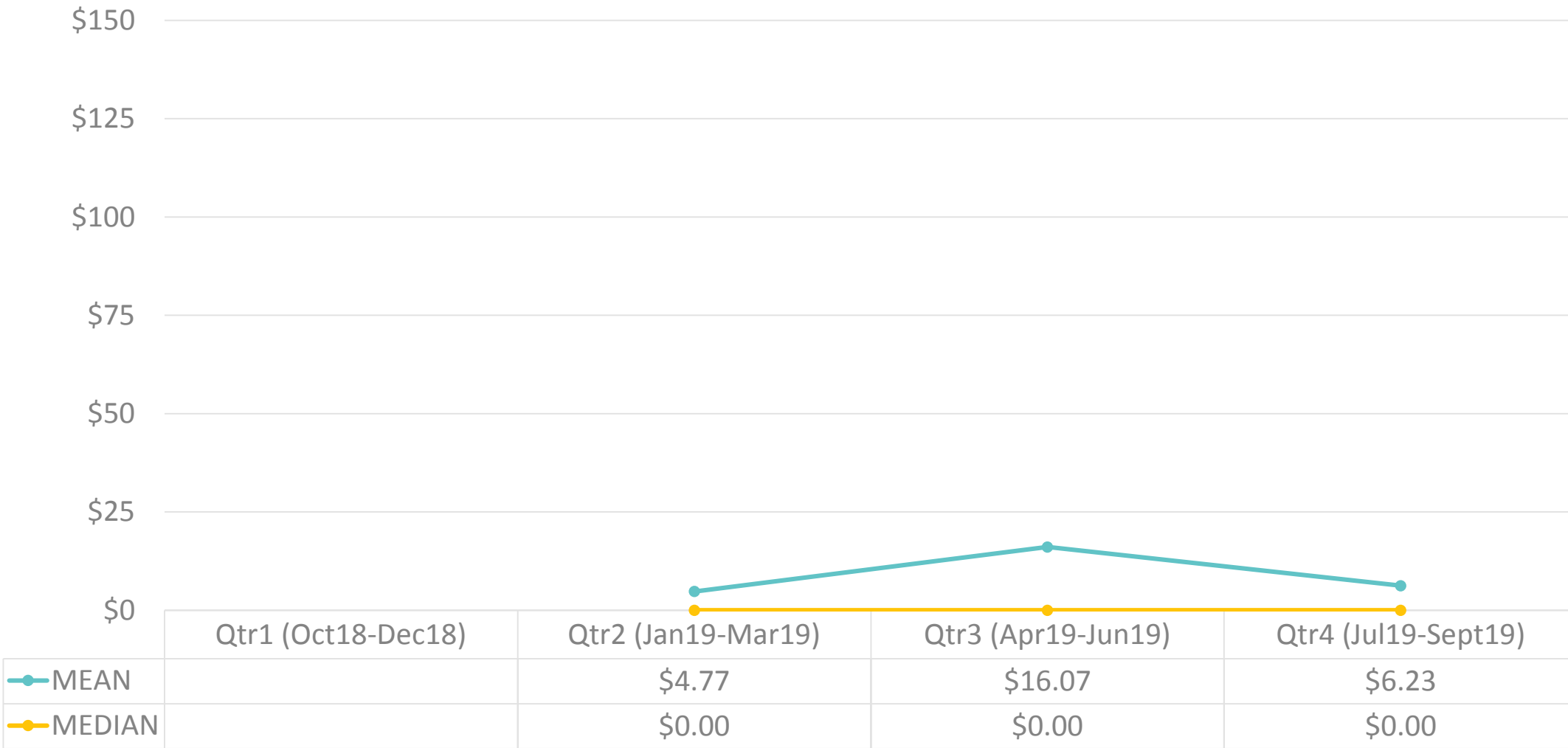
ONISLE – TOTAL SHOPPING TRACKING



ONISLE – MISCELLANEOUS



ONISLE – MISCELLANEOUS TRACKING



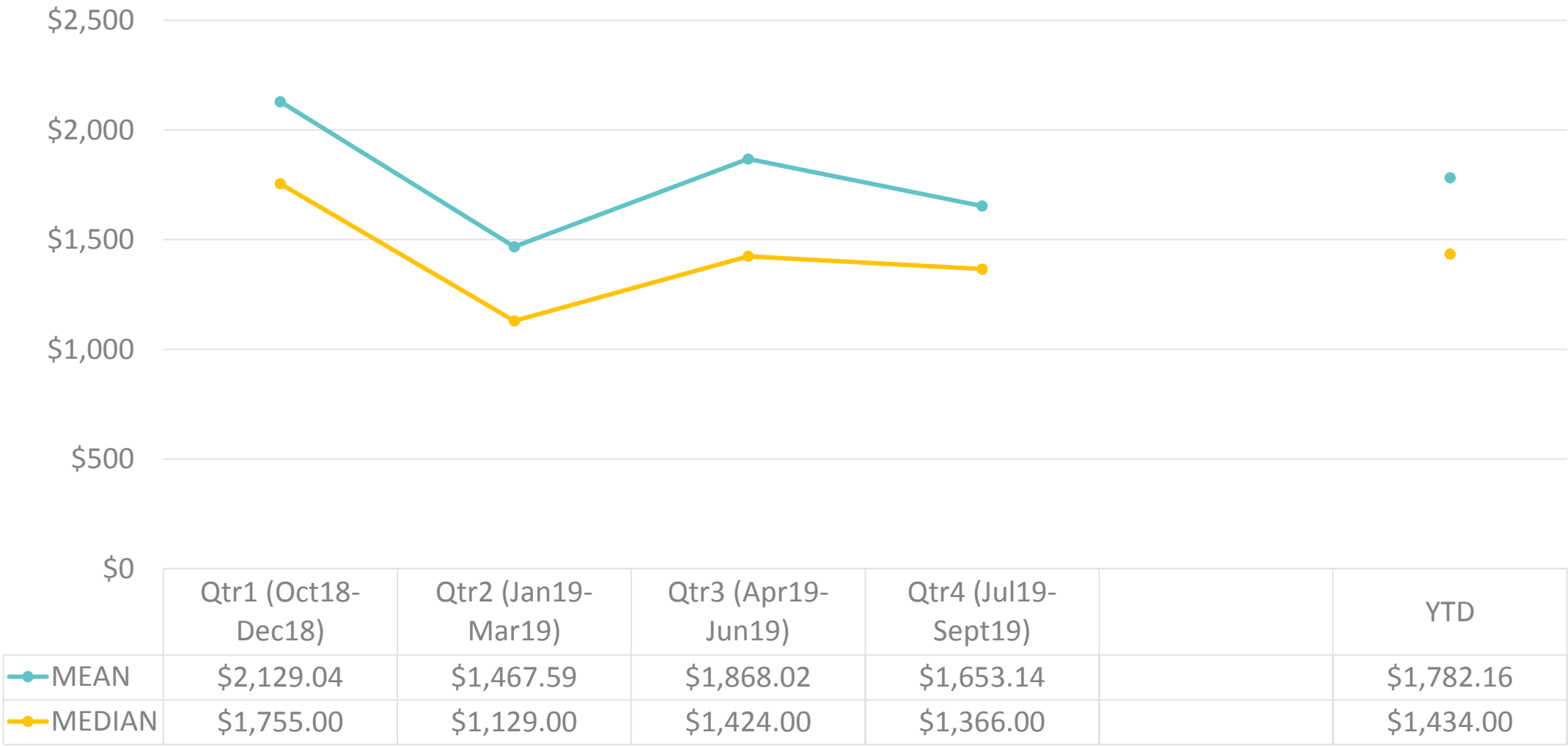
[A]



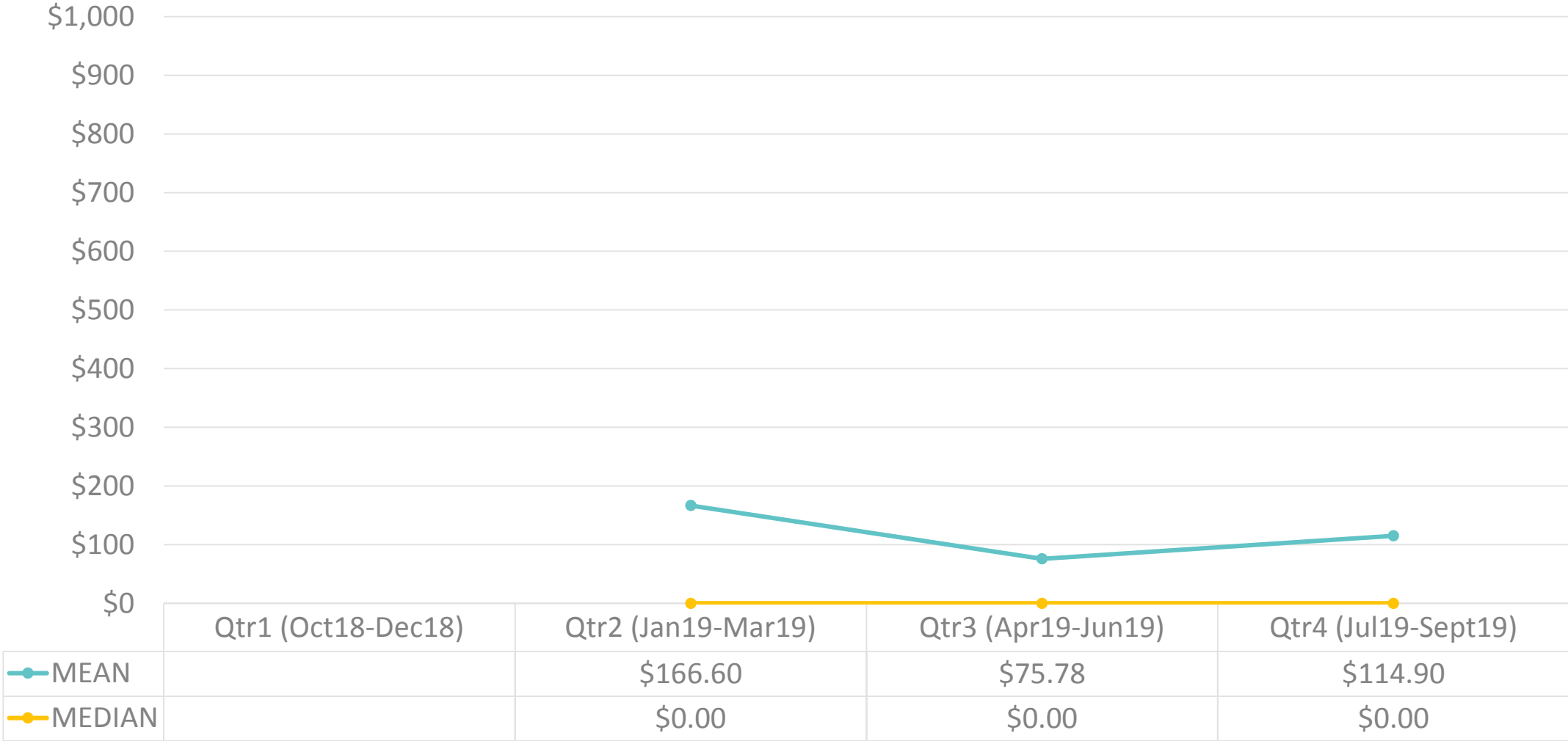
TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

- \$1,653.14 = Mean average per person
- \$1,366.00 = Median amount spent per person

TOTAL EXPENDITURES PER PERSON TRACKING



GUAM AIRPORT EXPENDITURE TRACKING



[A]

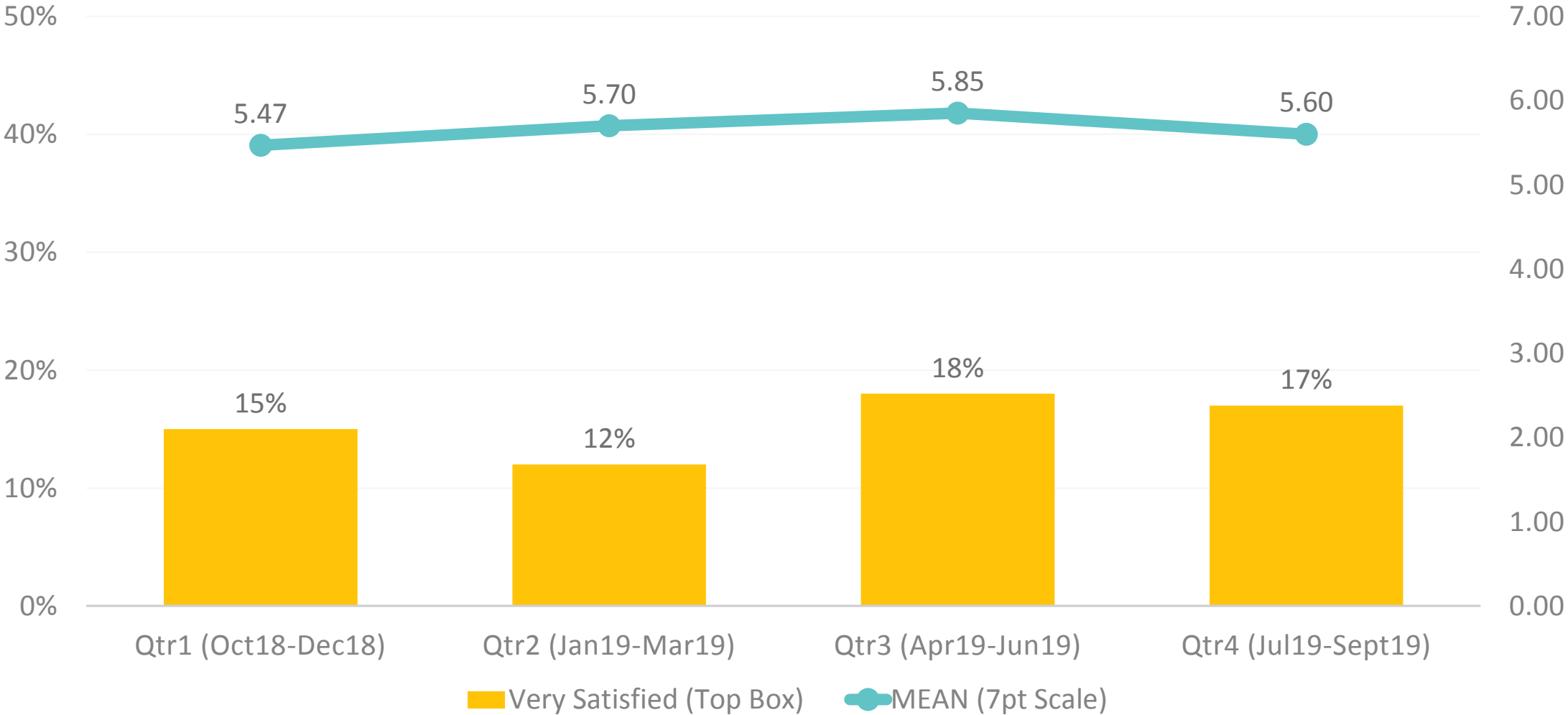




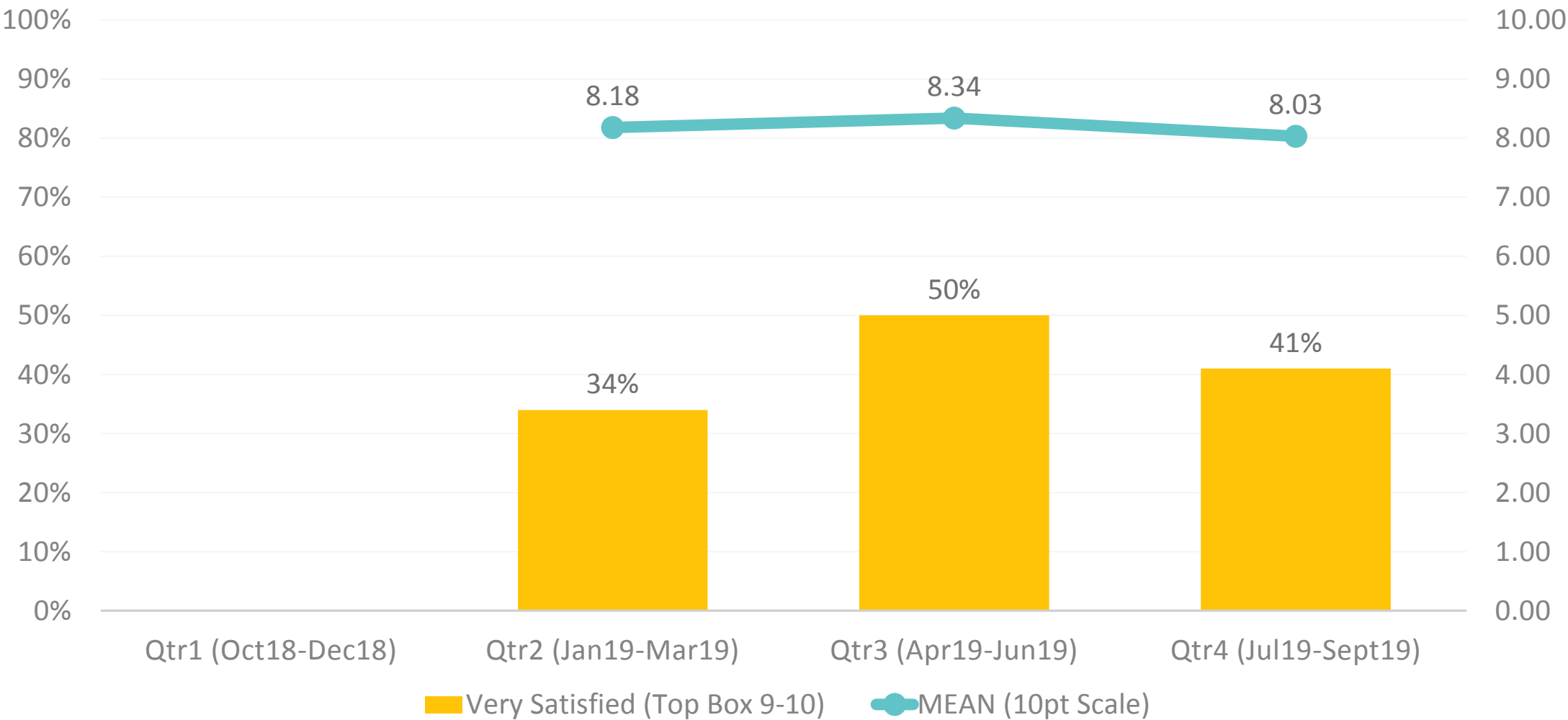
SECTION 4

VISITOR SATISFACTION

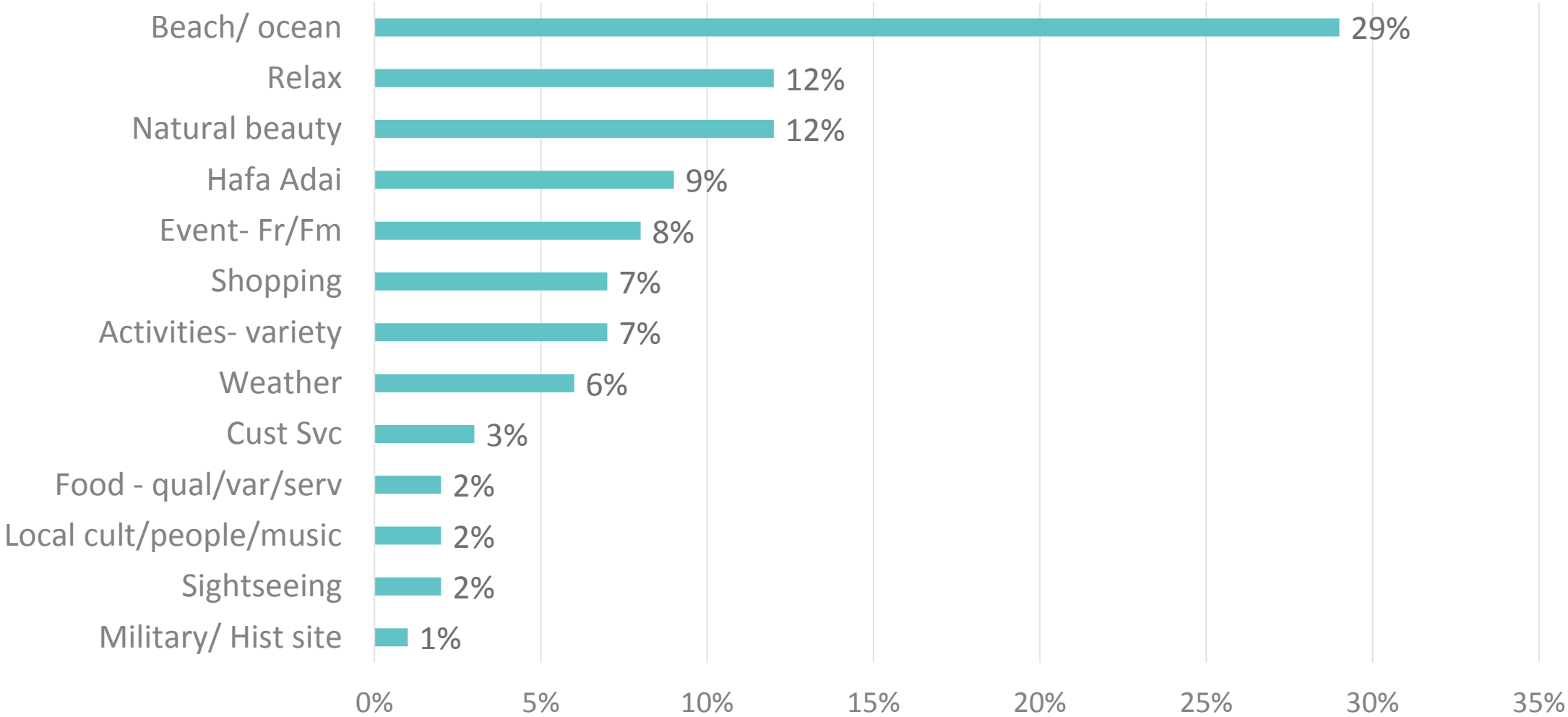
OVERALL SATISFACTION – 7PT SCALE



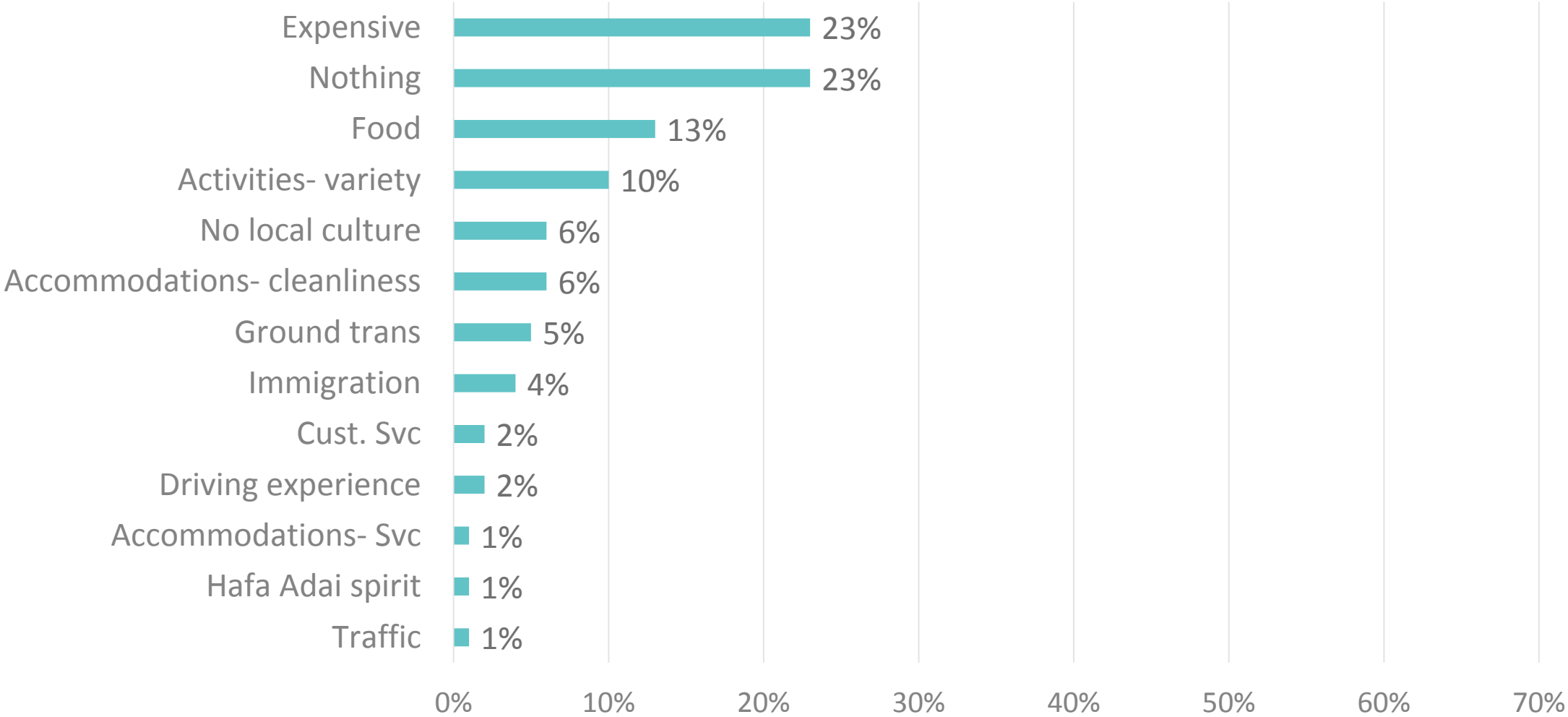
OVERALL SATISFACTION – 10PT SCALE



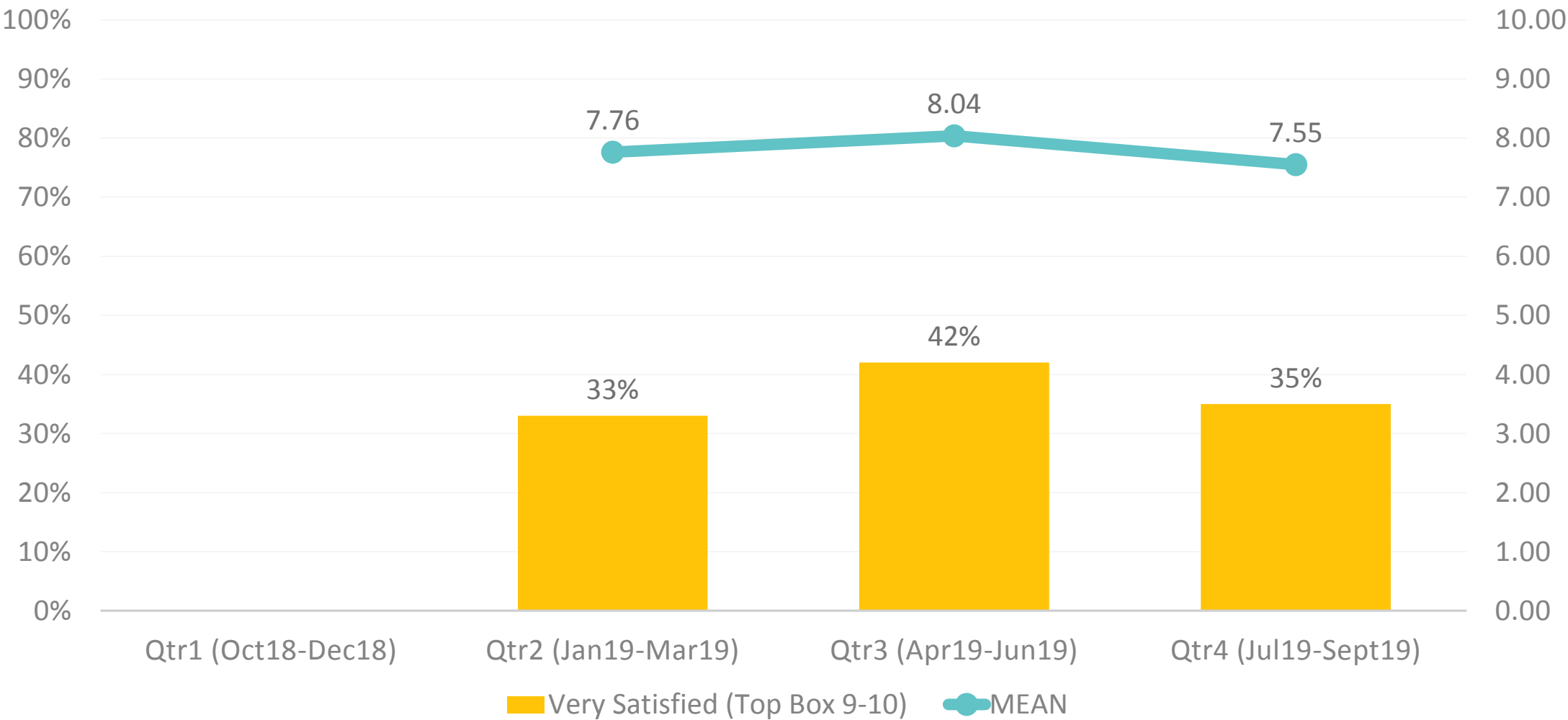
SWOT – POSITIVE ASPECT OF TRIP



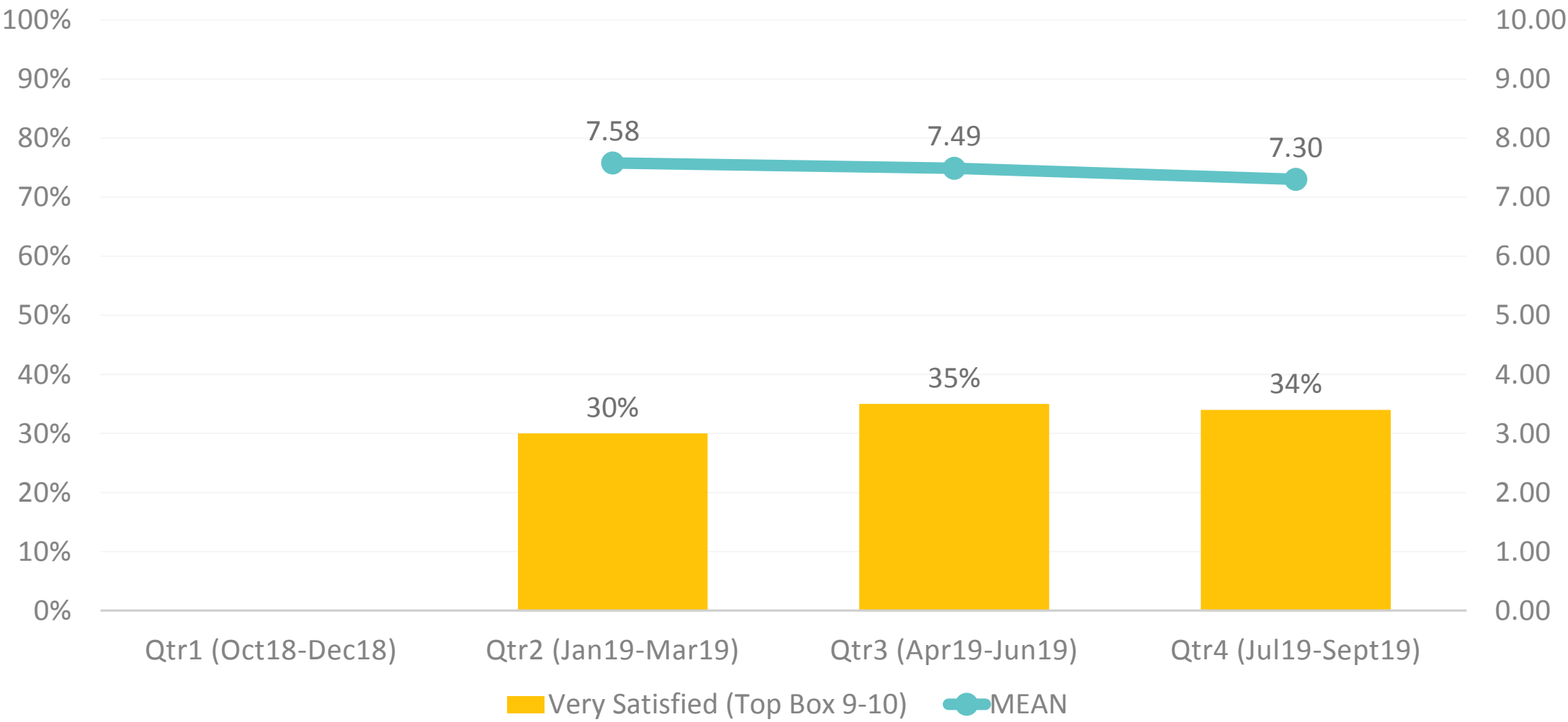
SWOT – NEGATIVE ASPECT OF TRIP



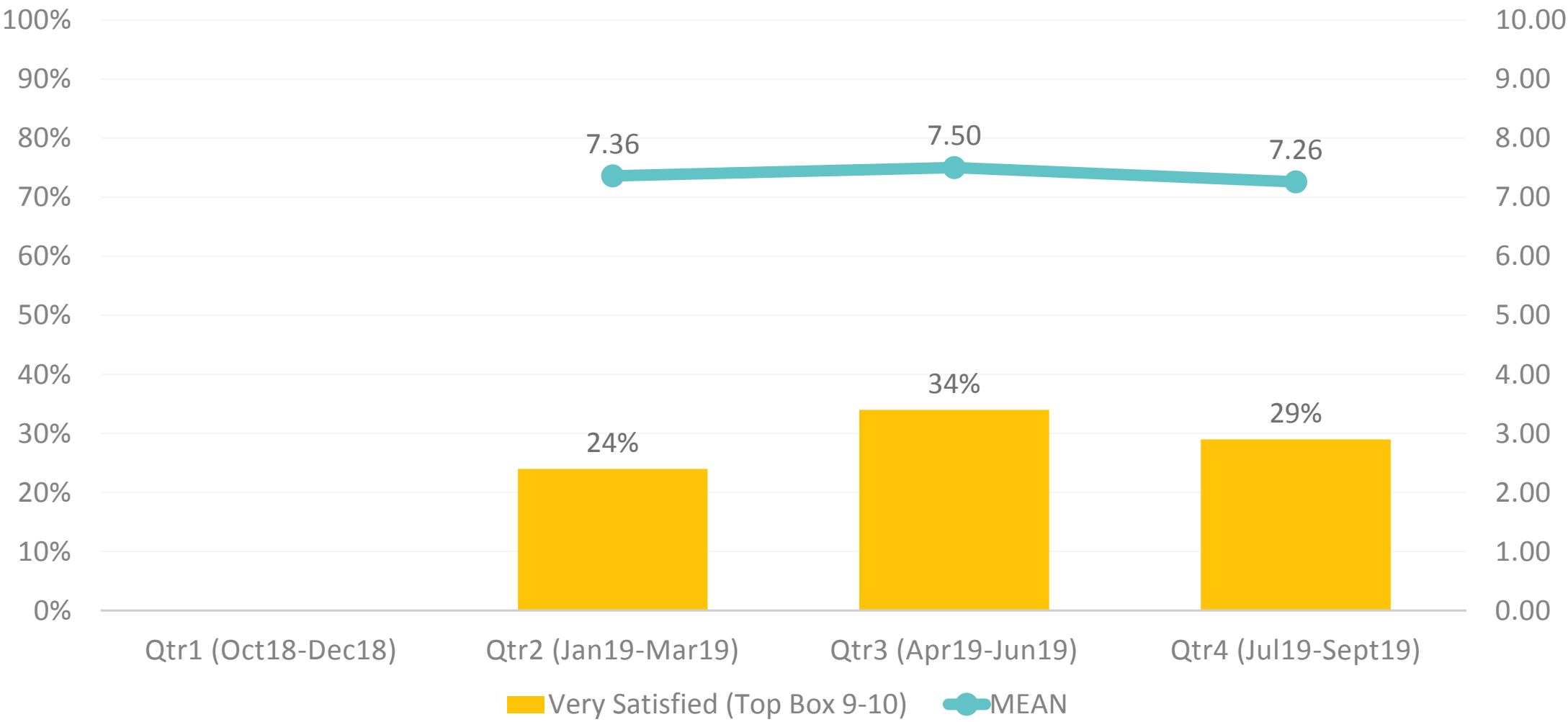
SATISFACTION – ENTERTAINMENT



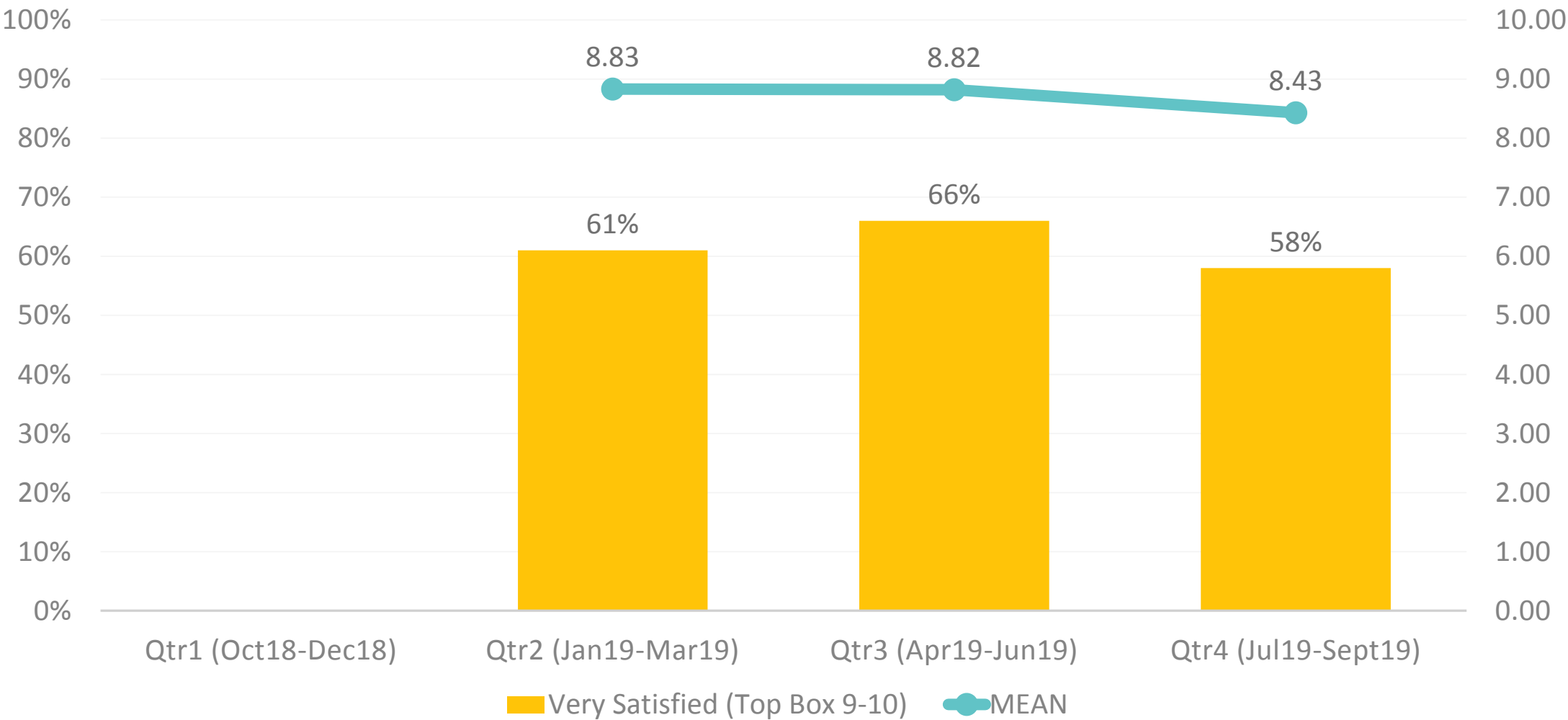
SATISFACTION – SHOPPING



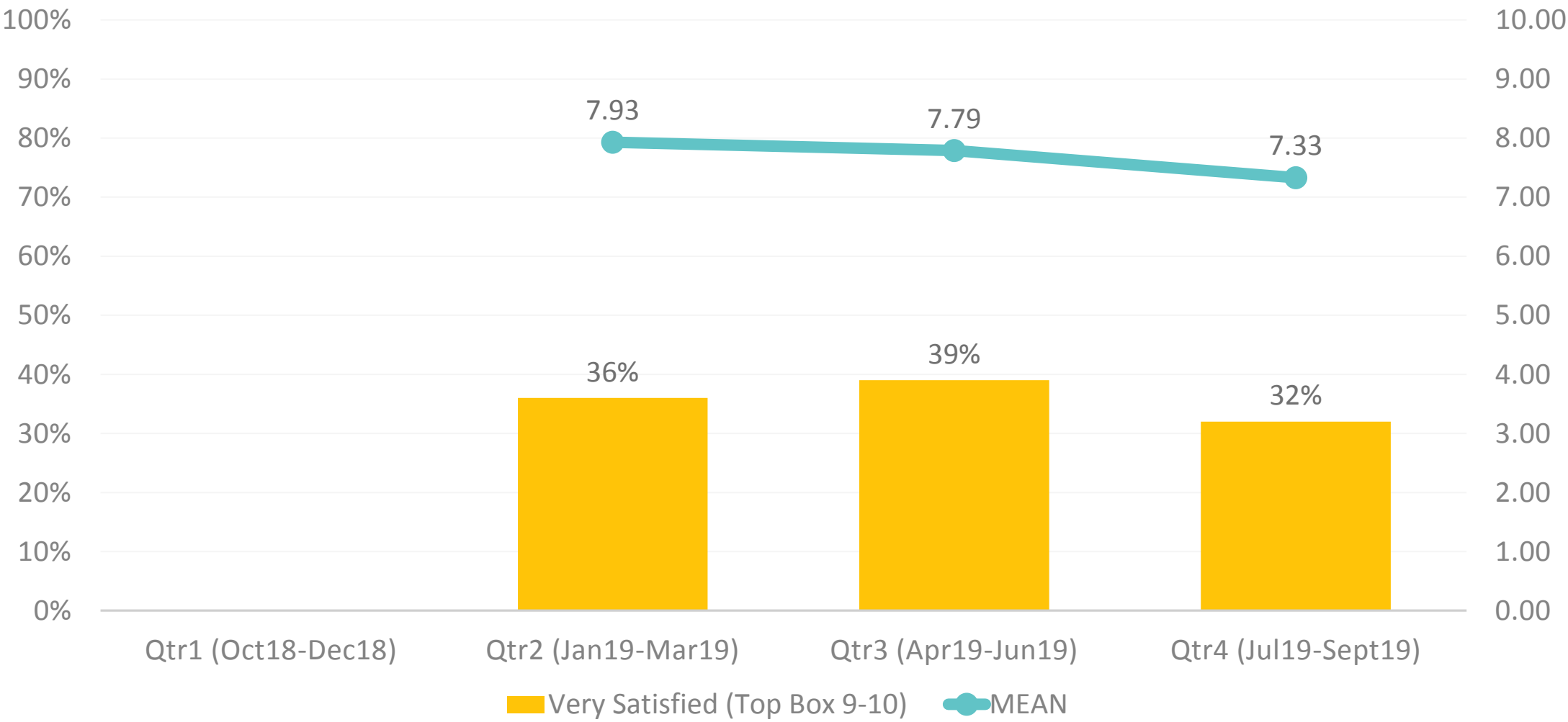
SATISFACTION – DINING



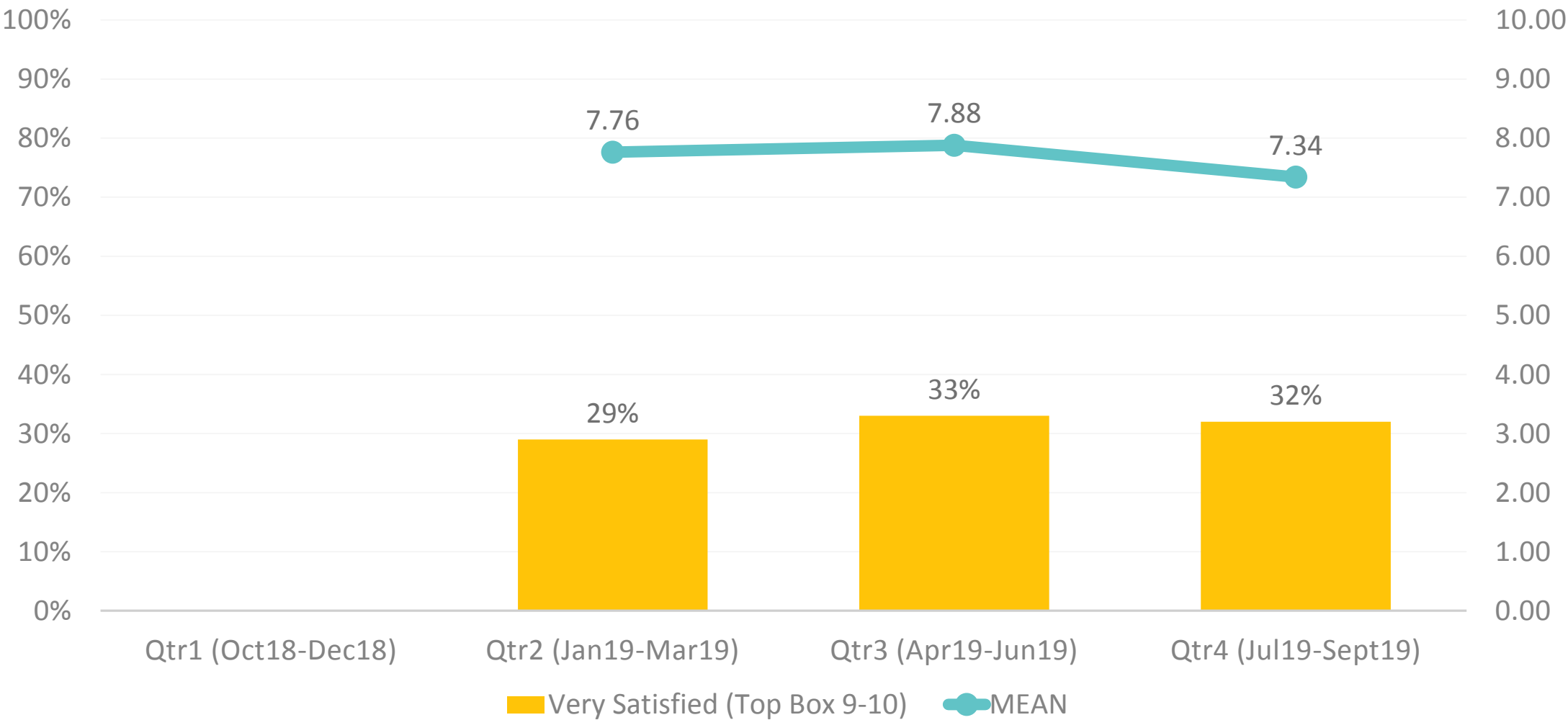
SATISFACTION – BEACHES



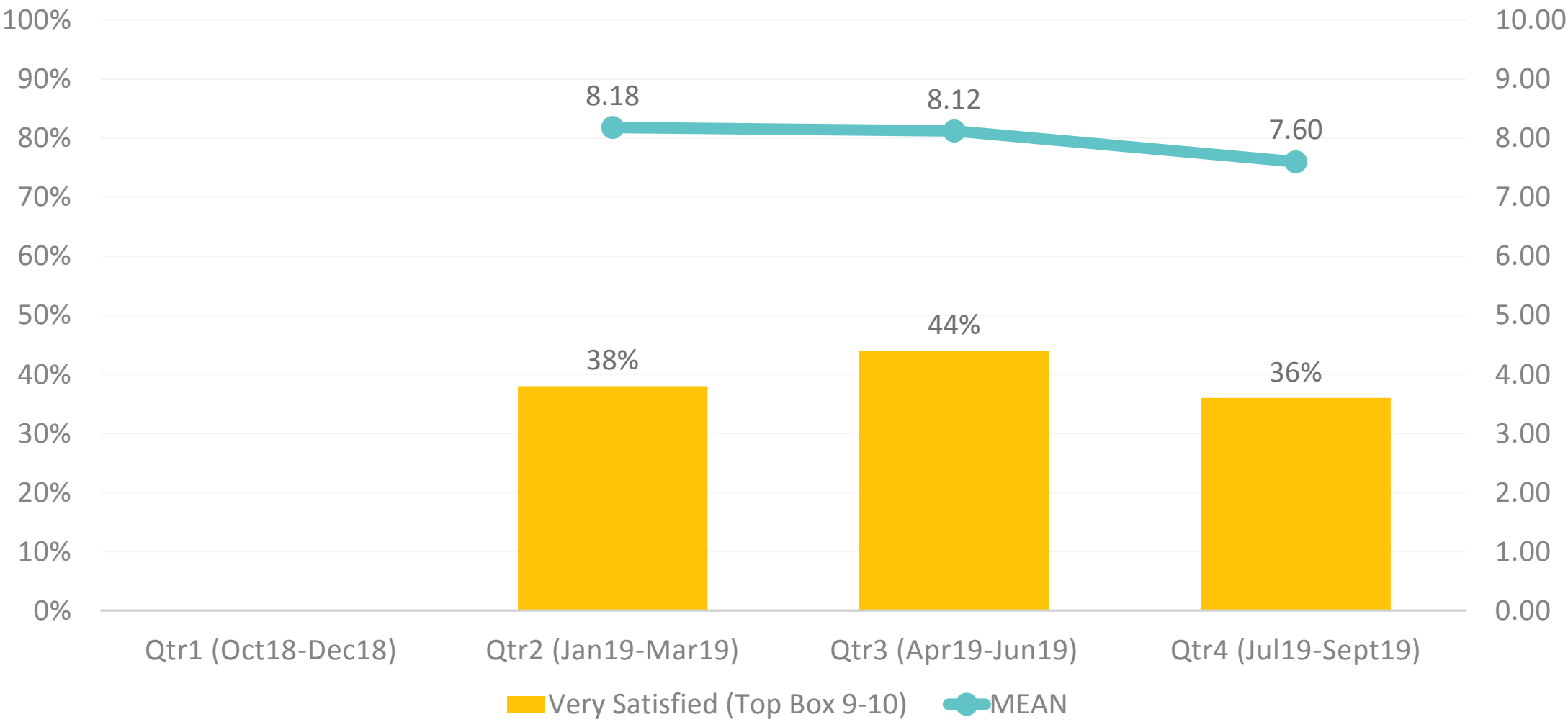
SATISFACTION – PARKS



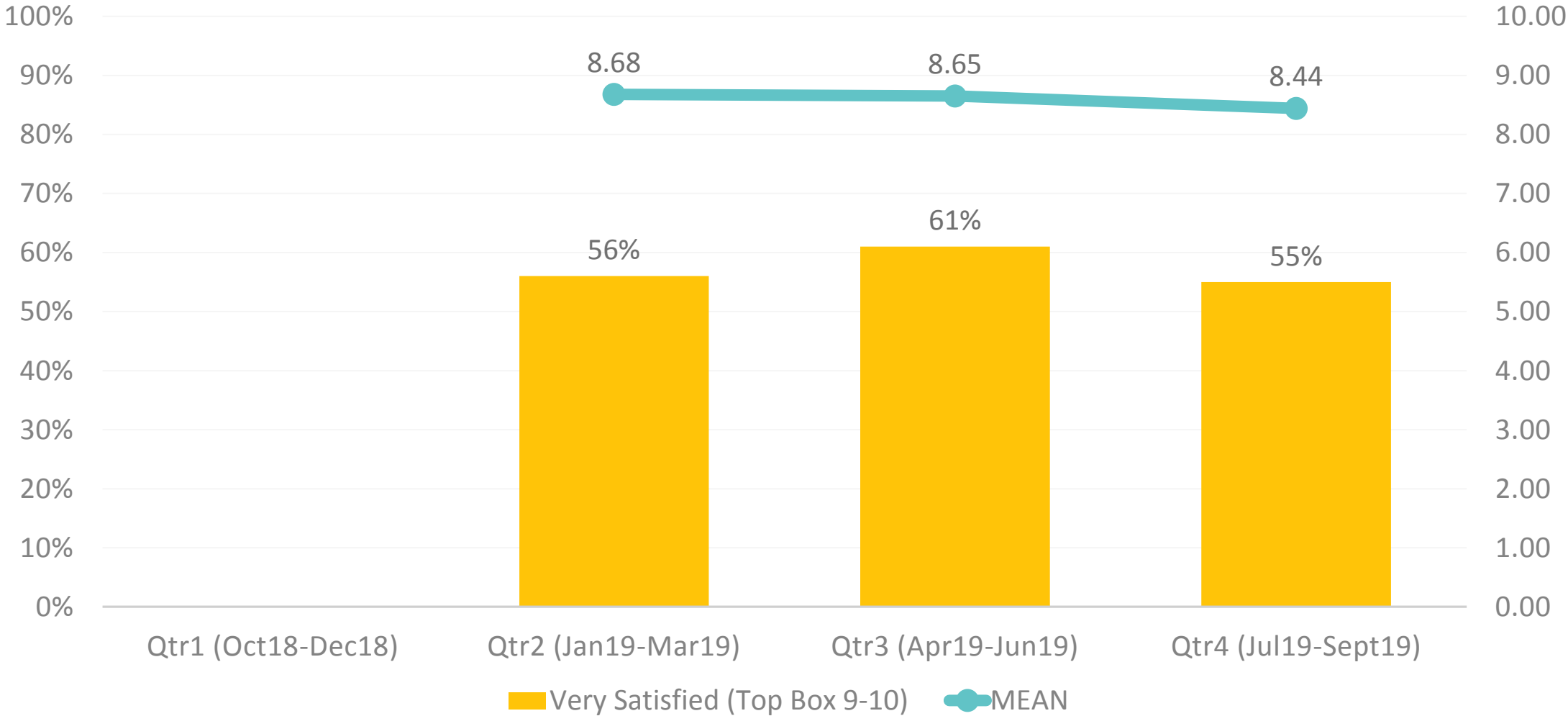
SATISFACTION – ROADS



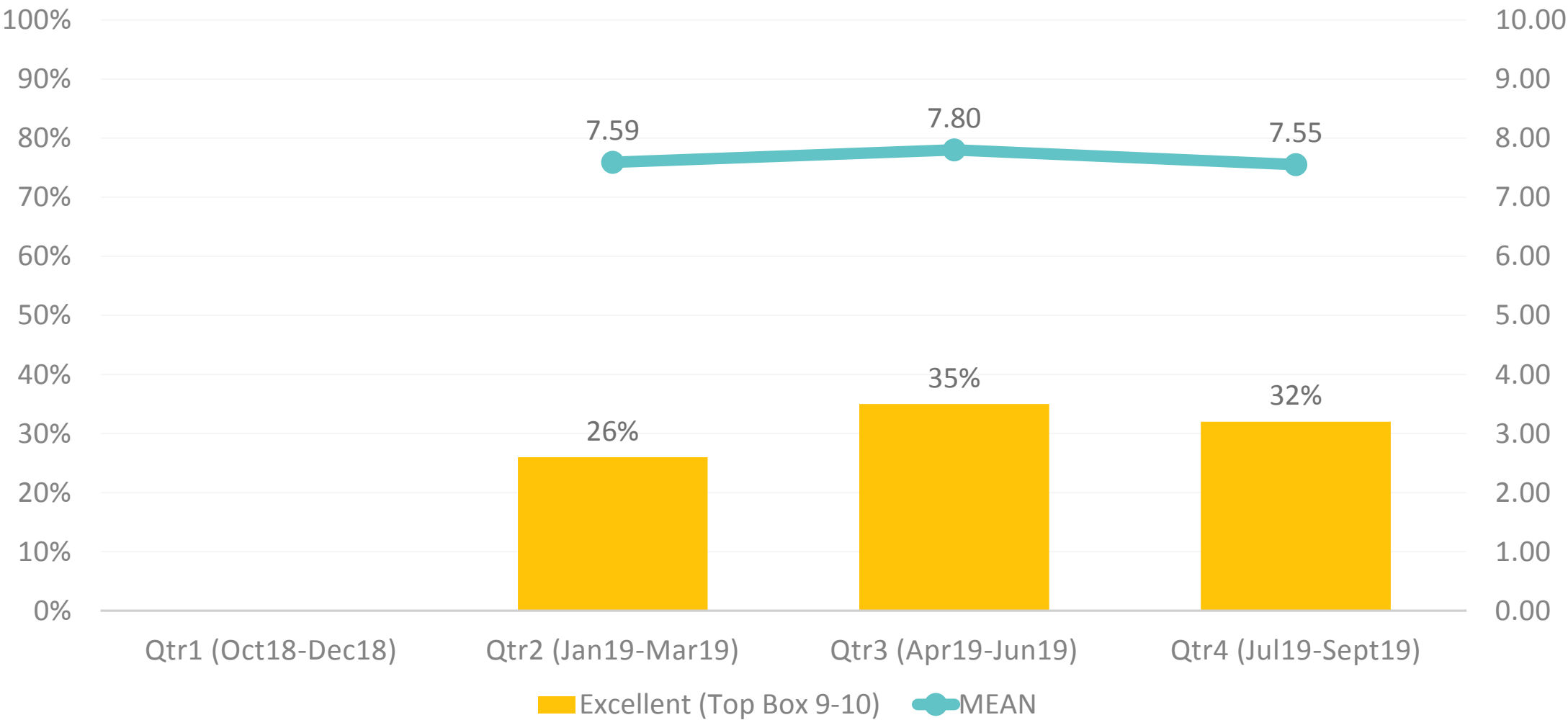
SATISFACTION – SIGHTSEEING AREAS



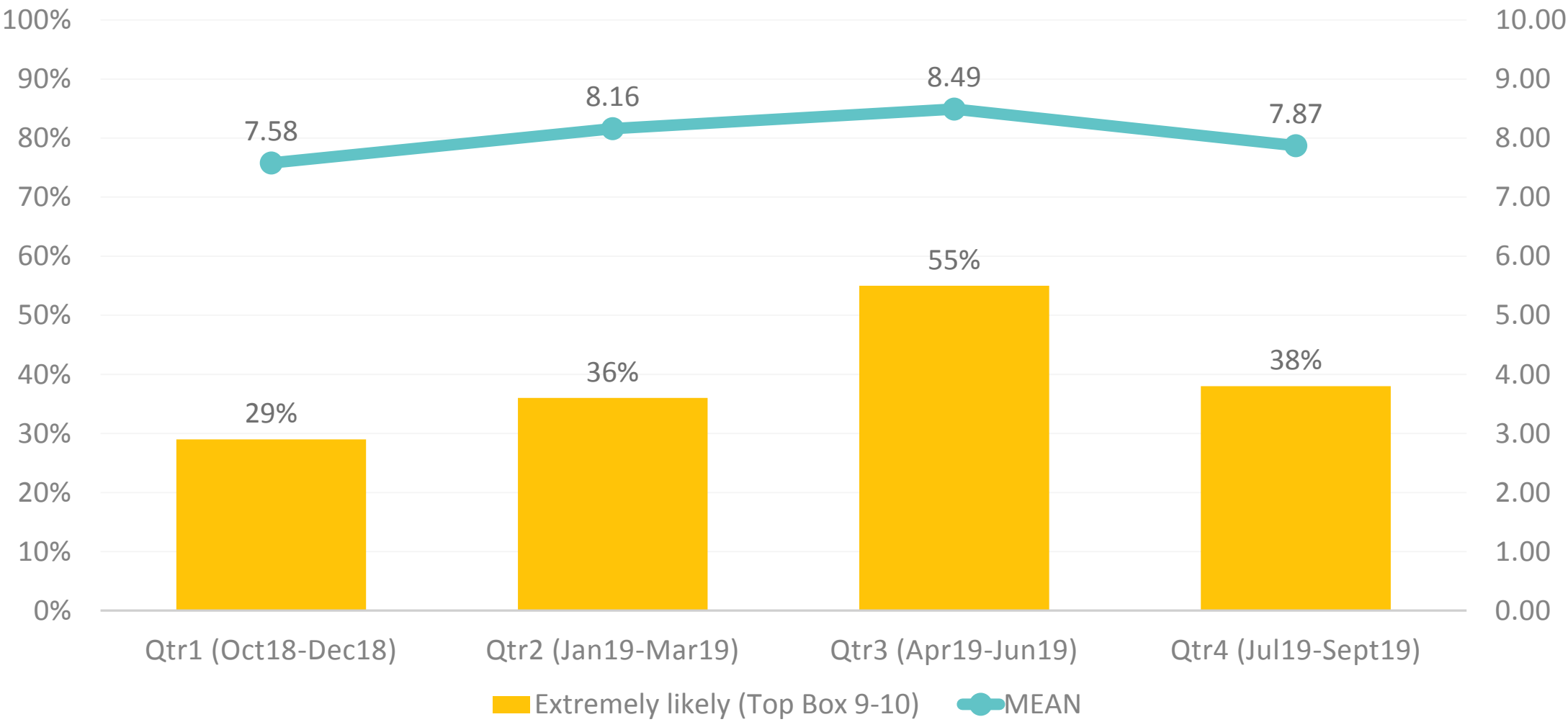
SATISFACTION – SAFETY & SECURITY



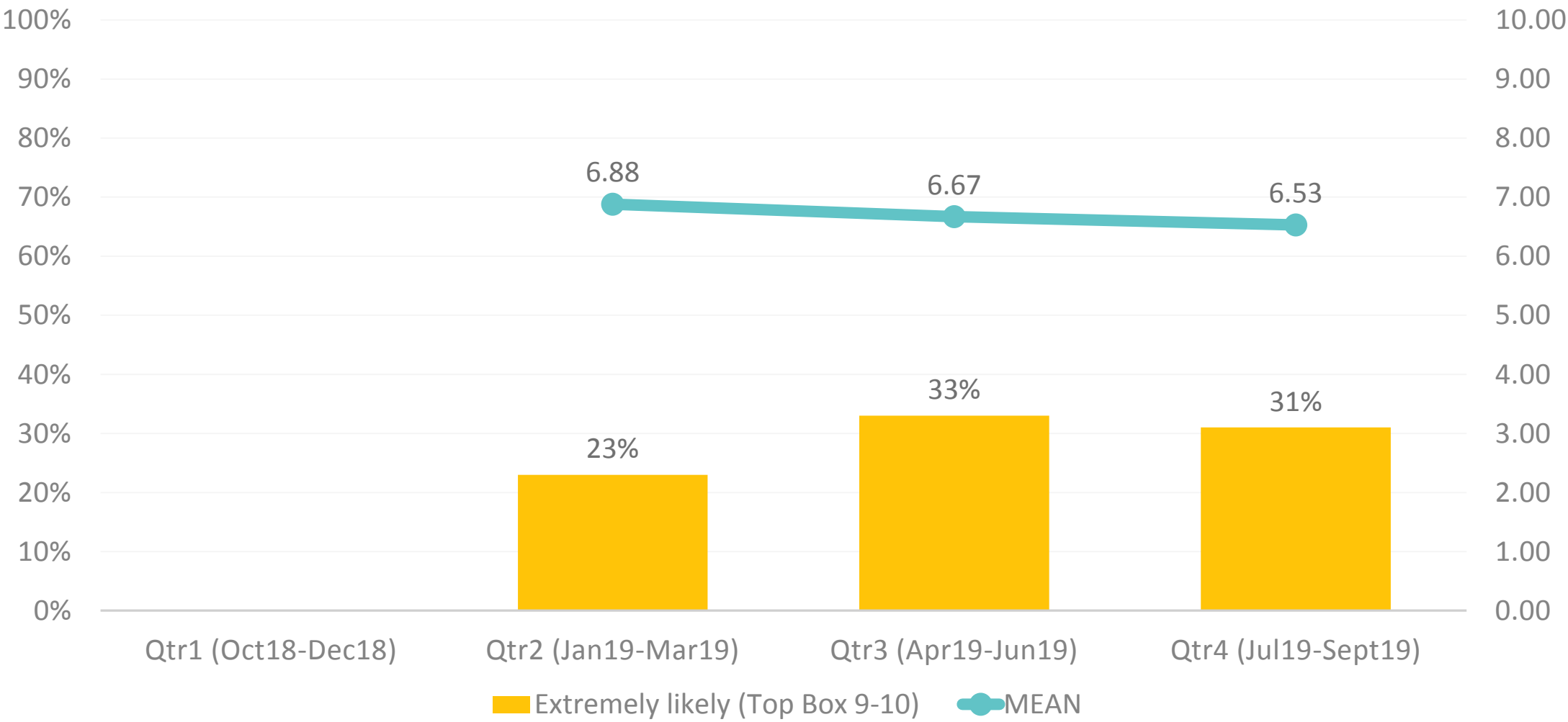
SATISFACTION – ACCOMMODATIONS



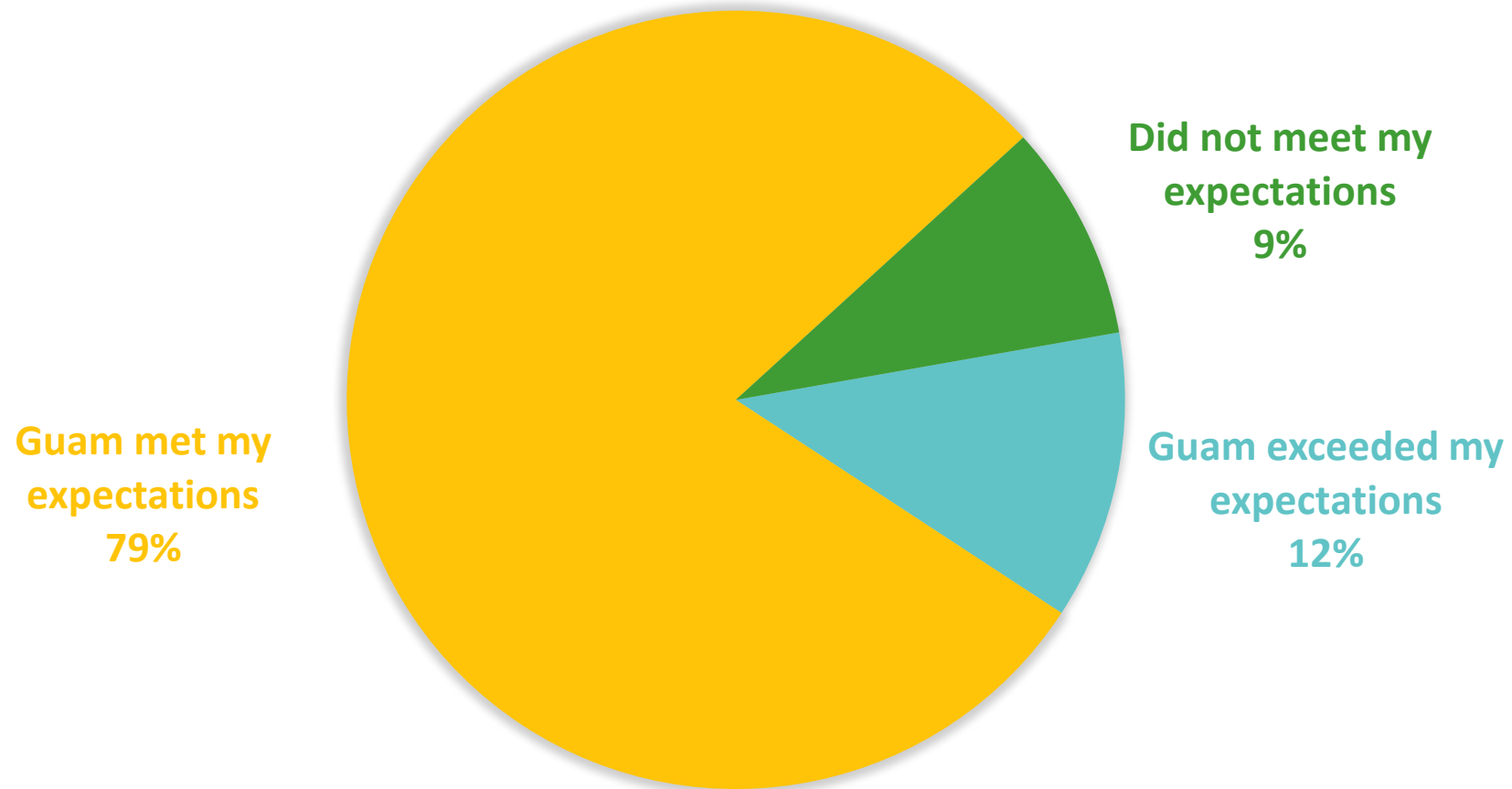
BRAND ADVOCACY



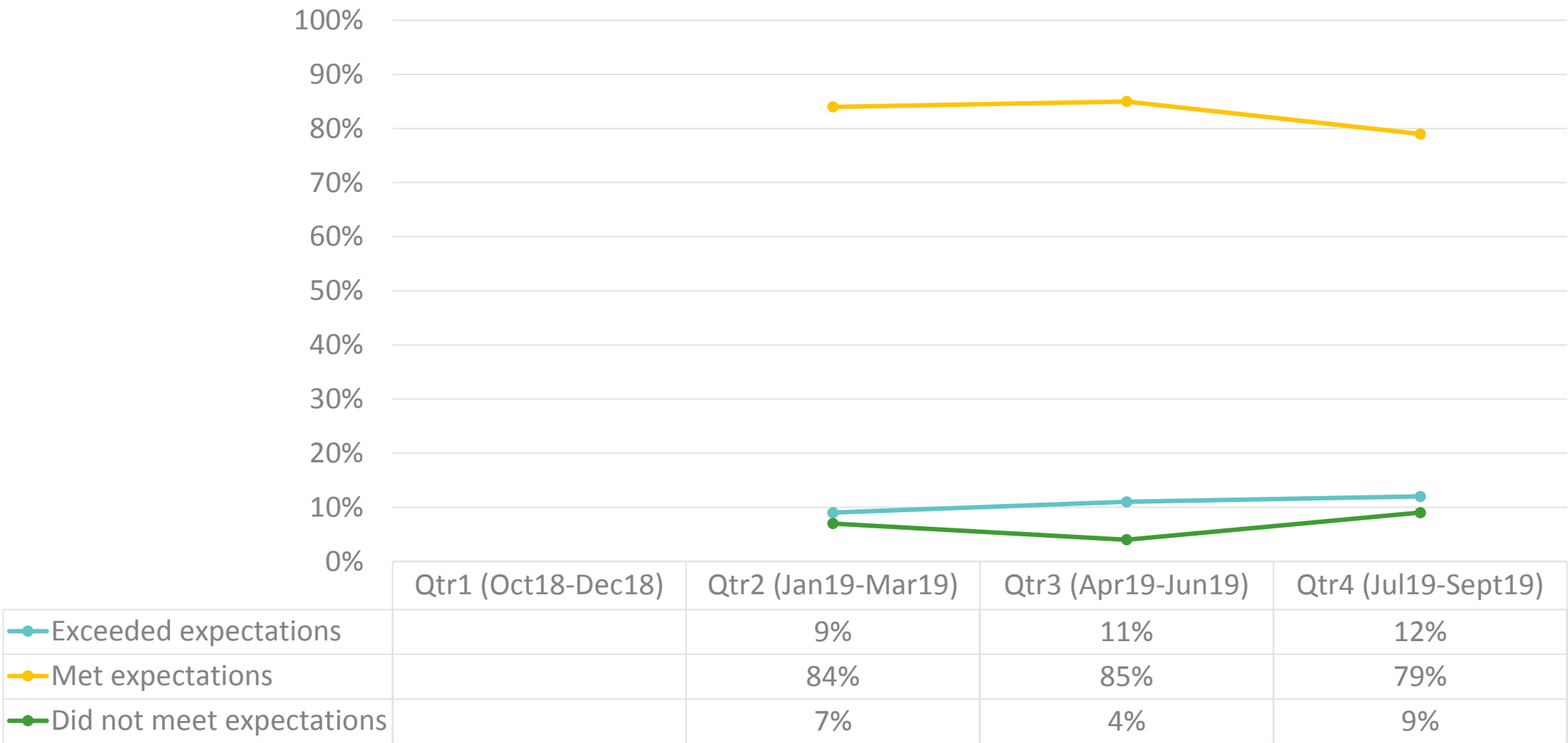
BRAND LOYALTY

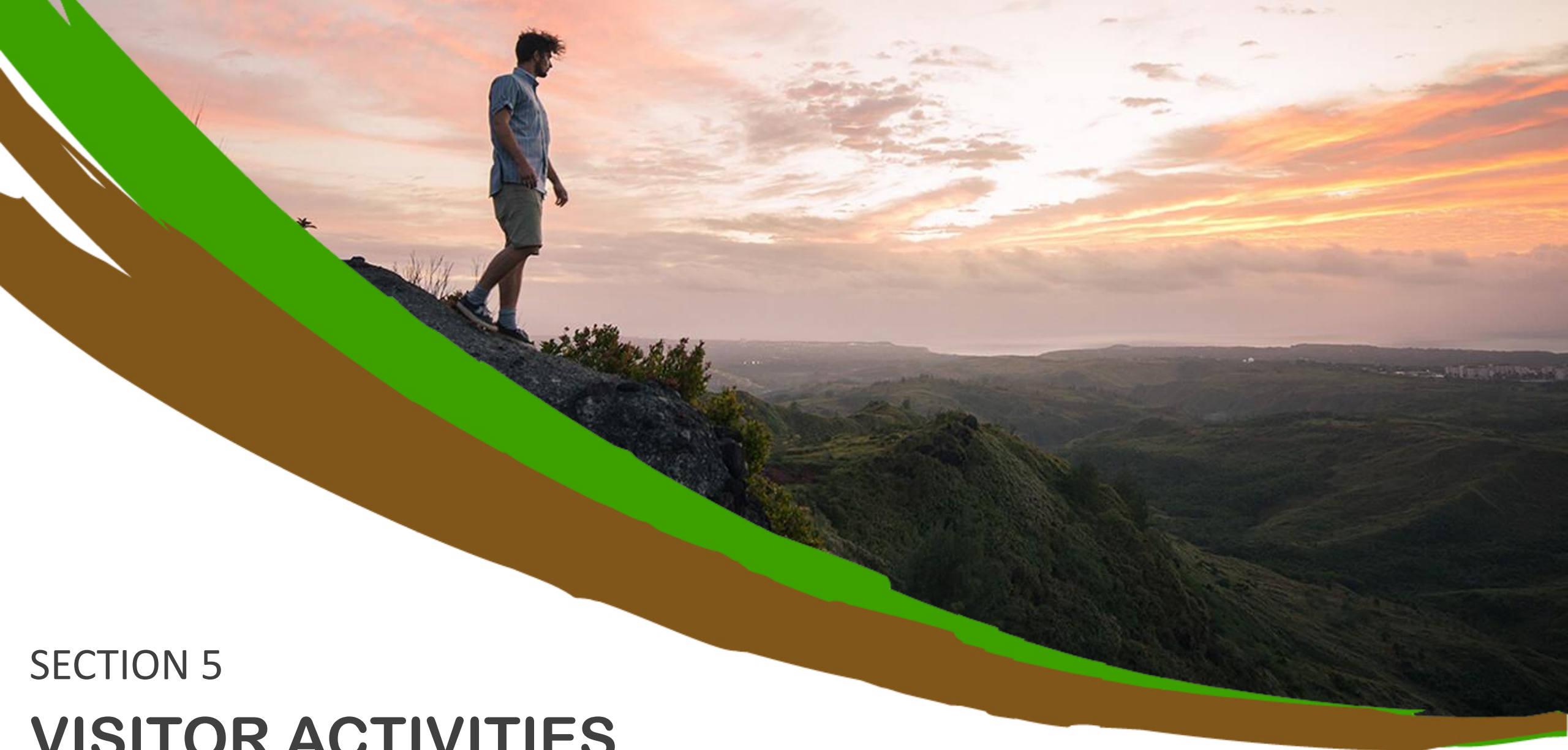


TRIP EXPECTATIONS



TRIP EXPECTATIONS – TRACKING



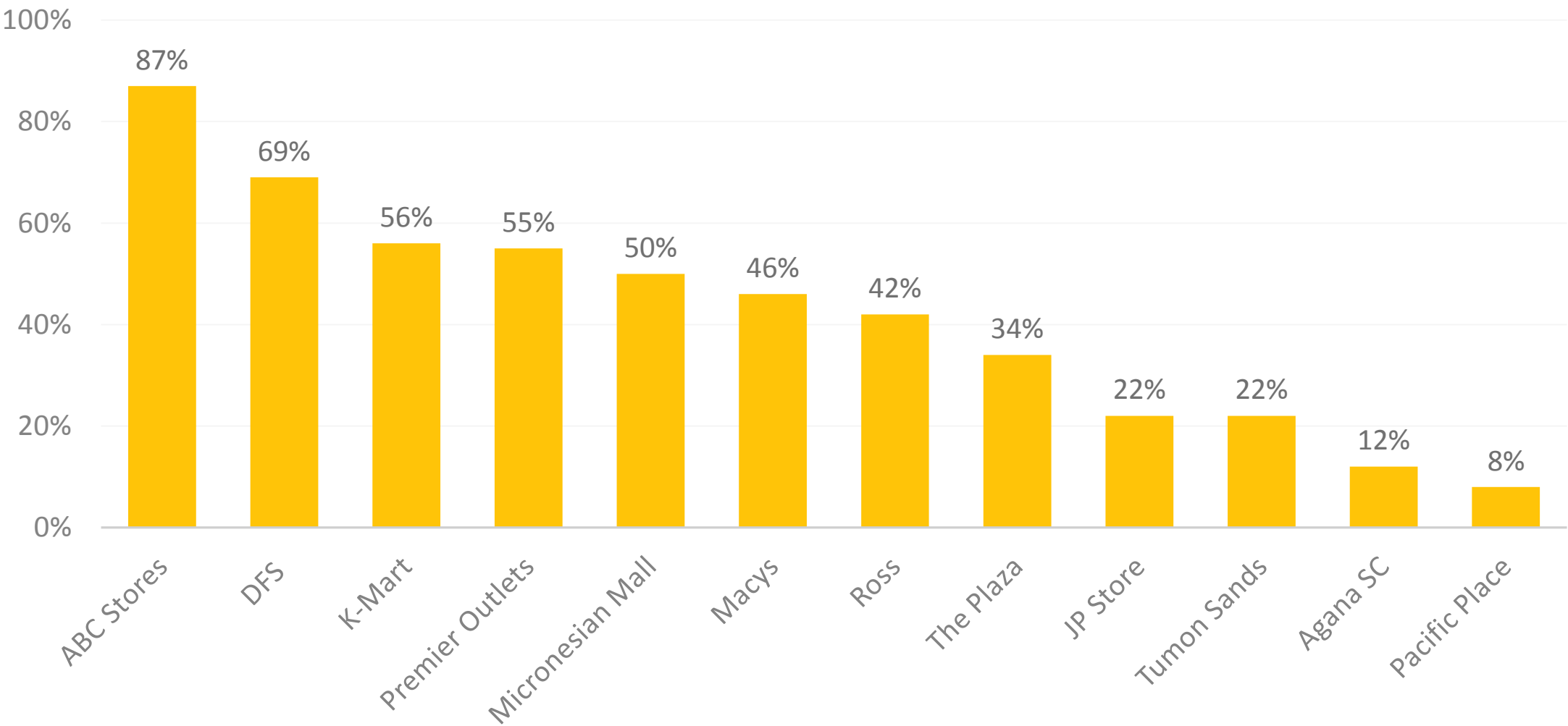


SECTION 5

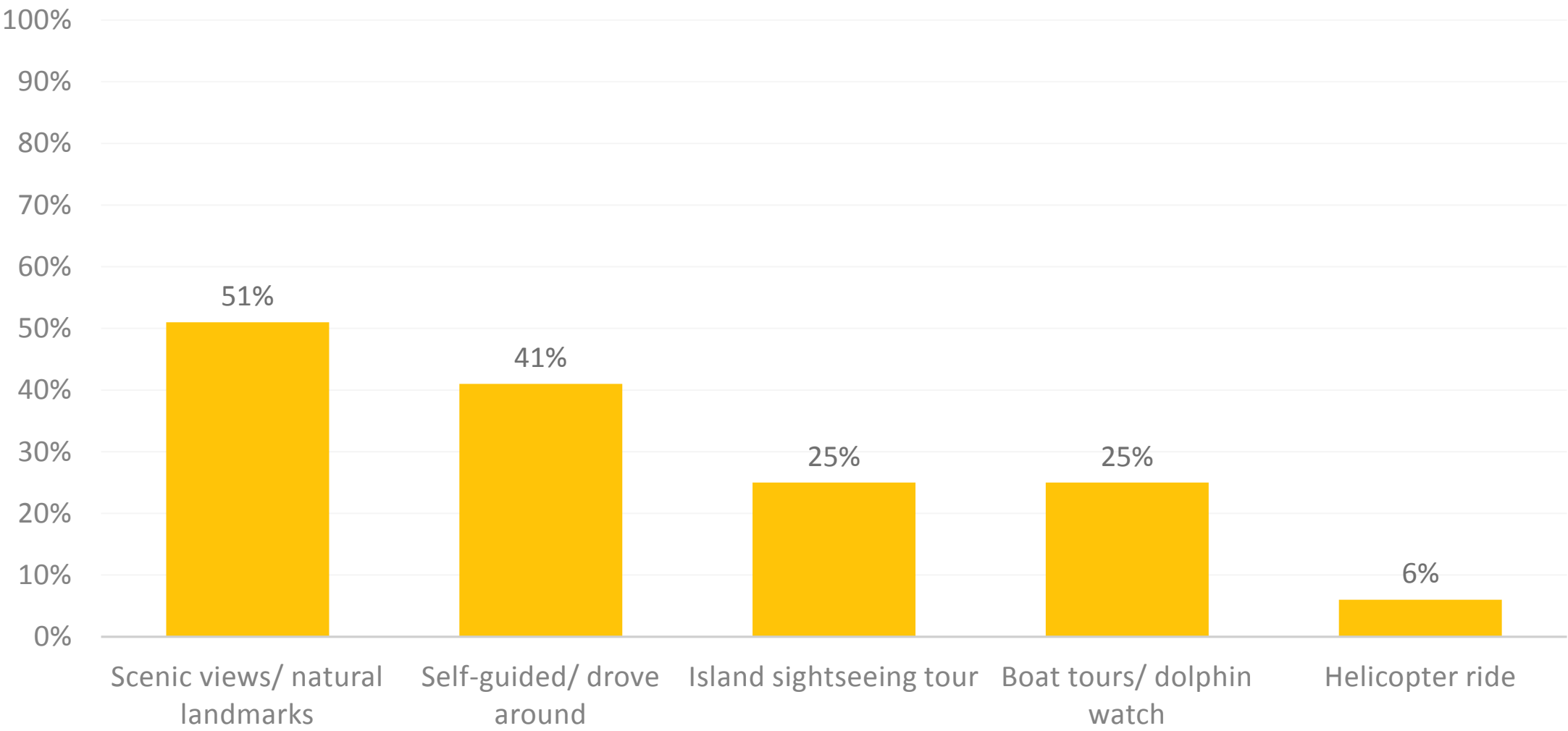
VISITOR ACTIVITIES



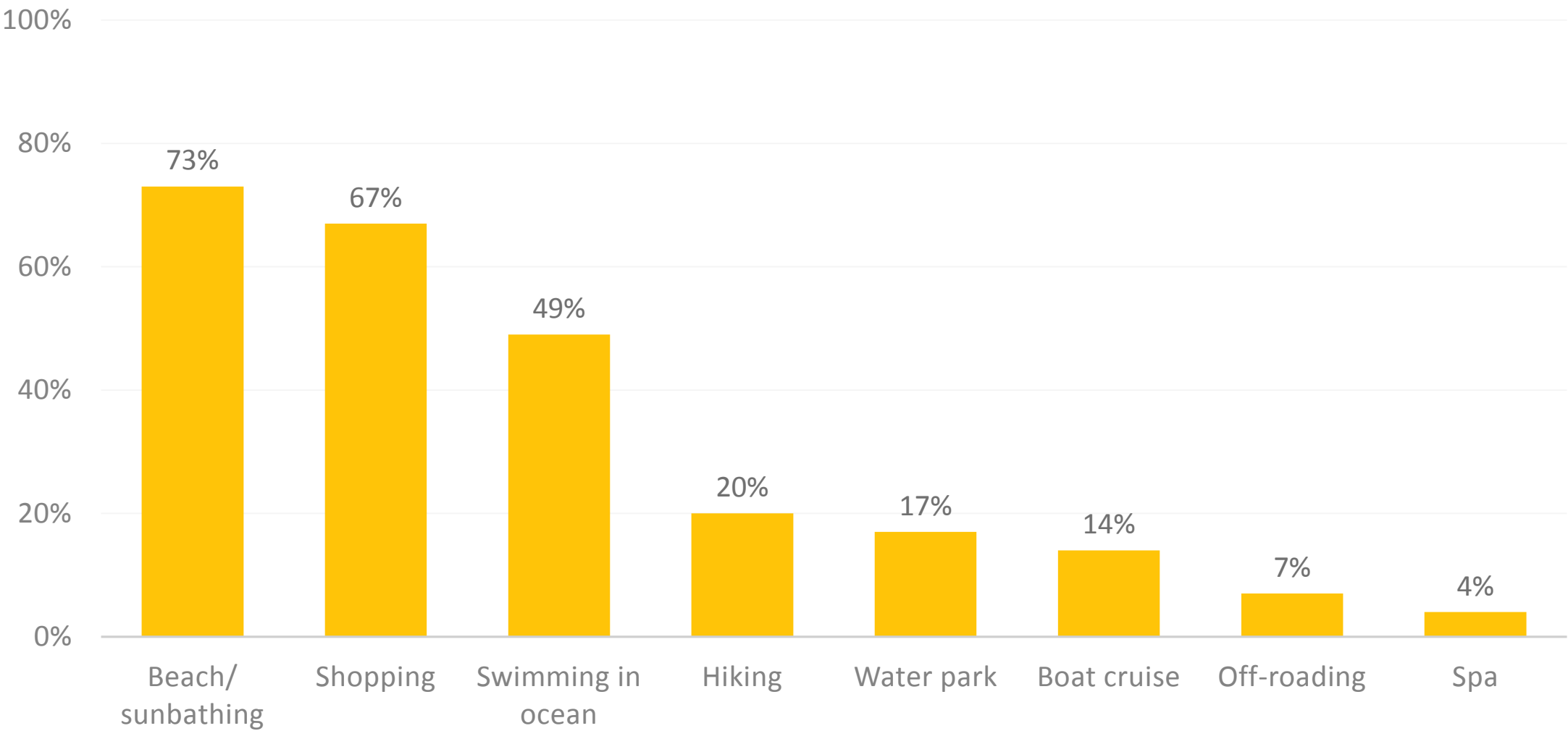
SHOPPING AREAS – PENETRATION



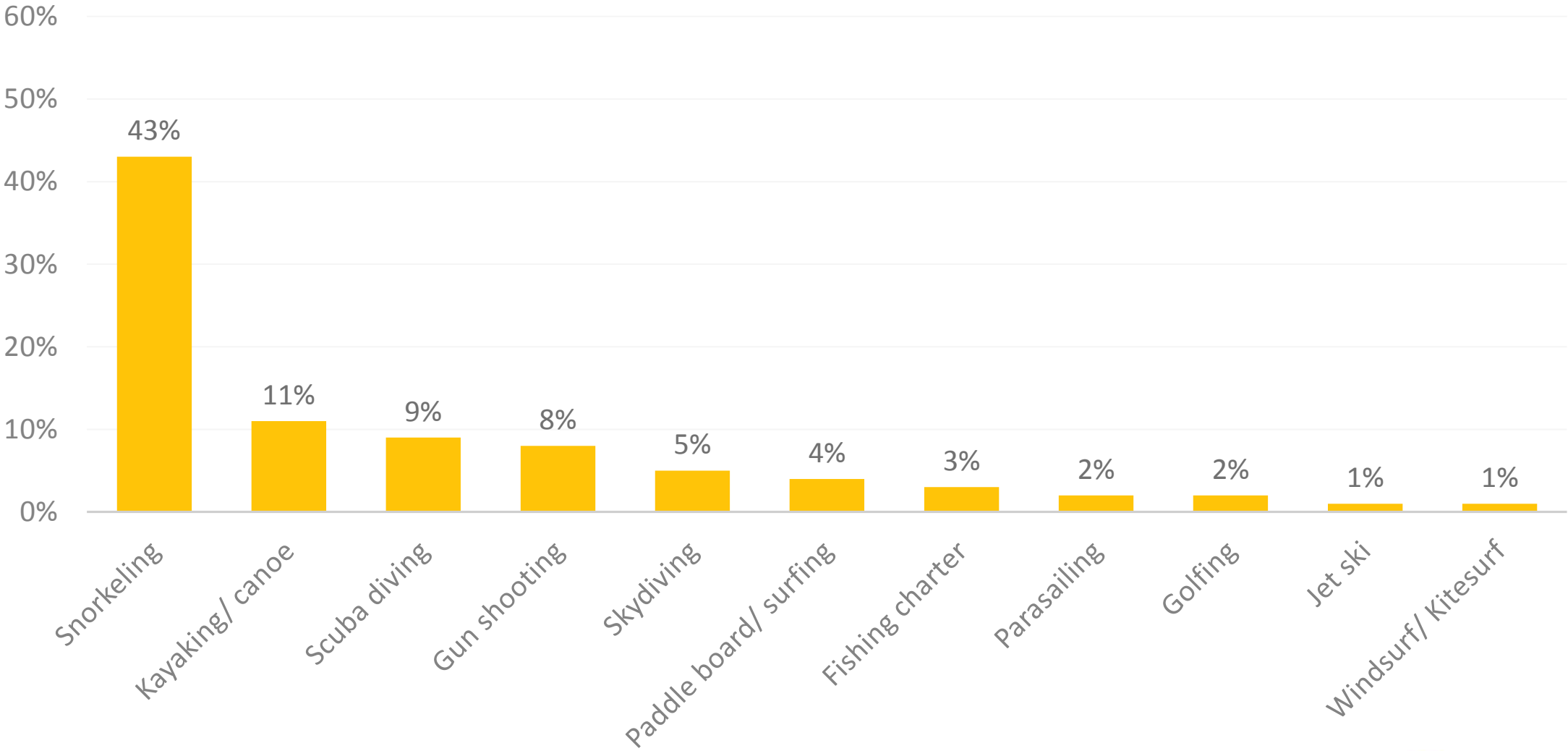
ACTIVITIES – SIGHTSEEING



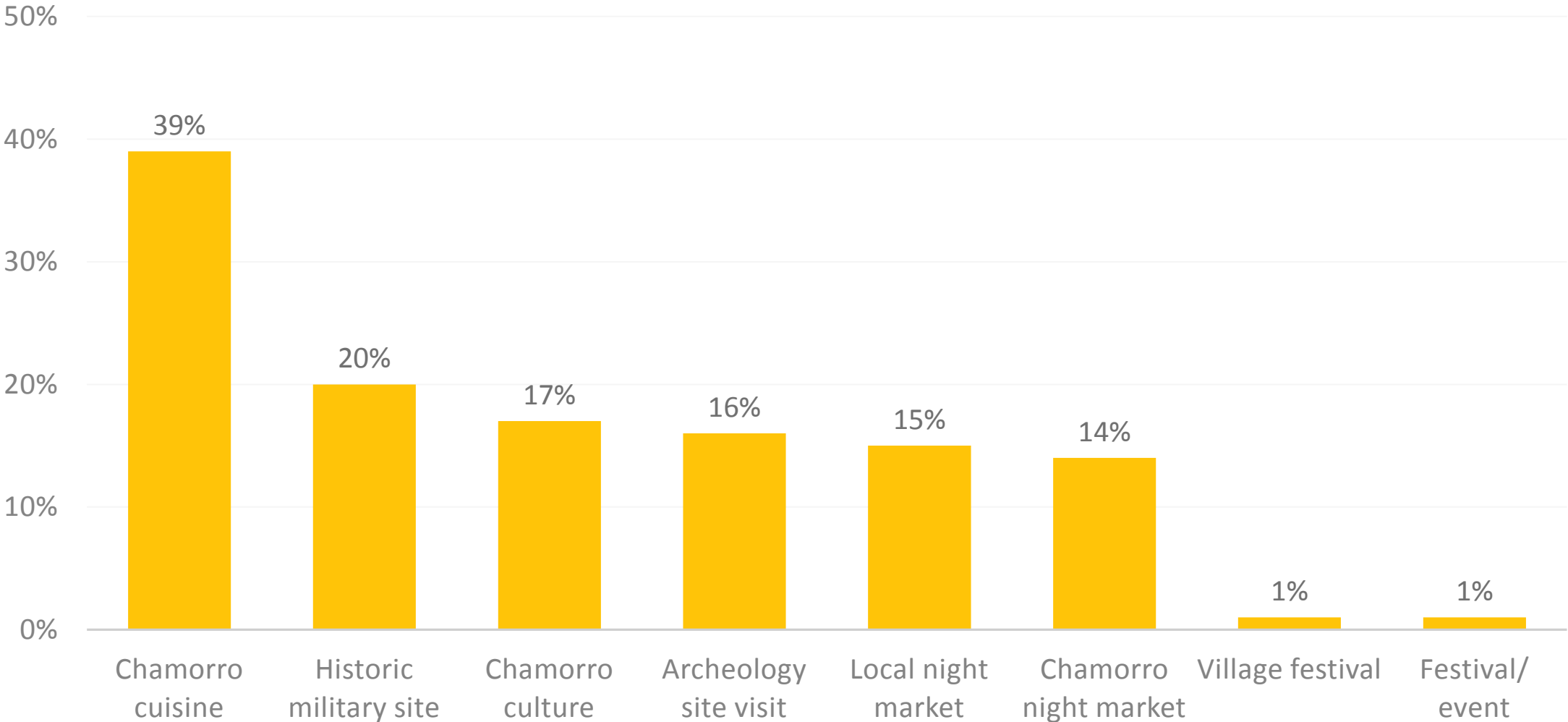
ACTIVITIES – RECREATION



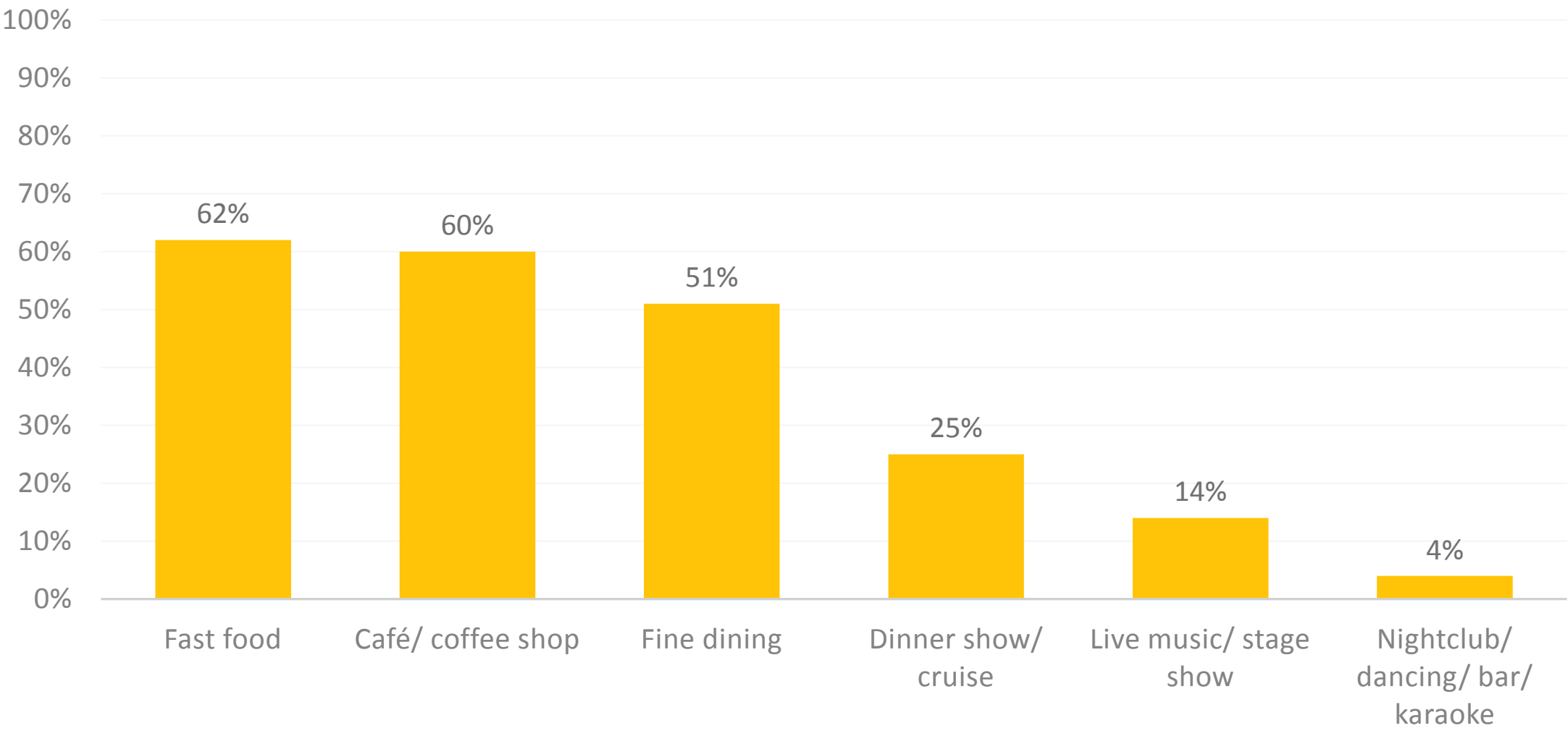
ACTIVITIES – SPORTS



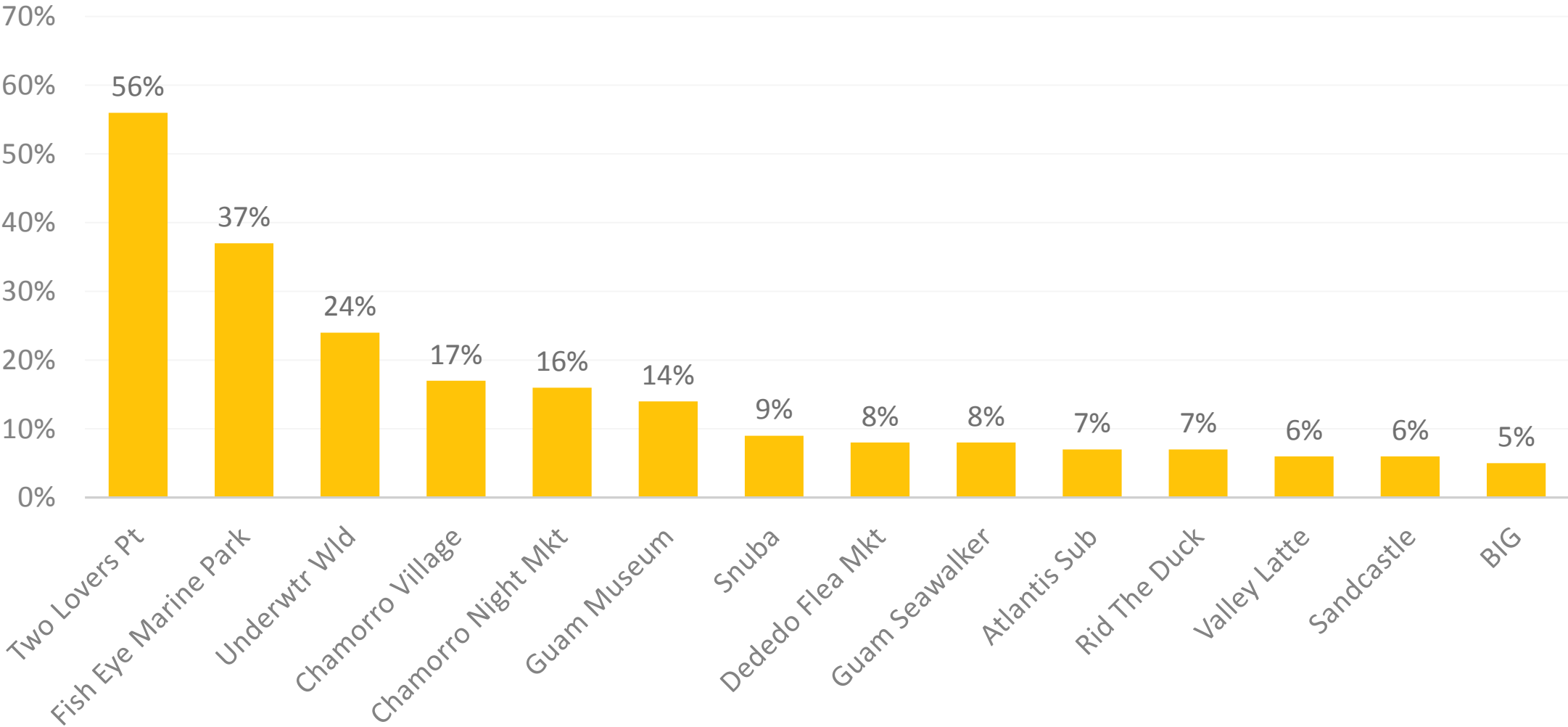
ACTIVITIES – HISTORY, CULTURE, ARTS



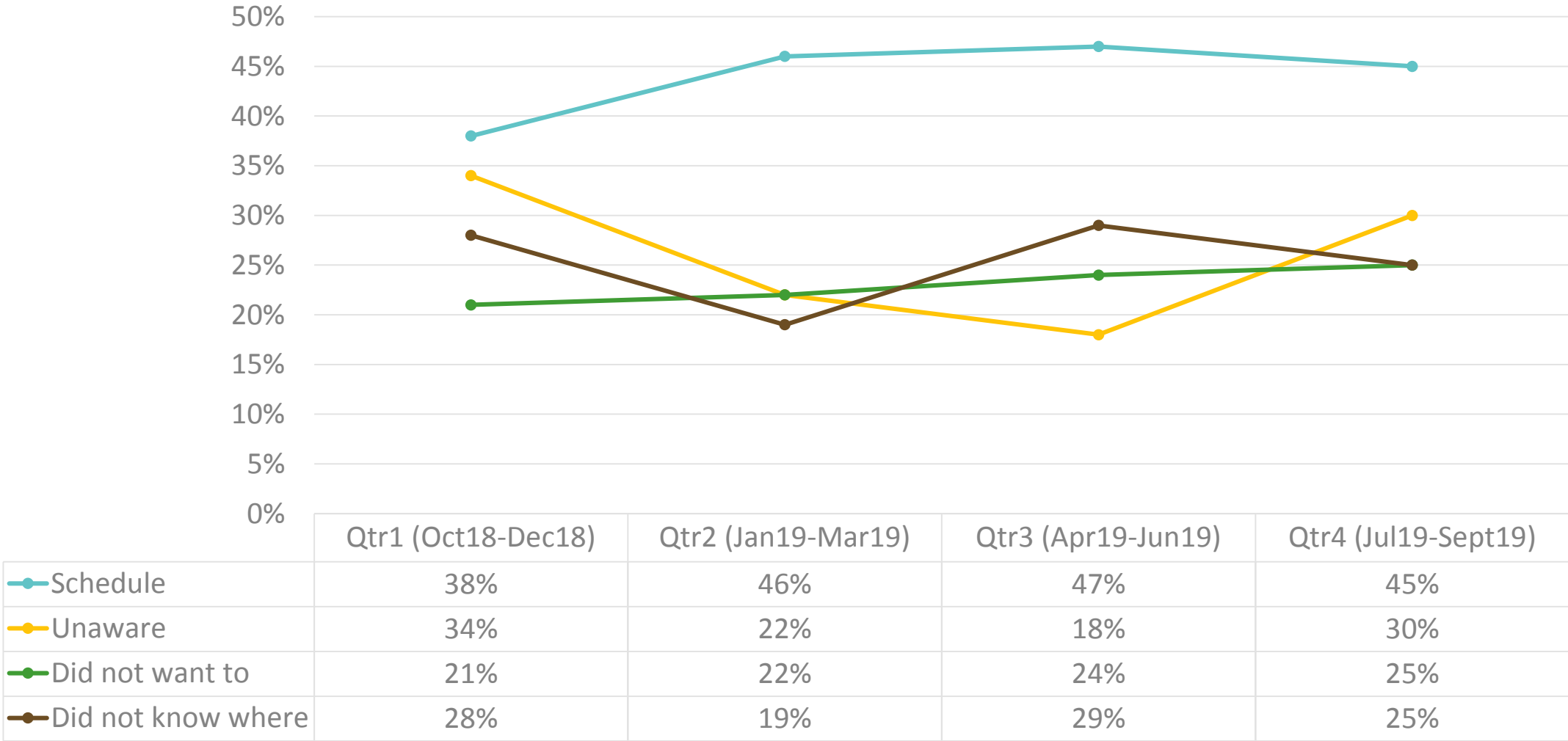
ACTIVITIES – ENTERTAINMENT & DINING



LOCAL ATTRACTIONS – TOP RESPONSES (5%+)



LOCAL CULTURE – OBSTACLES



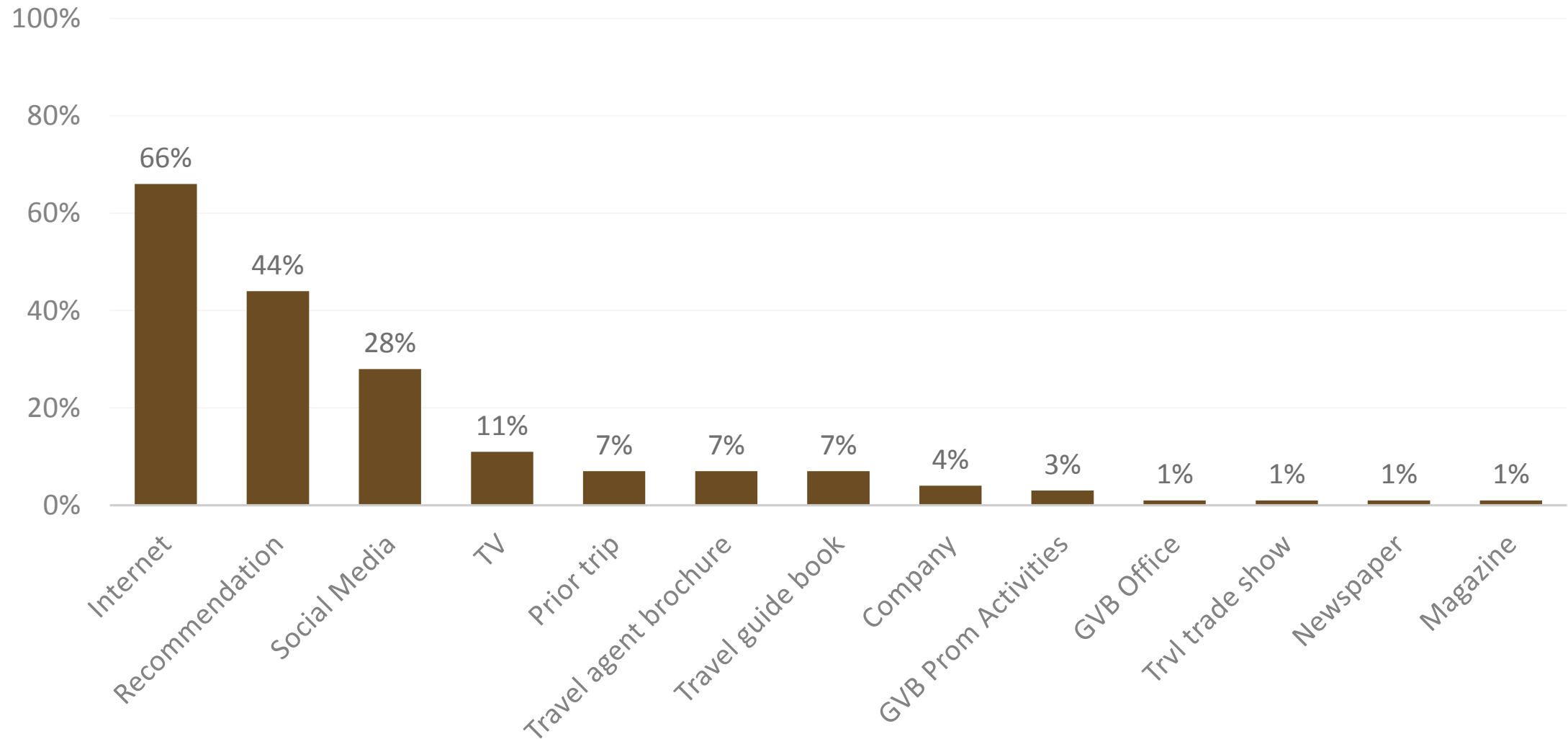


SECTION 6

SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION - SEGMENTATION

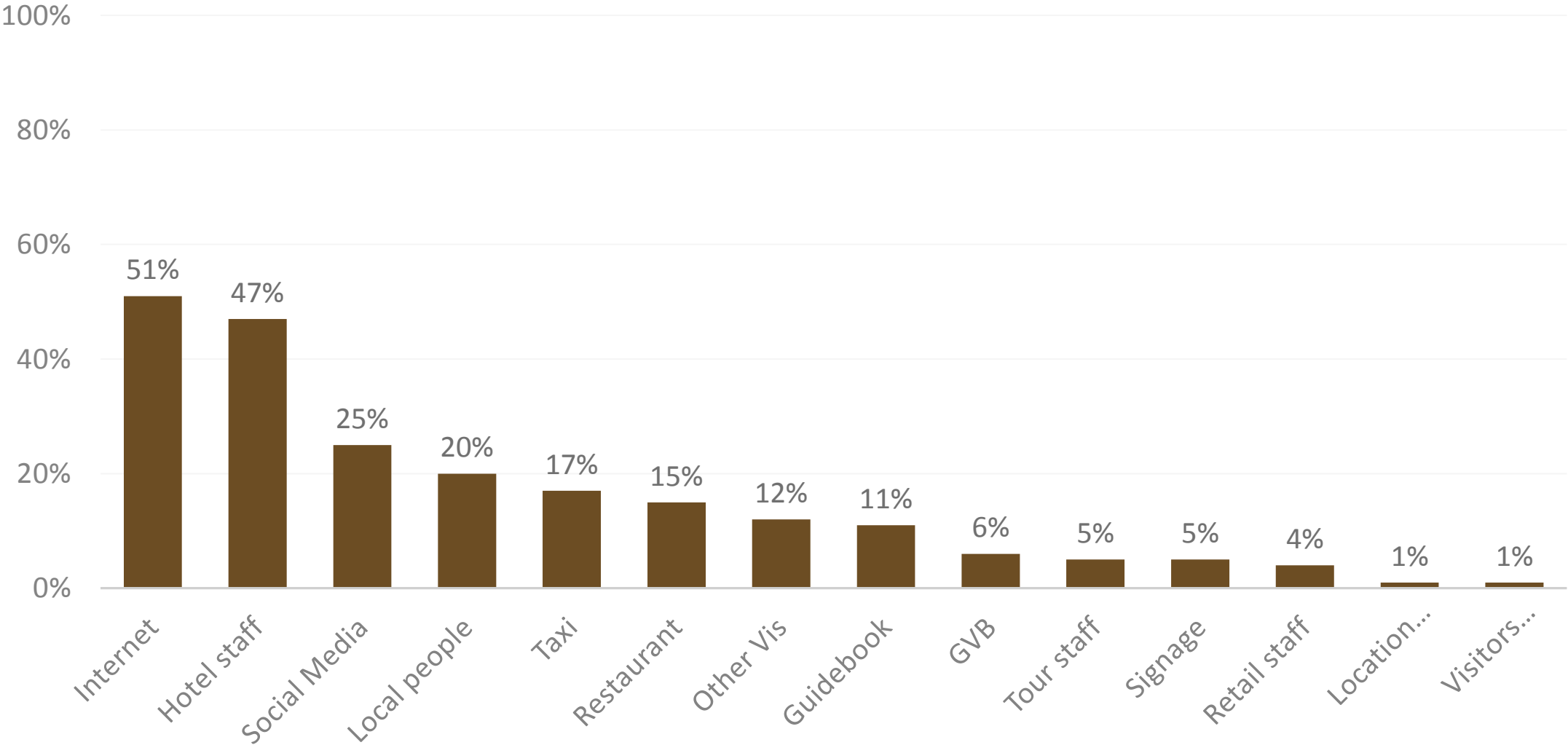
GVB VISITOR SATISFACTION STUDY

Q5 Please select the top three sources of information you used to find out about Guam before your trip

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
Q5	Internet/Mobile App	66%	45%	65%	100%
	Friend or relative	44%	58%	39%	
	Social media	28%	18%	29%	
	TV	11%	12%	14%	
	Travel agent brochure	7%	12%	8%	
	I have been to Guam before	7%	15%	4%	100%
	Travel guide book at bookstores	7%	6%	4%	
	Co-worker/ company travel department	4%	6%	6%	
	Guam Visitors Bureau promotional activities	3%	3%	2%	
	Magazine (consumer)	1%		2%	
	Newspaper	1%			
	Guam Visitors Bureau office	1%			
	Travel trade shows	1%		2%	
	Total	100	33	51	1

Prepared by Anthology Research

ONISLE SOURCES OF INFORMATION



[A]



ONISLE SOURCES OF INFORMATION

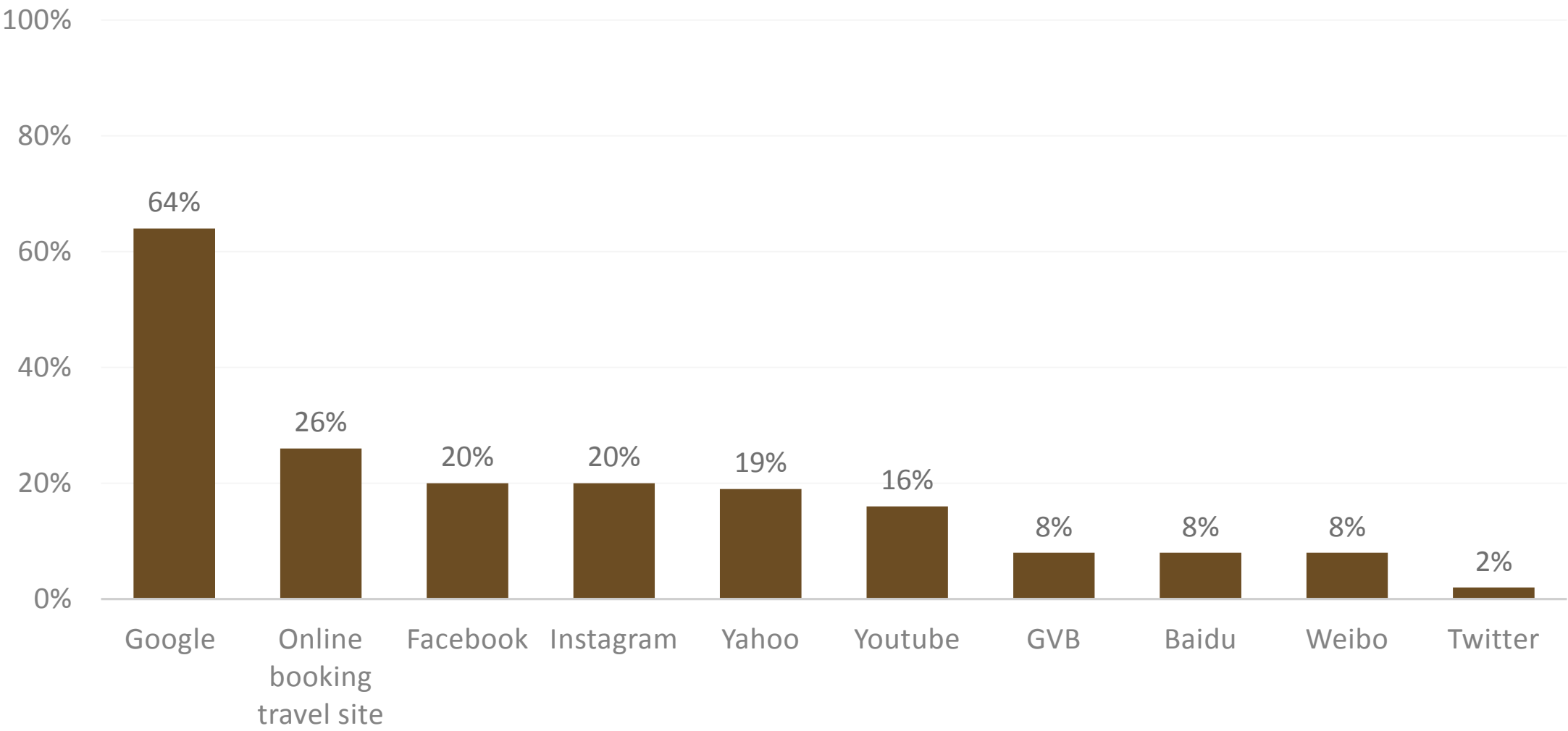
GVB VISITOR SATISFACTION STUDY

Q6 Please select the top three sources of information you used to find out about Guam while you were here

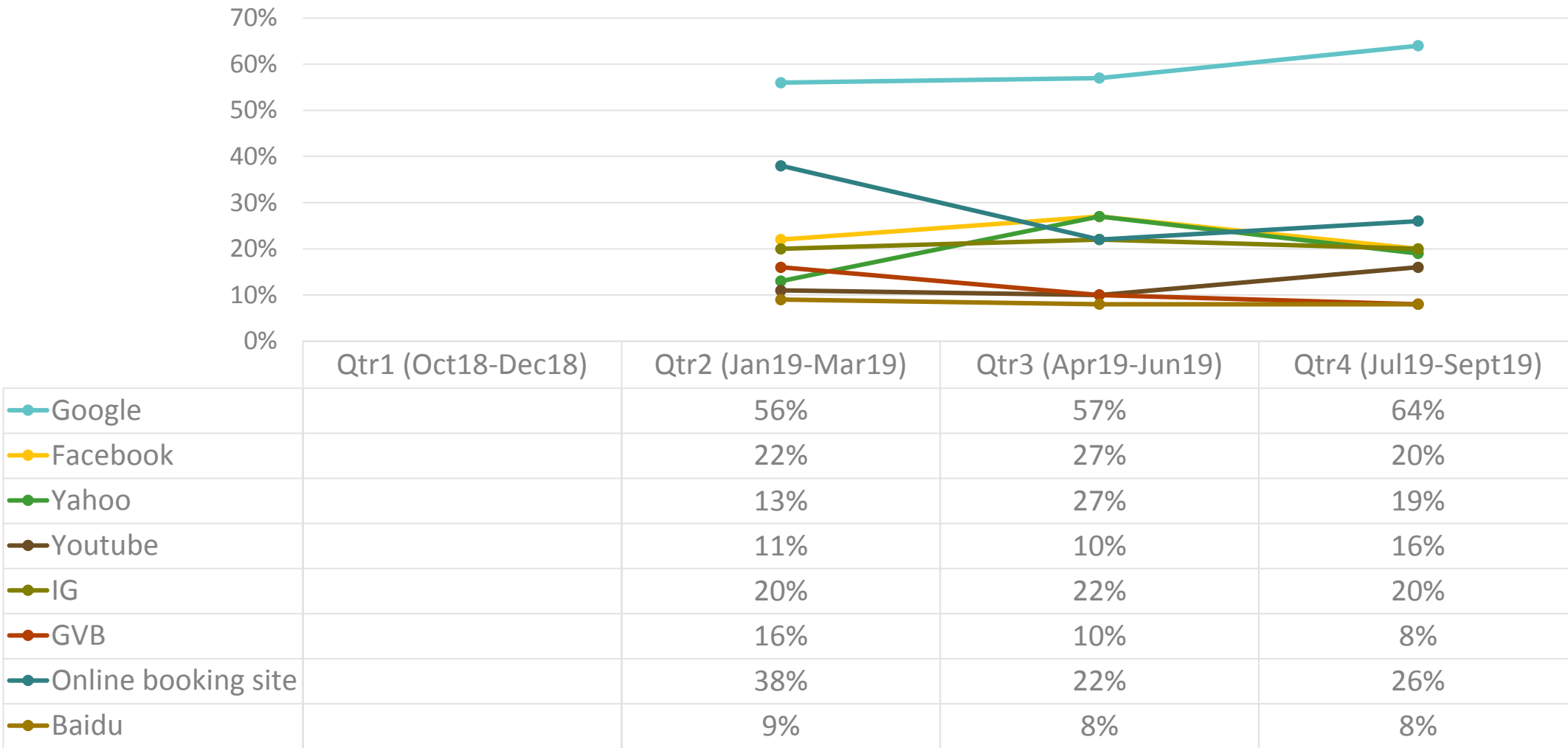
		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
Q6	Internet/ Mobile App	51%	33%	61%	100%
	Hotel staff	47%	58%	51%	
	Social Media	25%	9%	18%	
	Local people	20%	24%	16%	
	Taxi drivers	17%	15%	16%	
	Restaurant staff (outside hotel)	15%	30%	16%	
	Other visitors	12%	15%	12%	
	Guide books I brought with me	11%	15%	14%	
	Guam Visitors Bureau	6%	3%	4%	
	Signs/ advertisement	5%		8%	
	Tour staff	5%		4%	
	Retail staff	4%		2%	
	Visitors channel	1%		2%	
	Local publication	1%		2%	
	Total	100	33	51	1

Prepared by Anthology Research

ONLINE SOURCES OF INFORMATION



ONLINE SOURCES OF INFORMATION



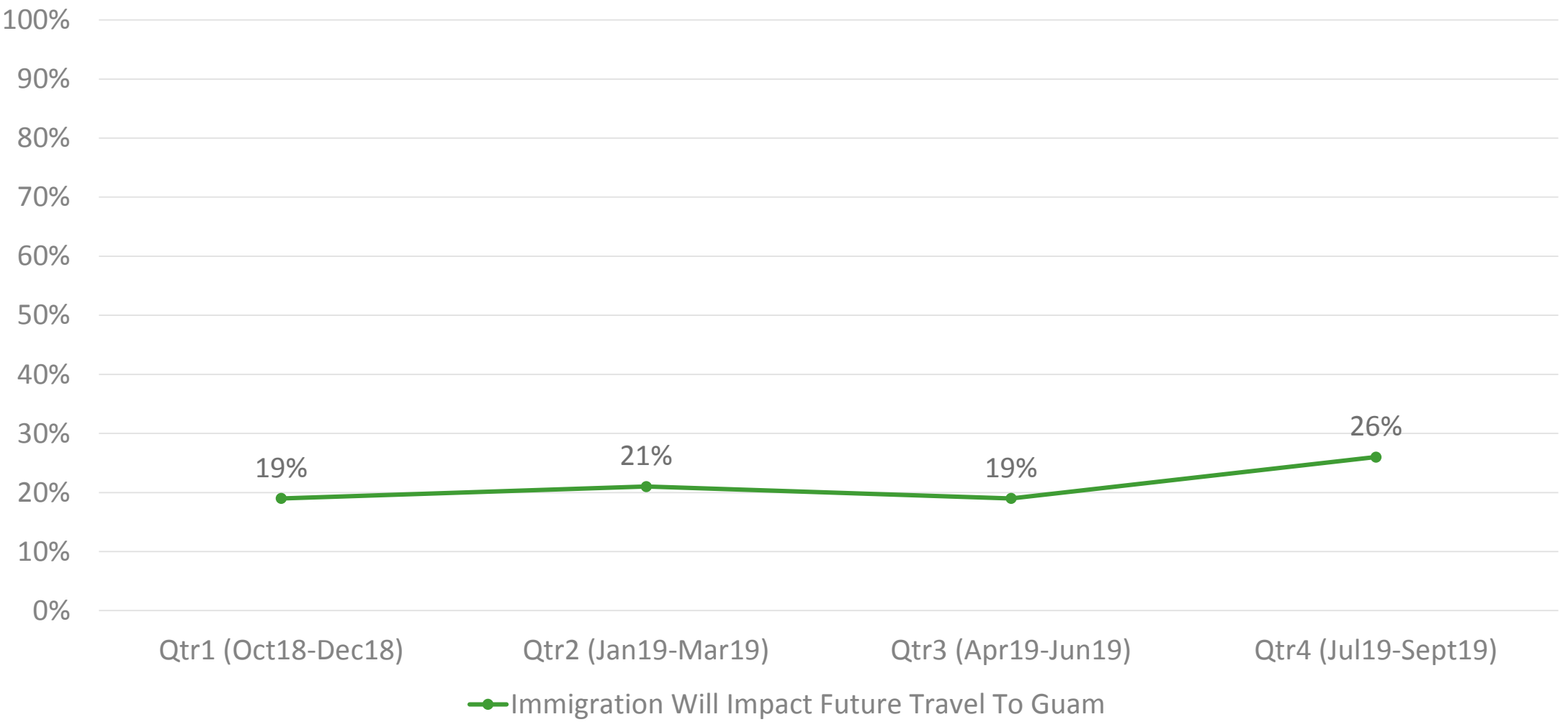


SECTION 7

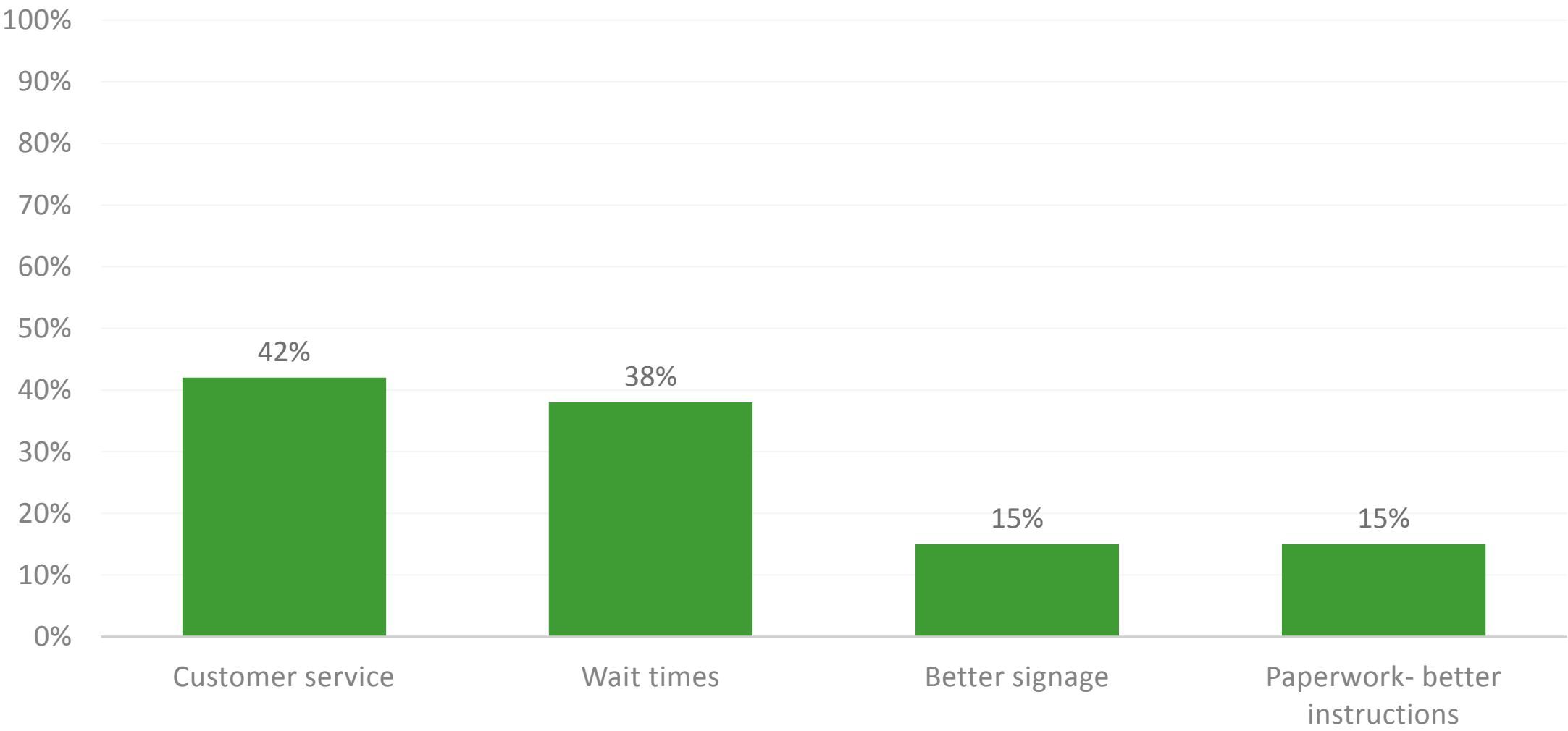
IMMIGRATION



IMPACT OF AIRPORT IMMIGRATION SVC ON FUTURE TRAVEL TO GUAM



AIRPORT – SECURITY/ IMMIGRATION ISSUES





SECTION 8

ADVANCED STATS



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.
- The predictor variables (drivers) are ranked on the percentage they account for the dependent variable. The top two ranked independent variables generally account for the largest percentages of the dependent variable and are thus the best predictors (drivers) of the dependent variable.

DRIVERS – OVERALL SATISFACTION

Comparison of Drivers of Overall Satisfaction, 2-4 Qtr. 2019				
	2nd Qtr 2019	3rd Qtr 2019	4th Qtr 2019	2-4 Qtr 2019
Drivers:	rank	rank	rank	rank
Entertainment		2		3
Shopping	2		2	2
Dining	3			
Beaches				
Parks				
Roads				
Sightseeing Areas				4
Being a safe and secure destination	1	1	1	1
% of Overall Satisfaction Accounted For	39.9%	57.3%	62.7%	55.2%
NOTE: Only significant drivers are included.				

DRIVERS – OVERALL SATISFACTION

- **Overall satisfaction** with the Hong Kong visitor's experience on Guam is driven by two significant factors in the 4th Quarter 2019 Period. By rank order they are:
 - **Being a safe & secure destination, and**
 - **Shopping.**
- With these factors the overall r^2 is .627 meaning that **62.7% of overall satisfaction is accounted for by these factors.**

DRIVERS – ONISLE EXPENDITURES

Comparison of Drivers of Per Person On Island Expenditures, 2-4 Qtr. 2019				
	2nd Qtr 2019	3rd Qtr 2019	4th Qtr 2019	2-4 Qtr 2019
Drivers:	rank	rank	rank	rank
Entertainment				
Shopping				
Dining				
Beaches				
Parks				
Roads				
Sightseeing Areas				
Being a safe and secure destination				
% of Overall Satisfaction Accounted For	0.0%	0.0%	0.0%	0.0%
NOTE: Only significant drivers are included.				

DRIVERS – ONISLE EXPENDITURES

- **Per Person On Island Expenditure** of Hong Kong visitors on Guam is driven by no significant factor in the 4th Quarter 2019 Period.