

# Guam Visitors Bureau

## Taiwan Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

QTR.2 (JANUARY – MARCH 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 Taiwanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **150** departing Taiwanese 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 **150** is +/- 8.00 percentage points with a 95% confidence level. That is, if all Taiwanese 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 +/- 8.00 percentage points.

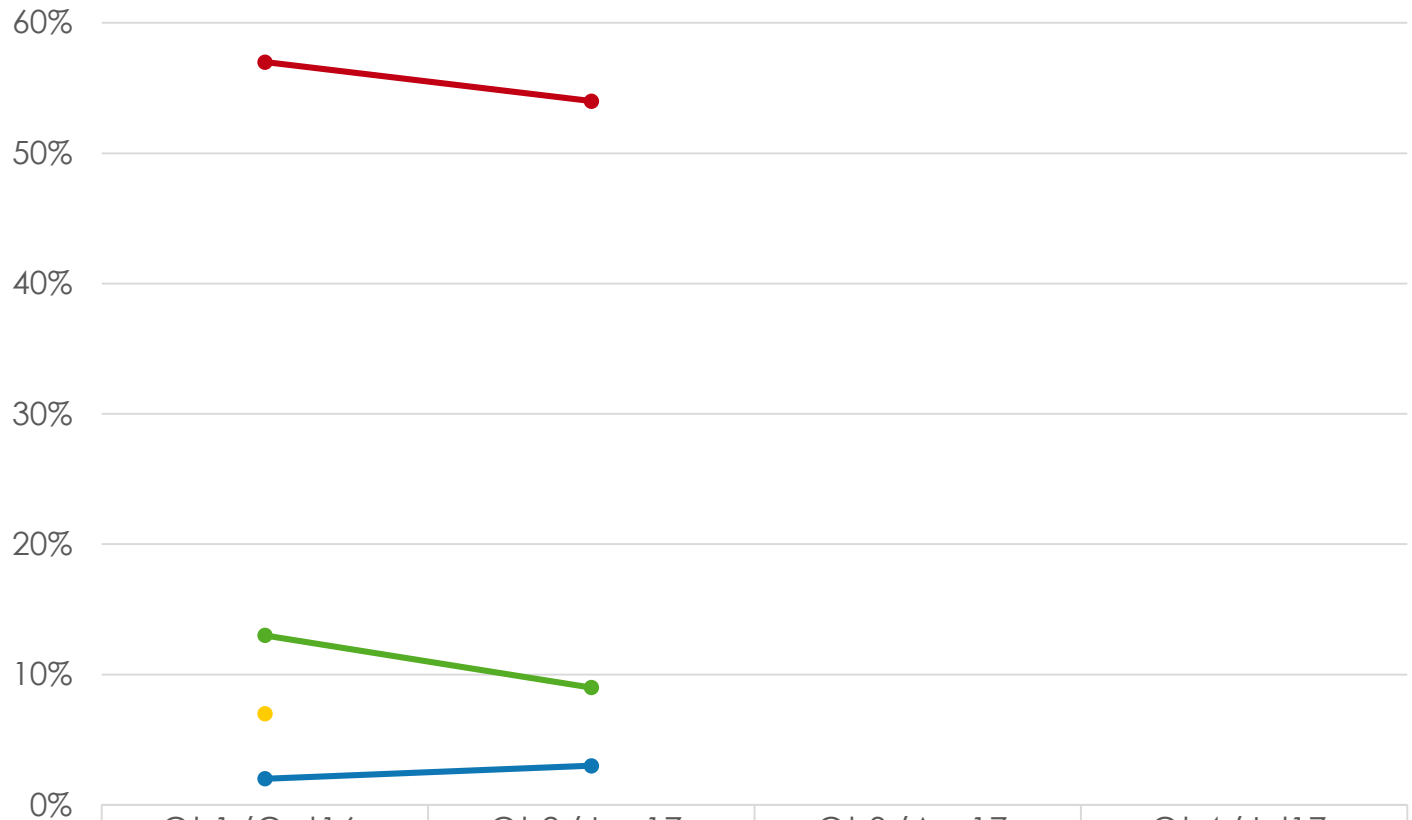
# Objectives

- To monitor the effectiveness of the Taiwan seasonal campaigns in attracting Taiwan visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Taiwan 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)
    - Sports/ Adventure Traveler (Q5A Organized sporting activity/ Scuba/ Water sports, Q18 Skydiving, Q19 Scuba, snorkel, windsurf)
    - Wedding (Q5A)
    - Honeymoon (Q5A)
  - To identify the most significant factors affecting overall visitor satisfaction.
  - To identify (for all Taiwanese visitors) the most important determinants of on-island spending

# Key Highlighted Segments

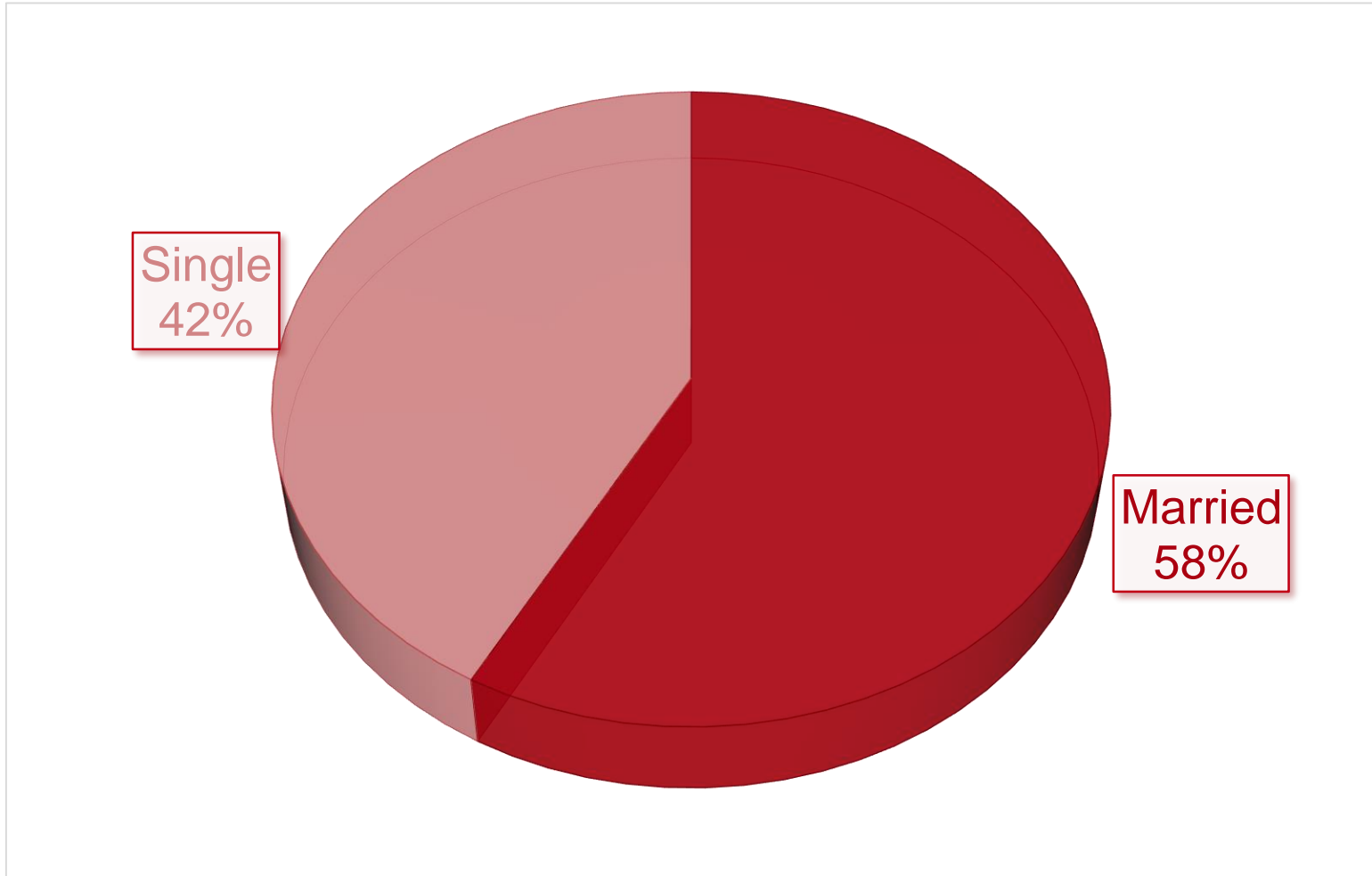


|                       | Qtr1 (Oct16-<br>Dec16) | Qtr2 (Jan17-<br>Mar17) | Qtr3 (Apr17-<br>Jun17) | Qtr4 (Jul17-<br>Sept17) |
|-----------------------|------------------------|------------------------|------------------------|-------------------------|
| —●— MICE              | 2%                     | 3%                     |                        |                         |
| —●— Sports/ Adventure | 57%                    | 54%                    |                        |                         |
| —●— Honeymoon         | 13%                    | 9%                     |                        |                         |
| —●— Wedding           | 7%                     |                        |                        |                         |

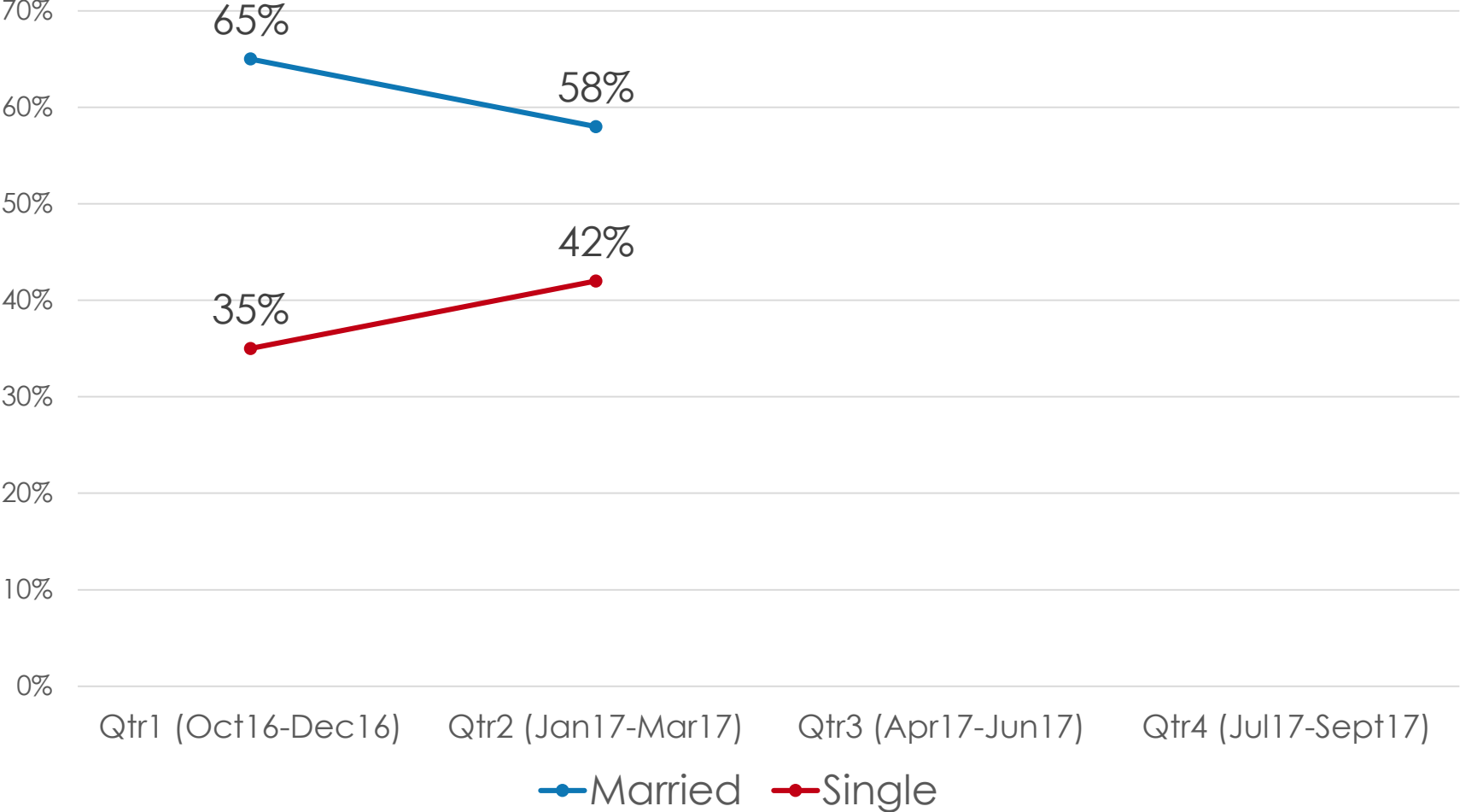
# SECTION 1

# PROFILE OF RESPONDENTS

# Marital Status



# Marital status – FY2017 Tracking





# Marital status – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

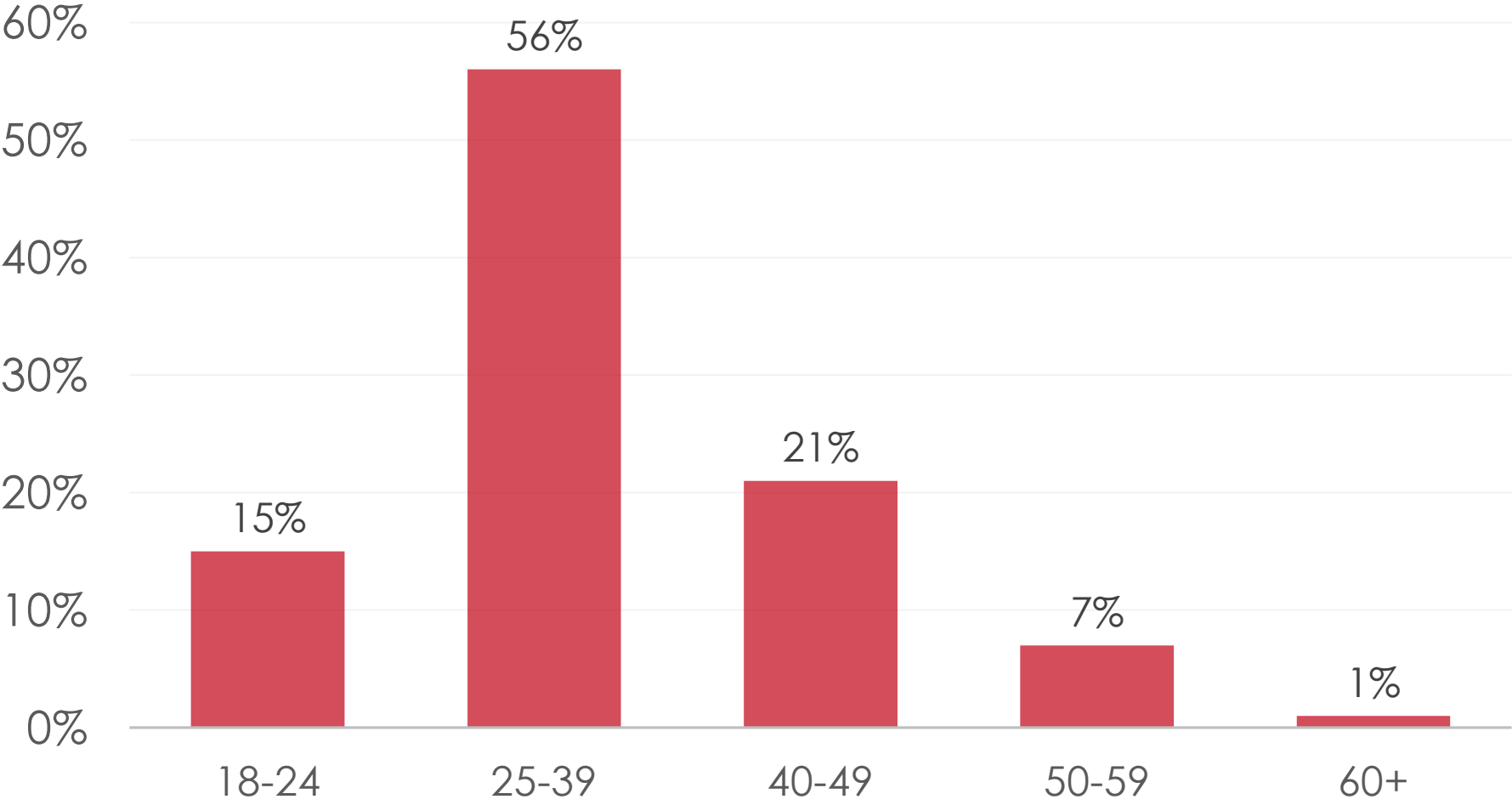
### QE Are you married or single?

|    |         | TOTAL | MICE | SPORTS/<br>ADVENTURE | HONEYMOON |
|----|---------|-------|------|----------------------|-----------|
|    |         | -     | -    | -                    | N         |
| QE | Married | 58%   | 75%  | 60%                  | 92%       |
|    | Single  | 42%   | 25%  | 40%                  | 8%        |
|    | Total   | 151   | 4    | 82                   | 13        |

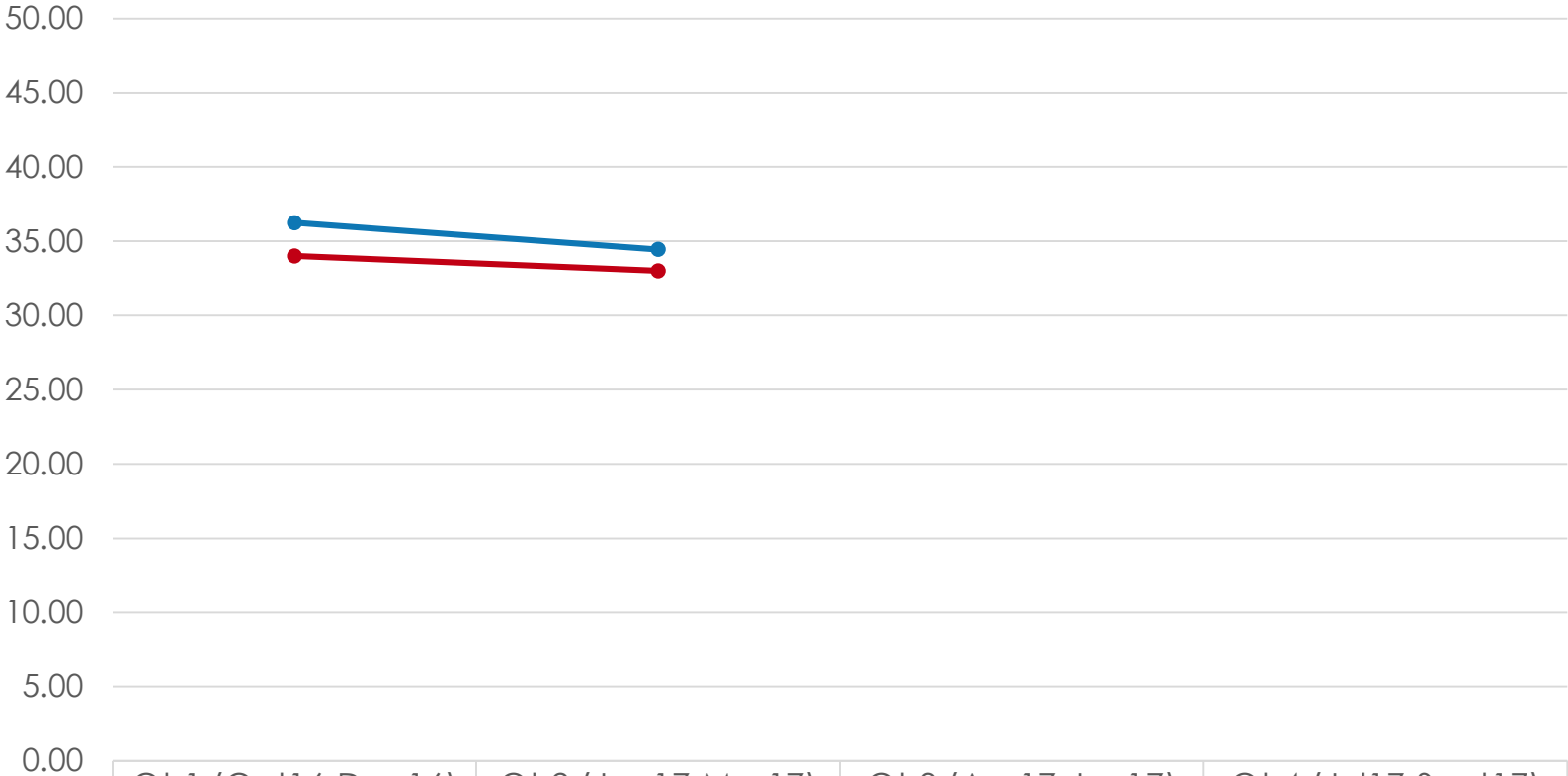
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# Age

MEAN = 34.44  
MEDIAN = 33



# Age – FY2017 Tracking



|        | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN   | 36.24              | 34.44              |                    |                     |
| MEDIAN | 34                 | 33                 |                    |                     |

# Age – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

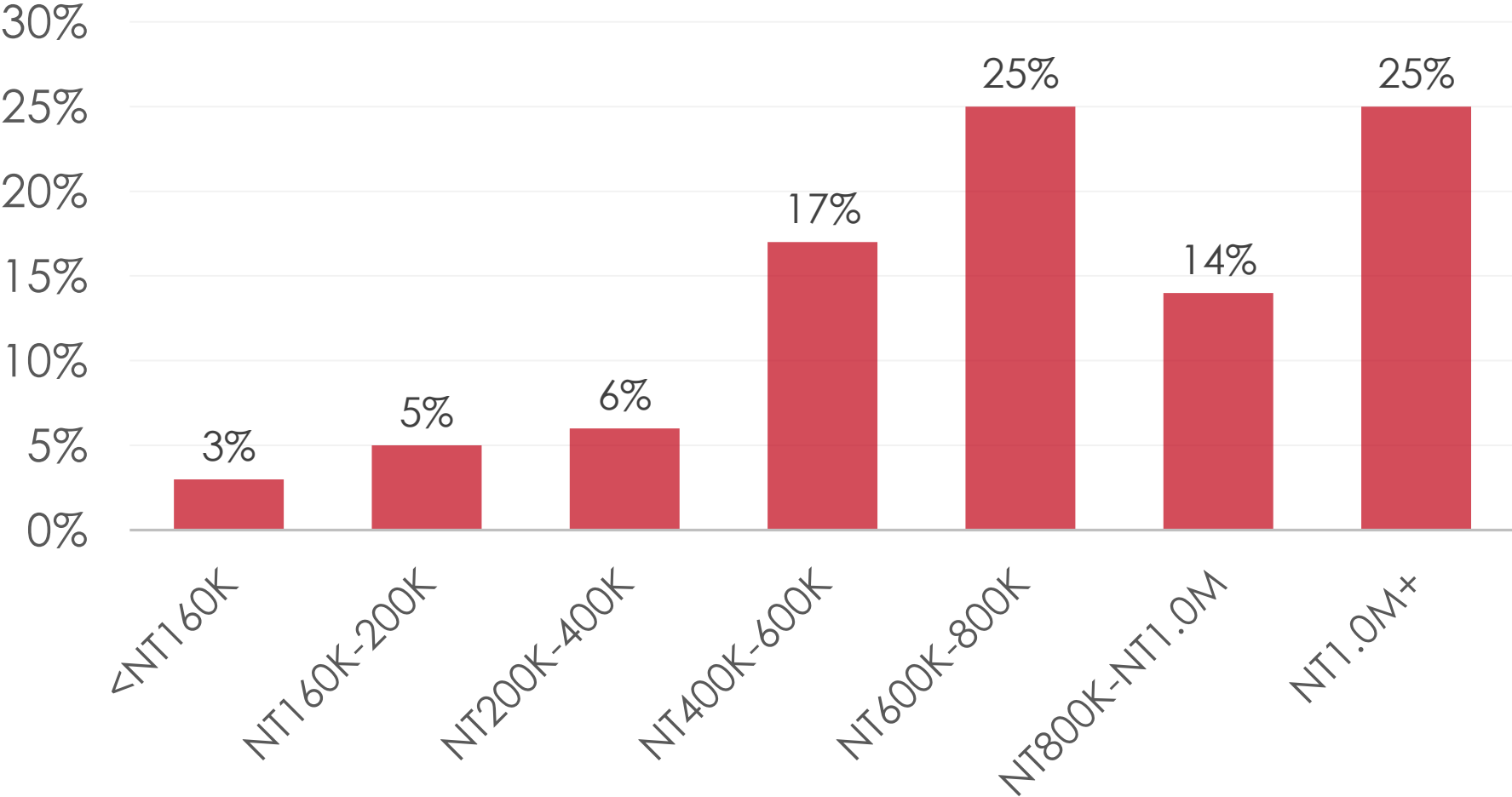
### QF And what was your age on your last birthday?

|    |        | TOTAL | MICE  | SPORTS/<br>ADVENTURE | HONEYMOON |
|----|--------|-------|-------|----------------------|-----------|
|    |        | -     | -     | -                    | -         |
| QF | 18-24  | 15%   |       | 20%                  | 8%        |
|    | 25-39  | 56%   | 75%   | 55%                  | 92%       |
|    | 40-49  | 21%   | 25%   | 20%                  |           |
|    | 50-59  | 7%    |       | 6%                   |           |
|    | 60+    | 1%    |       |                      |           |
|    | Total  | 151   | 4     | 82                   | 13        |
| QF | Mean   | 34.44 | 34.50 | 33.35                | 29.77     |
|    | Median | 33    | 36    | 32                   | 30        |

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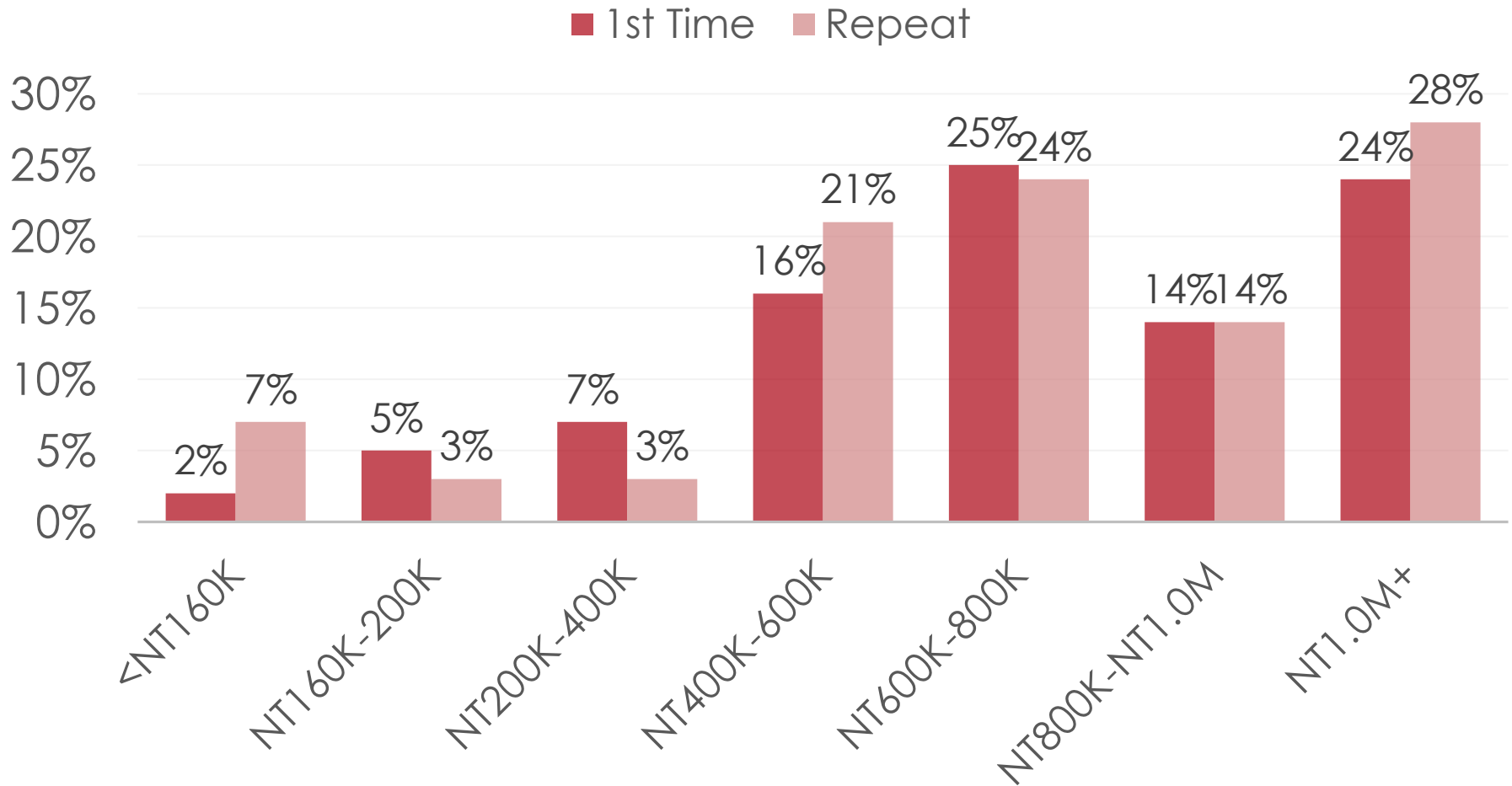
# Annual Household Income

EXCHANGE RATE NT30.37=\$1



# Annual Household Income

EXCHANGE RATE NT30.37=\$1



# Annual Household Income – Key Segments

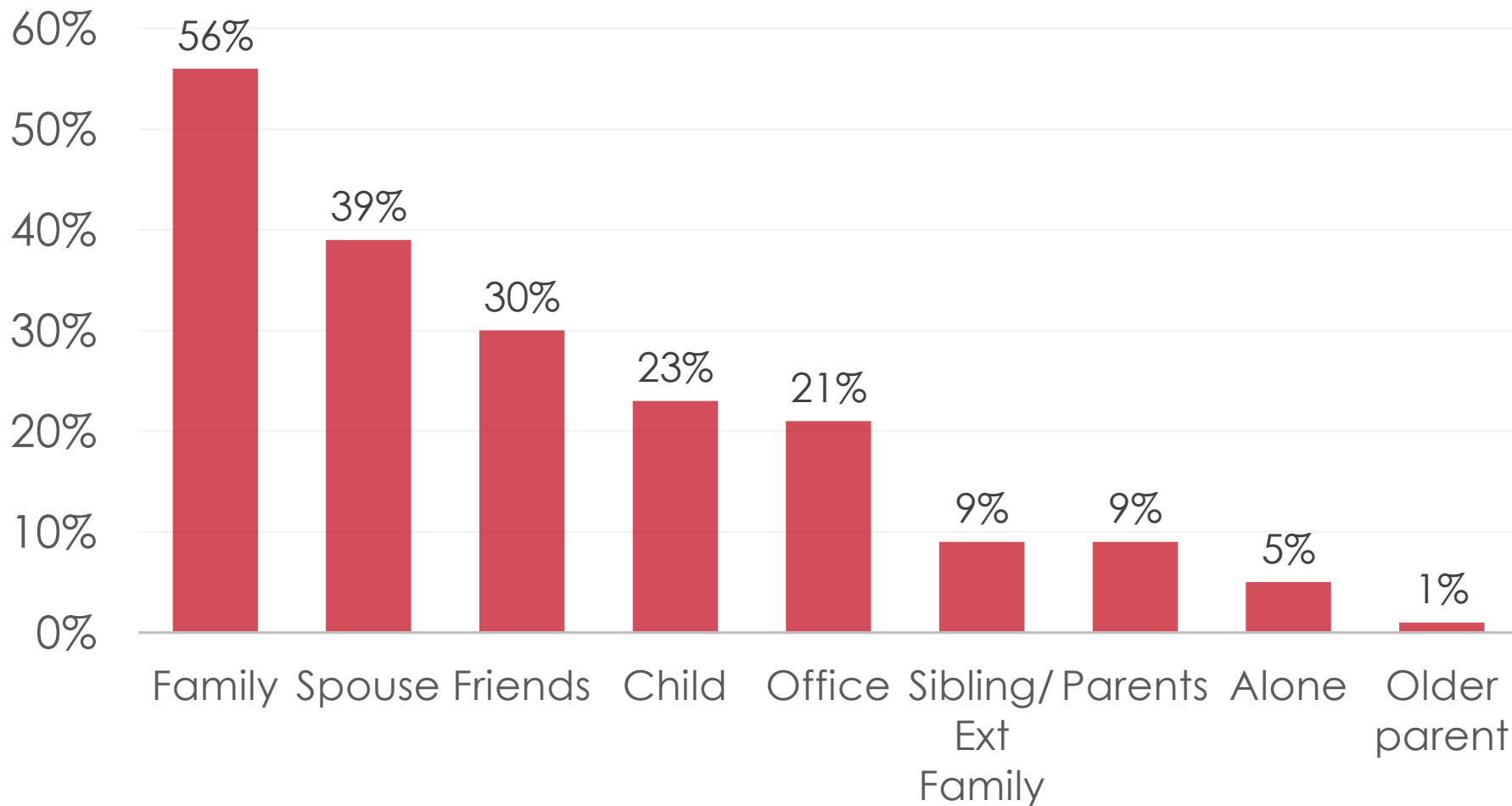
## GUAM VISITORS BUREAU - EXIT SURVEY

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

|     |               | TOTAL | MICE | SPORTS/<br>ADVENTURE | HONEYMOON |
|-----|---------------|-------|------|----------------------|-----------|
|     |               | -     | -    | -                    | -         |
| Q26 | <=NT160K      | 3%    |      | 4%                   | 8%        |
|     | NT160K-NT200K | 5%    |      | 4%                   | 8%        |
|     | NT200K-NT400K | 6%    |      | 4%                   | 8%        |
|     | NT400K-NT600K | 17%   |      | 20%                  | 23%       |
|     | NT600K-NT800K | 25%   | 25%  | 22%                  | 15%       |
|     | NT800K-NT1.0M | 14%   |      | 18%                  | 15%       |
|     | NT1.0M+       | 25%   | 75%  | 22%                  | 8%        |
|     | No Income     | 6%    |      | 7%                   | 15%       |
|     | Total         | 151   | 4    | 82                   | 13        |

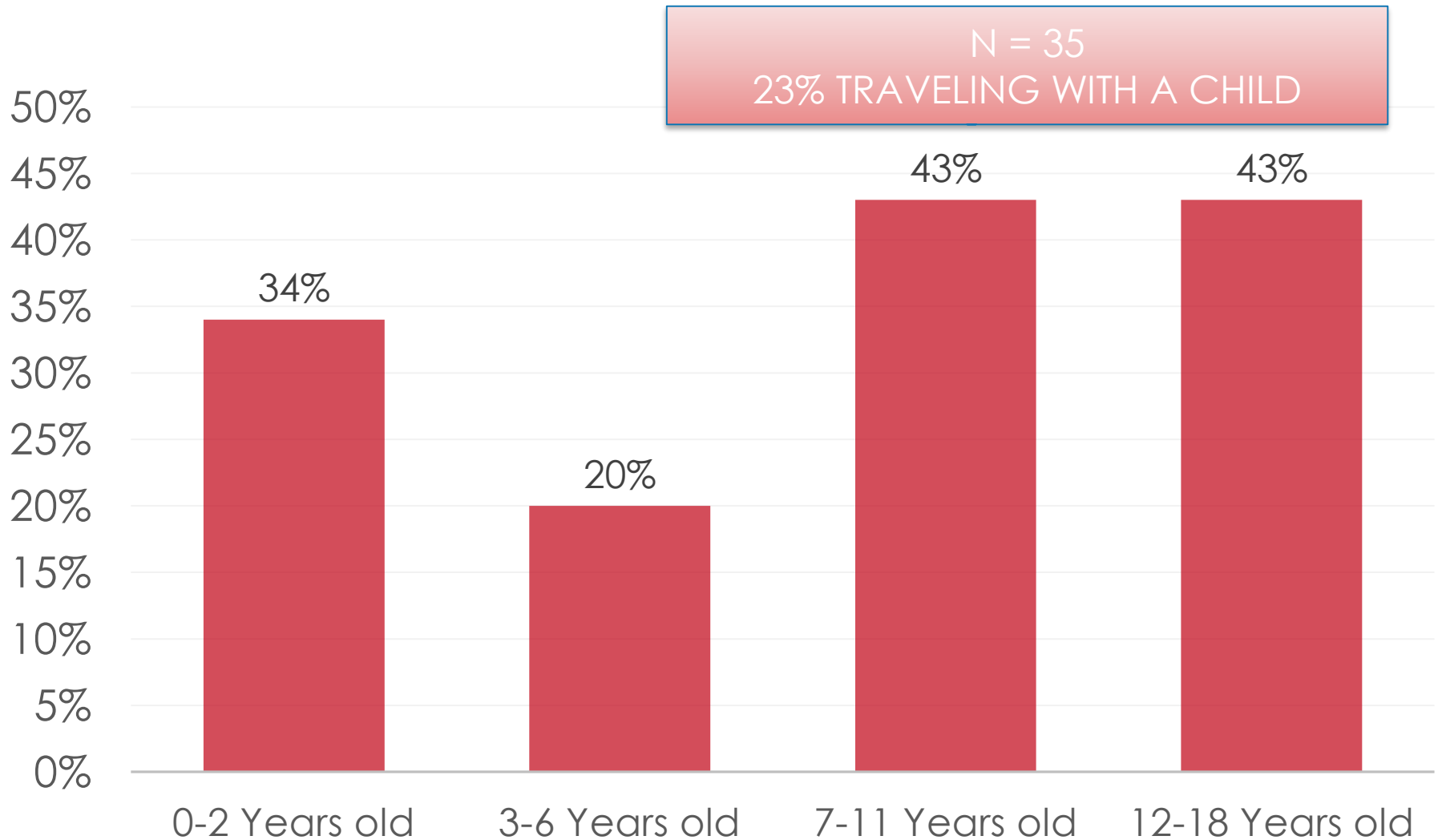
Prepared by QMark Research

# Travel Party

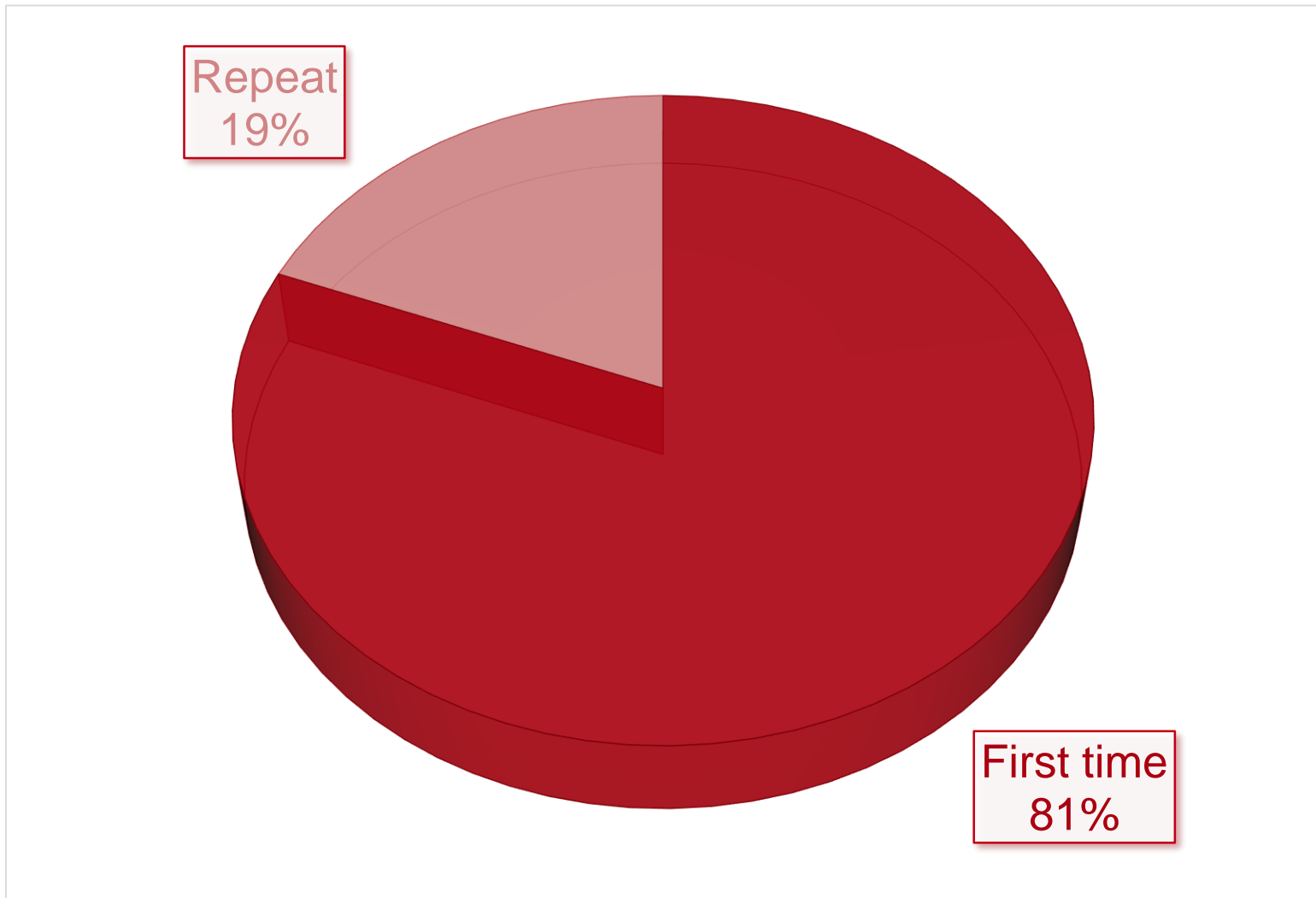




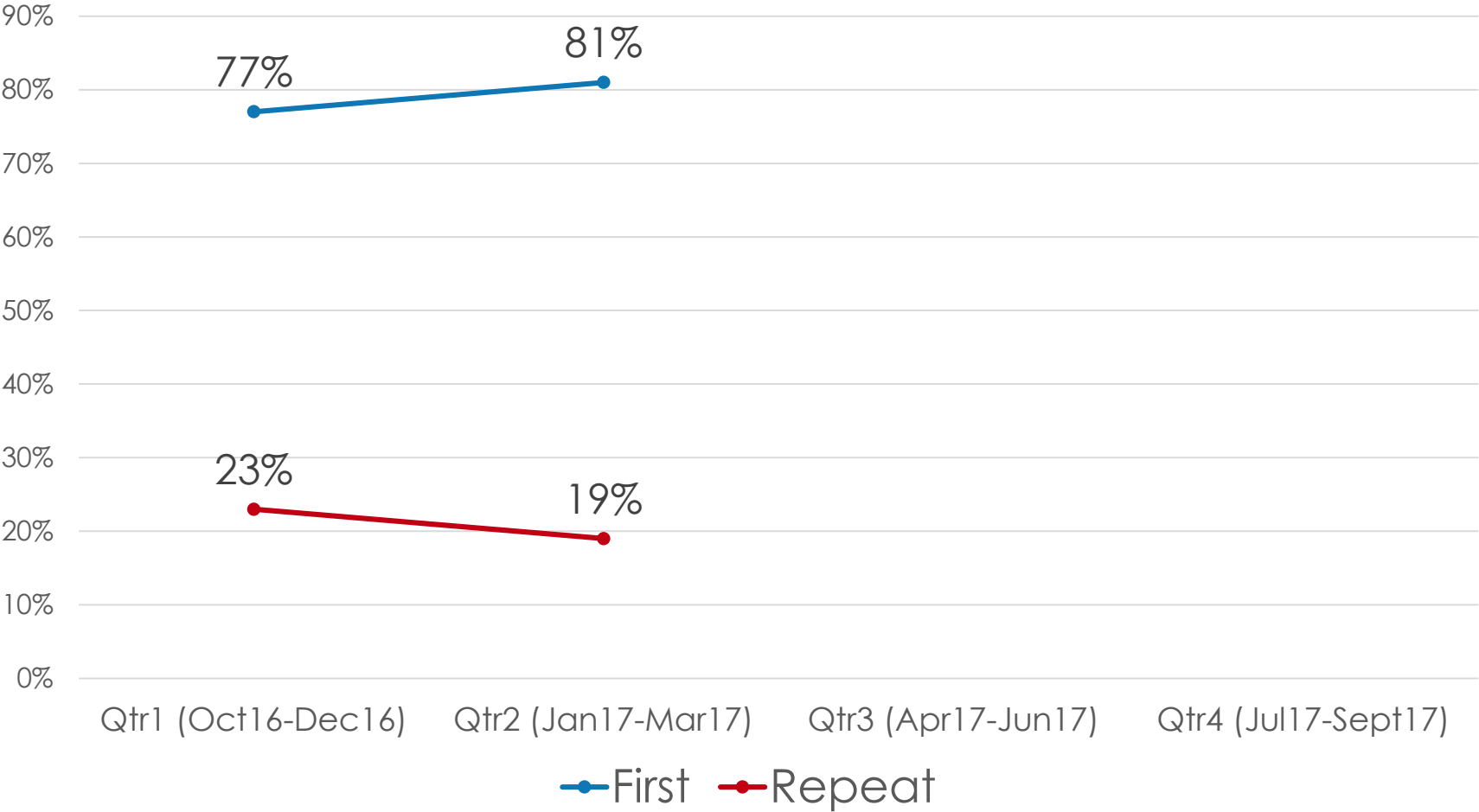
# Travel Party - Children



# Trips to Guam



# Trips to Guam – FY2017 Tracking



# Trips to Guam – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

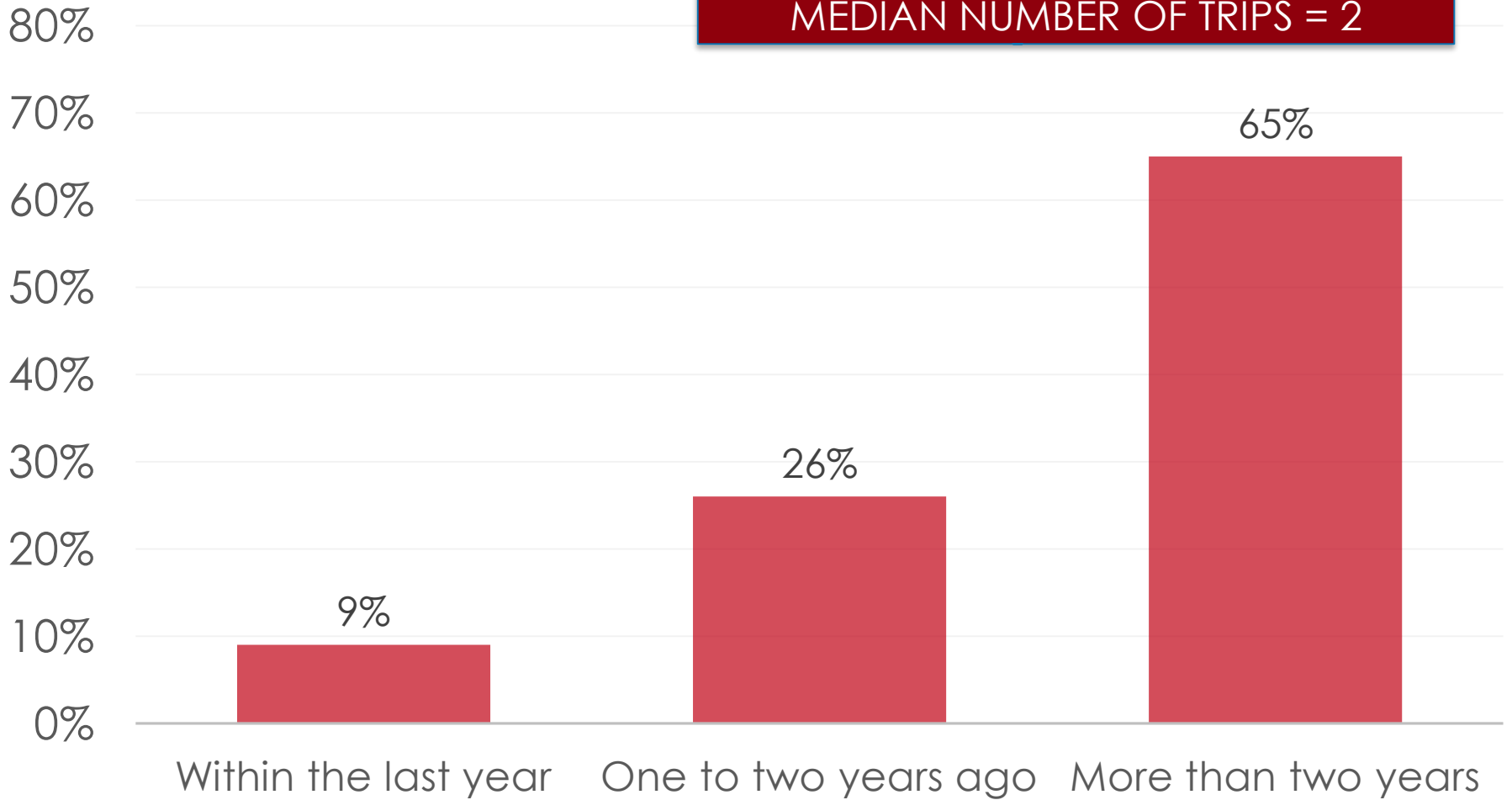
### Q3A Is this your first trip to Guam?

|     |       | TOTAL | MICE | SPORTS/<br>ADVENTURE | HONEYMOON |
|-----|-------|-------|------|----------------------|-----------|
|     |       | -     | -    | -                    | -         |
| Q3A | Yes   | 81%   | 100% | 88%                  | 100%      |
|     | No    | 19%   |      | 12%                  |           |
|     | Total | 151   | 4    | 82                   | 13        |

Prepared by QMark Research

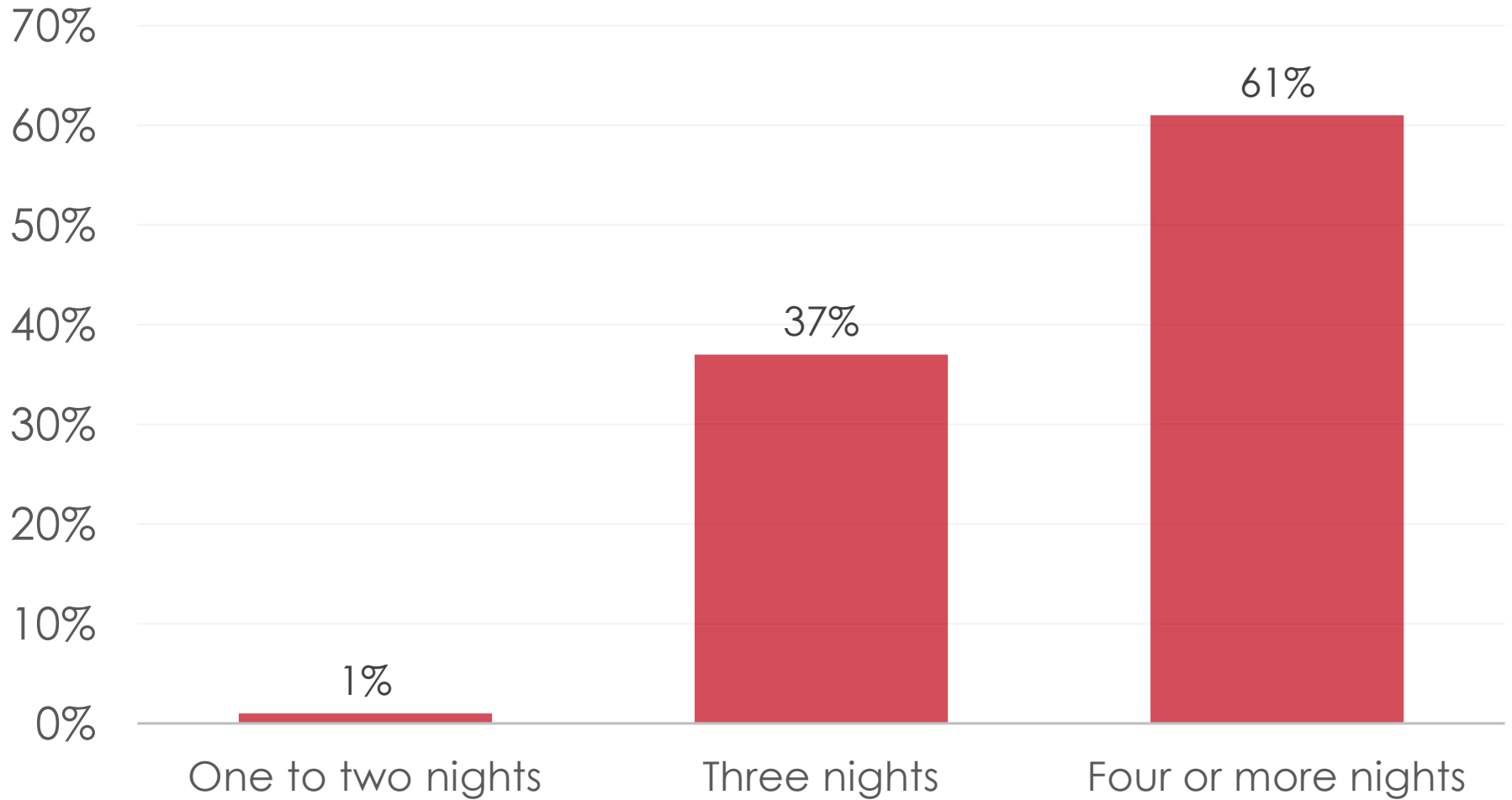
# Repeat Visitor- Most Recent Trip

N = 23  
MEAN NUMBER OF TRIPS = 2.35  
MEDIAN NUMBER OF TRIPS = 2



# Length of Stay

MEAN NUMBER OF NIGHTS = 4.05  
MEDIAN NUMBER OF NIGHTS = 4



# Length of Stay – FY2017 Tracking



|        | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN   | 3.95               | 4.05               |                    |                     |
| MEDIAN | 4                  | 4                  |                    |                     |

# Length of Stay – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

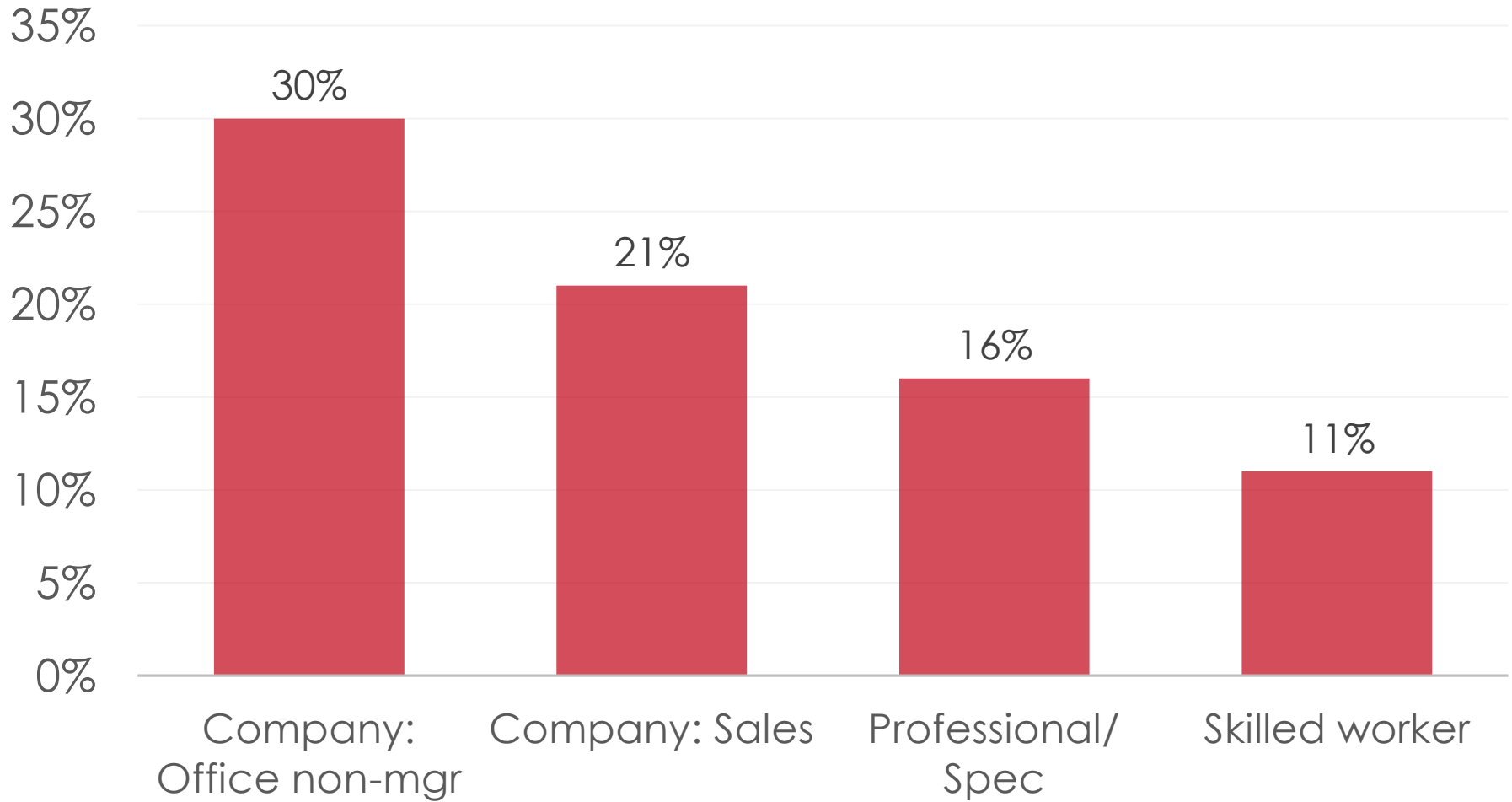
### Q8 How many nights did you stay on Guam?

|    |        | TOTAL | MICE | SPORTS/<br>ADVENTURE | HONEYMOON |
|----|--------|-------|------|----------------------|-----------|
|    |        | -     | -    | -                    | -         |
| Q8 | 1-2    | 1%    |      | 1%                   |           |
|    | 3      | 37%   |      | 33%                  | 31%       |
|    | 4+     | 61%   | 100% | 65%                  | 69%       |
|    | Total  | 150   | 4    | 81                   | 13        |
| Q8 | Mean   | 4.05  | 4.00 | 3.98                 | 4.23      |
|    | Median | 4     | 4    | 4                    | 5         |

Prepared by QMark Research



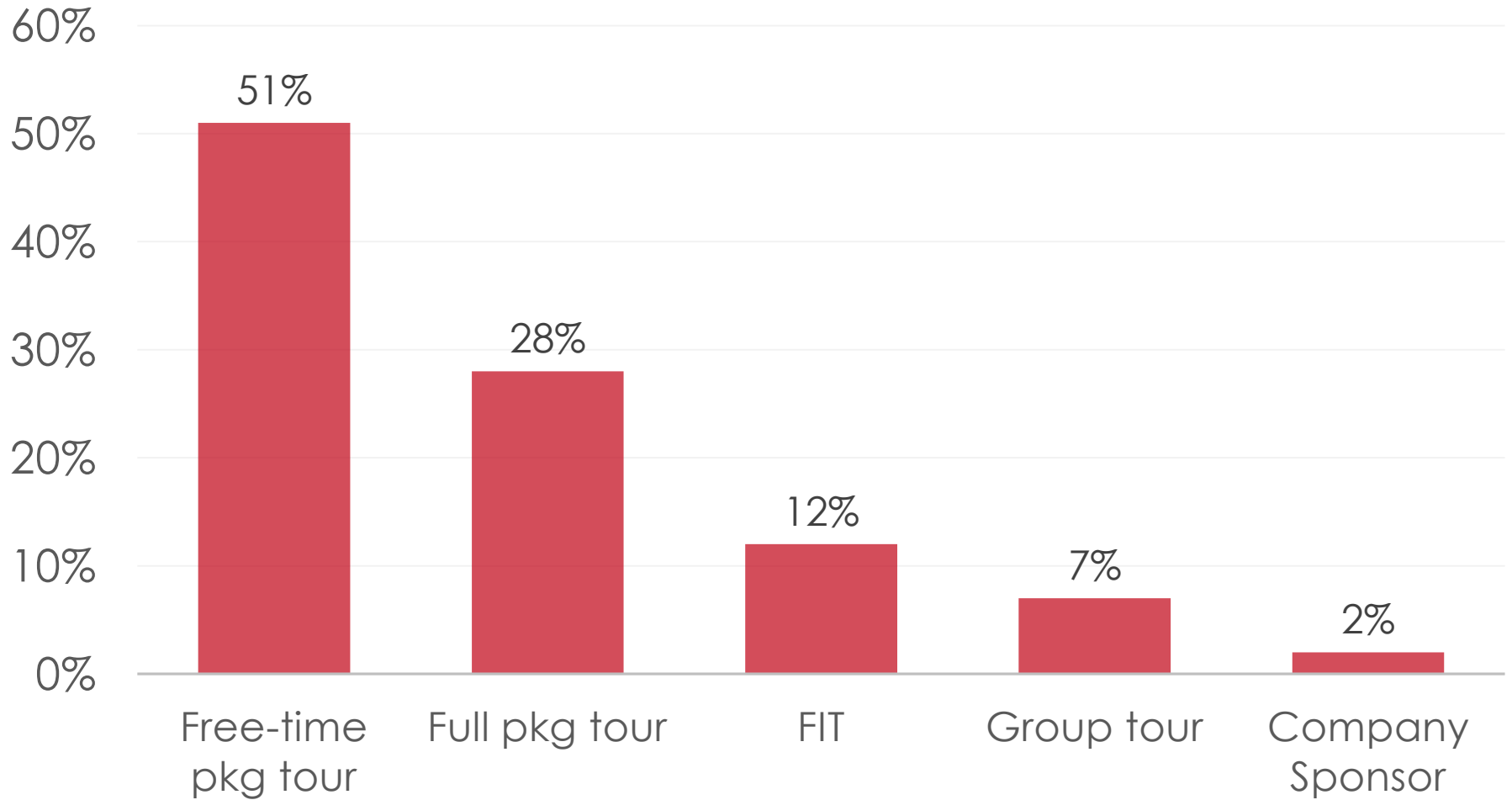
# Occupation – Top Responses (10%+)



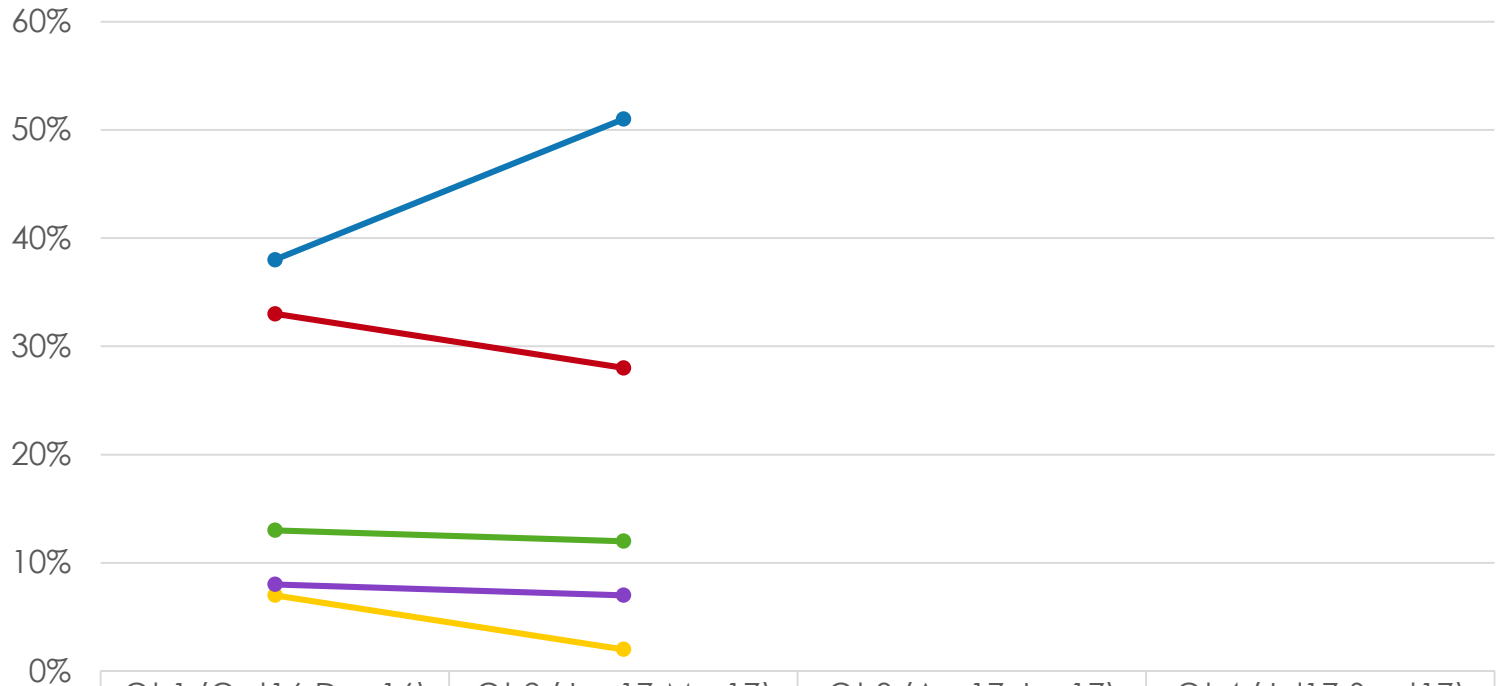
# SECTION 2

# TRAVEL PLANNING

# Travel Planning



# Travel Planning – FY2017 Tracking



|                    | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------------------|--------------------|--------------------|--------------------|---------------------|
| Free-time pkg tour | 38%                | 51%                |                    |                     |
| Full pkg tour      | 33%                | 28%                |                    |                     |
| FIT                | 13%                | 12%                |                    |                     |
| Company            | 7%                 | 2%                 |                    |                     |
| Group              | 8%                 | 7%                 |                    |                     |

# Travel Planning – Key Segments

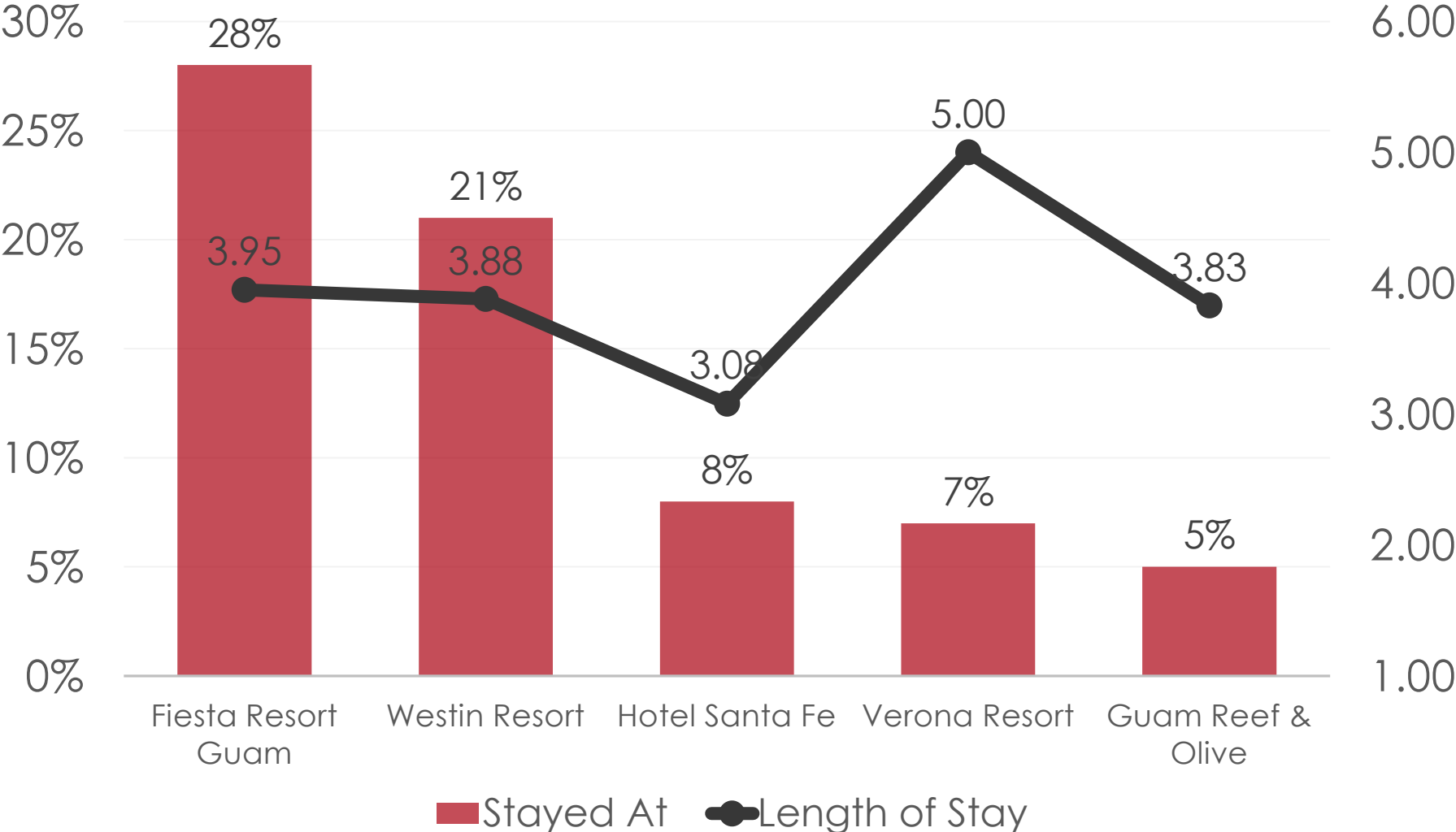
## GUAM VISITORS BUREAU - EXIT SURVEY

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

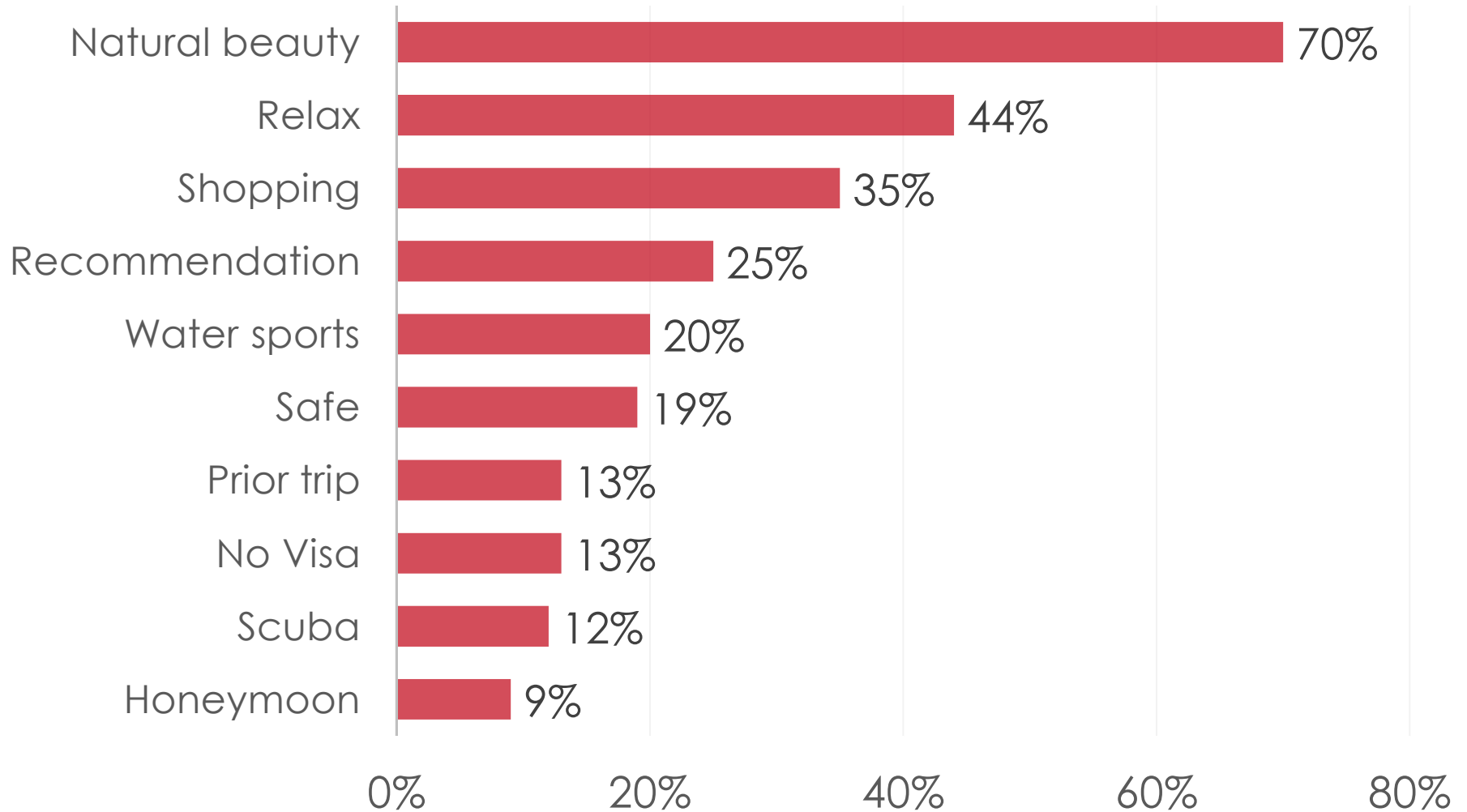
|    |                                    | TOTAL | MICE | SPORTS/<br>ADVENTURE | HONEYMOON |
|----|------------------------------------|-------|------|----------------------|-----------|
|    |                                    | -     | -    | -                    | -         |
| Q7 | Free-time package tour             | 51%   |      | 54%                  | 42%       |
|    | Full package tour                  | 28%   | 75%  | 28%                  | 58%       |
|    | Individually arranged travel (FIT) | 12%   |      | 9%                   |           |
|    | Group tour                         | 7%    |      | 5%                   |           |
|    | Company paid travel                | 2%    | 25%  | 4%                   |           |
|    | Total                              | 150   | 4    | 81                   | 12        |

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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 | MICE | SPORTS/<br>ADVENTURE | HONEYMOON |
|-----|------------------------------------|-------|------|----------------------|-----------|
|     |                                    | -     | -    | -                    | -         |
| Q5A | Natural beauty                     | 70%   | 50%  | 68%                  | 69%       |
|     | Relax                              | 44%   | 25%  | 38%                  | 77%       |
|     | Shopping                           | 35%   | 25%  | 29%                  | 31%       |
|     | Recomm-<br>friend/family/trvl agnt | 25%   |      | 24%                  | 8%        |
|     | Water sports                       | 20%   | 25%  | 37%                  | 8%        |
|     | Safe                               | 19%   | 25%  | 17%                  | 15%       |
|     | No Visa requirement                | 13%   |      | 9%                   | 8%        |
|     | Previous trip                      | 13%   |      | 9%                   |           |
|     | Scuba                              | 12%   |      | 22%                  |           |
|     | Honeymoon                          | 9%    |      | 9%                   | 100%      |
|     | Price                              | 9%    |      | 6%                   | 8%        |
|     | Pleasure                           | 8%    | 25%  | 11%                  |           |
|     | Company/ Business Trip             | 8%    | 50%  | 7%                   |           |
|     | Short travel time                  | 5%    |      | 6%                   |           |
|     | Other                              | 4%    |      | 5%                   |           |
|     | Convention/ Trade/<br>Conference   | 1%    | 50%  | 1%                   |           |
|     | Company Sponsored                  | 1%    | 50%  | 2%                   |           |
|     | Organized sports                   | 1%    |      | 1%                   |           |
|     | Career Cert/ Testing               | 1%    |      |                      |           |
|     | Golf                               | 1%    |      | 1%                   |           |
|     | Visit friends/ Relatives           | 1%    |      | 1%                   |           |
|     | Total                              | 150   | 4    | 82                   | 13        |

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[A]



# SECTION 3

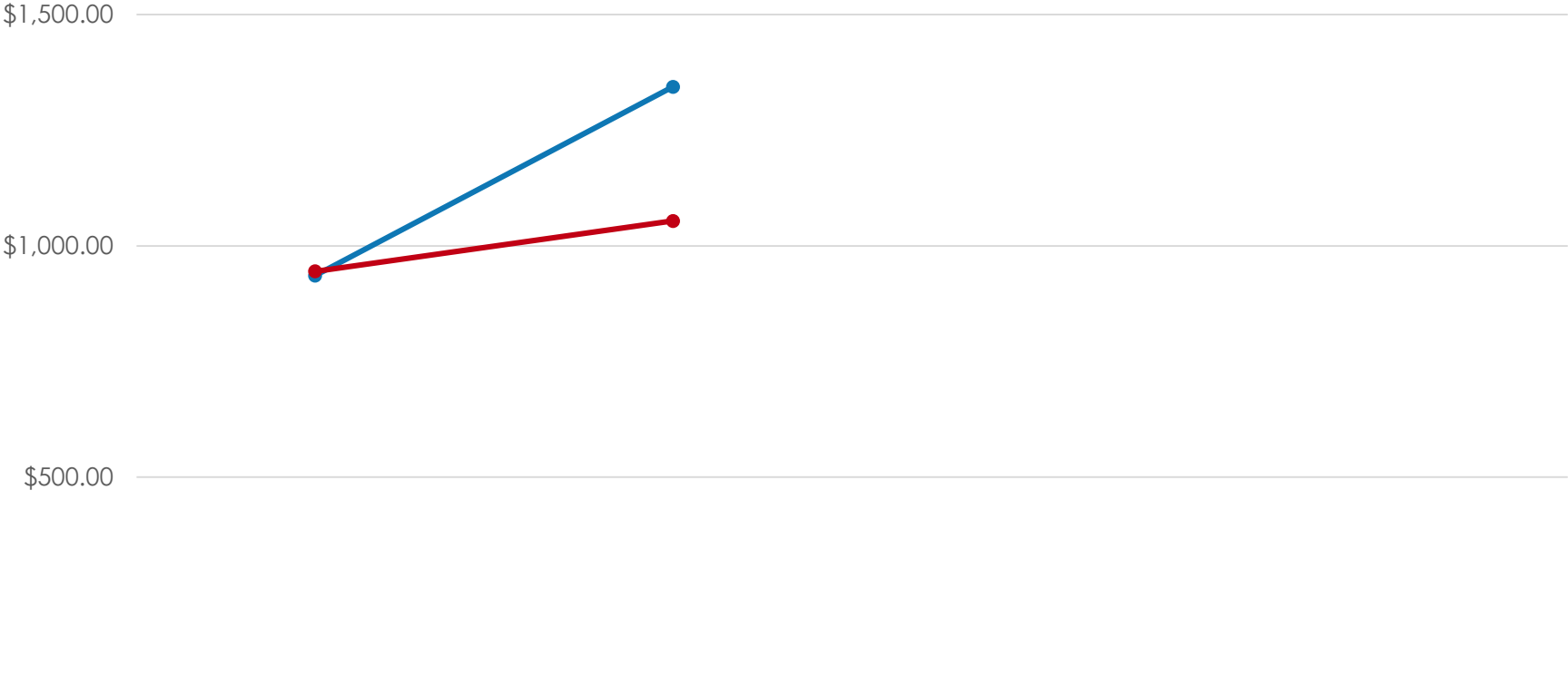
# EXPENDITURES

# Prepaid Expenditures

EXCHANGE RATE NT30.37=\$1

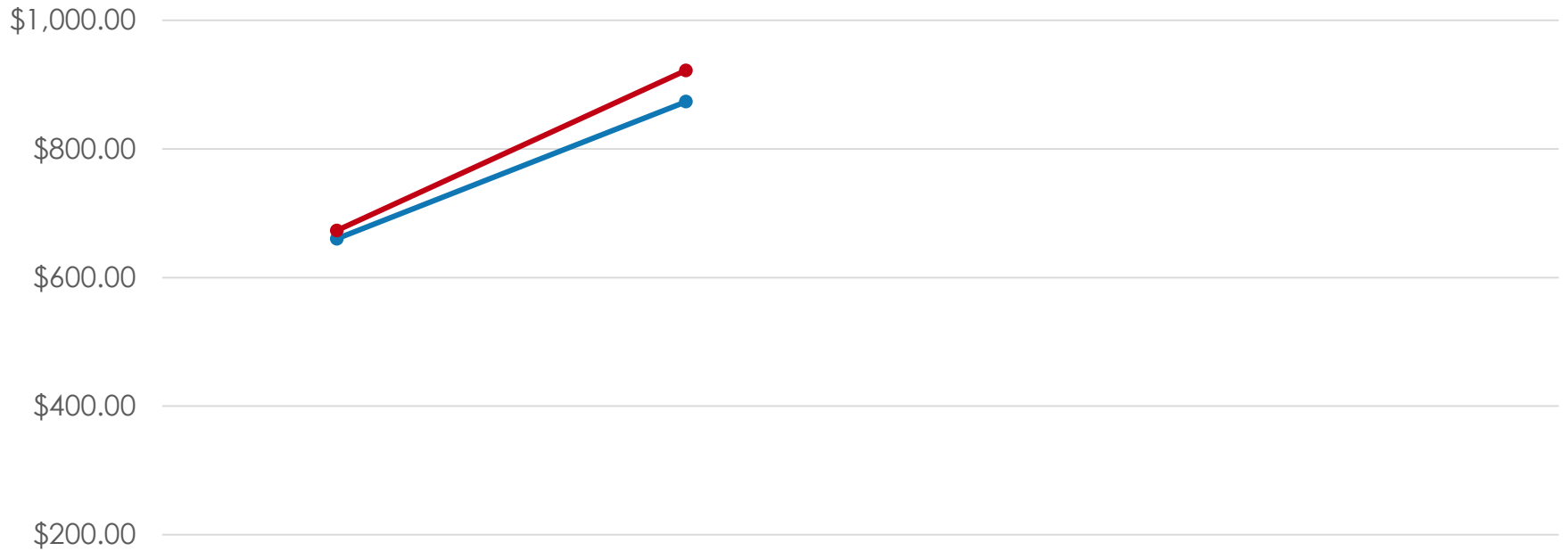
- \$1,343.70 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$873.41 = overall mean average per person prepaid expenditures

# Prepaid Entire Travel Party – FY2017 Tracking



|          | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|----------|--------------------|--------------------|--------------------|---------------------|
| ● MEAN   | \$935.76           | \$1,343.70         |                    |                     |
| ● MEDIAN | \$945.00           | \$1,054.00         |                    |                     |

# Prepaid Per Person– FY2017 Tracking



|          | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|----------|--------------------|--------------------|--------------------|---------------------|
| ● MEAN   | \$660.28           | \$873.41           |                    |                     |
| ● MEDIAN | \$673.00           | \$922.00           |                    |                     |

# Prepaid Per Person– Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

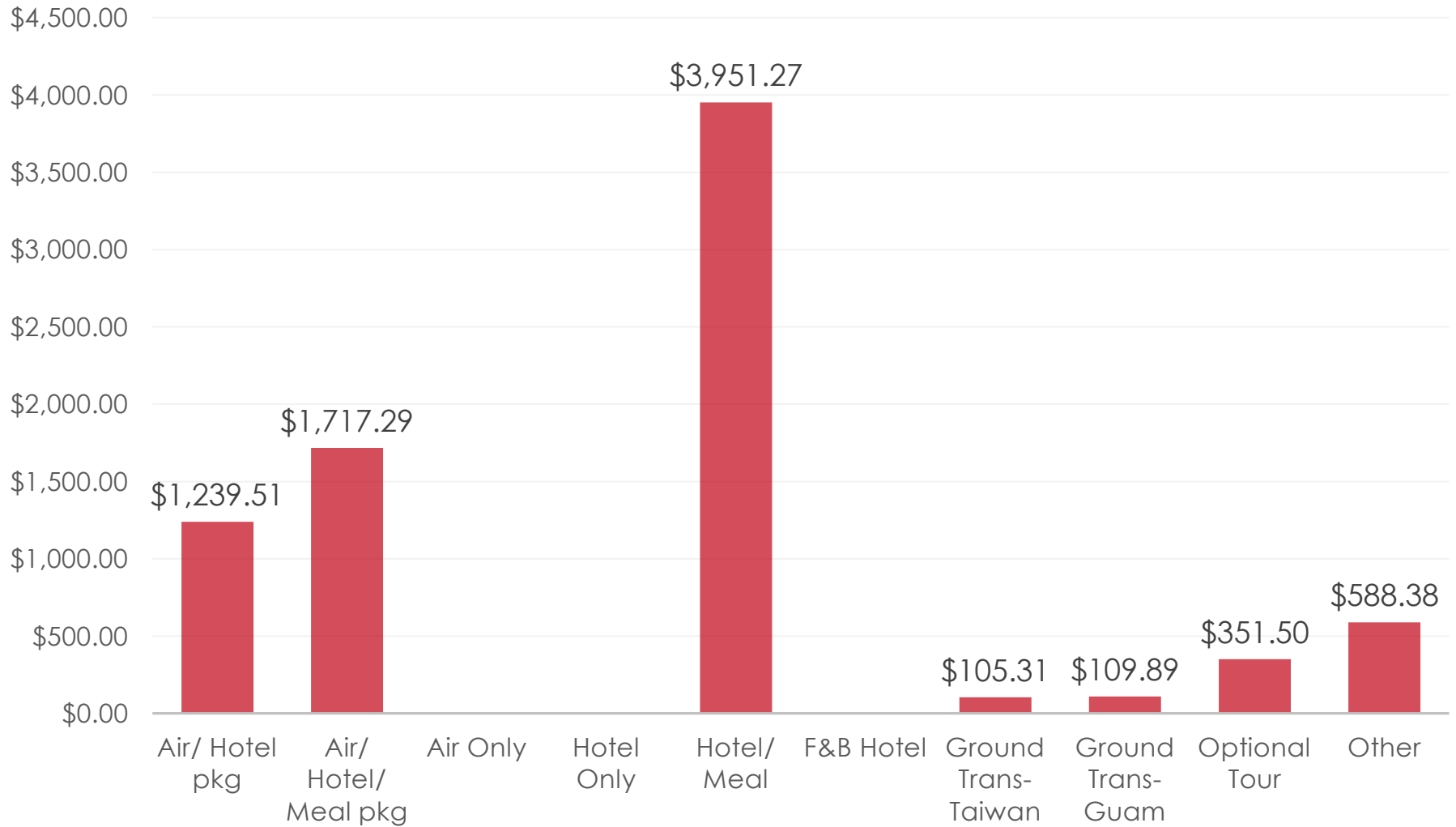
**Q10A How much did you pay in Taiwan before coming to Guam for the tour package, your airfare, lodging meals, and transportation?**

### PER PERSON

|       |        | TOTAL    | MICE     | SPORTS/<br>ADVENTURE | HONEYMOON  |
|-------|--------|----------|----------|----------------------|------------|
|       |        | -        | -        | -                    | -          |
| TWD\$ | Mean   | \$873.41 | \$442.05 | \$825.58             | \$1,001.33 |
|       | Median | \$922    | \$395    | \$807                | \$1,021    |

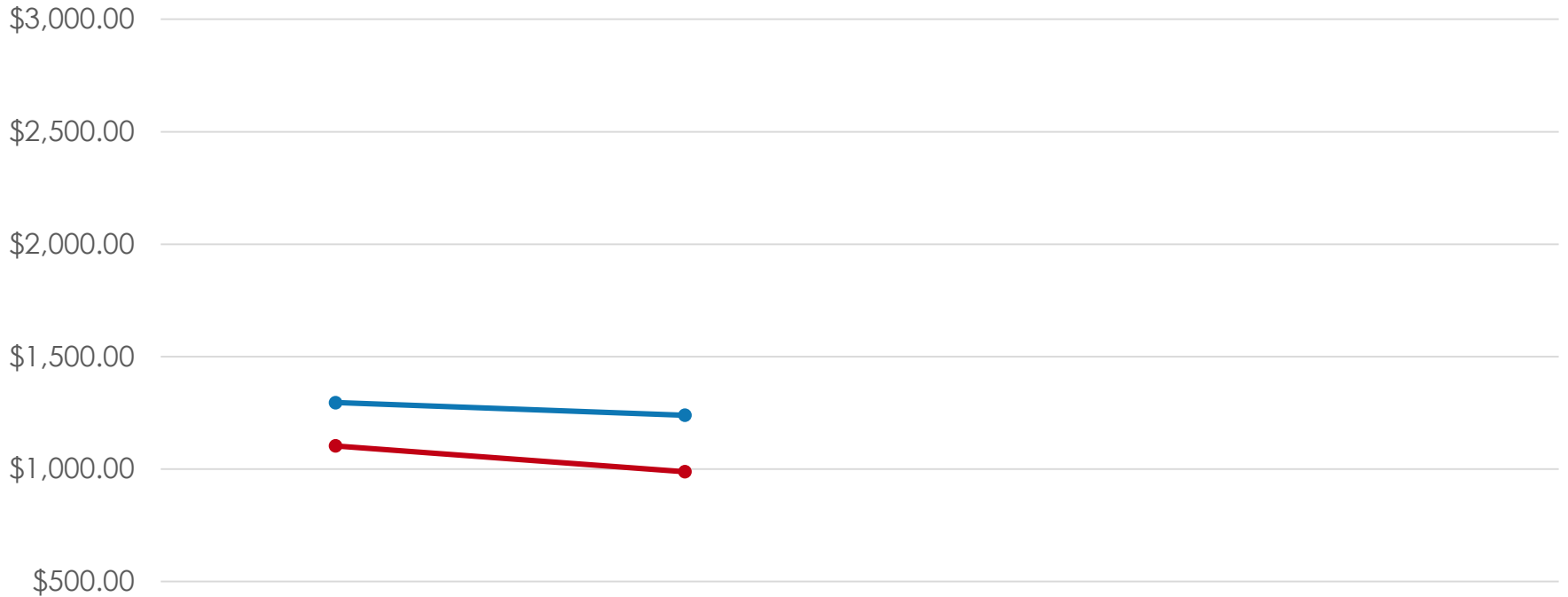
Prepared by QMark Research

# Prepaid Expenses by Category – MEAN Entire Travel Party



# Prepaid- FY2017 Tracking

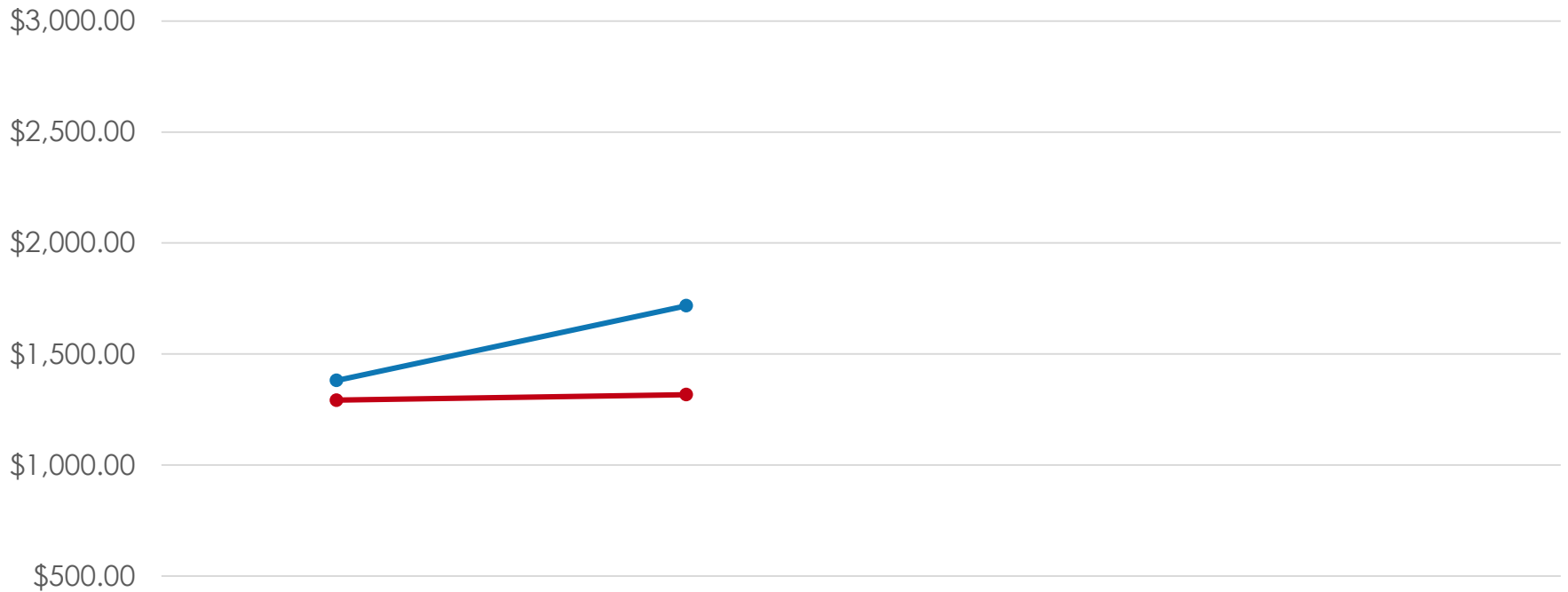
## Airfare & Accommodation Packages



|        | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN   | \$1,295.71         | \$1,239.51         |                    |                     |
| MEDIAN | \$1,103.00         | \$988.00           |                    |                     |

# Prepaid- FY2017 Tracking

## Airfare & Accommodation W/ Meal Packages

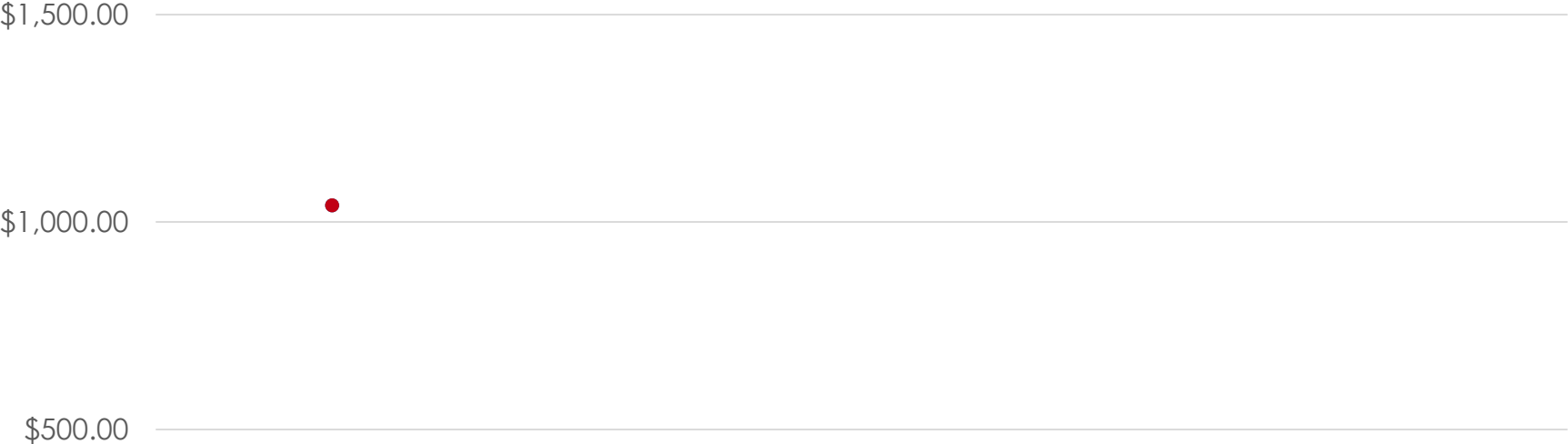


|        | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN   | \$1,381.09         | \$1,717.29         |                    |                     |
| MEDIAN | \$1,292.00         | \$1,317.00         |                    |                     |



# Prepaid- FY2017 Tracking

## Airfare Only



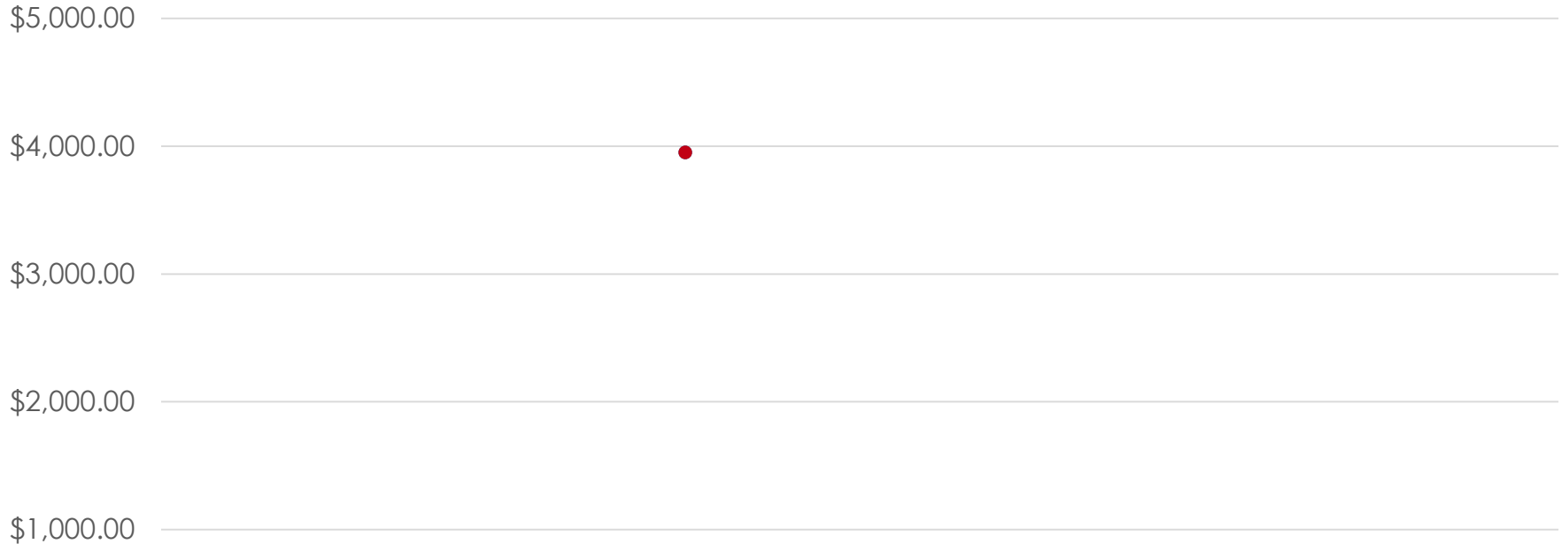
|        | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN   | \$1,040.03         |                    |                    |                     |
| MEDIAN | \$1,040.00         |                    |                    |                     |

# Prepaid- FY2017 Tracking Accommodations Only



|        | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN   | \$472.74           |                    |                    |                     |
| MEDIAN | \$473.00           |                    |                    |                     |

# Prepaid– FY2017 Tracking Accommodations w/ Meal Only



|        | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN   |                    | \$3,951.27         |                    |                     |
| MEDIAN |                    | \$3,951.00         |                    |                     |

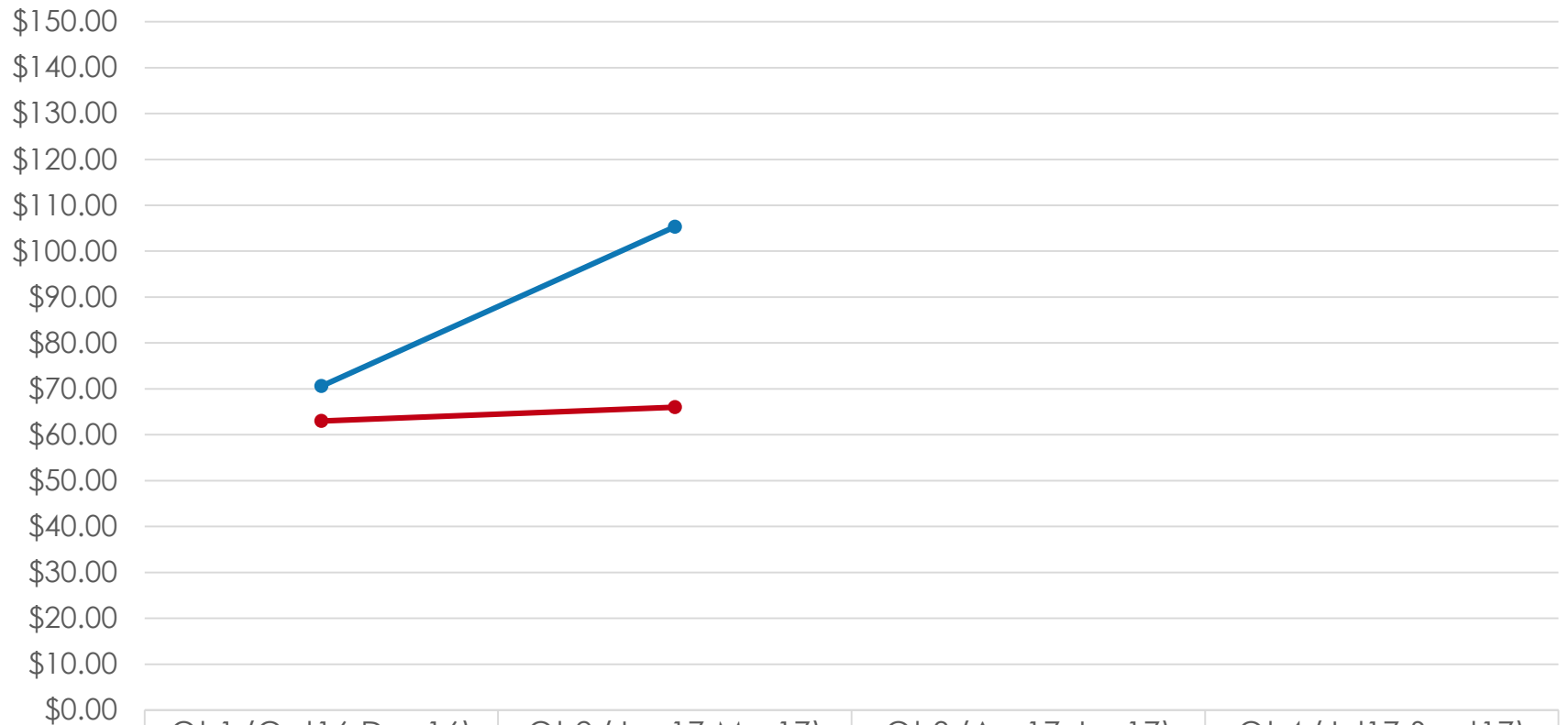
# Prepaid- FY2017 Tracking

## Food & Beverage in Hotel



# Prepaid- FY2017 Tracking

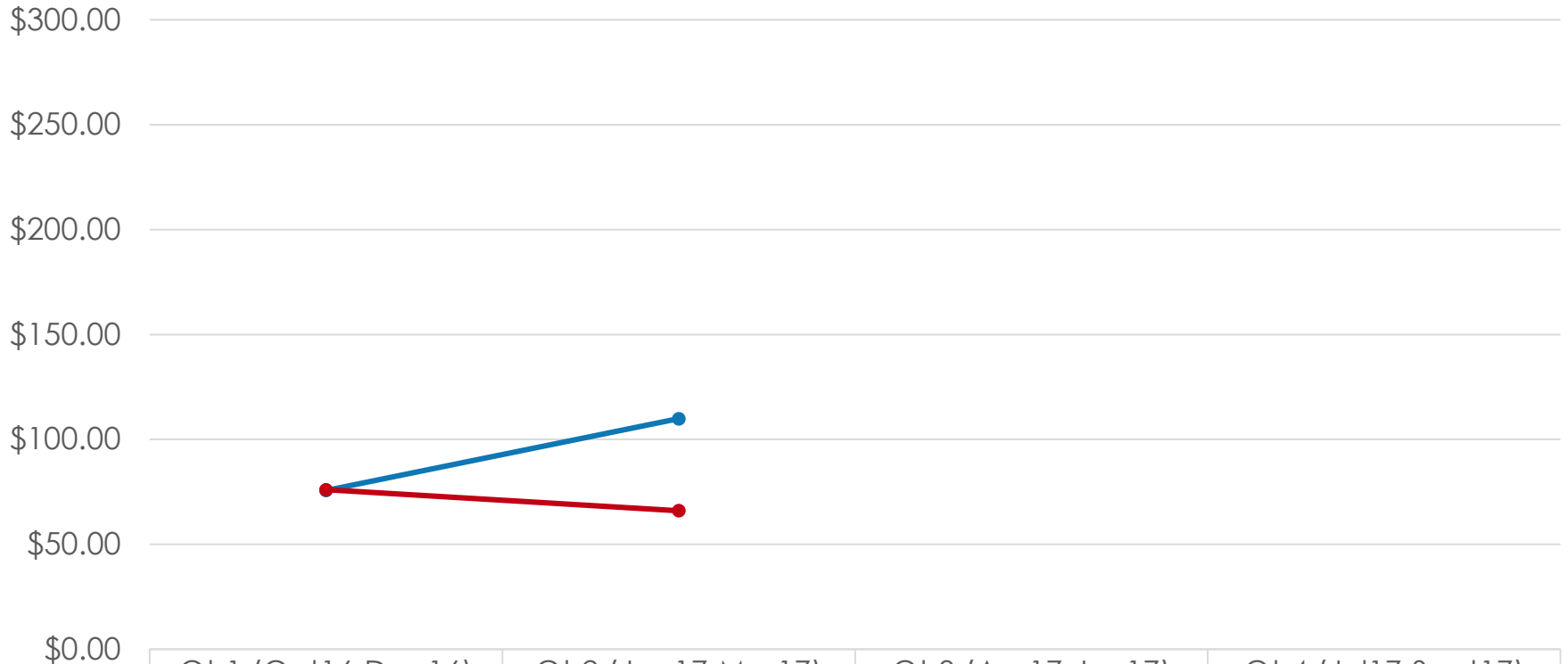
## Ground Transportation - Taiwan



|        | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN   | \$70.60            | \$105.31           |                    |                     |
| MEDIAN | \$63.00            | \$66.00            |                    |                     |

# Prepaid- FY2017 Tracking

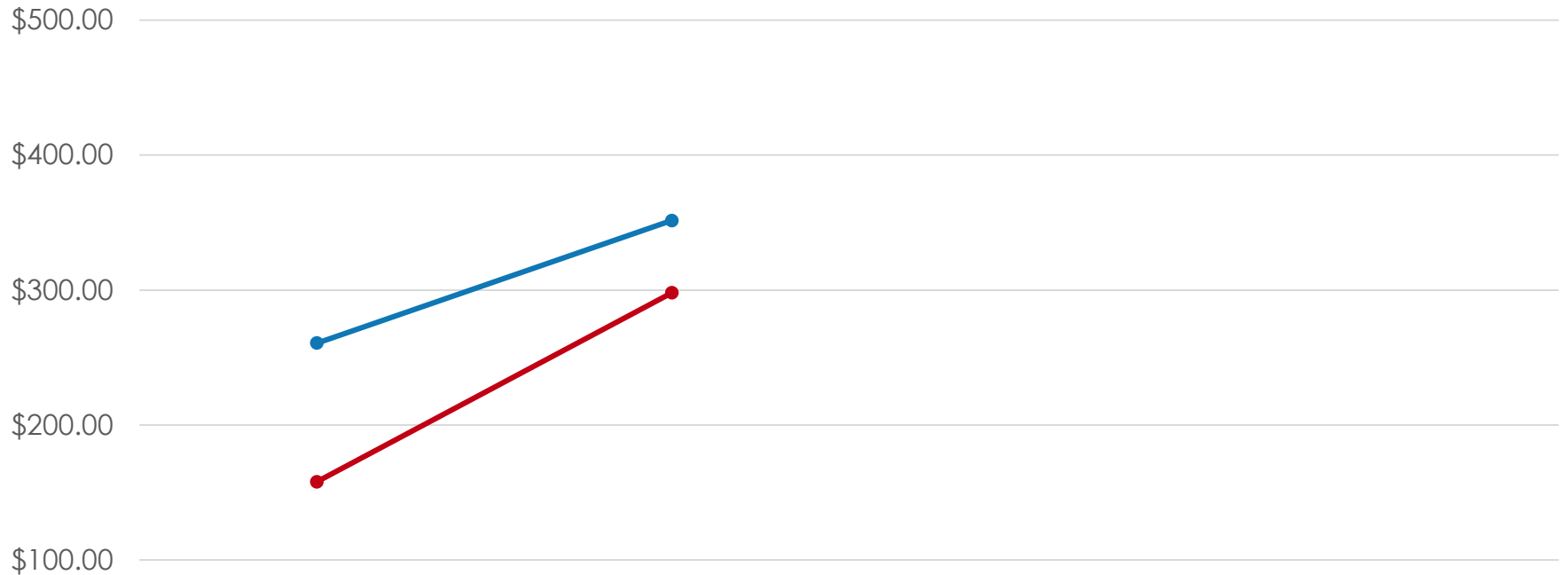
## Ground Transportation - Guam



|        | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN   | \$75.64            | \$109.89           |                    |                     |
| MEDIAN | \$76.00            | \$66.00            |                    |                     |

# Prepaid– FY2017 Tracking

## Optional tours/ Activities



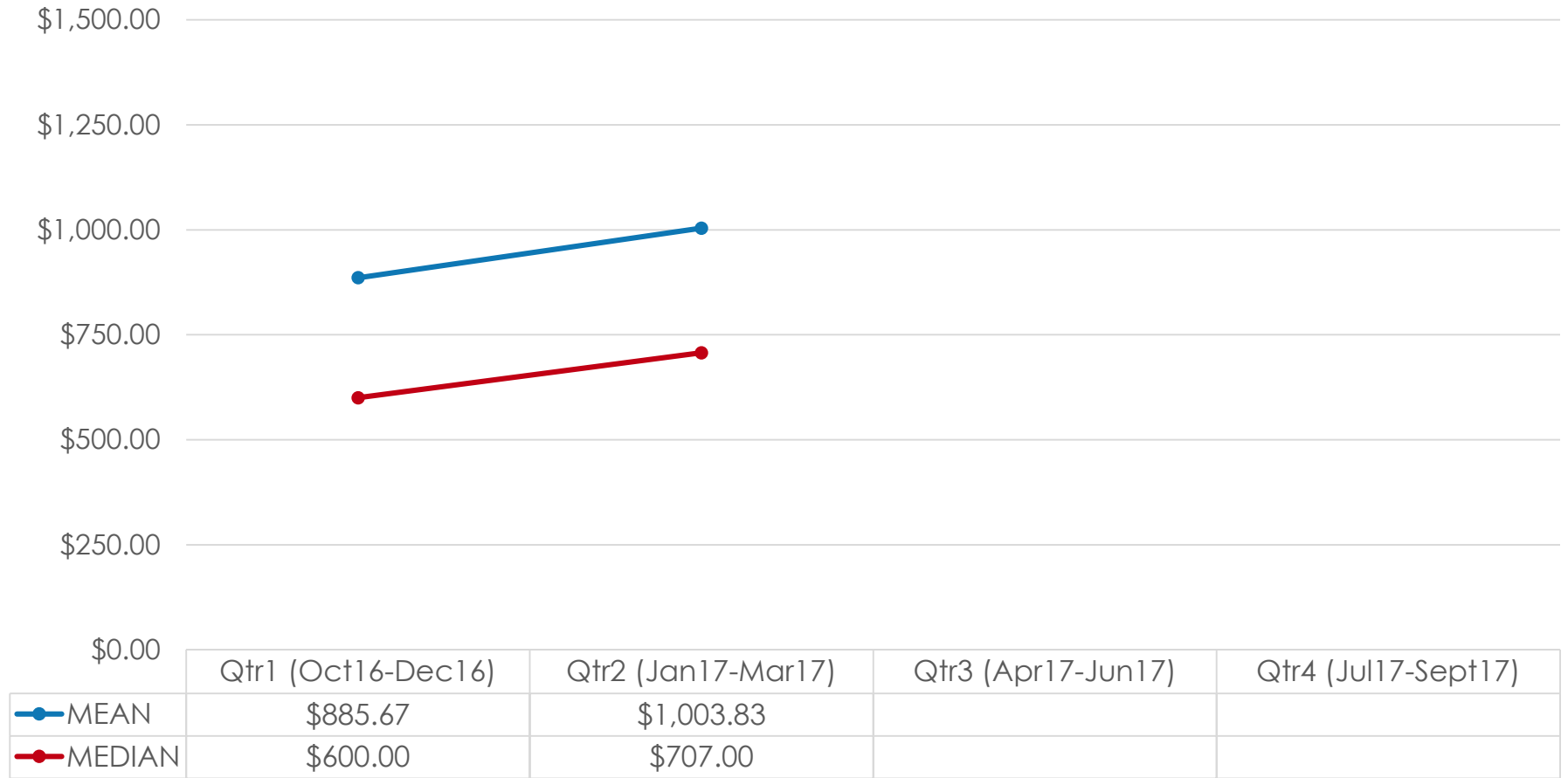
|          | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|----------|--------------------|--------------------|--------------------|---------------------|
| ● MEAN   | \$260.77           | \$351.50           |                    |                     |
| ● MEDIAN | \$158.00           | \$298.00           |                    |                     |

# On-Island Expenditures

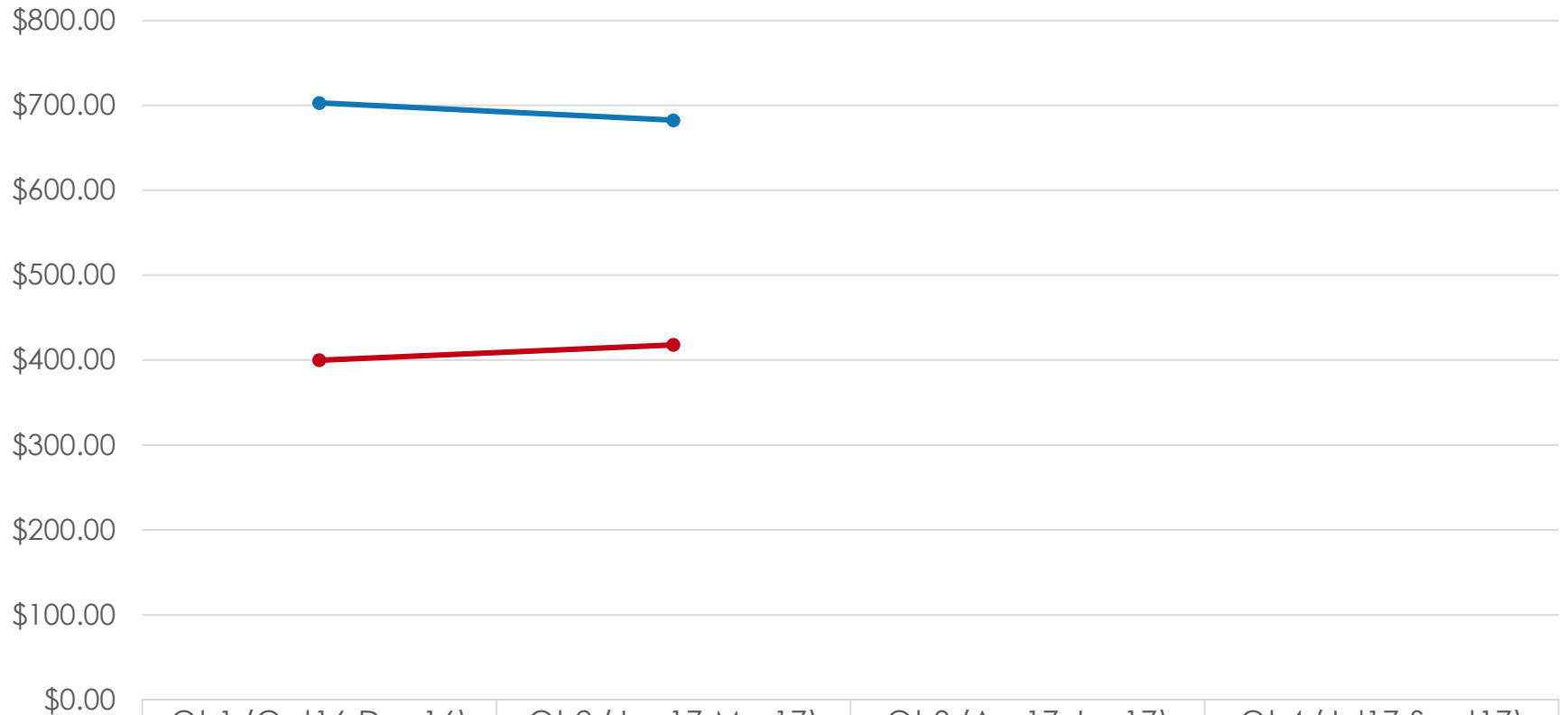
- \$1,003.83 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$682.53 = overall mean average per person prepaid expenditures



# On-Island Entire Travel Party – FY2017 Tracking



# On-Island Per Person – FY2017 Tracking



|        | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN   | \$702.97           | \$682.53           |                    |                     |
| MEDIAN | \$400.00           | \$418.00           |                    |                     |

# On-Island Per Person – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

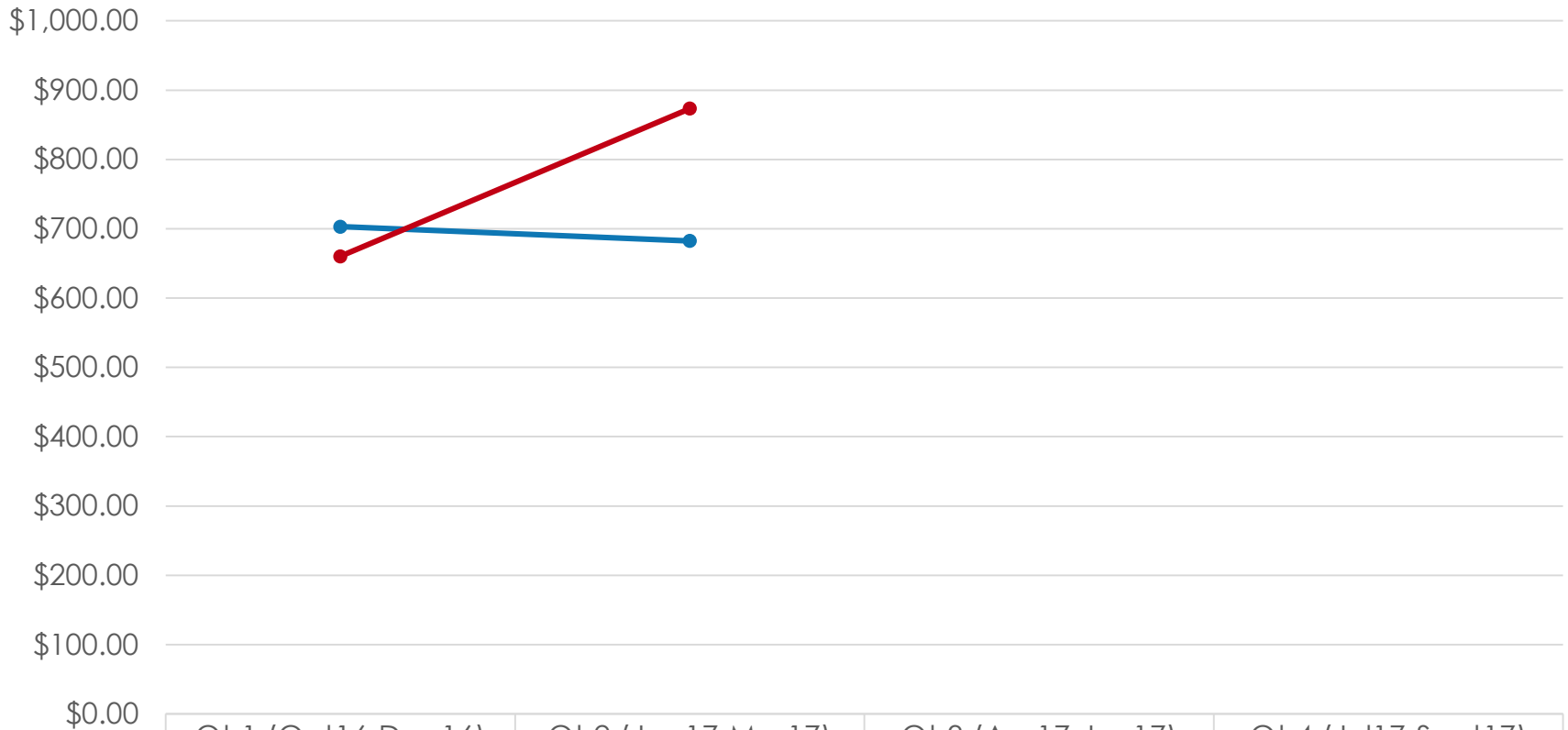
Q11A How much in total did you spend while on Guam during this trip?

### PER PERSON

|        |        | TOTAL    | MICE     | SPORTS/<br>ADVENTURE | HONEYMOON |
|--------|--------|----------|----------|----------------------|-----------|
|        |        | -        | -        | -                    | -         |
| ONISLE | Mean   | \$682.53 | \$808.25 | \$746.20             | \$730.87  |
|        | Median | \$418    | \$792    | \$443                | \$450     |

Prepared by QMark Research

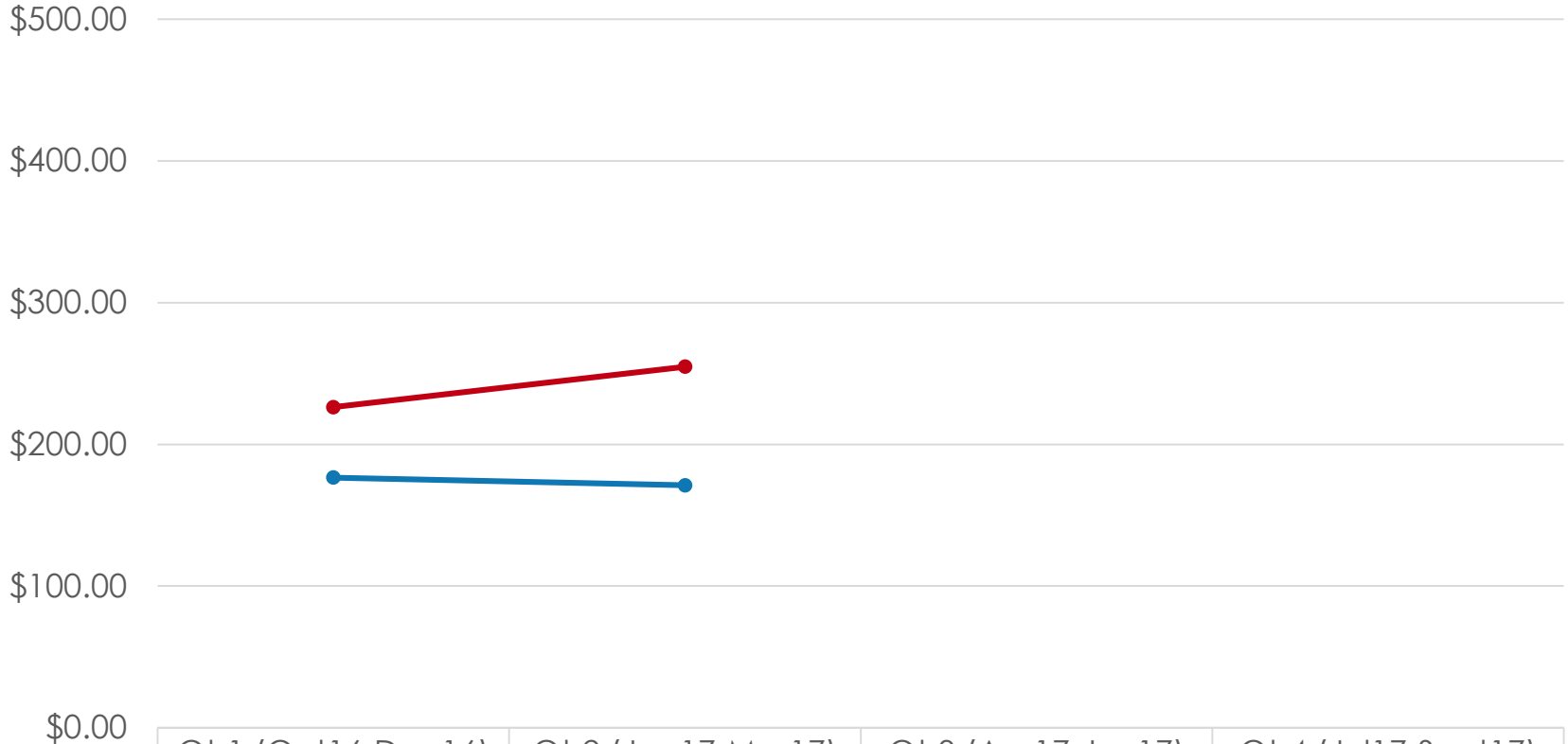
# Per Person MEAN expenditures – FY2017 Tracking On-Island/ Prepaid



|           | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|-----------|--------------------|--------------------|--------------------|---------------------|
| On-Island | \$702.97           | \$682.53           |                    |                     |
| Prepaid   | \$660.28           | \$873.41           |                    |                     |

# On-Island Per Day Spending – FY2017 Tracking

## MEAN



● Per Person  
● Travel Party

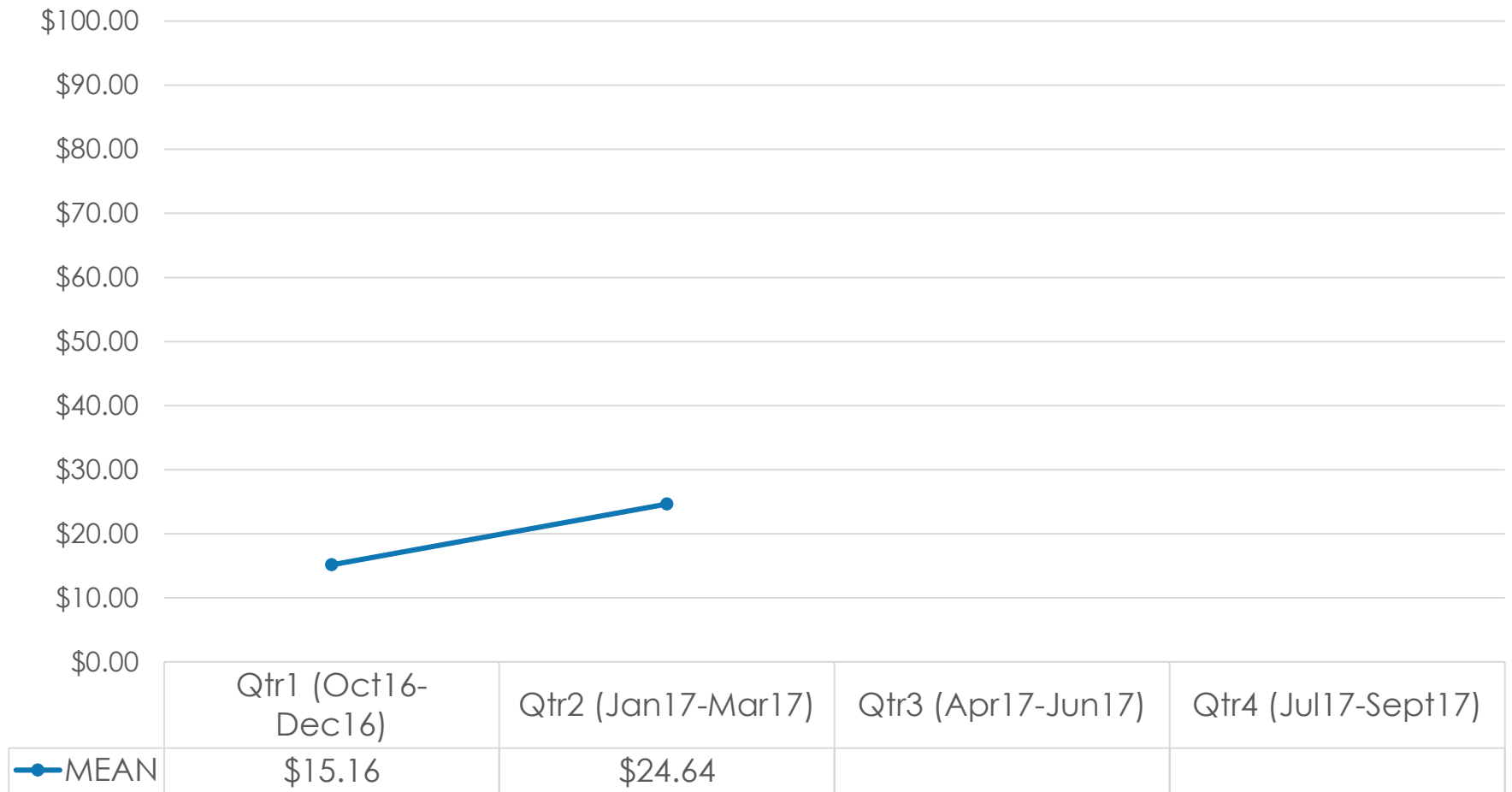
|              | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------------|--------------------|--------------------|--------------------|---------------------|
| Per Person   | \$176.54           | \$171.14           |                    |                     |
| Travel Party | \$226.25           | \$254.75           |                    |                     |

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



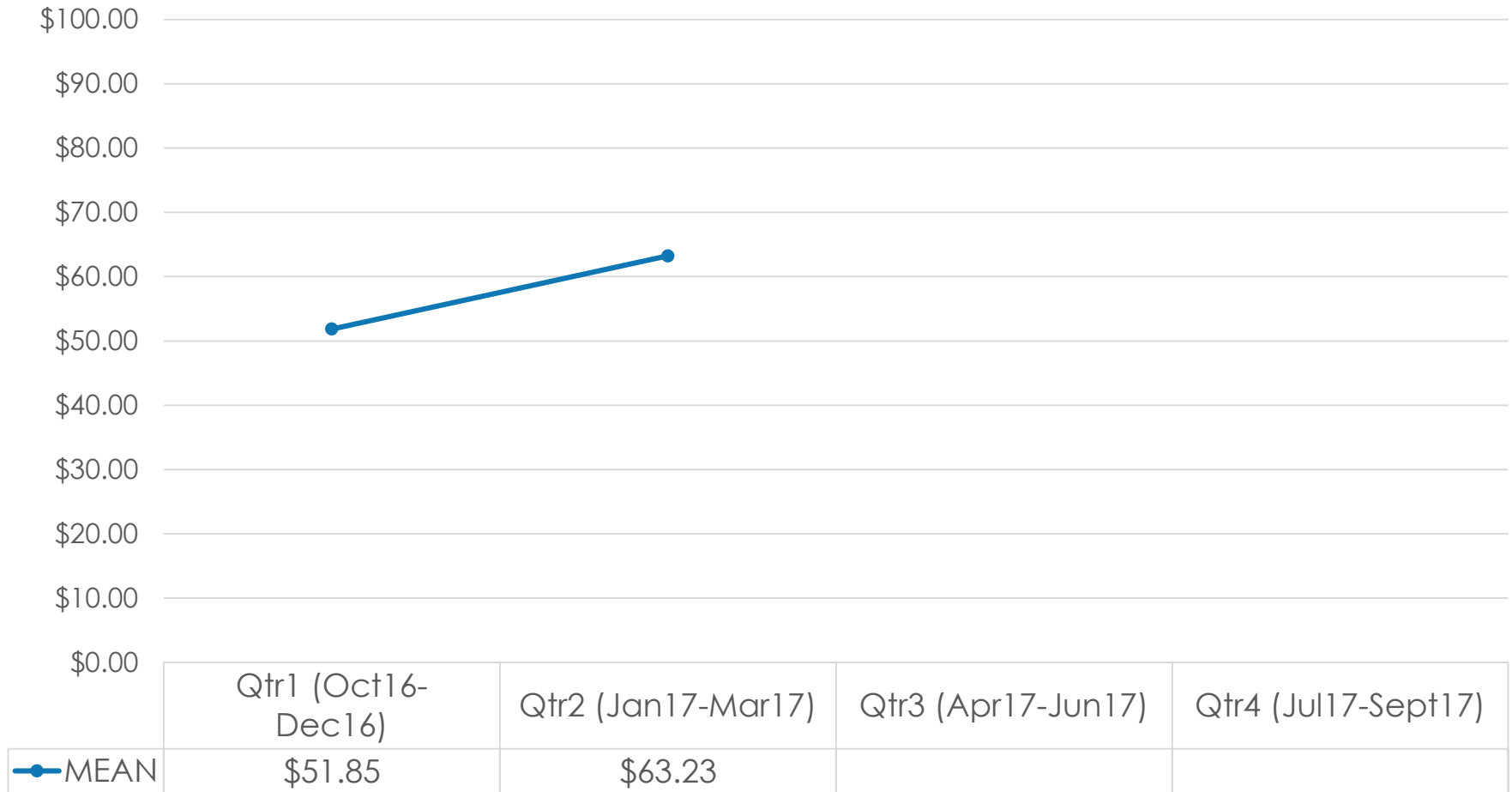
# On-Island – FY2017 Tracking

## Food & Beverage - Hotel



# On-Island – FY2017 Tracking

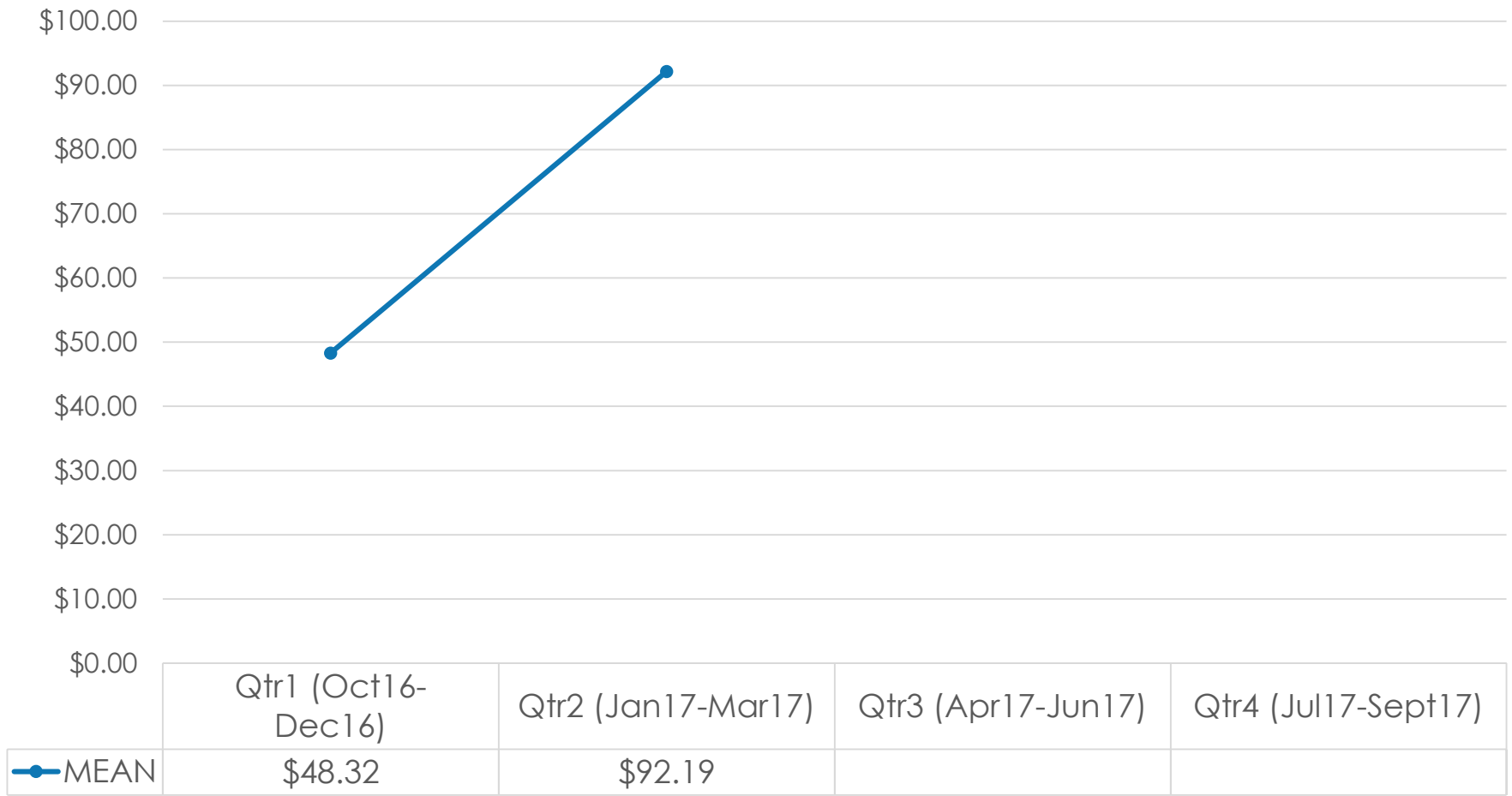
## Food & Beverage – Fast Food/ Convenience Store





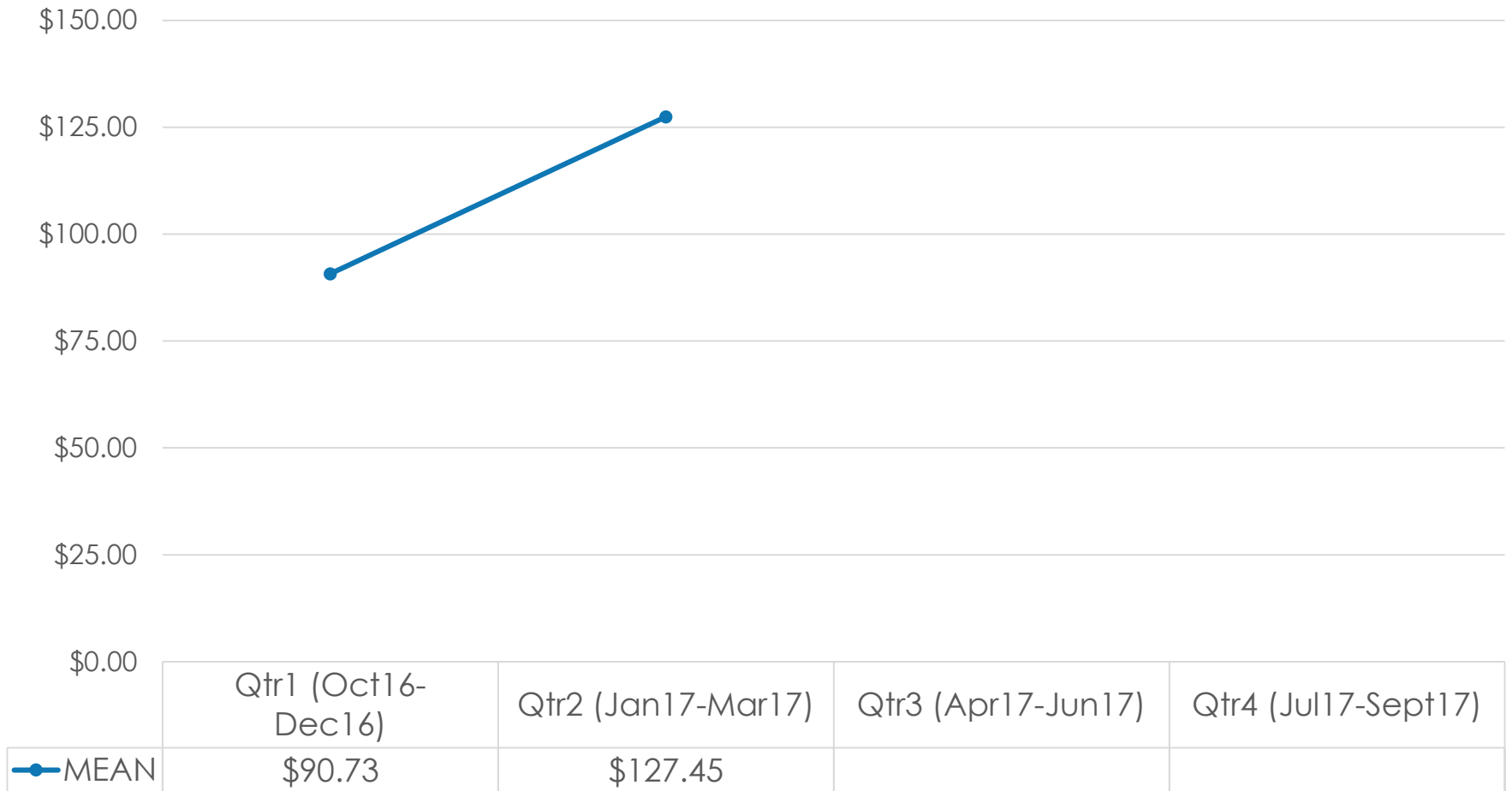
# On-Island – FY2017 Tracking

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



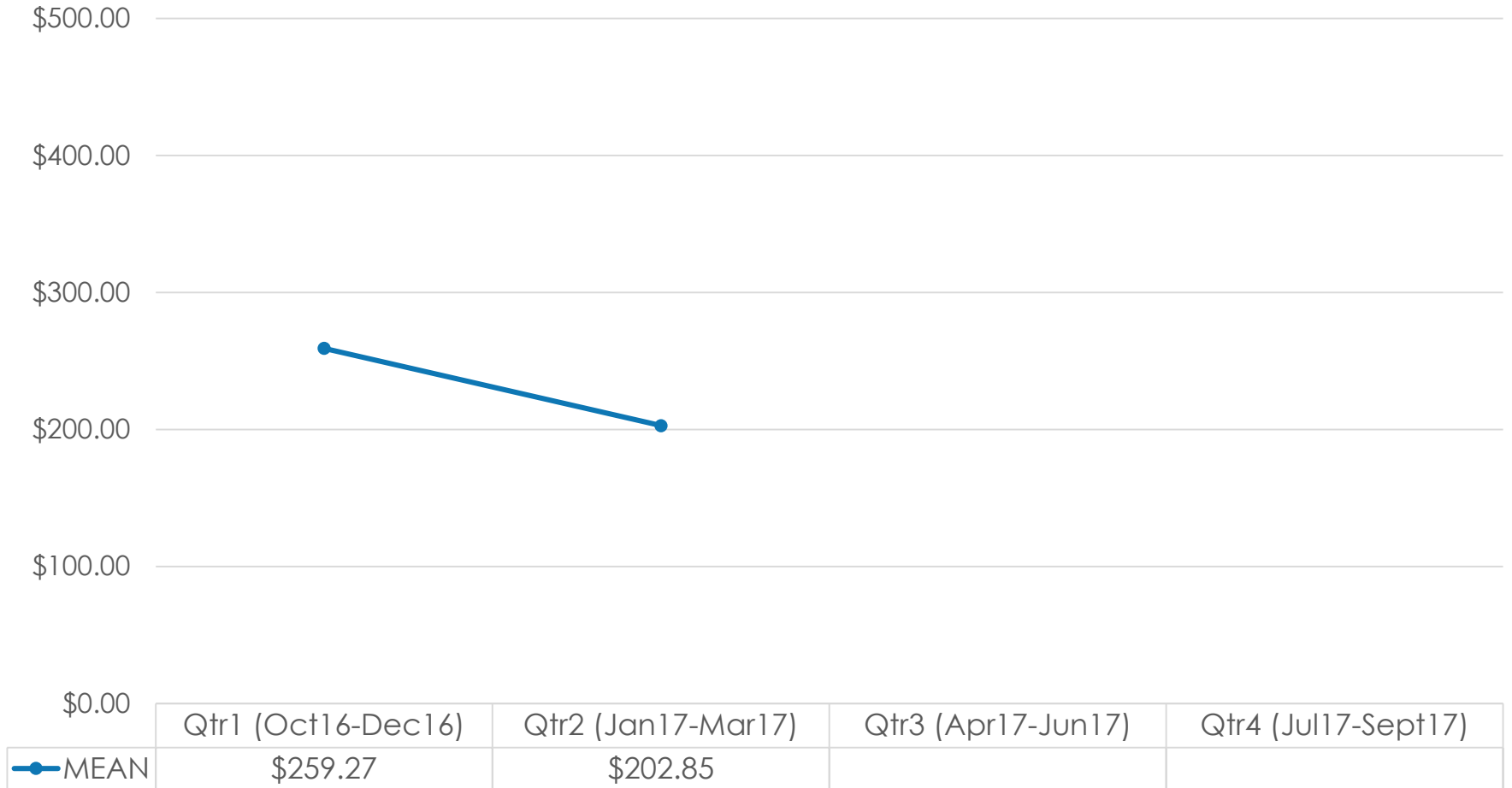
# On-Island – FY2017 Tracking

## Optional tour/ Activities



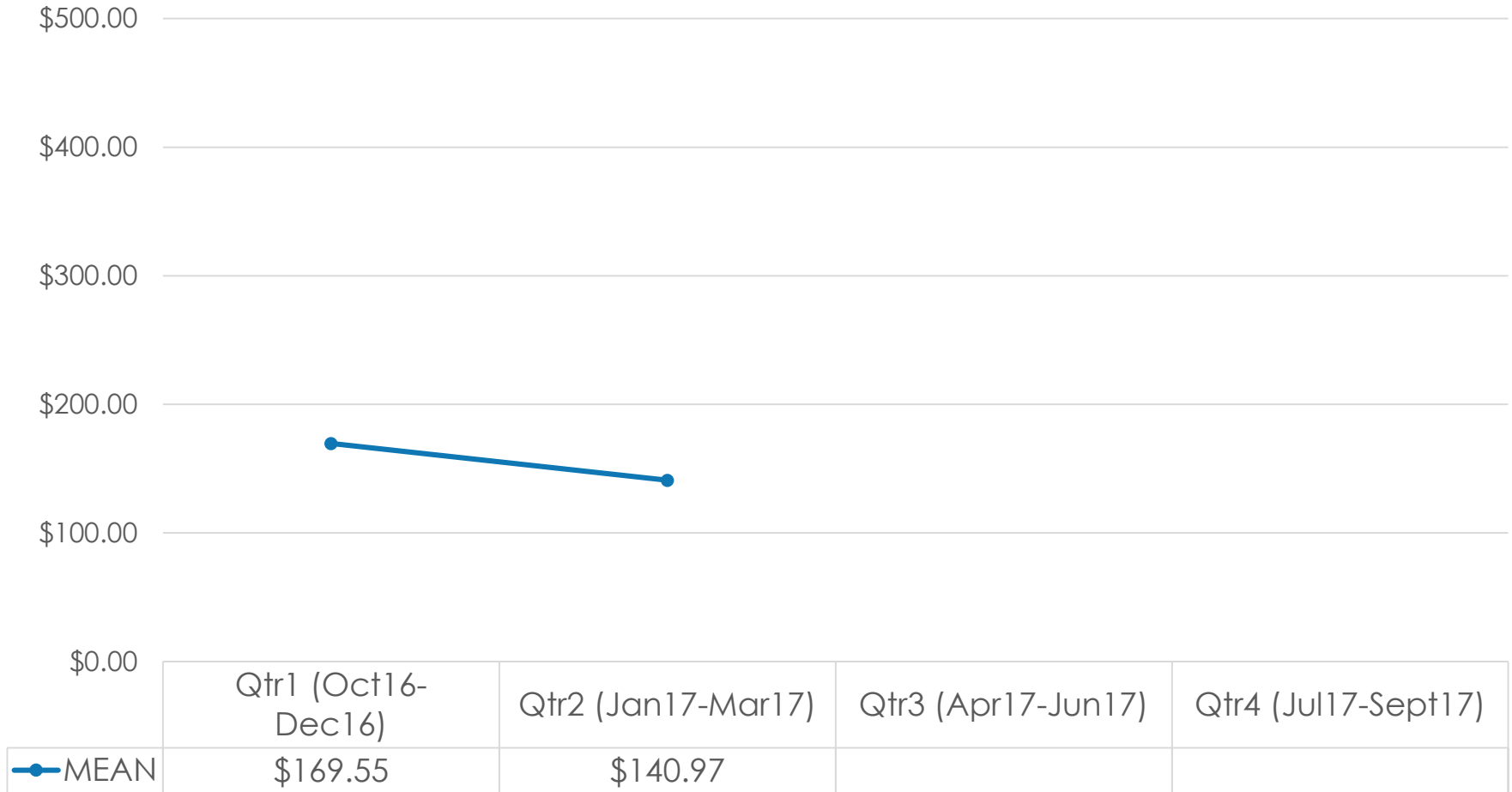
# On-Island – FY2017 Tracking

## Gift/ Souvenir – Self/ Companion



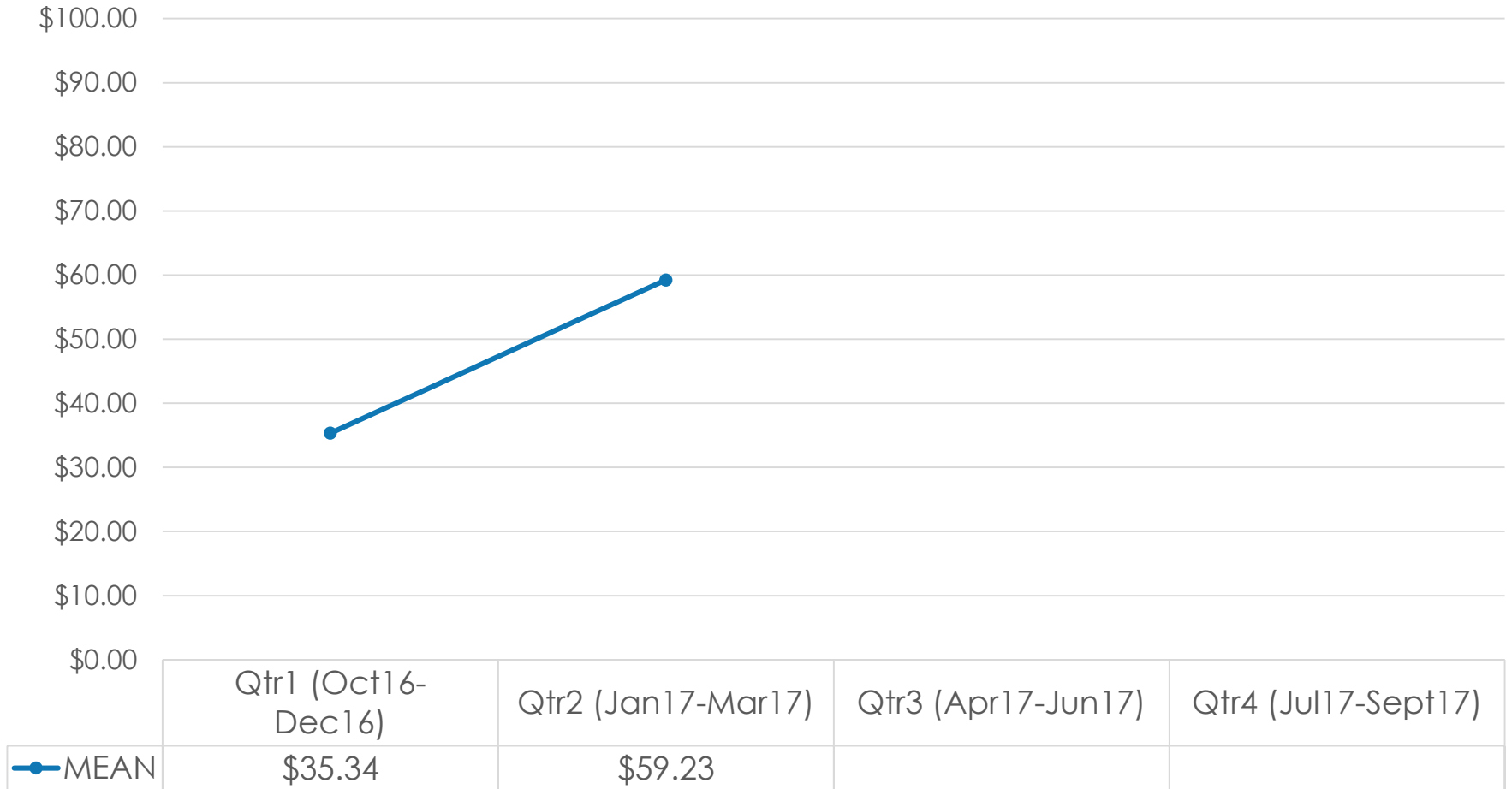
# On-Island – FY2017 Tracking

## Gift/ Souvenir – Friends/ Family



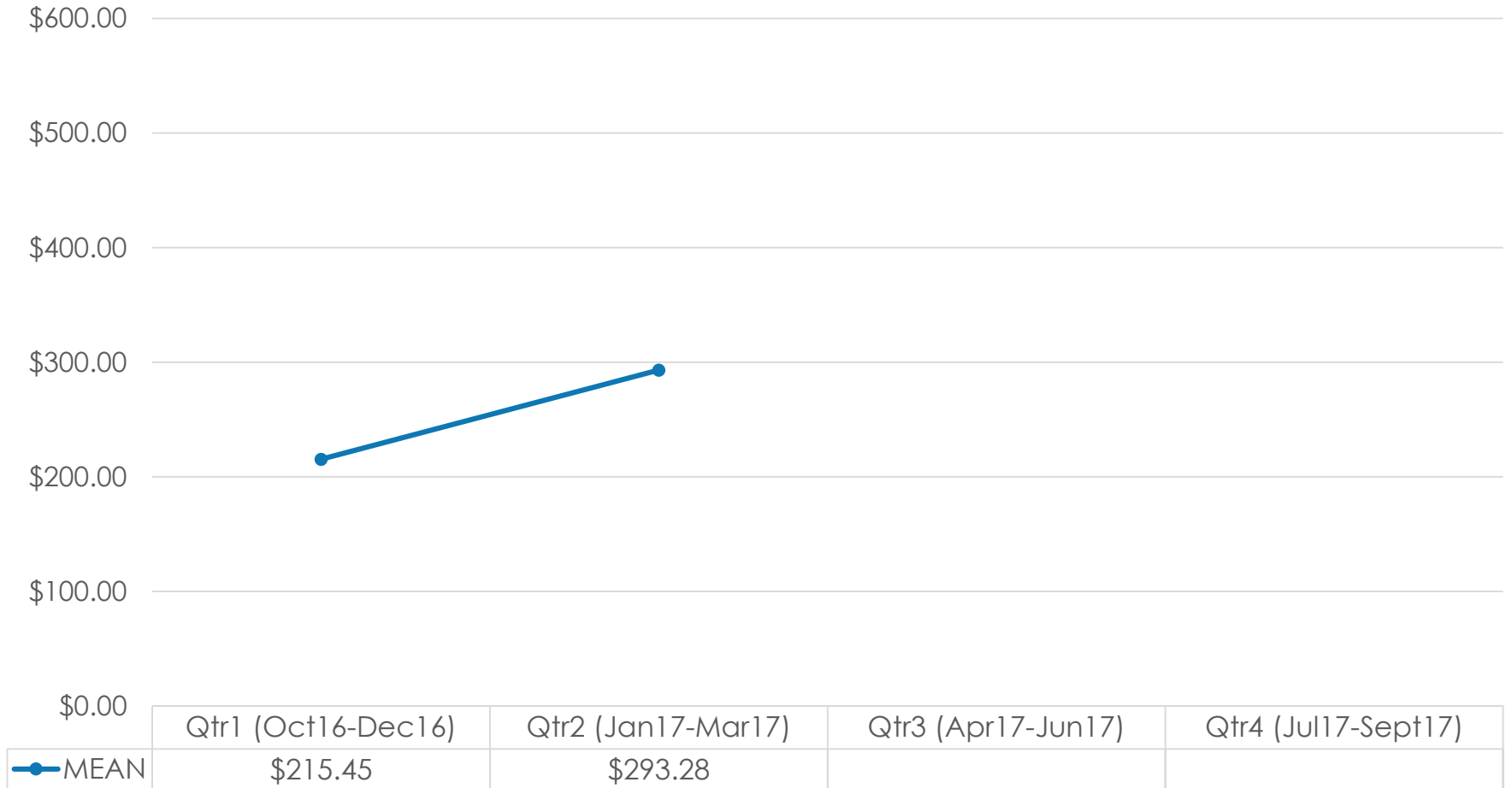
# On-Island – FY2017 Tracking

## Local Transportation



# On-Island – FY2017 Tracking

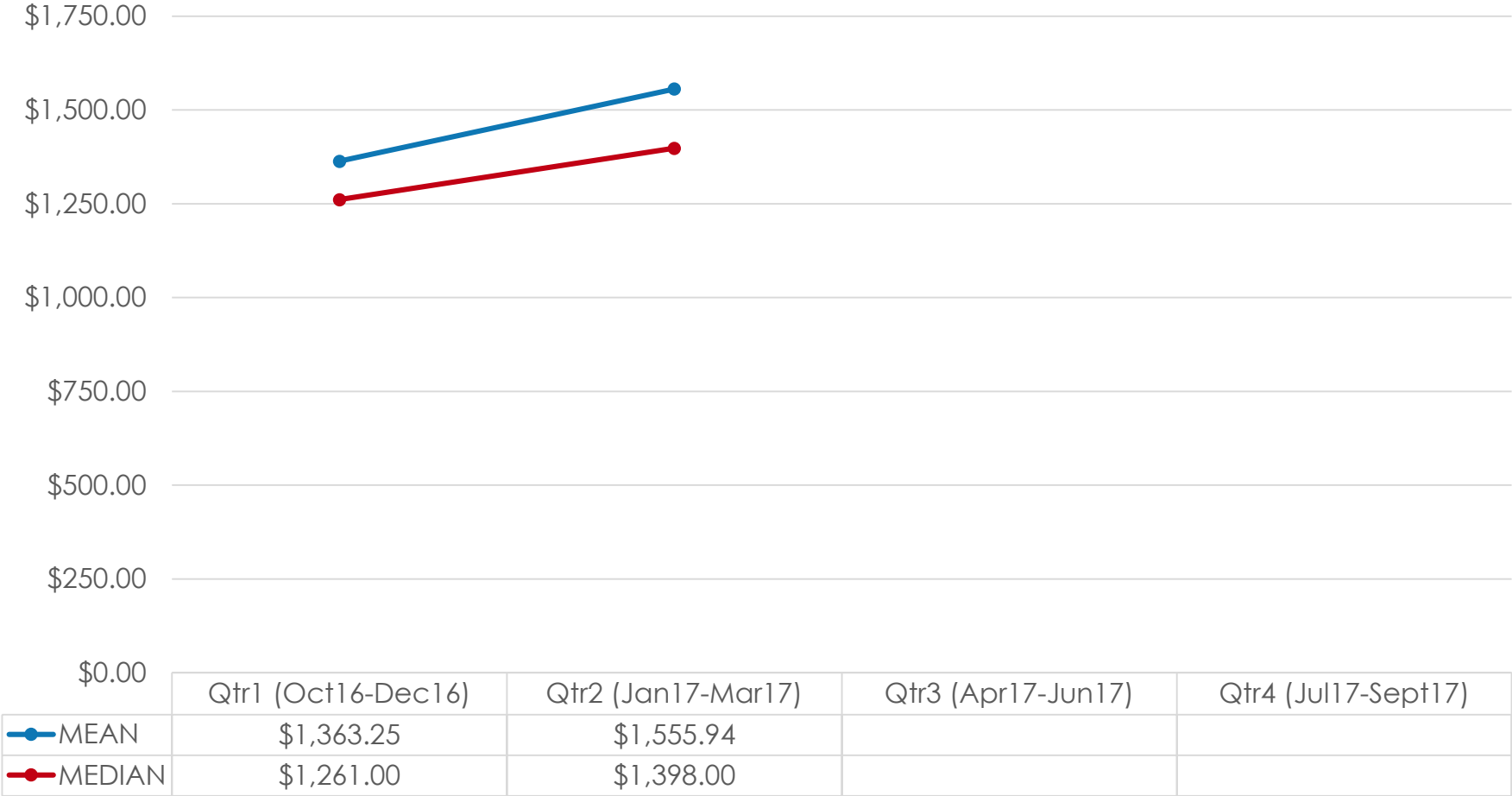
## Other Not Included



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

- \$1,555.94 = overall mean average prepaid expense by respondent/ Per Person

# TOTAL Per Person Expenditures – FY2017 Tracking





# TOTAL Per Person Expenditures – Key Segments

## GUAM VISITORS BUREAU - EXIT SURVEY

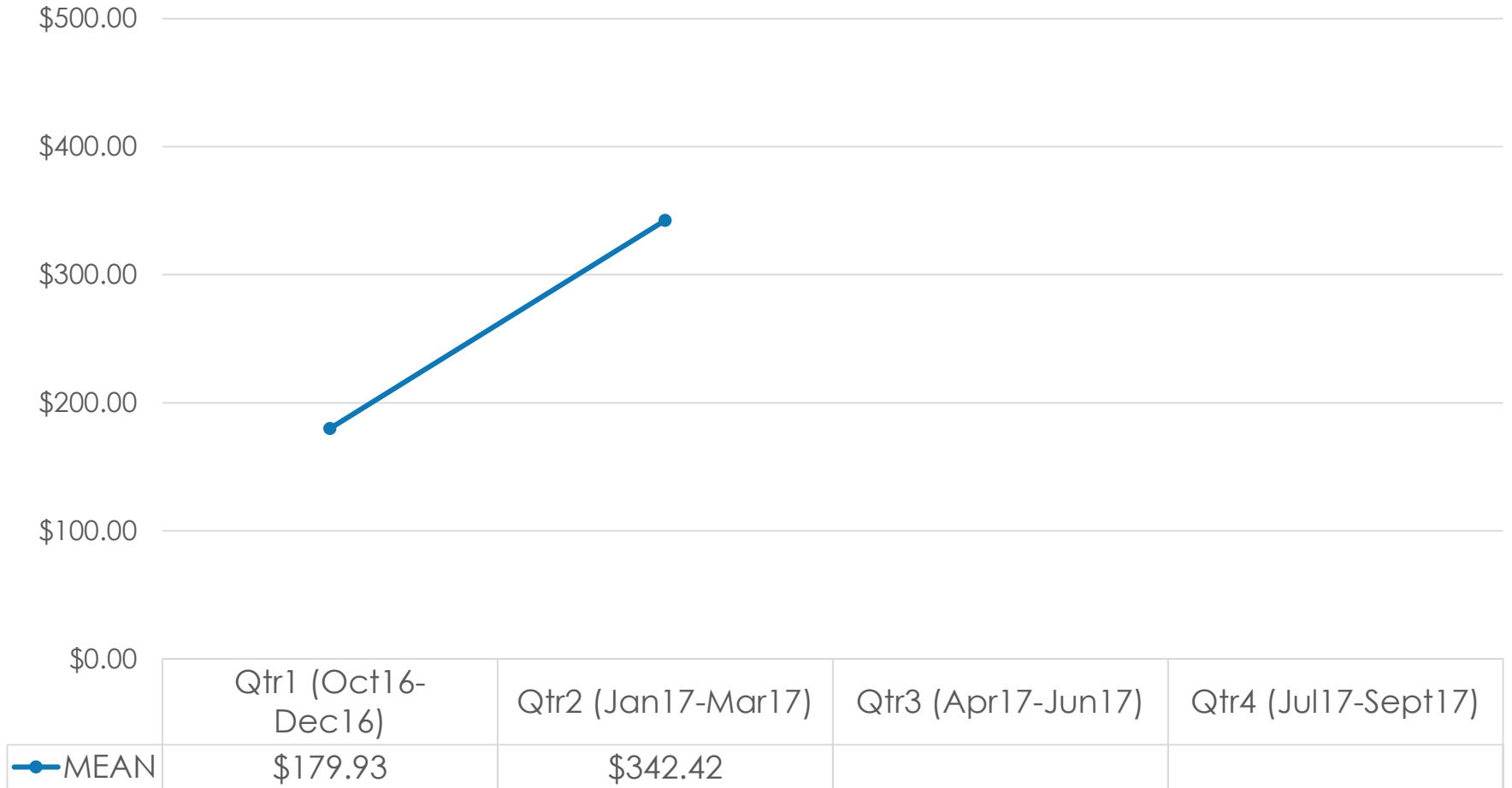
### TOTAL EXPENDITURES (On-Isle / Prepaid)

#### PER PERSON

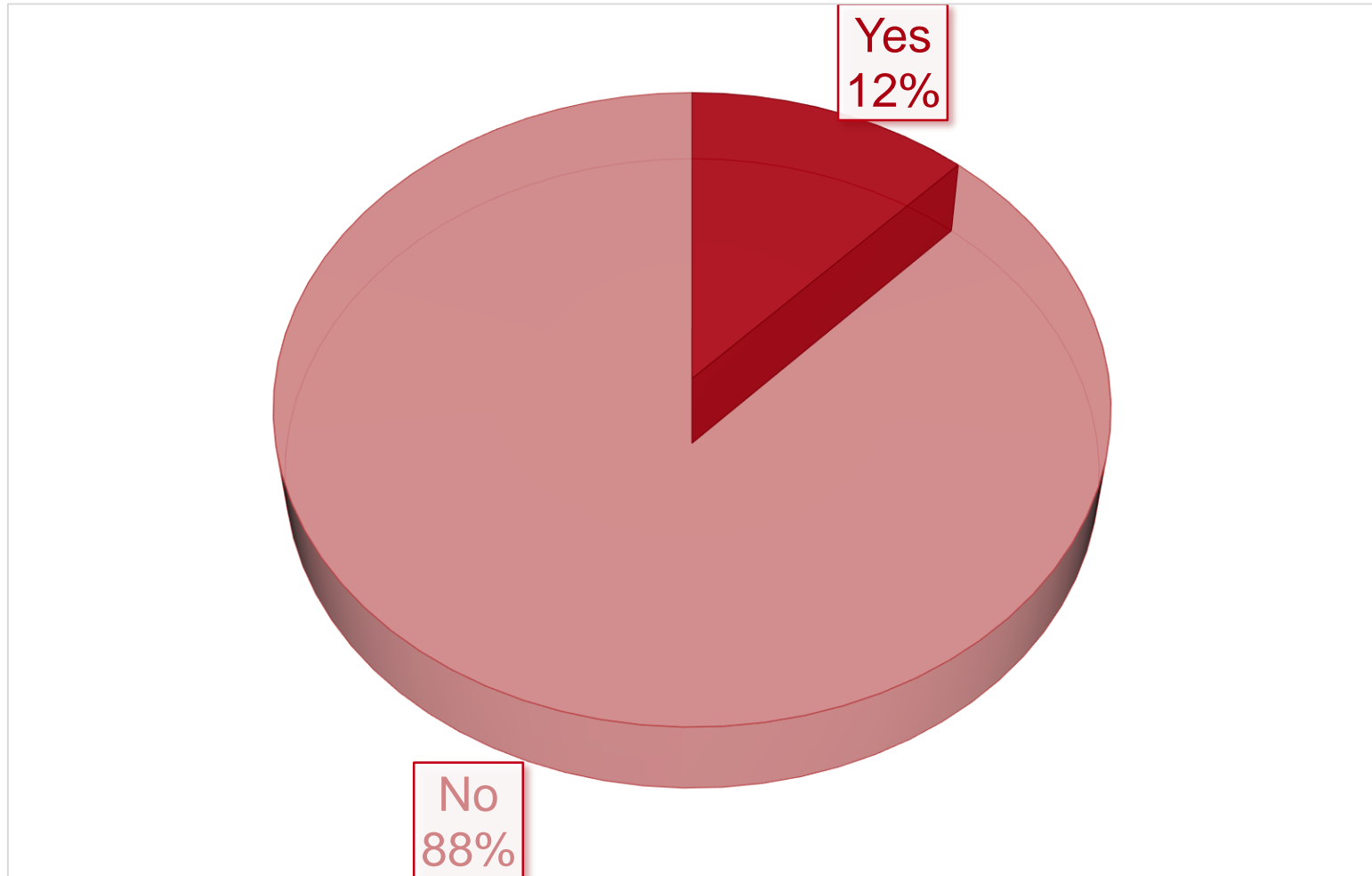
|       |        | TOTAL      | MICE       | SPORTS/<br>ADVENTURE | HONEYMOON  |
|-------|--------|------------|------------|----------------------|------------|
|       |        | -          | -          | -                    | -          |
| TOTPP | Mean   | \$1,555.94 | \$1,250.30 | \$1,571.77           | \$1,732.20 |
|       | Median | \$1,398    | \$1,187    | \$1,322              | \$1,846    |

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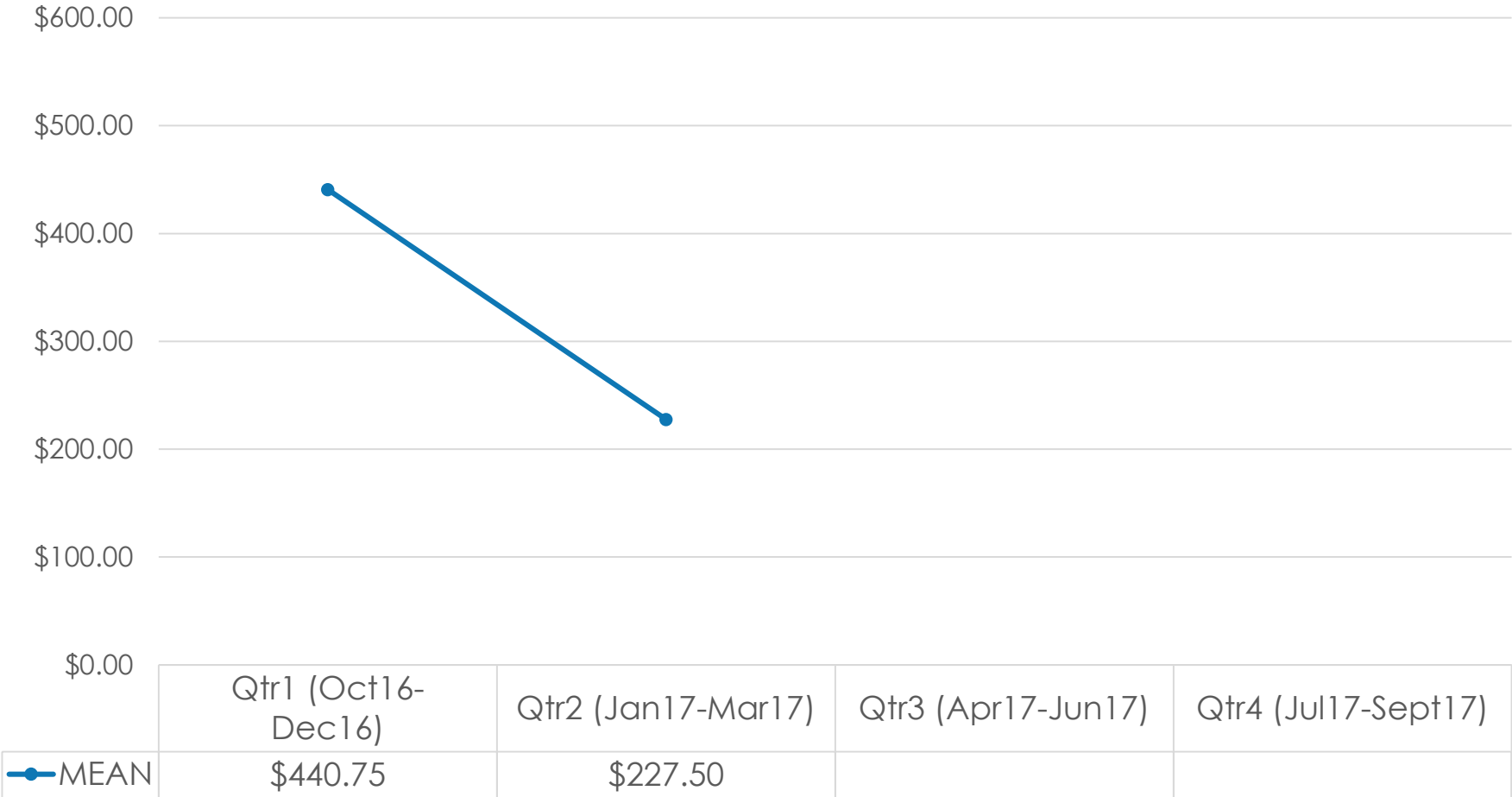
# GUAM AIRPORT EXPENDITURE – FY2017 Tracking



# PARTICIPATED IN SHOP GUAM e-FESTIVAL



# SHOP GUAM E-FESTIVAL SPENDING – FY2017 Tracking

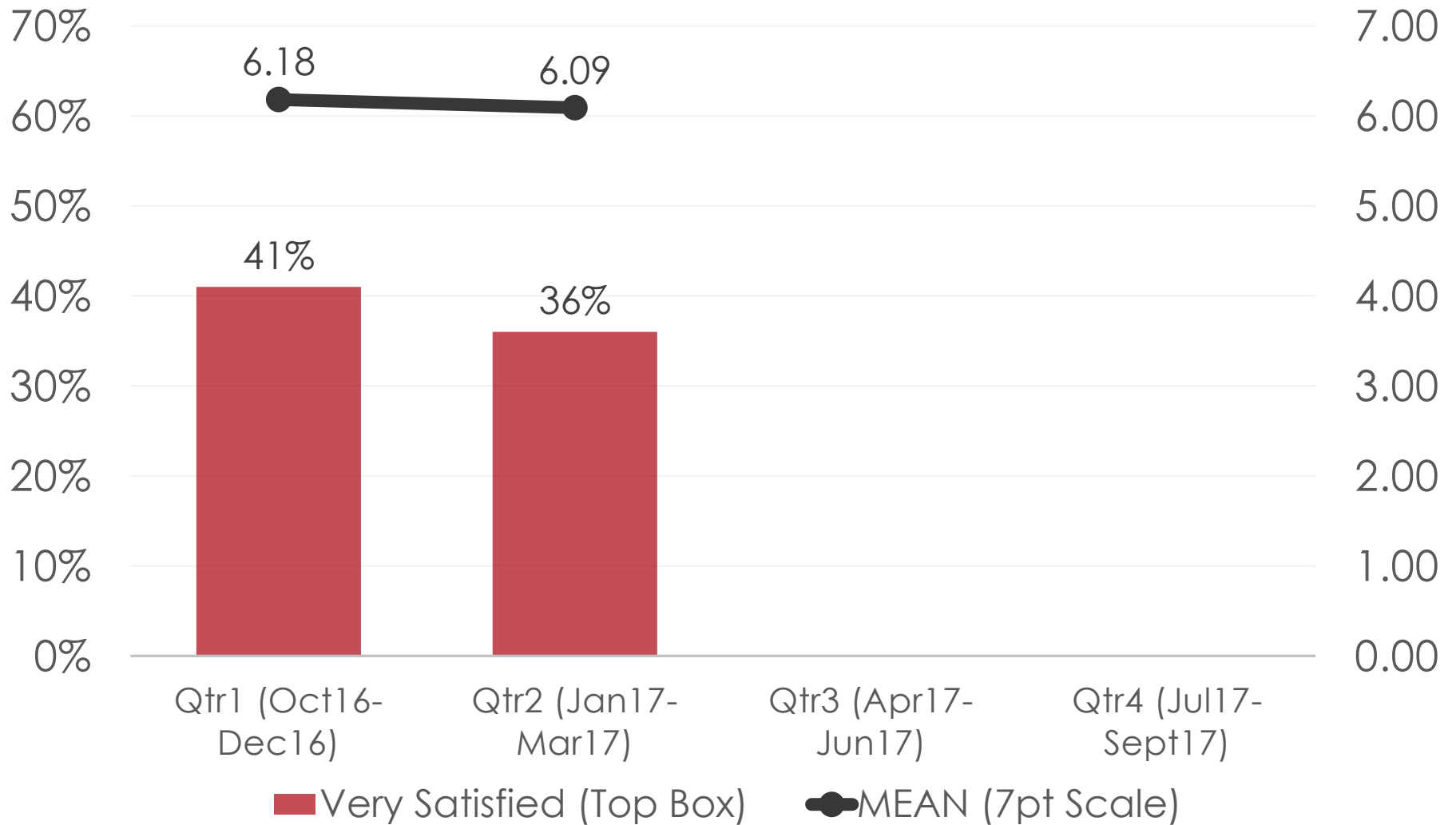


# SECTION 4

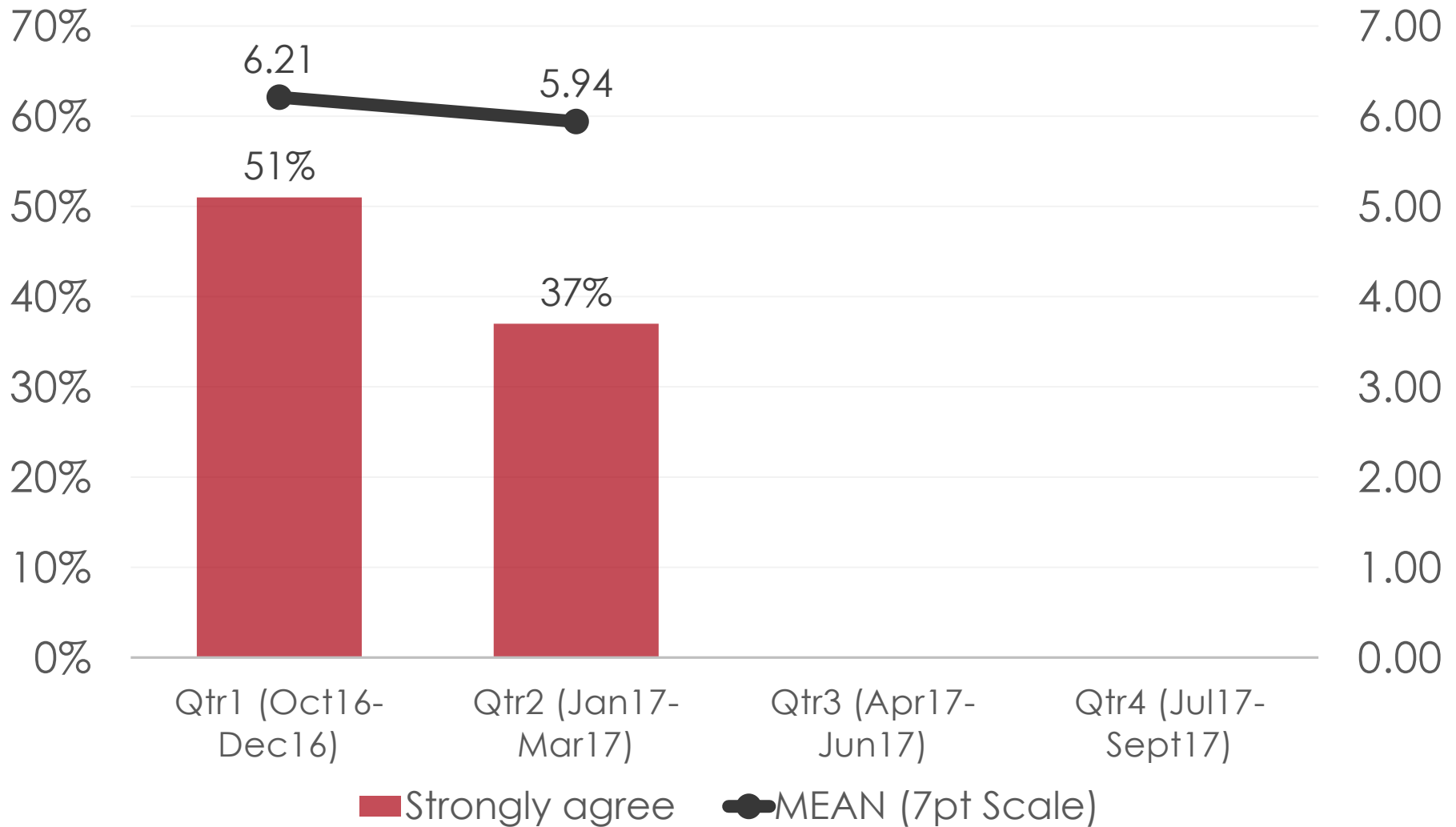
# VISITOR SATISFACTION

# BEHAVIOR

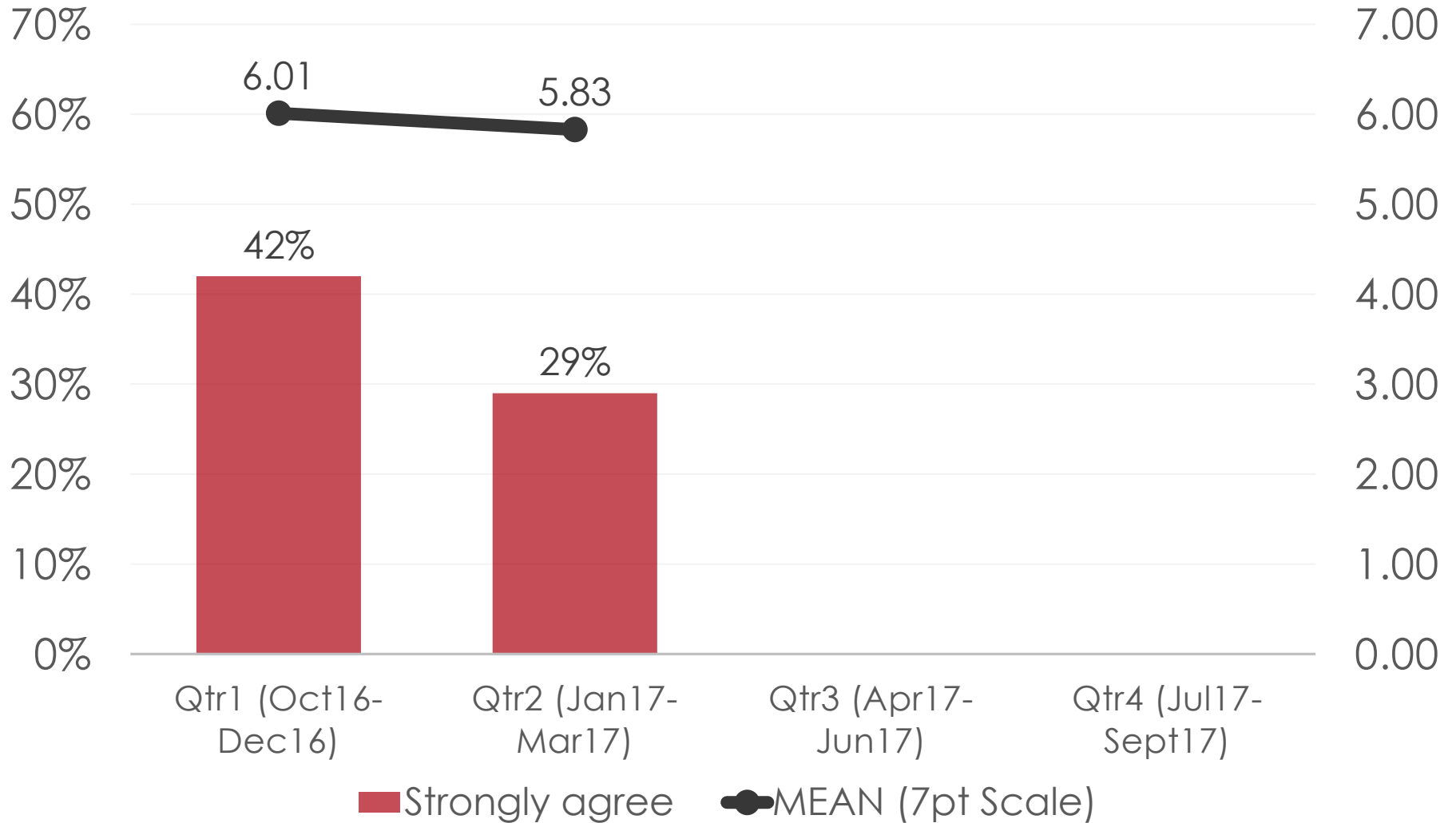
# OVERALL SATISFACTION



# Guam was better than expected

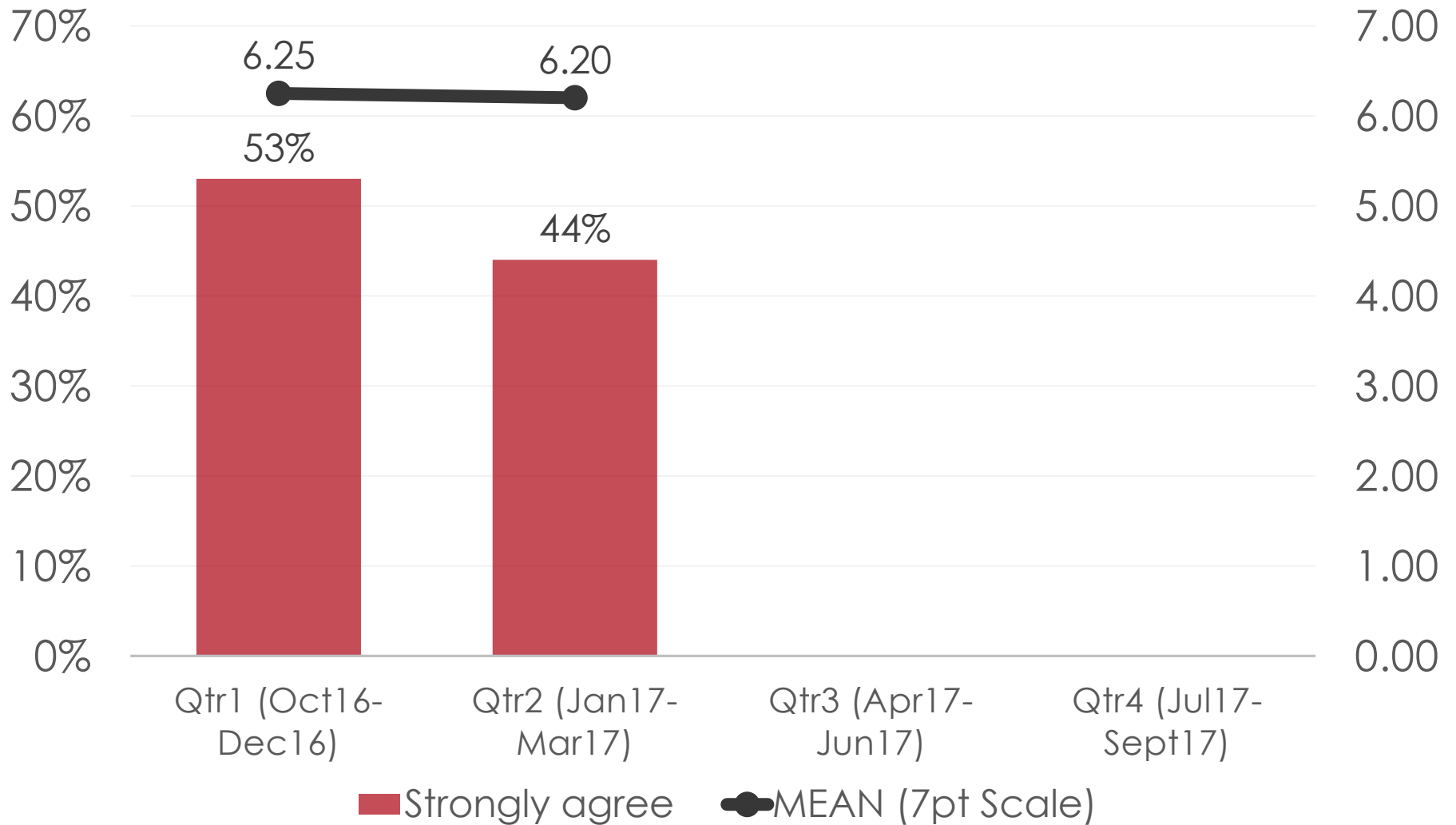


# I had no communication problems

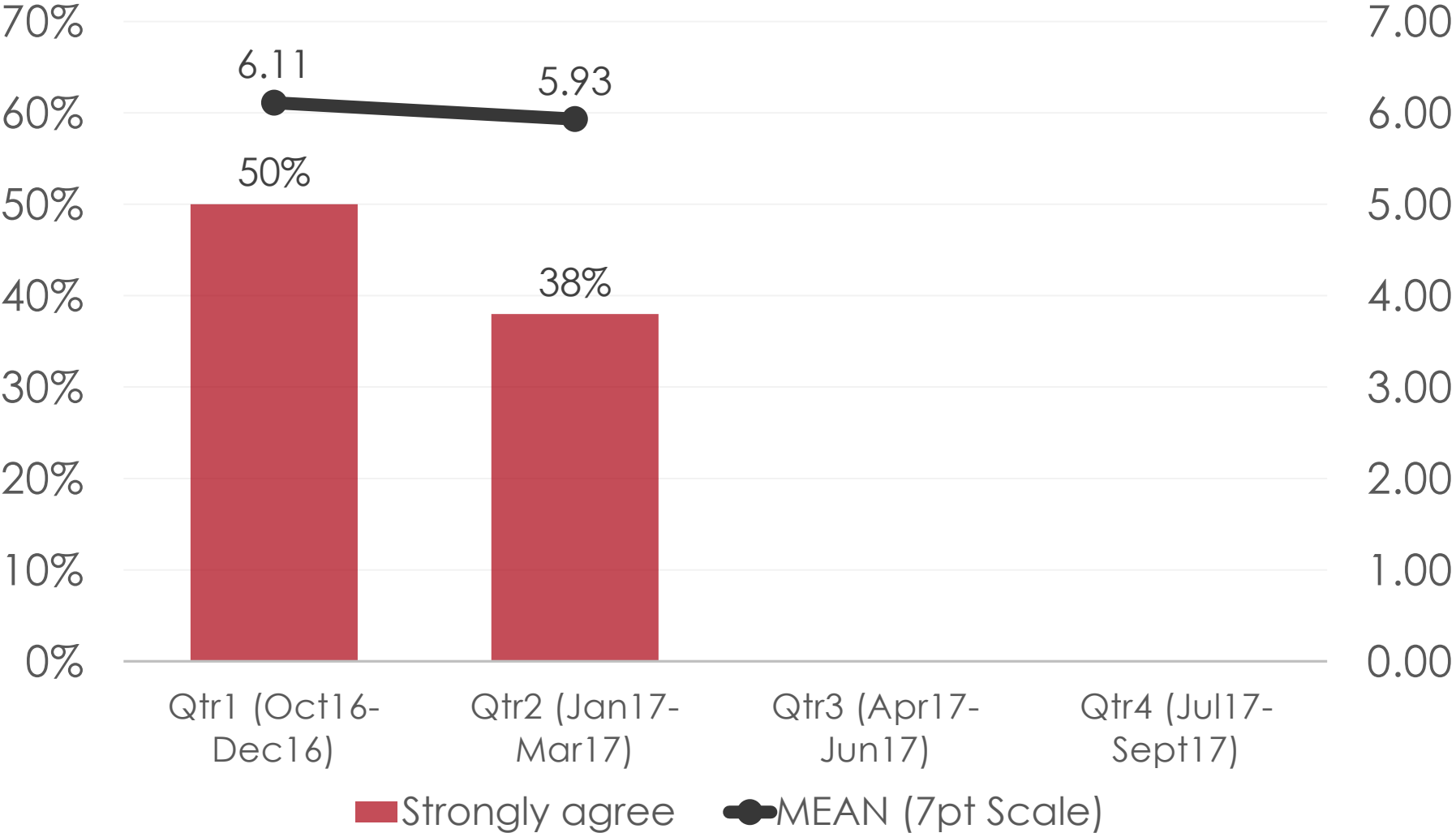




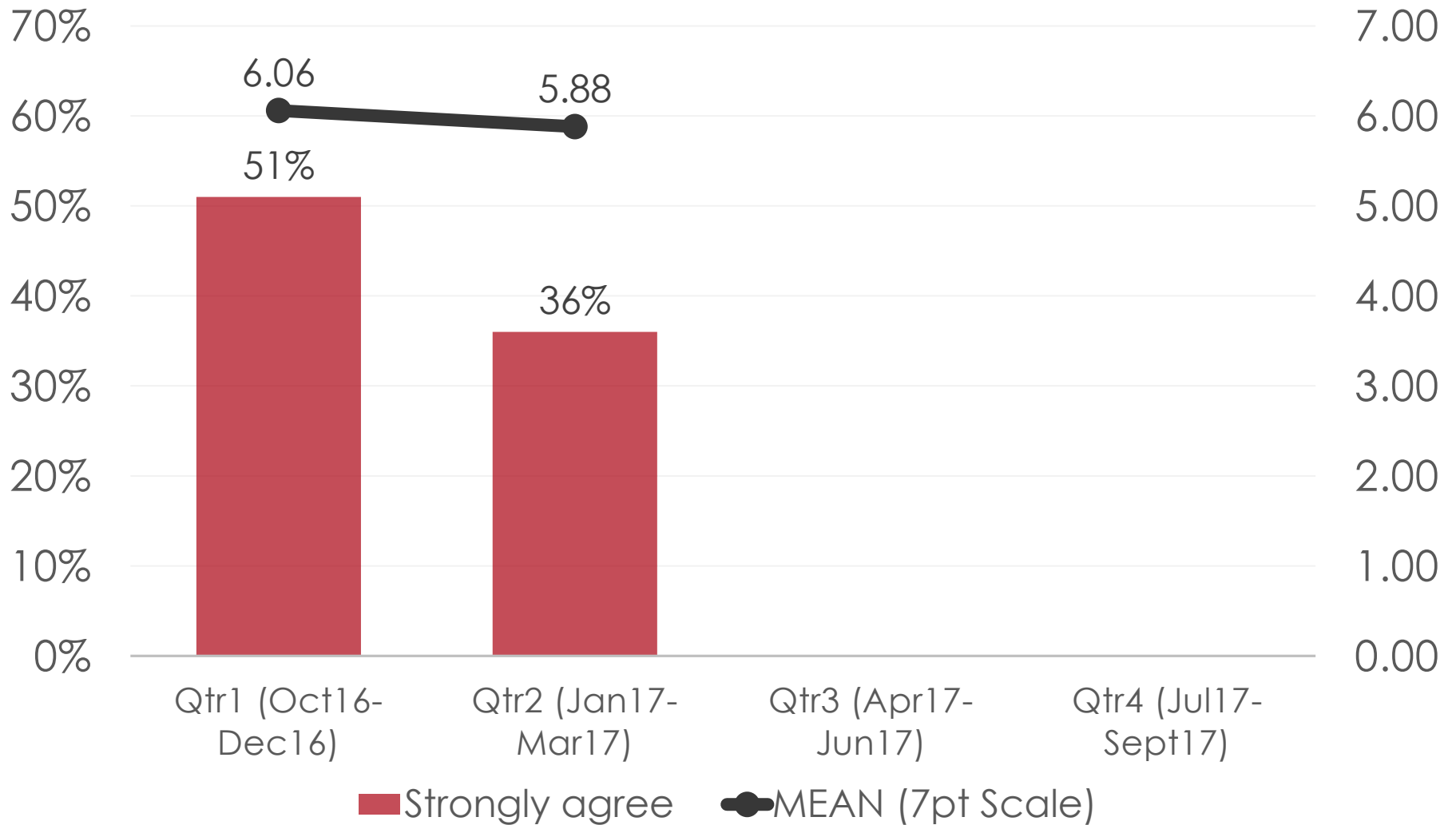
# I will recommend Guam to friends



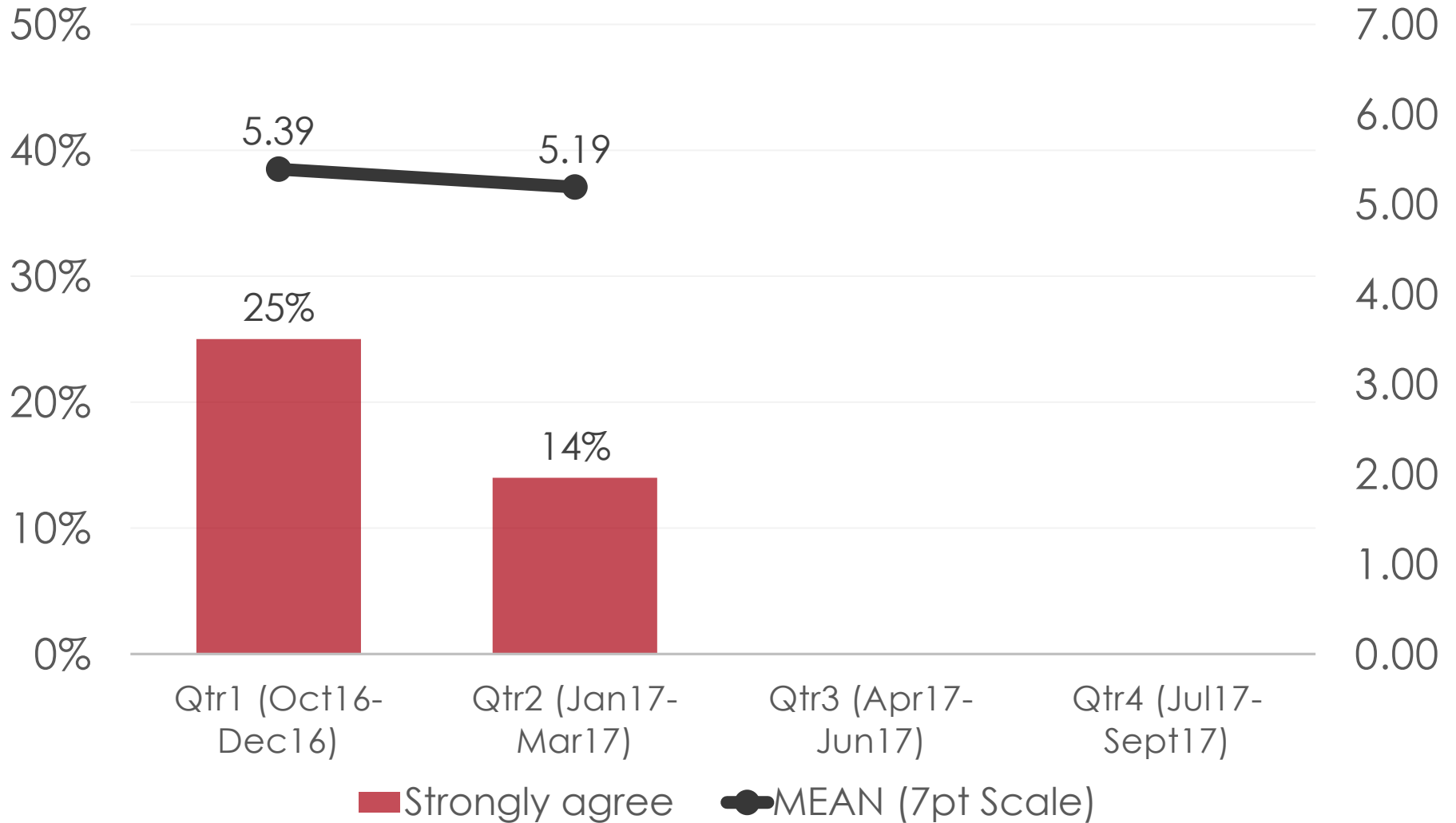
# Sites on Guam were attractive



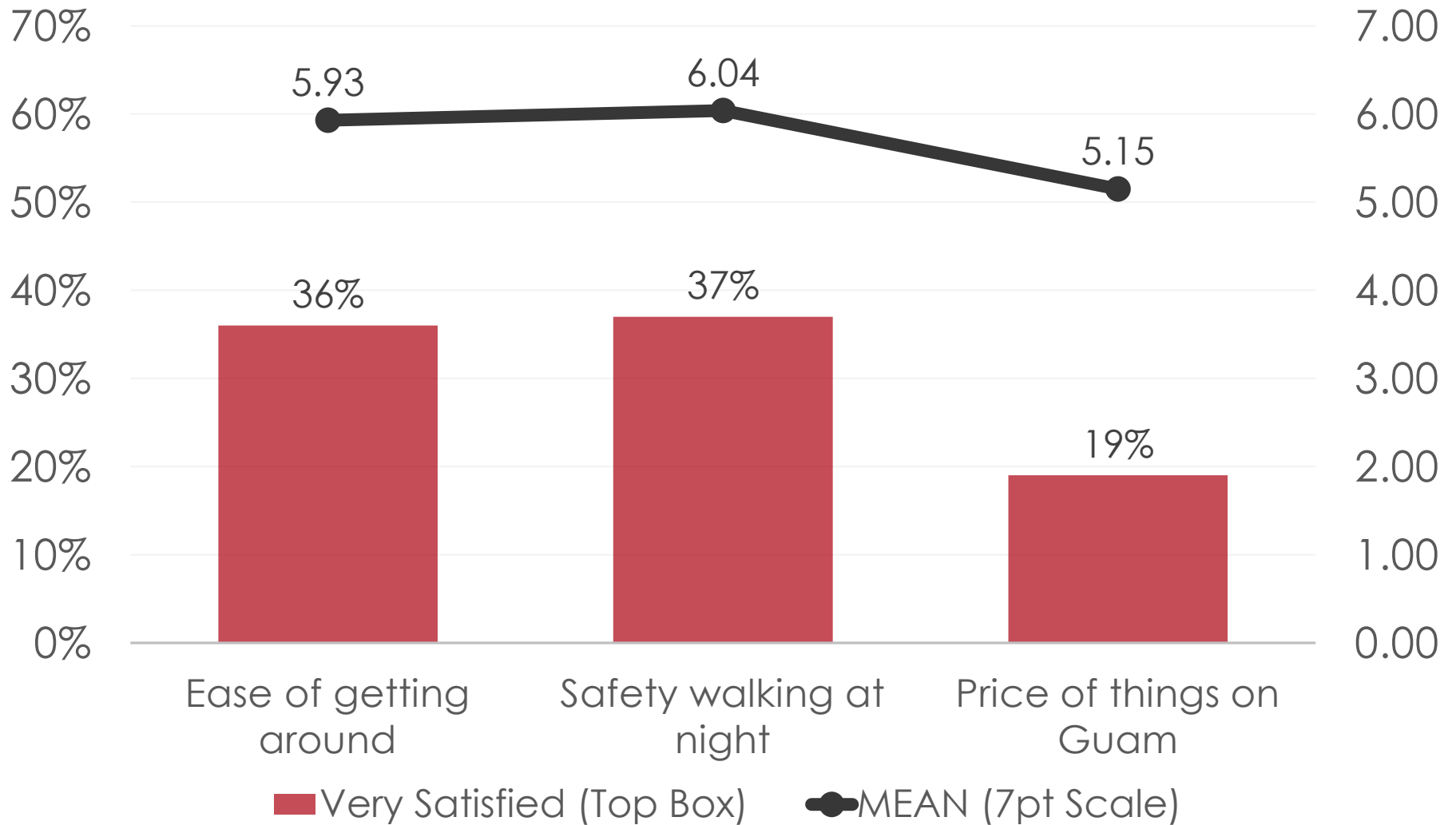
# I plan to visit Guam again



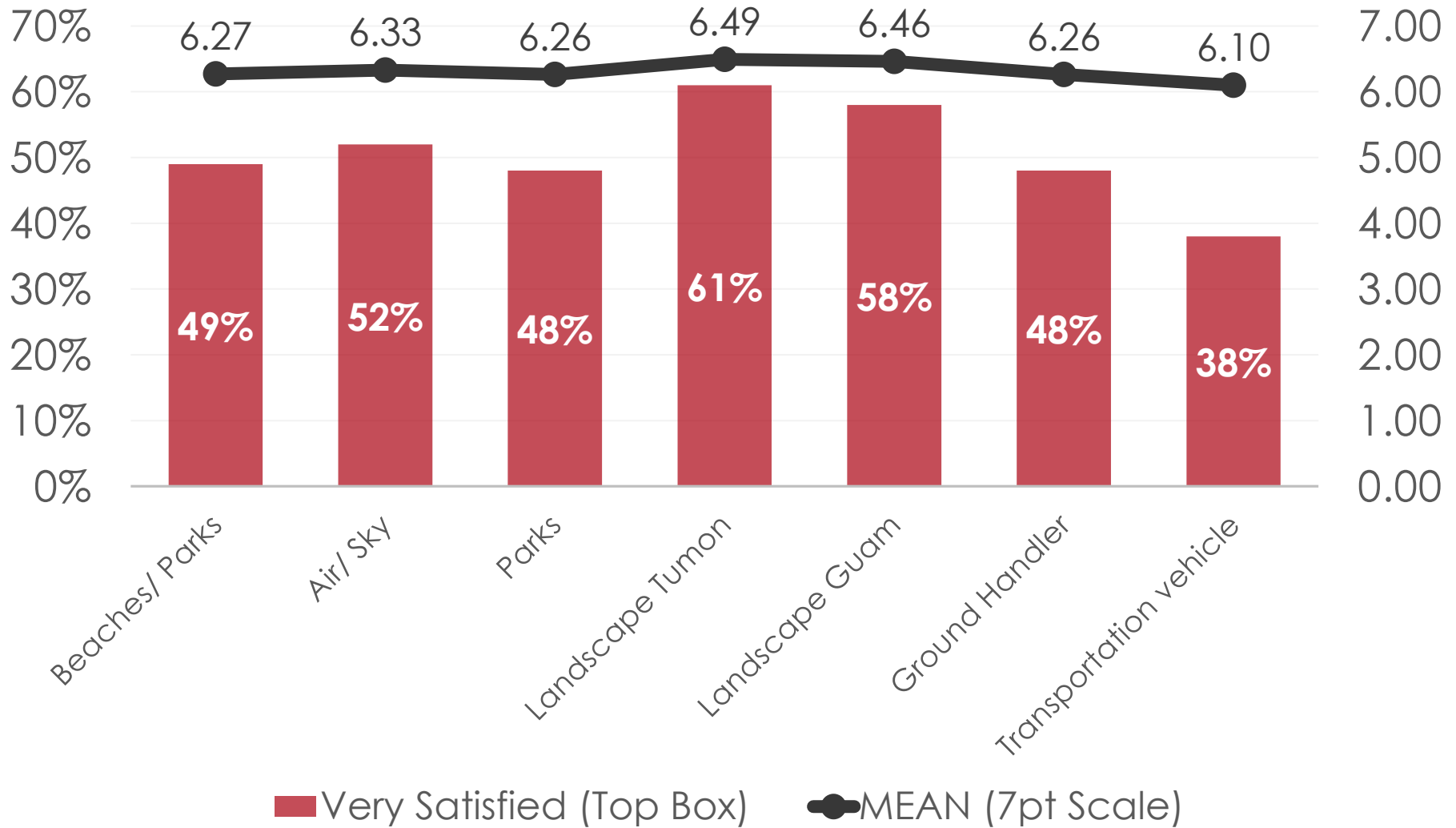
# Not enough night time activities



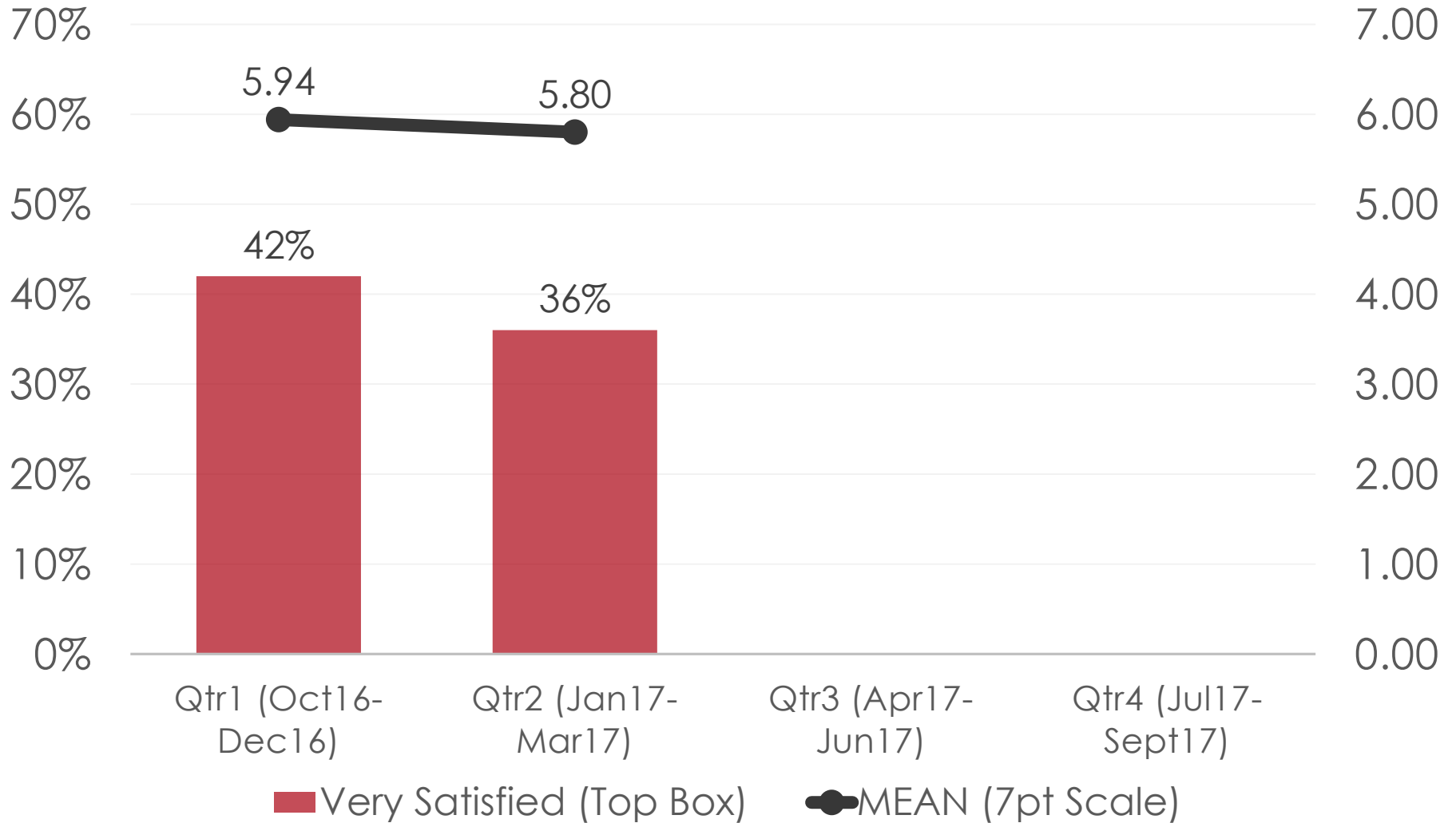
# GENERAL SATISFACTION



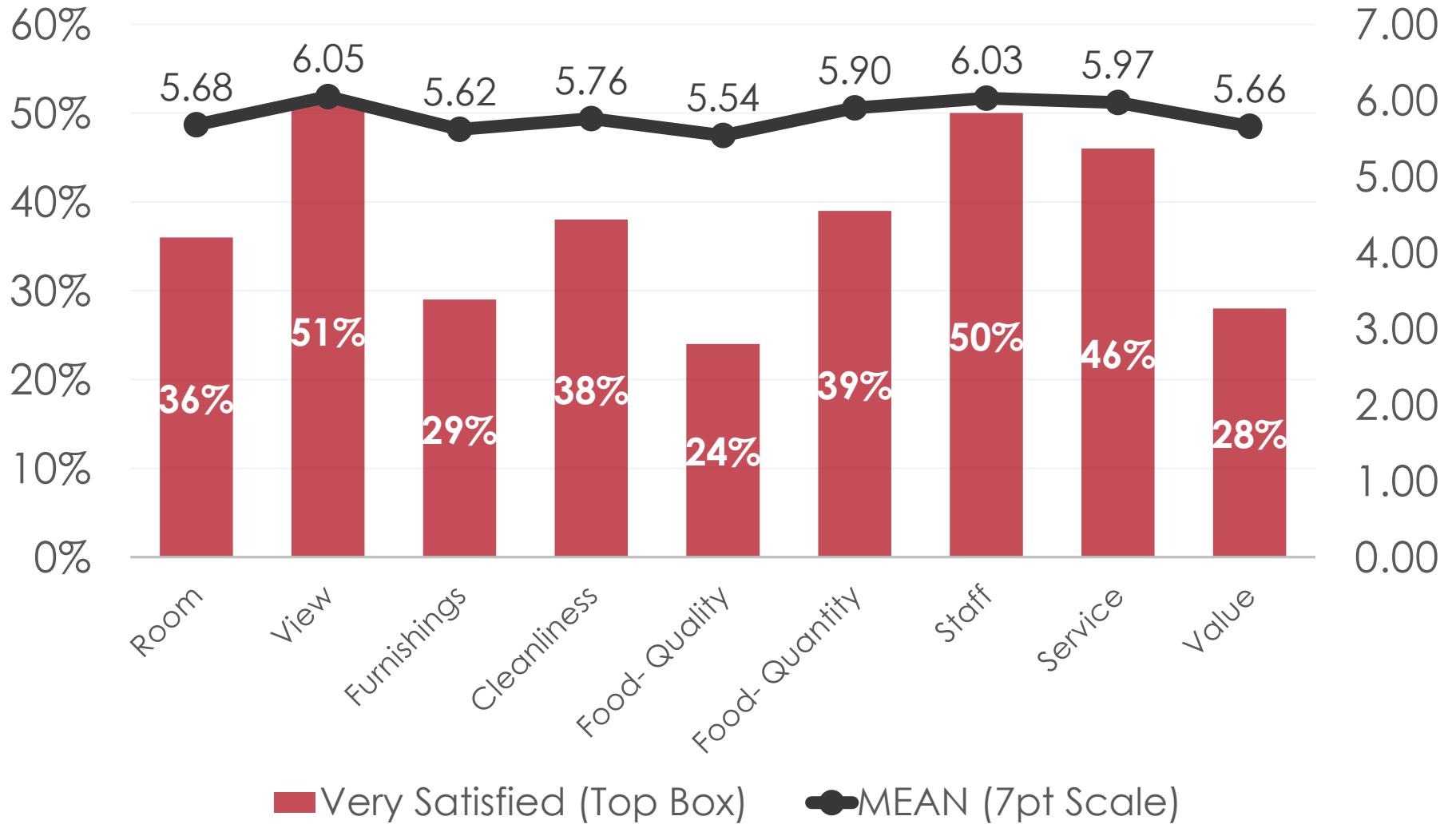
# GENERAL SATISFACTION – Quality/ Cleanliness



# ACCOMMODATIONS – OVERALL SATISFACTION

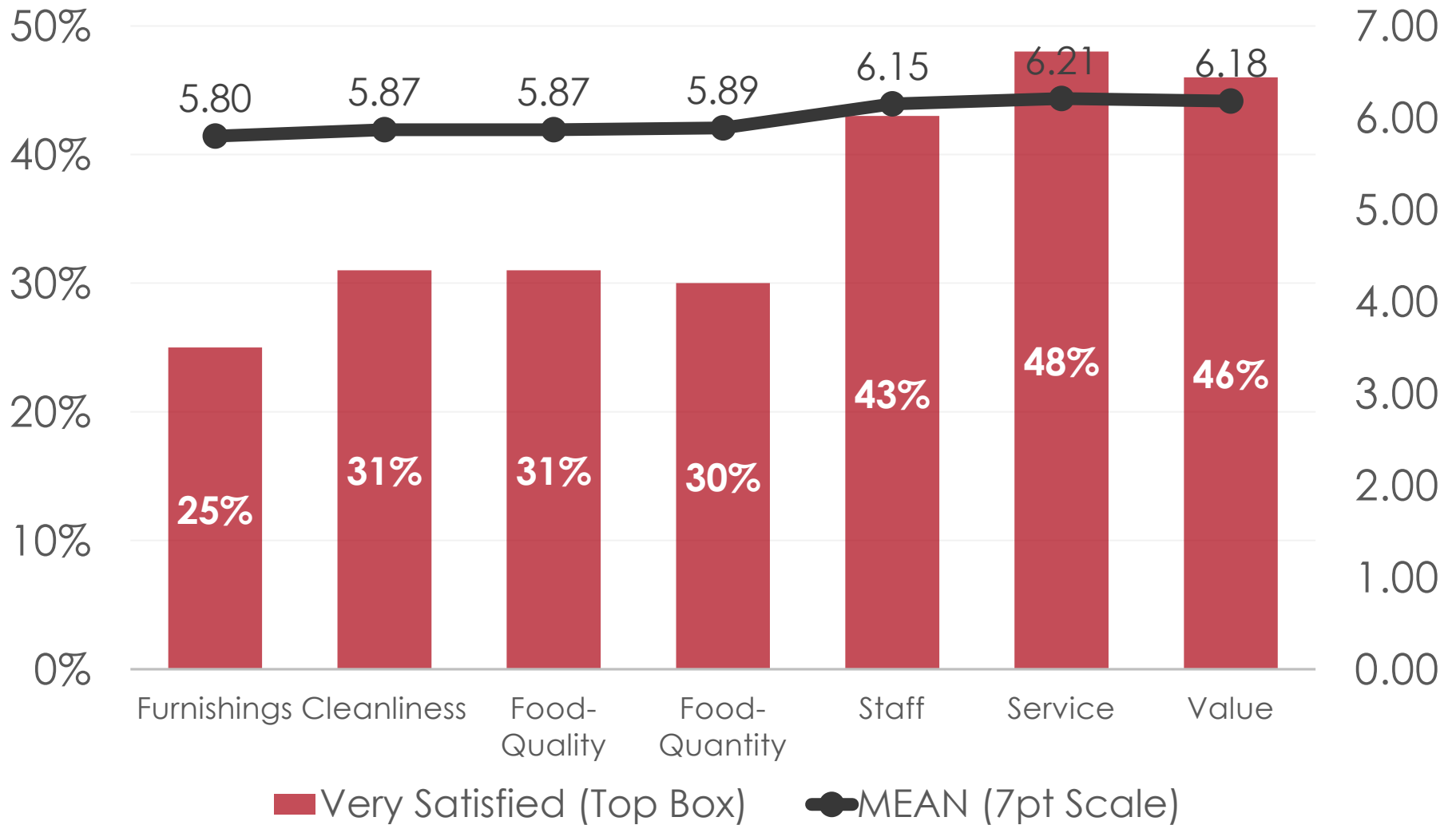


# ACCOMMODATIONS – Satisfaction by Category

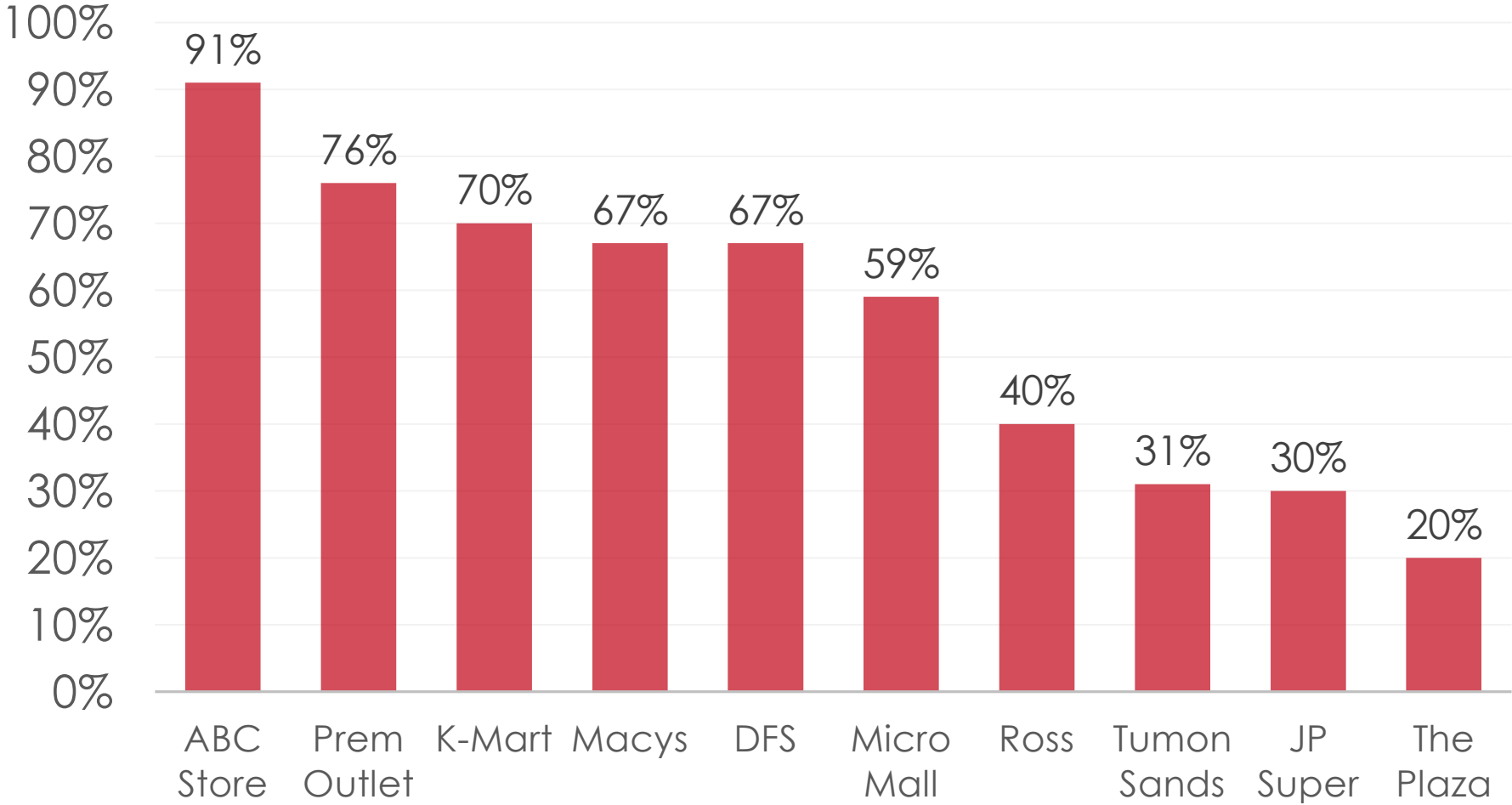




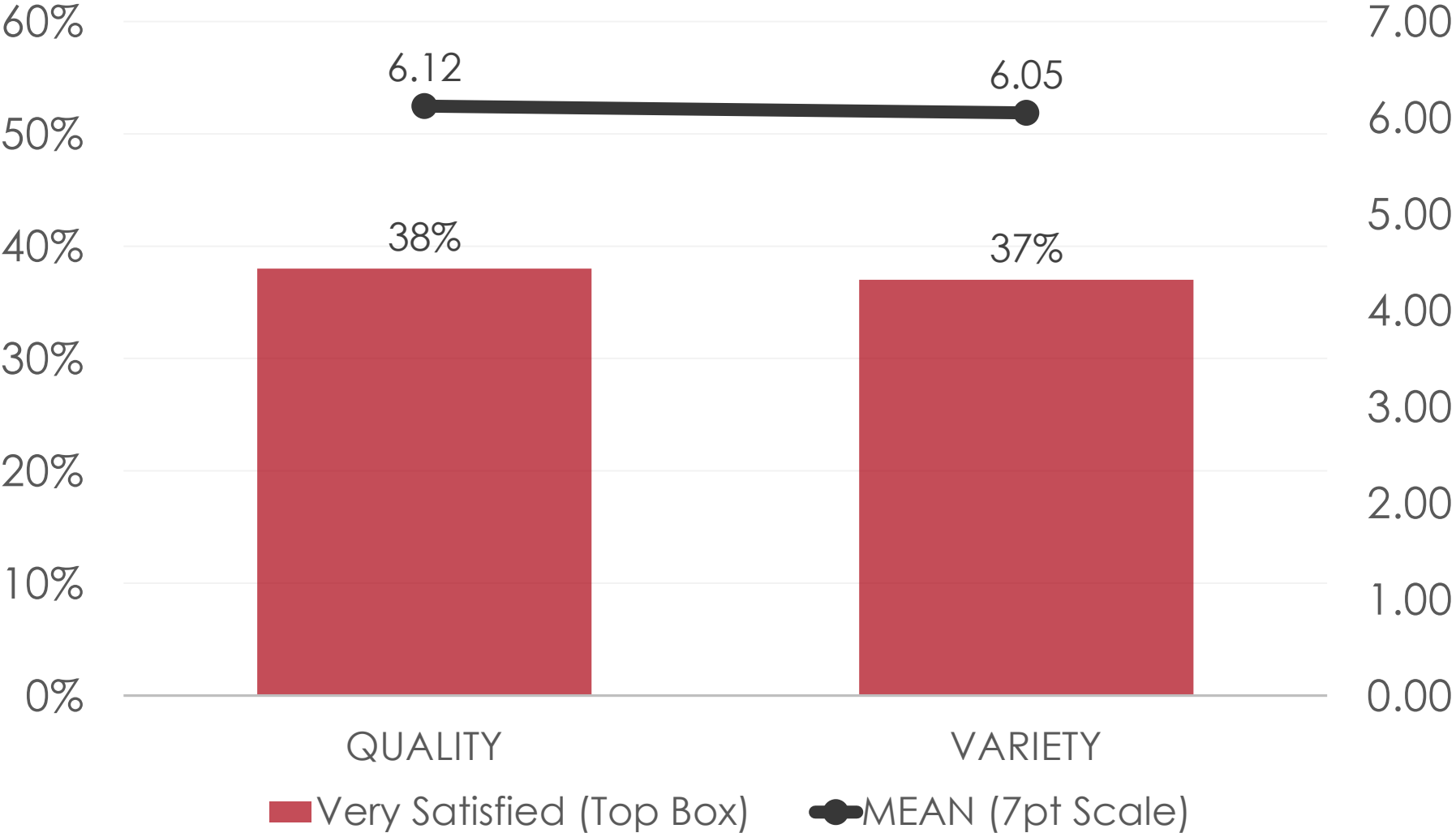
# DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



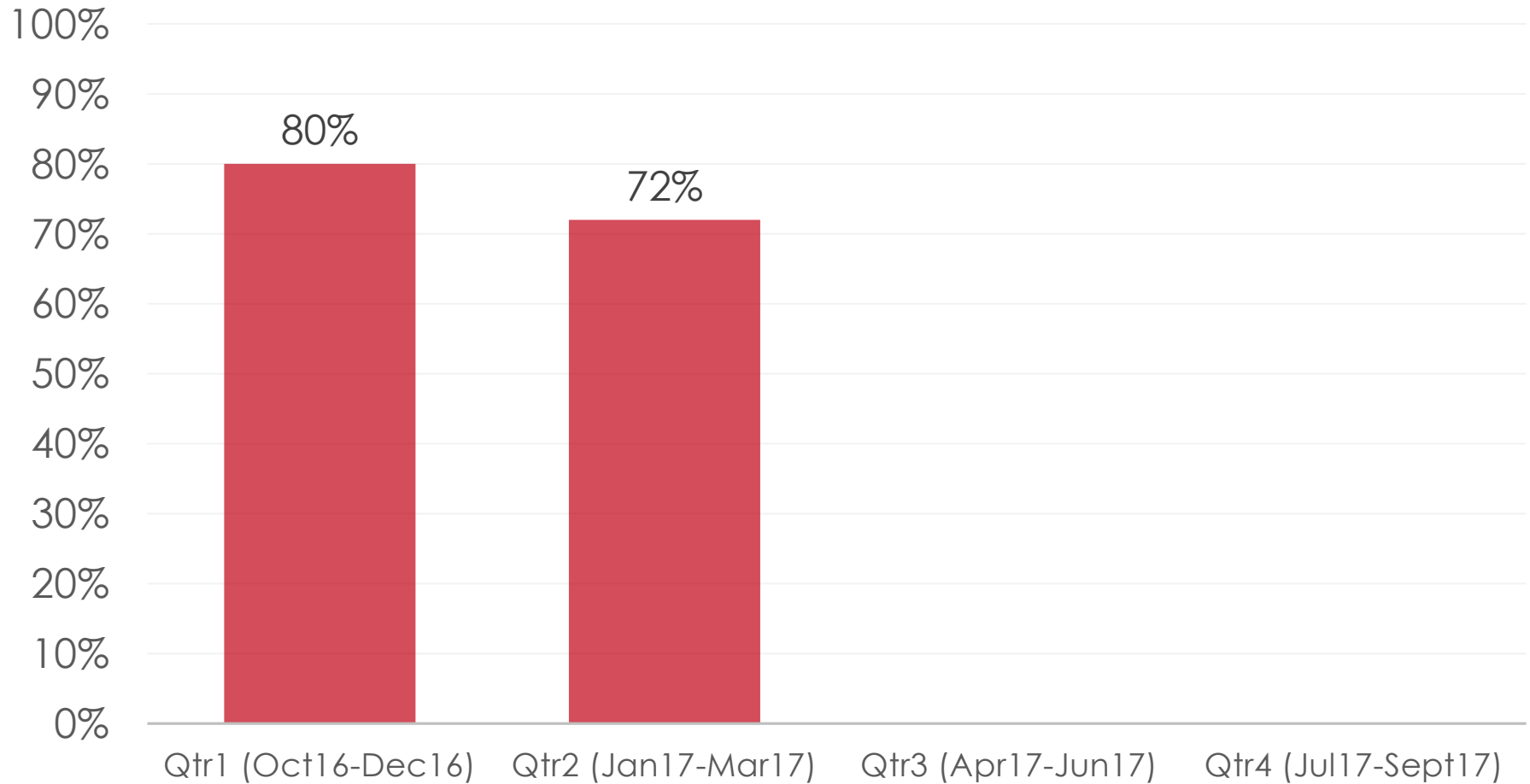
# Shopping Malls/ Stores (Top Responses)



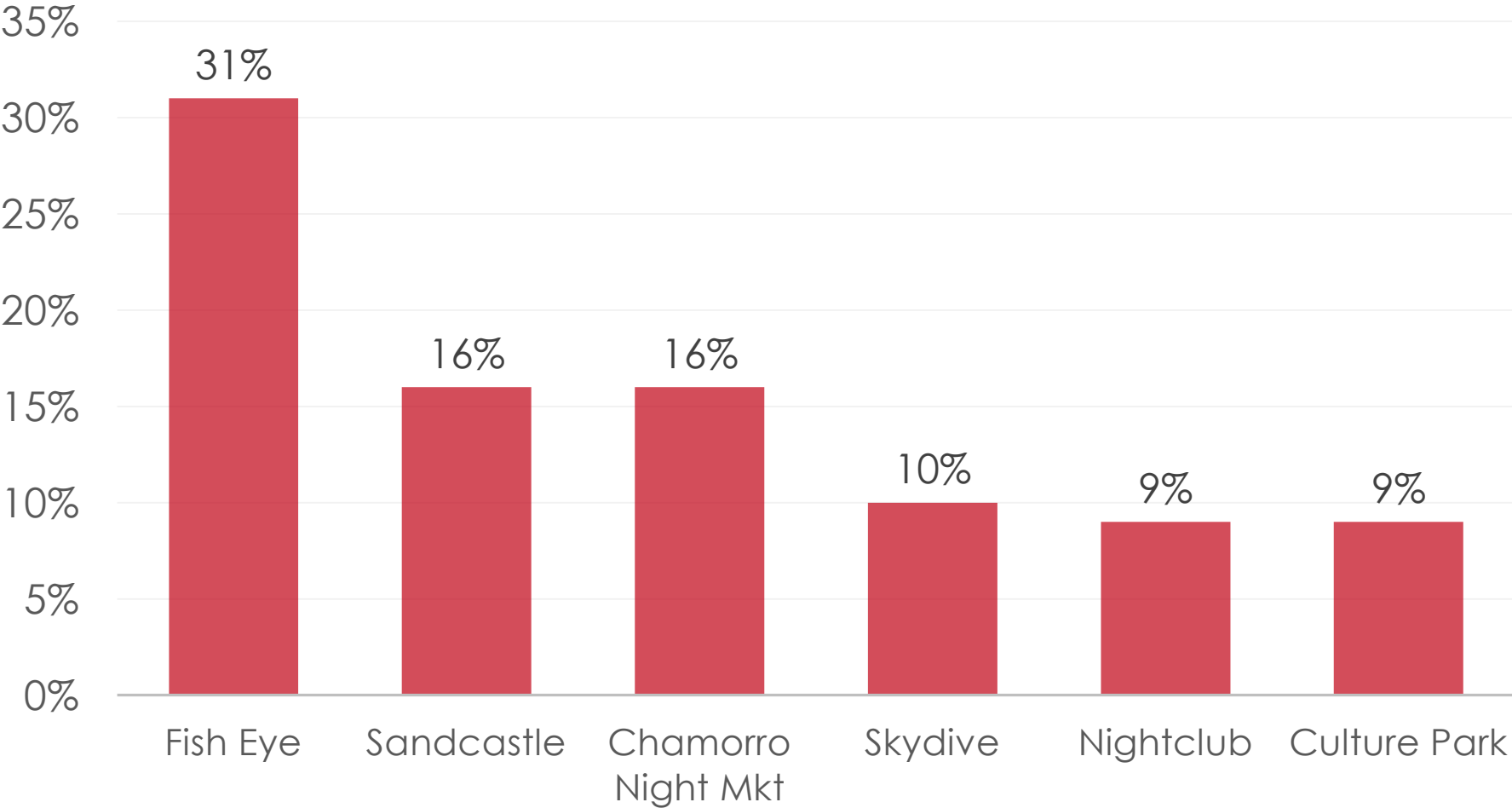
# SHOPPING - SATISFACTION



# OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

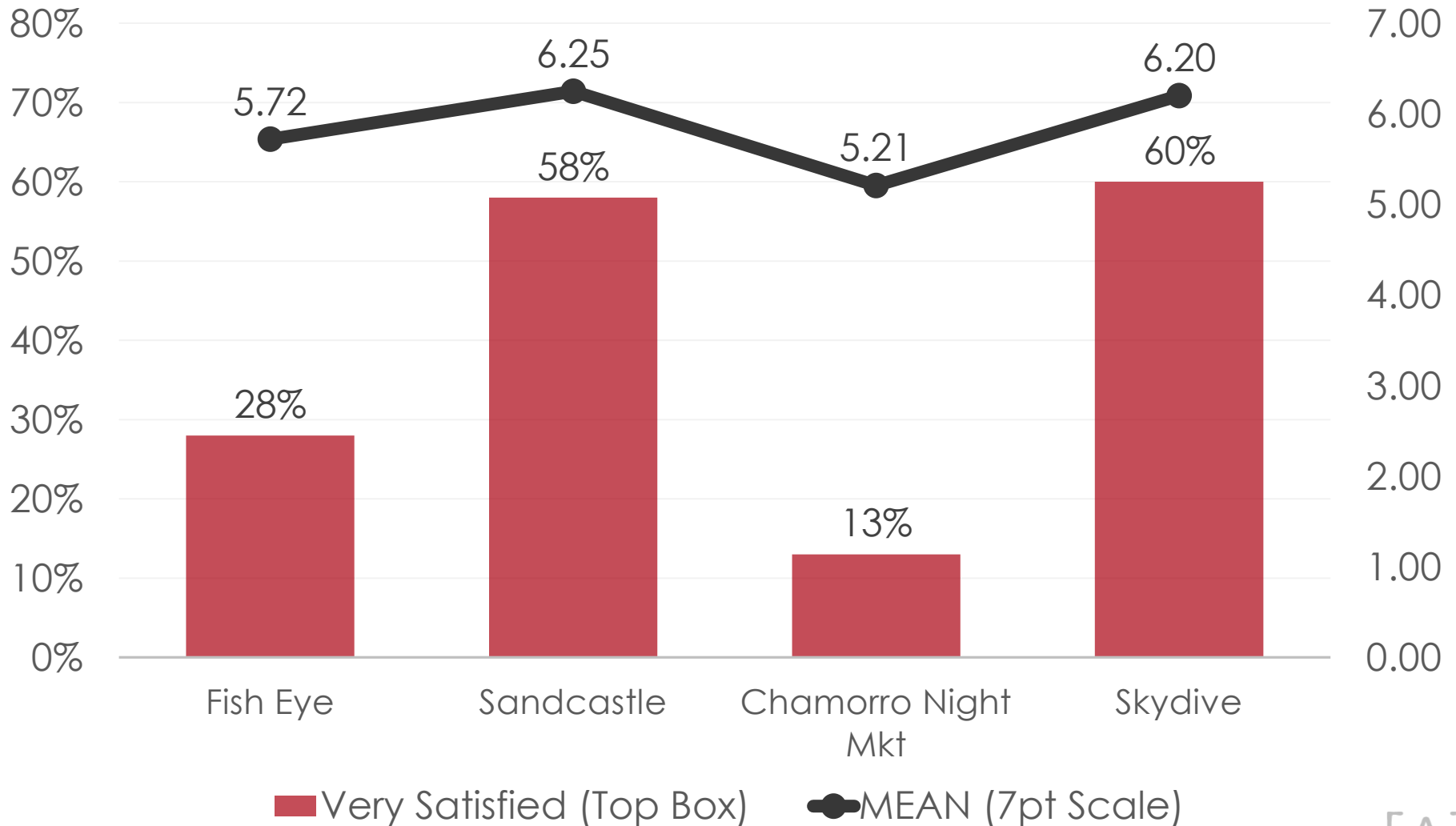


# Optional Tour Participation (Top Responses)

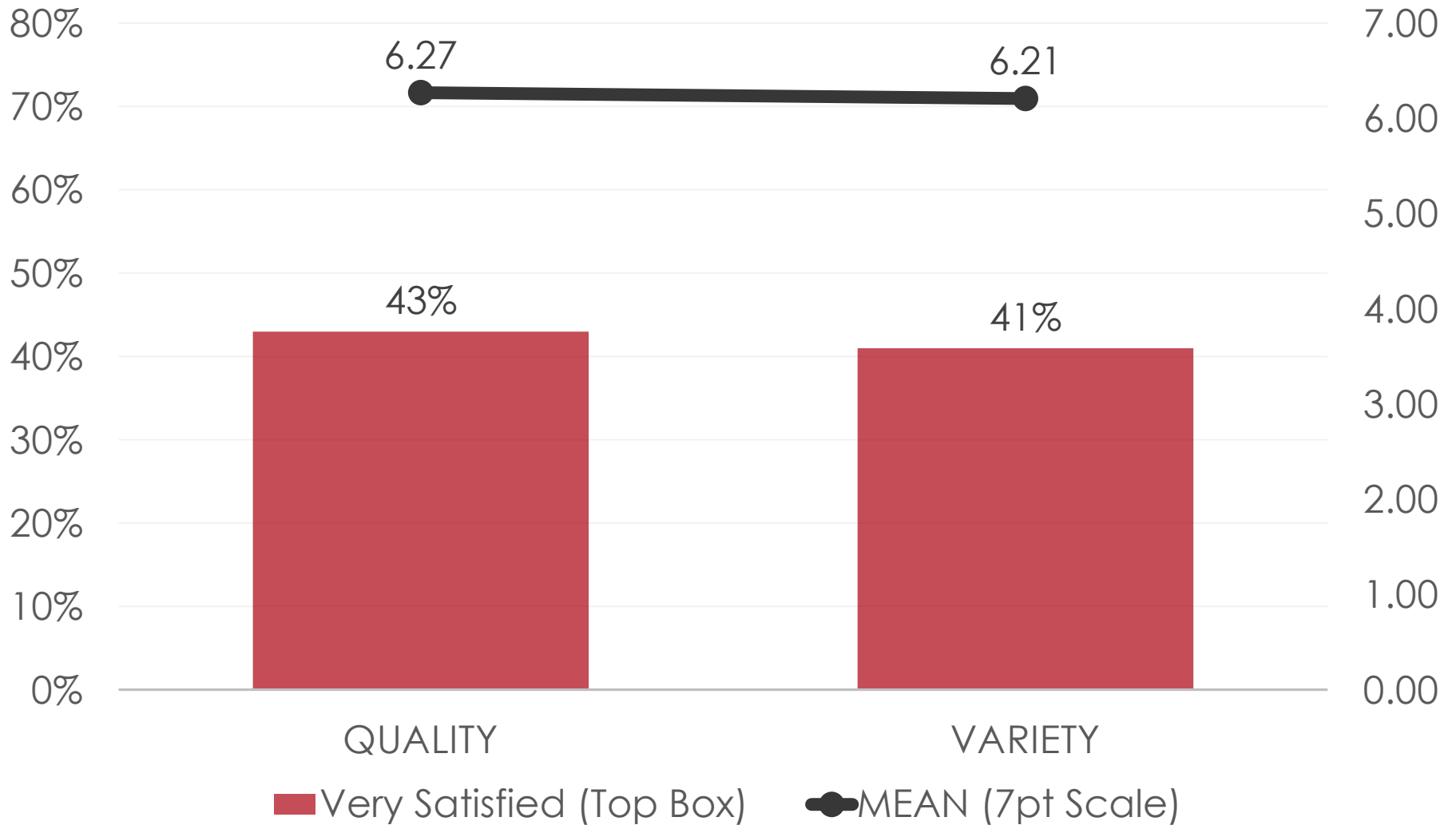


# Optional Tour Satisfaction

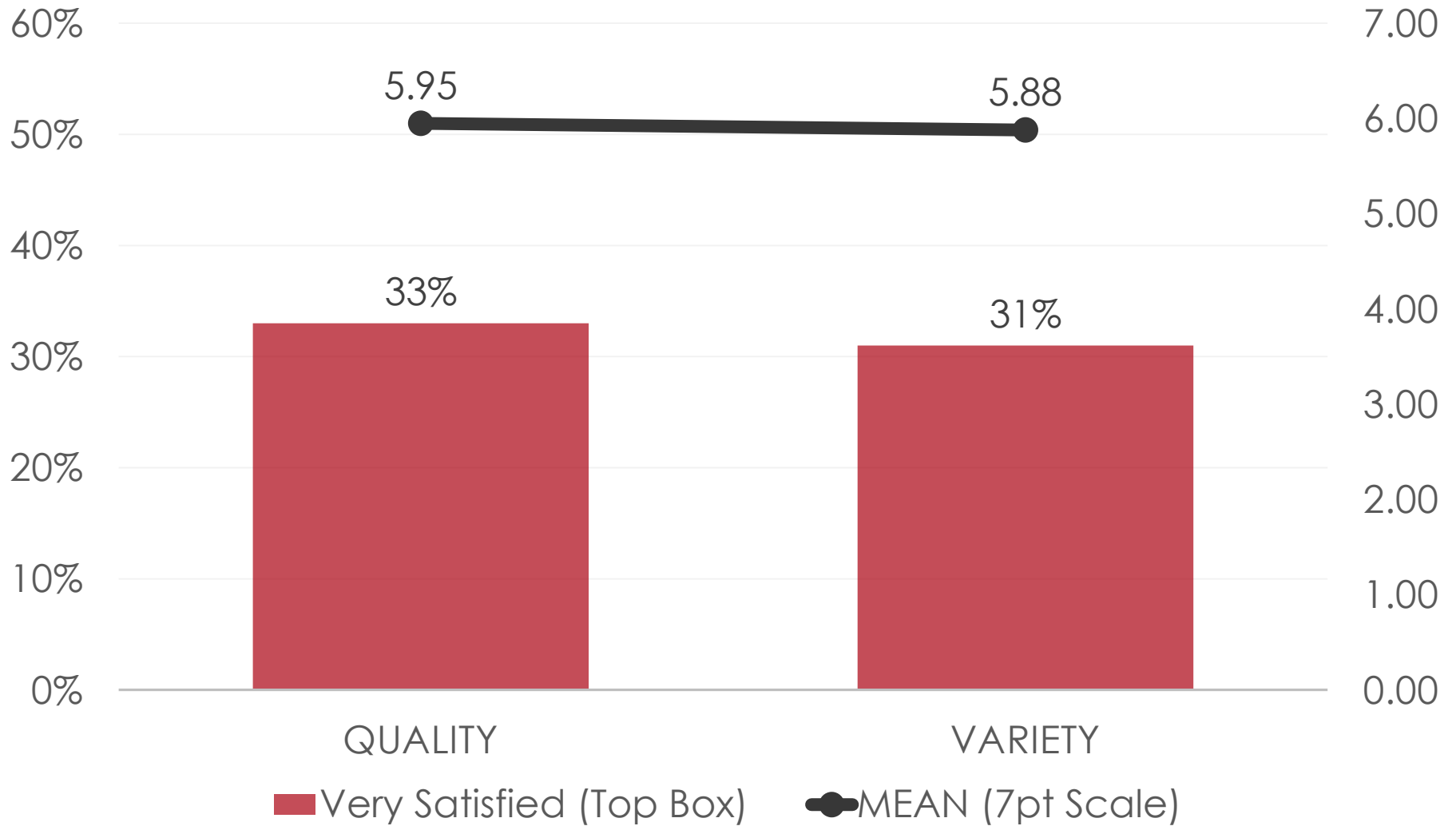
## Top Responses only - Participation (10%+)



# DAY TOUR - SATISFACTION

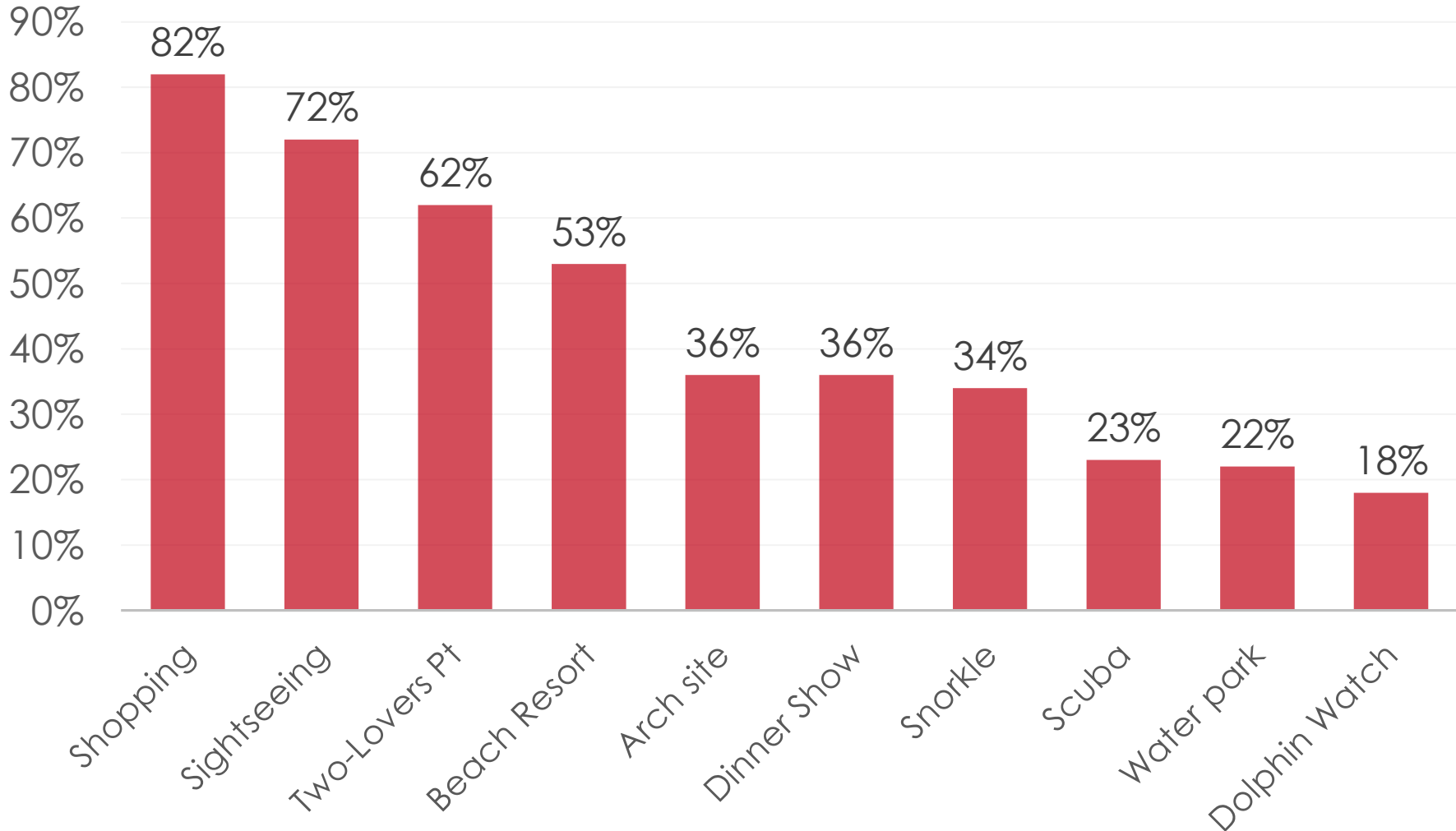


# NIGHT TOUR - SATISFACTION



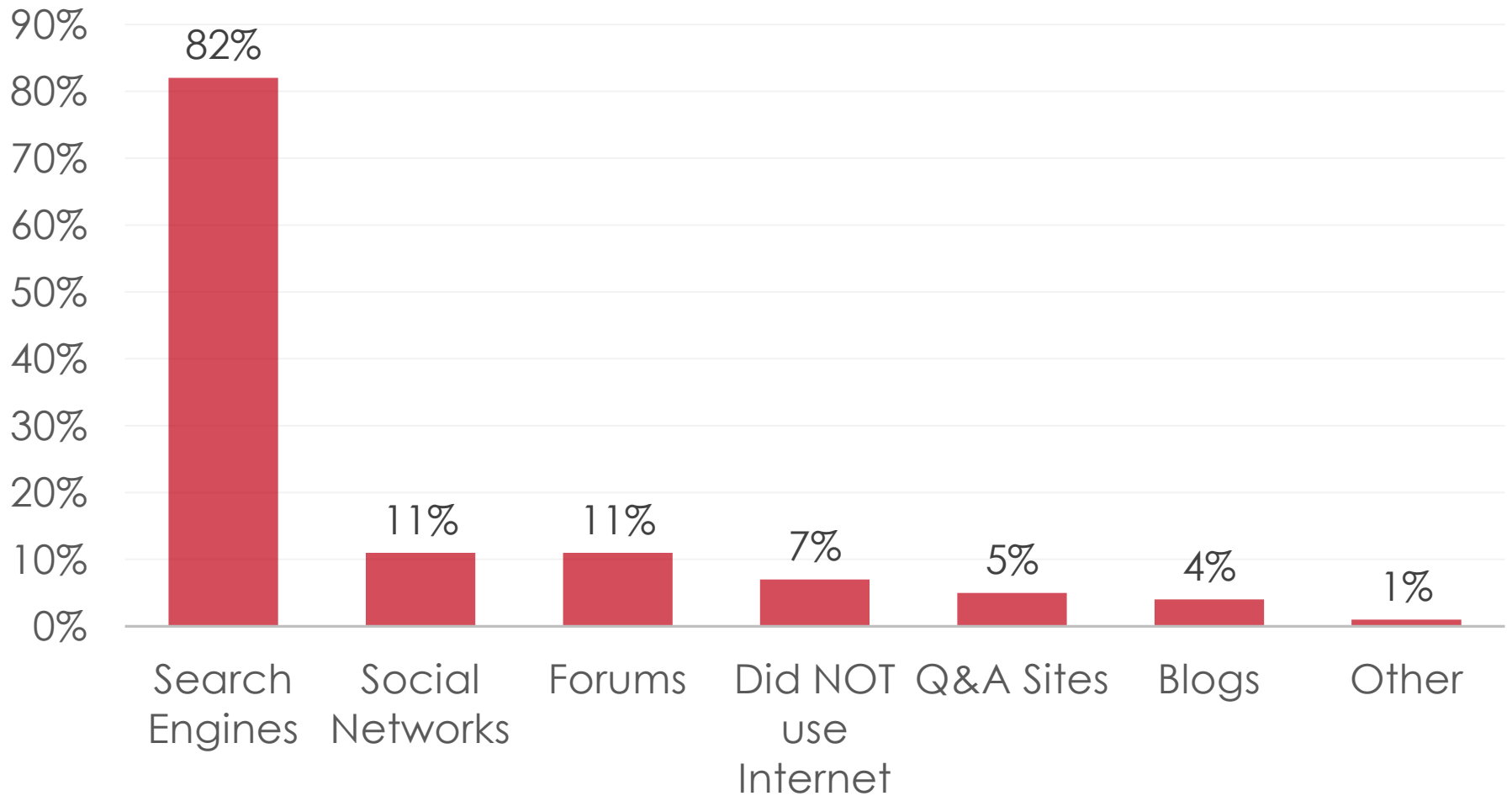


# Activities Participation (Top Responses)



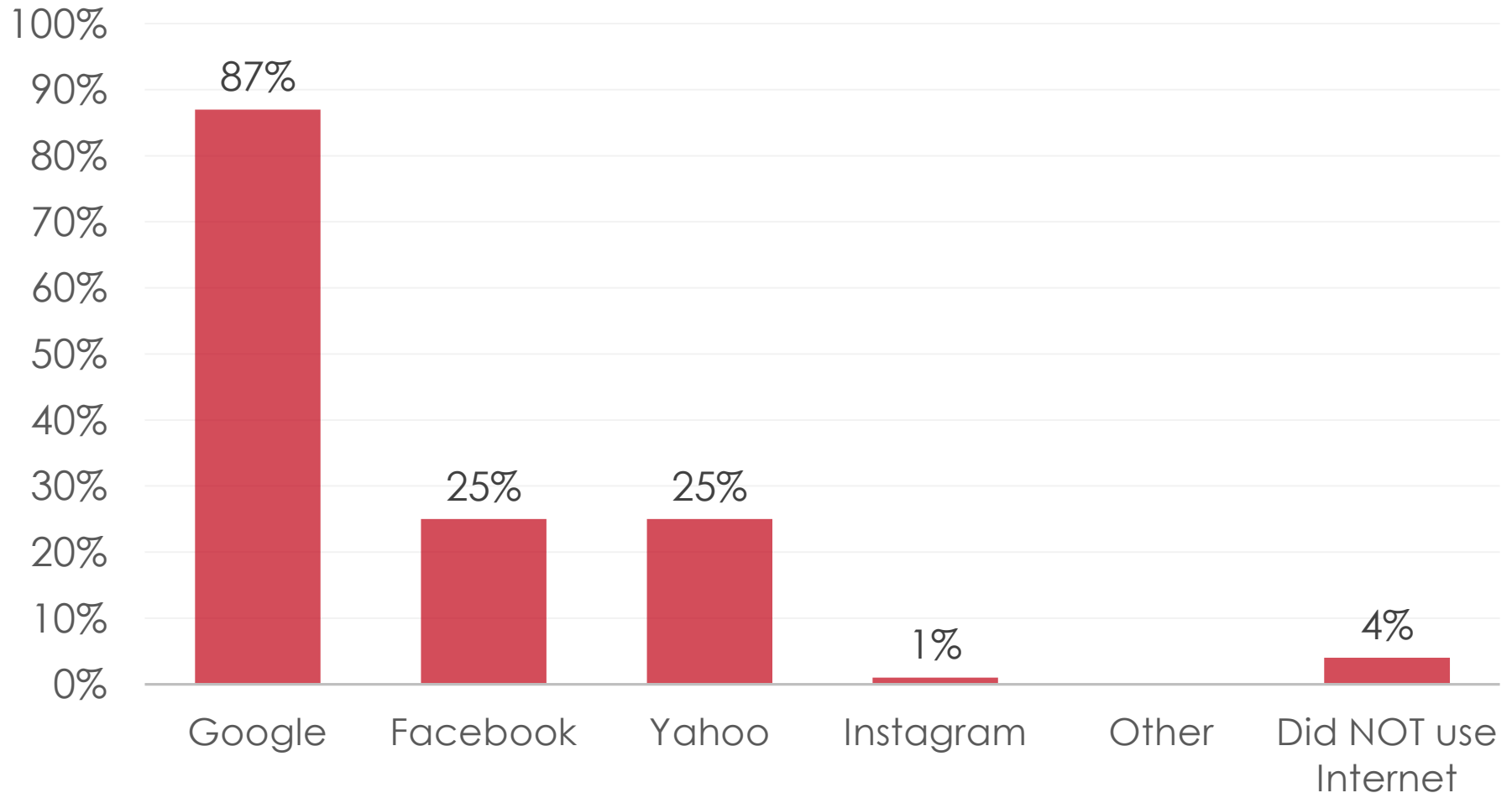
# SECTION 5 PROMOTIONS

# INTERNET- GUAM SOURCES OF INFORMATION



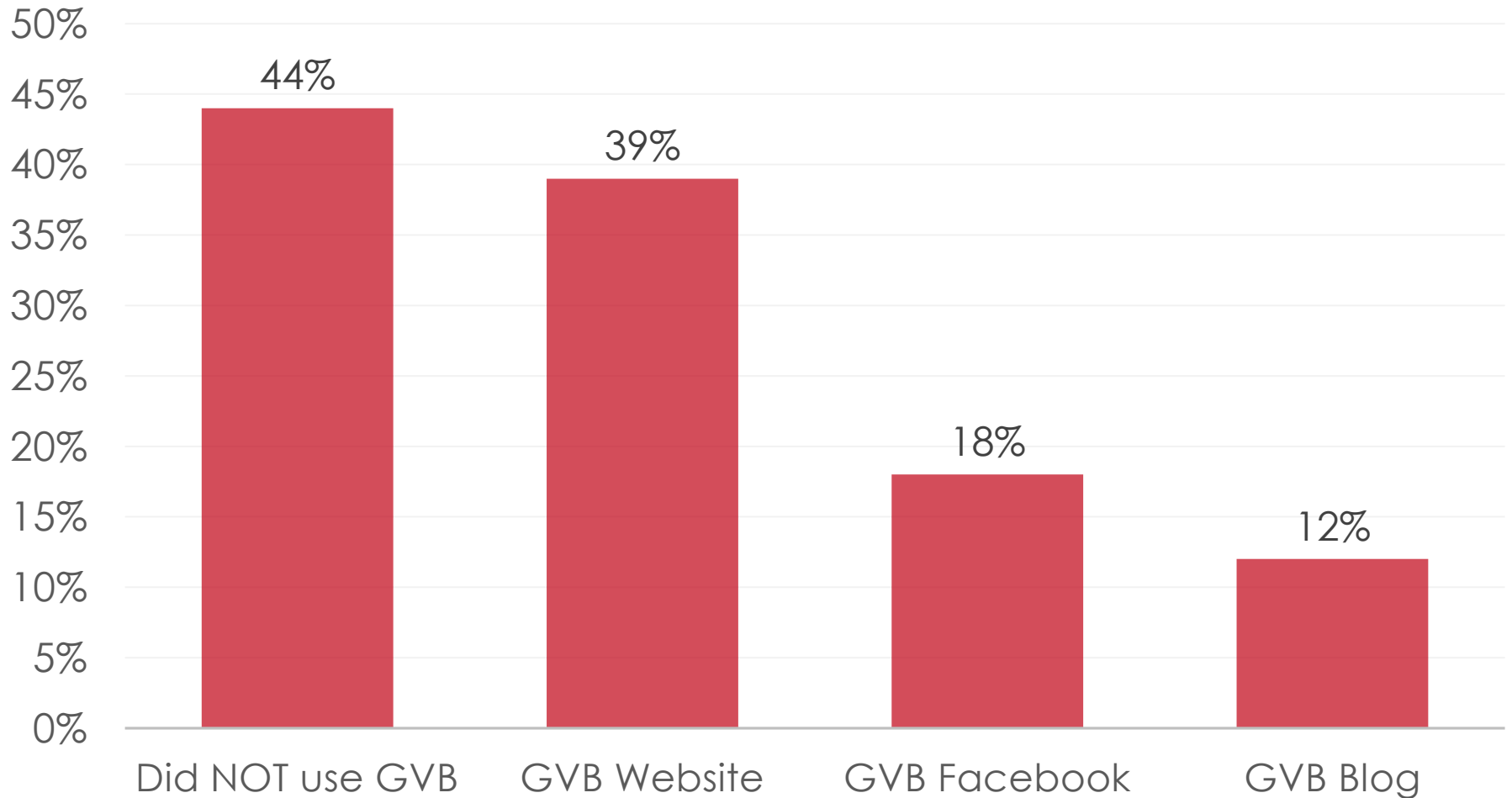
# INTERNET- SOURCES OF INFORMATION

## Things to do on Guam

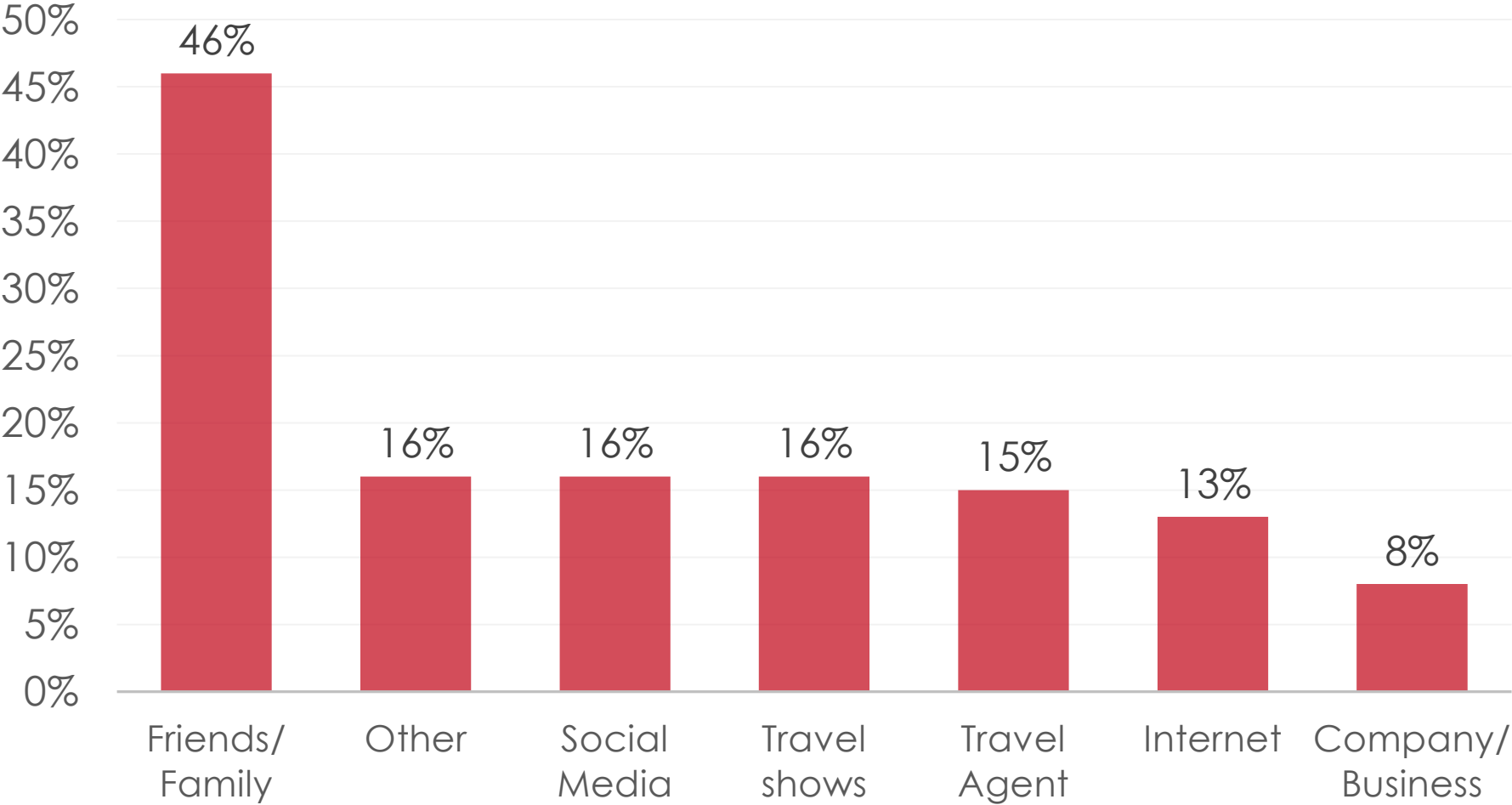


# INTERNET- SOURCES OF INFORMATION

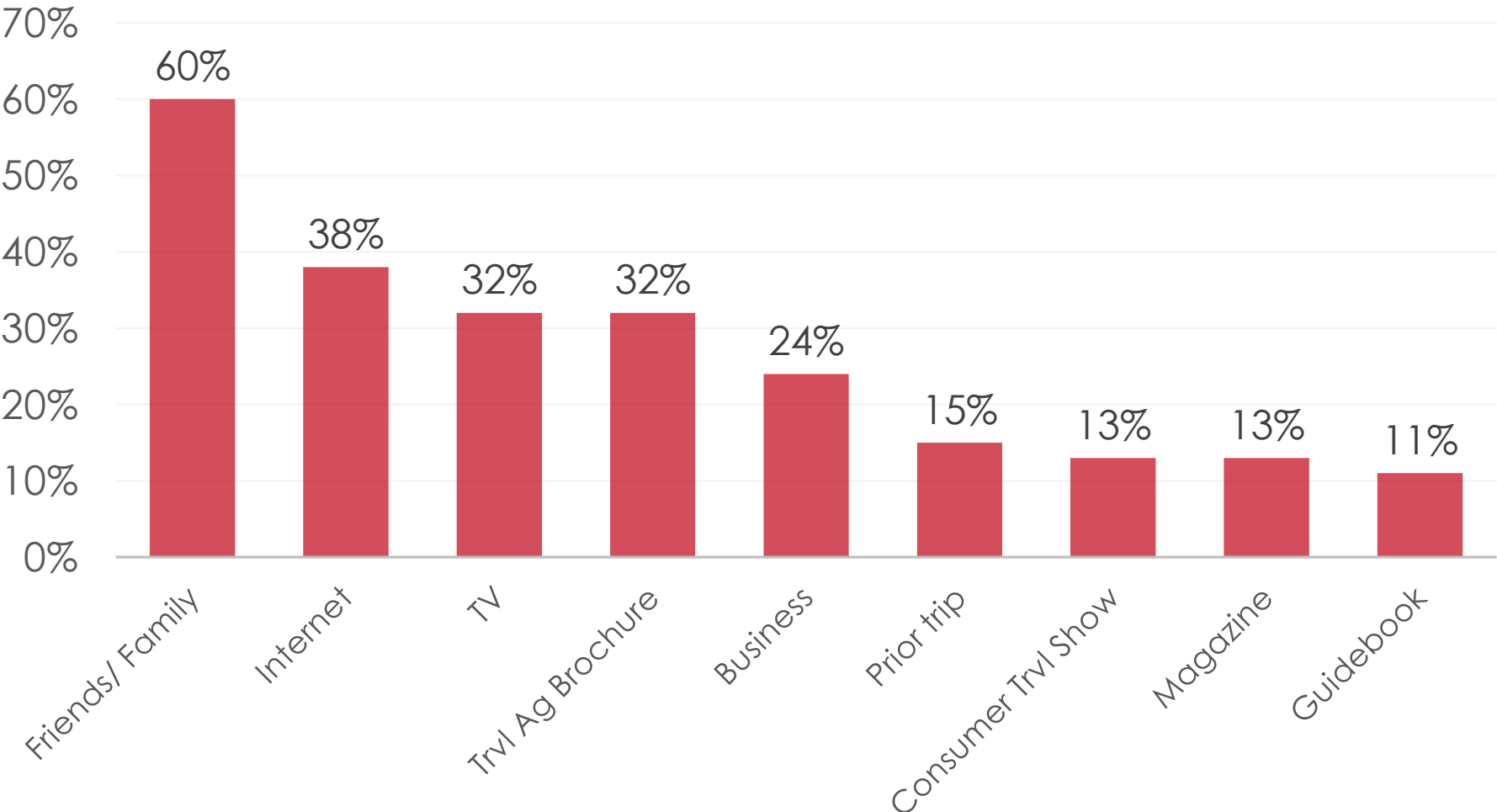
## GVB



# 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.

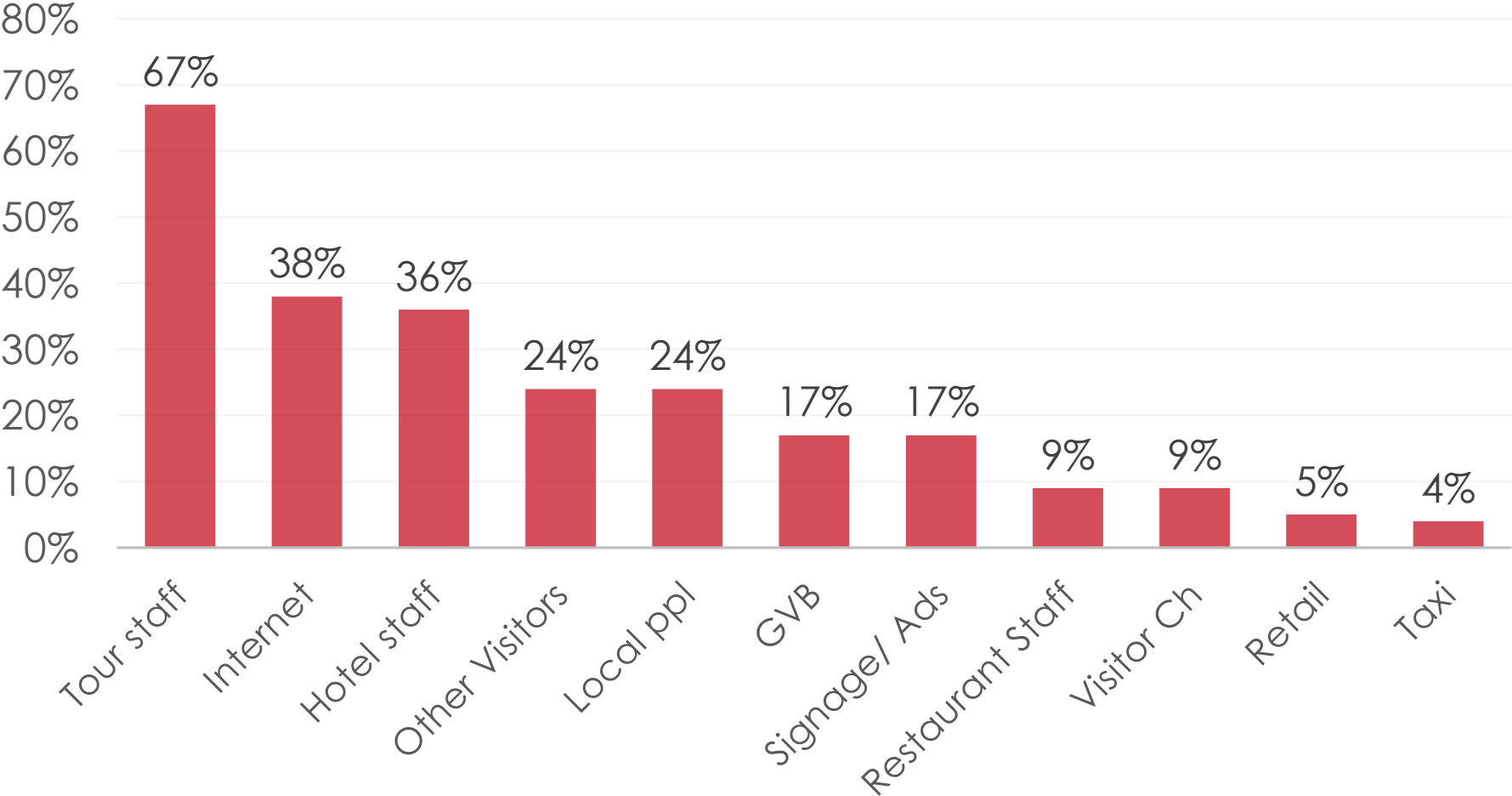
|    |                                 | TOTAL | MICE | SPORTS/<br>ADVENTURE | HONEYMOON |
|----|---------------------------------|-------|------|----------------------|-----------|
|    |                                 | -     | -    | -                    | -         |
| Q1 | Friend/ Relative                | 60%   | 25%  | 60%                  | 46%       |
|    | Internet                        | 38%   | 50%  | 39%                  | 46%       |
|    | Travel Agent Brochure           | 32%   | 25%  | 39%                  | 46%       |
|    | TV                              | 32%   | 25%  | 32%                  | 62%       |
|    | Co-Worker/ Company Trvl<br>Dept | 24%   | 100% | 22%                  | 15%       |
|    | Prior Trip                      | 15%   |      | 11%                  |           |
|    | Consumer Trvl Show              | 13%   |      | 11%                  | 23%       |
|    | Magazine (Consumer)             | 13%   |      | 15%                  | 8%        |
|    | Travel Guidebook-<br>Bookstore  | 11%   |      | 12%                  |           |
|    | Travel Trade Show               | 7%    |      | 6%                   |           |
|    | Newspaper                       | 6%    |      | 4%                   |           |
|    | GVB Promo                       | 4%    |      | 4%                   |           |
|    | Other                           | 3%    |      | 2%                   |           |
|    | Theater Ad                      | 1%    |      | 2%                   |           |
|    | GVB Office                      | 1%    |      | 2%                   |           |
|    | Radio                           | 1%    |      |                      |           |
|    | Total                           | 151   | 4    | 82                   | 13        |

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.

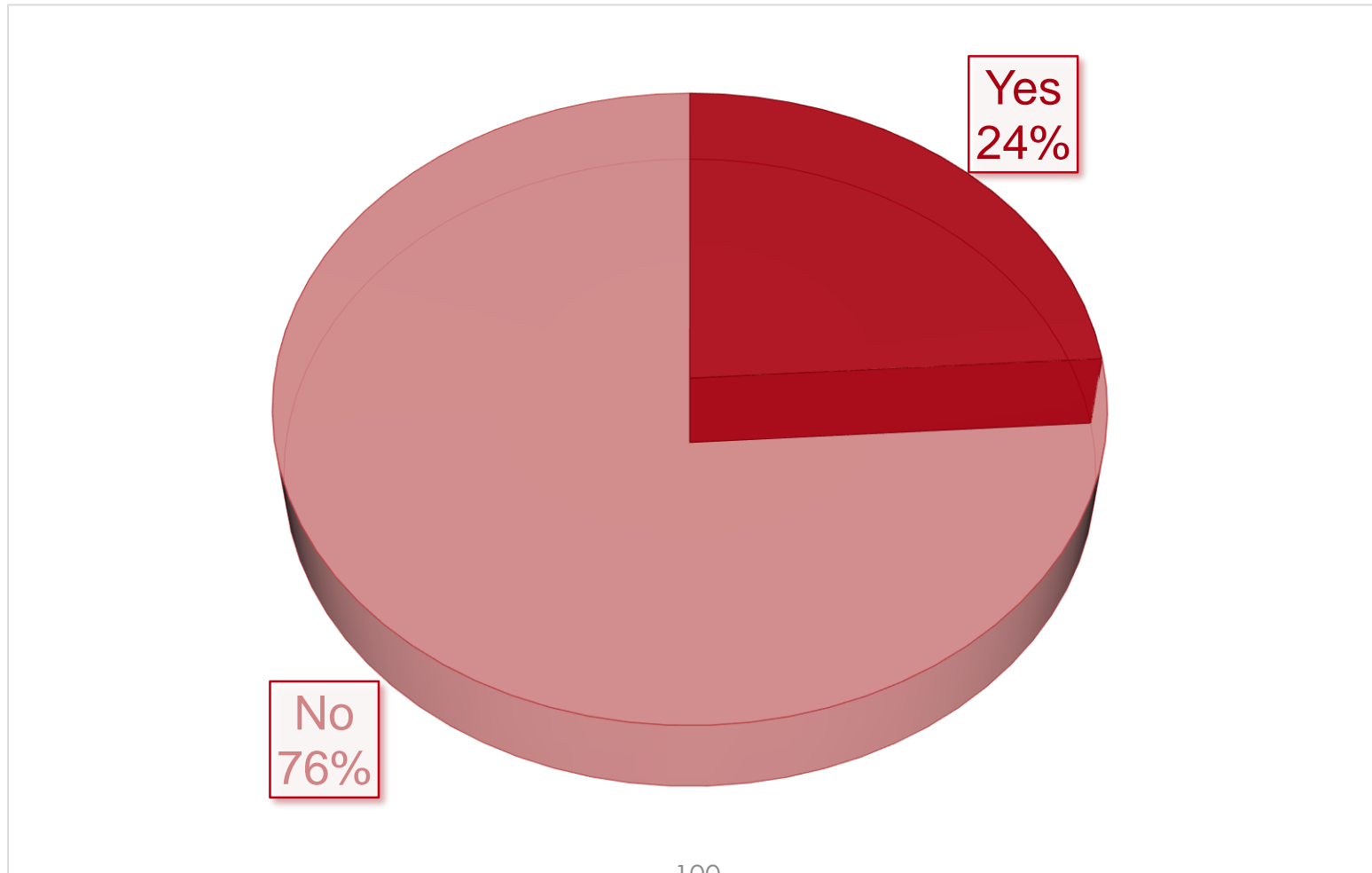
|    |                      | TOTAL | MICE | SPORTS/<br>ADVENTURE | HONEYMOON |
|----|----------------------|-------|------|----------------------|-----------|
|    |                      | -     | -    | -                    | -         |
| Q2 | Tour Staff           | 67%   | 100% | 72%                  | 85%       |
|    | Internet             | 38%   | 50%  | 36%                  | 62%       |
|    | Hotel Staff          | 36%   |      | 41%                  | 15%       |
|    | Other Visitors       | 24%   | 50%  | 22%                  | 31%       |
|    | Local Ppl            | 24%   | 25%  | 27%                  | 23%       |
|    | GVB                  | 17%   |      | 21%                  | 15%       |
|    | Signs/ Advertisement | 17%   |      | 14%                  | 15%       |
|    | Visitor Channel      | 9%    |      | 11%                  | 15%       |
|    | Restaurant Staff     | 9%    |      | 9%                   |           |
|    | Retail Staff         | 5%    |      | 7%                   |           |
|    | Taxi Driver          | 4%    | 25%  | 7%                   |           |
|    | Local Publication    | 3%    |      | 4%                   |           |
|    | Other                | 2%    |      |                      |           |
|    | Total                | 149   | 4    | 81                   | 13        |

Prepared by QMark Research

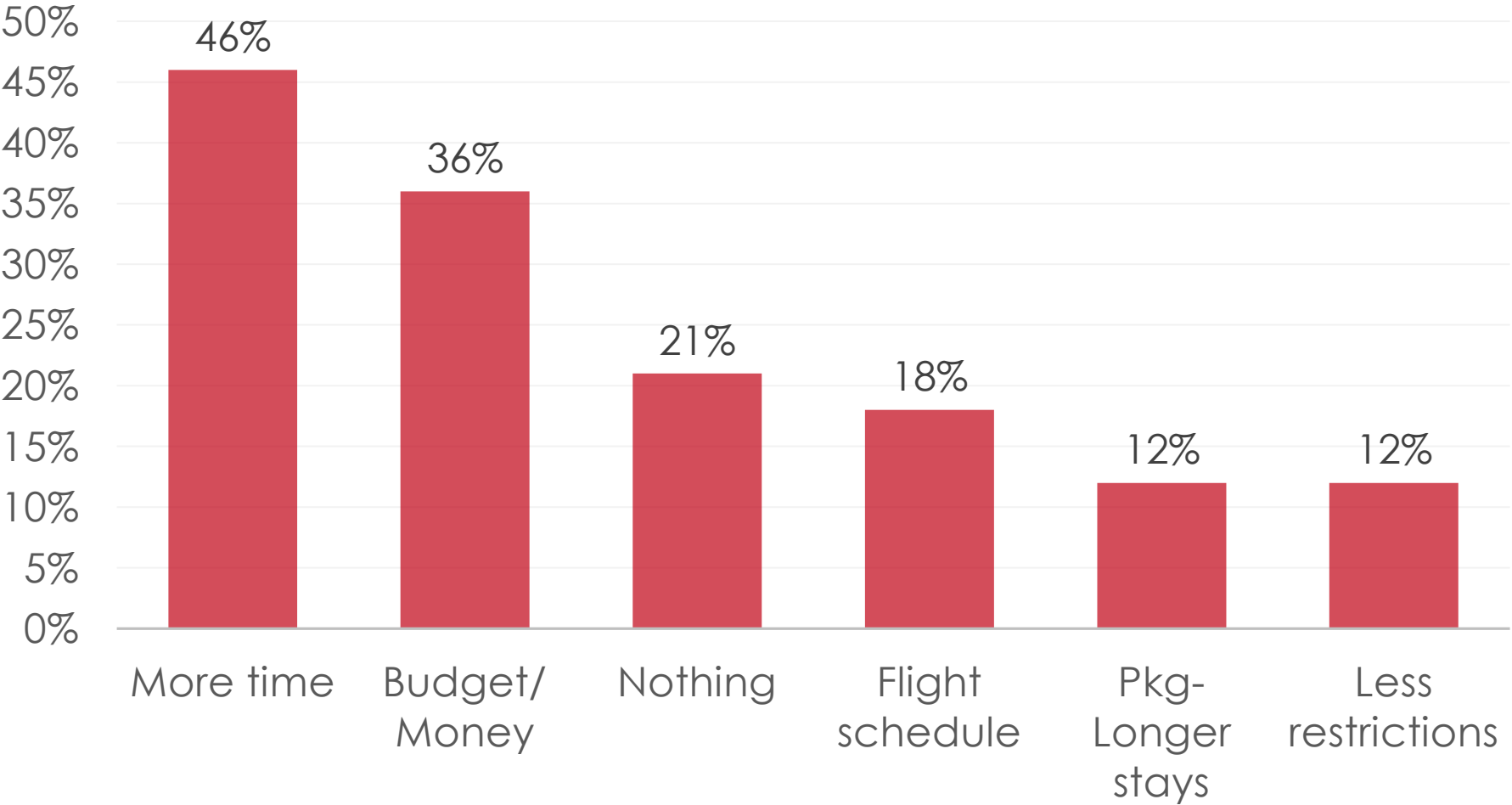
# SECTION 6

# FUTURE TRAVEL TO GUAM

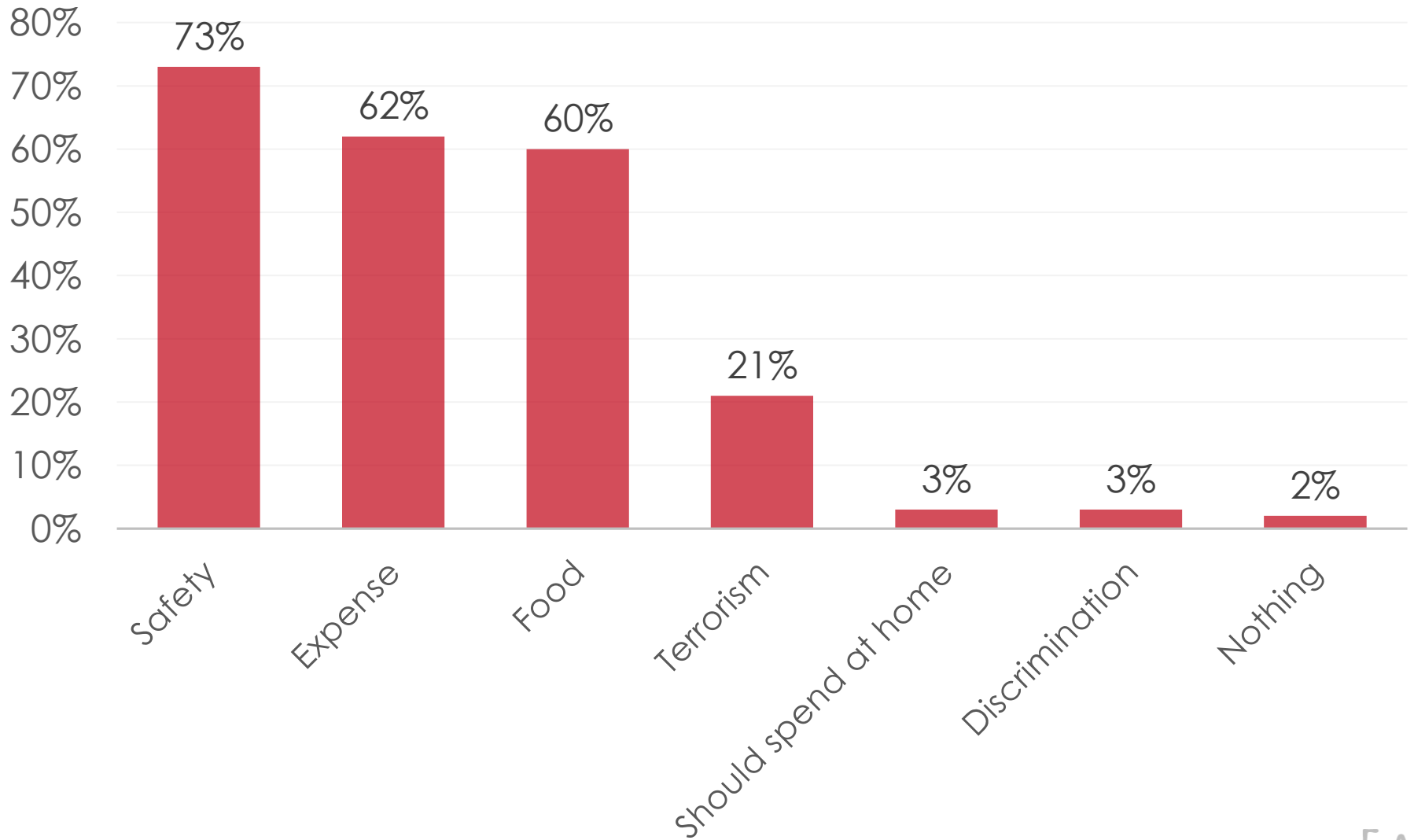
# Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



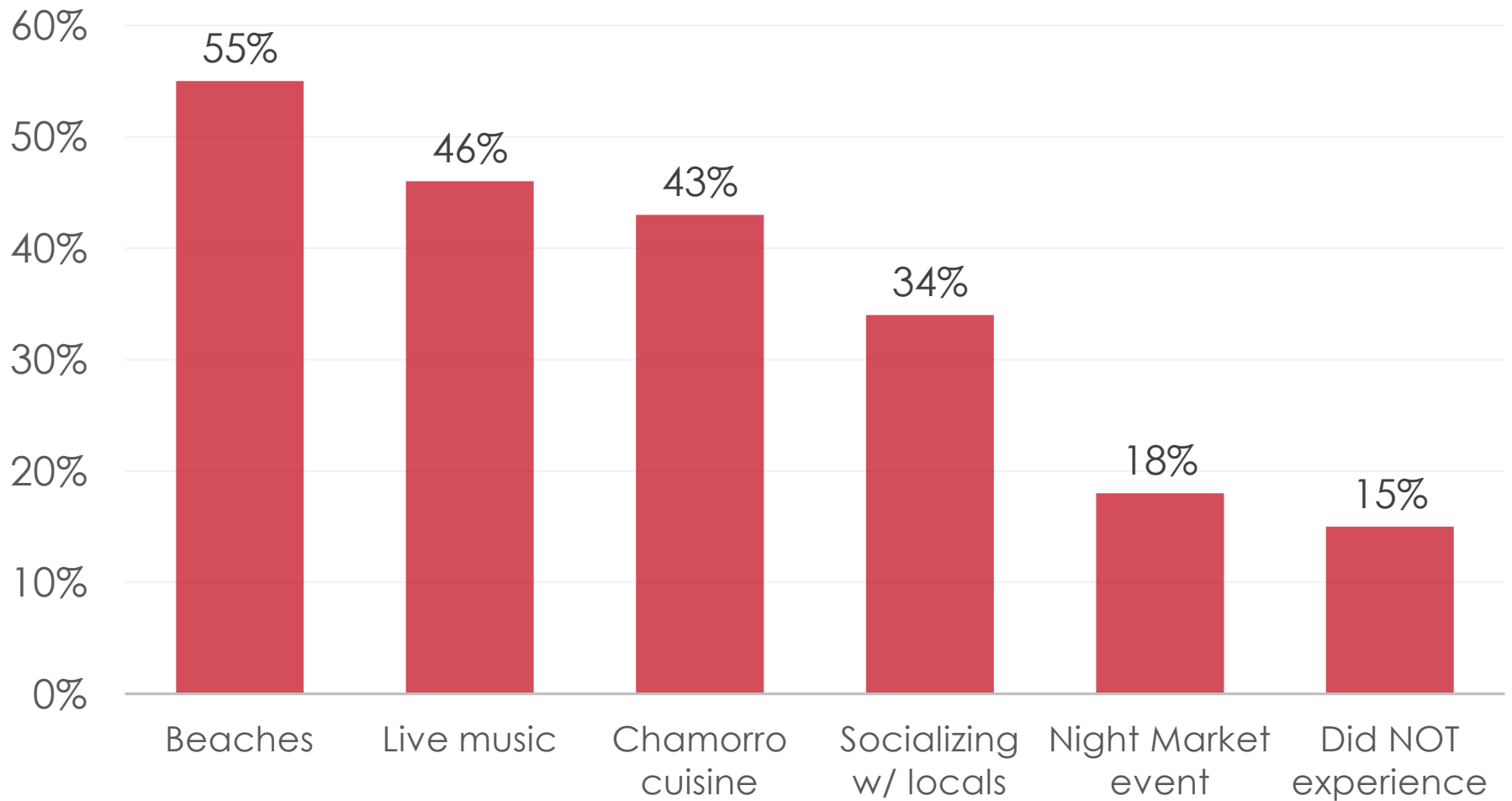
# FUTURE TRAVEL CONCERNS



# SECTION 7

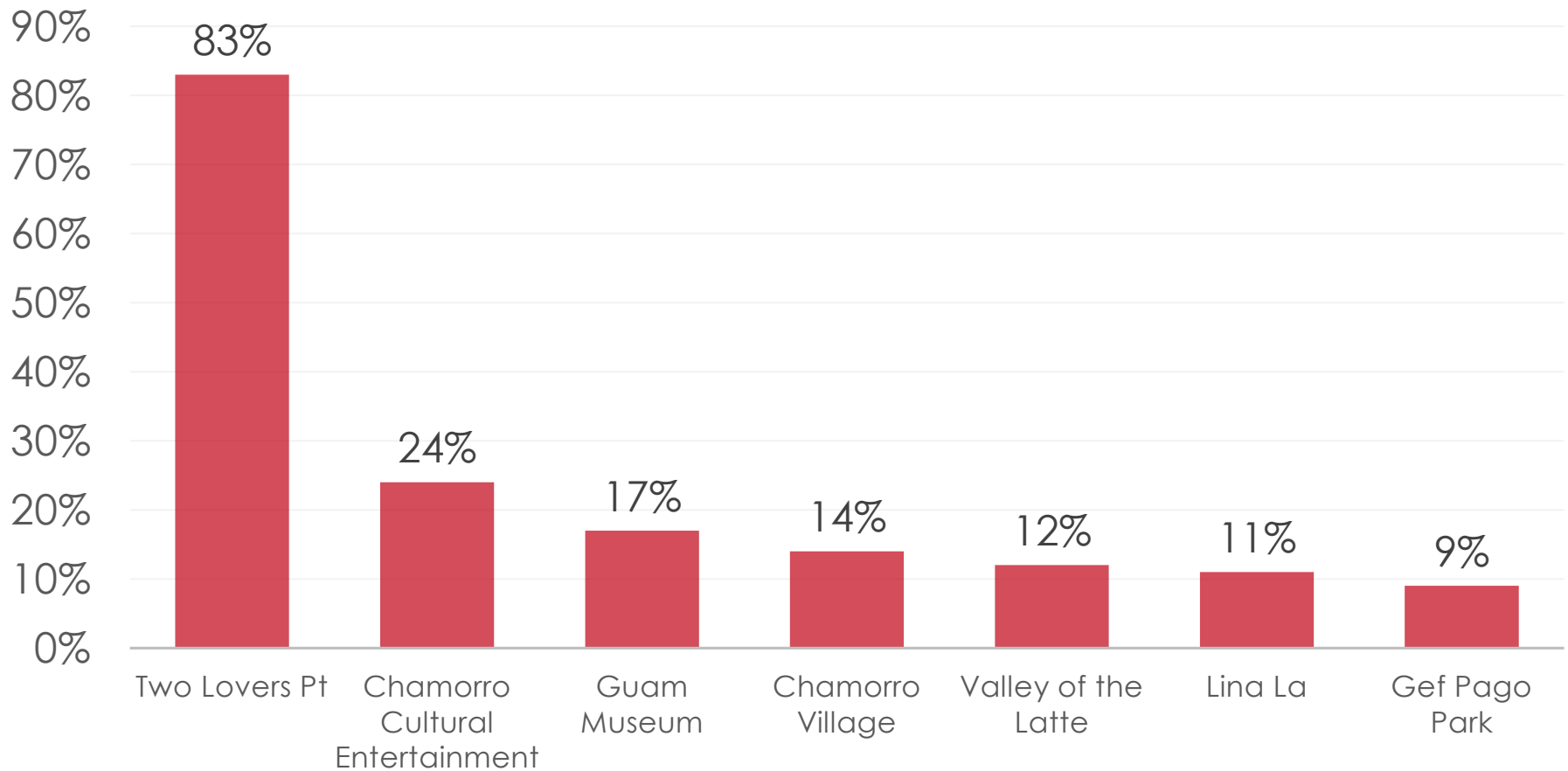
# GUAM CULTURE

# EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT

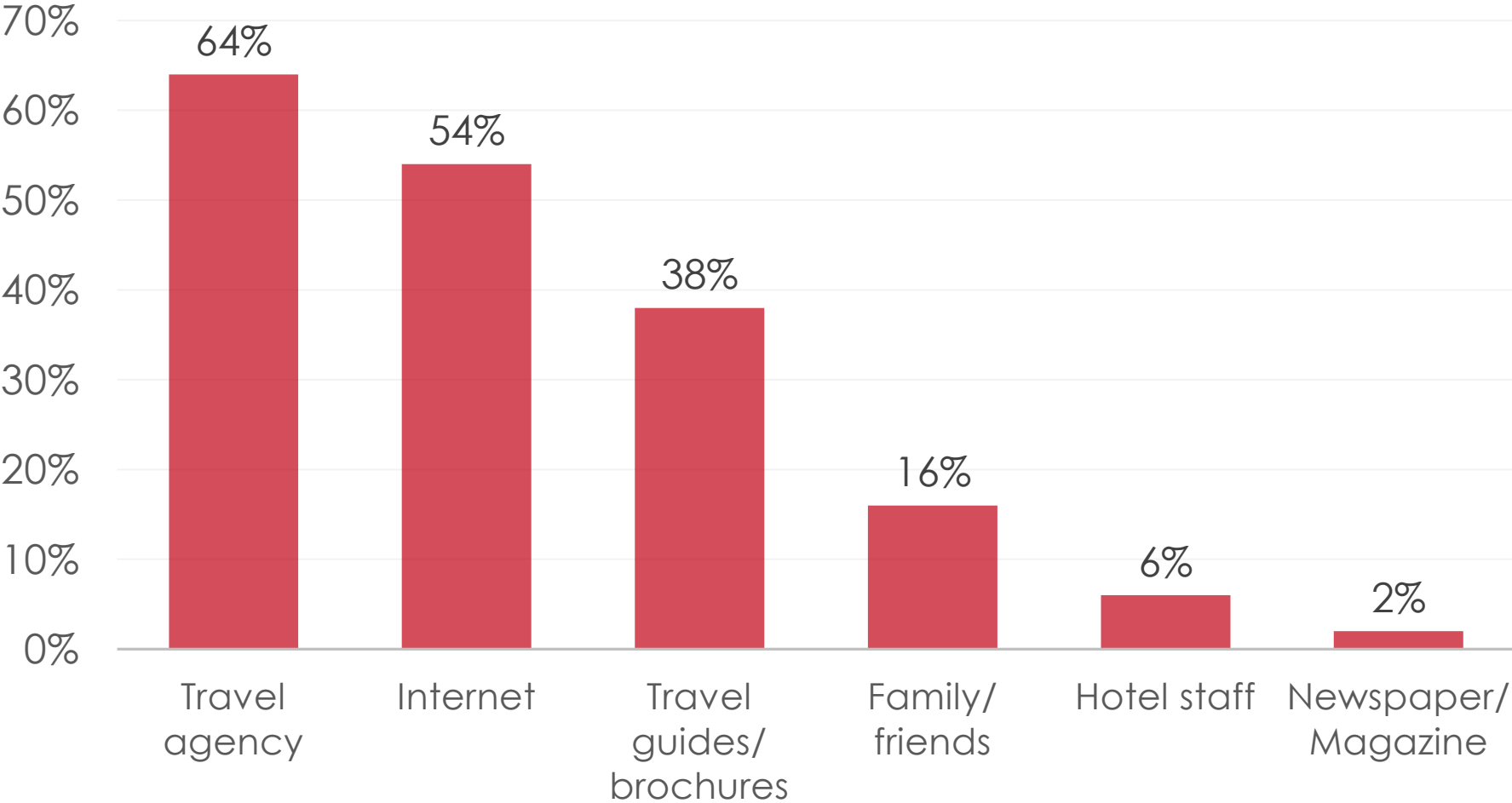




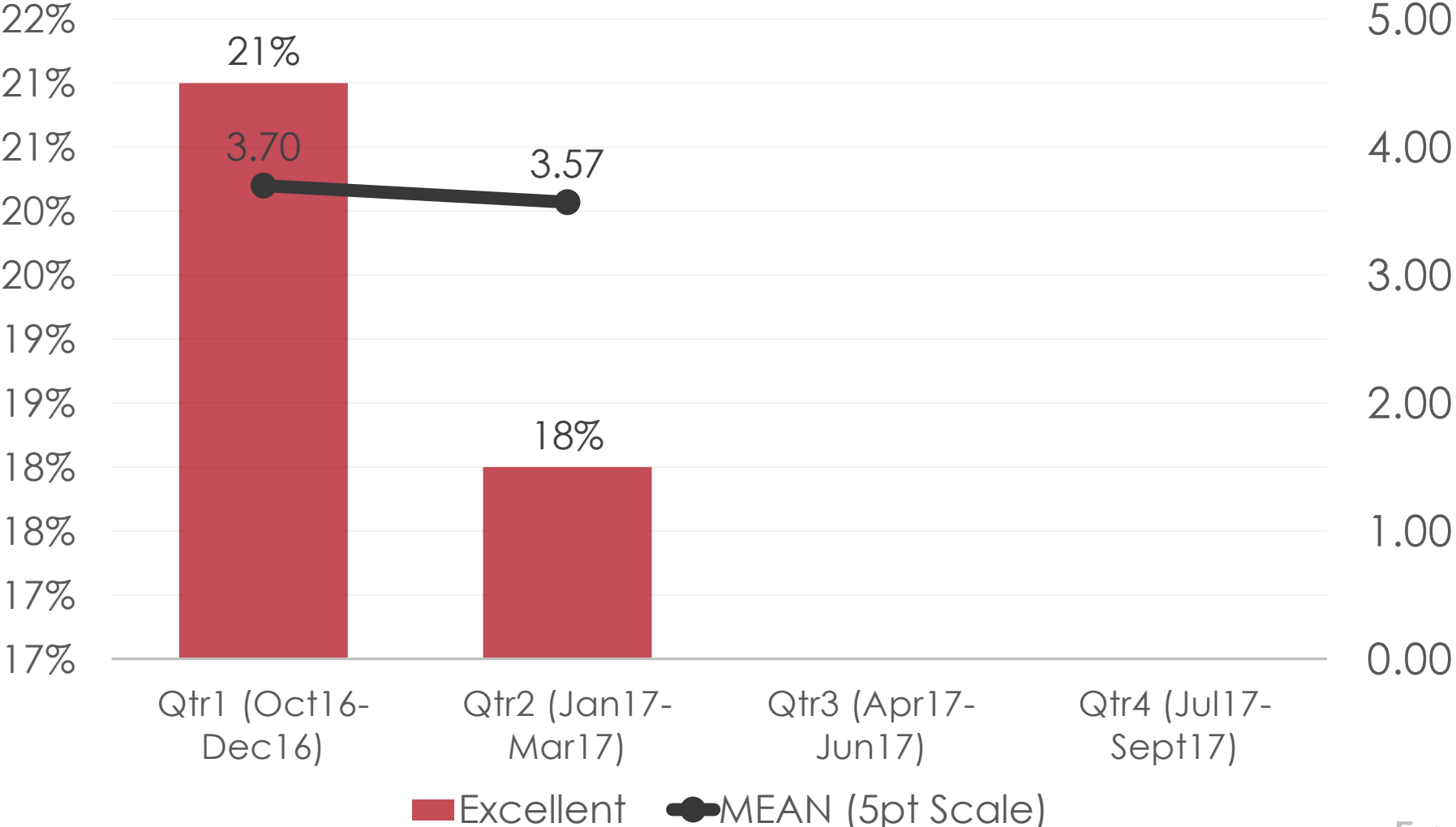
# EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



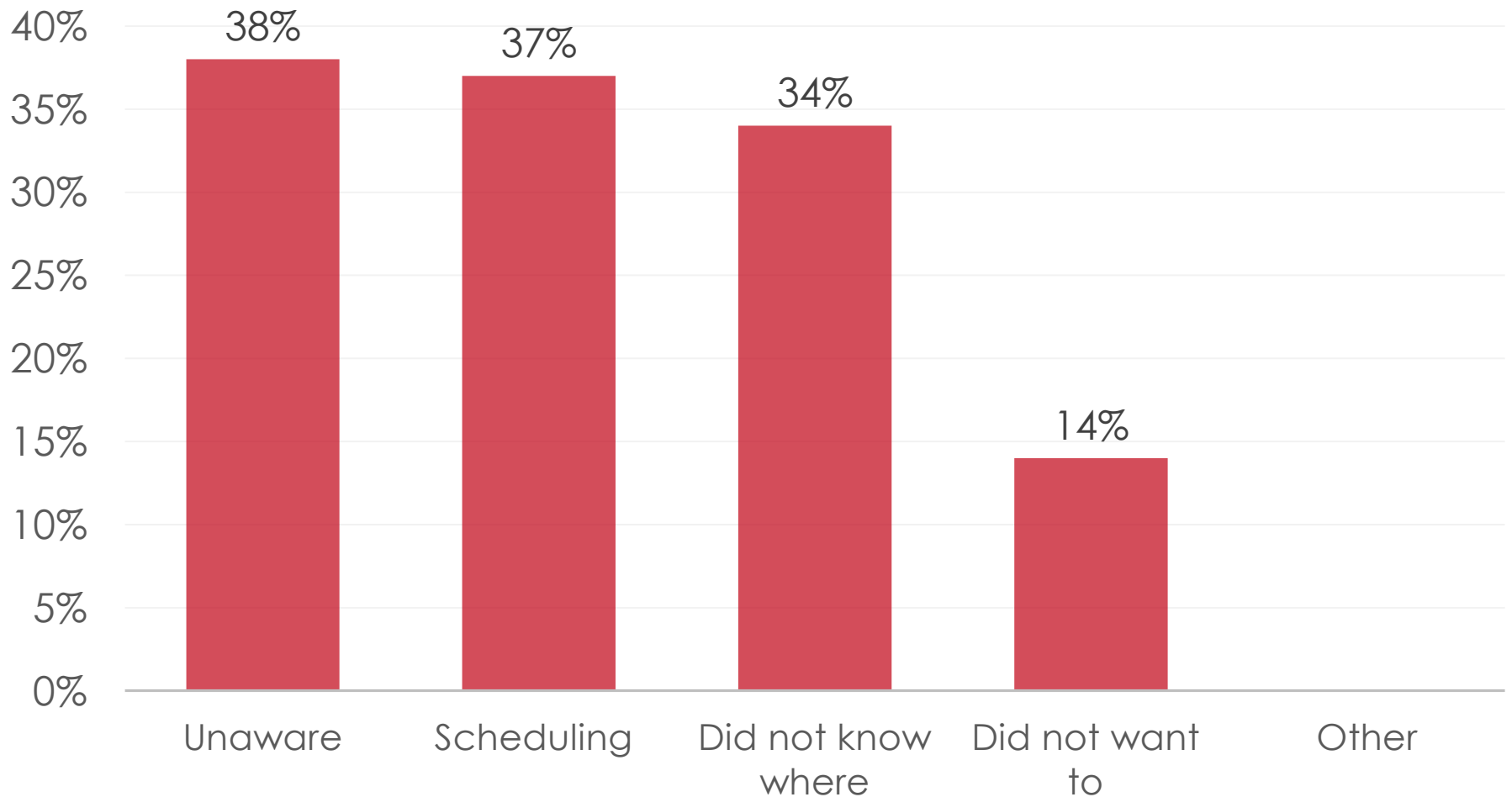
# SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



# SATISFACTION- CULTURAL ACTIVITY/EVENTS

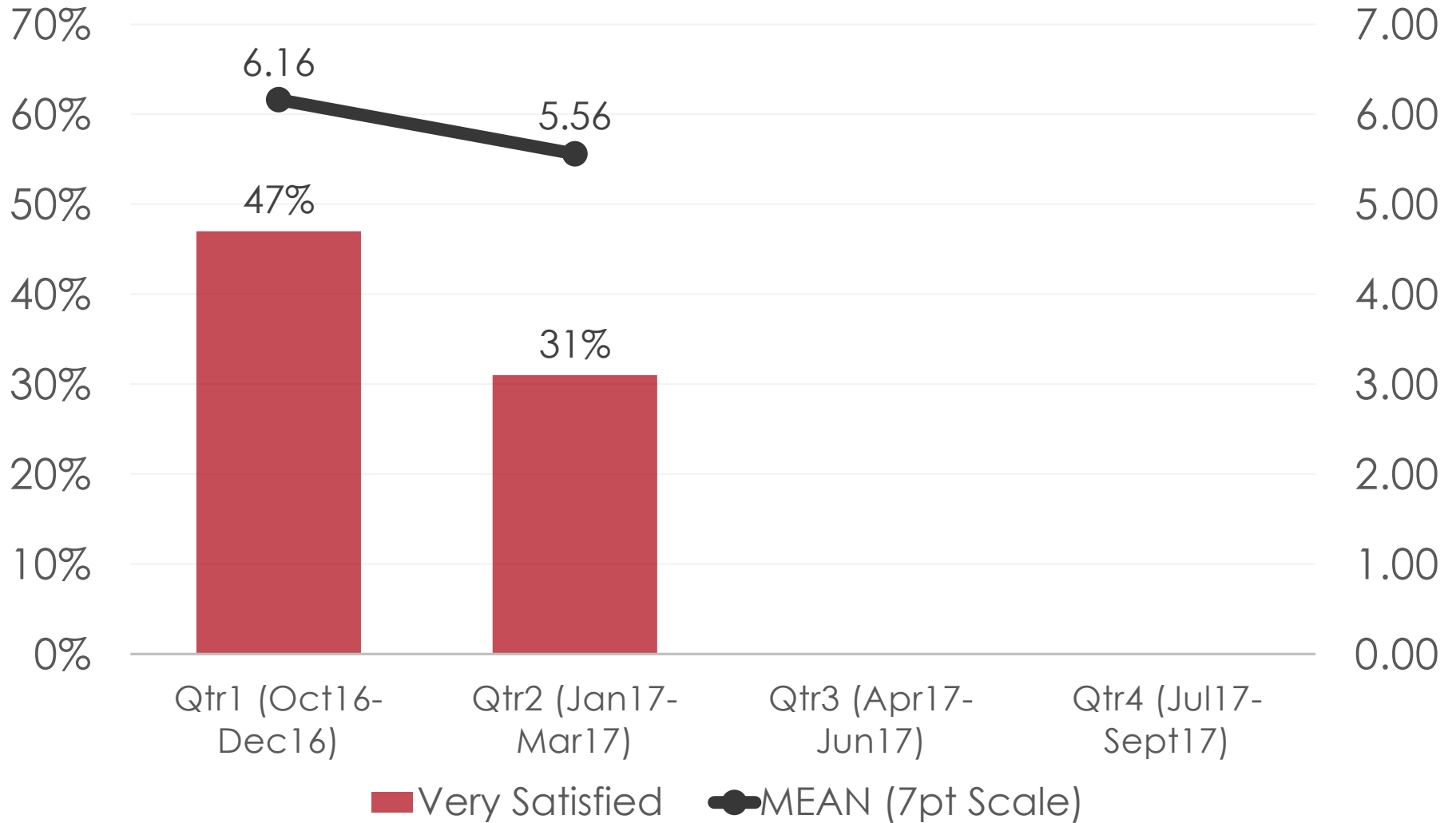


# OBSTACLES- CULTURAL ACTIVITY/EVENTS

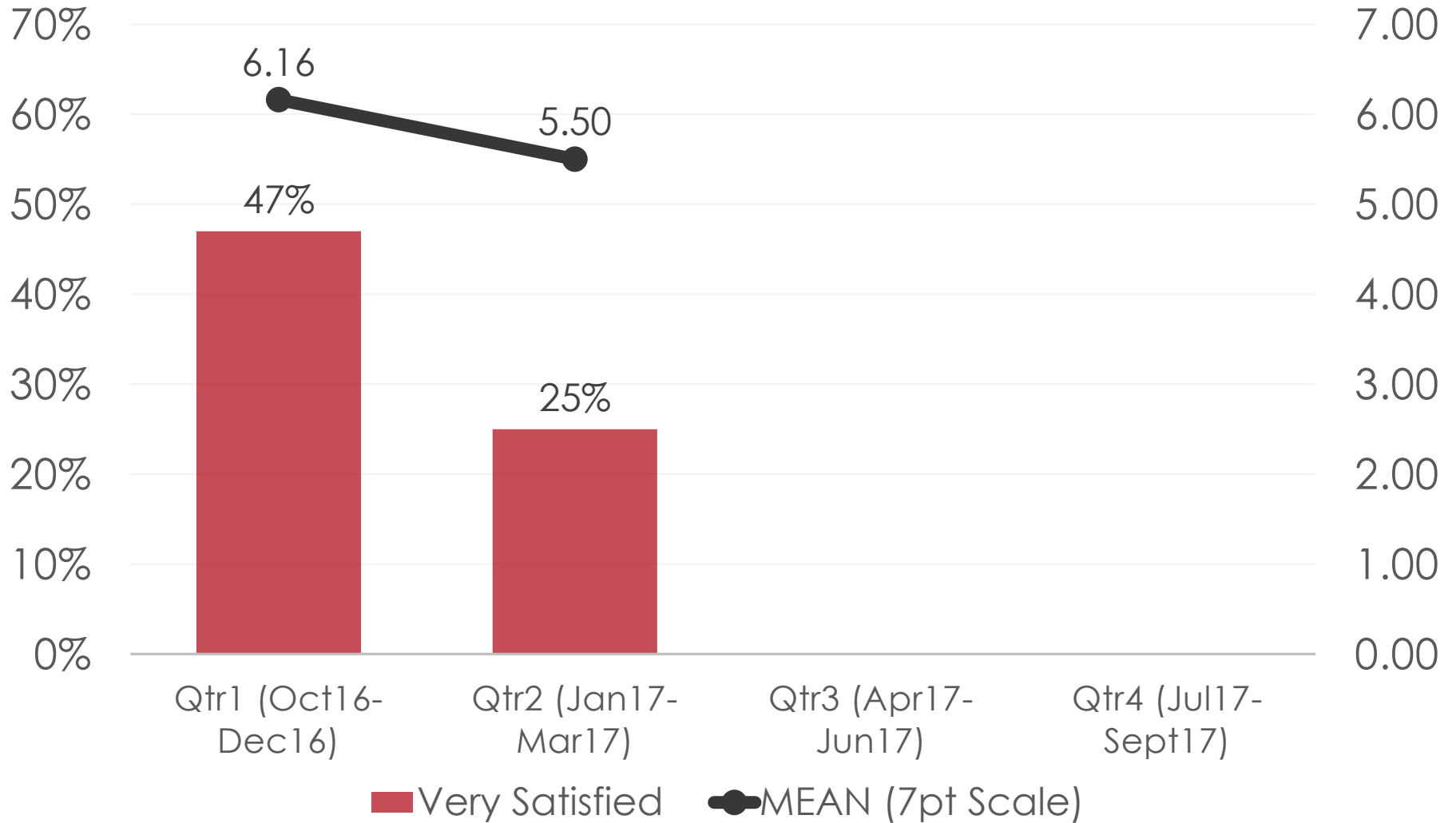


# WEDDING SATISFACTION

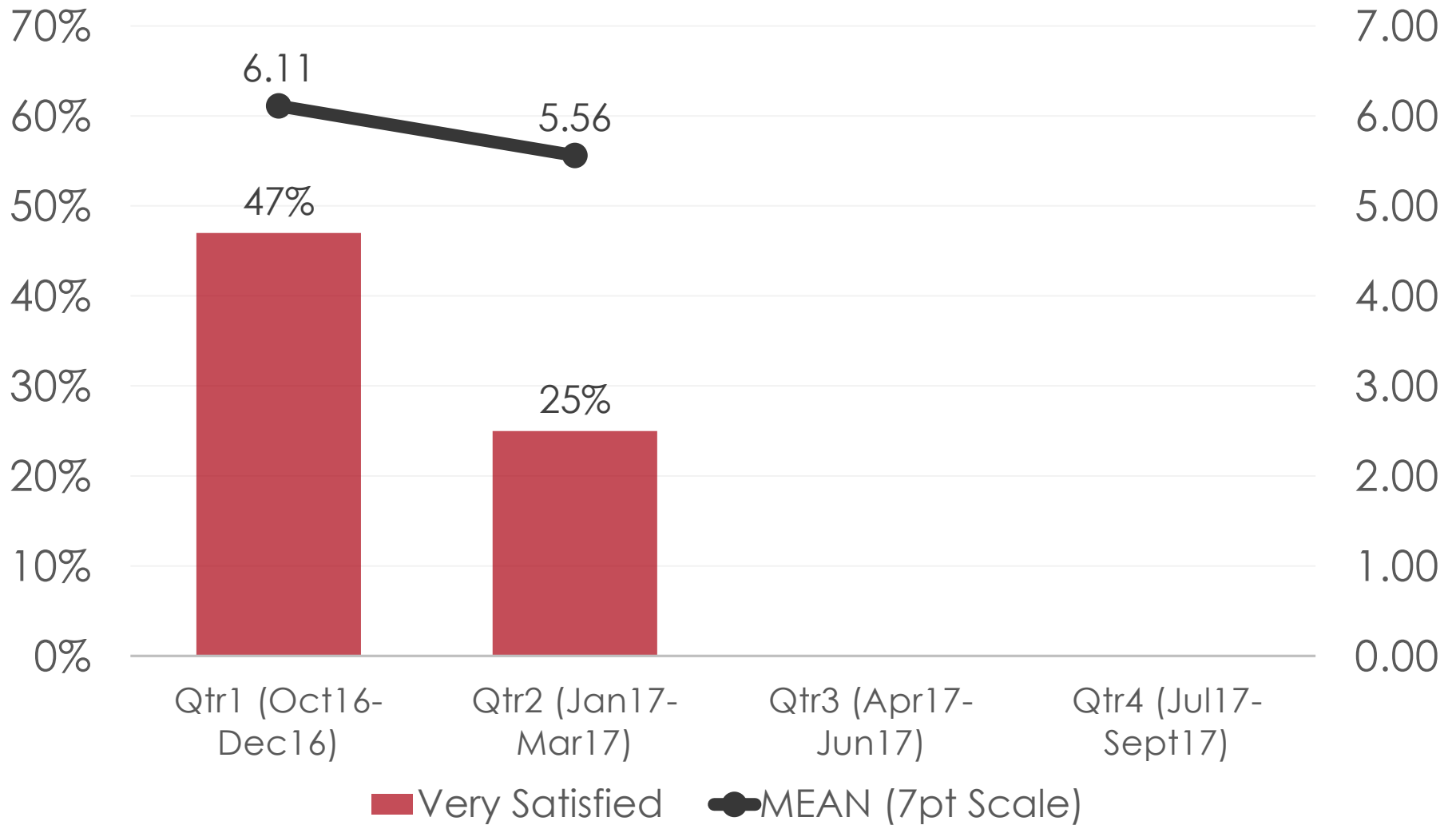
# Wedding Facility



# Wedding Facility Staff

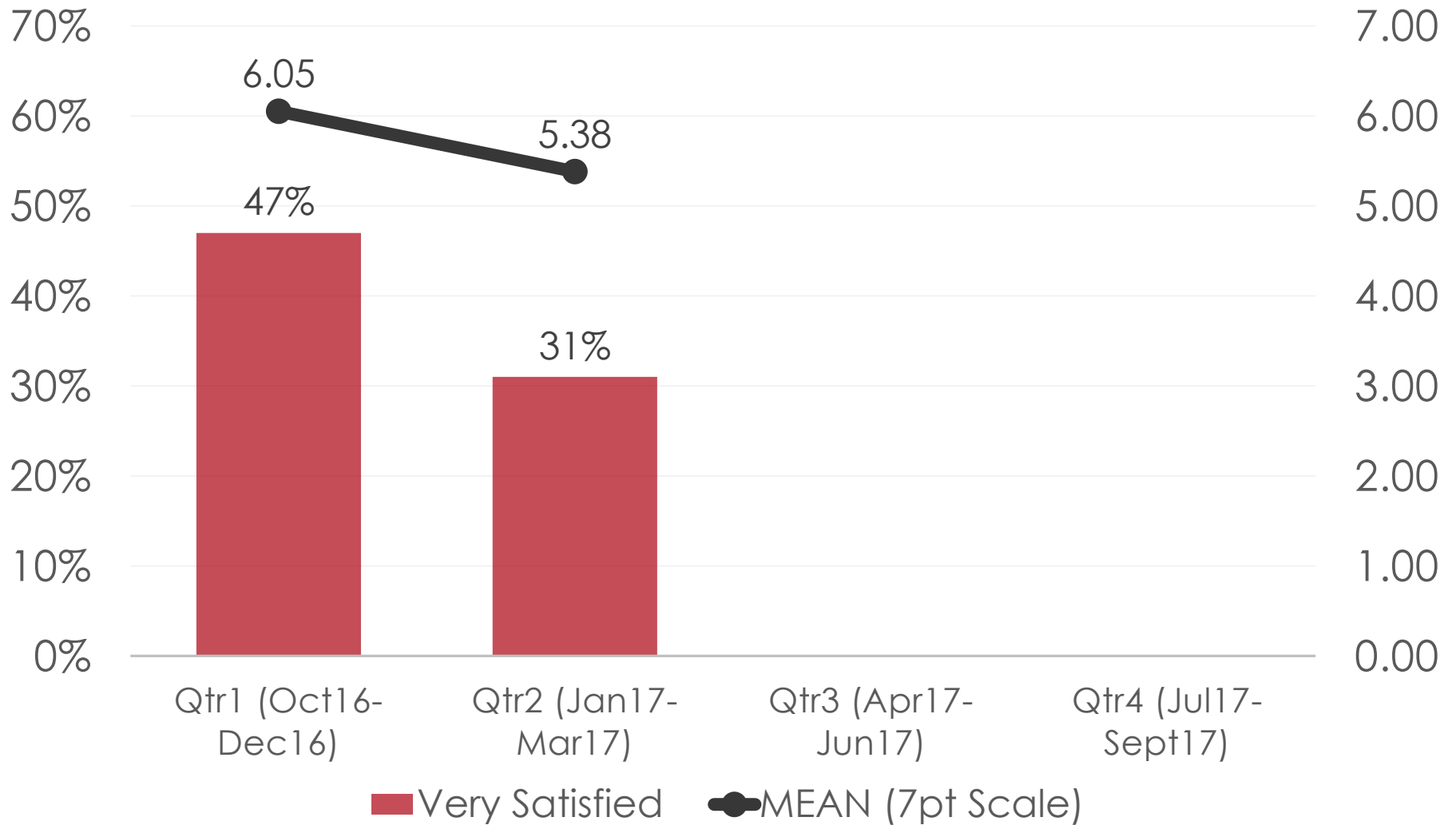


# Wedding Services





# Wedding Package



# 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, 1st, 2nd Qtr. and Overall 1-2 Qtr. 2017 |                 |                 |                                     |
|--|-----------------|-----------------|-------------------------------------|
| Drivers:   | 1st Qtr<br>rank | 2nd Qtr<br>rank | Combined<br>1-2 Qtr<br>2017<br>rank |
| Quality & Cleanliness of beaches & parks   |                 |                 |                                     |
| Ease of getting around   |                 |                 |                                     |
| Safety walking around at night   |                 | 5               |                                     |
| Quality of daytime tours   |                 |                 |                                     |
| Variety of daytime tours   |                 | 3               |                                     |
| Quality of nighttime tours   |                 |                 | 3                                   |
| Variety of nighttime tours   |                 |                 |                                     |
| Quality of shopping  |                 | 4               |                                     |
| Variety of shopping  | 3               |                 |                                     |
| Price of things on Guam  |                 |                 | 4                                   |
| Quality of hotel accommodations  |                 |                 |                                     |
| Quality/cleanliness of air, sky  |                 | 1               | 2                                   |
| Quality/cleanliness of parks   |                 |                 |                                     |
| Quality of landscape in Tumon  |                 |                 |                                     |
| Quality of landscape in Guam   |                 |                 |                                     |
| Quality of ground handler  | 1               | 2               | 1                                   |
| Quality/cleanliness of transportation vehicles   | 2               |                 | 5                                   |
| % of Per Person On Island Expenditures Accounted For                                   | 51.7%           | 63.5%           | 56.4%                               |
| NOTE: Only significant drivers are included.   |                 |                 |                                     |

# Drivers of Overall Satisfaction

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by five significant factors in the 2nd Quarter 2017 Period. By rank order they are:
  - **Quality/cleanliness of air, sky,**
  - **Quality of ground handler,**
  - **Variety of day time tours,**
  - **Quality of shopping, and**
  - **Safety walking around at night.**
- With all five factors the overall  $r^2$  is .635 meaning that **63.5% of overall satisfaction is accounted for by these factors.**

# Drivers – On-Isle Expenditures

|   | 1st Qtr | 2nd Qtr     | Combined<br>1-2 Qtr<br>2107 |
|---|---------|-------------|-----------------------------|
| Drivers:  | rank    | rank        | rank                        |
| Quality & Cleanliness of beaches & parks                |         |             |                             |
| Ease of getting around                                  |         |             |                             |
| Safety walking around at night                          |         |             |                             |
| Quality of daytime tours                                |         |             |                             |
| Variety of daytime tours                                |         |             |                             |
| Quality of nighttime tours                              |         |             |                             |
| Variety of nighttime tours                              |         |             |                             |
| Quality of shopping                                     | 1       |             | 1                           |
| Variety of shopping                                     |         |             |                             |
| Price of things on Guam                                 |         |             |                             |
| Quality of hotel accommodations                         |         |             |                             |
| Quality/cleanliness of air, sky                         |         |             |                             |
| Quality/cleanliness of parks                            |         |             |                             |
| Quality of landscape in Tumon                           |         |             |                             |
| Quality of landscape in Guam                            |         |             |                             |
| Quality of ground handler                               |         |             |                             |
| Quality/cleanliness of transportation vehicles          |         |             |                             |
| % of Per Person On Island Expenditures<br>Accounted For | 2.4%    | <b>0.0%</b> | 1.4%                        |
| NOTE: Only significant drivers are included.            |         |             |                             |

# Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Taiwan visitors on Guam is driven by no significant factor in the 2<sup>nd</sup> Quarter 2017 period.