*Guam Visitors Bureau*

# Korea Visitor Tracker Exit Profile & Market Segmentation Report

FY2019 - QTR.3 (APR-JUN 2019)

[ANTHOLOGY®] RESEARCH

GUAM VISITORS BUREAU

GUAM

# Background and Methodology

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

- A total of 1,086 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 1,086 is +/- 2.97 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 +/- 2.97 percentage points.

# Objectives

- To monitor the effectiveness of the Korea 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 Korea 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:
    - Families (Q11 Traveling w/ spouse/ child/ other family)
    - FIT (Q12/Q17- Not on group tour or prepaid package trip/ Q14 Direct booking air/ hotel)
    - Group Tour (Q12)
    - MICE (Q8 Convention/ Conference/ Trade Show/ Incentive Trip)
    - Honeymoon (Q8)
    - Wedding (Q8 Get married/ attend wedding)
    - Repeat Visitor (Q9)
    - Leisure traveler (Q8 Vacation/ relax/ beautiful beaches/ sightseeing)
  - To identify the most significant factors affecting overall visitor satisfaction.
  - To identify (for all visitors from Korea) the most important determinants of on-island spending.

# Key Highlighted Segments
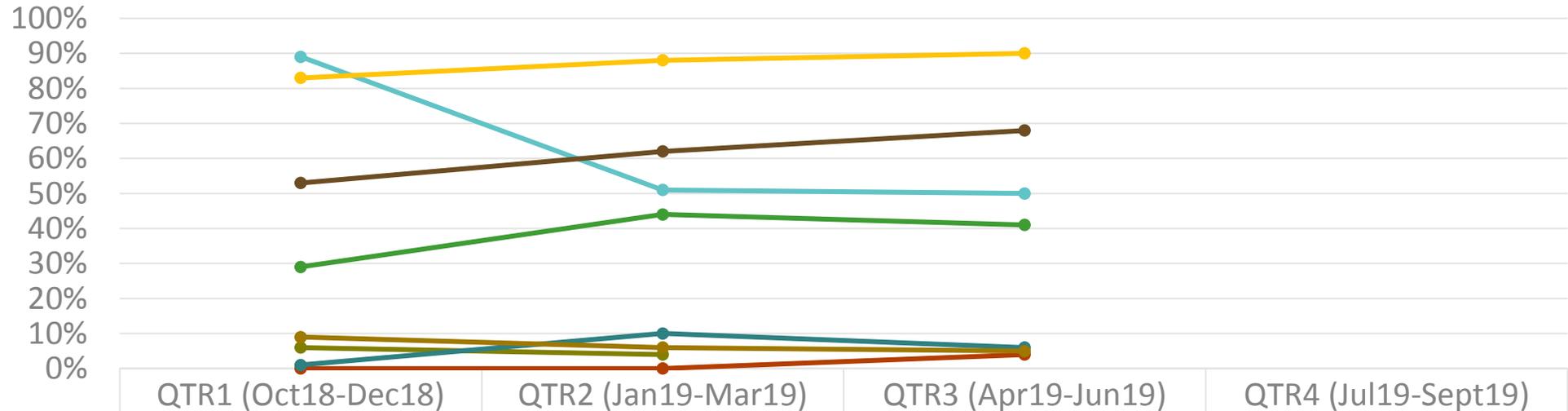


| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| Leisure Traveler | 89% | 51% | 50% | |
| Family | 83% | 88% | 90% | |
| Repeat | 29% | 44% | 41% | |
| FIT | 53% | 62% | 68% | |
| Honeymoon | 6% | 4% | | |
| MICE | 0% | 0% | 4% | |
| Wedding | 1% | 10% | 6% | |
| Group | 9% | 6% | 5% | |

SECTION 1
# PROFILE OF RESPONDENTS

# GENDER



Female 46%

Male 54%

# MARITAL STATUS



Single
24%

Married
76%
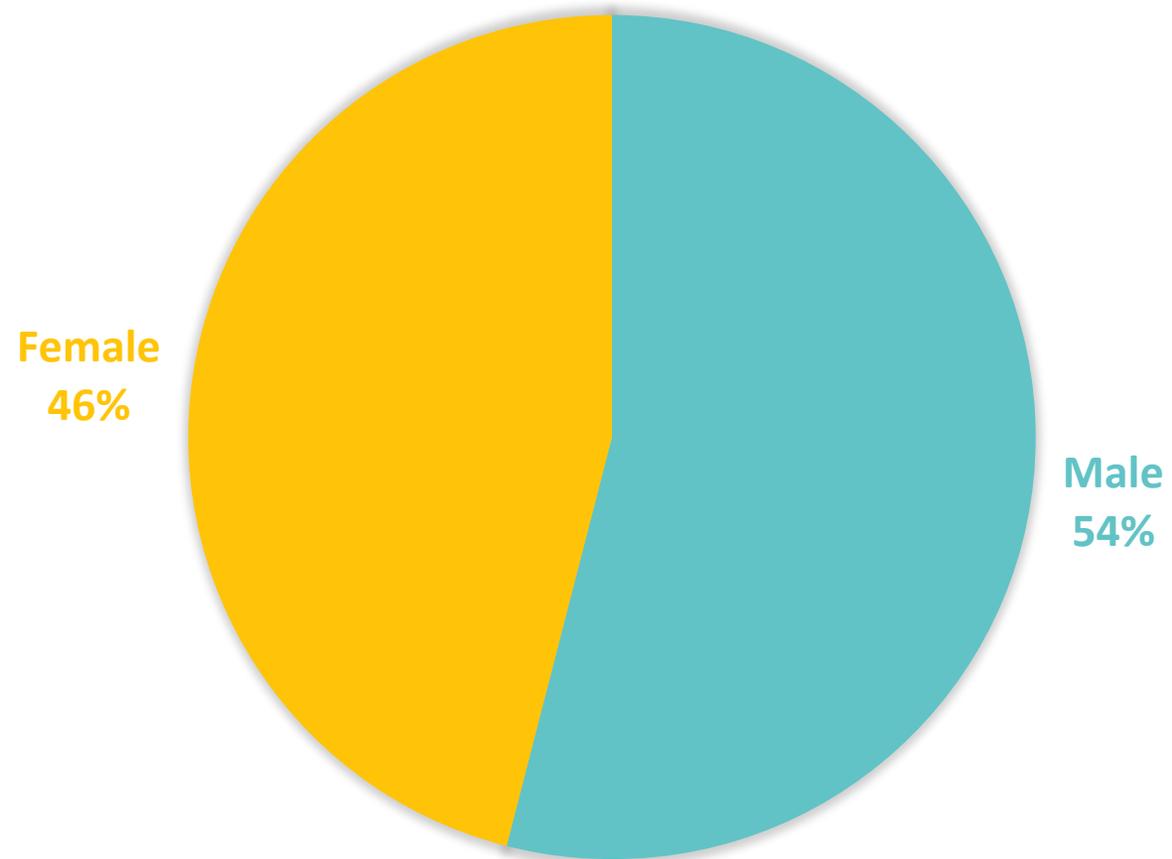
*Q: Are you married or single?*
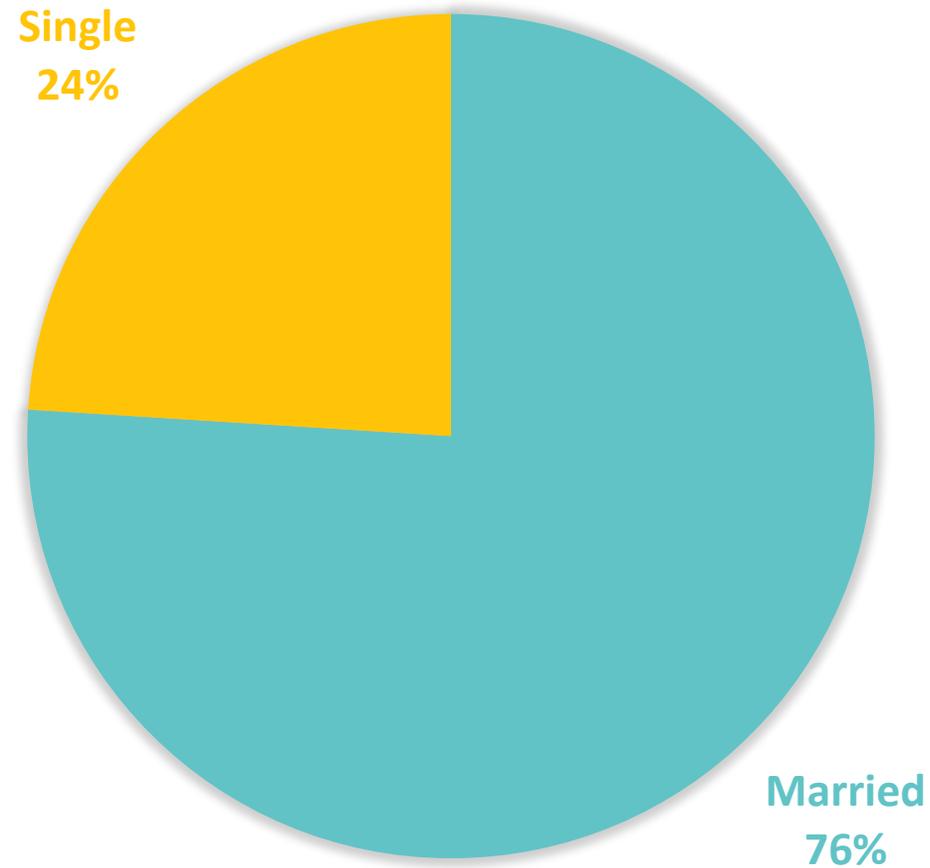
# MARITAL STATUS – TRACKING



Married: QTR1 (Oct18-Dec18) 78%, QTR2 (Jan19-Mar19) 79%, QTR3 (Apr19-Jun19) 76%, YTD 78%

Single: QTR1 (Oct18-Dec18) 22%, QTR2 (Jan19-Mar19) 21%, QTR3 (Apr19-Jun19) 24%, YTD 22%

*Q:  Are you married or single?*
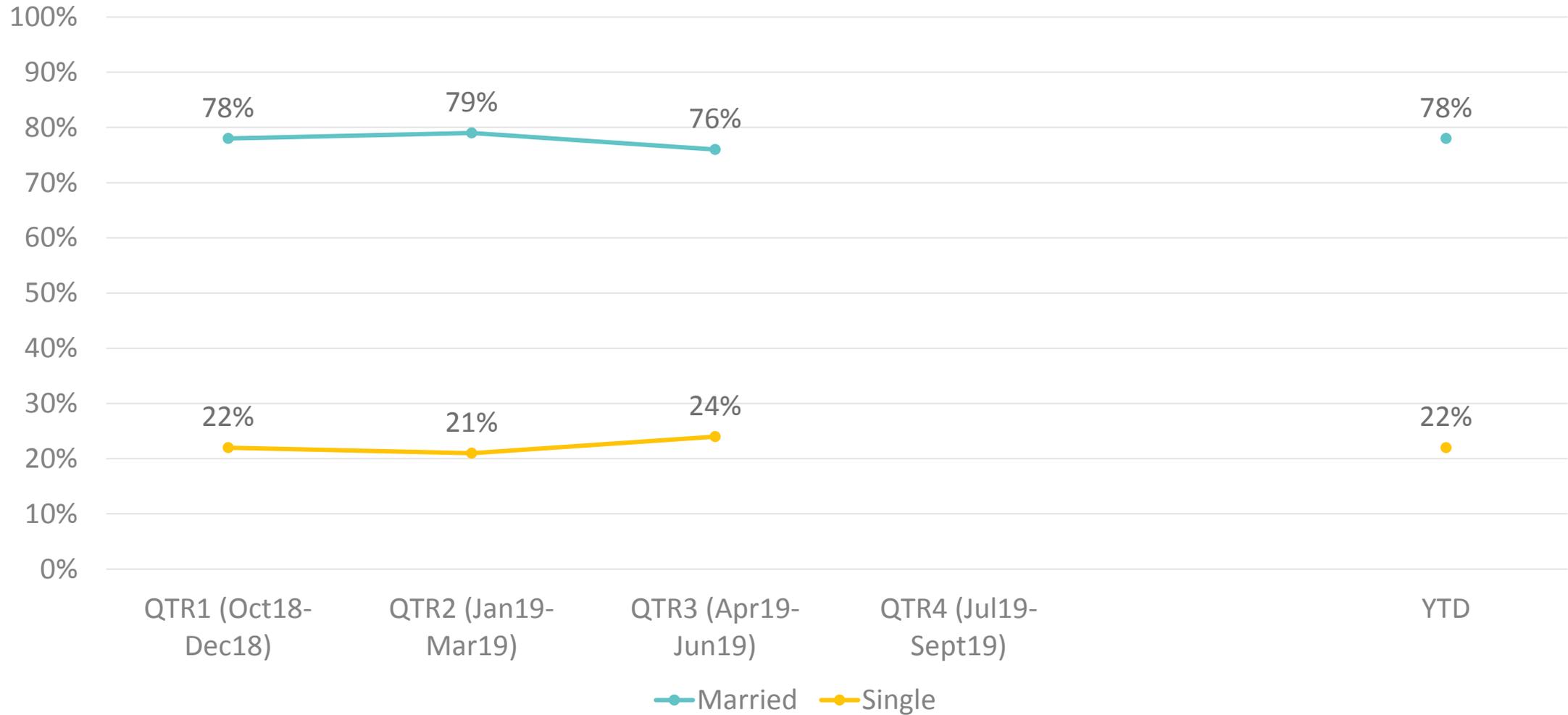
# MARITAL STATUS – SEGMENTATION

**GVB VISITOR SATISFACTION STUDY**
**QE  Are you married or single?**

| | | TOTAL | FAMILY | FIT | GROUP TOUR | MICE | HONEYMOON | WEDDING | REPEAT | LEISURE TRVL |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| QE | Married | 76% | 84% | 74% | 82% | 83% | 91% | 74% | 79% | 77% |
| | Single | 24% | 16% | 26% | 18% | 17% | 9% | 26% | 21% | 23% |
| | Total | 1086 | 972 | 739 | 49 | 6 | 46 | 68 | 448 | 540 |

*Prepared by Anthology Research*

*Q: Are you married or single?*

# AGE – TRACKING



| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) | | YTD |
|---|---|---|---|---|---|---|
| MEAN | 35.13 | 37.20 | 36.59 | | | 36.32 |
| MEDIAN | 35 | 39 | 39 | | | 38 |

*Q: And what was your age on your last birthday?*
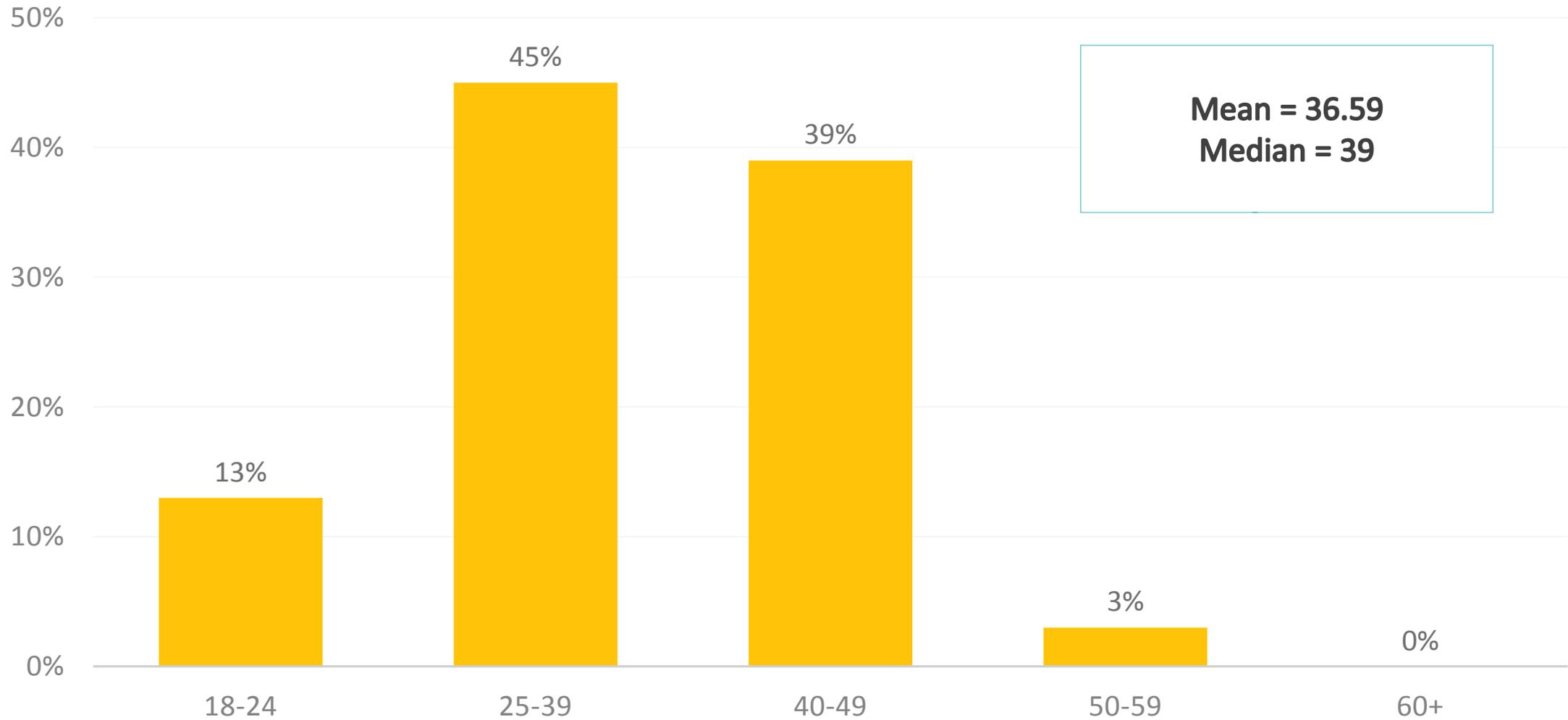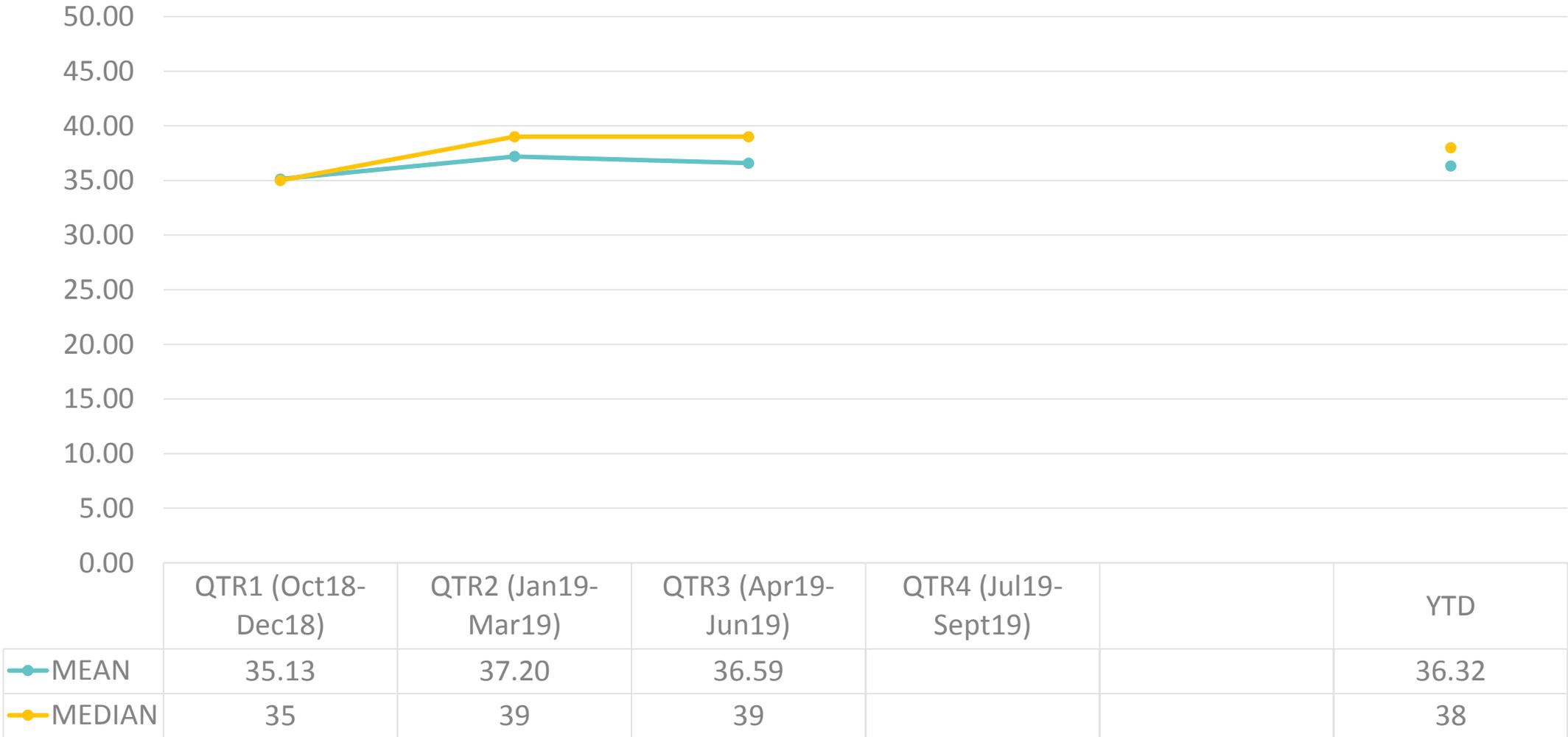
# AGE – SEGMENTATION

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

| | | TOTAL | FAMILY | FIT | GROUP TOUR | MICE | HONEYMOON | WEDDING | REPEAT | LEISURE TRVL |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| QF | 18-24 | 13% | 14% | 17% | 12% | | 13% | 29% | 19% | 3% |
| | 25-39 | 45% | 39% | 36% | 37% | 50% | 78% | 18% | 23% | 72% |
| | 40-49 | 39% | 44% | 45% | 35% | 50% | 7% | 49% | 56% | 20% |
| | 50-59 | 3% | 3% | 2% | 14% | | 2% | 4% | 2% | 4% |
| | 60+ | 0% | 0% | 0% | 2% | | | | 0% | 0% |
| | Total | 1086 | 972 | 739 | 49 | 6 | 46 | 68 | 448 | 540 |
| QF | Mean | 36.59 | 37.41 | 36.55 | 39.24 | 38.33 | 31.37 | 36.28 | 38.27 | 35.36 |
| | Median | 39 | 39 | 39 | 40 | 41 | 30 | 41 | 42 | 34 |

*Prepared by Anthology Research*

*Q: And what was your age on your last birthday?*

# HOUSEHOLD INCOME



Q : *What was your approximate annual household income, before taxes?*
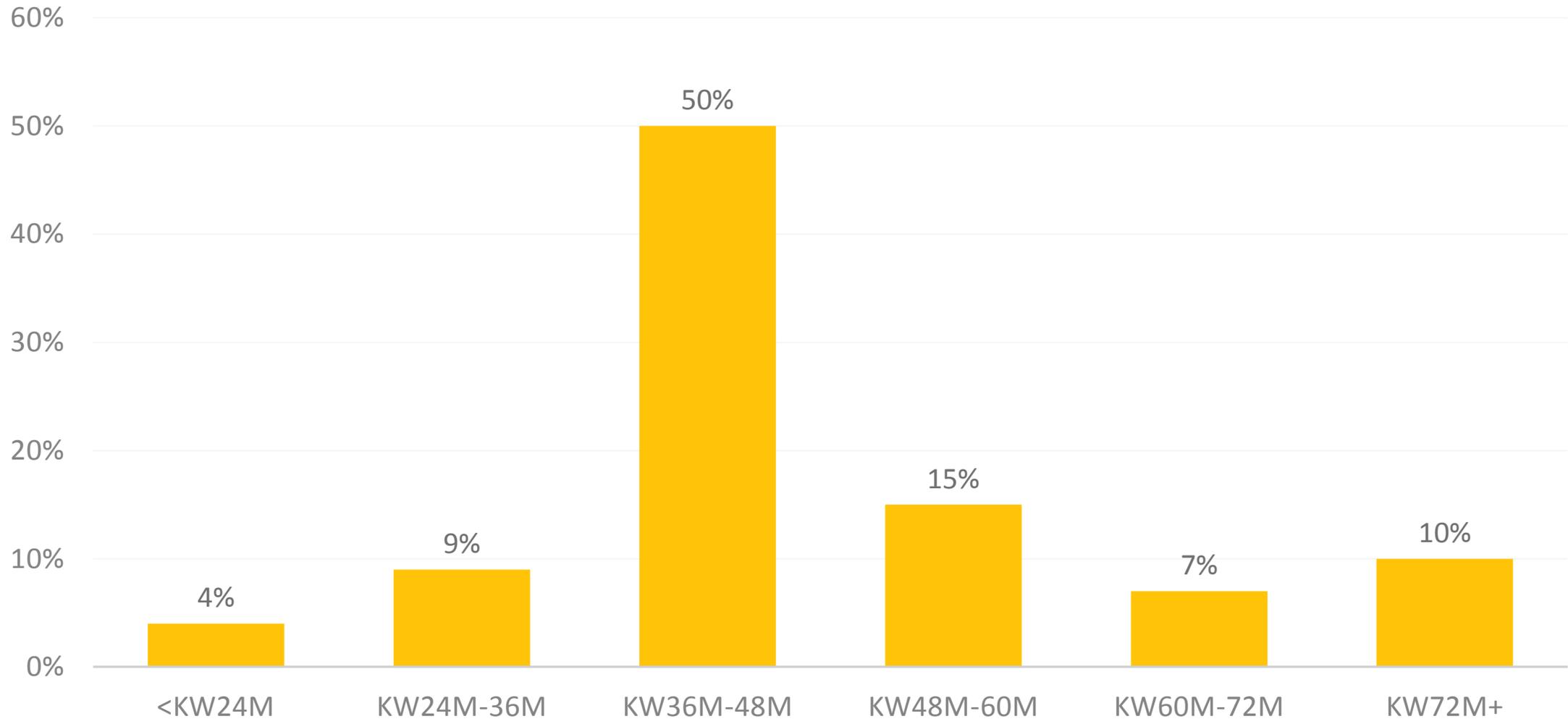
# HOUSEHOLD INCOME – SEGMENTATION

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

| | | TOTAL | FAMILY | FIT | GROUP TOUR | MICE | HONEYMOON | WEDDING | REPEAT | LEISURE TRVL |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| D2 | <KW12,000,000 | 1% | 1% | 1% | 2% | | 4% | 1% | 1% | 2% |
| | KW12,000,001-KW24,000,000 | 3% | 1% | 3% | 4% | | 2% | | 0% | 6% |
| | KW24,000,001-KW36,000,000 | 9% | 6% | 5% | 6% | 17% | 26% | 1% | 3% | 16% |
| | KW36,000,001-KW48,000,000 | 50% | 55% | 64% | 29% | 67% | 26% | 85% | 71% | 15% |
| | KW48,000,001-KW60,000,000 | 15% | 16% | 11% | 24% | 17% | 20% | 3% | 12% | 22% |
| | KW60,000,010KW72,000,000 | 7% | 8% | 5% | 10% | | 9% | 3% | 4% | 14% |
| | KW72,000,001+ | 10% | 11% | 7% | 22% | | 7% | 3% | 8% | 19% |
| | No Income/Rf | 4% | 2% | 4% | 2% | | 7% | 3% | 2% | 6% |
| | Total | 1086 | 972 | 739 | 49 | 6 | 46 | 68 | 448 | 540 |
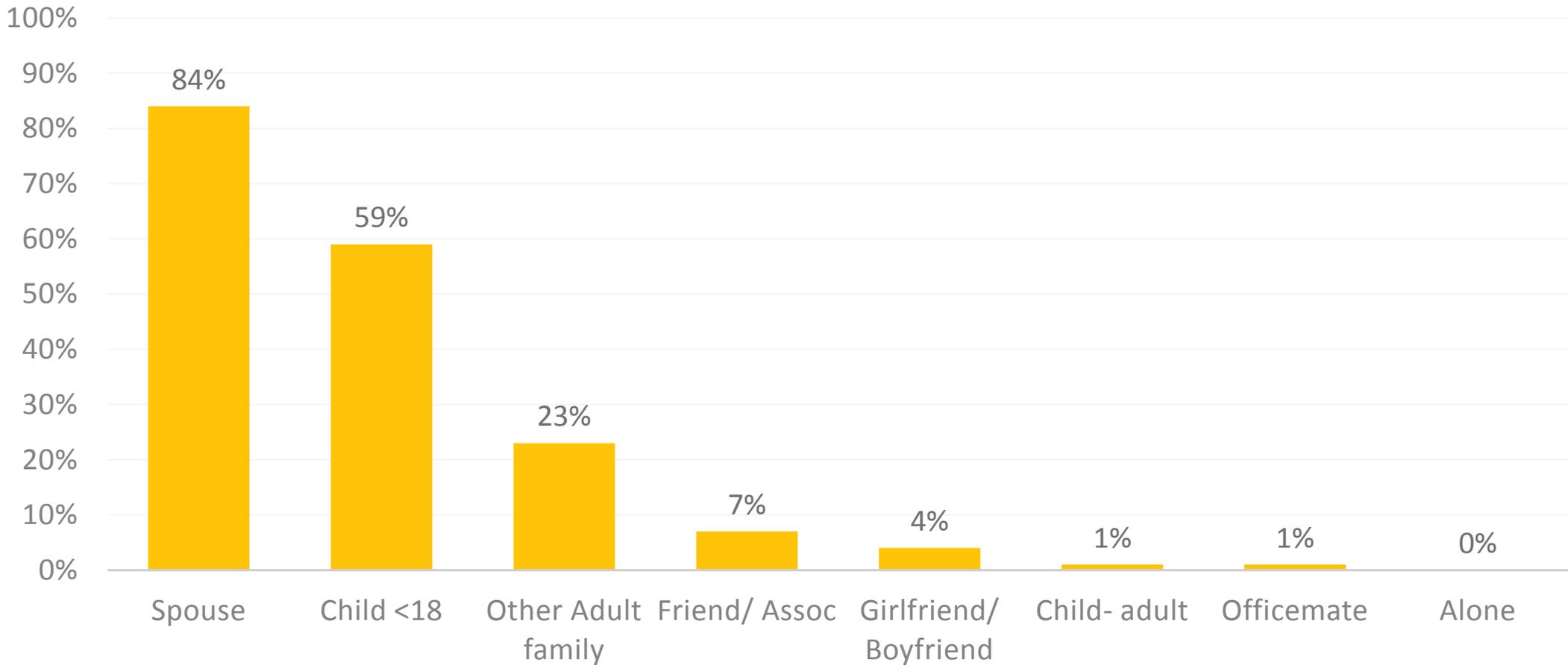
*Prepared by Anthology Research*

*Q: What was your approximate annual household income, before taxes?*

# TRAVEL PARTY



| Spouse | Child <18 | Other Adult family | Friend/ Assoc | Girlfriend/ Boyfriend | Child- adult | Officemate | Alone |
|--------|-----------|--------------------|--------------| ---------------------|--------------|-----------|-------|
| 84% | 59% | 23% | 7% | 4% | 1% | 1% | 0% |

*Q: In addition to yourself, on this trip, who else was in your travel party?*

# TRAVEL PARTY – TRACKING
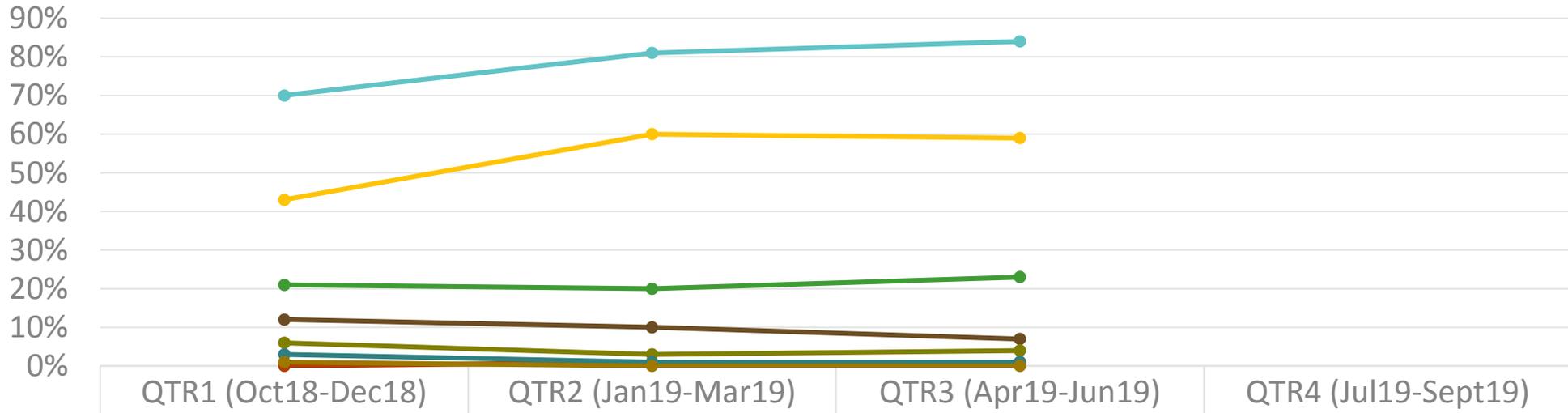


| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| Spouse | 70% | 81% | 84% | |
| Child<18 | 43% | 60% | 59% | |
| Adult family | 21% | 20% | 23% | |
| Friend/ Assoc | 12% | 10% | 7% | |
| GF/BF | 6% | 3% | 4% | |
| Officemate | 0% | 1% | 1% | |
| Child- adult | 3% | 1% | 1% | |
| Alone | 1% | 0% | 0% | |

*Q:  In addition to yourself, on this trip, who else was in your travel party?*

# TRAVEL PARTY – CHILD UNDER 18

**59% Traveling with a child**



Bar chart:
- 0-2 years old: 3%
- 3-6 years old: 48%
- 7-11 years old: 43%
- 12-18 years old: 5%

*Q : In addition to yourself, on this trip, who else was in your travel party?*

# TRAVEL PARTY SIZE

Alone, 1%

Two persons, 20%

Three or more, 79%

Mean = 4.35
Median = 4

*Q : Including yourself, how many people traveled with you in your immediate party?*
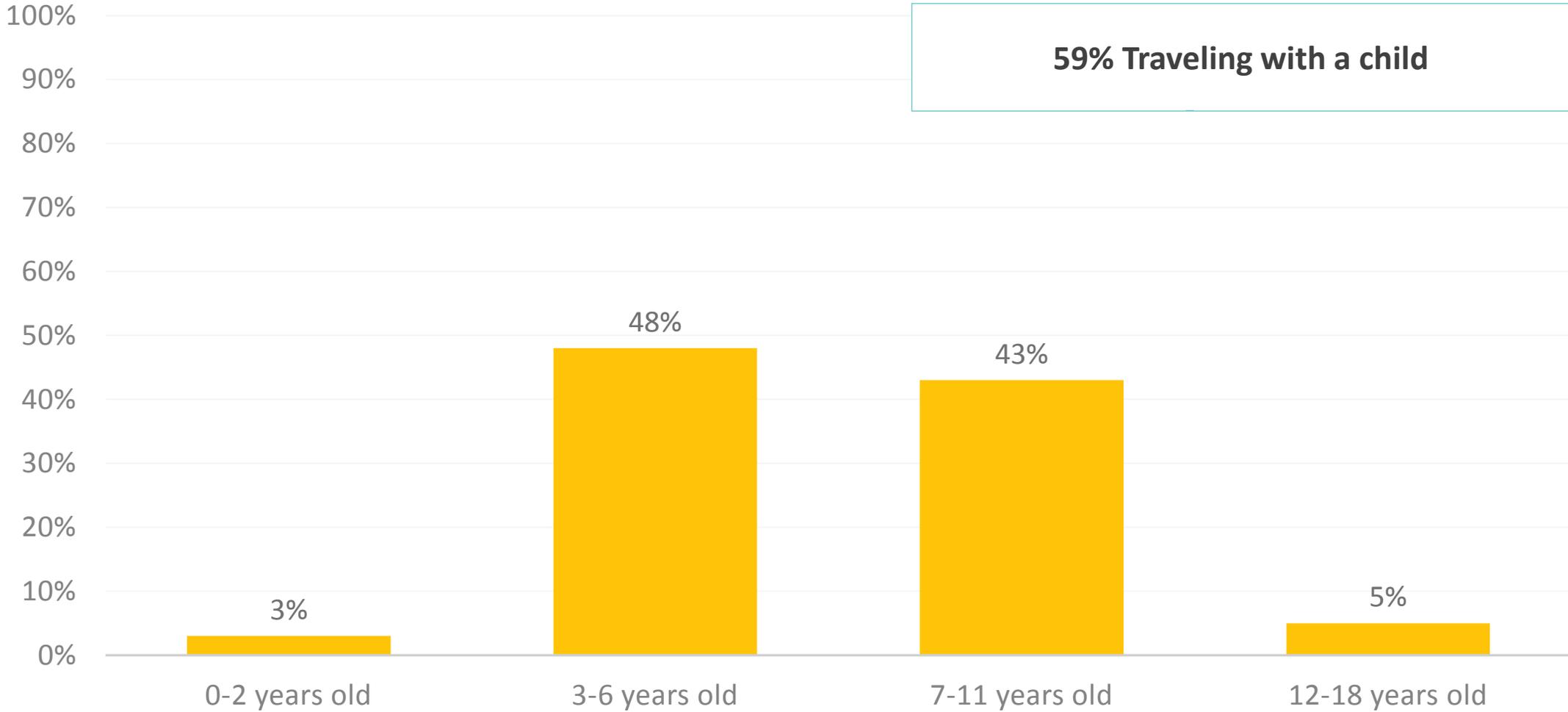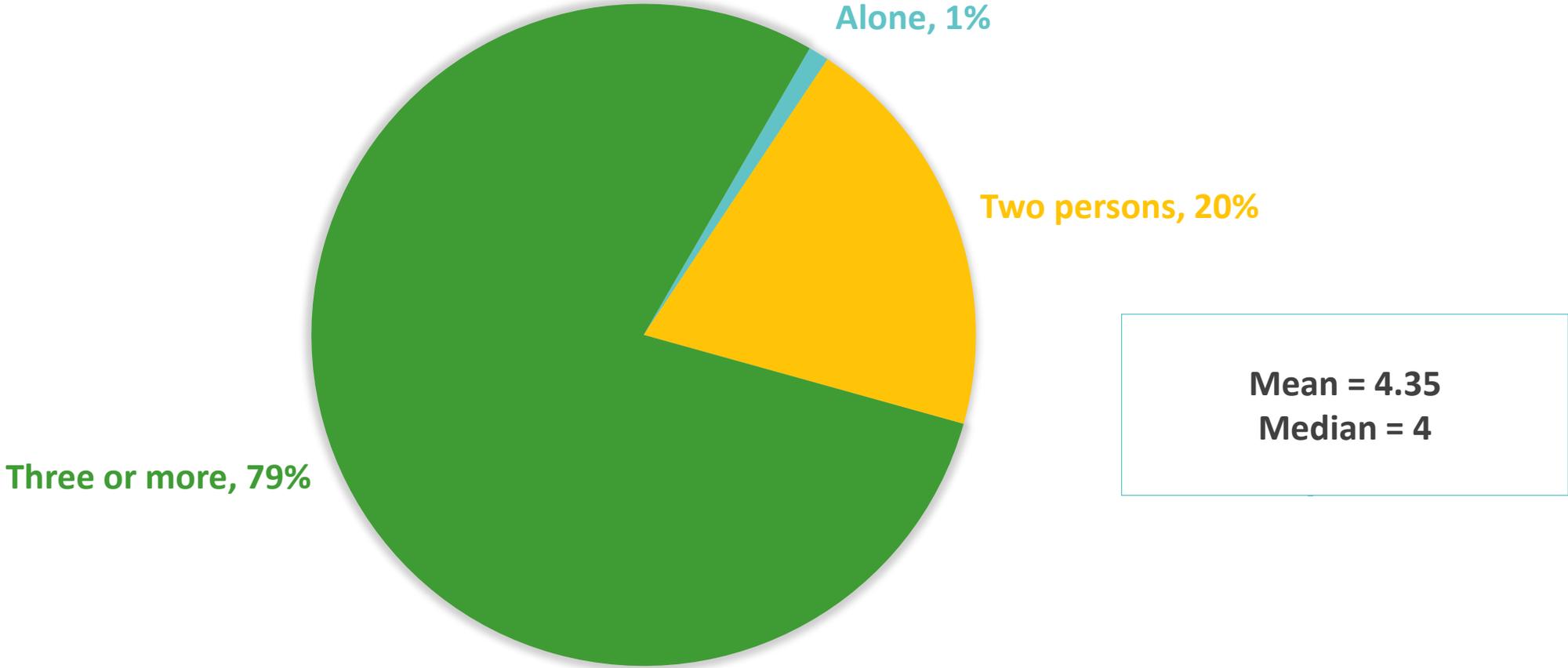
# TRAVEL PARTY SIZE – TRACKING

| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | | 4.88 | 4.35 | |
| MEDIAN | | 4 | 4 | |

20

*Q : Including yourself, how many people traveled with you in your immediate party?*
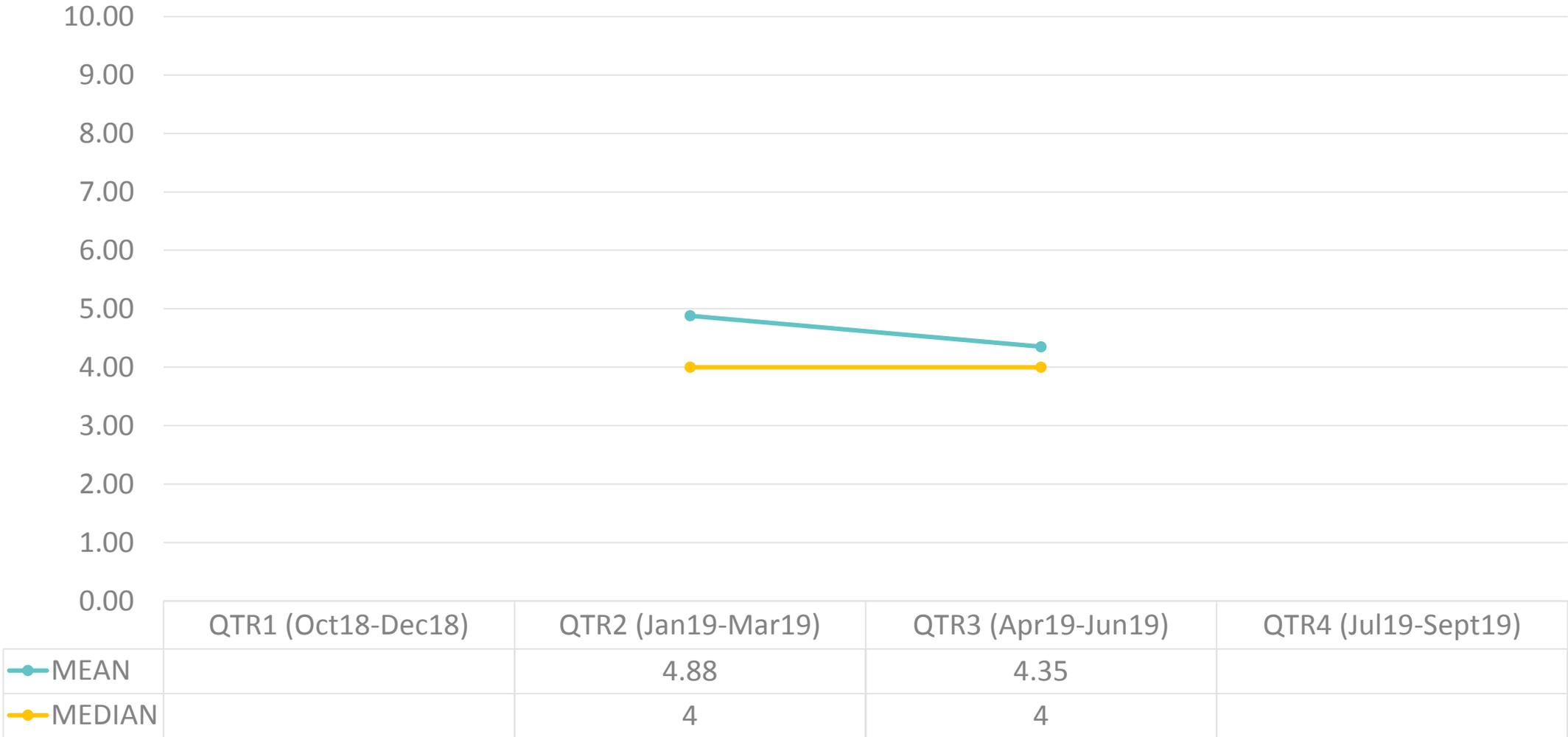
# TRIPS TO GUAM

Mean = 1.50
Median = 1



Repeat
41%

1st Time
59%

*Q : Including this trip, how many times have you visited Guam?*

# TRIPS TO GUAM – TRACKING



Chart showing First and Repeat visitor percentages:

| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) | YTD |
|---|---|---|---|---|---|
| First | 71% | 56% | 59% | | 62% |
| Repeat | 29% | 44% | 41% | | 38% |

—First —Repeat

*Q: Including this trip, how many times have you visited Guam?*

22
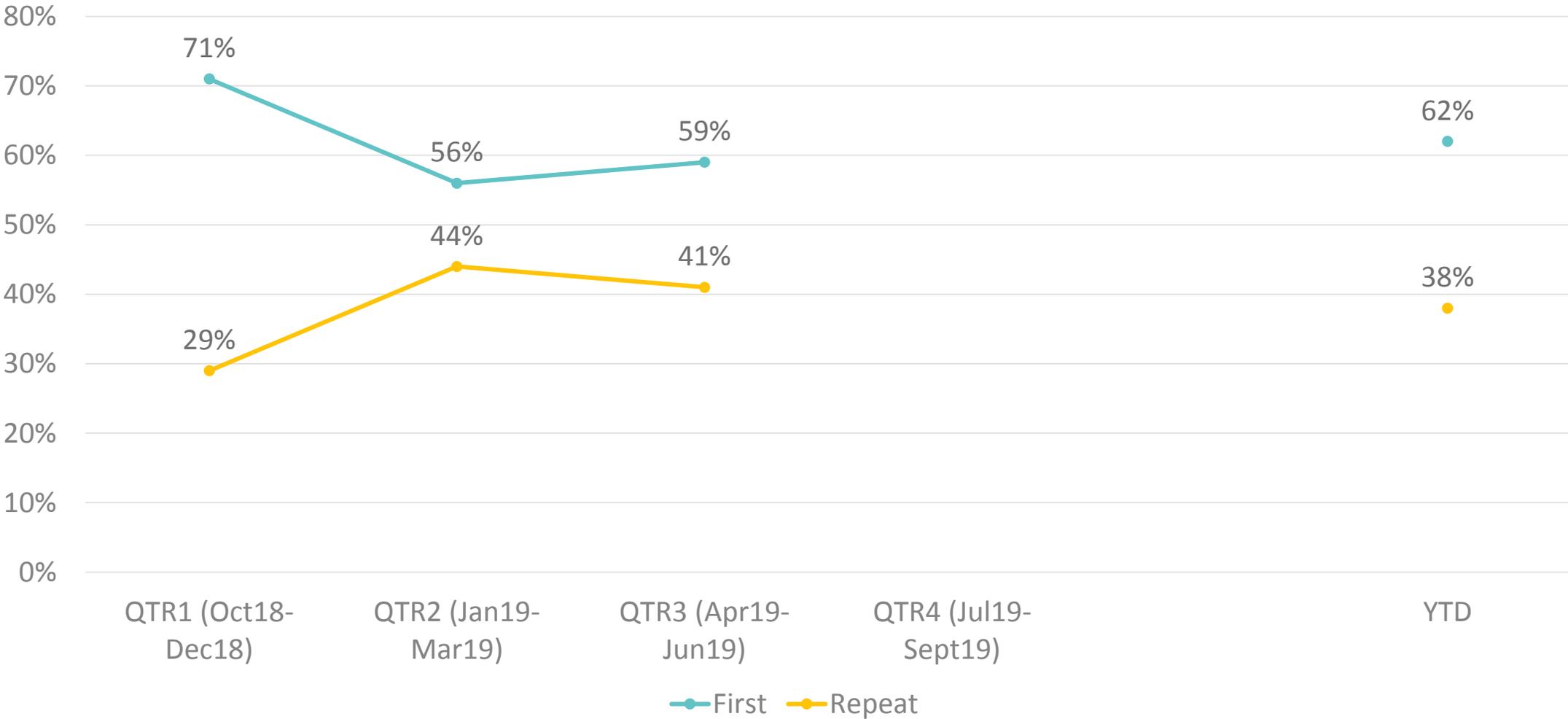
**GVB VISITOR SATISFACTION STUDY**
**Q9  Including this trip, how many times have you been to Guam?**

| | | TOTAL | FAMILY | FIT | GROUP TOUR | MICE | HONEYMOON | WEDDING | REPEAT | LEISURE TRVL |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| Q9 | 1st time | 59% | 54% | 46% | 76% | 67% | 89% | 56% | | 82% |
| | Repeat | 41% | 46% | 54% | 24% | 33% | 11% | 44% | 100% | 18% |
| | Total | 1086 | 972 | 739 | 49 | 6 | 46 | 68 | 448 | 540 |
| Q9 | Mean | 1.50 | 1.55 | 1.63 | 1.49 | 1.33 | 1.13 | 1.47 | 2.21 | 1.33 |
| | Median | 1 | 1 | 2 | 1 | 1 | 1 | 1 | 2 | 1 |

*Prepared by Anthology Research*

*Q: Including this trip, how many times have you visited Guam?*

# LENGTH OF STAY

**Mean number of nights = 4.99**
**Median number of nights = 4**



*Q: How many nights did you stay on Guam?*
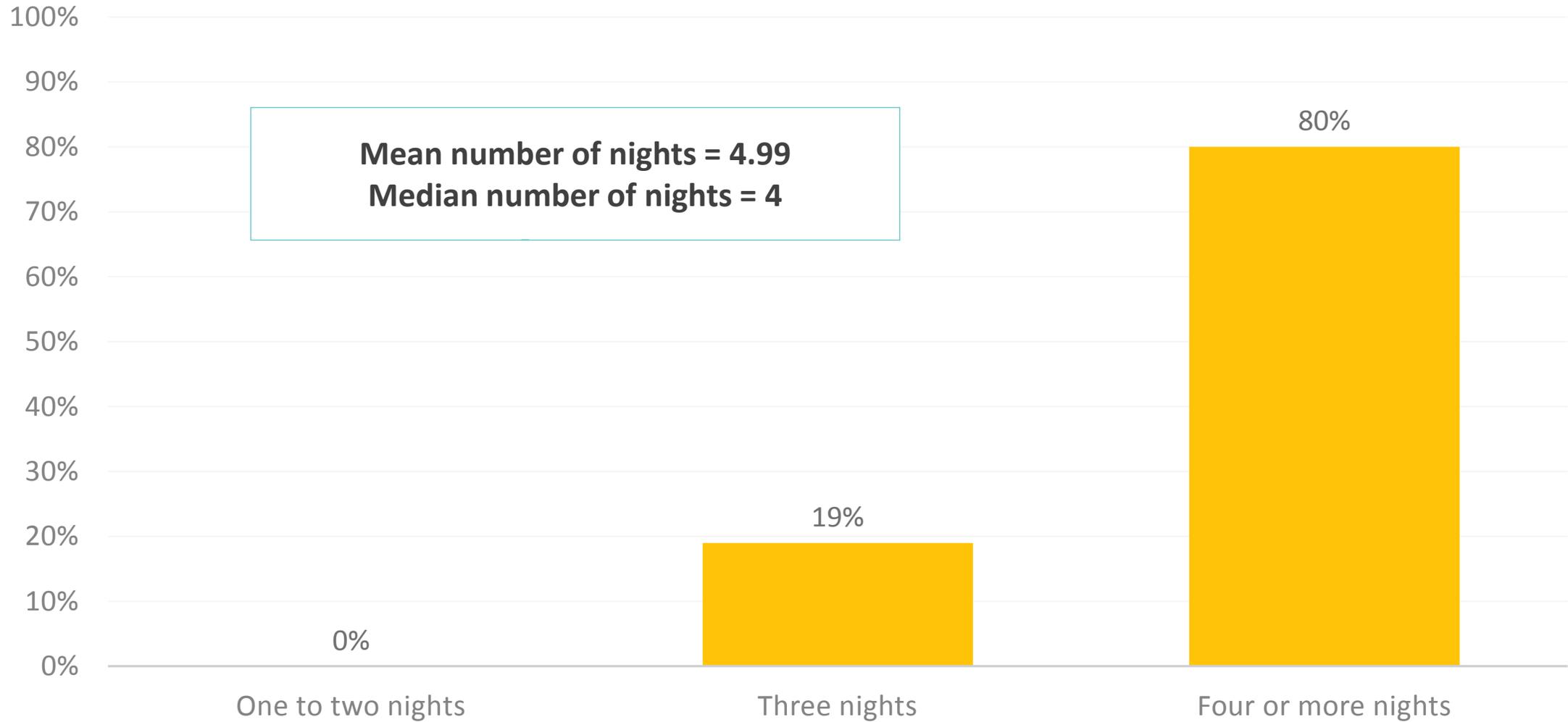
# LENGTH OF STAY – TRACKING



| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) | | YTD |
|---|---|---|---|---|---|---|
| MEAN | 4.13 | 5.04 | 4.99 | | | 4.73 |
| MEDIAN | 4 | 4 | 4 | | | 4 |

*Q: How many nights did you stay on Guam?*

25

# LENGTH OF STAY – SEGMENTATION

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

| | | TOTAL | FAMILY | FIT | GROUP TOUR | MICE | HONEYMOON | WEDDING | REPEAT | LEISURE TRVL |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| SA | 1-2 nights | 0% | 0% | 0% | | | | | | 1% |
| | 3 nights | 19% | 16% | 11% | 47% | 33% | 9% | 1% | 8% | 37% |
| | 4+ | 80% | 84% | 88% | 53% | 67% | 91% | 99% | 92% | 63% |
| | Total | 1086 | 972 | 739 | 49 | 6 | 46 | 68 | 448 | 540 |
| SA | Mean | 4.99 | 5.15 | 5.46 | 4.16 | 5.33 | 4.59 | 5.79 | 5.73 | 3.93 |
| | Median | 4 | 5 | 6 | 4 | 6 | 4 | 6 | 6 | 4 |

*Prepared by Anthology Research*

*Q:  How many nights did you stay on Guam?*

# OCCUPATION – Top Responses (10%+)



Bar chart showing occupation top responses: Self-employed 39%, Company: Non-Mgr 16%

*Q: What is your occupation?*
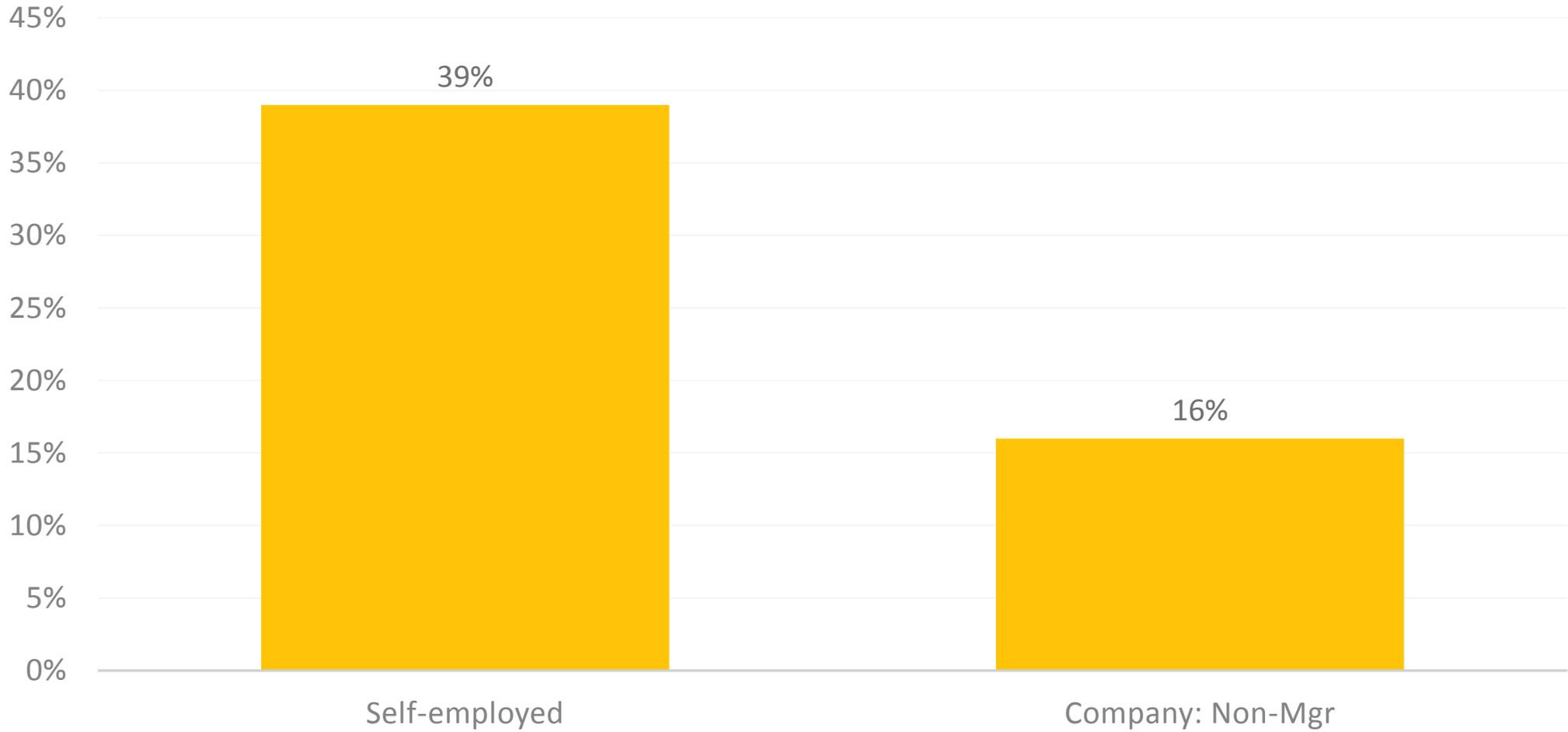
SECTION 2
# TRAVEL PLANNING

# ORGANIZED TOUR GROUP

**Organized tour group**
**5%**

**No**
**95%**

*Q: On this trip, I am a member of an organized tour group?*
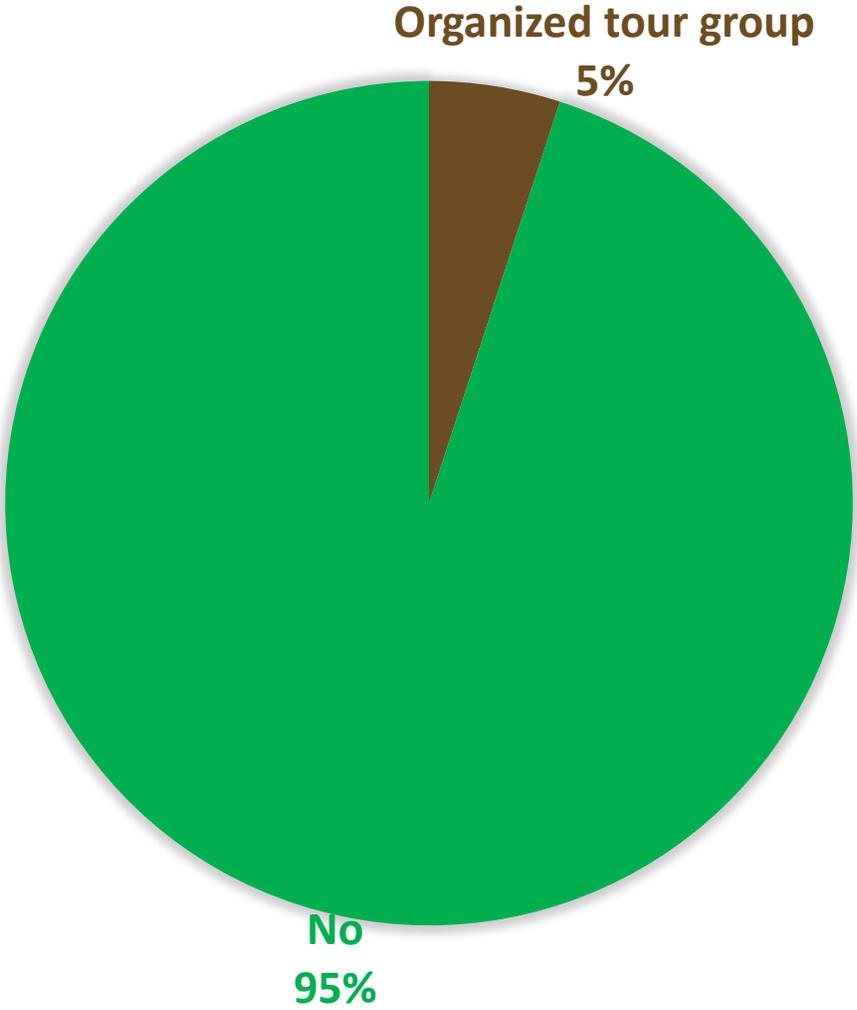
# ORGANIZED TOUR GROUP – TRACKING



|  | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) | | YTD |
|---|---|---|---|---|---|---|
| Group Tour | 9% | 6% | 5% | | | 7% |

*Q: On this trip, I am a member of an organized tour group?*

# ONLINE BOOKING



No, 12%

Made Arrangements
Online, 88%

*Q: Did you book any of your travel arrangements online?*
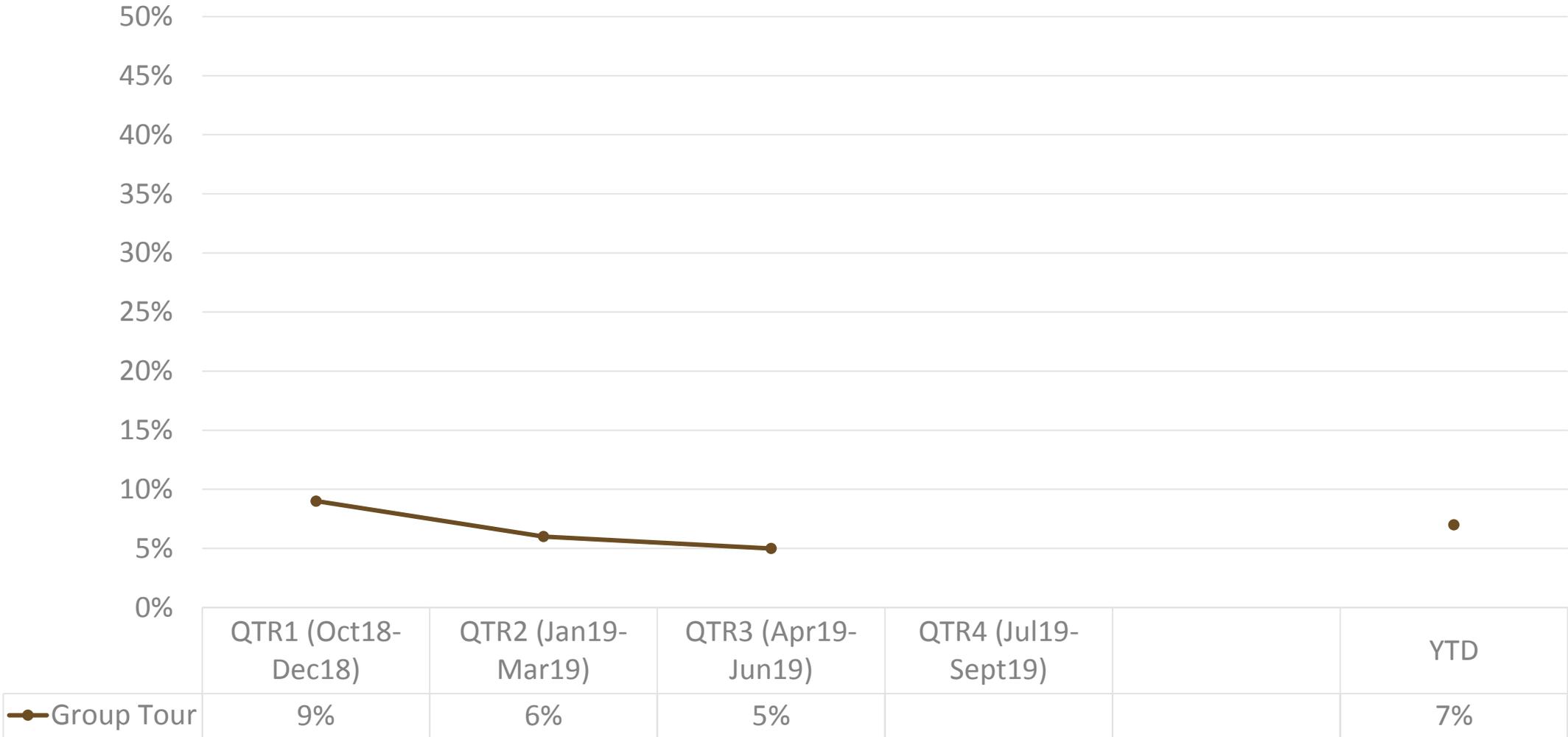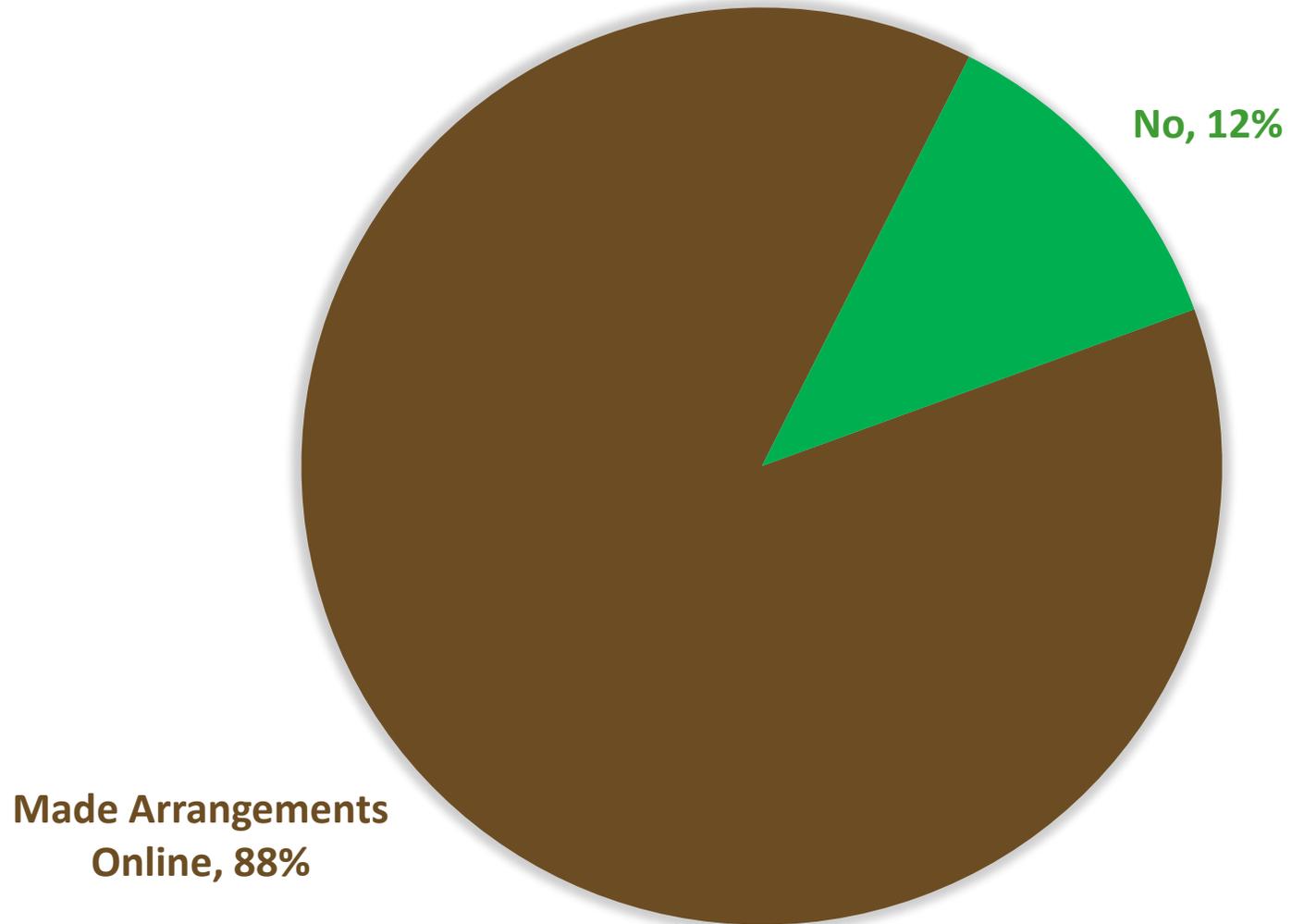
# ONLINE BOOKING – TRACKING



| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| Online Booking | | 88% | 88% | |

*Q: Did you book any of your travel arrangements online?*

# TRAVEL ARRANGEMENTS

*Q: How did you book your travel arrangements to Guam?*
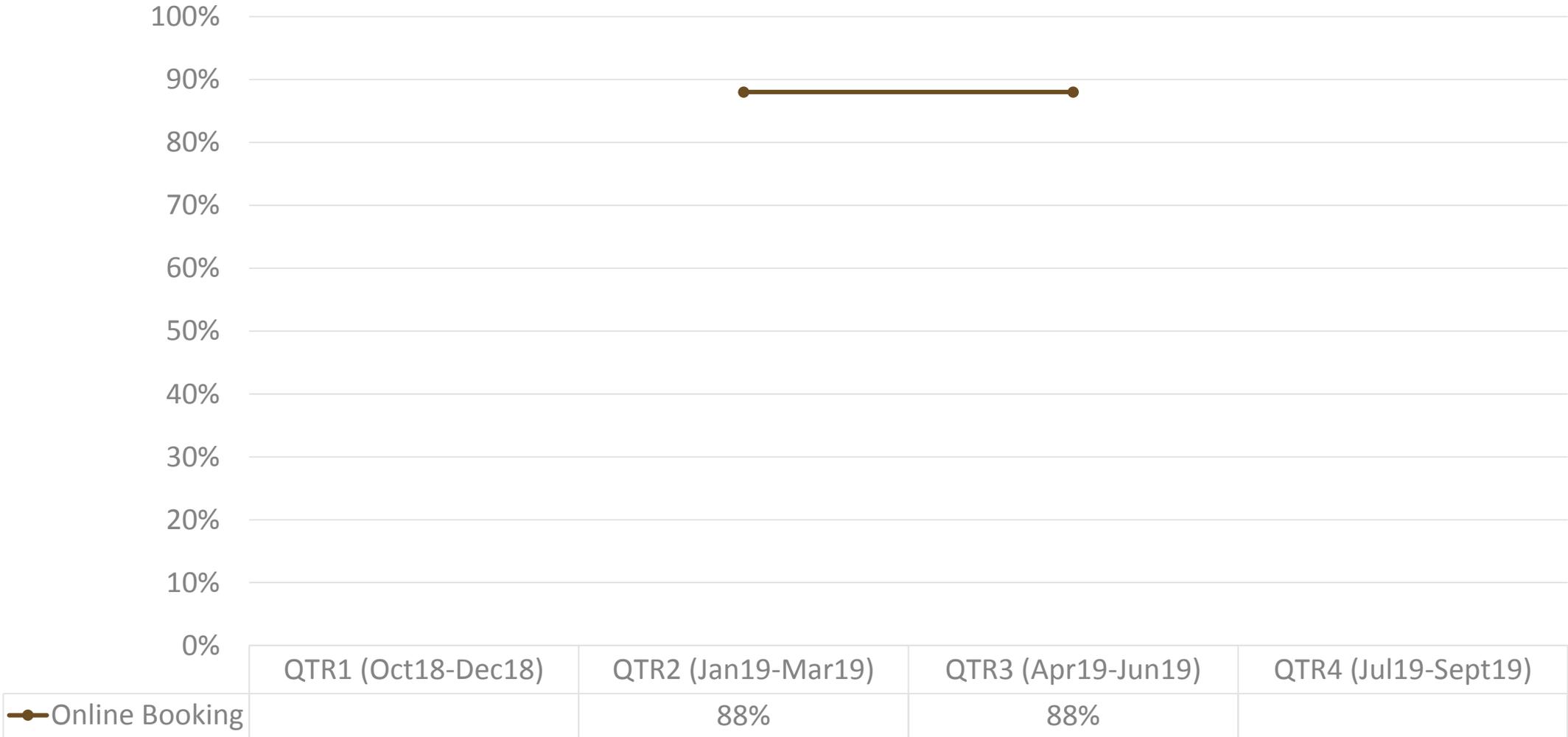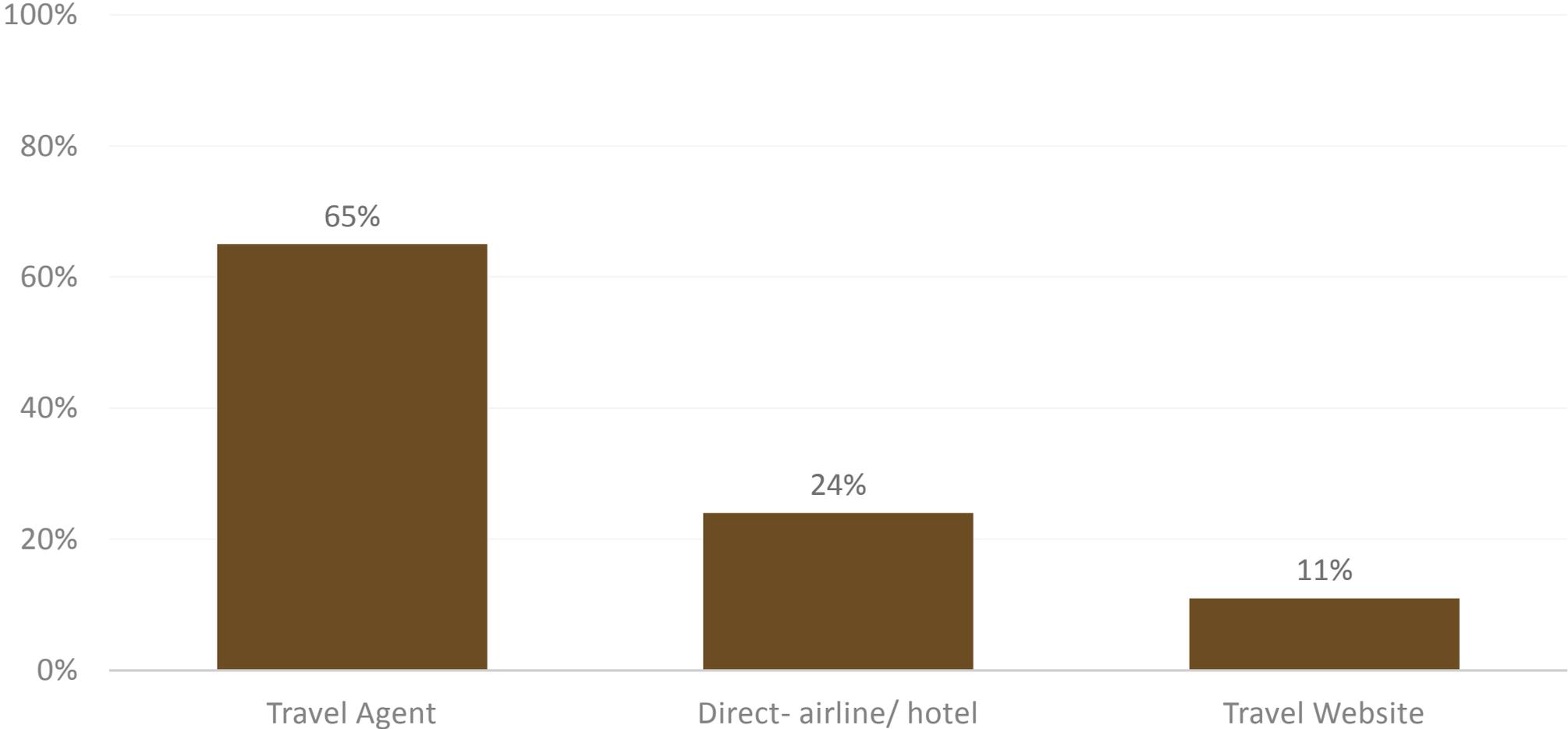
# TRAVEL ARRANGEMENTS – TRACKING
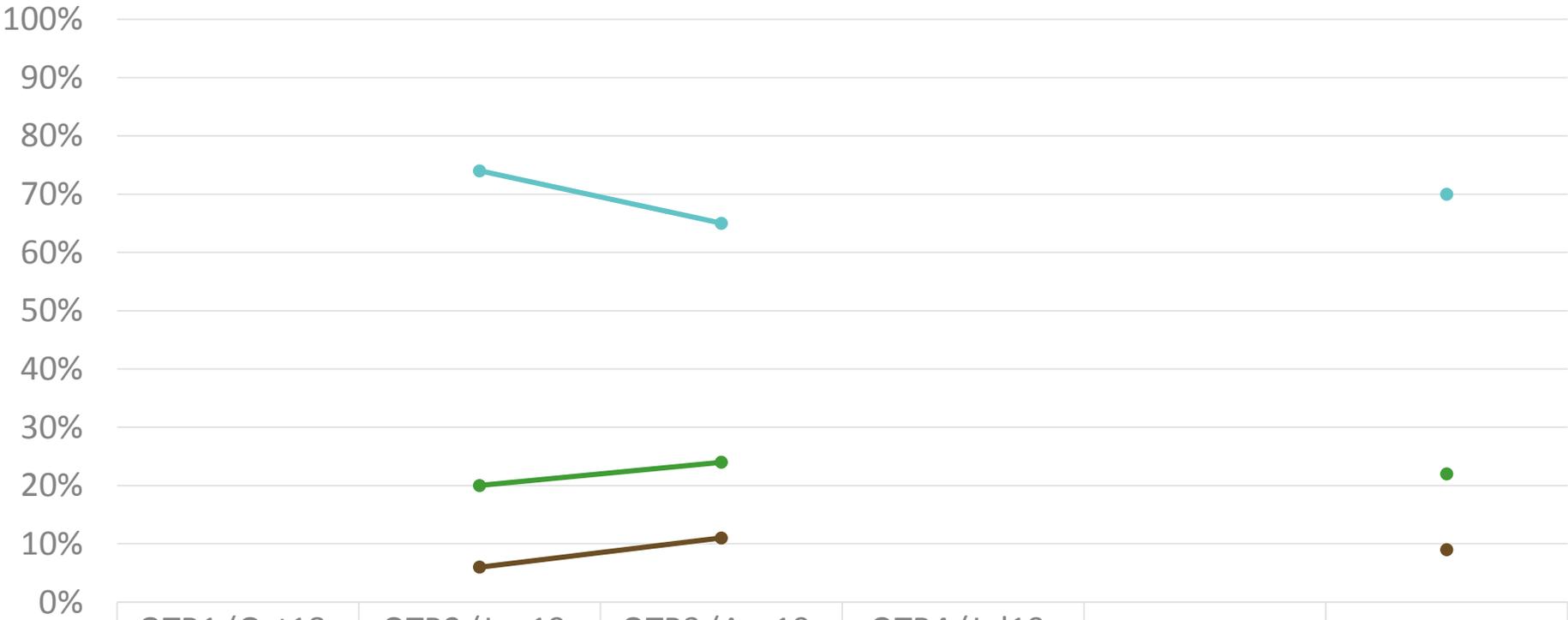


| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) | | YTD |
|---|---|---|---|---|---|---|
| Travel Agent | | 74% | 65% | | | 70% |
| Travel Website | | 6% | 11% | | | 9% |
| Direct- Airline/ Hotel | | 20% | 24% | | | 22% |

*Q: How did you book your travel arrangements to Guam?*

# PREPAID PACKAGE TRIP



Prepaid Package Trip
32%

No
68%

Q: Are you on a prepaid package trip that includes at least airfare and hotel?

# PREPAID PACKAGE TRIP



| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) | | YTD |
|---|---|---|---|---|---|---|
| Prepaid Pkg | 57% | 38% | 32% | | | 42% |

*Q: Are you on a prepaid package trip that includes at least airfare and hotel?*

# ACCOMMODATIONS (5%+)



*Q: Where did you stay while on Guam?*

# TRAVEL MOTIVATIONS (10%+)



Bar chart showing travel motivations:
- Prior Trip-Positive: 39%
- Scuba: 39%
- Vacation: 30%
- Water sport: 30%
- Visit someone: 30%
- Relax: 22%
- Sightseeing: 16%
- Natural beauty: 13%
- Shopping: 12%
- Price: 10%

*Q: What top three reasons motivated you to travel to Guam on this trip?*

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

| | | TOTAL | FAMILY | FIT | GROUP TOUR | MICE | HONEYMOON | WEDDING | REPEAT | LEISURE TRVL |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| Q8 | A previous visit | 39% | 44% | 52% | 24% | 33% | 9% | 40% | 95% | 15% |
| | Scuba diving | 39% | 42% | 54% | 16% | 17% | 4% | 40% | 58% | 4% |
| | Vacation | 30% | 27% | 23% | 47% | 33% | 41% | 6% | 13% | 61% |
| | Water sports (snorkeling, windsurfing, parasailing) | 30% | 27% | 32% | 16% | | 15% | 13% | 21% | 24% |
| | To visit friends or relatives | 30% | 33% | 41% | 14% | 33% | 4% | 37% | 50% | 2% |
| | Just to relax | 22% | 23% | 13% | 29% | | 24% | 1% | 11% | 45% |
| | Sightseeing/ visiting tourist spots | 16% | 13% | 6% | 24% | | 9% | | 2% | 31% |
| | Beautiful seas, beaches, tropical climate | 13% | 12% | 7% | 10% | | 13% | | 3% | 27% |
| | Shopping | 12% | 11% | 9% | 18% | 17% | 17% | | 6% | 22% |
| | Price of the tour package | 10% | 10% | 12% | 8% | | 4% | 37% | 9% | 5% |
| | Short travel time (not too far from home) | 8% | 8% | 7% | 14% | | 13% | 1% | 4% | 14% |
| | Career certification/ testing | 8% | 9% | 12% | 8% | 17% | 2% | 10% | 8% | 0% |
| | Recommendation of friend/ relative/ travel agency | 8% | 9% | 4% | 10% | | 2% | 1% | 4% | 12% |
| | To Get Married/ attend Wedding | 6% | 7% | 9% | 6% | | 15% | 100% | 7% | 1% |
| | Honeymoon | 4% | 5% | 2% | 8% | | 100% | 10% | 1% | 6% |
| | Social Media networks | 3% | 1% | 2% | | | | | 1% | 4% |
| | Organized sporting activity/ event | 2% | 2% | 3% | | | | 1% | 1% | 1% |
| | It is a safe place to spend a vacation | 2% | 2% | 1% | 4% | | | | 1% | 3% |
| | To golf | 2% | 2% | 1% | 4% | 17% | | 1% | 2% | 1% |
| | Magazines/ newspapers/ publications | 1% | 1% | 0% | 2% | | 2% | | | 2% |
| | Incentive trip | 1% | 1% | 1% | 4% | 100% | | | 0% | 0% |
| | Company/ business trip | 0% | 0% | | 6% | | | | 0% | 0% |
| | Adventure | 0% | 0% | 0% | | | | | | 0% |
| | Shop Guam e-Festival | 0% | 0% | 0% | 2% | | | | 0% | 1% |
| | School trip | 0% | 0% | 0% | | | | | 0% | |
| | Travel shows/ agents | 0% | 0% | 0% | | | | | 0% | |
| | Total | 1086 | 972 | 739 | 49 | 6 | 46 | 68 | 448 | 540 |

*Prepared by Anthology Research*

*Q:  What top three reasons motivated you to travel to Guam on this trip?*

SECTION 3

# EXPENDITURES

# PREPAID PACKAGE EXPENDITURES

- $2,568.95 = overall mean average prepaid package expense (for entire travel party) by respondent

- $807.70 = overall mean average **per person** prepaid package expenditures

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

# PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING
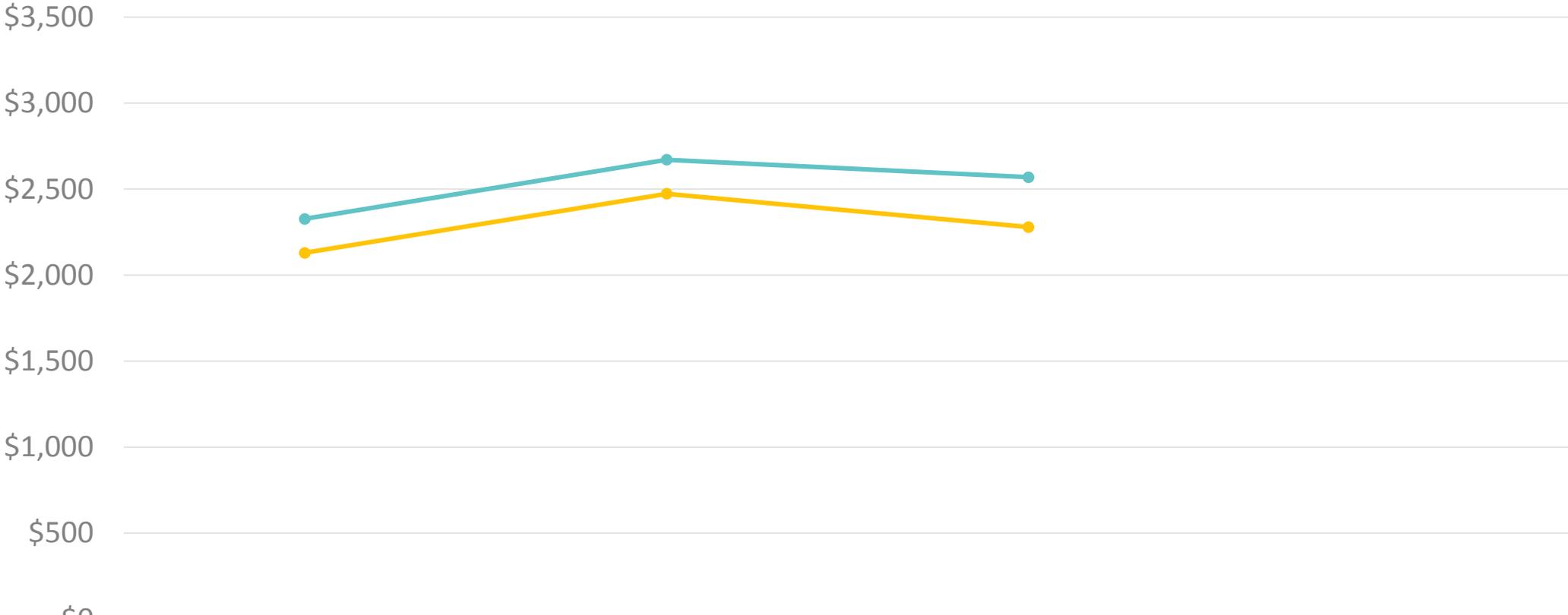


|  | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | $2,326.86 | $2,670.15 | $2,568.95 | |
| MEDIAN | $2,129.00 | $2,473.00 | $2,279.00 | |

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

# PREPAID PACKAGE – PER PERSON EXPENSE TRACKING
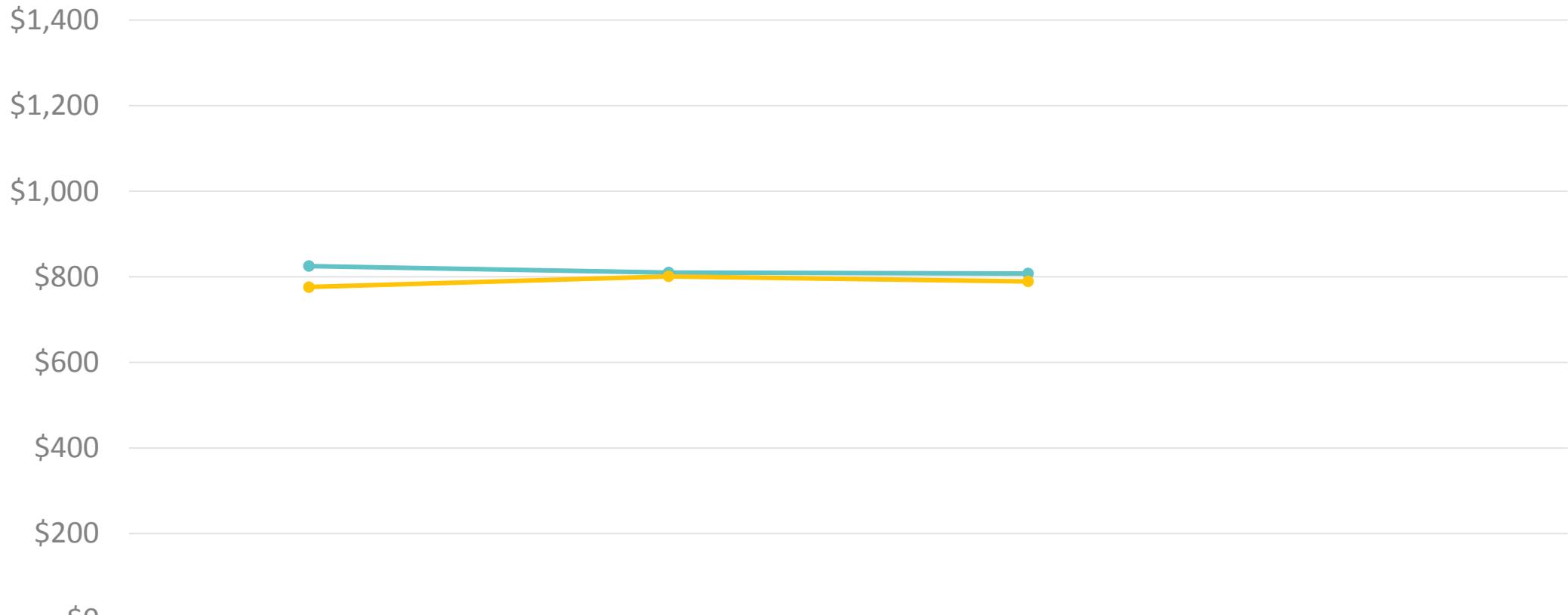


|  | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | $824.99 | $809.76 | $807.70 | |
| MEDIAN | $776.00 | $801.00 | $789.00 | |

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

# 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?  PER PERSON**

| | | TOTAL | FAMILY | FIT | GROUP TOUR | MICE | HONEYMOON | WEDDING | REPEAT | LEISURE TRVL |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| PREPAID PKG PER PERSON | Mean | $807.70 | $821.89 | $684.12 | $554.16 | $0.00 | $1,135.98 | $968.25 | $804.14 | $823.10 |
| | Median | $789 | $767 | $731 | $577 | $0 | $1,278 | $1,059 | $792 | $789 |

*Prepared by Anthology Research*

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

# PREPAID PACKAGE – BREAKDOWN



Legend: ■ MEAN  ■ MEDIAN

| | Airfare | Lodging | Other |
|---|---|---|---|
| MEAN | $896.83 | $1,074.37 | $591.12 |
| MEDIAN | $760 | $907 | $351 |

*Q: (OPTTIONAL) Of the total prepaid package trip cost, how much went towards…?*

# PREPAID PACKAGE – BREAKDOWN



*Q: What did the package trip include?*
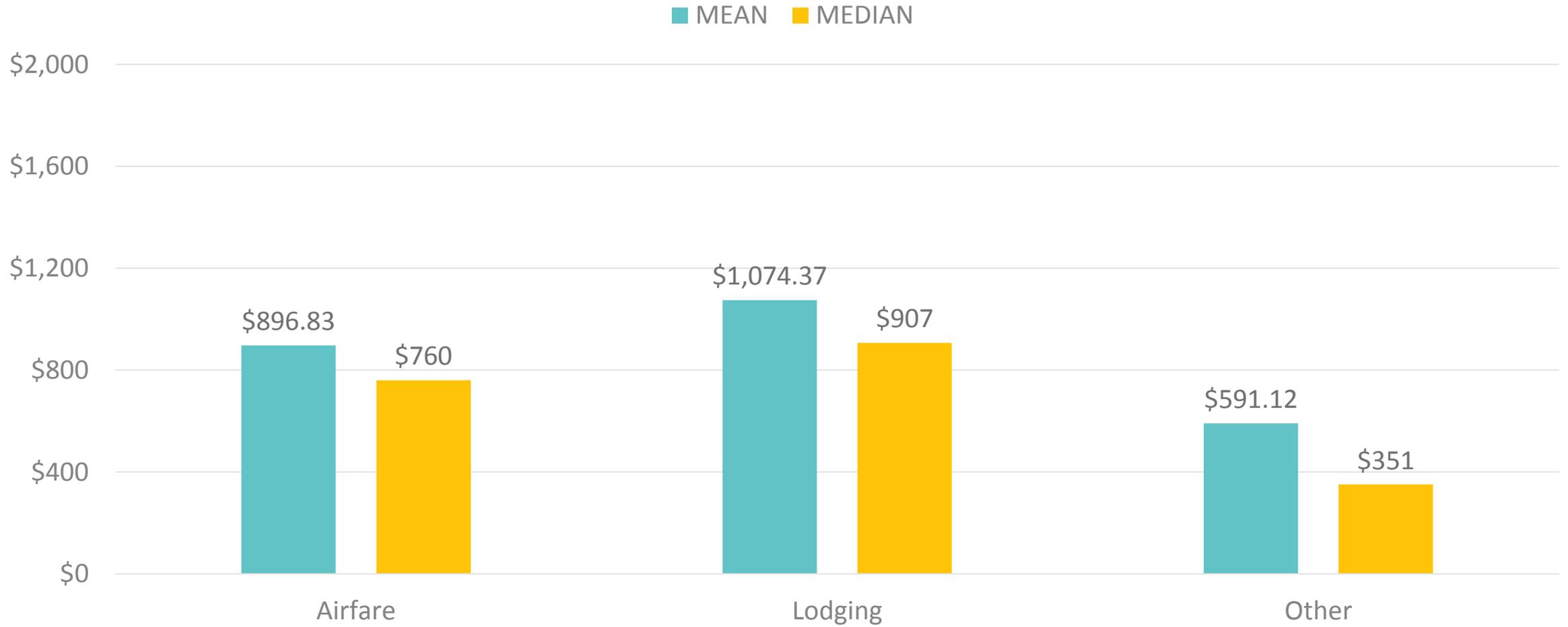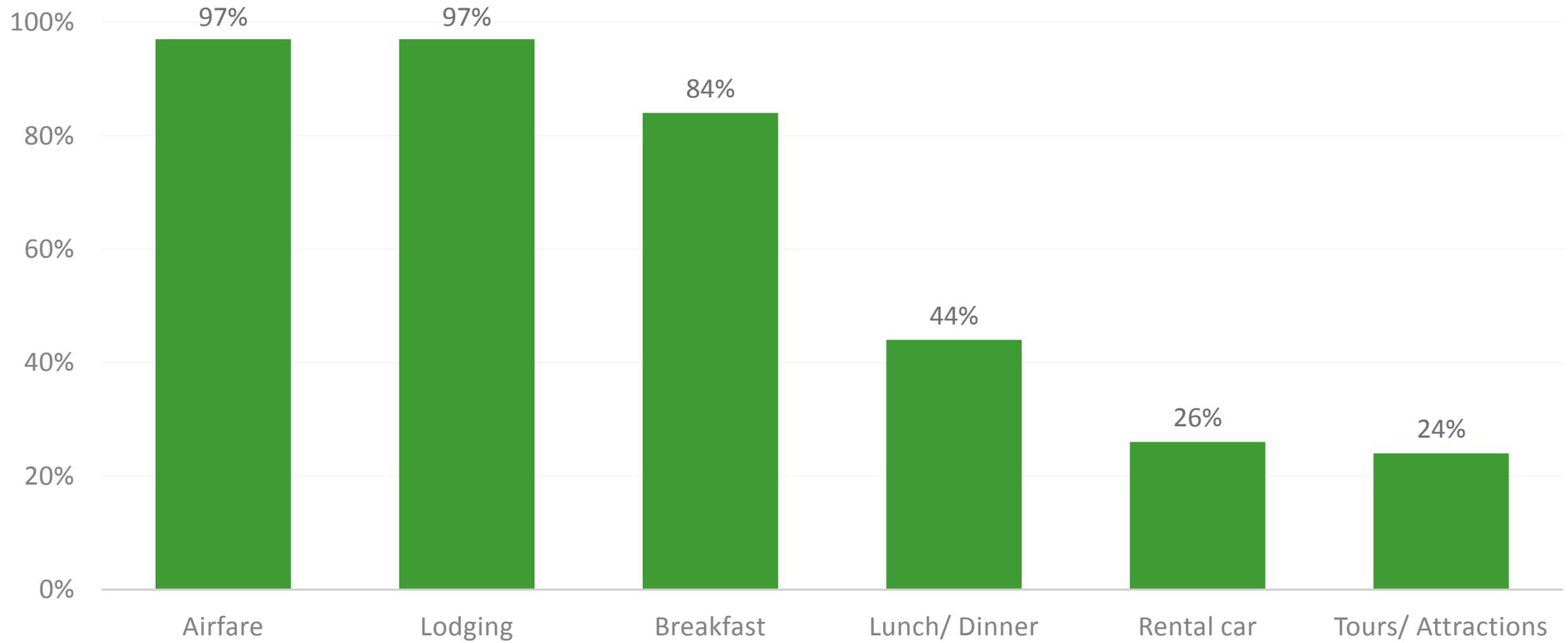
- $2,894.65 = overall mean average airfare expense (for entire travel party) by respondent

- $555.61 = overall mean average **per person** airfare expenditures

*Q: How much did 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 (GROUP) TRACKING
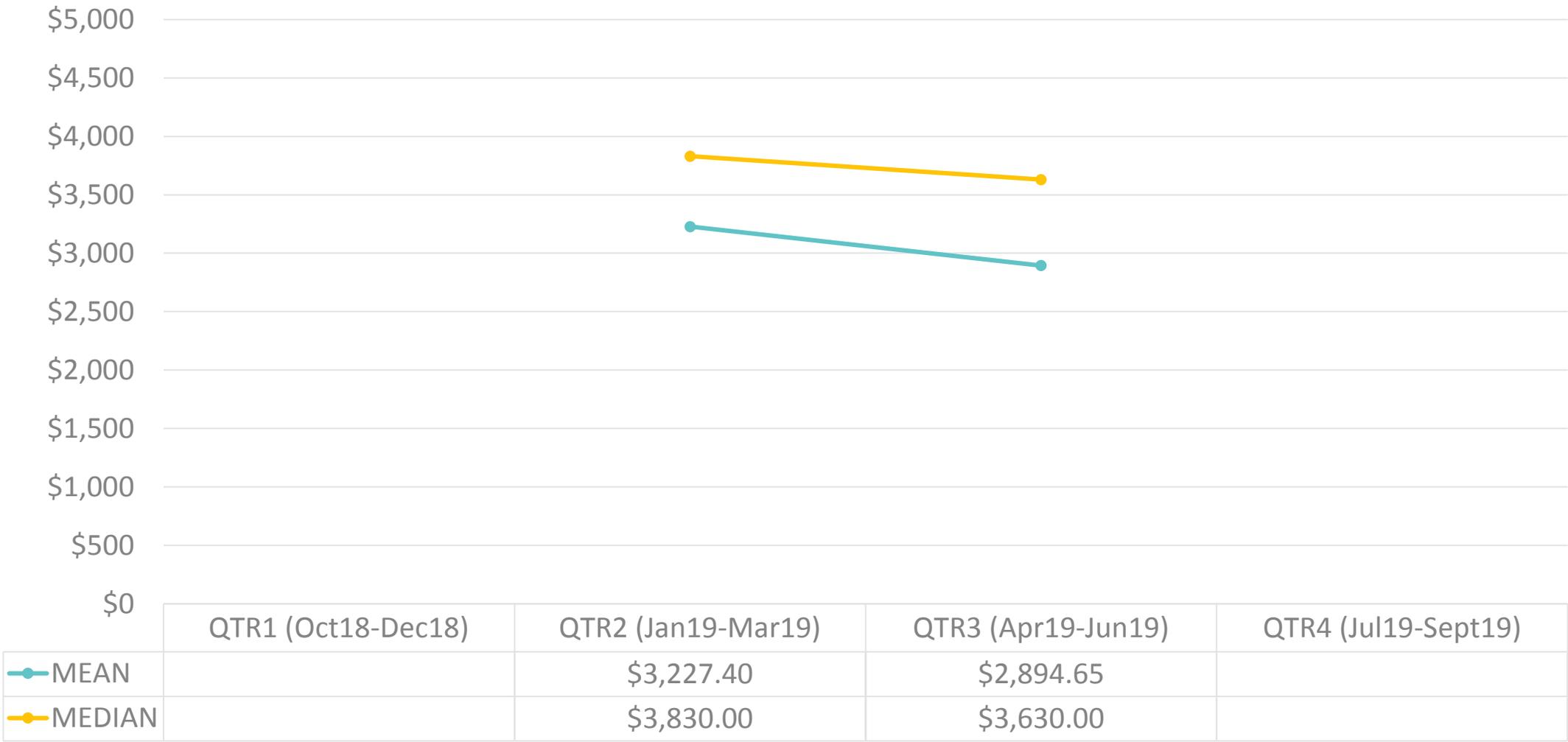


| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | | $3,227.40 | $2,894.65 | |
| MEDIAN | | $3,830.00 | $3,630.00 | |

*Q: How much did 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
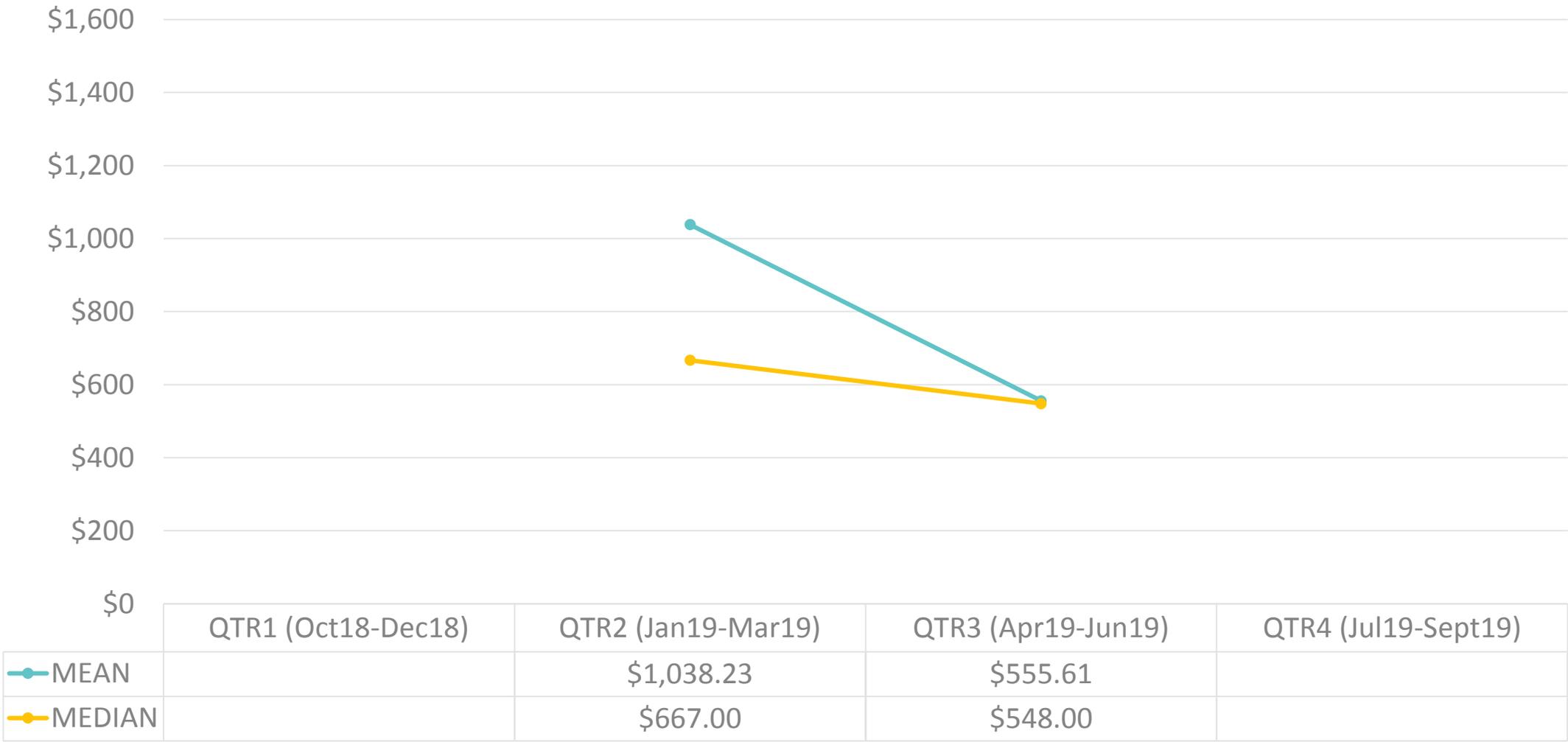
| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | | $1,038.23 | $555.61 | |
| MEDIAN | | $667.00 | $548.00 | |

*Q: How much did 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)?*

- $1,879.66 = overall mean average expense (for entire travel party) by respondent

- $562.52 = overall mean average **per person** expenditures

# ONISLE – TRAVEL PARTY TRACKING
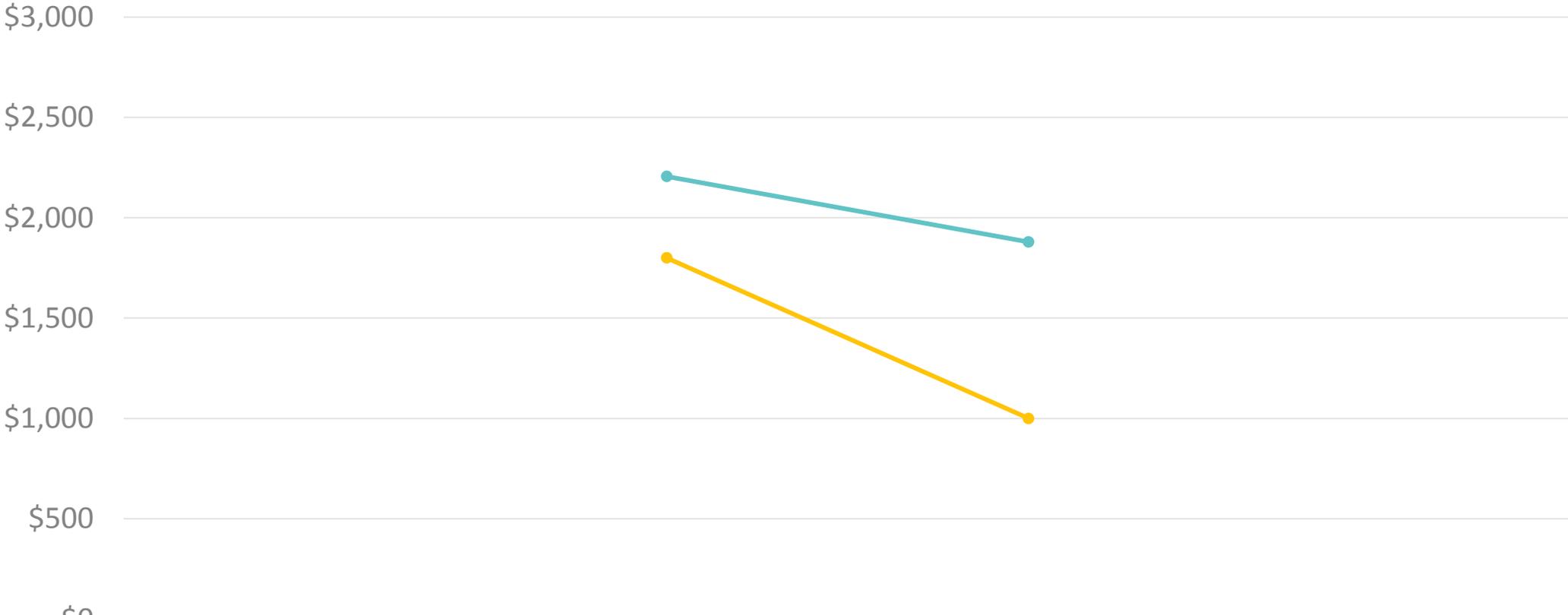
| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| —●— MEAN | | $2,206.38 | $1,879.66 | |
| —●— MEDIAN | | $1,800.00 | $1,000.00 | |

# ONISLE – PER PERSON TRACKING
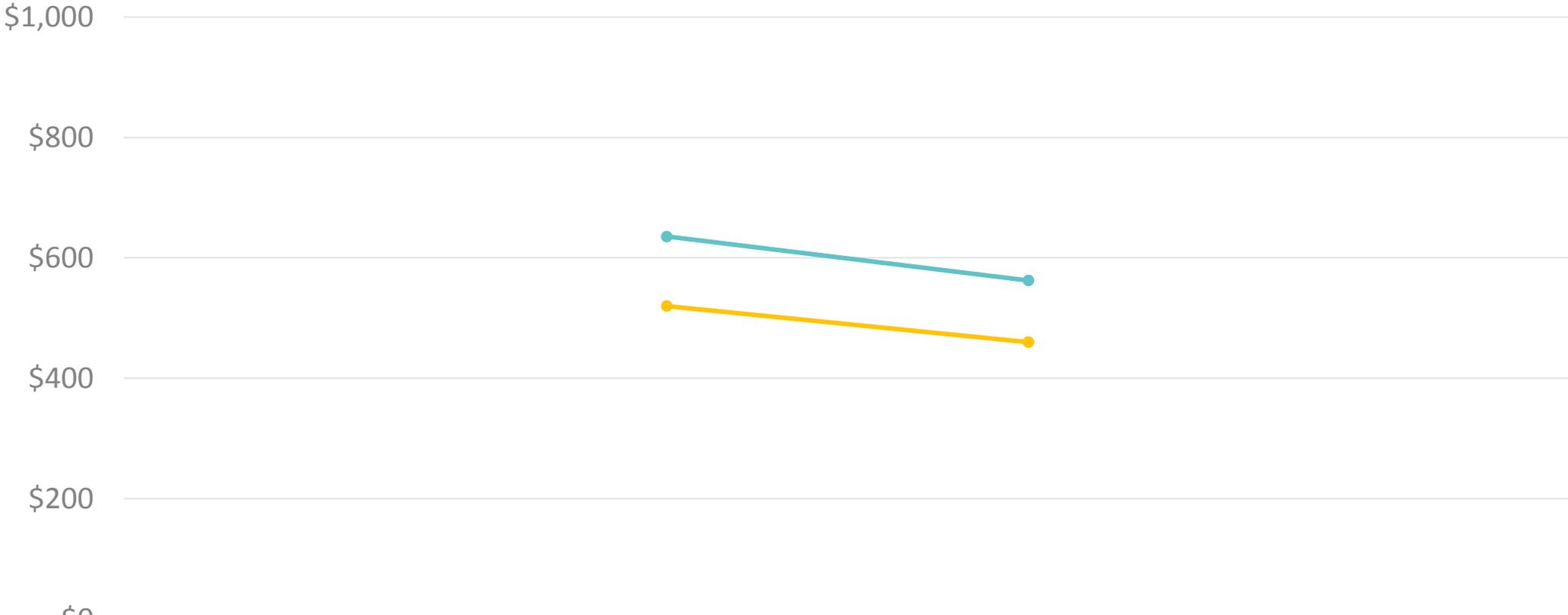
| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | | $635.52 | $562.52 | |
| MEDIAN | | $520.00 | $460.00 | |

# ONISLE – PER DAY SPENDING



Legend: ■ MEAN ■ MEDIAN

Travel Party: Mean $448.17, Median $292
Per Person: Mean $141.98, Median $100
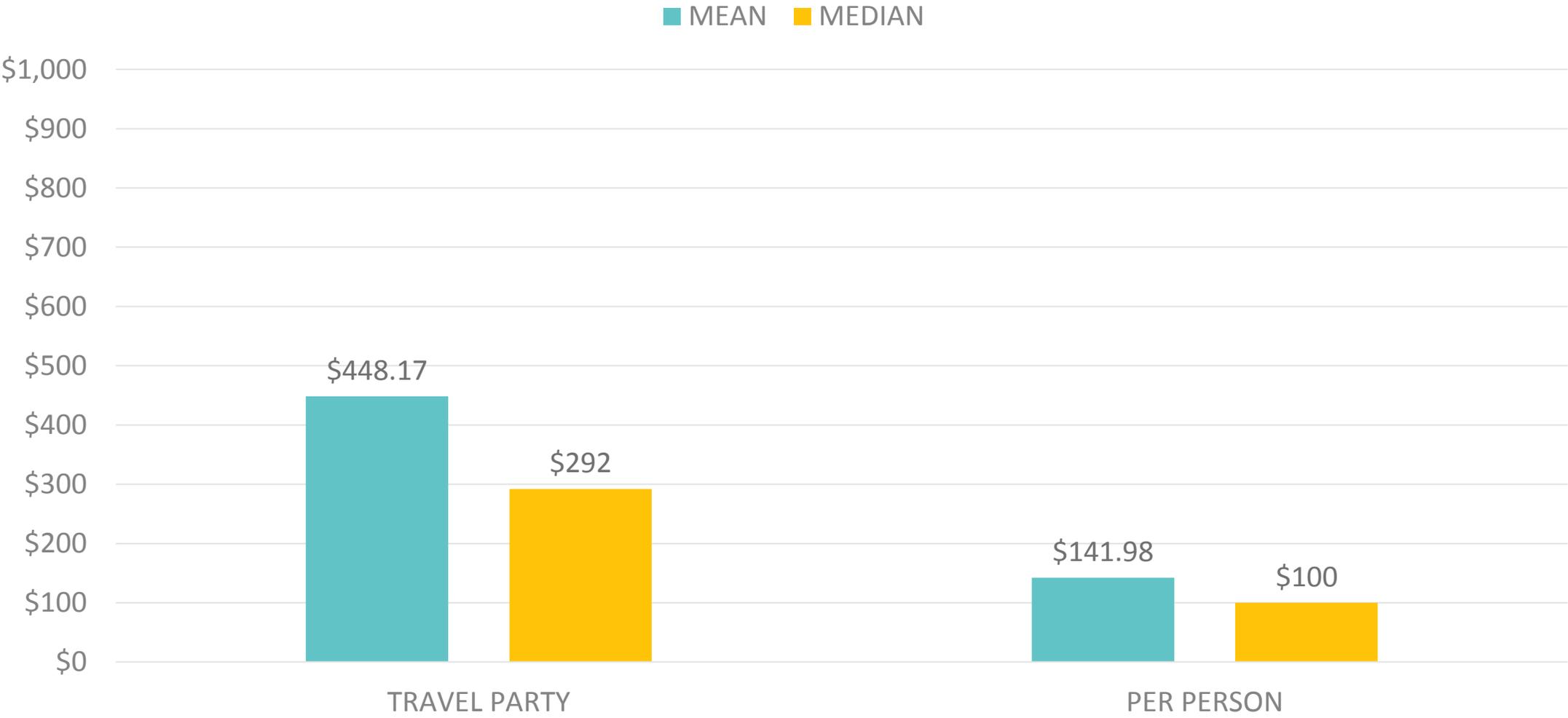
# ONISLE – TRAVEL PARTY/ PER DAY TRACKING



| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | | $500.72 | $448.17 | |
| MEDIAN | | $423.00 | $292.00 | |

54

# ONISLE – PER PERSON/ PER DAY TRACKING
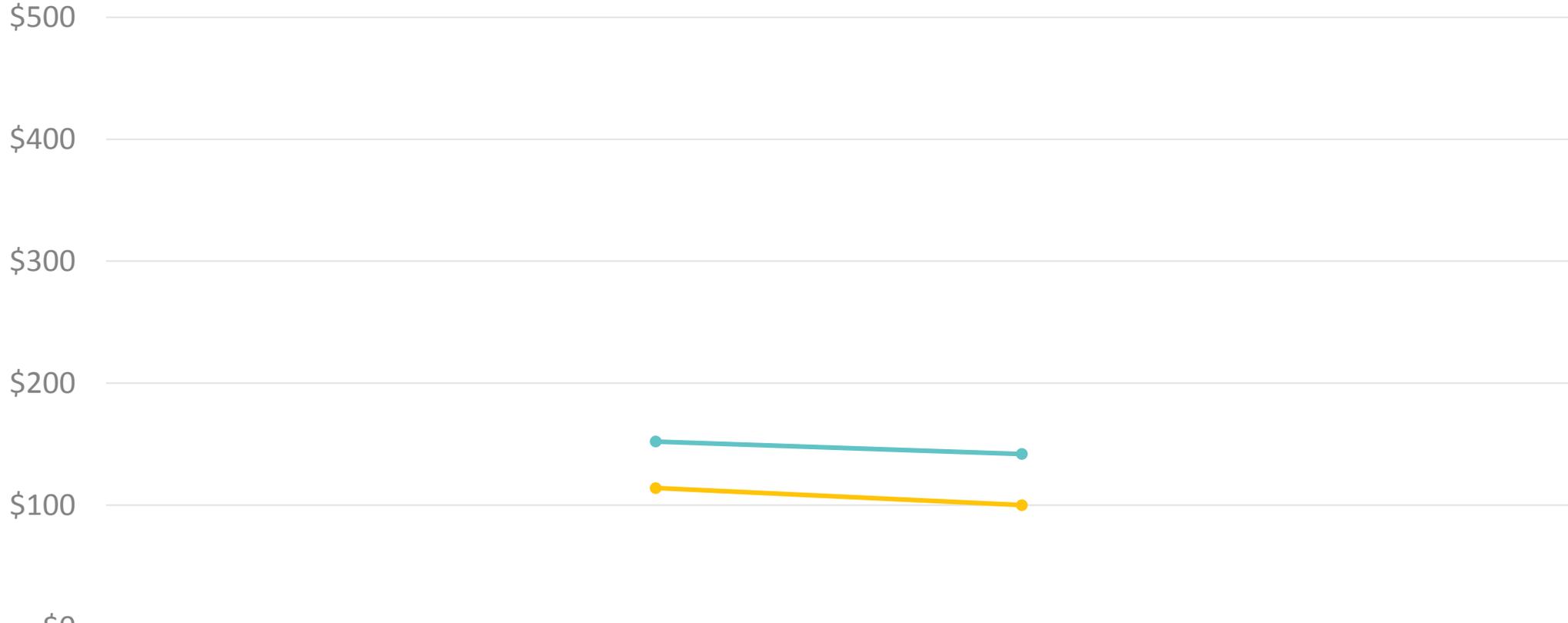


| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | | $152.15 | $141.98 | |
| MEDIAN | | $114.00 | $100.00 | |

55

# ONISLE – ACCOMMODATIONS



*Q: How much additional did you and your family spend on Guam – Lodging?*
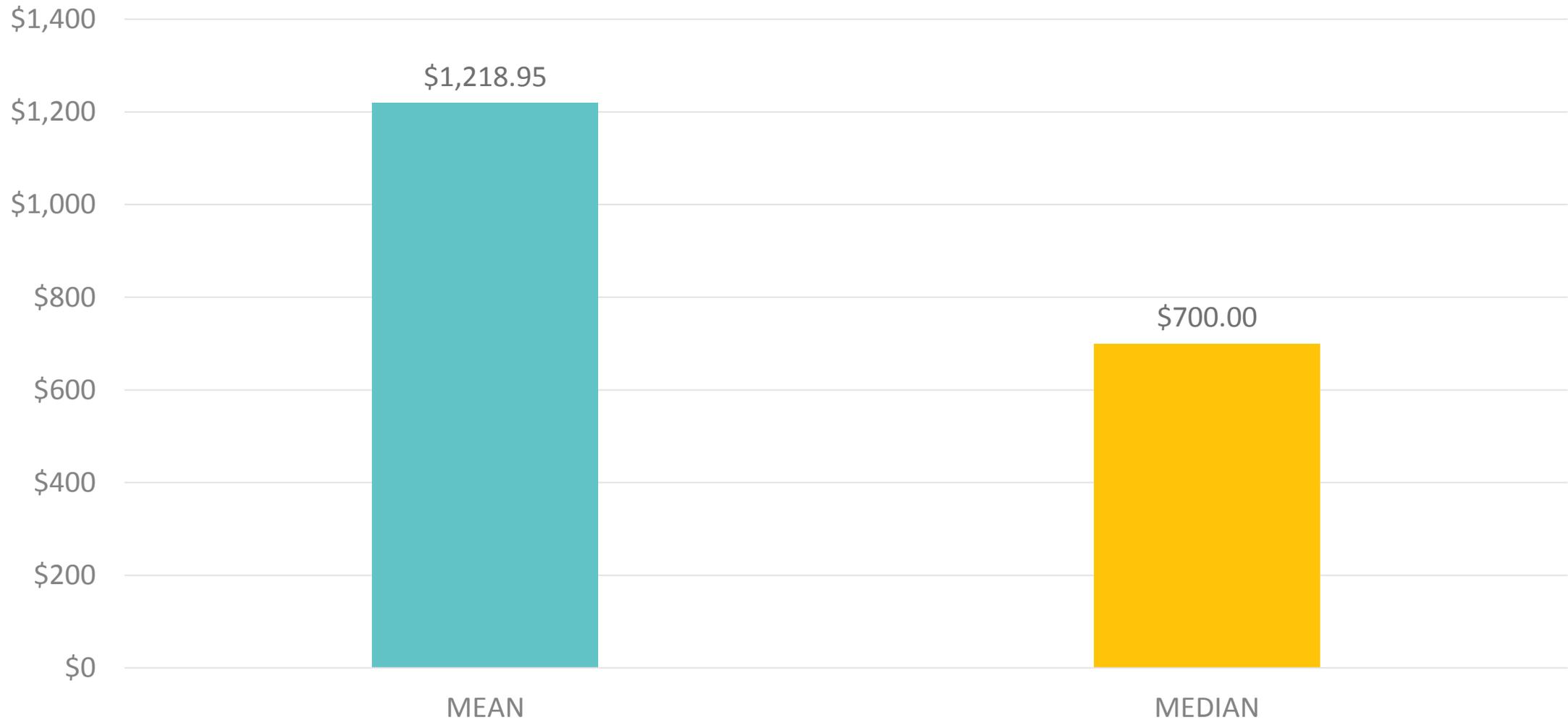
# ONISLE – ACCOMMODATIONS TRACKING



| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | | $1,241.21 | $1,218.95 | |
| MEDIAN | | $700.00 | $700.00 | |

*Q: How much additional did you and your family spend on Guam – Lodging?*
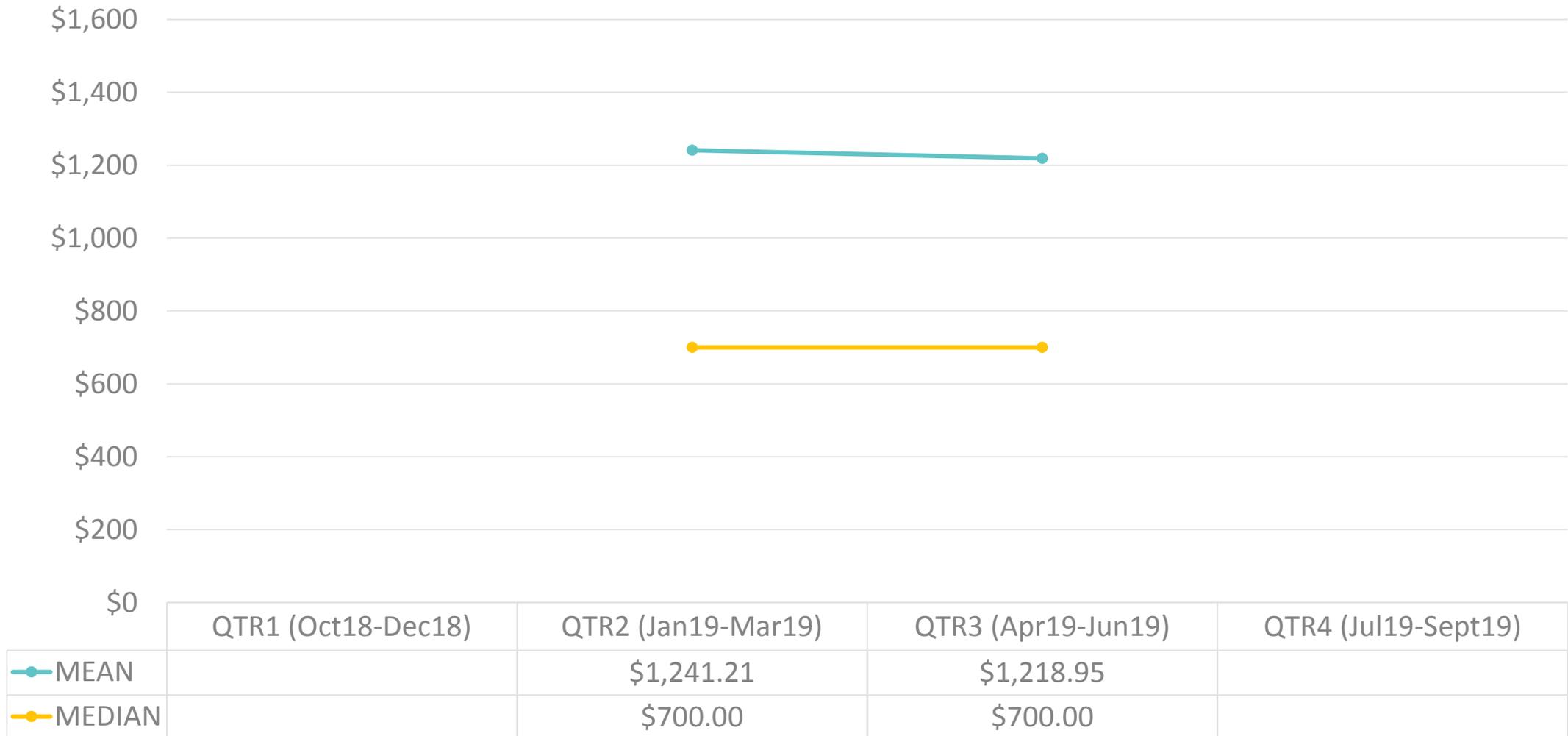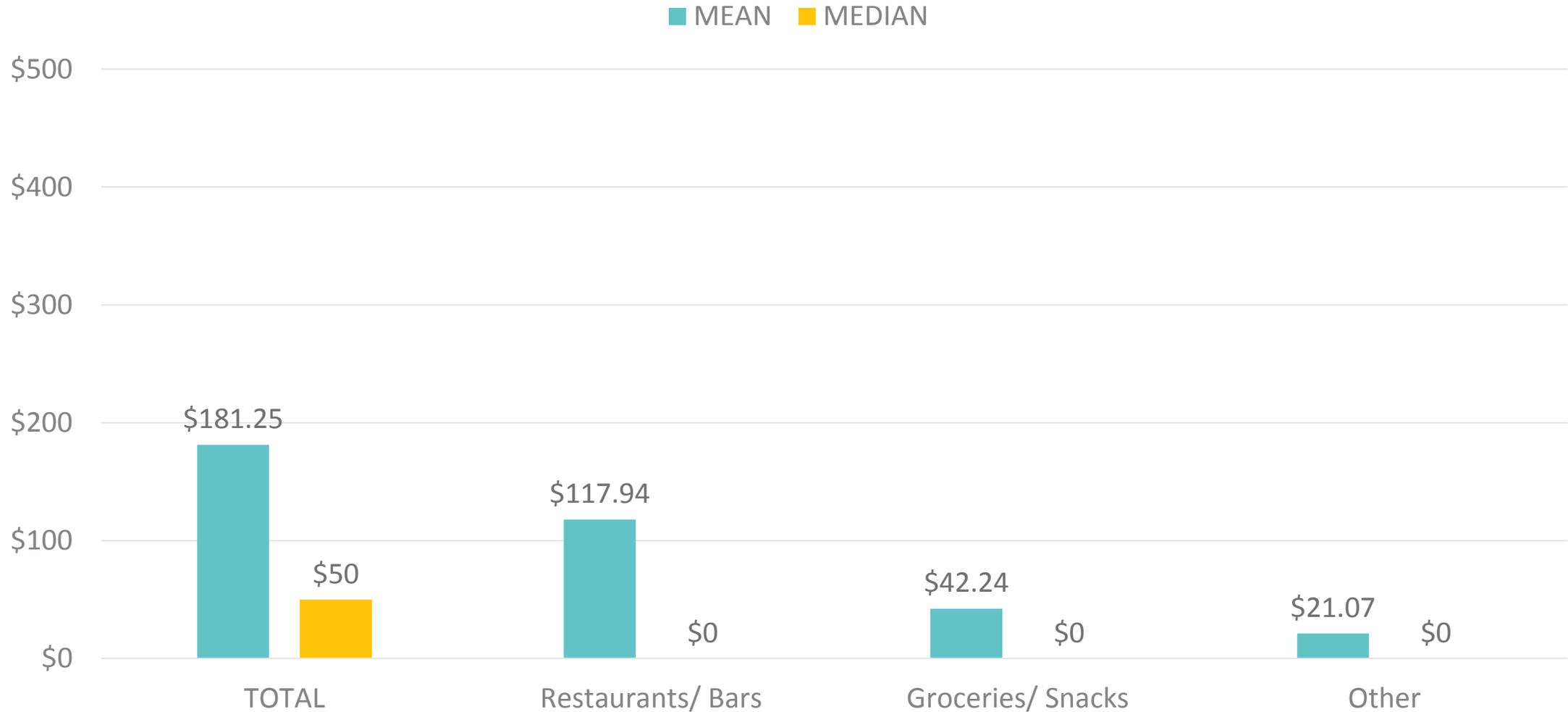
# ONISLE – TOTAL FOOD & BEVERAGE TRACKING

| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | | $235.93 | $181.25 | |
| MEDIAN | | $50.00 | $0.00 | |

*Q: How much additional did you and your family spend on Guam – Food & Beverage?*

# ONISLE – ENTERAINMENT & RECREATION

■ MEAN  ■ MEDIAN

$300

$200

$100

$120.95

$45.31

$40.74

$34.90

$0 $0 $0 $0

$0

TOTAL | Attractions & Entertainment | Other Activities/ Tours | Recreation & Sports

*Q: How much additional did you and your family spend on Guam – Entertainment & Recreation?*

[A] | GUAM VISITORS BUREAU | GUAM

# ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING



| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | | $179.39 | $120.95 | |
| MEDIAN | | $0.00 | $0.00 | |

*Q: How much additional did you and your family spend on Guam – Entertainment & Recreation?*

# ONISLE – TRANSPORTATION

■ MEAN  ■ MEDIAN



| | TOTAL | Rental Car/ scooter/ bicycle | Bus, taxi, trolley, etc | Other |
|---|---|---|---|---|
| MEAN | $95.15 | $50.49 | $32.16 | $12.50 |
| MEDIAN | $0 | $0 | $0 | $0 |
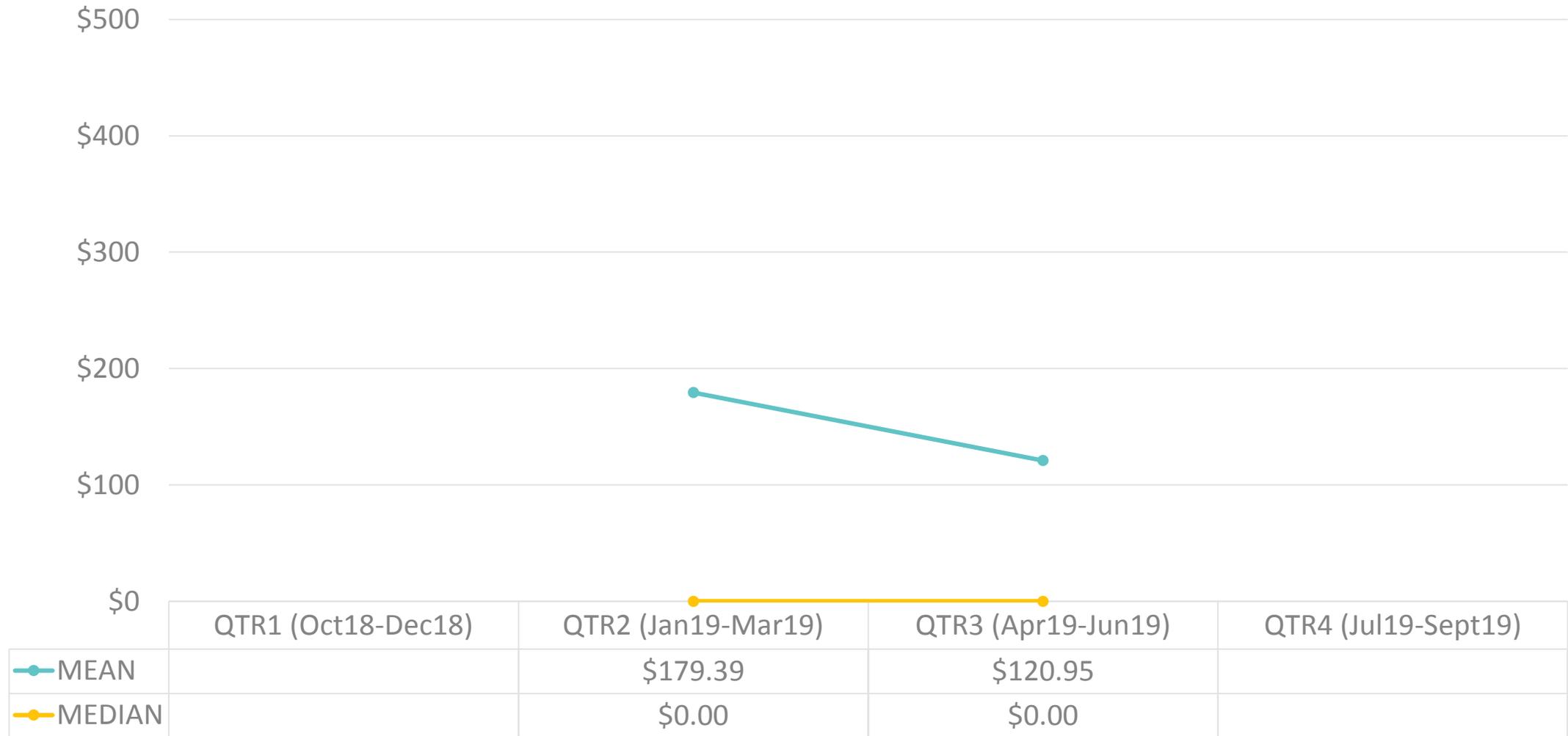
*Q: How much additional did you and your family spend on Guam – Transportation?*
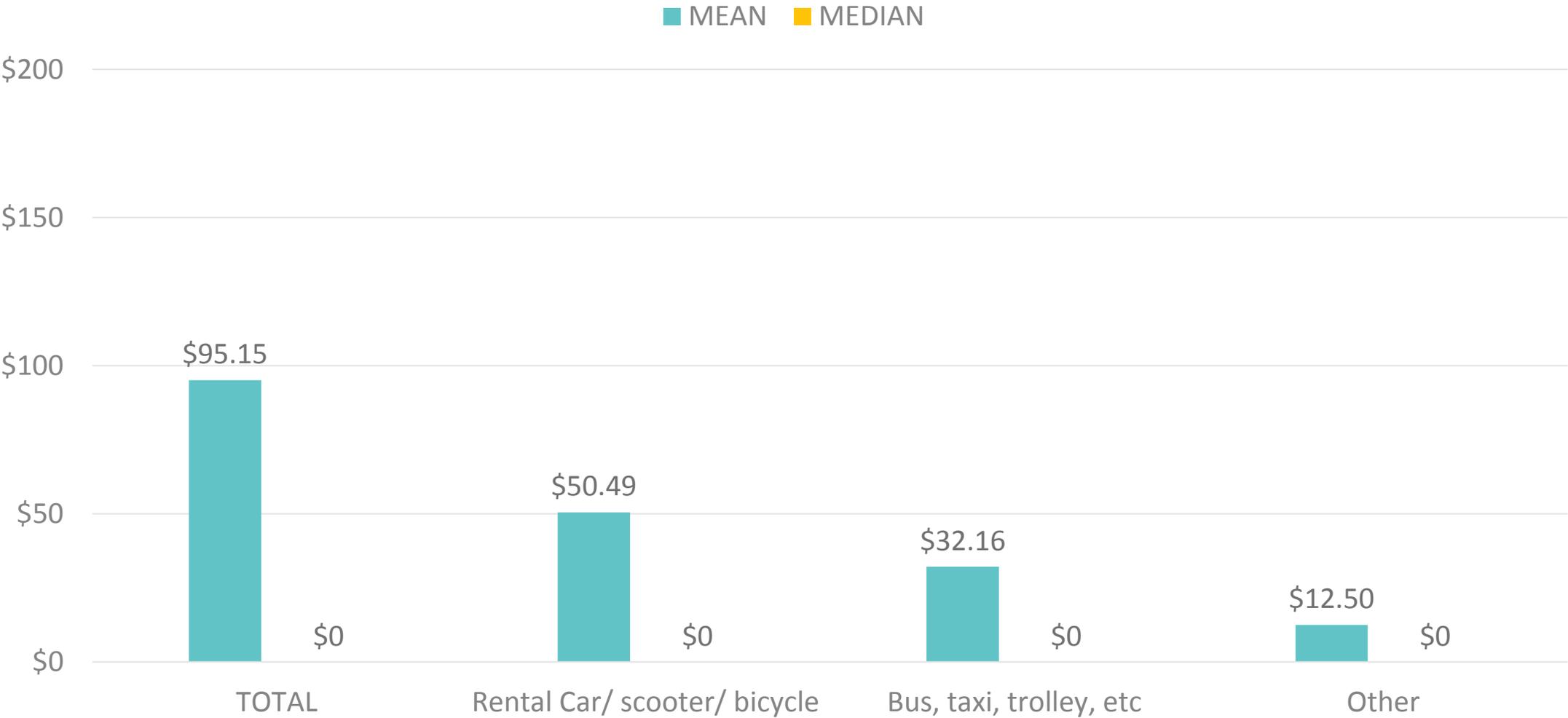
# ONISLE – TOTAL TRANSPORTATION TRACKING



| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | | $140.40 | $95.15 | |
| MEDIAN | | $0.00 | $0.00 | |

*Q: How much additional did you and your family spend on Guam – Transportation?*
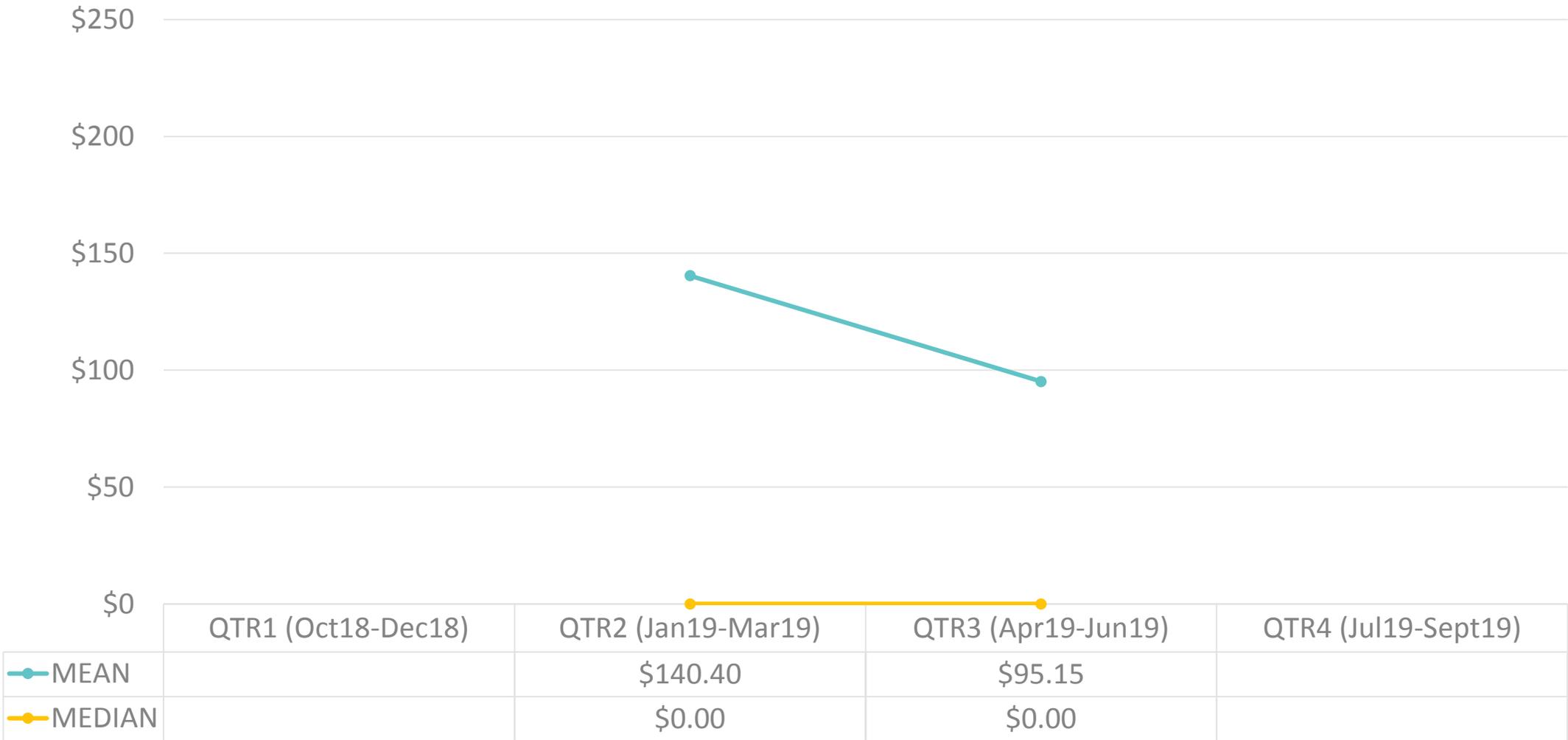
# ONISLE – SHOPPING



■ MEAN   ■ MEDIAN

| | TOTAL | Fashion & Clothing | Accessories | Cosmetics/ perfume | Food - take home | Souvenirs | Jewelry/ watches | Other |
|---|---|---|---|---|---|---|---|---|
| MEAN | $283.97 | $100.67 | $61.09 | $31.61 | $25.52 | $23.05 | $22.46 | $19.57 |
| MEDIAN | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |

*Q:  How much additional did you and your family spend on Guam – Shopping?*
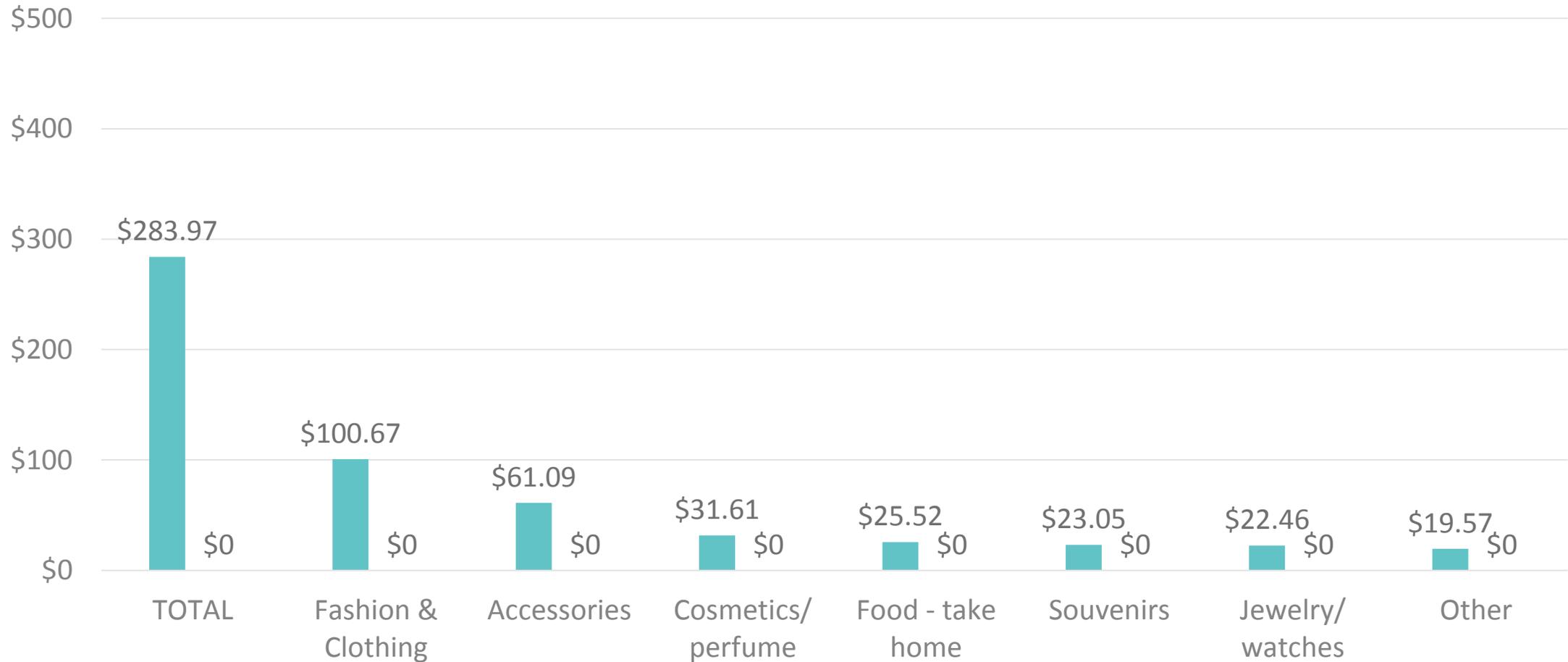
# ONISLE – TOTAL SHOPPING TRACKING



| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | | $364.81 | $283.97 | |
| MEDIAN | | $0.00 | $0.00 | |

*Q: How much additional did you and your family spend on Guam – Shopping?*
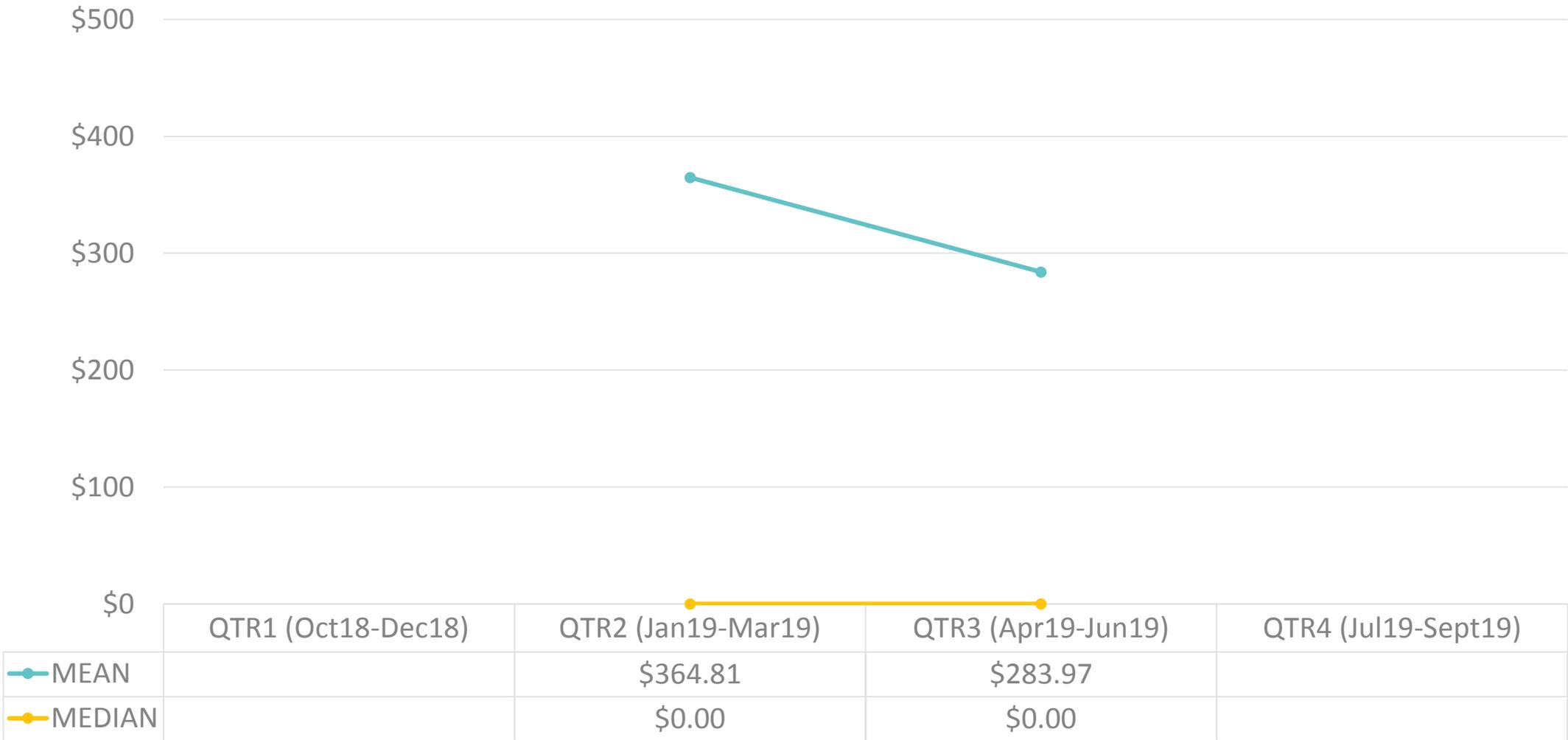
# ONISLE – MISCELLANEOUS TRACKING



| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | | $114.98 | $40.00 | |
| MEDIAN | | $0.00 | $0.00 | |

*Q: How much additional did you and your family spend on Guam – Other spending?*
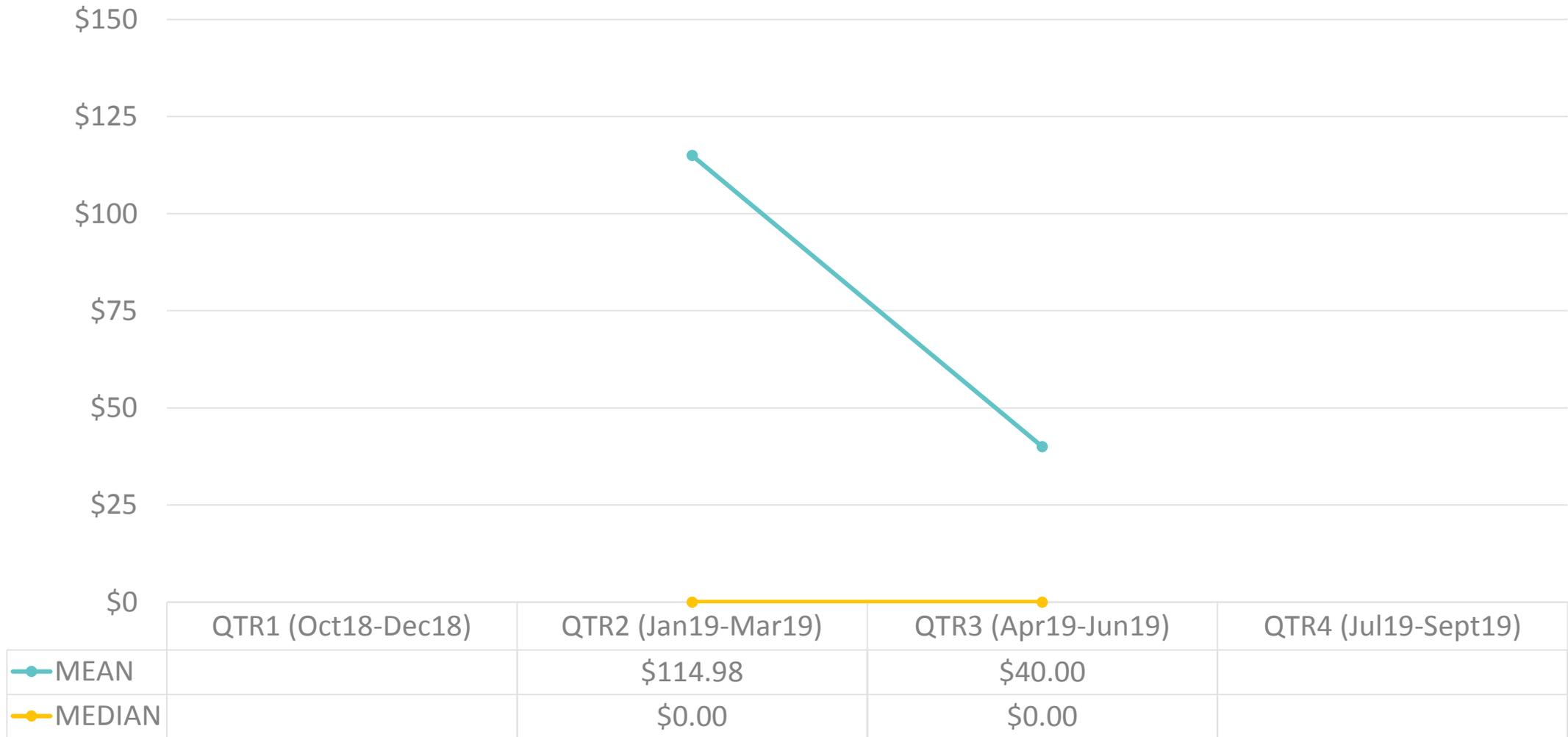
# TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

- $1,199.68 = Mean average per person

- $1,014.00 = Median amount spent per person

# TOTAL EXPENDITURES PER PERSON TRACKING
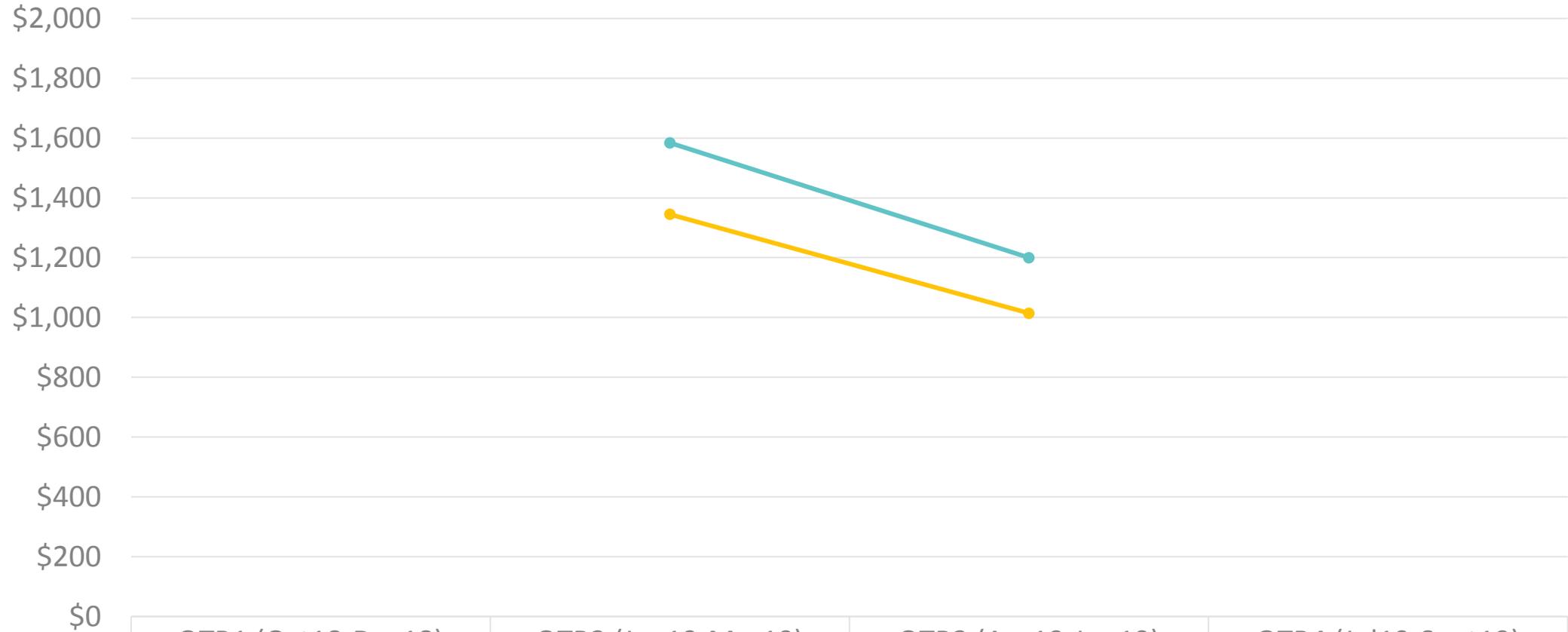
| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| ●— MEAN | | $1,584.07 | $1,199.68 | |
| ●— MEDIAN | | $1,345.00 | $1,014.00 | |

*ONISLE EXPENDITURE + PREPAID*

# GUAM AIRPORT EXPENDITURE TRACKING

| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| MEAN | $133.77 | $329.25 | $124.31 | |
| MEDIAN | $28.00 | $44.00 | $0.00 | |

*Q: How much in total did you spend on your purchases at the airport for shopping, dining, etc?*
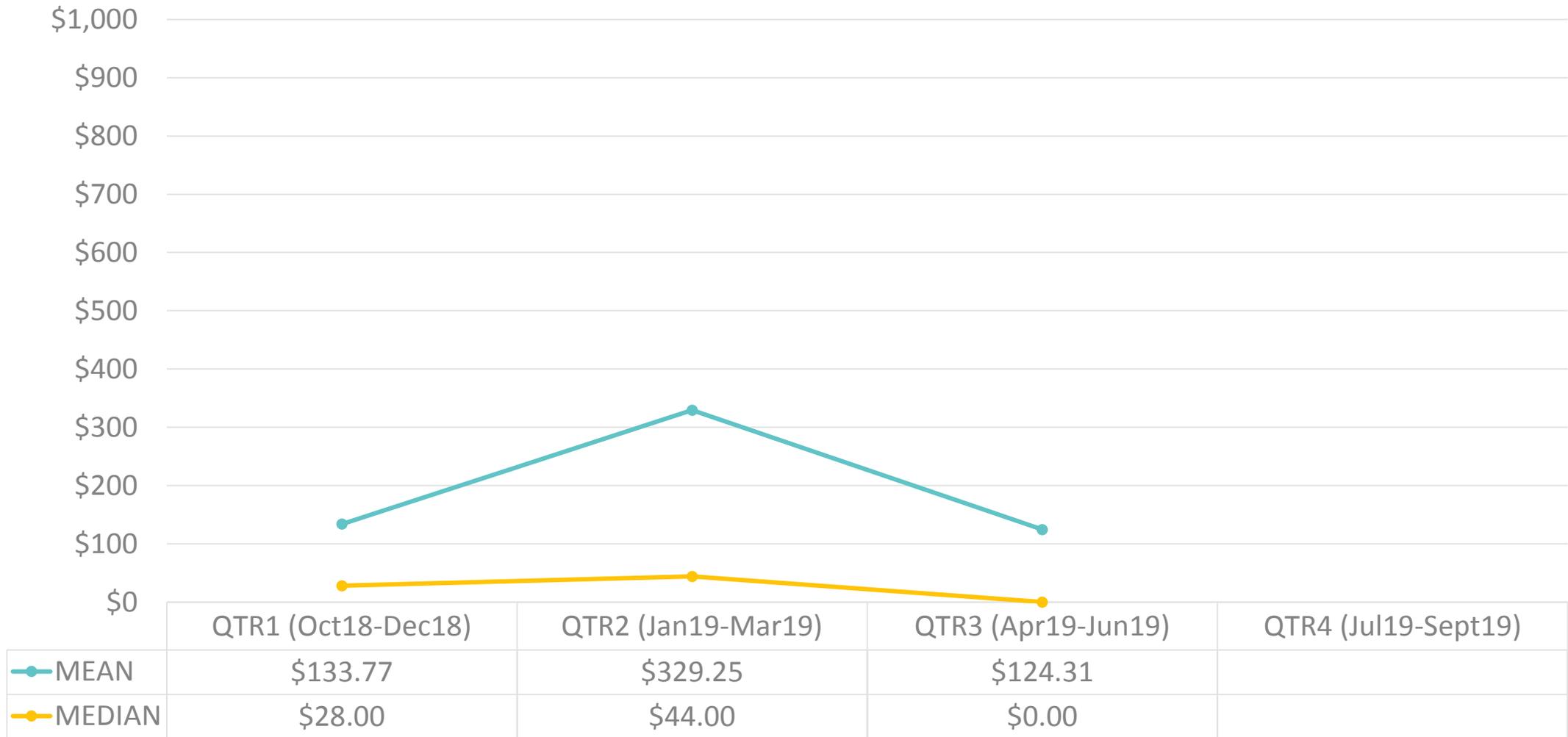
SECTION 4
# VISITOR SATISFACTION

# OVERALL SATISFACTION – 7PT SCALE



Q: Overall, how satisfied are you with your experience while on Guam?

72
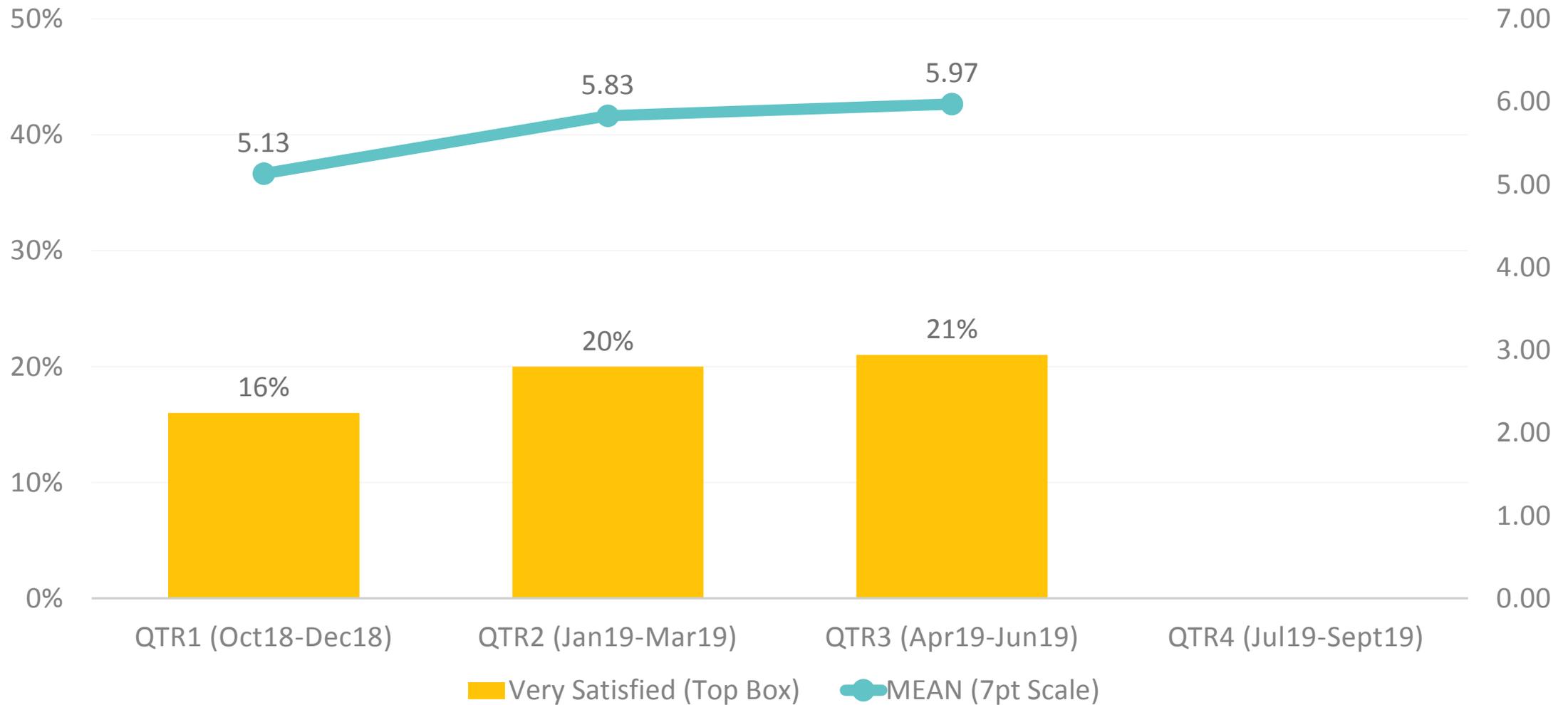
# OVERALL SATISFACTION – 10PT SCALE



QTR1 (Oct18-Dec18)     QTR2 (Jan19-Mar19)     QTR3 (Apr19-Jun19)     QTR4 (Jul19-Sept19)

Very Satisfied (Top Box 9-10)     MEAN (10pt Scale)

*Q: Overall, how satisfied are you with your experience while on Guam?*

# SWOT – POSITIVE ASPECT OF TRIP



| Category | Percentage |
|---|---|
| Event- fam/friend | 27% |
| Beach/ ocean | 15% |
| Event- participant | 10% |
| Shopping | 10% |
| Natural beauty | 10% |
| Relax | 10% |
| Activities- variety | 8% |
| Hotel/ Accommodations | 3% |
| Weather | 1% |
| Sightseeing | 1% |
| Cust Svc | 1% |
| Safe | 1% |
| Hafa Adai | 1% |

*Q: Please tell us about one detail that made your trip to Guam excellent?*
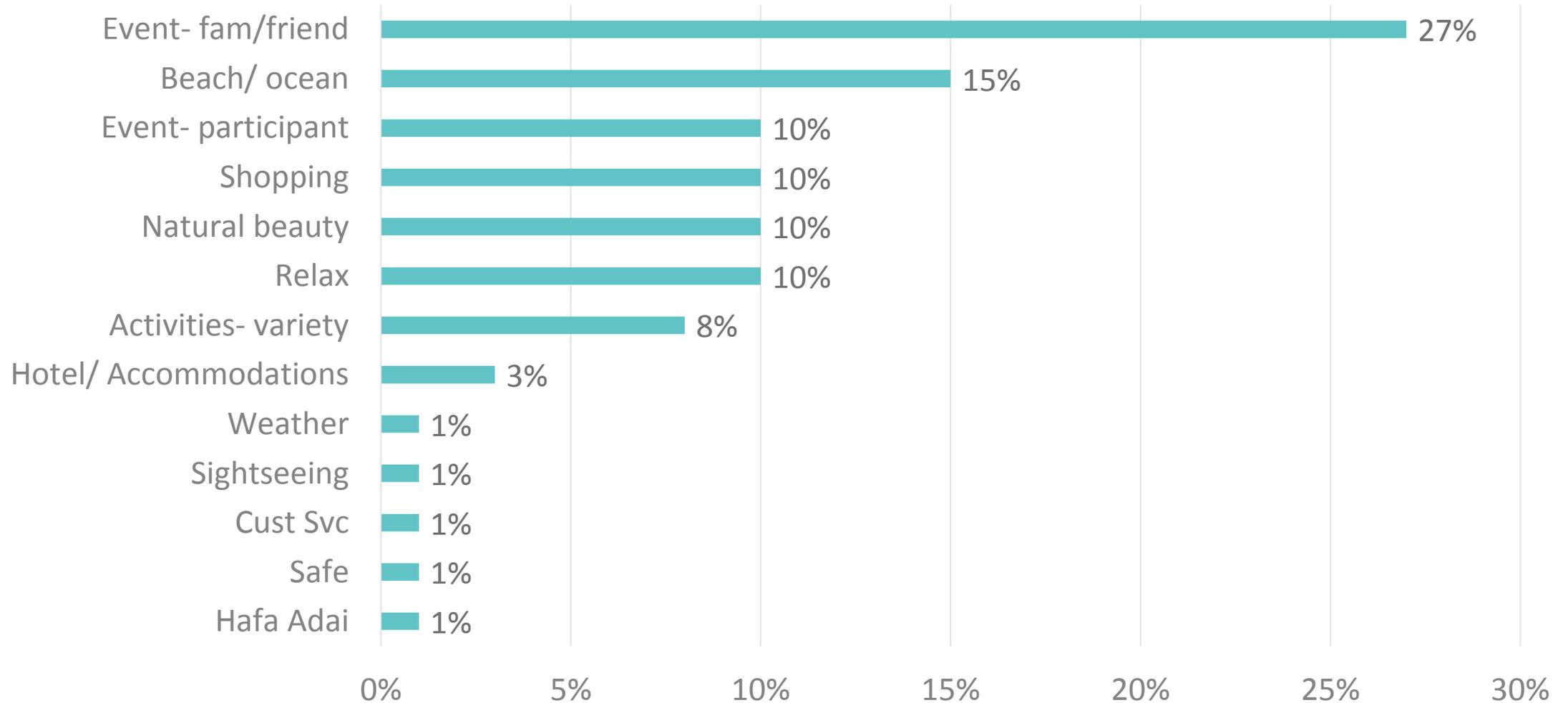
# SWOT – NEGATIVE ASPECT OF TRIP

Nothing 61%
Expensive 10%
Food 8%
Immigration 4%
Customer svc 3%
No local culture 2%
Accommodations- cleanliness 2%
Safety 2%
Activities- variety 1%
Language 1%
Driving exp 1%

0%　10%　20%　30%　40%　50%　60%　70%

*Q: Please tell us about one detail that made your trip to Guam excellent?*
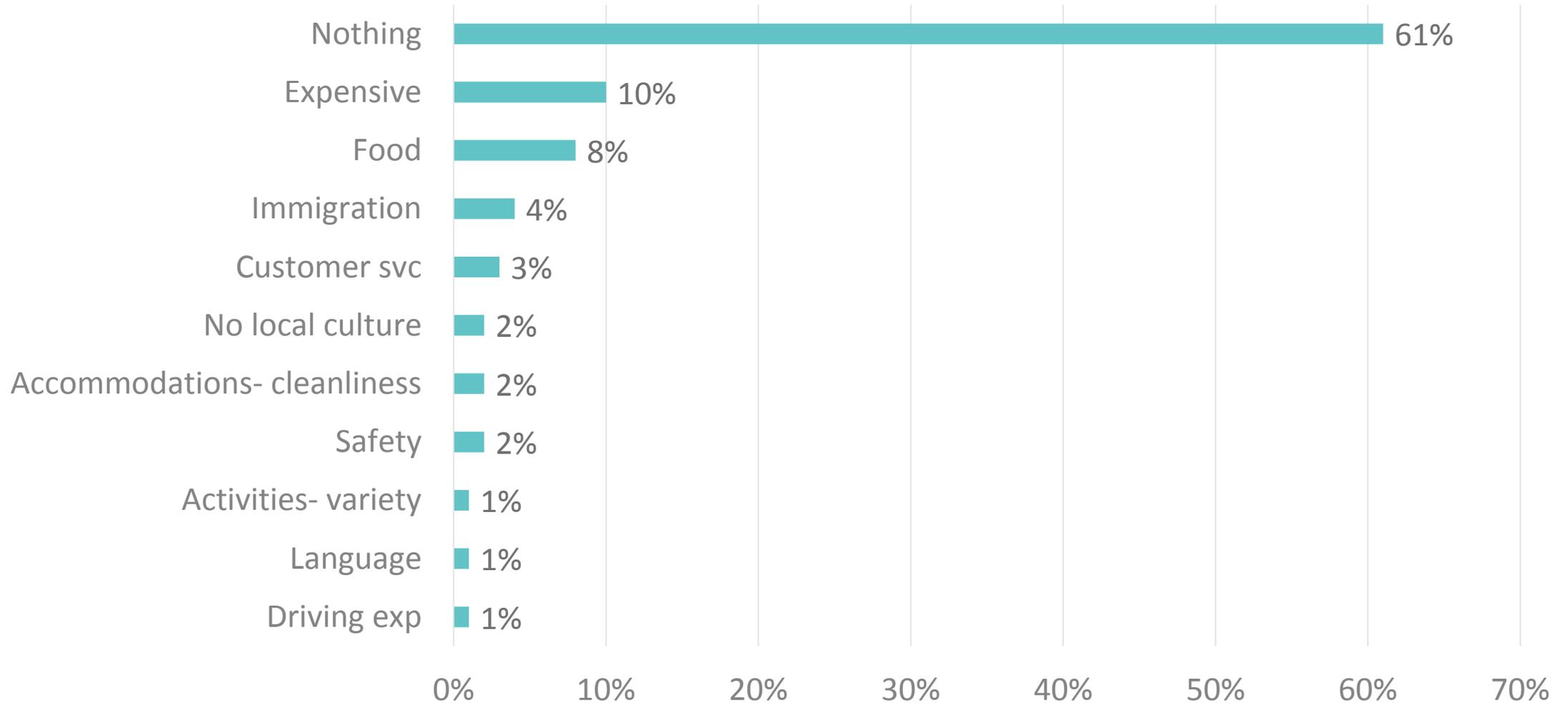
# SATISFACTION – ENTERTAINMENT



Very Satisfied (Top Box 9-10) — MEAN

*Q: Please rate your satisfaction with the following aspects of your trip to Guam?*

# SATISFACTION – SHOPPING



Q: Please rate your satisfaction with the following aspects of your trip to Guam?

# SATISFACTION – DINING



Very Satisfied (Top Box 9-10) ▬▬ MEAN

*Q: Please rate your satisfaction with the following aspects of your trip to Guam?*

# SATISFACTION – BEACHES



Very Satisfied (Top Box 9-10)　　MEAN

*Q: Please rate your satisfaction with the following aspects of your trip to Guam?*

# SATISFACTION – ROADS



100% — 10.00
90% — 9.00
80% — 8.00
70% — 7.07 — 7.00
60% — 5.93 — 6.00
50% — 5.00
41% — 4.00
30% — 3.00
20% — 19% — 2.00
10% — 1.00
0% — 0.00

QTR1 (Oct18-Dec18)    QTR2 (Jan19-Mar19)    QTR3 (Apr19-Jun19)    QTR4 (Jul19-Sept19)

■ Very Satisfied (Top Box 9-10)    ━●━ MEAN

*Q: Please rate your satisfaction with the following aspects of your trip to Guam?*

# SATISFACTION – SIGHTSEEING AREAS



**Very Satisfied (Top Box 9-10)** ——**MEAN**

*Q: Please rate your satisfaction with the following aspects of your trip to Guam?*
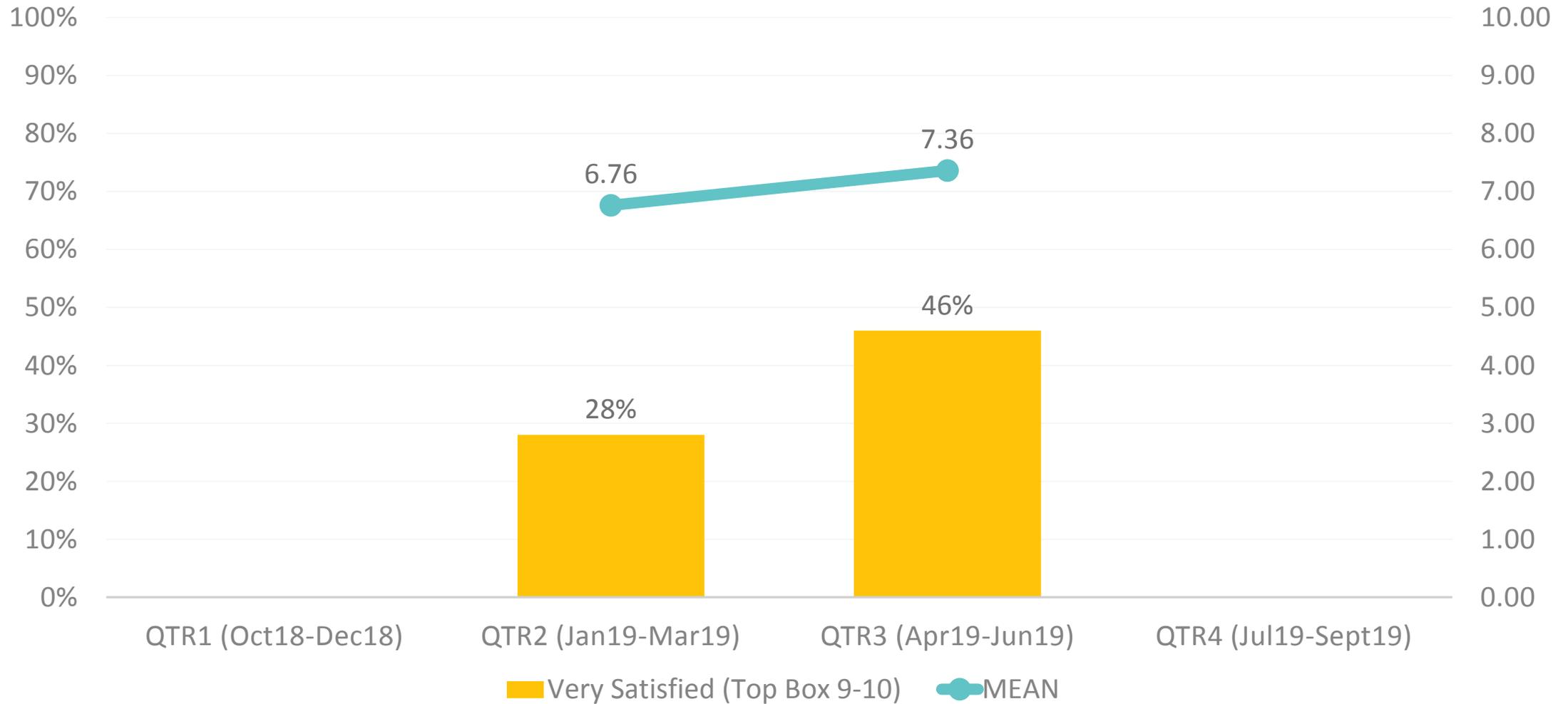
# SATISFACTION – SAFETY & SECURITY



Q: Please rate your satisfaction with the following aspects of your trip to Guam?
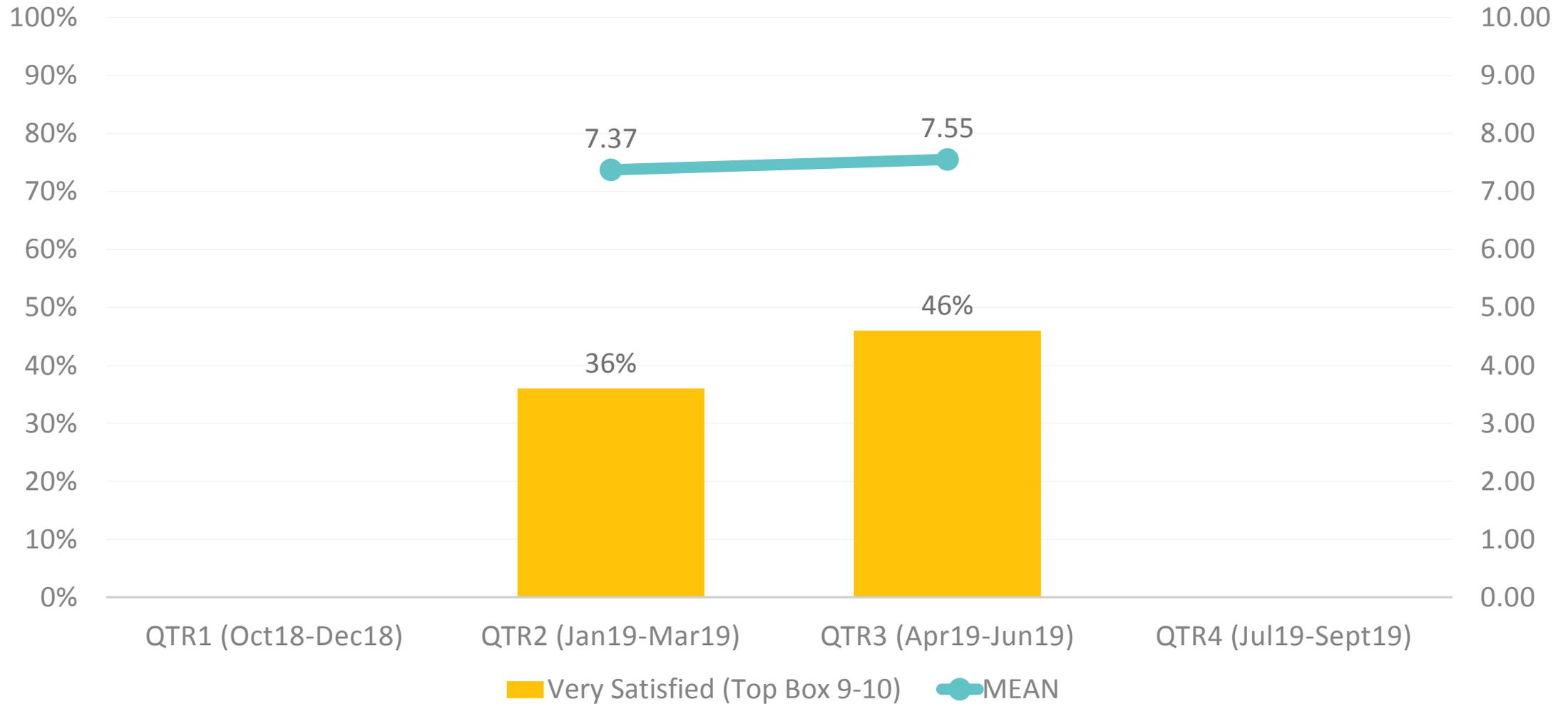
# SATISFACTION – ACCOMMODATIONS



QTR1 (Oct18-Dec18)     QTR2 (Jan19-Mar19)     QTR3 (Apr19-Jun19)     QTR4 (Jul19-Sept19)

■ Excellent (Top Box 9-10)    ━━ MEAN

84    *Q: Overall, how would you rate your lodging/ hotel accommodations?*

# BRAND ADVOCACY



| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| Extremely likely (Top Box 9-10) | | 34% | 39% | |
| MEAN | | 7.56 | 7.89 | |

Extremely likely (Top Box 9-10) ⬤MEAN

*Q: How likely are you to recommend Guam to your family and friends?*

# BRAND LOYALTY



*Q: How likely are you to return to visit Guam in the next three years?*

# TRIP EXPECTATIONS



**Guam did not meet my expectations** 8%

**Guam met my expectations** 30%

**Guam exceeded my expectations** 62%

*Q: Would you say this trip to Guam...?*

# TRIP EXPECTATIONS – TRACKING



| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| Exceeded expectations | | 37% | 63% | |
| Met expectations | | 44% | 30% | |
| Did not meet expectations | | 19% | 8% | |

*Q: Would you say this trip to Guam…?*

SECTION 5
# VISITOR ACTIVITIES

# SHOPPING AREAS – PENETRATION



*Q: Guam has a number of shopping malls and stores. Please check all those visited during this trip*
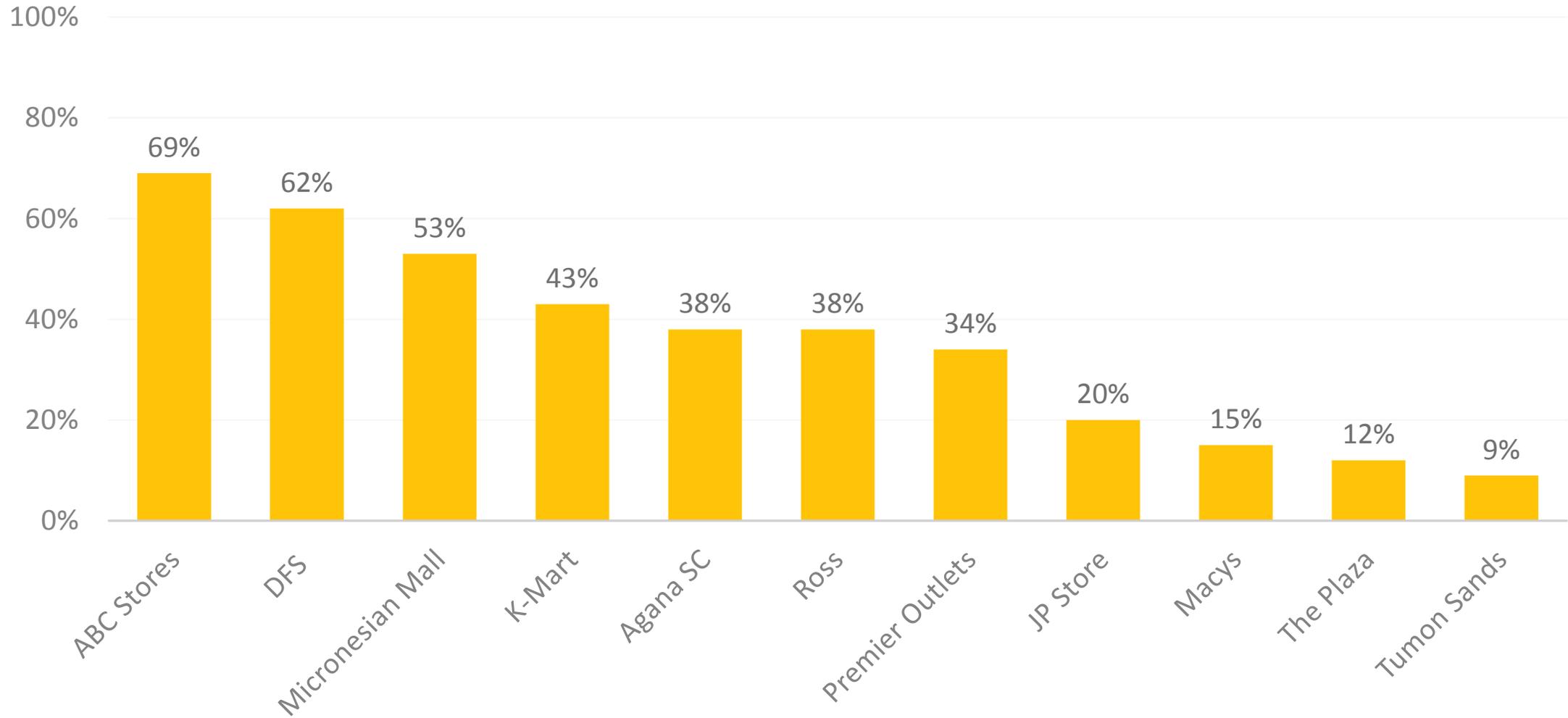
# ACTIVITIES – SIGHTSEEING



*Q: During this trip to Guam, which of the following activities did you participate in?*

# ACTIVITIES – RECREATION



Spa 46%
Shopping 40%
Boat cruise 37%
Beach/sunbathing 30%
Swimming in ocean 30%
Water park 24%
Hiking
Off-roading

*Q: During this trip to Guam, which of the following activities did you participate in?*

# ACTIVITIES – SPORTS



Q: During this trip to Guam, which of the following activities did you participate in?

93
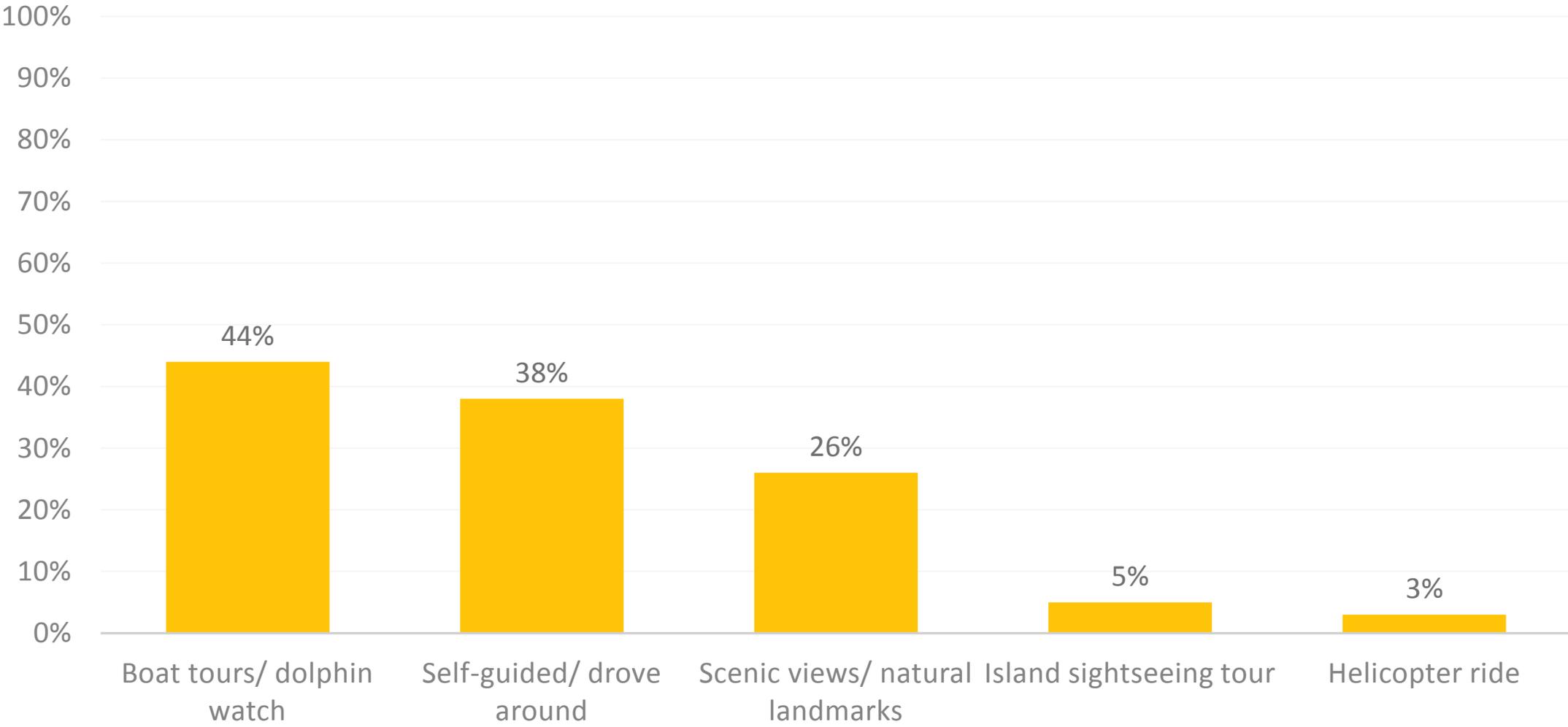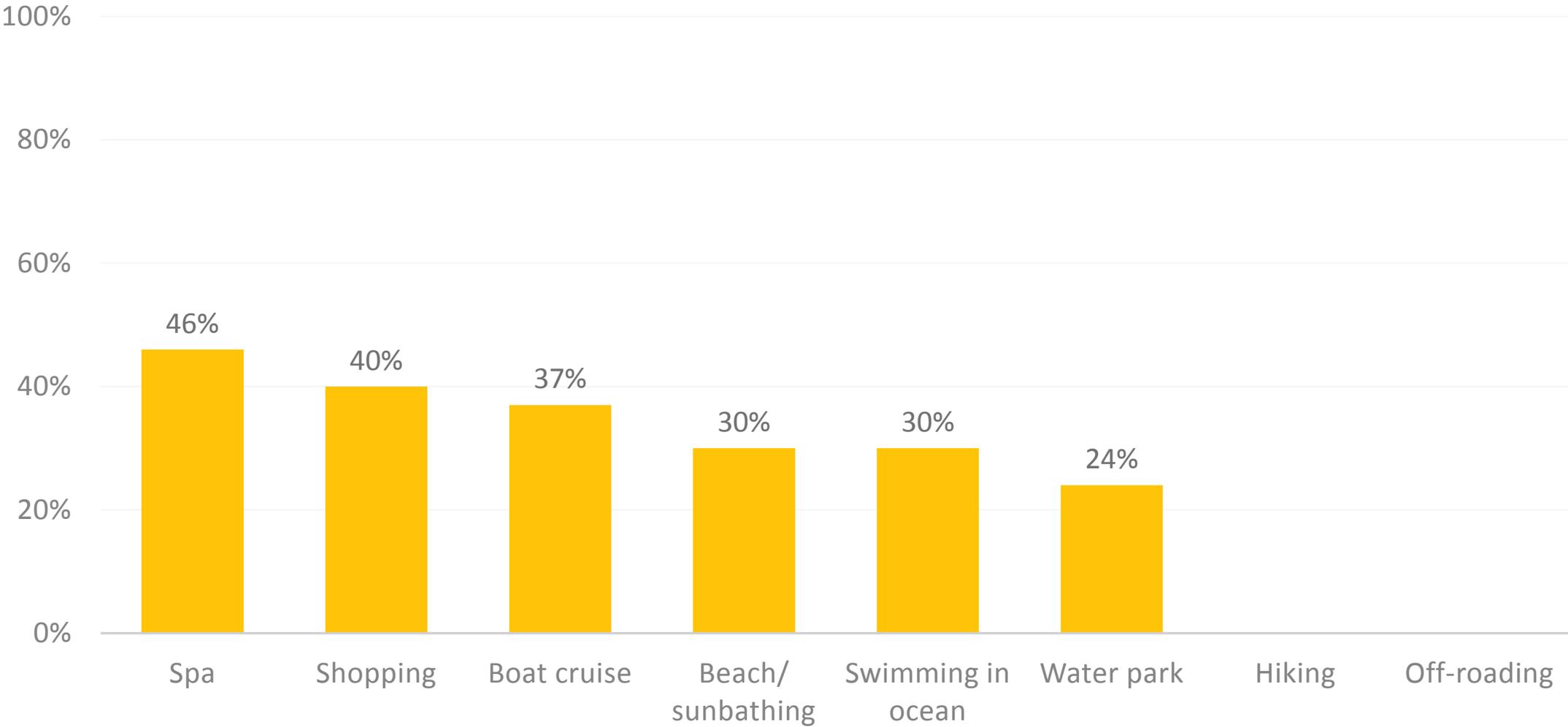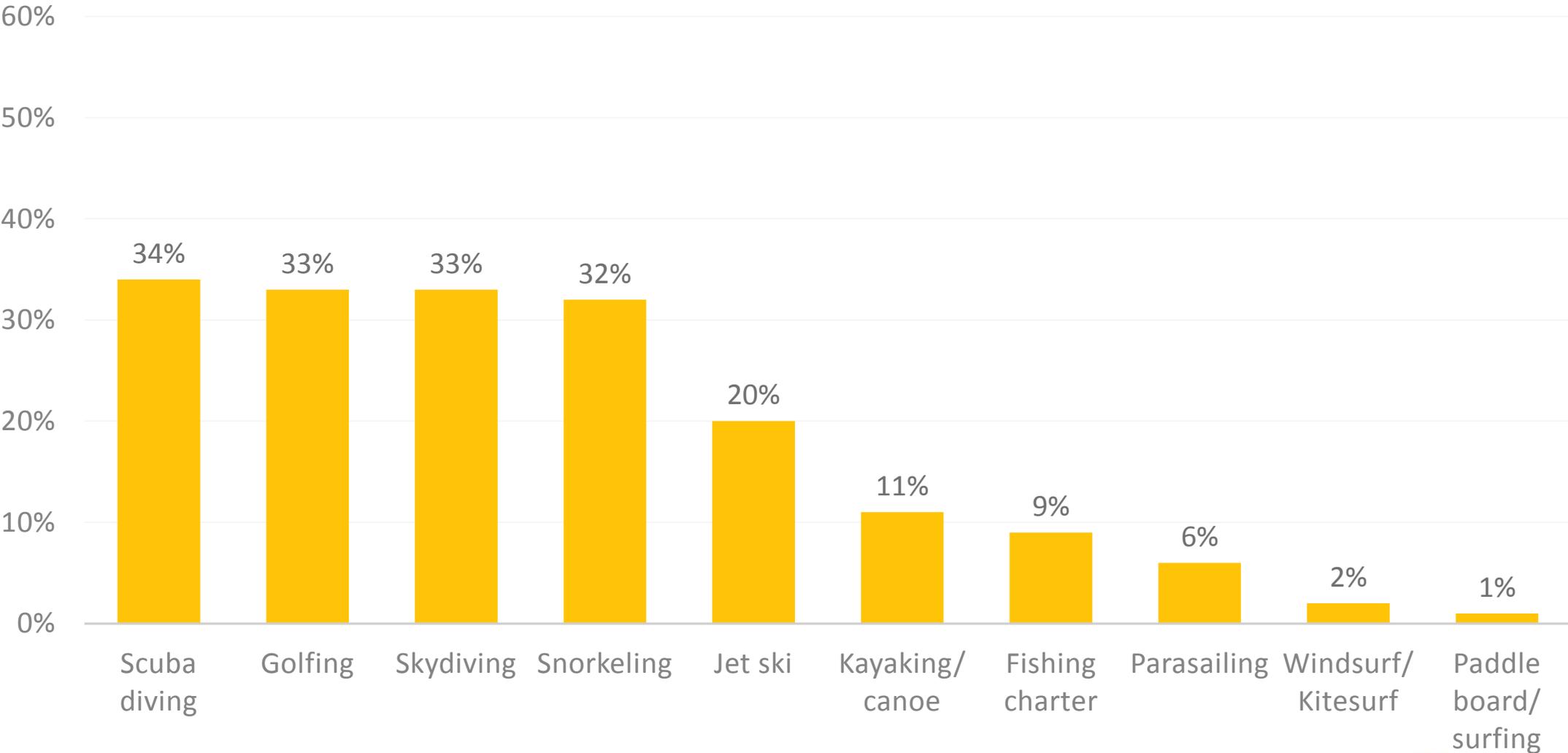
# ACTIVITIES – HISTORY, CULTURE, ARTS



*Q: During this trip to Guam, which of the following activities did you participate in?*

94
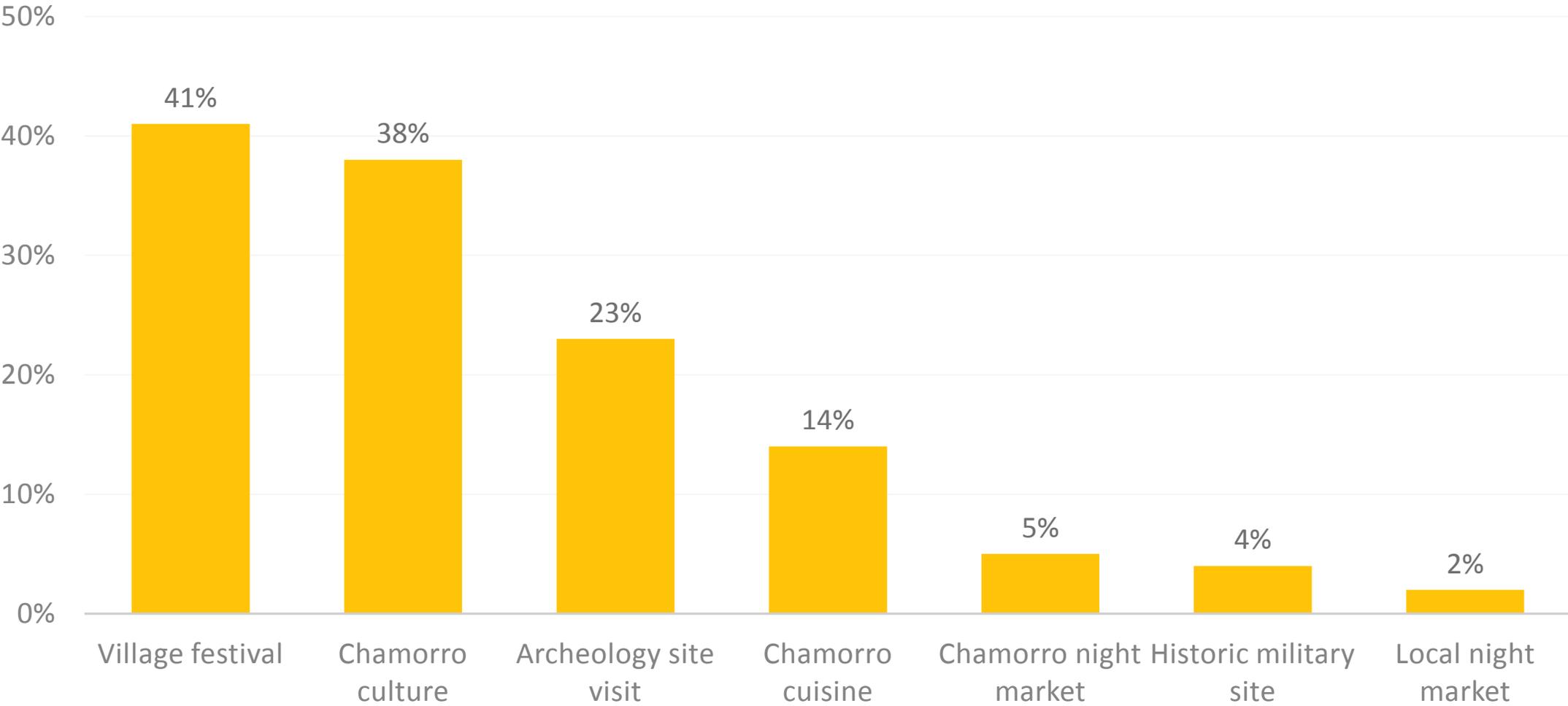
# ACTIVITIES – ENTERTAINMENT & DINING

*Q: During this trip to Guam, which of the following activities did you participate in?*
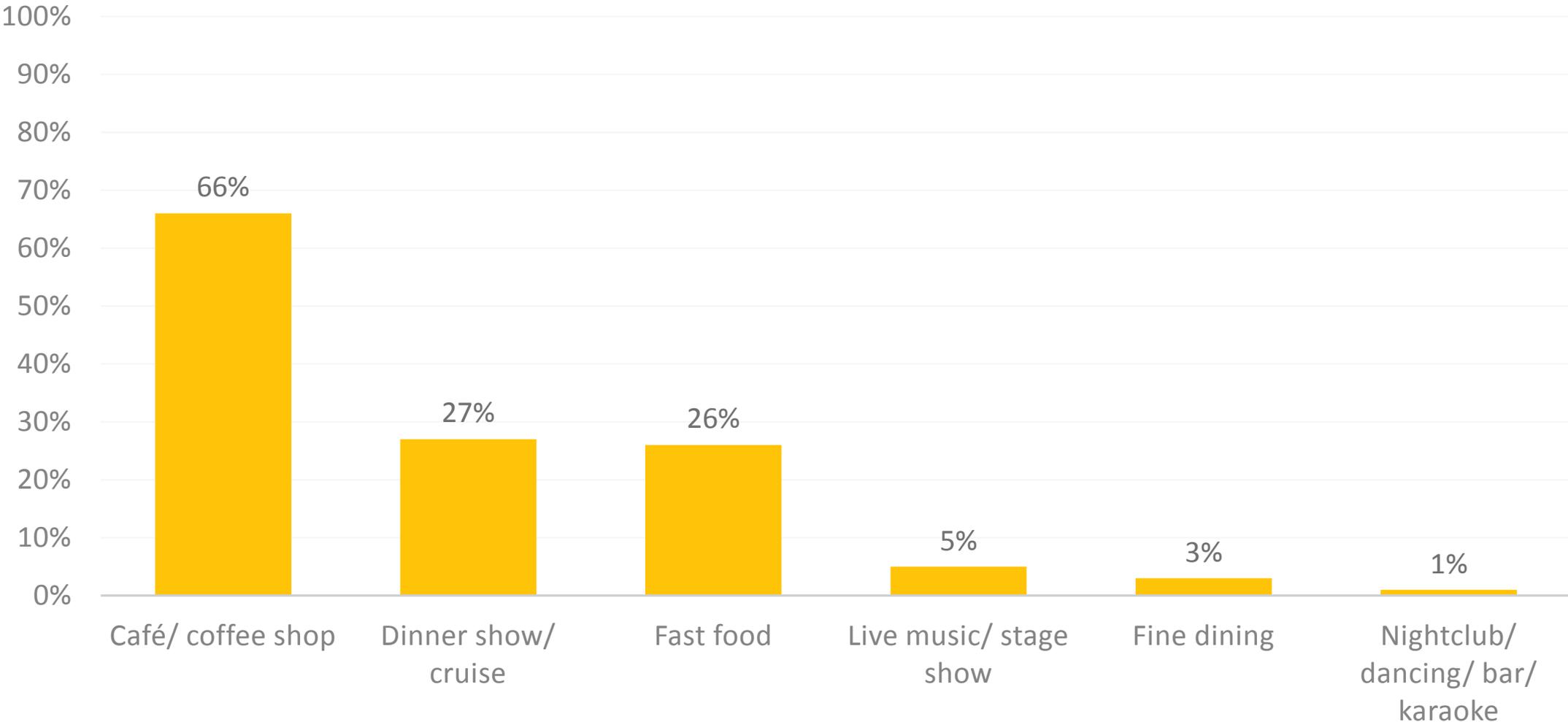
# LOCAL ATTRACTIONS – TOP RESPONSES (5%+)



Bar chart:

| Attraction | Percentage |
| --- | --- |
| Chamorro Night Mkt | 41% |
| Two Lovers Pt | 38% |
| Chamorro Village | 33% |
| Amot Tao Tao | 17% |
| Atlantis Sub | 15% |
| Guam Museum | 11% |
| Fish Eye Marine Park | 10% |
| Underwtr Wld | 9% |
| Sandcastle | 9% |
| Guam Seawalker | 8% |
| BIG | 8% |
| Tagada | 8% |
| Ride the duck tour | 5% |

*Q: During this trip to Guam, which of the following attractions did you visit?*
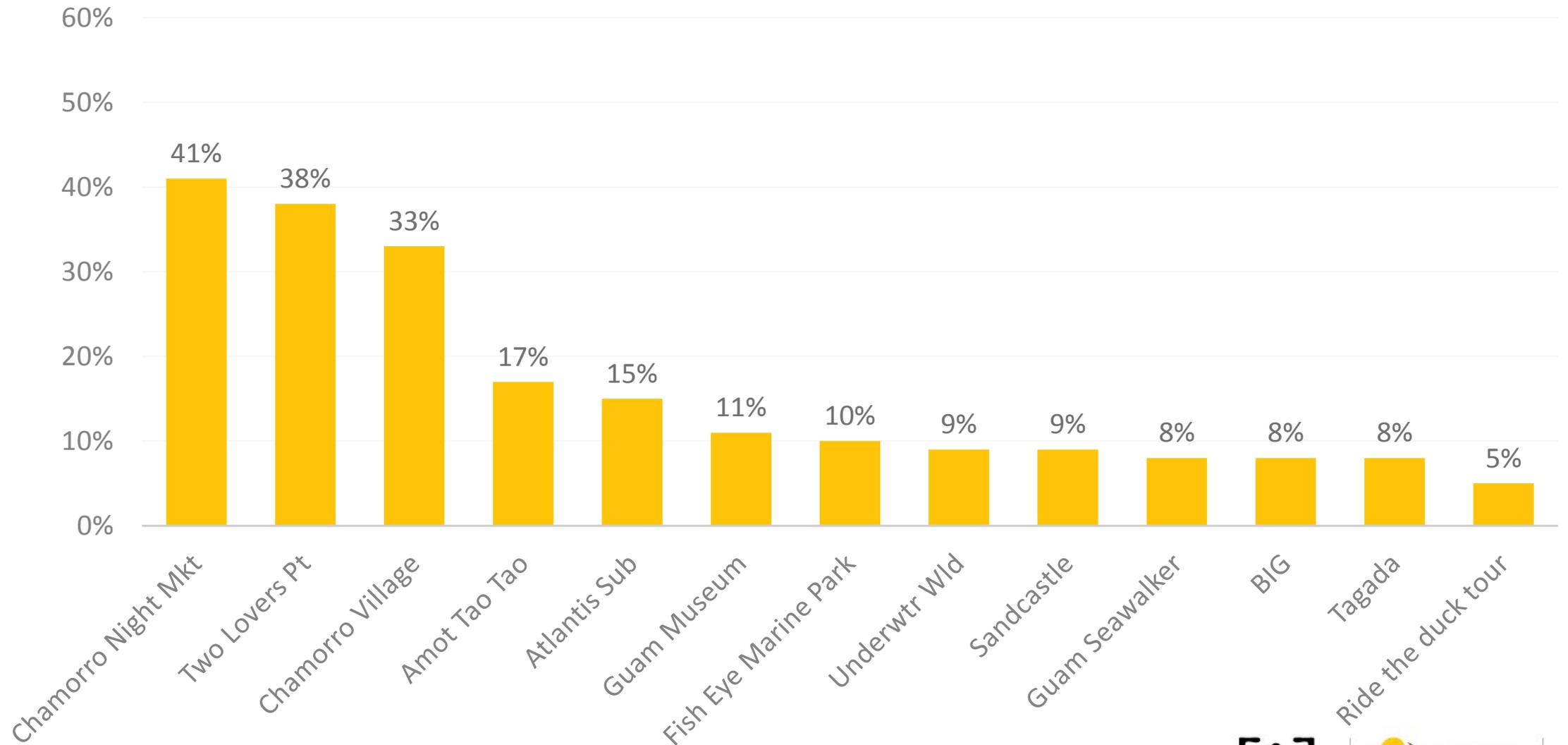
# LOCAL CULTURE – OBSTACLES
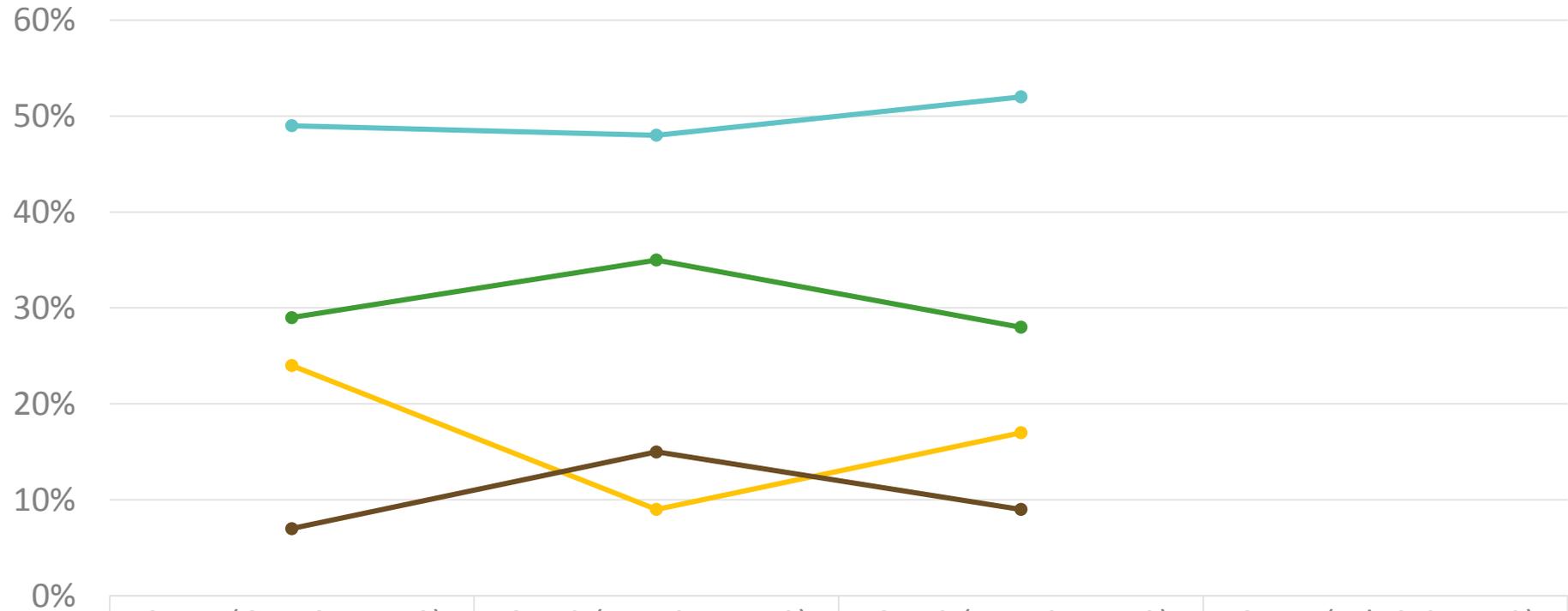


| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| Schedule | 49% | 48% | 52% | |
| Unaware | 24% | 9% | 17% | |
| Did not want to | 29% | 35% | 28% | |
| Did not know where | 7% | 15% | 9% | |

*Q: Why did you not participate in any cultural activities or events during your recent stay on Guam?*

SECTION 6
# SOURCES OF INFORMATION

# PRE-ARRIVAL SOURCES OF INFORMATION



Q: Please select the top three sources of information you used to find out about Guam before your trip
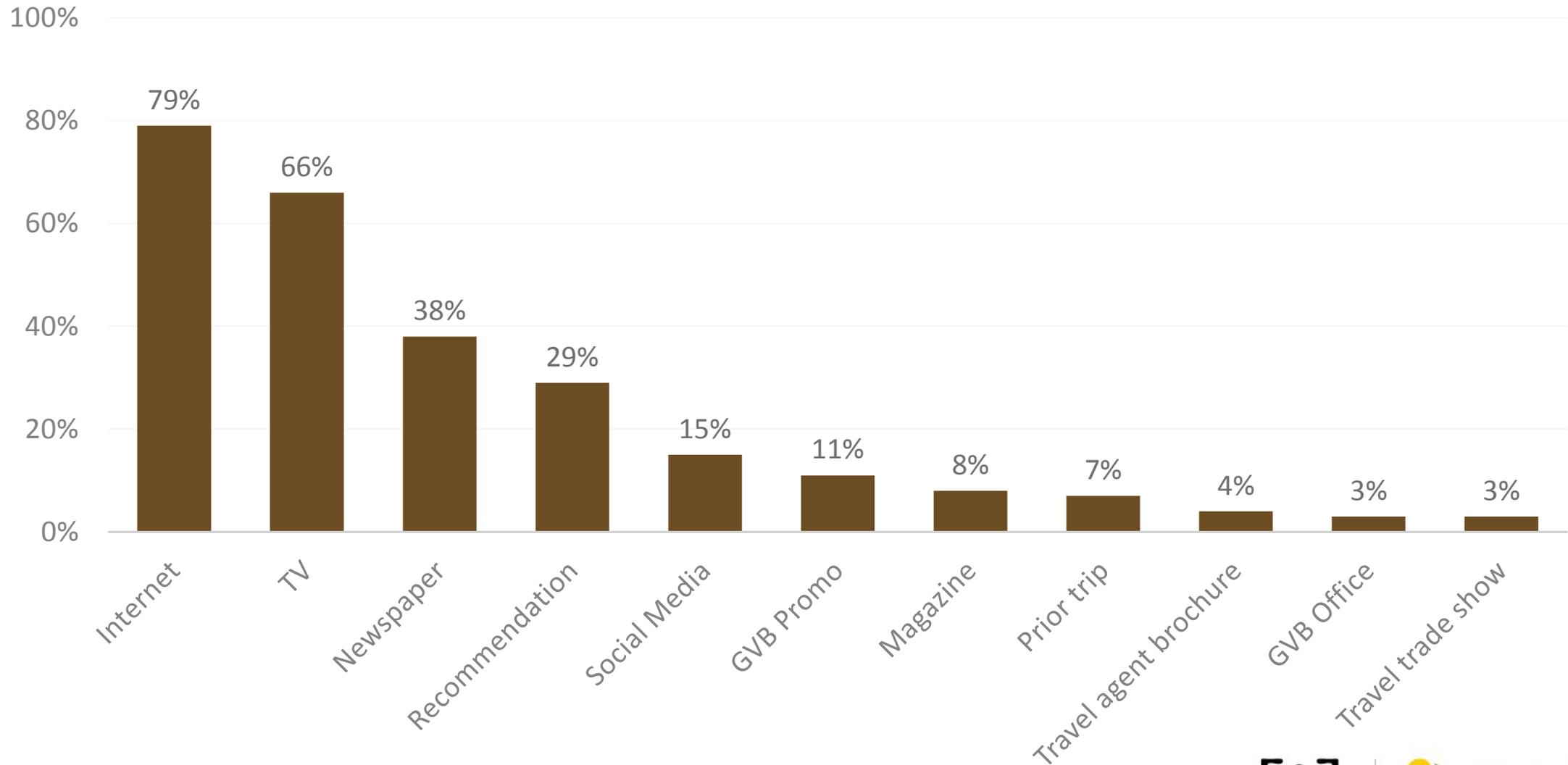
# PRE-ARRIVAL SOURCES OF INFORMATION - SEGMENTATION

**GVB VISITOR SATISFACTION STUDY**
**Q5  Please select the top three sources of information you used to find out about Guam before your trip**

|  |  | TOTAL | FAMILY | FIT | GROUP TOUR | MICE | HONEYMOON | WEDDING | REPEAT | LEISURE TRVL |
|---|---|---|---|---|---|---|---|---|---|---|
|  |  | - | - | - | - | - | - | - | - | - |
| Q5 | Internet/Mobile App | 79% | 78% | 82% | 55% | 83% | 80% | 72% | 80% | 78% |
|  | TV | 66% | 71% | 71% | 45% | 67% | 26% | 88% | 80% | 40% |
|  | Newspaper | 38% | 42% | 48% | 22% | 67% | 7% | 54% | 54% | 9% |
|  | Friend or relative | 29% | 23% | 19% | 35% | 17% | 52% | 9% | 10% | 51% |
|  | Social media | 15% | 13% | 14% | 24% |  | 28% | 6% | 6% | 28% |
|  | Guam Visitors Bureau promotional activities | 11% | 12% | 16% | 10% |  |  | 29% | 16% | 1% |
|  | Magazine (consumer) | 8% | 7% | 1% | 2% |  | 9% |  | 2% | 15% |
|  | I have been to Guam before | 7% | 7% | 6% | 10% |  | 4% | 6% | 17% | 10% |
|  | Travel agent brochure | 4% | 5% | 1% | 12% |  | 17% |  | 1% | 8% |
|  | Co-worker/ company travel department | 4% | 3% | 3% | 16% | 17% | 2% | 1% | 1% | 7% |
|  | Consumer travel shows | 3% | 4% | 5% |  |  |  | 9% | 5% | 0% |
|  | Guam Visitors Bureau office | 3% | 2% | 3% |  | 17% |  | 4% | 3% | 1% |
|  | Travel trade shows | 3% | 3% | 4% |  |  |  | 4% | 4% |  |
|  | Travel guide book at bookstores | 2% | 2% | 1% |  |  | 4% | 1% | 1% | 4% |
|  | Radio | 0% | 1% | 0% |  |  |  |  |  | 1% |
|  | Theater ads | 0% | 1% | 1% |  |  |  |  | 1% |  |
|  | Total | 1086 | 972 | 739 | 49 | 6 | 46 | 68 | 448 | 540 |

*Prepared by Anthology Research*

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

# ONISLE SOURCES OF INFORMATION



Q: *Please select the top three sources of information you used to find out about Guam while you were here*
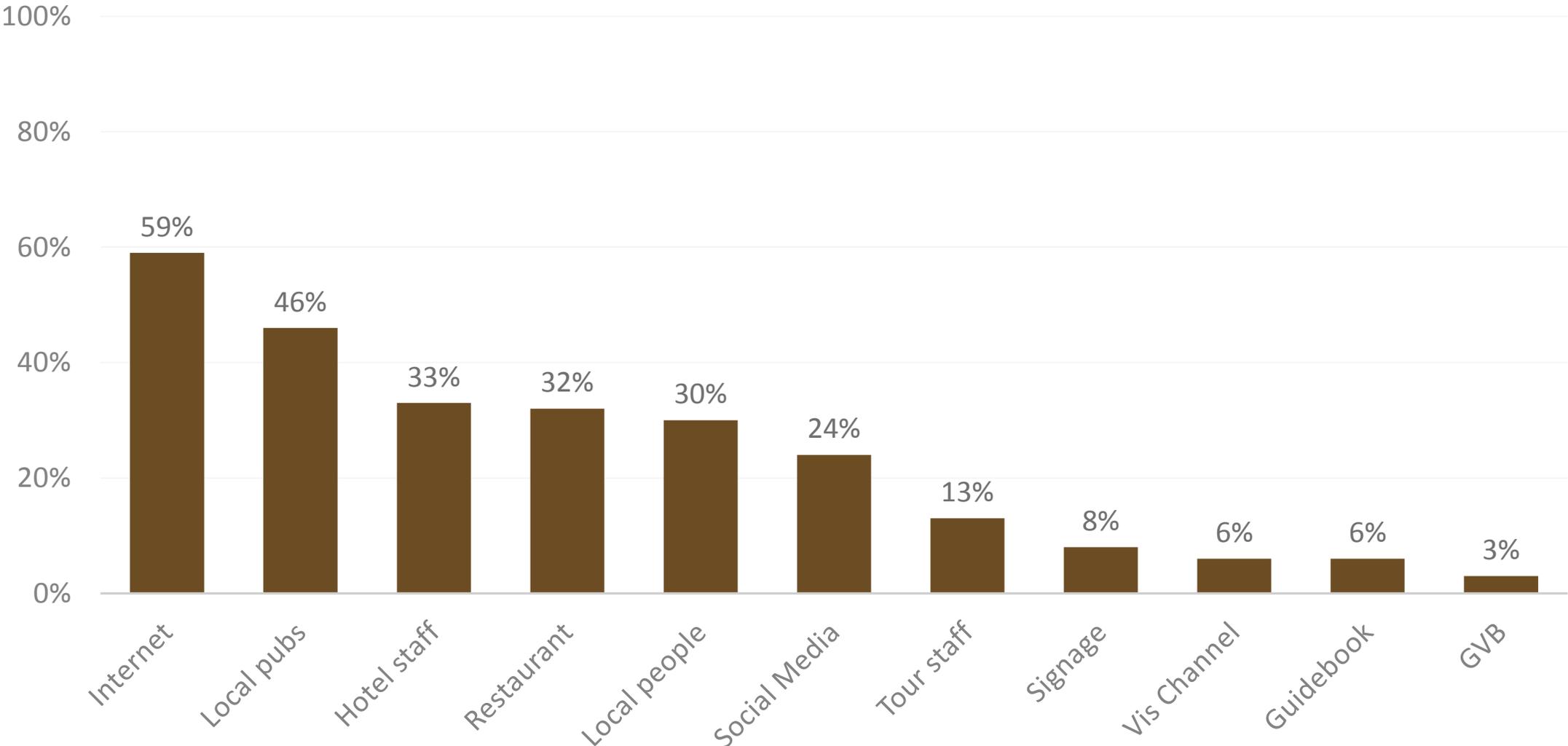
**GVB VISITOR SATISFACTION STUDY**
**Q6  Please select the top three sources of information you used to find out about Guam while you were here**

| | | TOTAL | FAMILY | FIT | GROUP TOUR | MICE | HONEYMOON | WEDDING | REPEAT | LEISURE TRVL |
|---|---|---|---|---|---|---|---|---|---|---|
| | | - | - | - | - | - | - | - | - | - |
| Q6 | Internet/ Mobile App | 59% | 56% | 56% | 45% | 33% | 85% | 46% | 47% | 73% |
| | Local publication | 46% | 49% | 56% | 35% | 33% | 13% | 76% | 61% | 19% |
| | Hotel staff | 33% | 32% | 29% | 24% | 17% | 28% | 19% | 33% | 36% |
| | Restaurant staff (outside hotel) | 32% | 34% | 40% | 16% | 33% | 9% | 62% | 46% | 11% |
| | Local people | 30% | 32% | 37% | 27% | 33% | 7% | 50% | 46% | 11% |
| | Social Media | 24% | 22% | 24% | 27% | 17% | 41% | 18% | 13% | 36% |
| | Tour staff | 13% | 14% | 1% | 31% | 17% | 33% | 1% | 3% | 25% |
| | Signs/ advertisement | 8% | 8% | 4% | 4% | | 9% | 4% | 5% | 13% |
| | Guide books I brought with me | 6% | 6% | 5% | 6% | | 11% | 3% | 5% | 10% |
| | Visitors channel | 6% | 6% | 7% | 8% | 17% | | 3% | 7% | 3% |
| | Retail staff | 5% | 5% | 4% | 4% | 33% | 4% | 3% | 5% | 4% |
| | Other visitors | 3% | 4% | 4% | 2% | | 7% | 4% | 3% | 4% |
| | Taxi drivers | 3% | 3% | 3% | 6% | | 4% | 1% | 2% | 5% |
| | Guam Visitors Bureau | 3% | 3% | 3% | | | 2% | | 3% | 4% |
| | Total | 1086 | 972 | 739 | 49 | 6 | 46 | 68 | 448 | 540 |

*Prepared by Anthology Research*

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

# ONLINE SOURCES OF INFORMATION

*Q: Which internet or social media sources, if any, did you use to learn about Guam?*
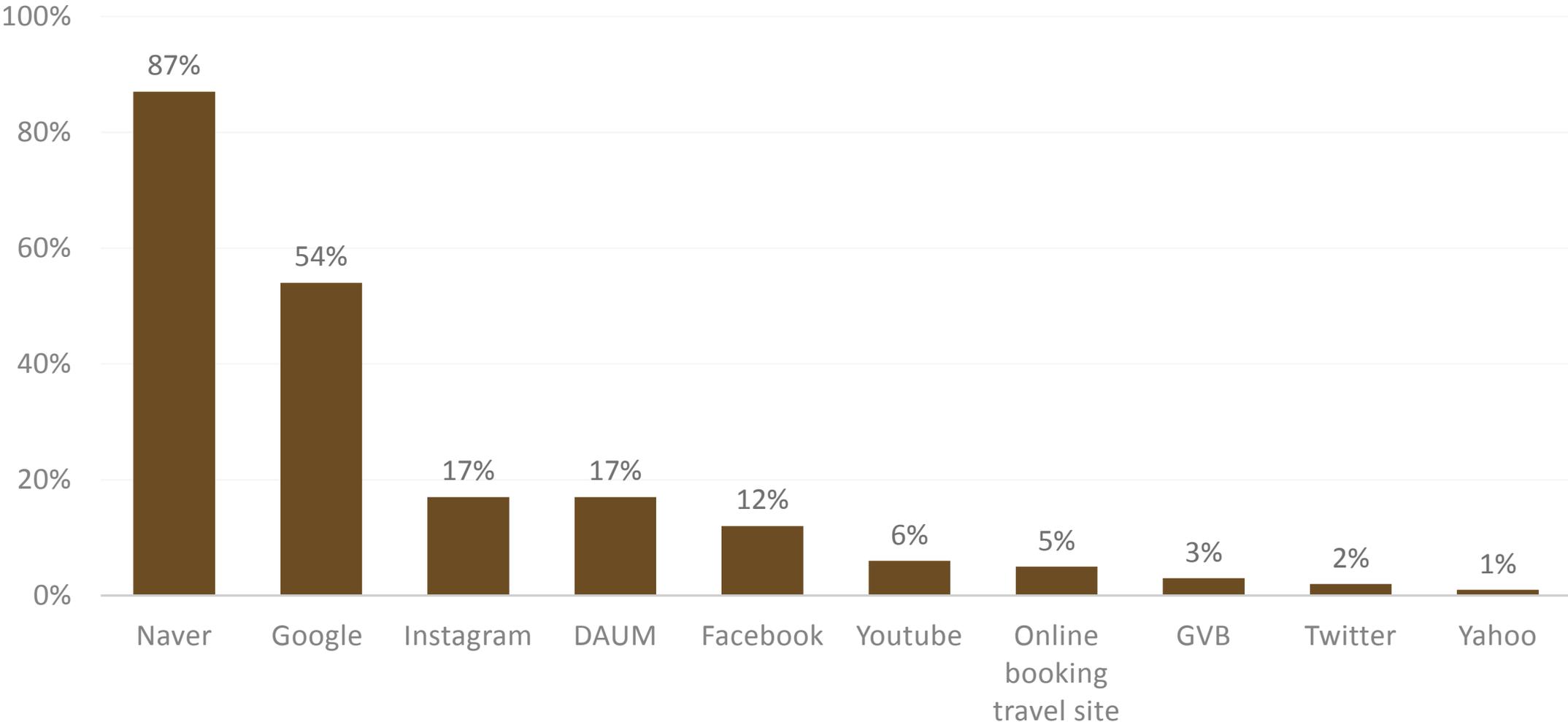
# ONLINE SOURCES OF INFORMATION
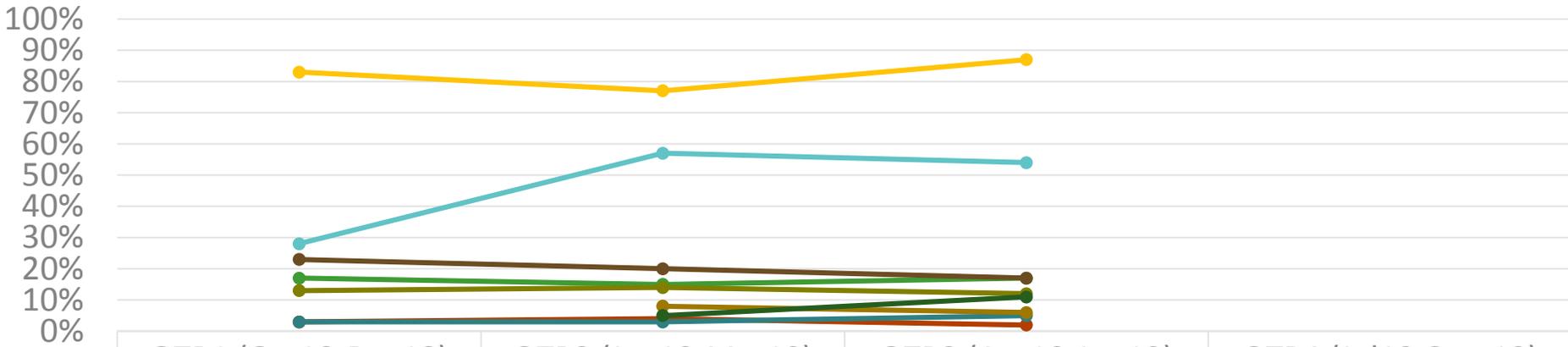
| | QTR1 (Oct18-Dec18) | QTR2 (Jan19-Mar19) | QTR3 (Apr19-Jun19) | QTR4 (Jul19-Sept19) |
|---|---|---|---|---|
| Google | 28% | 57% | 54% | |
| Naver | 83% | 77% | 87% | |
| DAUM | 17% | 15% | 17% | |
| Instagram | 23% | 20% | 17% | |
| Facebook | 13% | 14% | 12% | |
| Twitter | 3% | 4% | 2% | |
| Online booking site | 3% | 3% | 5% | |
| Youtube | | 8% | 6% | |
| GVB | | 5% | 11% | |

*Q: Which internet or social media sources, if any, did you use to learn about Guam?*

SECTION 7

# IMMIGRATION

# IMPACT OF AIRPORT IMMIGRATION SVC ON FUTURE TRAVEL TO GUAM



66%    63%    79%

QTR1 (Oct18-Dec18)    QTR2 (Jan19-Mar19)    QTR3 (Apr19-Jun19)    QTR4 (Jul19-Sept19)

—●— Immigration Will Impact Future Travel To Guam

106    *Q: Do you think the security screening and/or immigration process here at the Guam International Airport will affect your decisions to visit Guam again in the future?*
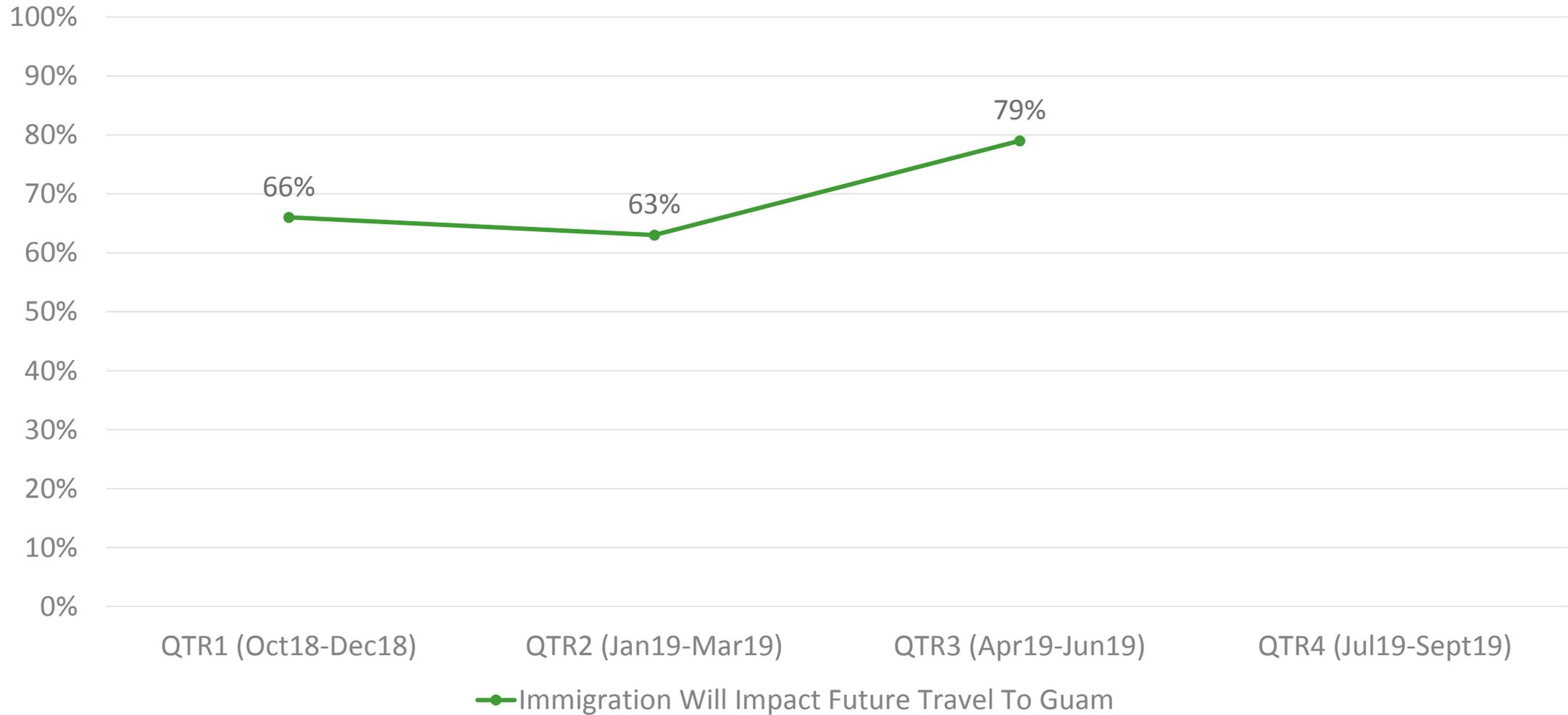
# AIRPORT – SECURITY/ IMMIGRATION ISSUES
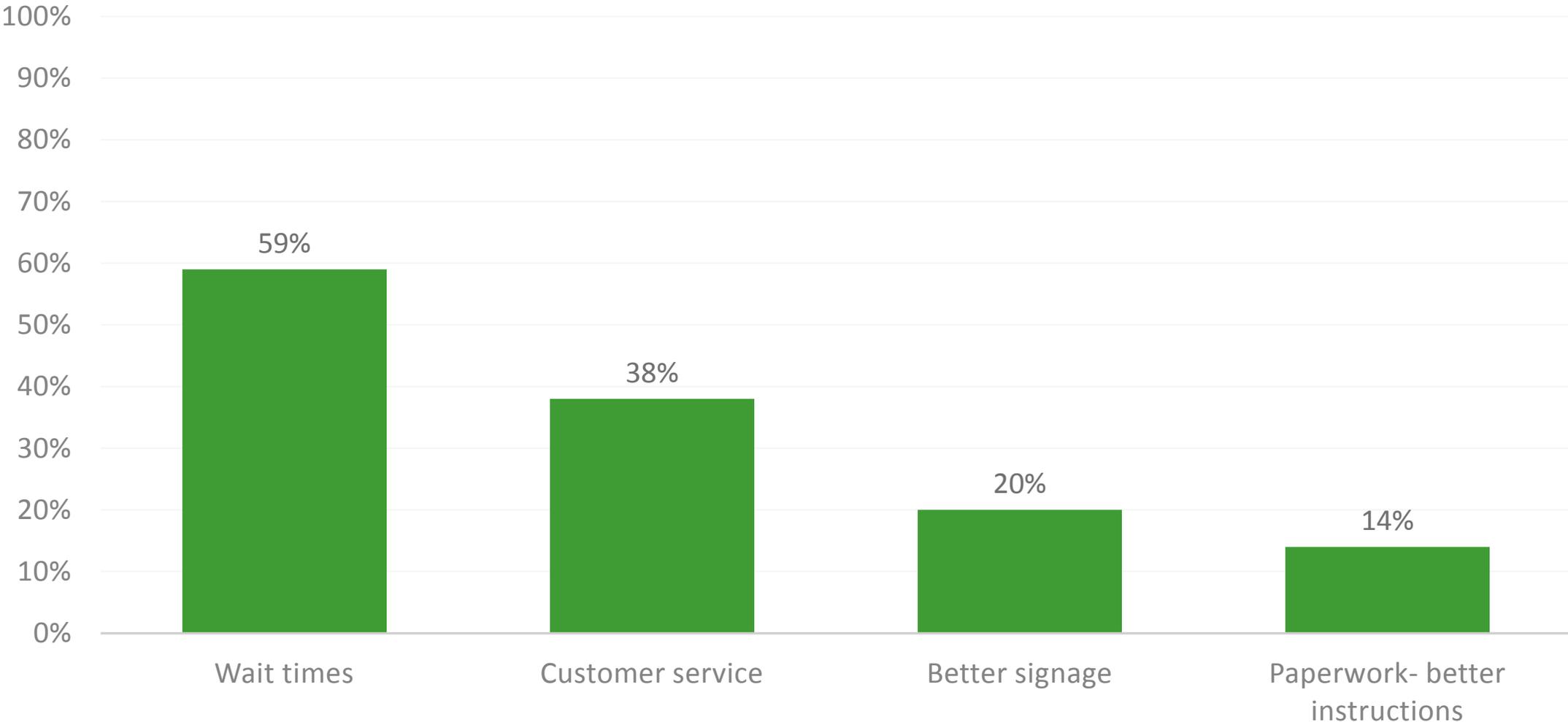


Q: What about the security screening and/ or immigration process here at the Guam International Airport could be improved?

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, 2-3 Qtr. 2019 | | | |
|---|---|---|---|
| | 2nd Qtr. 2019 | **3rd Qtr. 2019** | Combined 2-3 Qtr. 2019 |
| Drivers: | rank | **rank** | rank |
| Entertainment | 1 | **1** | 1 |
| Shopping | 4 | | 4 |
| Dining | | | |
| Beaches | 5 | **3** | |
| Parks | 2 | **2** | 2 |
| Roads | | **5** | |
| Sightseeing Areas | 3 | | 5 |
| Being a safe and secure destination | | **4** | 3 |
| % of Overall Satisfaction Accounted For | 33.9% | **33.5%** | 32.9% |
| NOTE: Only significant drivers are included. | | | |

# DRIVERS – OVERALL SATISFACTION

- **Overall satisfaction** with the Korea visitor's experience on Guam is driven by five significant factors in the 3$^{rd}$ Quarter 2019 Period. By rank order they are:
  - **Entertainment,**
  - **Parks,**
  - **Beaches,**
  - **Being a safe & secure destination, and**
  - **Roads**
- With these factors the overall r$^2$ is .335 meaning that **33.5% of overall satisfaction is accounted for by these factors.**

# DRIVERS – ONISLE EXPENDITURES

| Comparison of Drivers of Per Person On Island Expenditures, 2-3 Qtr. 2019 | | | |
|---|---|---|---|
| | 2nd Qtr 2019 | **3rd Qtr. 2019** | Combined 2-3 Qtr. 2019 |
| Drivers: | rank | **rank** | rank |
| Entertainment | 3 | **2** | 2 |
| Shopping | 1 | **1** | 1 |
| Dining | | | |
| Beaches | | | |
| Parks | 2 | | |
| Roads | | | |
| Sightseeing Areas | | | |
| Being a safe and secure destination | | | |
| % of Overall Satisfaction Accounted For | 6.8% | **11.0%** | 12.1% |
| NOTE: Only significant drivers are included. | | | |

# DRIVERS – ONISLE EXPENDITURES

- **Per Person On Island Expenditure** of Korea visitors on Guam is driven by two significant factors in the 3rd Quarter 2019 Period.  By rank order they are:
  - **Shopping, and**
  - **Entertainment**
- With these factors the overall $r^2$ is .110 meaning that **11.0% of per person on island expenditure is accounted for by these factors.**