



Guam Visitors Bureau

U.S. Visitor Tracker Exit Profile & Market Segmentation Report

FY2019 - QTR.3 (APR-JUN 2019)

[ANTHOLOGY®]
RESEARCH



Background and Methodology

- All surveys were partially interviewer administered. Upon completion of the surveys, Anthology's professional U.S. speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent was present.
- A total of 133 departing U.S. 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 133 is +/- 8.50 percentage points with a 95% confidence level. That is, if all U.S. 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 +/- 8.50 percentage points.

Objectives

- To monitor the effectiveness of the U.S. seasonal campaigns in attracting U.S. visitors, refresh certain baseline data, to better understand the nature and economic value or impact of each of the targeted segments in the U.S. marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

Key Highlighted Segments

- The specific objectives were:
 - To identify the most significant factors affecting overall visitor satisfaction.
 - To identify (for all visitors from the U.S.) the most important determinants of on-island spending.

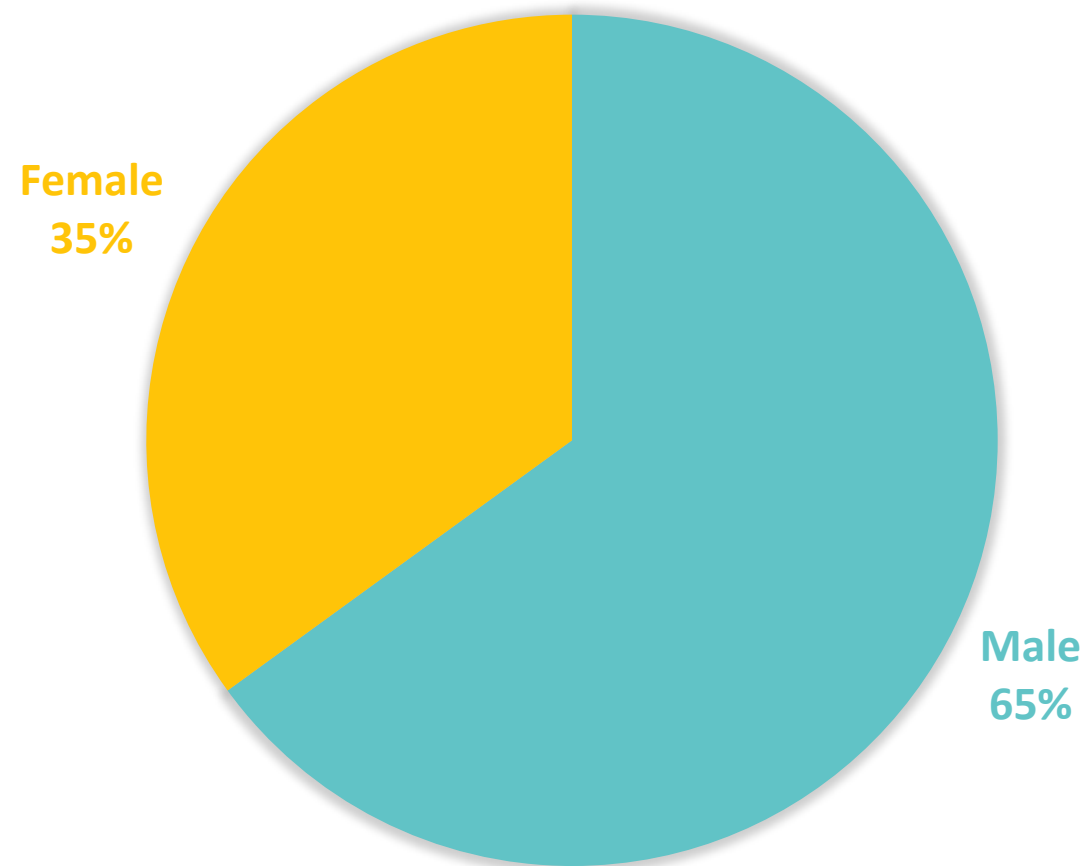


SECTION 1

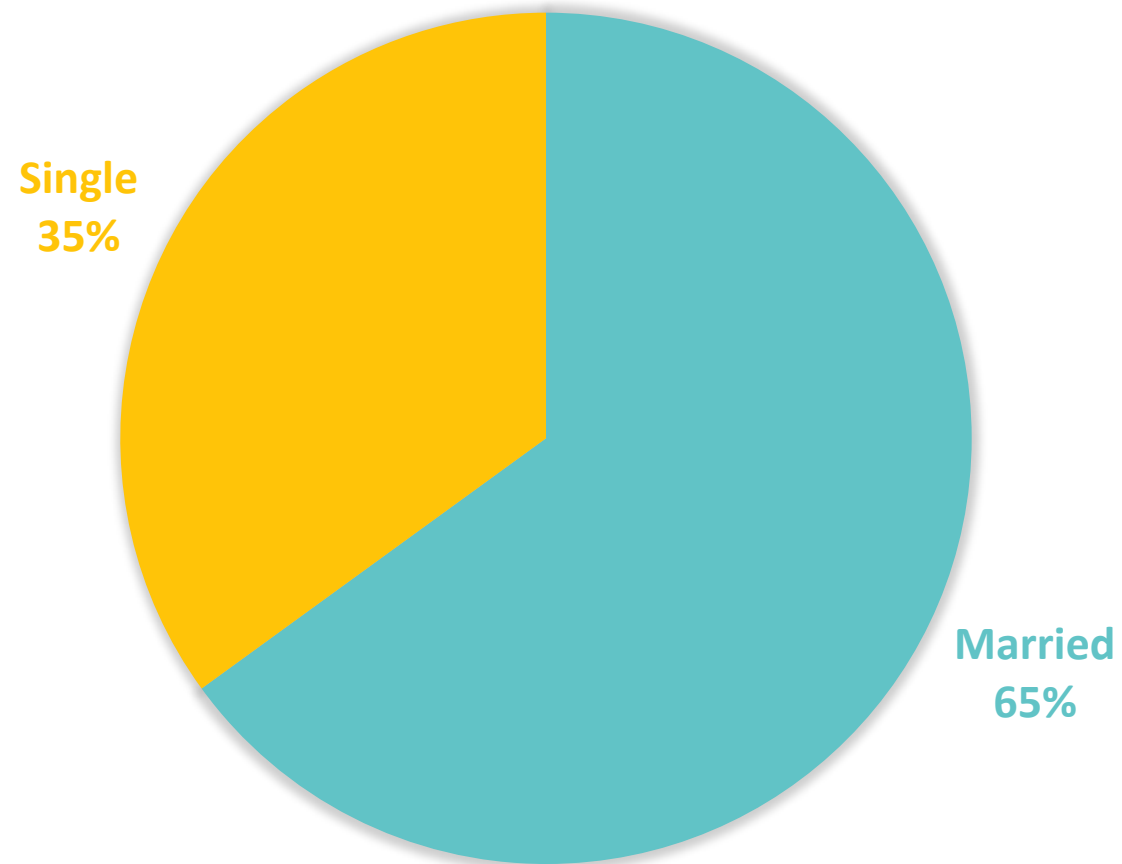
PROFILE OF RESPONDENTS



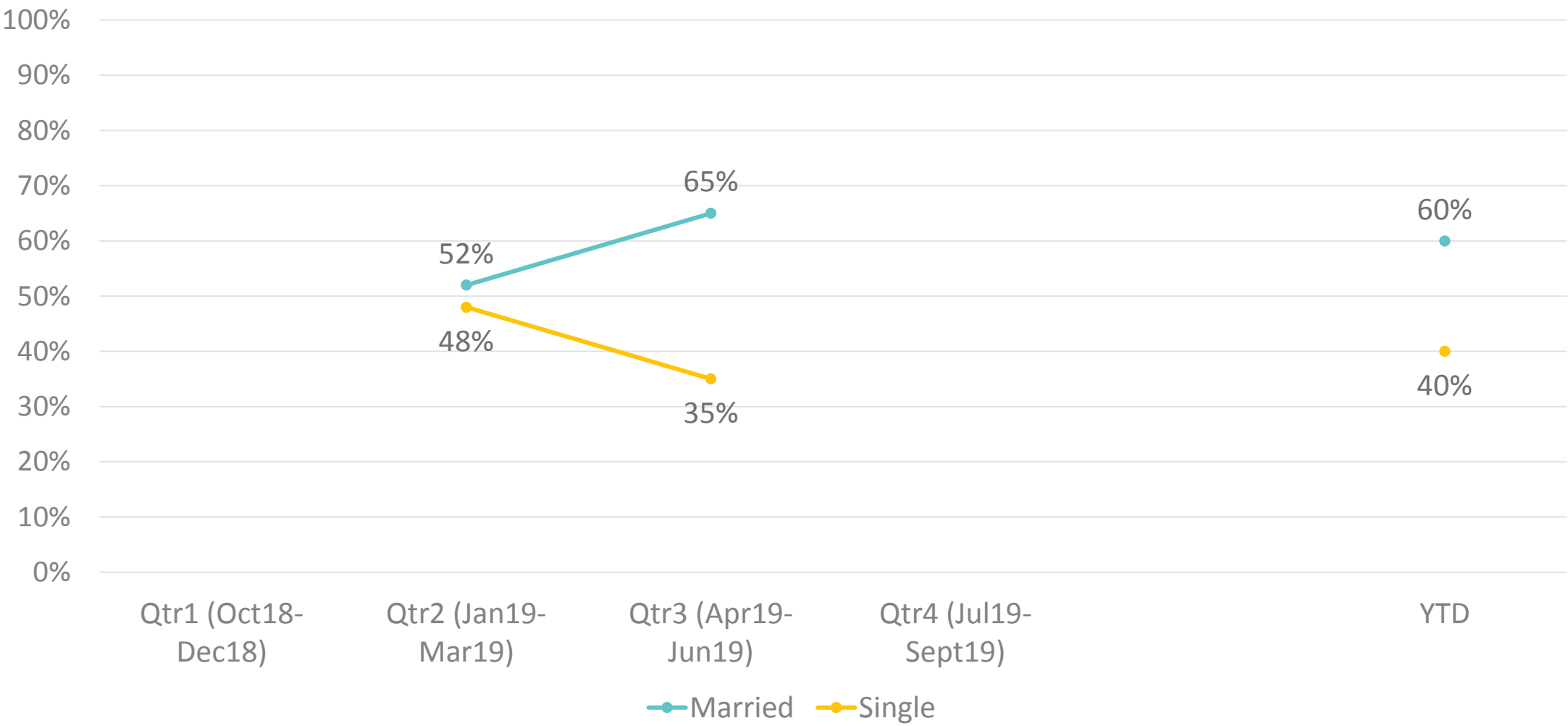
GENDER



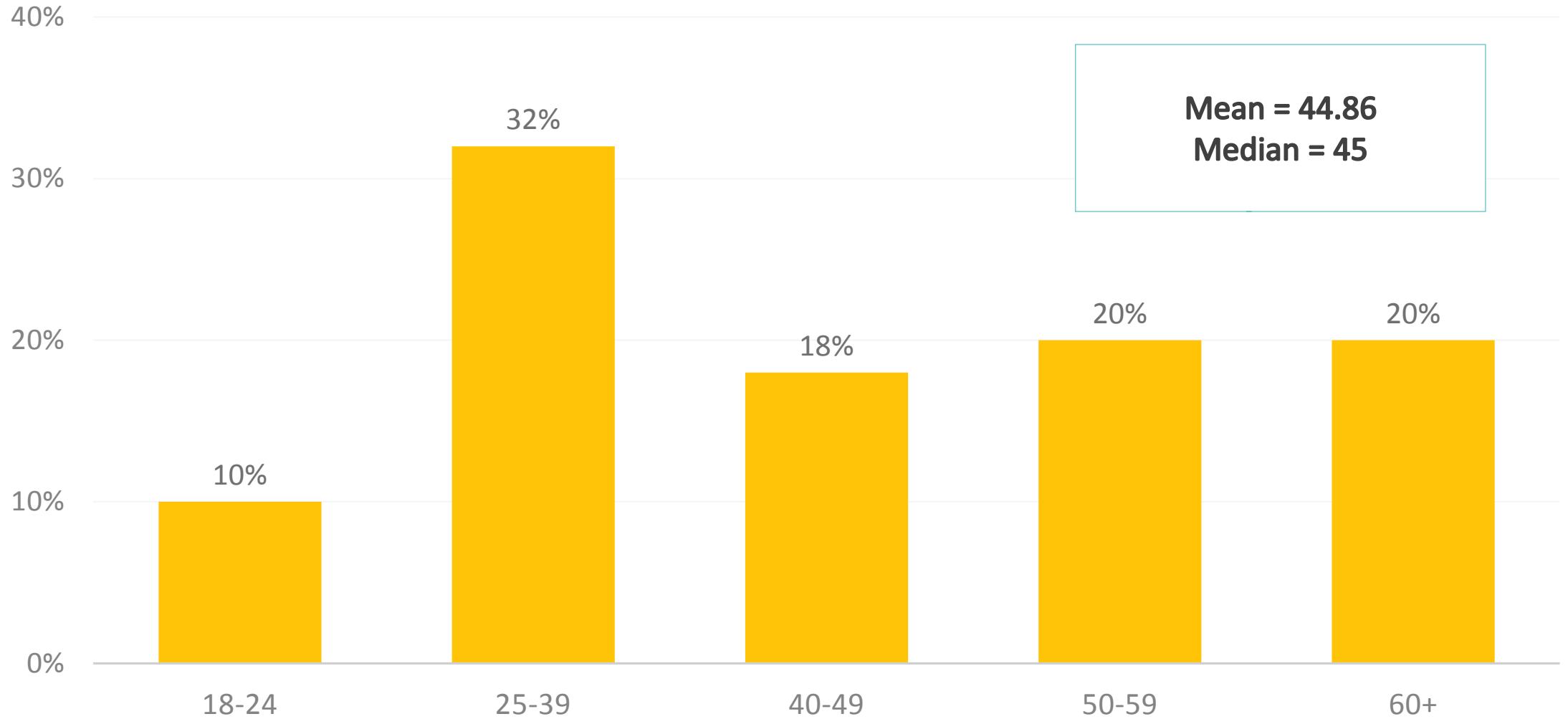
MARITAL STATUS



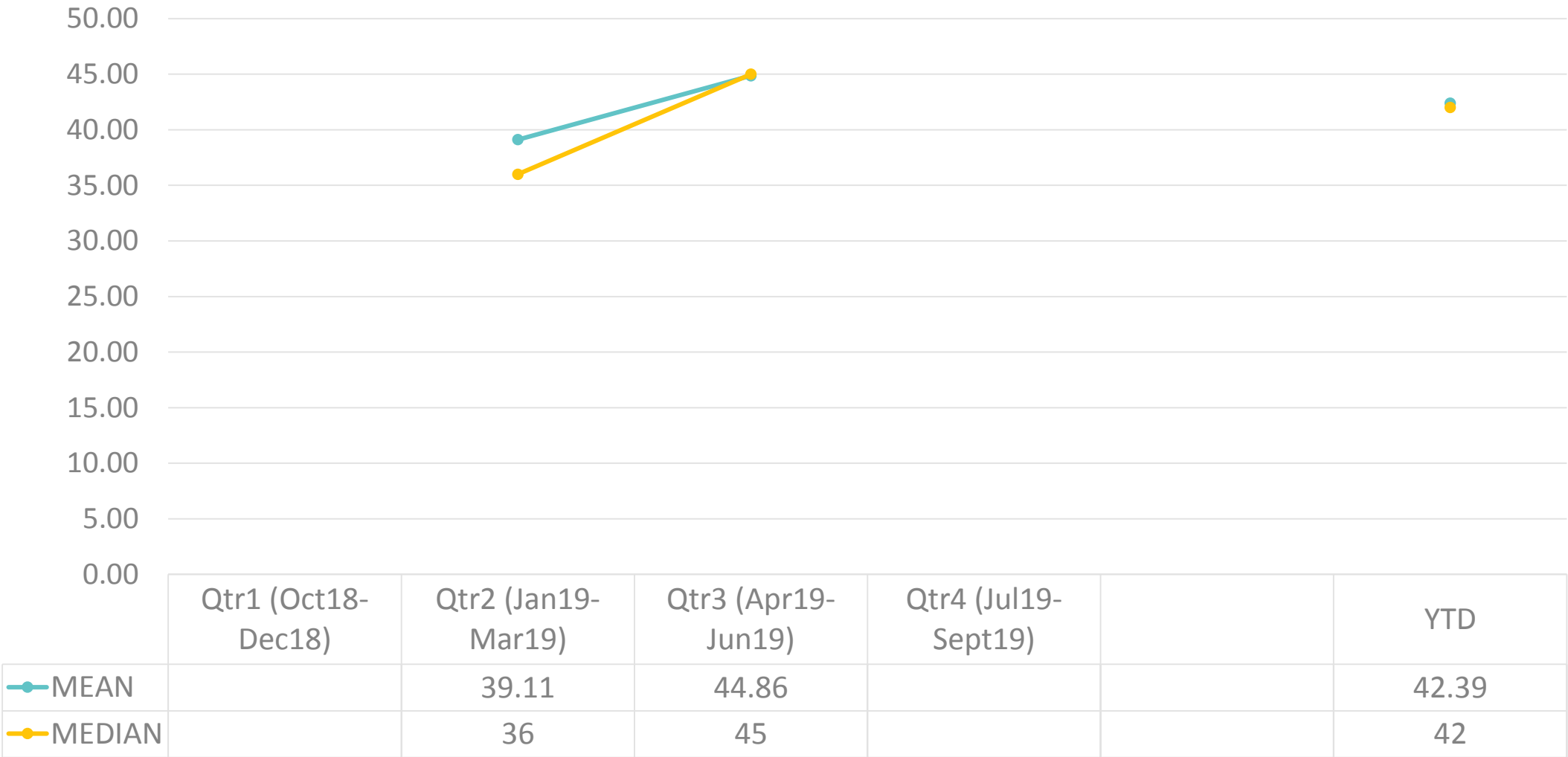
MARITAL STATUS – TRACKING



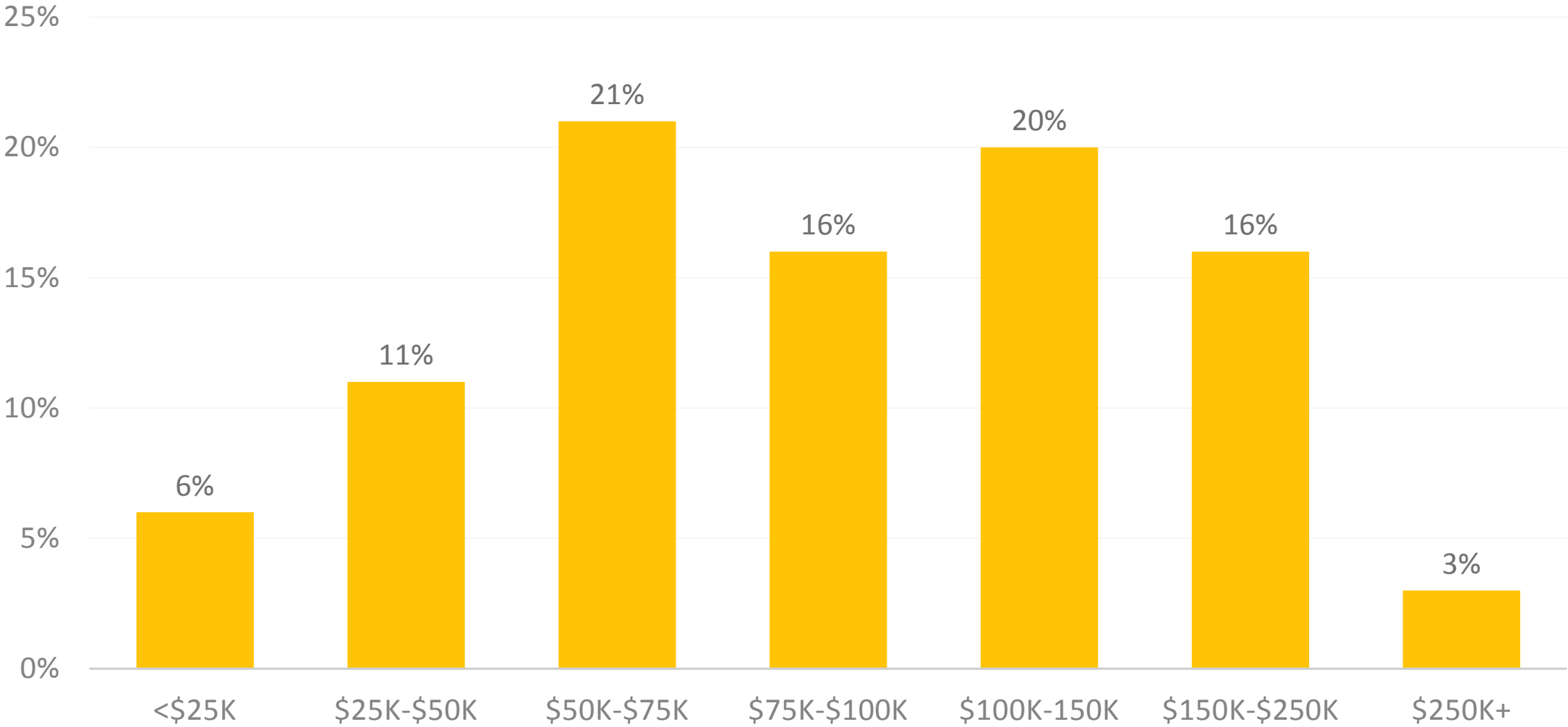
AGE



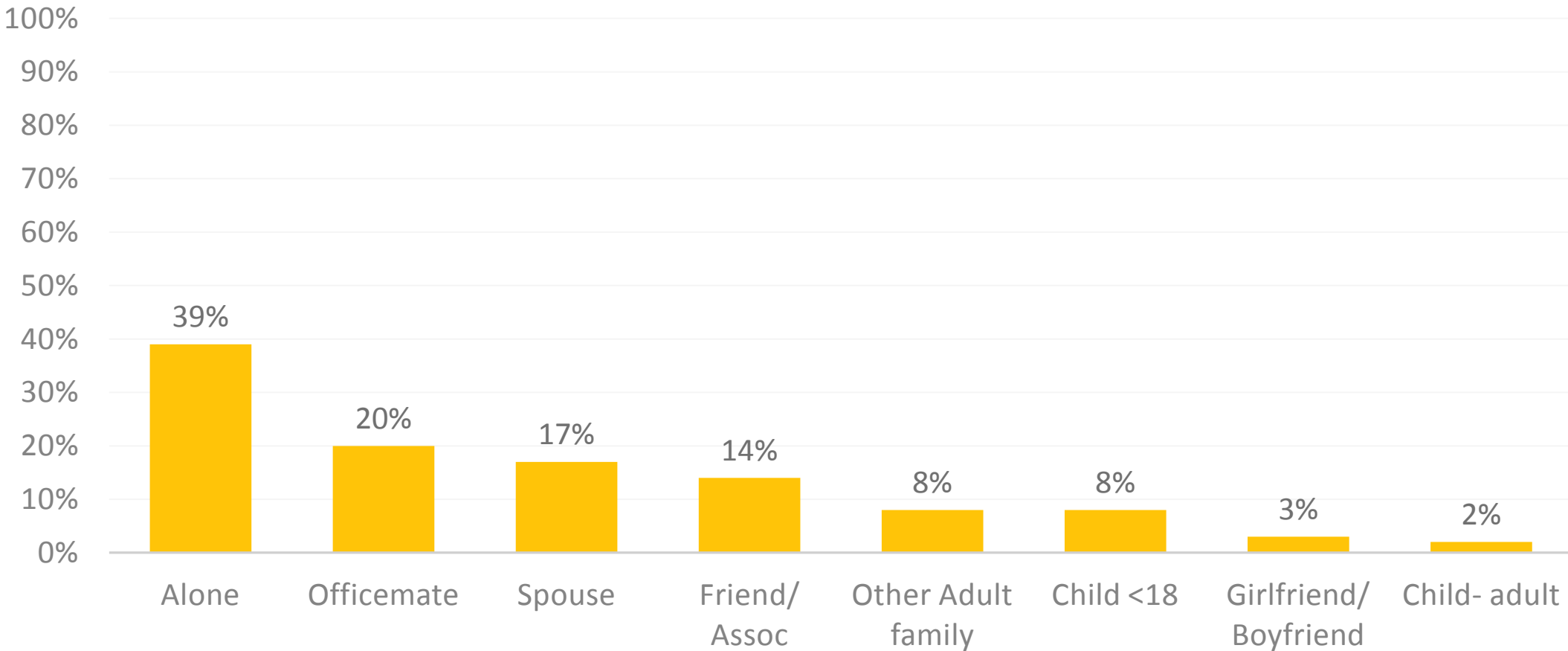
AGE – TRACKING



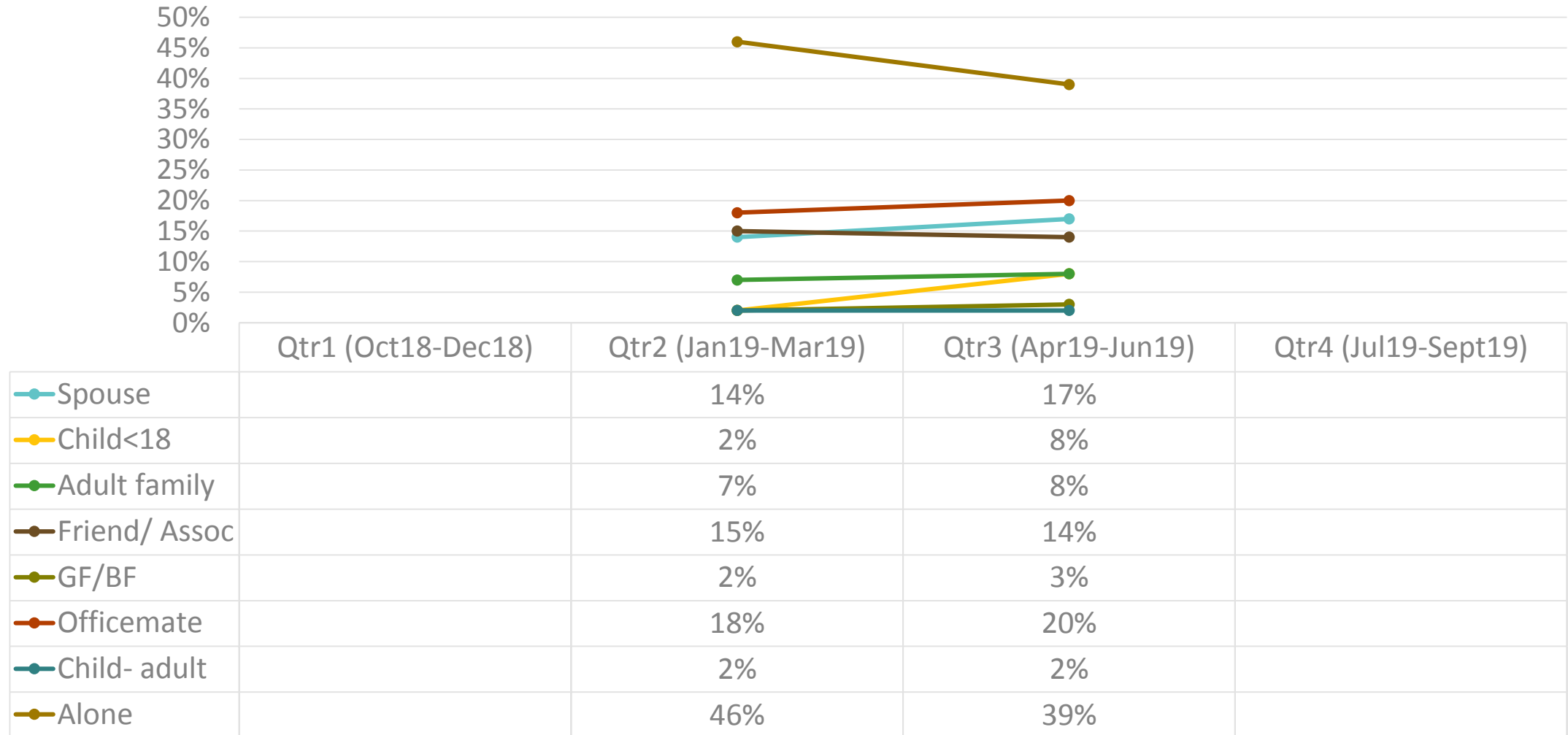
HOUSEHOLD INCOME



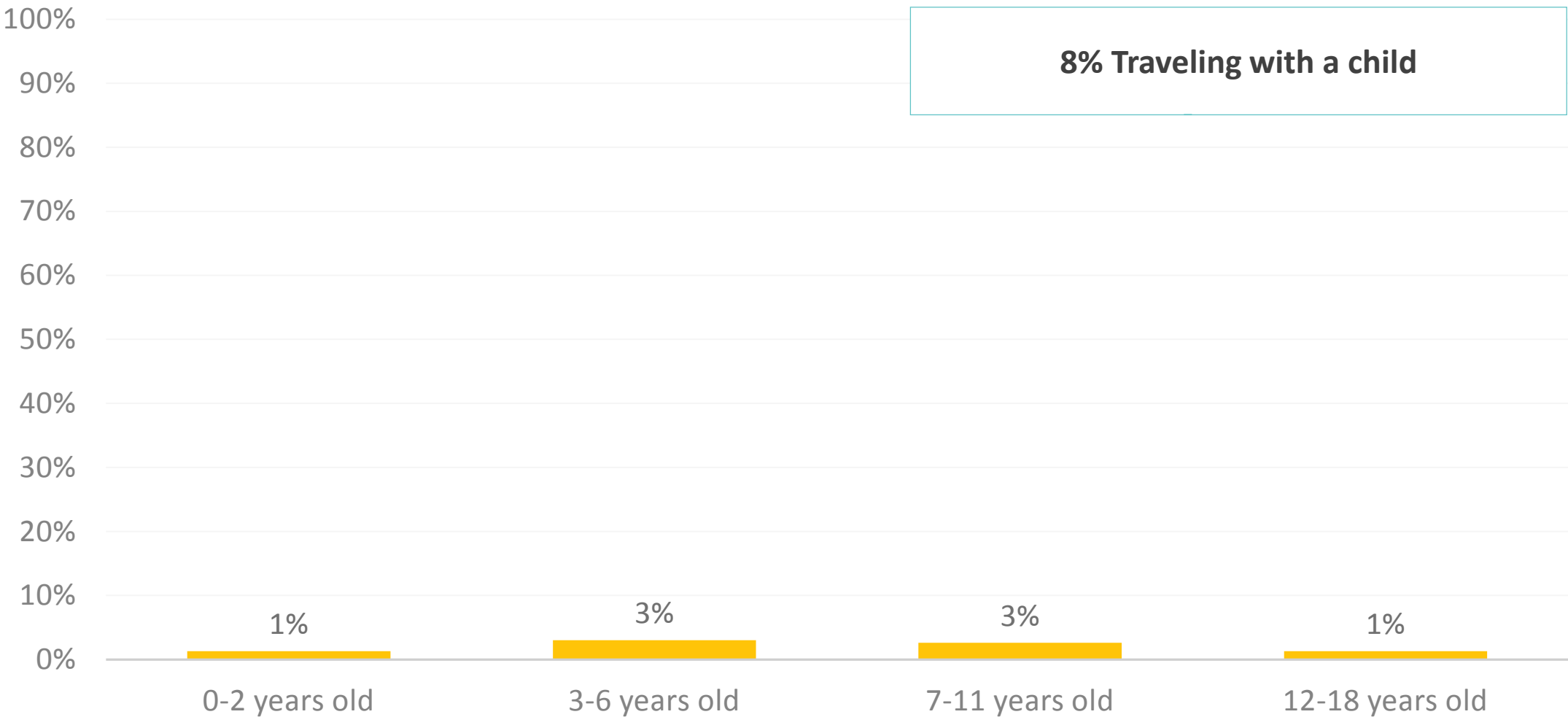
TRAVEL PARTY



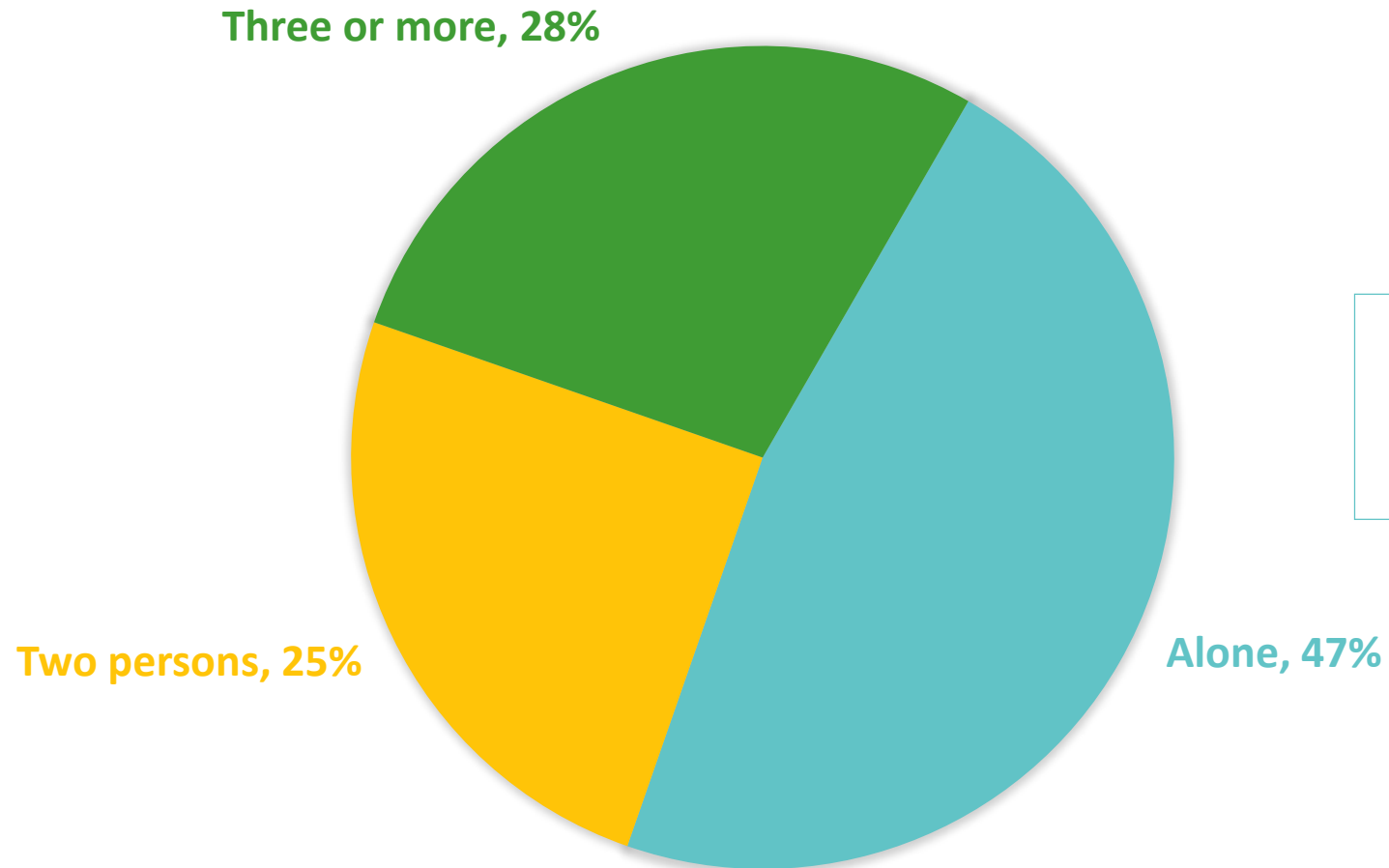
TRAVEL PARTY – TRACKING



TRAVEL PARTY – CHILD UNDER 18

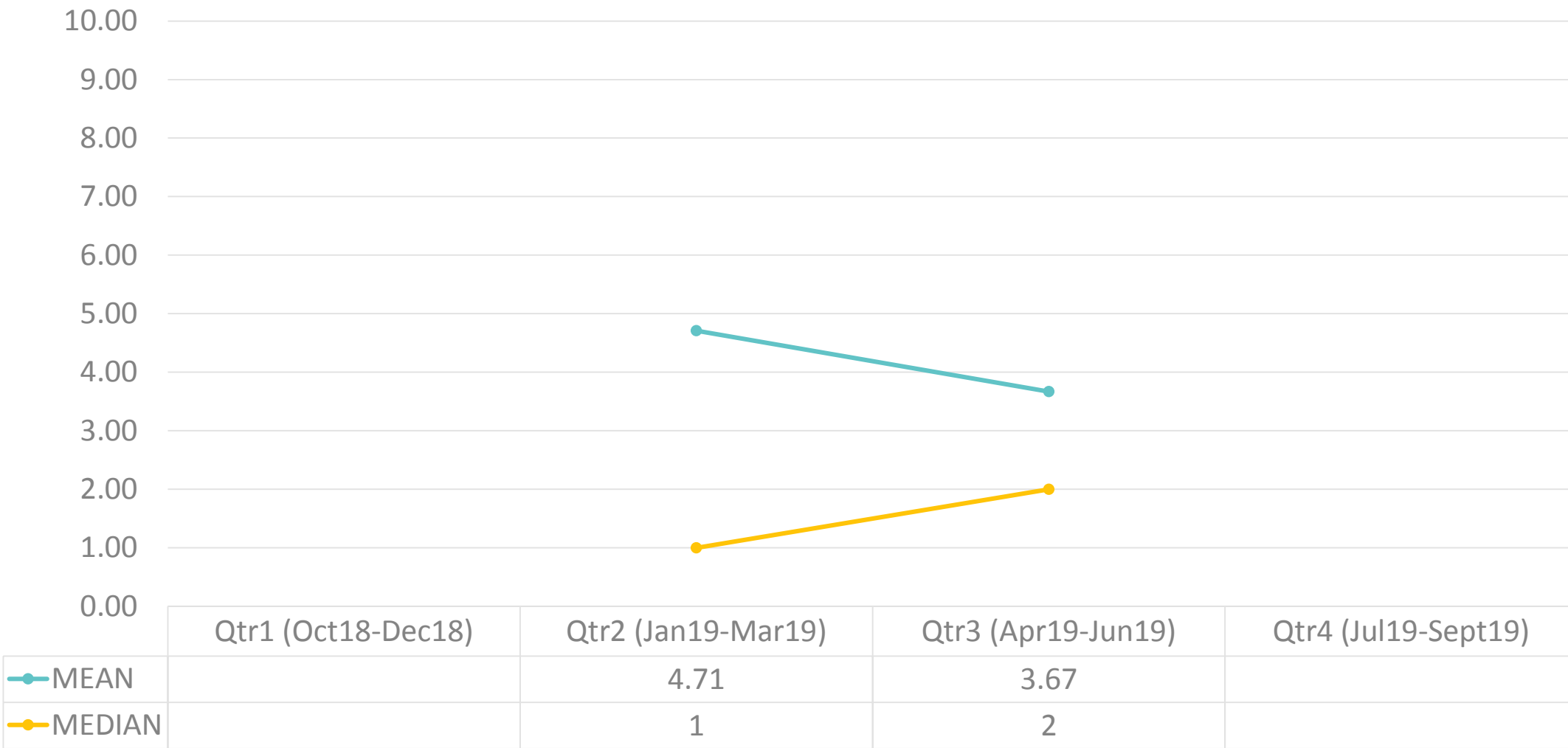


TRAVEL PARTY SIZE

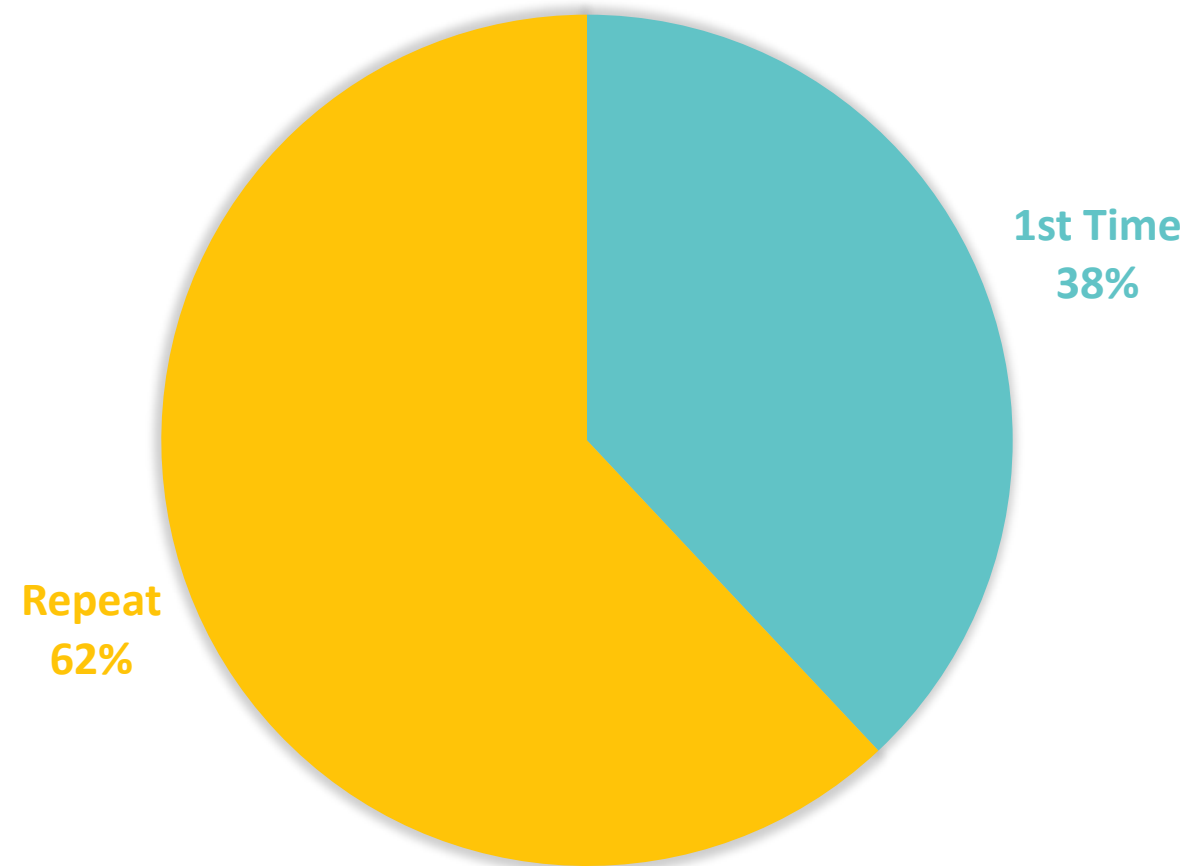


Mean = 3.67
Median = 2

TRAVEL PARTY SIZE – TRACKING

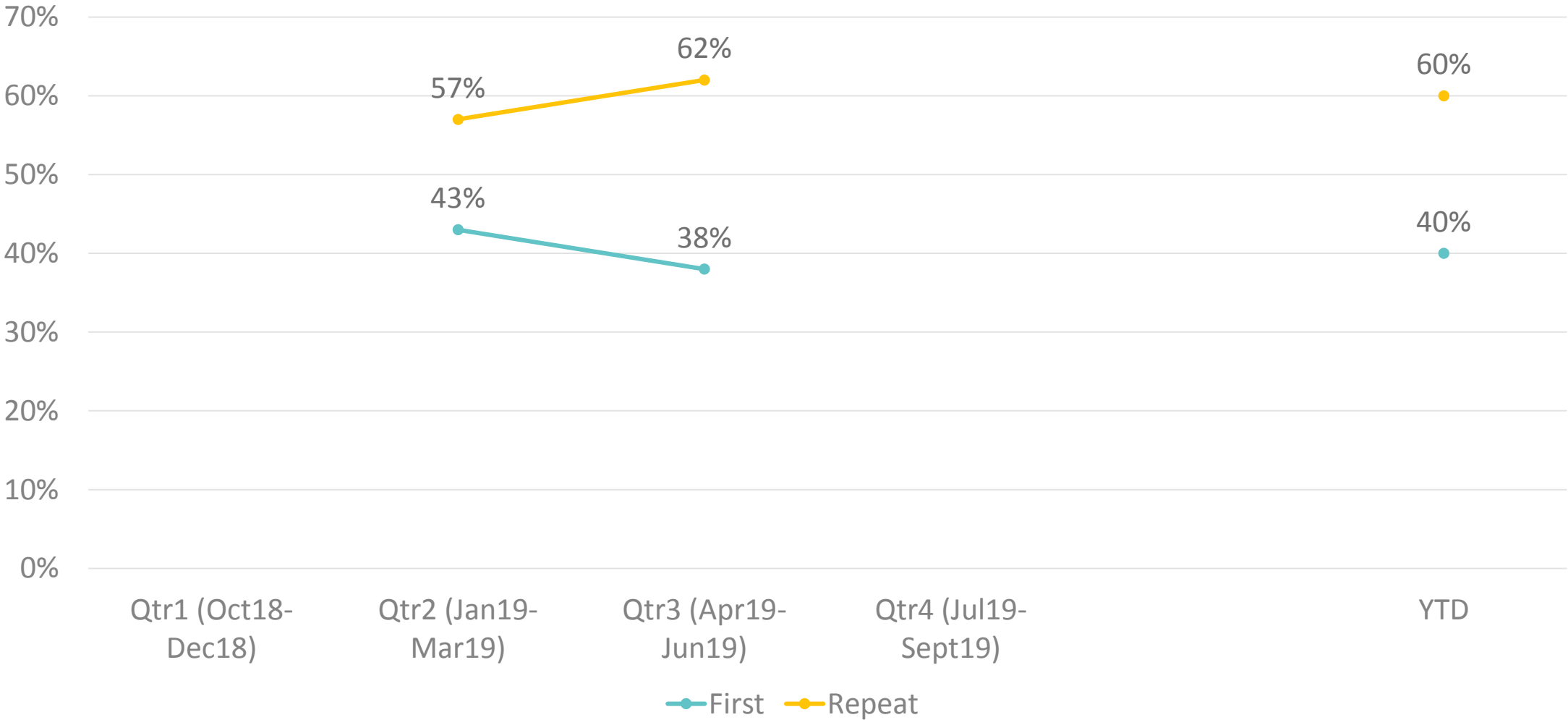


TRIPS TO GUAM

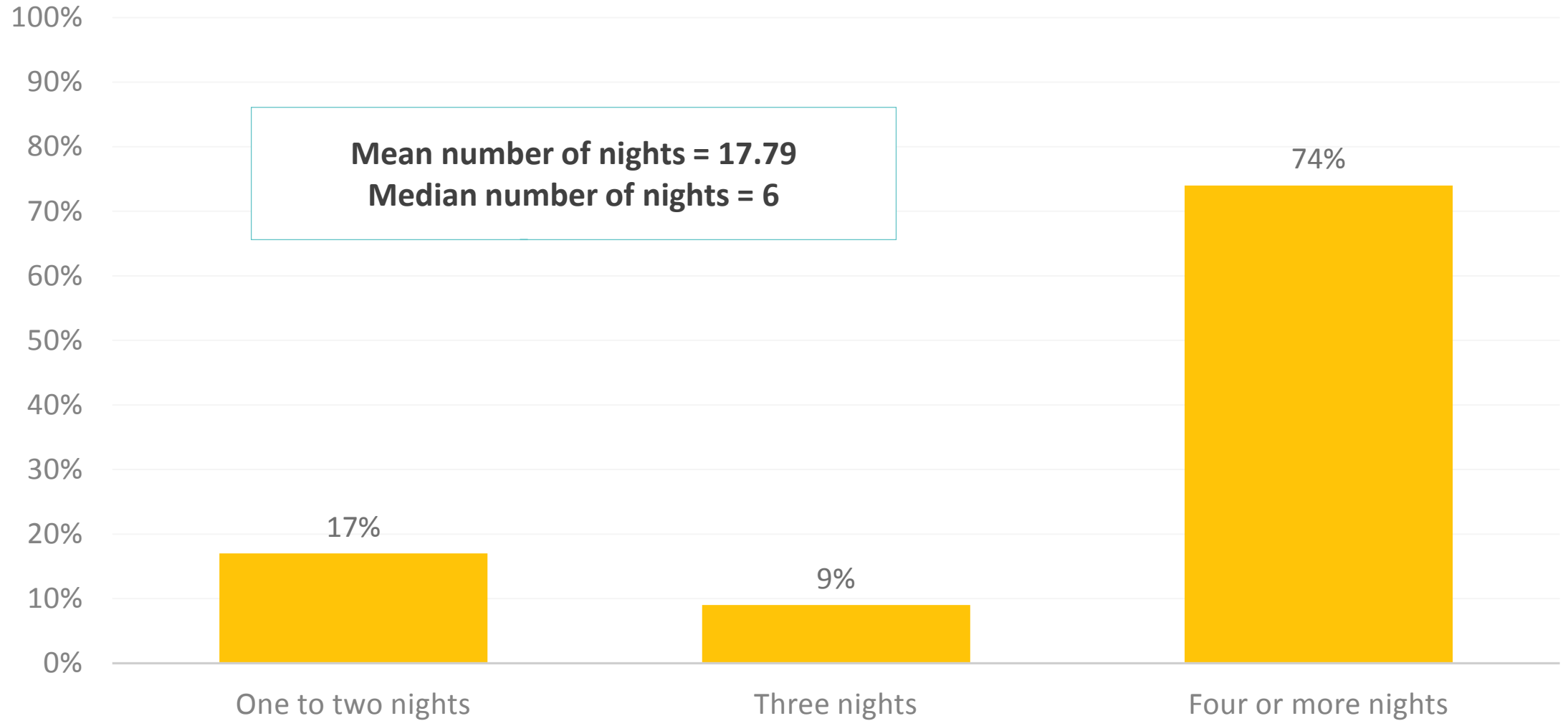


Mean = 5.44
Median = 2

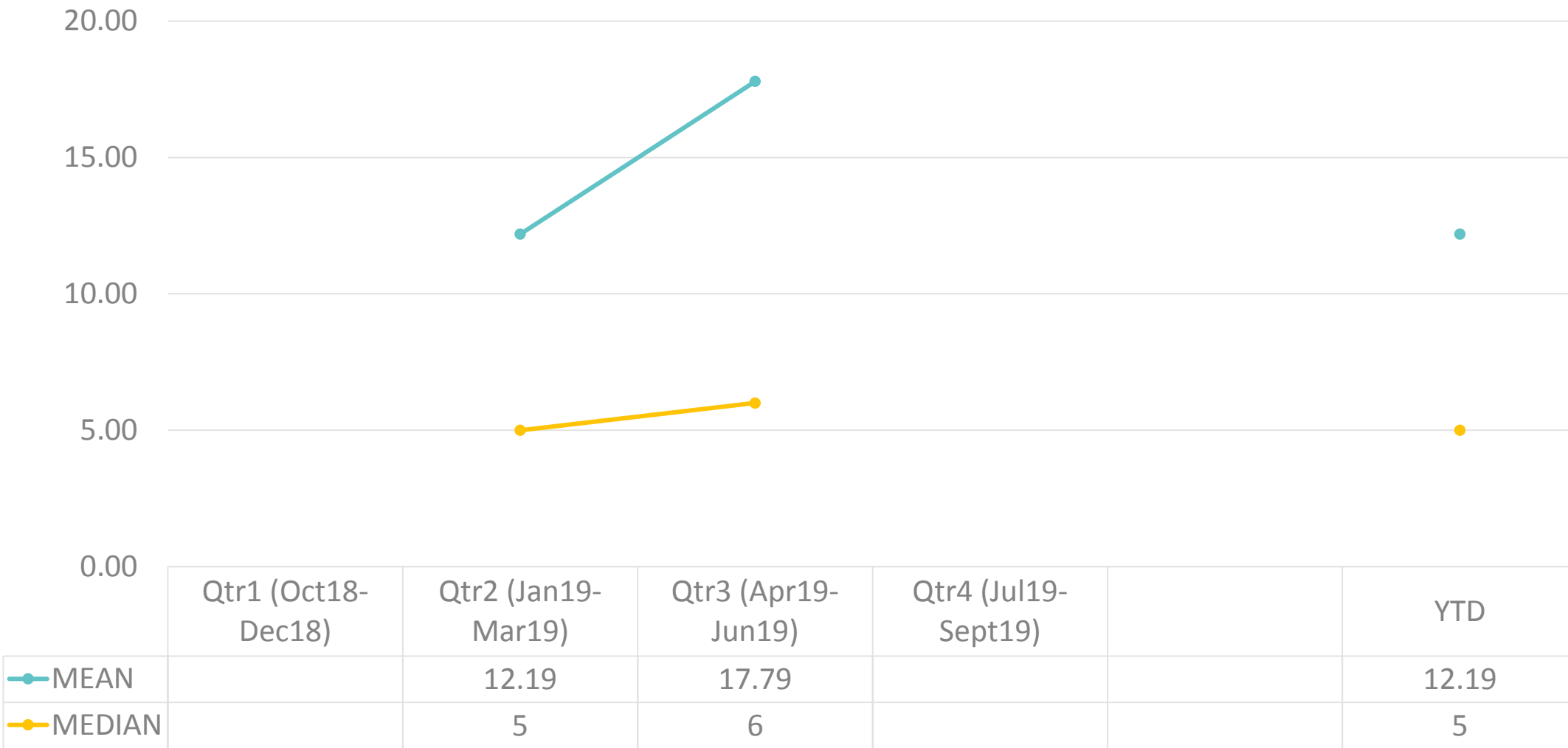
TRIPS TO GUAM – TRACKING



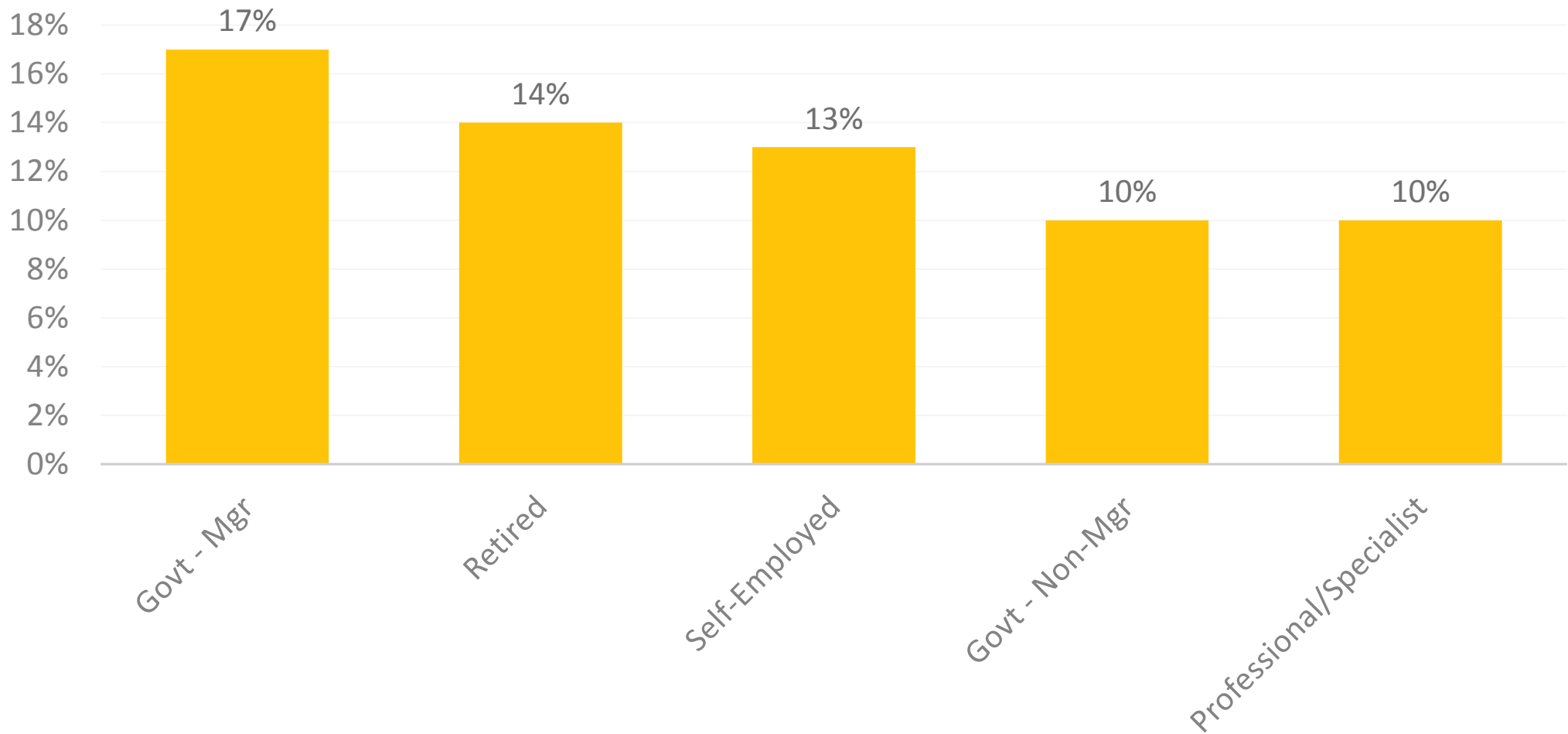
LENGTH OF STAY



LENGTH OF STAY – TRACKING



OCCUPATION – Top Responses (10%+)



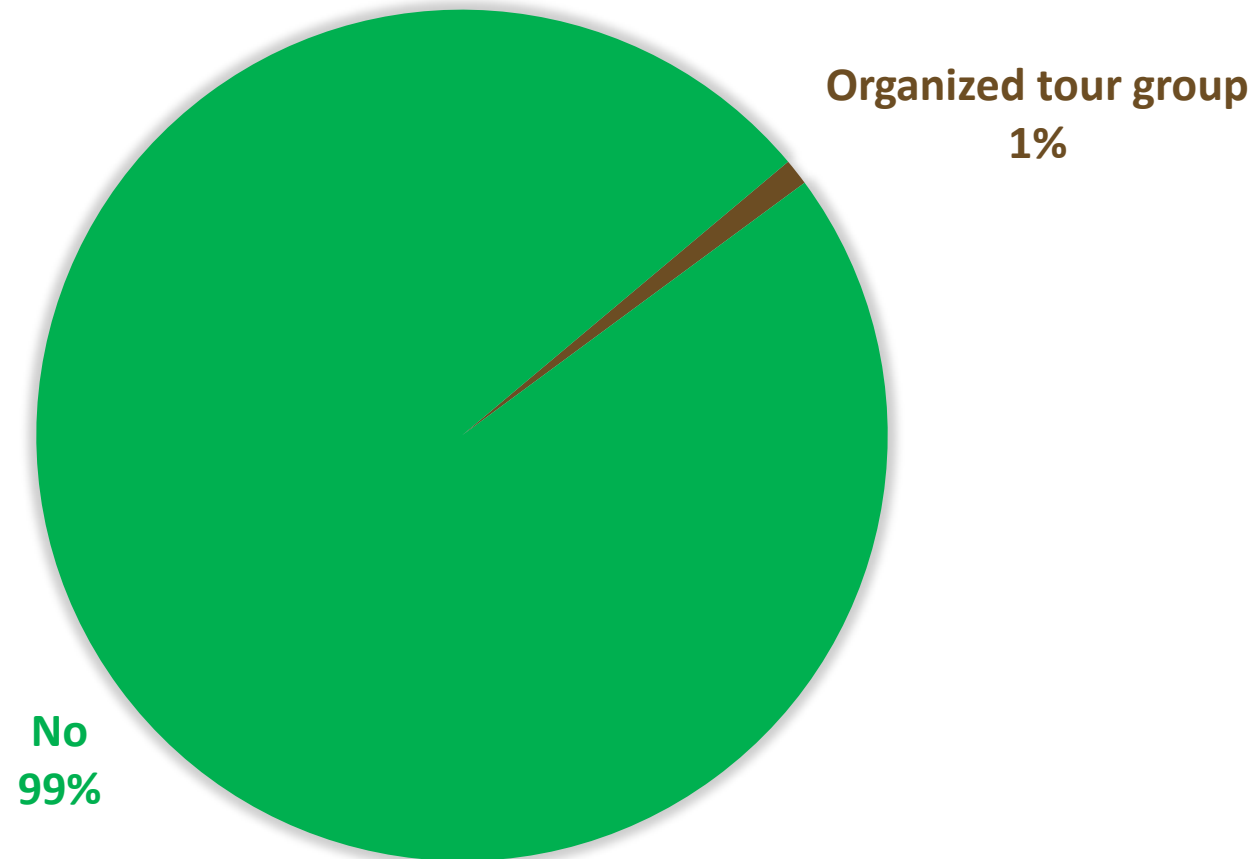


SECTION 2

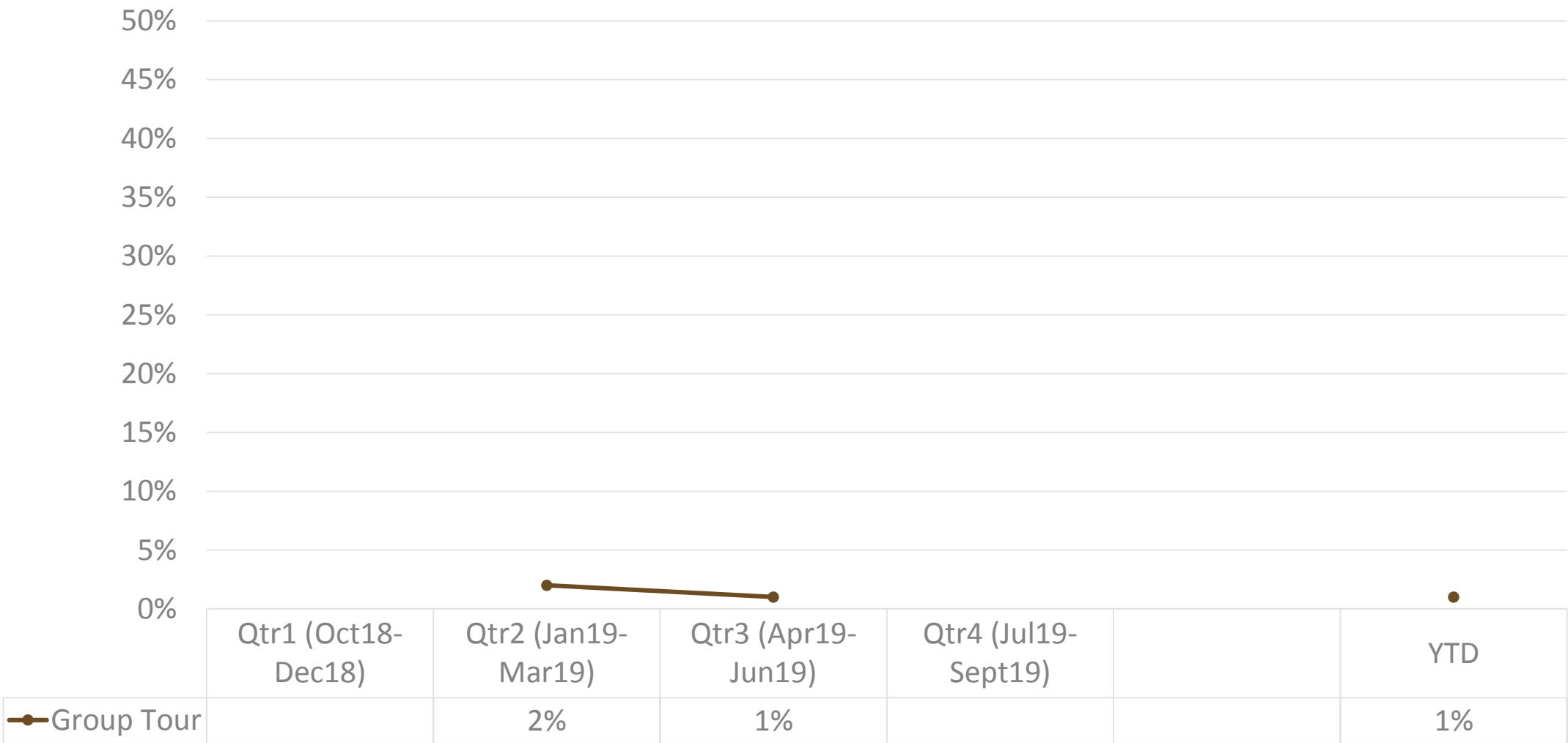
TRAVEL PLANNING



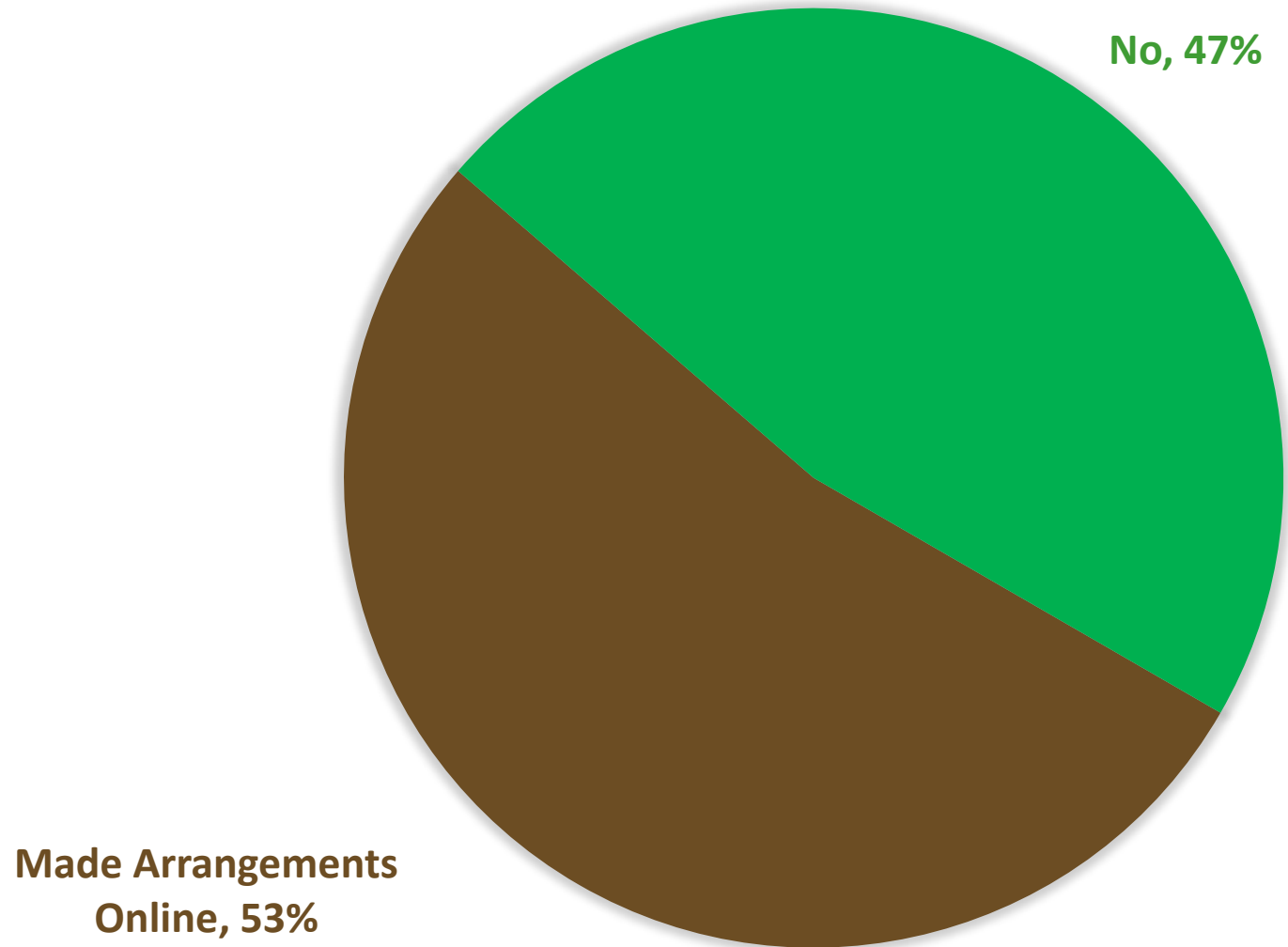
ORGANIZED TOUR GROUP



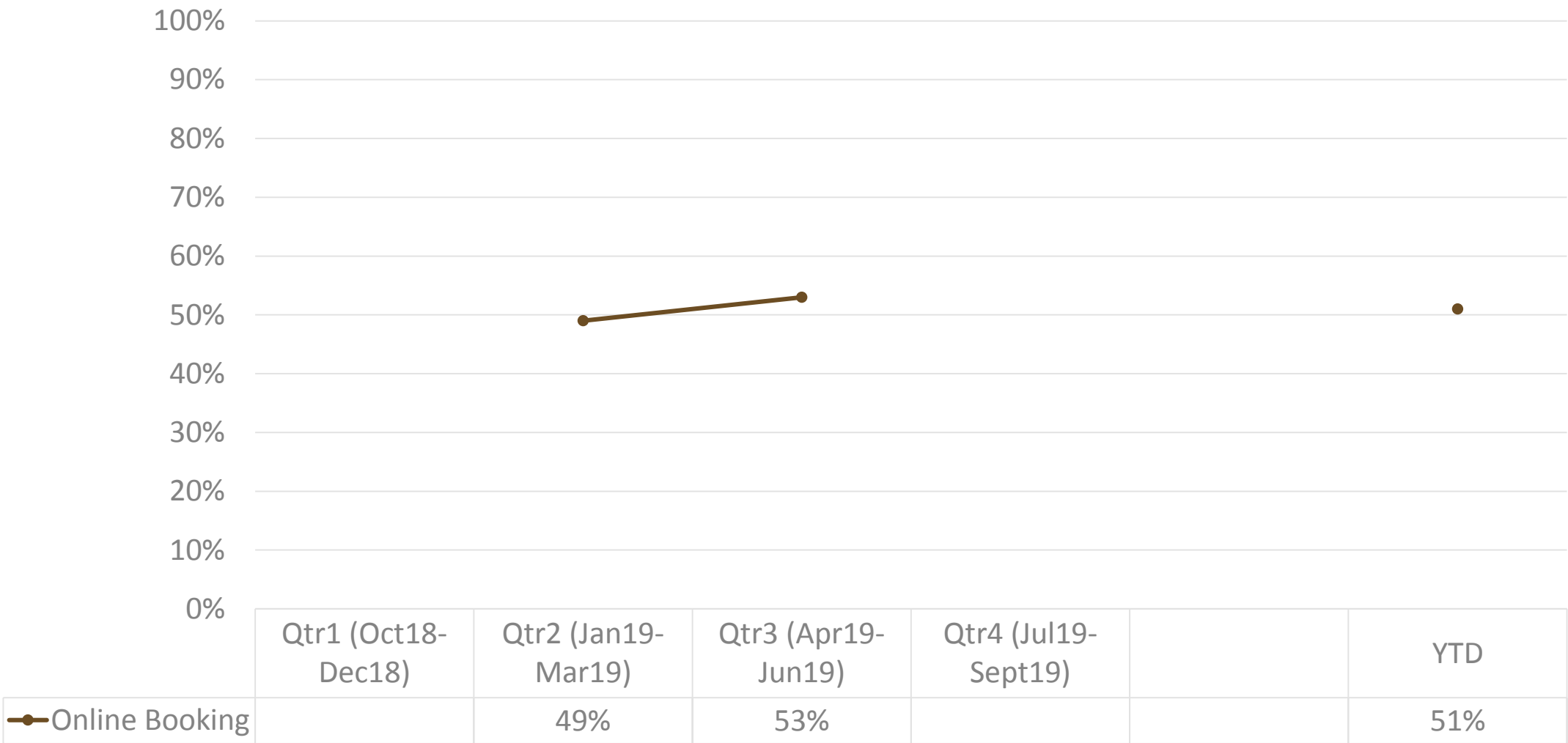
ORGANIZED TOUR GROUP – TRACKING



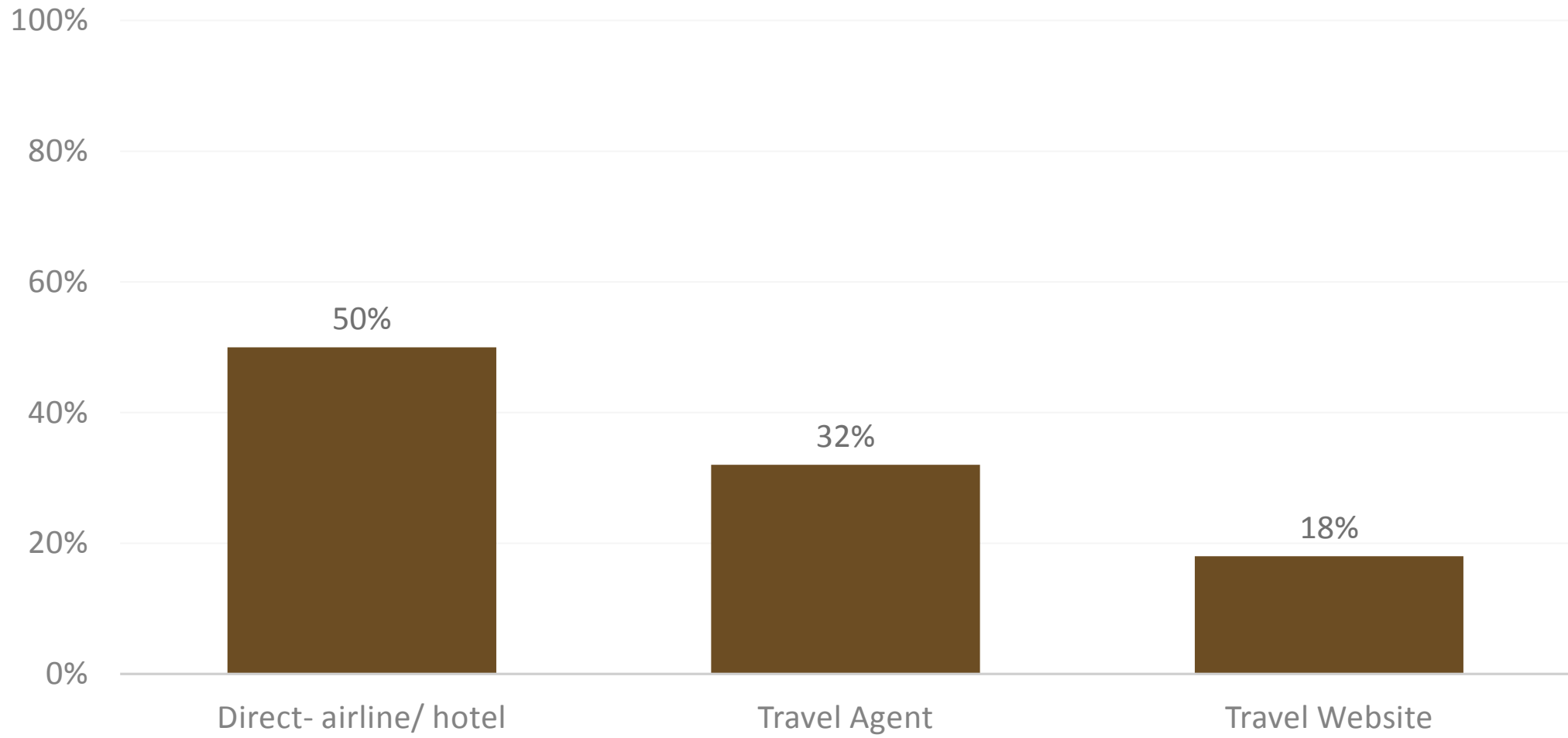
ONLINE BOOKING



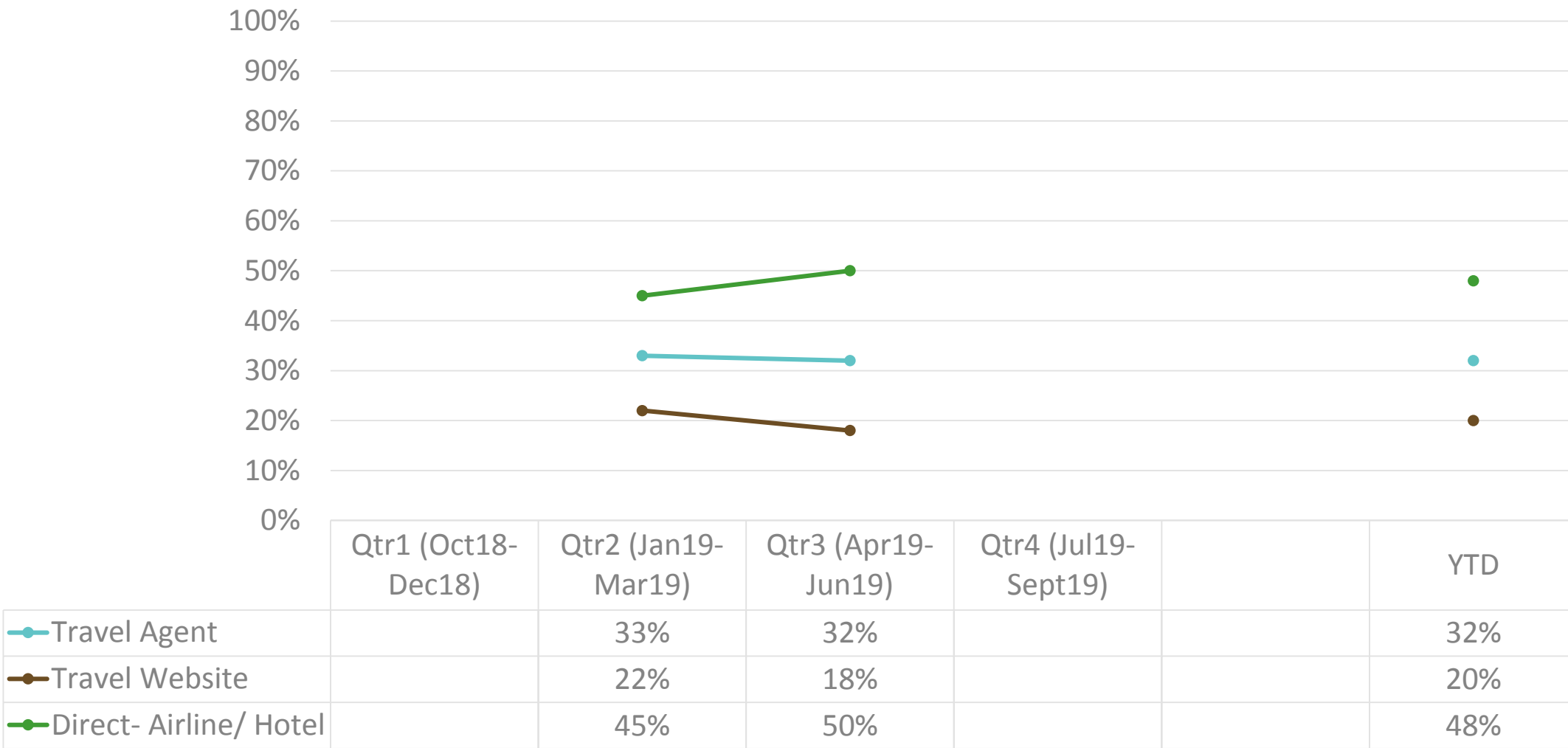
ONLINE BOOKING – TRACKING



TRAVEL ARRANGEMENTS



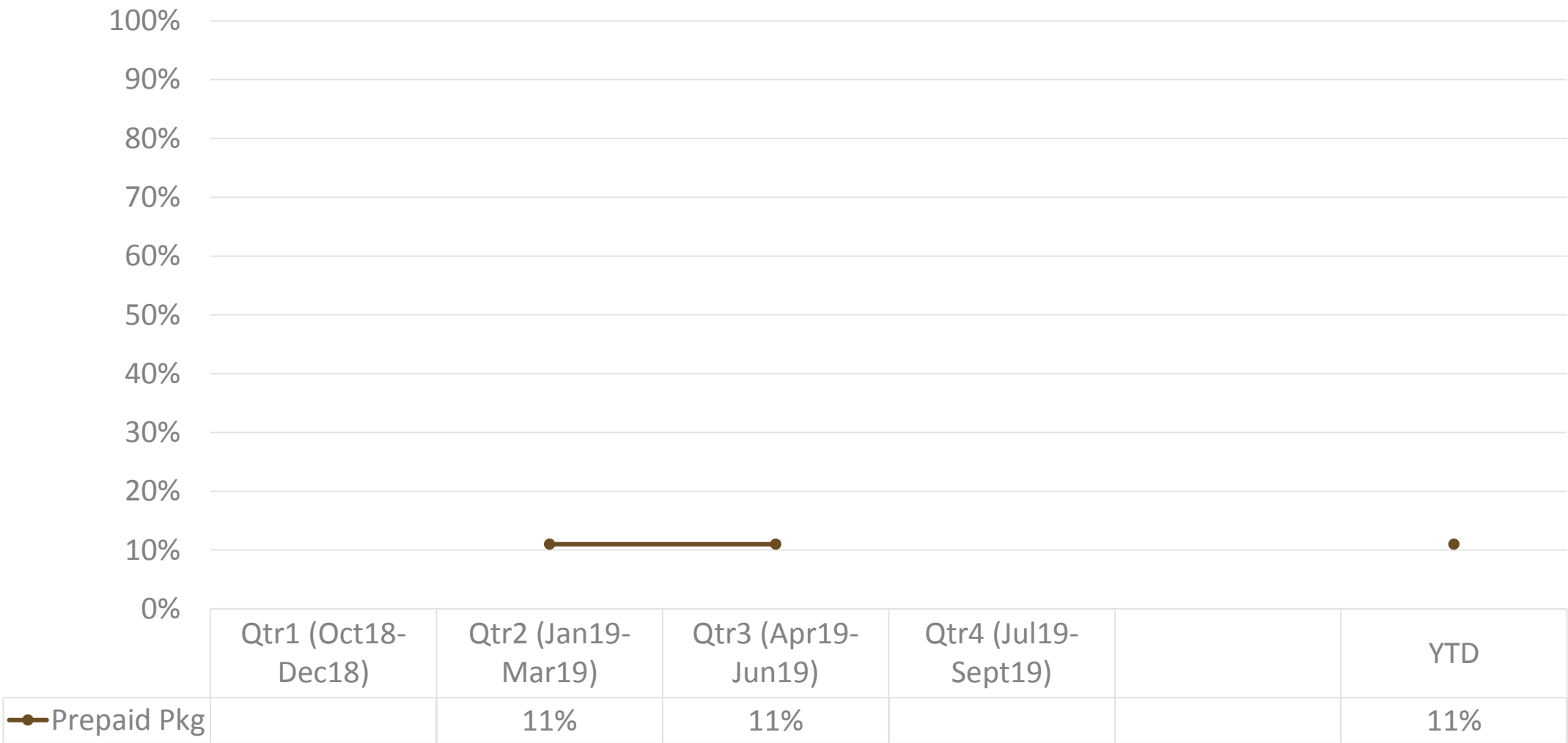
TRAVEL ARRANGEMENTS – TRACKING



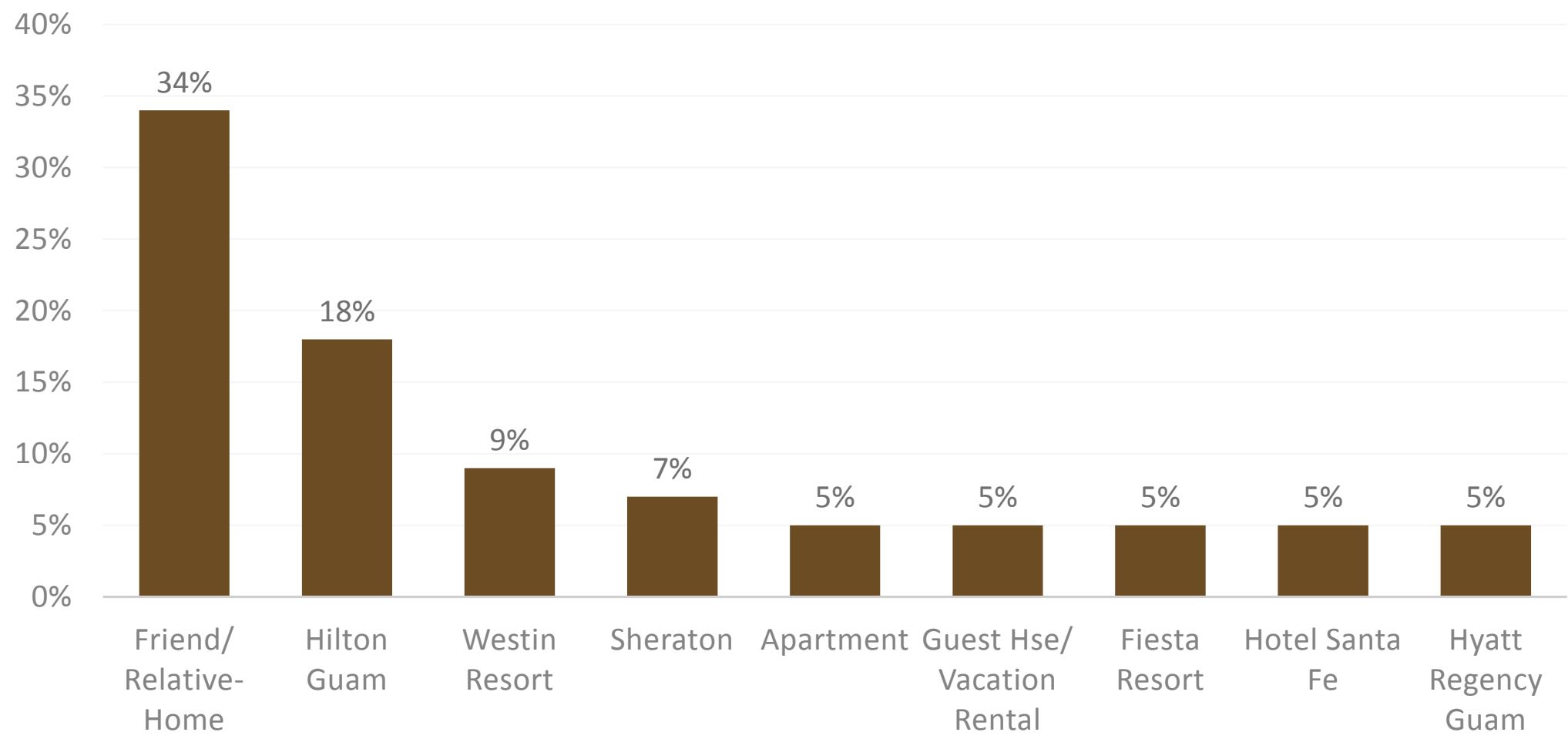
PREPAID PACKAGE TRIP



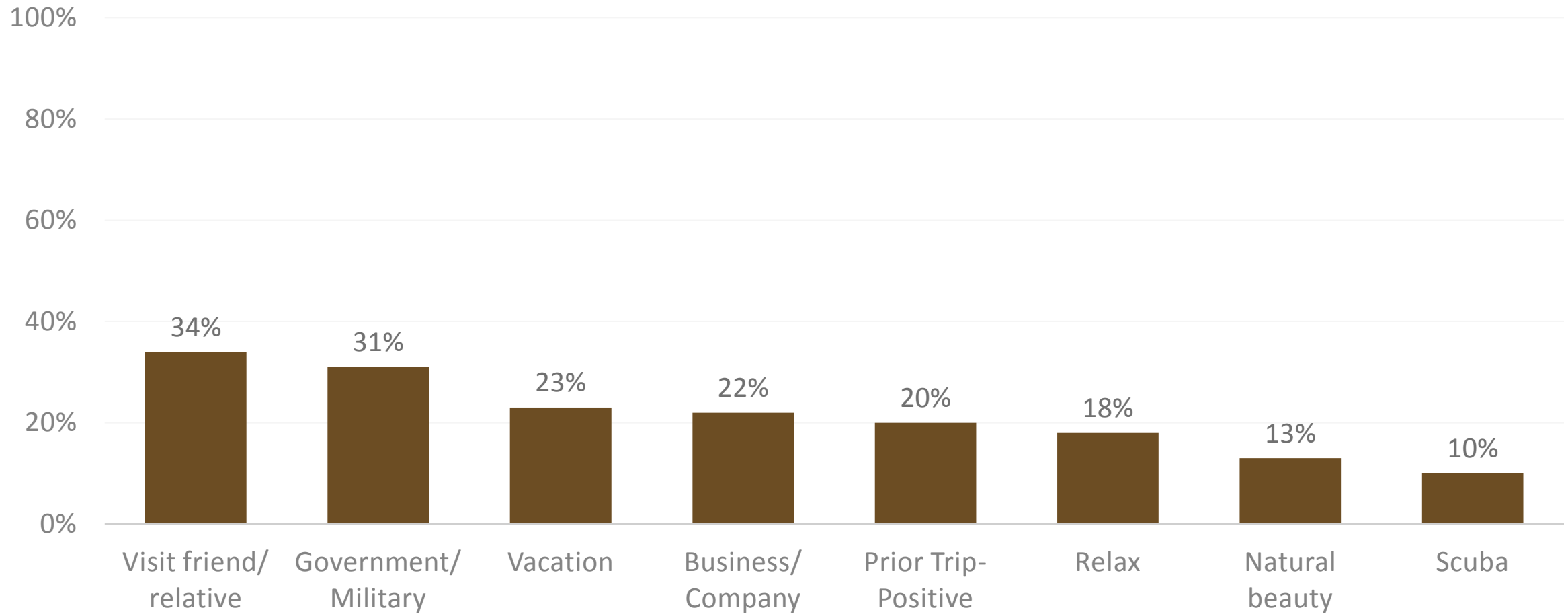
PREPAID PACKAGE TRIP



ACCOMMODATIONS (5%+)



TRAVEL MOTIVATIONS (10%+)





SECTION 3

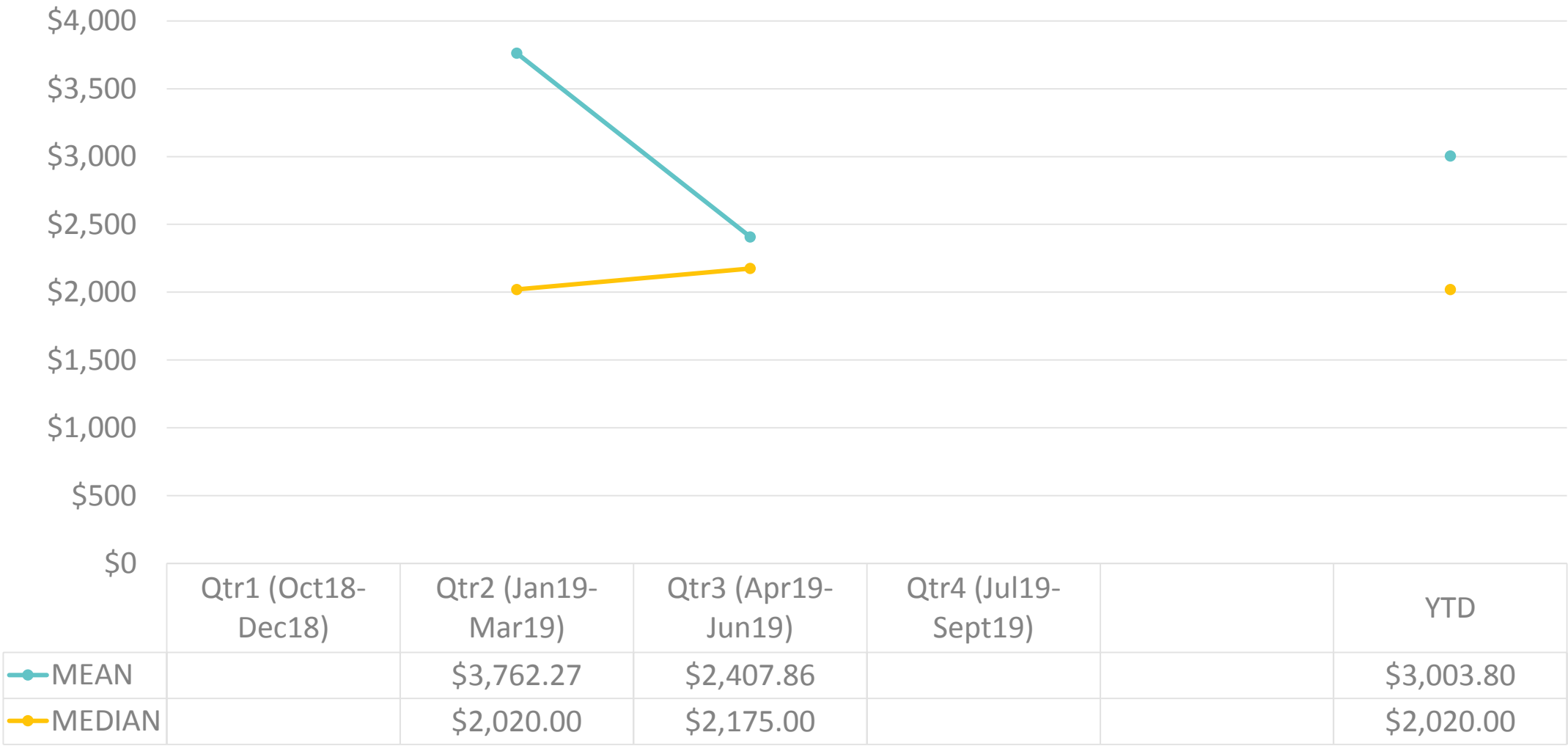
EXPENDITURES



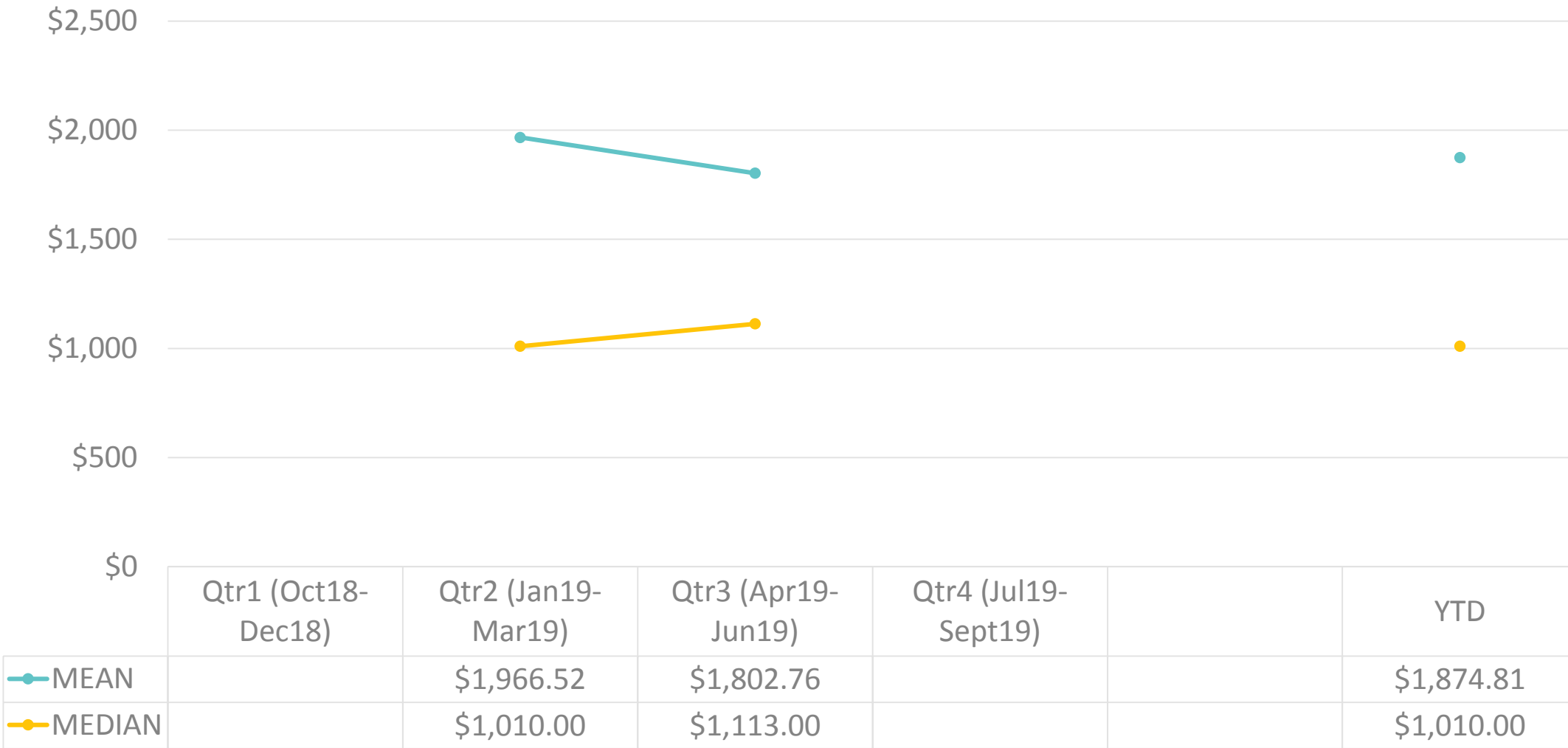
PREPAID PACKAGE EXPENDITURES

- \$2,407.86 = overall mean average prepaid package expense (for entire travel party) by respondent
- \$1,802.76 = overall mean average **per person** prepaid package expenditures

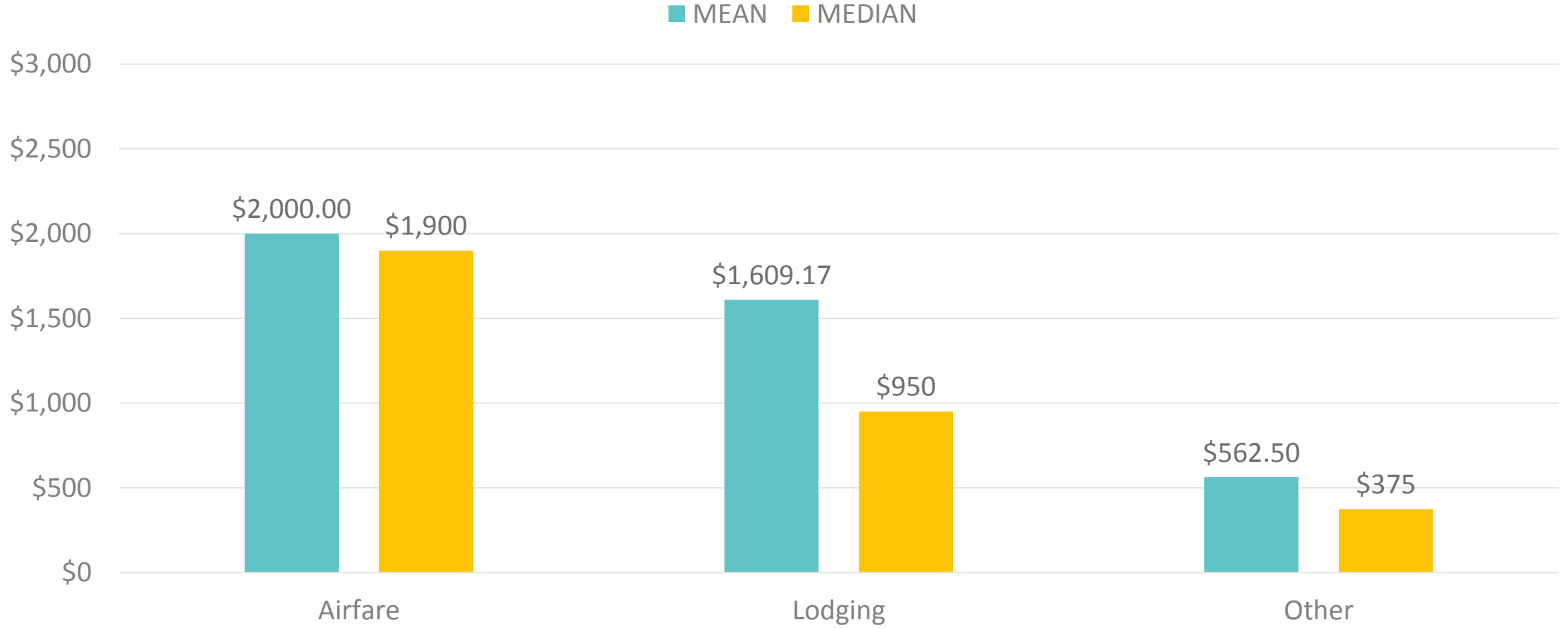
PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING



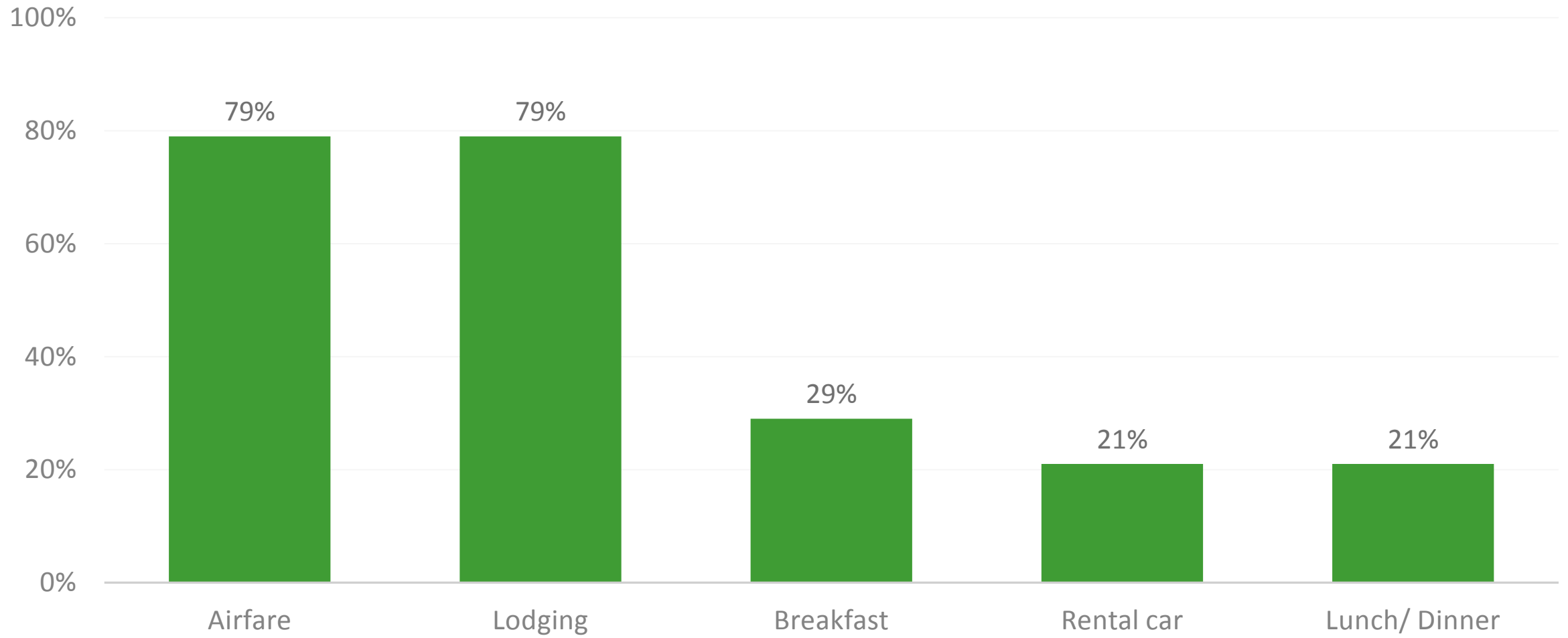
PREPAID PACKAGE – PER PERSON EXPENSE TRACKING



PREPAID PACKAGE – BREAKDOWN



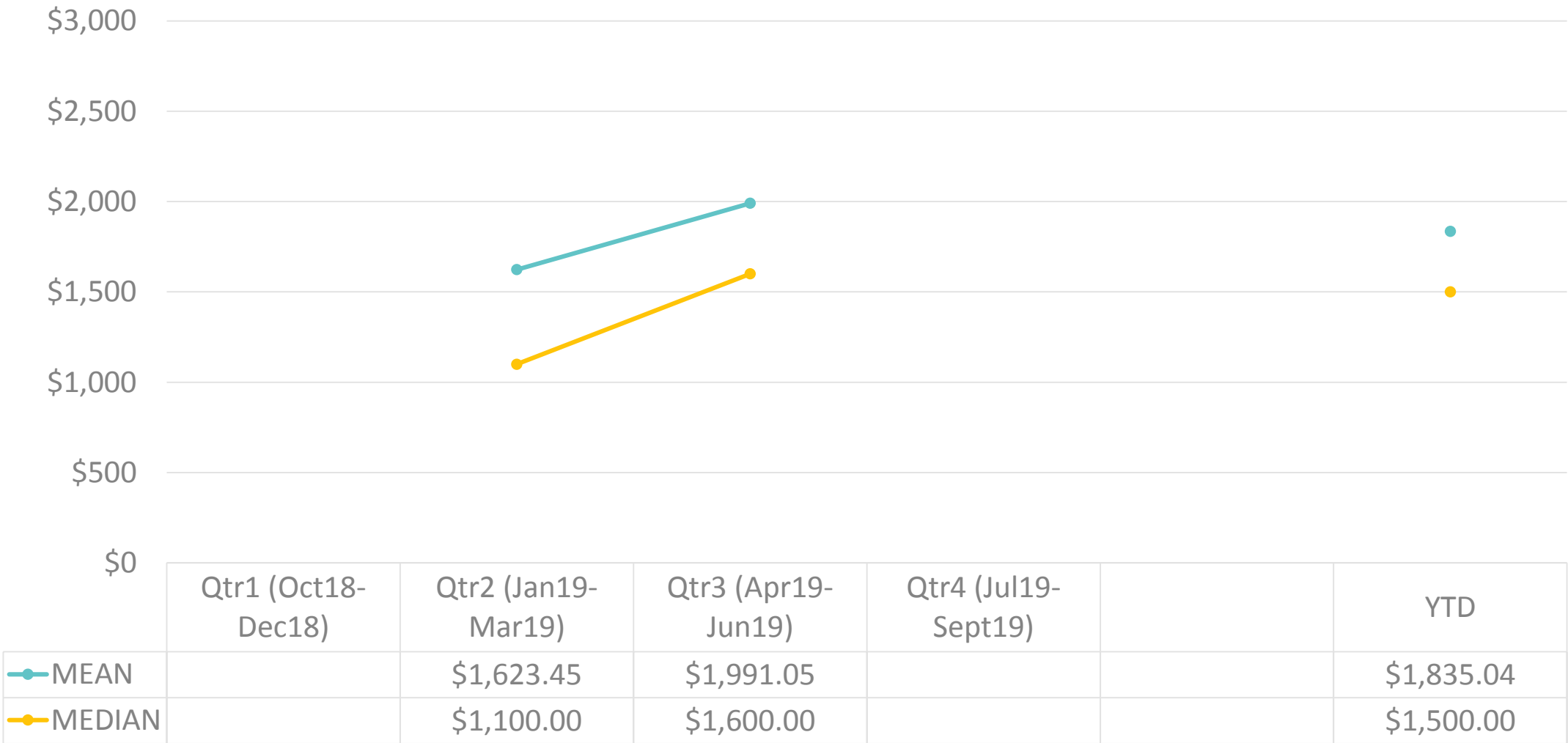
PREPAID PACKAGE – BREAKDOWN



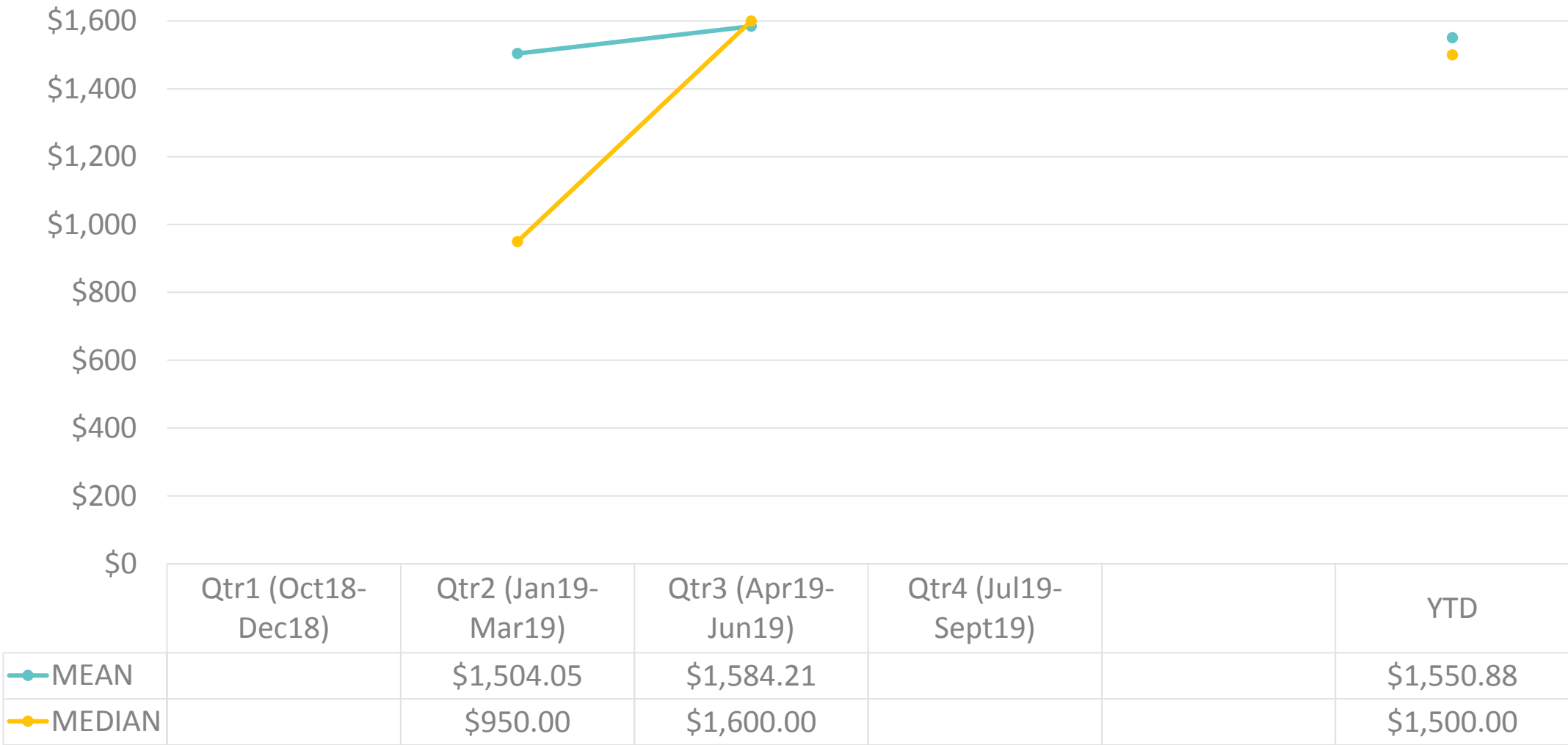
AIRFARE – FIT TRAVELER

- \$1,991.05 = overall mean average airfare expense (for entire travel party) by respondent
- \$1,835.04 = overall mean average **per person** airfare expenditures

AIRFARE – FIT TRAVELER (GROUP) TRACKING



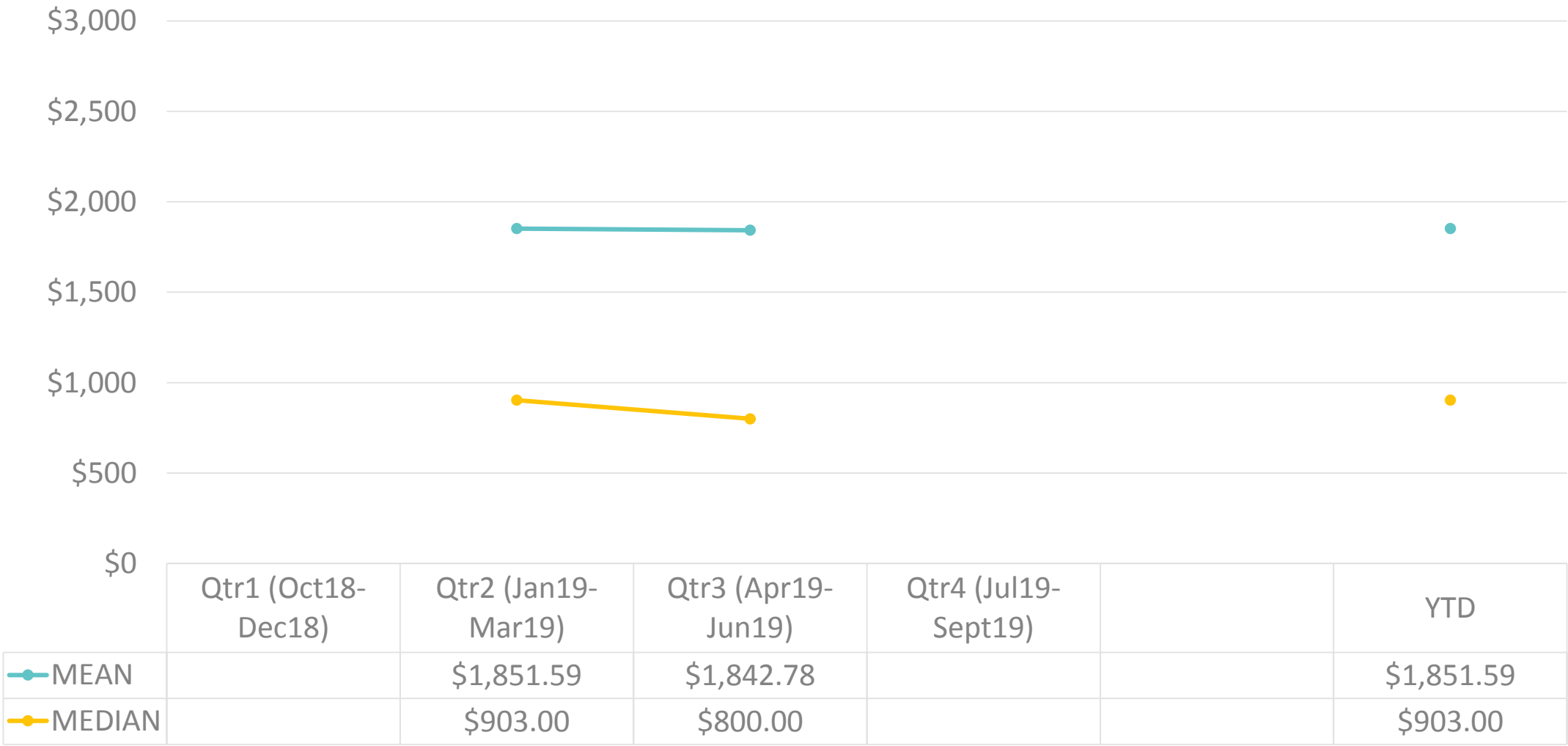
AIRFARE – FIT TRAVELER (Per Person) TRACKING



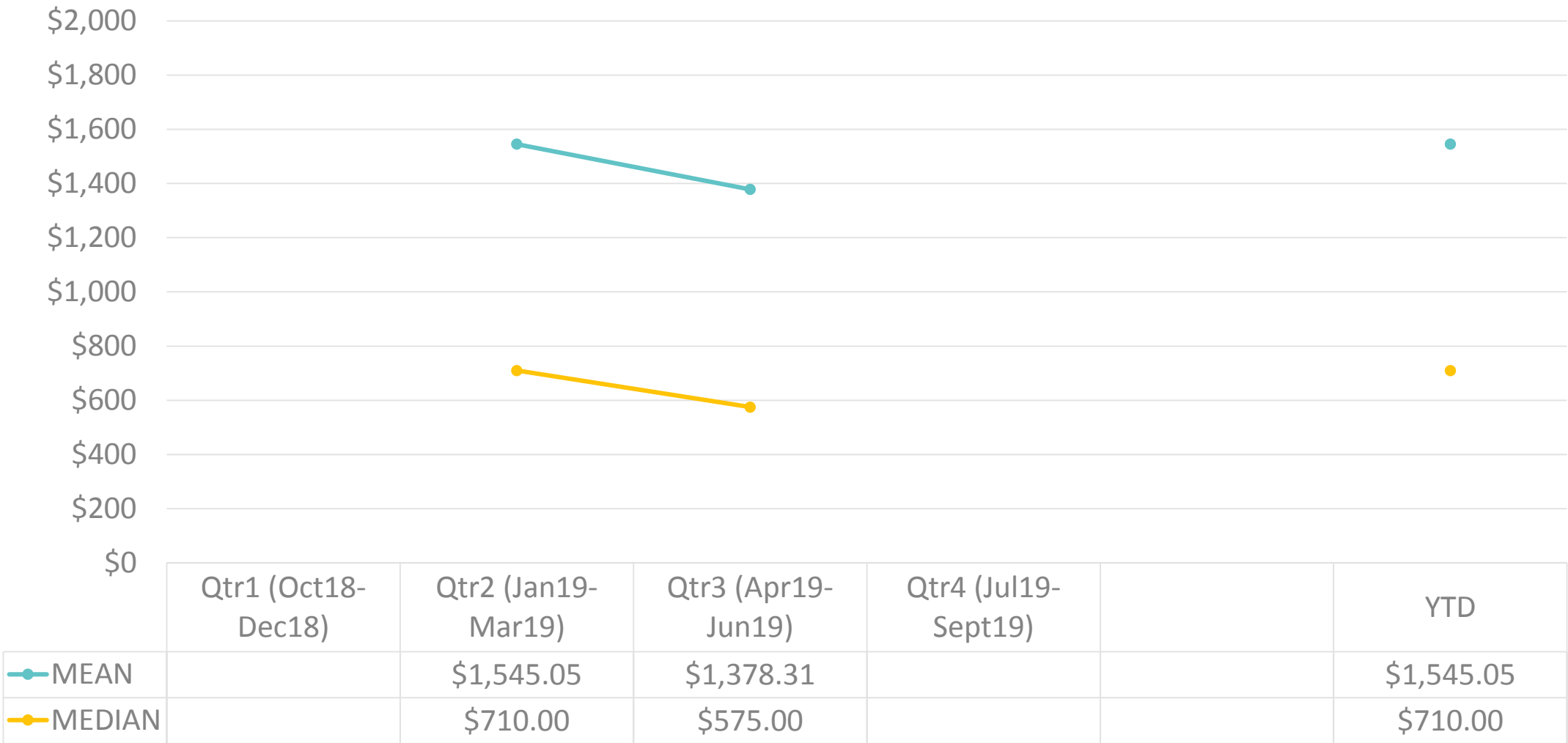
ONISLE EXPENDITURES

- \$1,842.78 = overall mean average expense (for entire travel party) by respondent
- \$1,378.31 = overall mean average **per person** expenditures

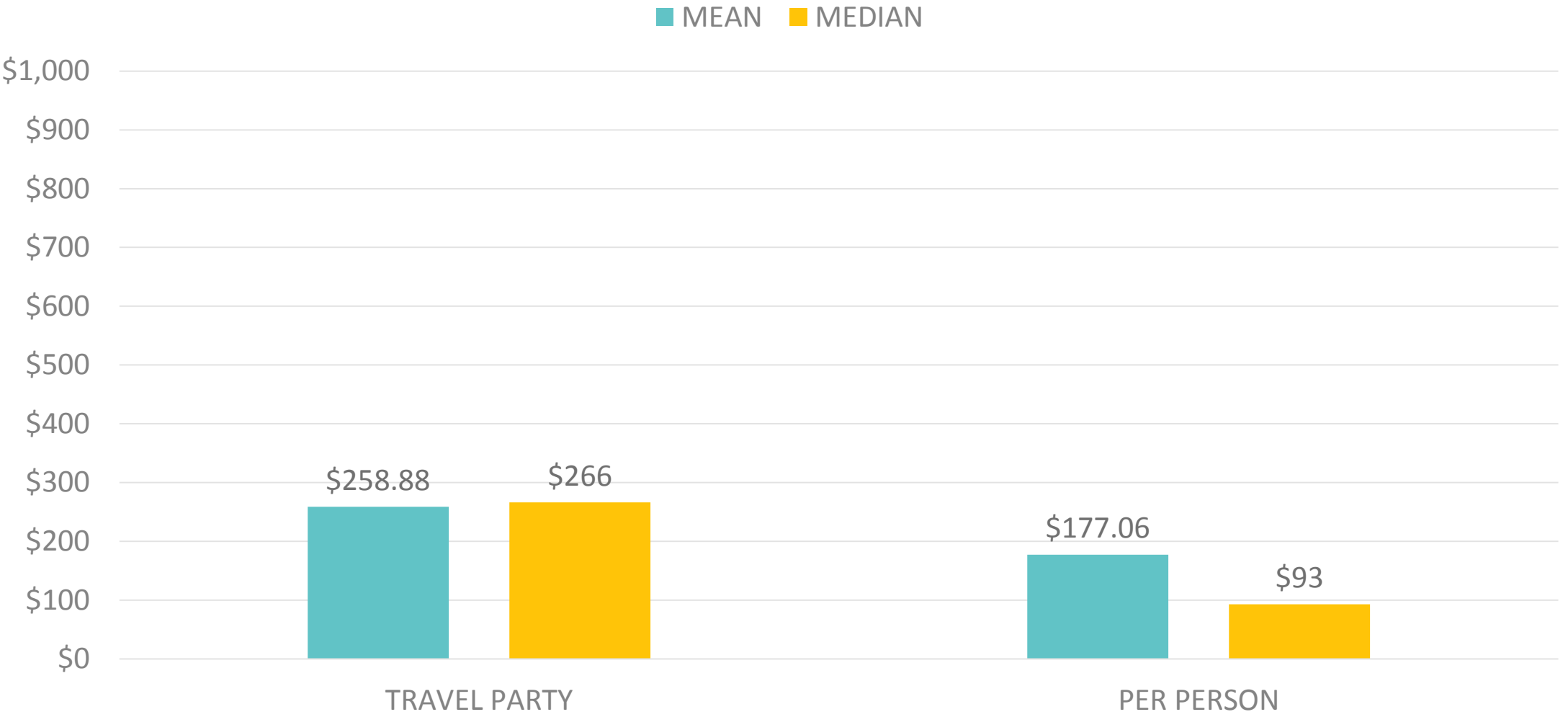
ONISLE – TRAVEL PARTY TRACKING



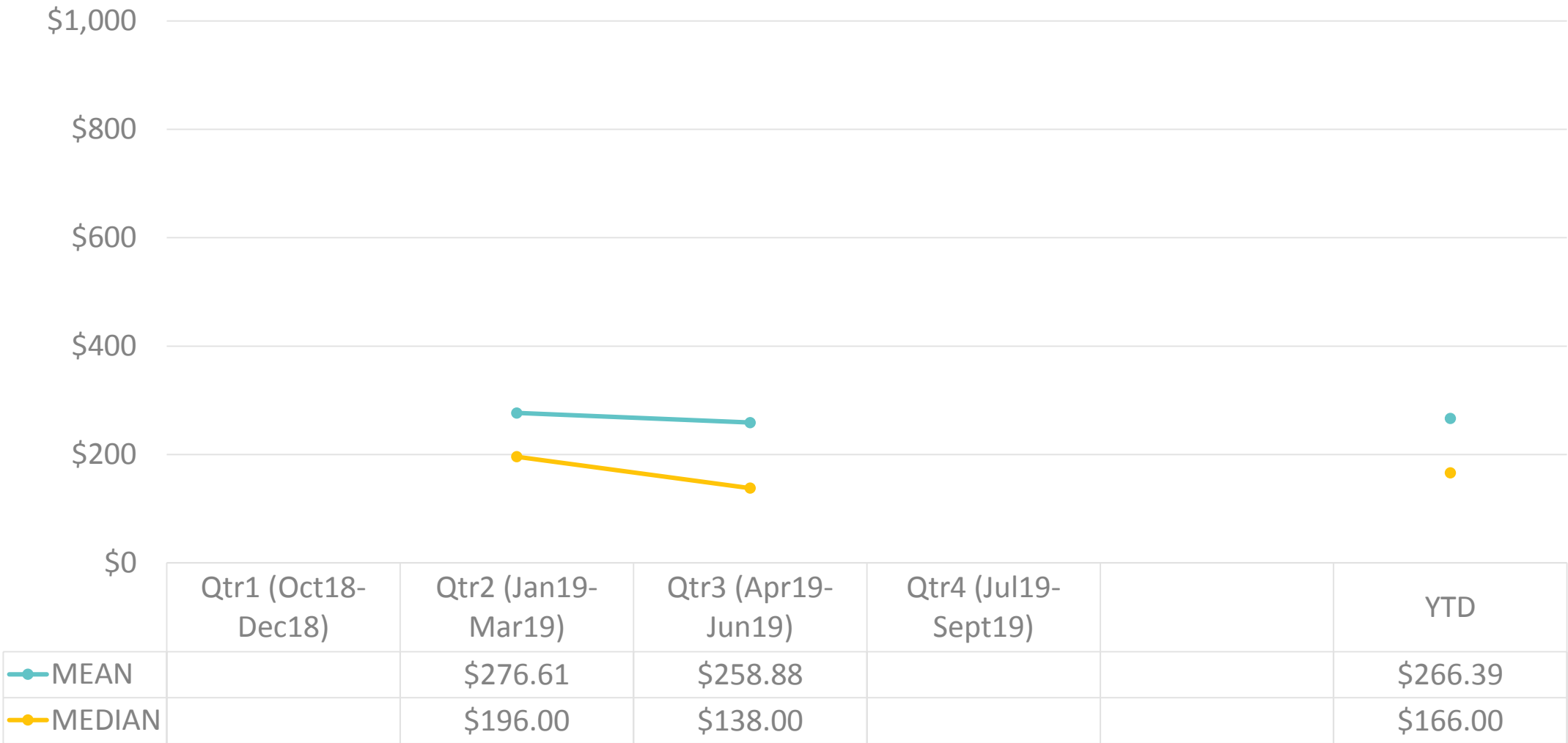
ONISLE – PER PERSON TRACKING



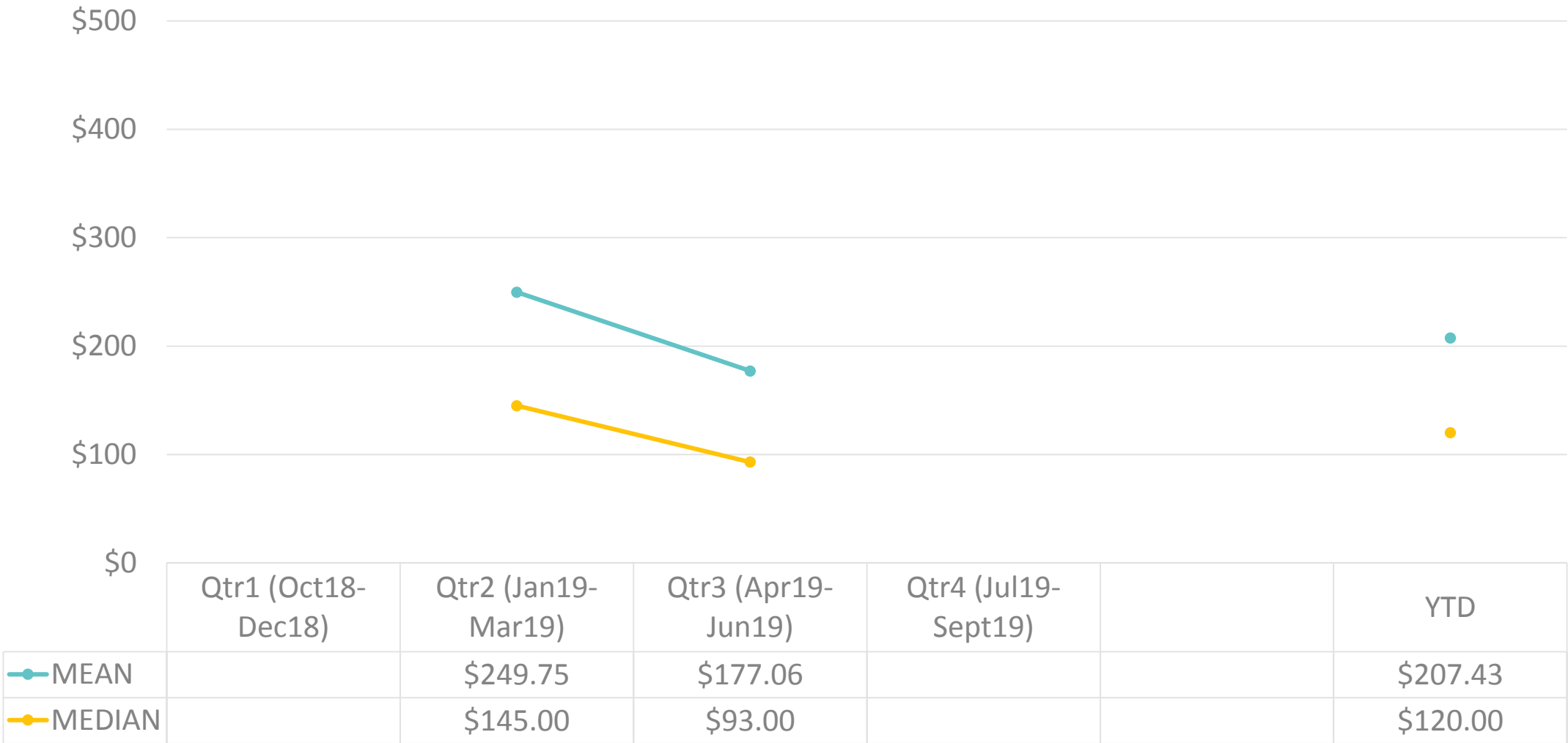
ONISLE – PER DAY SPENDING



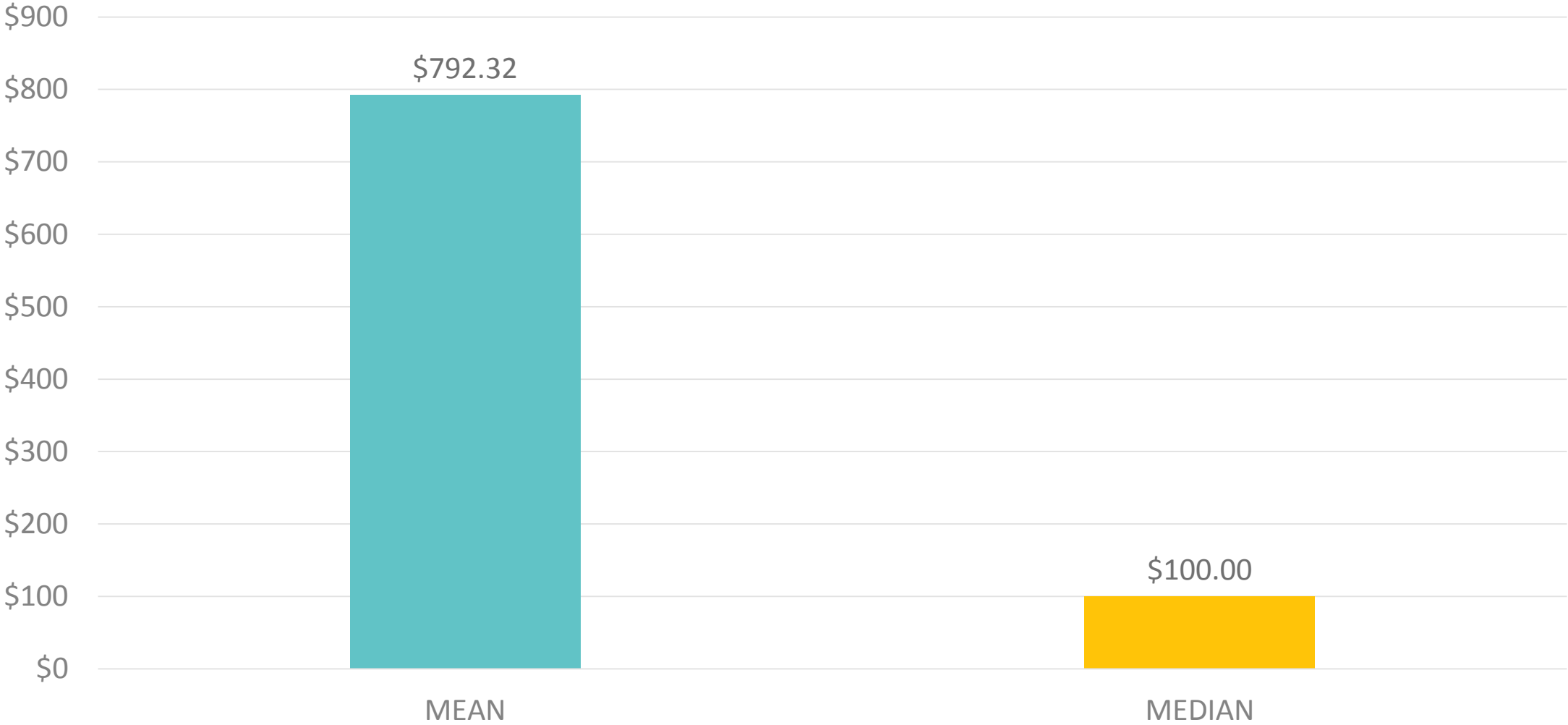
ONISLE – TRAVEL PARTY/ PER DAY TRACKING



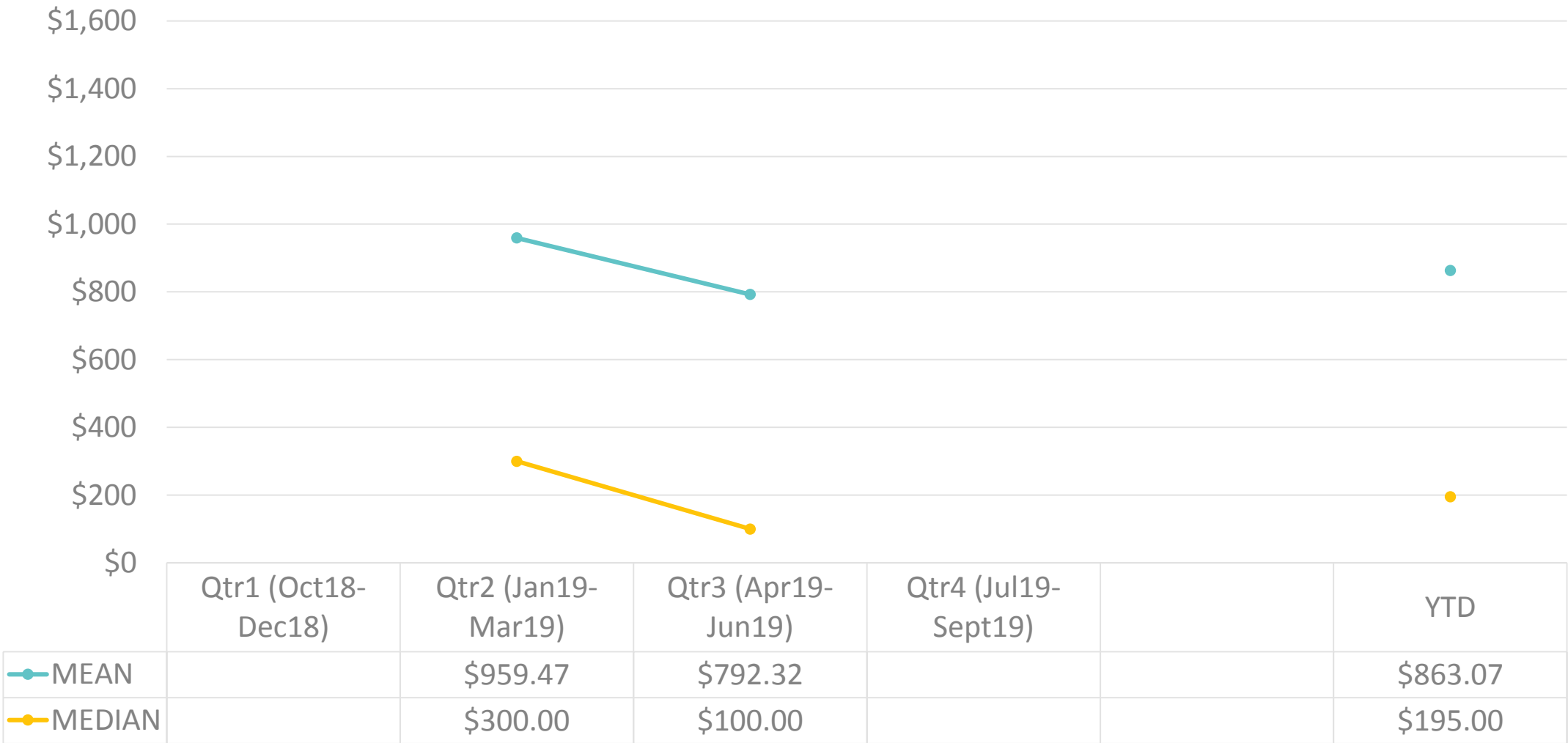
ONISLE – PER PERSON/ PER DAY TRACKING



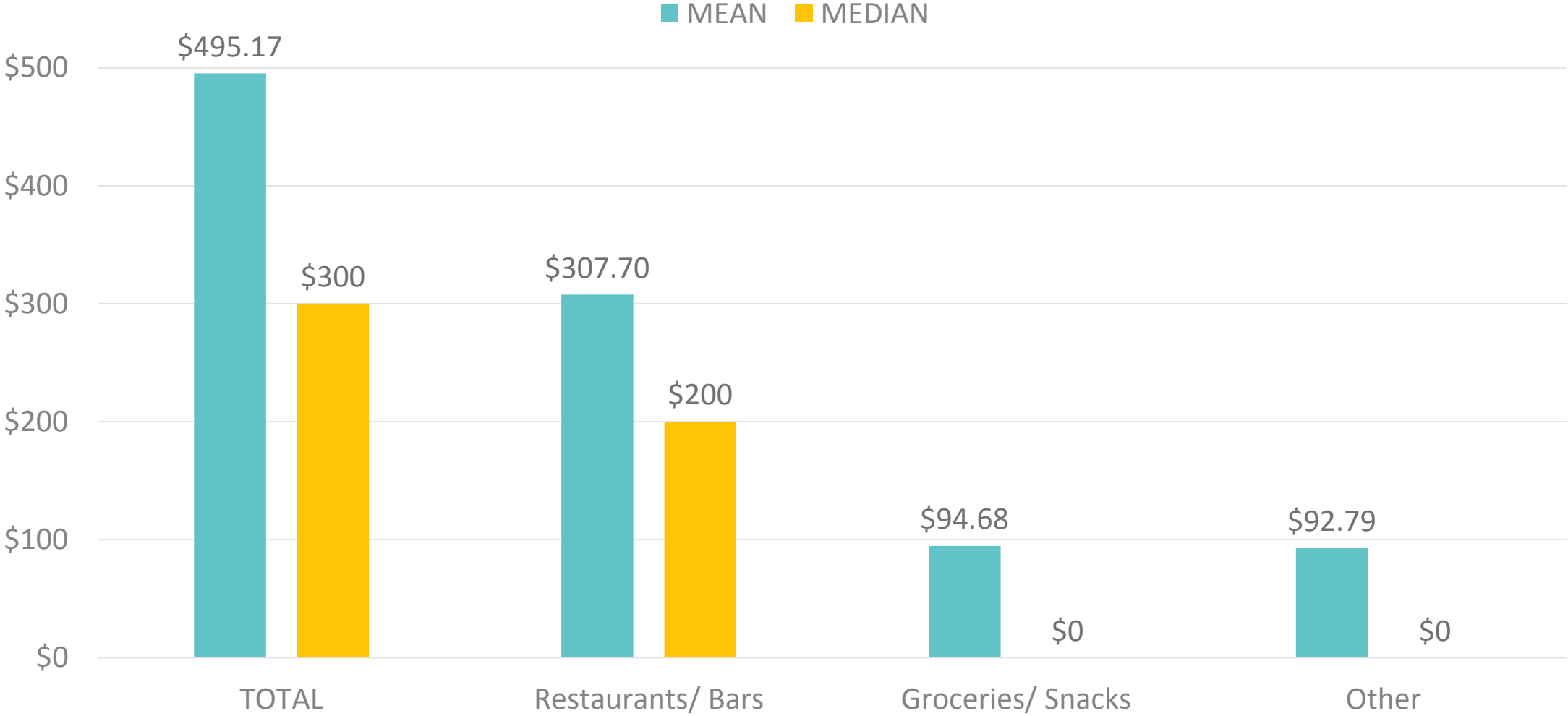
ONISLE – ACCOMMODATIONS



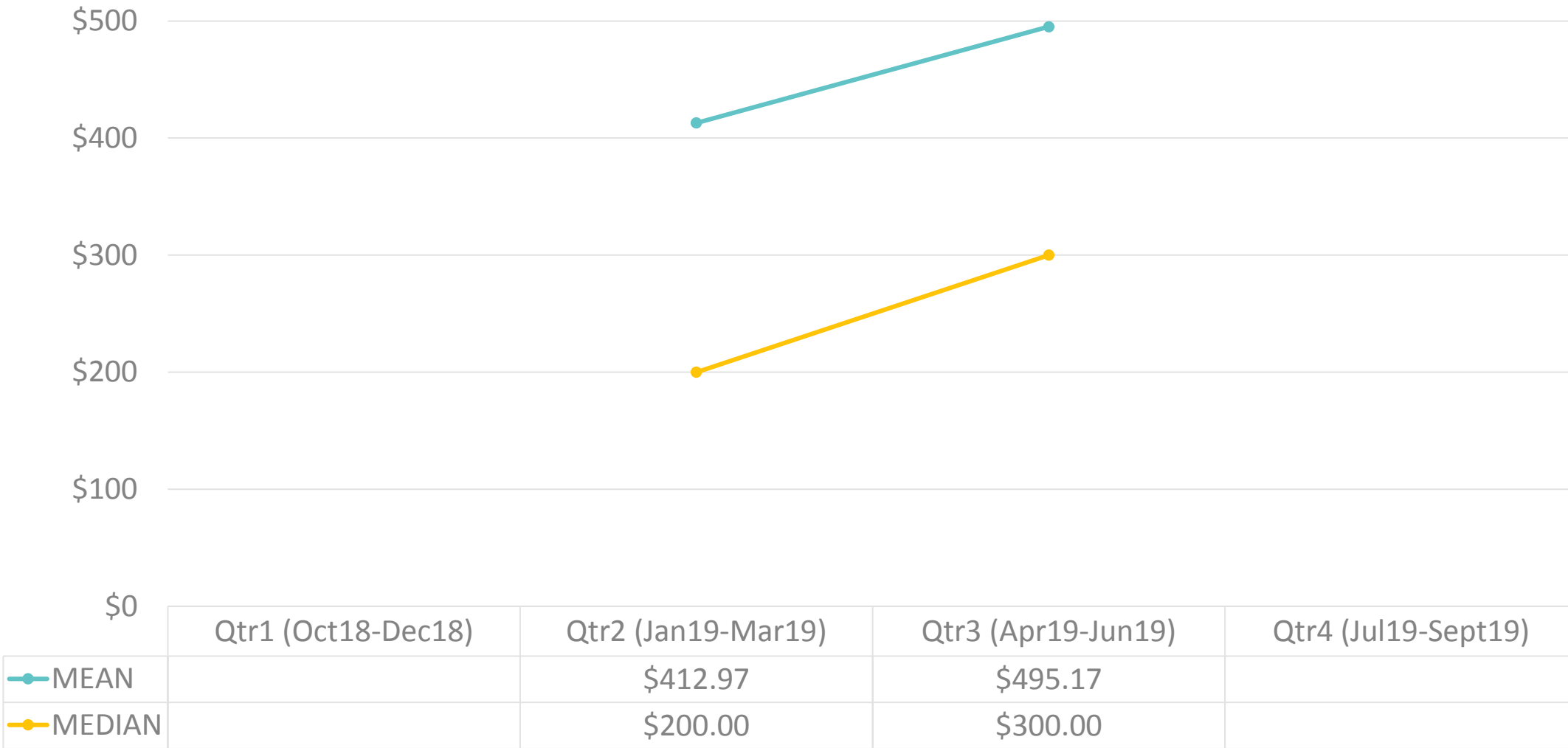
ONISLE – ACCOMMODATIONS TRACKING



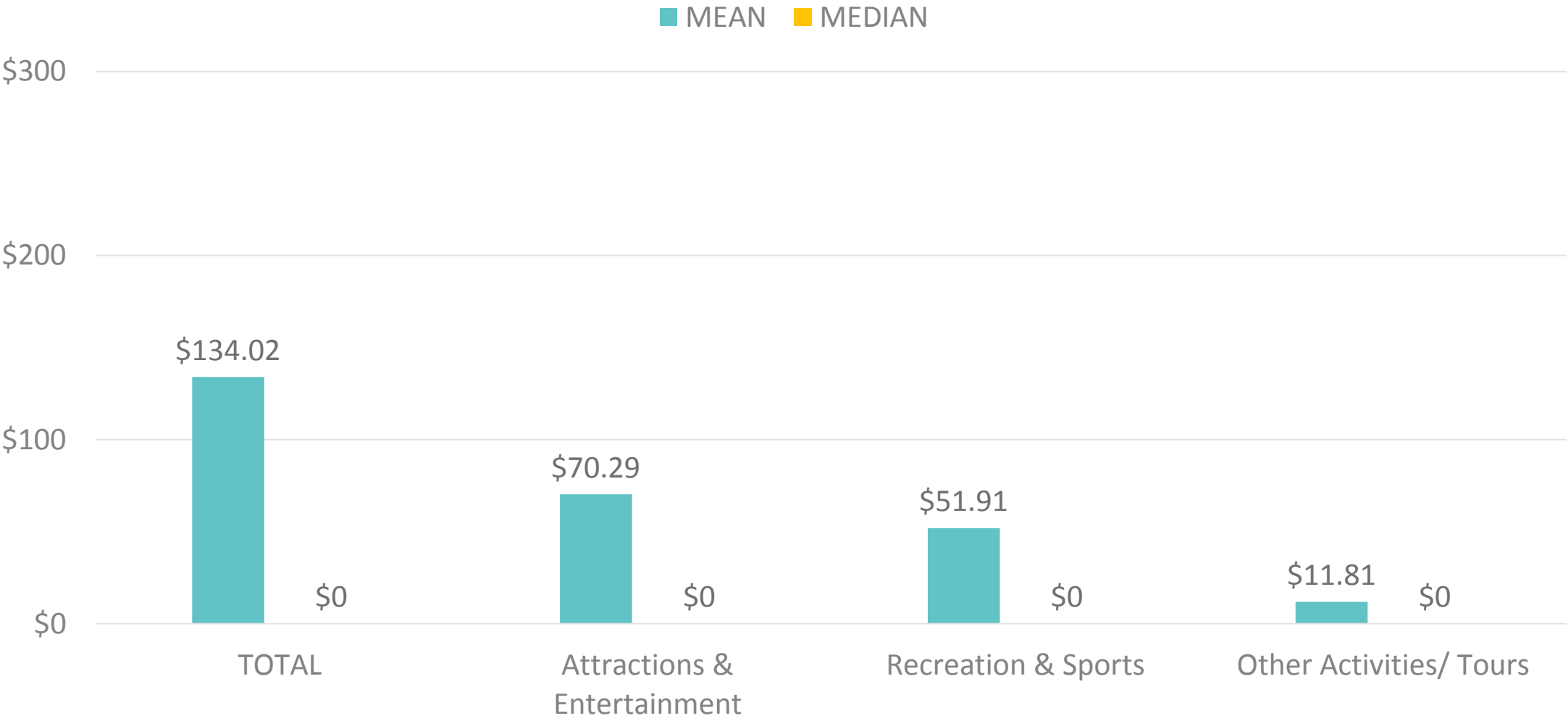
ONISLE – FOOD & BEVERAGE



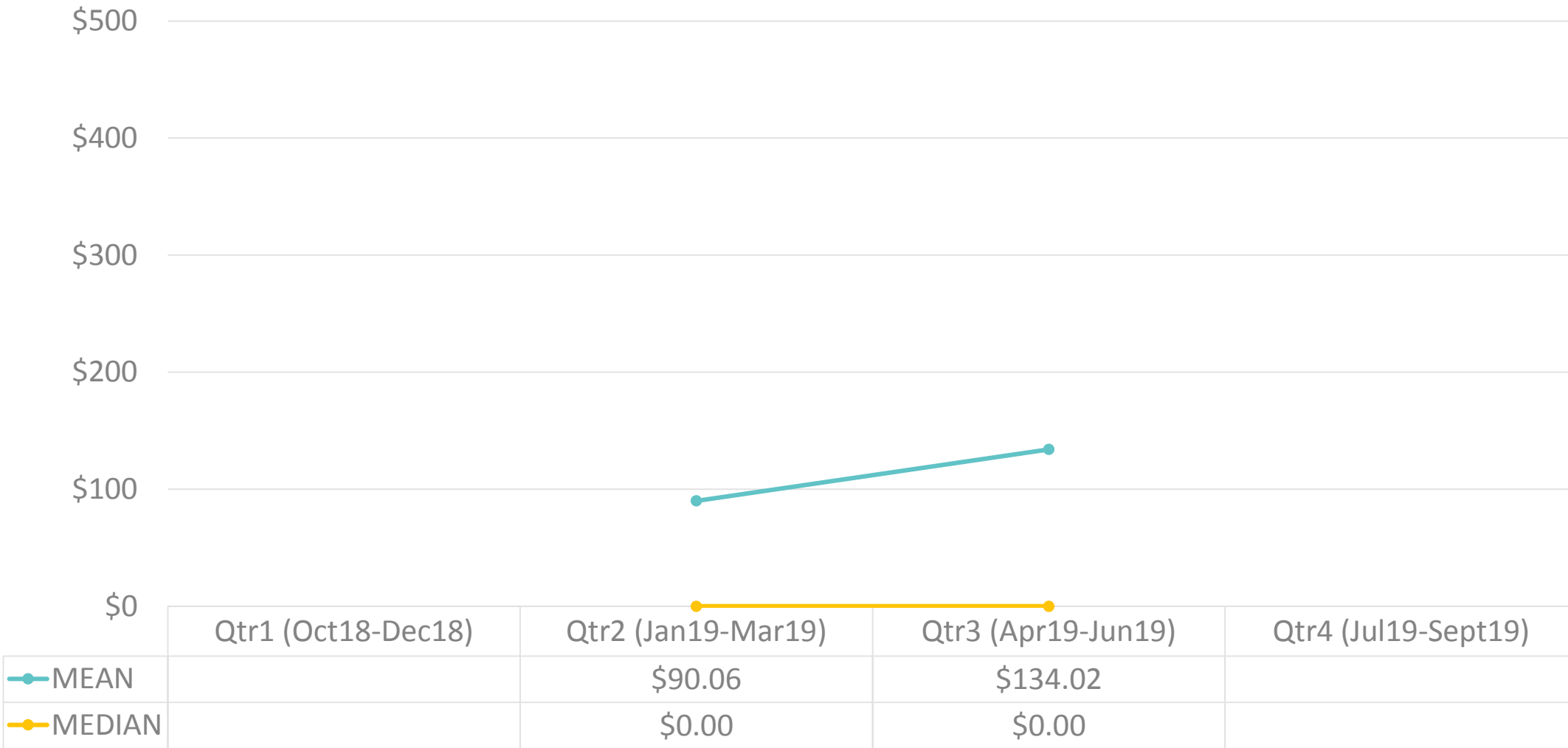
ONISLE – TOTAL FOOD & BEVERAGE TRACKING



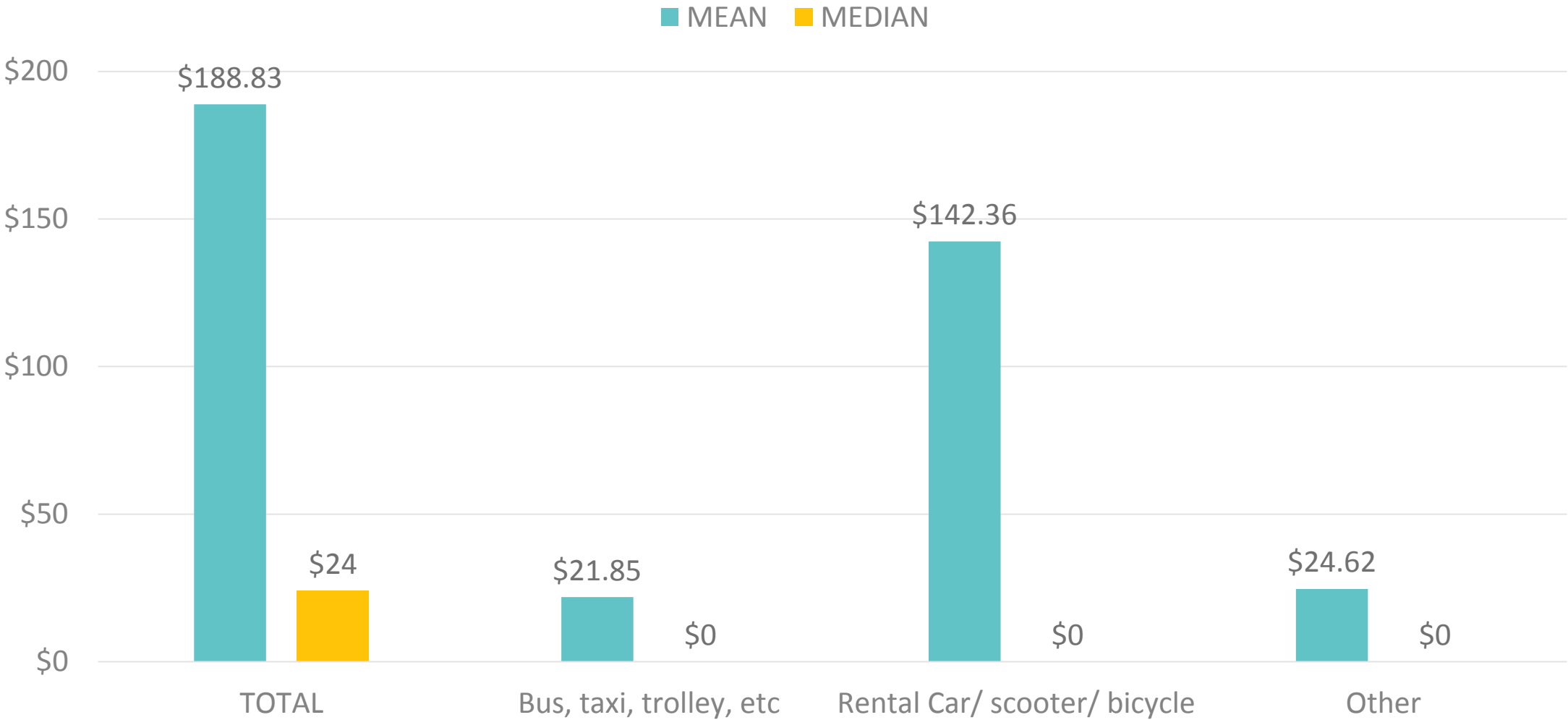
ONISLE – ENTERTAINMENT & RECREATION



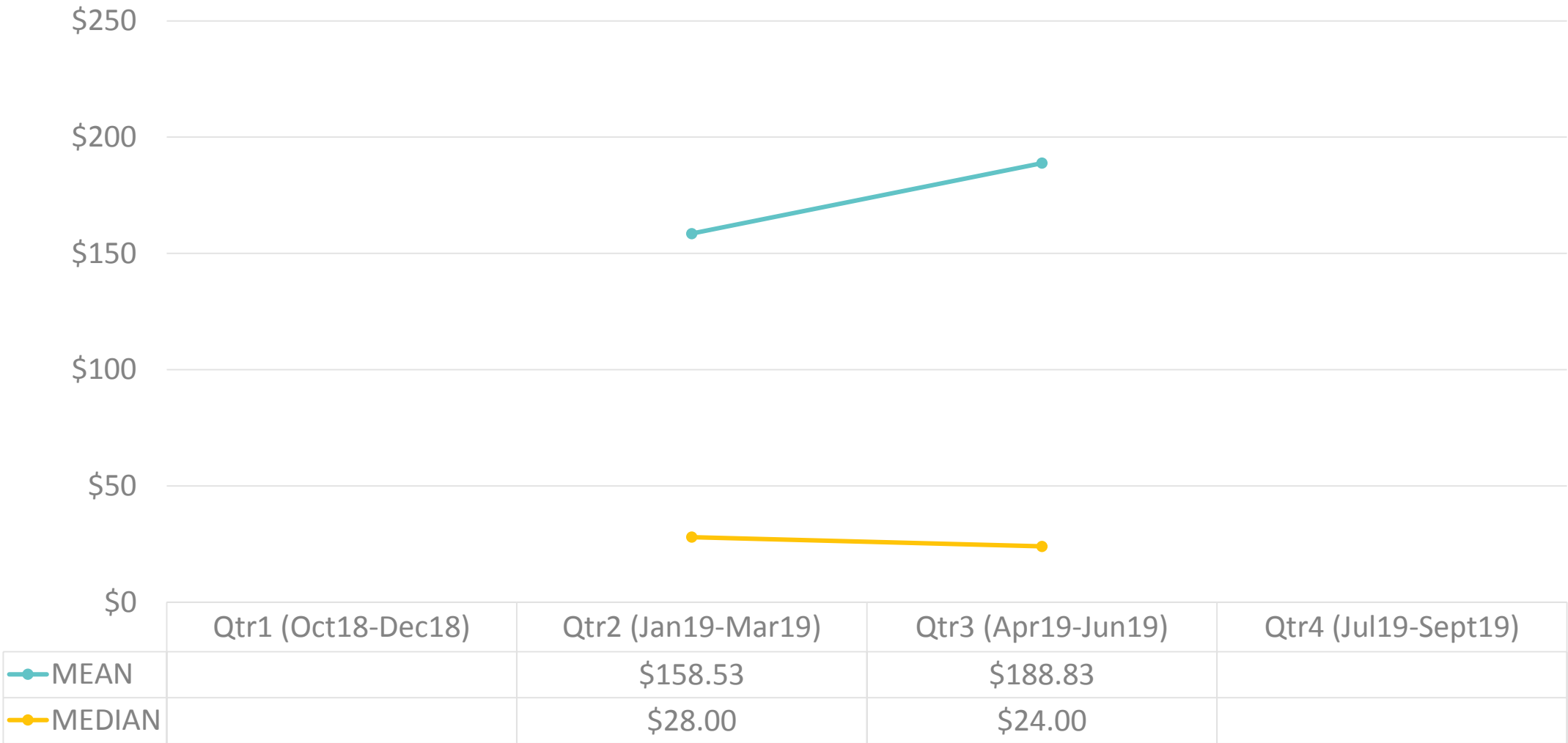
ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING



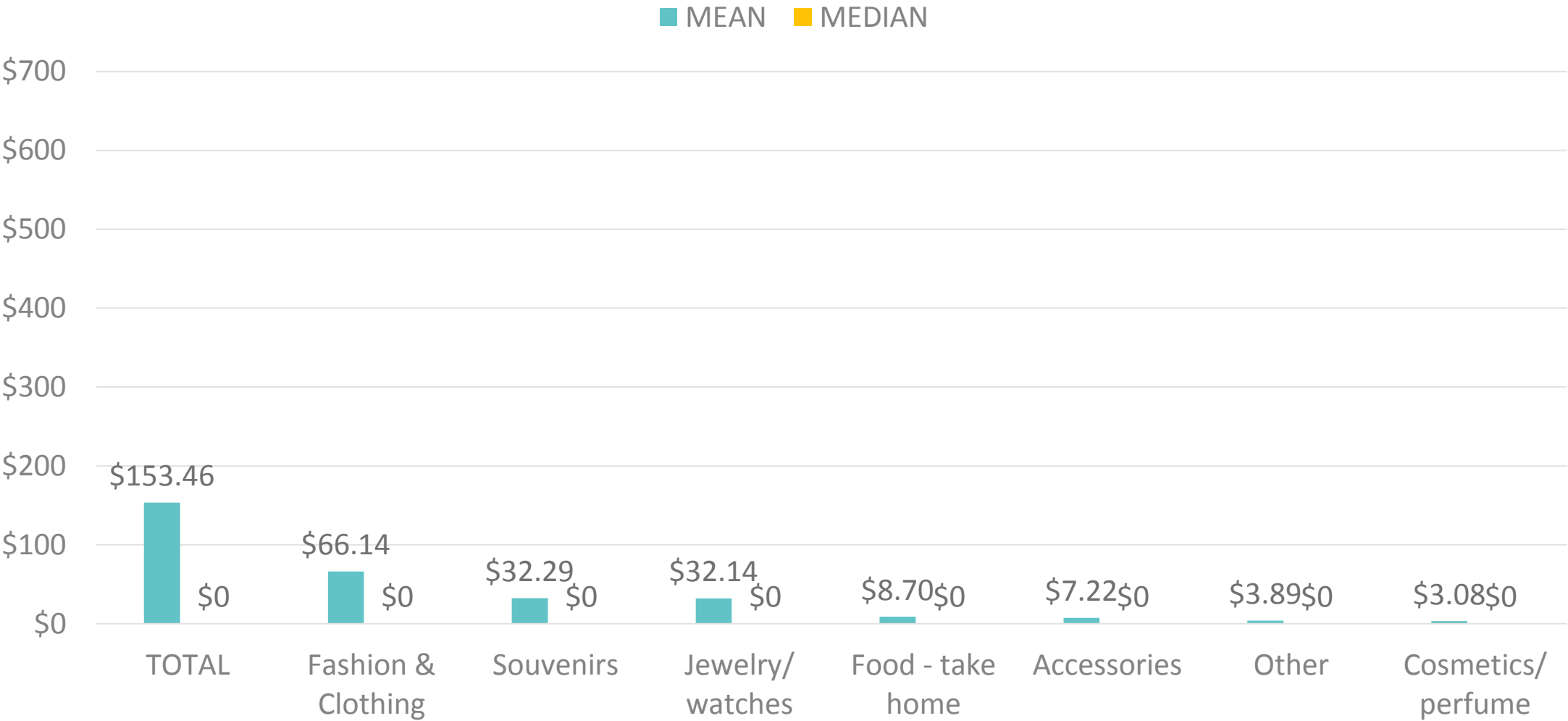
ONISLE – TRANSPORTATION



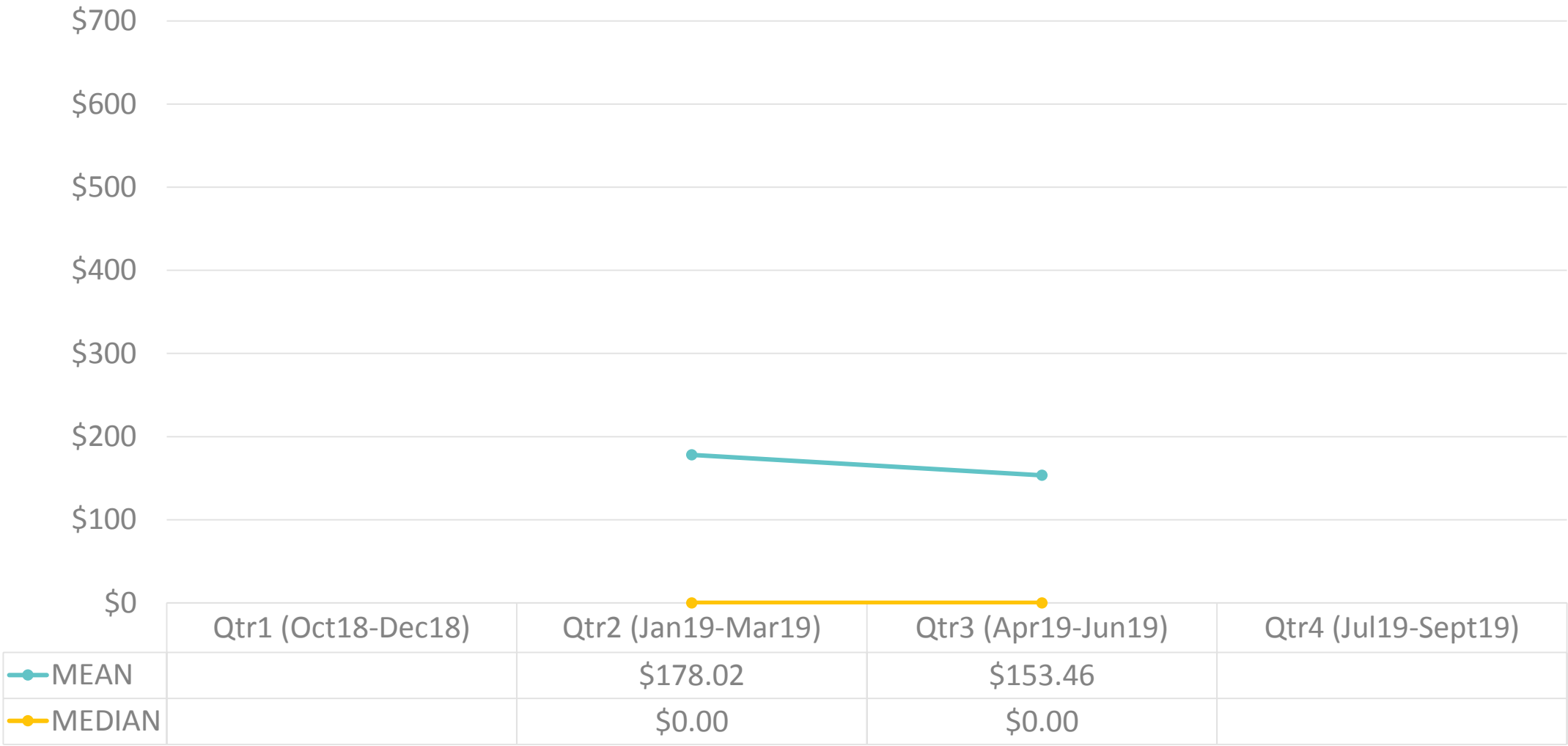
ONISLE – TOTAL TRANSPORTATION TRACKING



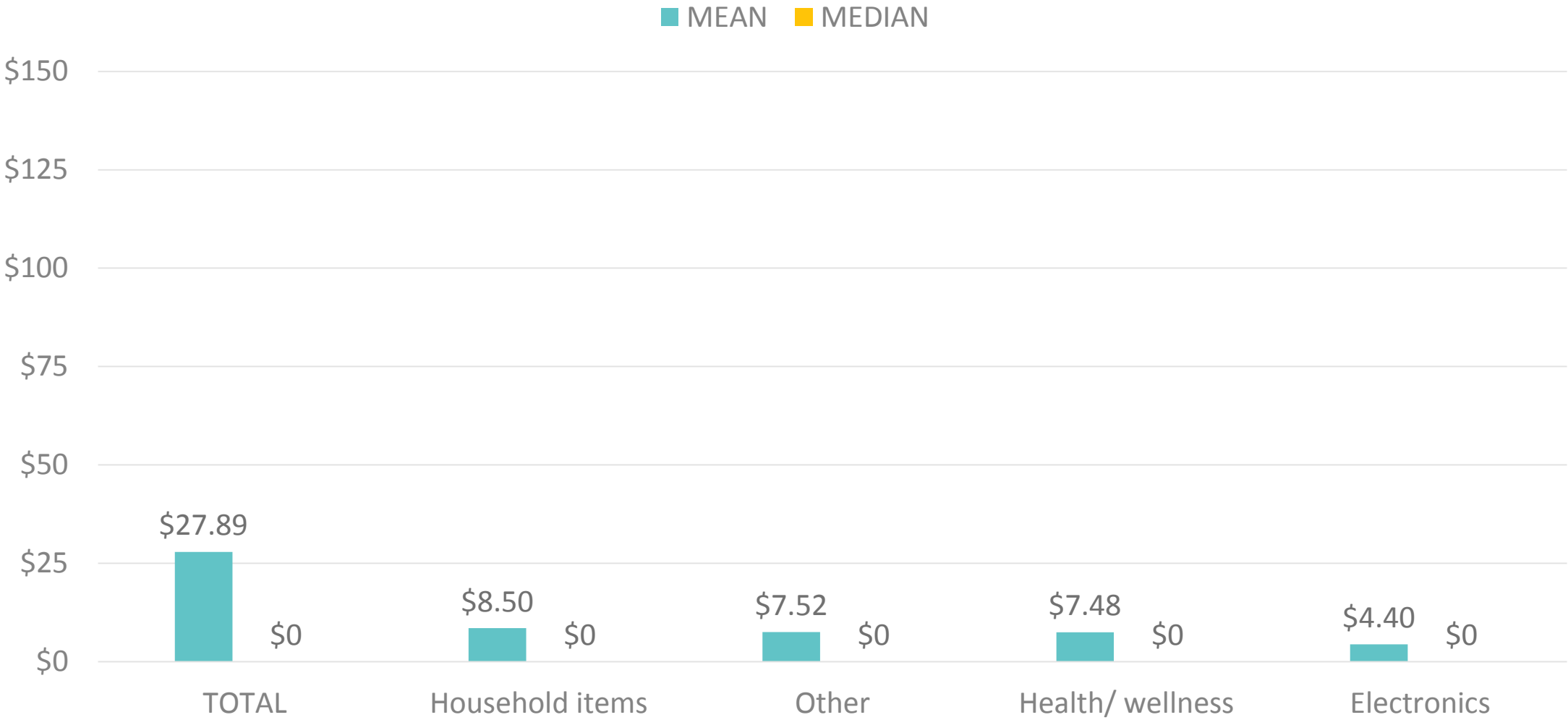
ONISLE – SHOPPING



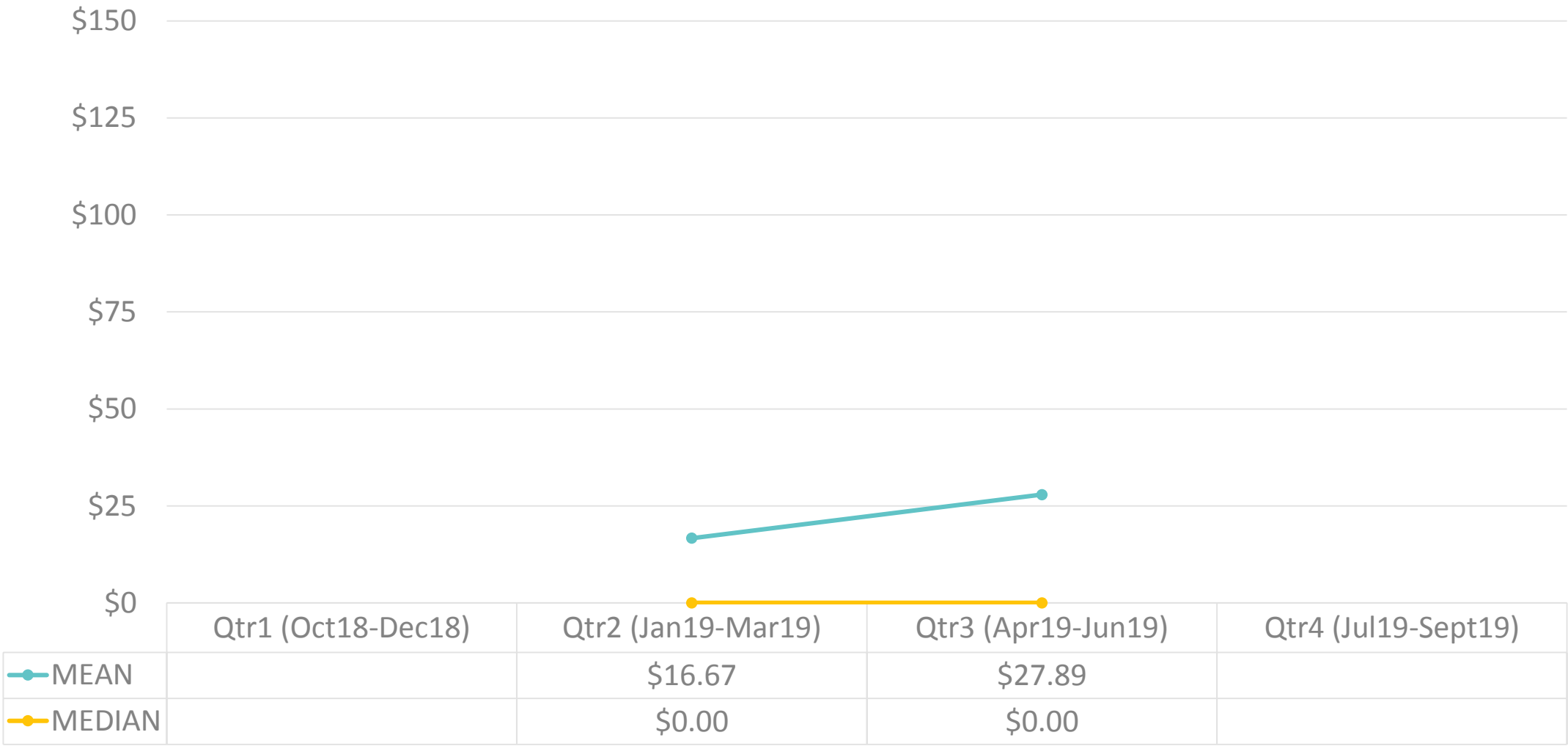
ONISLE – TOTAL SHOPPING TRACKING



ONISLE – MISCELLANEOUS



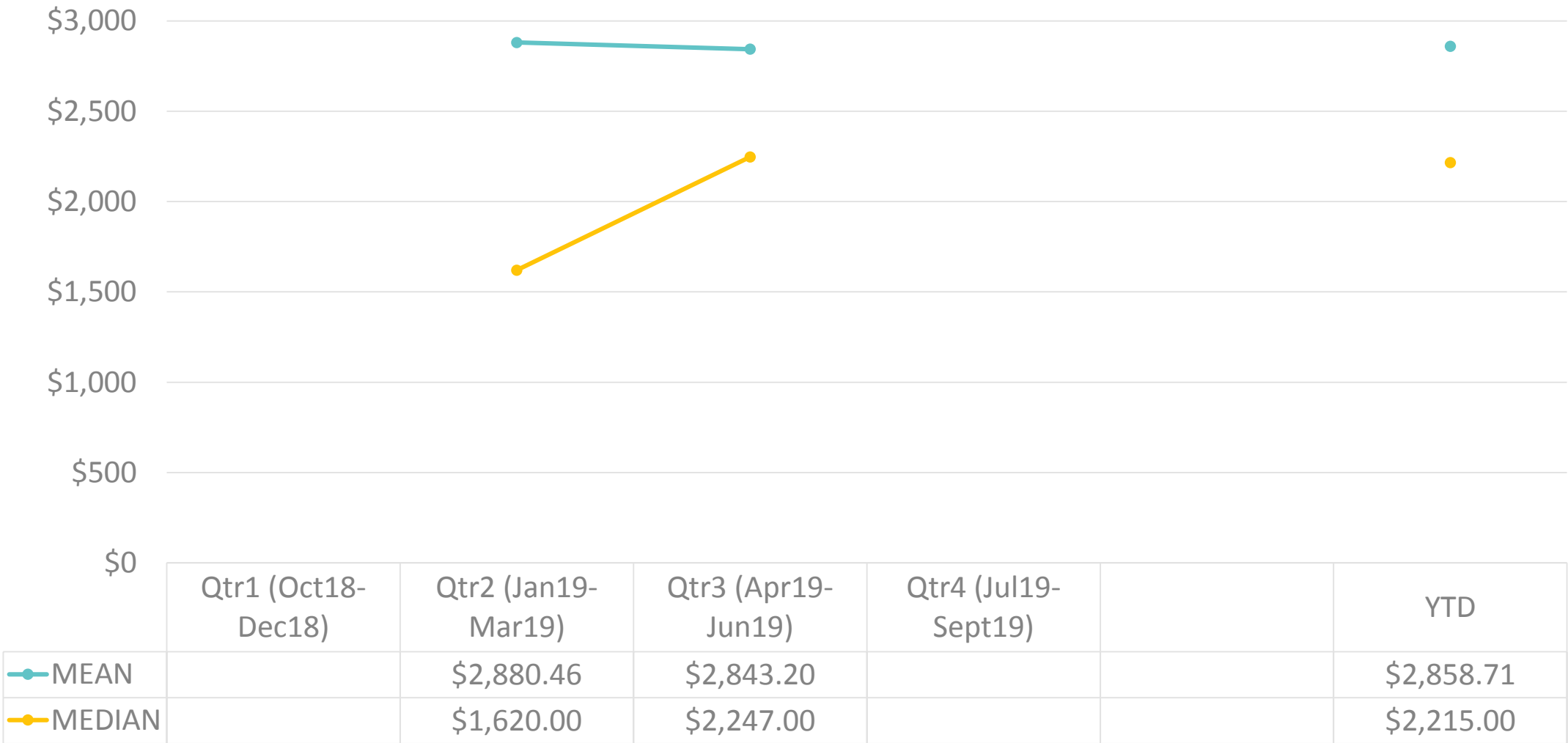
ONISLE – MISCELLANEOUS TRACKING



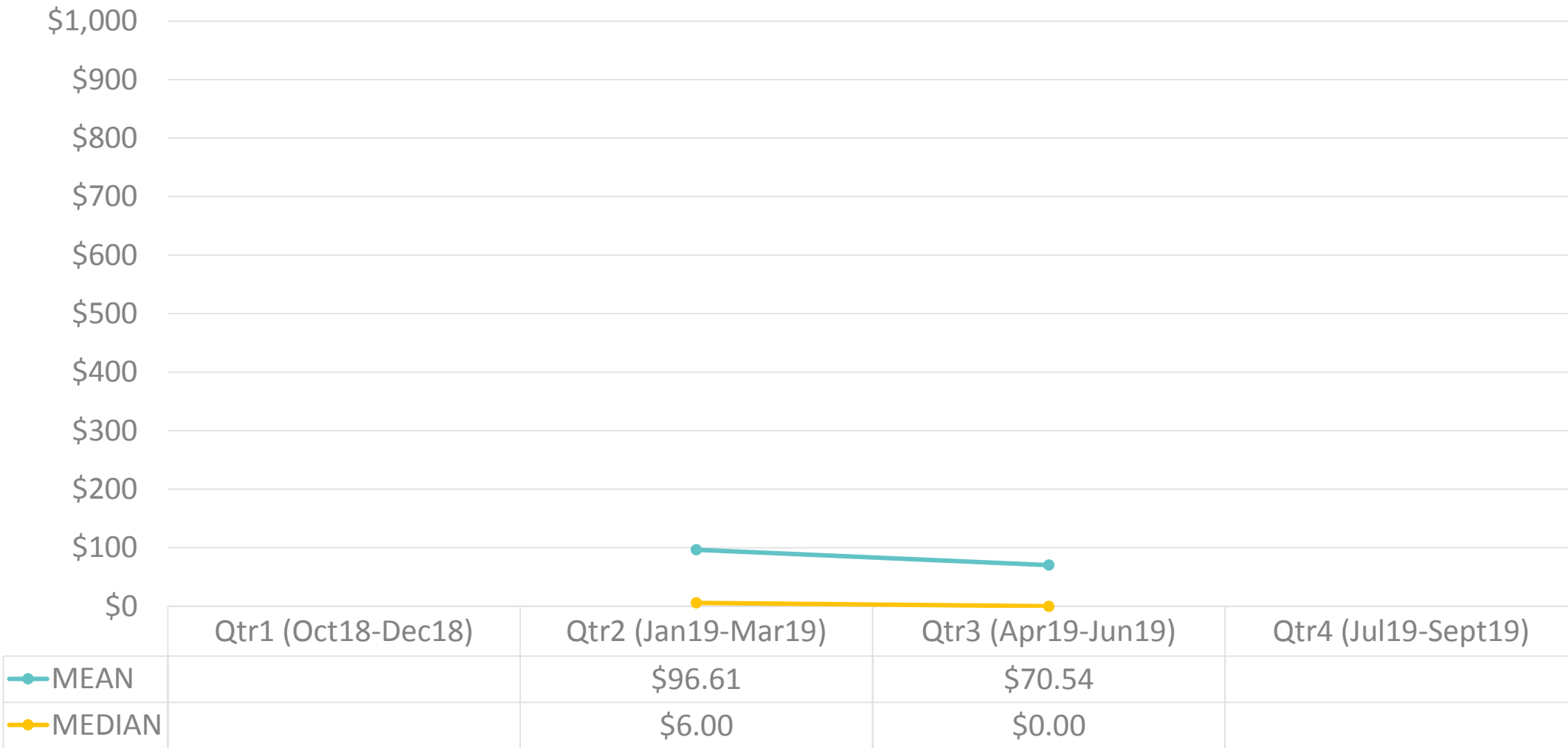
TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

- \$2,843.20 = Mean average per person
- \$2,247.00 = Median amount spent per person

TOTAL EXPENDITURES PER PERSON TRACKING



GUAM AIRPORT EXPENDITURE TRACKING



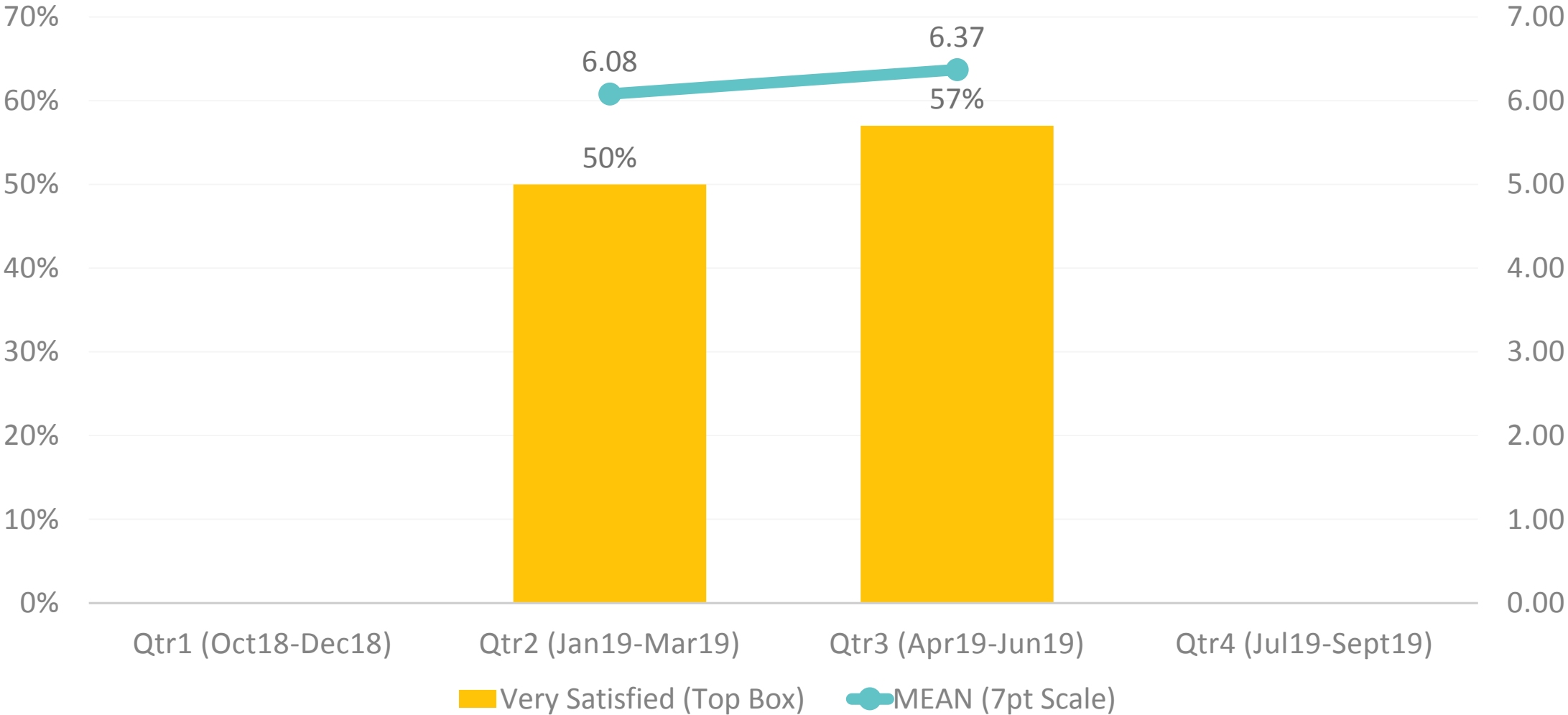


SECTION 4

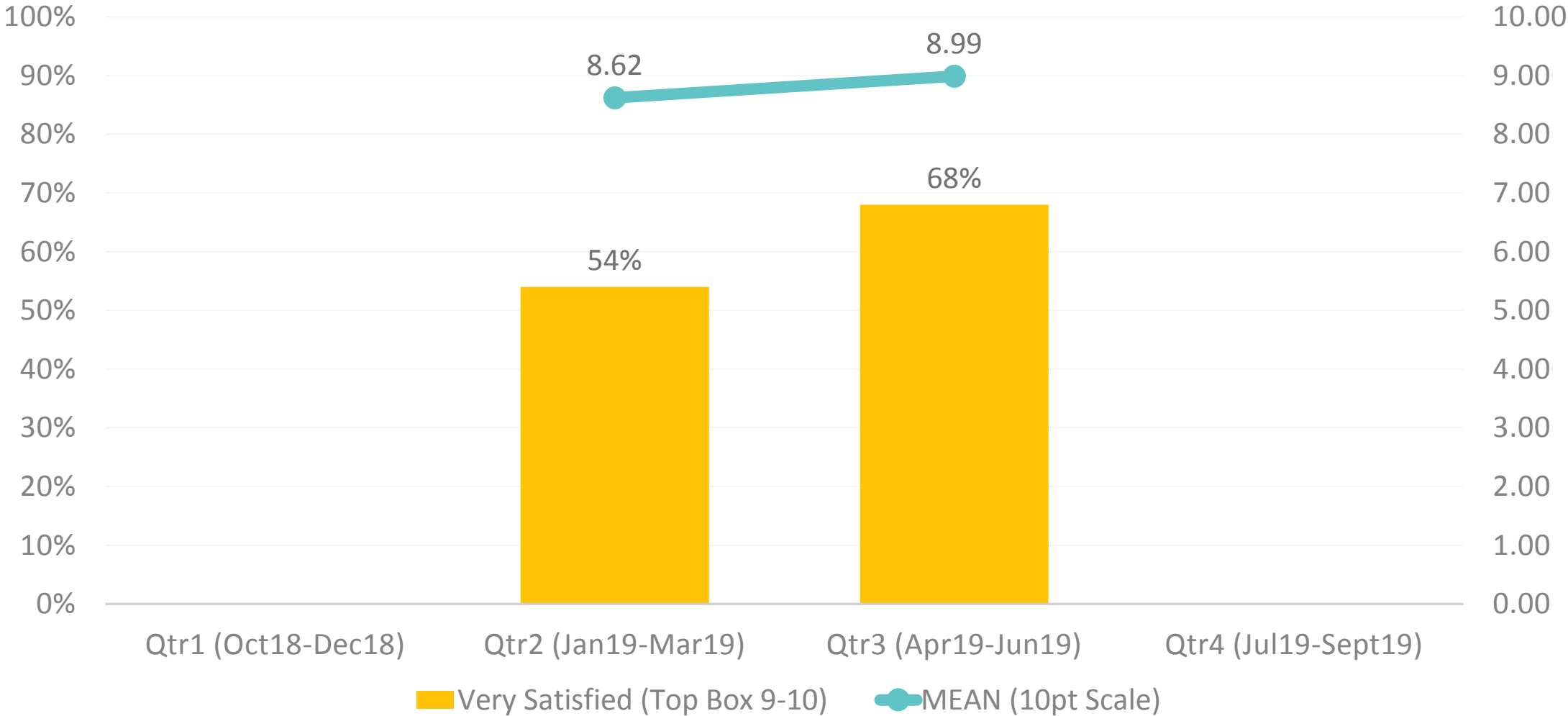
VISITOR SATISFACTION



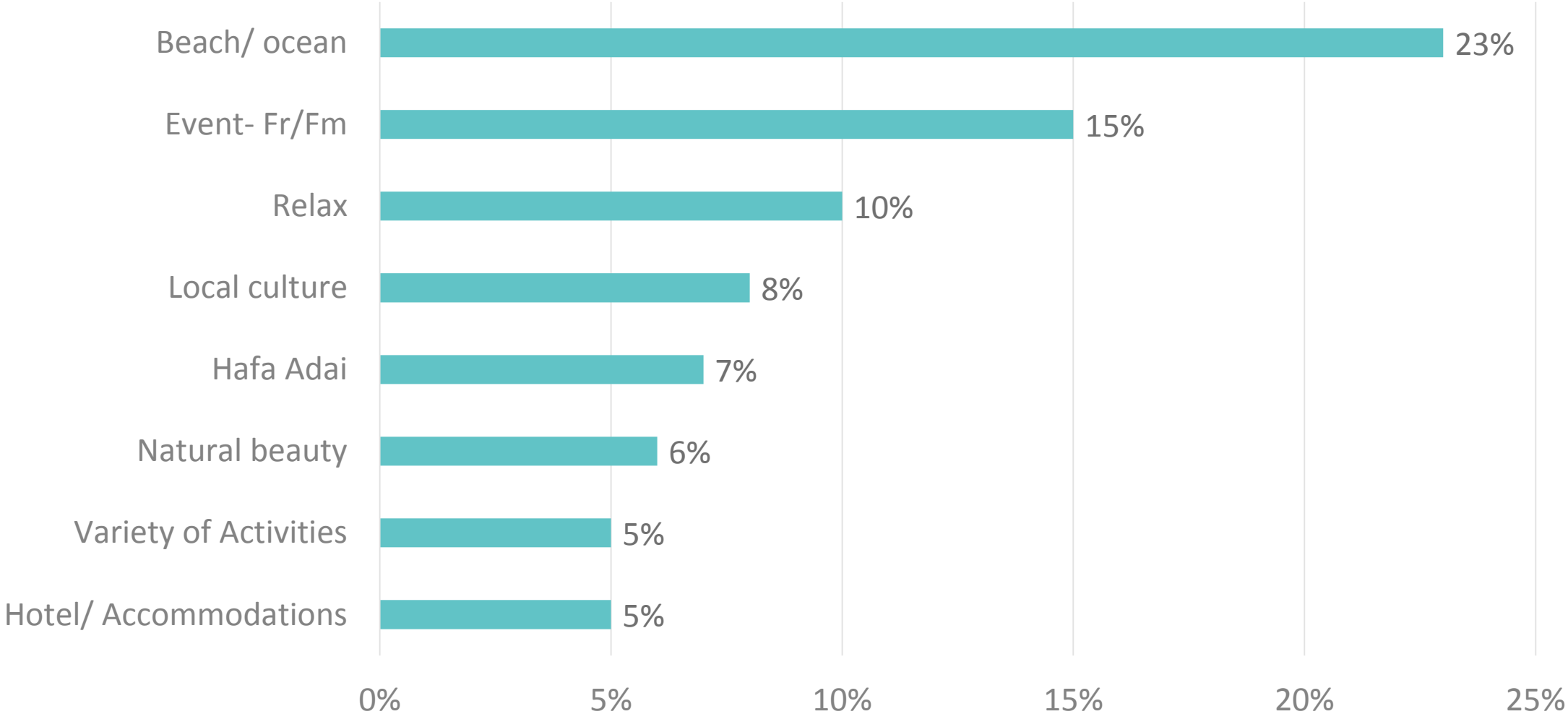
OVERALL SATISFACTION – 7PT SCALE



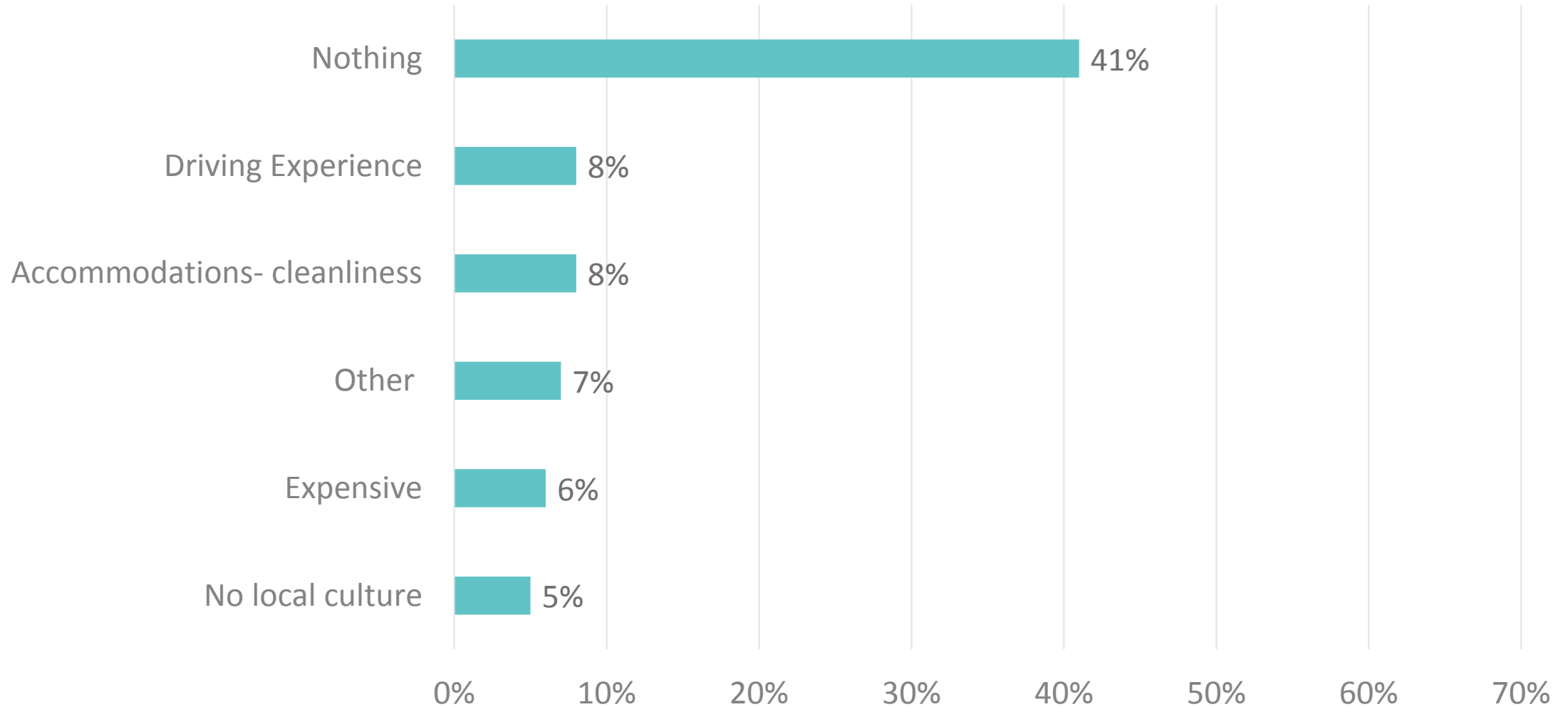
OVERALL SATISFACTION – 10PT SCALE



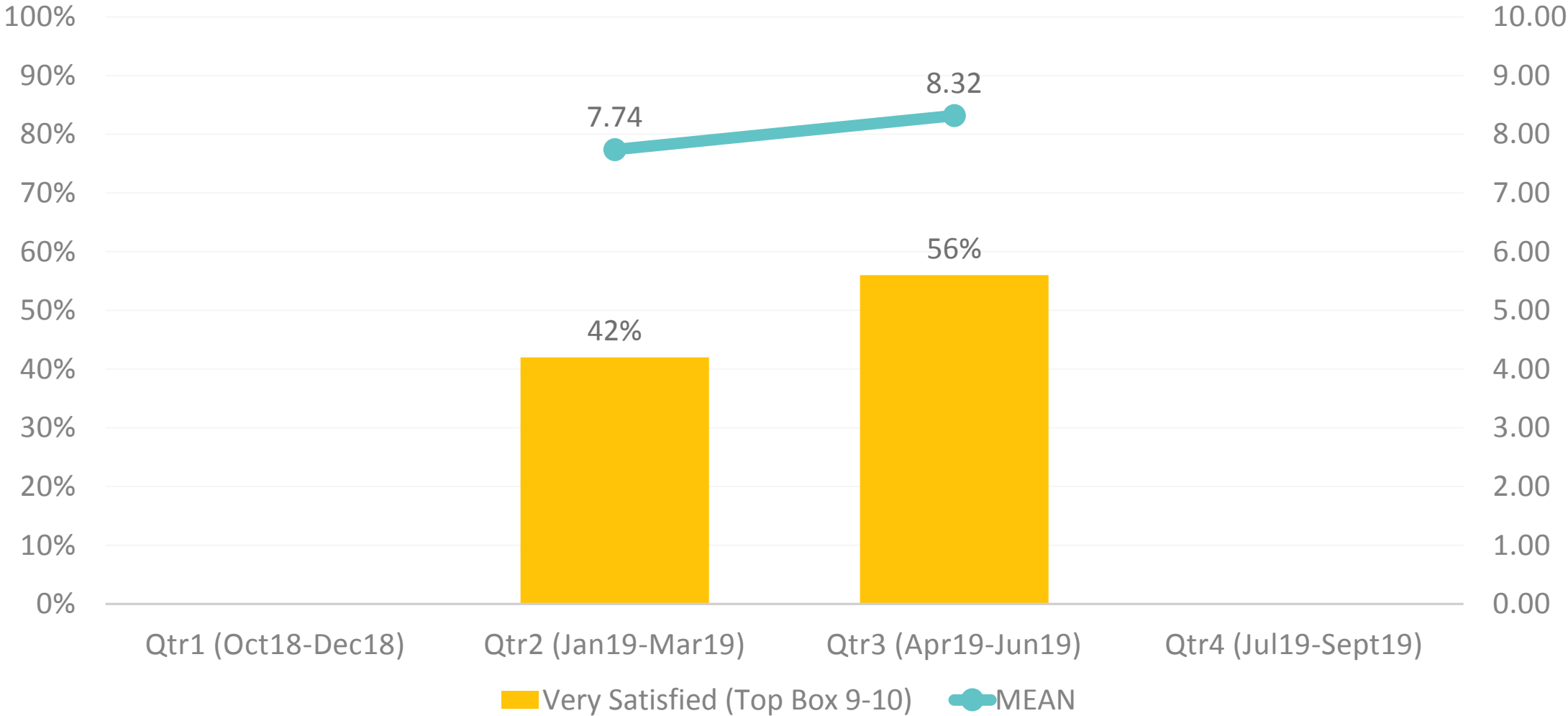
SWOT – POSITIVE ASPECT OF TRIP



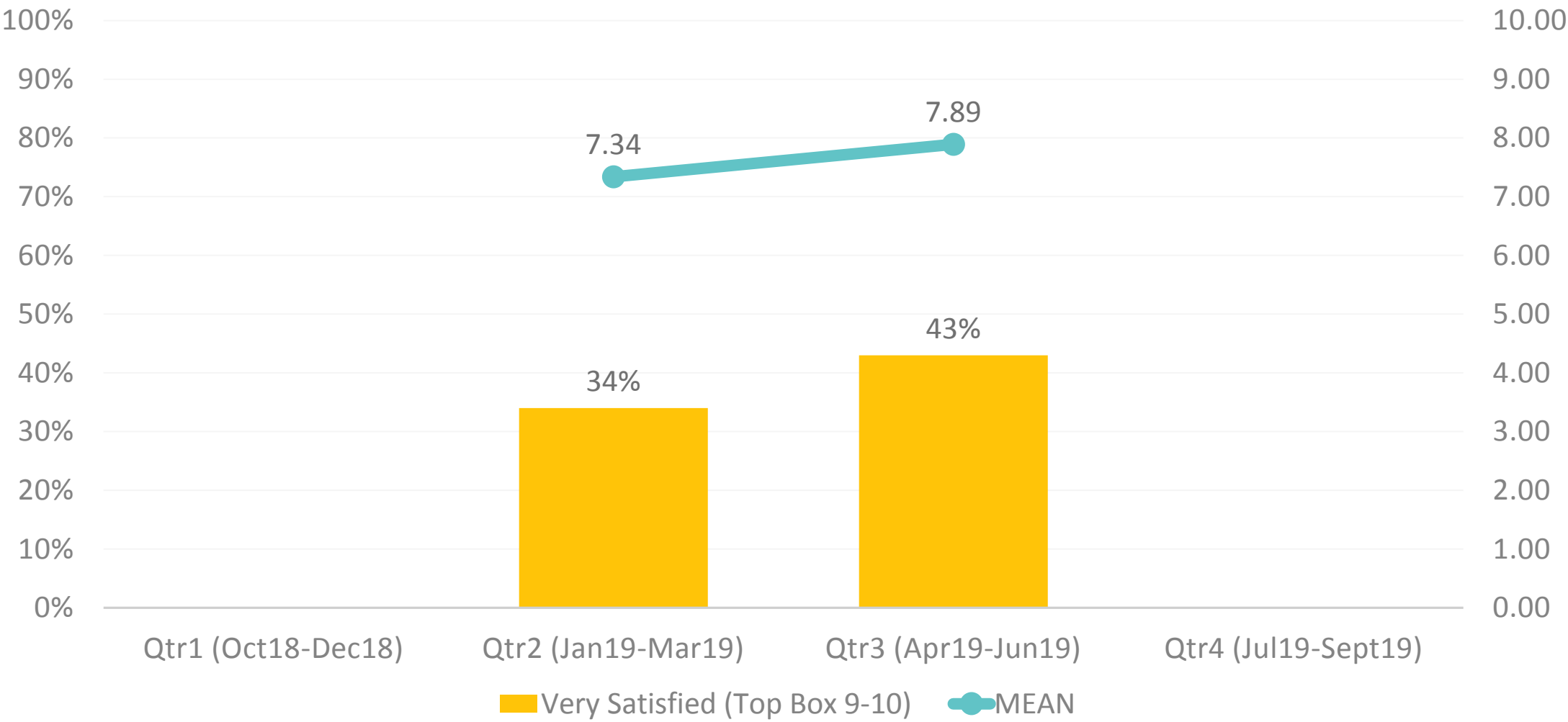
SWOT – NEGATIVE ASPECT OF TRIP



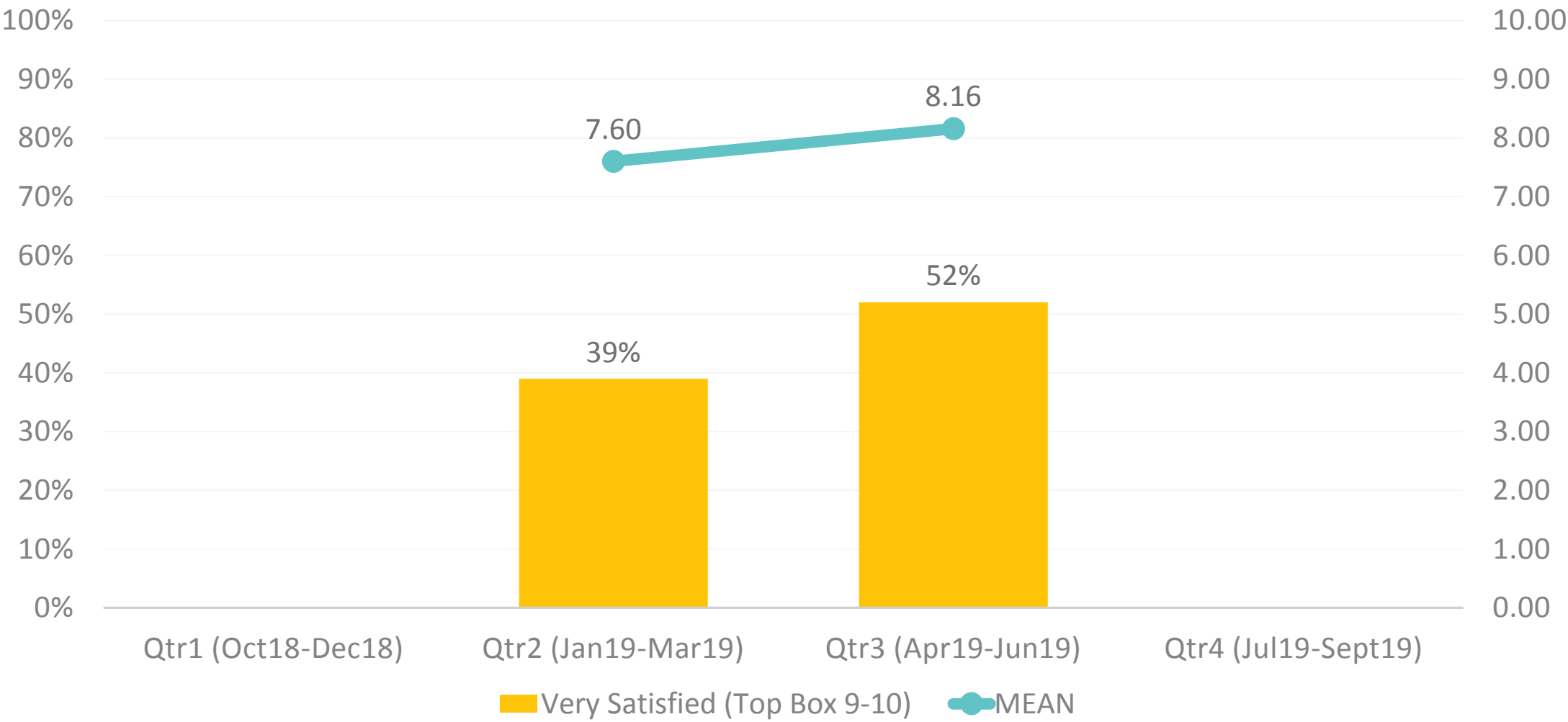
SATISFACTION – ENTERTAINMENT



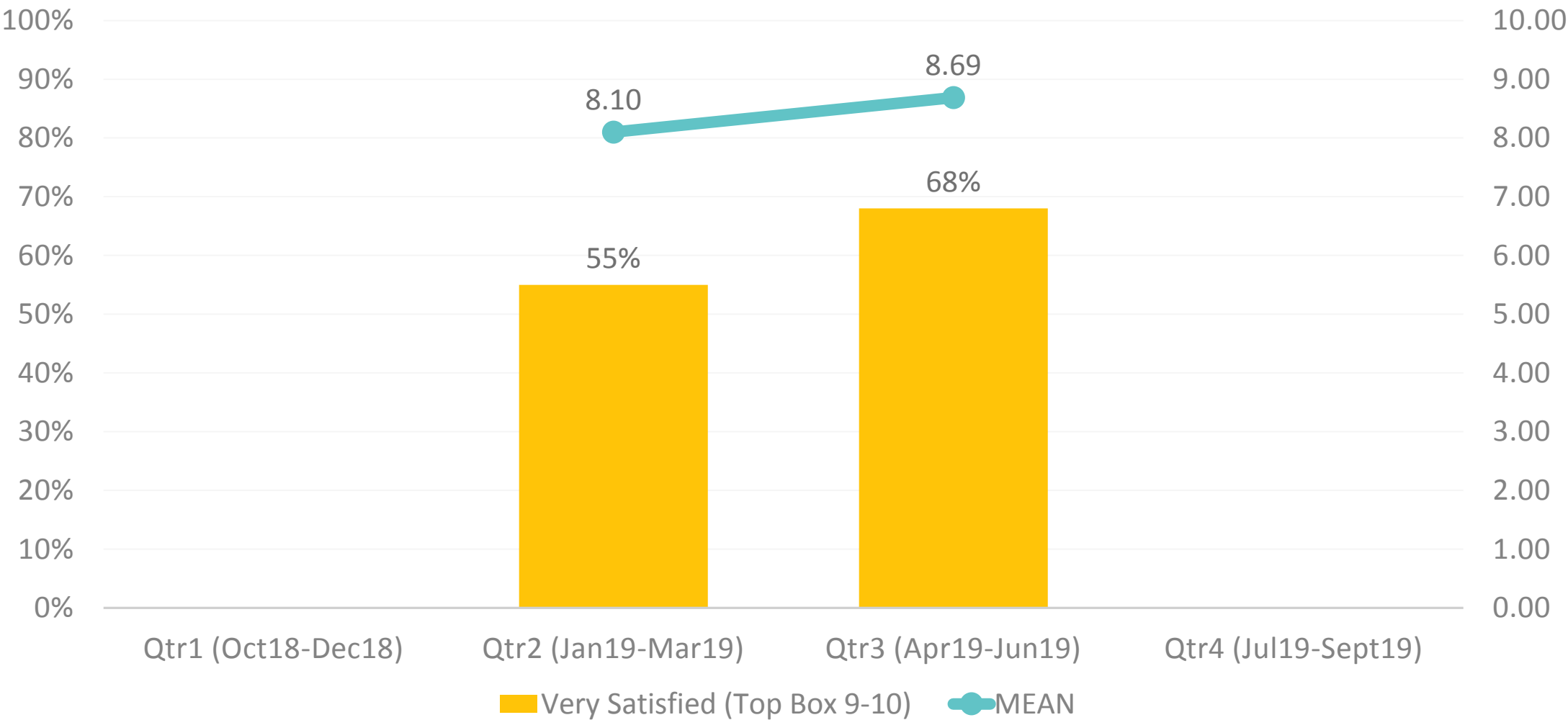
SATISFACTION – SHOPPING



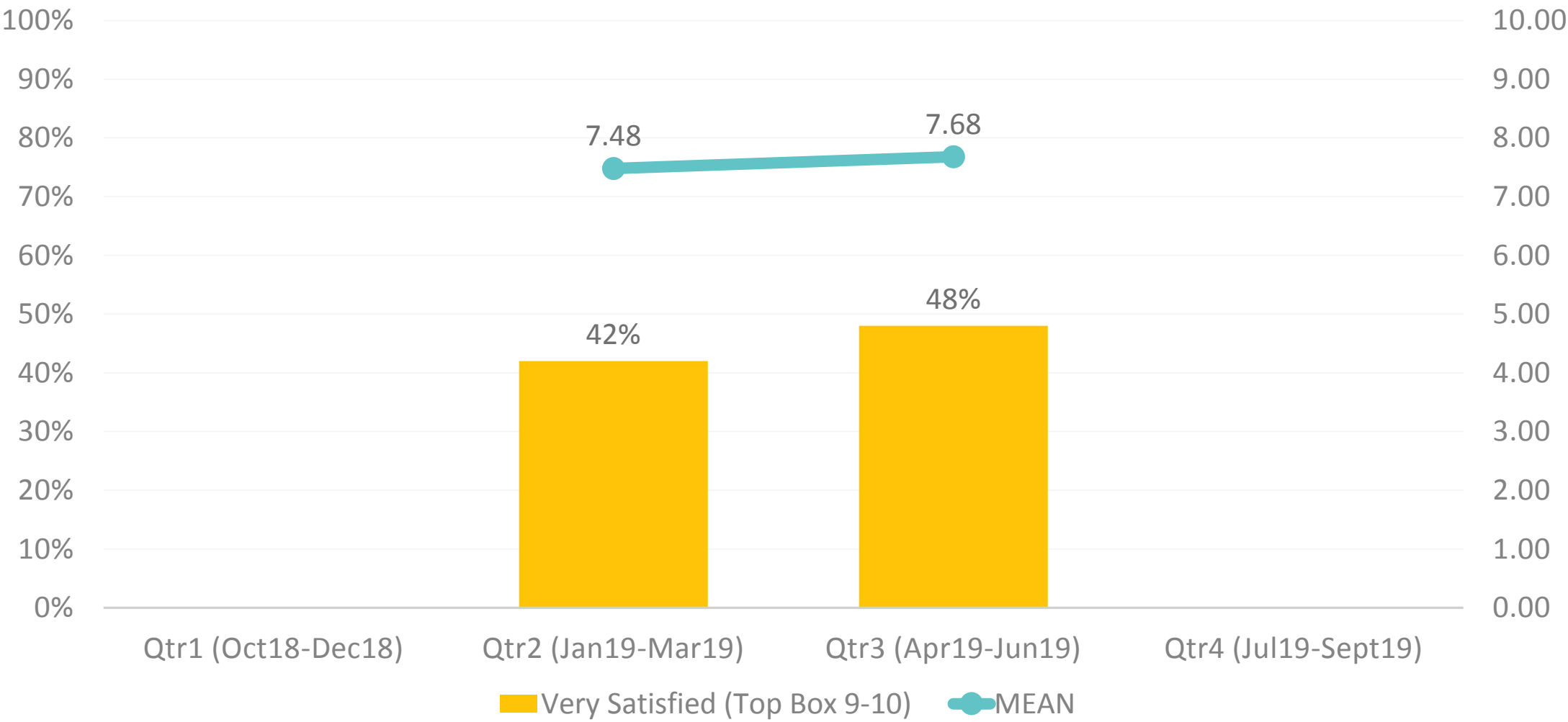
SATISFACTION – DINING



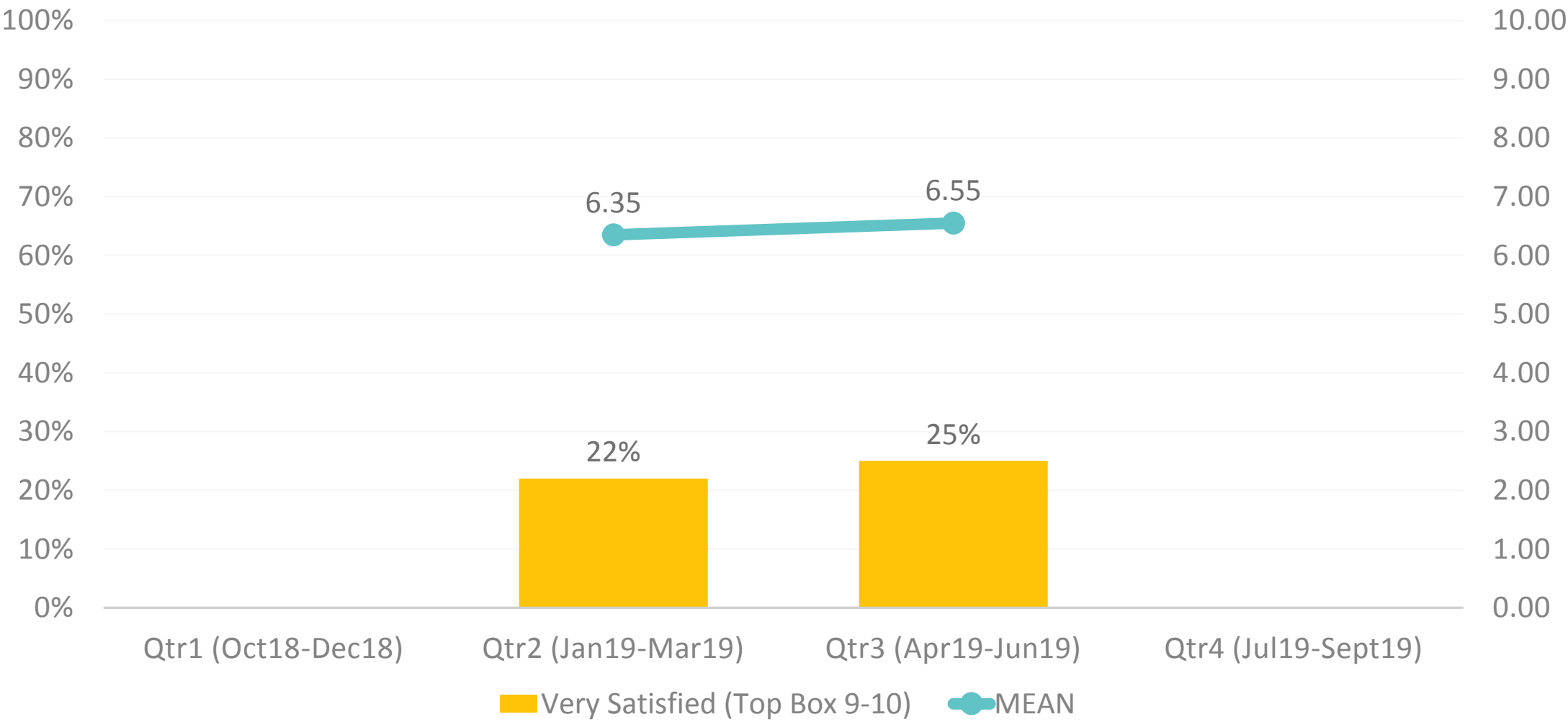
SATISFACTION – BEACHES



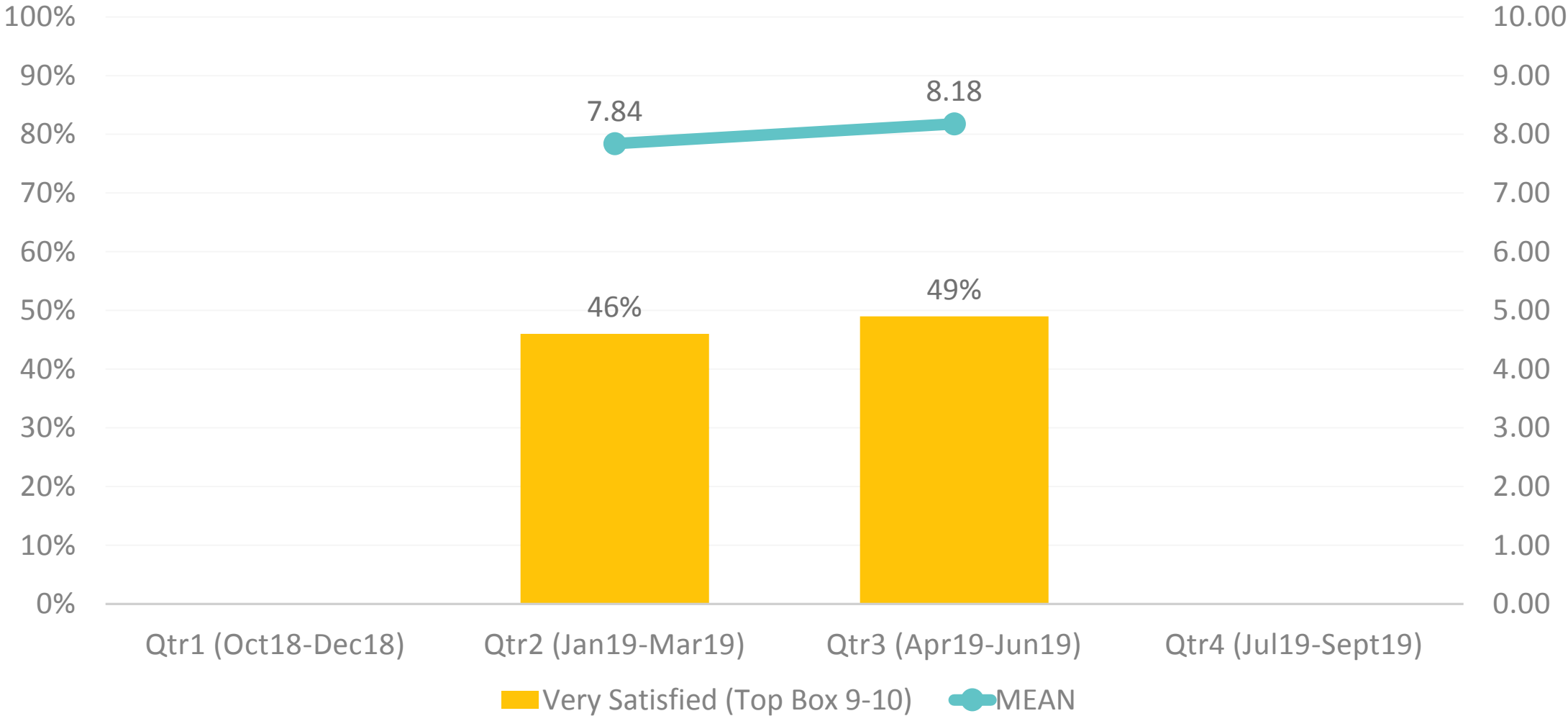
SATISFACTION – PARKS



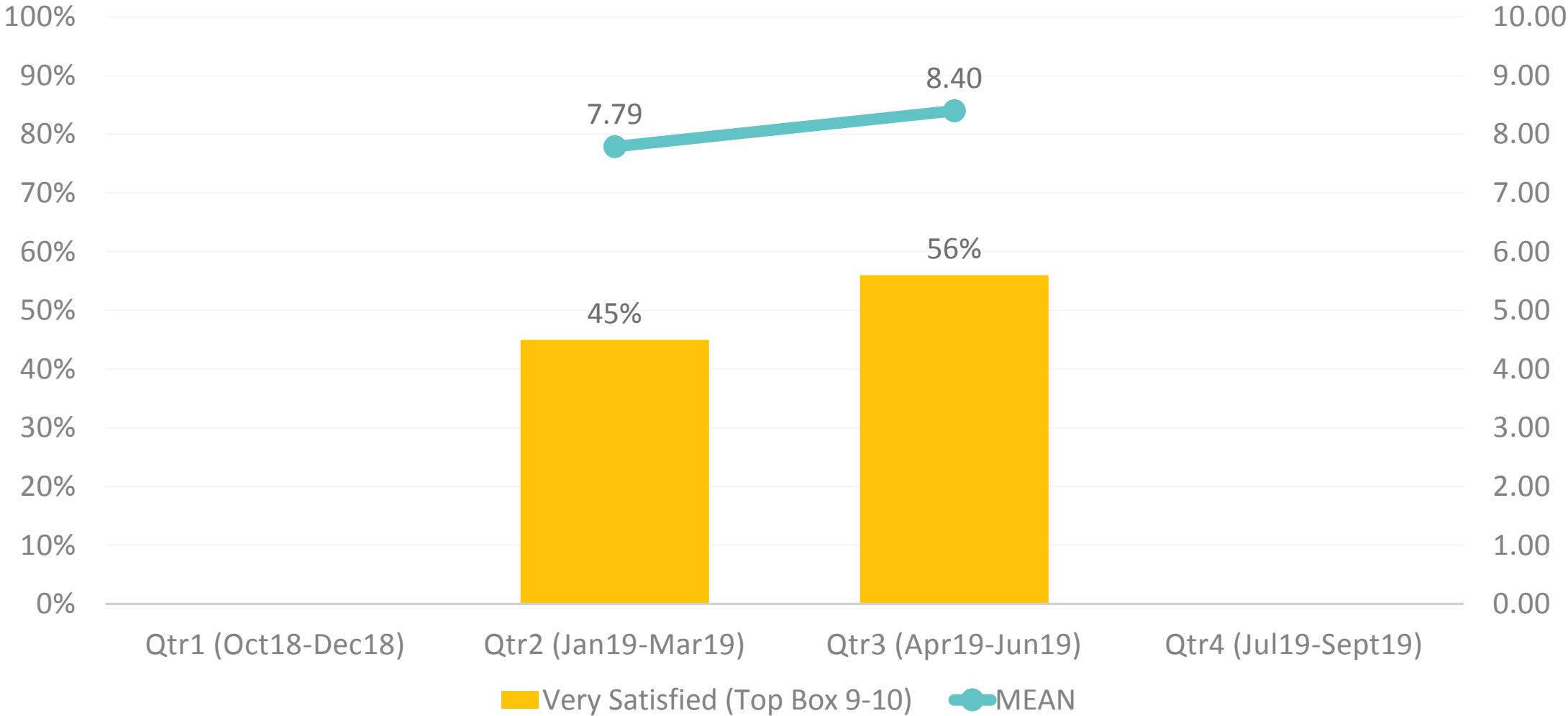
SATISFACTION – ROADS



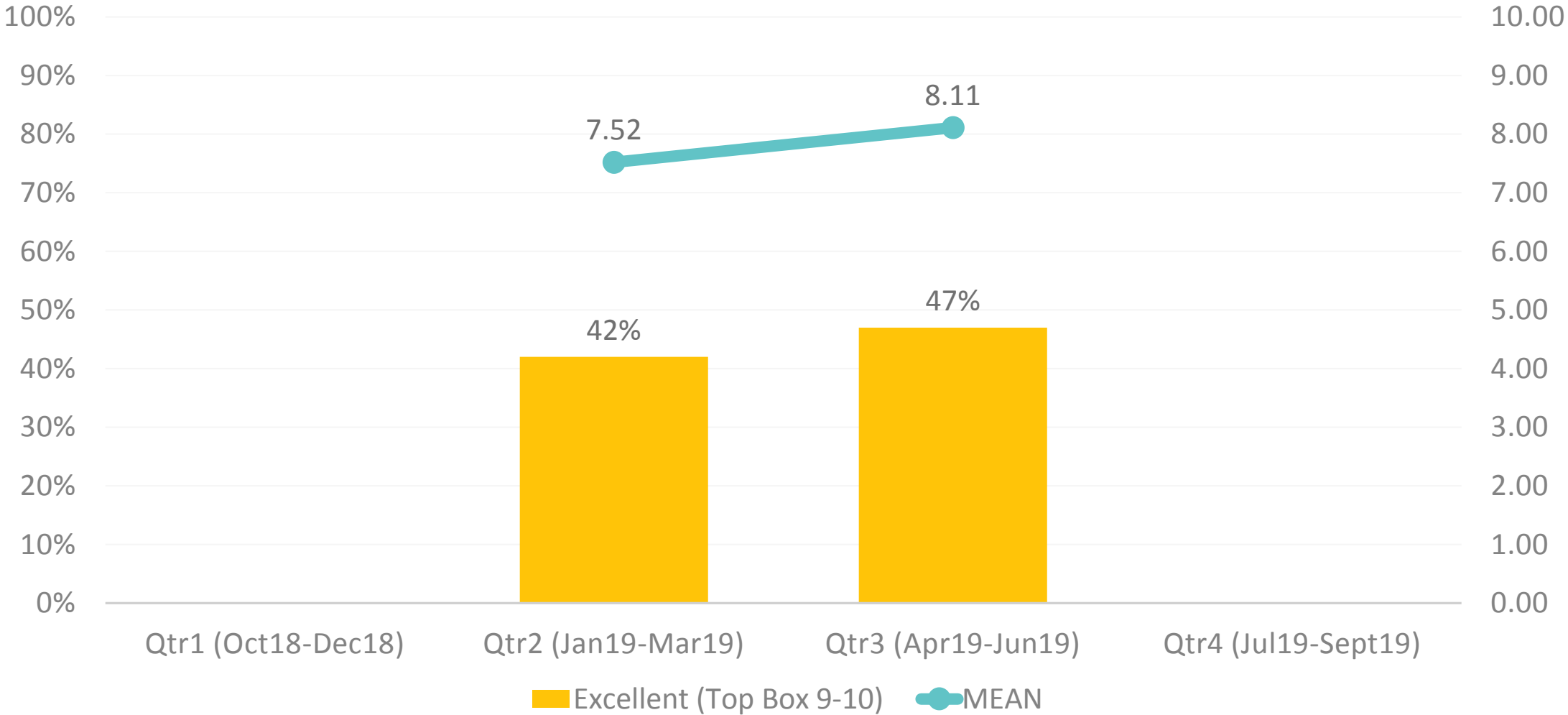
SATISFACTION – SIGHTSEEING AREAS



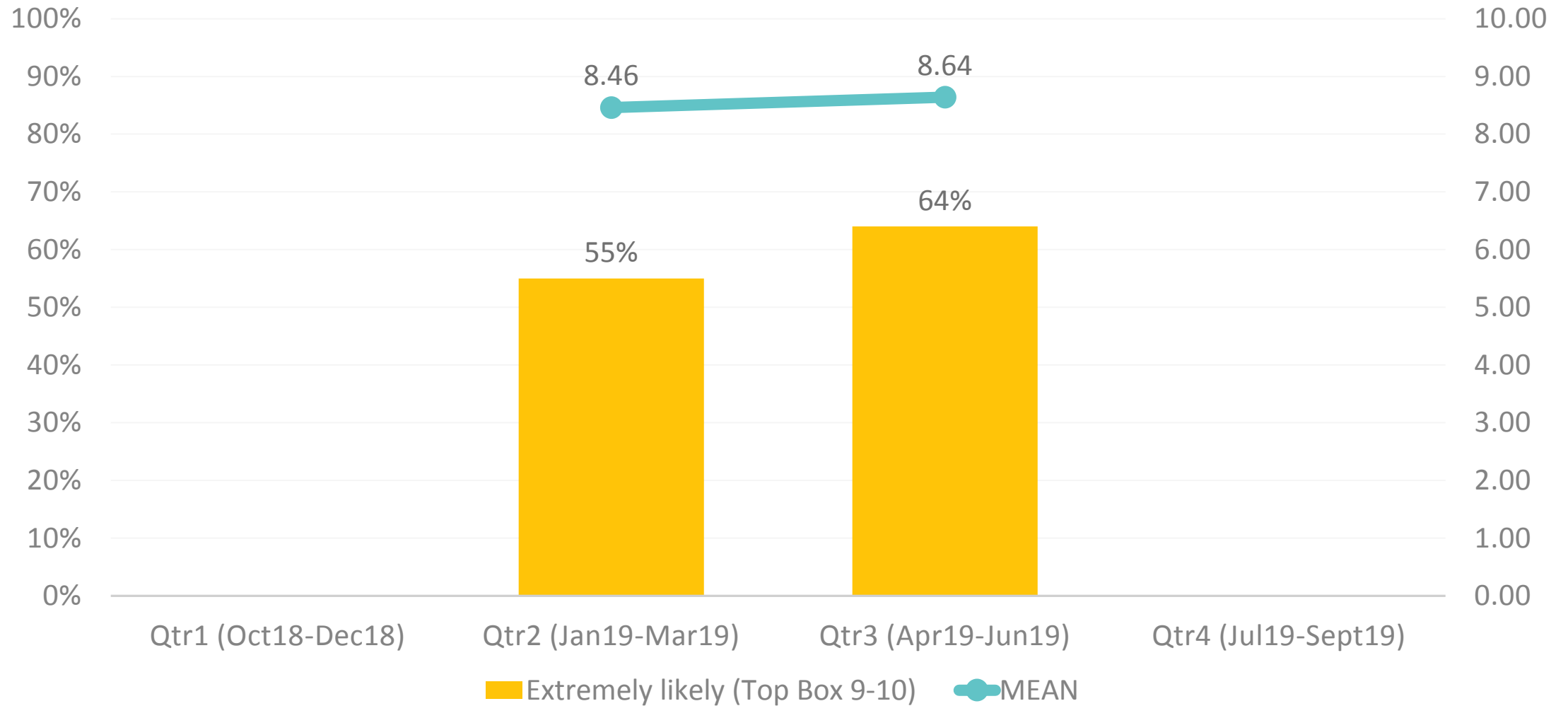
SATISFACTION – SAFETY & SECURITY



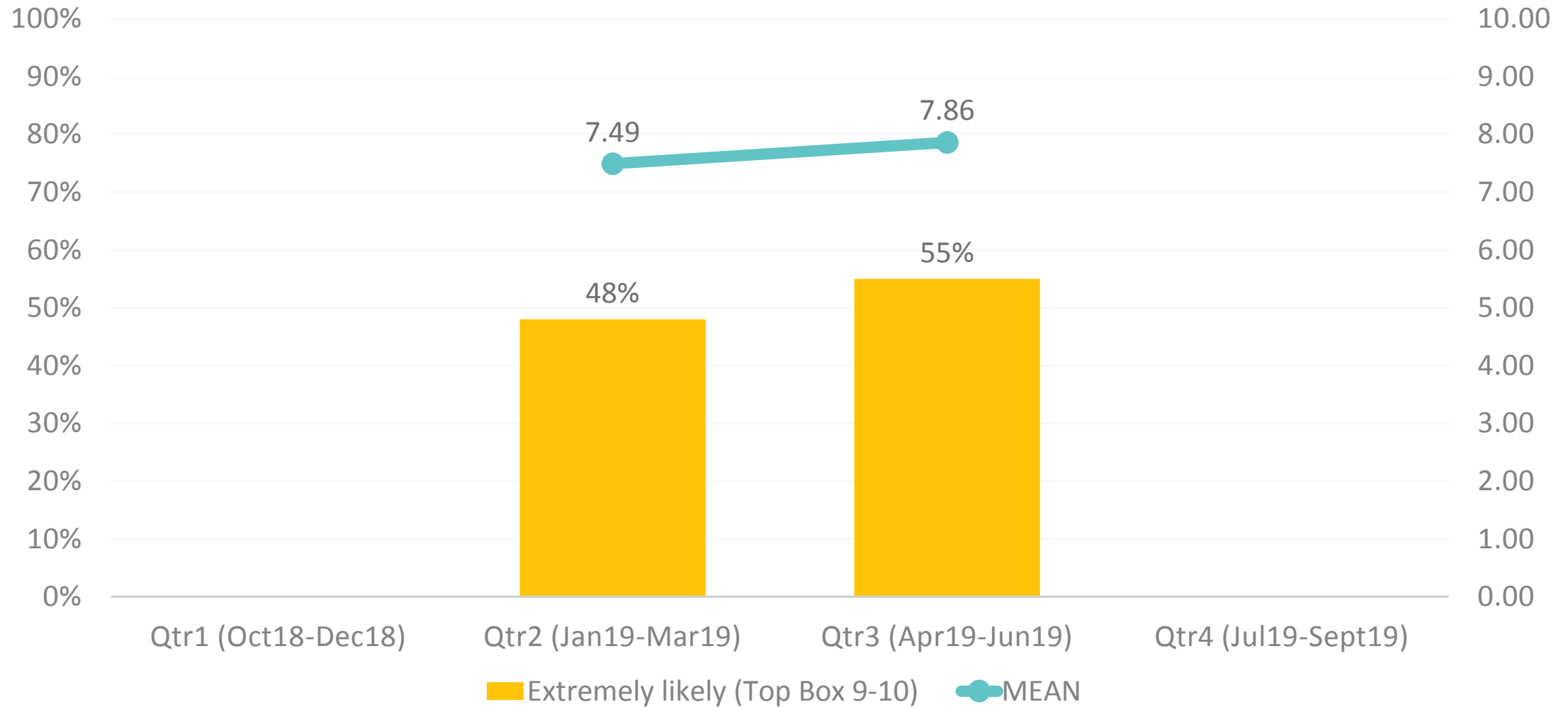
SATISFACTION – ACCOMMODATIONS



BRAND ADVOCACY

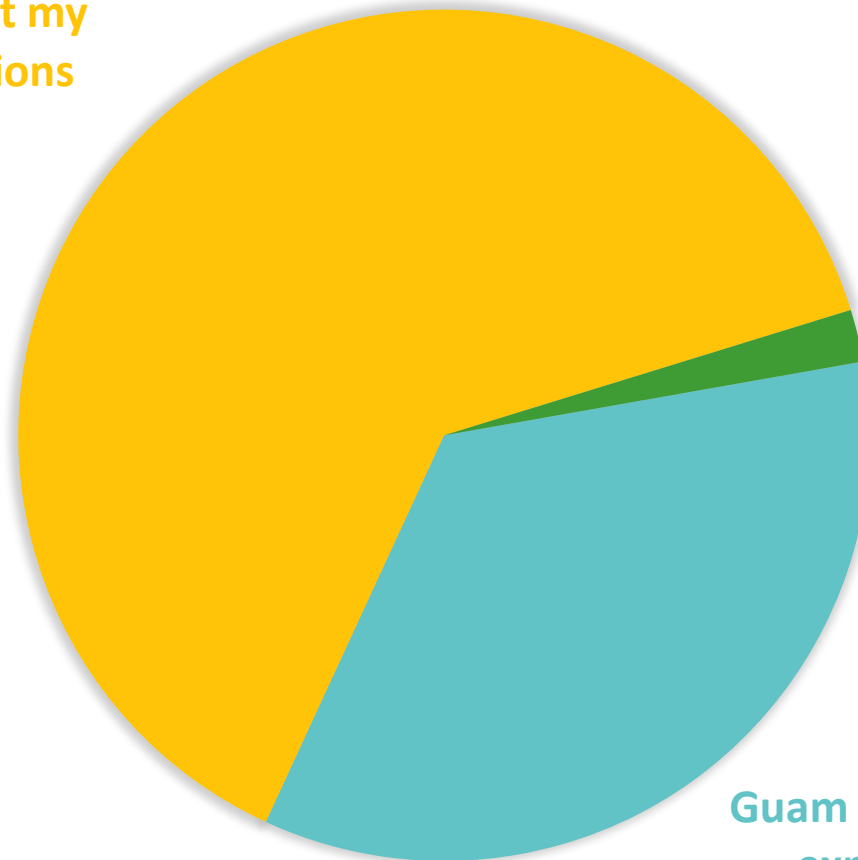


BRAND LOYALTY



TRIP EXPECTATIONS

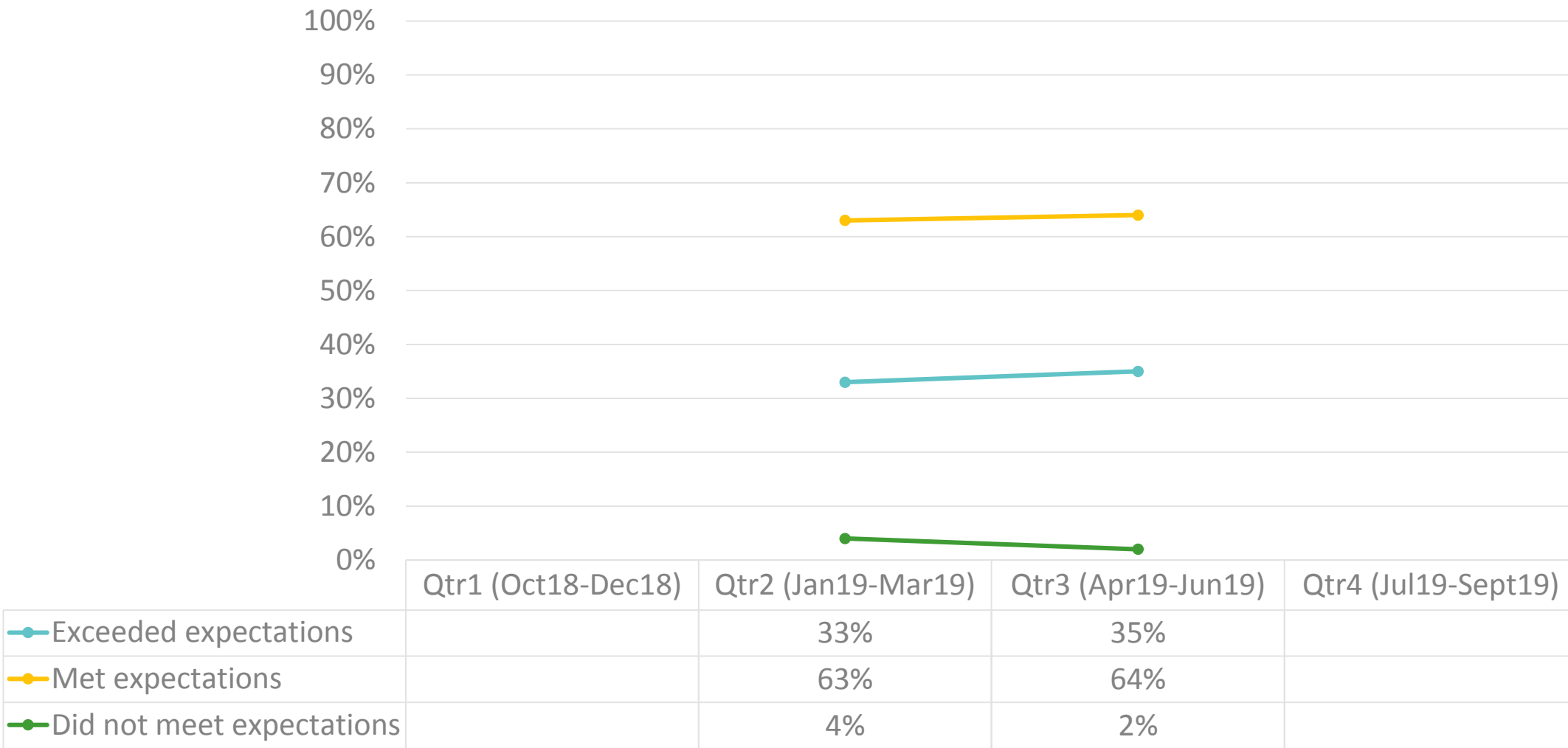
Guam met my
expectations
63%

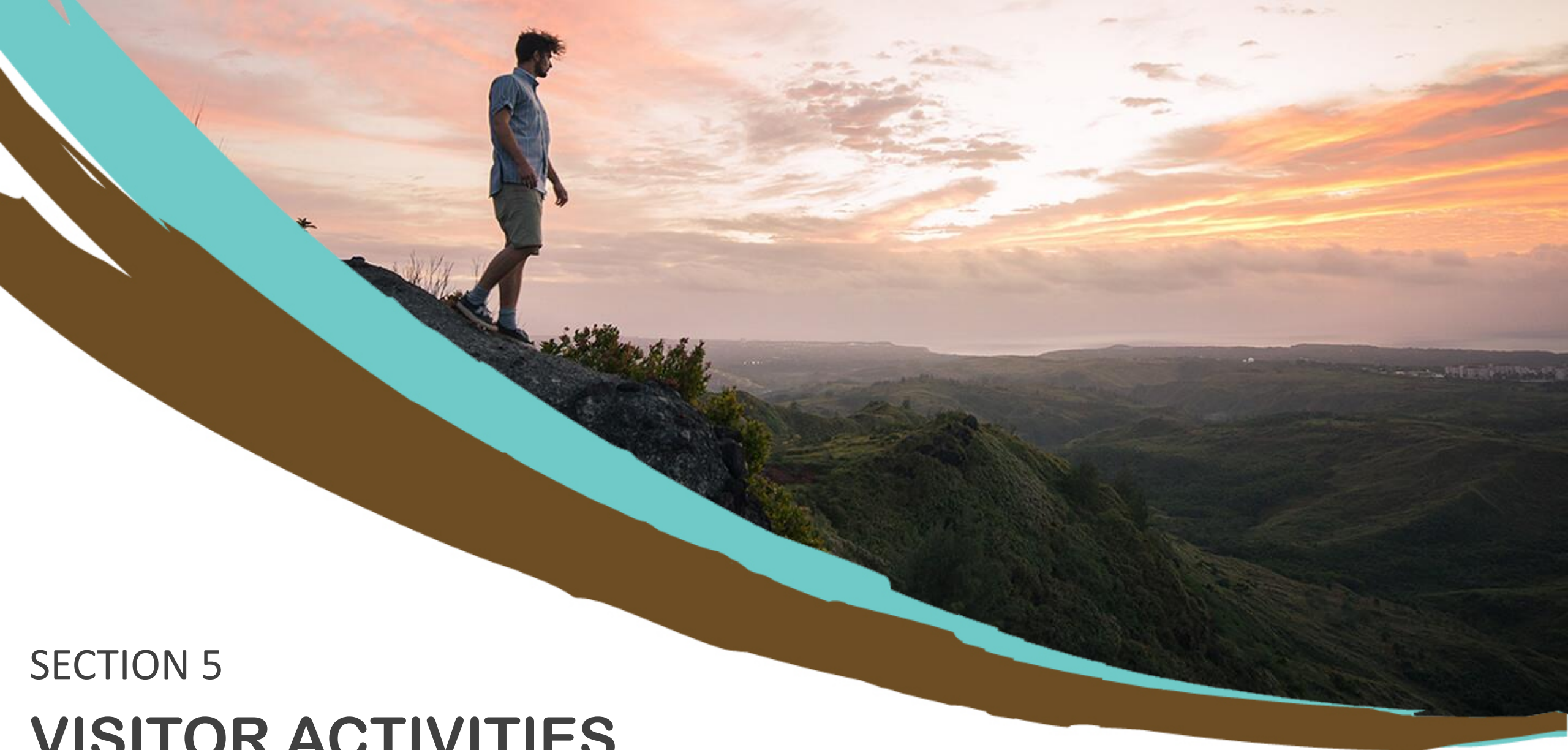


Guam did not meet
my expectations
2%

Guam exceeded my
expectations
35%

TRIP EXPECTATIONS – TRACKING



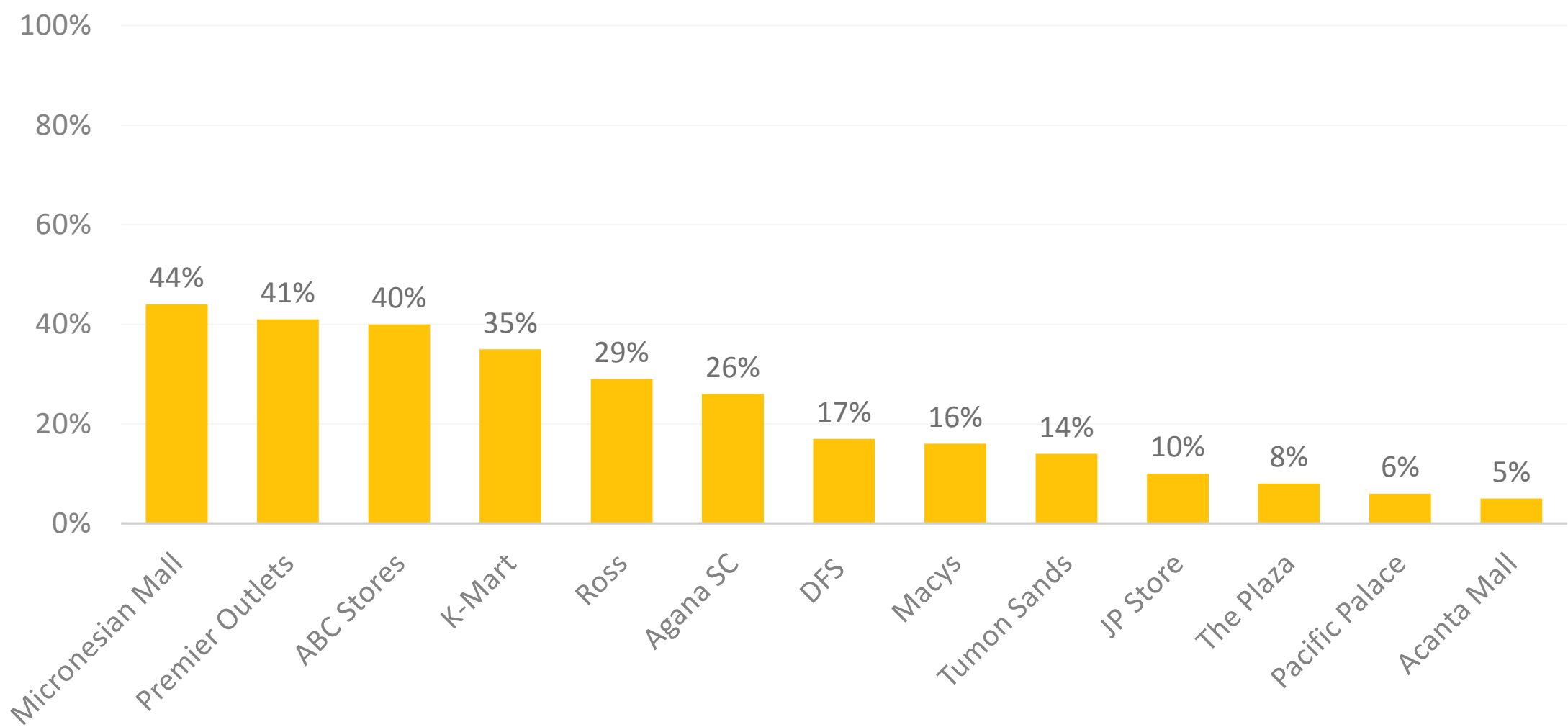


SECTION 5

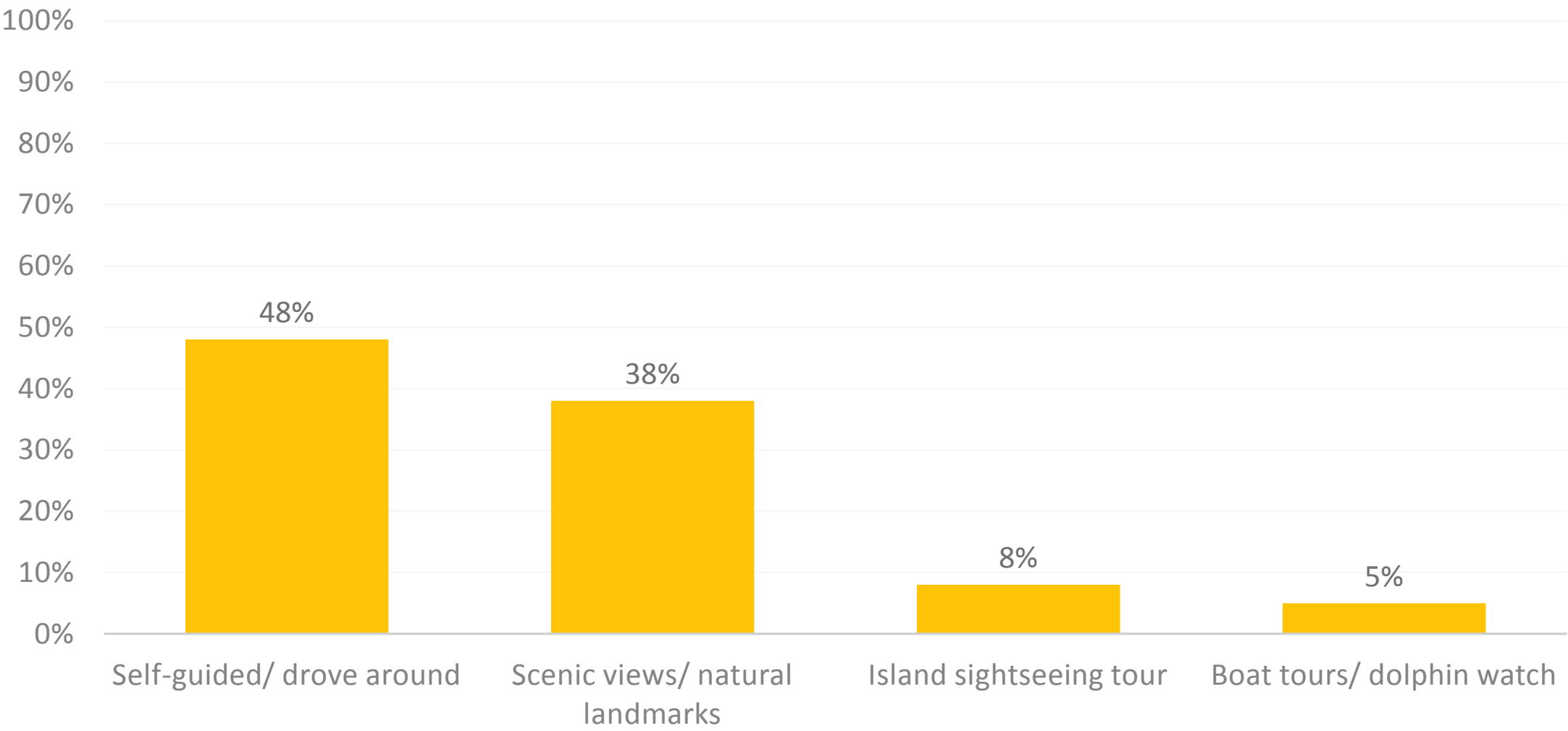
VISITOR ACTIVITIES



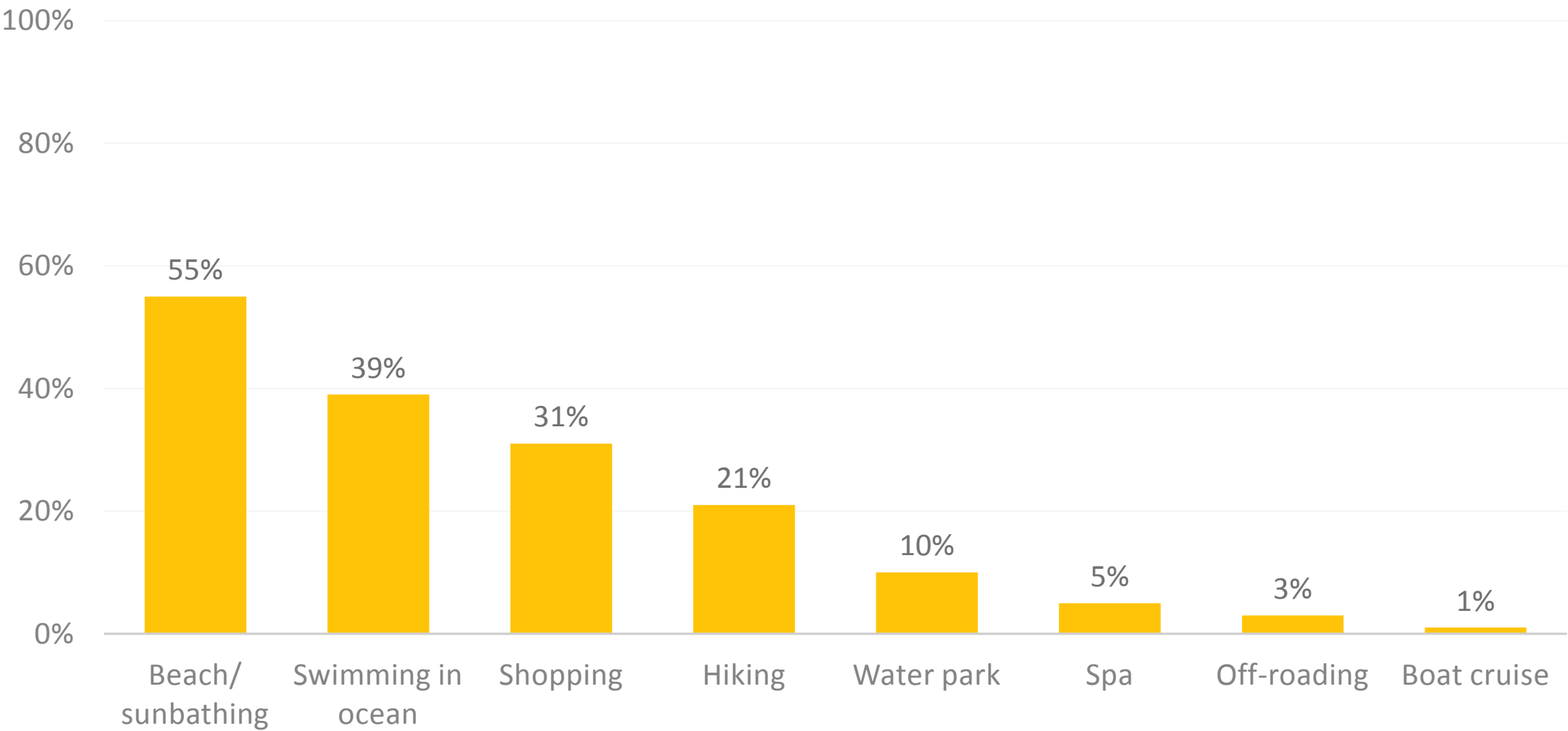
SHOPPING AREAS – PENETRATION



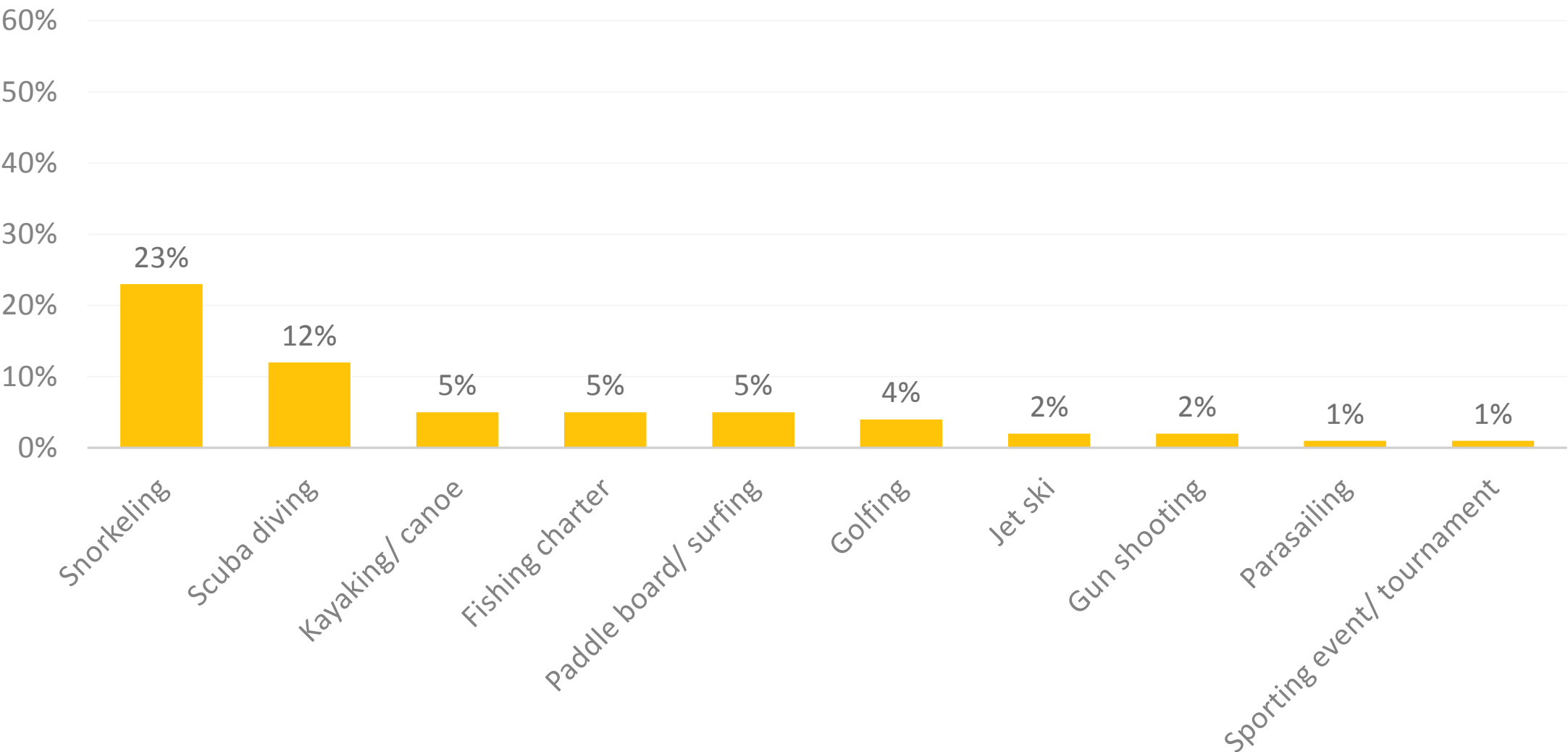
ACTIVITIES – SIGHTSEEING



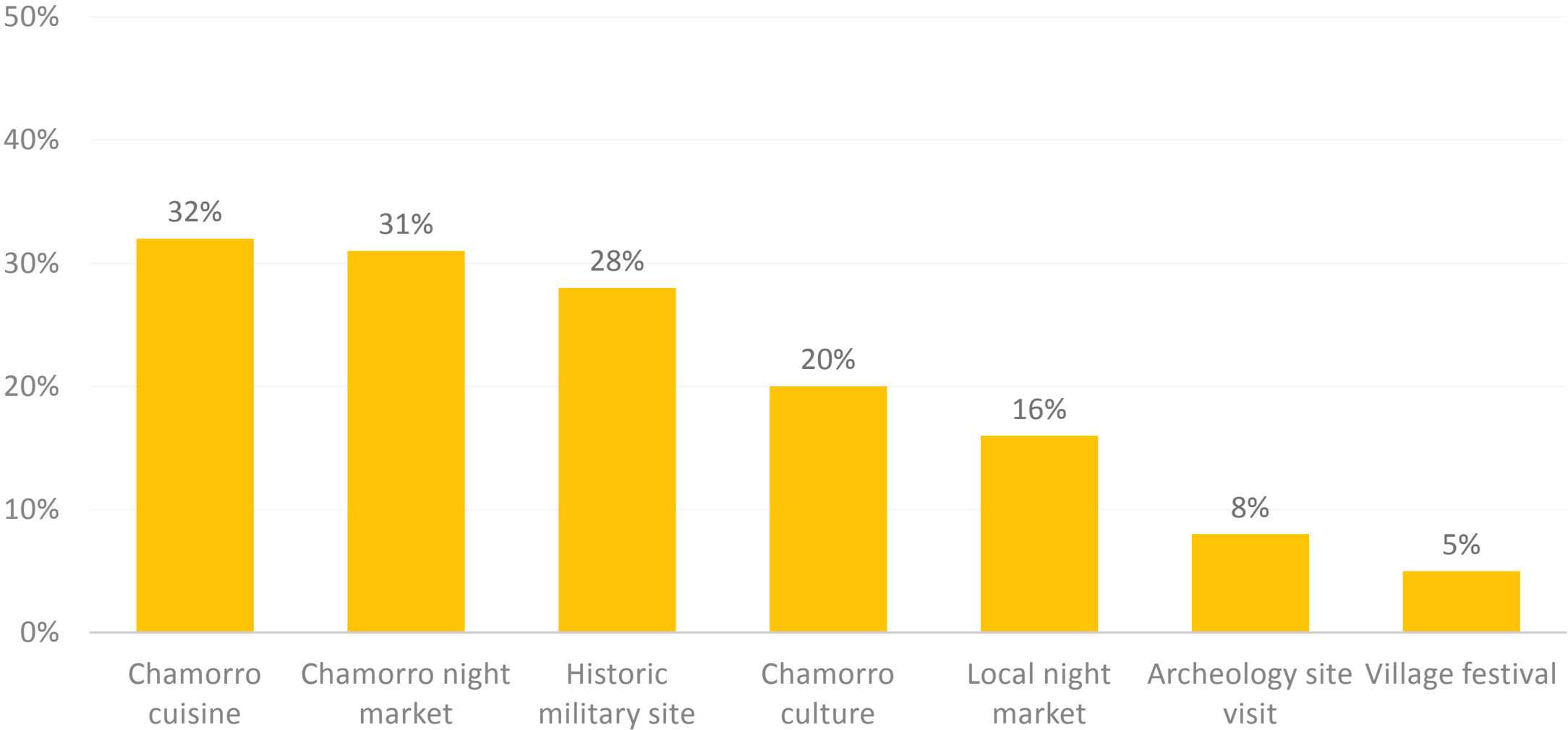
ACTIVITIES – RECREATION



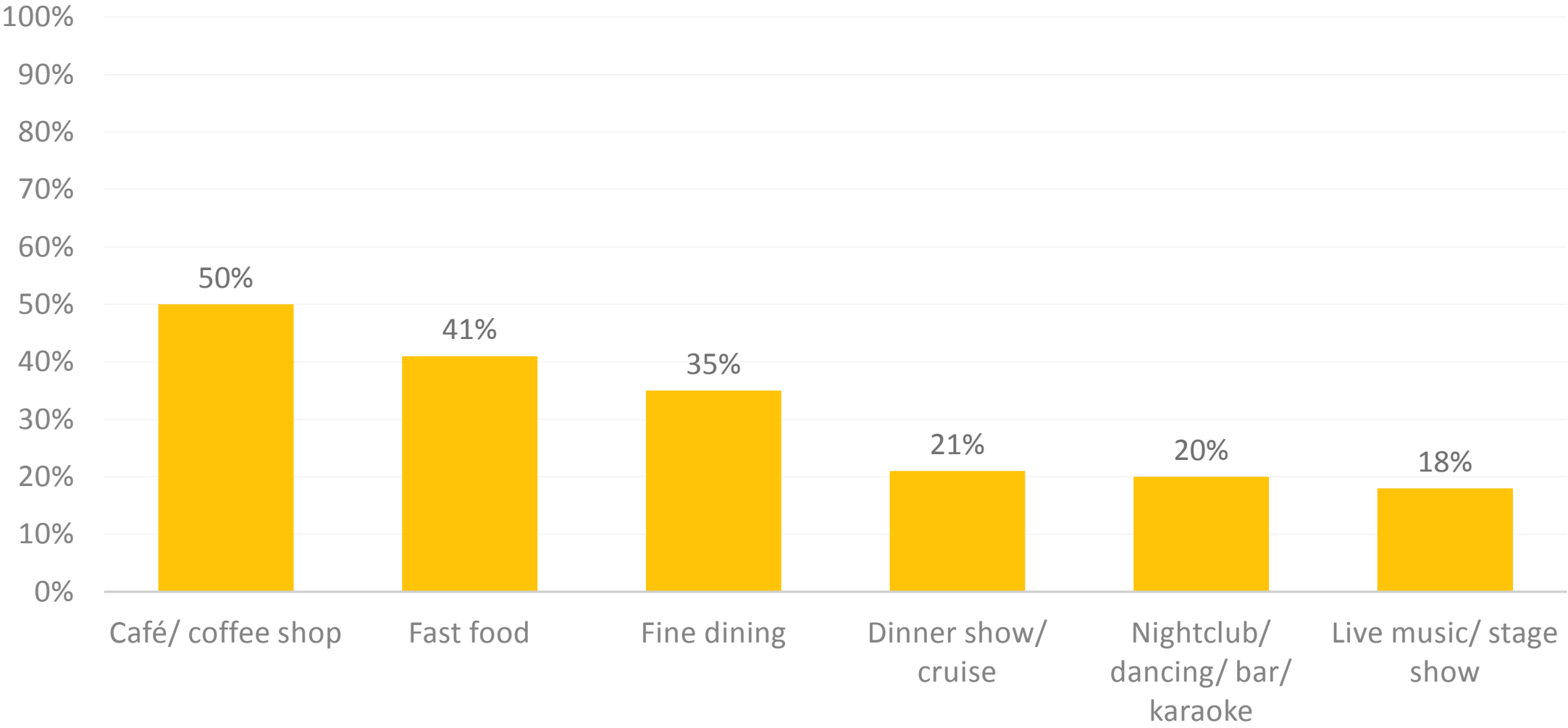
ACTIVITIES – SPORTS



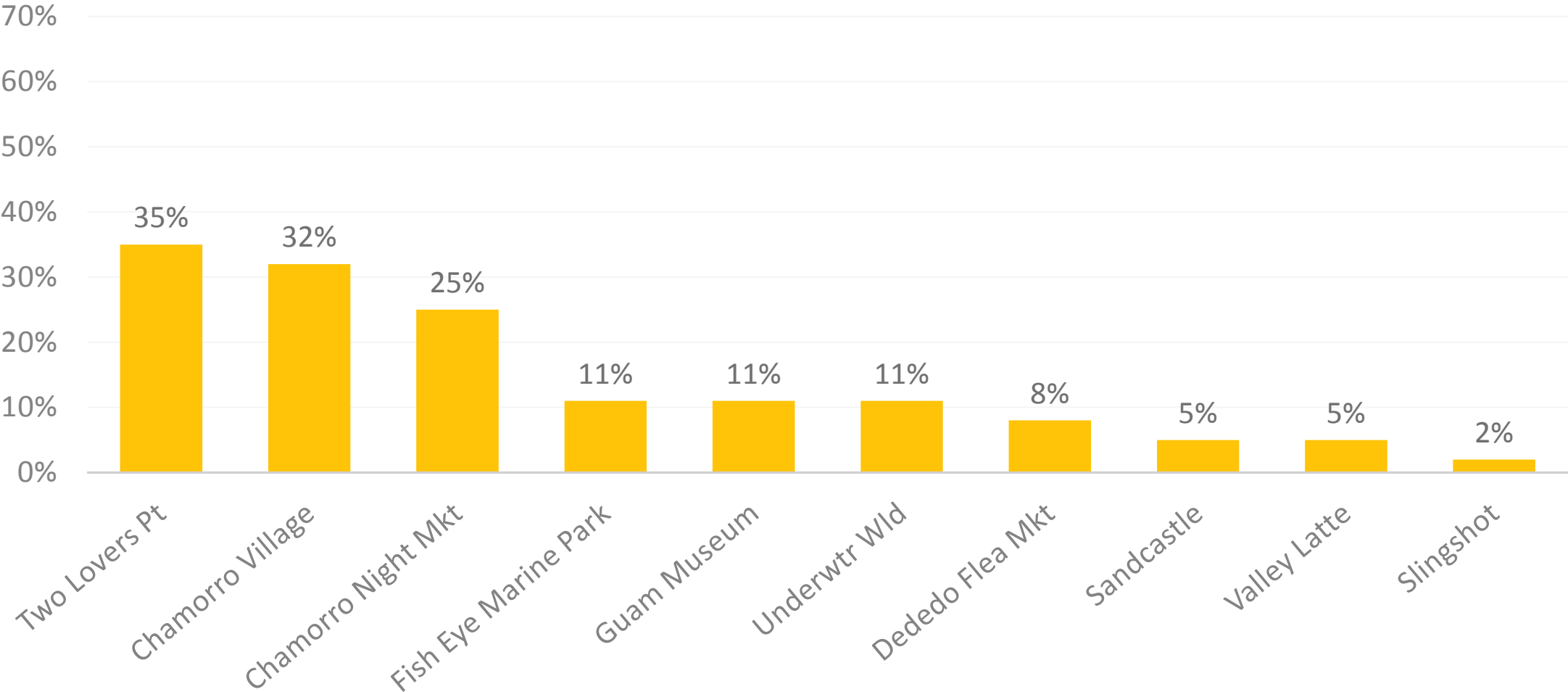
ACTIVITIES – HISTORY, CULTURE, ARTS



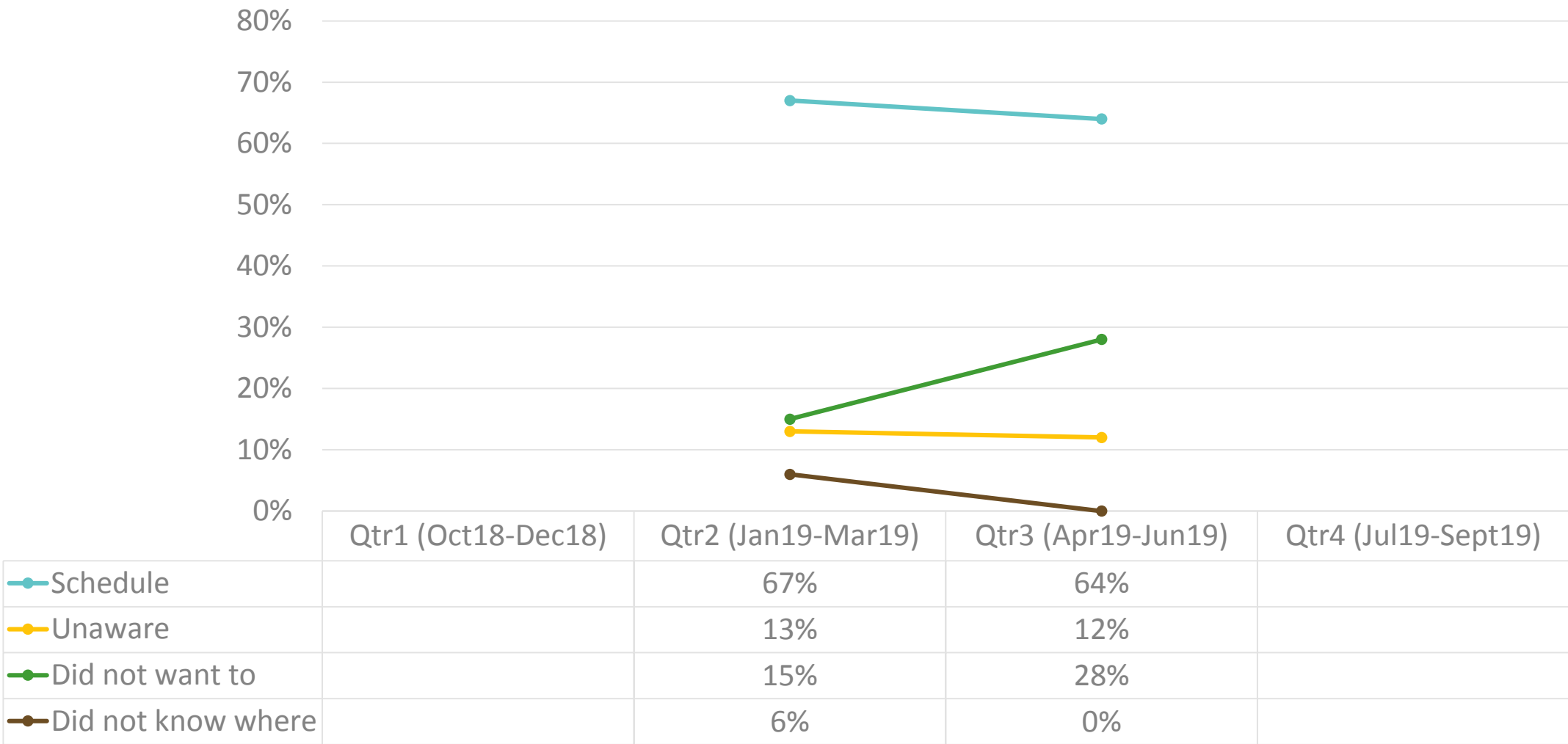
ACTIVITIES – ENTERTAINMENT & DINING



LOCAL ATTRACTIONS – TOP RESPONSES (5%+)



LOCAL CULTURE – OBSTACLES

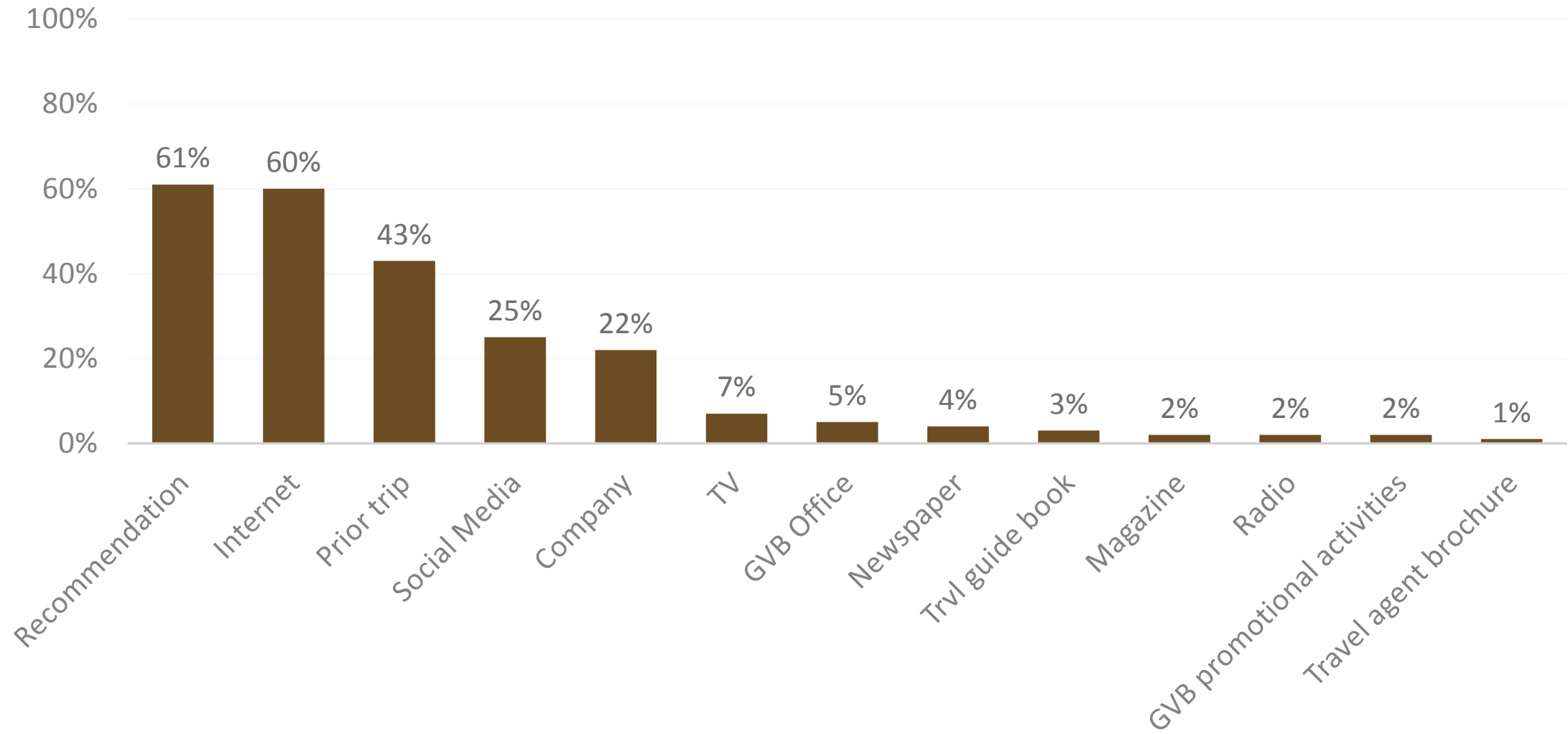




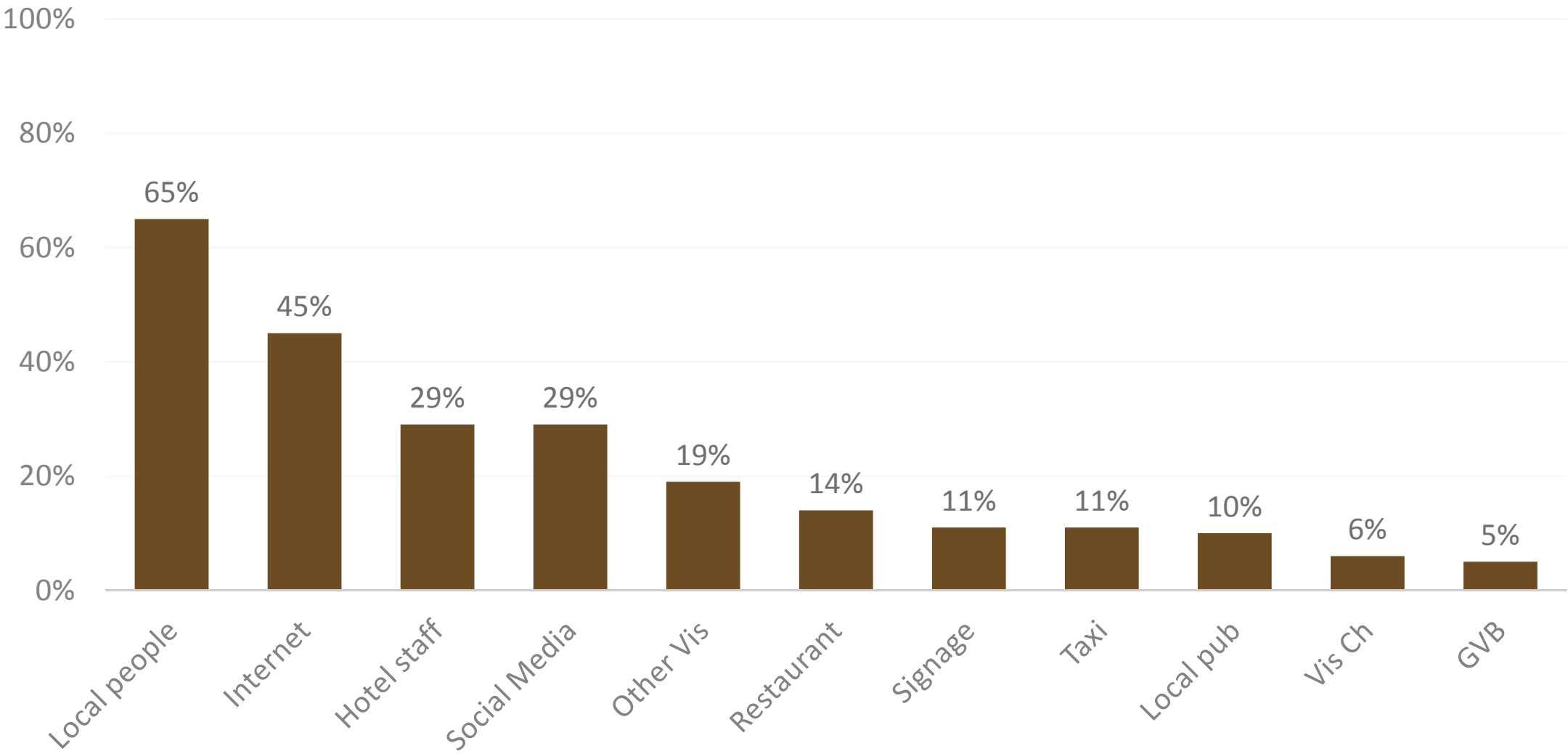
SECTION 6

SOURCES OF INFORMATION

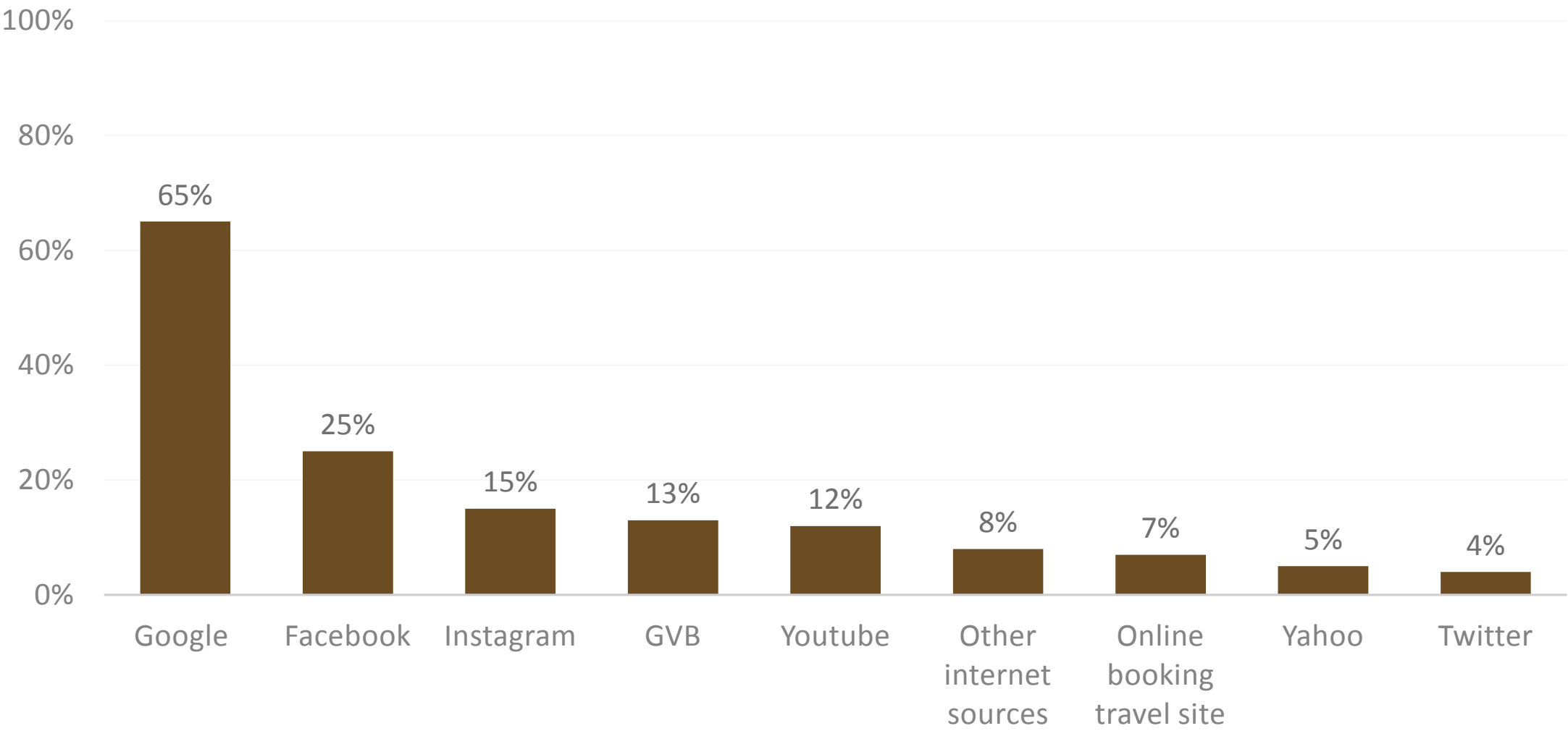
PRE-ARRIVAL SOURCES OF INFORMATION



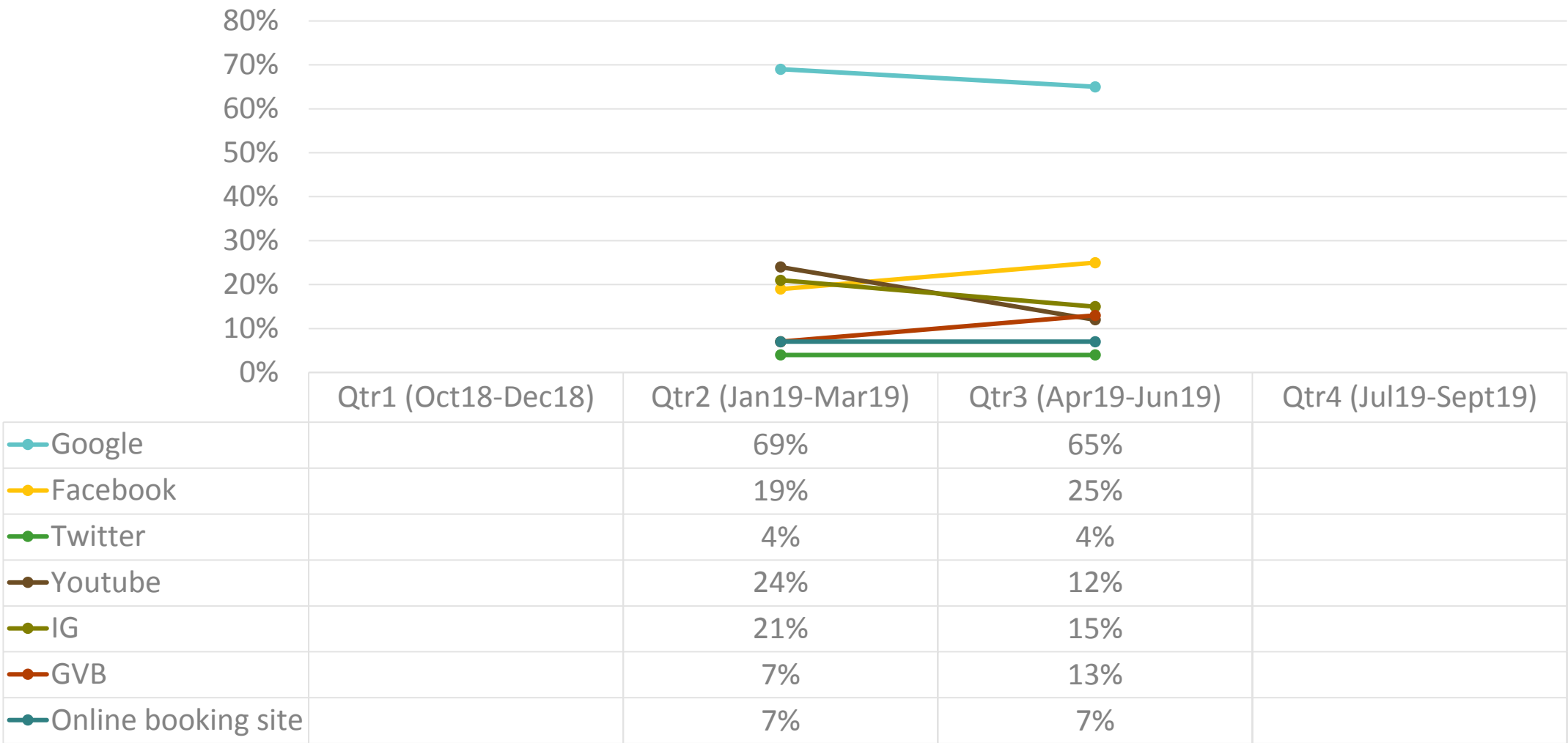
ONISLE SOURCES OF INFORMATION



ONLINE SOURCES OF INFORMATION



ONLINE SOURCES OF INFORMATION



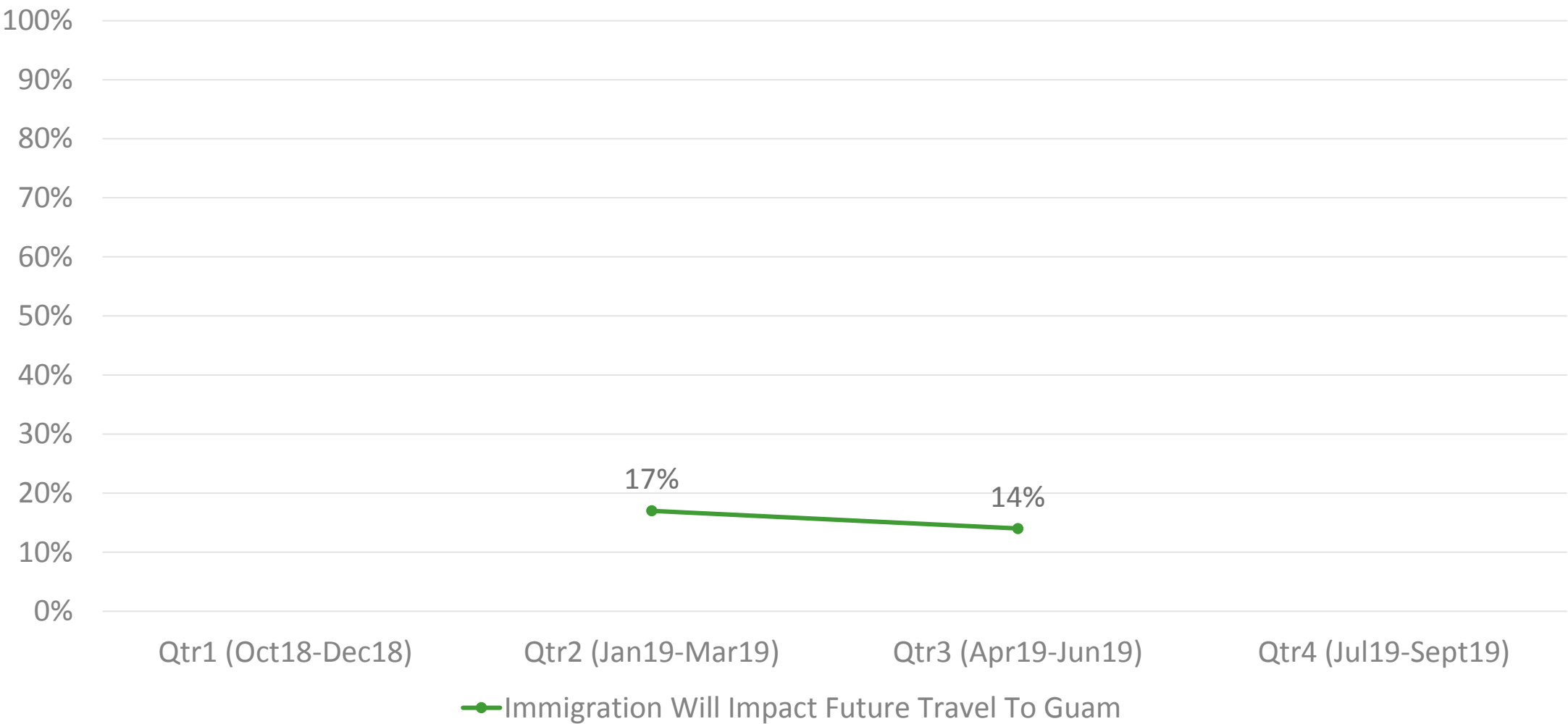


SECTION 7

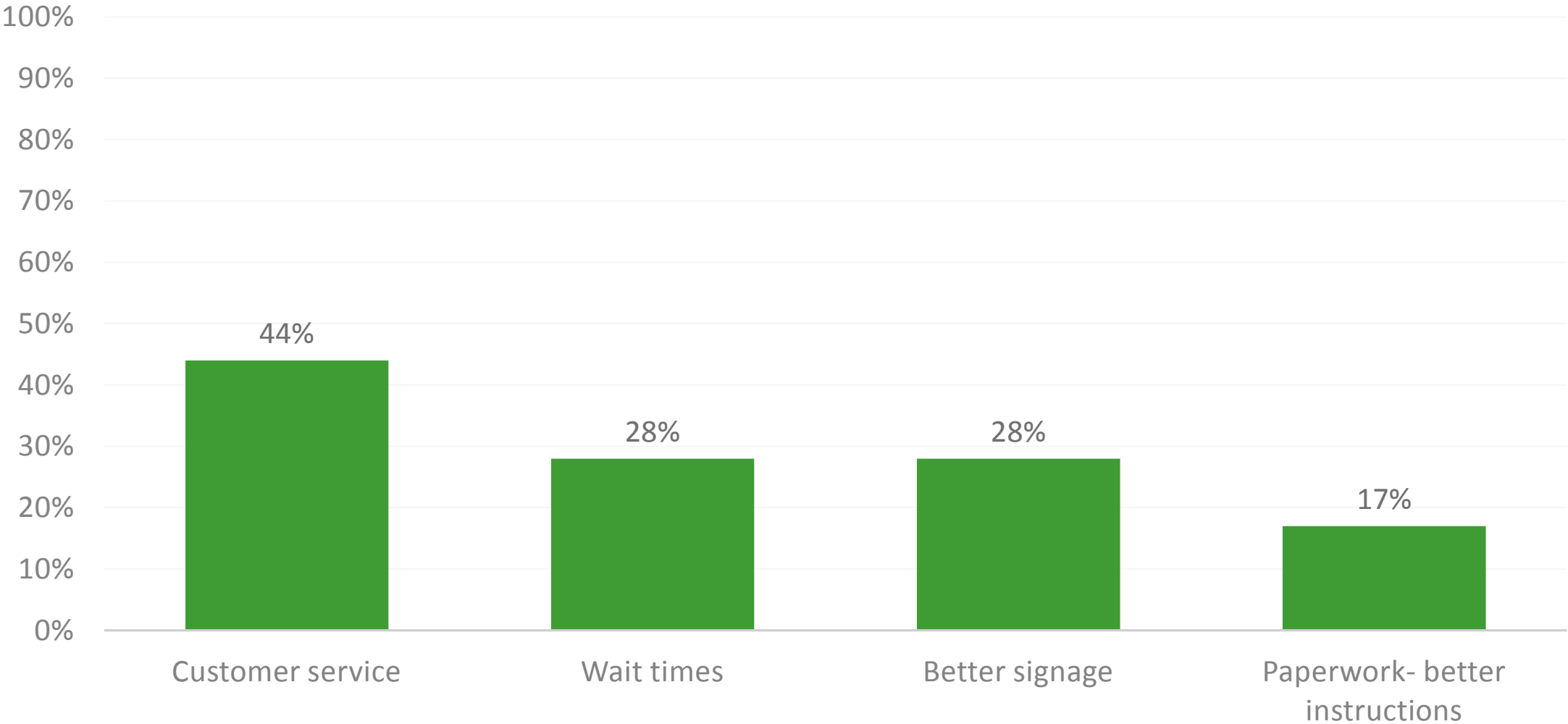
IMMIGRATION



IMPACT OF AIRPORT IMMIGRATION SVC ON FUTURE TRAVEL TO GUAM



AIRPORT – SECURITY/ IMMIGRATION ISSUES





SECTION 8

ADVANCED STATS



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 ($p \leq .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.
- The predictor variables (drivers) are ranked on the percentage they account for the dependent variable. The top two ranked independent variables generally account for the largest percentages of the dependent variable and are thus the best predictors (drivers) of the dependent variable.

DRIVERS – OVERALL SATISFACTION

Comparison of Drivers of Overall Satisfaction, 2nd, 3rd Qtr. 2019, New Survey

	2nd Qtr 2019	3rd Qtr. 2019	Combined 2-3rd Qtr. 2019
Drivers:	rank	rank	rank
Entertainment	1	1	1
Shopping			
Dining		3	
Beaches			
Parks			
Roads	2		
Sightseeing Areas			
Being a safe and secure destination		1	2
% of Overall Satisfaction Accounted For:	42.5%	46.5%	39.7%

NOTE: Only significant drivers are included.

DRIVERS – OVERALL SATISFACTION

- **Overall satisfaction** with the U.S. visitor's experience on Guam is driven by three significant factors in the 3rd Quarter 2019 Period. By rank order they are:
 - **Entertainment,**
 - **Being a safe & secure destination, and**
 - **Dining.**
- With these factors the overall r^2 is .465 meaning that **46.5% of overall satisfaction is accounted for by these factors.**

DRIVERS – ONISLE EXPENDITURES

Comparison of Drivers of Per Person On Island Expenditures, 2-3rd Qtr. 2019, New Survey			
	2nd Qtr 2019	3rd Qtr. 2019	Combined 2-3rd Qtr. 2019
Drivers:	rank	rank	rank
Entertainment			
Shopping			
Dining			
Beaches			
Parks			
Roads			
Sightseeing Areas			
Being a safe and secure destination			
% of Overall Satisfaction Accounted For:	0.0%	0.0%	0.0%
NOTE: Only significant drivers are included.			

DRIVERS – ONISLE EXPENDITURES

- **Per Person On Island Expenditure** of U.S. visitors on Guam is driven by no significant factor in the 3rd Quarter 2019 Period.