



Guam Visitors Bureau

Hong Kong Visitor Tracker Exit Profile & Market Segmentation Report

FY2019 DATA AGGREGATION

[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 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.



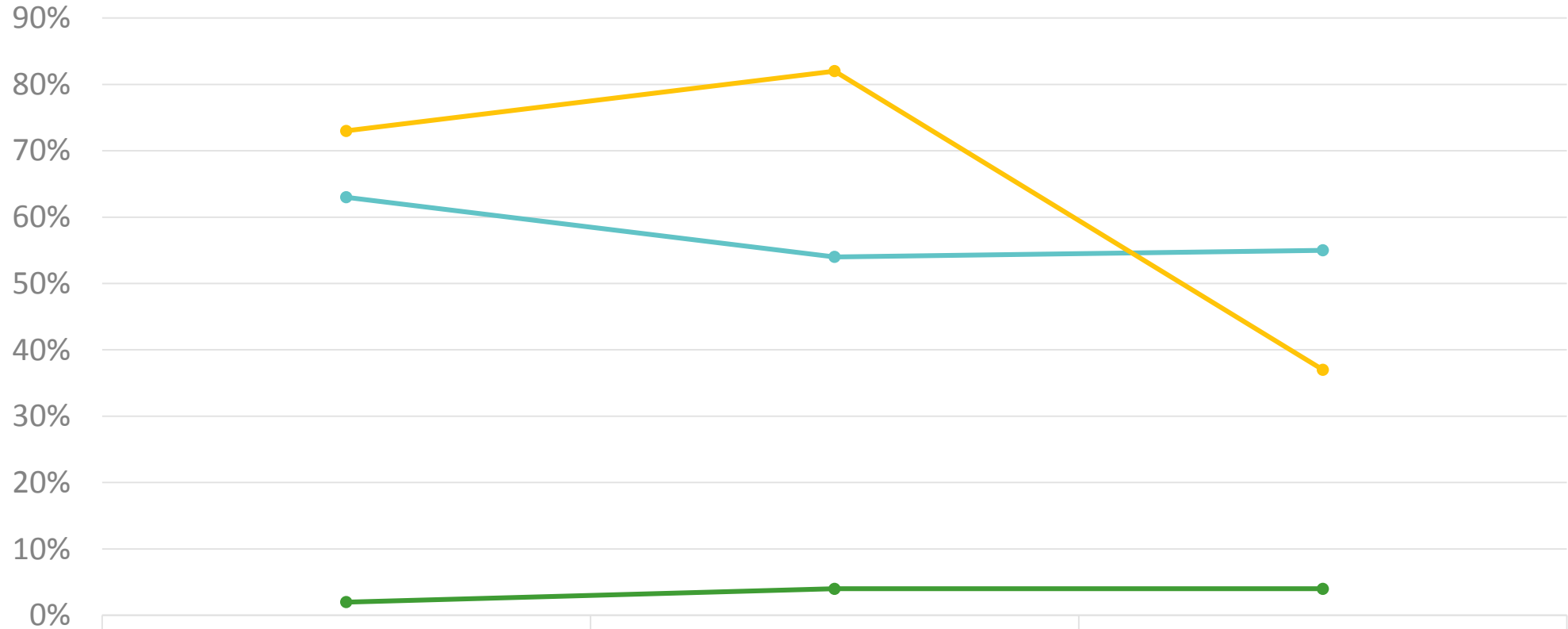
Objectives

- 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.

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



	FY2017	FY2018	FY2019
Family	63%	54%	55%
FIT	73%	82%	37%
Honeymoon	2%	4%	4%



SECTION 1

PROFILE OF RESPONDENTS



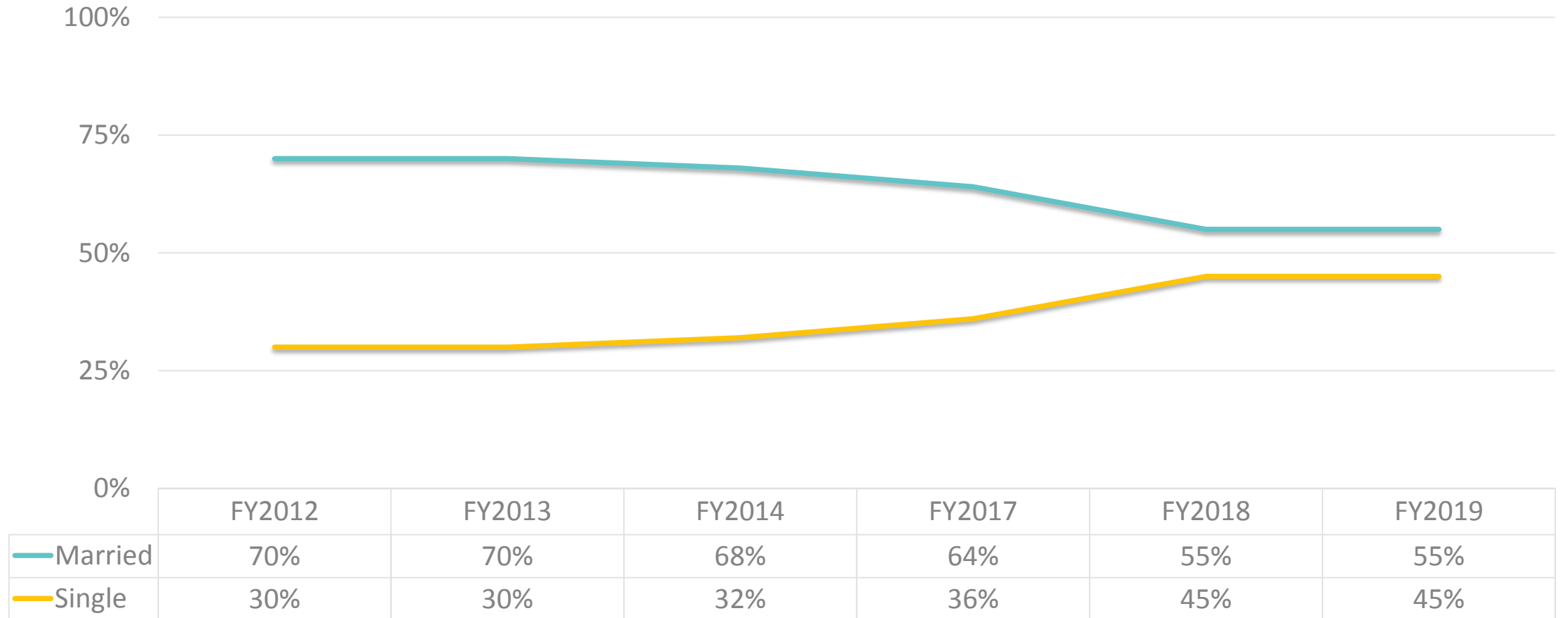
GENDER



MARITAL STATUS



MARITAL STATUS – TRACKING



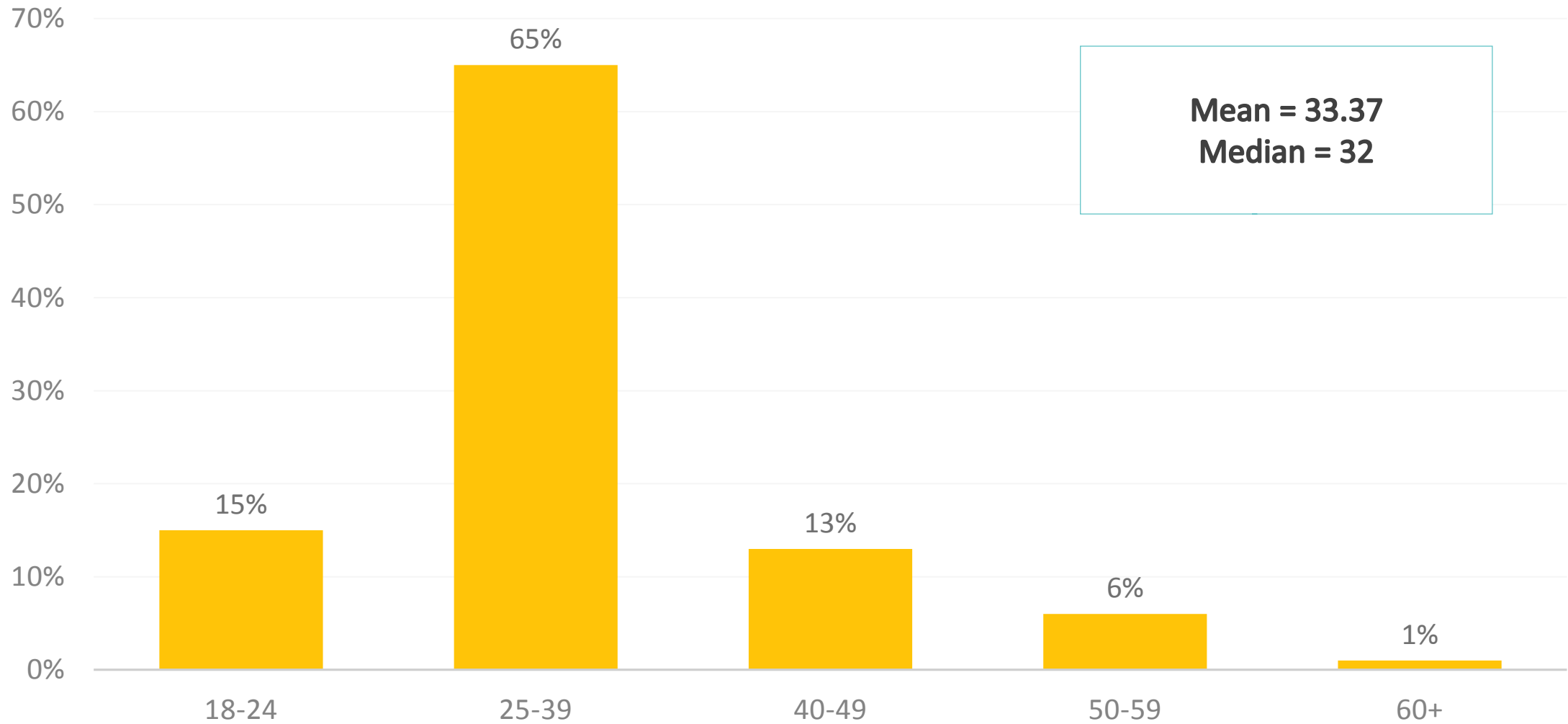
MARITAL STATUS – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
QE Are you married or single?

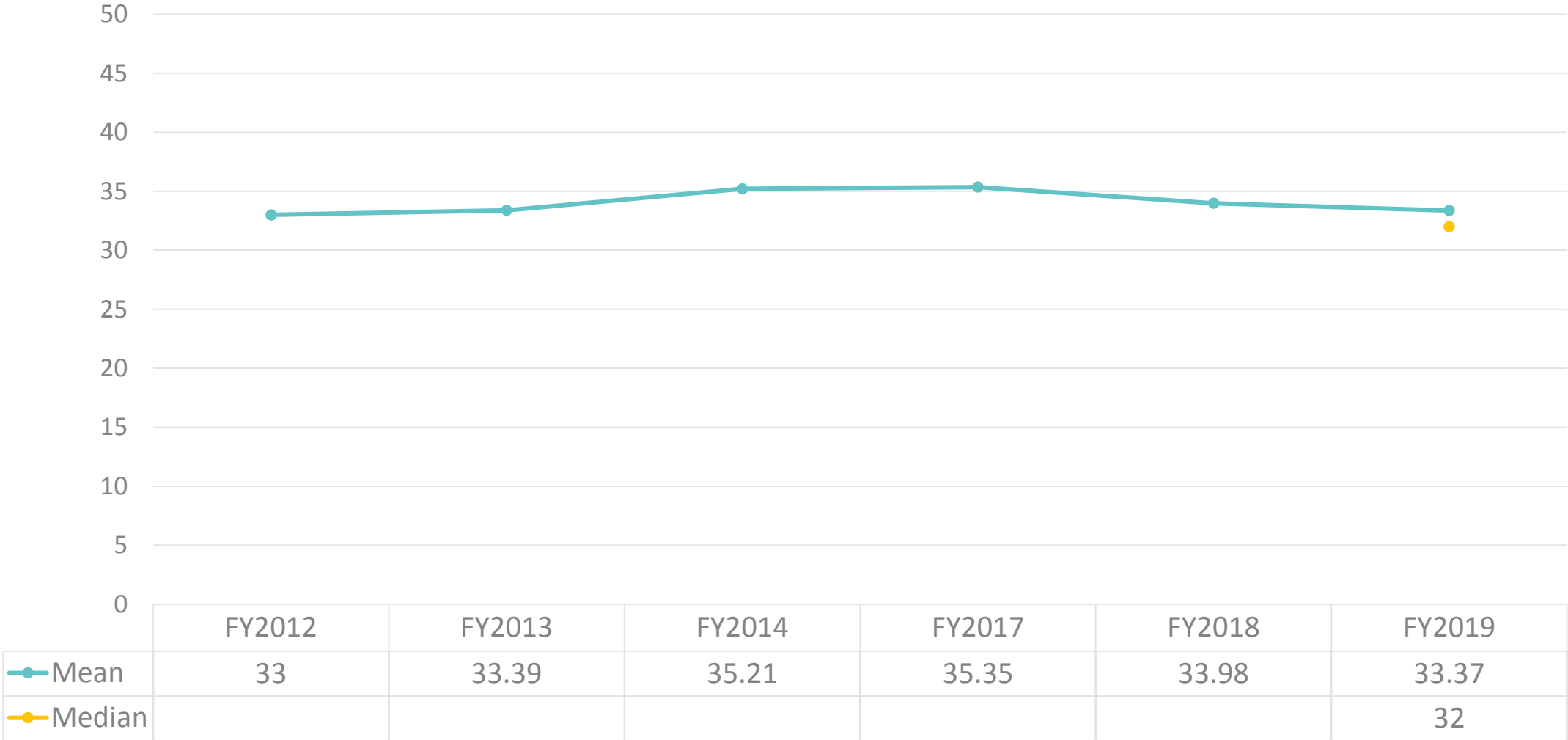
		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
QE	Married	55%	48%	78%	100%
	Single	45%	52%	22%	
	Total	424	116	175	12

Prepared by Anthology Research

AGE



AGE – TRACKING



AGE – SEGMENTATION

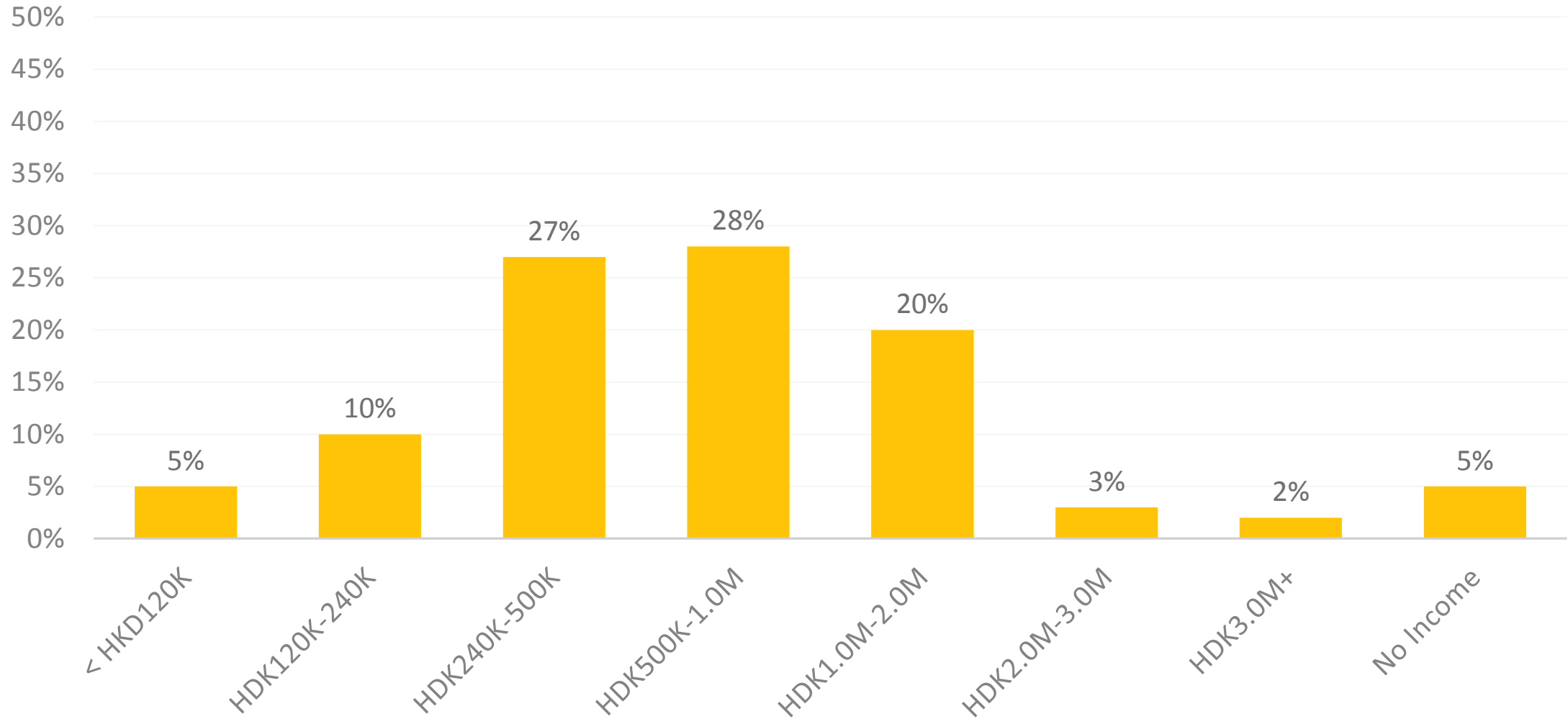
GVB VISITOR SATISFACTION STUDY
QF What was your age on your last birthday?

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
QF	18-24	15%	11%	15%	17%
	25-39	65%	68%	57%	83%
	40-49	13%	15%	18%	
	50-59	6%	5%	8%	
	60+	1%	1%	2%	
	Total	424	116	175	12
QF	Mean	33.37	33.66	34.81	28.92
	Median	32	32	33	30

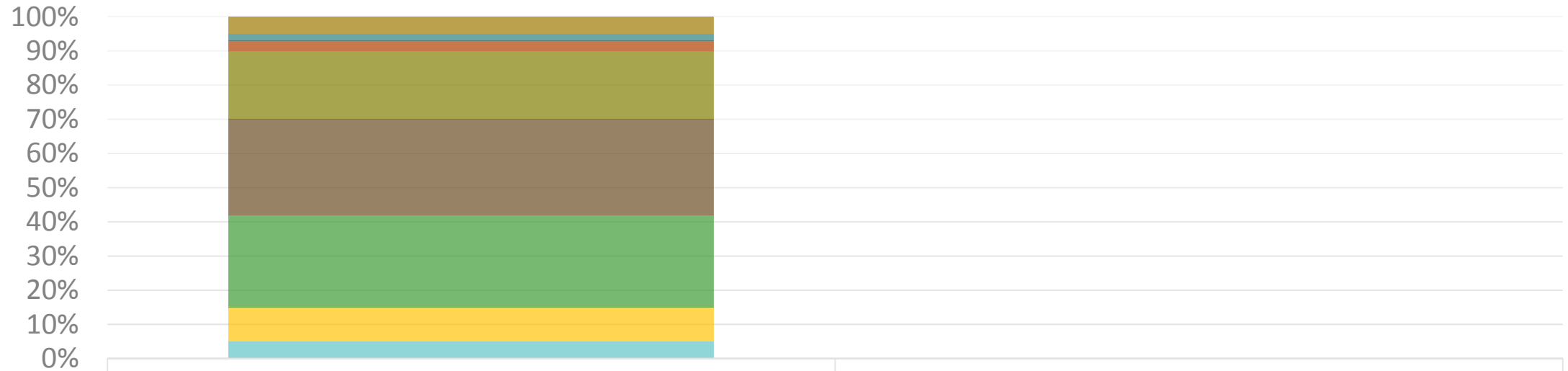
Prepared by Anthology Research



HOUSEHOLD INCOME



HOUSEHOLD INCOME



	FY2019	FY2020
No Income	5%	
HDK3.0M+	2%	
HDK2.0M-3.0M	3%	
HDK1.0M-2.0M	20%	
HDK500K-1.0M	28%	
HDK240K-500K	27%	
HDK120K-240K	10%	
< HKD120K	5%	

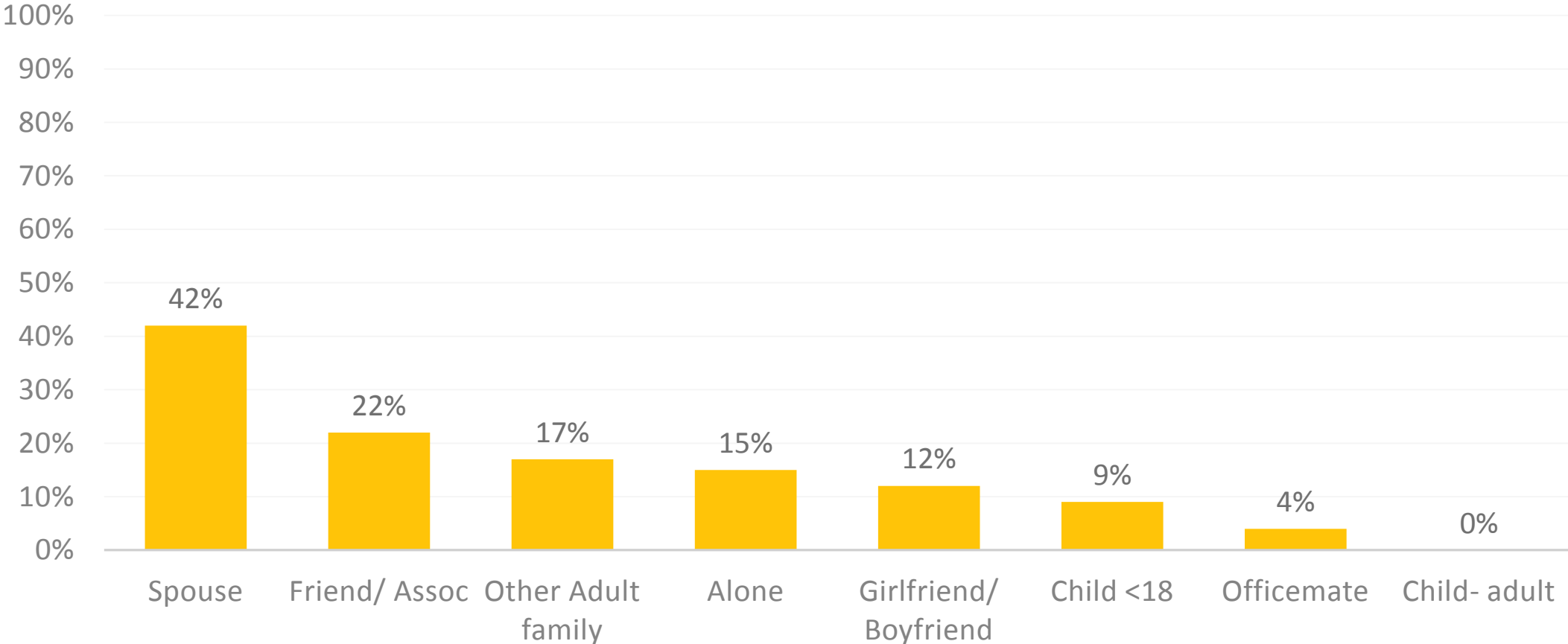
HOUSEHOLD INCOME – SEGMENTATION

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

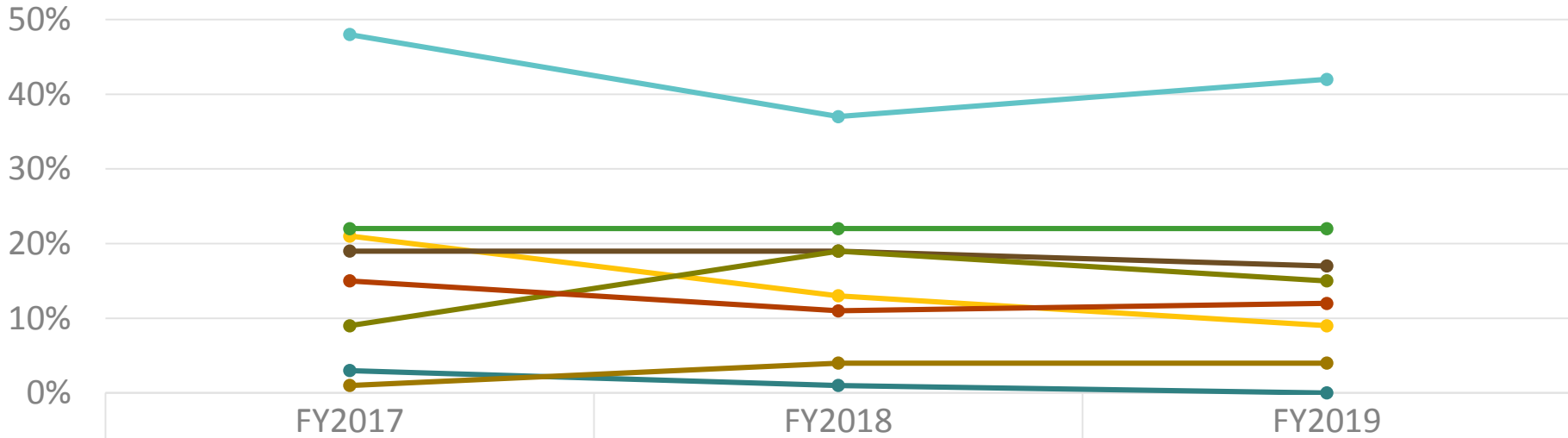
		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
D2	< HKD120K	5%	2%	3%	
	HKD120K-240K	10%	8%	12%	25%
	HKD240K-500K	27%	24%	19%	17%
	HKD500K-1.0M	28%	41%	34%	25%
	HKD1.0M-2.0M	20%	22%	22%	33%
	HKD2.0M-3.0M	3%	1%	2%	
	HKD3.0M+	2%	1%	3%	
	No income	5%	3%	5%	
	Total	421	116	175	12

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TRAVEL PARTY



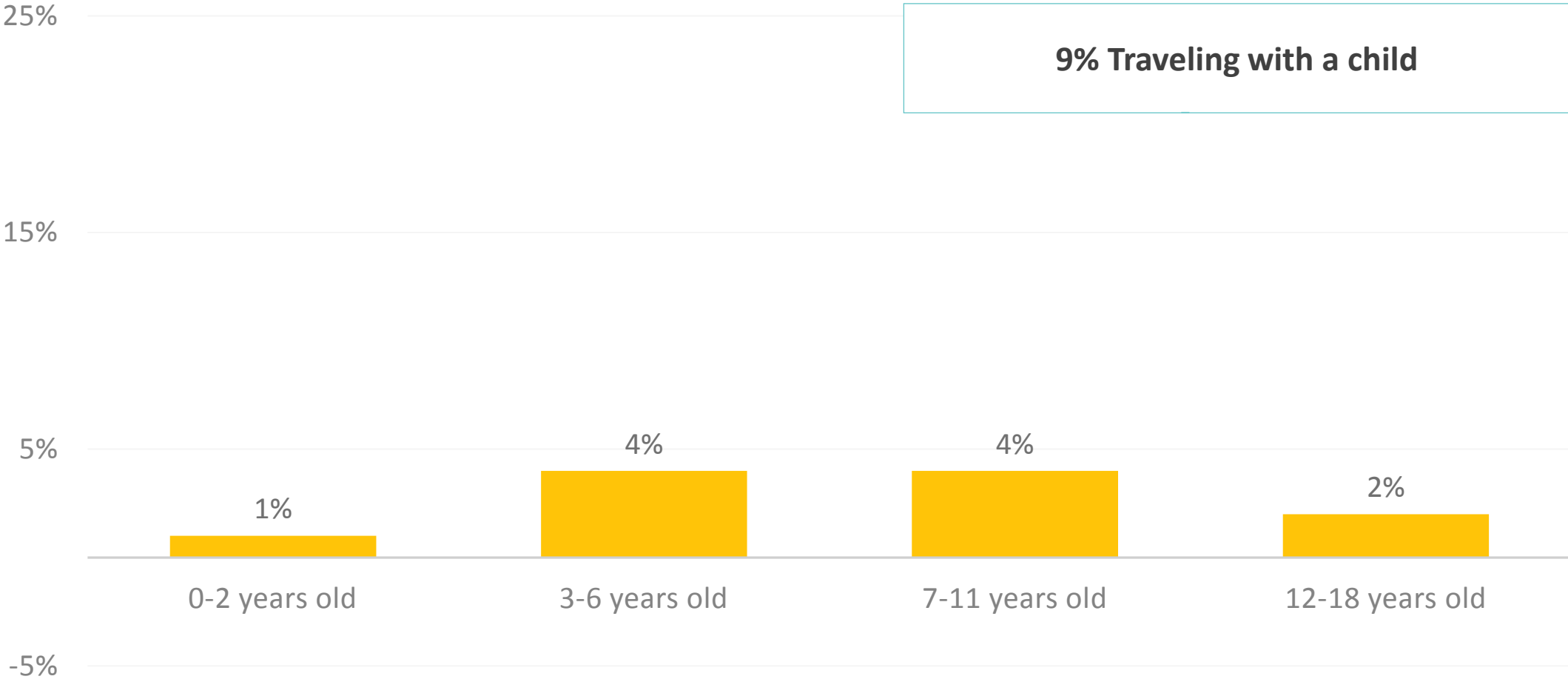
TRAVEL PARTY – TRACKING



	FY2017	FY2018	FY2019
Spouse	48%	37%	42%
Child <18	21%	13%	9%
Friend/ Assoc	22%	22%	22%
Other Adult Family	19%	19%	17%
Alone	9%	19%	15%
Girlfriend/ Boyfriend	15%	11%	12%
Child- Adult	3%	1%	0%
Office	1%	4%	4%

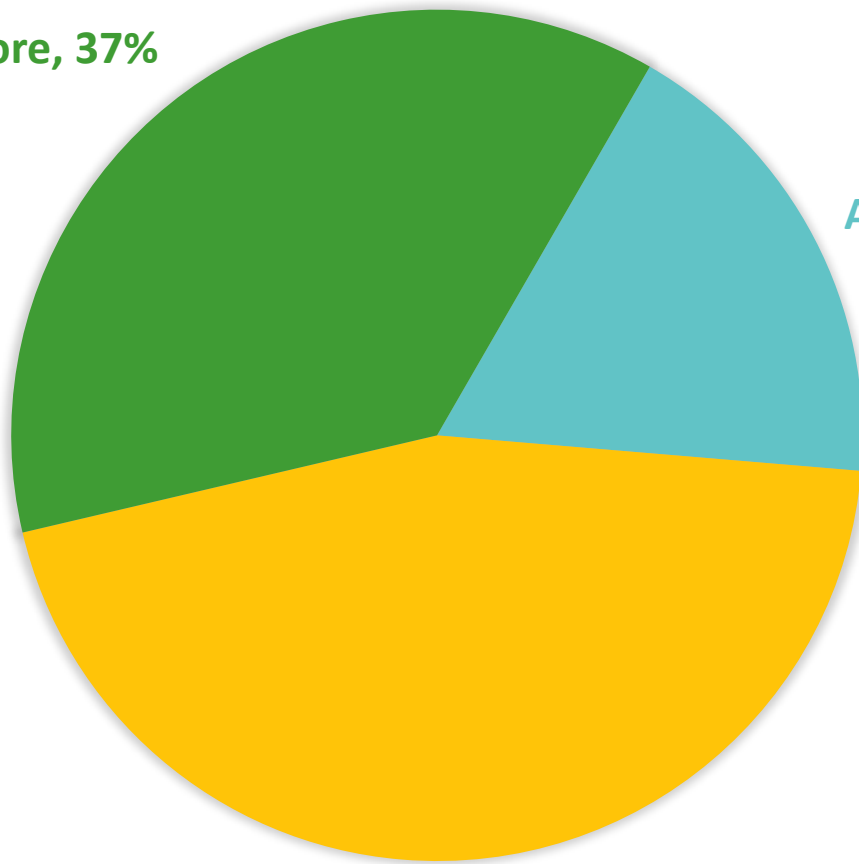


TRAVEL PARTY – CHILD UNDER 18



TRAVEL PARTY SIZE

Three or more, 37%

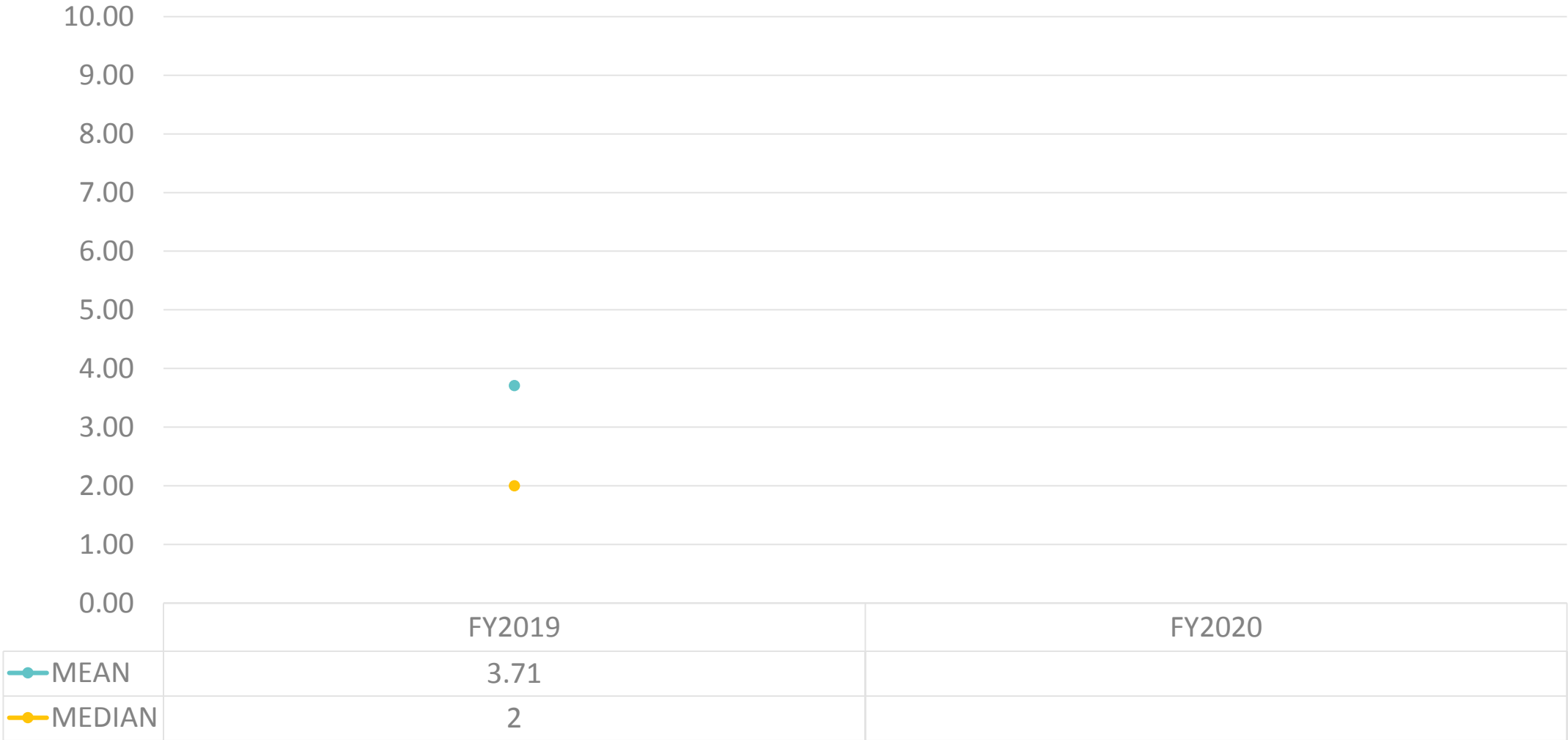


Alone, 18%

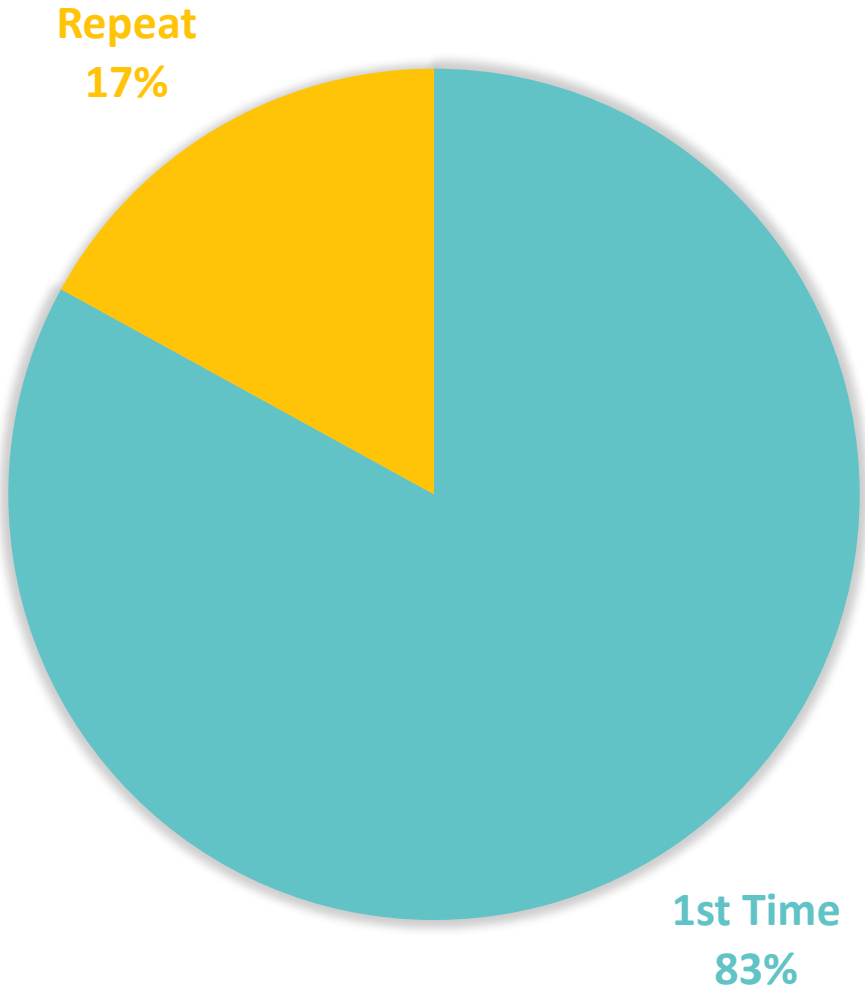
Two persons, 45%

Mean = 3.71
Median = 2

TRAVEL PARTY SIZE – TRACKING



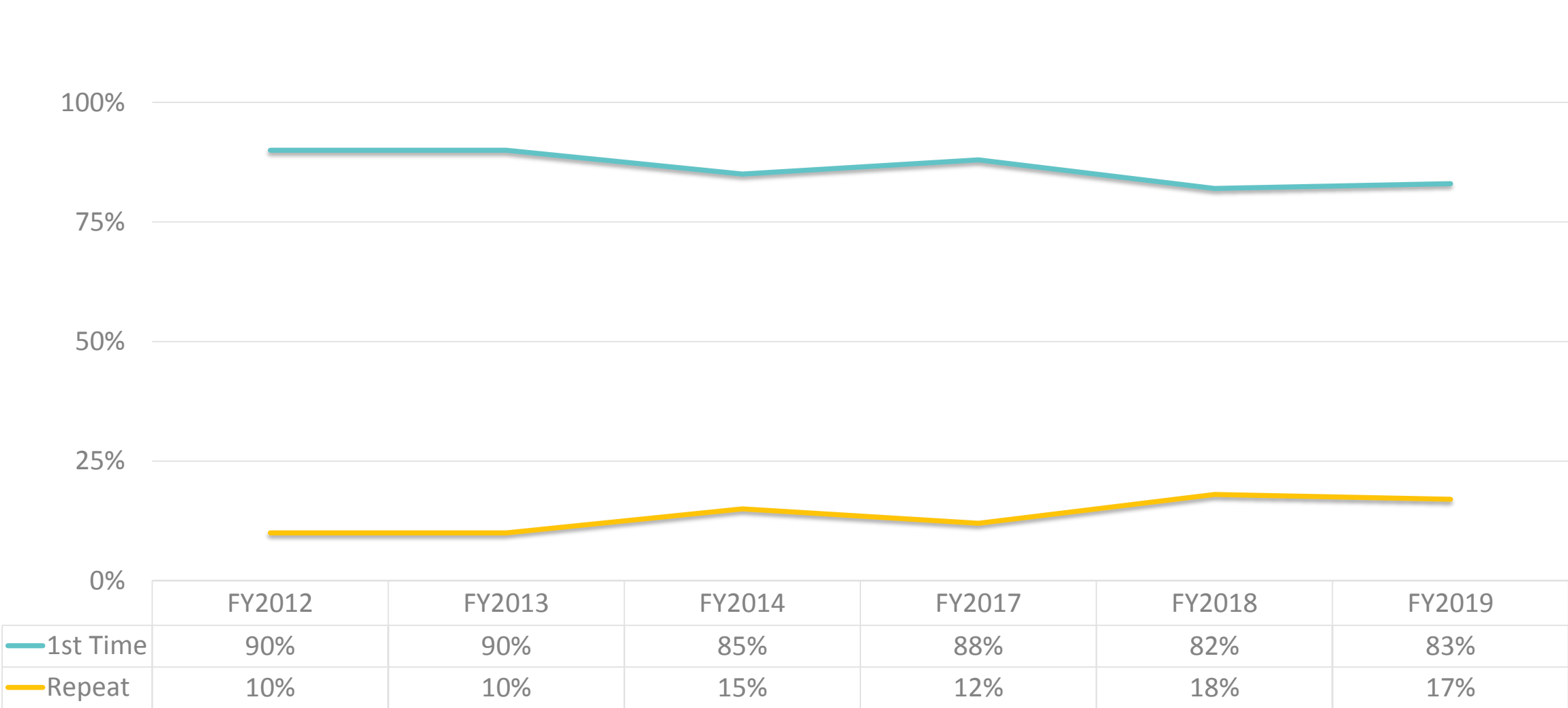
TRIPS TO GUAM



Mean = 1.39
Median = 1



TRIPS TO GUAM – TRACKING



TRIPS TO GUAM – SEGMENTATION

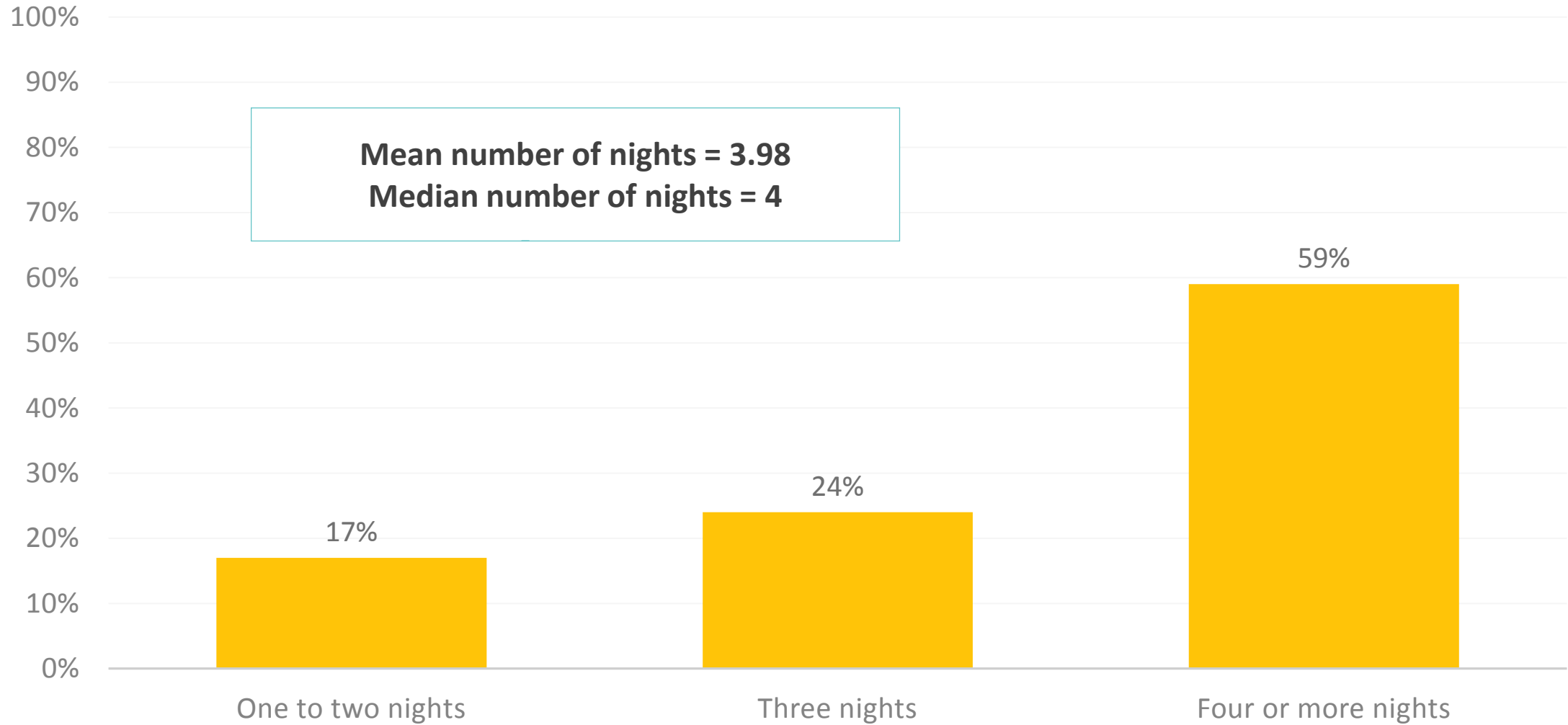
GVB VISITOR SATISFACTION STUDY
Q9 Including this trip, how many times have you been to Guam?

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
Q9	1st time	83%	80%	84%	83%
	Repeat	17%	20%	16%	17%
	Total	424	116	175	12
Q9	Mean	1.39	1.59	1.29	1.25
	Median	1	1	1	1

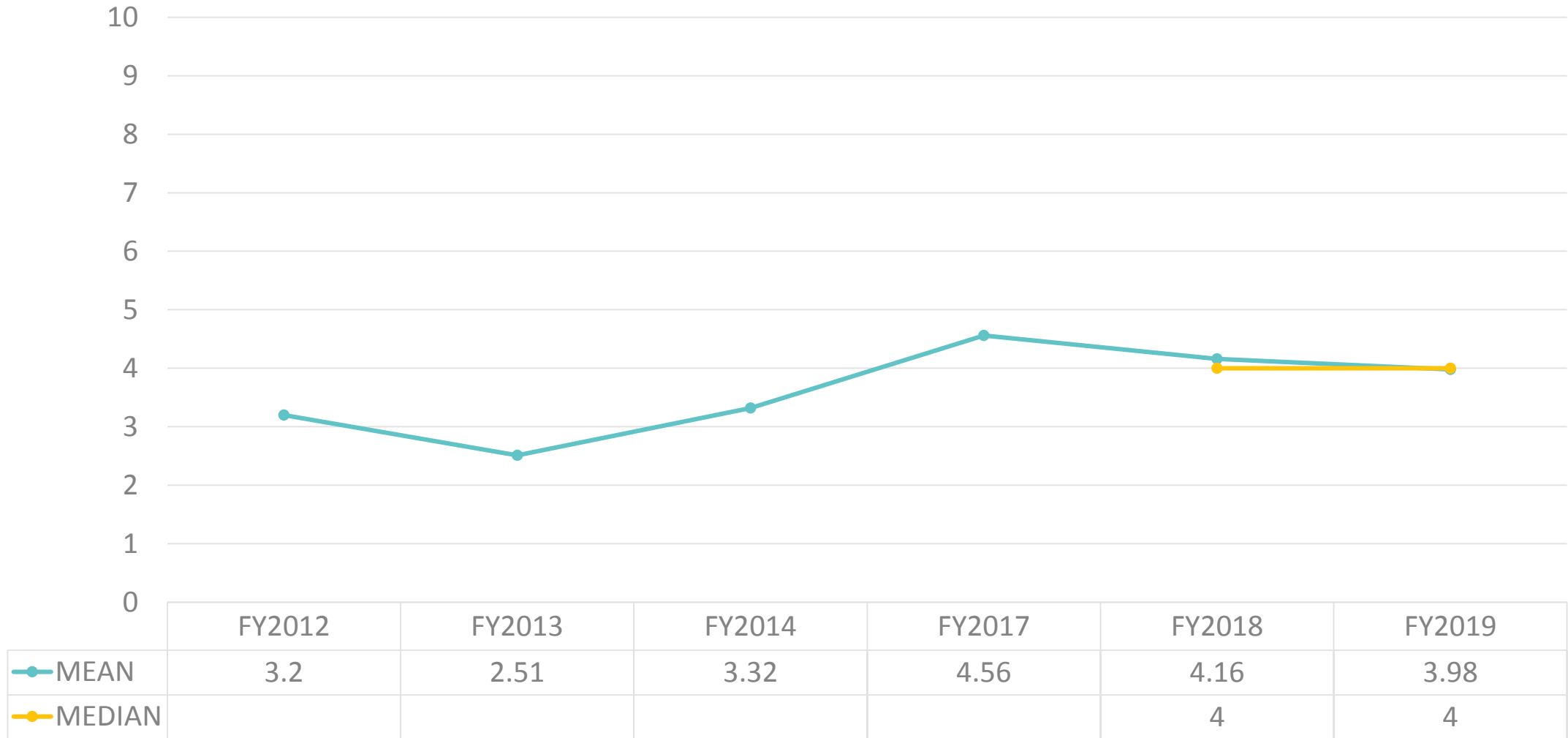
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LENGTH OF STAY



LENGTH OF STAY – TRACKING



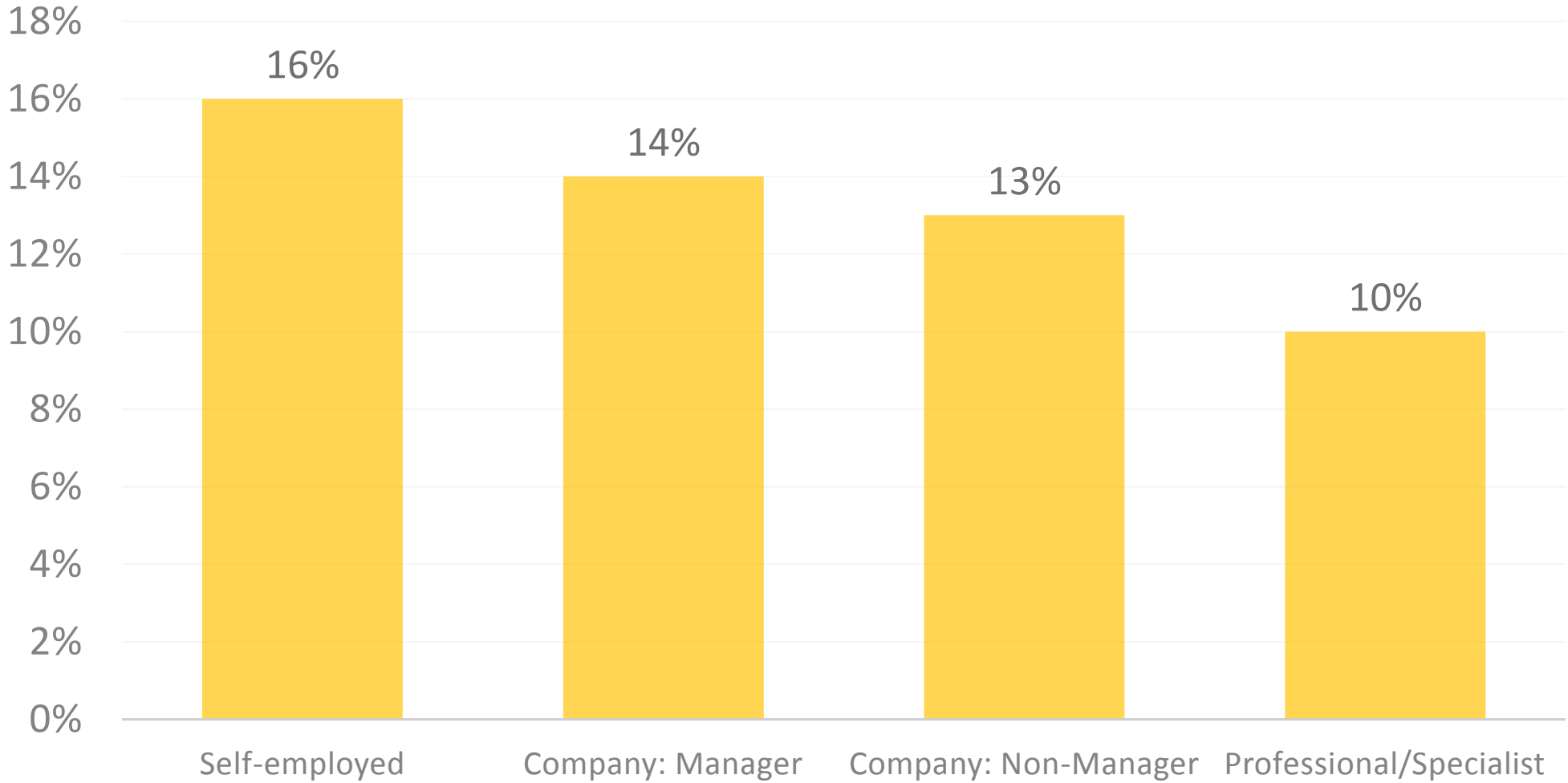
LENGTH OF STAY – SEGMENTATION

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

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
SA	1-2 nights	17%	19%	9%	8%
	3 nights	24%	35%	26%	8%
	4+	59%	46%	65%	83%
	Total	424	116	175	12
SA	Mean	3.98	3.93	4.30	4.92
	Median	4	3	4	5

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OCCUPATION – Top Responses (10%+)

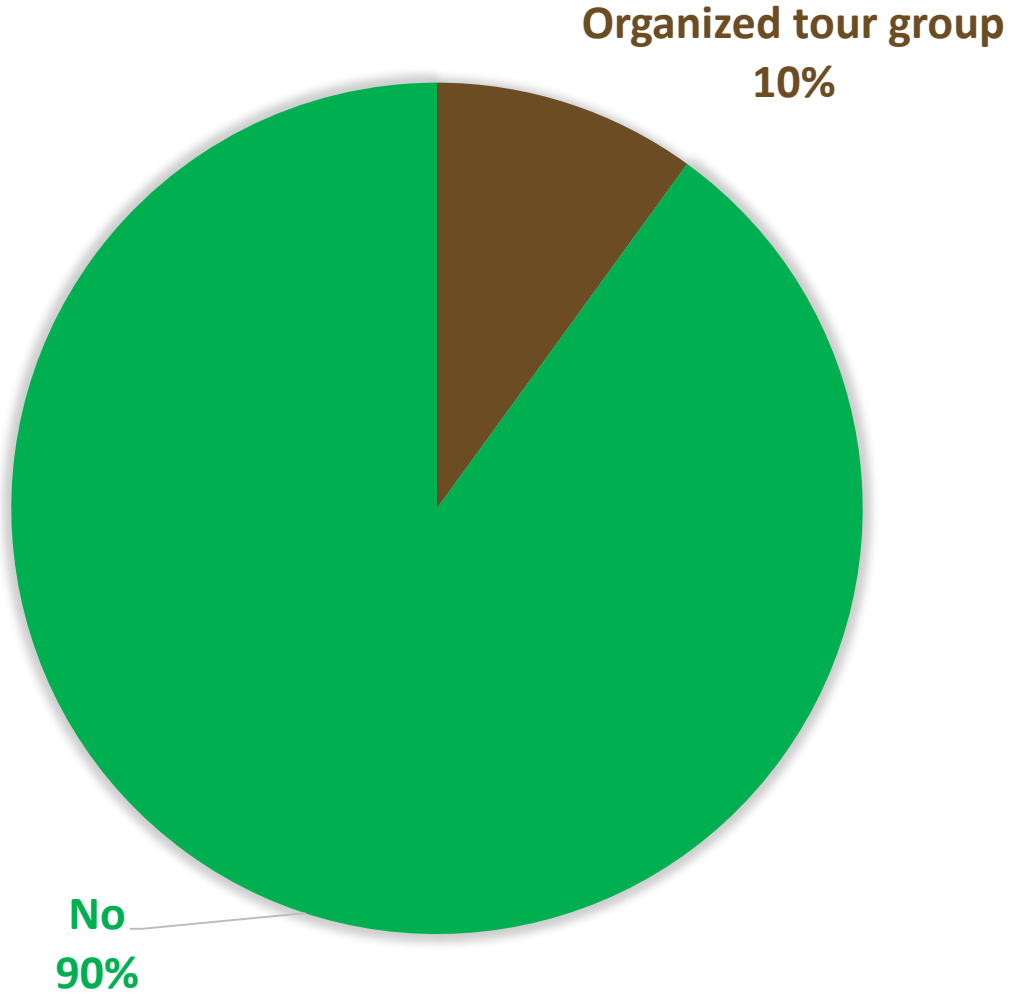




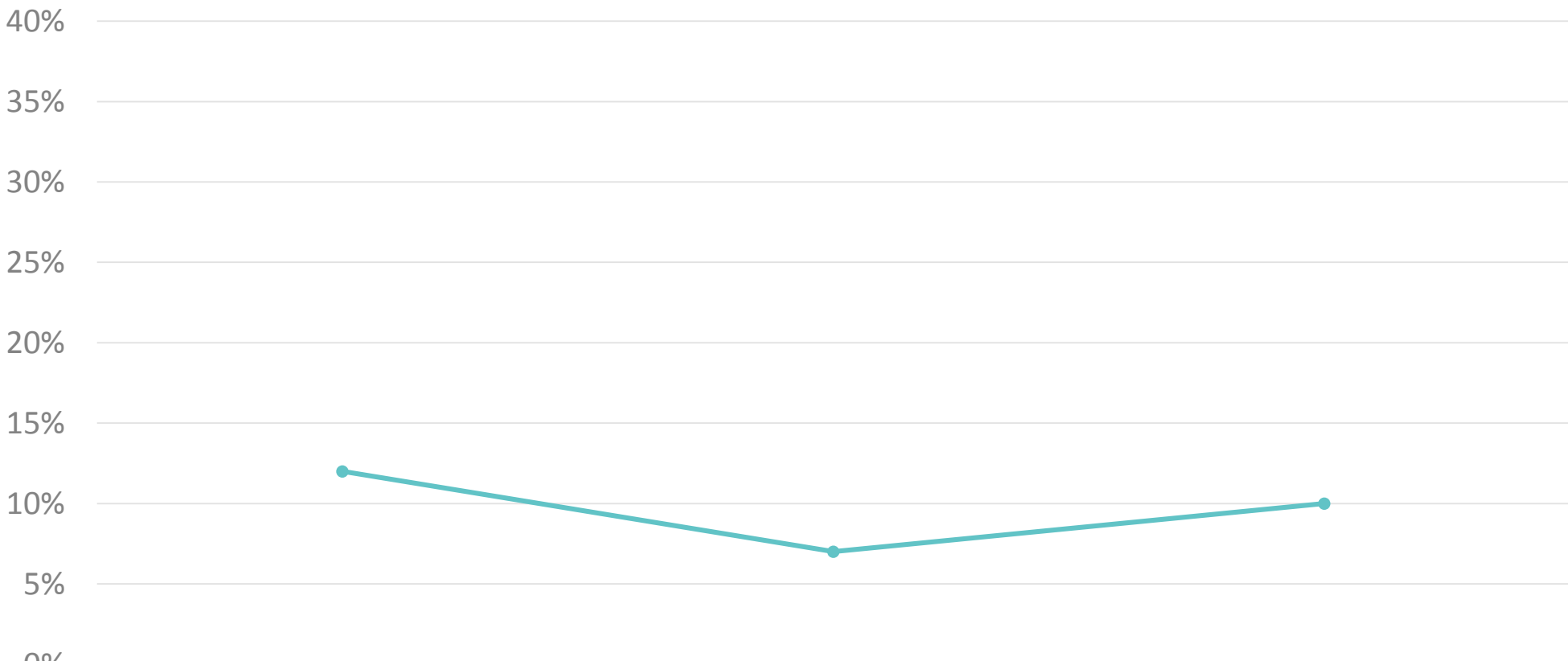
SECTION 2
TRAVEL PLANNING



ORGANIZED TOUR GROUP

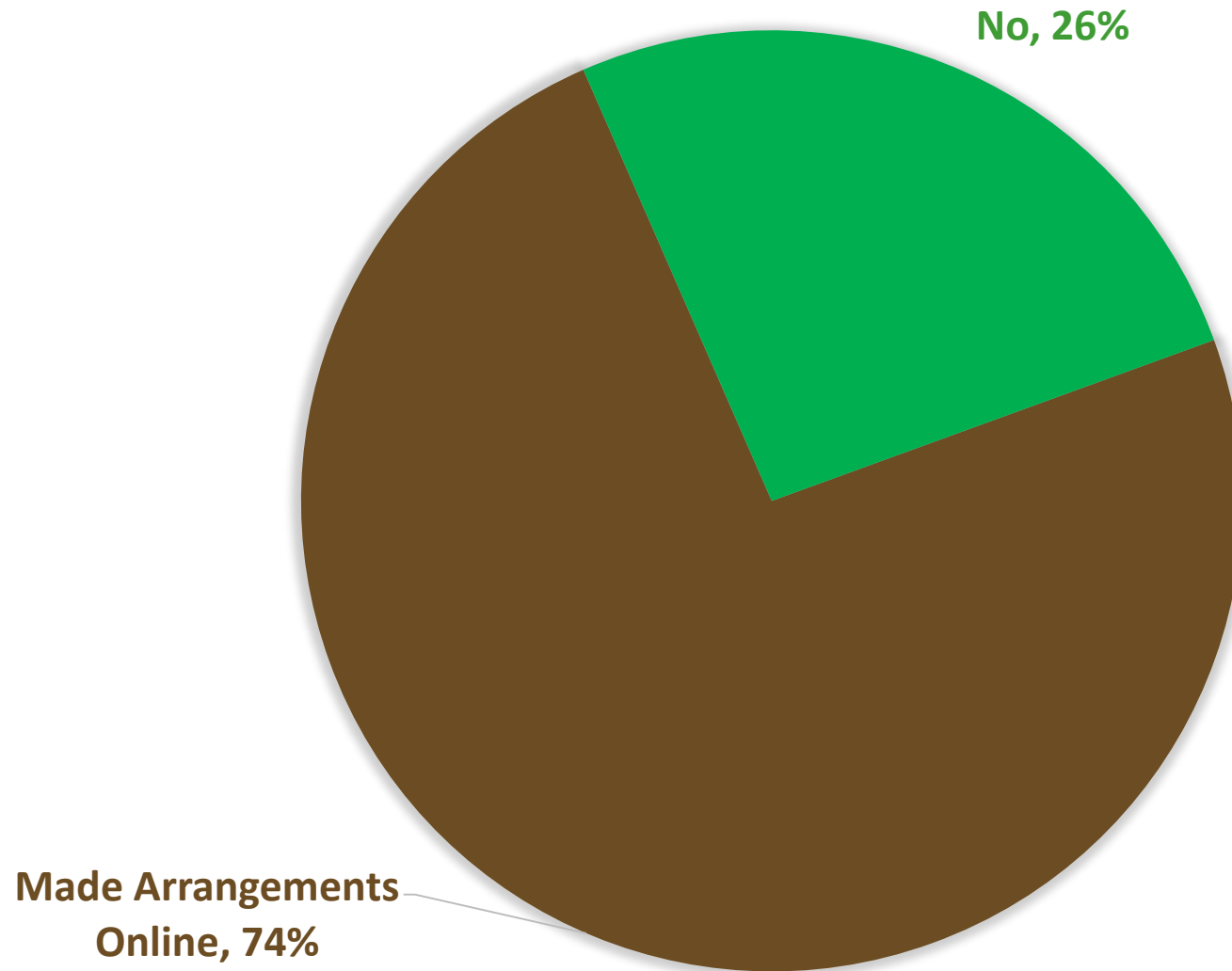


ORGANIZED TOUR GROUP – TRACKING



	FY2017	FY2018	FY2019
Organized Group Tour	12%	7%	10%

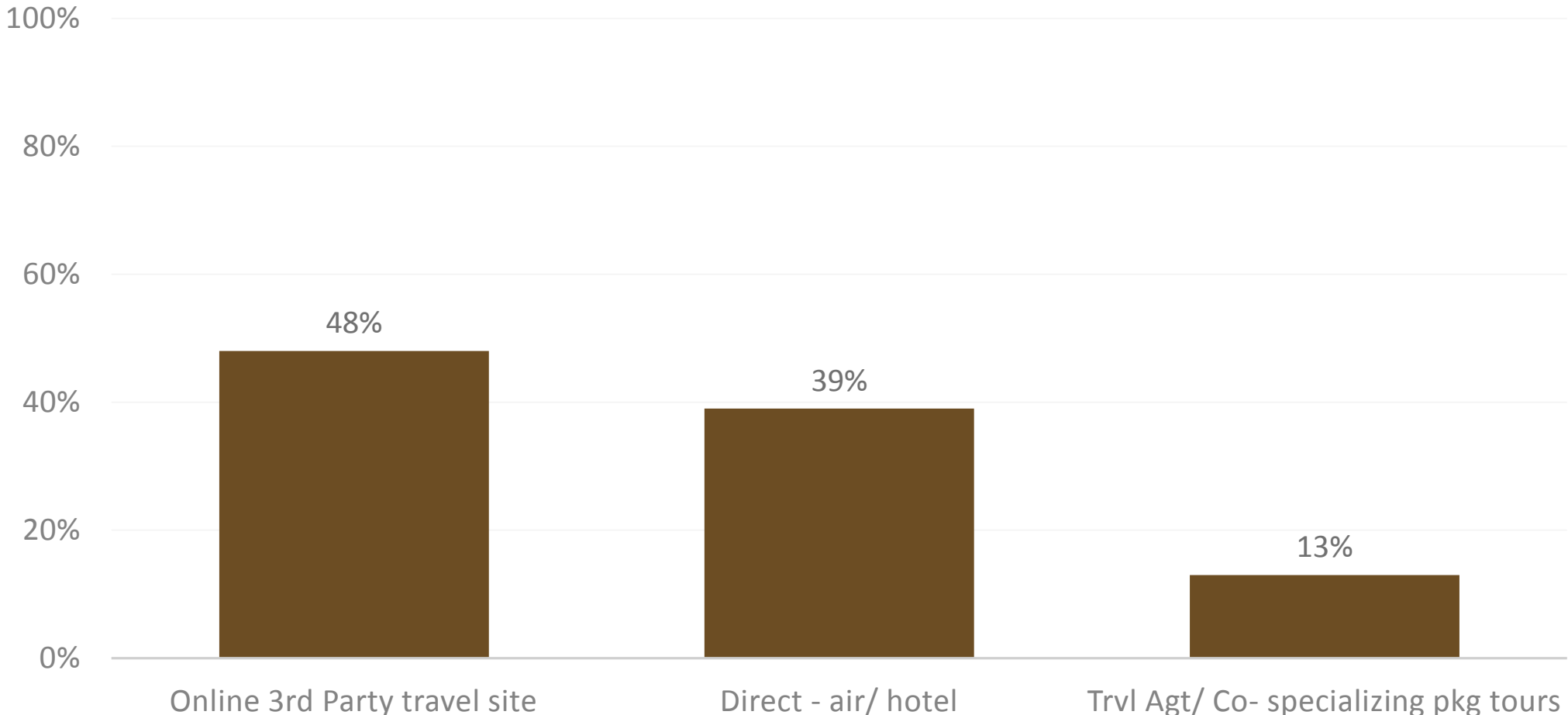
ONLINE BOOKING



ONLINE BOOKING – TRACKING



TRAVEL ARRANGEMENTS



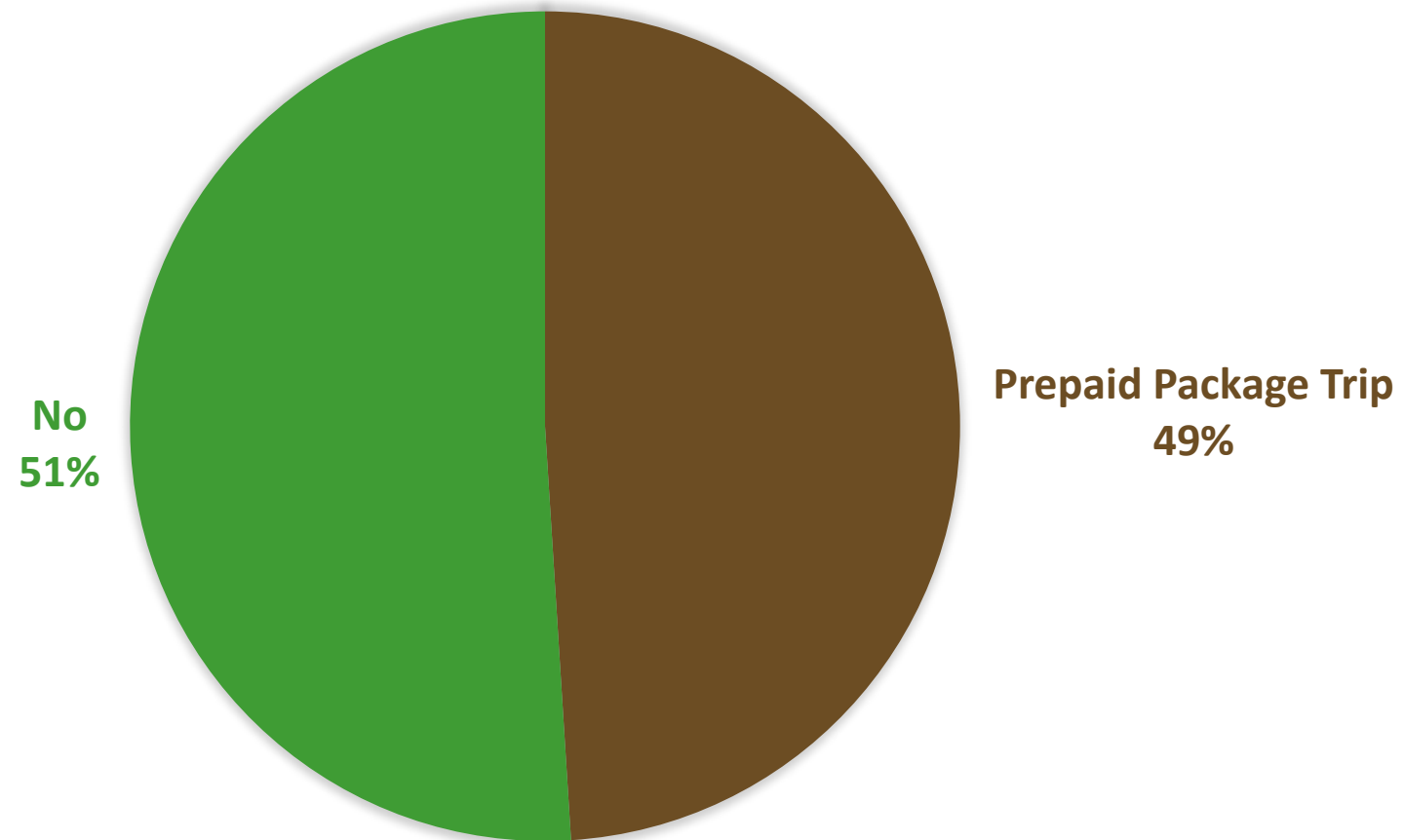
TRAVEL ARRANGEMENTS – TRACKING



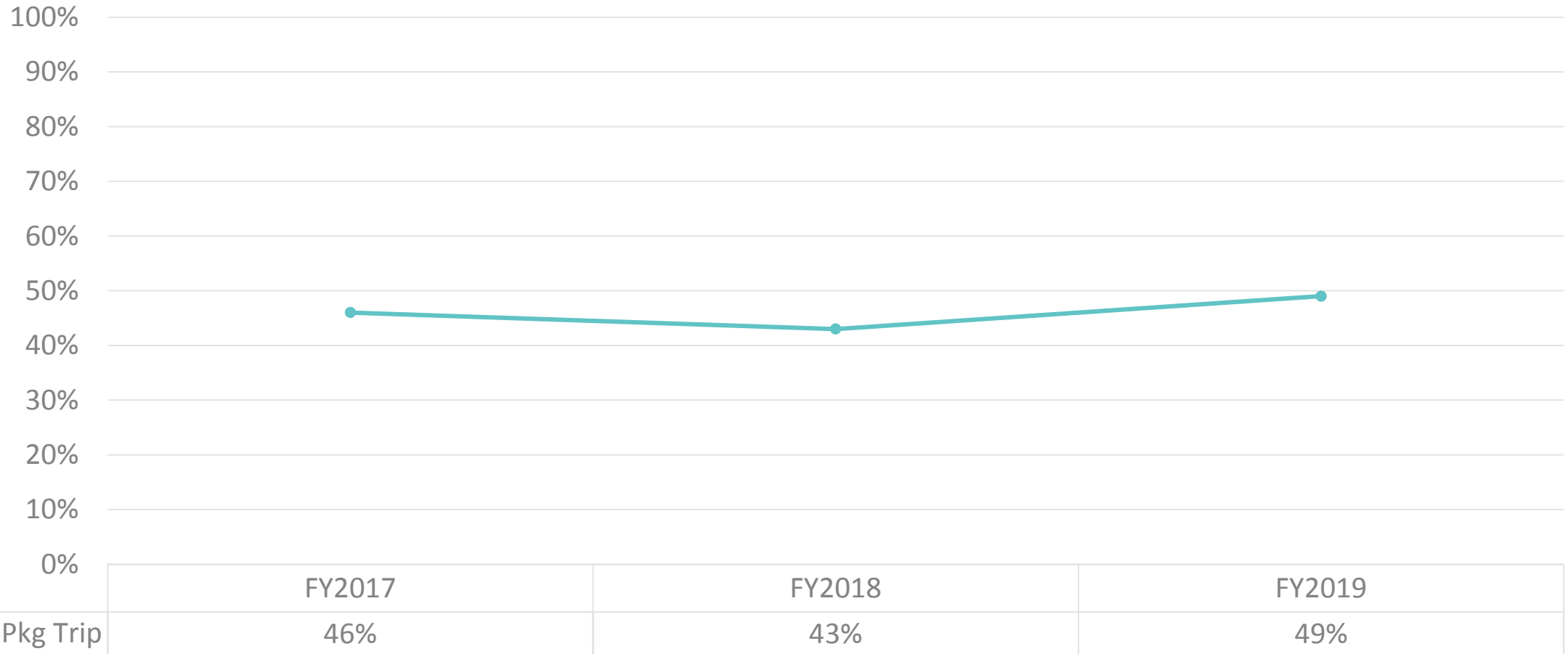
	FY2019	FY2020
Travel Website	48%	
Direct Booking	39%	
Travel Agent	13%	



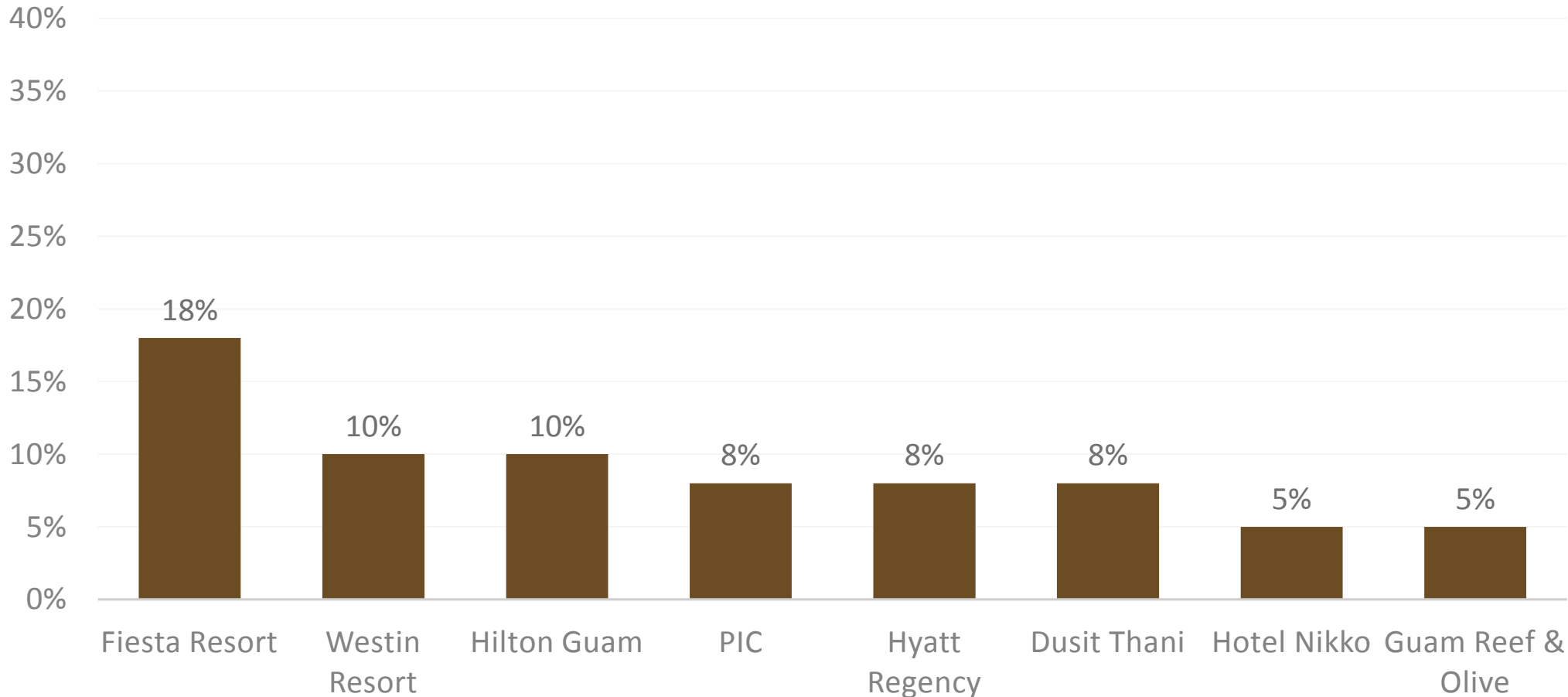
PREPAID PACKAGE TRIP



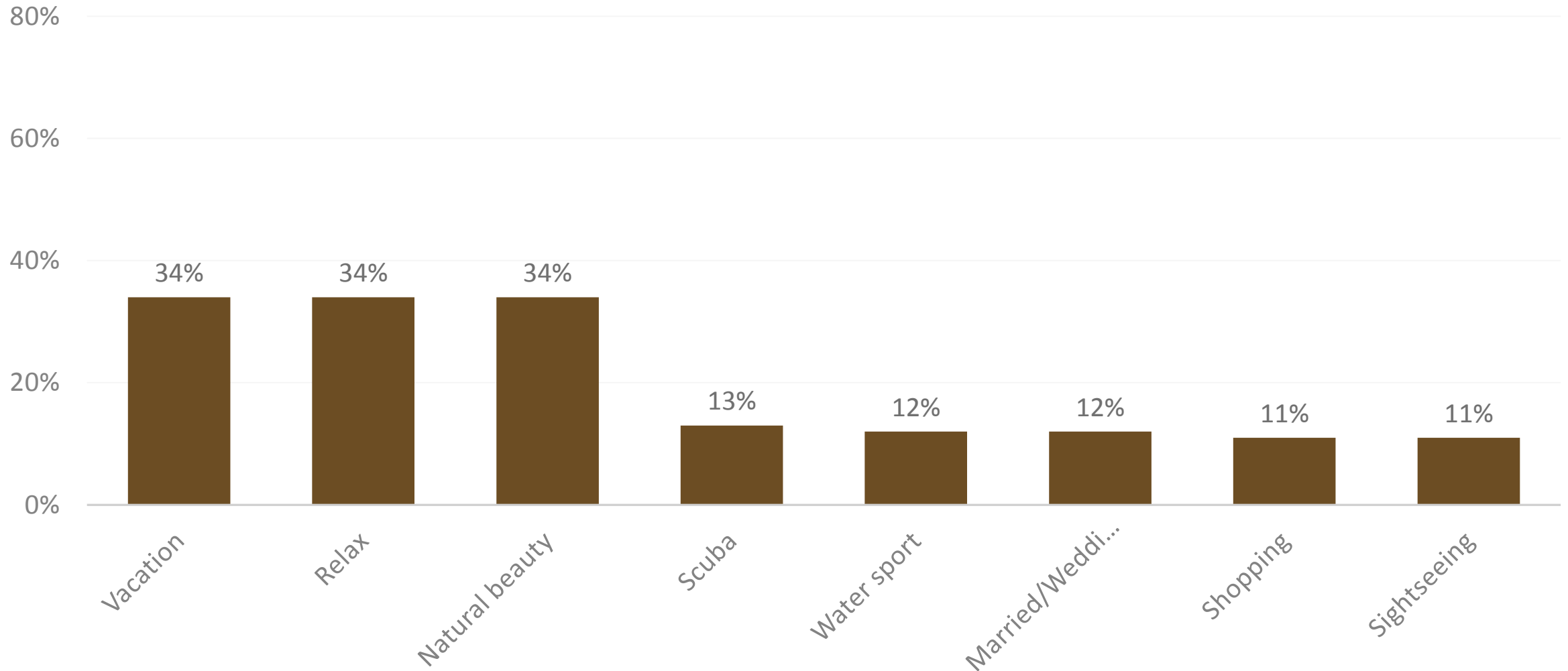
PREPAID PACKAGE TRIP



ACCOMMODATIONS (5%+)



TRAVEL MOTIVATIONS (10%+)



TRAVEL MOTIVATIONS – Top 3

FY2017	FY2018	FY2019
63% Natural beauty 30% Relax 25% Water sports	59% Natural beauty 27% Relax 17% Water Sports	34% Relax 34% Natural beauty 34% Vacation

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	Just to relax	34%	47%	31%	8%
	Beautiful seas, beaches, tropical climate	34%	27%	37%	25%
	Vacation	34%	35%	32%	8%
	Scuba diving	13%	5%	14%	33%
	Water sports (snorkeling, windsurfing, parasailing)	12%	10%	17%	8%
	To Get Married/ attend Wedding	12%	6%	13%	33%
	Sightseeing/ visiting tourist spots	11%	11%	13%	8%
	Shopping	11%	13%	10%	
	Recommendation of friend/ relative/ travel agency	9%	9%	9%	
	It is a safe place to spend a vacation	8%	6%	9%	
	A previous visit	6%	6%	8%	8%
	Short travel time (not too far from home)	5%	9%	5%	
	Career certification/ testing	5%	6%	4%	
	Organized sporting activity/ event	5%	7%	5%	
	Honeymoon	4%	3%	6%	100%
	Price of the tour package	3%	1%	5%	
	Company/ business trip	3%	3%		
	Adventure	2%	3%	1%	
	To visit friends or relatives	2%	3%	3%	
	Social Media networks	1%		1%	8%
	Convention/ conference/ trade show/ meeting	1%	1%		
	Incentive trip	1%			
	Shop Guam e-Festival	1%	1%	1%	
	Travel shows/ agents	1%			
	Medical	0%			
	Magazines/ newspapers/ publications	0%			
	Total	317	116	175	12

Prepared by Anthology Research





SECTION 3

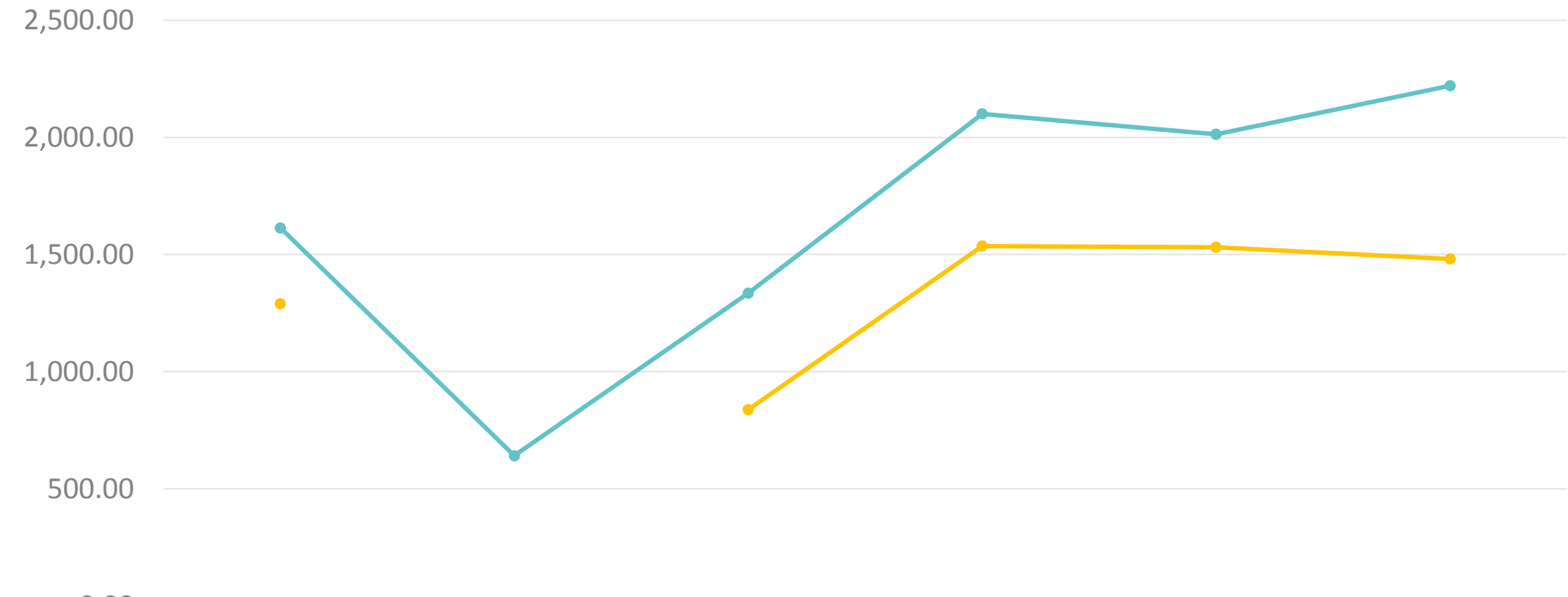
EXPENDITURES



PREPAID PACKAGE EXPENDITURES

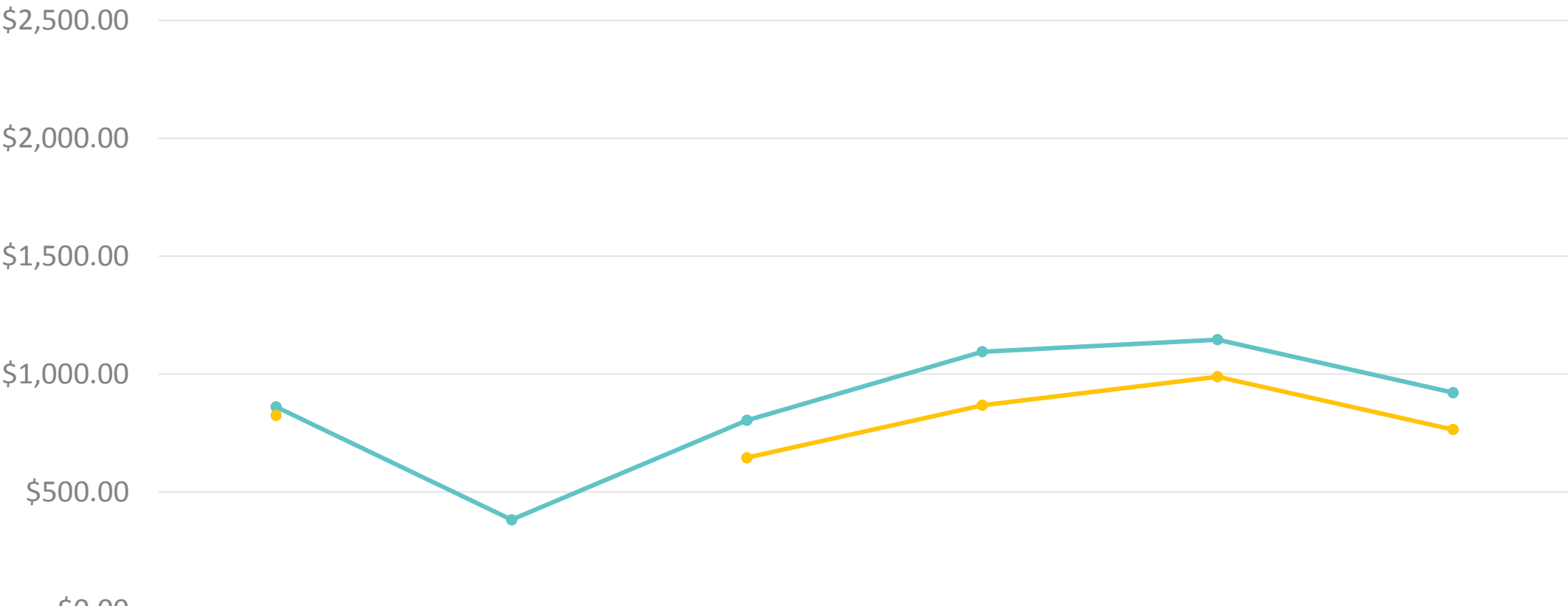
- \$2,220.90 = overall mean average prepaid package expense (for entire travel party) by respondent
- \$921.49 = overall mean average **per person** prepaid package expenditures

PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING



	FY2012	FY2013	FY2014	FY2017	FY2018	FY2019
MEAN	1,613.90	641.07	1,335.21	2,100.70	2,013.56	2,220.90
MEDIAN	1,290.00		838.00	\$1,536.00	1,531.00	1,481.00

PREPAID PACKAGE – PER PERSON EXPENSE TRACKING



	FY2012	FY2013	FY2014	FY2017	FY2018	FY2019
MEAN	\$860.70	\$382.10	\$803.91	\$1,095.14	\$1,146.11	\$921.49
MEDIAN	\$825.00		\$645.00	\$868.00	\$989.00	\$765.00

PREPAID PACKAGE – PER PERSON EXPENSE SEGMENTATION

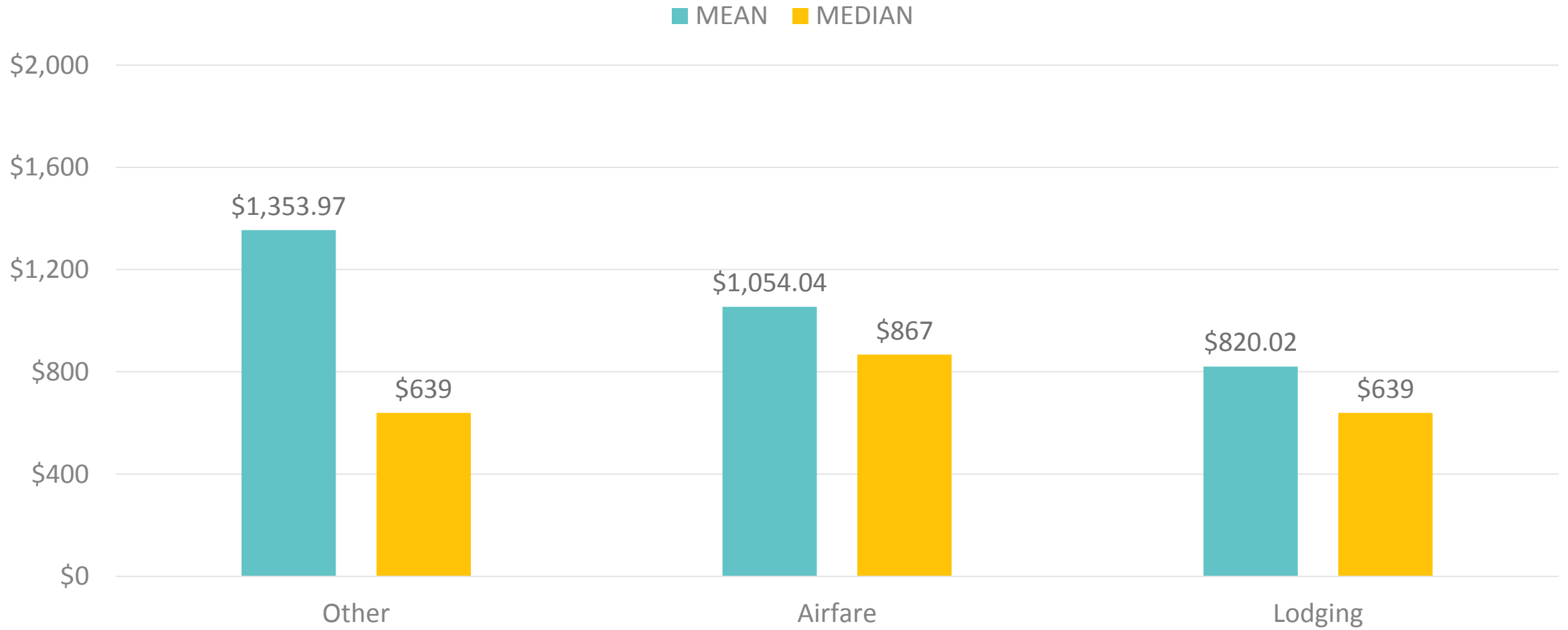
GVB VISITOR SATISFACTION STUDY

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

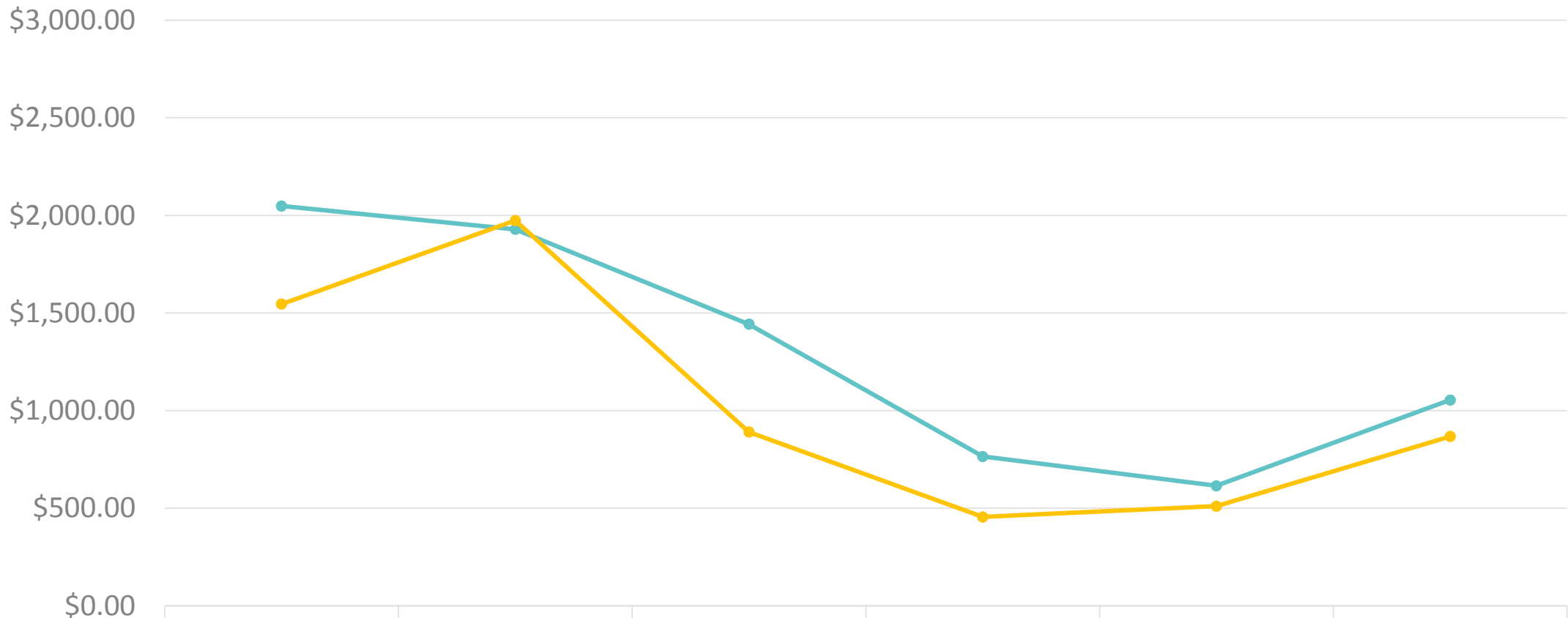
		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
PREPAID PKG TRAVEL PARTY	Mean	\$2,220.90	\$1,788.01	\$2,690.95	\$3,609.43
	Median	\$1,481	\$1,232	\$1,944	\$3,699

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PREPAID PACKAGE – BREAKDOWN

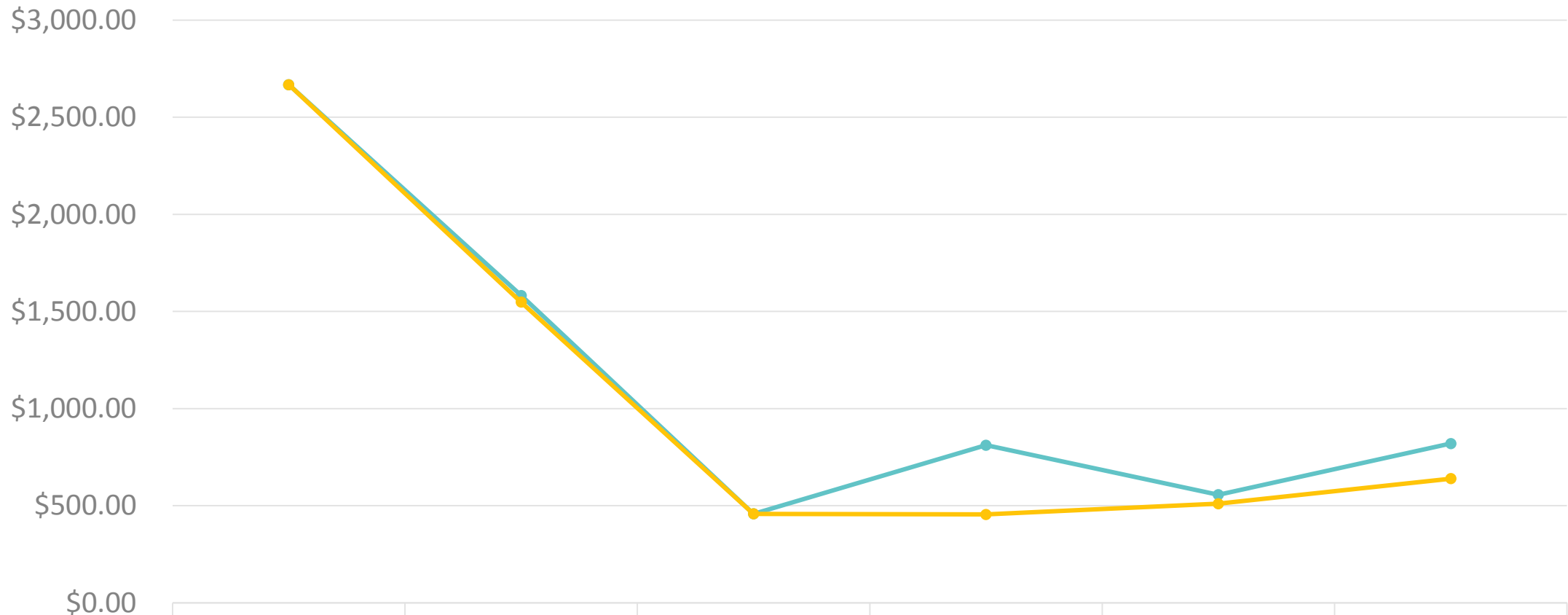


Prepaid-Tracking: Airfare



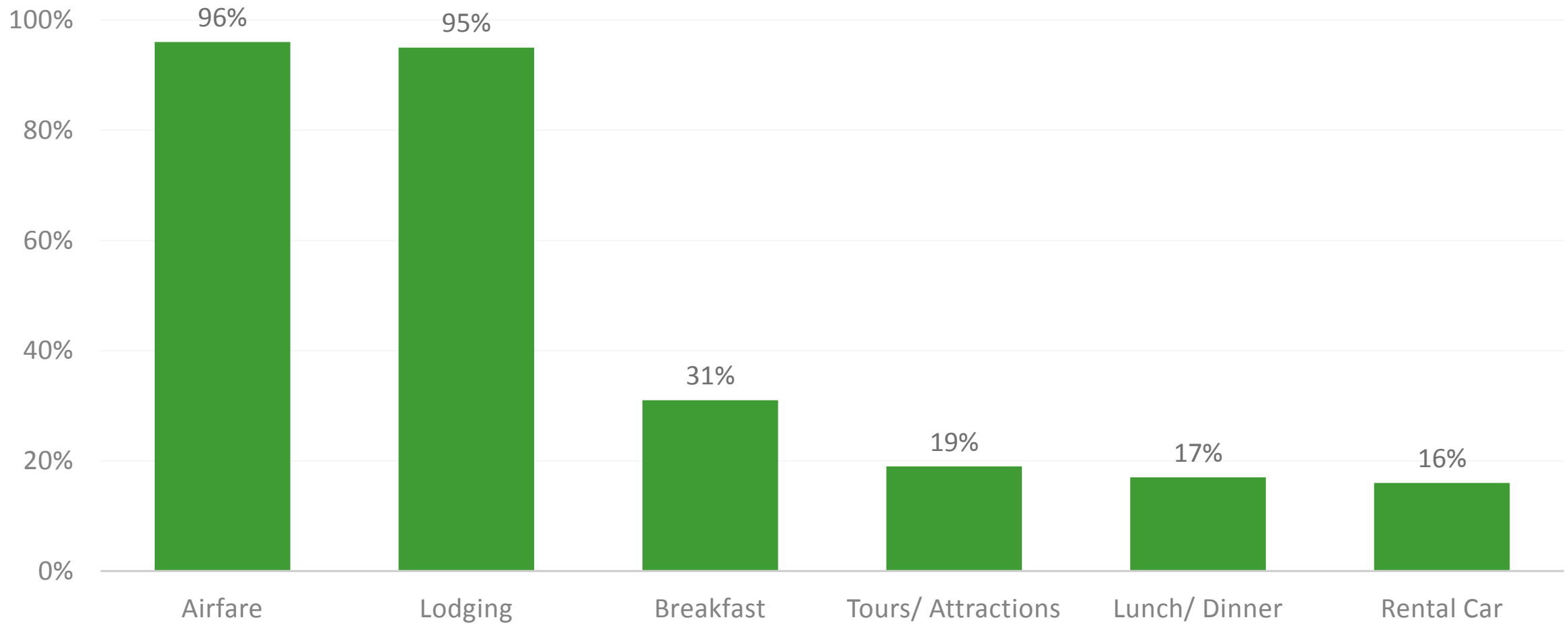
	FY2012	FY2013	FY2014	FY2017	FY2018	FY2019
MEAN	\$2,048.20	\$1,928.90	\$1,442.63	\$764.70	\$614.49	\$1,054.04
MEDIAN	\$1,546.00	\$1,974.00	\$890.00	\$455.00	\$510.00	\$867.00

Prepaid-Tracking: Accommodations



	FY2012	FY2013	FY2014	FY2017	FY2018	FY2019
MEAN	\$2,667.90	\$1,582.41	\$458.06	\$811.55	\$556.45	\$820.02
MEDIAN	\$2,668.00	\$1,548.00	\$458.00	\$455.00	\$510.00	\$639.00

PREPAID PACKAGE – BREAKDOWN



AIRFARE – FIT TRAVELER

- \$1,345.33 = overall mean average airfare expense (for entire travel party) by respondent
- \$666.94 = overall mean average **per person** airfare expenditures

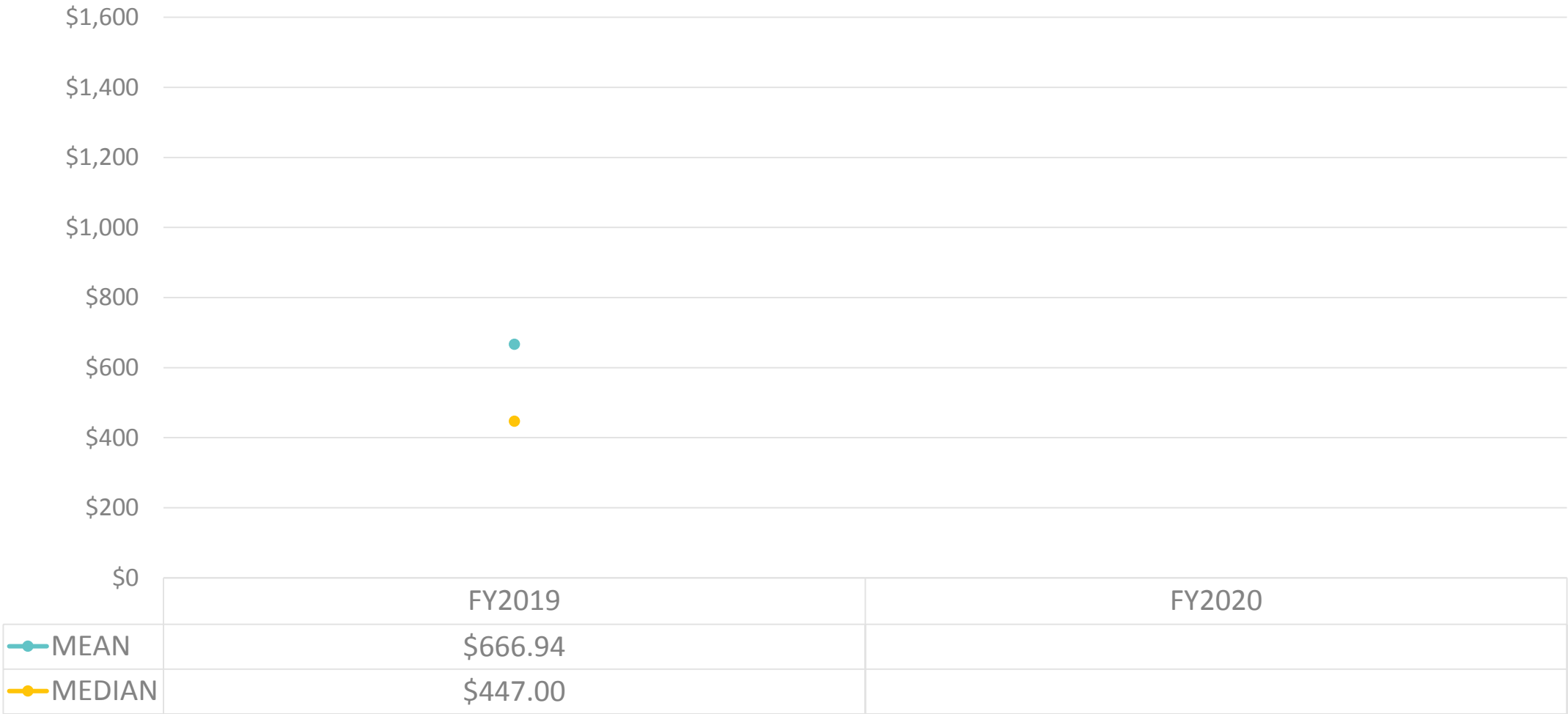
AIRFARE – FIT TRAVELER (GROUP) TRACKING



Q: How much of the total did you and your family/ travel party pay for the airline trip costs to Guam (if not included as part of a package)?



AIRFARE – FIT TRAVELER (Per Person) TRACKING



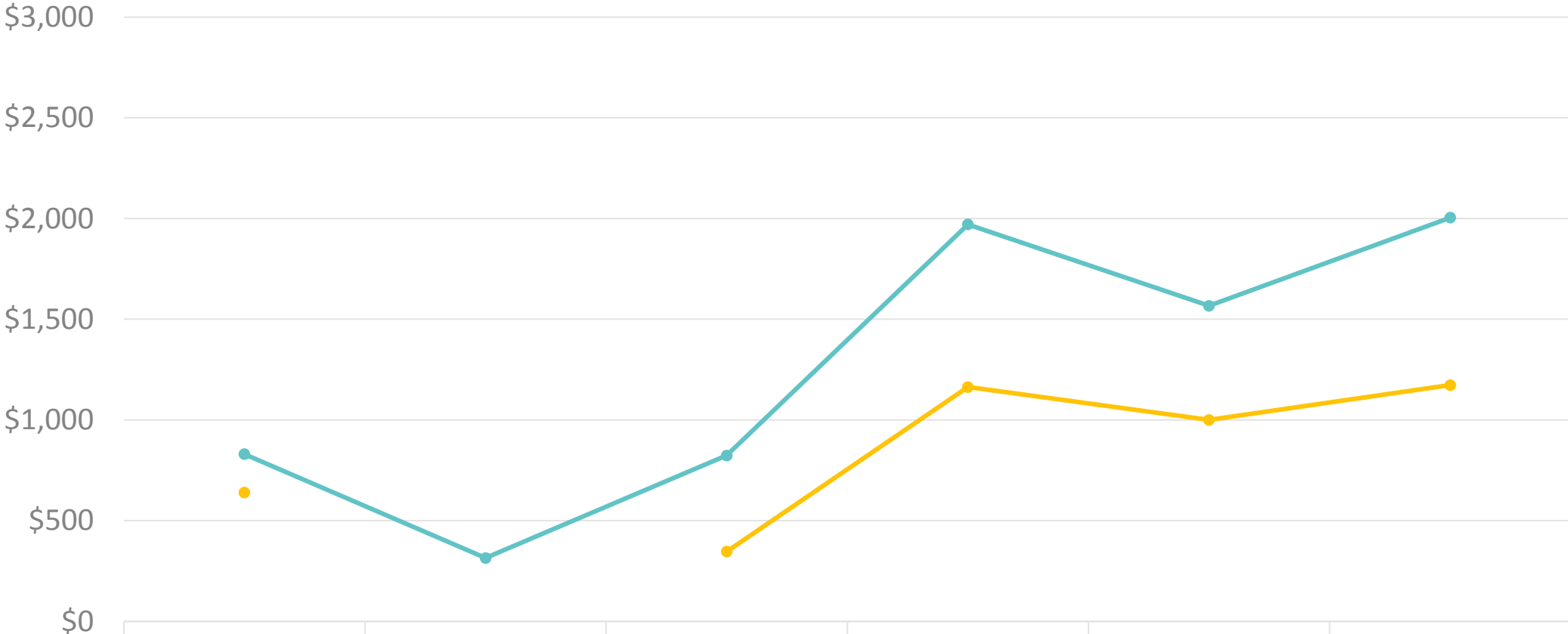
Q: How much of the total did you and your family/ travel party pay for the airline trip costs to Guam (if not included as part of a package)?



ONISLE EXPENDITURES

- \$2,004.25 = overall mean average expense (for entire travel party) by respondent
- \$901.13 = overall mean average **per person** expenditures

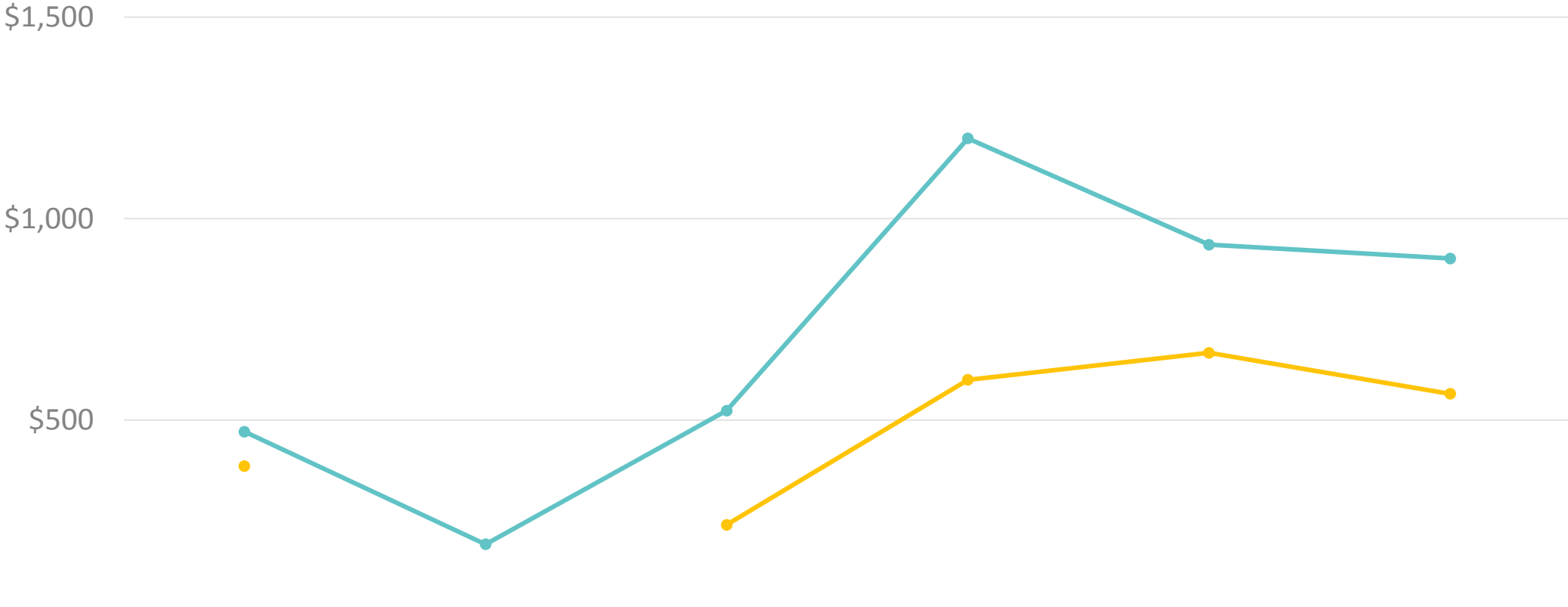
ONISLE – TRAVEL PARTY TRACKING



	FY2012	FY2013	FY2014	FY2017	FY2018	FY2019
MEAN	\$830.30	\$314.51	\$823.77	\$1,970.97	\$1,566.82	\$2,004.25
MEDIAN	\$640.00		\$346.00	\$1,163.00	\$1,000.00	\$1,173.00

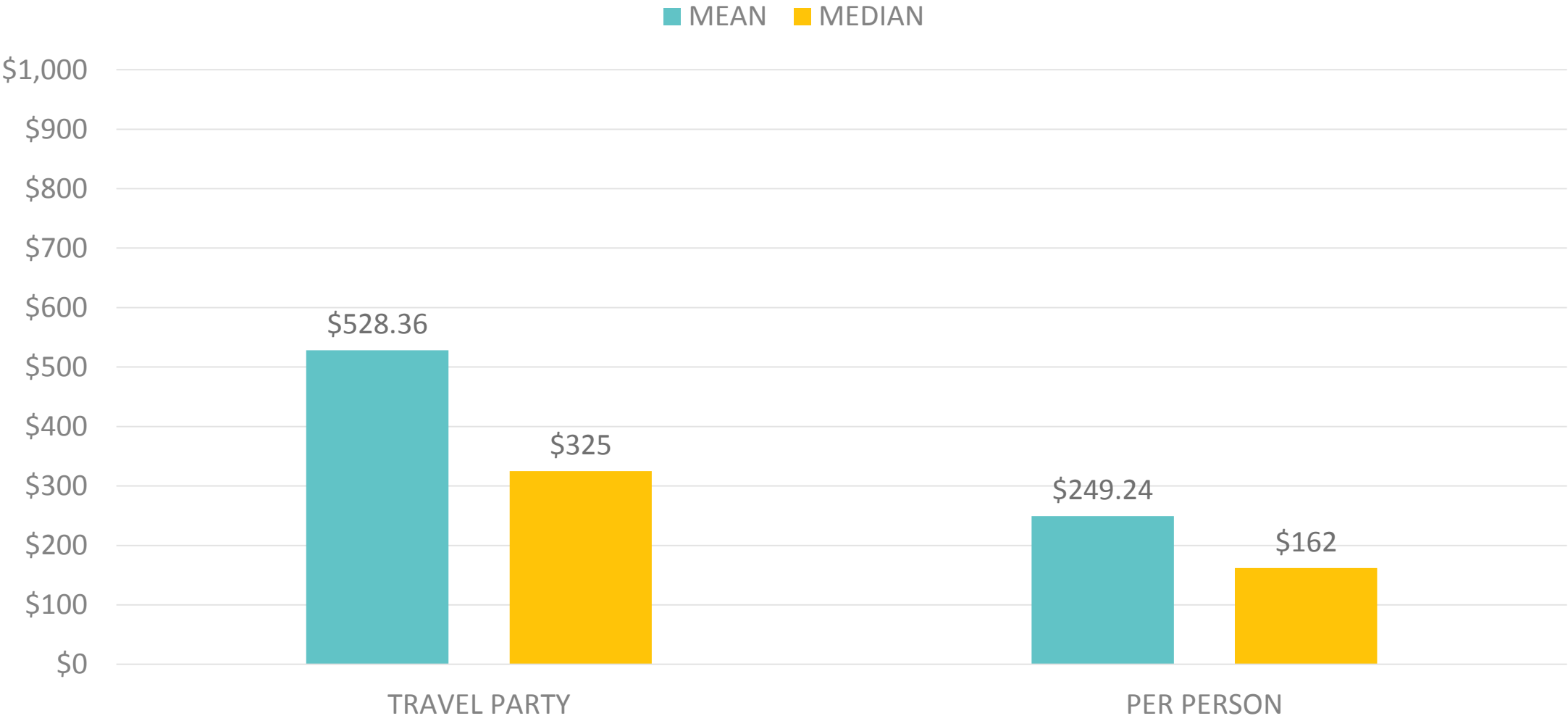


ONISLE – PER PERSON TRACKING

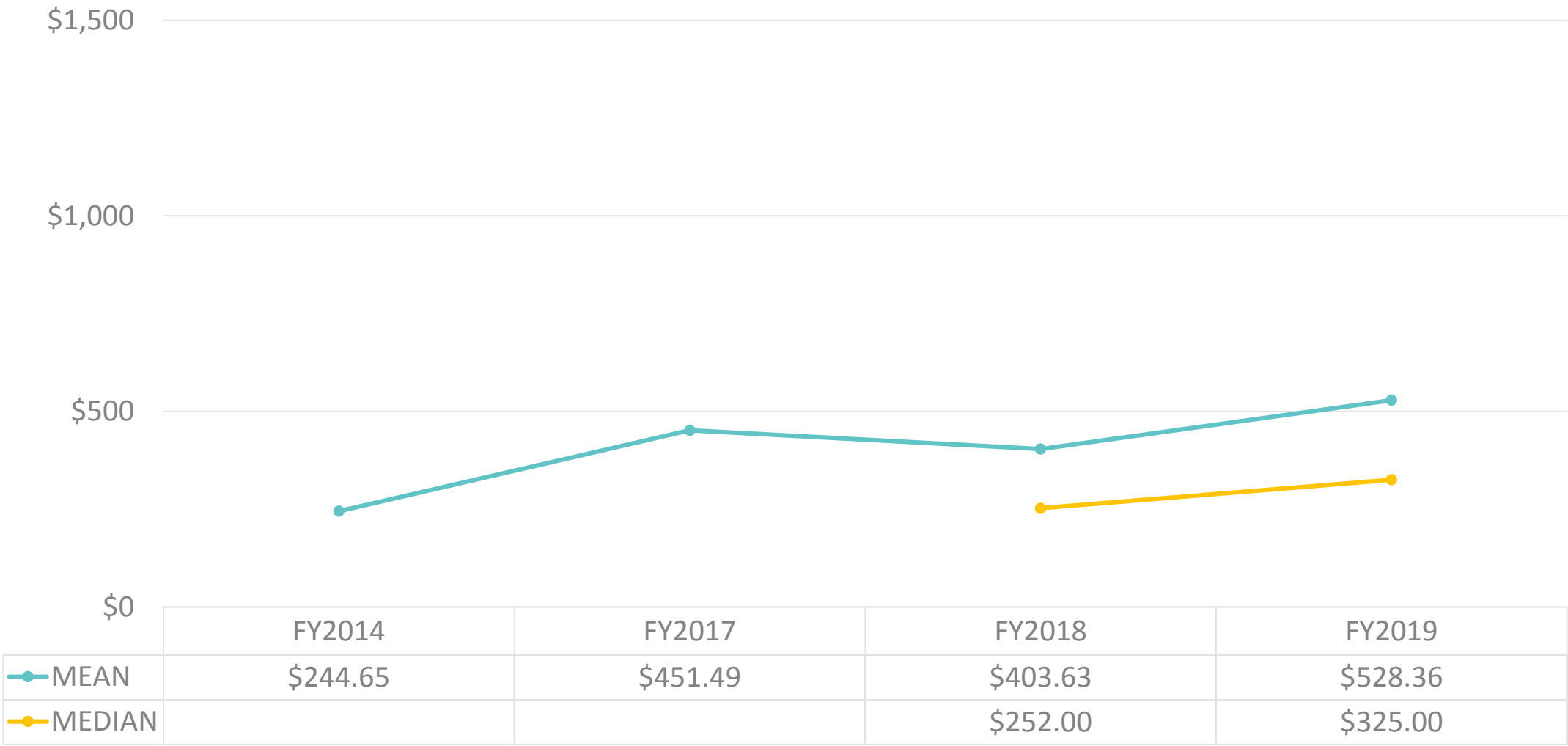


	FY2012	FY2013	FY2014	FY2017	FY2018	FY2019
MEAN	\$471.10	\$191.65	\$523.52	\$1,199.08	\$935.20	\$901.13
MEDIAN	\$386.00		\$240.00	\$600.00	\$667.00	\$565.00

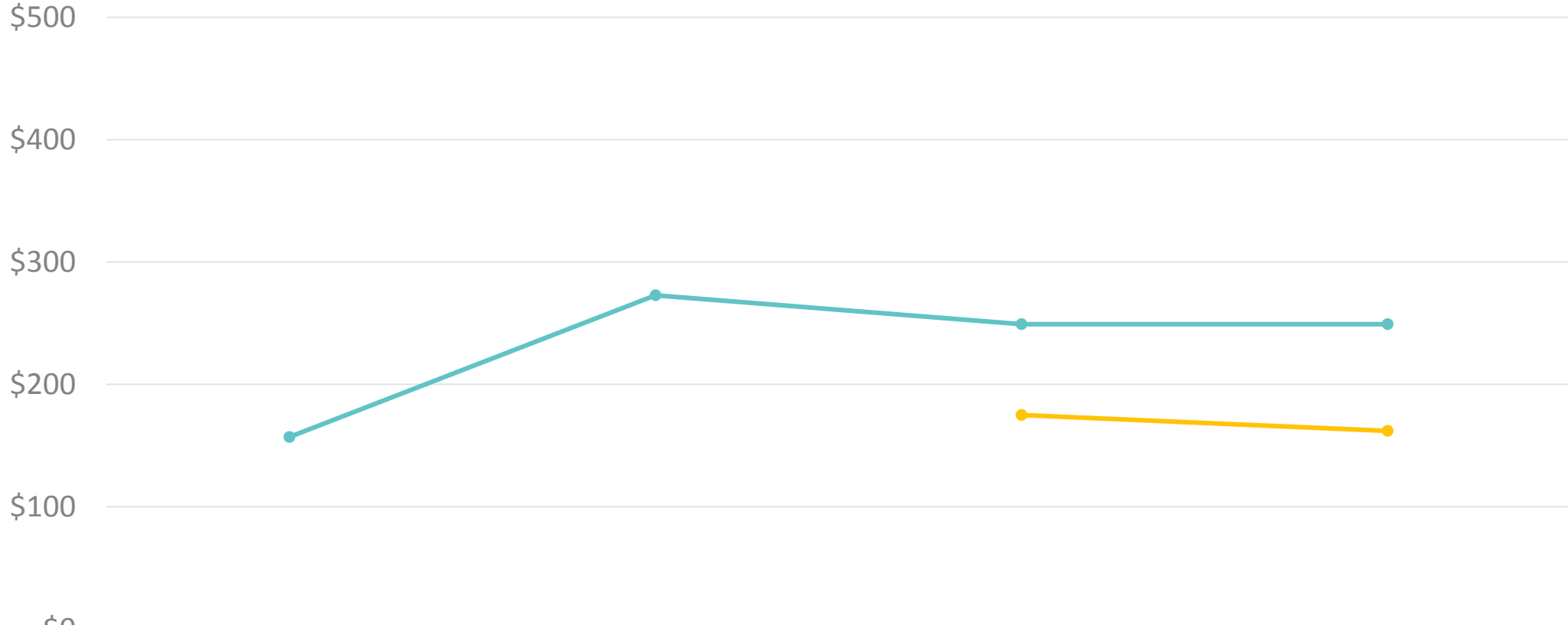
ONISLE – PER DAY SPENDING



ONISLE – TRAVEL PARTY/ PER DAY TRACKING



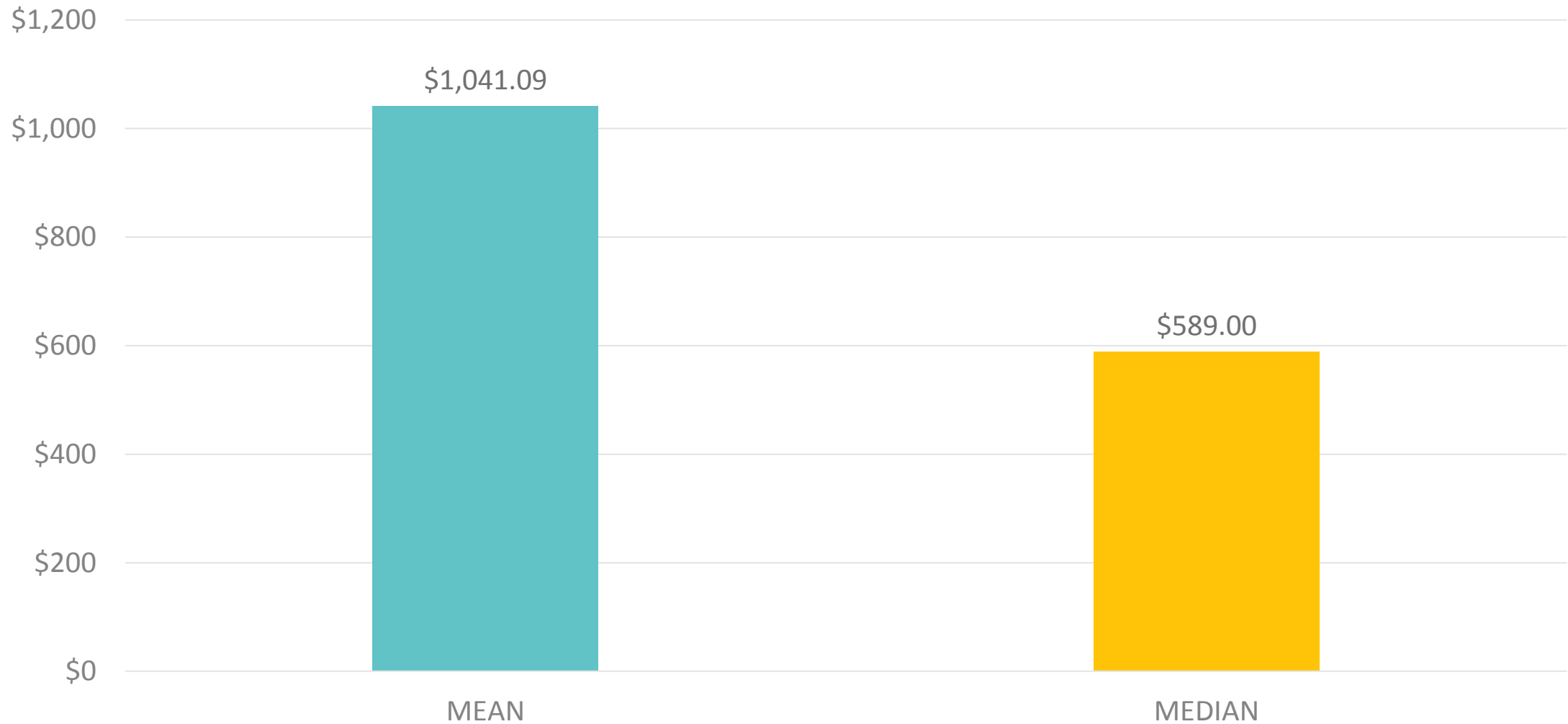
ONISLE – PER PERSON/ PER DAY TRACKING



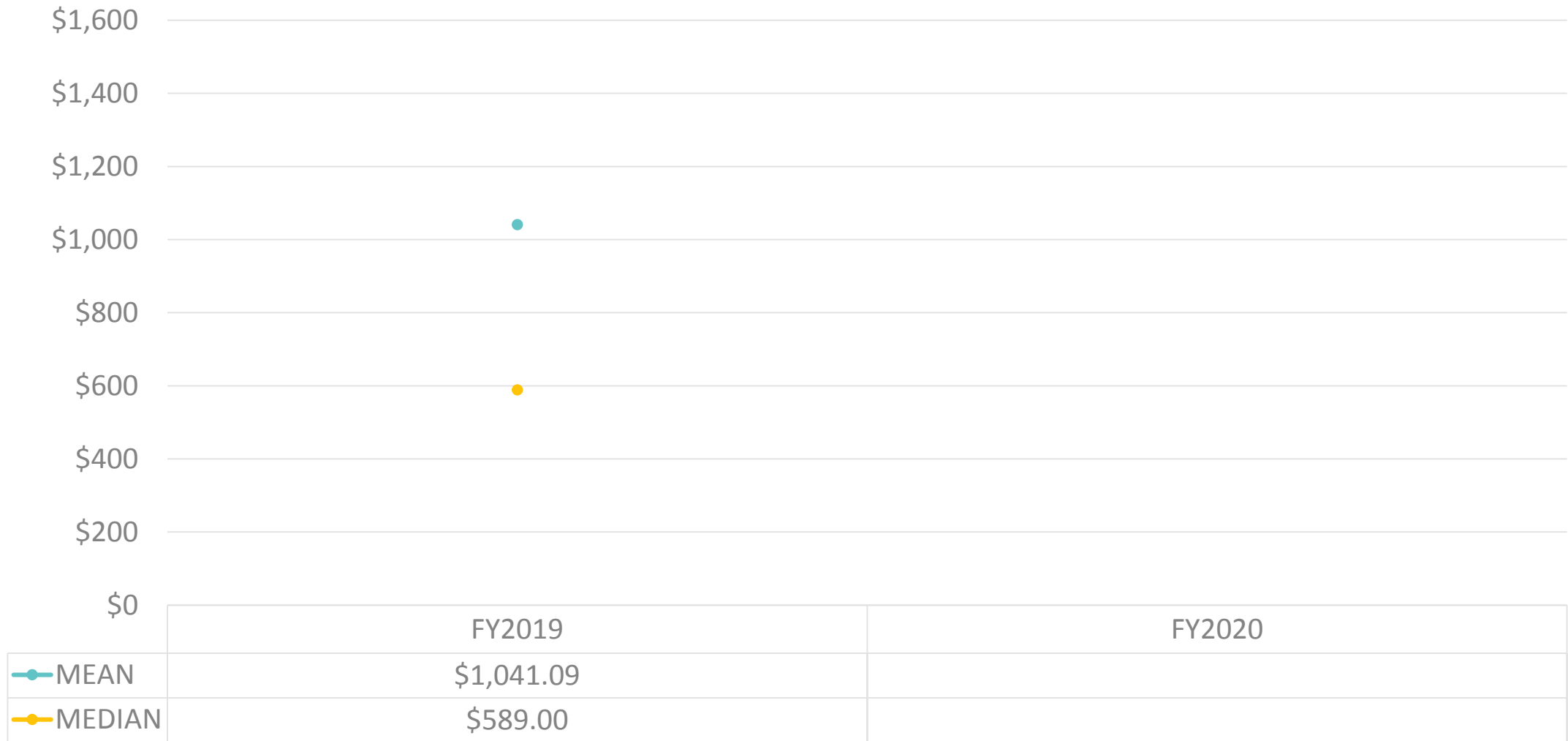
	FY2014	FY2017	FY2018	FY2019
MEAN	\$156.93	\$272.81	\$249.18	\$249.24
MEDIAN			\$175.00	\$162.00



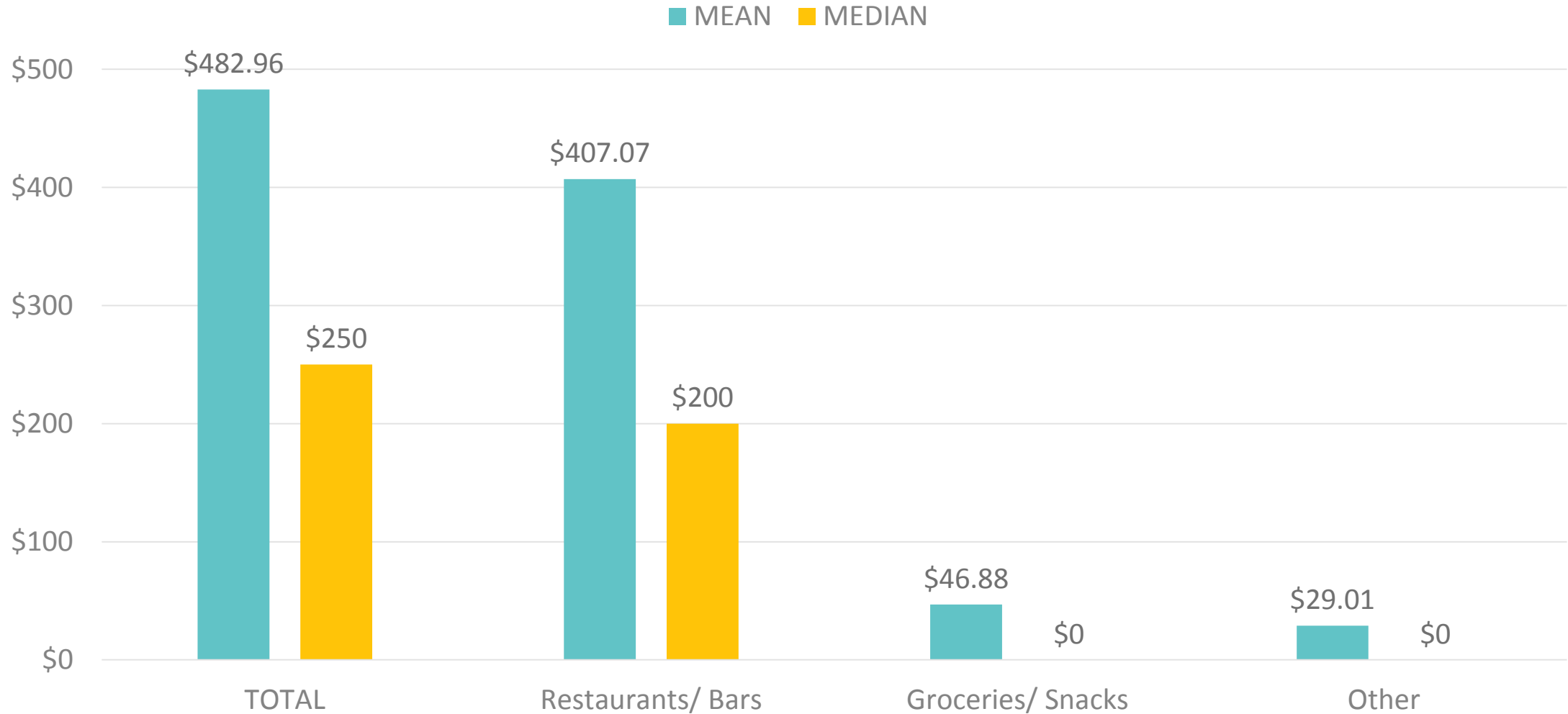
ONISLE – ACCOMMODATIONS



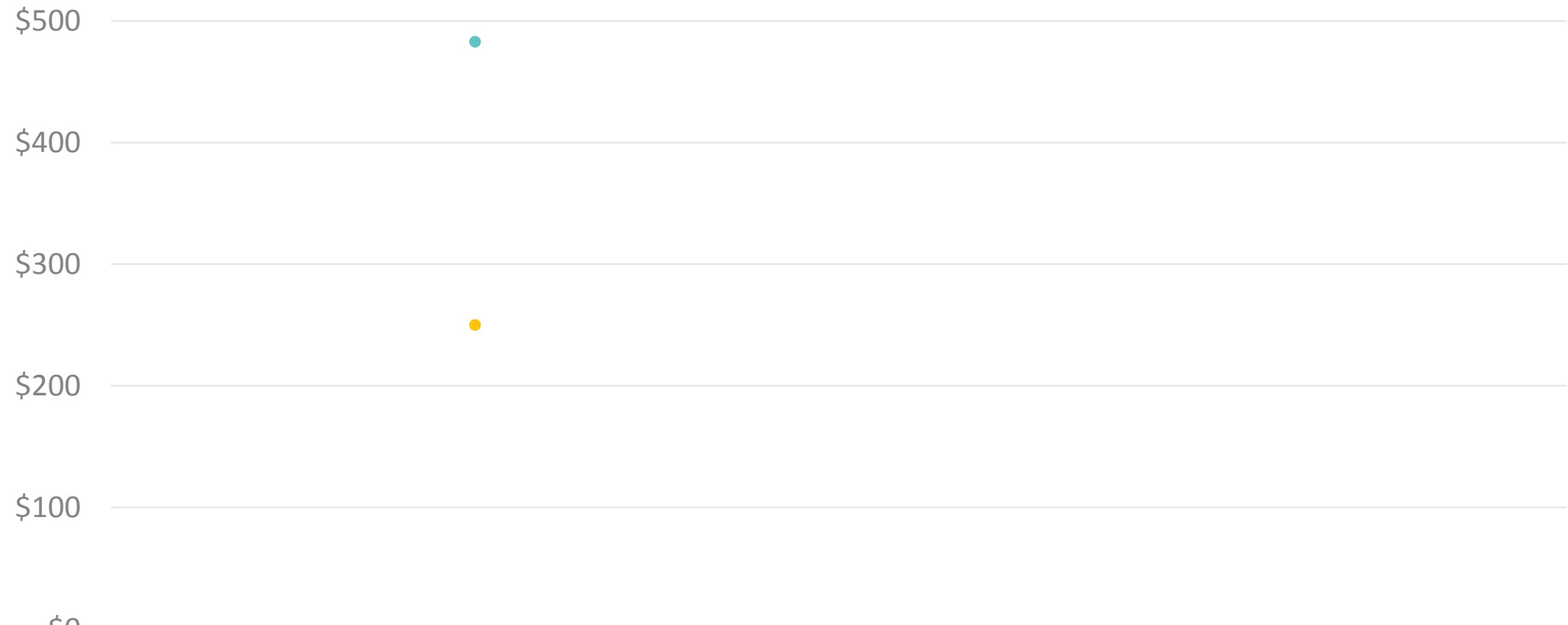
ONISLE – ACCOMMODATIONS TRACKING



ONISLE – FOOD & BEVERAGE



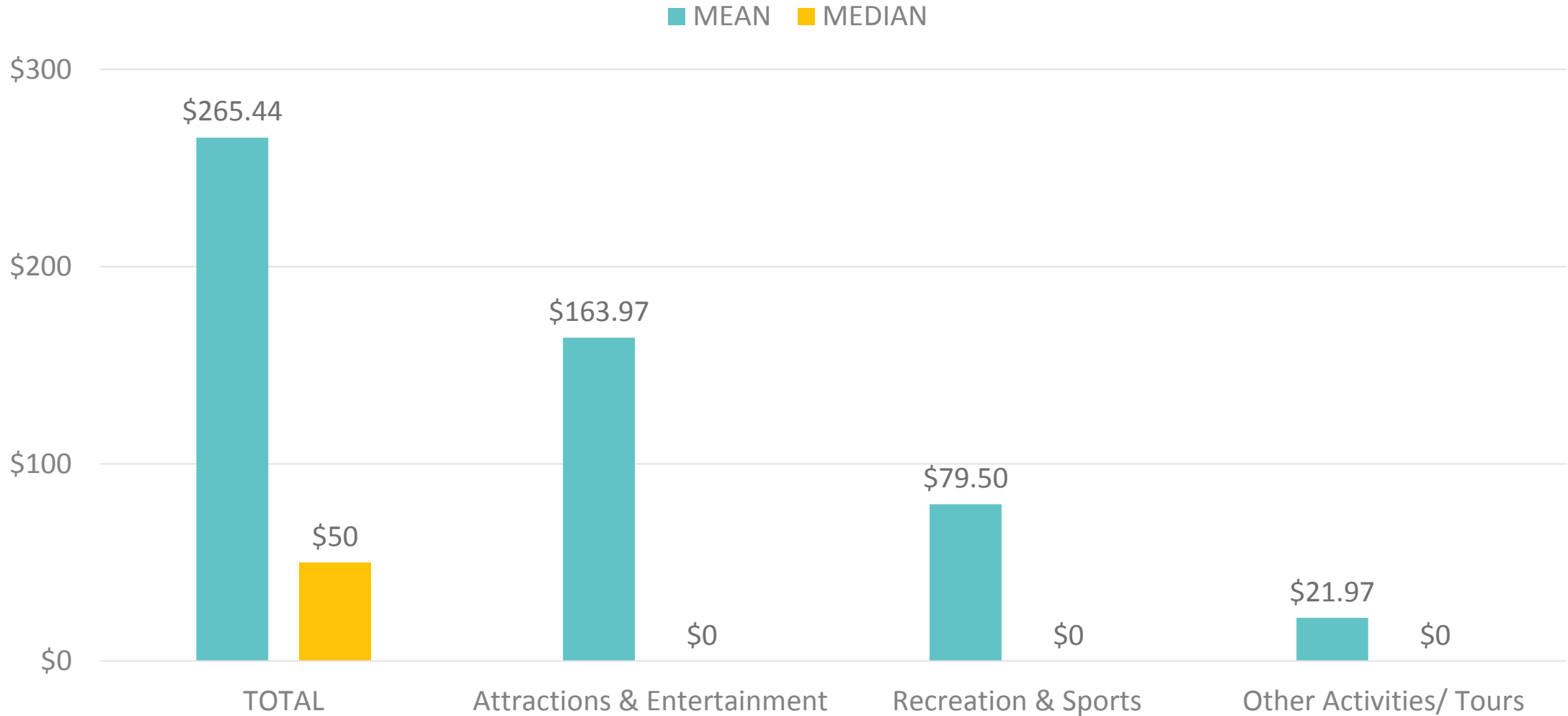
ONISLE – TOTAL FOOD & BEVERAGE TRACKING



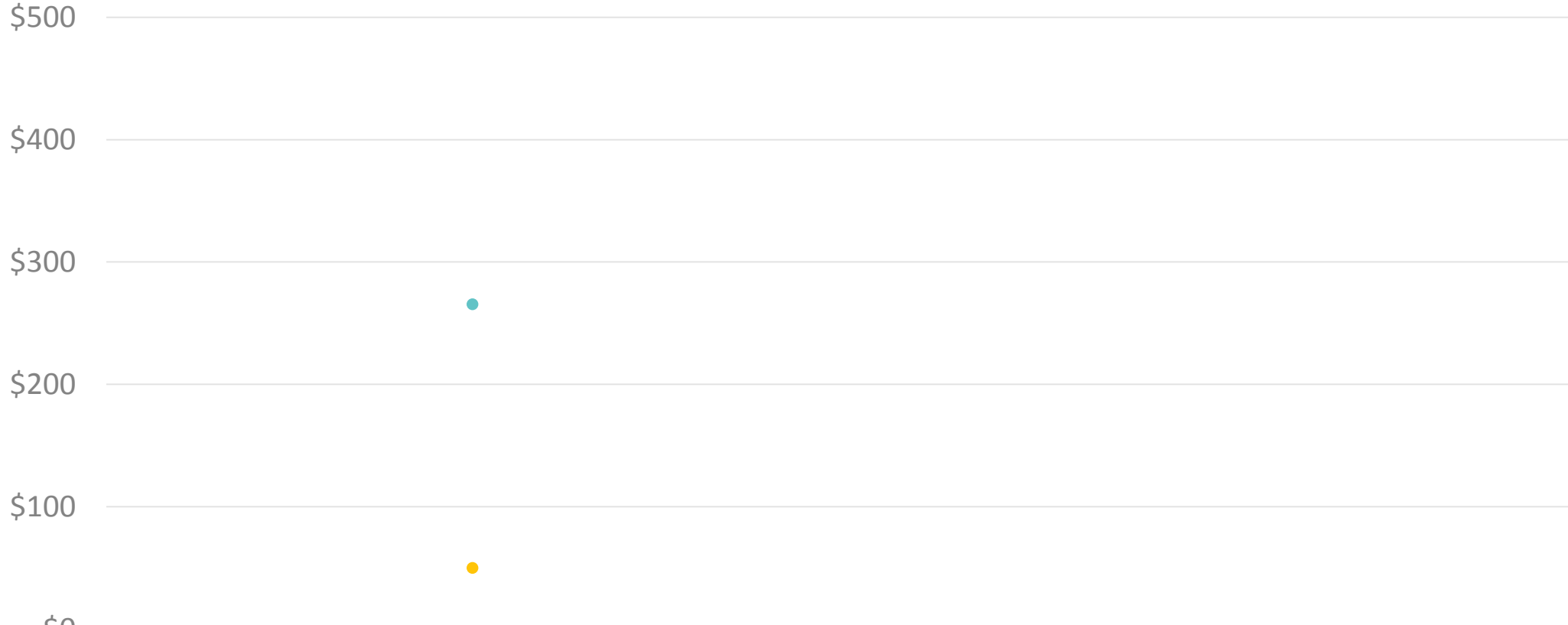
	FY2019	FY2020
MEAN	\$482.96	
MEDIAN	\$250.00	



ONISLE – ENTERTAINMENT & RECREATION



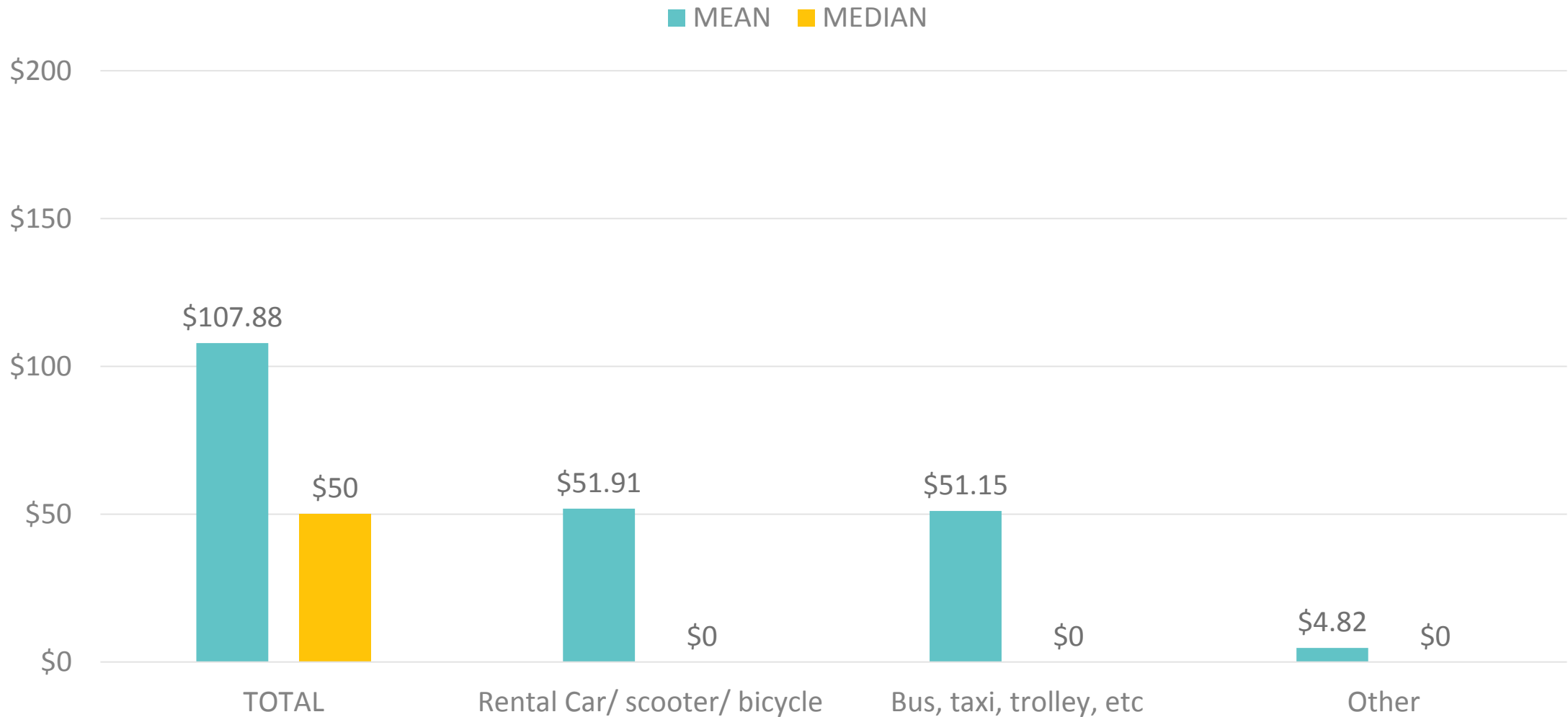
ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING



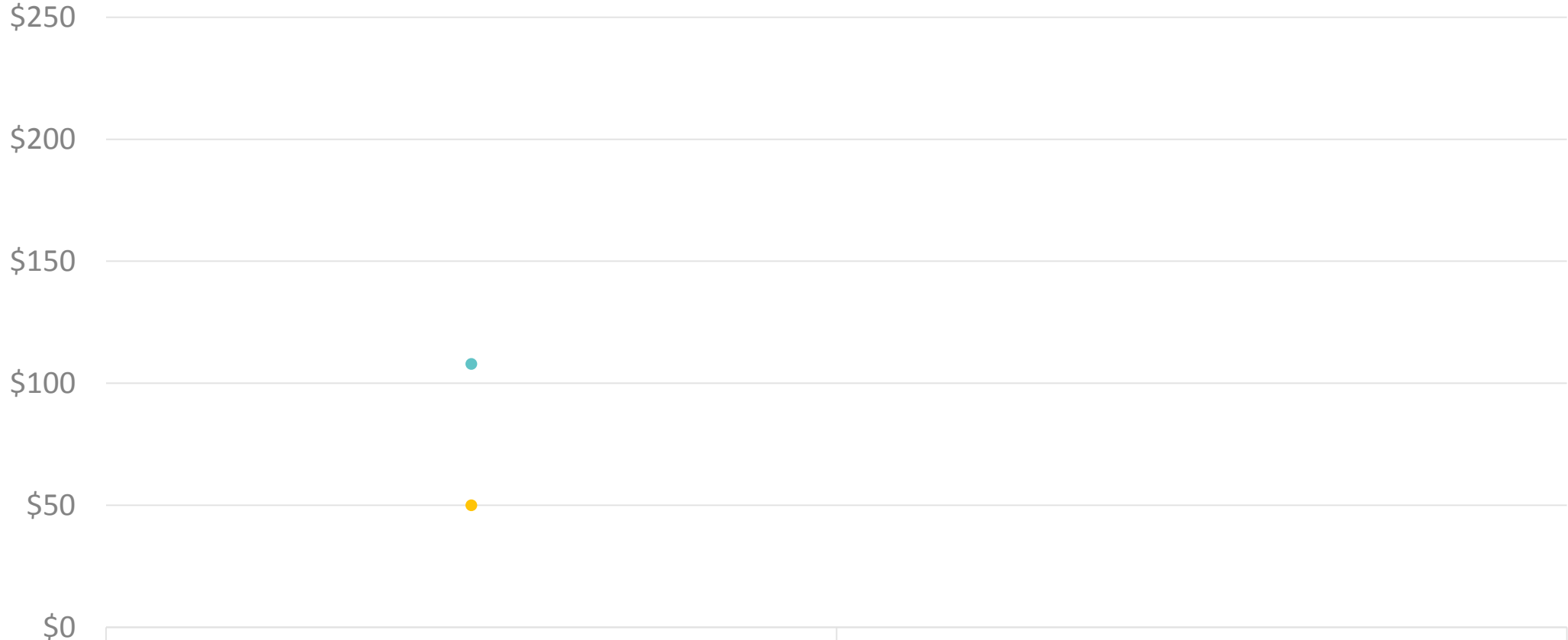
	FY2019	FY2020
MEAN	\$265.44	
MEDIAN	\$50.00	



ONISLE – TRANSPORTATION

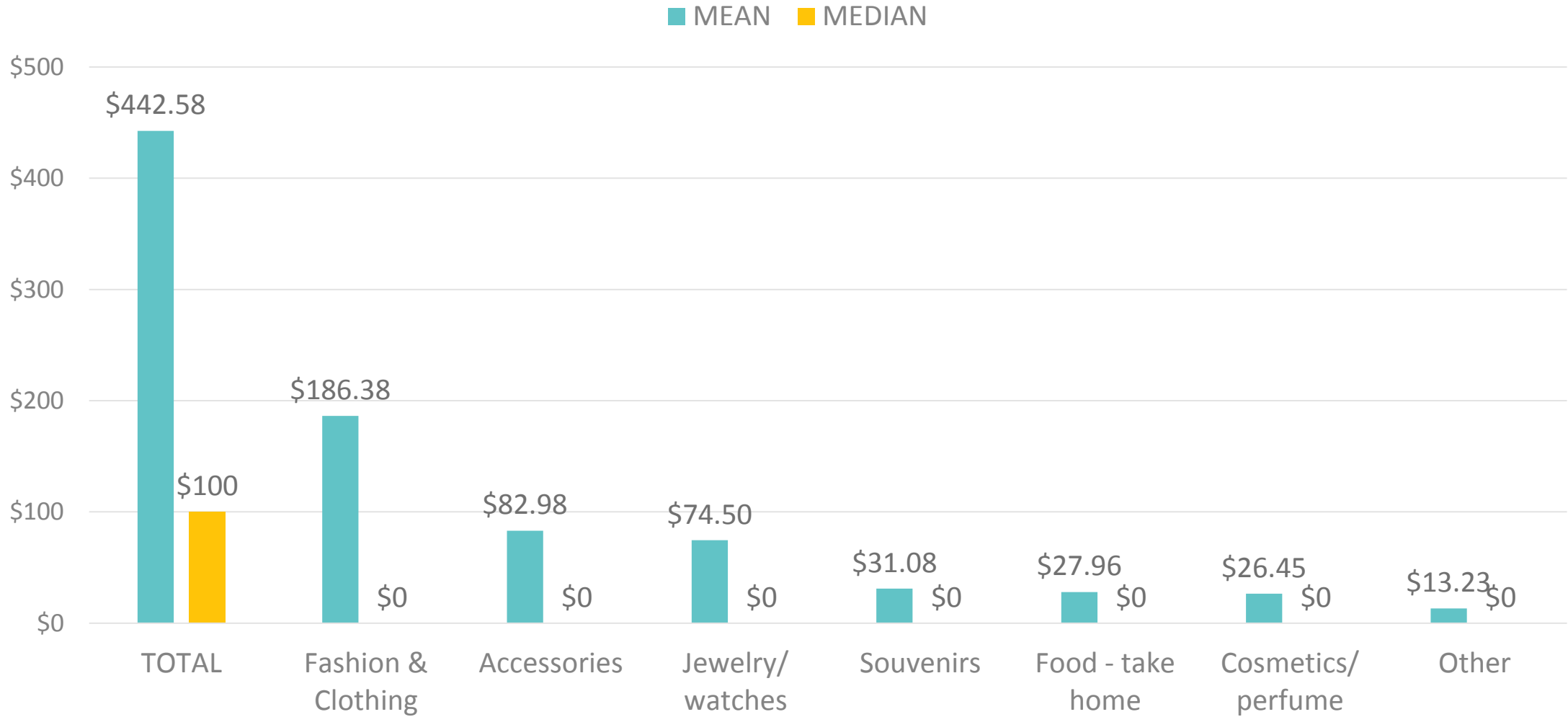


ONISLE – TOTAL TRANSPORTATION TRACKING

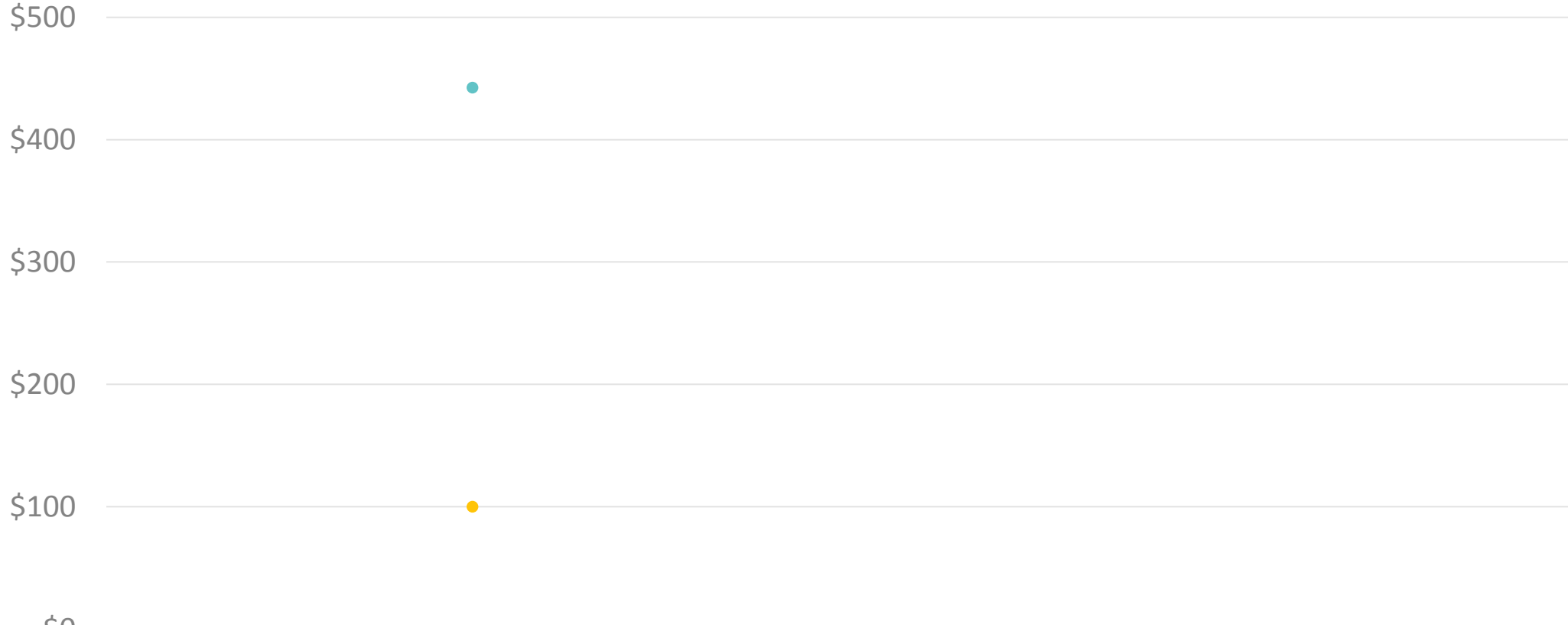


	FY2019	FY2020
MEAN	\$107.88	
MEDIAN	\$50.00	

ONISLE – SHOPPING

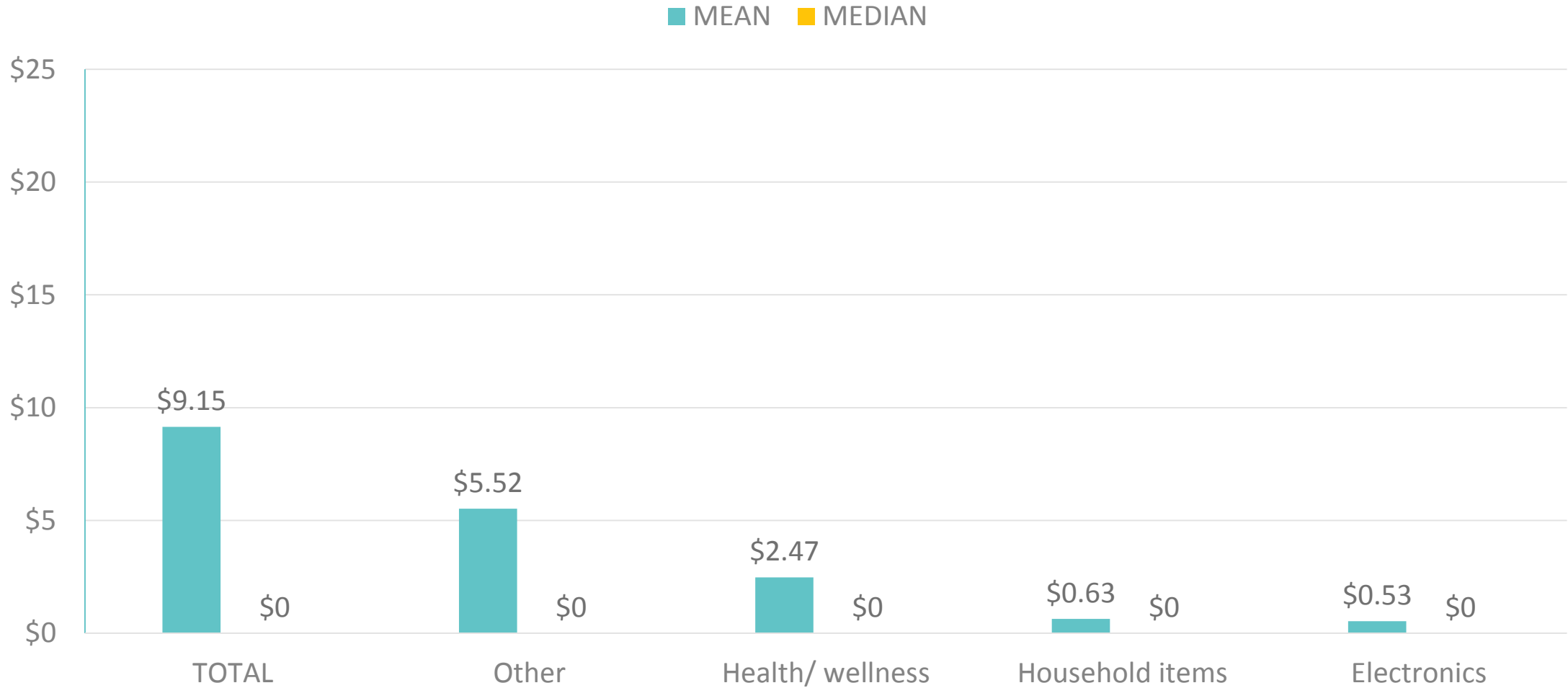


ONISLE – TOTAL SHOPPING TRACKING

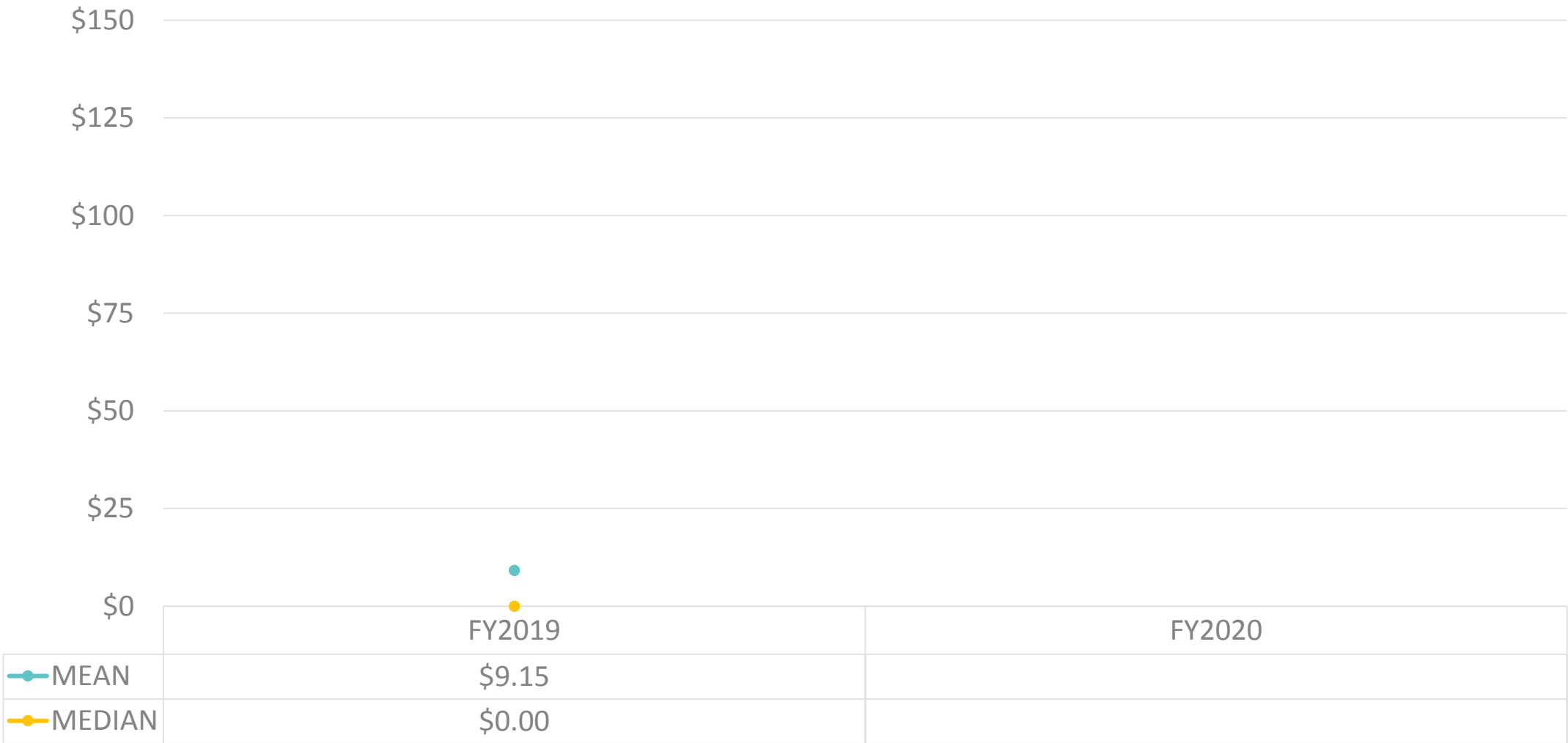


	FY2019	FY2020
MEAN	\$442.58	
MEDIAN	\$100.00	

ONISLE – MISCELLANEOUS



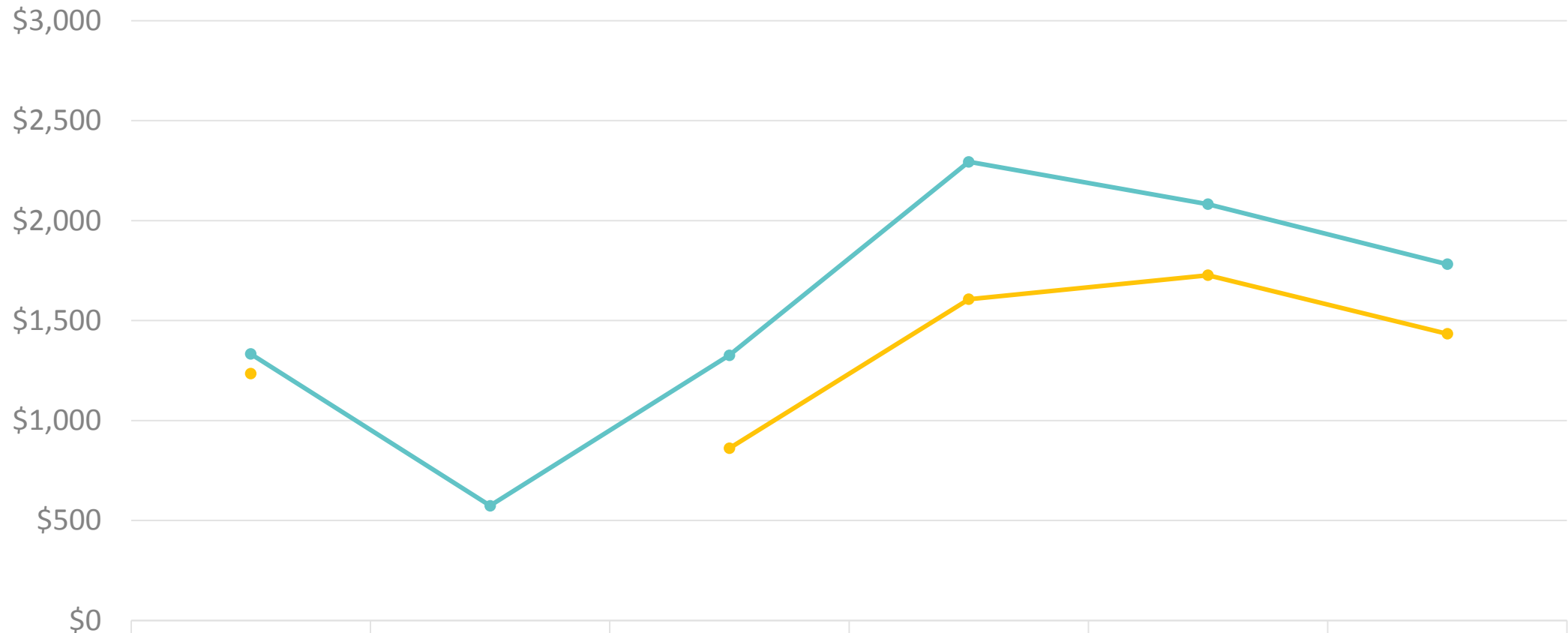
ONISLE – MISCELLANEOUS TRACKING



TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

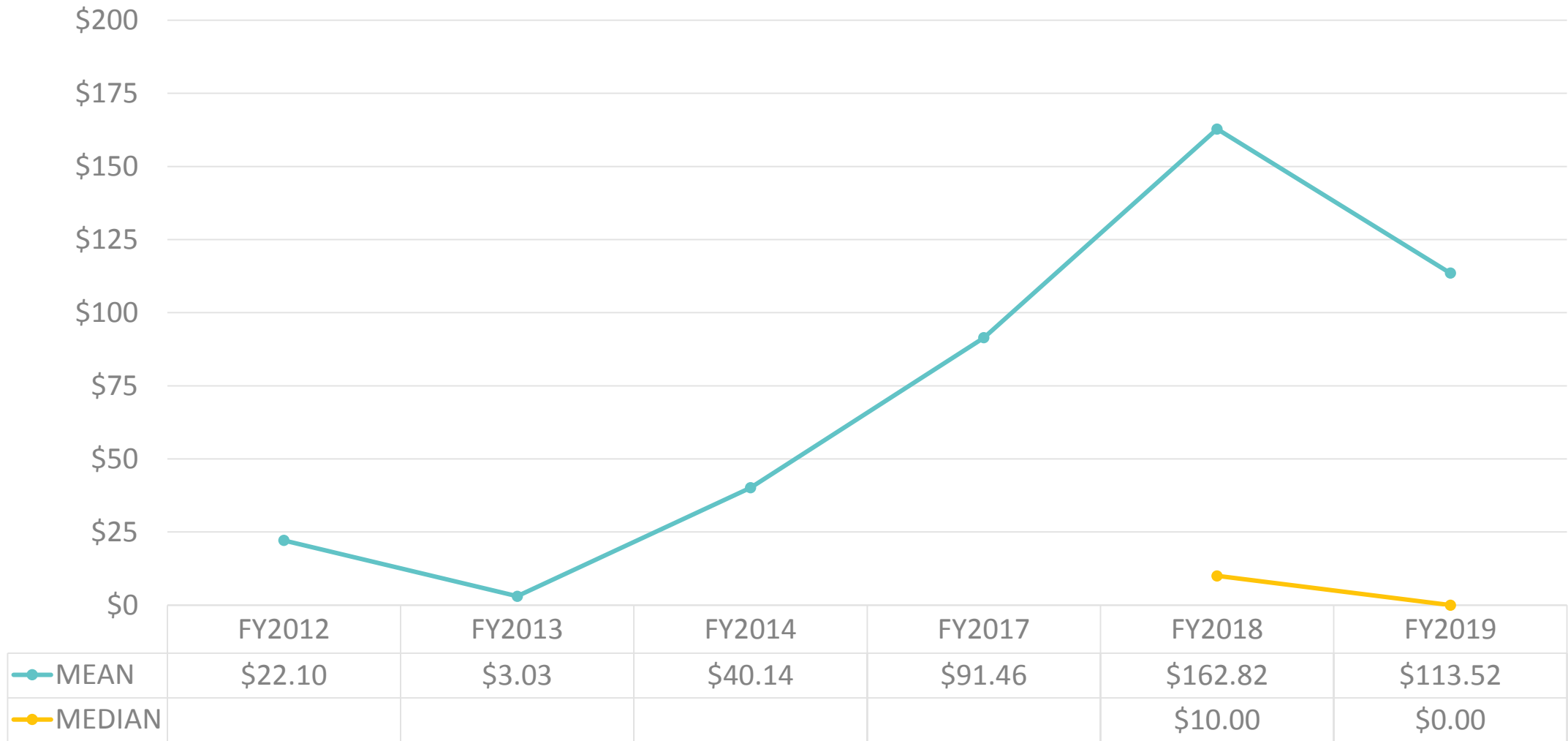
- \$1,782.16 = Mean average per person
- \$1,434.00 = Median amount spent per person

TOTAL EXPENDITURES PER PERSON TRACKING



	FY2012	FY2013	FY2014	FY2017	FY2018	FY2019
MEAN	\$1,333.00	\$573.43	\$1,326.38	\$2,294.21	\$2,082.34	\$1,782.16
MEDIAN	\$1,235.00		\$861.00	\$1,607.00	\$1,727.00	\$1,434.00

GUAM AIRPORT EXPENDITURE TRACKING



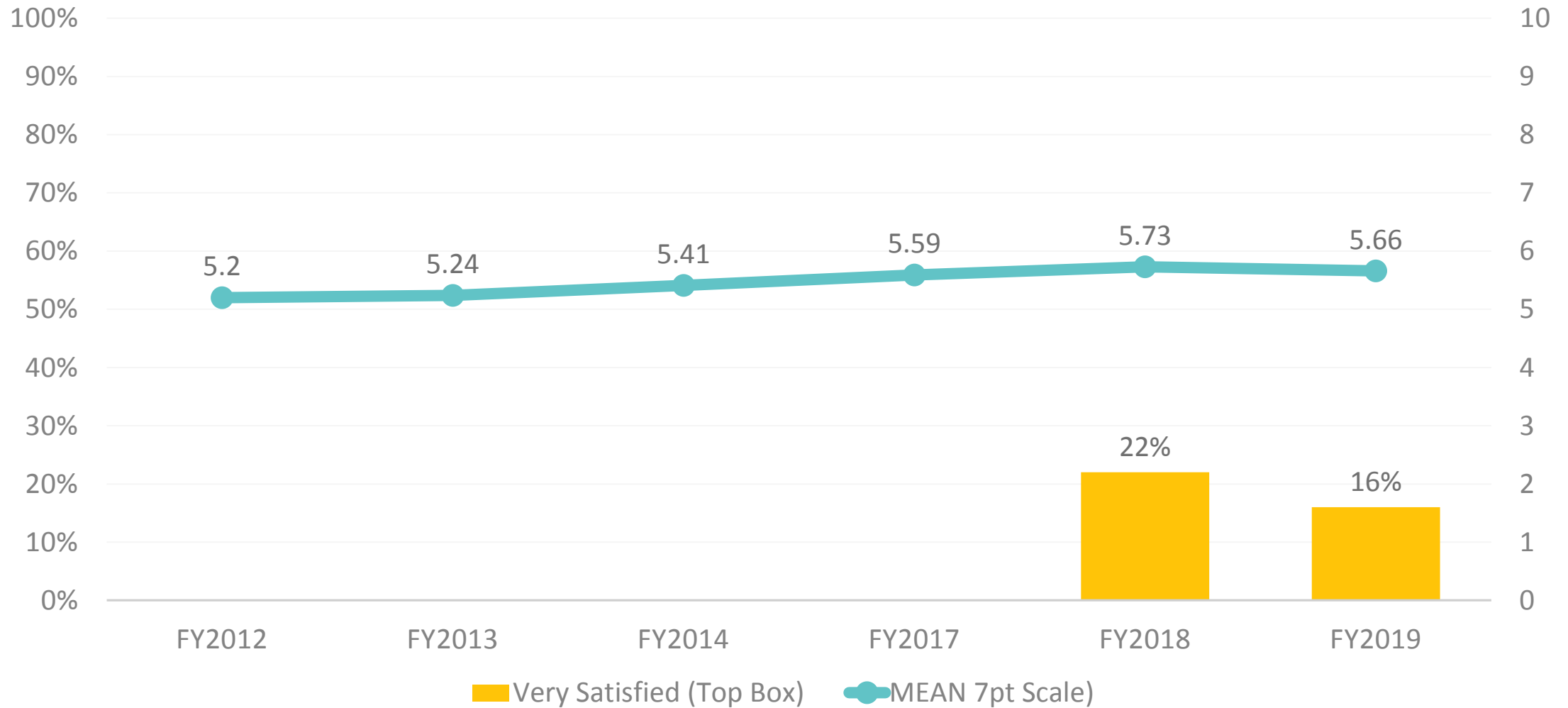


SECTION 4

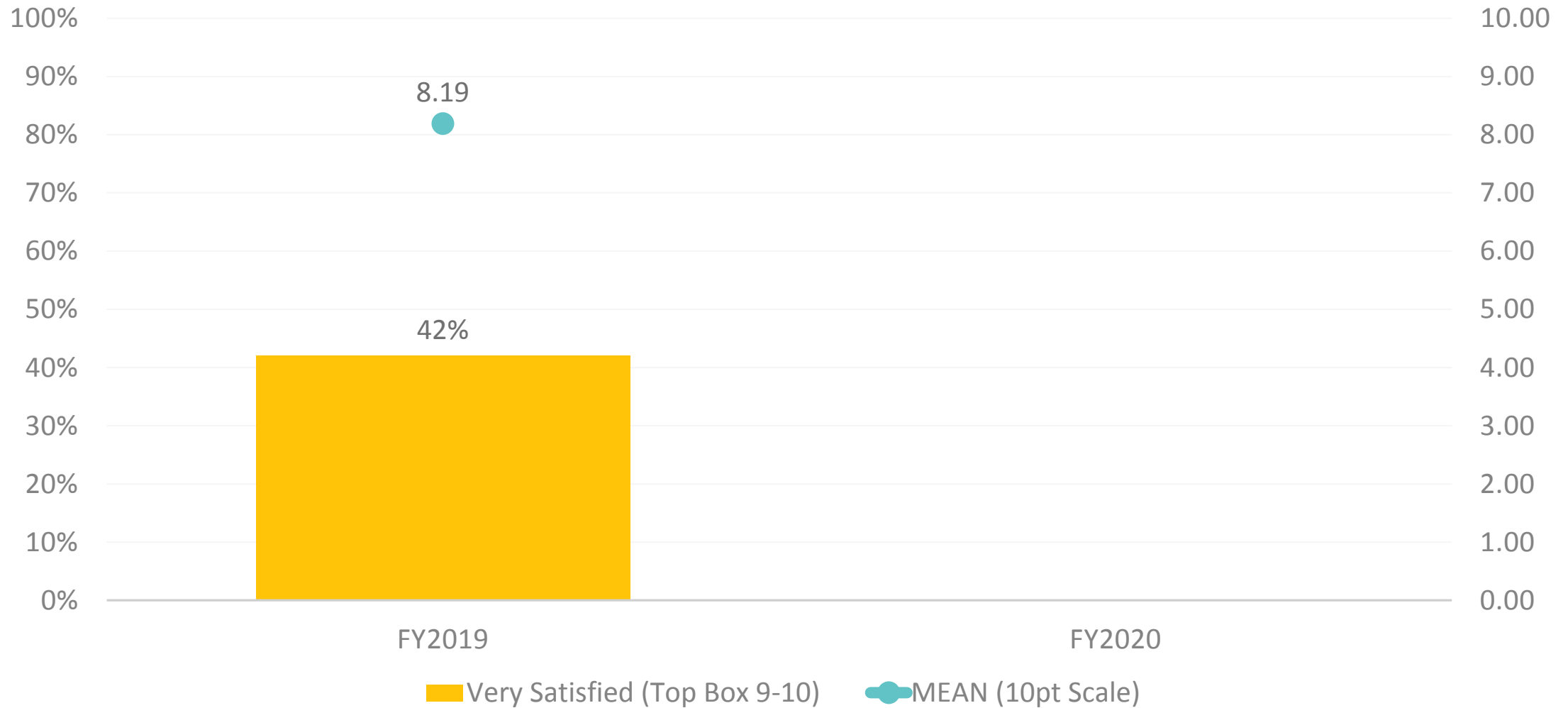
VISITOR SATISFACTION



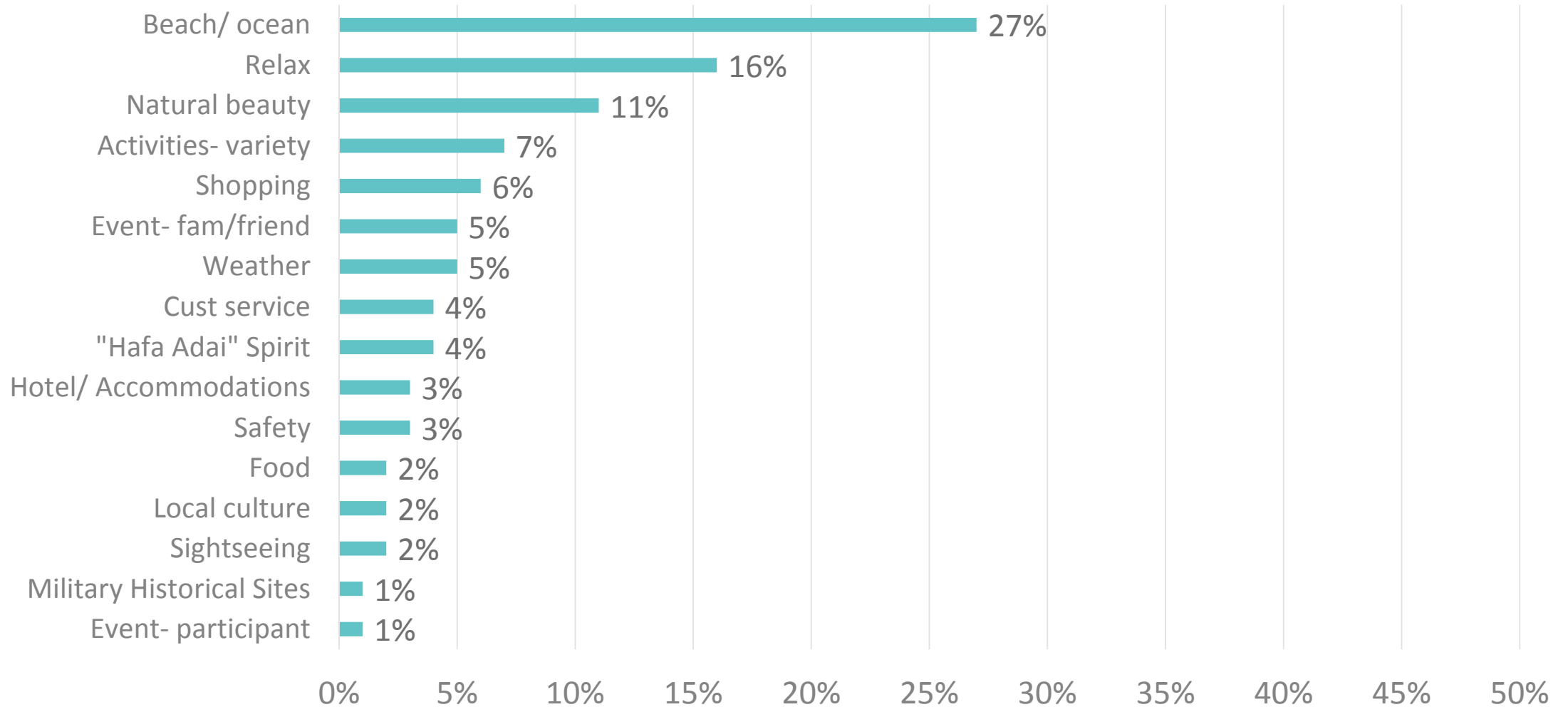
OVERALL SATISFACTION – 7PT SCALE



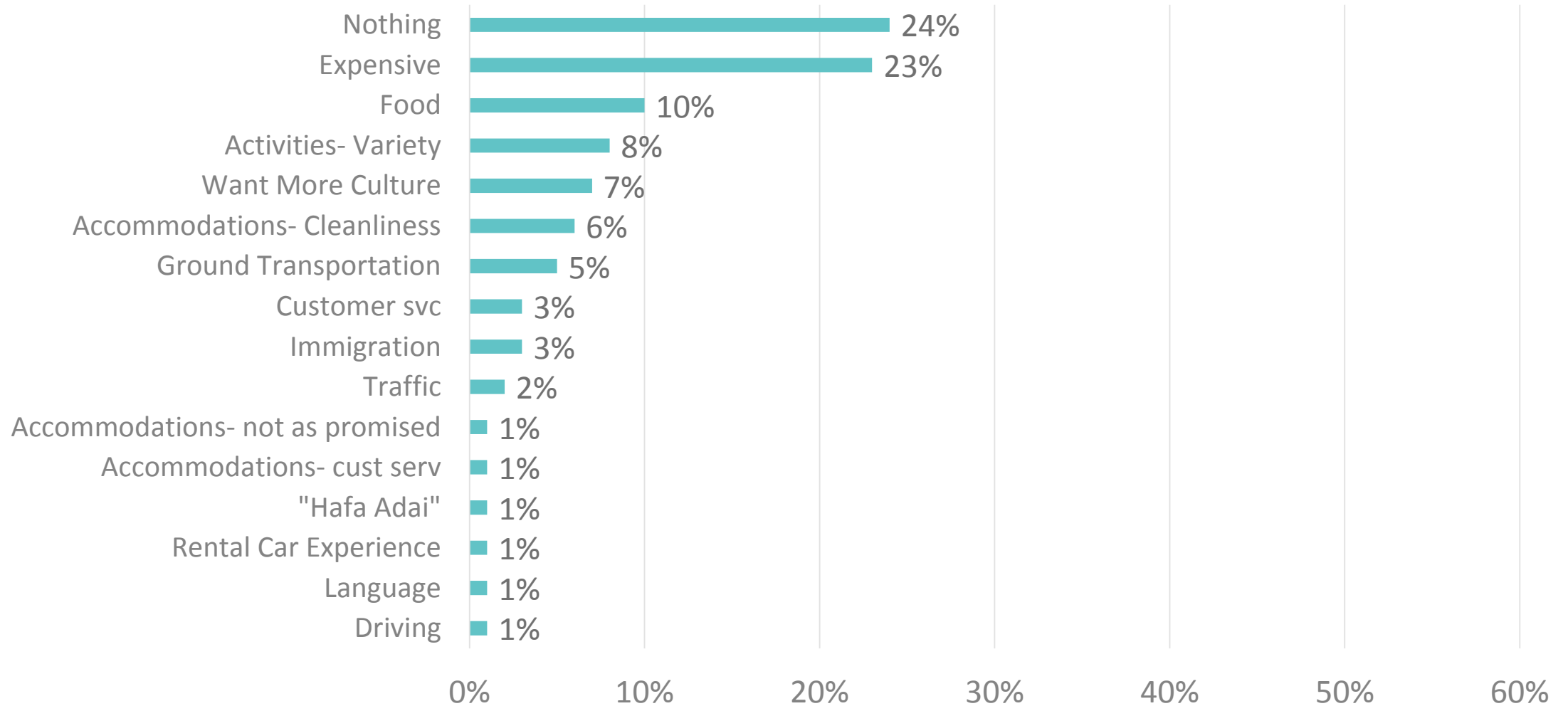
OVERALL SATISFACTION – 10PT SCALE



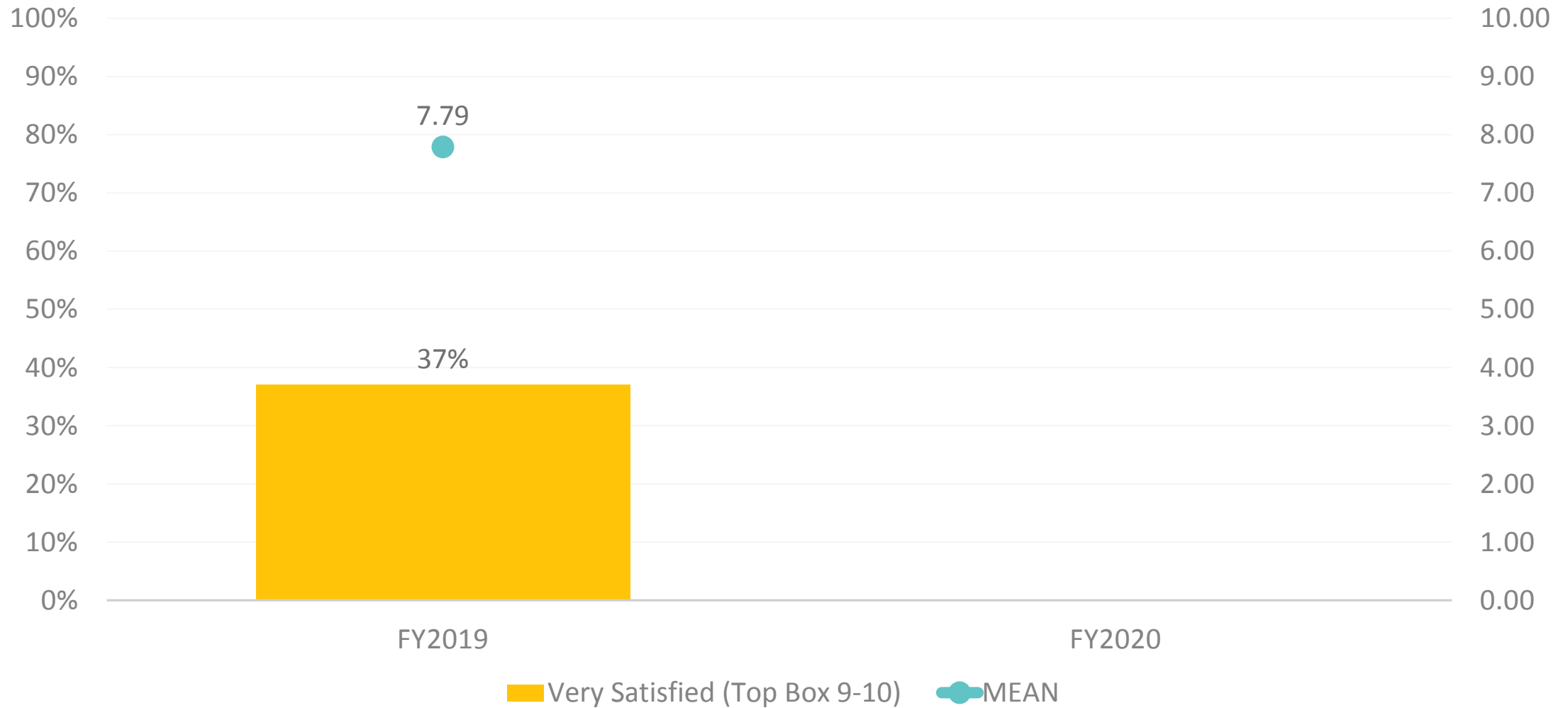
SWOT – POSITIVE ASPECT OF TRIP



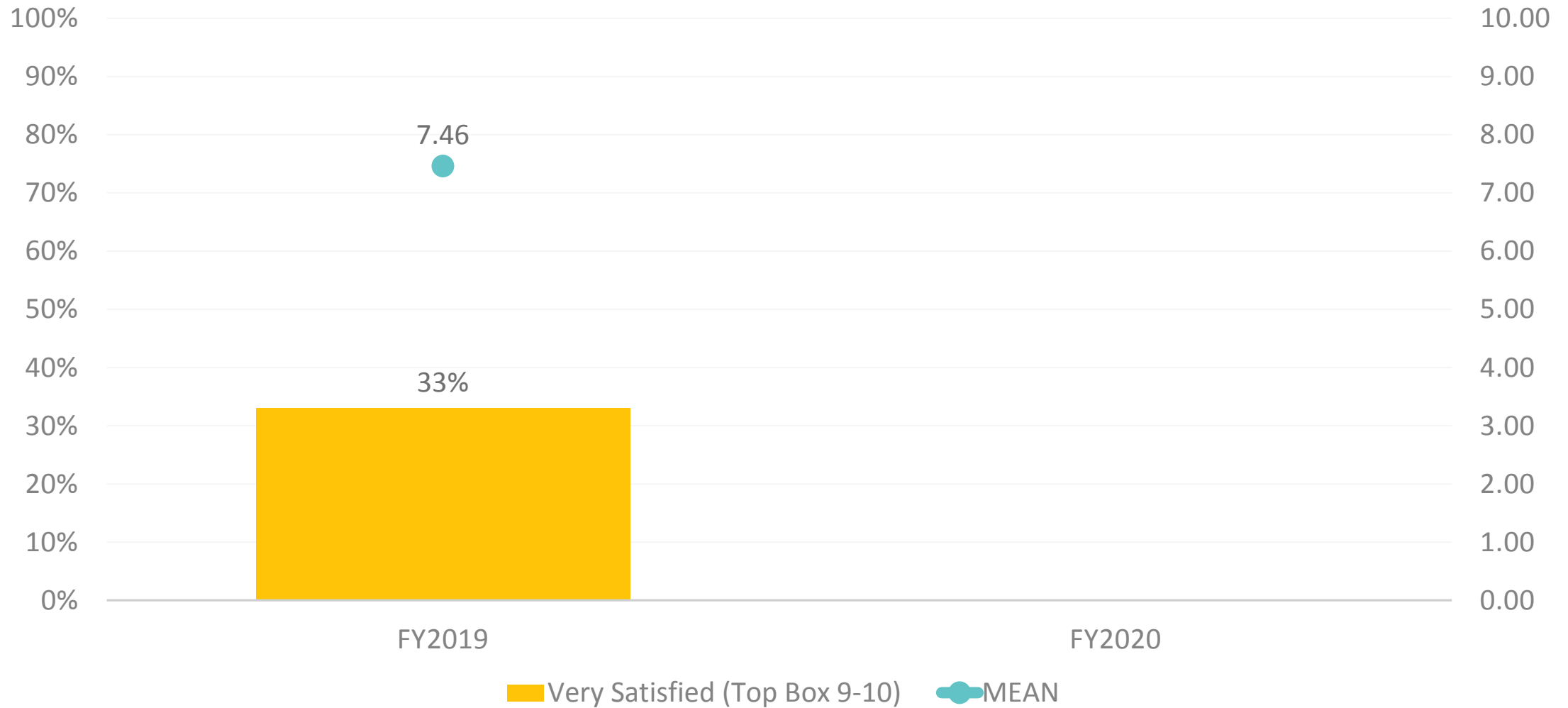
SWOT – NEGATIVE ASPECT OF TRIP



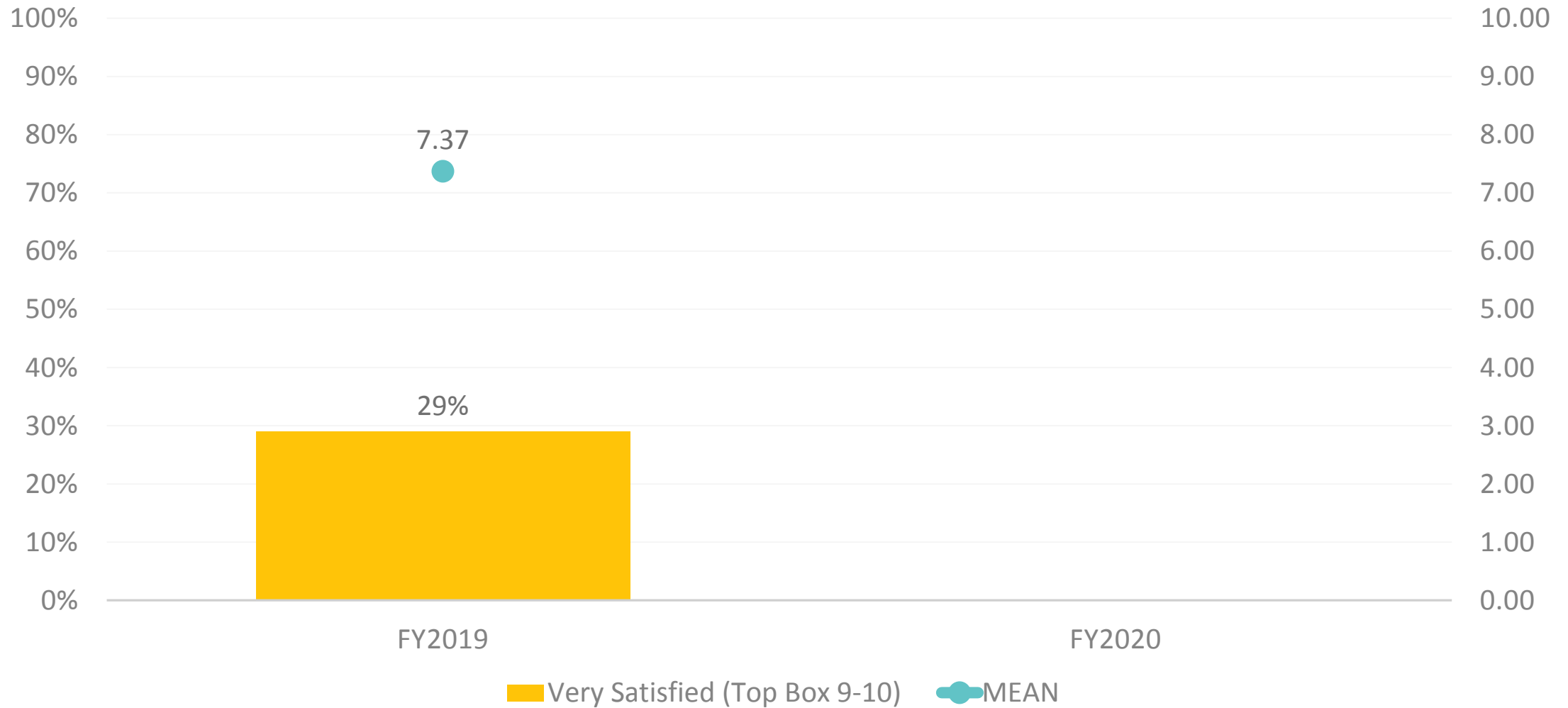
SATISFACTION – ENTERTAINMENT



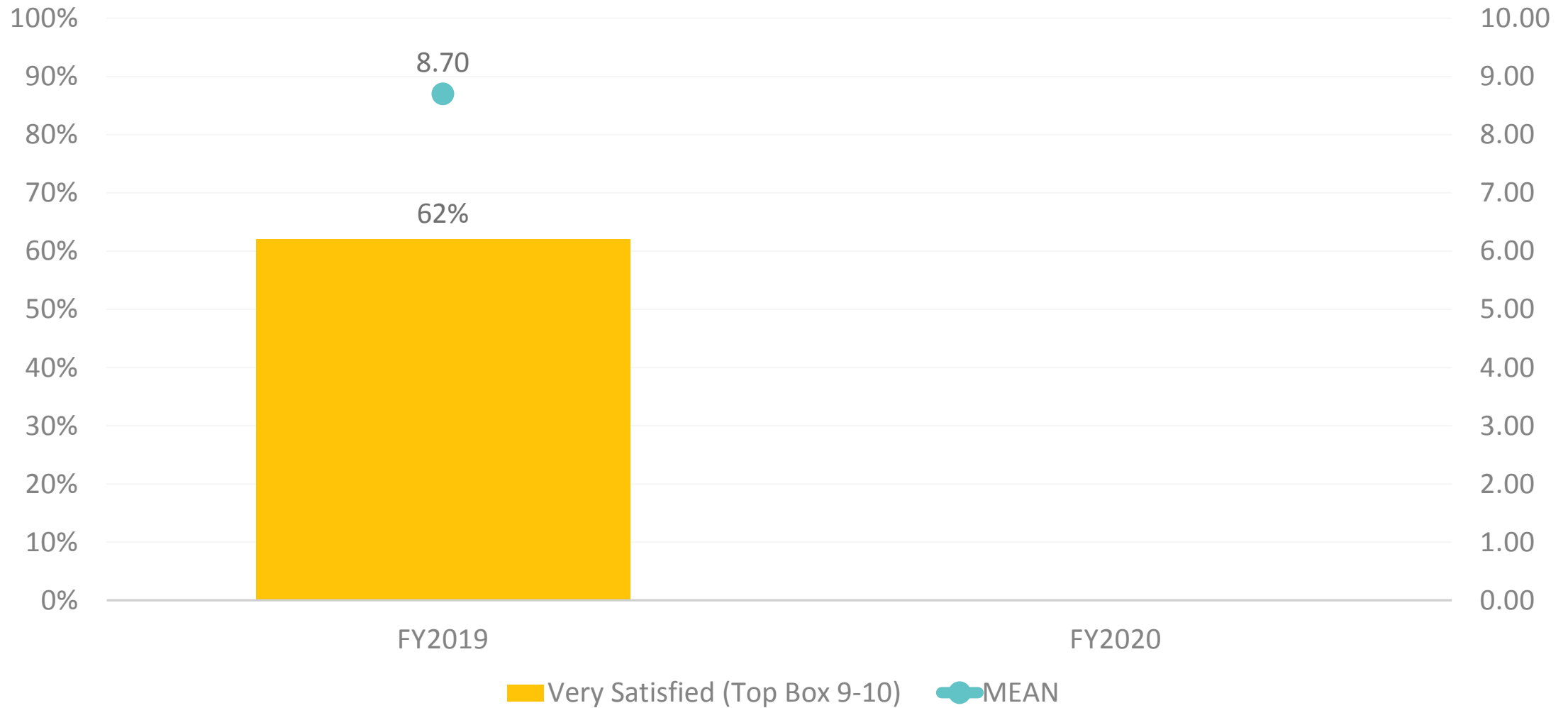
SATISFACTION – SHOPPING



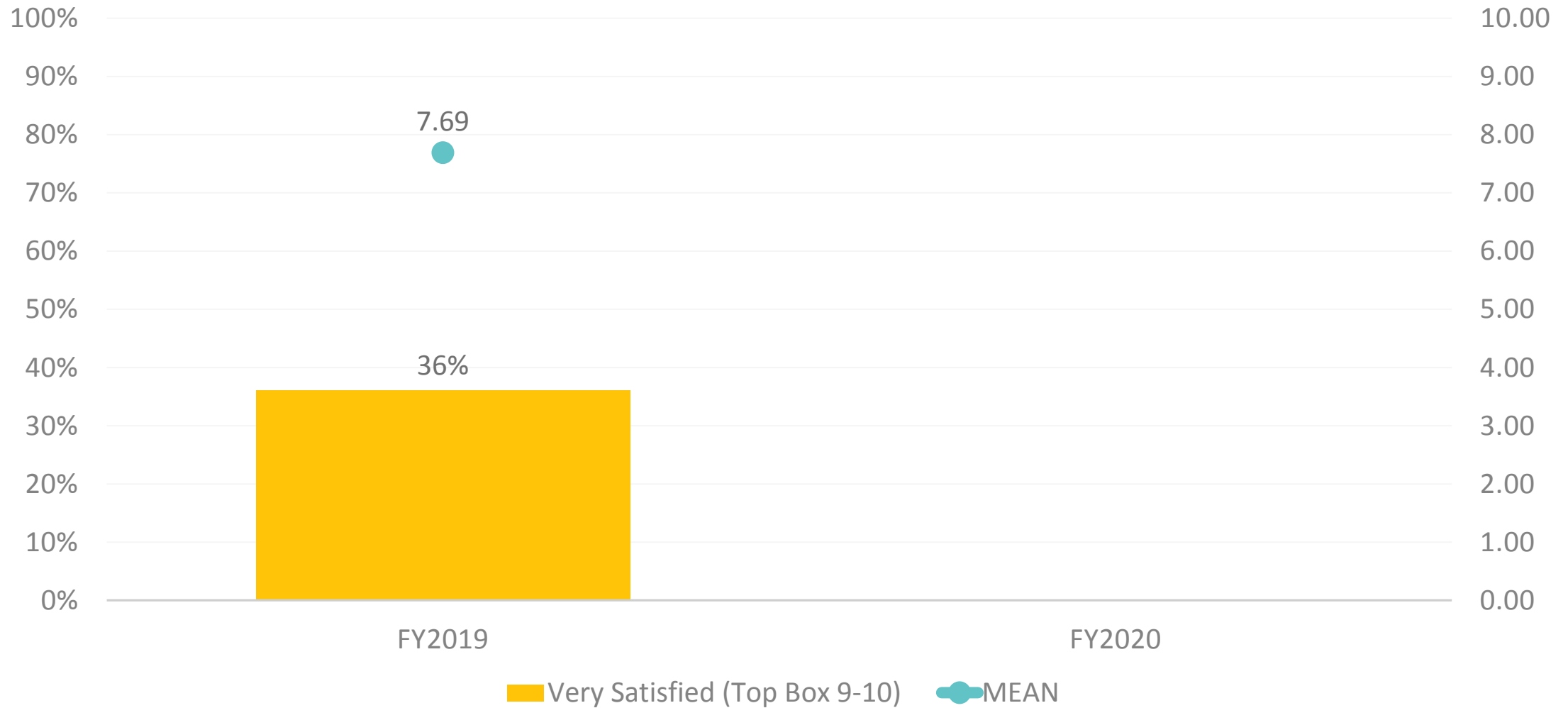
SATISFACTION – DINING



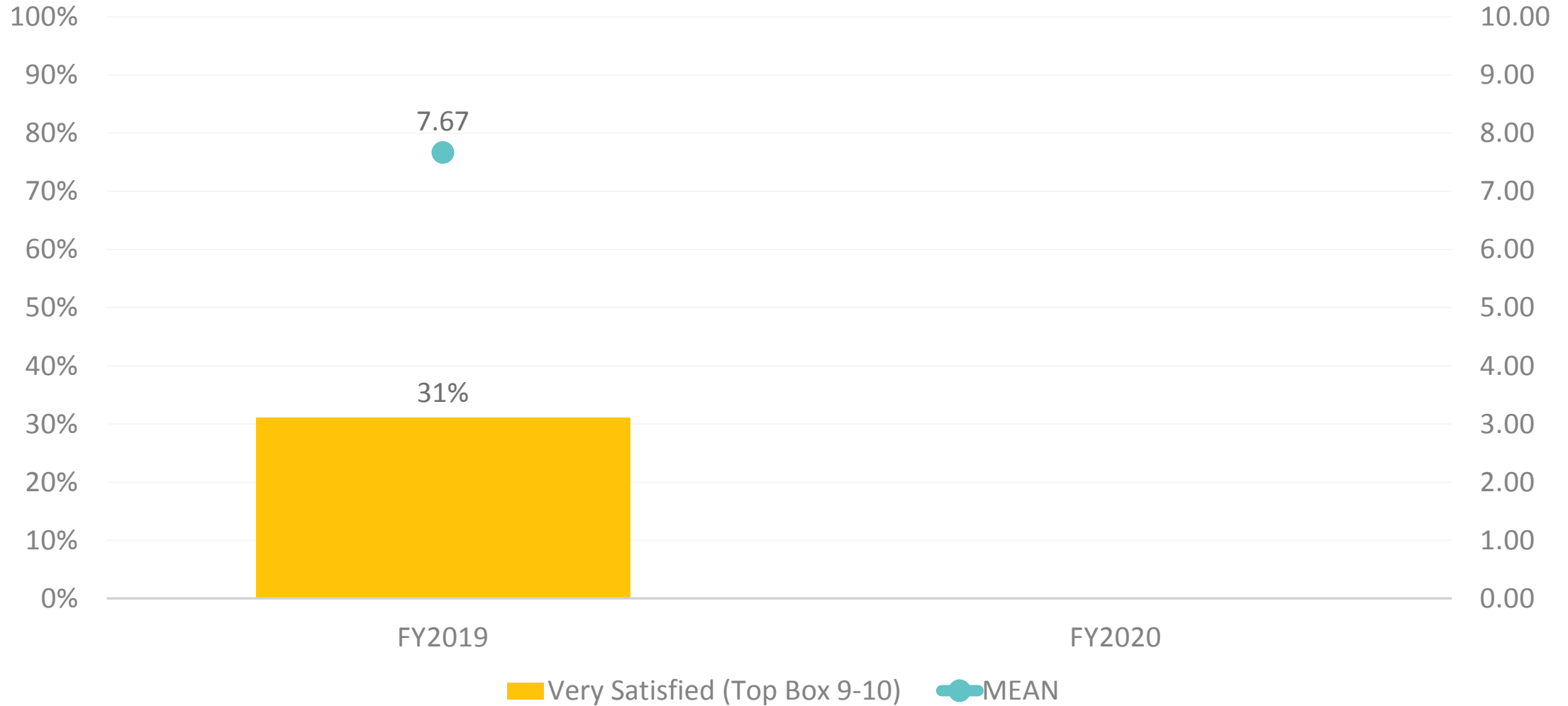
SATISFACTION – BEACHES



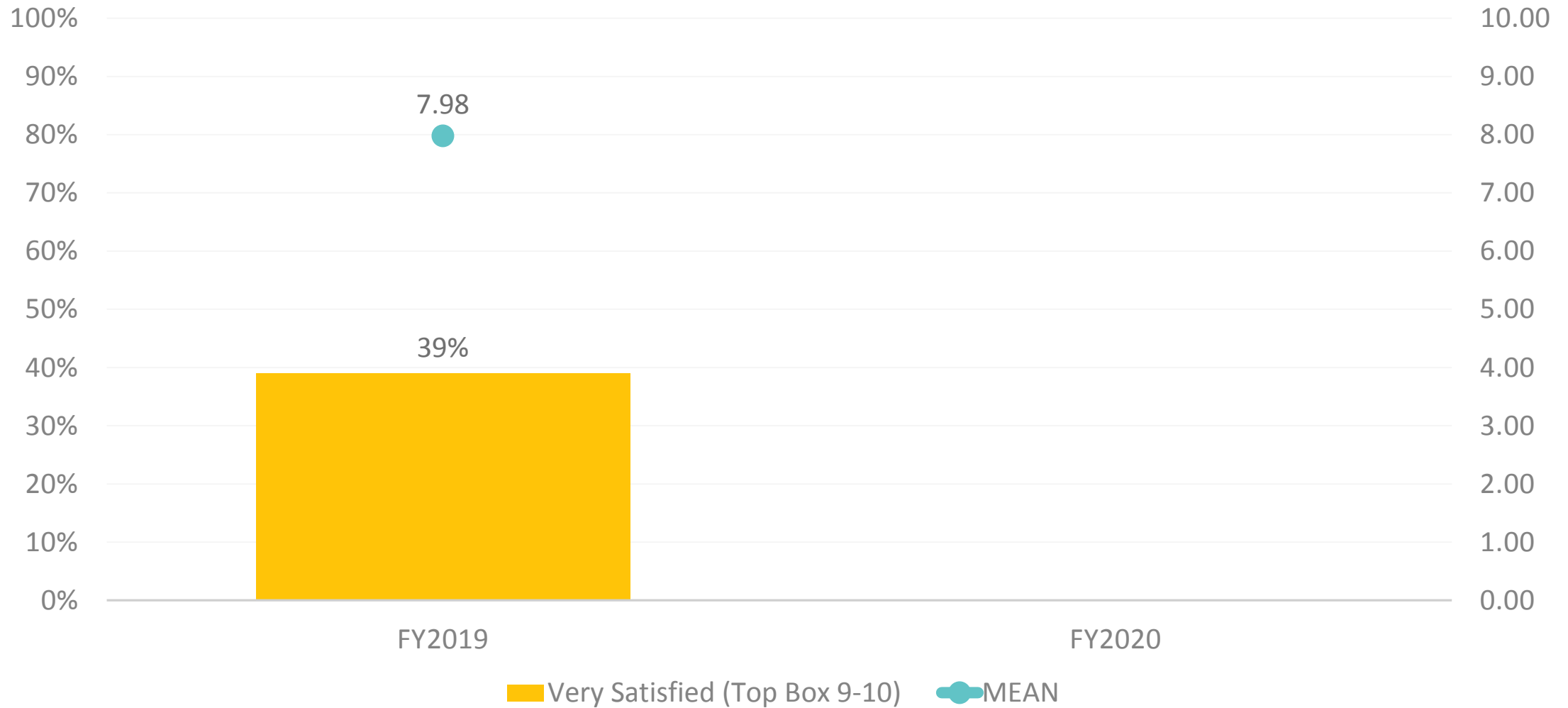
SATISFACTION – PARKS



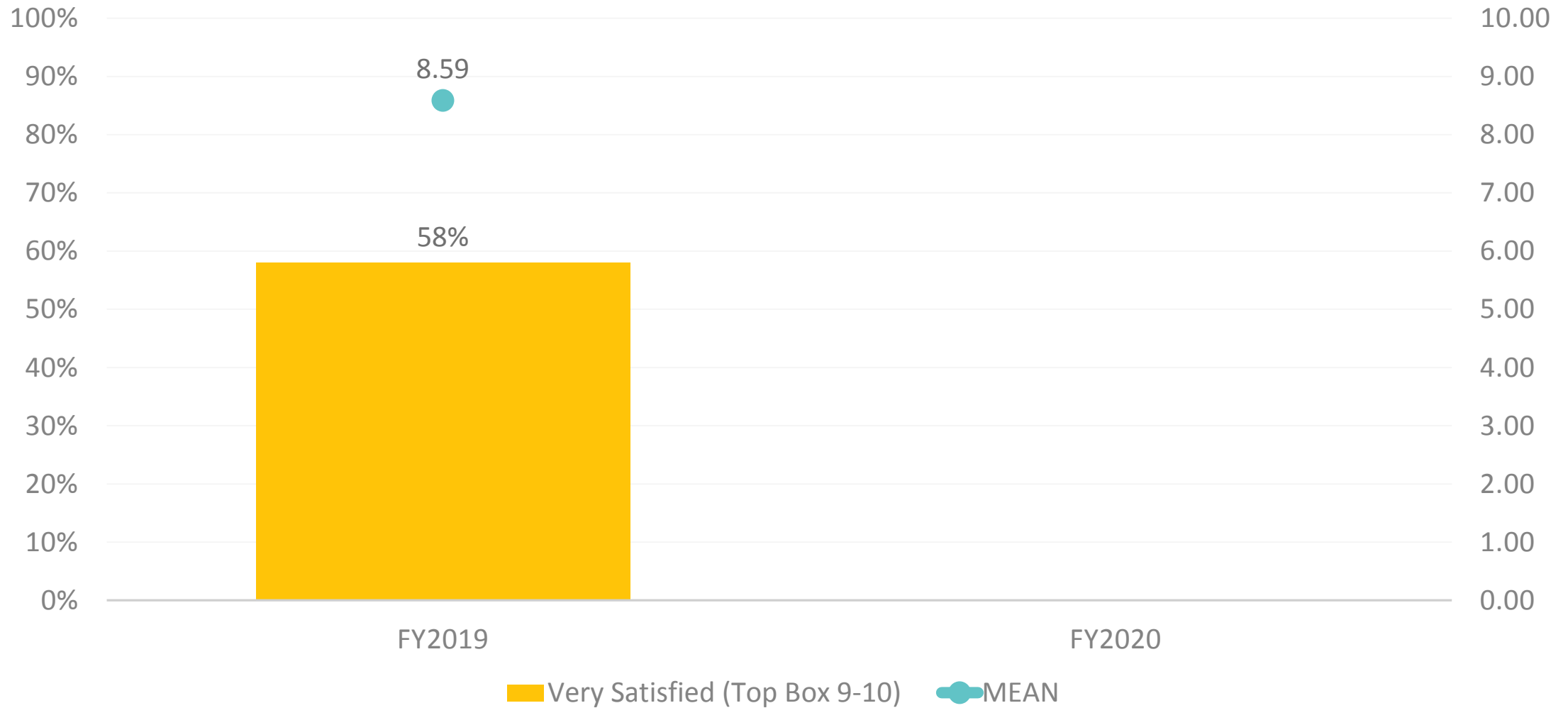
SATISFACTION – ROADS



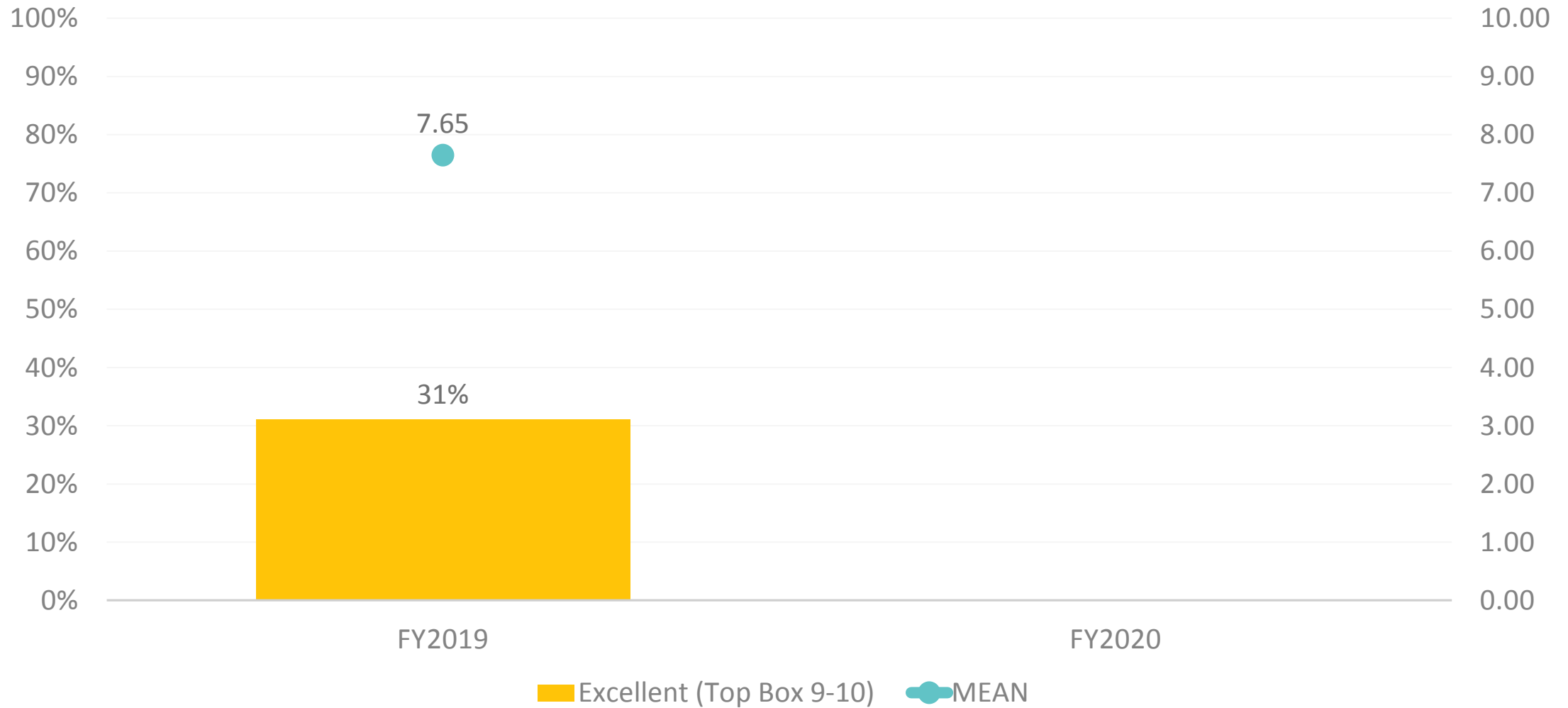
SATISFACTION – SIGHTSEEING AREAS



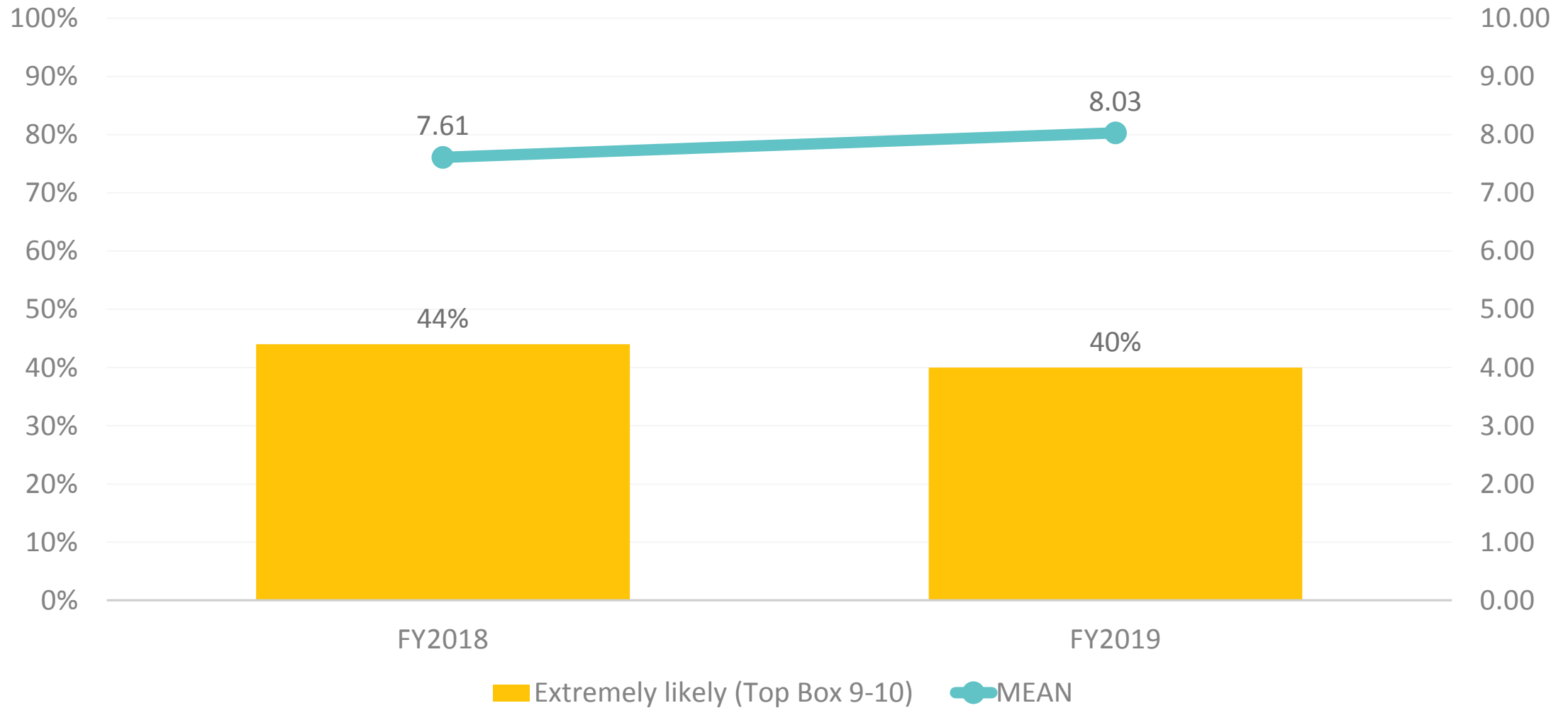
SATISFACTION – SAFETY & SECURITY



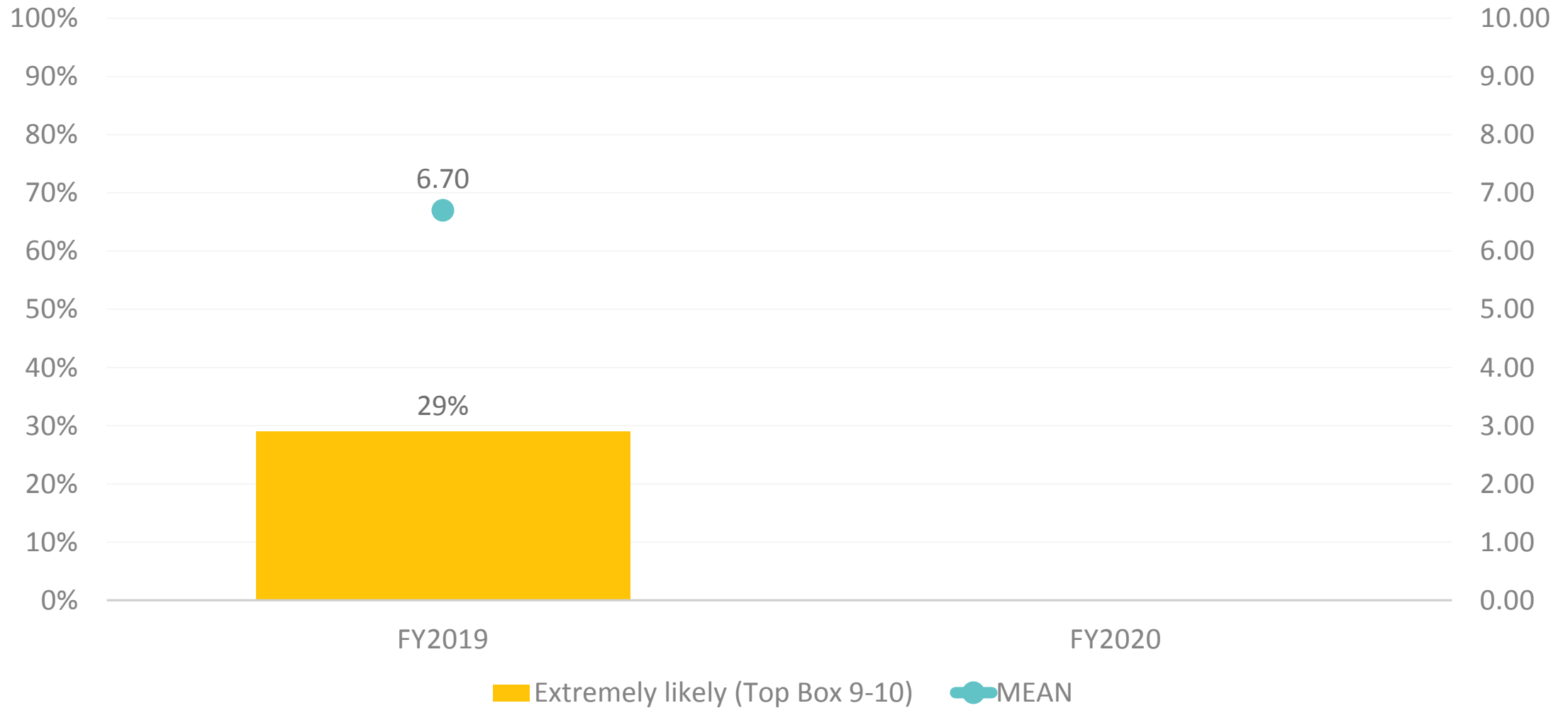
SATISFACTION – ACCOMMODATIONS



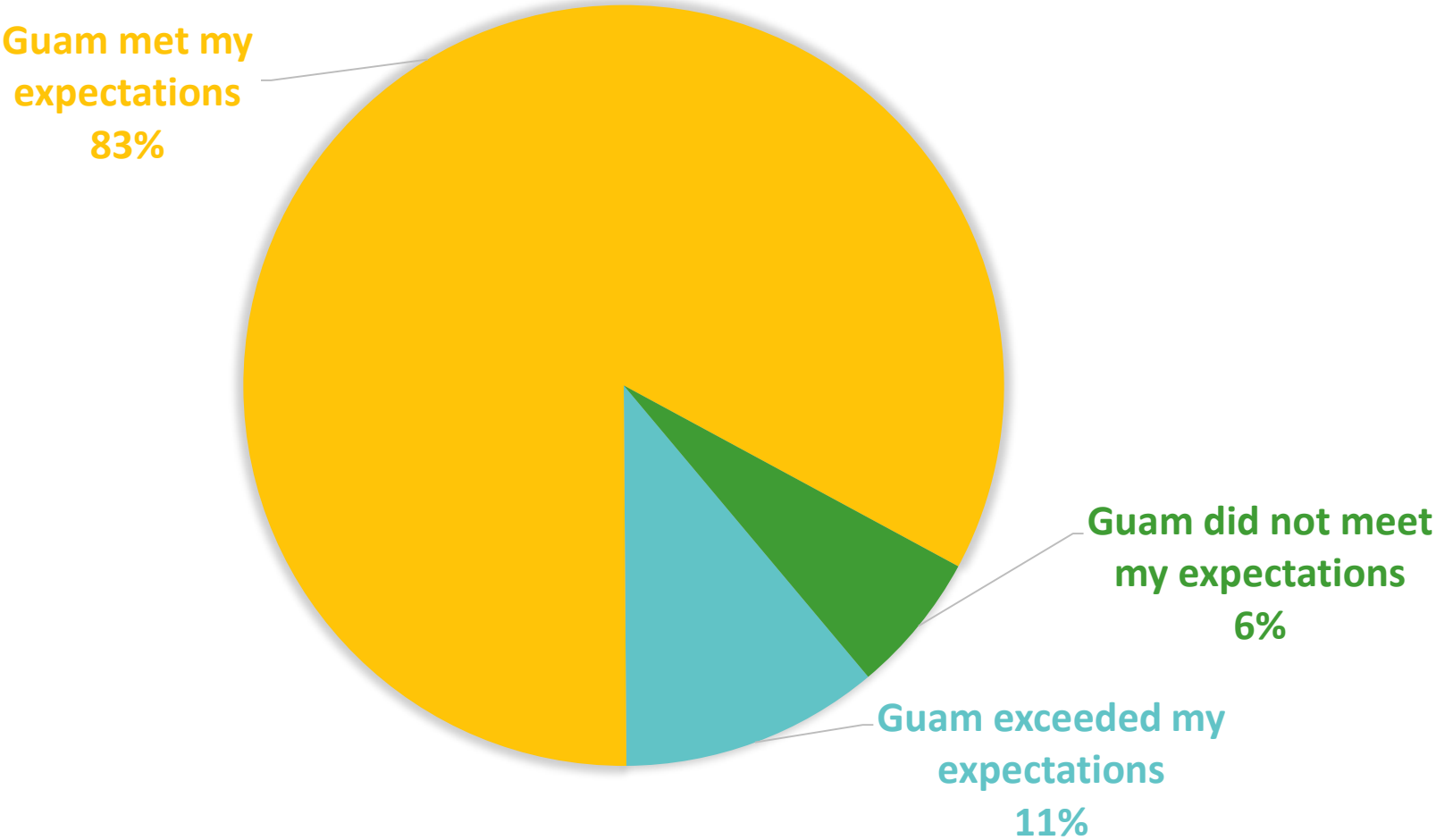
BRAND ADVOCACY



BRAND LOYALTY



TRIP EXPECTATIONS

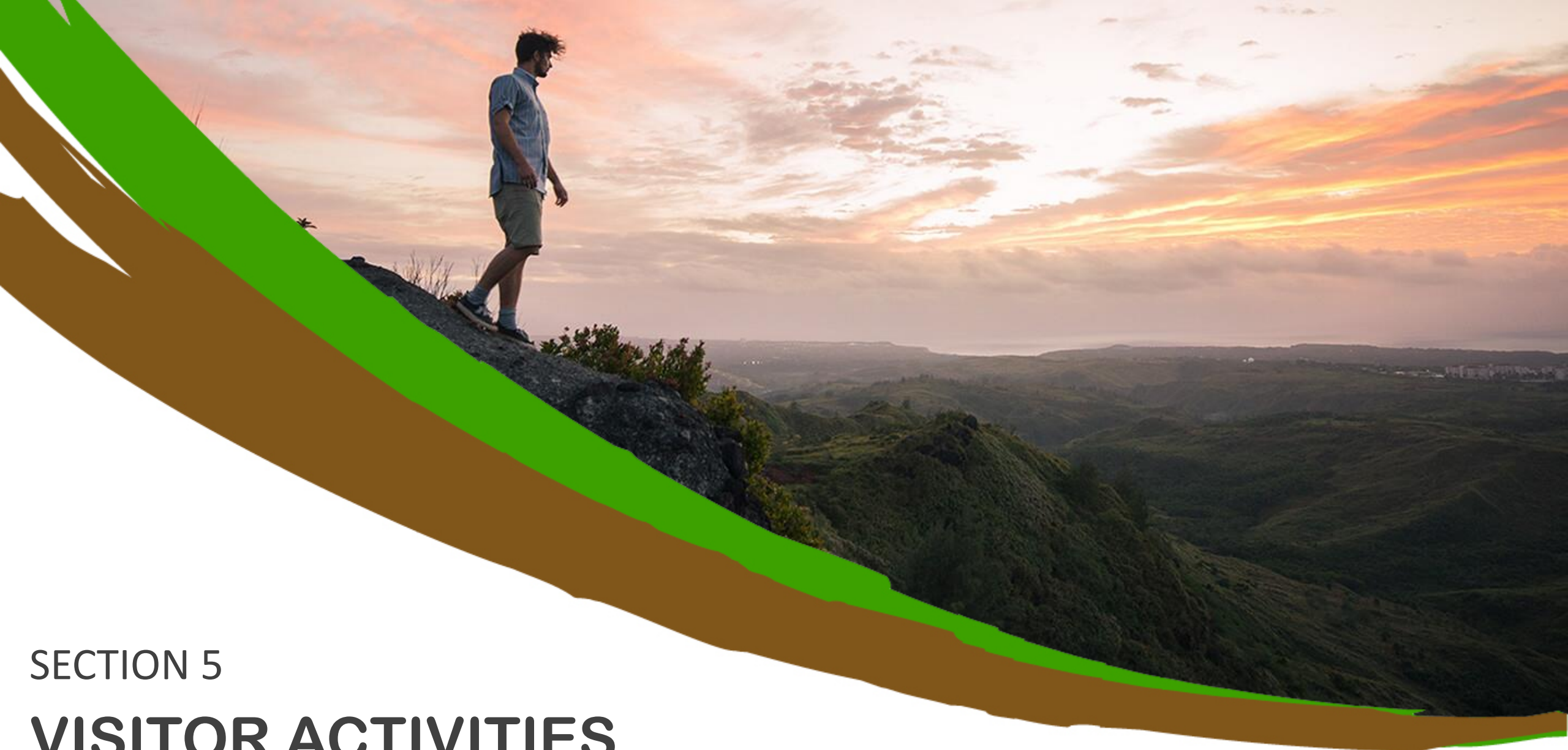


TRIP EXPECTATIONS – TRACKING



	FY2019	FY2020
Exceeded expectations	11%	
Met expectations	83%	
Did not meet expectations	6%	



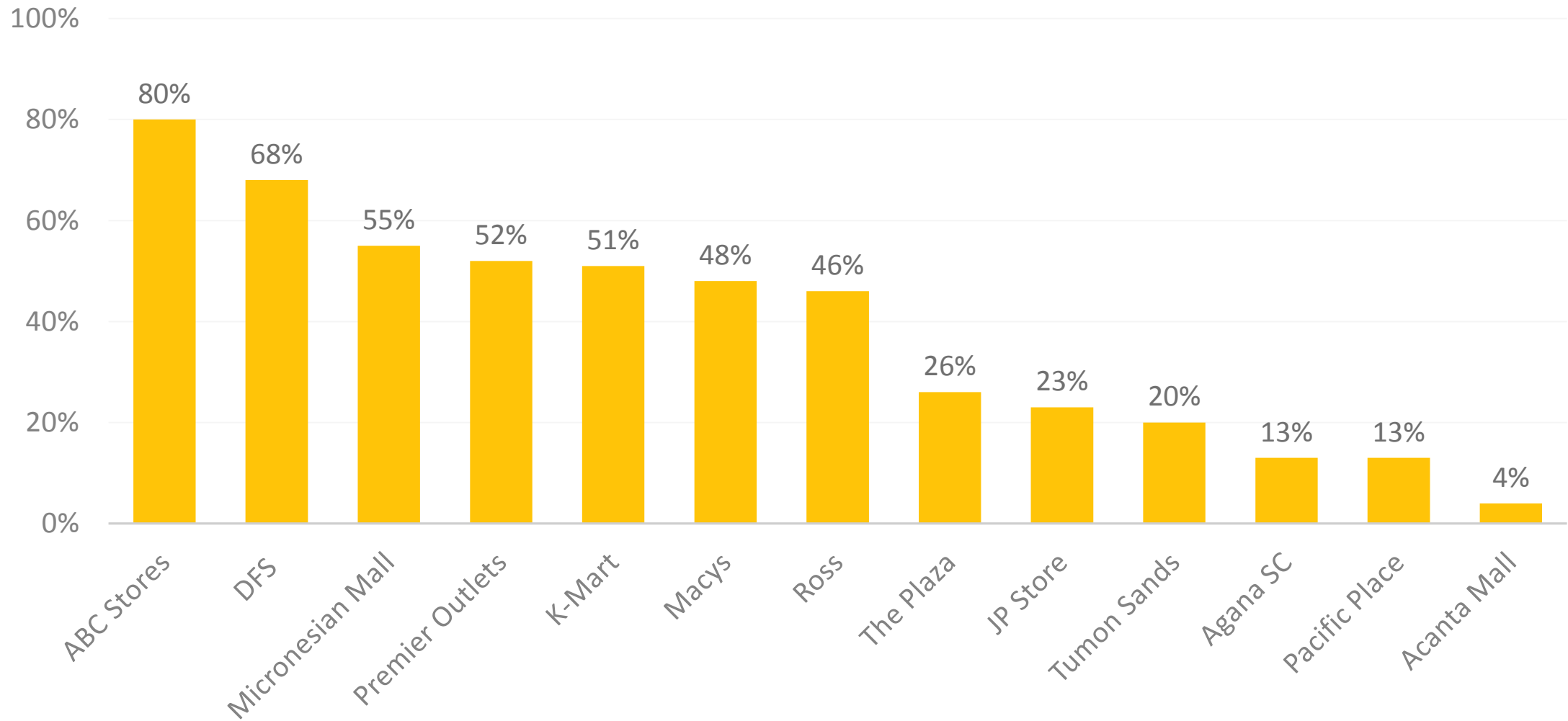


SECTION 5

VISITOR ACTIVITIES



SHOPPING AREAS – PENETRATION



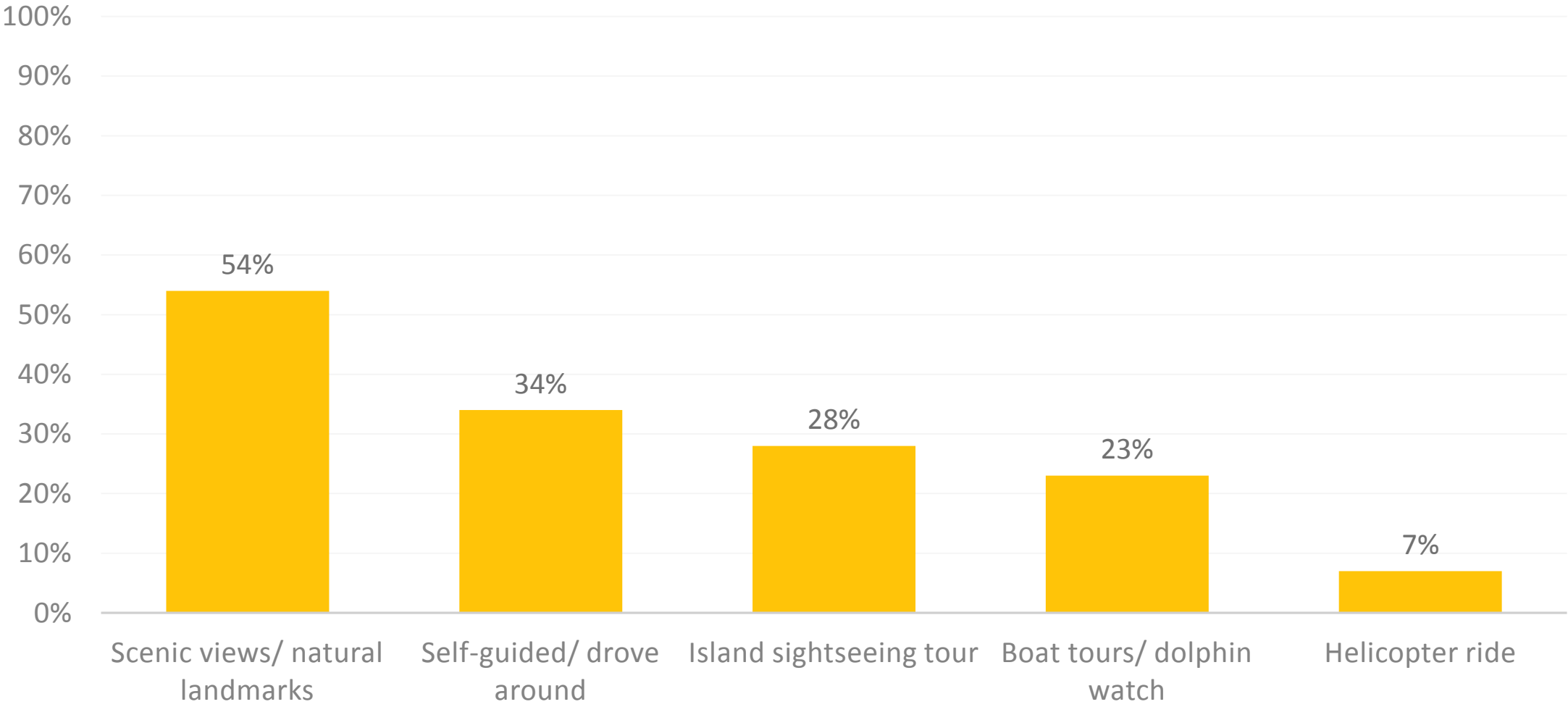
SHOPPING AREAS – TOP 3

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

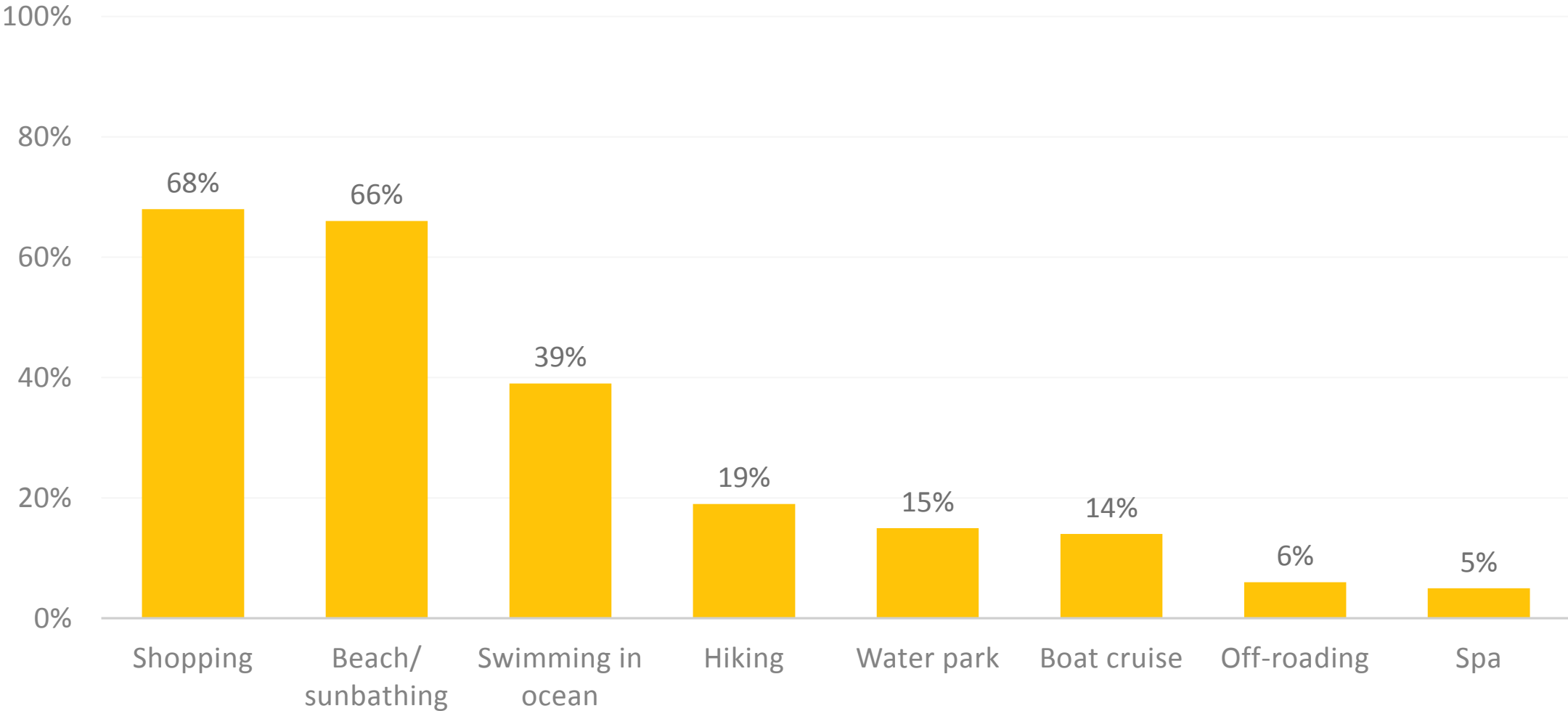
FY2018	FY2019
67% ABC Stores 66% DFS Galleria 51% Macys	80% ABC Stores 68% DFS Galleria 55% Micronesia Mall



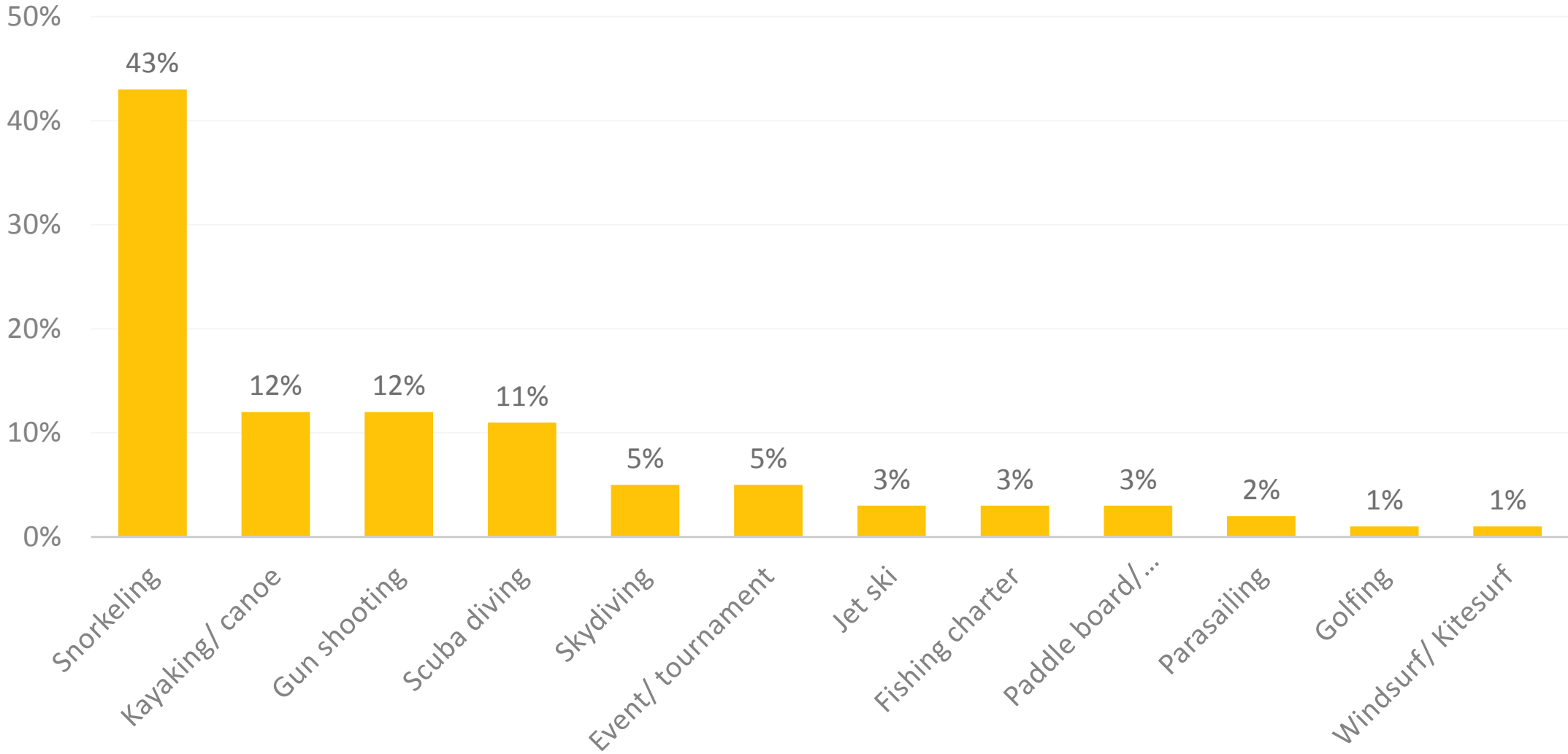
ACTIVITIES – SIGHTSEEING



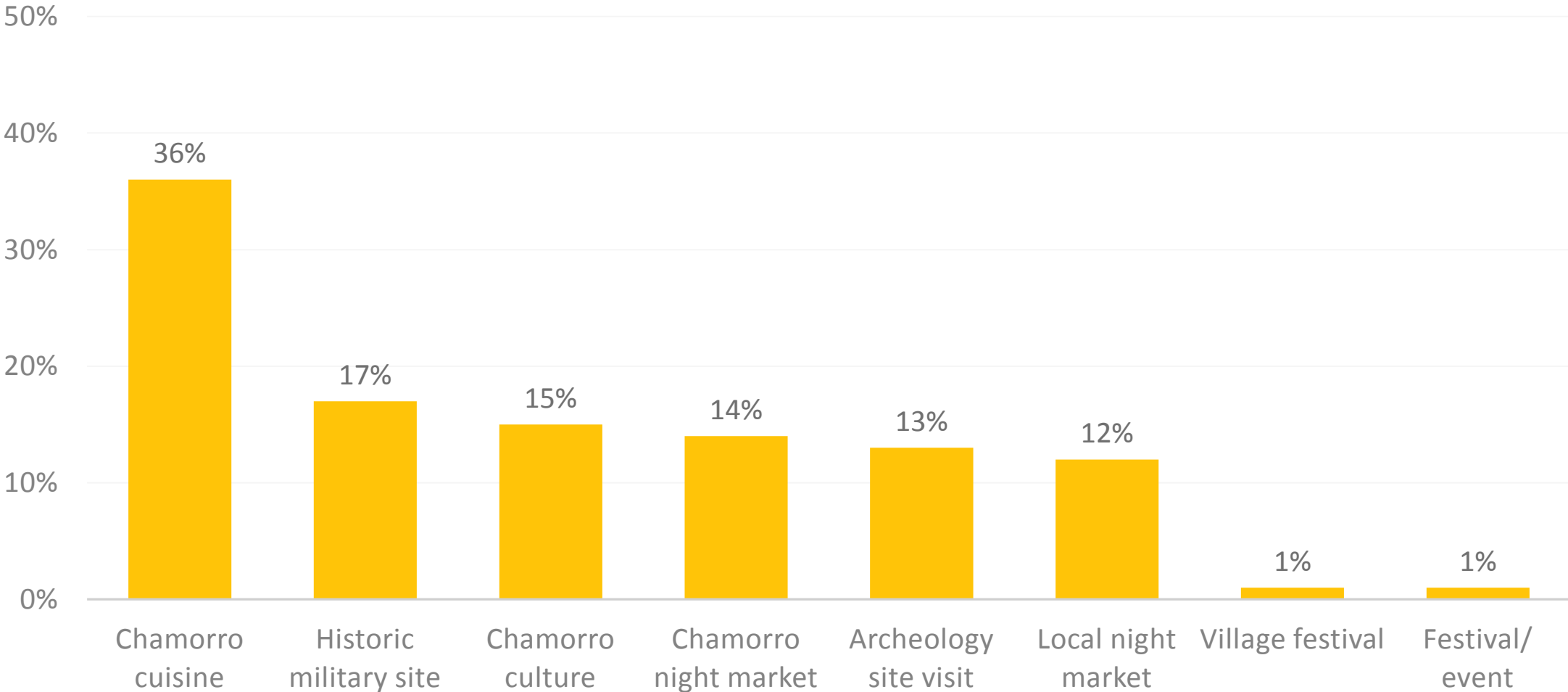
ACTIVITIES – RECREATION



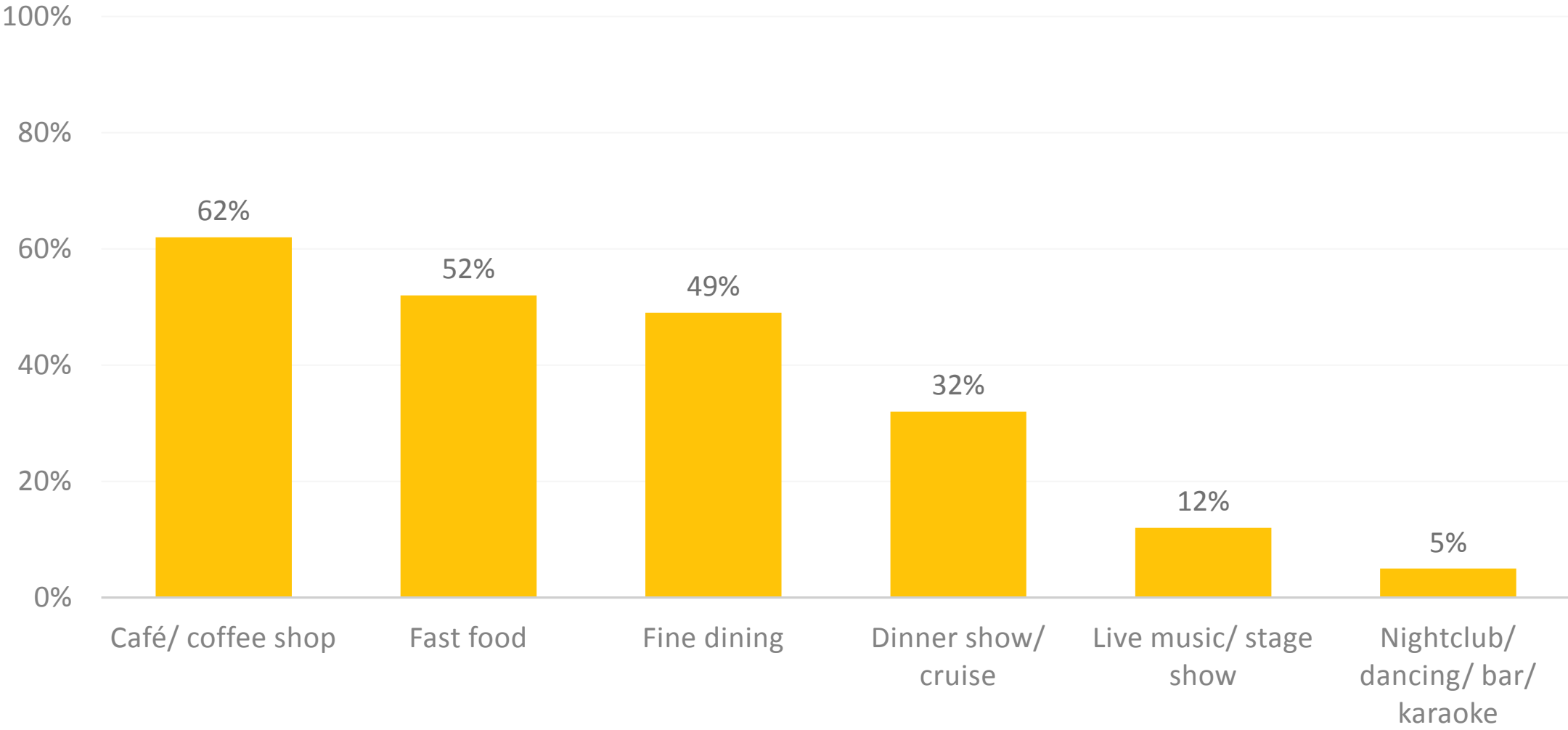
ACTIVITIES – SPORTS



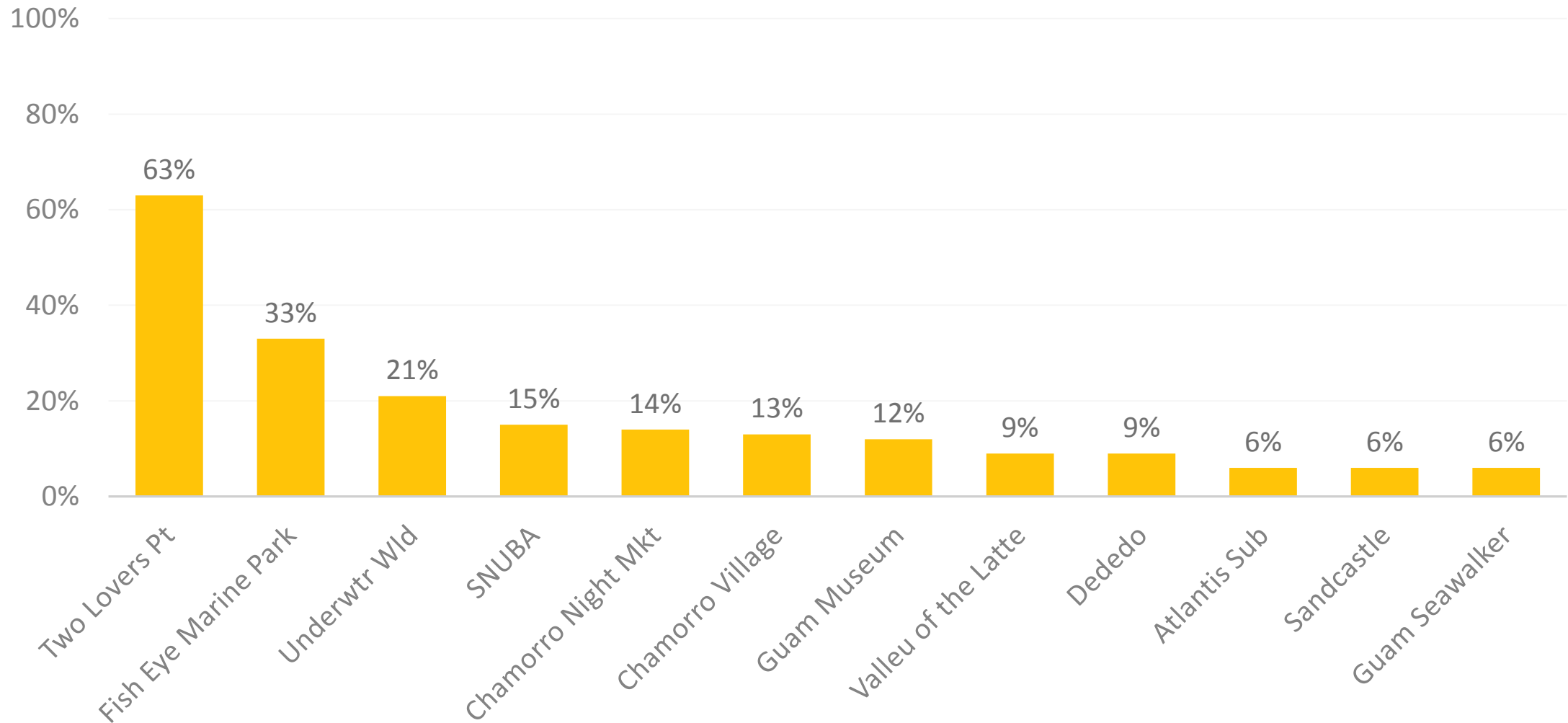
ACTIVITIES – HISTORY, CULTURE, ARTS



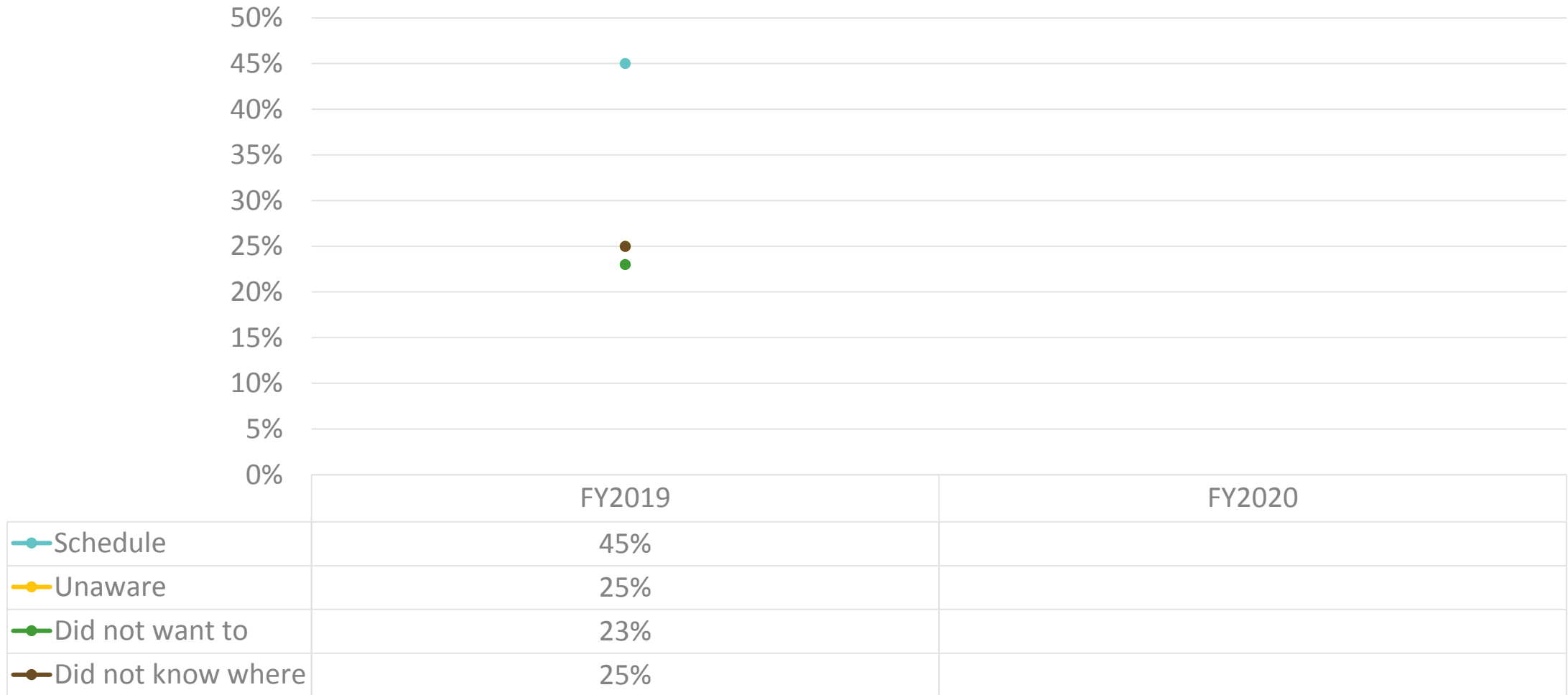
ACTIVITIES – ENTERTAINMENT & DINING



LOCAL ATTRACTIONS – TOP RESPONSES (5%+)



LOCAL CULTURE – OBSTACLES



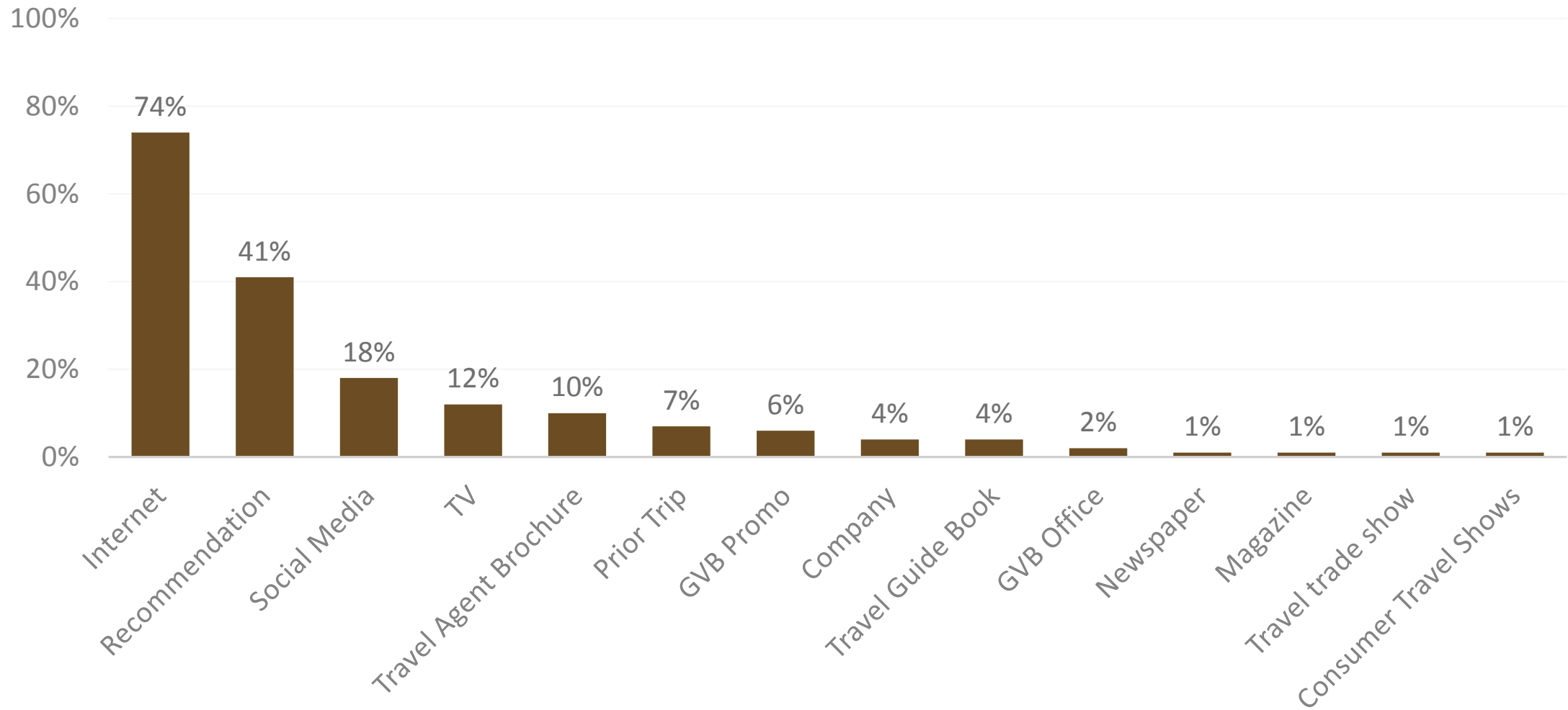


SECTION 6

SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION - SEGMENTATION

GVB VISITOR SATISFACTION STUDY

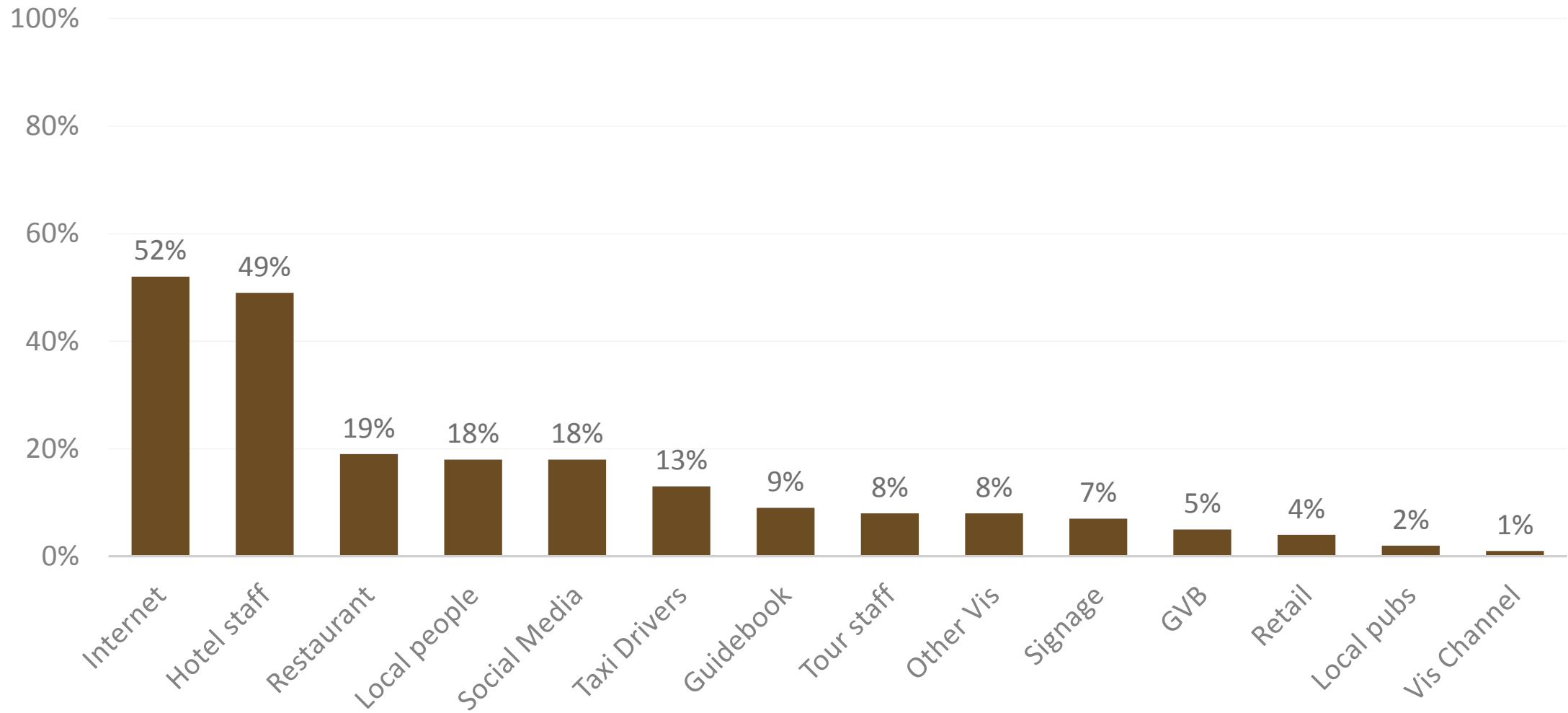
Q5 Please select the top three sources of information you used to find out about Guam before your trip

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
Q5	Internet/Mobile App	74%	60%	74%	100%
	Friend or relative	41%	56%	39%	33%
	Social media	18%	21%	24%	42%
	TV	12%	5%	11%	8%
	Travel agent brochure	10%	14%	10%	
	I have been to Guam before	7%	9%	5%	8%
	Guam Visitors Bureau promotional activities	6%	6%	6%	17%
	Travel guide book at bookstores	4%	2%	2%	
	Co-worker/ company travel department	4%	3%	3%	
	Guam Visitors Bureau office	2%	3%	3%	
	Magazine (consumer)	1%	1%	2%	
	Travel trade shows	1%	1%	2%	8%
	Consumer travel shows	1%	3%	1%	8%
	Newspaper	1%	2%	1%	
	Radio	0%			
	Total	424	116	175	12

Prepared by Anthology Research



ONISLE SOURCES OF INFORMATION



ONISLE SOURCES OF INFORMATION

GVB VISITOR SATISFACTION STUDY

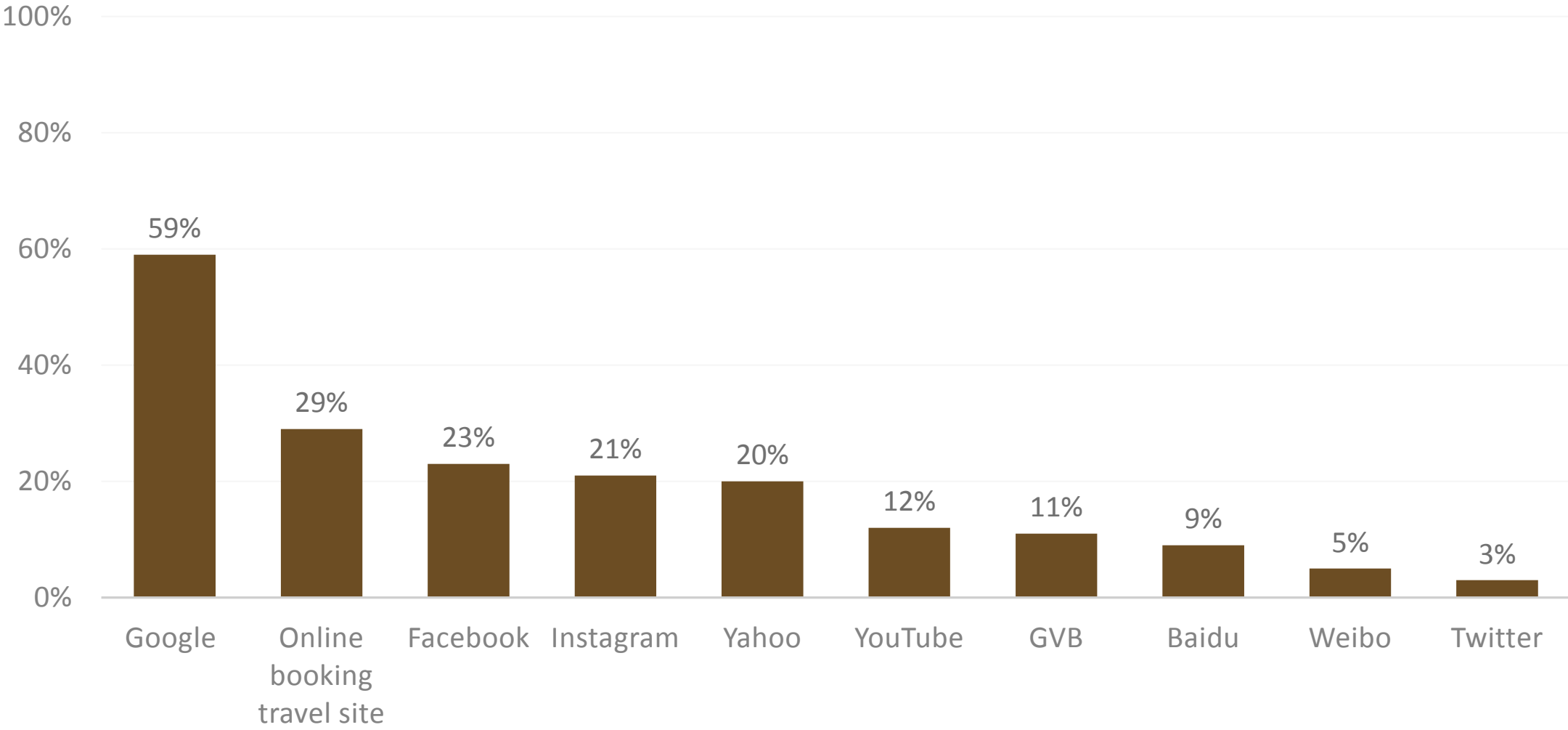
Q6 Please select the top three sources of information you used to find out about Guam while you were here

		TOTAL	FIT	FAMILY	HONEYMOON
		-	-	-	-
Q6	Internet/ Mobile App	52%	36%	62%	75%
	Hotel staff	49%	62%	45%	33%
	Restaurant staff (outside hotel)	19%	35%	18%	
	Social Media	18%	18%	20%	25%
	Local people	18%	17%	14%	8%
	Taxi drivers	13%	9%	10%	
	Guide books I brought with me	9%	9%	12%	17%
	Other visitors	8%	12%	7%	
	Tour staff	8%	3%	8%	17%
	Signs/ advertisement	7%	8%	9%	
	Guam Visitors Bureau	5%	4%	6%	8%
	Retail staff	4%	3%	5%	
	Local publication	2%	3%	2%	
	Visitors channel	1%	1%	2%	
	Total	424	116	175	12

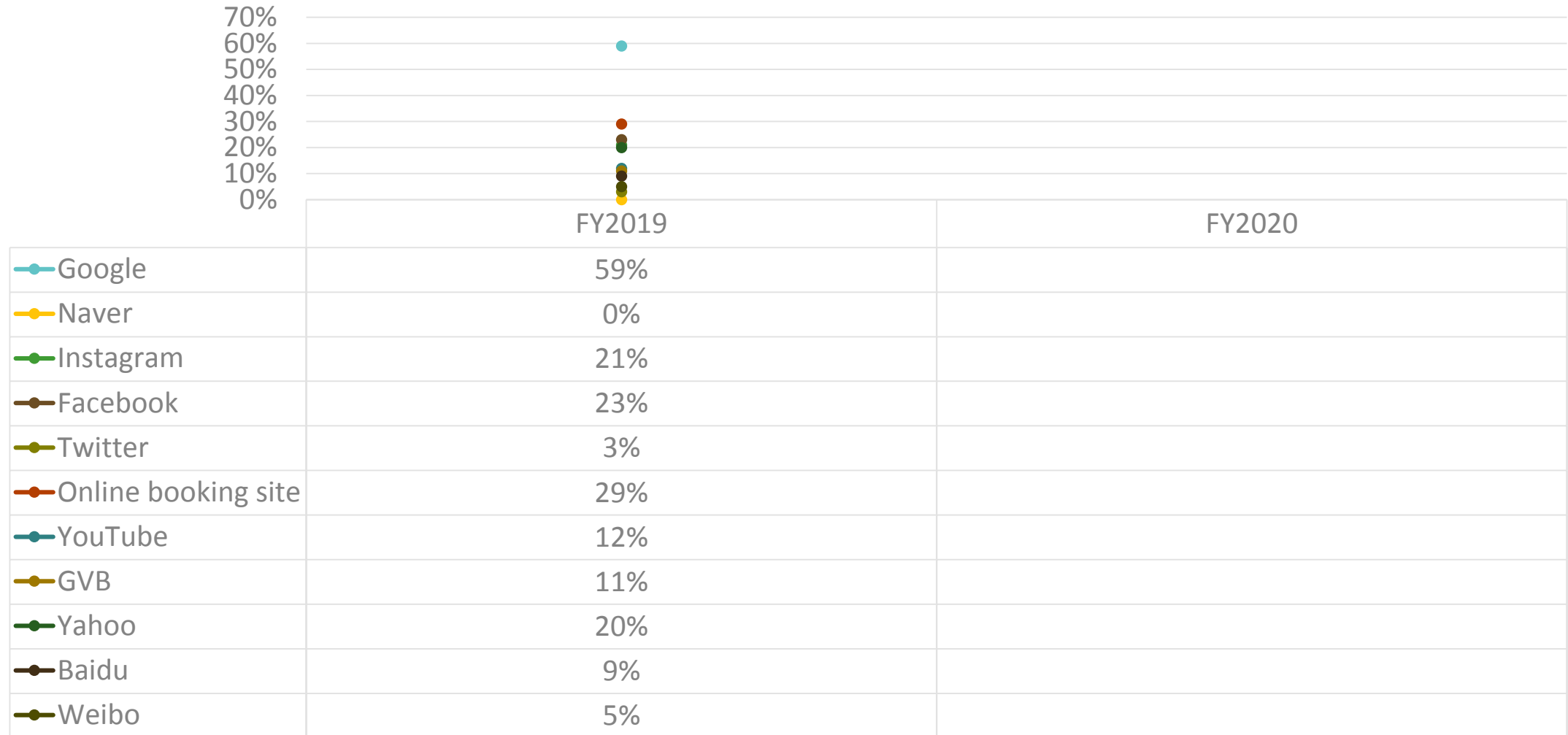
Prepared by Anthology Research



ONLINE SOURCES OF INFORMATION



ONLINE SOURCES OF INFORMATION

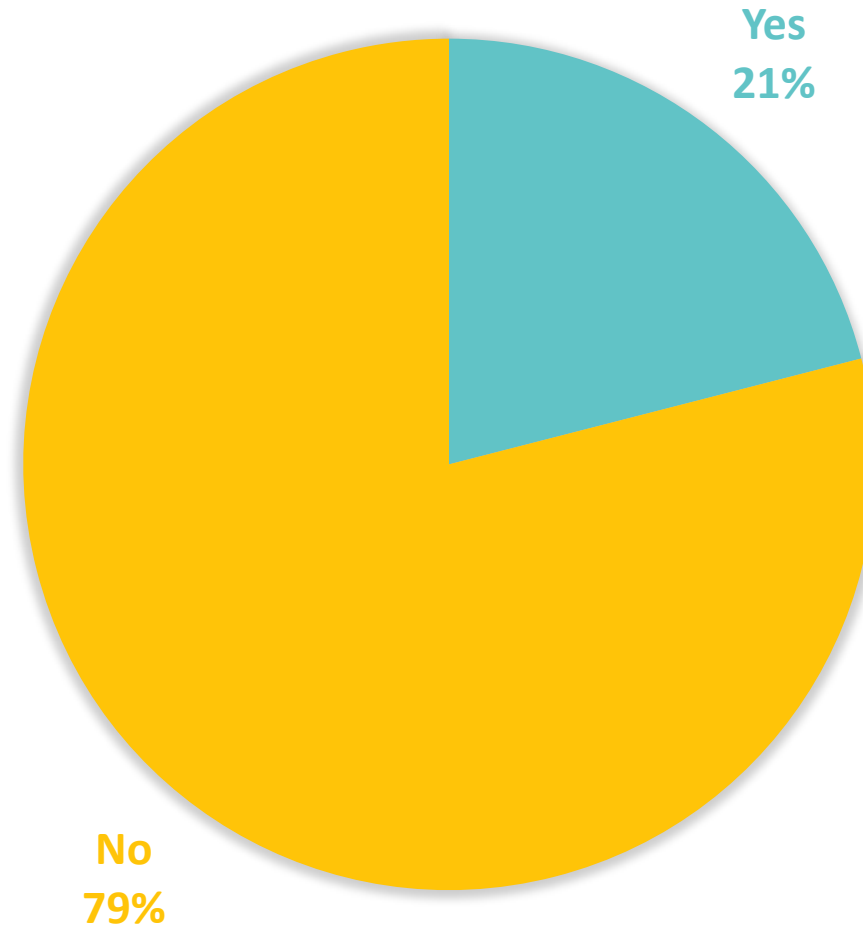




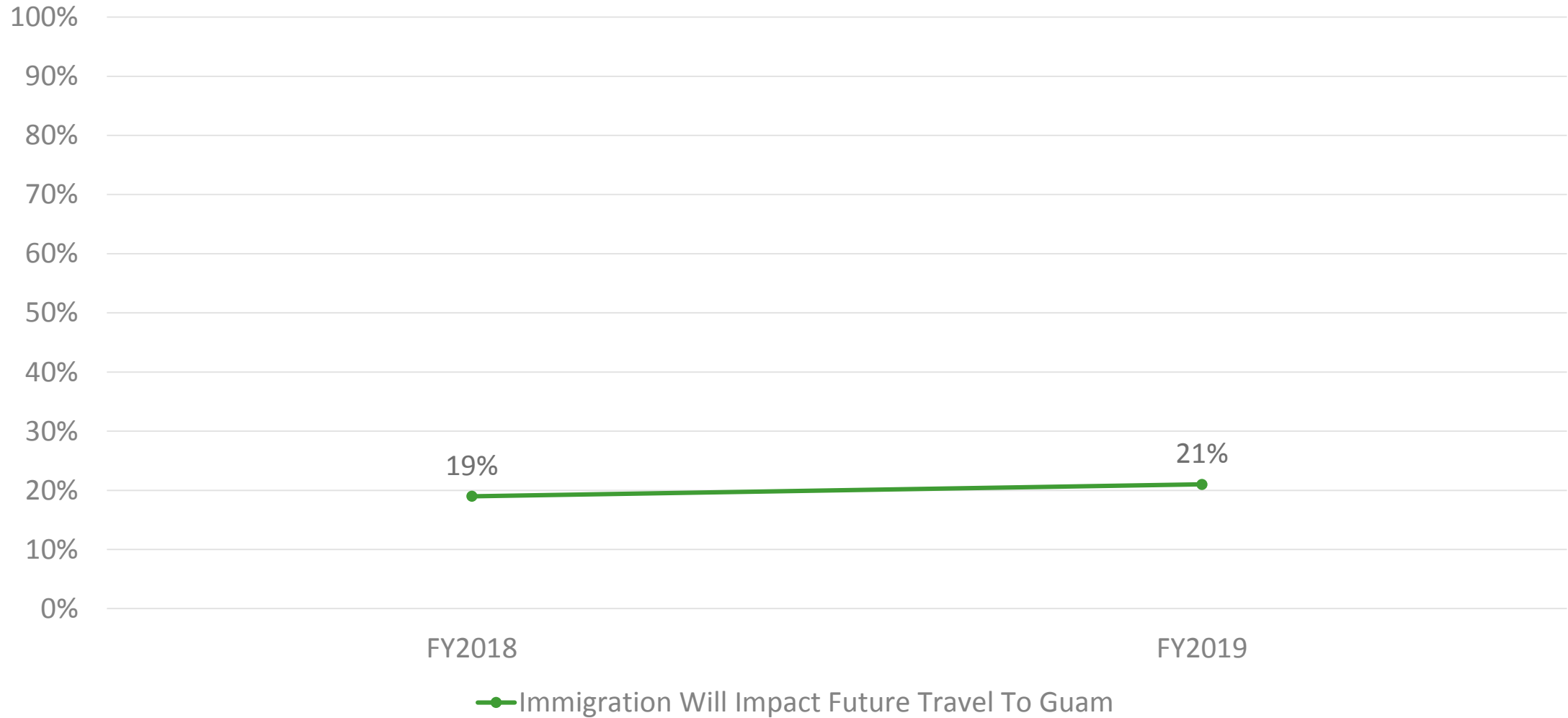
SECTION 7
IMMIGRATION



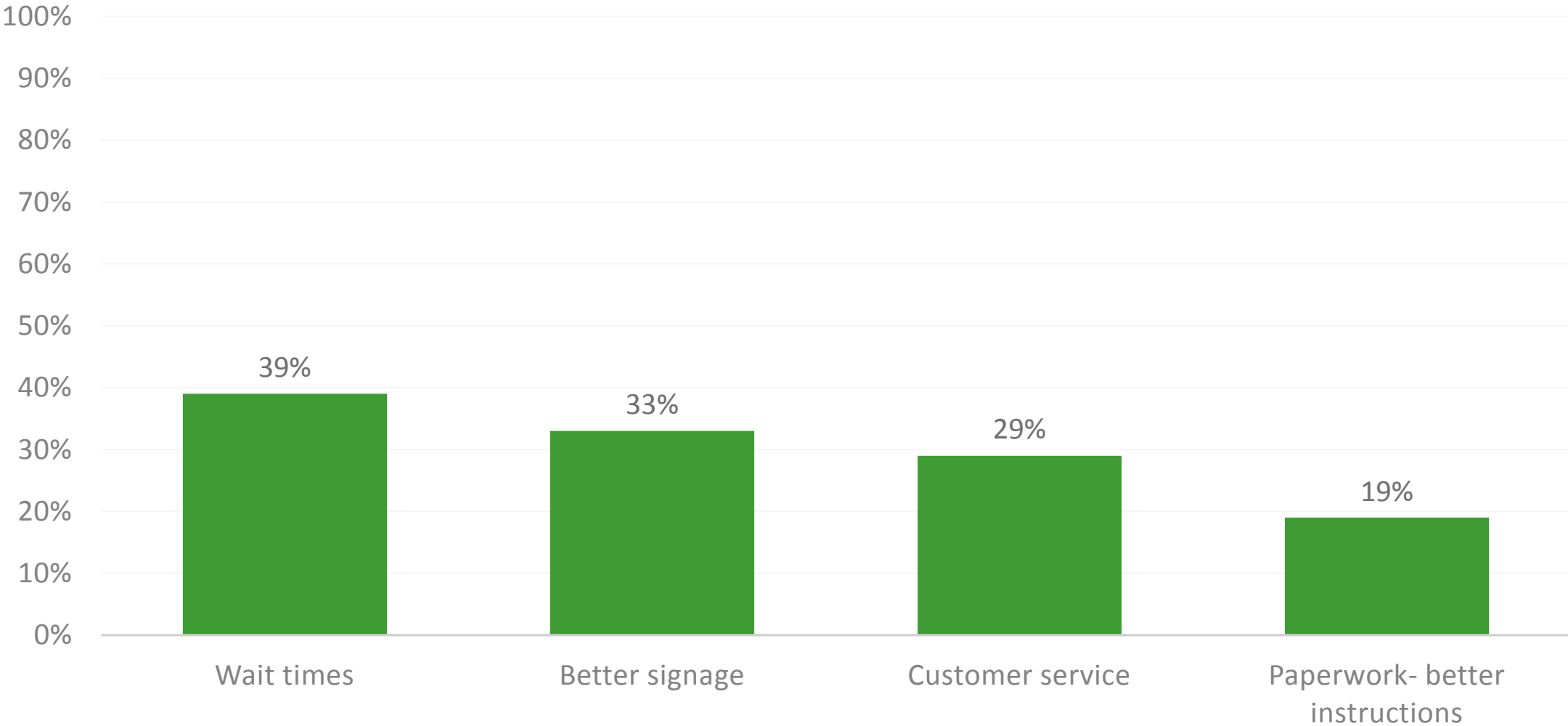
IMPACT OF AIRPORT IMMIGRATION SVC ON FUTURE TRAVEL TO GUAM



IMPACT OF AIRPORT IMMIGRATION SVC ON FUTURE TRAVEL TO GUAM



AIRPORT – SECURITY/ IMMIGRATION ISSUES



Q: What about the security screening and/ or immigration process here at the Guam International Airport could be improved?





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 ($p < .05$) 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, Recap 2019

Drivers:	2019 rank
Entertainment	3
Shopping	2
Dining	
Beaches	
Parks	
Roads	
Sightseeing Areas	4
Being a safe and secure destination	1
% of Overall Satisfaction Accounted For	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 four significant factors in the 2019 Period. By rank order they are:
 - **Being a safe & secure destination,**
 - **Shopping**
 - **Entertainment, and**
 - **Sightseeing areas.**
- With these factors the overall r^2 is .552 meaning that **55.2% of overall satisfaction is accounted for by these factors.**

DRIVERS – ONISLE EXPENDITURES

Comparison of Drivers of Per Person On Island Expenditures, Recap 2019	
Drivers:	2019 rank
Entertainment	
Shopping	
Dining	
Beaches	
Parks	
Roads	
Sightseeing Areas	
Being a safe and secure destination	
% of Overall Satisfaction Accounted For	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 factors in the 2019 Period.