

UNITED STATES VISITOR PROFILE

OCTOBER - DECEMBER 2019

VISITOR SATISFACTION



59%
VERY
SATISFIED



8.7/10
AVERAGE

16%
EVENT WITH
FRIENDS
AND FAMILY



Best

Worst



13%
TRAFFIC
CONGESTED/SLOW



58%
EXTREMELY LIKELY
TO RECOMMEND

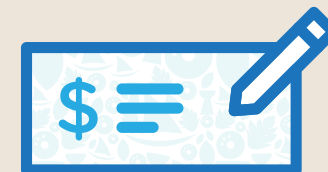


51%
EXTREMELY LIKELY
TO RETURN IN THE
NEXT THREE YEARS

SPENDING



\$222.97
ON ISLAND
PER PERSON
PER DAY



\$2,990.60
TOTAL SPENDING
PER PERSON
(PREPAID + ON ISLAND)

MOST POPULAR



Sightseeing

49% Self-Guided/Drove Around

Entertainment & Dining

45% Café/Coffee Shop

Recreation

41% Swimming in Ocean

History, Culture & Arts

32% Historic Military Site

Local Attractions

28% Chamorro Village

Sports

17% Snorkeling



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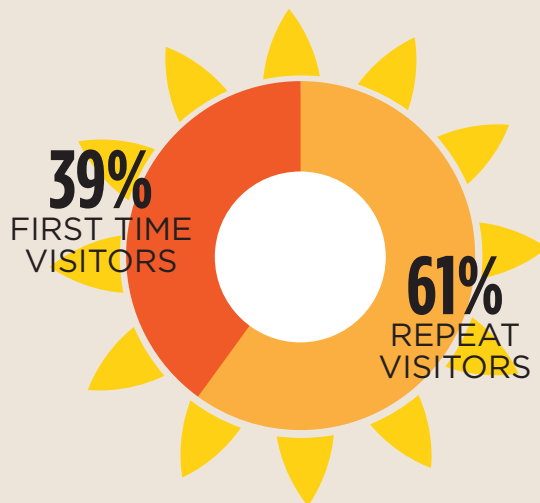
TRAVELER PROFILE



41.7
AVERAGE AGE

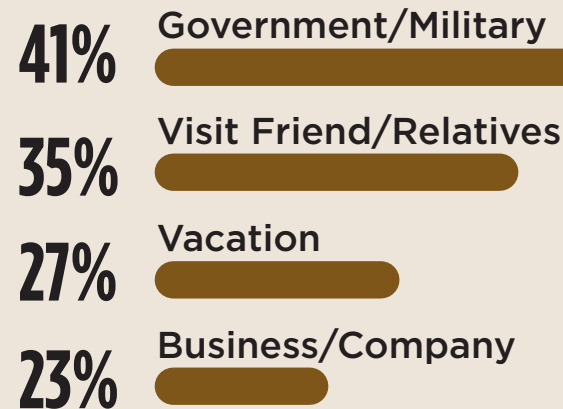


2.1
AVERAGE PARTY SIZE



12.6
NIGHTS
AVERAGE LENGTH OF STAY

TRAVEL MOTIVATIONS



TRIP PLANNING



MADE TRAVEL ARRANGEMENTS ONLINE



21%
USED A TRAVEL WEBSITE

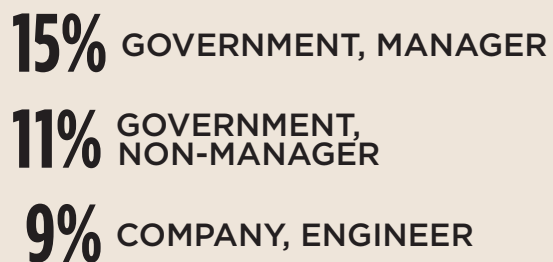
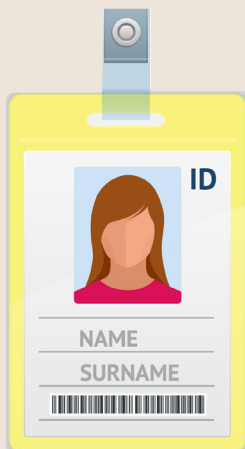


30%
USED A TRAVEL AGENT



49%
BOOKED DIRECT WITH AIRLINE AND/OR HOTEL

OCCUPATION





Guam Visitors Bureau

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

FY2020 – QTR.1 (OCT-DEC 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 184 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 184 is +/- 7.22 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 +/- 7.22 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.

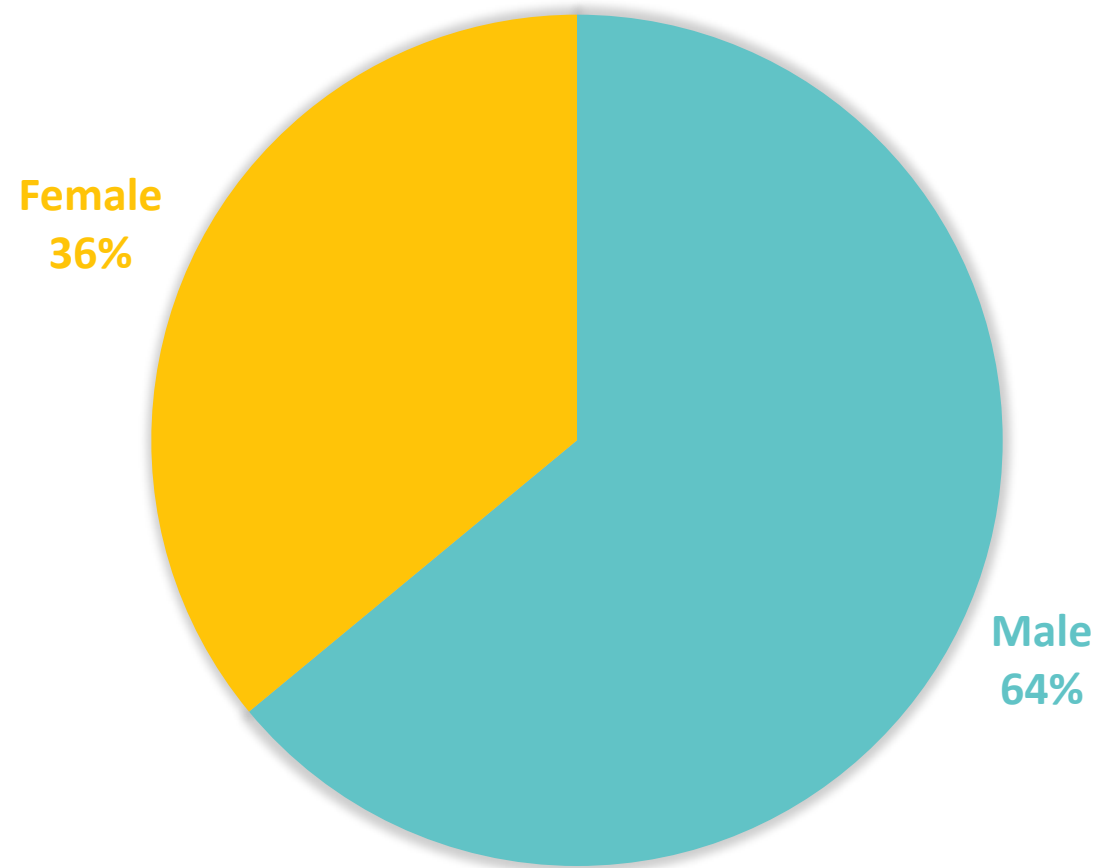


SECTION 1

PROFILE OF RESPONDENTS



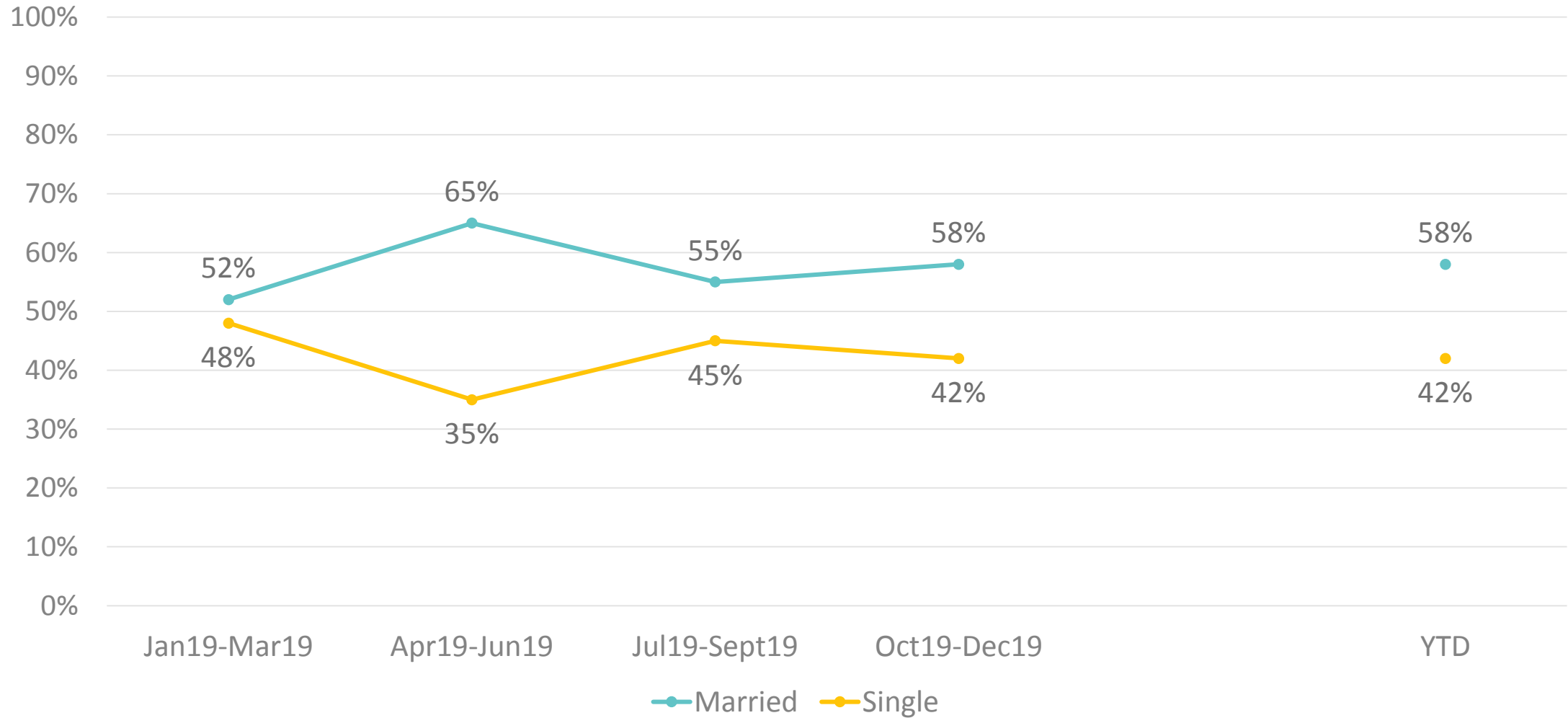
GENDER



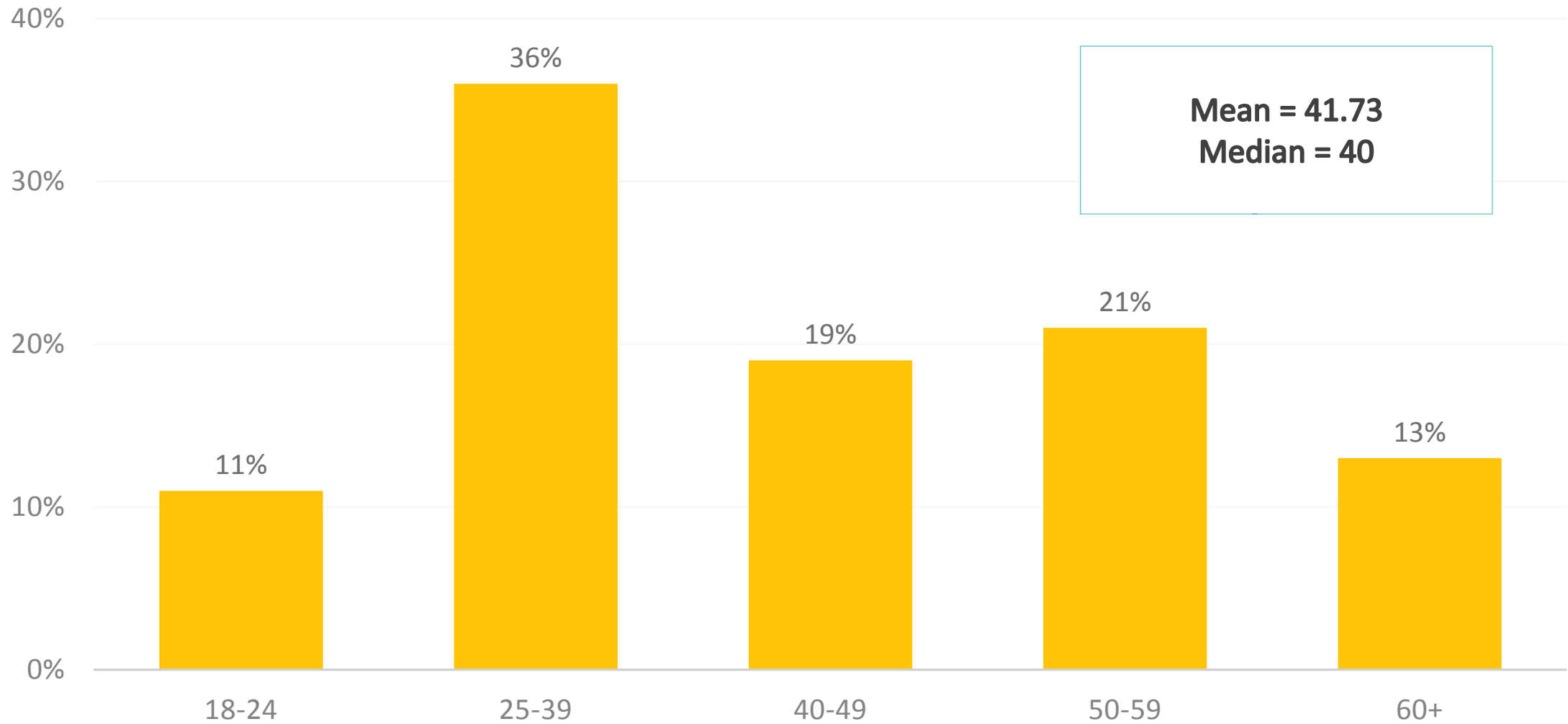
MARITAL STATUS



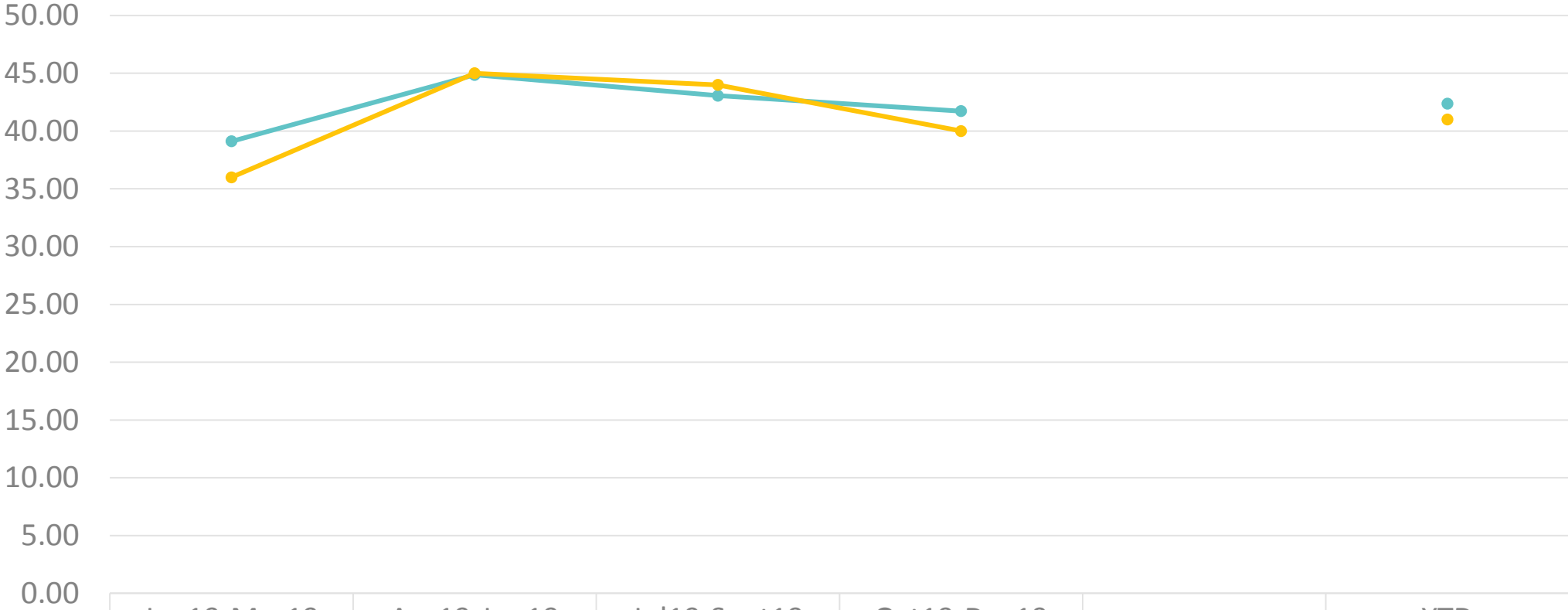
MARITAL STATUS – TRACKING



AGE



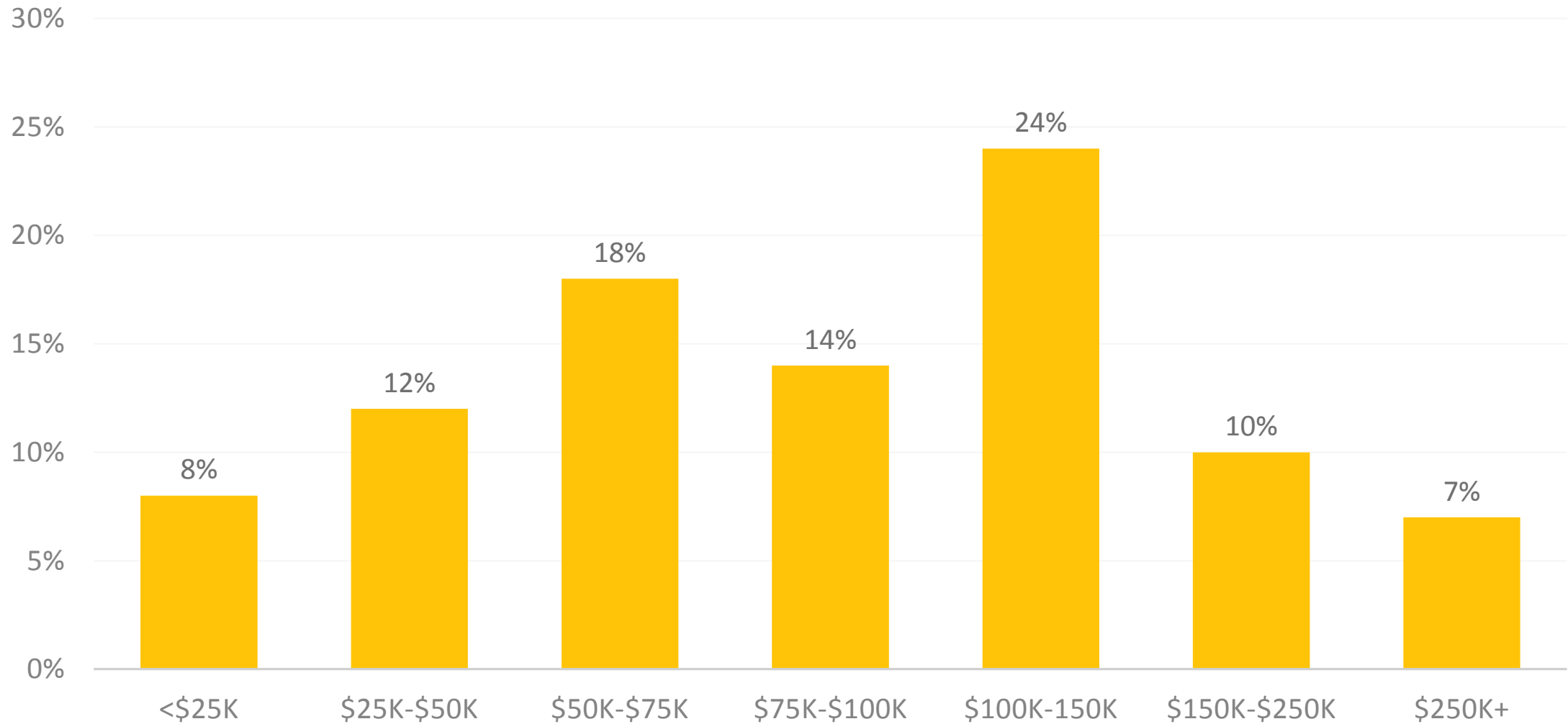
AGE – TRACKING



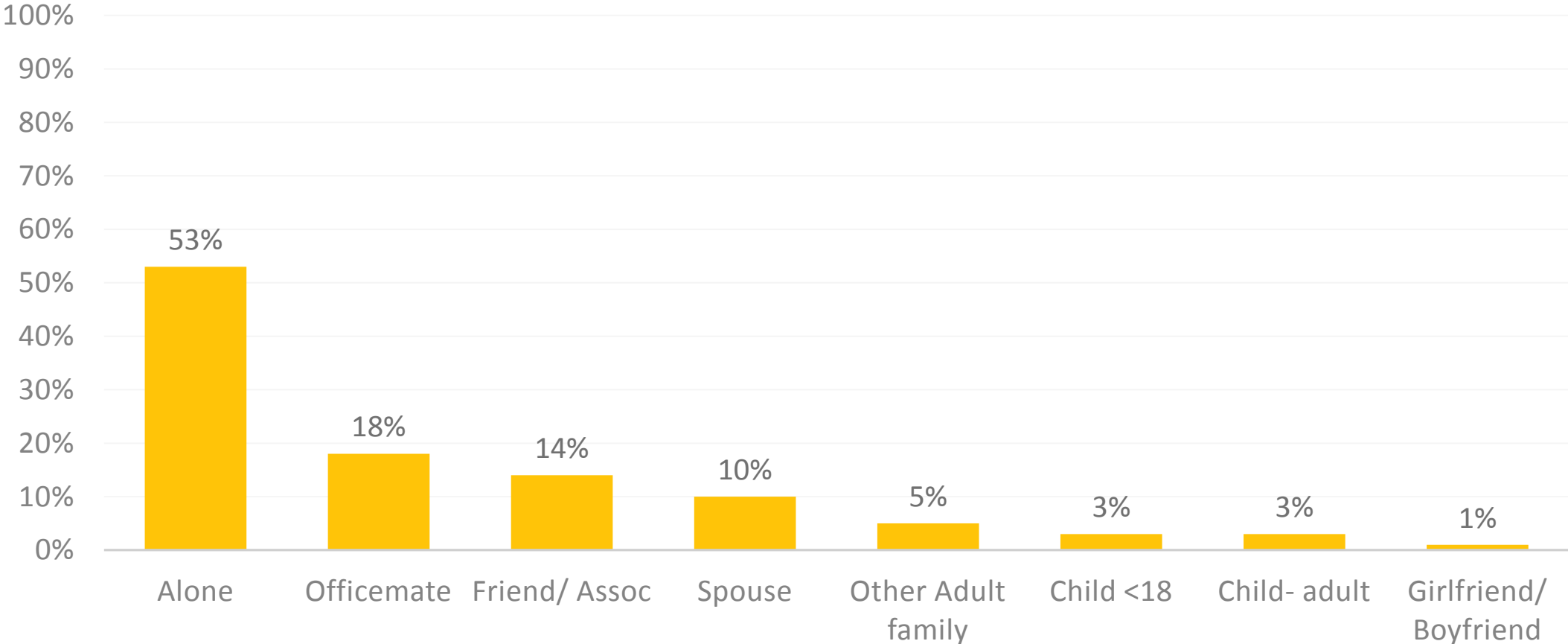
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	YTD
MEAN	39.11	44.86	43.06	41.73	42.38
MEDIAN	36	45	44	40	41



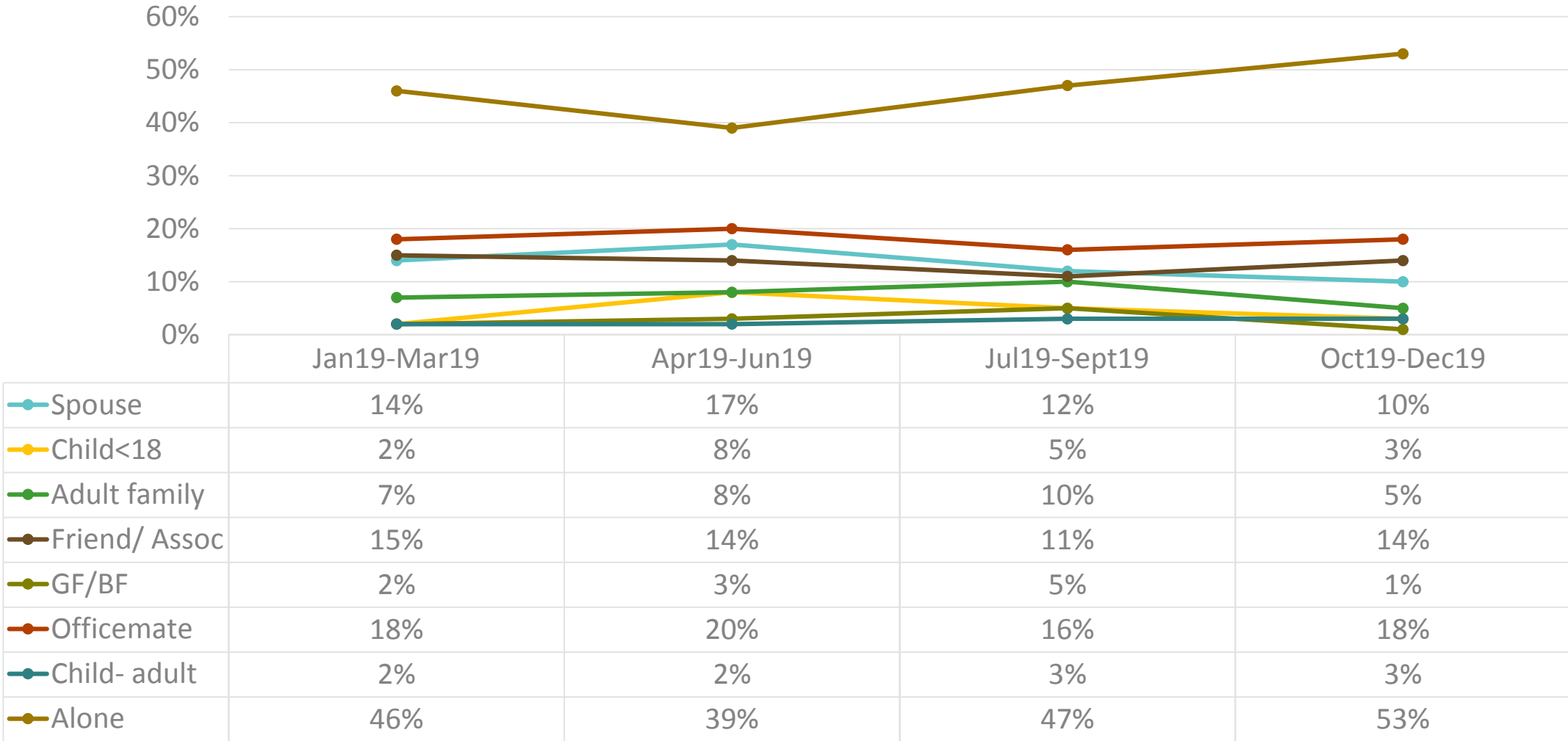
HOUSEHOLD INCOME



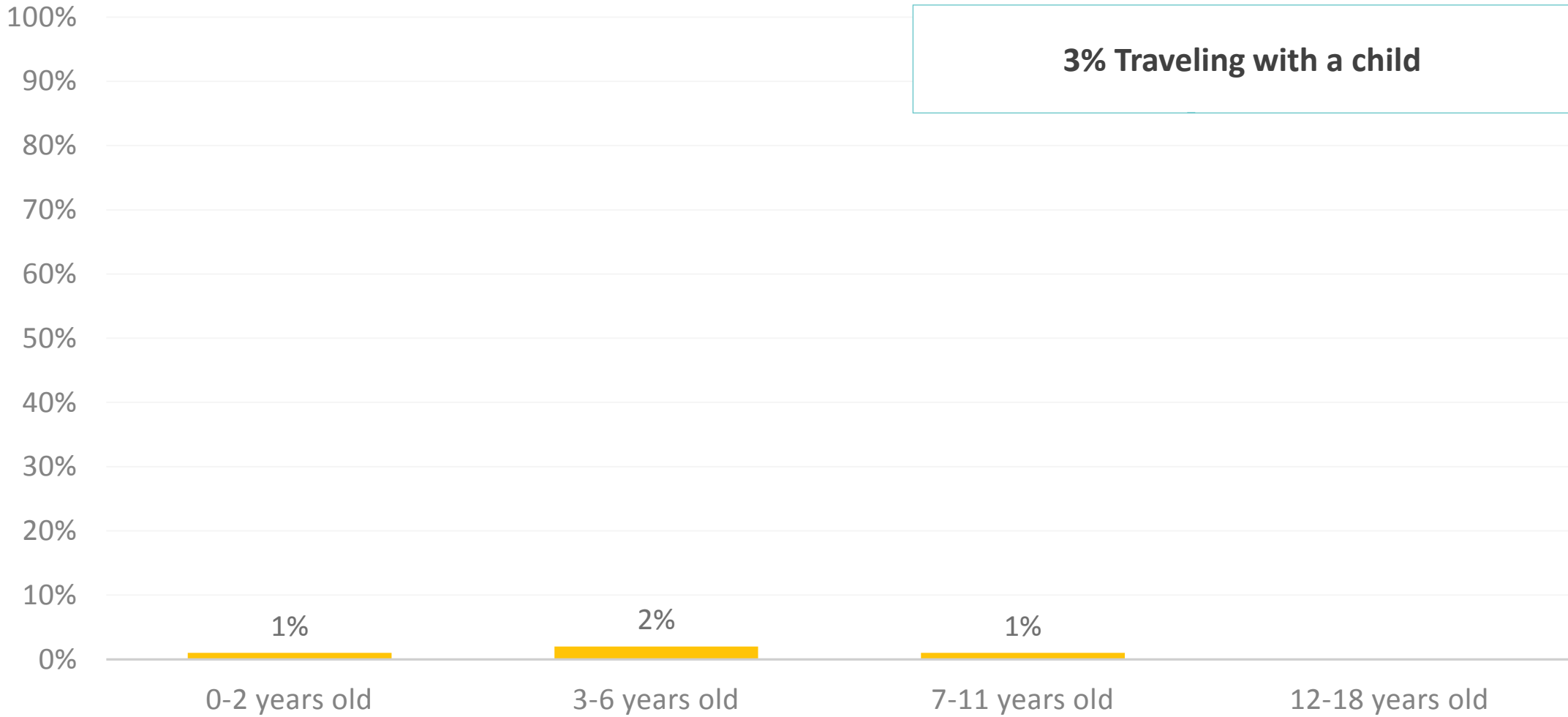
TRAVEL PARTY



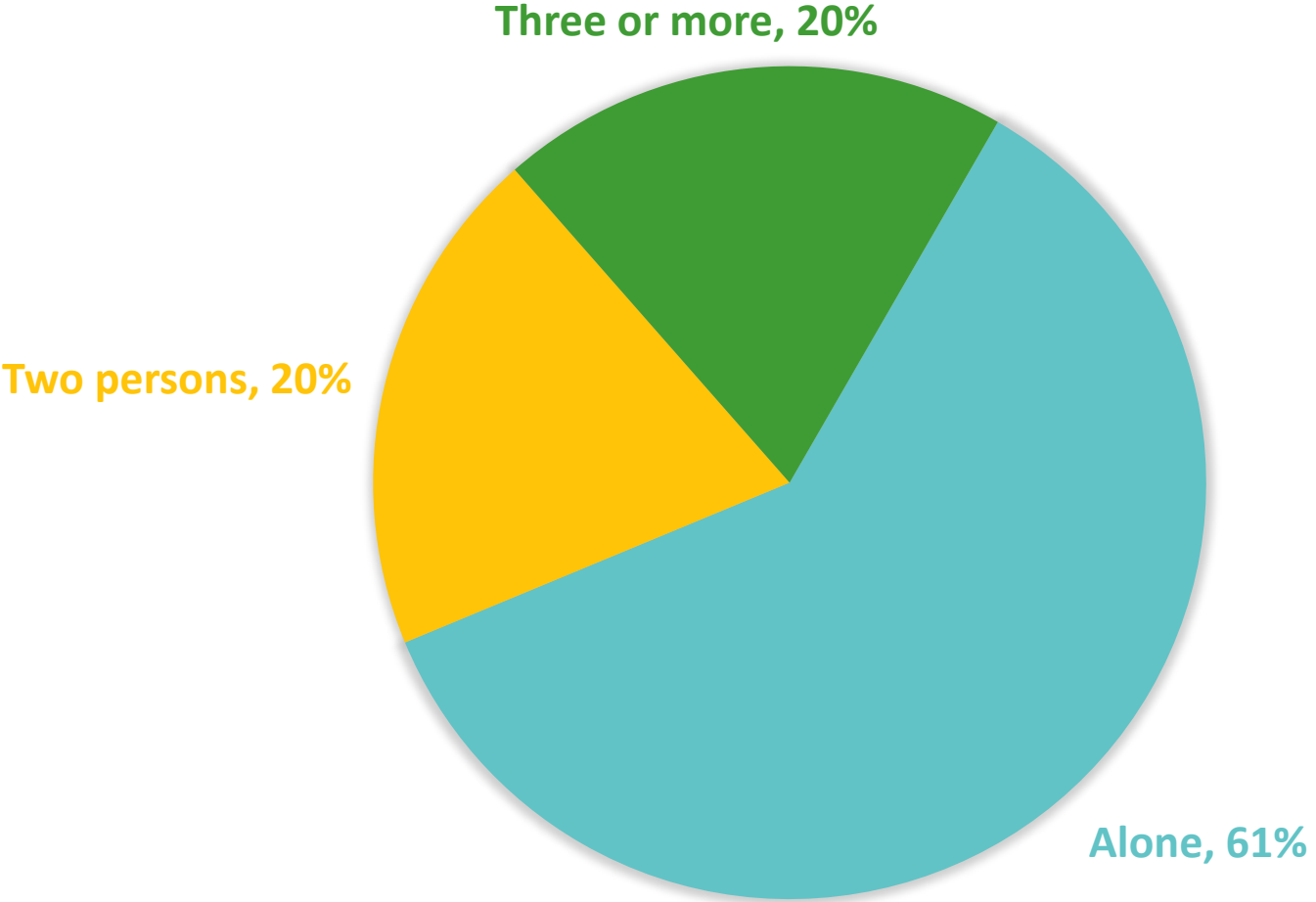
TRAVEL PARTY – TRACKING



TRAVEL PARTY – CHILD UNDER 18

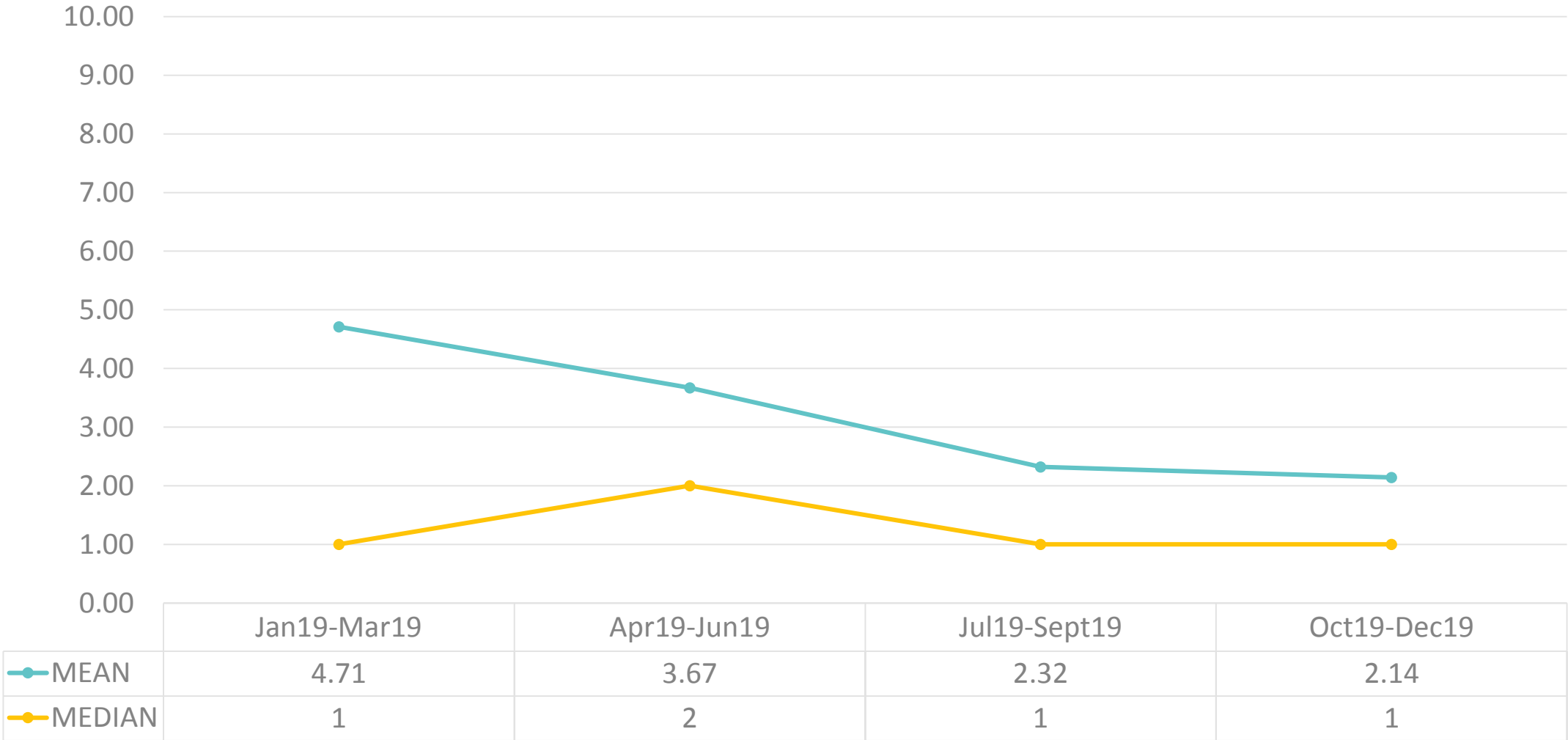


TRAVEL PARTY SIZE

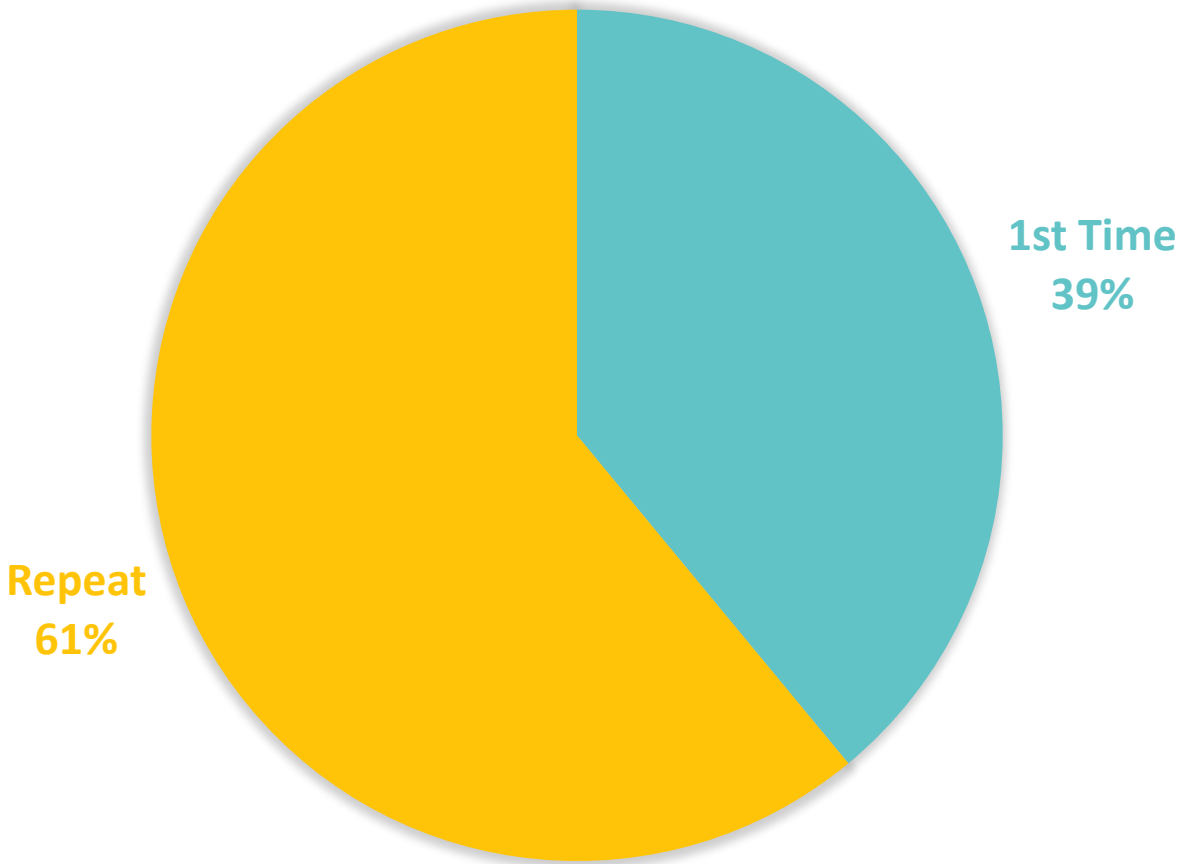


Mean = 2.14
Median = 1

TRAVEL PARTY SIZE – TRACKING



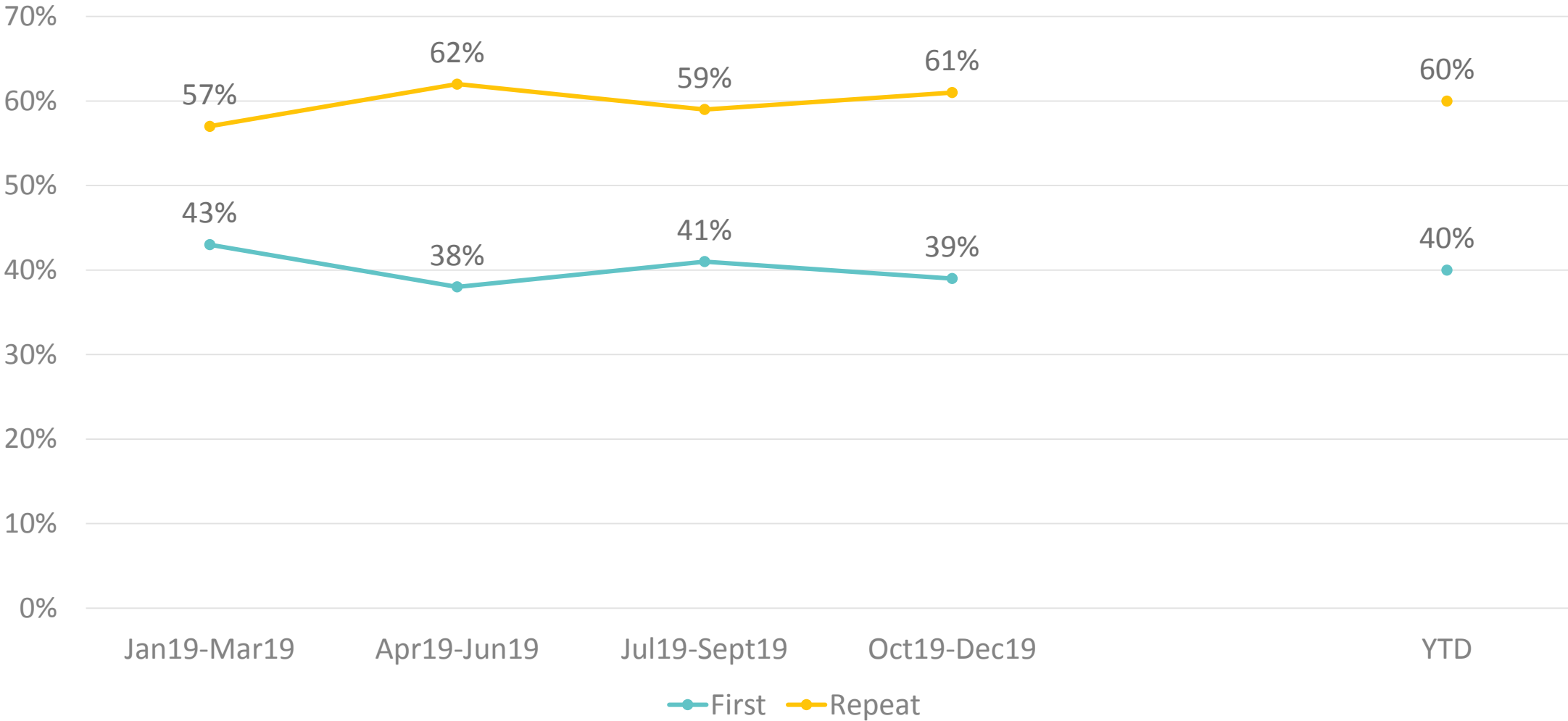
TRIPS TO GUAM



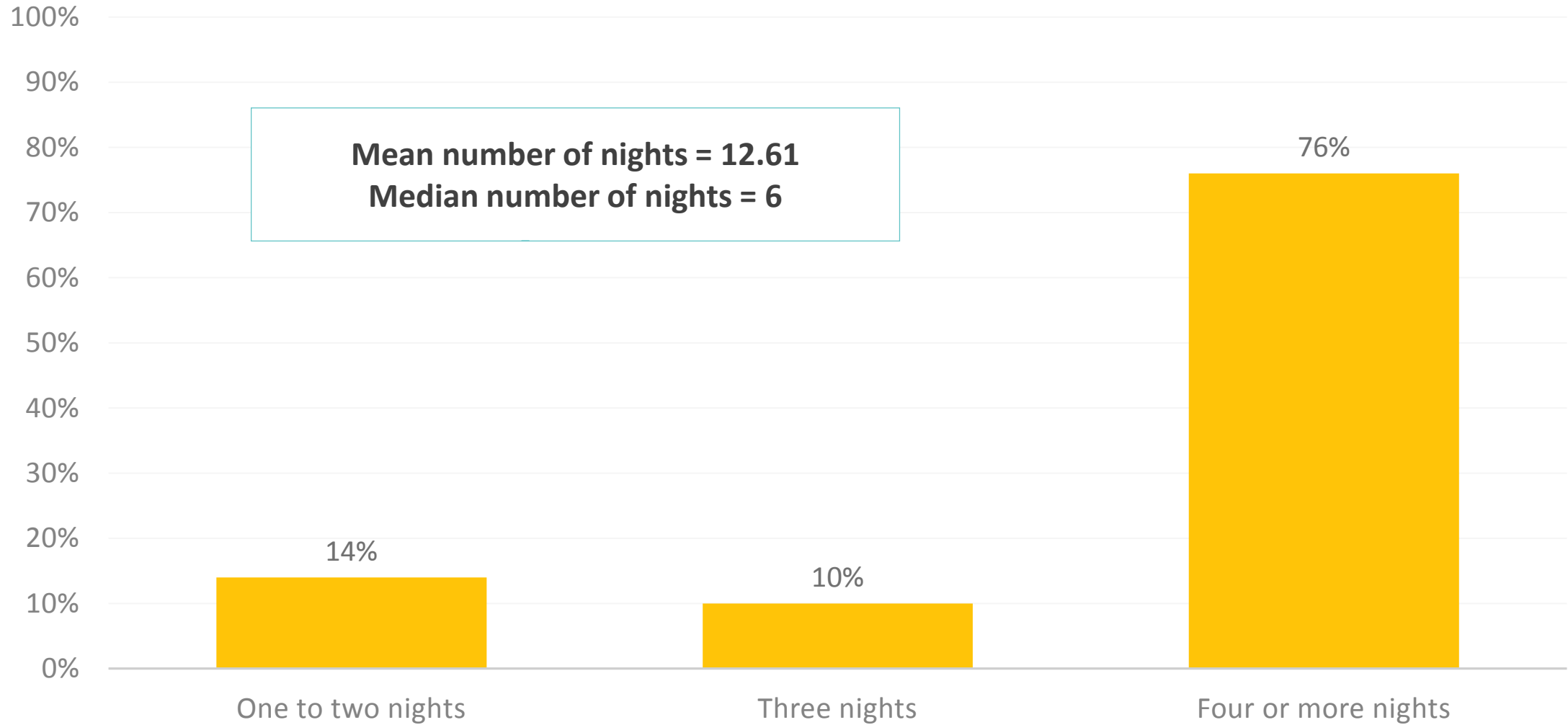
Mean = 6.22
Median = 2



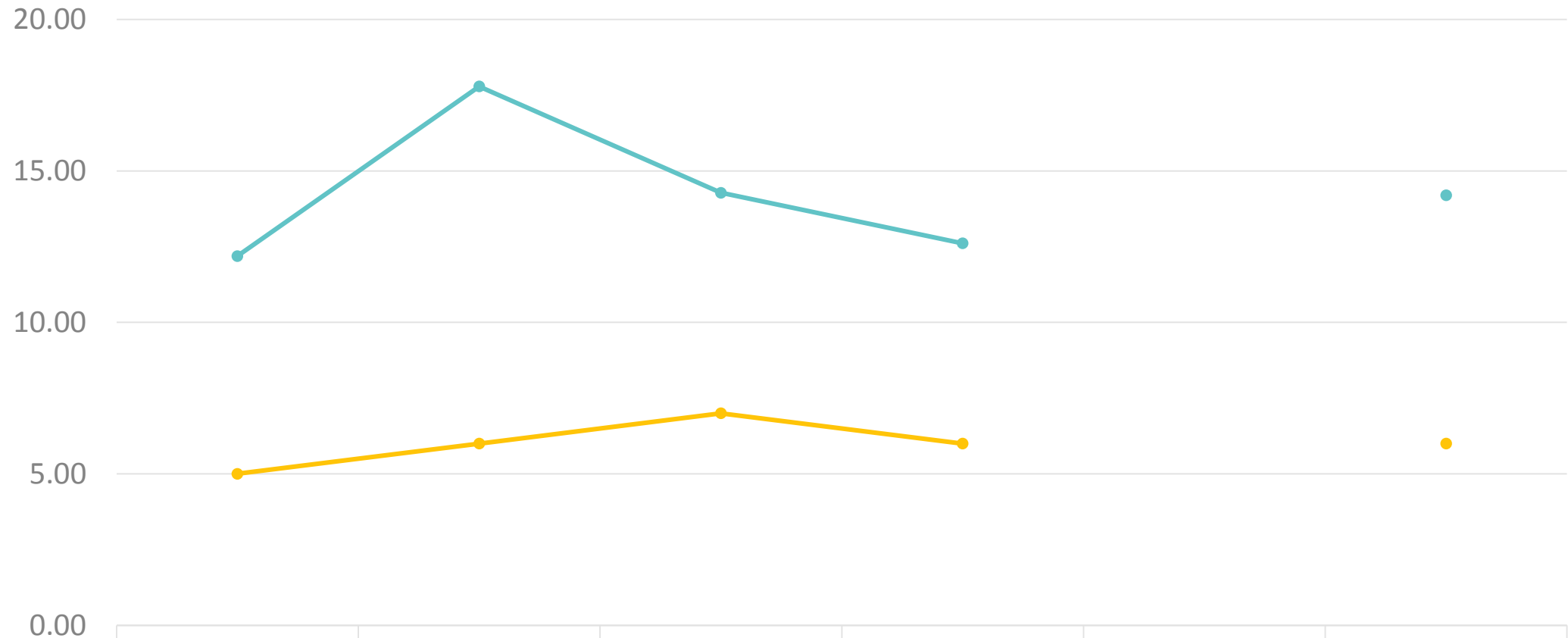
TRIPS TO GUAM – TRACKING



LENGTH OF STAY

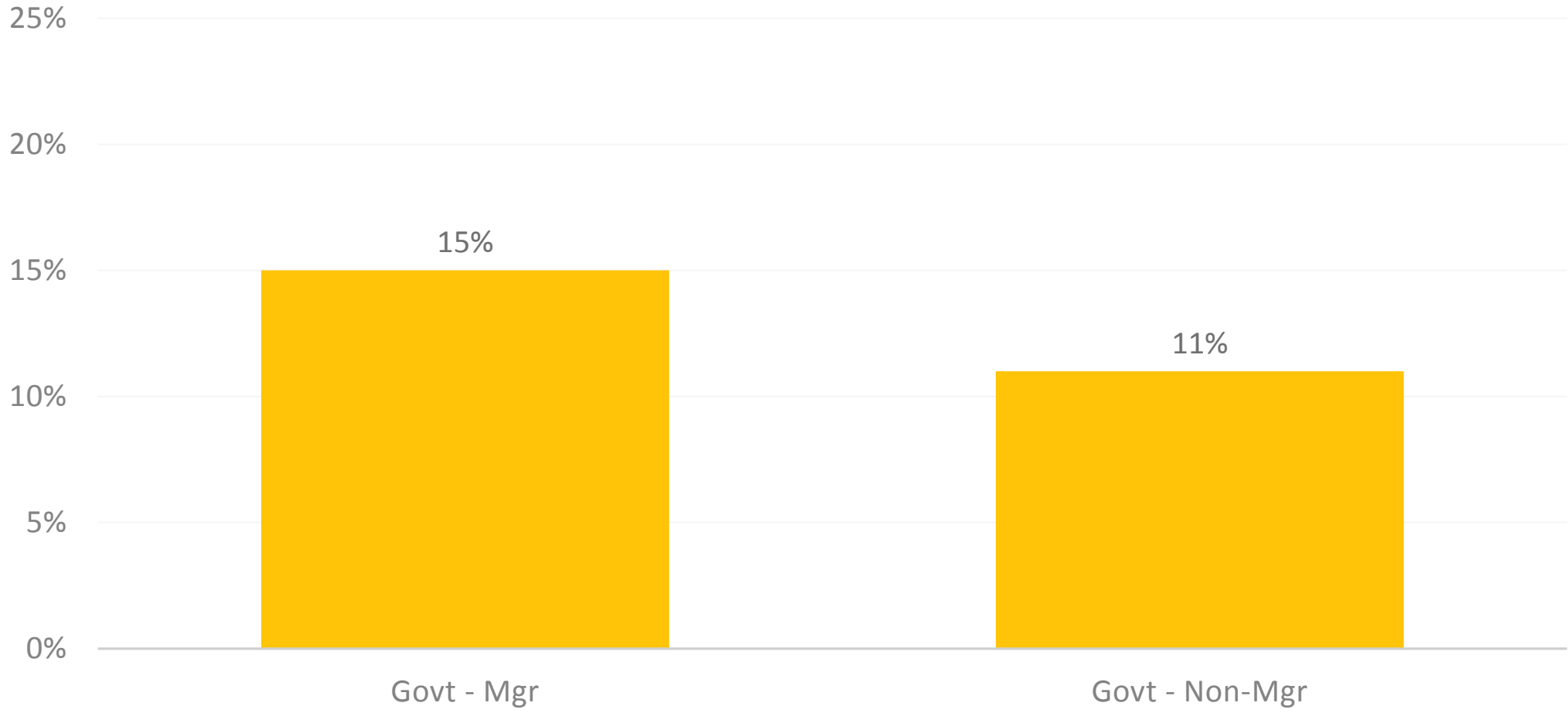


LENGTH OF STAY – TRACKING



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
MEAN	12.19	17.79	14.28	12.61		14.20
MEDIAN	5	6	7	6		6

OCCUPATION – Top Responses (10%+)

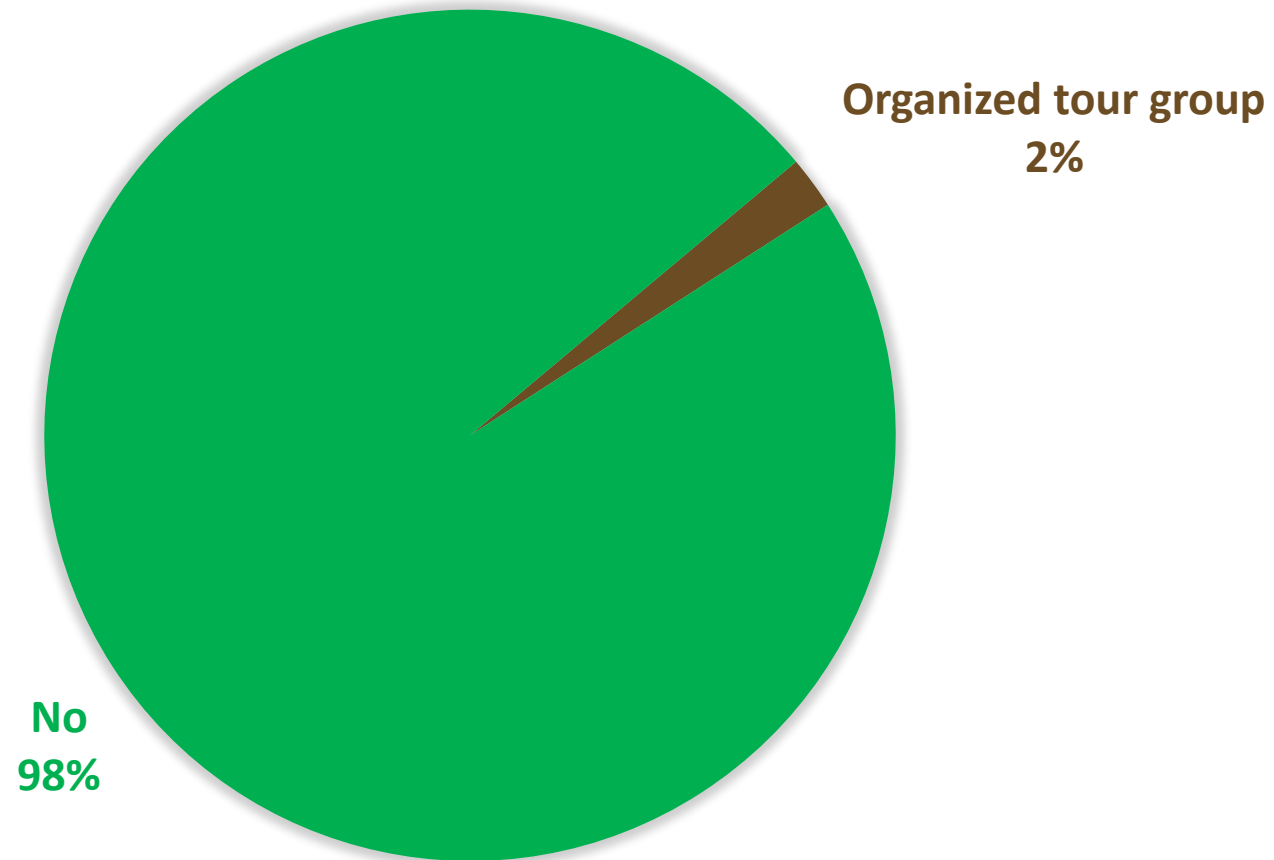




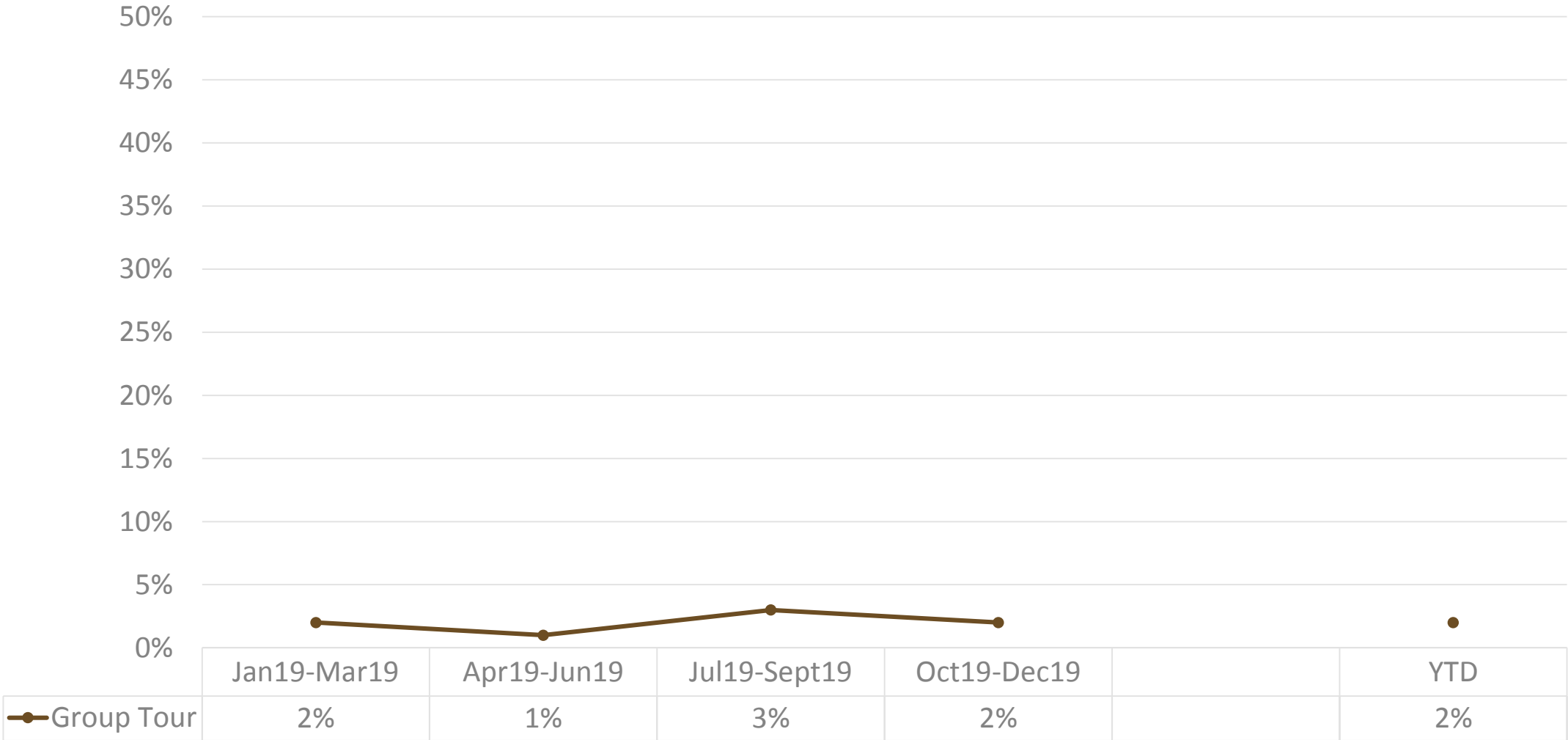
SECTION 2
TRAVEL PLANNING



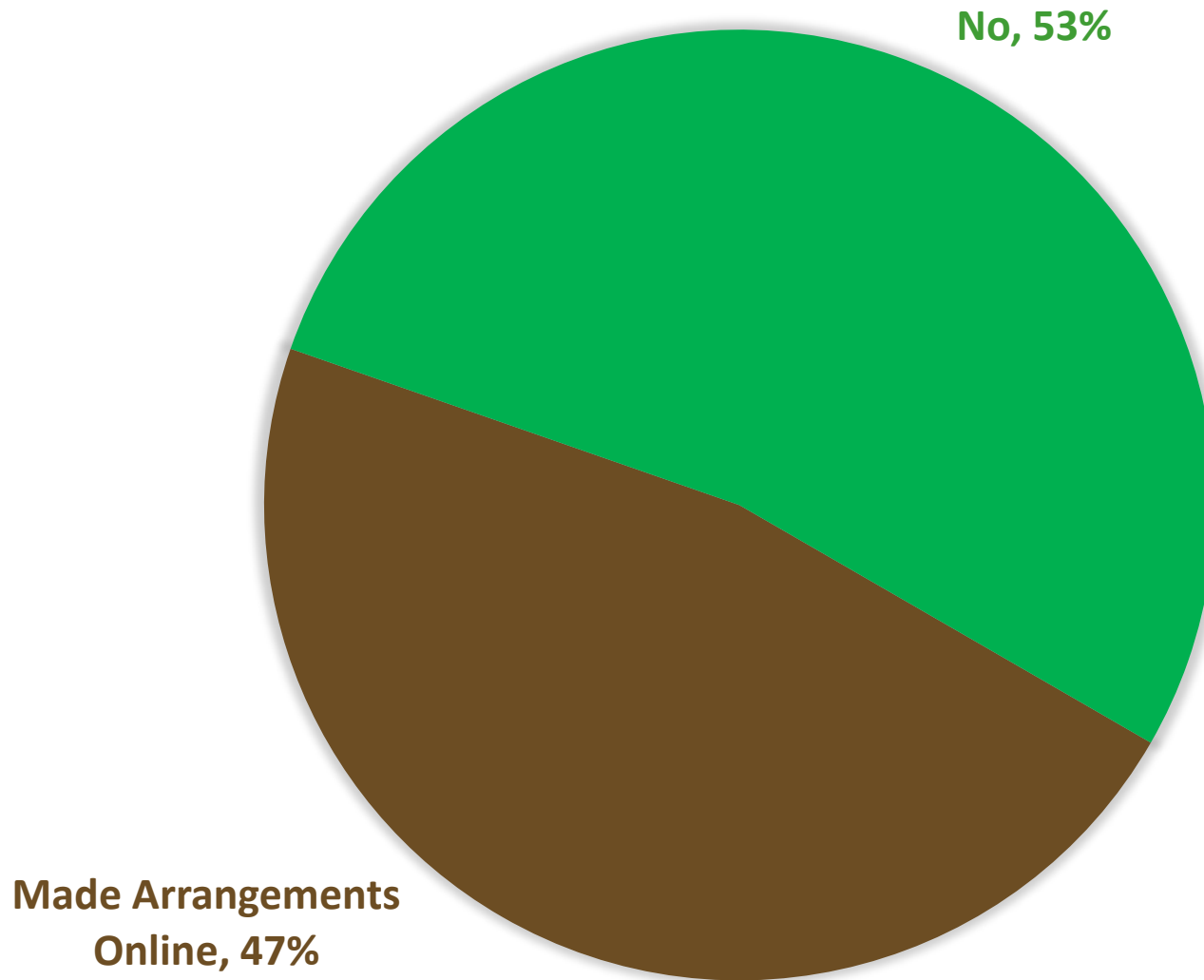
ORGANIZED TOUR GROUP



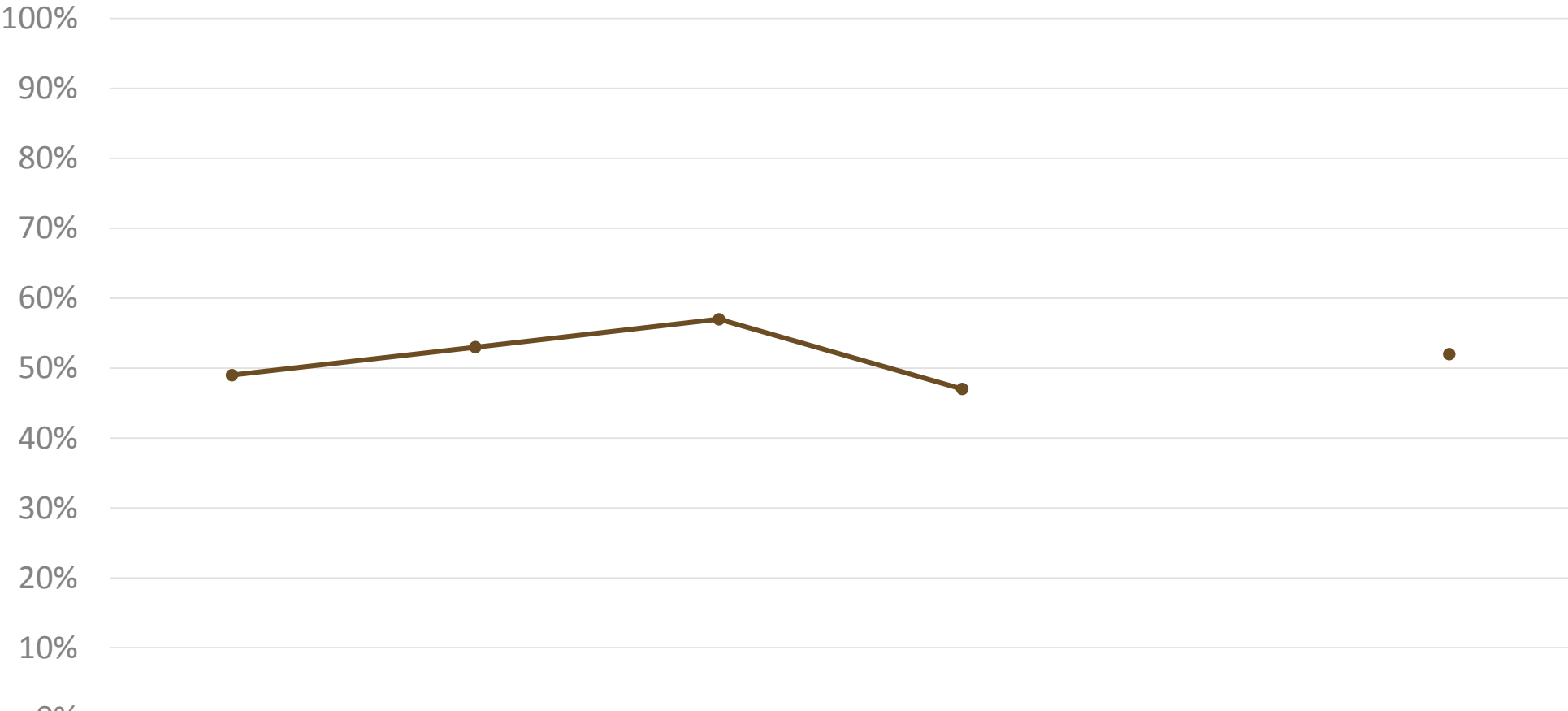
ORGANIZED TOUR GROUP – TRACKING



ONLINE BOOKING



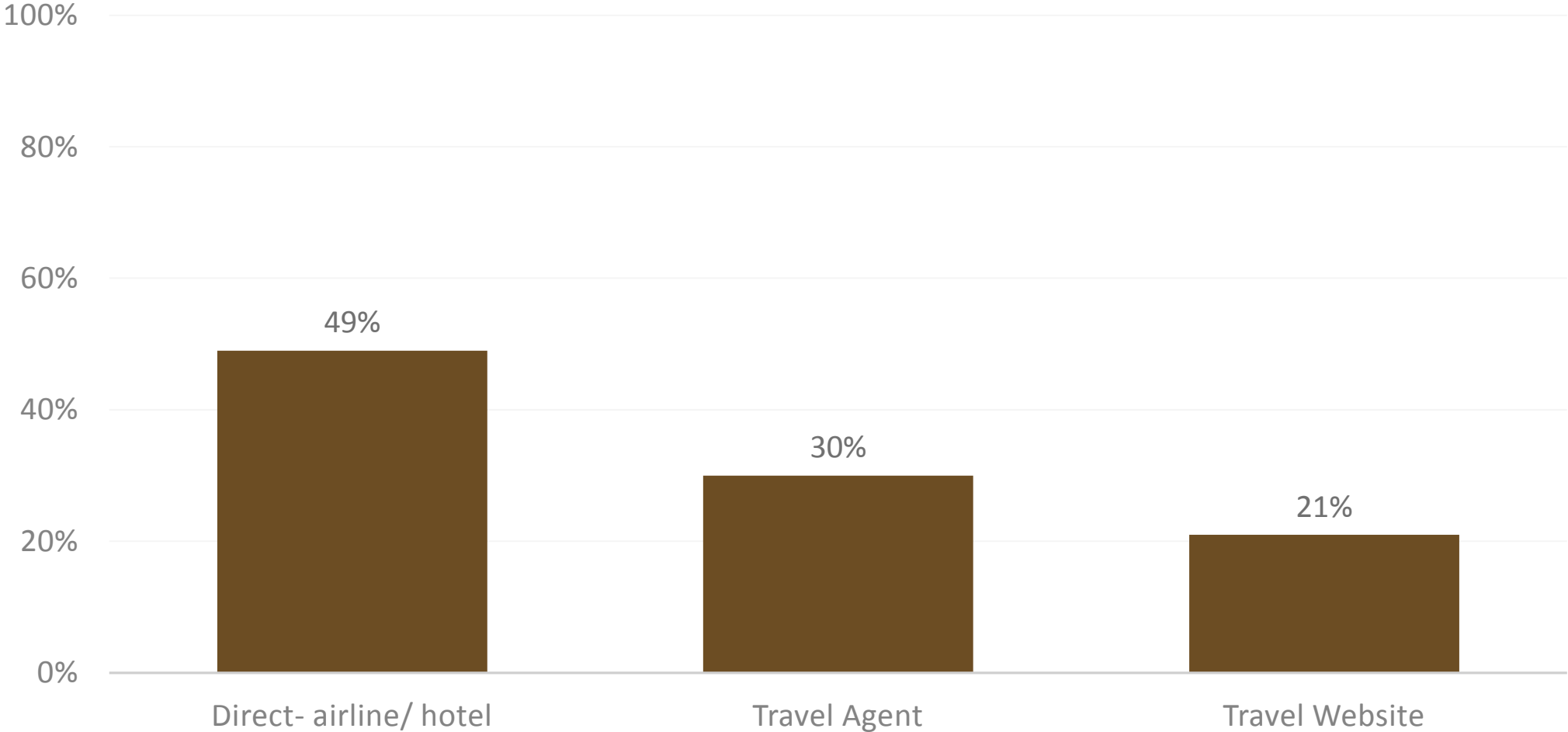
ONLINE BOOKING – TRACKING



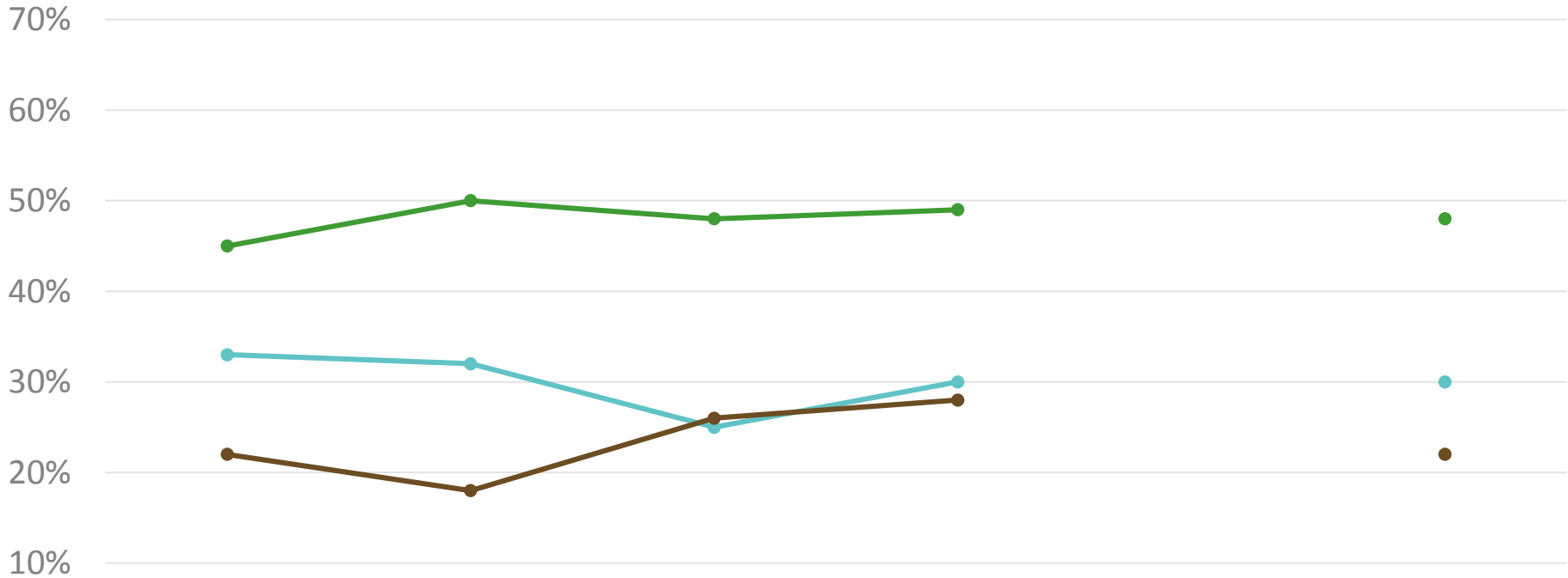
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
—●— Online Booking	49%	53%	57%	47%		52%



TRAVEL ARRANGEMENTS



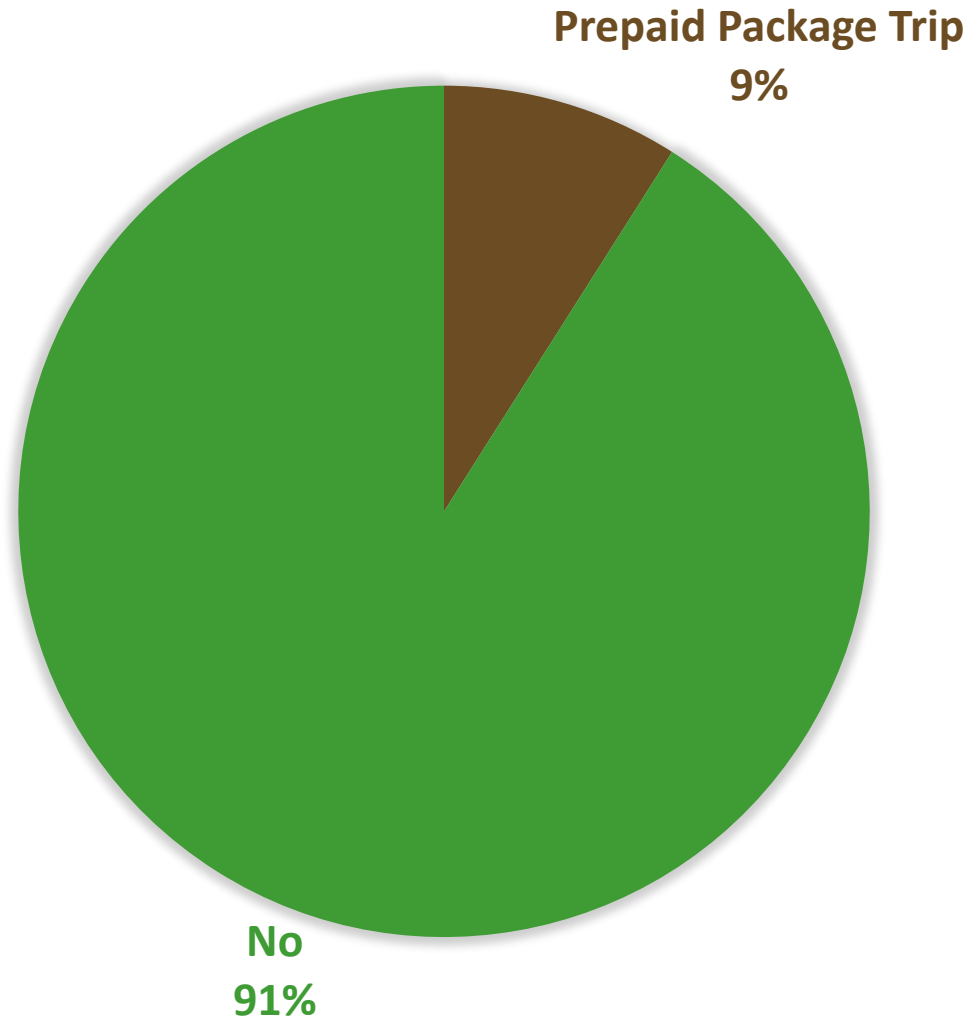
TRAVEL ARRANGEMENTS – TRACKING



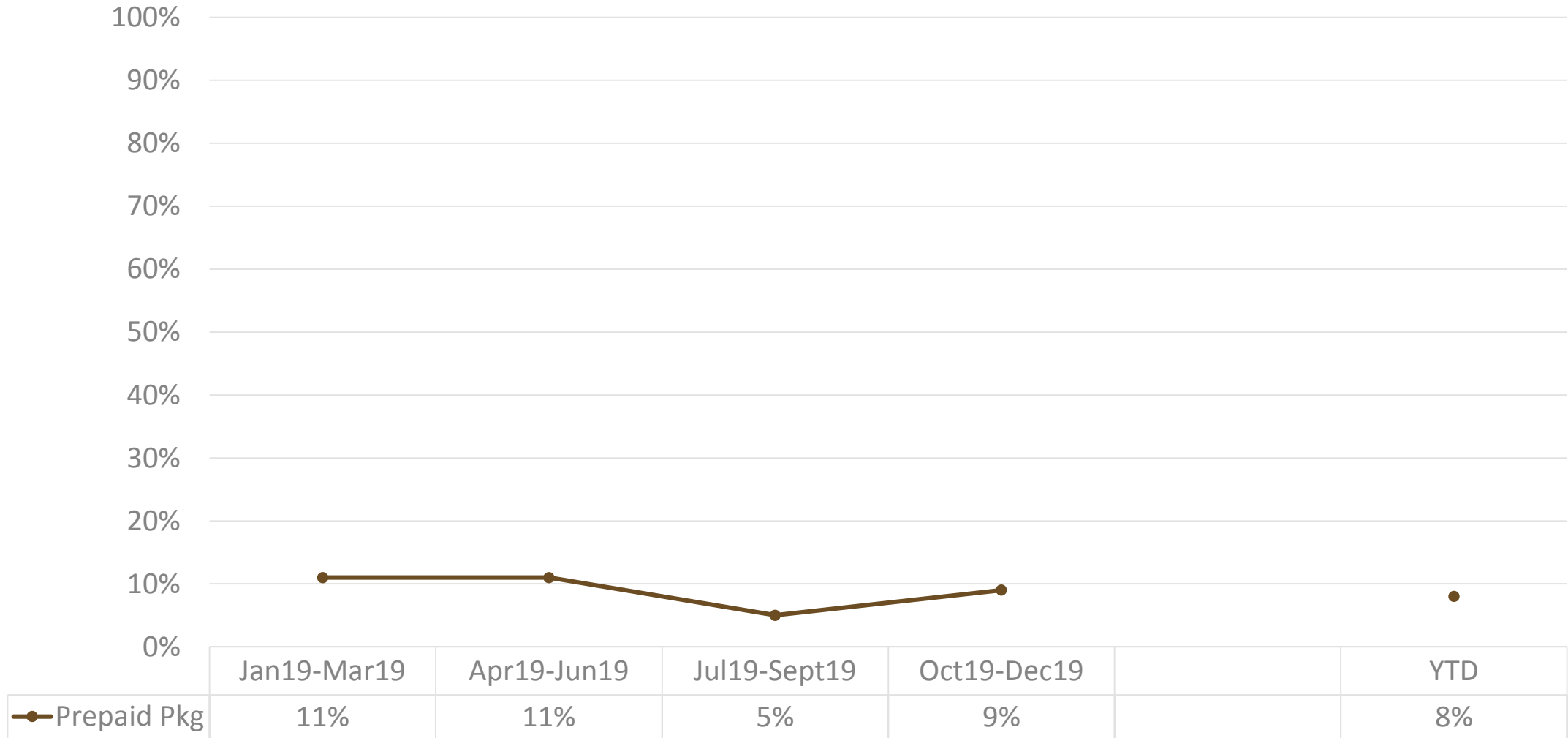
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
Travel Agent	33%	32%	25%	30%		30%
Travel Website	22%	18%	26%	28%		22%
Direct- Airline/ Hotel	45%	50%	48%	49%		48%



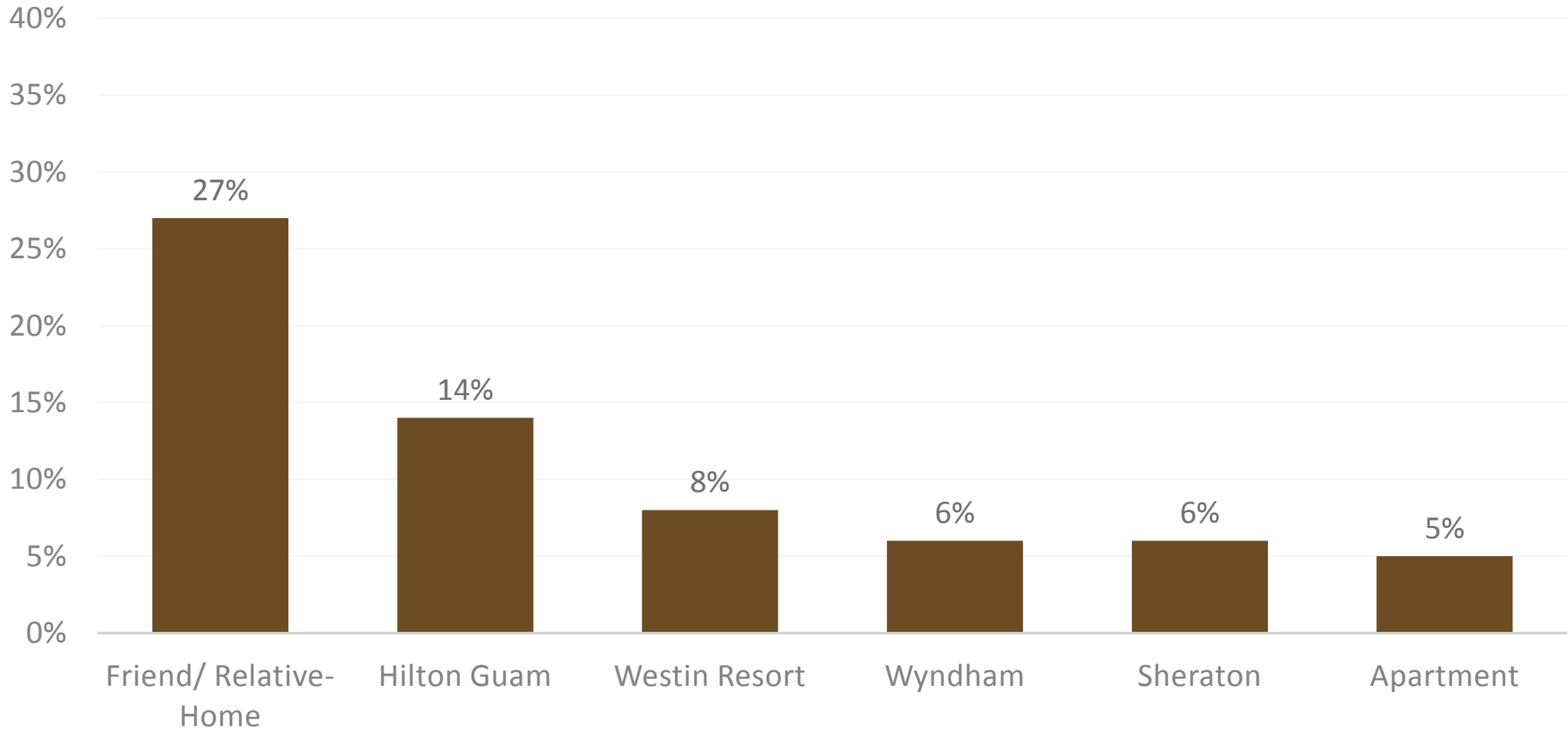
PREPAID PACKAGE TRIP



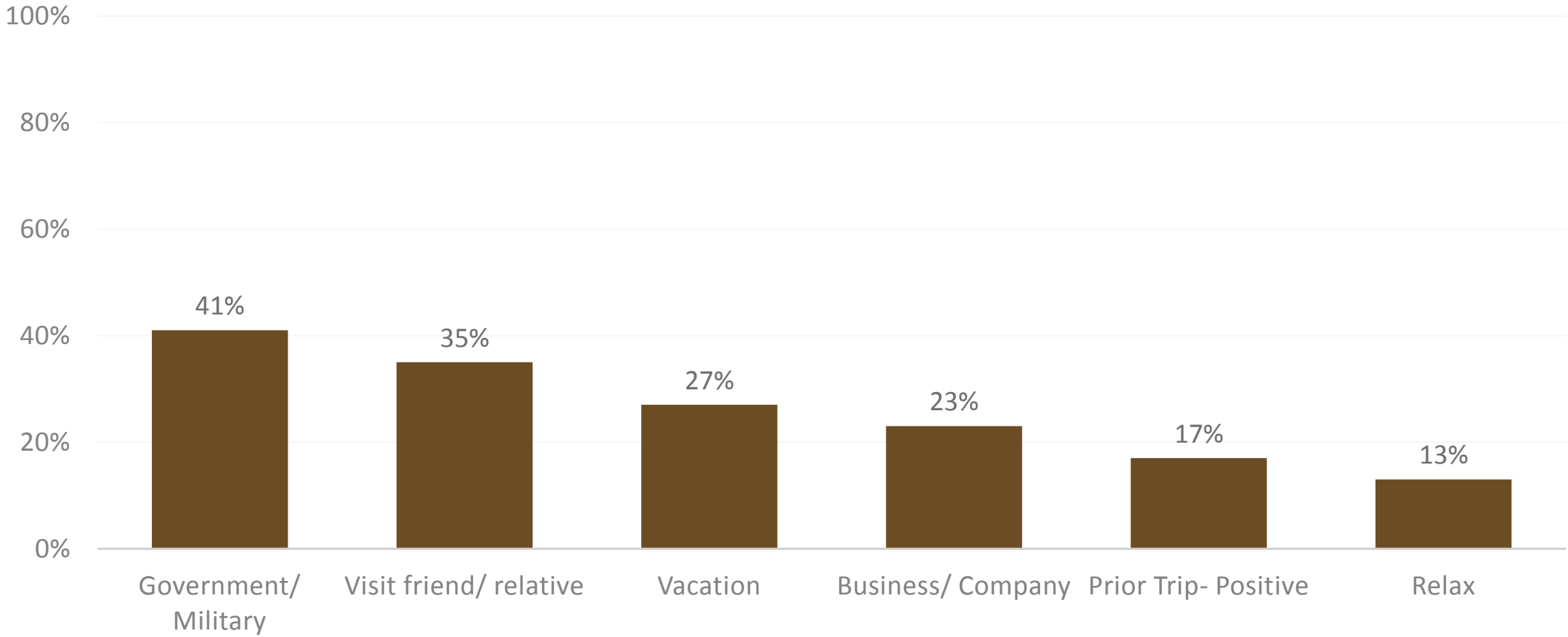
PREPAID PACKAGE TRIP



ACCOMMODATIONS (5%+)



TRAVEL MOTIVATIONS (10%+)





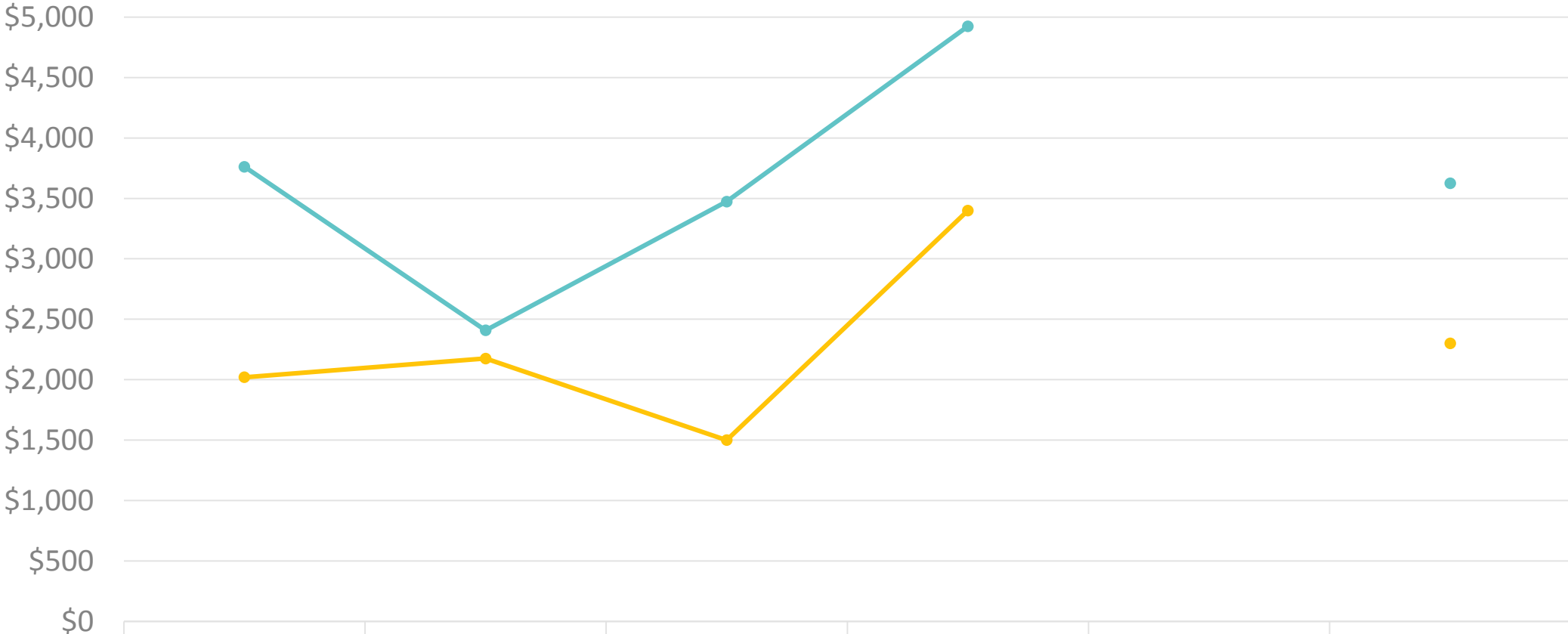
SECTION 3
EXPENDITURES



PREPAID PACKAGE EXPENDITURES

- \$4,924.62 = overall mean average prepaid package expense (for entire travel party) by respondent
- \$3,849.05 = overall mean average **per person** prepaid package expenditures

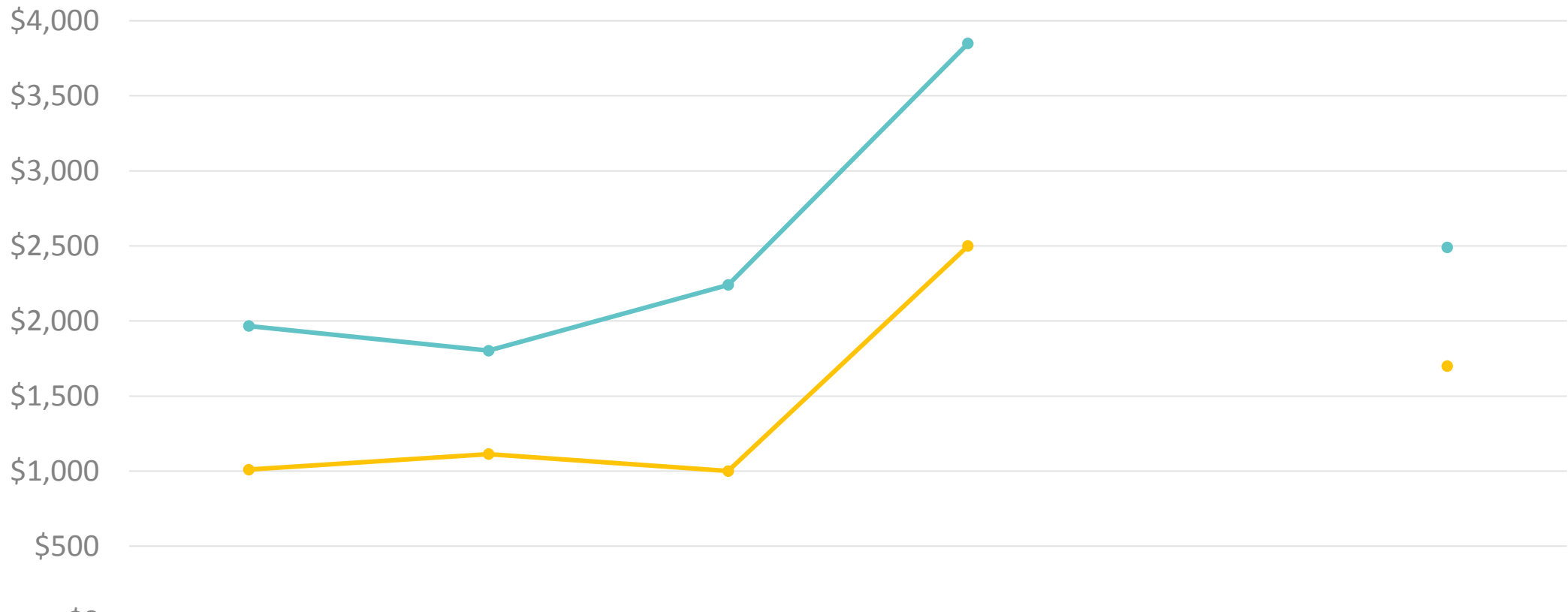
PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
MEAN	\$3,762.27	\$2,407.86	\$3,474.22	\$4,924.62		\$3,625.17
MEDIAN	\$2,020.00	\$2,175.00	\$1,500.00	\$3,400.00		\$2,300.00



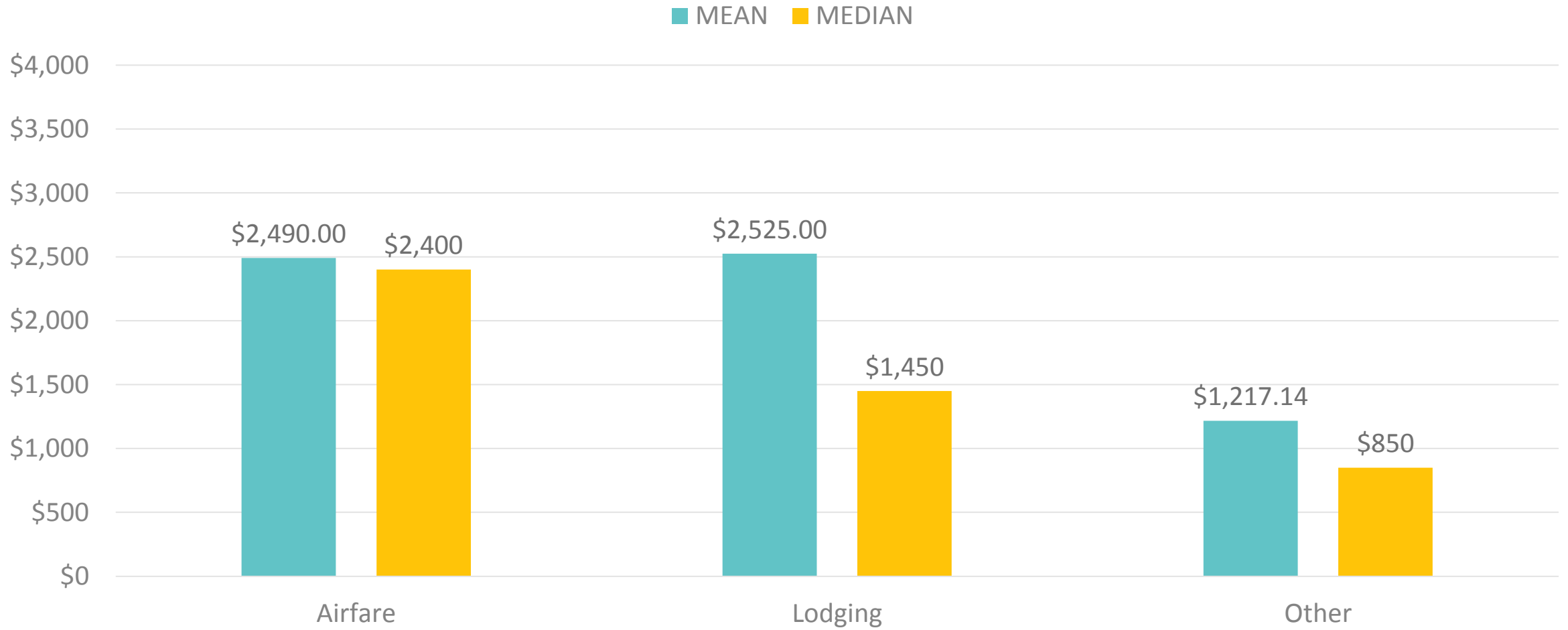
PREPAID PACKAGE – PER PERSON EXPENSE TRACKING



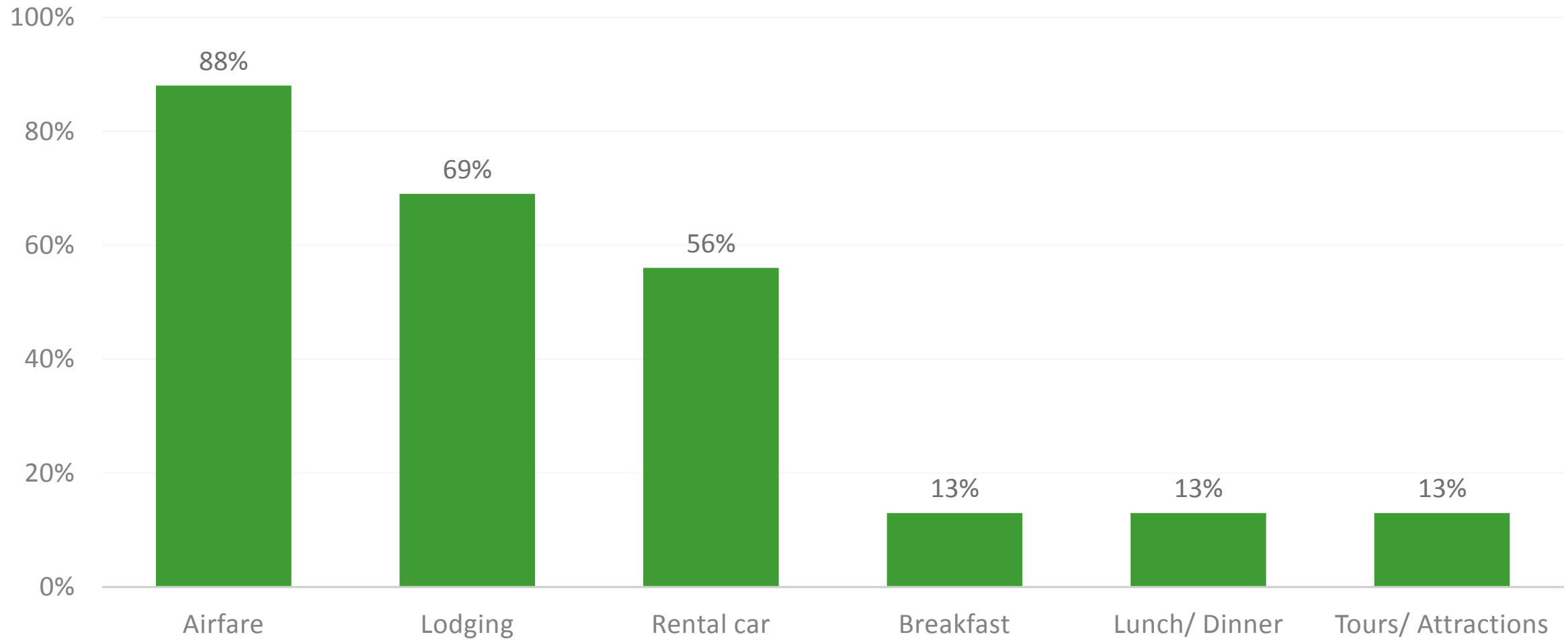
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
MEAN	\$1,966.52	\$1,802.76	\$2,240.40	\$3,849.05		\$2,490.88
MEDIAN	\$1,010.00	\$1,113.00	\$1,000.00	\$2,500.00		\$1,700.00



PREPAID PACKAGE – BREAKDOWN



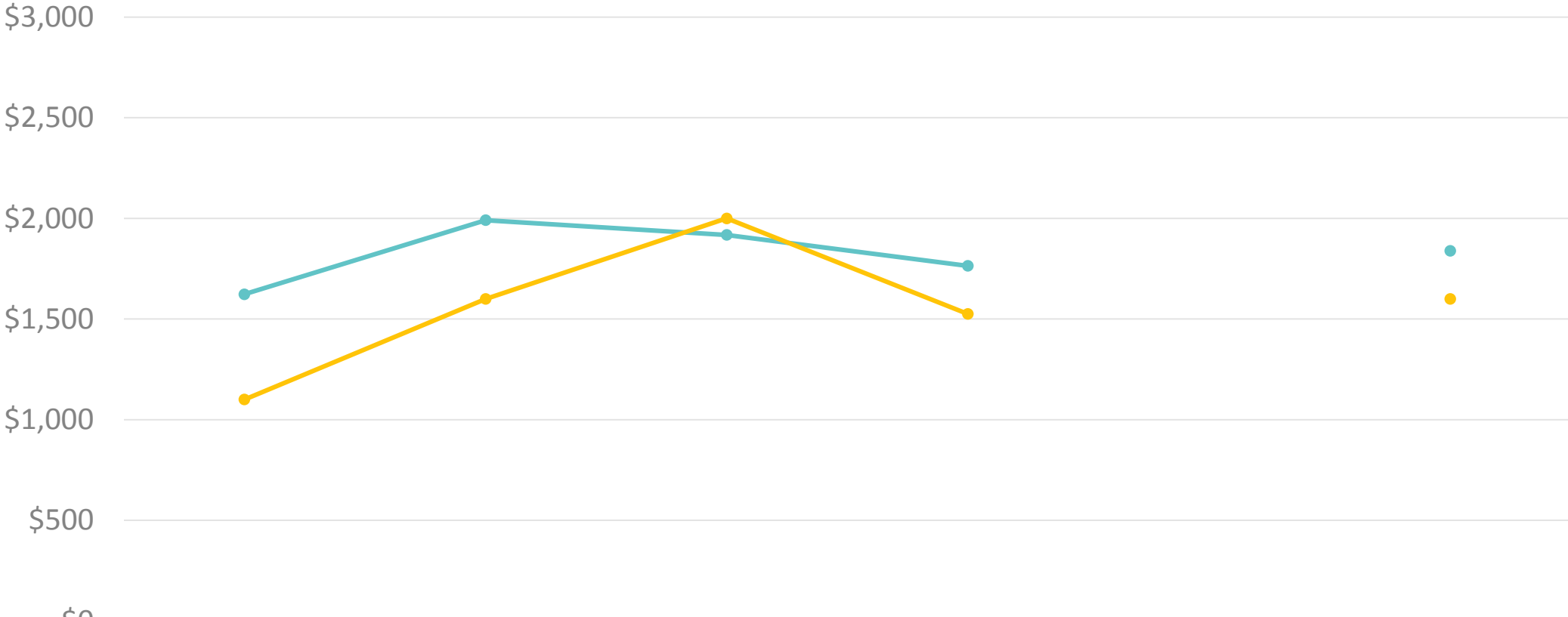
PREPAID PACKAGE – BREAKDOWN



AIRFARE – FIT TRAVELER

- \$1,764.36 = overall mean average airfare expense (for entire travel party) by respondent
- \$1,502.03 = overall mean average **per person** airfare expenditures

AIRFARE – FIT TRAVELER (GROUP) TRACKING

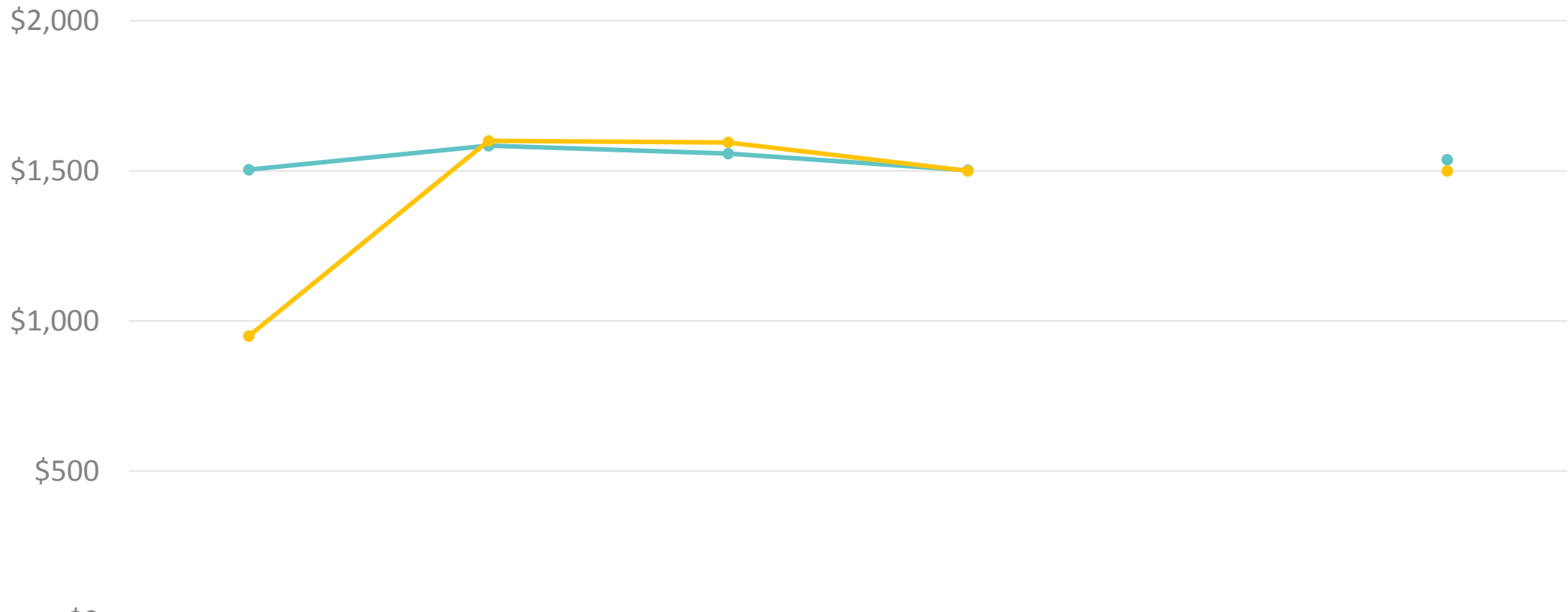


	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
MEAN	\$1,623.45	\$1,991.05	\$1,917.95	\$1,764.36		\$1,838.67
MEDIAN	\$1,100.00	\$1,600.00	\$2,000.00	\$1,525.00		\$1,600.00

Q: How much in total did you and your family/ travel party pay for the airline trip costs to Guam (if not included as part of a package)?



AIRFARE – FIT TRAVELER (Per Person) TRACKING



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
MEAN	\$1,504.05	\$1,584.21	\$1,557.65	\$1,502.03		\$1,537.76
MEDIAN	\$950.00	\$1,600.00	\$1,595.00	\$1,500.00		\$1,500.00

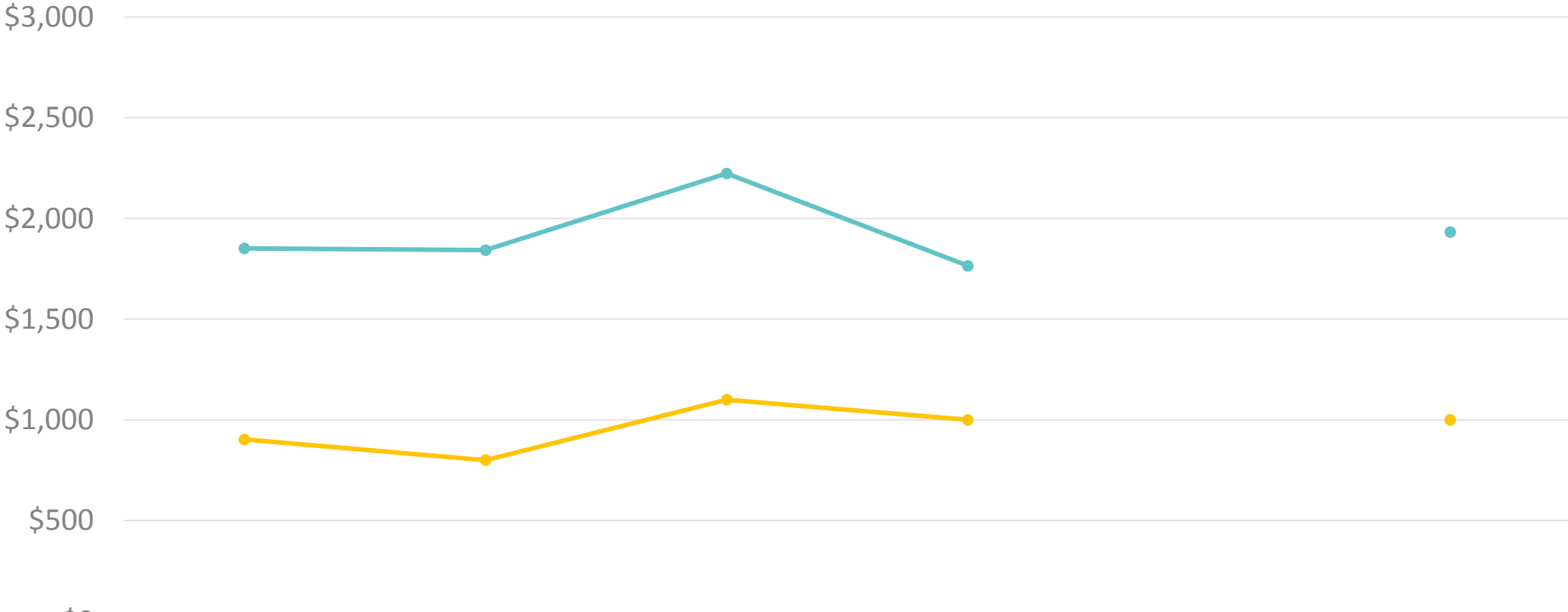
Q: How much in total did you and your family/ travel party pay for the airline trip costs to Guam (if not included as part of a package)?



ONISLE EXPENDITURES

- \$1,764.73 = overall mean average expense (for entire travel party) by respondent
- \$1,363.56 = overall mean average **per person** expenditures

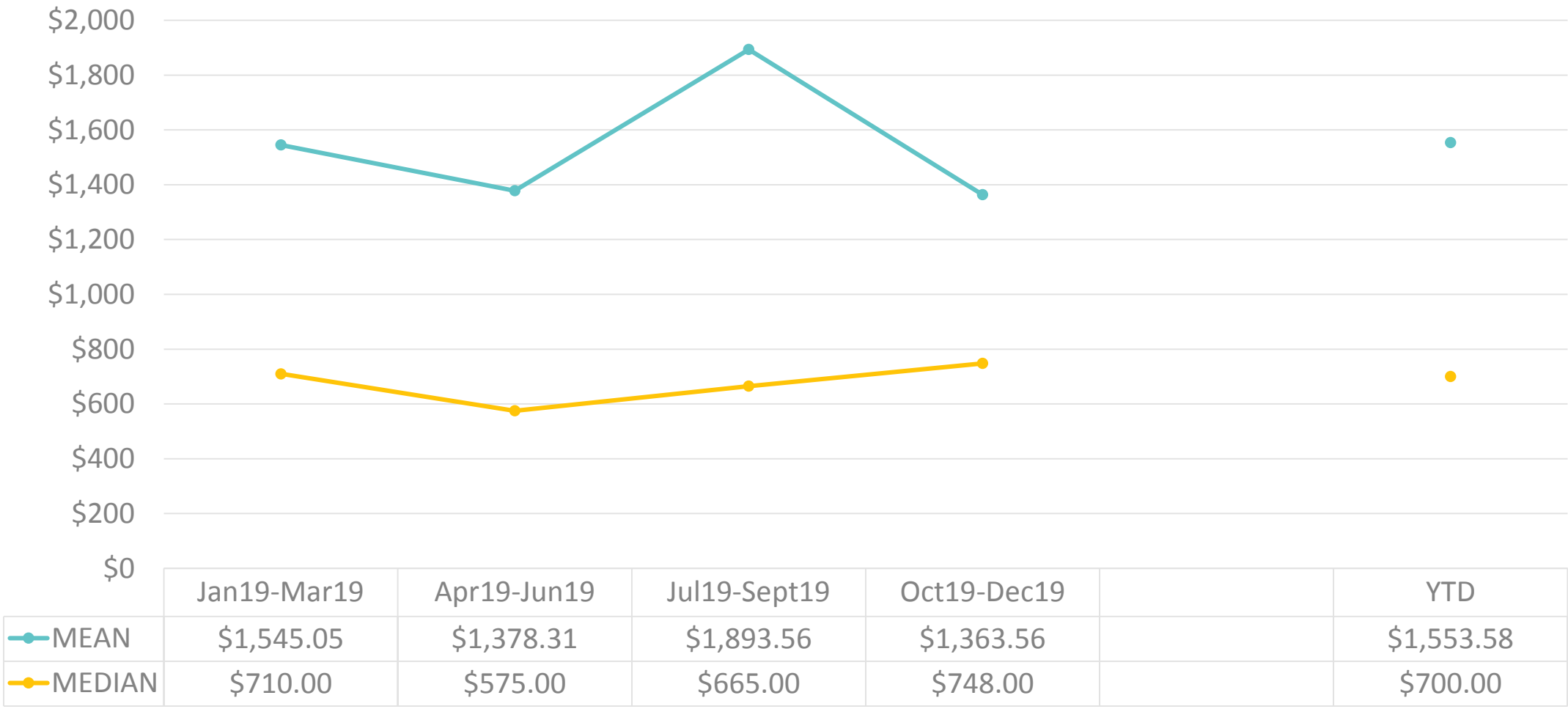
ONISLE – TRAVEL PARTY TRACKING



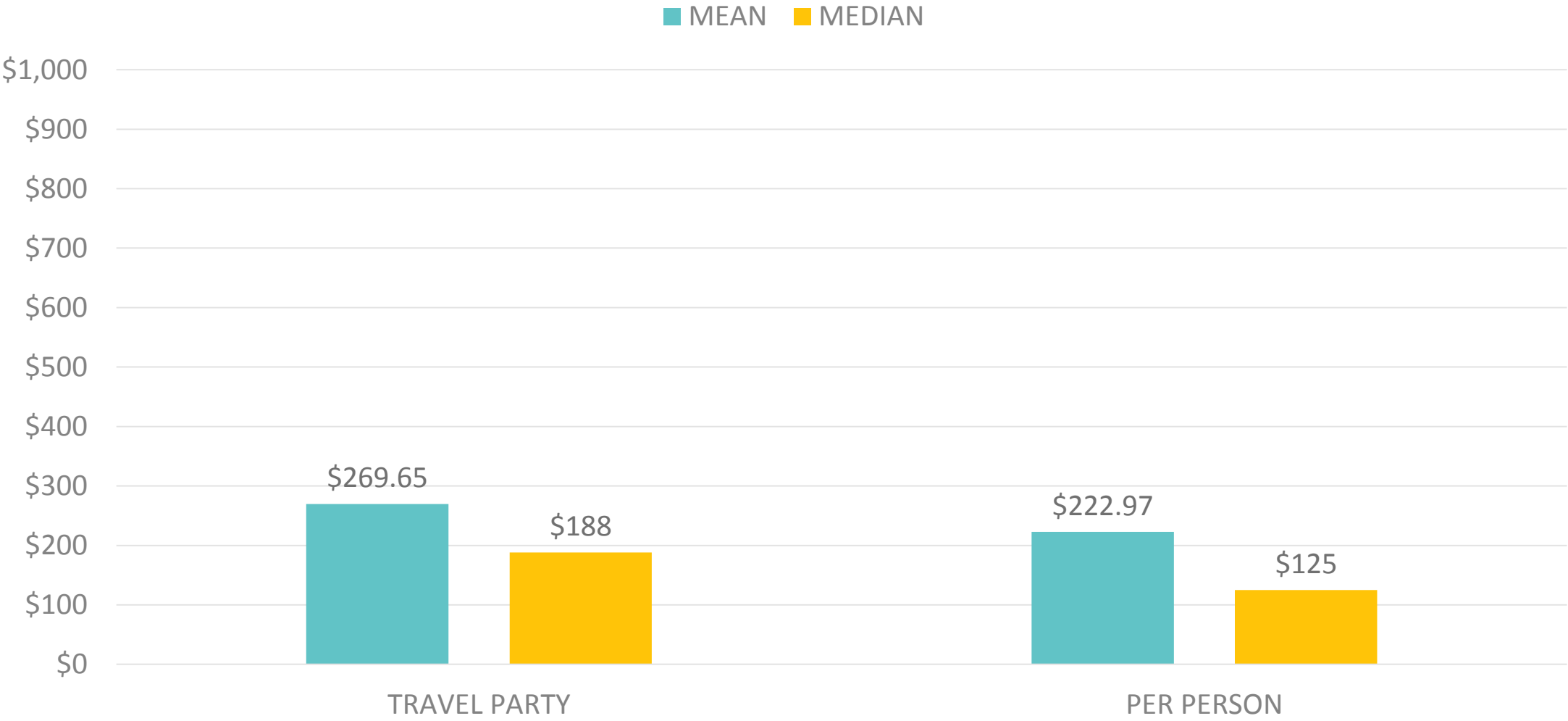
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
MEAN	\$1,851.59	\$1,842.78	\$2,223.40	\$1,764.73		\$1,932.16
MEDIAN	\$903.00	\$800.00	\$1,100.00	\$1,000.00		\$1,000.00



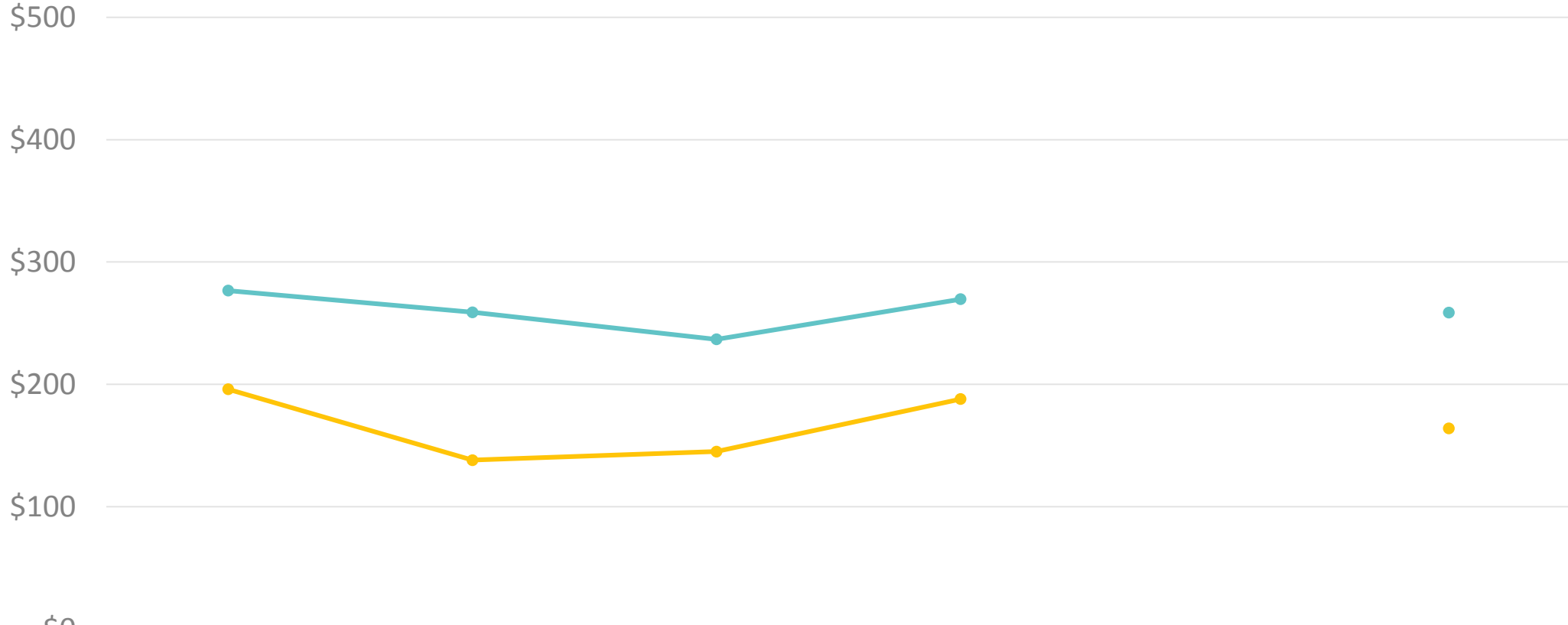
ONISLE – PER PERSON TRACKING



ONISLE – PER DAY SPENDING



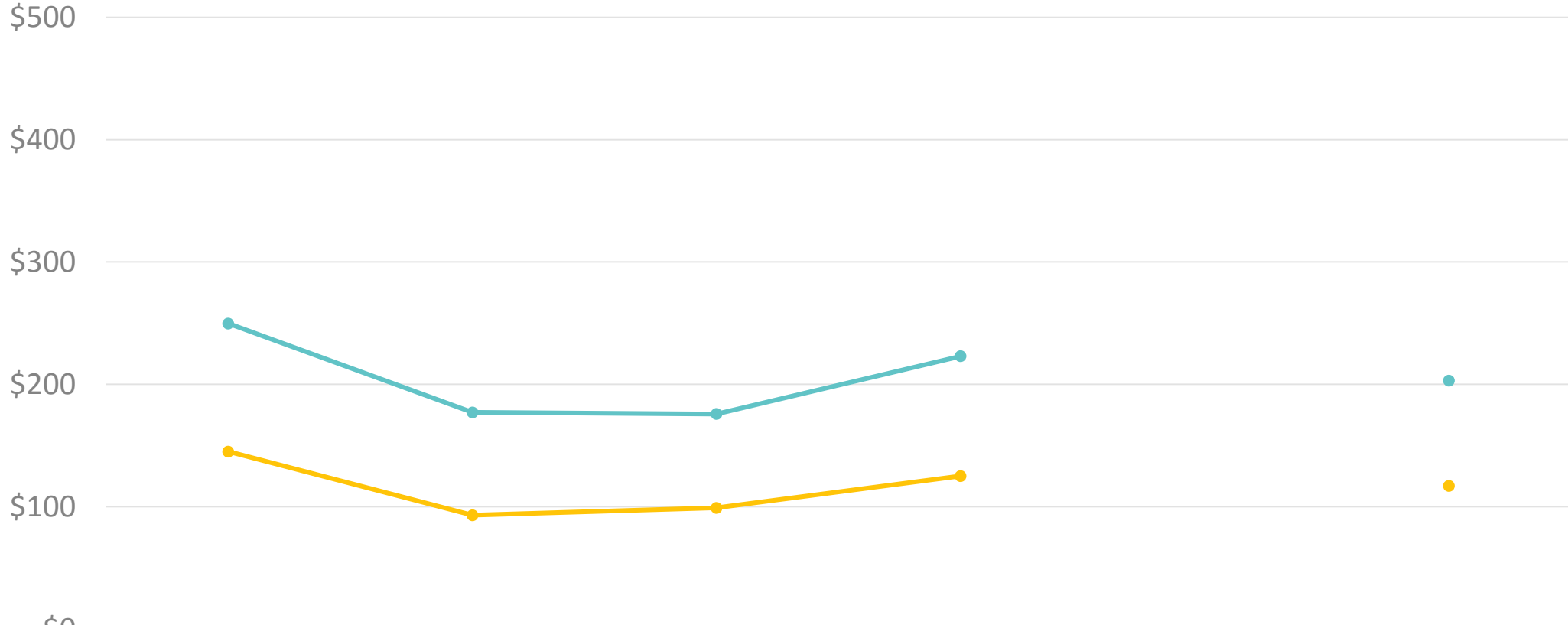
ONISLE – TRAVEL PARTY/ PER DAY TRACKING



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
MEAN	\$276.61	\$258.88	\$236.80	\$269.65		\$258.64
MEDIAN	\$196.00	\$138.00	\$145.00	\$188.00		\$164.00



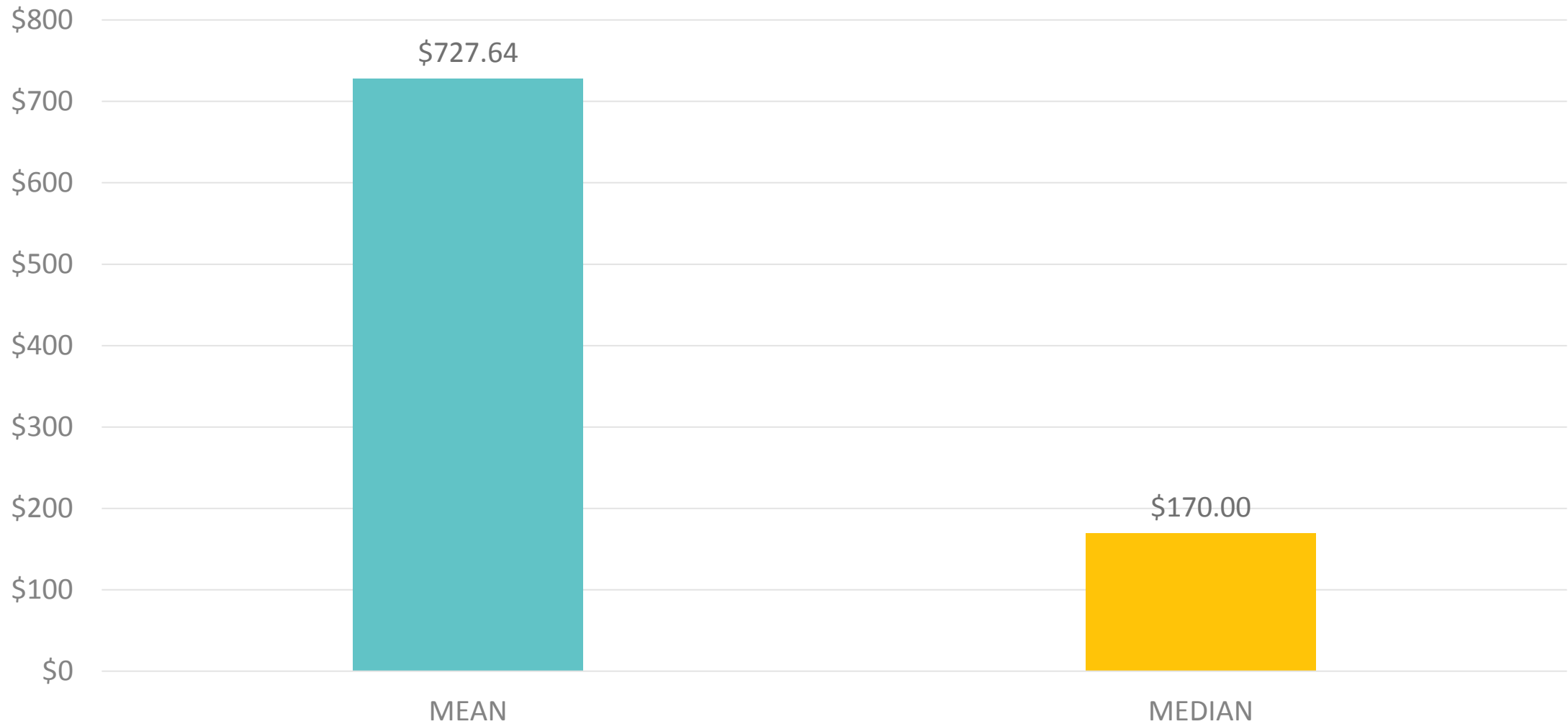
ONISLE – PER PERSON/ PER DAY TRACKING



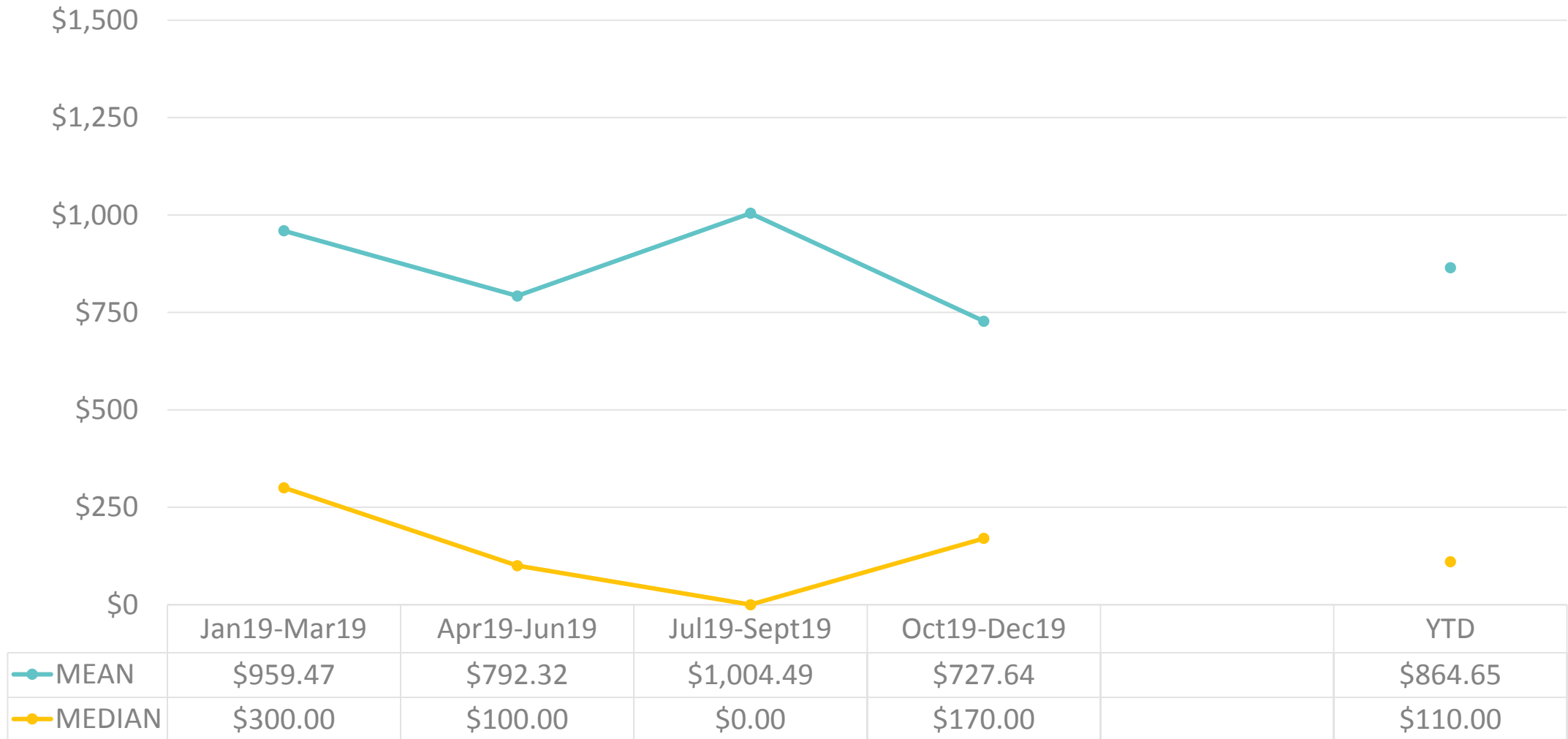
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
MEAN	\$249.75	\$177.06	\$175.80	\$222.97		\$203.04
MEDIAN	\$145.00	\$93.00	\$99.00	\$125.00		\$117.00



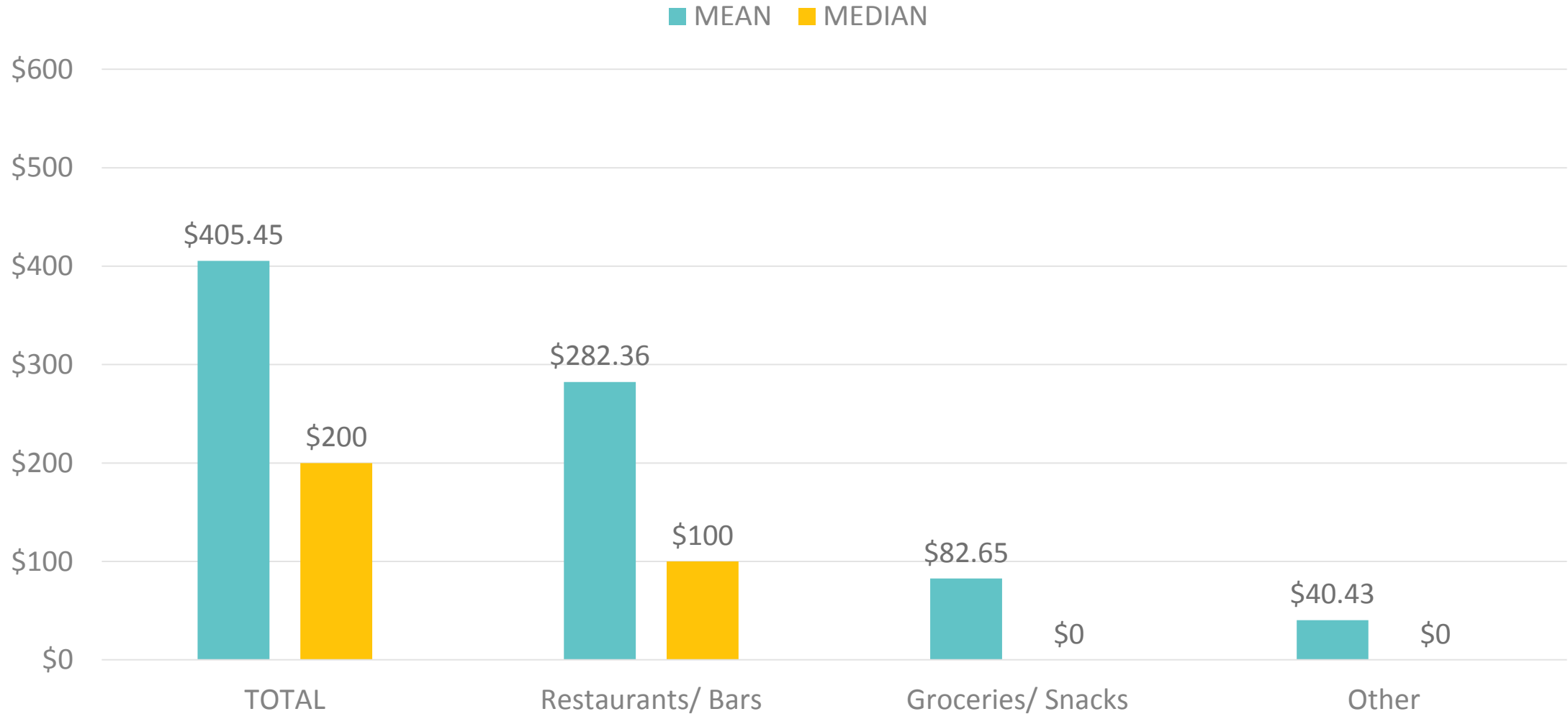
ONISLE – ACCOMMODATIONS



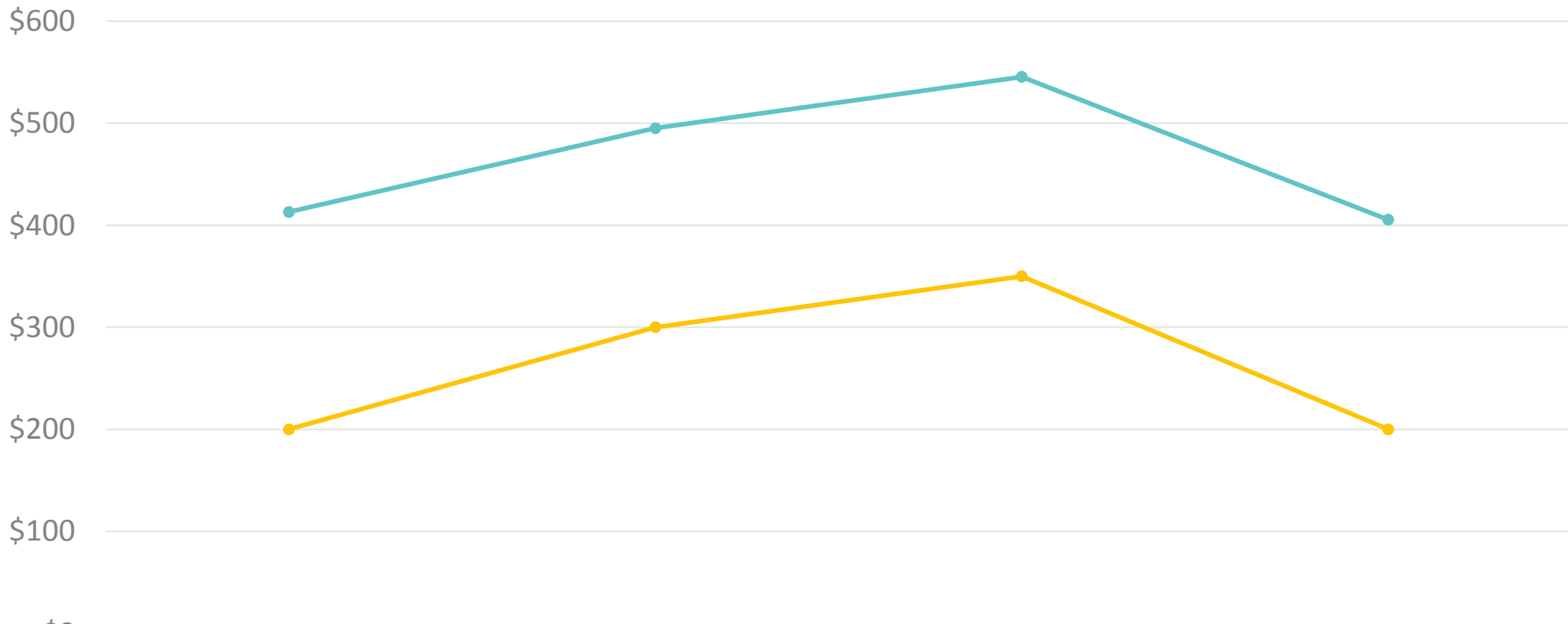
ONISLE – ACCOMMODATIONS TRACKING



ONISLE – FOOD & BEVERAGE



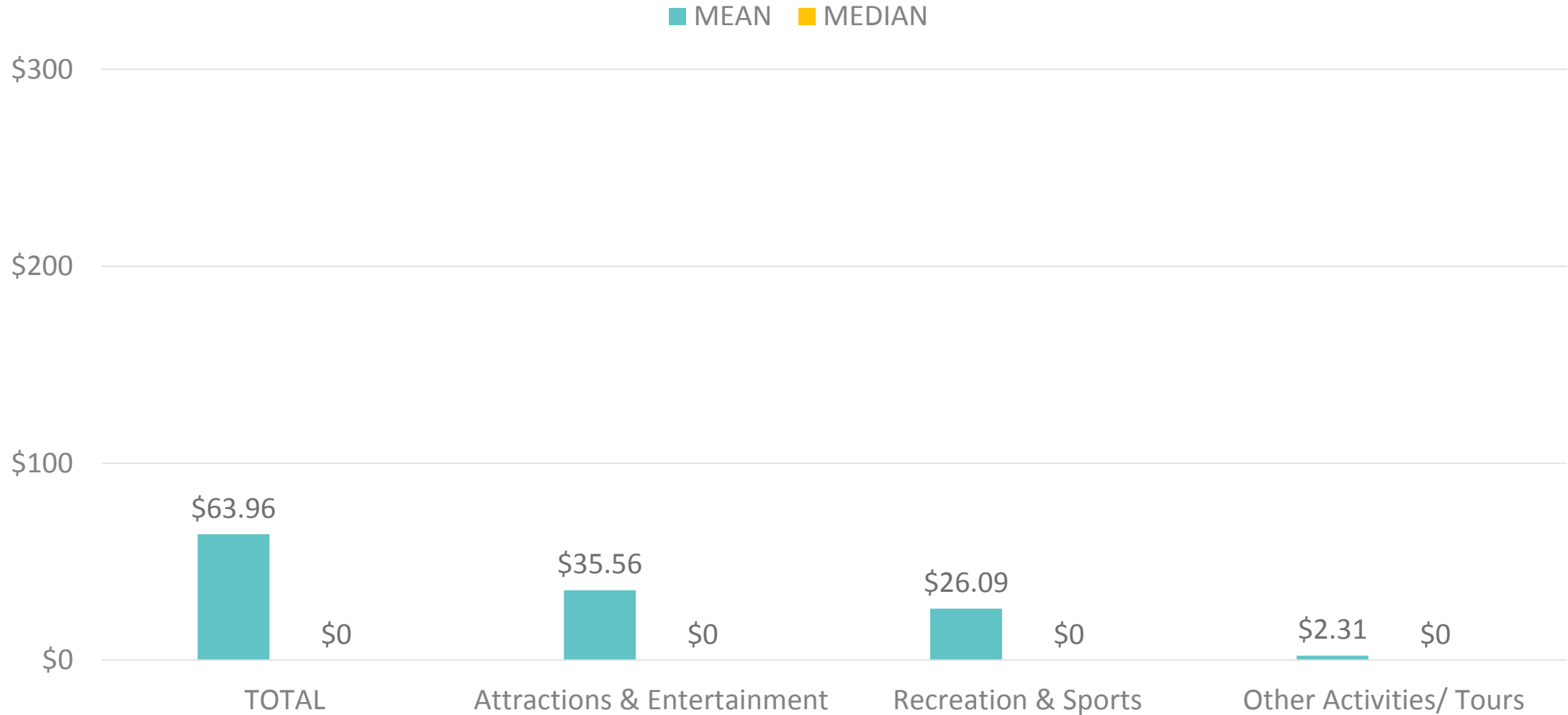
ONISLE – TOTAL FOOD & BEVERAGE TRACKING



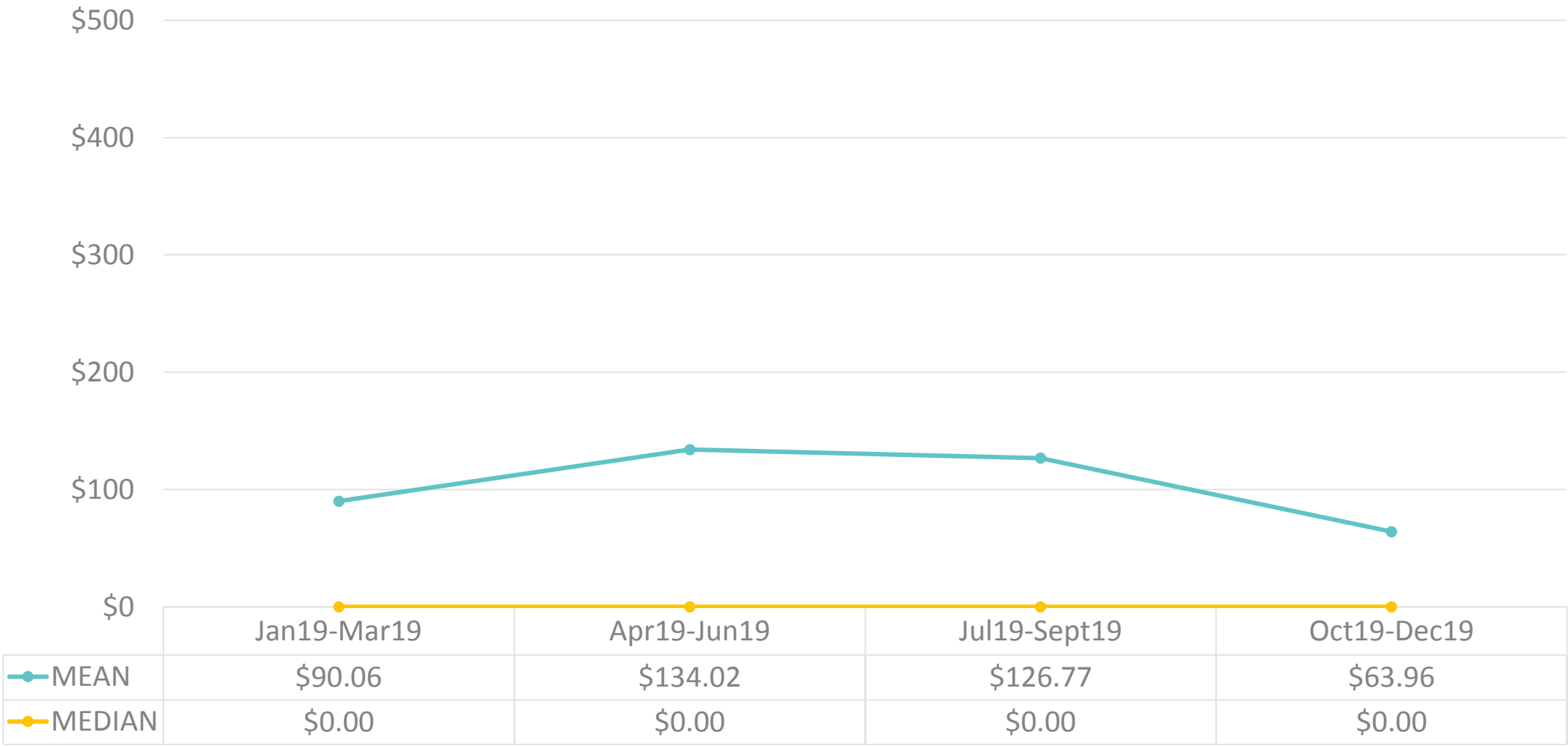
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19
MEAN	\$412.97	\$495.17	\$545.40	\$405.45
MEDIAN	\$200.00	\$300.00	\$350.00	\$200.00



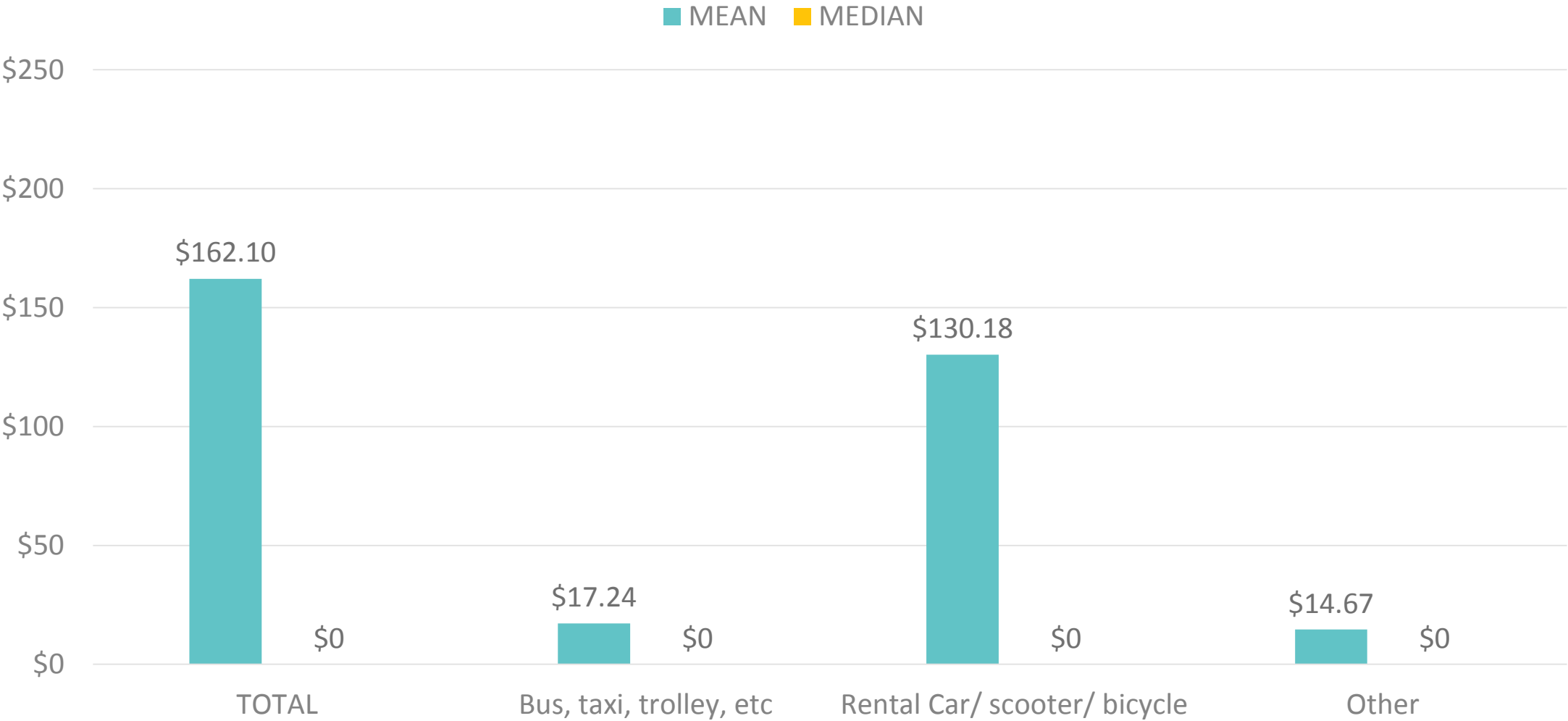
ONISLE – ENTERTAINMENT & RECREATION



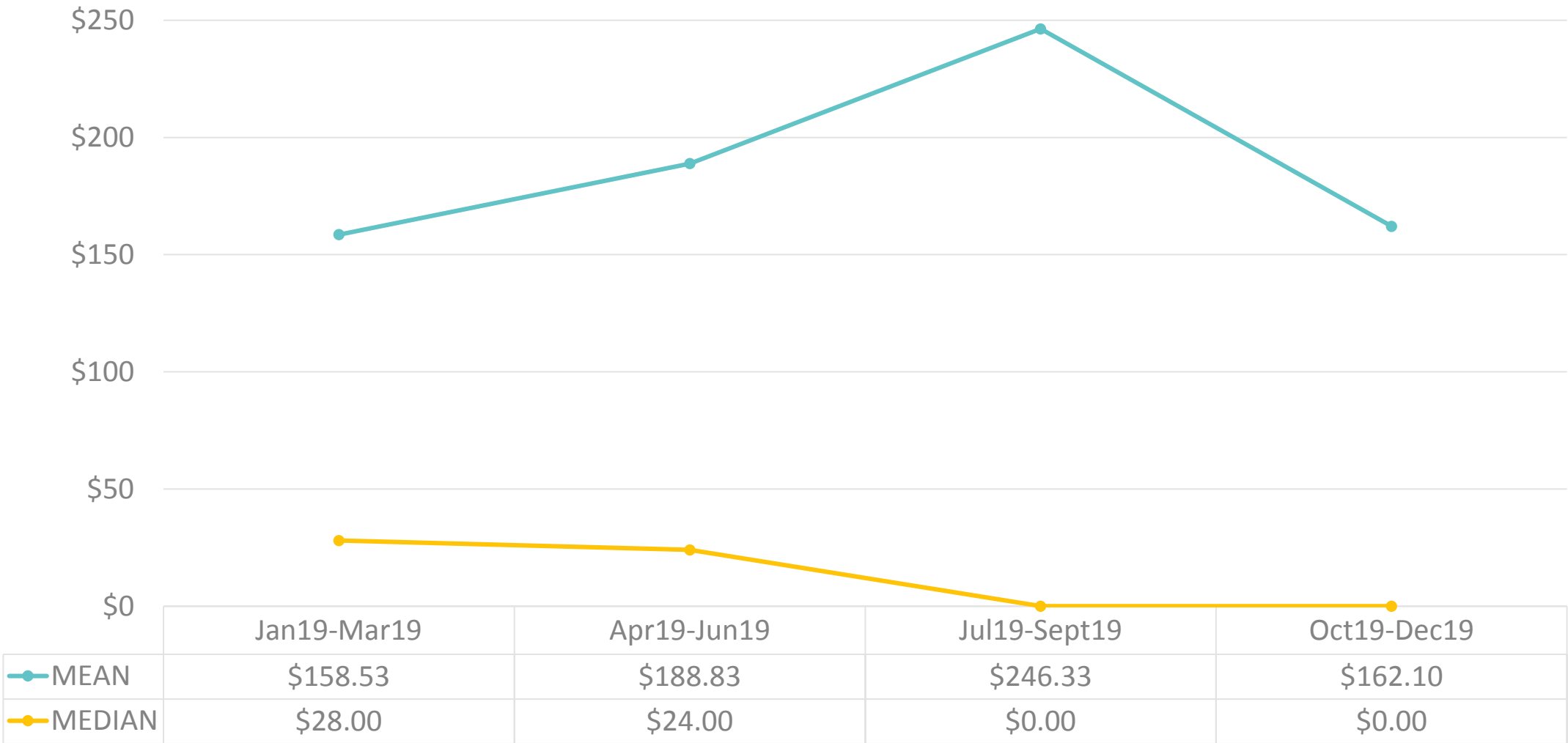
ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING



ONISLE – TRANSPORTATION

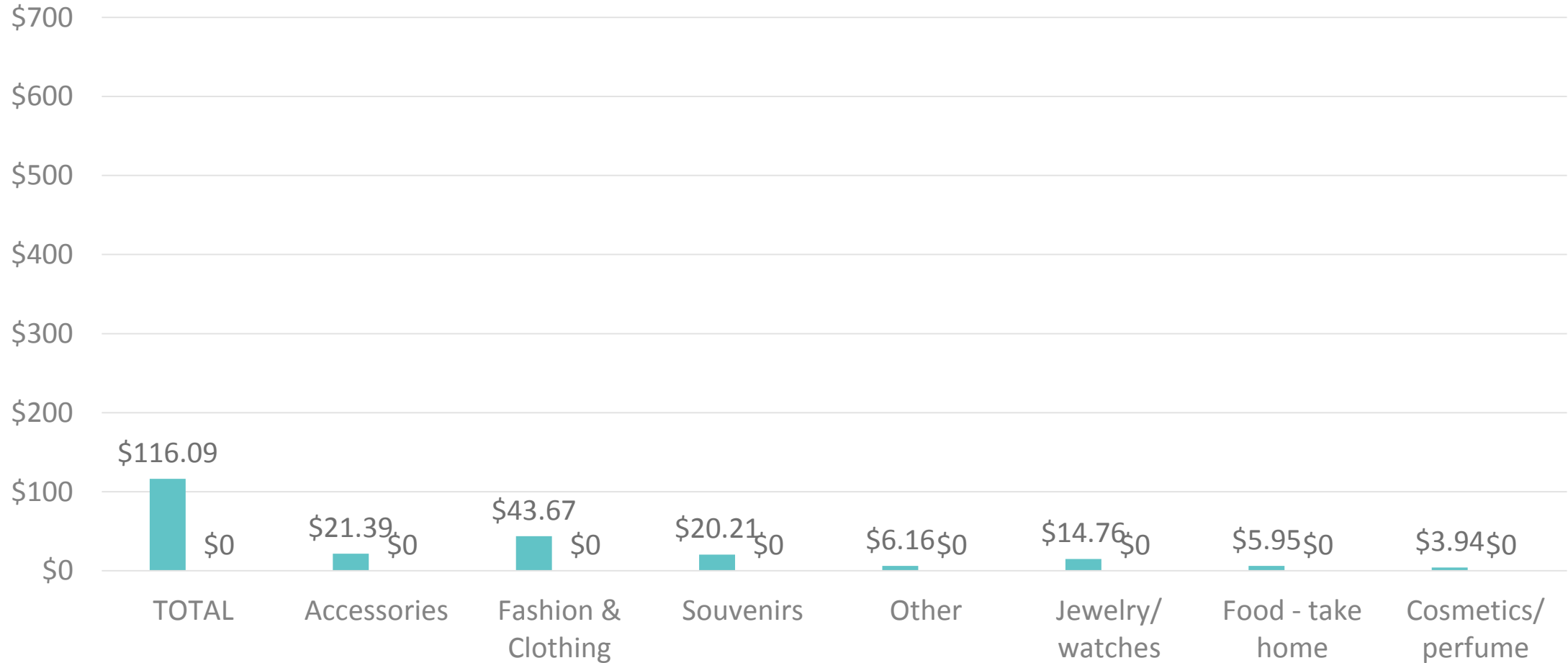


ONISLE – TOTAL TRANSPORTATION TRACKING

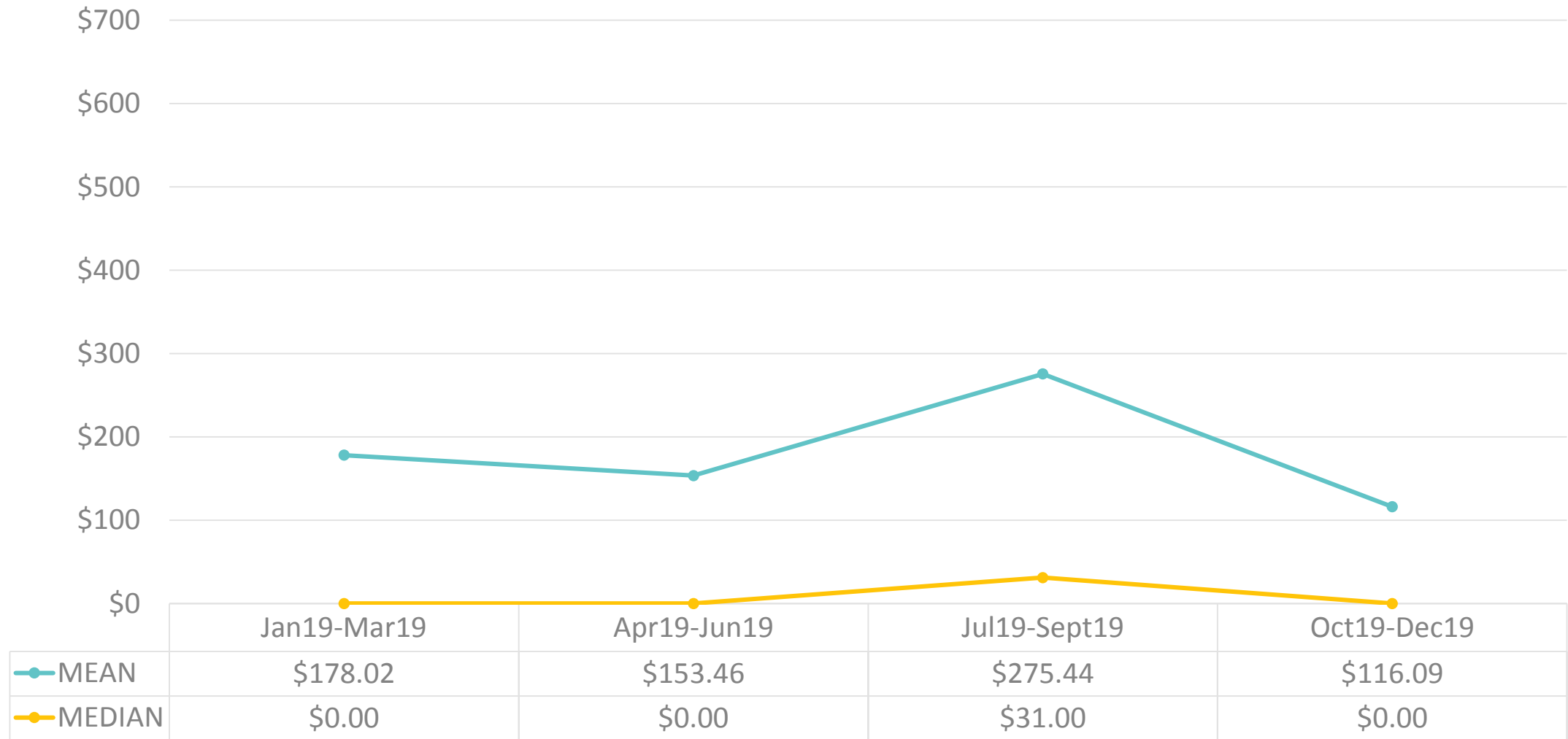


ONISLE – SHOPPING

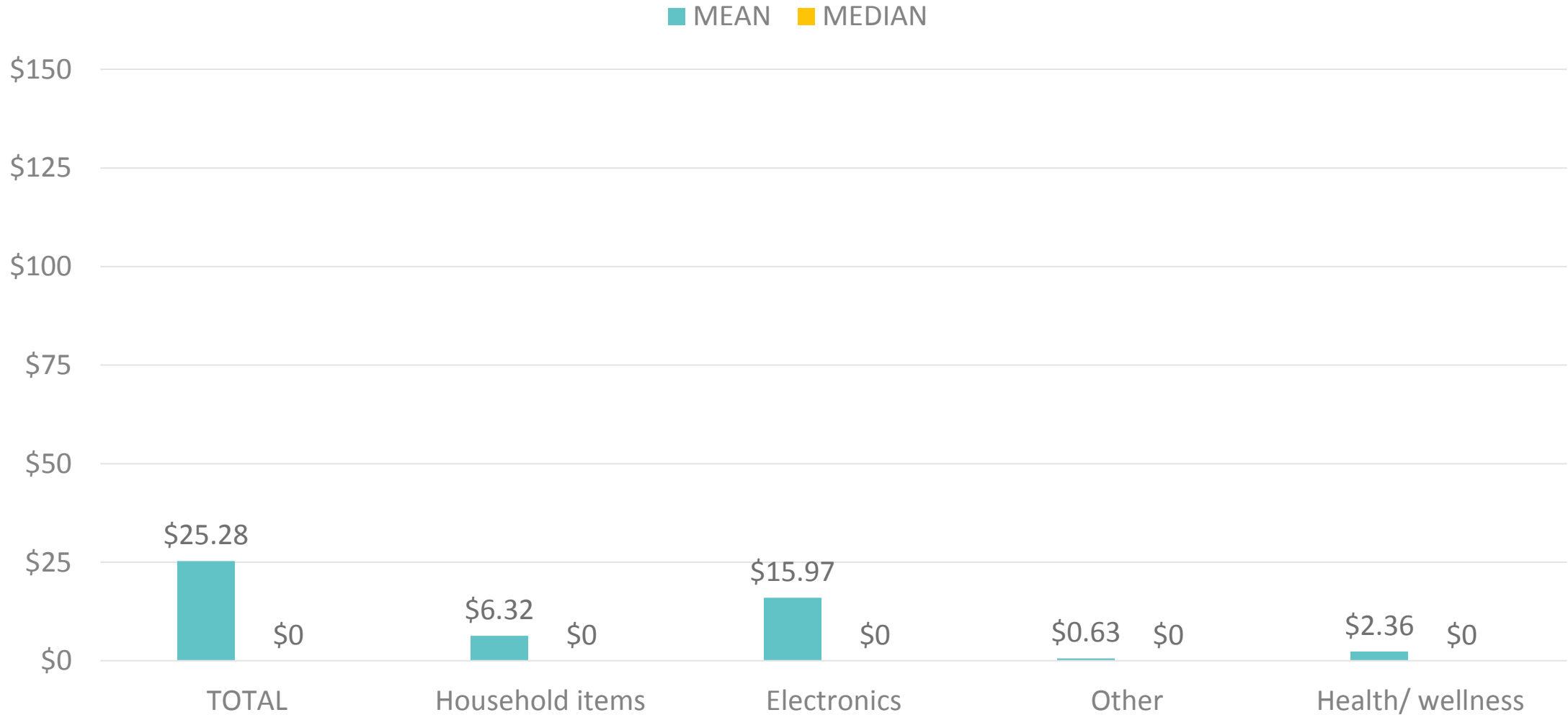
■ MEAN ■ MEDIAN



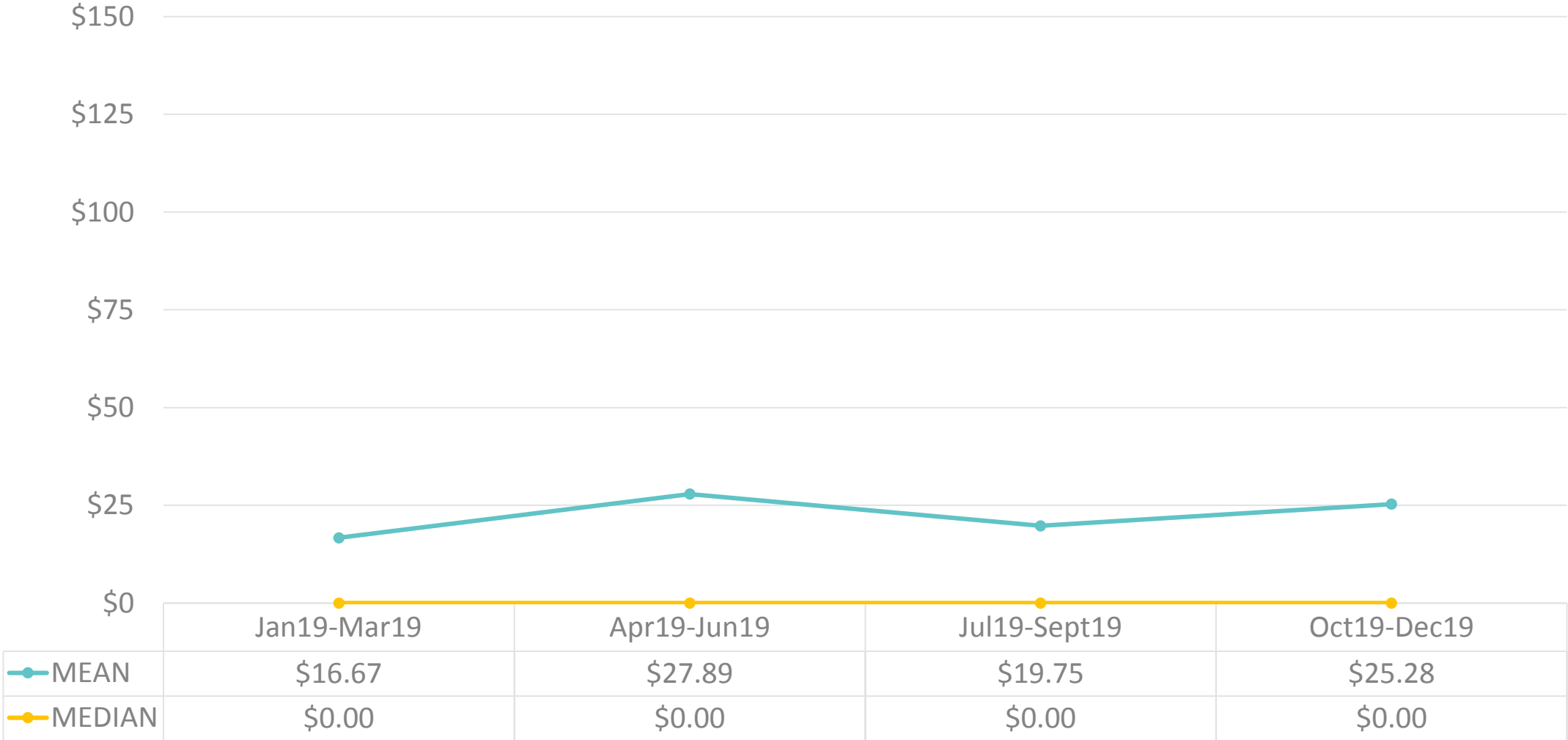
ONISLE – TOTAL SHOPPING TRACKING



ONISLE – MISCELLANEOUS



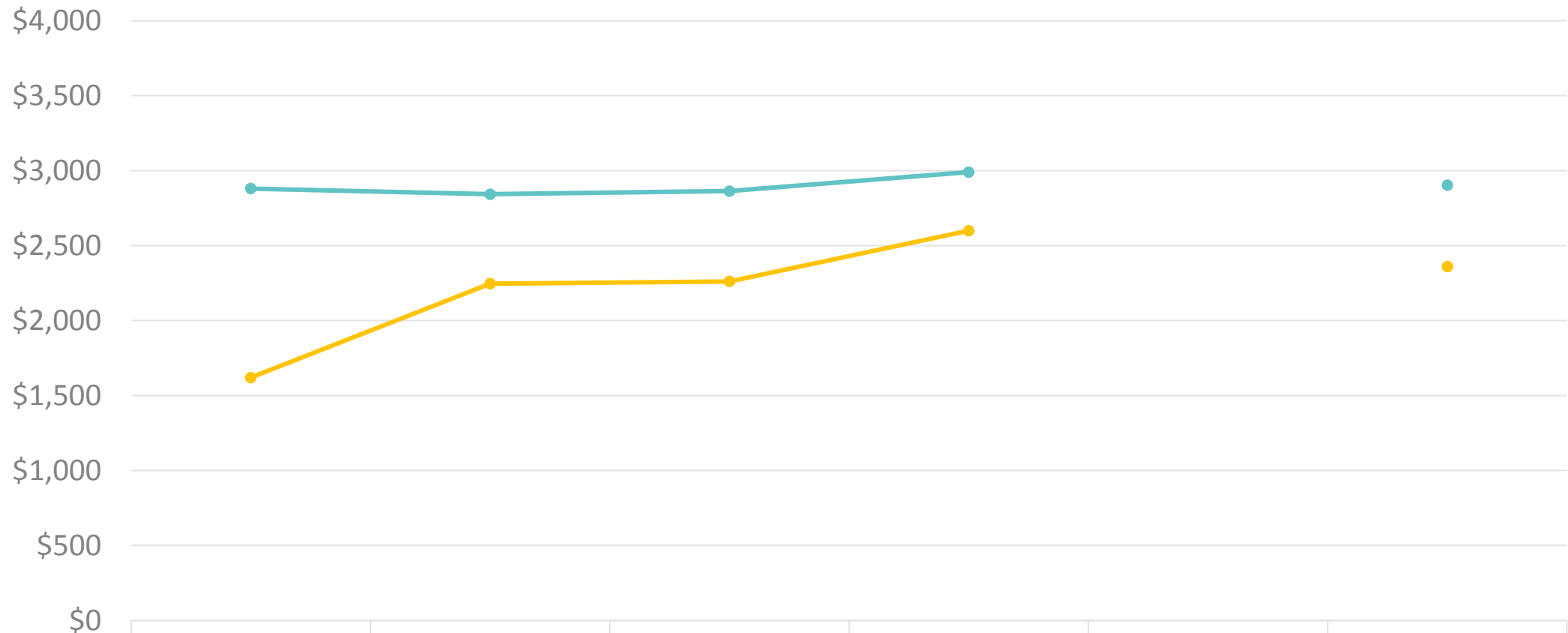
ONISLE – MISCELLANEOUS TRACKING



TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

- \$2,990.60 = Mean average per person
- \$2,600.00 = Median amount spent per person

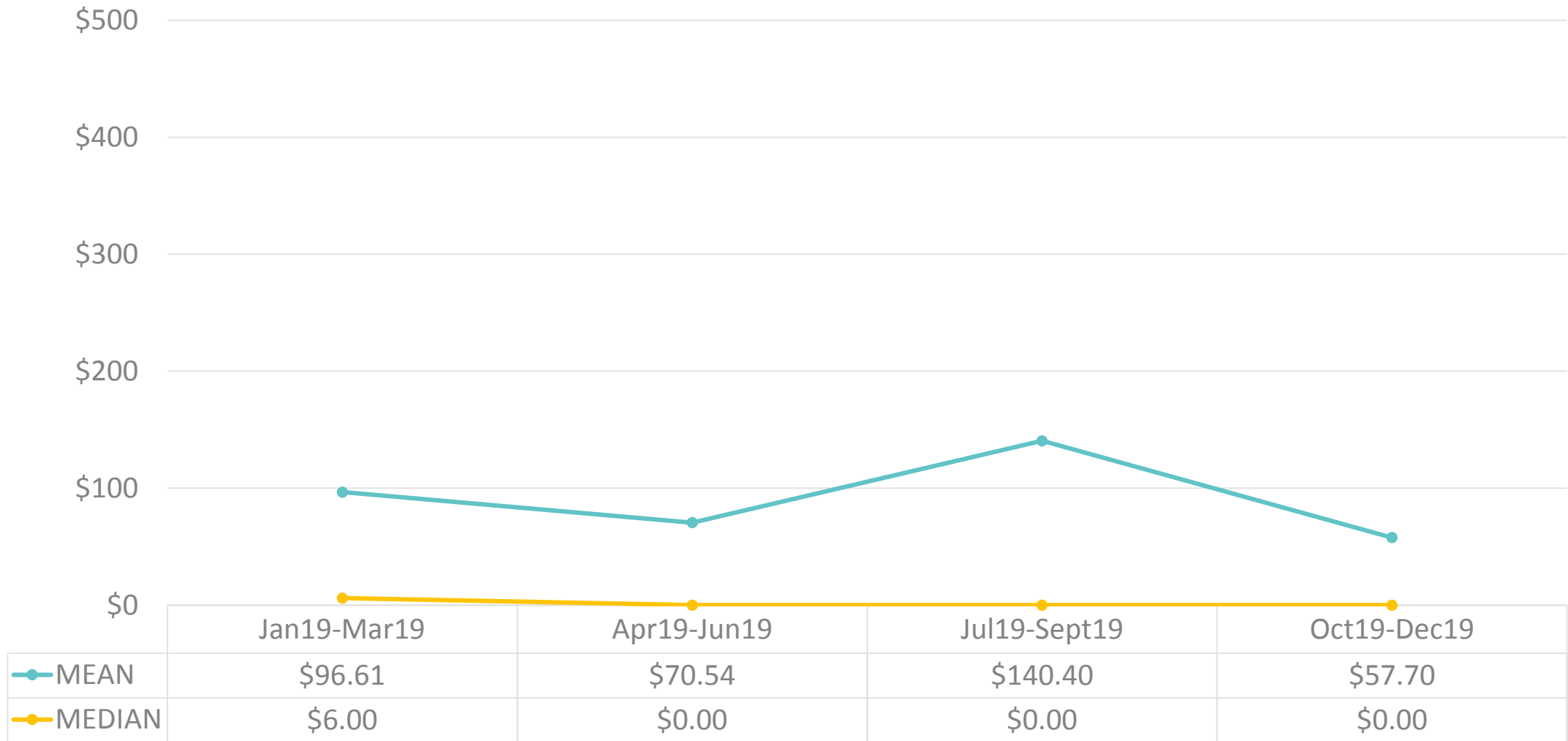
TOTAL EXPENDITURES PER PERSON TRACKING



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
MEAN	\$2,880.46	\$2,843.20	\$2,863.78	\$2,990.60		\$2,903.70
MEDIAN	\$1,620.00	\$2,247.00	\$2,261.00	\$2,600.00		\$2,360.00



GUAM AIRPORT EXPENDITURE TRACKING



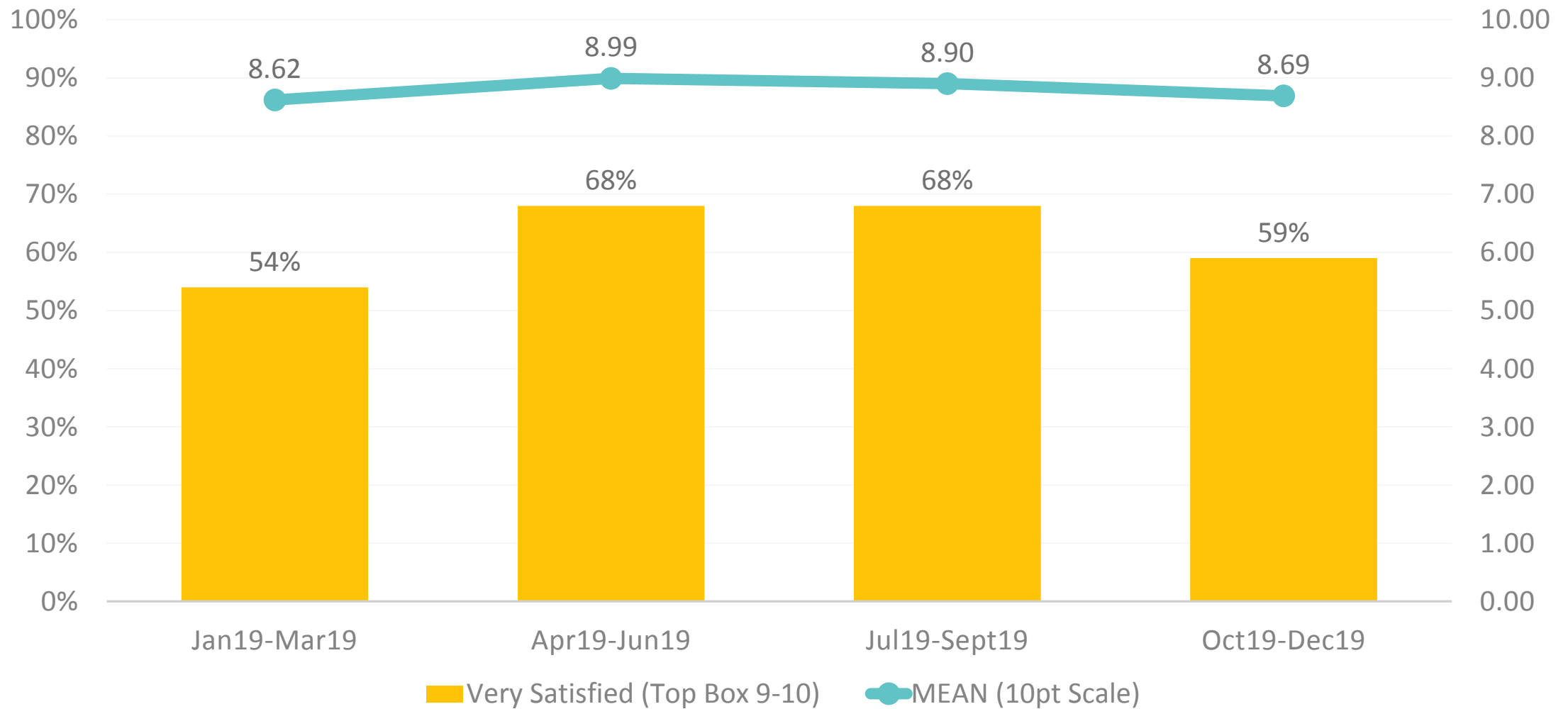


SECTION 4

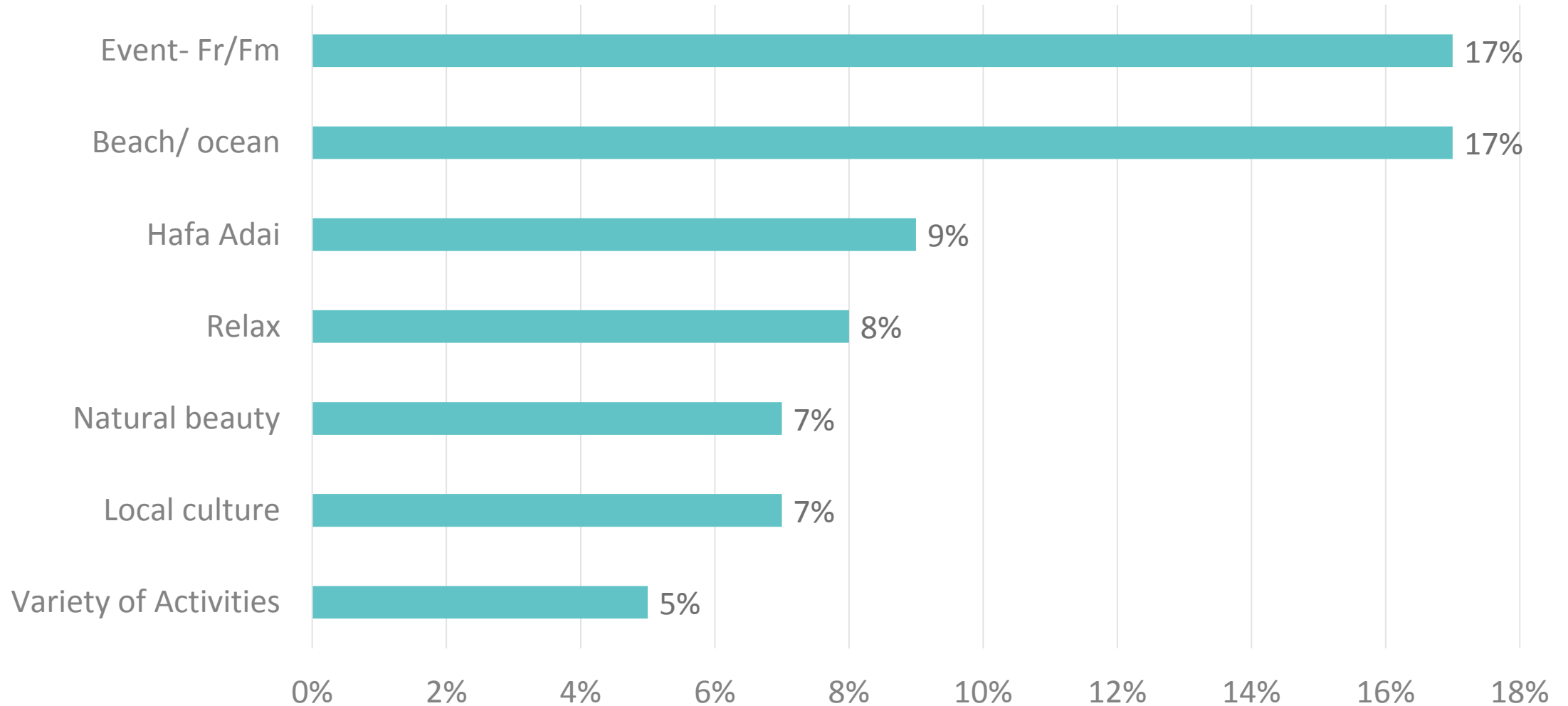
VISITOR SATISFACTION



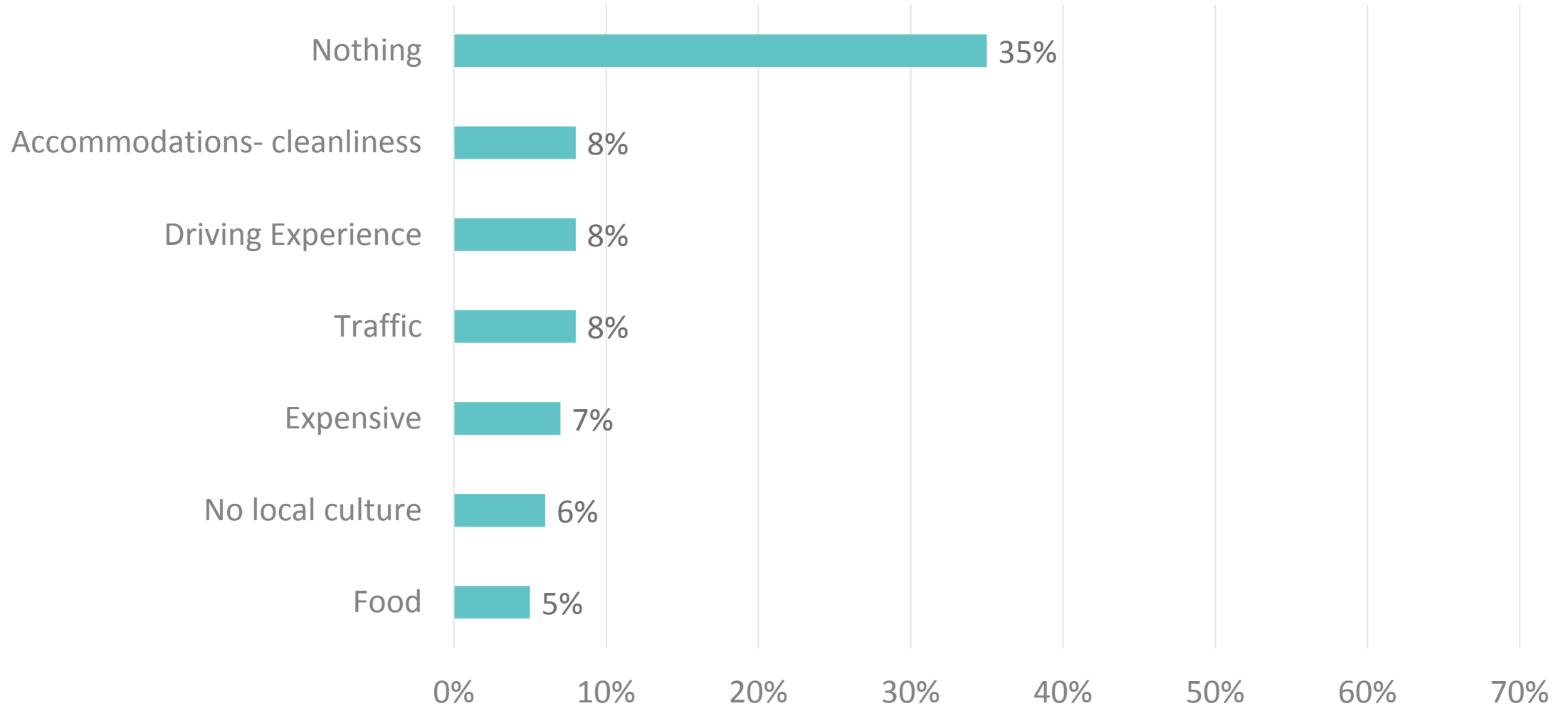
OVERALL SATISFACTION – 10PT SCALE



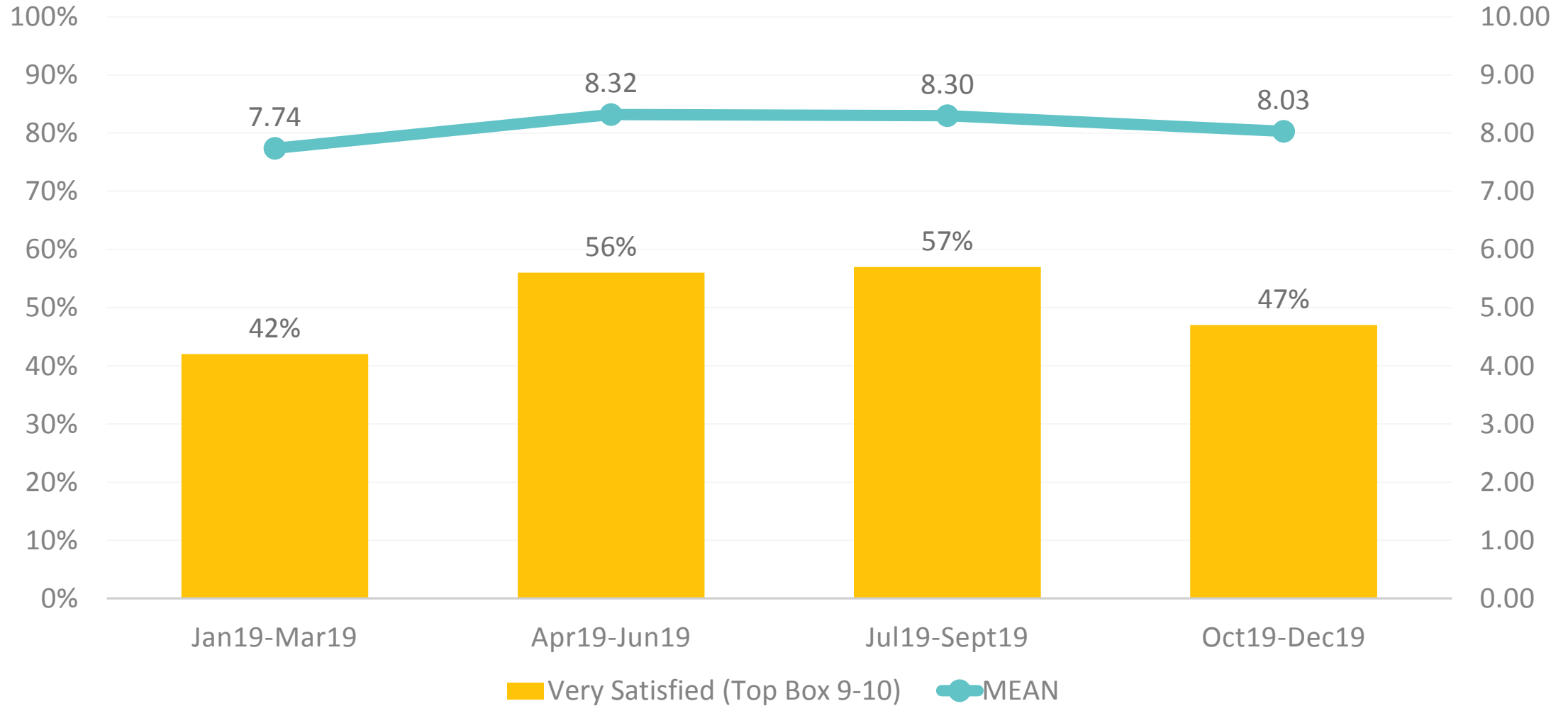
SWOT – POSITIVE ASPECT OF TRIP



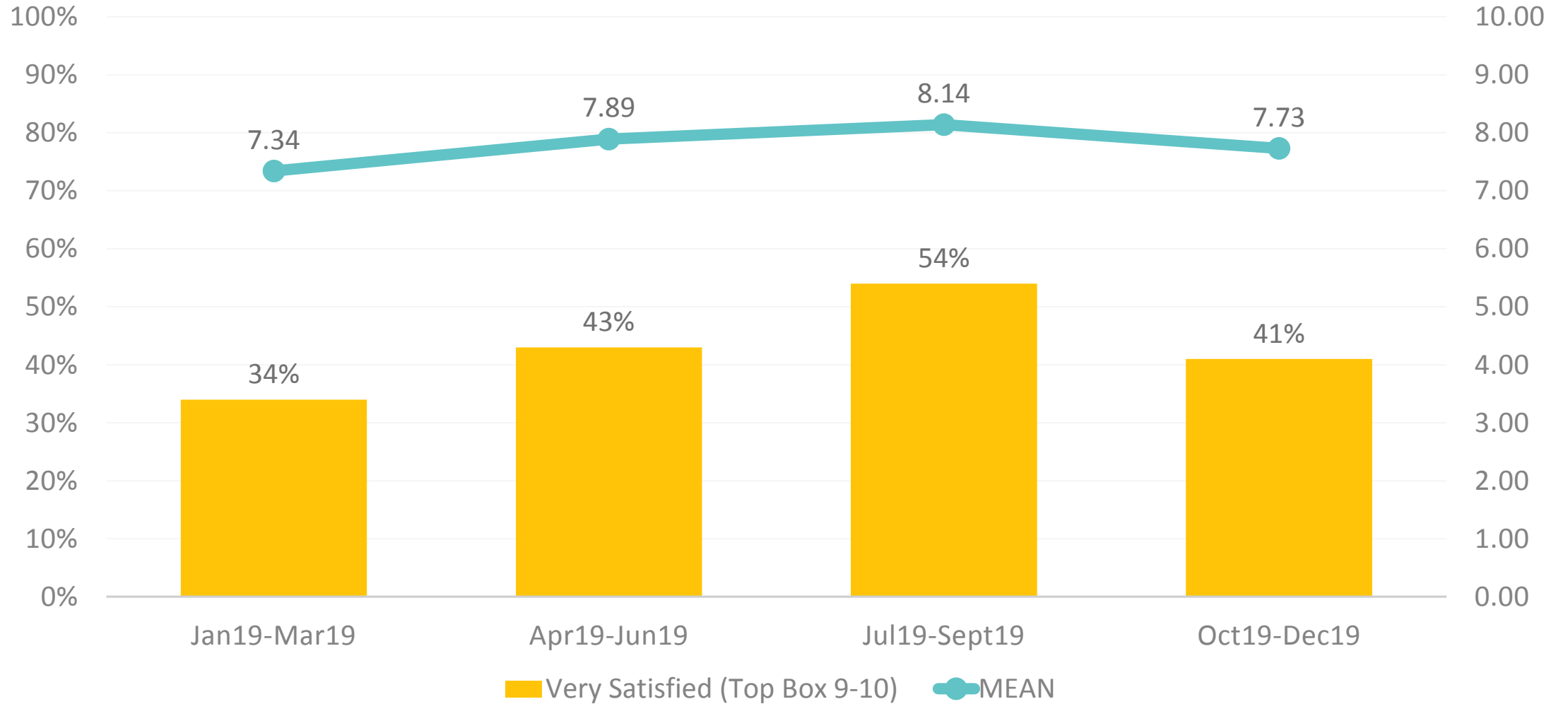
SWOT – NEGATIVE ASPECT OF TRIP



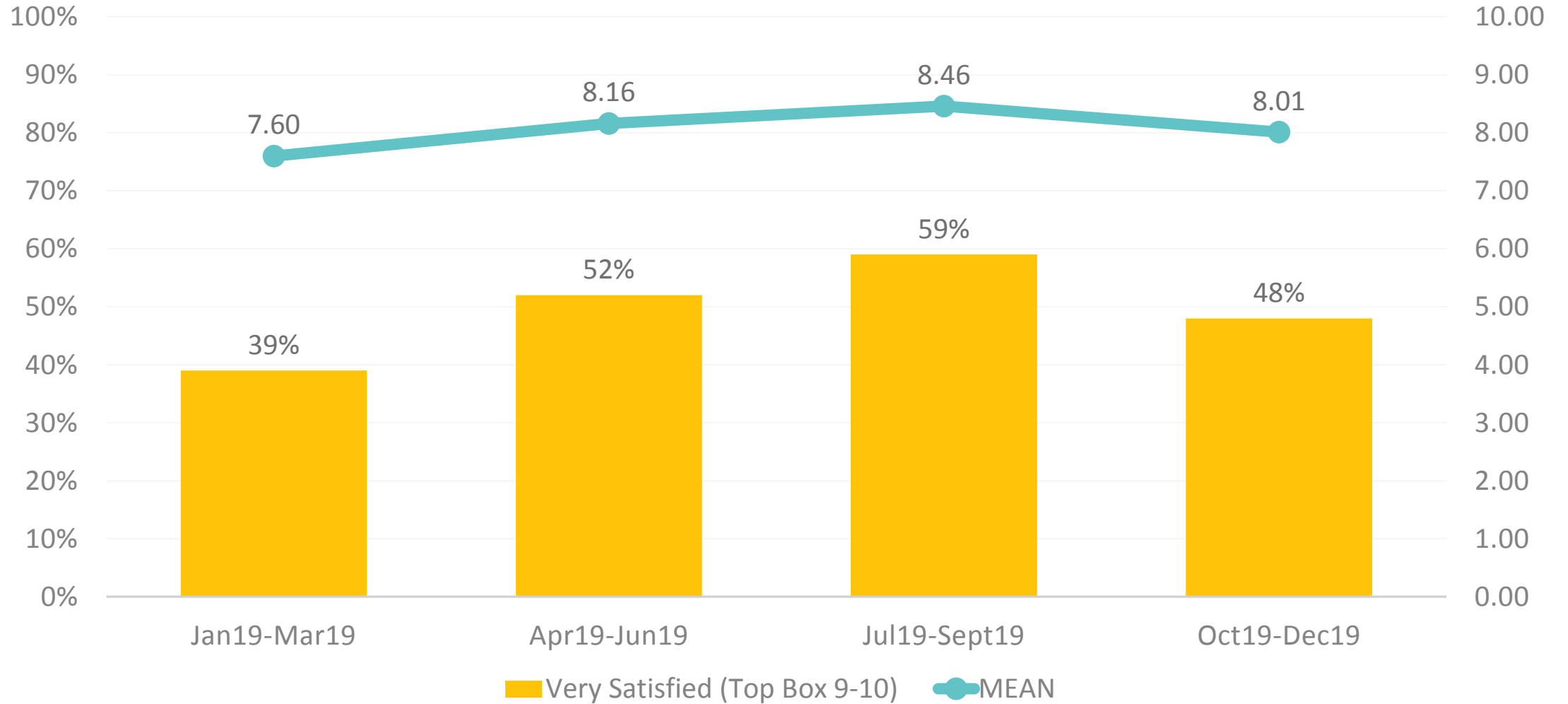
SATISFACTION – ENTERTAINMENT



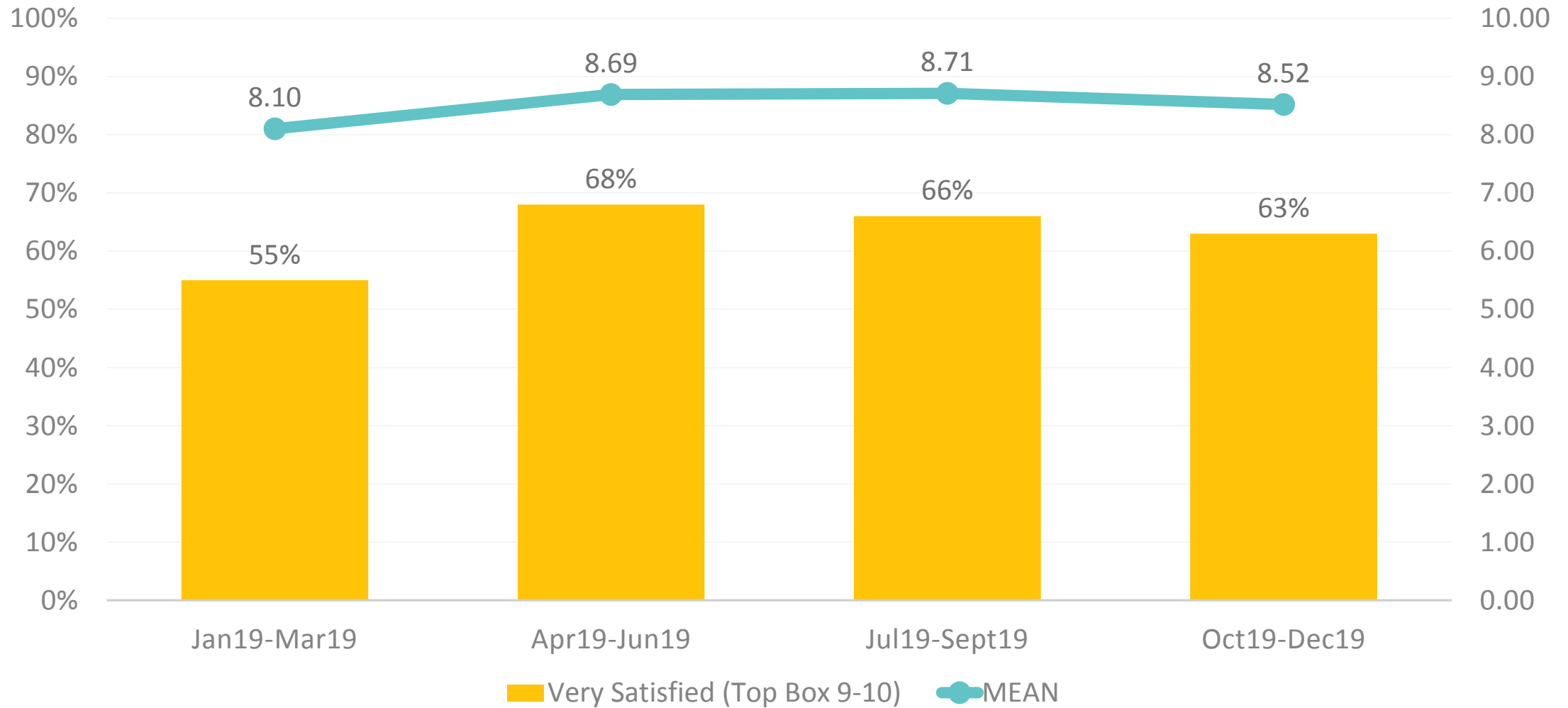
SATISFACTION – SHOPPING



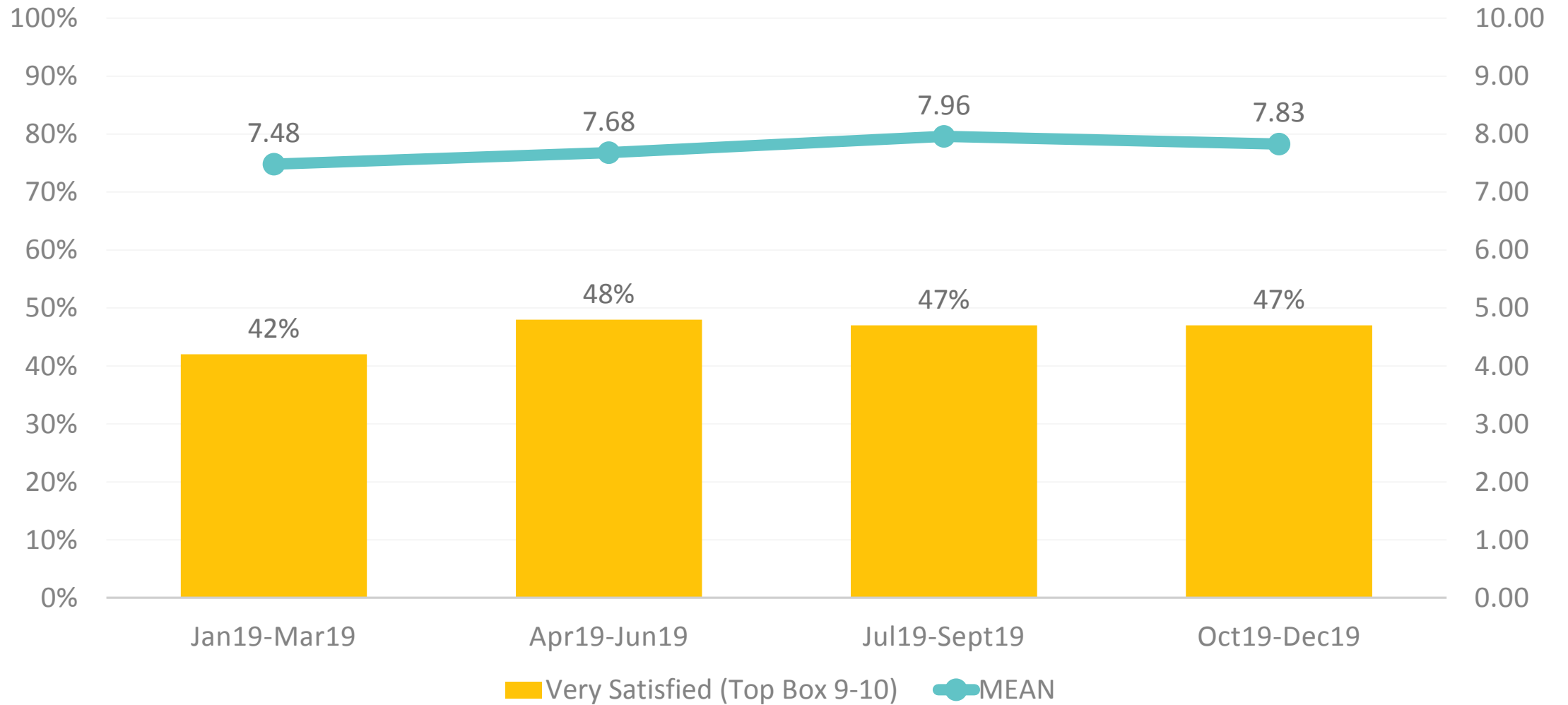
SATISFACTION – DINING



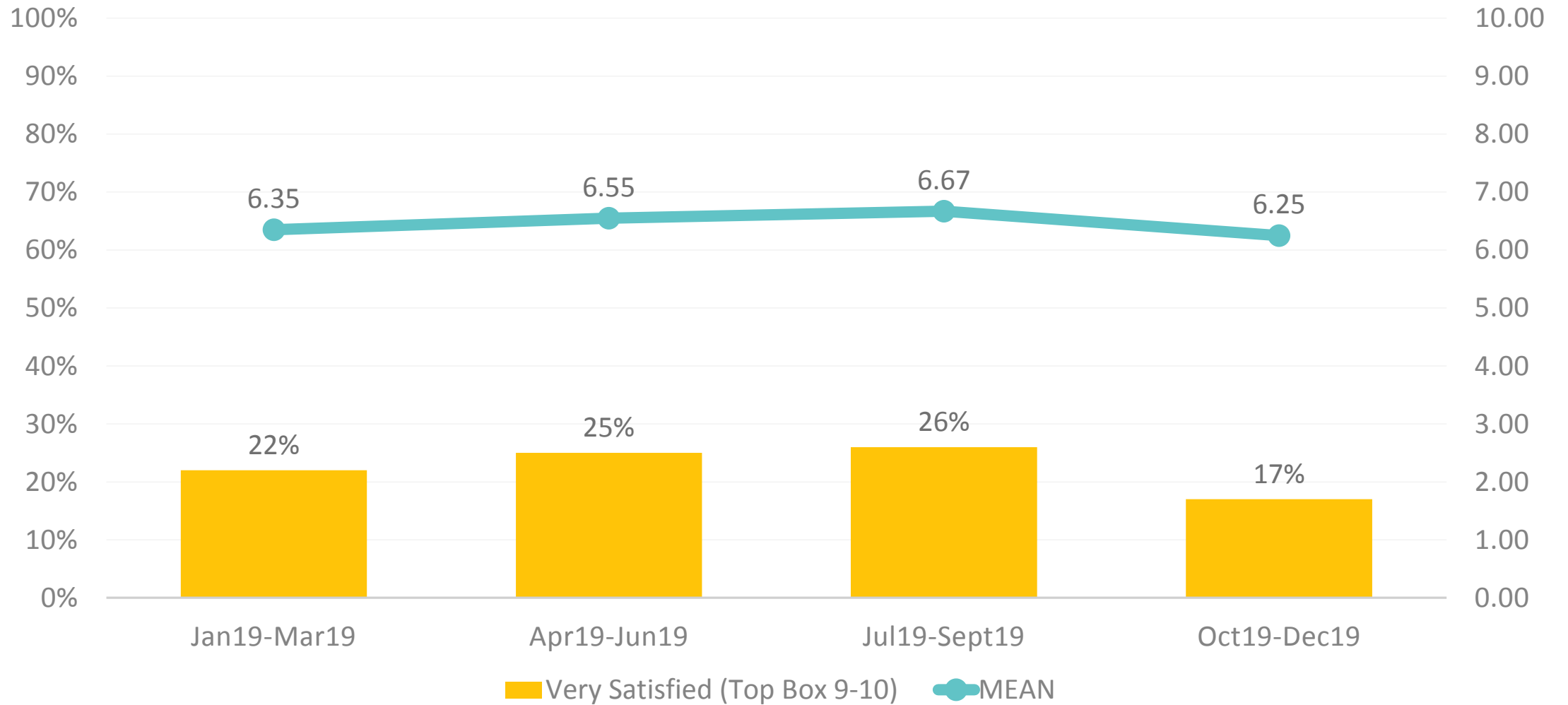
SATISFACTION – BEACHES



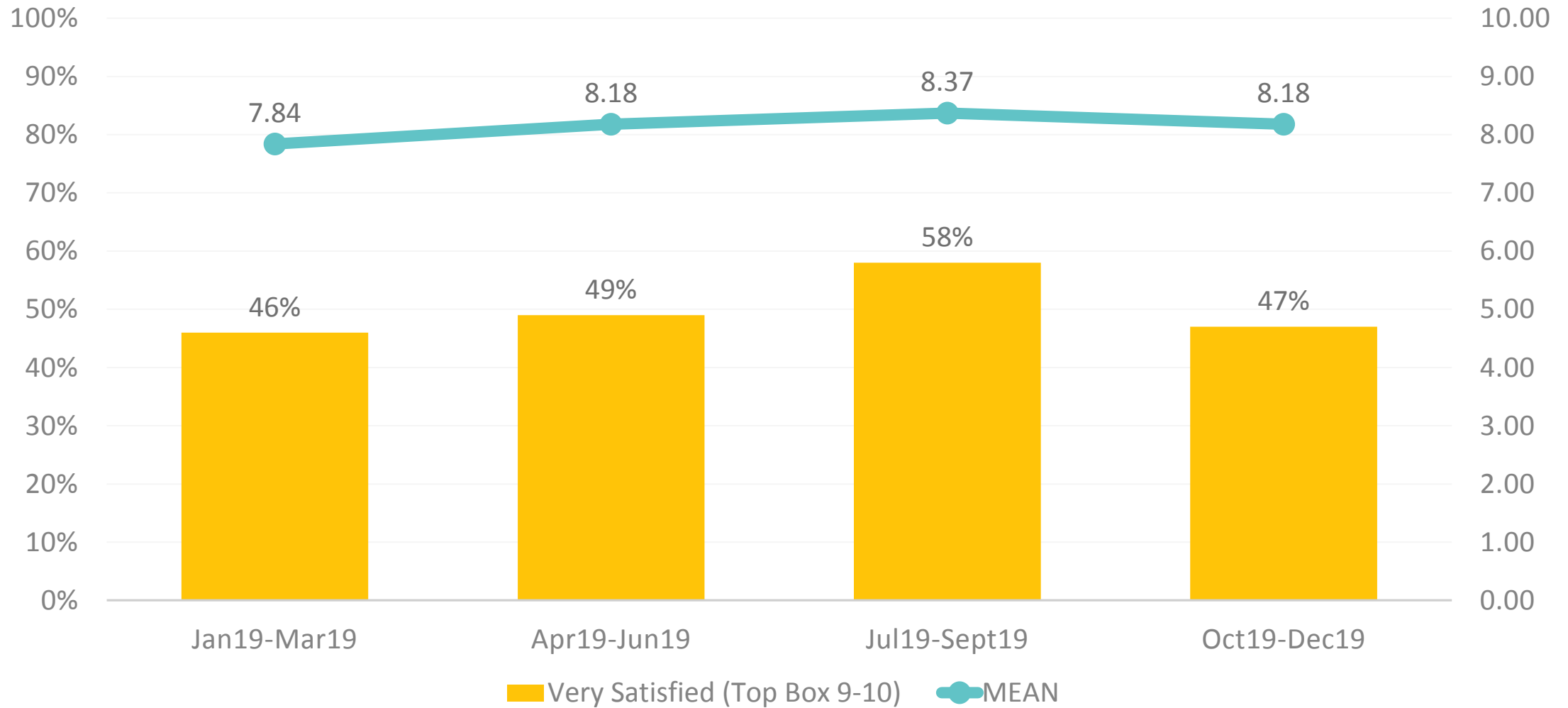
SATISFACTION – PARKS



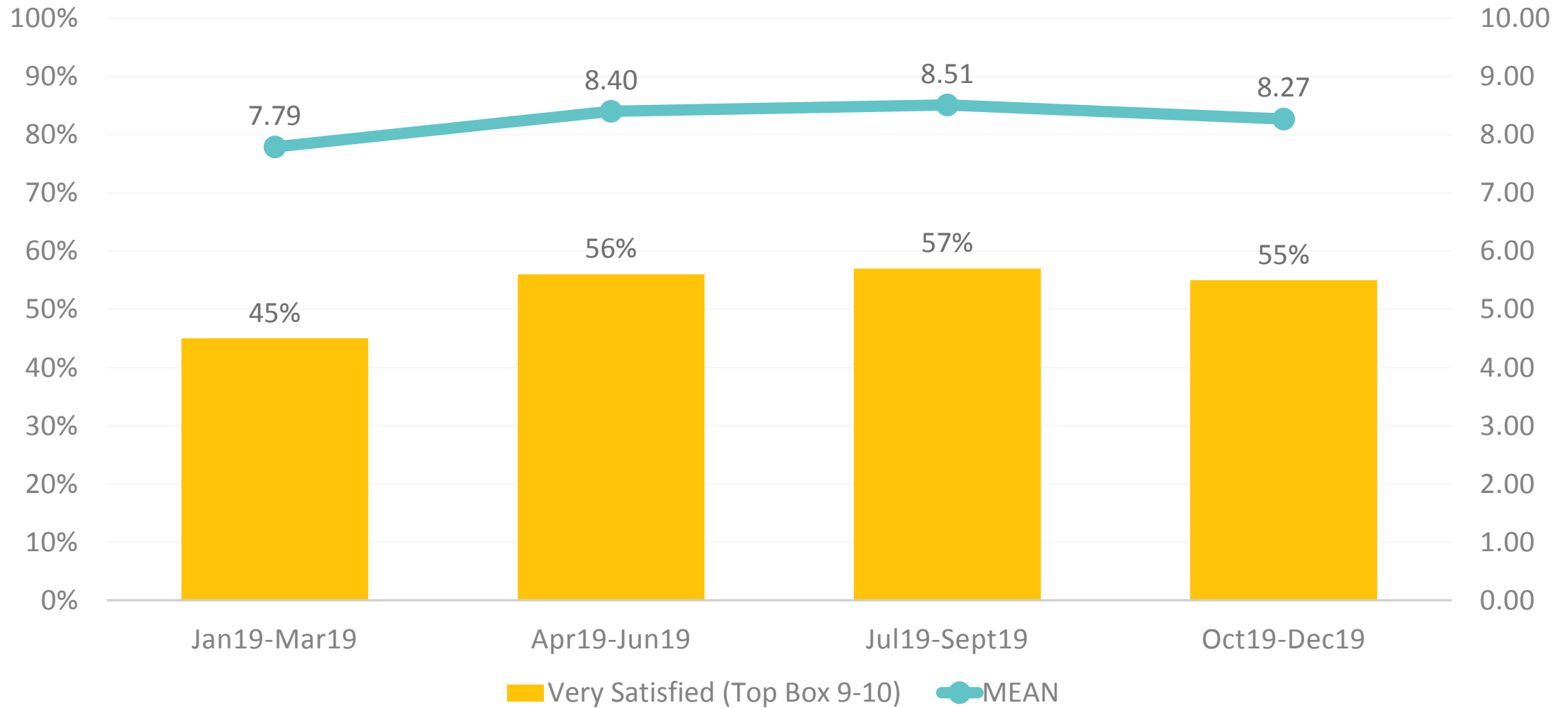
SATISFACTION – ROADS



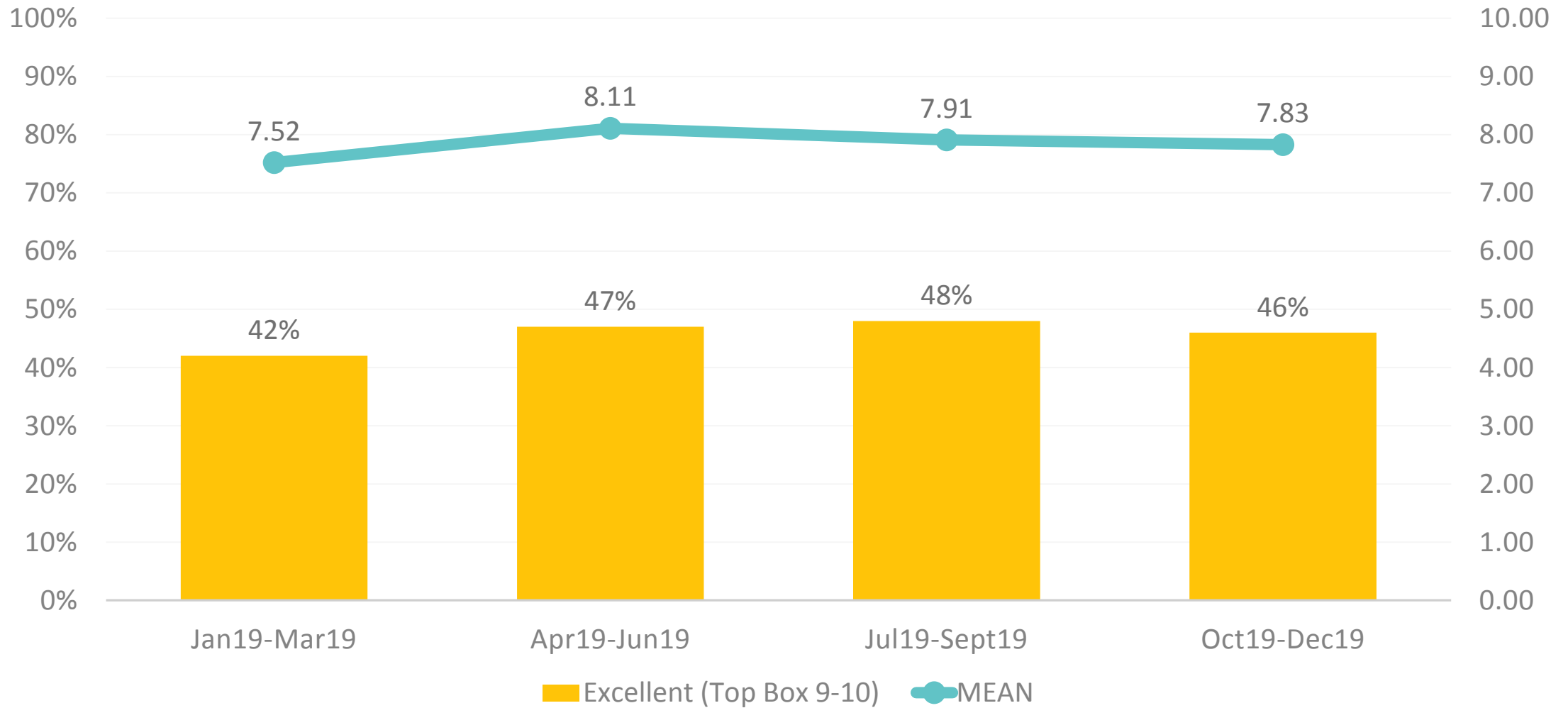
SATISFACTION – SIGHTSEEING AREAS



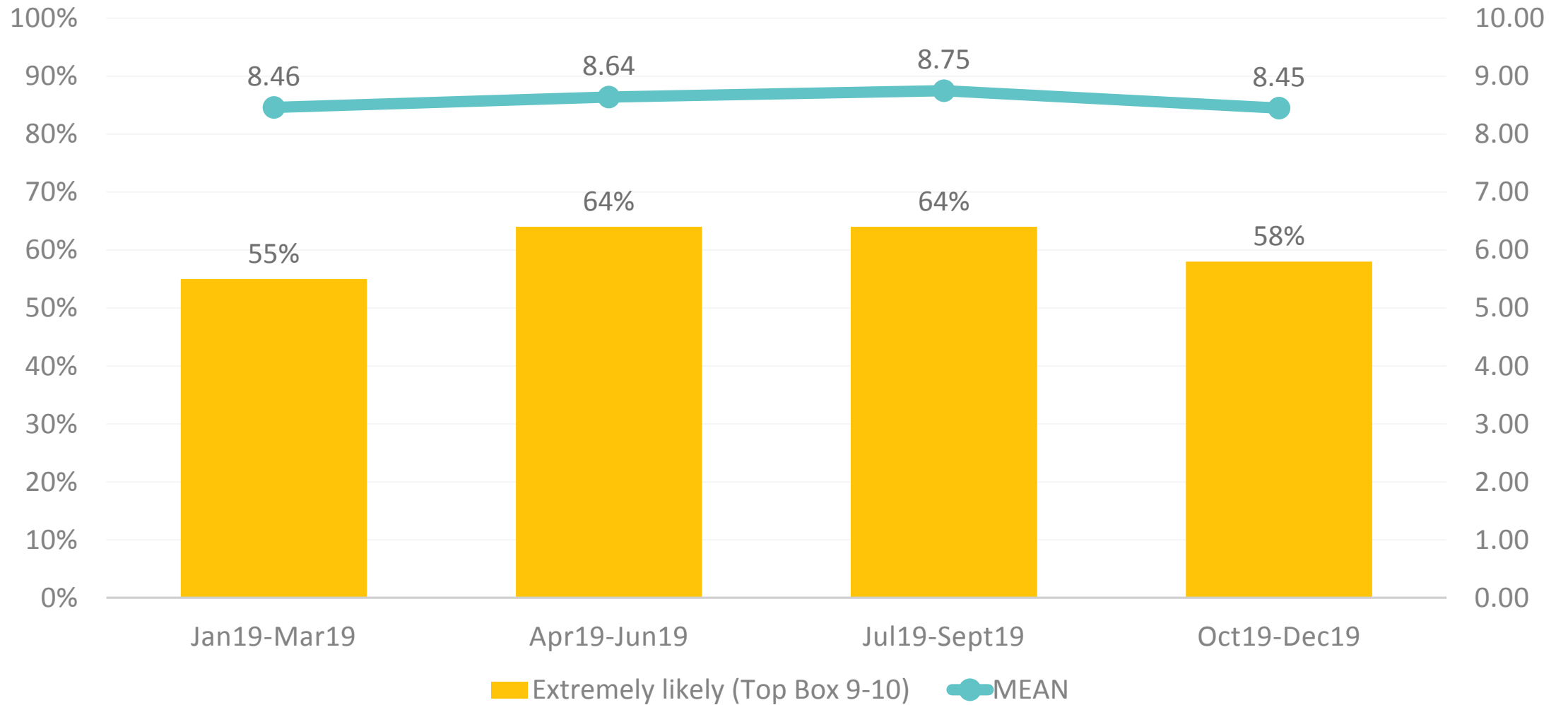
SATISFACTION – SAFETY & SECURITY



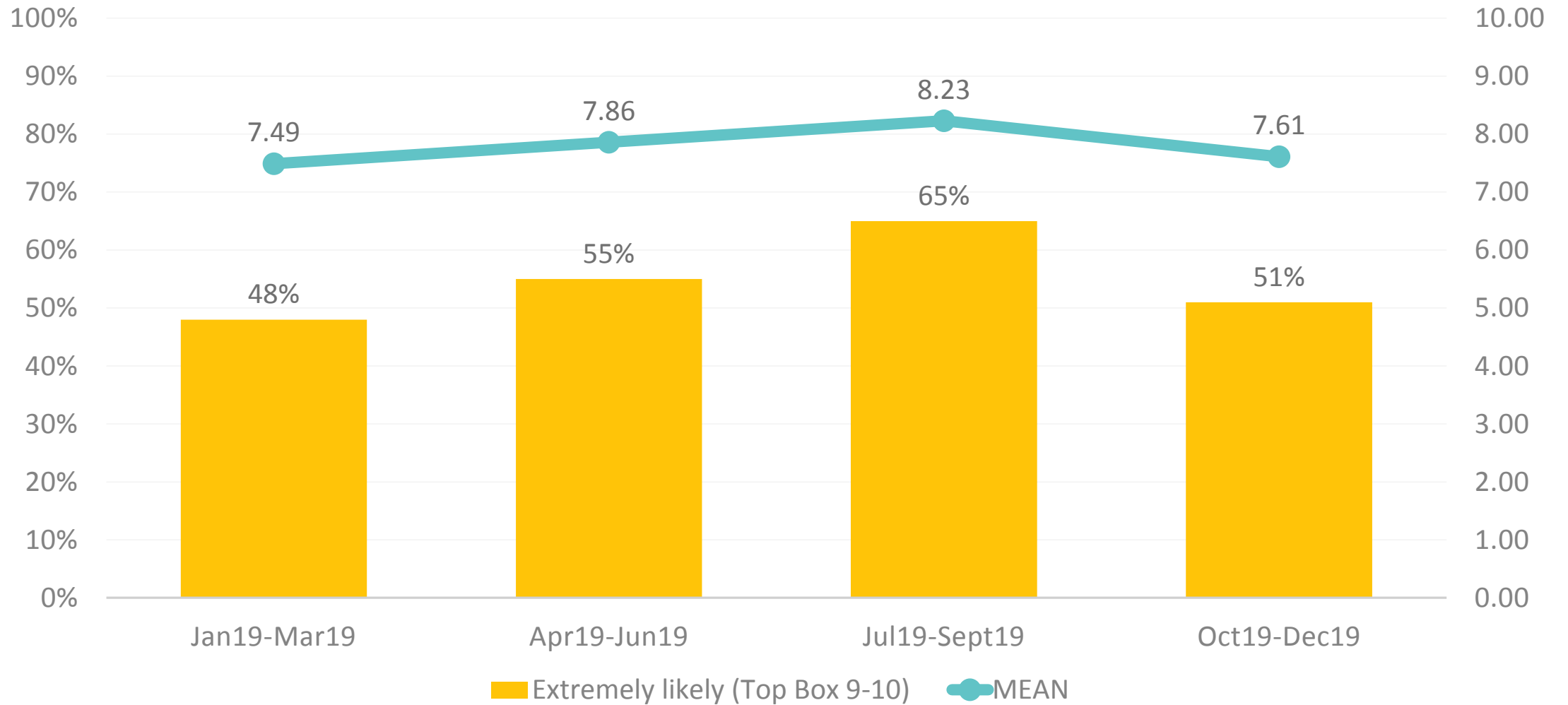
SATISFACTION – ACCOMMODATIONS



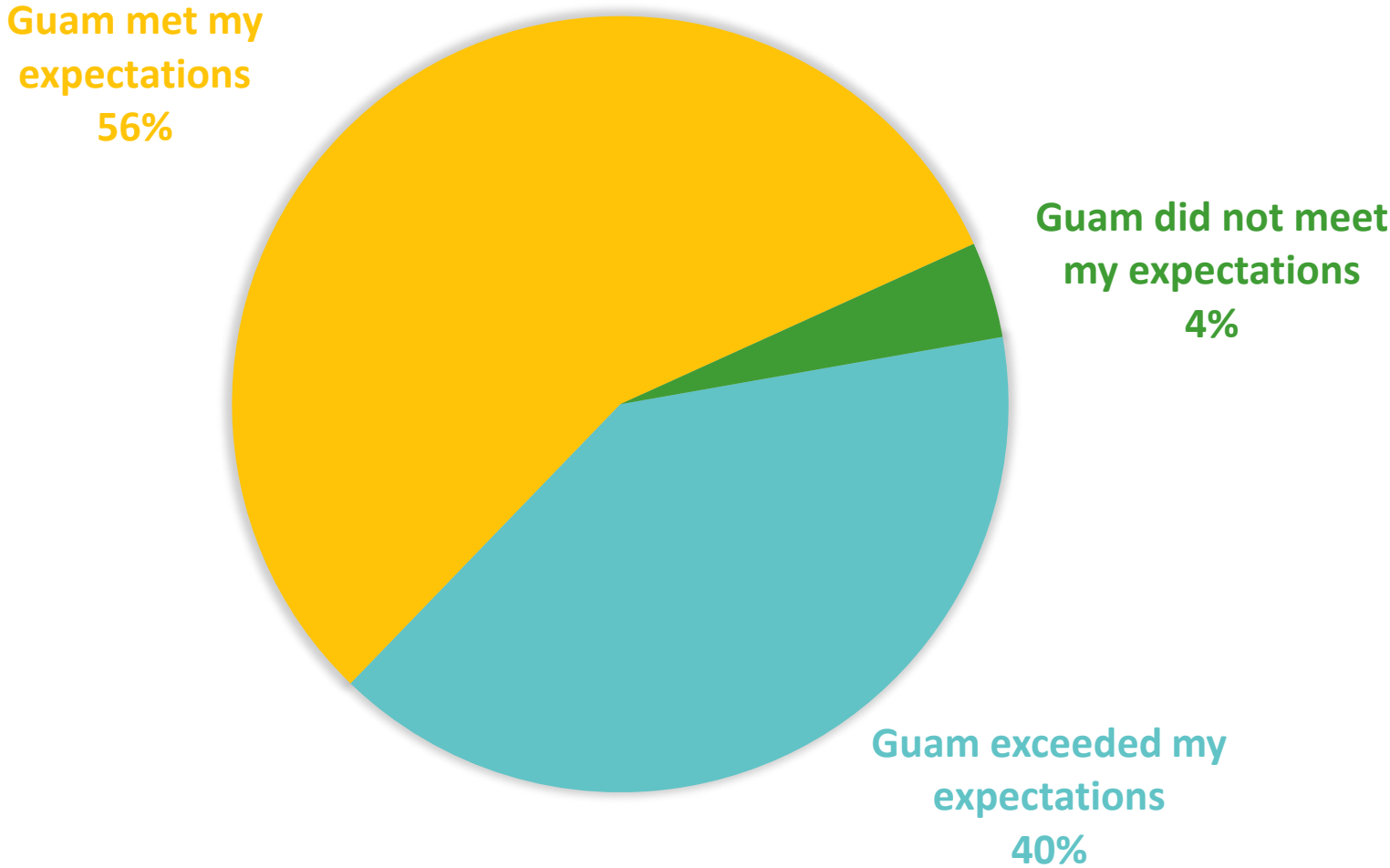
BRAND ADVOCACY



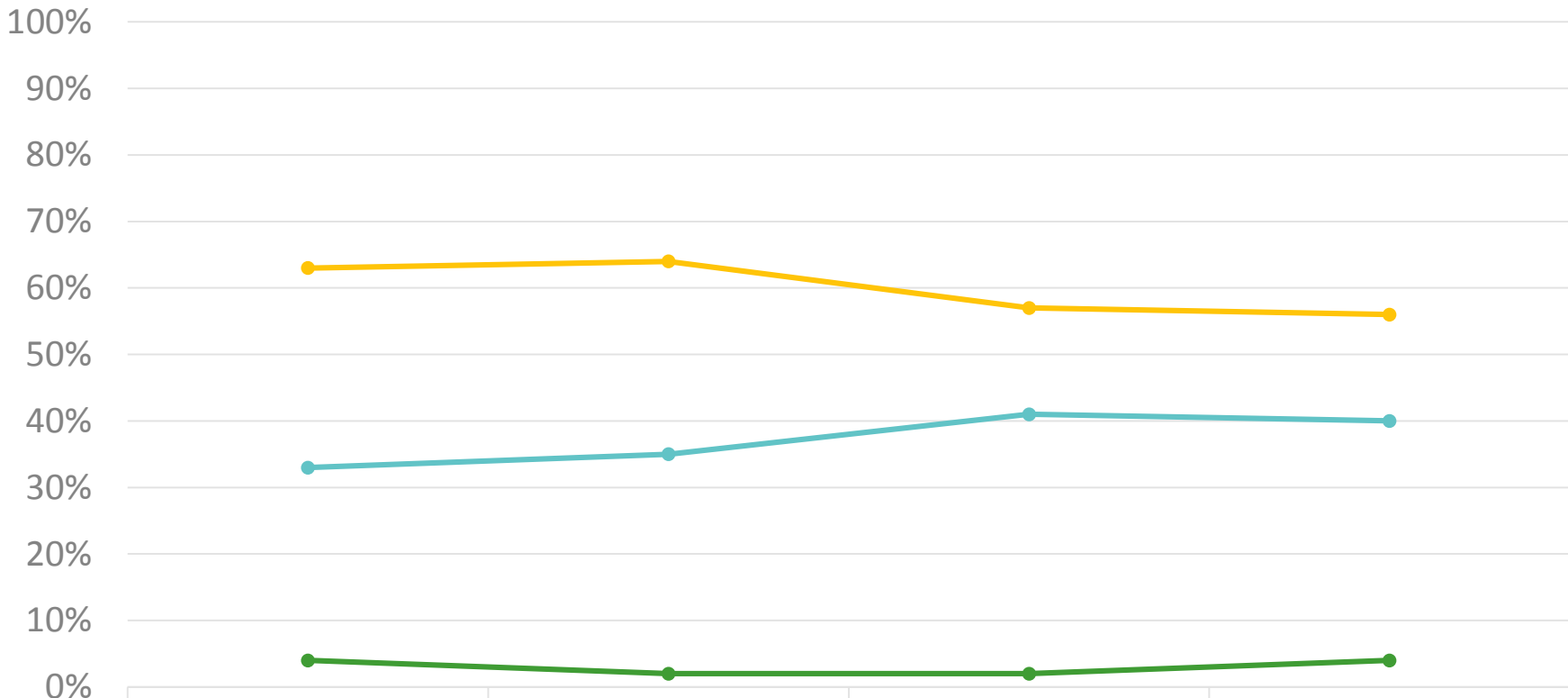
BRAND LOYALTY



TRIP EXPECTATIONS

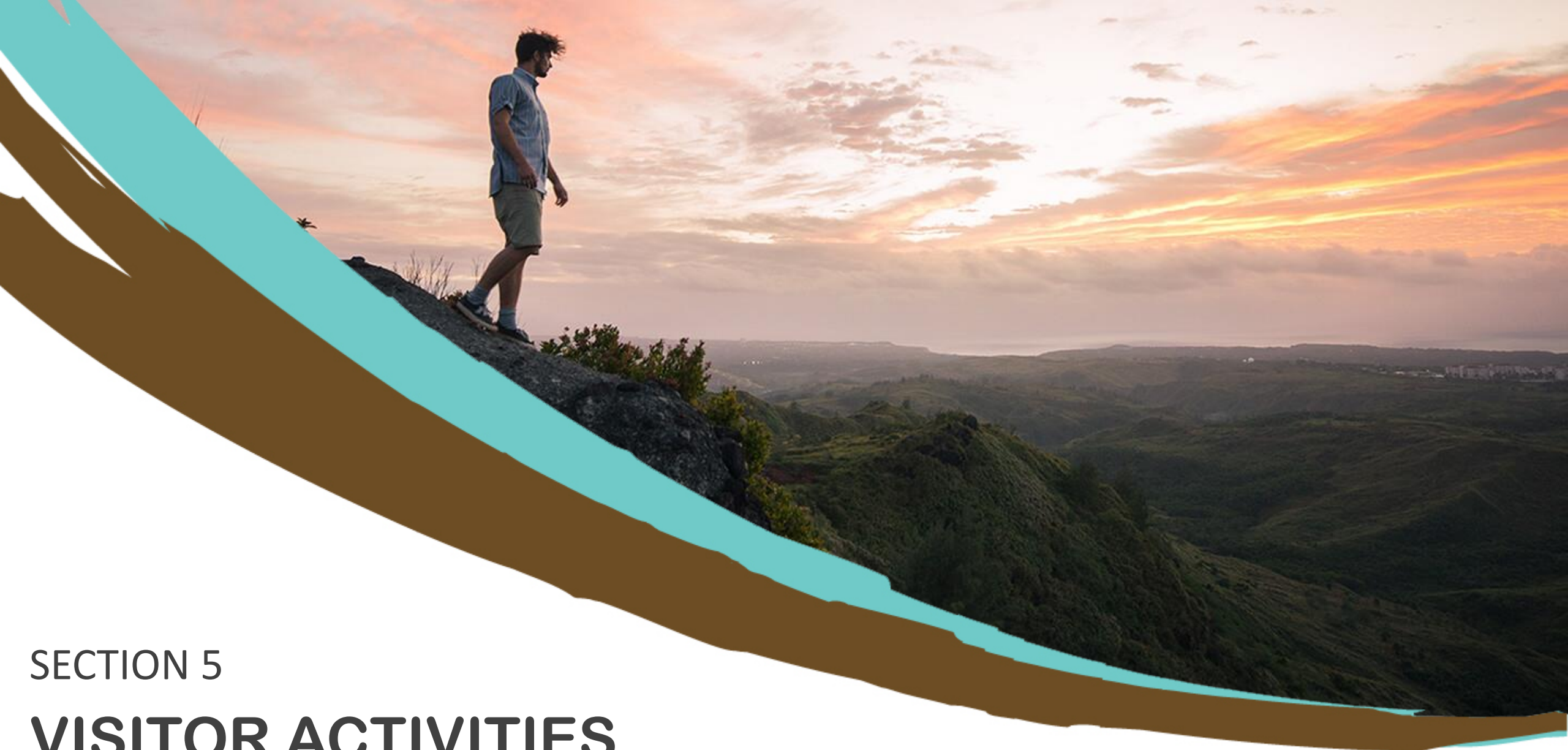


TRIP EXPECTATIONS – TRACKING



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19
Exceeded expectations	33%	35%	41%	40%
Met expectations	63%	64%	57%	56%
Did not meet expectations	4%	2%	2%	4%

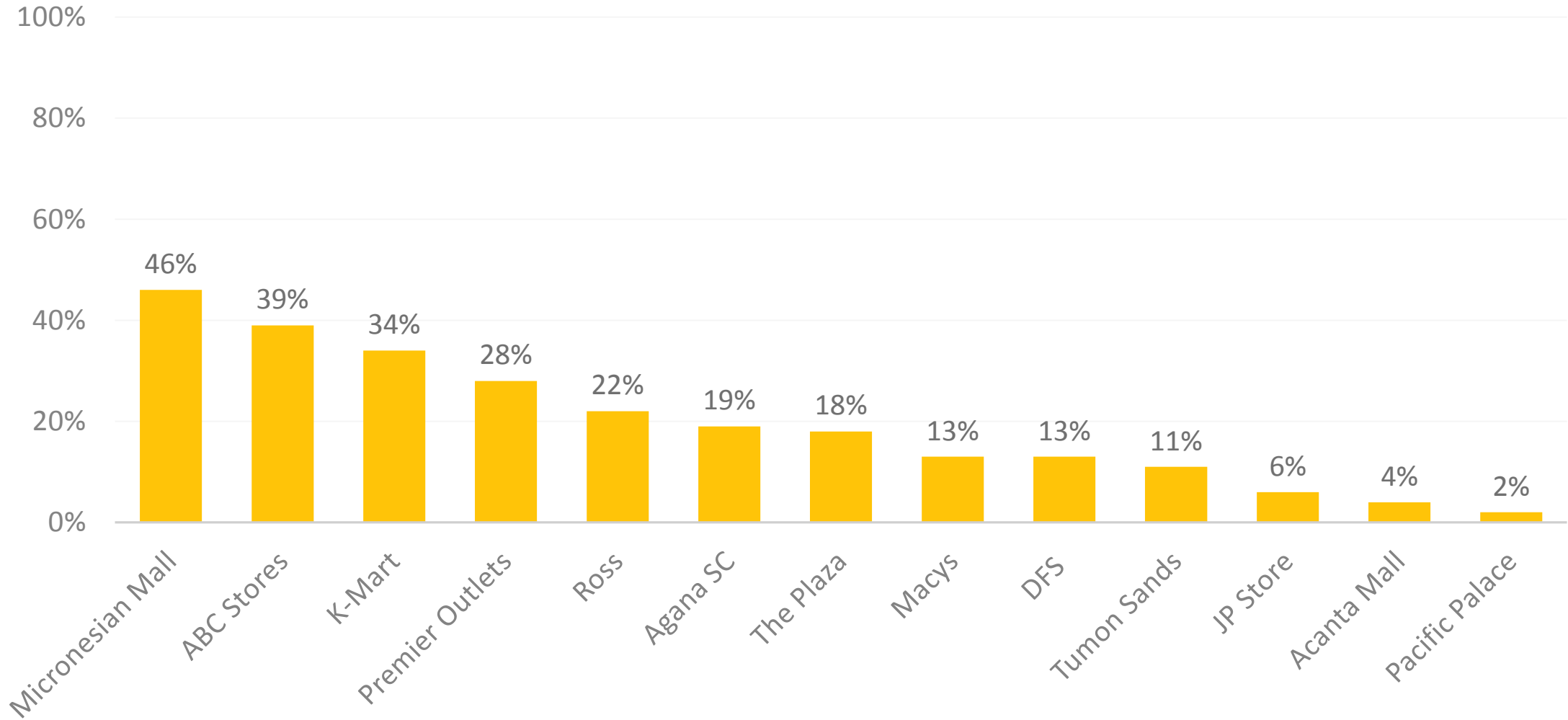




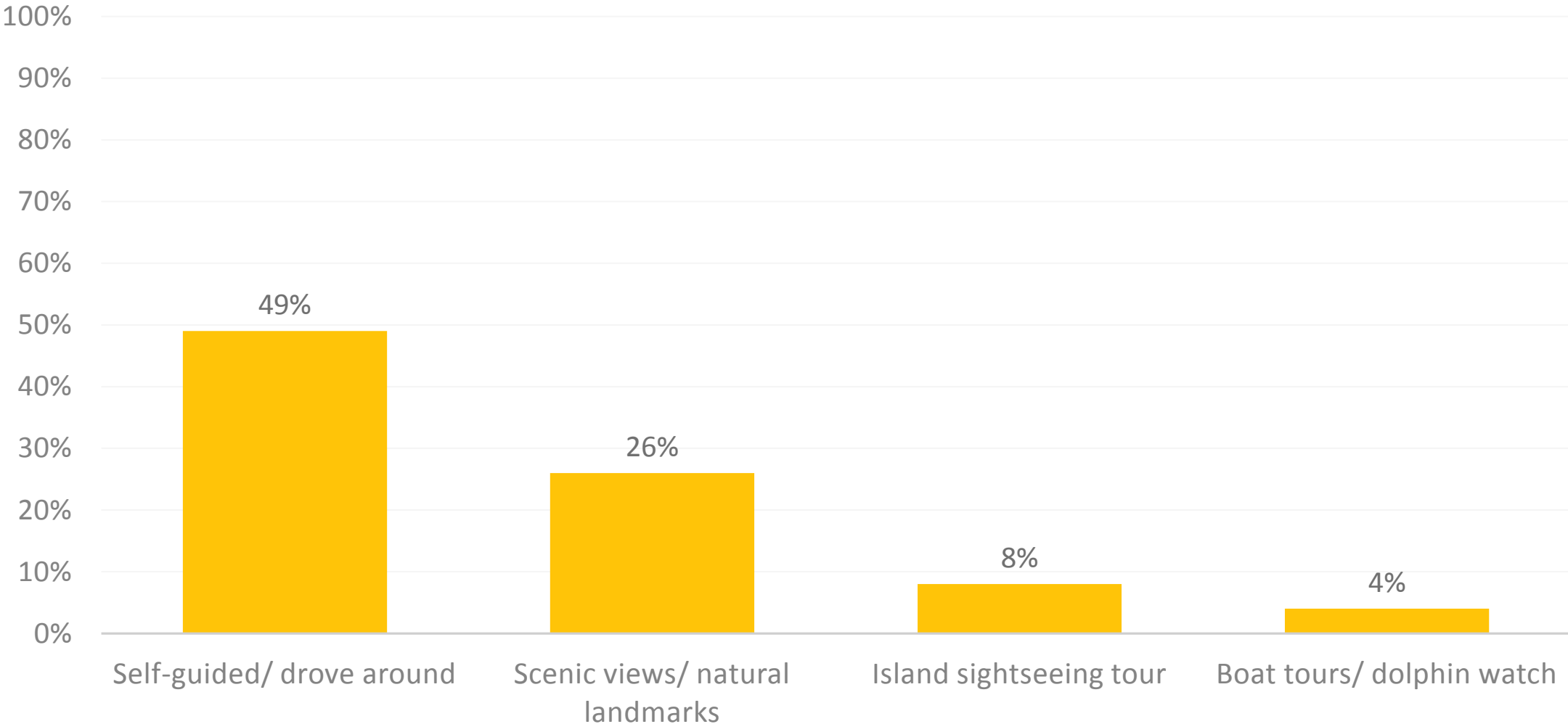
SECTION 5
VISITOR ACTIVITIES



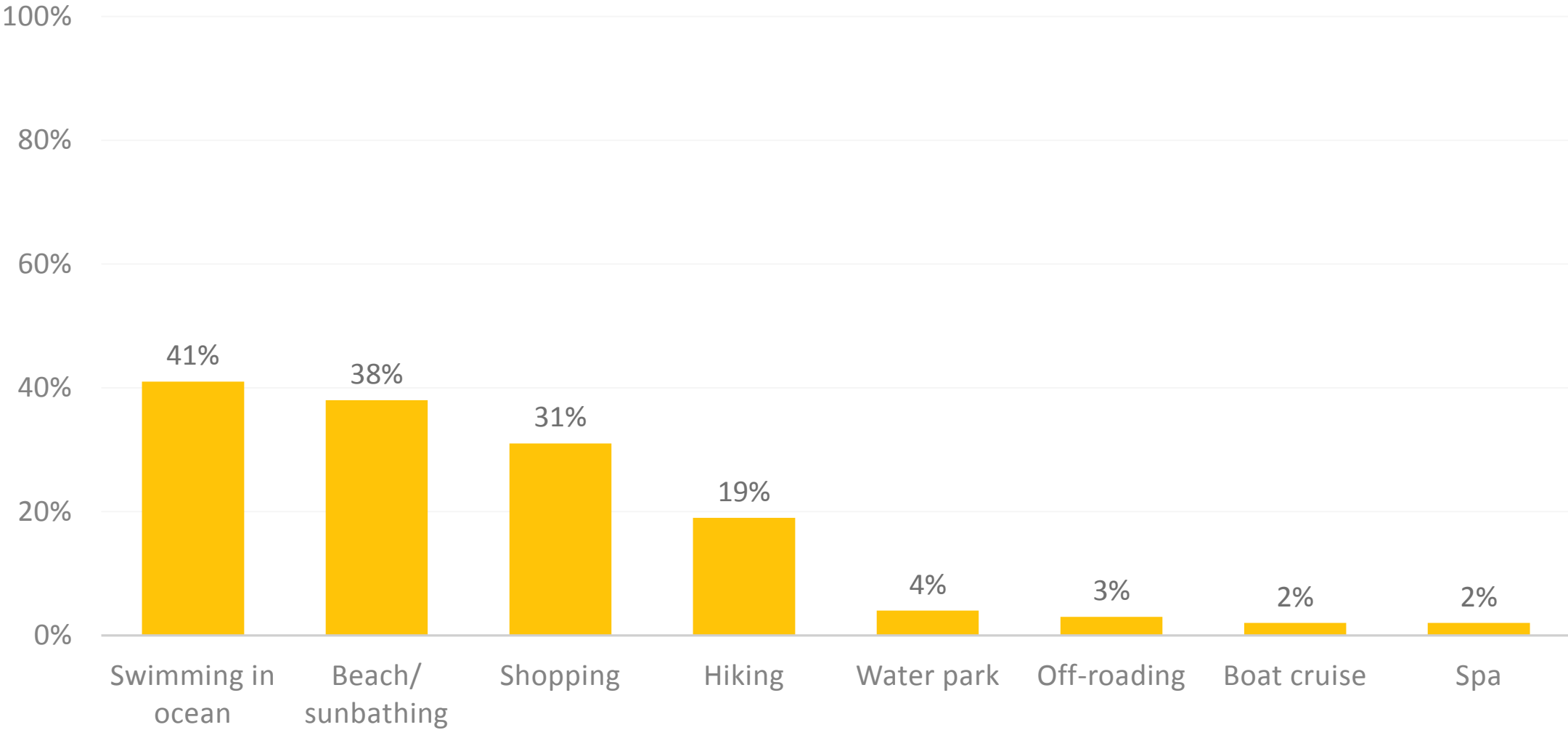
SHOPPING AREAS – PENETRATION



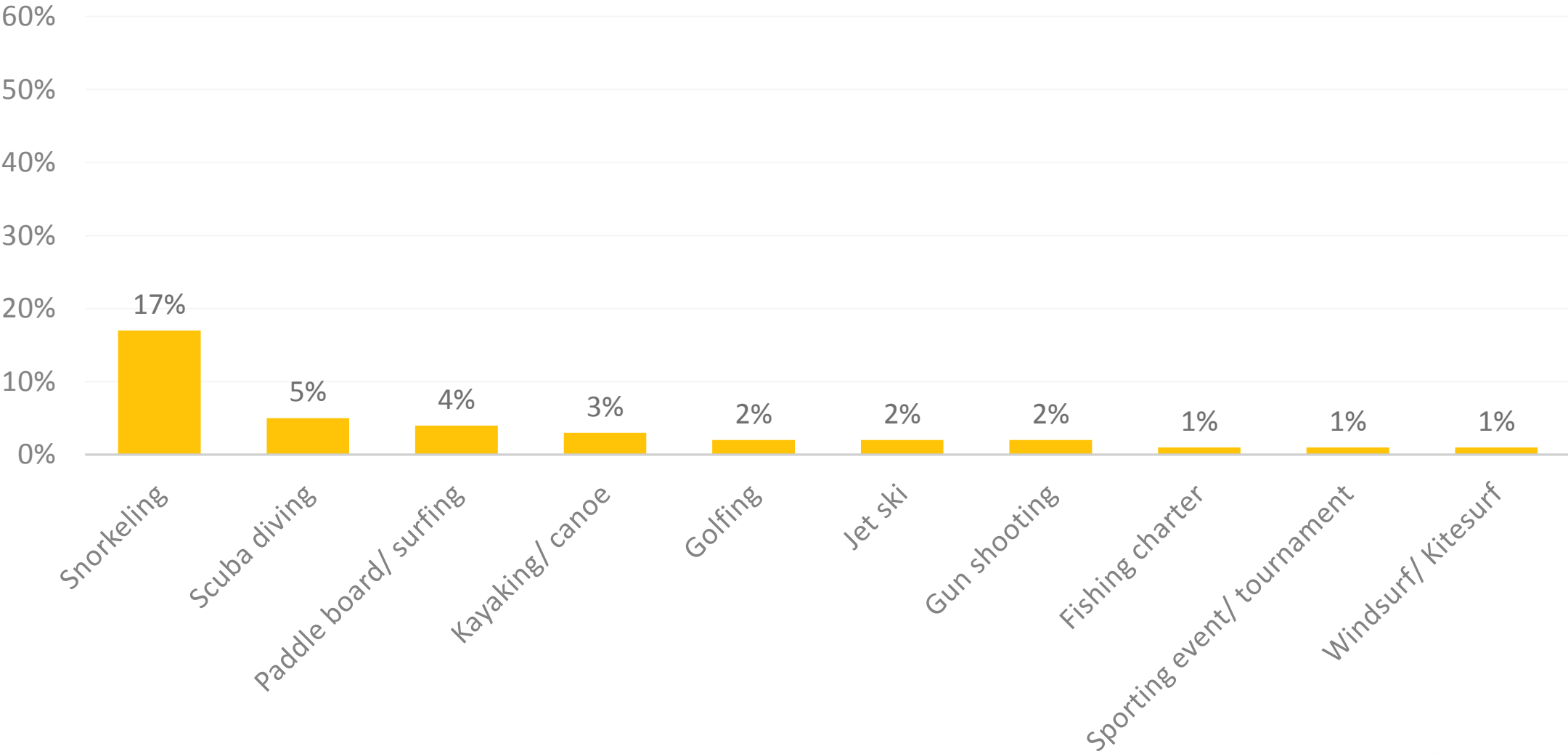
ACTIVITIES – SIGHTSEEING



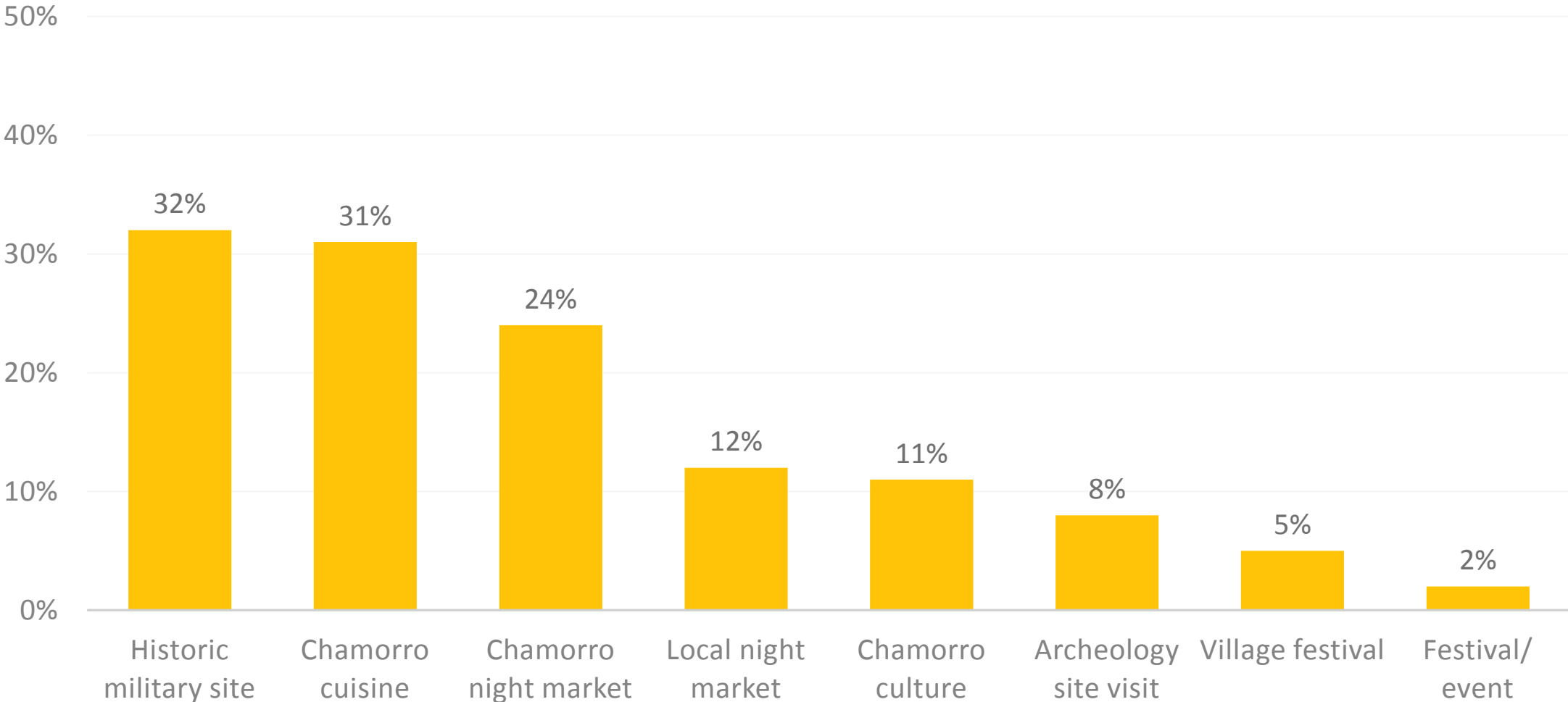
ACTIVITIES – RECREATION



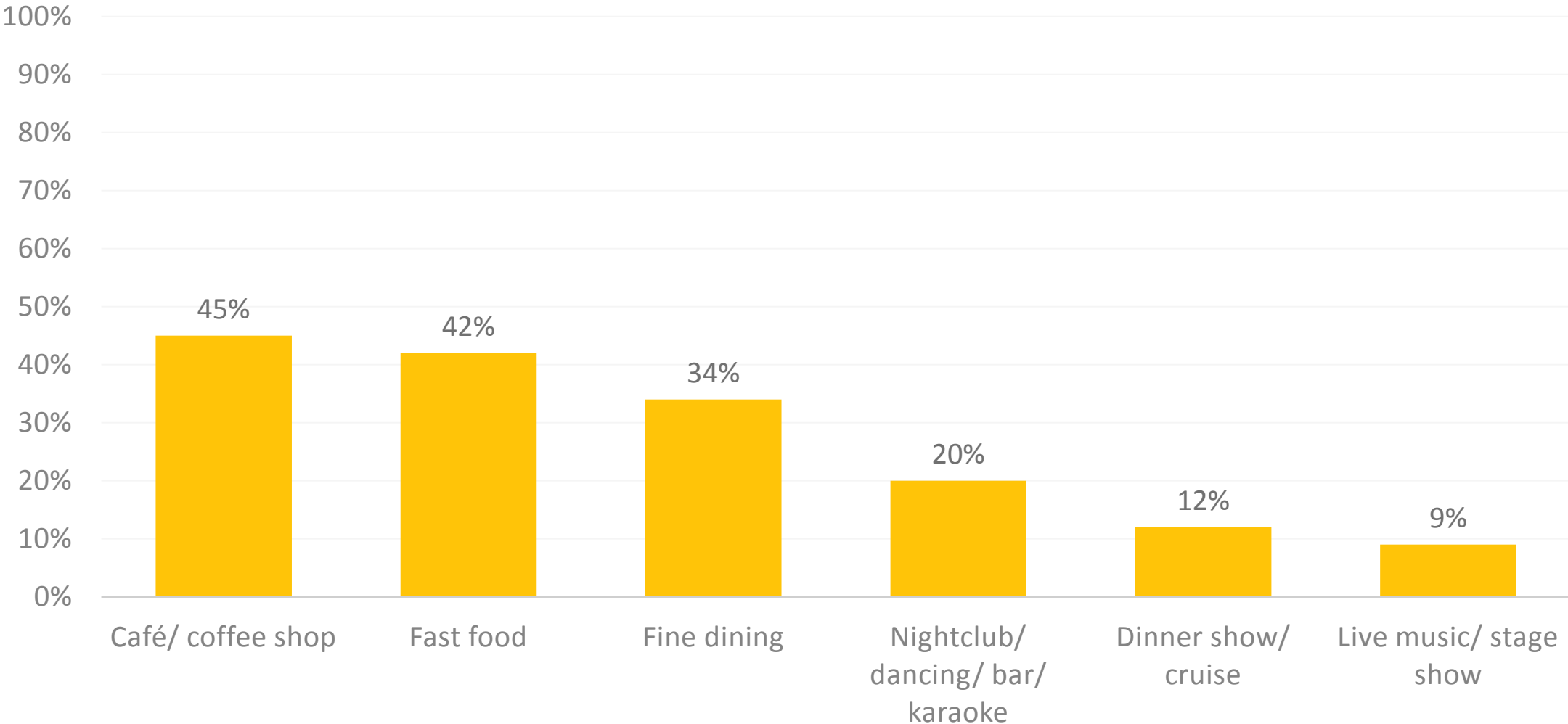
ACTIVITIES – SPORTS



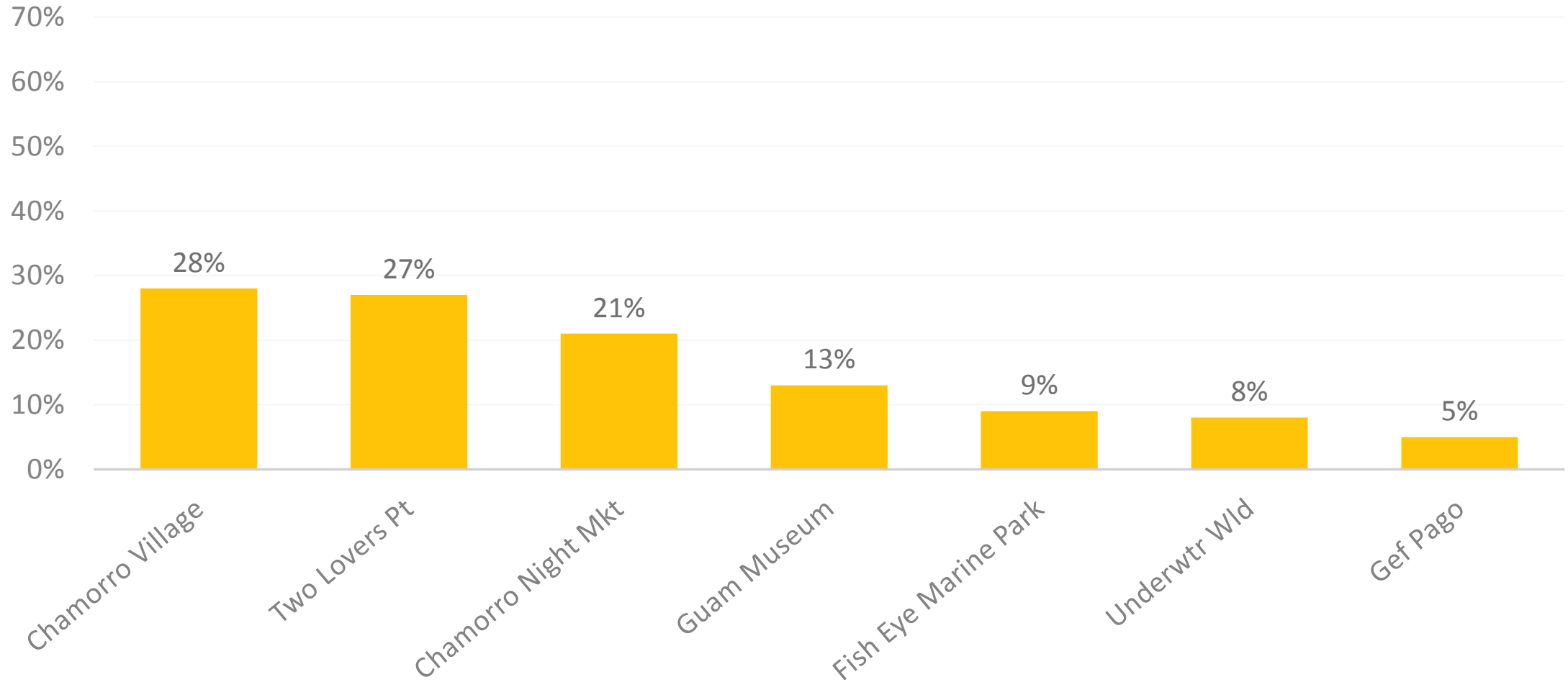
ACTIVITIES – HISTORY, CULTURE, ARTS



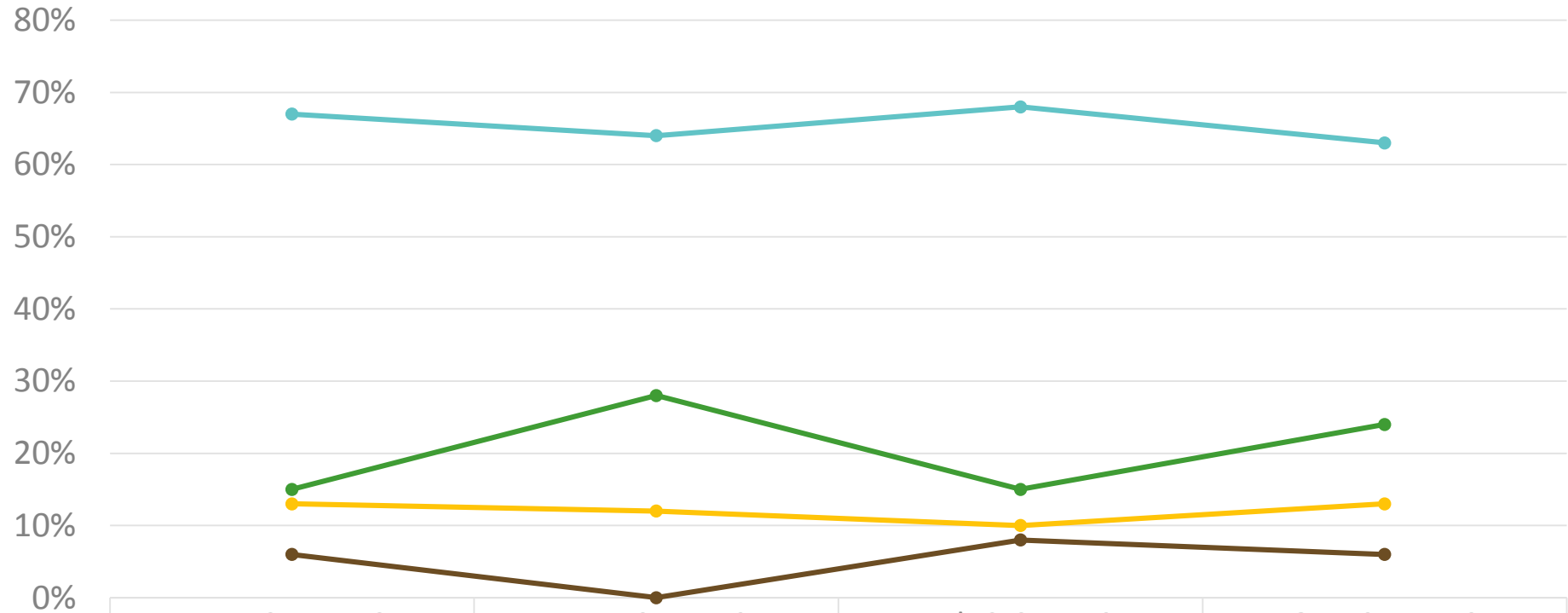
ACTIVITIES – ENTERTAINMENT & DINING



LOCAL ATTRACTIONS – TOP RESPONSES (5%+)



LOCAL CULTURE – OBSTACLES



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19
Schedule	67%	64%	68%	63%
Unaware	13%	12%	10%	13%
Did not want to	15%	28%	15%	24%
Did not know where	6%	0%	8%	6%

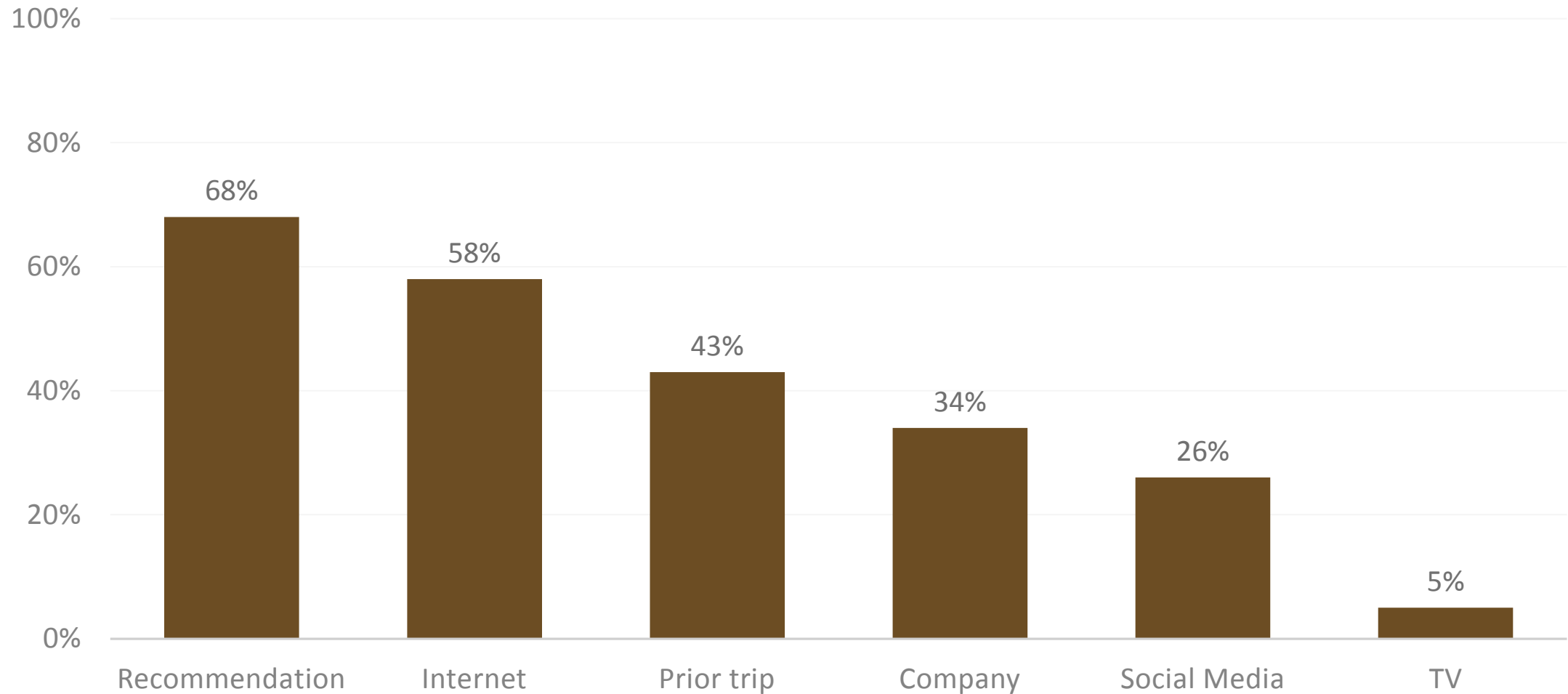


SECTION 6

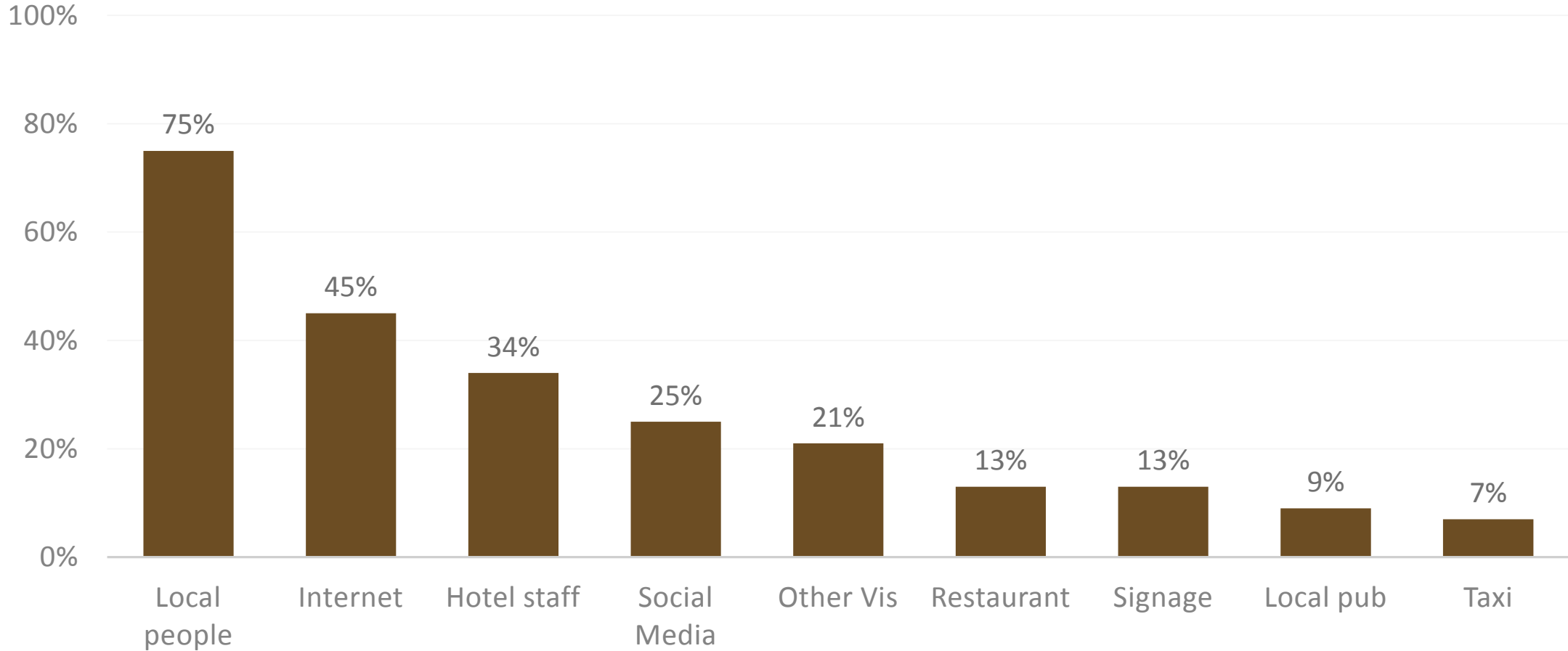
SOURCES OF INFORMATION



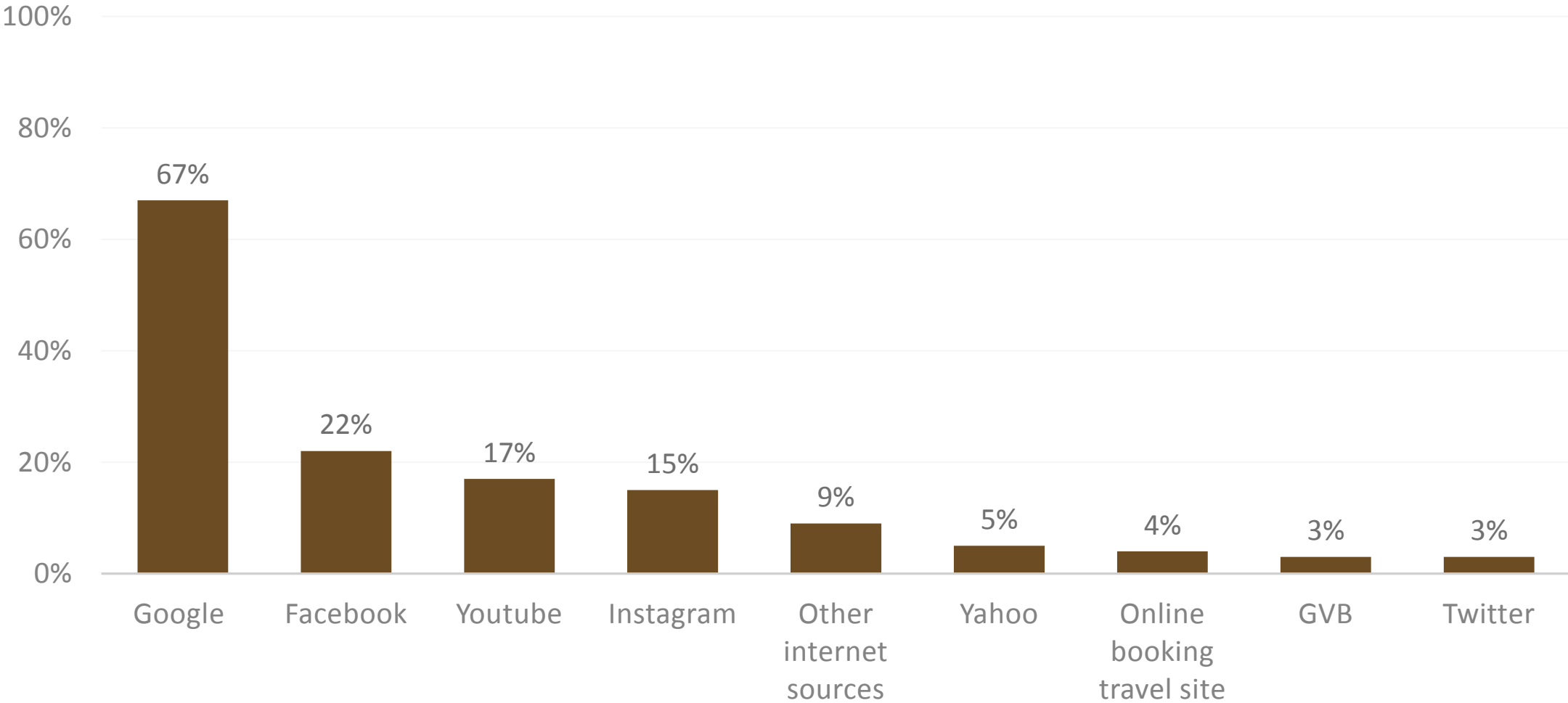
PRE-ARRIVAL SOURCES OF INFORMATION



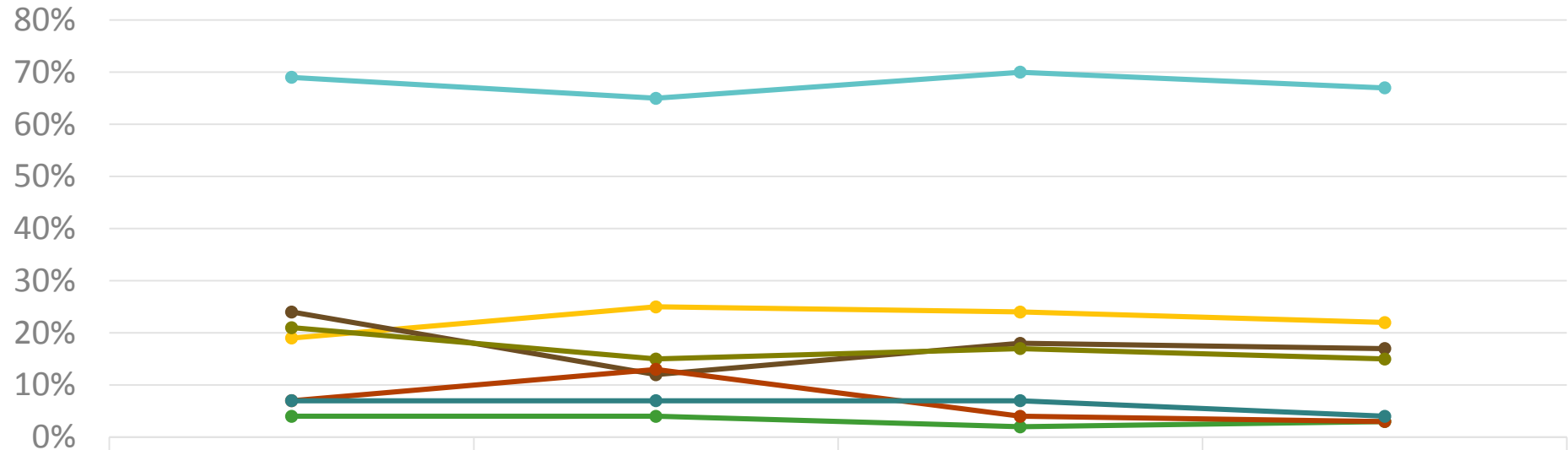
ONISLE SOURCES OF INFORMATION



ONLINE SOURCES OF INFORMATION



ONLINE SOURCES OF INFORMATION



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19
Google	69%	65%	70%	67%
Facebook	19%	25%	24%	22%
Twitter	4%	4%	2%	3%
Youtube	24%	12%	18%	17%
IG	21%	15%	17%	15%
GVB	7%	13%	4%	3%
Online booking site	7%	7%	7%	4%

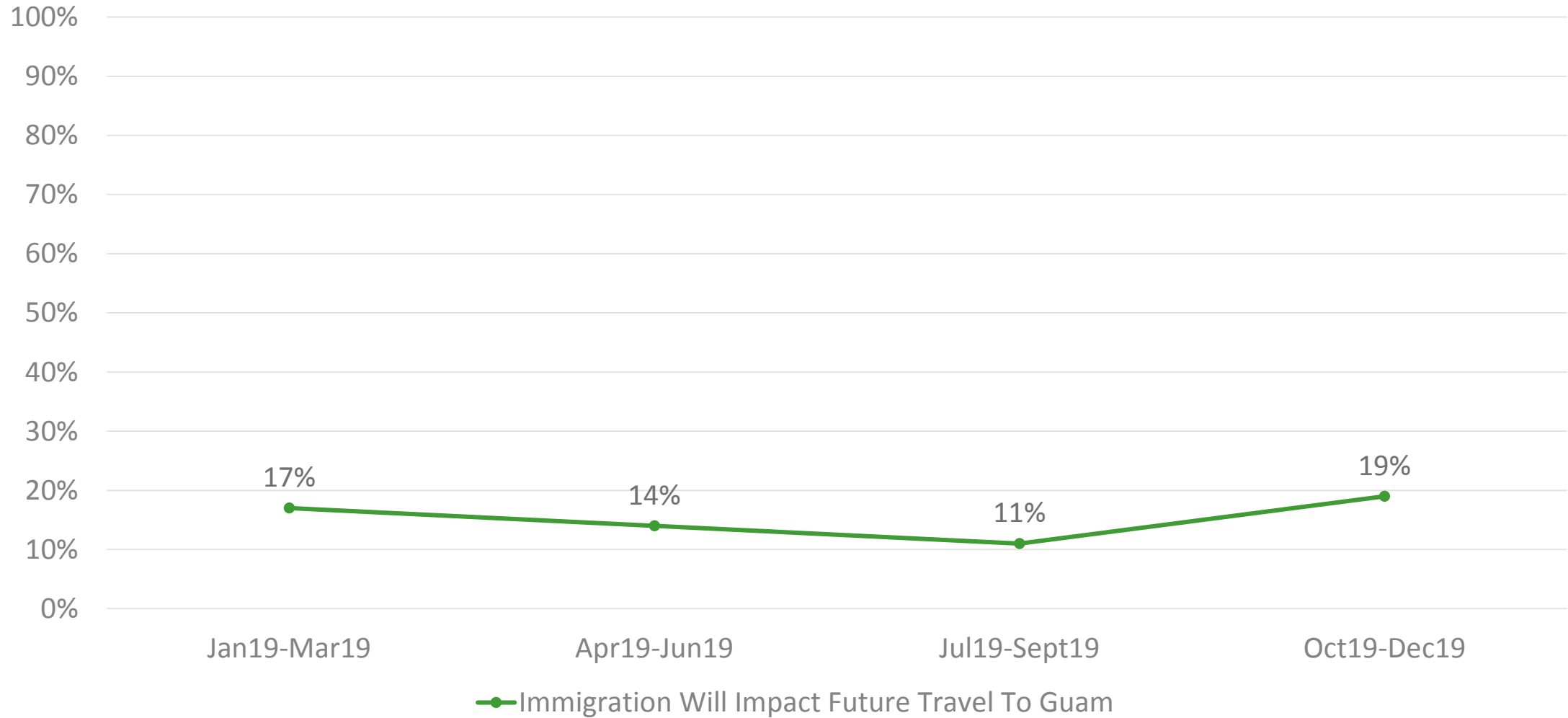


SECTION 7

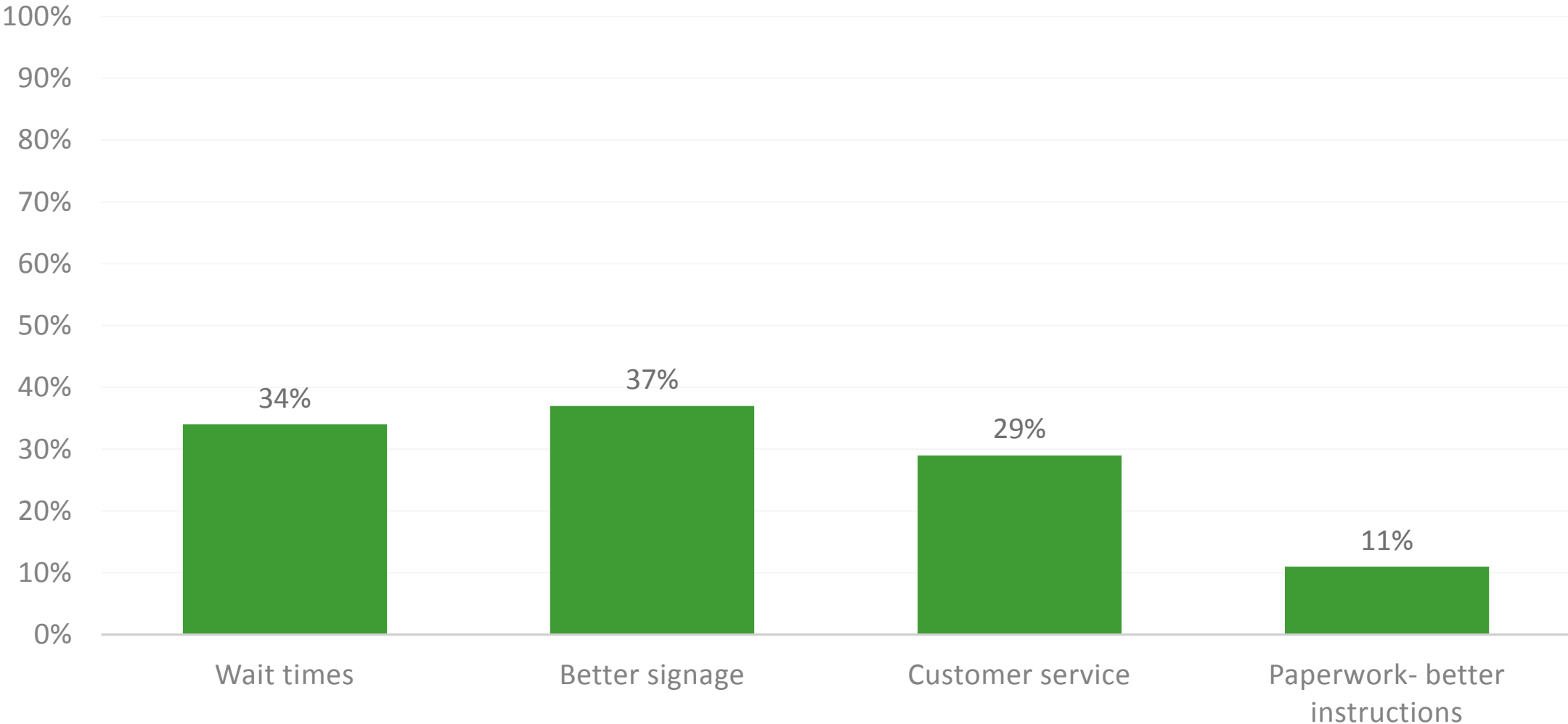
IMMIGRATION



IMPACT OF AIRPORT IMMIGRATION SVC ON FUTURE TRAVEL TO GUAM



AIRPORT – SECURITY/ IMMIGRATION ISSUES



Q: What about the security screening and/ or immigration process here at the Guam International Airport could be improved?





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, Jan-Dec 2019

	Jan-Mar 2019	Apr-Jun 2019	Jul-Sep 2019	Oct-Dec 2019	Jan-Dec 2019
Drivers:	rank	rank	rank	rank	rank
Entertainment	1	1		2	1
Shopping					
Dining		3			
Beaches					
Parks			3		
Roads	2				
Sightseeing Areas			1		2
Being a safe and secure destination		1	2	1	
% of Overall Satisfaction Accounted For:	42.5%	46.5%	51.3%	36.5%	33.9%

NOTE: Only significant drivers are included.

DRIVERS – OVERALL SATISFACTION

- **Overall satisfaction** with the U.S. visitor's experience on Guam is driven by two significant factors in the October-December 2019 Period. By rank order they are:
 - **Being a safe & secure destination, and**
 - **Entertainment.**
- With these factors the overall r^2 is .365, meaning that **36.5% of overall satisfaction is accounted for by these factors.**

DRIVERS – ONISLE EXPENDITURES

Comparison of Drivers of Per Person On Island Expenditures, Jan-Dec 2019					
	Jan-Mar 2019	Apr-Jun 2019	Jul-Sep 2019	Oct-Dec 2019	Jan-Dec 2019
Drivers:	rank	rank	rank	rank	rank
Entertainment					
Shopping					
Dining					
Beaches				1	1
Parks					
Roads					
Sightseeing Areas			1		
Being a safe and secure destination					
% of Overall Satisfaction Accounted For:	0.0%	0.0%	6.0%	9.1%	3.3%
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 October-December 2019 Period. It is:
 - **Beaches.**
- With this factor, the overall r^2 is .091, meaning that **9.1% of per person on island expenditure is accounted for by this factor.**