

Guam Visitors Bureau

Korean Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

JULY 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.



[ANTHOLOGY]
AnthologyGroup.com



GUAM
VISITORS
BUREAU
SETBISION BISITAN GUAHAN



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 **357** 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 **357** 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.

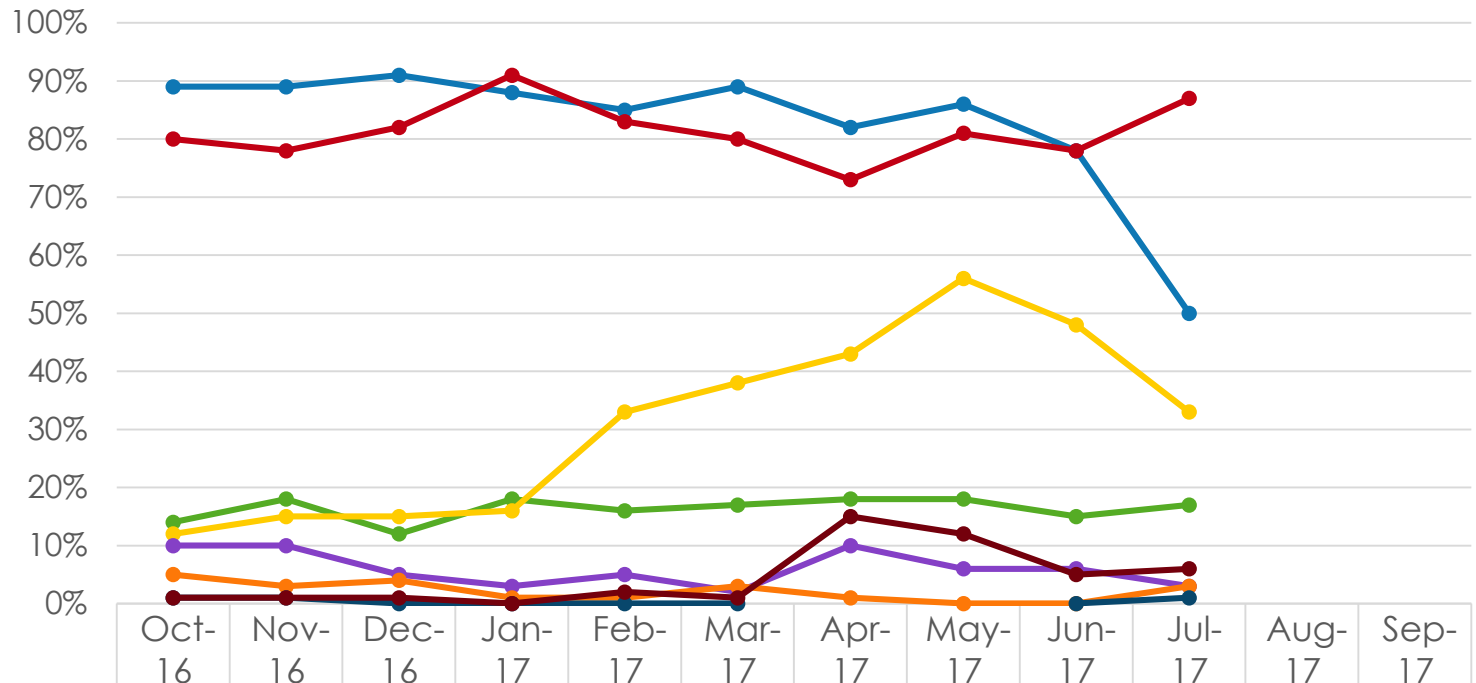
Objectives

- 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:
 - 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 (Q6)
 - Repeat Visitor (Q3)
 - FIT (Q7 Direct with airline/ hotel or online 3rd party travel site)
 - FAMILY (Q5 traveling with spouse/ child/ adult child/ adult family)
 - 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

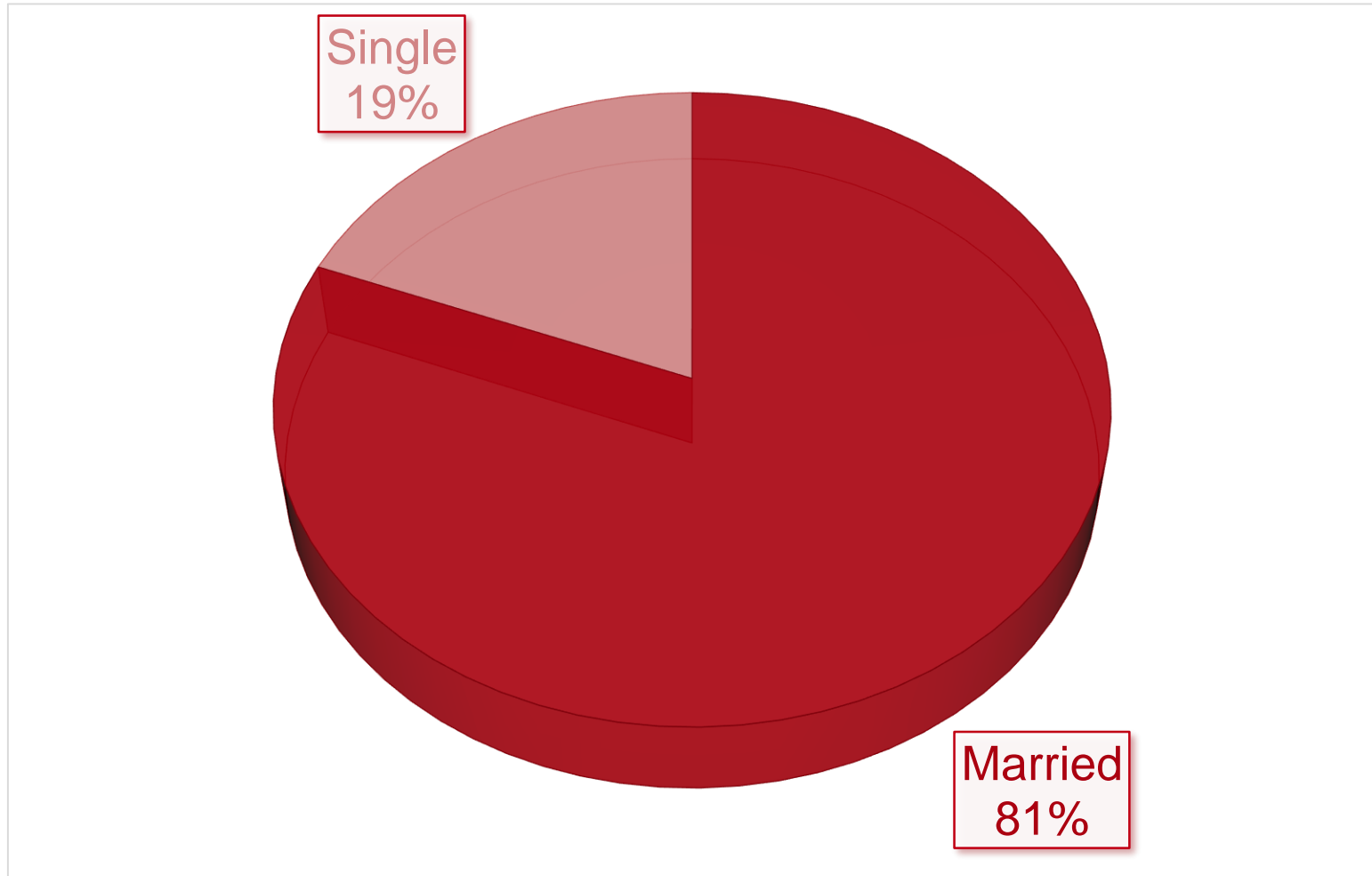


| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Leisure Traveler | 89% | 89% | 91% | 88% | 85% | 89% | 82% | 86% | 78% | 50% | | |
| Family | 80% | 78% | 82% | 91% | 83% | 80% | 73% | 81% | 78% | 87% | | |
| Repeat | 14% | 18% | 12% | 18% | 16% | 17% | 18% | 18% | 15% | 17% | | |
| FIT | 12% | 15% | 15% | 16% | 33% | 38% | 43% | 56% | 48% | 33% | | |
| Honey-moon | 10% | 10% | 5% | 3% | 5% | 2% | 10% | 6% | 6% | 3% | | |
| MICE | 5% | 3% | 4% | 1% | 1% | 3% | 1% | 0% | 0% | 3% | | |
| Wedding | 1% | 1% | 0% | 0% | 0% | 0% | | | 0% | 1% | | |
| Group | 1% | 1% | 1% | 0% | 2% | 1% | 15% | 12% | 5% | 6% | | |

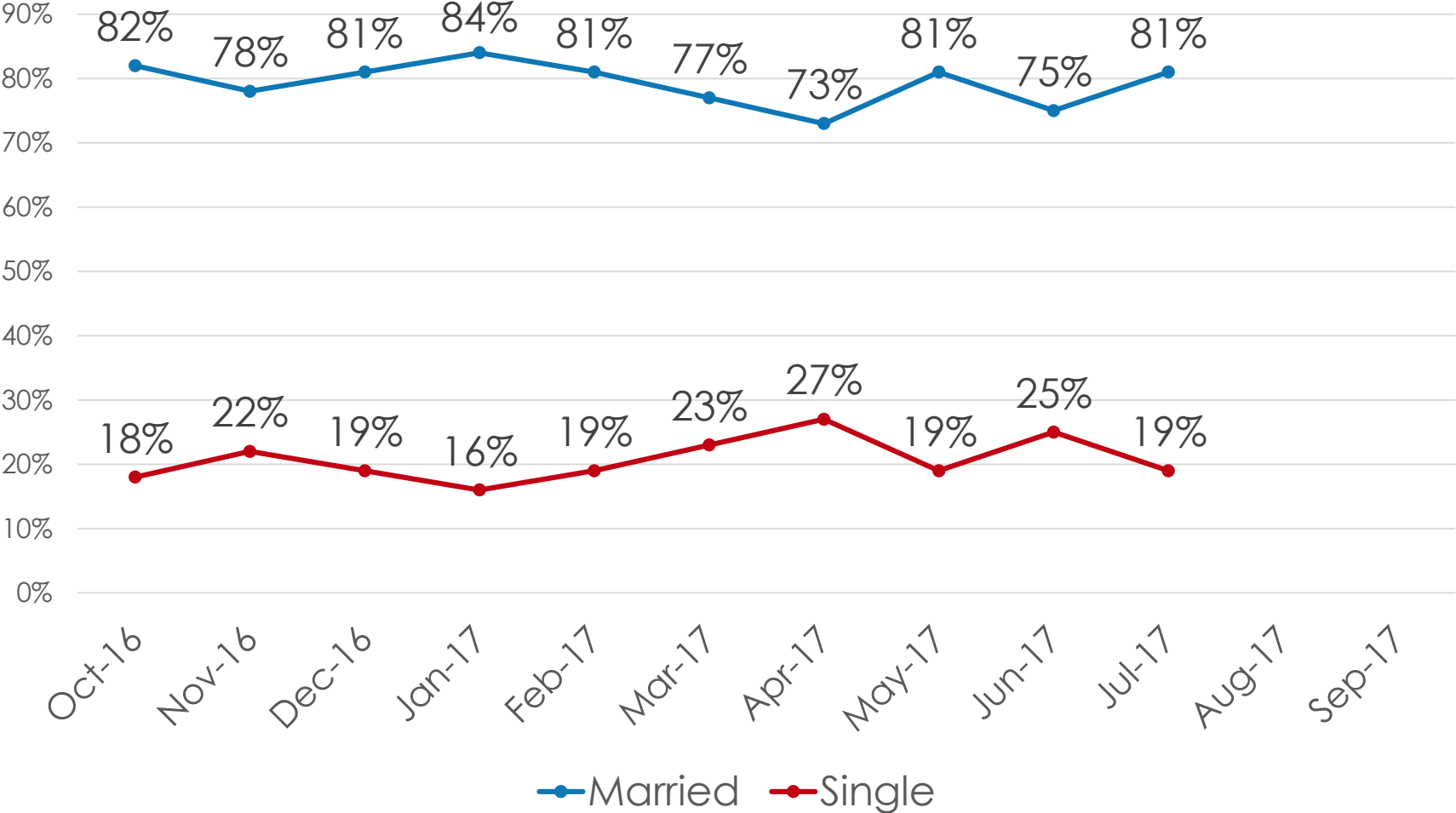
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2017 Tracking



Marital status – Key Segments

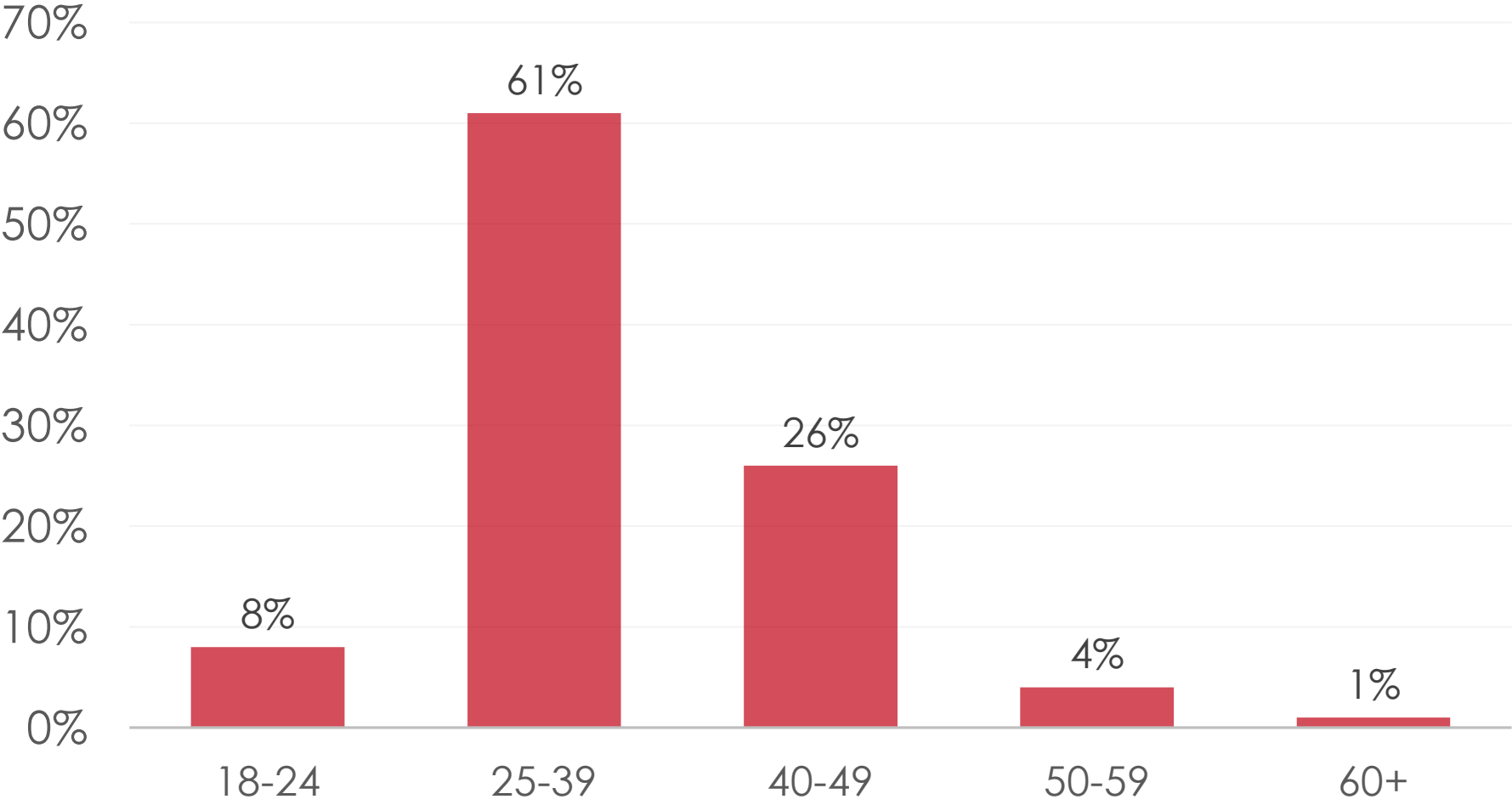
**GVB EXIT SURVEY
QE MARITAL STATUS**

| | | TOTAL | MICE | HONEYMOON | WEDDING | LEISURE | GROUP TOUR | REPEAT VISITOR | FAMILY | FIT |
|----|---------|-------|------|-----------|---------|---------|------------|----------------|--------|-----|
| | | - | - | - | - | - | - | - | - | - |
| QE | Married | 81% | 60% | 100% | 67% | 81% | 73% | 93% | 92% | 59% |
| | Single | 19% | 40% | | 33% | 19% | 27% | 7% | 8% | 41% |
| | Total | 357 | 10 | 12 | 3 | 180 | 22 | 61 | 310 | 117 |

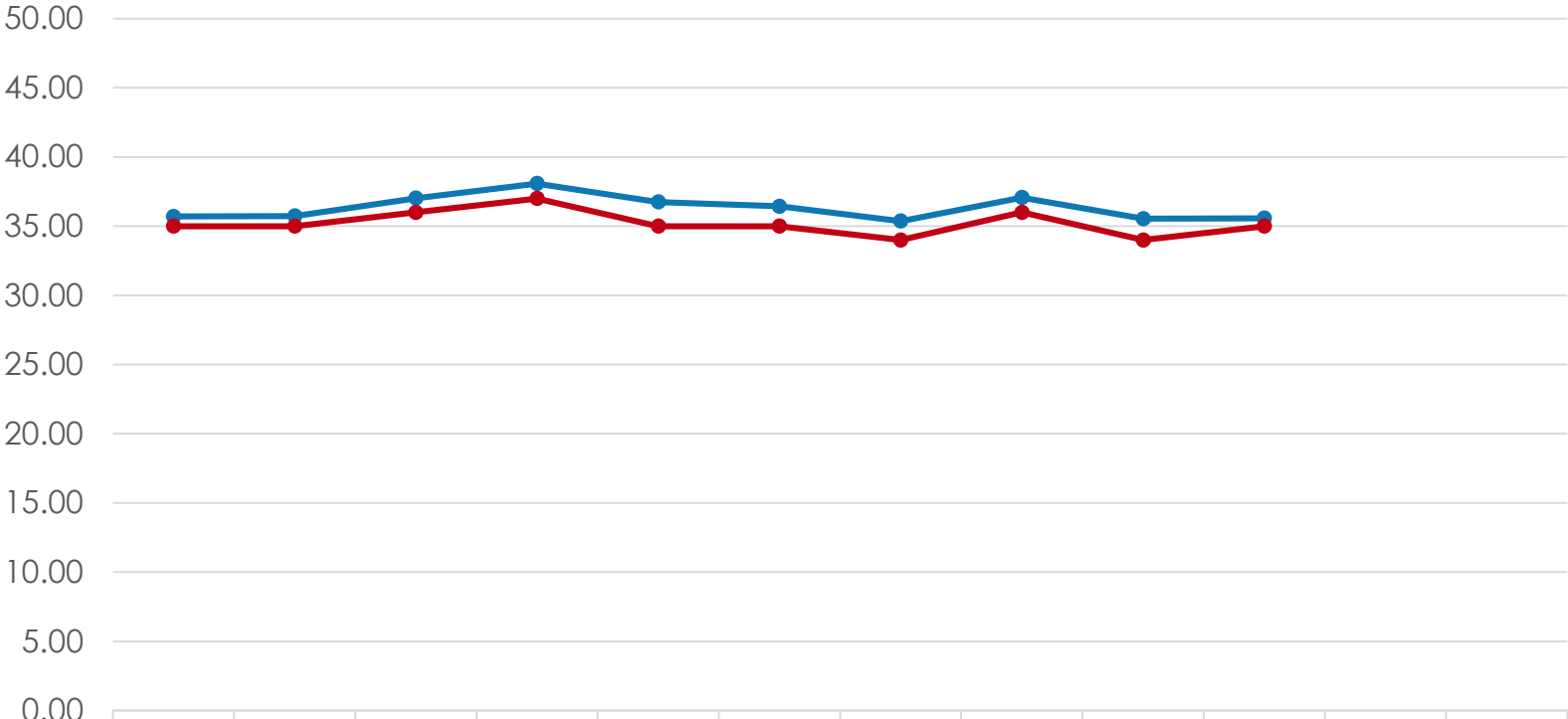
Prepared by Anthology Research

Age

MEAN = 35.57
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 | 36.44 | 35.37 | 37.07 | 35.54 | 35.57 | | |
| MEDIAN | 35 | 35 | 36 | 37 | 35 | 35 | 34 | 36 | 34 | 35 | | |

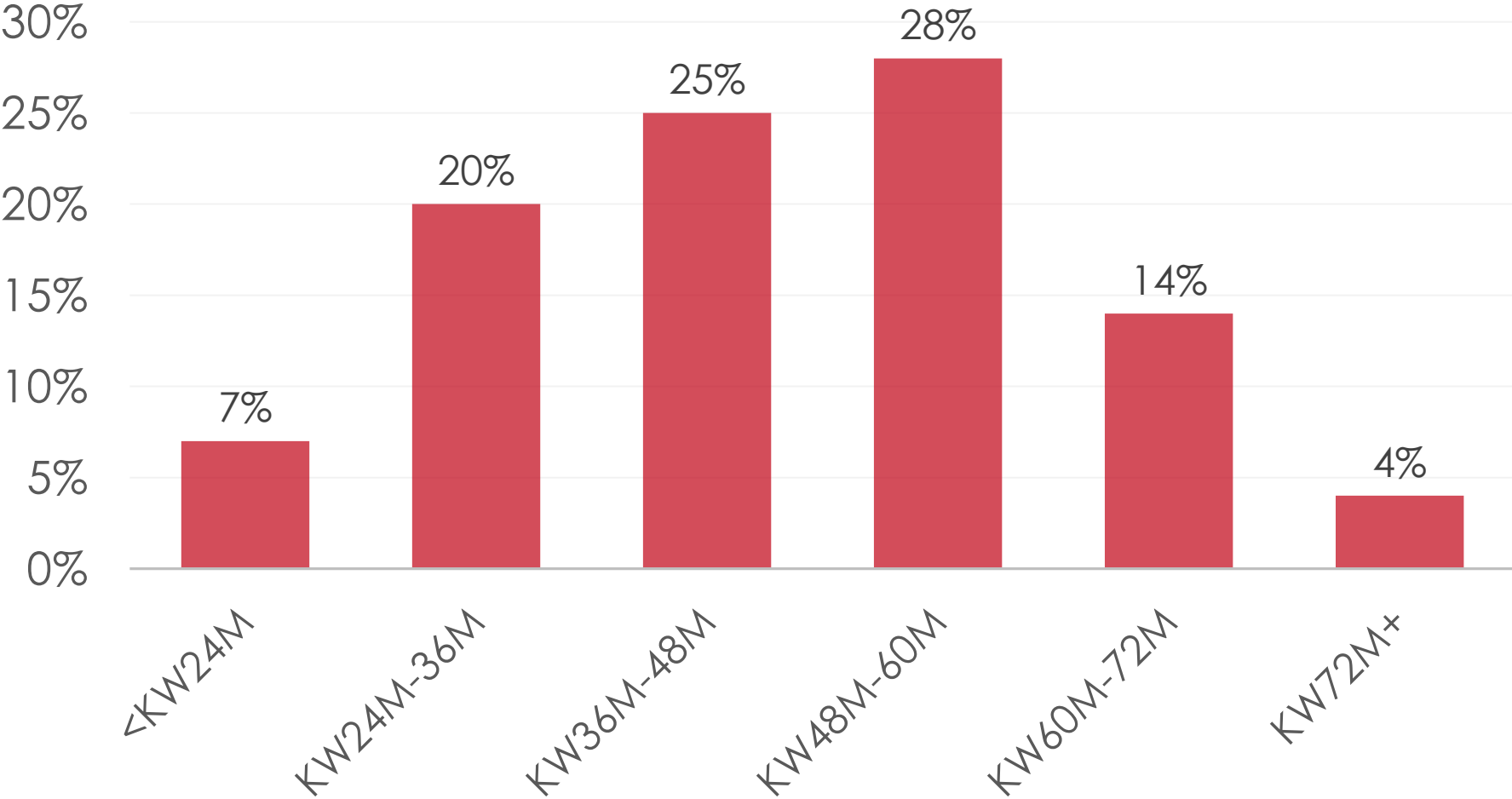
Age – Key Segments

GVB EXIT SURVEY AGE

| | | TOTAL | MICE | HONEYMOON | WEDDING | LEISURE | GROUP TOUR | REPEAT VISITOR | FAMILY | FIT |
|----|--------|-------|-------|-----------|---------|---------|------------|----------------|--------|-------|
| | | - | - | - | - | - | - | - | - | - |
| SD | 18-24 | 8% | 20% | | | 7% | 14% | | 7% | 11% |
| | 25-39 | 61% | 60% | 100% | 100% | 56% | 68% | 57% | 58% | 74% |
| | 40-49 | 26% | 20% | | | 32% | 9% | 33% | 30% | 15% |
| | 50-59 | 4% | | | | 4% | 9% | 10% | 4% | |
| | 60+ | 1% | | | | 1% | | | 1% | |
| | Total | 357 | 10 | 12 | 3 | 180 | 22 | 61 | 310 | 117 |
| SD | Mean | 35.57 | 32.10 | 31.83 | 34.67 | 36.47 | 32.73 | 39.34 | 36.59 | 32.50 |
| | Median | 35 | 32 | 32 | 34 | 36 | 31 | 39 | 36 | 33 |

Prepared by Anthology Research

Annual Household Income



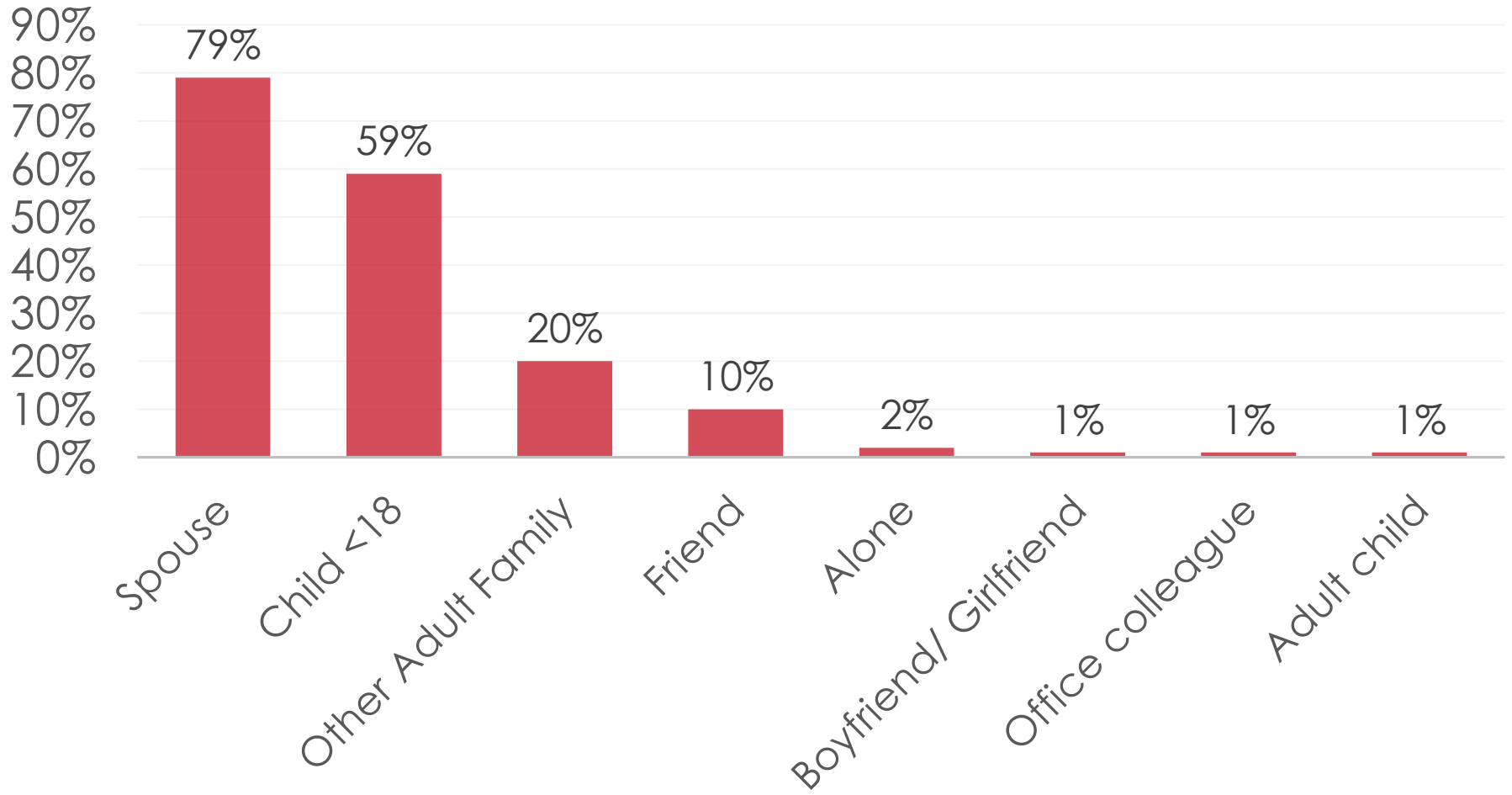
Annual Household Income – Key Segments

GVB EXIT SURVEY Q26 Household income:

| | | TOTAL | MICE | HONEYMOON | WEDDING | LEISURE | GROUP TOUR | REPEAT VISITOR | FAMILY | FIT |
|-----|-----------------------------|-------|------|-----------|---------|---------|------------|----------------|--------|-----|
| | | - | - | - | - | - | - | - | - | - |
| Q26 | Up to KW12,000,000 | 1% | | | | 2% | | | | 3% |
| | KW12,000,001 ~ KW24,000,000 | 6% | | | | 7% | 9% | | 2% | 14% |
| | KW24,000,001 ~ KW36,000,000 | 20% | 10% | 42% | 100% | 18% | 23% | 23% | 18% | 25% |
| | KW36,000,001 ~ KW48,000,000 | 25% | 30% | 42% | | 23% | 32% | 23% | 28% | 21% |
| | KW48,000,001 ~ KW60,000,000 | 28% | 40% | 17% | | 27% | 23% | 33% | 31% | 23% |
| | KW60,000,001 ~ KW72,000,000 | 14% | 20% | | | 14% | 14% | 13% | 15% | 7% |
| | More than KW72,000,001 | 4% | | | | 7% | | 7% | 5% | 3% |
| | No Income | 2% | | | | 2% | | 2% | 0% | 5% |
| | Total | 357 | 10 | 12 | 3 | 180 | 22 | 61 | 310 | 117 |

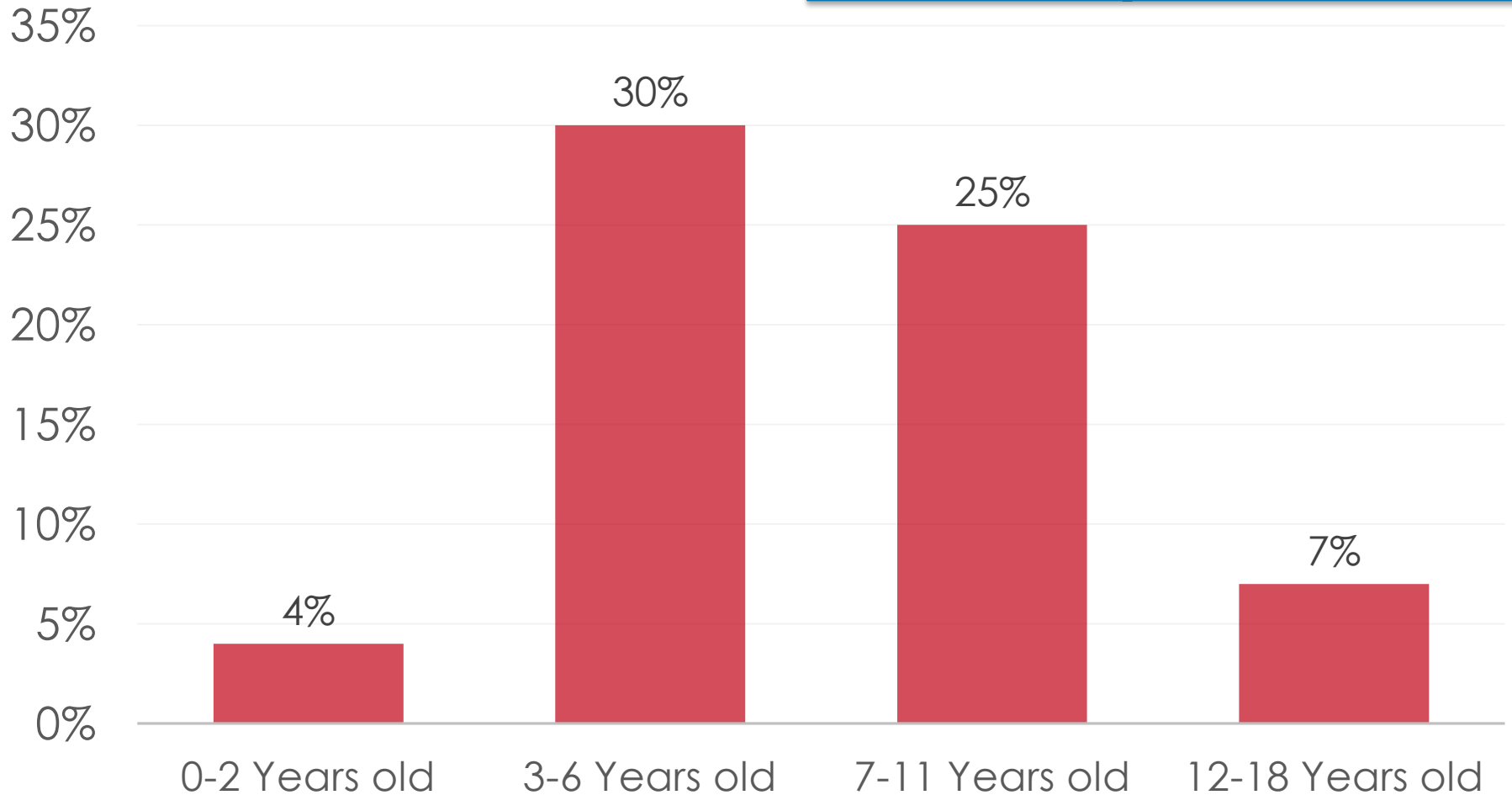
Prepared by Anthology Research

Travel Party

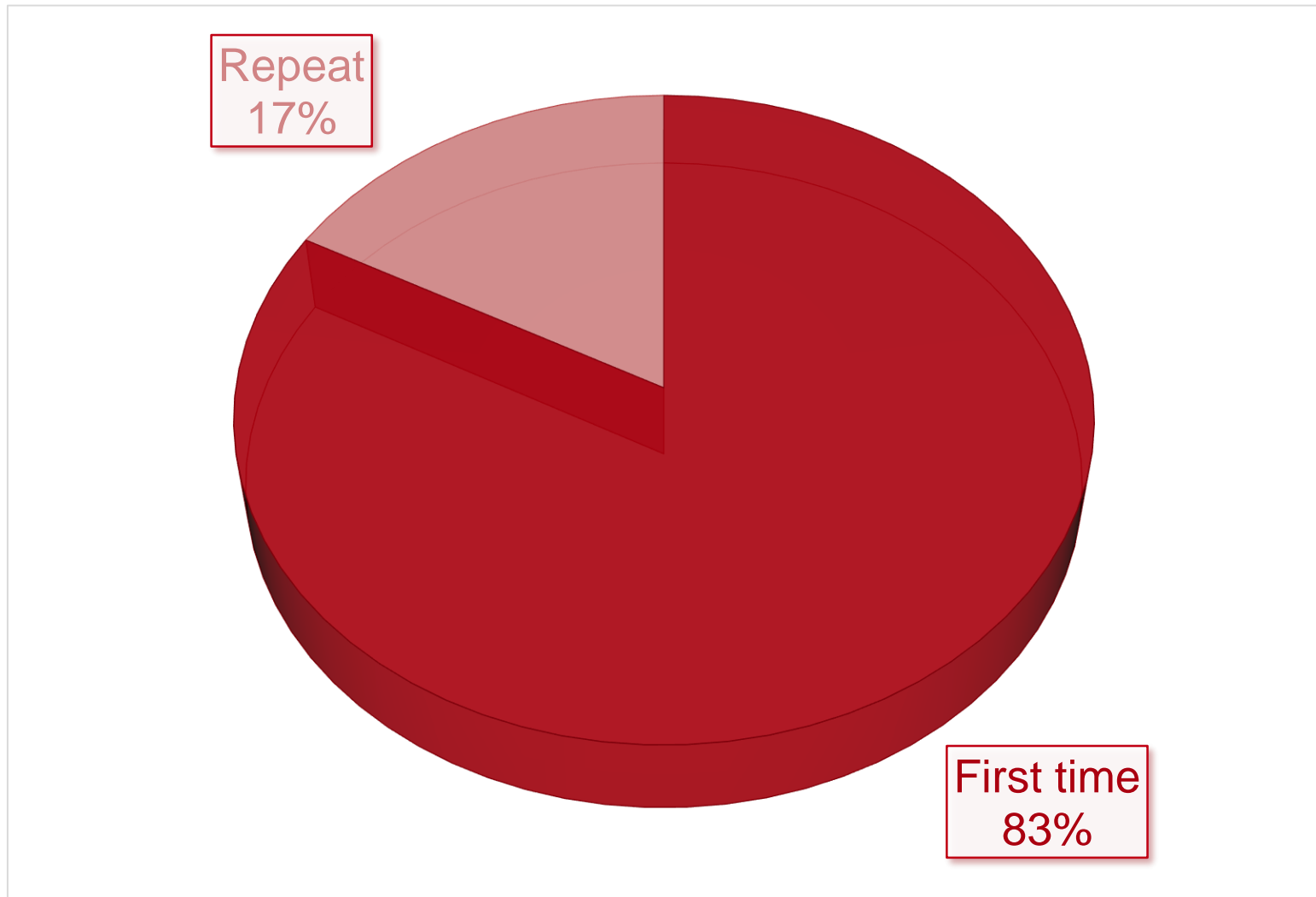


Travel Party - Children

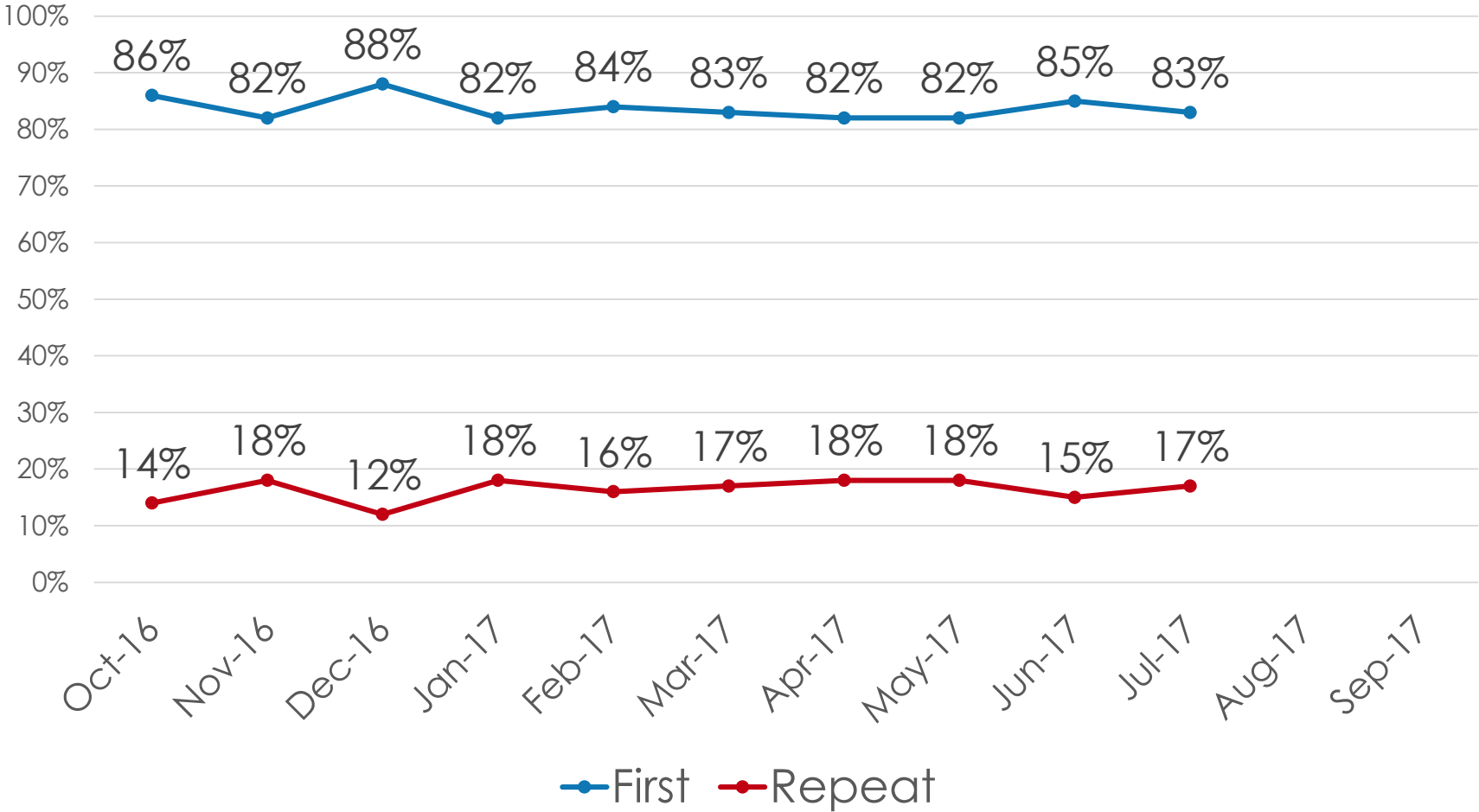
59% TRAVELING WITH A CHILD



Trips to Guam



Trips to Guam – FY2017 Tracking



Trips to Guam – Key Segments

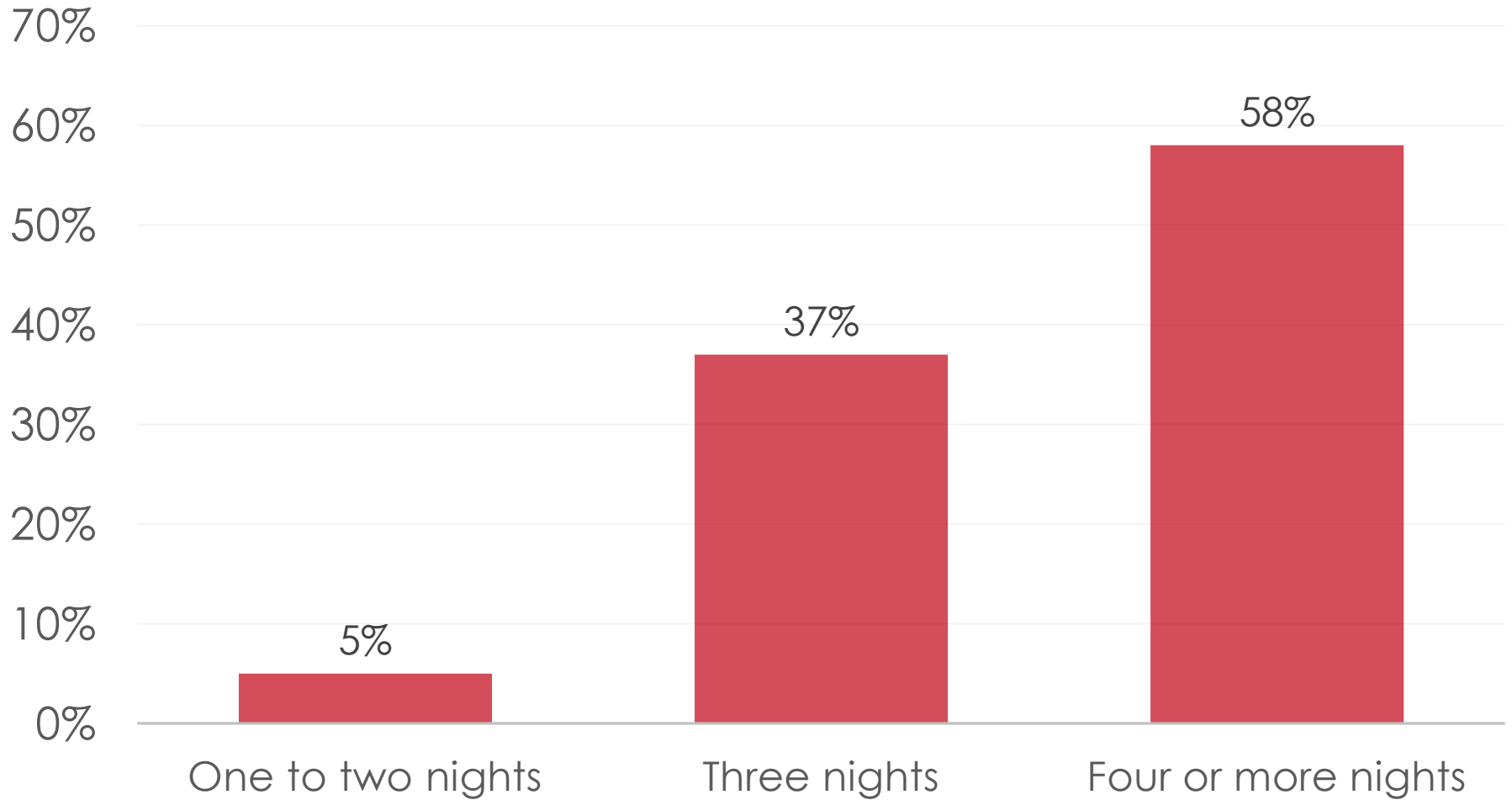
GVB EXIT SURVEY
Q3 Including this trip, how many times have you visited Guam?

| | | TOTAL | MICE | HONEYMOON | WEDDING | LEISURE | GROUP TOUR | REPEAT VISITOR | FAMILY | FIT |
|----|----------|-------|------|-----------|---------|---------|------------|----------------|--------|------|
| | | - | - | - | - | - | - | - | - | - |
| Q3 | 1st Time | 83% | 100% | 100% | 100% | 89% | 86% | | 82% | 85% |
| | Repeat | 17% | | | | 11% | 14% | 100% | 18% | 15% |
| | Total | 357 | 10 | 12 | 3 | 180 | 22 | 61 | 310 | 117 |
| Q3 | Mean | 1.18 | 1.00 | 1.00 | 1.00 | 1.11 | 1.18 | 2.03 | 1.18 | 1.15 |
| | Median | 1 | 1 | 1 | 1 | 1 | 1 | 2 | 1 | 1 |

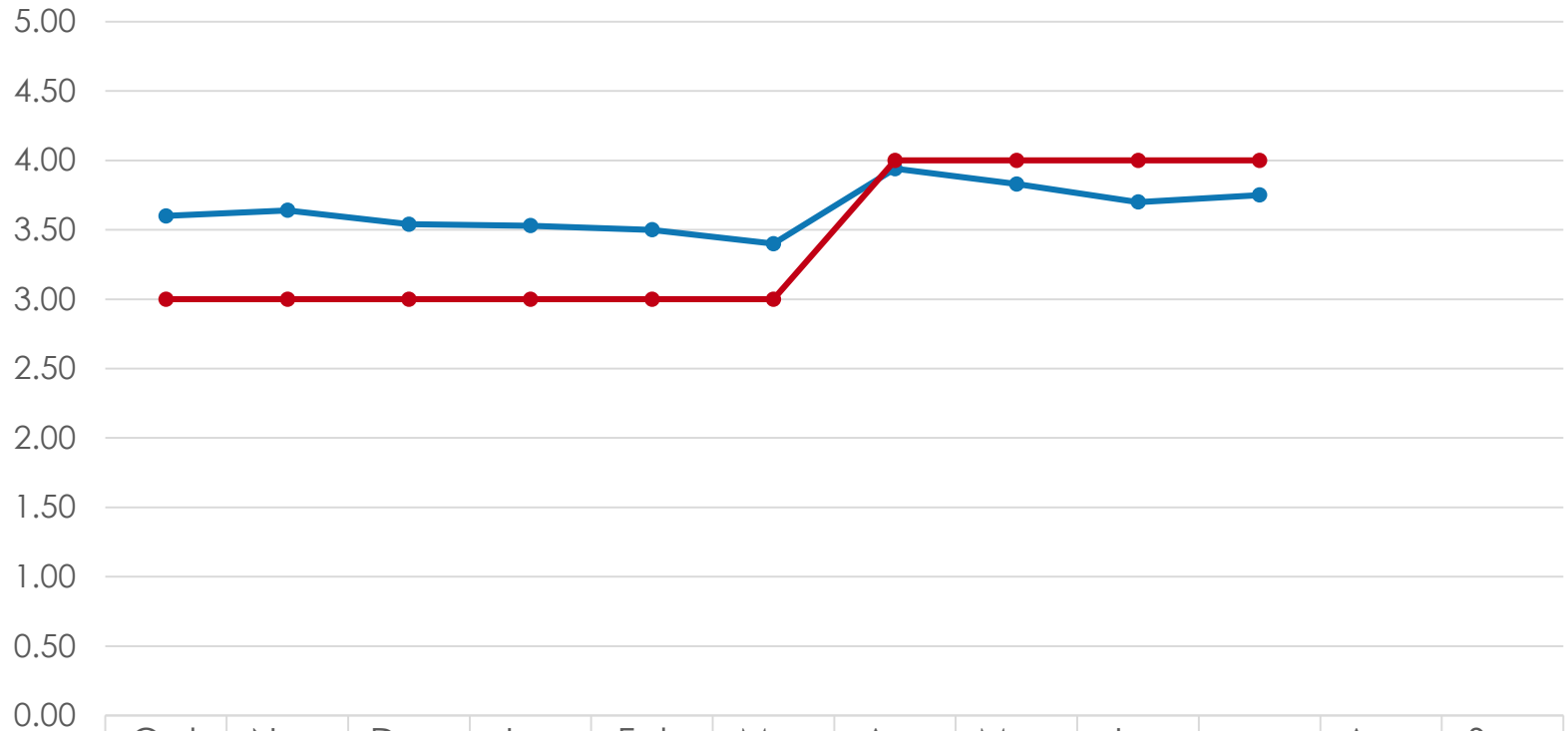
Prepared by Anthology Research

Length of Stay

MEAN NUMBER OF NIGHTS = 3.75
MEDIAN NUMBER OF NIGHTS = 4



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 | 3.40 | 3.94 | 3.83 | 3.70 | 3.75 | | |
| MEDIAN | 3 | 3 | 3 | 3 | 3 | 3 | 4 | 4 | 4 | 4 | | |

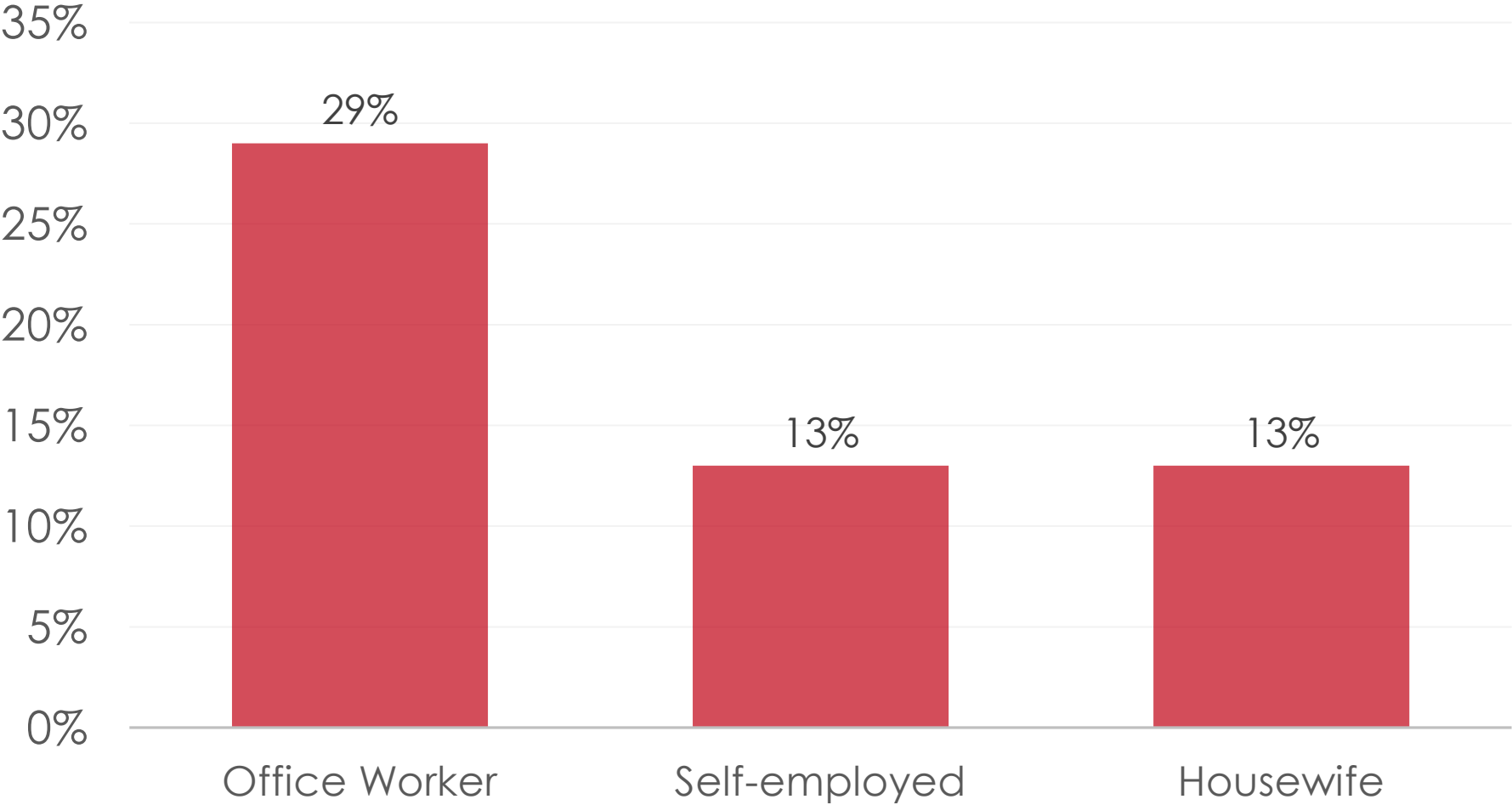
Length of Stay – Key Segments

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

| | | TOTAL | MICE | HONEYMOON | WEDDING | LEISURE | GROUP TOUR | REPEAT VISITOR | FAMILY | FIT |
|----|--------|-------|------|-----------|---------|---------|------------|----------------|--------|------|
| | | - | - | - | - | - | - | - | - | - |
| SA | 1-2 | 5% | | | | 2% | 23% | 2% | 5% | 4% |
| | 3 | 37% | 50% | 17% | 67% | 28% | 41% | 44% | 38% | 31% |
| | 4+ | 58% | 50% | 83% | 33% | 70% | 36% | 54% | 56% | 65% |
| | Total | 357 | 10 | 12 | 3 | 180 | 22 | 61 | 310 | 117 |
| SA | Mean | 3.75 | 3.50 | 4.25 | 3.33 | 4.05 | 3.18 | 3.62 | 3.74 | 3.73 |
| | Median | 4 | 4 | 4 | 3 | 4 | 3 | 4 | 4 | 4 |

Prepared by Anthology Research

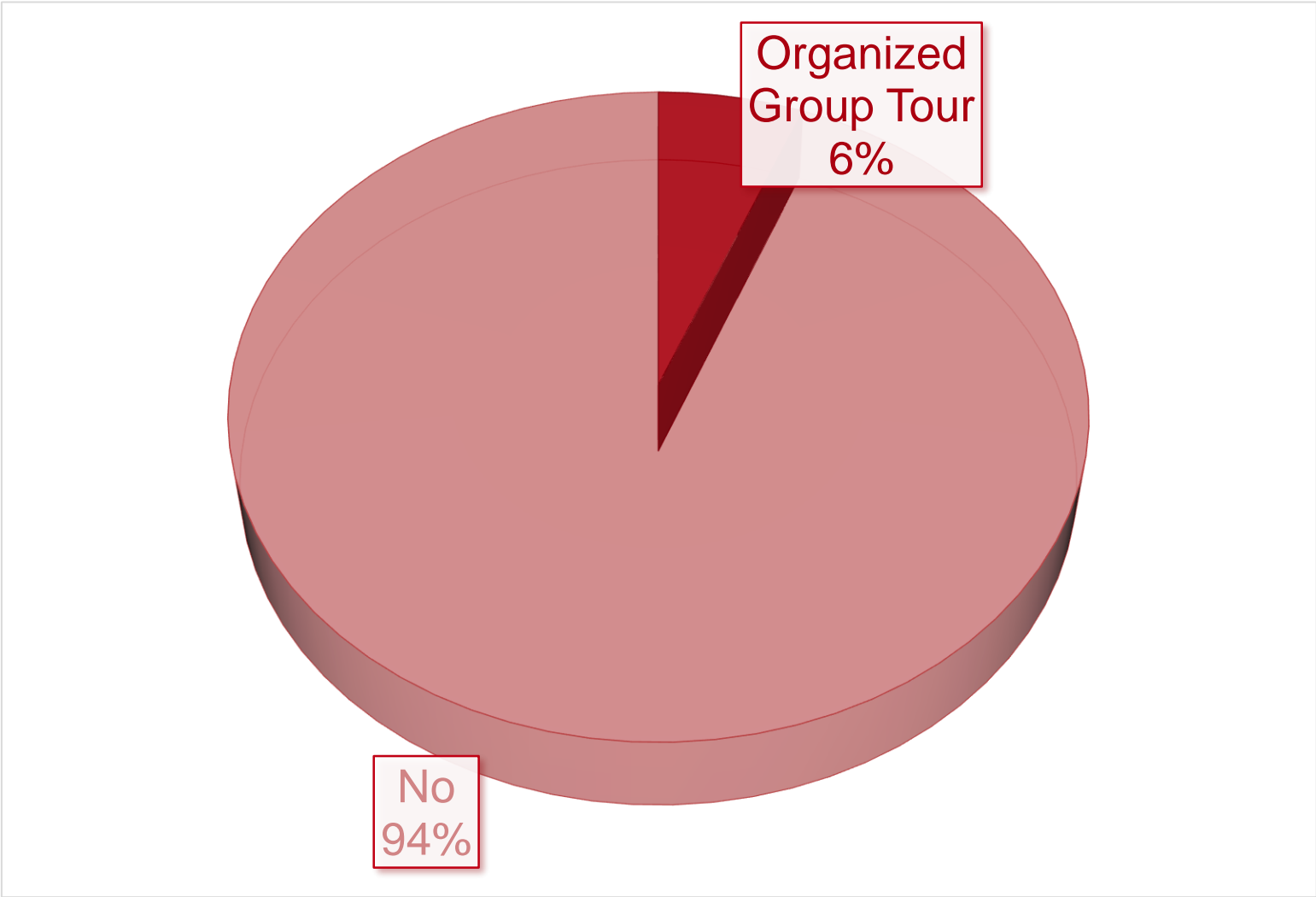
Occupation – Top Responses (10%+)



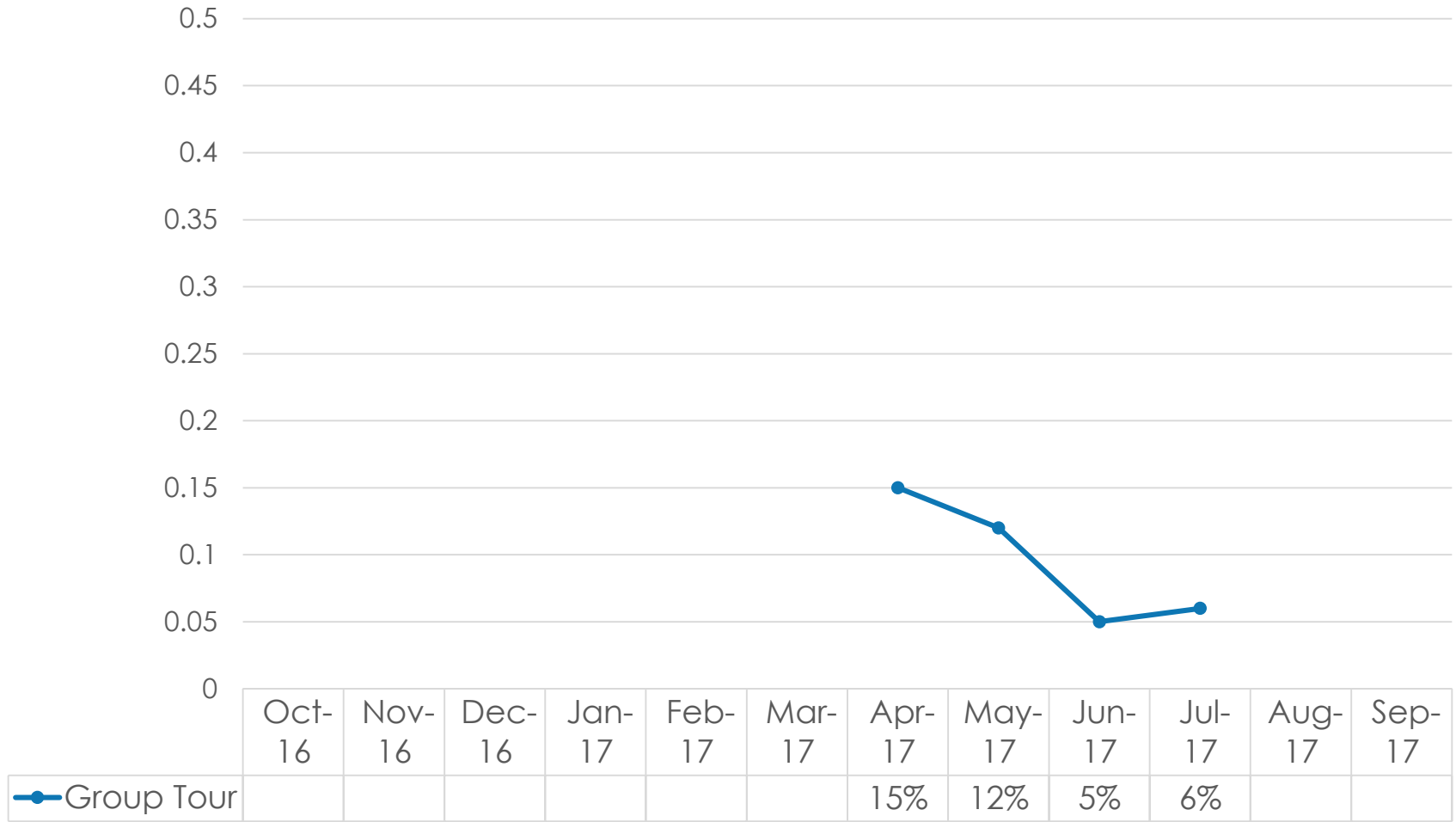
SECTION 2

TRAVEL PLANNING

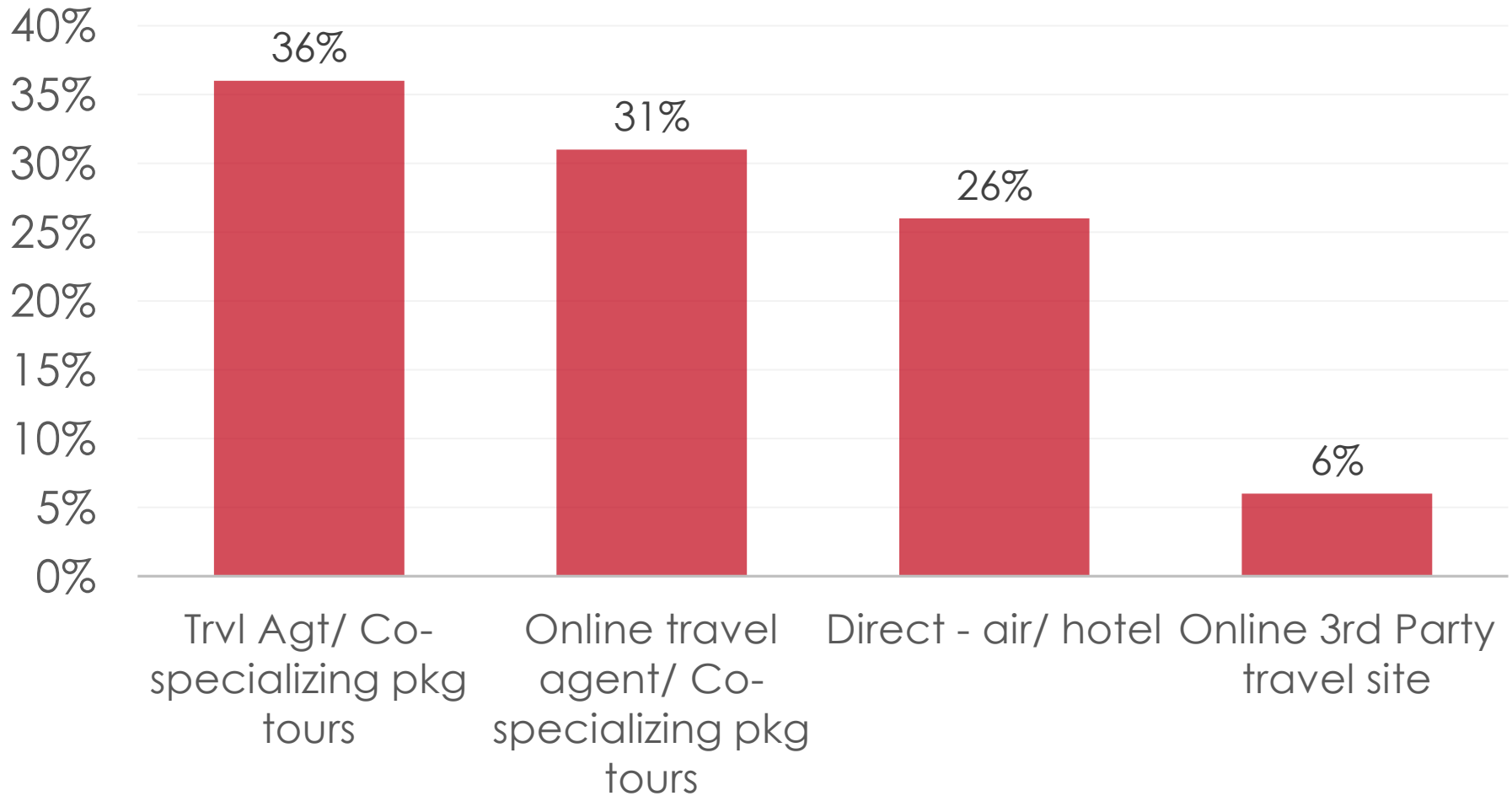
Organized Group Tour



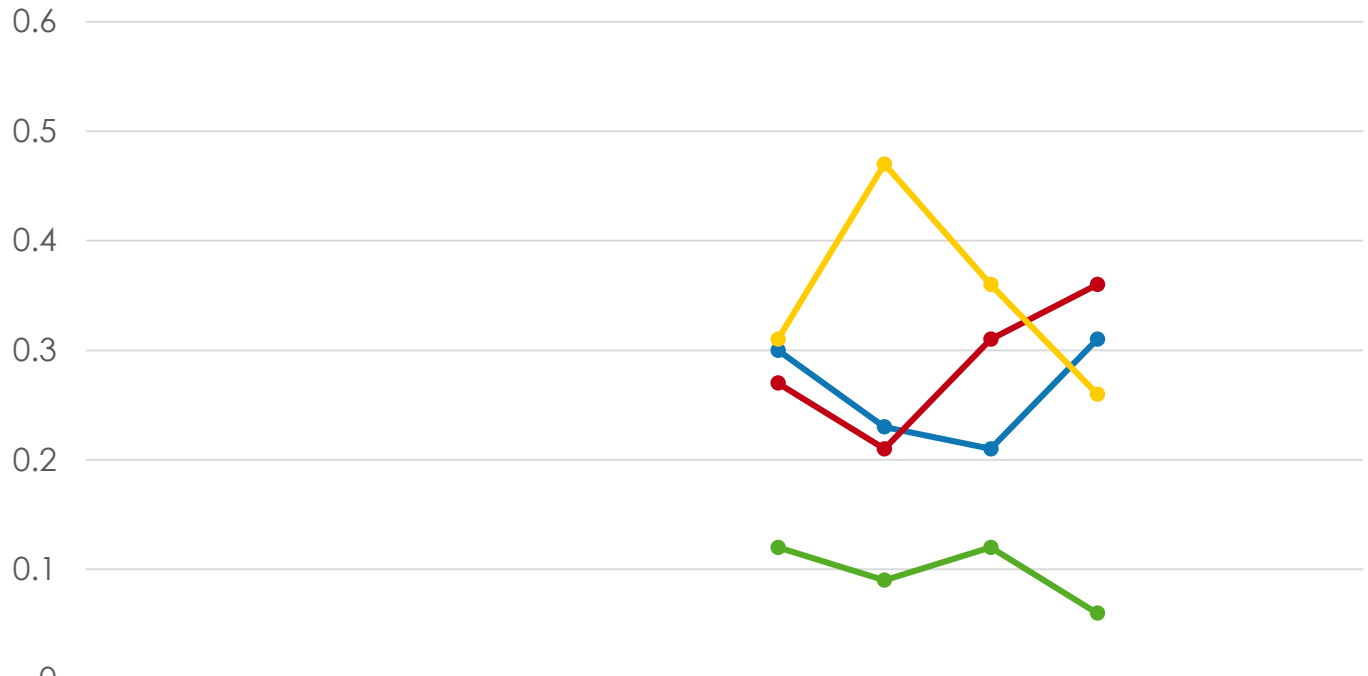
Organized Group Tour – FY2017 Tracking



Travel Arrangements - Sources

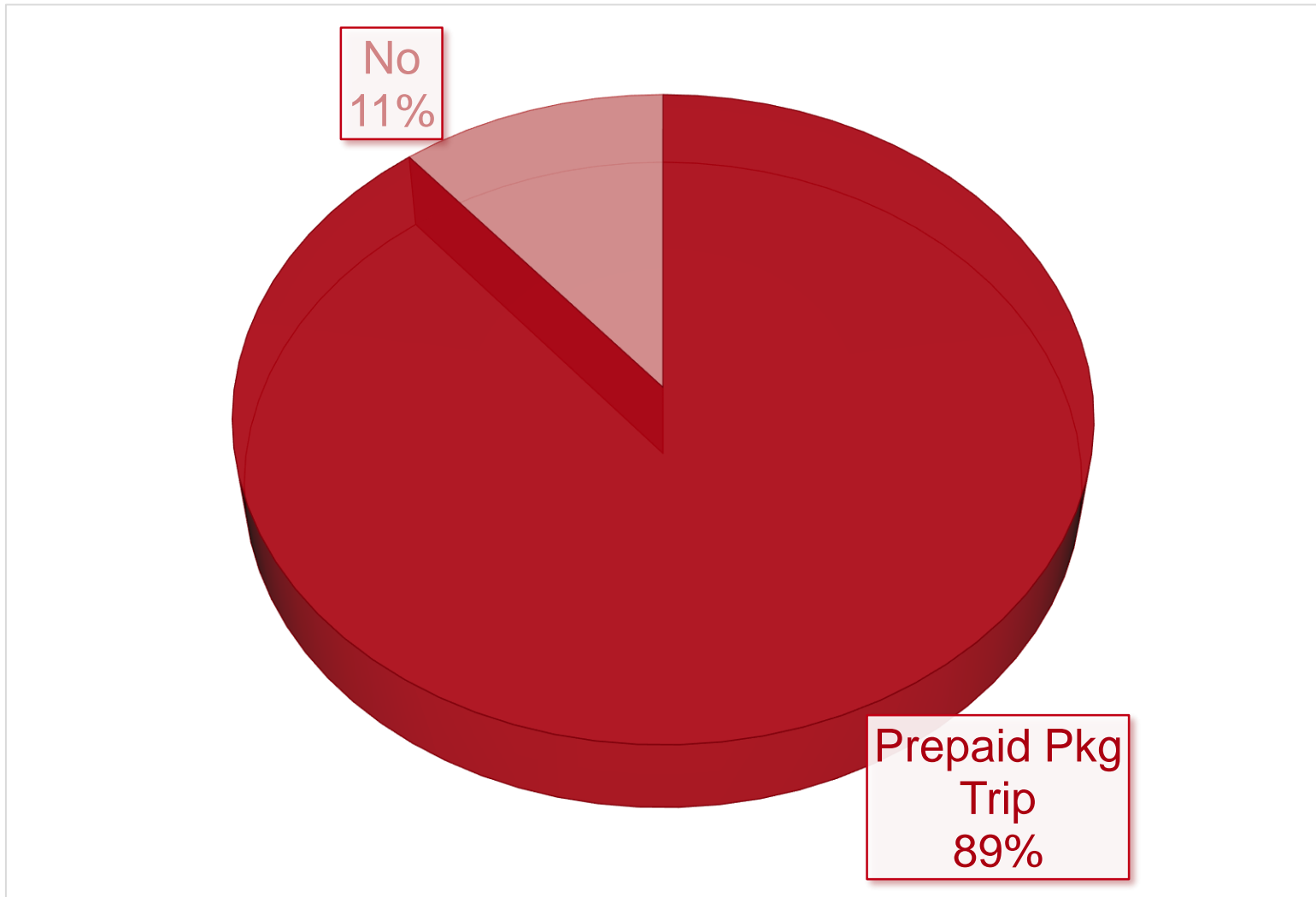


Travel Arrangements - Sources

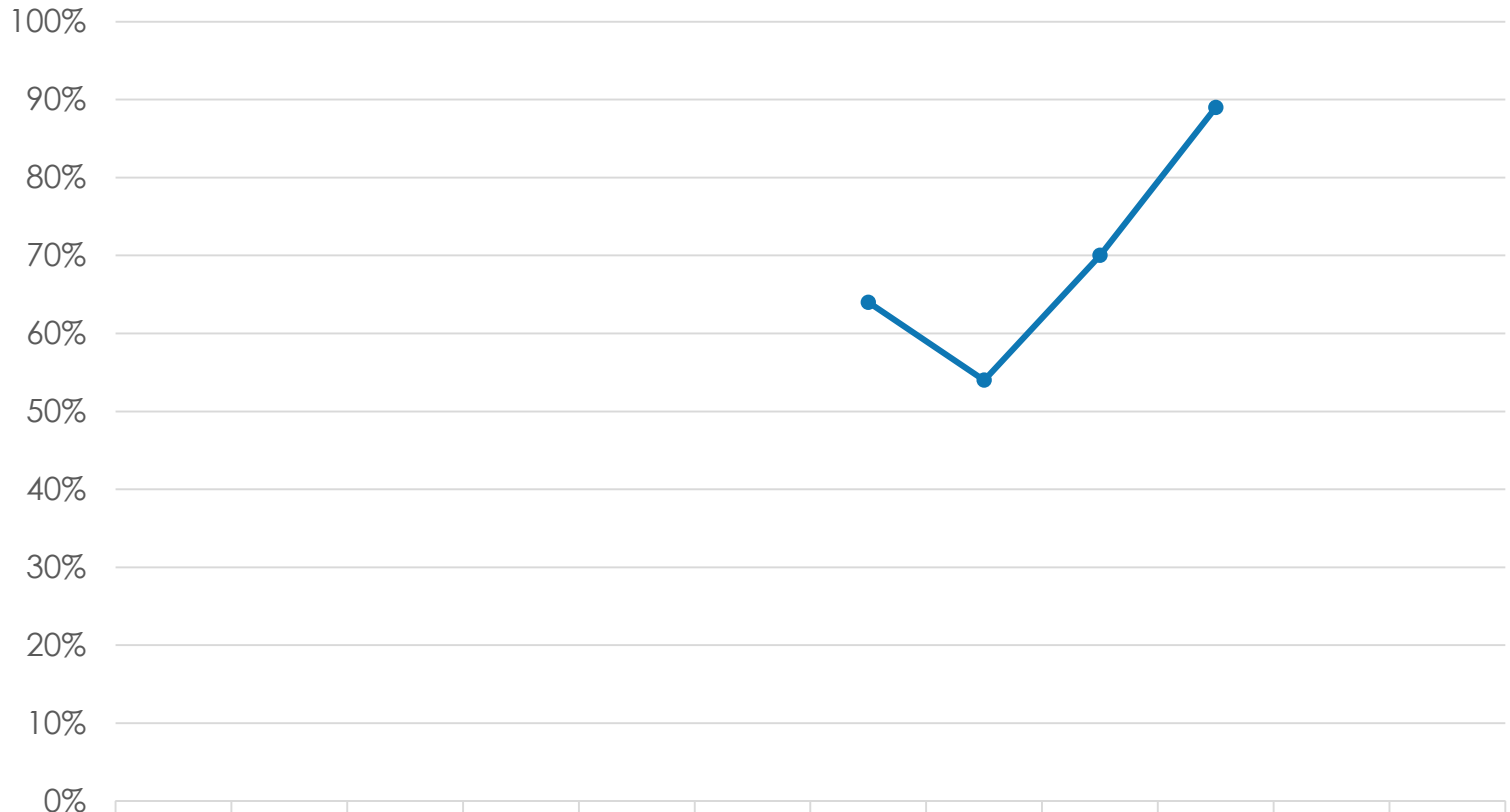


| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Online travel agent | | | | | | | 30% | 23% | 21% | 31% | | |
| Trvl Agt/ Co- Pkg Tour | | | | | | | 27% | 21% | 31% | 36% | | |
| Online 3rd Party | | | | | | | 12% | 9% | 12% | 6% | | |
| Direct Air/ Hotel | | | | | | | 31% | 47% | 36% | 26% | | |

Prepaid Package Trip

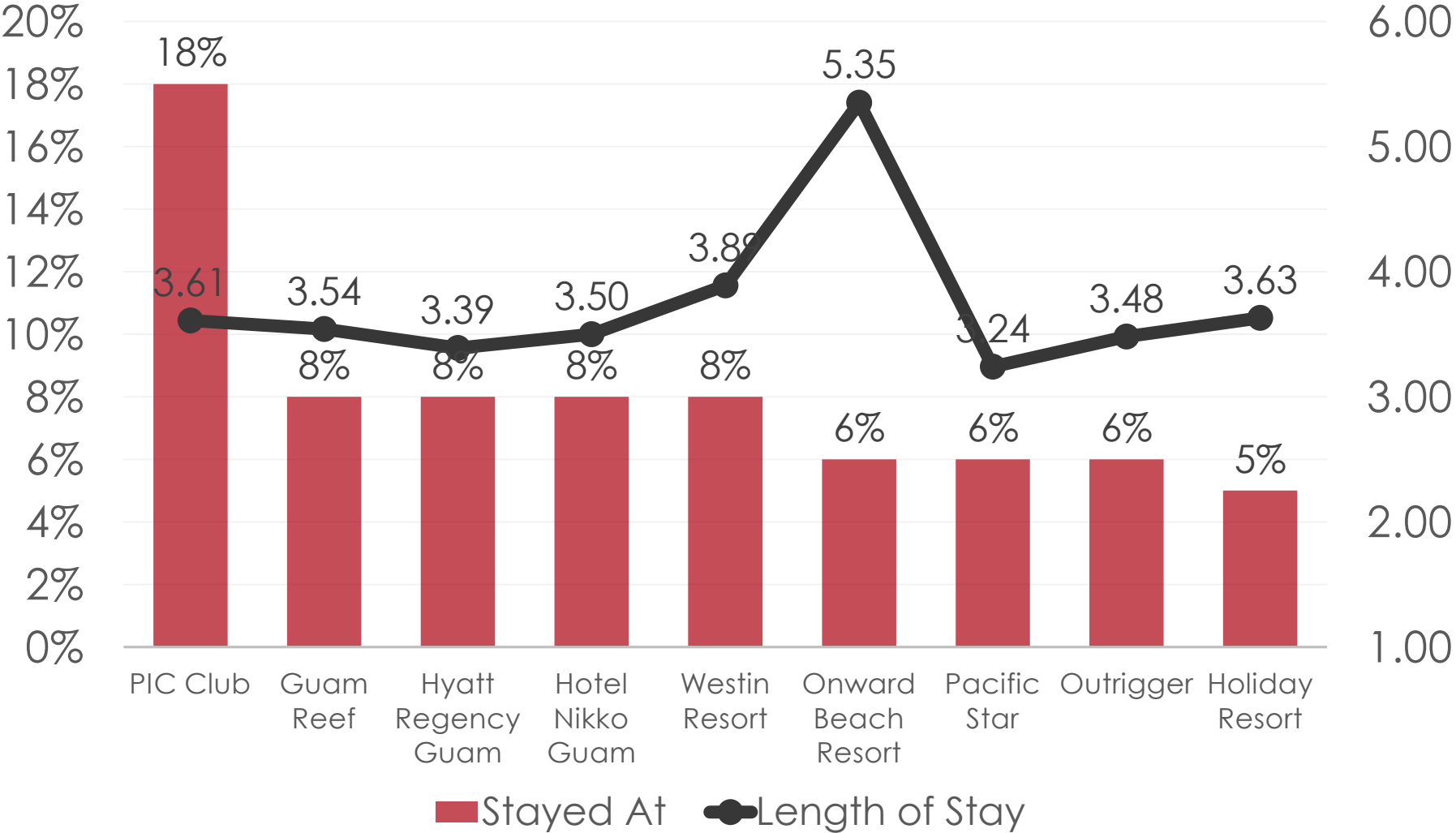


Prepaid Pkg Trip – FY2017 Tracking

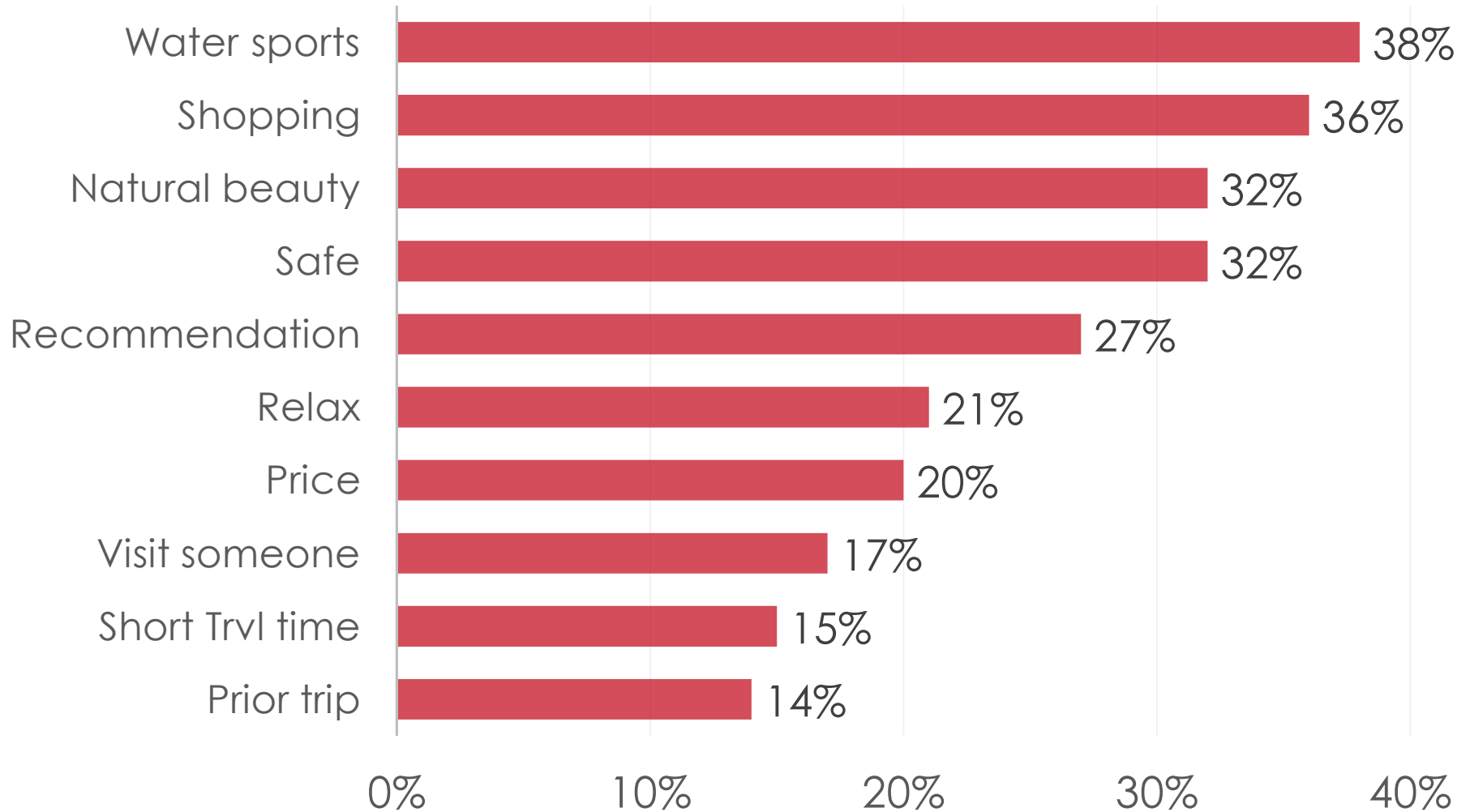


| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Prepaid Pkg | | | | | | | 64% | 54% | 70% | 89% | | |

Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Key Segments

GVB EXIT SURVEY

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

| | | TOTAL | MICE | HONEYMOON | WEDDING | LEISURE | GROUP TOUR | REPEAT VISITOR | FAMILY | FIT |
|-----|---|-------|------|-----------|---------|---------|------------|----------------|--------|-----|
| | | - | - | - | - | - | - | - | - | - |
| Q5A | Water sports (snorkeling, windsurfing, parasailing) | 38% | 20% | 8% | | 31% | 50% | 26% | 37% | 45% |
| | Shopping | 36% | 40% | | | 22% | 59% | 28% | 37% | 34% |
| | It is a safe place to spend a vacation | 32% | | 58% | 67% | 36% | 18% | 23% | 34% | 29% |
| | Beautiful seas, beaches, tropical climate | 32% | | 67% | | 64% | 5% | 21% | 31% | 39% |
| | Recommendation of friend/ relative/ travel agency | 27% | 10% | 8% | | 20% | 18% | 18% | 28% | 16% |
| | Just to relax | 21% | 10% | 25% | | 41% | 5% | 8% | 22% | 24% |
| | Price of the tour package | 20% | | | | 6% | 23% | 23% | 20% | 19% |
| | To visit friends or relatives | 17% | 10% | | 67% | 8% | 23% | 33% | 18% | 15% |
| | Short travel time (not too far from home) | 15% | 20% | | 33% | 19% | 9% | 5% | 14% | 18% |
| | A previous visit | 14% | | | | 8% | 9% | 82% | 15% | 11% |
| | Pleasure/ vacation | 13% | 10% | 33% | | 26% | | 5% | 11% | 20% |
| | Scuba diving | 11% | 10% | | 33% | 4% | 27% | 11% | 11% | 8% |
| | To golf | 7% | 30% | | | 4% | 23% | 5% | 8% | 6% |
| | Career certification/ testing | 5% | | | | | 18% | 7% | 5% | 6% |
| | Honeymoon | 3% | | 100% | | 6% | | | 4% | |
| | Company/ business trip | 2% | 20% | | | 2% | | 2% | 1% | 3% |
| | Convention/ conference/ trade show/ meeting | 2% | 60% | | | | | | 1% | 2% |
| | Incentive trip | 1% | 50% | | | 1% | | | 2% | 2% |
| | My company sponsored me | 1% | 10% | | | | 9% | 3% | 0% | 1% |
| | Organized sporting activity/ event | 1% | | | | 2% | 5% | | 1% | 1% |
| | To Get Married/ attend Wedding | 1% | | | 100% | | | | 1% | 2% |
| | Adventure | 0% | | | | | | | 0% | 1% |
| | Total | 357 | 10 | 12 | 3 | 180 | 22 | 61 | 310 | 117 |

Prepared by Anthology Research

SECTION 3

EXPENDITURES

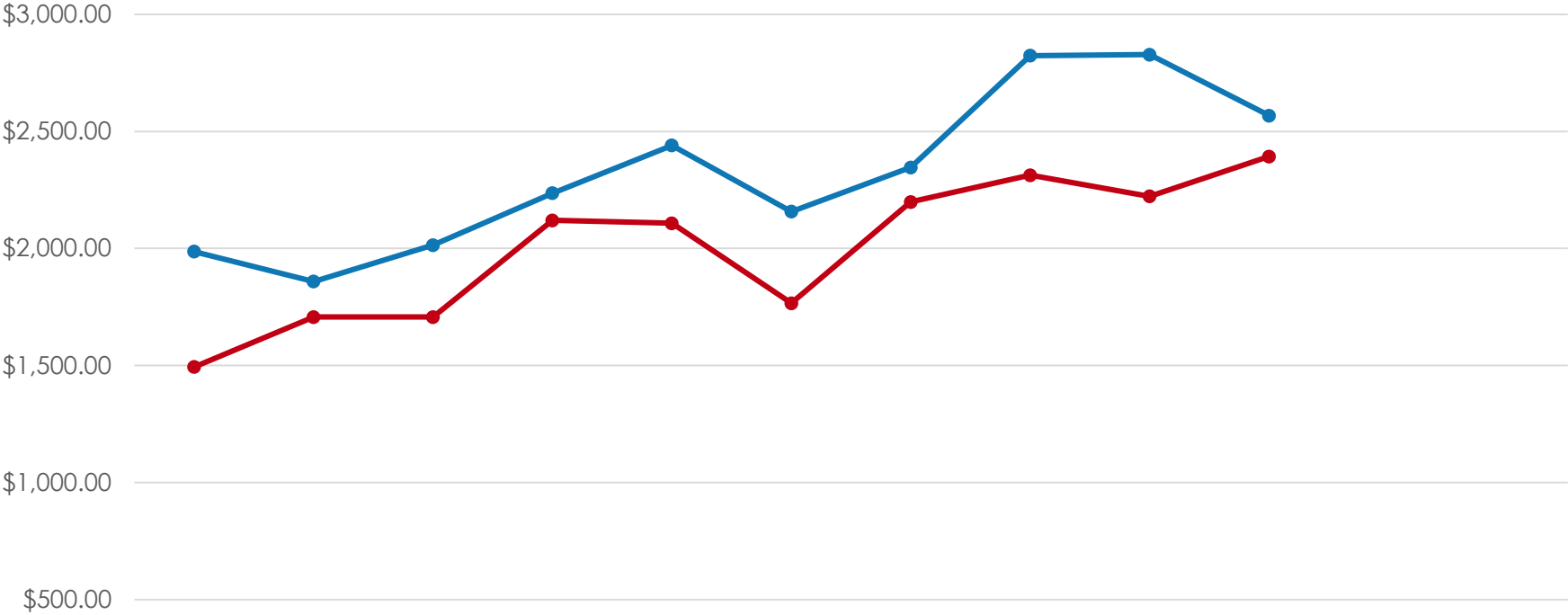
Prepaid Expenditures

EXCHANGE RATE KW1,119.97=\$1

- \$2,567.24 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$878.71 = overall mean average per person prepaid expenditures

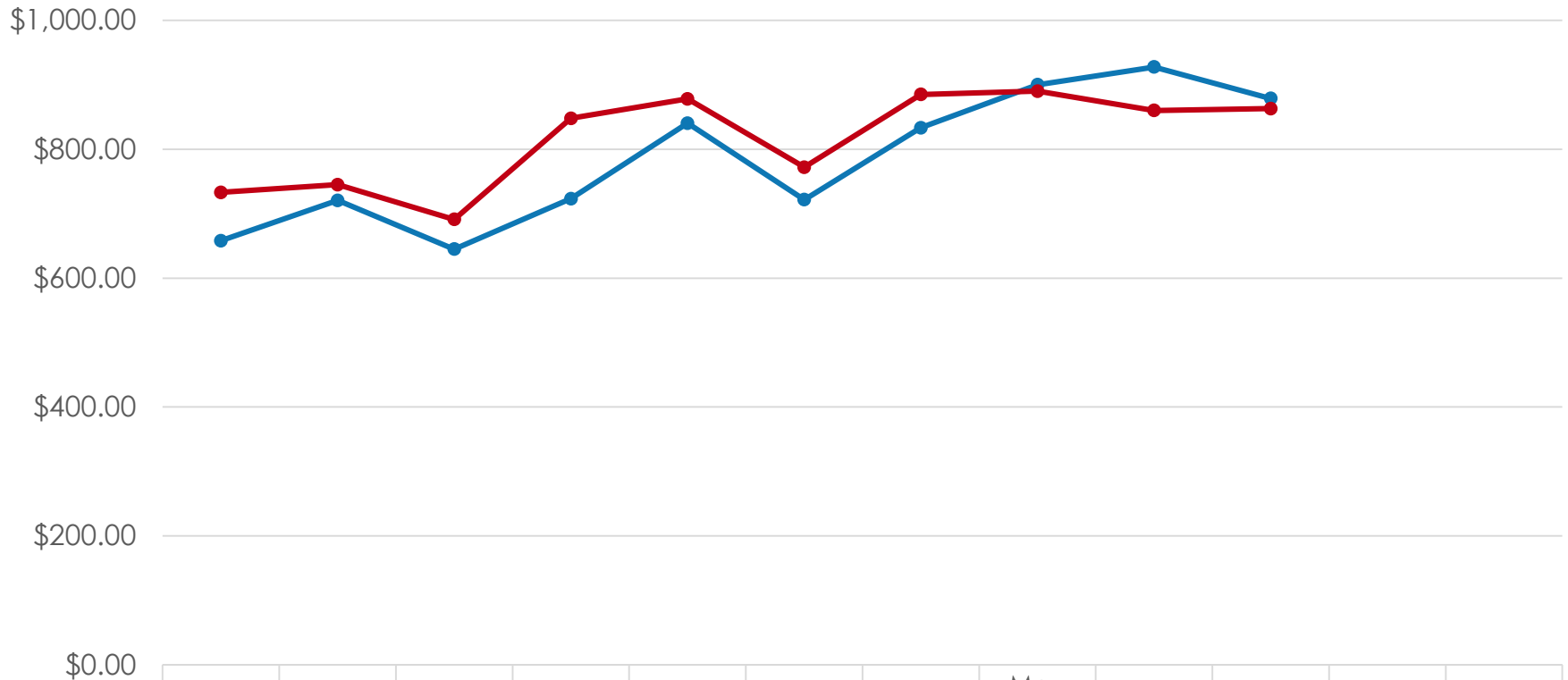
Prepaid Entire Travel Party – FY2017

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 | \$2,157.26 | \$2,346.45 | \$2,823.65 | \$2,827.92 | \$2,567.24 | | |
| MEDIAN | \$1,494.00 | \$1,707.00 | \$1,707.00 | \$2,120.00 | \$2,108.00 | \$1,766.00 | \$2,199.00 | \$2,313.00 | \$2,223.00 | \$2,393.00 | | |

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 | \$721.76 | \$833.23 | \$900.01 | \$927.63 | \$878.71 | | |
| MEDIAN | \$733.00 | \$745.00 | \$691.00 | \$848.00 | \$878.00 | \$772.00 | \$885.00 | \$890.00 | \$860.00 | \$863.00 | | |

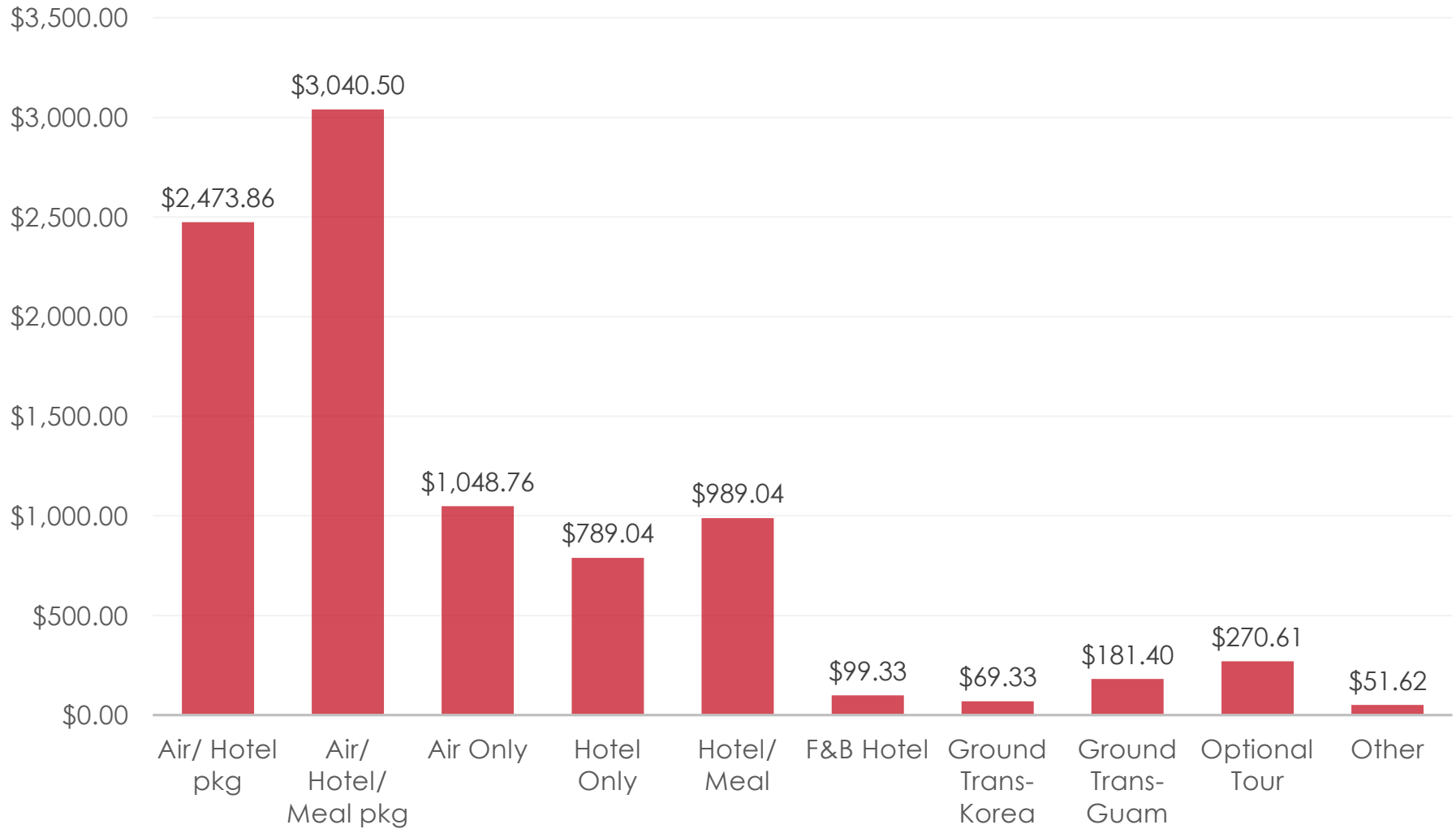
Prepaid Per Person– Key Segments

**GVB EXIT SURVEY
Q10A PREPAID - PER PERSON:**

| | | TOTAL | MICE | HONEYMOON | WEDDING | LEISURE | GROUP TOUR | REPEAT VISITOR | FAMILY | FIT |
|------------|--------|----------|----------|------------|----------|----------|------------|----------------|----------|----------|
| | | - | - | - | - | - | - | - | - | - |
| PREPAID PP | Mean | \$878.71 | \$856.42 | \$1,436.27 | \$833.36 | \$899.01 | \$855.75 | \$852.54 | \$901.51 | \$794.38 |
| | Median | \$863 | \$863 | \$1,429 | \$893 | \$887 | \$841 | \$857 | \$893 | \$774 |

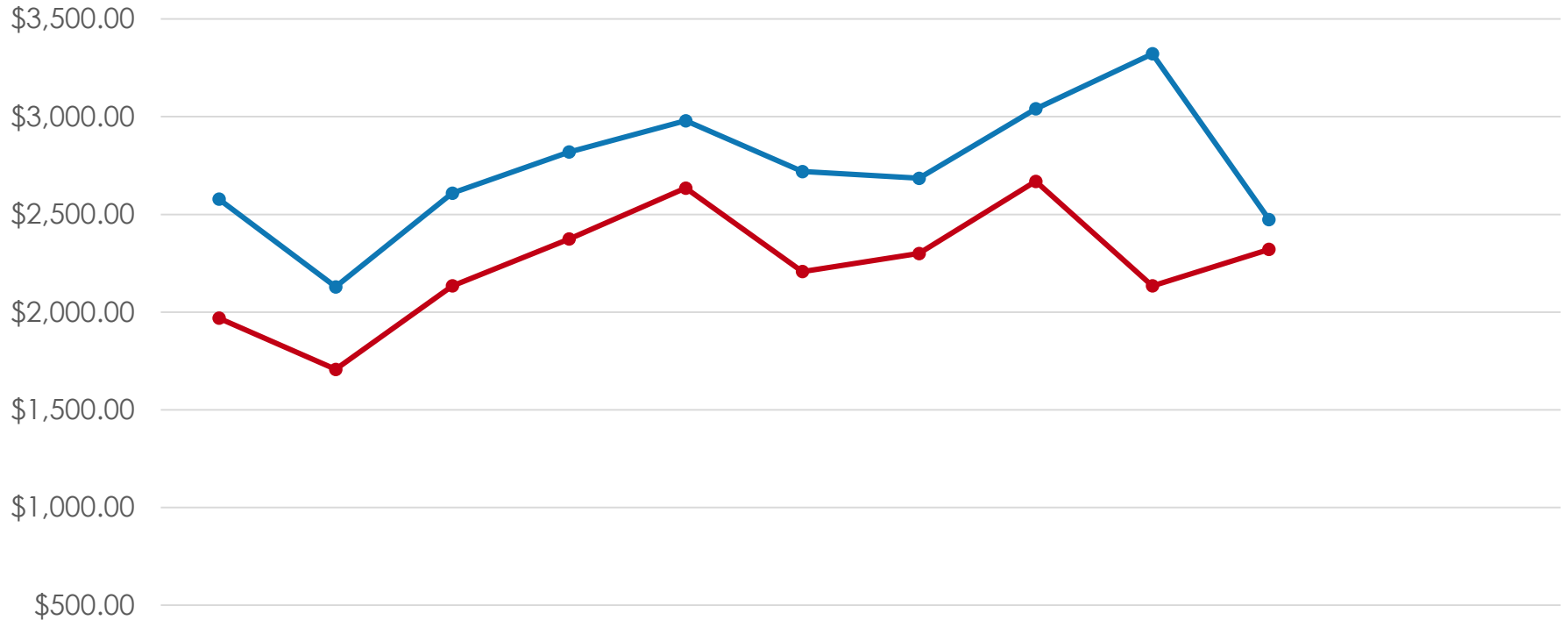
Prepared by Anthology Research

Prepaid Expenses by Category – MEAN Entire Travel Party



Prepaid- FY2017 Tracking

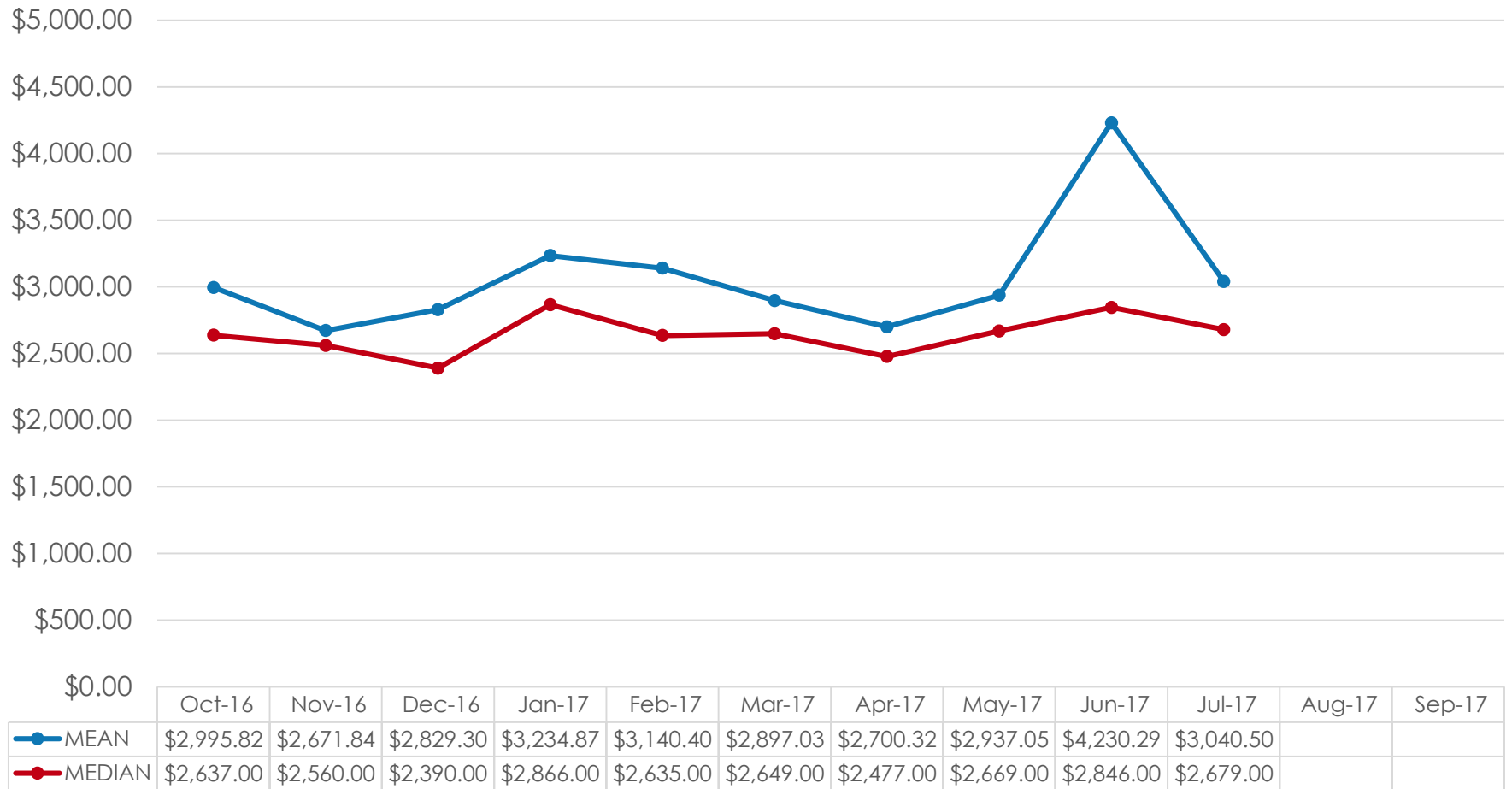
Airfare & Accommodation Packages



| | 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 | \$2,719.39 | \$2,684.99 | \$3,040.24 | \$3,322.35 | \$2,473.86 | | |
| MEDIAN | \$1,969.00 | \$1,707.00 | \$2,134.00 | \$2,374.00 | \$2,635.00 | \$2,207.00 | \$2,300.00 | \$2,669.00 | \$2,134.00 | \$2,321.00 | | |

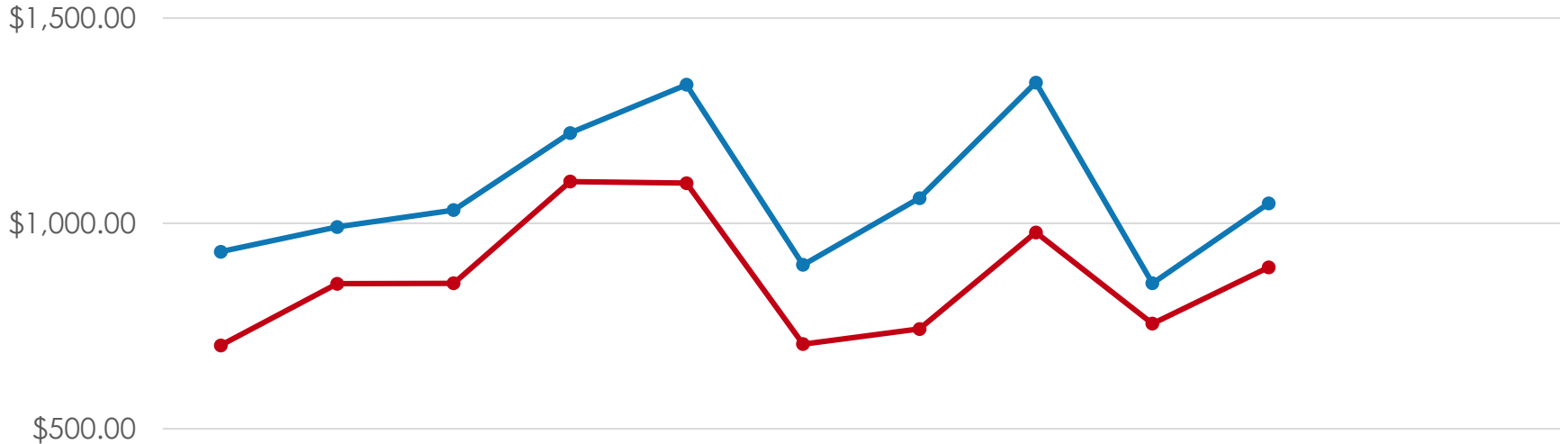
Prepaid- FY2017 Tracking

Airfare & Accommodation W/ Meal Packages



Prepaid- FY2017 Tracking

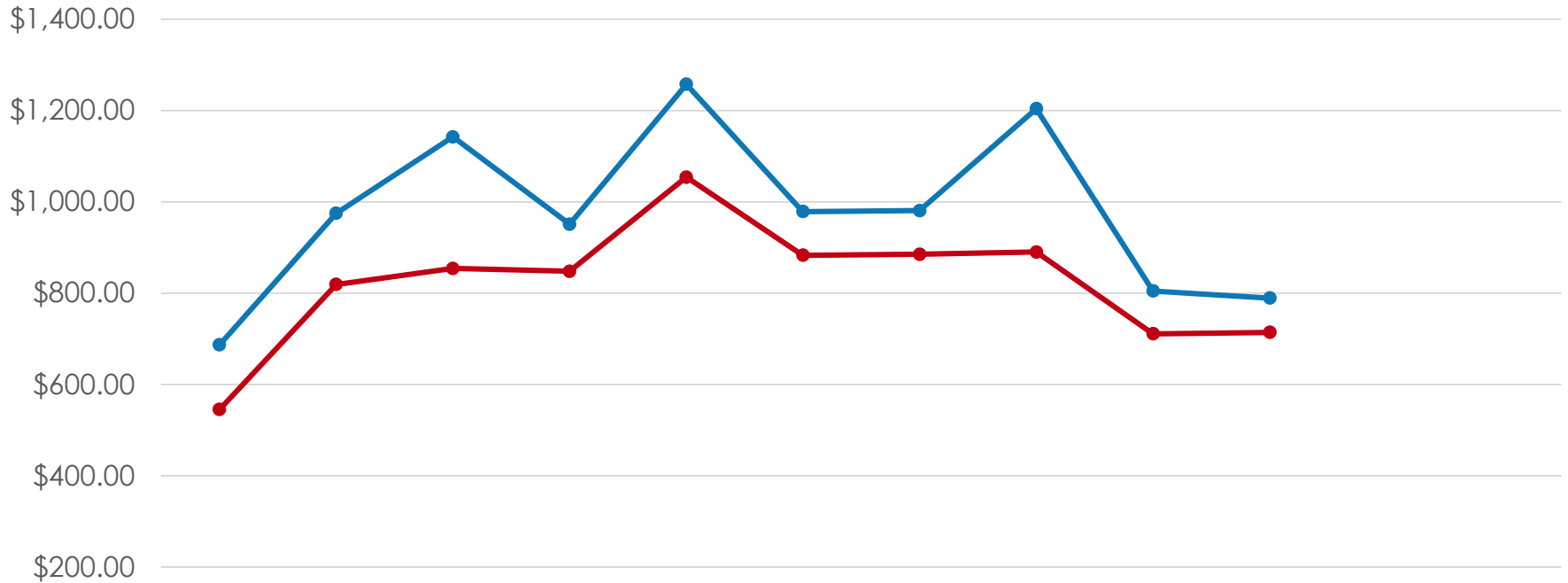
Airfare Only



| | 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 | \$899.01 | \$1,061.69 | \$1,342.90 | \$854.20 | \$1,048.76 | | |
| MEDIAN | \$703.00 | \$853.00 | \$854.00 | \$1,102.00 | \$1,098.00 | \$706.00 | \$743.00 | \$978.00 | \$756.00 | \$893.00 | | |

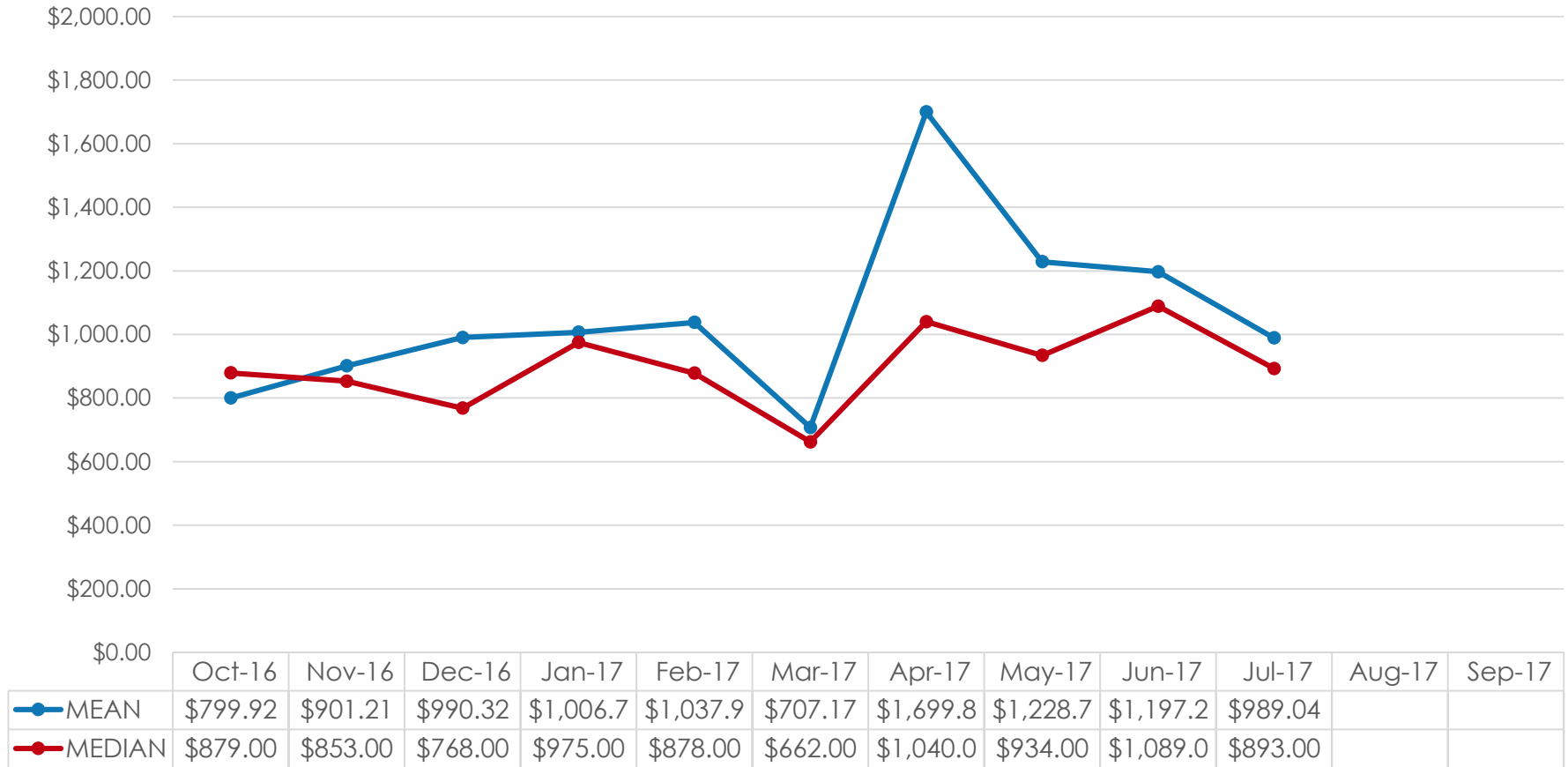
Prepaid- FY2017 Tracking

Accommodations Only



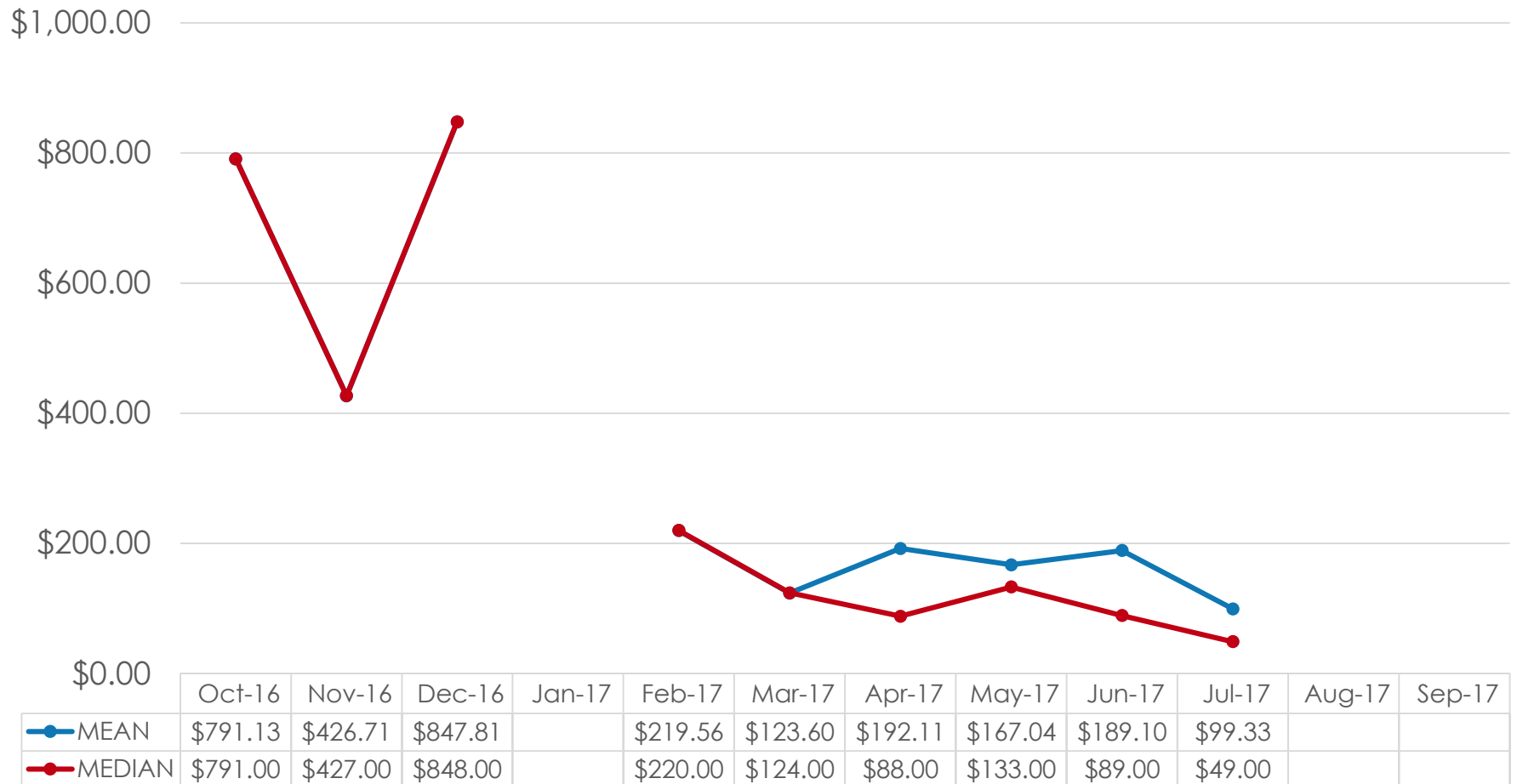
| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|----------|----------|------------|----------|------------|----------|----------|------------|----------|----------|--------|--------|
| MEAN | \$686.81 | \$974.76 | \$1,142.28 | \$951.10 | \$1,257.38 | \$978.59 | \$980.77 | \$1,204.05 | \$804.84 | \$789.04 | | |
| MEDIAN | \$545.00 | \$819.00 | \$854.00 | \$848.00 | \$1,054.00 | \$883.00 | \$885.00 | \$890.00 | \$711.00 | \$714.00 | | |

Prepaid- FY2017 Tracking Accommodations w/ Meal Only



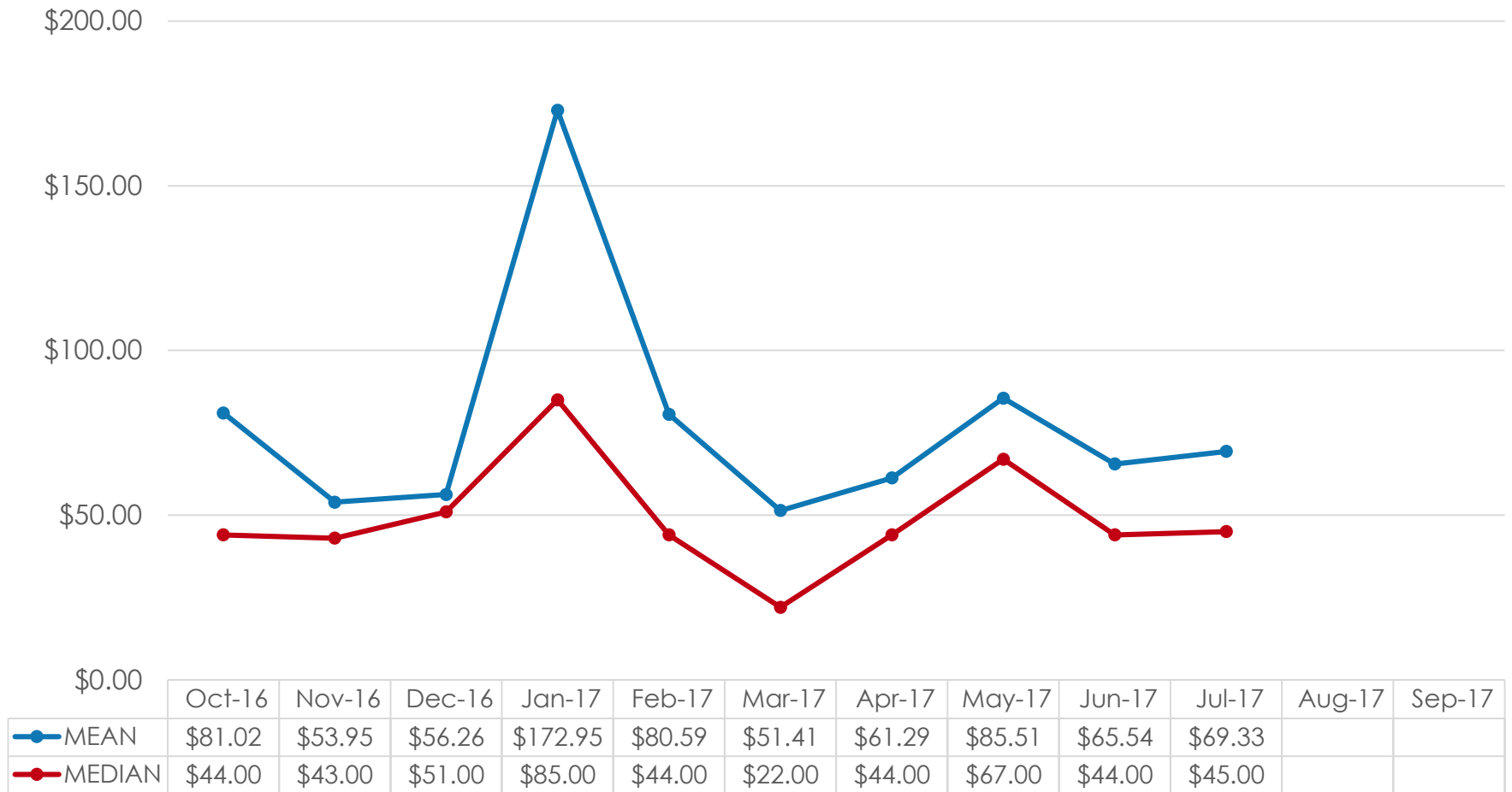
Prepaid- FY2017 Tracking

Food & Beverage in Hotel



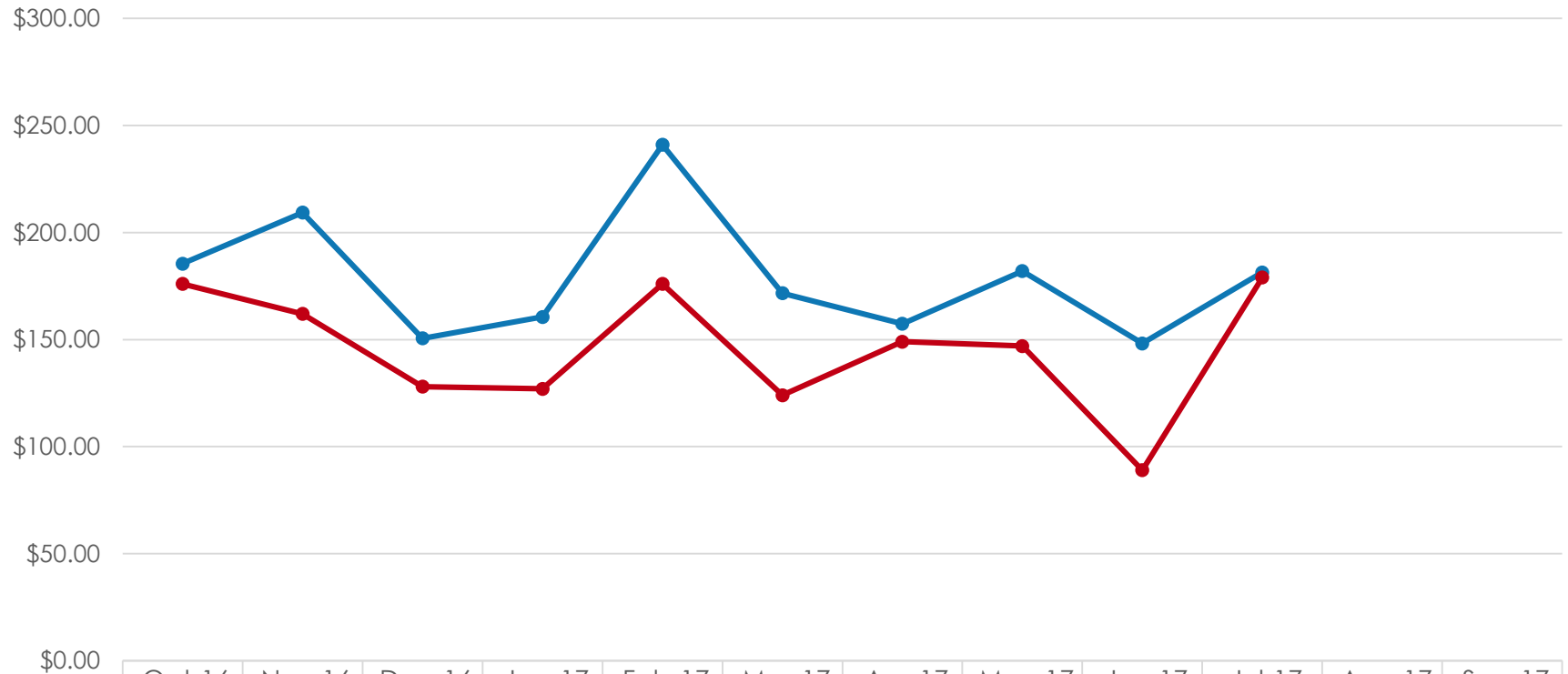
Prepaid- FY2017 Tracking

Ground Transportation - Korea



Prepaid- FY2017 Tracking

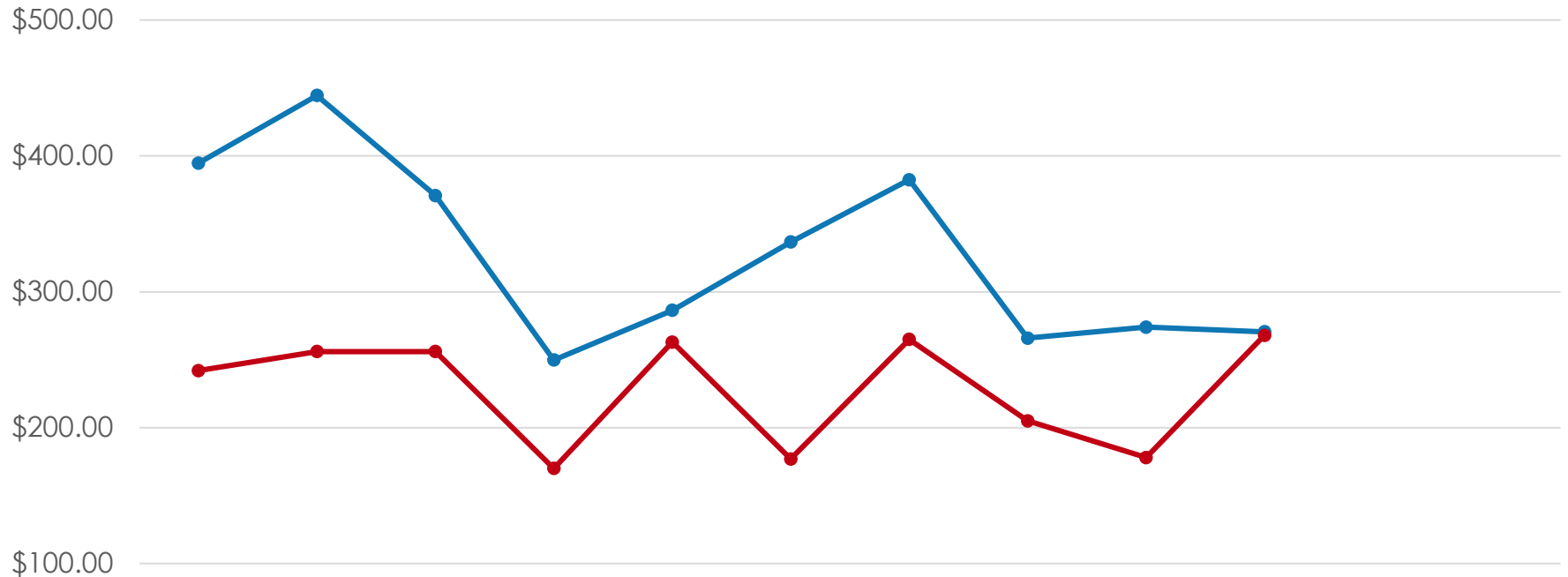
Ground Transportation - Guam



| | 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 | \$171.69 | \$157.41 | \$181.98 | \$148.24 | \$181.40 | | |
| ● MEDIAN | \$176.00 | \$162.00 | \$128.00 | \$127.00 | \$176.00 | \$124.00 | \$149.00 | \$147.00 | \$89.00 | \$179.00 | | |

Prepaid– FY2017 Tracking

Optional tours/ Activities

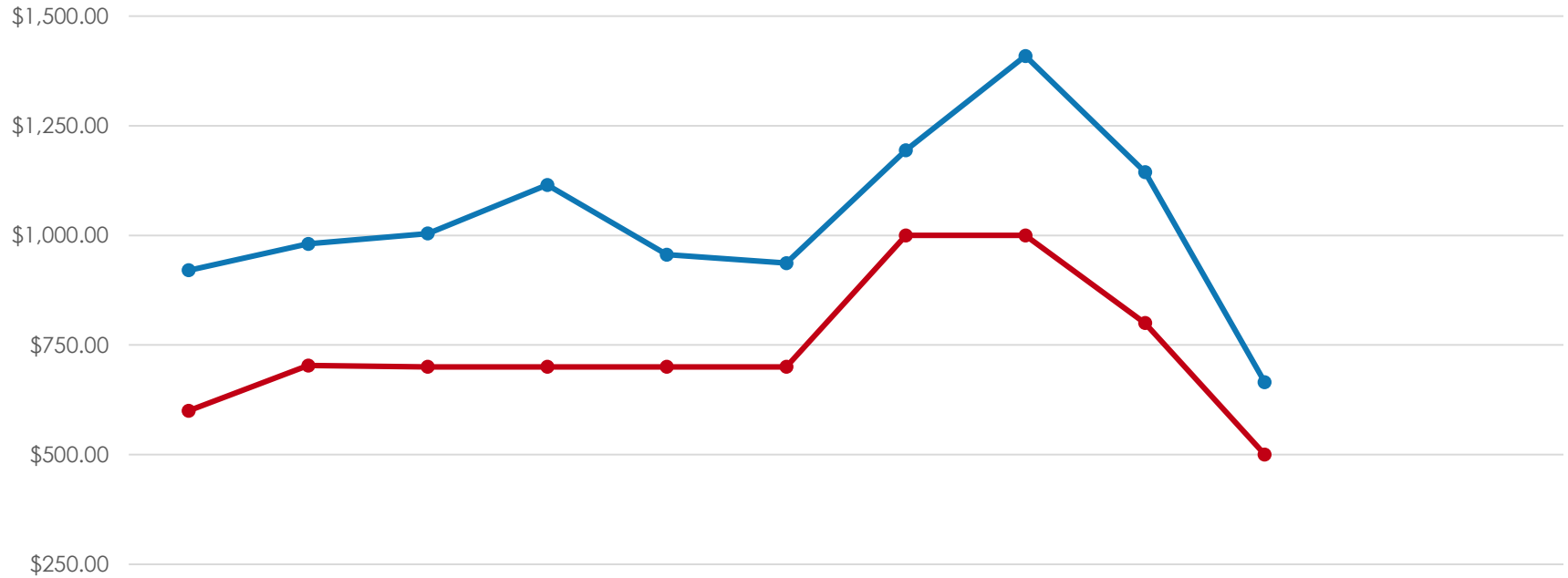


| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|--------|--------|
| MEAN | \$394.68 | \$444.49 | \$370.79 | \$249.85 | \$286.33 | \$336.64 | \$382.43 | \$265.87 | \$274.04 | \$270.61 | | |
| MEDIAN | \$242.00 | \$256.00 | \$256.00 | \$170.00 | \$263.00 | \$177.00 | \$265.00 | \$205.00 | \$178.00 | \$268.00 | | |

On-Island Expenditures

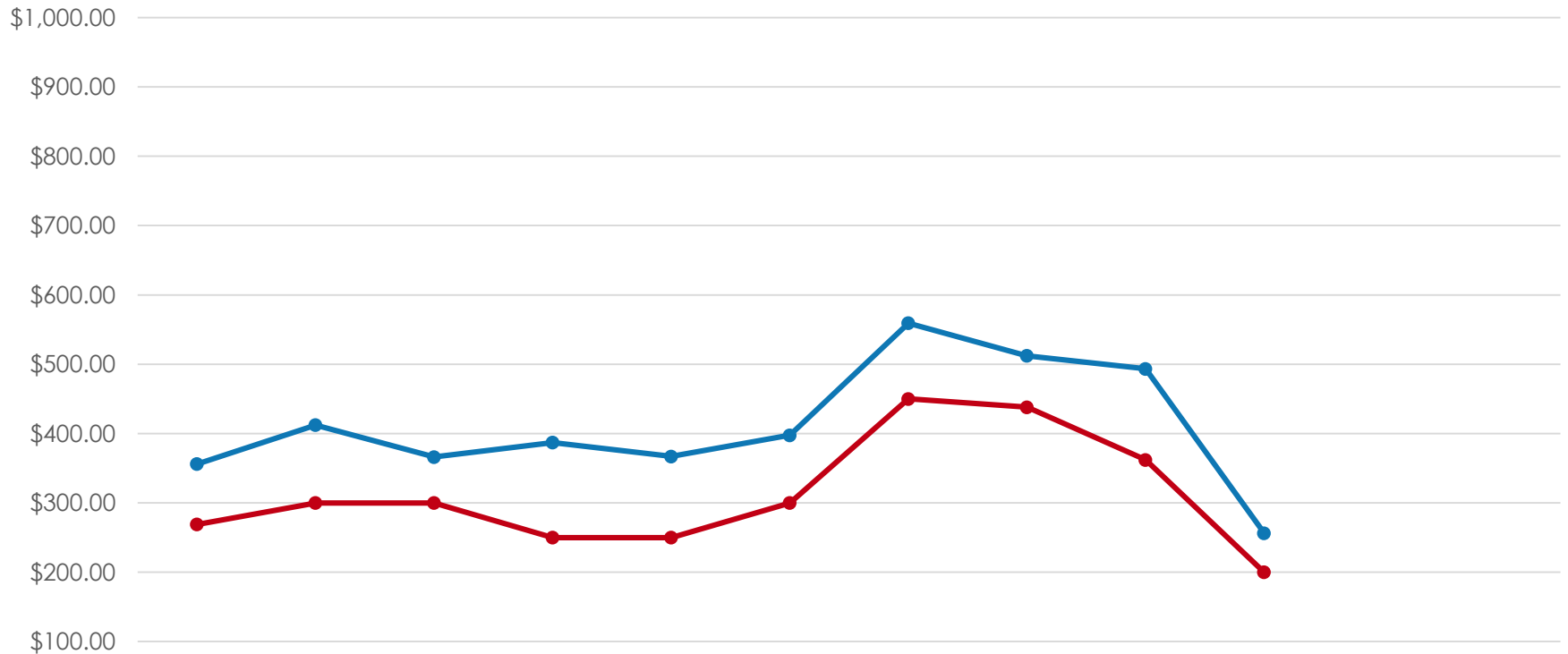
- \$665.25 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$256.35 = overall mean average per person prepaid expenditures

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 | \$1,004.04 | \$1,114.87 | \$955.97 | \$936.57 | \$1,194.12 | \$1,409.05 | \$1,144.30 | \$665.25 | | |
| ● MEDIAN | \$600.00 | \$703.00 | \$700.00 | \$700.00 | \$700.00 | \$700.00 | \$1,000.00 | \$1,000.00 | \$800.00 | \$500.00 | | |

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 | \$397.56 | \$559.29 | \$512.14 | \$493.47 | \$256.35 | | |
| MEDIAN | \$269.00 | \$300.00 | \$300.00 | \$250.00 | \$250.00 | \$300.00 | \$450.00 | \$438.00 | \$362.00 | \$200.00 | | |

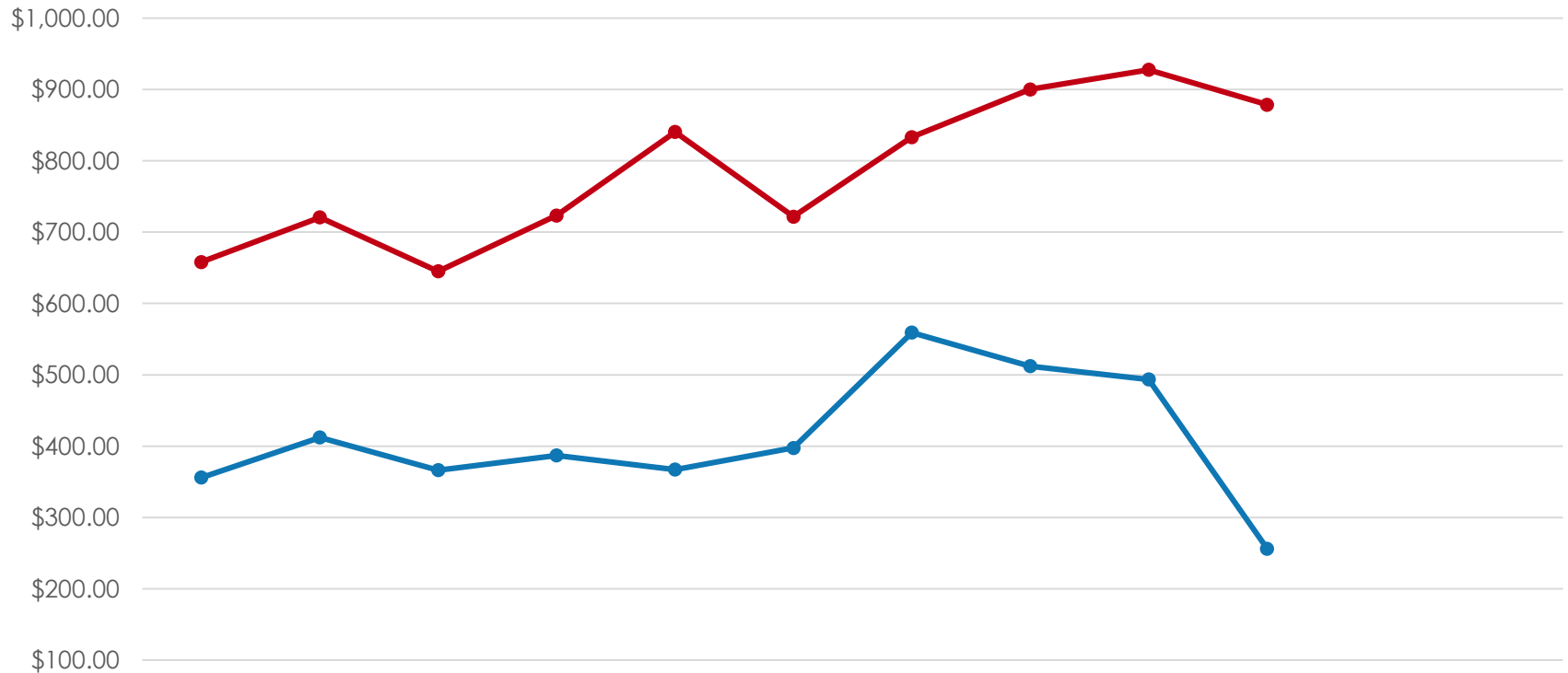
On-Island Per Person – Key Segments

GVB EXIT SURVEY
Q11A ONISLE EXPENDITURE- PER PERSO

| | | TOTAL | MICE | HONEYMOON | WEDDING | LEISURE | GROUP TOUR | REPEAT VISITOR | FAMILY | FIT |
|-----------|--------|----------|----------|-----------|----------|----------|------------|----------------|----------|----------|
| | | - | - | - | - | - | - | - | - | - |
| ONISLE PP | Mean | \$256.35 | \$211.67 | \$612.50 | \$225.00 | \$313.77 | \$198.86 | \$250.81 | \$234.80 | \$283.23 |
| | Median | \$200 | \$233 | \$625 | \$175 | \$265 | \$188 | \$200 | \$200 | \$250 |

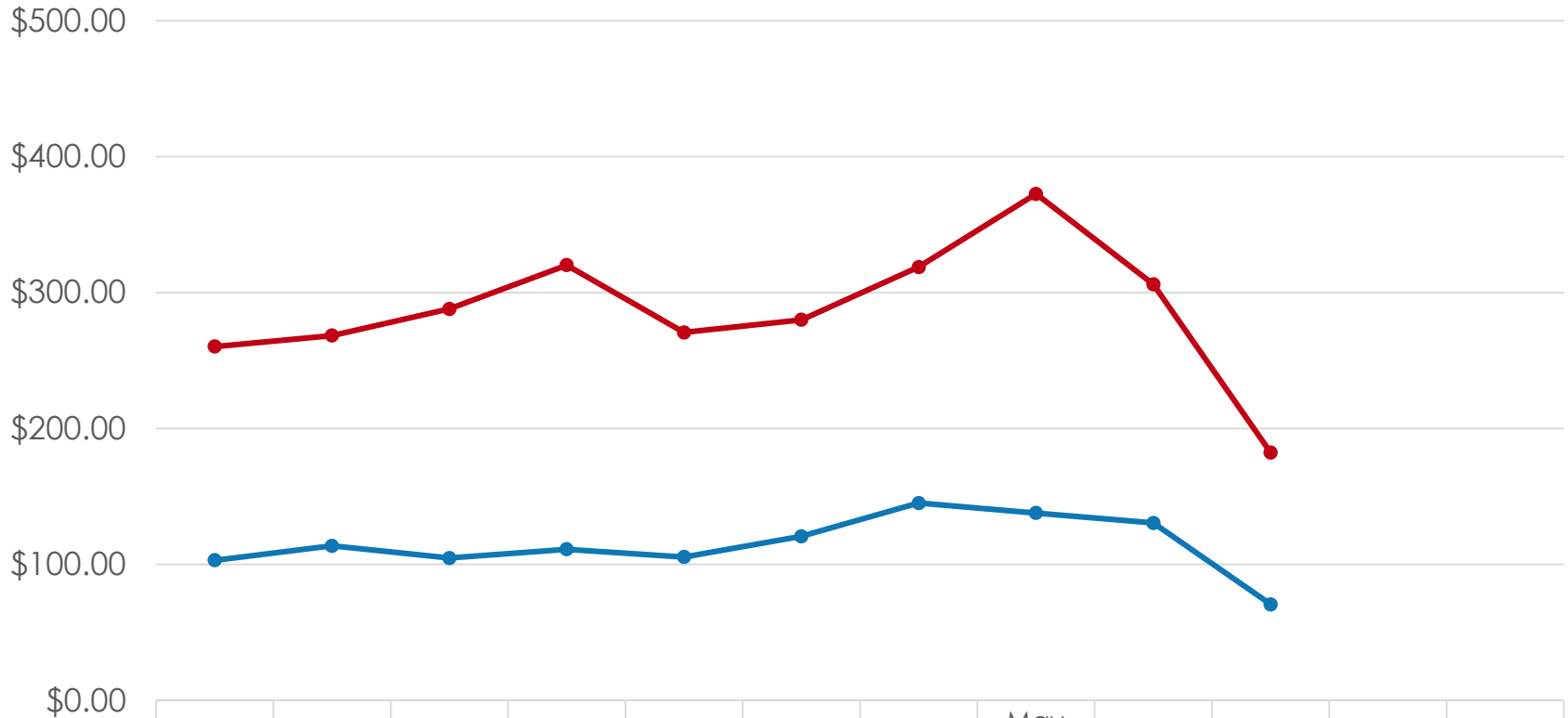
Prepared by Anthology Research

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 | \$397.56 | \$559.29 | \$512.14 | \$493.47 | \$256.35 | | |
| Prepaid | \$658.04 | \$720.62 | \$645.02 | \$723.26 | \$840.37 | \$721.76 | \$833.23 | \$900.01 | \$927.63 | \$878.71 | | |

On-Island Per Day Spending – FY2017 Tracking MEAN



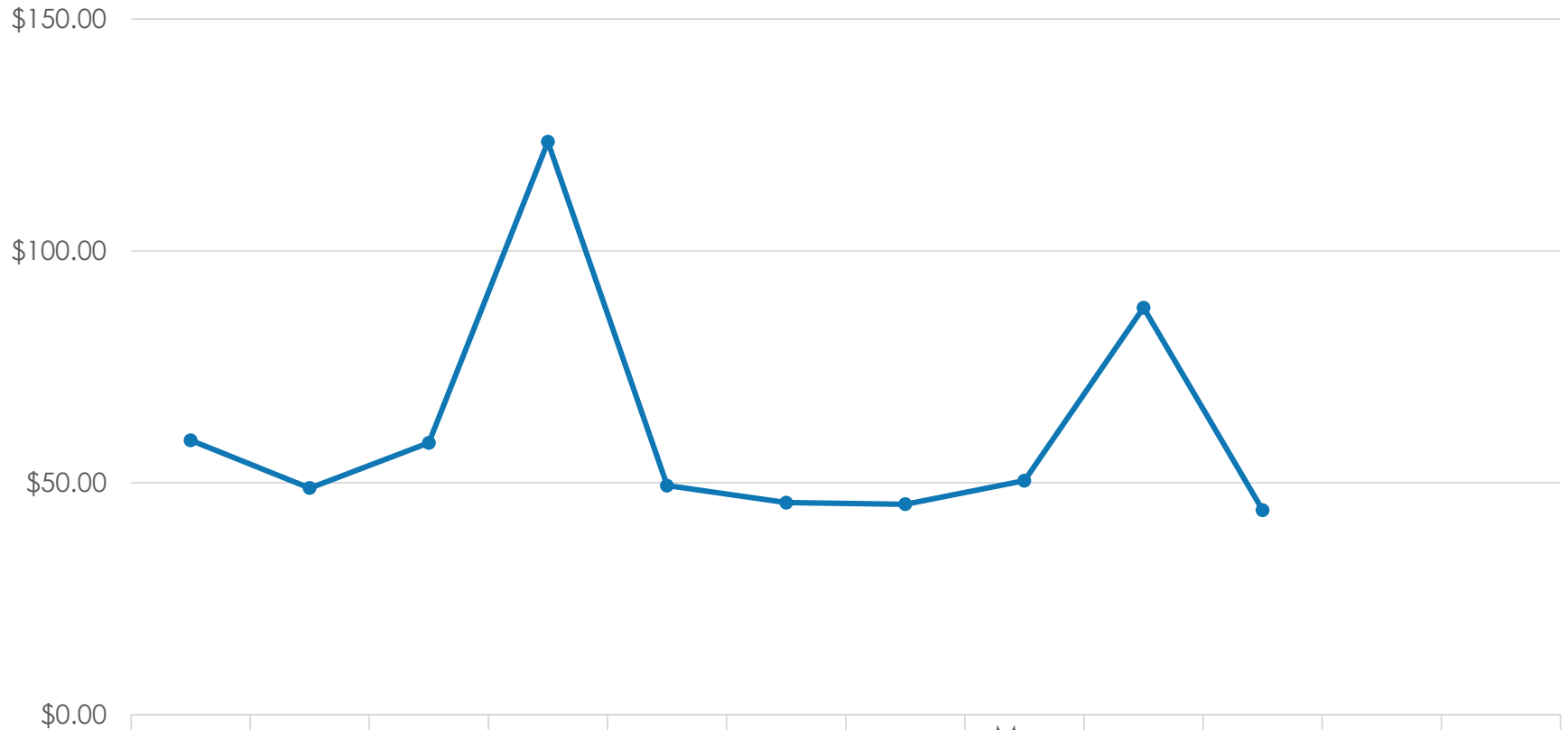
| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|--------|--------|
| Per Person | \$103.06 | \$113.69 | \$104.72 | \$111.17 | \$105.45 | \$120.60 | \$145.12 | \$137.78 | \$130.47 | \$70.57 | | |
| Travel Party | \$260.30 | \$268.39 | \$287.95 | \$320.20 | \$270.68 | \$279.99 | \$318.80 | \$372.56 | \$306.08 | \$182.24 | | |

On-Island Expenses by Category – MEAN Entire Travel Party



On-Island – FY2017 Tracking

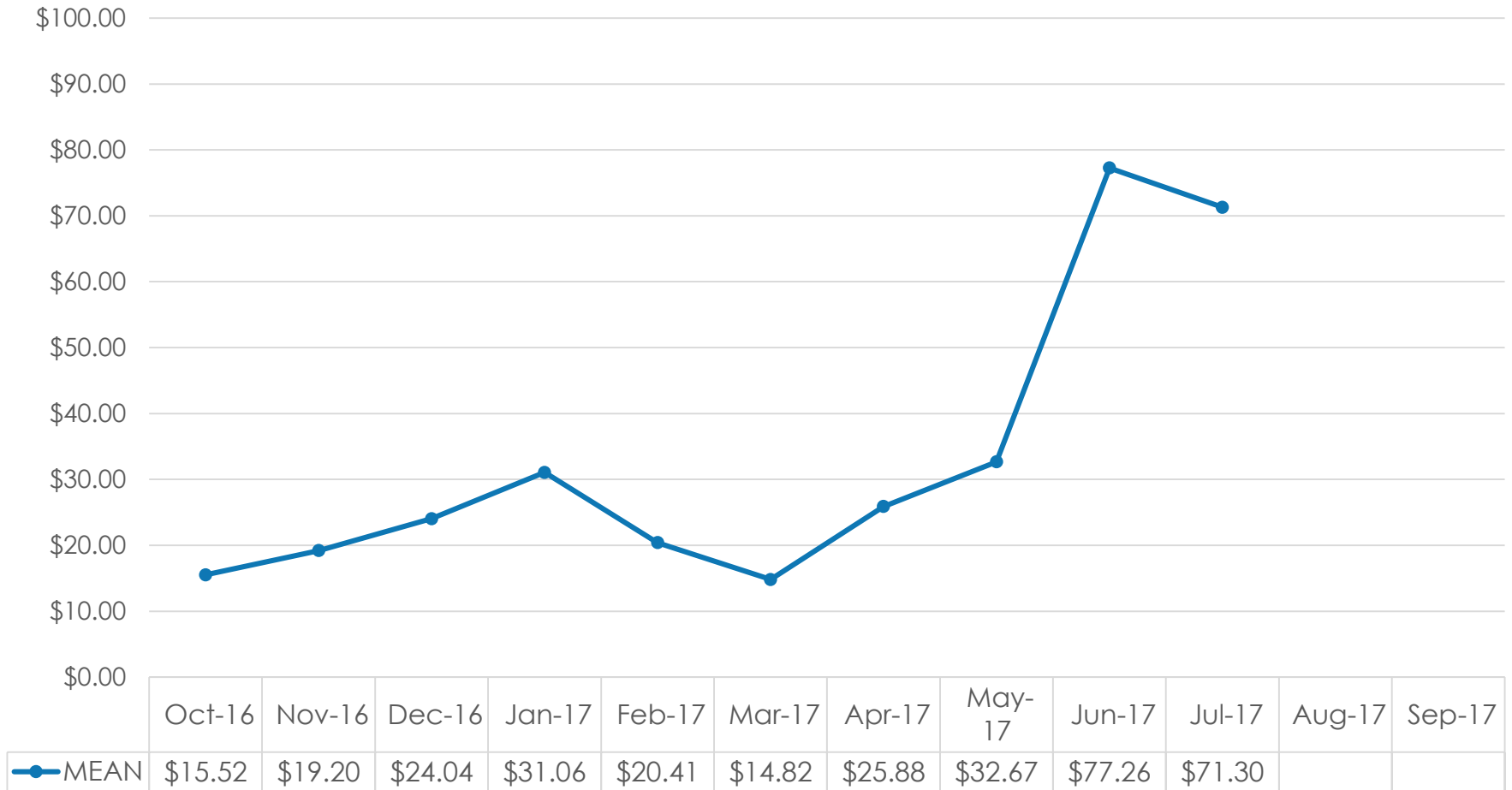
Food & Beverage - Hotel



| | 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 | \$45.71 | \$45.37 | \$50.47 | \$87.76 | \$44.08 | | |

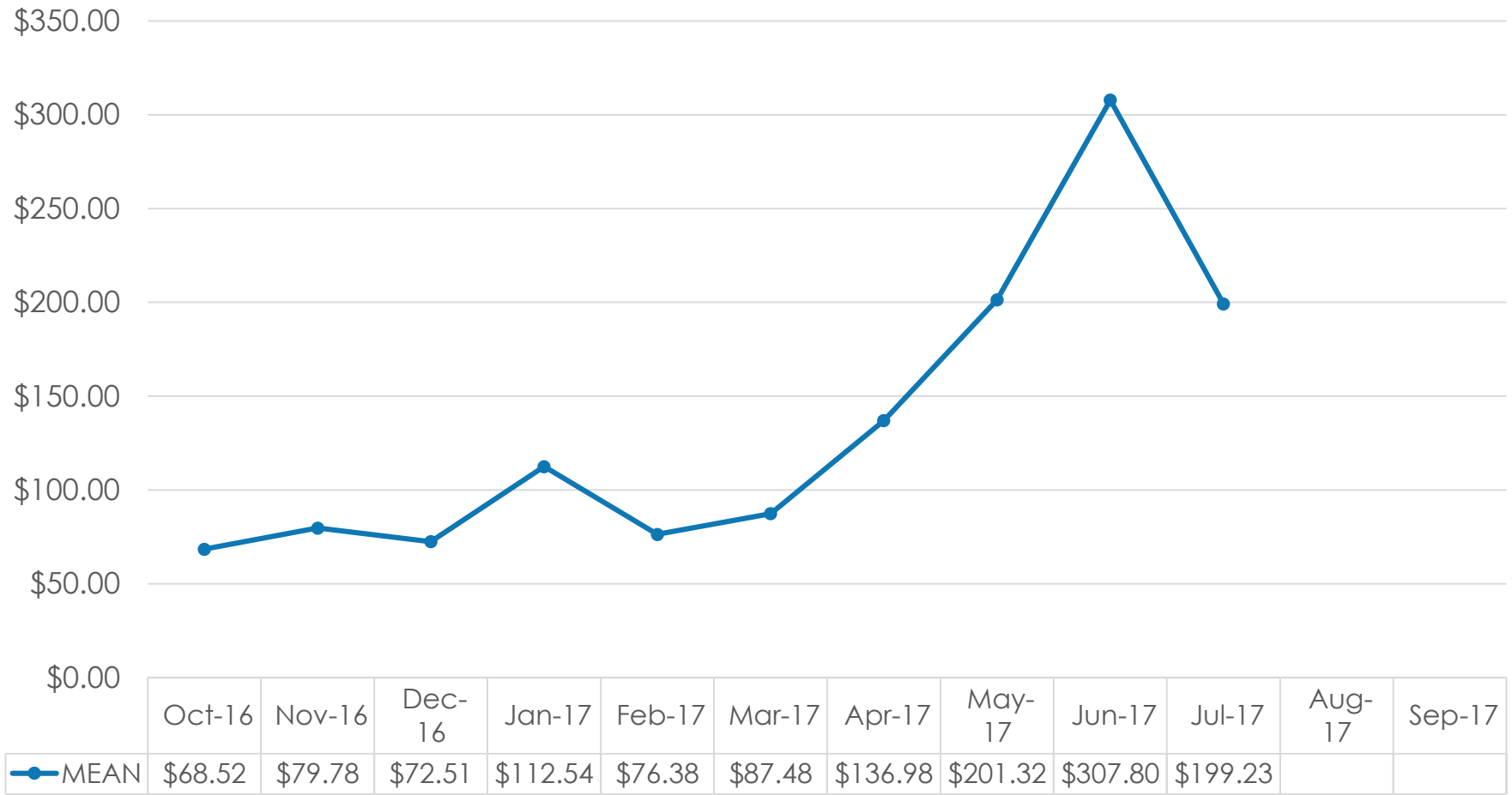
On-Island – FY2017 Tracking

Food & Beverage – Fast Food/ Convenience Store



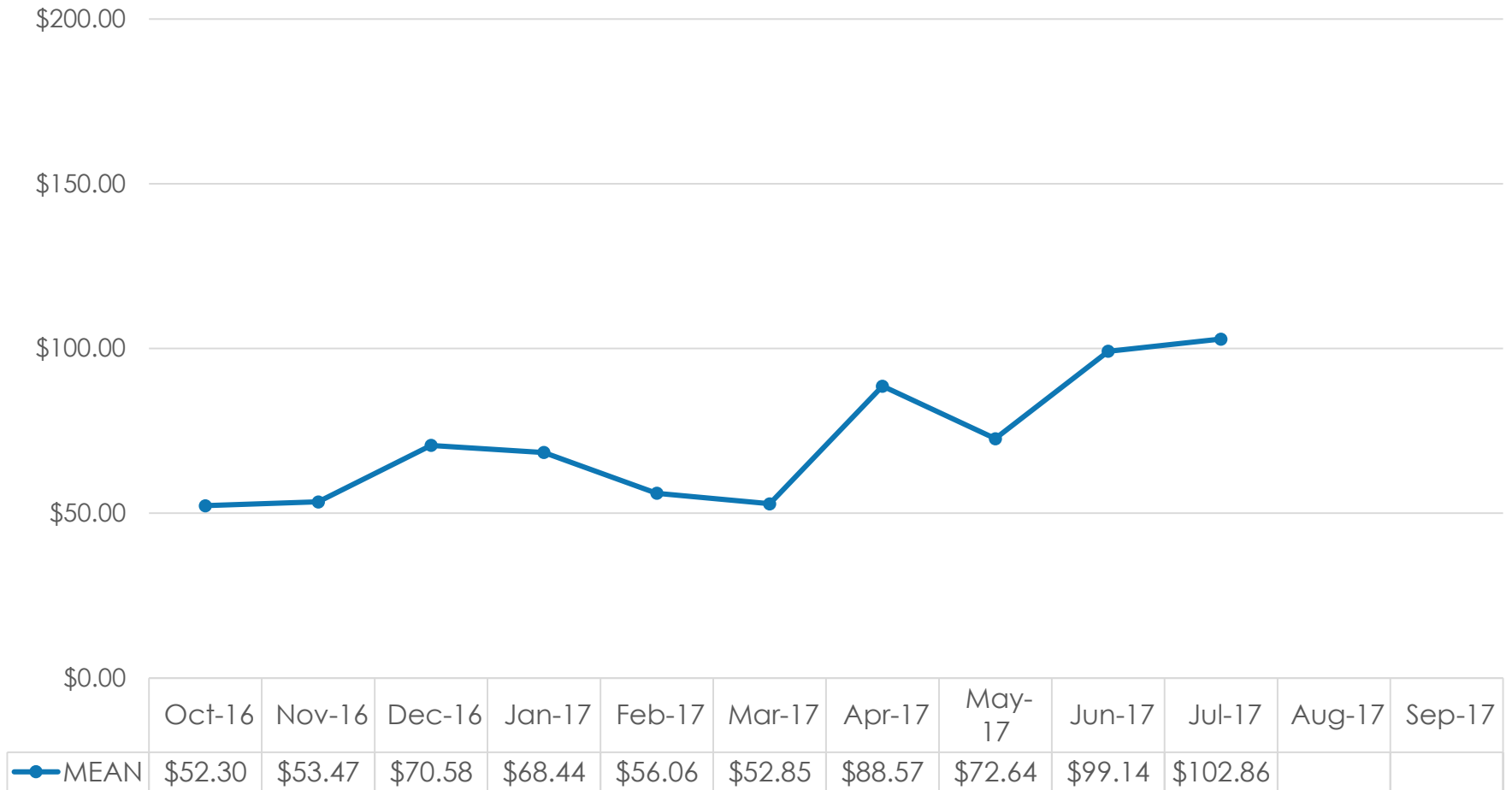
On-Island – FY2017 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



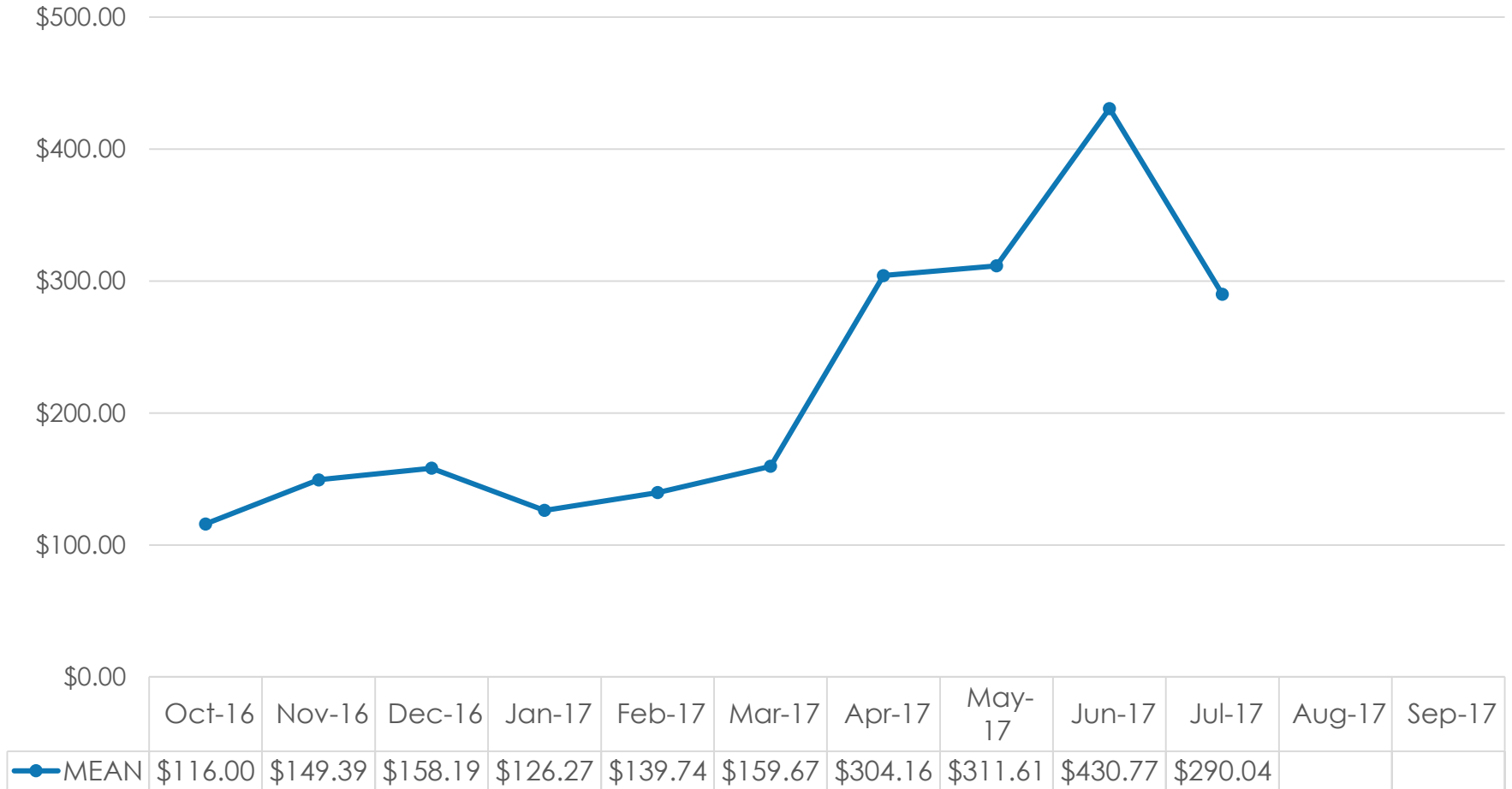
On-Island – FY2017 Tracking

Optional tour/ Activities



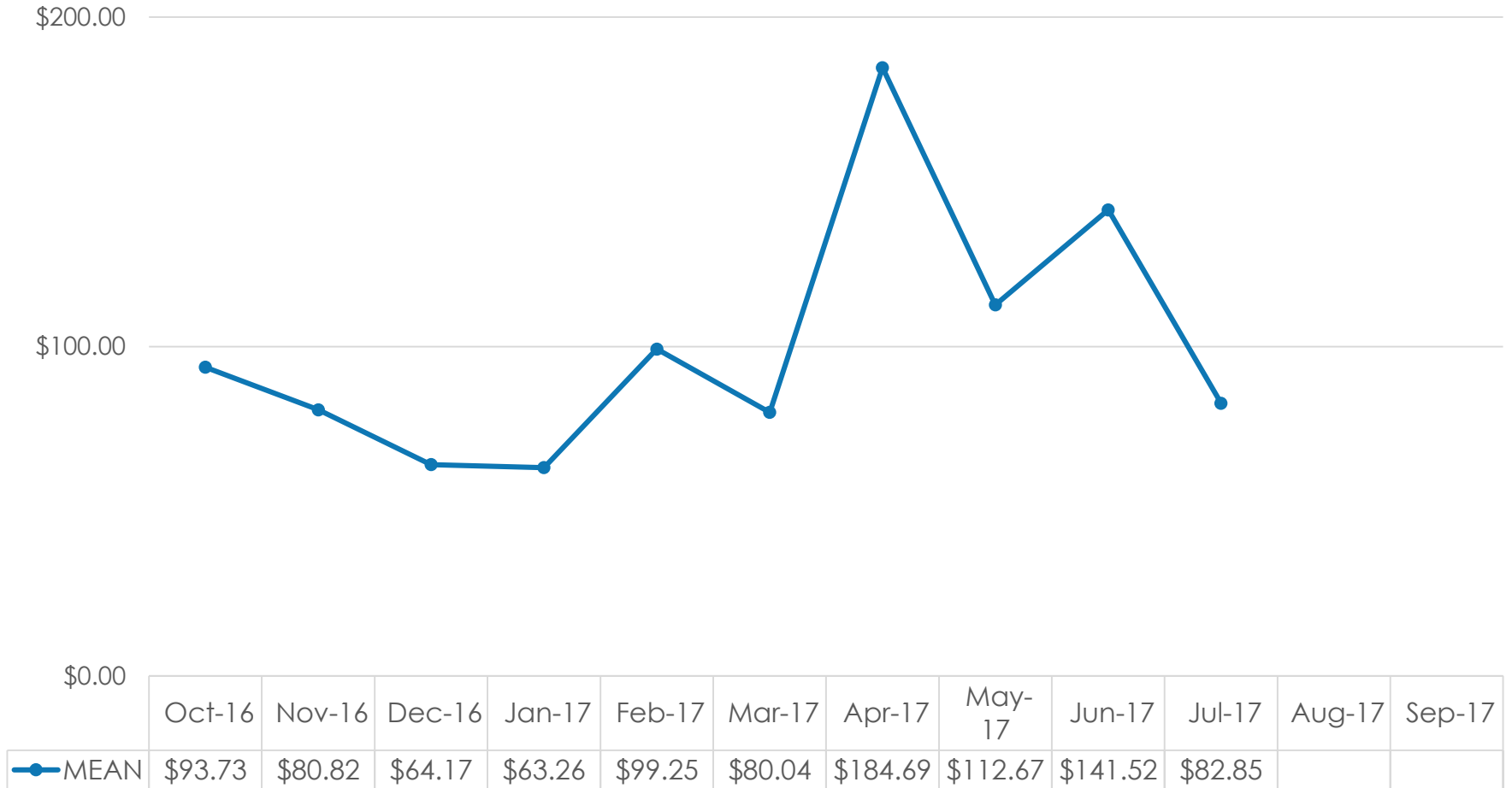
On-Island – FY2017 Tracking

Gift/ Souvenir – Self/ Companion



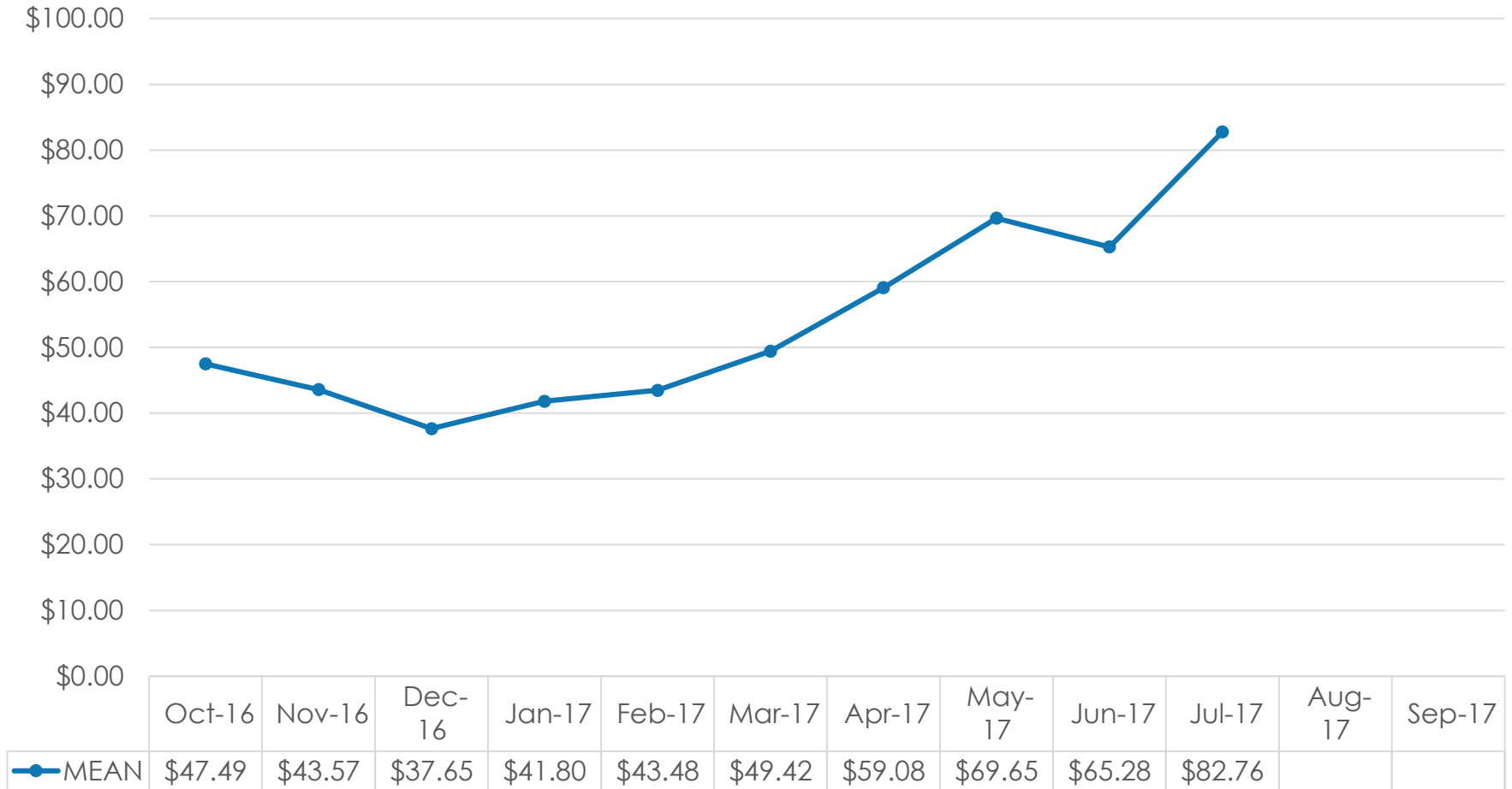
On-Island – FY2017 Tracking

Gift/ Souvenir – Friends/ Family



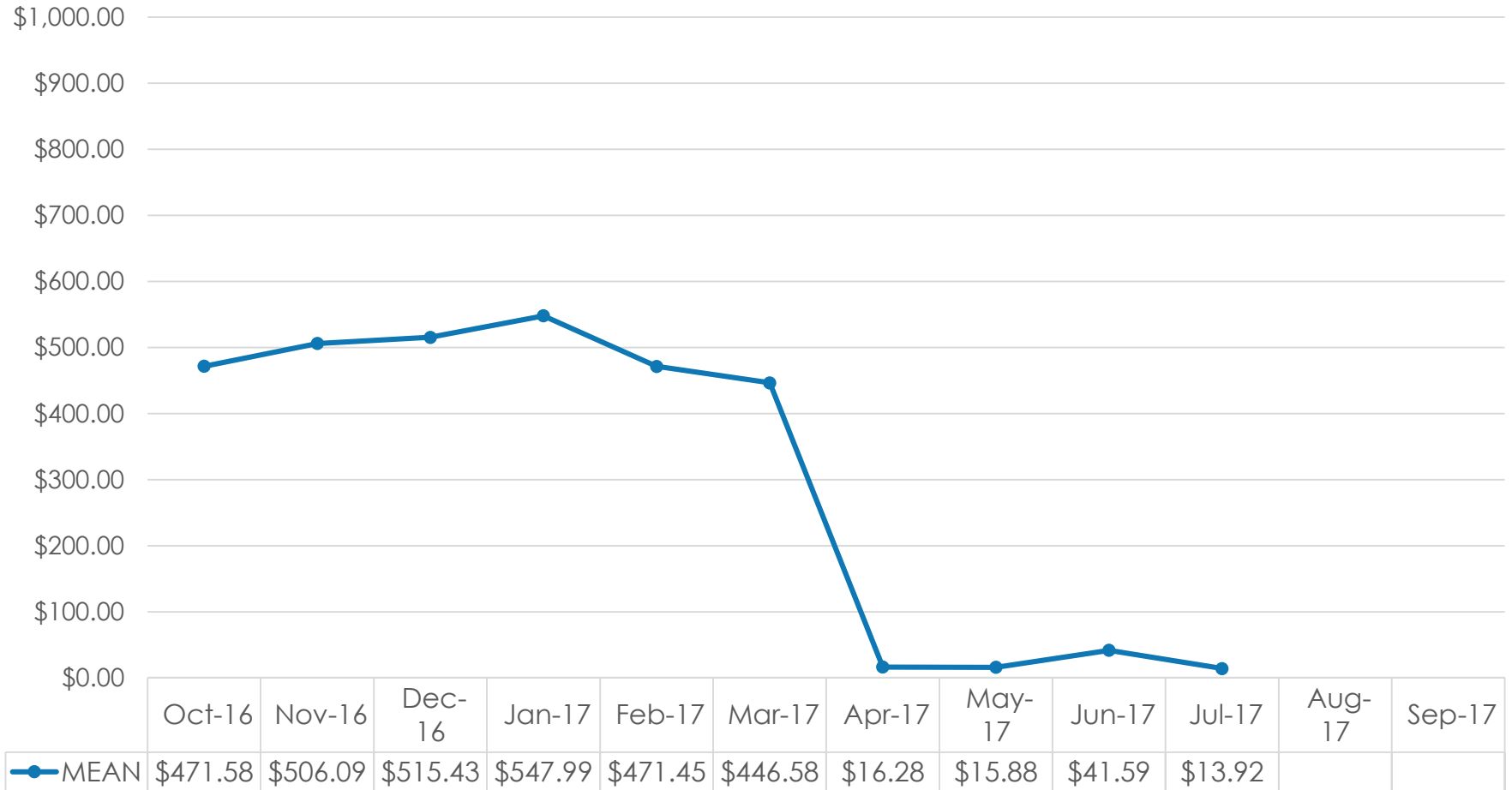
On-Island – FY2017 Tracking

Local Transportation



On-Island – FY2017 Tracking

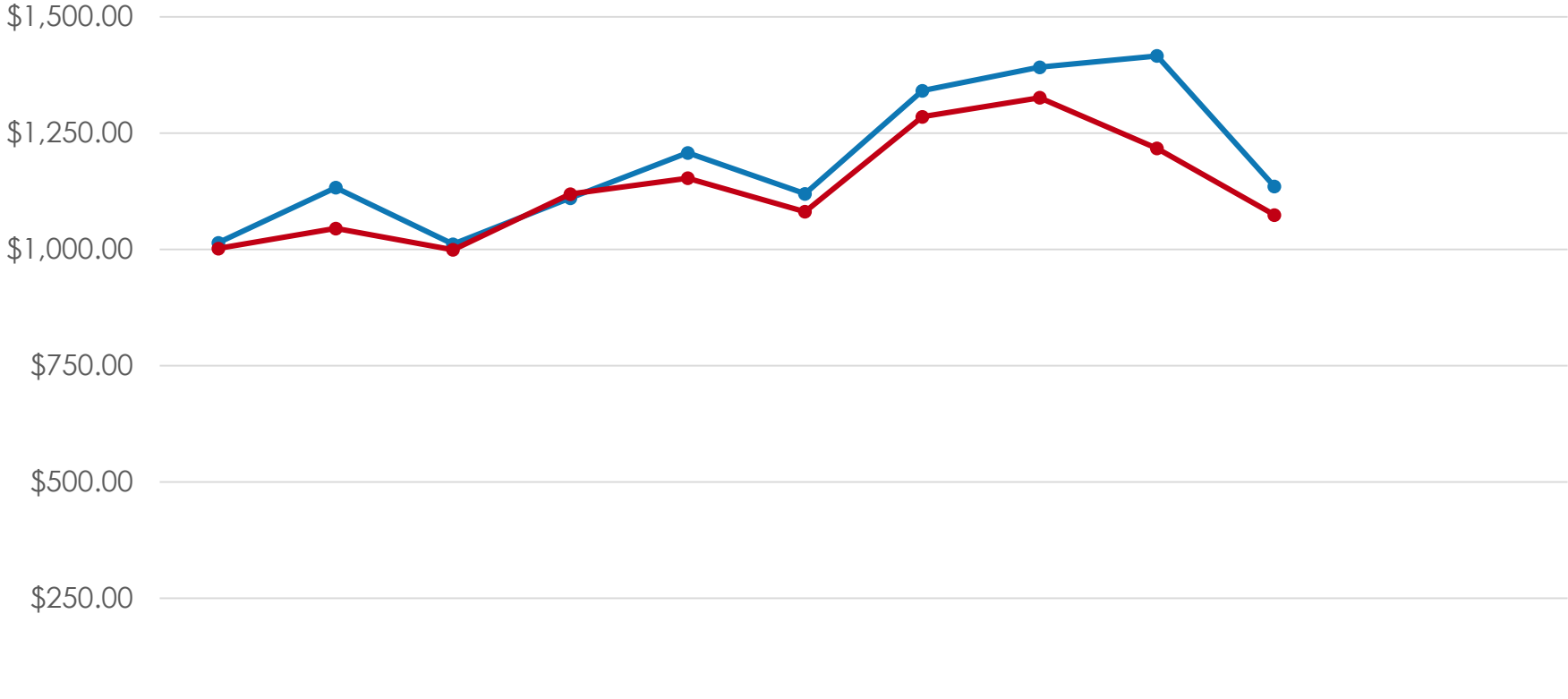
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,135.06 = 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 | \$1,119.32 | \$1,340.96 | \$1,391.46 | \$1,415.86 | \$1,135.06 | | |
| MEDIAN | \$1,002.00 | \$1,045.00 | \$999.00 | \$1,119.00 | \$1,153.00 | \$1,081.00 | \$1,285.00 | \$1,326.00 | \$1,217.00 | \$1,074.00 | | |

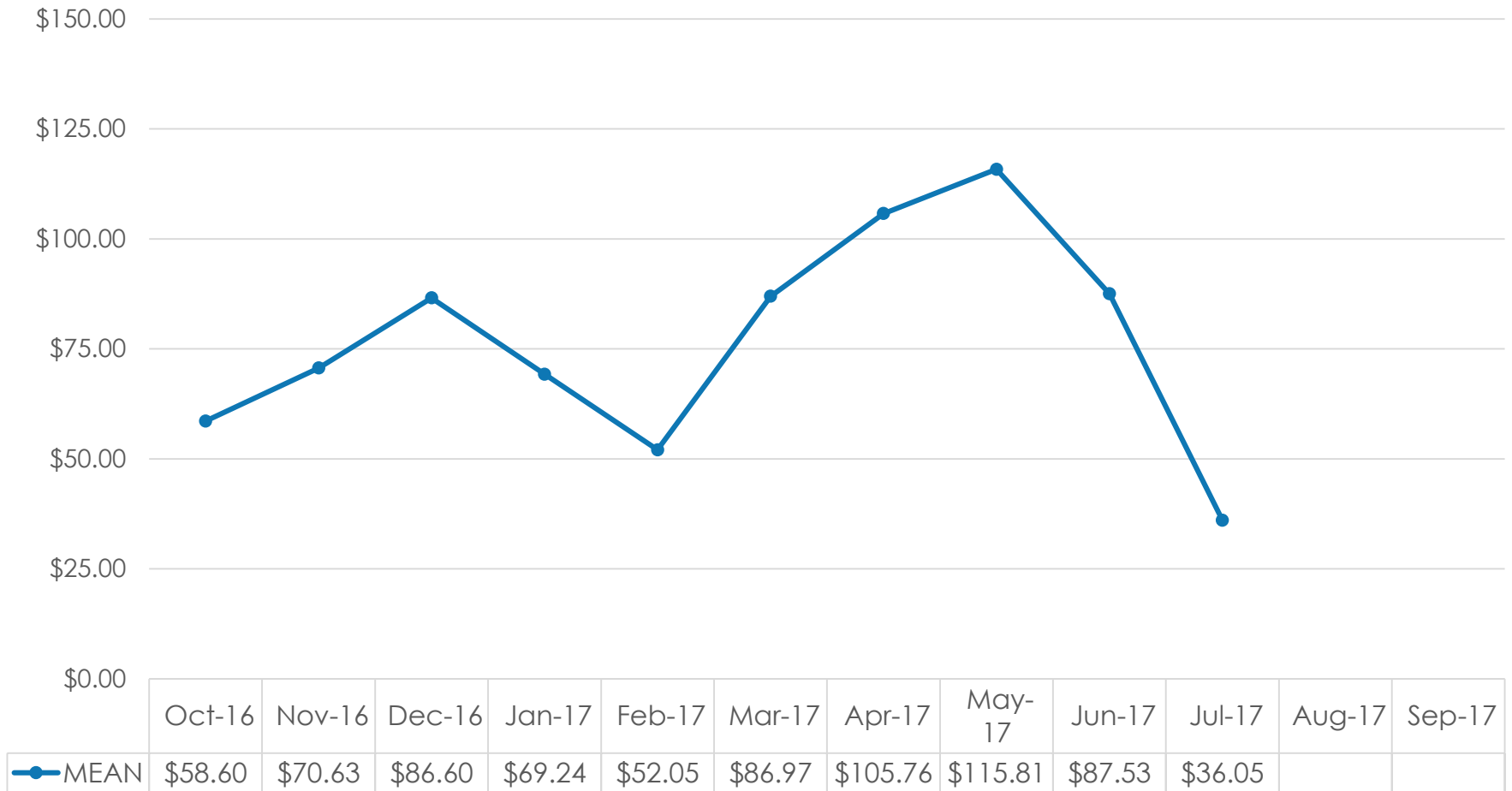
TOTAL Per Person Expenditures – Key Segments

GVB EXIT SURVEY
TOTAL - PER PERSON

| | | TOTAL | MICE | HONEYMOON | WEDDING | LEISURE | GROUP TOUR | REPEAT VISITOR | FAMILY | FIT |
|----------|--------|------------|------------|------------|------------|------------|------------|----------------|------------|------------|
| | | - | - | - | - | - | - | - | - | - |
| TOTAL PP | Mean | \$1,135.06 | \$1,068.09 | \$2,048.77 | \$1,058.36 | \$1,212.79 | \$1,054.61 | \$1,103.35 | \$1,136.31 | \$1,077.61 |
| | Median | \$1,074 | \$963 | \$2,007 | \$1,036 | \$1,119 | \$1,133 | \$1,064 | \$1,073 | \$1,012 |

Prepared by Anthology Research

GUAM AIRPORT EXPENDITURE – FY2017 Tracking

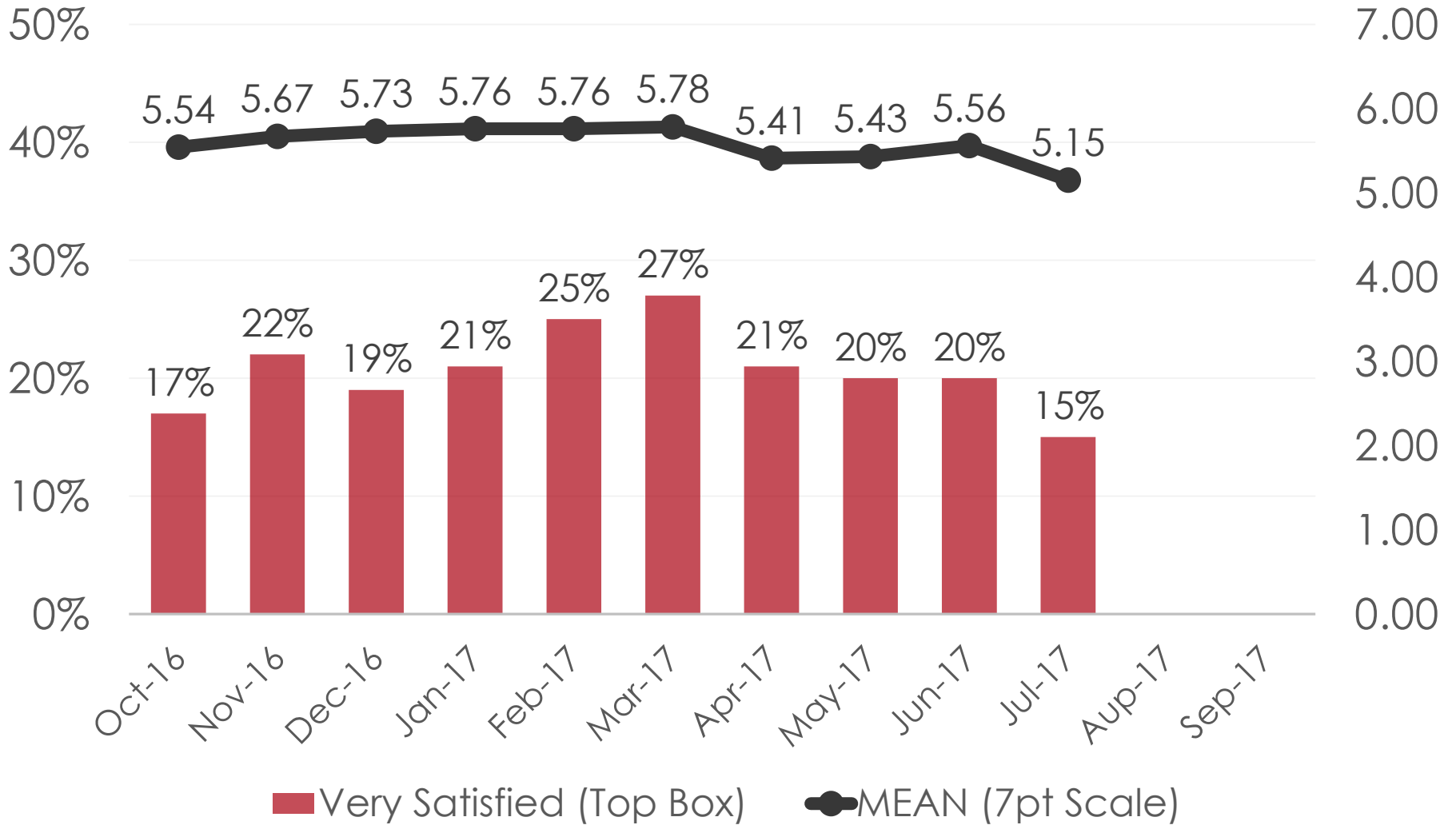


SECTION 4

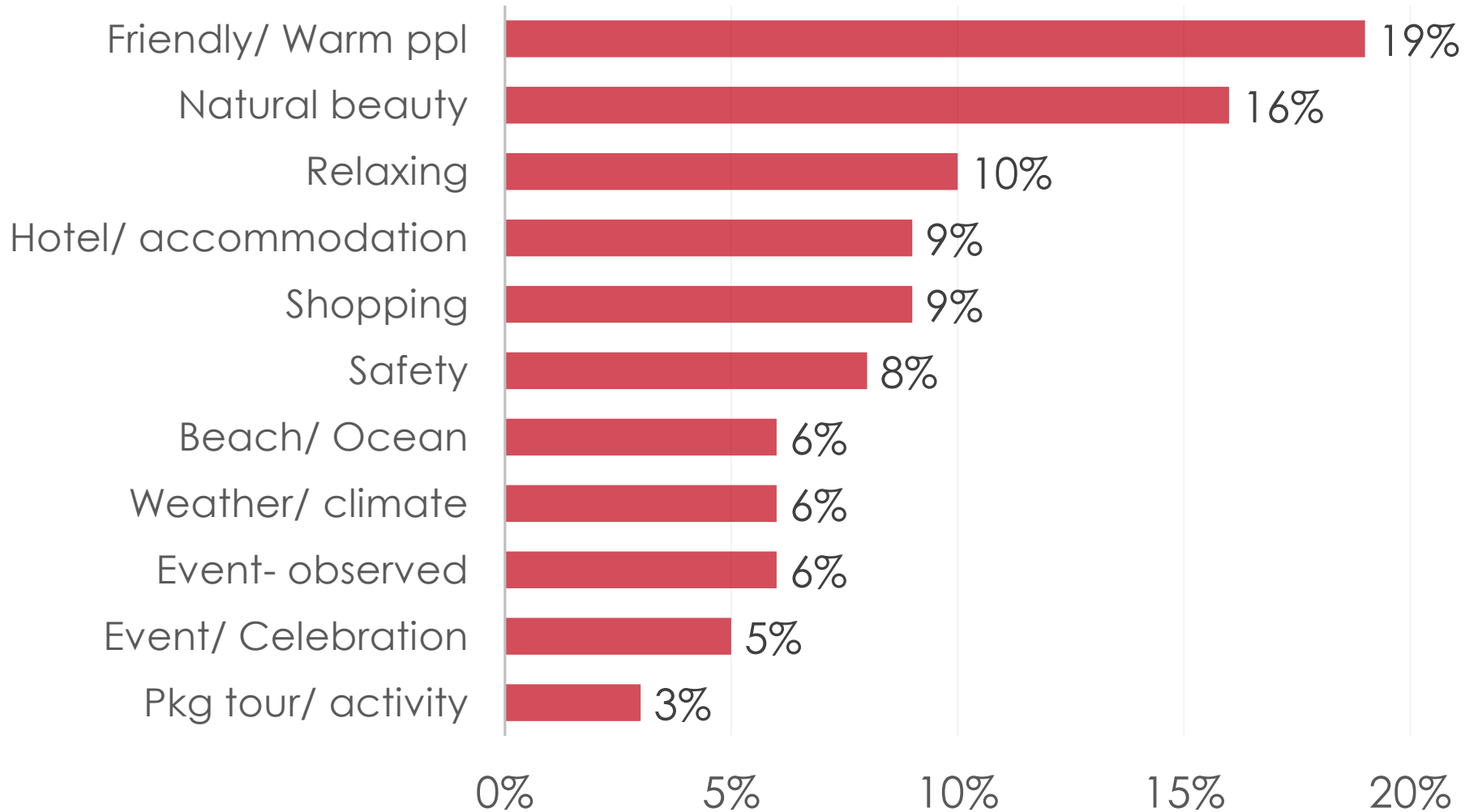
VISITOR SATISFACTION

BEHAVIOR

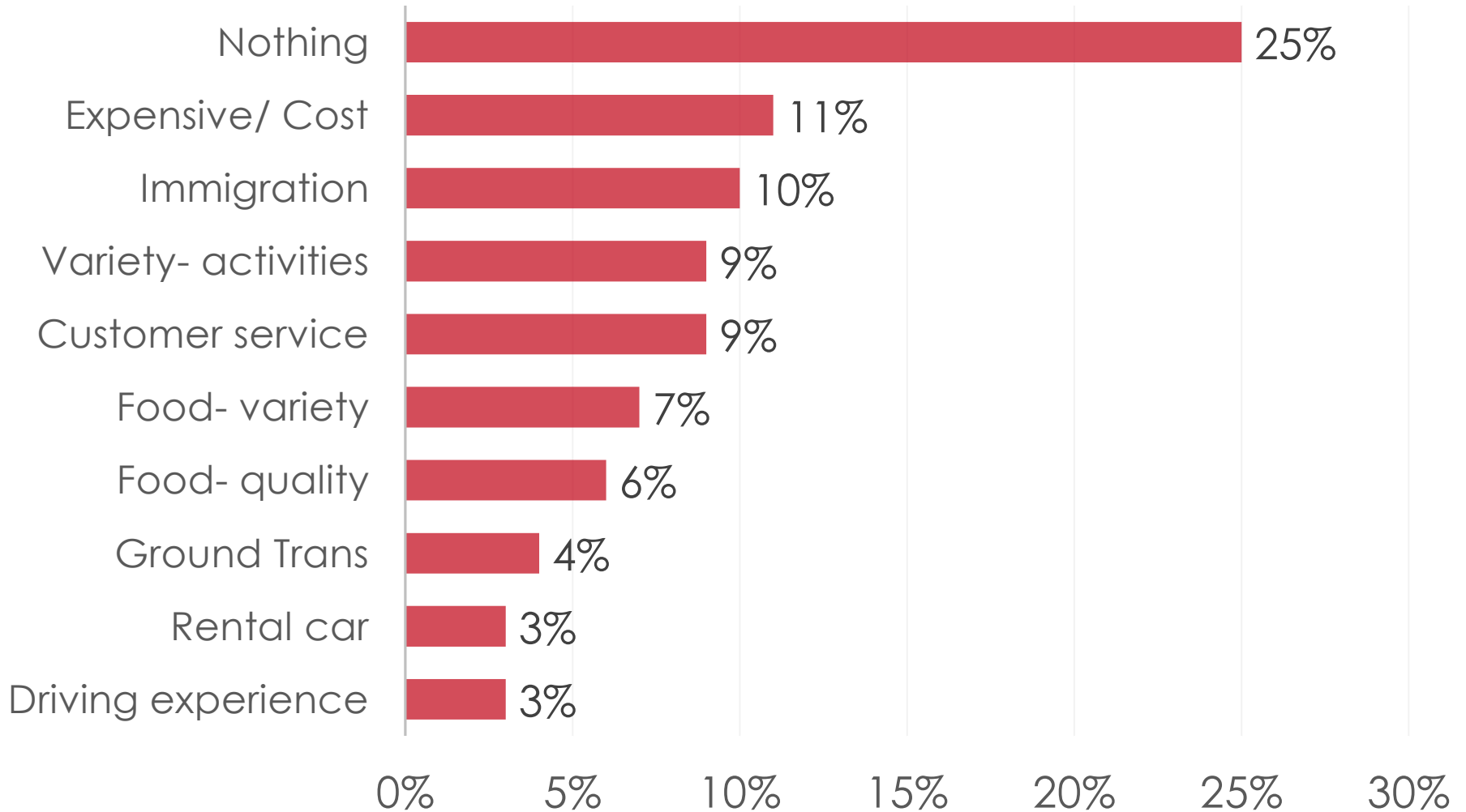
OVERALL SATISFACTION



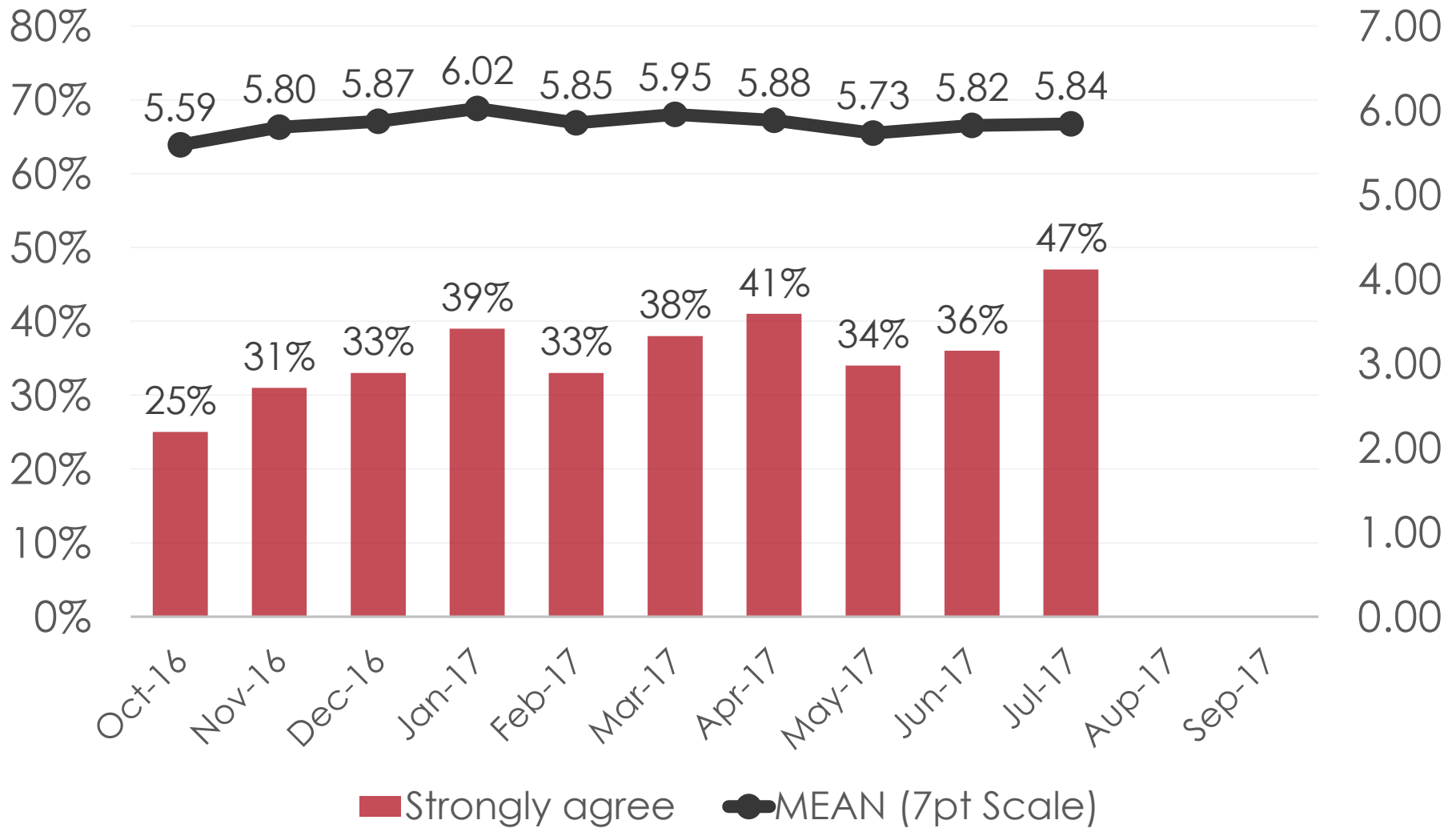
Positive aspects of trip (Top Reason)



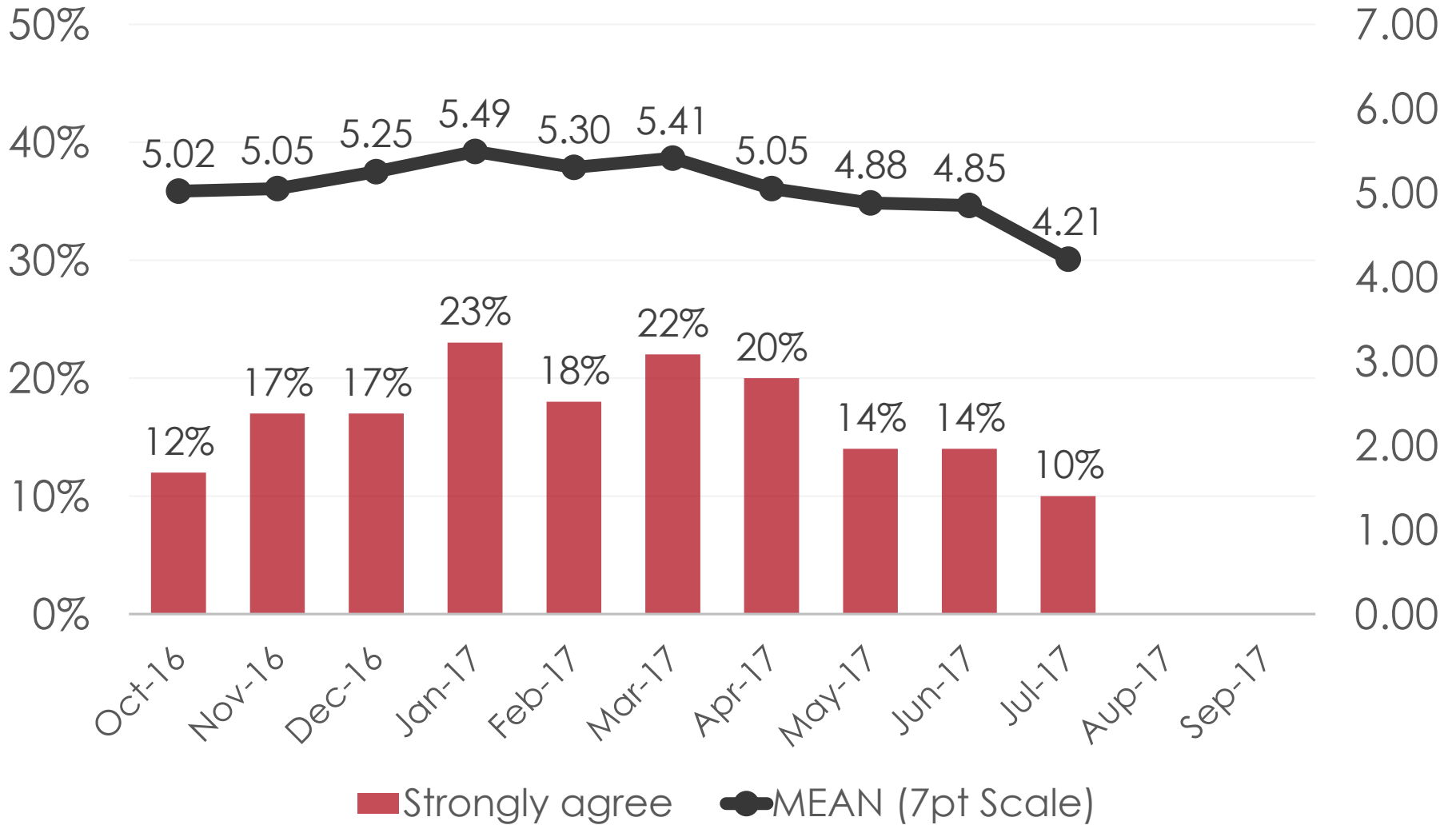
Negative aspects of trip (Top Reason)



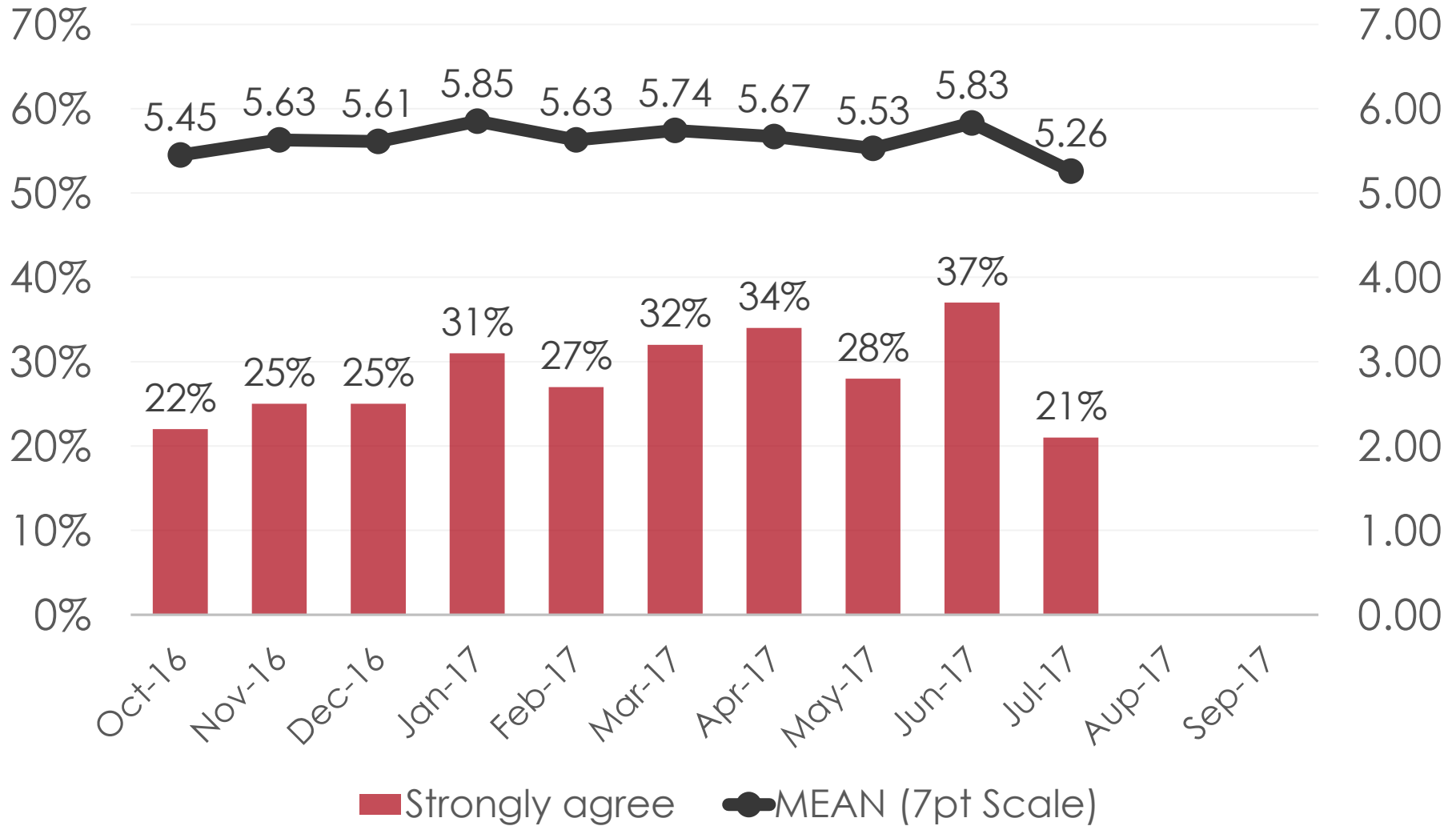
Guam was better than expected



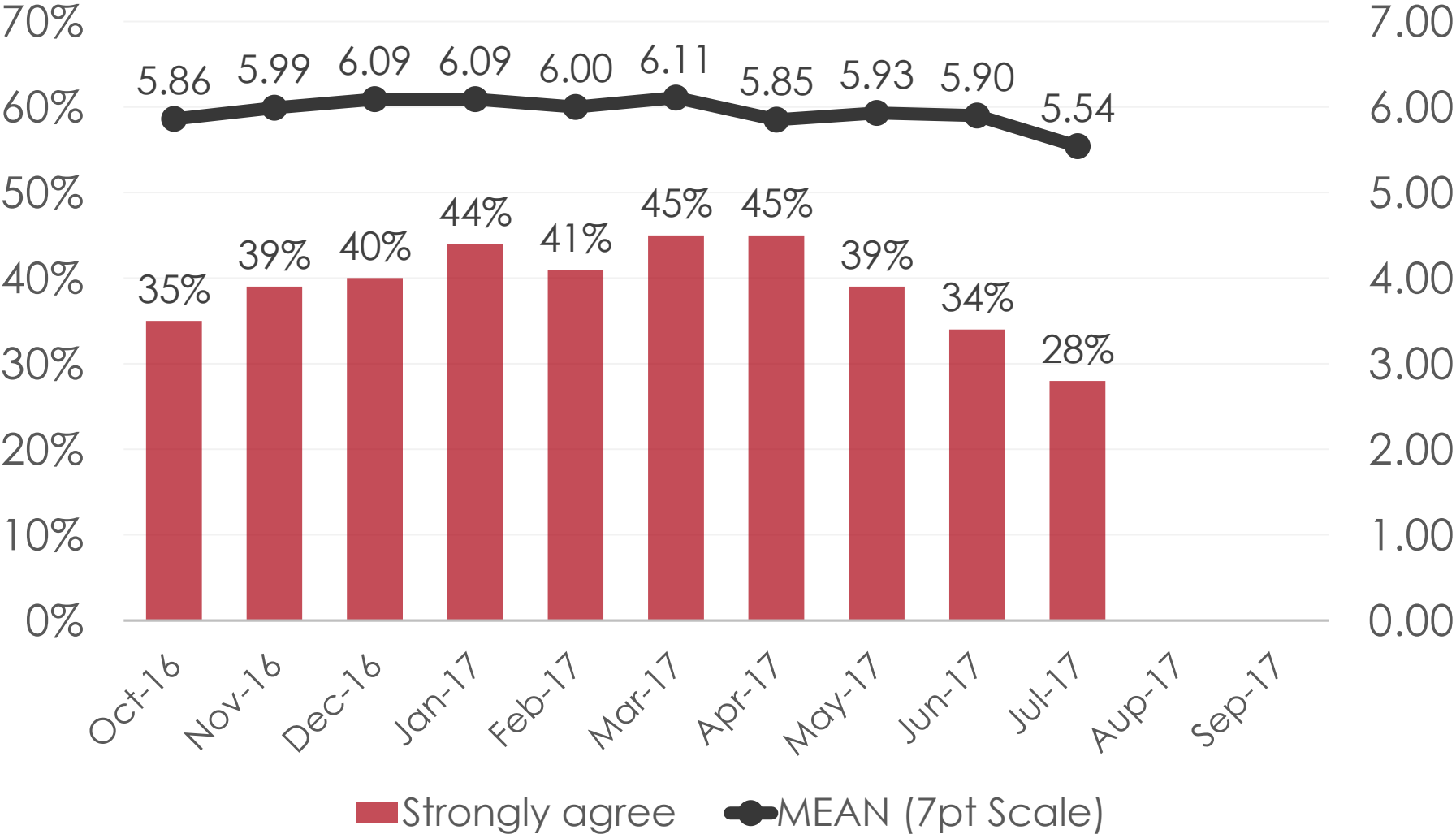
I had no communication problems



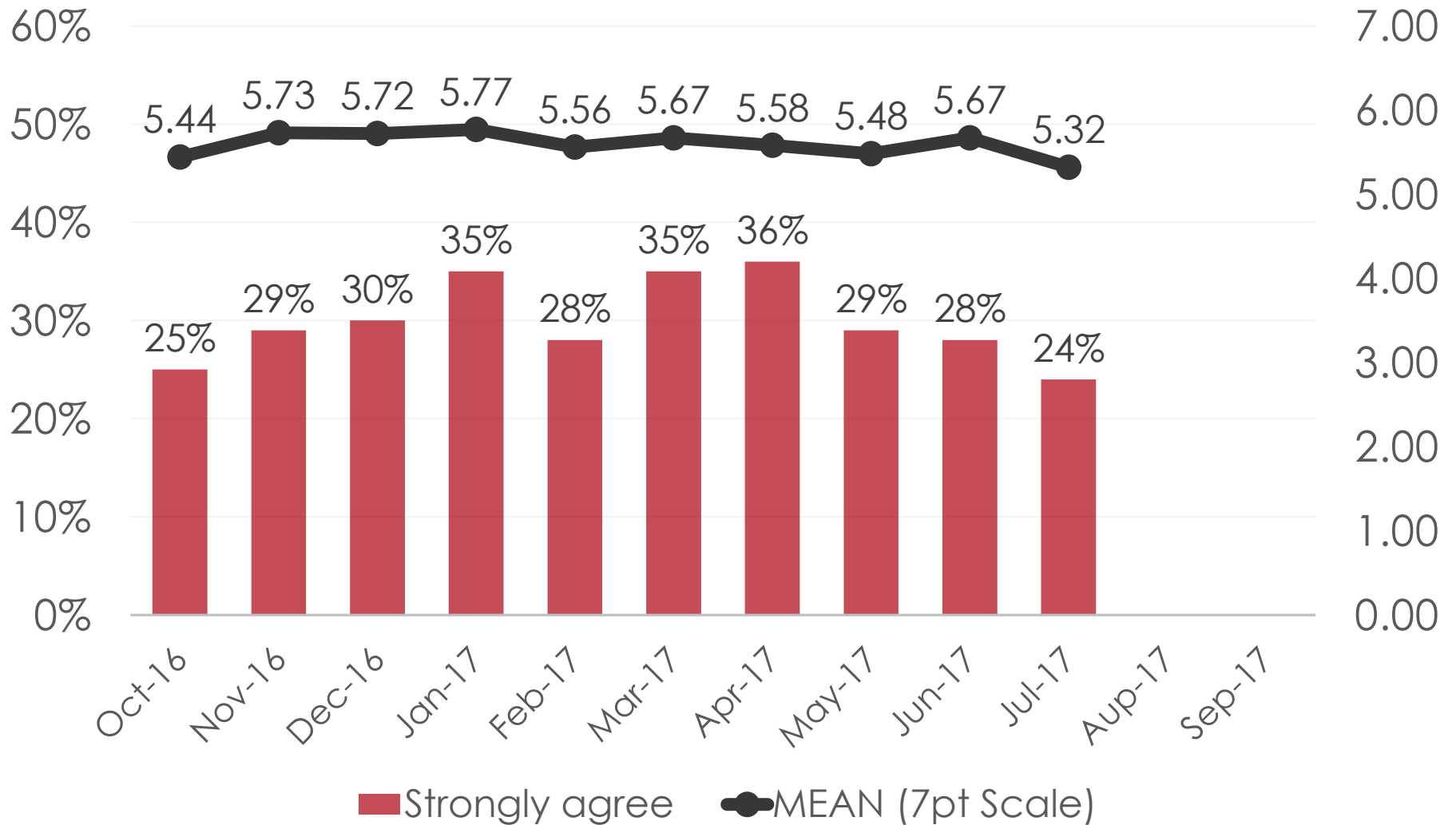
I will recommend Guam to friends



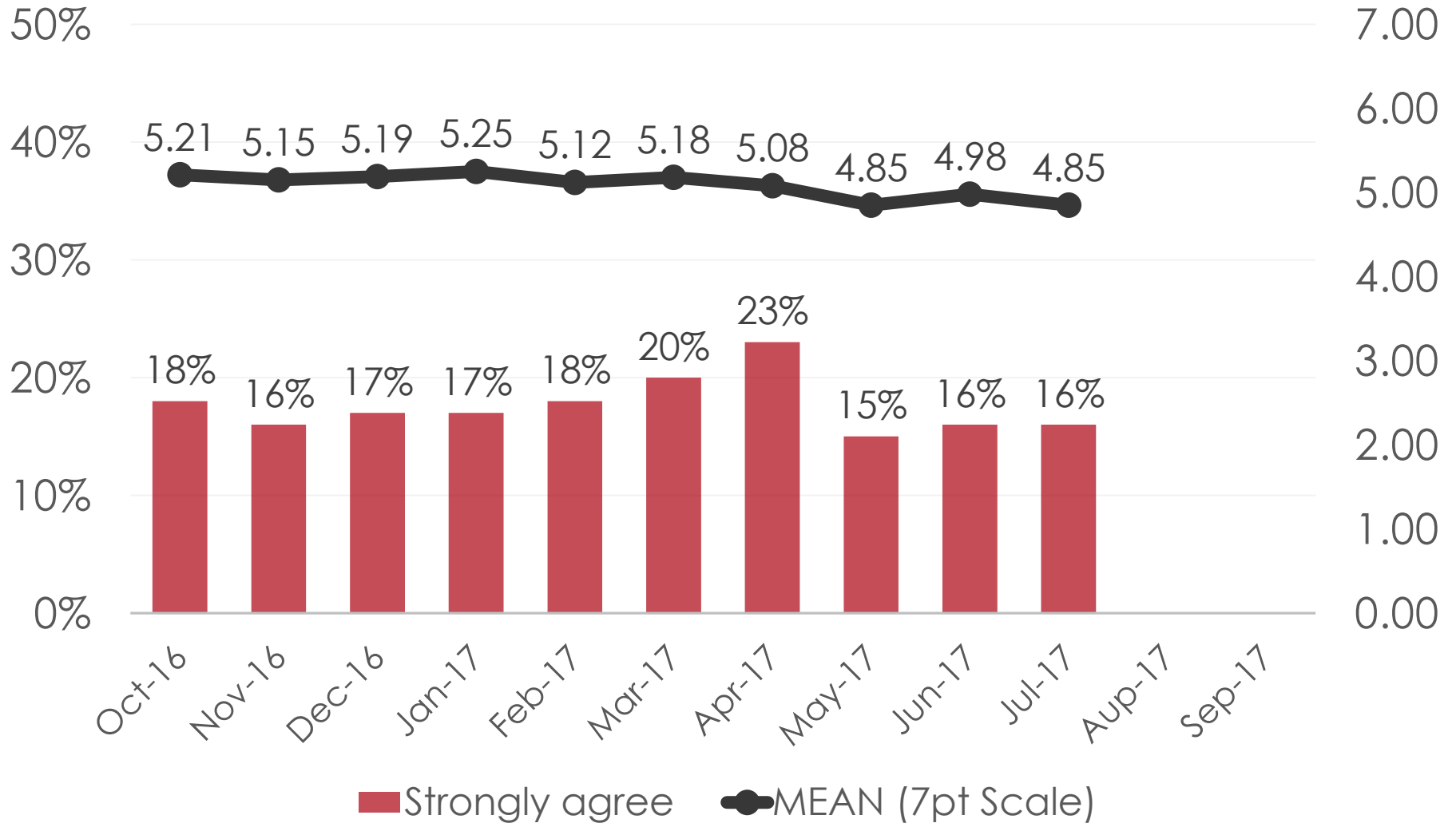
Sites on Guam were attractive



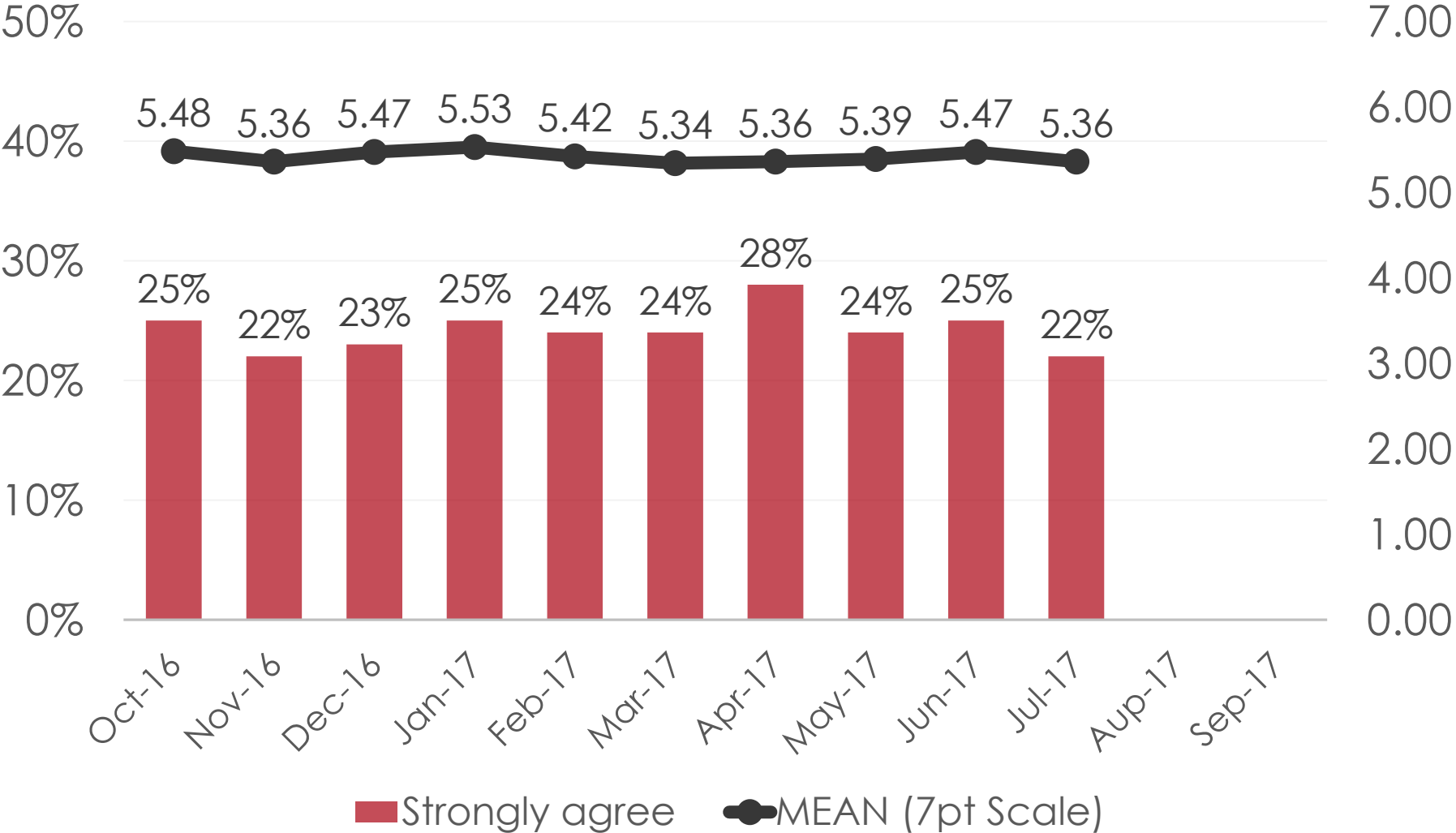
I plan to visit Guam again



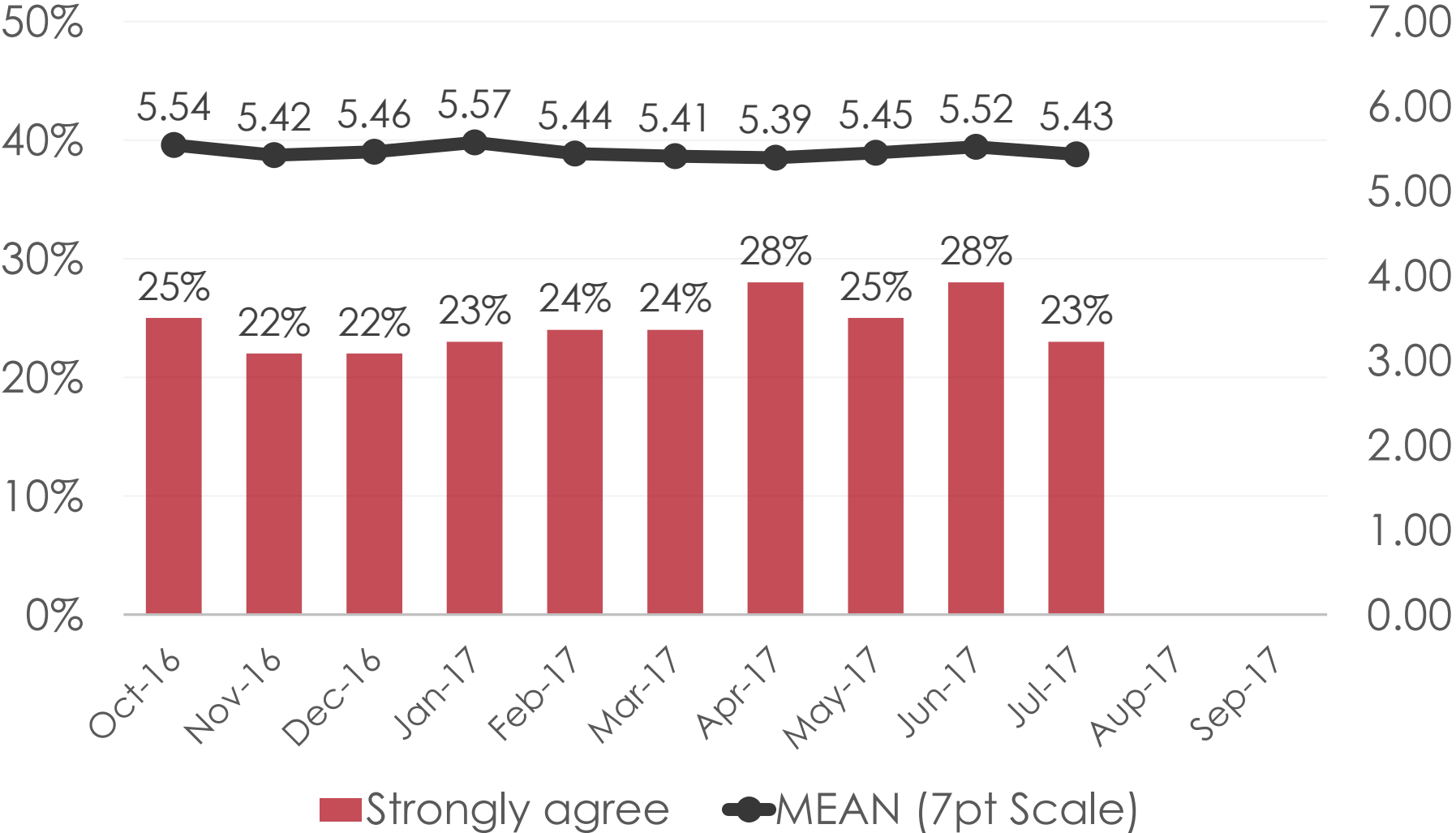
Not enough night time activities



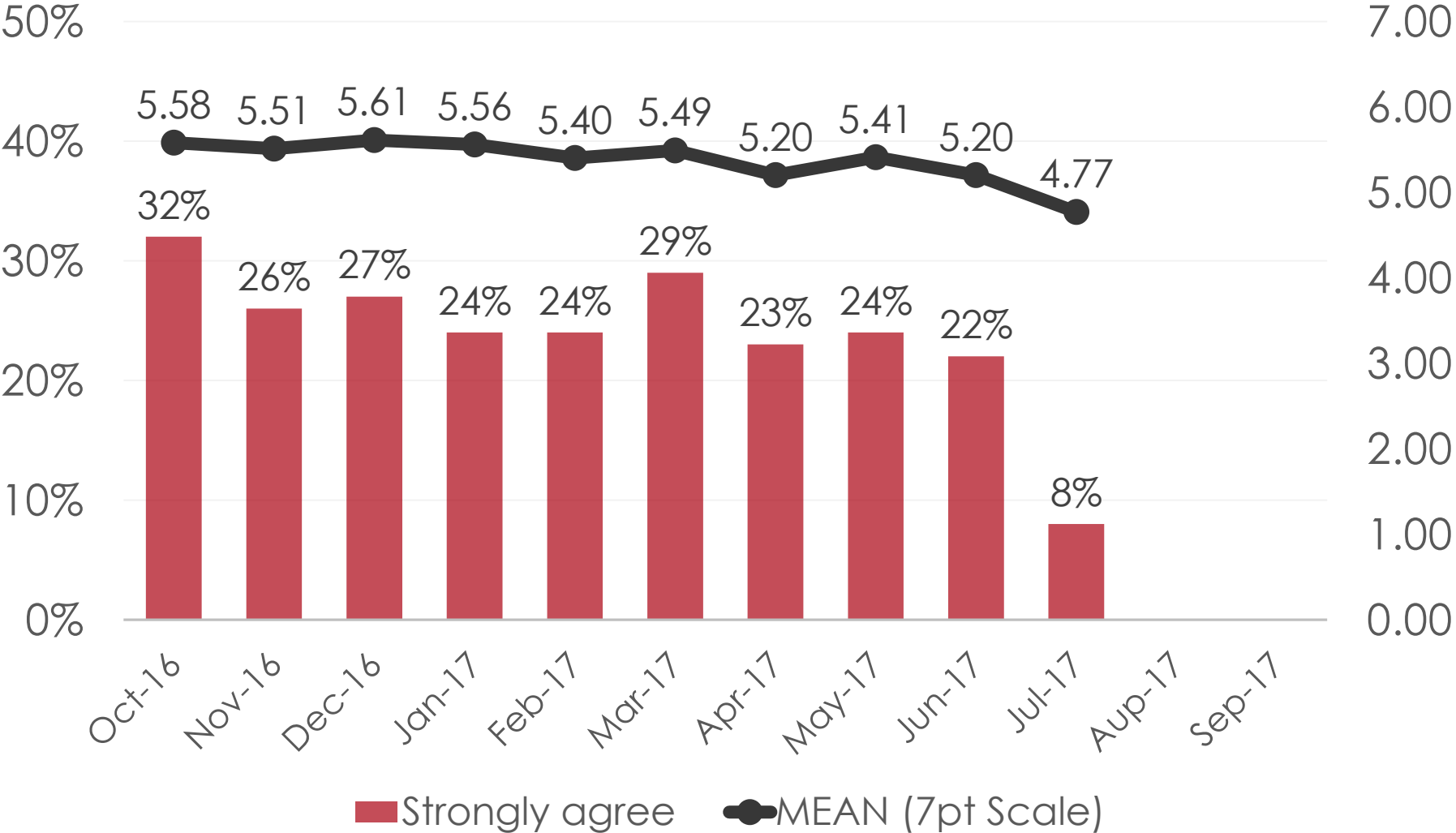
Tour guides were professional



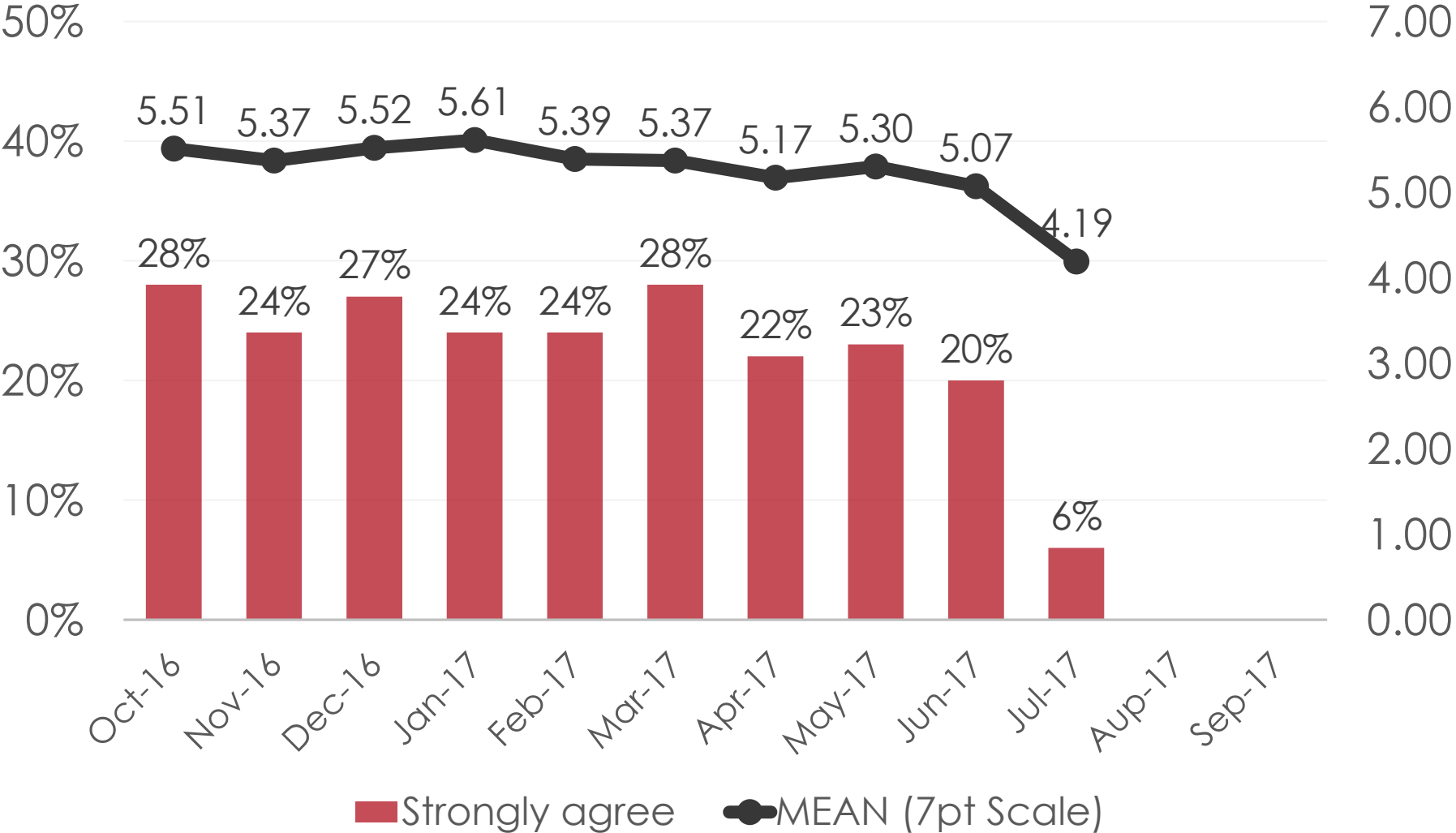
Tour drivers were professional



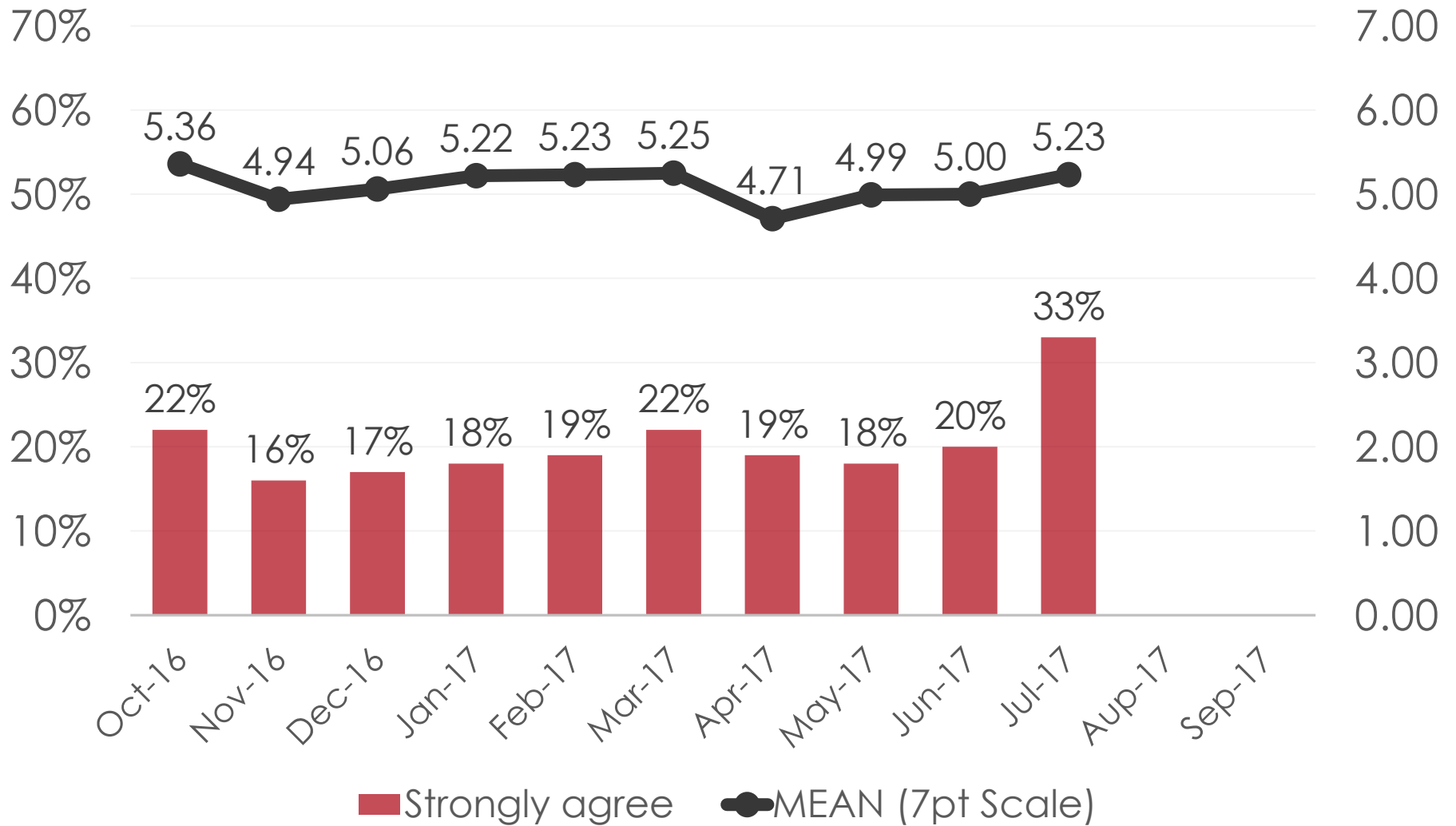
Taxi drivers were professional



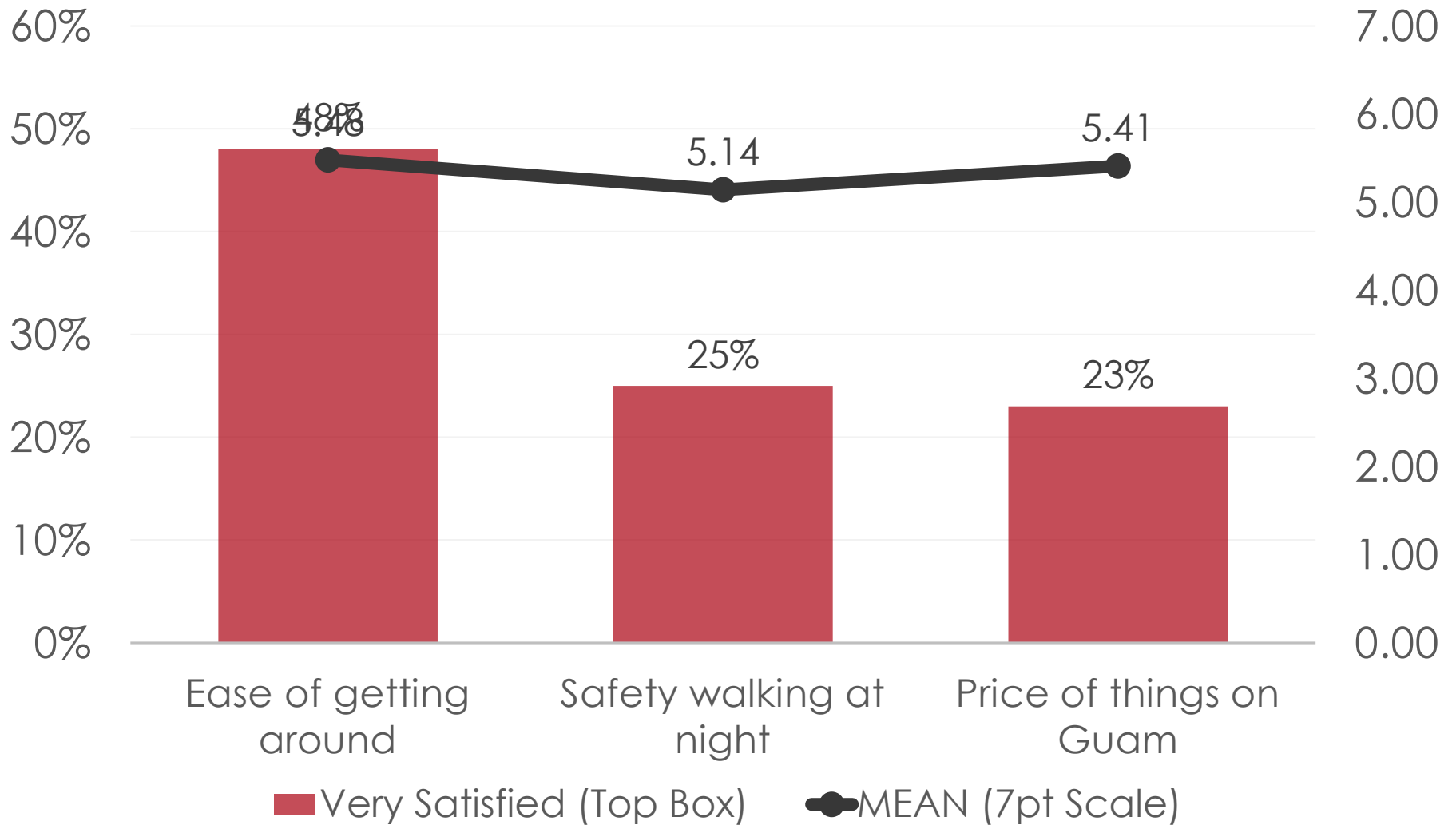
Taxis were clean



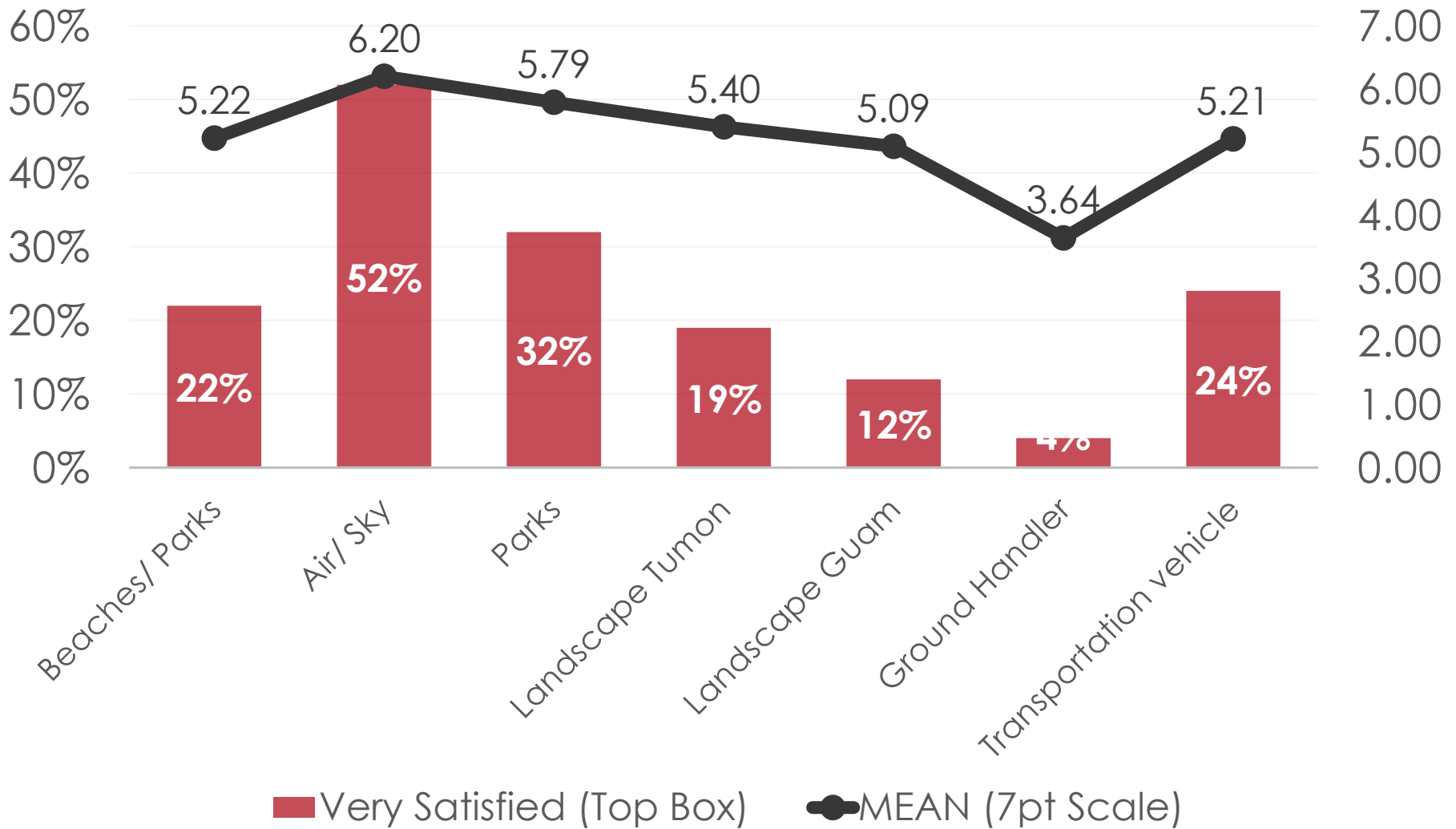
Guam airport was clean



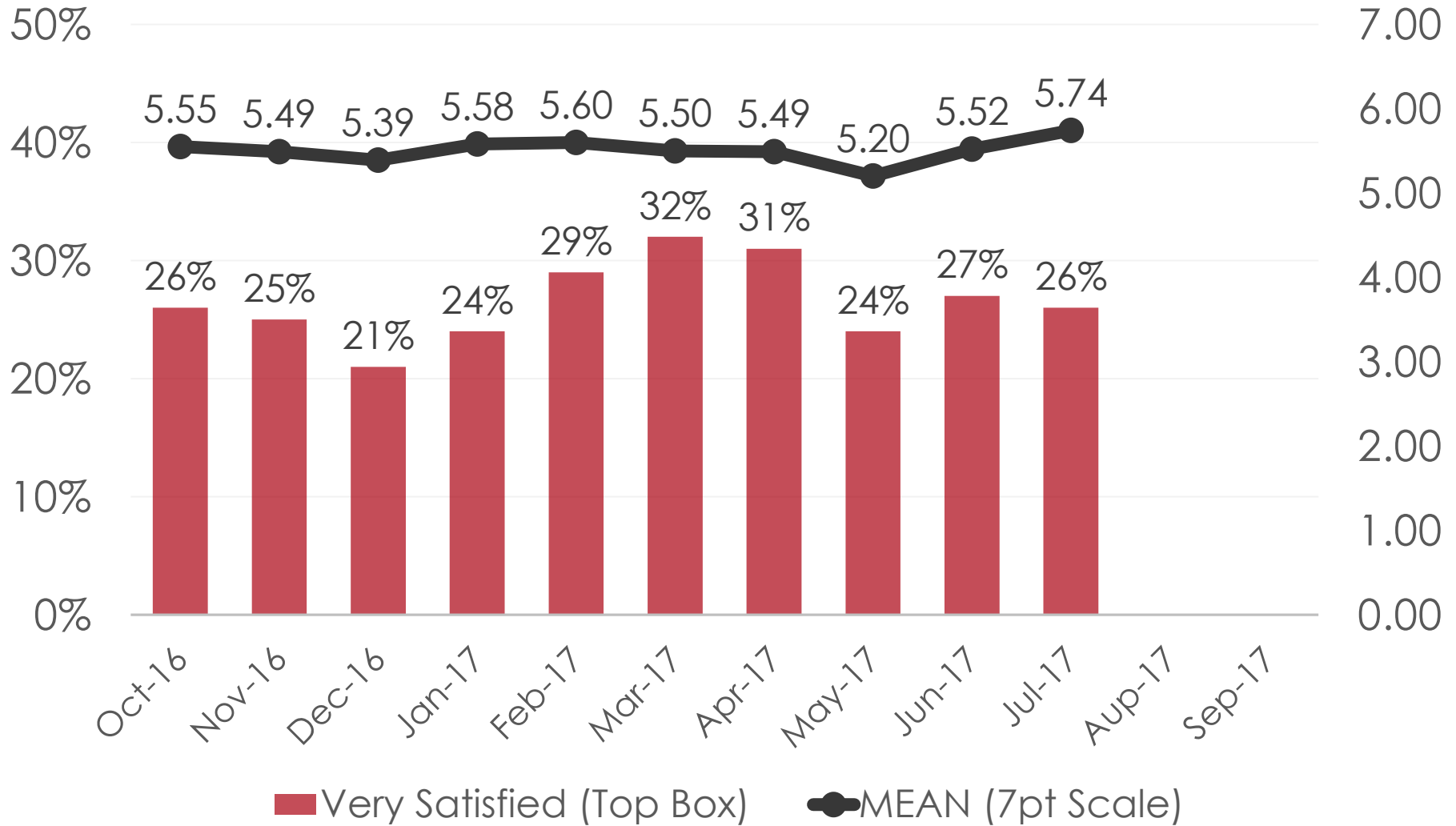
GENERAL SATISFACTION



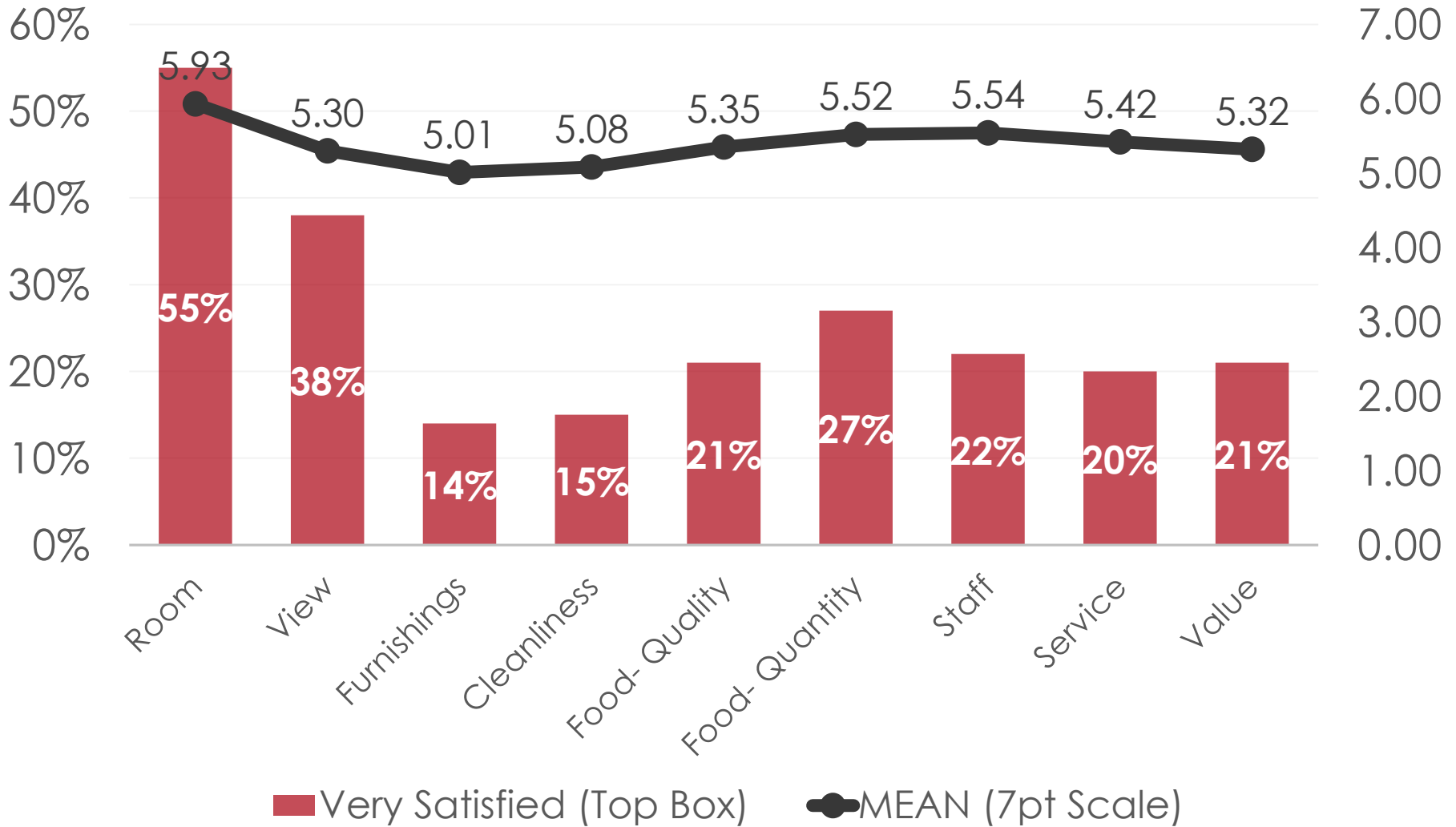
GENERAL SATISFACTION – Quality/ Cleanliness



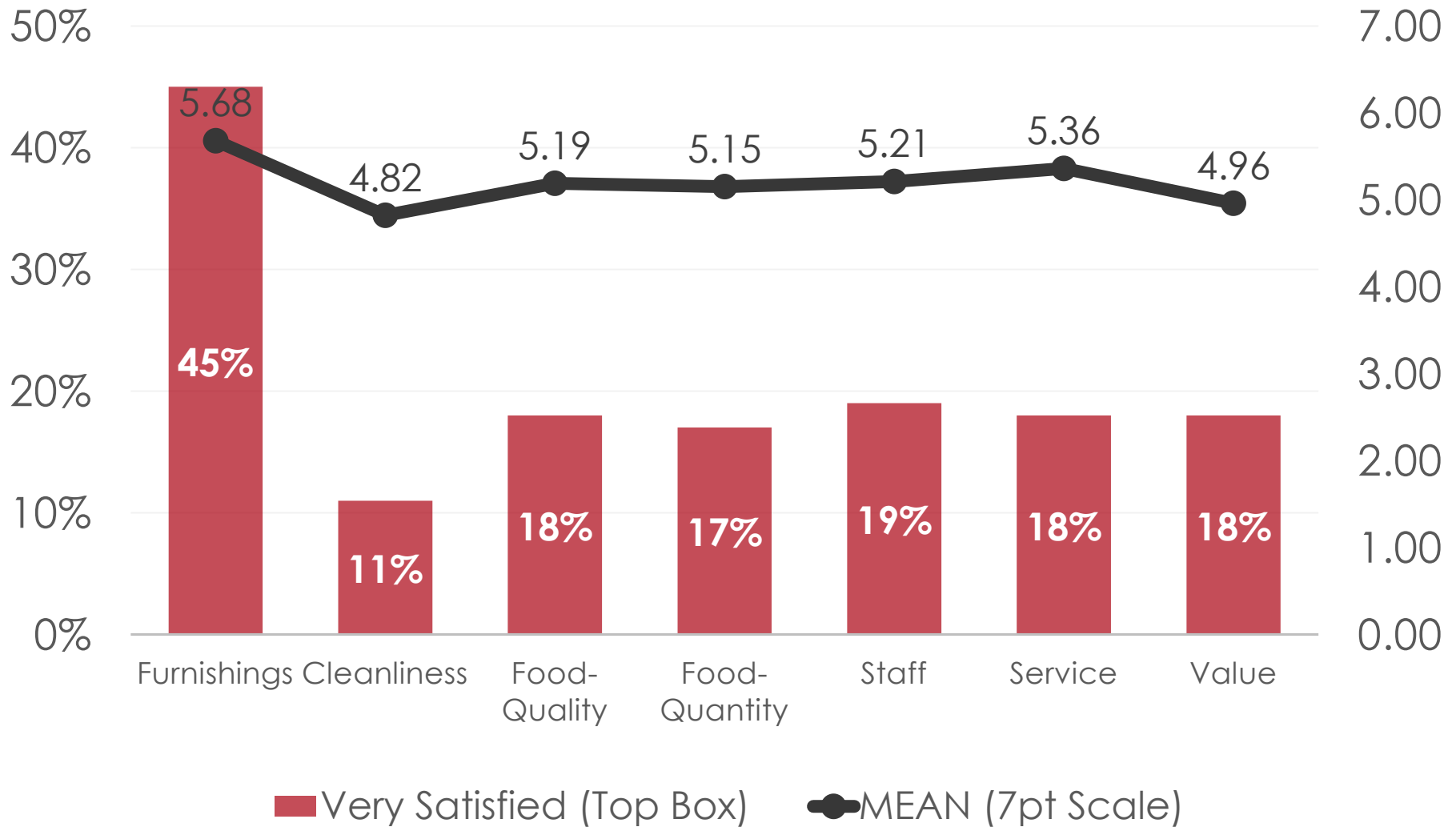
ACCOMMODATIONS – OVERALL SATISFACTION



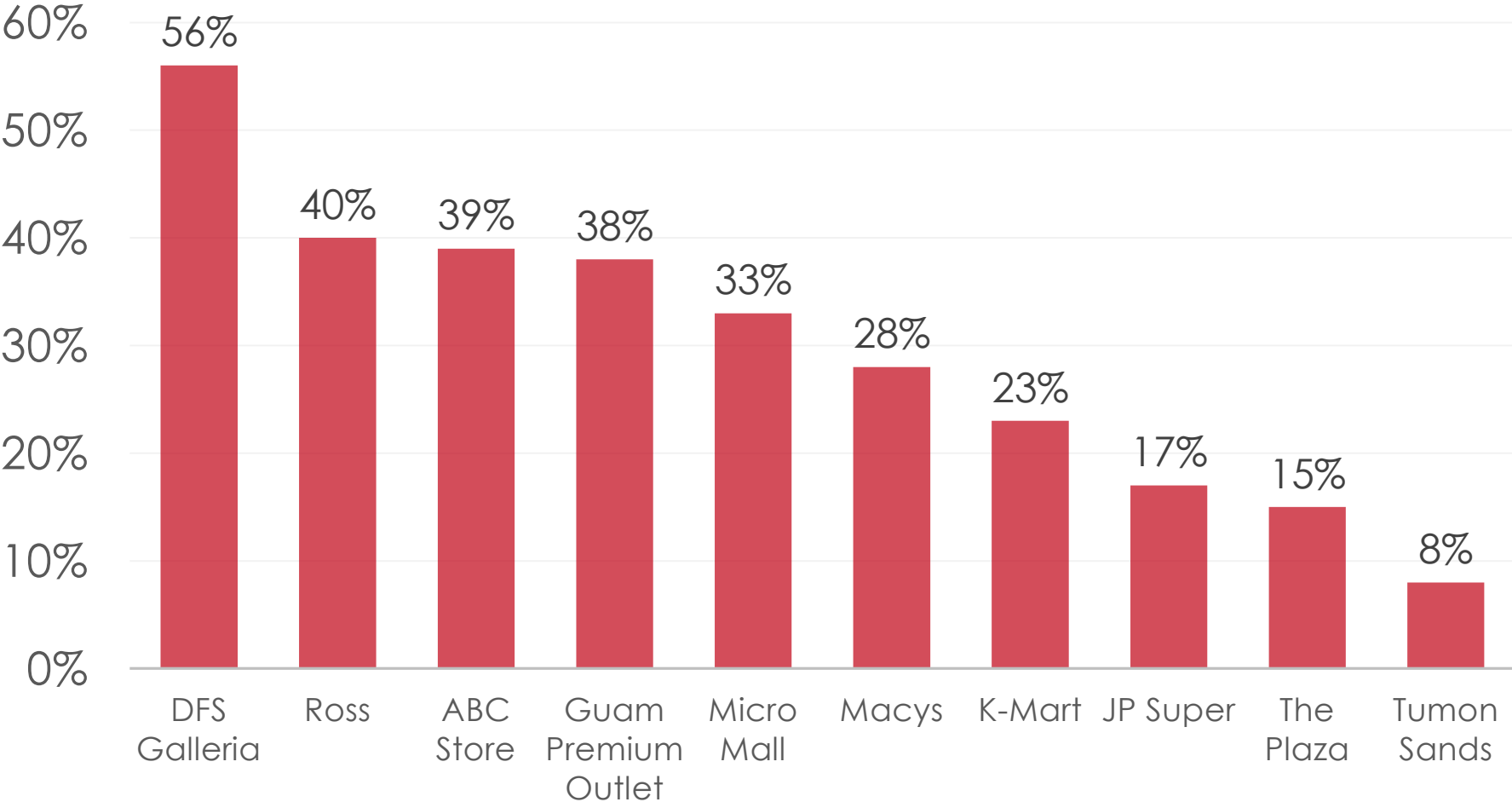
ACCOMMODATIONS – Satisfaction by Category



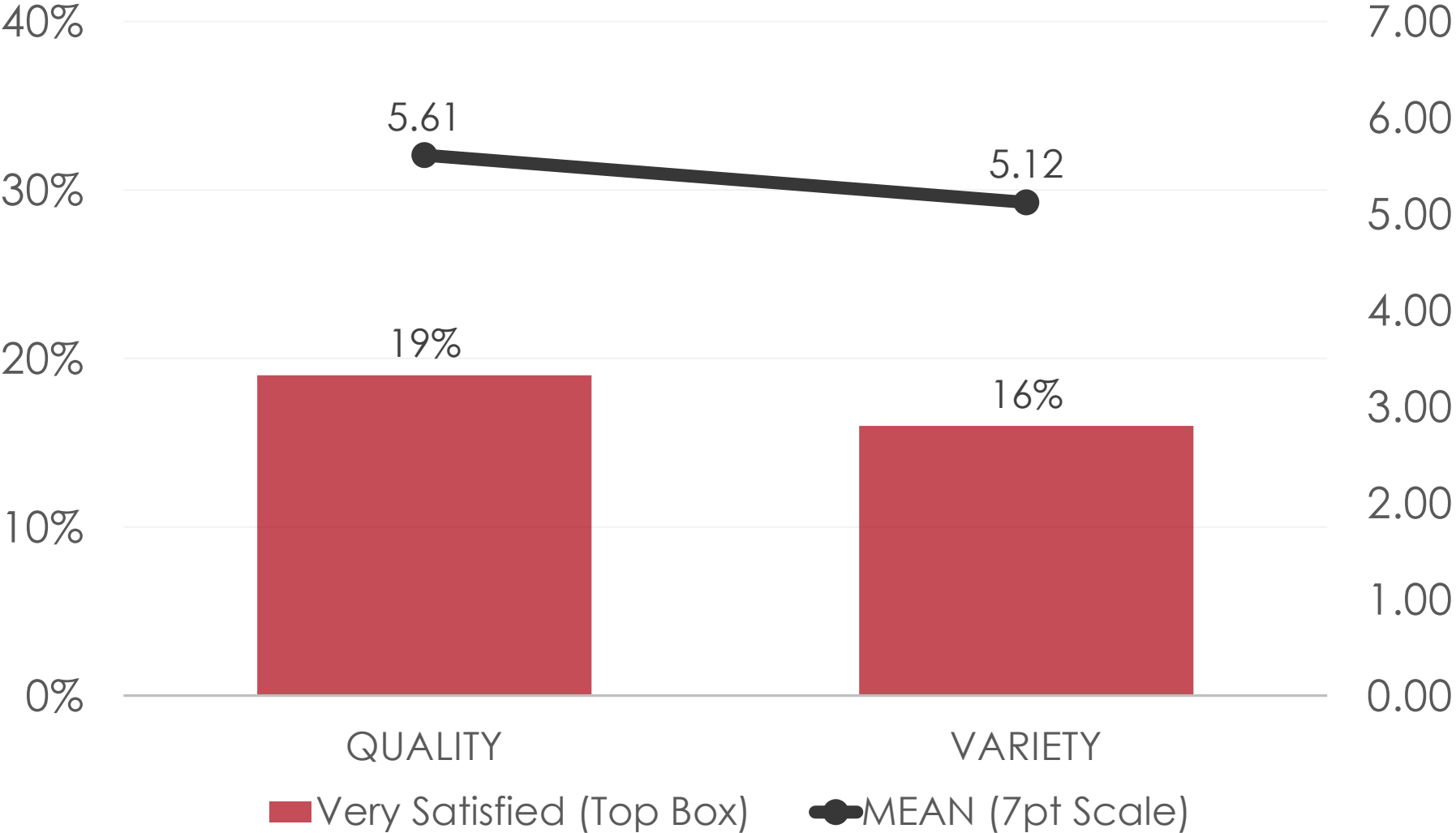
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



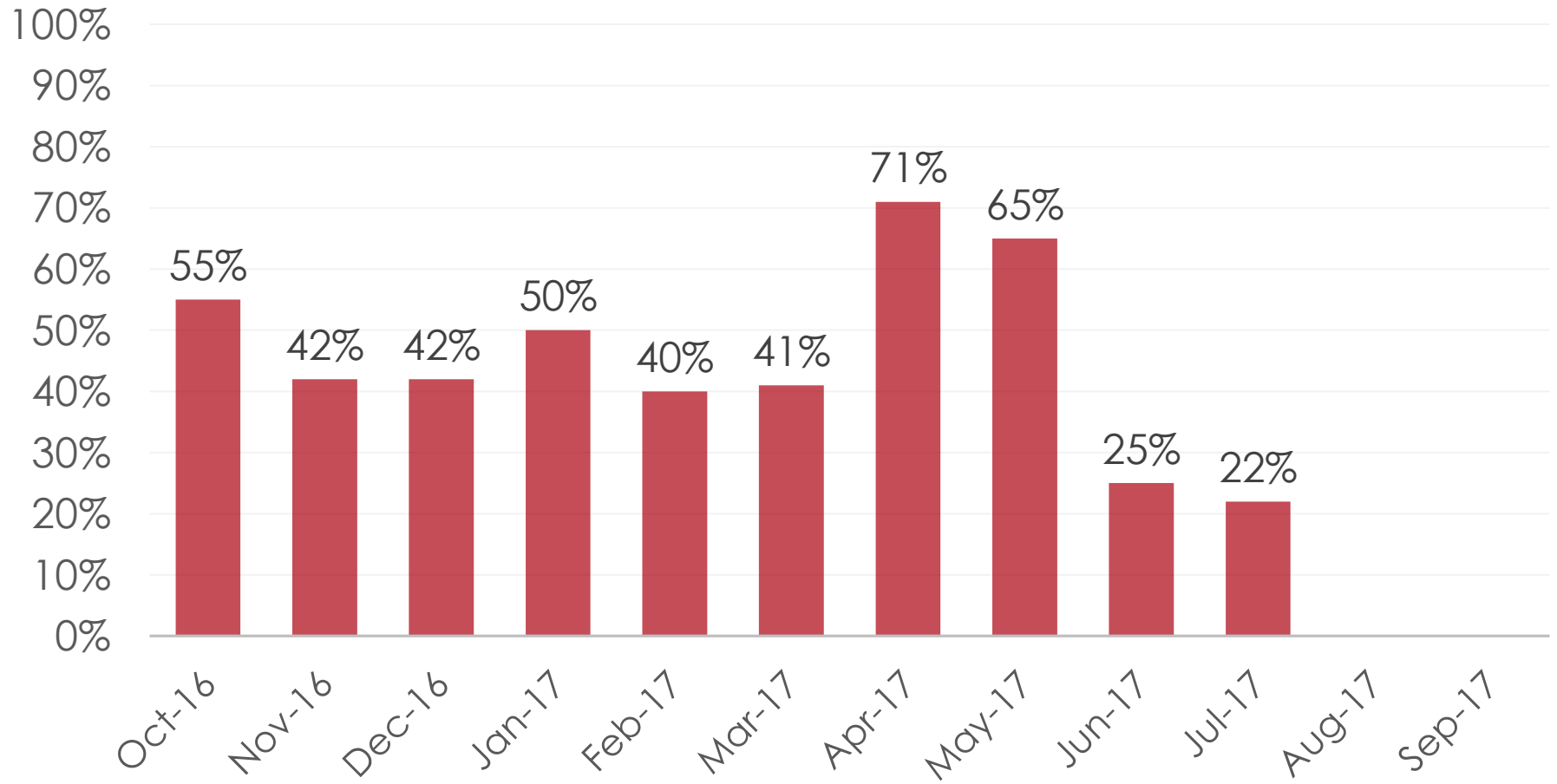
Shopping Malls/ Stores (Top Responses)



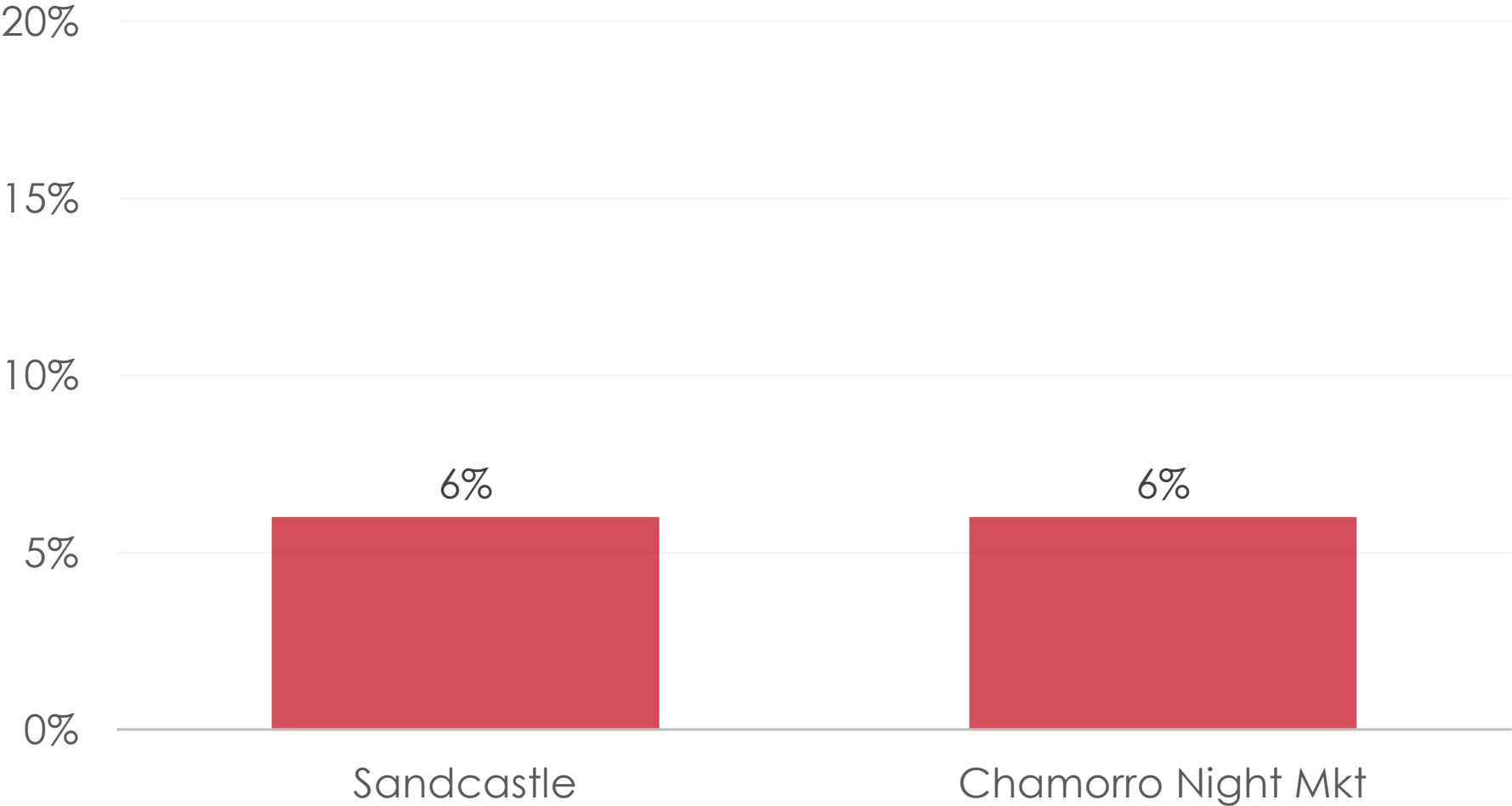
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

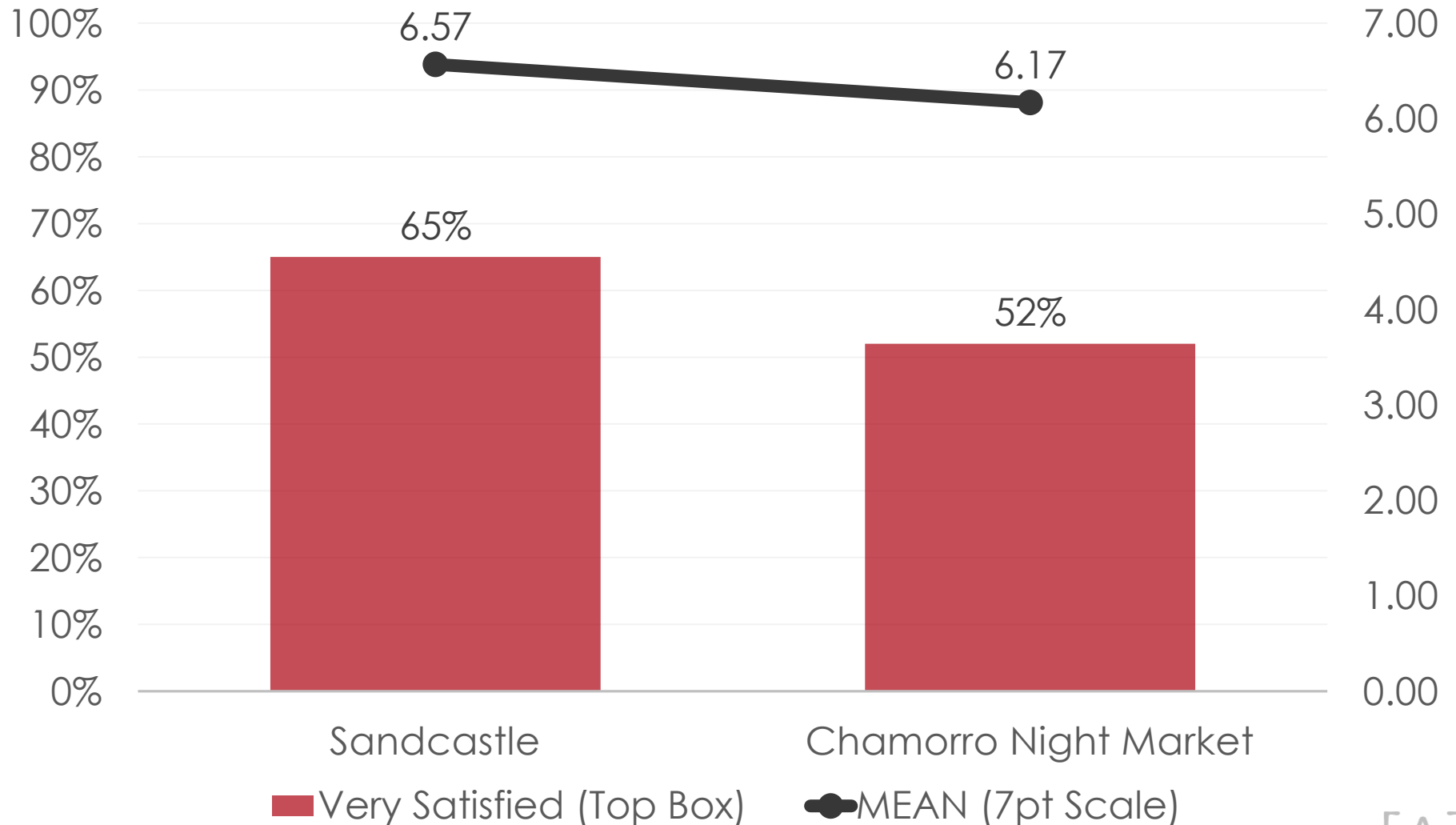


Optional Tour Participation (Top Responses 5%+)

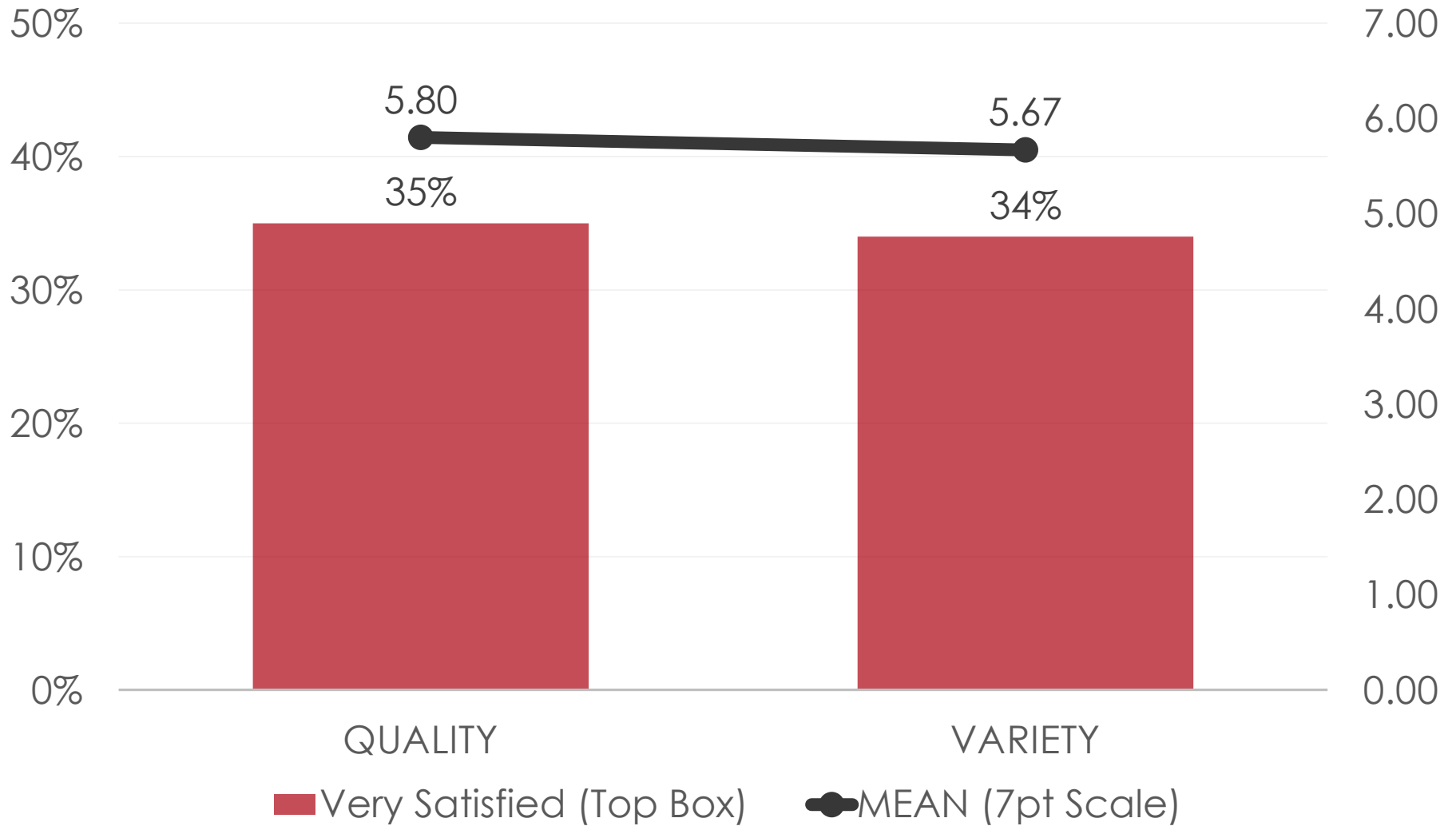


Optional Tour Satisfaction

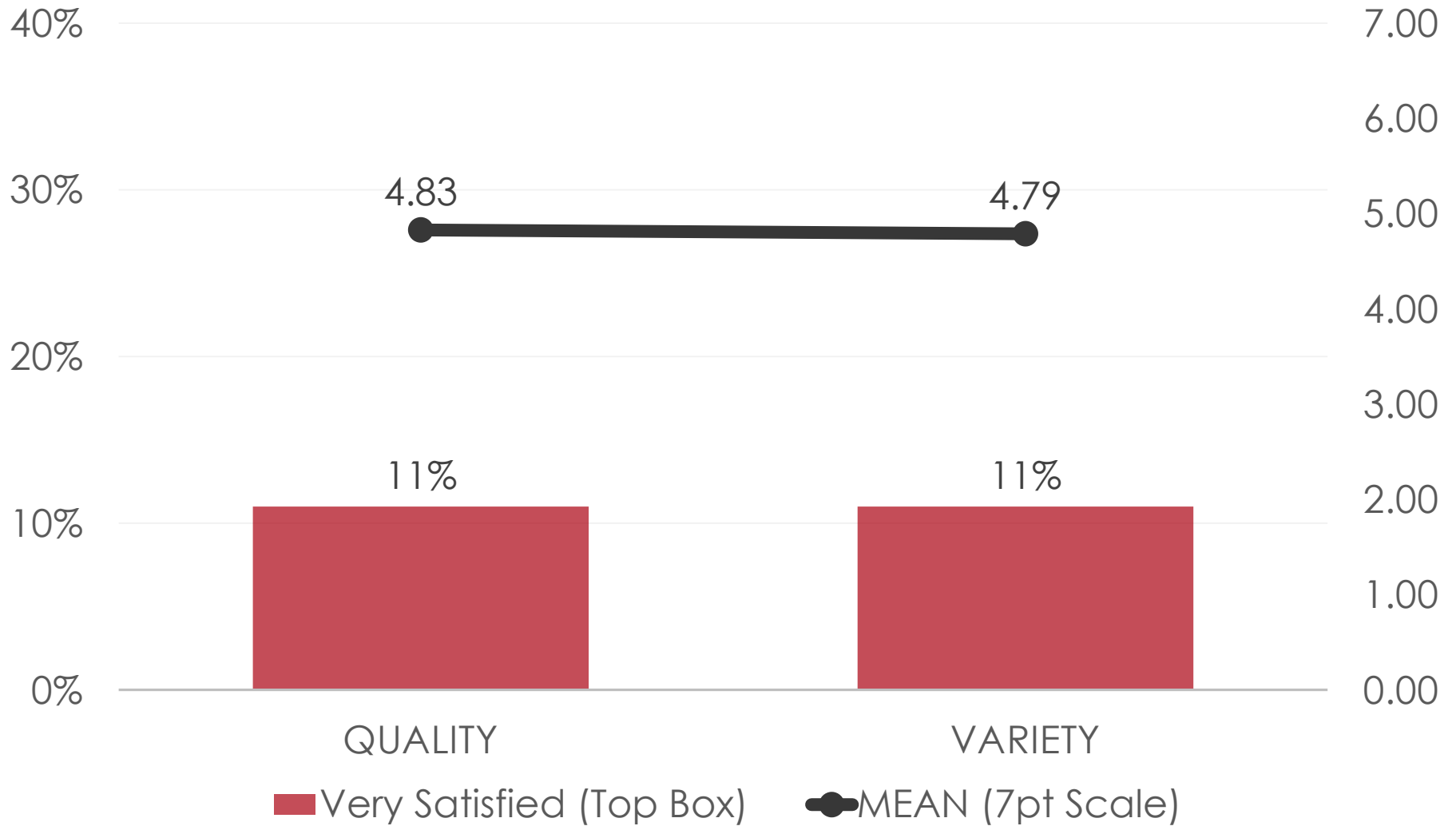
Top Responses only - Participation (5%+)



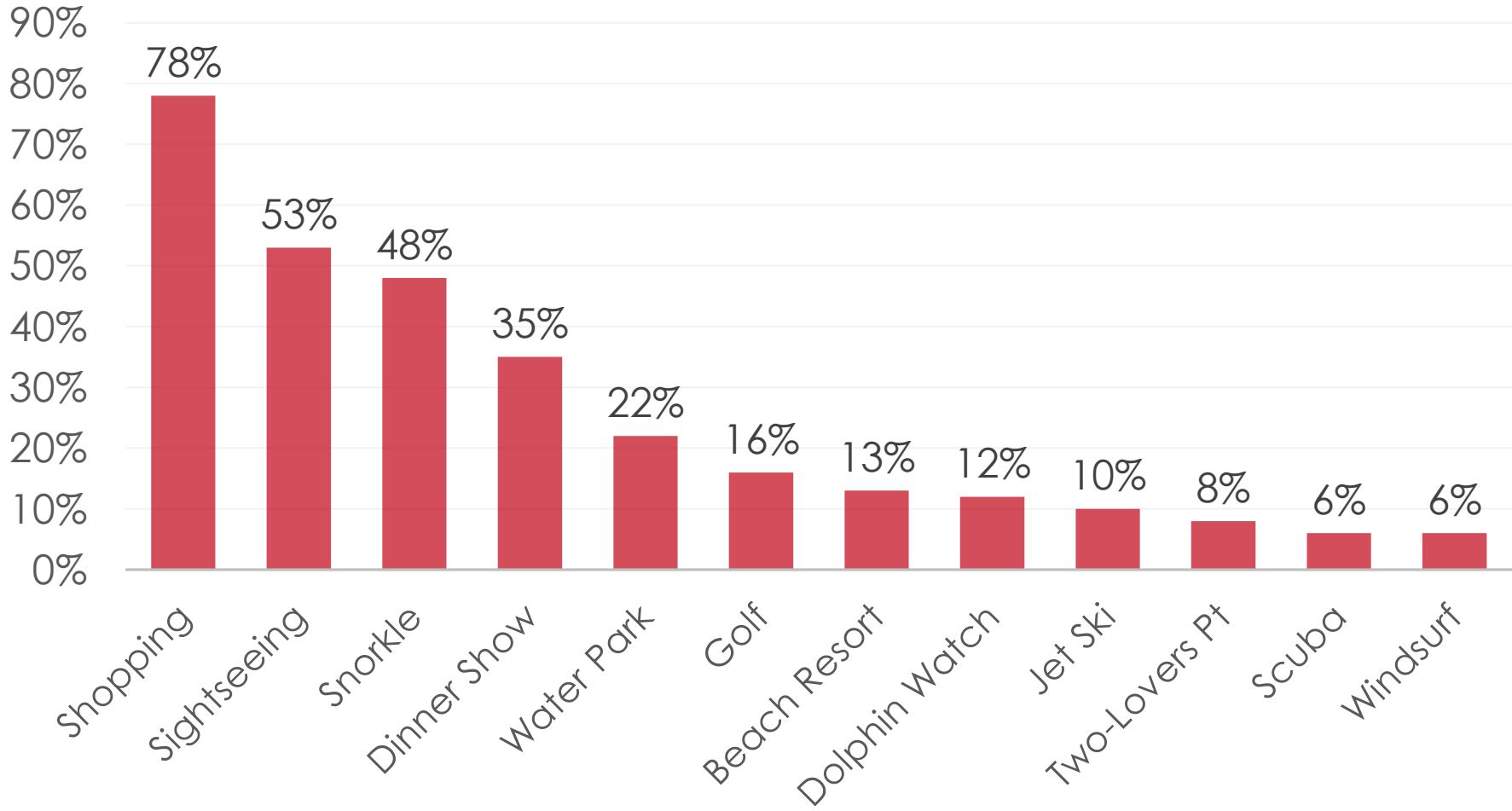
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

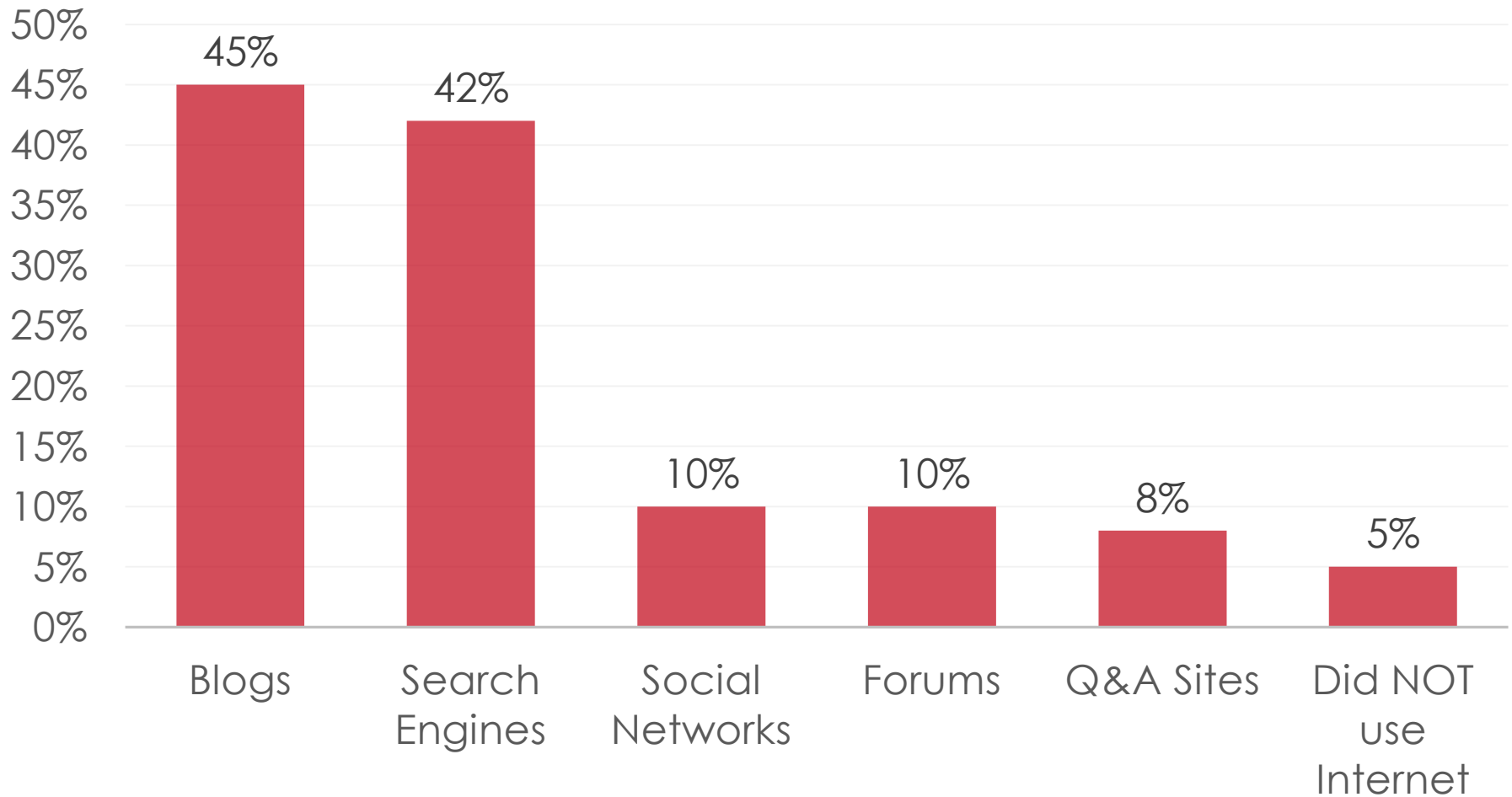


Activities Participation (Top Responses)



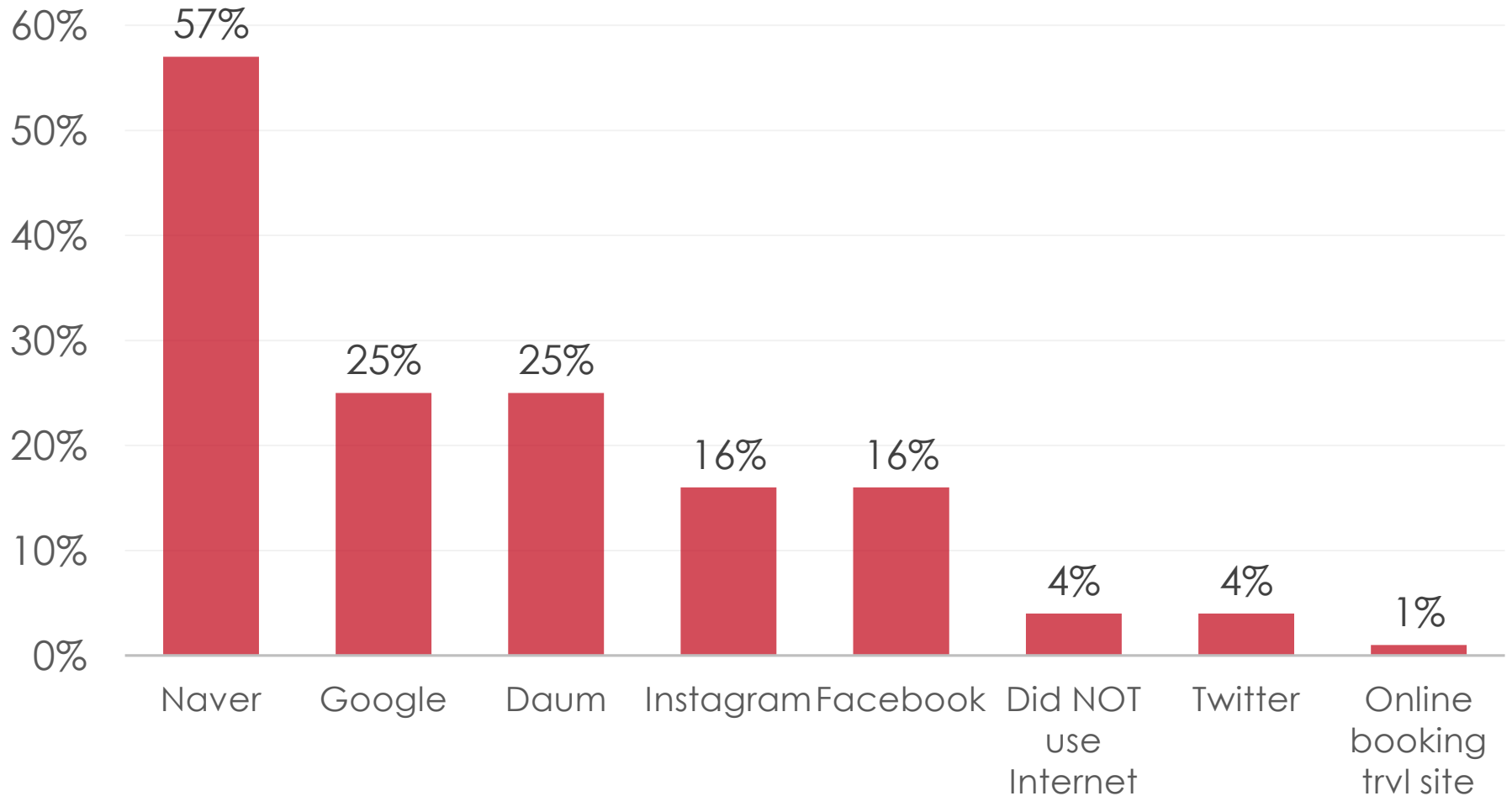
SECTION 5 PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



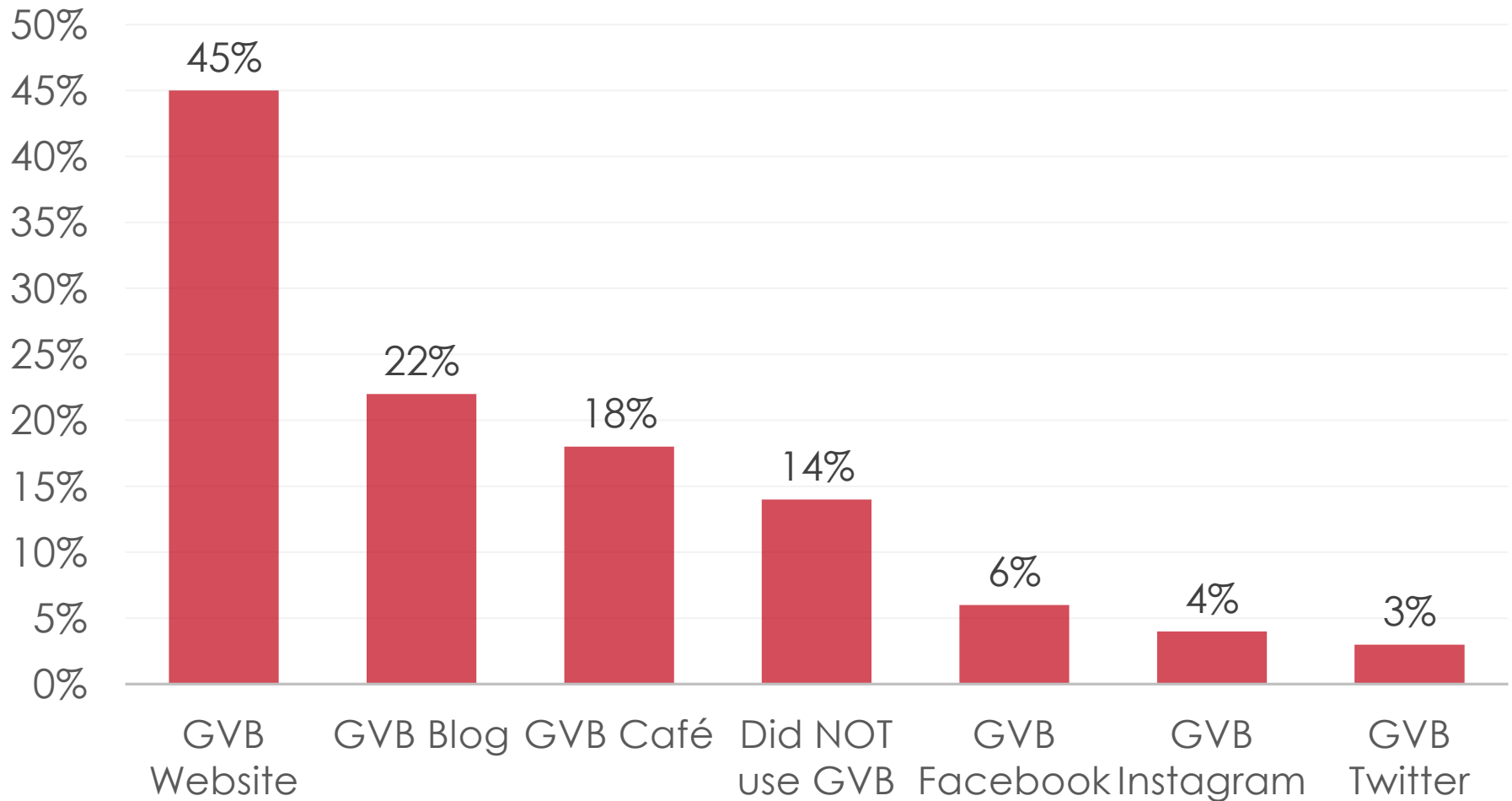
INTERNET- SOURCES OF INFORMATION

Things to do on Guam

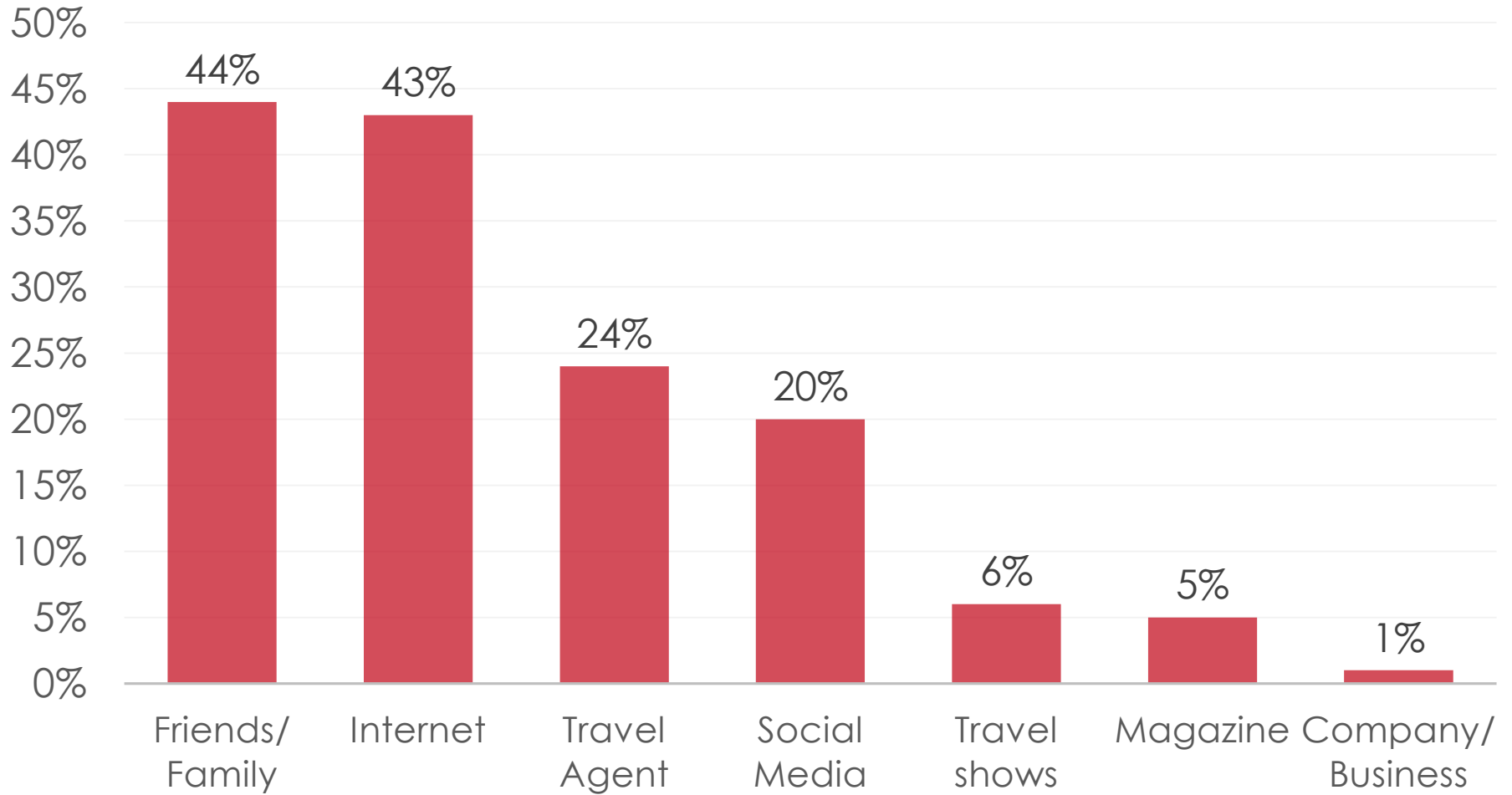


INTERNET- SOURCES OF INFORMATION

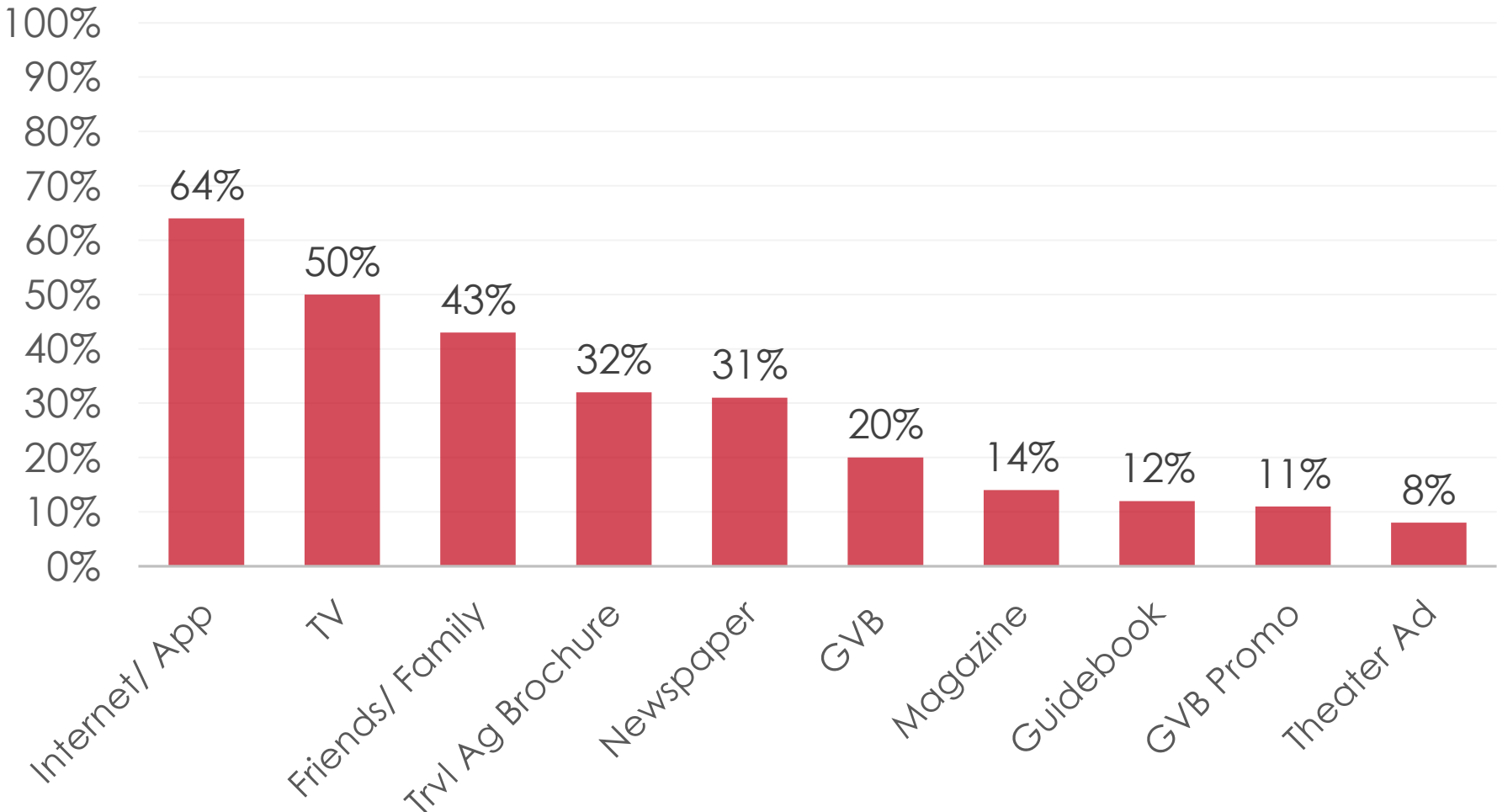
GVB



TRAVEL MOTIVATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION –

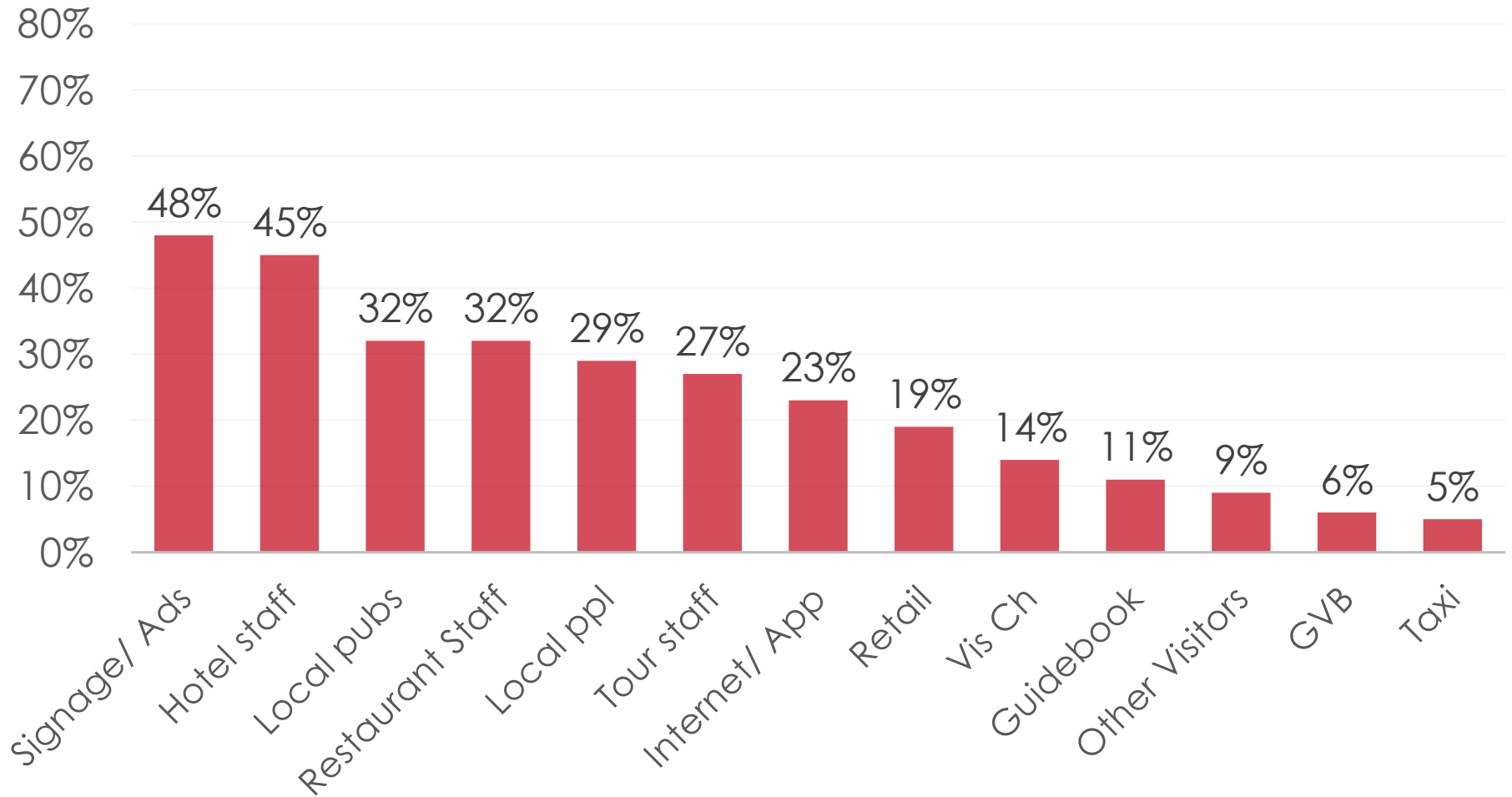
GVB EXIT SURVEY

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

| | | TOTAL | MICE | HONEYMOON | WEDDING | LEISURE | GROUP TOUR | REPEAT VISITOR | FAMILY | FIT |
|----|---|-------|------|-----------|---------|---------|------------|----------------|--------|-----|
| | | - | - | - | - | - | - | - | - | - |
| Q1 | Internet/Mobile App | 64% | 30% | 92% | 67% | 74% | 32% | 51% | 59% | 82% |
| | TV | 50% | 40% | 17% | 67% | 34% | 36% | 72% | 55% | 37% |
| | Friend or relative | 43% | | 17% | 67% | 53% | 32% | 38% | 36% | 56% |
| | Travel agent brochure | 32% | 40% | 100% | | 44% | 23% | 25% | 36% | 10% |
| | Newspaper | 31% | 20% | 42% | 33% | 28% | 45% | 20% | 35% | 19% |
| | Guam Visitors Bureau office | 20% | 60% | | | 13% | 45% | 25% | 21% | 23% |
| | Magazine (consumer) | 14% | | 17% | | 18% | 9% | 11% | 14% | 20% |
| | Travel guide book at bookstores | 12% | 20% | | 33% | 14% | 9% | 3% | 7% | 25% |
| | Guam Visitors Bureau promotional activities | 11% | 30% | 17% | | 6% | 27% | 7% | 12% | 7% |
| | Theater ads | 8% | 20% | | 33% | 4% | 18% | 7% | 10% | 5% |
| | I have been to Guam before | 6% | | | | 4% | 9% | 36% | 6% | 9% |
| | Co-worker/ company travel department | 3% | 20% | | | 4% | 5% | 2% | 2% | 4% |
| | Travel trade shows | 2% | 10% | | | 2% | 5% | 2% | 3% | 1% |
| | Consumer travel shows | 2% | 10% | | | 1% | 5% | | 2% | 2% |
| | Radio | 1% | | | | 1% | | | 1% | 1% |
| | Total | 357 | 10 | 12 | 3 | 180 | 22 | 61 | 310 | 117 |

ONISLE

SOURCES OF INFORMATION



ON-ISLE SOURCES OF INFORMATION – Key Segments

GVB EXIT SURVEY

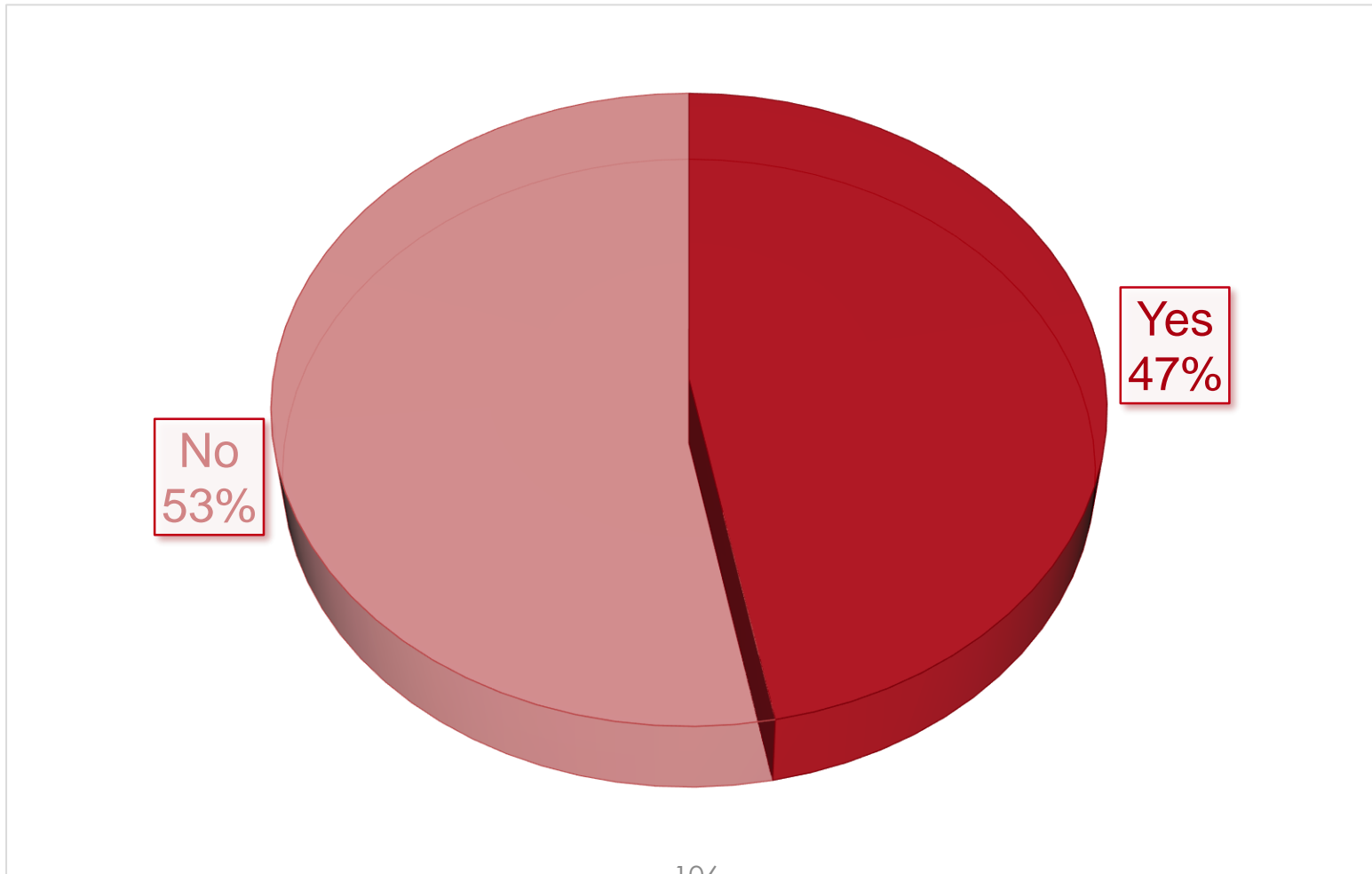
Q2 Please select the top three sources of information you used to find out about Guam while you were here:

| | | TOTAL | MICE | HONEYMOON | WEDDING | LEISURE | GROUP TOUR | REPEAT VISITOR | FAMILY | FIT |
|----|----------------------------------|-------|------|-----------|---------|---------|------------|----------------|--------|-----|
| | | - | - | - | - | - | - | - | - | - |
| Q2 | Signs/ advertisement | 48% | 30% | 50% | 33% | 50% | 50% | 39% | 49% | 50% |
| | Hotel staff | 45% | 20% | 58% | 67% | 38% | 18% | 61% | 48% | 36% |
| | Local publication | 32% | 20% | 25% | | 36% | 32% | 33% | 33% | 30% |
| | Restaurant staff (outside hotel) | 32% | 40% | 17% | 67% | 25% | 36% | 43% | 34% | 21% |
| | Local people | 29% | 50% | 8% | | 24% | 32% | 39% | 29% | 32% |
| | Tour staff | 27% | 20% | 92% | 33% | 39% | 14% | 15% | 27% | 20% |
| | Internet/Mobile App | 23% | 20% | 25% | 33% | 31% | 9% | 13% | 16% | 43% |
| | Retail staff | 19% | 60% | | 33% | 11% | 45% | 25% | 21% | 13% |
| | Visitors channel | 14% | 30% | | | 14% | 14% | 7% | 15% | 9% |
| | Guide books I brought with me | 11% | 10% | 8% | 33% | 16% | | 3% | 5% | 26% |
| | Other visitors | 9% | | | | 4% | 36% | 7% | 11% | 9% |
| | Guam Visitors Bureau | 6% | | | | 2% | 9% | 10% | 6% | 6% |
| | Taxi drivers | 5% | | 8% | | 8% | 5% | 3% | 5% | 5% |
| | Total | 357 | 10 | 12 | 3 | 180 | 22 | 61 | 310 | 117 |

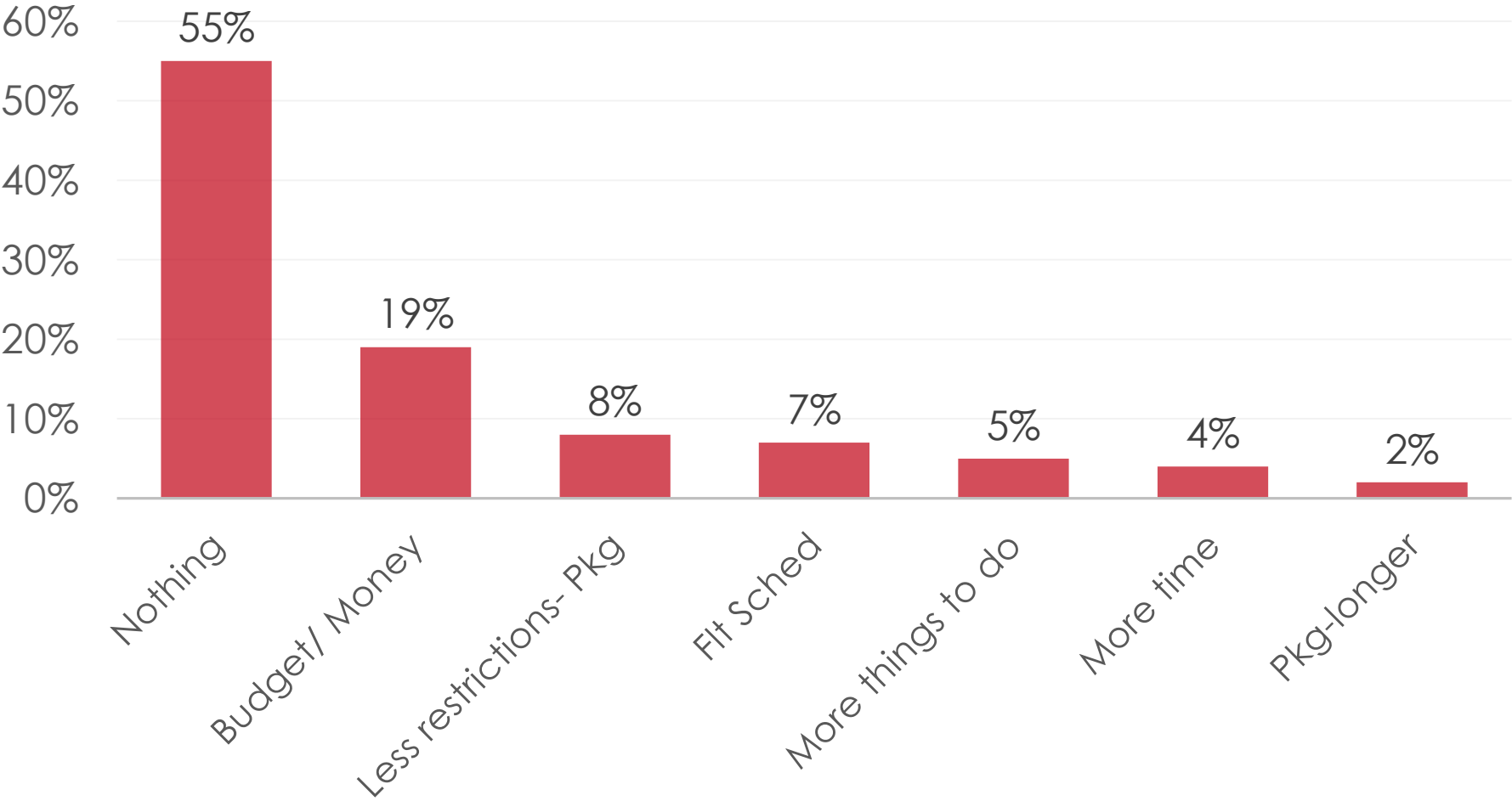
SECTION 6

FUTURE TRAVEL TO GUAM

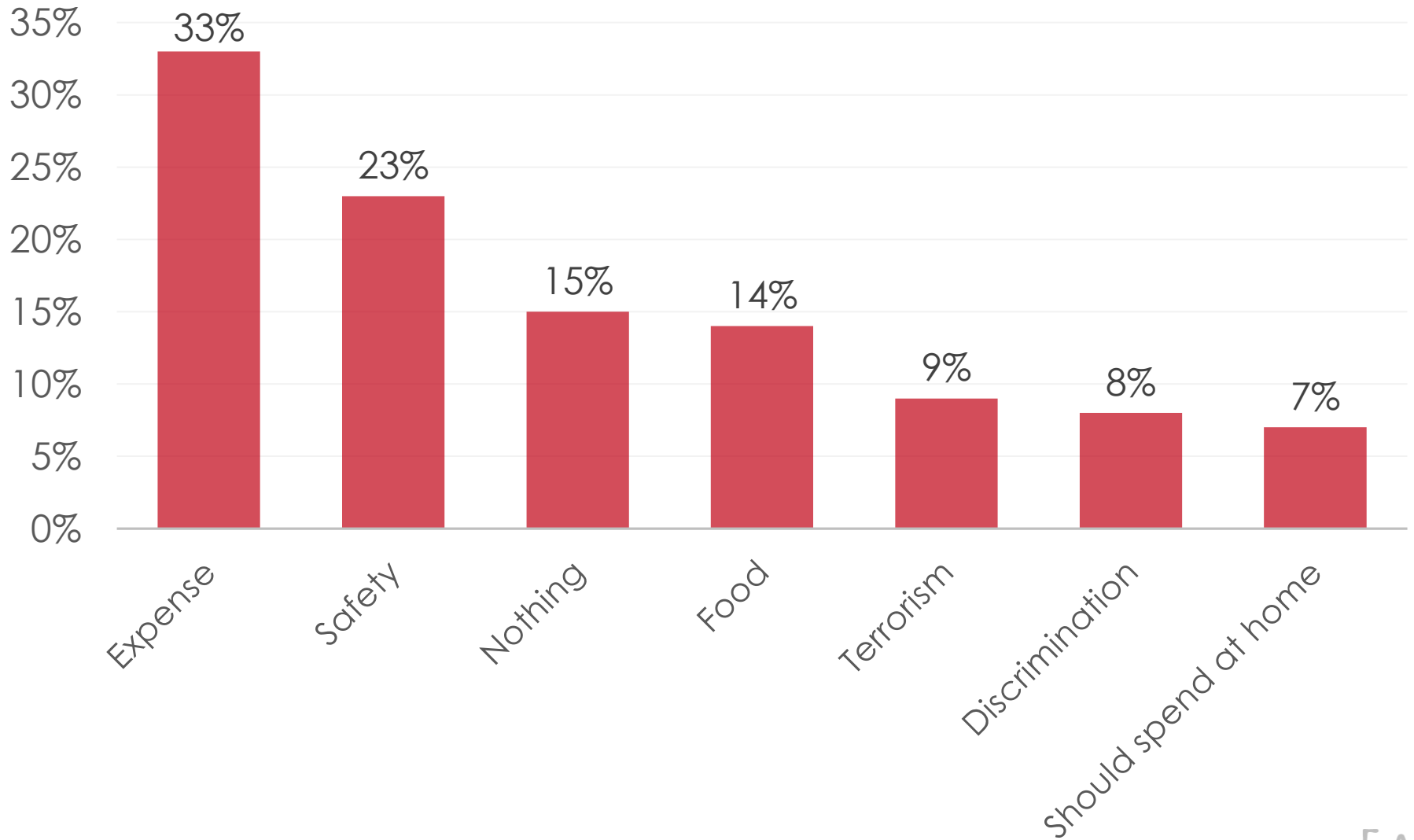
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



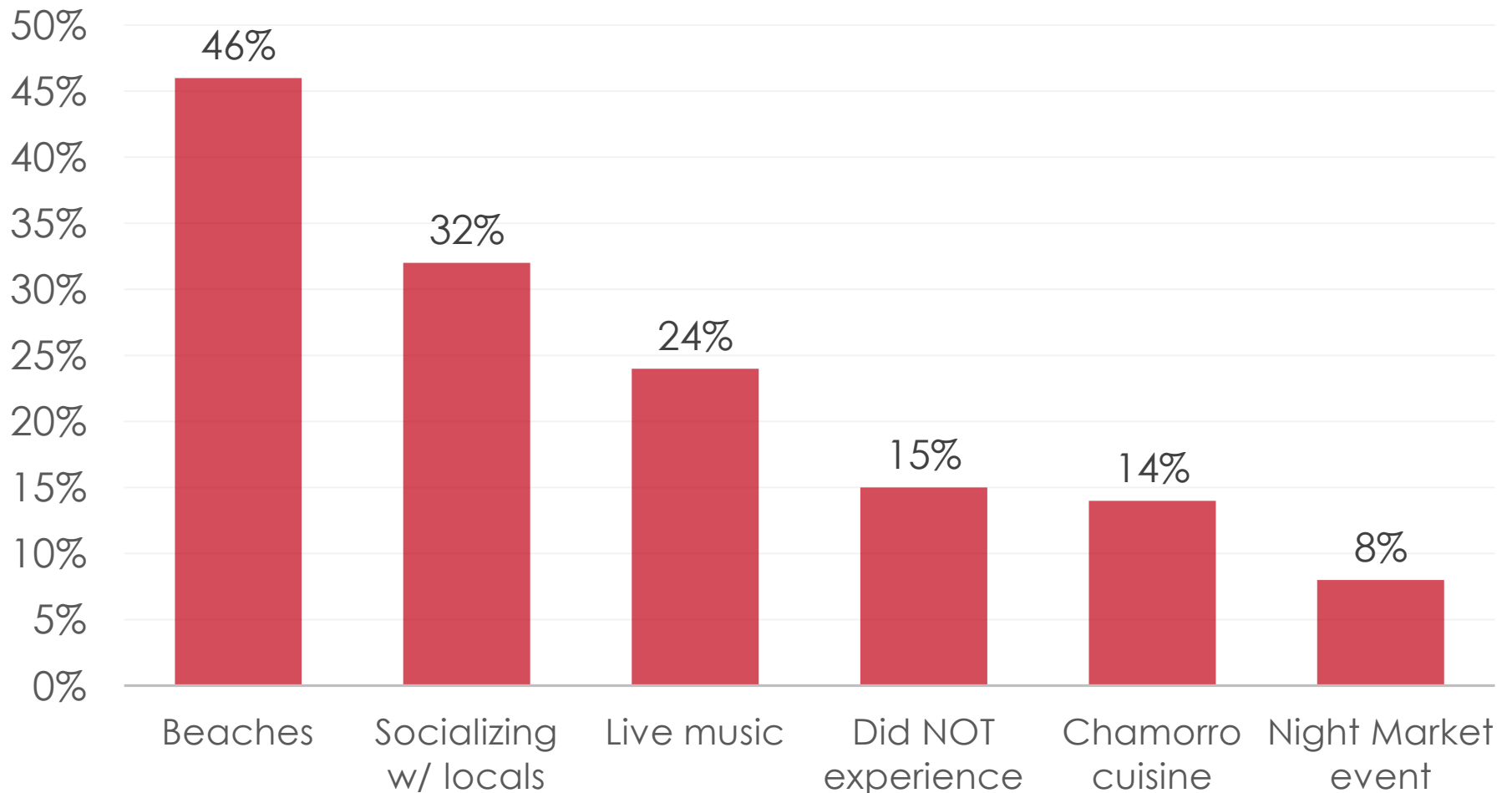
FUTURE TRAVEL CONCERNS



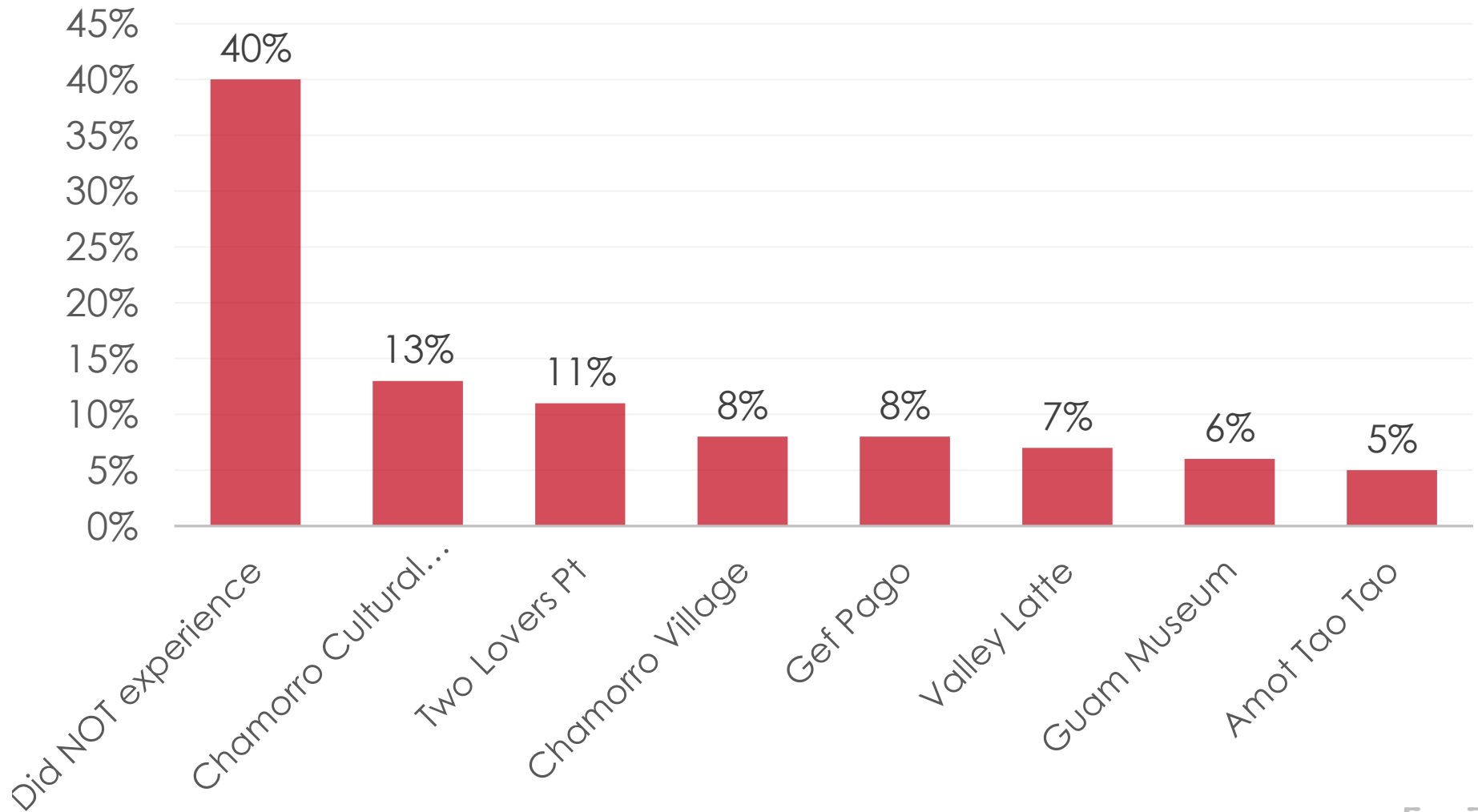
SECTION 7

GUAM CULTURE

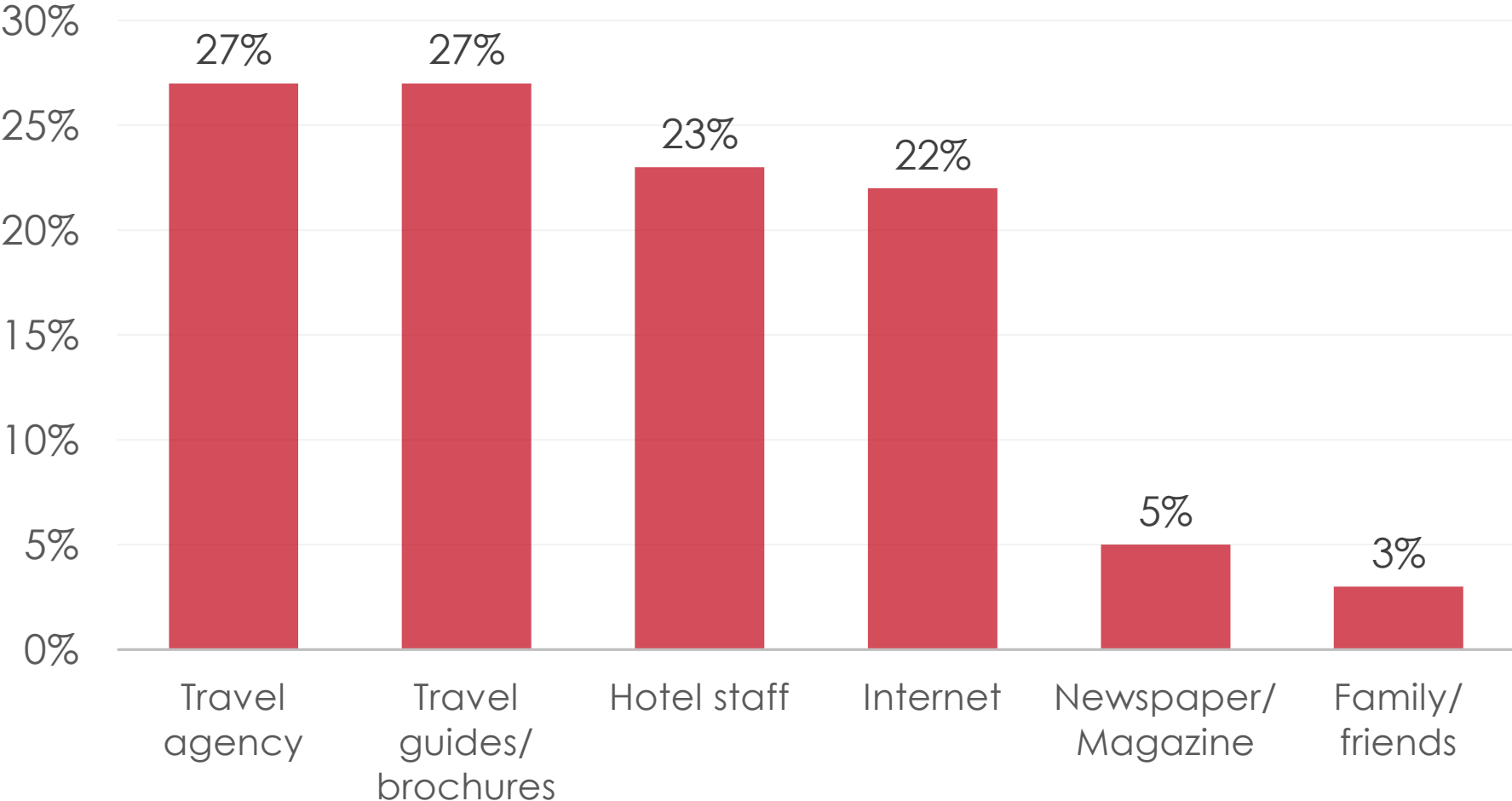
EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT



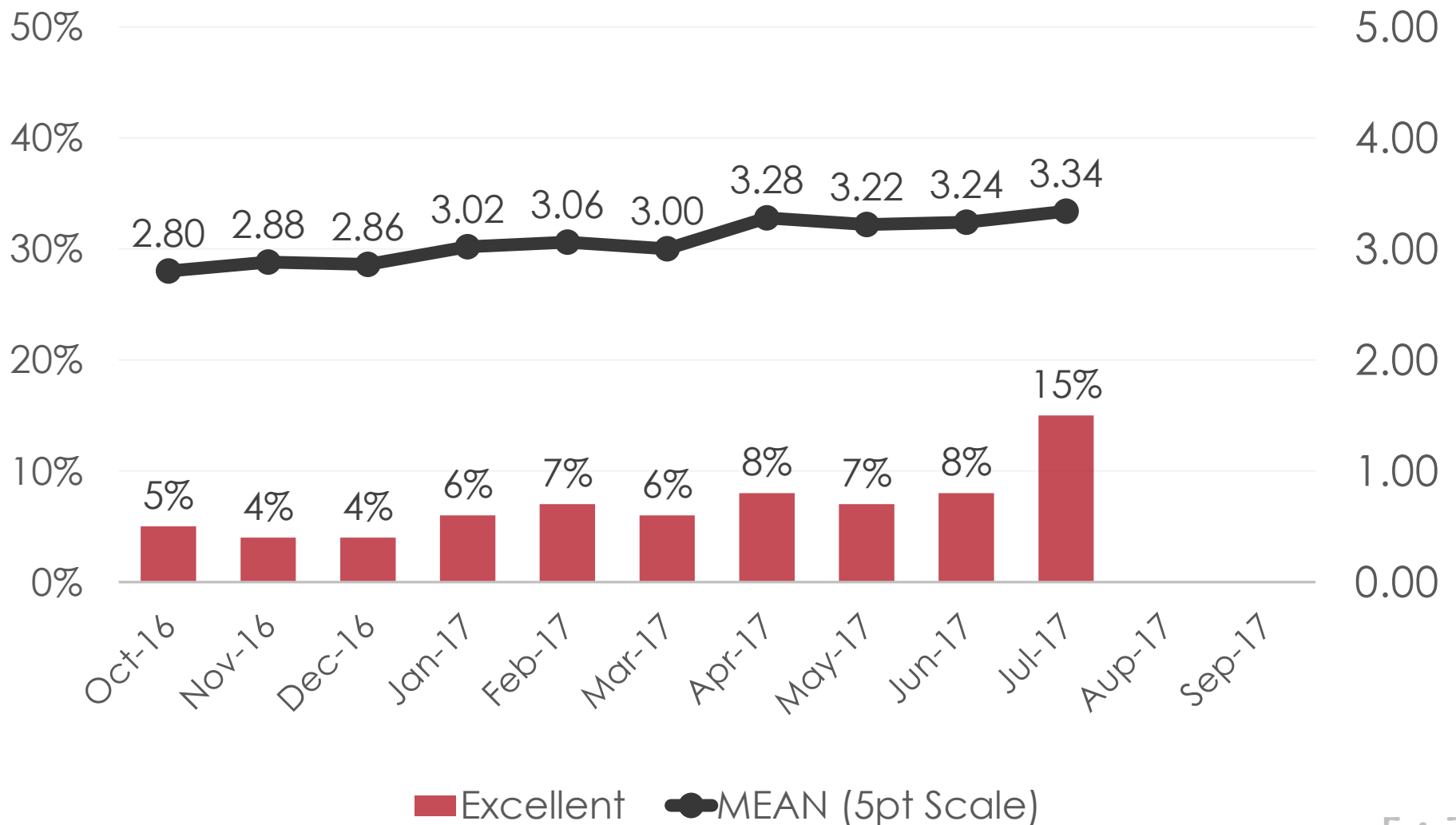
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



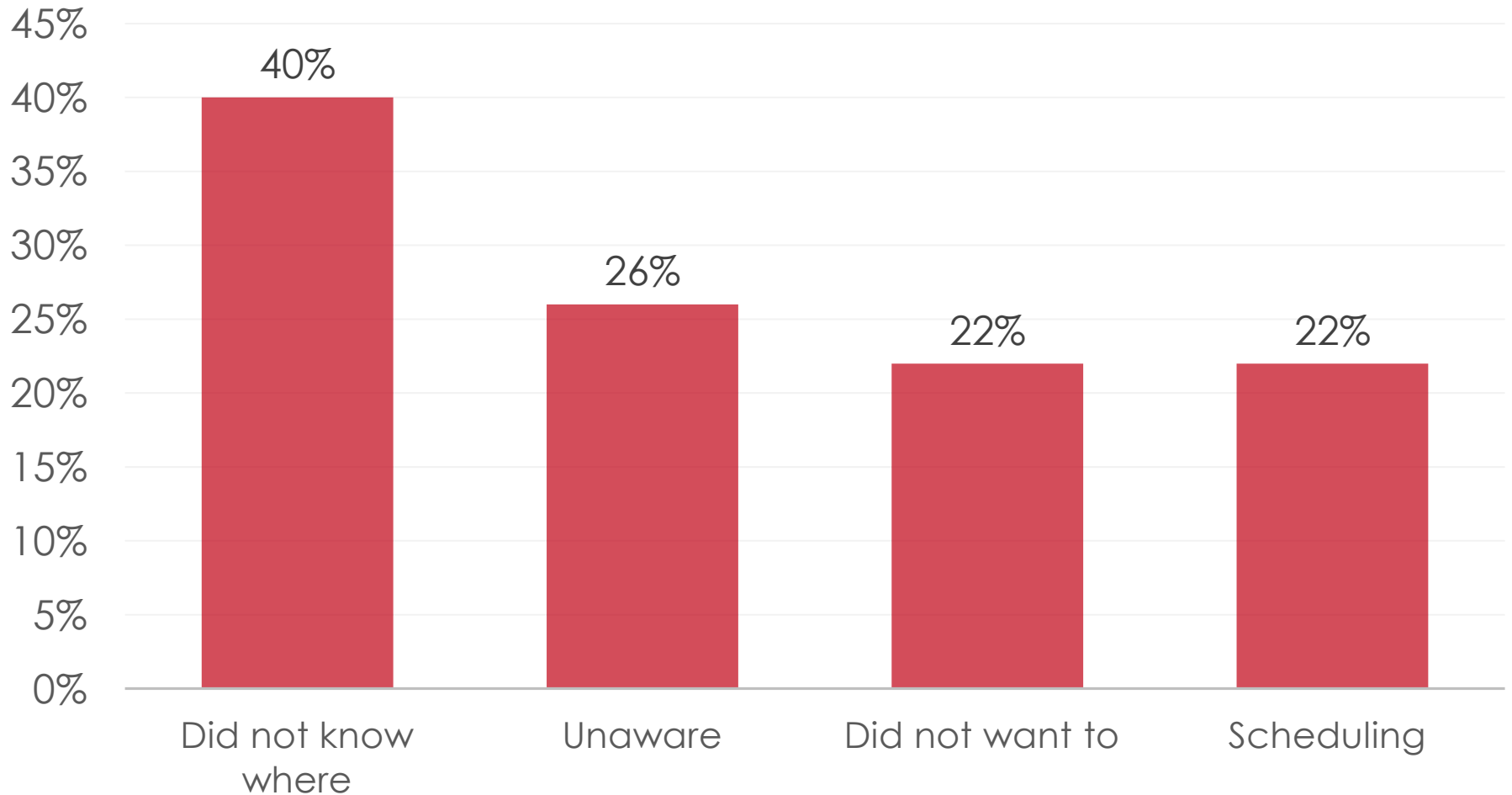
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



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, Mar, Apr, May, Jun, Jul 2017 and Overall Oct 2016 - Jul 2017

| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Combined Oct 2016 - July 2017 |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---|
| Drivers: | rank | rank | rank | rank | rank | rank | rank | rank | rank | rank | rank |
| Quality & Cleanliness of beaches & parks | 3 | 3 | | 3 | 6 | | | | | | 6 |
| Ease of getting around | | | 4 | | | | | | | | 8 |
| Safety walking around at night | 7 | | | | | | | | | 4 | 11 |
| Quality of daytime tours | | | 3 | | 2 | | | | | 1 | |
| Variety of daytime tours | | | | | | 3 | | | 2 | | 3 |
| Quality of nighttime tours | | | | | | | 2 | 4 | | | 12 |
| Variety of nighttime tours | | | | | | | | | | | |
| Quality of shopping | | | 6 | 2 | | | 5 | | | | 9 |
| Variety of shopping | 6 | | | | | 7 | | | | | |
| Price of things on Guam | | | | | | 6 | | | | | |
| Quality of hotel accommodations | 4 | 4 | | | 4 | | | 2 | 4 | 3 | 4 |
| Quality/cleanliness of air, sky | | | | | | 4 | 3 | 6 | 3 | | 7 |
| Quality/cleanliness of parks | 1 | | | | 5 | | | | | 2 | |
| Quality of landscape in Tumon | | 2 | 1 | 1 | 1 | 1 | 1 | | | | 1 |
| Quality of landscape in Guam | | | 5 | 4 | | 5 | | 1 | | | 10 |
| Quality of ground handler | 5 | | 2 | | | | 4 | 5 | 5 | | 5 |
| Quality/cleanliness of transportation vehicles | 2 | 1 | | | 3 | 2 | | 3 | 1 | 5 | 2 |
| % of Per Person On Island Expenditures Accounted For | 64.0% | 61.8% | 44.1% | 40.8% | 57.5% | 56.1% | 45.3% | 50.2% | 42.7% | 47.3% | 50.3% |

NOTE: Only significant drivers are included.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by five significant factors in the July 2017 Period. By rank order they are:
 - **Quality of day time tours,**
 - **Quality/cleanliness of parks,**
 - **Quality of hotel accommodations,**
 - **Safety walking around at night, and**
 - **Quality/cleanliness of transportation vehicles.**
- With all five factors the overall r^2 is .473 meaning that **47.3% 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, Mar, Apr, May, Jun, Jul 2017 and Overall Oct 2016-Jul 2017 | | | | | | | | | | | |
|---|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|----------------------------|
| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Combined Oct 2016-Jul 2017 |
| Drivers: | rank | rank | rank | rank | rank | rank | rank | rank | rank | rank | rank |
| Quality & Cleanliness of beaches & parks | 1 | | | | | | | | | | |
| Ease of getting around | | 2 | | | | | | | | 3 | |
| Safety walking around at night | | | | | | | | | | | |
| Quality of daytime tours | | | | | | | | | | | |
| Variety of daytime tours | | | | | | | | 1 | | | |
| Quality of nighttime tours | | | | | | | | | | | 2 |
| Variety of nighttime tours | | | | | | | | | | | |
| Quality of shopping | | 3 | | | | | | | | 1 | |
| Variety of shopping | | | | | | | | | | | |
| Price of things on Guam | | 1 | | | | | | | | | |
| Quality of hotel accommodations | | | | | 1 | | | | | | |
| Quality/cleanliness of air, sky | | | | | | 1 | | | 1 | | |
| Quality/cleanliness of parks | | | | | | | | | | | |
| Quality of landscape in Tumon | | | | | | | | | | | |
| Quality of landscape in Guam | | | | | | | | | | | |
| Quality of ground handler | 2 | | | | | | | | | 2 | |
| Quality/cleanliness of transportation vehicles | | | | | | | | | | | 1 |
| % of Per Person On Island Expenditures Accounted For | 5.9% | 7.2% | 0.0% | 0.0% | 2.0% | 1.5% | 0.0% | 2.6% | 1.4% | 9.8% | 0.5% |

NOTE: Only significant drivers are included.

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Korean visitors on Guam is driven by three significant factors in the July 2017 period. By rank order they are:
 - **Quality of shopping,**
 - **Quality of ground handler, and**
 - **Ease of getting around.**
- With these factors the overall r^2 is .098 meaning that **9.8% of per person on island expenditure is accounted for by these factors.**