# Guam Visitors Bureau

## Korean Visitor Tracker Exit Profile & Market Segmentation Report

### FY2017

### QTR.1 (OCTOBER - DECEMBER 2016)

Prepared by: Anthology Research

VISIT GUAM 2017 YEAR of LOVE

[ANTHOLOGY]
AnthologyGroup.com

GUAM VISITORS BUREAU
SETBISION BISITAN GUÅHAN | GUAM

# Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.

- A total of **1,054** departing Korean 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 **1,054** is +/- 3.02 percentage points with a 95% confidence level. That is, if all Korean 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 +/- 3.02 percentage points.

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# Objectives

- To monitor the effectiveness of the Korean seasonal campaigns in attracting Korean visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Korean marketing plan.

- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

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# Key Highlighted Segments

- **The specific objectives were:**

  - To determine the relative size and expenditure behavior of the following market segments:
    - Families (Q6)
    - FITS (Q7)
    - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)
    - Leisure Traveler (Q5A Here to relax/ Here to see beaches, tropical climate, here for pleasure)
    - Wedding (Q5A)
    - Honeymoon (Q5A)
    - Group Tour (Q7)
    - Repeat Visitor (Q3A)

  - To identify the most significant factors affecting overall visitor satisfaction.

  - To identify (for all Korean visitors) the most important determinants of on-island spending

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# Key Highlighted Segments
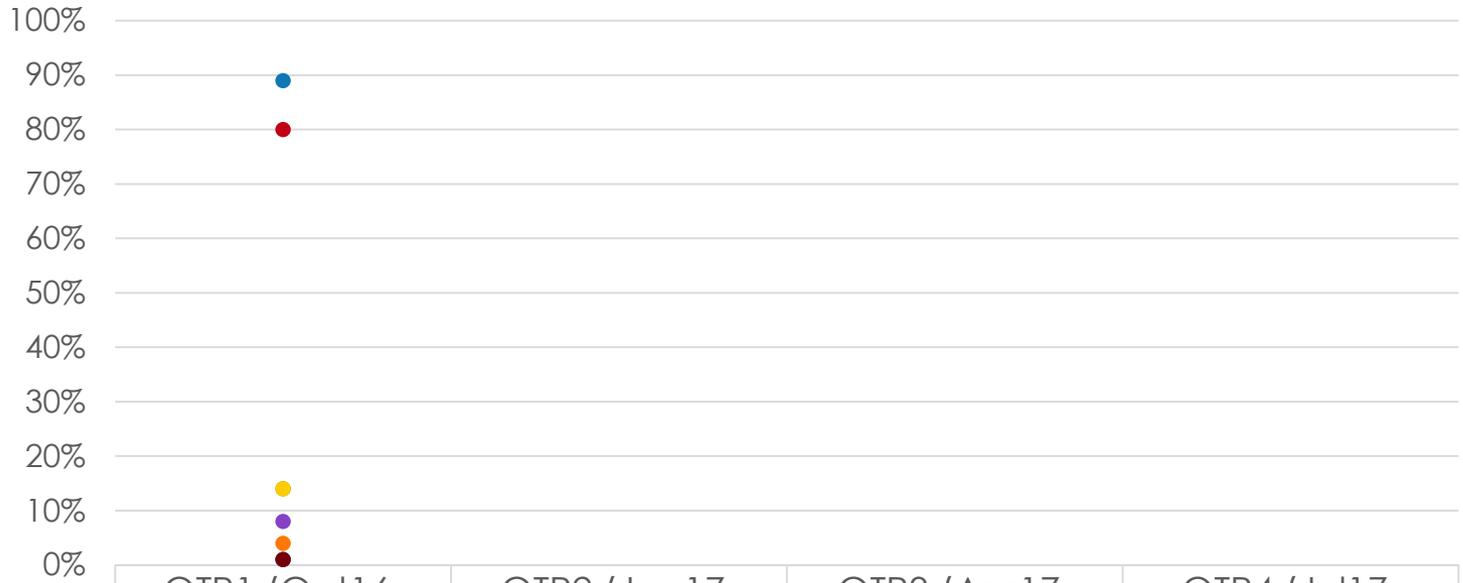


| | QTR1 (Oct16-Dec16) | QTR2 (Jan17-Mar17) | QTR3 (Apr17-Jun17) | QTR4 (Jul17-Sept17) |
|---|---|---|---|---|
| Leisure Traveler | 89% | | | |
| Family | 80% | | | |
| Repeat | 14% | | | |
| FIT | 14% | | | |
| Honey-moon | 8% | | | |
| MICE | 4% | | | |
| Wedding | 1% | | | |
| Group | 1% | | | |

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# SECTION 1
# PROFILE OF RESPONDENTS

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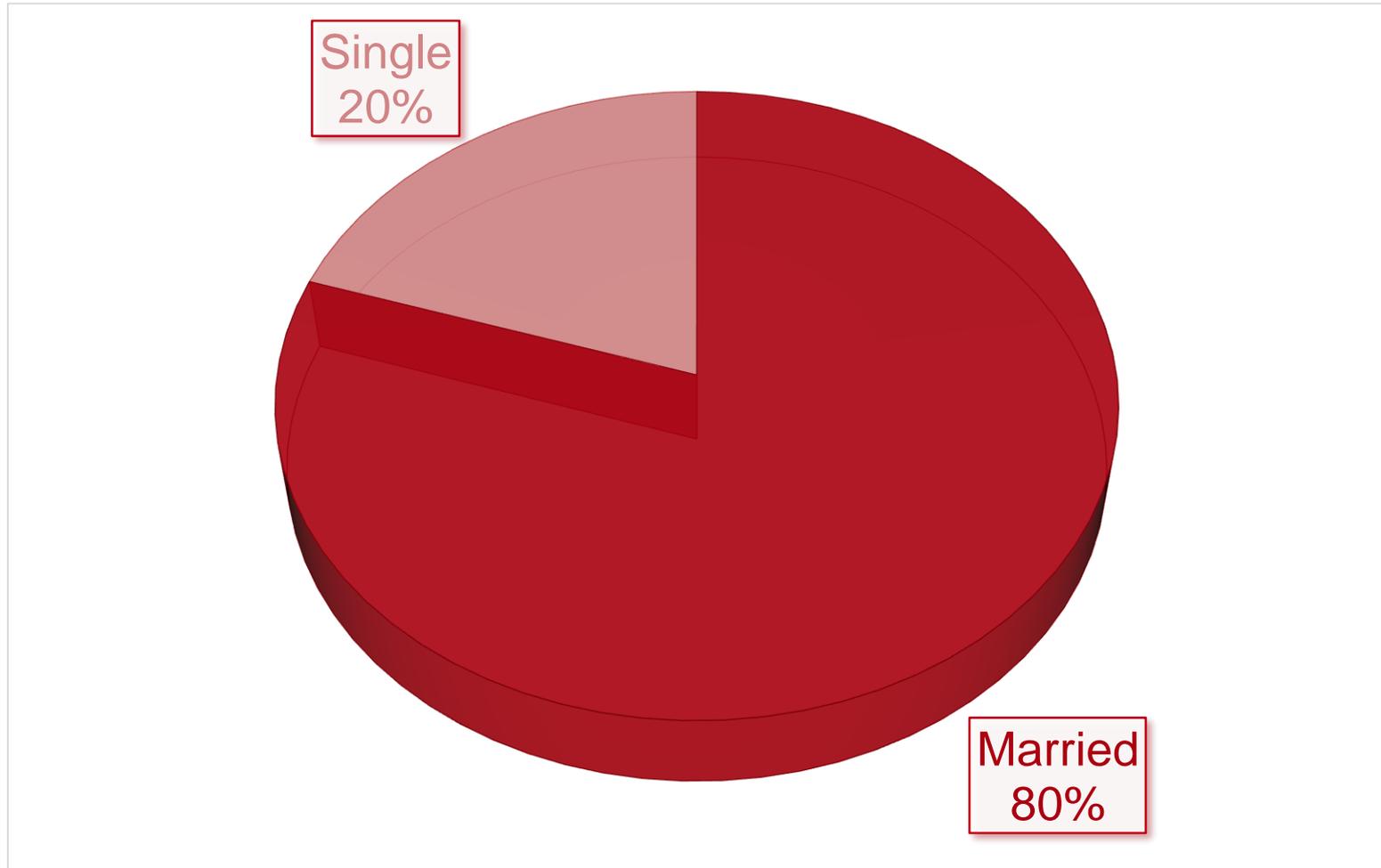
# Marital Status

# Marital status – FY2017 Tracking

# Marital status – Key Segments

**GUAM VISITORS BUREAU - EXIT SURVEY**

**QE  Are you married or single?**

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| QE | Married | 80% | 70% | 71% | 96% | 100% | 80% | 94% | 71% | 83% |
| | Single | 20% | 30% | 29% | 4% | | 20% | 6% | 29% | 17% |
| | Total | 1054 | 148 | 42 | 89 | 6 | 942 | 840 | 7 | 152 |

Prepared by QMark Research

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# Age



MEAN = 36.15
MEDIAN = 35

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# Age – FY2017 Tracking

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | 36.15 | | | |
| MEDIAN | 35 | | | |

[A]
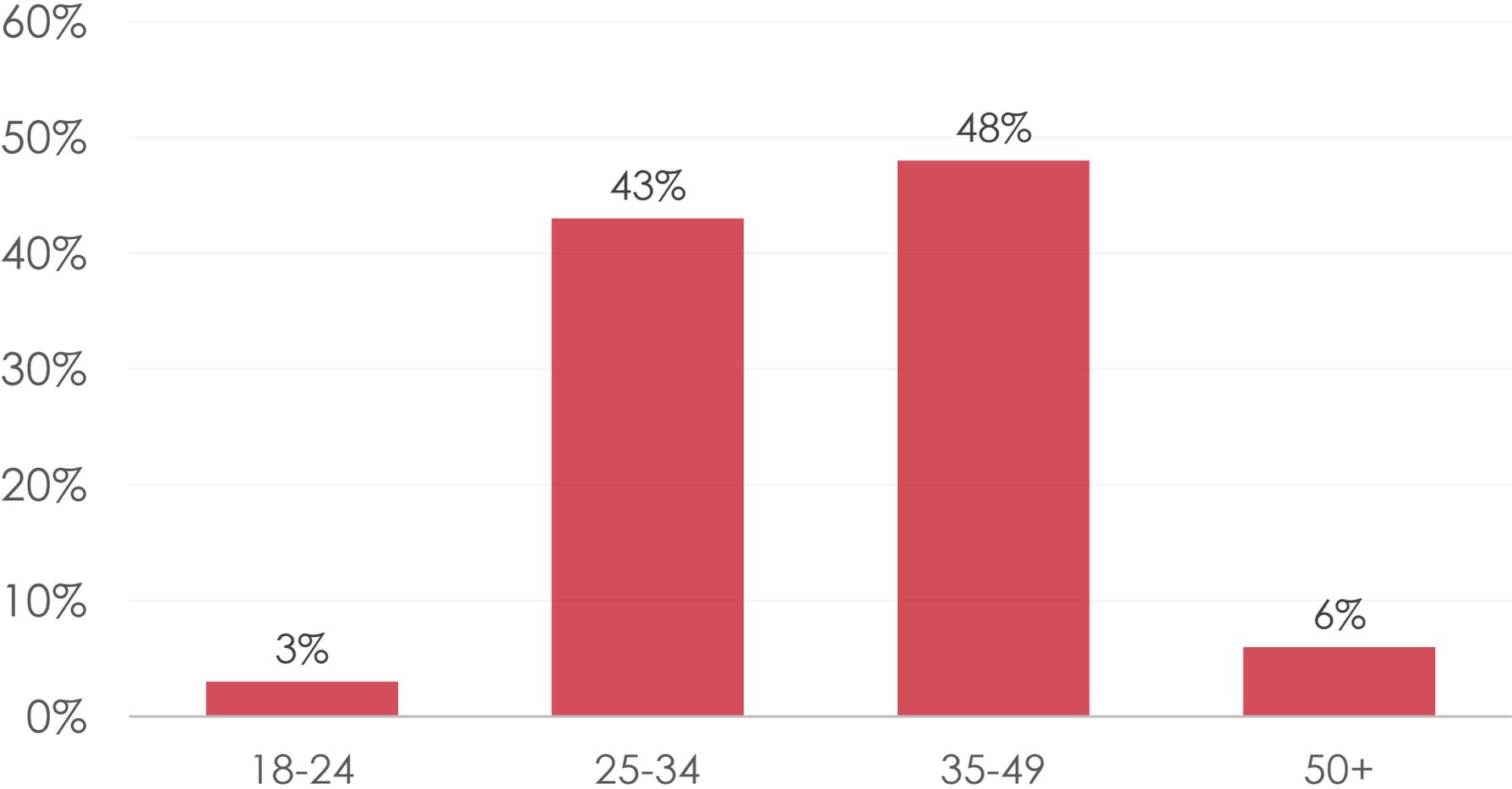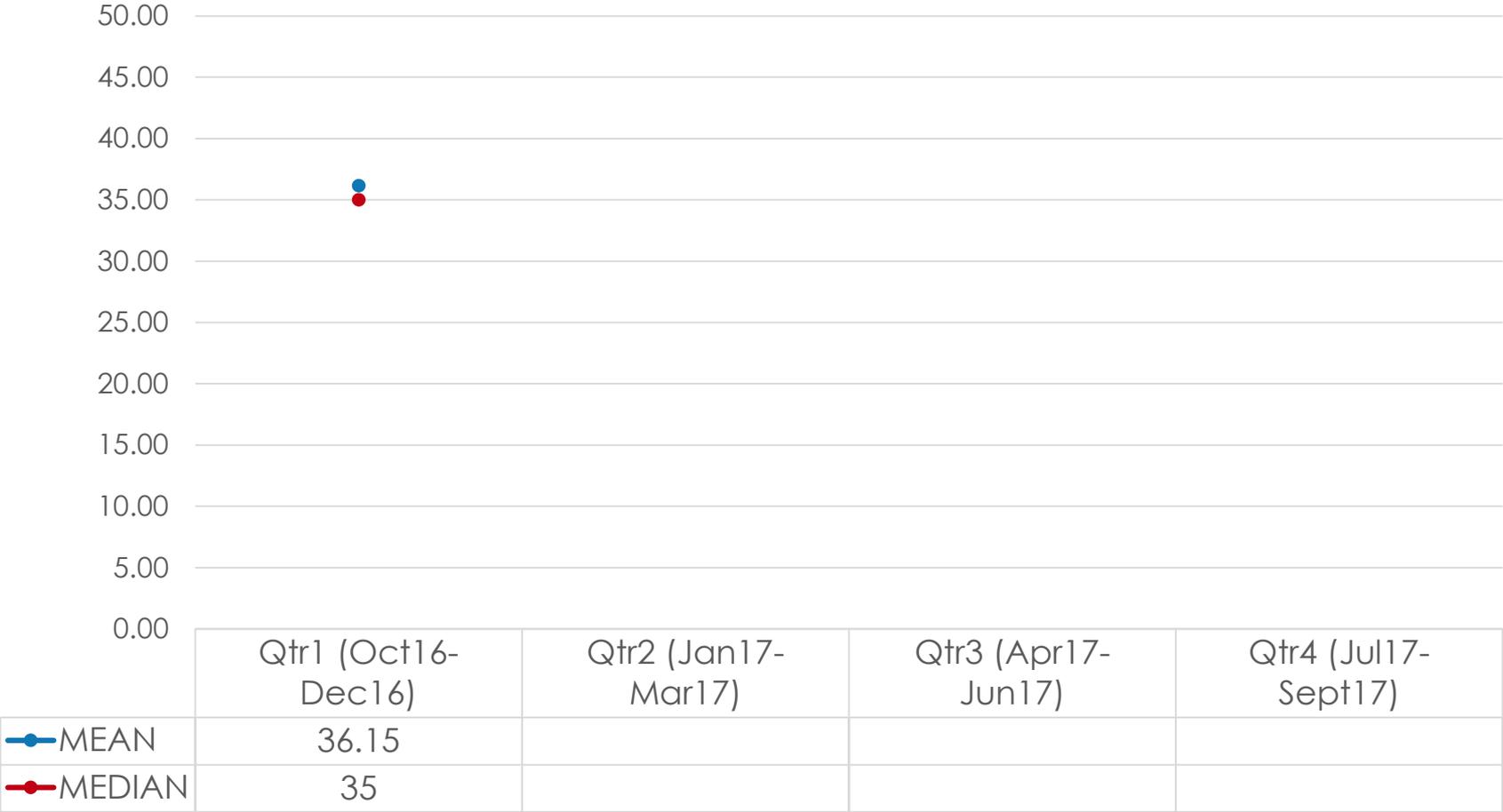
# Age – Key Segments

**GUAM VISITORS BUREAU - EXIT SURVEY**

**QF  And what was your age on your last birthday?**

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| QF | 18-24 | 3% | 3% | 7% | 1% | | 3% | 1% | | 3% |
| | 25-34 | 43% | 53% | 29% | 82% | 50% | 43% | 38% | 14% | 32% |
| | 35-49 | 48% | 39% | 50% | 15% | 33% | 49% | 55% | 43% | 61% |
| | 50+ | 6% | 5% | 14% | 2% | 17% | 6% | 5% | 43% | 5% |
| | Total | 1053 | 148 | 42 | 89 | 6 | 941 | 839 | 7 | 152 |
| QF | Mean | 36.15 | 34.37 | 39.88 | 31.43 | 35.67 | 36.11 | 37.02 | 45.43 | 37.38 |
| | Median | 35 | 34 | 43 | 30 | 33 | 35 | 36 | 40 | 37 |

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# Annual Household Income
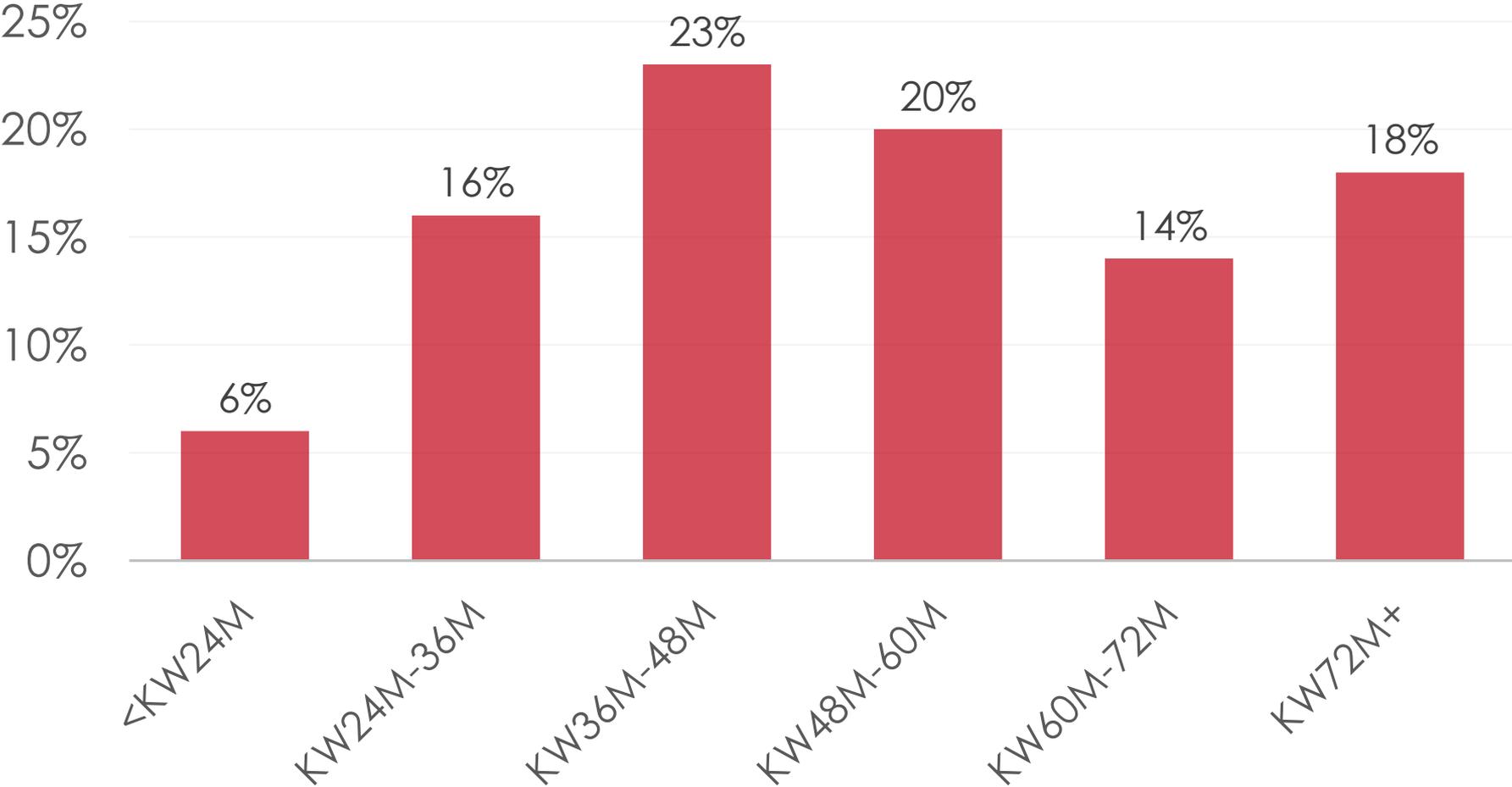
# Annual Household Income
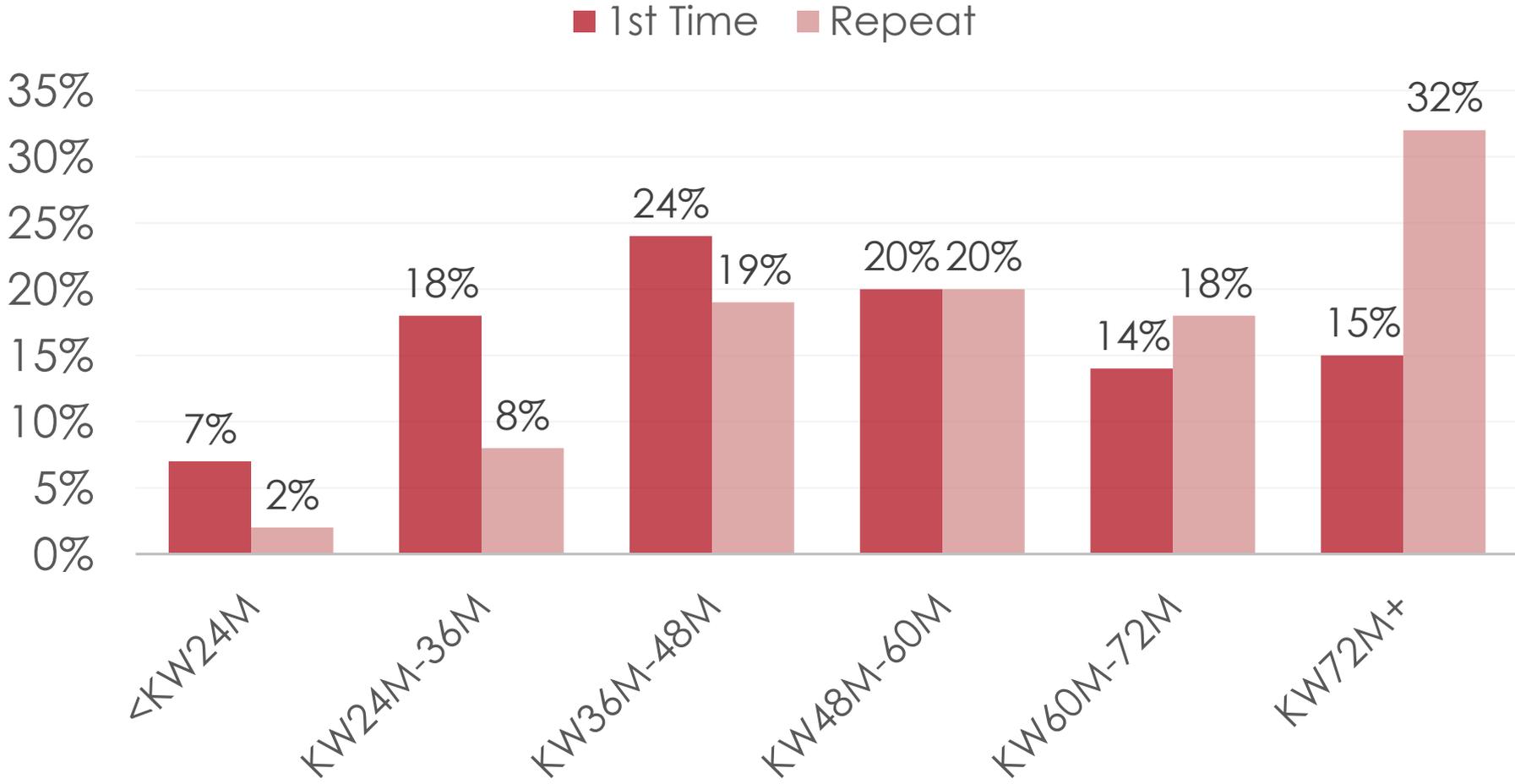
# Annual Household Income – Key Segments

**Q26 What is your approximate annual household income before taxes?**

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| Q26 | <KW12.0M | 1% | 2% | | 3% | | 1% | 1% | 17% | |
| | KW12.0M-KW24.0M | 5% | 5% | | 9% | | 5% | 2% | | 2% |
| | KW24.0M-KW36.0M | 16% | 19% | 14% | 30% | 25% | 17% | 13% | | 8% |
| | KW36.0M-KW48.0M | 23% | 21% | 8% | 34% | 50% | 23% | 25% | 17% | 19% |
| | KW48.0M-KW60.0M | 20% | 15% | 14% | 9% | | 20% | 22% | 17% | 20% |
| | KW60.0M-KW72.0M | 14% | 19% | 24% | 8% | | 15% | 16% | 17% | 18% |
| | KW72.0M+ | 18% | 18% | 32% | 4% | 25% | 17% | 18% | 17% | 32% |
| | No Income | 2% | 1% | 8% | 4% | | 2% | 2% | 17% | 2% |
| | Total | 941 | 131 | 37 | 77 | 4 | 839 | 748 | 6 | 131 |

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# Travel Party

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# Travel Party - Children

| Age Group | Percentage |
|-----------|-----------|
| 0-2 Years old | 25% |
| 3-6 Years old | 38% |
| 7-11 Years old | 46% |
| 12-18 Years old | 19% |

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# Trips to Guam



Repeat
14%

First time
86%

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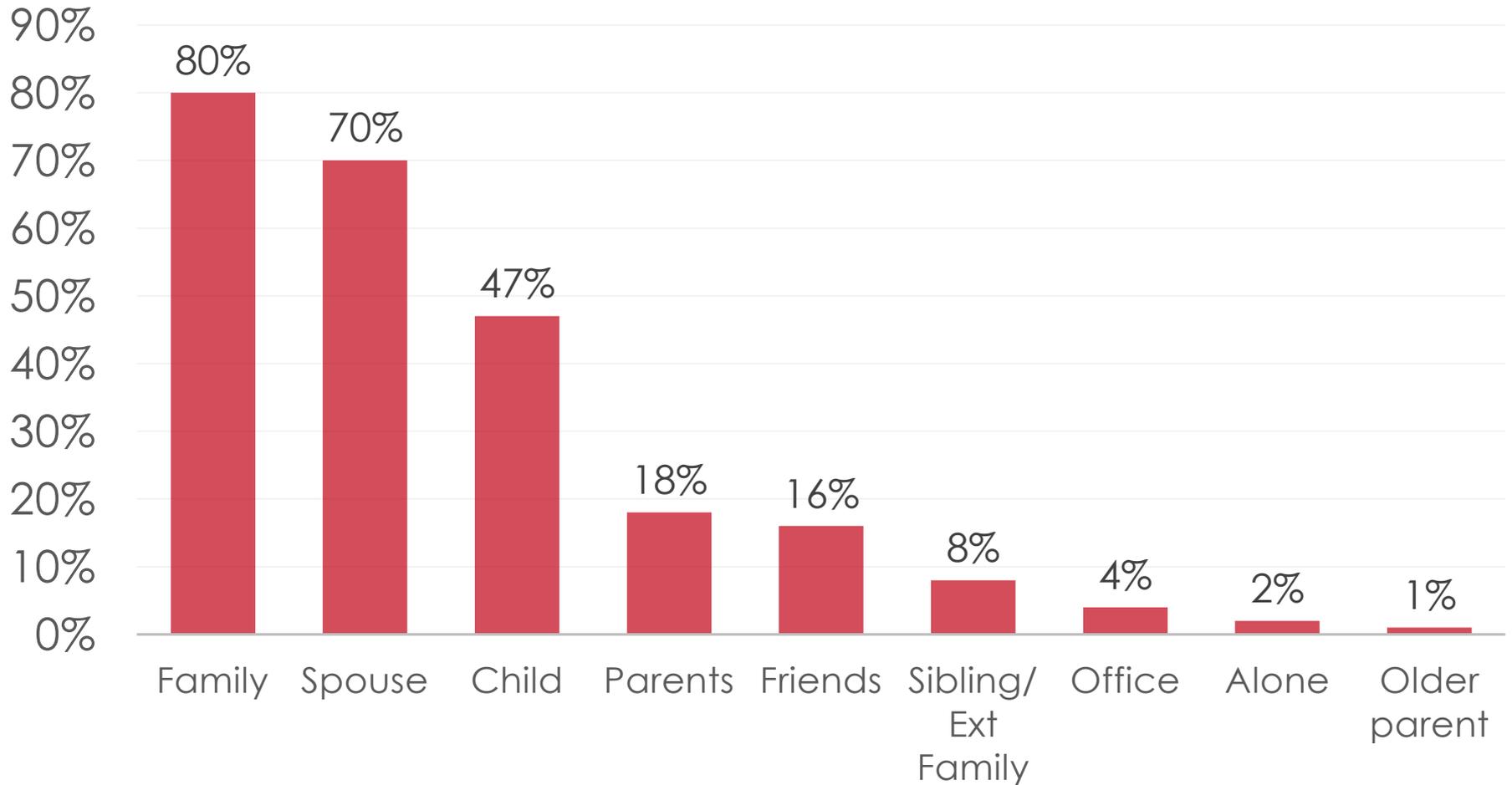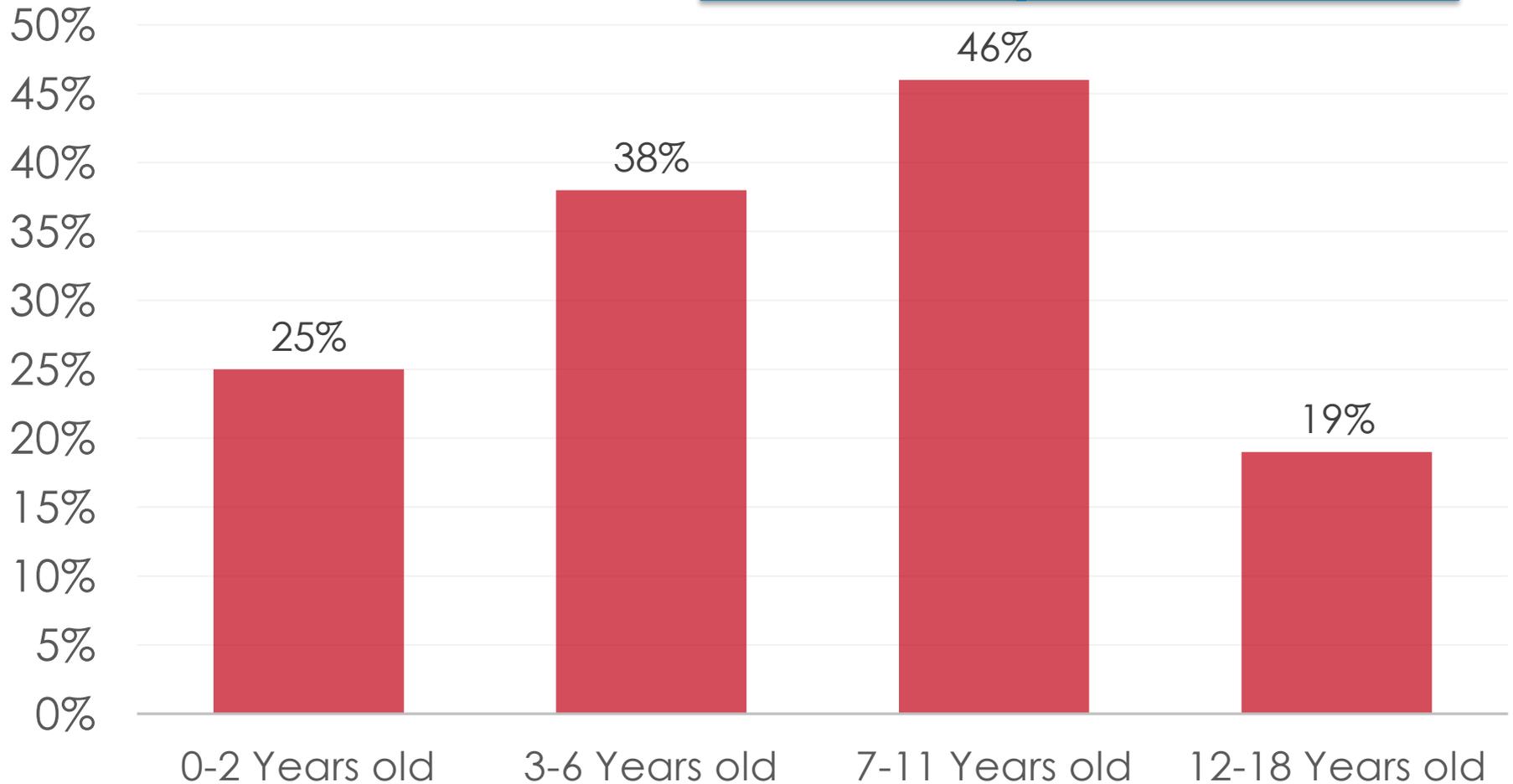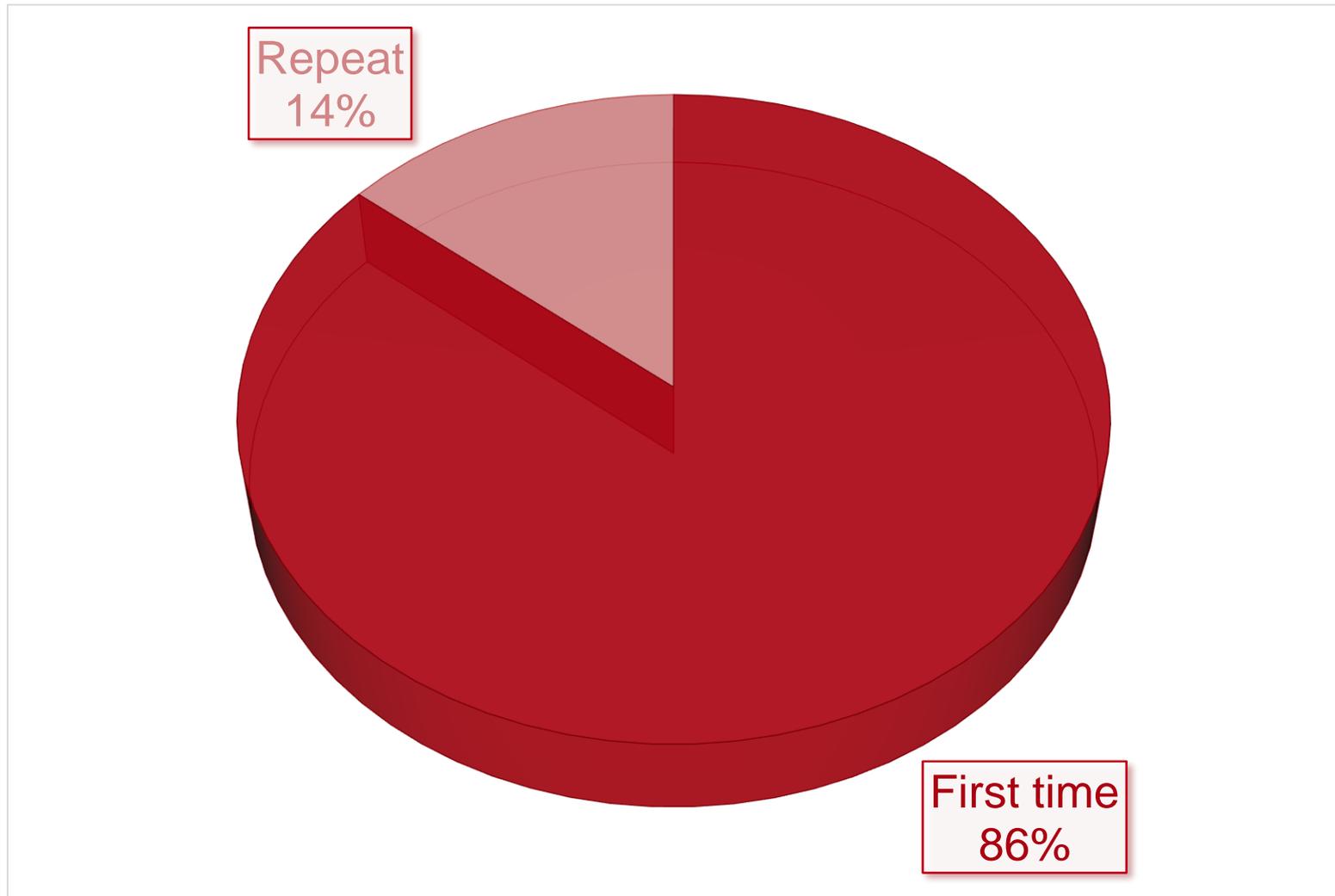
# Trips to Guam – FY2017 Tracking
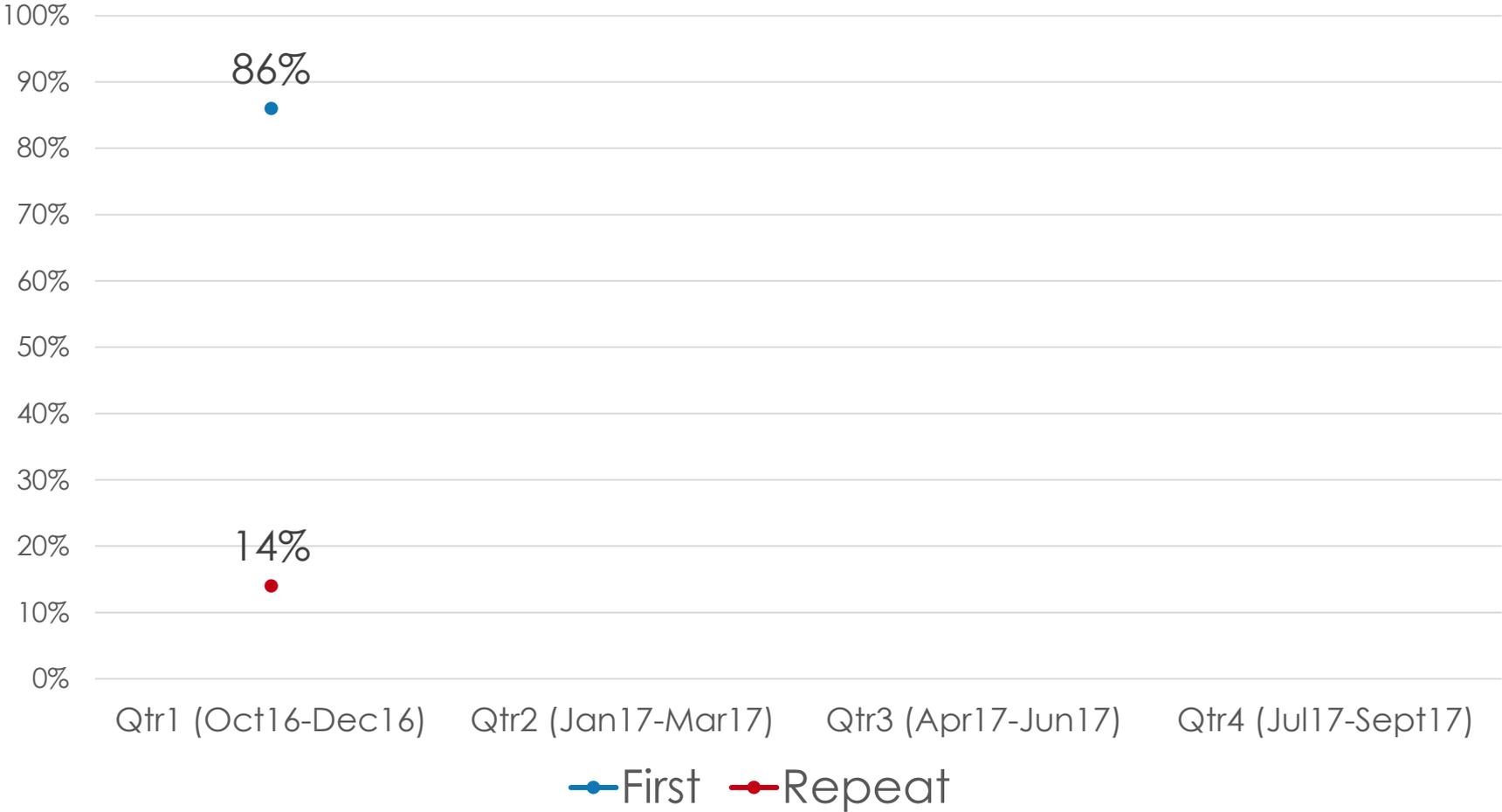
# Trips to Guam – Key Segments

**GUAM VISITORS BUREAU - EXIT SURVEY**

**Q3A  Is this your first trip to Guam?**

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| Q3A | Yes | 86% | 79% | 86% | 97% | 100% | 87% | 86% | 86% | |
| | No | 14% | 21% | 14% | 3% | | 13% | 14% | 14% | 100% |
| | Total | 1054 | 148 | 42 | 89 | 6 | 942 | 840 | 7 | 152 |

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# Repeat Visitor- Most Recent Trip

N = 131
MEAN NUMBER OF TRIPS = 2.47
MEDIAN NUMBER OF TRIPS = 2



| | Within the last year | One to two years ago | More than two years |
|---|---|---|---|
| | 42% | 18% | 40% |

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# Length of Stay

| | One to two nights | Three nights | Four or more nights |
|---|---|---|---|
| | 1% | 56% | 44% |

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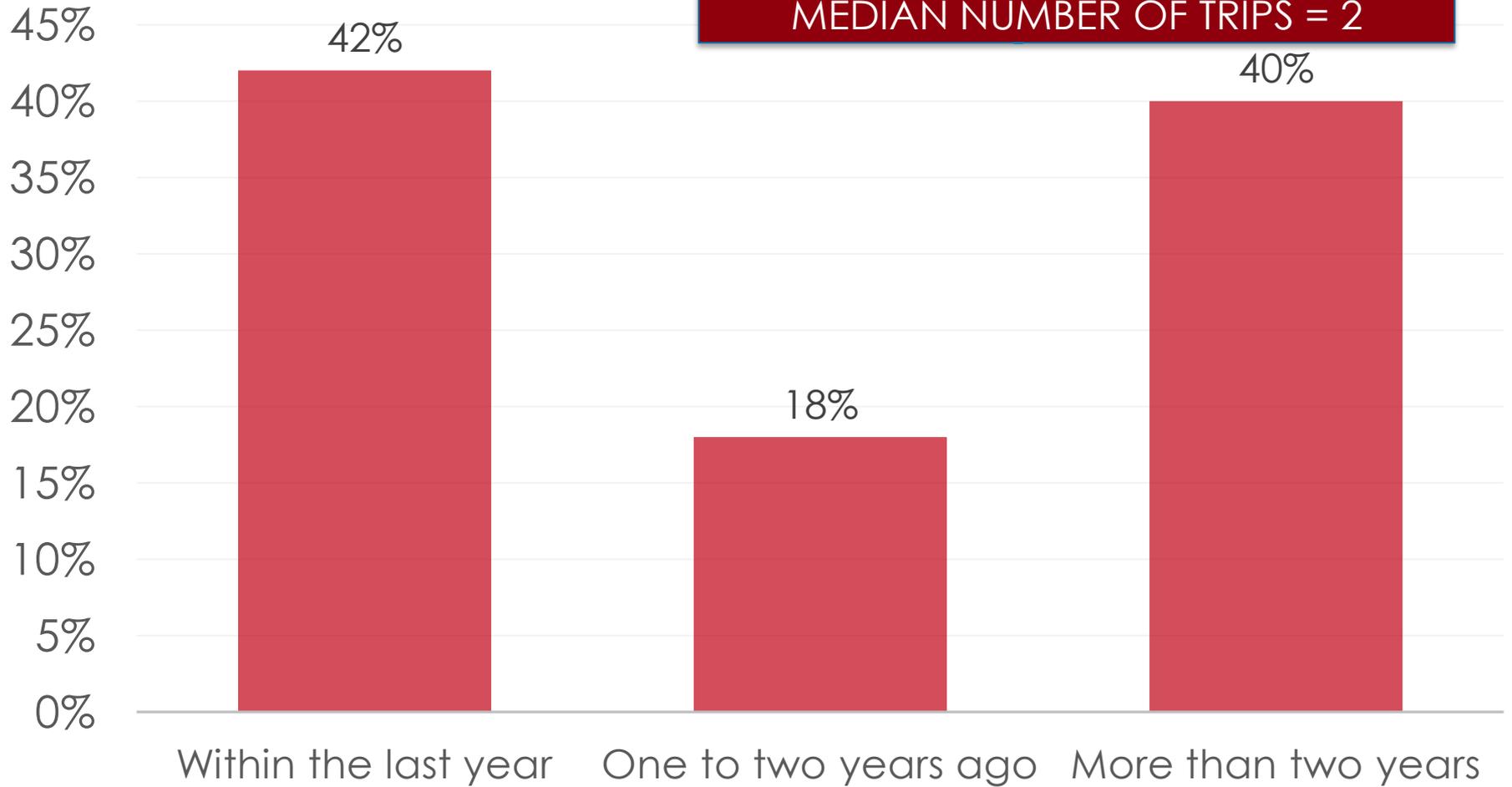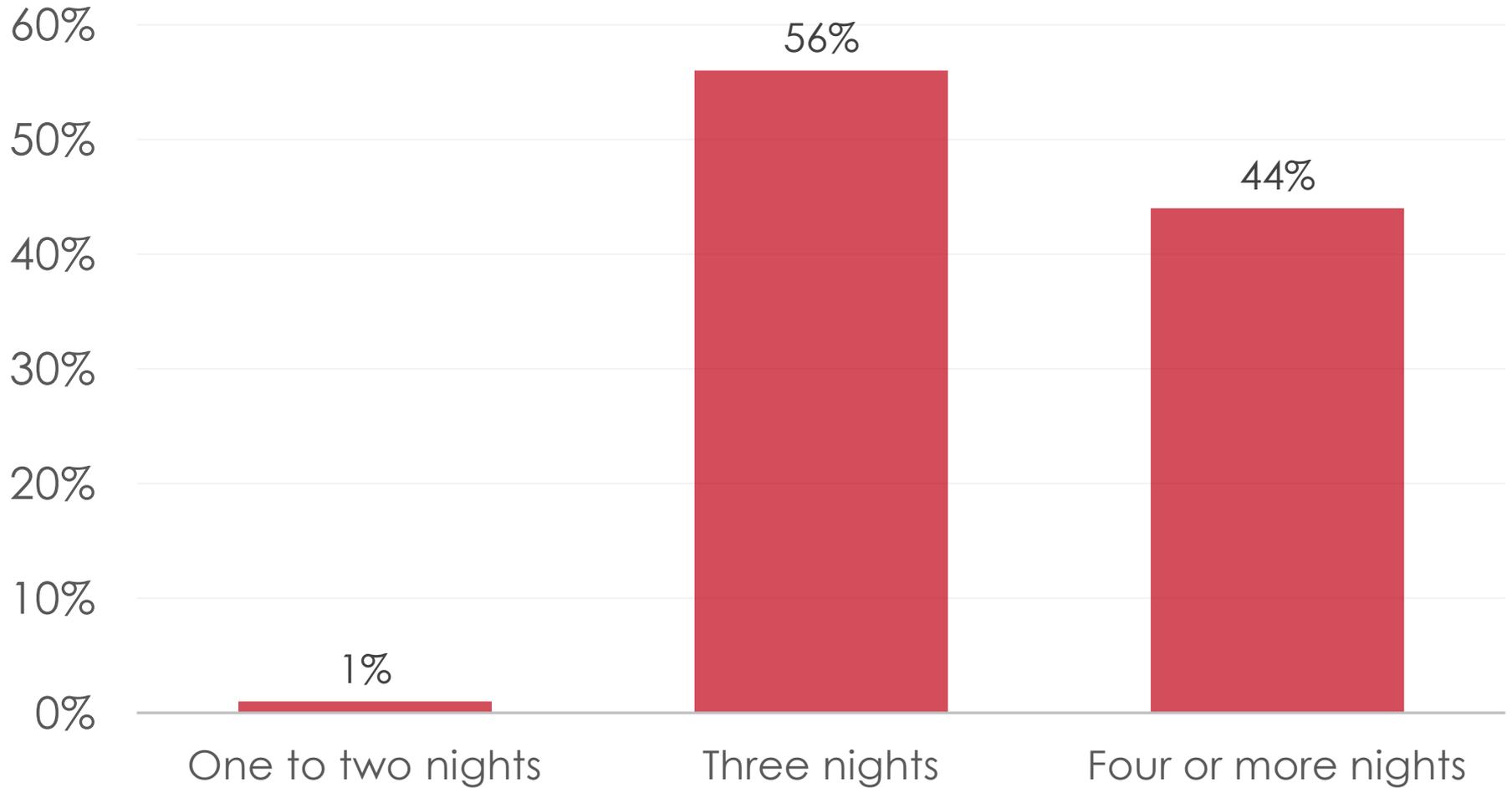
# Length of Stay – FY2017 Tracking



| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | 3.59 | | | |
| MEDIAN | 3 | | | |

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# Length of Stay – Key Segments

**GUAM VISITORS BUREAU - EXIT SURVEY**

**Q8  How many nights did you stay on Guam?**

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| Q8 | 1-2 | 1% | 1% | | | | 0% | 0% | | 3% |
| | 3 | 56% | 42% | 85% | 25% | 20% | 56% | 52% | 29% | 55% |
| | 4+ | 44% | 57% | 15% | 75% | 80% | 44% | 47% | 71% | 42% |
| | Total | 1035 | 142 | 41 | 89 | 5 | 926 | 825 | 7 | 146 |
| Q8 | Mean | 3.59 | 3.97 | 3.20 | 4.19 | 4.20 | 3.60 | 3.66 | 3.86 | 3.69 |
| | Median | 3 | 4 | 3 | 4 | 4 | 3 | 3 | 4 | 3 |

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# Occupation – Top Responses (10%+)



Bar chart showing top occupation responses:
- Office Worker: 41%
- Self-employed: 17%
- Housewife: 11%
- Professional/Tech/Specialist: 10%

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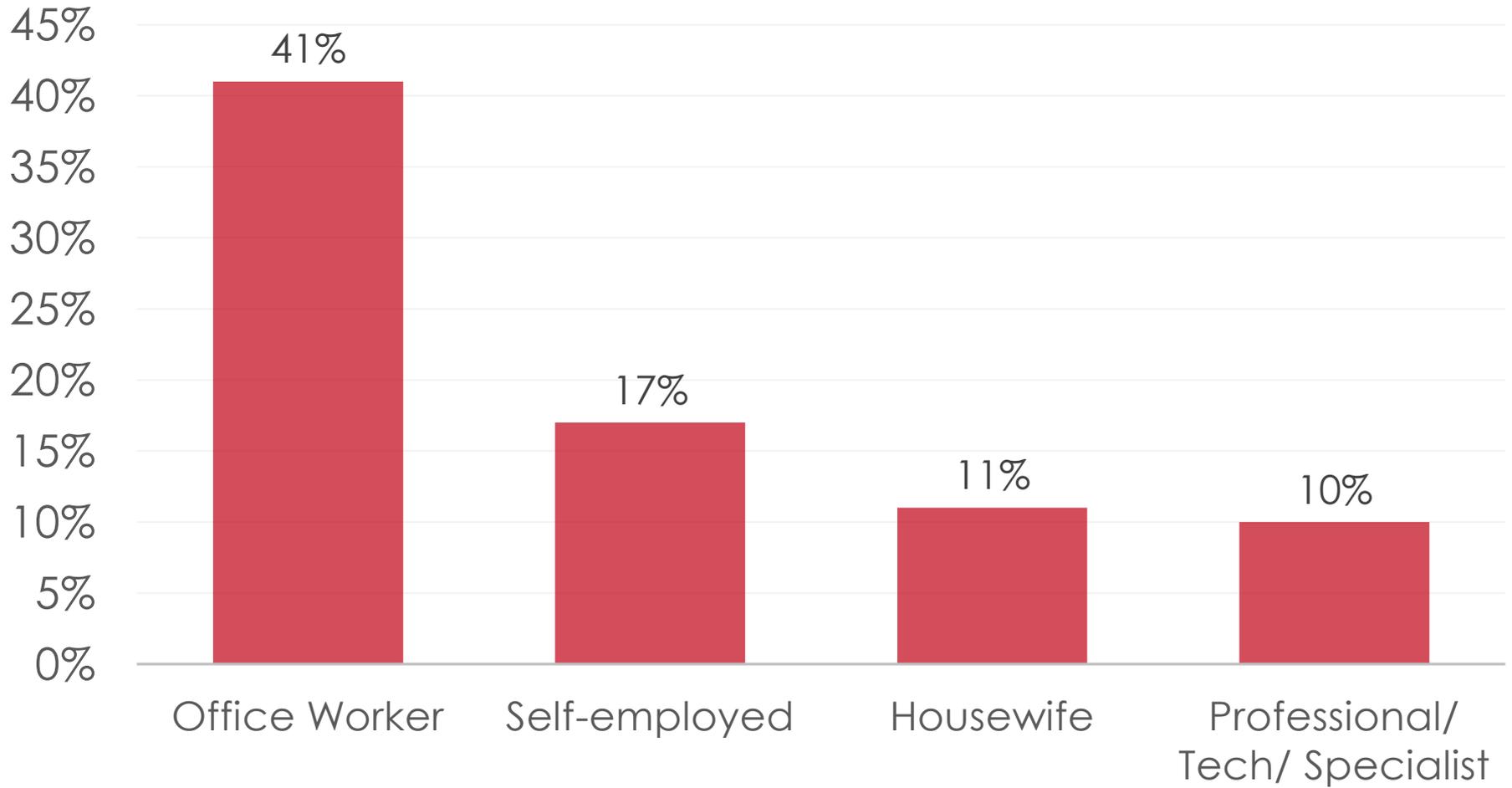
# SECTION 2
# TRAVEL PLANNING

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# Travel Planning

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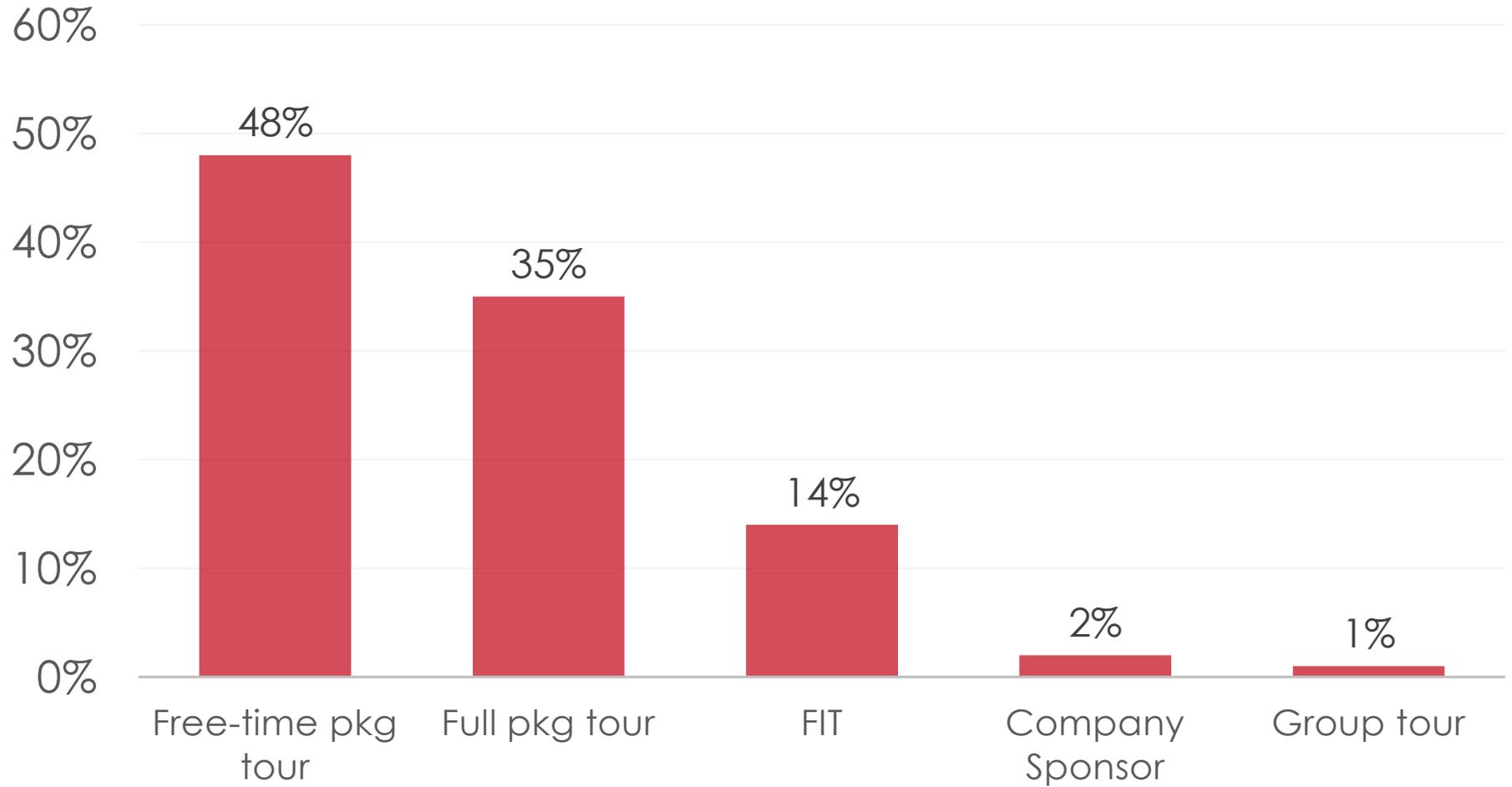
# Travel Planning – FY2017 Tracking



| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| Free-time pkg tour | 48% | | | |
| Full pkg tour | 35% | | | |
| FIT | 14% | | | |
| Company | 2% | | | |
| Group | 1% | | | |

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# Travel Planning – Key Segments

**GUAM VISITORS BUREAU - EXIT SURVEY**

**Q7 Please describe your travel arrangements to Guam?**

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| Q7 | Free-time package tour | 48% | | 10% | 47% | 33% | 47% | 46% | | 56% |
| | Full package tour | 35% | | 56% | 37% | 33% | 37% | 39% | | 21% |
| | Individually arranged travel (FIT) | 14% | 100% | 5% | 16% | 33% | 14% | 14% | | 21% |
| | Company paid travel | 2% | | 27% | | | 1% | 0% | | 1% |
| | Group tour | 1% | | 2% | | | 1% | 1% | 100% | 1% |
| | Other | 0% | | | | | | 0% | | 1% |
| | Total | 1046 | 148 | 41 | 89 | 6 | 935 | 835 | 7 | 151 |

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# Accommodations (Top Responses)



Chart legend: Stayed At | Length of Stay

| Accommodation | Stayed At | Length of Stay |
|---|---|---|
| PIC Club | 30% | 3.49 |
| Hyatt Regency Guam | 9% | 3.40 |
| Hotel Nikko Guam | 7% | 3.43 |
| Onward Beach Resort | 6% | 3.66 |
| Dusit Thani Guam Resort | 6% | 3.54 |
| Lotte Hotel Guam | 6% | 3.79 |
| Hilton Guam Resort | 5% | 3.87 |
| Outrigger | 5% | 3.69 |

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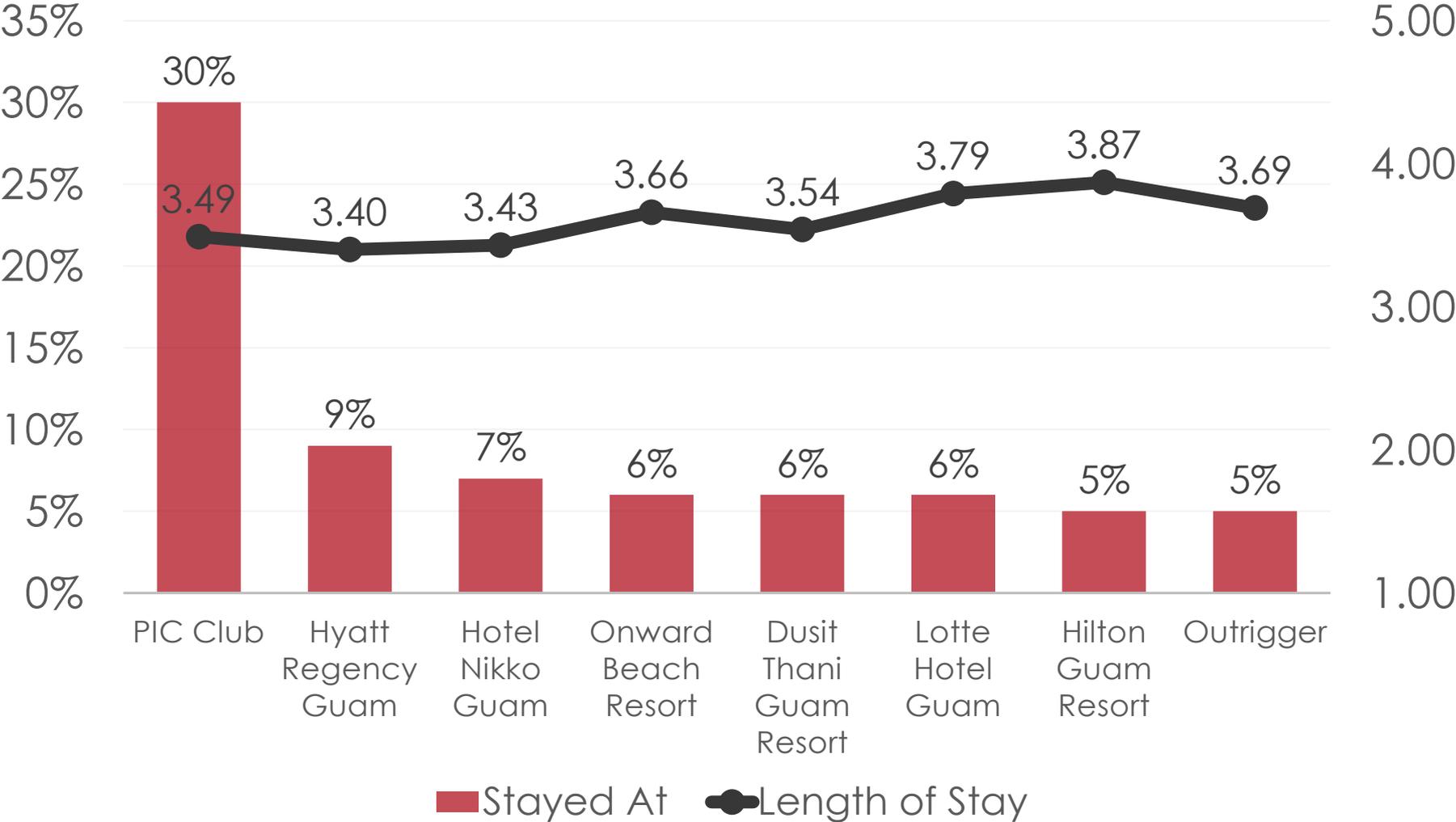
# Travel Motivation (Top Responses)



| Motivation | Percentage |
|---|---|
| Natural beauty | 63% |
| Relax | 60% |
| Recommendation | 30% |
| Short travel time | 28% |
| Safe | 27% |
| Shopping | 24% |
| Pleasure | 16% |
| Water sports | 13% |
| Price | 9% |
| Honeymoon | 8% |

[A]
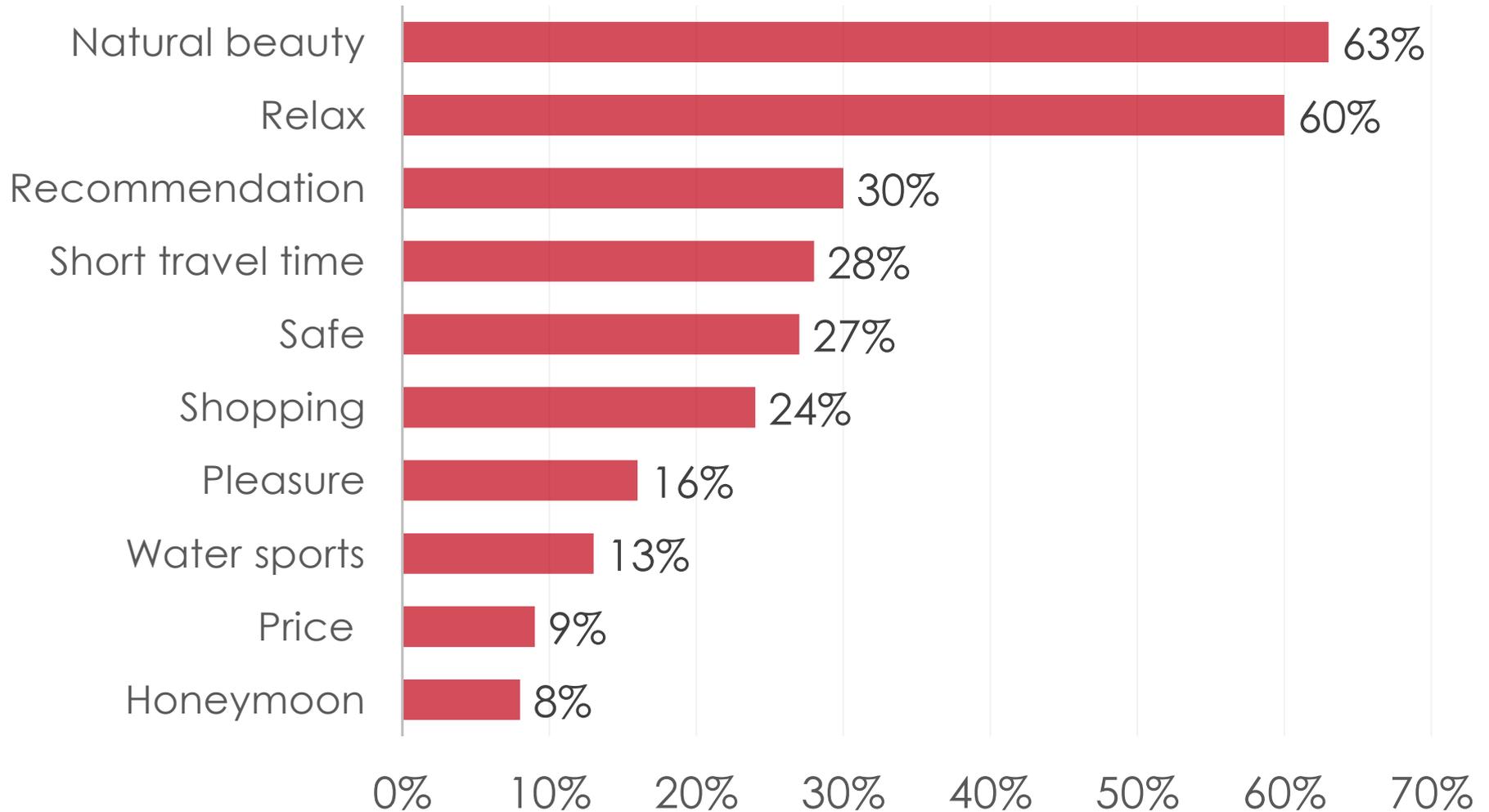
# Travel Motivation – Key Segments

**GUAM VISITORS BUREAU - EXIT SURVEY**

**Q5A  Please select the top 3 reasons that motivated you to travel to Guam?**

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| Q5A | Natural beauty | 63% | 67% | 55% | 46% | 17% | 70% | 62% | 43% | 50% |
| | Relax | 60% | 60% | 48% | 47% | 67% | 67% | 63% | 71% | 48% |
| | Recomm-friend/family/trvl agnt | 30% | 22% | 19% | 15% | | 28% | 29% | | 11% |
| | Short travel time | 28% | 39% | 19% | 24% | 50% | 26% | 29% | | 28% |
| | Safe | 27% | 22% | 12% | 16% | 33% | 26% | 28% | | 29% |
| | Shopping | 24% | 33% | 10% | 28% | | 24% | 25% | 29% | 33% |
| | Pleasure | 16% | 8% | 5% | 19% | | 18% | 16% | | 19% |
| | Water sports | 13% | 14% | 10% | 3% | | 12% | 13% | | 8% |
| | Price | 9% | 6% | 2% | 6% | | 8% | 9% | | 9% |
| | Honeymoon | 8% | 10% | | 100% | 50% | 8% | 10% | | 2% |
| | Previous trip | 7% | 11% | 5% | | | 6% | 8% | | 51% |
| | Visit friends/ Relatives | 5% | 3% | | 3% | | 4% | 4% | 14% | 5% |
| | Company Sponsored | 4% | 1% | 95% | | | 4% | 2% | 14% | 4% |
| | Scuba | 2% | 3% | 2% | 2% | | 2% | 2% | 29% | 3% |
| | Other | 2% | 2% | | 1% | | 2% | 2% | | 3% |
| | Company/ Business Trip | 2% | 1% | 10% | | | 1% | 1% | | 2% |
| | Golf | 1% | 1% | 2% | 1% | | 1% | 1% | 14% | 2% |
| | Career Cert/ Testing | 1% | 3% | | 1% | | 1% | 0% | | 3% |
| | Organized sports | 1% | 1% | | 1% | | 1% | 1% | 14% | |
| | Married/ Attn wedding | 1% | 1% | | 3% | 100% | 1% | 1% | | |
| | Convention/ Trade/ Conference | 0% | | 5% | | | 0% | 0% | | |
| | Total | 1048 | 147 | 42 | 89 | 6 | 942 | 837 | 7 | 151 |

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# SECTION 3
# EXPENDITURES

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# **Prepaid Expenditures**

- $1,953.30 = overall mean average prepaid expense (for entire travel party size) by respondent


- $674.62 = overall mean average <u>per person</u> prepaid expenditures

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# Prepaid Entire Travel Party – FY2017 Tracking
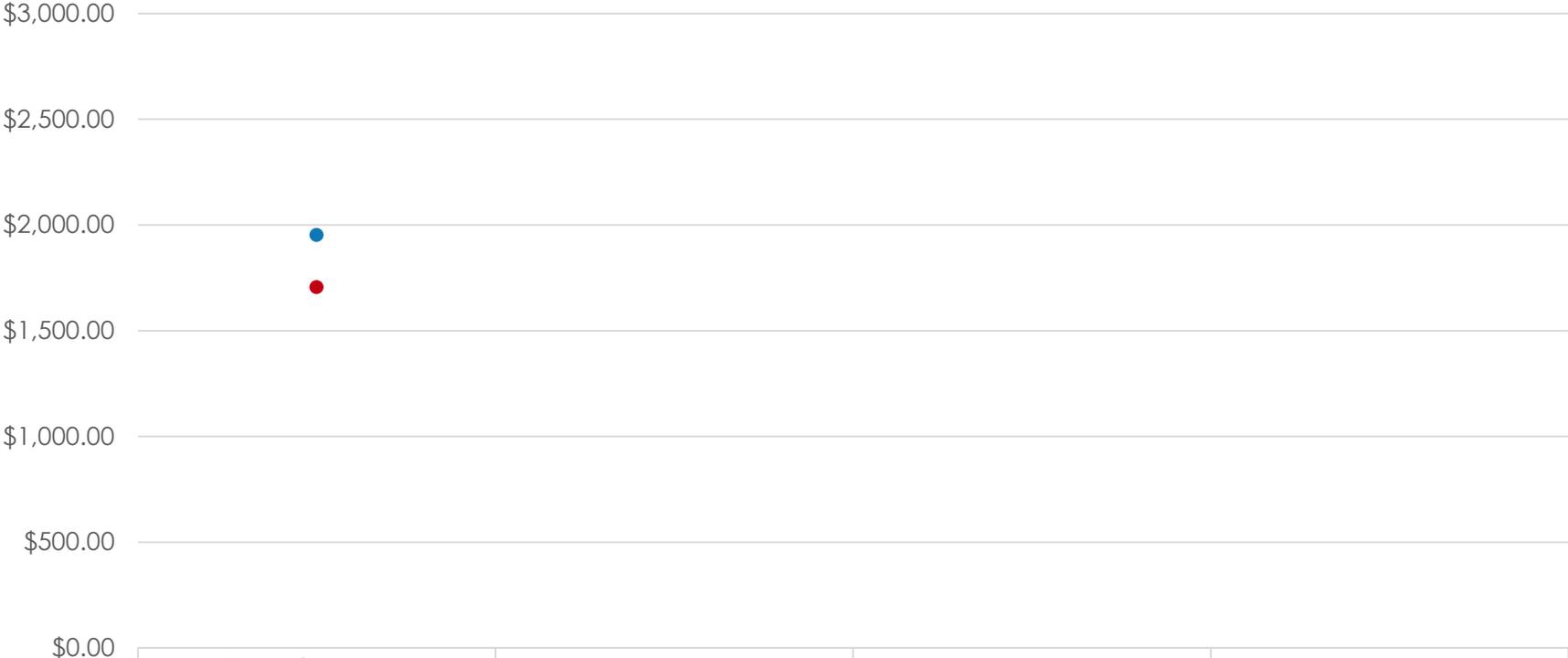
| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $1,953.30 | | | |
| MEDIAN | $1,707.00 | | | |

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# Prepaid Per Person– FY2017 Tracking
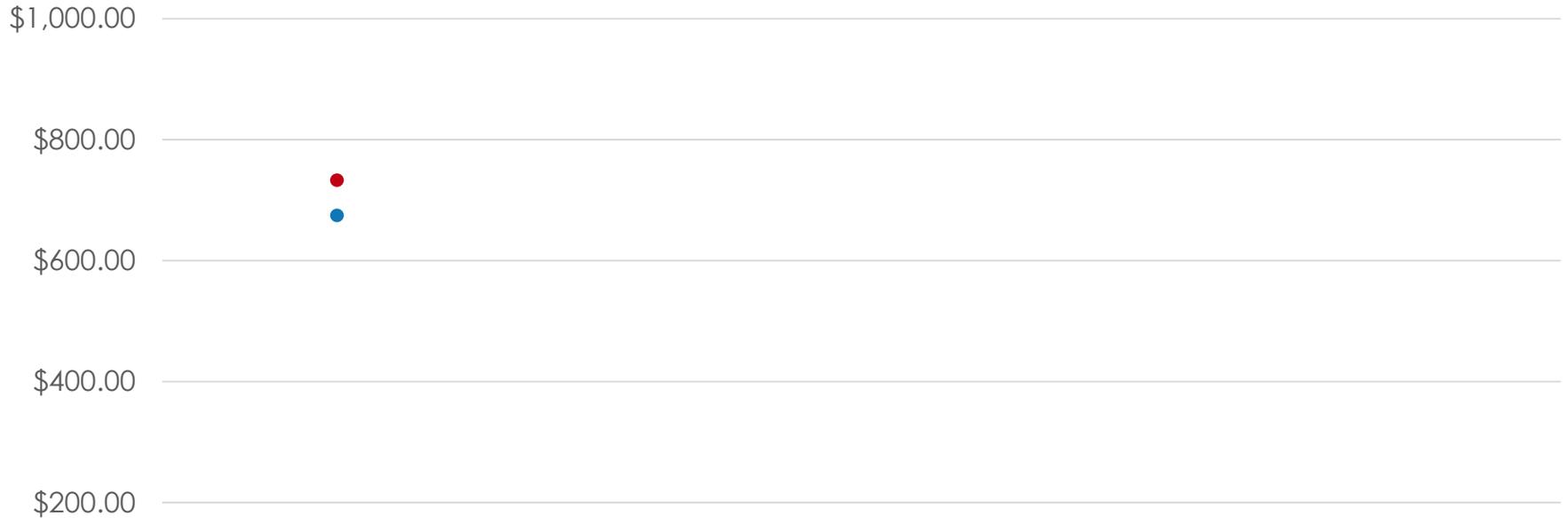


| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $674.62 | | | |
| MEDIAN | $733.00 | | | |

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# Prepaid Per Person– Key Segments

**GUAM VISITORS BUREAU - EXIT SURVEY**

**Q10A  How much did you pay in RUSSIA before coming to Guam for the tour package, your airfare, lodging meals, and transportation?**

**PER PERSON**

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| PREPAID PP | Mean | $674.62 | $620.59 | $205.76 | $1,046.65 | $638.38 | $673.39 | $688.67 | $361.48 | $649.52 |
| | Median | $733 | $595 | $0 | $1,116 | $549 | $730 | $733 | $0 | $659 |

Prepared by QMark Research

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# Prepaid Expenses by Category – MEAN Entire Travel Party

[A]
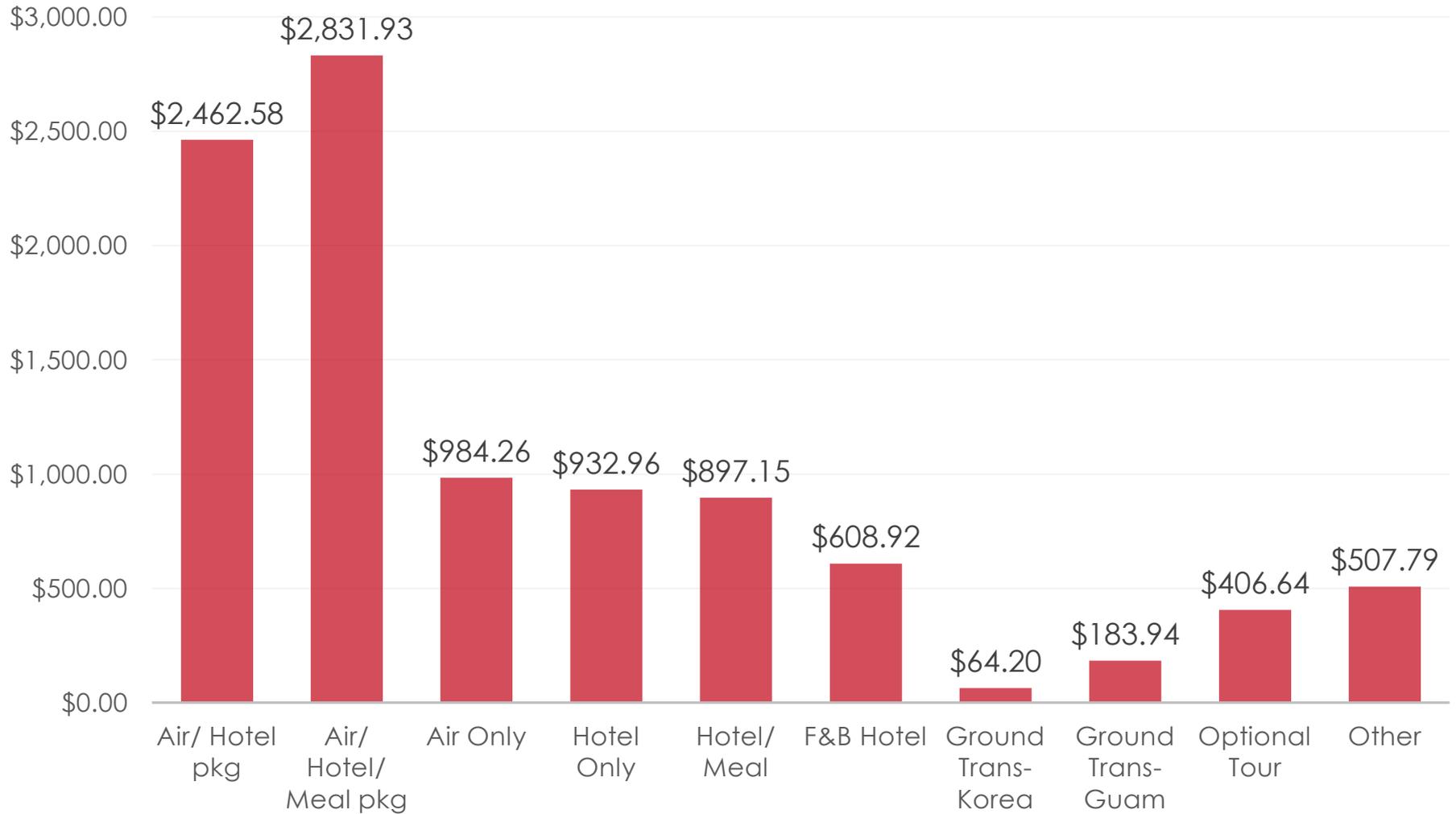
# Prepaid– FY2017 Tracking
## Airfare & Accommodation Packages

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $2,462.58 | | | |
| MEDIAN | $1,978.00 | | | |

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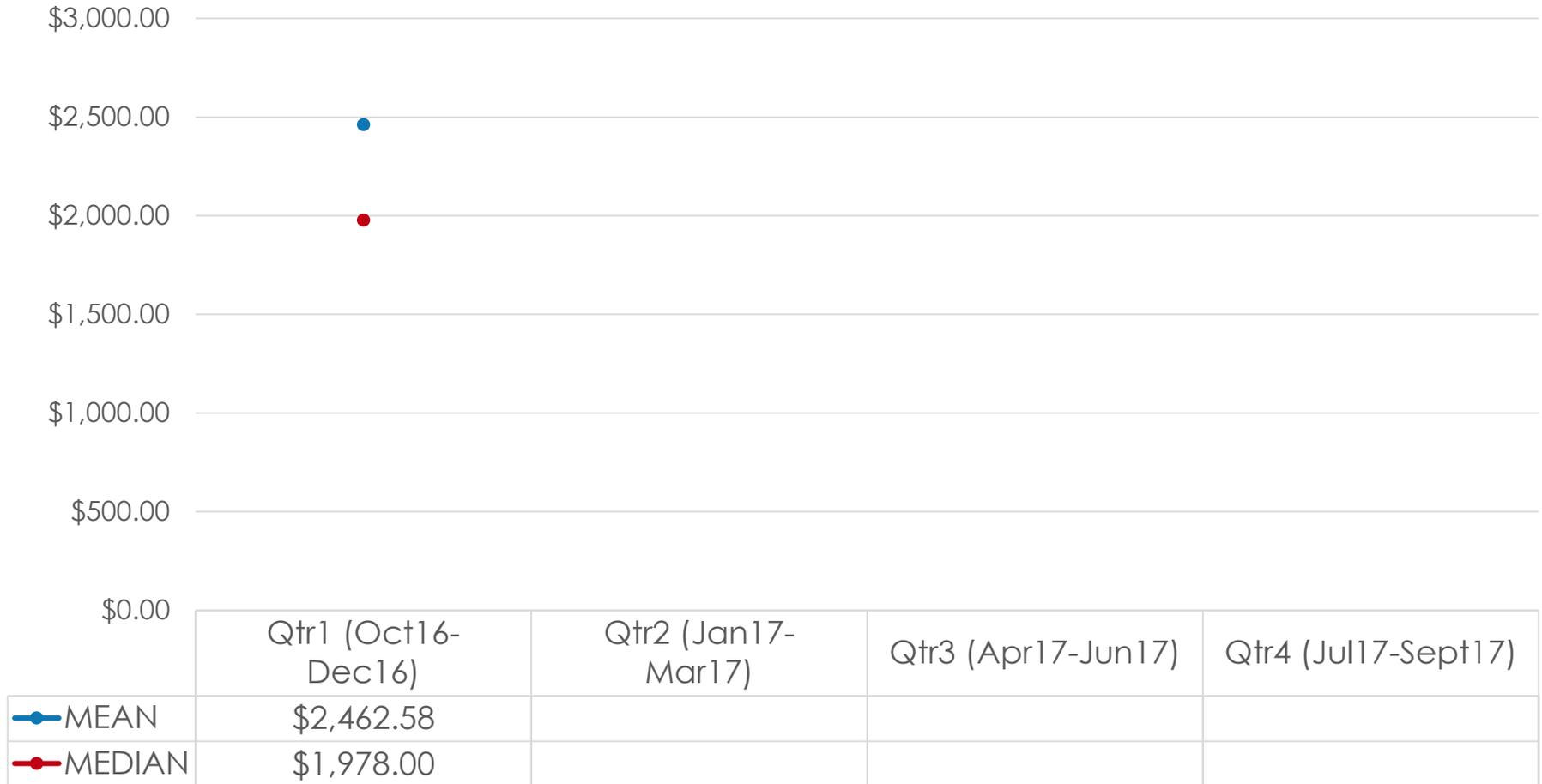
# Prepaid– FY2017 Tracking
## Airfare & Accommodation W/ Meal Packages
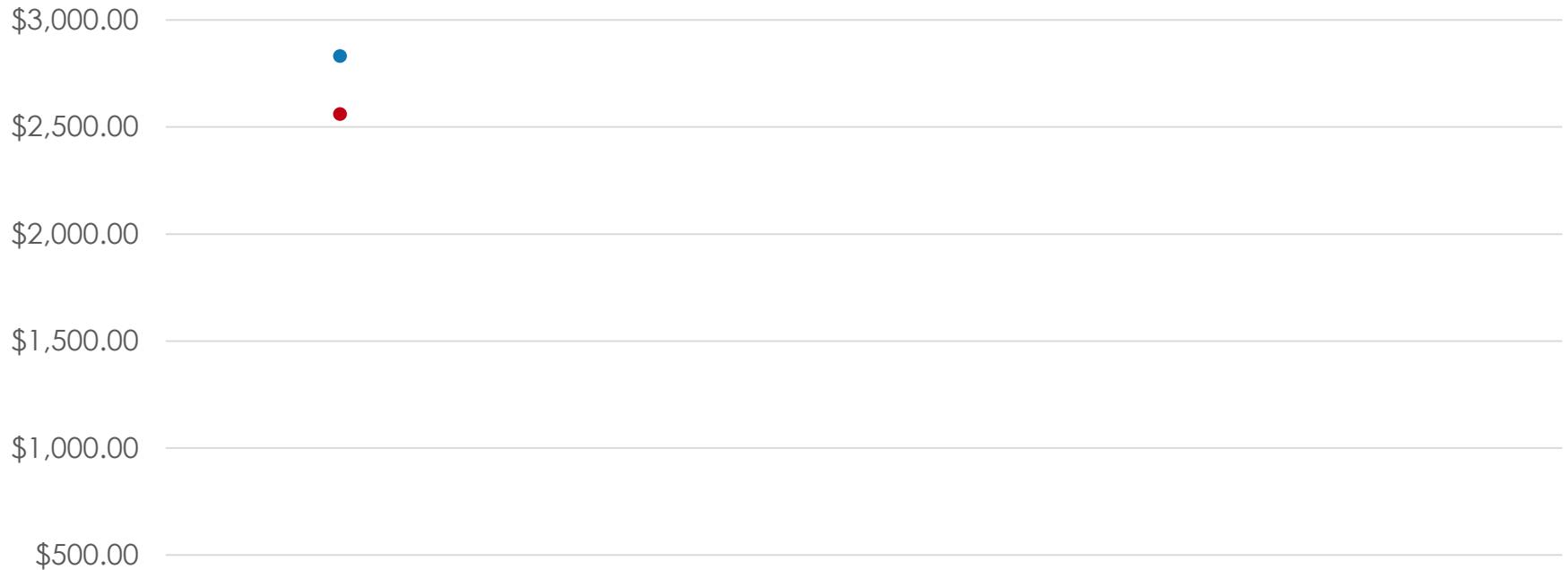
| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $2,831.93 | | | |
| MEDIAN | $2,560.00 | | | |

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# Prepaid– FY2017 Tracking
## Airfare Only
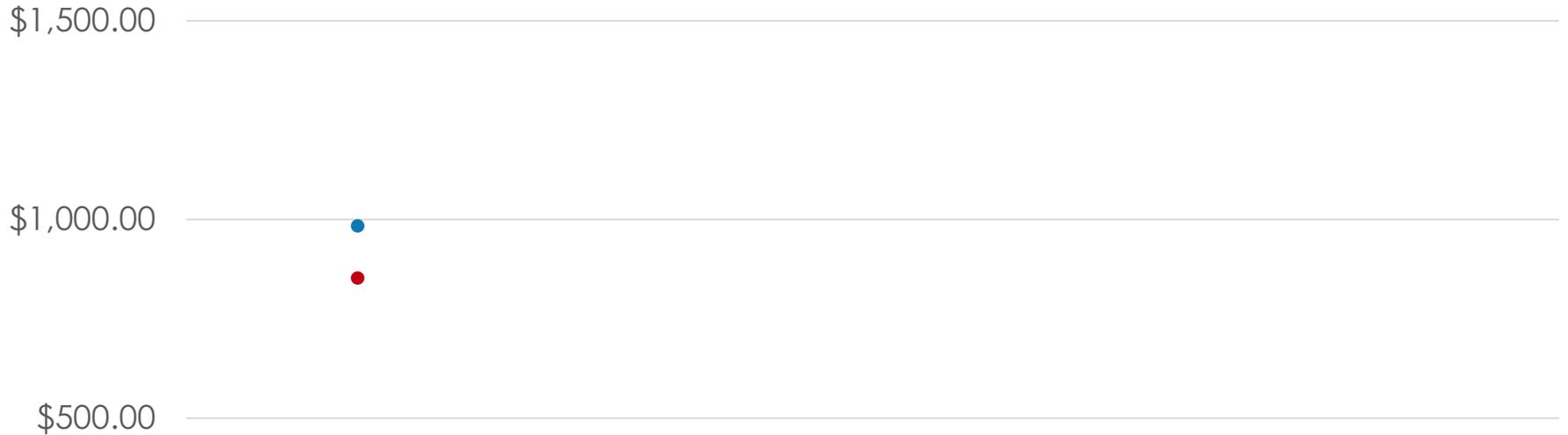


| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $984.26 | | | |
| MEDIAN | $853.00 | | | |

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# Prepaid– FY2017 Tracking
## Accommodations Only

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| ●—MEAN | $932.96 | | | |
| ●—MEDIAN | $738.00 | | | |

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# Prepaid– FY2017 Tracking
## Accommodations w/ Meal Only
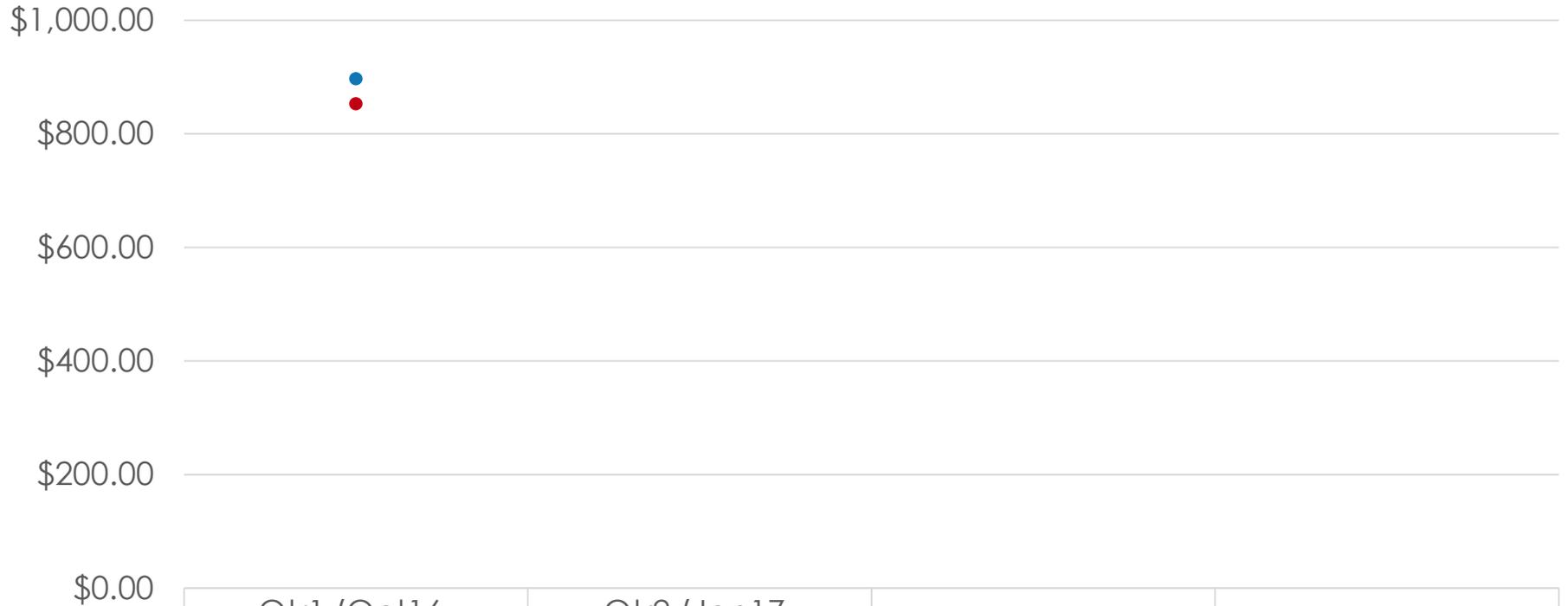
| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $897.15 | | | |
| MEDIAN | $853.00 | | | |

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# Prepaid– FY2017 Tracking
## Food & Beverage in Hotel

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $608.92 | | | |
| MEDIAN | $609.00 | | | |

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# Prepaid– FY2017 Tracking
## Ground Transportation - Russia



|  | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $64.20 | | | |
| MEDIAN | $44.00 | | | |
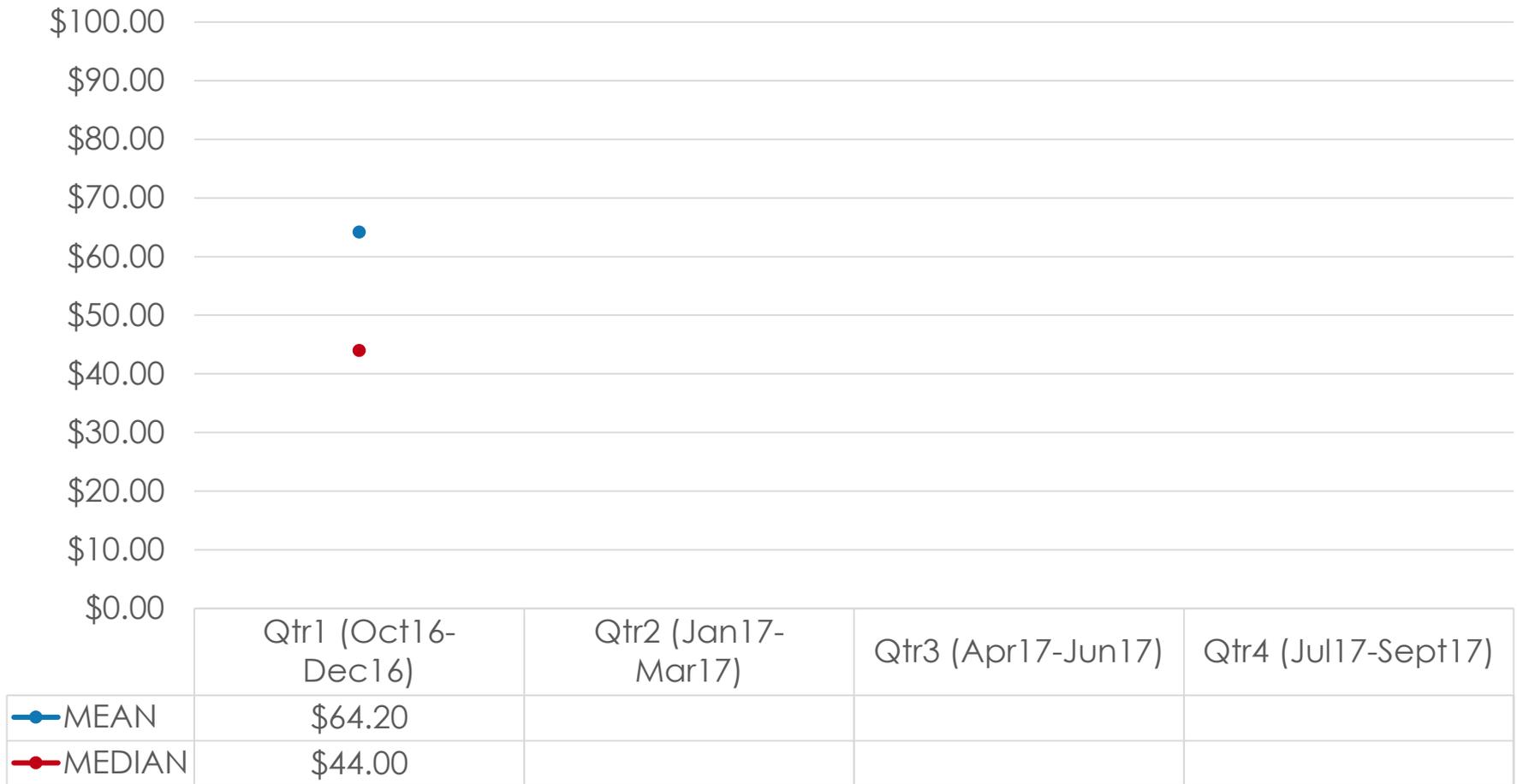
# Prepaid– FY2017 Tracking
## Ground Transportation - Guam

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $183.94 | | | |
| MEDIAN | $154.00 | | | |

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# Prepaid– FY2017 Tracking
## Optional tours/ Activities
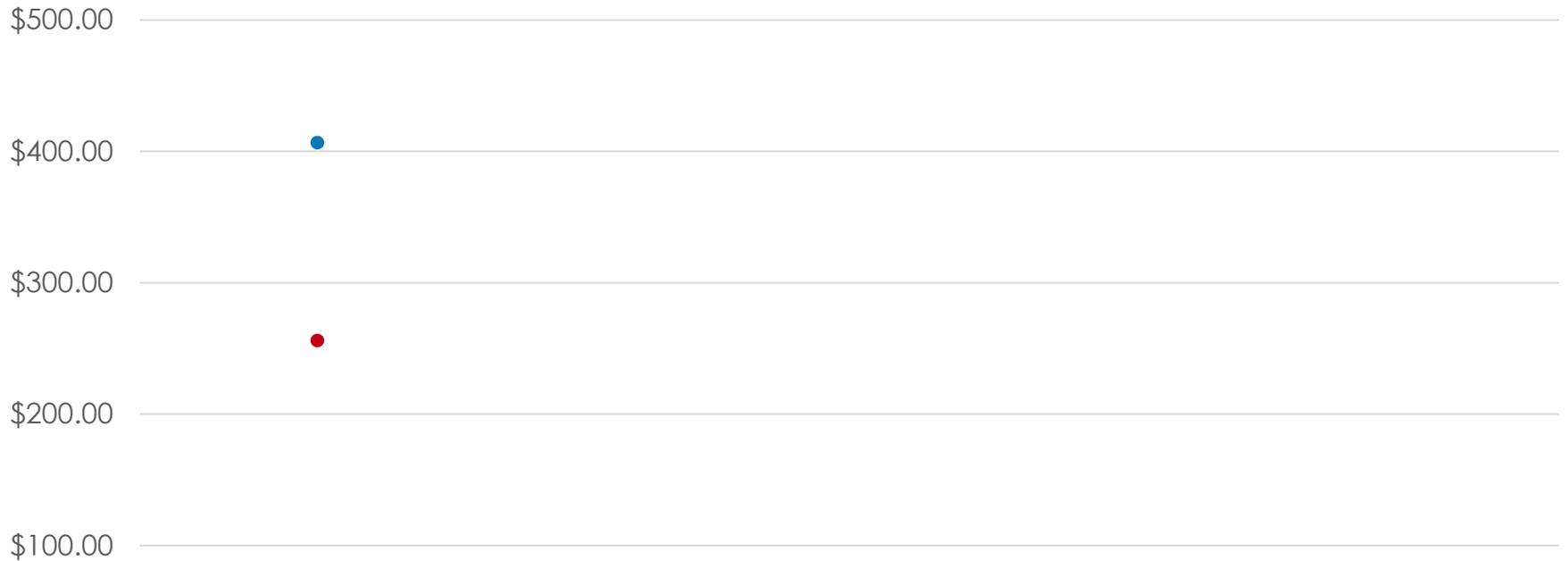


|  | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $406.64 | | | |
| MEDIAN | $256.00 | | | |

# On-Island Expenditures

- $968.26 = overall mean average prepaid expense (for entire travel party size) by respondent

- $378.19 = overall mean average <u>per person</u> prepaid expenditures

[A]

# On-Island Entire Travel Party – FY2017 Tracking
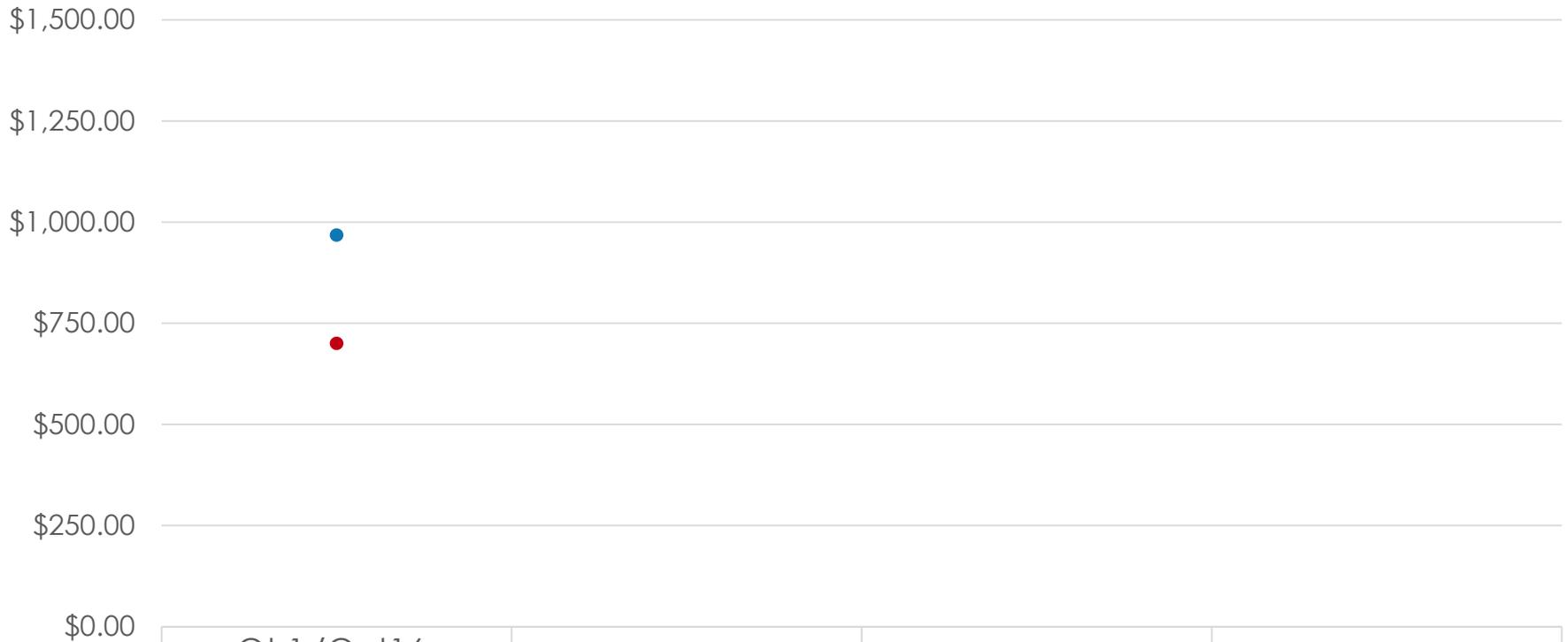
| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $968.26 | | | |
| MEDIAN | $700.00 | | | |

[A]

# On-Island Per Person – FY2017 Tracking
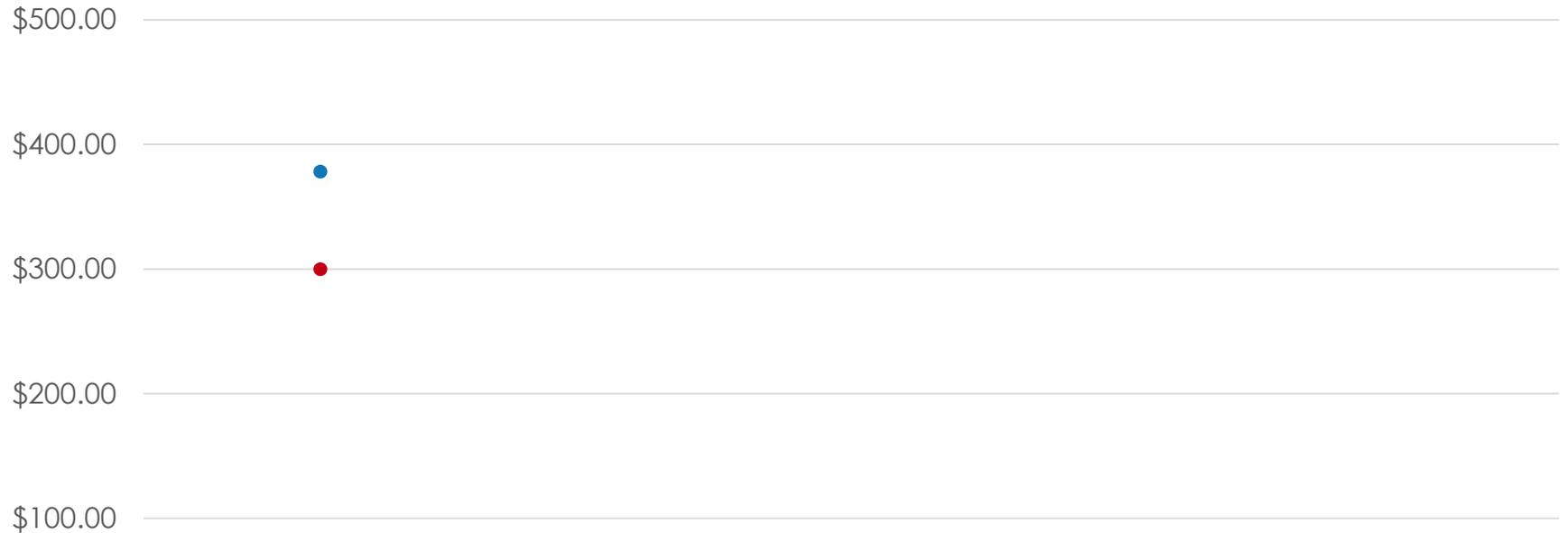


| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $378.19 | | | |
| MEDIAN | $300.00 | | | |

[A]

# On-Island Per Person – Key Segments

**GUAM VISITORS BUREAU - EXIT SURVEY**

**Q11A  How much in total did you spend while on Guam during this trip?**

**PER PERSON**

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| ONISLE PP | Mean | $378.19 | $446.33 | $333.42 | $707.95 | $438.75 | $382.03 | $370.14 | $122.62 | $365.29 |
| | Median | $300 | $333 | $244 | $650 | $316 | $300 | $269 | $0 | $250 |

Prepared by QMark Research

[A]

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

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| On-Island | $378.19 | | | |
| Prepaid | $674.62 | | | |

[A]
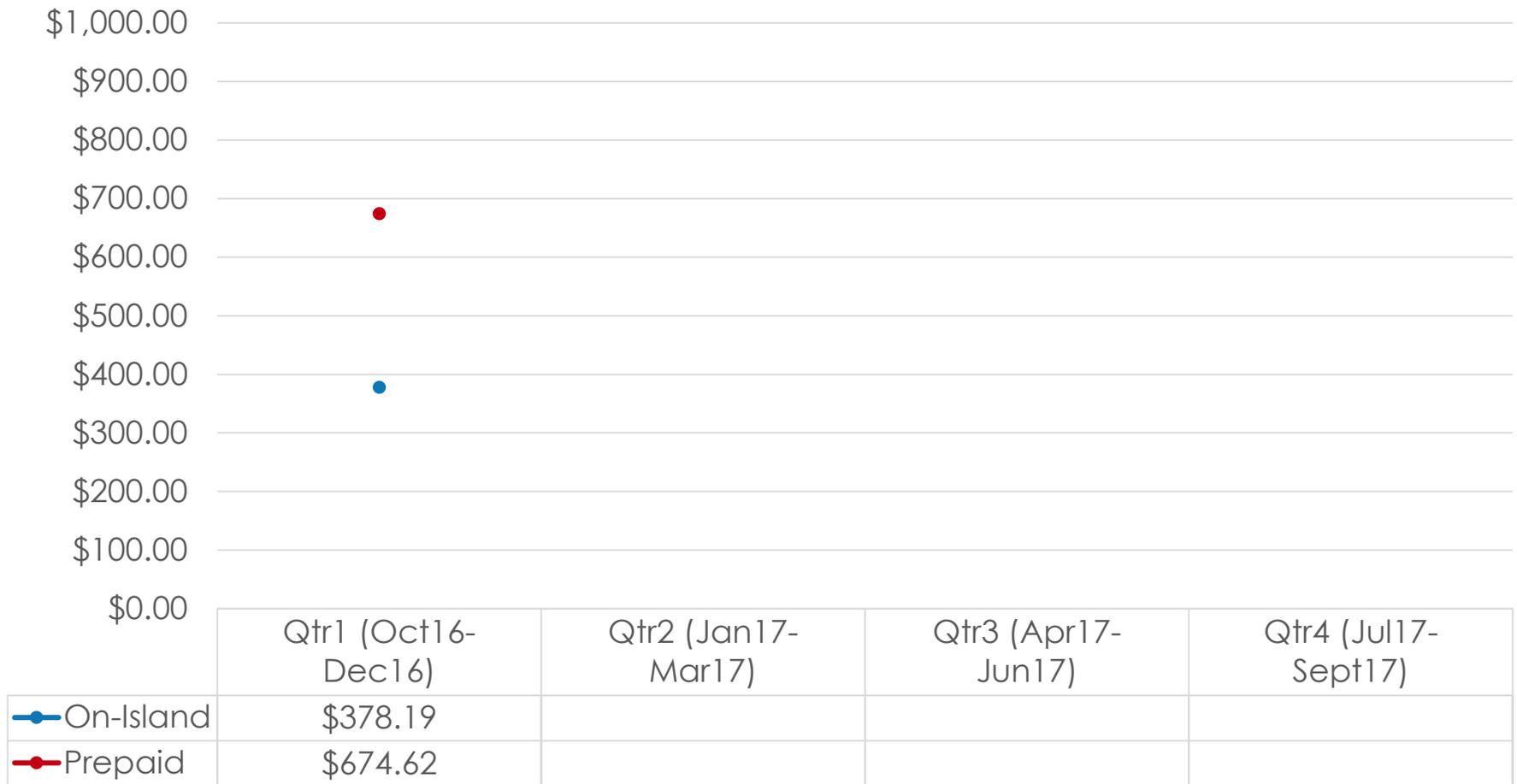
# On-Island Per Day Spending – FY2017 Tracking MEAN

|  | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| Per Person | $107.14 | | | |
| Travel Party | $272.22 | | | |

[A]

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



Bar chart of mean expenses by category:

- F&B Hotel: $55.55
- F&B Fast Food/Conv Store: $19.58
- F&B Restaurant: $73.61
- Optional Tour: $58.76
- Gift- Self: $141.16
- Gift- Others: $79.61
- Local Trans: $42.91
- Other: $497.67

[A]

# On-Island – FY2017 Tracking
## Food & Beverage - Hotel

|  | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $55.55 | | | |

[A]
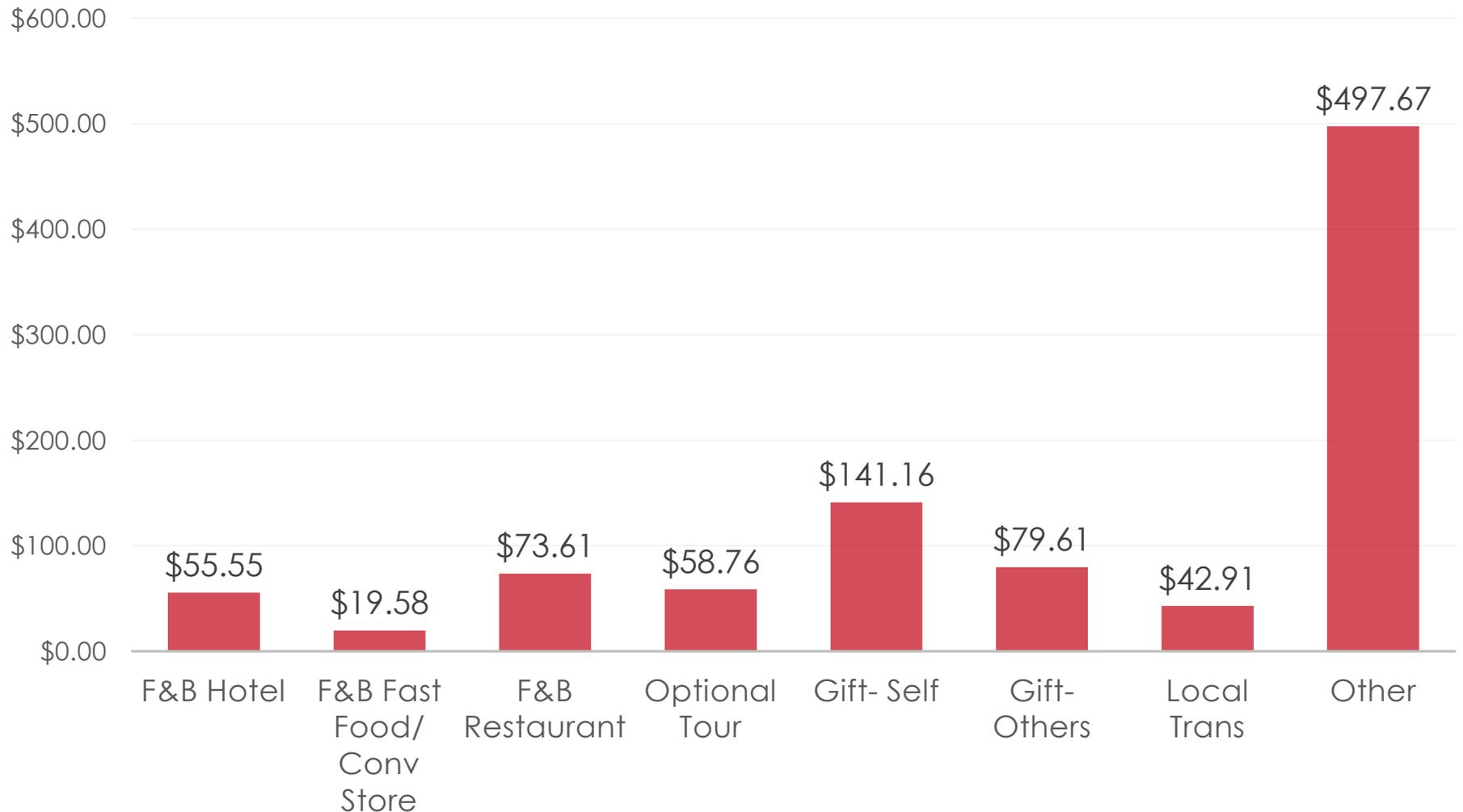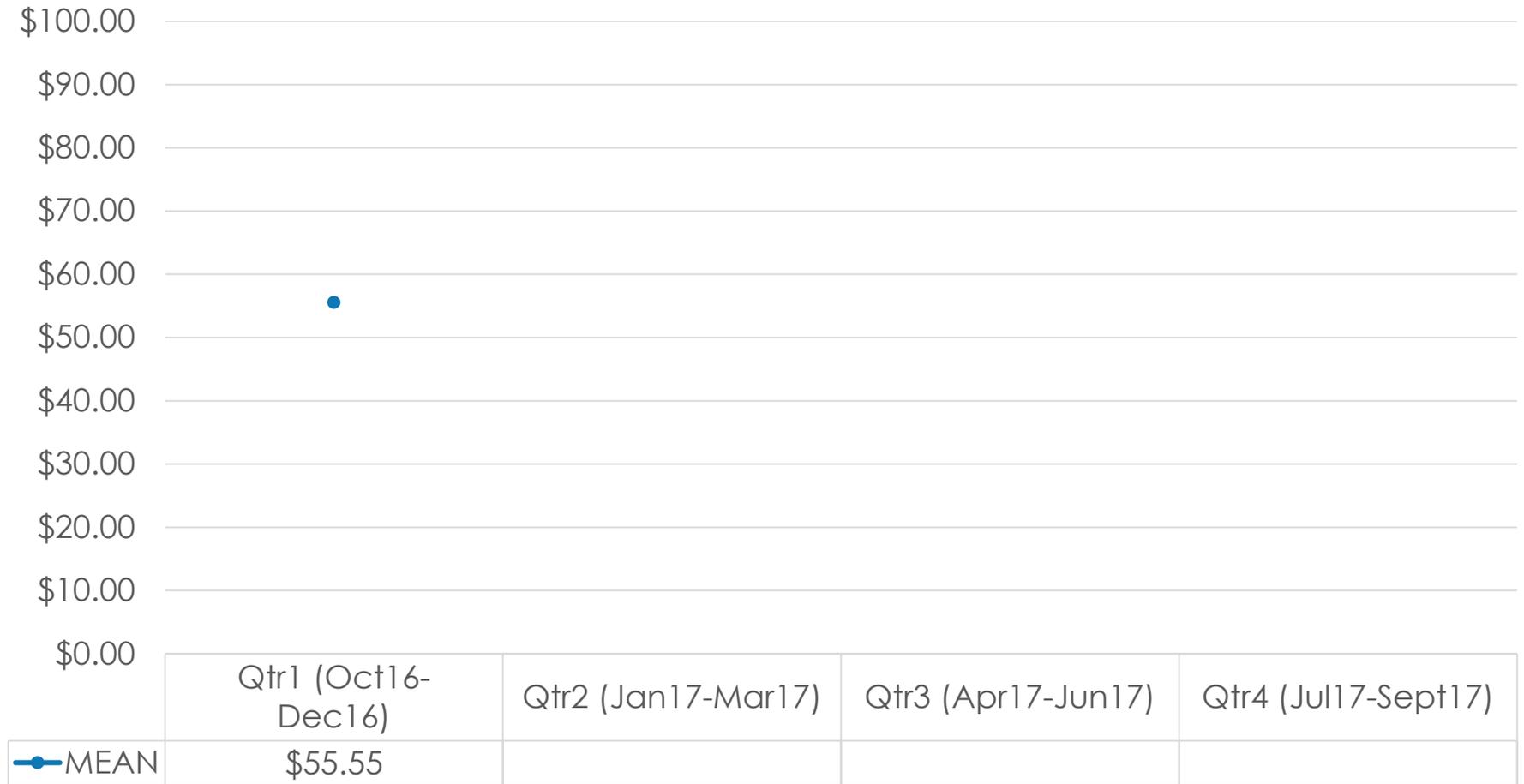
# On-Island – FY2017 Tracking
## Food & Beverage – Fast Food/ Convenience Store

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $19.58 | | | |

[A]
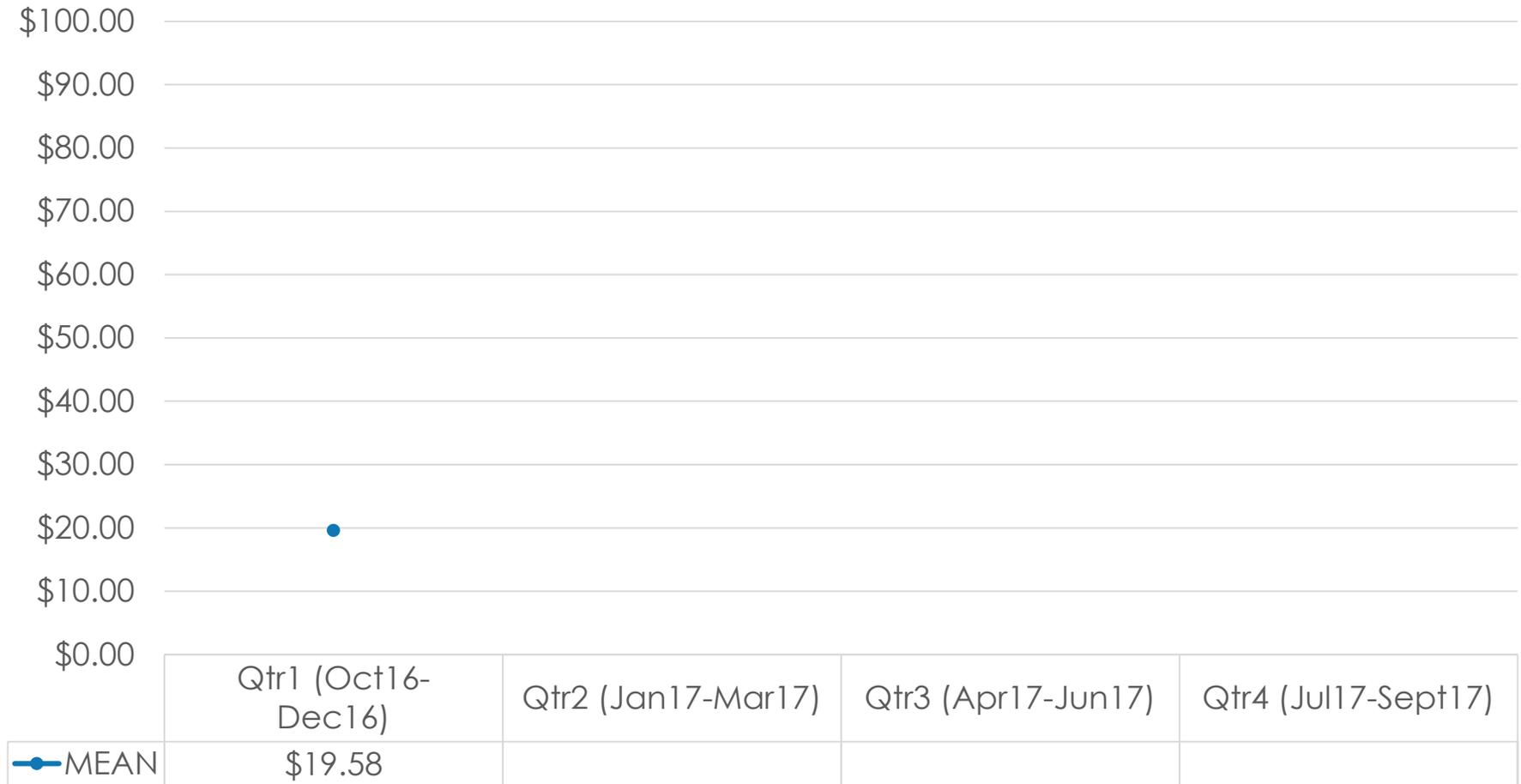
# On-Island – FY2017 Tracking
## Food & Beverage – Restaurant/ Drinking Est Outside Hotel

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $73.61 | | | |

[A]
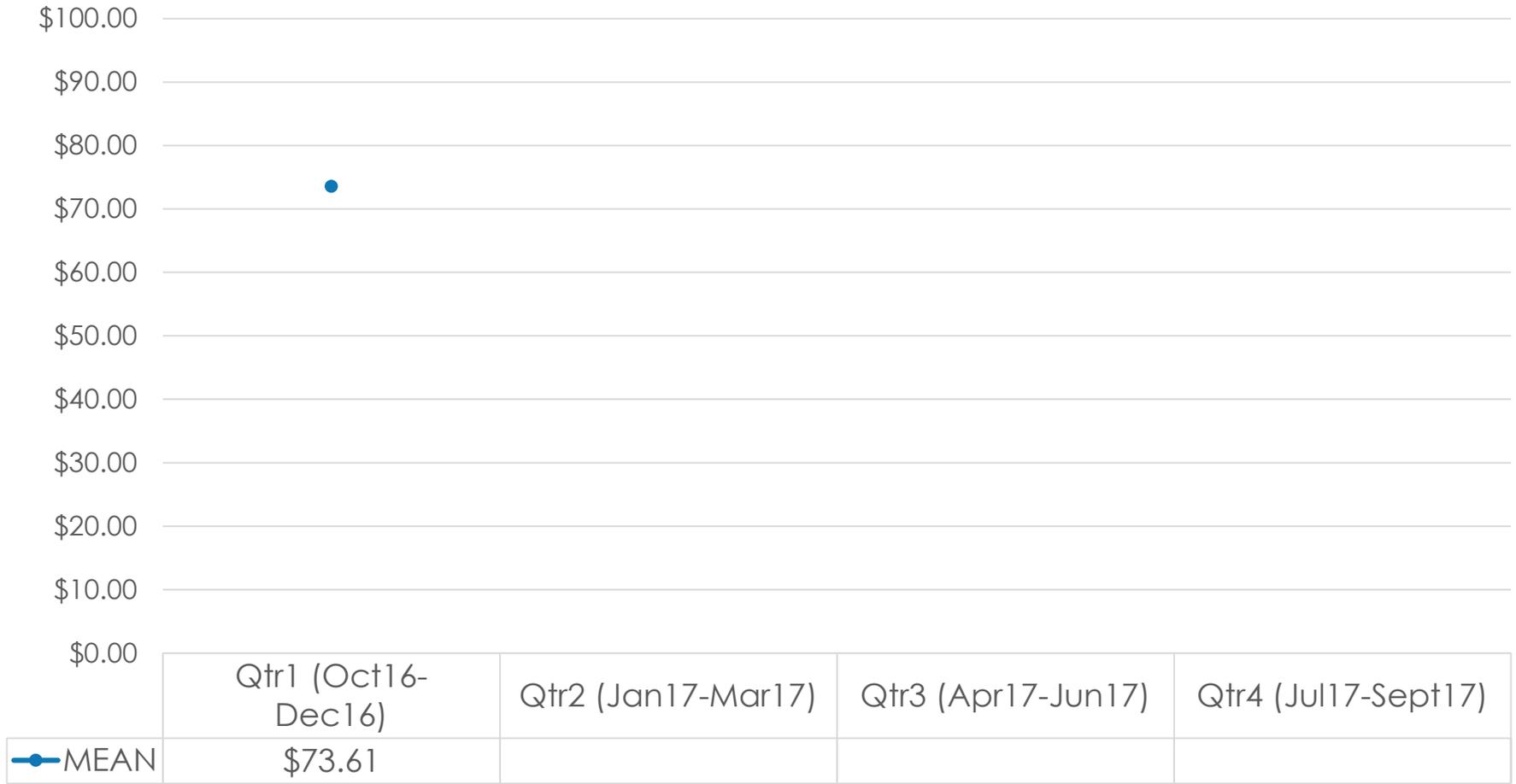
# On-Island – FY2017 Tracking
## Optional tour/ Activities

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $58.76 | | | |

[A]
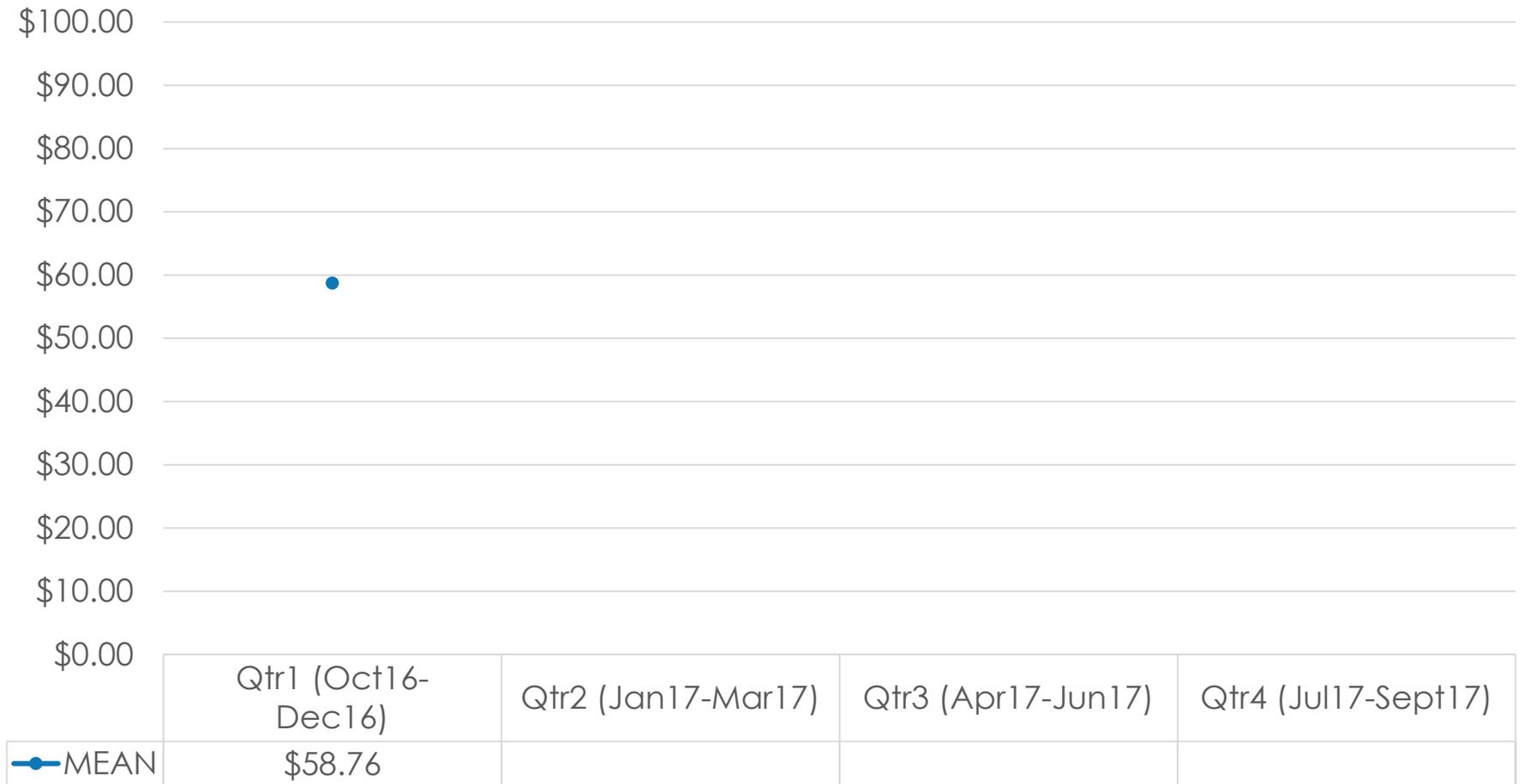
# On-Island – FY2017 Tracking
## Gift/ Souvenir – Self/ Companion

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $141.16 | | | |

[A]
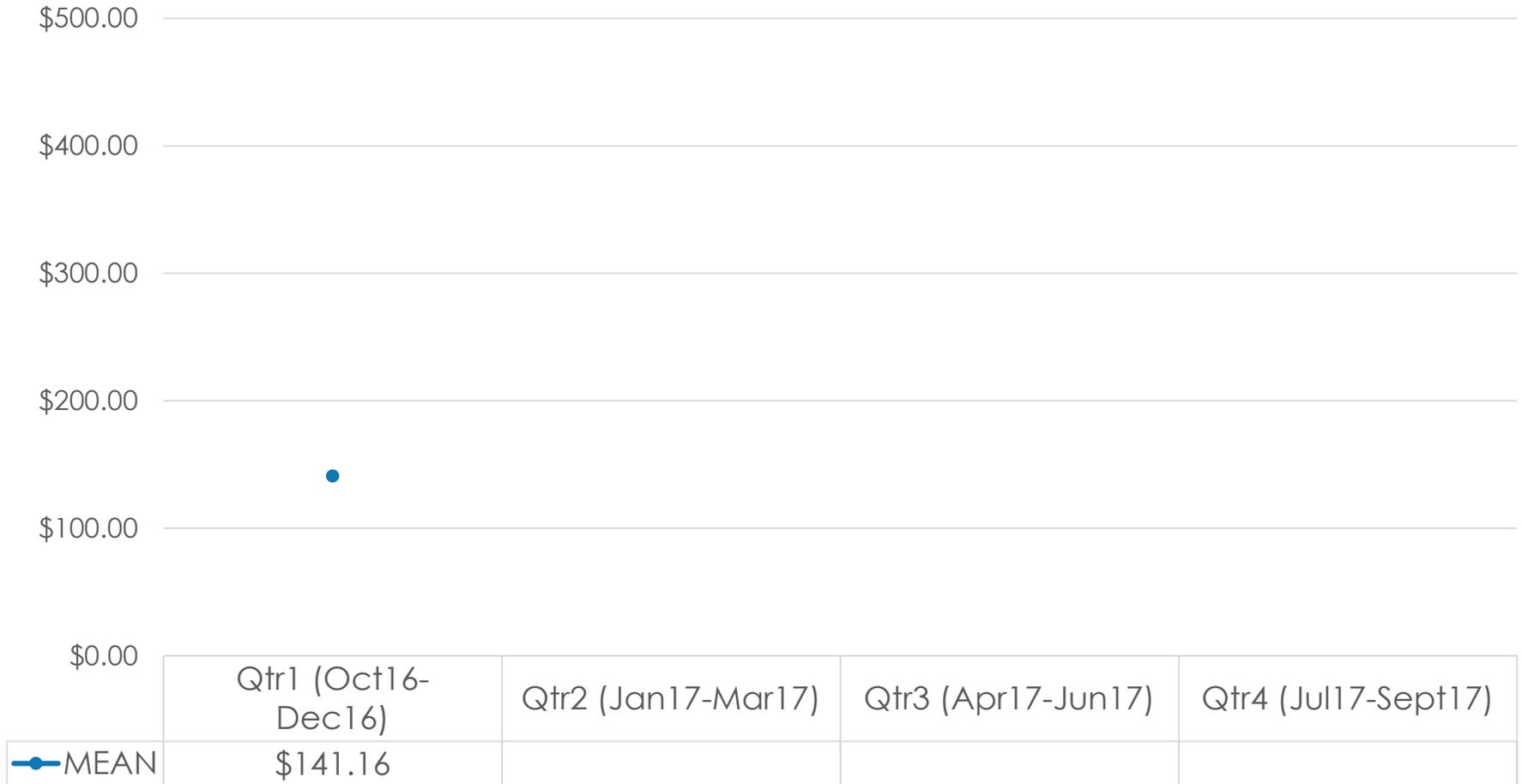
# On-Island – FY2017 Tracking
## Gift/ Souvenir – Friends/ Family

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $79.61 | | | |

[A]
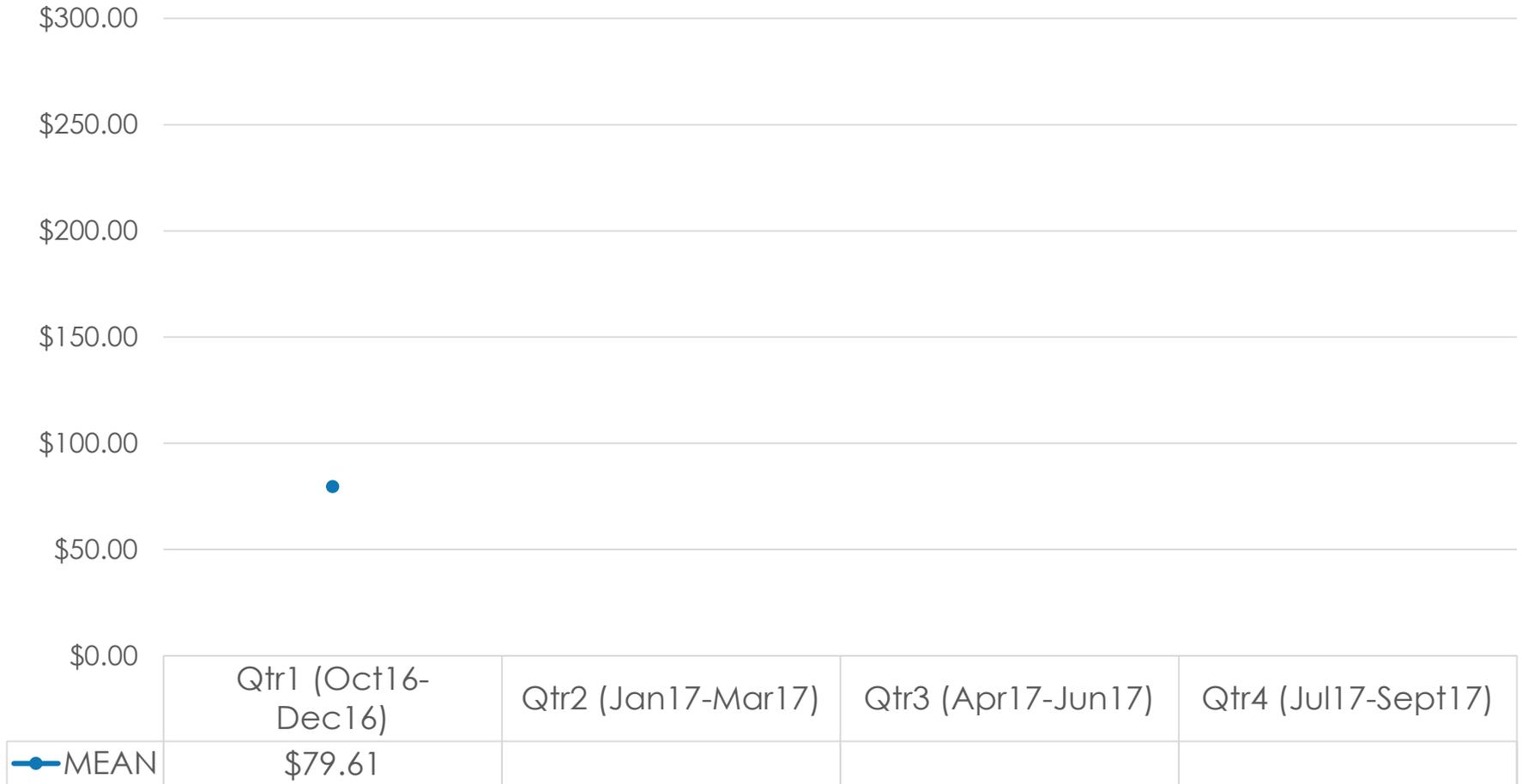
# On-Island – FY2017 Tracking
## Local Transportation

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $42.91 | | | |

[A]
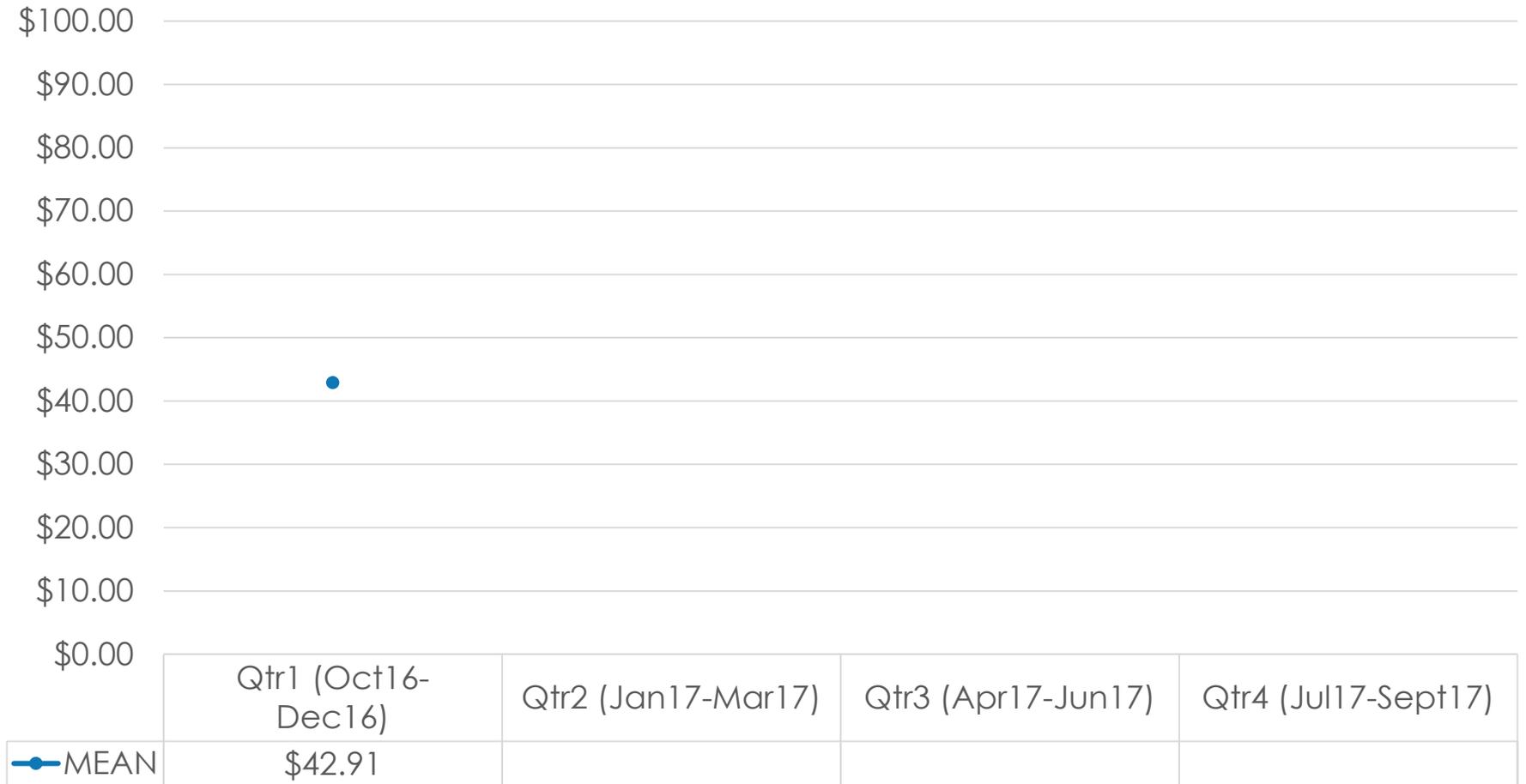
# On-Island – FY2017 Tracking
## Other Not Included



| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $497.67 | | | |

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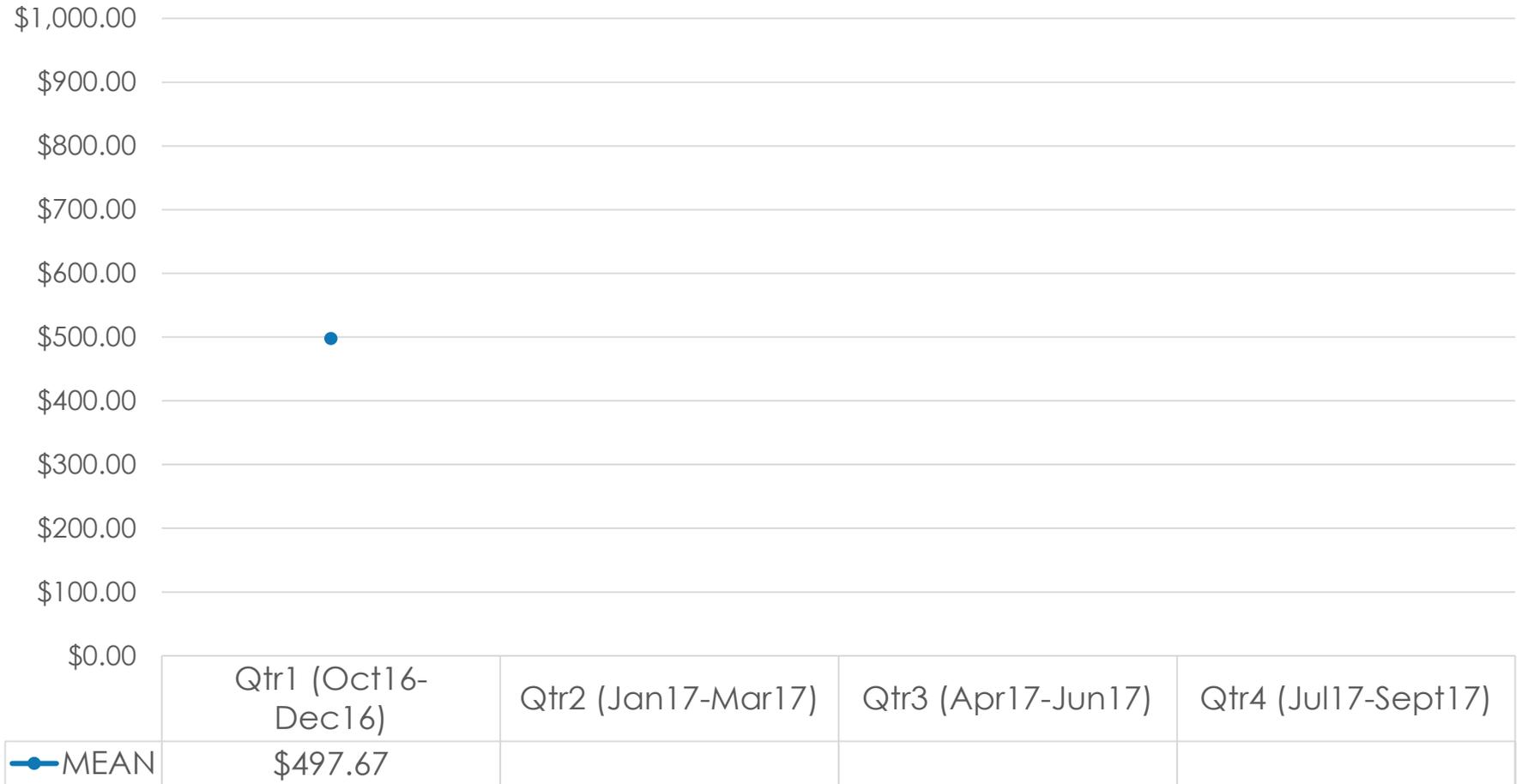
# TOTAL (On-Isle + Prepaid) Expenditures Per Person

- $1,052.81 = overall mean average prepaid & on-isle expense by respondent

[A]

# TOTAL Per Person Expenditures – FY2017 Tracking

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| ● MEAN | $1,052.81 | | | |
| ● MEDIAN | $1,015.00 | | | |

[A]
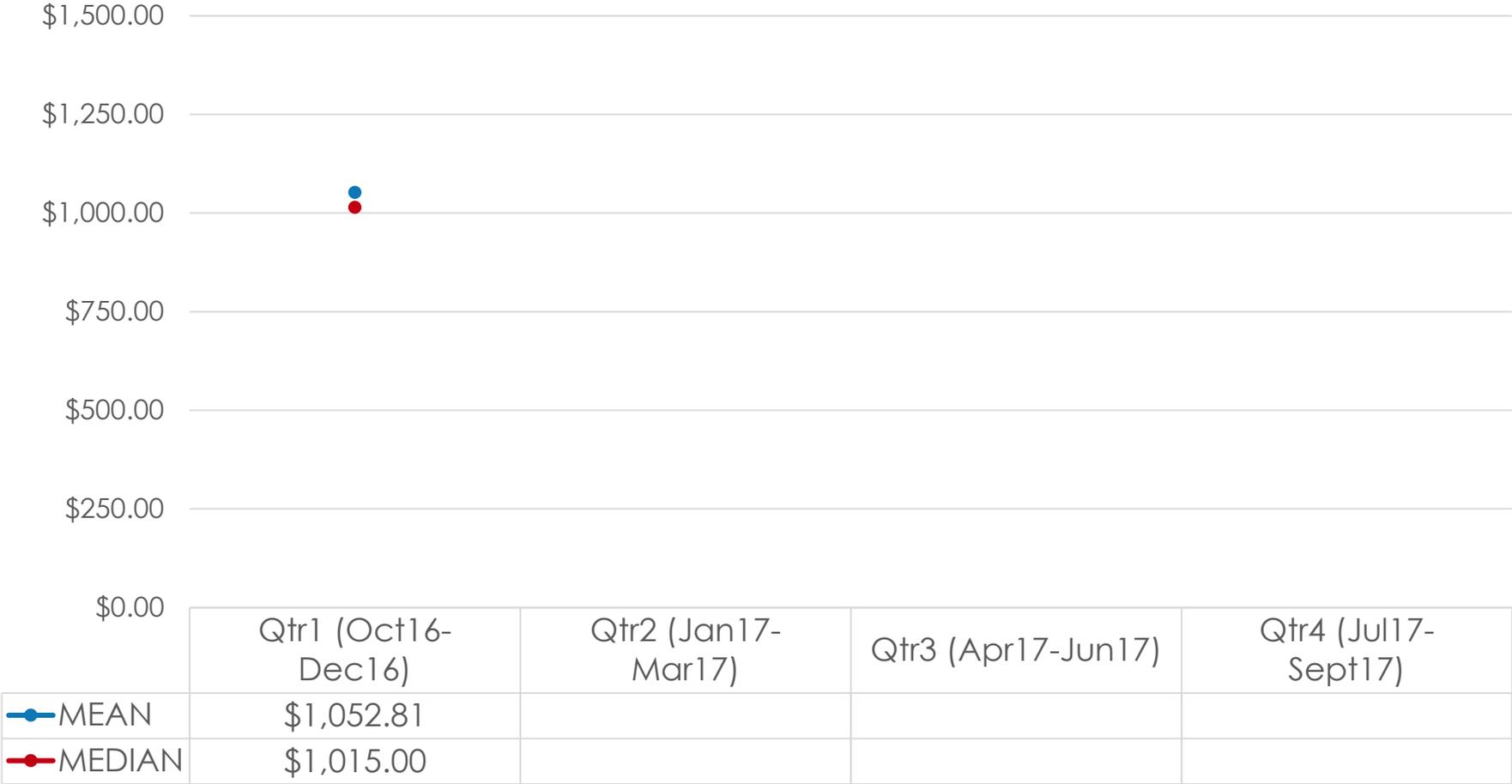
# TOTAL Per Person Expenditures – Key Segments

**GUAM VISITORS BUREAU - EXIT SURVEY**

**TOTAL EXPENDITURES (On-Isle / Prepaid)**

**PER PERSON**

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| TOTAL PP | Mean | $1,052.81 | $1,066.93 | $539.18 | $1,754.60 | $1,077.13 | $1,055.42 | $1,058.82 | $484.10 | $1,014.81 |
| | Median | $1,015 | $947 | $360 | $1,780 | $914 | $1,021 | $1,003 | $200 | $1,010 |

Prepared by QMark Research

[A]

# GUAM AIRPORT EXPENDITURE – FY2017 Tracking

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $71.92 | | | |

[A]
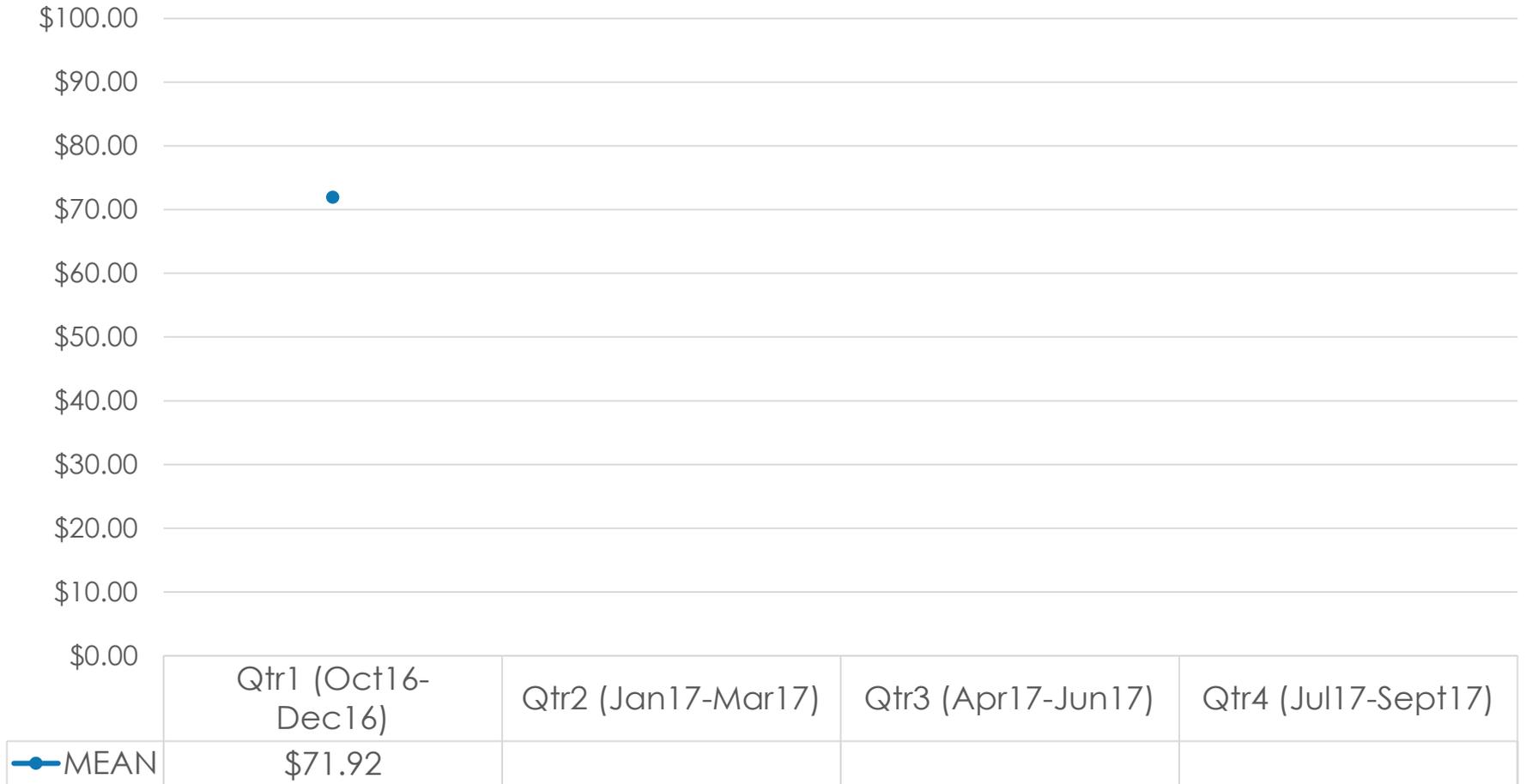
# PARTICIPATED IN SHOP GUAM e-FESTIVAL



Yes
6%

No
94%

[A]
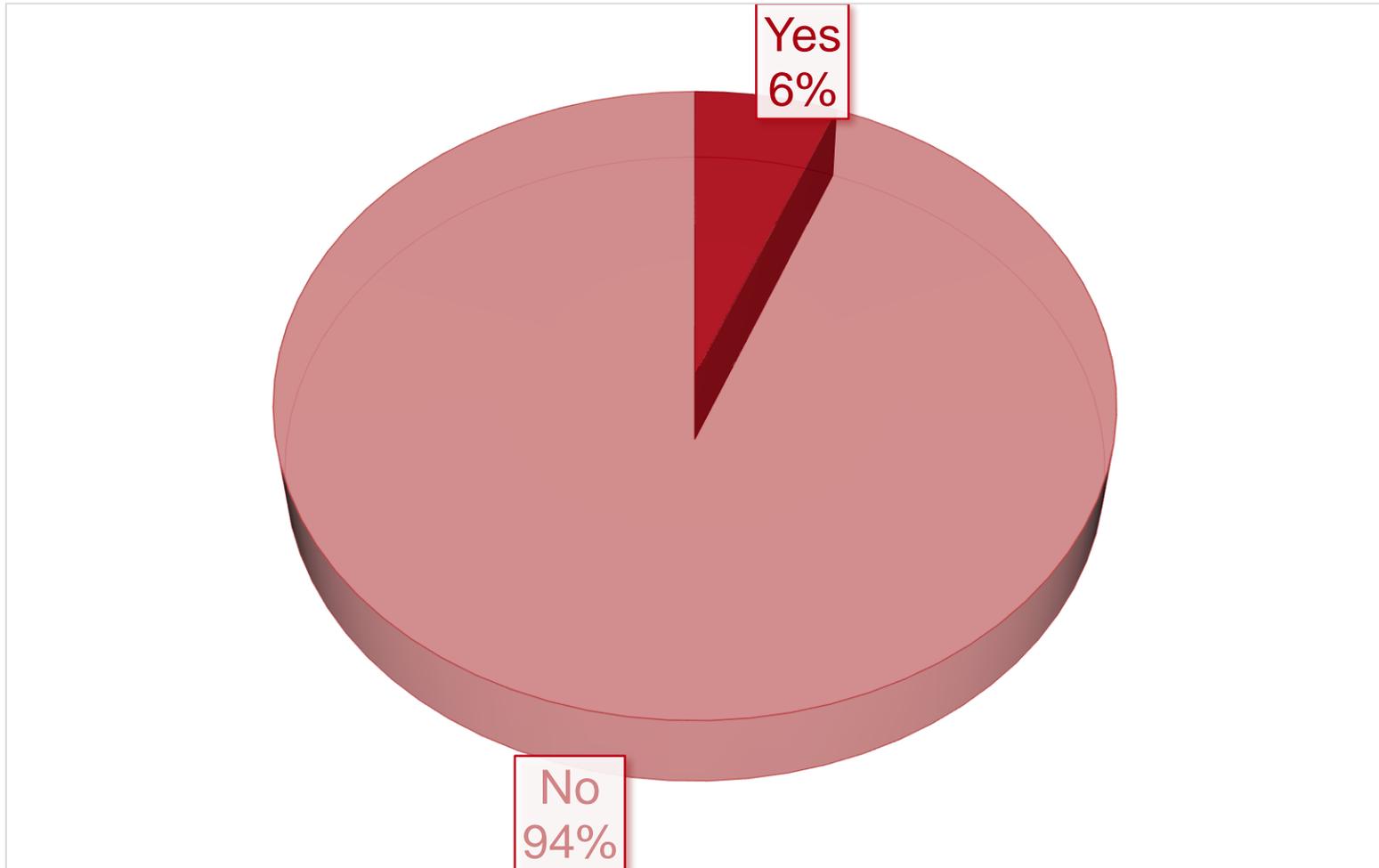
# SHOP GUAM E-FESTIVAL SPENDING – FY2017 Tracking

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|---|---|---|---|---|
| MEAN | $169.19 | | | |

[A]
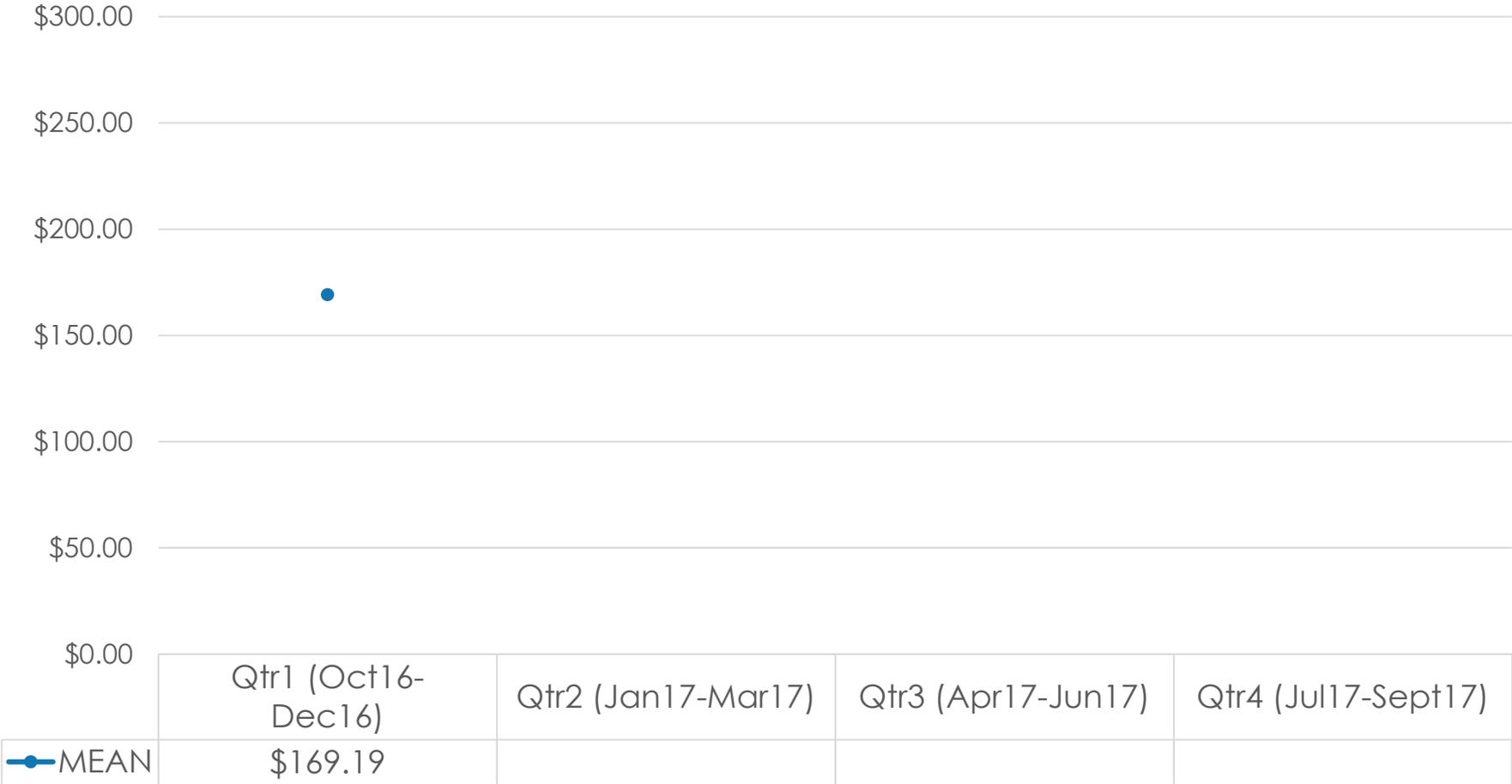
# SECTION 4
# VISITOR SATISFACTION BEHAVIOR

[A]

# OVERALL SATISFACTION
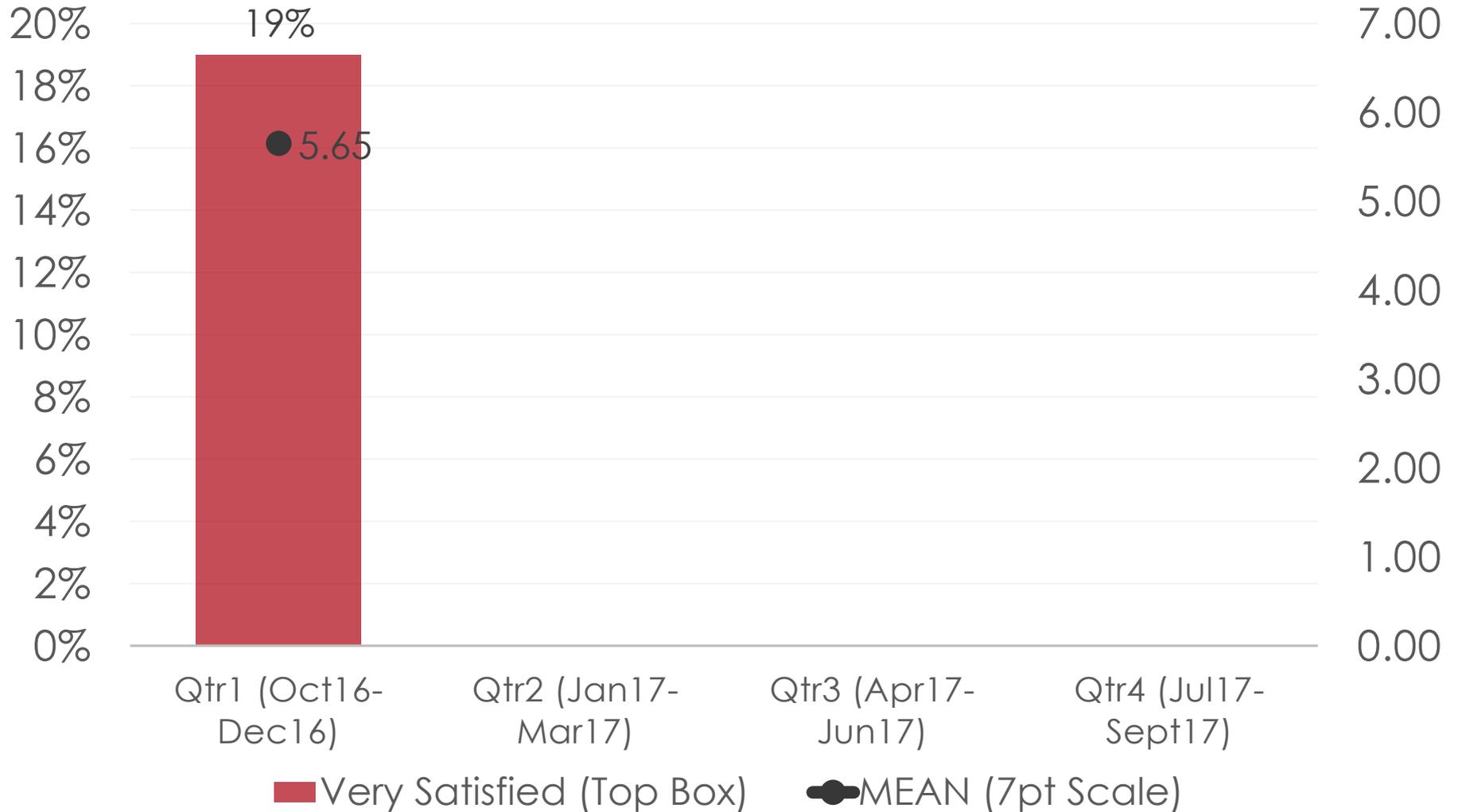
# Guam was better than expected



Qtr1 (Oct16-Dec16): 30% / 5.75

Strongly agree — MEAN (7pt Scale)

[A]
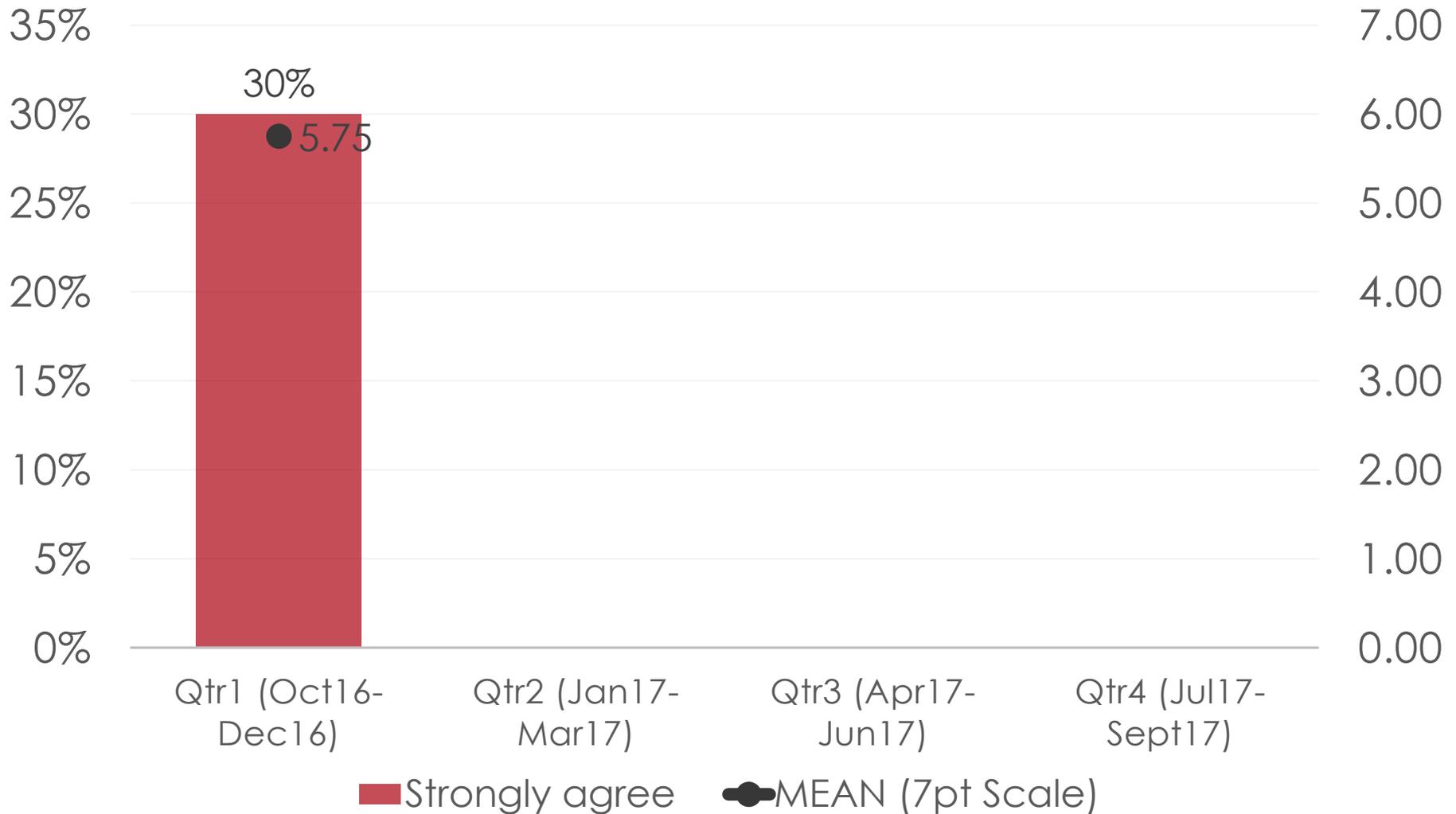
# I had no communication problems



15%

●5.10

Qtr1 (Oct16-Dec16)  Qtr2 (Jan17-Mar17)  Qtr3 (Apr17-Jun17)  Qtr4 (Jul17-Sept17)

■ Strongly agree  ●—MEAN (7pt Scale)

[A]
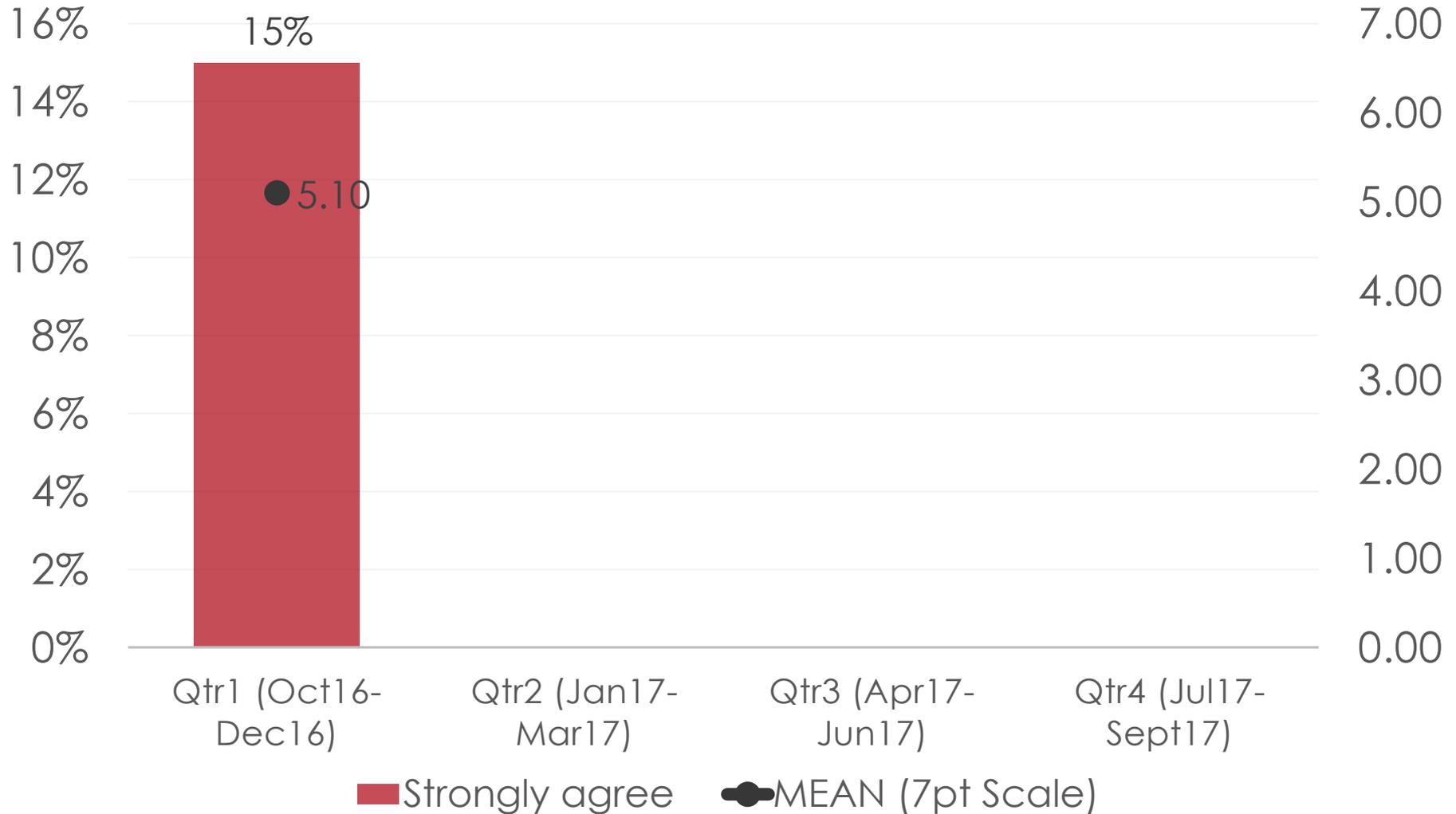
# I will recommend Guam to friends
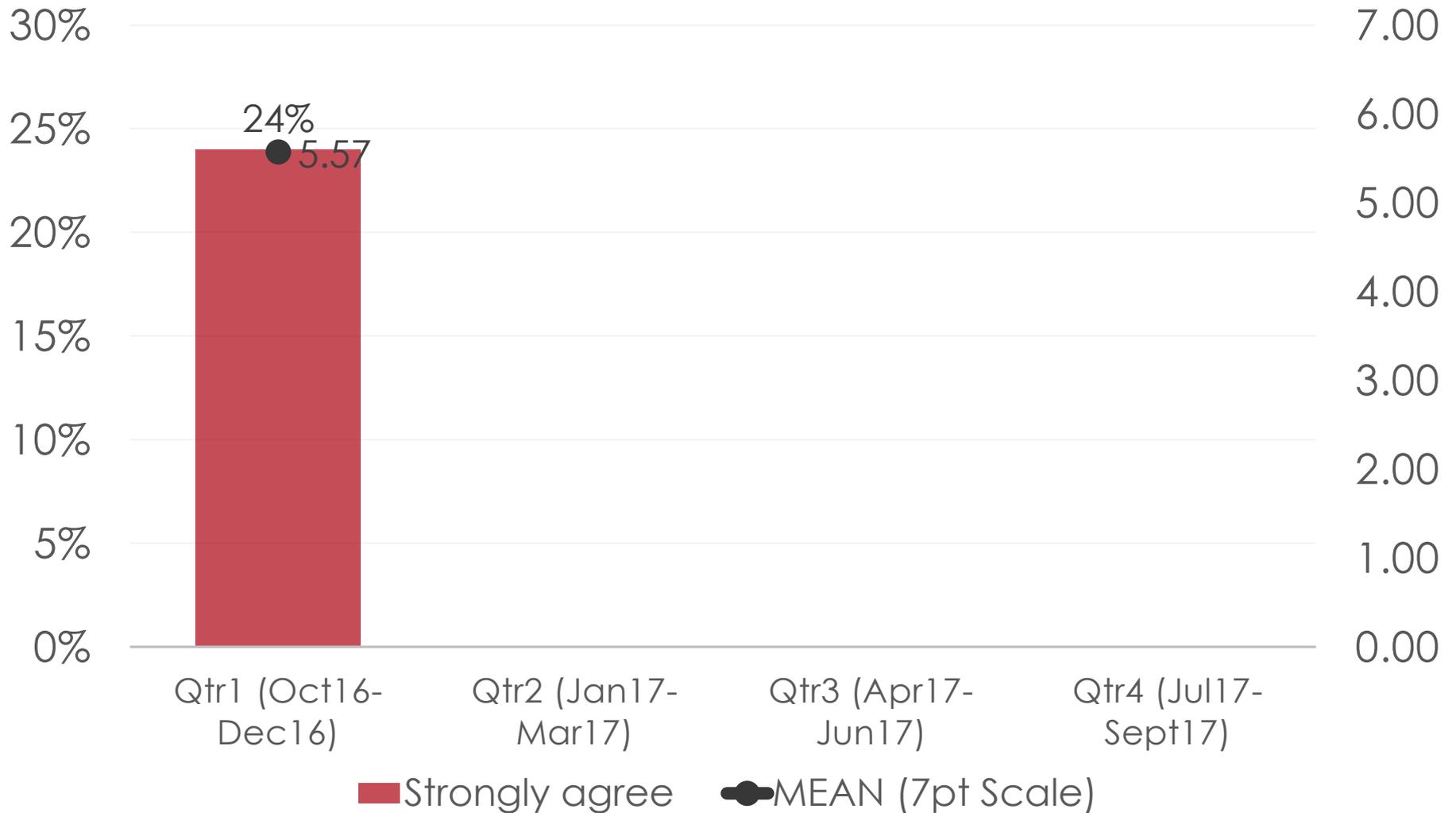
# Sites on Guam were attractive
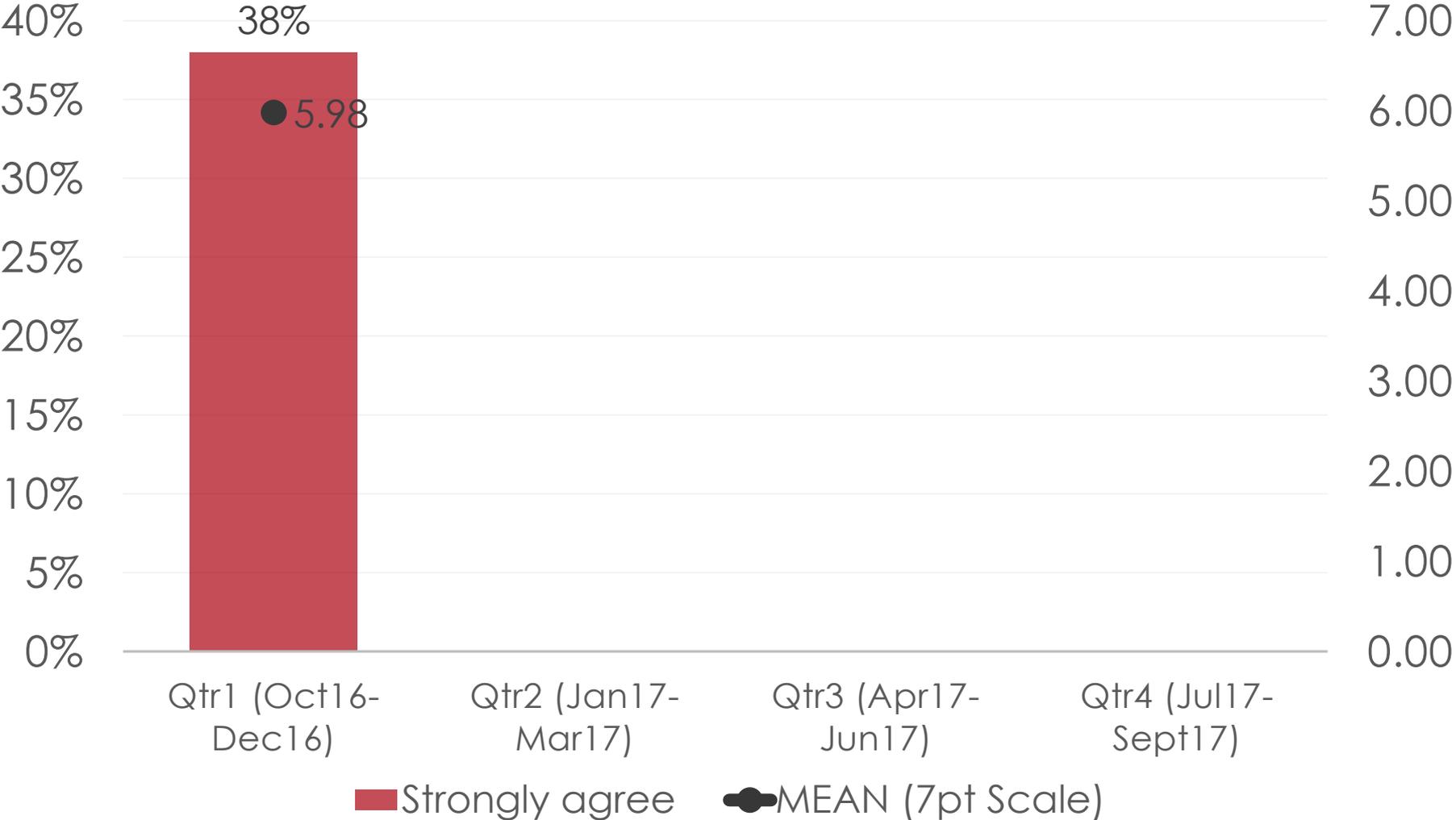
# I plan to visit Guam again



28%

5.63

30% — 7.00

25% — 6.00

20% — 5.00

15% — 4.00

— 3.00

10% — 2.00

5% — 1.00

0% — 0.00

Qtr1 (Oct16-Dec16)    Qtr2 (Jan17-Mar17)    Qtr3 (Apr17-Jun17)    Qtr4 (Jul17-Sept17)

■ Strongly agree    ●— MEAN (7pt Scale)

[A]
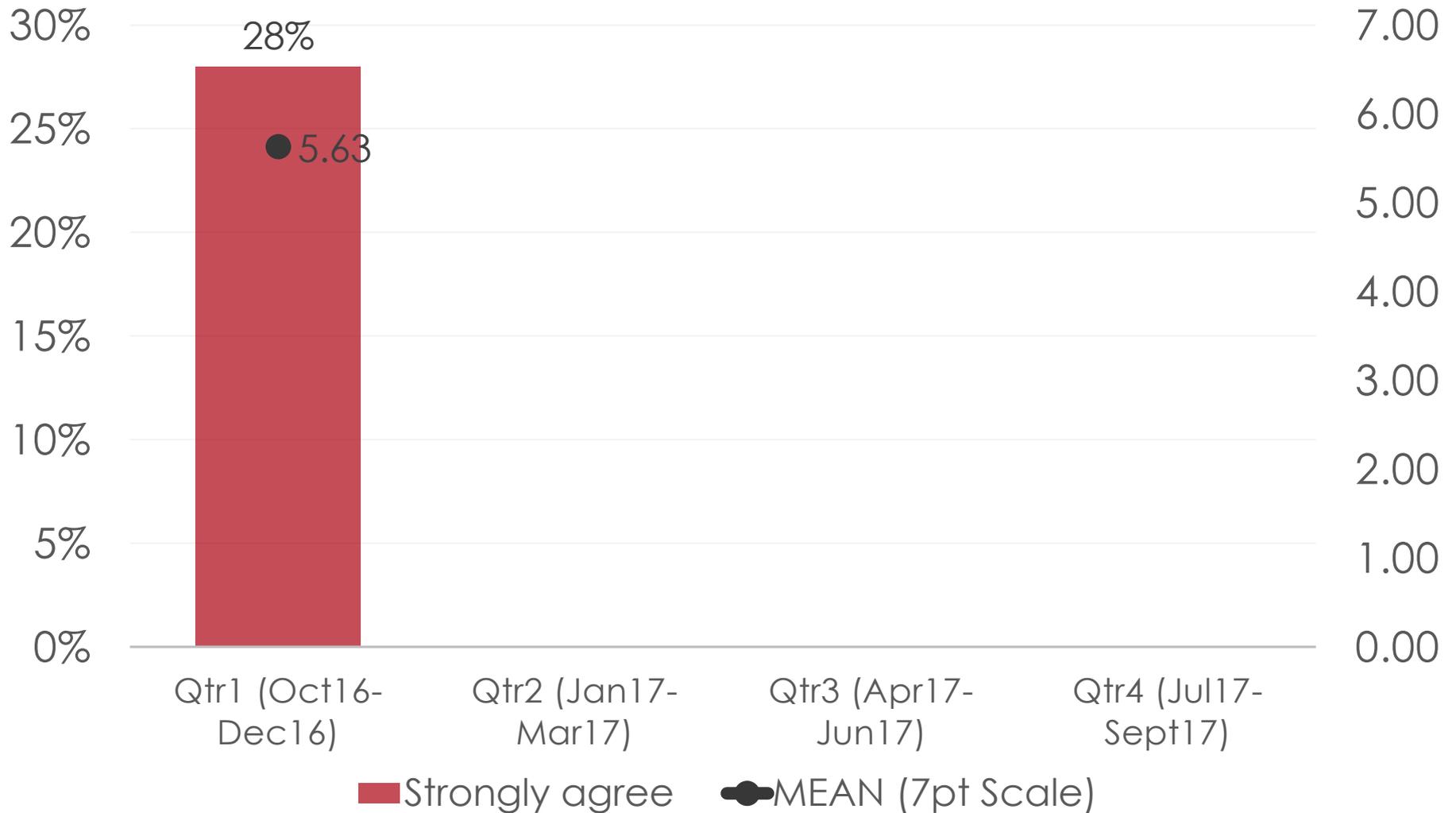
# Not enough night time activities
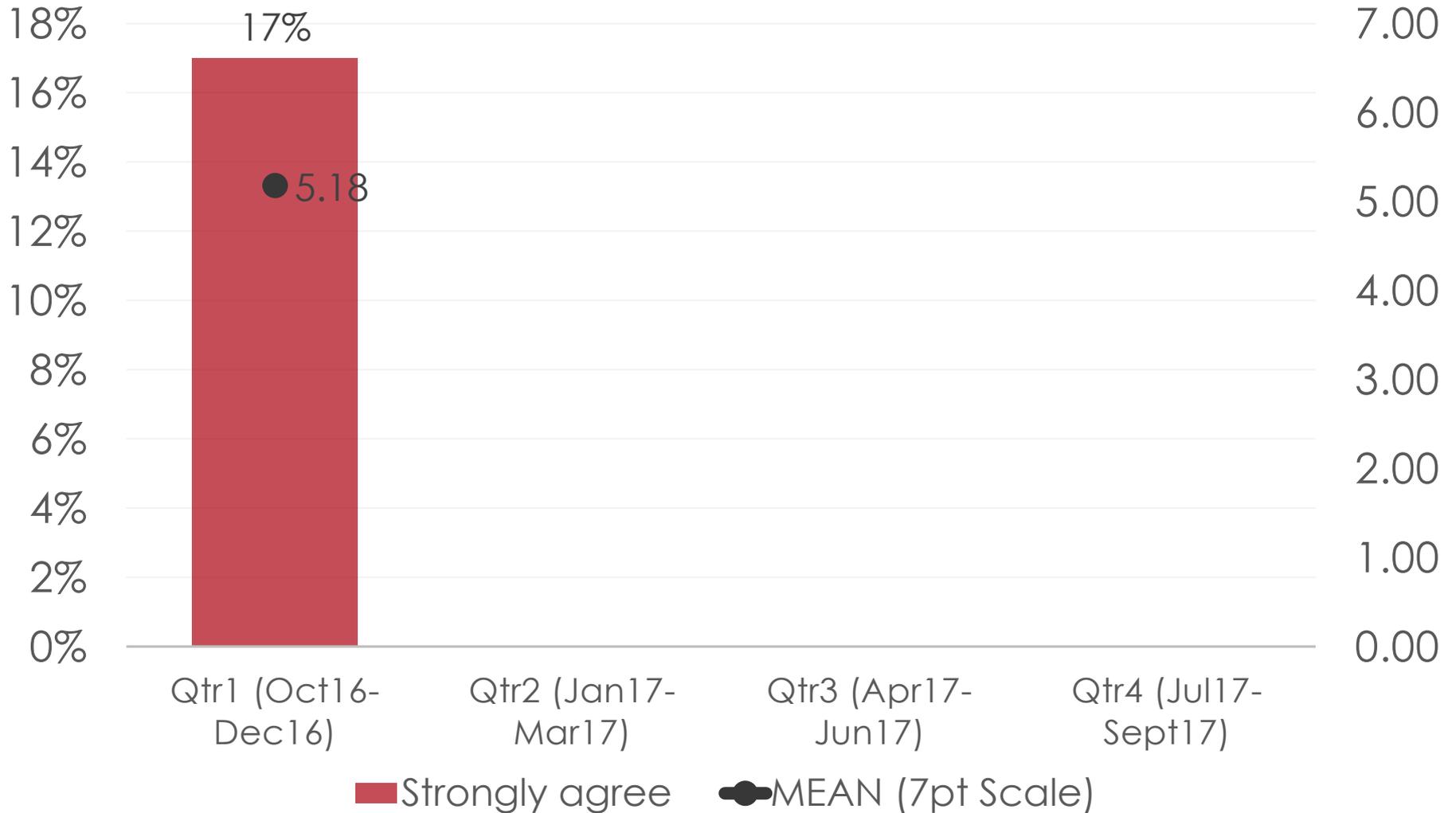
# Tour guides were professional



23%

●5.44

| | | | |
|---|---|---|---|
| Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |

■ Strongly agree    ●—MEAN (7pt Scale)

[A]

# Tour drivers were professional



Qtr1 (Oct16-Dec16): 23%, MEAN 5.48

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |

Legend: ■ Strongly agree    ●— MEAN (7pt Scale)

[A]

# Taxi drivers were professional



28%

●5.57

Qtr1 (Oct16-Dec16)   Qtr2 (Jan17-Mar17)   Qtr3 (Apr17-Jun17)   Qtr4 (Jul17-Sept17)

■ Strongly agree   ●━MEAN (7pt Scale)

[A]

# Taxis were clean



26%

5.47

Qtr1 (Oct16-Dec16)   Qtr2 (Jan17-Mar17)   Qtr3 (Apr17-Jun17)   Qtr4 (Jul17-Sept17)

Strongly agree   MEAN (7pt Scale)

[A]

# Guam airport was clean



18%

●5.12

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |

■Strongly agree ●MEAN (7pt Scale)

[A]

# GENERAL SATISFACTION



Ease of getting around — 15% — 4.99
Safety walking at night — 14% — 4.98
Price of things on Guam — 17% — 5.15

Very Satisfied (Top Box)　　MEAN (7pt Scale)

[A]

# GENERAL SATISFACTION –
## Quality/ Cleanliness



Legend: Very Satisfied (Top Box) | MEAN (7pt Scale)

| Category | Very Satisfied (Top Box) | MEAN (7pt Scale) |
|---|---|---|
| Beaches/ Parks | 27% | 5.70 |
| Air/ Sky | 42% | 6.01 |
| Parks | 30% | 5.77 |
| Landscape Tumon | 28% | 5.66 |
| Landscape Guam | 22% | 5.40 |
| Ground Handler | 14% | 4.45 |
| Transportation vehicle | 15% | 4.85 |

[A]
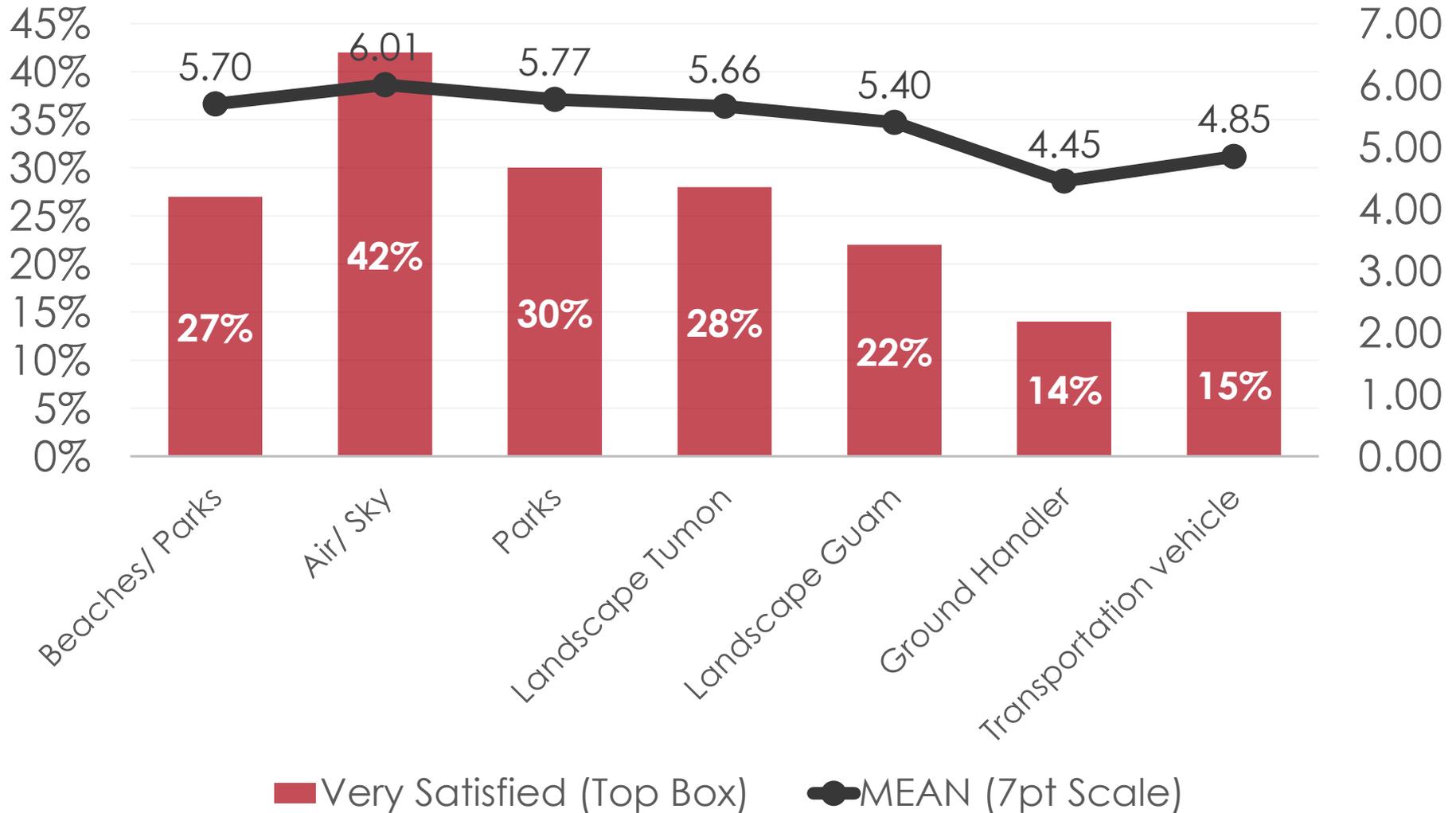
# ACCOMMODATIONS –
## OVERALL SATISFACTION



Chart showing Overall Satisfaction by quarter. Left axis: percentage (0%–30%). Right axis: 7pt scale (0.00–7.00).

- Qtr1 (Oct16-Dec16): Very Satisfied (Top Box) = 24%, MEAN (7pt Scale) = 5.48
- Qtr2 (Jan17-Mar17): no data
- Qtr3 (Apr17-Jun17): no data
- Qtr4 (Jul17-Sept17): no data

Legend: Very Satisfied (Top Box) — MEAN (7pt Scale)

[A]
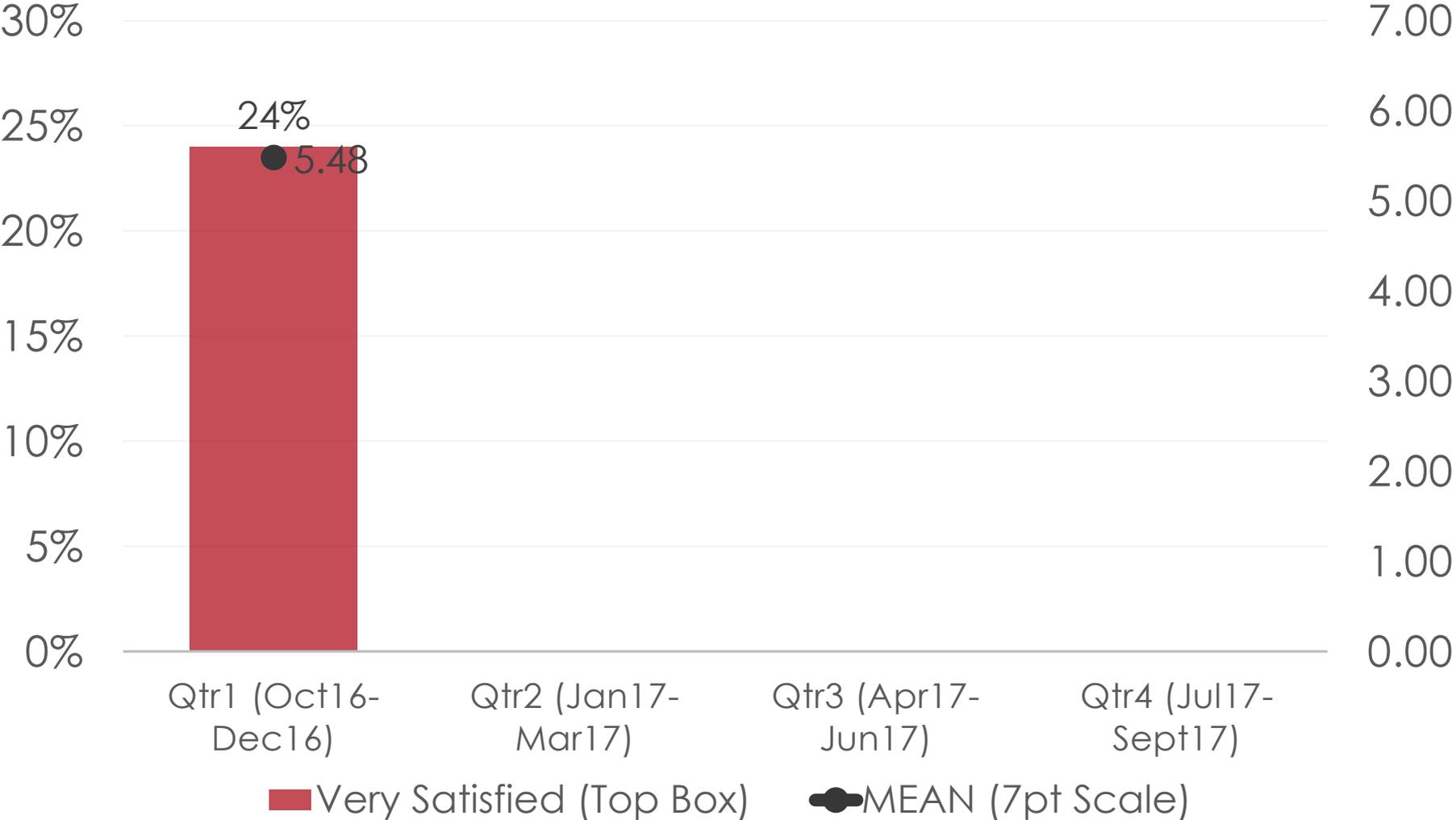
# ACCOMMODATIONS –
## Satisfaction by Category
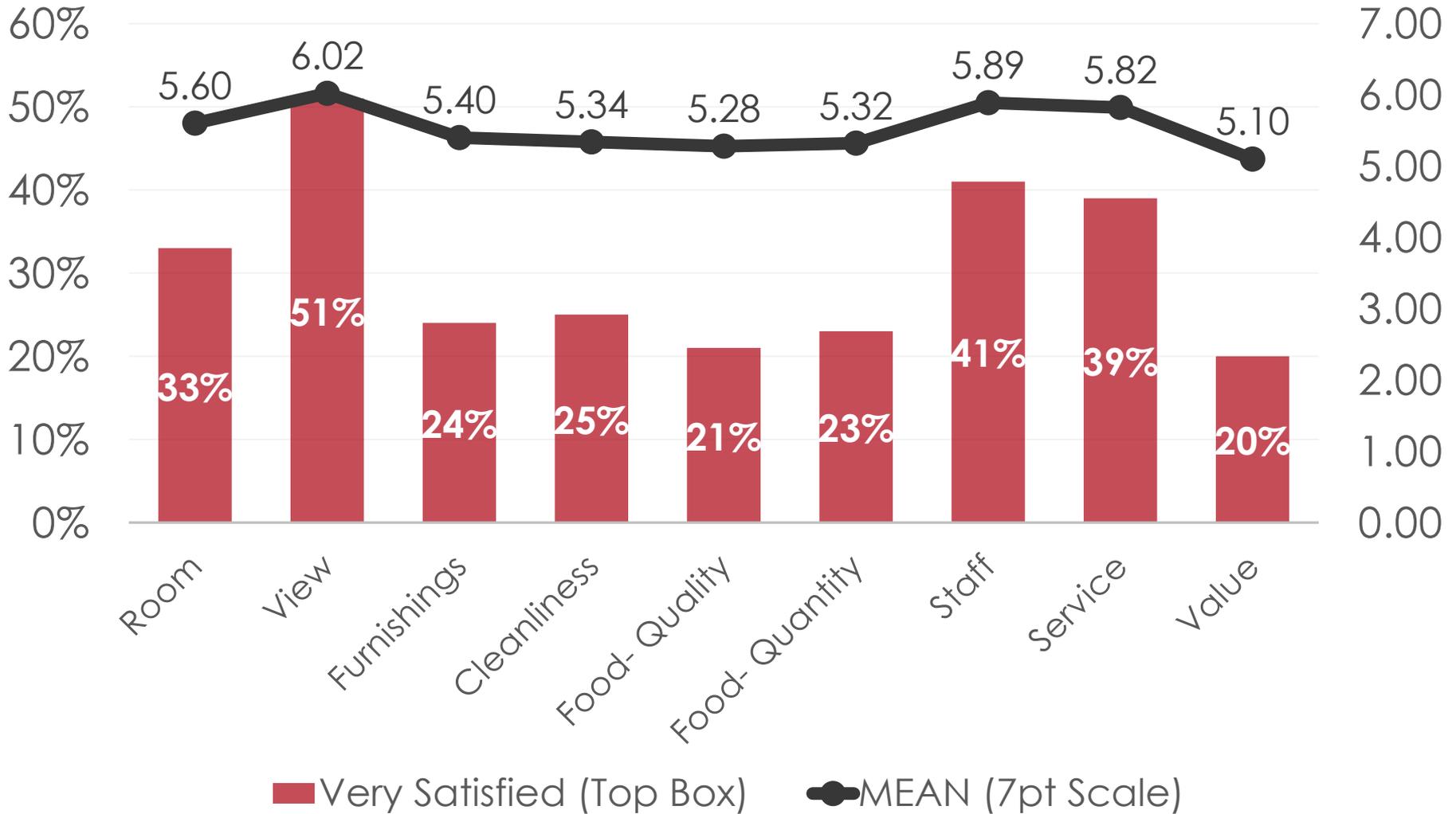
# DINING EXPERIENCE (Outside Hotel) –
## Satisfaction by Category



86
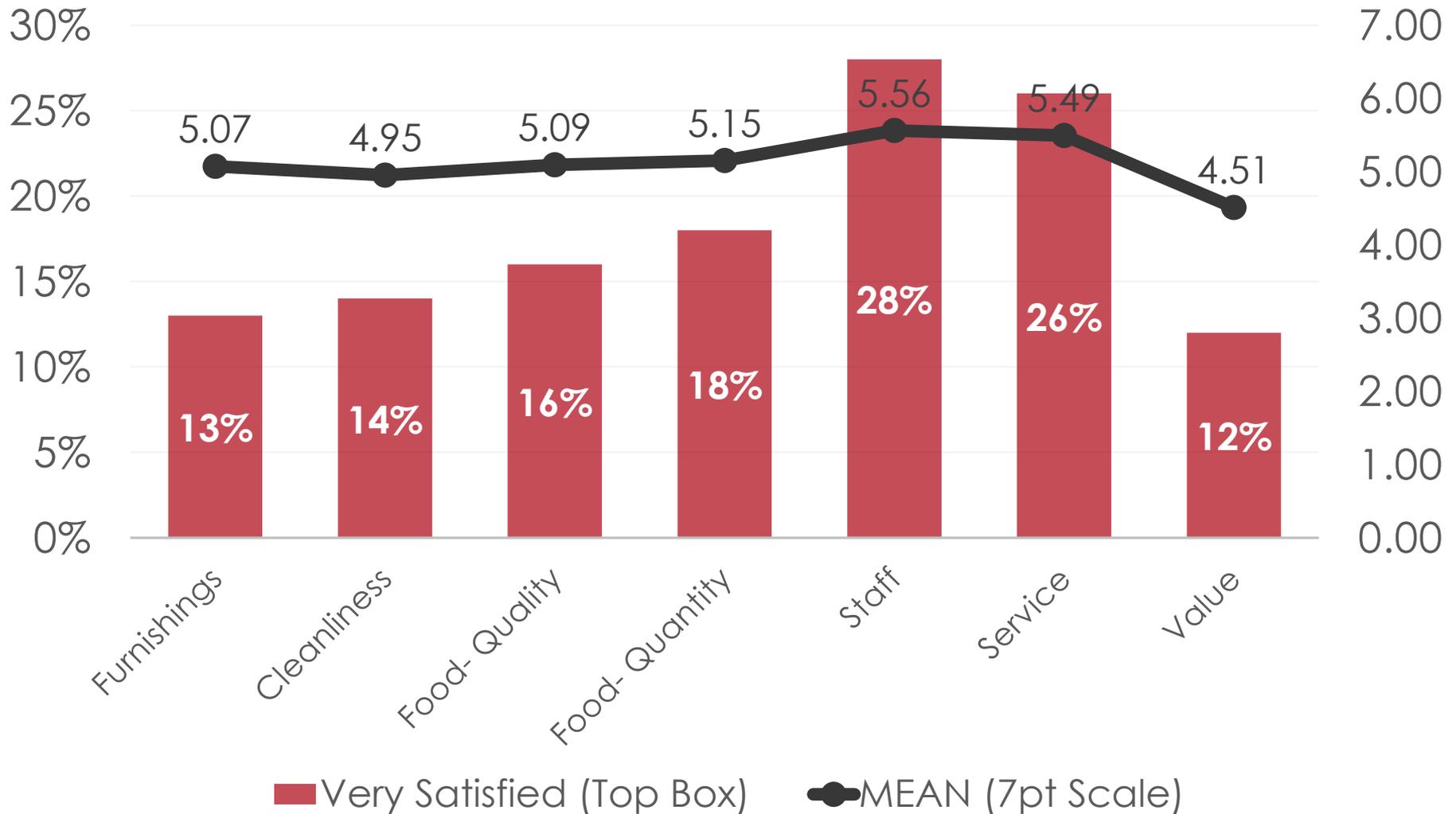
# Shopping Malls/ Stores (Top Responses)



| Store | Percentage |
|-------|-----------|
| Guam Premium Outlet | 72% |
| DFS Galleria | 71% |
| K-Mart | 63% |
| ABC Store | 62% |
| Ross | 50% |
| Micro Mall | 39% |
| Macys | 26% |
| JP Super | 18% |
| The Plaza | 16% |
| Tumon Sands | 15% |

[A]
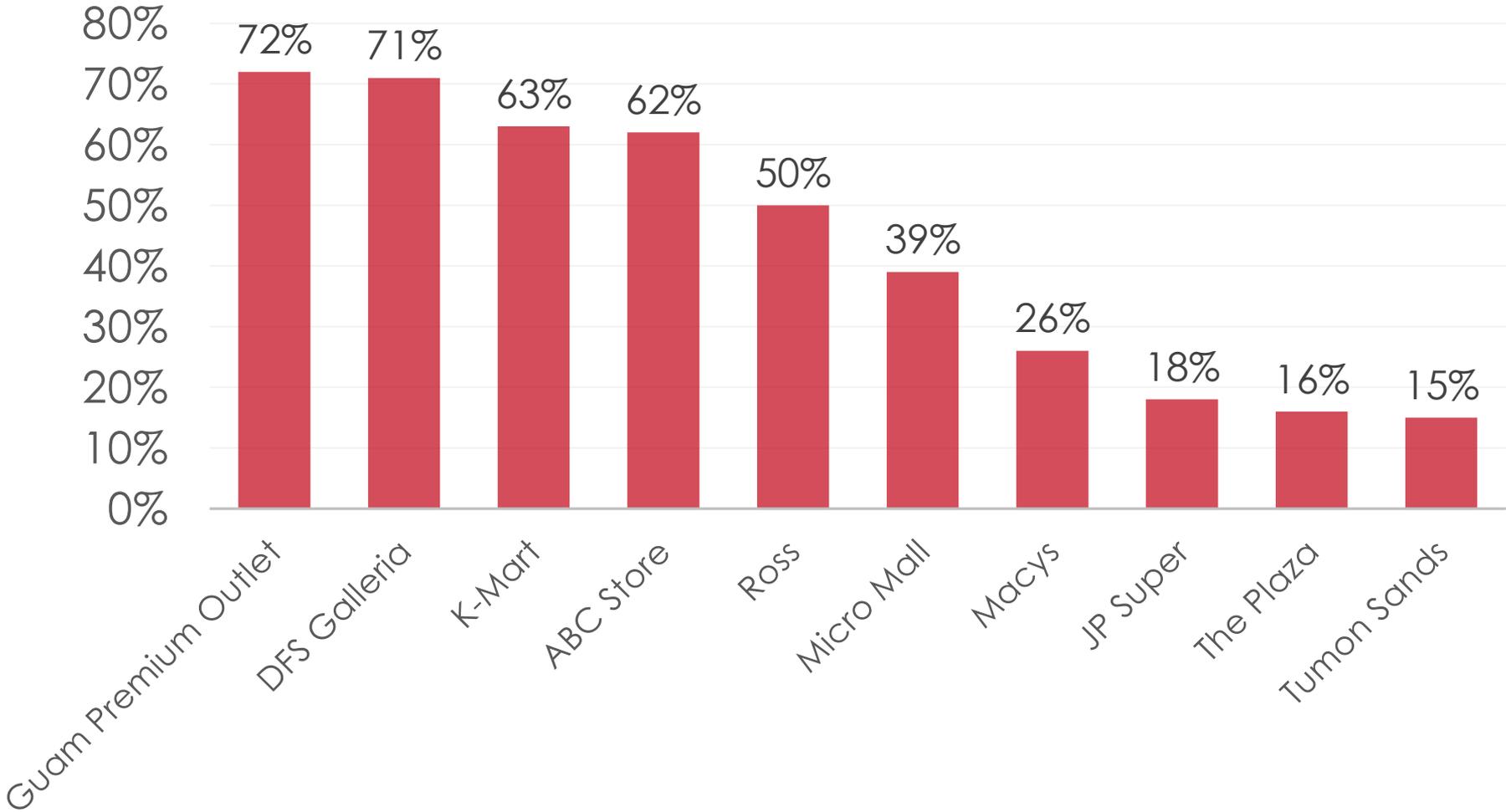
# SHOPPING - SATISFACTION
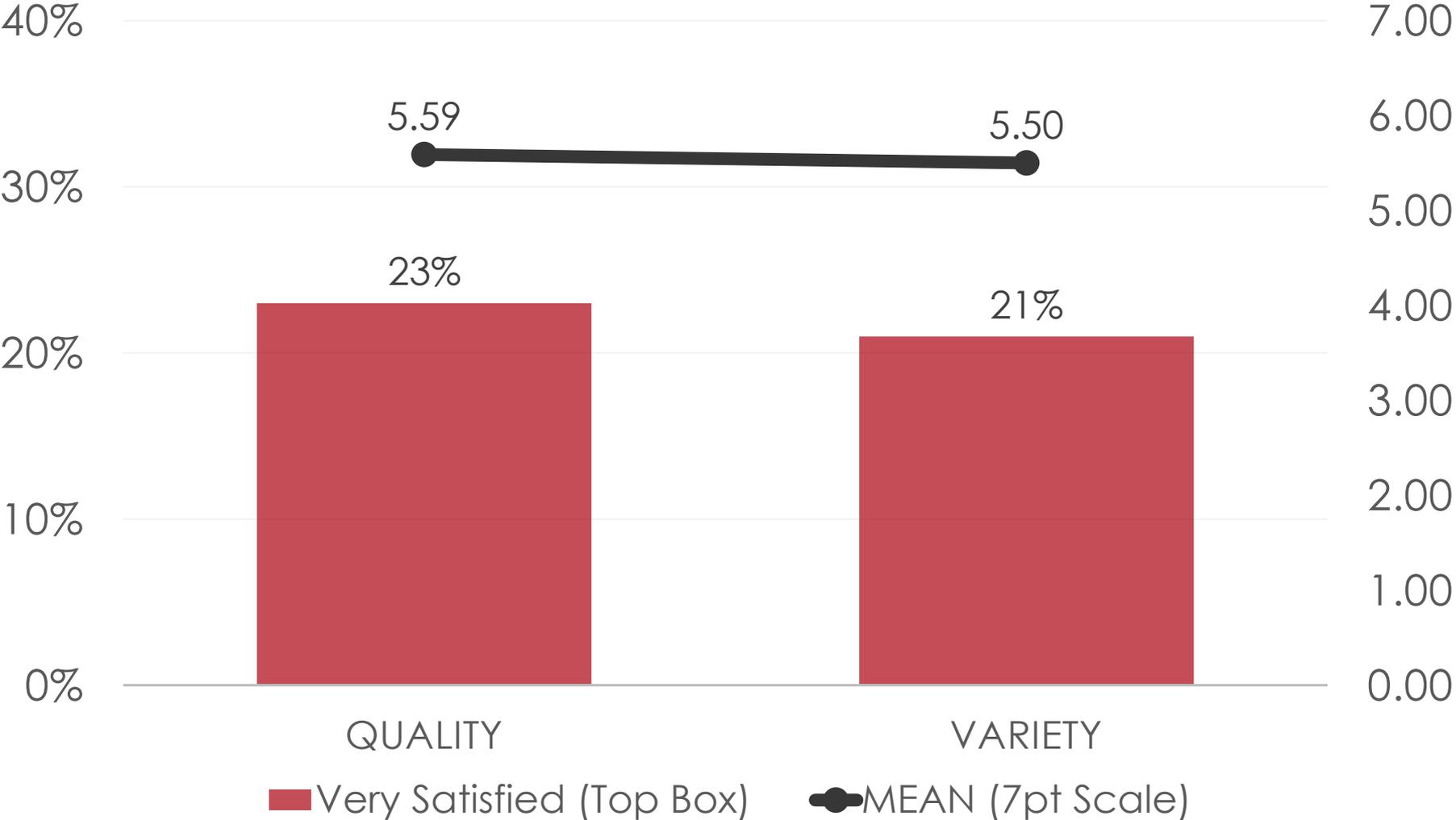
# OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

[A]
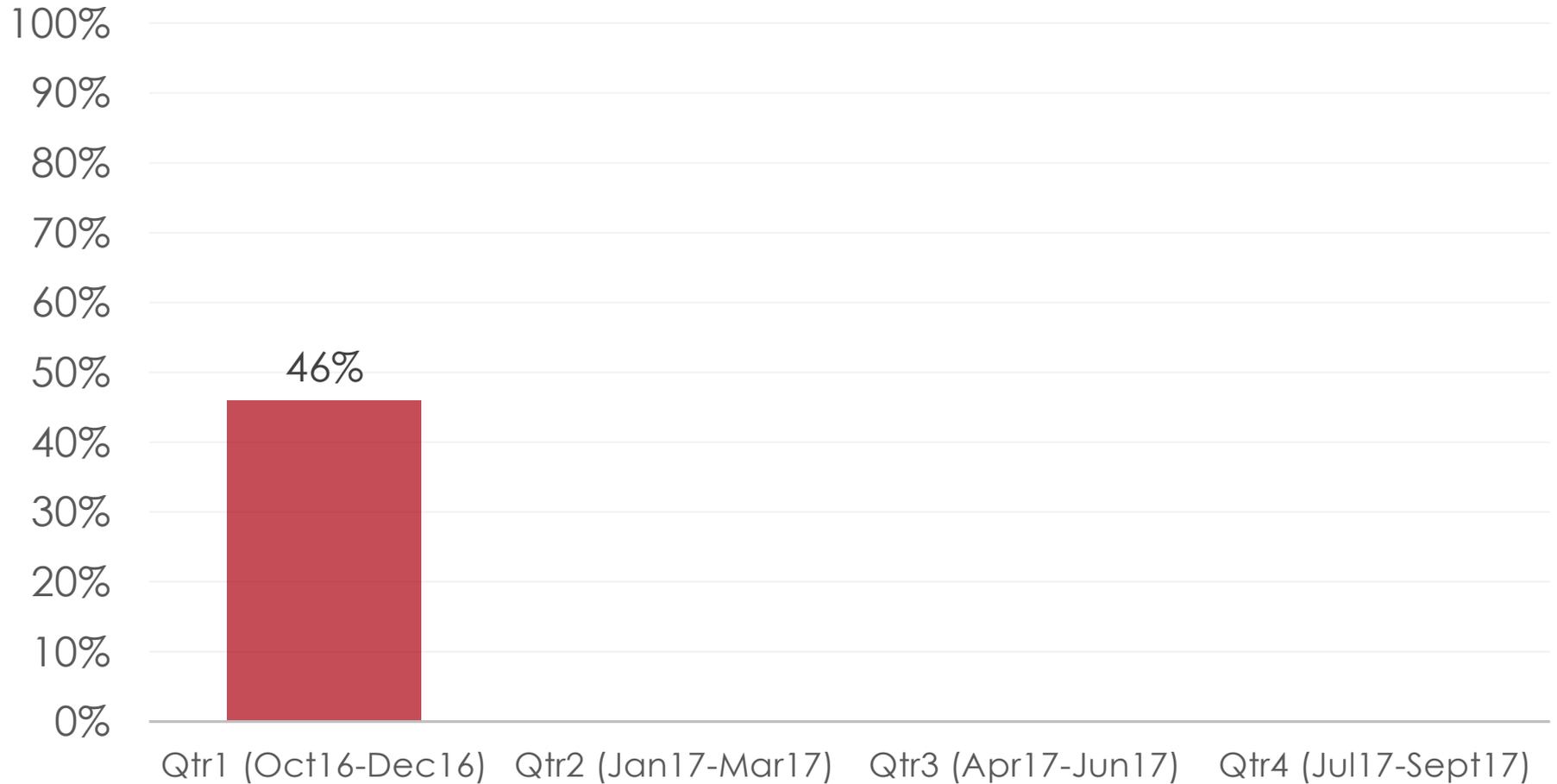
# Optional Tour Participation (Top Responses)

[A]
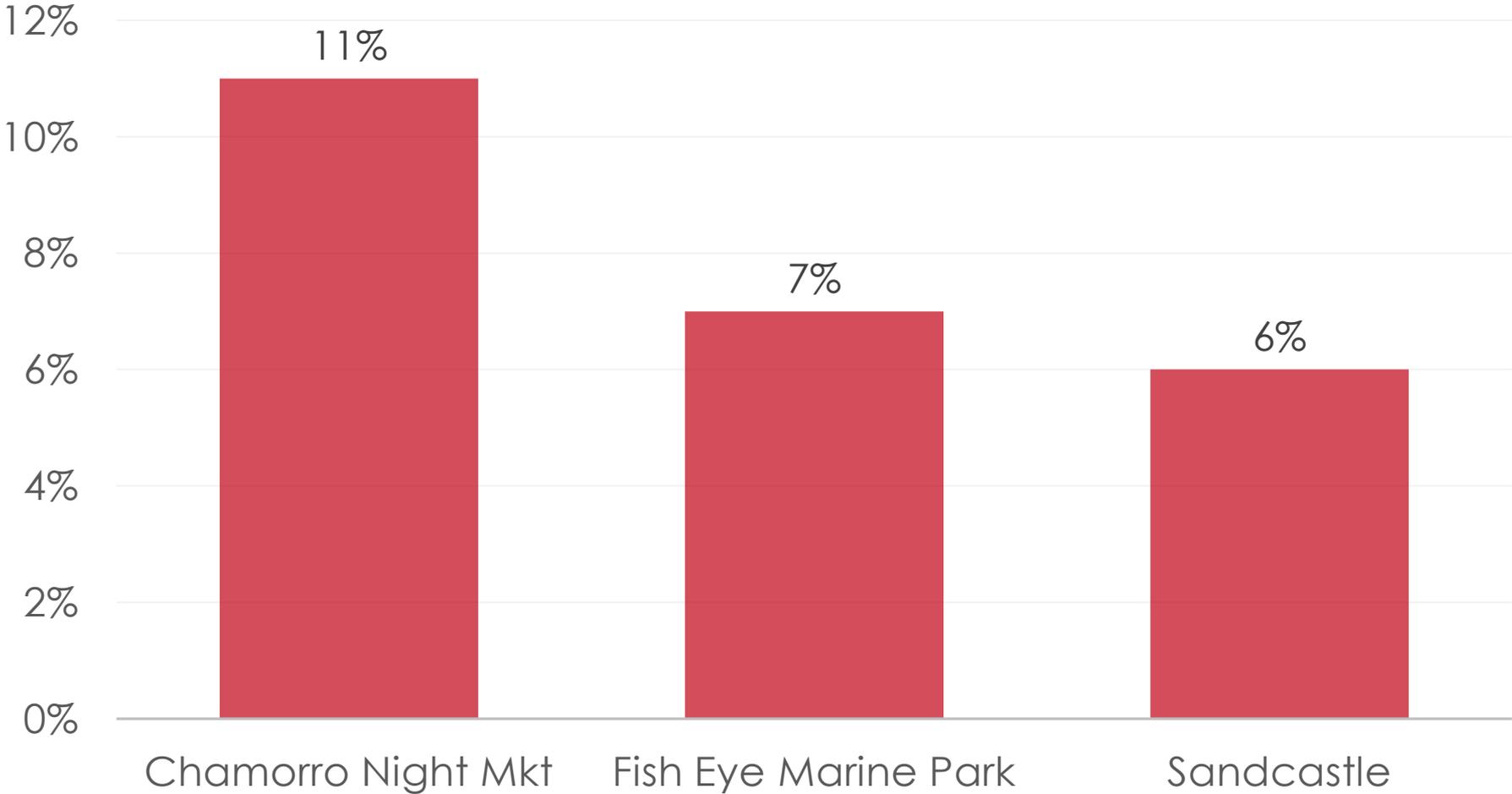
# Optional Tour Satisfaction
## Top Responses only - Participation (5%+)

Very Satisfied (Top Box) — MEAN (7pt Scale)

Chamorro Night Market: 24%, 5.09
Sandcastle: 57%, 6.29
Fish Eye Marine Park: 28%, 5.62

91

# DAY TOUR - SATISFACTION



QUALITY — 5.37, 18%
VARIETY — 5.24, 17%

Legend: Very Satisfied (Top Box) ● MEAN (7pt Scale)

[A]
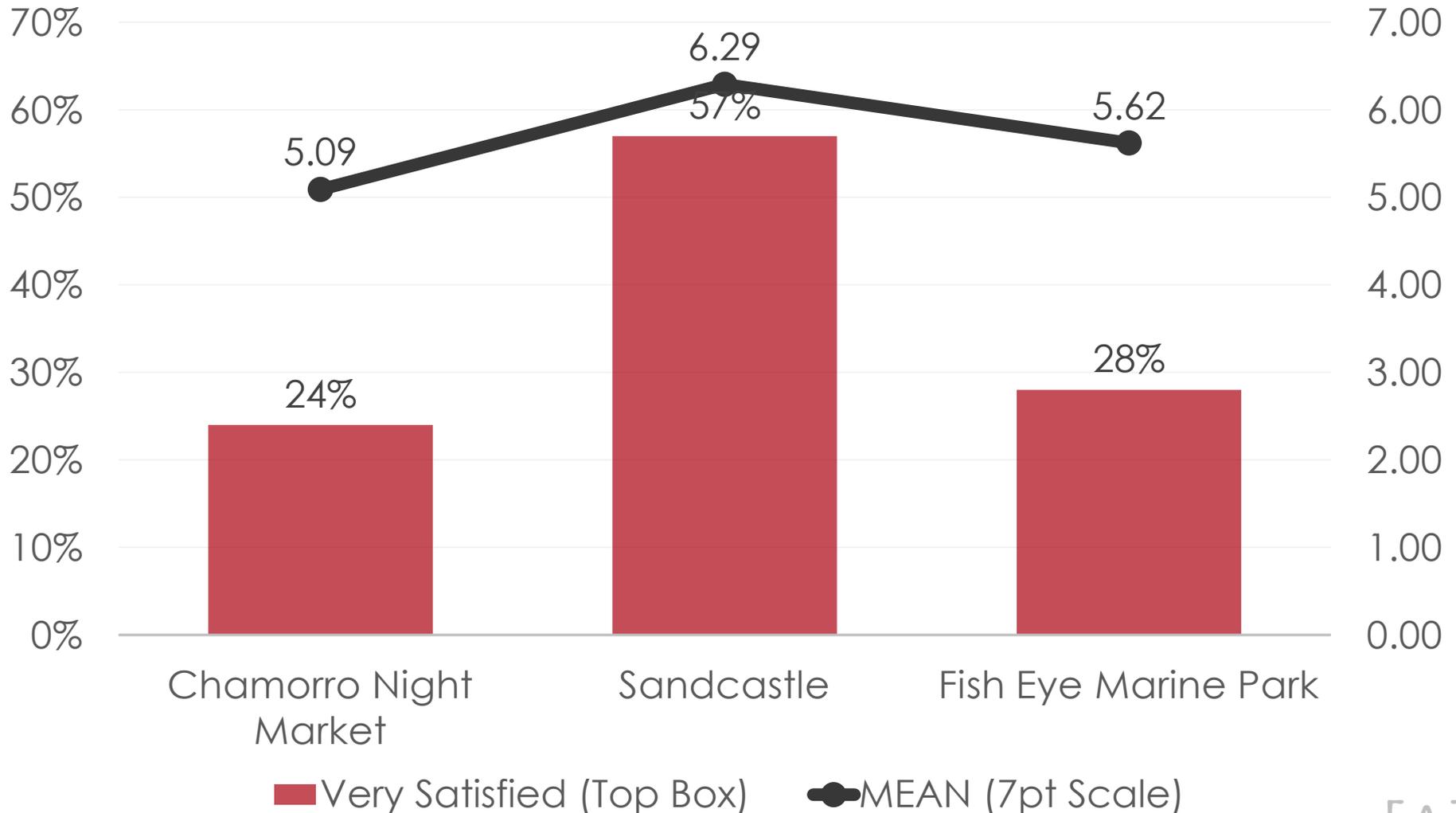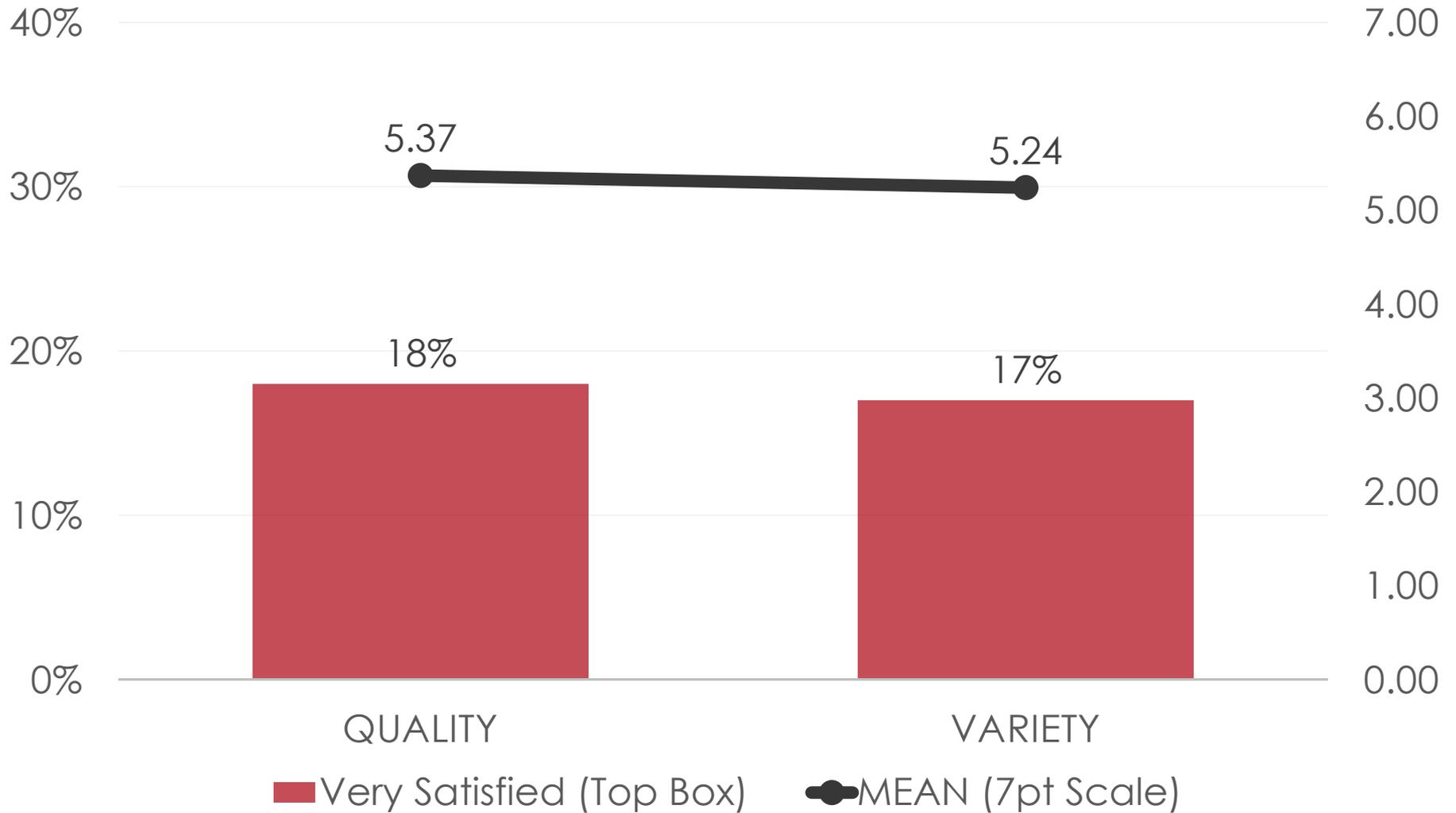
# NIGHT TOUR - SATISFACTION
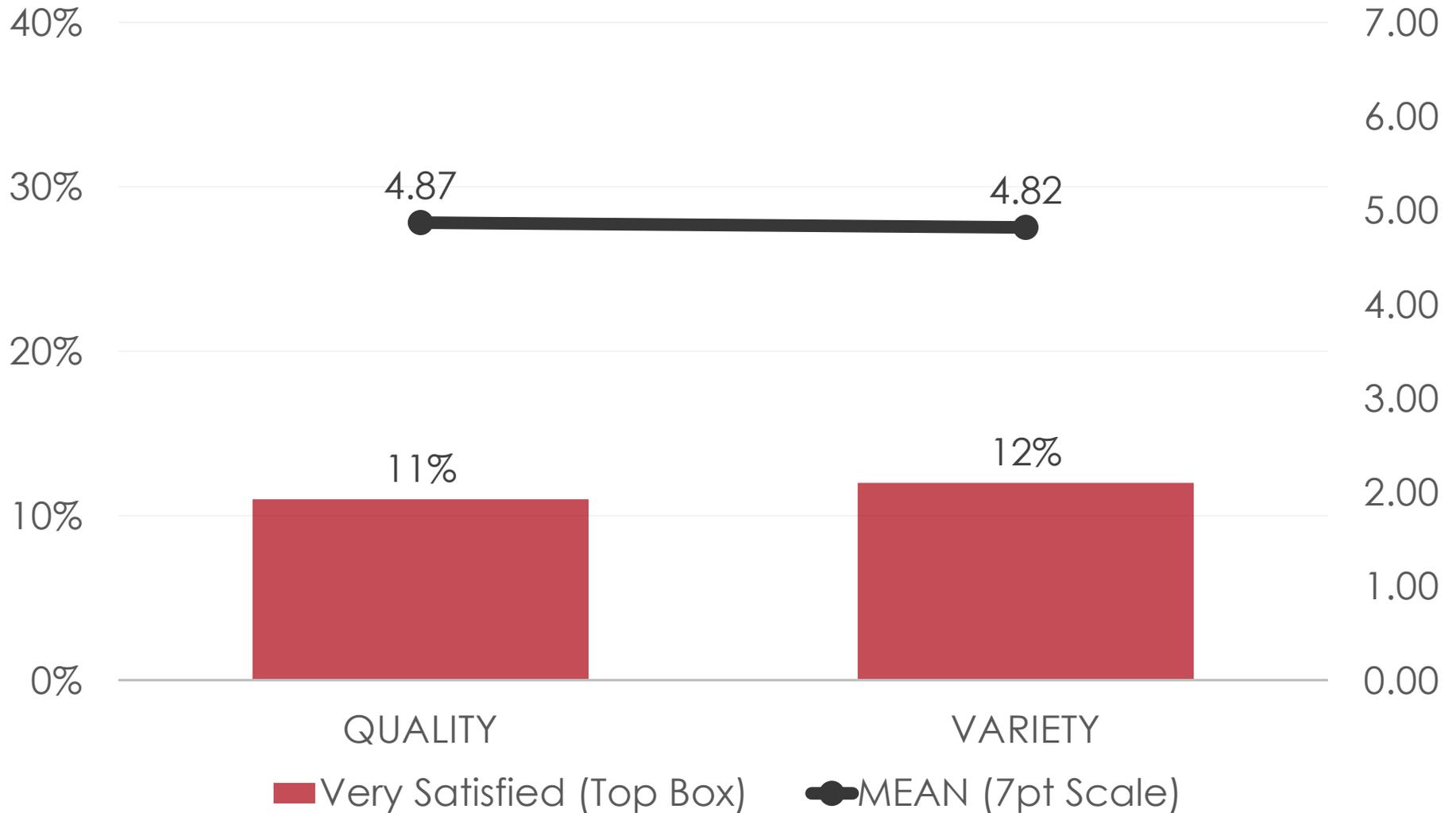
# Activities Participation (Top Responses)

[A]
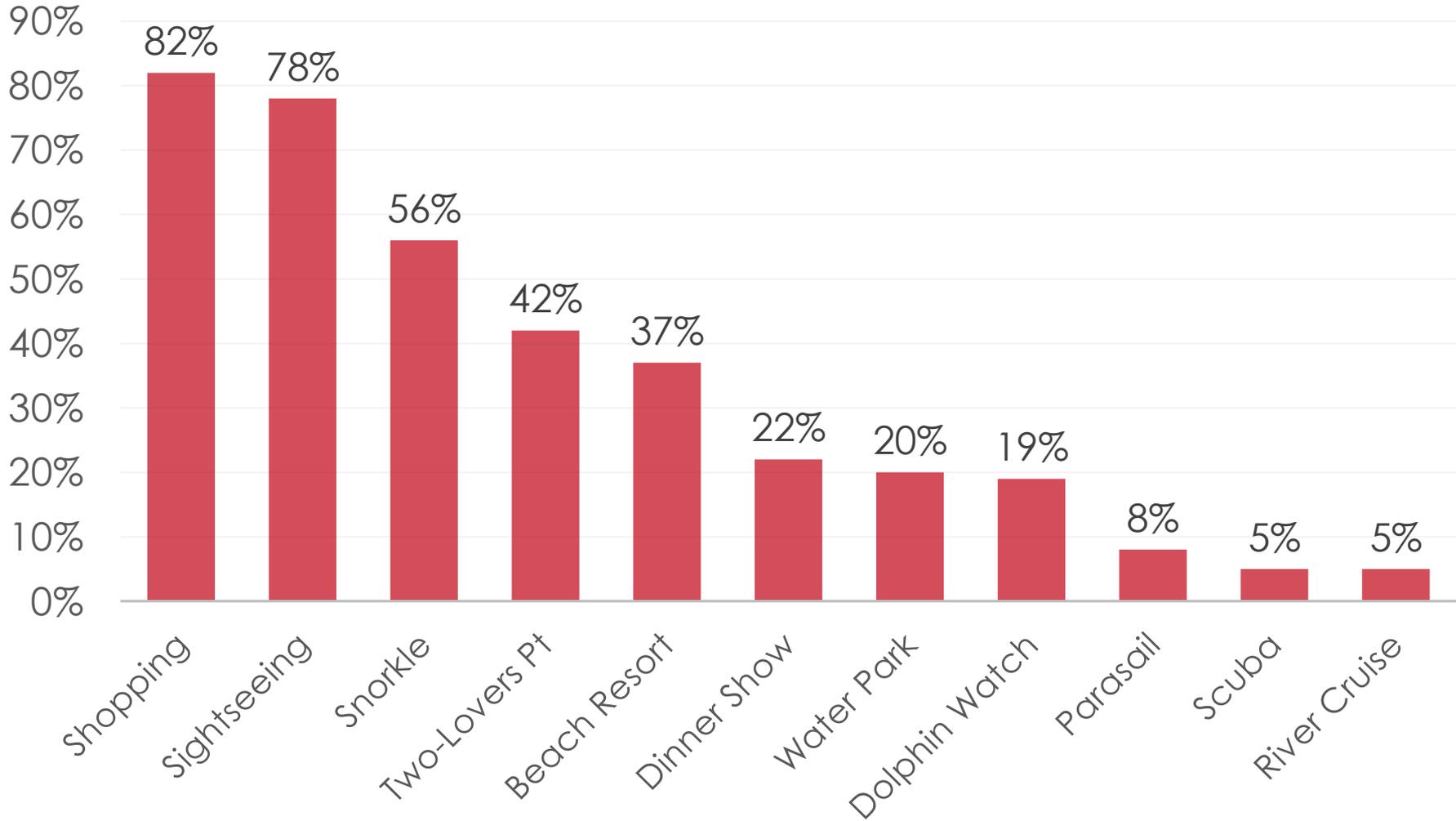
# SECTION 5
# PROMOTIONS

[A]

# INTERNET- GUAM SOURCES OF INFORMATION

[A]
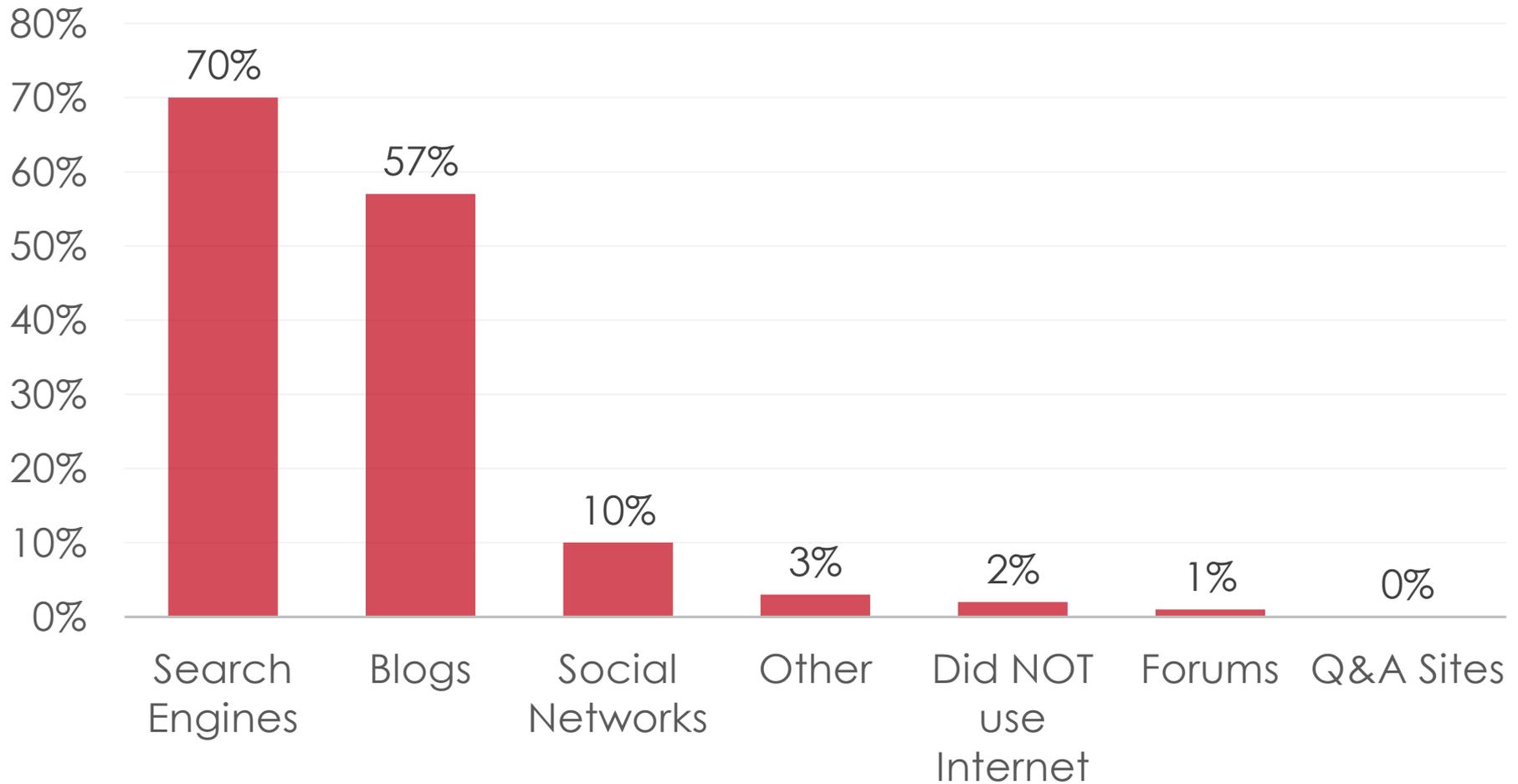
# INTERNET- SOURCES OF INFORMATION
## Things to do on Guam

[A]
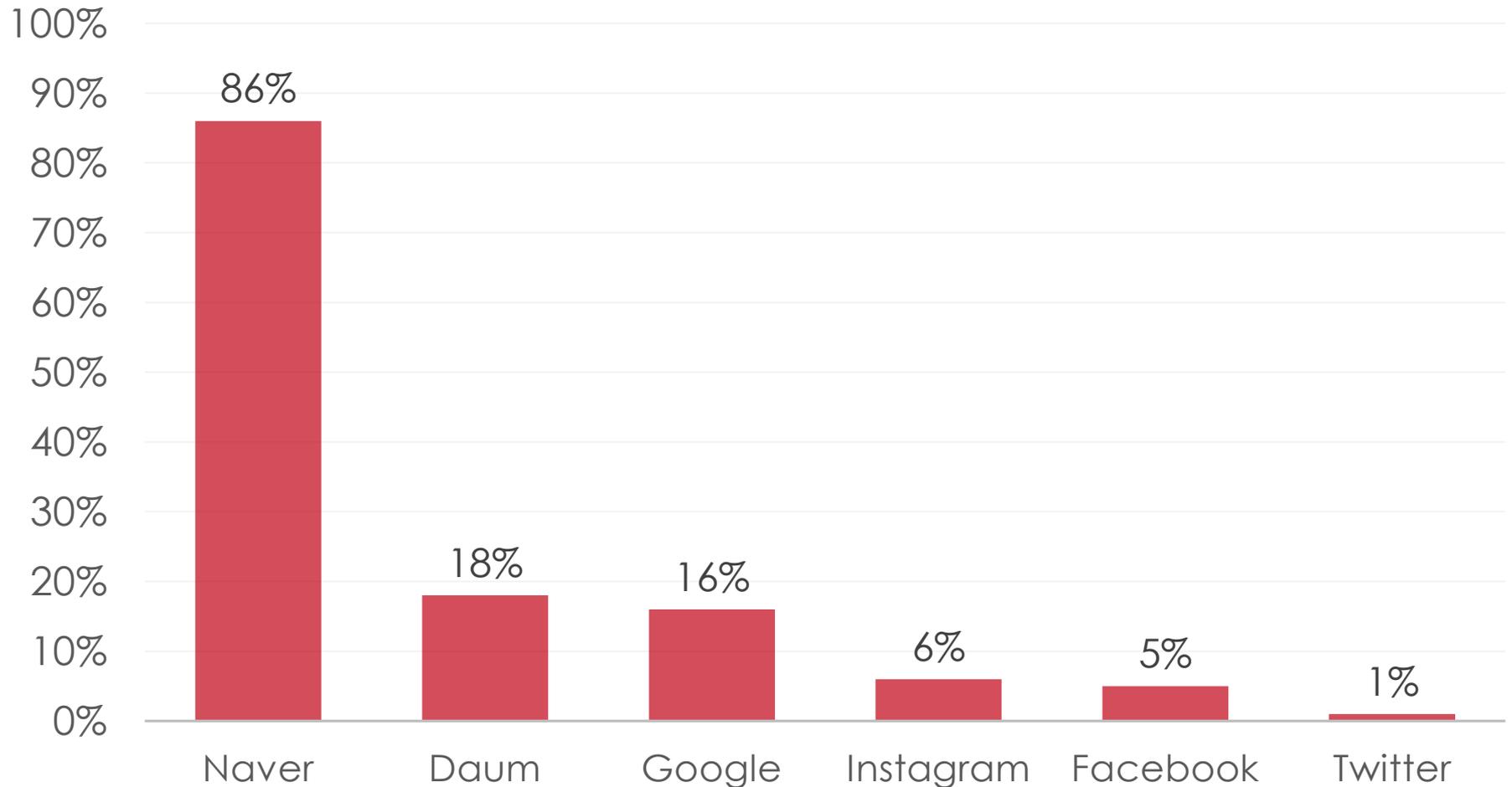
# INTERNET- SOURCES OF INFORMATION GVB

[A]
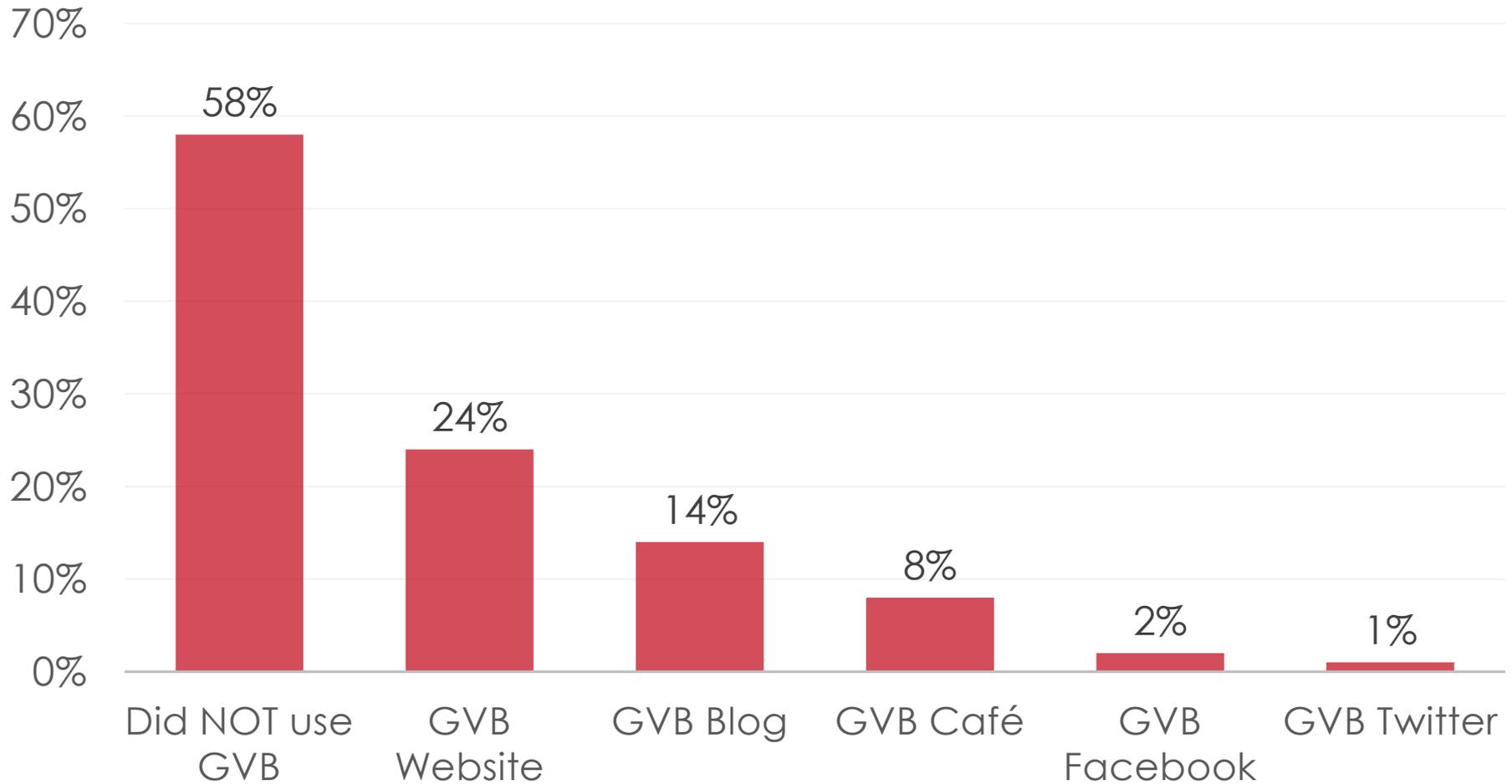
# TRAVEL MOTIVATION

# PRE-ARRIVAL SOURCES OF INFOMATION

[A]
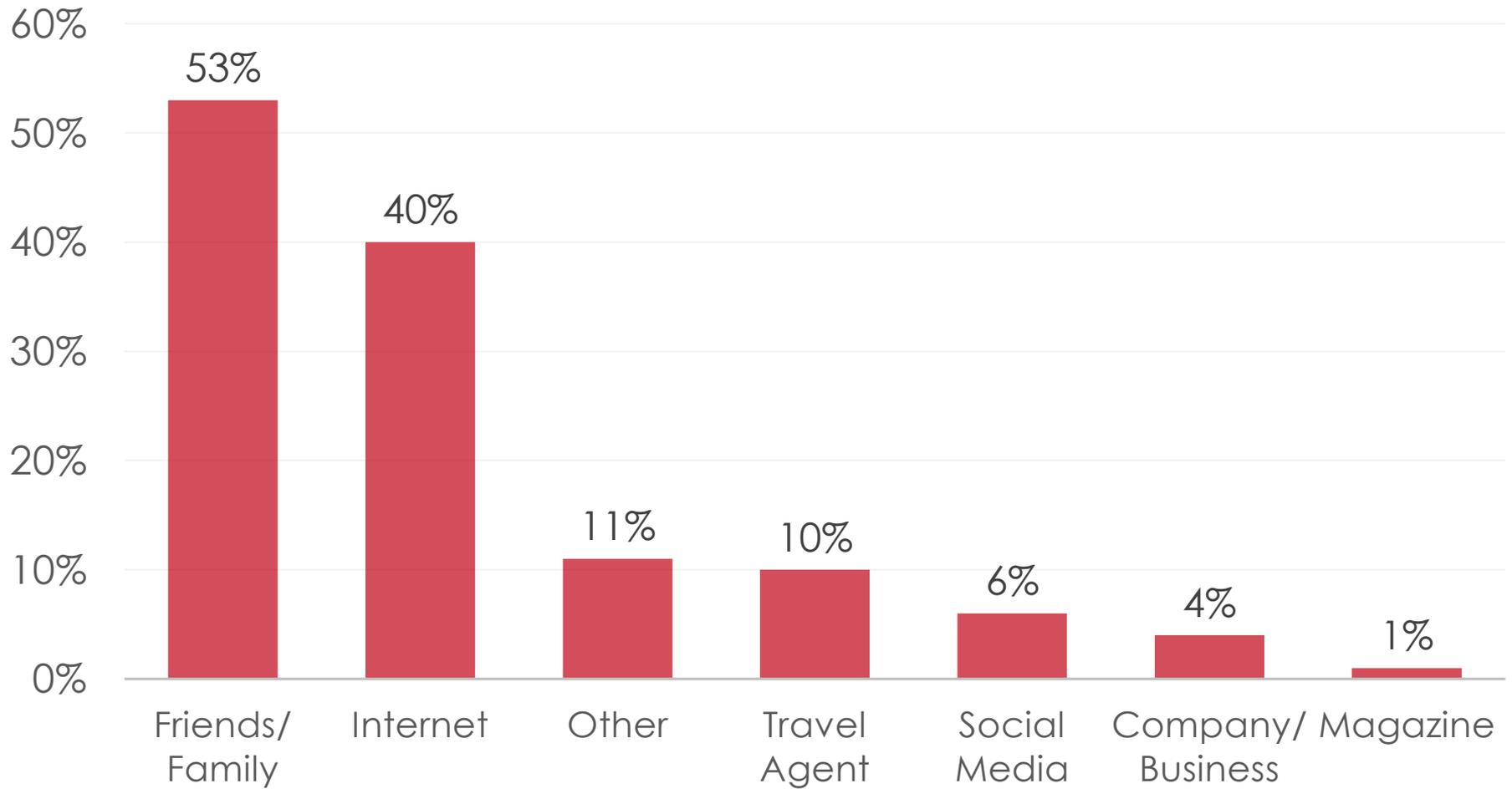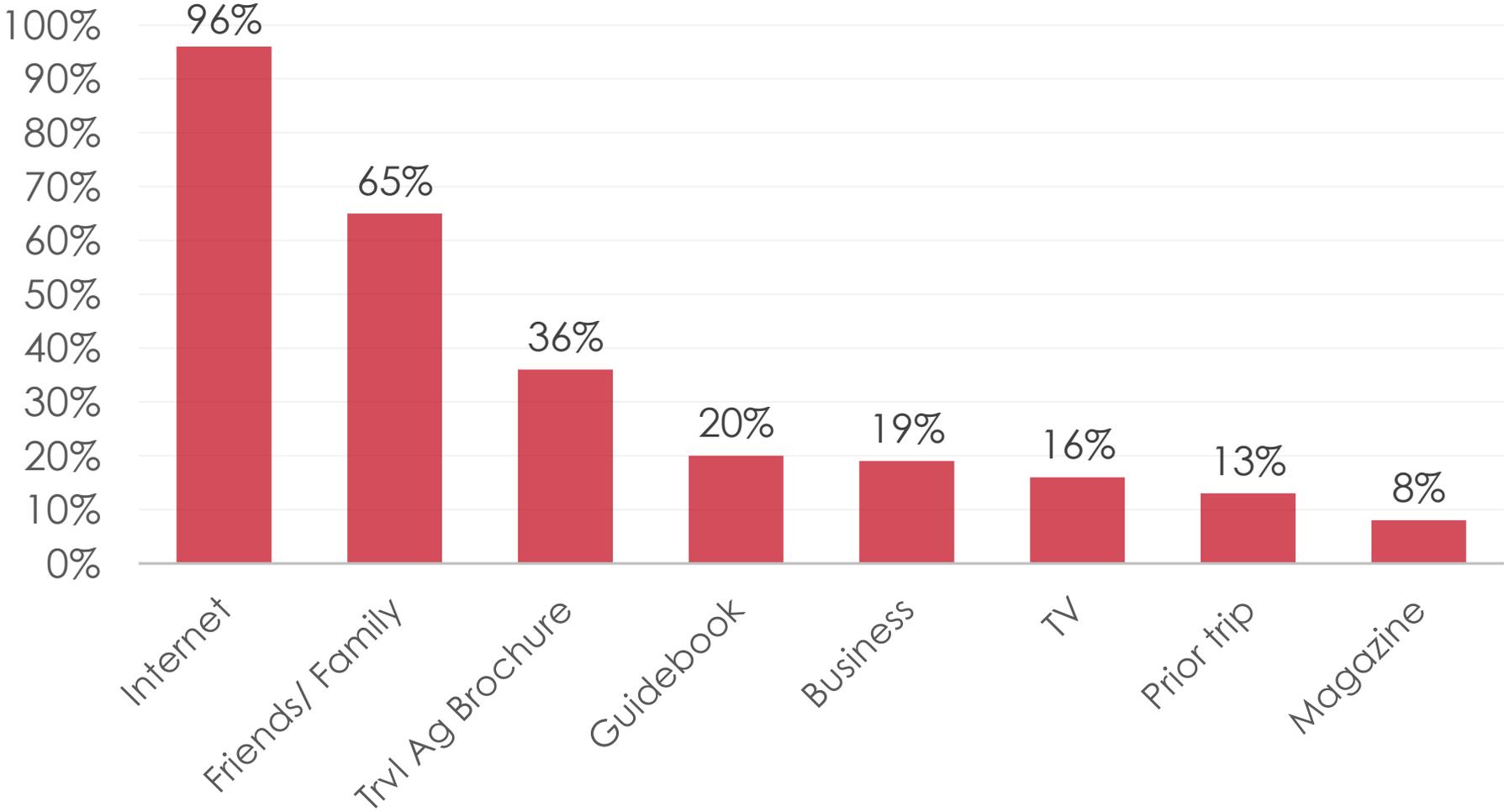
# PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

**GUAM VISITORS BUREAU - EXIT SURVEY**

**Q1 Please select the top 3 sources of information you used to find out about Guam before you trip.**

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| Q1 | Internet | 96% | 97% | 93% | 98% | 100% | 97% | 96% | 100% | 93% |
| | Friend/ Relative | 65% | 59% | 32% | 65% | 67% | 65% | 64% | 80% | 45% |
| | Travel Agent Brochure | 36% | 20% | 56% | 57% | 67% | 37% | 39% | 40% | 25% |
| | Travel Guidebook-Bookstore | 20% | 30% | 5% | 22% | 50% | 21% | 18% | | 12% |
| | Co-Worker/ Company Trvl Dept | 19% | 14% | 44% | 18% | 17% | 19% | 18% | 20% | 7% |
| | TV | 16% | 18% | 12% | 11% | | 16% | 17% | 40% | 14% |
| | Prior Trip | 13% | 20% | 15% | 1% | | 12% | 13% | 20% | 91% |
| | Magazine (Consumer) | 8% | 7% | 7% | 5% | | 8% | 7% | | 5% |
| | Newspaper | 5% | 1% | | 3% | | 5% | 6% | | |
| | GVB Office | 3% | 8% | | 2% | | 3% | 4% | | 4% |
| | Travel Trade Show | 1% | 1% | 5% | | | 1% | 1% | | 2% |
| | Consumer Trvl Show | 1% | 1% | 2% | | | 1% | 1% | | |
| | GVB Promo | 1% | | | 2% | | 1% | 1% | | |
| | Other | 1% | 1% | | 1% | | 1% | 1% | | |
| | Radio | 0% | 1% | | | | 0% | 0% | | 1% |
| | Total | 1045 | 148 | 41 | 88 | 6 | 936 | 834 | 5 | 152 |

Prepared by QMark Research

[A]

# ONISLE
# SOURCES OF INFOMATION

[A]
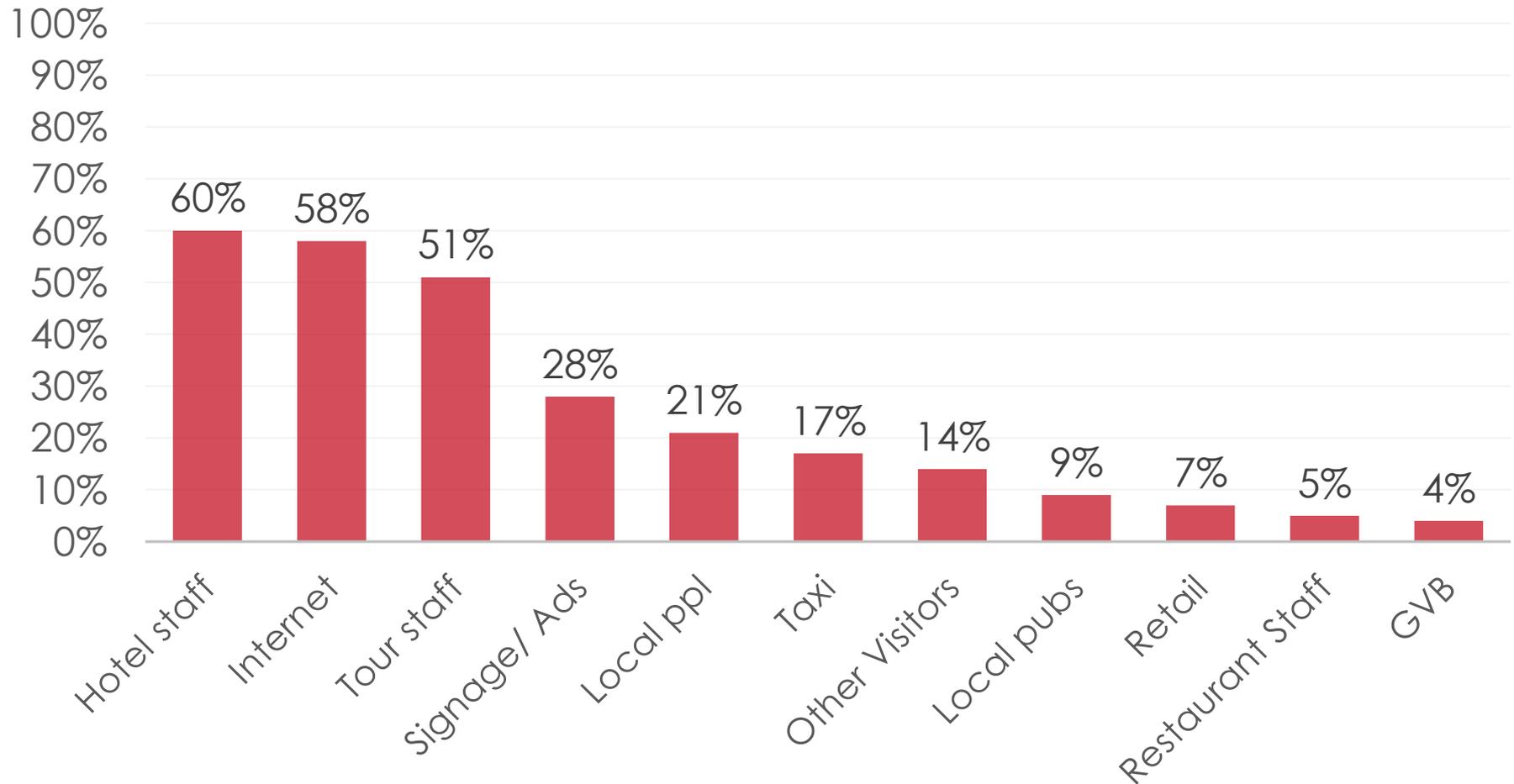
# ON-ISLE
# SOURCES OF INFORMATION –
## Key Segments

**GUAM VISITORS BUREAU - EXIT SURVEY**

**Q2  Please select the top 3 sources of information you used to find out about Guam while you were here.**

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| Q2 | Hotel Staff | 60% | 60% | 57% | 56% | 50% | 60% | 60% | 40% | 65% |
| | Internet | 58% | 76% | 48% | 65% | 83% | 59% | 59% | 20% | 65% |
| | Tour Staff | 51% | 12% | 80% | 49% | 67% | 52% | 50% | 20% | 38% |
| | Signs/ Advertisement | 28% | 22% | 23% | 26% | | 28% | 27% | 60% | 23% |
| | Local Ppl | 21% | 18% | 8% | 22% | | 20% | 19% | | 19% |
| | Taxi Driver | 17% | 19% | 10% | 16% | 17% | 16% | 17% | | 18% |
| | Other Visitors | 14% | 19% | 23% | 19% | | 14% | 15% | 60% | 13% |
| | Local Publication | 9% | 10% | 15% | 10% | | 9% | 9% | | 7% |
| | Retail Staff | 7% | 10% | 10% | 10% | 33% | 7% | 8% | | 8% |
| | Restaurant Staff | 5% | 8% | 8% | 5% | 17% | 6% | 6% | | 5% |
| | GVB | 4% | 5% | 5% | 5% | | 3% | 4% | 20% | 4% |
| | Other | 3% | 3% | 3% | 5% | 17% | 3% | 3% | 20% | 4% |
| | Visitor Channel | 3% | 1% | | 3% | | 2% | 3% | | 8% |
| | Total | 1036 | 146 | 40 | 88 | 6 | 928 | 828 | 5 | 149 |

Prepared by QMark Research

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# SECTION 6
# FUTURE TRAVEL TO GUAM

[A]

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



No
33%

Yes
67%

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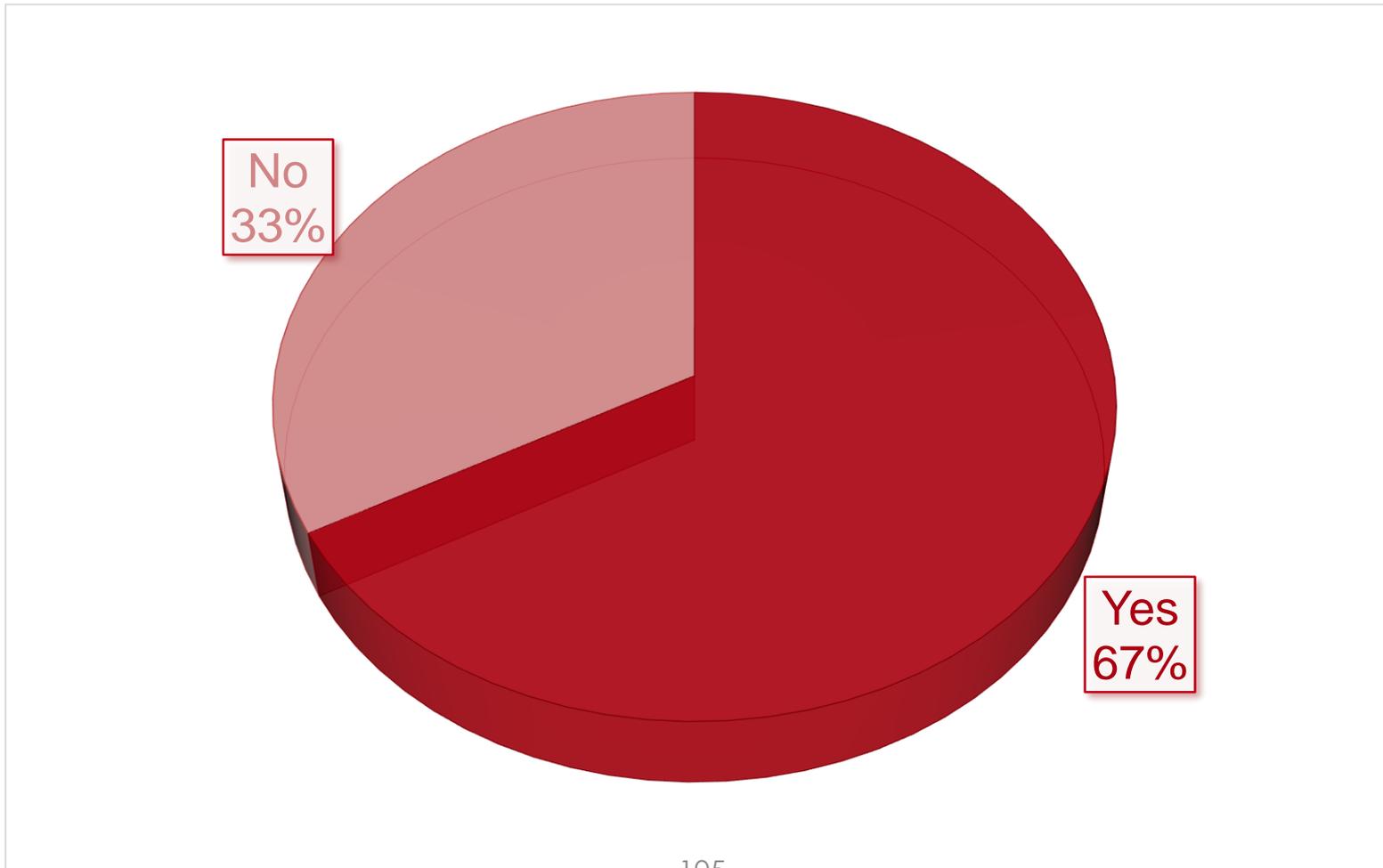
# What would it take to make you stay an extra day on Guam?



| Category | Percentage |
|---|---|
| Nothing | 95% |
| More time | 3% |
| Budget/Money | 2% |
| Flight schedule | 1% |
| More things to do | 1% |
| Less restrictions | 0% |

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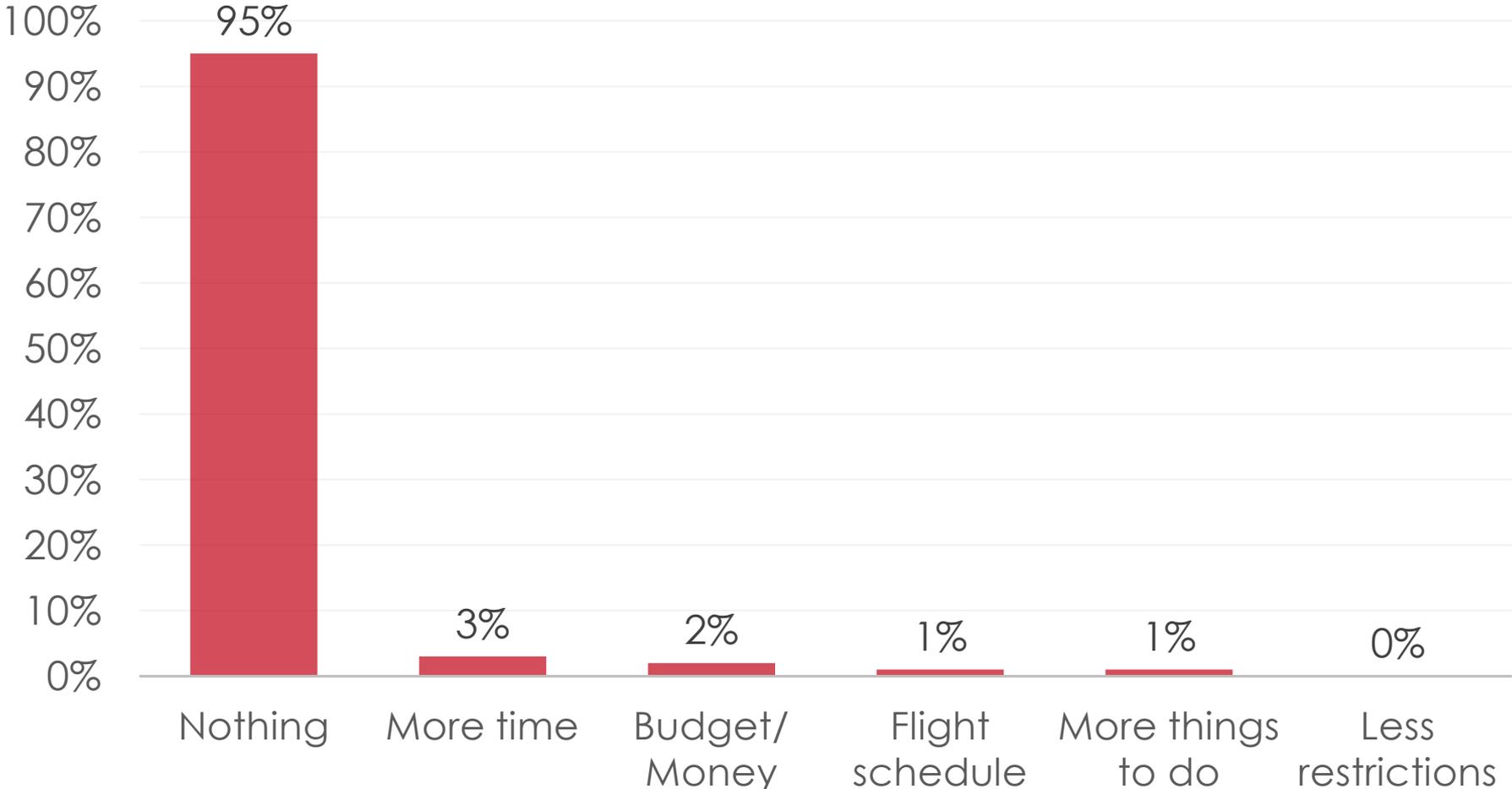
# FUTURE TRAVEL CONCERNS

[A]
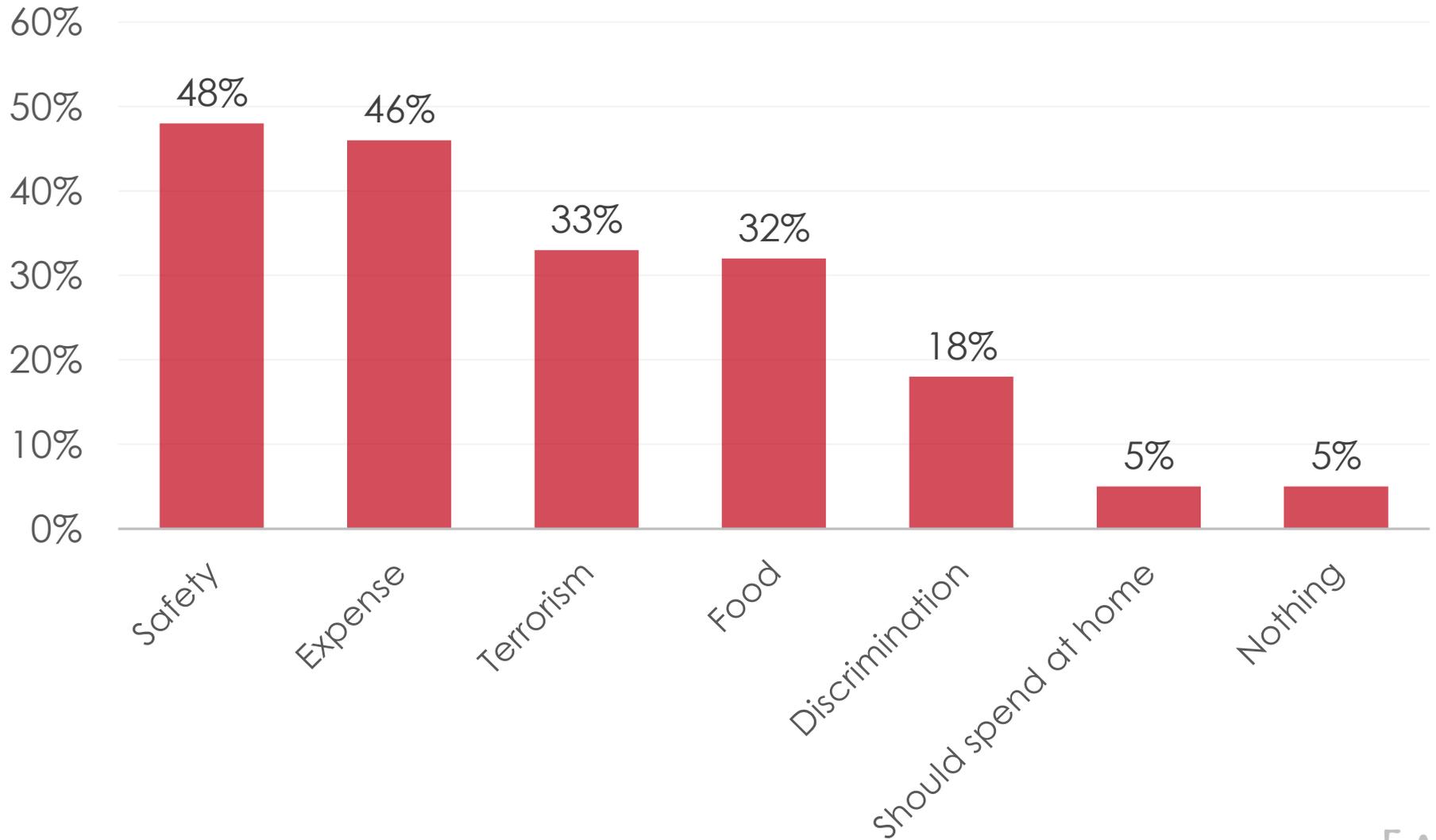
# SECTION 7
# GUAM CULTURE

[A]

# EXPERIENCED-CHAMORRO/ HAFA ADAI SPIRIT
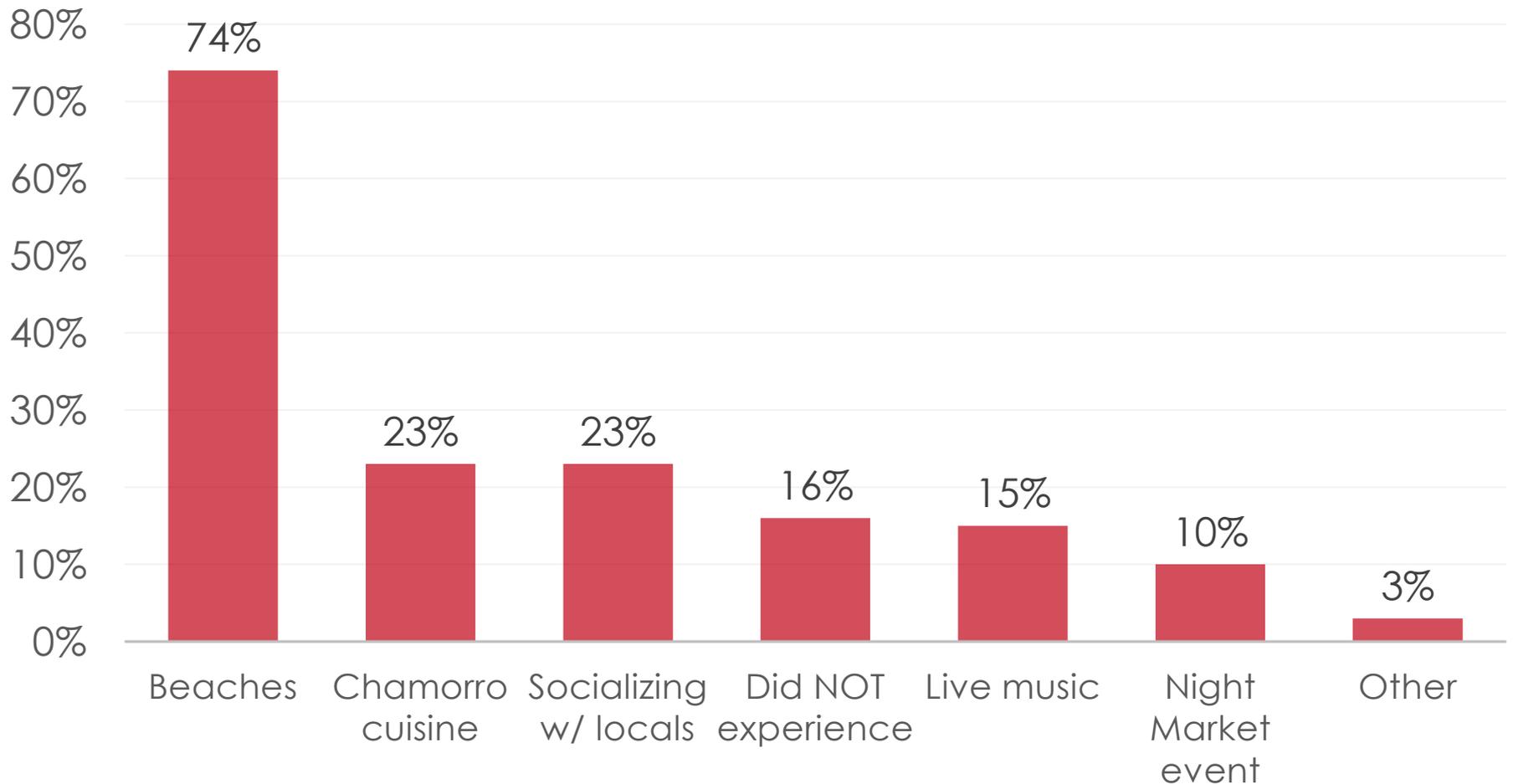
# EXPERIENCED-
# OTHER CULTURAL ACTIVITY/EVENTS

[A]
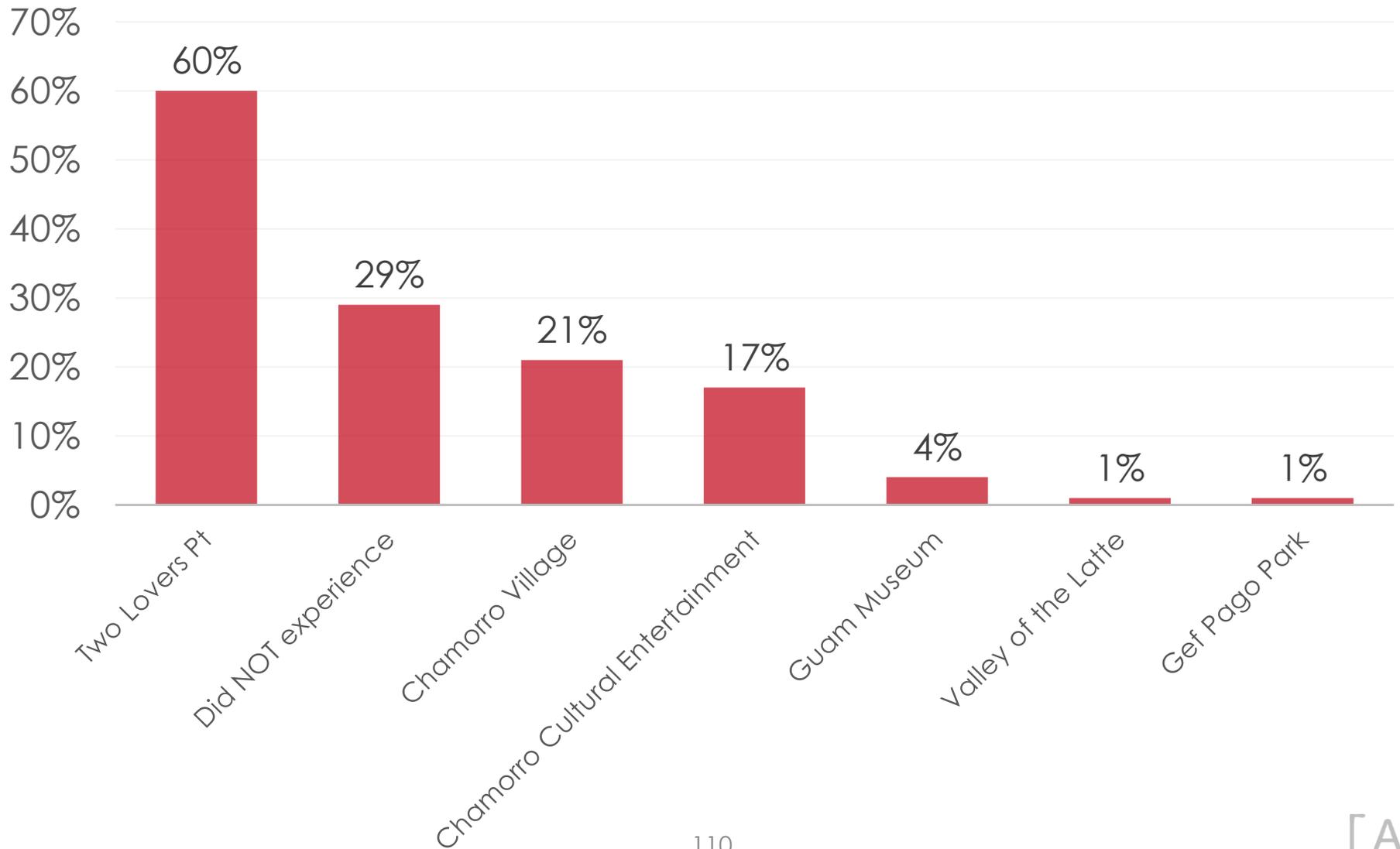
# SOURCES OF INFORMATION-CULTURAL ACTIVITY/EVENTS
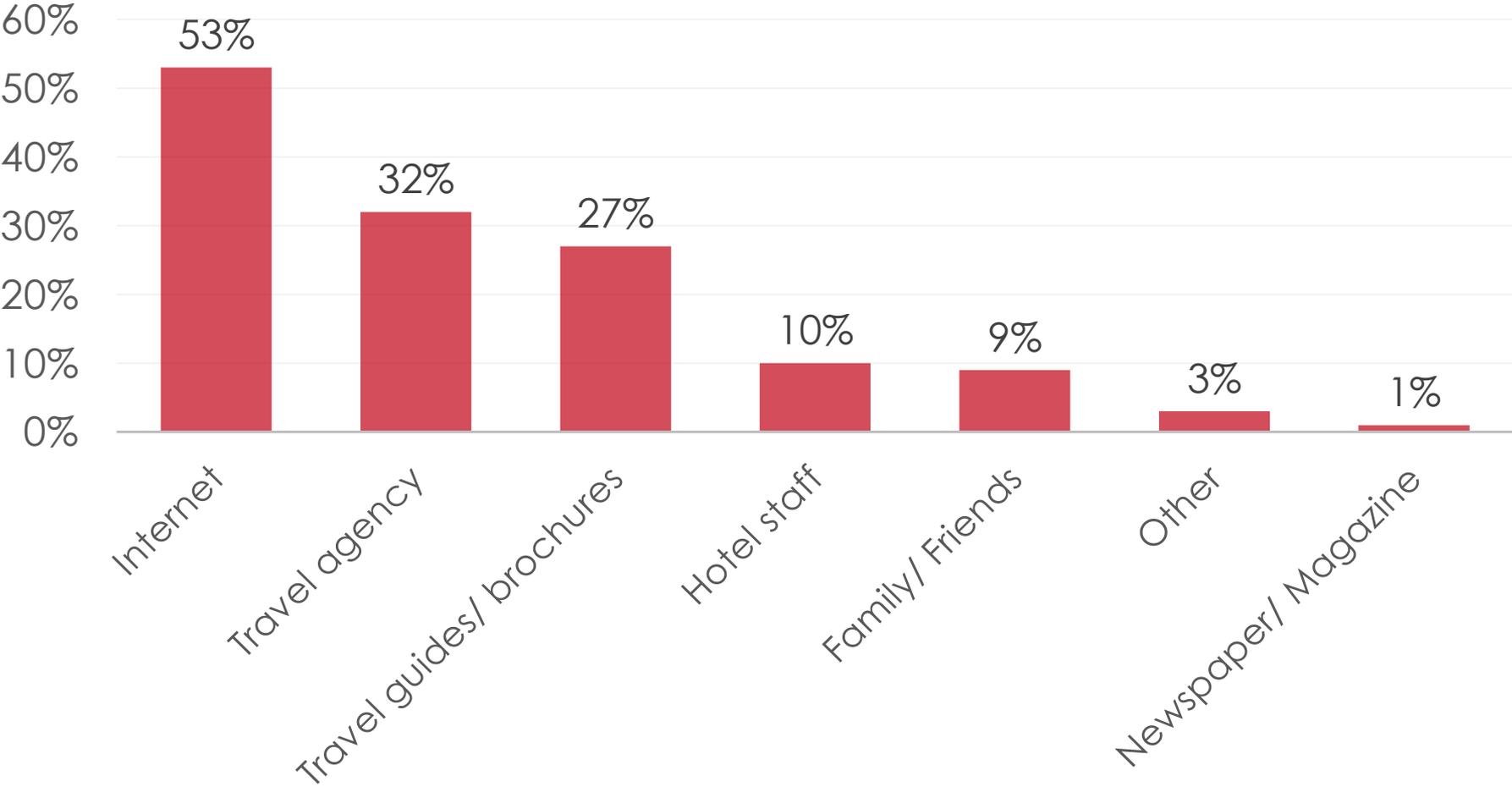
# SATISFACTION-CULTURAL ACTIVITY/EVENTS



Legend: Excellent (bar), MEAN (5pt Scale) (dot)

Oct-16: 4%, MEAN 2.85

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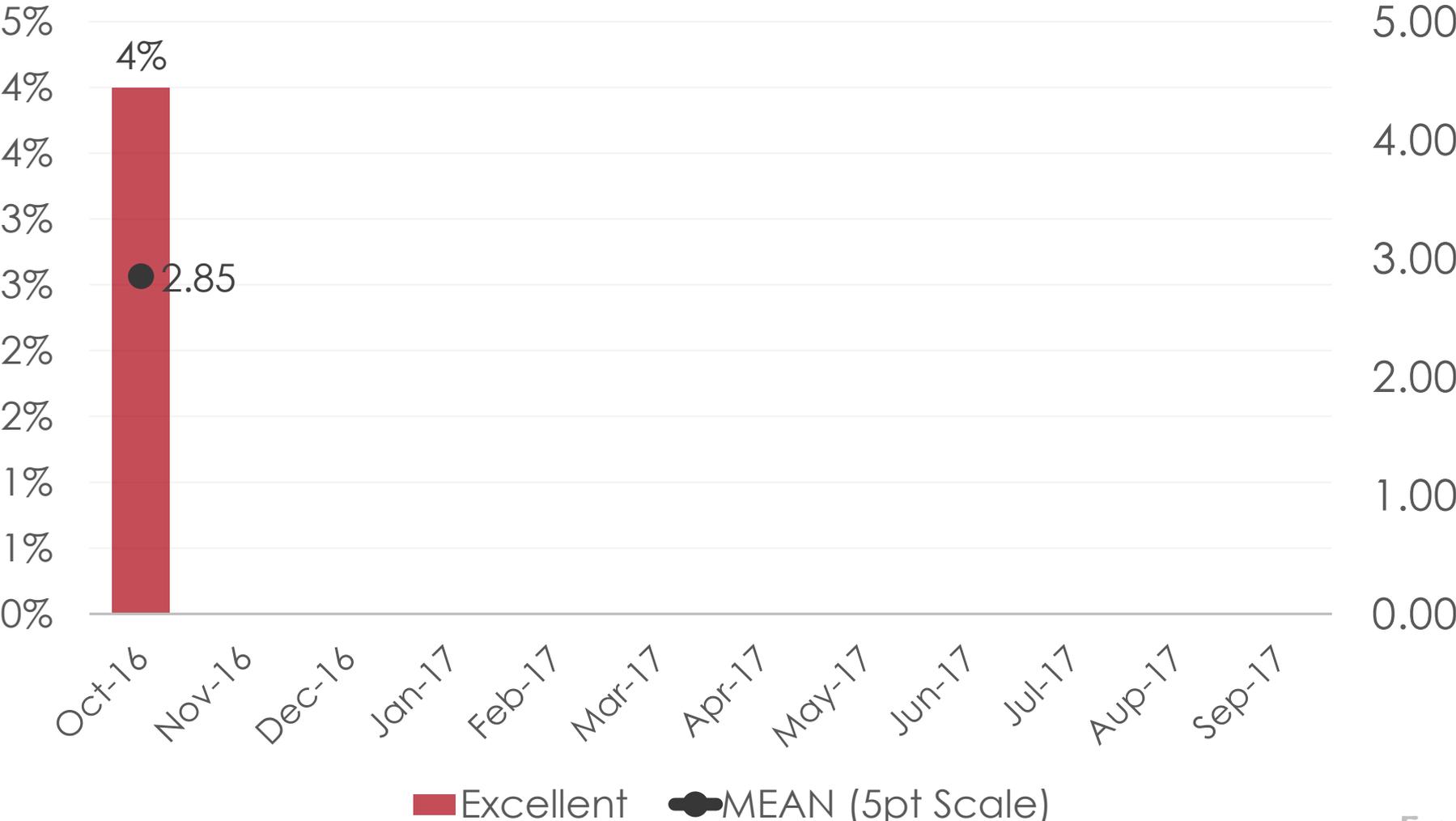
# OBSTACLES-
# CULTURAL ACTIVITY/EVENTS

[A]
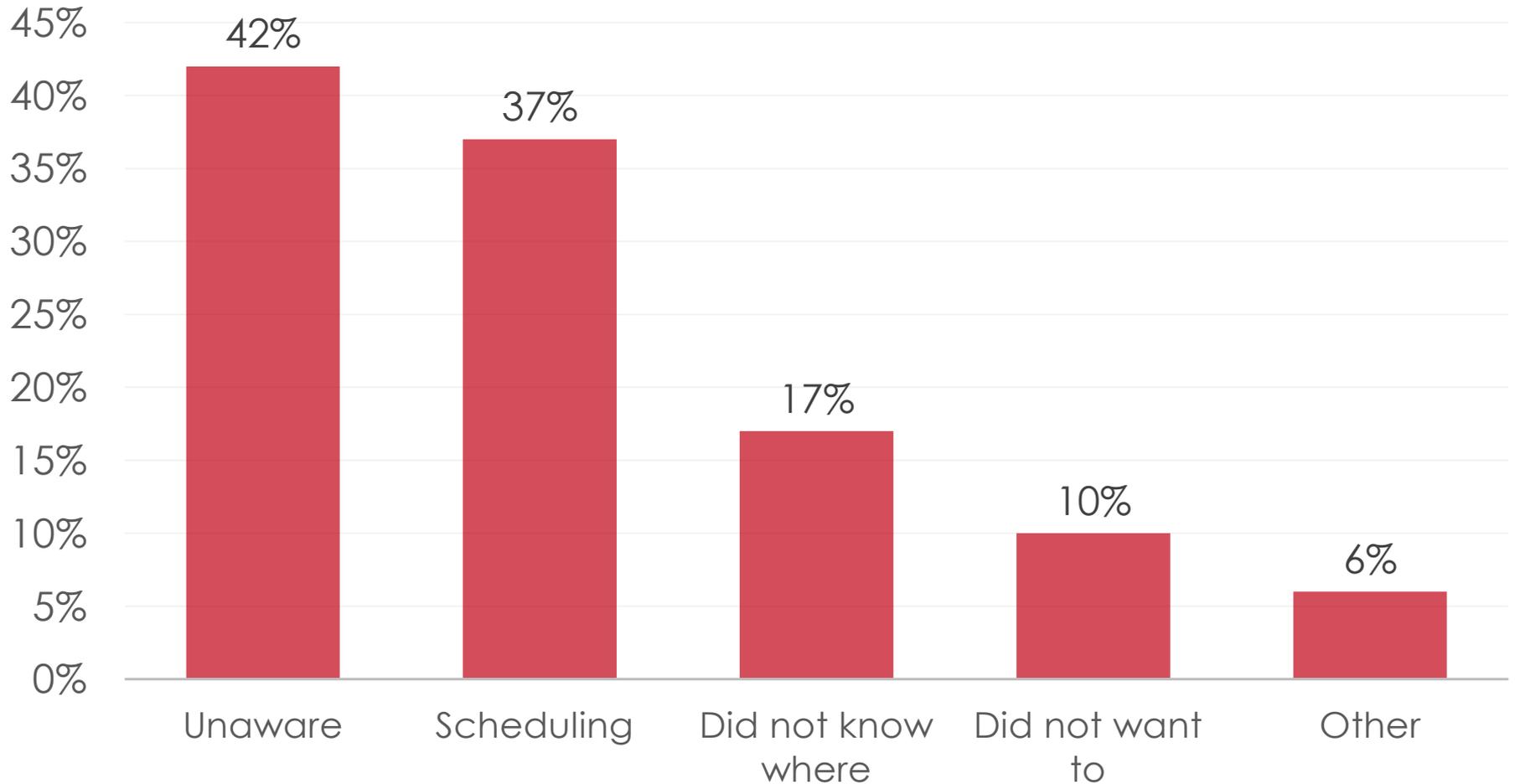
# ADVANCED STATISTICS

# 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.

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# Drivers- Overall Satisfaction

| Comparison of Drivers of Overall Satisfaction, 1st Quarter (Oct-Dec) 2016 | |
| --- | --- |
| | **1st Qtr. 2016** |
| Drivers: | **rank** |
| Quality & Cleanliness of beaches & parks | 3 |
| Ease of getting around | 7 |
| Safety walking around at night | |
| Quality of daytime tours | |
| Variety of daytime tours | |
| Quality of nighttime tours | |
| Variety of nighttime tours | |
| Quality of shopping | 5 |
| Variety of shopping | |
| Price of things on Guam | |
| Quality of hotel accommodations | 4 |
| Quality/cleanliness of air, sky | |
| Quality/cleanliness of parks | 8 |
| Quality of landscape in Tumon | 1 |
| Quality of landscape in Guam | 9 |
| Quality of ground handler | 6 |
| Quality/cleanliness of transportation vehicles | 2 |
| | |
| % of Overall Satisfaction Accounted For: | **56.4%** |
| NOTE: Only significant drivers are included. | |

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# Drivers of Overall Satisfaction

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by nine significant factors in the 1st Quarter FY2017 Period.  By rank order they are:
  - **Quality of landscape in Tumon,**
  - **Quality/cleanliness of transportation vehicles,**
  - **Quality & cleanliness of beaches & parks**
  - **Quality of hotel accommodations,**
  - **Quality of shopping,**
  - **Quality of ground handler,**
  - **Ease of getting around,**
  - **Quality/cleanliness of parks, and**
  - **Quality of landscape in Guam.**
- With all nine factors the overall $r^2$ is .564 meaning that **56.4% of overall satisfaction is accounted for by these factors.**

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# Drivers – On-Isle Expenditures

| Comparison of Drivers of Per Person On Isle Expenditure, 1st Quarter (Oct-Dec) 2016 | |
|---|---|
| | **1st Qtr. 2016** |
| Drivers: | rank |
| Quality & Cleanliness of beaches & parks | **3** |
| 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 | |
| Quality/cleanliness of parks | |
| Quality of landscape in Tumon | |
| Quality of landscape in Guam | |
| Quality of ground handler | **1** |
| Quality/cleanliness of transportation vehicles | |
| % of Per Person On Island Expenditures Accounted For | **2.9%** |
| NOTE: Only significant drivers are included. | |

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# Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Korean visitors on Guam is driven by three significant factors in the 1$^{st}$ Quarter FY2017 period. By rank order they are:
    - **Quality of ground handler,**
    - **Price of things on Guam, and**
    - **Quality & cleanliness of beaches & parks.**
- With these factors the overall r$^2$ is .029 meaning that **2.9% of per person on island expenditure is accounted for by these factors.**

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