Guam Visitors Bureau

Korean Visitor Tracker Exit Profile & Market Segmentation Report

FY2018

QTR.4 (JUL-SEPT 2018)

Prepared by: Anthology Research

#instaGuam

[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 **1,055** 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 **1,055** is +/- 3.0 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 +/- 3.0 percentage points.

[A]

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.

[A]

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

[A]

Key Highlighted Segments
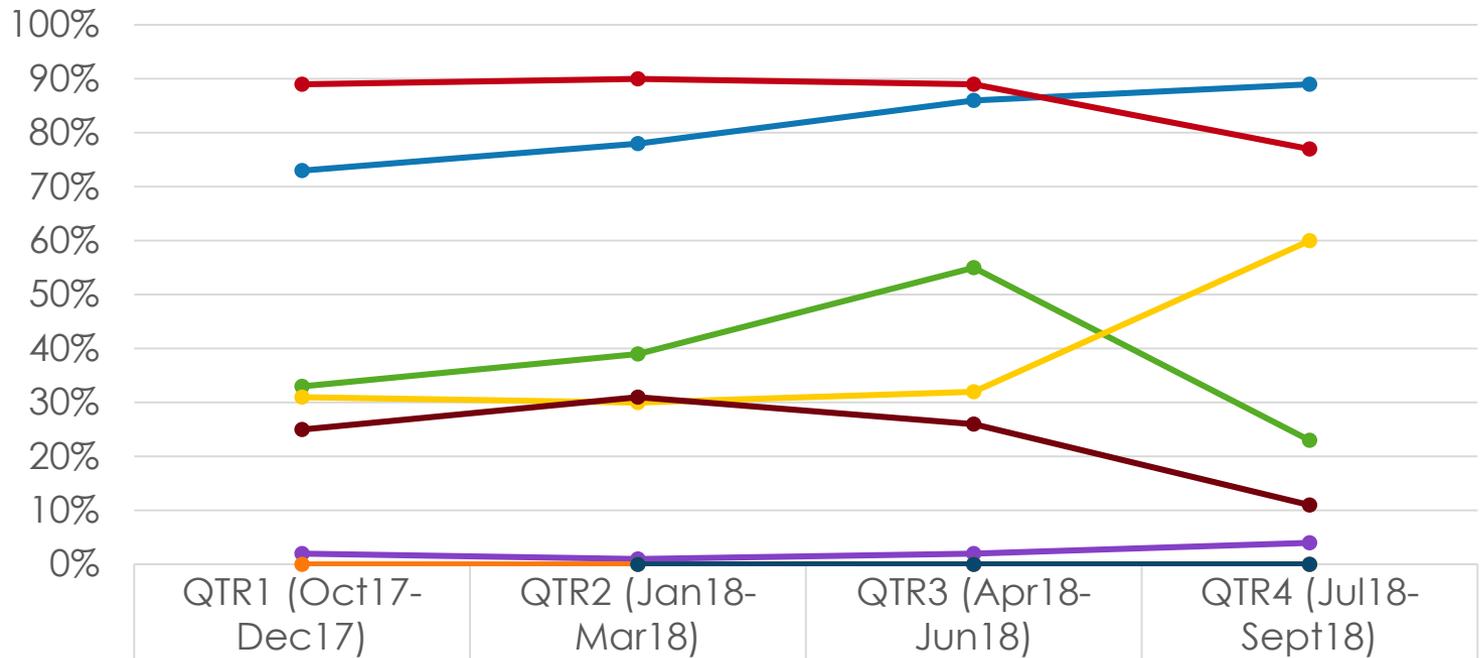
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
Leisure Traveler	73%	78%	86%	89%
Family	89%	90%	89%	77%
Repeat	33%	39%	55%	23%
FIT	31%	30%	32%	60%
Honeymoon	2%	1%	2%	4%
MICE	0%	0%	0%	0%
Wedding		0%	0%	0%
Group	25%	31%	26%	11%

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SECTION 1
PROFILE OF RESPONDENTS

Marital Status

[A]
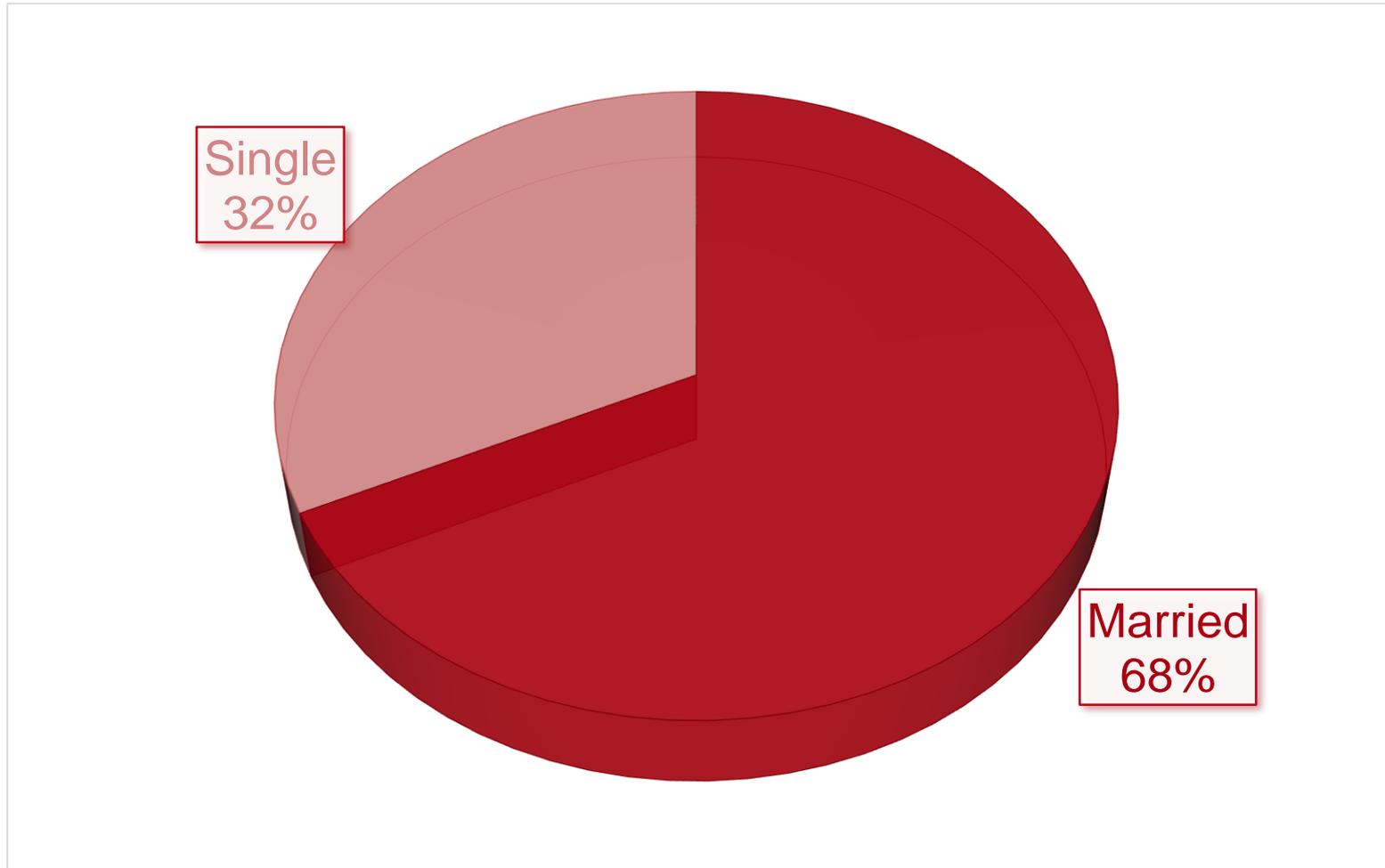
Marital status – FY2018 Tracking

Chart showing marital status tracking with two lines:

Married (blue line):
- QTR1 (Oct17-Dec17): 74%
- QTR2 (Jan18-Mar18): 62%
- QTR3 (Apr18-Jun18): 73%
- QTR4 (Jul18-Sept18): 68%
- YTD: 69%

Single (red line):
- QTR1 (Oct17-Dec17): 26%
- QTR2 (Jan18-Mar18): 38%
- QTR3 (Apr18-Jun18): 27%
- QTR4 (Jul18-Sept18): 32%
- YTD: 31%

[A]
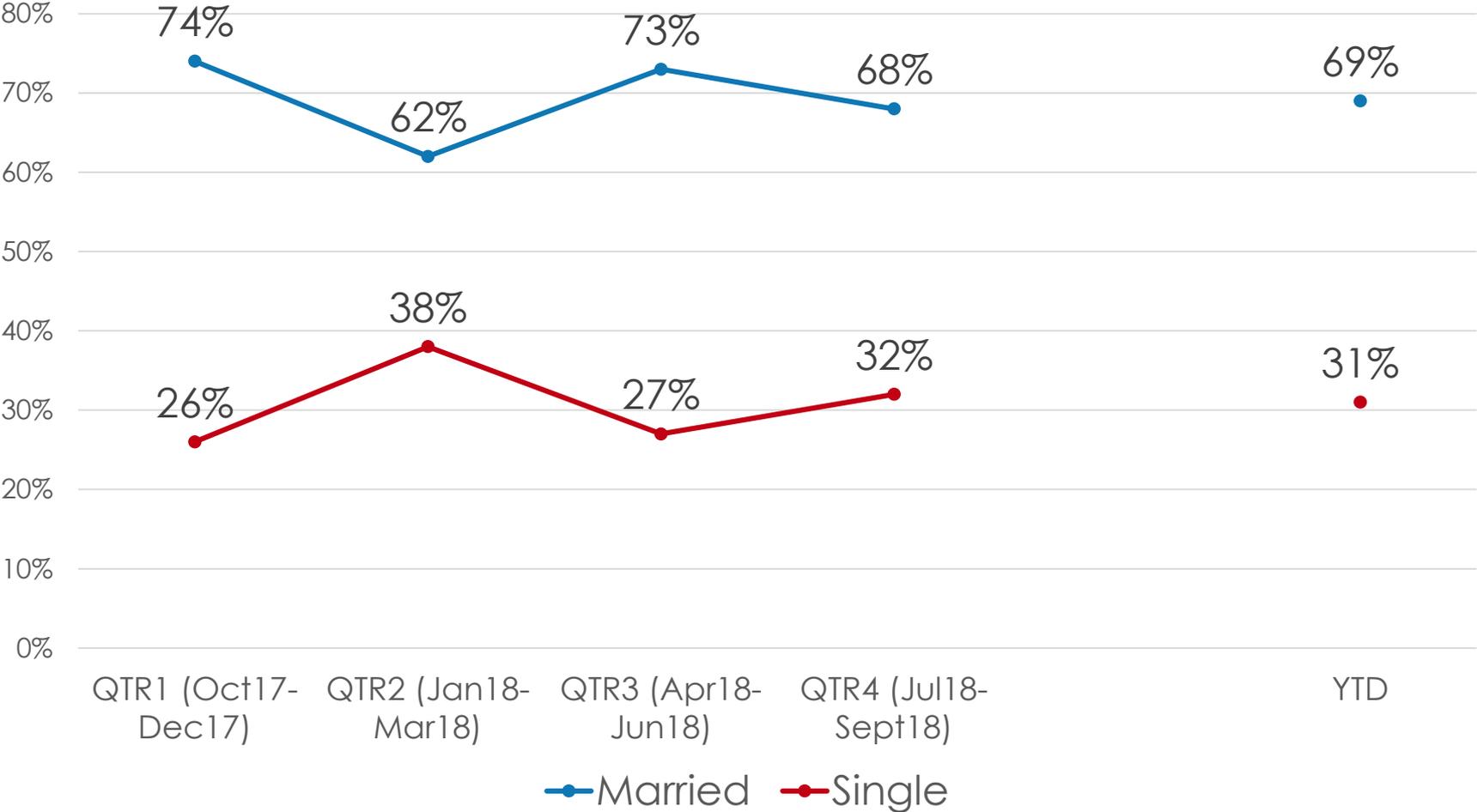
Marital status – Key Segments

GVB EXIT SURVEY
QE MARITAL STATUS

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
QE	Married	68%		95%	75%	68%	64%	80%	85%	62%
	Single	32%	100%	5%	25%	32%	36%	20%	15%	38%
	Total	1055	1	38	4	935	119	238	817	635

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[A]
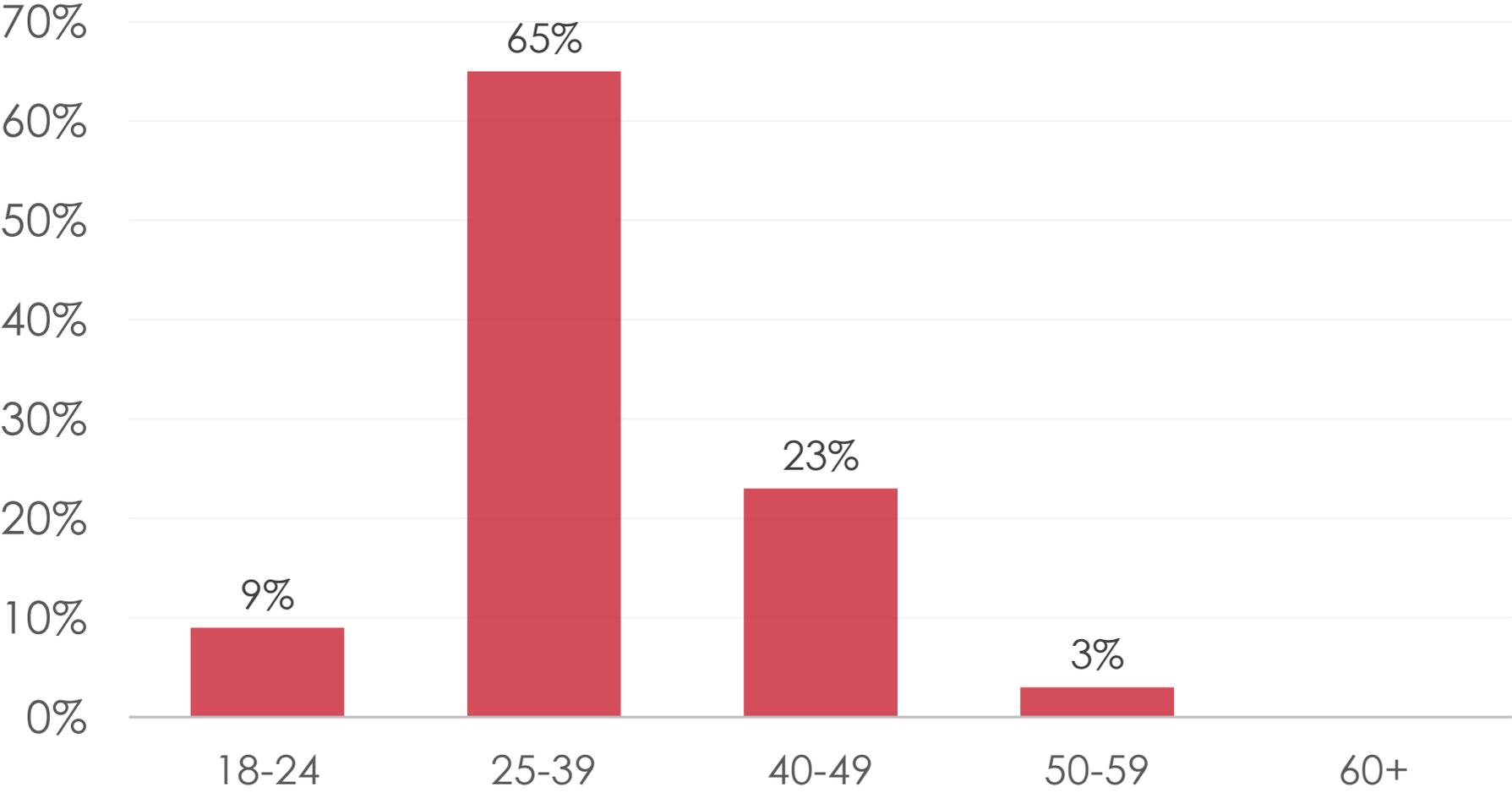
Age – FY2018 Tracking
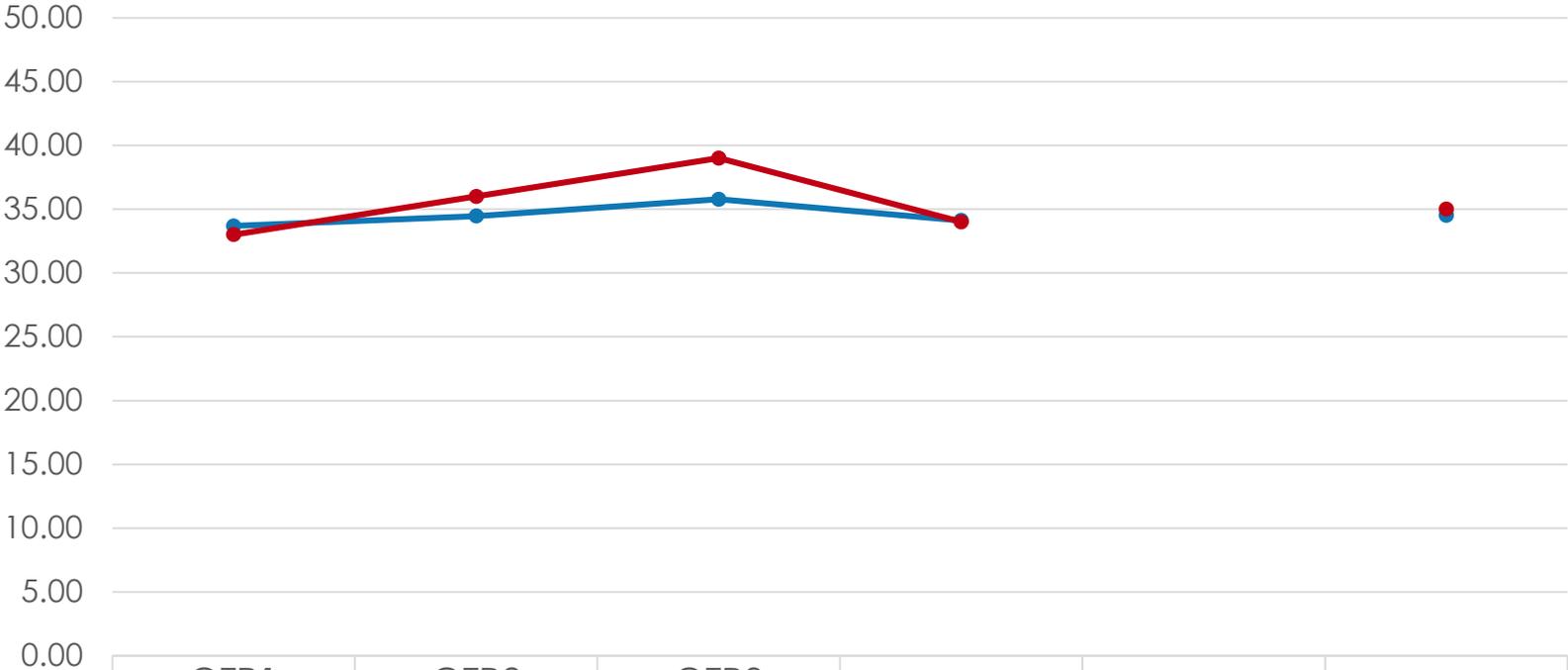
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	33.68	34.46	35.77	34.11		34.51
MEDIAN	33	36	39	34		35

[A]

Age – Key Segments

GVB EXIT SURVEY
AGE

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
SD	18-24	9%	100%	8%	50%	10%	10%	5%	6%	11%
	25-39	65%		87%	50%	64%	57%	58%	63%	70%
	40-49	23%		5%		23%	29%	33%	28%	17%
	50-59	3%				3%	4%	4%	3%	2%
	Total	1055	1	38	4	935	119	238	817	635
SD	Mean	34.11	24.00	30.79	24.75	34.25	34.72	36.47	35.74	32.71
	Median	34	24	30	26	34	35	37	36	32

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Annual Household Income
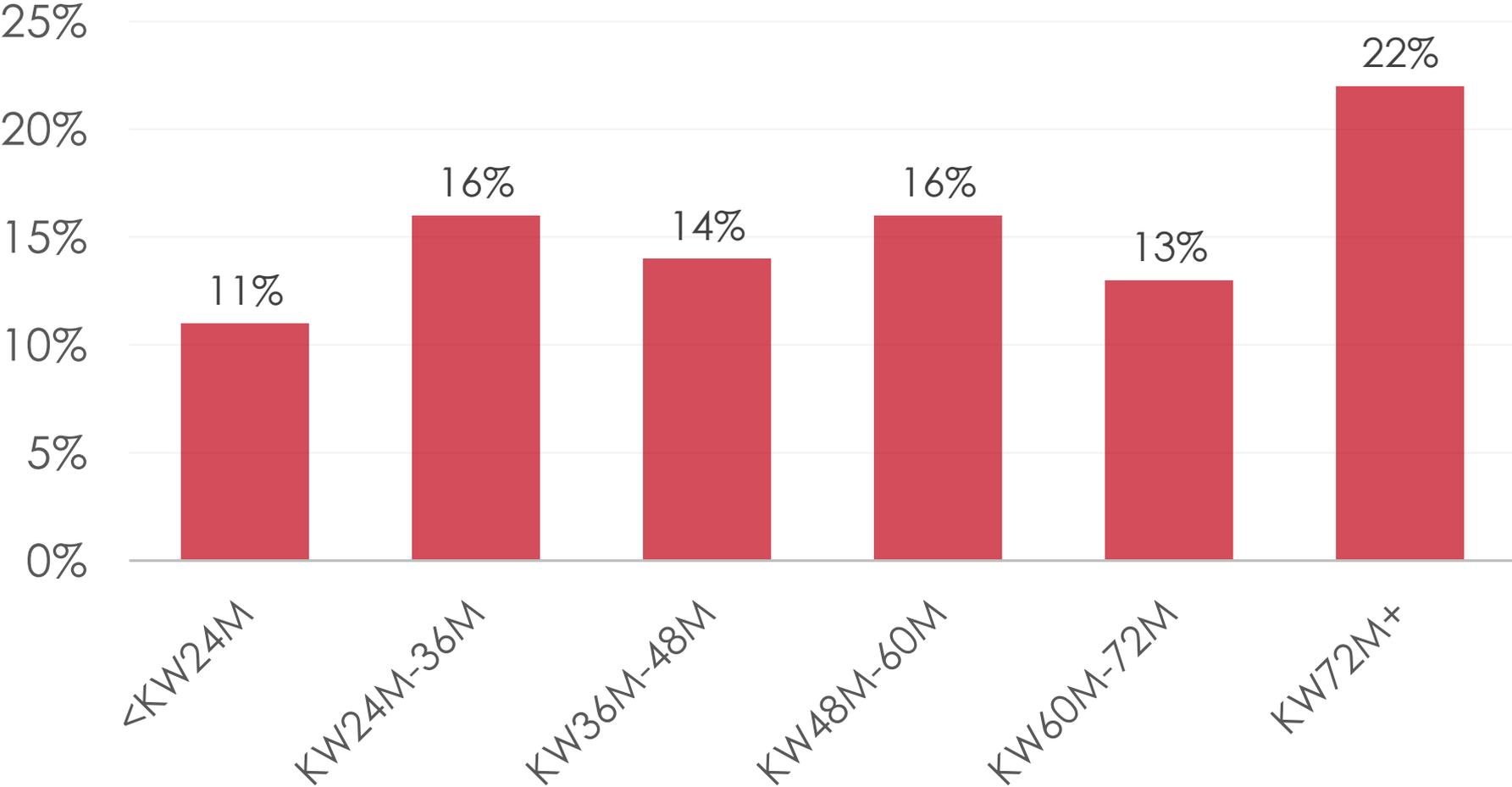
Annual Household Income – Key Segments

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
Q26	Up to KW12,000,000	4%		3%		4%	5%	3%	2%	4%
	KW12,000,001 ~ KW24,000,000	7%		14%		6%	8%	2%	4%	6%
	KW24,000,001 ~ KW36,000,000	16%	100%	27%	33%	16%	17%	12%	13%	18%
	KW36,000,001 ~ KW48,000,000	14%		22%		14%	17%	15%	15%	15%
	KW48,000,001 ~ KW60,000,000	16%		19%		17%	18%	16%	19%	15%
	KW60,000,001 ~ KW72,000,000	13%		3%	33%	13%	9%	16%	15%	12%
	More than KW72,000,001	22%		5%		22%	21%	30%	26%	23%
	No Income	7%		8%	33%	8%	5%	7%	6%	8%
	Total	1038	1	37	3	920	115	232	806	623

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Travel Party

Category	Percentage
Spouse	57%
Child <18	32%
Other Adult family	25%
Friend/ Assoc	14%
Girlfriend/ Boyfriend	9%
Child- adult	2%
Officemate	1%
Alone	1%

[A]
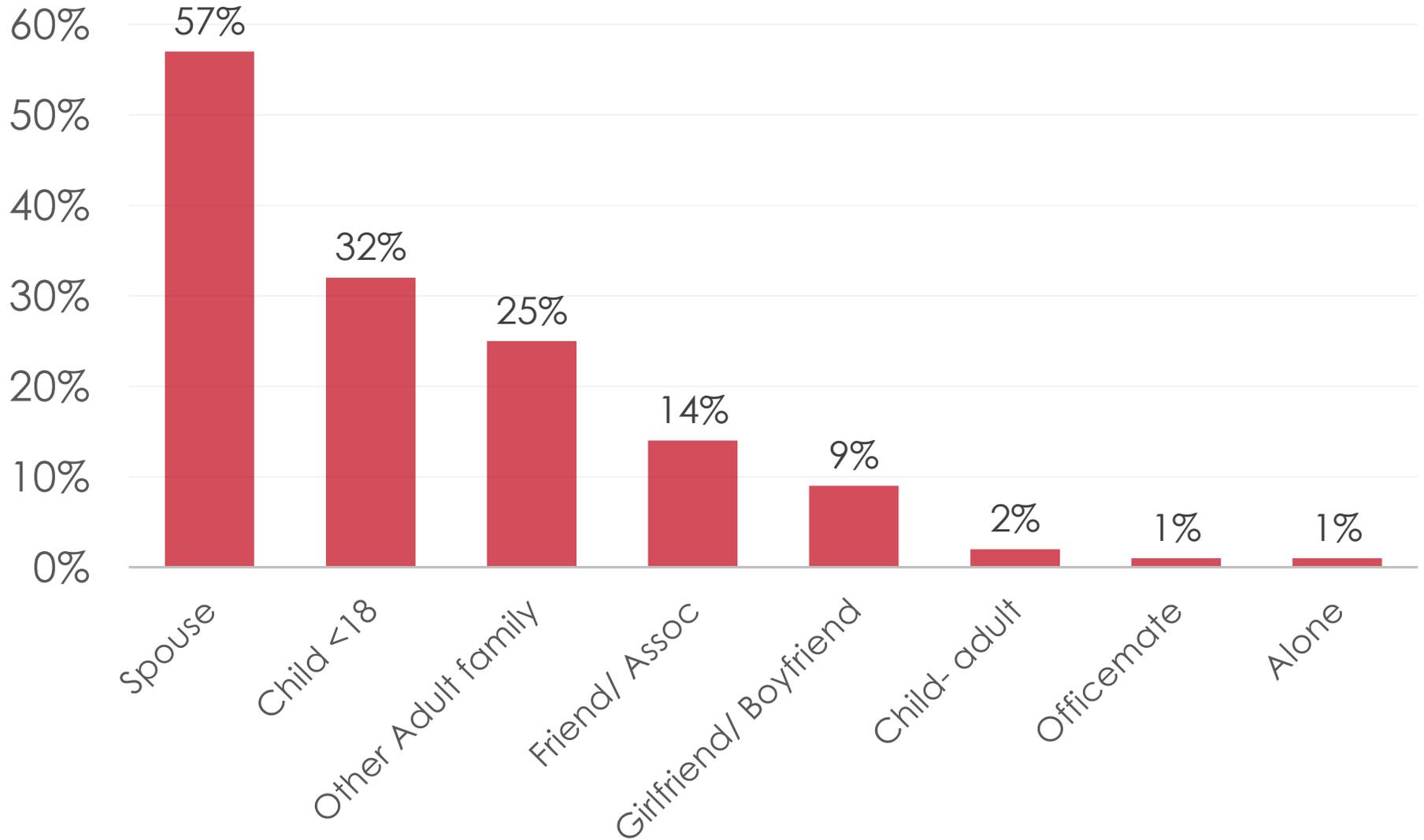
Travel Party
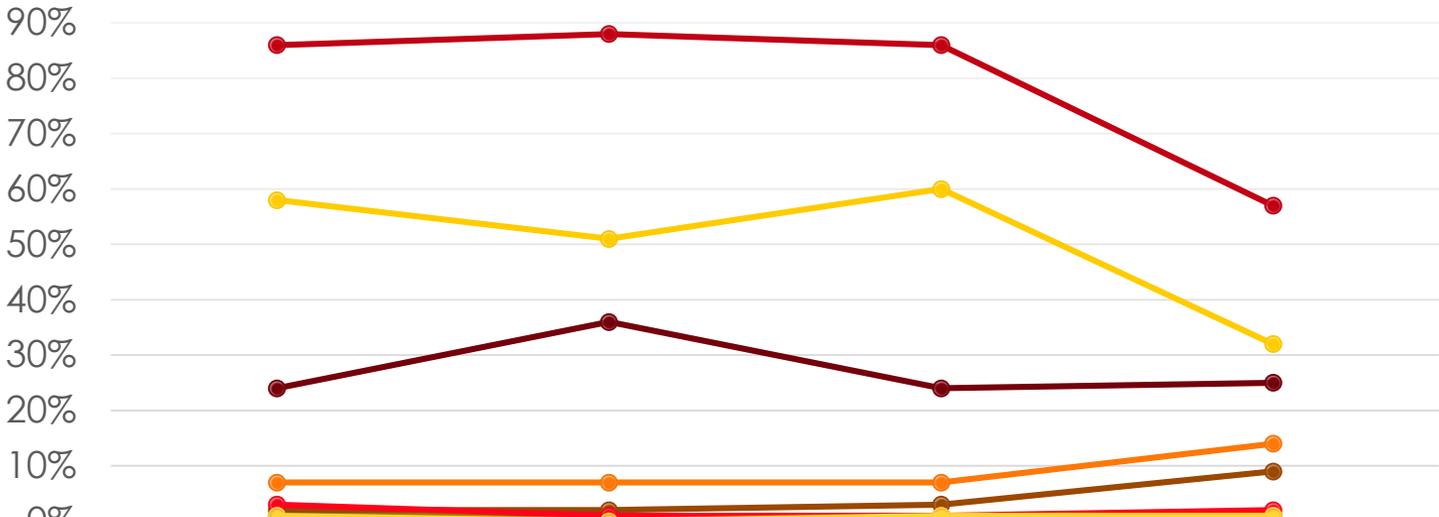
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
Spouse	86%	88%	86%	57%
Child <18	58%	51%	60%	32%
Friend/ Assoc	7%	7%	7%	14%
Other Adult Family	24%	36%	24%	25%
Alone	1%	1%	0%	1%
Girlfriend/ Boyfriend	2%	2%	3%	9%
Child- Adult	3%	1%	1%	2%
Office	1%	0%	1%	1%

[A]

Travel Party - Children

32% TRAVELING WITH A CHILD

[A]

Trips to Guam

Repeat
23%

First time
77%

[A]
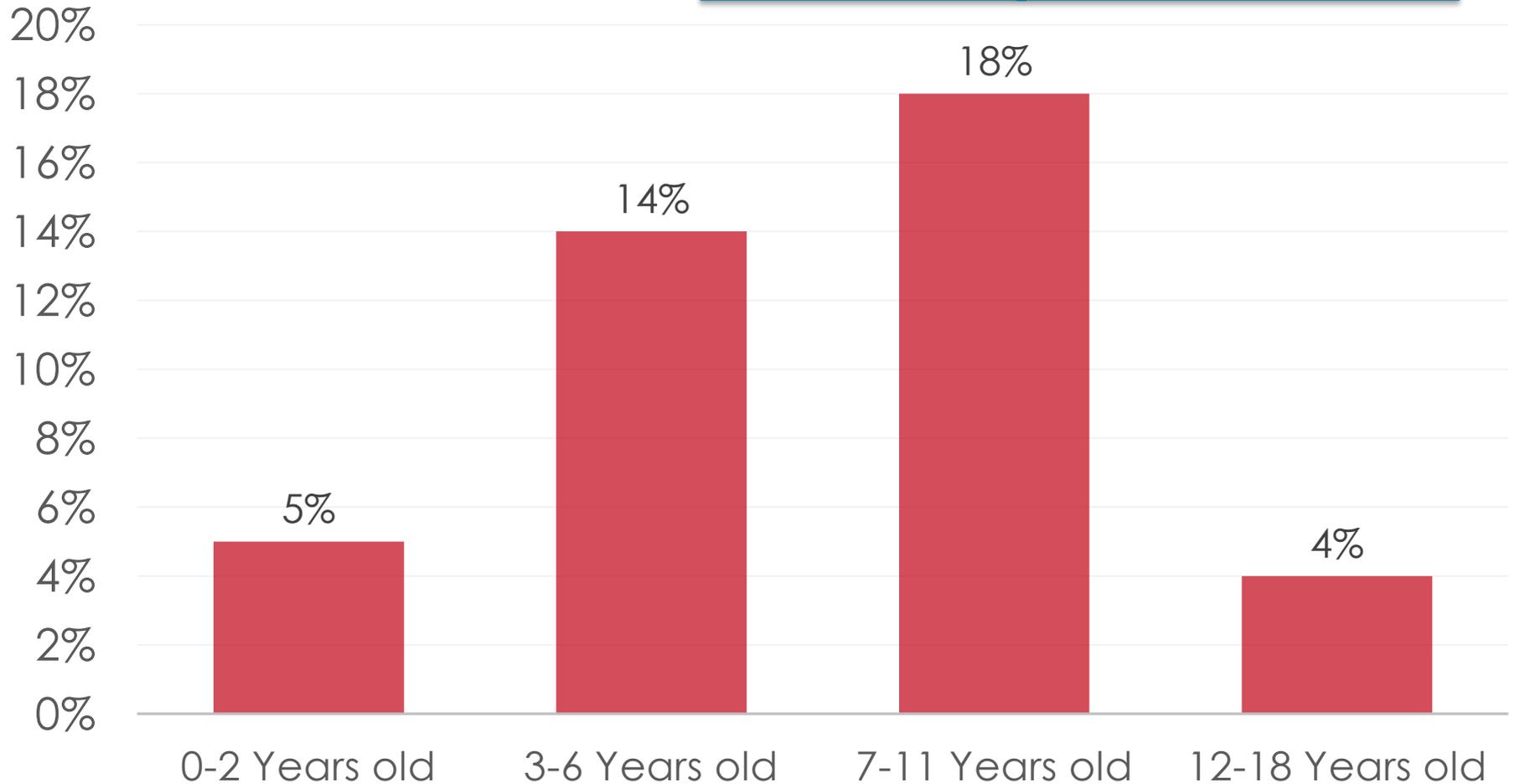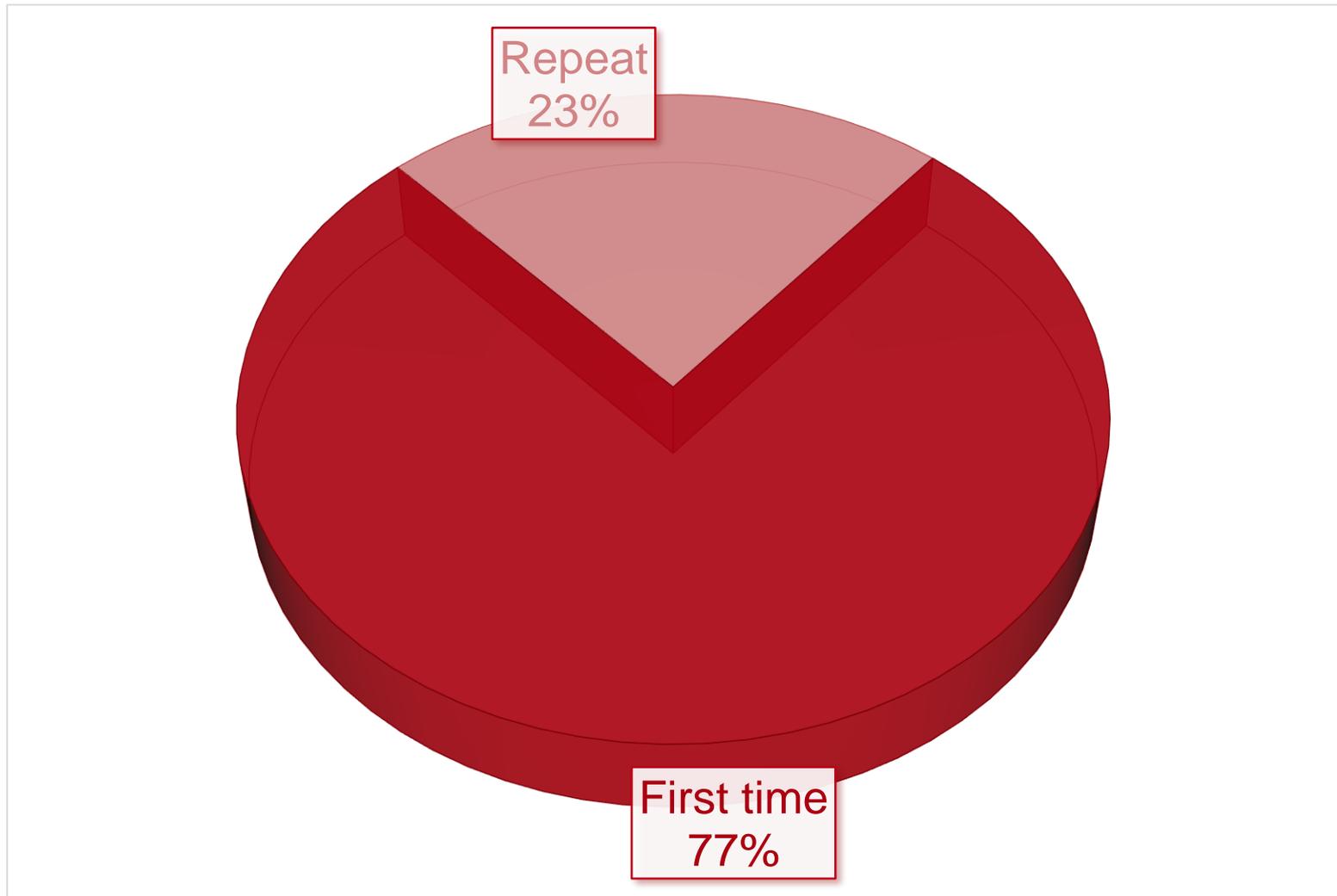
Trips to Guam – FY2018 Tracking

Chart legend: First (blue), Repeat (red)

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)	YTD
First	67%	61%	45%	77%	63%
Repeat	33%	39%	55%	23%	37%

[A]
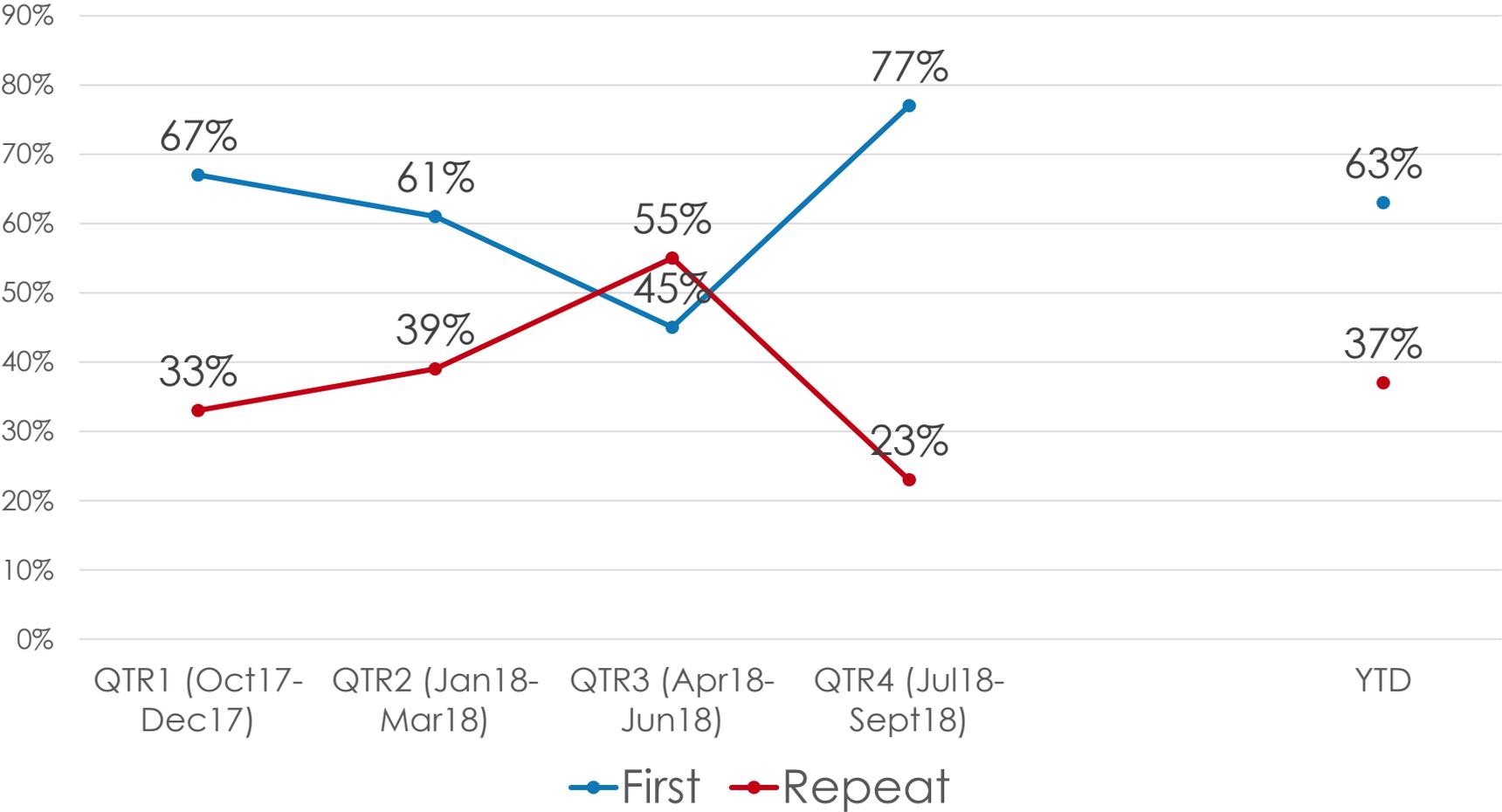
Trips to Guam – Key Segments

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

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
Q3	1st Time	77%	100%	95%	100%	78%	80%		74%	74%
	Repeat	23%		5%		22%	20%	100%	26%	26%
	Total	1055	1	38	4	935	119	238	817	635
Q3	Mean	1.37	1.00	1.05	1.00	1.35	1.27	2.64	1.41	1.46
	Median	1	1	1	1	1	1	2	1	1

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Length of Stay

Length of Stay	Percentage
One to two nights	2%
Three nights	40%
Four or more nights	58%

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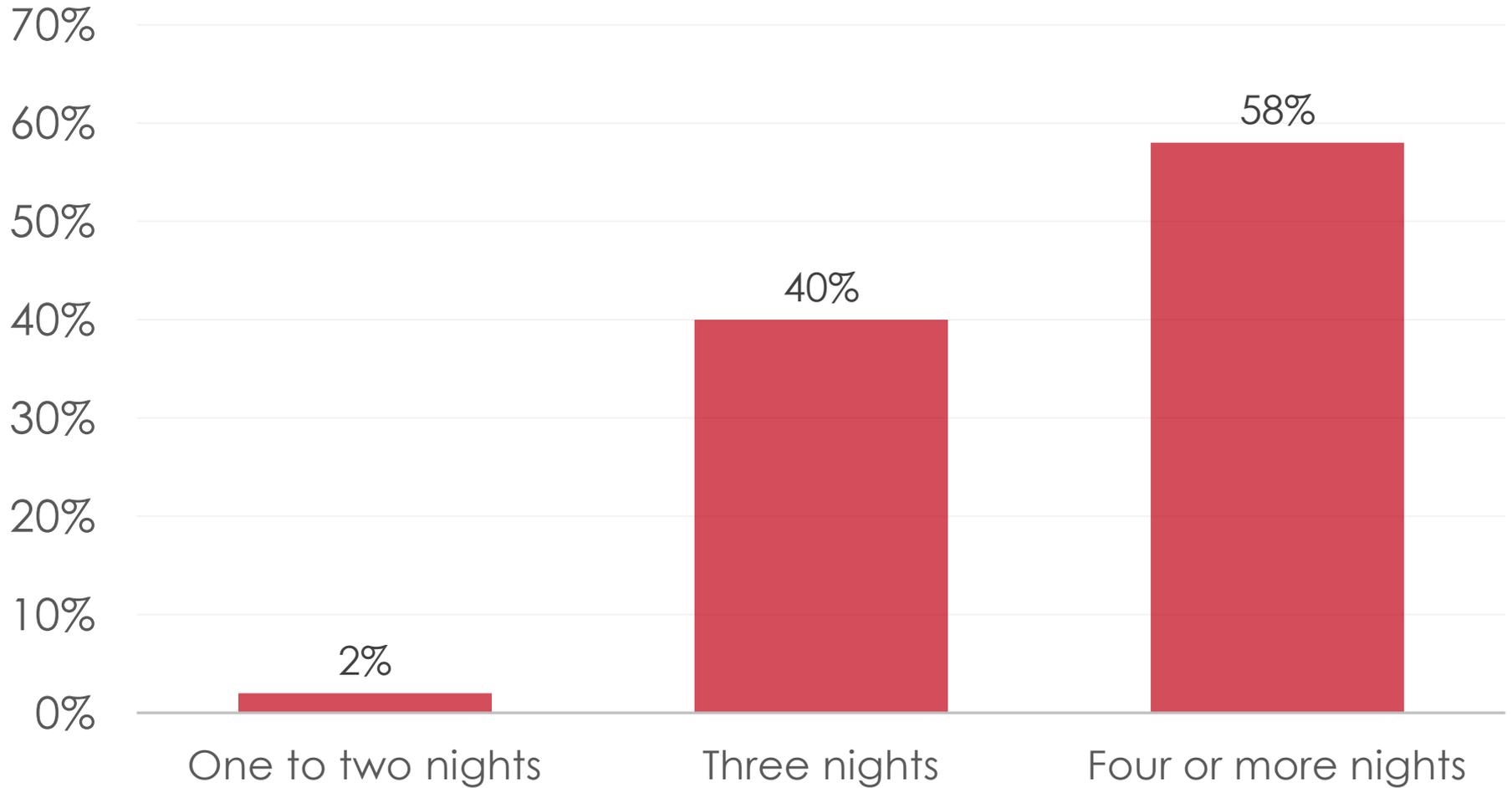
Length of Stay – FY2018 Tracking
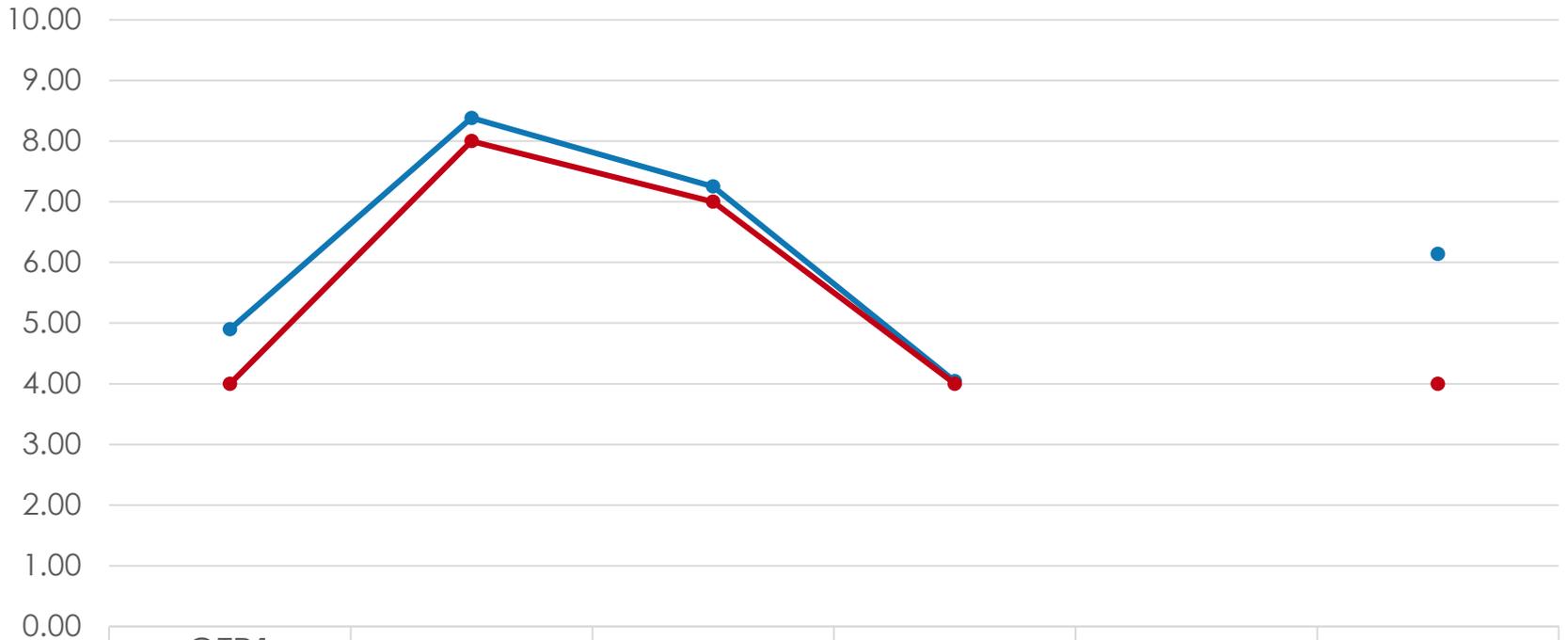
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	4.90	8.38	7.25	4.04		6.14
MEDIAN	4	8	7	4		4

[A]

Length of Stay – Key Segments

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

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
SA	1-2	2%				1%	3%	3%	1%	3%
	3	40%		21%		41%	46%	33%	38%	33%
	4+	58%	100%	79%	100%	58%	50%	64%	61%	65%
	Total	1055	1	38	4	935	119	238	817	635
SA	Mean	4.04	5.00	4.18	4.50	4.05	3.74	4.66	4.13	4.25
	Median	4	5	4	5	4	4	4	4	4

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[A]

Occupation – Top Responses (10%+)

Bar chart showing occupation top responses: Office Worker 34%, Self-employed 13%, Professional/ Specialist 12%.

[A]
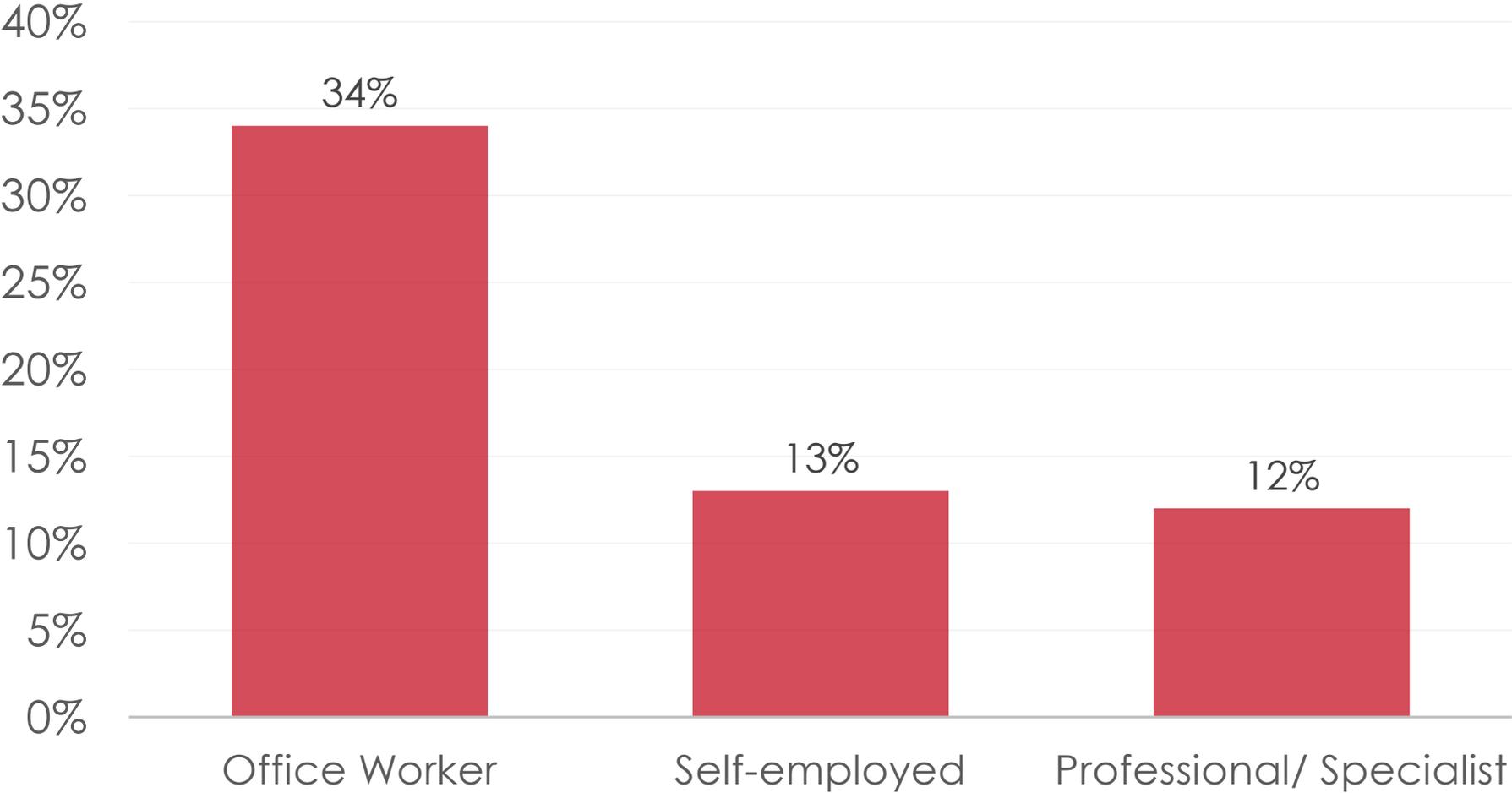
SECTION 2
TRAVEL PLANNING

[A]

Organized Group Tour

No
89%

Organized
Group Tour
11%

[A]
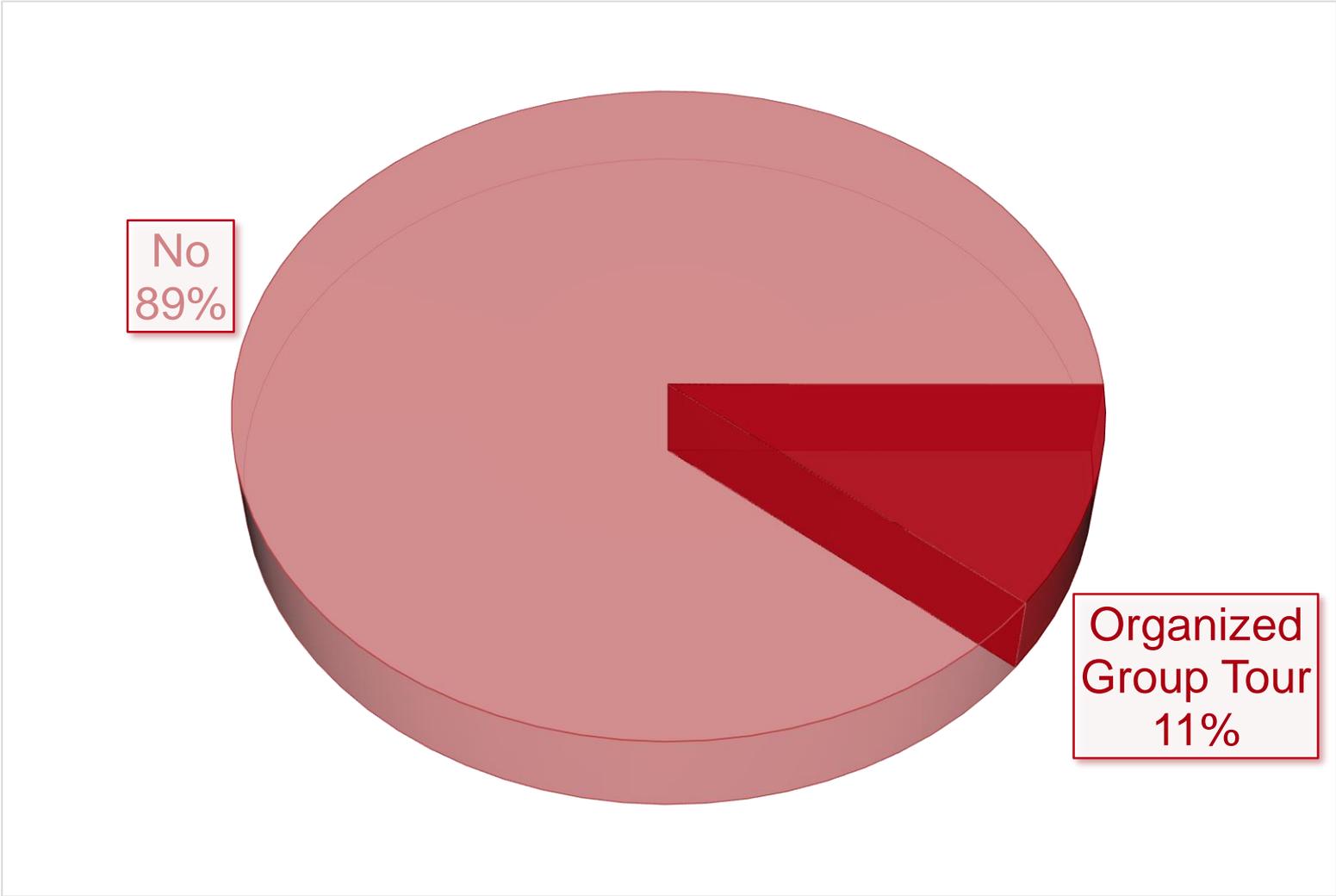
Organized Group Tour- Tracking
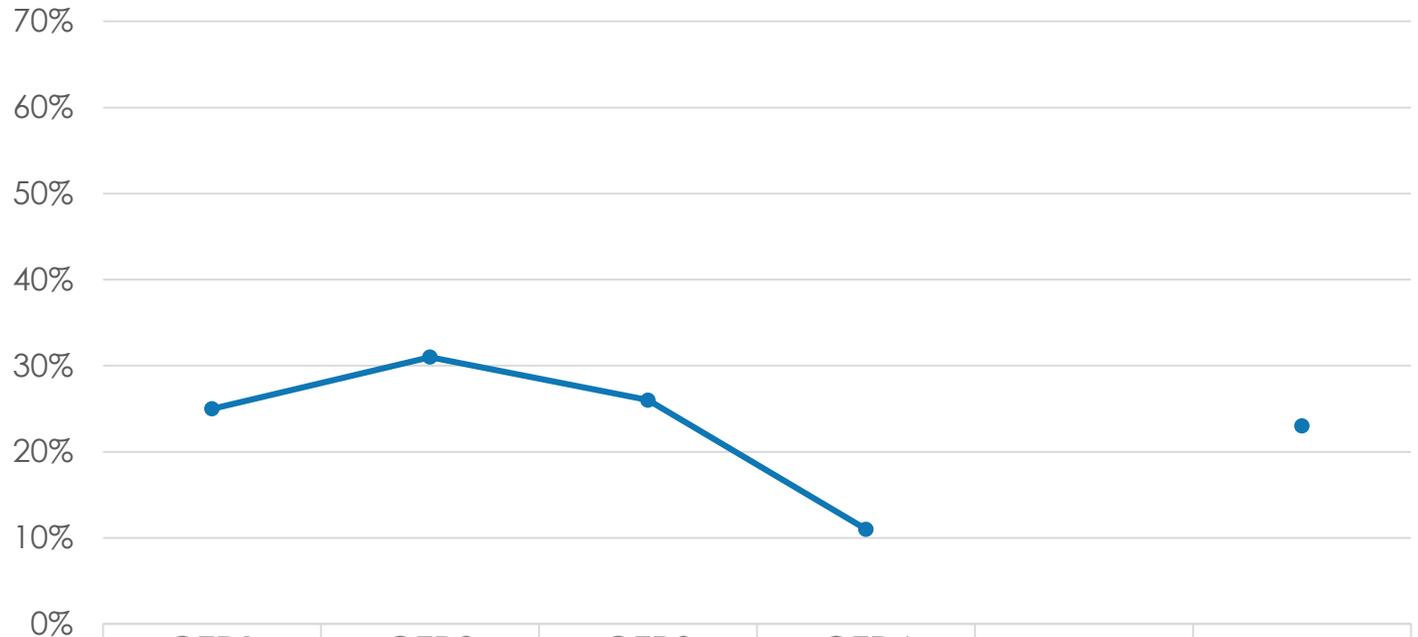
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
Organized Group Tour	25%	31%	26%	11%		23%

[A]

Travel Arrangements - Sources

[A]
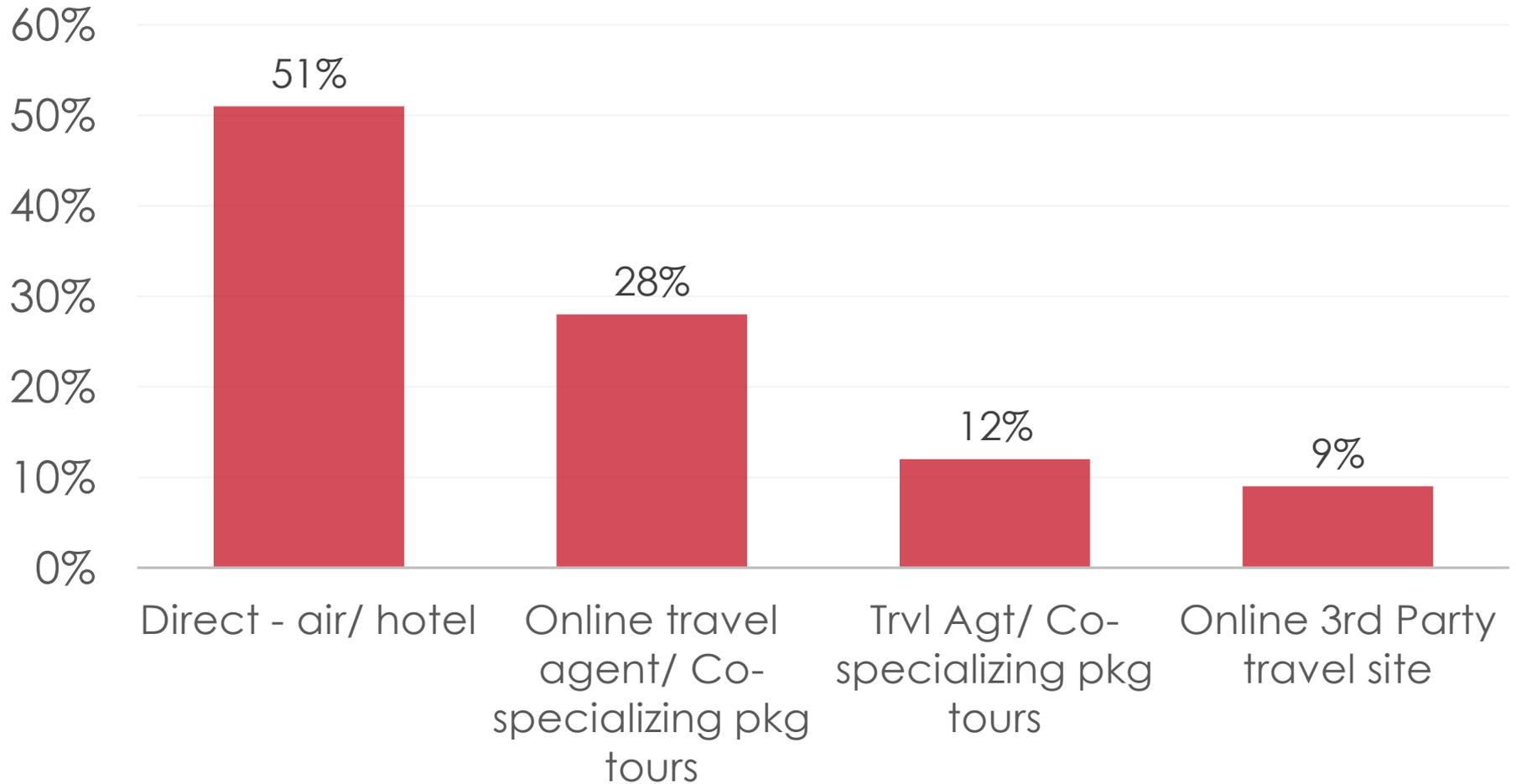
Travel Arrangements - Sources
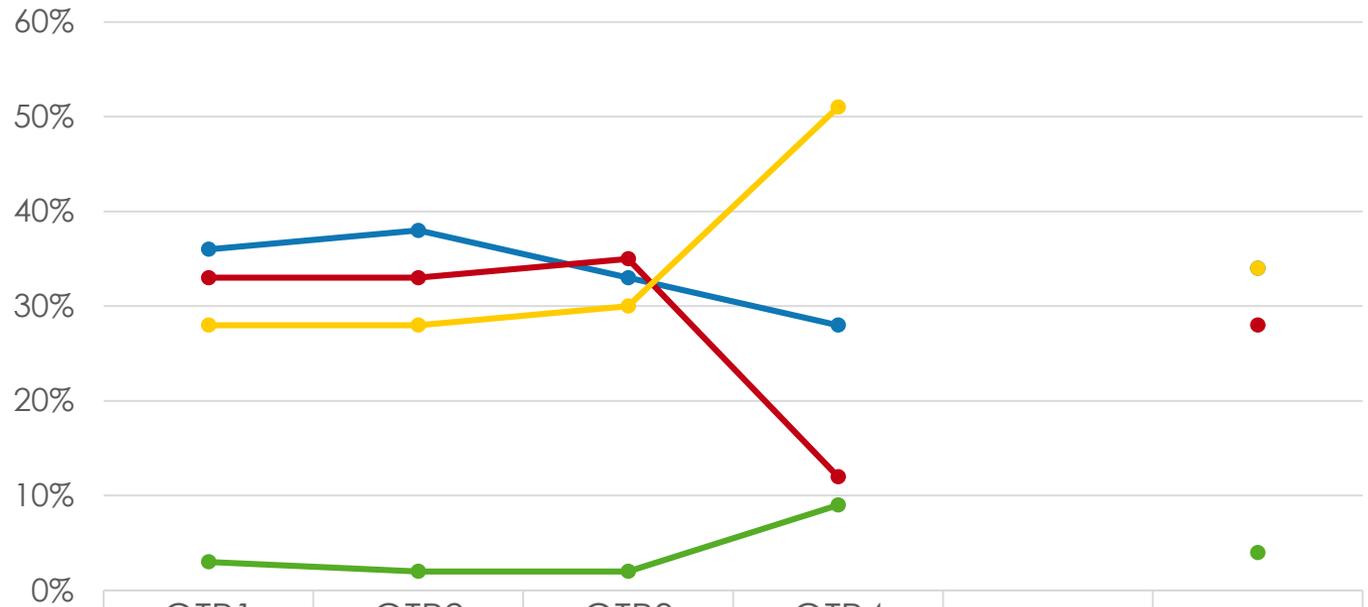
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
Online travel agent	36%	38%	33%	28%		34%
Trvl Agt/ Co- Pkg Tour	33%	33%	35%	12%		28%
Online 3rd Party	3%	2%	2%	9%		4%
Direct Air/ Hotel	28%	28%	30%	51%		34%

[A]

Prepaid Package Trip

No
54%

Prepaid Pkg
46%

[A]
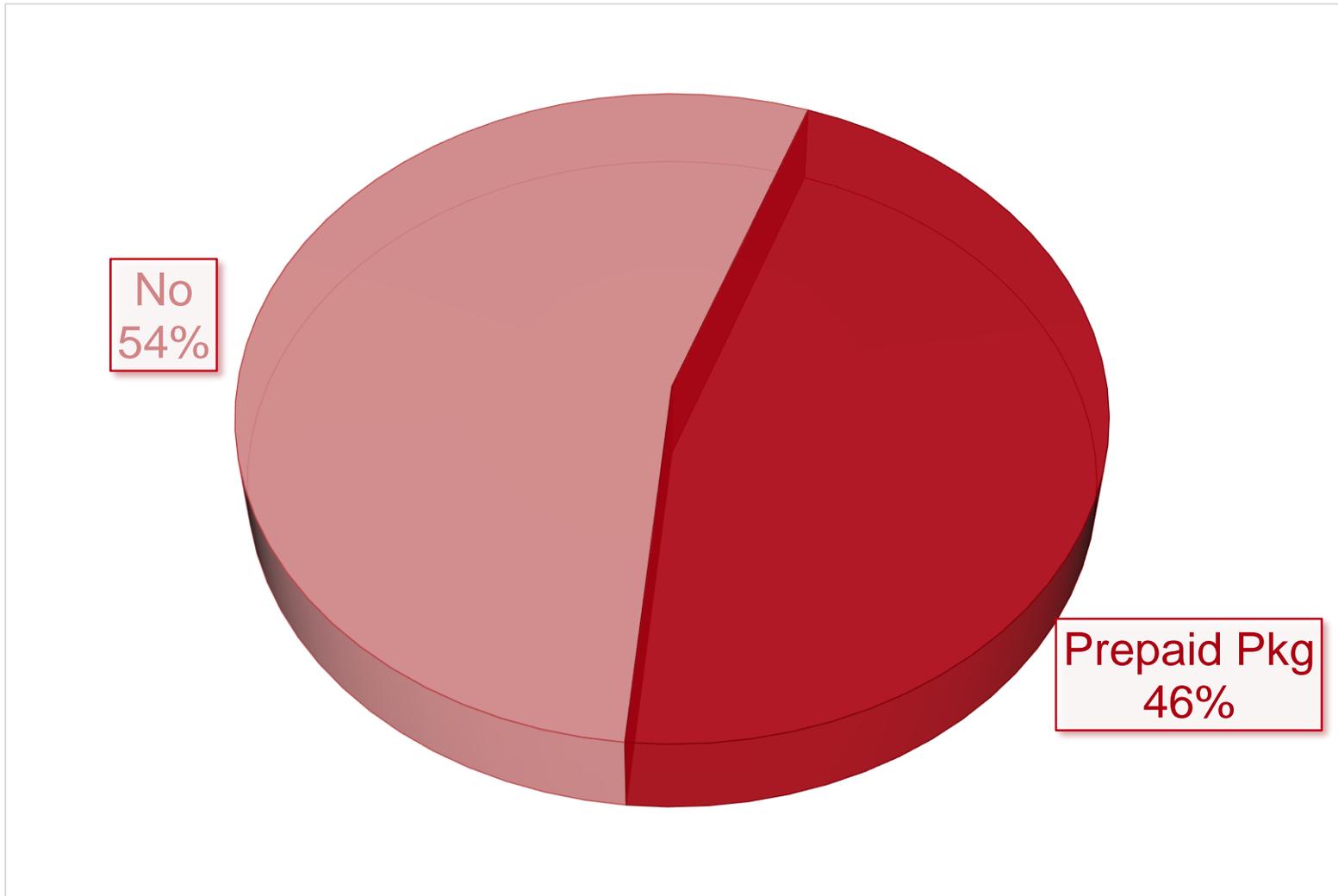
Prepaid Package Trip
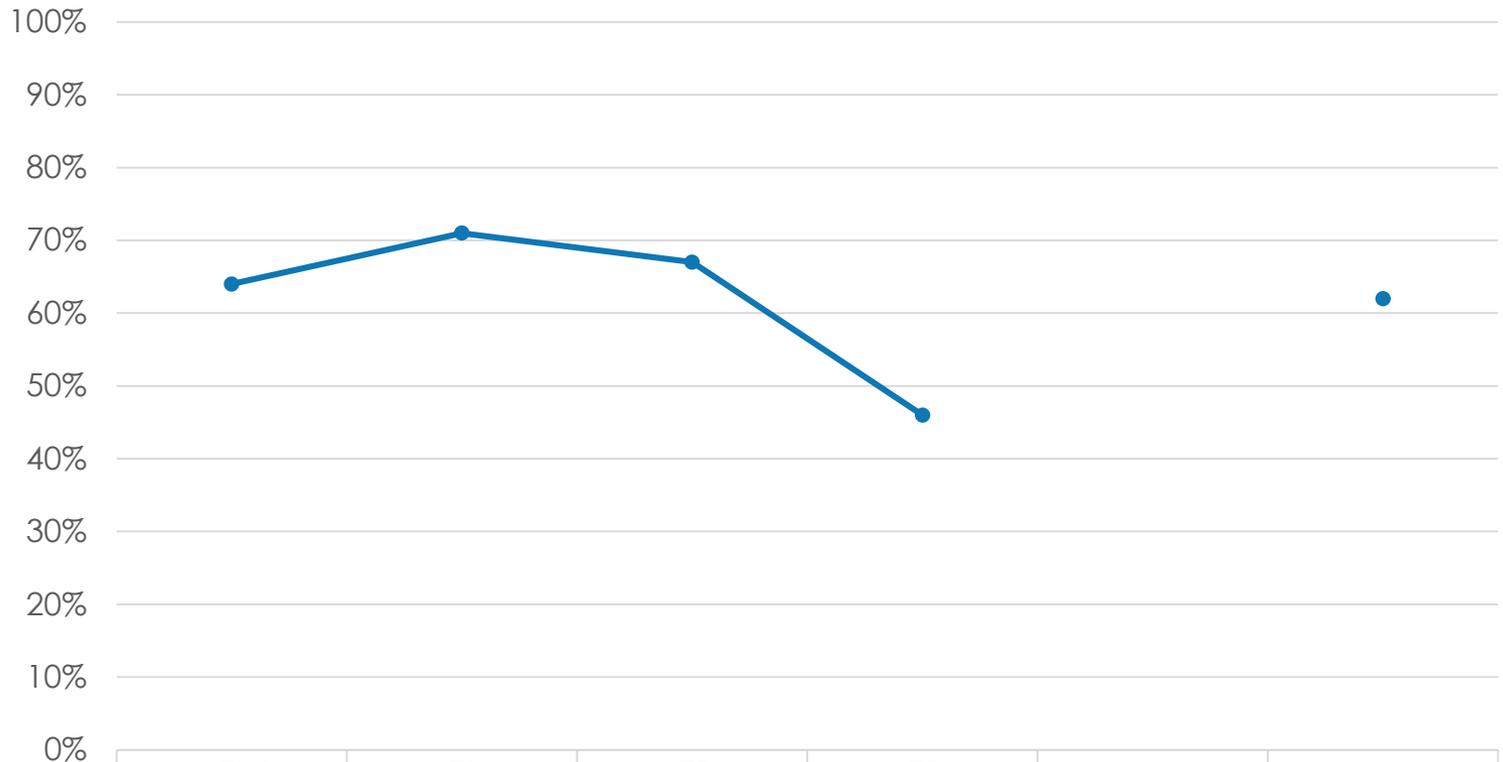
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
Prepaid Pkg Trip	64%	71%	67%	46%		62%

[A]

Accommodations (Top Responses)
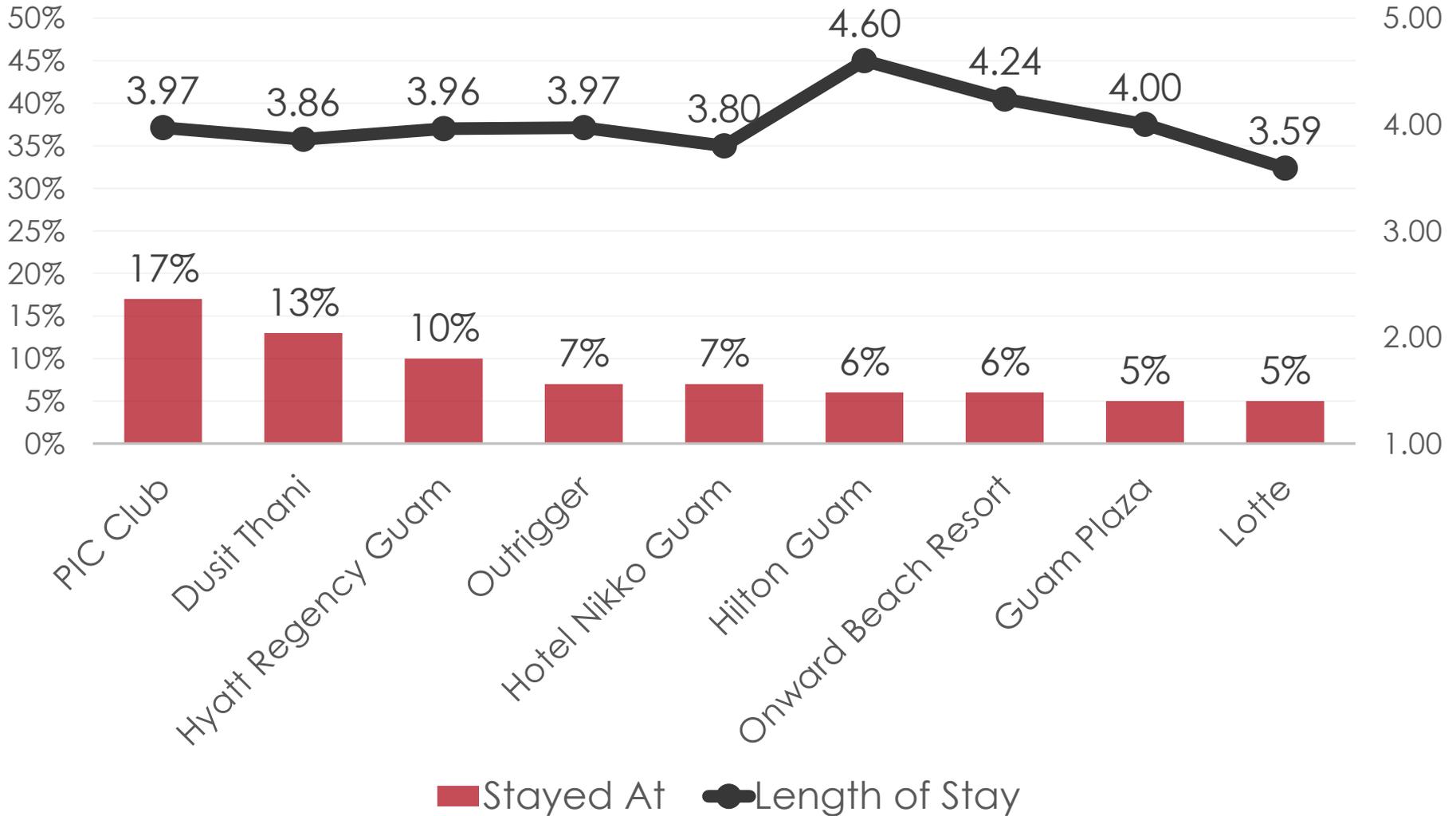
Travel Motivation (Top Responses)

Motivation	Percentage
Natural beauty	65%
Relax	43%
Shopping	36%
Pleasure	33%
Trvl time	26%
Recommendation	22%
Water sports	20%
Safe	15%
Prior visit	13%
Price	8%

[A]
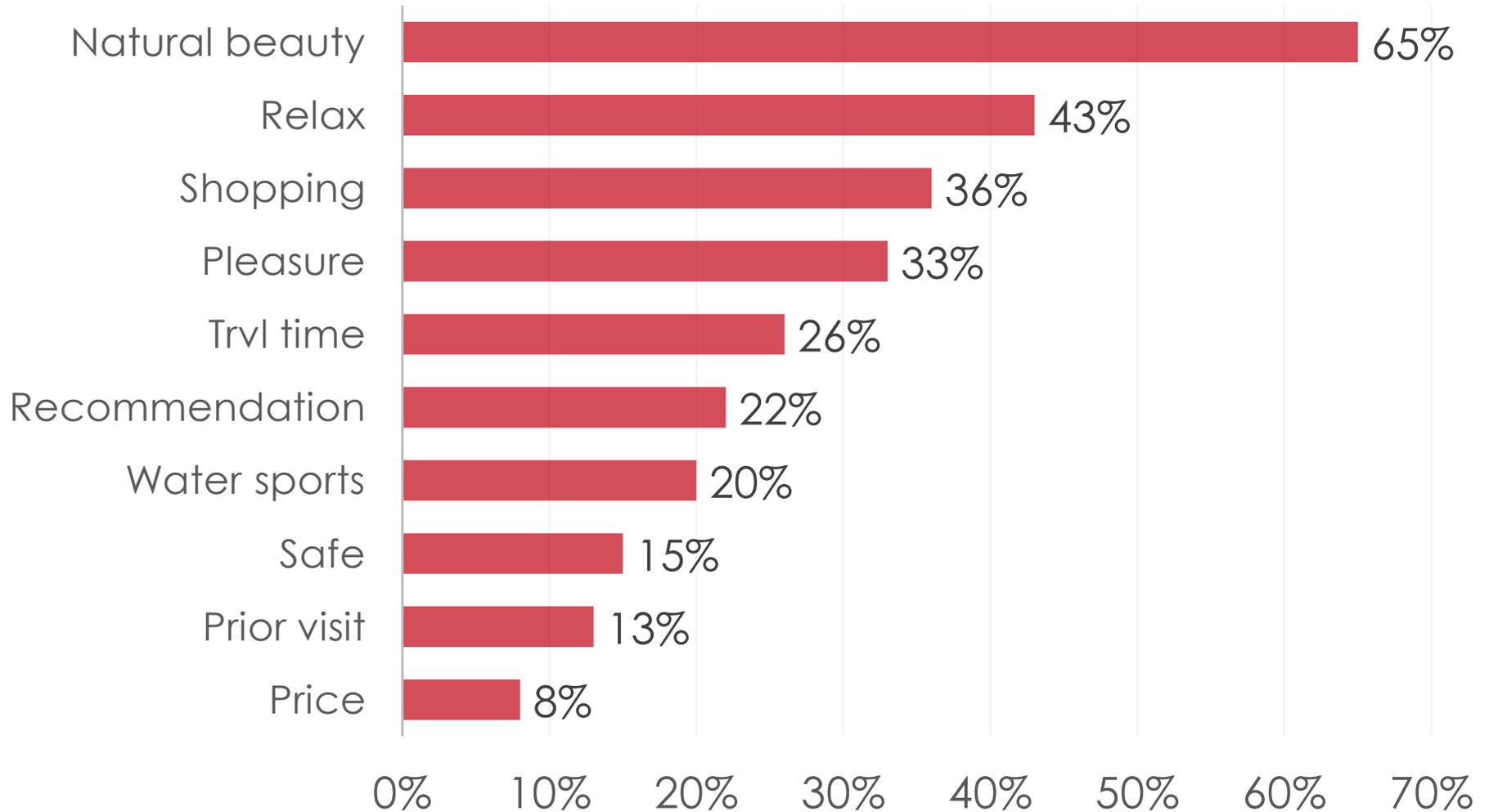
Travel Motivation – Key Segments

|		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
Q5A	Beautiful seas, beaches, tropical climate	65%	100%	55%	50%	73%	62%	59%	65%	68%
	Just to relax	43%		45%		48%	44%	30%	43%	43%
	Shopping	36%		34%	50%	36%	42%	36%	37%	40%
	Pleasure/ vacation	33%	100%	18%		37%	31%	32%	33%	34%
	Short travel time (not too far from home)	26%		11%		23%	21%	22%	28%	28%
	Recommendation of friend/ relative/ travel agency	22%		18%	50%	20%	28%	6%	22%	17%
	Water sports (snorkeling, windsurfing, parasailing)	20%		3%		17%	15%	15%	16%	18%
	It is a safe place to spend a vacation	15%		3%		13%	13%	11%	17%	10%
	A previous visit	13%				12%	9%	59%	16%	14%
	Price of the tour package	8%				7%	8%	13%	7%	7%
	Honeymoon	4%		100%	25%	3%	5%	1%	5%	4%
	Scuba diving	3%		3%		2%	3%	1%	2%	3%
	To visit friends or relatives	3%				2%	4%	6%	2%	3%
	To golf	1%				1%		0%	1%	0%
	Career certification/ testing	1%			25%	0%	2%	2%	0%	1%
	School trip	1%				1%	1%	2%	1%	1%
	Company/ business trip	1%				0%	2%	1%		1%
	Organized sporting activity/ event	0%				0%	1%		0%	0%
	My company sponsored me	0%				0%	1%	0%	0%	0%
	To Get Married/ attend Wedding	0%		3%	100%	0%			0%	0%
	Adventure	0%				0%		0%	0%	0%
	Incentive trip	0%	100%			0%			0%	0%
	Shop Guam E-Fest	0%							0%	
	Total	1051	1	38	4	935	117	236	813	635

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SECTION 3 EXPENDITURES

[A]

Prepaid Expenditures

- $2,530.00 = overall mean average prepaid expense (for entire travel party size) by respondent

- $917.42 = overall mean average <u>per person</u> prepaid expenditures

[A]

Prepaid Entire Travel Party – FY2018 Tracking
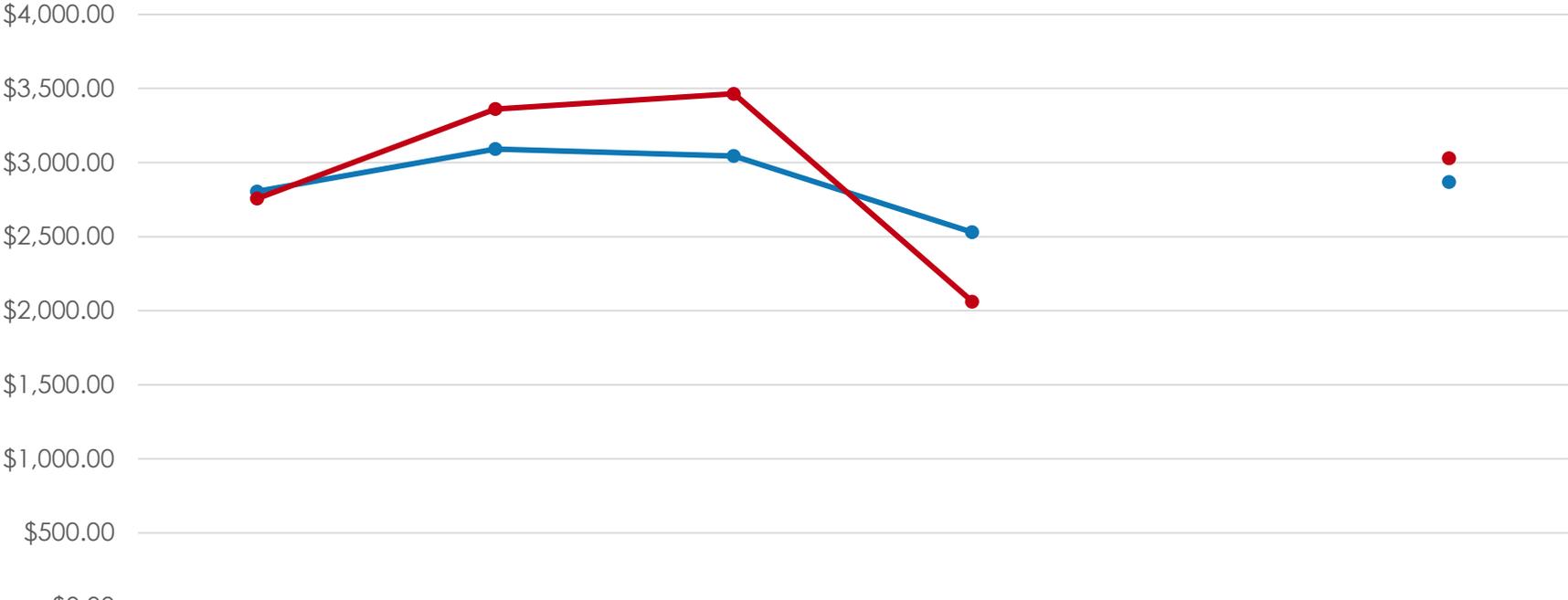
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	$2,805.07	$3,091.40	$3,044.20	$2,530.00		$2,868.04
MEDIAN	$2,757.00	$3,362.00	$3,464.00	$2,061.00		$3,030.00

[A]

Prepaid Per Person– FY2018 Tracking
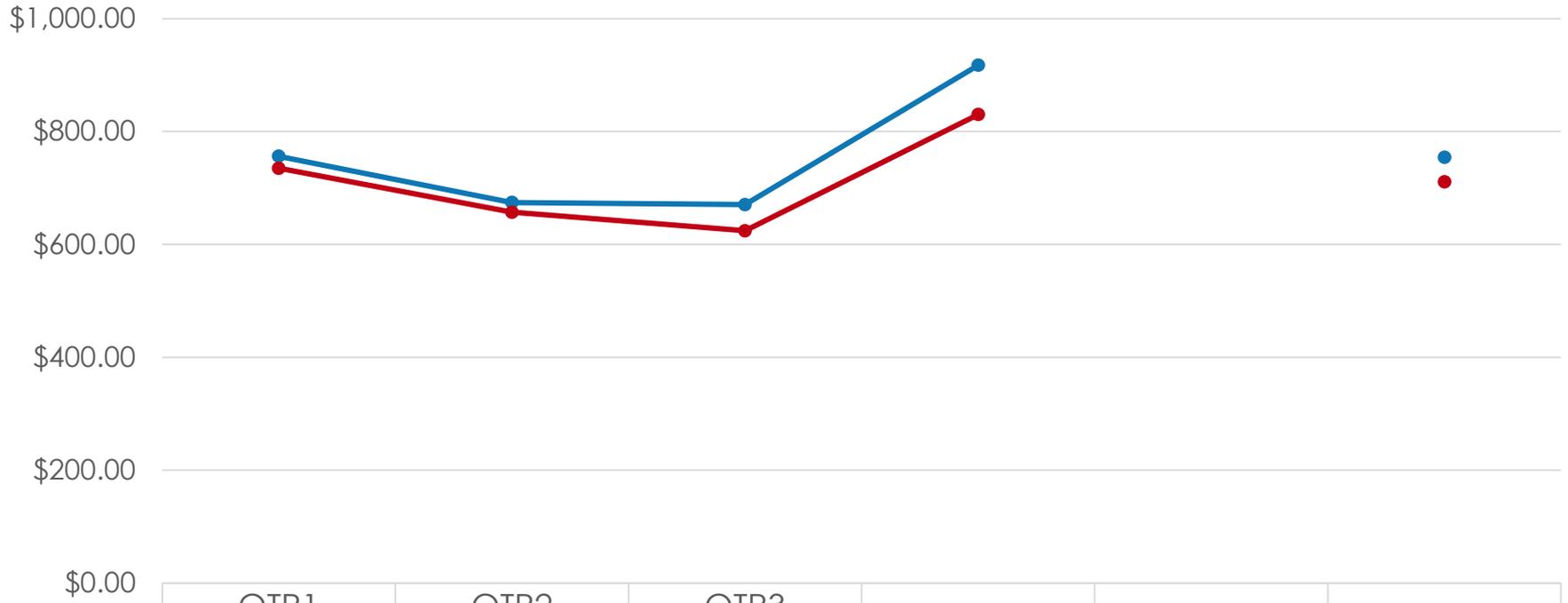
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	$756.22	$674.15	$670.41	$917.42		$754.38
MEDIAN	$735.00	$657.00	$624.00	$830.00		$711.00

[A]

Prepaid Per Person– Key Segments

GVB EXIT SURVEY
Q10A PREPAID - PER PERSON:

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
PREPAID PP	Mean	$917.42	$624.96	$1,025.32	$1,151.81	$917.42	$967.27	$822.74	$907.01	$895.24
	Median	$830	$625	$1,113	$1,188	$812	$858	$744	$847	$746

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[A]

Prepaid Expenses by Category – MEAN Entire Travel Party

Bar chart of prepaid expenses by category:

- Air/ Hotel pkg: $2,219.59
- Air/ Hotel/ Meal pkg: $2,979.08
- Air Only: $1,001.16
- Hotel Only: $810.83
- Hotel/ Meal: $1,142.57
- F&B Hotel: $445.99
- Ground Trans-Korea: $157.13
- Ground Trans-Guam: $162.05
- Optional Tour: $382.47
- Other: $177.12

[A]
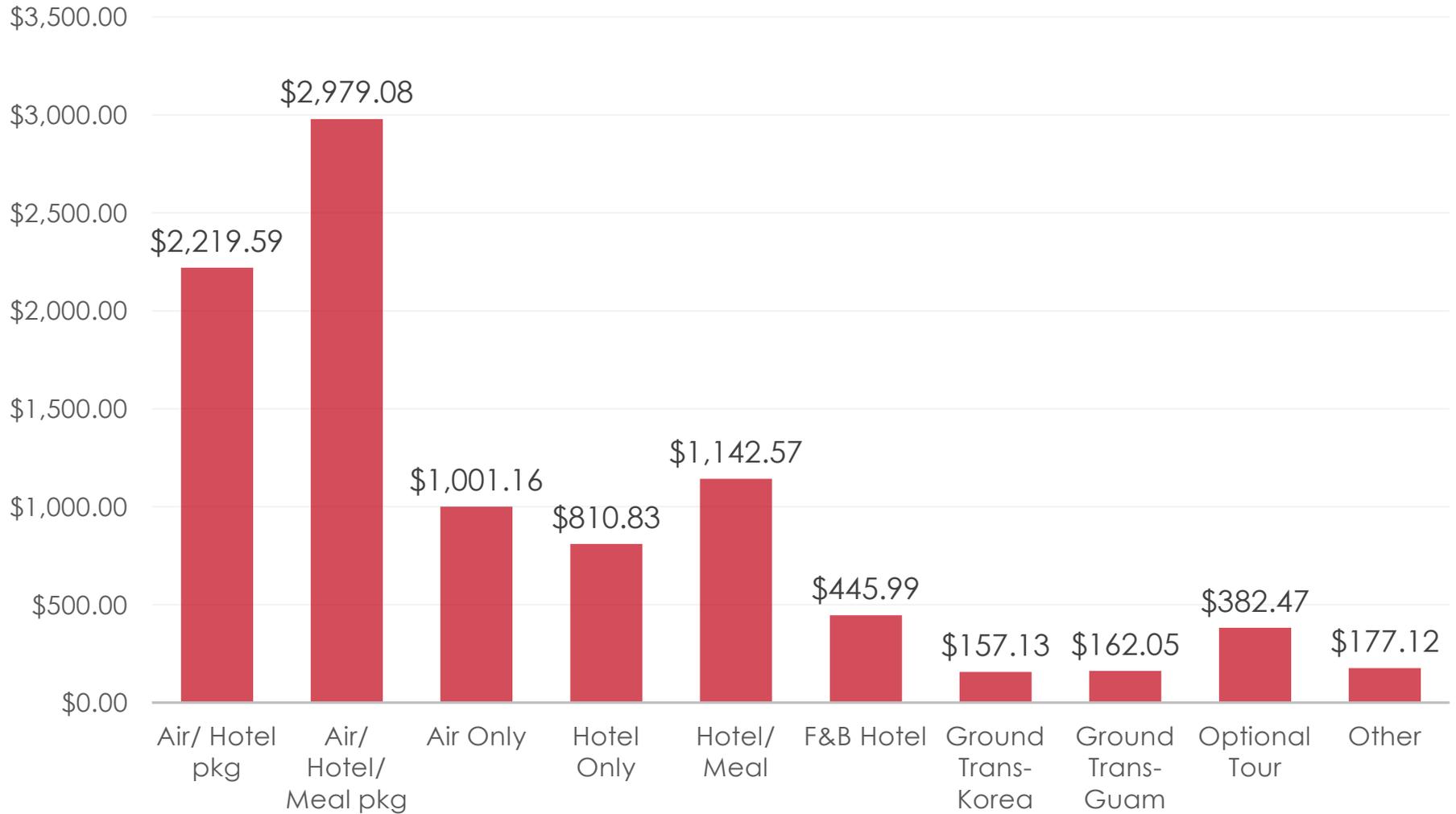
Prepaid– FY2018 Tracking
Airfare & Accommodation Packages
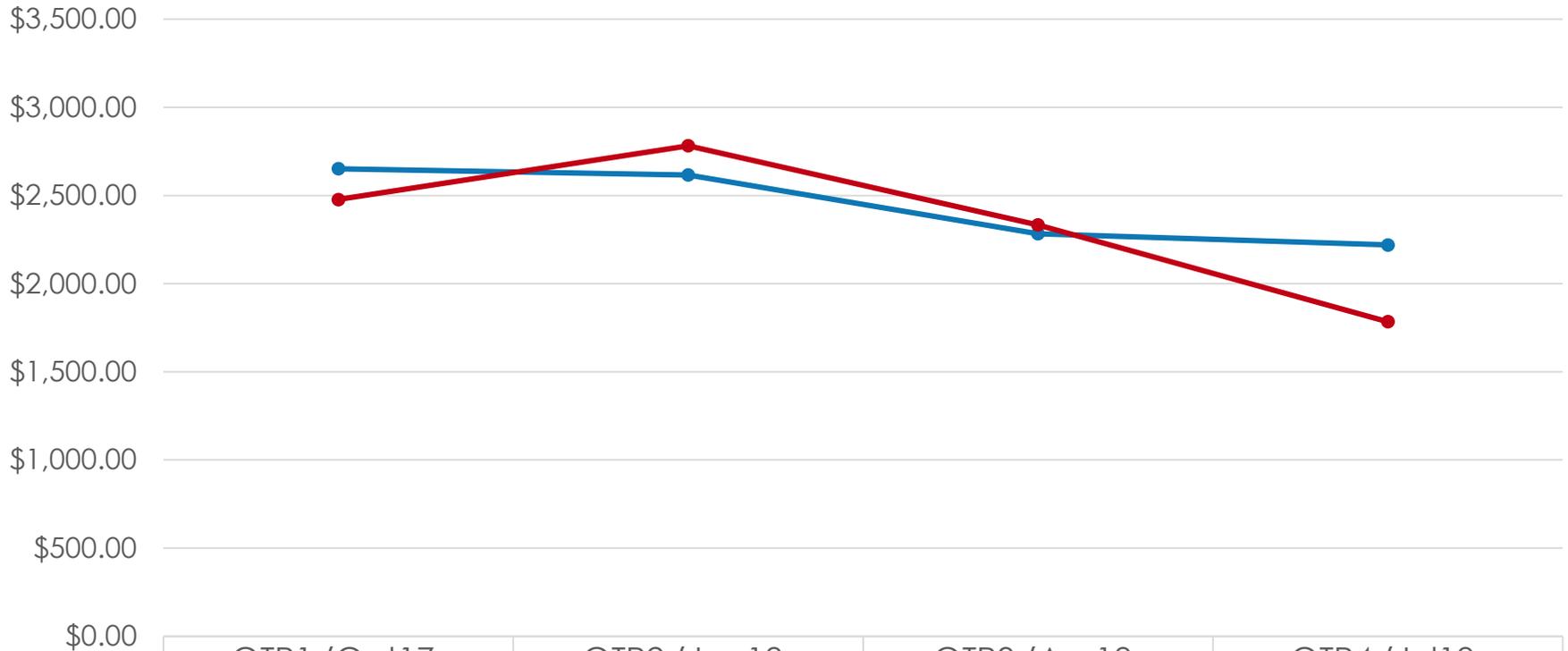
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$2,652.20	$2,616.47	$2,283.48	$2,219.59
MEDIAN	$2,477.00	$2,782.00	$2,333.00	$1,784.00

[A]

Prepaid– FY2018 Tracking
Airfare & Accommodation W/ Meal Packages
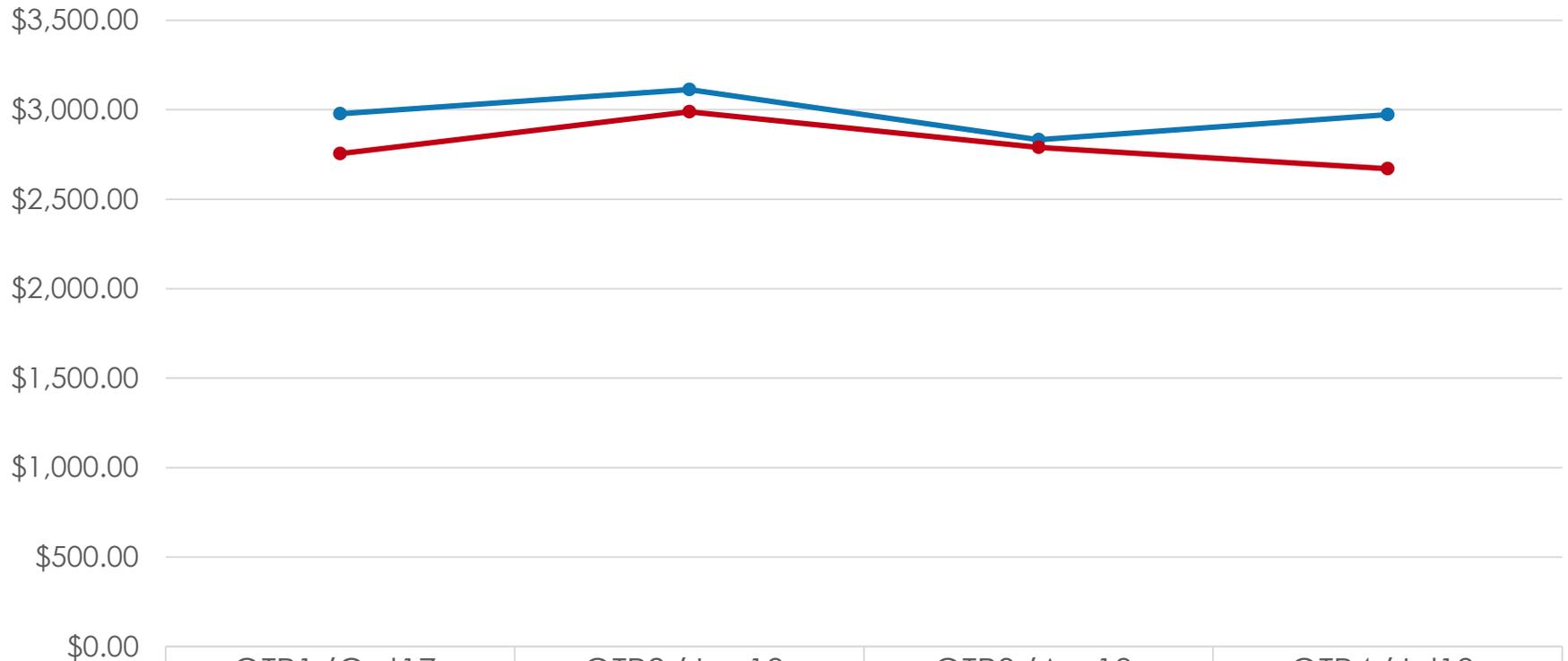
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$2,978.05	$3,113.28	$2,833.09	$2,973.08
MEDIAN	$2,755.00	$2,989.00	$2,790.00	$2,671.00

[A]

Prepaid– FY2018 Tracking
Airfare Only
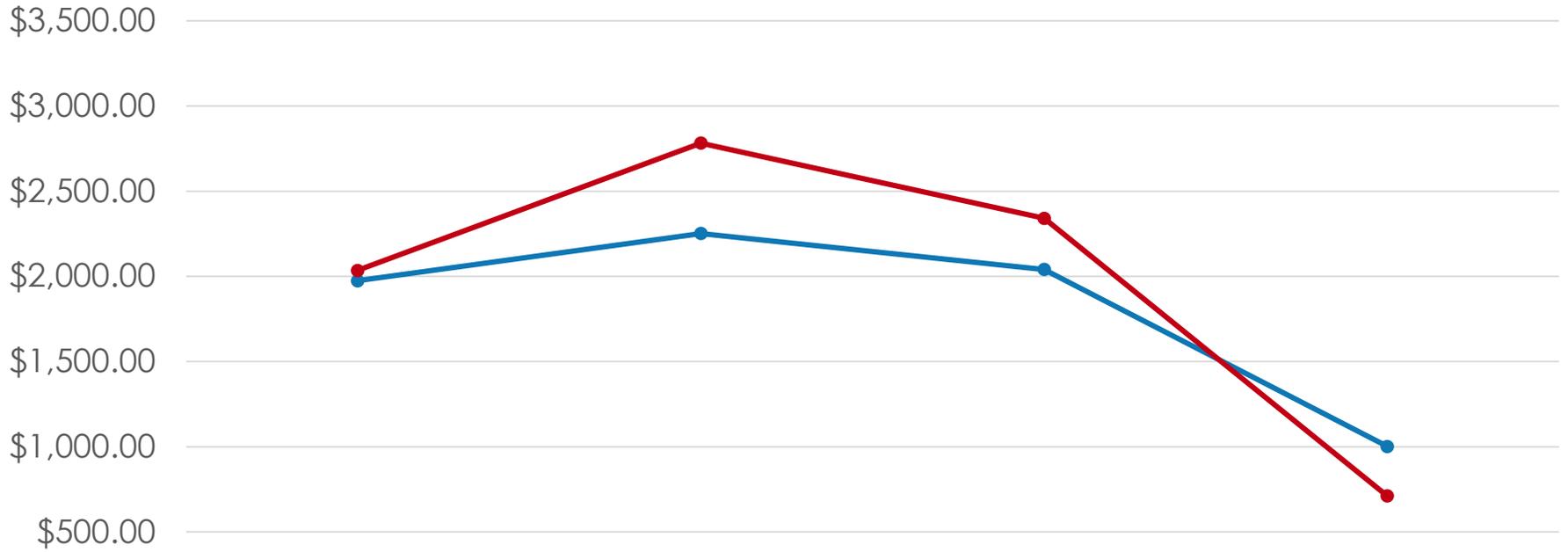
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$1,973.98	$2,252.06	$2,040.79	$1,001.16
MEDIAN	$2,035.00	$2,782.00	$2,341.00	$711.00

[A]

Prepaid– FY2018 Tracking
Accommodations Only
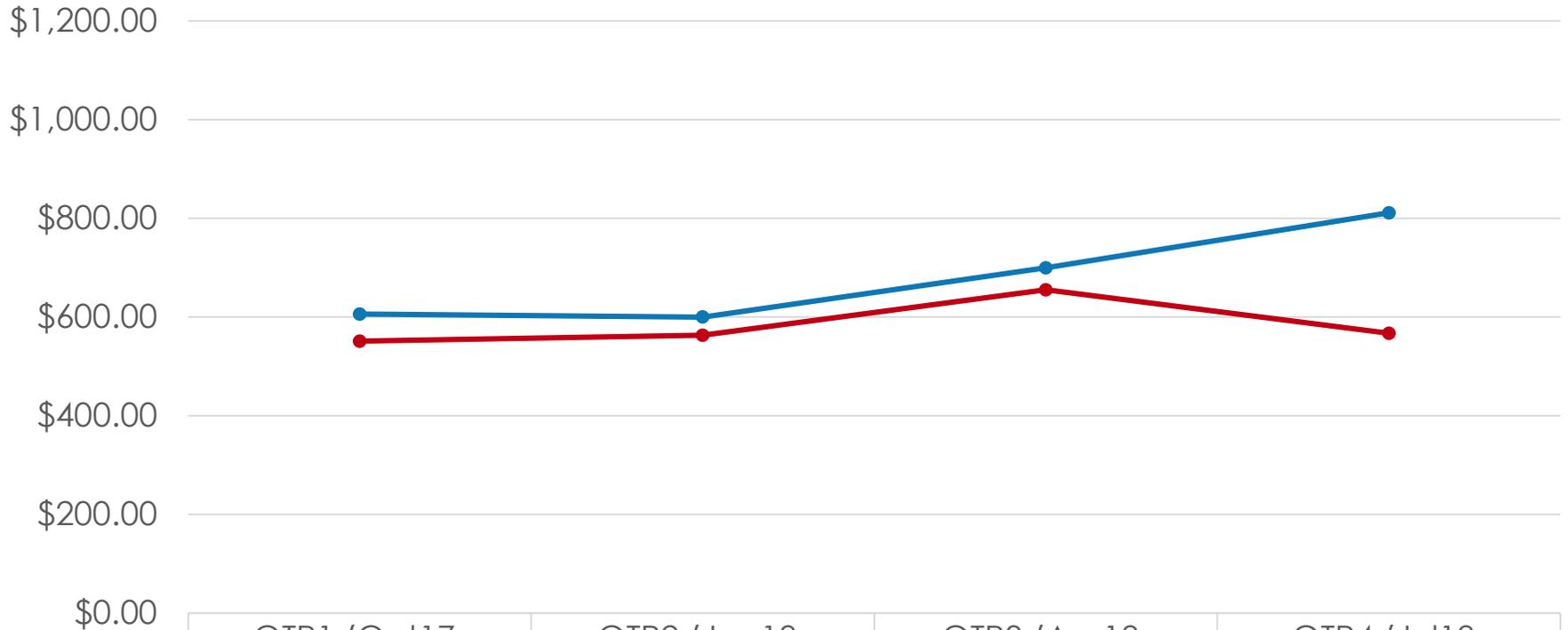
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$605.95	$599.97	$699.58	$810.83
MEDIAN	$551.00	$563.00	$655.00	$567.00

[A]

Prepaid– FY2018 Tracking
Accommodations w/ Meal Only
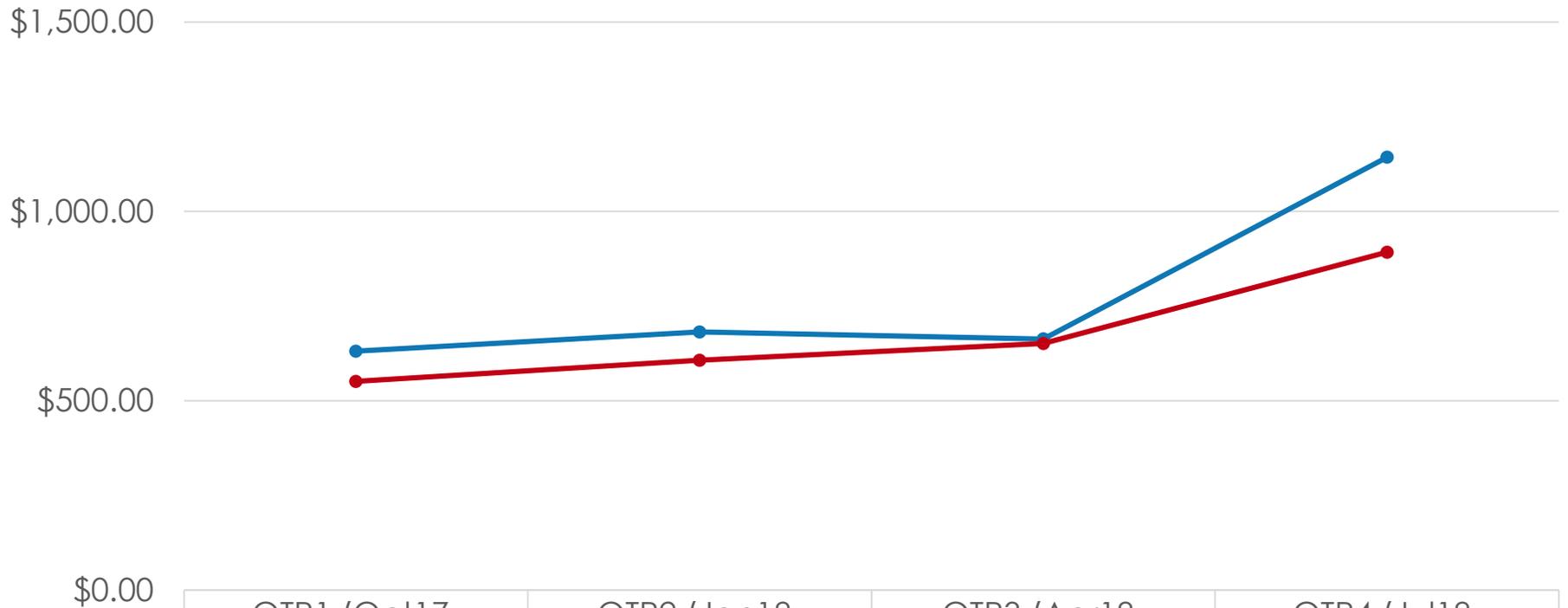
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$630.85	$681.54	$663.13	$1,142.57
MEDIAN	$551.00	$607.00	$651.00	$892.00

[A]

Prepaid– FY2018 Tracking
Food & Beverage in Hotel
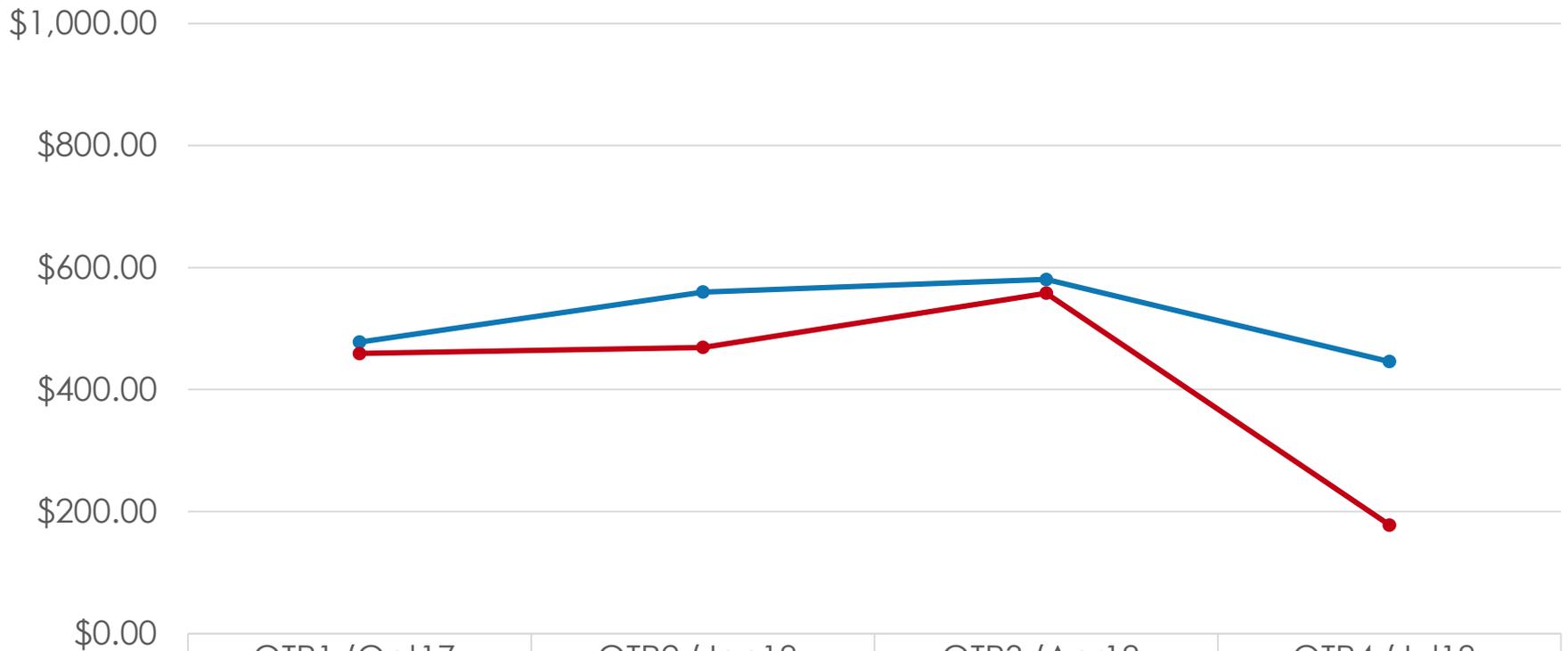
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$477.94	$559.90	$580.51	$445.99
MEDIAN	$459.00	$469.00	$558.00	$178.00

[A]

Prepaid– FY2018 Tracking
Ground Transportation - Korea

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$267.11	$523.67	$488.55	$157.13
MEDIAN	$92.00	$469.00	$465.00	$45.00

[A]
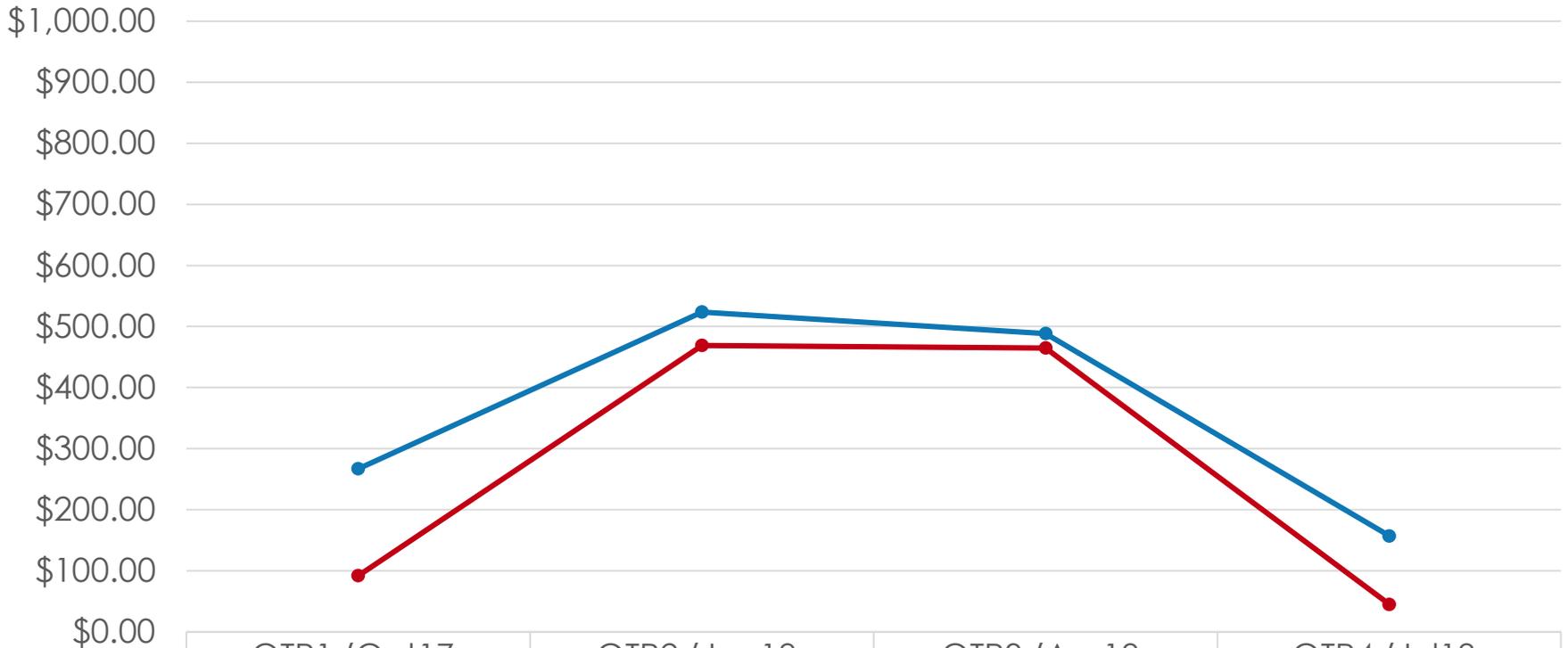
Prepaid– FY2018 Tracking
Ground Transportation - Guam
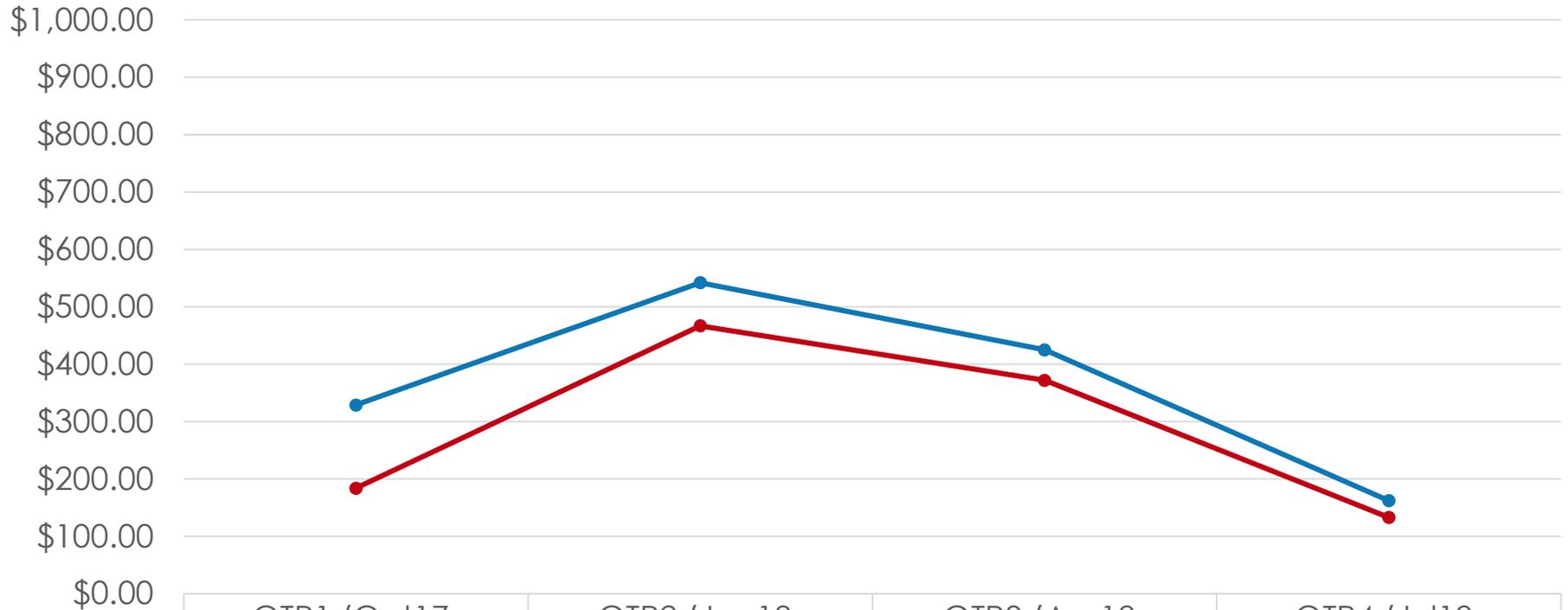
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$328.96	$542.15	$425.18	$162.05
MEDIAN	$184.00	$467.00	$372.00	$133.00

[A]

Prepaid– FY2018 Tracking
Optional tours/ Activities
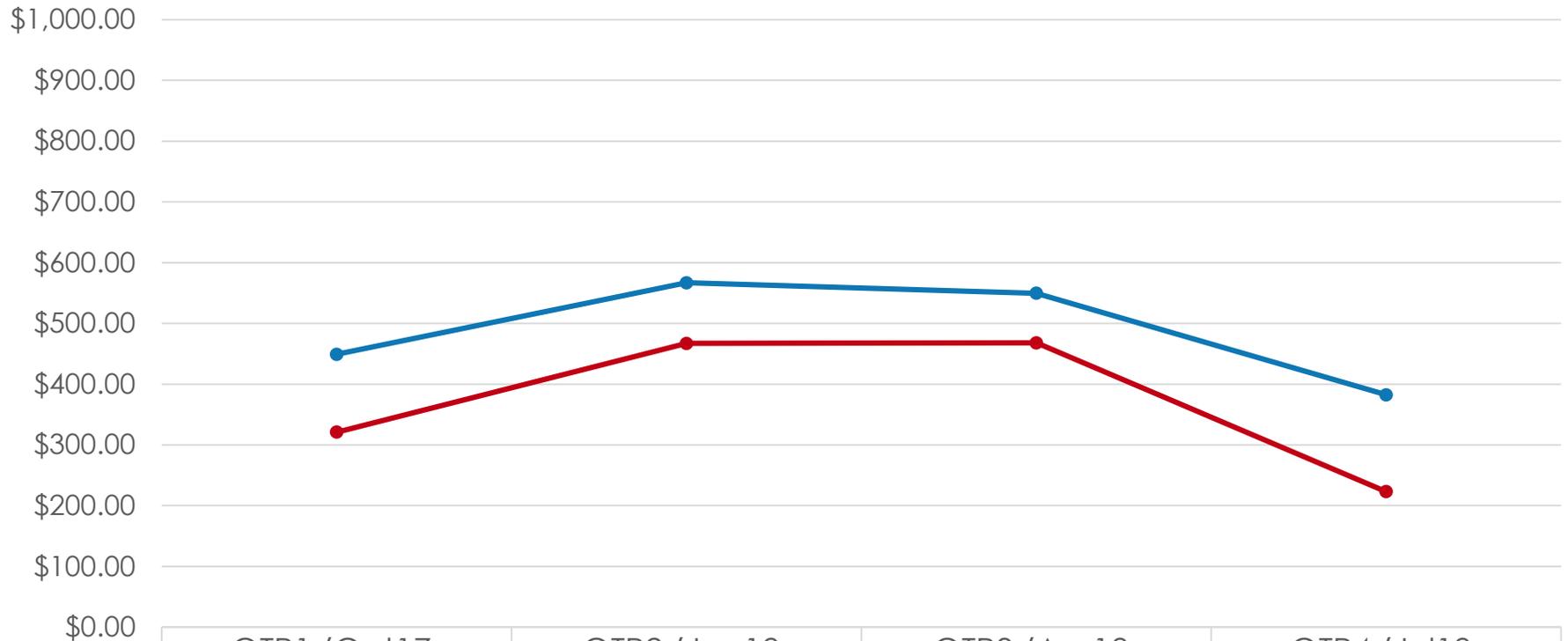
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$449.18	$566.90	$549.58	$382.47
MEDIAN	$321.00	$467.00	$468.00	$223.00

[A]

On-Island Expenditures

- $1,313.08 = overall mean average on-island expense (for entire travel party size) by respondent

- $646.02 = overall mean average <u>per person</u> on-island expenditures

[A]

On-Island Entire Travel Party – FY2018 Tracking
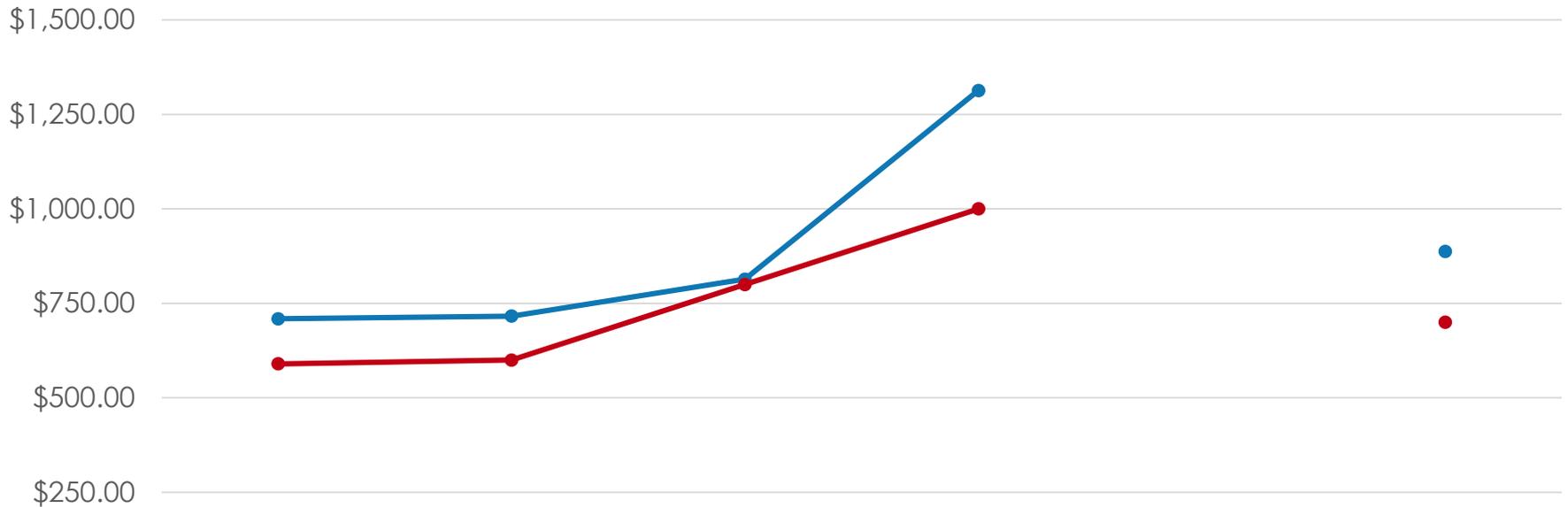
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	$709.07	$716.13	$813.98	$1,313.08		$887.40
MEDIAN	$590.00	$600.00	$800.00	$1,000.00		$700.00

[A]

On-Island Per Person – FY2018 Tracking
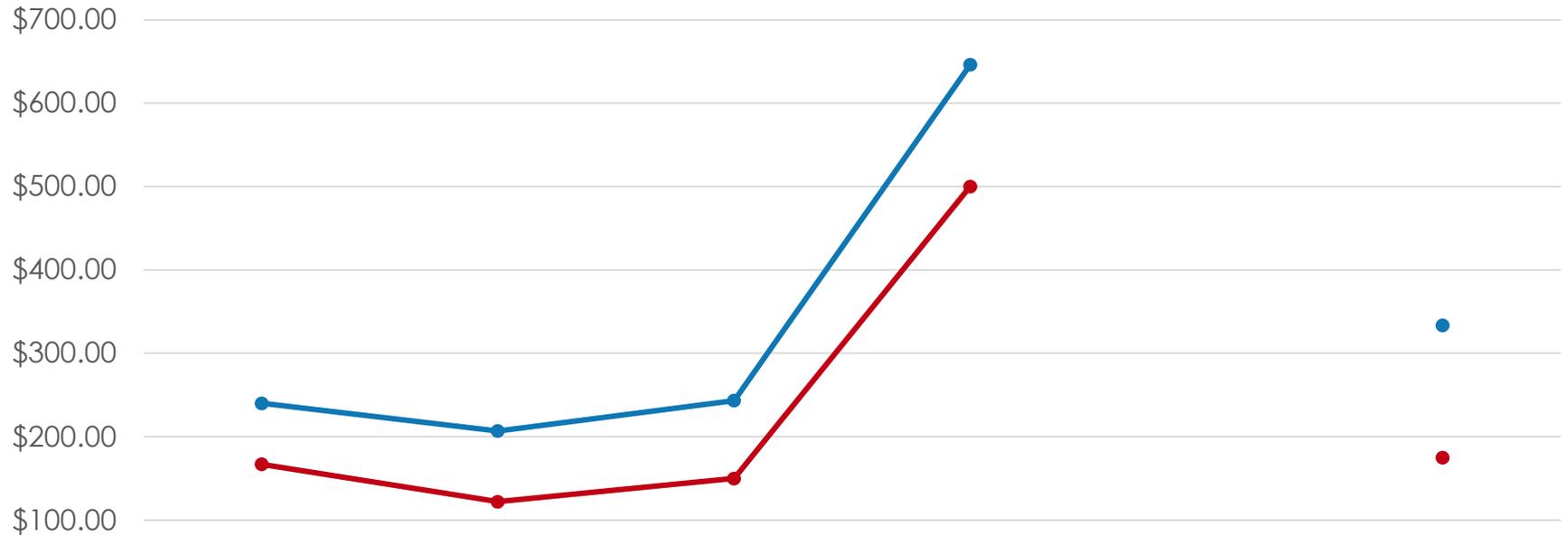
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	$240.04	$206.86	$243.40	$646.02		$333.44
MEDIAN	$167.00	$122.00	$150.00	$500.00		$175.00

[A]

On-Island Per Person – Key Segments

GVB EXIT SURVEY
Q11A ONISLE EXPENDITURE- PER PERSO

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
ONISLE PP	Mean	$646.02	$500.00	$996.88	$2,082.50	$639.37	$554.25	$599.86	$635.96	$682.03
	Median	$500	$500	$739	$1,170	$500	$333	$400	$450	$500

Prepared by Anthology Research

[A]

Per Person MEAN expenditures – FY2018 Tracking On-Island/ Prepaid
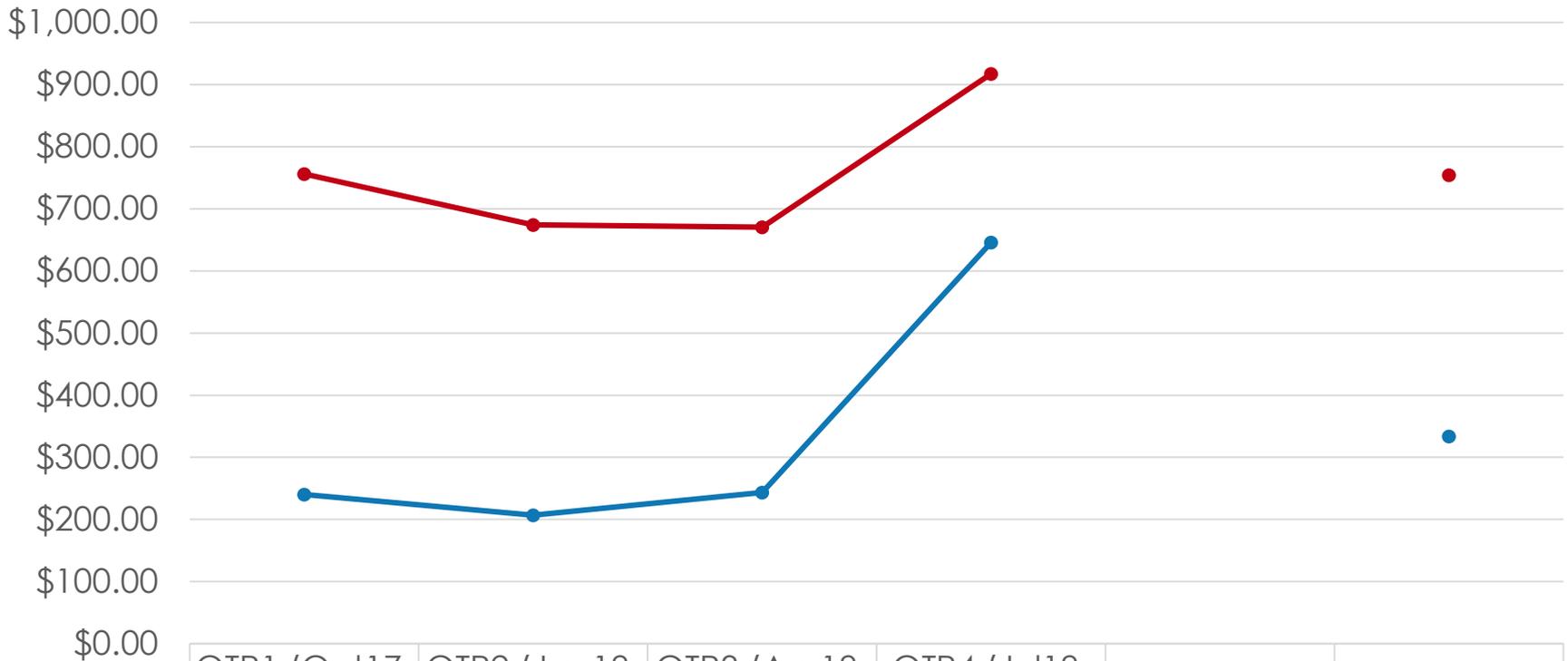
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
On-Island	$240.04	$206.86	$243.40	$646.02		$333.44
Prepaid	$756.22	$674.15	$670.41	$917.42		$754.38

[A]

On-Island Per Day Spending – FY2018 Tracking MEAN
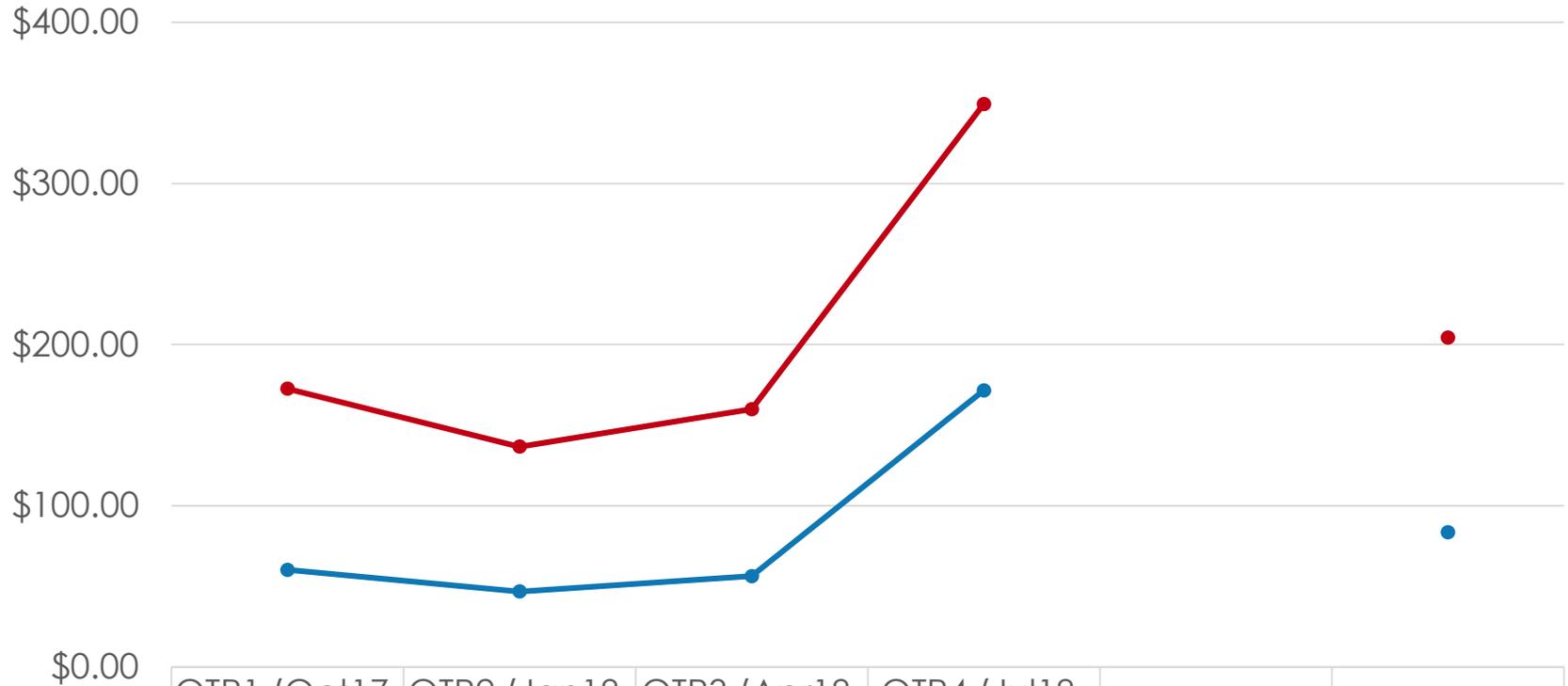
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
Per Person	$60.24	$46.79	$56.35	$171.60		$83.57
Travel Party	$172.58	$136.66	$159.88	$349.29		$204.39

[A]

On-Island Expenses by Category – MEAN Entire Travel Party

Chart values:
- F&B Hotel: $96.90
- F&B Fast Food/Conv Store: $70.80
- F&B Restaurant: $192.59
- Optional Tour: $133.45
- Gift- Self: $393.61
- Gift- Others: $155.19
- Local Trans: $76.86
- Other: $60.72

[A]

On-Island – FY2018 Tracking
Food & Beverage - Hotel

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$109.29	$68.05	$84.99	$96.90

[A]
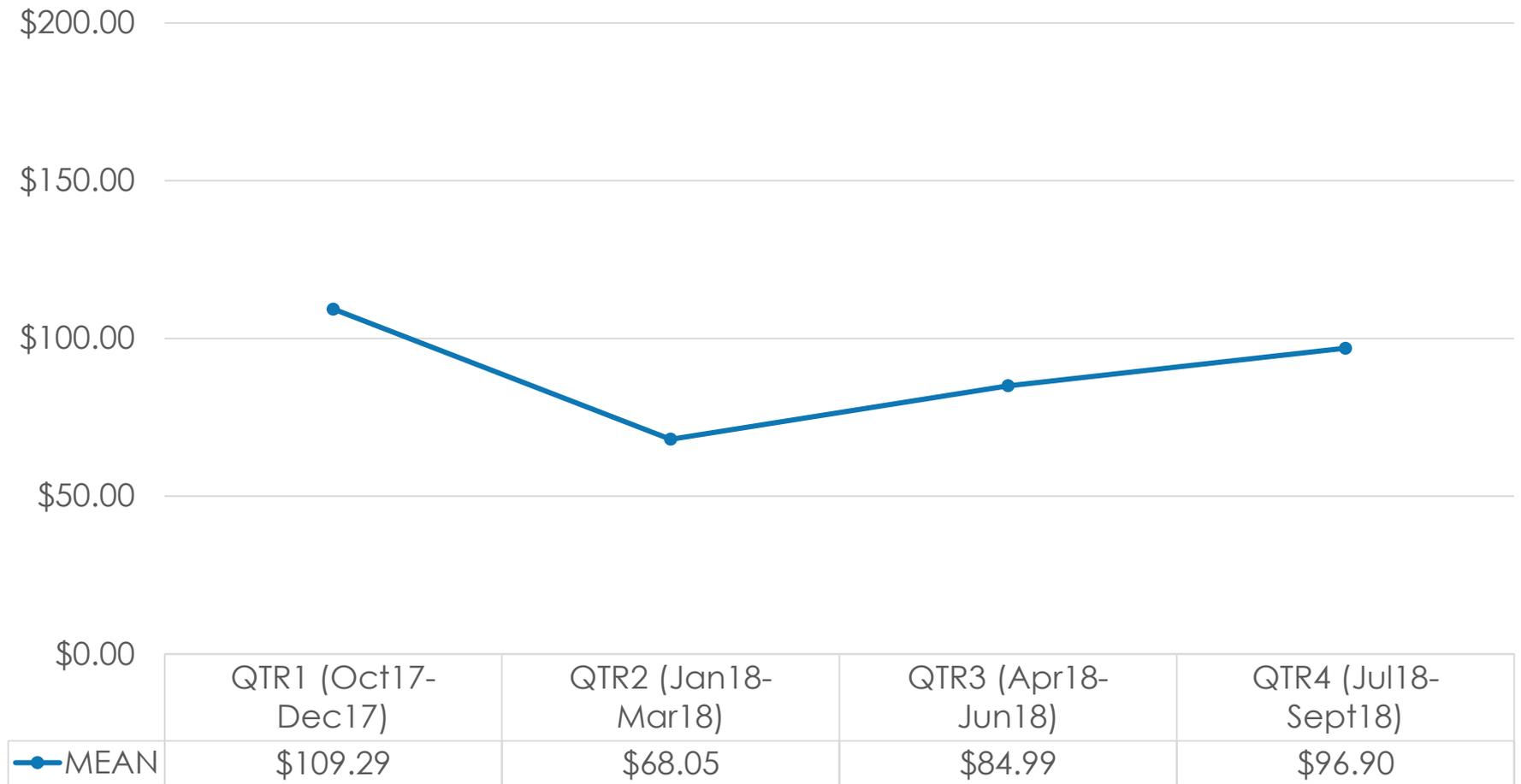
On-Island – FY2018 Tracking
Food & Beverage – Fast Food/ Convenience Store

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$61.02	$69.25	$63.90	$70.80

[A]
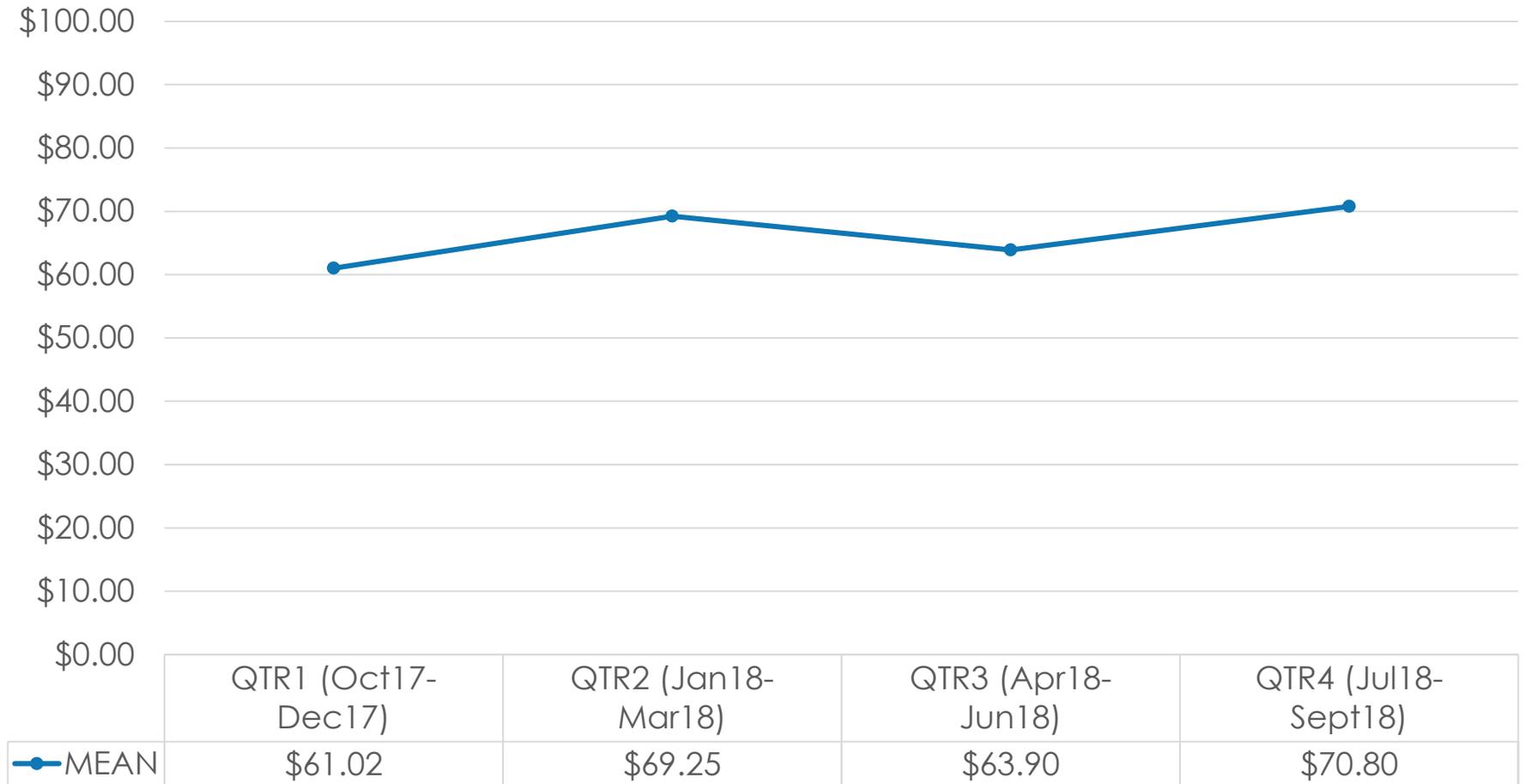
On-Island – FY2018 Tracking
Food & Beverage – Restaurant/ Drinking Est Outside Hotel

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$167.39	$144.15	$158.14	$192.59

[A]
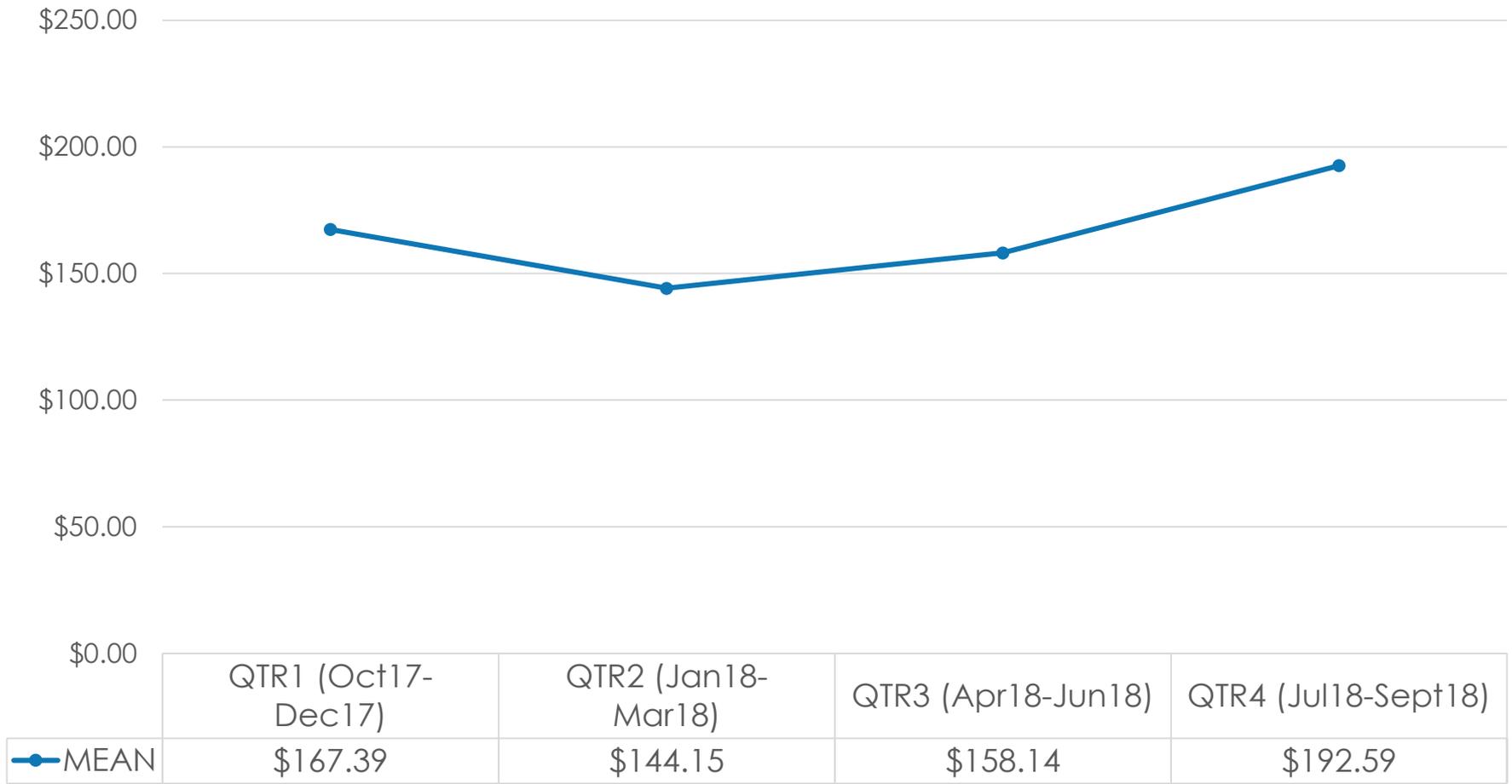
On-Island – FY2018 Tracking
Optional tour/ Activities

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$139.65	$91.20	$101.68	$133.45

[A]
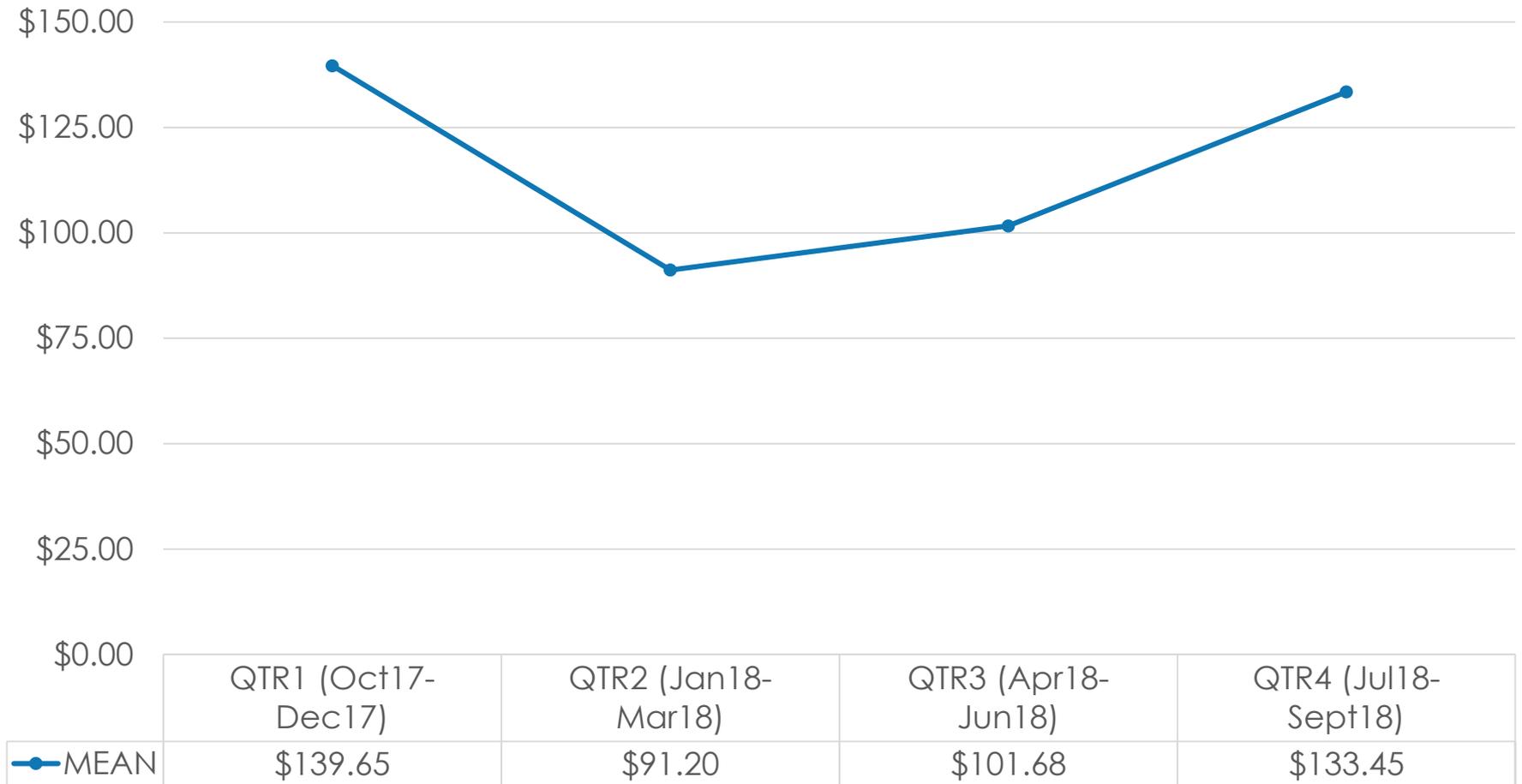
On-Island – FY2018 Tracking
Gift/ Souvenir – Self/ Companion

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$265.12	$217.88	$255.98	$393.61

[A]
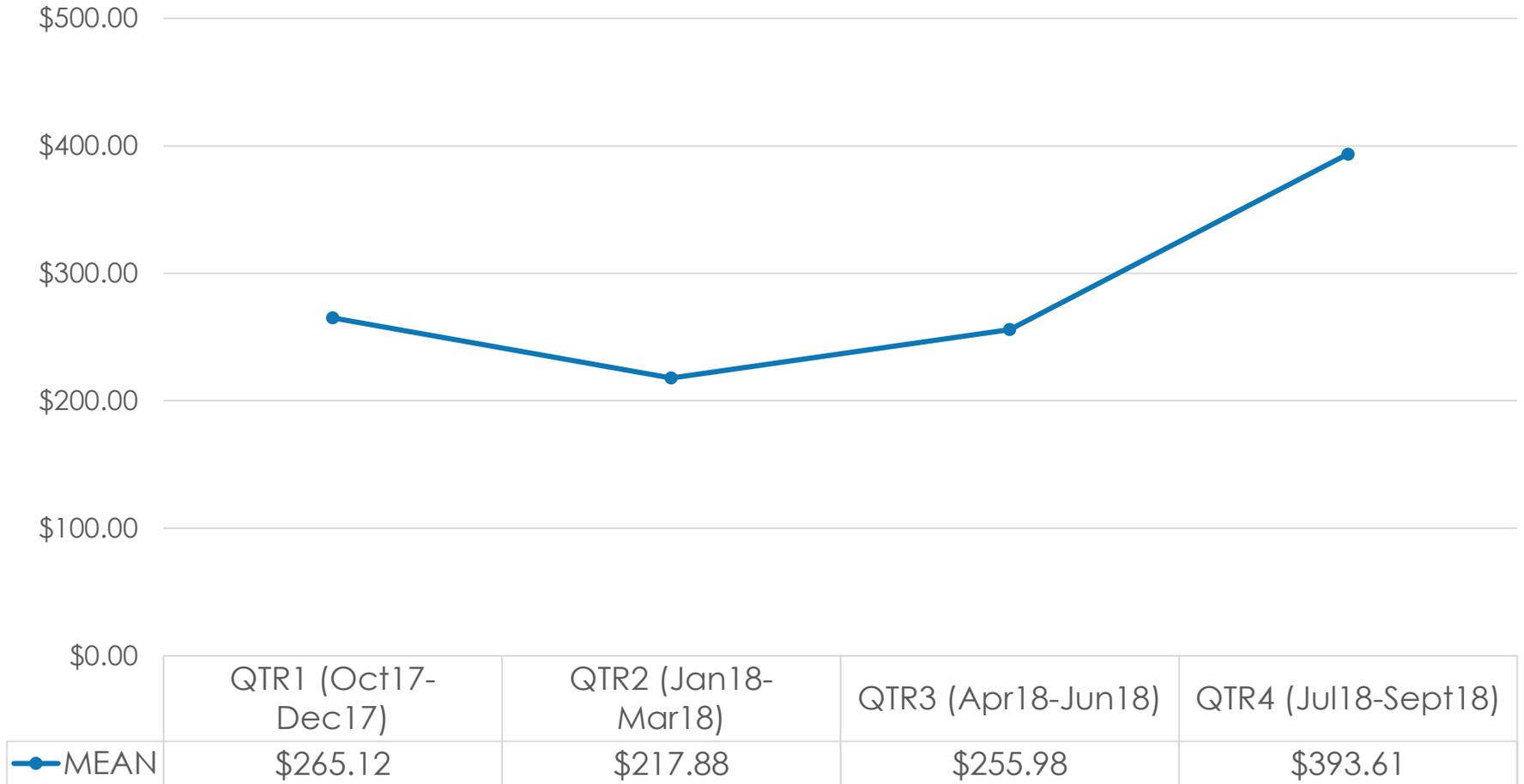
On-Island – FY2018 Tracking
Gift/ Souvenir – Friends/ Family

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$72.47	$78.68	$73.75	$155.19

[A]
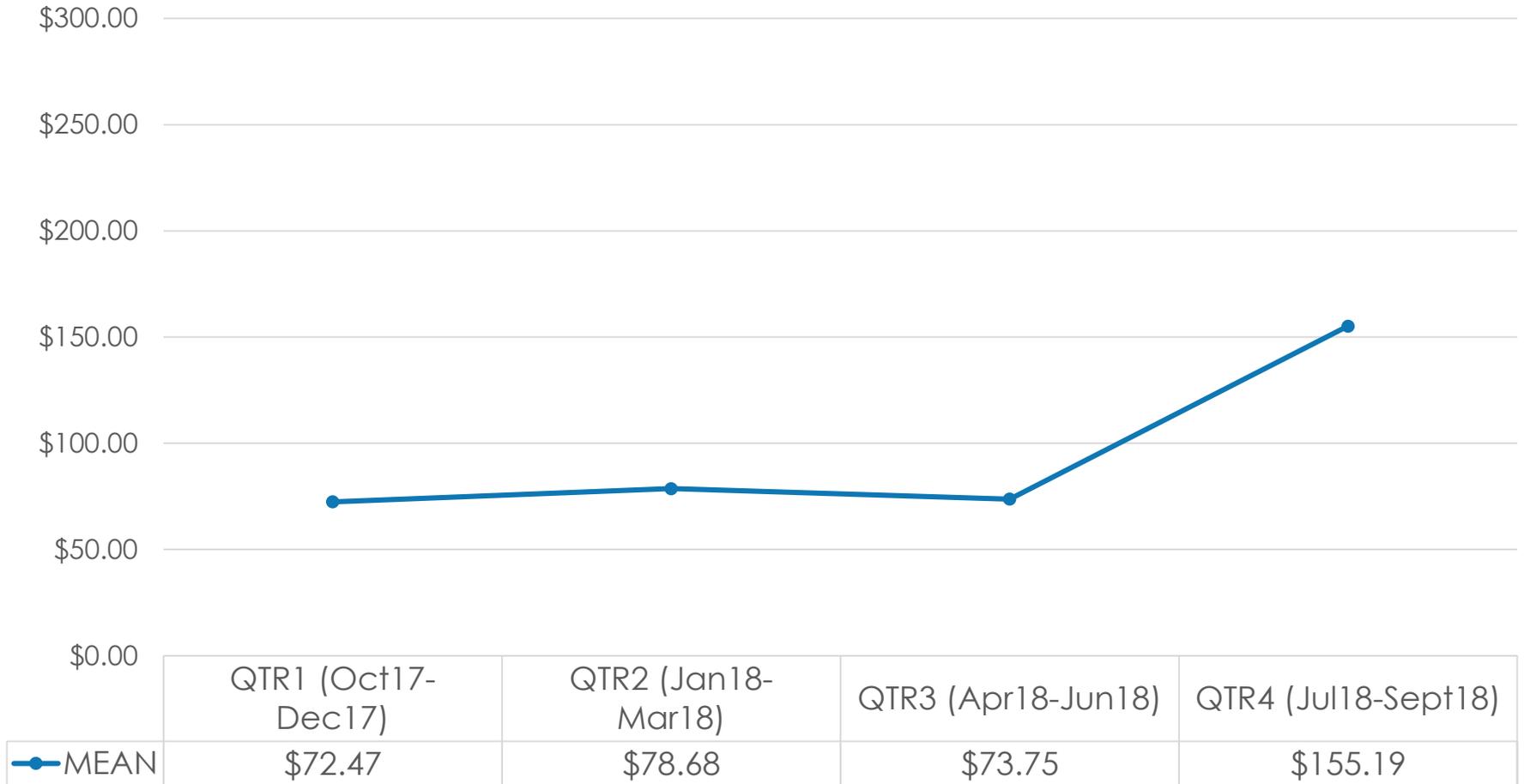
On-Island – FY2018 Tracking
Local Transportation

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$65.52	$31.44	$36.93	$76.86

[A]
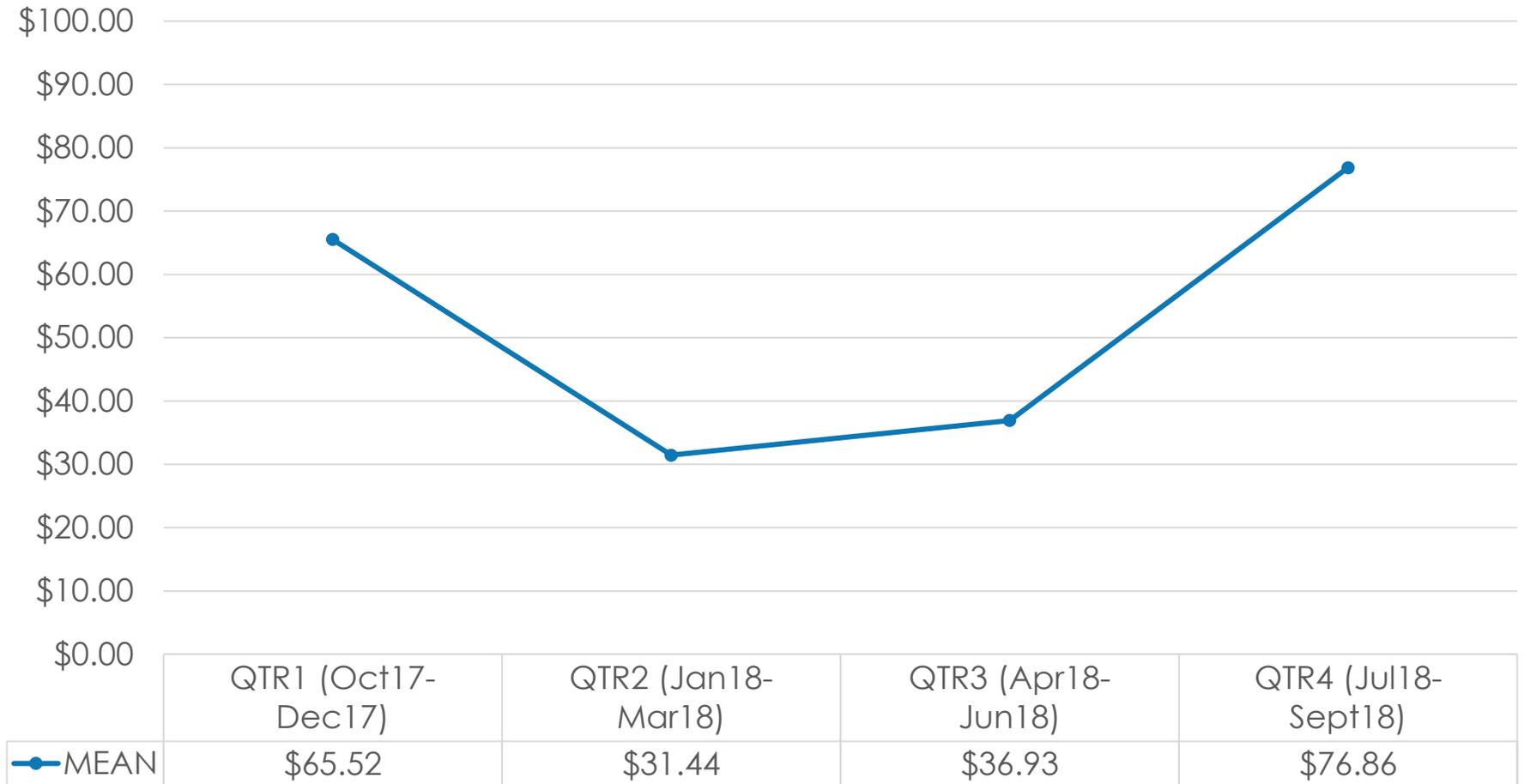
On-Island – FY2018 Tracking
Other Not Included

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$23.04	$11.00	$15.71	$60.72

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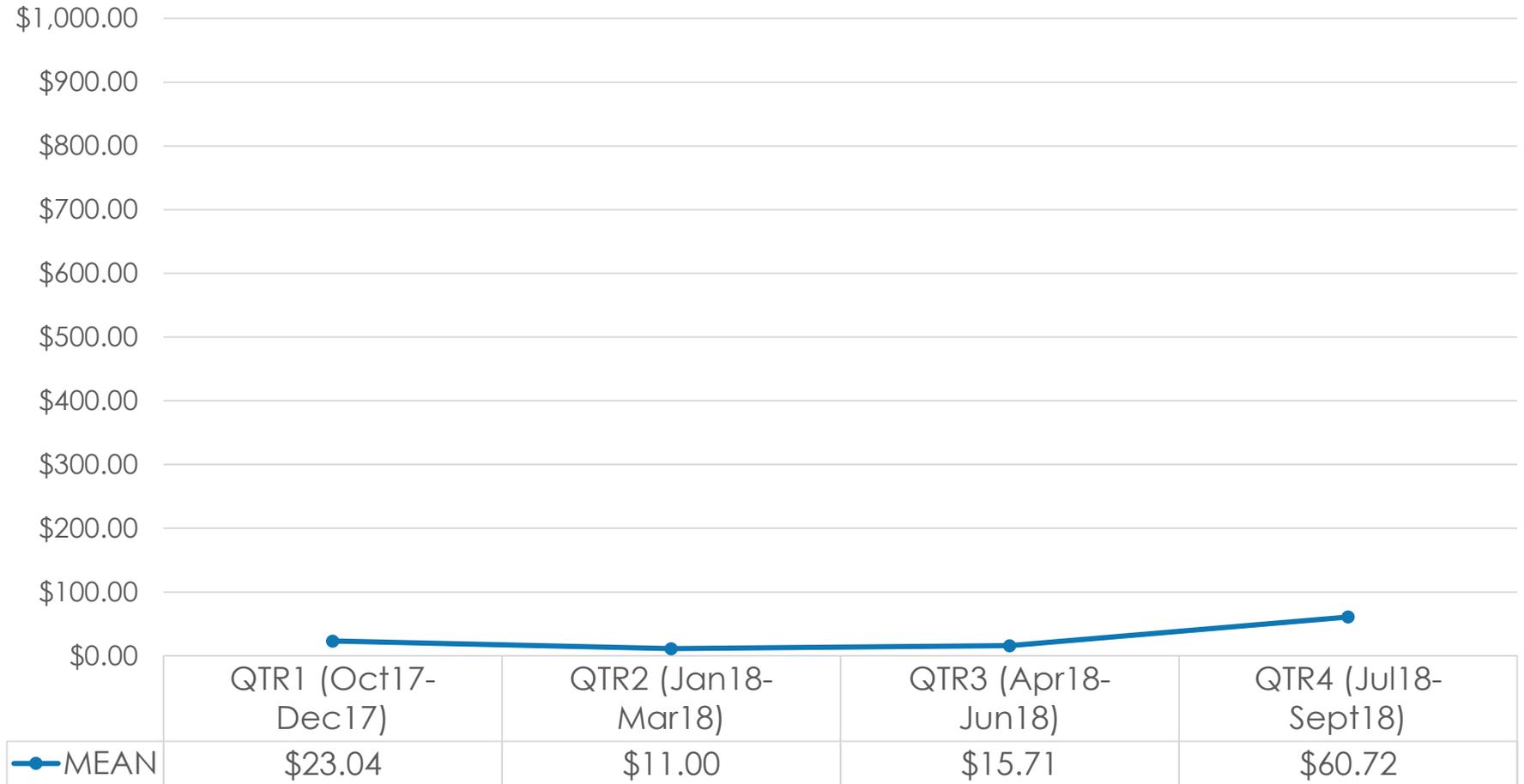
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- $1,563.89 = TOTAL Per Person Expenditure

[A]

TOTAL Per Person Expenditures – FY2018 Tracking
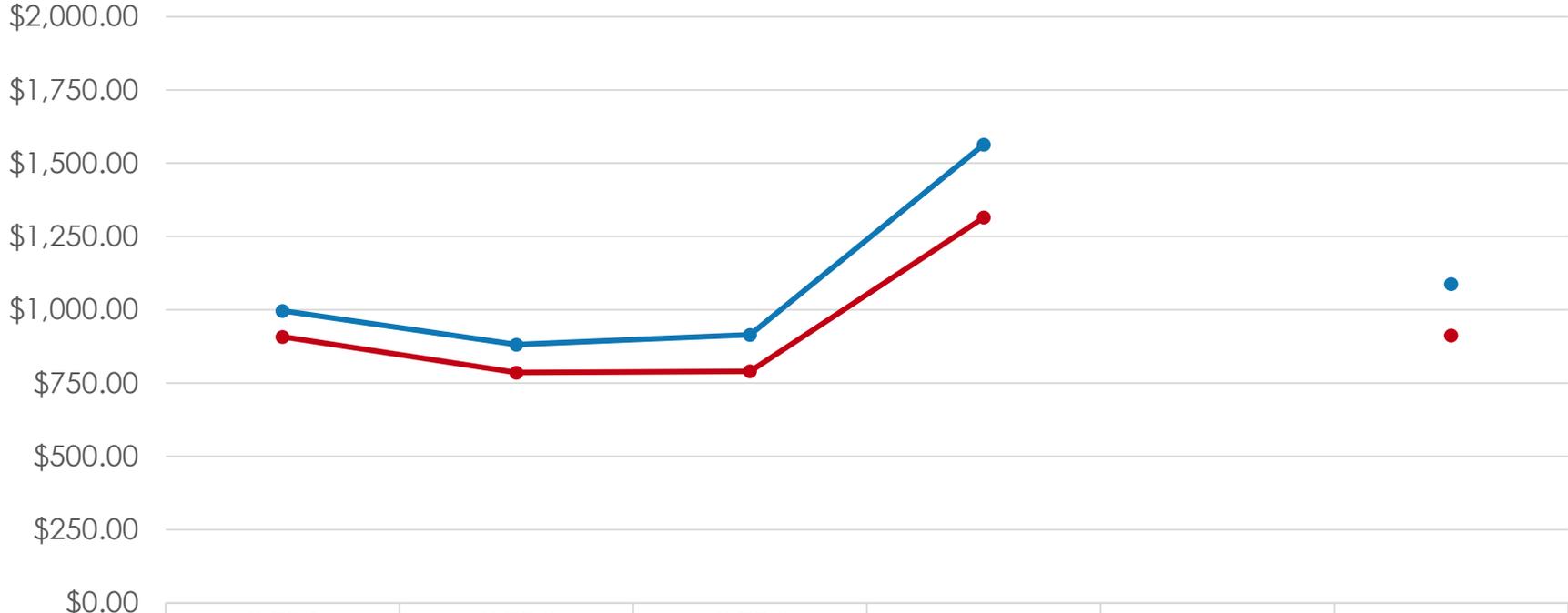
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	$996.26	$881.20	$914.68	$1,563.89		$1,088.17
MEDIAN	$908.00	$786.00	$790.00	$1,315.00		$913.00

[A]

TOTAL Per Person Expenditures – Key Segments

GVB EXIT SURVEY
TOTAL- PER PERSO

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
TOTAL PP	Mean	$1,563.89	$1,124.96	$2,022.20	$3,234.31	$1,557.30	$1,521.52	$1,426.07	$1,544.04	$1,576.50
	Median	$1,315	$1,125	$1,934	$1,858	$1,311	$1,197	$1,163	$1,311	$1,292

Prepared by Anthology Research

[A]

GUAM AIRPORT EXPENDITURE – FY2018 Tracking

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$56.04	$64.02	$62.72	$138.79

[A]
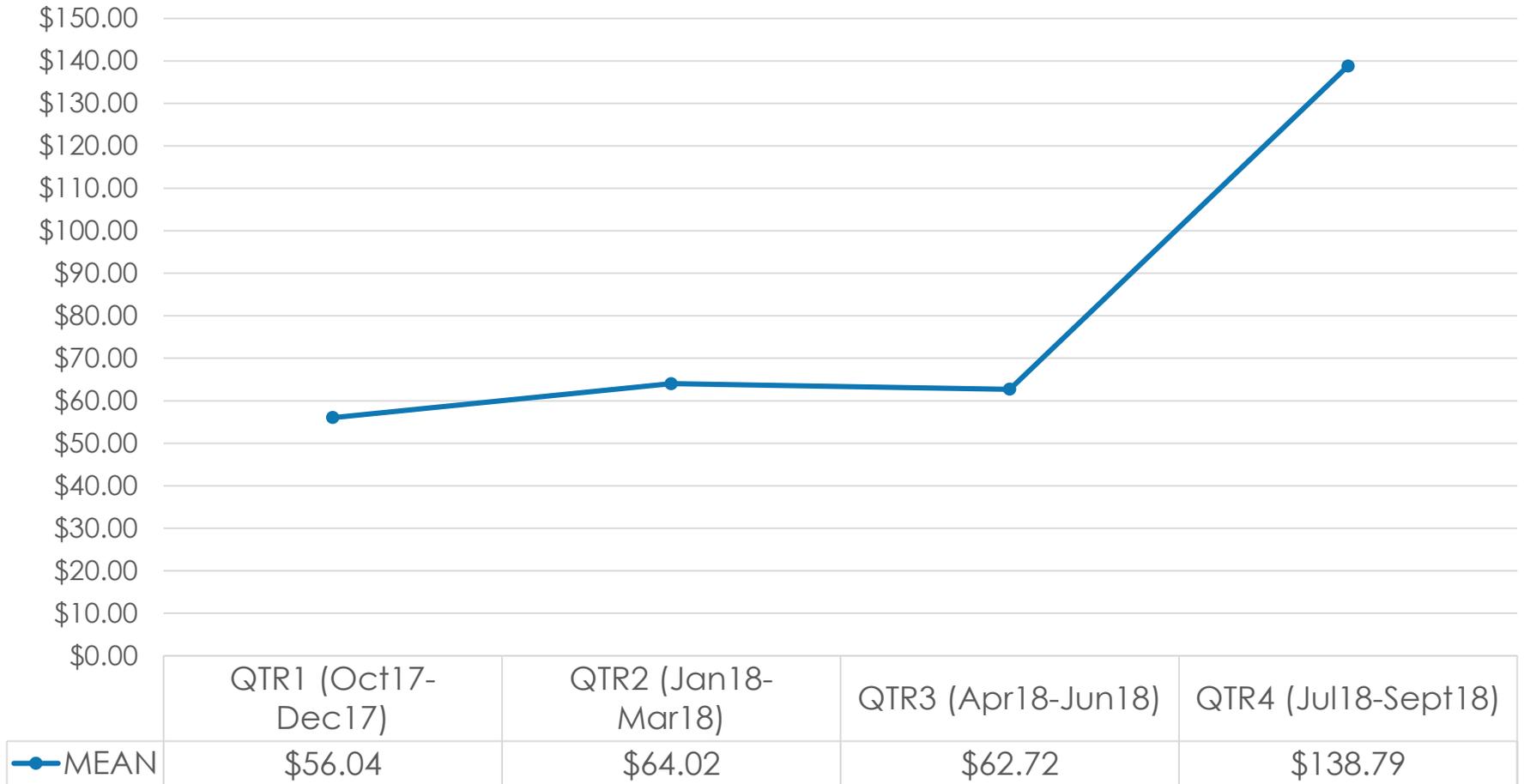
SECTION 4
VISITOR SATISFACTION
BEHAVIOR

[A]

OVERALL SATISFACTION

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

[A]

POSITIVE ASPECT OF TRIP

Aspect	Percentage
Beach/ Ocean	22%
Natural beauty	20%
Hotel/ accommodation	12%
Relaxing	12%
Shopping	11%
Pkg tour/ activity	7%
Friendly/ Warm ppl	6%
Weather	3%
Event- participate	2%
Event- family	1%

[A]

NEGATIVE ASPECT OF TRIP

Category	Percentage
Nothing	28%
Expensive/ Cost	16%
Food- variety	8%
Food- quality	8%
Accommodations- clean	7%
Activities- variety	5%
Lack local culture	5%
Customer service	2%
Ground trans	2%
Driving exp	2%

0%   5%   10%   15%   20%   25%   30%

[A]
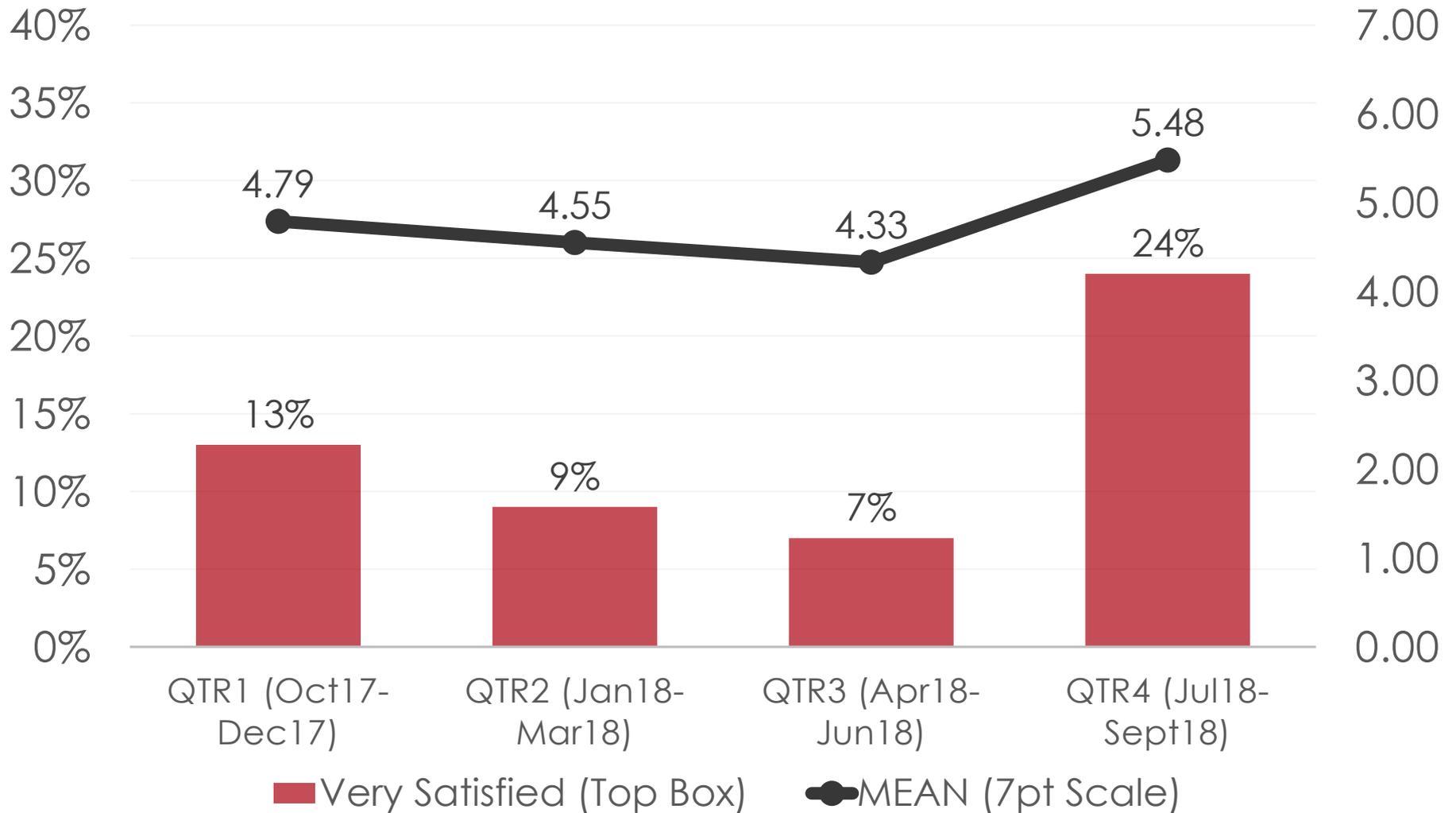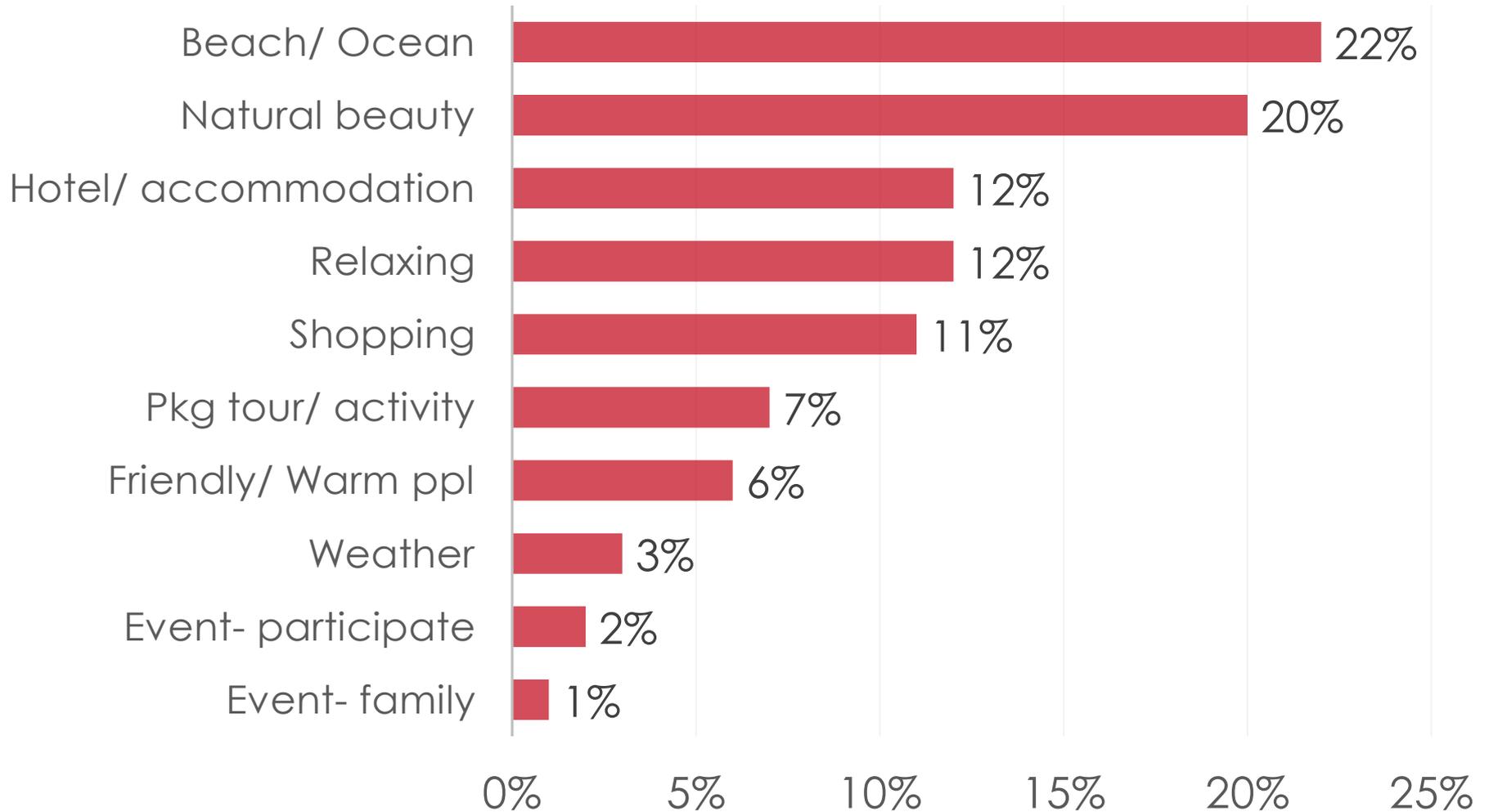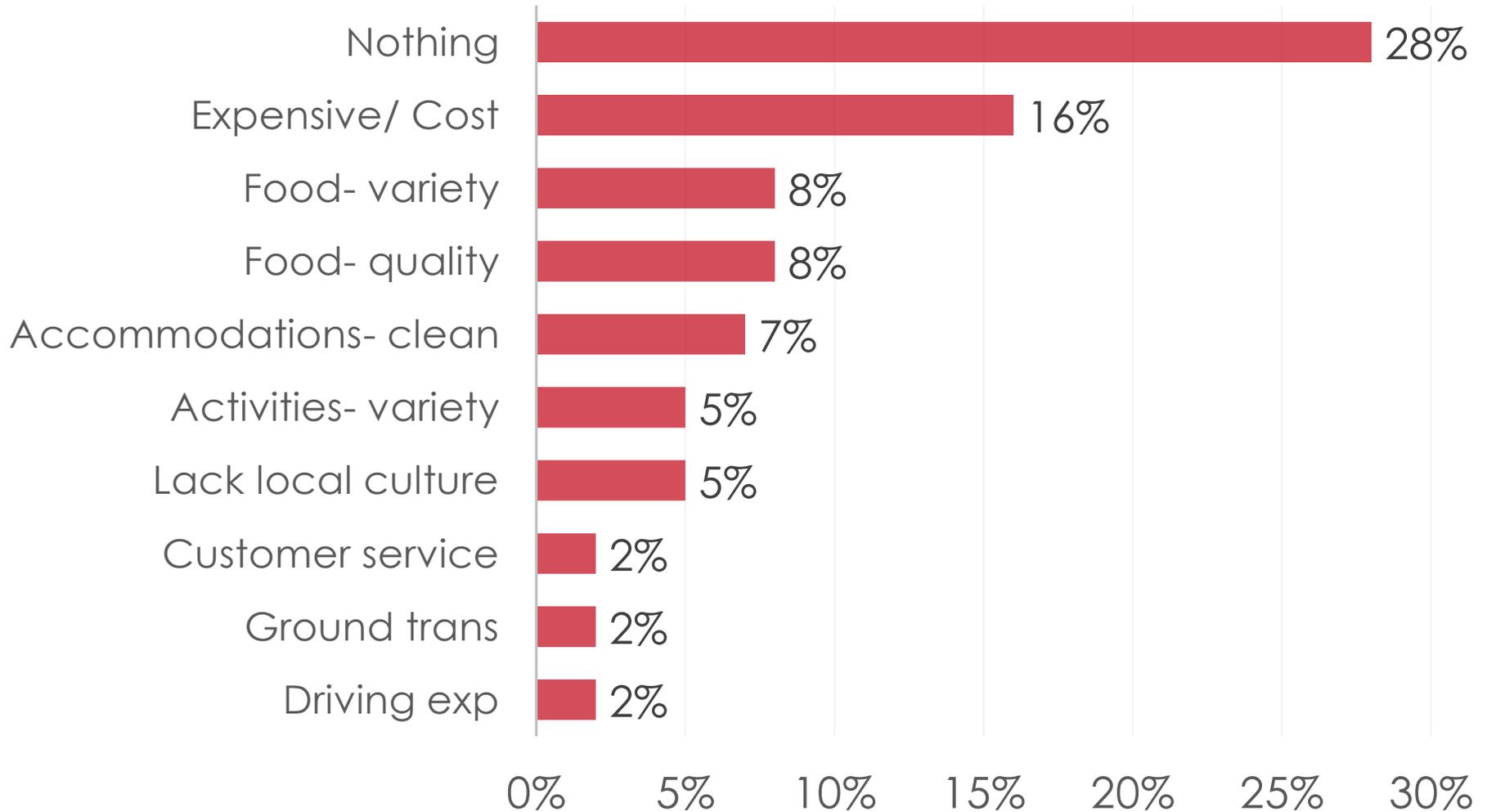
Guam was better than expected
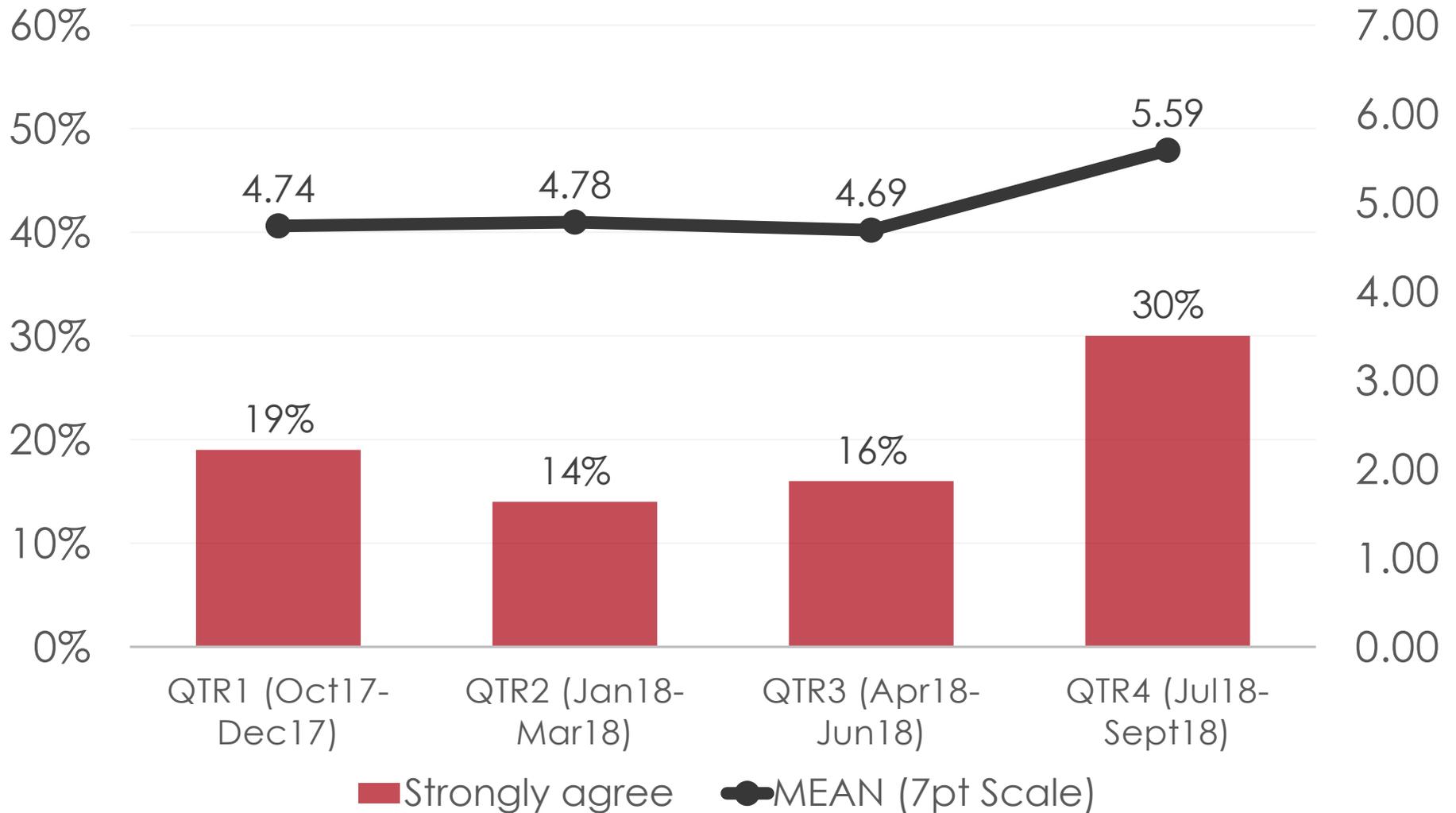
I had no communication problems

QTR1 (Oct17-Dec17): 8%, 4.62
QTR2 (Jan18-Mar18): 6%, 4.96
QTR3 (Apr18-Jun18): 7%, 5.20
QTR4 (Jul18-Sept18): 19%, 5.19

Legend: Strongly agree — MEAN (7pt Scale)

[A]
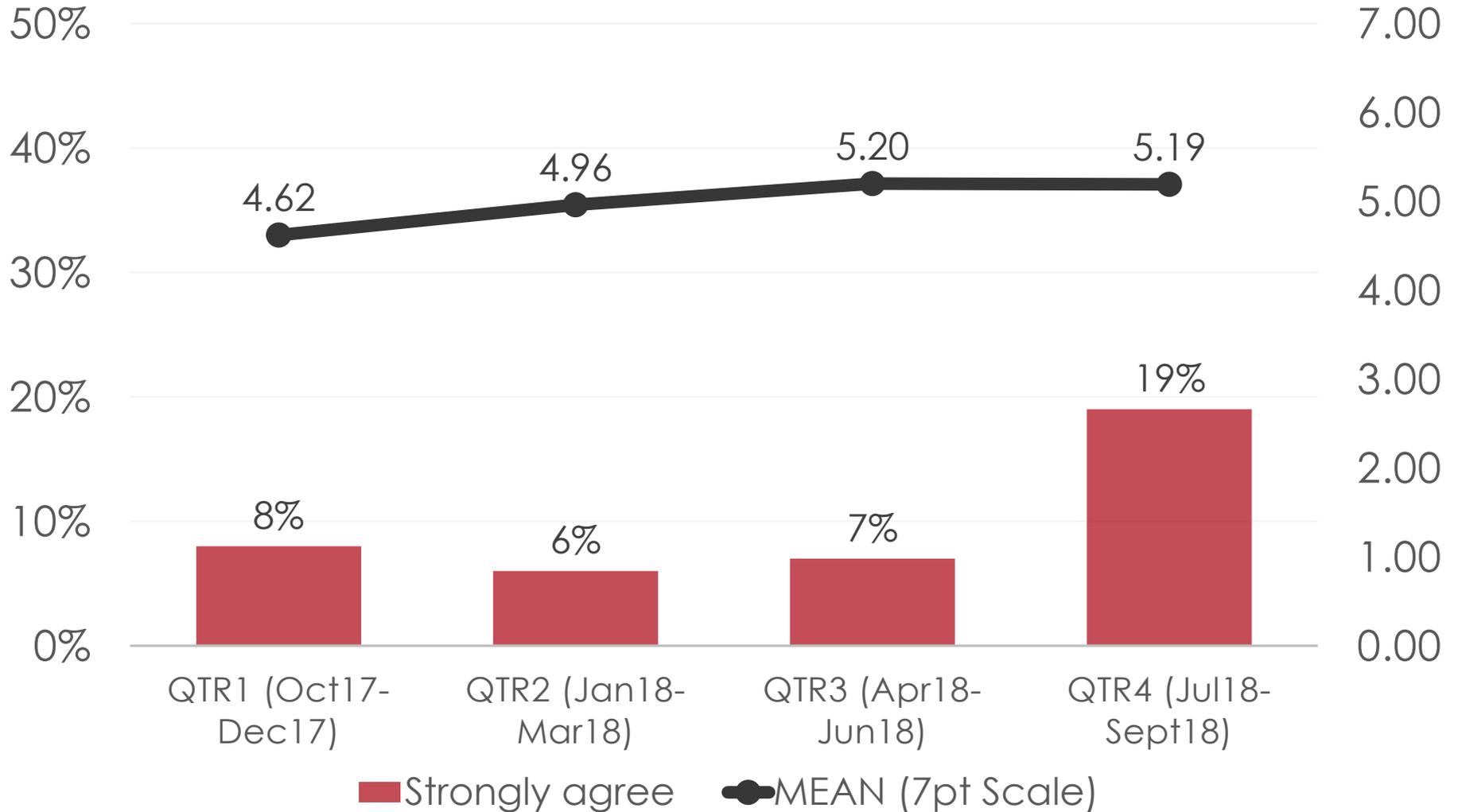
Recommend Guam - family & friends

QTR1 (Oct17-Dec17) QTR2 (Jan18-Mar18) QTR3 (Apr18-Jun18) QTR4 (Jul18-Sept18)

6.97   7.47

30%   38%

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

75
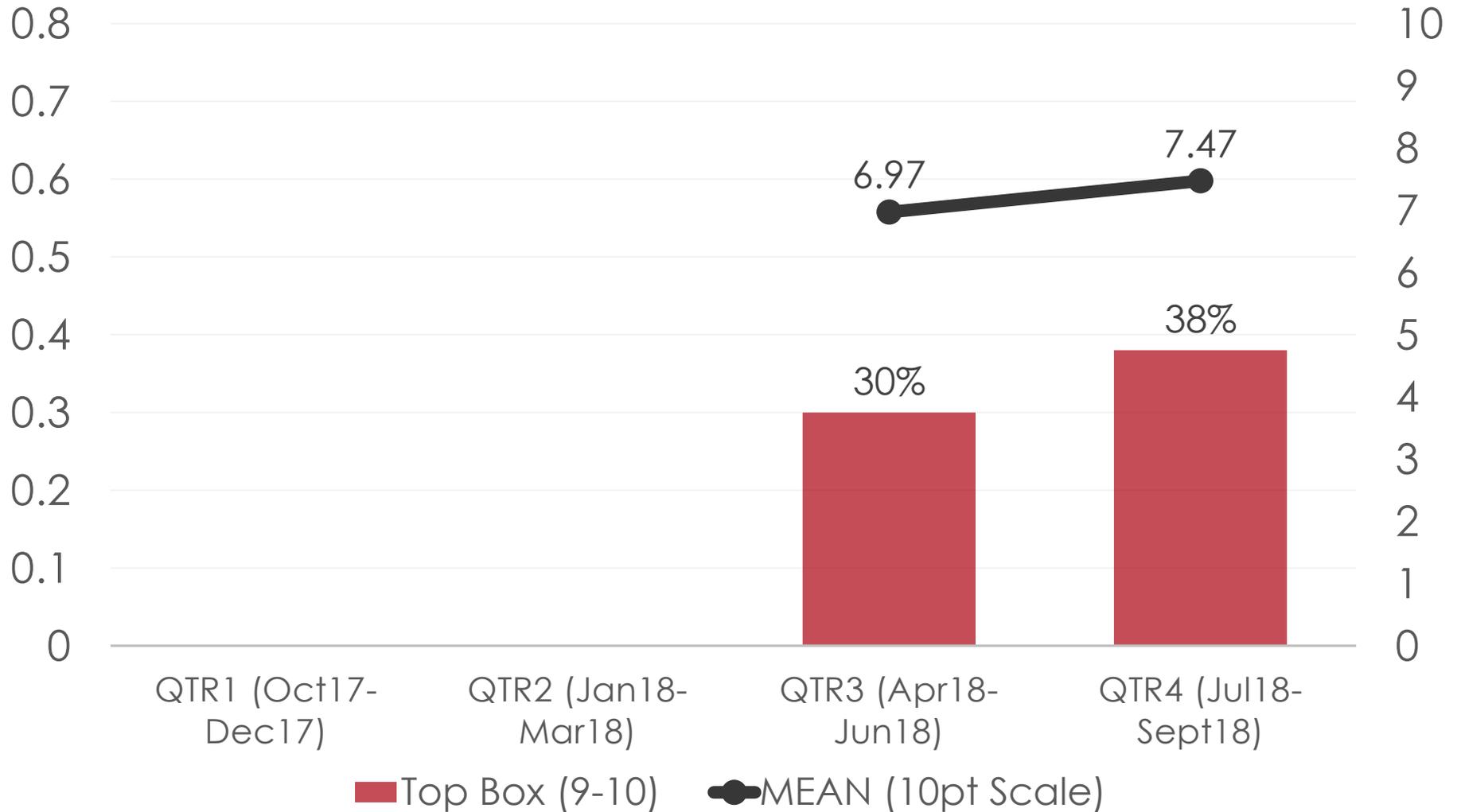
Sites on Guam were attractive

Legend: Strongly agree | MEAN (7pt Scale)

[A]
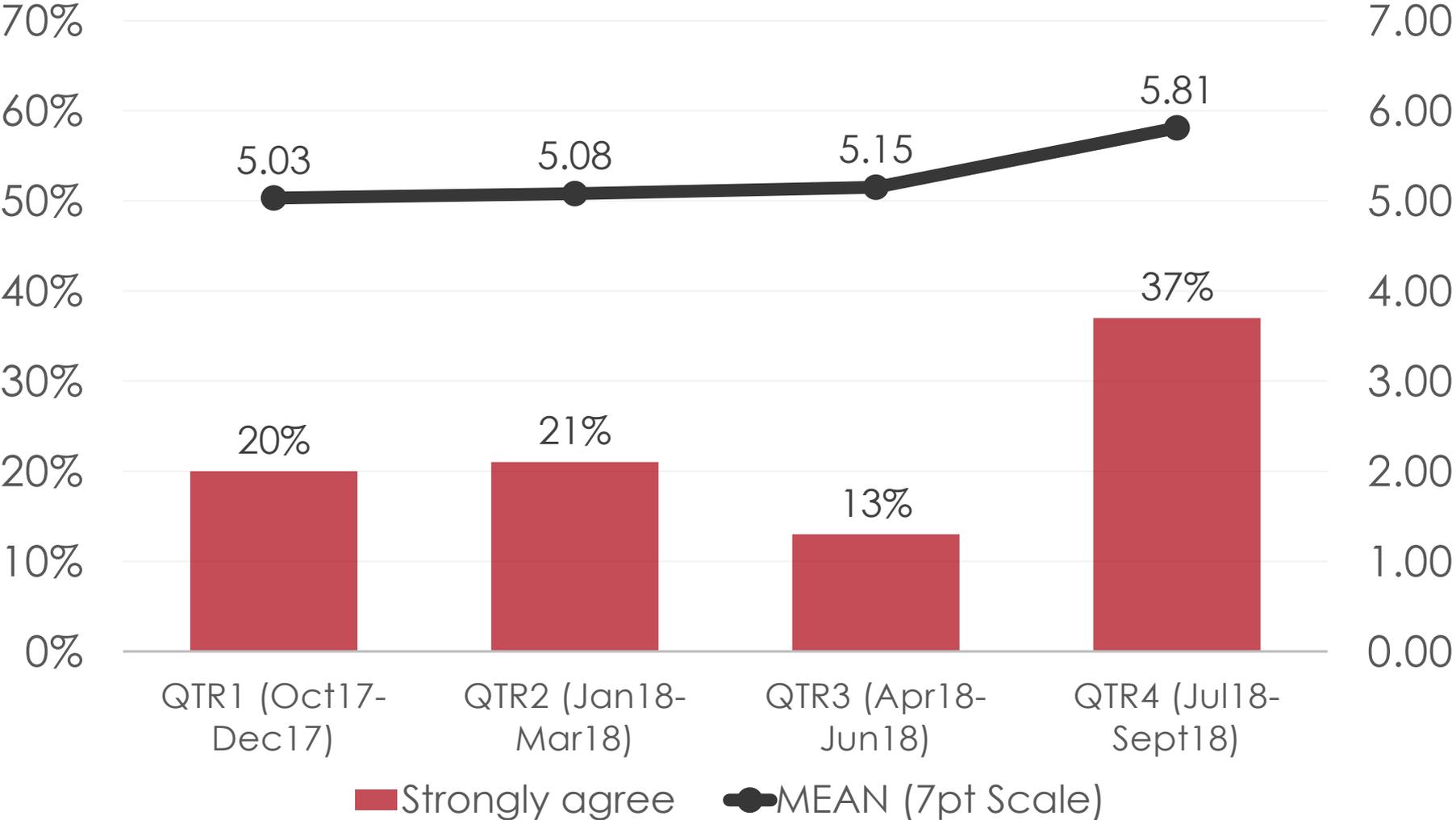
I plan to visit Guam again

- Strongly agree
- MEAN (7pt Scale)

QTR1 (Oct17-Dec17): 22%, 4.81
QTR2 (Jan18-Mar18): 28%, 5.20
QTR3 (Apr18-Jun18): 16%, 5.01
QTR4 (Jul18-Sept18): 31%, 5.51

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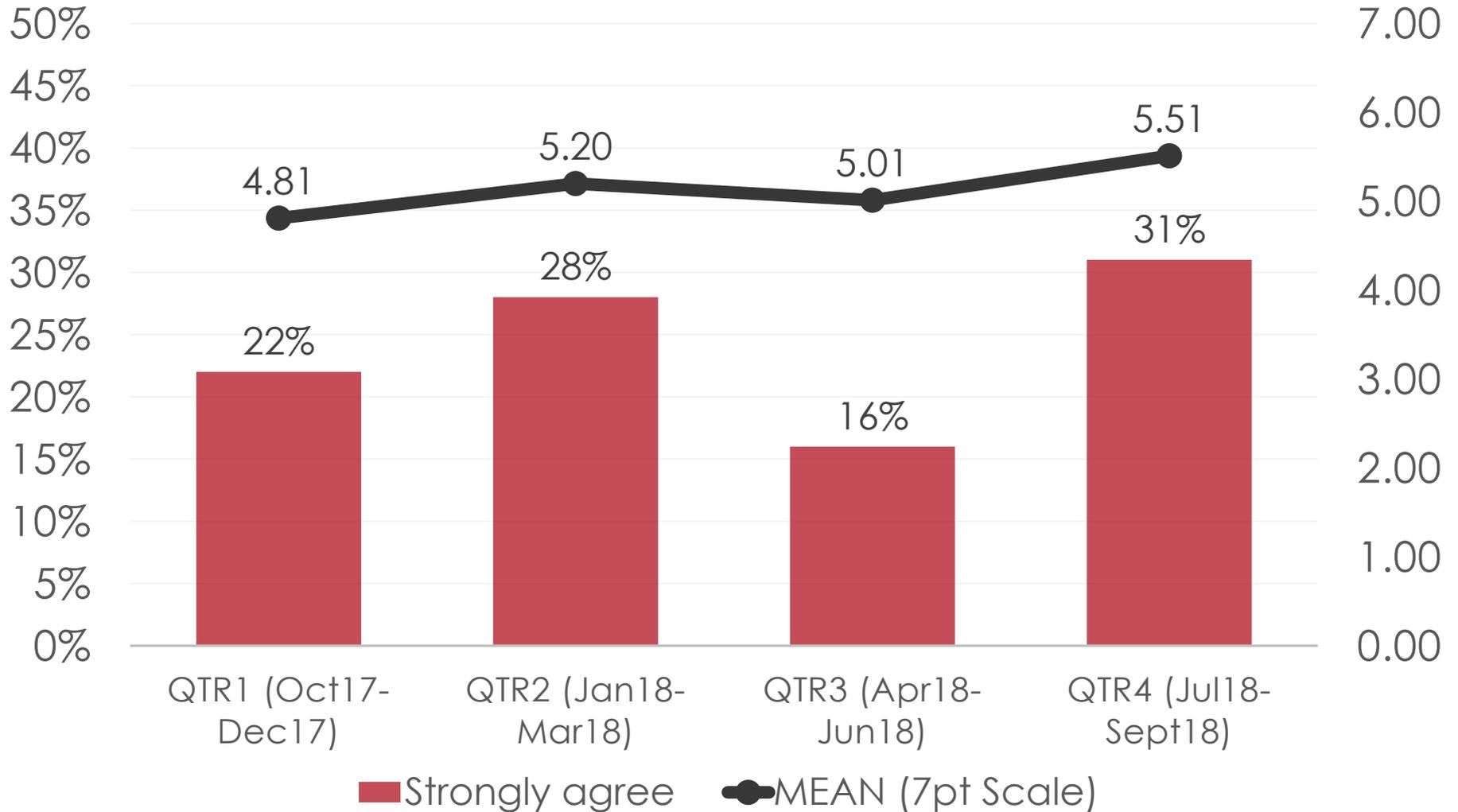
Not enough night time activities
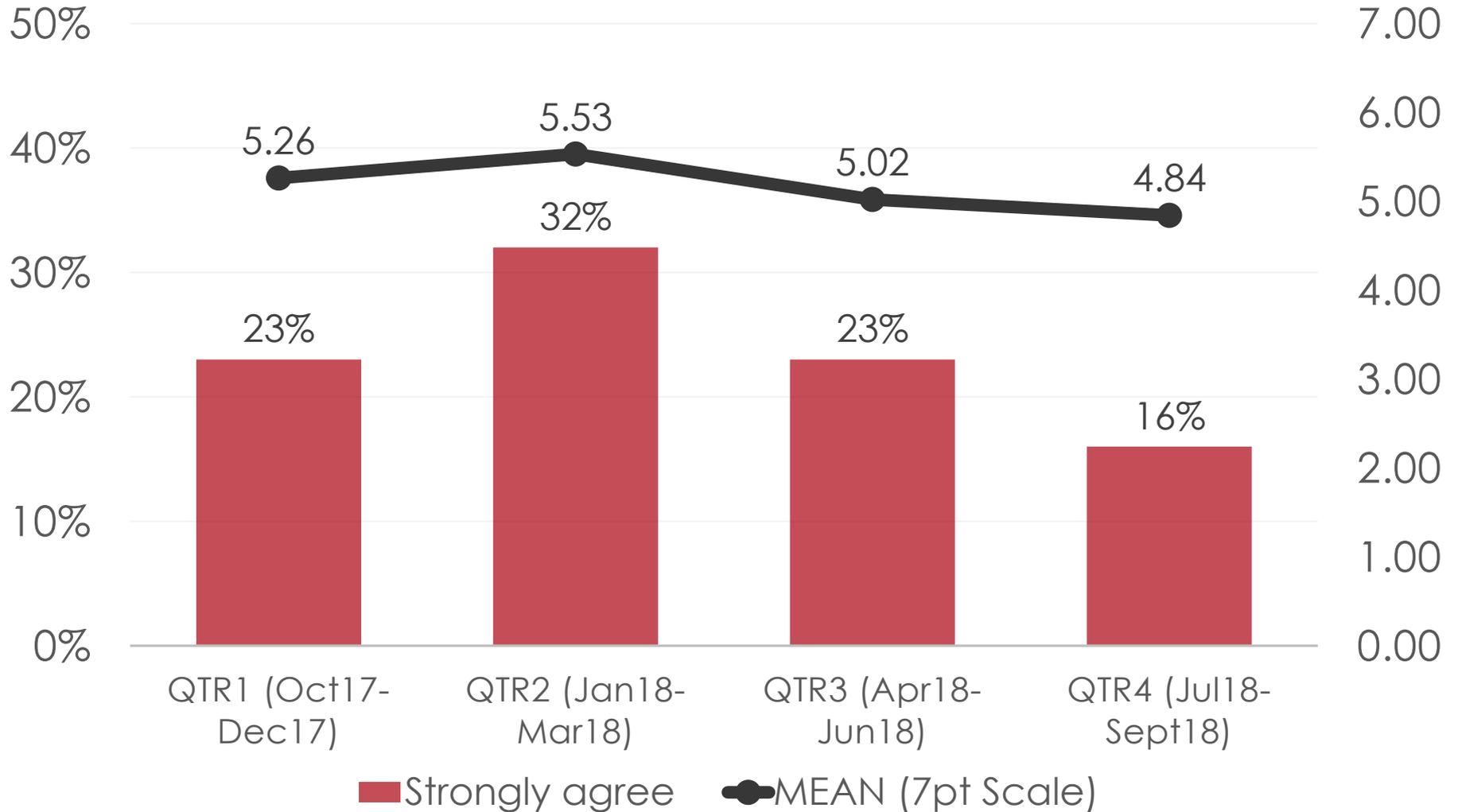
Tour guides were professional

Tour drivers were professional

5.49   5.36   5.54   5.43

25%   19%   22%   29%

QTR1 (Oct17-Dec17)   QTR2 (Jan18-Mar18)   QTR3 (Apr18-Jun18)   QTR4 (Jul18-Sept18)

■ Strongly agree   ●— MEAN (7pt Scale)

[A]
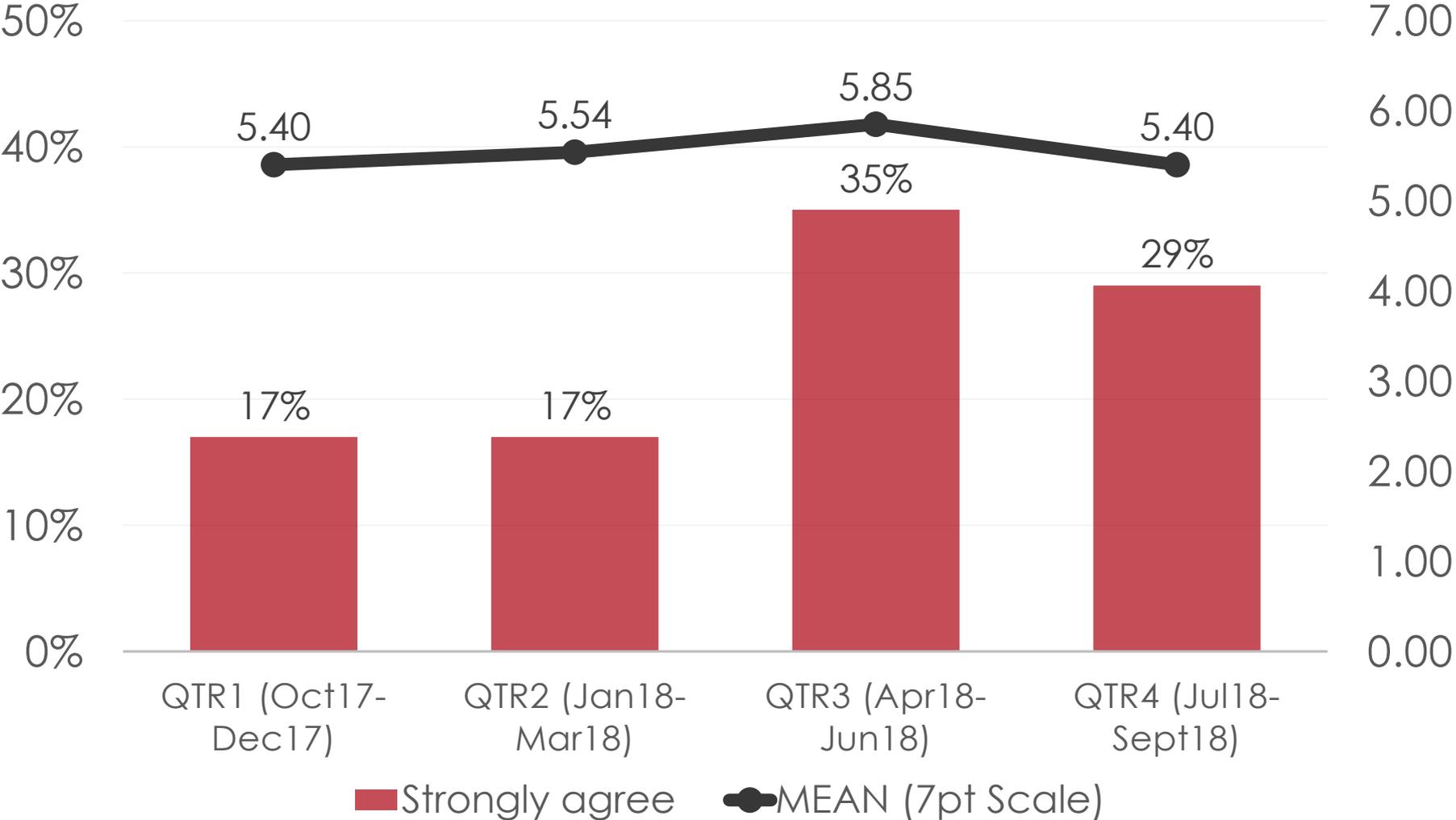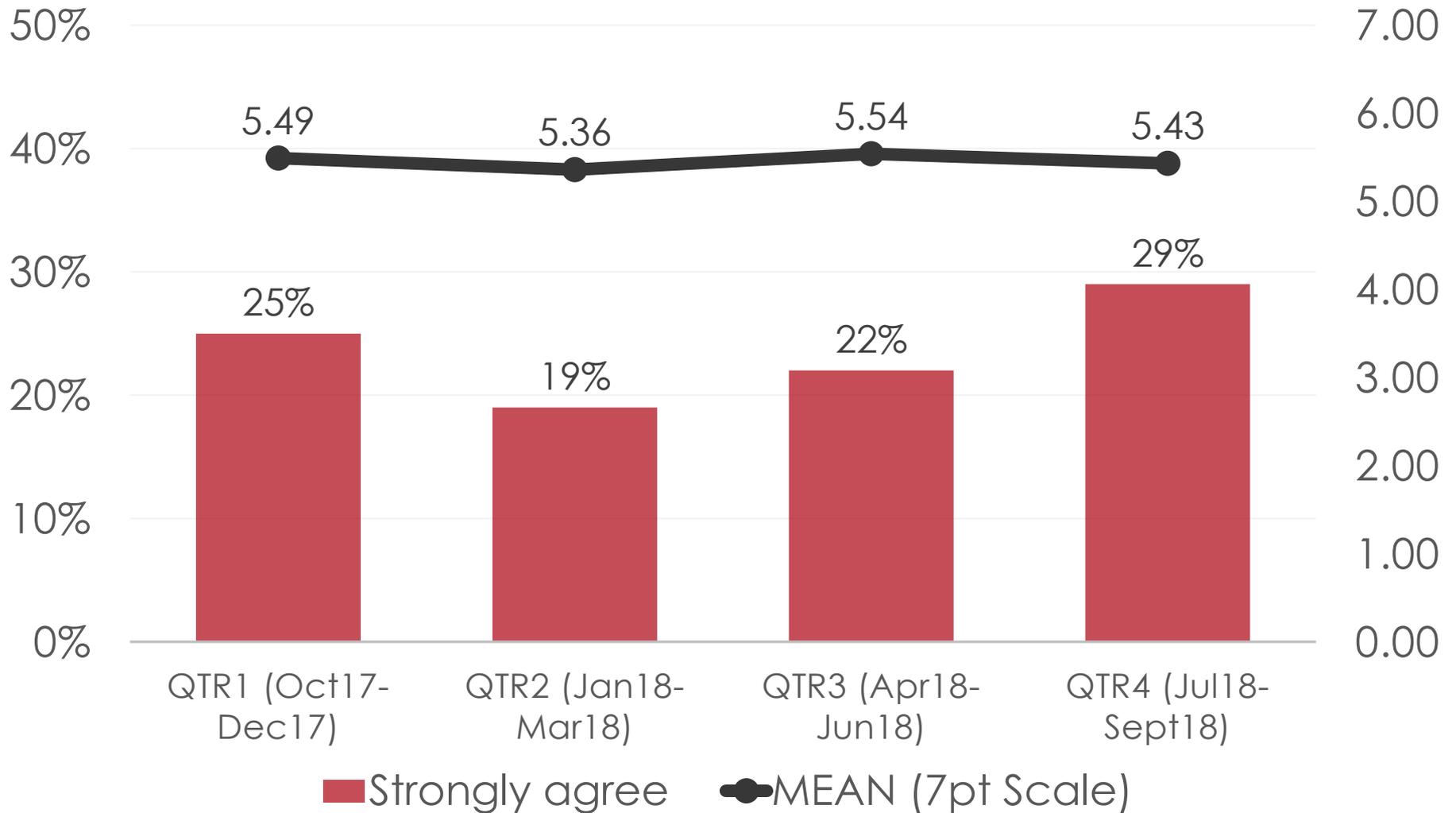
Taxi drivers were professional

Taxis were clean
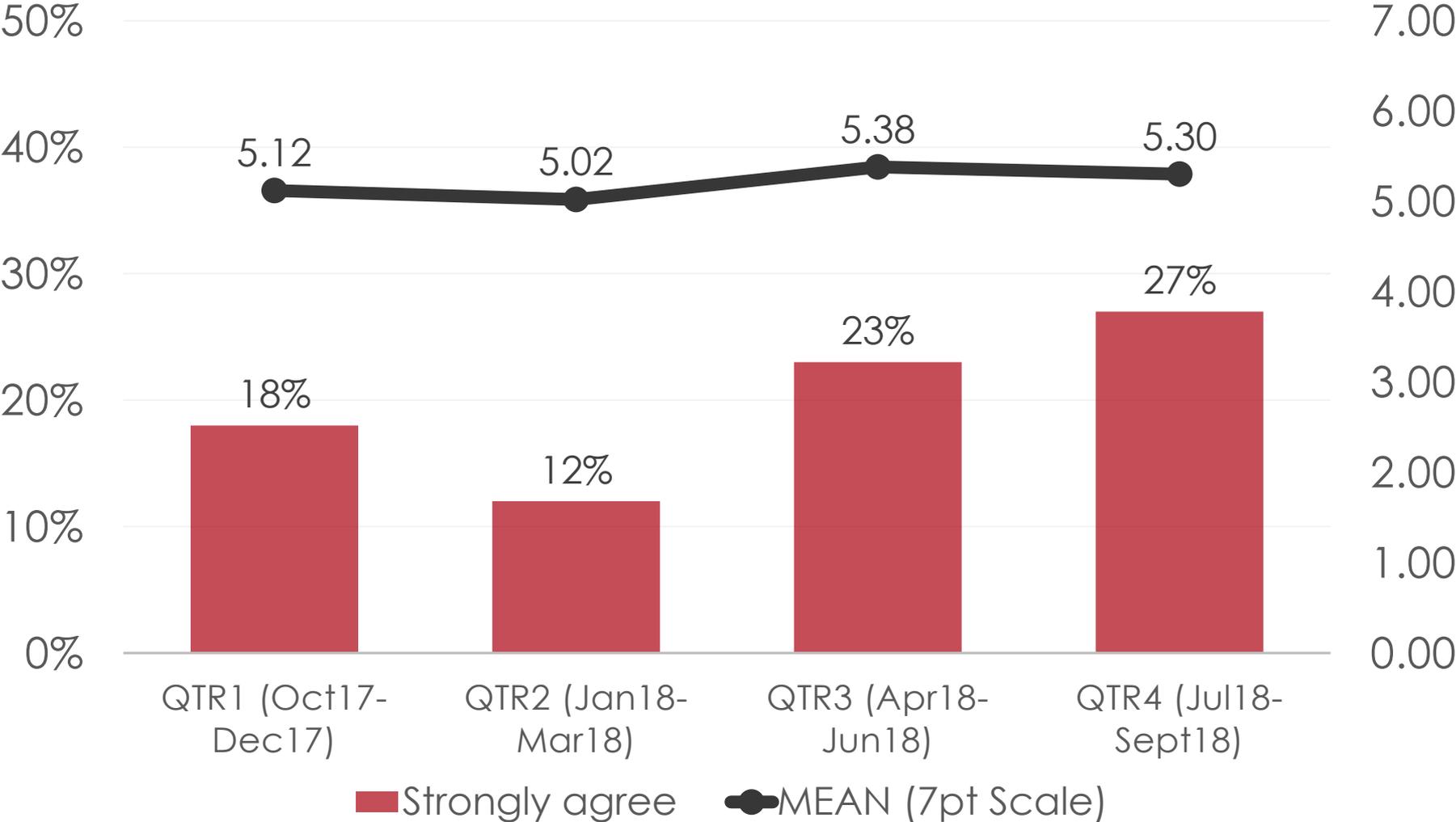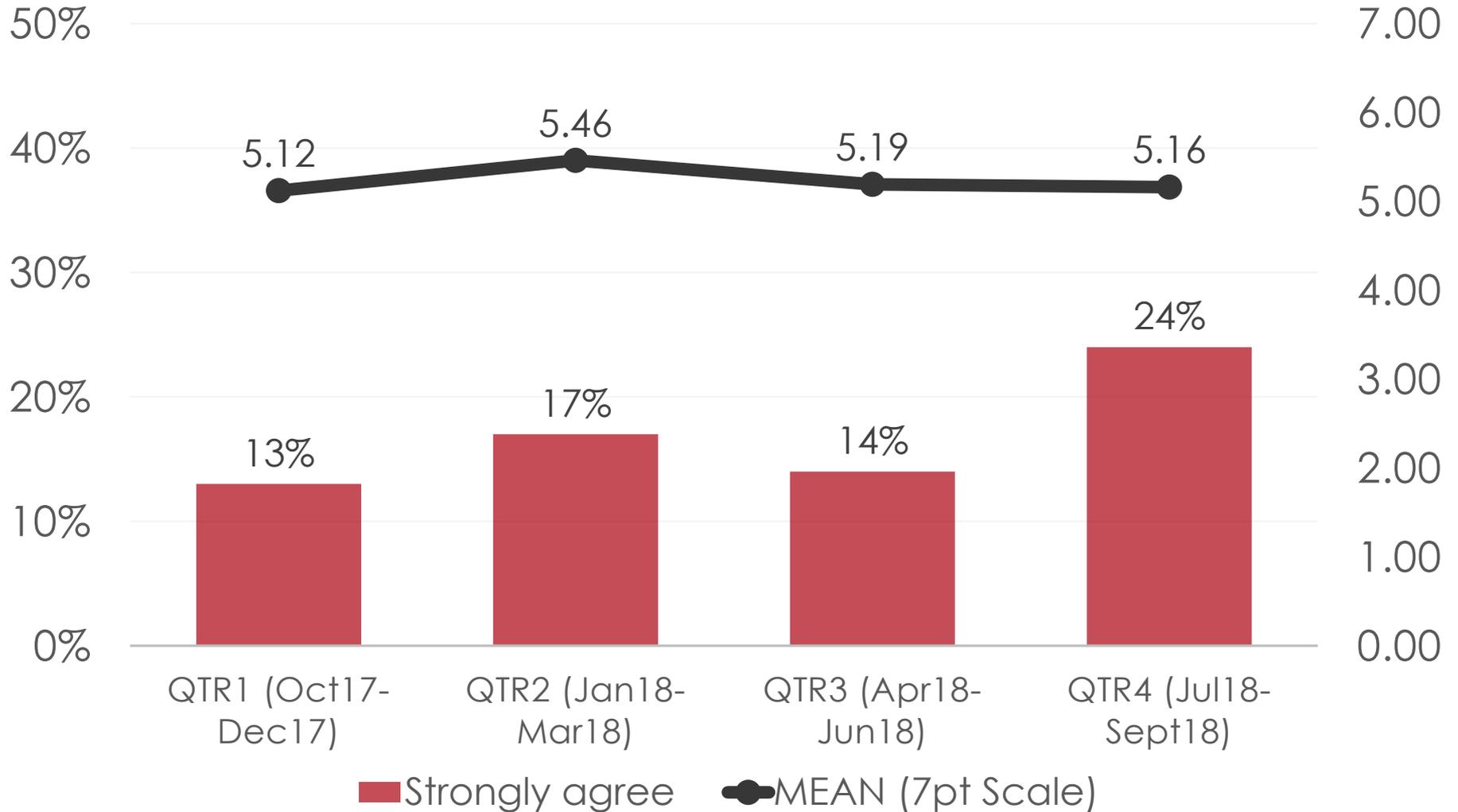
50%
40%
30%
20%
10%
0%

7.00
6.00
5.00
4.00
3.00
2.00
1.00
0.00

5.12   5.02   5.38   5.30

18%   12%   23%   27%

QTR1 (Oct17-Dec17)   QTR2 (Jan18-Mar18)   QTR3 (Apr18-Jun18)   QTR4 (Jul18-Sept18)

■ Strongly agree   ●—MEAN (7pt Scale)

82

[A]

Guam airport was clean

83

Ease of getting around

[A]

Safety walking around at night

4.73   4.64   4.83   5.04

16%

7%   5%   5%

QTR1 (Oct17-Dec17)   QTR2 (Jan18-Mar18)   QTR3 (Apr18-Jun18)   QTR4 (Jul18-Sept18)

■ Very Satisfied   ━●━ MEAN (7pt Scale)

[A]

Price of things on Guam

60%
50%
40%
30%
20%
10%
0%

5.20   5.18   4.87   4.75

15%   13%   10%   15%

QTR1 (Oct17-Dec17)   QTR2 (Jan18-Mar18)   QTR3 (Apr18-Jun18)   QTR4 (Jul18-Sept18)

7.00
6.00
5.00
4.00
3.00
2.00
1.00
0.00

■ Very Satisfied   ━●━ MEAN (7pt Scale)

[A]
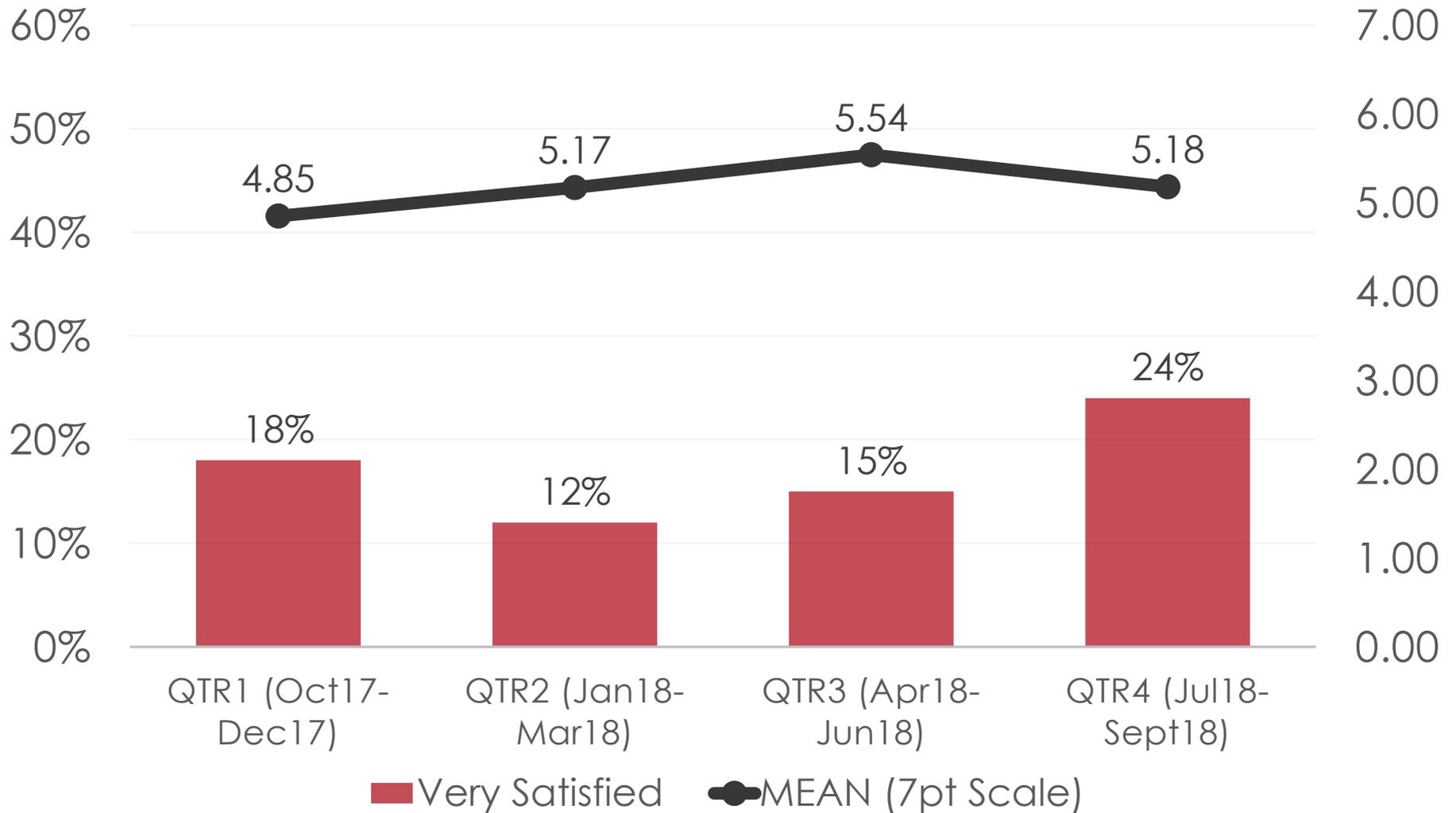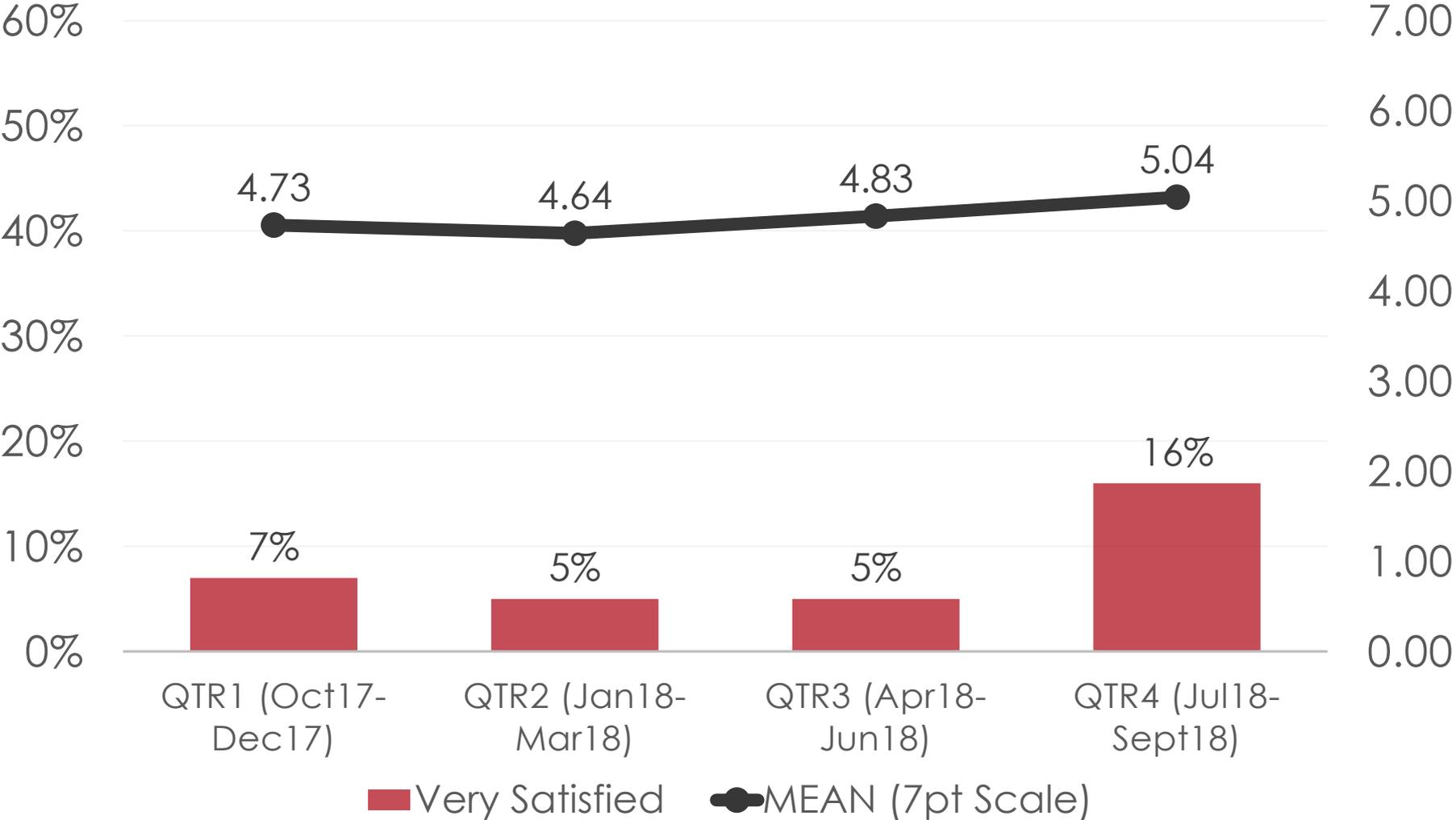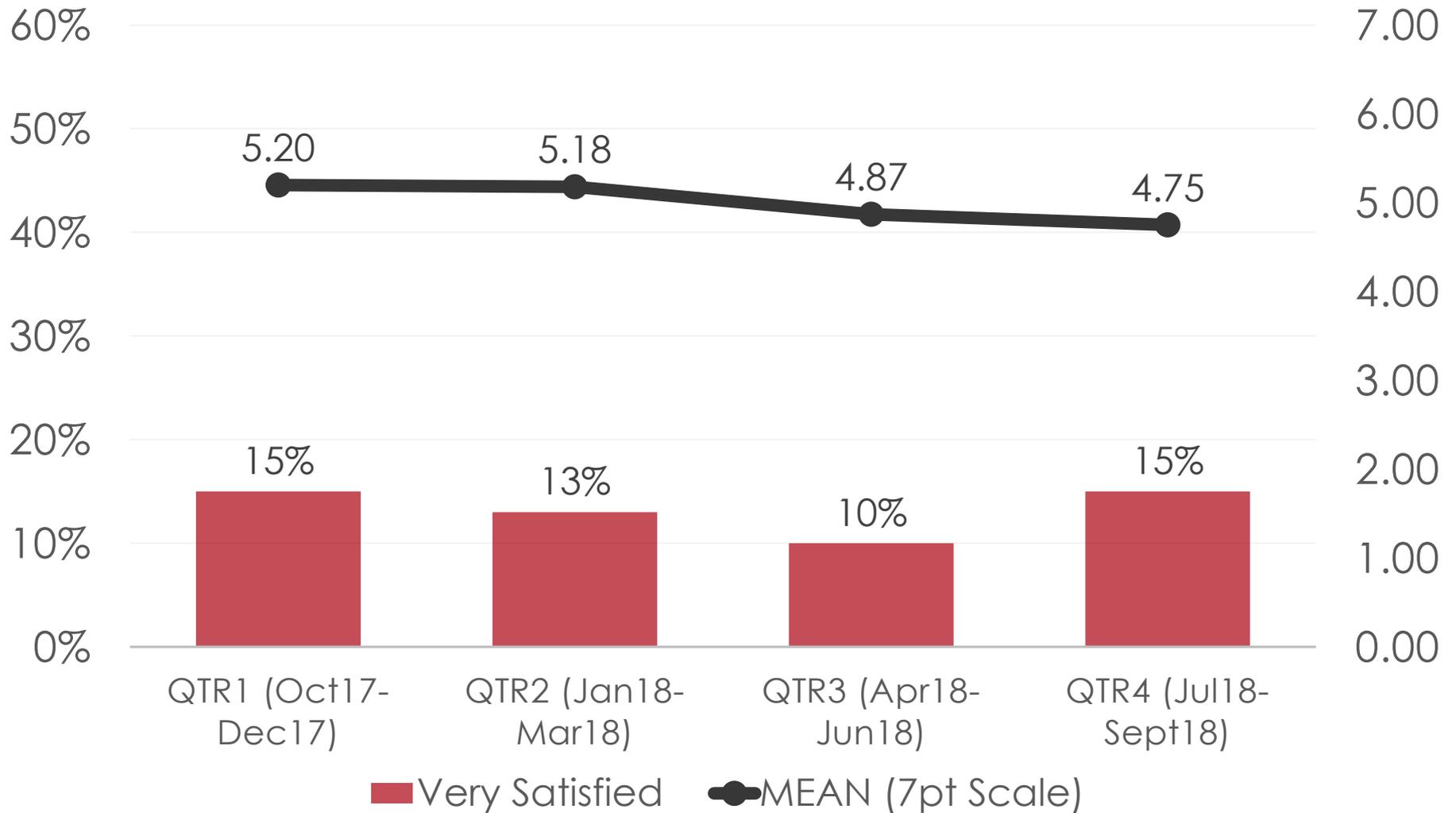
GENERAL SATISFACTION –
Quality/ Cleanliness

Chart showing "Very Satisfied (Top Box)" percentages and "MEAN (7pt Scale)" by category:

Category	Very Satisfied (Top Box)	MEAN (7pt Scale)
Beaches/ Parks	26%	5.36
Air/ Sky	41%	5.76
Parks	28%	5.41
Landscape Tumon	30%	5.49
Landscape Guam	28%	5.45
Ground Handler	20%	5.01
Transportation vehicle	23%	5.22

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

[A]
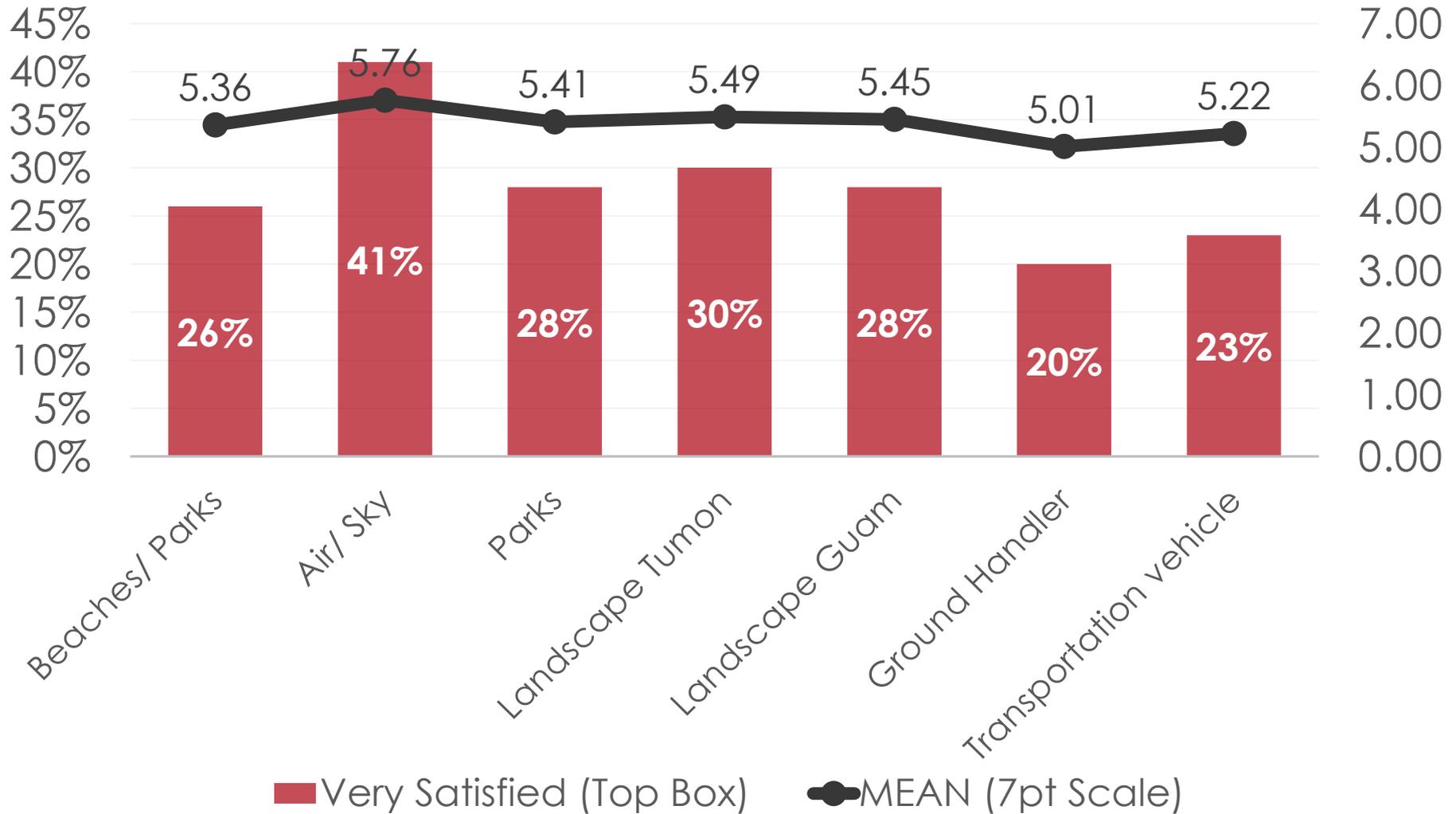
ACCOMMODATIONS –
OVERALL SATISFACTION
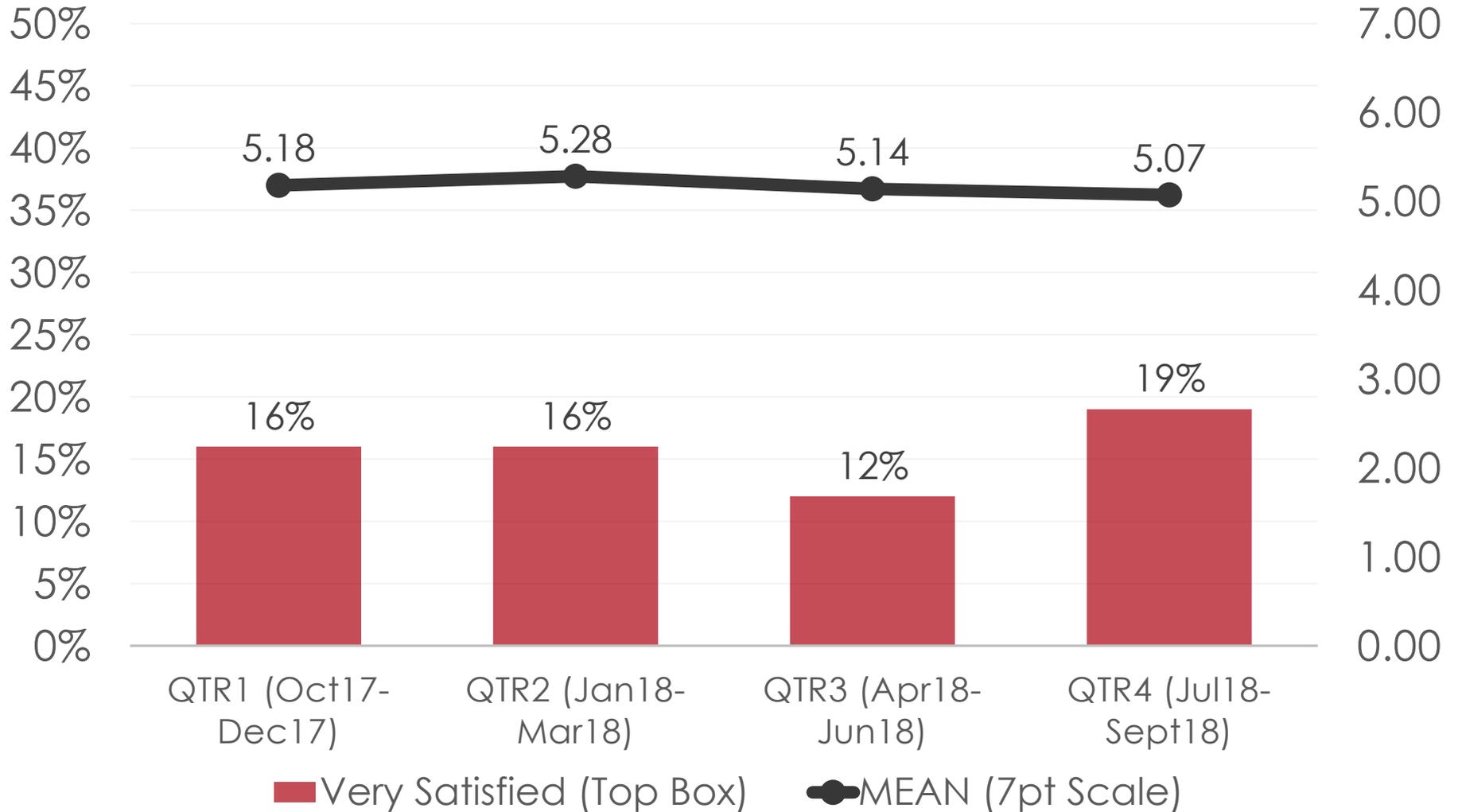
ACCOMMODATIONS –
Satisfaction by Category

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

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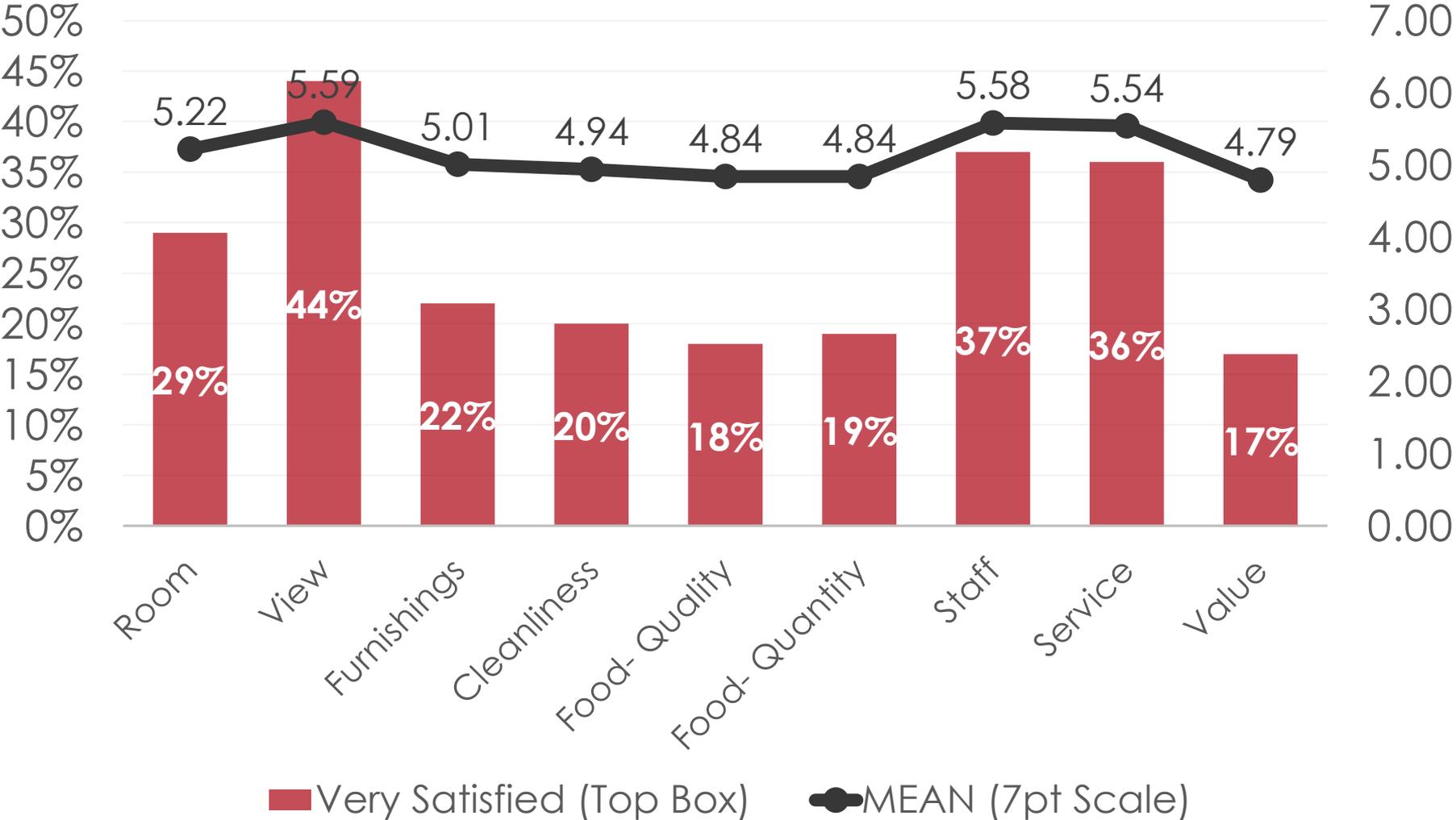
DINING EXPERIENCE (Outside Hotel) –
Satisfaction by Category

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

Categories and values:
- Furnishings: 17% — 4.90
- Cleanliness: 15% — 4.84
- Food- Quality: 17% — 4.91
- Food- Quantity: 16% — 4.82
- Staff: 30% — 5.38
- Service: 30% — 5.35
- Value: 13% — 4.42

[A]
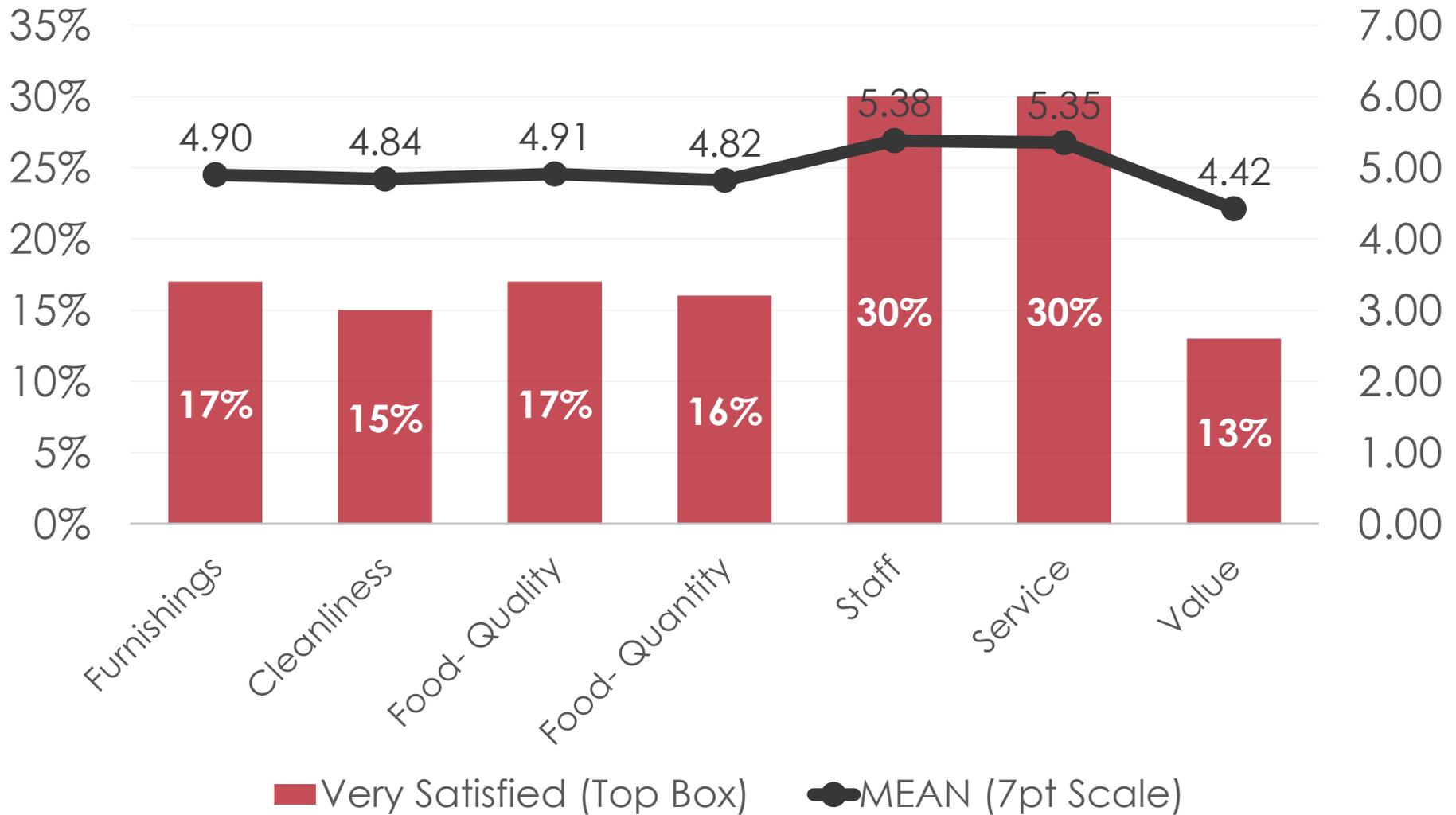
Shopping Malls/ Stores (Top Responses)

Bar chart showing top responses for shopping malls/stores:
- ABC Store: 73%
- DFS Galleria: 70%
- Guam Premium Outlet: 65%
- K-Mart: 63%
- Micro Mall: 50%
- Macys: 31%
- Ross: 31%
- JP Super: 23%
- Tumon Sands: 20%
- The Plaza: 19%

[A]

SHOPPING - SATISFACTION

5.36   5.22

24%   23%

QUALITY   VARIETY

■ Very Satisfied (Top Box)   ●━━● MEAN (7pt Scale)

[A]
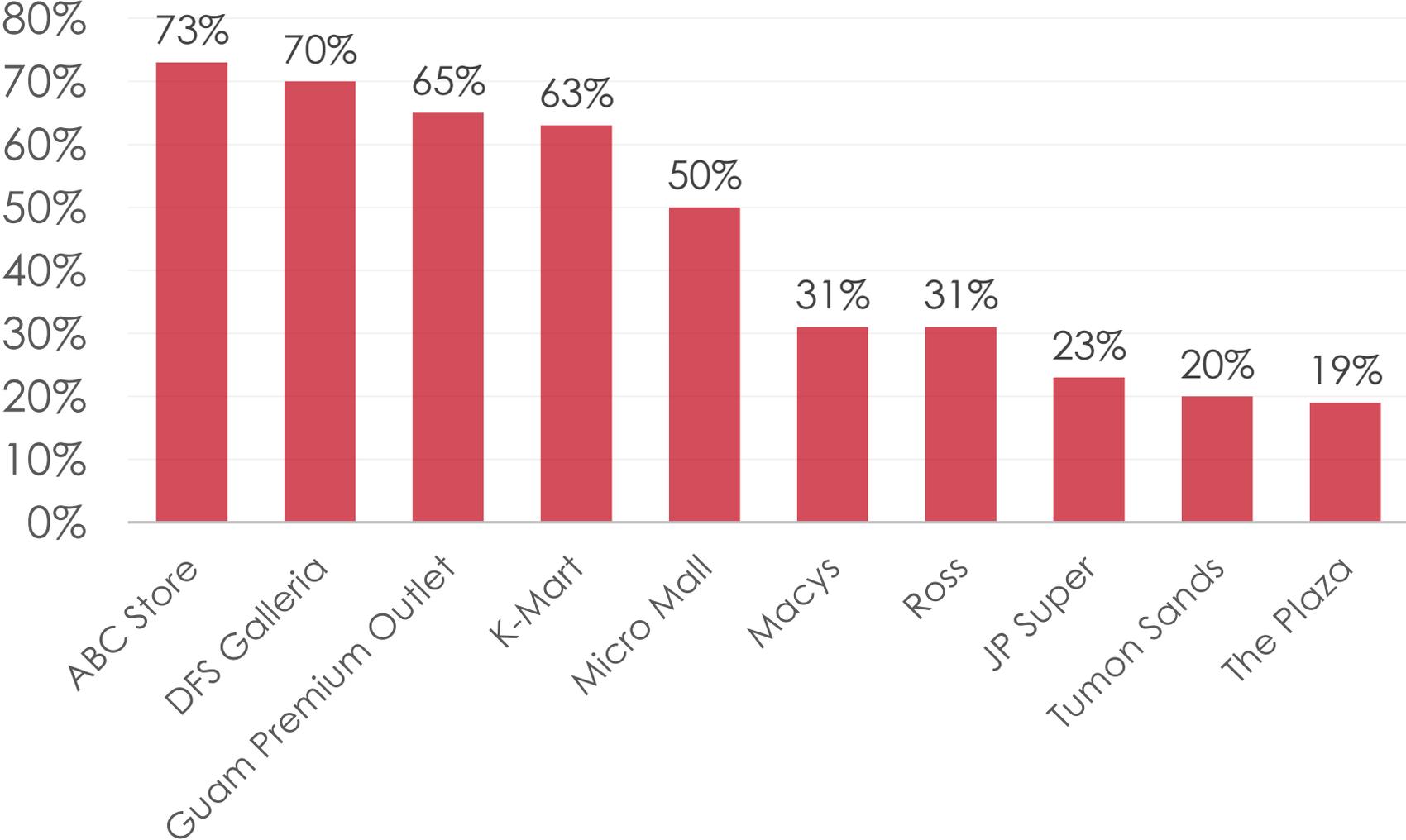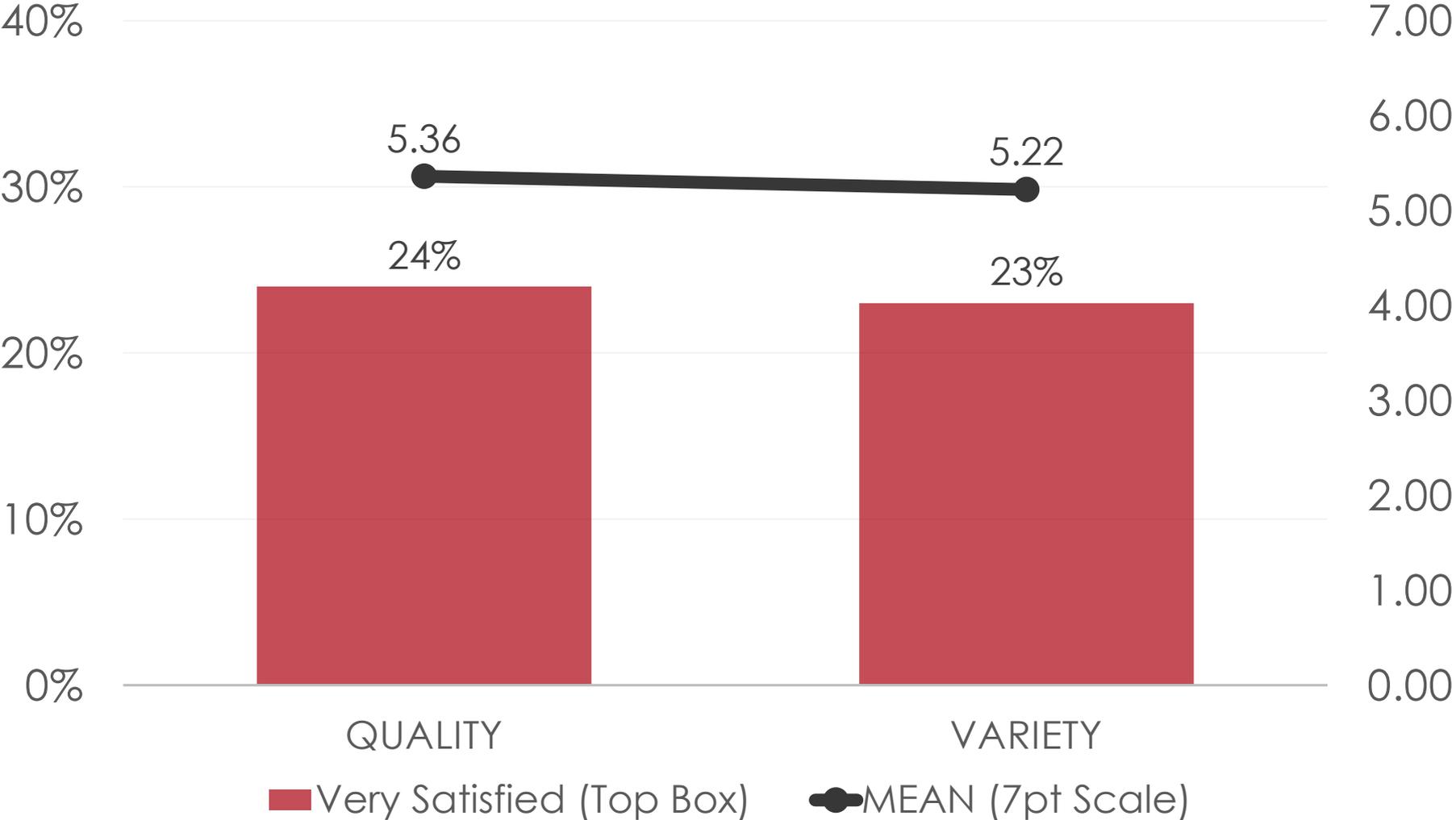
OPTIONAL TOUR PARTICIPATION – FY2018 Tracking

[A]
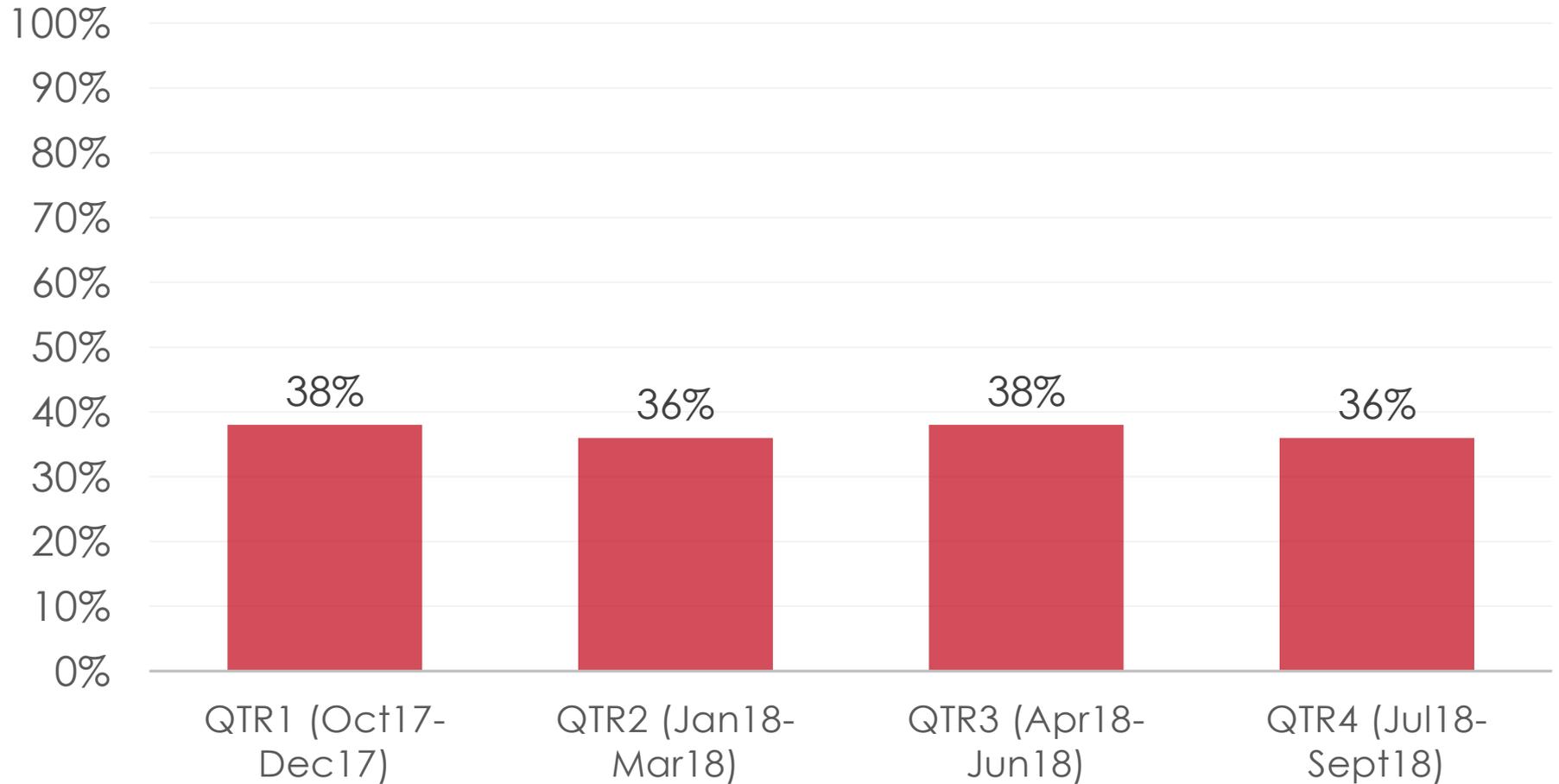
Optional Tour Participation
(Top Responses 5%+)

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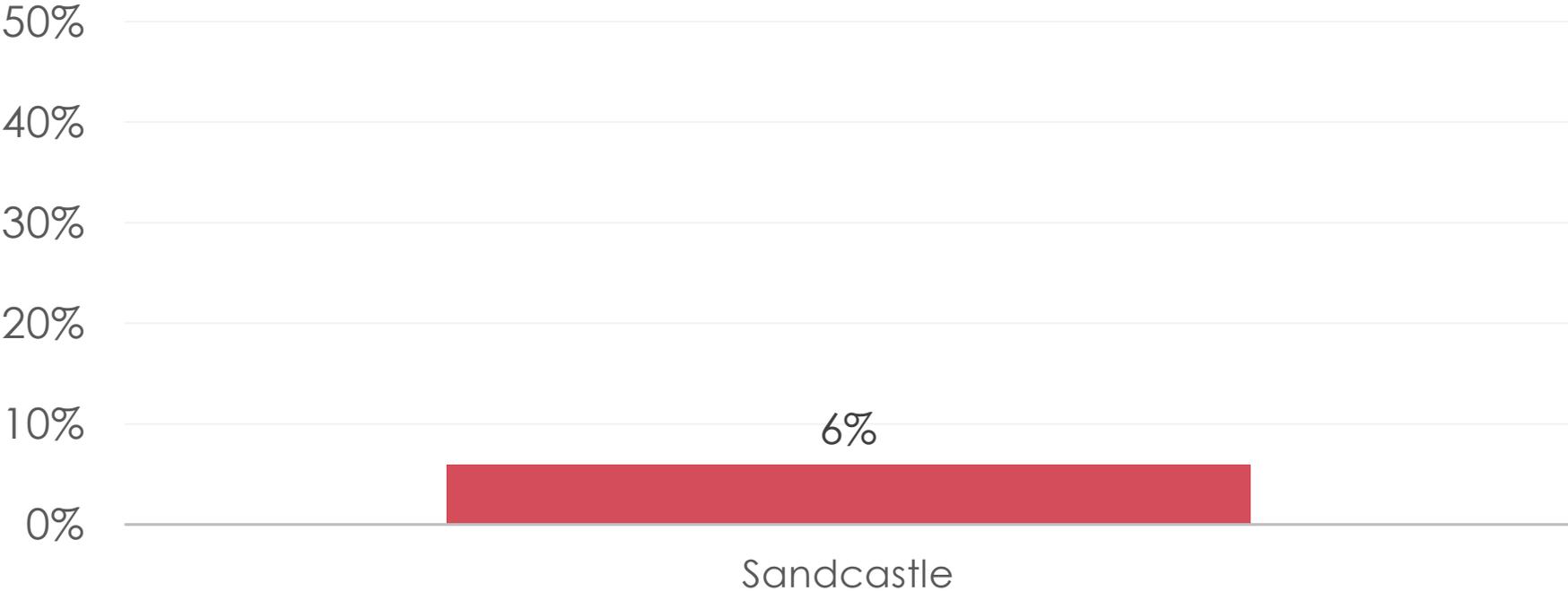
Optional Tour Satisfaction
Top Responses only - Participation (5%+)

6.21

65%
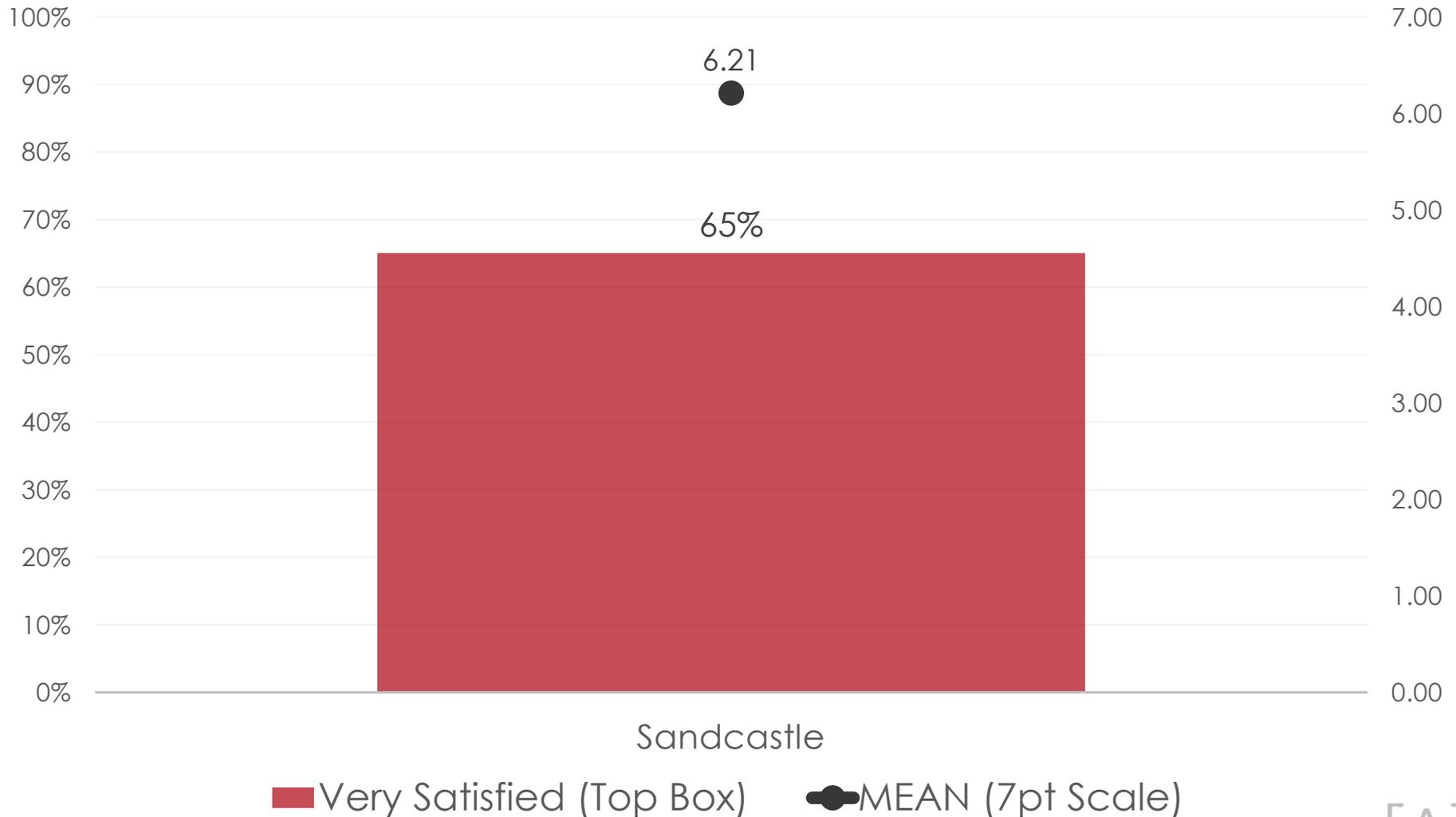
Sandcastle

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

[A]

DAY TOUR - SATISFACTION
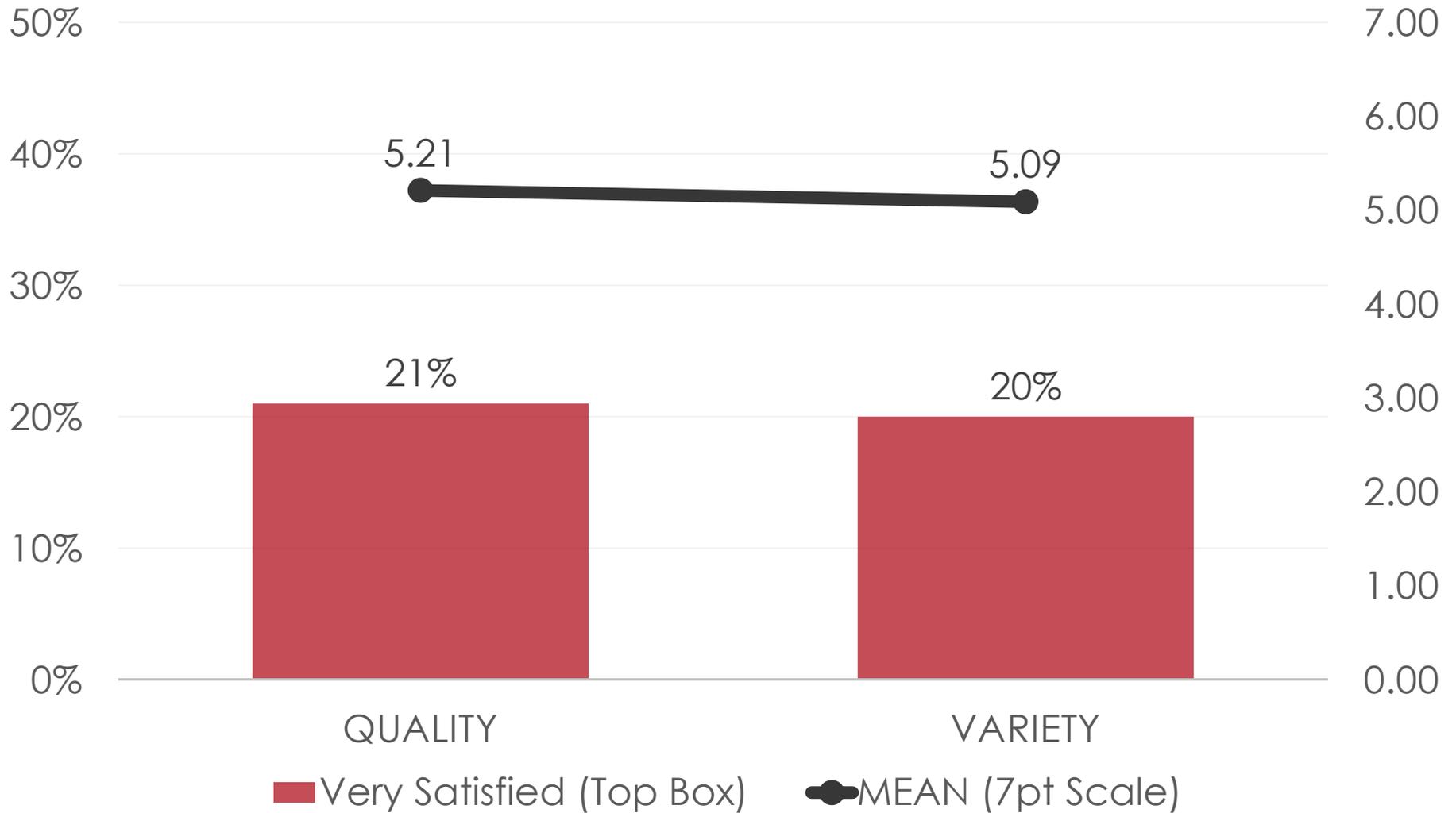
NIGHT TOUR - SATISFACTION

[A]
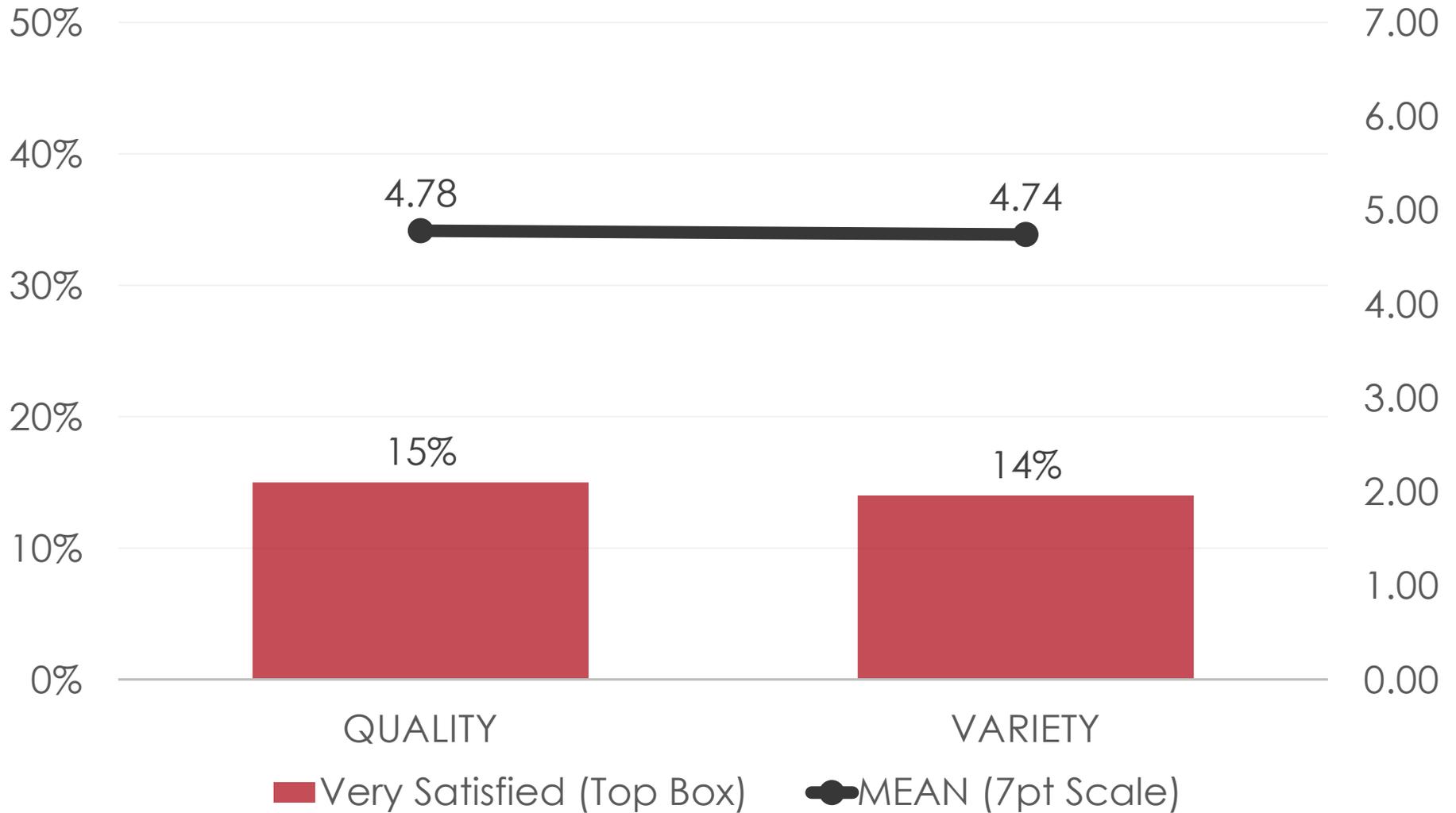
Activities Participation (Top Responses)

Bar chart showing activity participation percentages:
- Shopping: 83%
- Sightseeing: 62%
- Snorkle: 51%
- Two-Lovers Pt: 47%
- Beach Resort: 26%
- Dolphin Watch: 25%
- Water Park: 24%
- Dinner Show: 19%
- Jet ski: 10%
- Parasail: 8%
- Scuba: 7%
- Windsurf: 4%

[A]
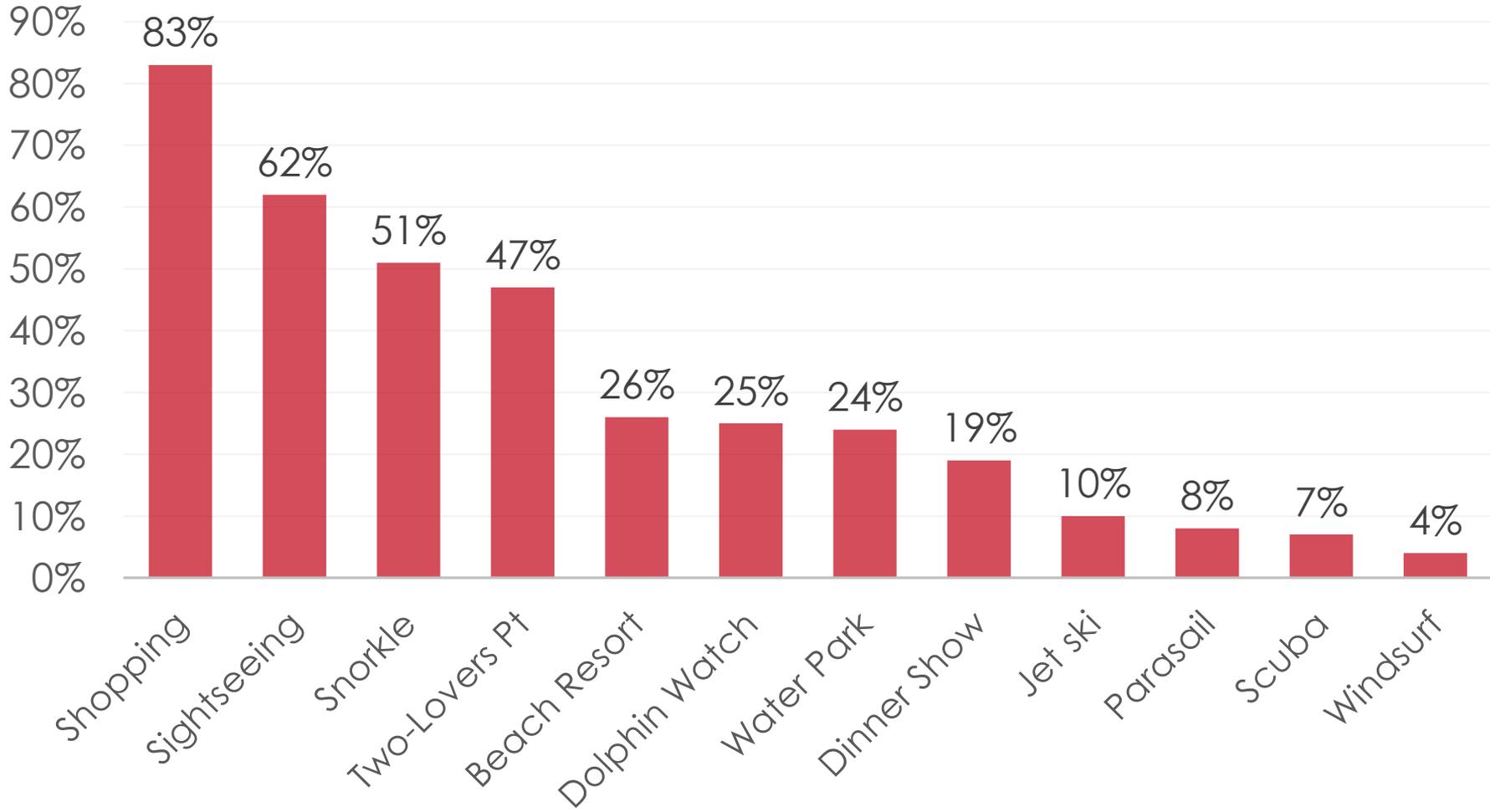
SECTION 5 PROMOTIONS

[A]

INTERNET- GUAM SOURCES OF INFORMATION
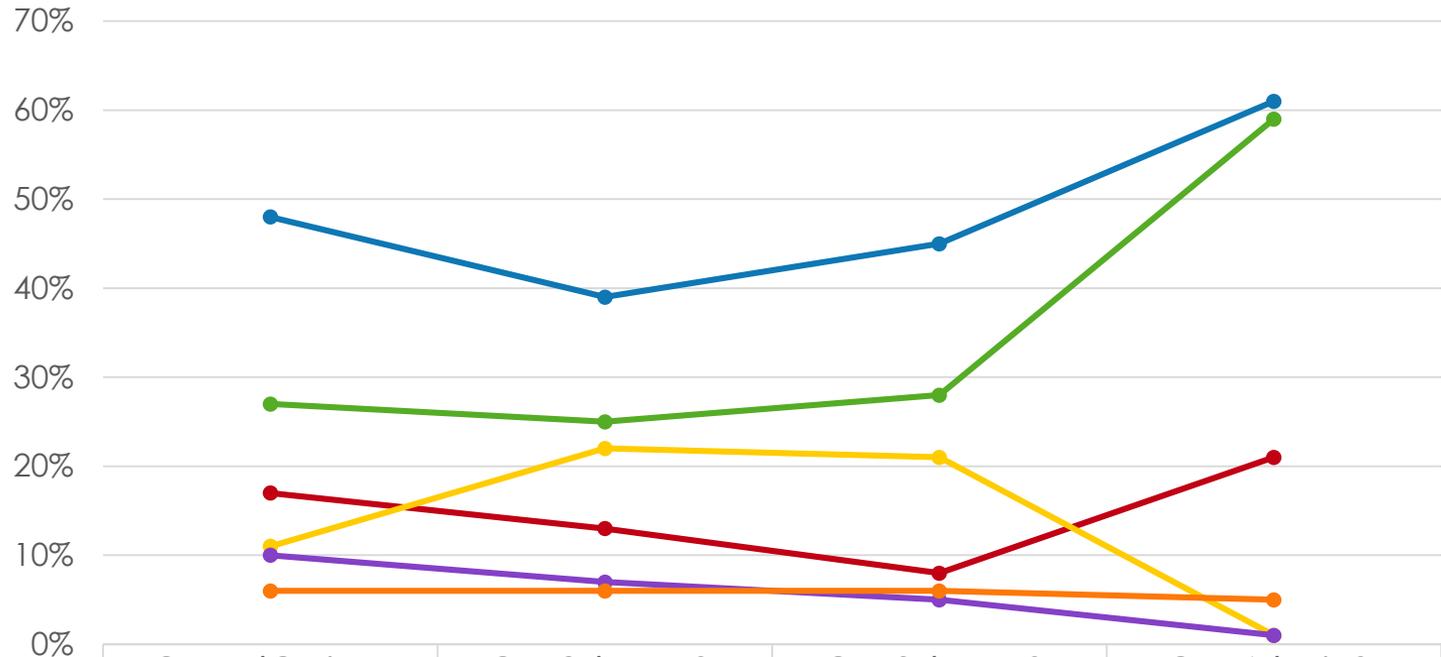
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
Search engines	48%	39%	45%	61%
Social network	17%	13%	8%	21%
Blog/ Vlog	27%	25%	28%	59%
Forums	11%	22%	21%	1%
Q&A site	10%	7%	5%	1%
Do NOT use	6%	6%	6%	5%

[A]

INTERNET- SOURCES OF INFORMATION
Things to do on Guam
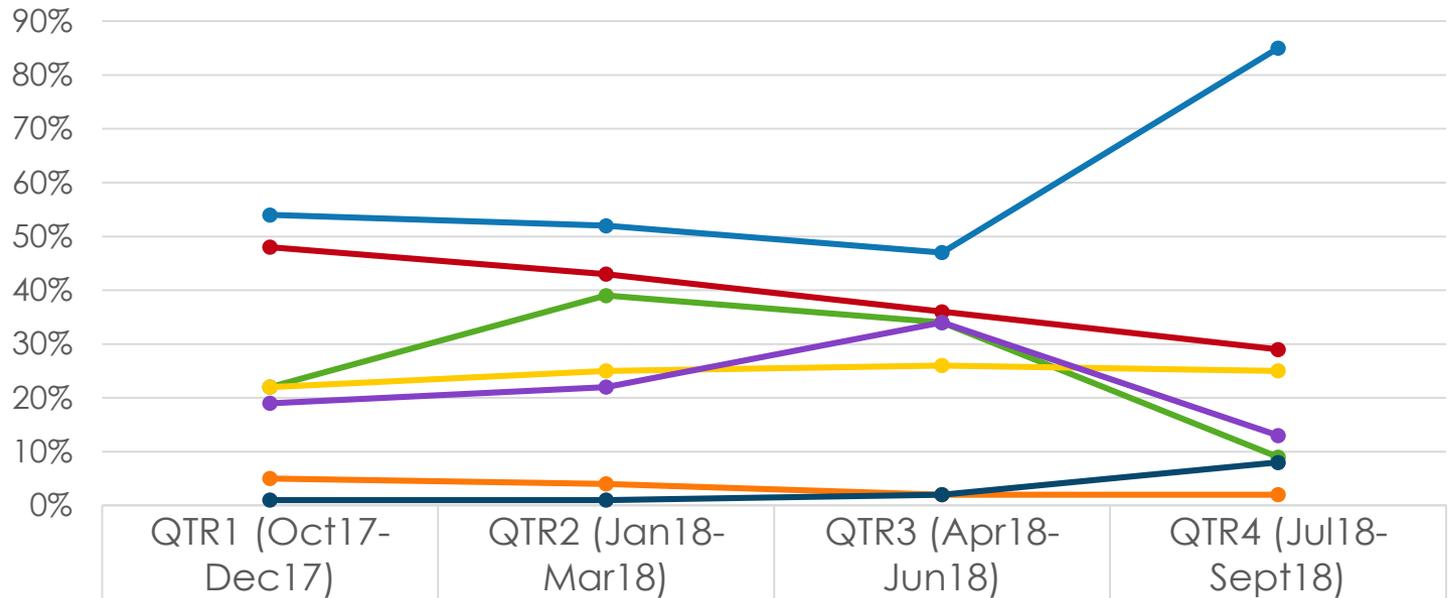
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
Naver	54%	52%	47%	85%
Google	48%	43%	36%	29%
Facebook	22%	39%	34%	9%
Instagram	22%	25%	26%	25%
DAUM	19%	22%	34%	13%
Twitter	5%	4%	2%	2%
Online Booking	1%	1%	2%	8%

101

[A]

INTERNET- SOURCES OF INFORMATION GVB
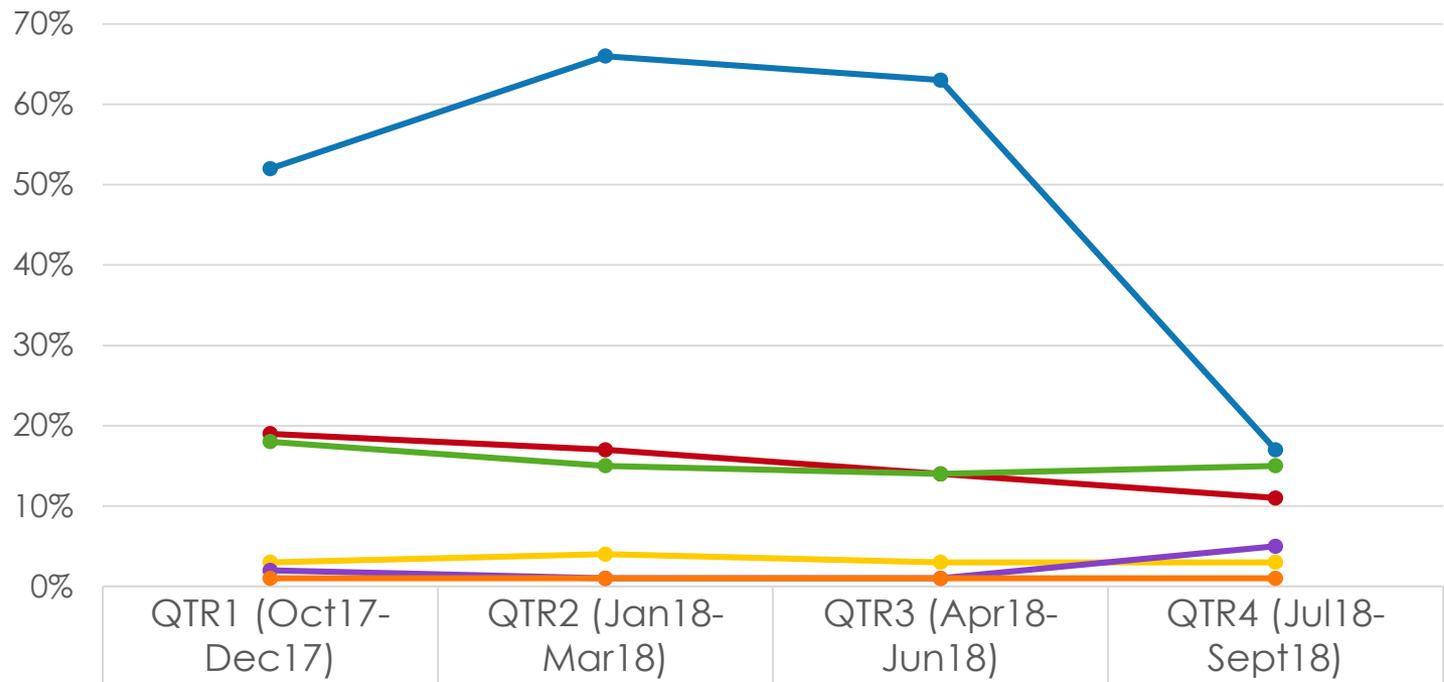
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
GVB Website	52%	66%	63%	17%
GVB Café	19%	17%	14%	11%
GVB Blog	18%	15%	14%	15%
GVB Facebook	3%	4%	3%	3%
GVB Instagram	2%	1%	1%	5%
GVB Twitter	1%	1%	1%	1%

[A]

TRAVEL MOTIVATION
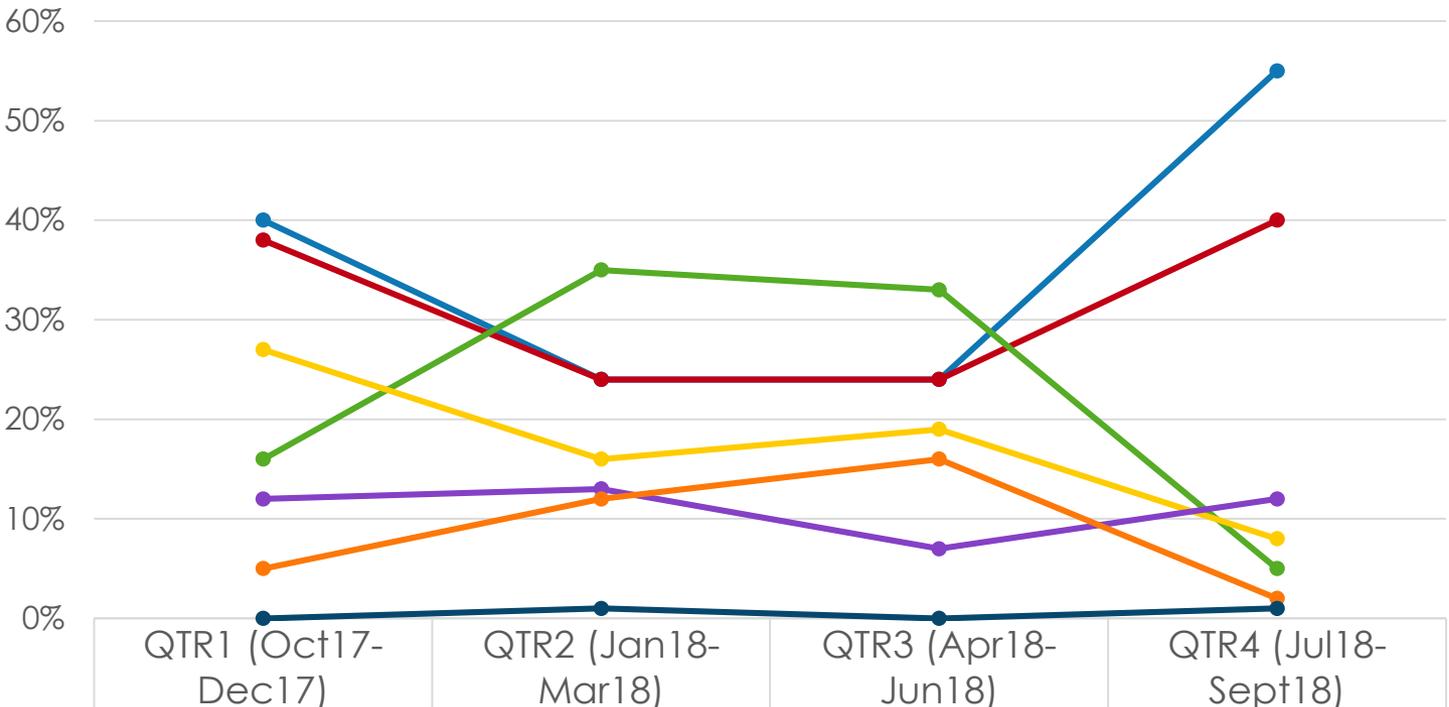
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
Friends/ Family	40%	24%	24%	55%
Internet	38%	24%	24%	40%
Print	16%	35%	33%	5%
Travel Agent	27%	16%	19%	8%
Social Media	12%	13%	7%	12%
Travel Show	5%	12%	16%	2%
Bus Trip	0%	1%	0%	1%

[A]

PRE-ARRIVAL SOURCES OF INFORMATION
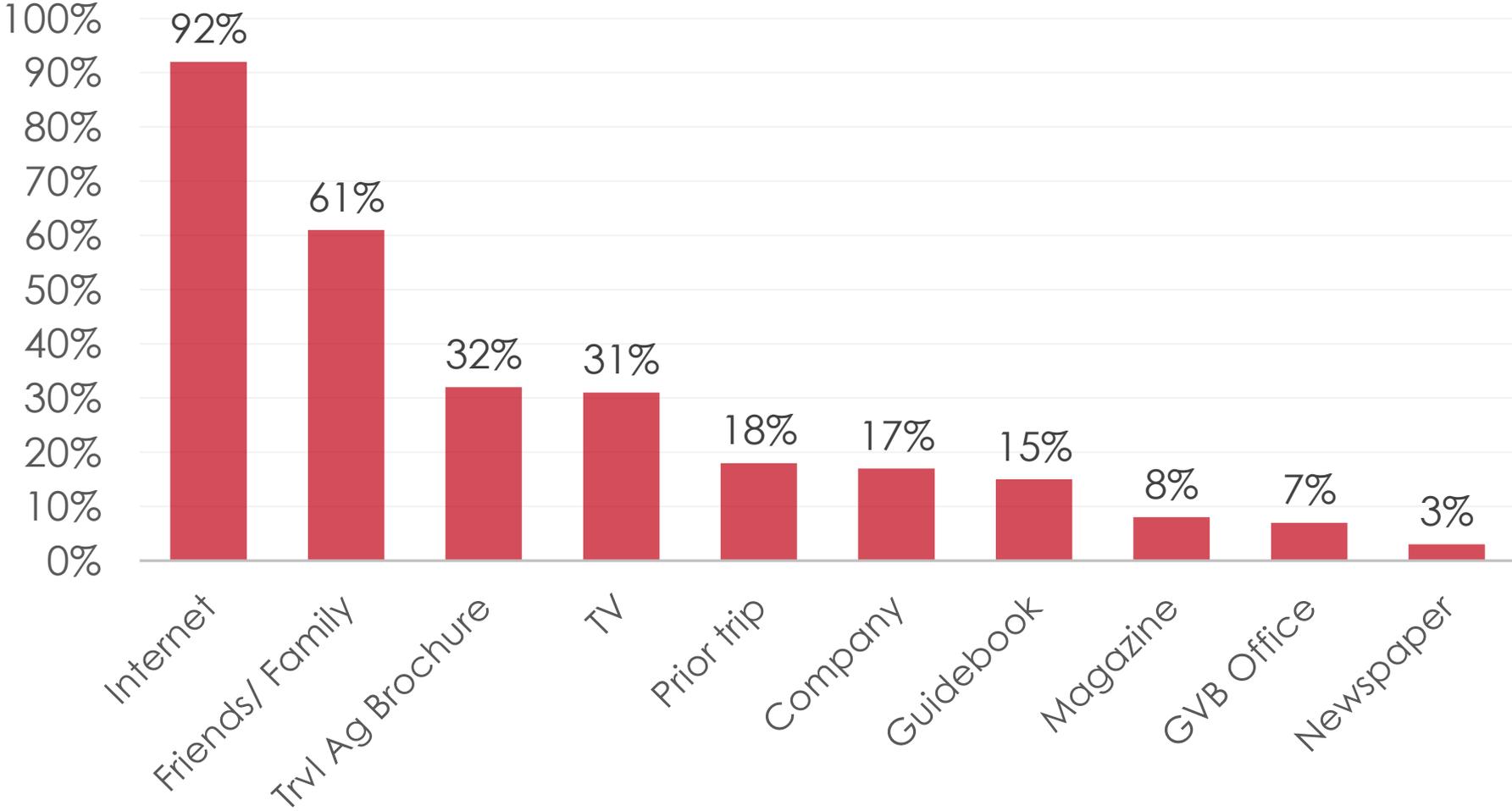
PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

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

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
Q1	Internet/Mobile App	92%	100%	92%	75%	92%	93%	86%	90%	96%
	Friend or relative	61%	100%	55%	100%	62%	54%	39%	58%	67%
	Travel agent brochure	32%		39%	50%	33%	46%	19%	33%	20%
	TV	31%		32%	25%	31%	29%	19%	32%	26%
	I have been to Guam before	18%		5%		18%	16%	81%	21%	22%
	Co-worker/ company travel department	17%	100%	24%		17%	16%	6%	16%	20%
	Travel guide book at bookstores	15%		24%		15%	9%	10%	14%	18%
	Magazine (consumer)	8%				7%	8%	7%	8%	5%
	Guam Visitors Bureau office	7%		5%	25%	6%	5%	11%	7%	6%
	Newspaper	3%				3%	3%	3%	4%	1%
	Travel trade shows	2%		3%		2%	3%	7%	3%	1%
	Consumer travel shows	1%		3%		1%	2%	0%	1%	1%
	Guam Visitors Bureau promotional activities	0%			25%	0%	2%		0%	0%
	Radio	0%				0%		0%	0%	0%
	Total	1051	1	38	4	932	119	237	814	631

Prepared by Anthology Research

ONISLE
SOURCES OF INFORMATION

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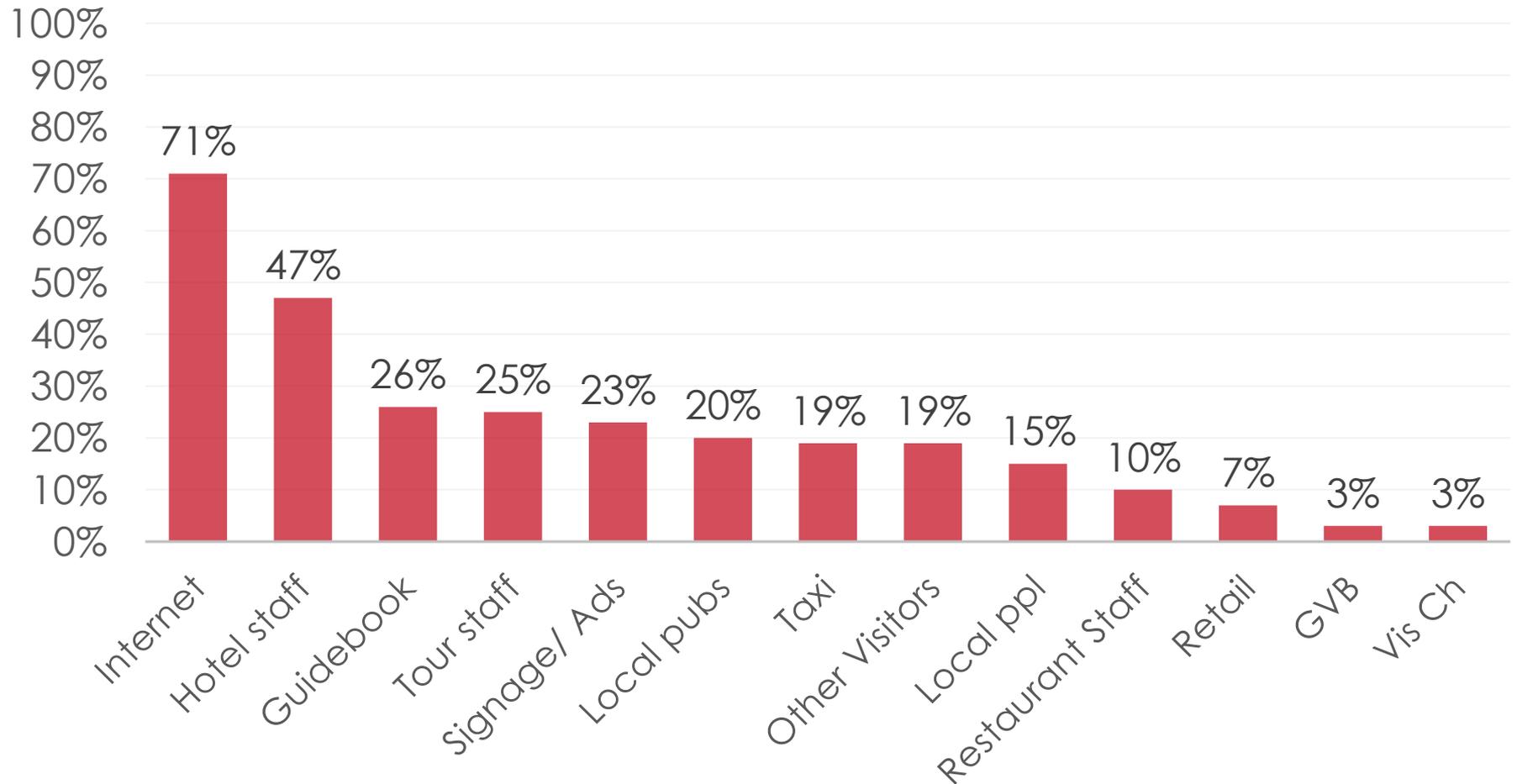
# ON-ISLE
SOURCES OF INFORMATION –
Key Segments

GVB EXIT SURVEY

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

|		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
Q2	Internet/Mobile App	71%	100%	65%	75%	72%	66%	71%	70%	78%
	Hotel staff	47%	100%	49%	50%	47%	50%	45%	47%	48%
	Guide books I brought with me	26%		32%		26%	25%	28%	26%	30%
	Tour staff	25%		30%	50%	25%	26%	19%	28%	7%
	Signs/ advertisement	23%		22%		23%	20%	21%	23%	23%
	Local publication	20%		8%	25%	20%	17%	26%	21%	19%
	Taxi drivers	19%		27%		19%	22%	15%	17%	23%
	Other visitors	19%		14%	25%	19%	24%	17%	19%	22%
	Local people	15%		22%	25%	15%	15%	21%	14%	15%
	Restaurant staff (outside hotel)	10%		3%	25%	10%	9%	13%	10%	10%
	Retail staff	7%		11%	25%	7%	11%	5%	7%	7%
	Visitors channel	3%				3%	1%	4%	4%	3%
	Guam Visitors Bureau	3%	100%	8%		3%	2%	4%	3%	3%
	Total	1045	1	37	4	928	117	235	809	628

Prepared by Anthology Research

SECTION 6
FUTURE TRAVEL TO GUAM

[A]

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


Yes
35%

No
65%

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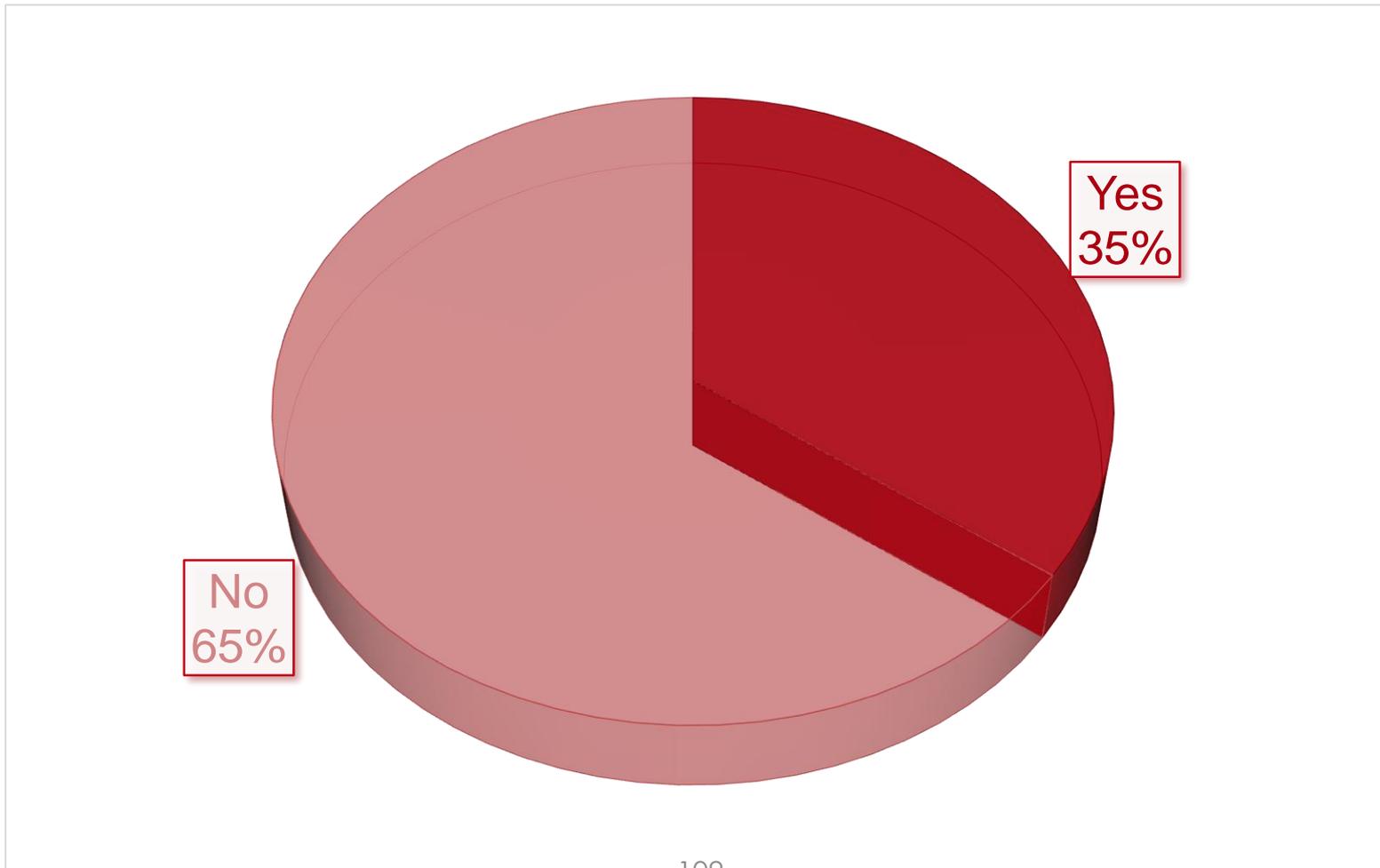
What would it take to make you stay an extra day on Guam?

[A]
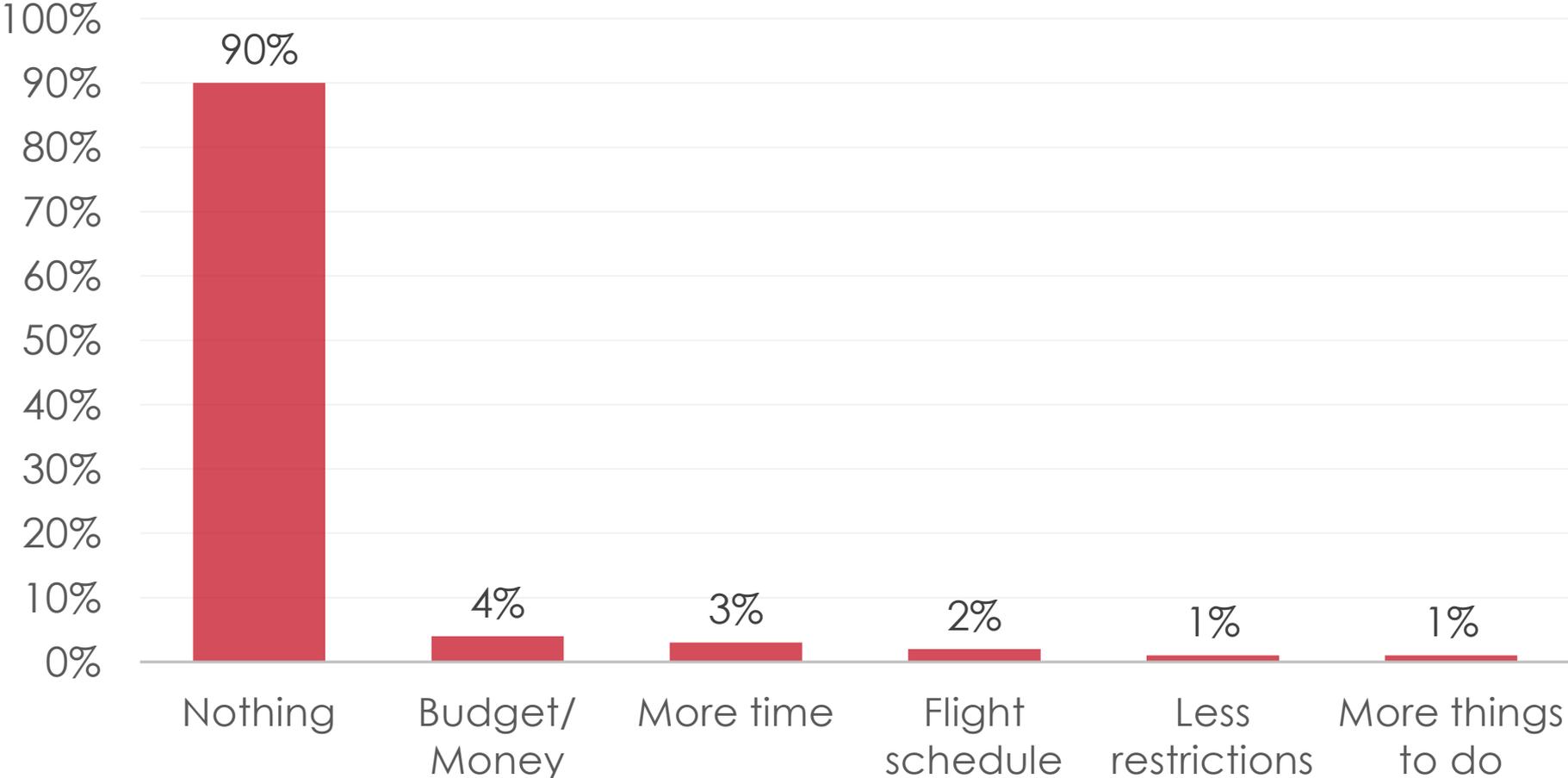
FUTURE TRAVEL CONCERNS

[A]
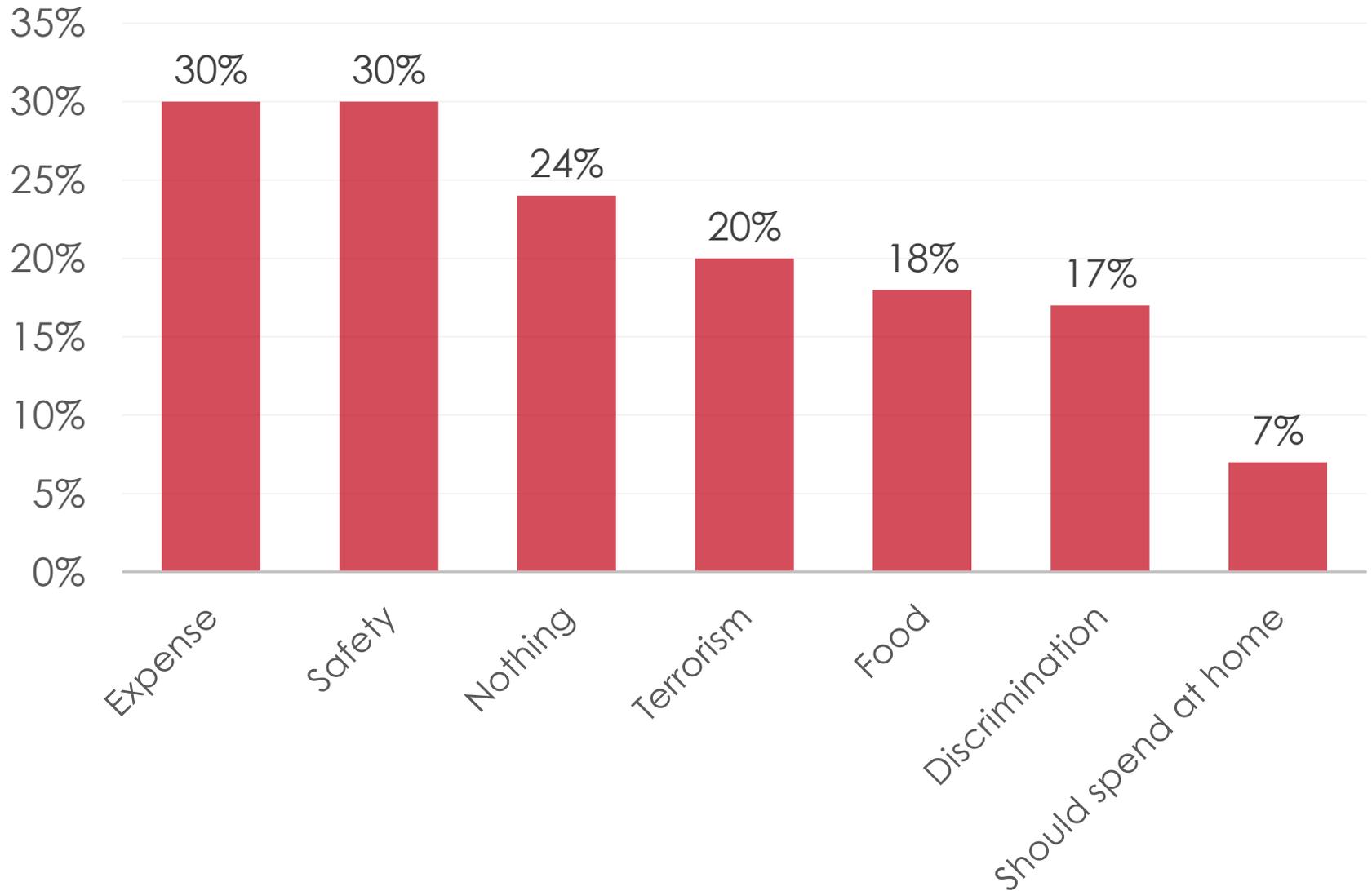
SECTION 7
GUAM CULTURE

[A]

# EXPERIENCED- CHAMORRO/ HAFA ADAI SPIRIT

[A]
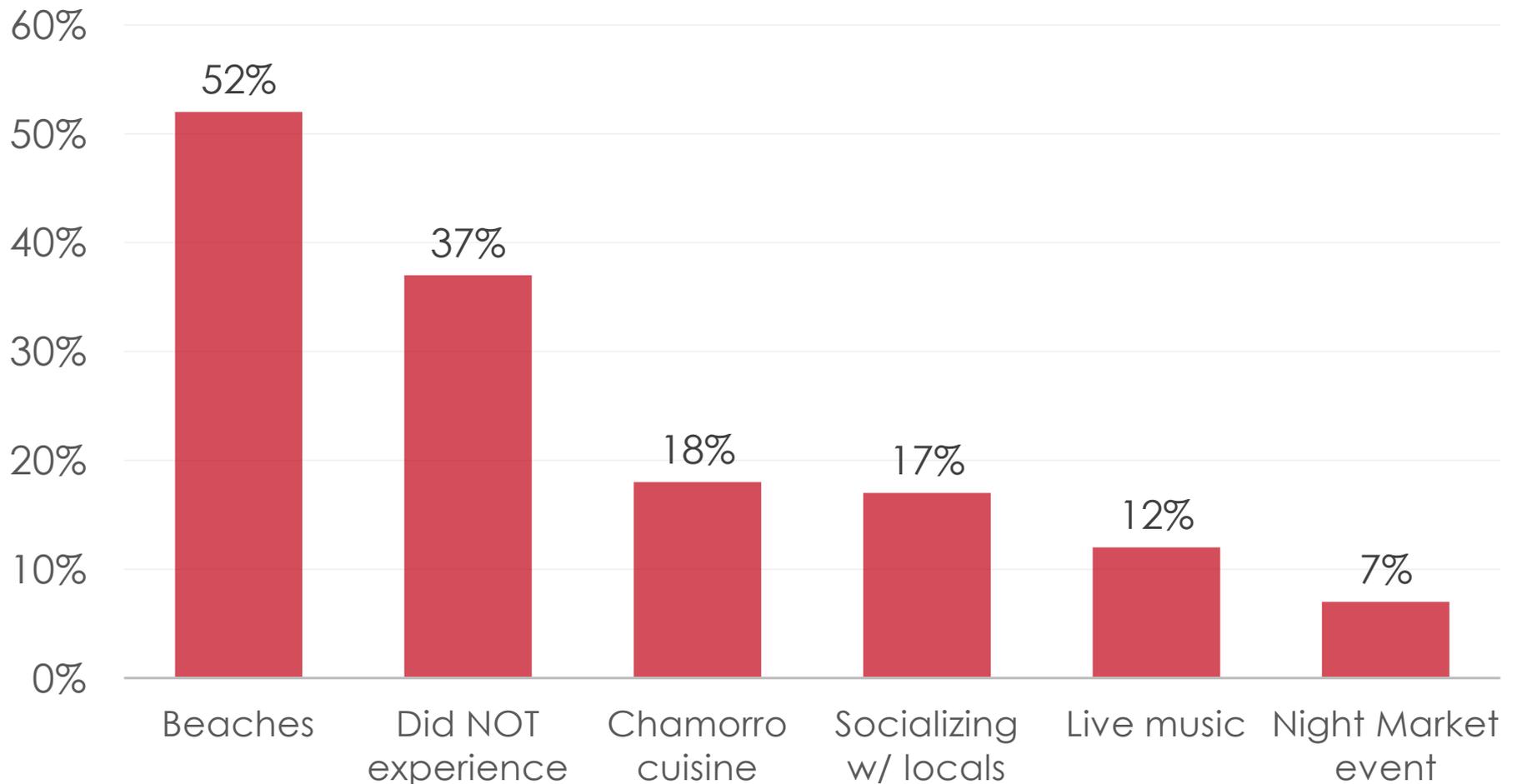
EXPERIENCED-
# OTHER CULTURAL ACTIVITY/EVENTS

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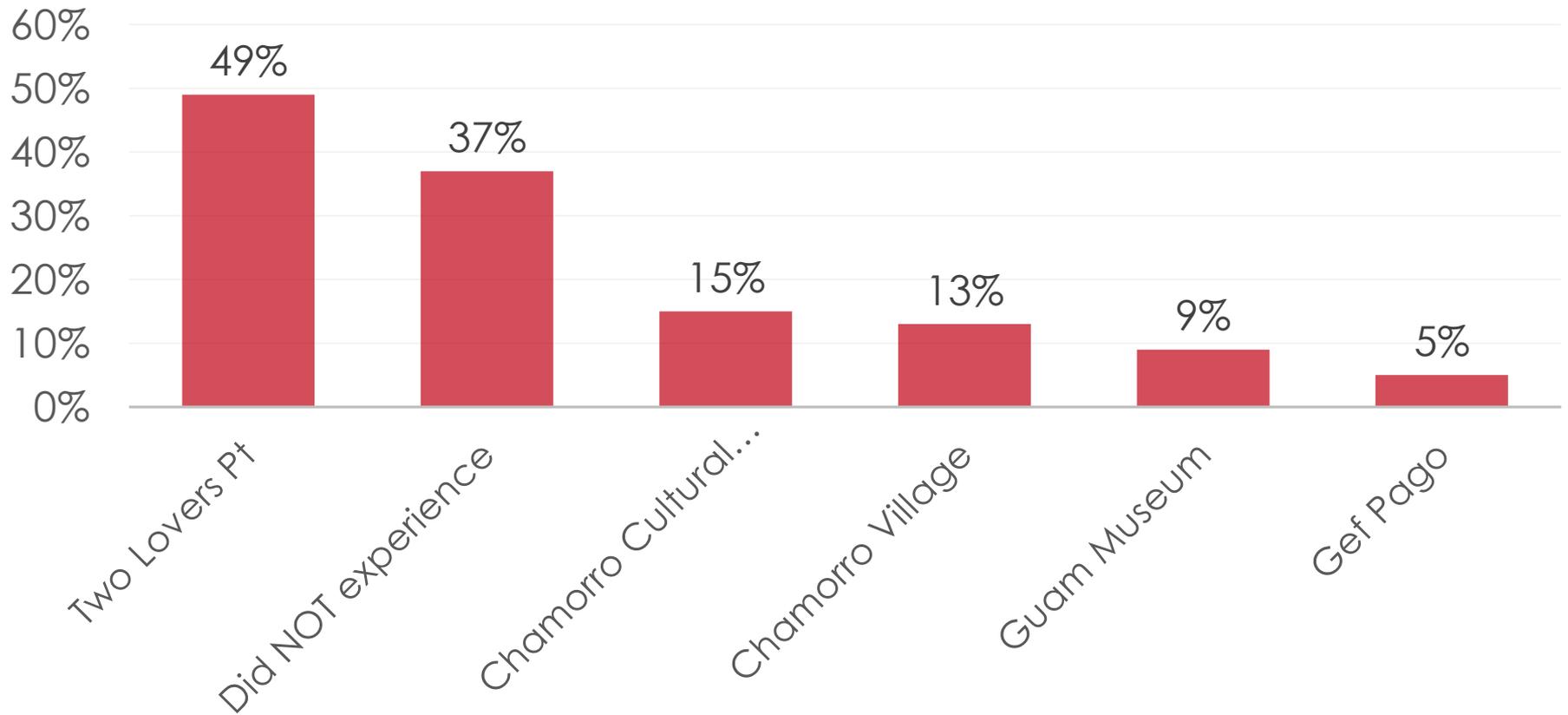
SOURCES OF INFORMATION-CULTURAL ACTIVITY/EVENTS
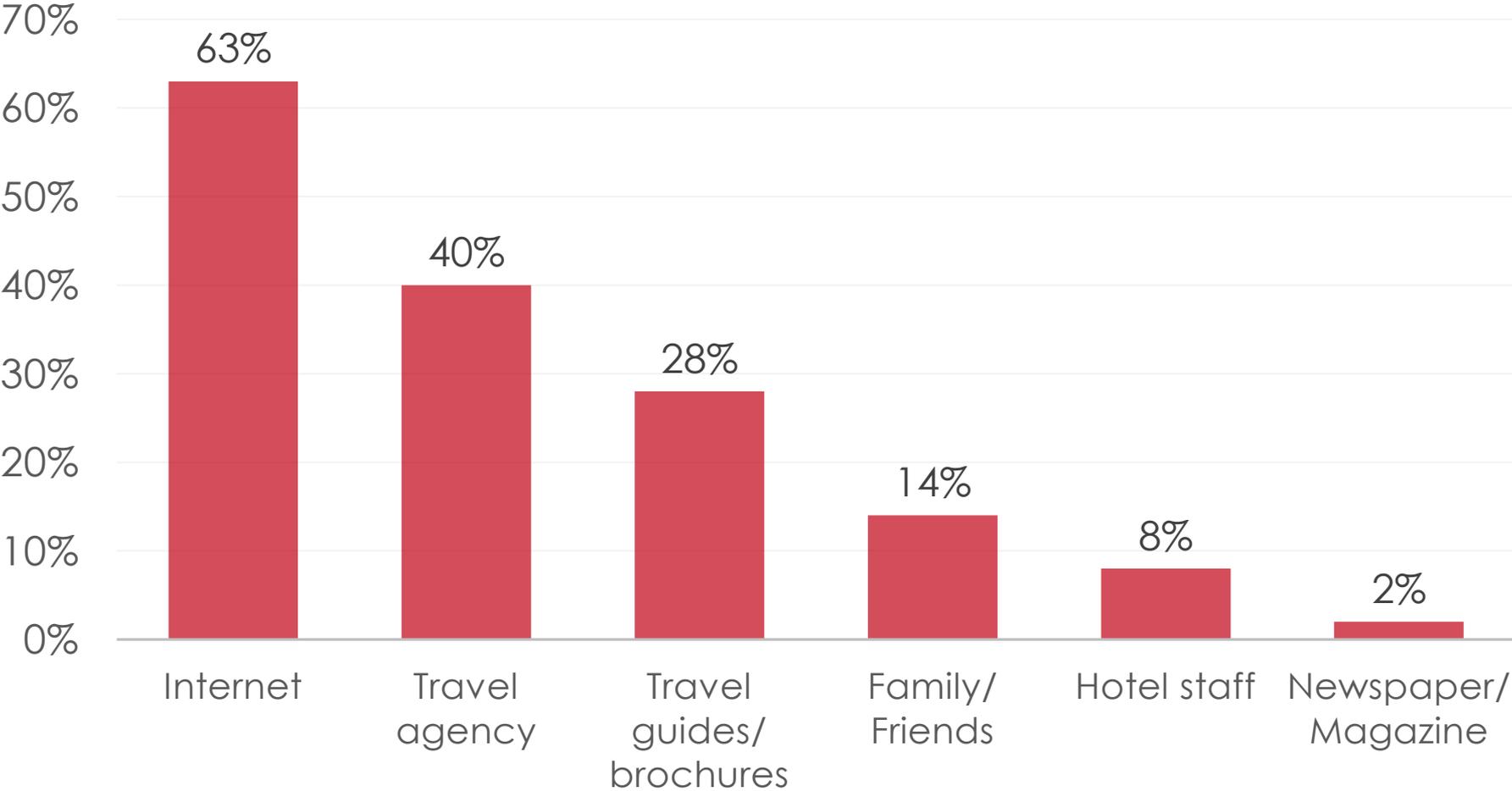
SATISFACTION-CULTURAL ACTIVITY/EVENTS
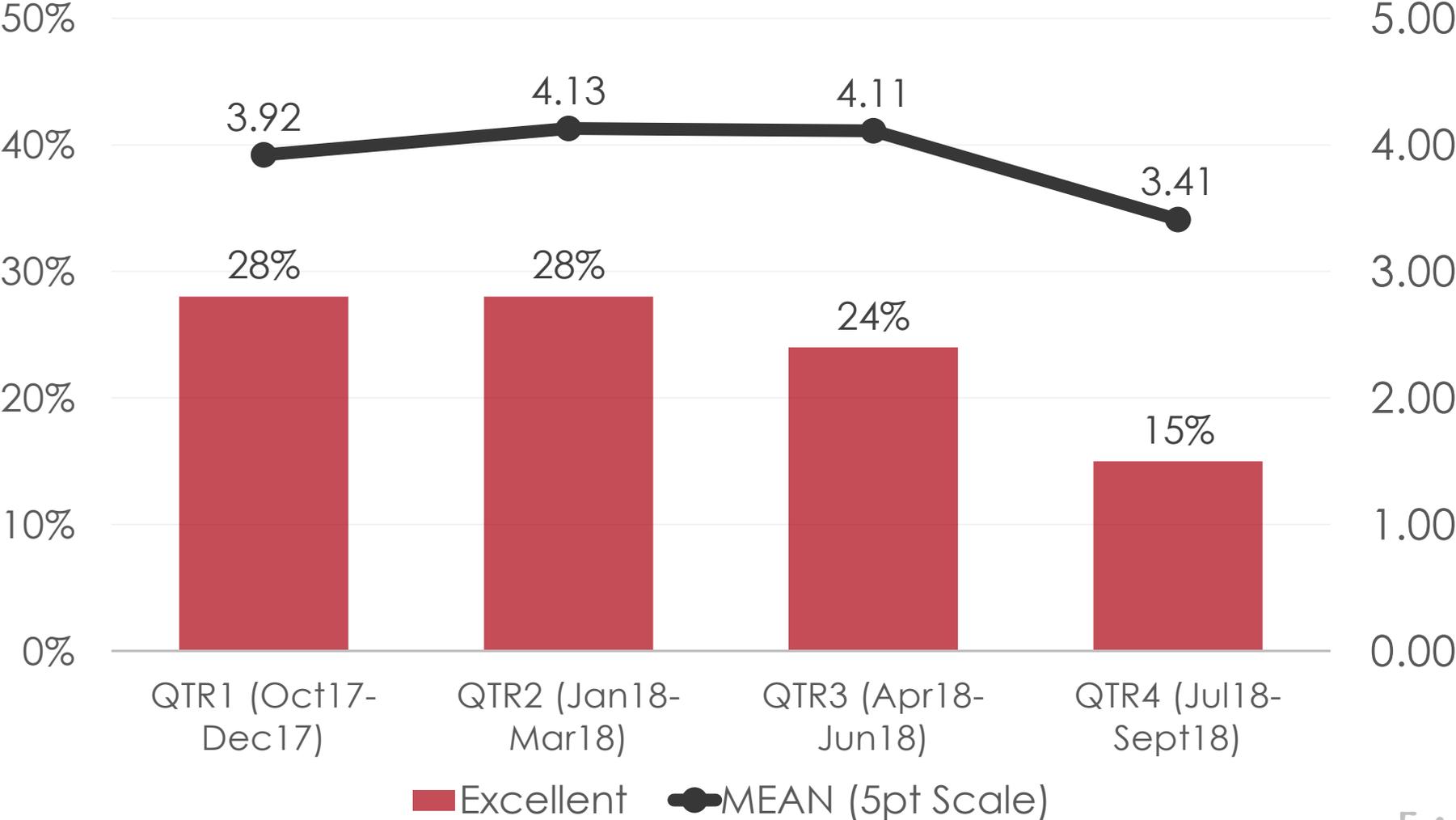
OBSTACLES-
CULTURAL ACTIVITY/EVENTS

[A]
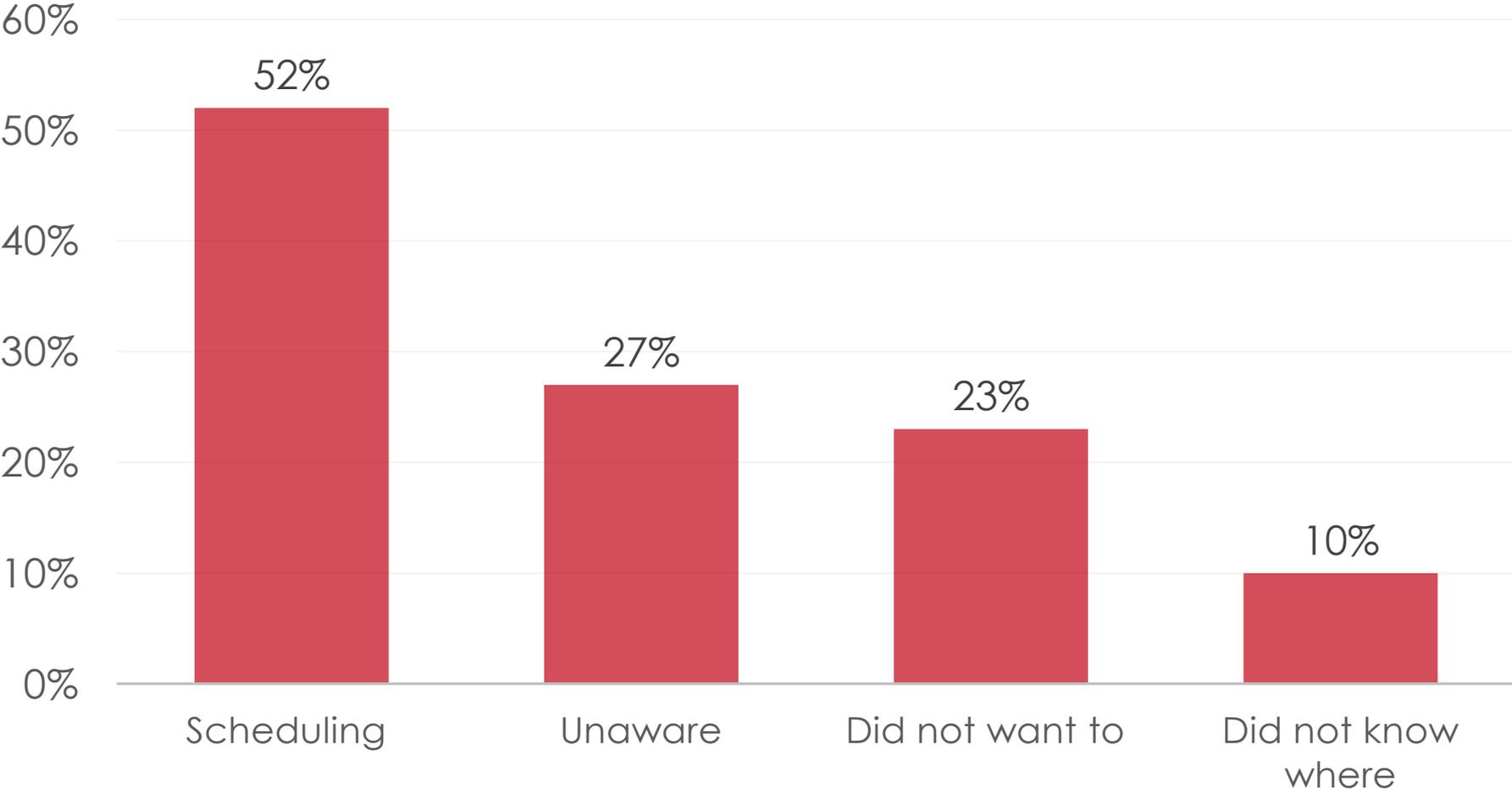
ADVANCED STATISTICS

[A]

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.

[A]

Drivers- Overall Satisfaction

Comparison of Drivers of Overall Satisfaction, 1st, 2nd, 3rd and 4th Qtr 2018, and Overall 2018					
Drivers:	1st Qtr 2018 rank	2nd Qtr 2018 rank	3rd Qtr 2018 rank	**4th Qtr 2018 rank**	Combined O1-4 Qtr 2018 rank
Quality & Cleanliness of beaches & parks	4	1	1	**5**	1
Ease of getting around					
Safety walking around at night		7			8
Quality of daytime tours	1	4	2		4
Variety of daytime tours	7		6		11
Quality of nighttime tours					9
Variety of nighttime tours			10		6
Quality of shopping					
Variety of shopping	8	3	9	**4**	7
Price of things on Guam					
Quality of hotel accommodations	5			**6**	10
Quality/cleanliness of air, sky	3	5	4	**3**	3
Quality/cleanliness of parks					
Quality of landscape in Tumon			7		
Quality of landscape in Guam	2	8	3	**1**	2
Quality of ground handler	6	6	8	**2**	5
Quality/cleanliness of transportation vehicles		2	5		
% of Per Person On Island Expenditures Accounted For	29.7%	23.6%	42.1%	**50.5%**	35.9%
NOTE: Only significant drivers are included.					

[A]

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by six significant factors in the 4th Quarter FY2018 Period. By rank order they are:
  - **Quality of landscape in Guam,**
  - **Quality of ground handler,**
  - **Quality/cleanliness of air, sky,**
  - **Variety of shopping,**
  - **Quality & cleanliness of beaches & parks, and**
  - **Quality of hotel accommodations.**
- With all six factors the overall r^2 is .505 meaning that **50.5% of overall satisfaction is accounted for by these factors.**

[A]

Drivers – On-Isle Expenditures

Comparison of Drivers of Per Person On-Island Expenditures, 1st, 2nd, 3rd and 4th Qtr 2018 and Overall 2018					
	1st Qtr 2018	2nd Qtr 2018	3rd Qtr 2018	**4th Qtr 2018**	Combined 1-4 Qtr 2018
Drivers:	rank	rank	rank	**rank**	rank
Quality & Cleanliness of beaches & parks	1	3	1	**1**	1
Ease of getting around	3	4	6		
Safety walking around at night	4				7
Quality of daytime tours			3		3
Variety of daytime tours		6			
Quality of nighttime tours		7			4
Variety of nighttime tours		2	2		2
Quality of shopping					
Variety of shopping					
Price of things on Guam			8		
Quality of hotel accommodations	7		4		5
Quality/cleanliness of air, sky	6	5	5		6
Quality/cleanliness of parks					
Quality of landscape in Tumon					9
Quality of landscape in Guam		8	7		
Quality of ground handler	2	1			
Quality/cleanliness of transportation vehicles	5				8
% of Per Person On Island Expenditures Accounted For	25.4%	16.4%	18.1%	**0.5%**	10.5%
NOTE: Only significant drivers are included.					

[A]

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Korean visitors on Guam is driven by one significant factor in the 4th Quarter FY2018 period. It is:
  - **Quality & cleanliness of beaches & parks.**
- With this factor the overall r^2 is .005 meaning that **0.5% of per person on island expenditure is accounted for by this factor.**

[A]