

Guam Visitors Bureau

Korean Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

FEBRUARY 2017

Prepared by: Anthology Research

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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 **350** 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 **350** is +/- 5.23 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 +/- 5.23 percentage points.

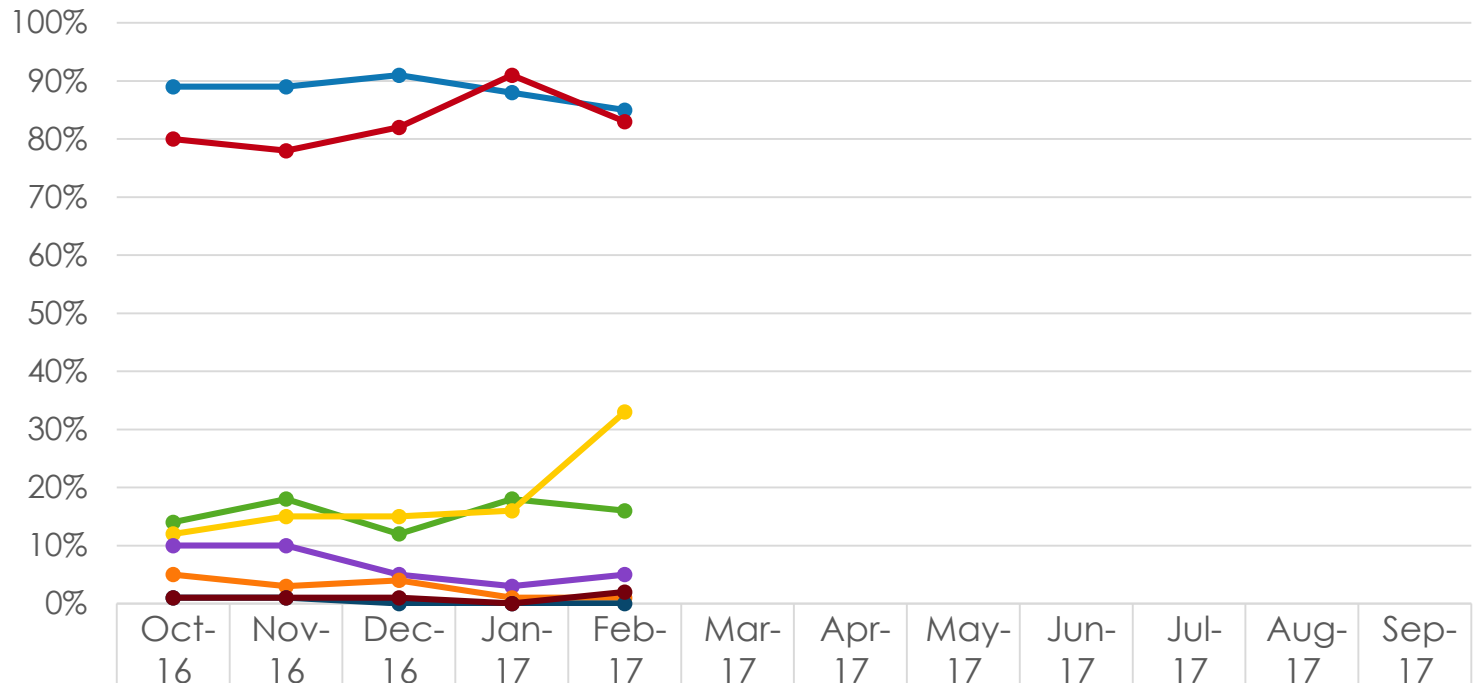
Objectives

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

Key Highlighted Segments

- **The specific objectives were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - Families (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

Key Highlighted Segments

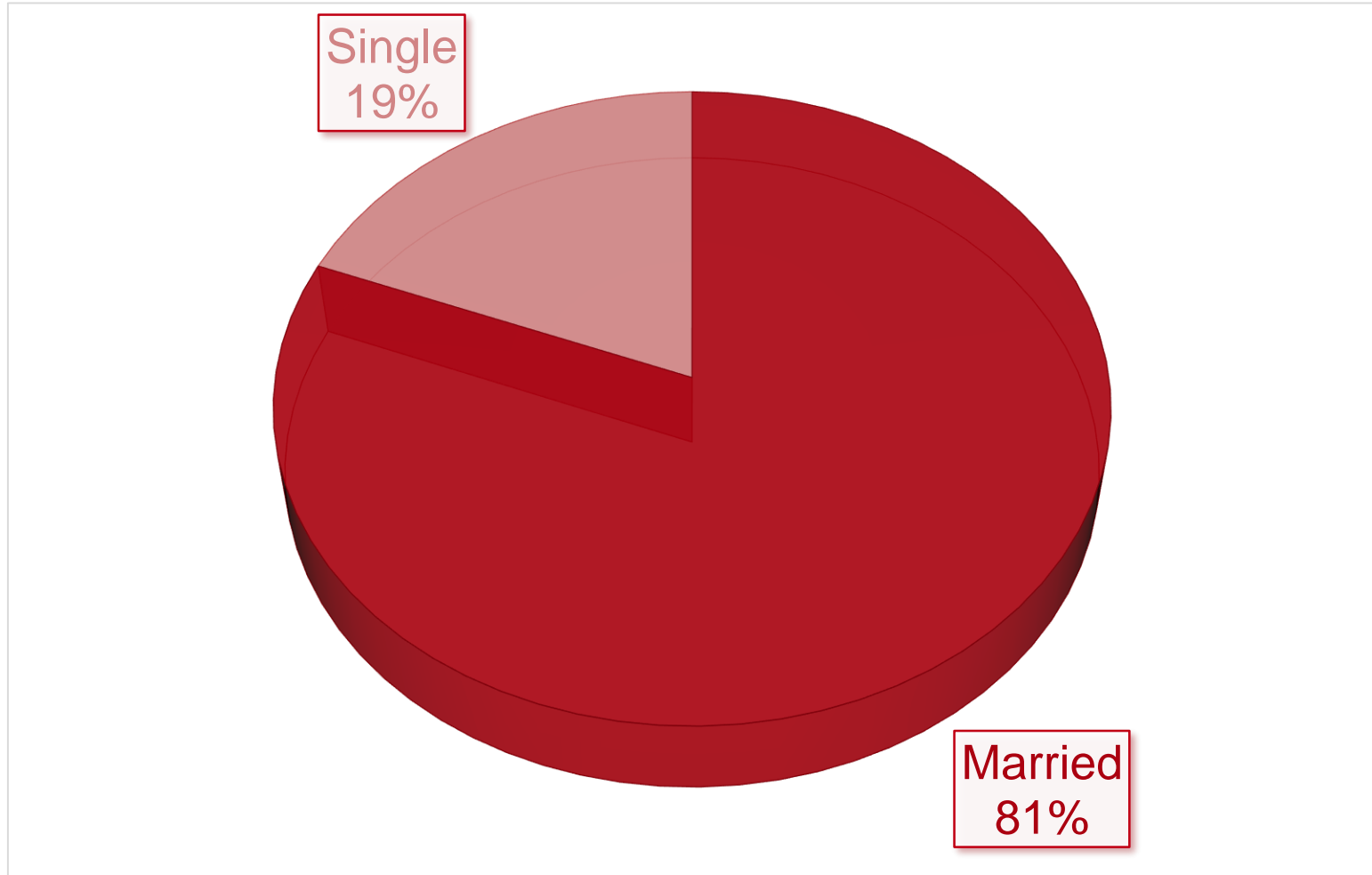


| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Leisure Traveler | 89% | 89% | 91% | 88% | 85% | | | | | | | |
| Family | 80% | 78% | 82% | 91% | 83% | | | | | | | |
| Repeat | 14% | 18% | 12% | 18% | 16% | | | | | | | |
| FIT | 12% | 15% | 15% | 16% | 33% | | | | | | | |
| Honey-moon | 10% | 10% | 5% | 3% | 5% | | | | | | | |
| MICE | 5% | 3% | 4% | 1% | 1% | | | | | | | |
| Wedding | 1% | 1% | 0% | 0% | 0% | | | | | | | |
| Group | 1% | 1% | 1% | 0% | 2% | | | | | | | |

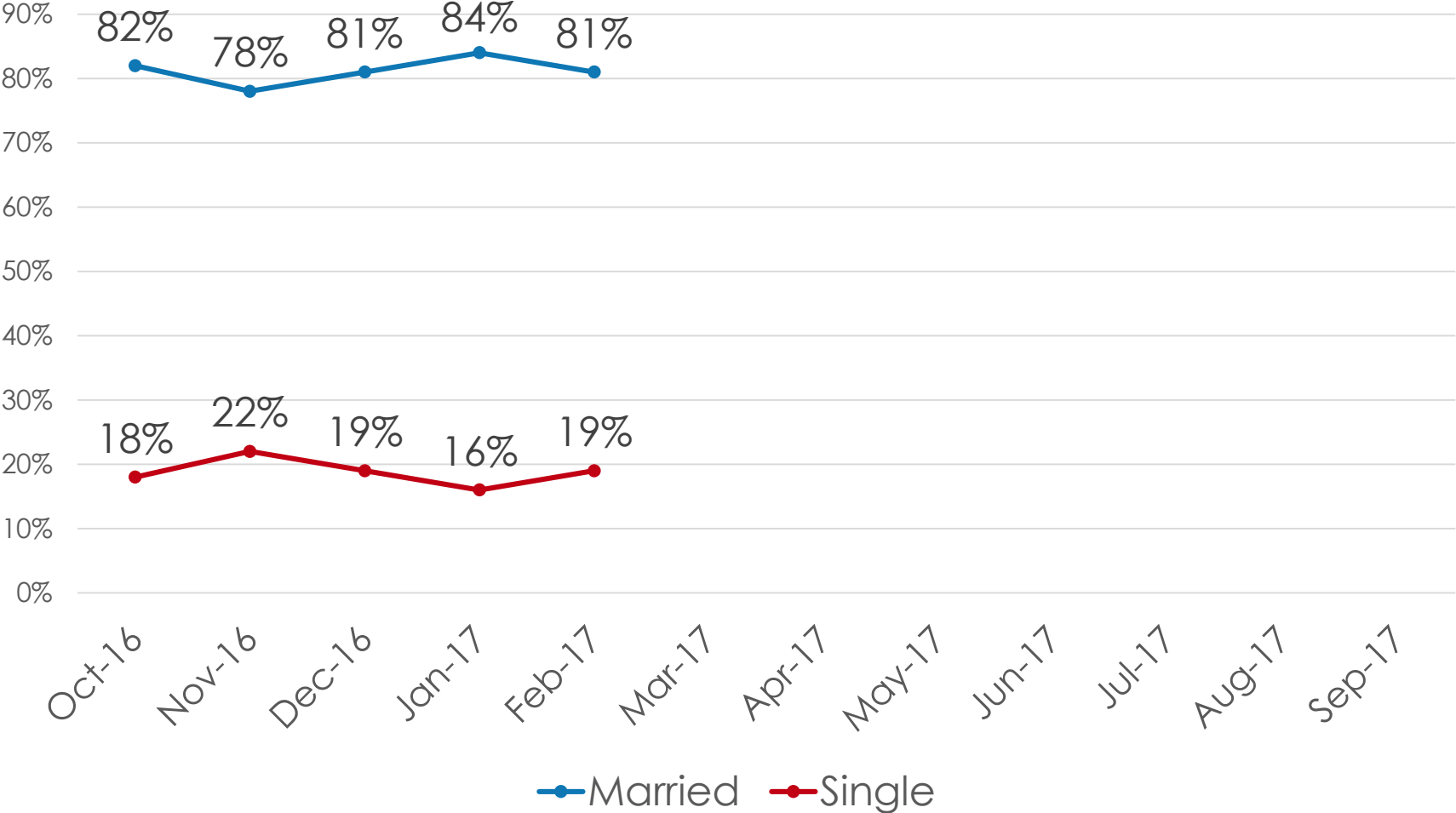
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2017 Tracking



Marital status – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

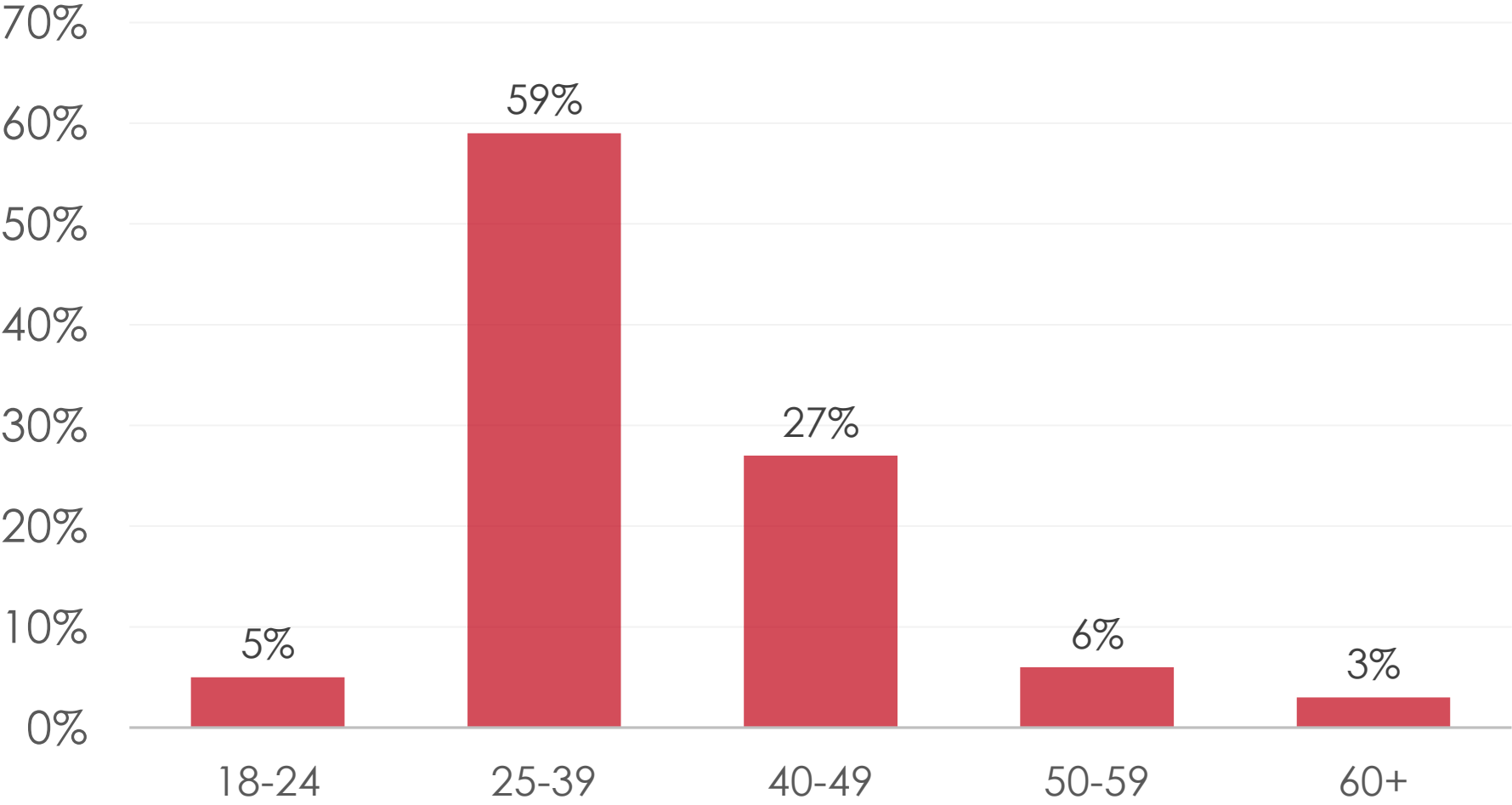
QE Are you married or single?

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|----|---------|-------|-----|------|------------|---------|------------------|--------|------------|----------------|
| | | - | - | - | - | - | - | - | - | - |
| QE | Married | 81% | 77% | 100% | 100% | 100% | 81% | 89% | 100% | 82% |
| | Single | 19% | 23% | | | | 19% | 11% | | 18% |
| | Total | 350 | 117 | 3 | 17 | 1 | 298 | 290 | 8 | 56 |

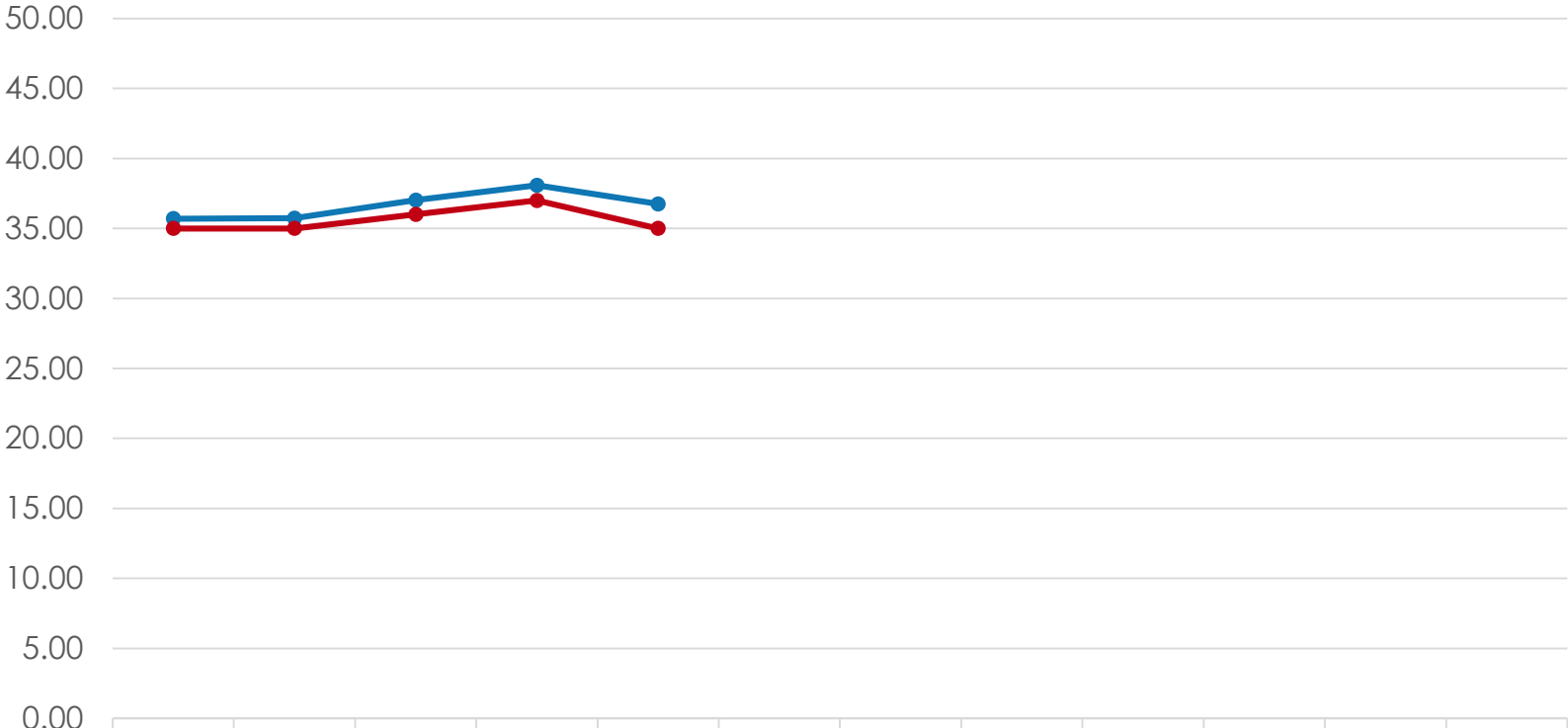
Prepared by QMark Research

Age

MEAN = 36.75
MEDIAN = 35



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 | 35.70 | 35.73 | 37.02 | 38.08 | 36.75 | | | | | | | |
| MEDIAN | 35 | 35 | 36 | 37 | 35 | | | | | | | |

Age – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

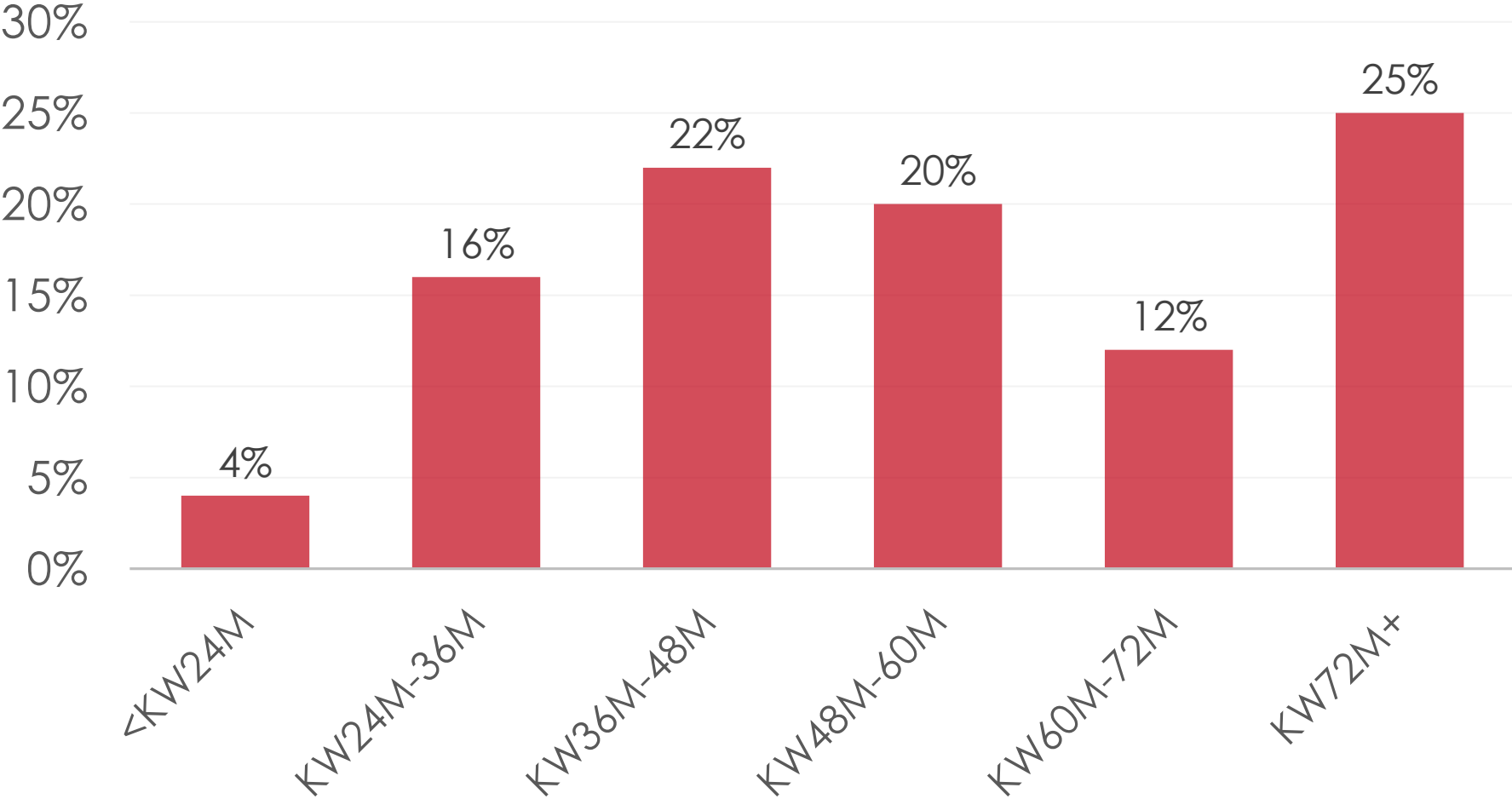
QF And what was your age on your last birthday?

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|----|--------|-------|-------|-------|------------|---------|------------------|--------|------------|----------------|
| | | - | - | - | - | - | - | - | - | - |
| QF | 18-24 | 5% | 8% | | 6% | | 5% | 3% | | 2% |
| | 25-39 | 59% | 70% | 67% | 94% | 100% | 57% | 61% | 13% | 57% |
| | 40-49 | 27% | 16% | 33% | | | 29% | 29% | 50% | 30% |
| | 50-59 | 6% | 2% | | | | 6% | 4% | 38% | 4% |
| | 60+ | 3% | 4% | | | | 3% | 2% | | 7% |
| | Total | 350 | 117 | 3 | 17 | 1 | 298 | 290 | 8 | 56 |
| QF | Mean | 36.75 | 34.81 | 35.33 | 29.76 | 36.00 | 37.13 | 37.00 | 45.63 | 38.05 |
| | Median | 35 | 33 | 36 | 30 | 36 | 36 | 36 | 47 | 36 |

Prepared by QMark Research

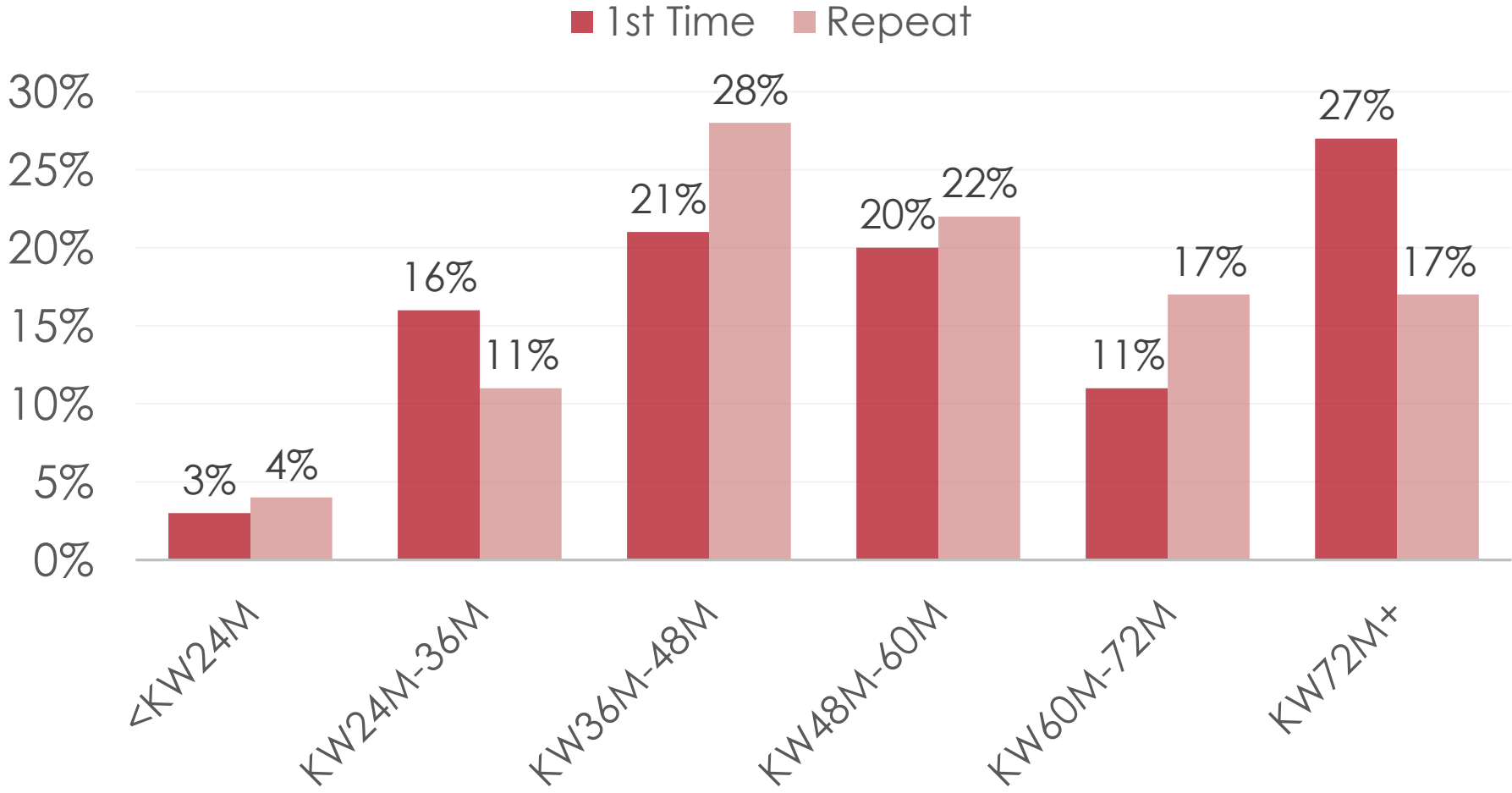
Annual Household Income

EXCHANGE RATE KW1,138.65=\$1



Annual Household Income

EXCHANGE RATE KW1,179.57=\$1



Annual Household Income – Key Segments

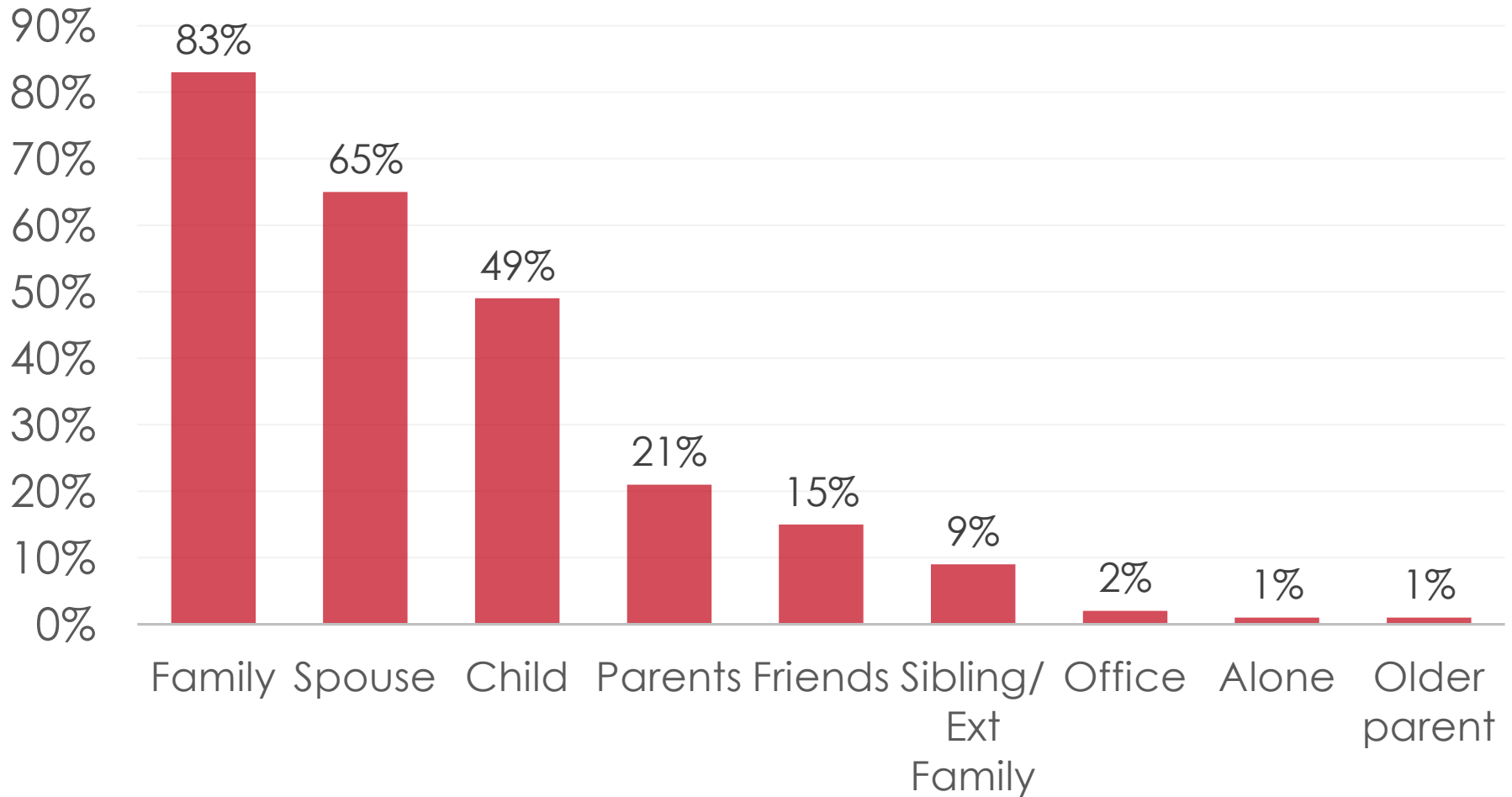
GUAM VISITORS BUREAU - EXIT SURVEY

Q26 What is your approximate annual household income before taxes?

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|-----|-----------------|-------|-----|------|------------|---------|------------------|--------|------------|----------------|
| | | - | - | - | - | - | - | - | - | - |
| Q26 | <KW12.0M | 1% | 1% | | | | 1% | 0% | | 2% |
| | KW12.0M-KW24.0M | 3% | 3% | | 7% | | 3% | 2% | | 2% |
| | KW24.0M-KW36.0M | 16% | 15% | | 47% | | 16% | 14% | 29% | 11% |
| | KW36.0M-KW48.0M | 22% | 26% | 67% | 40% | 100% | 21% | 23% | | 28% |
| | KW48.0M-KW60.0M | 20% | 17% | | 7% | | 21% | 22% | | 22% |
| | KW60.0M-KW72.0M | 12% | 14% | 33% | | | 11% | 12% | 29% | 17% |
| | KW72.0M+ | 25% | 23% | | | | 25% | 25% | 43% | 17% |
| | No Income | 1% | 2% | | | | 2% | 1% | | |
| | Total | 308 | 102 | 3 | 15 | 1 | 262 | 258 | 7 | 46 |

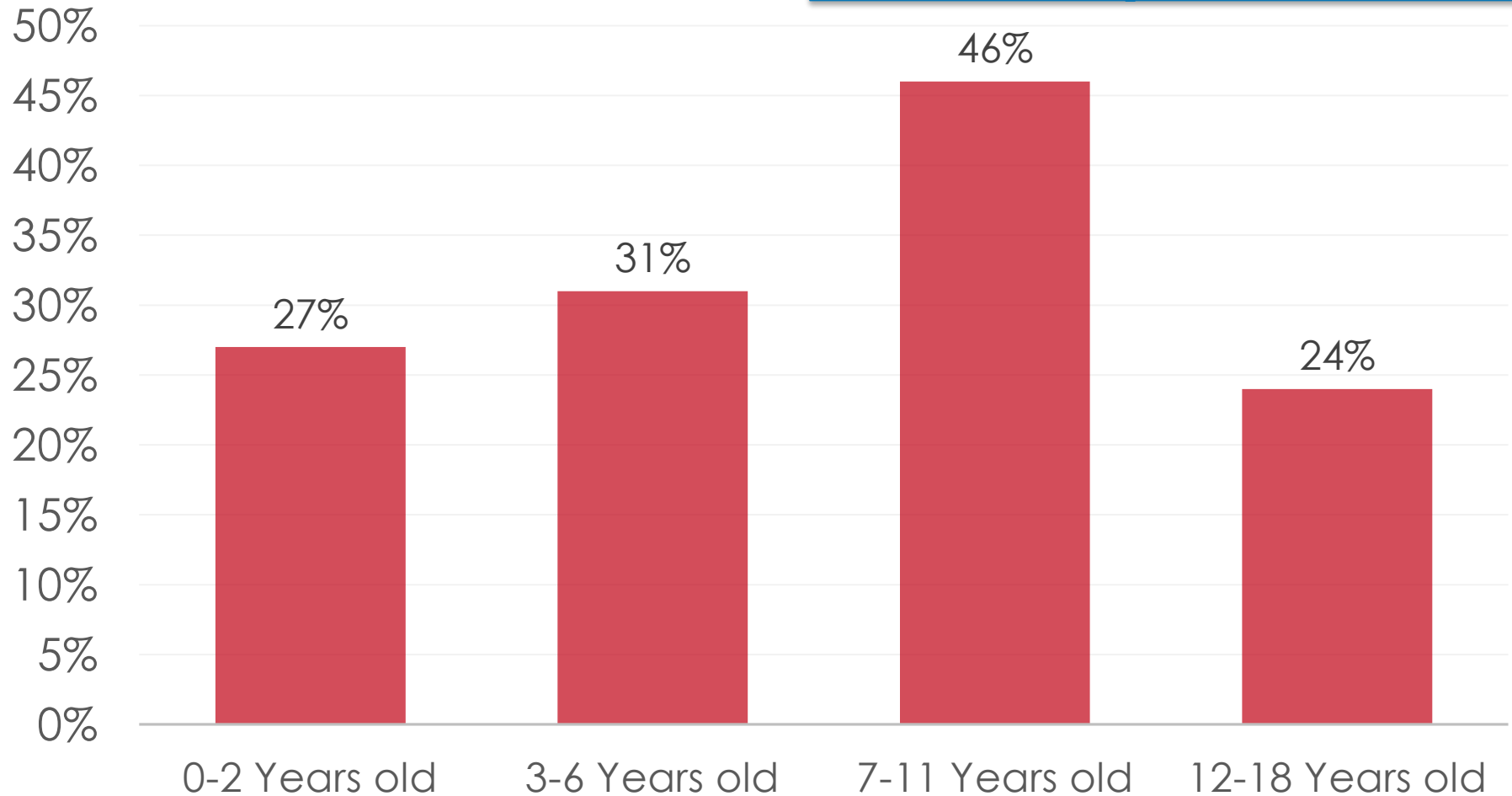
Prepared by QMark Research

Travel Party

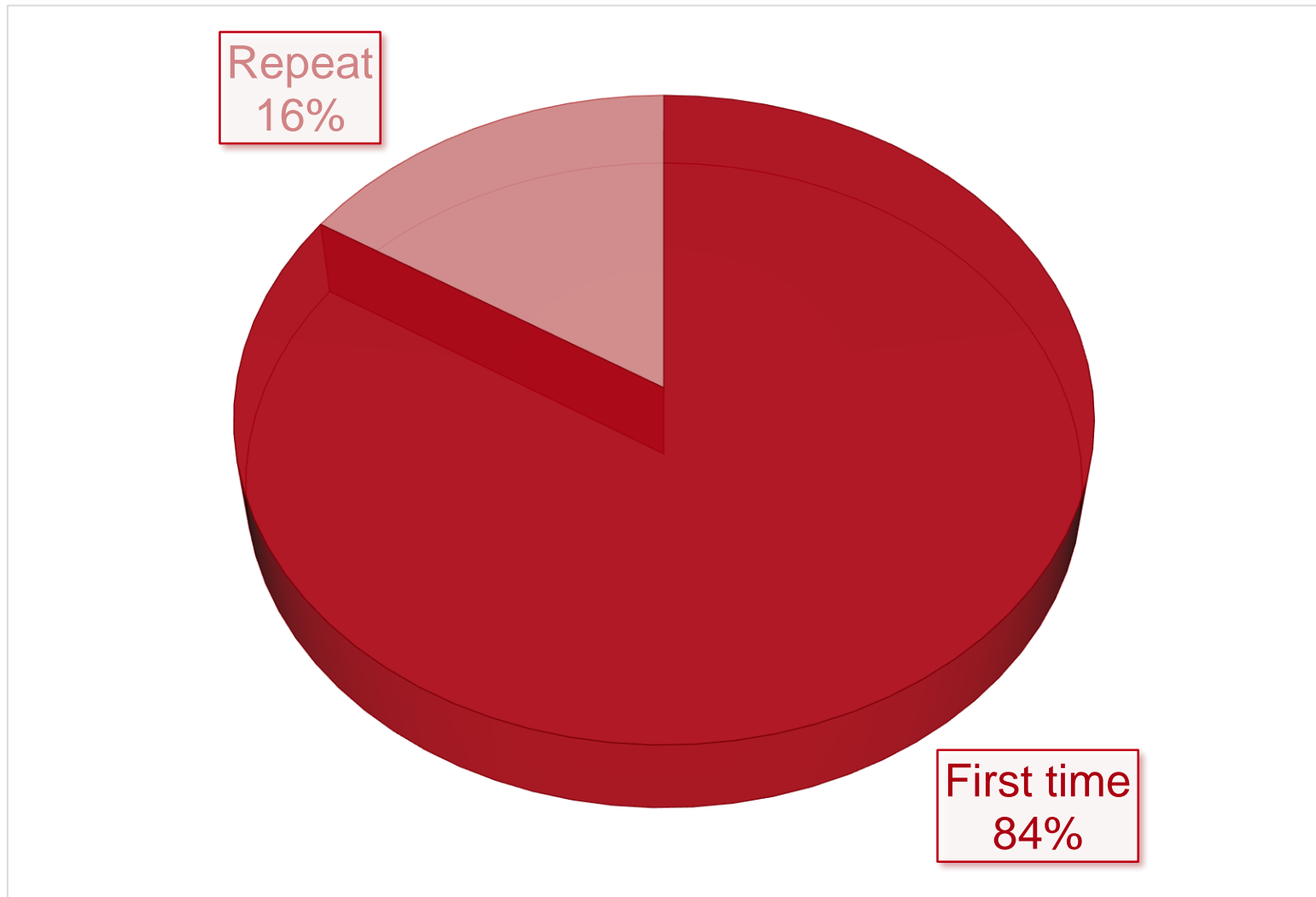


Travel Party - Children

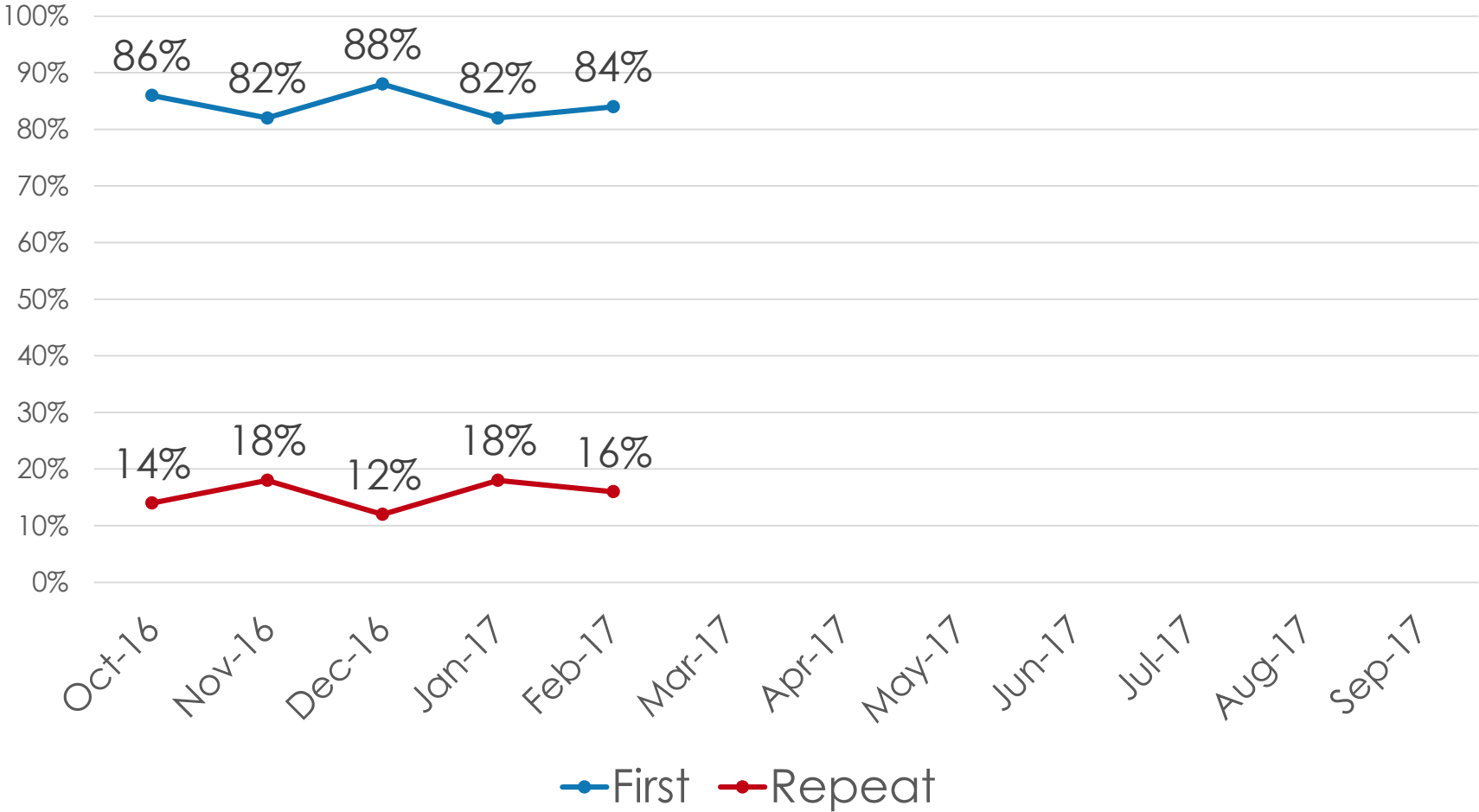
N = 173
49% TRAVELING WITH A CHILD



Trips to Guam



Trips to Guam – FY2017 Tracking



Trips to Guam – Key Segments

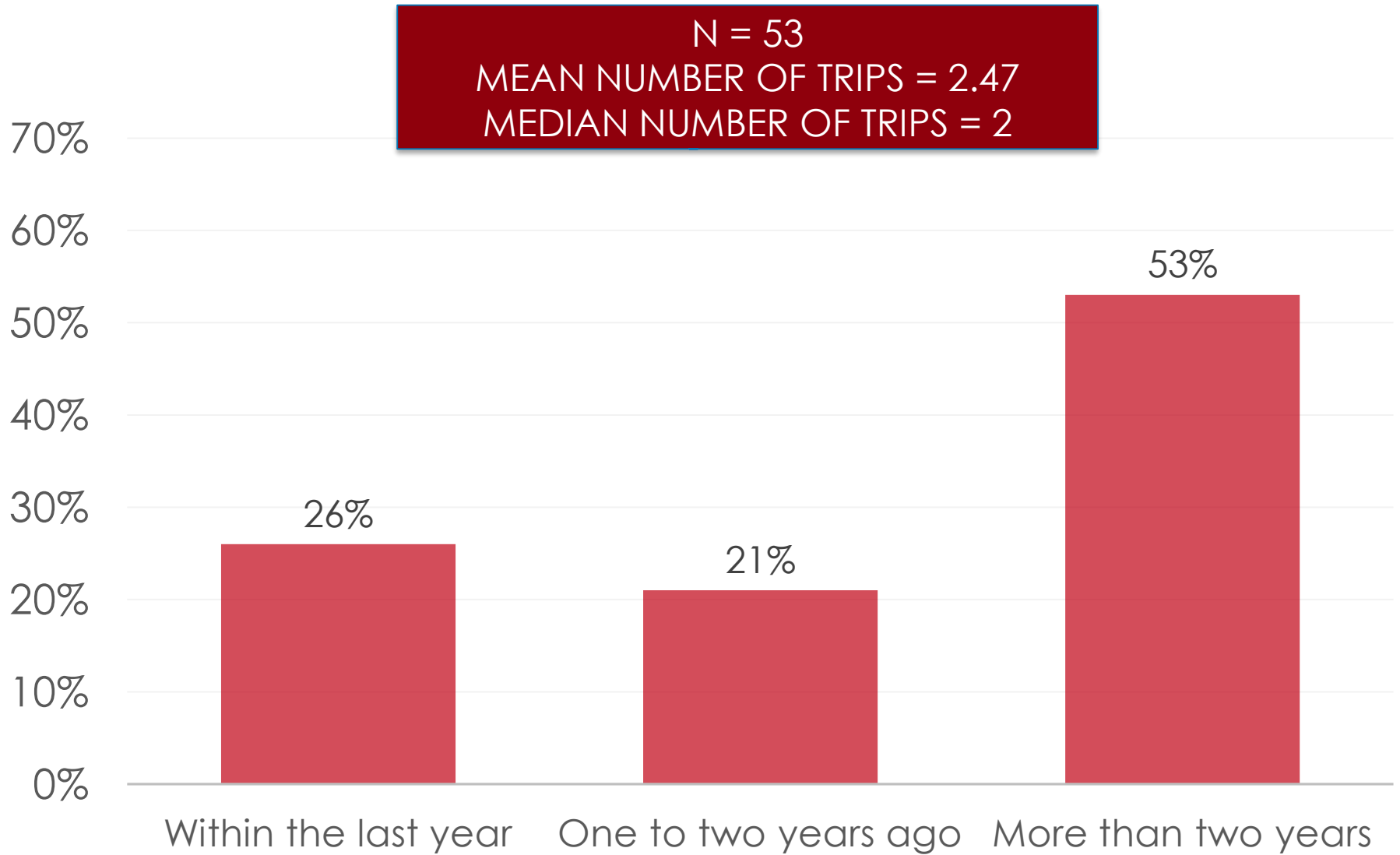
GUAM VISITORS BUREAU - EXIT SURVEY

Q3A Is this your first trip to Guam?

| | | TOTAL | FIT | MICE | HONEY- MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|-----|-------|-------|-----|------|----------------|---------|---------------------|--------|---------------|-------------------|
| | | - | - | - | - | - | - | - | - | - |
| Q3A | Yes | 84% | 81% | 67% | 94% | 100% | 86% | 84% | 75% | |
| | No | 16% | 19% | 33% | 6% | | 14% | 16% | 25% | 100% |
| | Total | 349 | 117 | 3 | 17 | 1 | 297 | 289 | 8 | 56 |

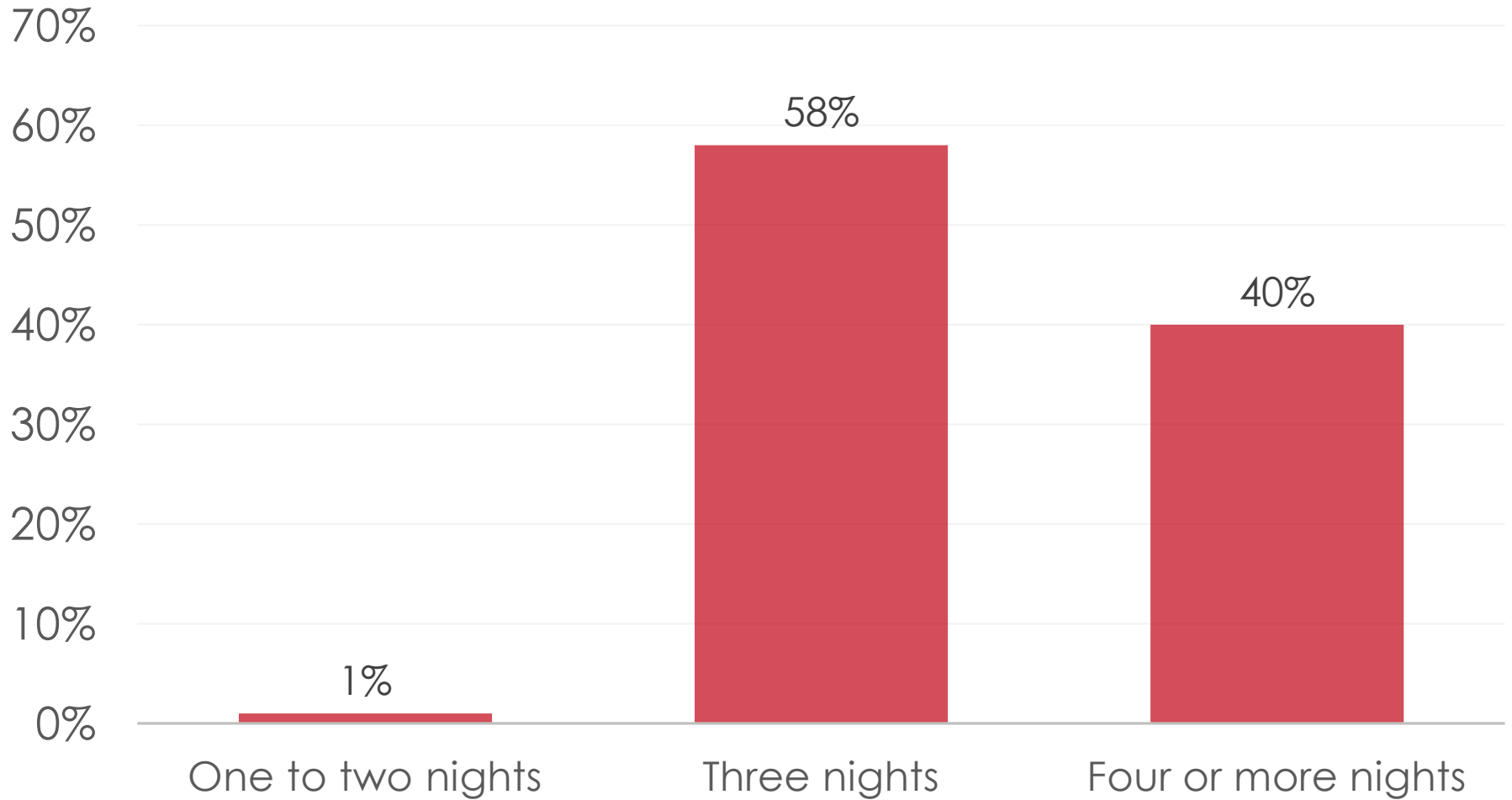
Prepared by QMark Research

Repeat Visitor- Most Recent Trip

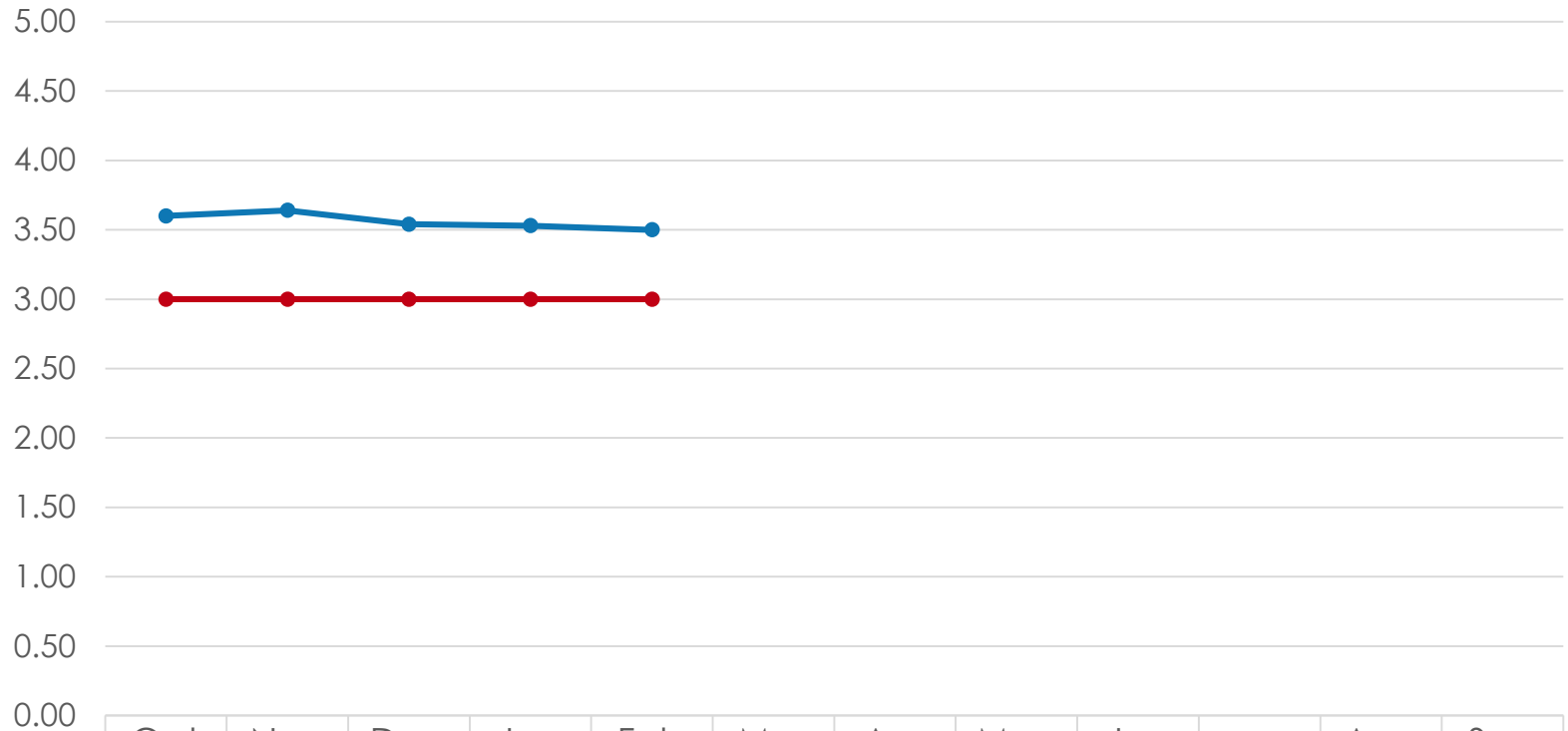


Length of Stay

MEAN NUMBER OF NIGHTS = 3.50
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 | 3.60 | 3.64 | 3.54 | 3.53 | 3.50 | | | | | | | |
| 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 | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|----|--------|-------|------|------|------------|---------|------------------|--------|------------|----------------|
| | | - | - | - | - | - | - | - | - | - |
| Q8 | 1-2 | 1% | 2% | | | | 0% | 0% | | 5% |
| | 3 | 58% | 49% | 50% | 29% | | 61% | 56% | 100% | 47% |
| | 4+ | 40% | 49% | 50% | 71% | | 39% | 43% | | 47% |
| | Total | 344 | 112 | 2 | 17 | | 294 | 284 | 8 | 55 |
| Q8 | Mean | 3.50 | 3.67 | 4.00 | 3.82 | . | 3.49 | 3.56 | 3.00 | 3.58 |
| | Median | 3 | 3 | 4 | 4 | . | 3 | 3 | 3 | 3 |

Prepared by QMark Research

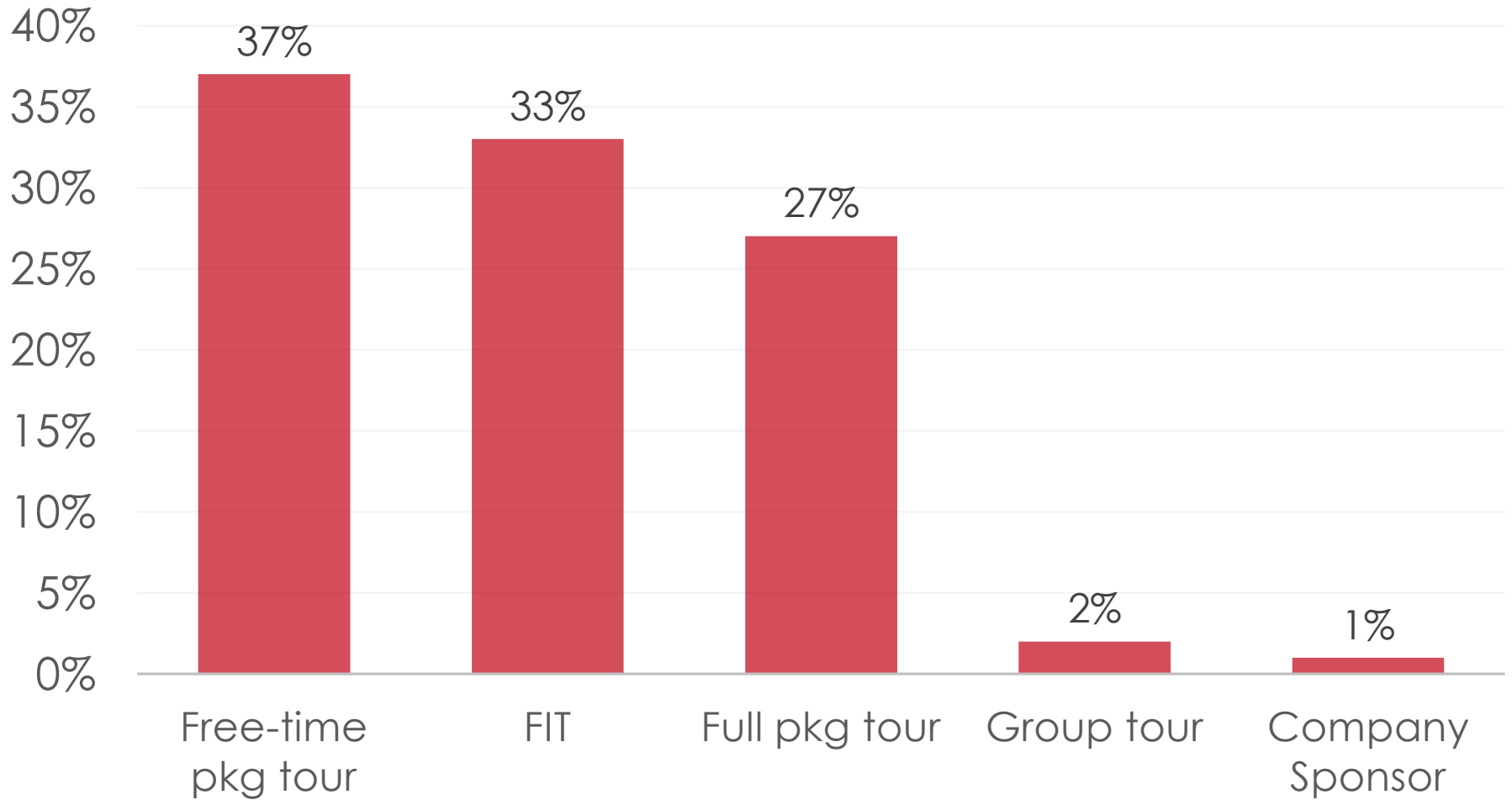
Occupation – Top Responses (10%+)



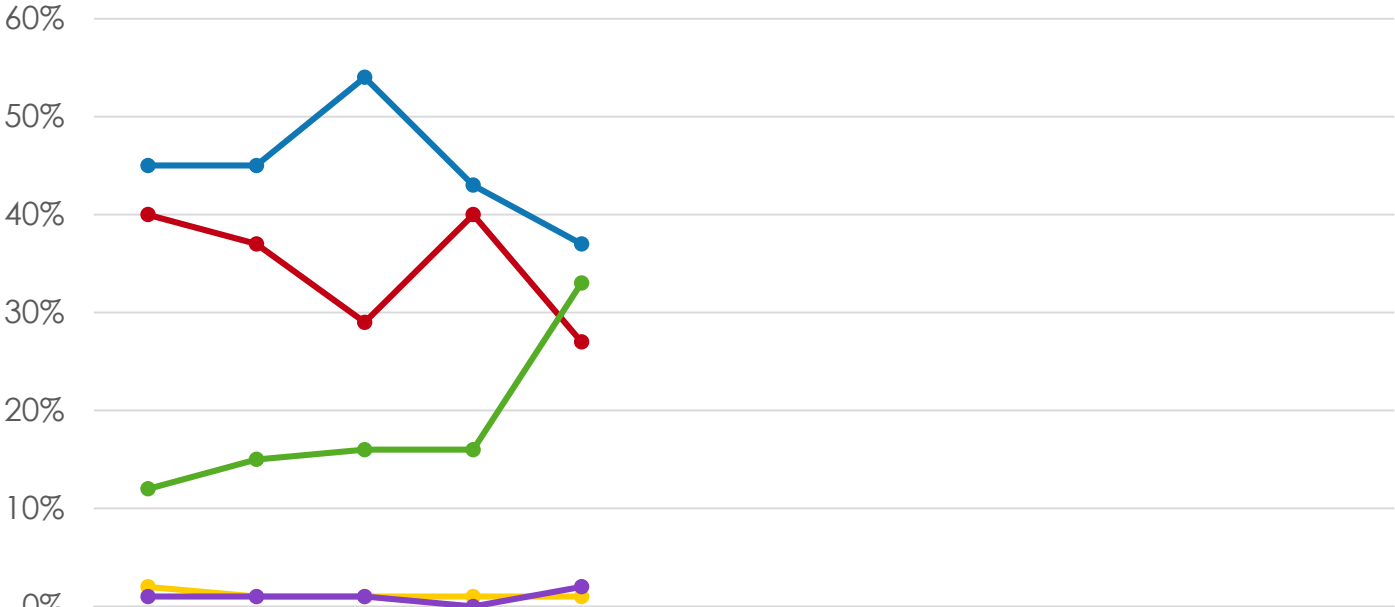
SECTION 2

TRAVEL PLANNING

Travel Planning



Travel Planning – 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 |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Free-time pkg tour | 45% | 45% | 54% | 43% | 37% | | | | | | | |
| Full pkg tour | 40% | 37% | 29% | 40% | 27% | | | | | | | |
| FIT | 12% | 15% | 16% | 16% | 33% | | | | | | | |
| Company | 2% | 1% | 1% | 1% | 1% | | | | | | | |
| Group | 1% | 1% | 1% | 0% | 2% | | | | | | | |

Travel Planning – Key Segments

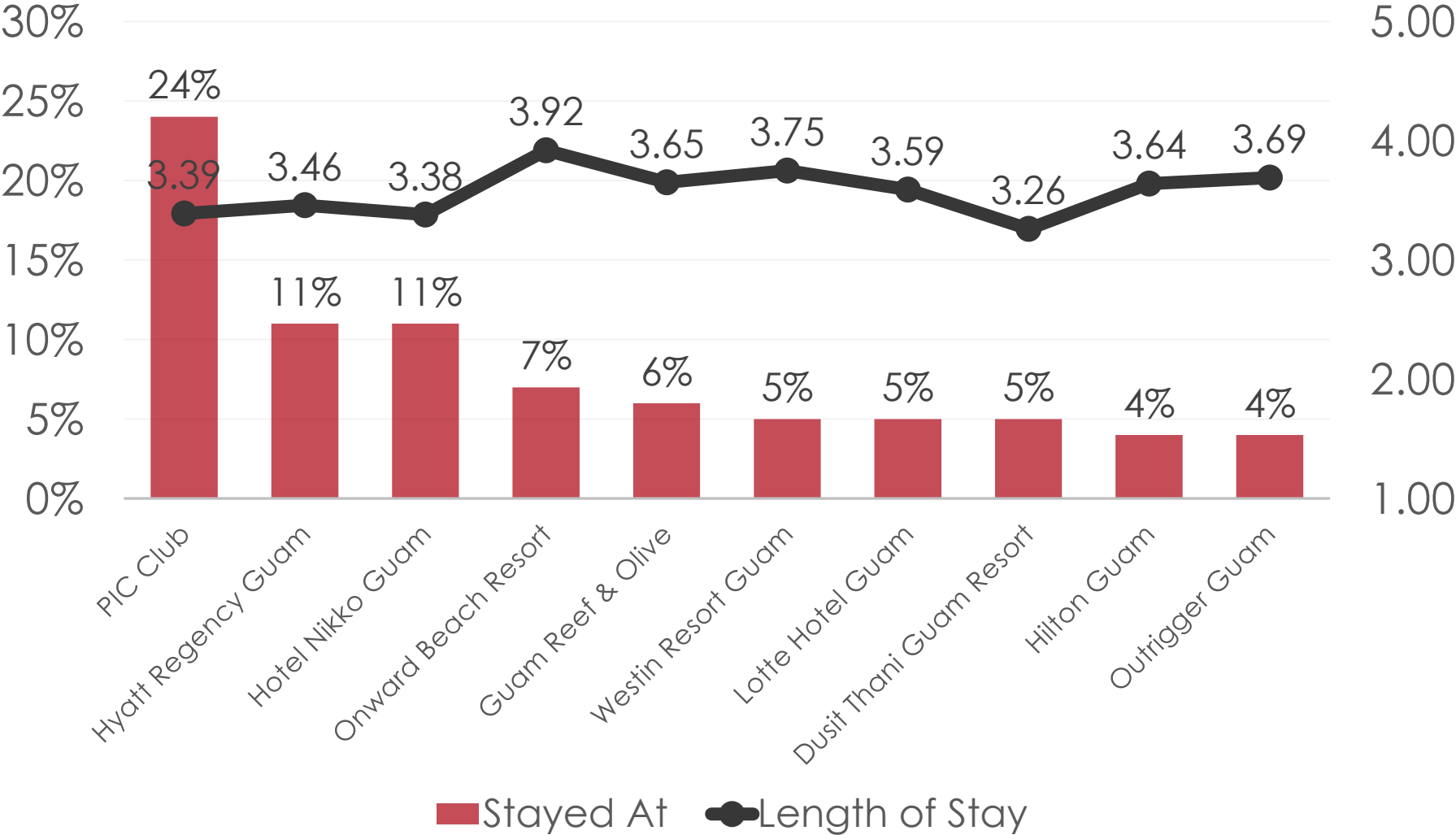
GUAM VISITORS BUREAU - EXIT SURVEY

Q7 Please describe your travel arrangements to Guam?

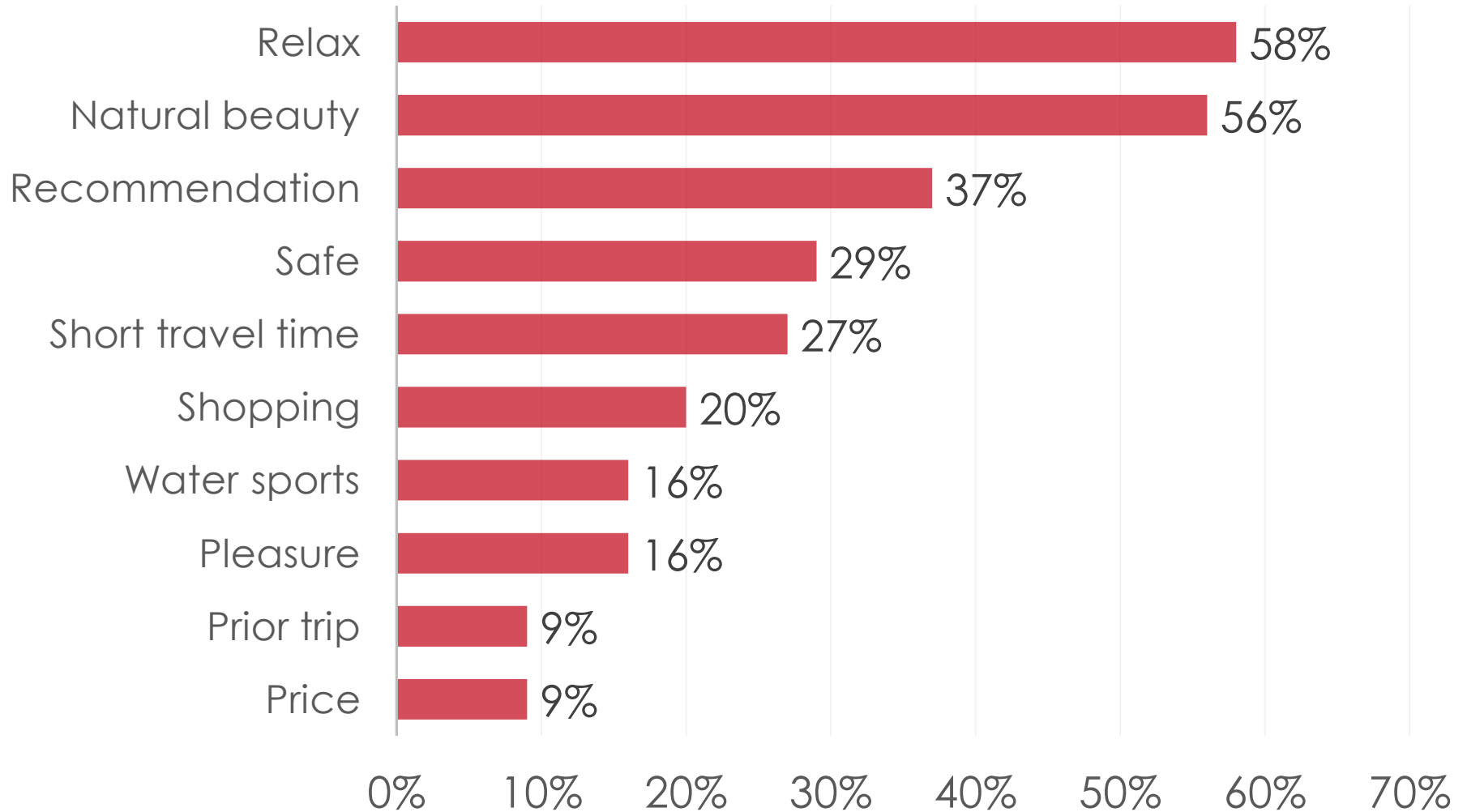
| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|----|------------------------------------|-------|------|------|------------|---------|------------------|--------|------------|----------------|
| | | - | - | - | - | - | - | - | - | - |
| Q7 | Free-time package tour | 37% | | | 65% | | 37% | 38% | | 45% |
| | Individually arranged travel (FIT) | 33% | 100% | 67% | 12% | 100% | 33% | 33% | | 39% |
| | Full package tour | 27% | | | 24% | | 28% | 28% | | 9% |
| | Group tour | 2% | | 33% | | | 2% | 1% | 100% | 4% |
| | Company paid travel | 1% | | | | | | | | 4% |
| | Total | 350 | 117 | 3 | 17 | 1 | 298 | 290 | 8 | 56 |

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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 | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|-----|--------------------------------|-------|-----|------|------------|---------|------------------|--------|------------|----------------|
| | | - | - | - | - | - | - | - | - | - |
| Q5A | Relax | 58% | 59% | | 35% | | 67% | 60% | 50% | 45% |
| | Natural beauty | 56% | 51% | 67% | 47% | | 65% | 57% | 50% | 44% |
| | Recomm-friend/family/trvl agnt | 37% | 32% | 33% | 12% | 100% | 35% | 37% | 38% | 11% |
| | Safe | 29% | 26% | | 12% | | 29% | 30% | 38% | 36% |
| | Short travel time | 27% | 33% | | 29% | | 25% | 27% | 25% | 18% |
| | Shopping | 20% | 24% | | 24% | | 21% | 21% | | 20% |
| | Water sports | 16% | 18% | | 12% | | 14% | 16% | | 18% |
| | Pleasure | 16% | 13% | 33% | 24% | | 19% | 17% | 25% | 24% |
| | Previous trip | 9% | 11% | | 6% | | 7% | 9% | | 56% |
| | Price | 9% | 9% | 33% | 6% | | 8% | 8% | | 2% |
| | Visit friends/ Relatives | 5% | 6% | | | | 4% | 5% | 13% | 7% |
| | Honeymoon | 5% | 2% | | 100% | | 4% | 6% | | 2% |
| | Other | 3% | 3% | | | | 2% | 2% | 13% | 5% |
| | Scuba | 2% | 4% | | | | 1% | 2% | | 2% |
| | Organized sports | 2% | 1% | | | | 2% | 2% | | |
| | Company/ Business Trip | 1% | 1% | | | | 0% | 0% | 13% | 5% |
| | Career Cert/ Testing | 1% | 1% | | | | | | | 5% |
| | Company Sponsored | 1% | 2% | 100% | | 100% | 1% | 1% | 13% | 2% |
| | Golf | 1% | 1% | | | | 1% | 1% | | |
| | Married/ Attn wedding | 0% | 1% | 33% | | 100% | | 0% | | |
| | Total | 347 | 117 | 3 | 17 | 1 | 298 | 287 | 8 | 55 |

Prepared by QMark Research

SECTION 3

EXPENDITURES

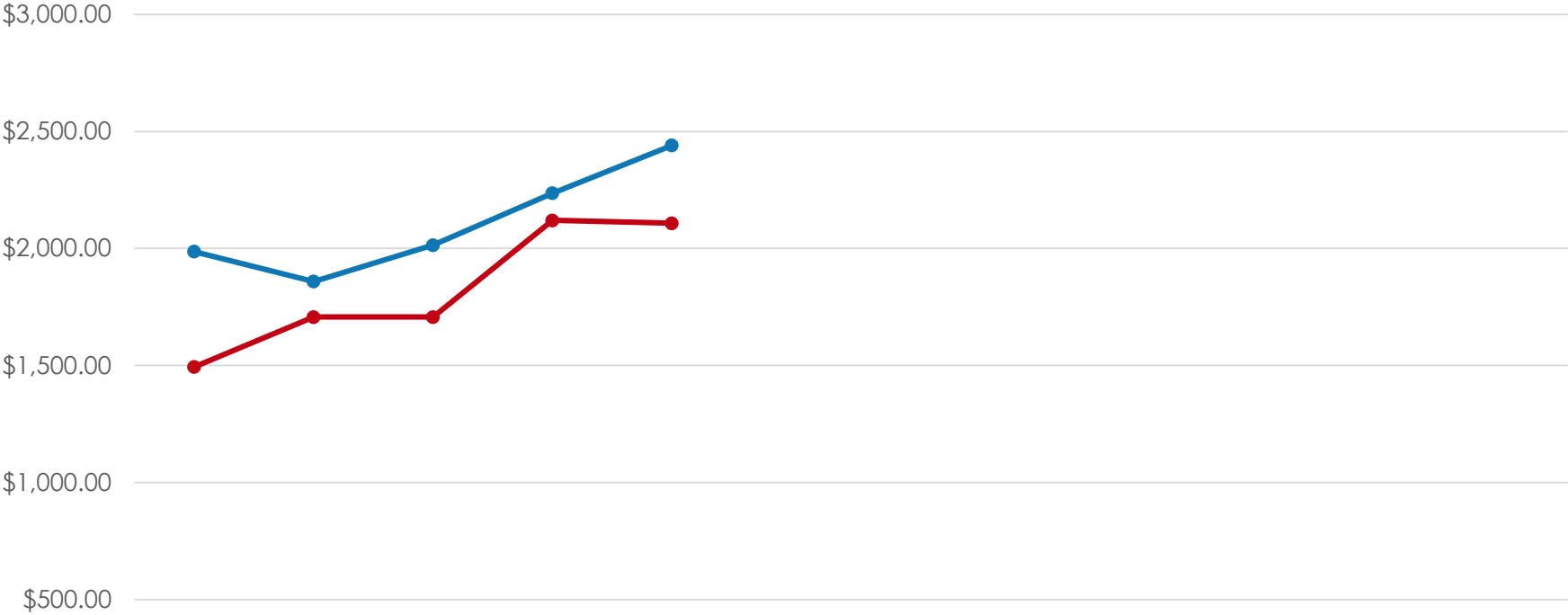
Prepaid Expenditures

EXCHANGE RATE KW1,138.65=\$1

- \$2,440.06 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$840.37 = overall mean average per person prepaid expenditures

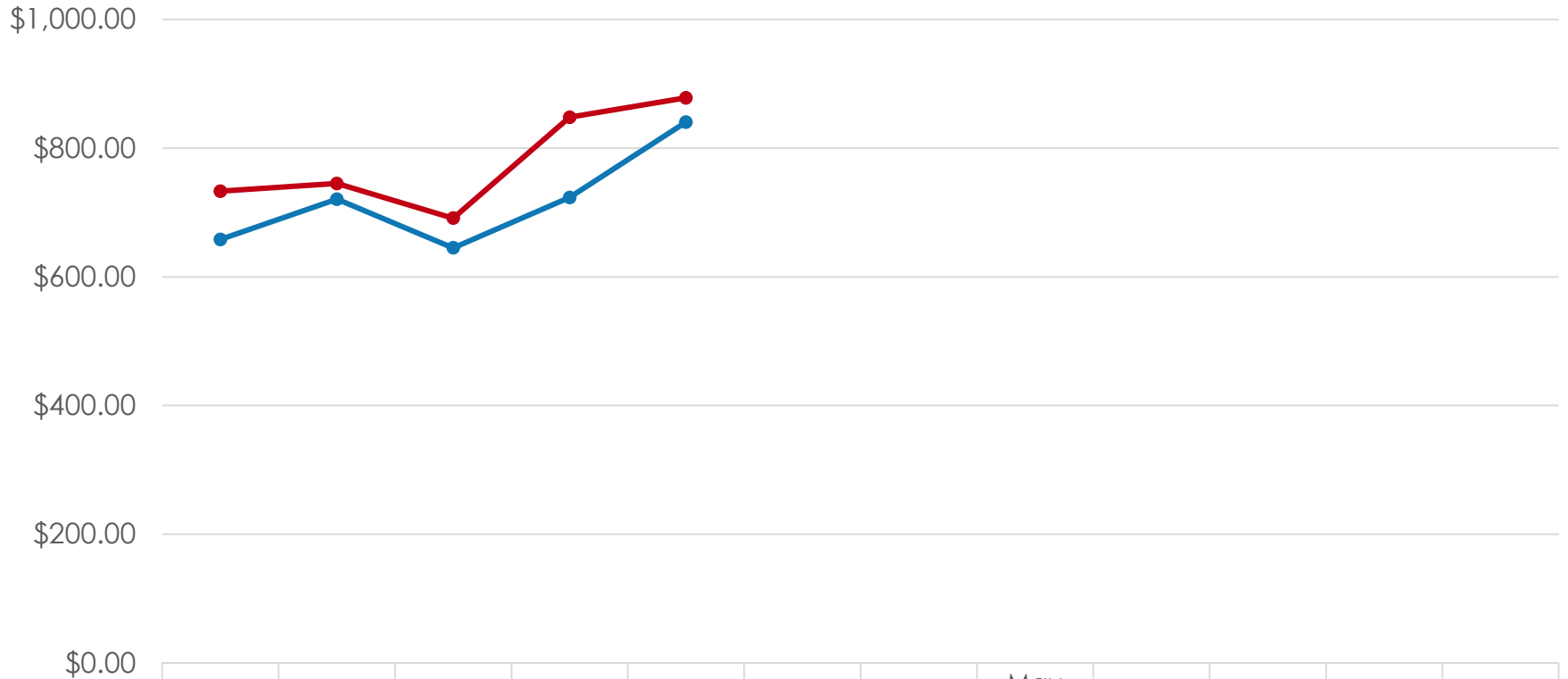
Prepaid Entire Travel Party – FY2017

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 | \$1,986.98 | \$1,858.83 | \$2,014.43 | \$2,236.01 | \$2,440.06 | | | | | | | |
| MEDIAN | \$1,494.00 | \$1,707.00 | \$1,707.00 | \$2,120.00 | \$2,108.00 | | | | | | | |

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 | \$658.04 | \$720.62 | \$645.02 | \$723.26 | \$840.37 | | | | | | | |
| MEDIAN | \$733.00 | \$745.00 | \$691.00 | \$848.00 | \$878.00 | | | | | | | |

Prepaid Per Person– Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

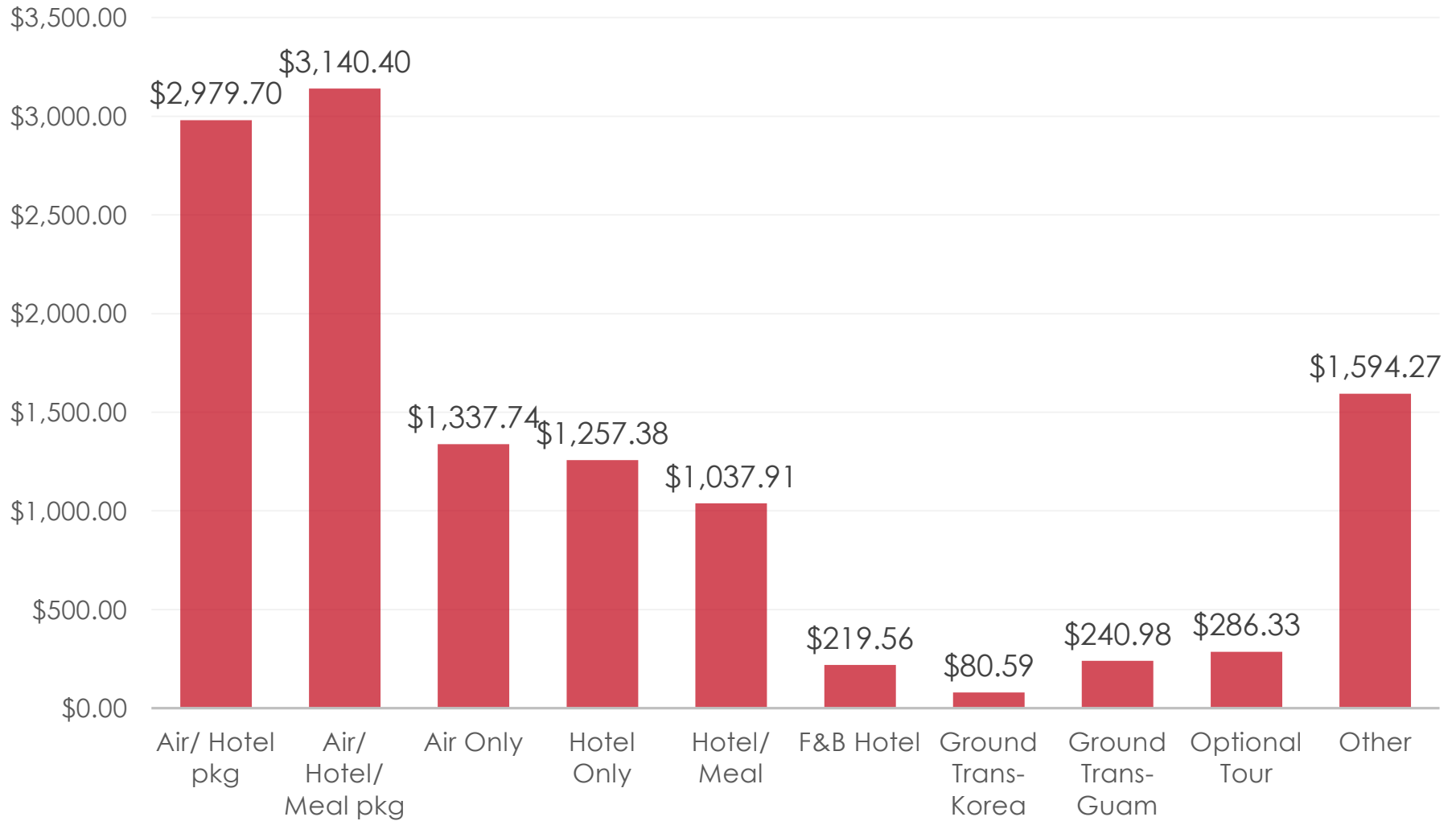
Q10A How much did you pay in RUSSIA before coming to Guam for the tour package, your airfare, lodging meals, and transportation?

PER PERSON

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|------------|--------|----------|----------|----------|------------|---------|------------------|----------|------------|----------------|
| | | - | - | - | - | - | - | - | - | - |
| PREPAID PP | Mean | \$840.37 | \$745.10 | \$380.57 | \$1,387.87 | \$0.00 | \$819.95 | \$797.11 | \$447.79 | \$864.04 |
| | Median | \$878 | \$707 | \$0 | \$1,339 | \$0 | \$878 | \$878 | \$0 | \$878 |

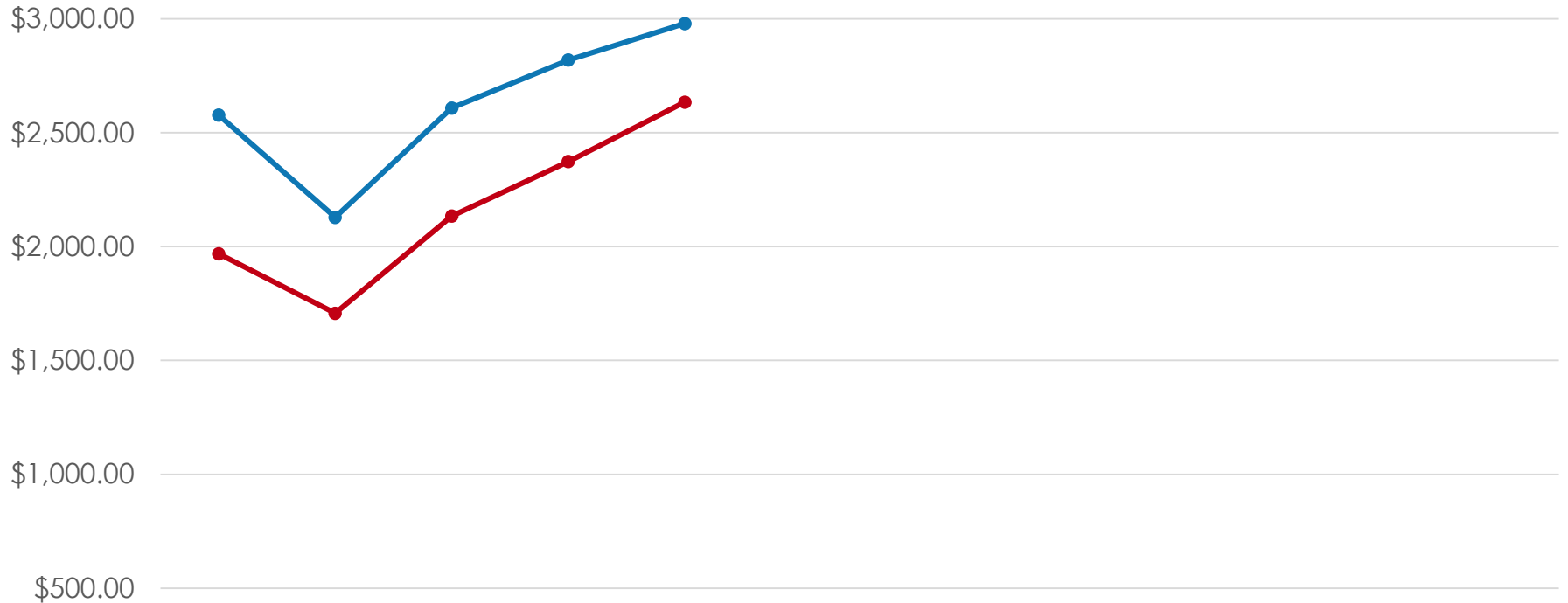
Prepared by QMark Research

Prepaid Expenses by Category – MEAN Entire Travel Party



Prepaid- FY2017 Tracking

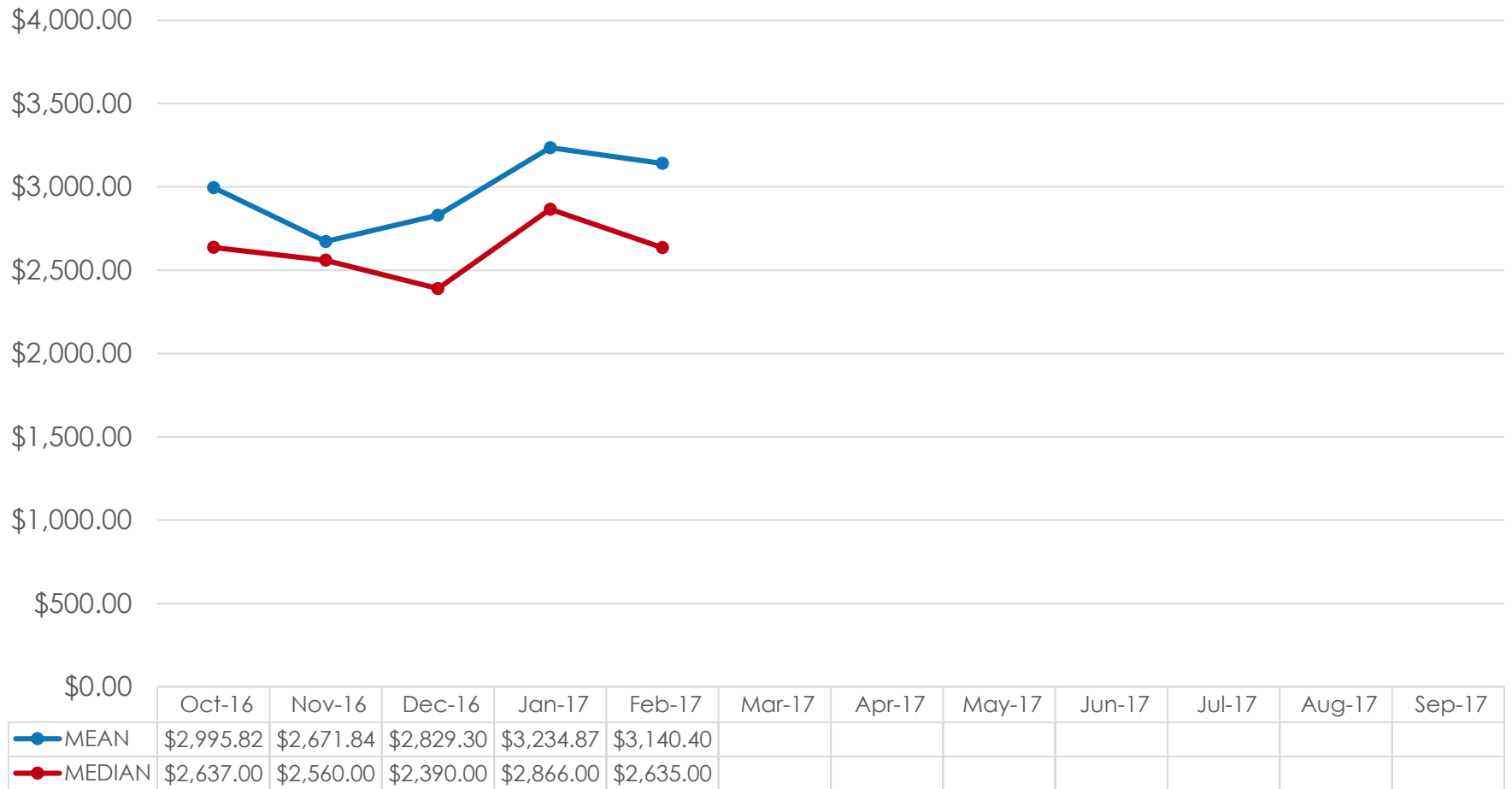
Airfare & Accommodation Packages



| | 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 | \$2,578.15 | \$2,128.73 | \$2,608.73 | \$2,819.60 | \$2,979.70 | | | | | | | |
| MEDIAN | \$1,969.00 | \$1,707.00 | \$2,134.00 | \$2,374.00 | \$2,635.00 | | | | | | | |

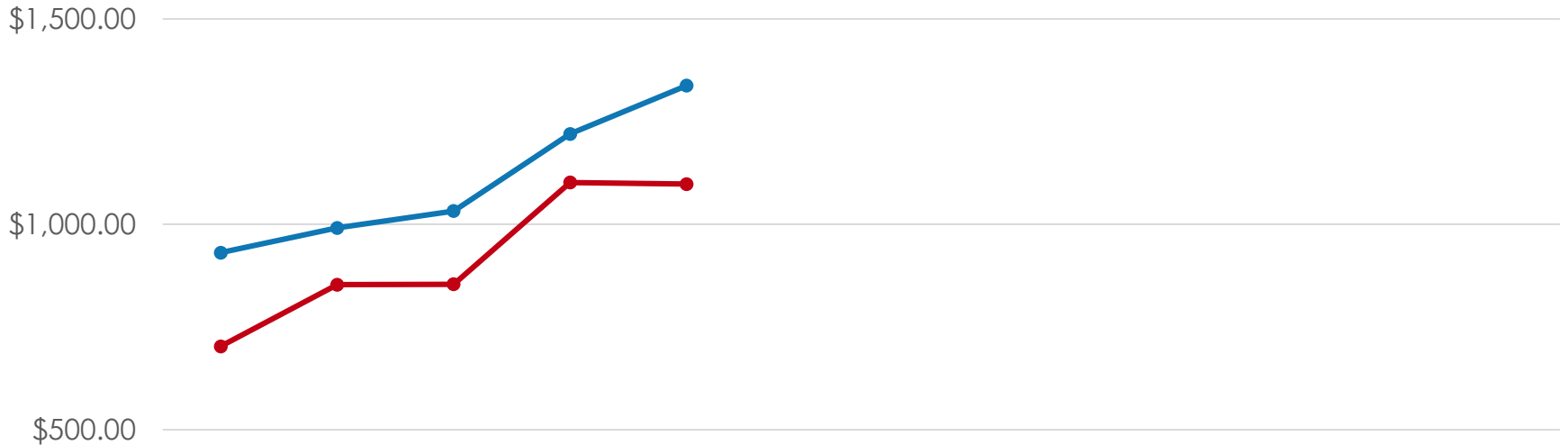
Prepaid- FY2017 Tracking

Airfare & Accommodation W/ Meal Packages



Prepaid- FY2017 Tracking

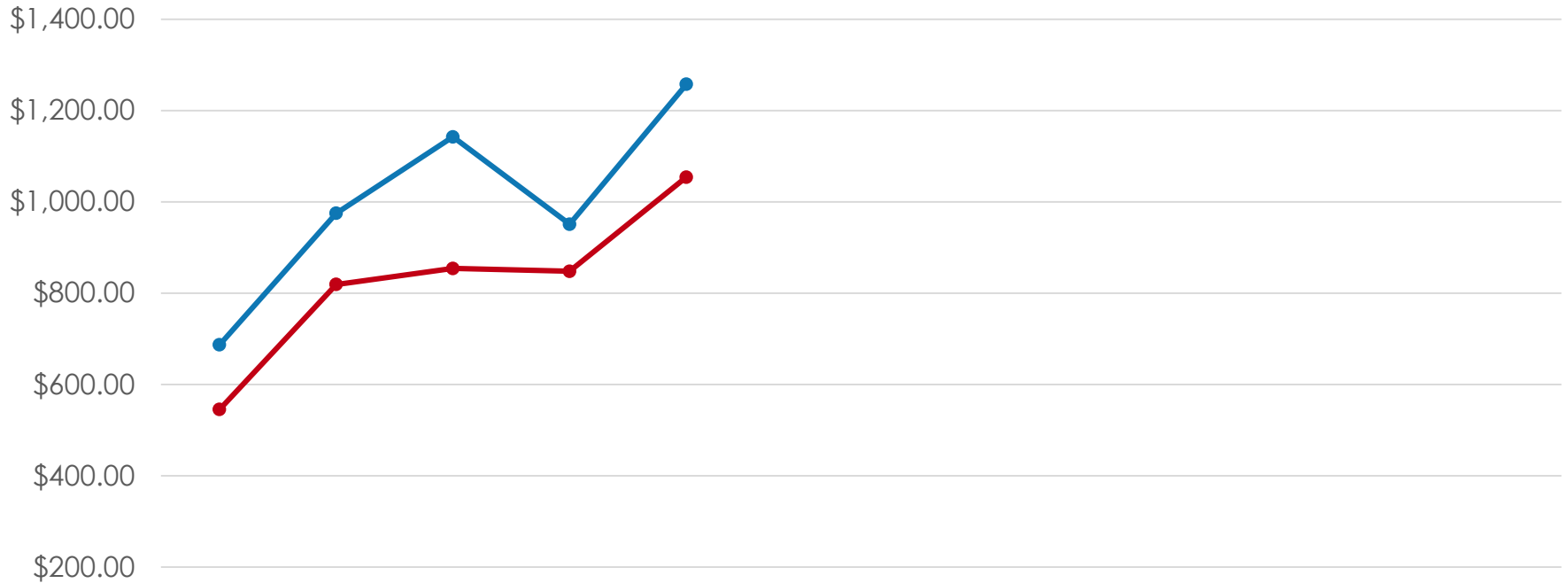
Airfare Only



| | 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 | \$930.99 | \$991.20 | \$1,032.22 | \$1,220.24 | \$1,337.74 | | | | | | | |
| MEDIAN | \$703.00 | \$853.00 | \$854.00 | \$1,102.00 | \$1,098.00 | | | | | | | |

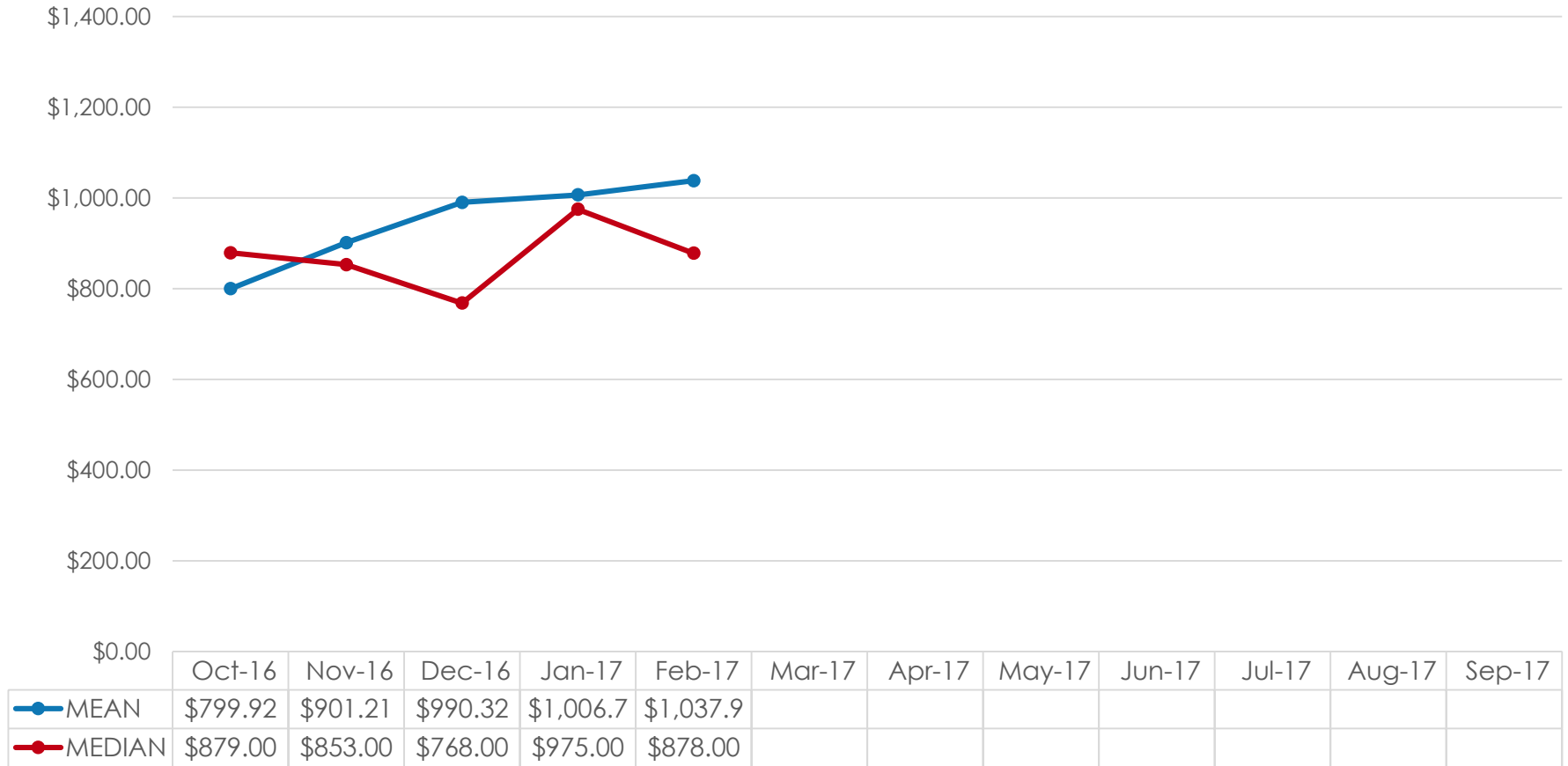
Prepaid- FY2017 Tracking

Accommodations 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 | \$686.81 | \$974.76 | \$1,142.28 | \$951.10 | \$1,257.38 | | | | | | | |
| MEDIAN | \$545.00 | \$819.00 | \$854.00 | \$848.00 | \$1,054.00 | | | | | | | |

Prepaid- FY2017 Tracking Accommodations w/ Meal Only



Prepaid- FY2017 Tracking

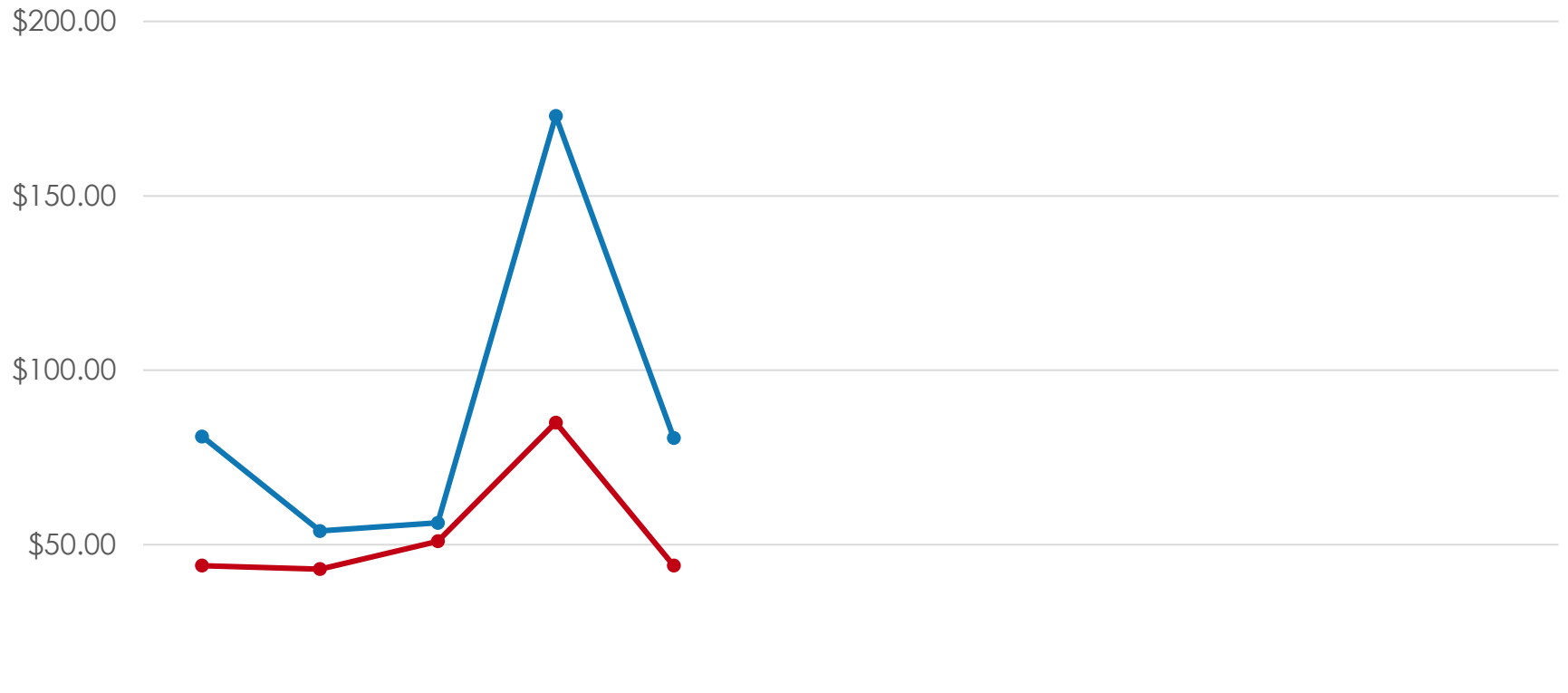
Food & Beverage in Hotel



| | 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 | \$791.13 | \$426.71 | \$847.81 | | \$219.56 | | | | | | | |
| MEDIAN | \$791.00 | \$427.00 | \$848.00 | | \$220.00 | | | | | | | |

Prepaid- FY2017 Tracking

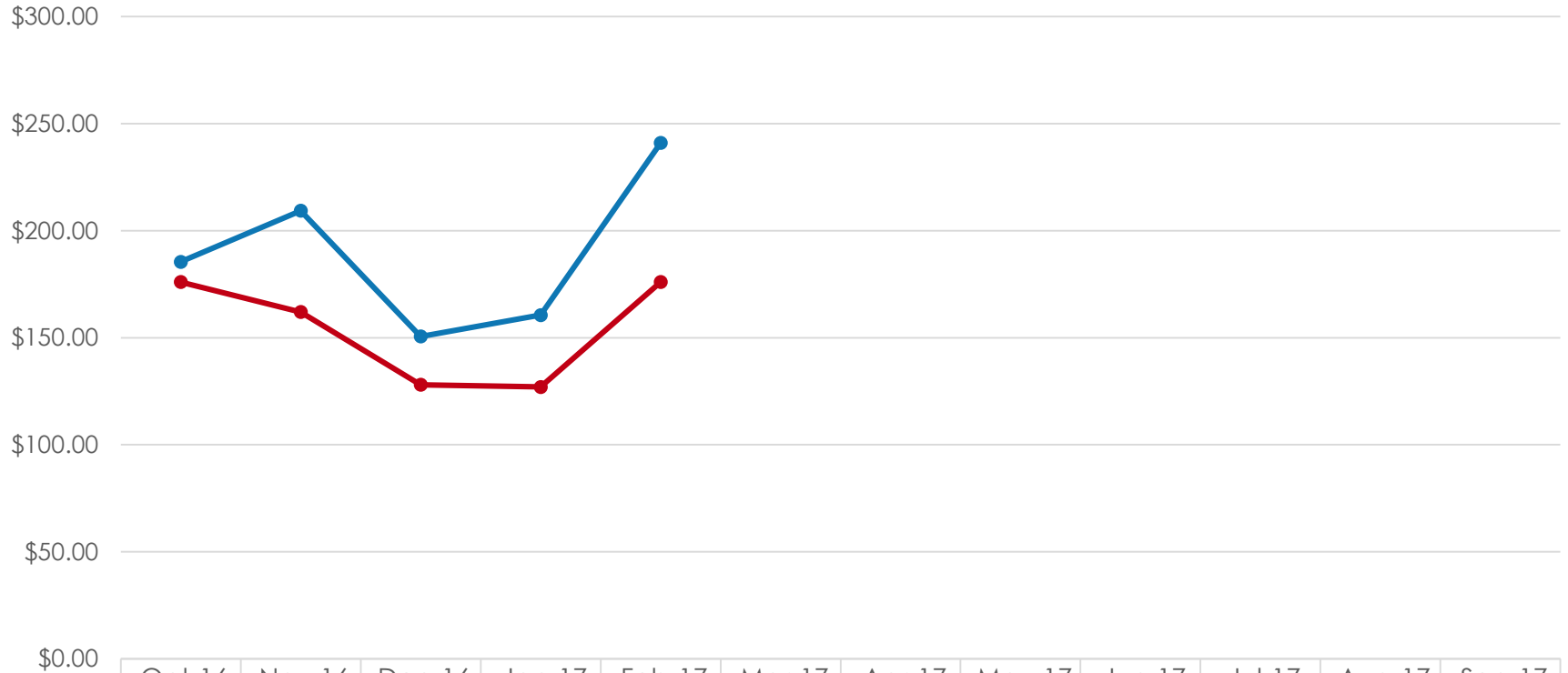
Ground Transportation - Korea



| | 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 | \$81.02 | \$53.95 | \$56.26 | \$172.95 | \$80.59 | | | | | | | |
| MEDIAN | \$44.00 | \$43.00 | \$51.00 | \$85.00 | \$44.00 | | | | | | | |

Prepaid- FY2017 Tracking

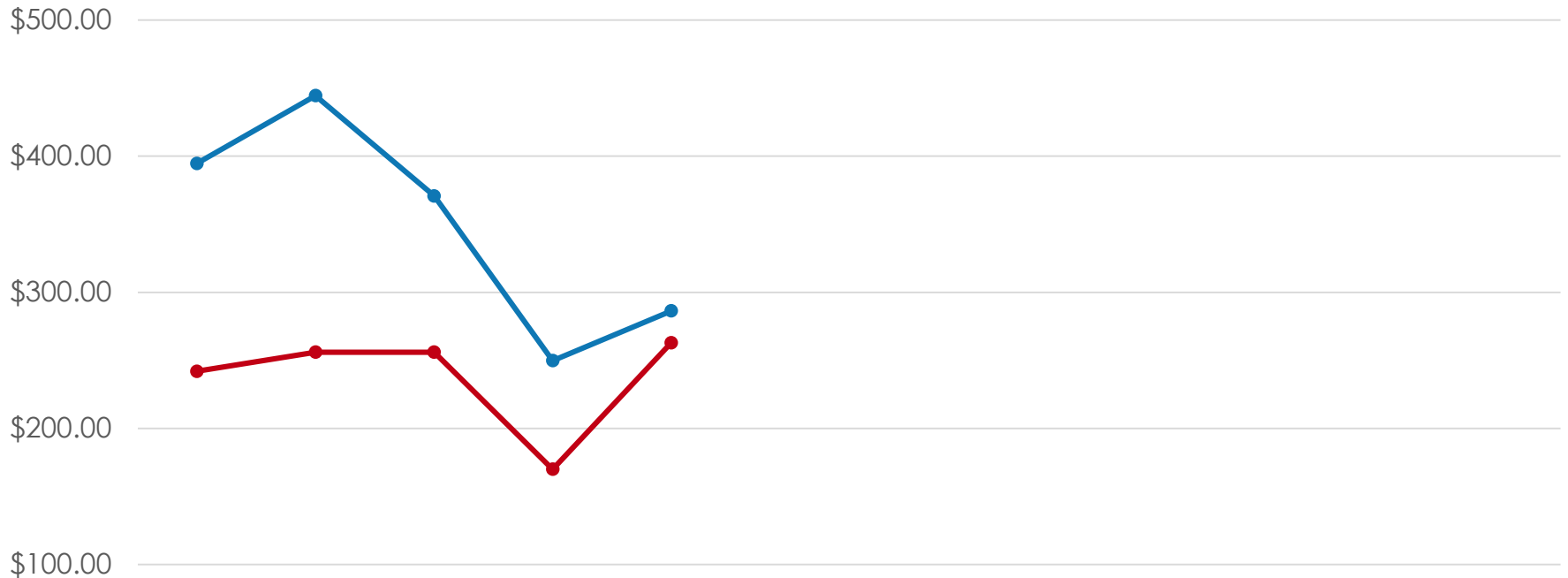
Ground Transportation - Guam



| | 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 | \$185.47 | \$209.35 | \$150.57 | \$160.59 | \$240.98 | | | | | | | |
| MEDIAN | \$176.00 | \$162.00 | \$128.00 | \$127.00 | \$176.00 | | | | | | | |

Prepaid- FY2017 Tracking

Optional tours/ Activities

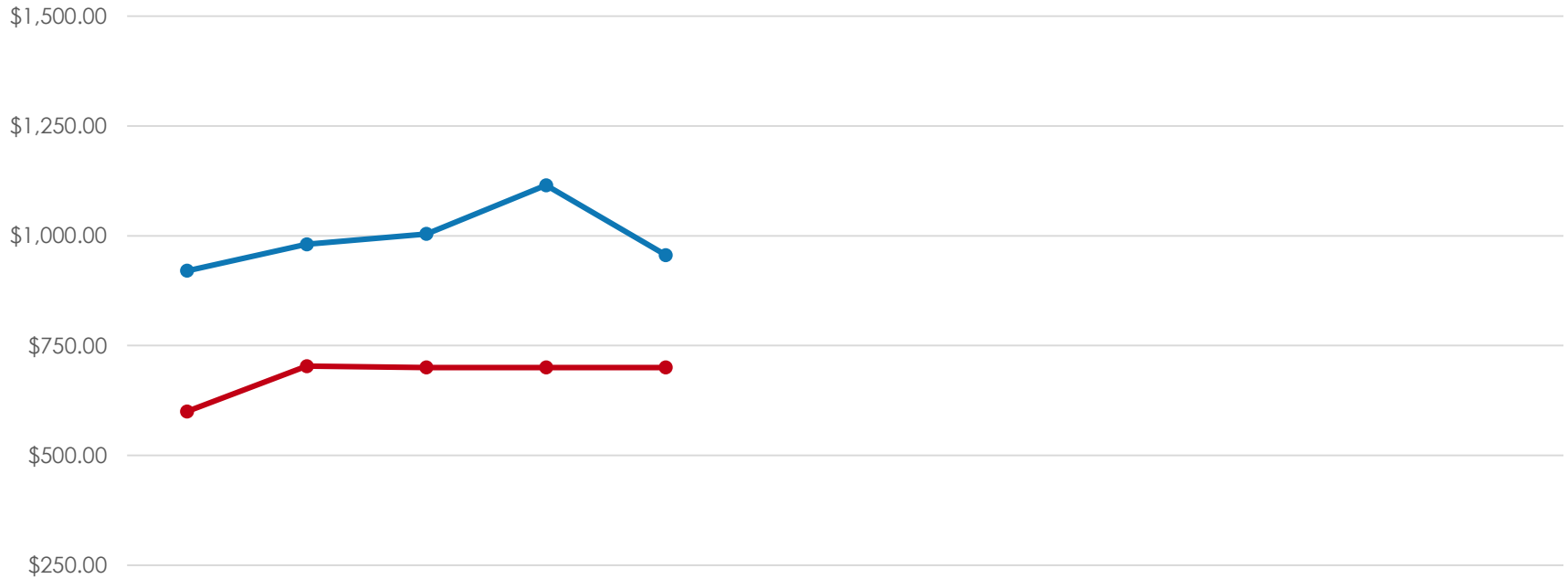


| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|----------|----------|----------|----------|----------|--------|--------|--------|--------|--------|--------|--------|
| MEAN | \$394.68 | \$444.49 | \$370.79 | \$249.85 | \$286.33 | | | | | | | |
| MEDIAN | \$242.00 | \$256.00 | \$256.00 | \$170.00 | \$263.00 | | | | | | | |

On-Island Expenditures

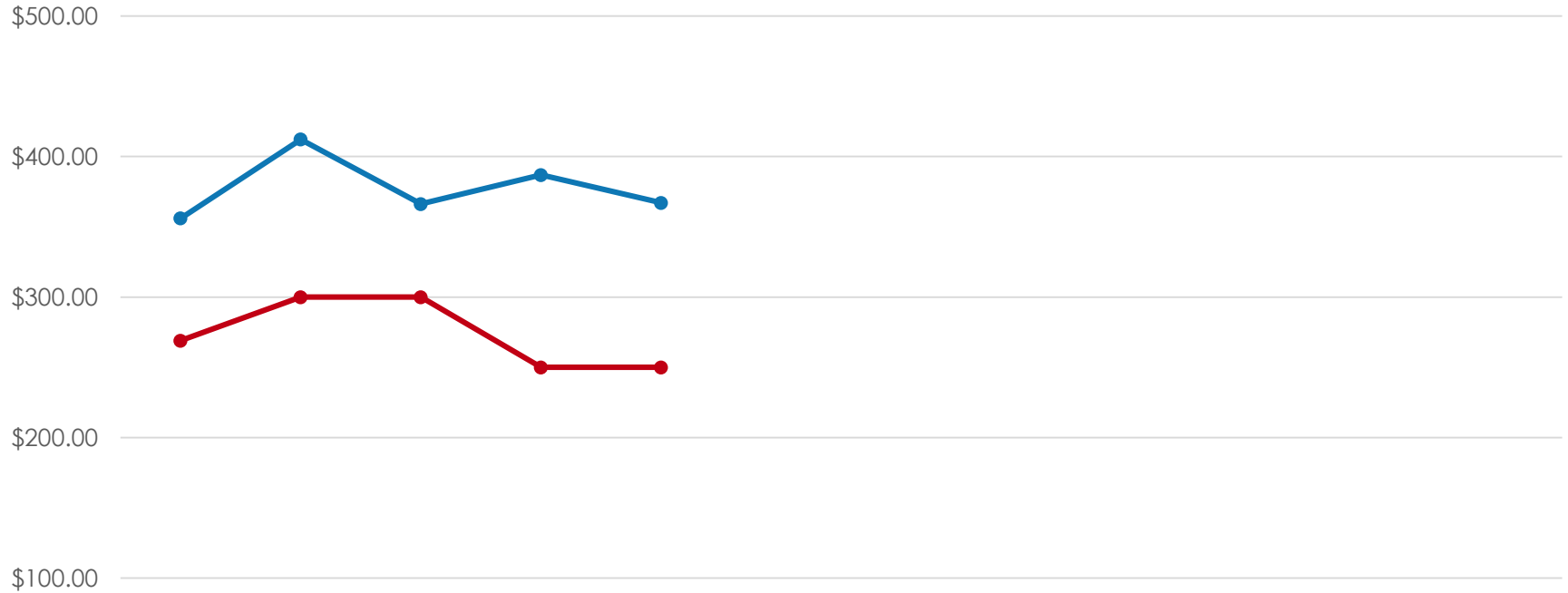
- \$955.97 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$367.09 = overall mean average per person prepaid expenditures

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 | \$920.41 | \$980.55 | \$1,004.0 | \$1,114.8 | \$955.97 | | | | | | | |
| MEDIAN | \$600.00 | \$703.00 | \$700.00 | \$700.00 | \$700.00 | | | | | | | |

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 | \$356.05 | \$412.21 | \$366.24 | \$386.94 | \$367.09 | | | | | | | |
| MEDIAN | \$269.00 | \$300.00 | \$300.00 | \$250.00 | \$250.00 | | | | | | | |

On-Island Per Person – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

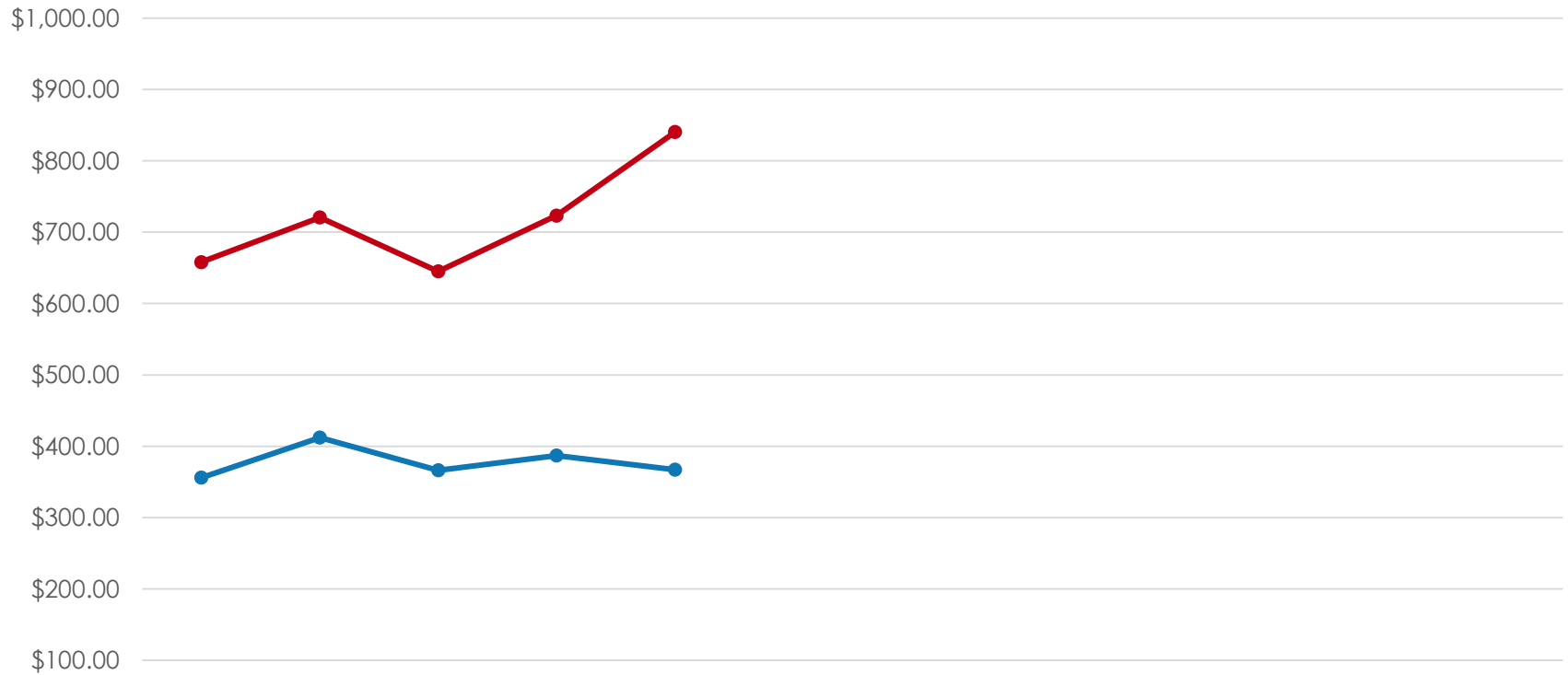
Q11A How much in total did you spend while on Guam during this trip?

PER PERSON

| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|-----------|--------|----------|----------|----------|------------|----------|------------------|----------|------------|----------------|
| | | - | - | - | - | - | - | - | - | - |
| ONISLE PP | Mean | \$367.09 | \$444.80 | \$953.33 | \$577.00 | \$540.00 | \$354.70 | \$353.99 | \$380.00 | \$407.02 |
| | Median | \$250 | \$350 | \$540 | \$500 | \$540 | \$250 | \$250 | \$170 | \$242 |

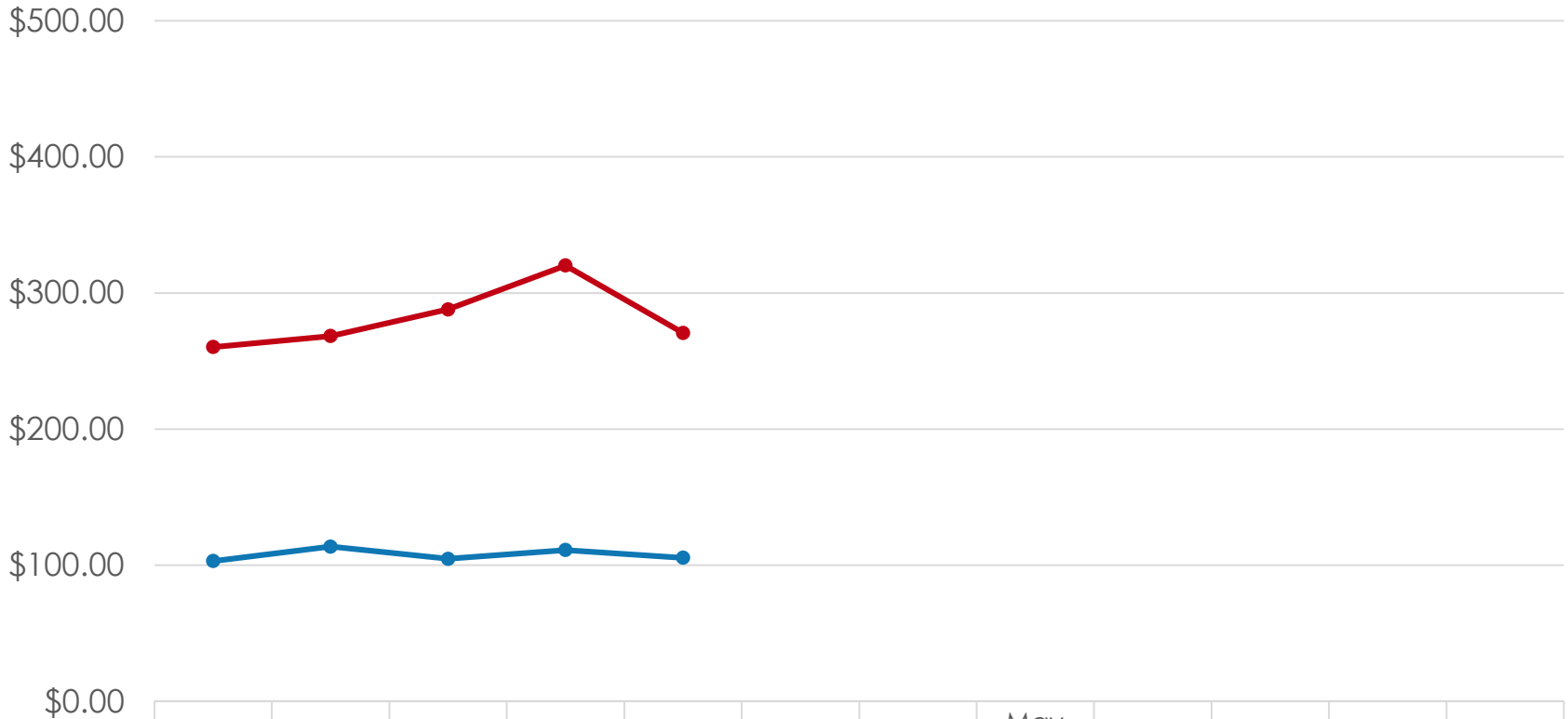
Prepared by QMark Research

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



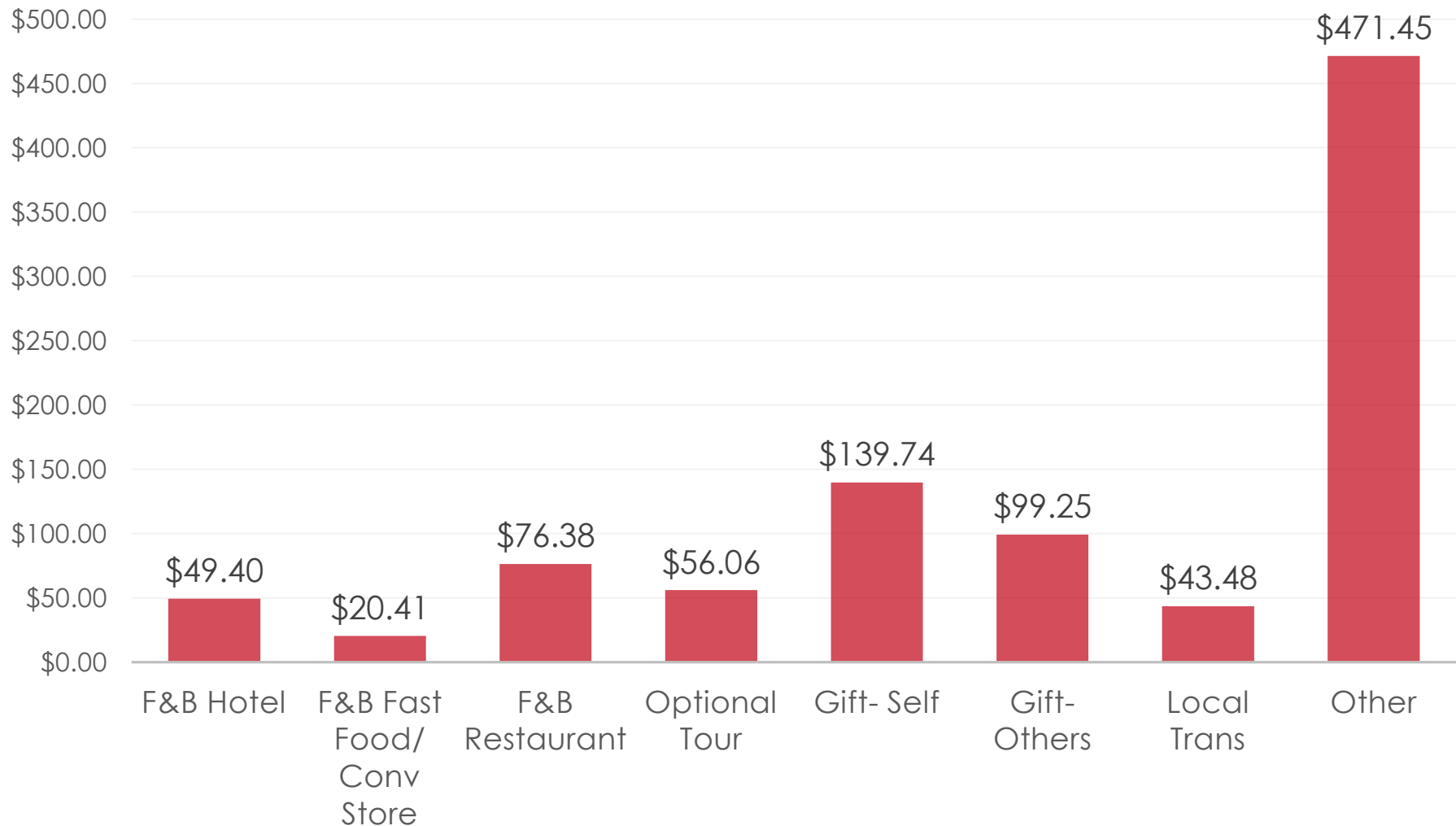
| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|-----------|----------|----------|----------|----------|----------|--------|--------|--------|--------|--------|--------|--------|
| On-Island | \$356.05 | \$412.21 | \$366.24 | \$386.94 | \$367.09 | | | | | | | |
| Prepaid | \$658.04 | \$720.62 | \$645.02 | \$723.26 | \$840.37 | | | | | | | |

On-Island Per Day Spending – FY2017 Tracking MEAN



| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------------|----------|----------|----------|----------|----------|--------|--------|--------|--------|--------|--------|--------|
| Per Person | \$103.06 | \$113.69 | \$104.72 | \$111.17 | \$105.45 | | | | | | | |
| Travel Party | \$260.30 | \$268.39 | \$287.95 | \$320.20 | \$270.68 | | | | | | | |

On-Island Expenses by Category – MEAN Entire Travel Party



On-Island – FY2017 Tracking

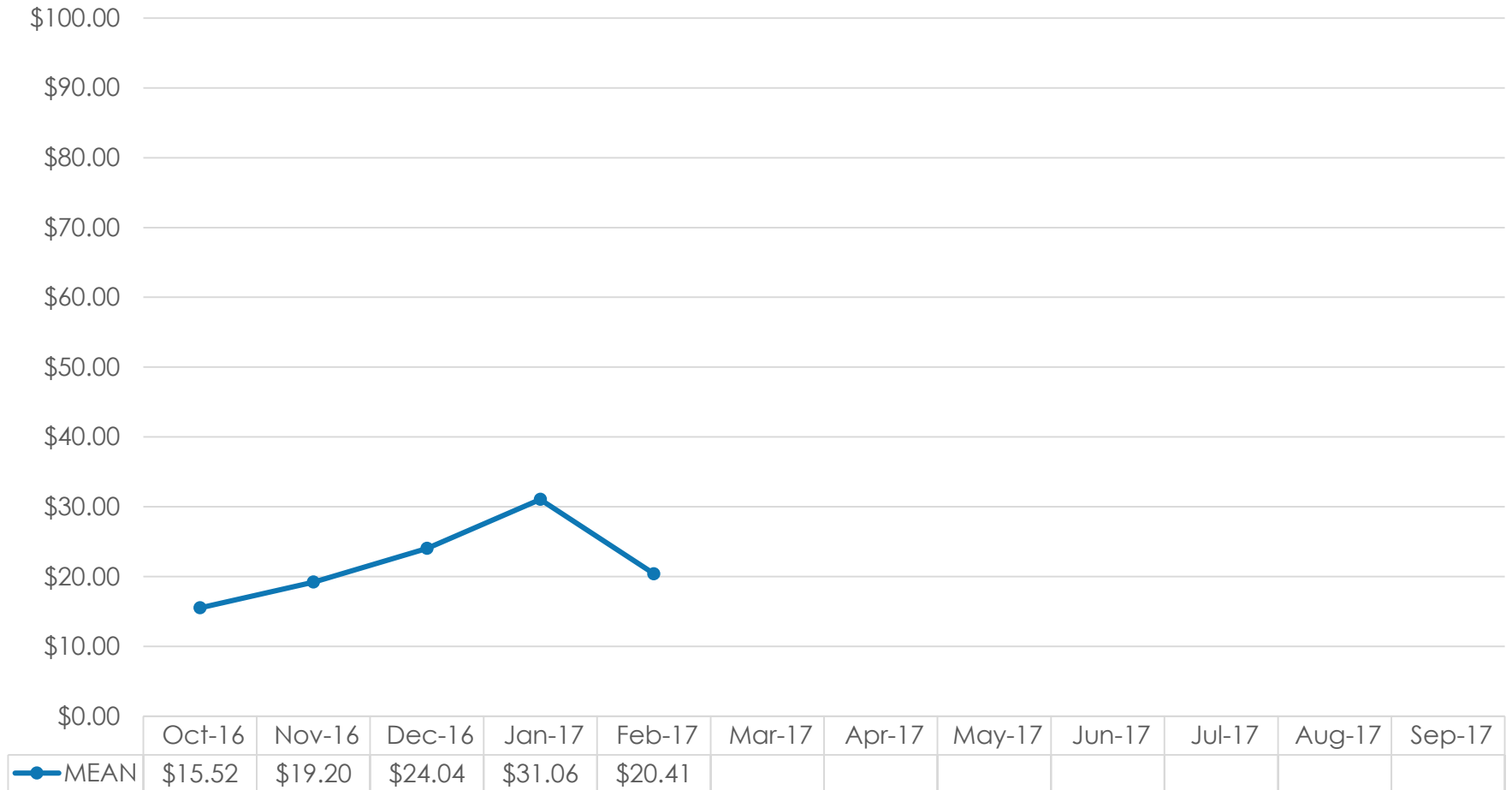
Food & Beverage - Hotel



| | 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 | \$59.16 | \$48.88 | \$58.62 | \$123.52 | \$49.40 | | | | | | | |

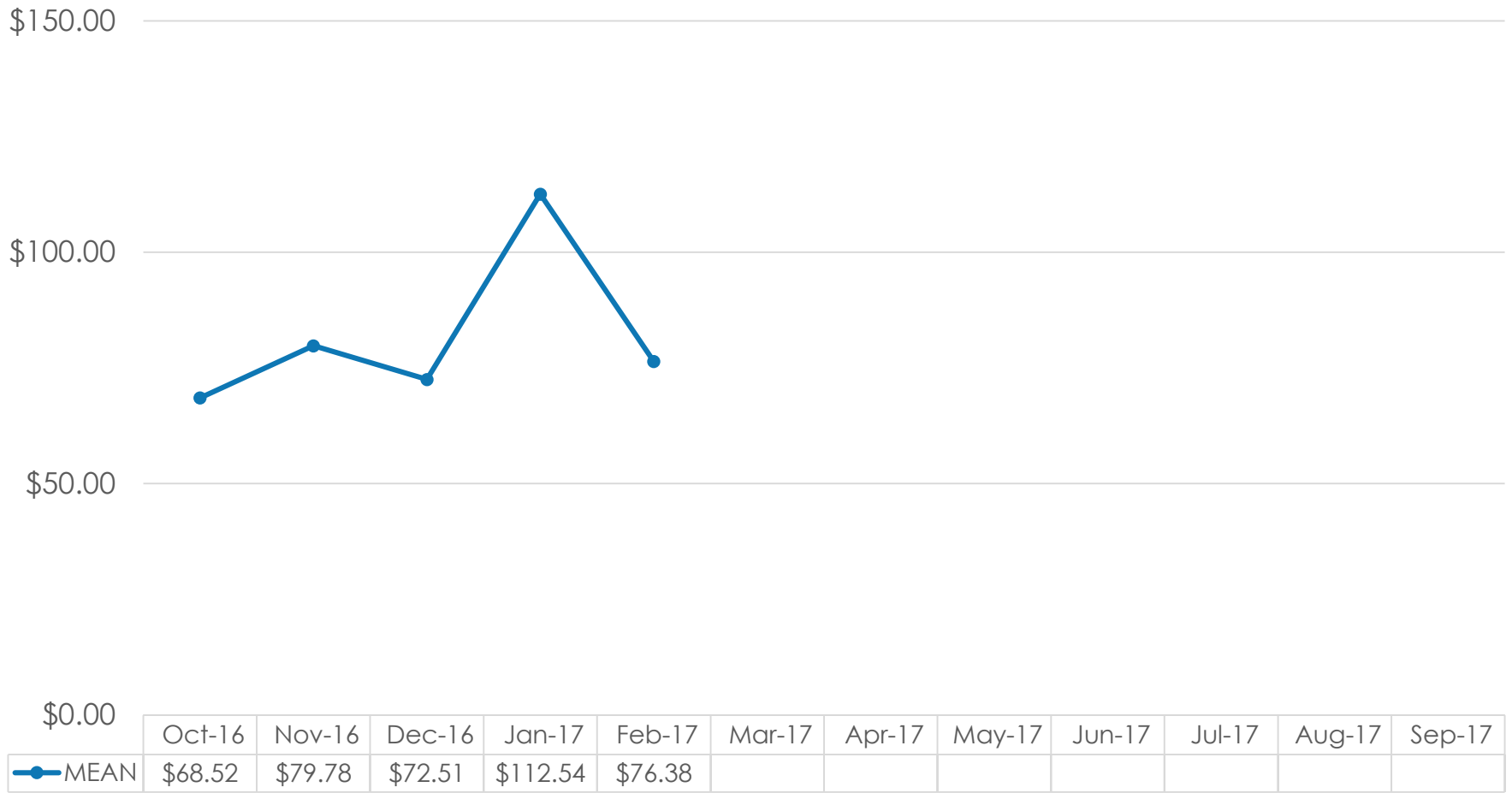
On-Island – FY2017 Tracking

Food & Beverage – Fast Food/ Convenience Store



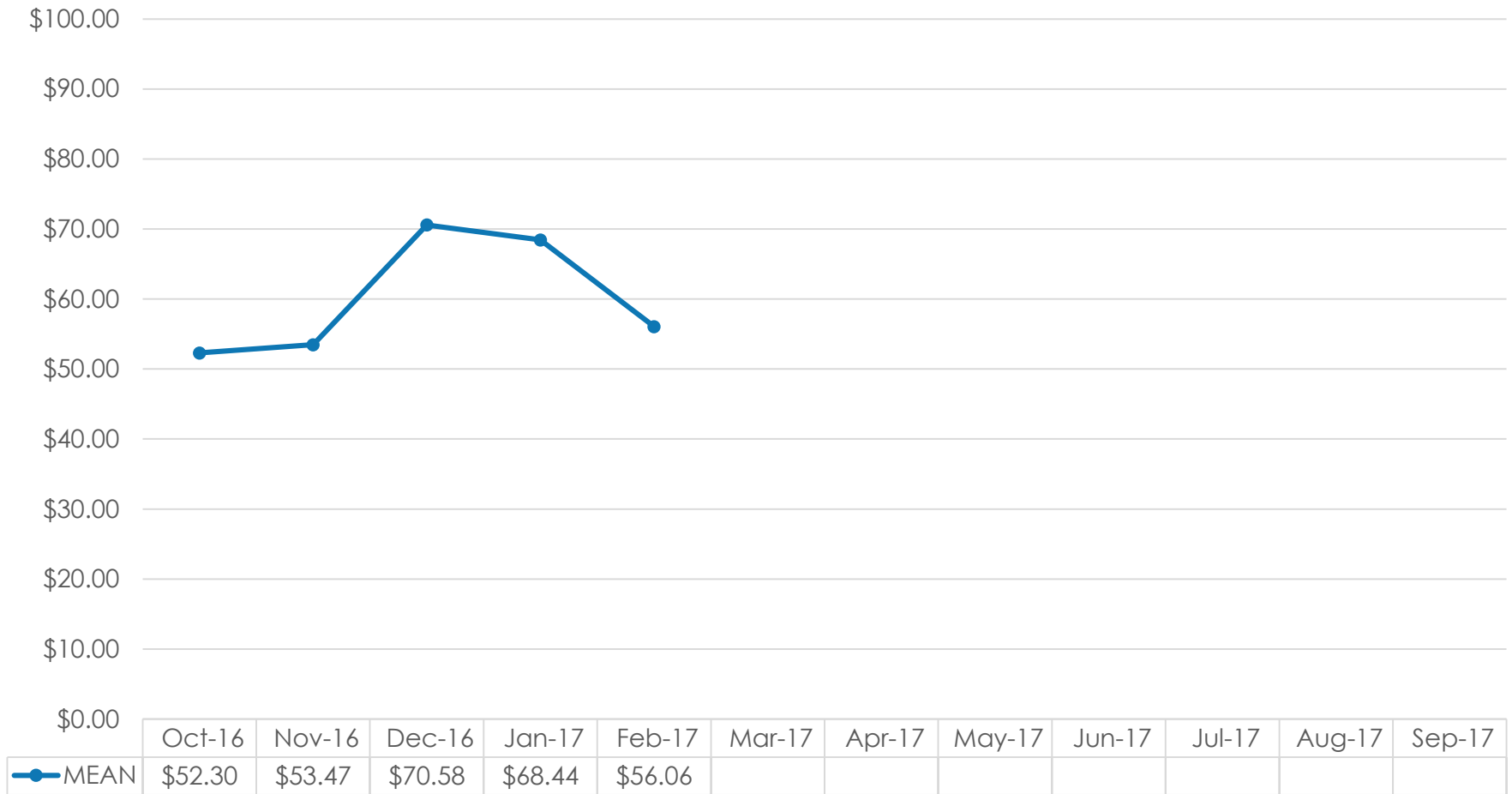
On-Island – FY2017 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



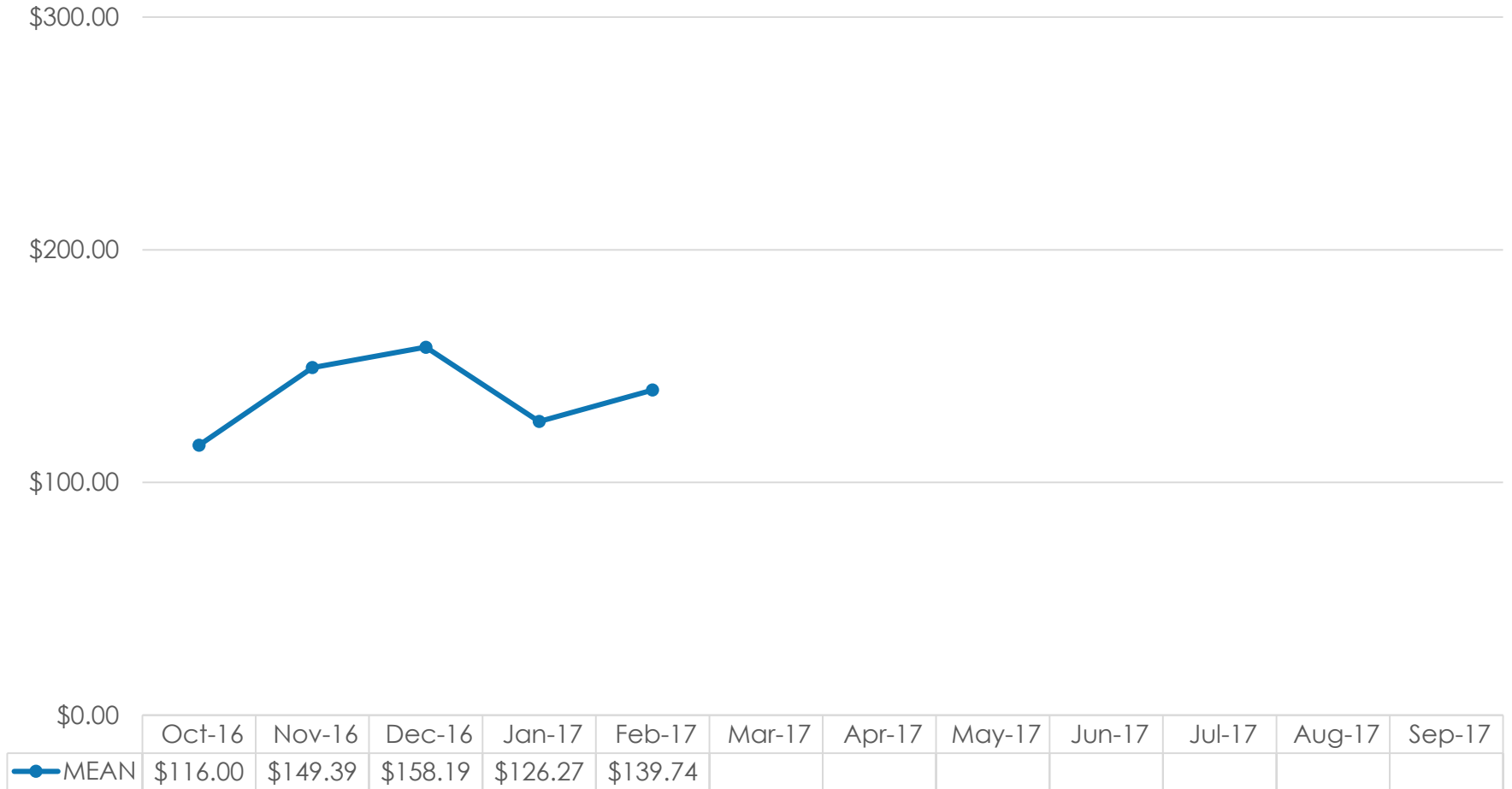
On-Island – FY2017 Tracking

Optional tour/ Activities



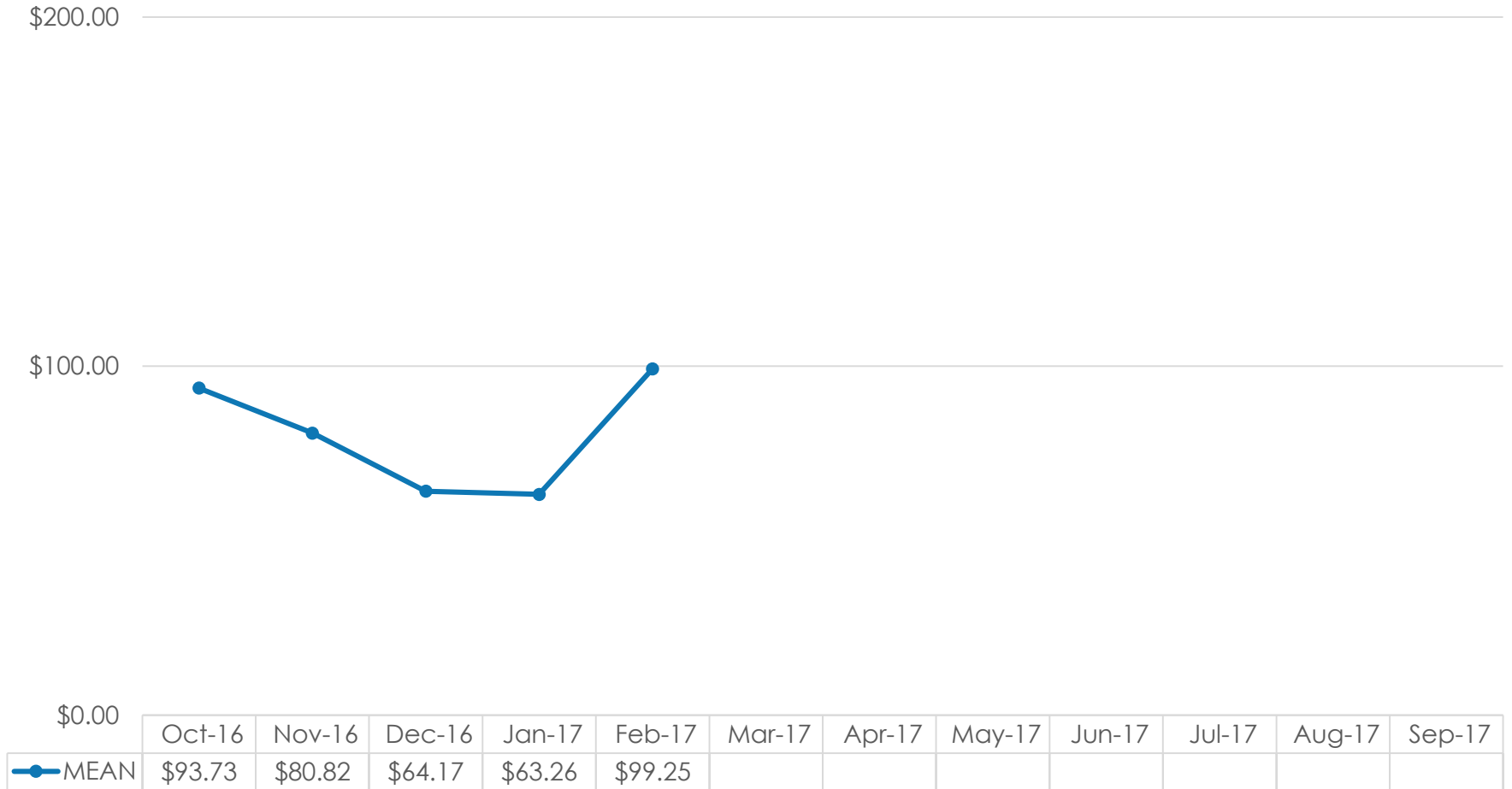
On-Island – FY2017 Tracking

Gift/ Souvenir – Self/ Companion



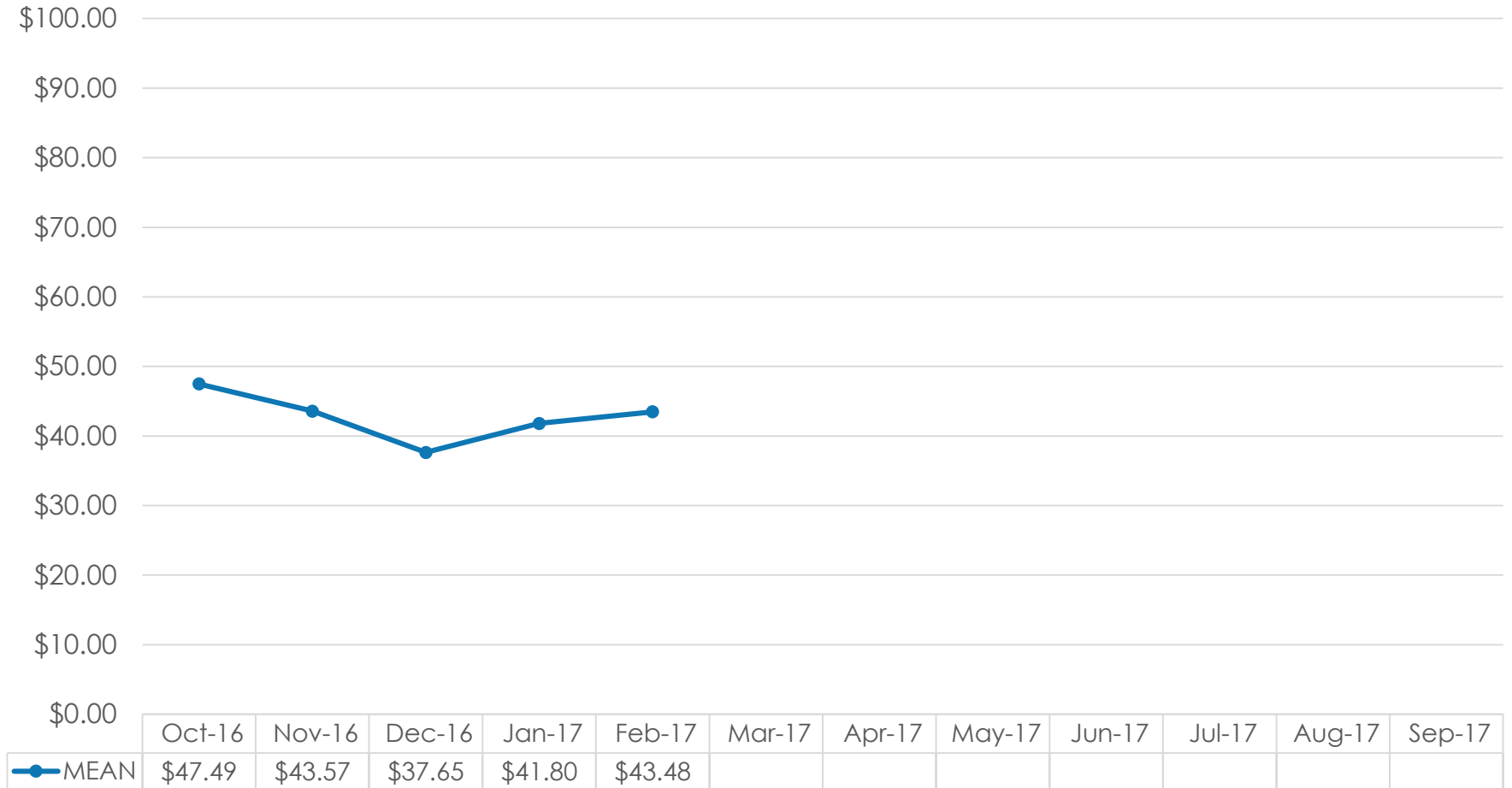
On-Island – FY2017 Tracking

Gift/ Souvenir – Friends/ Family



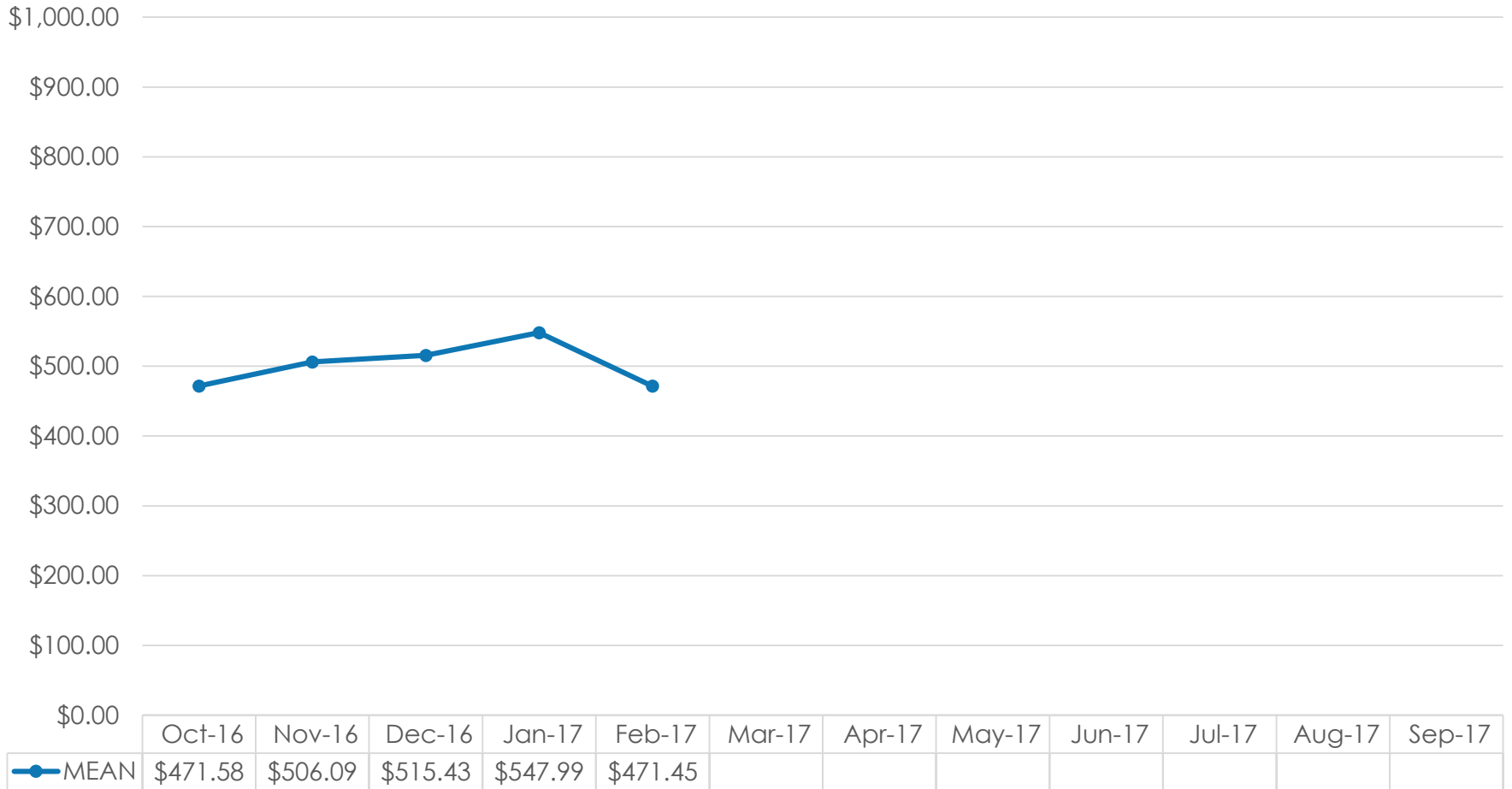
On-Island – FY2017 Tracking

Local Transportation



On-Island – FY2017 Tracking

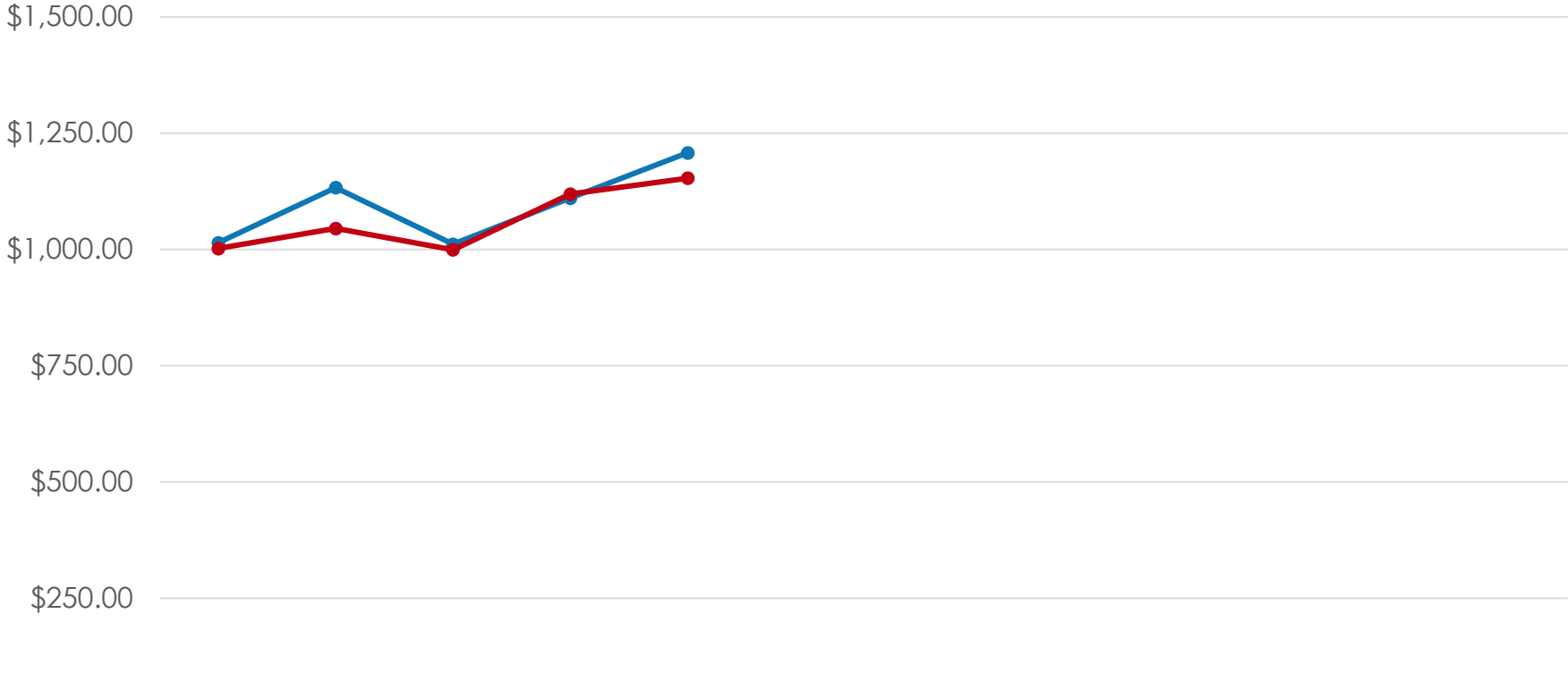
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,207.47 = 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 | \$1,014.09 | \$1,132.84 | \$1,011.26 | \$1,110.20 | \$1,207.47 | | | | | | | |
| MEDIAN | \$1,002.00 | \$1,045.00 | \$999.00 | \$1,119.00 | \$1,153.00 | | | | | | | |

TOTAL Per Person Expenditures – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

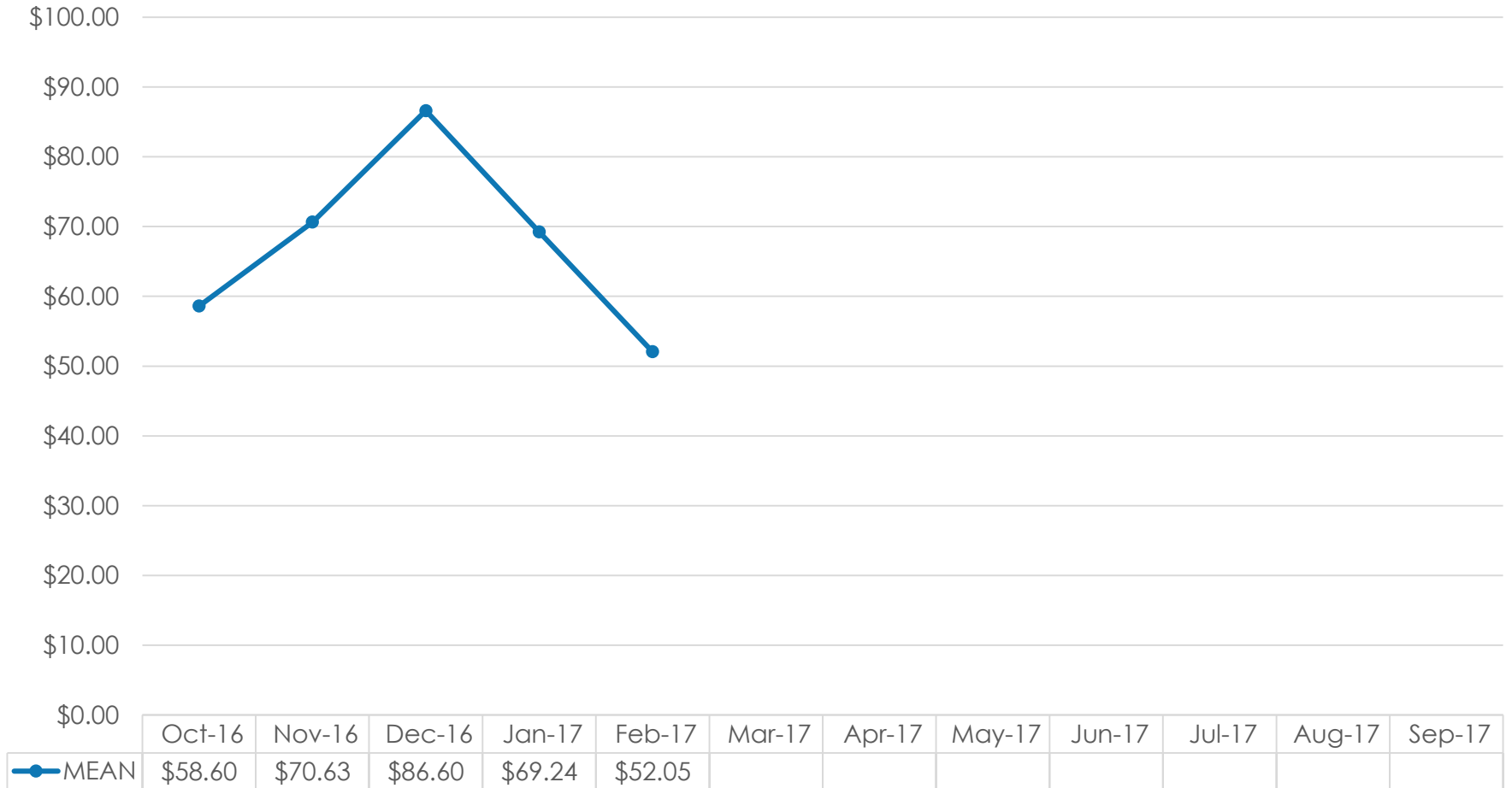
TOTAL EXPENDITURES (On-Isle / Prepaid)

PER PERSON

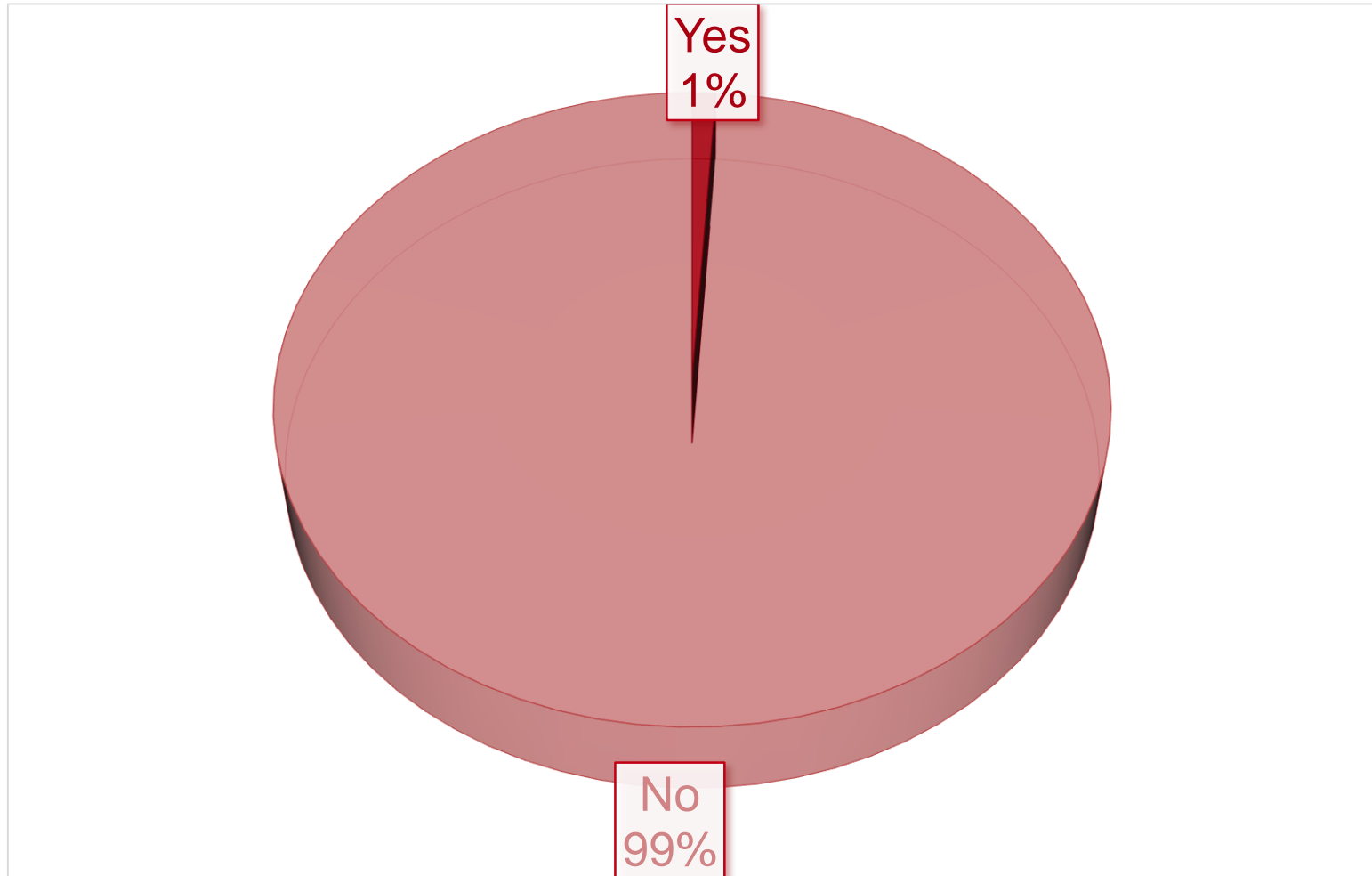
| | | TOTAL | FIT | MICE | HONEY- MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|----------|--------|------------|------------|------------|----------------|----------|---------------------|------------|---------------|-------------------|
| | | - | - | - | - | - | - | - | - | - |
| TOTAL PP | Mean | \$1,207.47 | \$1,189.90 | \$1,333.90 | \$1,964.87 | \$540.00 | \$1,174.65 | \$1,151.10 | \$827.79 | \$1,271.07 |
| | Median | \$1,153 | \$1,128 | \$540 | \$1,955 | \$540 | \$1,152 | \$1,122 | \$600 | \$1,146 |

Prepared by QMark Research

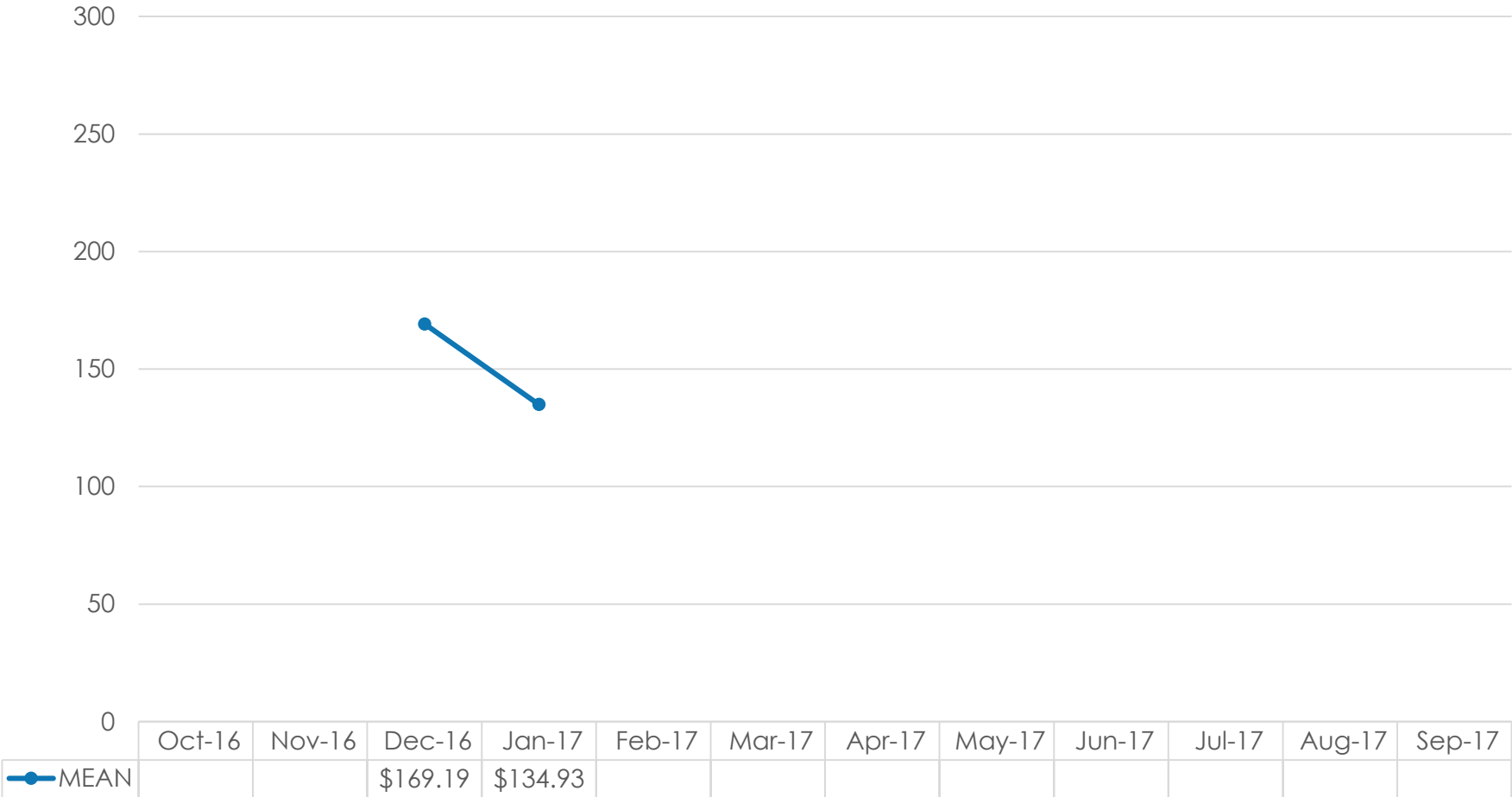
GUAM AIRPORT EXPENDITURE – FY2017 Tracking



PARTICIPATED IN SHOP GUAM e-FESTIVAL



SHOP GUAM E-FESTIVAL SPENDING – FY2017 Tracking

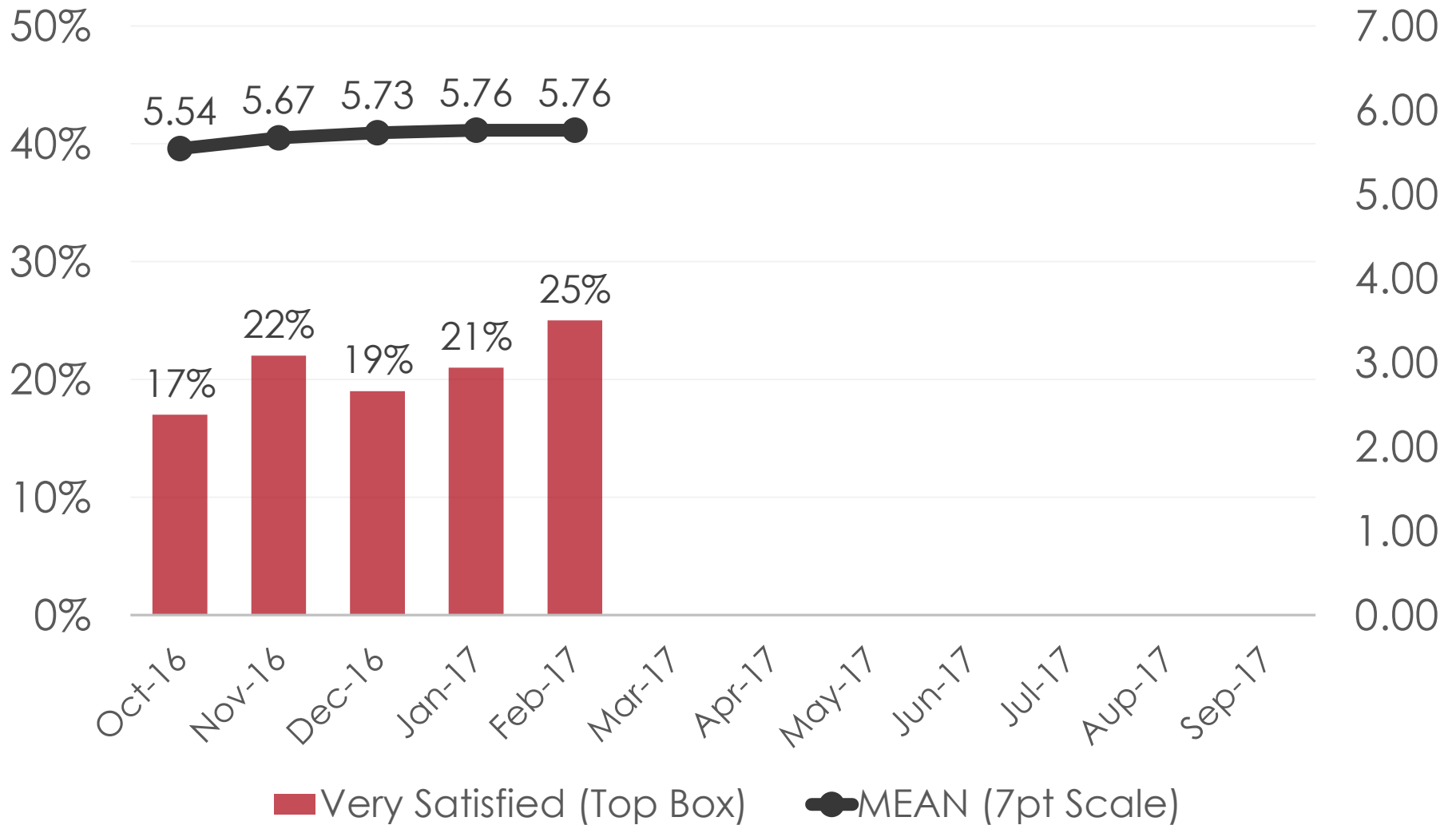


SECTION 4

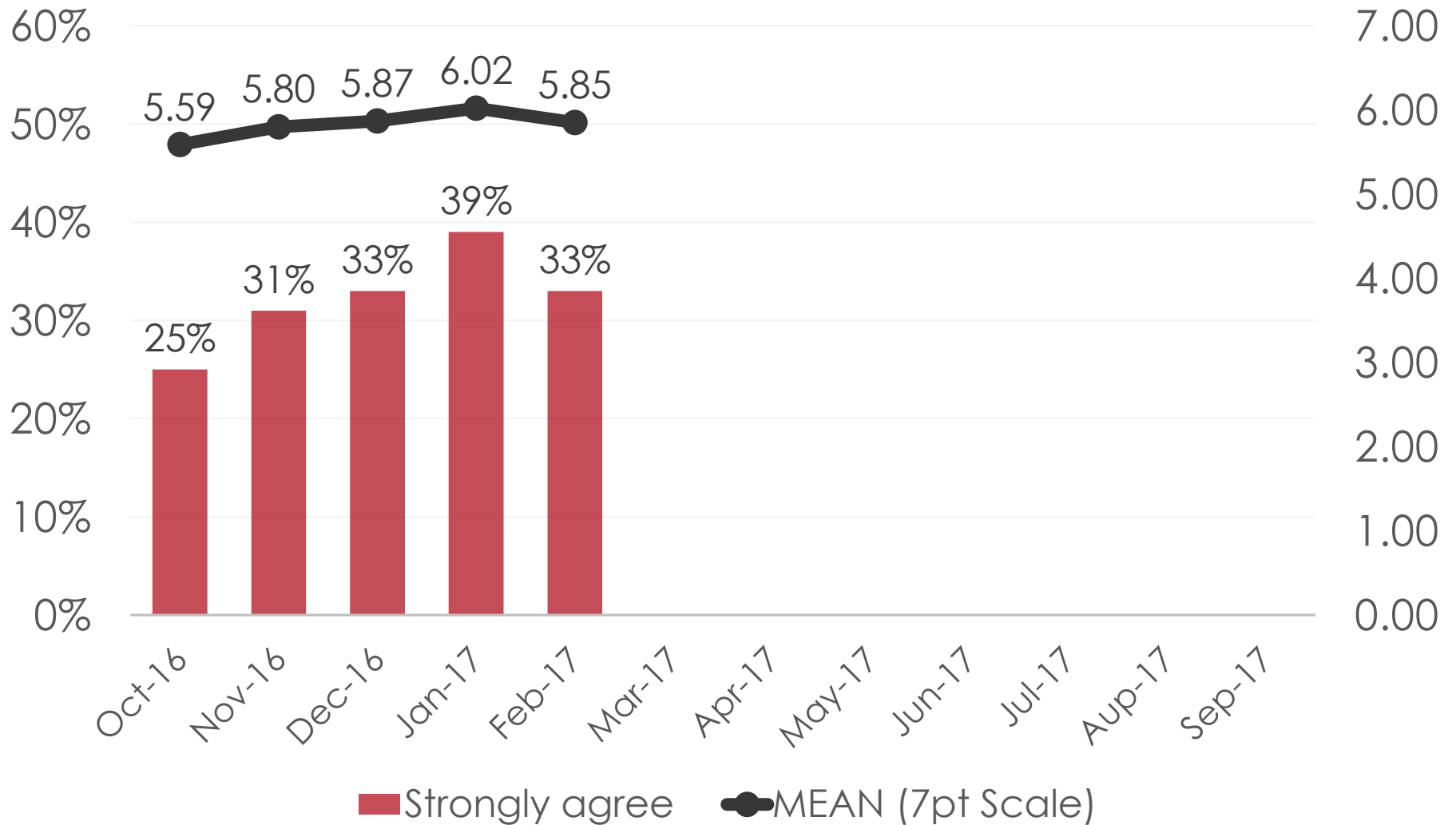
VISITOR SATISFACTION

BEHAVIOR

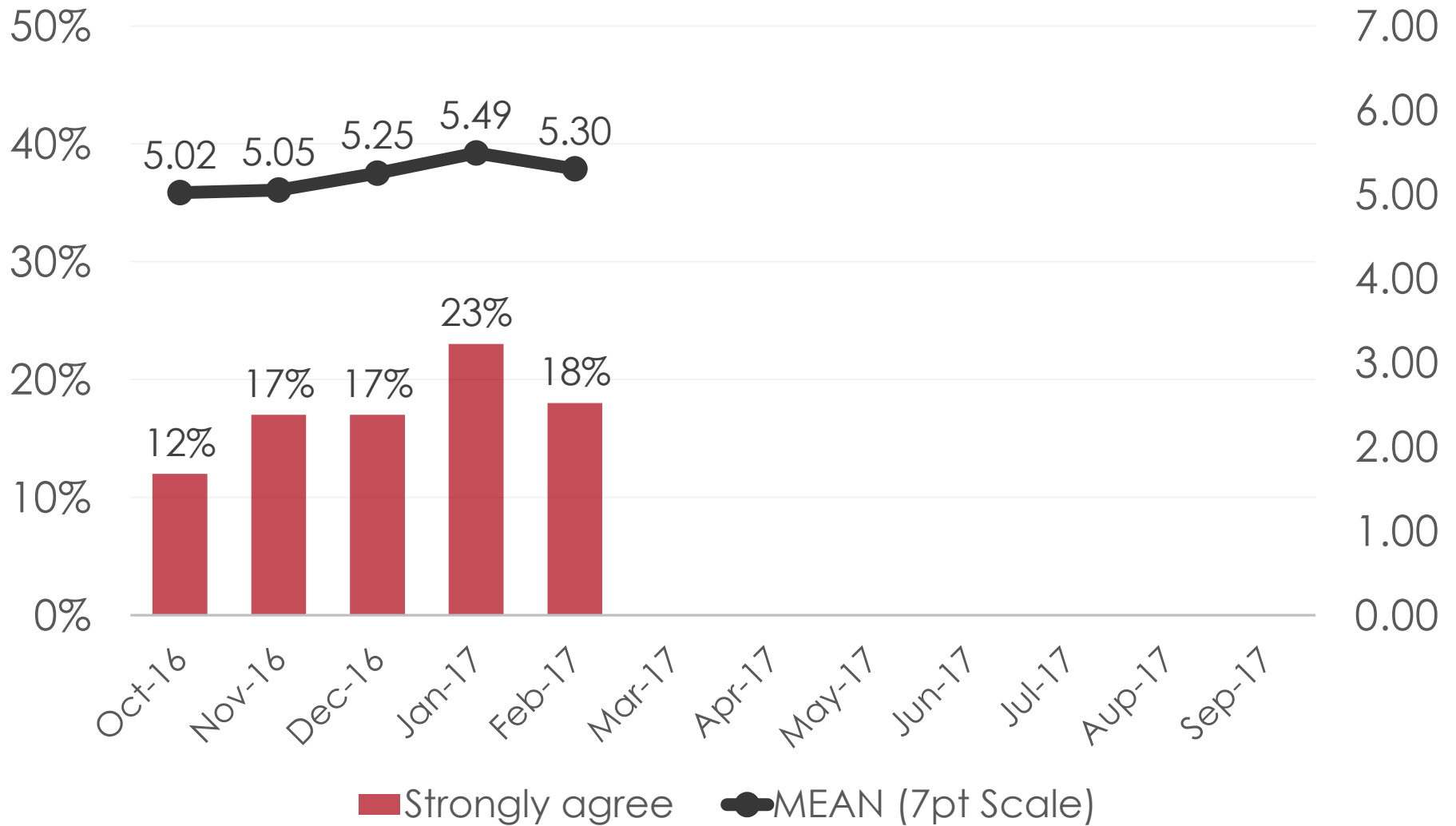
OVERALL SATISFACTION



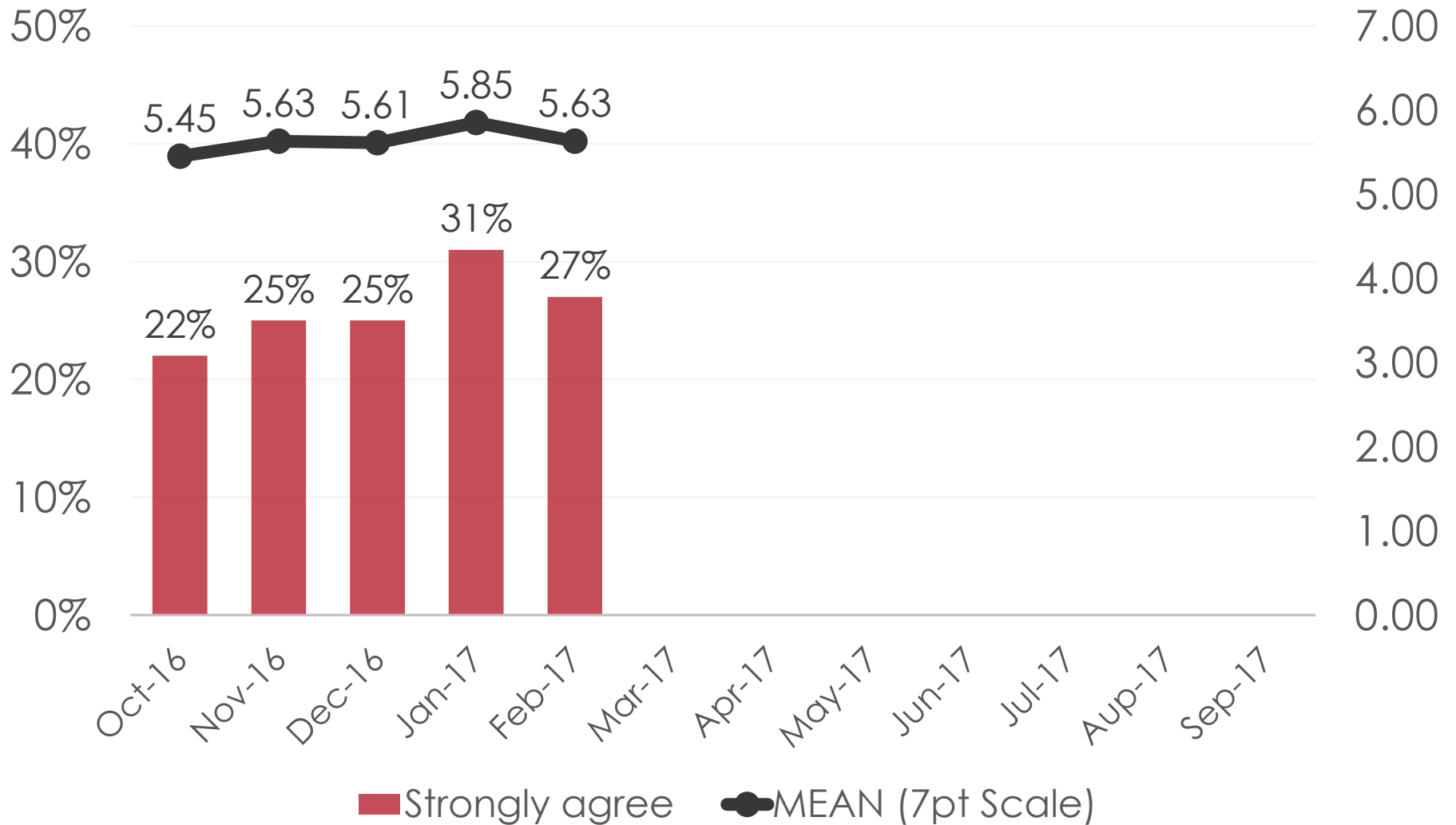
Guam was better than expected



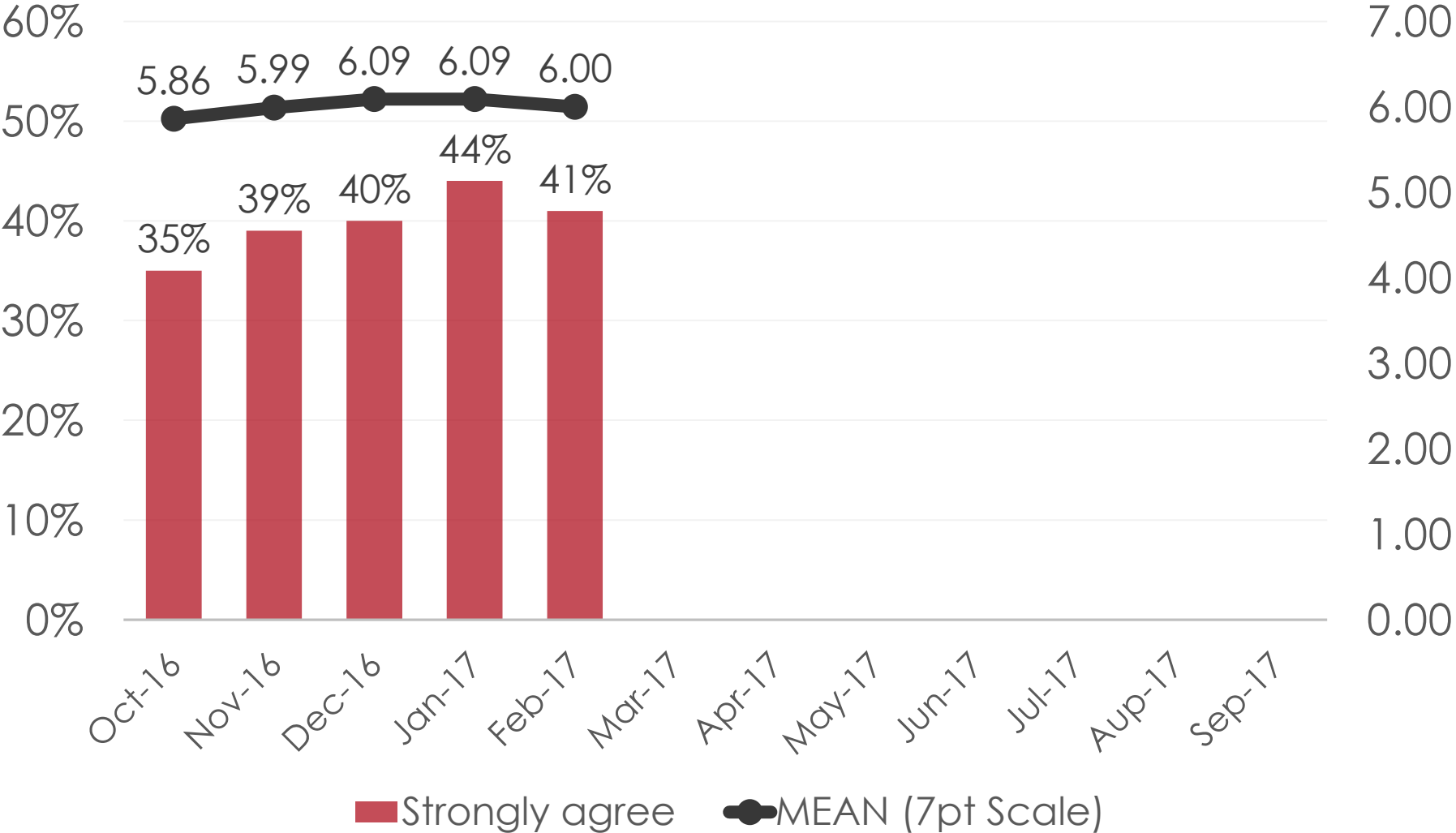
I had no communication problems



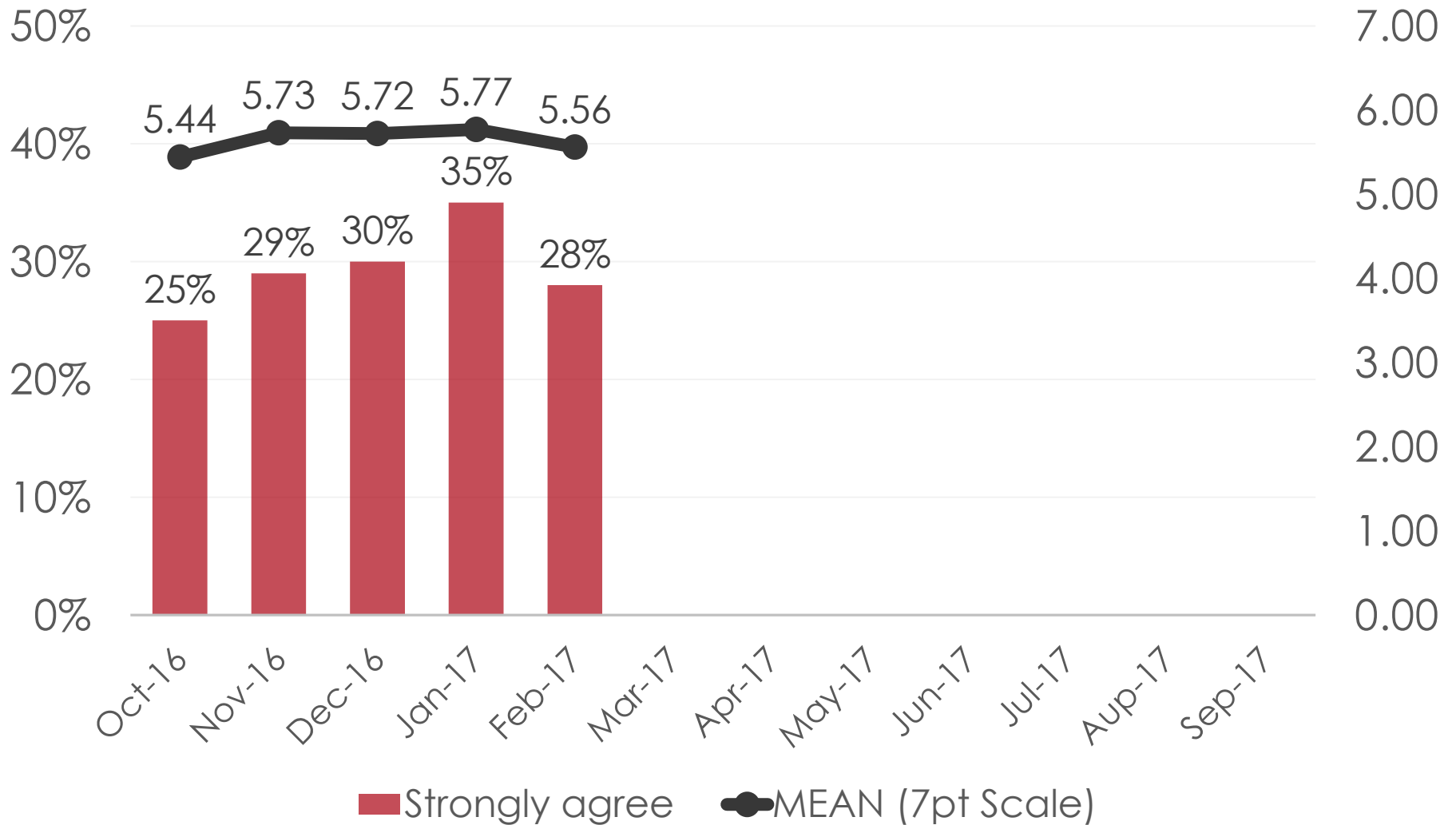
I will recommend Guam to friends



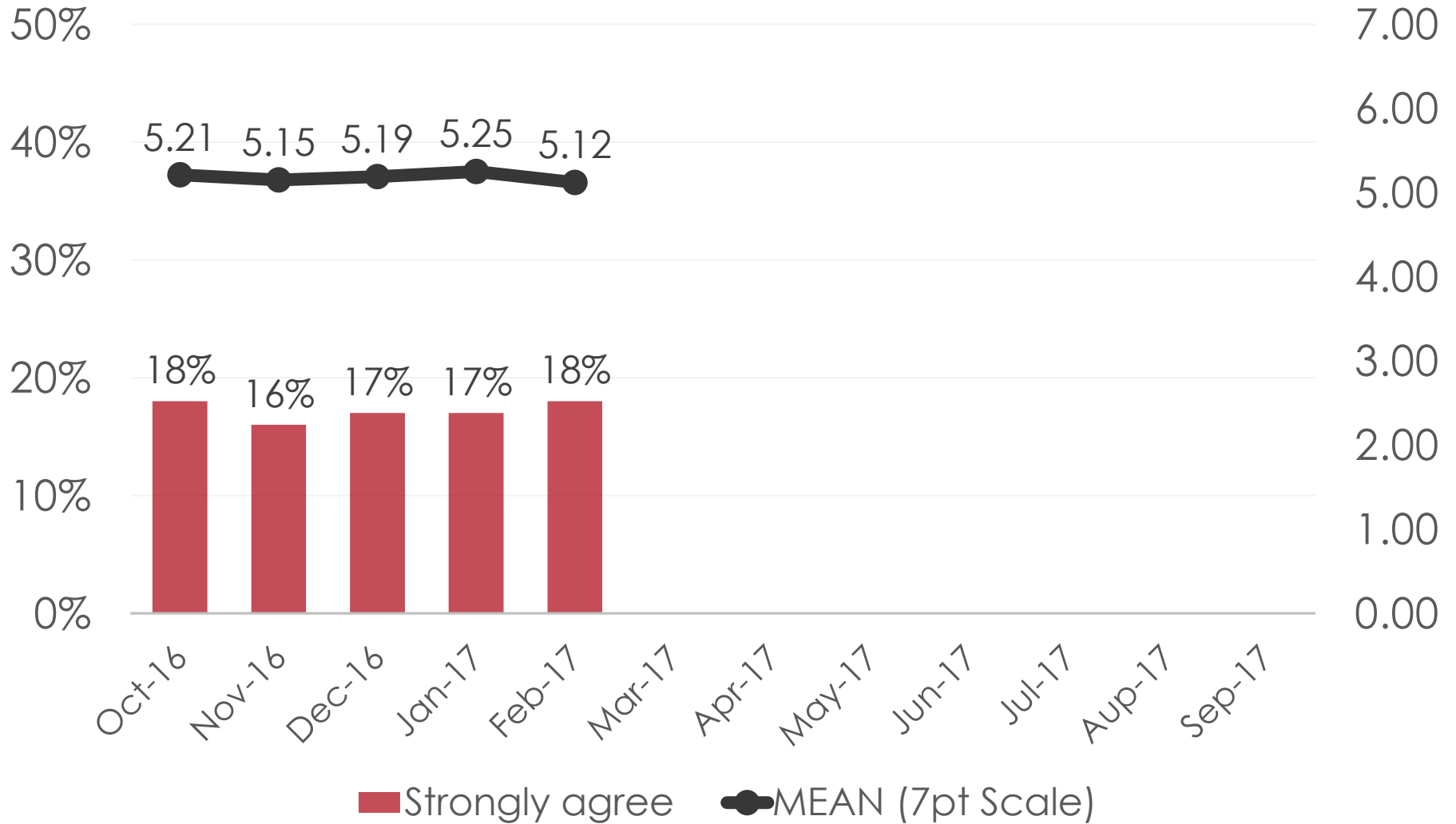
Sites on Guam were attractive



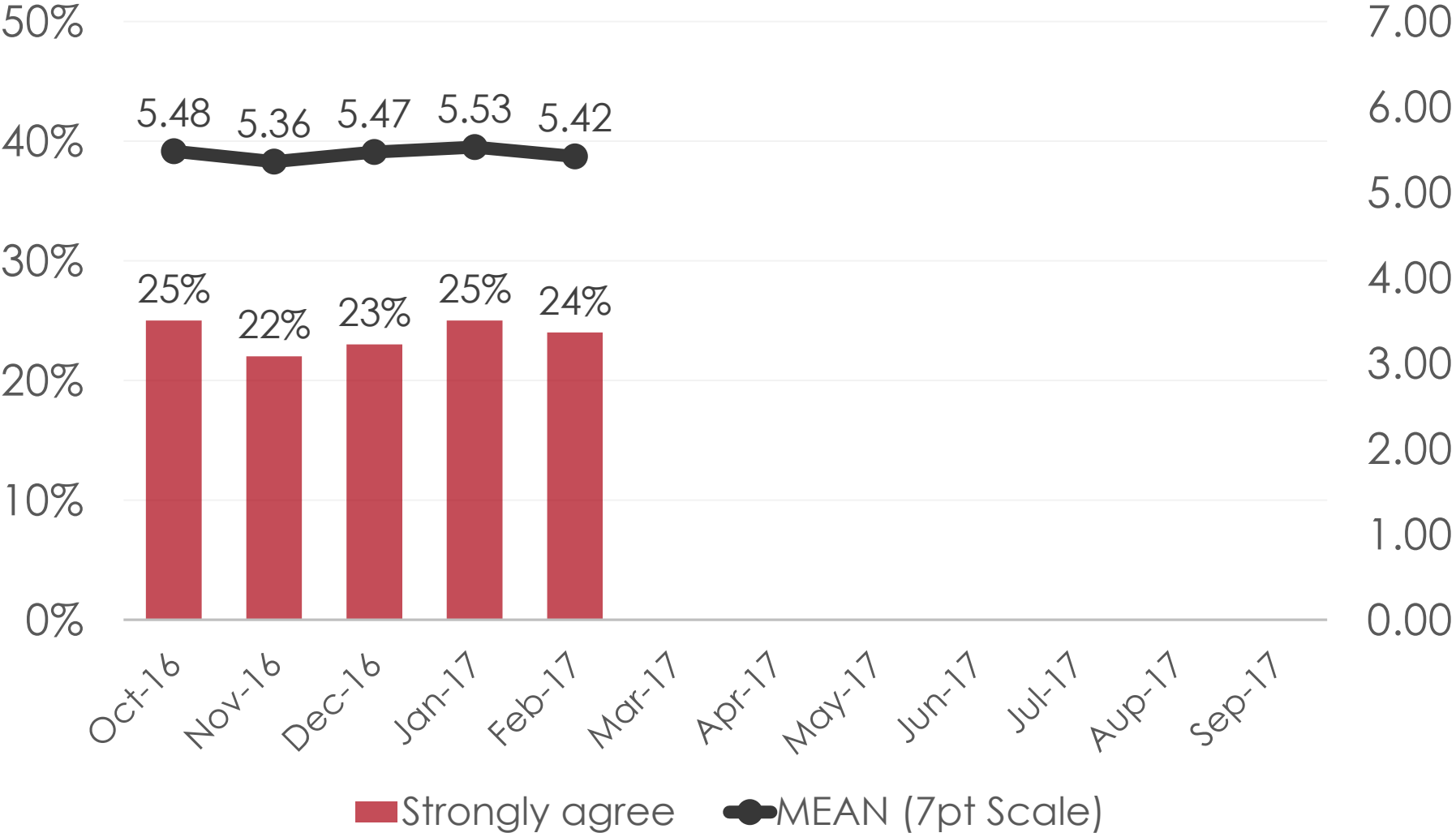
I plan to visit Guam again



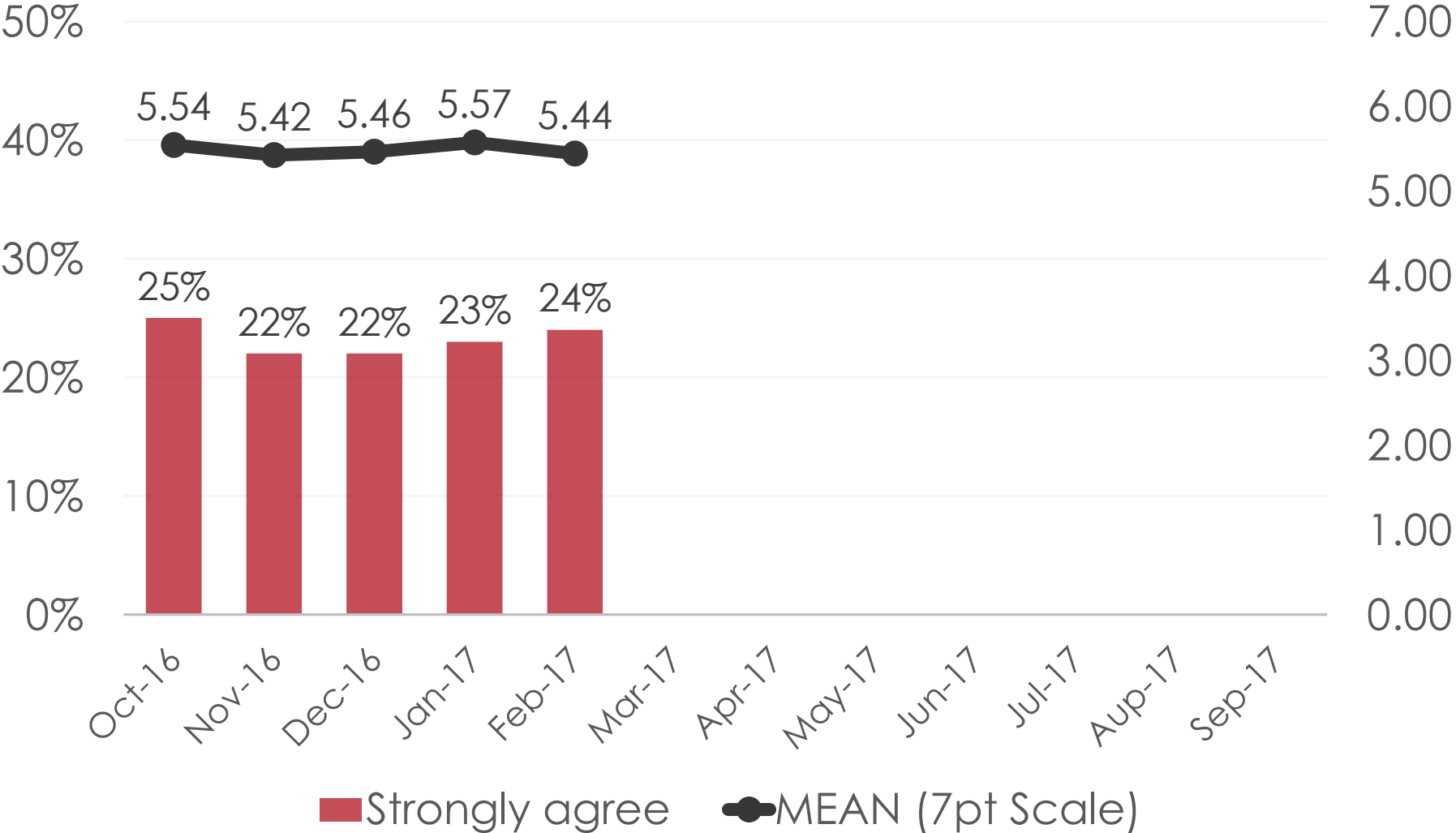
Not enough night time activities



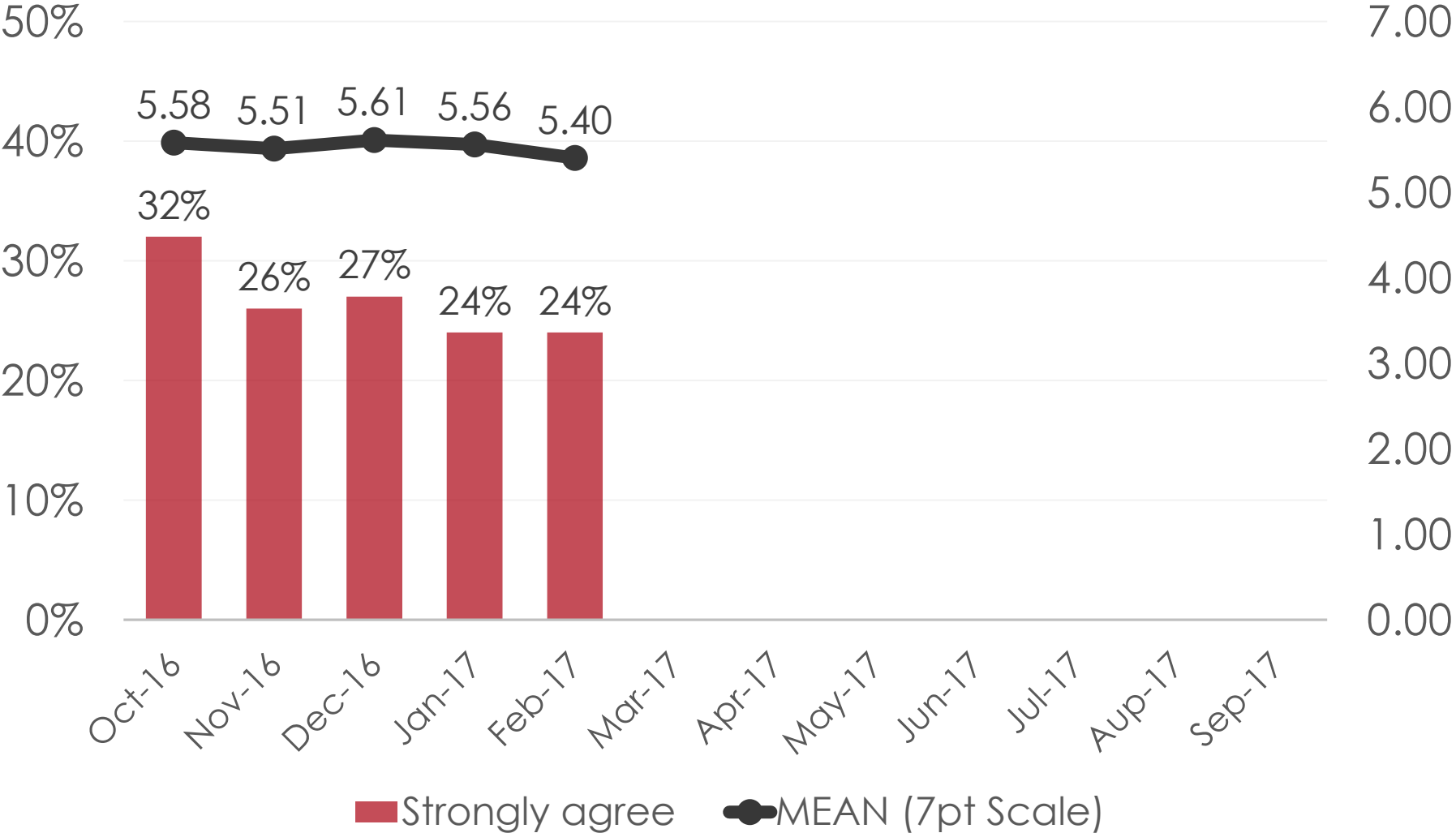
Tour guides were professional



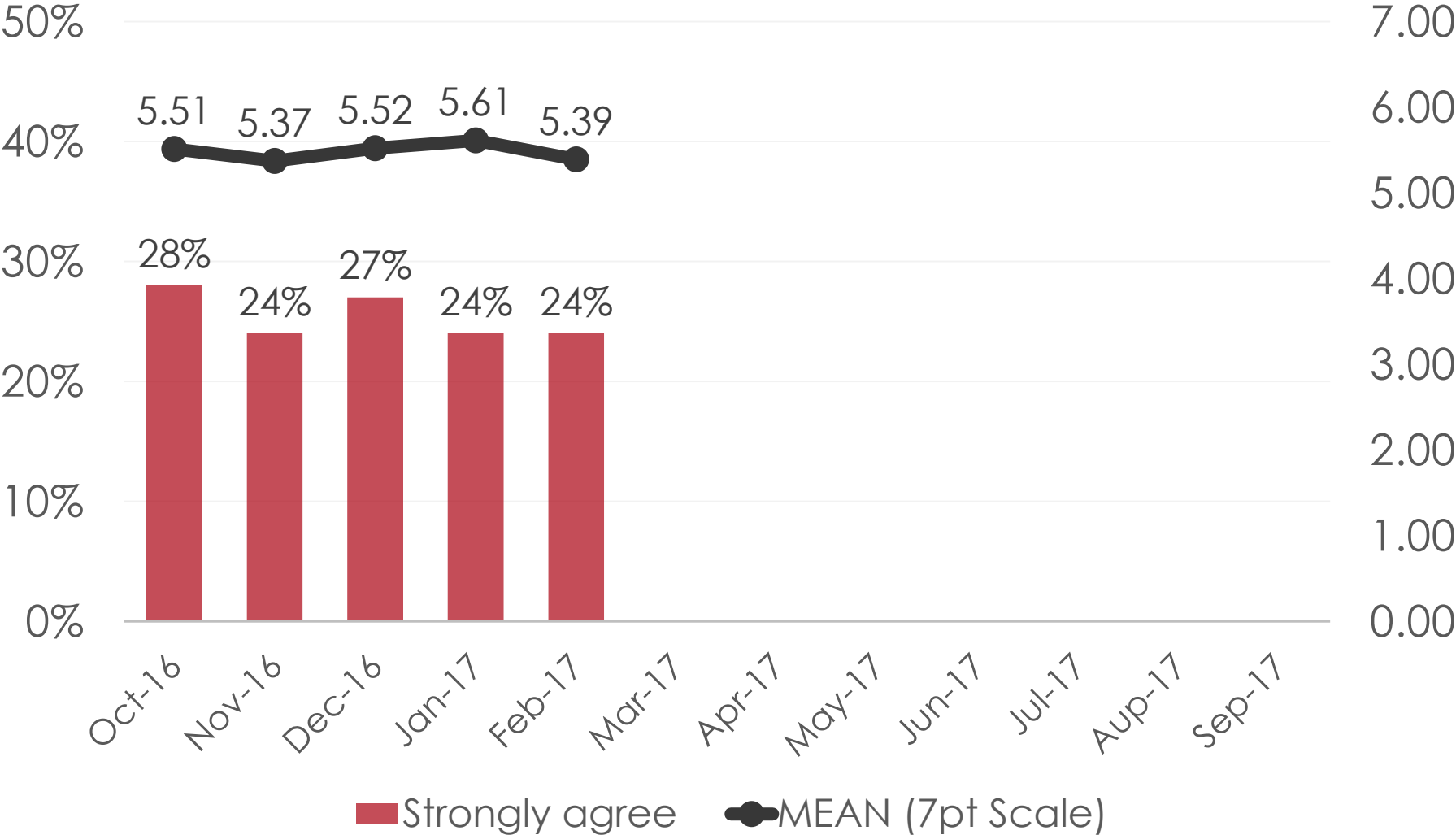
Tour drivers were professional



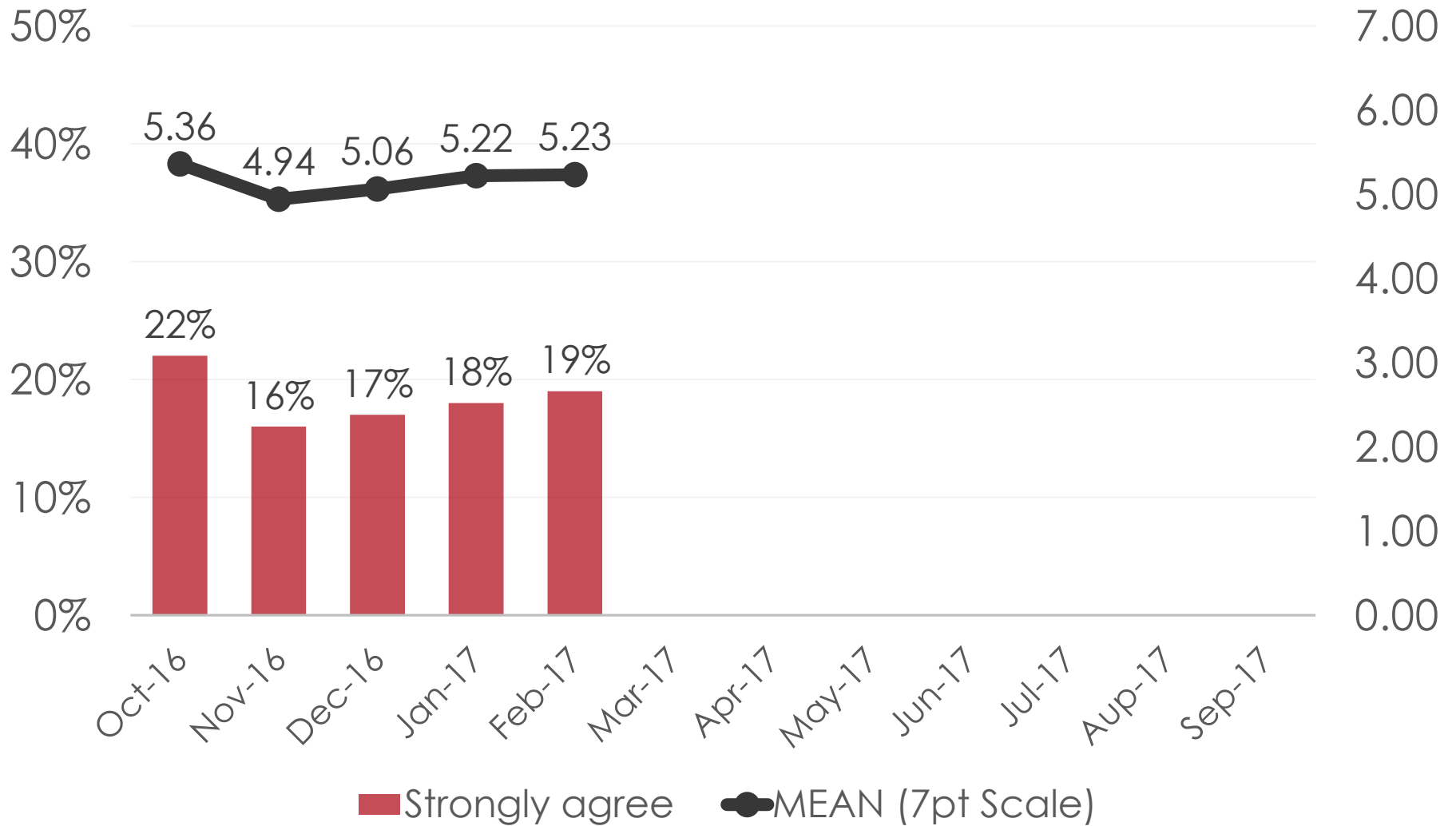
Taxi drivers were professional



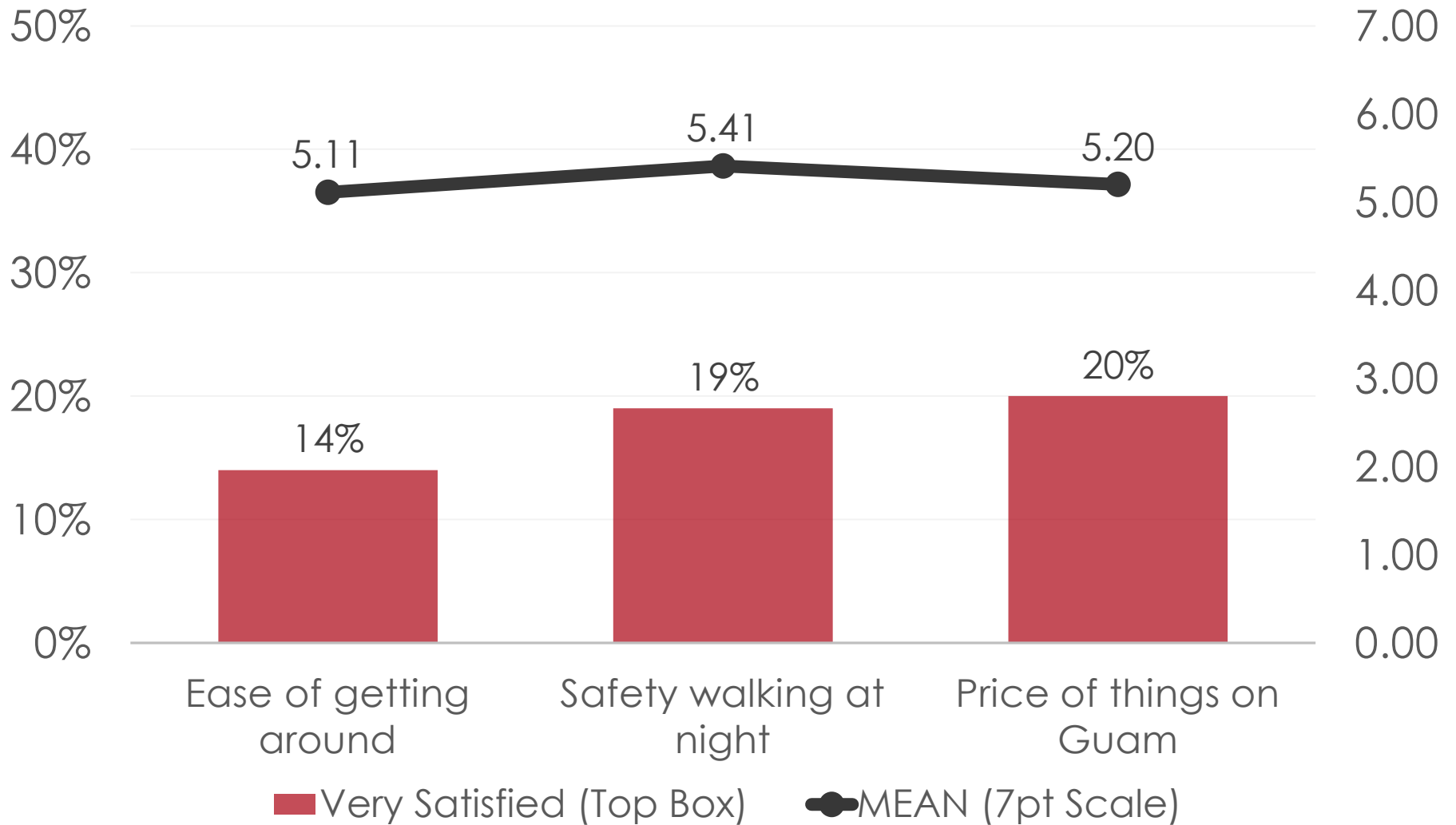
Taxis were clean



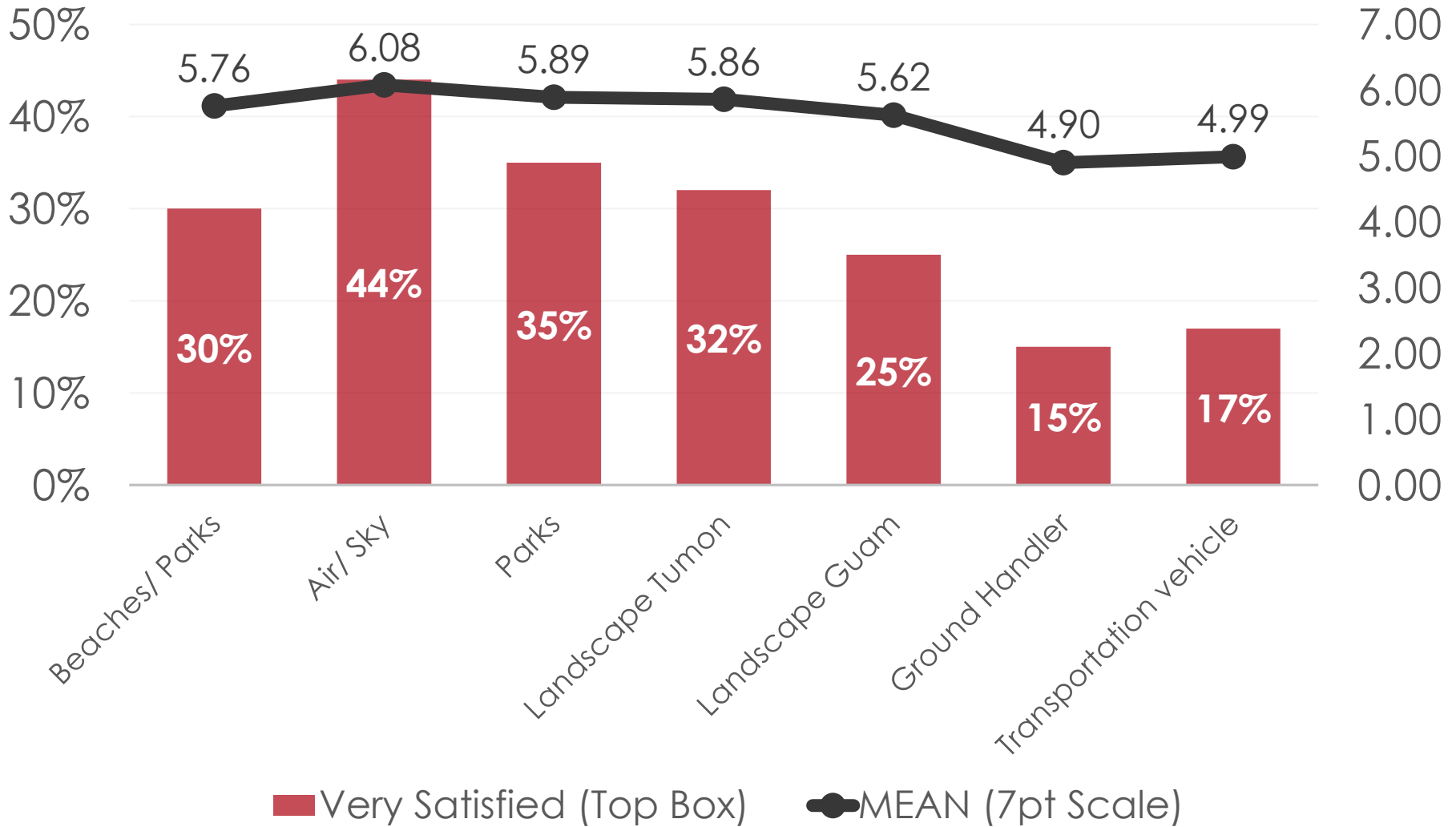
Guam airport was clean



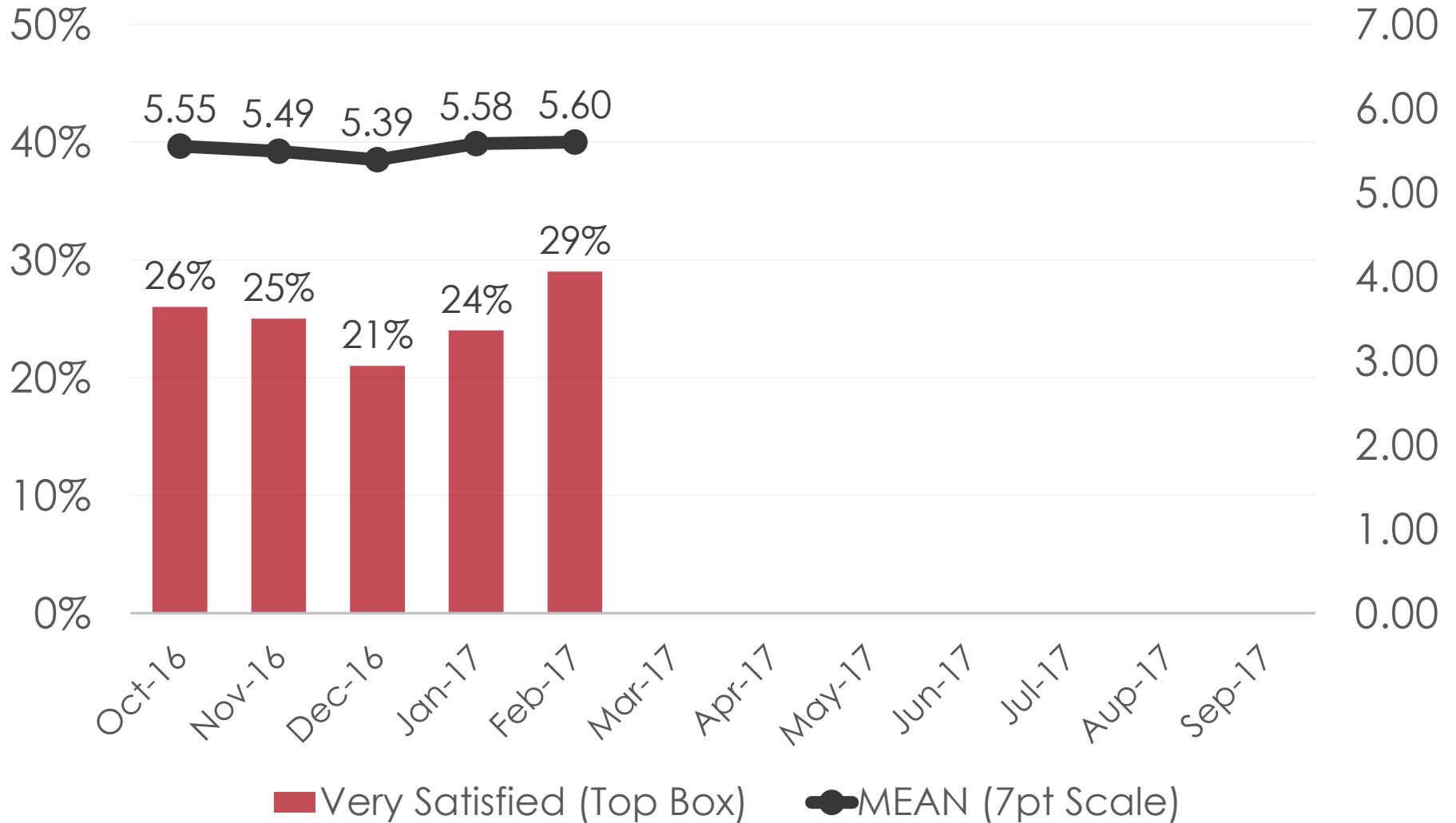
GENERAL SATISFACTION



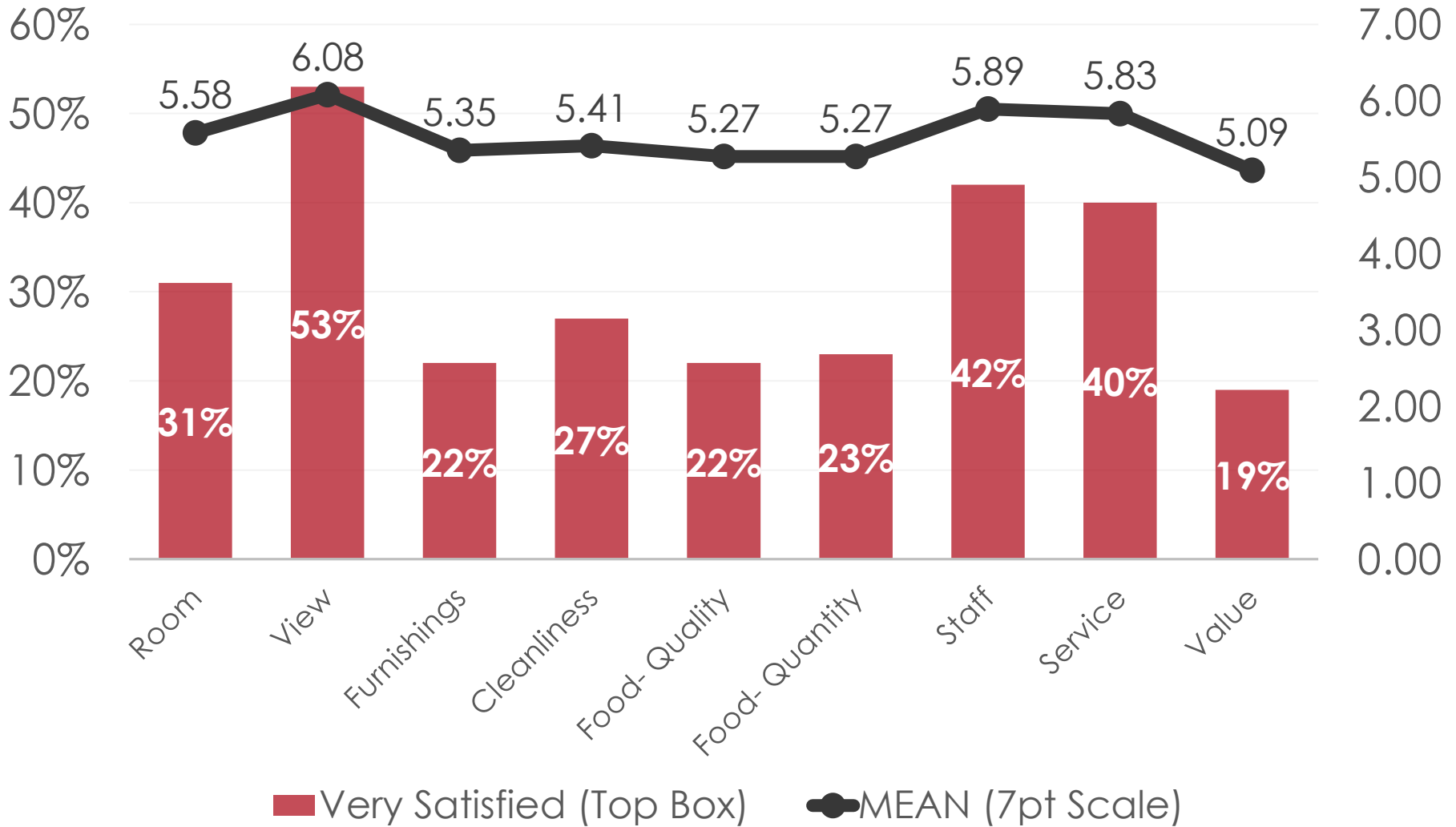
GENERAL SATISFACTION – Quality/ Cleanliness



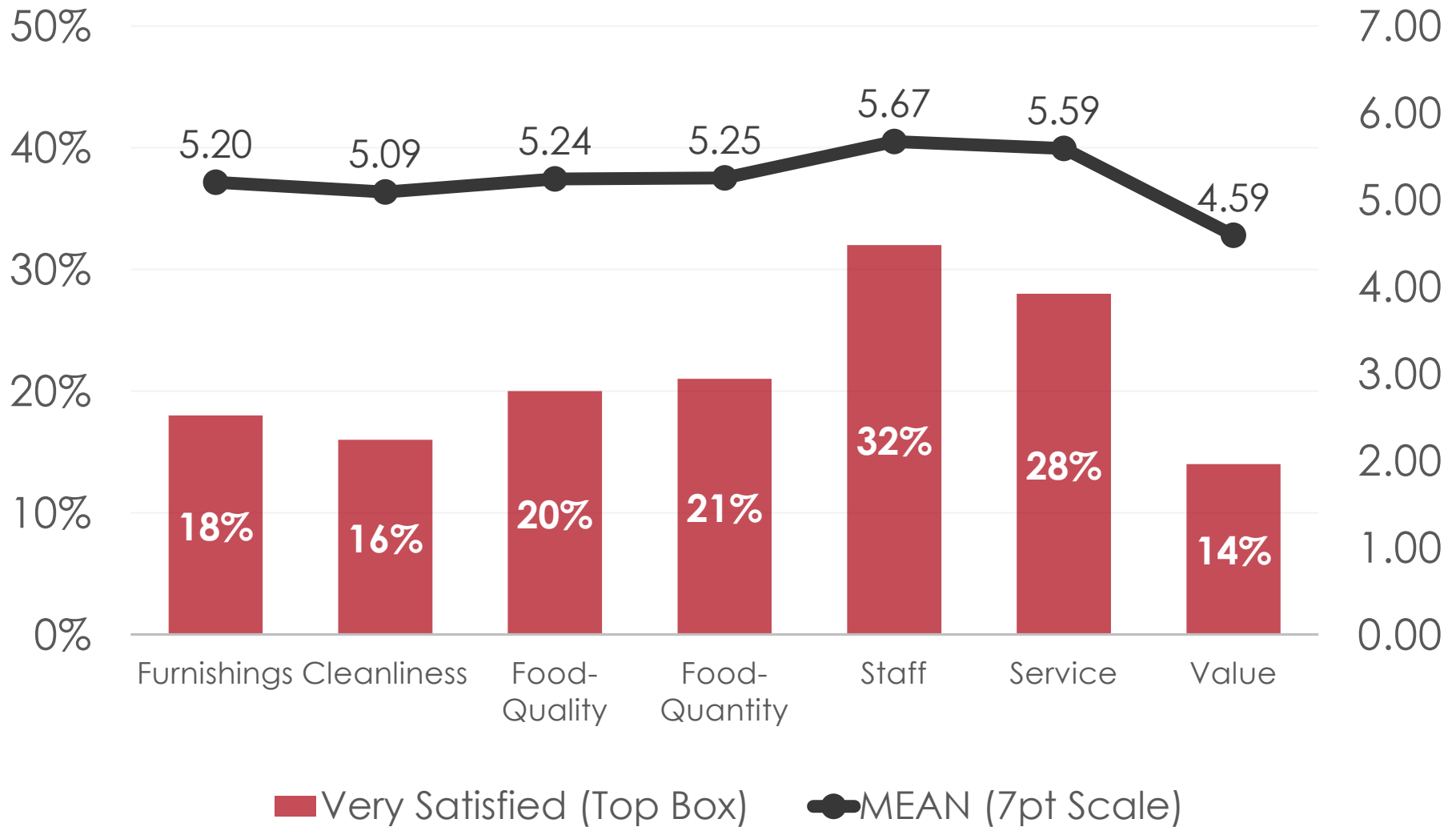
ACCOMMODATIONS – OVERALL SATISFACTION



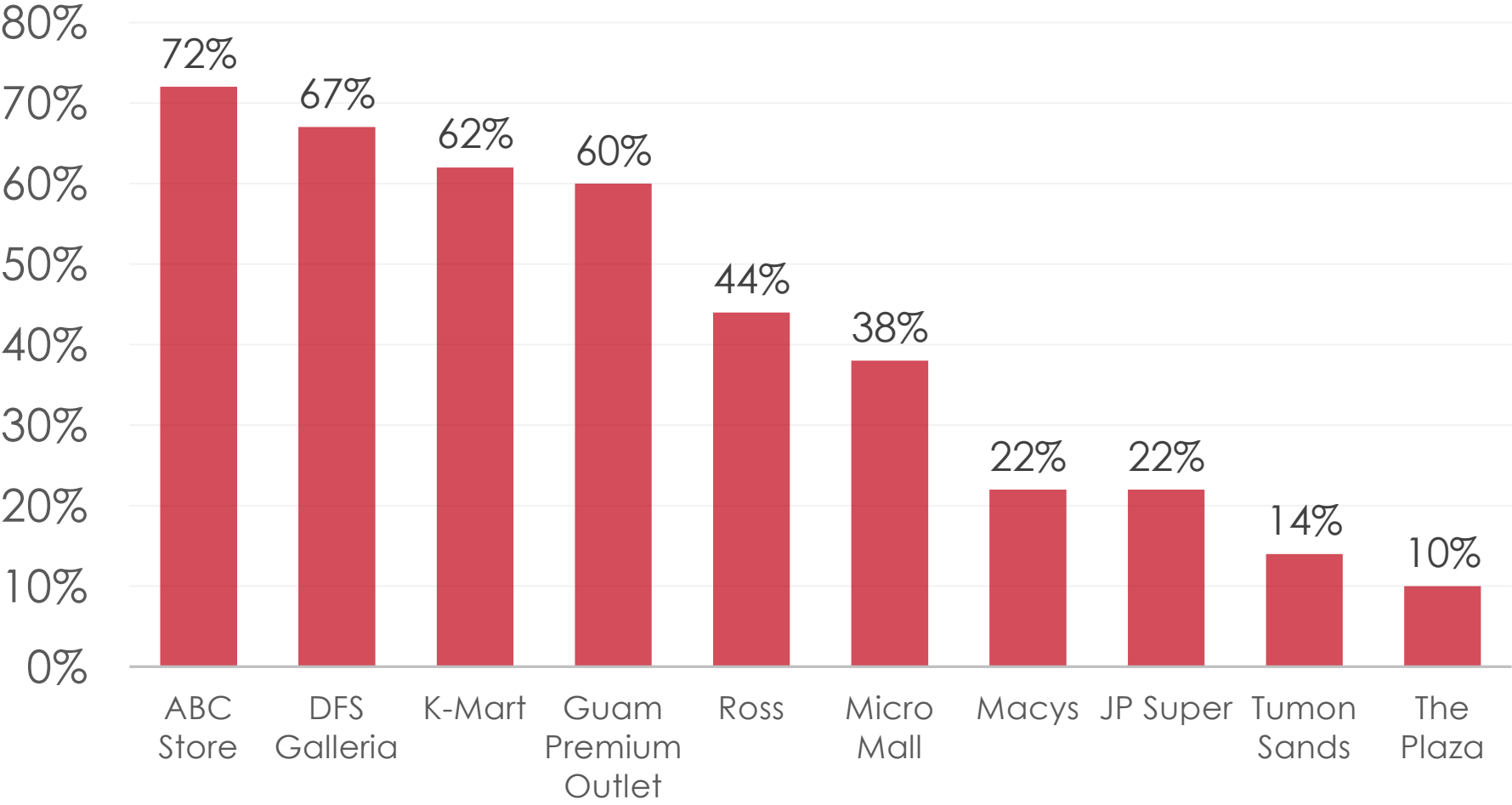
ACCOMMODATIONS – Satisfaction by Category



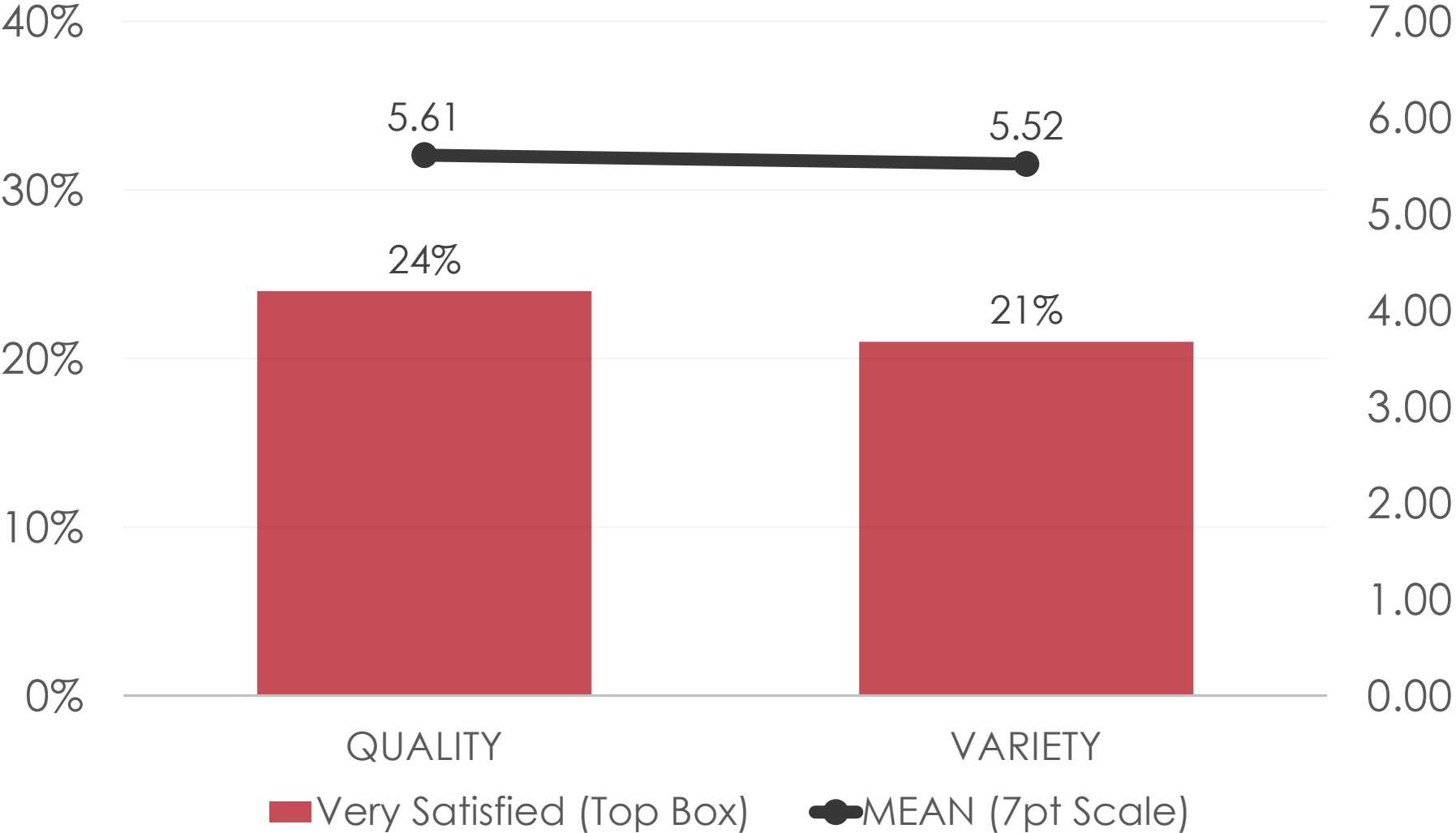
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



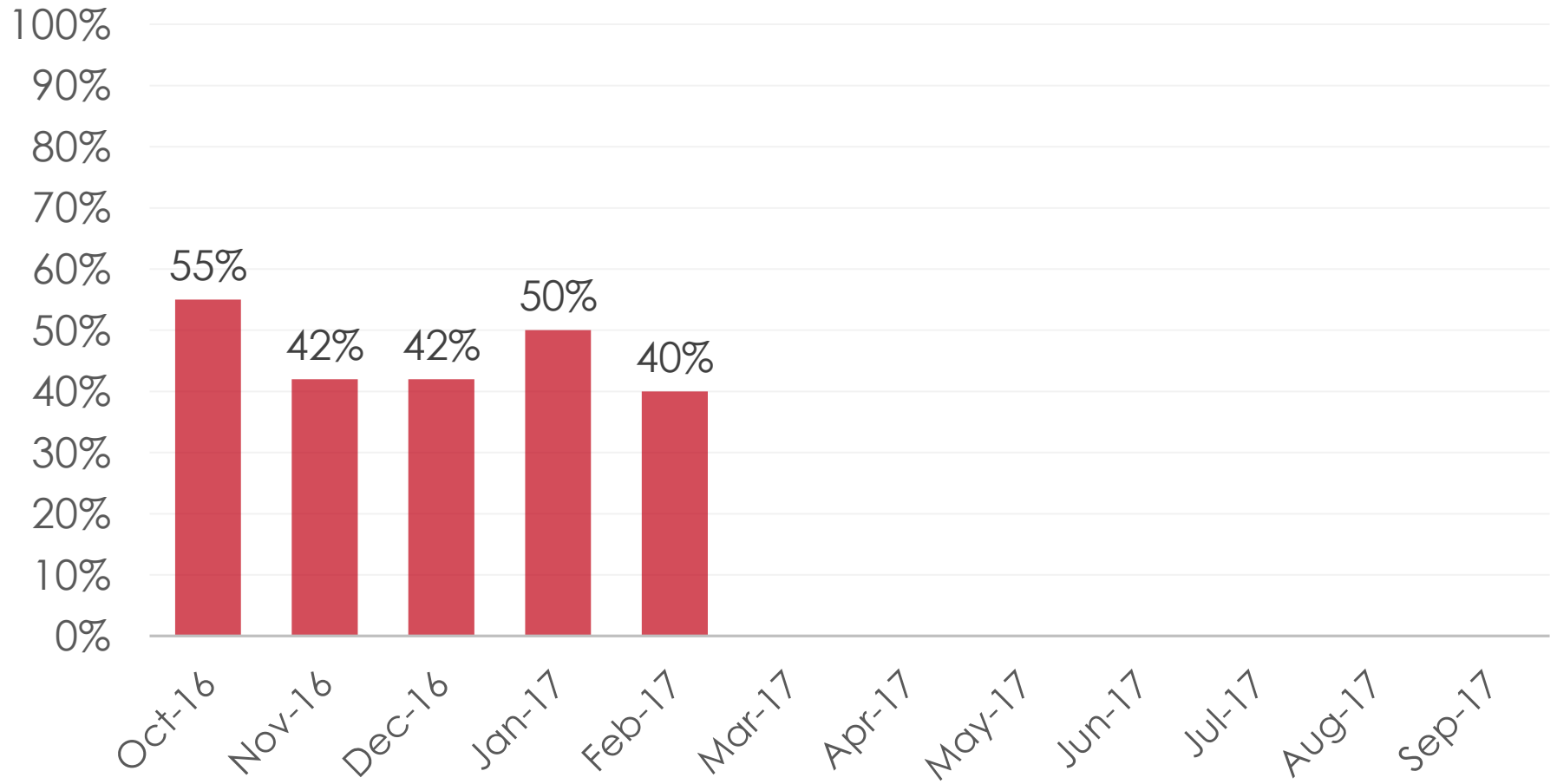
Shopping Malls/ Stores (Top Responses)



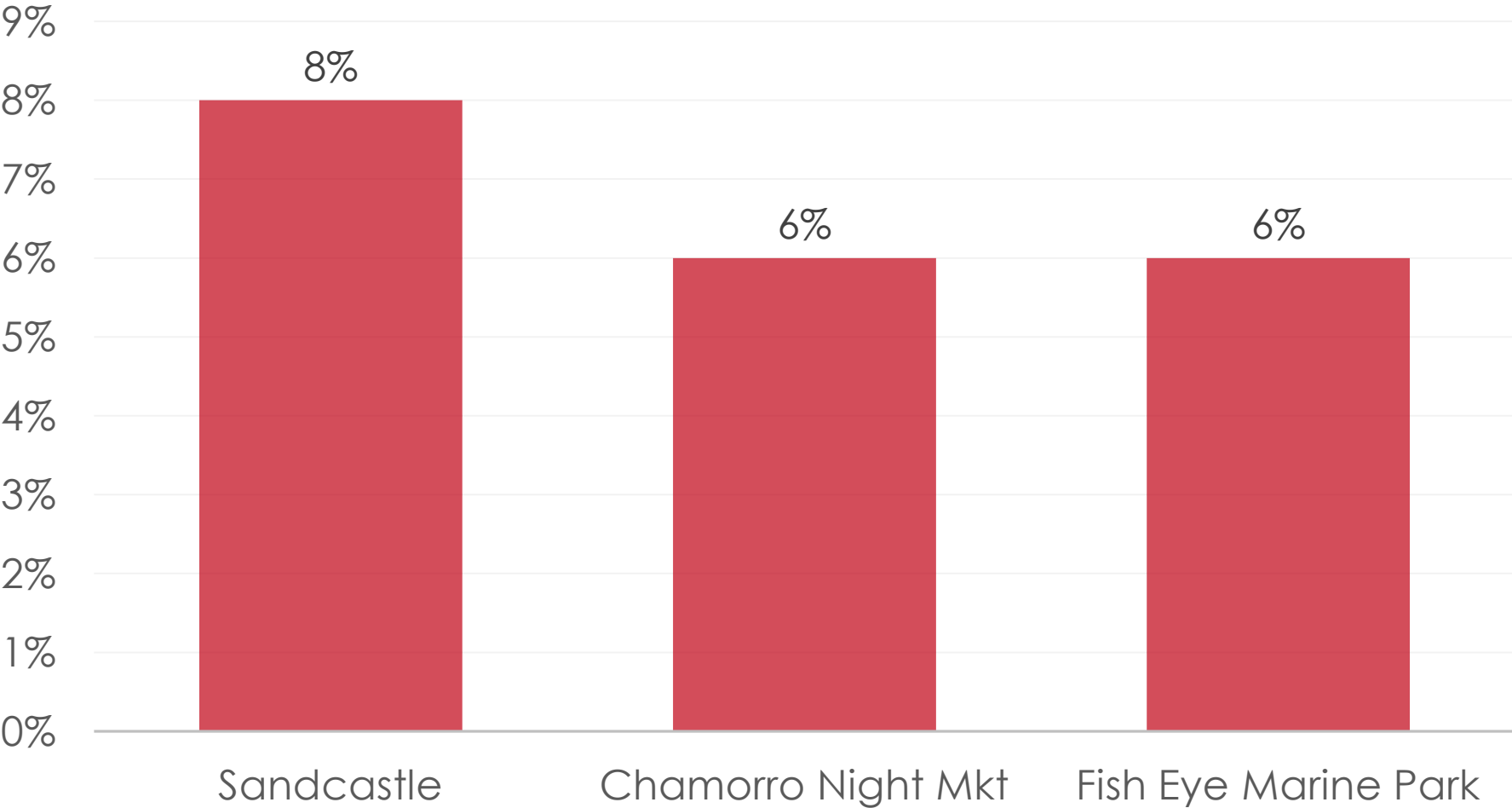
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

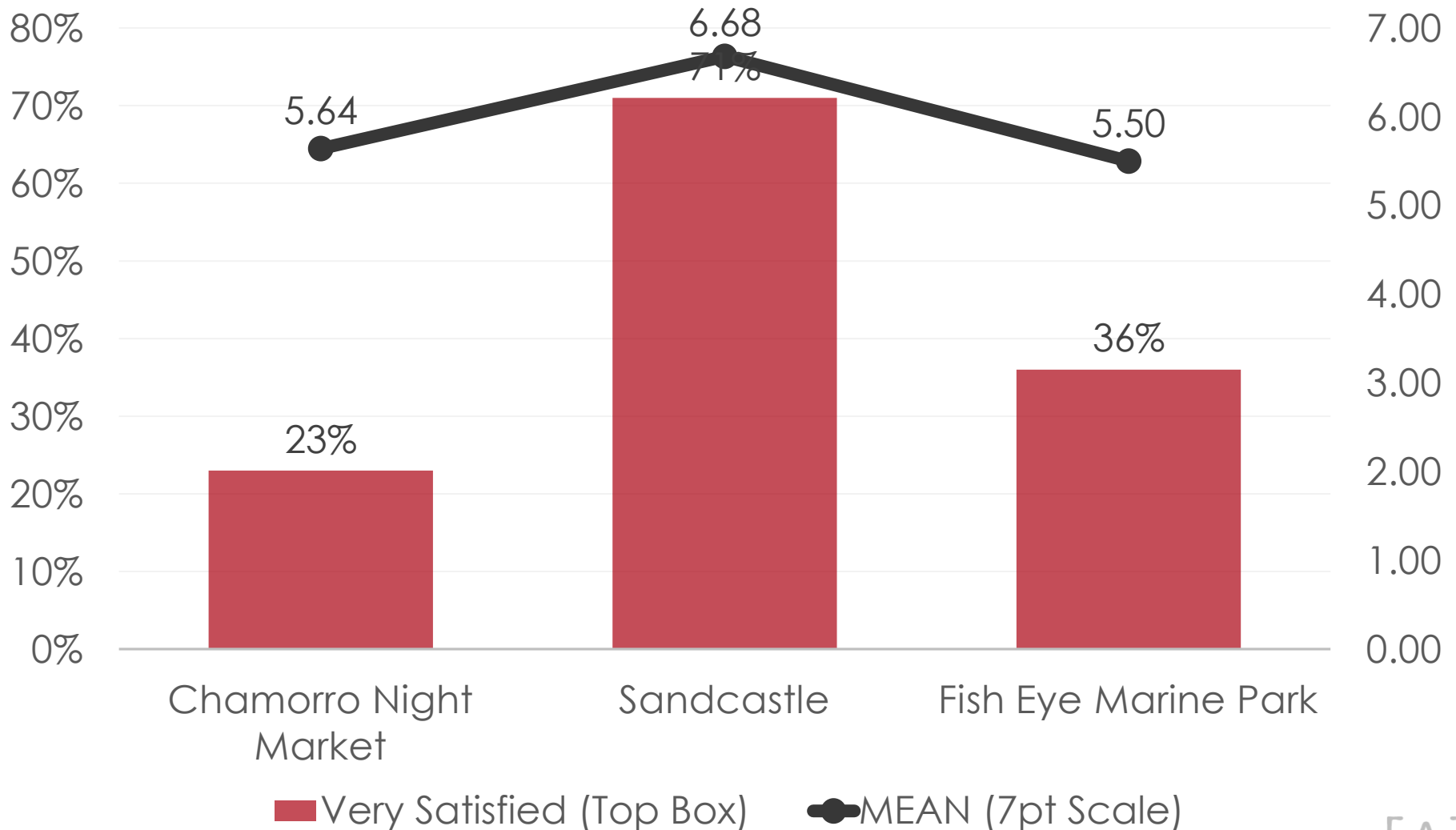


Optional Tour Participation (Top Responses)

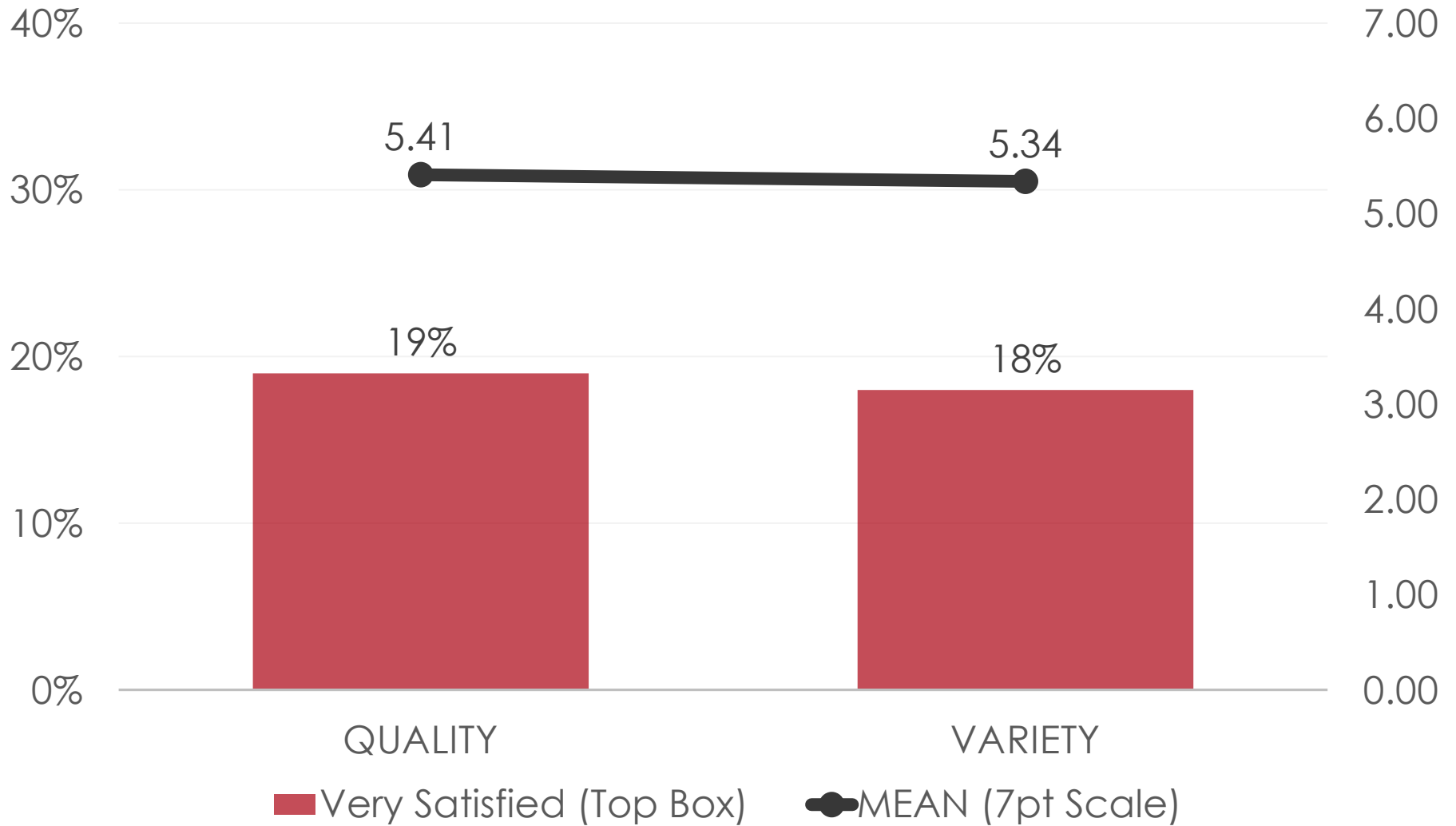


Optional Tour Satisfaction

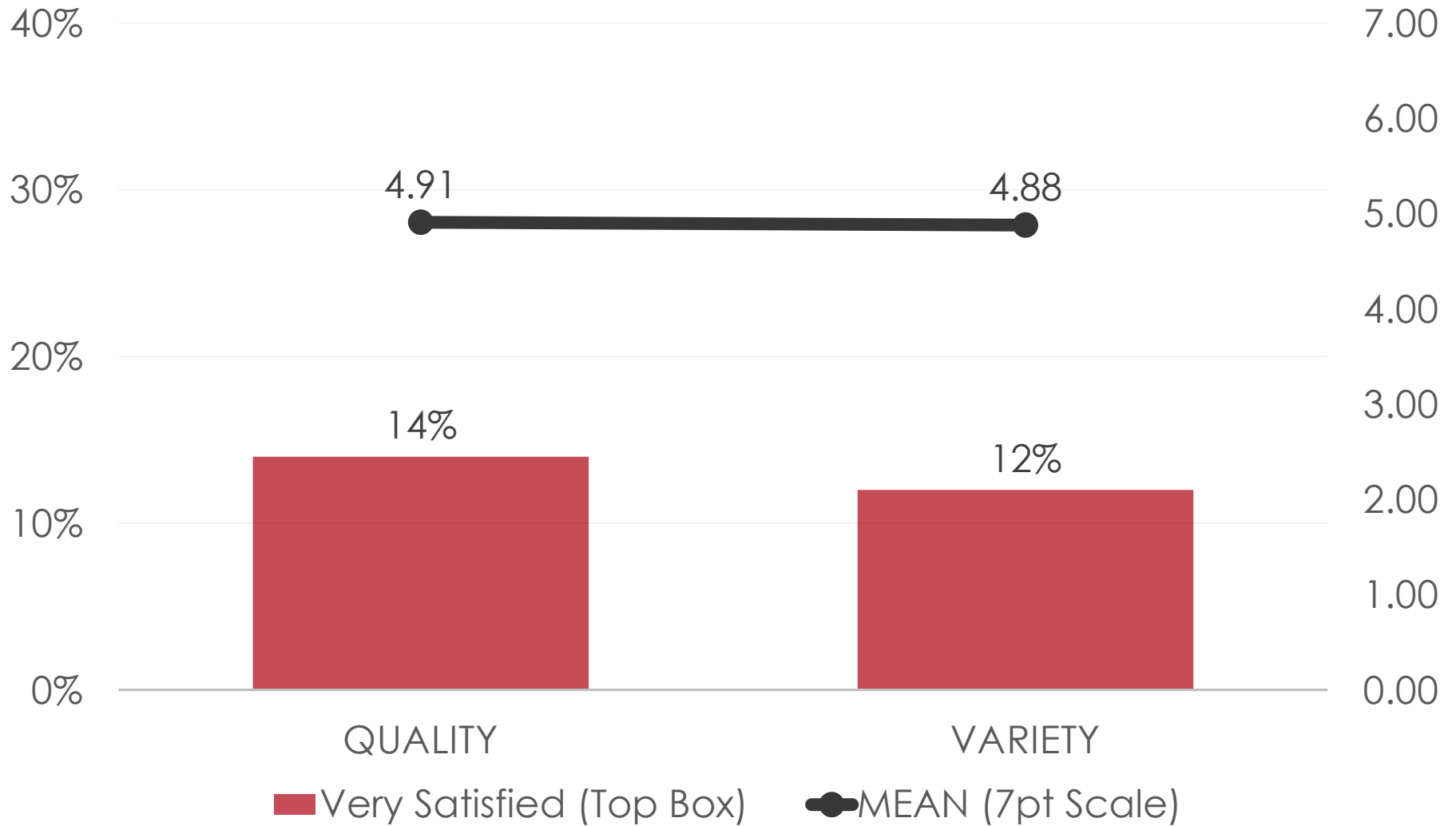
Top Responses only - Participation (5%+)



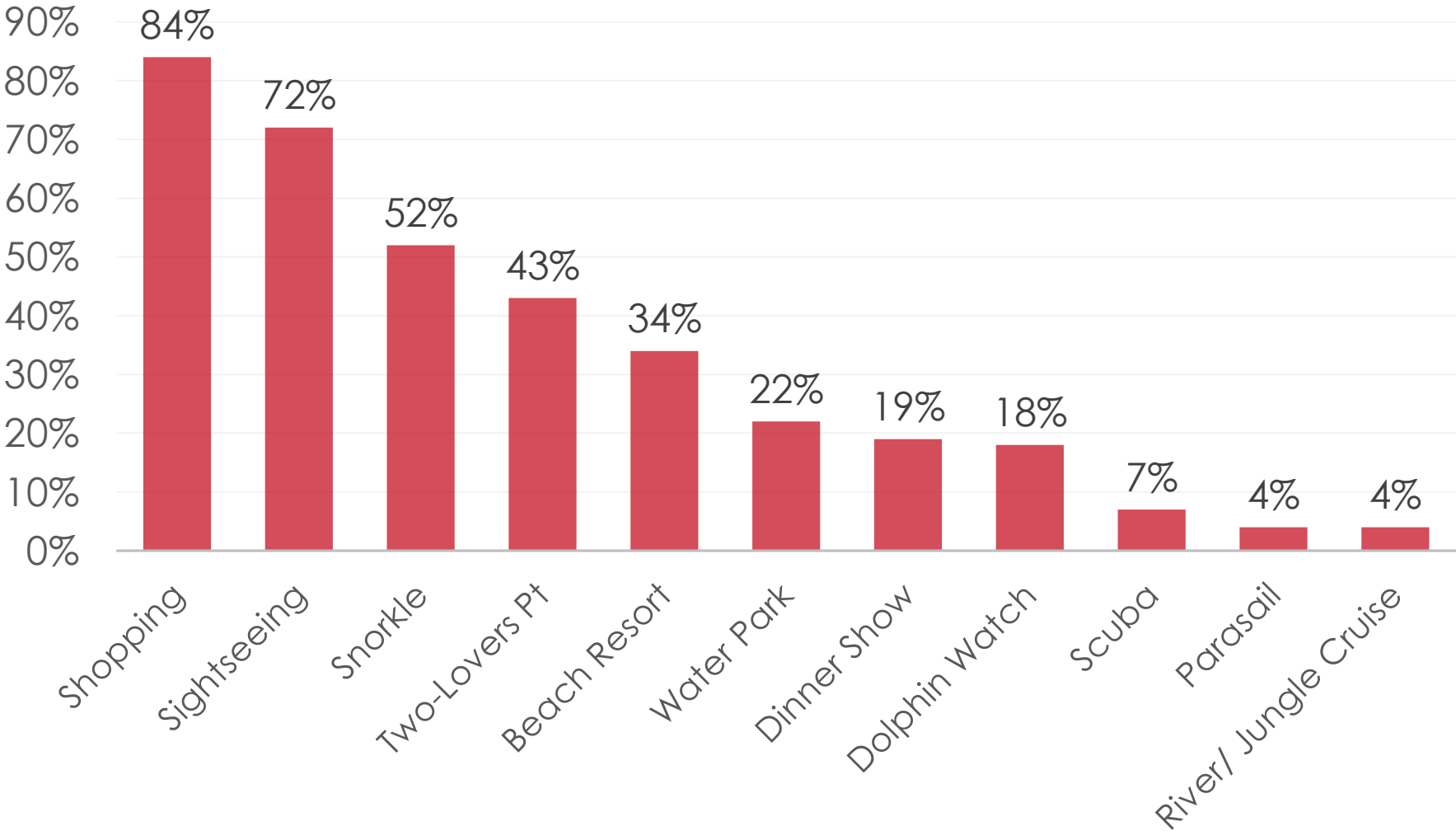
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

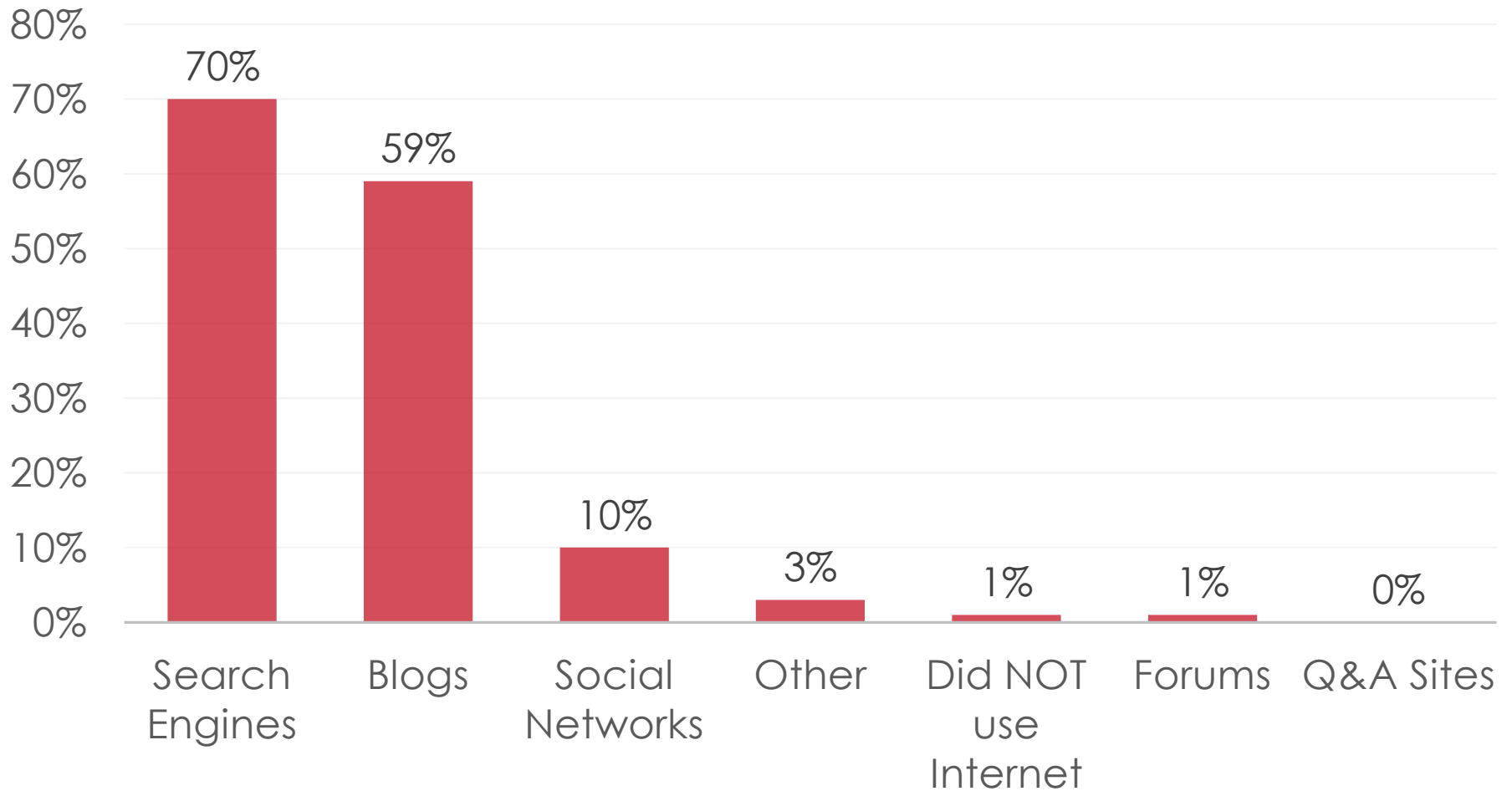


Activities Participation (Top Responses)



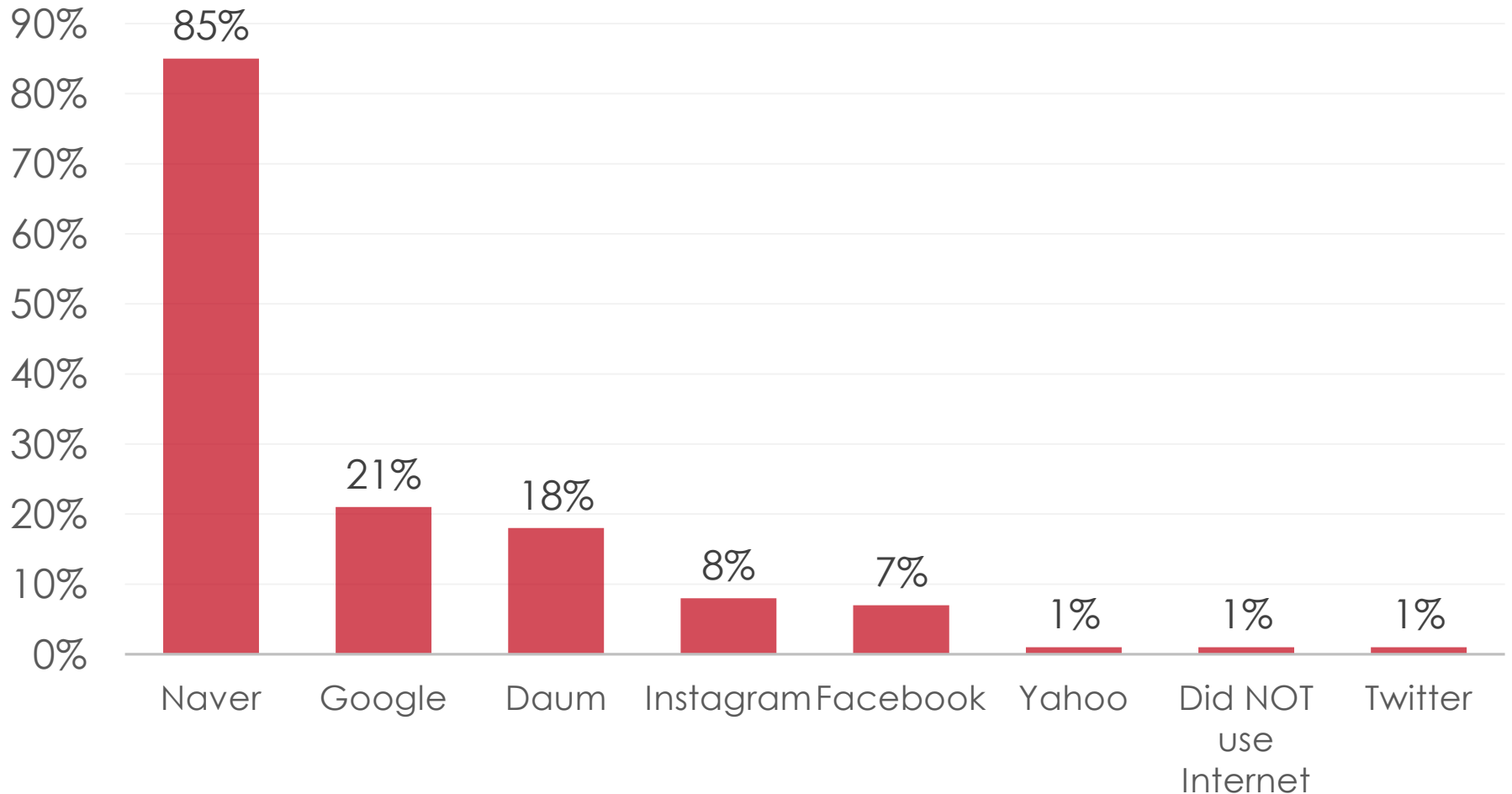
SECTION 5 PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



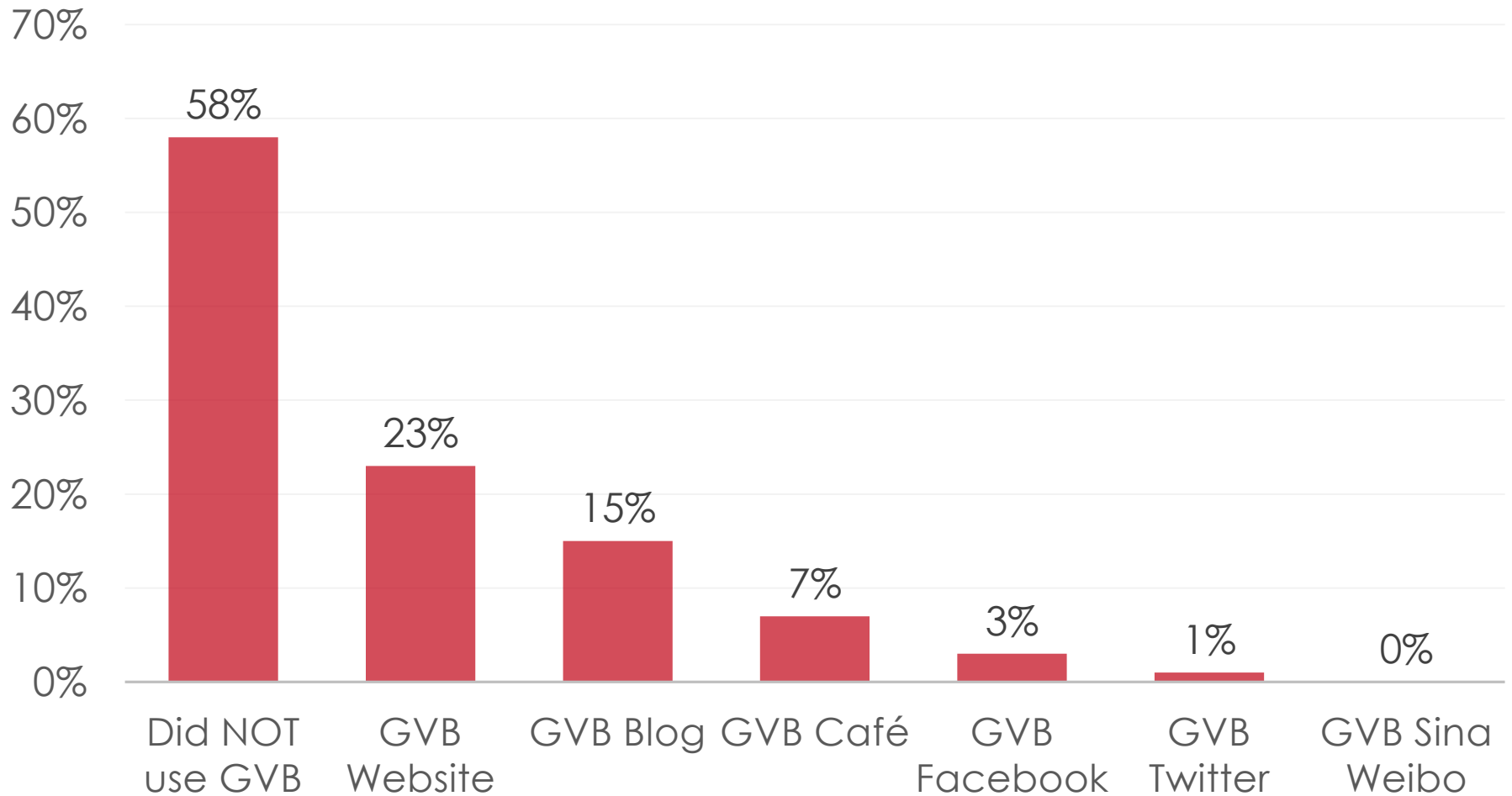
INTERNET- SOURCES OF INFORMATION

Things to do on Guam

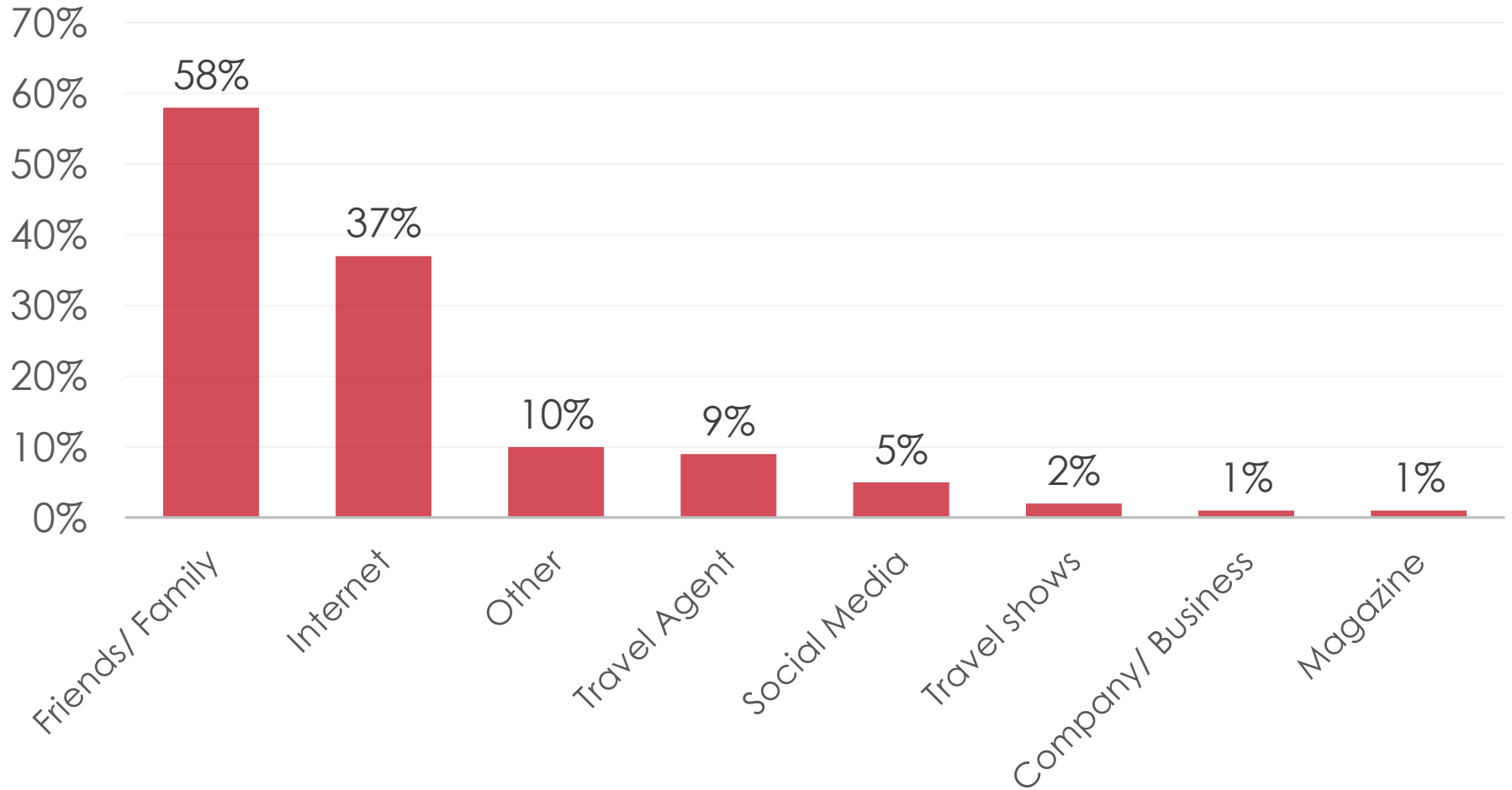


INTERNET- SOURCES OF INFORMATION

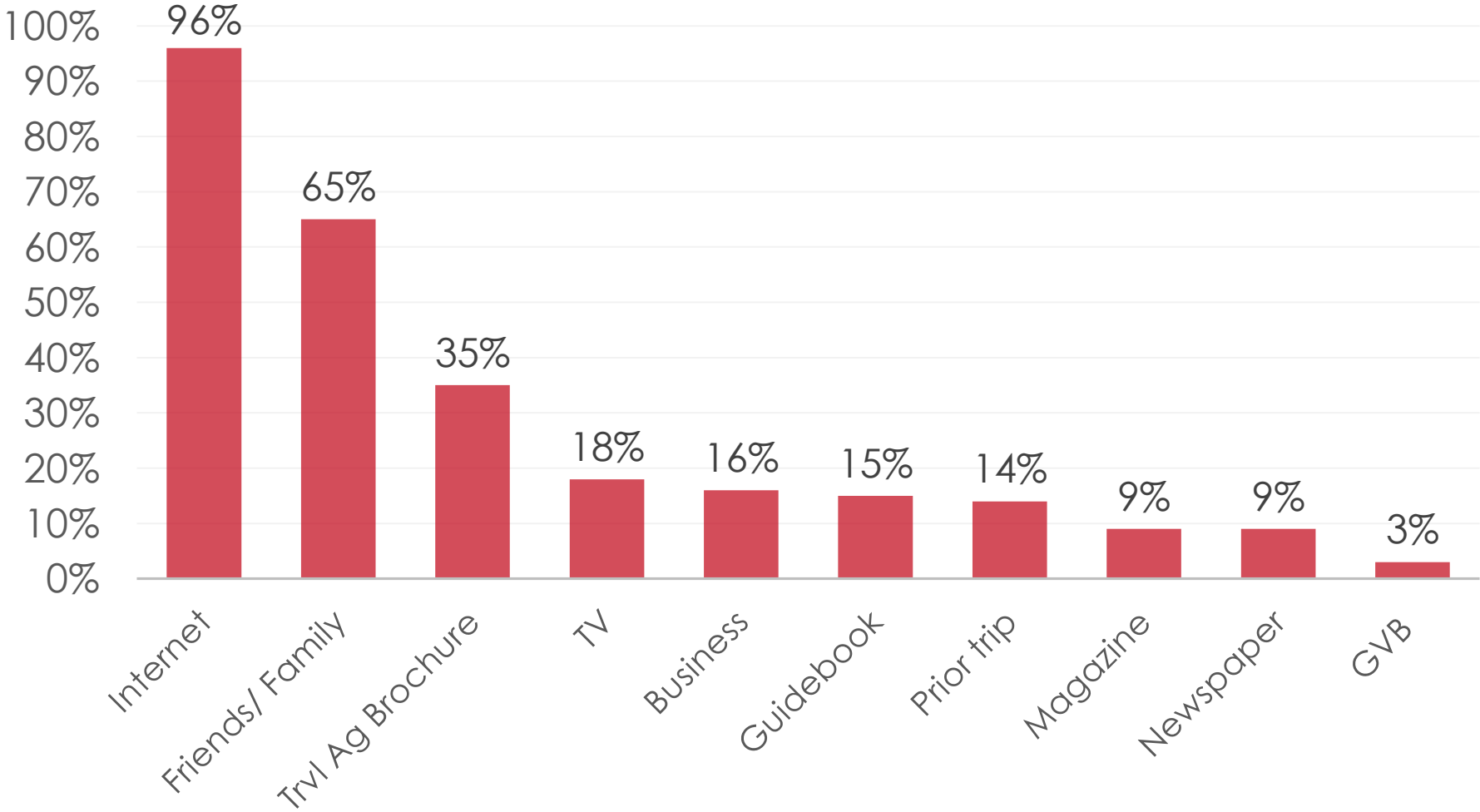
GVB



TRAVEL MOTIVATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

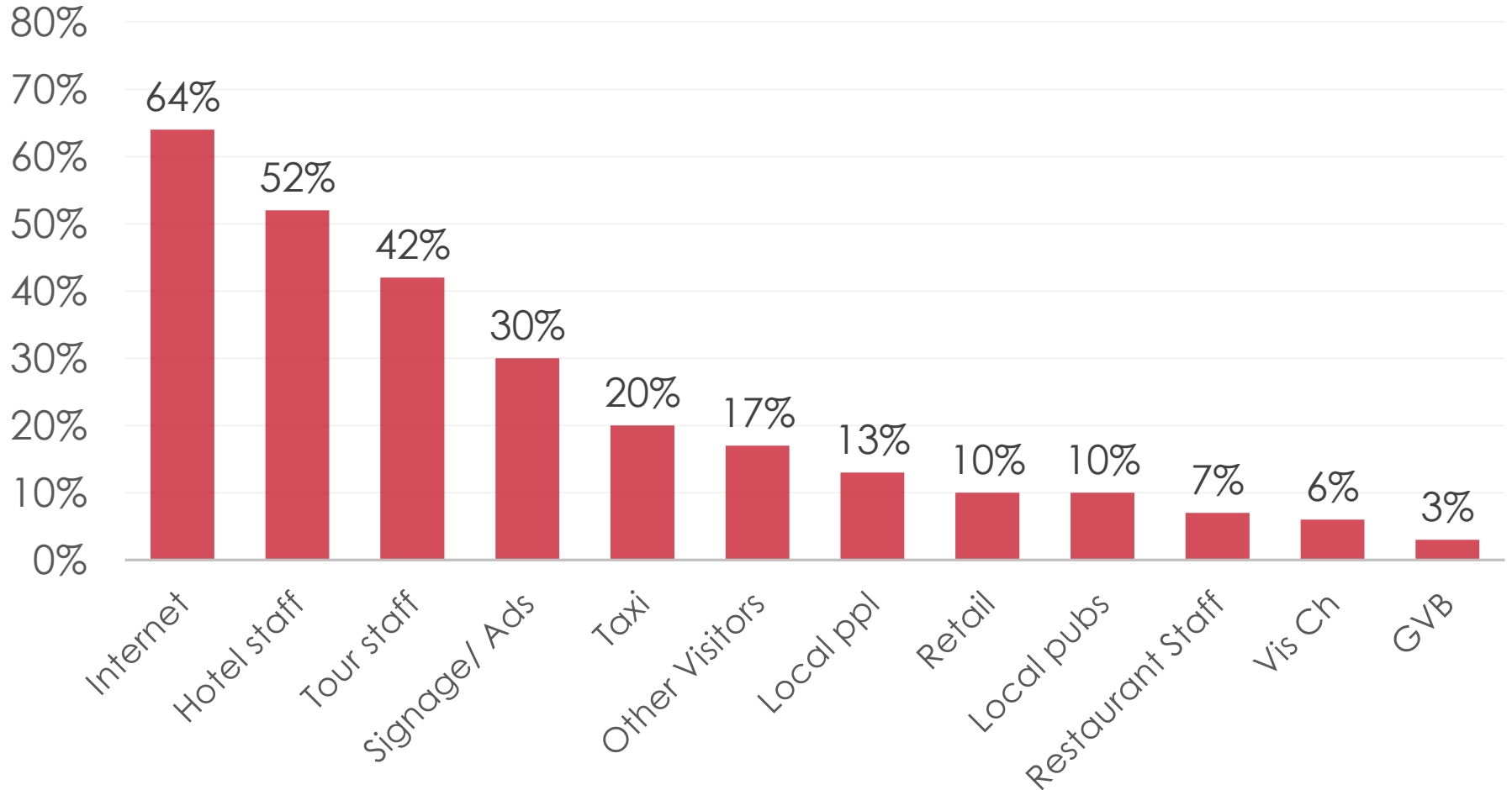
Q1 Please select the top 3 sources of information you used to find out about Guam before you trip.

| | | TOTAL | FIT | MICE | HONEY- MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|----|---------------------------------|-------|-----|------|----------------|---------|---------------------|--------|---------------|-------------------|
| | | - | - | - | - | - | - | - | - | - |
| Q1 | Internet | 96% | 96% | 100% | 100% | 100% | 97% | 97% | 88% | 93% |
| | Friend/ Relative | 65% | 65% | | 65% | | 66% | 64% | 25% | 48% |
| | Travel Agent Brochure | 35% | 22% | 33% | 35% | 100% | 36% | 36% | 50% | 21% |
| | TV | 18% | 17% | | 6% | | 19% | 17% | 25% | 16% |
| | Co-Worker/ Company Trvl Dept | 16% | 17% | 100% | 6% | 100% | 15% | 15% | 25% | 9% |
| | Travel Guidebook- Bookstore | 15% | 15% | | 29% | | 15% | 16% | 13% | 9% |
| | Prior Trip | 14% | 17% | 33% | 6% | | 12% | 13% | 13% | 88% |
| | Newspaper | 9% | 4% | | 6% | | 9% | 8% | 13% | 4% |
| | Magazine (Consumer) | 9% | 9% | | 6% | | 9% | 9% | | 7% |
| | GVB Office | 3% | 4% | | 6% | | 3% | 3% | | 2% |
| | Consumer Trvl Show | 1% | 3% | | | | 2% | 1% | | |
| | Travel Trade Show | 1% | 1% | | | | 1% | 1% | | 2% |
| | Other | 1% | 1% | | | | 1% | 0% | | |
| | GVB Promo | 1% | | | 6% | | 0% | 0% | | |
| | Radio | 0% | 1% | | | | 0% | 0% | | 2% |
| | Total | 349 | 117 | 3 | 17 | 1 | 297 | 289 | 8 | 56 |

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.

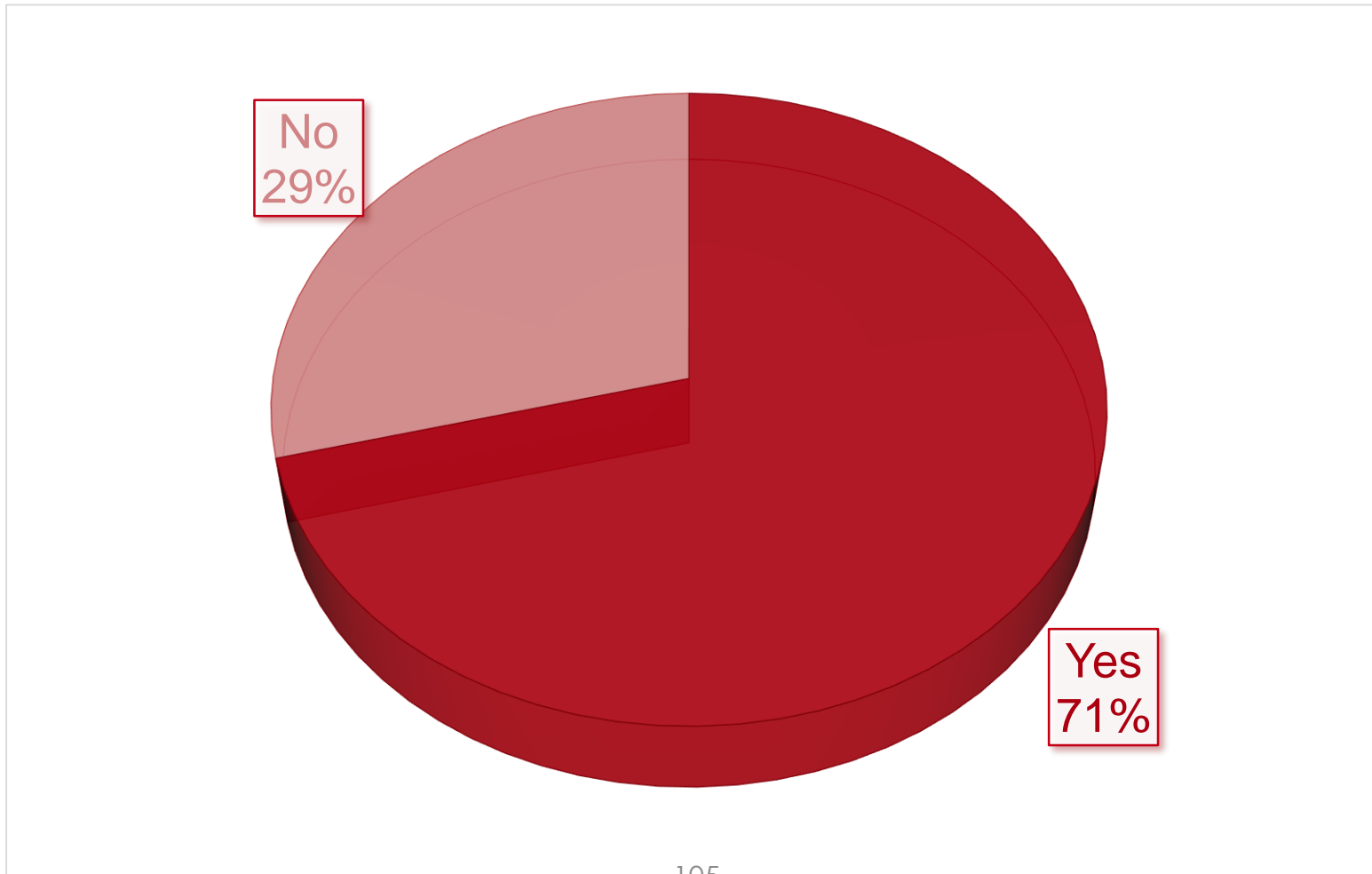
| | | TOTAL | FIT | MICE | HONEY-MOON | WEDDING | LEISURE TRAVELER | FAMILY | GROUP TOUR | REPEAT VISITOR |
|----|----------------------|-------|-----|------|------------|---------|------------------|--------|------------|----------------|
| | | - | - | - | - | - | - | - | - | - |
| Q2 | Internet | 64% | 70% | 67% | 82% | | 65% | 64% | 25% | 70% |
| | Hotel Staff | 52% | 57% | 67% | 59% | 100% | 54% | 52% | 50% | 55% |
| | Tour Staff | 42% | 21% | 67% | 53% | | 44% | 42% | 50% | 26% |
| | Signs/ Advertisement | 30% | 30% | | 24% | | 27% | 30% | 38% | 42% |
| | Taxi Driver | 20% | 26% | 67% | 12% | 100% | 21% | 20% | 13% | 21% |
| | Other Visitors | 17% | 18% | | 24% | | 18% | 18% | | 11% |
| | Local Ppl | 13% | 13% | | 6% | | 13% | 12% | 13% | 21% |
| | Local Publication | 10% | 10% | | 12% | | 10% | 10% | 25% | 8% |
| | Retail Staff | 10% | 14% | 33% | 18% | 100% | 9% | 10% | | 11% |
| | Restaurant Staff | 7% | 7% | | 6% | | 6% | 6% | | 2% |
| | Visitor Channel | 6% | 3% | | | | 5% | 6% | 13% | 11% |
| | Other | 4% | 5% | | 12% | | 4% | 3% | | |
| | GVB | 3% | 3% | | | | 4% | 4% | 13% | 2% |
| | Total | 344 | 115 | 3 | 17 | 1 | 296 | 286 | 8 | 53 |

Prepared by QMark Research

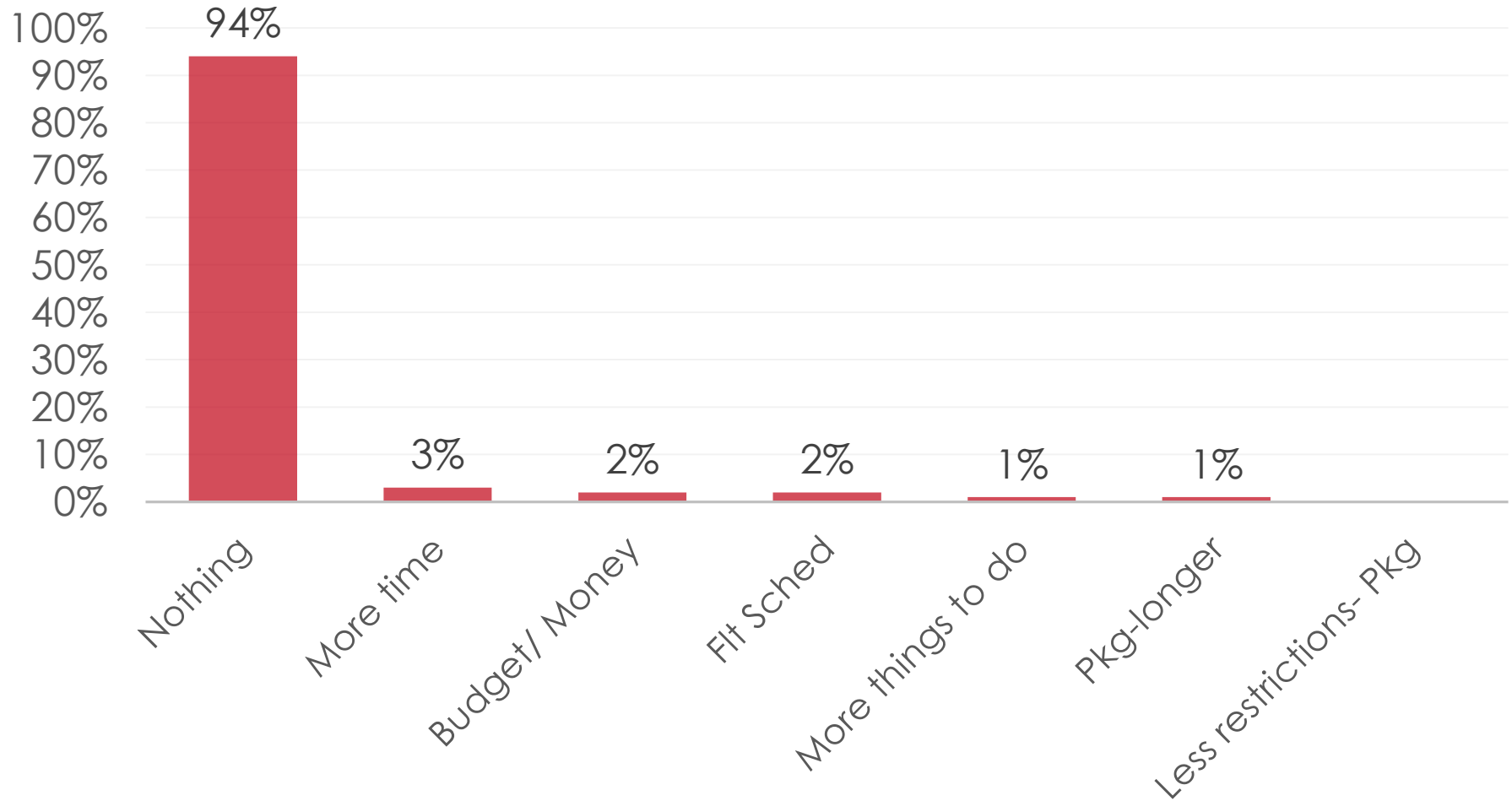
SECTION 6

FUTURE TRAVEL TO GUAM

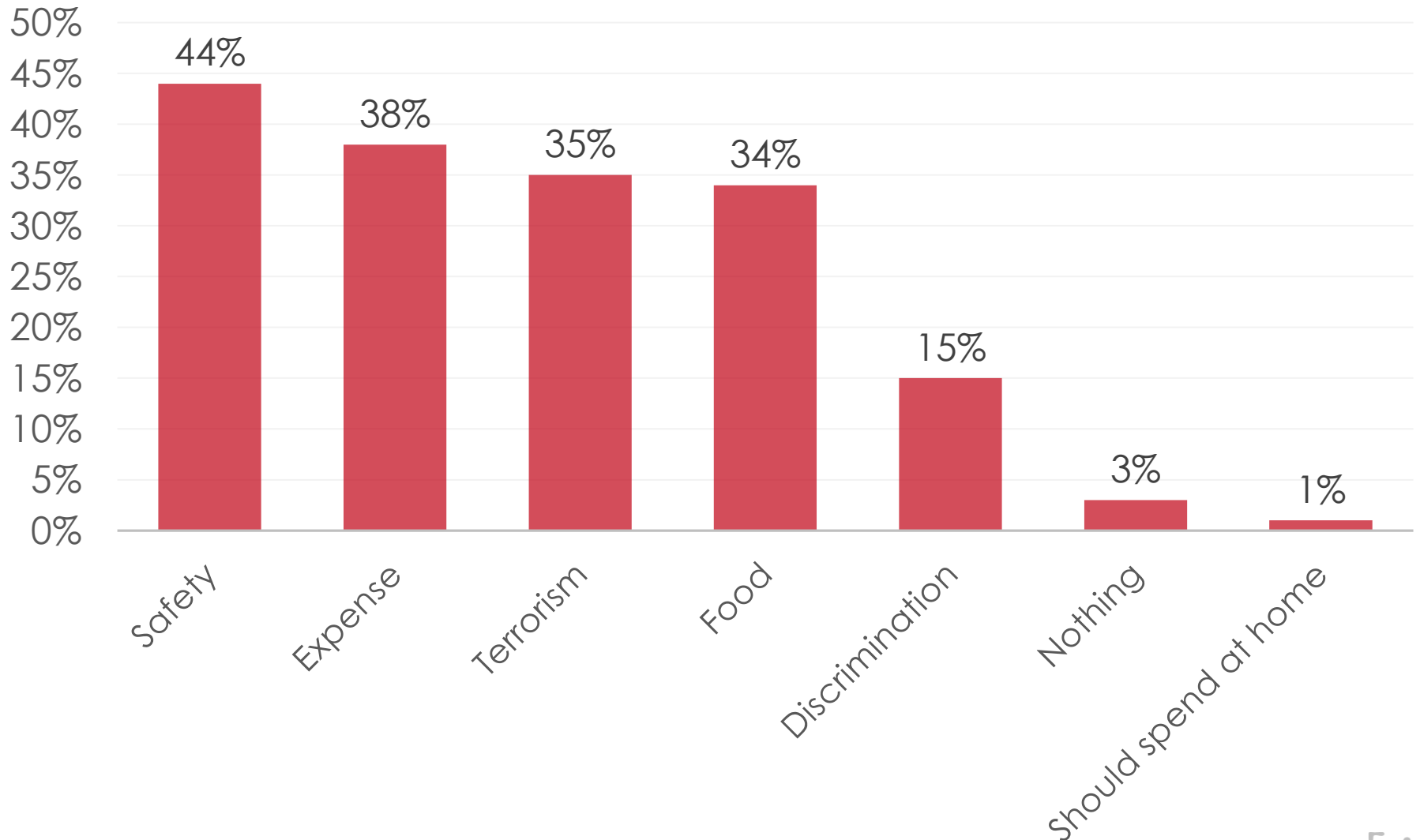
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



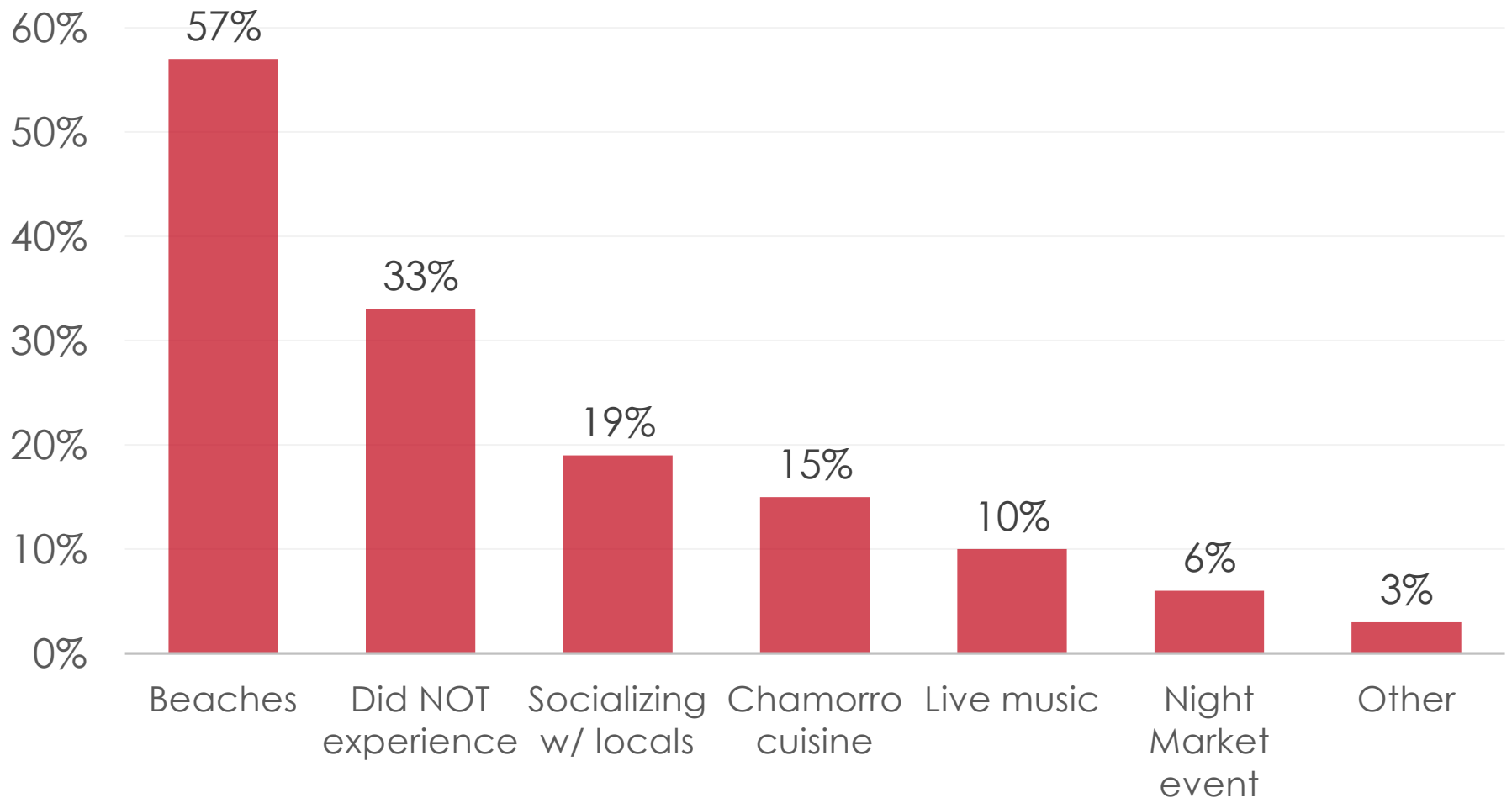
FUTURE TRAVEL CONCERNS



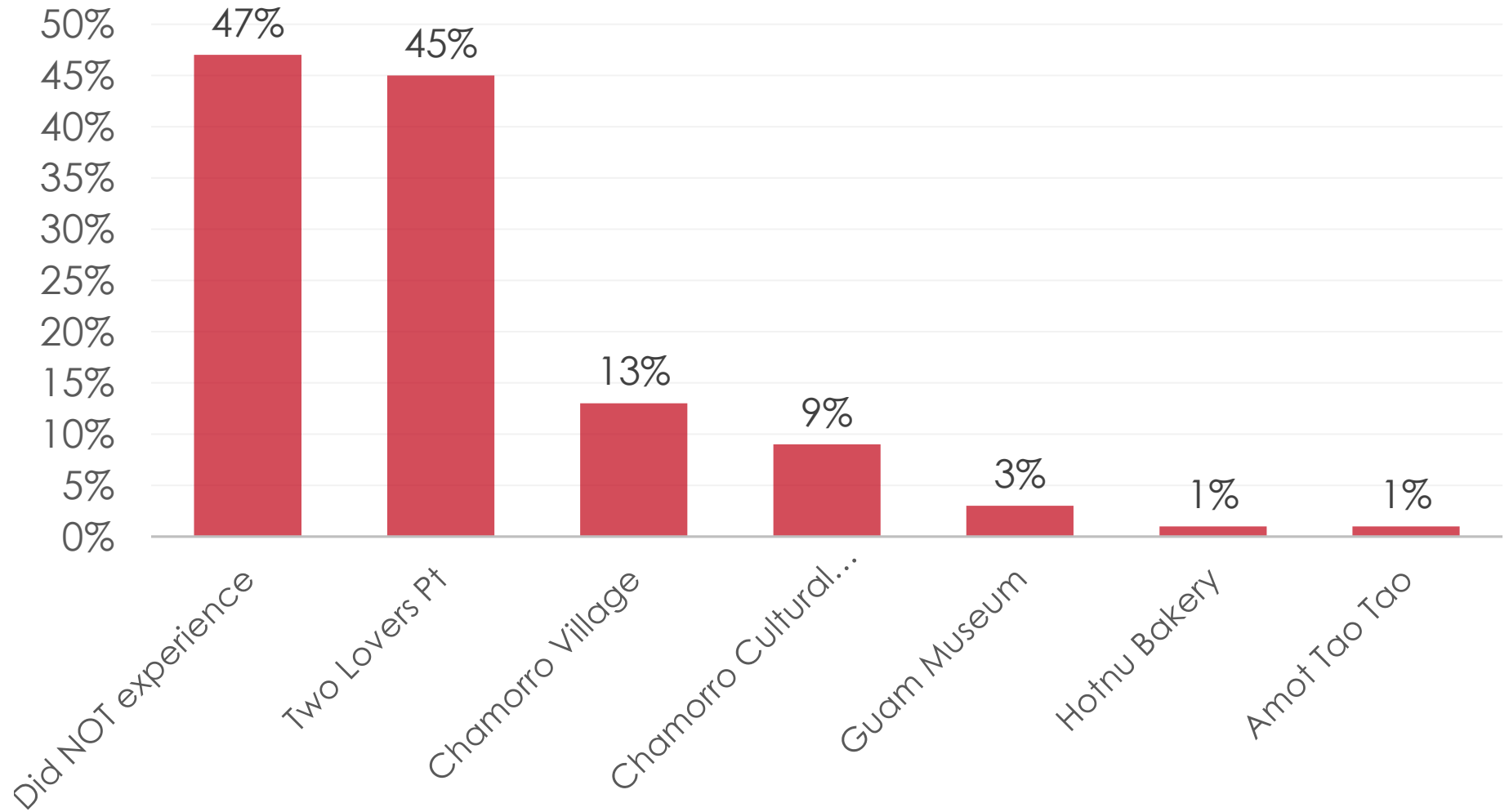
SECTION 7

GUAM CULTURE

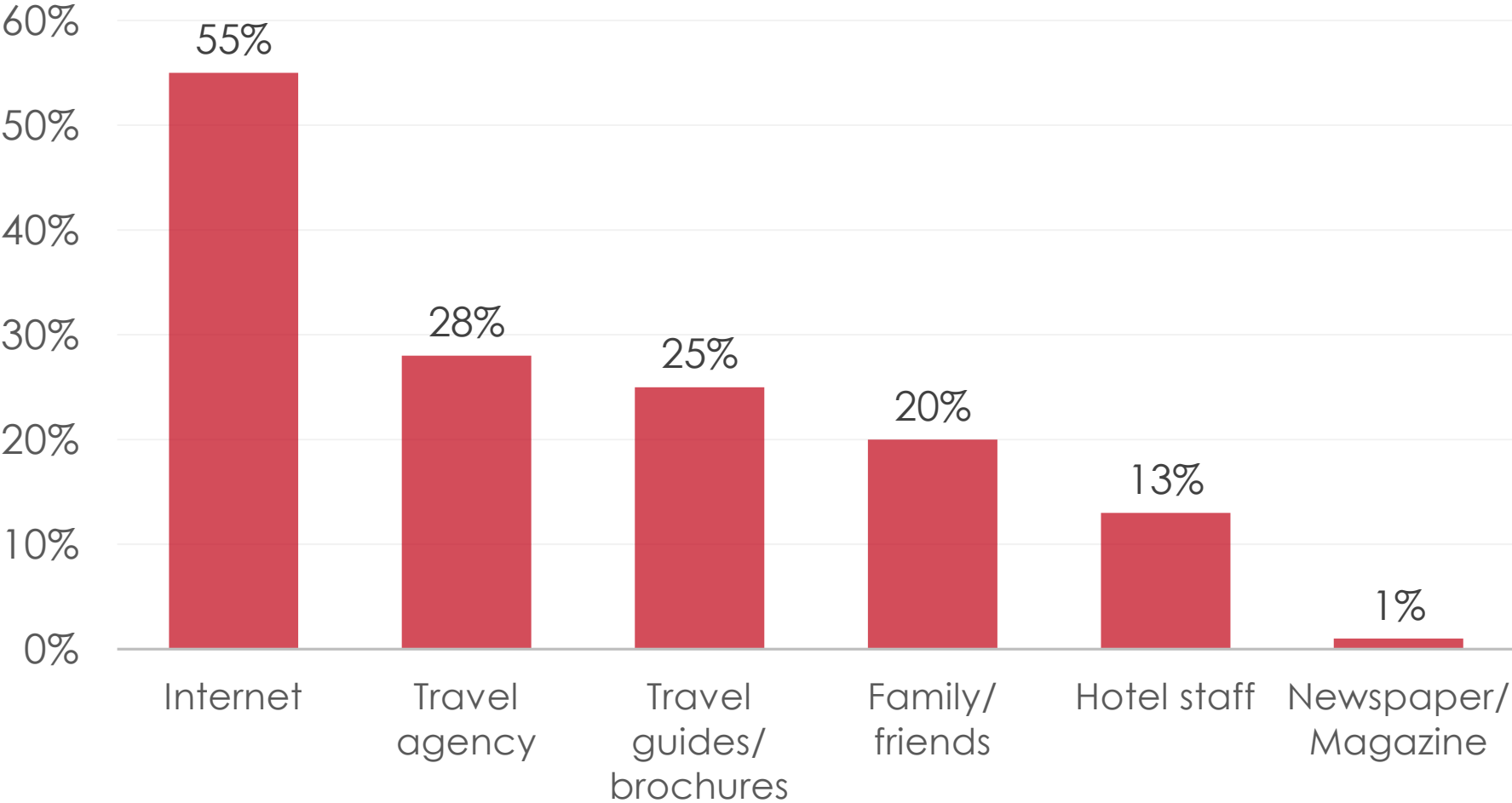
EXPERIENCED- CHAMORRO/ HAFFA ADAI SPIRIT



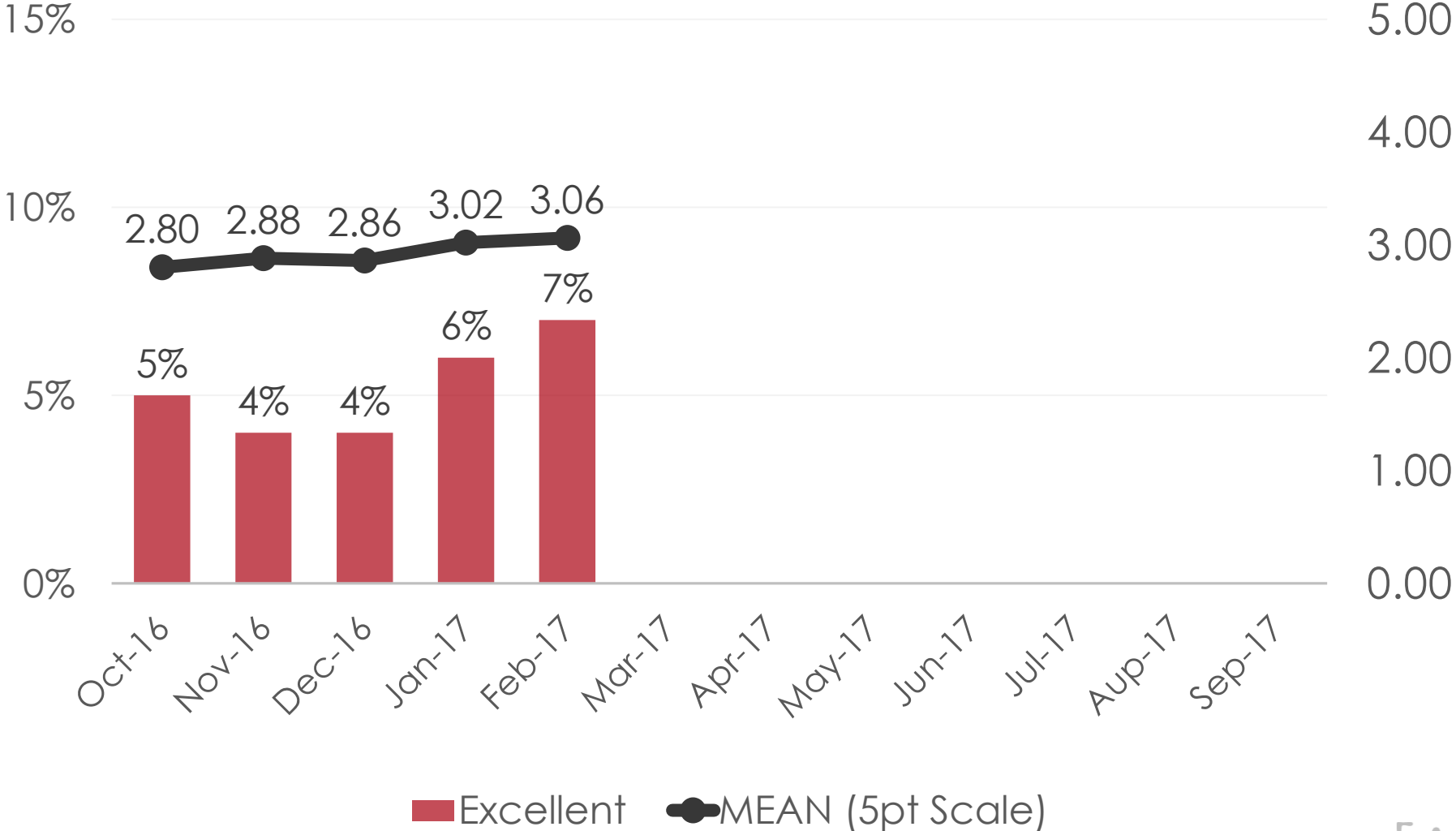
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



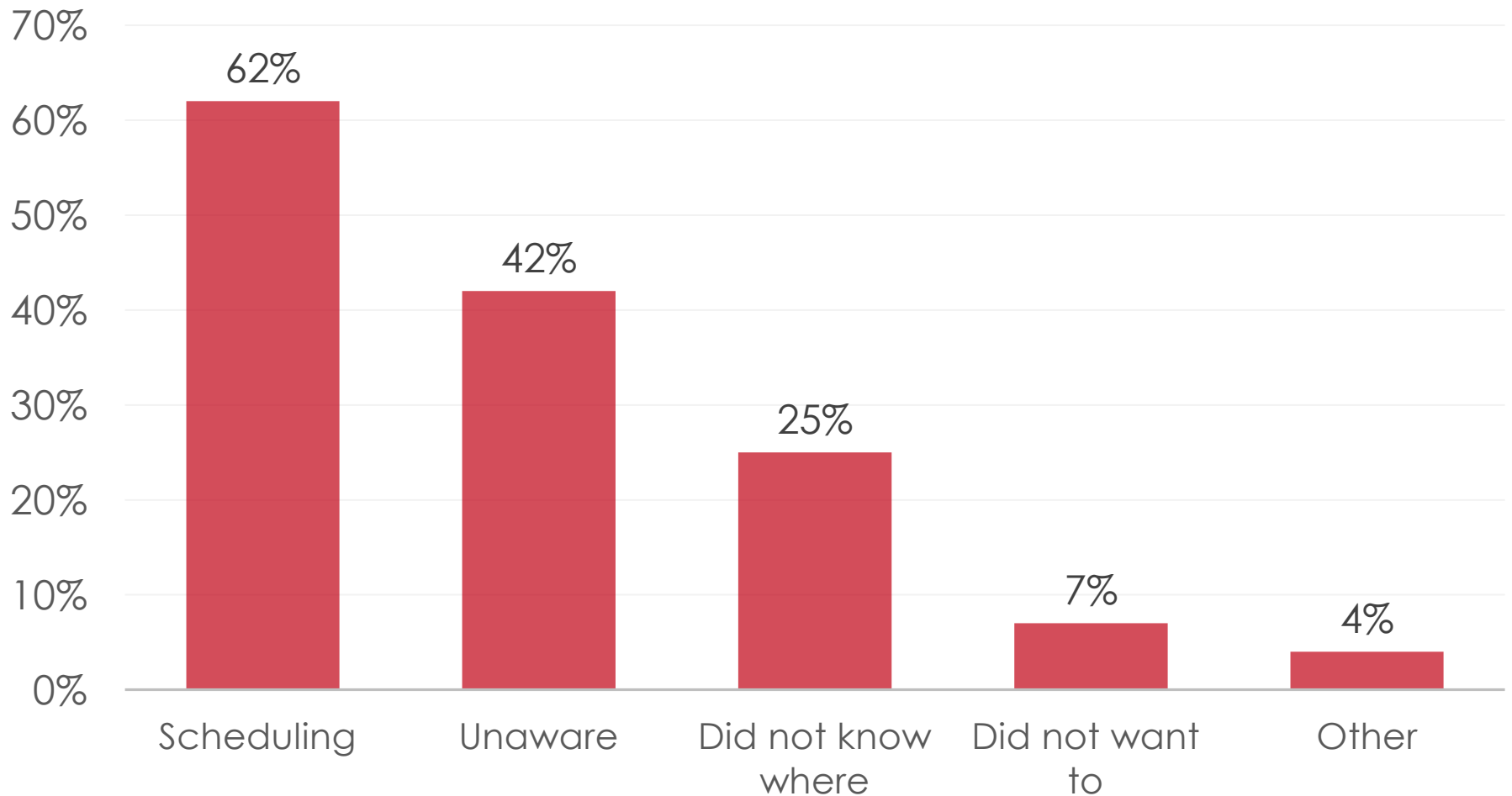
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



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 | 3 | 3 | | 3 | 6 | 3 |
| Ease of getting around | | | 4 | | | 6 |
| Safety walking around at night | 7 | | | | | |
| Quality of daytime tours | | | 3 | | 2 | 7 |
| Variety of daytime tours | | | | | | |
| Quality of nighttime tours | | | | | | |
| Variety of nighttime tours | | | | | | |
| Quality of shopping | | | 6 | 2 | | 4 |
| Variety of shopping | 6 | | | | | |
| Price of things on Guam | | | | | | |
| Quality of hotel accommodations | 4 | 4 | | | 4 | 3 |
| Quality/cleanliness of air, sky | | | | | | |
| Quality/cleanliness of parks | 1 | | | | 5 | 8 |
| Quality of landscape in Tumon | | 2 | 1 | 1 | 1 | 1 |
| Quality of landscape in Guam | | | 5 | 4 | | 5 |
| Quality of ground handler | 5 | | 2 | | | 9 |
| Quality/cleanliness of transportation vehicles | 2 | 1 | | | 3 | 2 |
| % of Per Person On Island Expenditures Accounted For | 64.0% | 61.8% | 44.1% | 40.8% | 57.5% | 54.1% |

NOTE: Only significant drivers are included.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by six significant factors in the February 2017 Period. By rank order they are:
 - **Quality of landscape in Tumon,**
 - **Quality of day time tours,**
 - **Quality & cleanliness of transportation vehicles,**
 - **Quality of hotel accommodations,**
 - **Quality/cleanliness of parks, and**
 - **Quality & cleanliness of beaches & parks.**
- With all six factors the overall r^2 is .575 meaning that **57.5% 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 | | | | | |
| Ease of getting around | | 2 | | | | |
| Safety walking around at night | | | | | | |
| Quality of daytime tours | | | | | | |
| Variety of daytime tours | | | | | | |
| Quality of nighttime tours | | | | | | |
| Variety of nighttime tours | | | | | | |
| Quality of shopping | | 3 | | | | 2 |
| Variety of shopping | | | | | | |
| Price of things on Guam | | 1 | | | | 1 |
| Quality of hotel accommodations | | | | | 1 | |
| Quality/cleanliness of air, sky | | | | | | |
| Quality/cleanliness of parks | | | | | | |
| Quality of landscape in Tumon | | | | | | |
| Quality of landscape in Guam | | | | | | |
| Quality of ground handler | 2 | | | | | |
| Quality/cleanliness of transportation vehicles | | | | | | 3 |
| % of Per Person On Island Expenditures Accounted For | 5.9% | 7.2% | 0.0% | 0.0% | 2.0% | 1.4% |

NOTE: Only significant drivers are included.

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Korean visitors on Guam is driven by one significant factor in the February 2017 period. It is:
 - **Quality of hotel accommodations.**
- With this factor the overall r^2 is .020 meaning that **2.0% of per person on island expenditure is accounted for by this factor.**