



# *Guam Visitors Bureau*

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

FY2019 - QTR.4 (JUL-SEPT 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 174 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 174 is +/- 7.43 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 +/- 7.43 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.



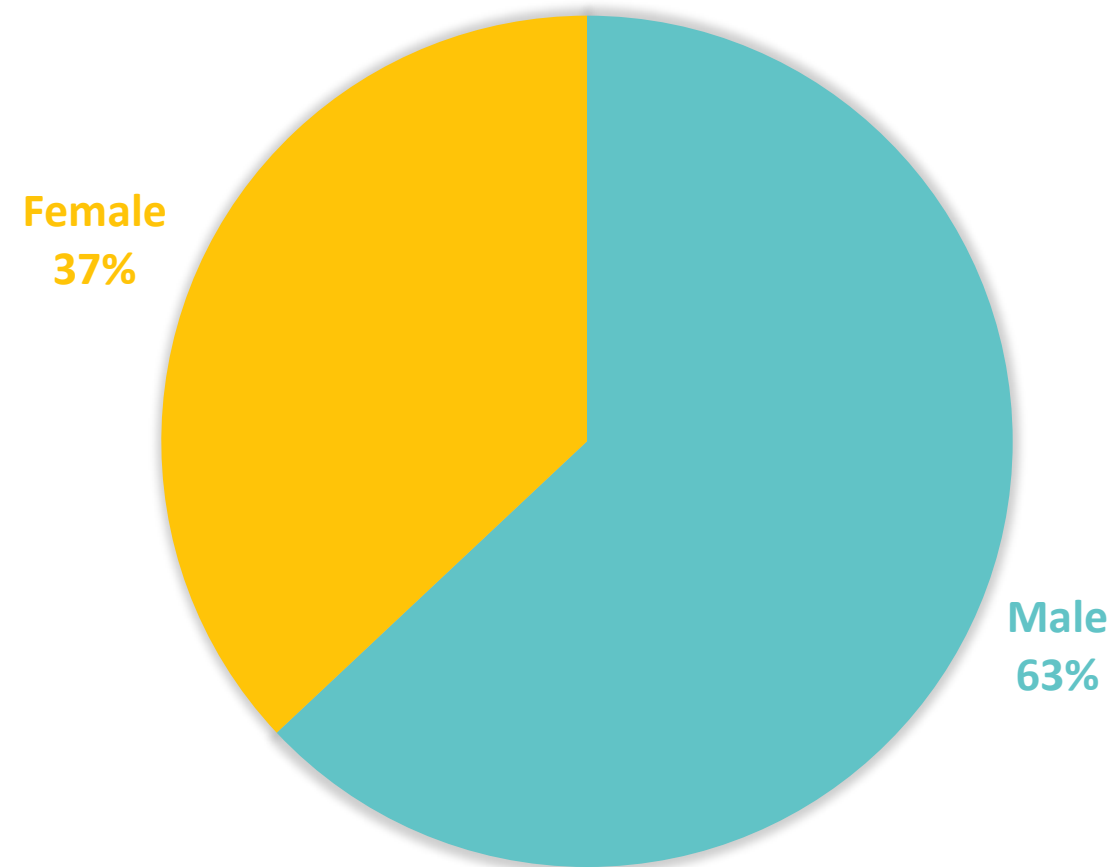


SECTION 1

# PROFILE OF RESPONDENTS



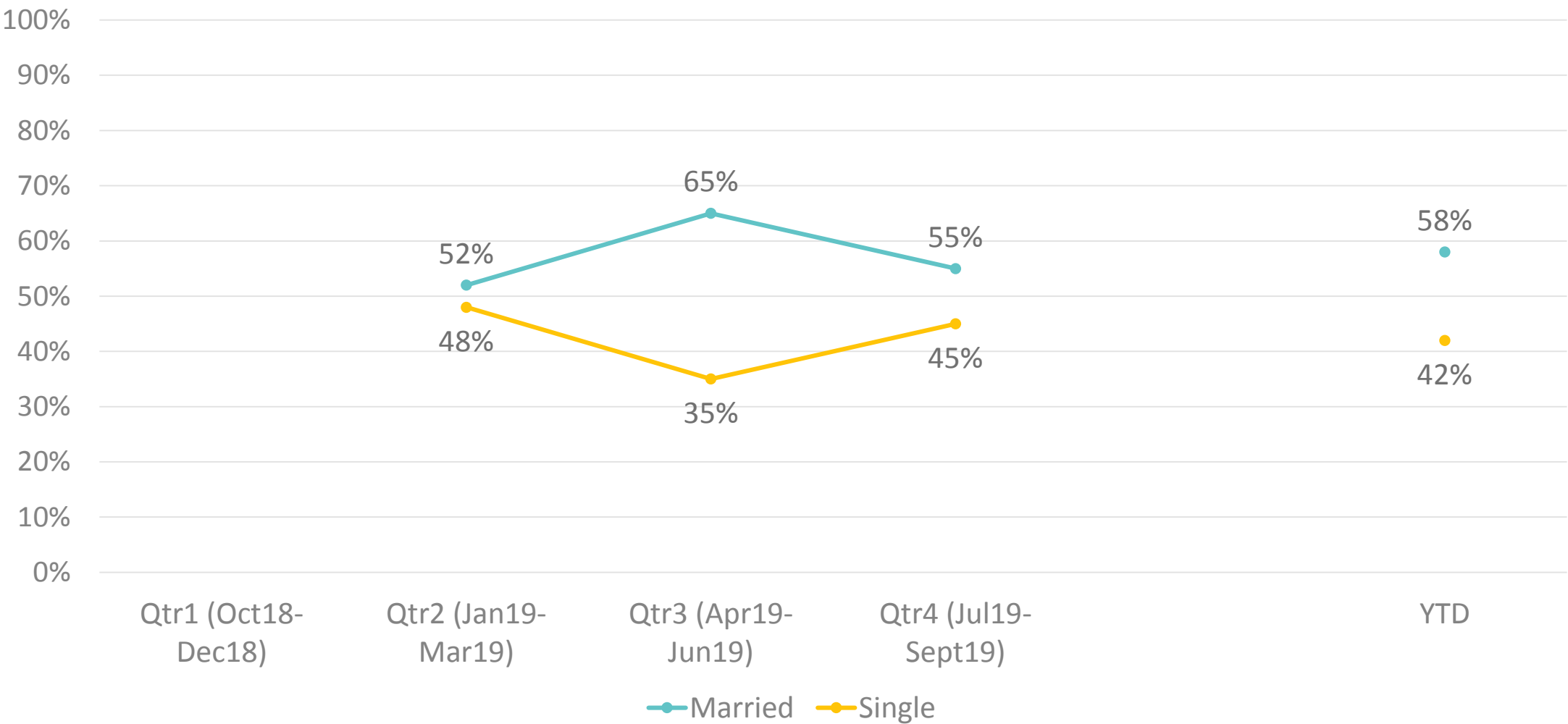
# GENDER



# MARITAL STATUS

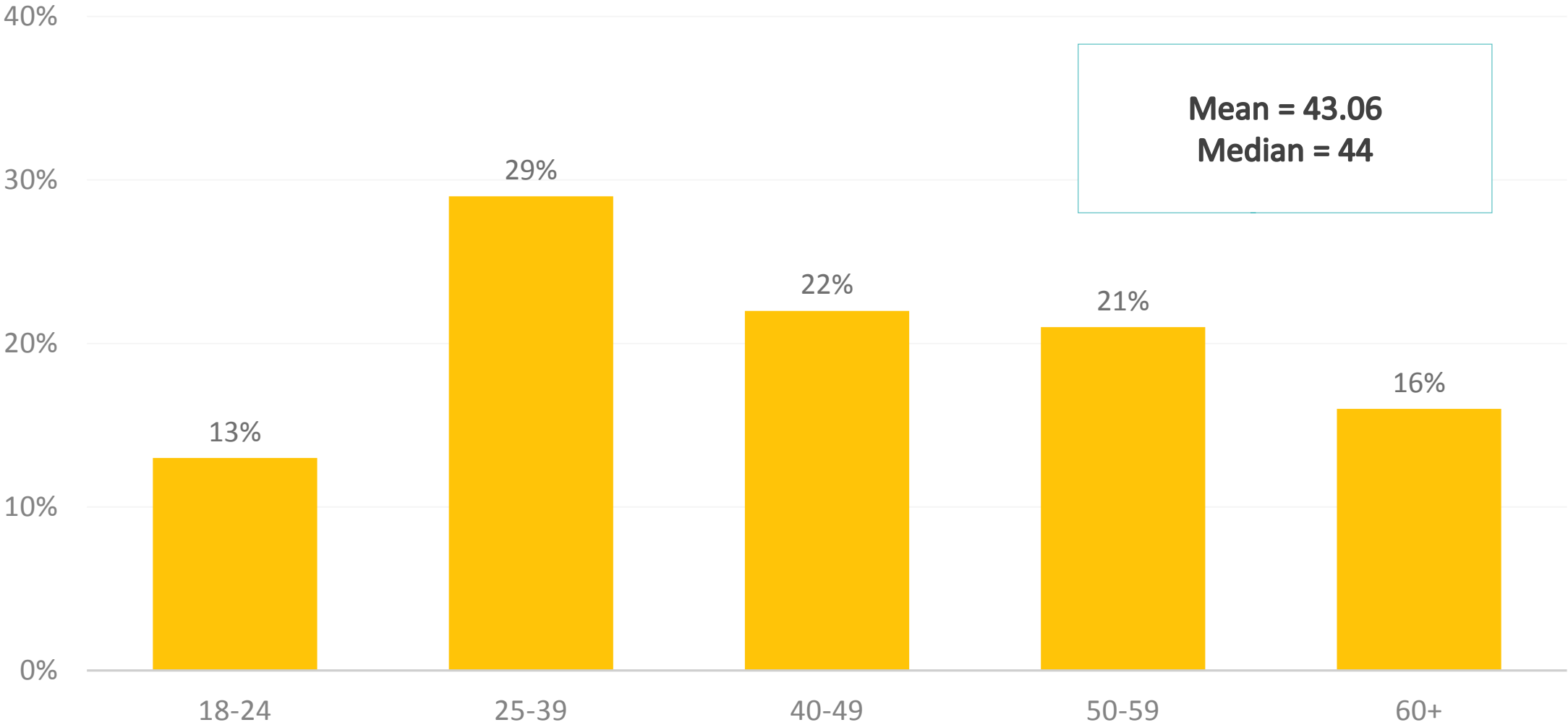


# MARITAL STATUS – TRACKING

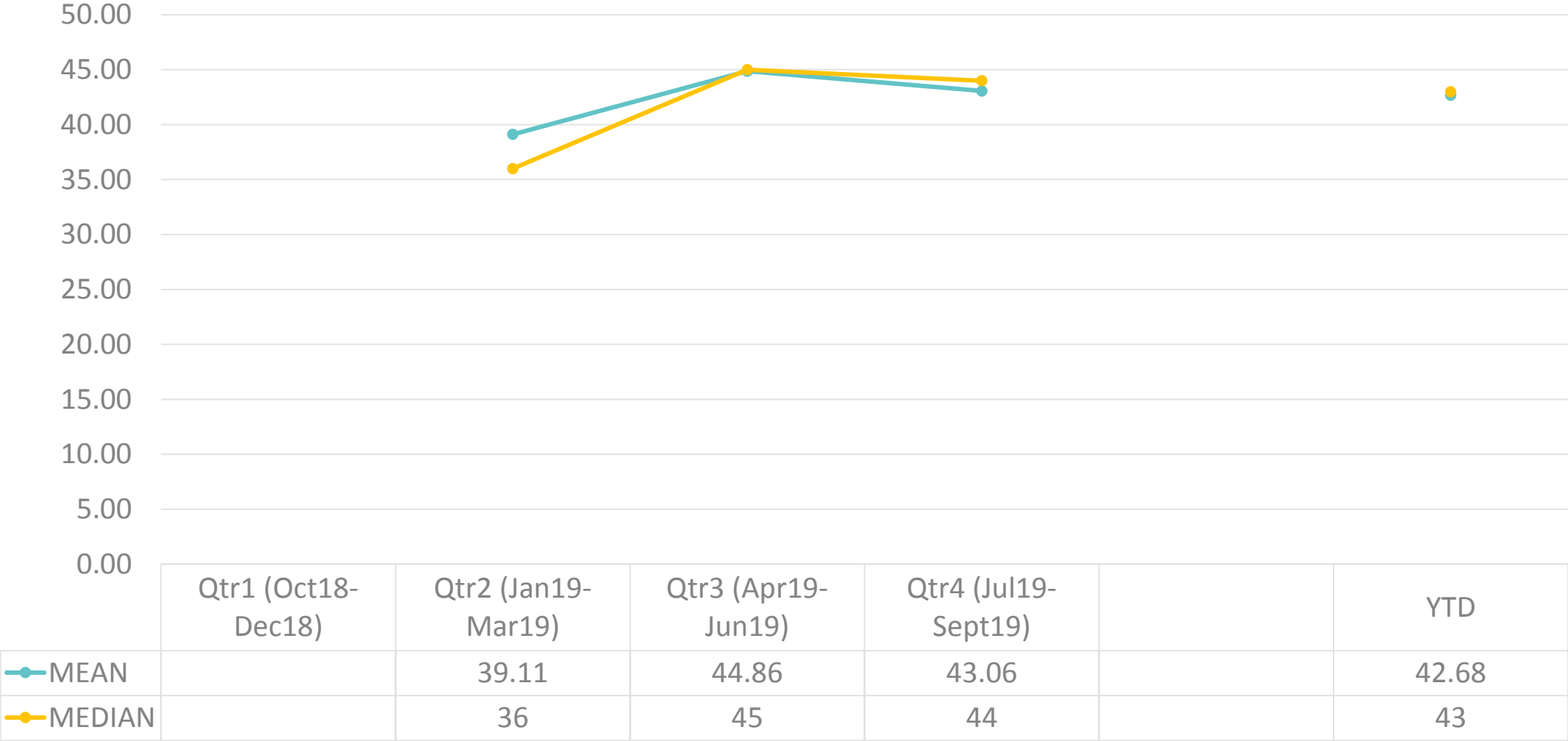




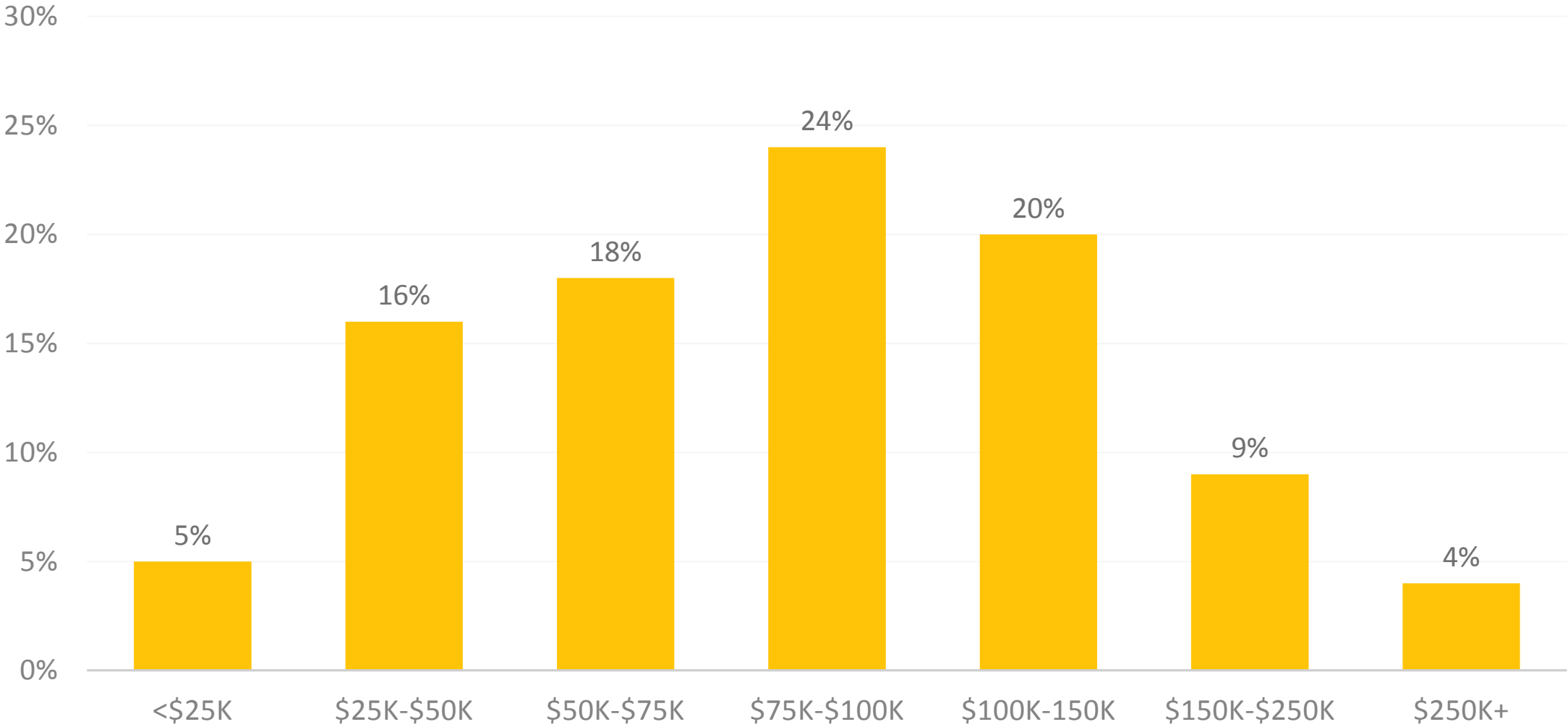
# AGE



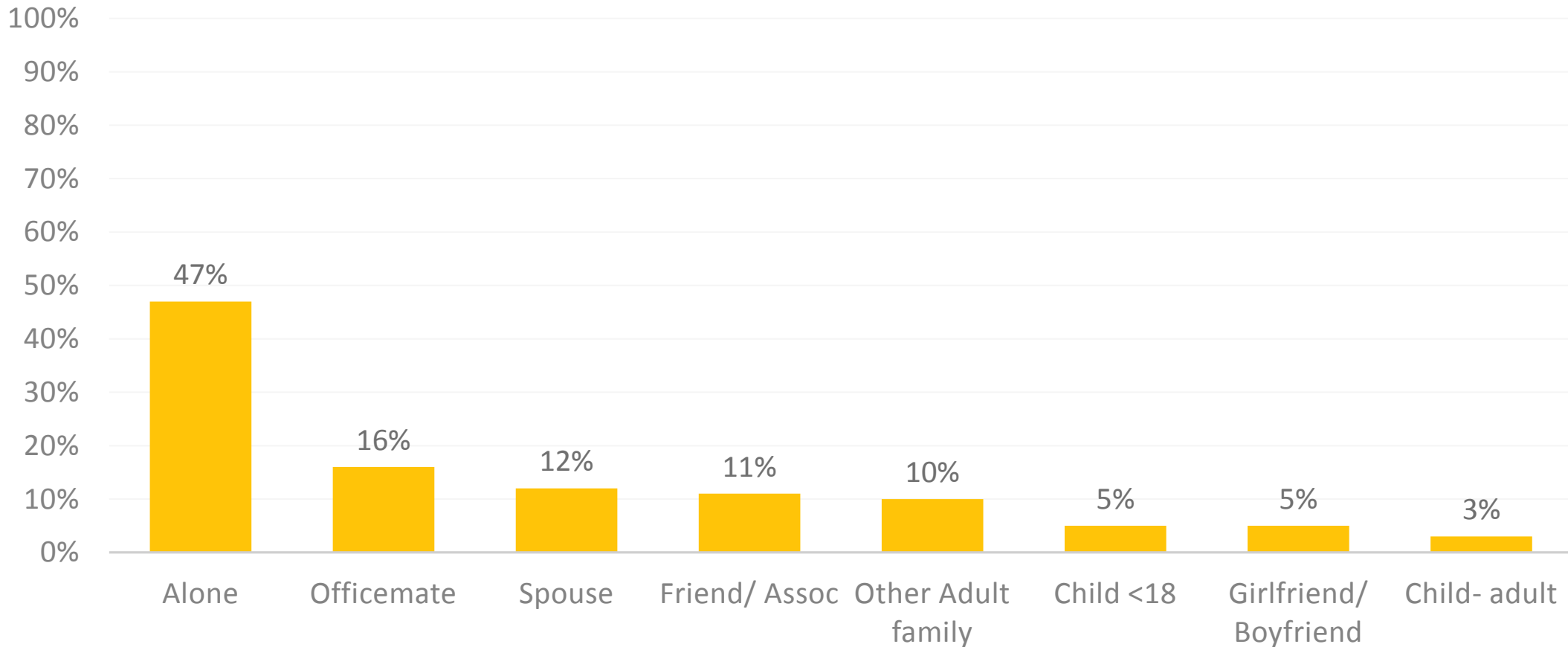
# AGE – TRACKING



# HOUSEHOLD INCOME

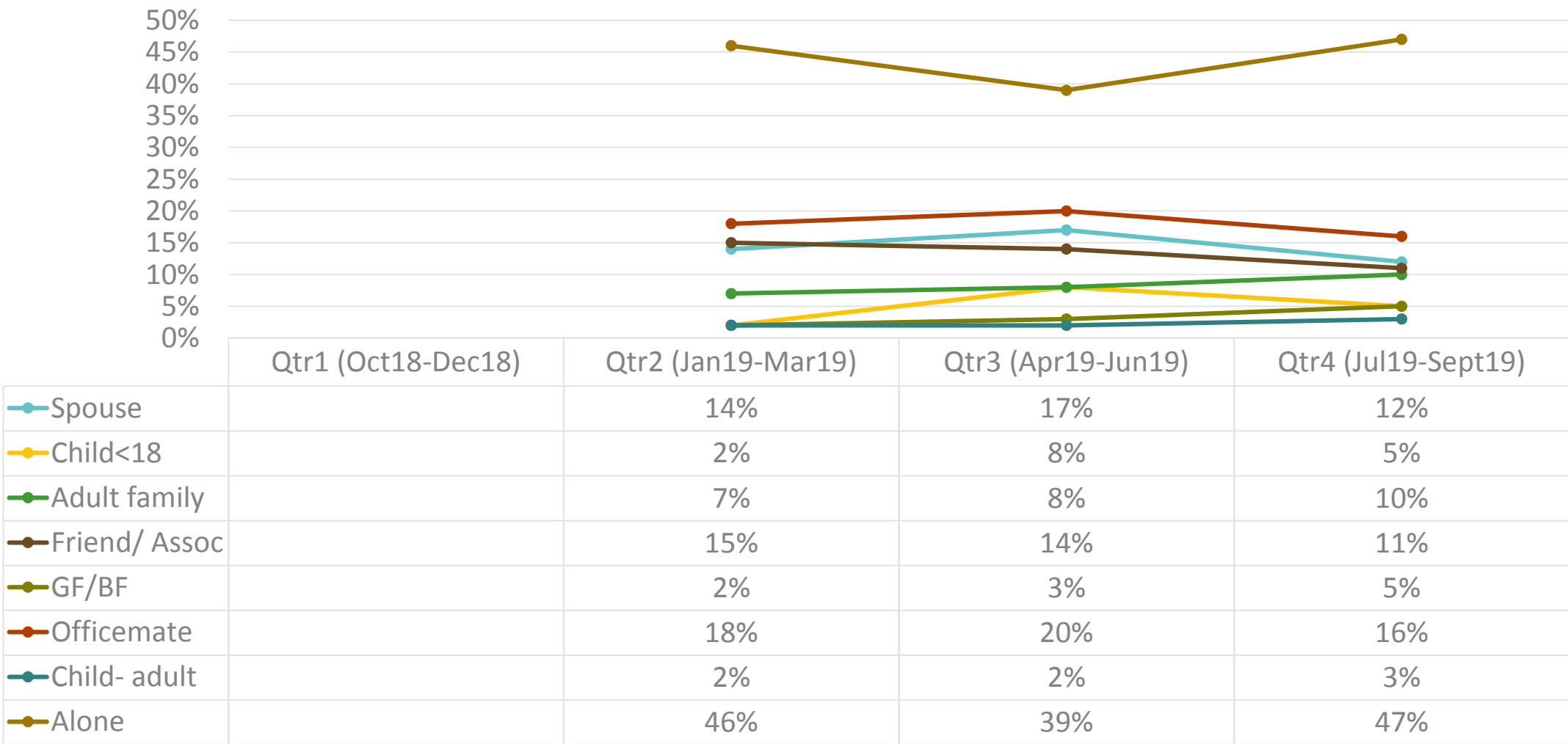


# TRAVEL PARTY

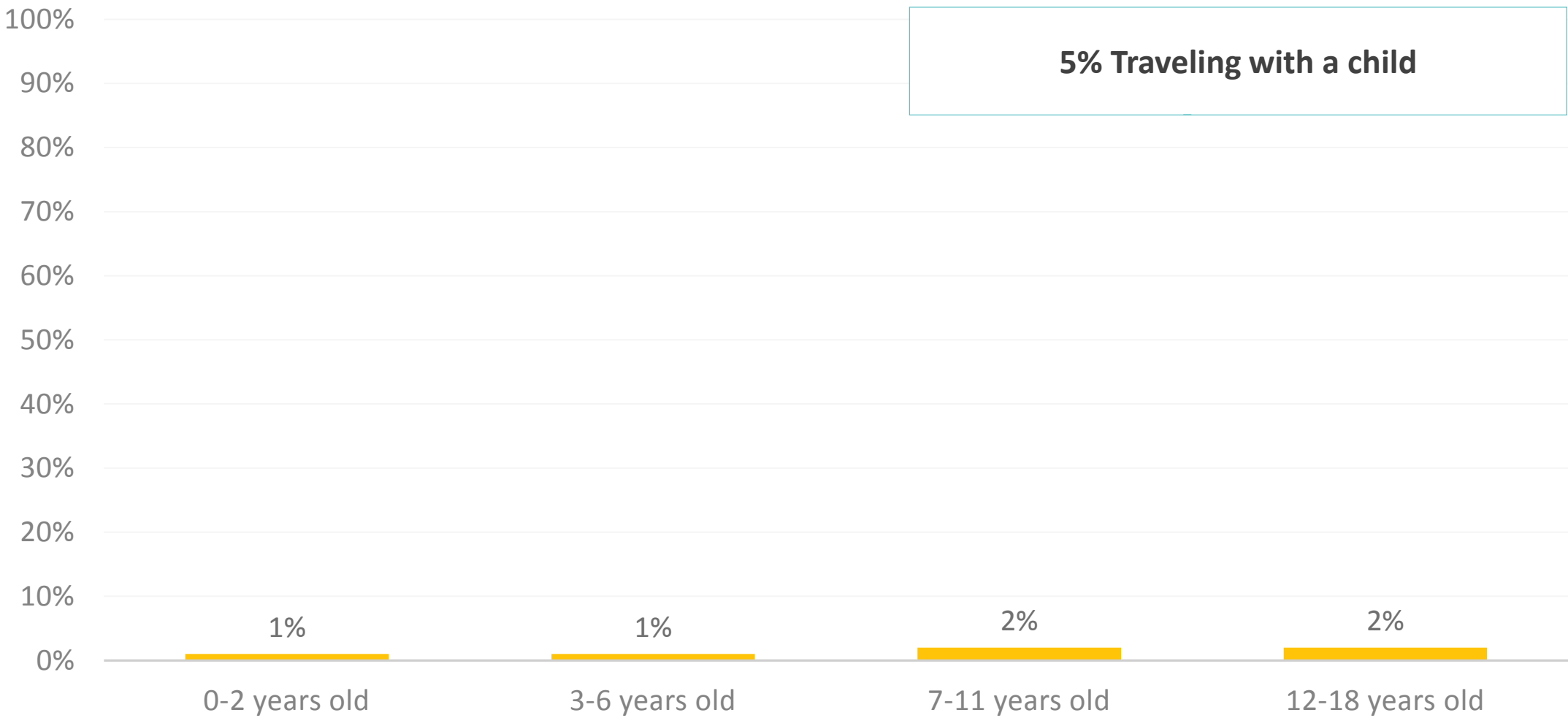




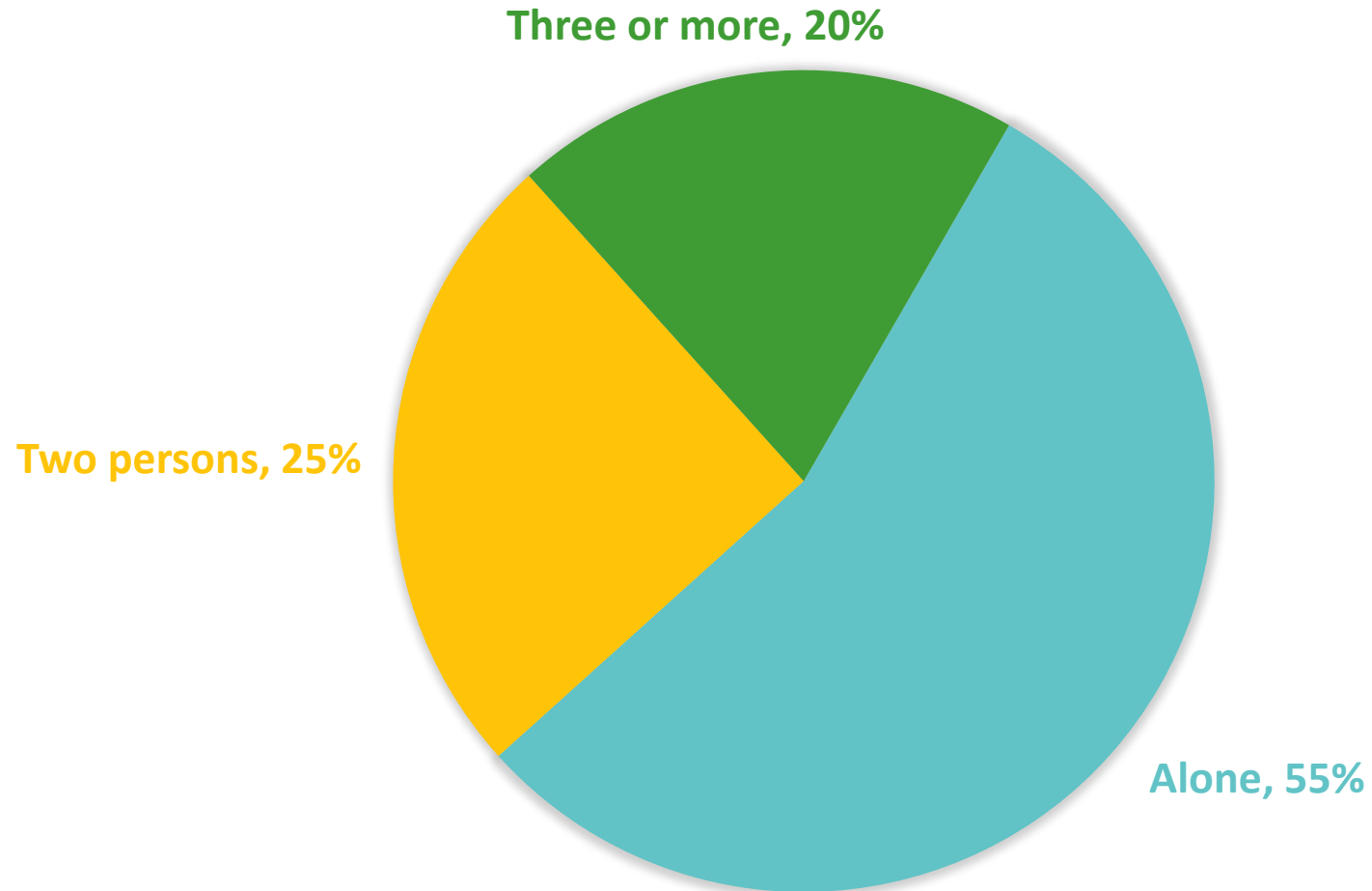
# TRAVEL PARTY – TRACKING



# TRAVEL PARTY – CHILD UNDER 18

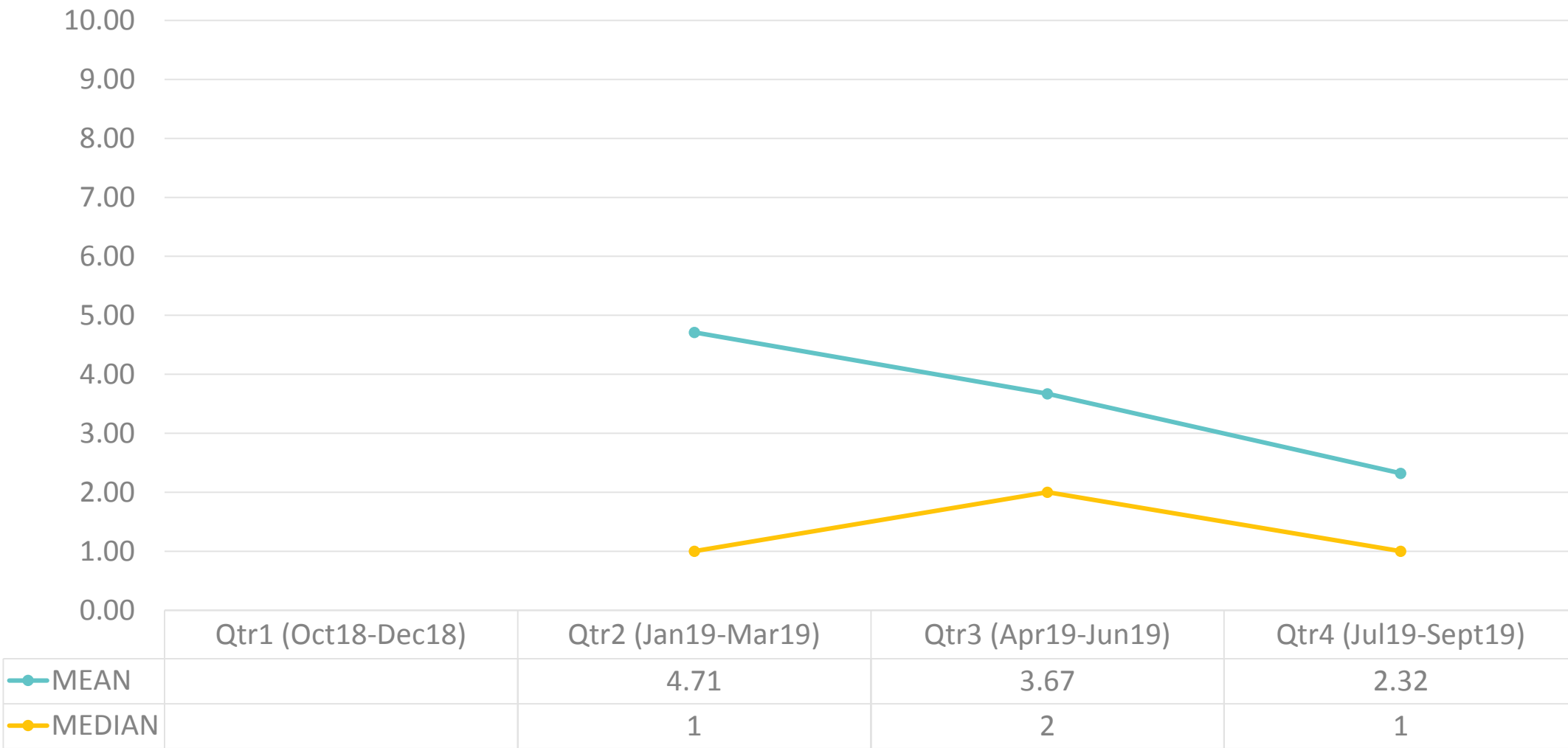


# TRAVEL PARTY SIZE



**Mean = 2.32**  
**Median = 1**

# TRAVEL PARTY SIZE – TRACKING

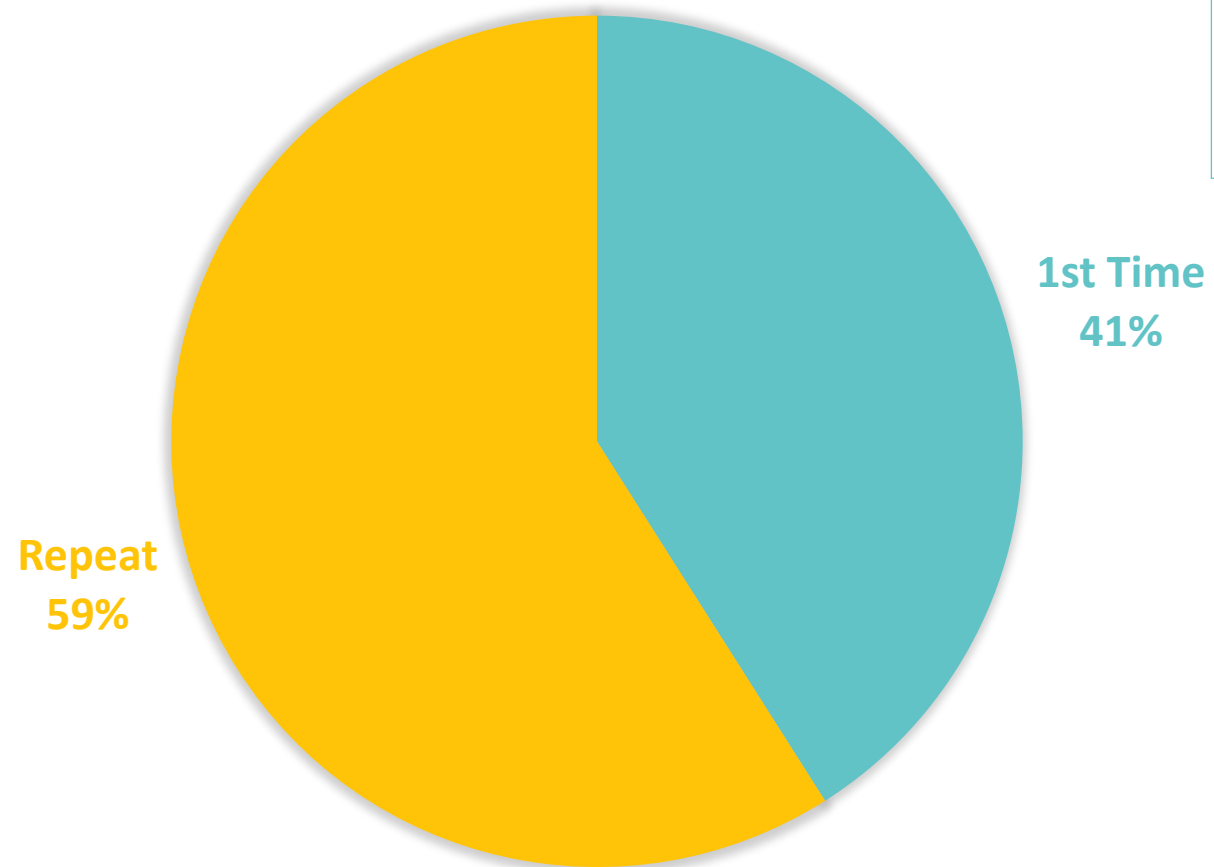


[A]



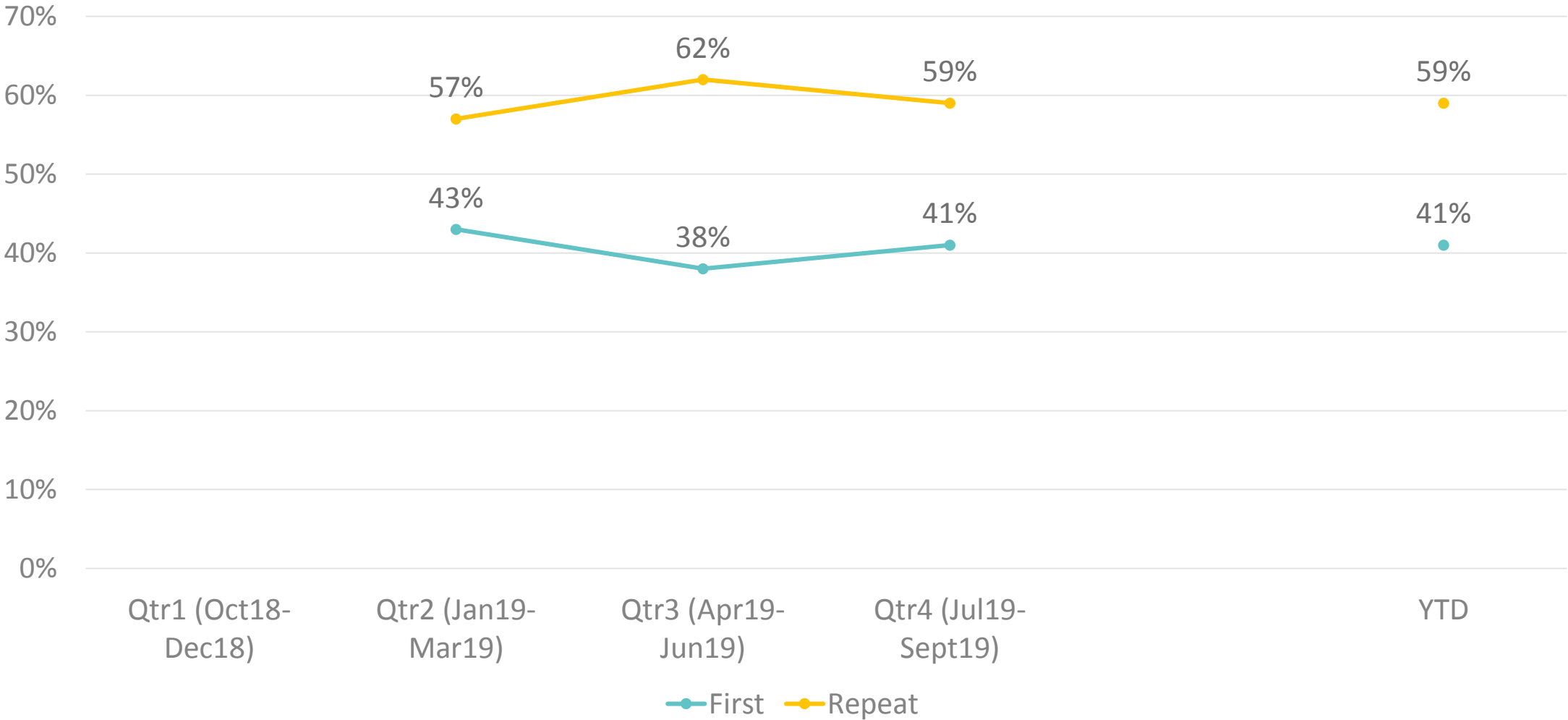


# TRIPS TO GUAM

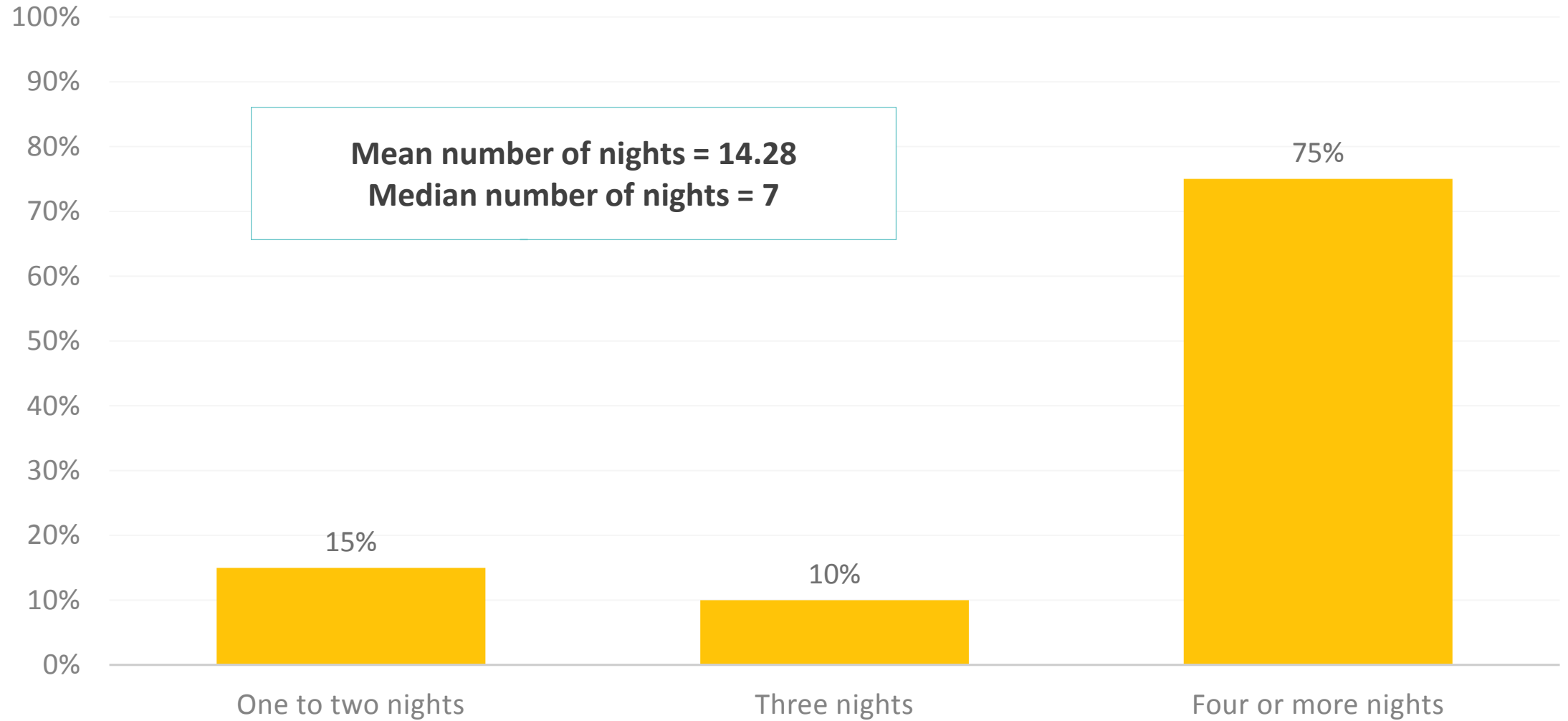


Mean = 5.26  
Median = 2

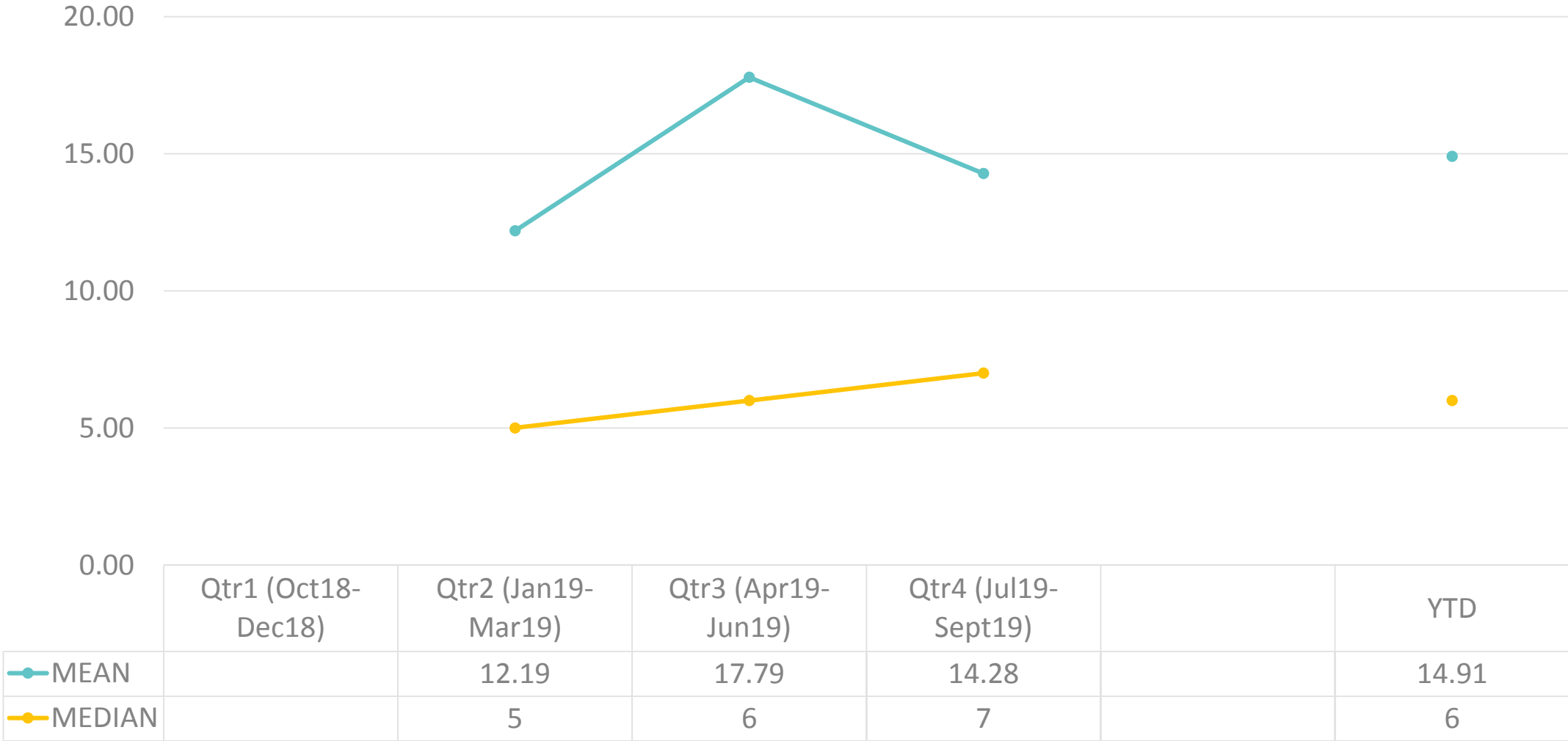
# TRIPS TO GUAM – TRACKING



# LENGTH OF STAY

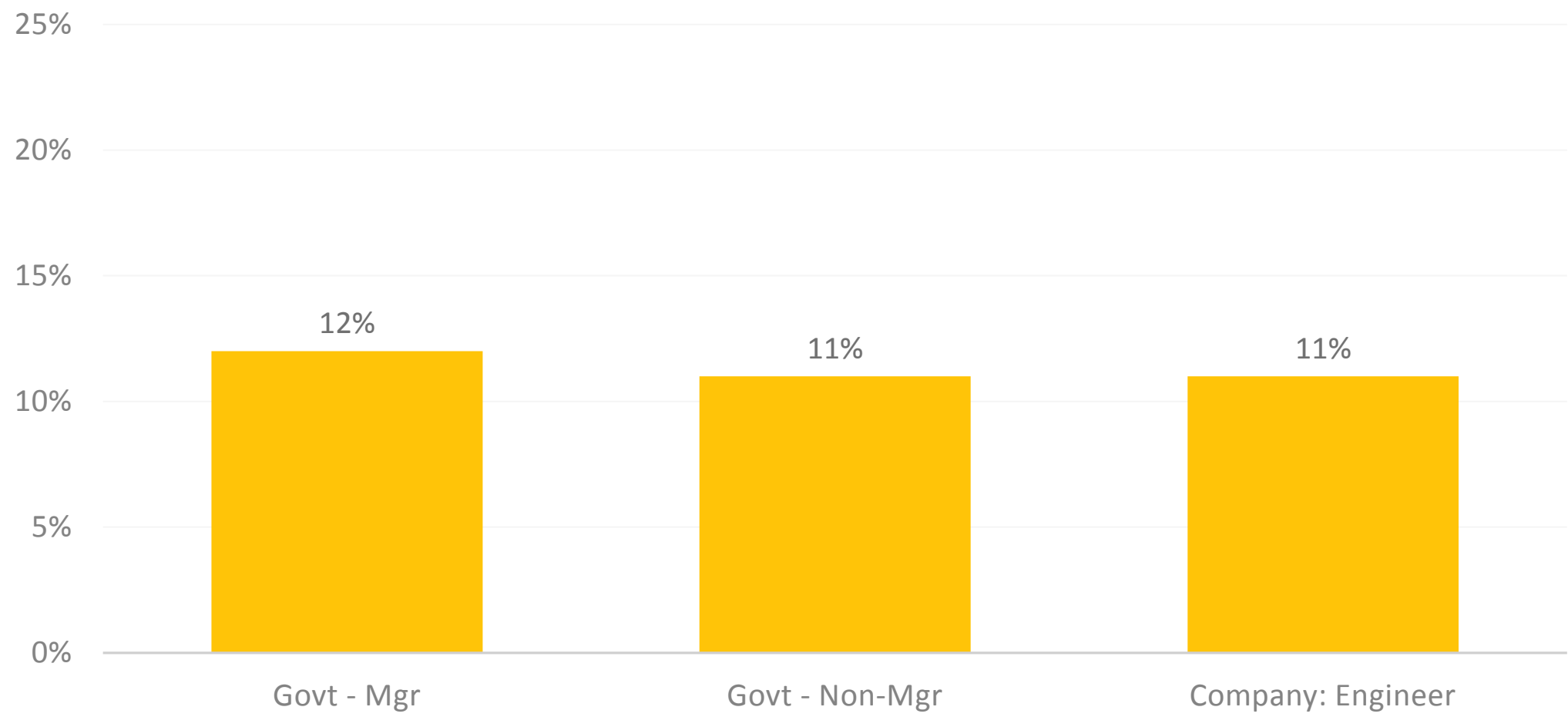


# LENGTH OF STAY – TRACKING





# OCCUPATION – Top Responses (10%+)



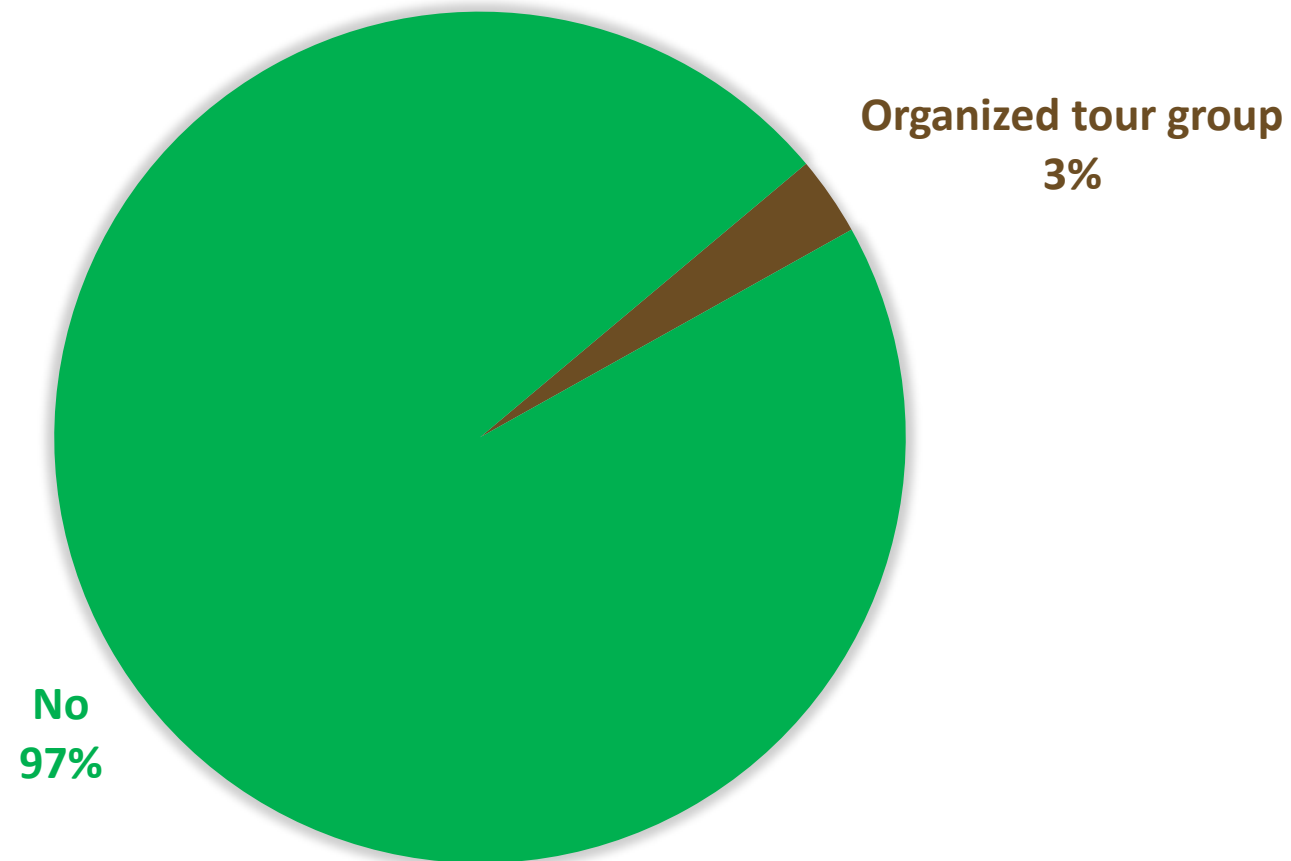


SECTION 2

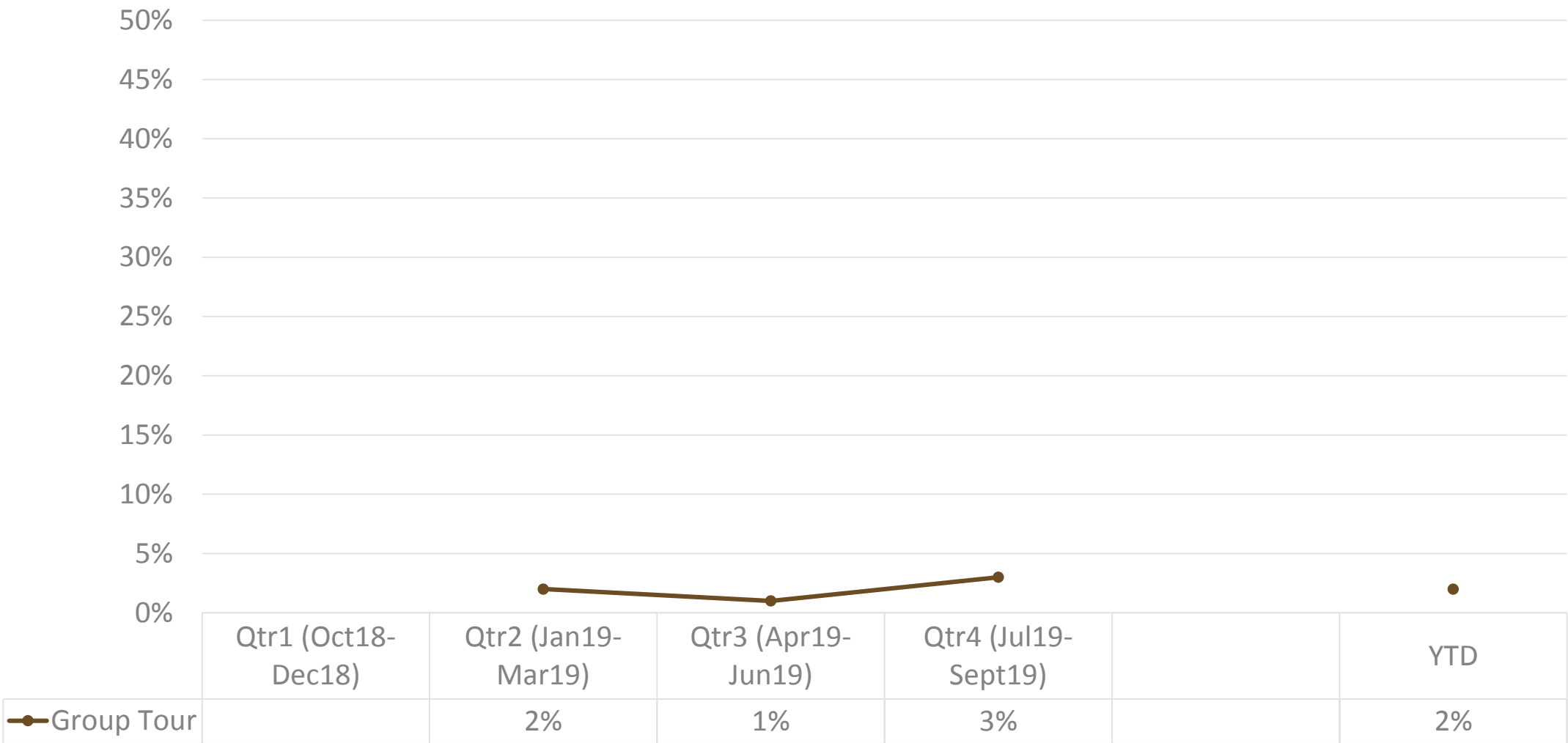
# TRAVEL PLANNING



# ORGANIZED TOUR GROUP

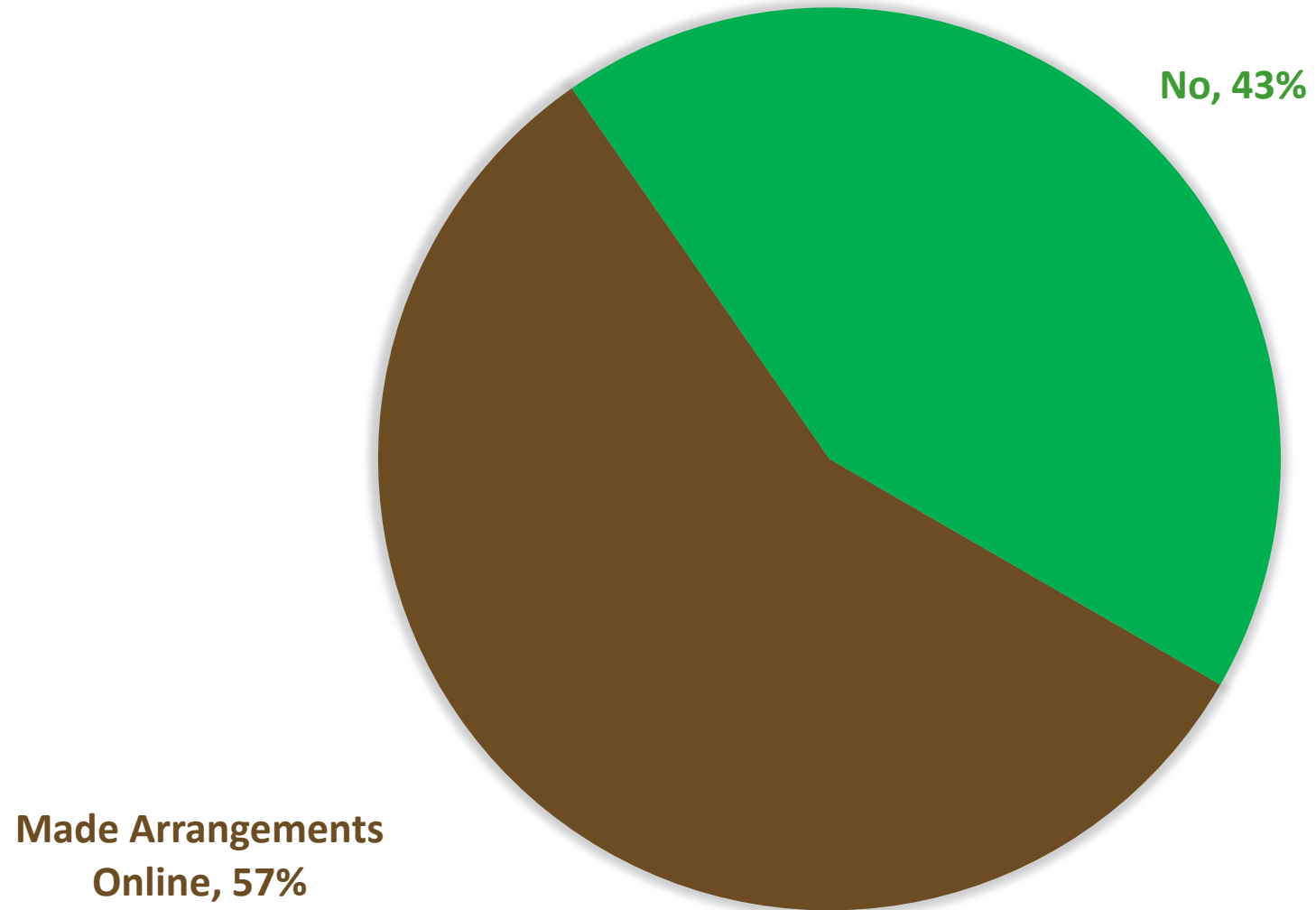


# ORGANIZED TOUR GROUP – TRACKING





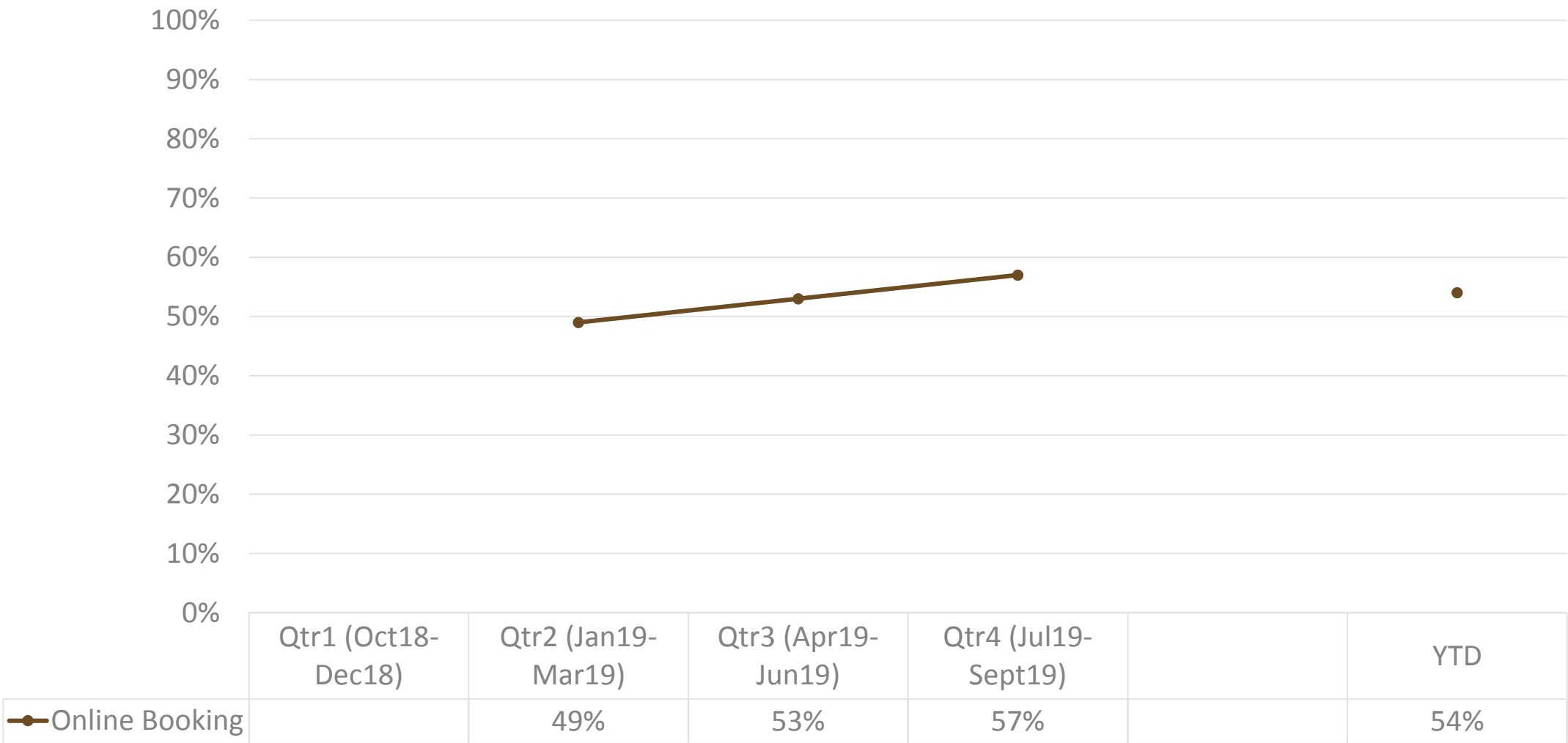
# ONLINE BOOKING



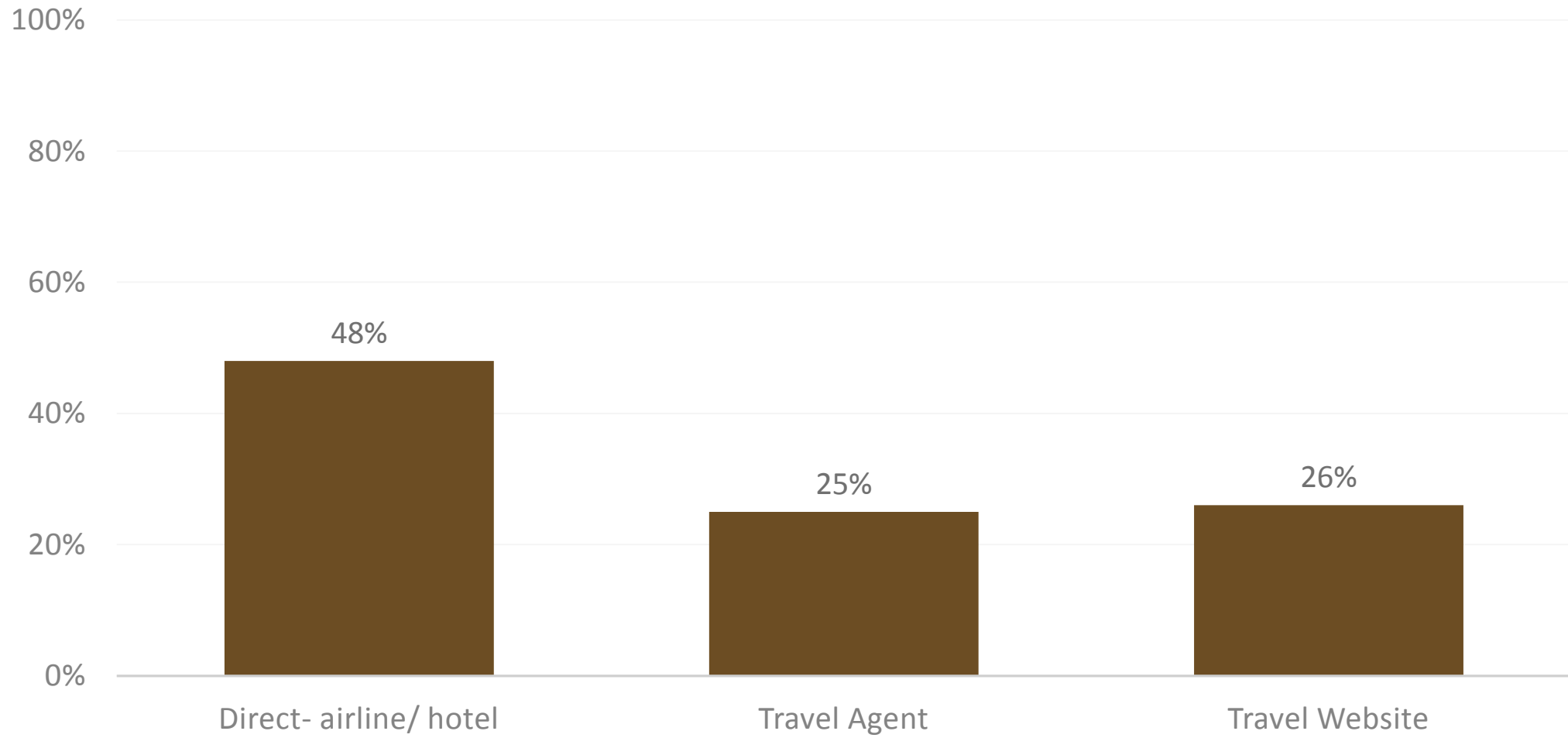
**Made Arrangements  
Online, 57%**

**No, 43%**

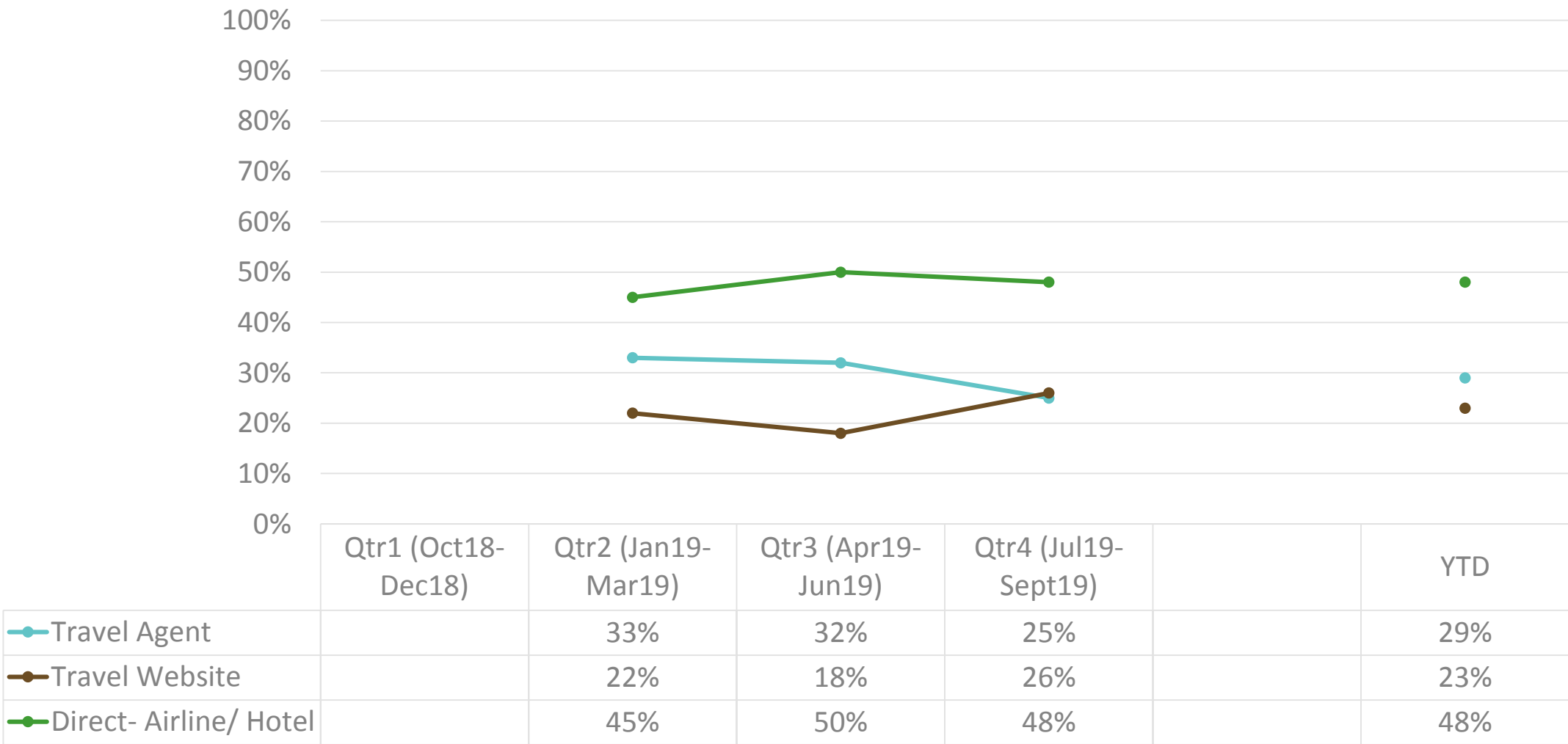
# ONLINE BOOKING – TRACKING



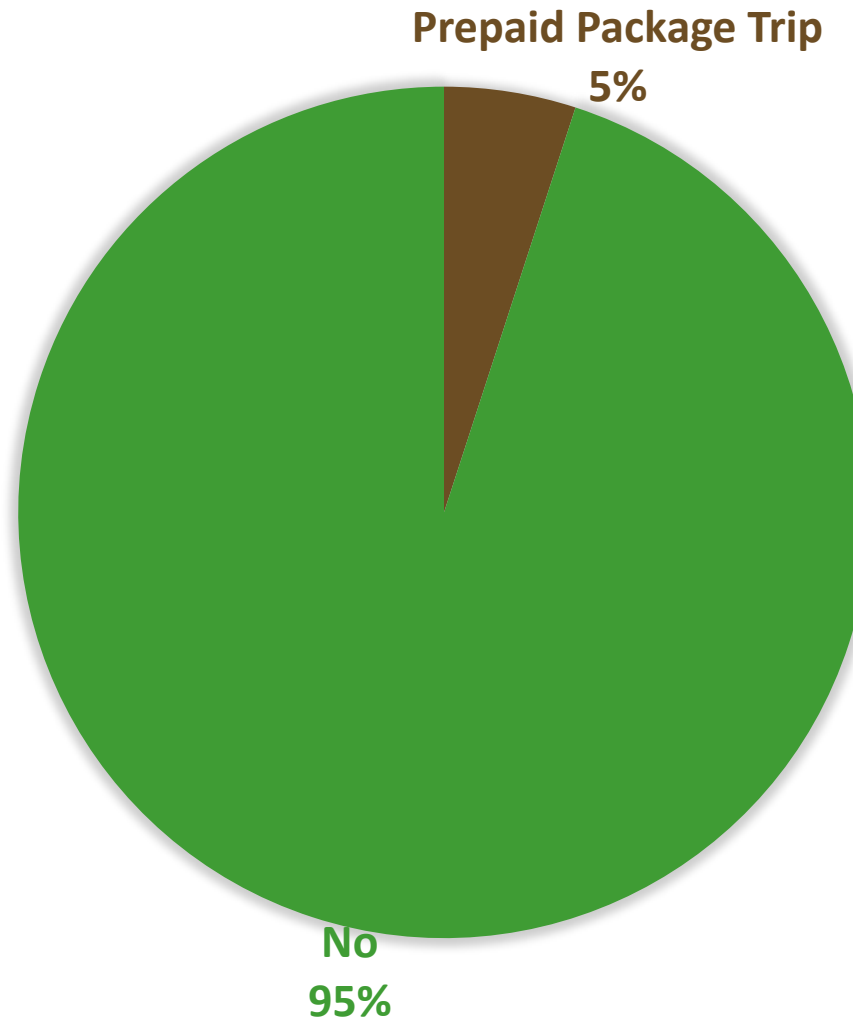
# TRAVEL ARRANGEMENTS



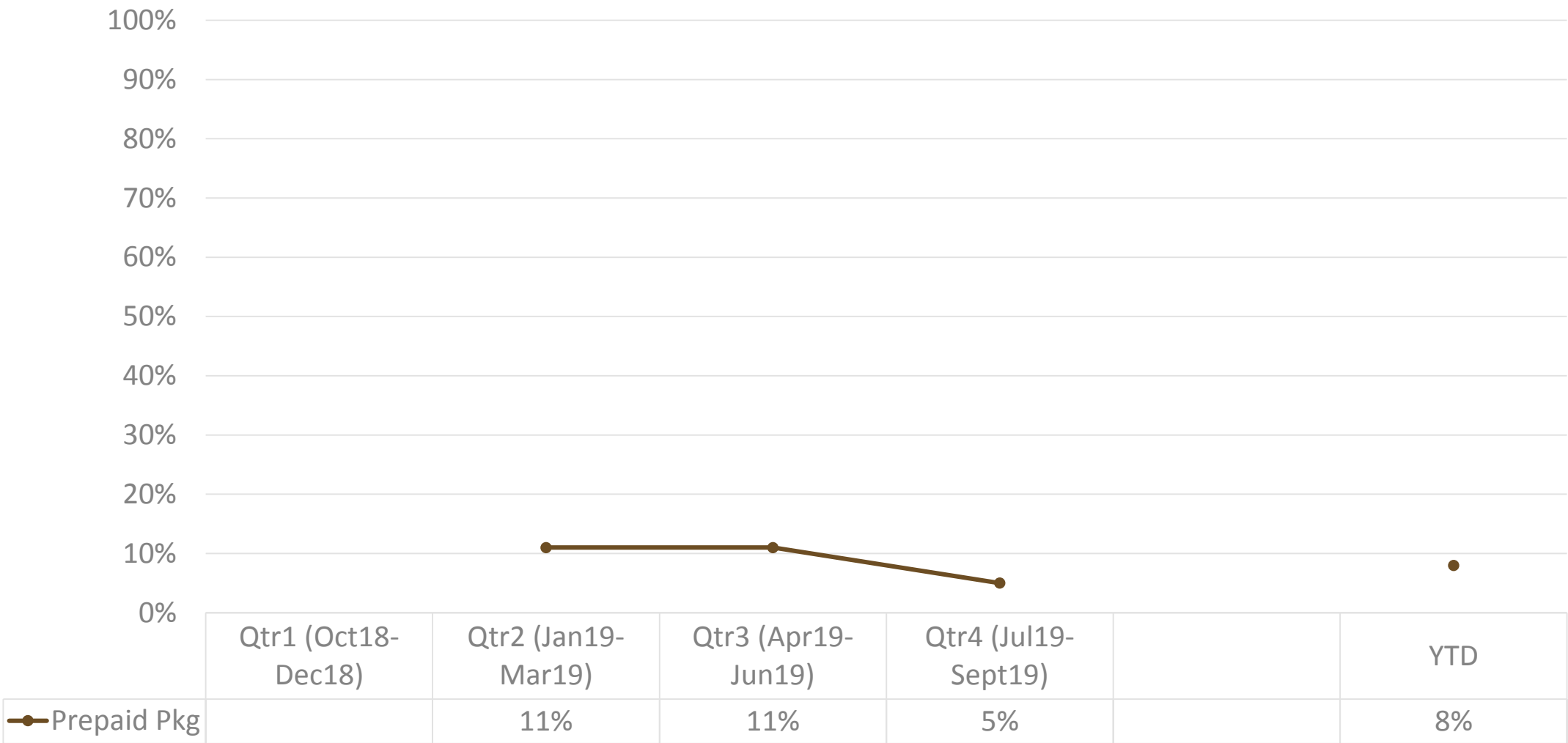
# TRAVEL ARRANGEMENTS – TRACKING



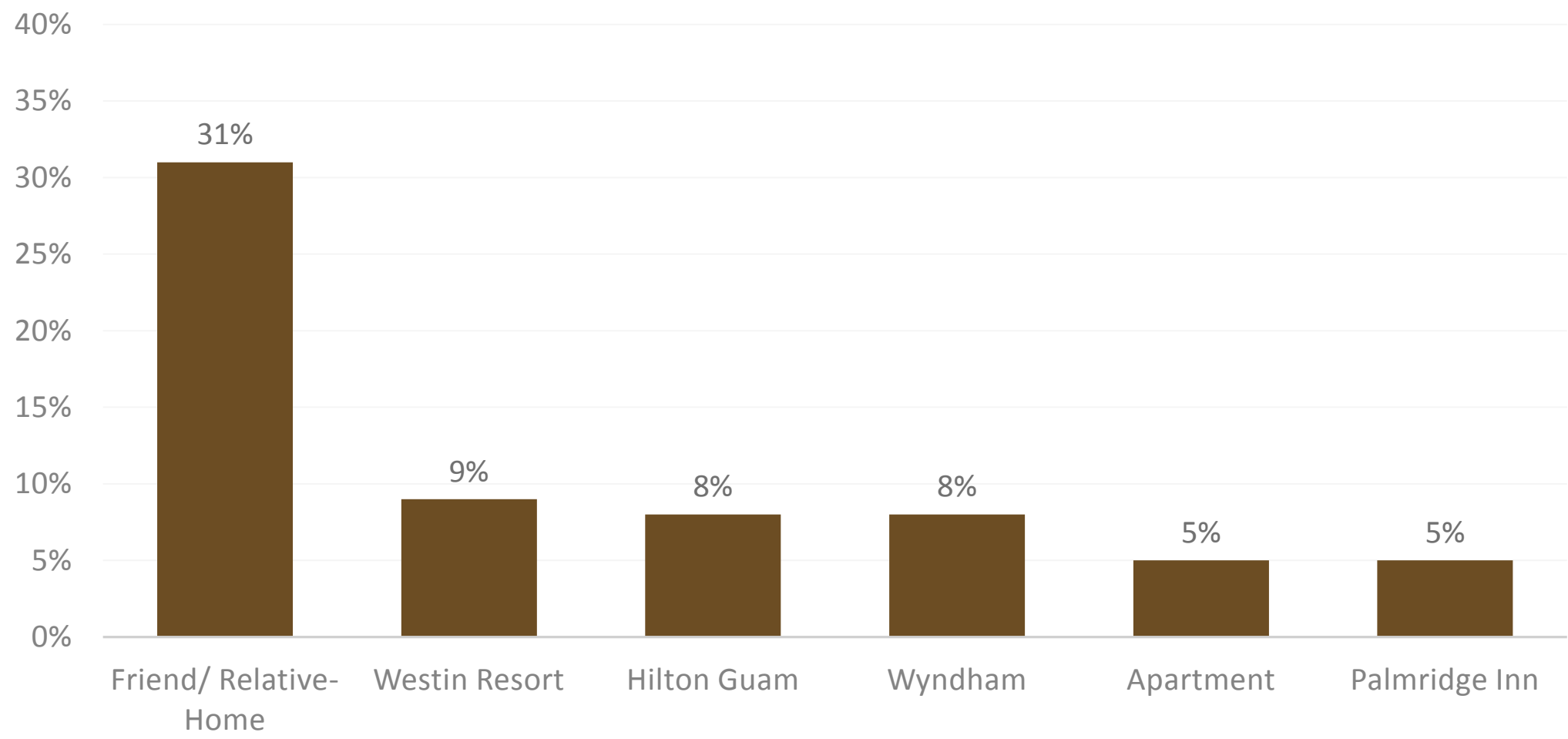
# PREPAID PACKAGE TRIP



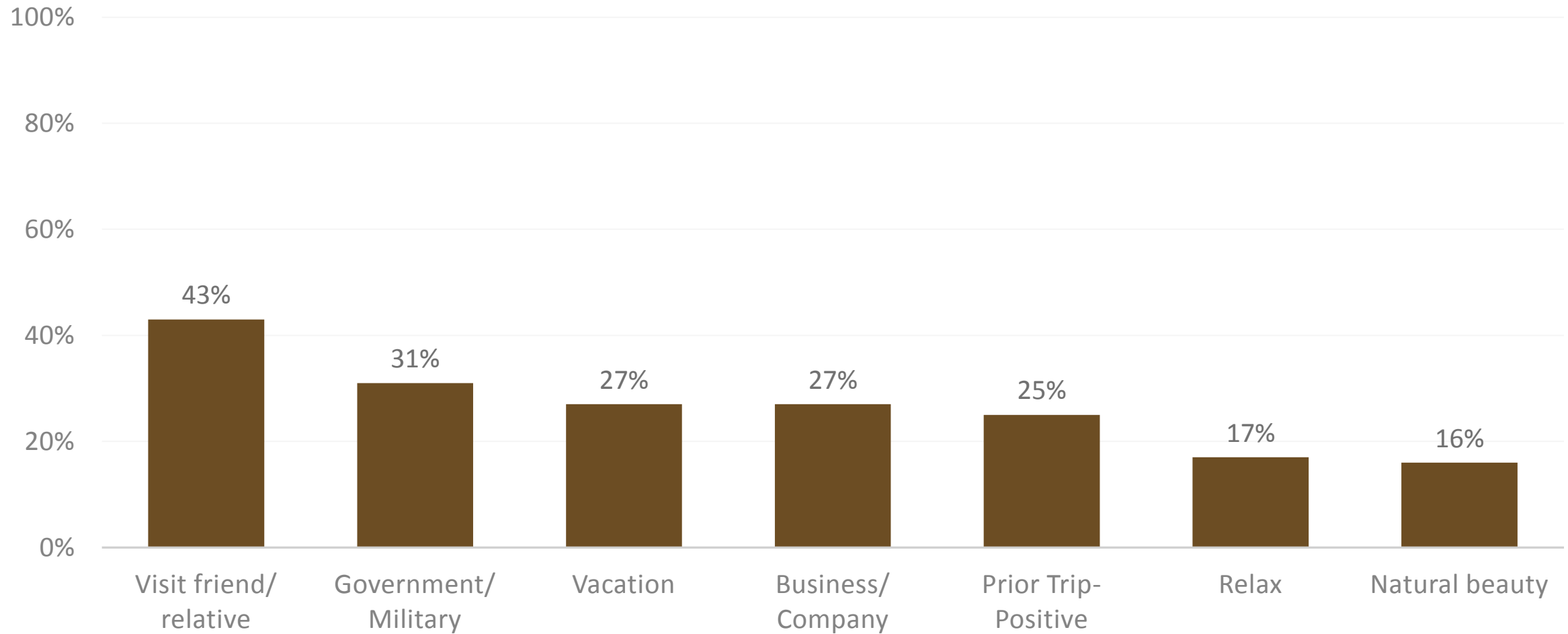
# PREPAID PACKAGE TRIP



# ACCOMMODATIONS (5%+)



# TRAVEL MOTIVATIONS (10%+)







SECTION 3

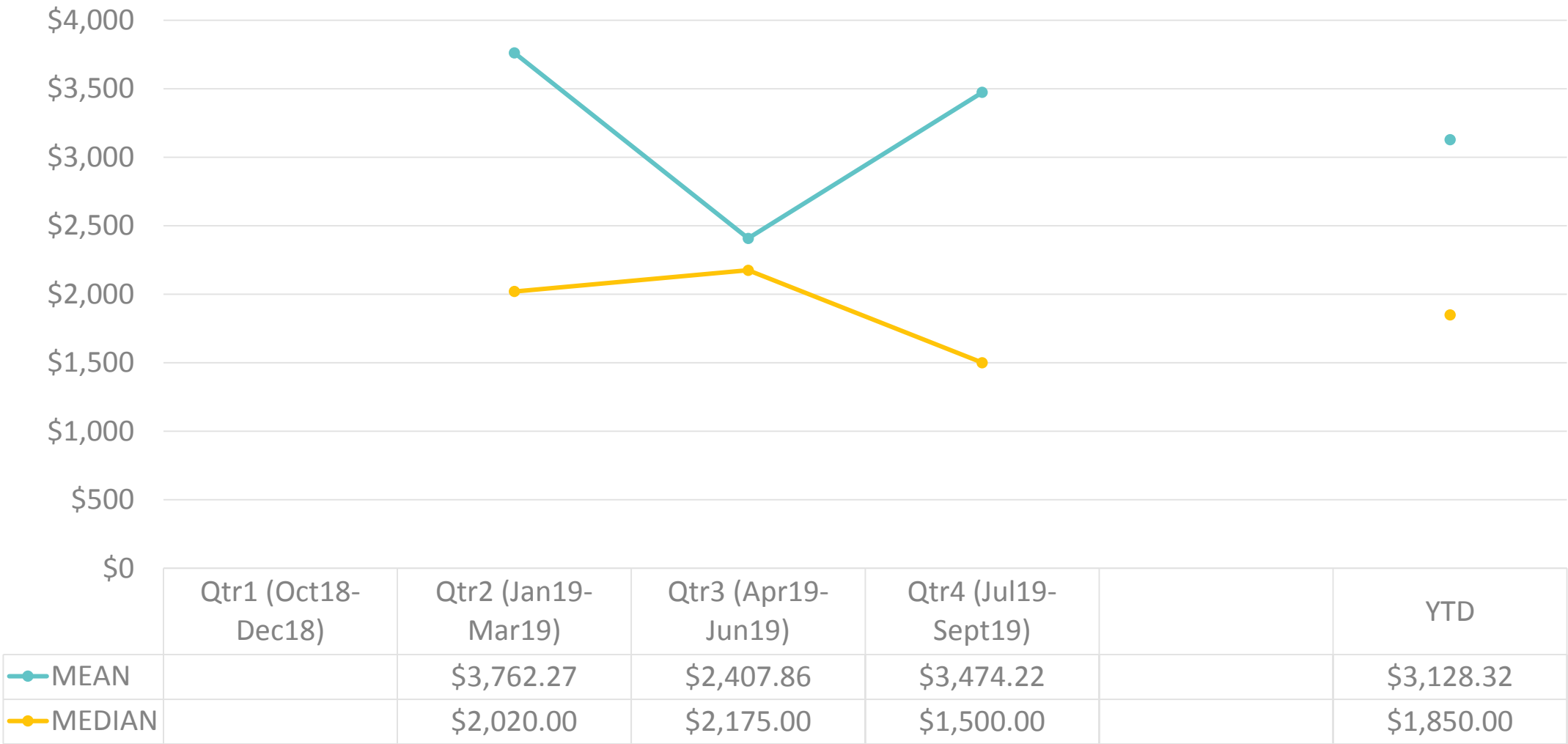
# EXPENDITURES



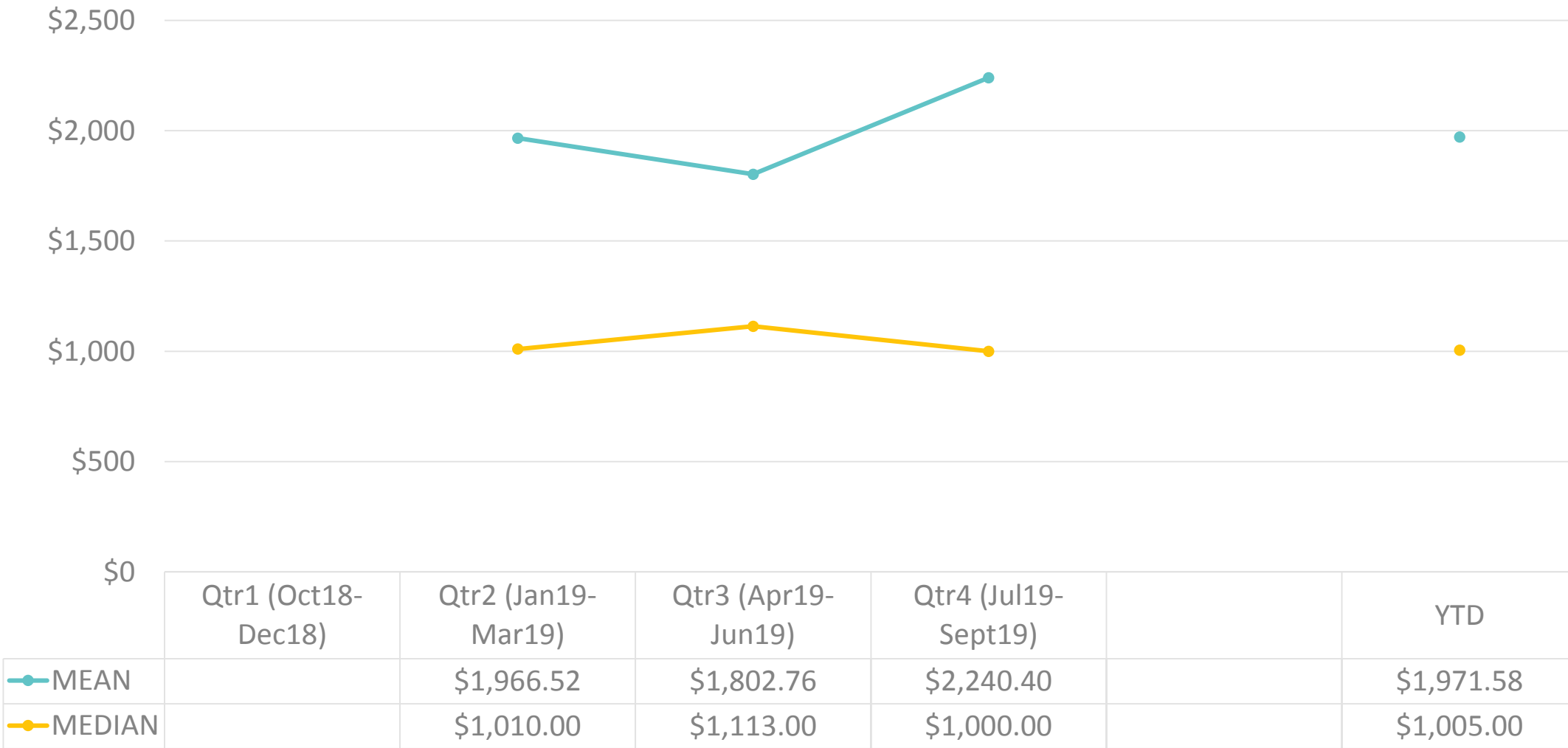
# PREPAID PACKAGE EXPENDITURES

- \$3,474.22 = overall mean average prepaid package expense (for entire travel party) by respondent
- \$2,240.40 = overall mean average **per person** prepaid package expenditures

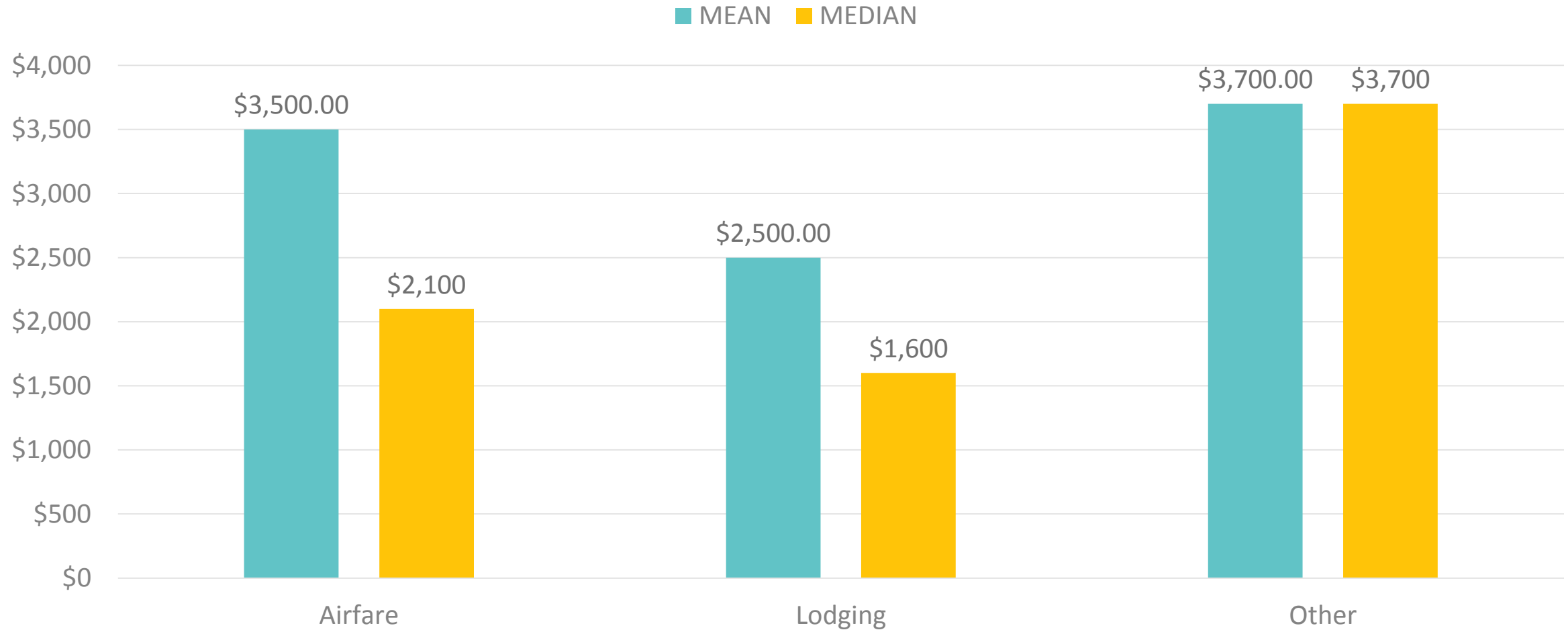
# PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING



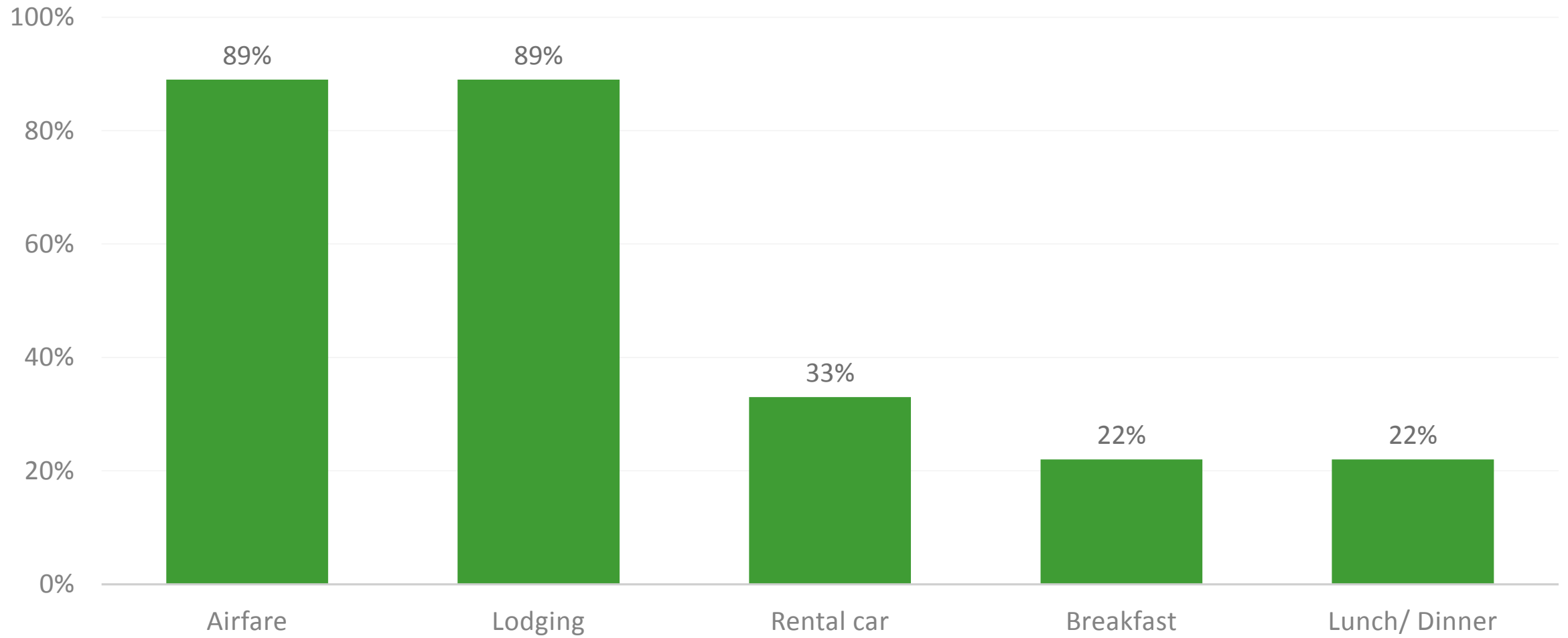
# PREPAID PACKAGE – PER PERSON EXPENSE TRACKING



# PREPAID PACKAGE – BREAKDOWN



# PREPAID PACKAGE – BREAKDOWN

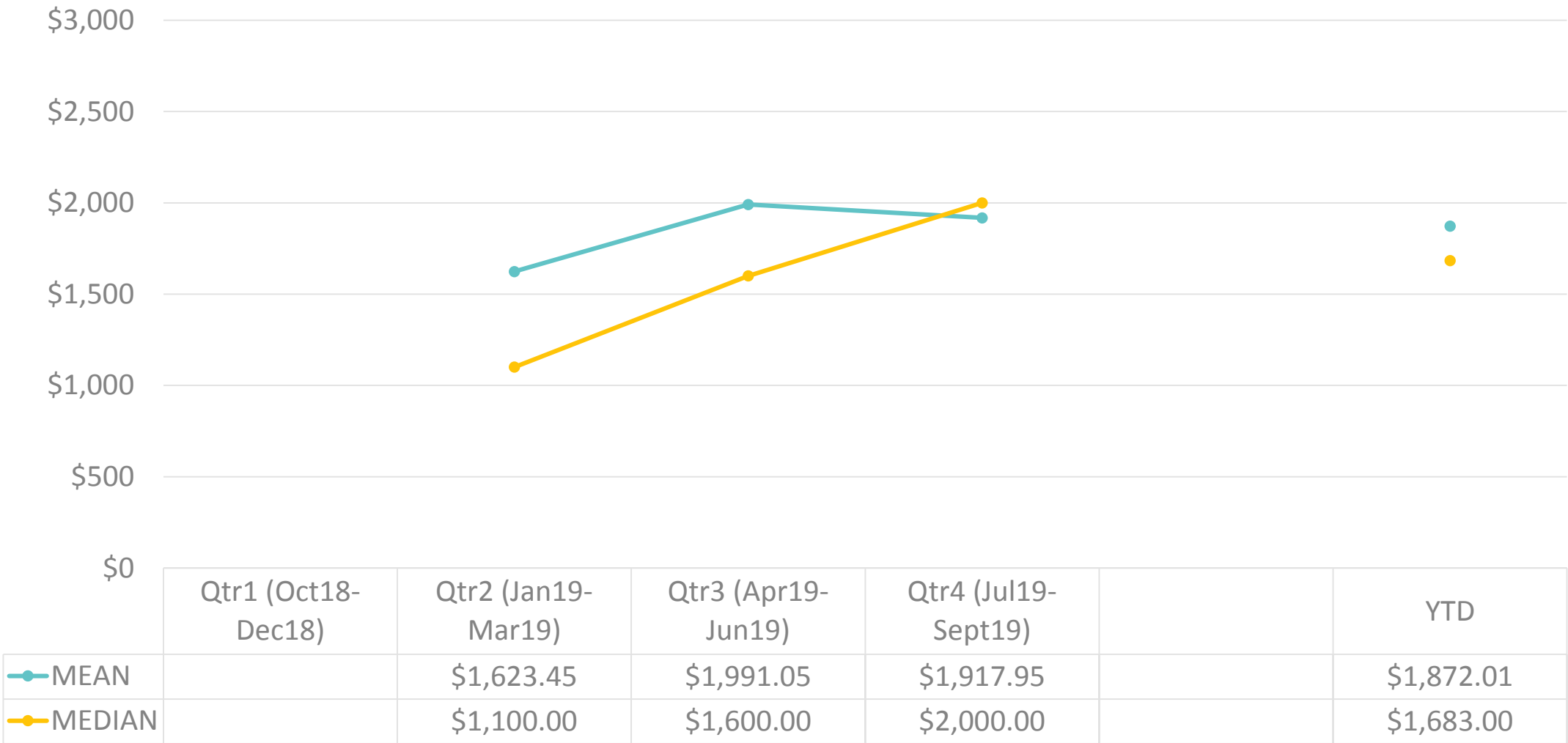


# AIRFARE – FIT TRAVELER

- \$1,917.95 = overall mean average airfare expense (for entire travel party) by respondent
- \$1,557.65 = overall mean average **per person** airfare expenditures

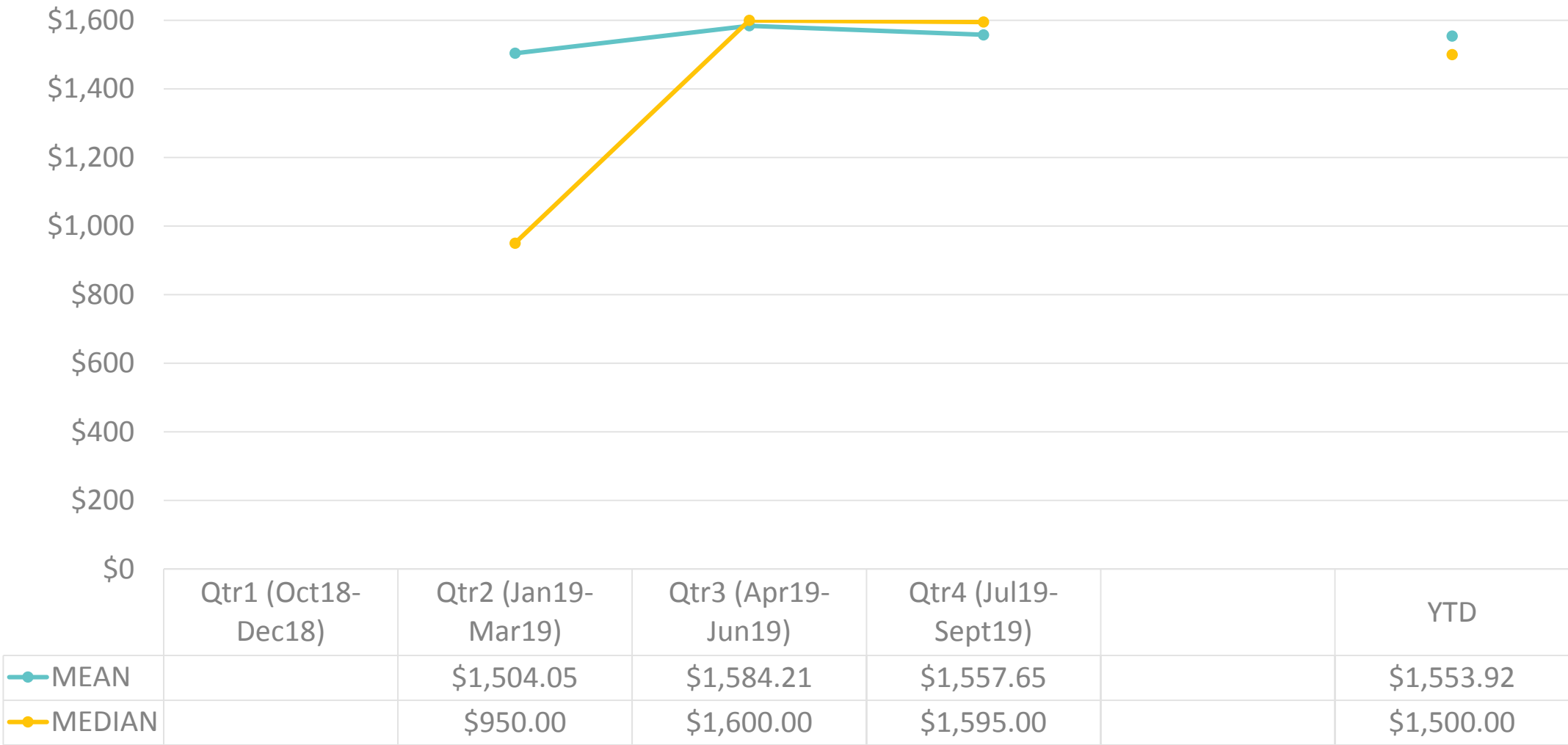


# AIRFARE – FIT TRAVELER (GROUP) TRACKING





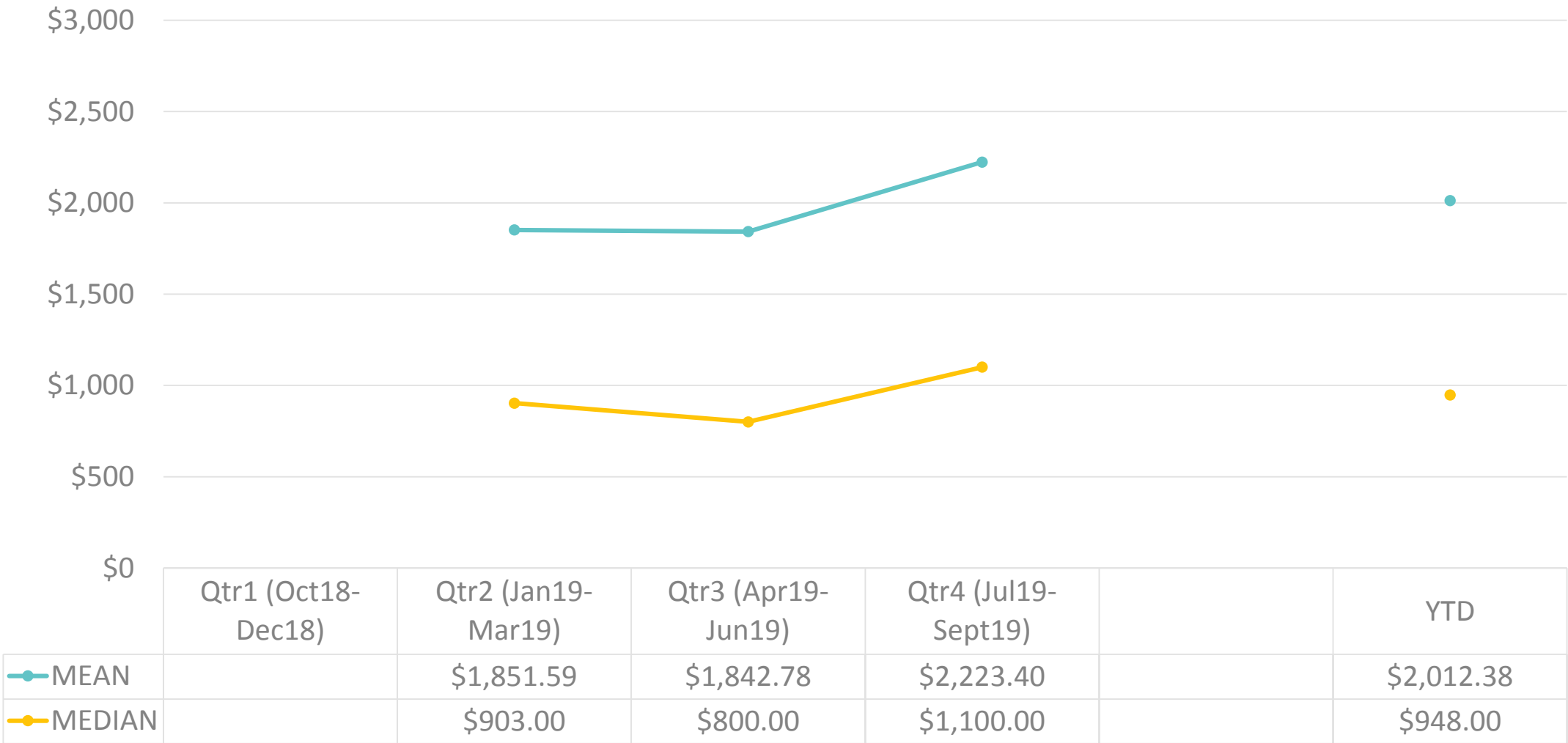
# AIRFARE – FIT TRAVELER (Per Person) TRACKING



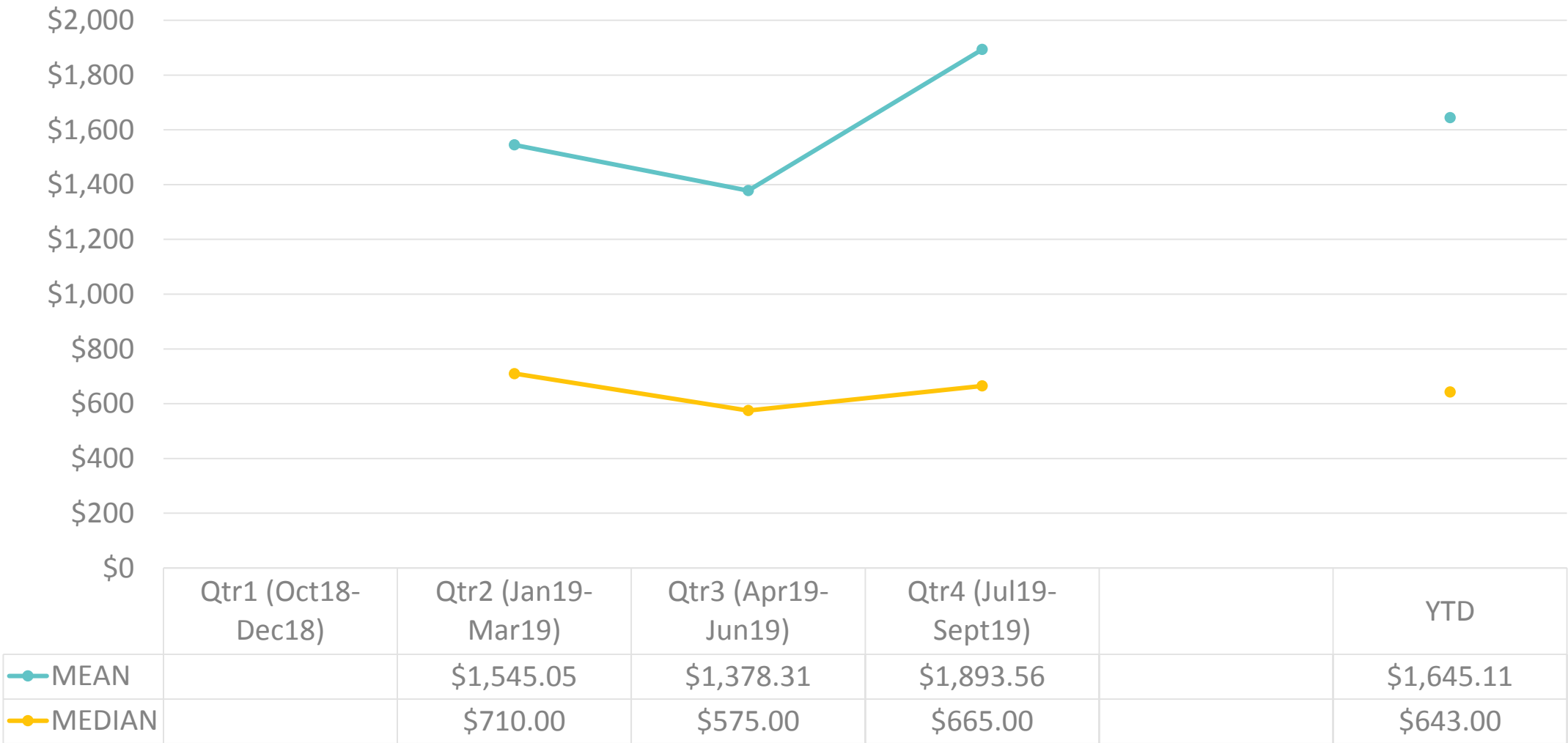
# ONISLE EXPENDITURES

- \$2,223.40 = overall mean average expense (for entire travel party) by respondent
- \$1,893.56 = overall mean average **per person** expenditures

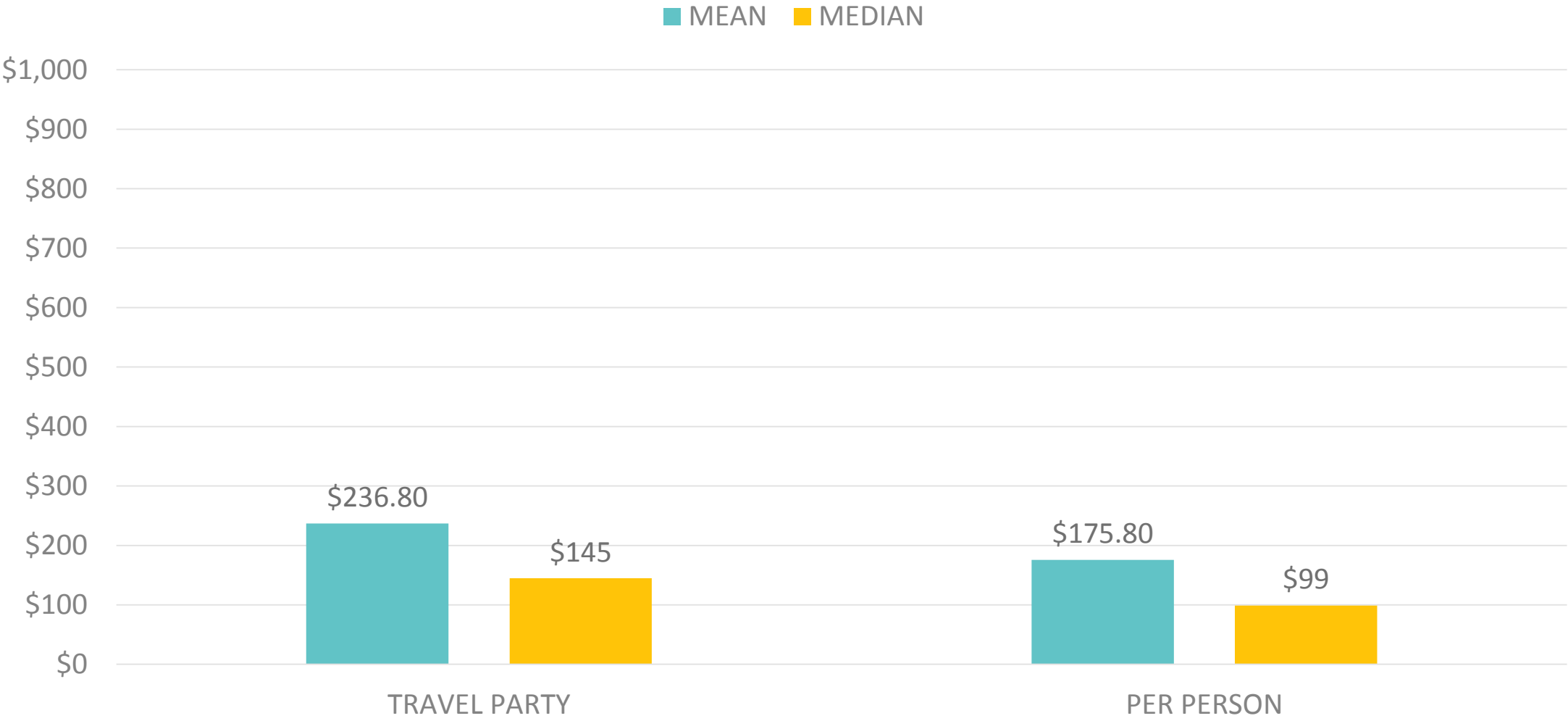
# ONISLE – TRAVEL PARTY TRACKING



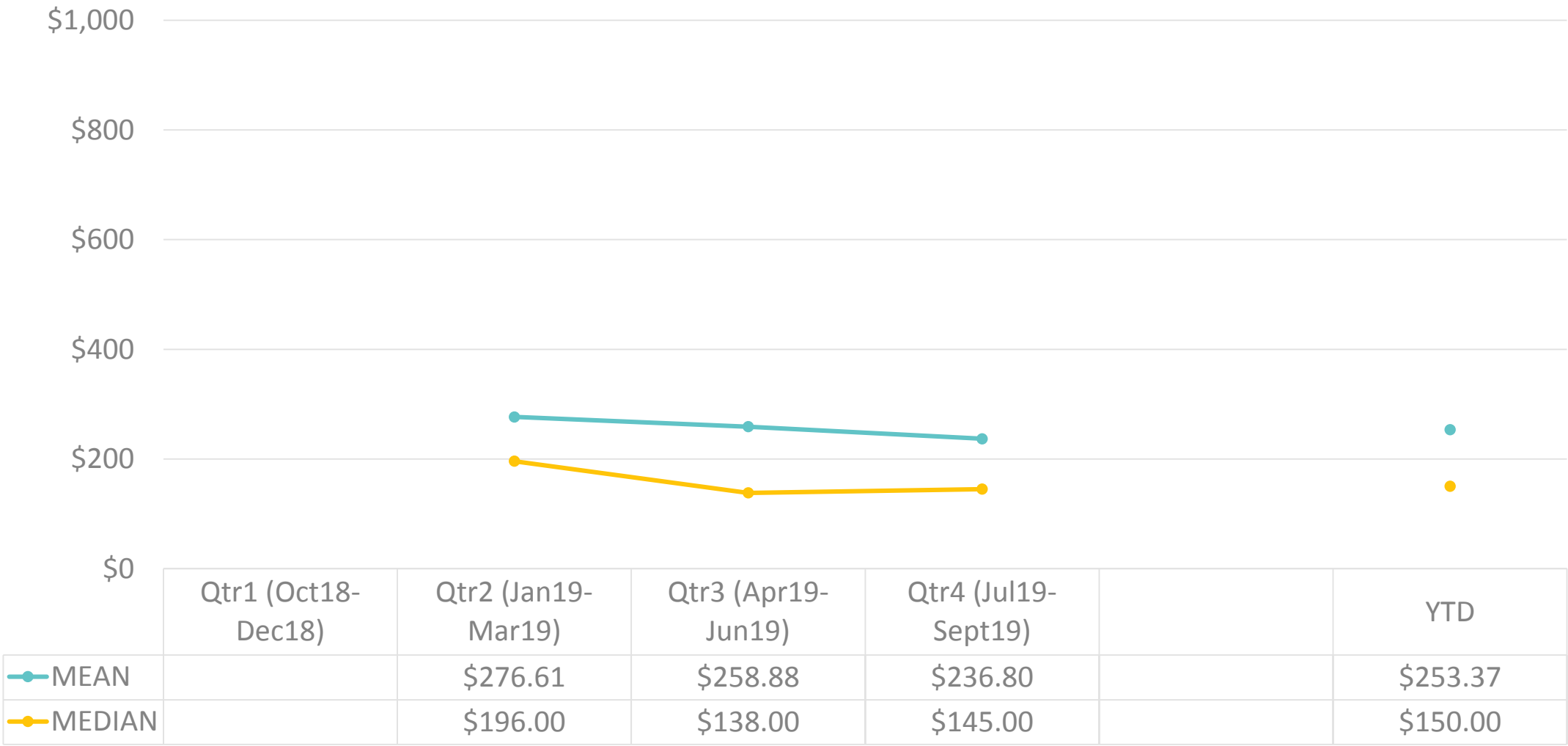
# ONISLE – PER PERSON TRACKING



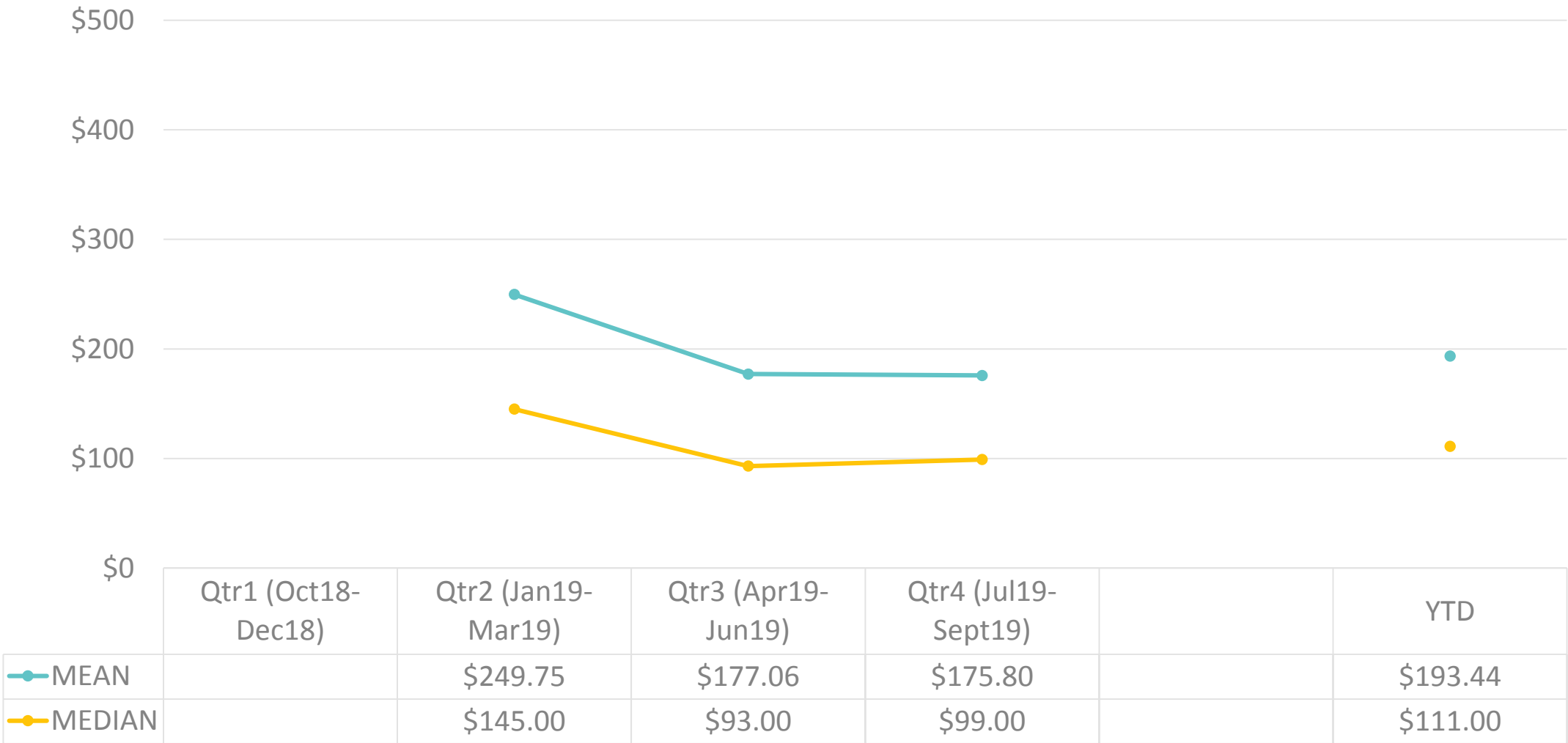
# ONISLE – PER DAY SPENDING



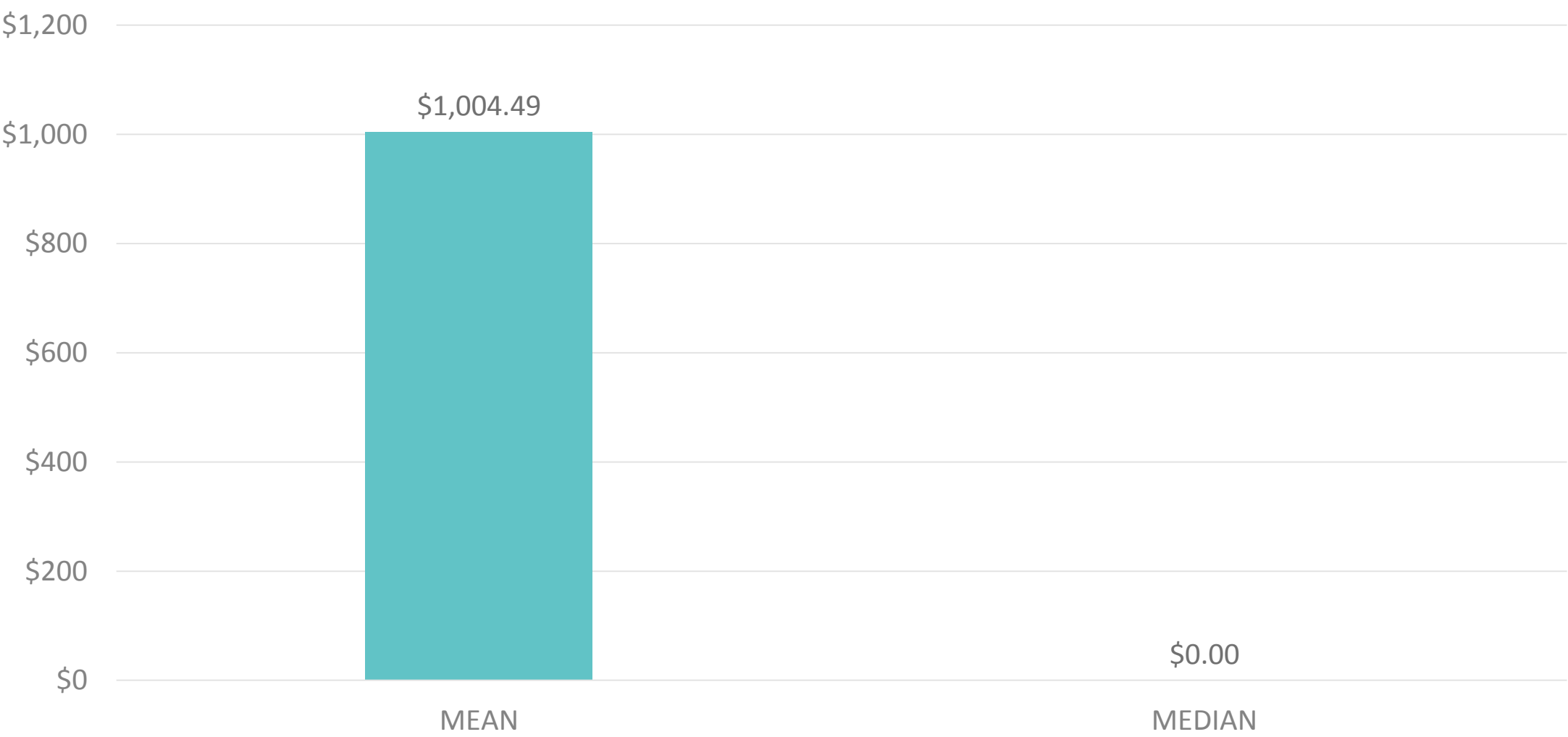
# ONISLE – TRAVEL PARTY/ PER DAY TRACKING



# ONISLE – PER PERSON/ PER DAY TRACKING

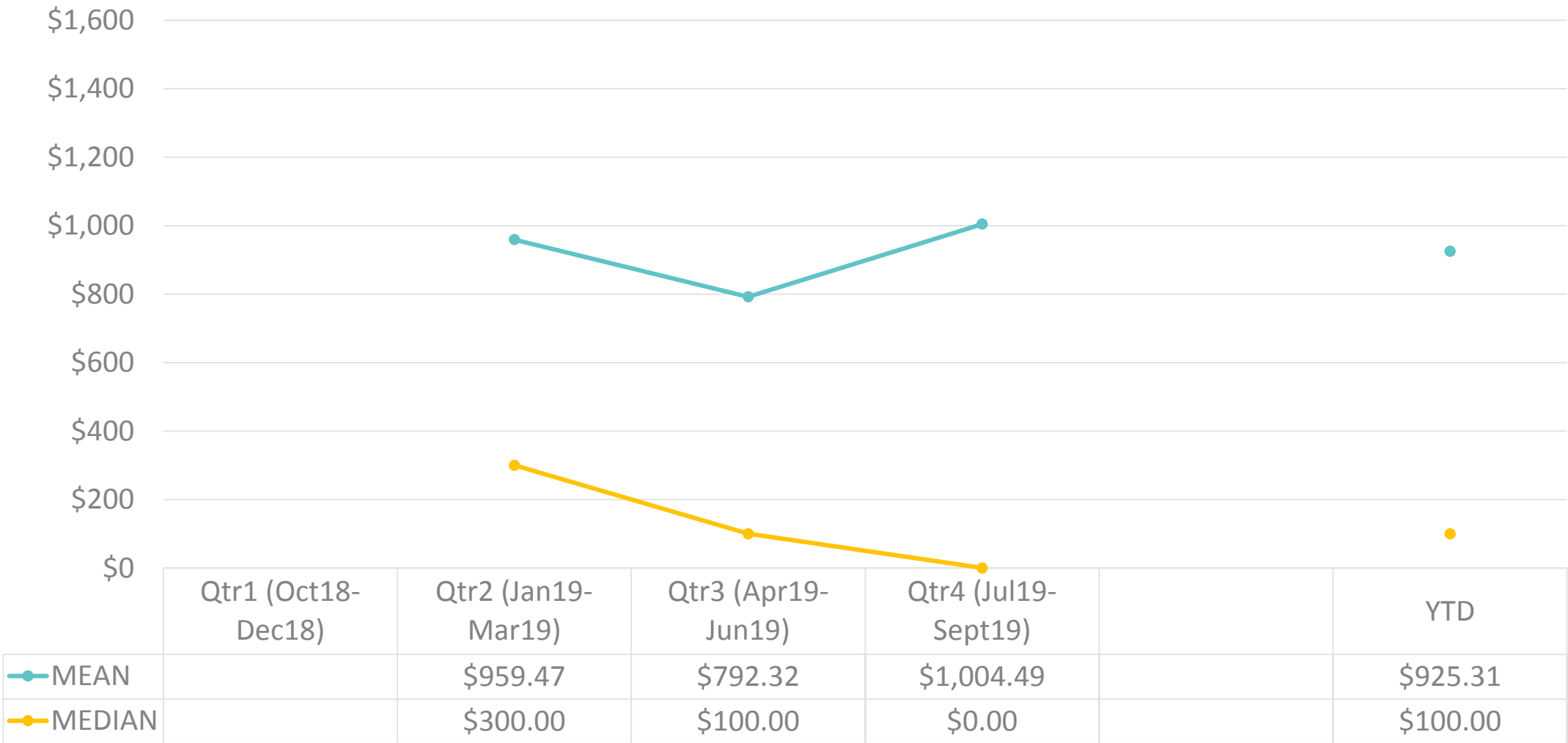


# ONISLE – ACCOMMODATIONS

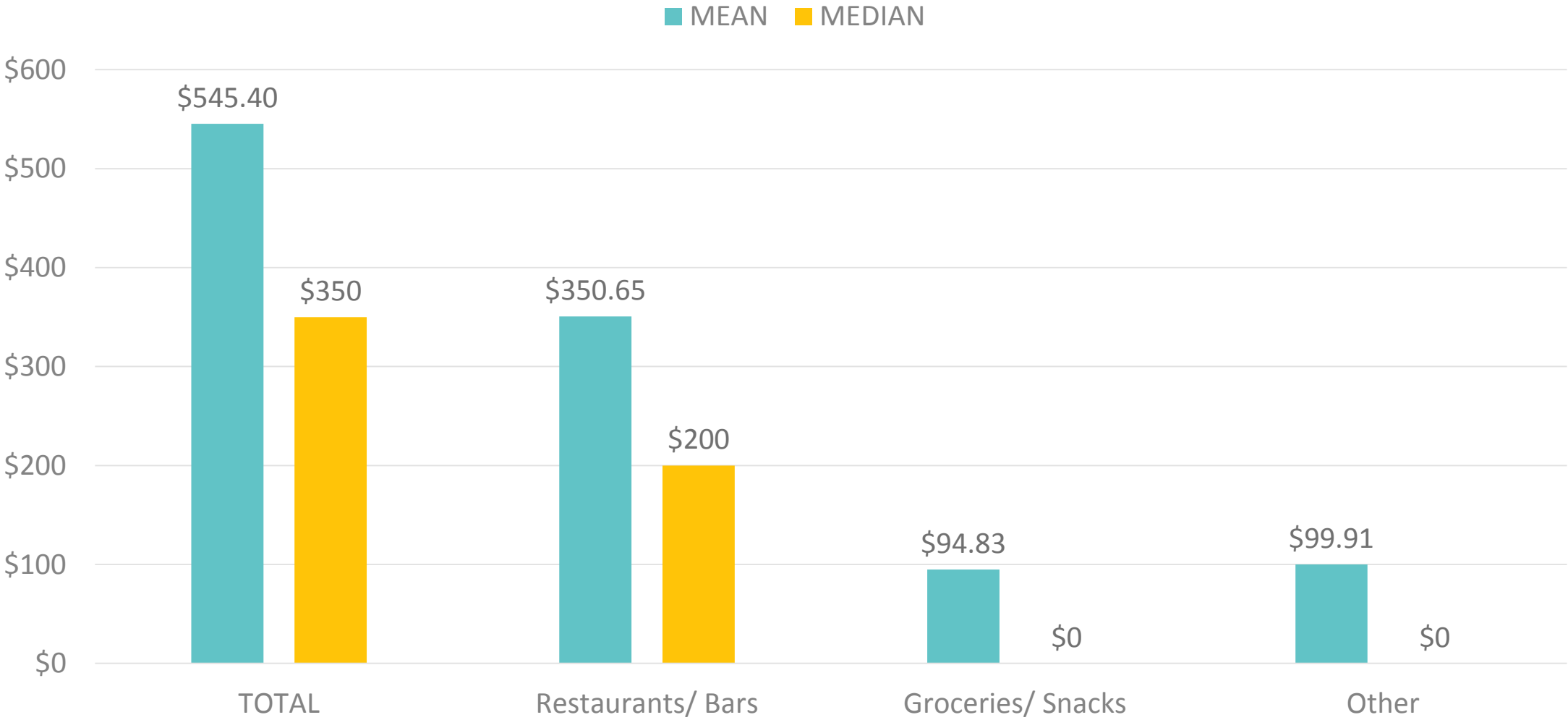




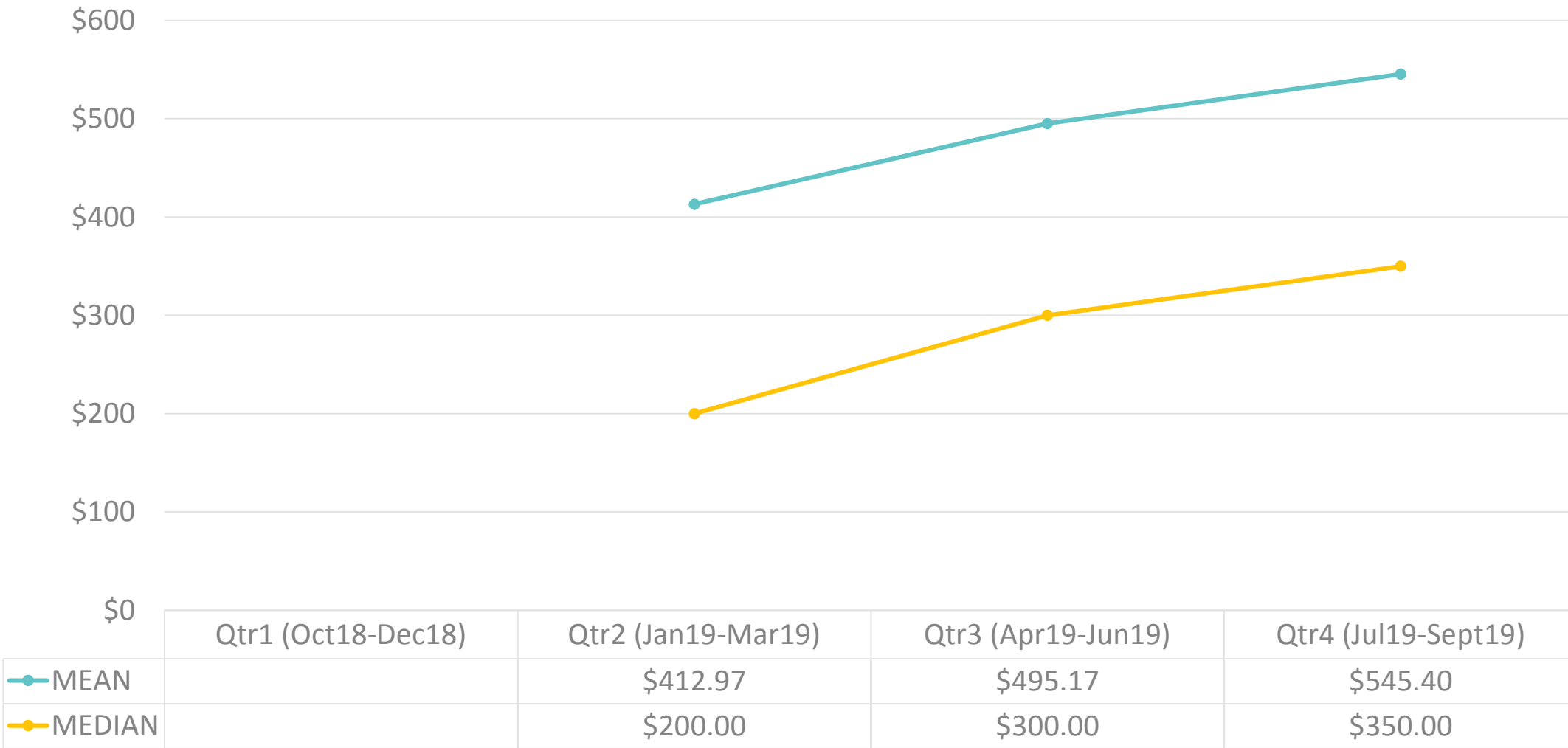
# ONISLE – ACCOMMODATIONS TRACKING



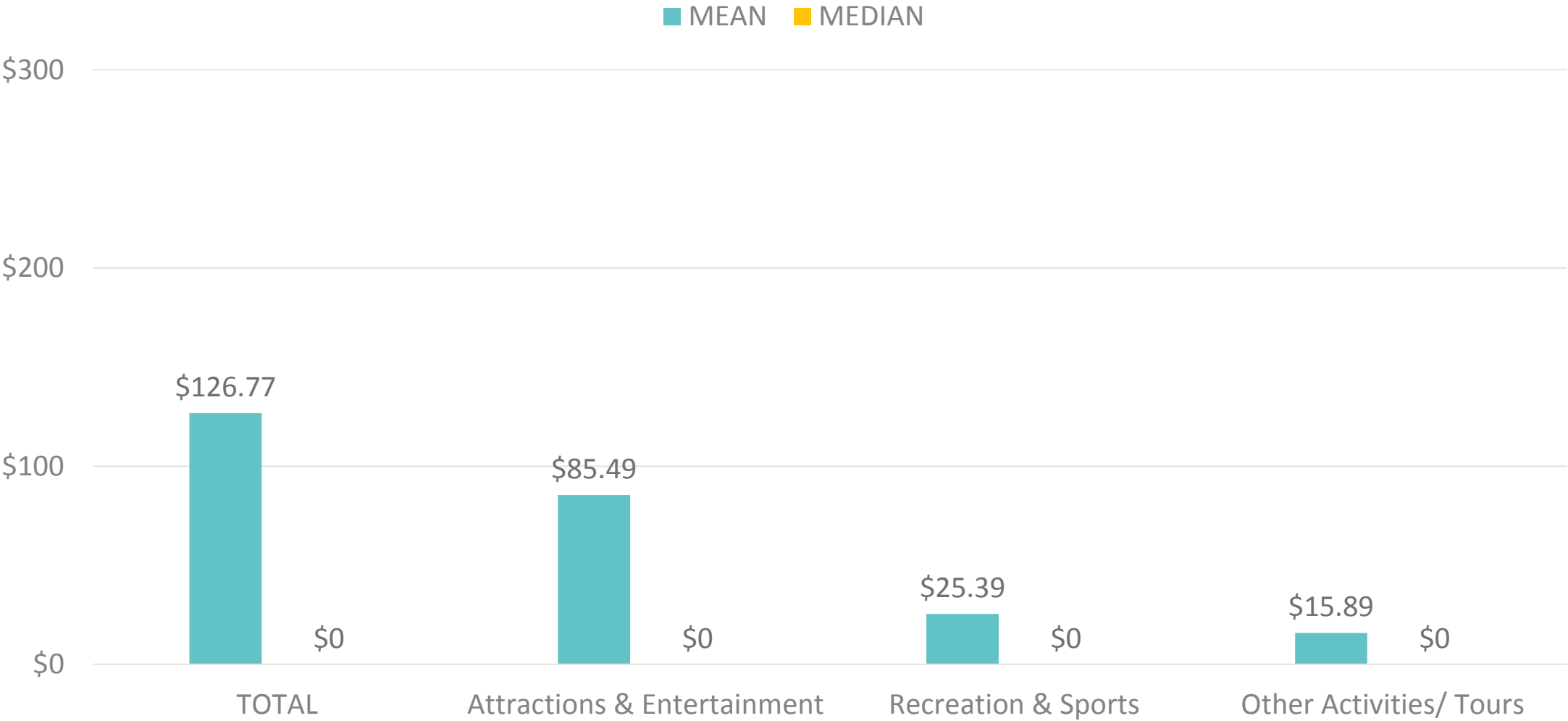
# ONISLE – FOOD & BEVERAGE



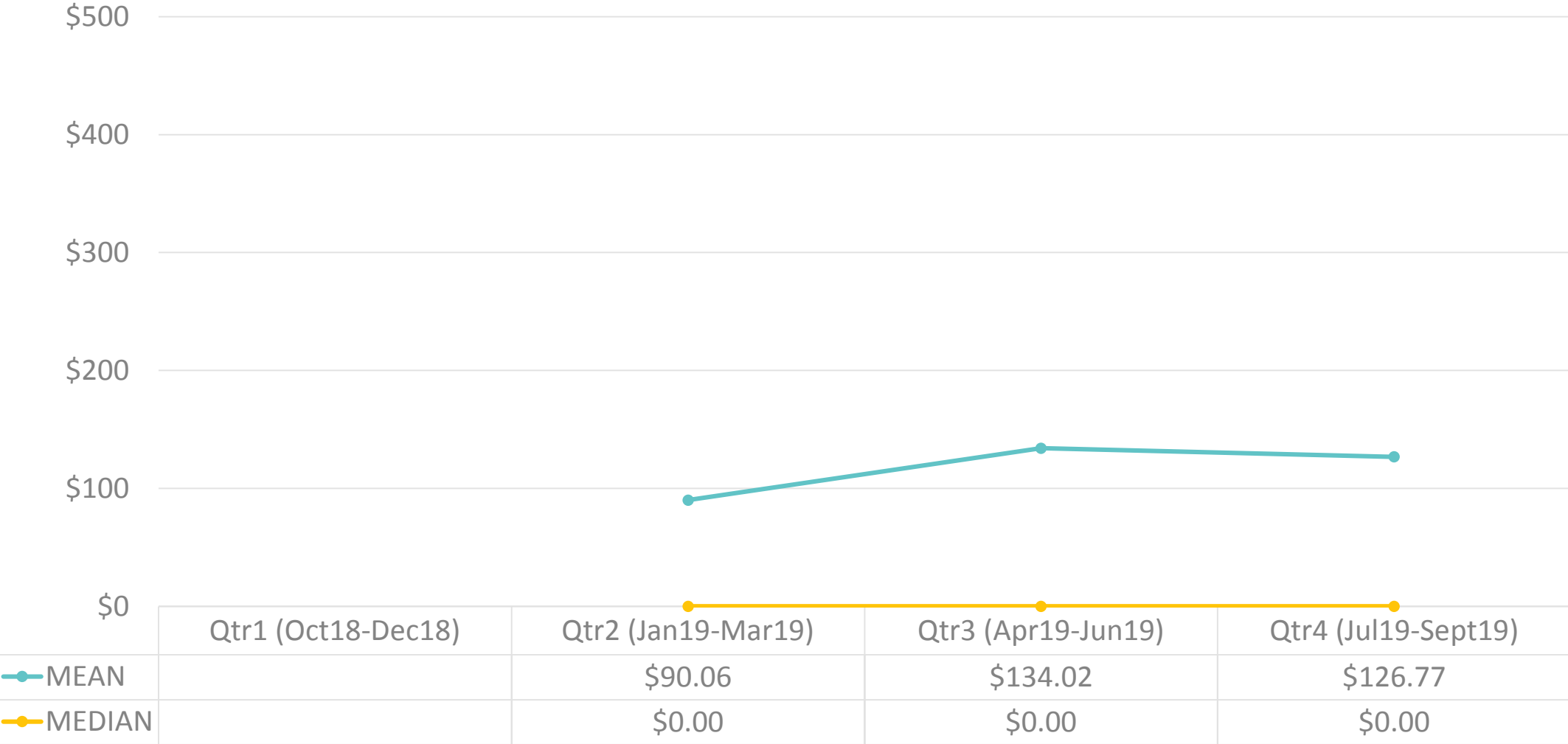
# ONISLE – TOTAL FOOD & BEVERAGE TRACKING



# ONISLE – ENTERTAINMENT & RECREATION



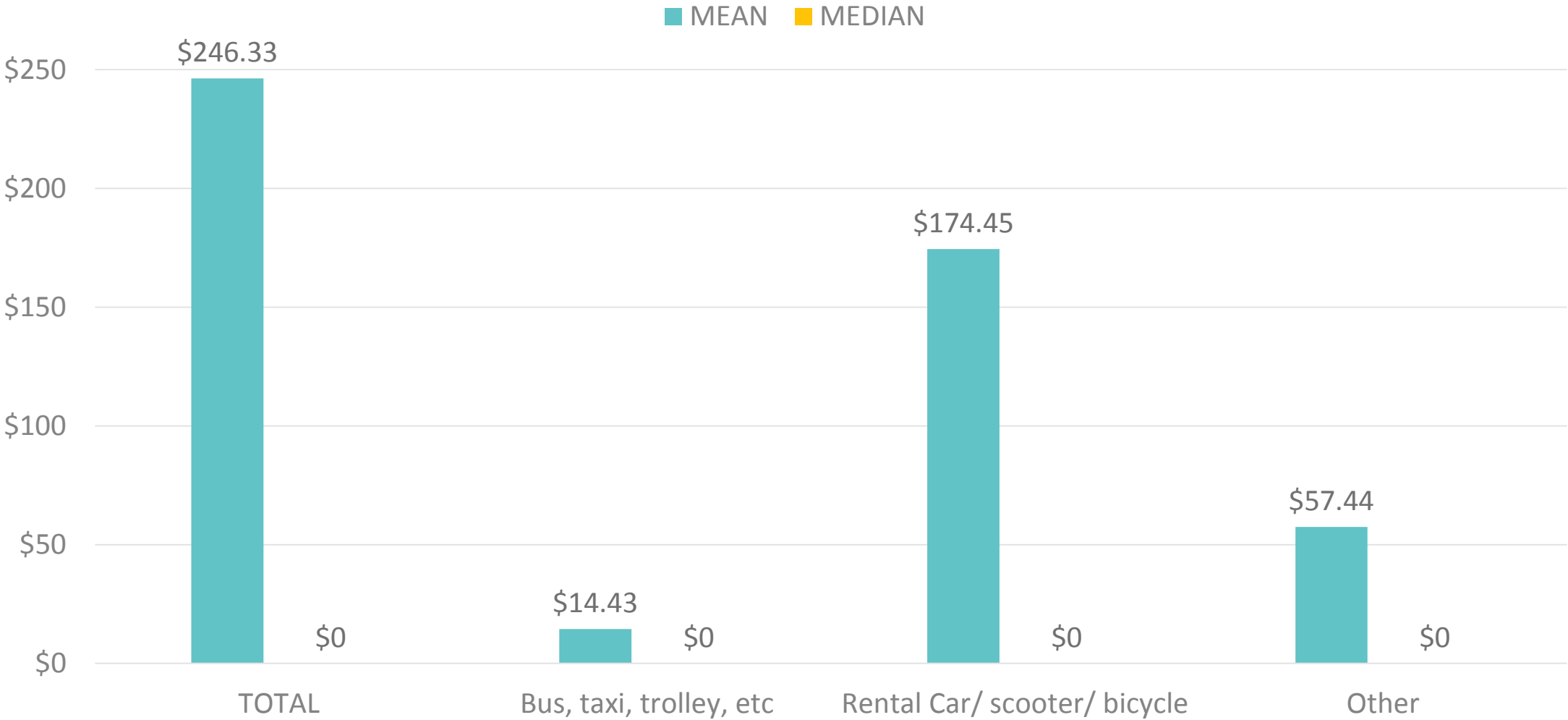
# ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING



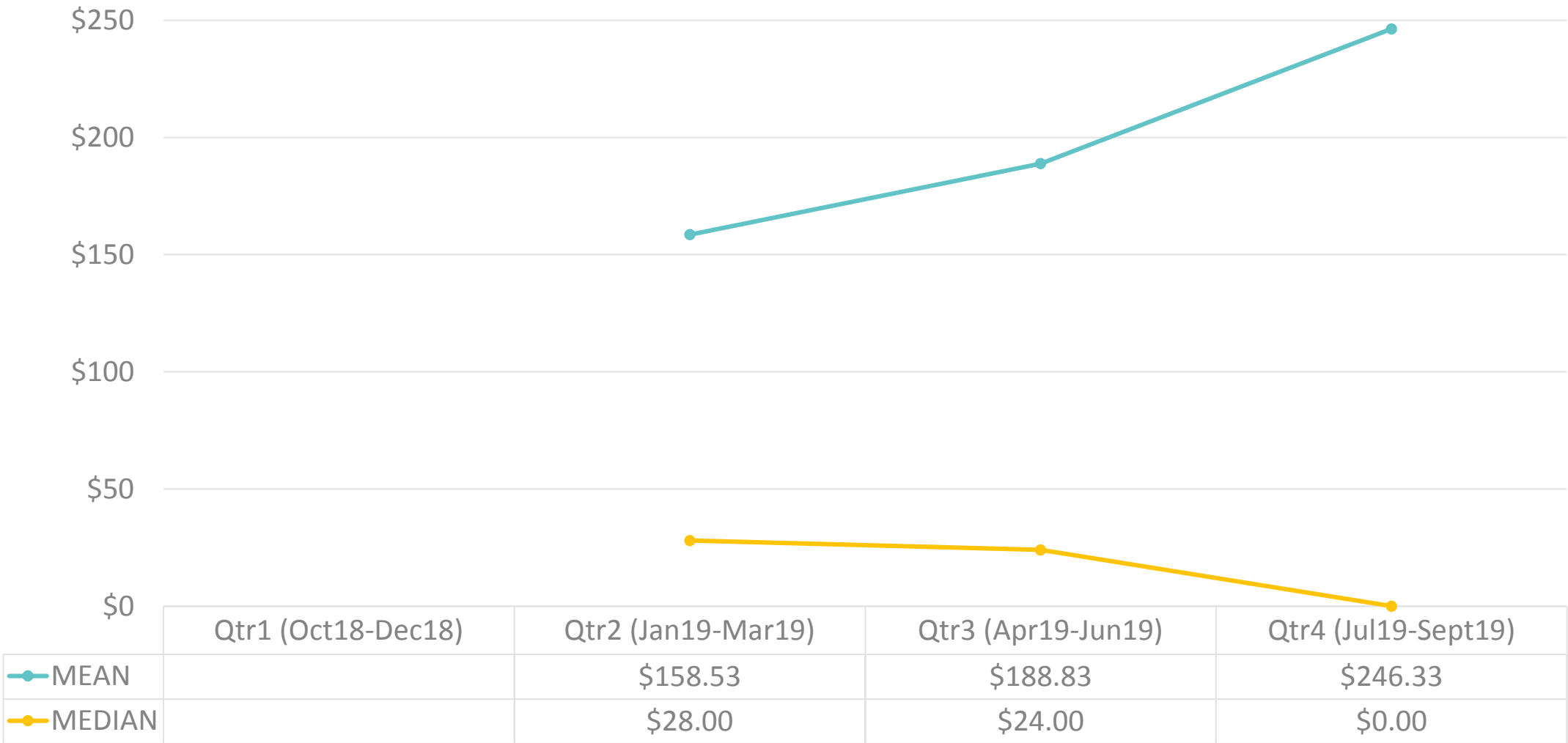
[A]



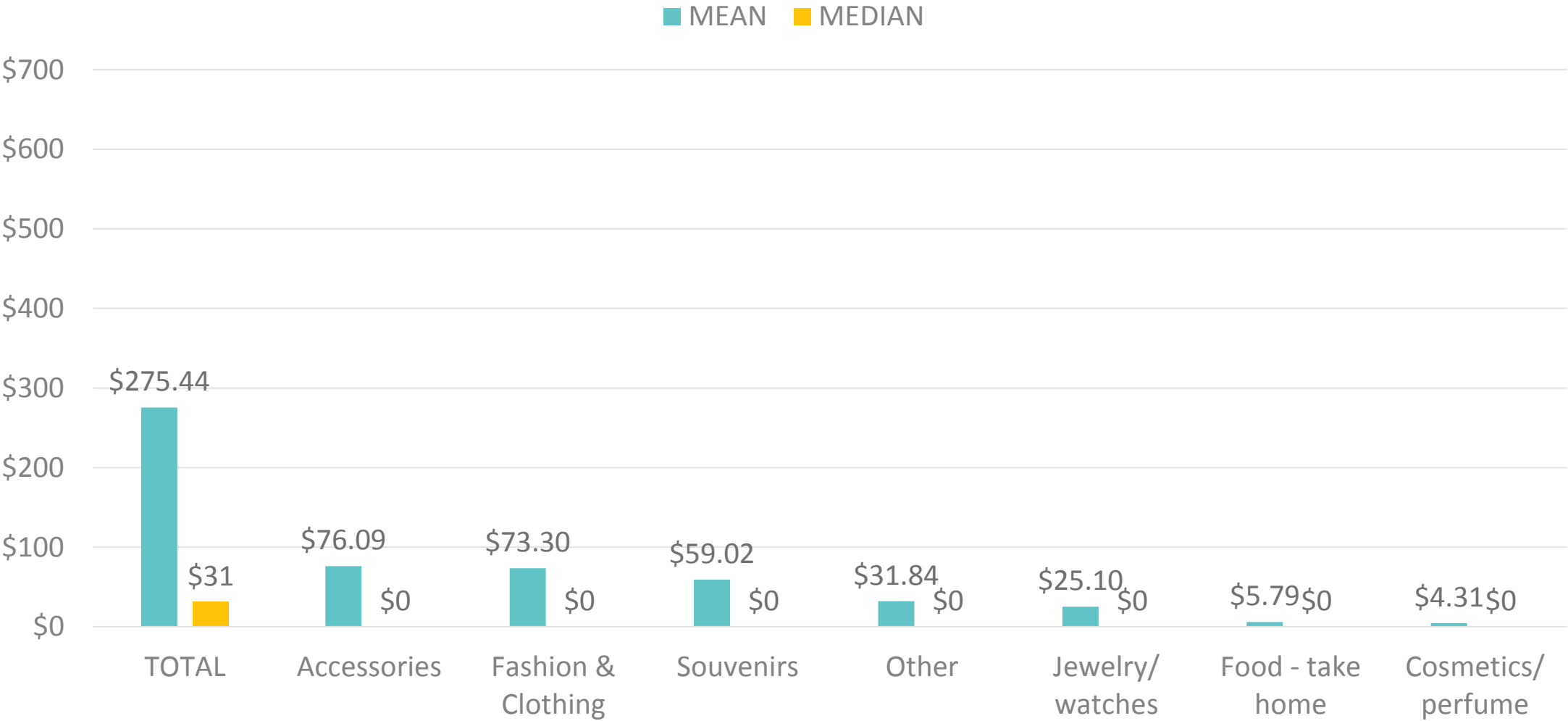
# ONISLE – TRANSPORTATION



# ONISLE – TOTAL TRANSPORTATION TRACKING

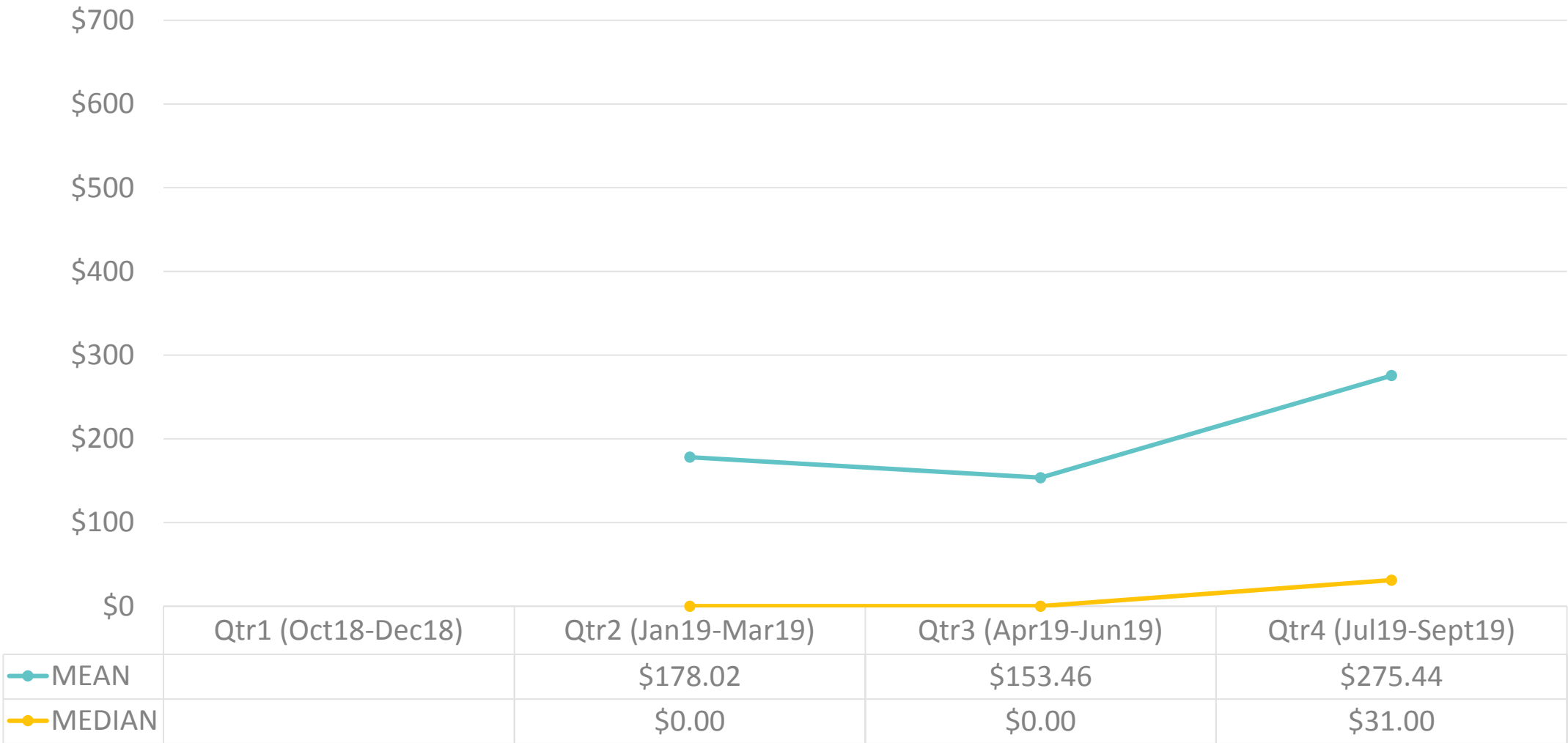


# ONISLE – SHOPPING

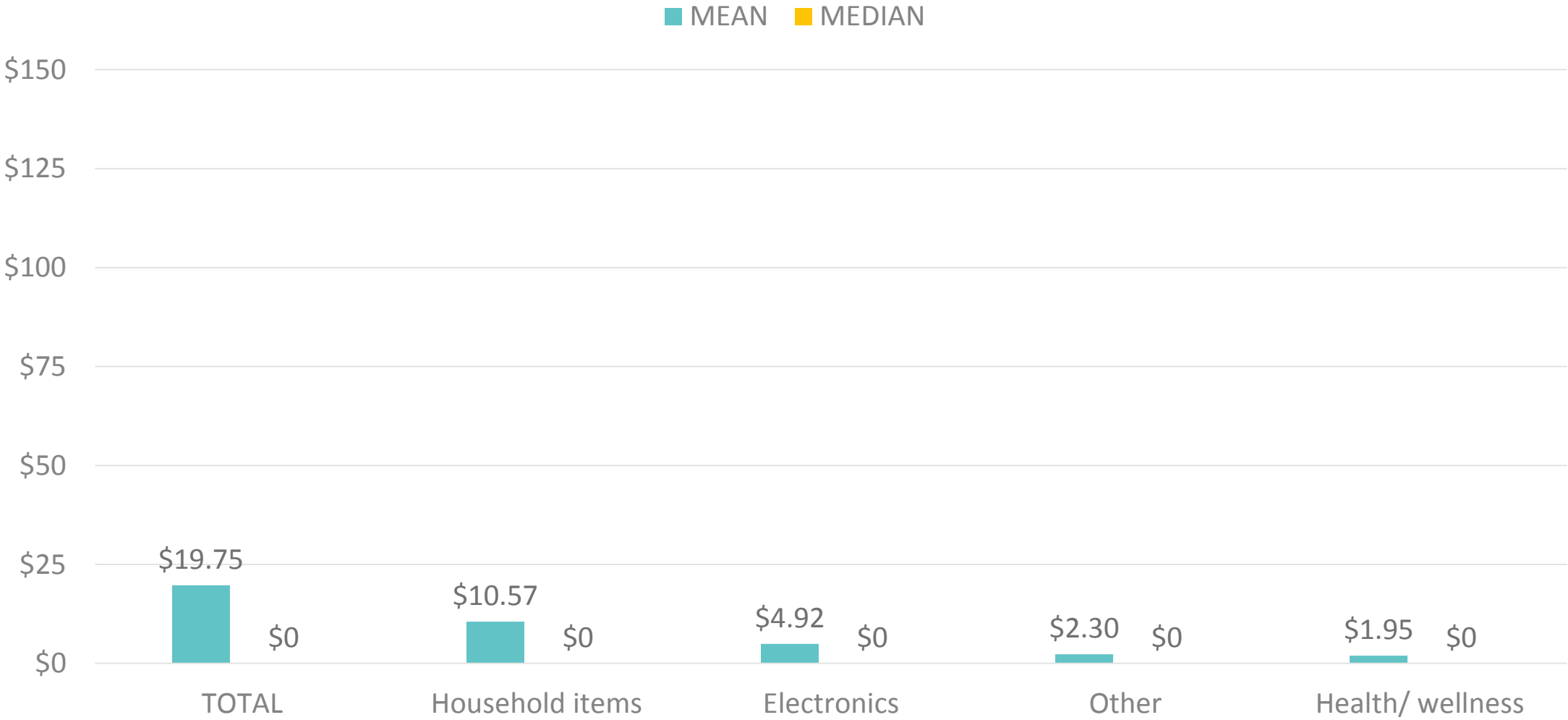




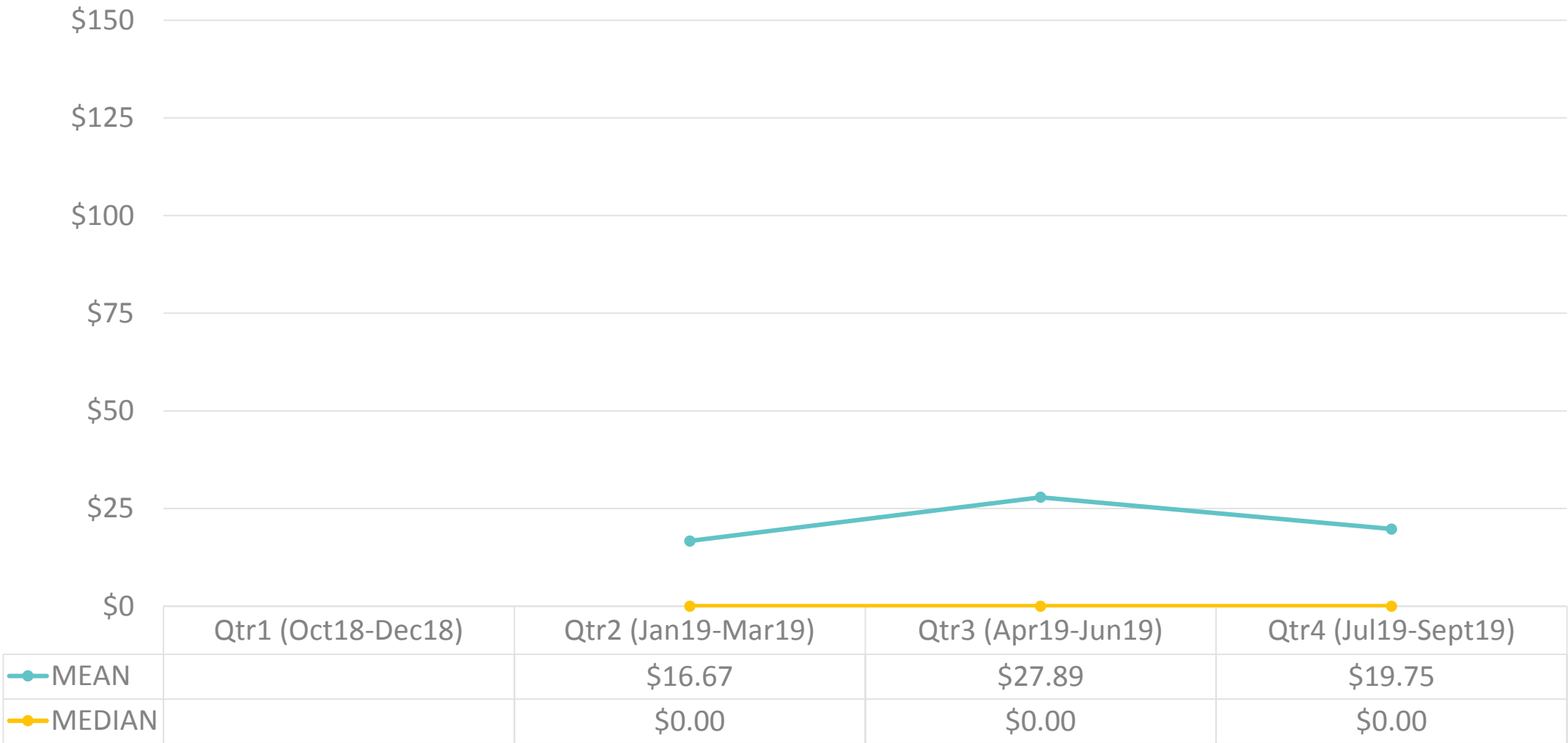
# ONISLE – TOTAL SHOPPING TRACKING



# ONISLE – MISCELLANEOUS



# ONISLE – MISCELLANEOUS TRACKING



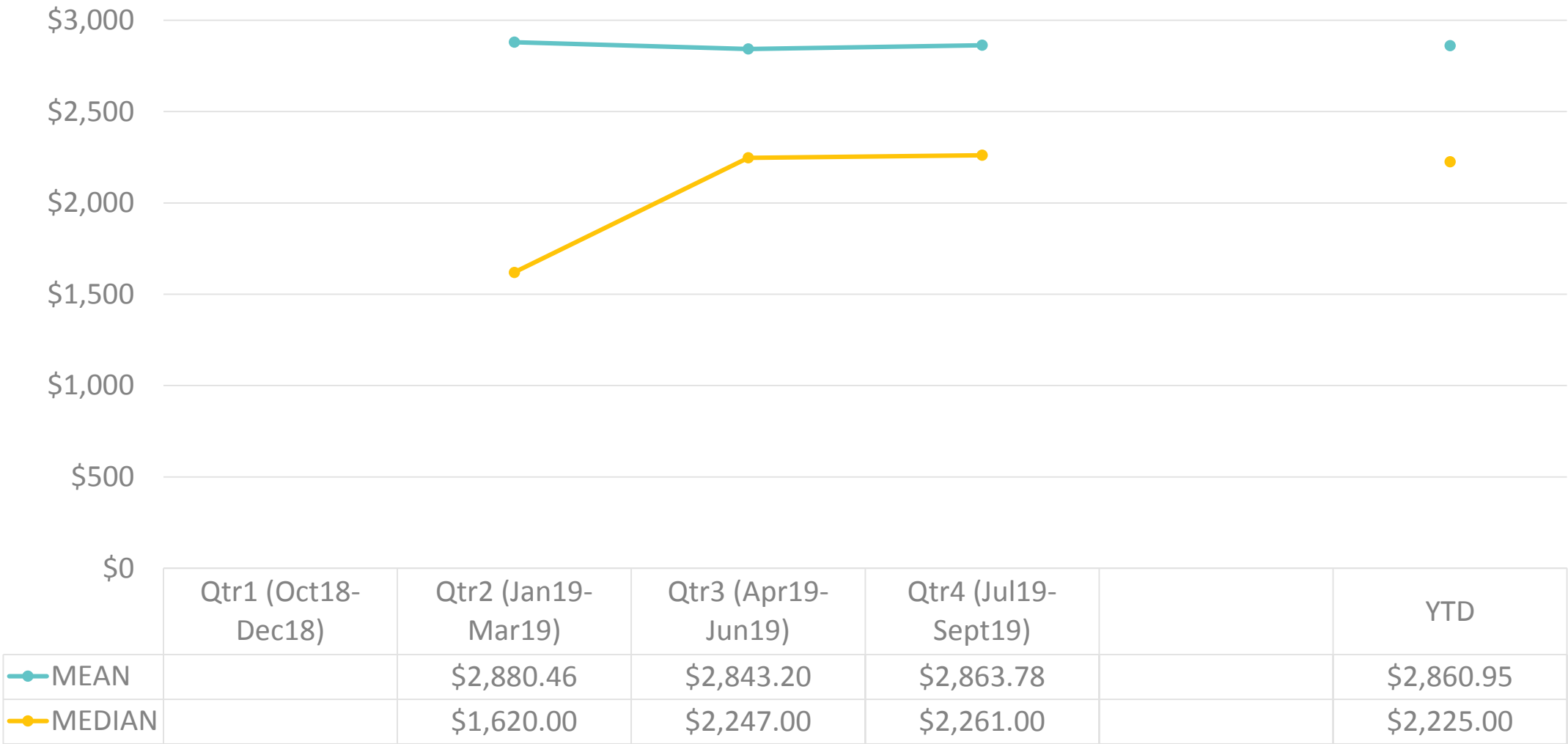
[A]



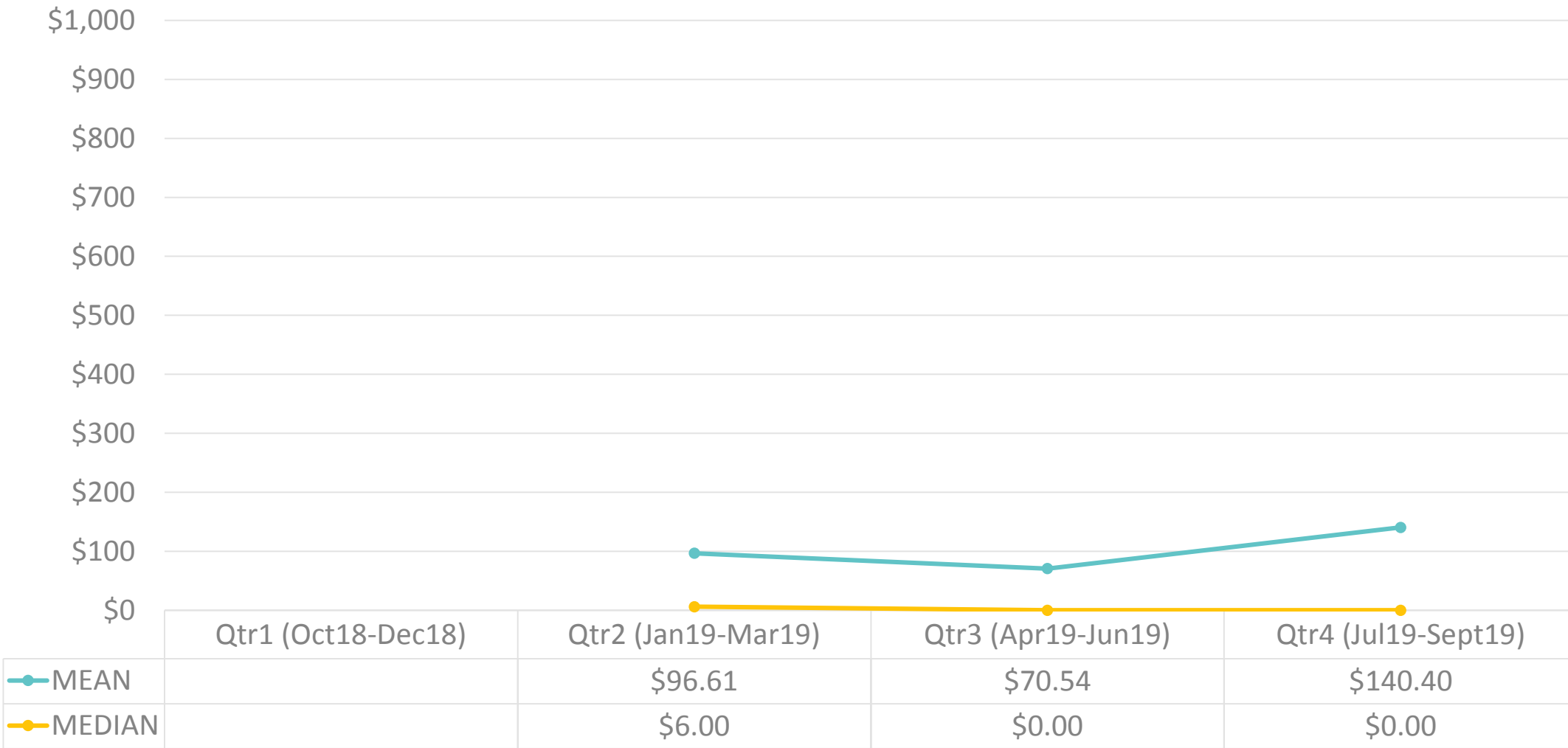
# TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

- \$2,863.78 = Mean average per person
- \$2,261.00 = Median amount spent per person

# TOTAL EXPENDITURES PER PERSON TRACKING



# GUAM AIRPORT EXPENDITURE TRACKING



[A]



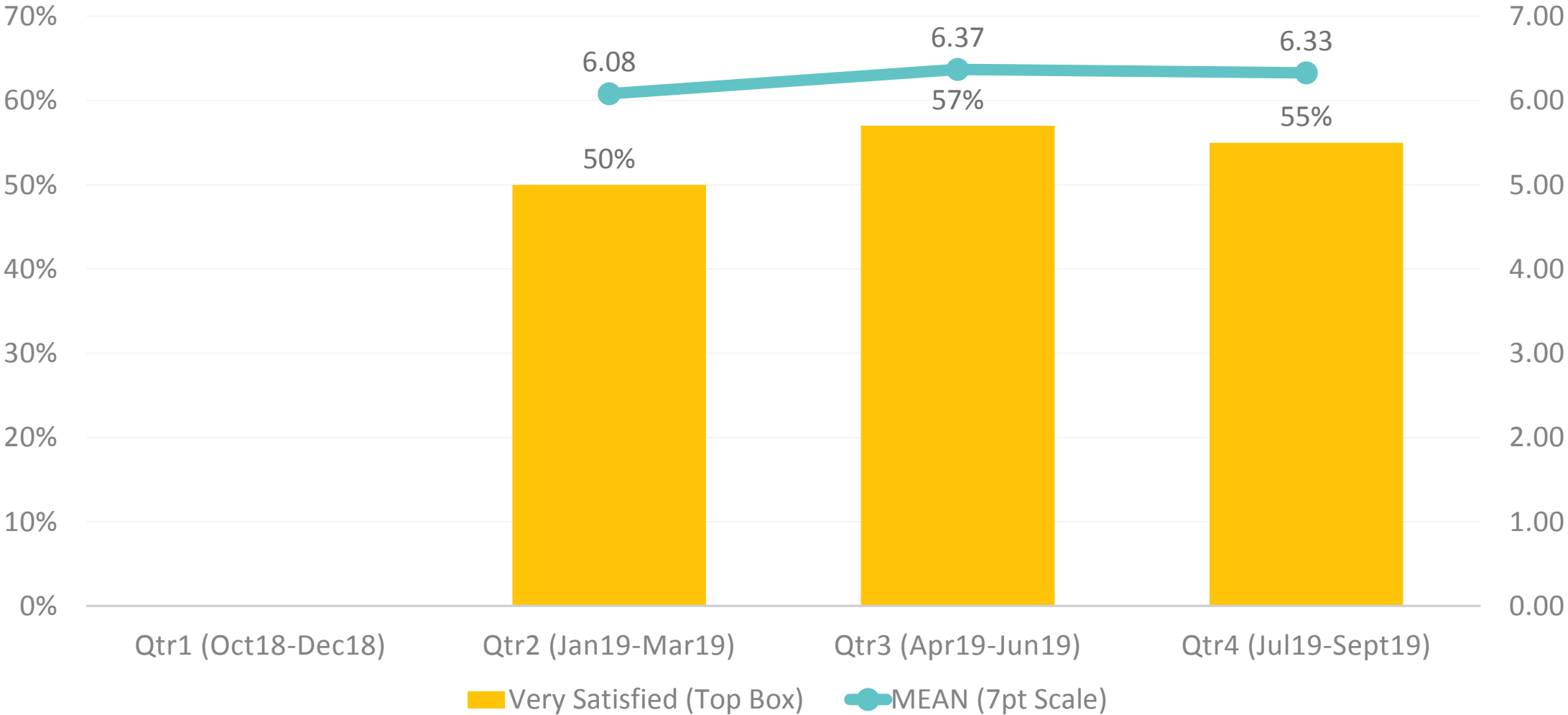


SECTION 4

# VISITOR SATISFACTION

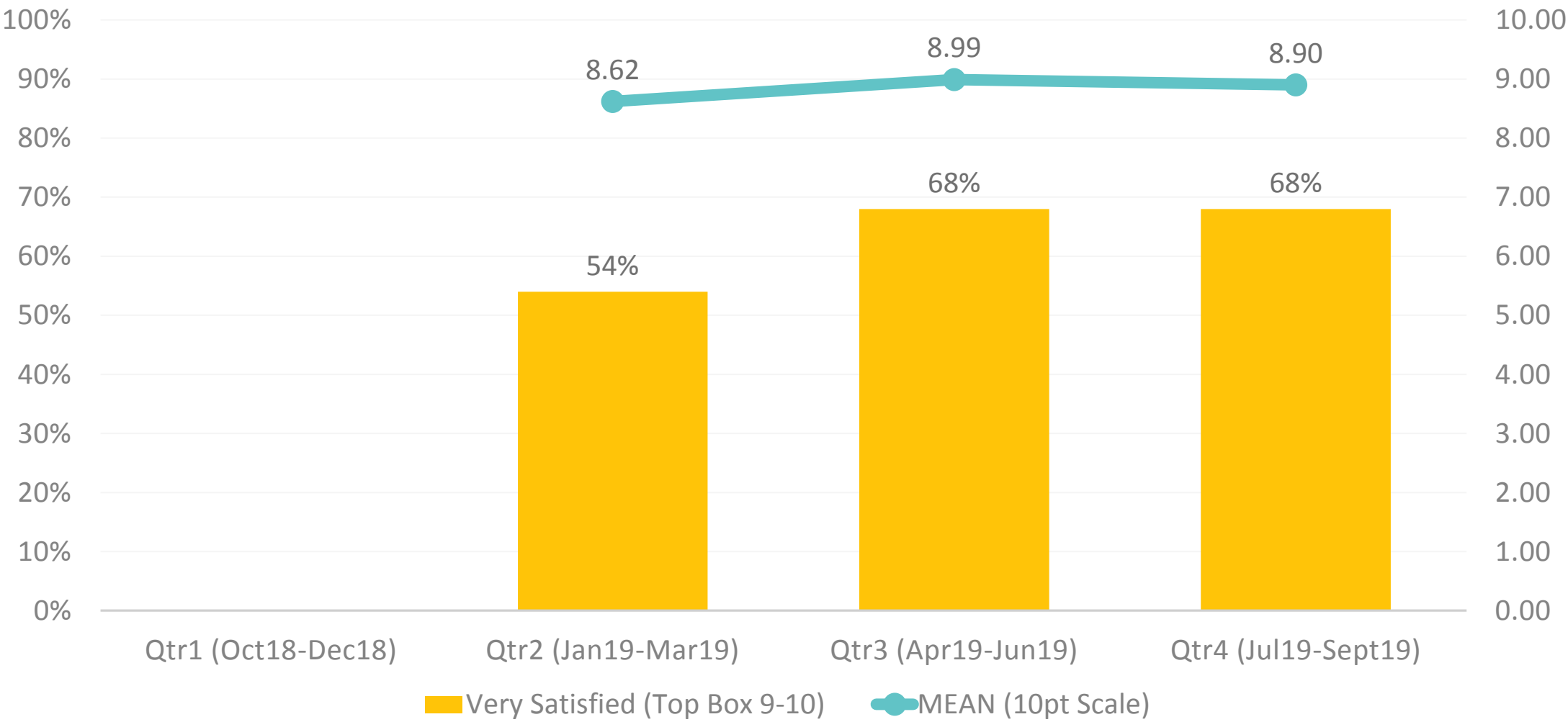


# OVERALL SATISFACTION – 7PT SCALE

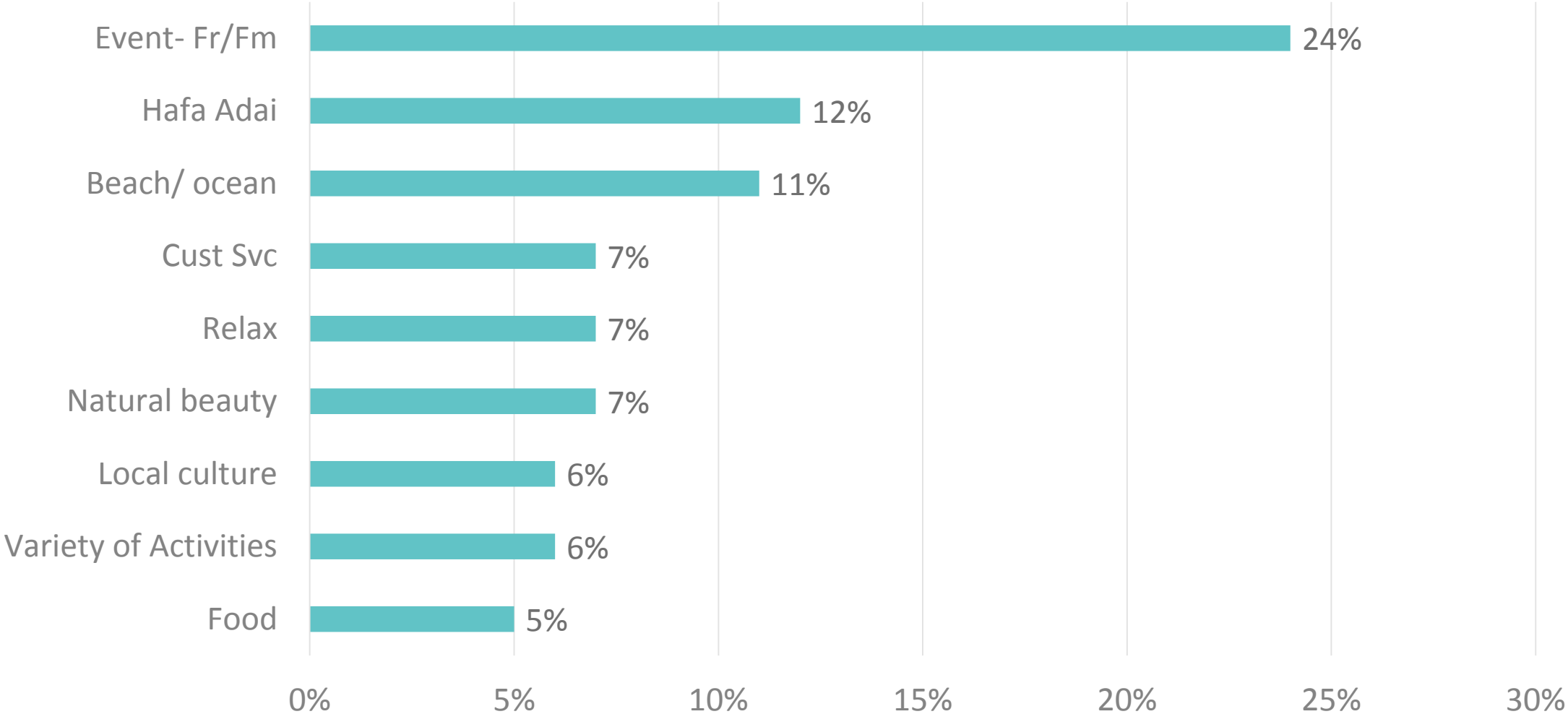




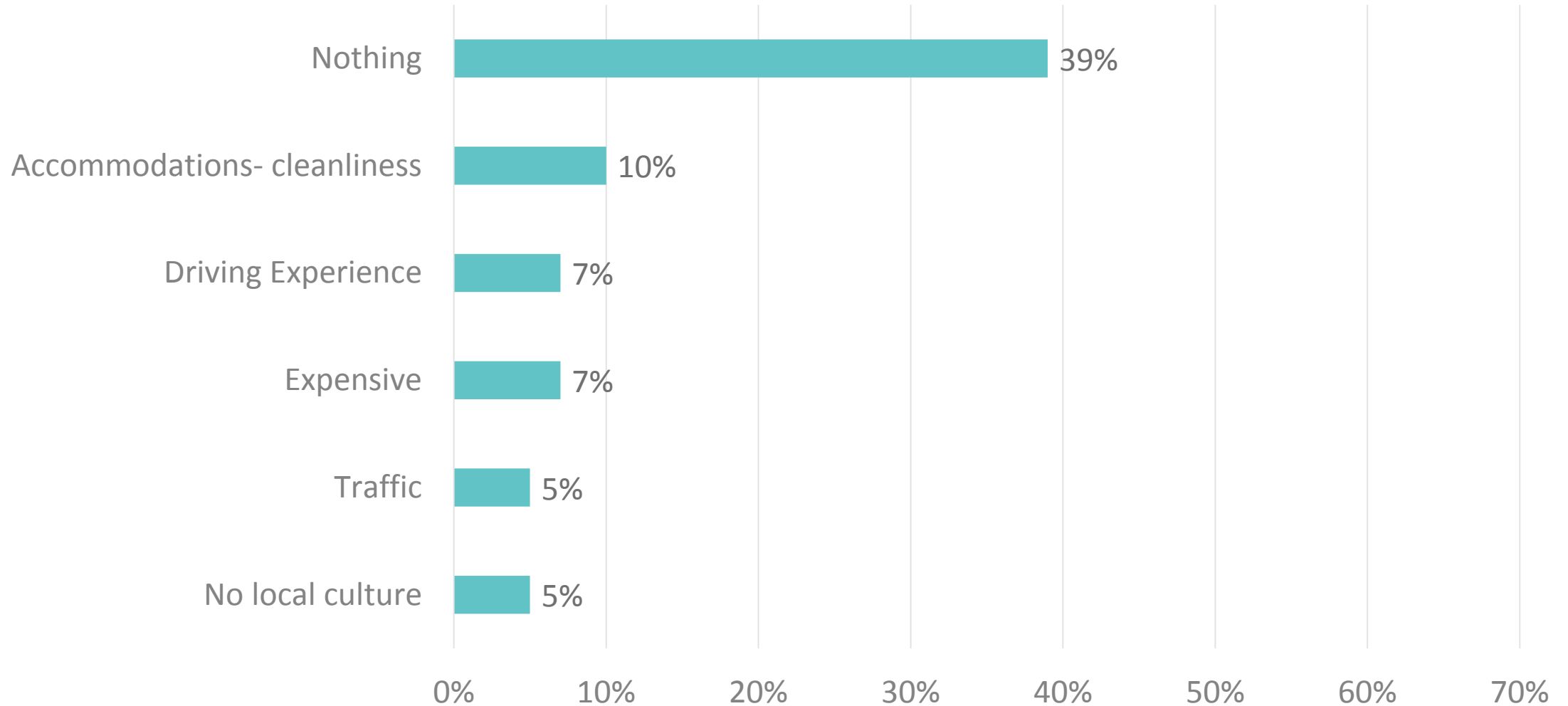
# OVERALL SATISFACTION – 10PT SCALE



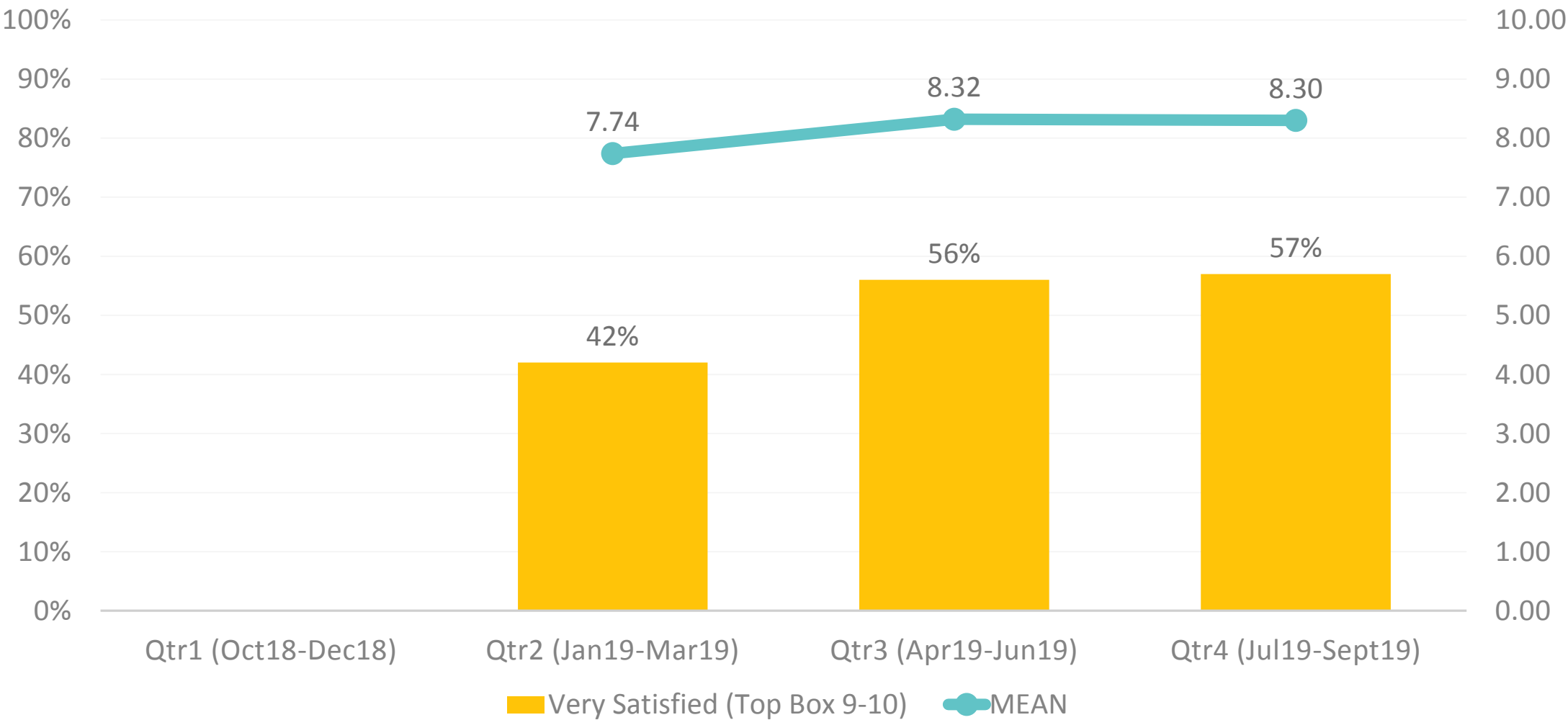
# SWOT – POSITIVE ASPECT OF TRIP



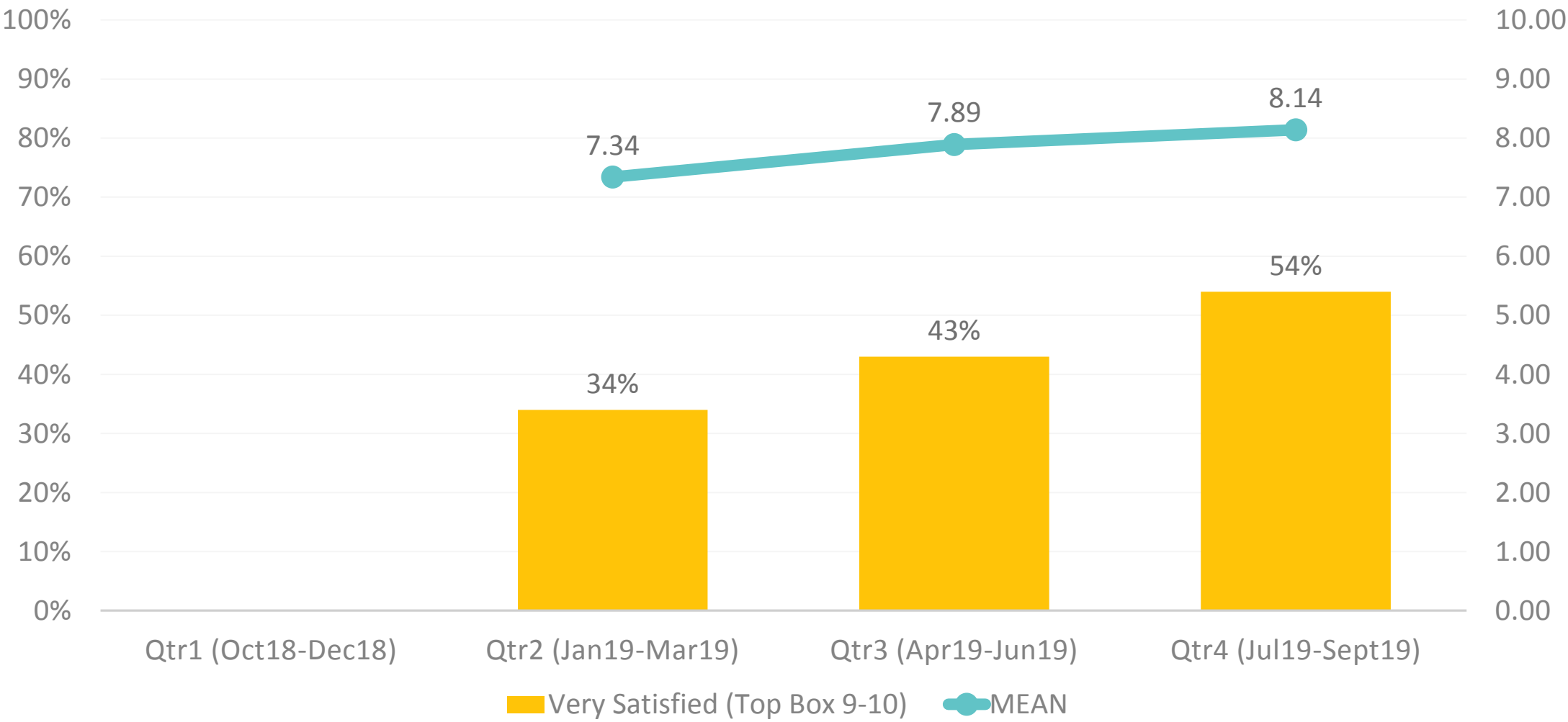
# SWOT – NEGATIVE ASPECT OF TRIP



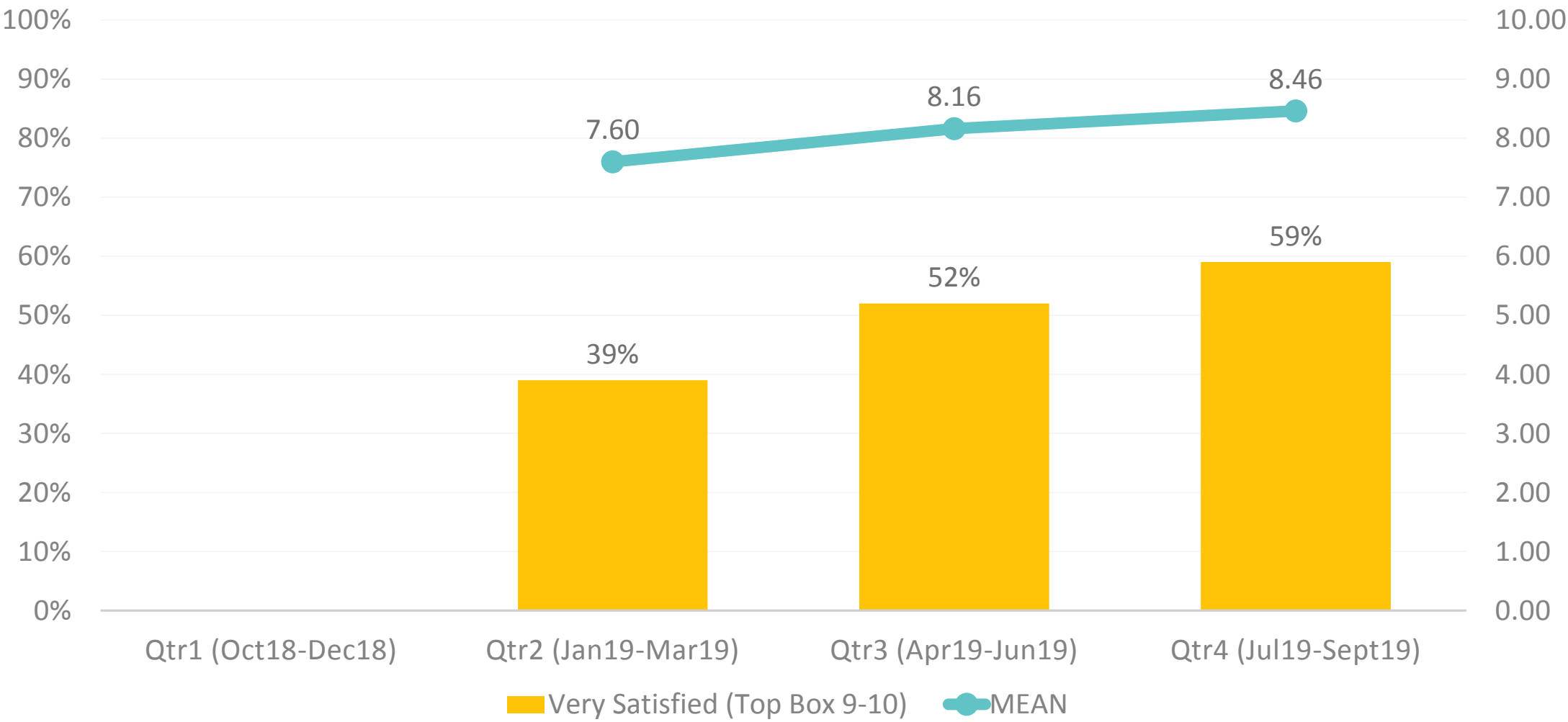
# SATISFACTION – ENTERTAINMENT



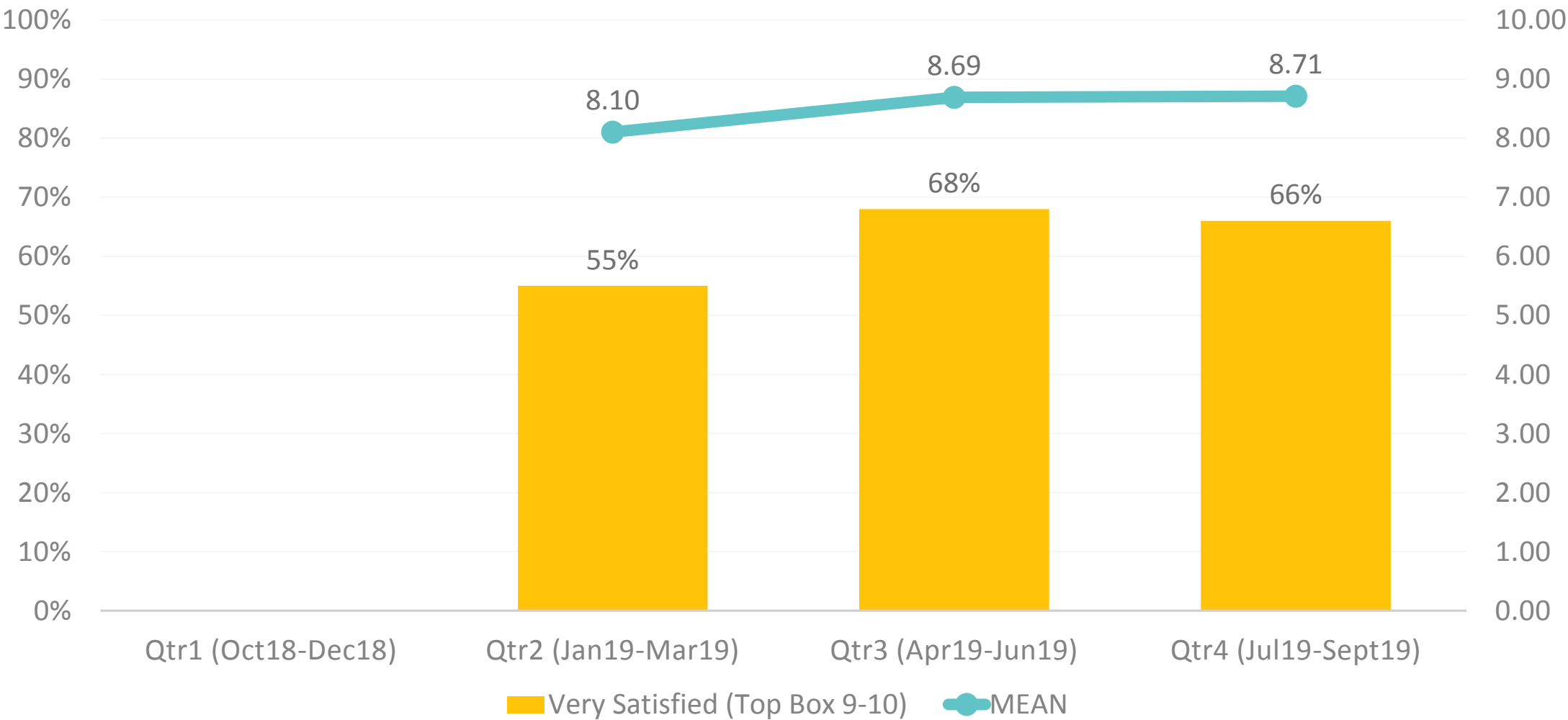
# SATISFACTION – SHOPPING



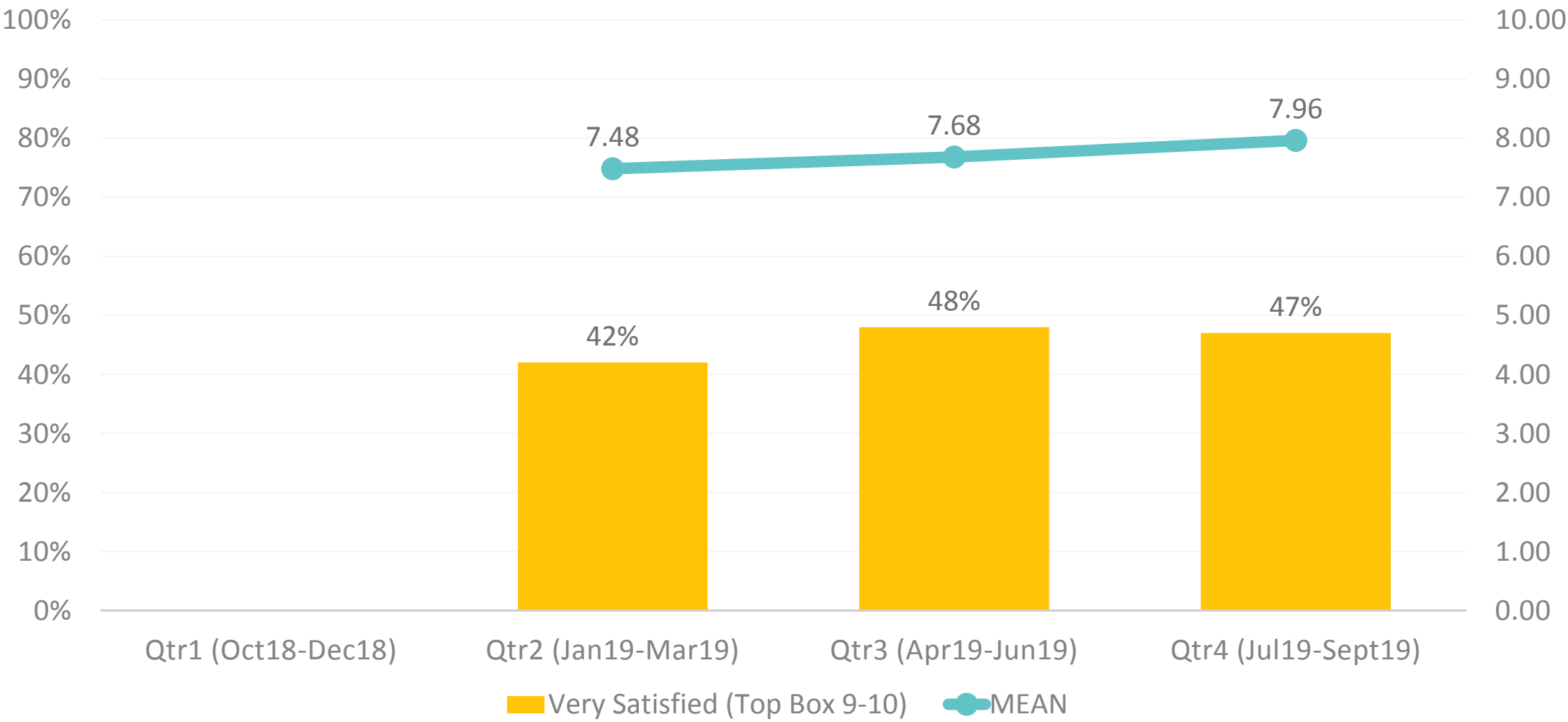
# SATISFACTION – DINING



# SATISFACTION – BEACHES

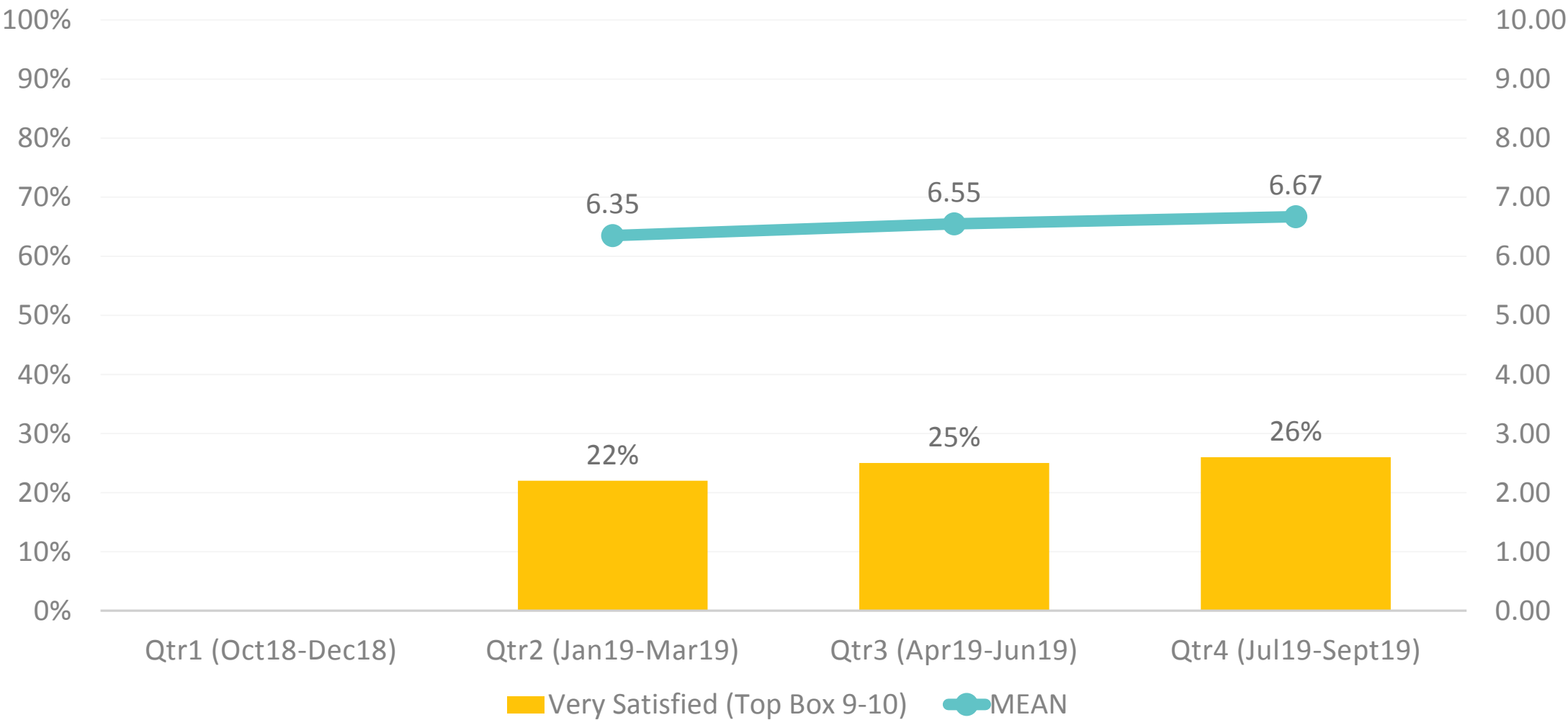


# SATISFACTION – PARKS

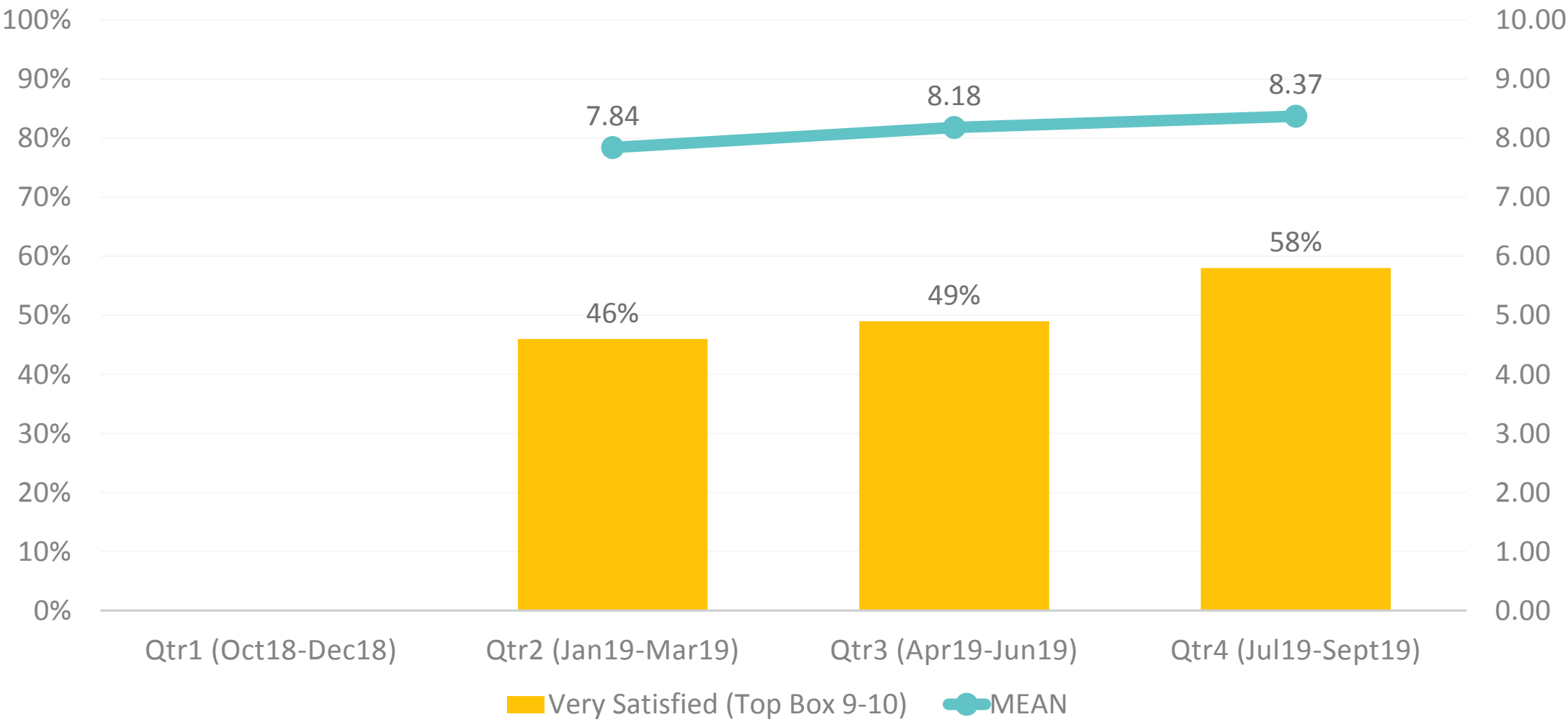




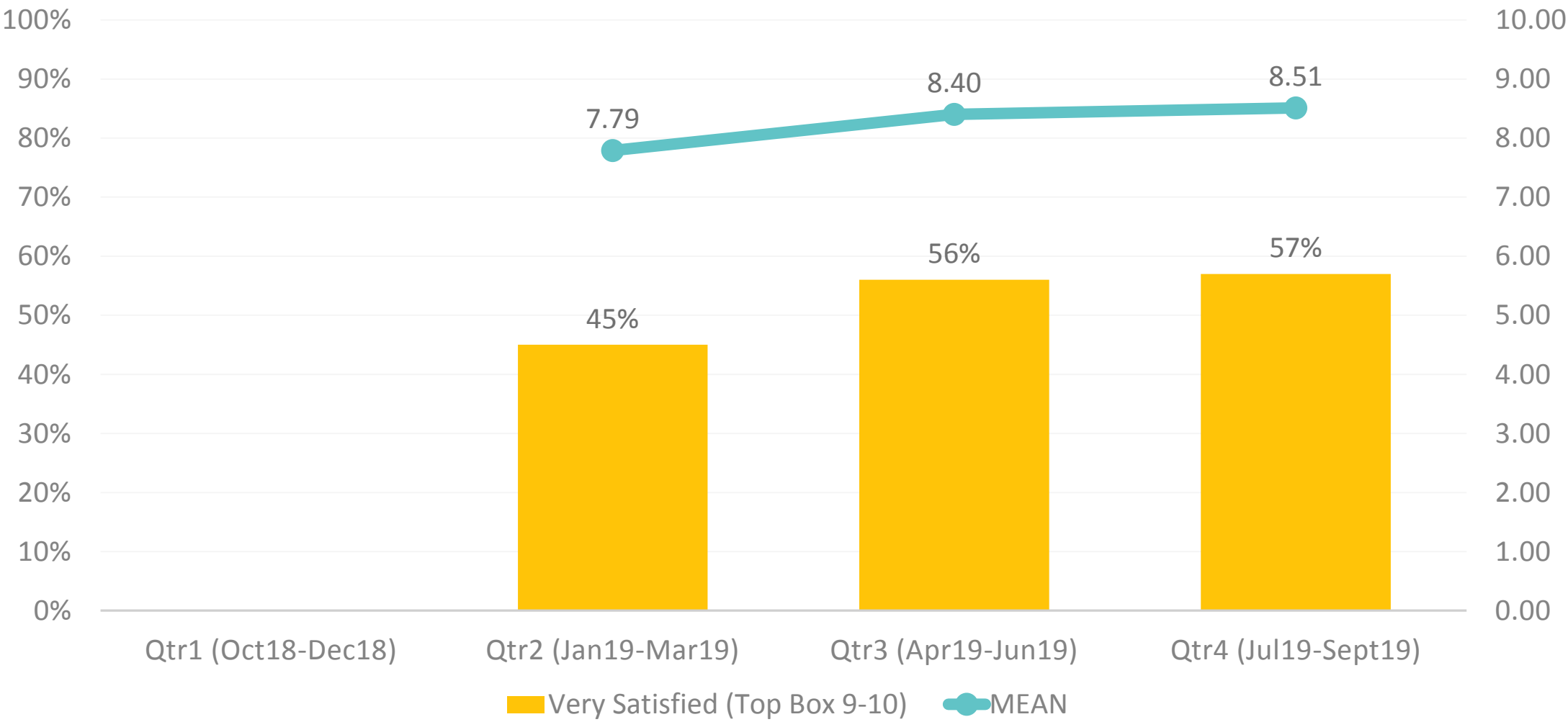
# SATISFACTION – ROADS



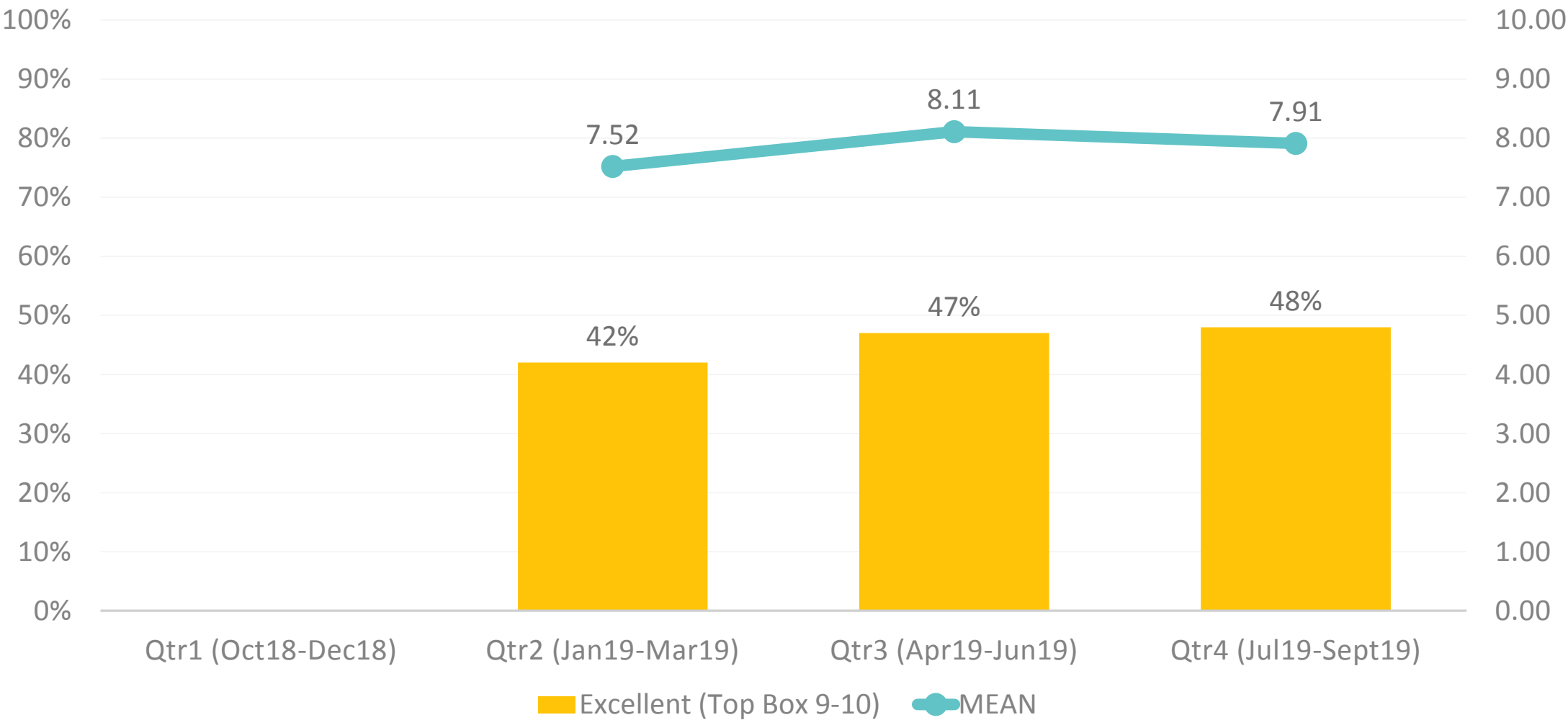
# SATISFACTION – SIGHTSEEING AREAS



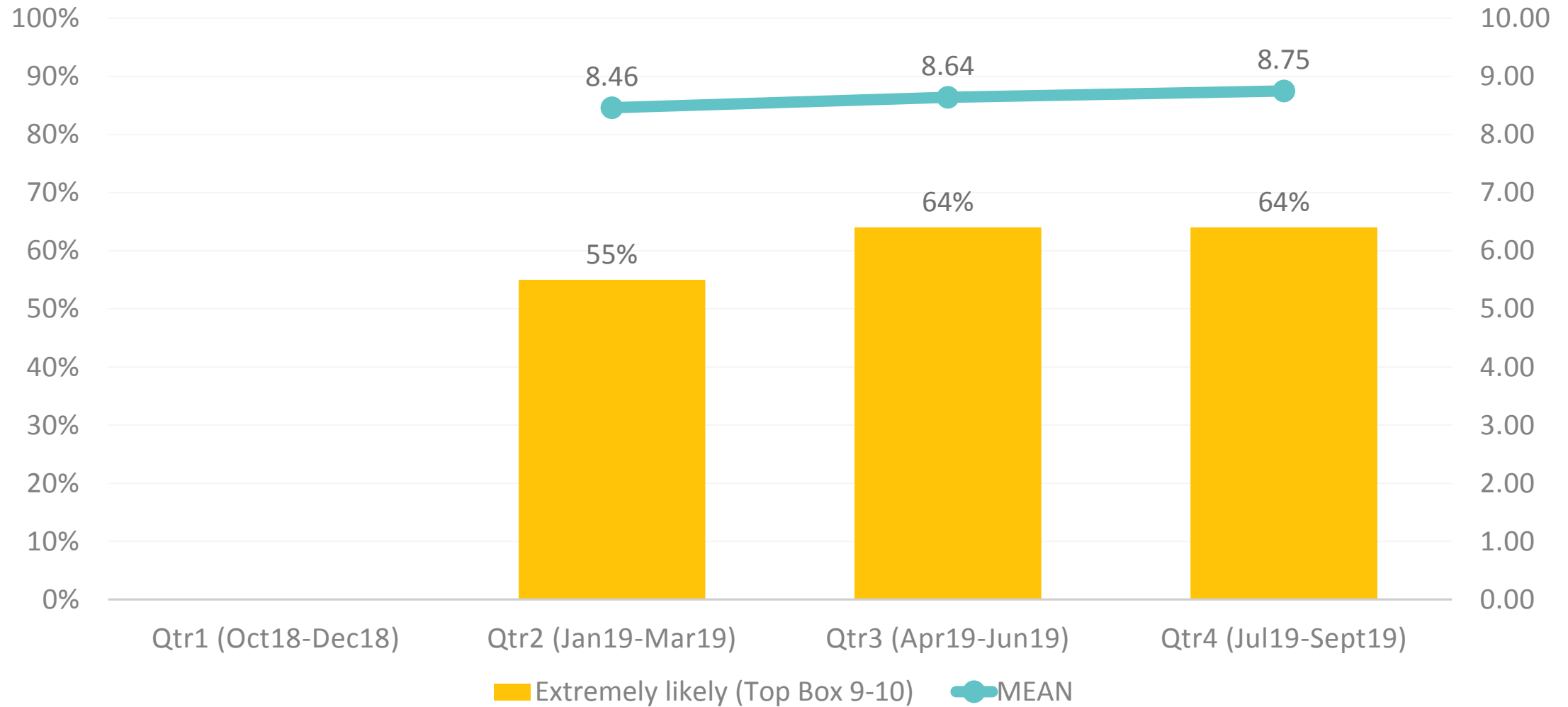
# SATISFACTION – SAFETY & SECURITY



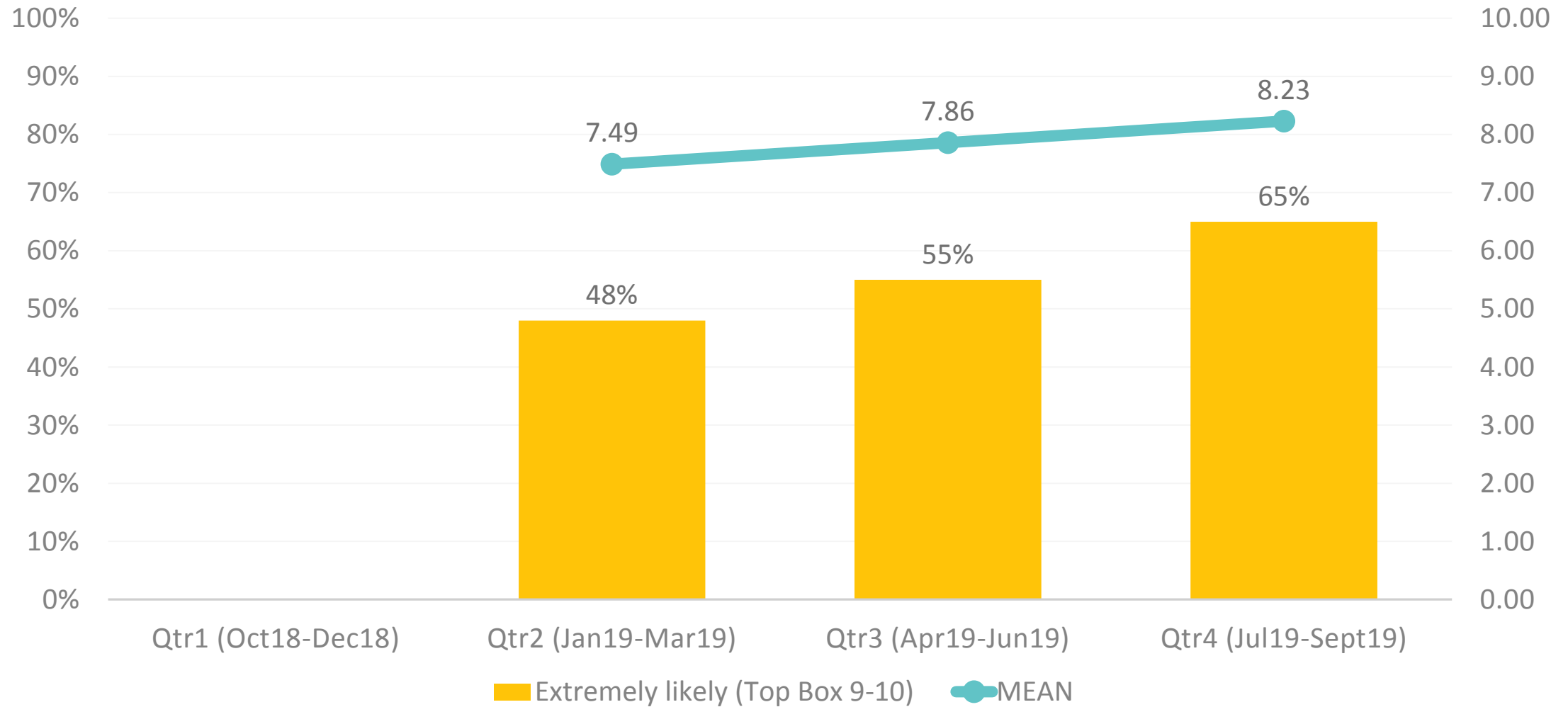
# SATISFACTION – ACCOMMODATIONS



# BRAND ADVOCACY



# BRAND LOYALTY

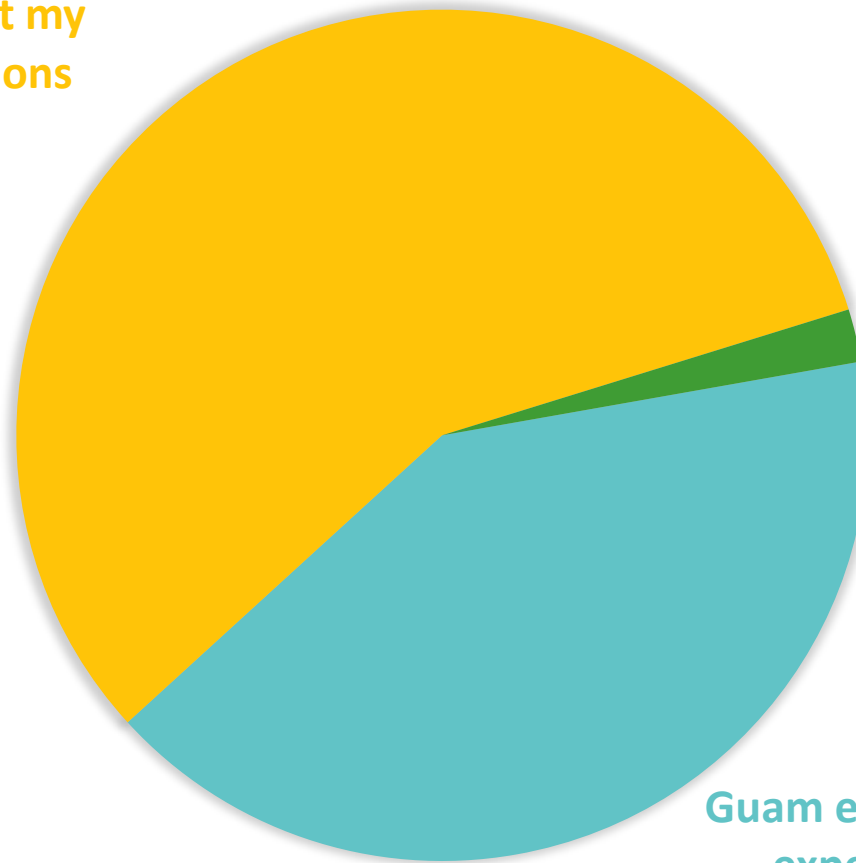


# TRIP EXPECTATIONS

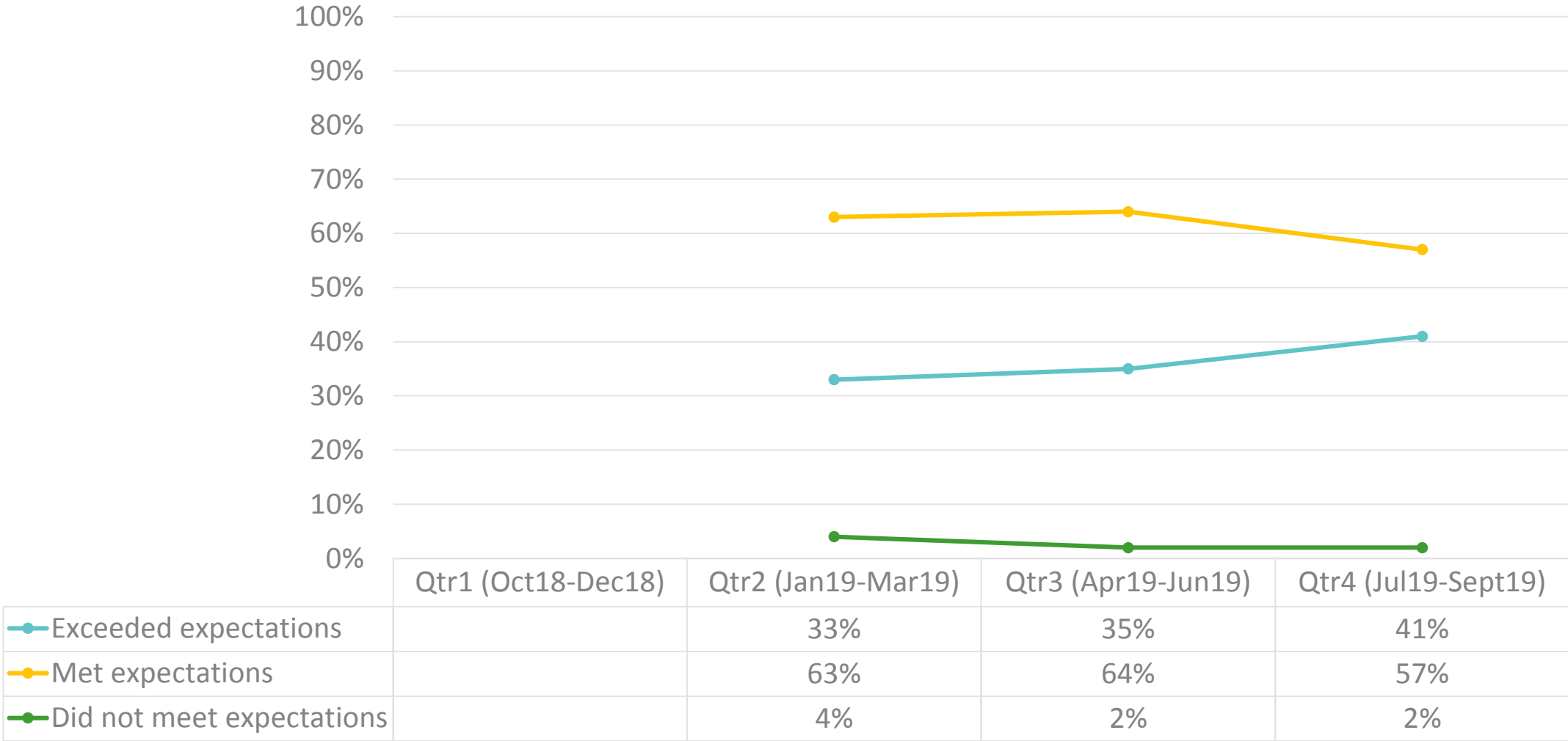
Guam met my  
expectations  
57%

Guam did not meet  
my expectations  
2%

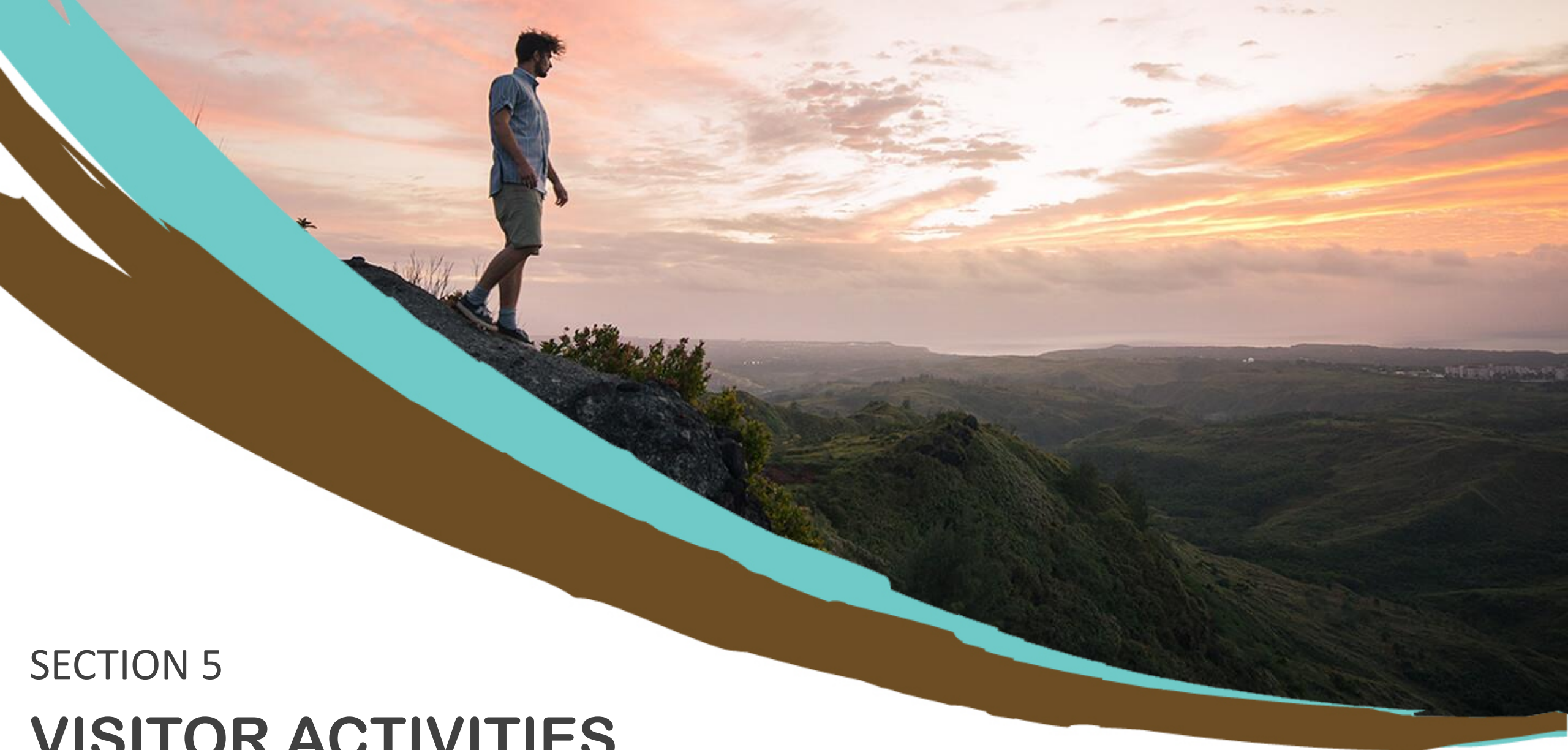
Guam exceeded my  
expectations  
41%



# TRIP EXPECTATIONS – TRACKING





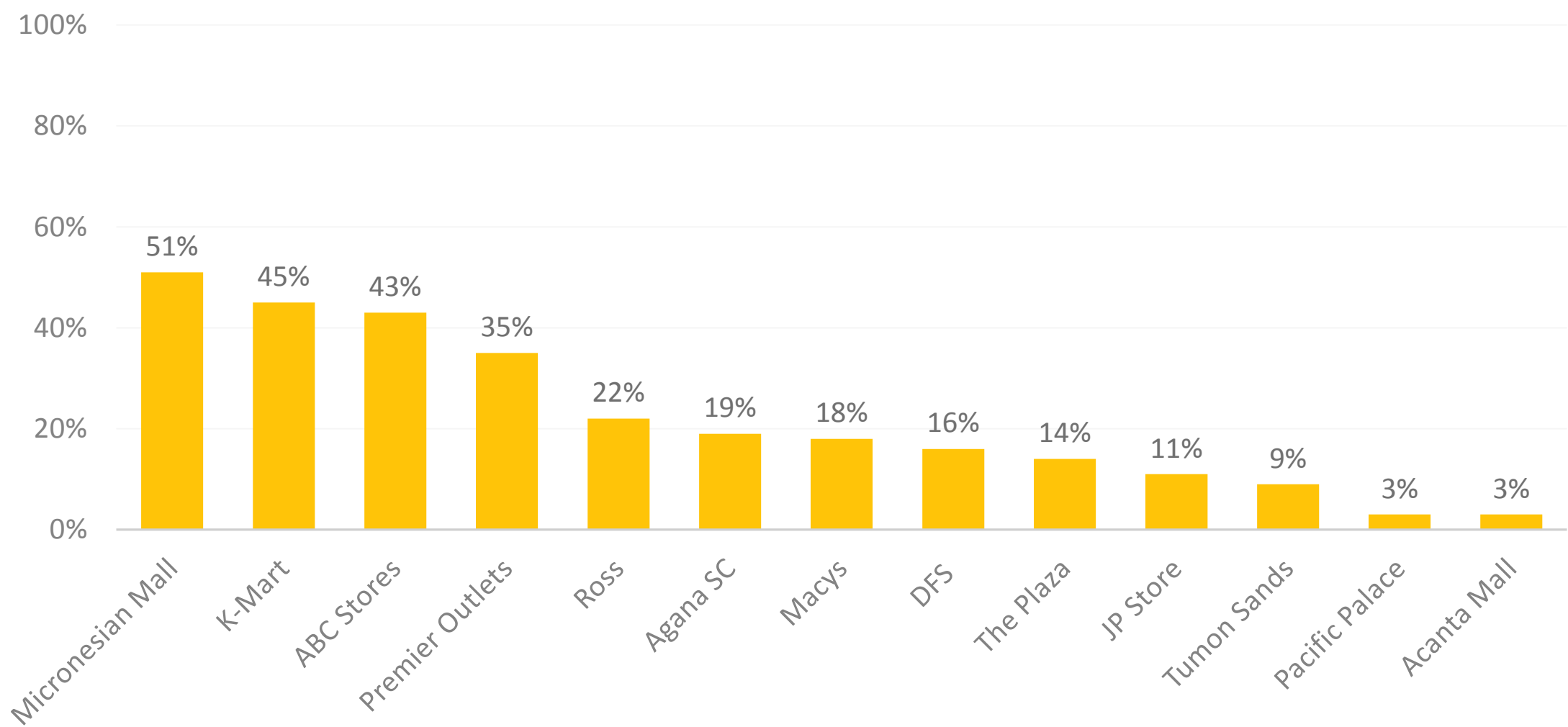


## SECTION 5

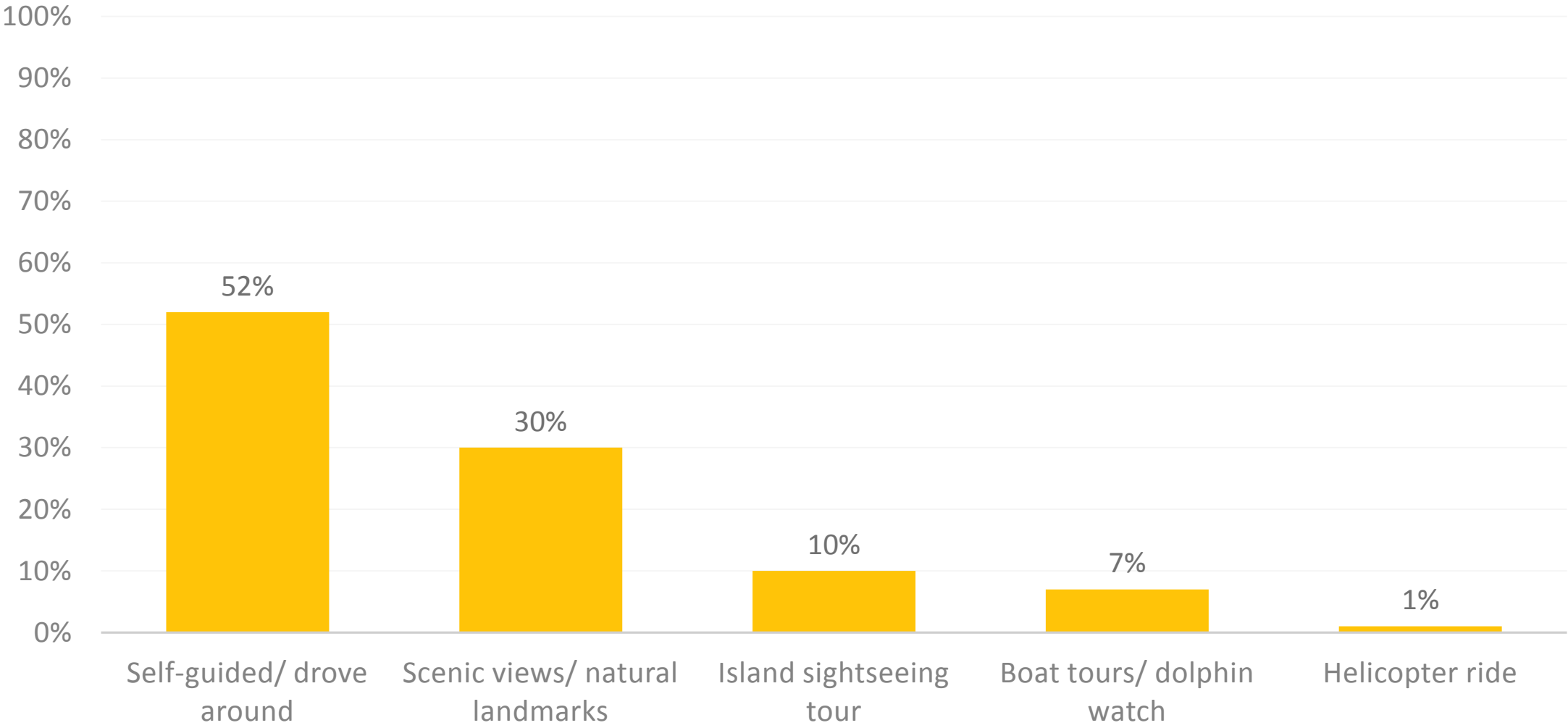
# VISITOR ACTIVITIES



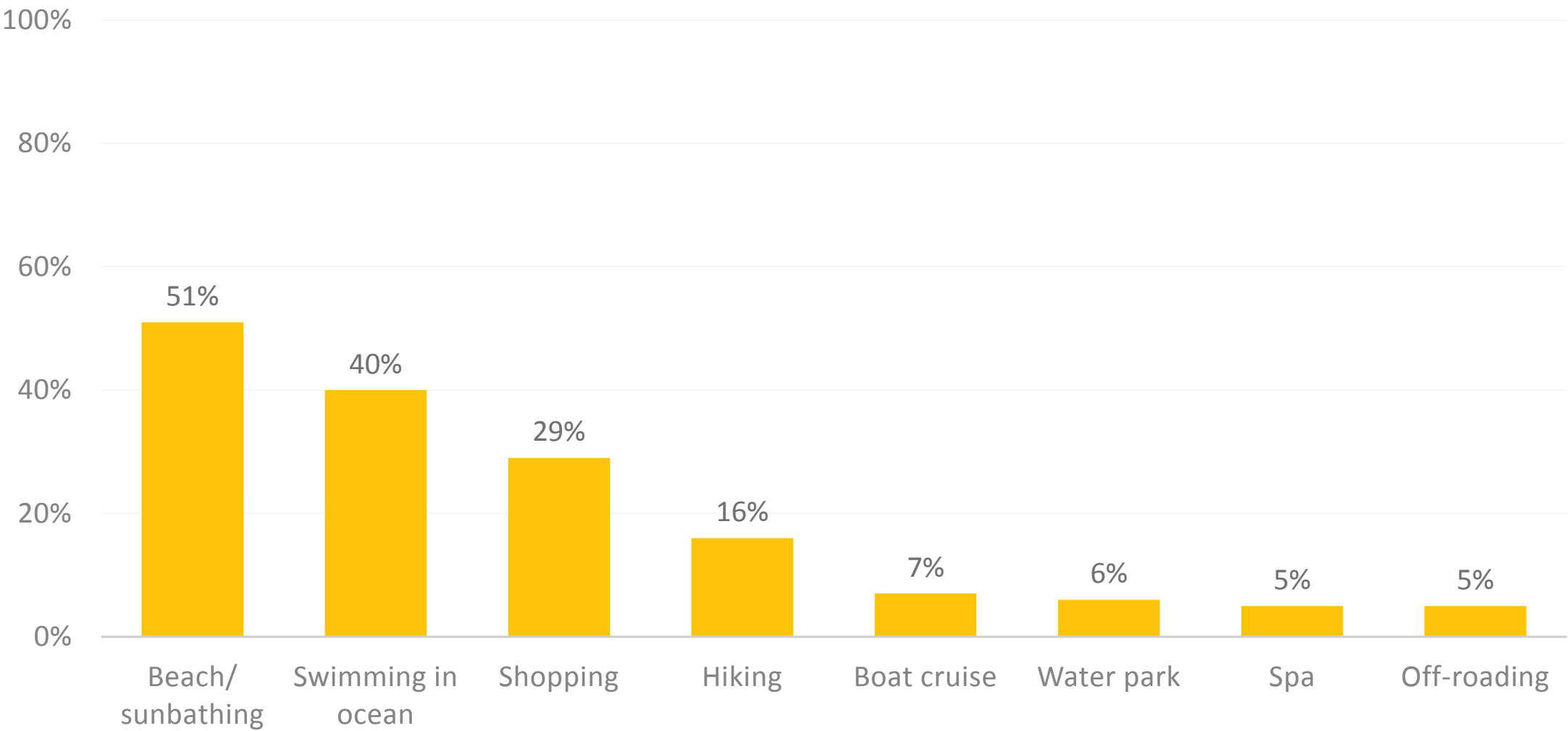
# SHOPPING AREAS – PENETRATION



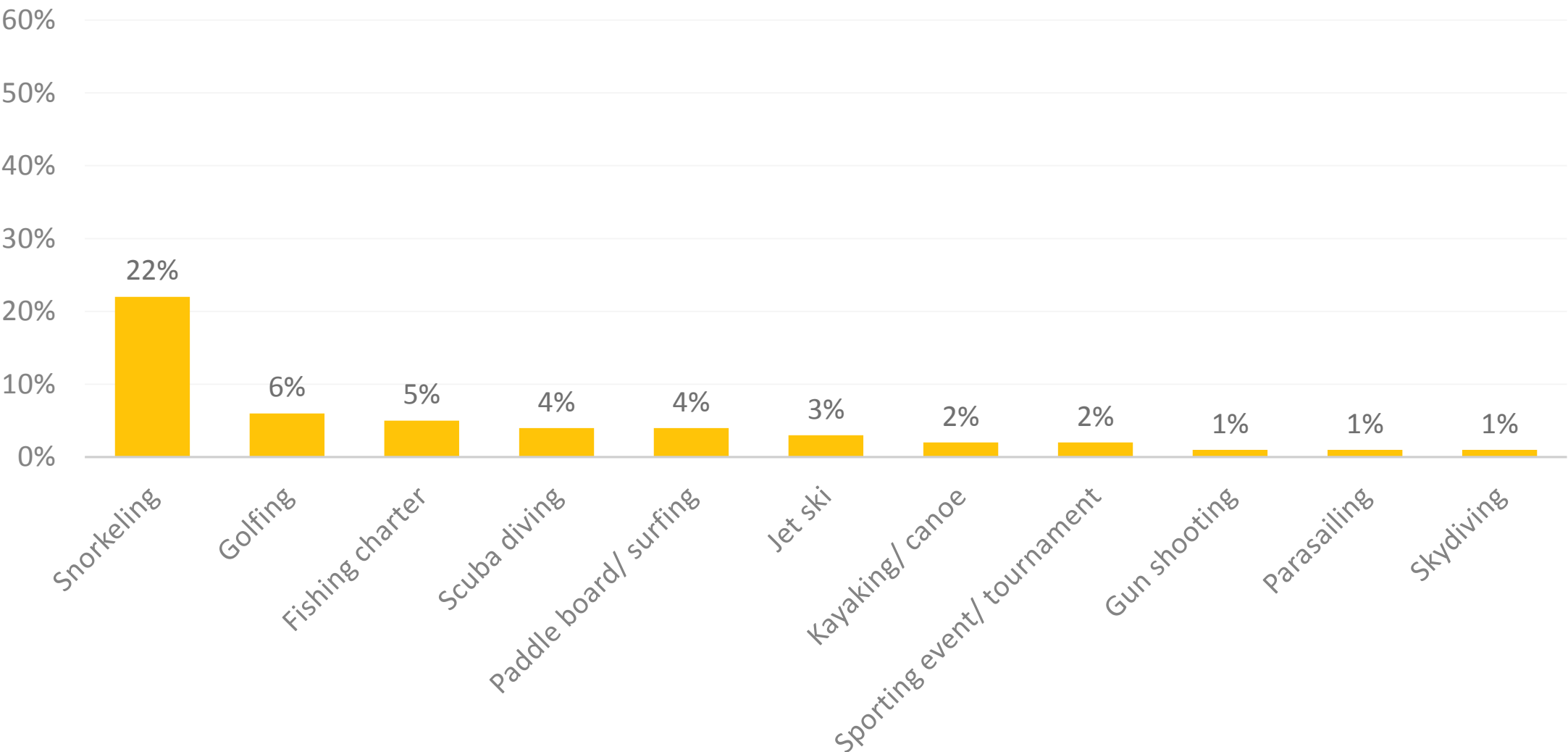
# ACTIVITIES – SIGHTSEEING



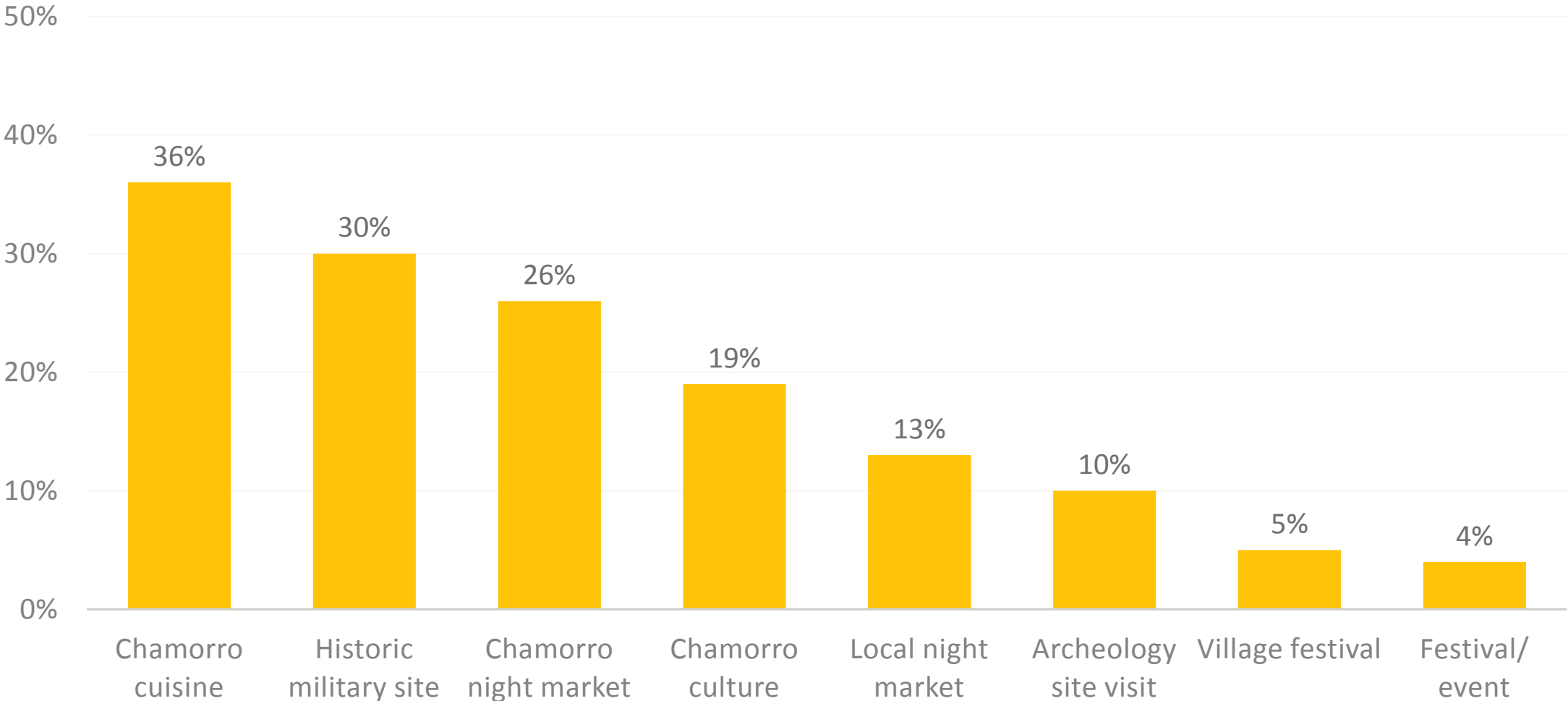
# ACTIVITIES – RECREATION



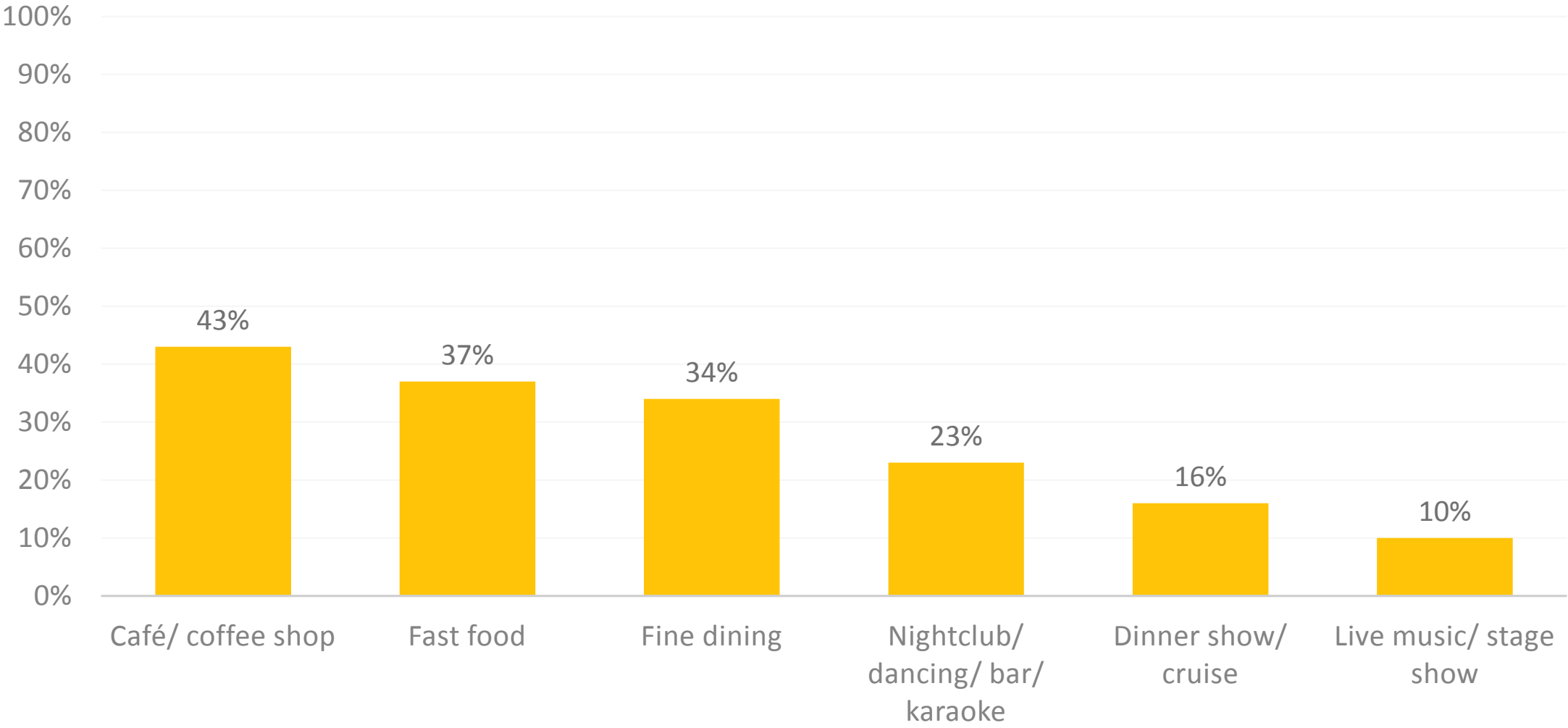
# ACTIVITIES – SPORTS



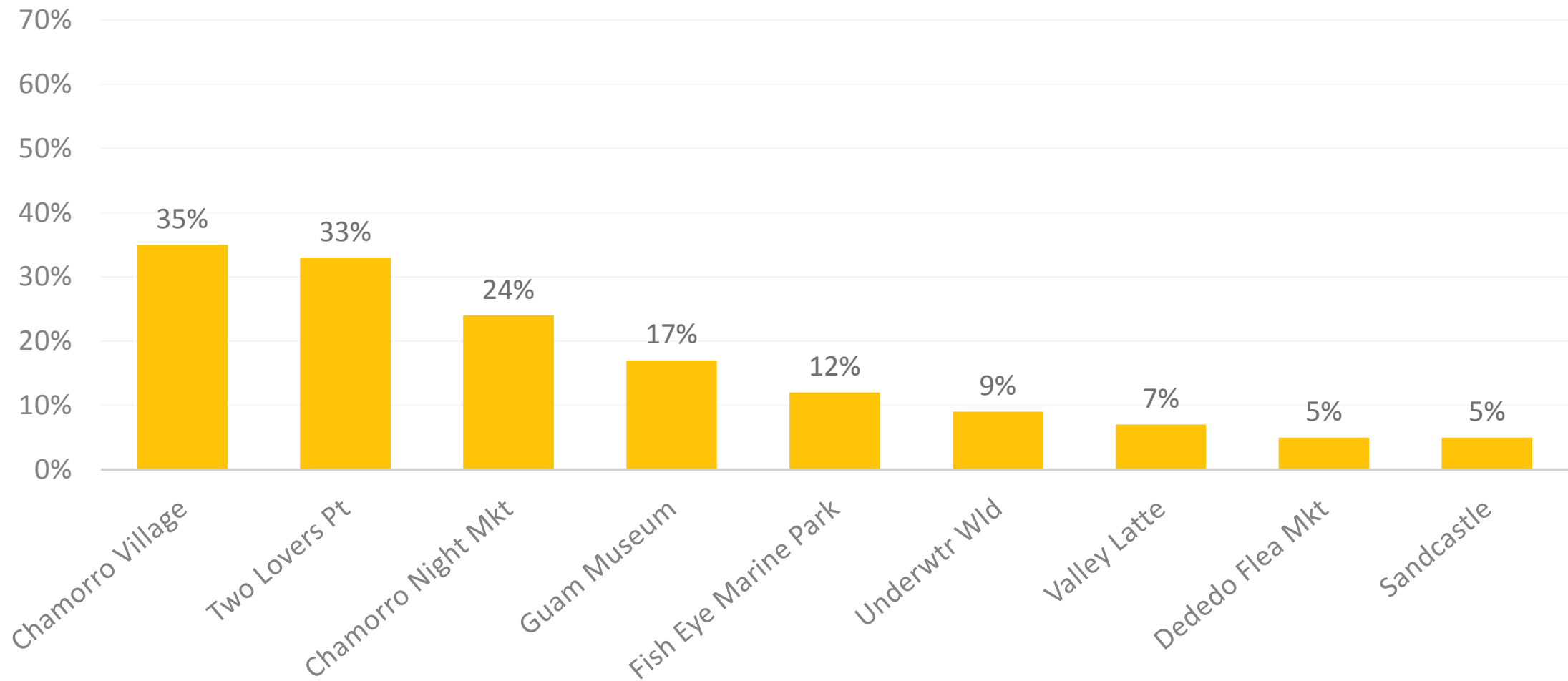
# ACTIVITIES – HISTORY, CULTURE, ARTS



# ACTIVITIES – ENTERTAINMENT & DINING

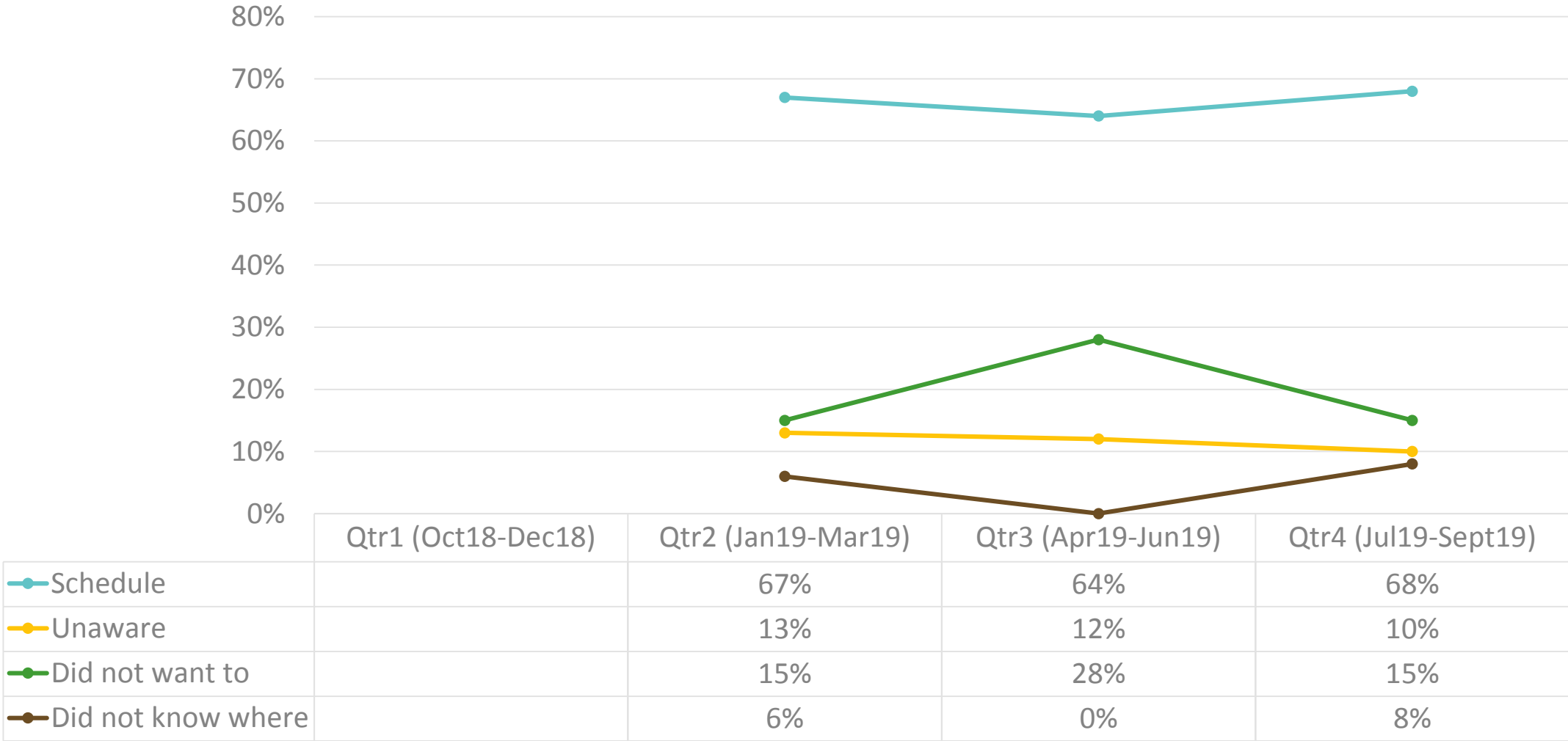


# LOCAL ATTRACTIONS – TOP RESPONSES (5%+)





# LOCAL CULTURE – OBSTACLES



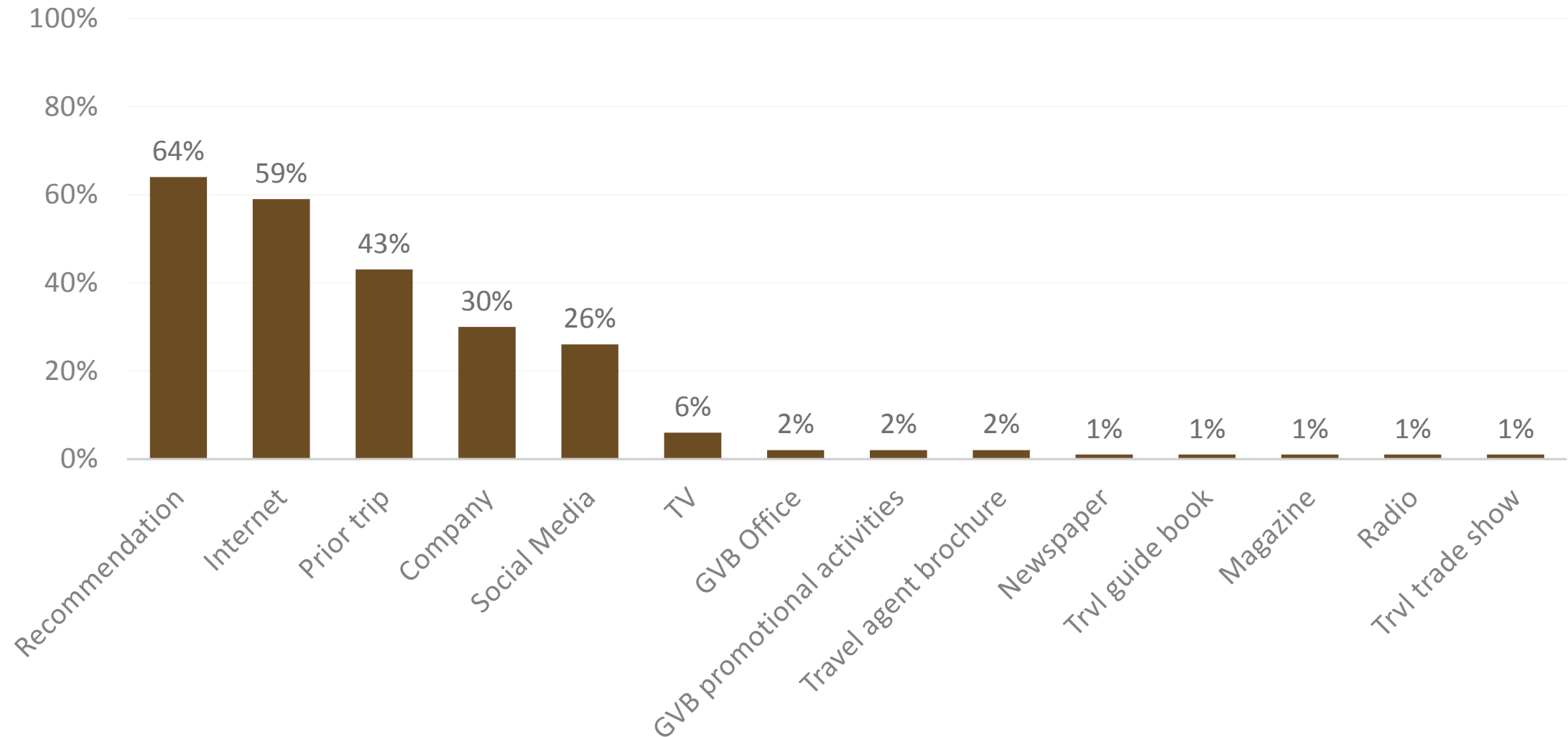


SECTION 6

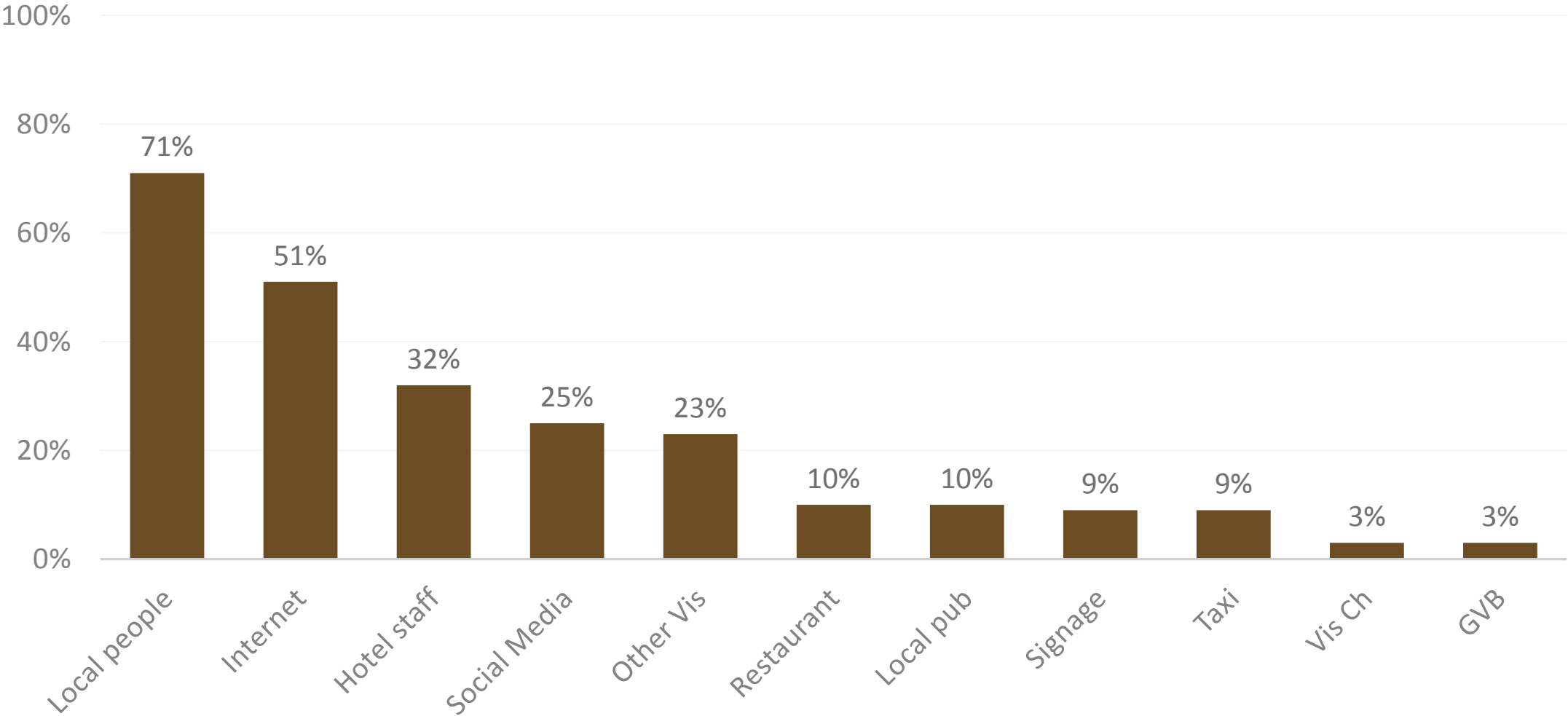
# SOURCES OF INFORMATION



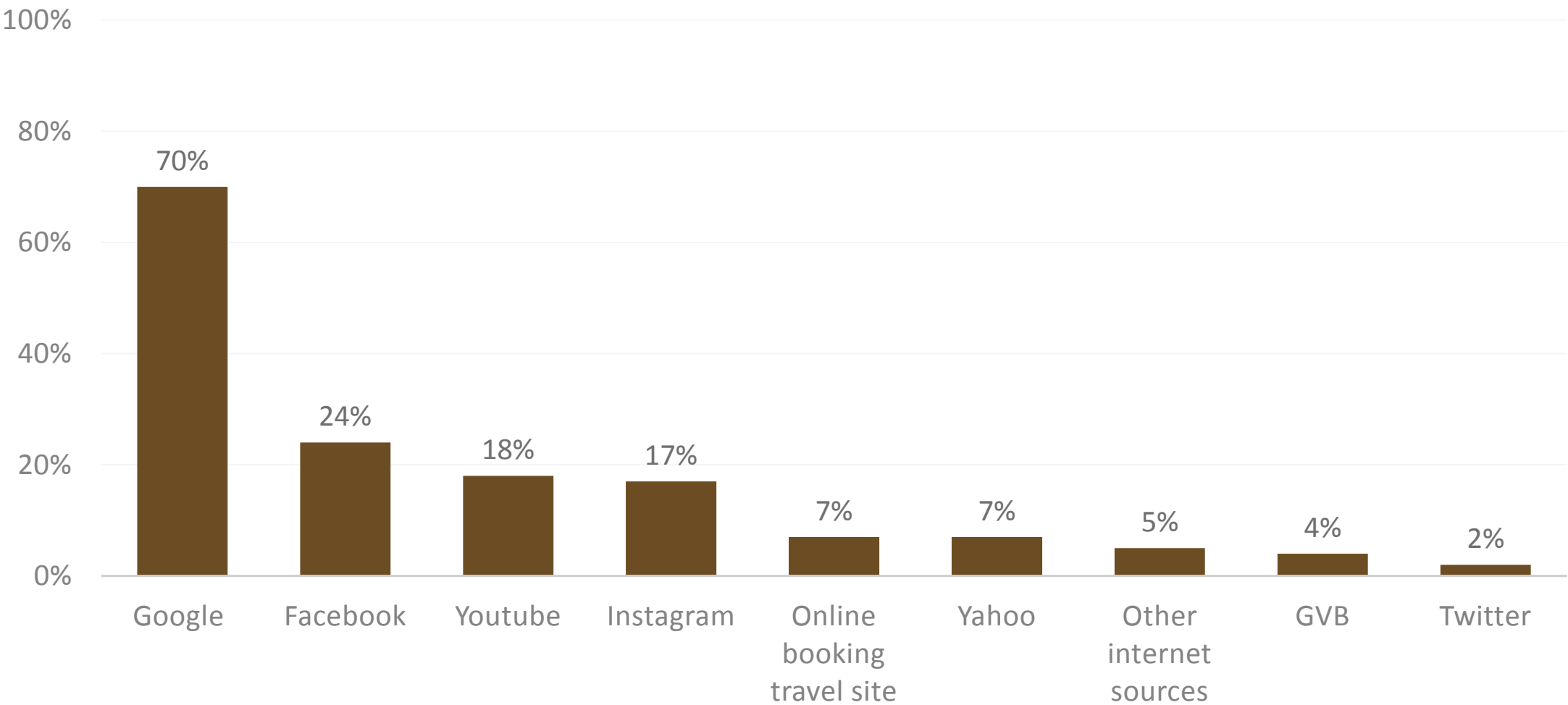
# PRE-ARRIVAL SOURCES OF INFORMATION



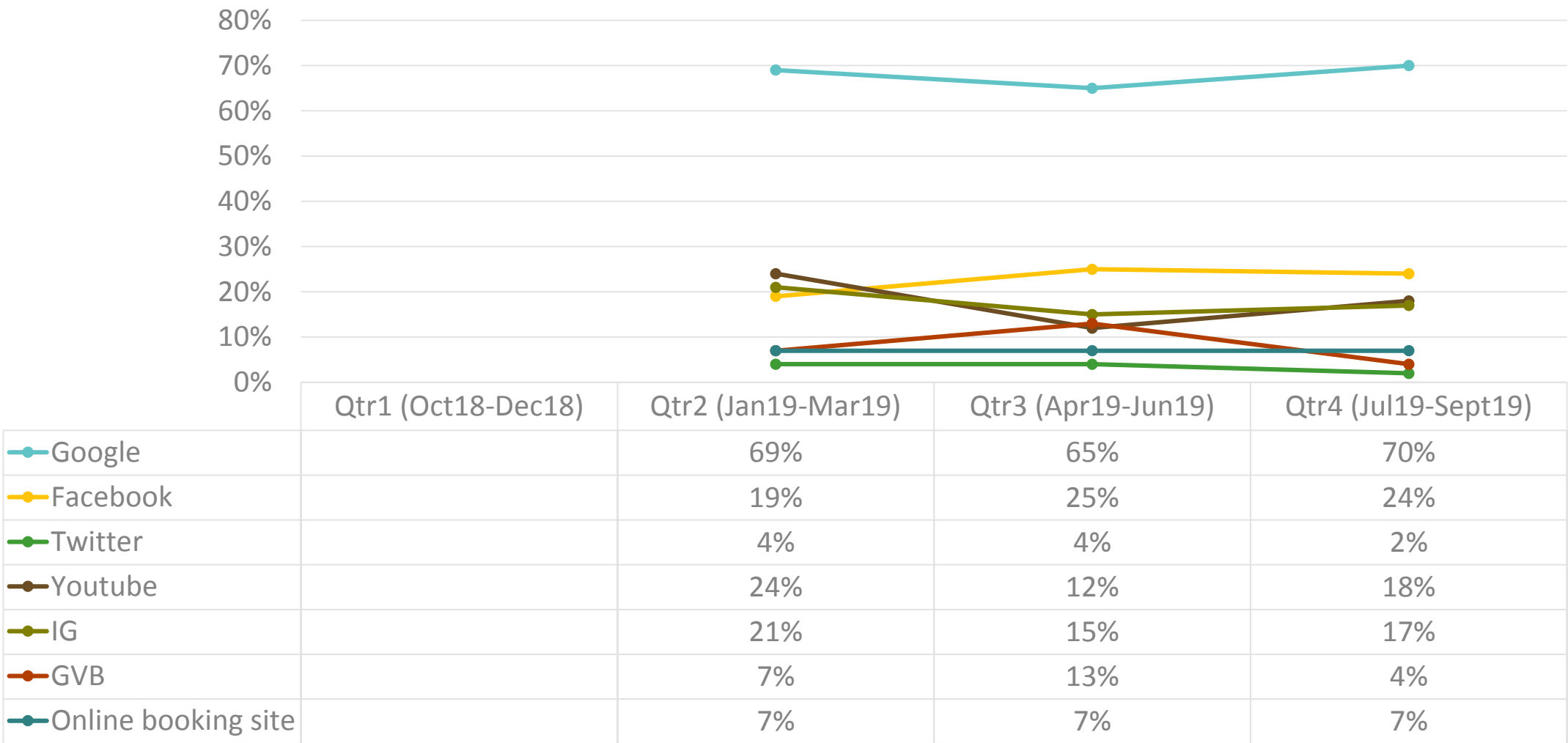
# ONISLE SOURCES OF INFORMATION



# ONLINE SOURCES OF INFORMATION



# ONLINE SOURCES OF INFORMATION





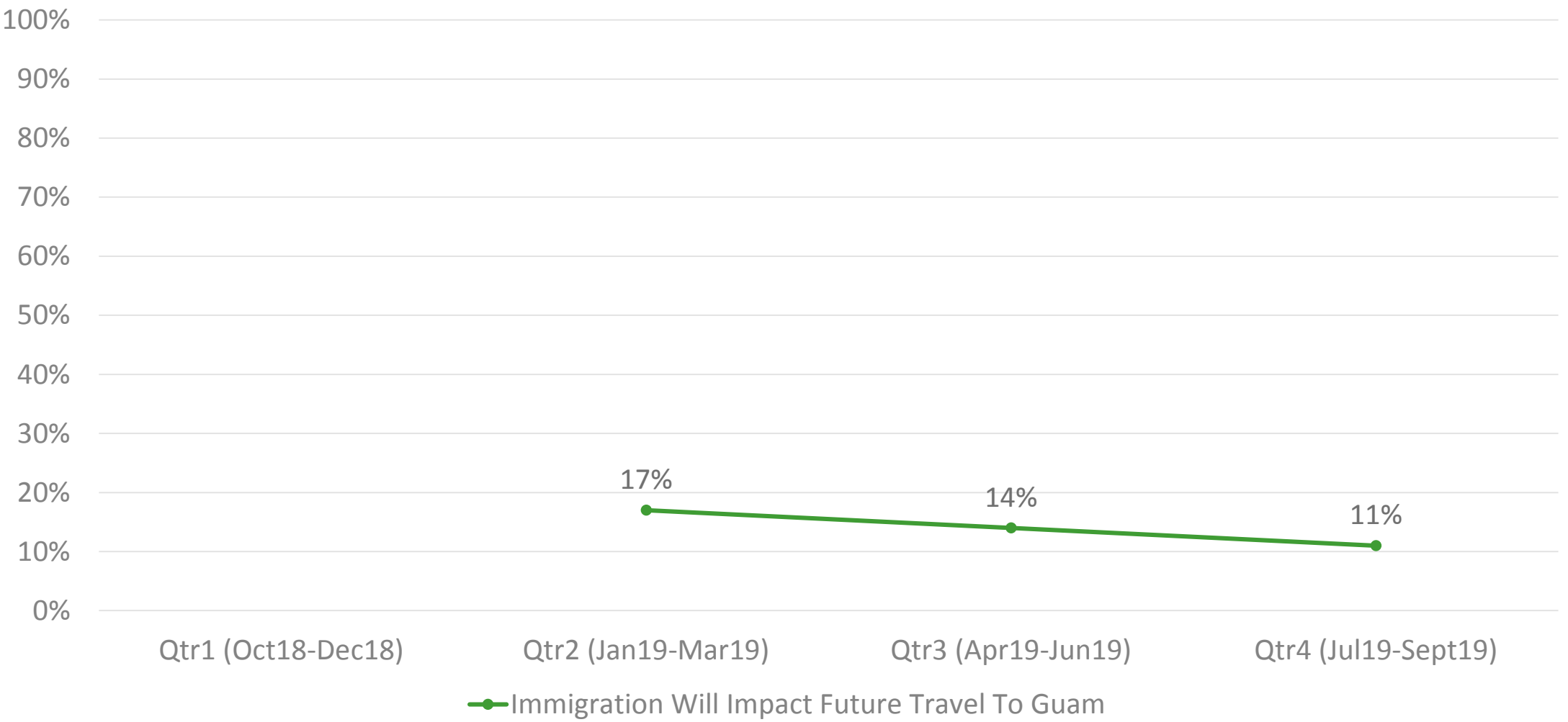


SECTION 7

# IMMIGRATION

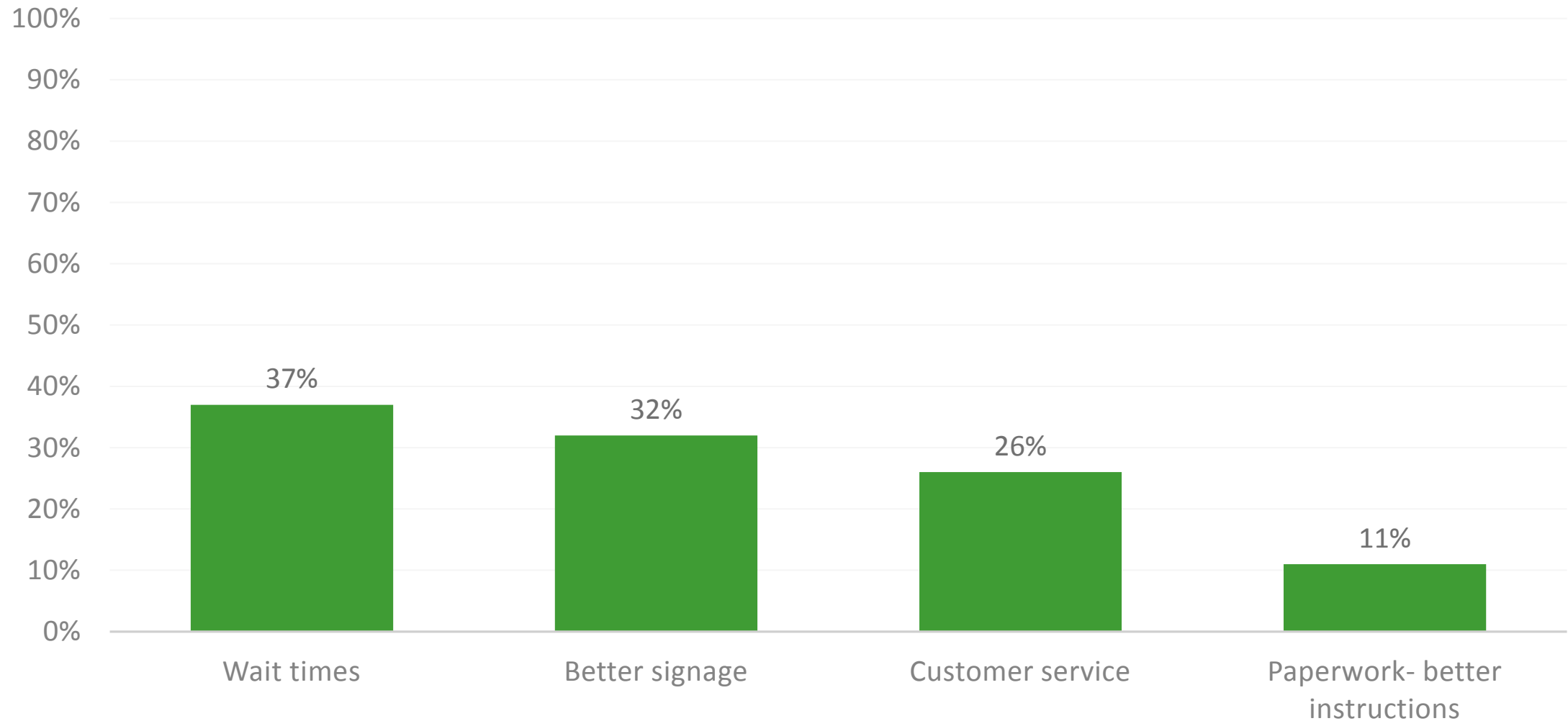


# IMPACT OF AIRPORT IMMIGRATION SVC ON FUTURE TRAVEL TO GUAM





# 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 ( $p < .05$ ) 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, 2-4th Qtr. 2019				
	2nd Qtr. 2019	3rd Qtr. 2019	4th Qtr. 2019	2-4th Qtr. 2019
Drivers:	rank	rank	rank	rank
Entertainment	1	1		1
Shopping				
Dining		3		
Beaches				
Parks			3	
Roads	2			
Sightseeing Areas			1	2
Being a safe and secure destination		1	2	3
% of Overall Satisfaction Accounted For:	42.5%	46.5%	51.3%	42.3%
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 4<sup>th</sup> Quarter 2019 Period. By rank order they are:
  - **Sightseeing areas,**
  - **Being a safe & secure destination, and**
  - **Parks.**
- With these factors the overall  $r^2$  is .513 meaning that **51.3% of overall satisfaction is accounted for by these factors.**



# DRIVERS – ONISLE EXPENDITURES

Comparison of Drivers of Per Person On Island Expenditures, 2-4 Qtr. 2019				
	2nd Qtr. 2019	3rd Qtr. 2019	4th Qtr. 2019	2-4th Qtr. 2019
Drivers:	rank	rank	rank	rank
Entertainment				1
Shopping				
Dining				
Beaches				
Parks				
Roads				
Sightseeing Areas			1	
Being a safe and secure destination				
% of Overall Satisfaction Accounted For:	0.0%	0.0%	6.0%	1.4%
NOTE: Only significant drivers are included.				

# DRIVERS – ONISLE EXPENDITURES

- **Per Person On Island Expenditure** of U.S. visitors on Guam is driven by one significant factor in the 4<sup>th</sup> Quarter 2019 Period. It is:
  - **Sightseeing areas.**
- With this factor, the overall  $r^2$  is .060 meaning that **6.0% of per person on island expenditure is accounted for by this factor.**