

# Guam Visitors Bureau

## Japan Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

FEBRUARY 2017

Prepared by: Anthology Research

Information contained herein is the property of the Guam Visitors Bureau. The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.



# Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Japan 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 **352** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Japan 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 +/- 5.23 percentage points.

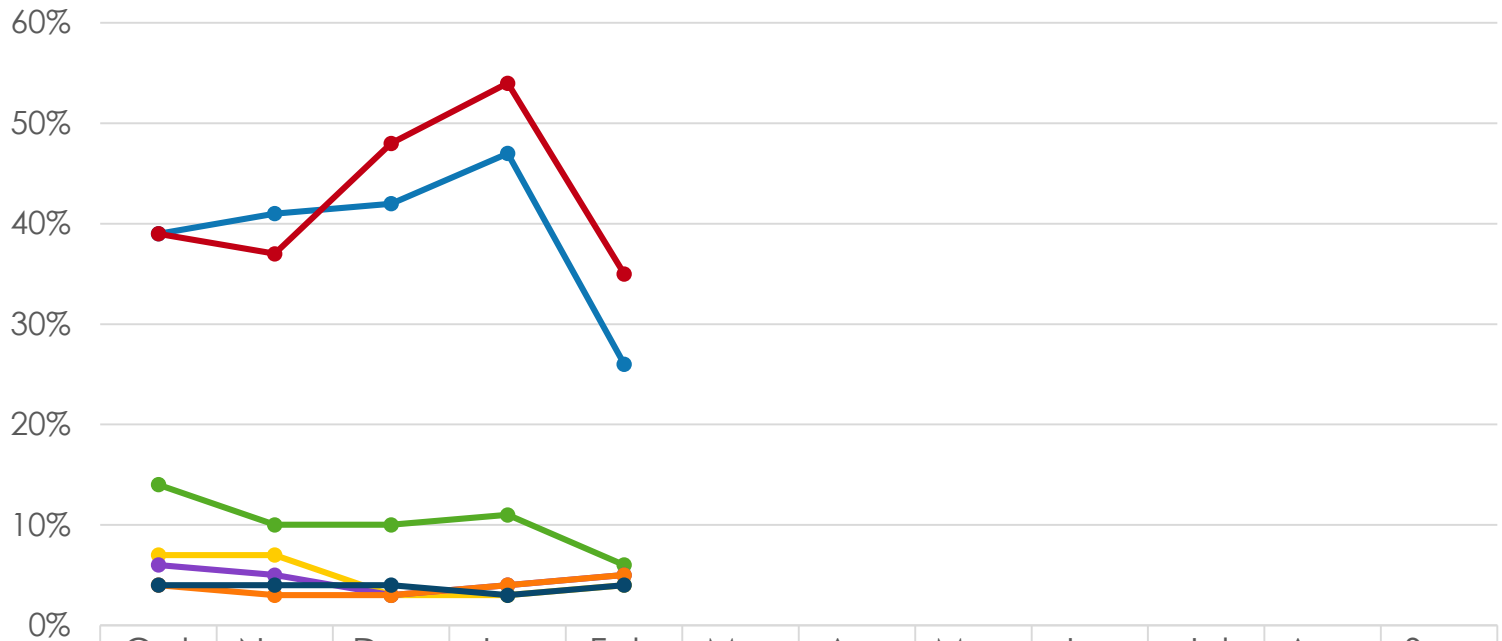
# Objectives

- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japan visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan 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 (Q6)
    - Office Lady/ Salary Woman (Gender/ Q25 Office worker- non-managerial)
    - Group Tour (Q7)
    - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)
    - Silver (QF Age 60+)
    - Wedding (Q5A)
    - Repeat Visitor (Q3A)
  - To identify the most significant factors affecting overall visitor satisfaction.
  - To identify (for all Japan visitors) the most important determinants of on-island spending

# Key Highlighted Segments

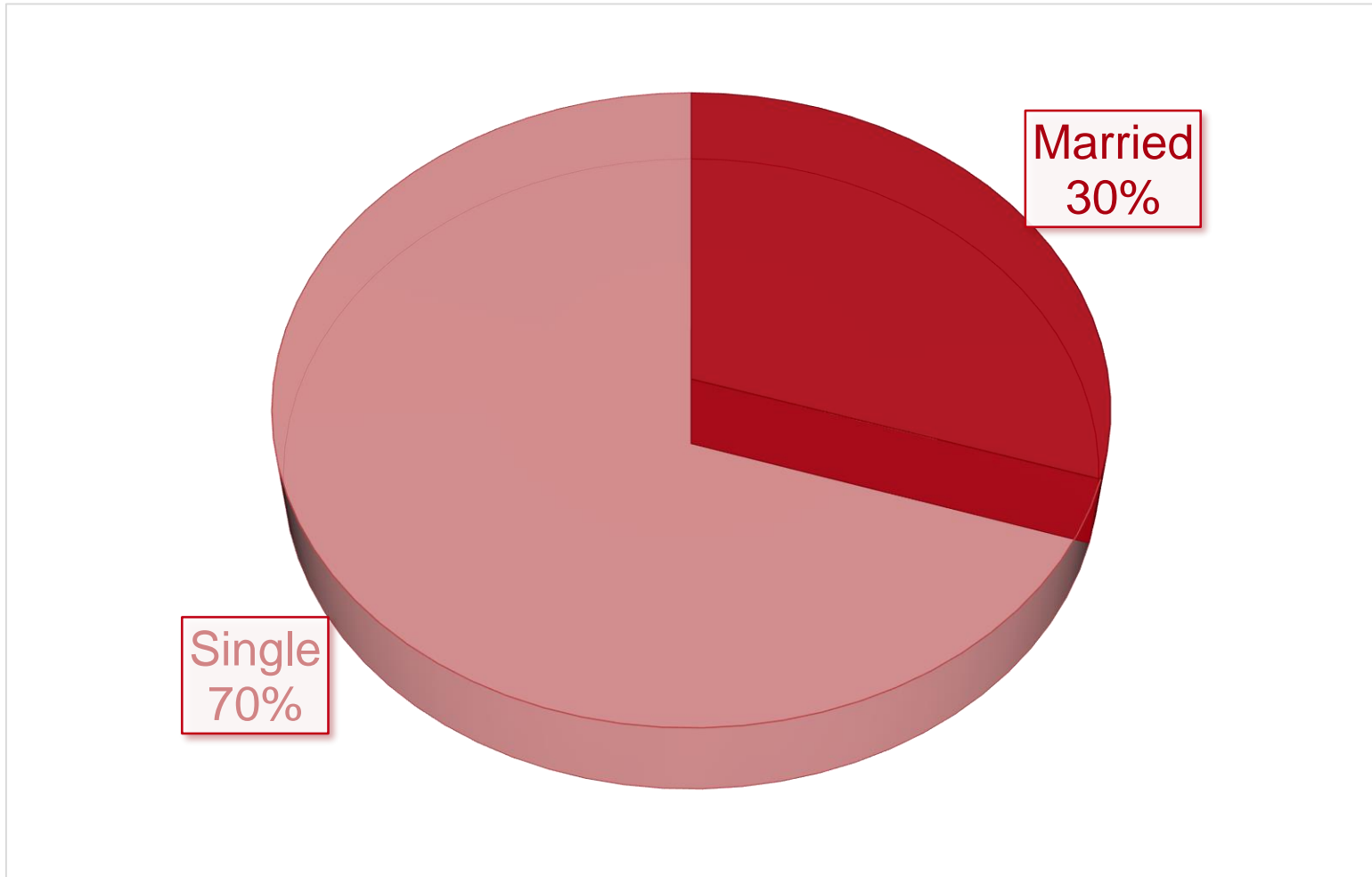


	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Family	39%	41%	42%	47%	26%							
Repeat	39%	37%	48%	54%	35%							
Office Lady	14%	10%	10%	11%	6%							
Wedding	7%	7%	3%	3%	4%							
Silver	6%	5%	3%	4%	5%							
Group	4%	3%	3%	4%	5%							
MICE	4%	4%	4%	3%	4%							

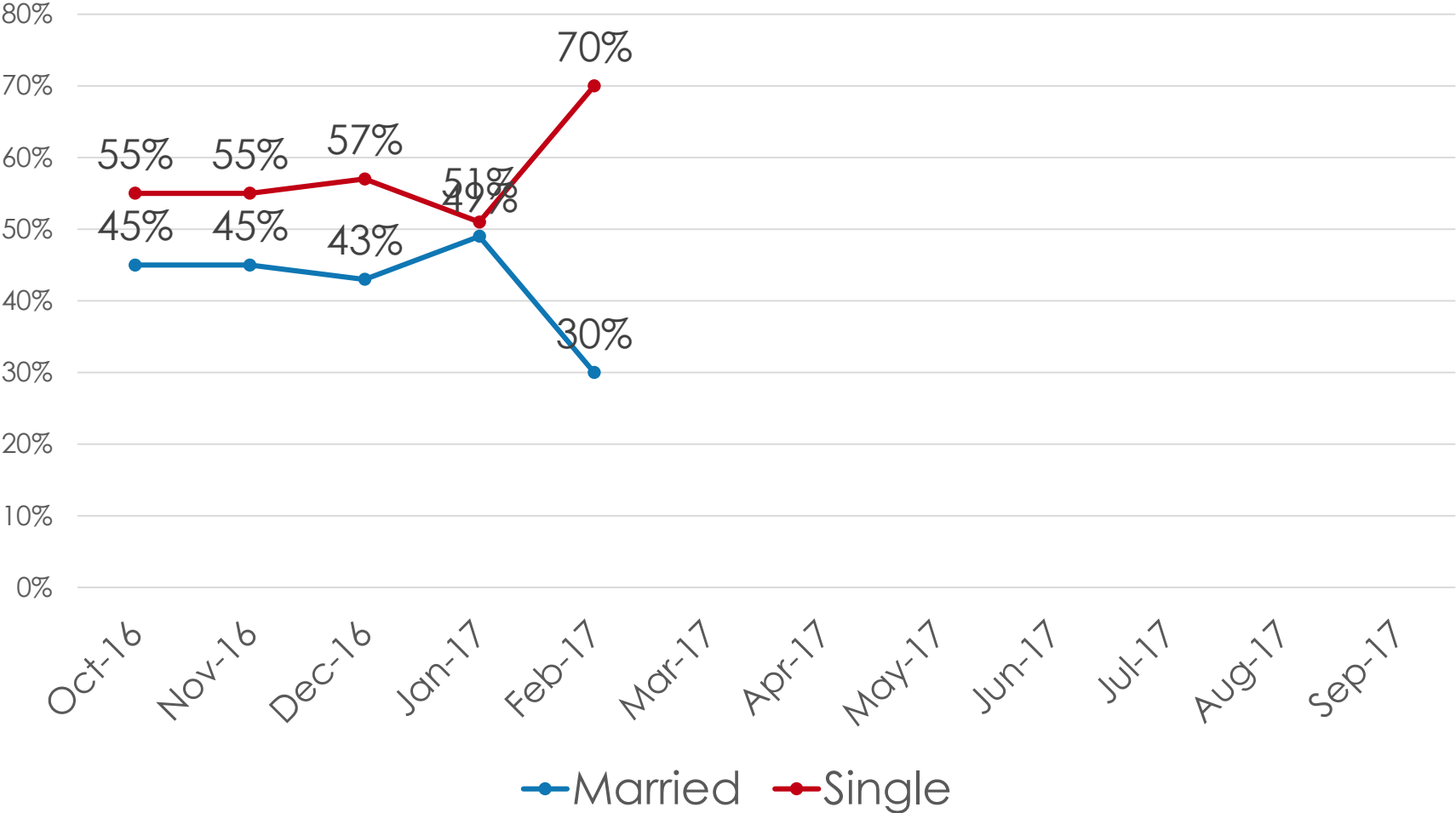
# SECTION 1

# PROFILE OF RESPONDENTS

# Marital Status



# Marital status – FY2017 Tracking





# Marital status – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

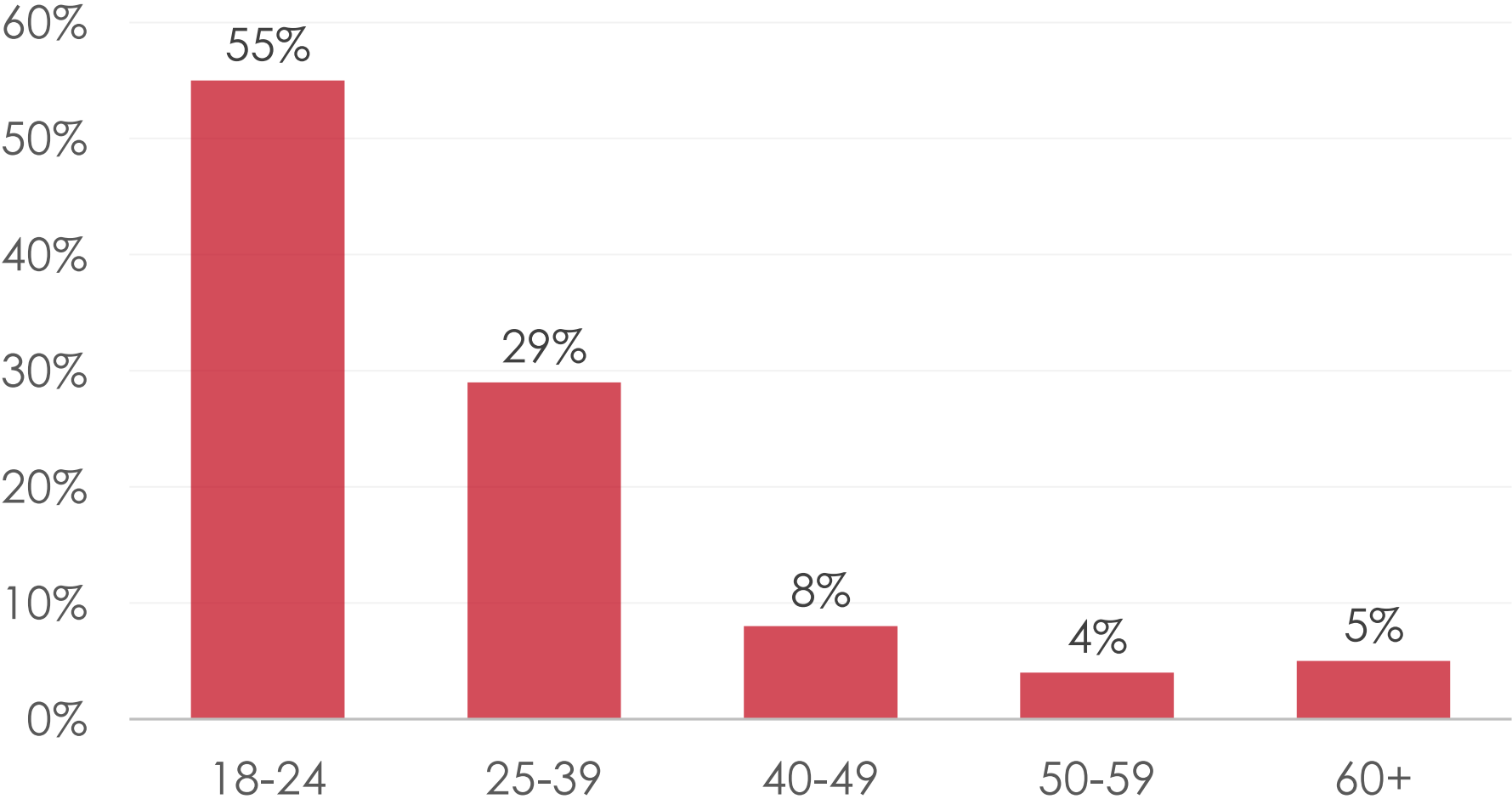
### QE Are you married or single?

		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
QE	Married	30%	85%	32%	13%	94%	80%	42%	43%
	Single	70%	15%	68%	88%	6%	20%	58%	57%
	Total	352	91	22	16	16	15	122	14

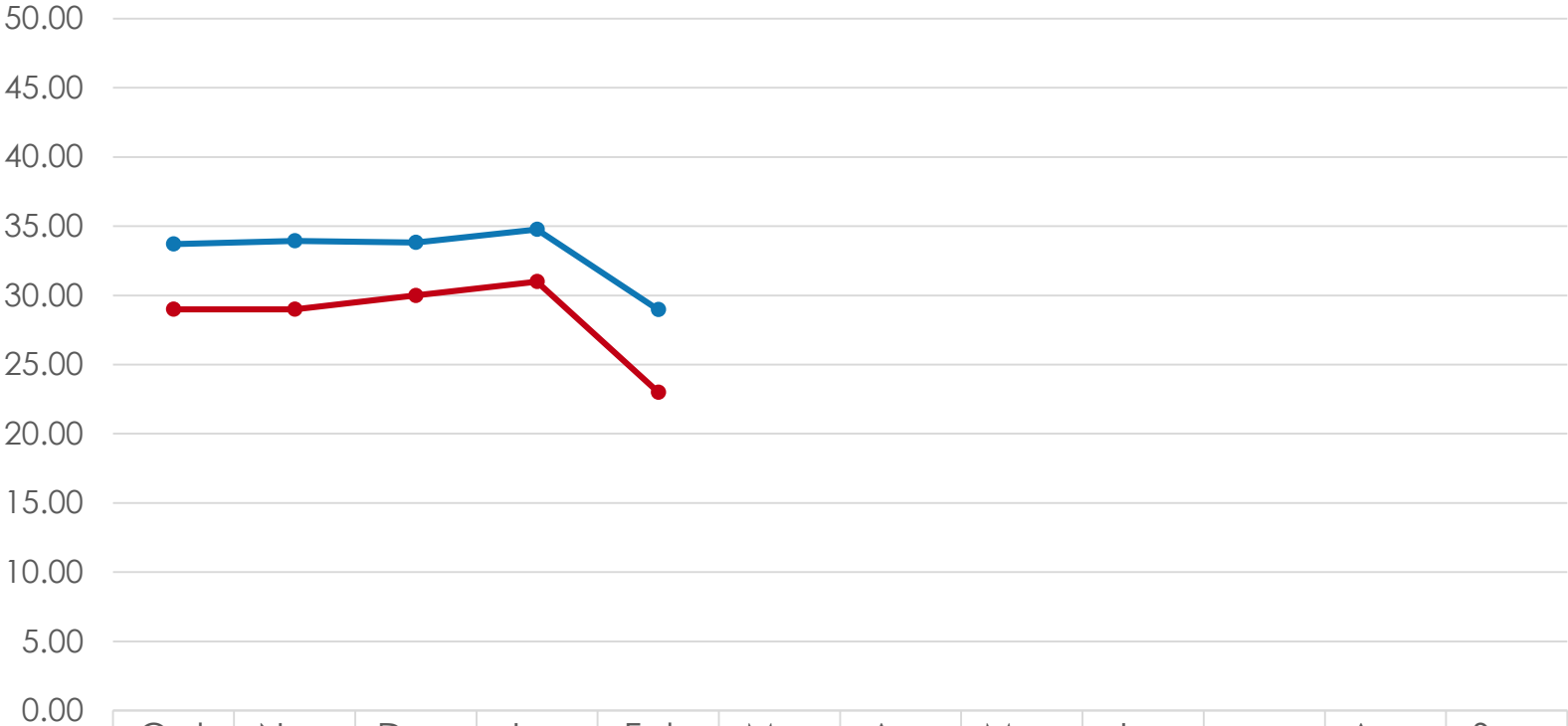
Prepared by QMark Research

# Age

MEAN = 28.97  
MEDIAN = 23



# Age – FY2017 Tracking



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	33.71	33.94	33.83	34.77	28.97							
MEDIAN	29	29	30	31	23							

# Age – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

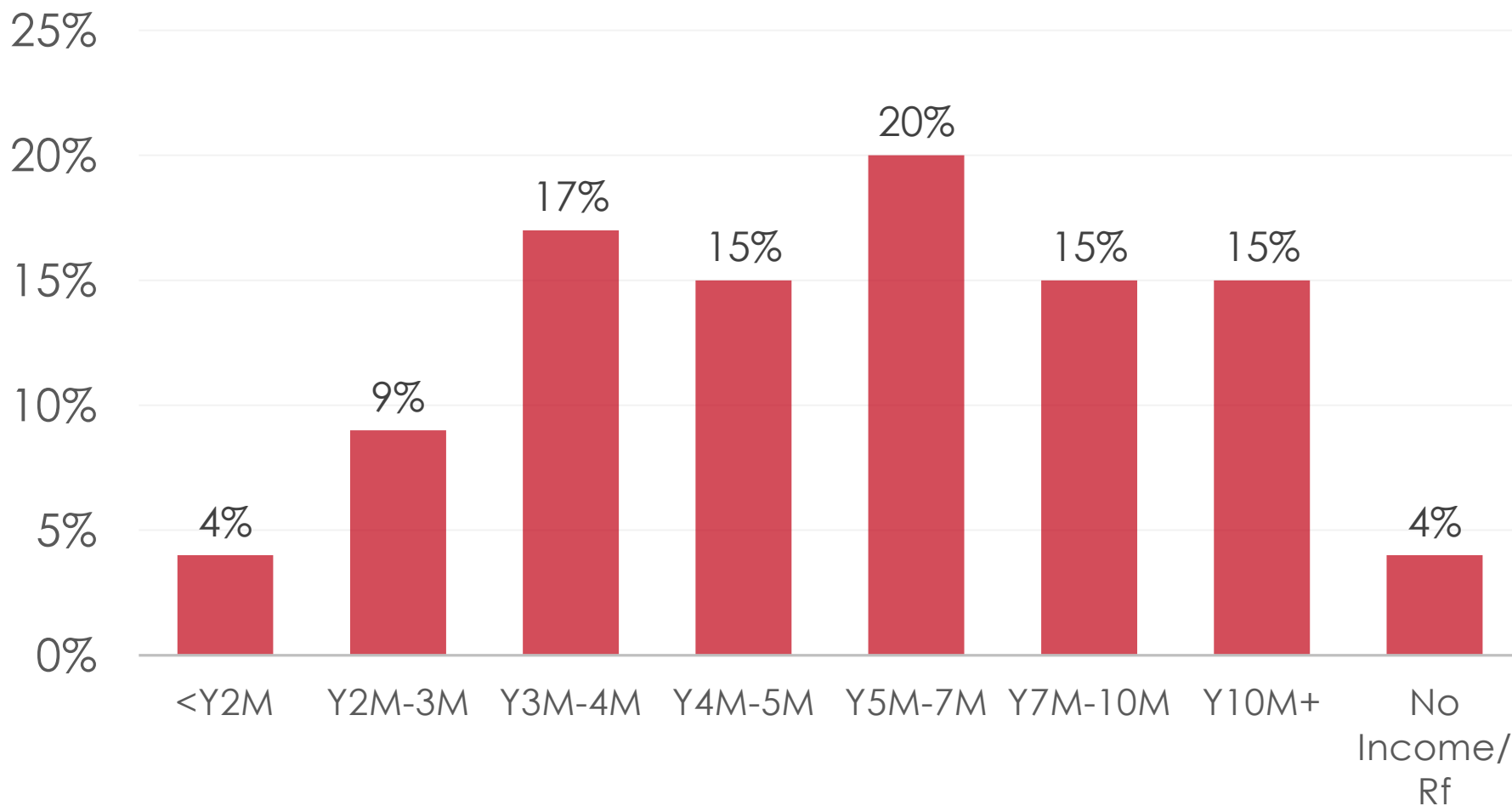
### QF And what was your age on your last birthday?

		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
QF	18-24	55%	8%	5%	63%		7%	34%	14%
	25-39	29%	52%	55%	31%		53%	34%	64%
	40-49	8%	19%	27%	6%		7%	15%	7%
	50-59	4%	10%	14%			20%	7%	7%
	60+	5%	12%			100%	13%	9%	7%
	Total	352	91	22	16	16	15	122	14
QF	Mean	28.97	39.08	37.50	25.38	63.31	39.53	34.11	35.14
	Median	23	35	36	22	63	32	30	33

Prepared by QMark Research

# Annual Household Income

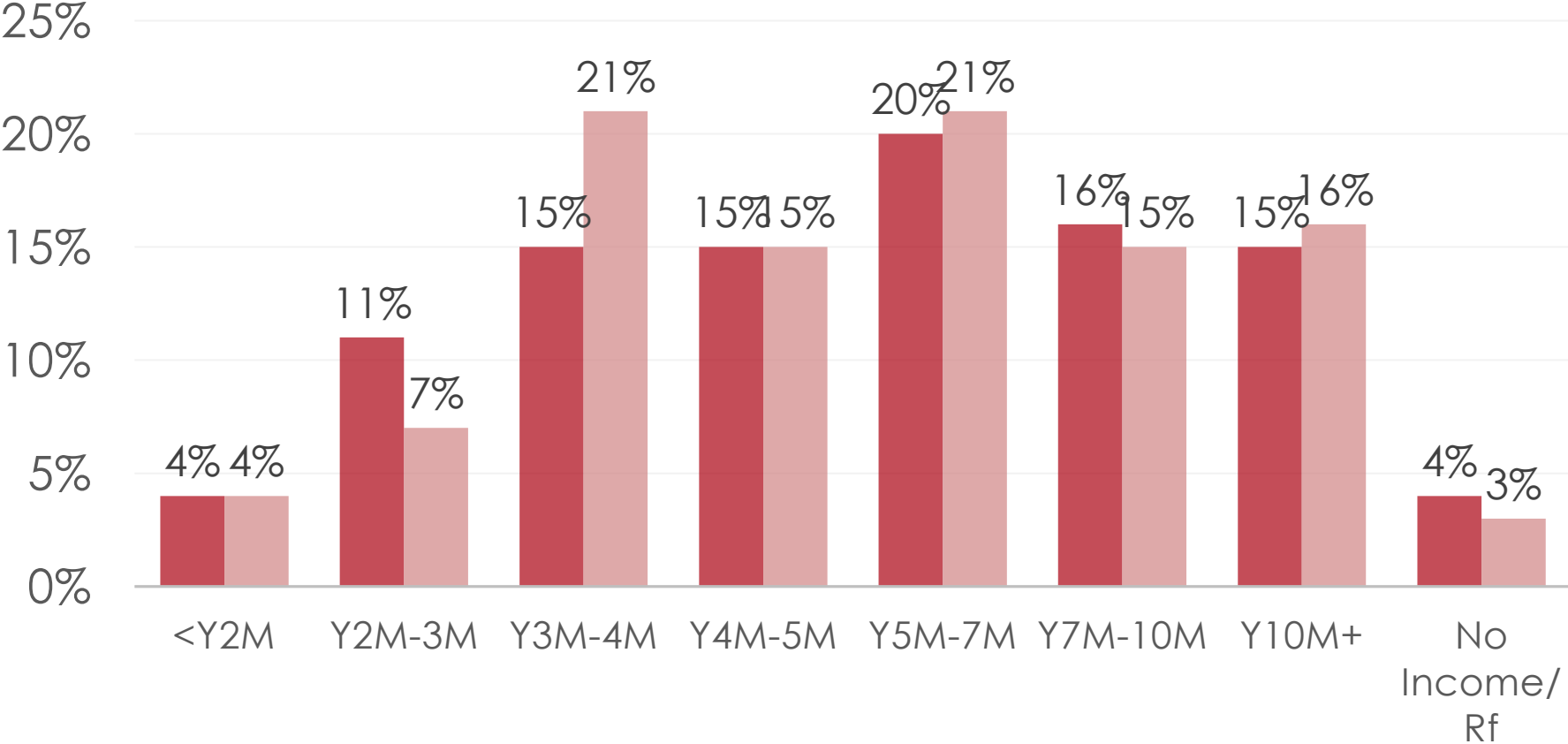
EXCHANGE RATE ¥113.03=\$1



# Annual Household Income

EXCHANGE RATE ¥113.03=\$1

■ 1st Time ■ Repeat



# Annual Household Income – Key Segments

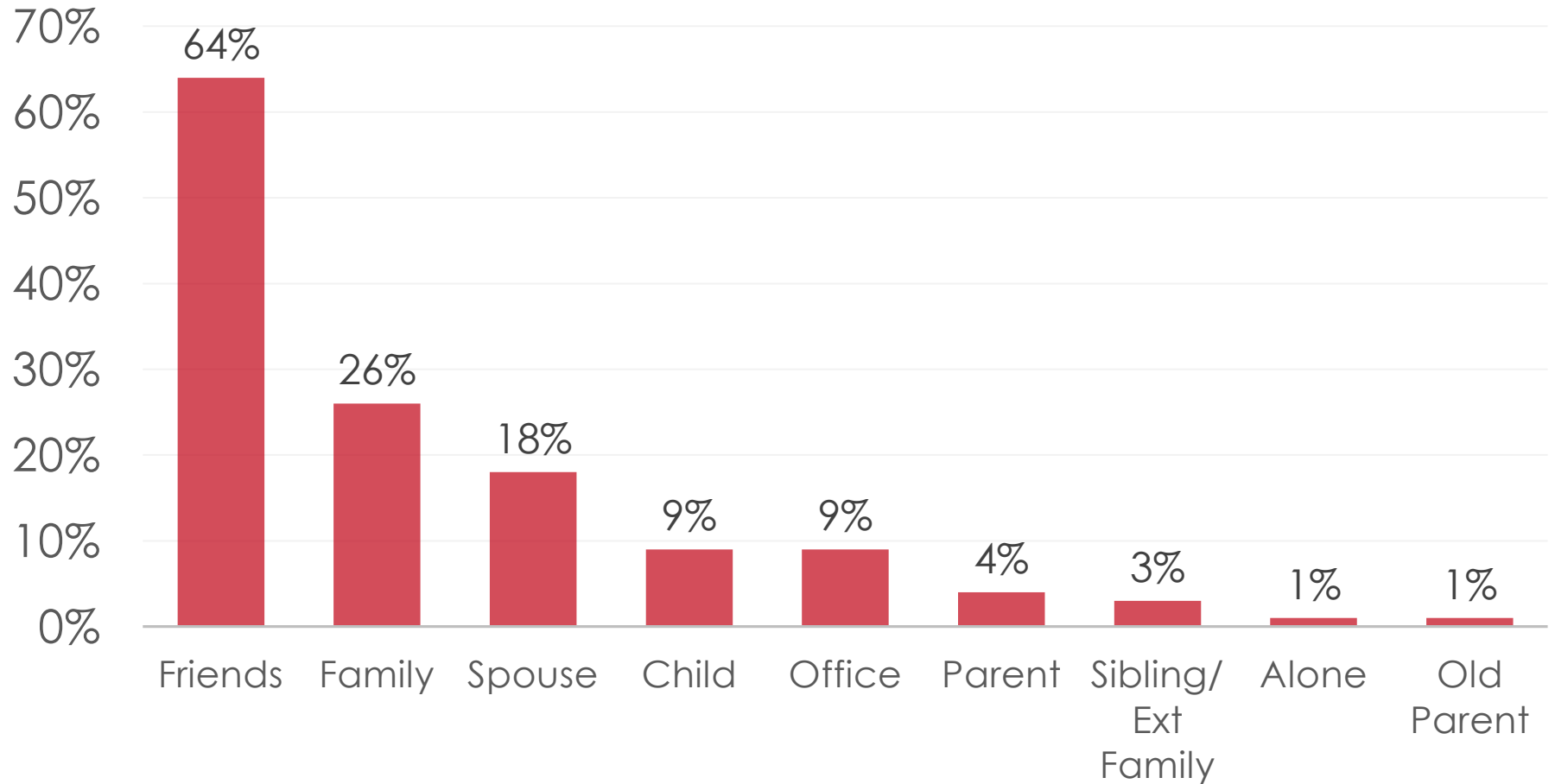
## GUAM VISITORS BUREAU - EXIT SURVEY

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

		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
Q26	<Y2.0 million	4%	1%		8%		7%	4%	8%
	Y2.0M-Y3.0M	9%	5%		8%	13%	7%	7%	8%
	Y3.0M-Y4.0M	17%	16%	19%	23%	13%	7%	21%	23%
	Y4.0M-Y5.0M	15%	11%	24%	31%	13%		15%	15%
	Y5.0M-Y7.0M	20%	27%	29%	23%	25%	40%	21%	23%
	Y7.0M-Y10.0M	15%	23%	19%		19%	33%	15%	
	Y10.0M+	15%	16%	10%		19%	7%	16%	23%
	No Income	4%	1%		8%			3%	
	Total	292	88	21	13	16	15	107	13

Prepared by QMark Research

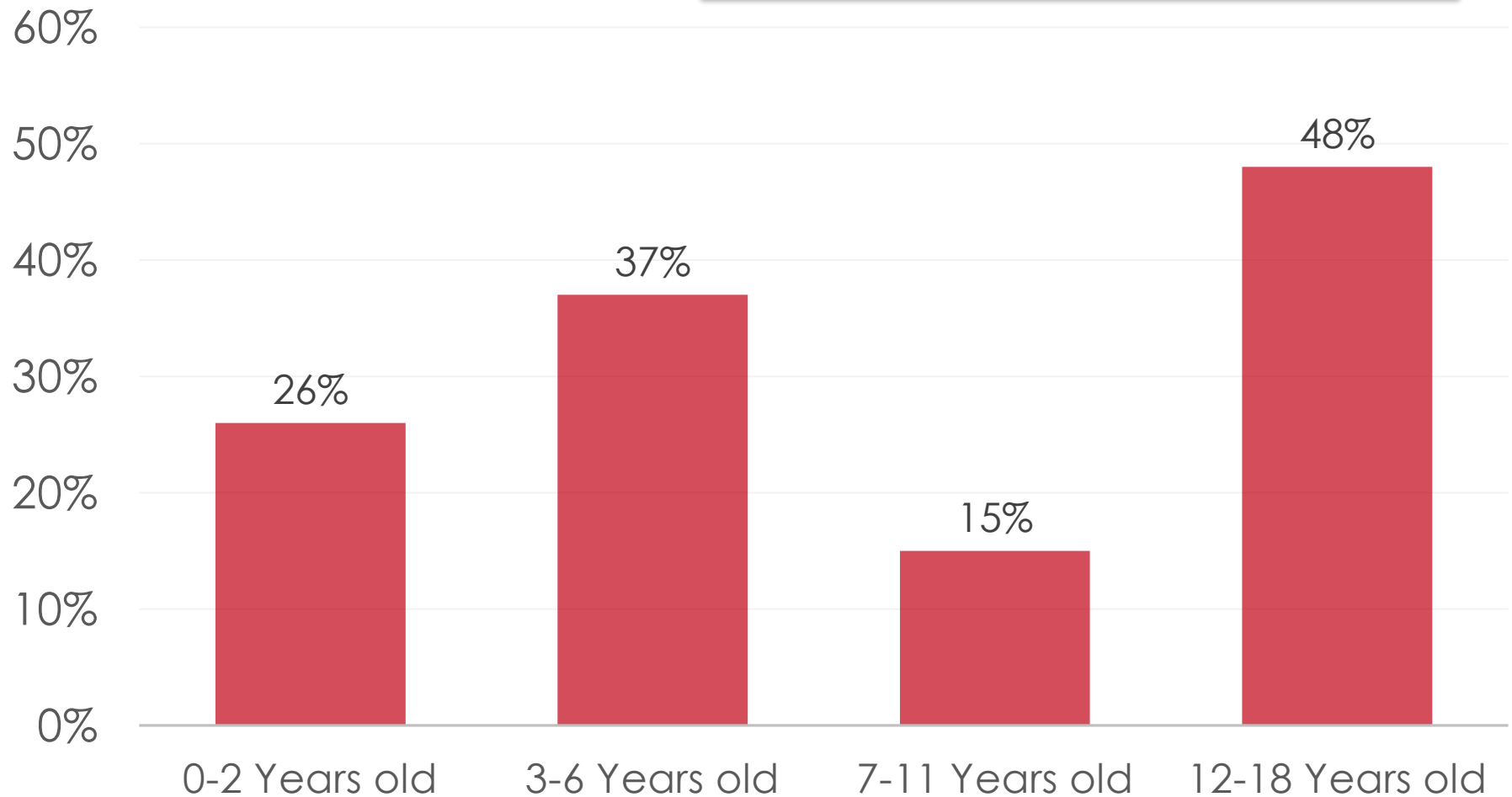
# Travel Party



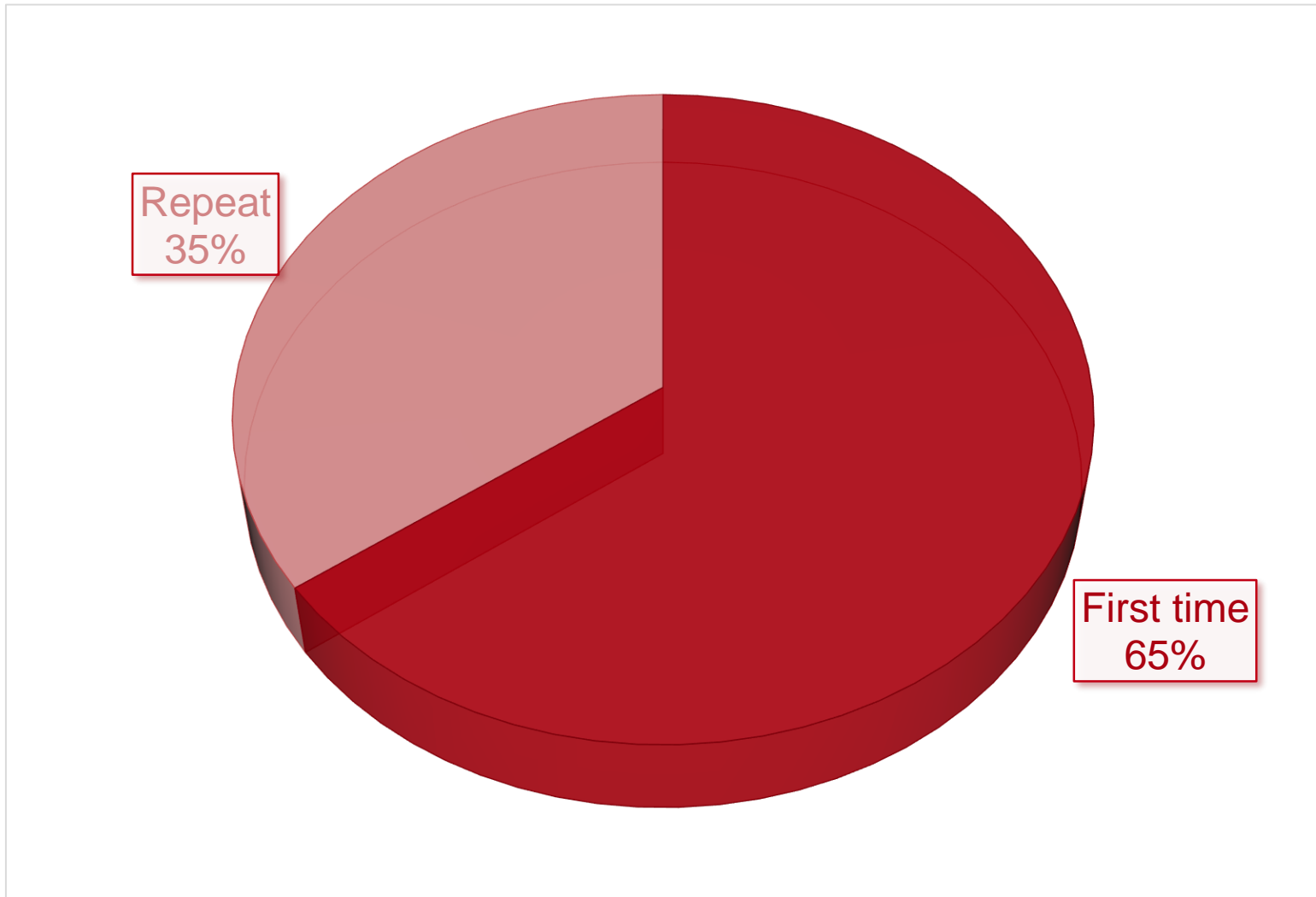


# Travel Party - Children

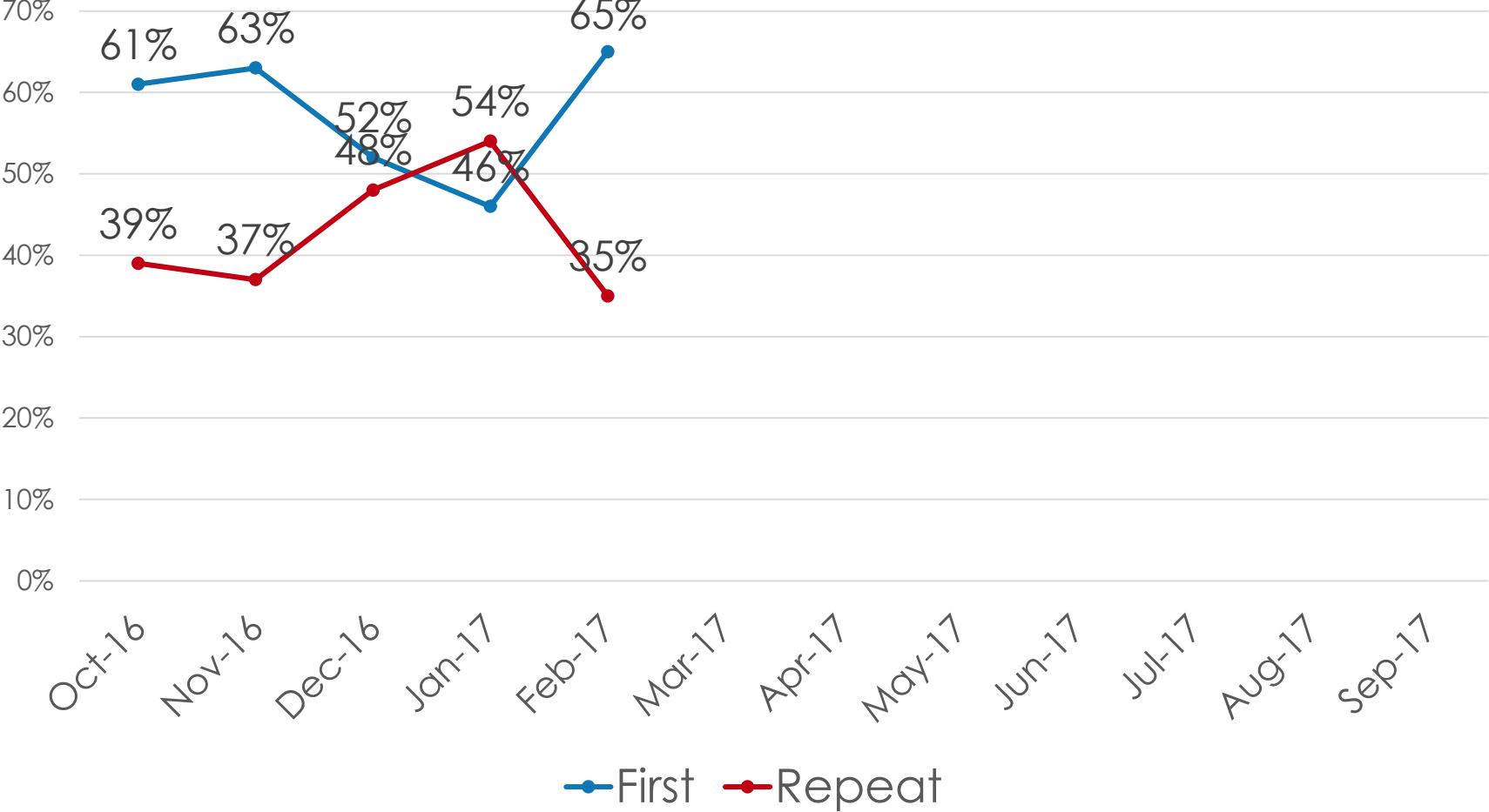
N = 27  
9% TRAVELING WITH A CHILD



# Trips to Guam



# Trips to Guam – FY2017 Tracking



# Trips to Guam – Key Segments

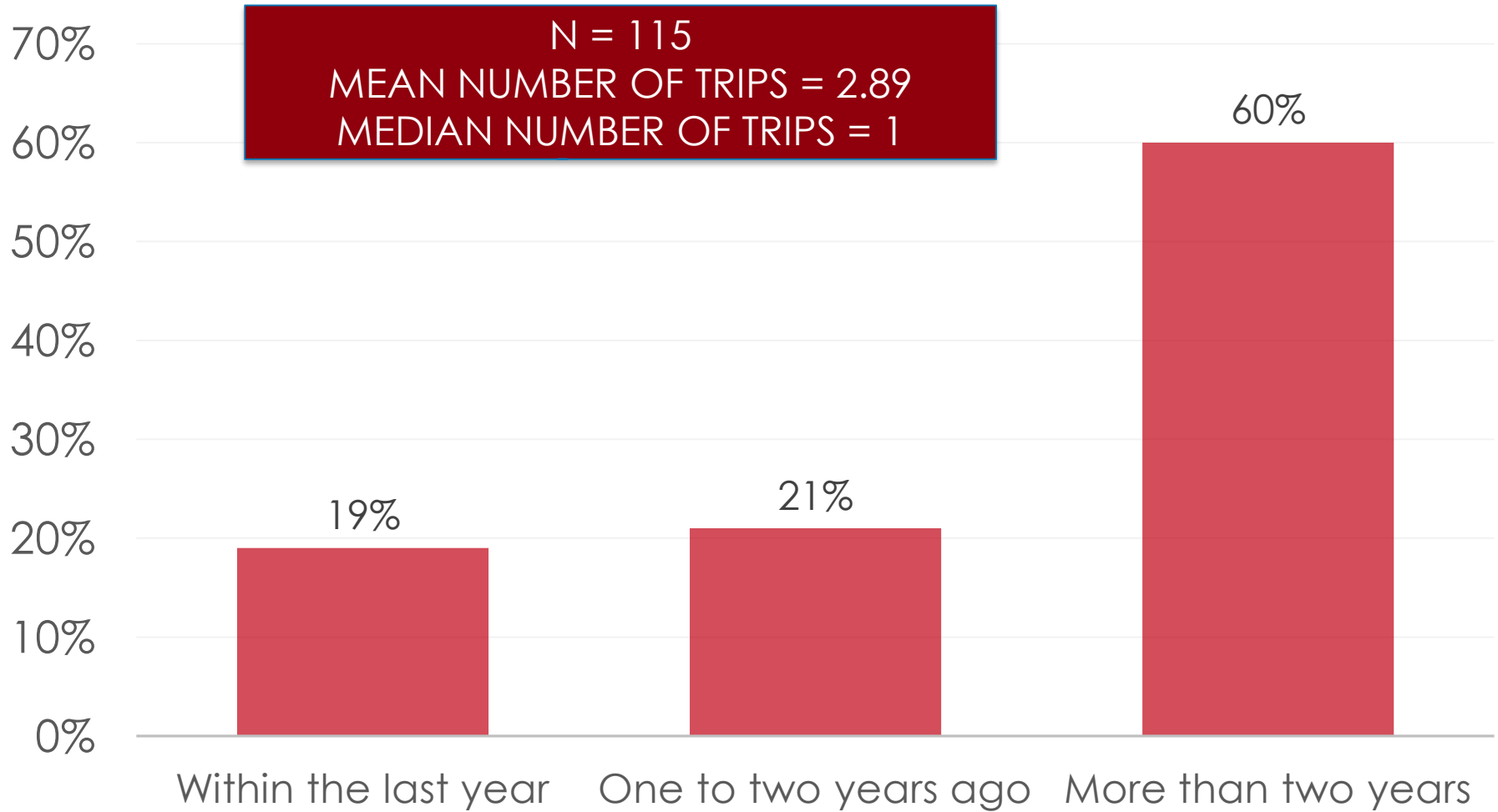
## GUAM VISITORS BUREAU - EXIT SURVEY

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

		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
q3a	Yes	65%	49%	64%	88%	31%	67%		50%
	No	35%	51%	36%	13%	69%	33%	100%	50%
	Total	352	91	22	16	16	15	122	14

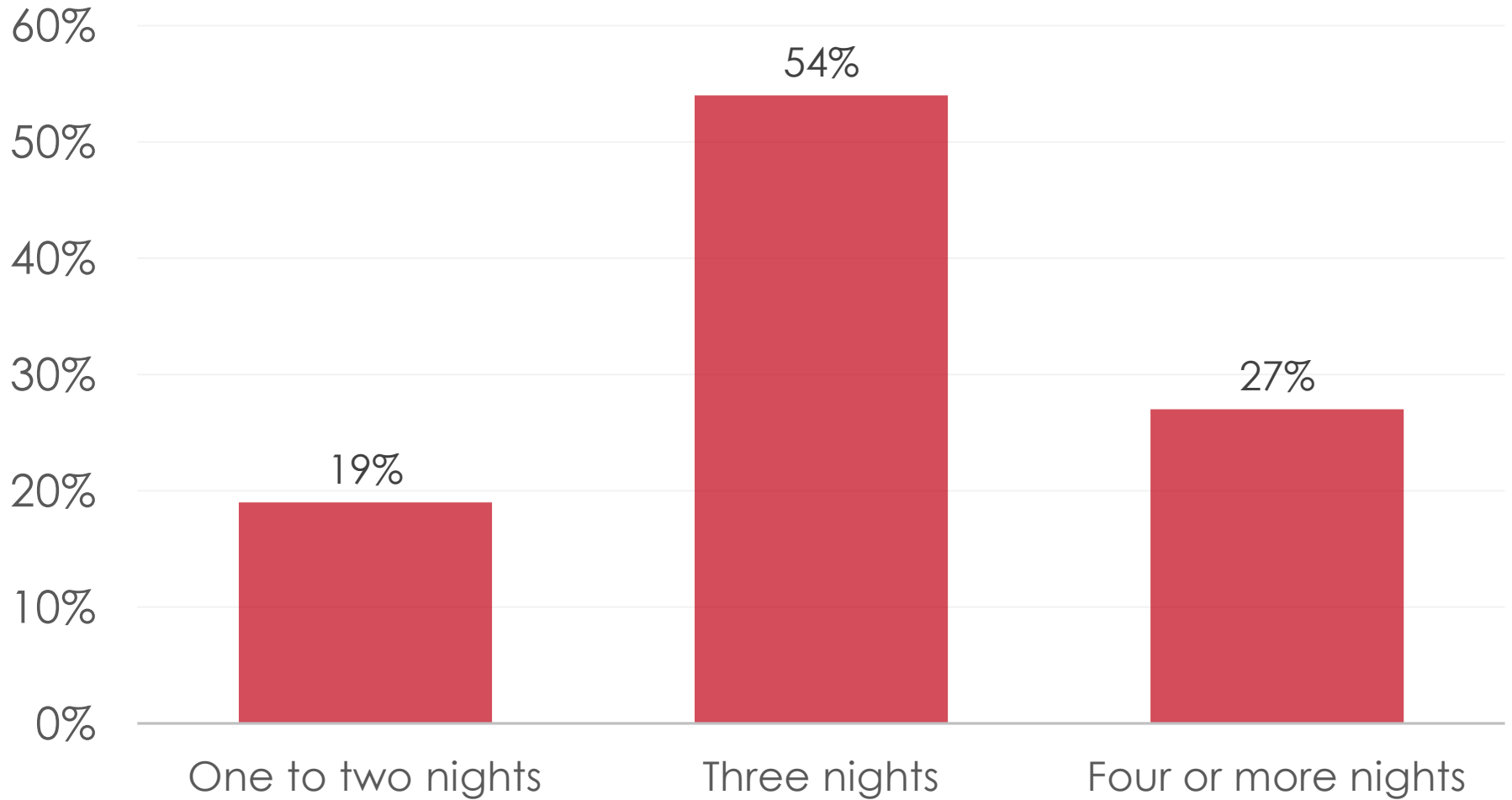
Prepared by QMark Research

# Repeat Visitor- Most Recent Trip

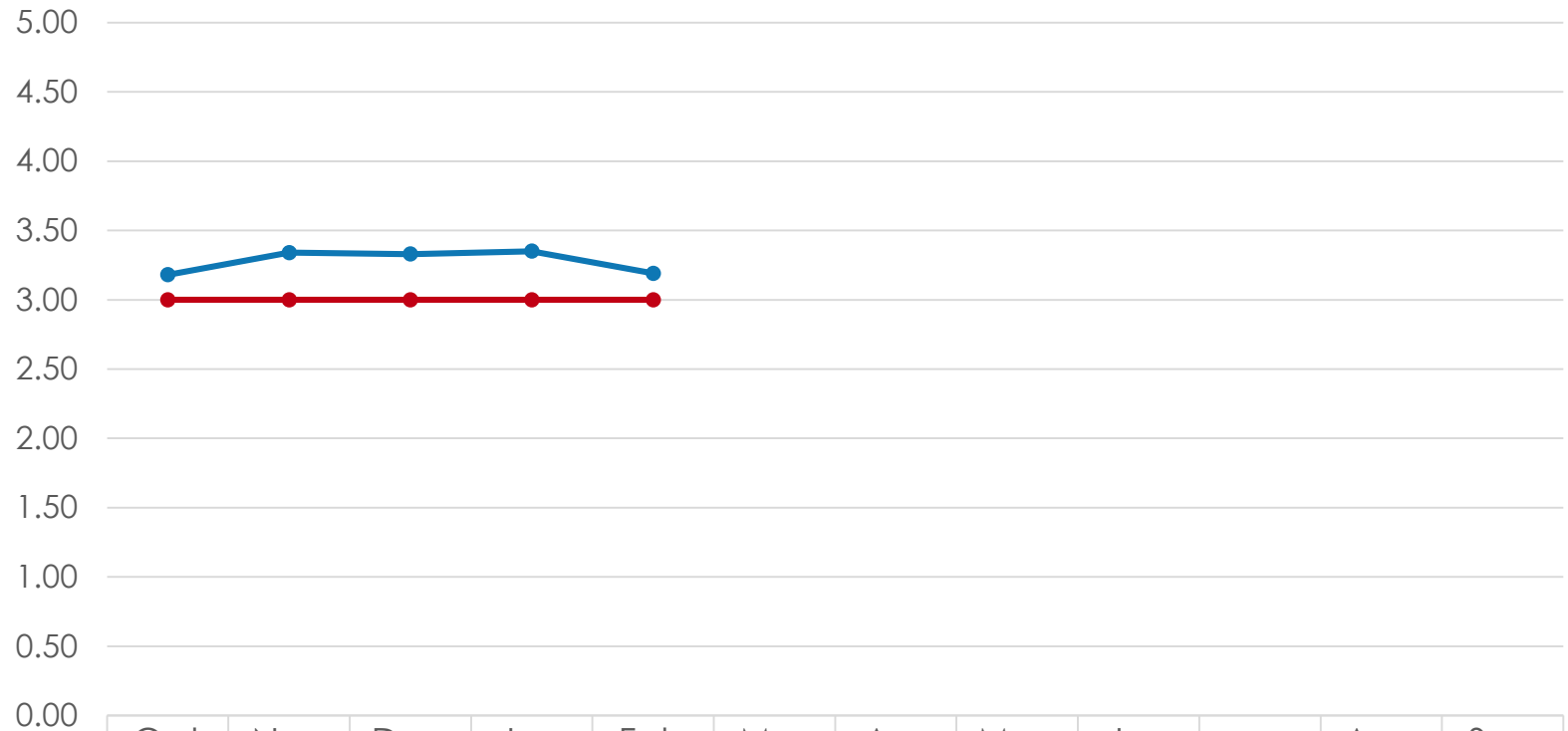


# Length of Stay

MEAN NUMBER OF NIGHTS = 3.19  
MEDIAN NUMBER OF NIGHTS = 3



# Length of Stay – FY2017 Tracking



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	3.18	3.34	3.33	3.35	3.19							
MEDIAN	3	3	3	3	3							

# Length of Stay – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

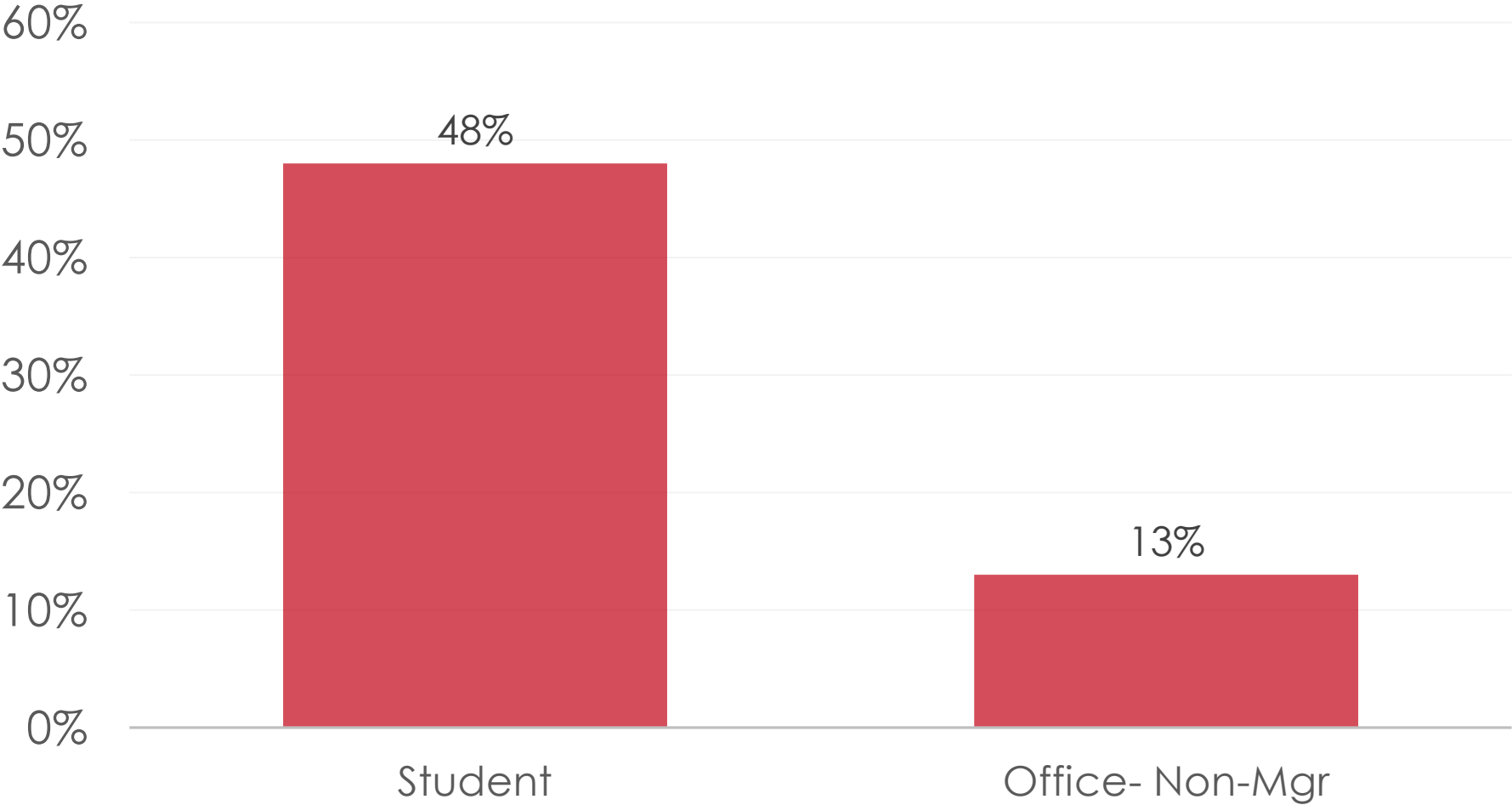
### Q8 How many nights did you stay on Guam?

		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
Q8	1-2	19%	7%	32%	21%	19%	7%	18%	36%
	3	54%	53%	41%	43%	38%	33%	54%	29%
	4+	27%	40%	27%	36%	44%	60%	28%	36%
	Total	339	90	22	14	16	15	118	14
Q8	Mean	3.19	3.58	2.95	3.57	4.06	3.80	3.26	3.36
	Median	3	3	3	3	3	4	3	3

Prepared by QMark Research



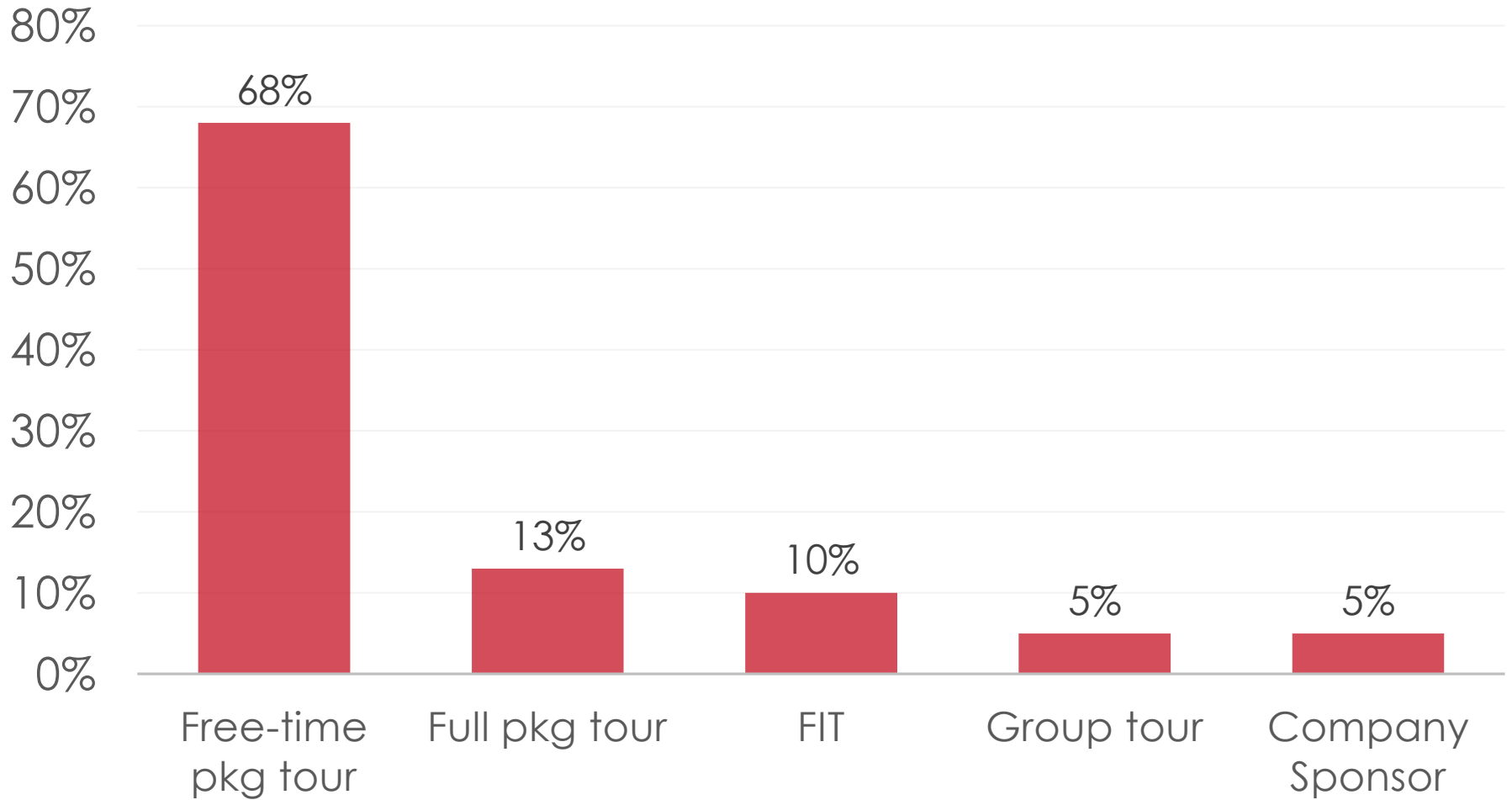
# Occupation – Top Responses (10%+)



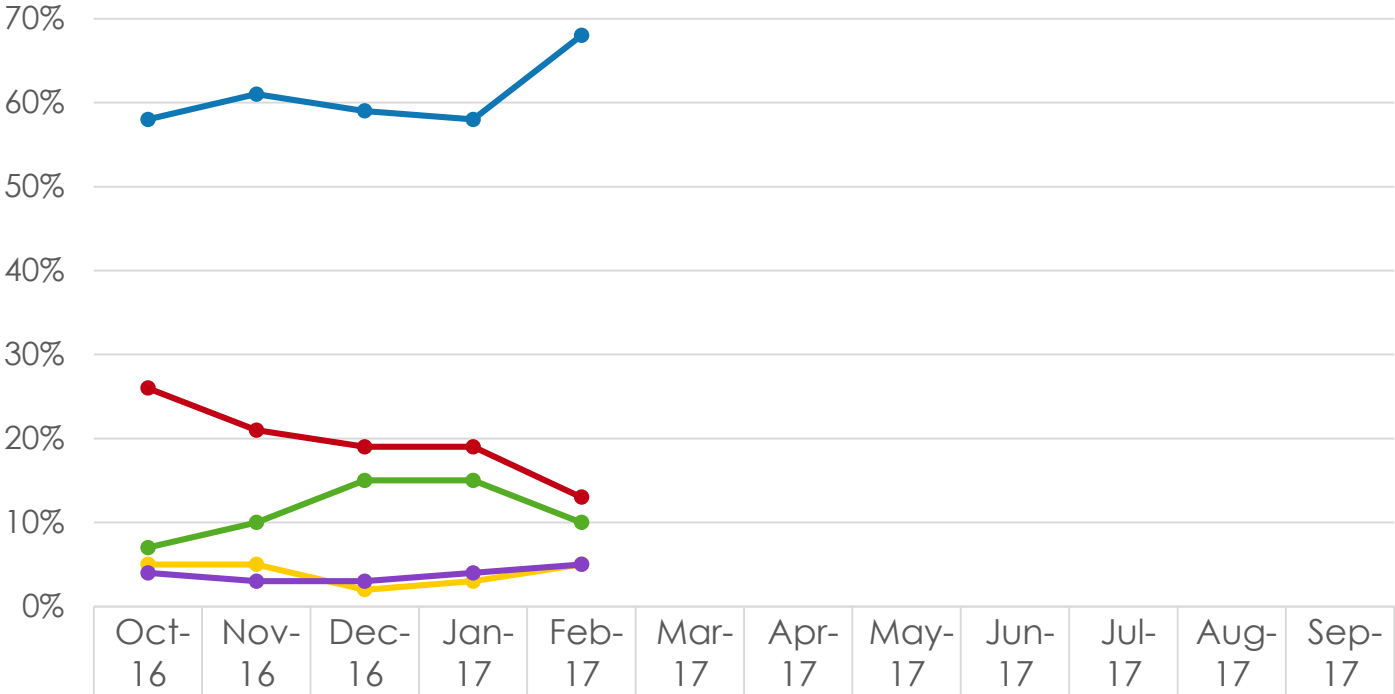
# SECTION 2

# TRAVEL PLANNING

# Travel Planning



# Travel Planning – FY2017 Tracking



Free-time pkg tour	58%	61%	59%	58%	68%							
Full pkg tour	26%	21%	19%	19%	13%							
FIT	7%	10%	15%	15%	10%							
Company	5%	5%	2%	3%	5%							
Group	4%	3%	3%	4%	5%							

# Travel Planning – Key Segments

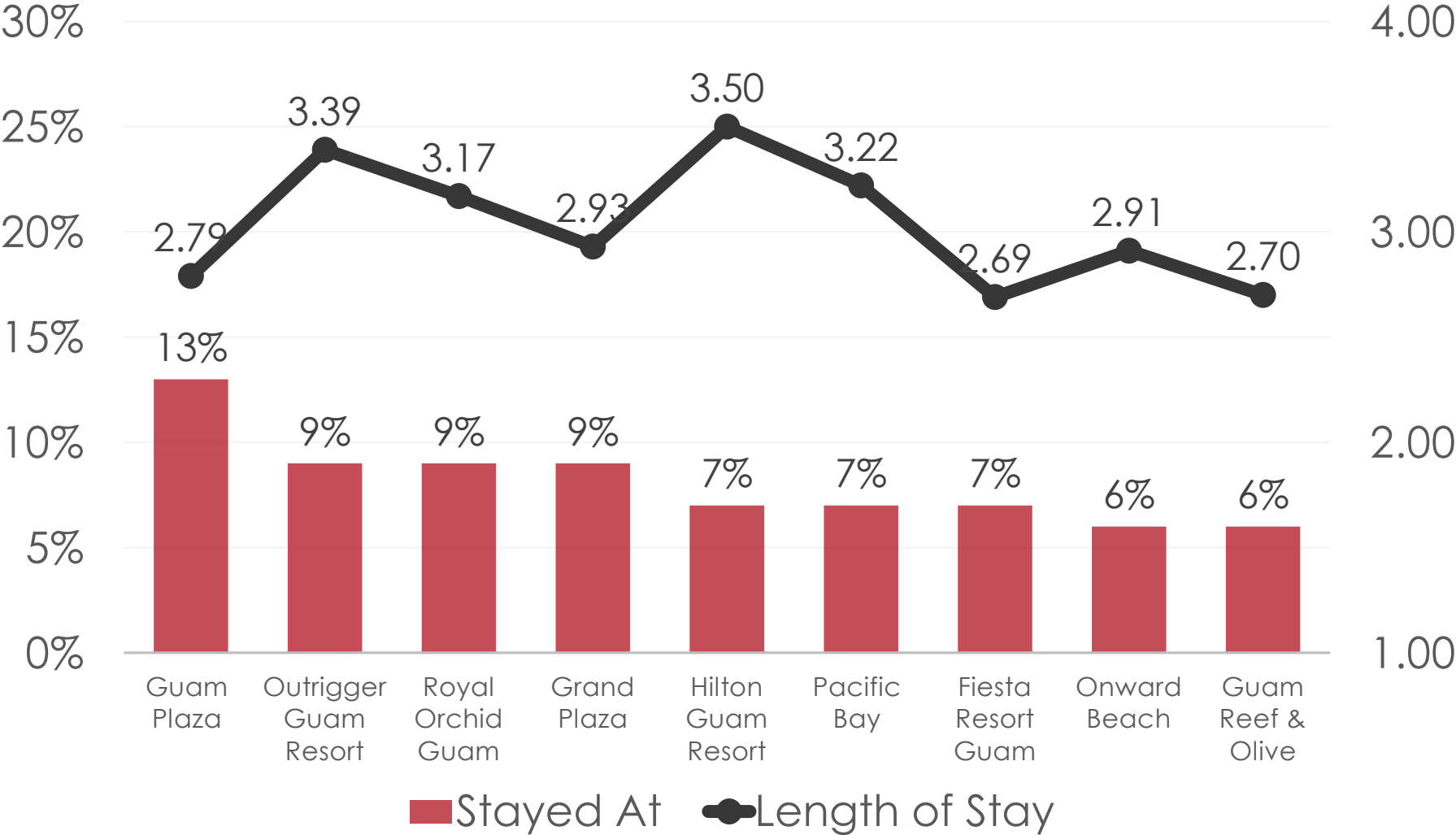
## GUAM VISITORS BUREAU - EXIT SURVEY

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

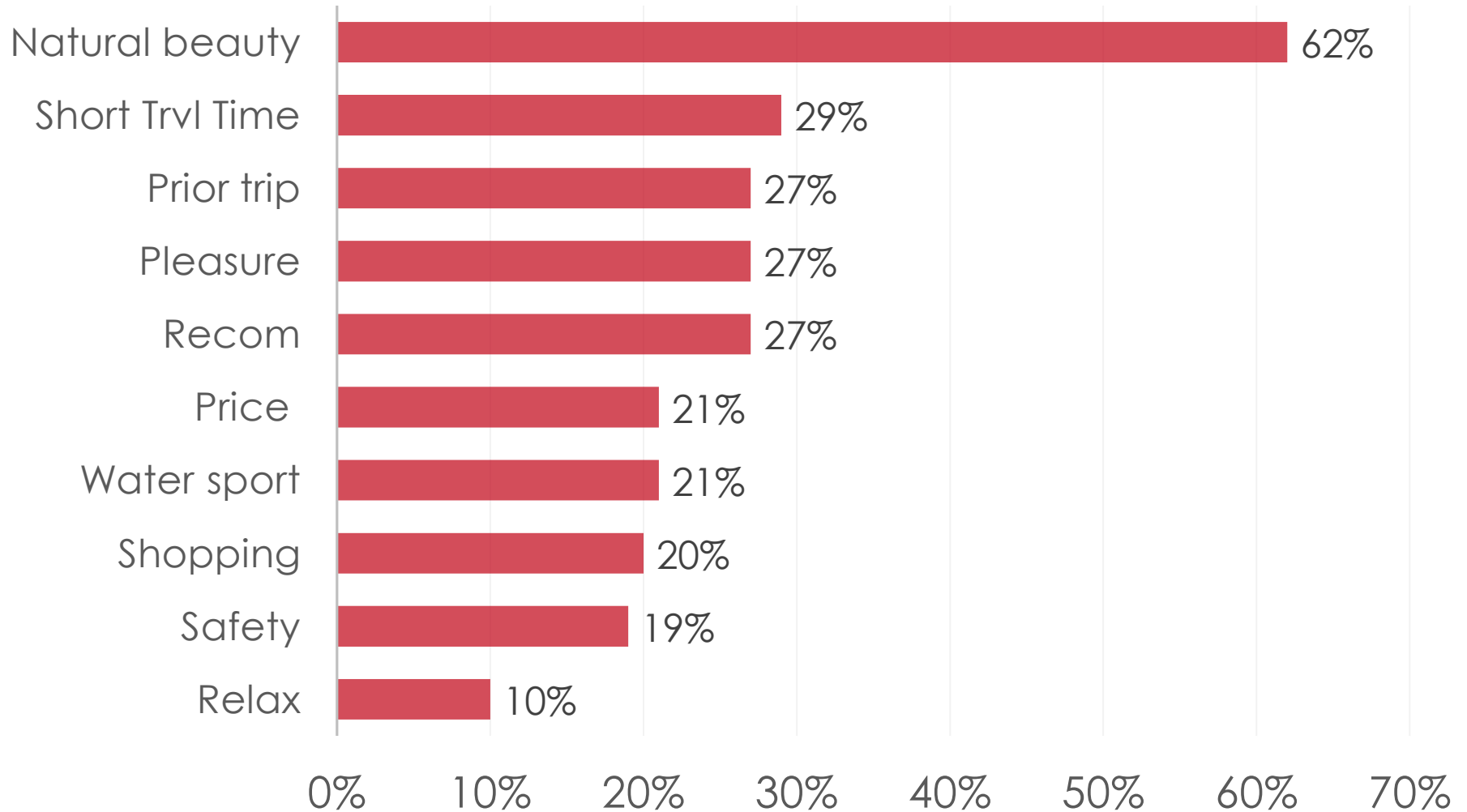
		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
Q7	Free-time package tour	68%	65%	77%		53%	71%	64%	21%
	Full package tour	13%	18%			13%	21%	12%	7%
	Individually arranged travel (FIT)	10%	16%	5%		33%	7%	15%	7%
	Company paid travel	5%	1%	14%				8%	50%
	Group tour	5%		5%	100%			2%	14%
	Total	346	89	22	16	15	14	120	14

Prepared by QMark Research

# Accommodations (Top Responses)



# Travel Motivation (Top Responses)



# Travel Motivation – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

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

		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
Q5A	Natural beauty	62%	55%	77%	44%	44%	33%	54%	14%
	Short travel time	29%	48%	32%	13%	31%	33%	31%	21%
	Pleasure	27%	22%	5%	44%	38%	13%	24%	14%
	Previous trip	27%	44%	36%	13%	44%	27%	79%	36%
	Recomm- friend/family/trvl agnt	27%	19%	27%	31%	25%		22%	14%
	Price	21%	12%	23%	19%			11%	14%
	Water sports	21%	13%	14%	13%		7%	12%	
	Shopping	20%	13%	32%	6%	6%	20%	16%	7%
	Safe	19%	23%	18%	13%	19%	7%	16%	21%
	Relax	10%	12%	14%		13%	13%	14%	7%
	Company/ Business Trip	8%	2%	18%	44%	6%		11%	64%
	Scuba	5%	4%			6%	7%	3%	
	Honeymoon	5%	16%	5%			20%	5%	
	Golf	5%	5%			38%		8%	21%
	Married/ Attn wedding	4%	15%			13%	100%	4%	
	Visit friends/ Relatives	3%						1%	
	Company Sponsored	3%	1%		13%	6%		5%	79%
	Other	2%	1%		6%	6%		1%	
	Organized sports	1%	2%			13%		2%	
	Convention/ Trade/ Conference	1%	1%					1%	21%
	Career Cert/ Testing	1%	2%				13%	1%	
	Total	351	91	22	16	16	15	122	14

Prepared by QMark Research



# SECTION 3

# EXPENDITURES

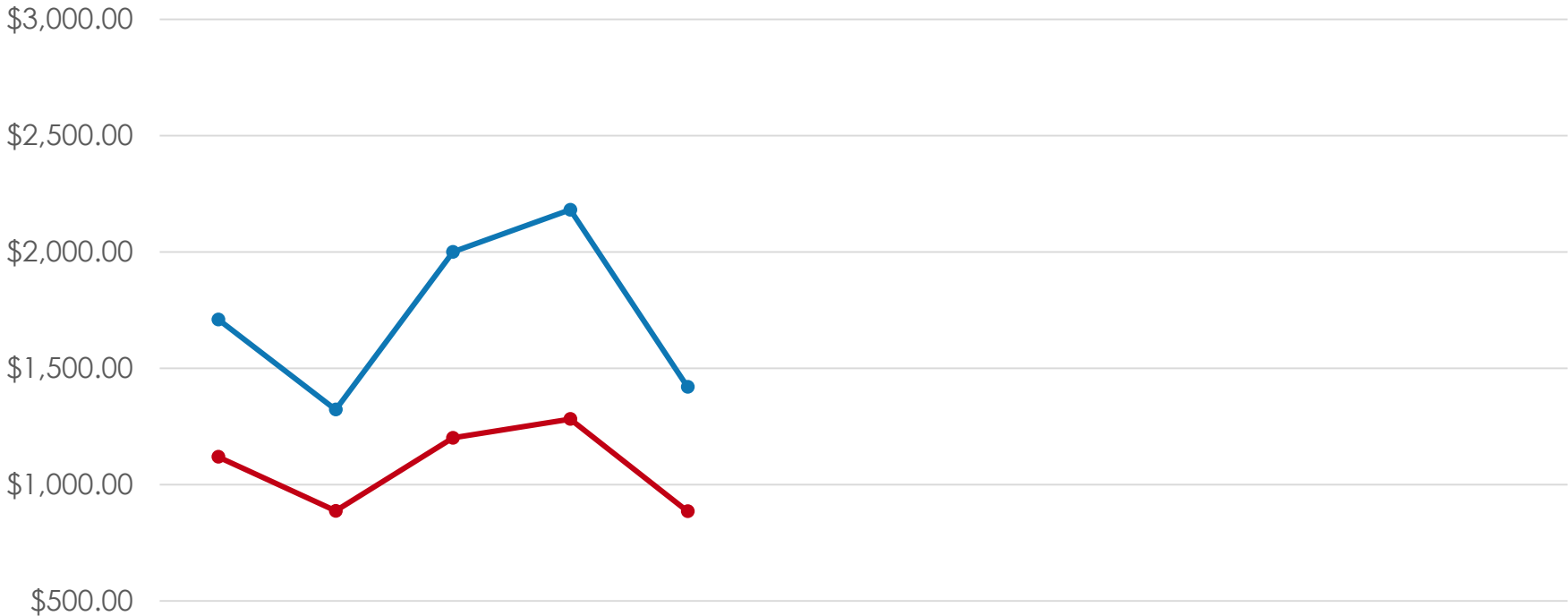
# Prepaid Expenditures

EXCHANGE RATE ¥113.03=\$1

- \$1,419.43 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$850.86 = overall mean average per person prepaid expenditures

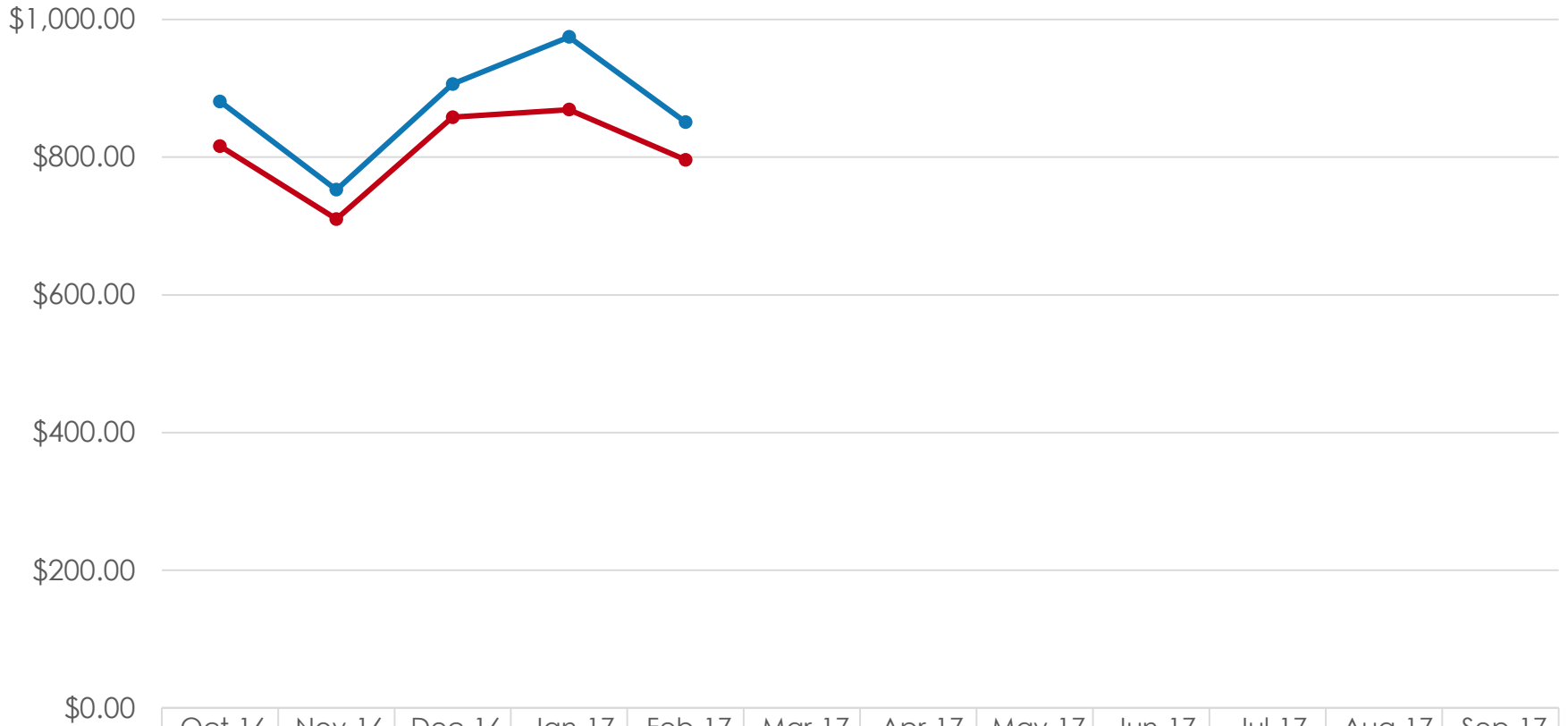
# Prepaid Entire Travel Party – FY2017

## Tracking



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	\$1,709.45	\$1,322.66	\$2,000.40	\$2,181.10	\$1,419.43							
MEDIAN	\$1,119.00	\$887.00	\$1,201.00	\$1,282.00	\$885.00							

# Prepaid Per Person– FY2017 Tracking



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	\$880.84	\$752.63	\$906.16	\$974.56	\$850.86							
MEDIAN	\$816.00	\$710.00	\$858.00	\$869.00	\$796.00							

# Prepaid Per Person– Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

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

### PER PERSON

		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
PREPAID PP	Mean	\$850.86	\$1,086.43	\$859.46	\$766.39	\$1,190.61	\$1,152.81	\$794.42	\$503.97
	Median	\$796	\$1,003	\$925	\$708	\$995	\$1,106	\$708	\$155

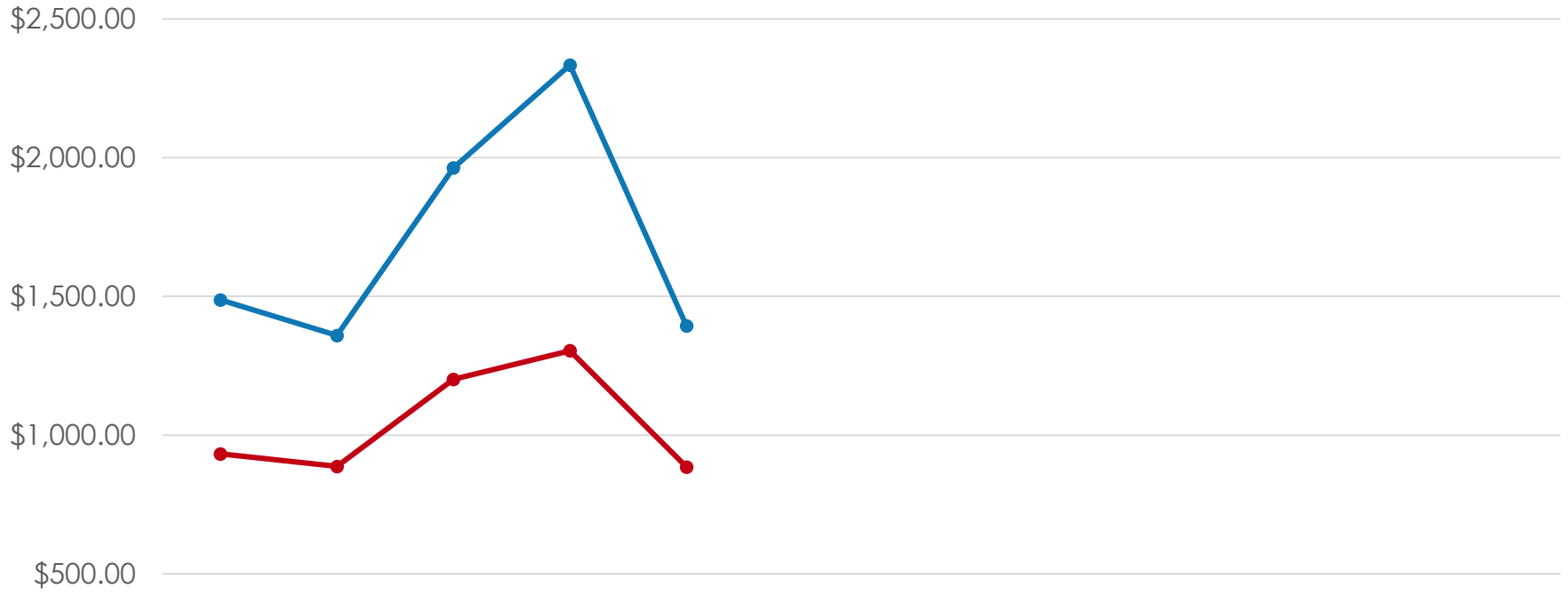
Prepared by QMark Research

# Prepaid Expenses by Category – Mean Entire Travel Party



# Prepaid- FY2017 Tracking

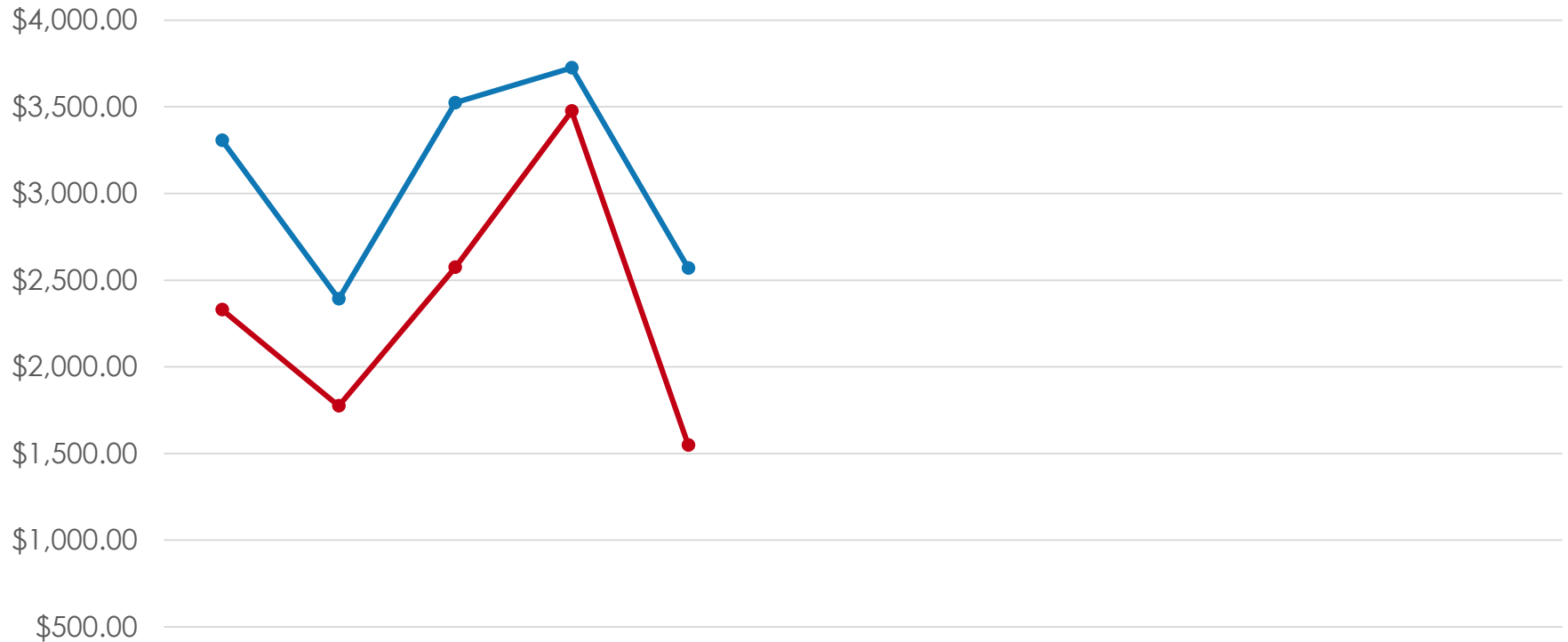
## Airfare & Accommodation Packages



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	\$1,487.33	\$1,358.94	\$1,963.53	\$2,333.78	\$1,393.03							
MEDIAN	\$932.00	\$887.00	\$1,201.00	\$1,304.00	\$885.00							

# Prepaid– FY2017 Tracking

## Airfare & Accommodation W/ Meal Packages

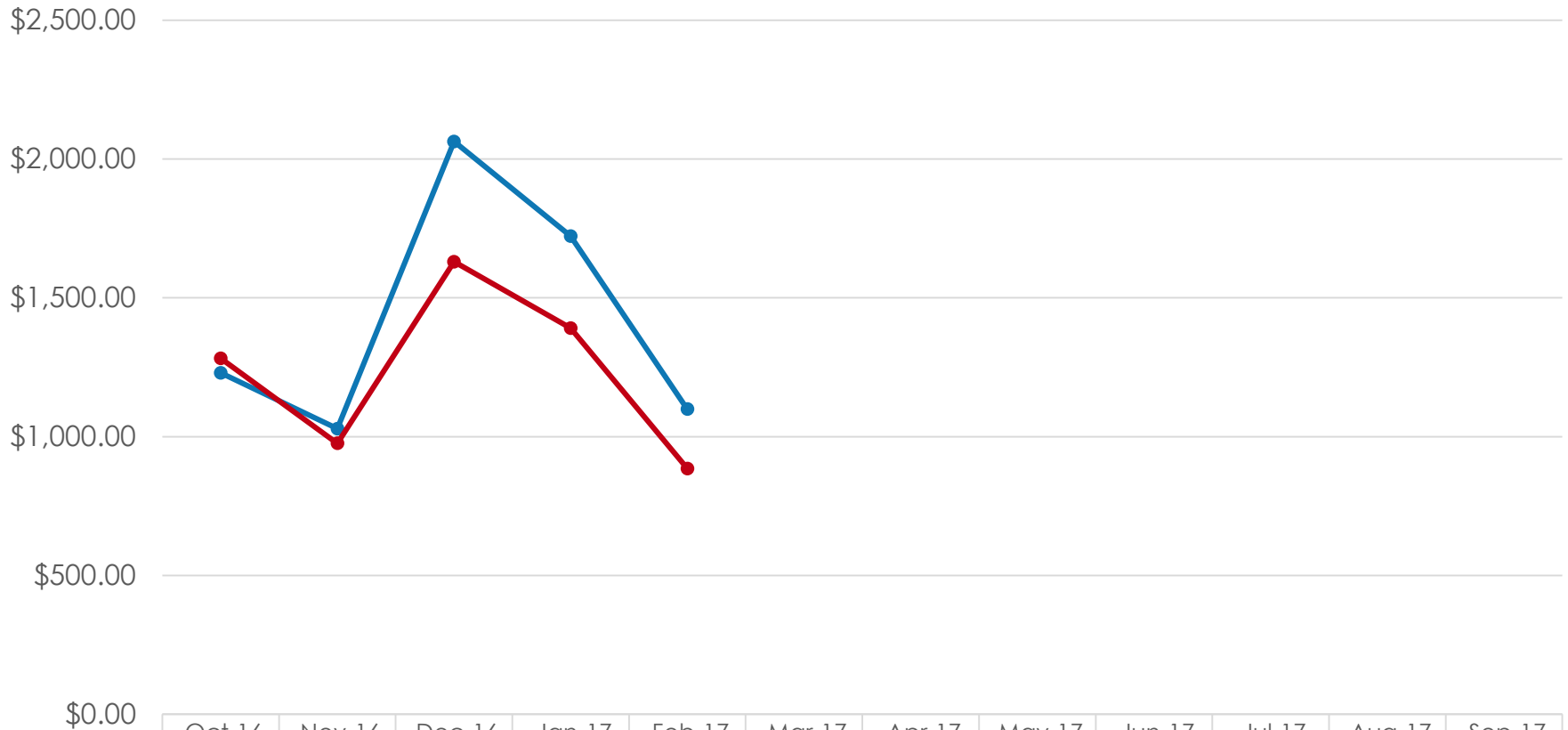


	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	\$3,306.88	\$2,391.87	\$3,524.35	\$3,725.09	\$2,569.10							
MEDIAN	\$2,330.00	\$1,775.00	\$2,574.00	\$3,476.00	\$1,548.00							



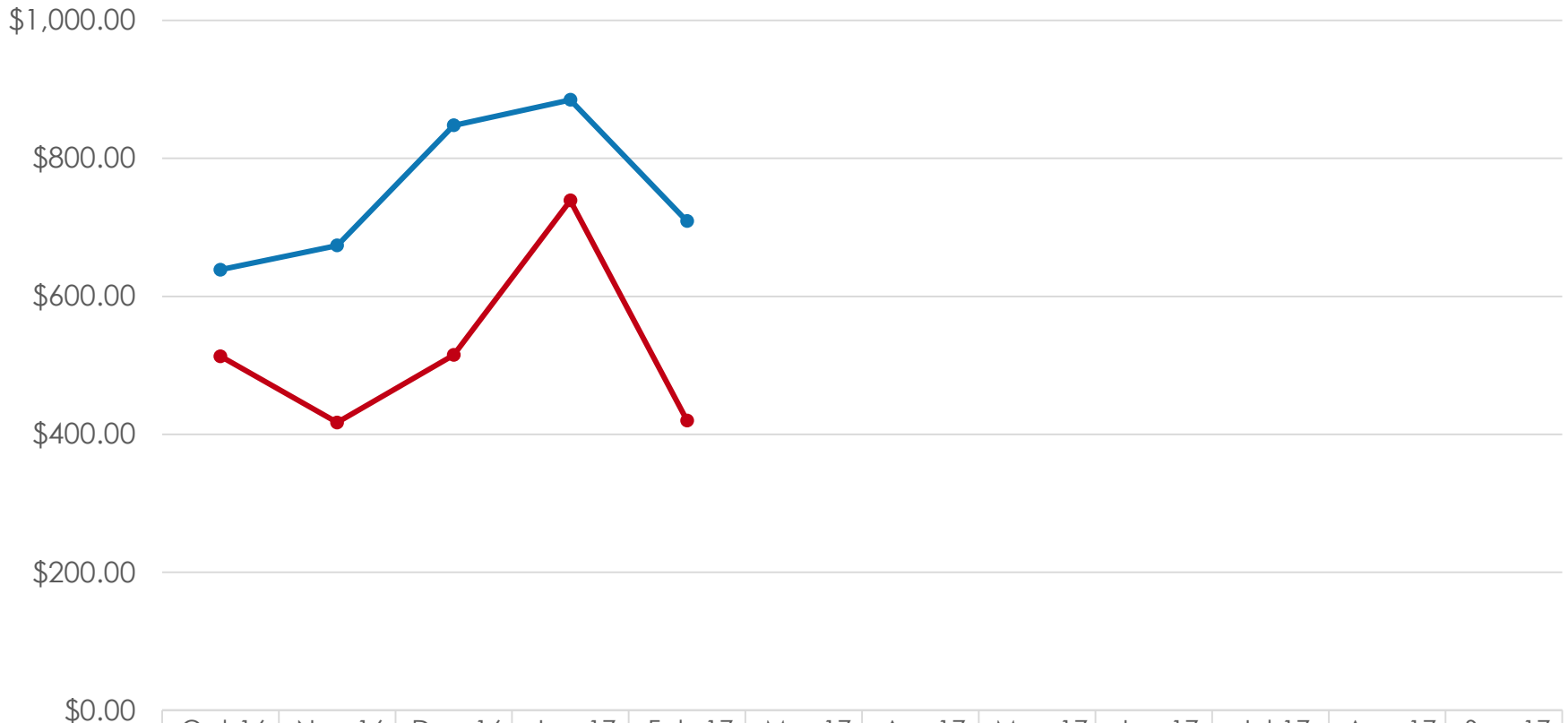
# Prepaid- FY2017 Tracking

## Airfare Only

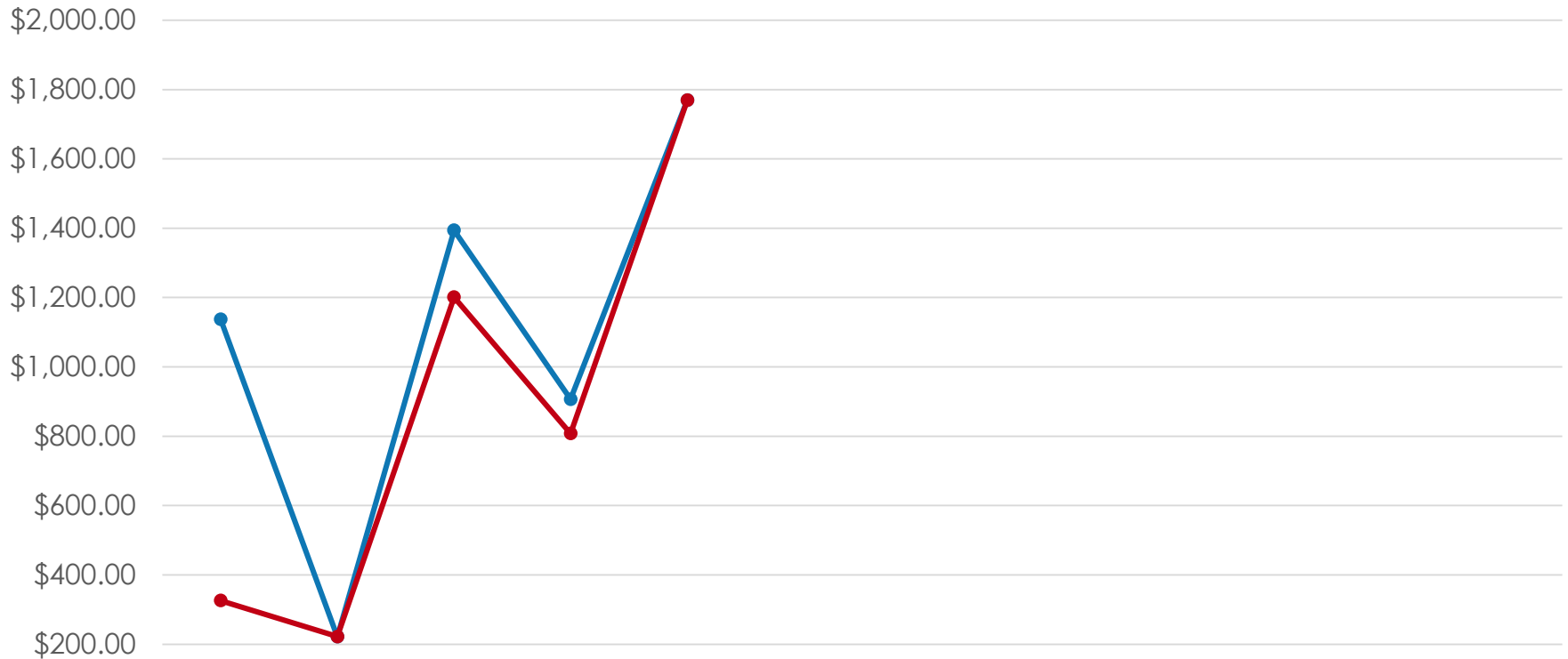


	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	\$1,229.97	\$1,028.87	\$2,063.14	\$1,722.42	\$1,099.10							
MEDIAN	\$1,282.00	\$976.00	\$1,630.00	\$1,391.00	\$885.00							

# Prepaid- FY2017 Tracking Accommodations Only



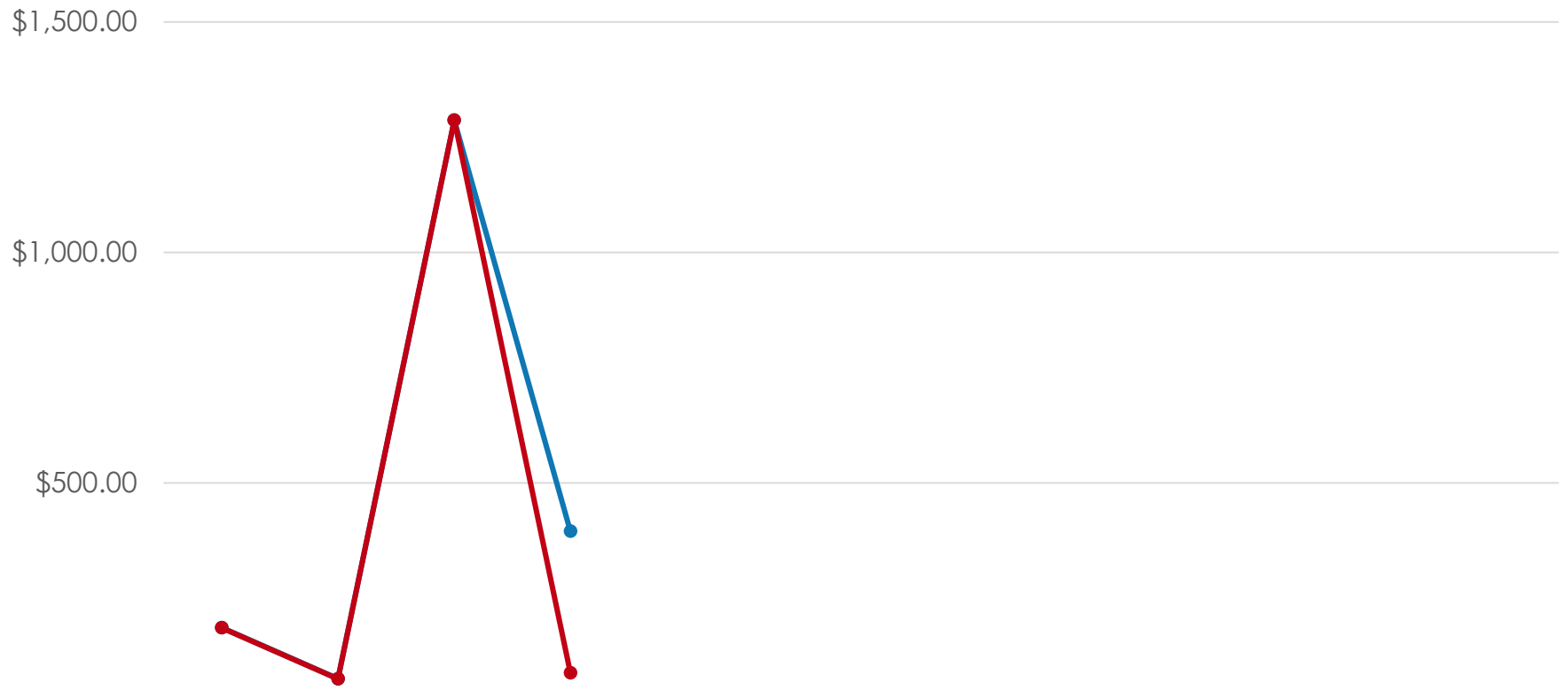
# Prepaid- FY2017 Tracking Accommodations w/ Meal Only



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	\$1,137.21	\$221.87	\$1,394.01	\$906.77	\$1,769.44							
MEDIAN	\$326.00	\$222.00	\$1,201.00	\$808.00	\$1,769.00							

# Prepaid- FY2017 Tracking

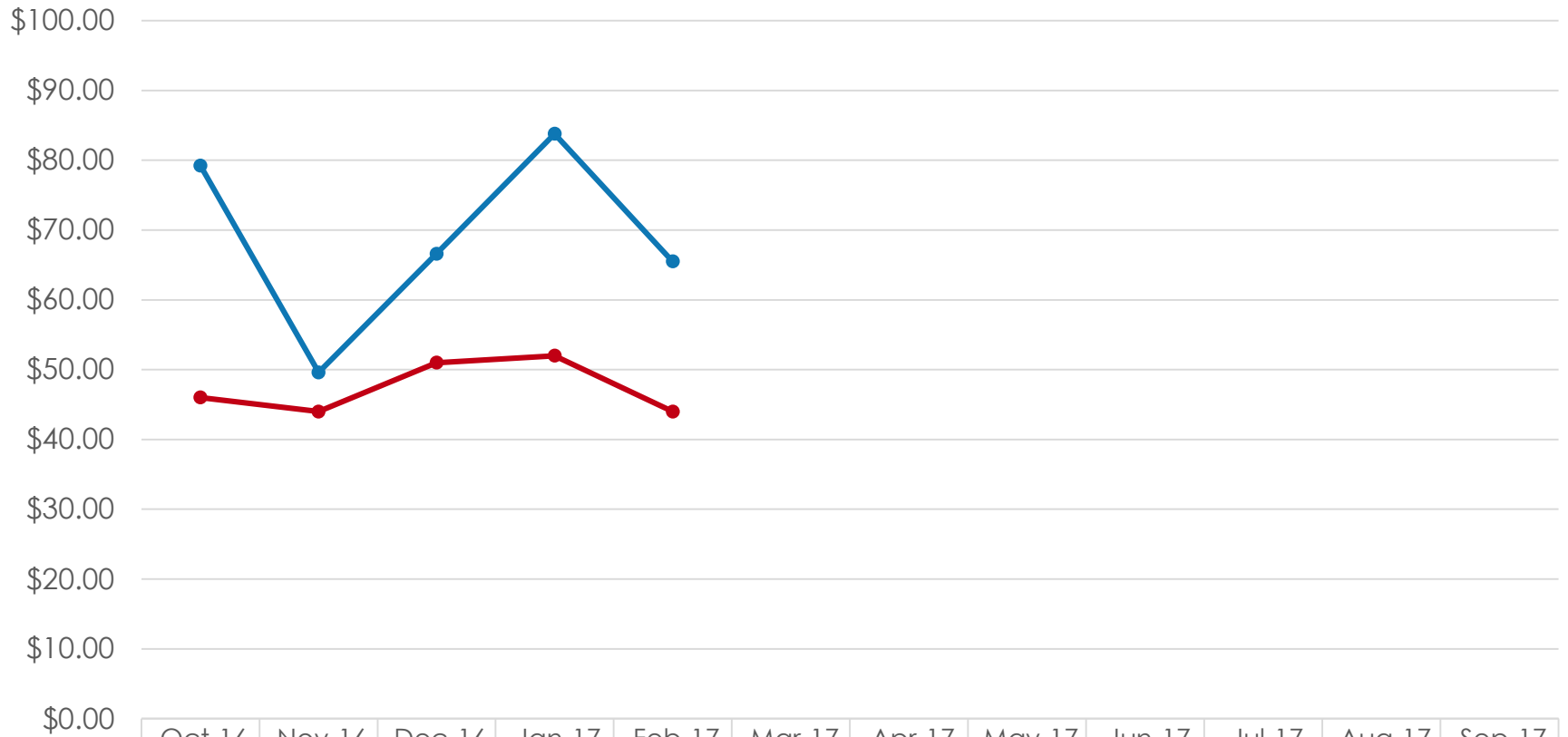
## Food & Beverage in Hotel



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	\$186.43	\$75.43	\$1,286.78	\$395.18								
MEDIAN	\$186.00	\$75.00	\$1,287.00	\$88.00								

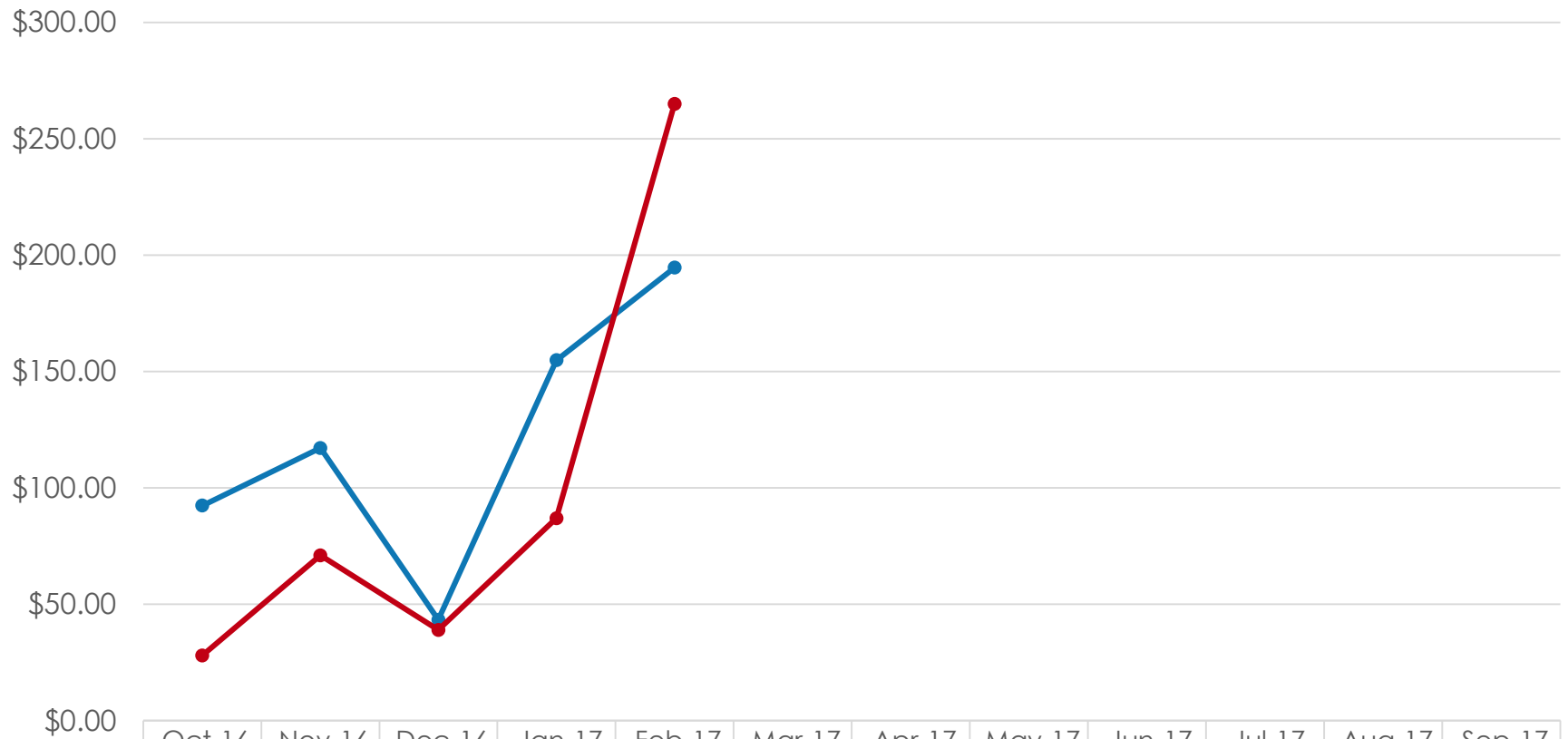
# Prepaid- FY2017 Tracking

## Ground Transportation - Japan



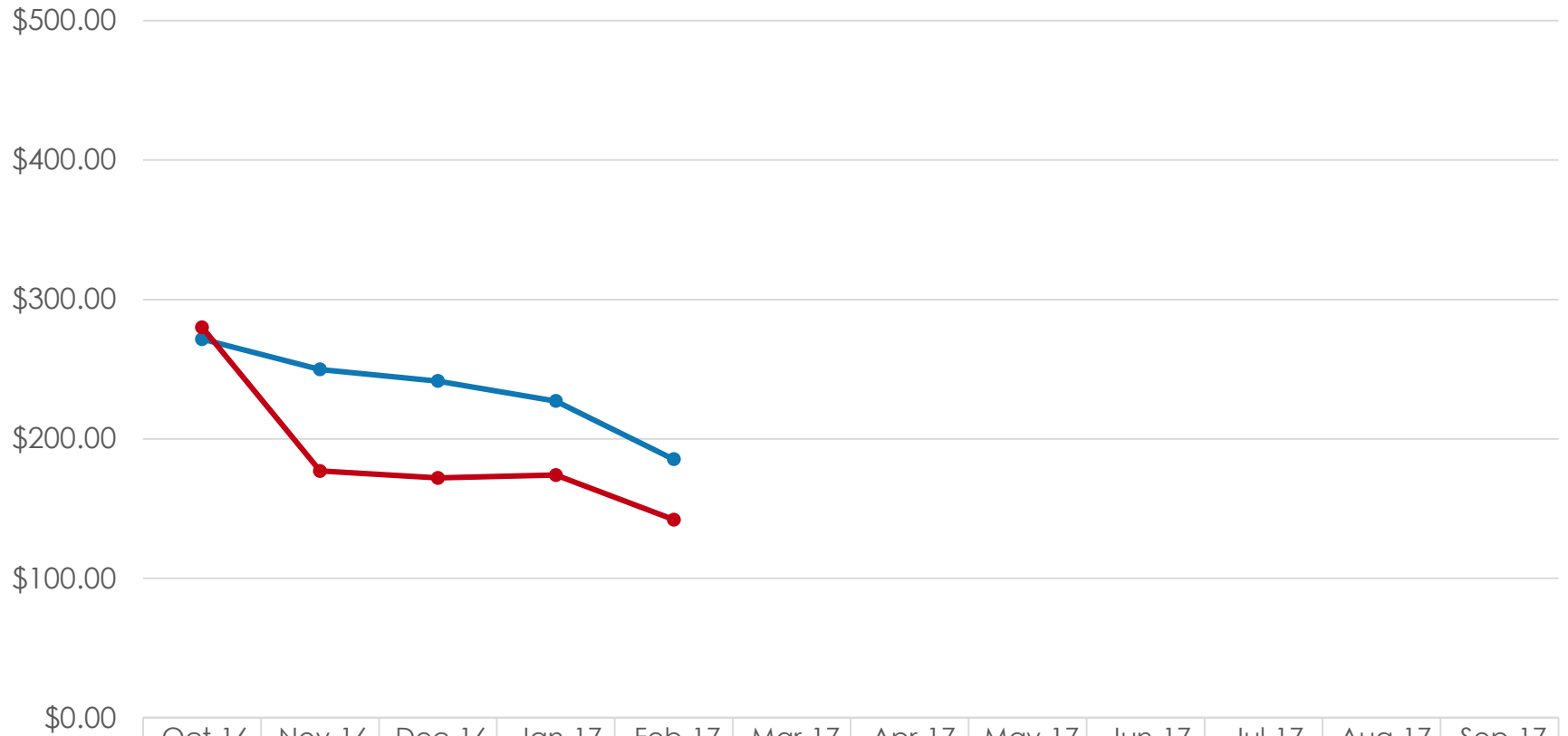
# Prepaid- FY2017 Tracking

## Ground Transportation - Guam



# Prepaid– FY2017 Tracking

## Optional tours/ Activities



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	\$271.44	\$249.81	\$241.44	\$227.10	\$185.40							
MEDIAN	\$280.00	\$177.00	\$172.00	\$174.00	\$142.00							

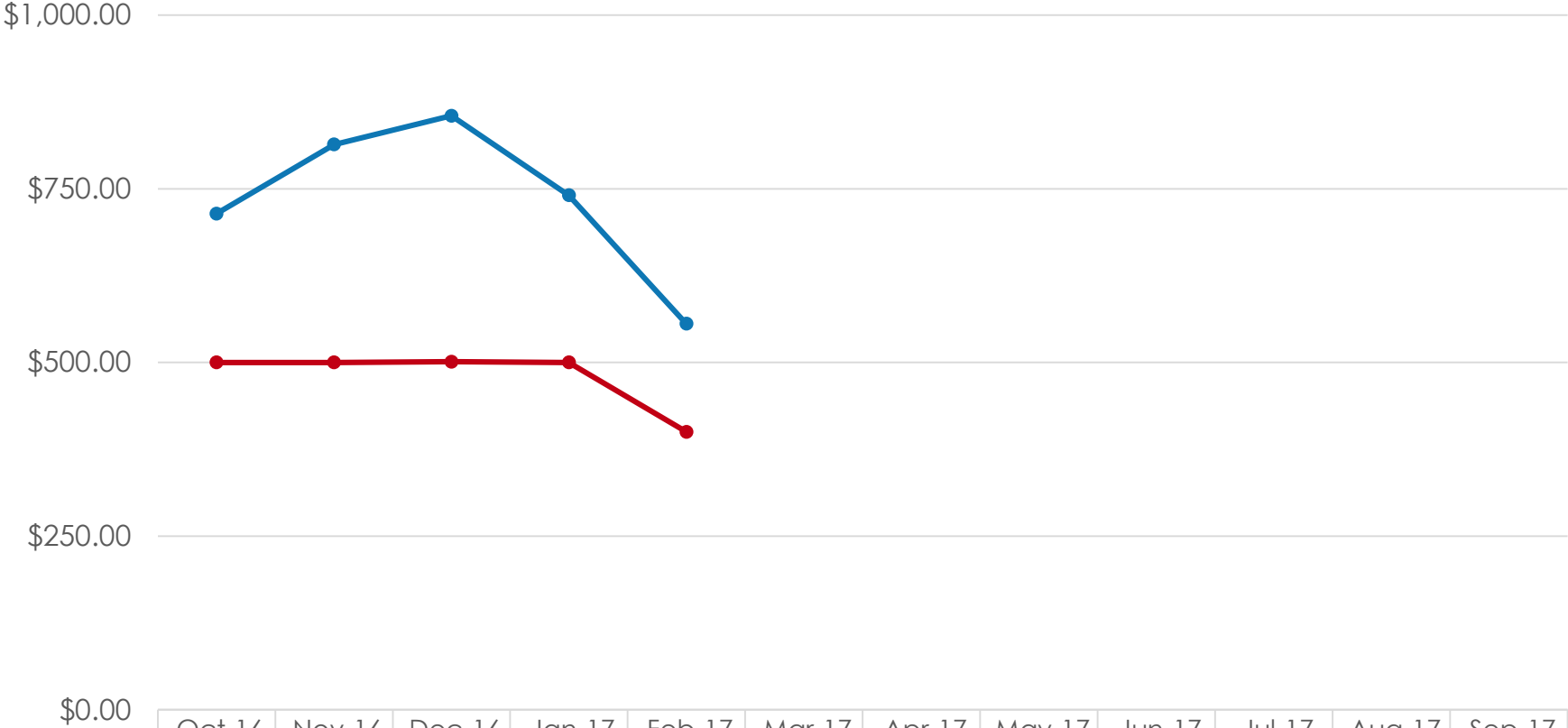
# On-Island Expenditures

- \$555.55 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$407.07 = overall mean average per person prepaid expenditures



# On-Island Entire Travel Party – FY2017

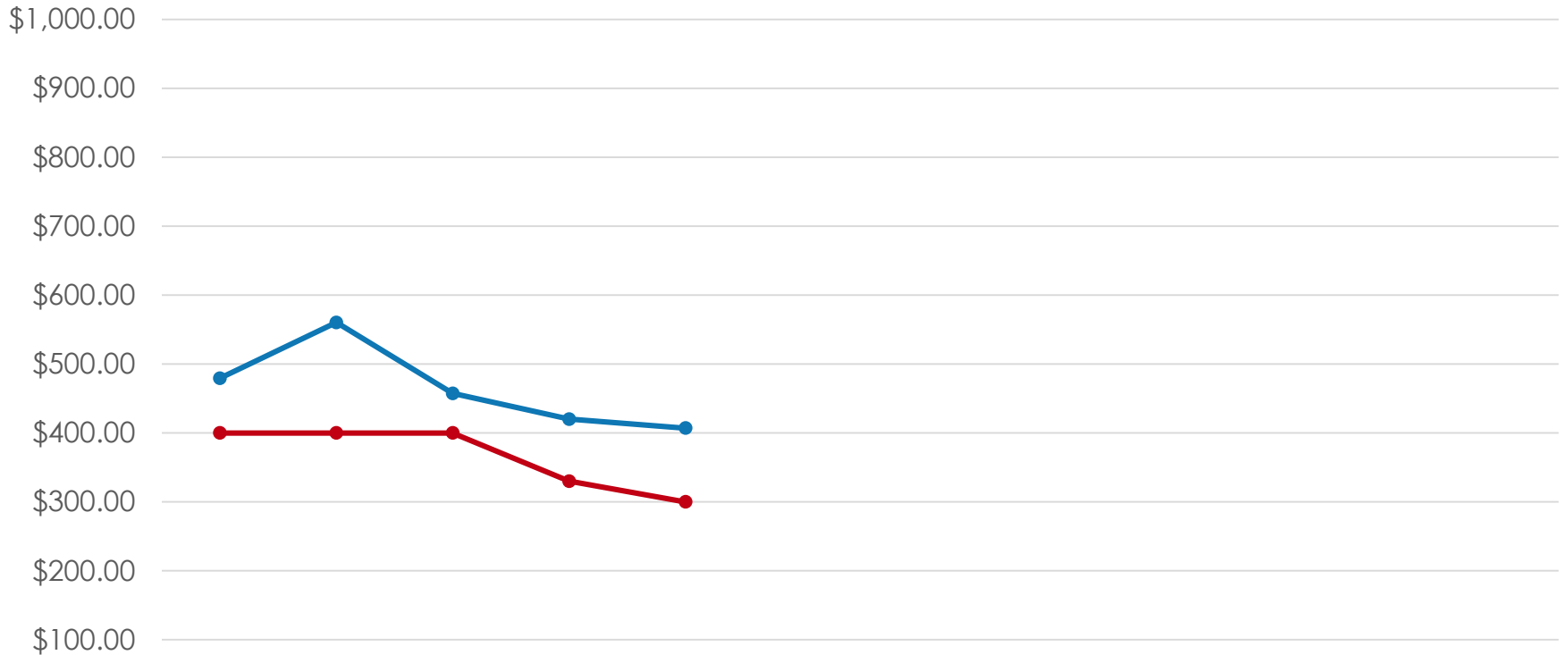
## Tracking



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	\$714.19	\$813.75	\$854.97	\$740.47	\$555.55							
MEDIAN	\$500.00	\$500.00	\$501.00	\$500.00	\$400.00							

# On-Island Per Person – FY2017

## Tracking



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	\$479.47	\$560.29	\$457.40	\$420.06	\$407.07							
MEDIAN	\$400.00	\$400.00	\$400.00	\$330.00	\$300.00							

# On-Island Per Person – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

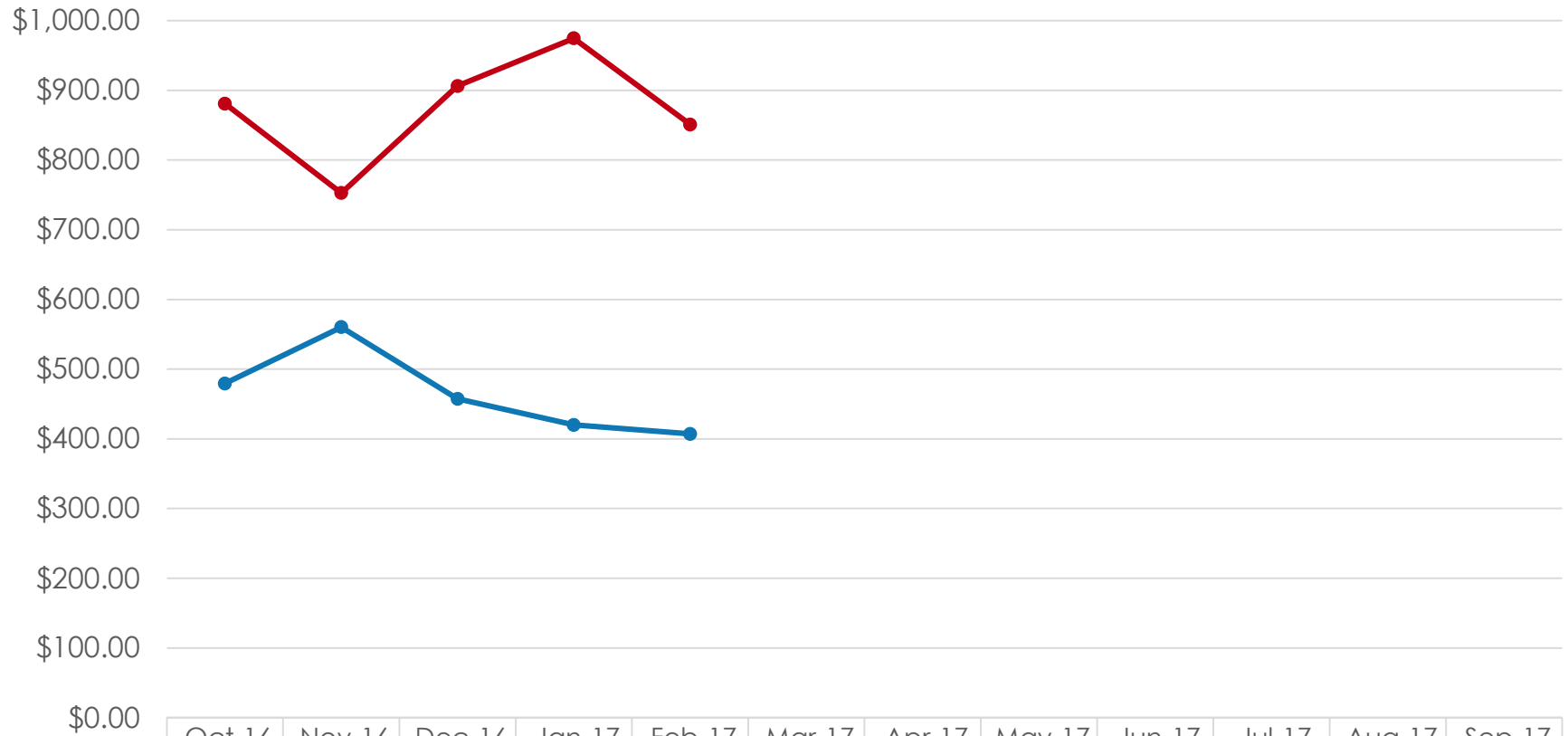
Q11A How much in total did you spend while on Guam during this trip?

### PER PERSON

		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
ONISLE PP	Mean	\$407.07	\$428.24	\$537.20	\$240.25	\$452.08	\$533.22	\$453.22	\$360.38
	Median	\$300	\$360	\$350	\$253	\$450	\$327	\$355	\$297

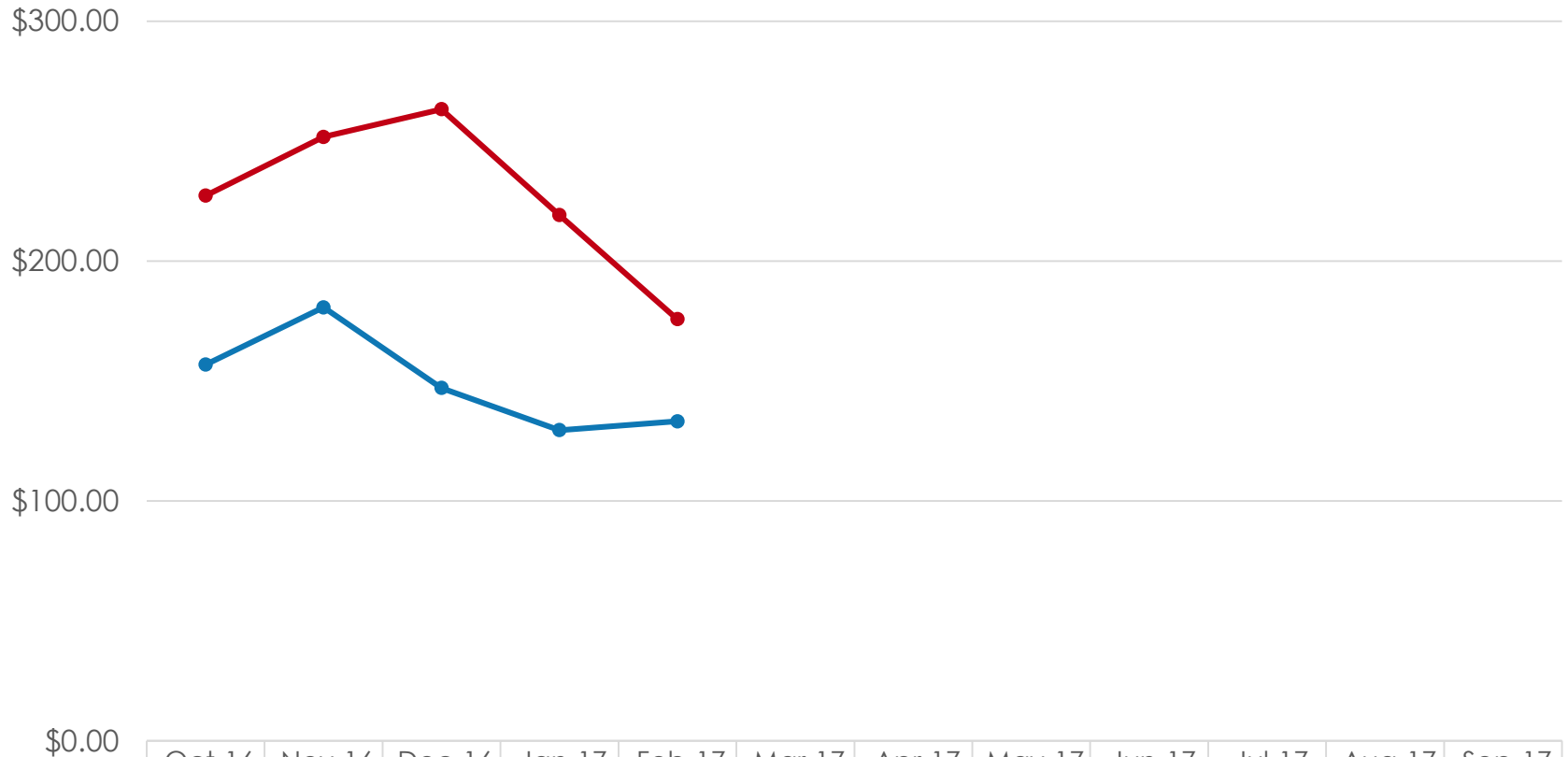
Prepared by QMark Research

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



# On-Island Per Day Spending – FY2017 Tracking

## MEAN

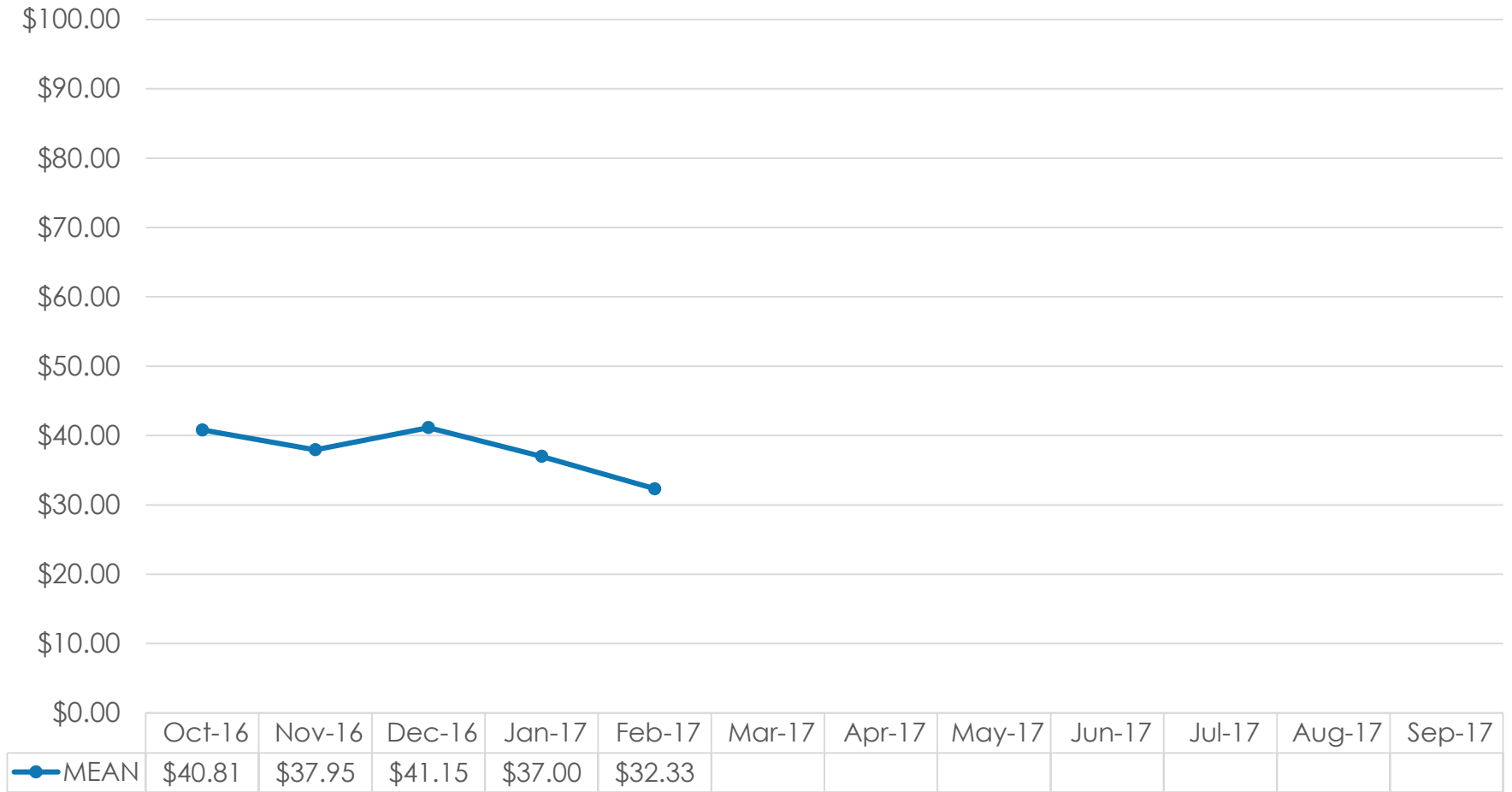


# On-Island Expenses by Category – Mean Entire Travel Party



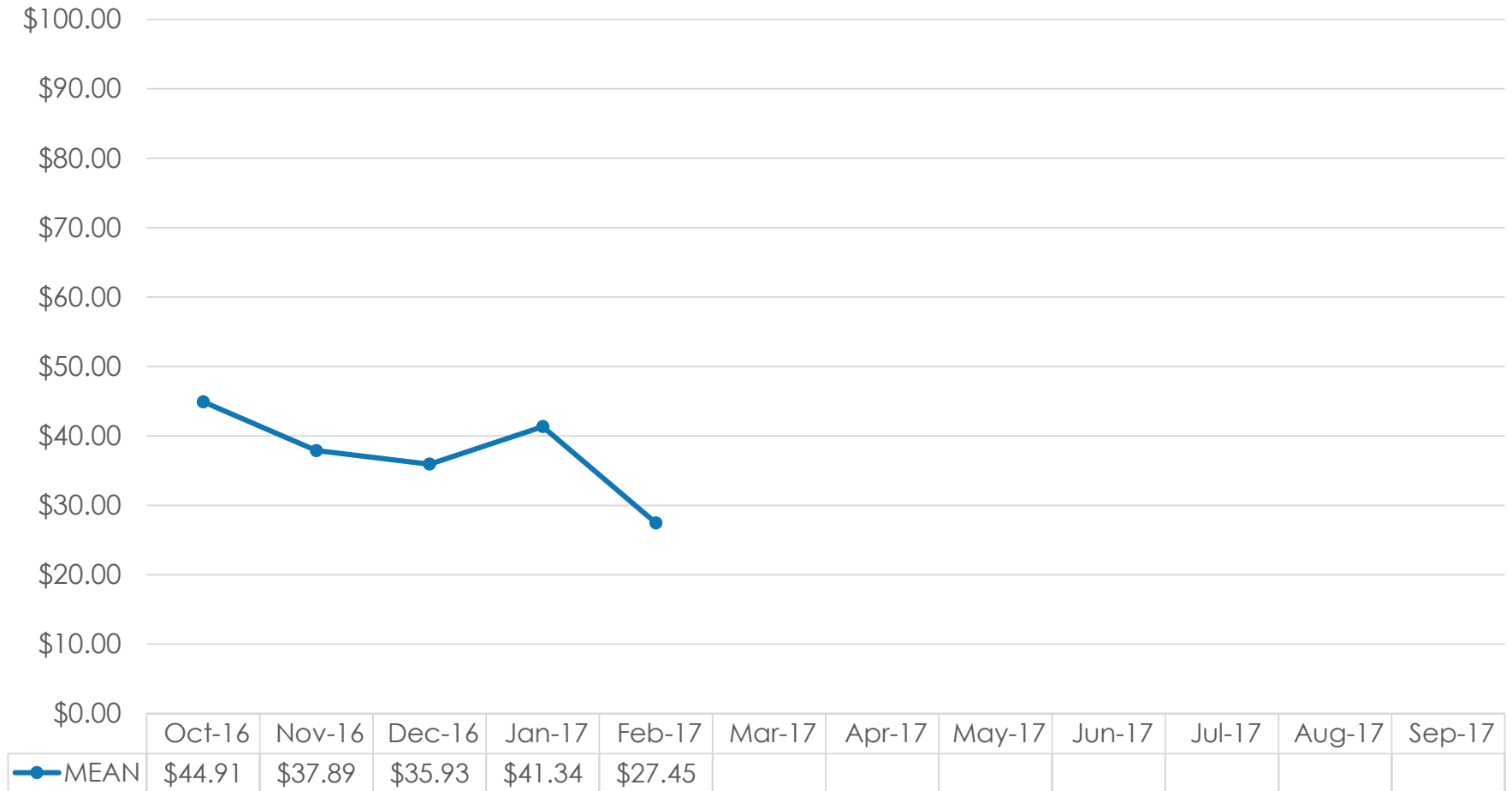
# On-Island – FY2017 Tracking

## Food & Beverage - Hotel



# On-Island – FY2017 Tracking

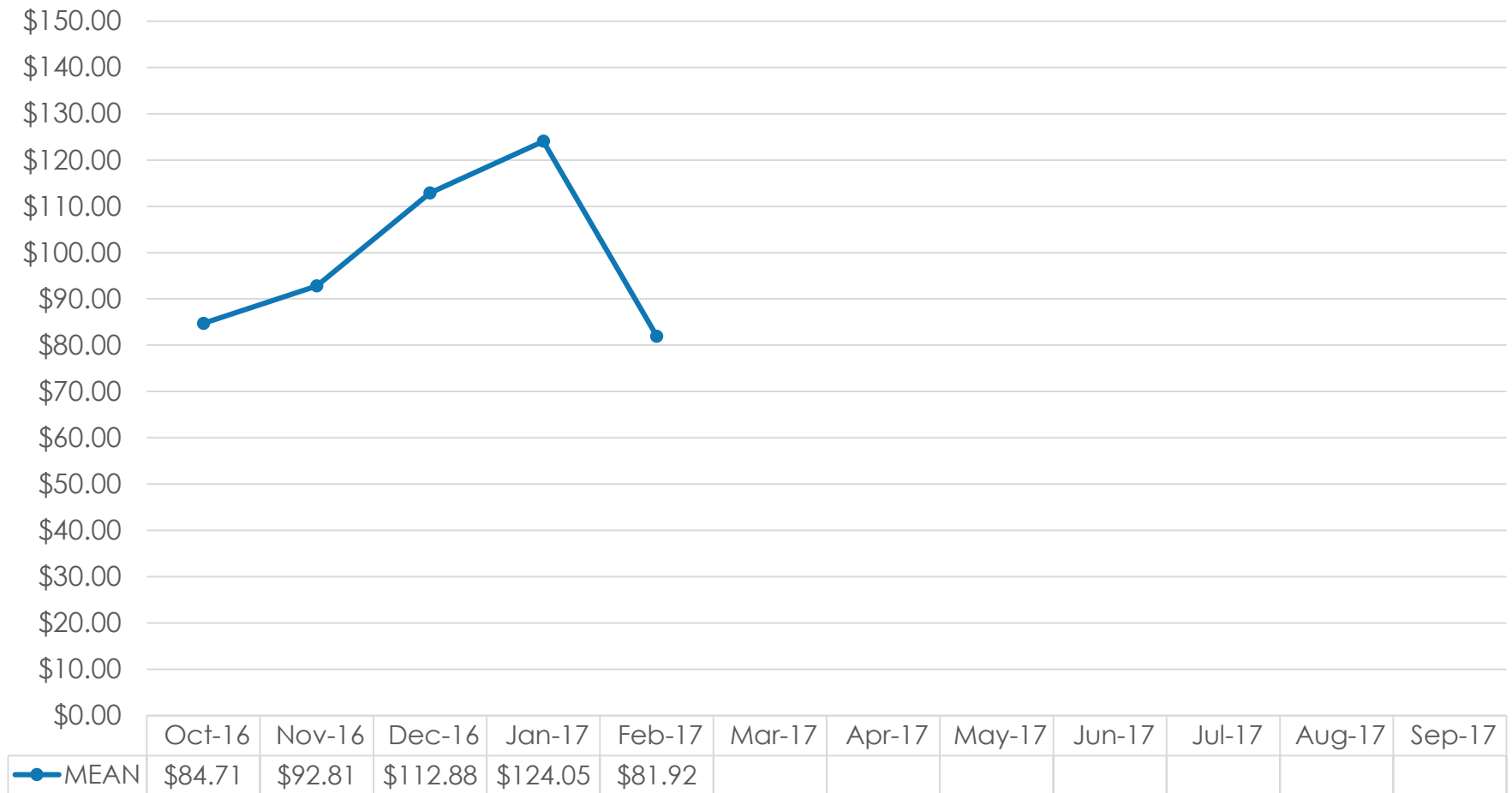
## Food & Beverage – Fast Food/ Convenience Store





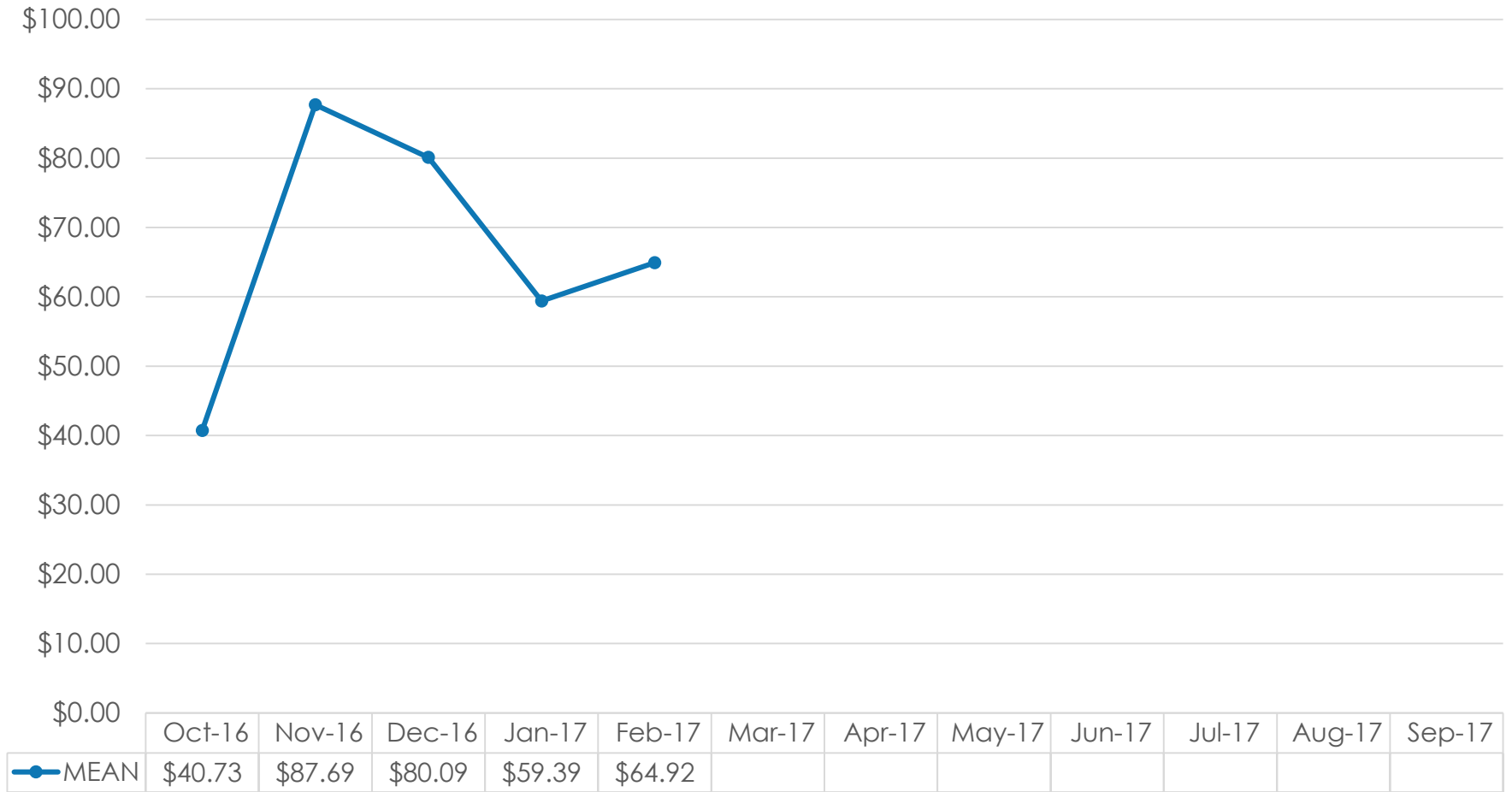
# On-Island – FY2017 Tracking

## Food & Beverage – Restaurant/ Drinking Est Outside Hotel



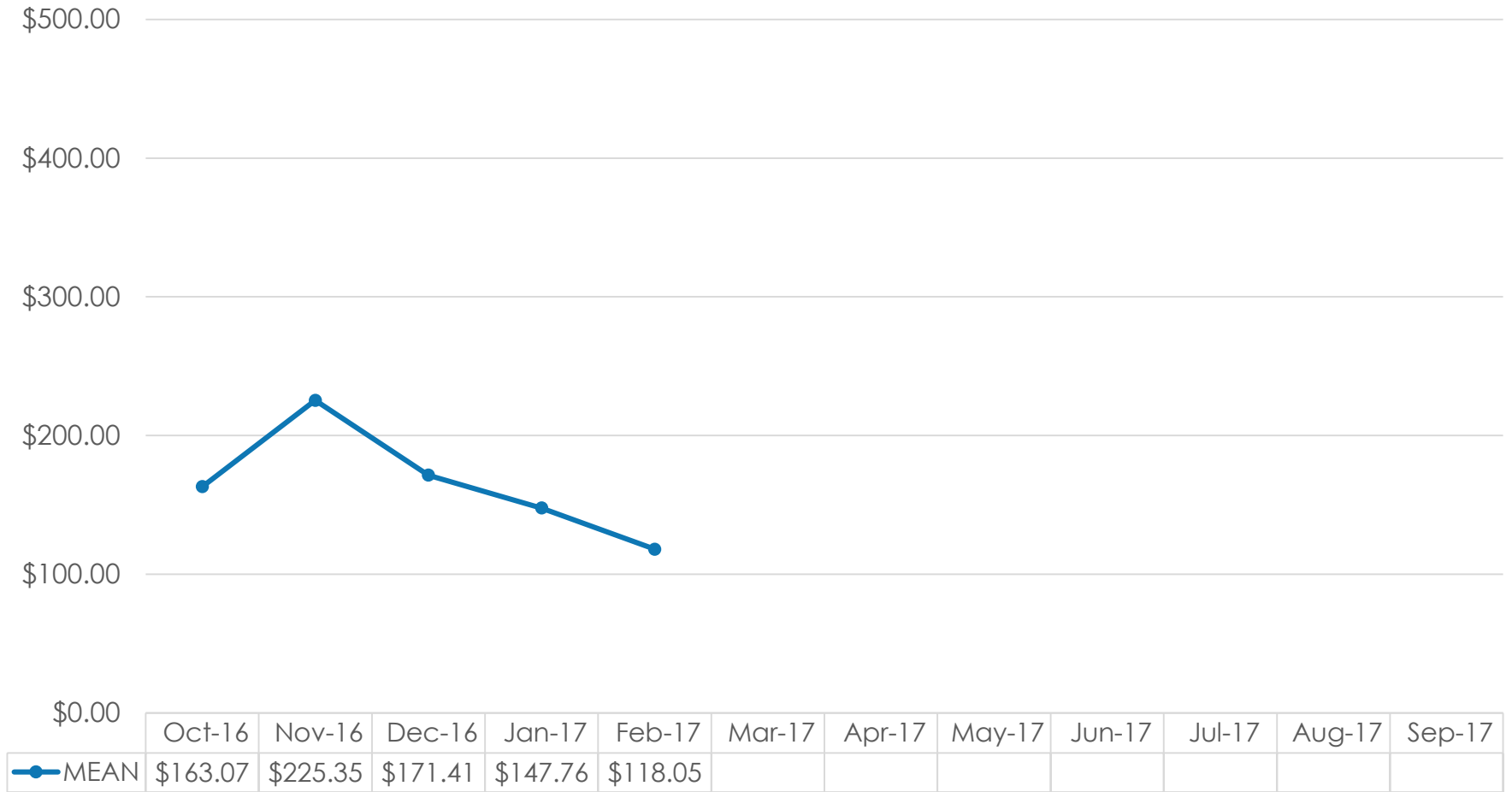
# On-Island – FY2017 Tracking

## Optional tour/ Activities



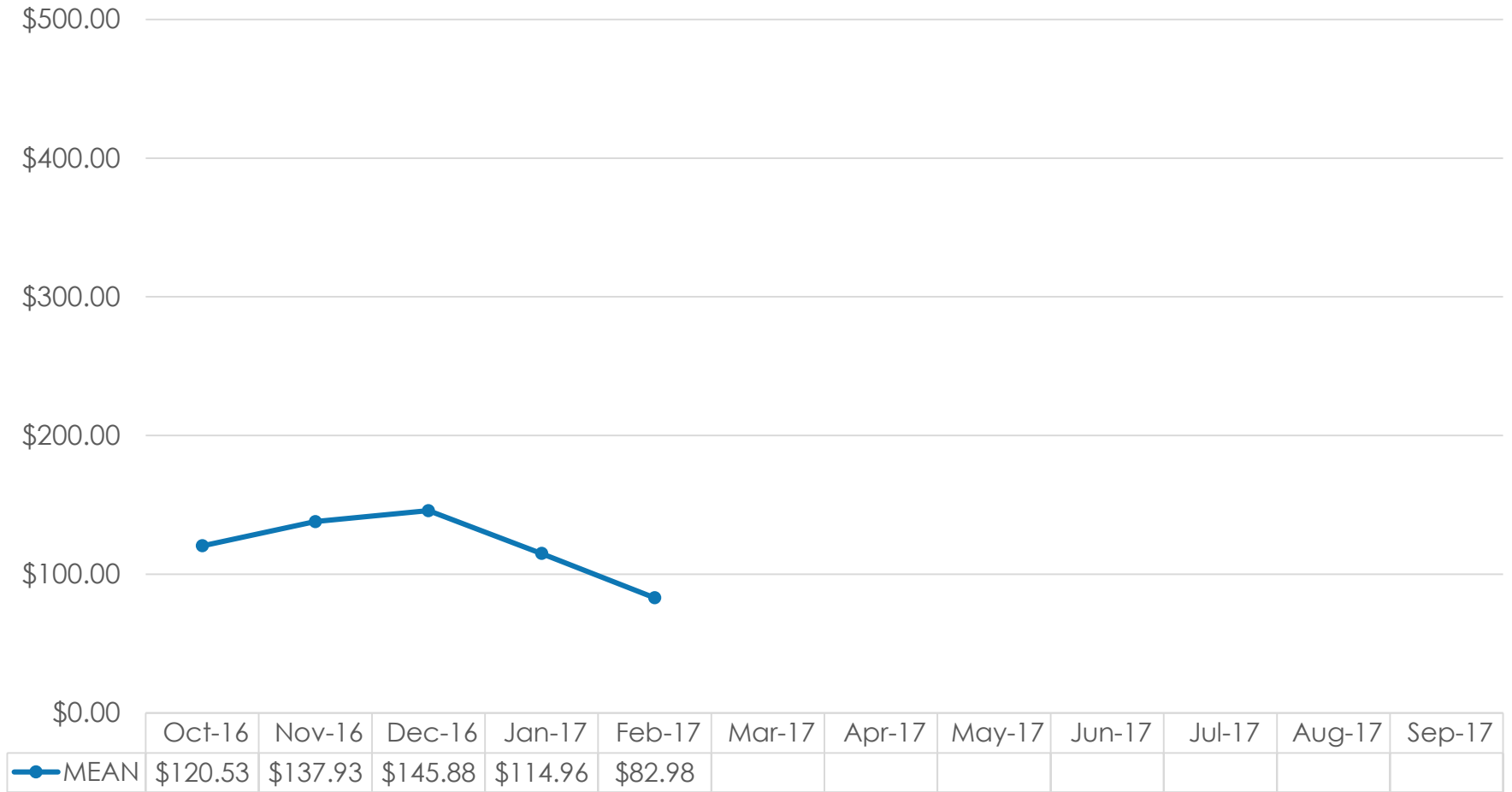
# On-Island – FY2017 Tracking

## Gift/ Souvenir – Self/ Companion



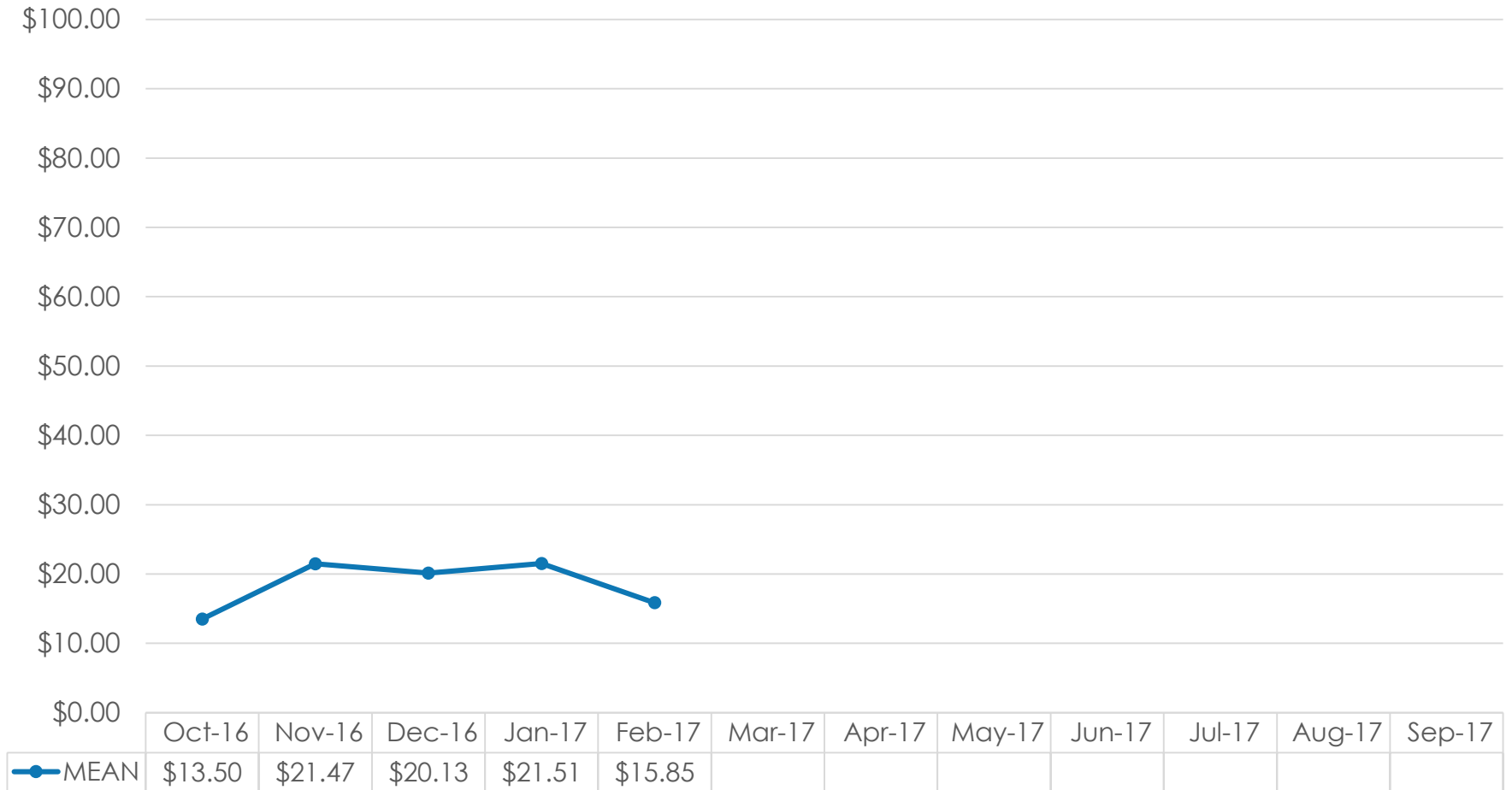
# On-Island – FY2017 Tracking

## Gift/ Souvenir – Friends/ Family



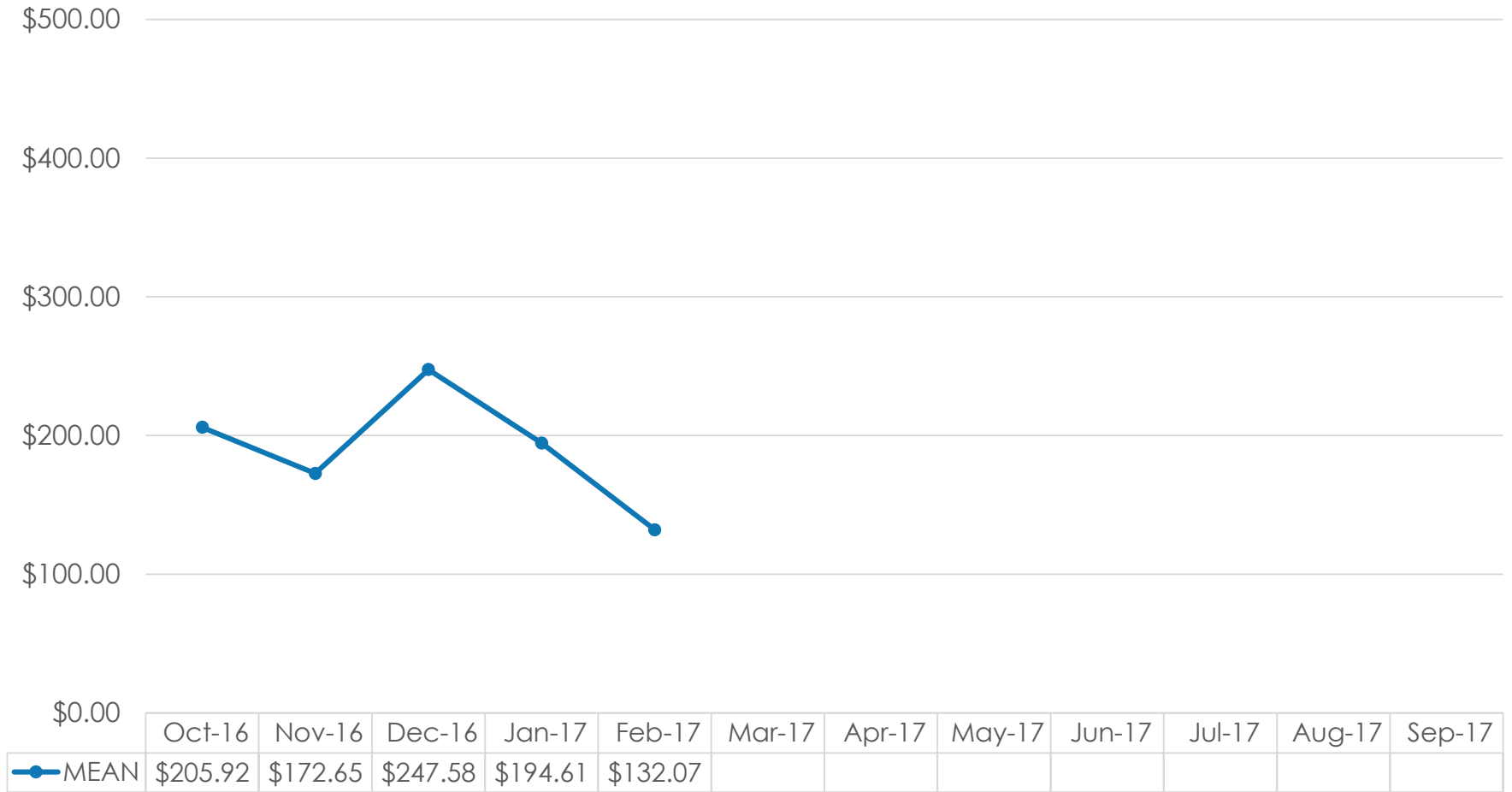
# On-Island – FY2017 Tracking

## Local Transportation



# On-Island – FY2017 Tracking

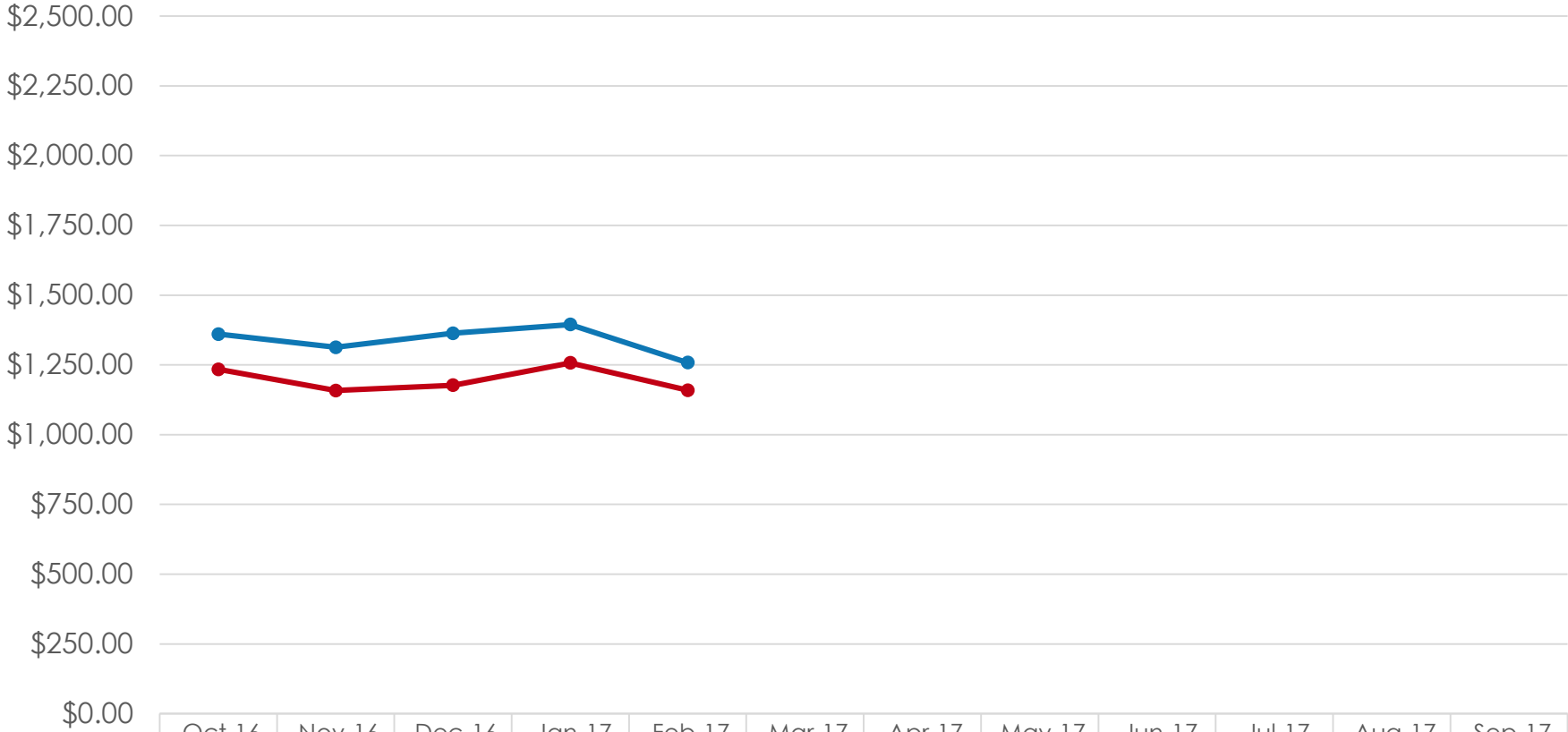
## Other Not Included



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

- \$1,257.93 = overall mean average prepaid & on-isle expense by respondent

# TOTAL Per Person Expenditures – FY2017 Tracking



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	\$1,360.31	\$1,312.92	\$1,363.21	\$1,394.62	\$1,257.93							
MEDIAN	\$1,234.00	\$1,158.00	\$1,177.00	\$1,257.00	\$1,159.00							



# TOTAL Per Person Expenditures – Key Segments

**GUAM VISITORS BUREAU - EXIT SURVEY**

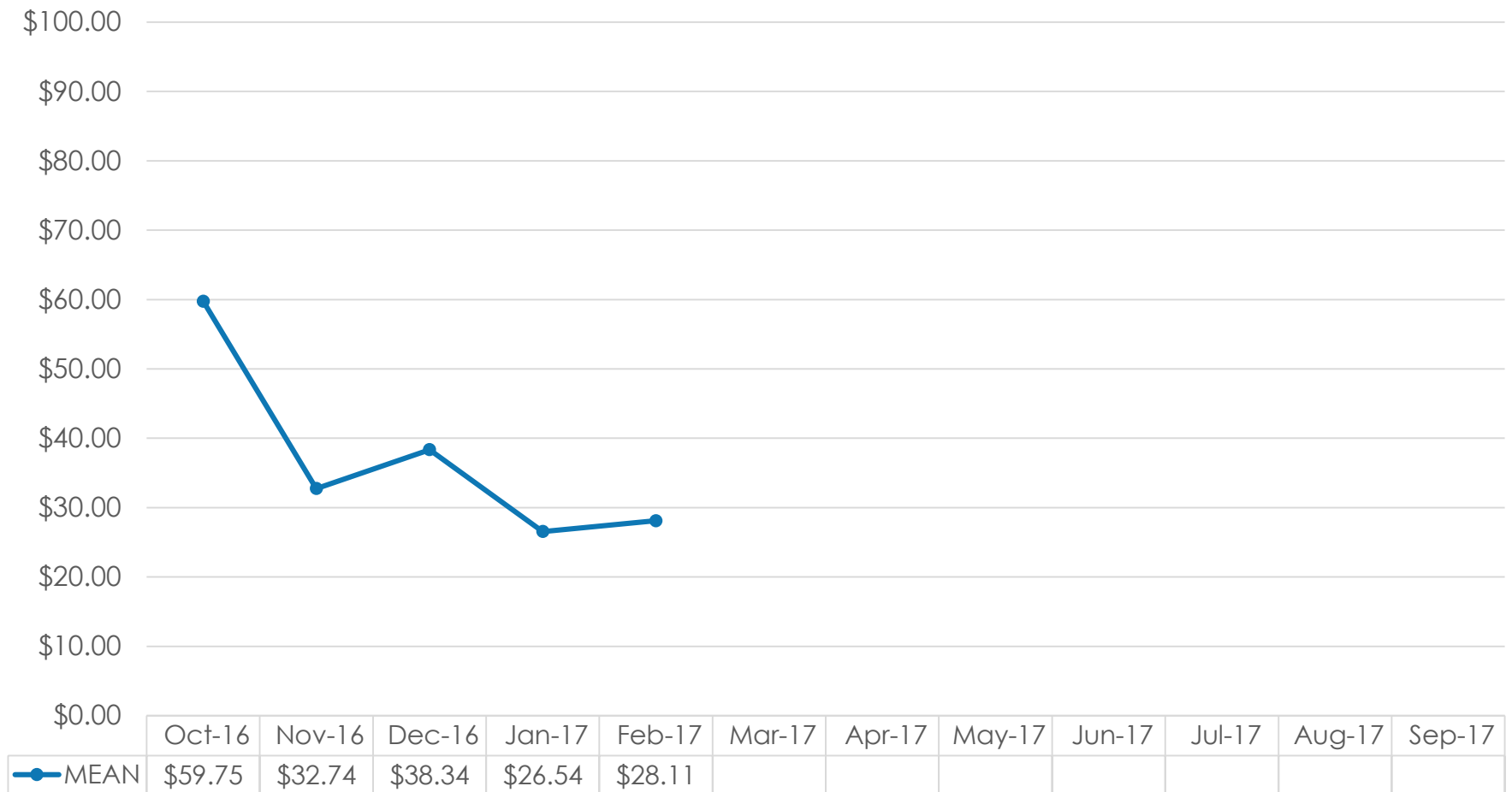
**TOTAL EXPENDITURES (On-Isle / Prepaid)**

**PER PERSON**

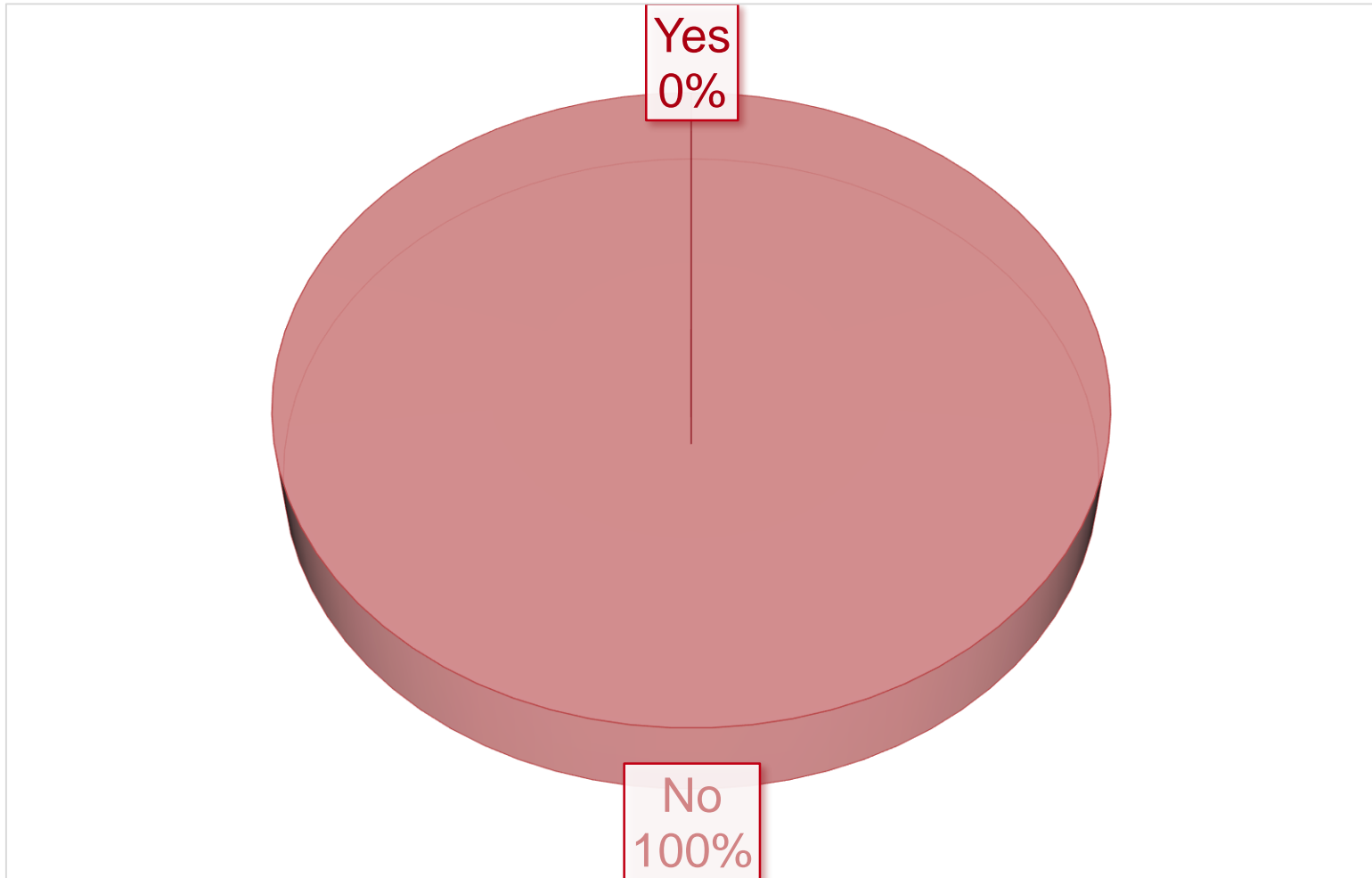
		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
TOTAL PP	Mean	\$1,257.93	\$1,514.67	\$1,396.66	\$1,006.64	\$1,642.70	\$1,686.03	\$1,247.64	\$864.36
	Median	\$1,159	\$1,394	\$1,278	\$958	\$1,532	\$1,801	\$1,093	\$650

Prepared by QMark Research

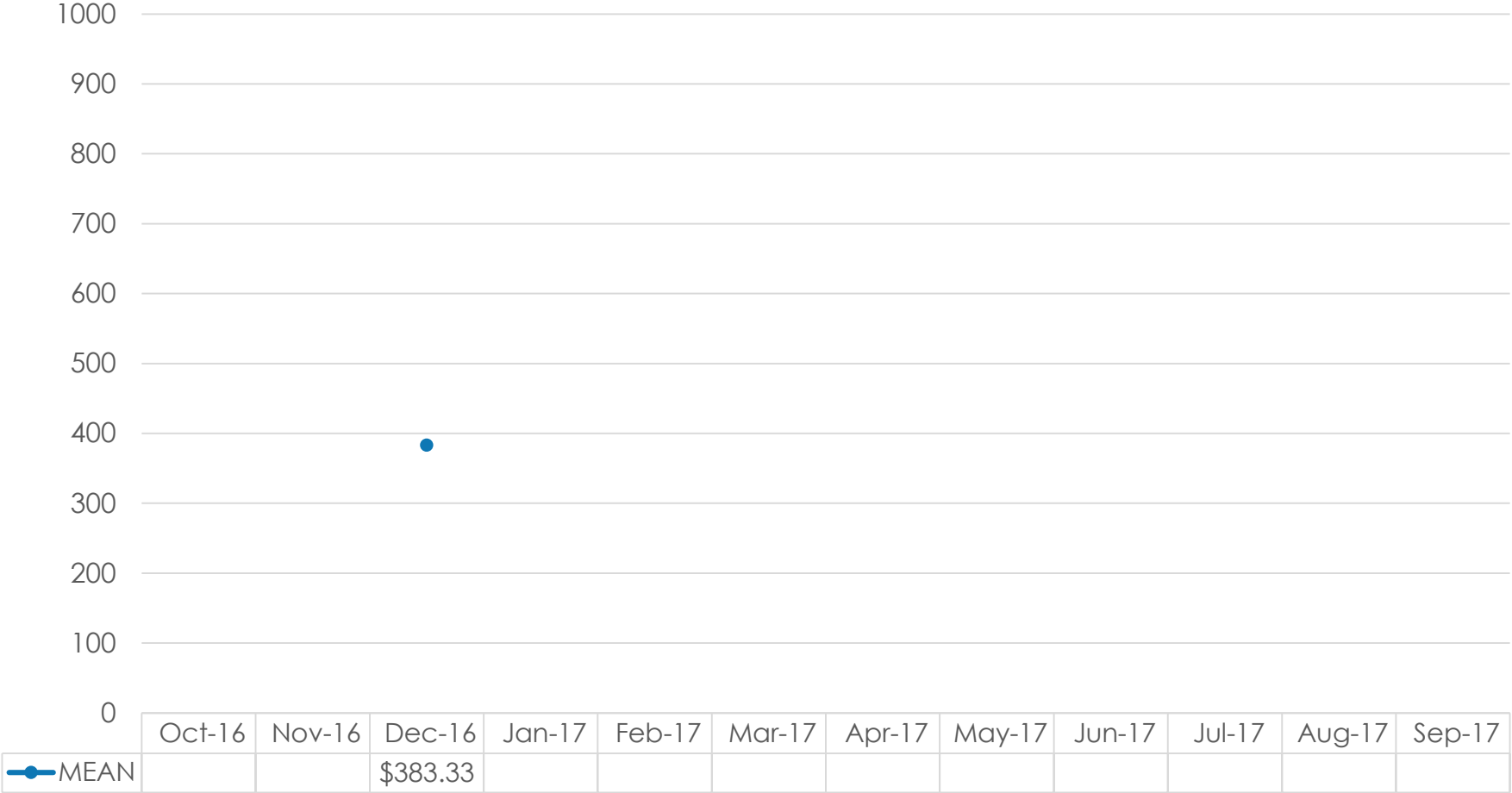
# GUAM AIRPORT EXPENDITURE – FY2017 Tracking



# PARTICIPATED IN SHOP GUAM e-FESTIVAL



# SHOP GUAM E-FESTIVAL SPENDING – FY2017 Tracking

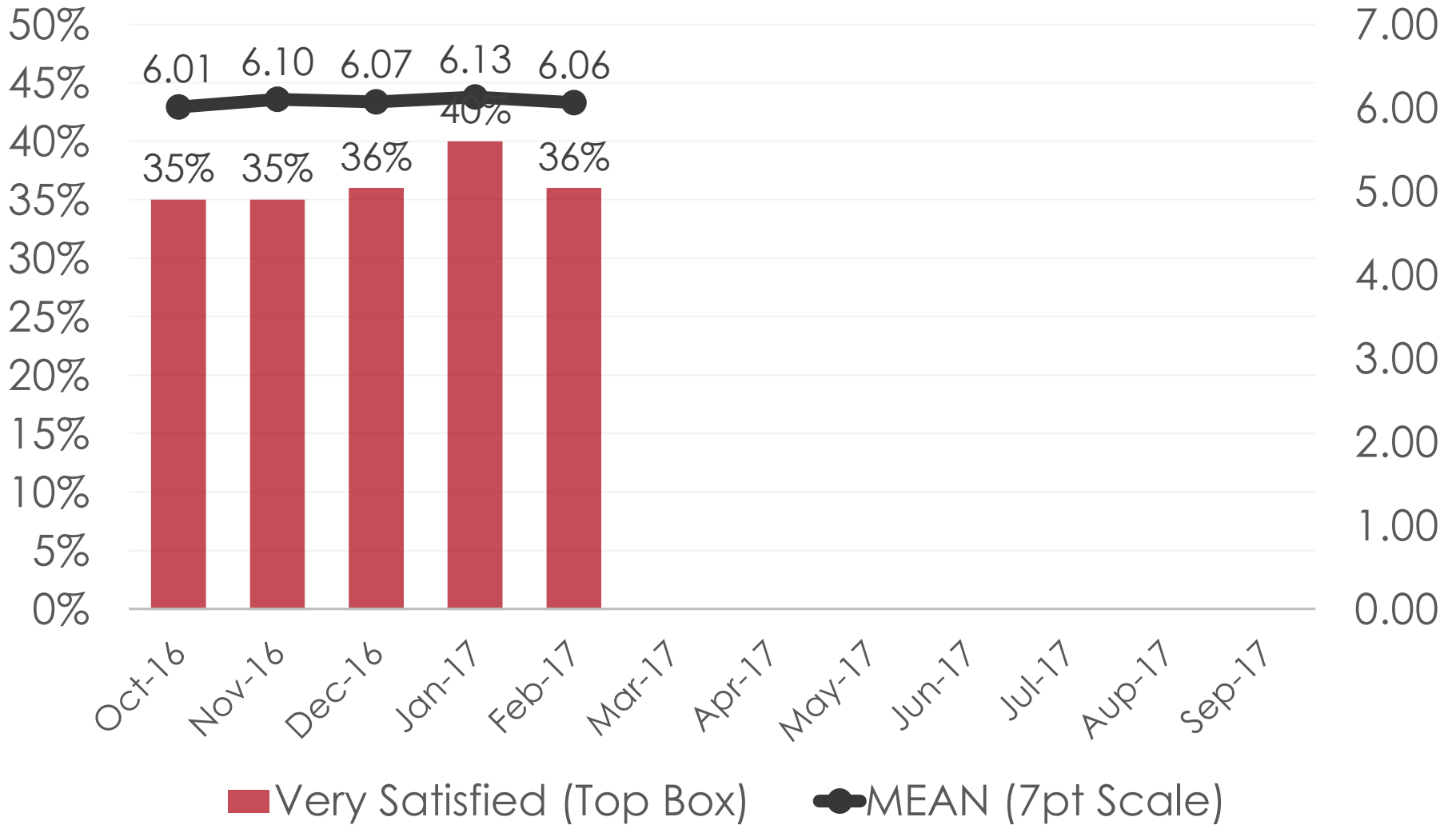


# SECTION 4

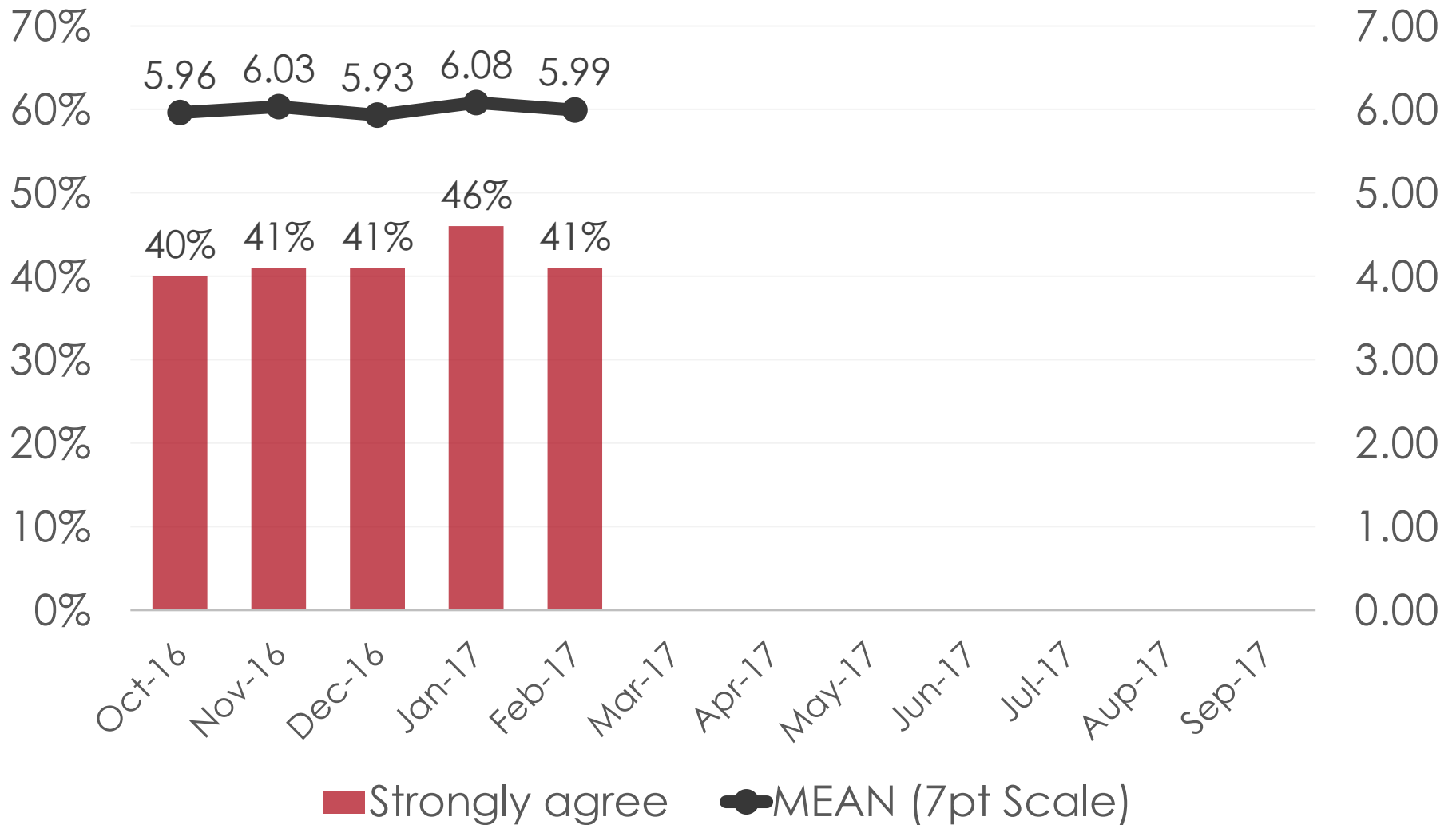
# VISITOR SATISFACTION

# BEHAVIOR

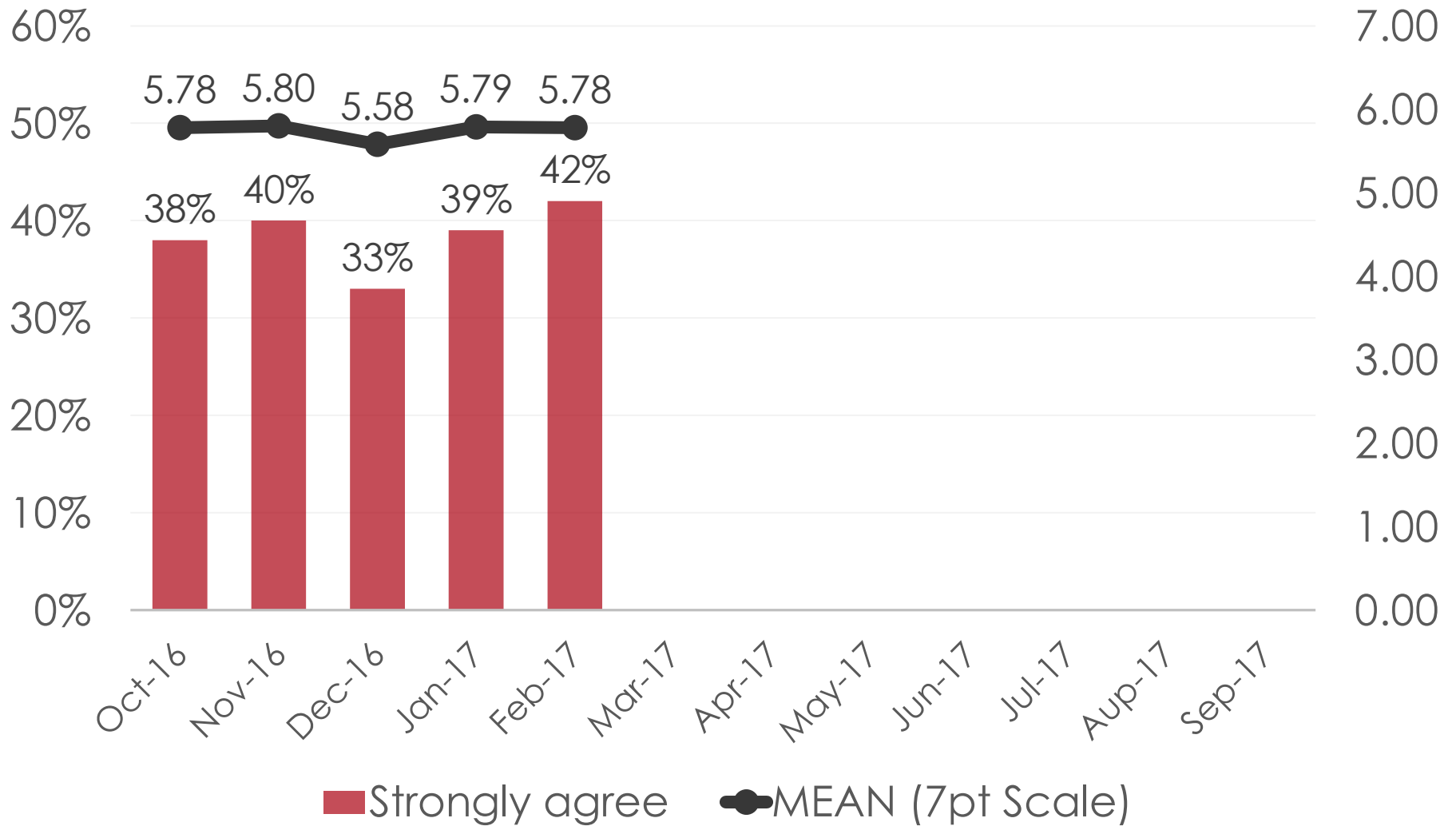
# OVERALL SATISFACTION



# Guam was better than expected

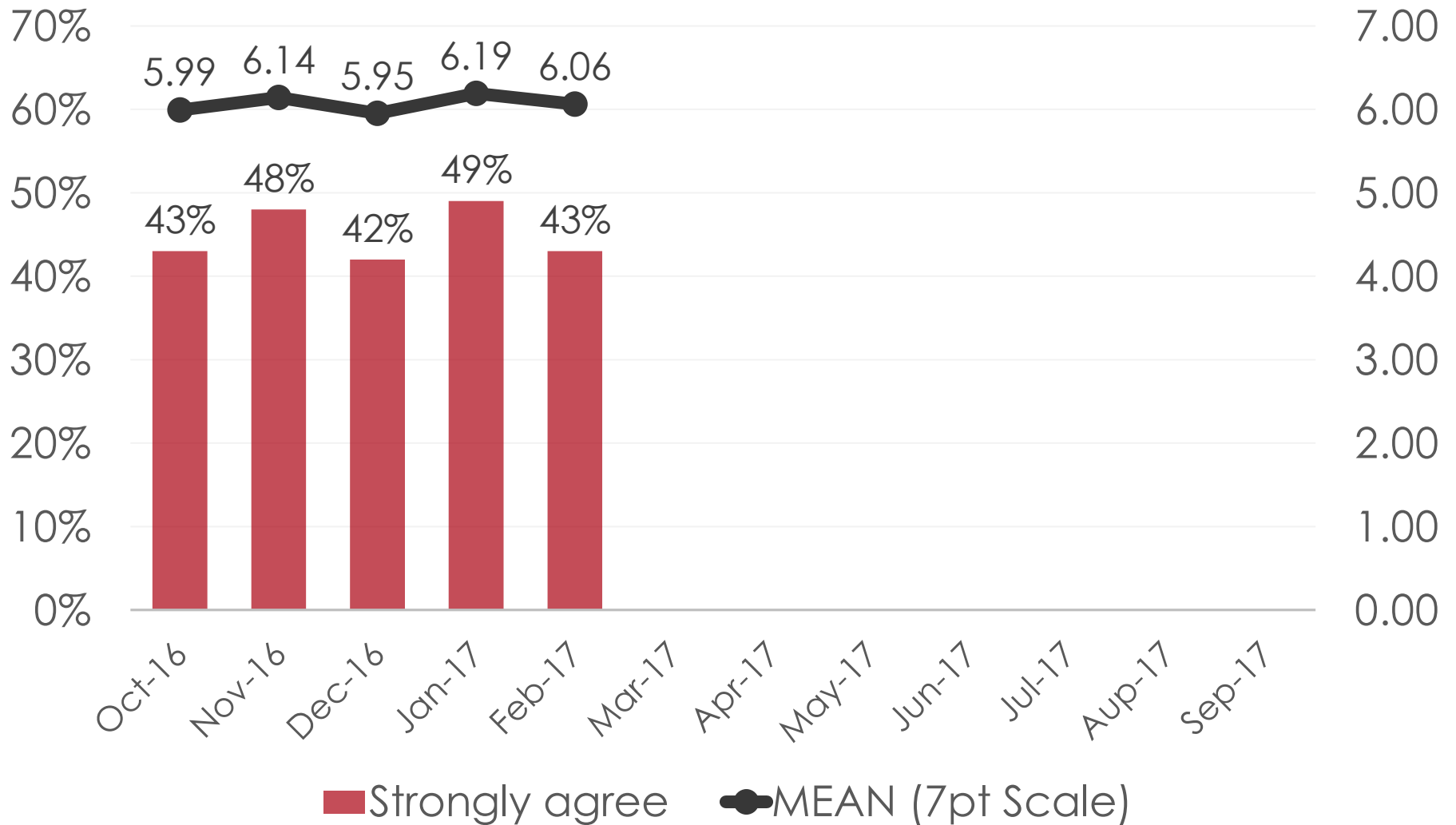


# I had no communication problems

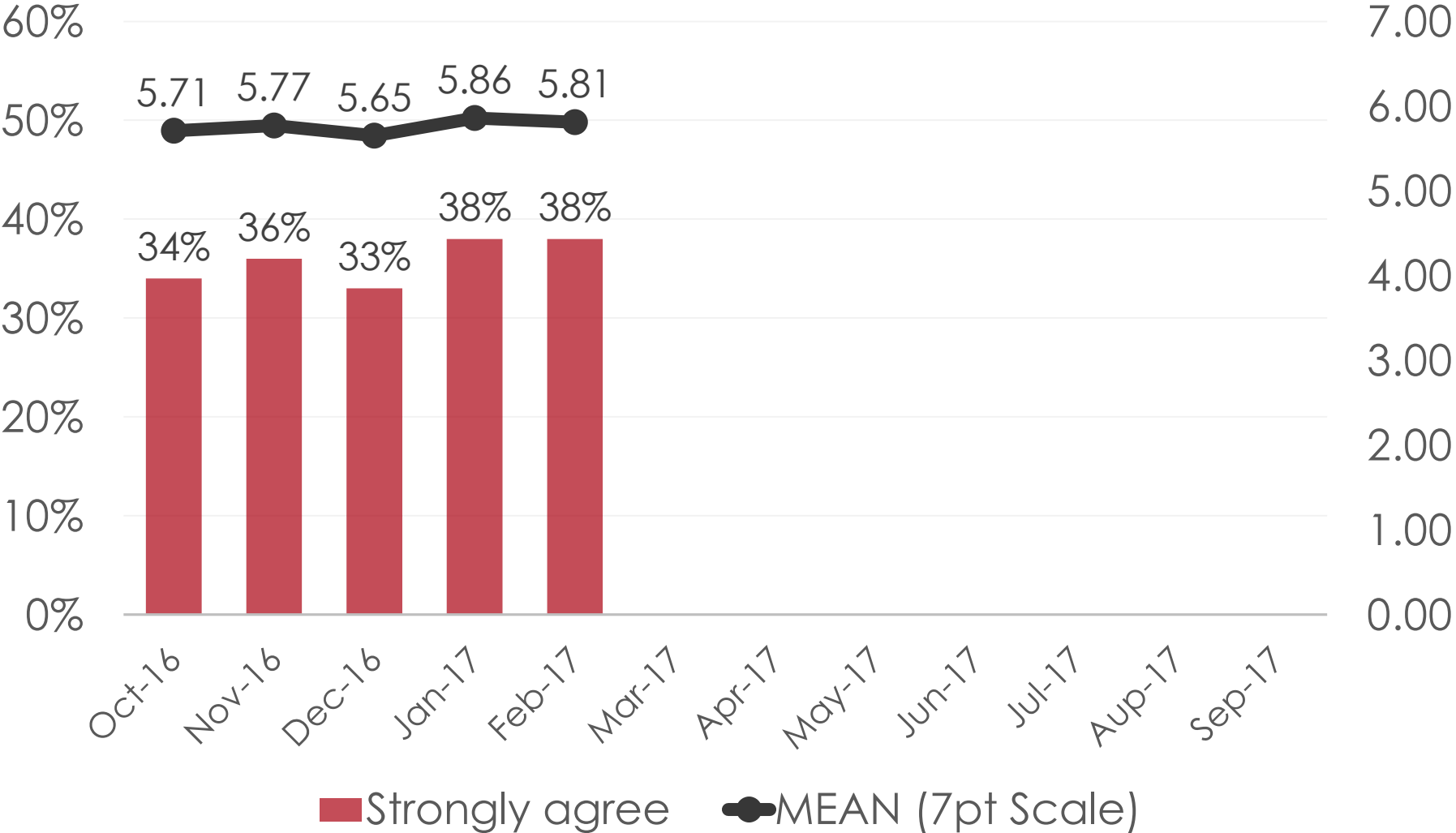




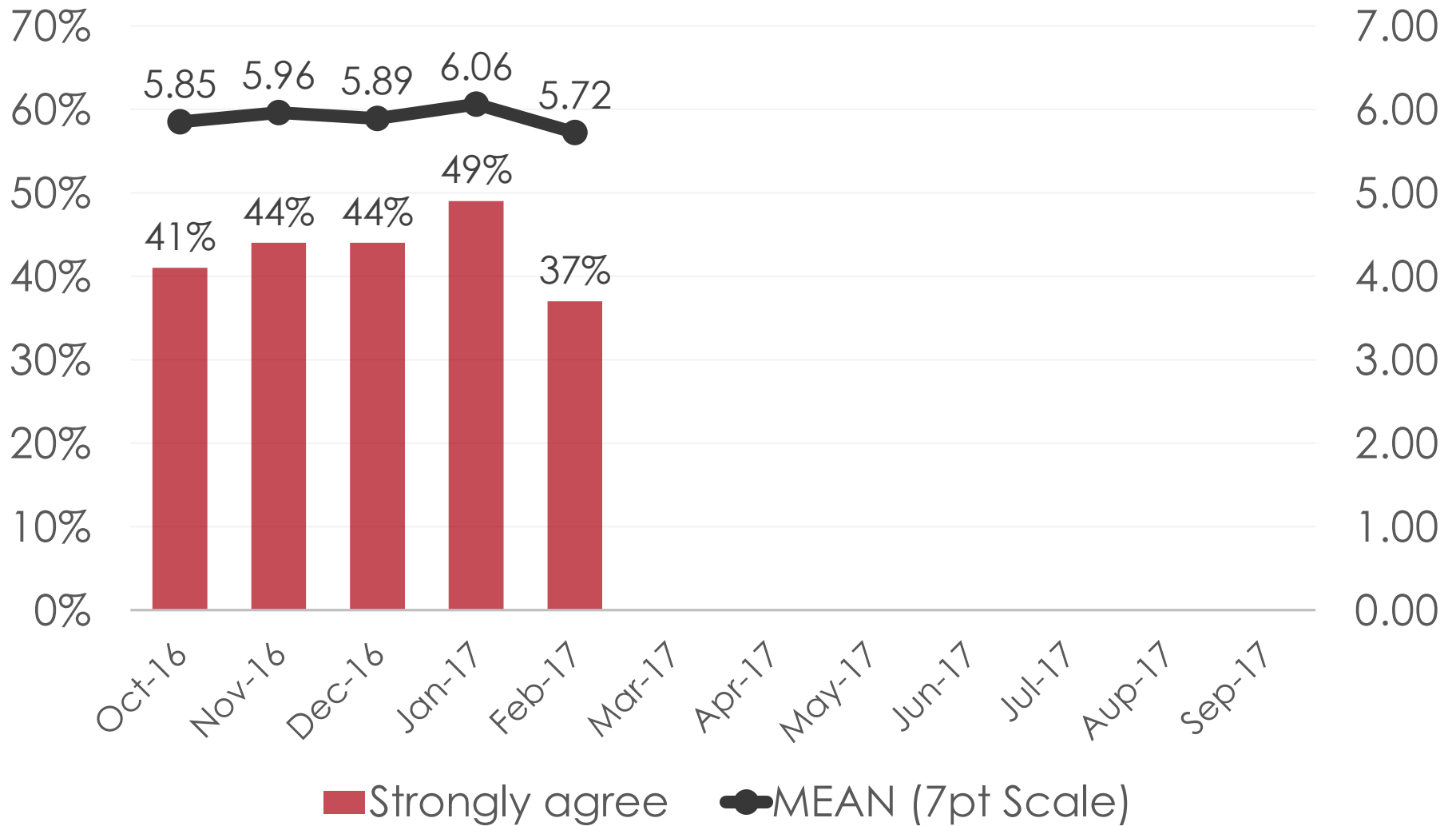
# I will recommend Guam to friends



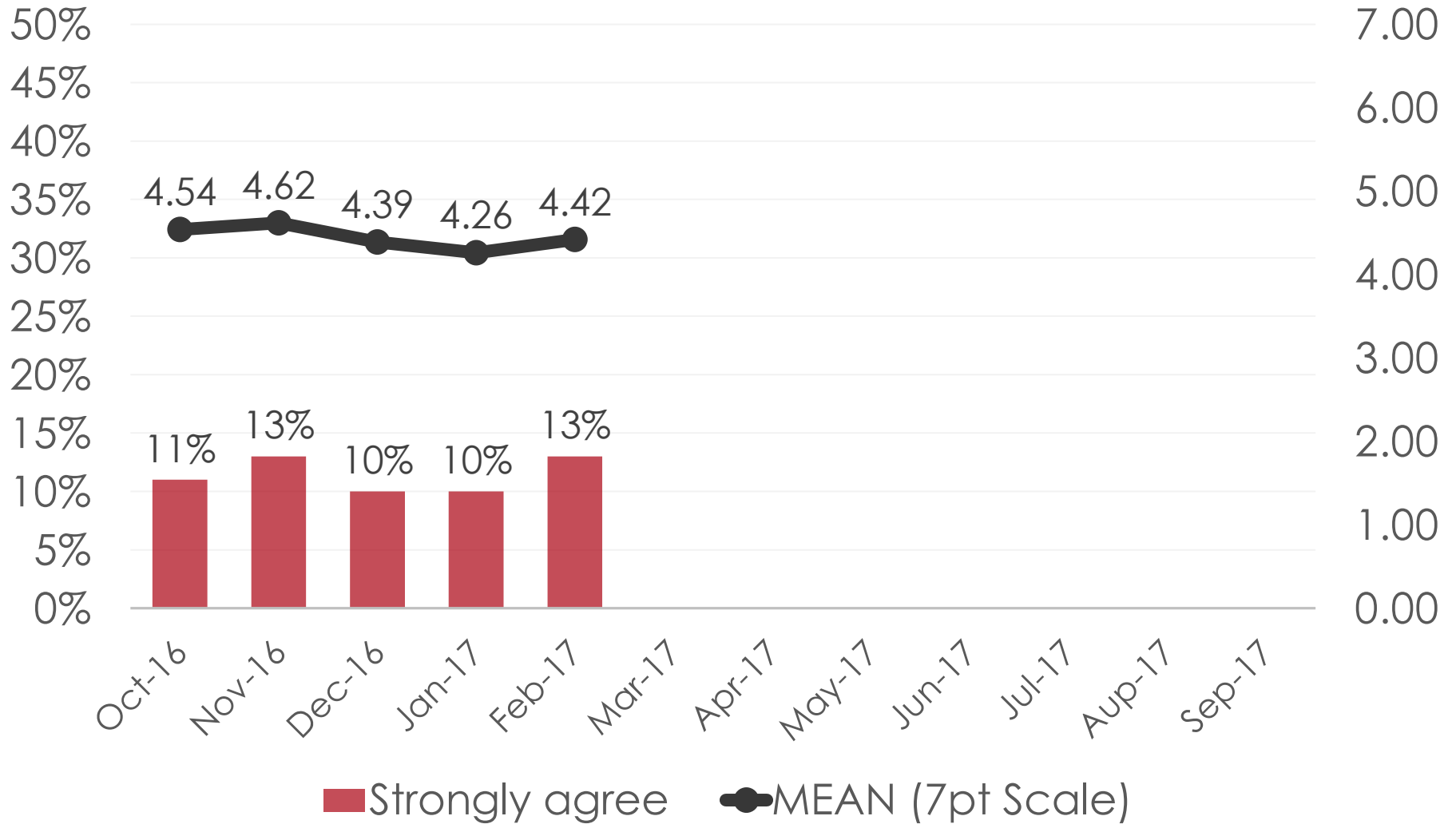
# Sites on Guam were attractive



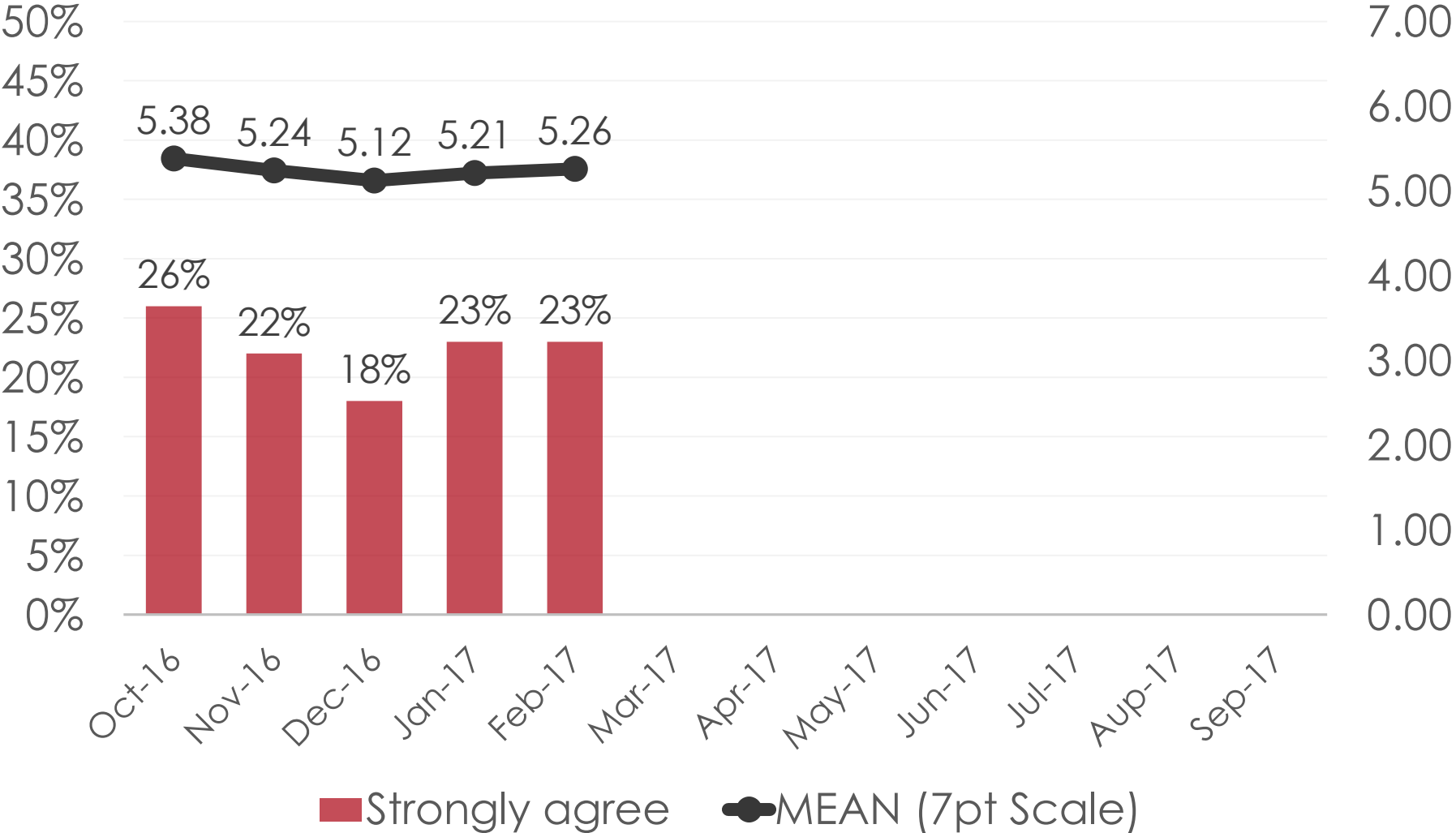
# I plan to visit Guam again



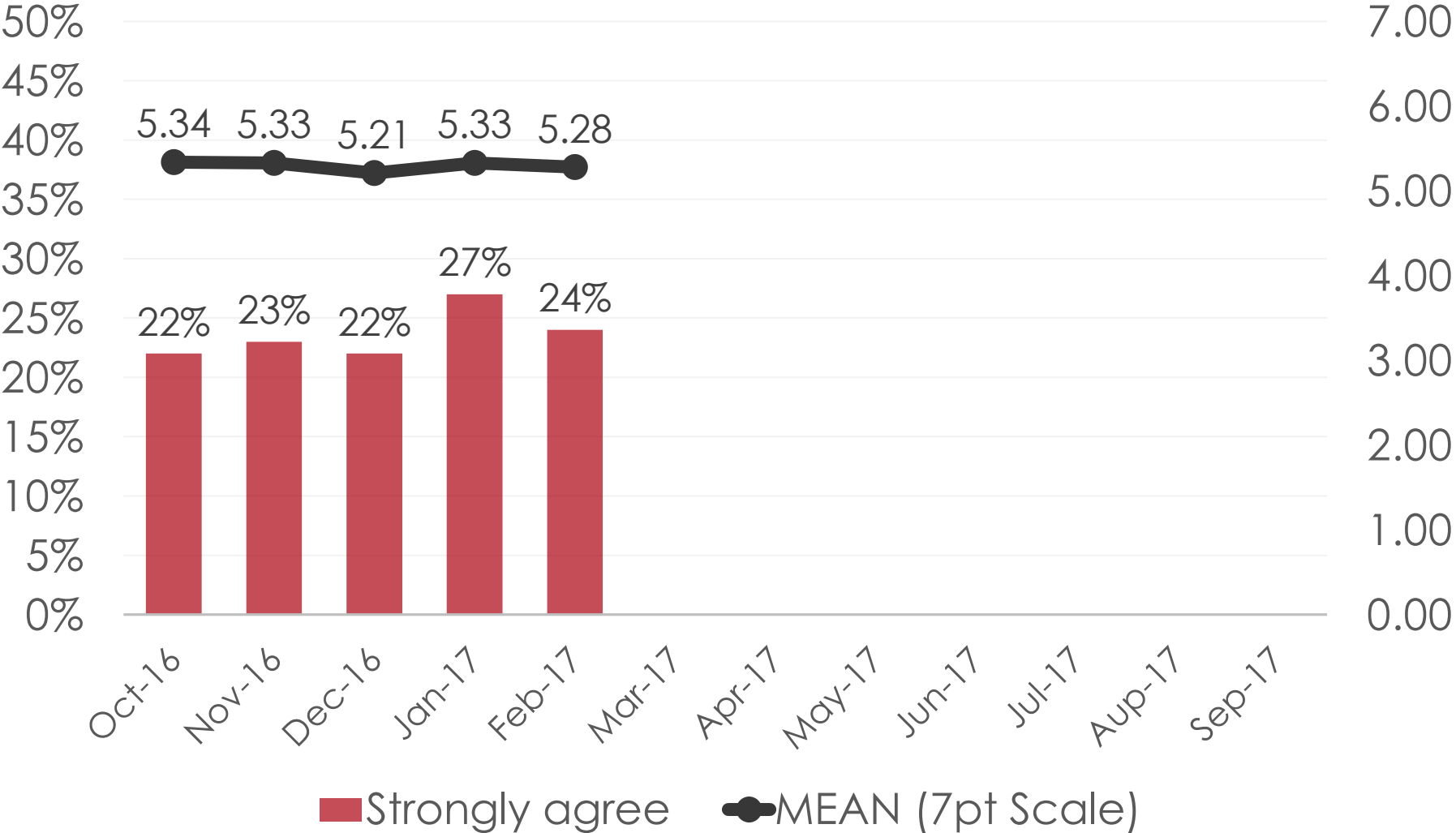
# Not enough night time activities



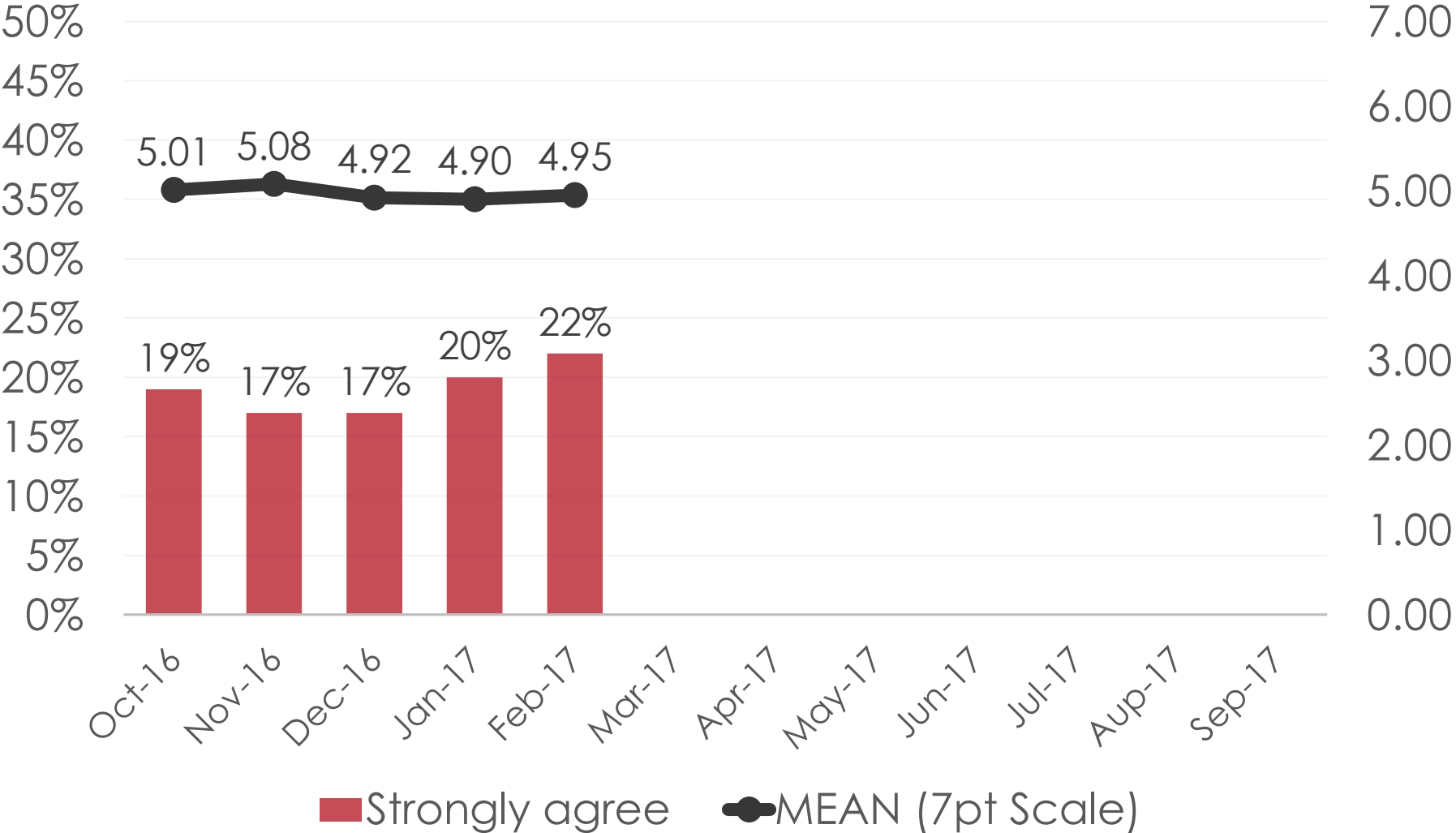
# Tour guides were professional



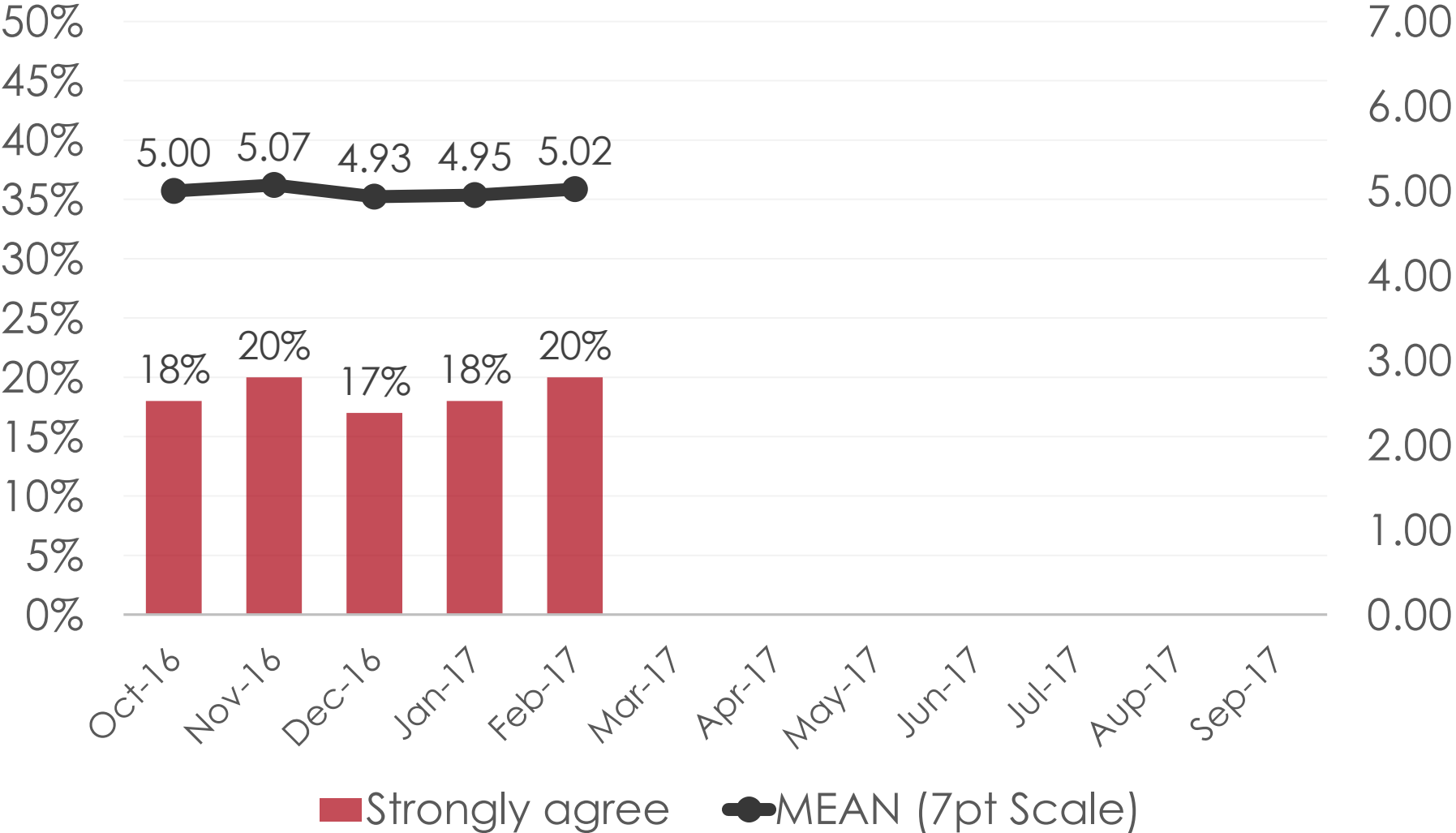
# Tour drivers were professional



# Taxi drivers were professional

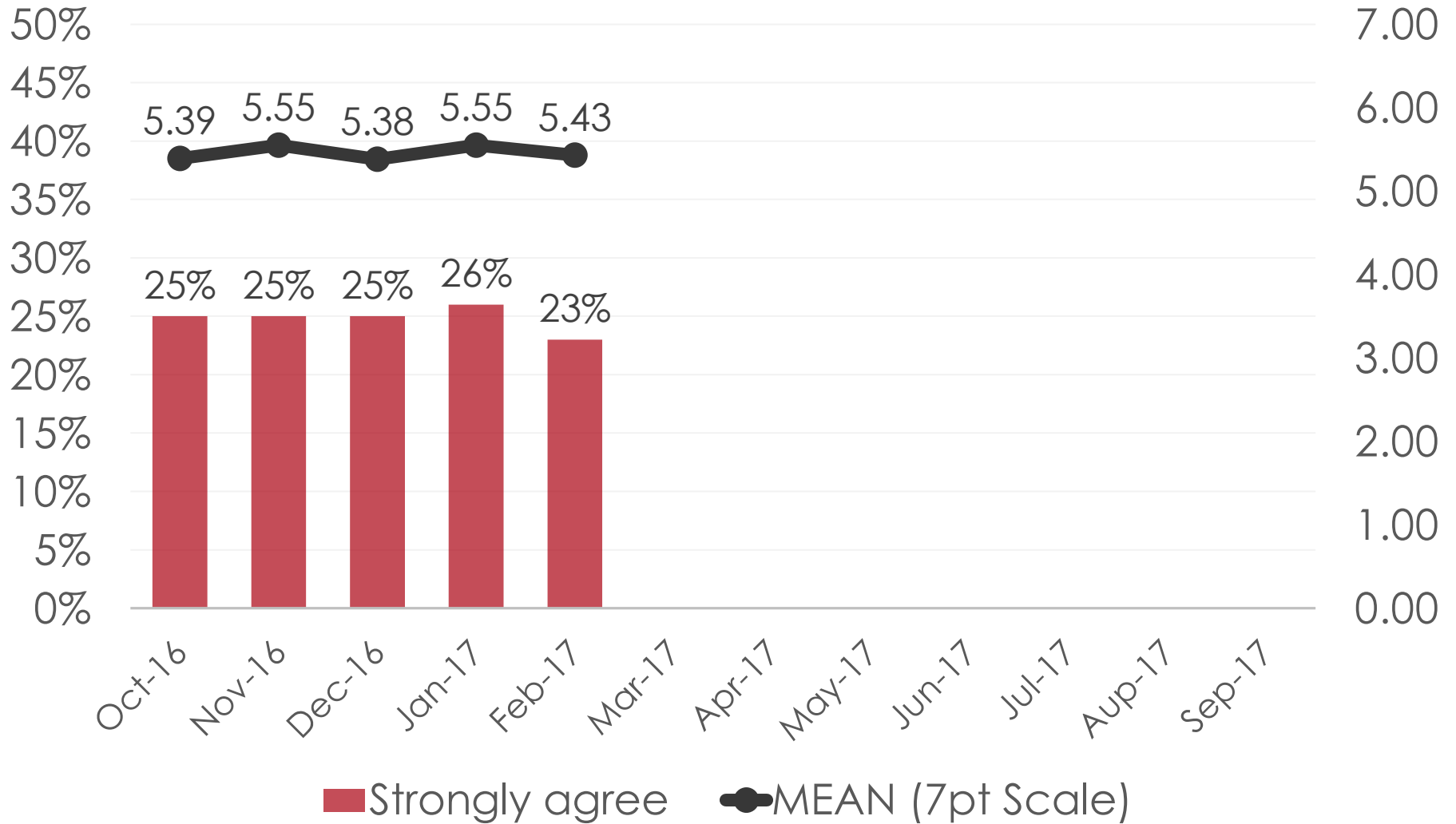


# Taxis were clean

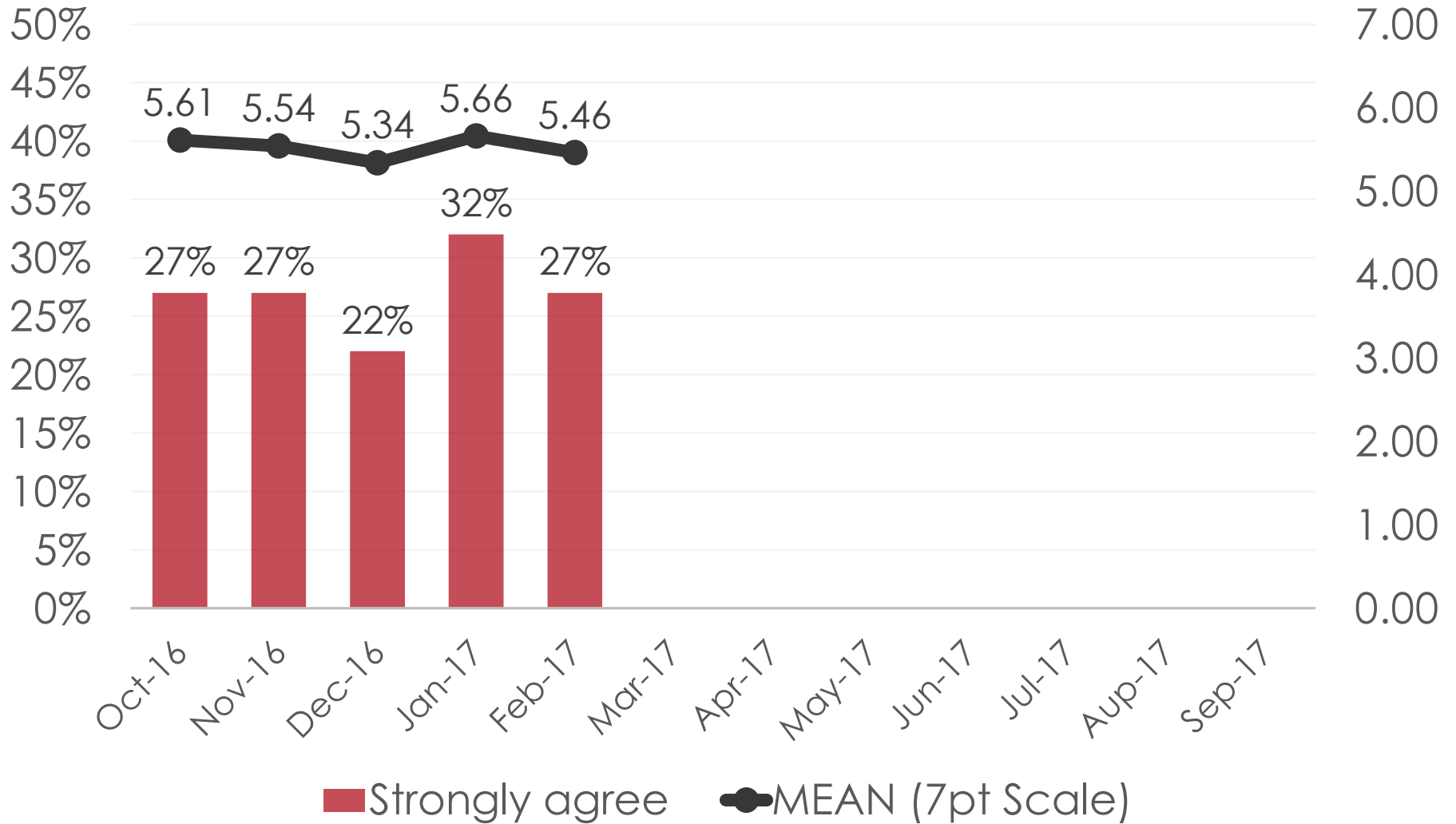




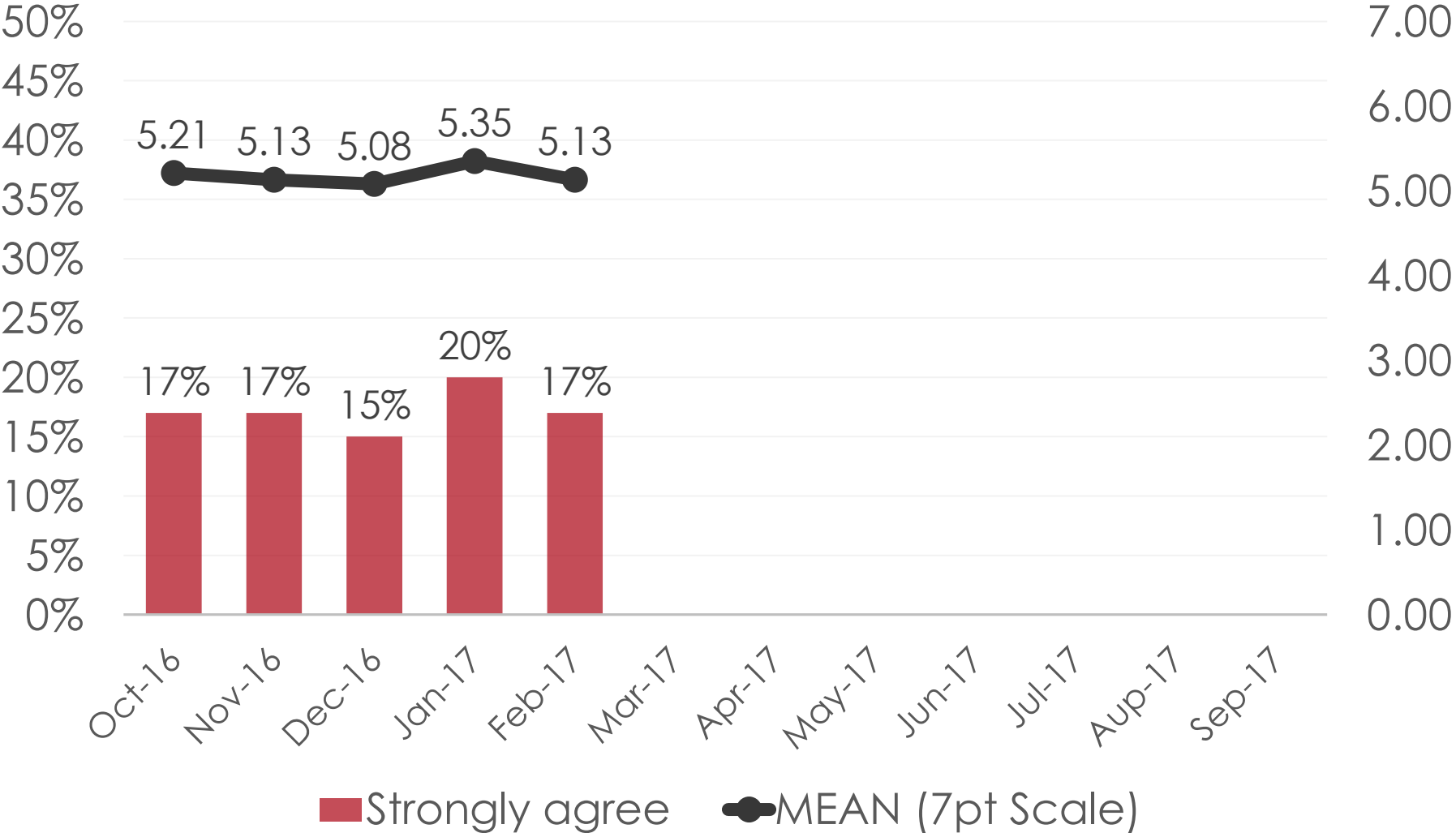
# Guam airport was clean



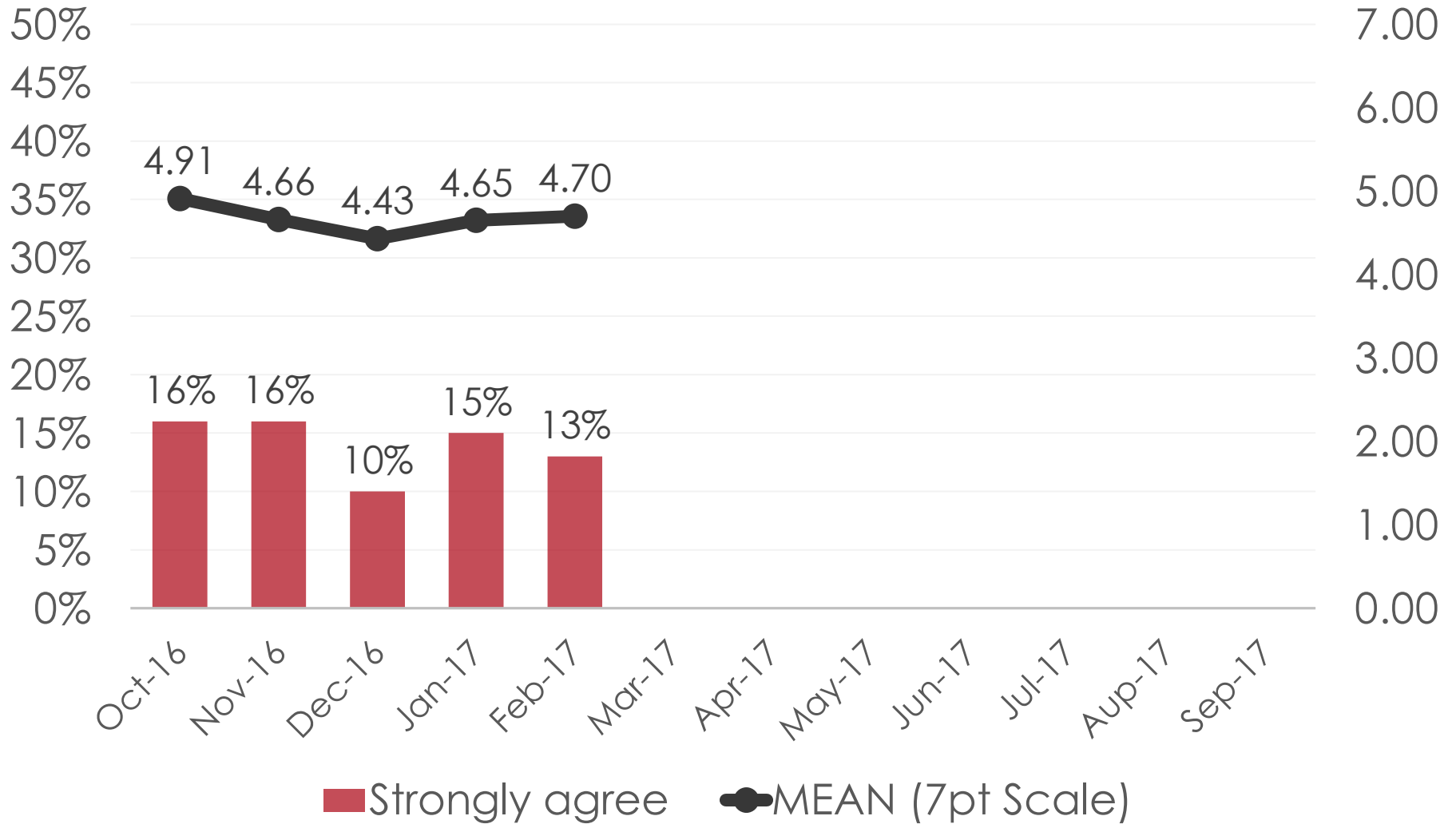
# Ease of getting around



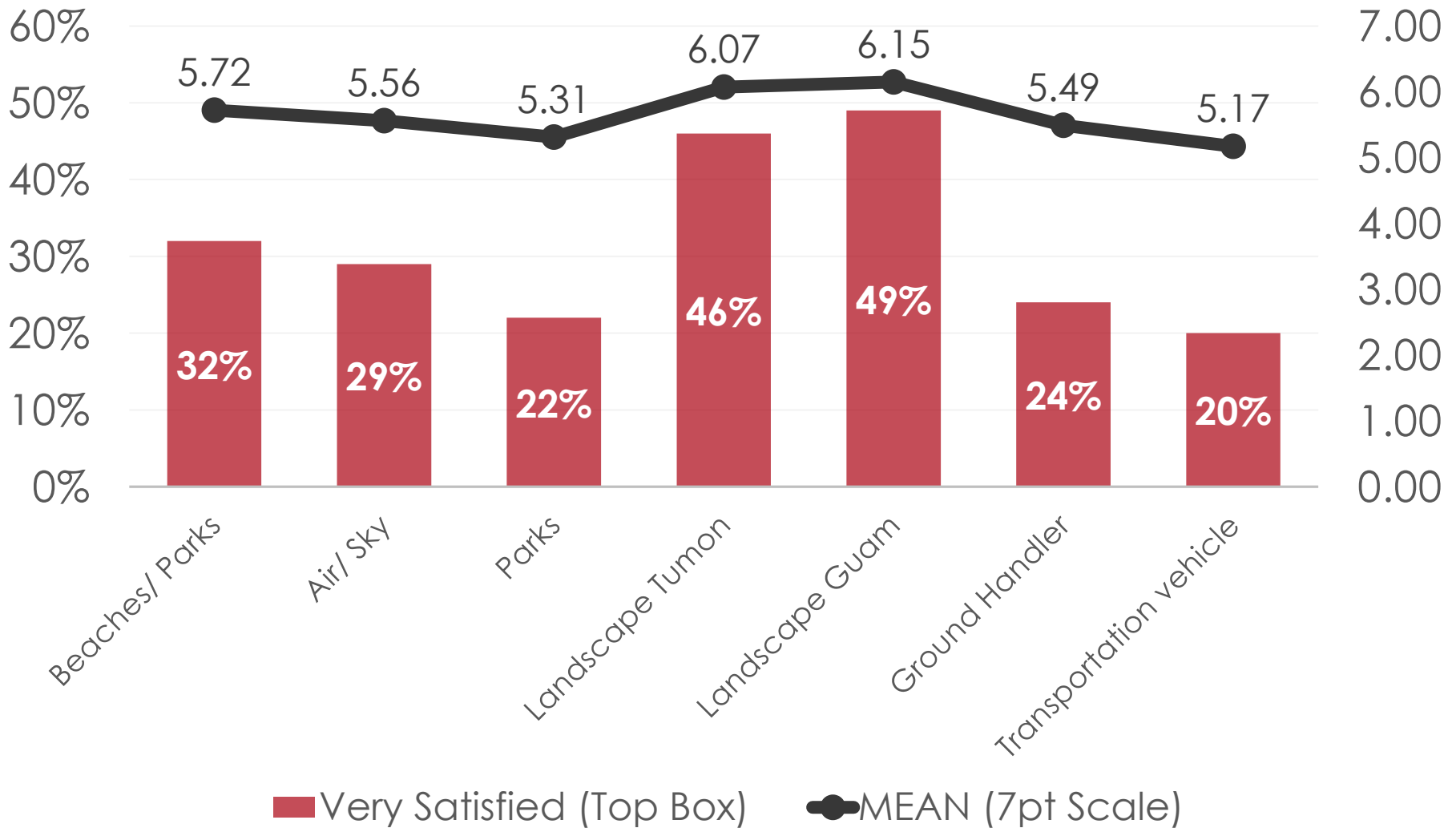
# Safety walking around at night



# Price of things on Guam

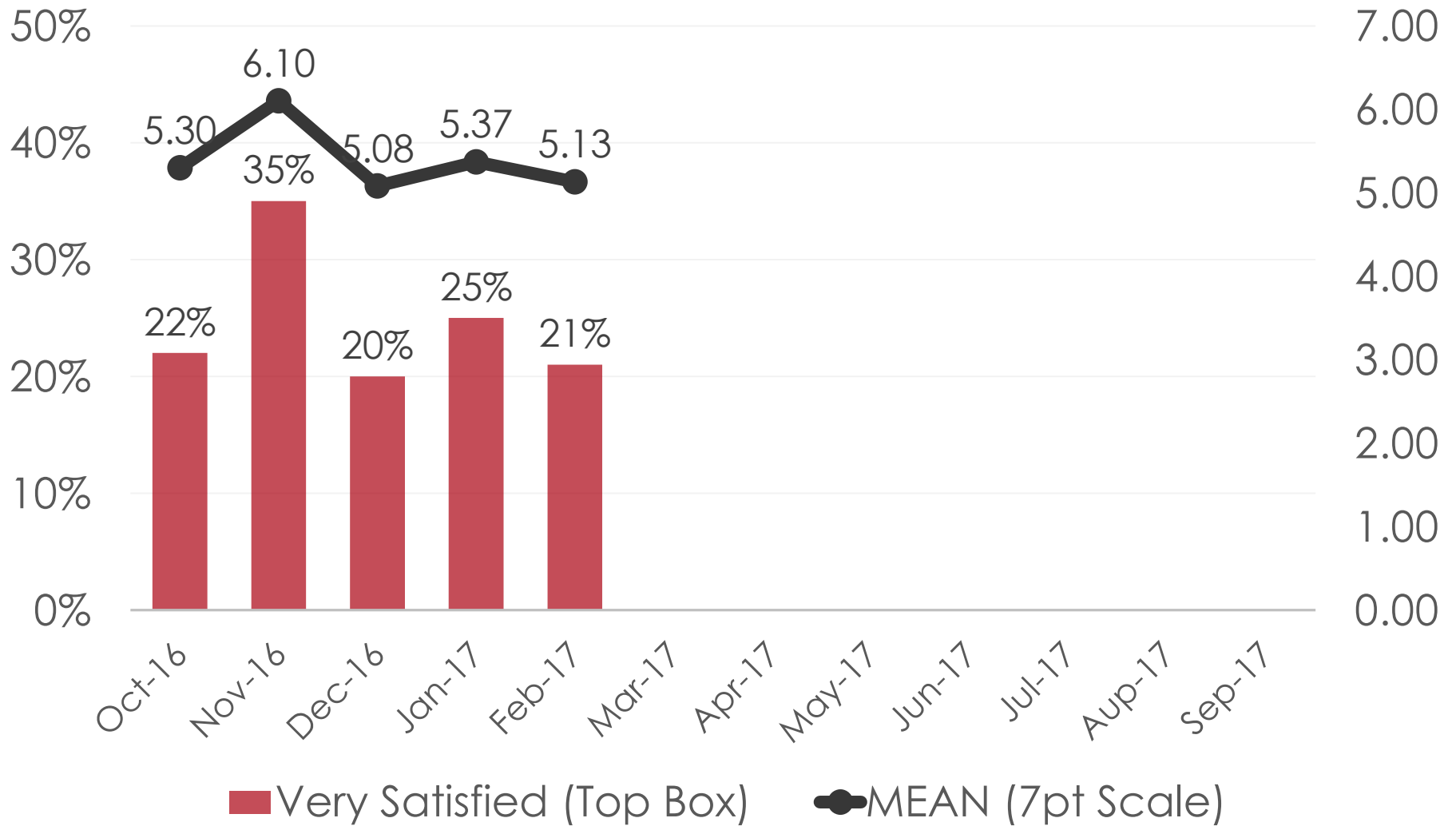


# GENERAL SATISFACTION – Quality/ Cleanliness

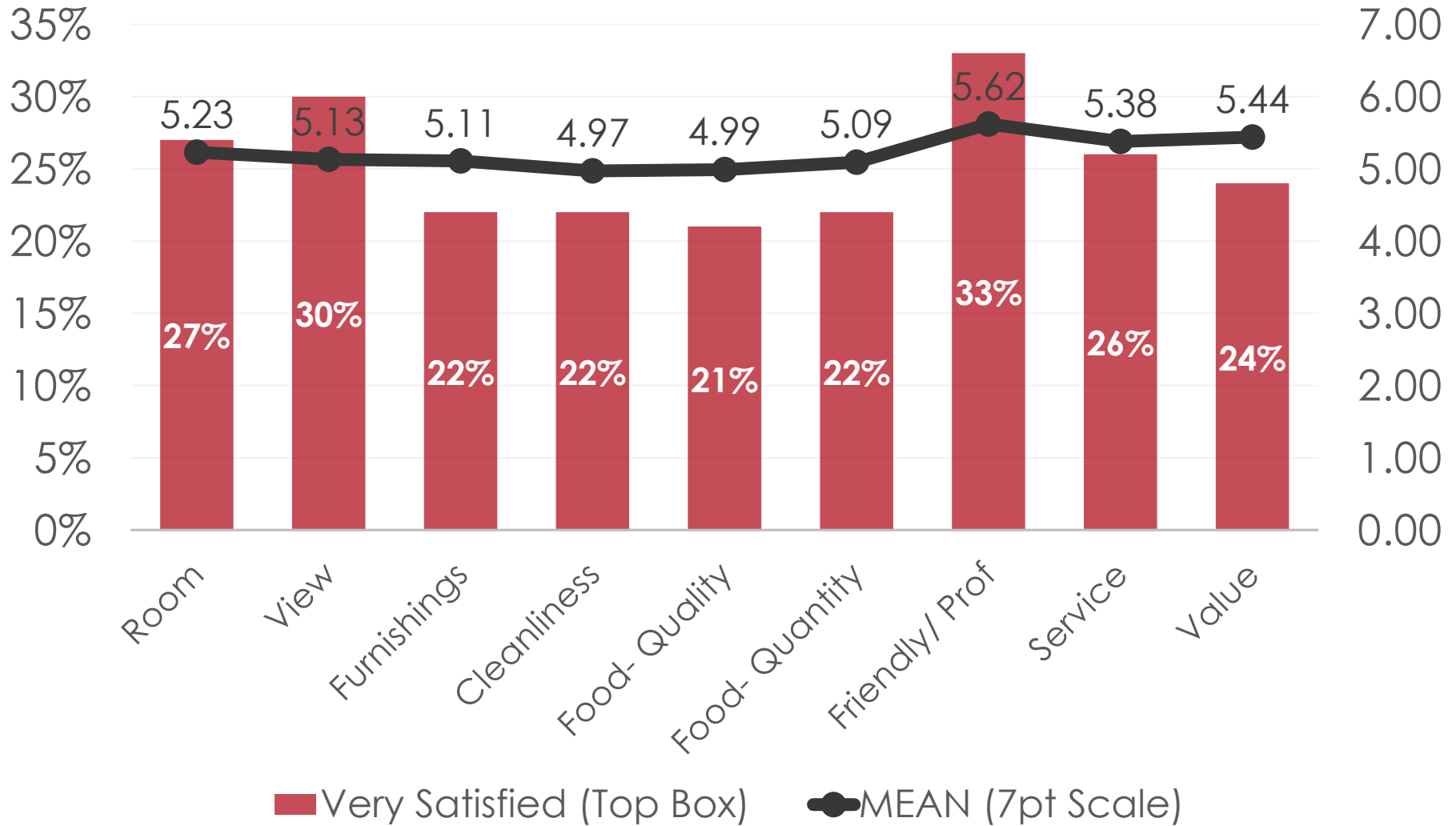


# ACCOMMODATIONS

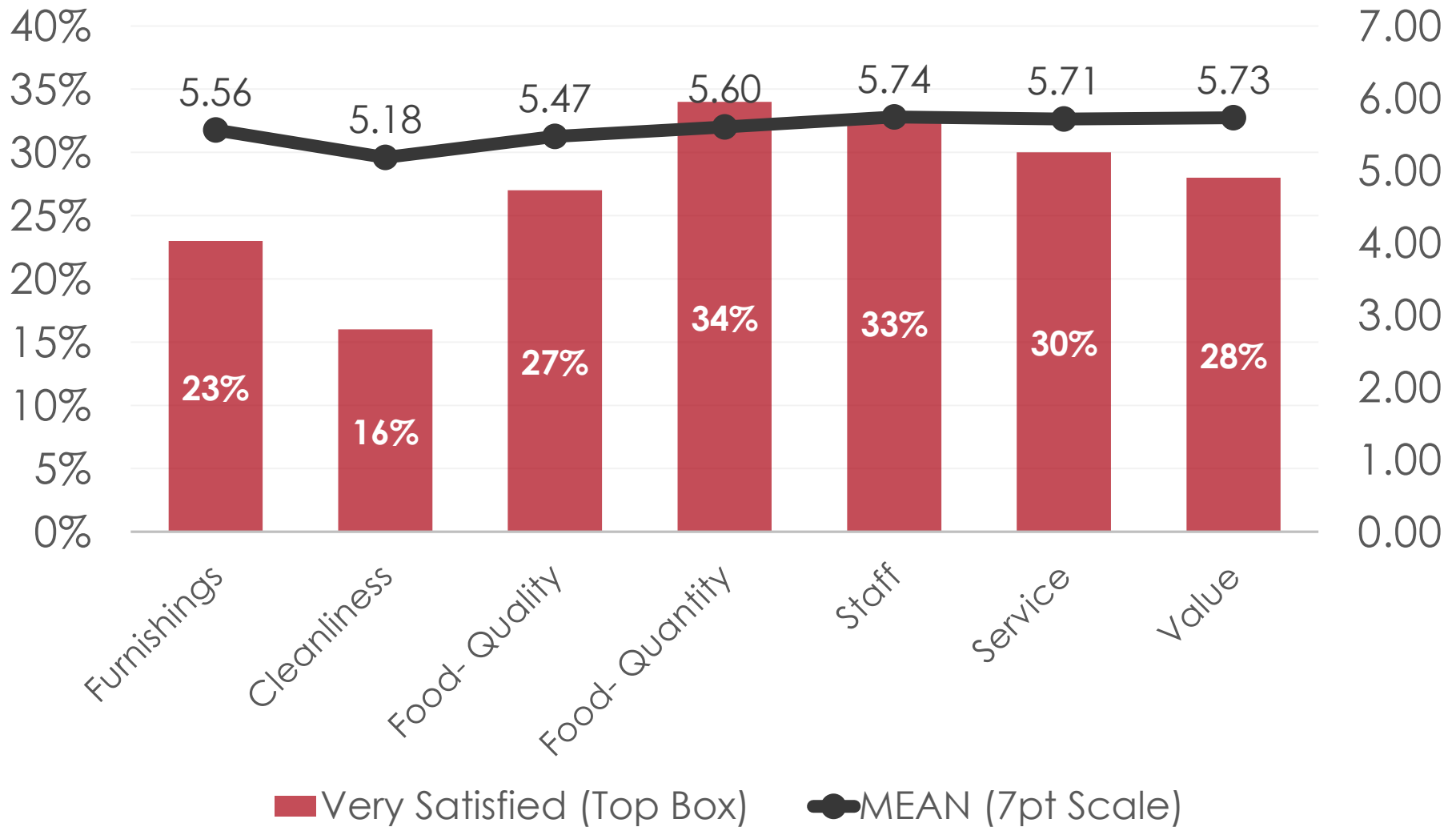
## OVERALL SATISFACTION



# ACCOMMODATIONS – Satisfaction by Category

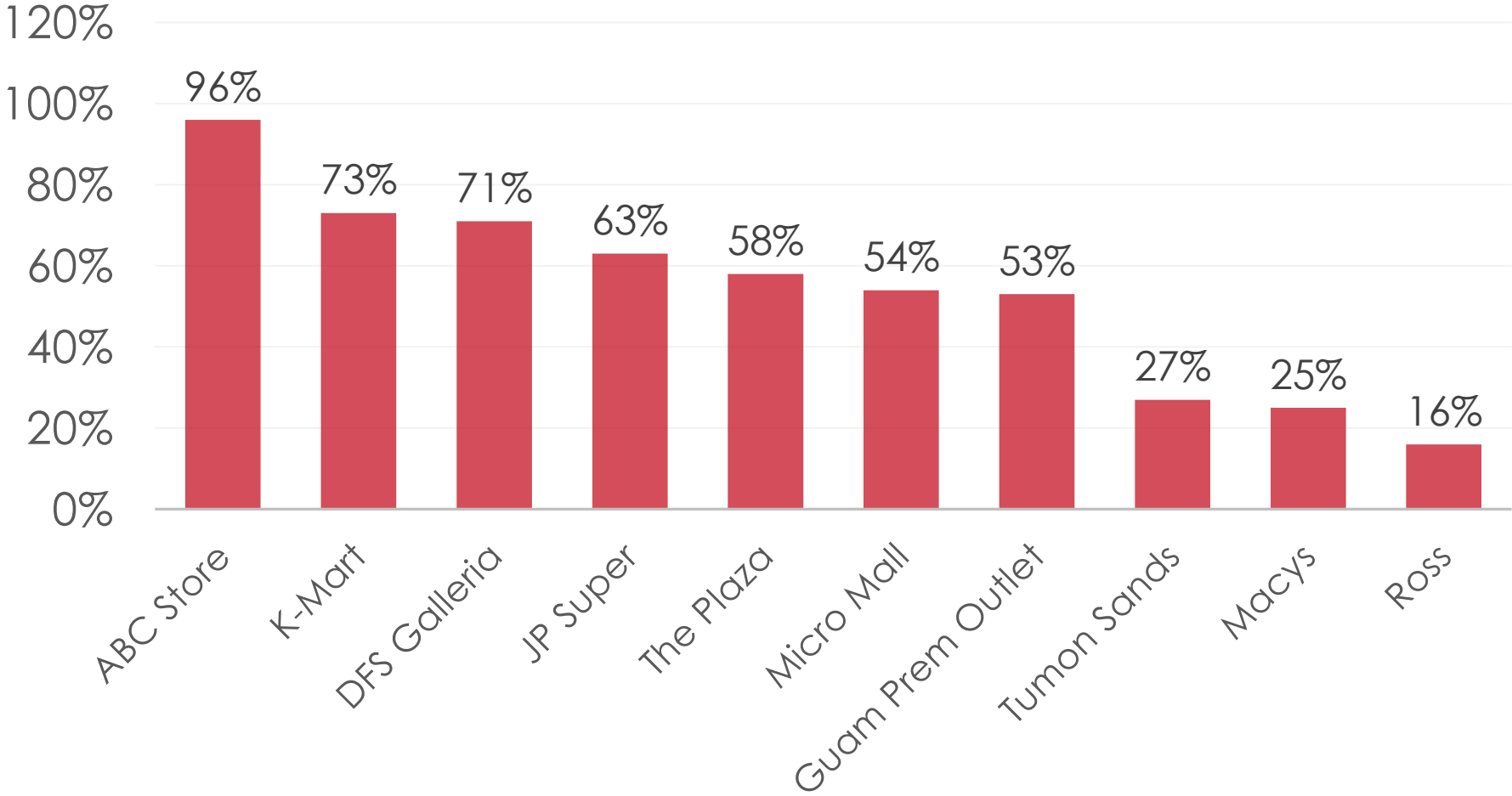


# DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category

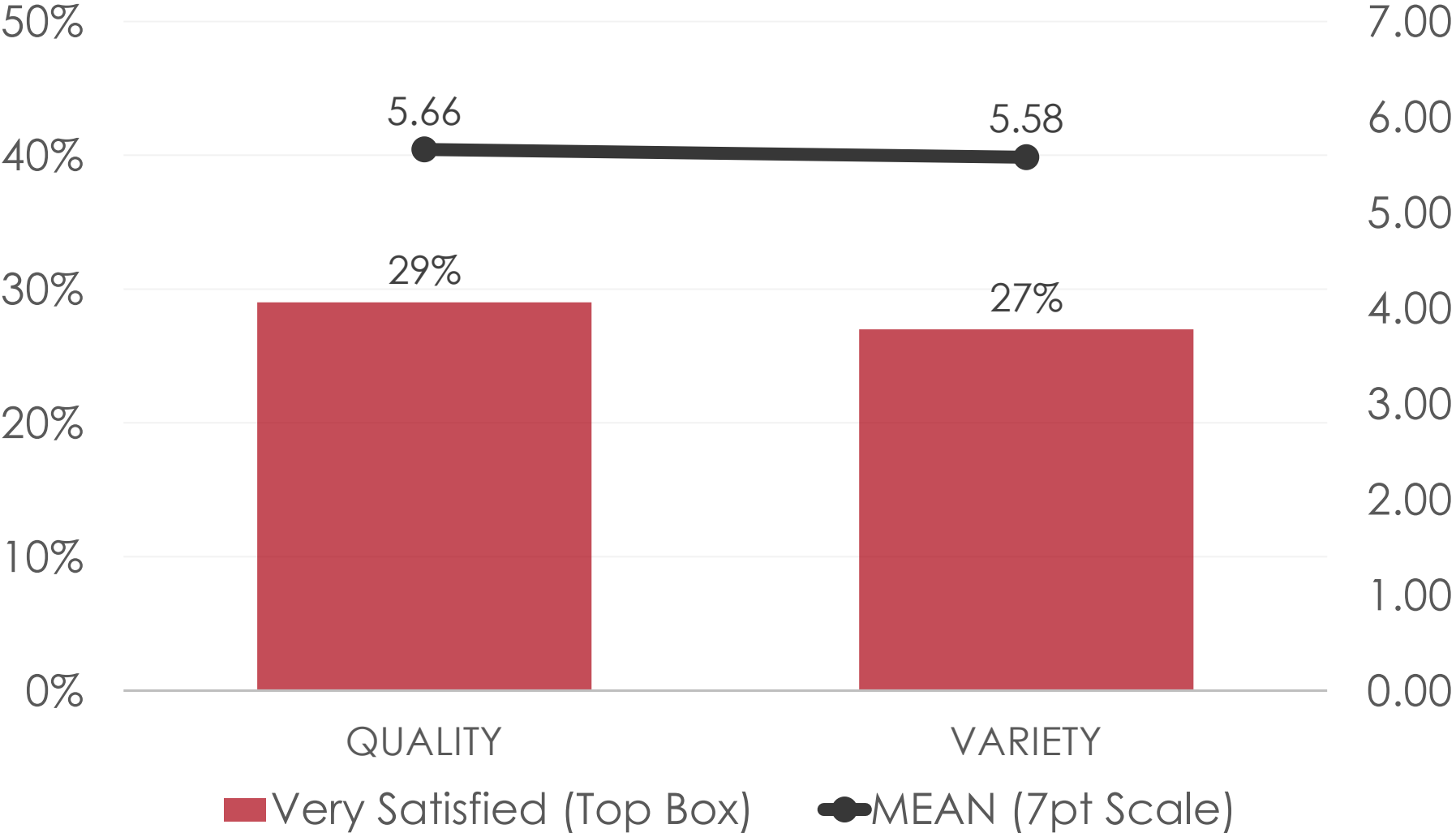




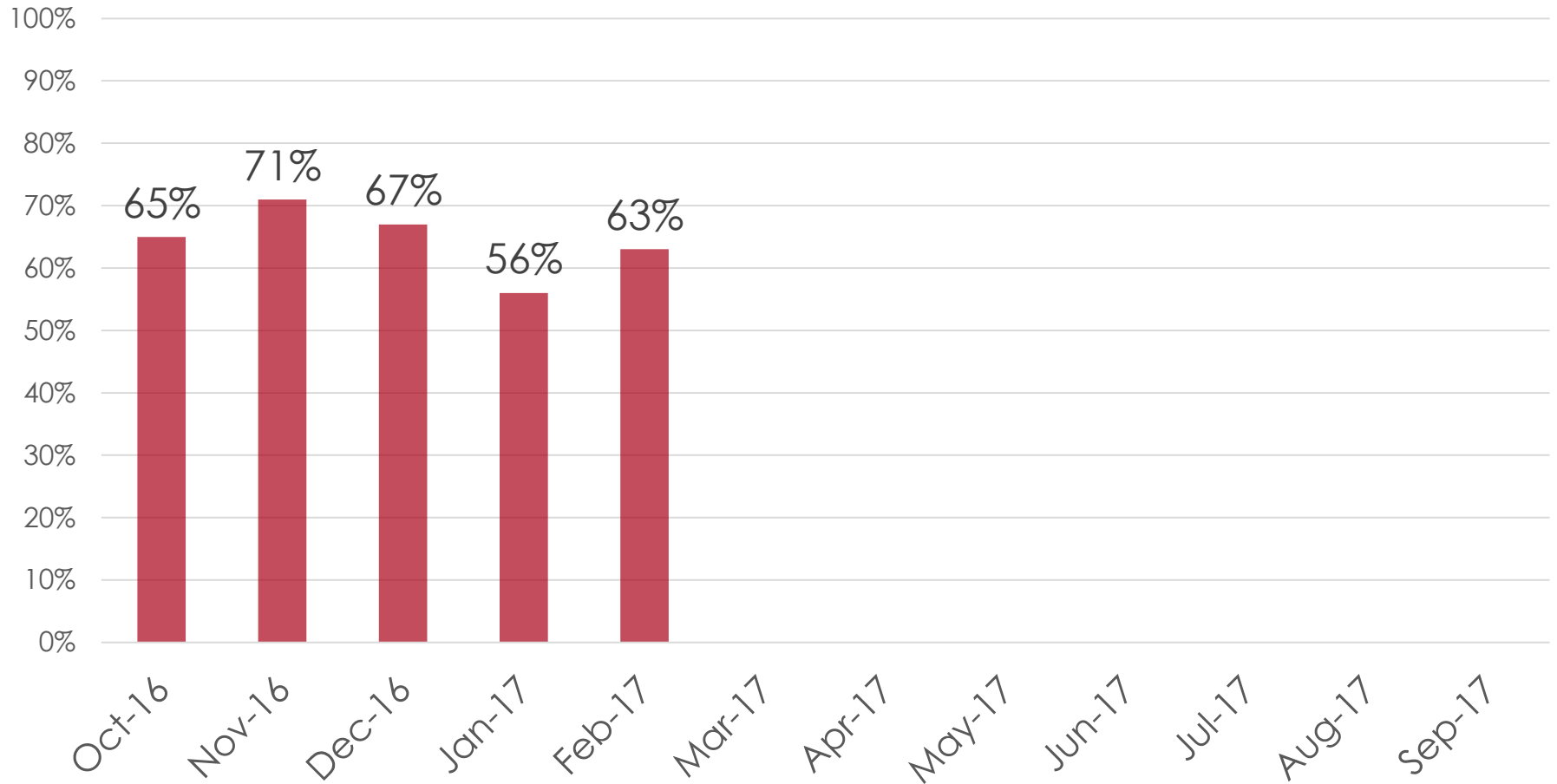
# Shopping Malls/ Stores (Top Responses)



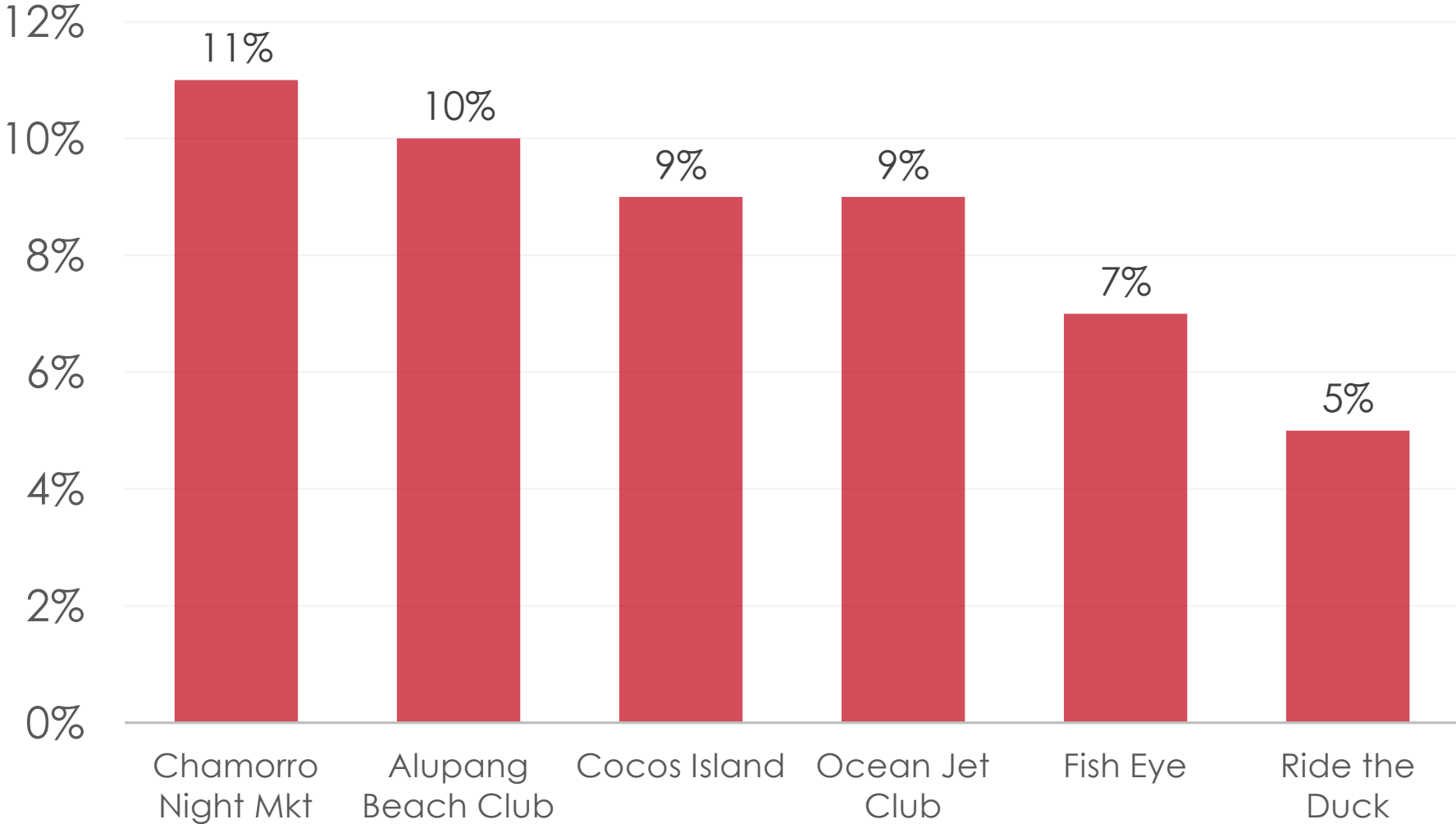
# SHOPPING - SATISFACTION



# OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

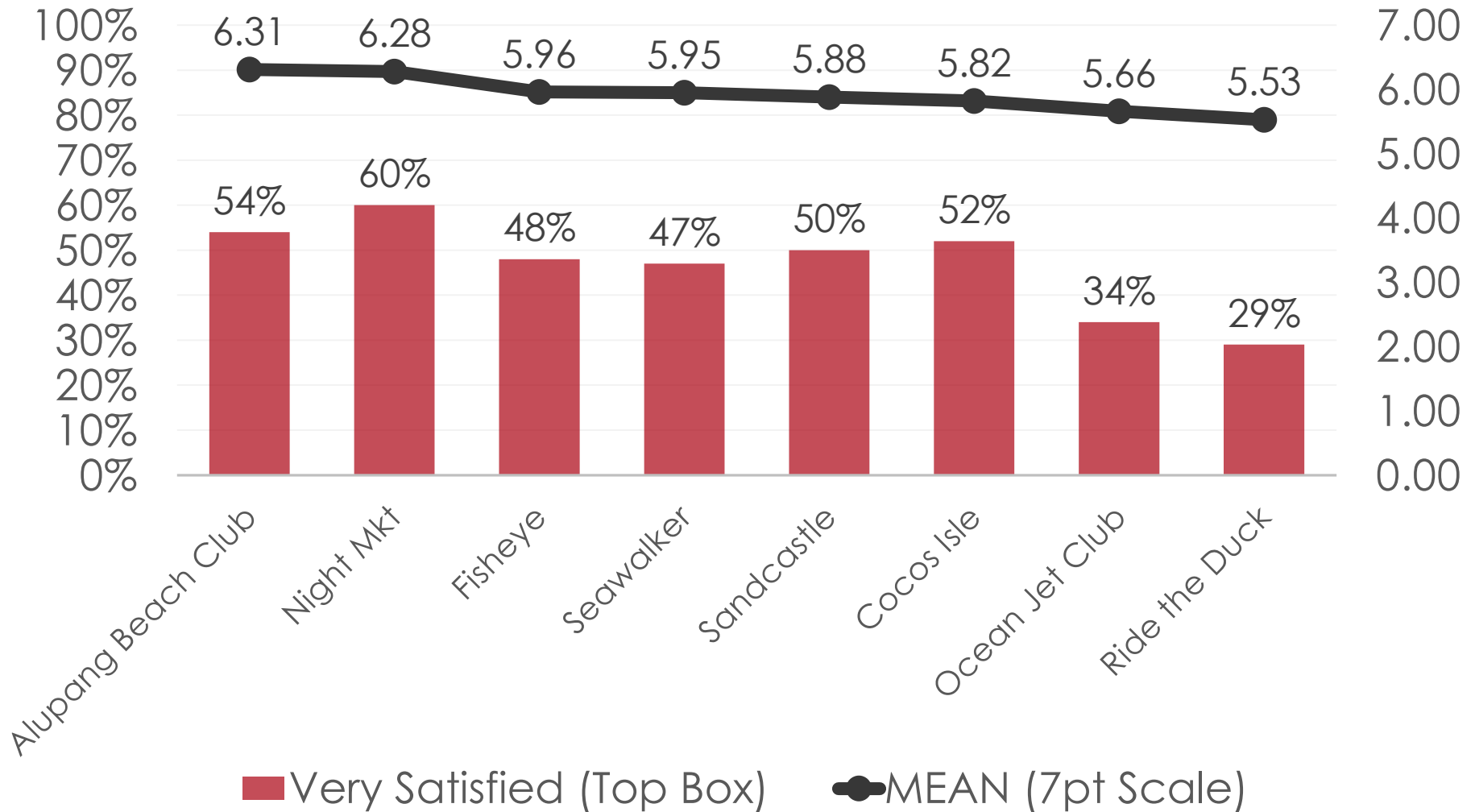


# Optional Tour Participation (Top Responses)

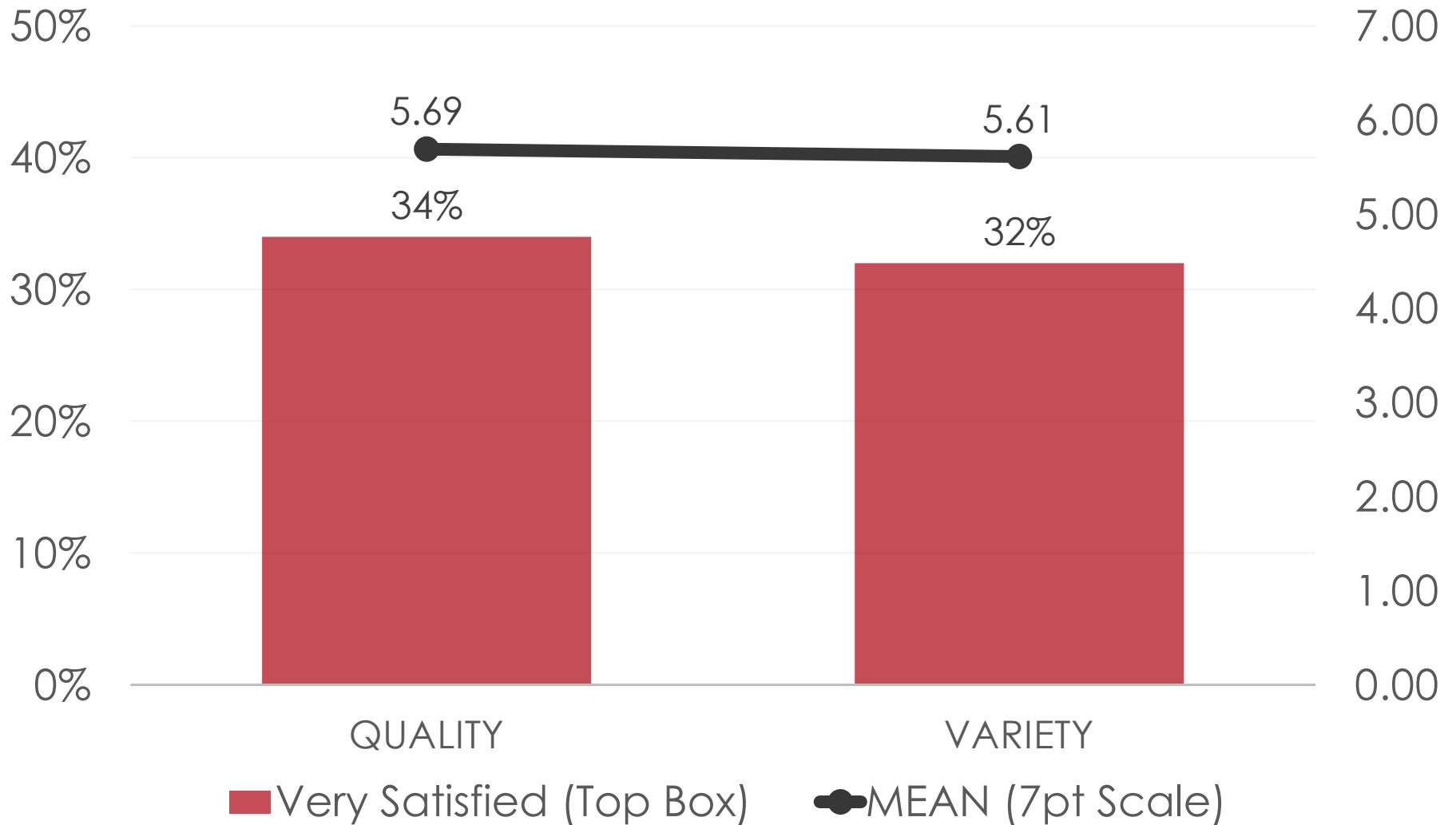


# Optional Tour Satisfaction

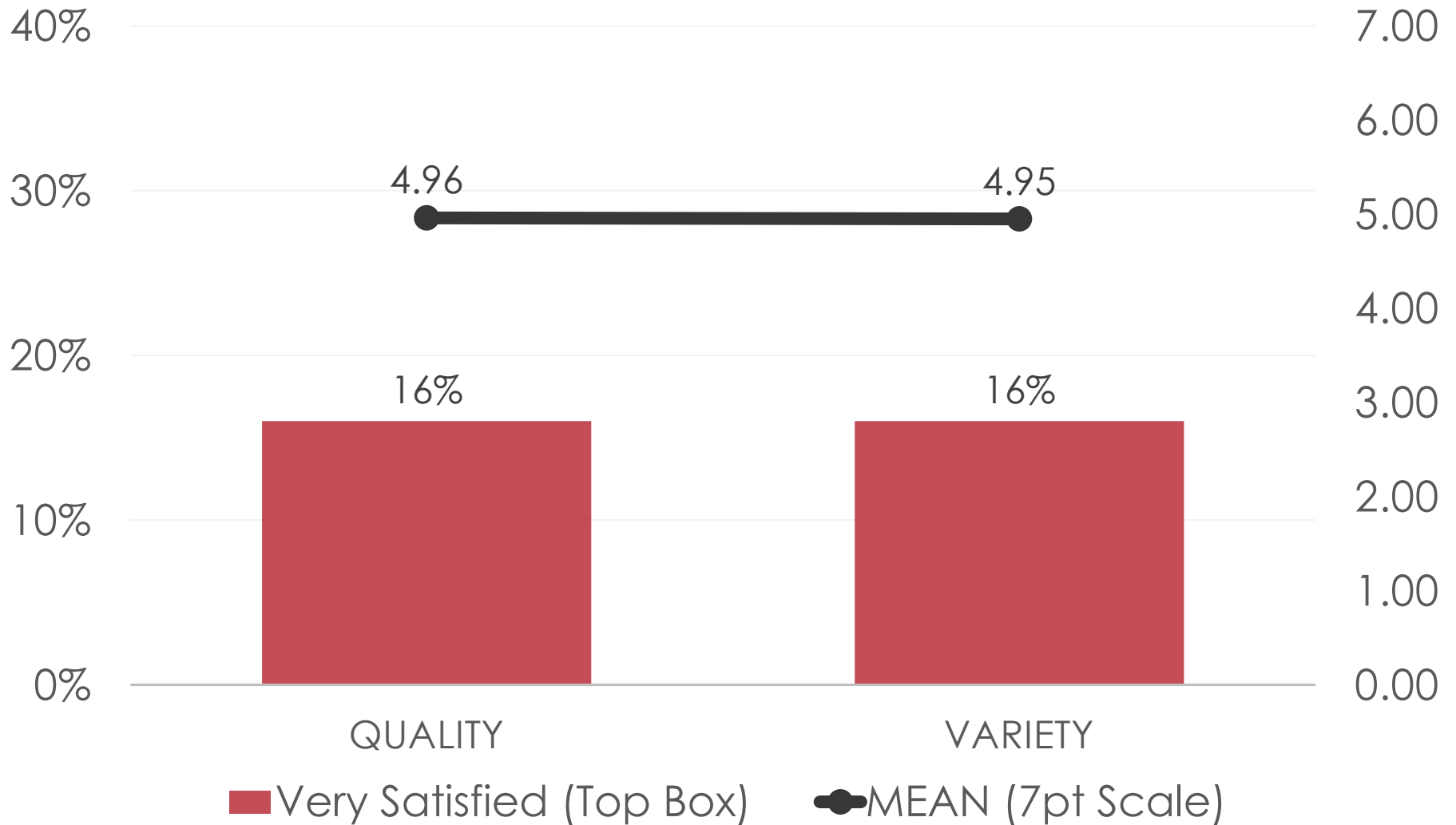
## Top Responses only - Participation (5%+)



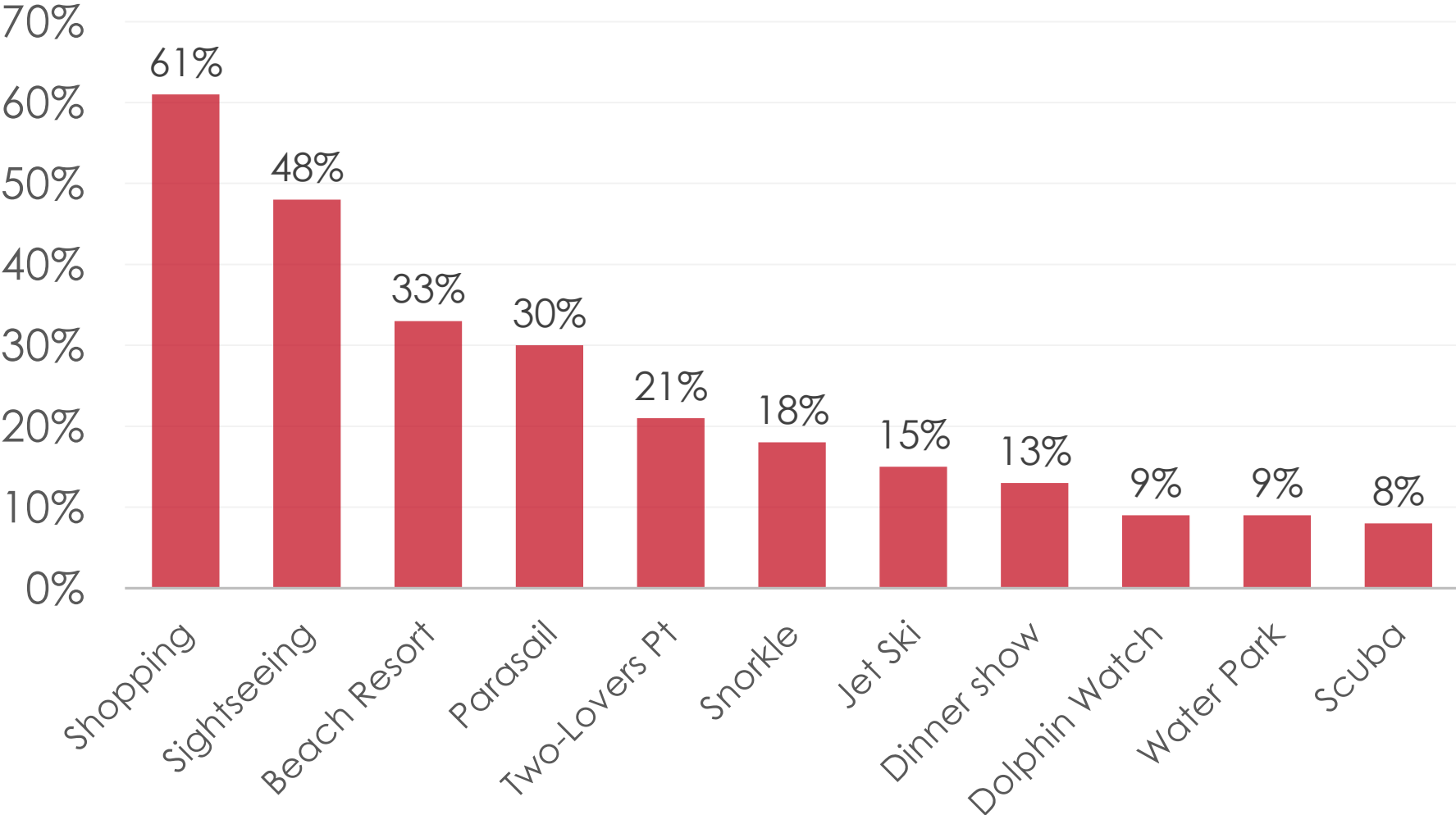
# DAY TOUR - SATISFACTION



# NIGHT TOUR - SATISFACTION



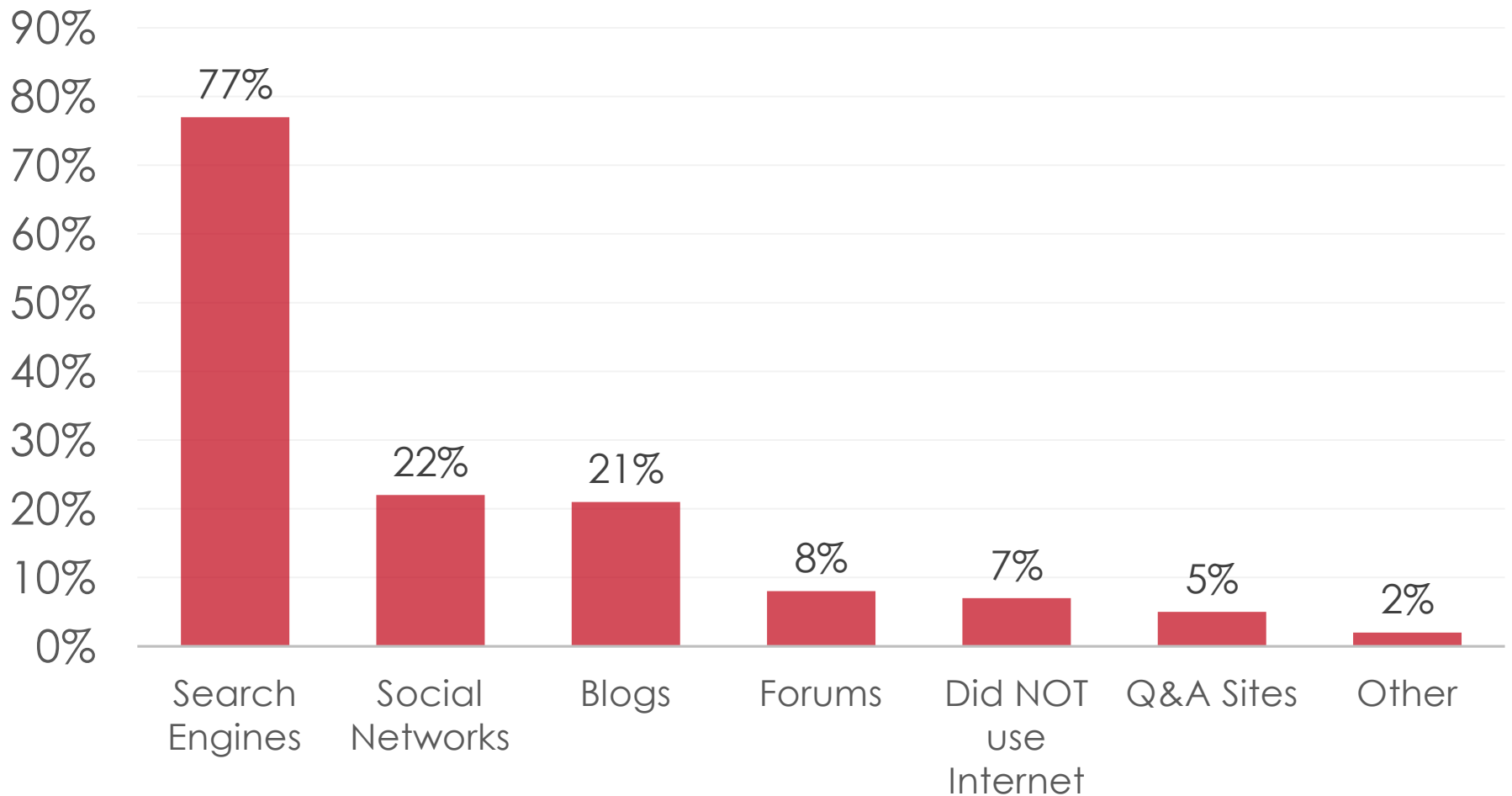
# Activities Participation (Top Responses)





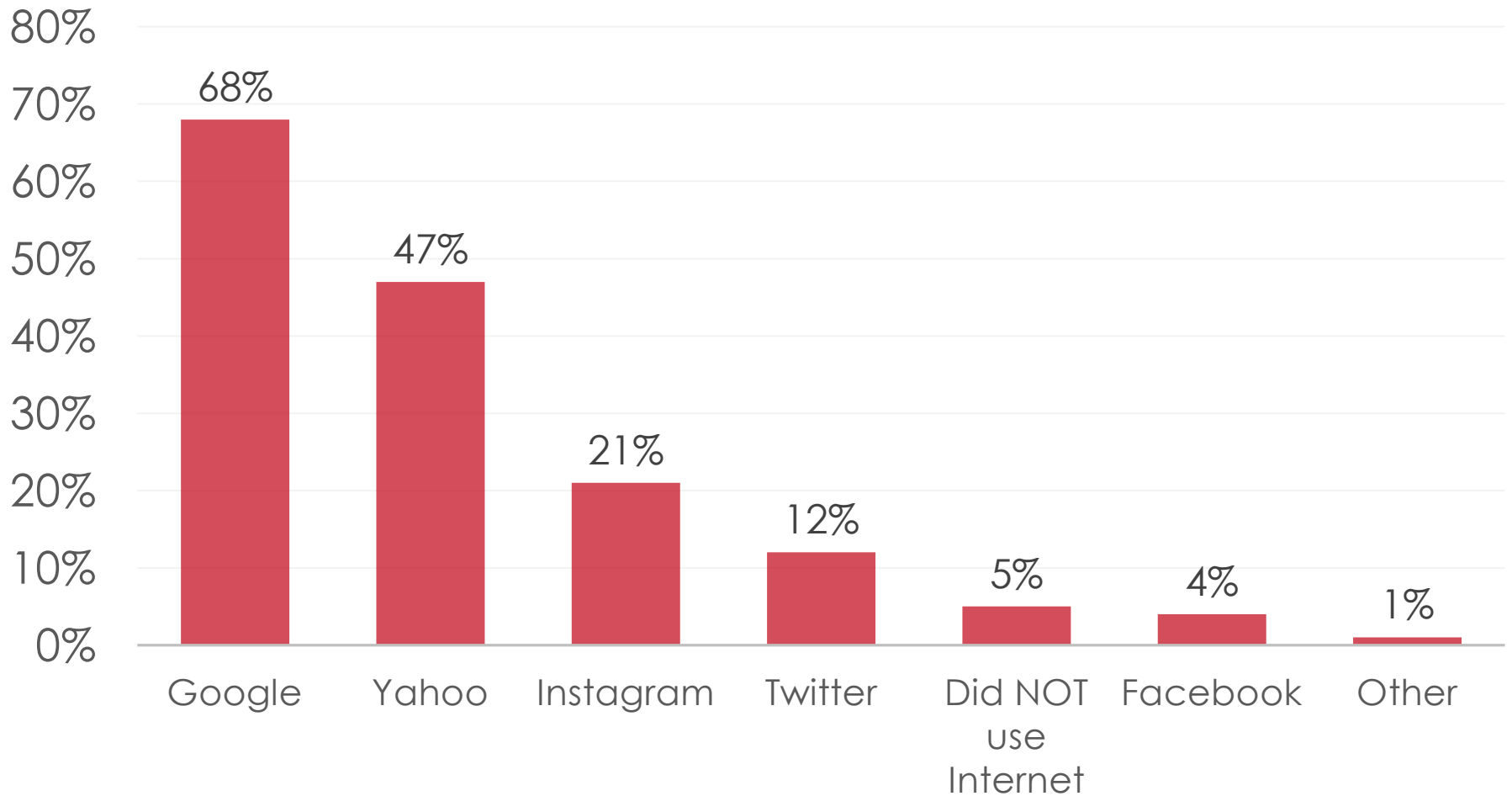
# SECTION 5 PROMOTIONS

# INTERNET- GUAM SOURCES OF INFORMATION



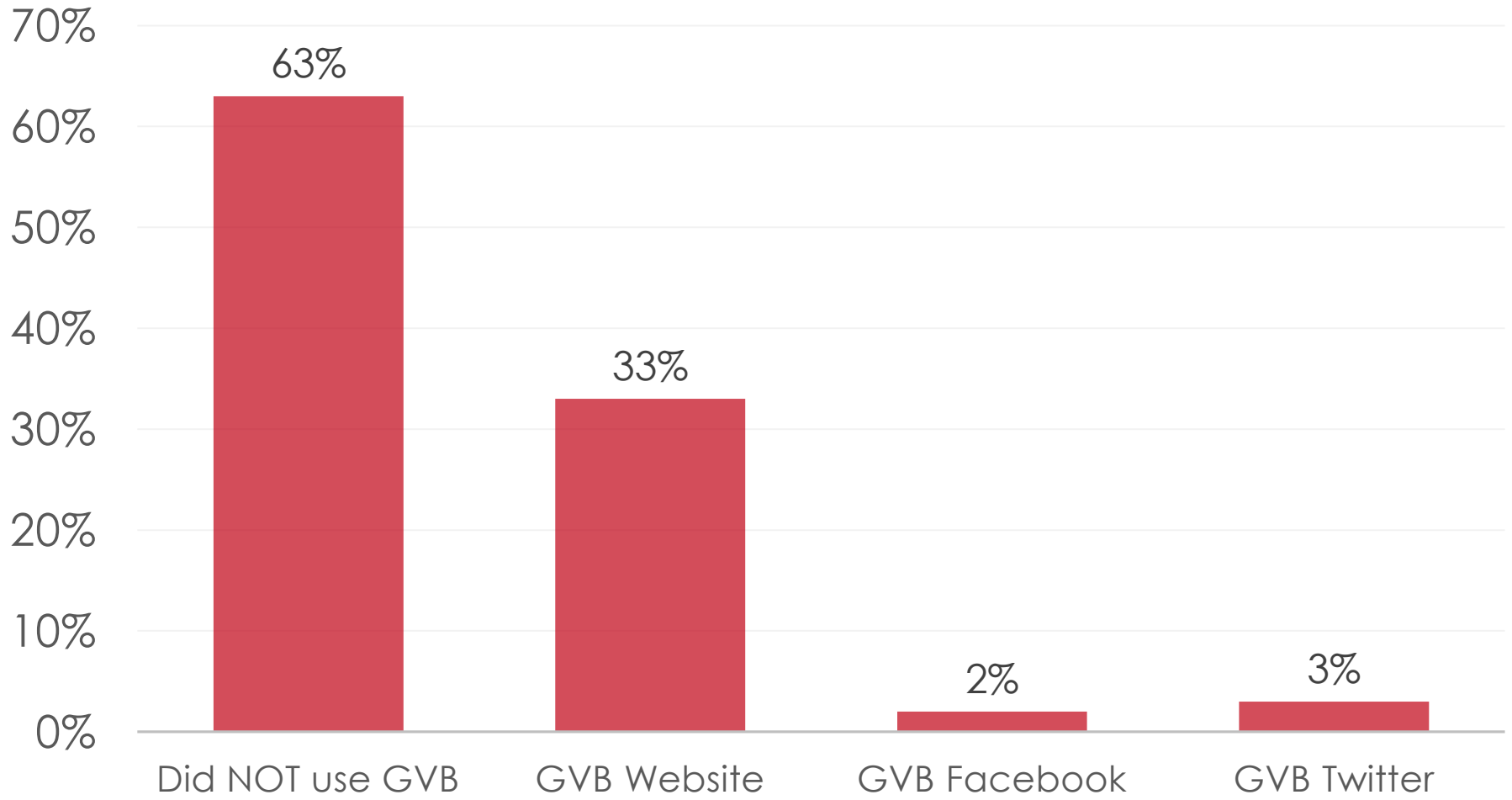
# INTERNET- SOURCES OF INFORMATION

## Things to do on Guam

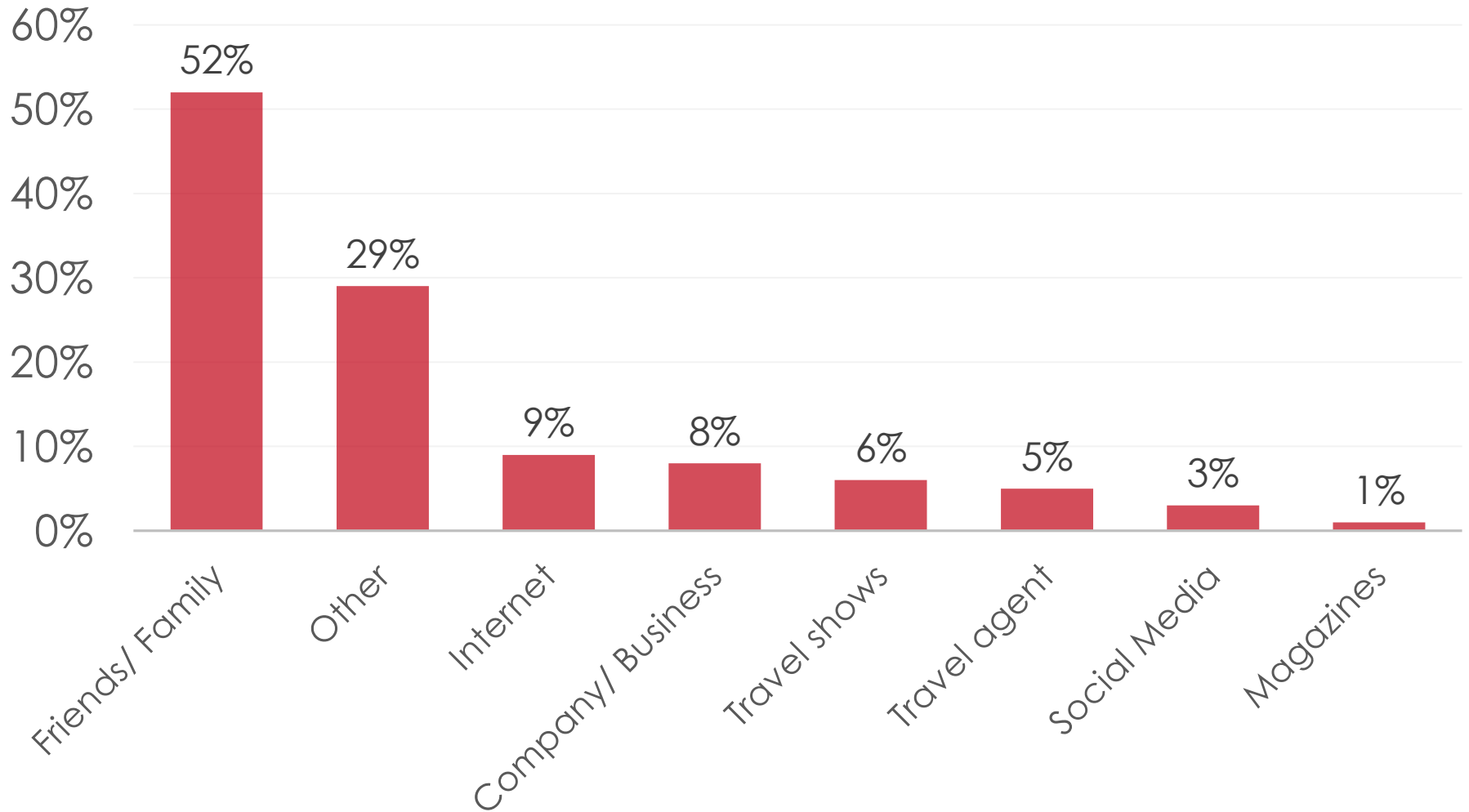


# INTERNET- SOURCES OF INFORMATION

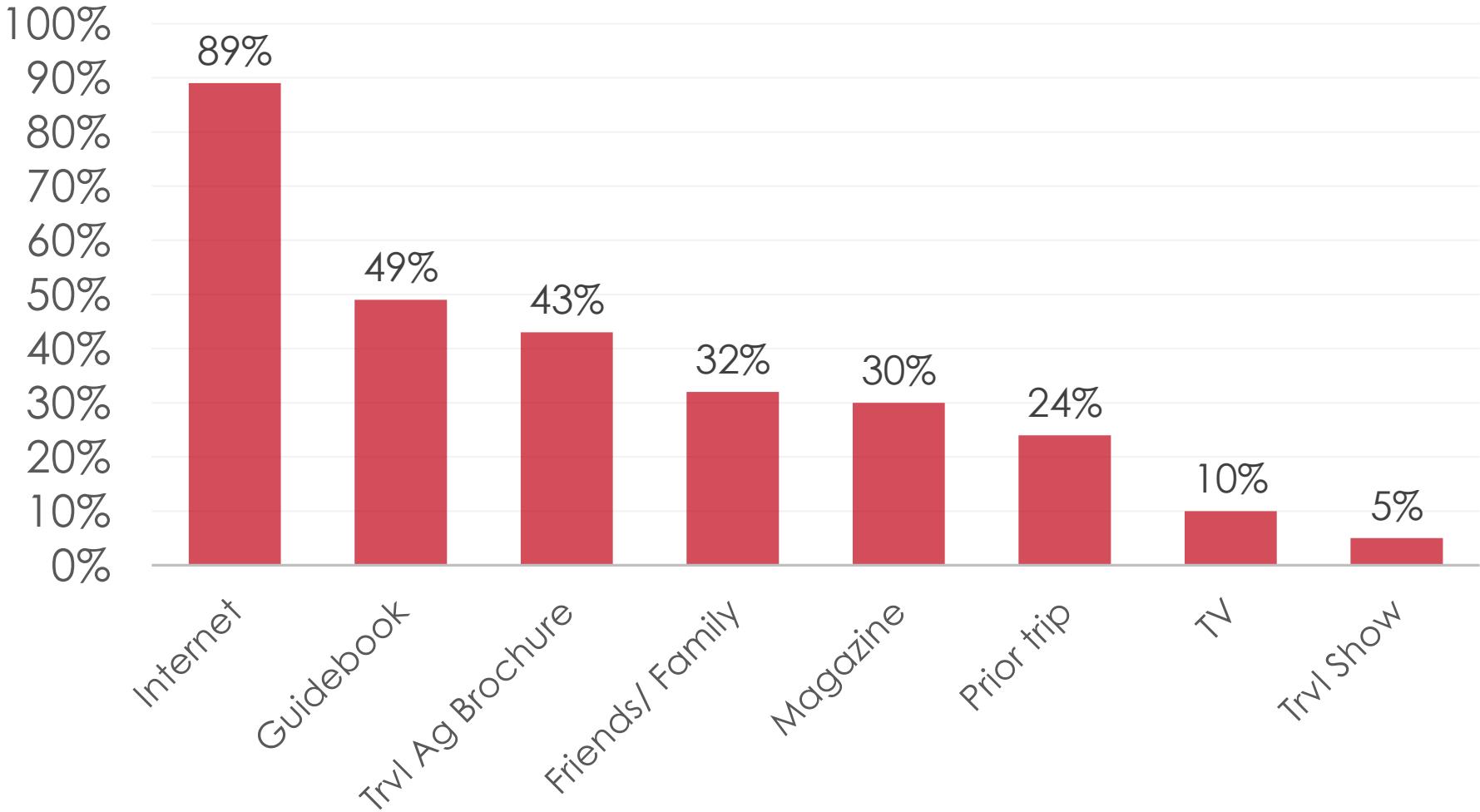
## GVB



# TRAVEL MOTIVATION



# PRE-ARRIVAL SOURCES OF INFORMATION



# PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

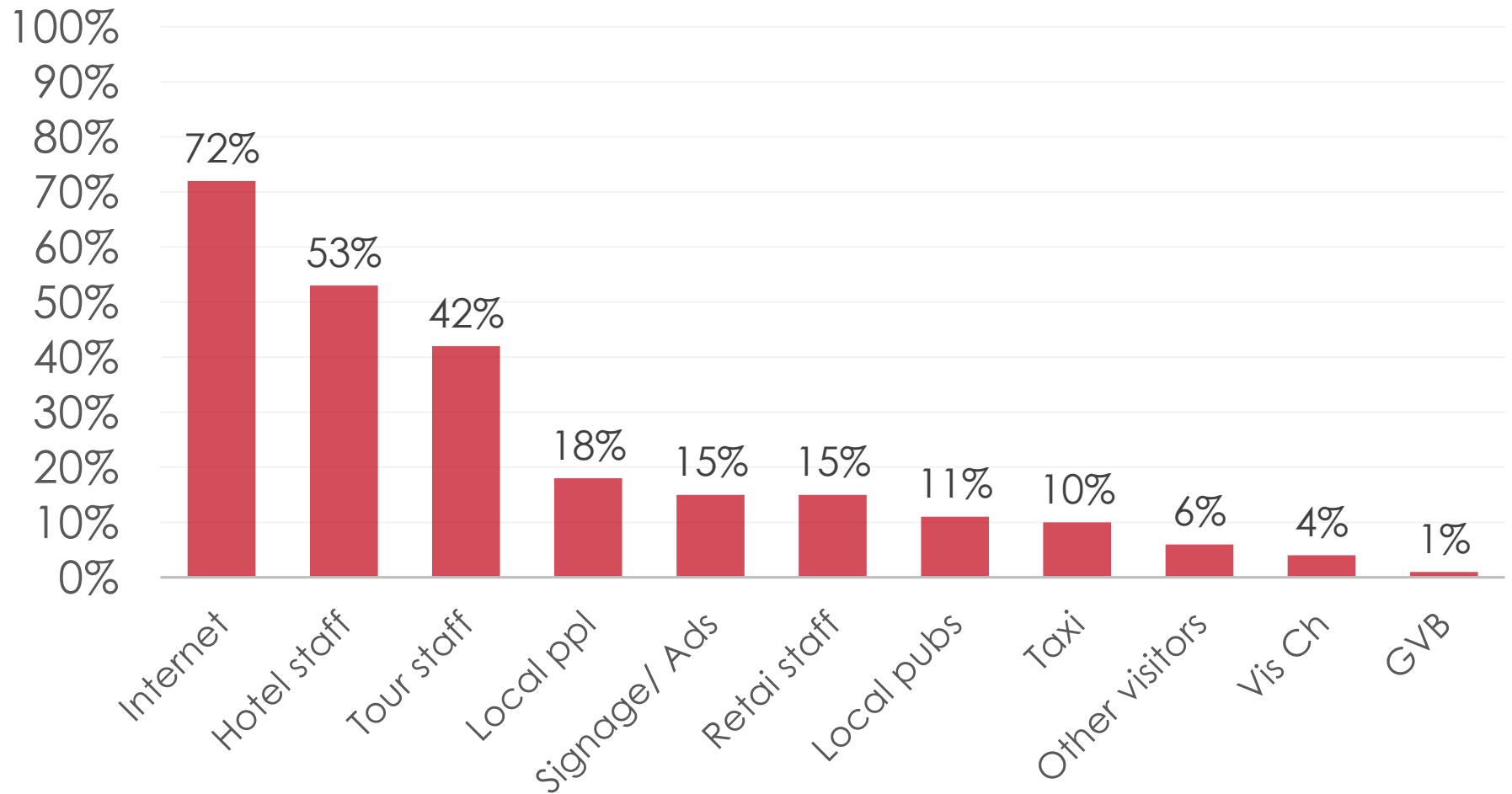
Q1 Please select the top 3 sources of information you used to find out about Guam before you trip.

		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
Q1	Internet	89%	86%	95%	81%	69%	73%	86%	93%
	Travel Guidebook- Bookstore	49%	49%	45%	50%	31%	60%	37%	50%
	Travel Agent Brochure	43%	43%	41%	50%	31%	67%	27%	21%
	Friend/ Relative	32%	26%	36%	25%	25%	13%	27%	14%
	Magazine (Consumer)	30%	27%	36%	25%	38%	27%	28%	36%
	Prior Trip	24%	36%	32%	13%	50%	20%	70%	43%
	TV	10%	5%	5%	19%			11%	7%
	Consumer Trvl Show	5%	7%		19%			3%	
	Co-Worker/ Company Trvl Dept	3%	2%	5%		6%		4%	14%
	Other	2%	3%			6%	7%	2%	
	Travel Trade Show	1%	2%				7%	2%	
	GVB Promo	1%	1%			6%		1%	
	Newspaper	1%	1%					2%	
	Radio	1%	1%					1%	
	Theater Ad	0%						1%	
	Total	352	91	22	16	16	15	122	14

Prepared by QMark Research

# ONISLE

## SOURCES OF INFORMATION





# ON-ISLE SOURCES OF INFORMATION – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

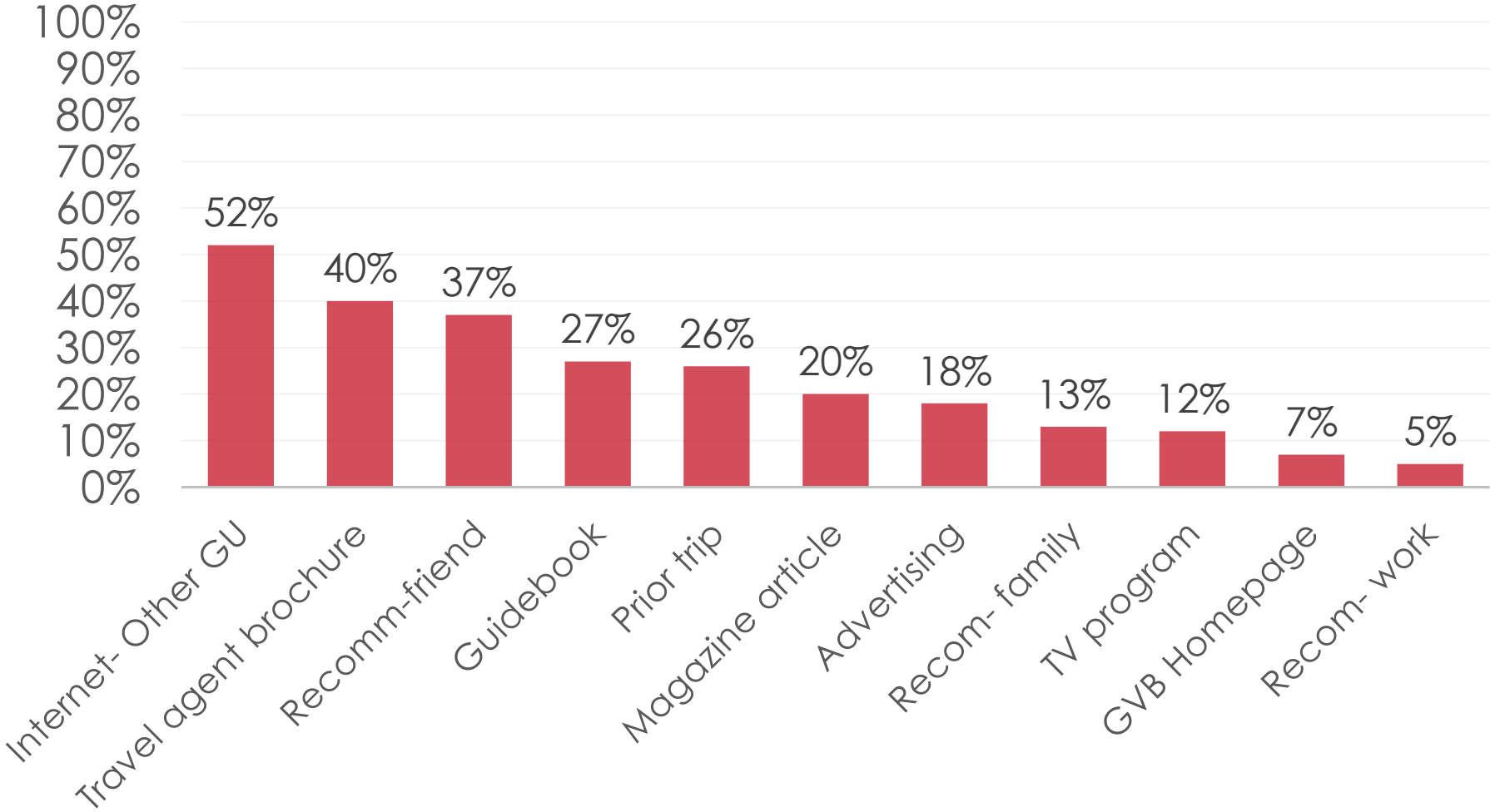
Q2 Please select the top 3 sources of information you used to find out about Guam while you were here.

		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
Q2	Internet	72%	71%	73%	63%	53%	47%	64%	64%
	Hotel Staff	53%	49%	41%	56%	60%	40%	57%	64%
	Tour Staff	42%	40%	55%	56%	47%	47%	39%	57%
	Local Ppl	18%	10%	5%	38%		20%	14%	14%
	Retail Staff	15%	19%	23%	6%	7%	33%	13%	14%
	Signs/ Advertisement	15%	10%	9%	19%	13%	7%	14%	14%
	Other	12%	13%	23%		20%	13%	10%	14%
	Local Publication	11%	13%	14%	6%	13%	13%	13%	14%
	Taxi Driver	10%	6%	5%	19%	7%	7%	8%	14%
	Other Visitors	6%	6%	14%		7%	7%	11%	14%
	Restaurant Staff	5%	4%	5%		7%		8%	
	Visitor Channel	4%	6%			13%		6%	7%
	GVB	1%	4%	5%	6%	7%		3%	
	Total	345	90	22	16	15	15	119	14

Prepared by QMark Research

# SOURCES OF INFORMATION

## TRIP INFLUENCERS



# SOURCES OF INFORMATION

## TRIP INFLUENCERS – KEY SEGMENTS

### GUAM VISITORS BUREAU - EXIT SURVEY

Q5C Please select the top 3 sources of information which motivated you to travel to Guam?

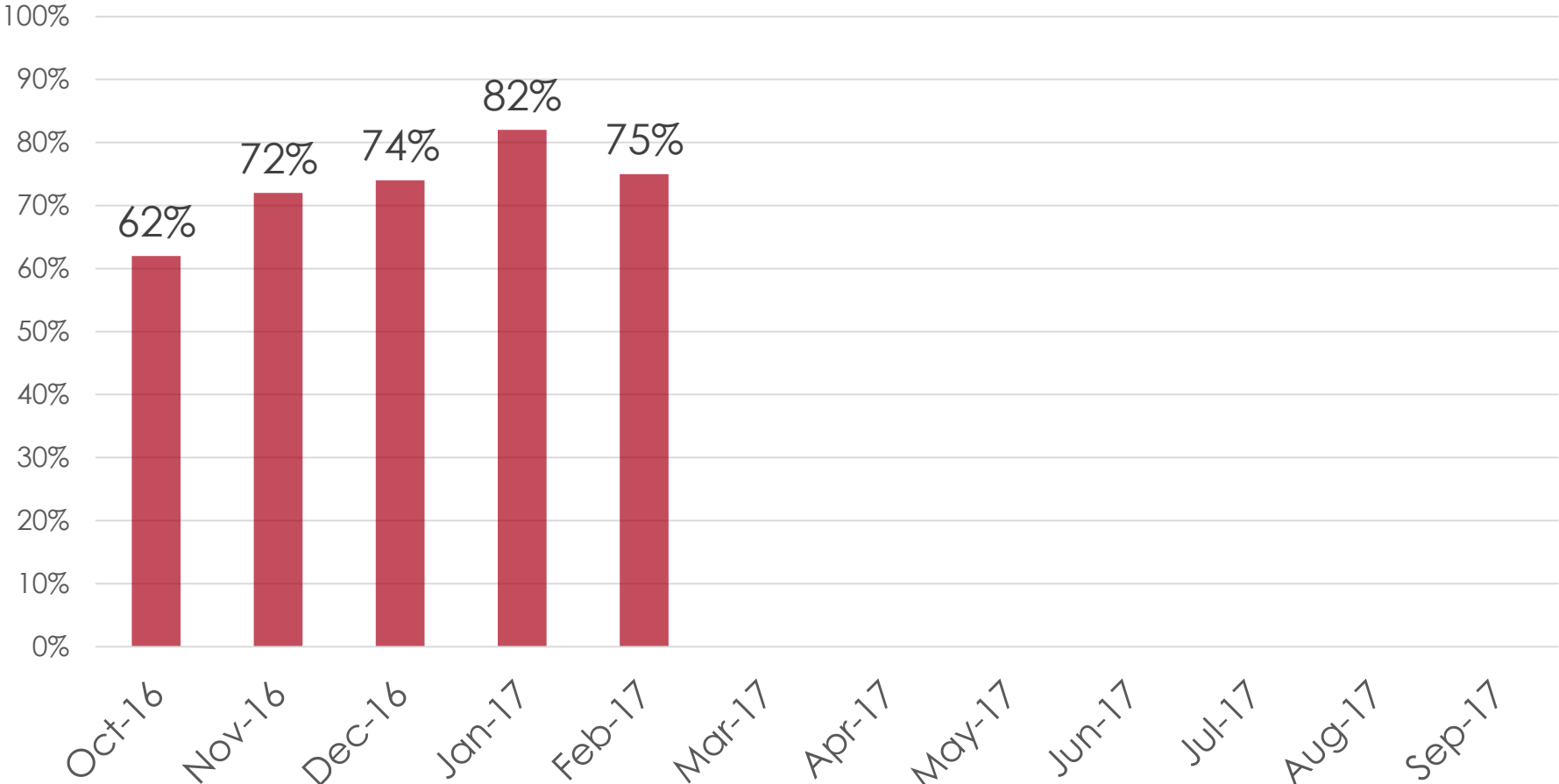
		TOTAL	FAMILY	OFFICE LADY/ SALARY	GROUP TRVL	SILVERS	WEDDING	REPEAT	MICE
		-	-	-	-	-	-	-	-
Q5C	Internet- Other Guam	52%	52%	55%	31%	40%	36%	48%	38%
	Travel Ag Brochure	40%	30%	36%	56%	27%	21%	23%	31%
	Recomm- friend	37%	13%	23%	38%	27%		24%	15%
	Guidebook- bookstore	27%	31%	32%	25%	13%	36%	16%	15%
	Prior trip	26%	42%	32%	6%	47%	21%	76%	38%
	Magazine article	20%	18%	23%	25%	33%	14%	12%	15%
	Advertisement	18%	14%	14%	19%	7%	7%	13%	15%
	Recomm- family/friends	13%	33%	5%	19%	27%	36%	17%	8%
	TV program	12%	4%	5%	19%		7%	11%	15%
	Other	7%	11%	5%	13%	7%	43%	7%	23%
	GVB Japan homepage	7%	7%	14%	13%	13%		8%	15%
	Recomm- Co-worker	5%	3%	14%	6%	7%		7%	23%
	GVB Promo activity	1%	1%					3%	
	Newspaper article	1%	1%					2%	
	Guam Fiesta Show	1%	1%				7%	1%	
	Miss Guam Promo	1%	1%		6%		7%	1%	
	Podcast	0%	1%				7%		
	Total	344	90	22	16	15	14	119	13

Prepared by QMark Research

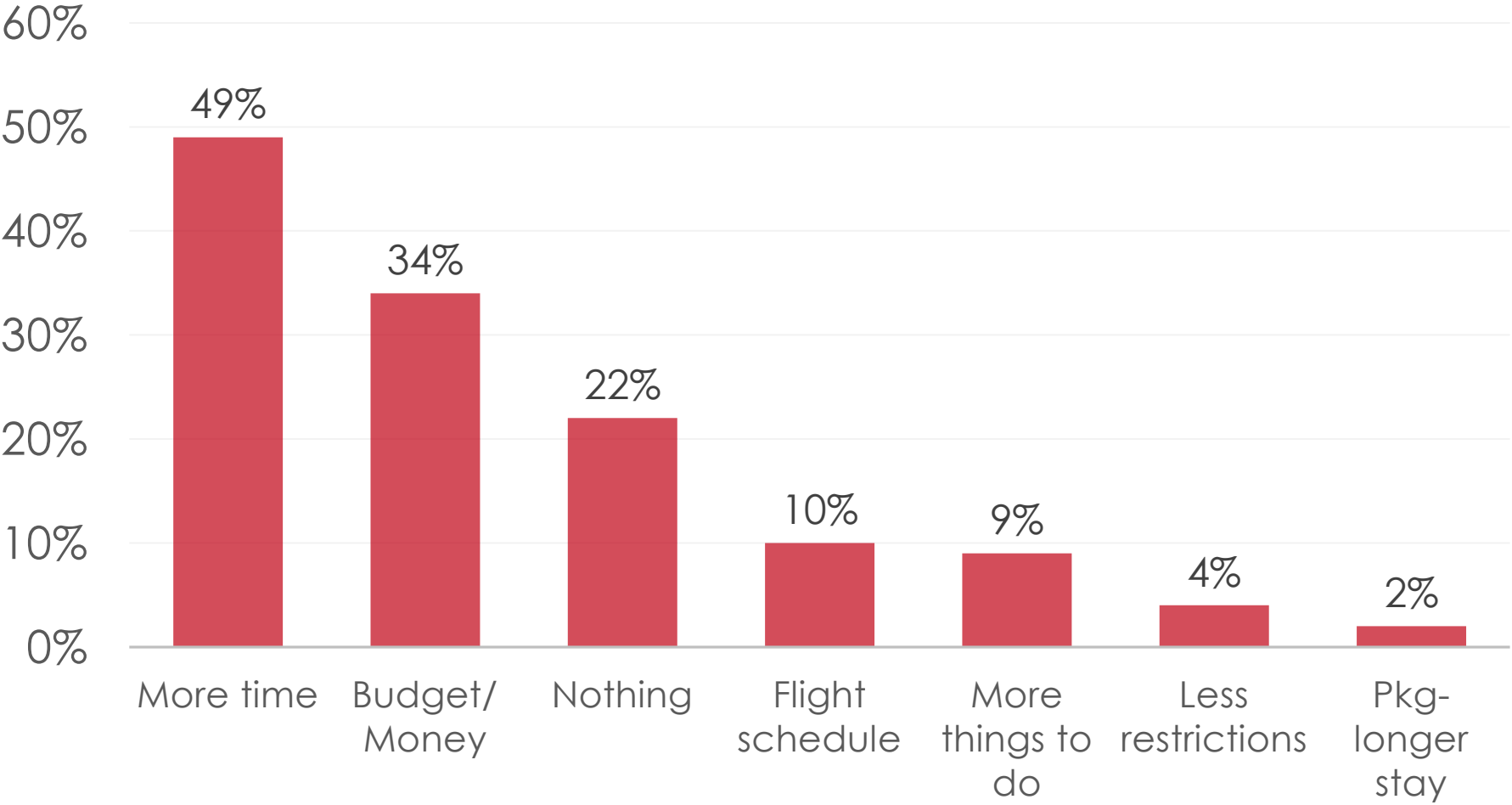
# SECTION 6

# FUTURE TRAVEL TO GUAM

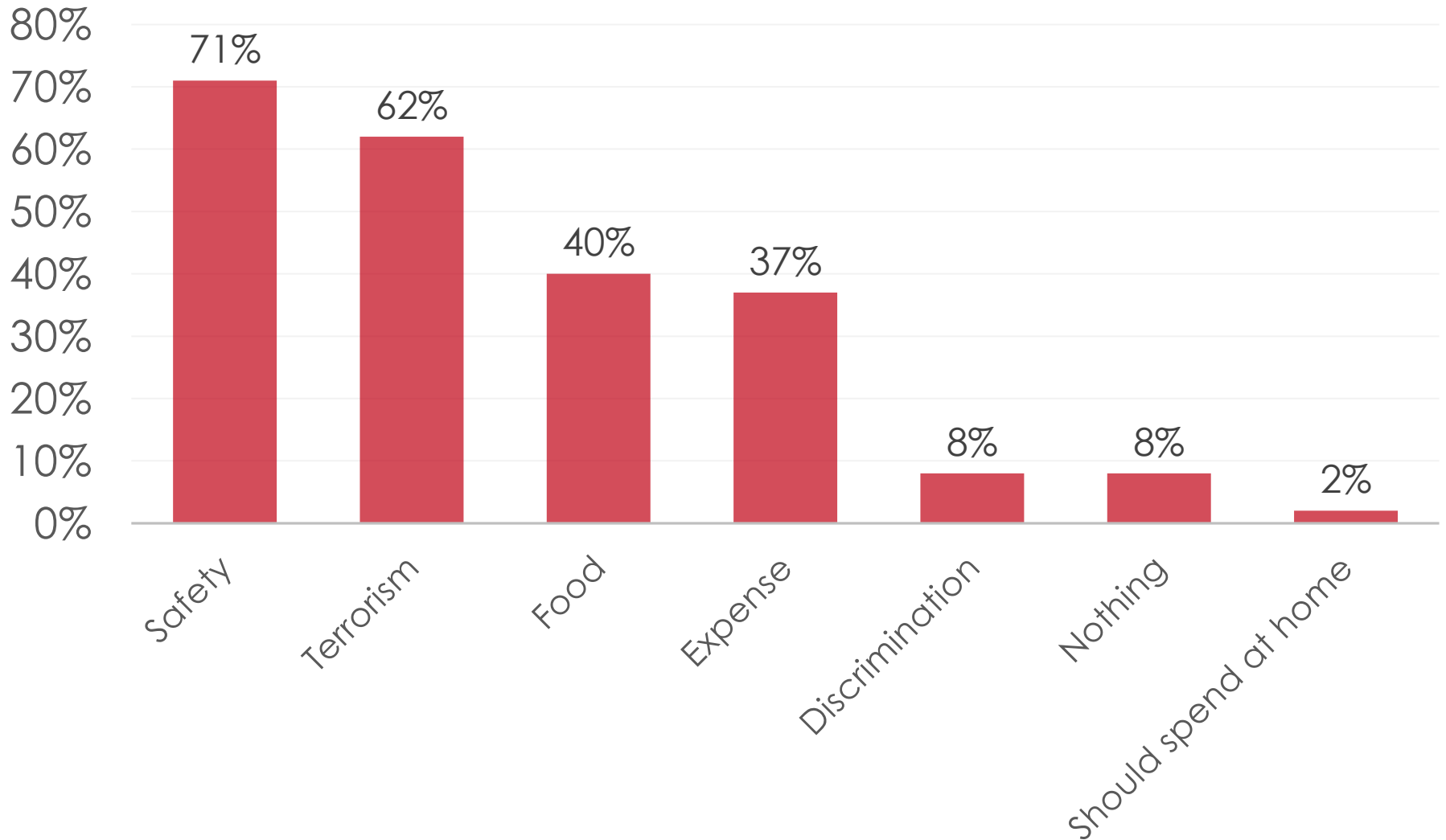
# Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



# FUTURE TRAVEL CONCERNS

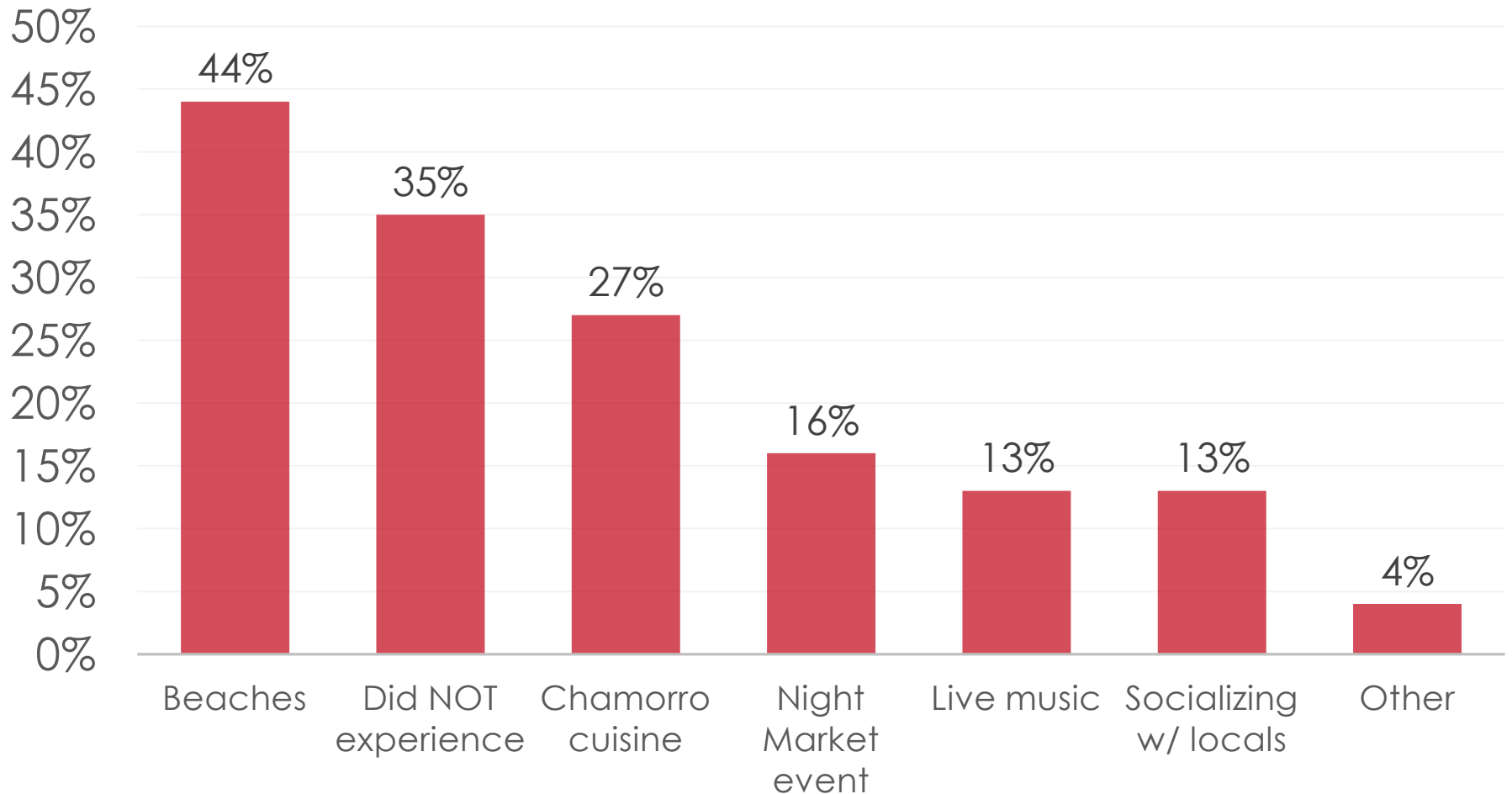


# SECTION 7

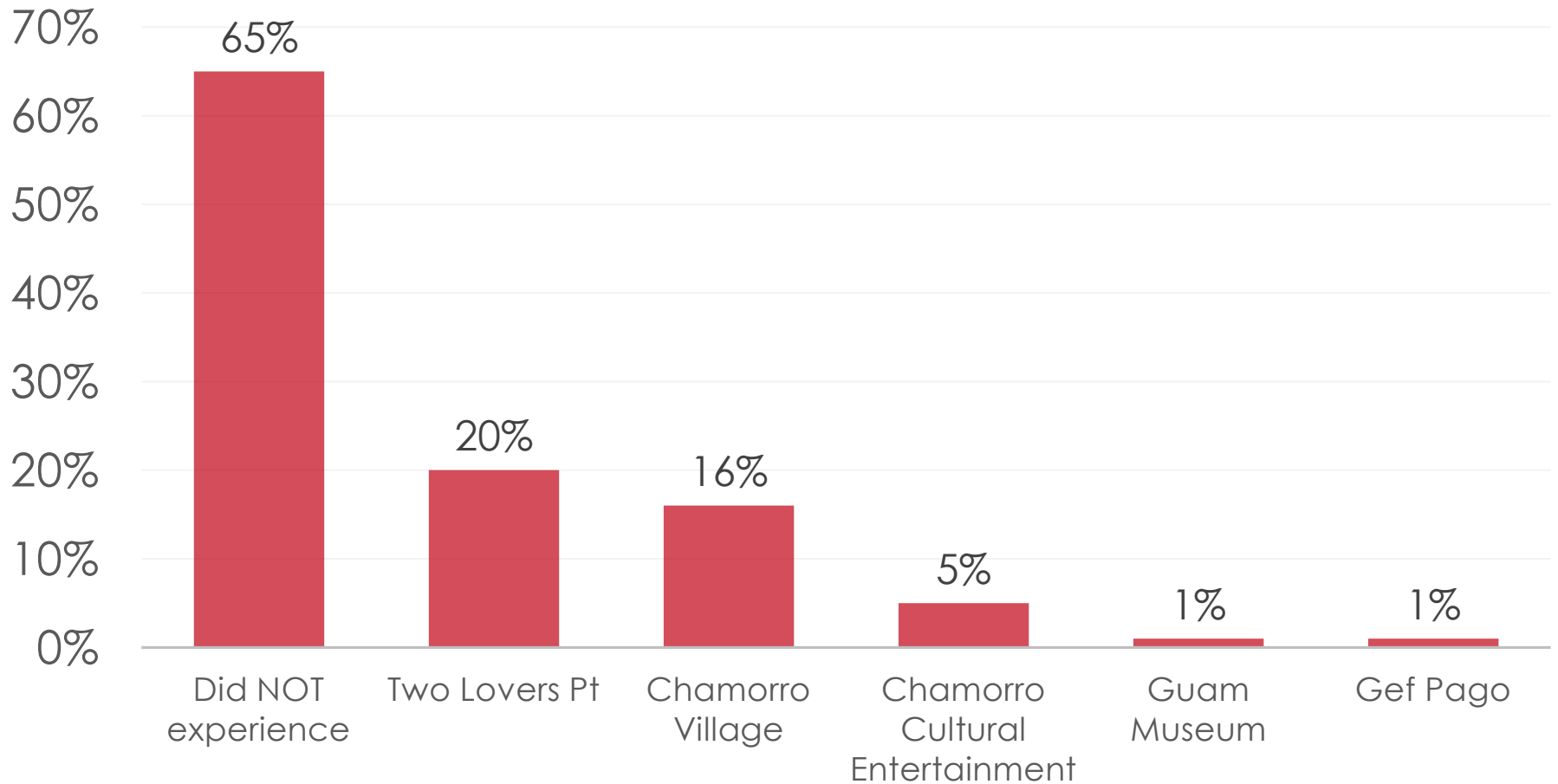
# GUAM CULTURE



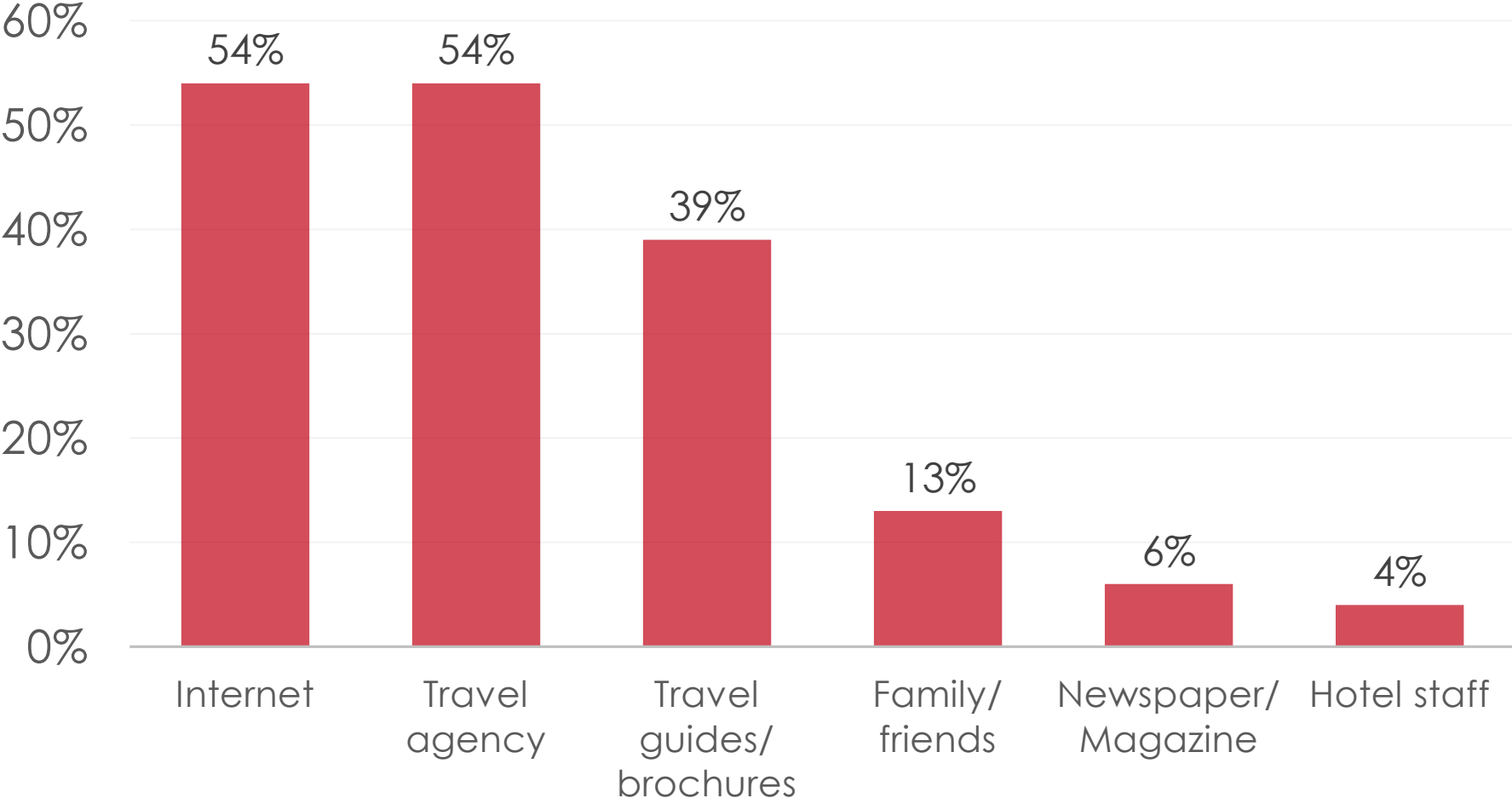
# EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT



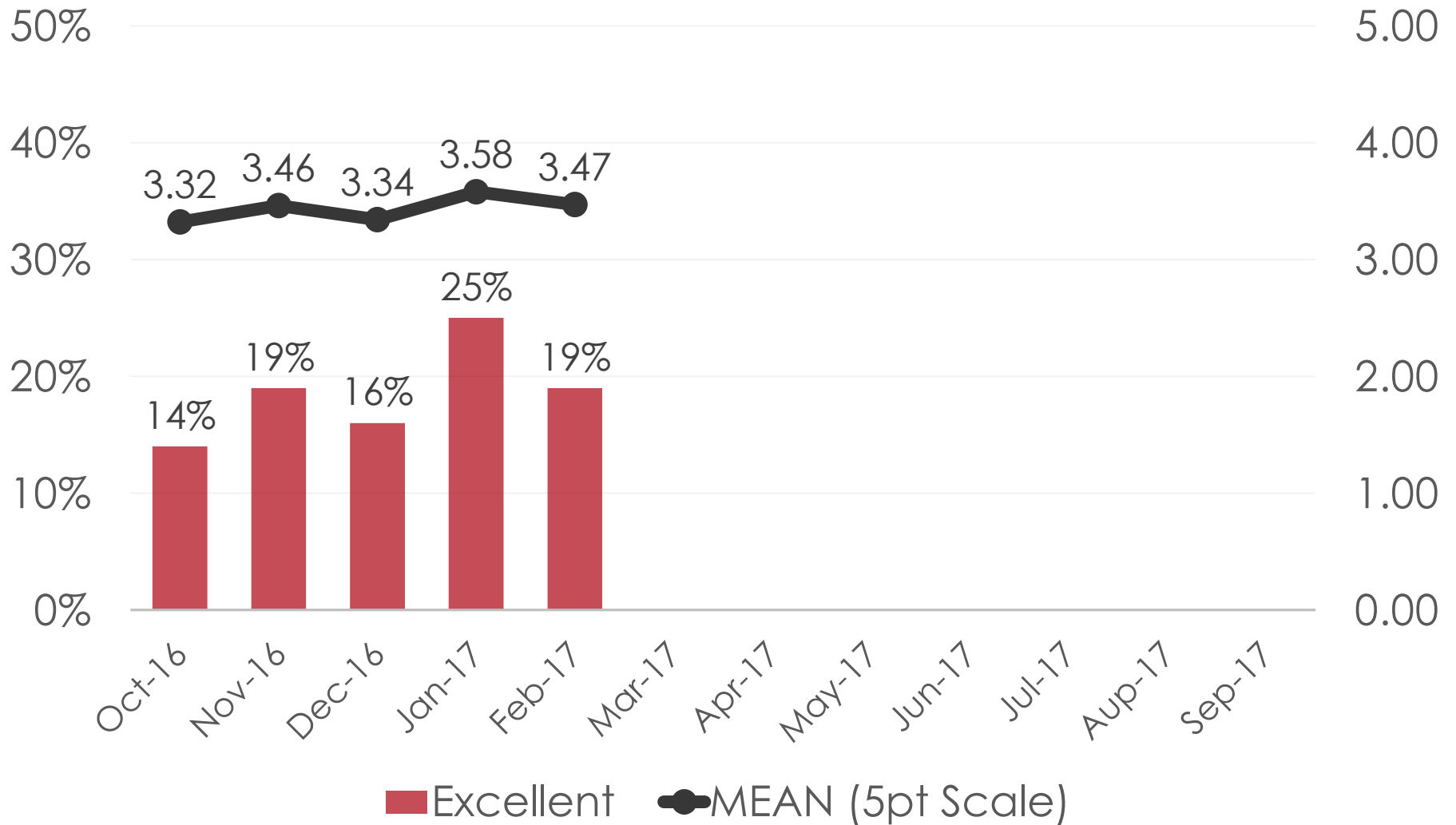
# EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



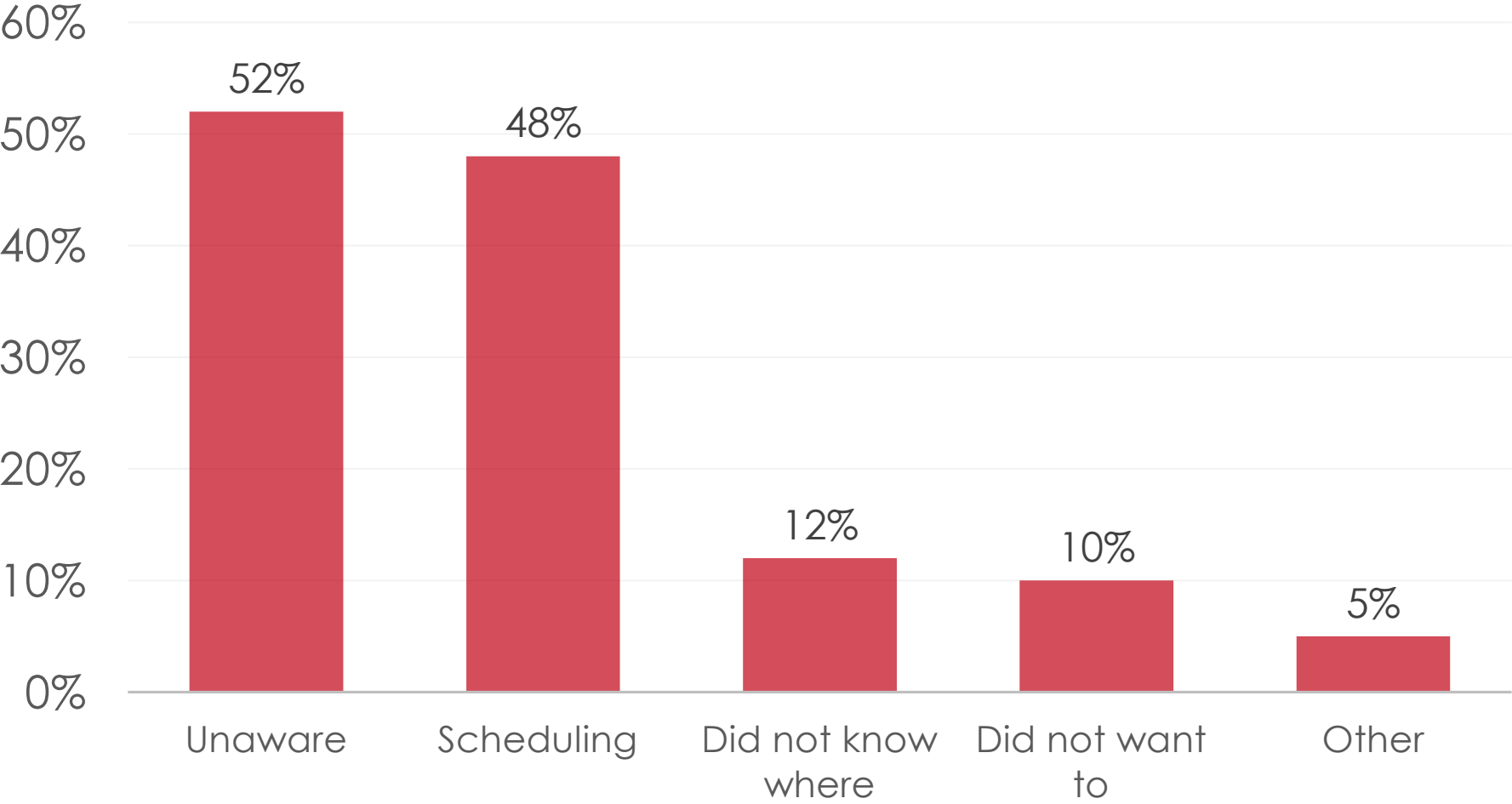
# SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



# SATISFACTION- CULTURAL ACTIVITY/EVENTS



# OBSTACLES- CULTURAL ACTIVITY/EVENTS



SECTION 7

ADVANCED STATISTICS

# Analysis Technique

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ( $p < .05$ ) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

# Drivers- Overall Satisfaction

Comparison of Drivers of Overall Satisfaction, Oct, Nov, Dec 2016, Jan, Feb 2017, and Overall Oct 2016 - Feb 2017						
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Combined Oct 2016 - Feb 2017
Drivers:	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks		4	5			6
Ease of getting around						
Safety walking around at night						
Quality of daytime tours			4		4	5
Variety of daytime tours						
Quality of nighttime tours						
Variety of nighttime tours						
Quality of shopping	2		2	3		
Variety of shopping		6			3	3
Price of things on Guam						
Quality of hotel accommodations	3	3		4	5	2
Quality/cleanliness of air, sky		5	3			7
Quality/cleanliness of parks						
Quality of landscape in Tumon		2			2	
Quality of landscape in Guam			1	1		1
Quality of ground handler	1	1				4
Quality/cleanliness of transportation vehicles	4			2	1	
% of Overall Satisfaction Accounted For	64.7%	55.2%	43.2%	41.1%	<b>43.4%</b>	45.6%

NOTE: Only significant drivers are included.



# Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japan visitor's experience on Guam is driven by five significant factors in the February 2017 Period. By rank order they are:
  - **Quality/cleanliness of transportation vehicles,**
  - **Quality of landscape in Tumon,**
  - **Variety of shopping,**
  - **Quality of day time tours, and**
  - **Quality of hotel accommodations.**
- With all five factors the overall  $r^2$  is .434 meaning that **43.4% of overall satisfaction is accounted for by these factors.**

# Drivers – On-Isle Expenditures

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2016, Jan, Feb 2017 and Overall Oct 2016-Feb 2017						
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Combined Oct 2016-Feb 2017
Drivers:	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks				1		4
Ease of getting around				3		
Safety walking around at night						
Quality of daytime tours						
Variety of daytime tours				4		
Quality of nighttime tours						
Variety of nighttime tours						
Quality of shopping	1					8
Variety of shopping						
Price of things on Guam		1				
Quality of hotel accommodations					2	3
Quality/cleanliness of air, sky						
Quality/cleanliness of parks						
Quality of landscape in Tumon				2		1
Quality of landscape in Guam						
Quality of ground handler				5		
Quality/cleanliness of transportation vehicles					1	2
% of Per Person On Island Expenditures Accounted For	2.7%	1.8%	0.0%	10.0%	5.6%	2.0%
NOTE: Only significant drivers are included.						

# Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Japan visitors on Guam is driven by two significant factors in the February 2017 period. By rank order they are:
  - **Quality/cleanliness of transportation vehicles, and**
  - **Quality of hotel accommodations.**
- With both factors the overall  $r^2$  is .056 meaning that **5.6% of Per Person On Island Expenditure is accounted for by these factors.**