

Guam Visitors Bureau

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

FY2020 – QTR.2 JAN-MAR 2020

[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 206 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 206 is +/- 6.83 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 +/- 6.83 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.

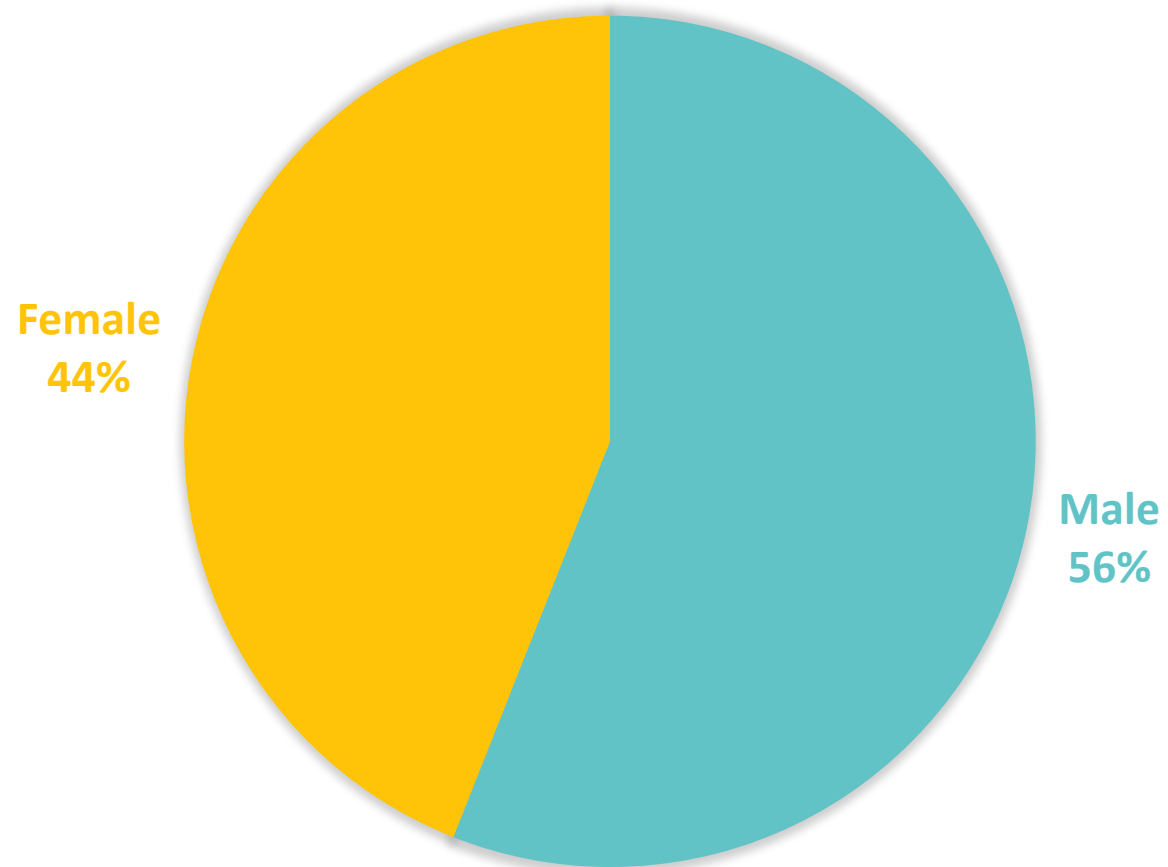


SECTION 1

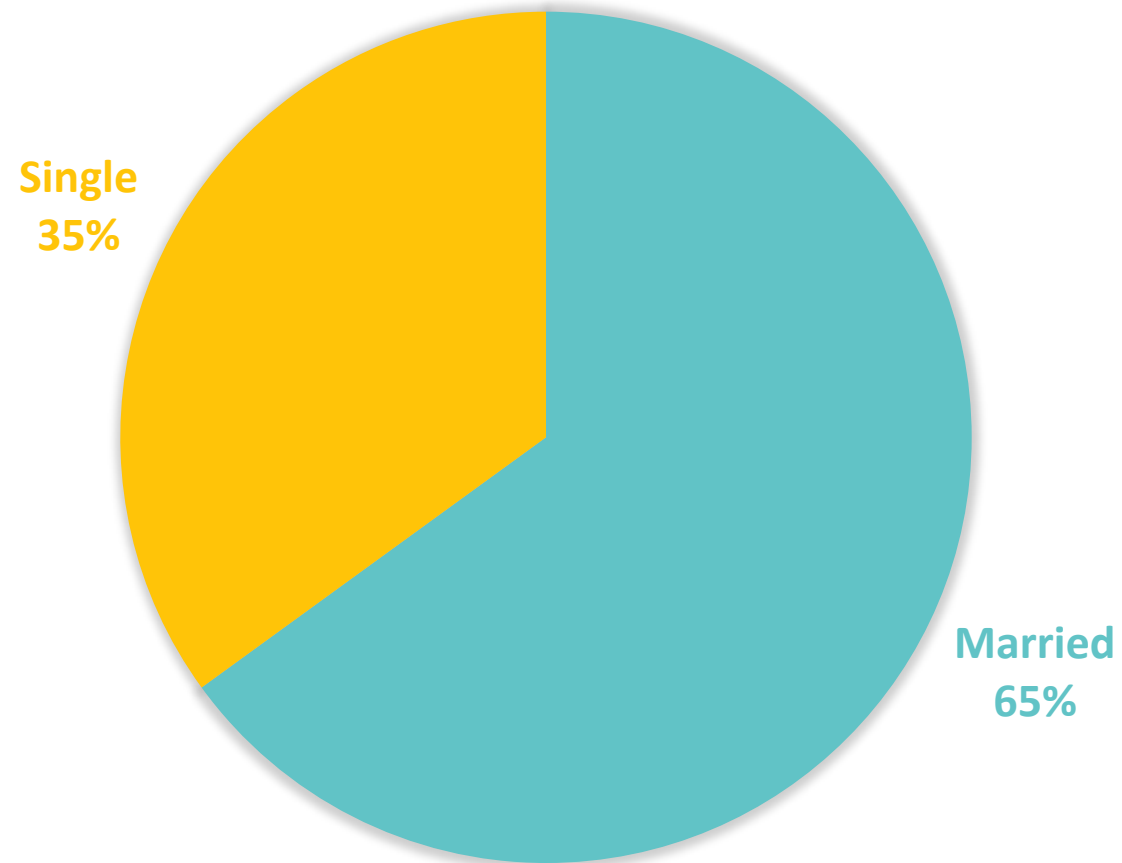
PROFILE OF RESPONDENTS



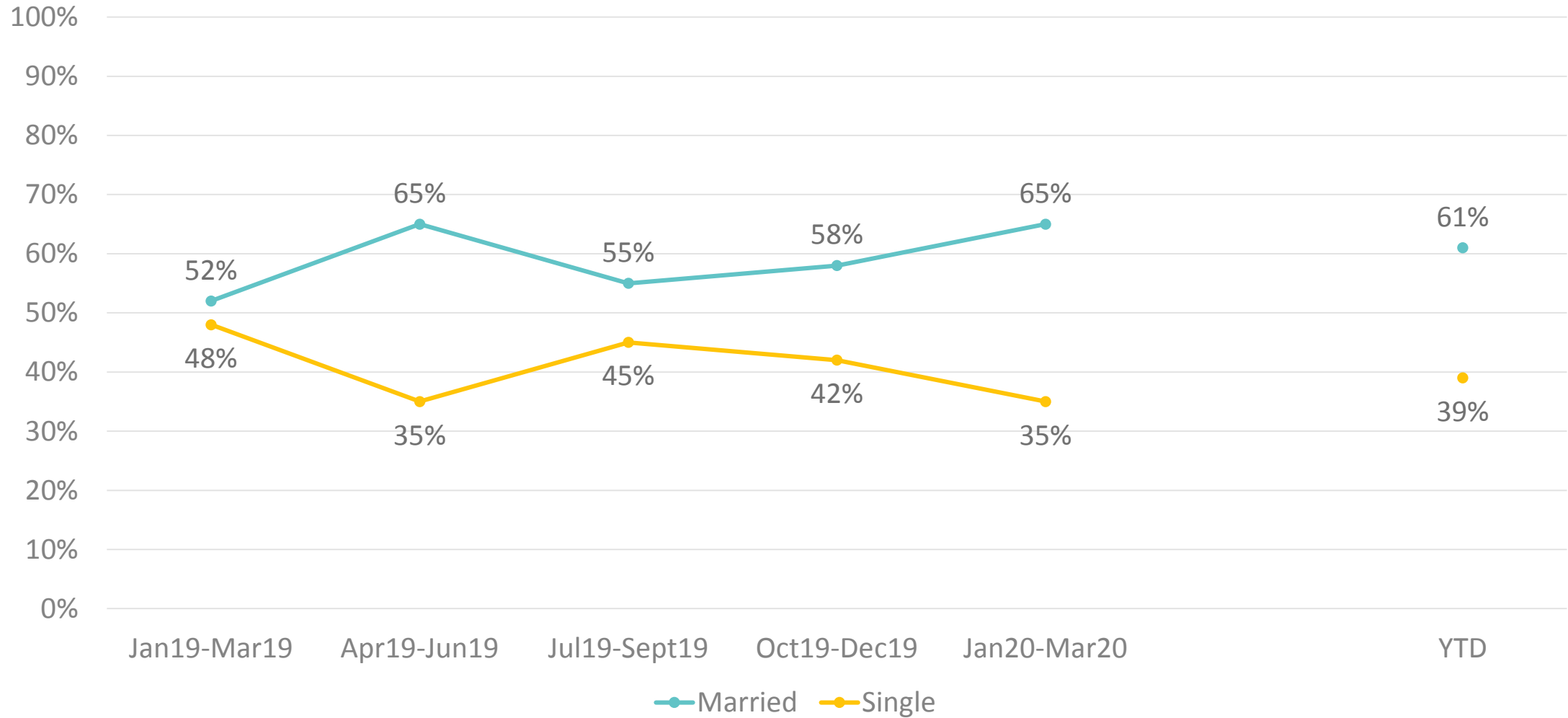
GENDER



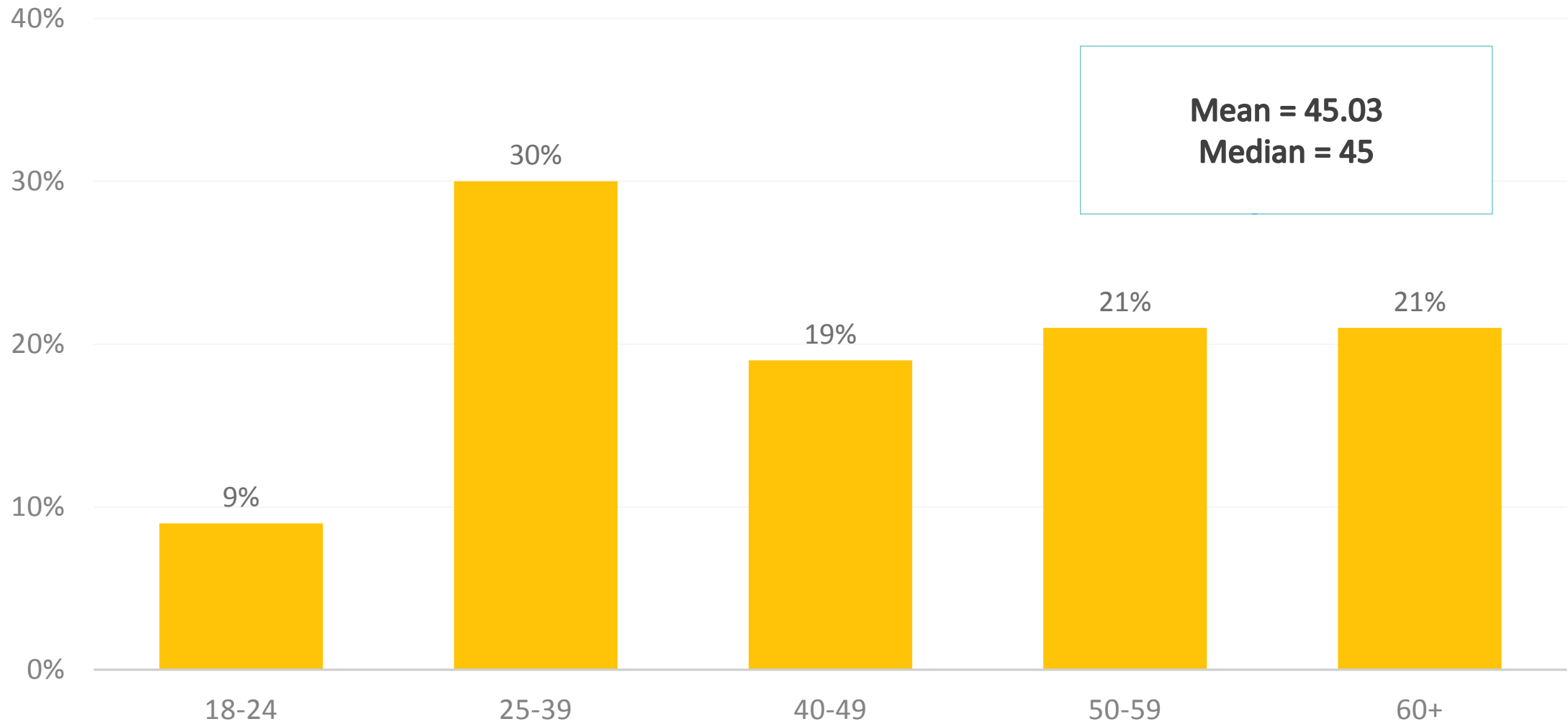
MARITAL STATUS



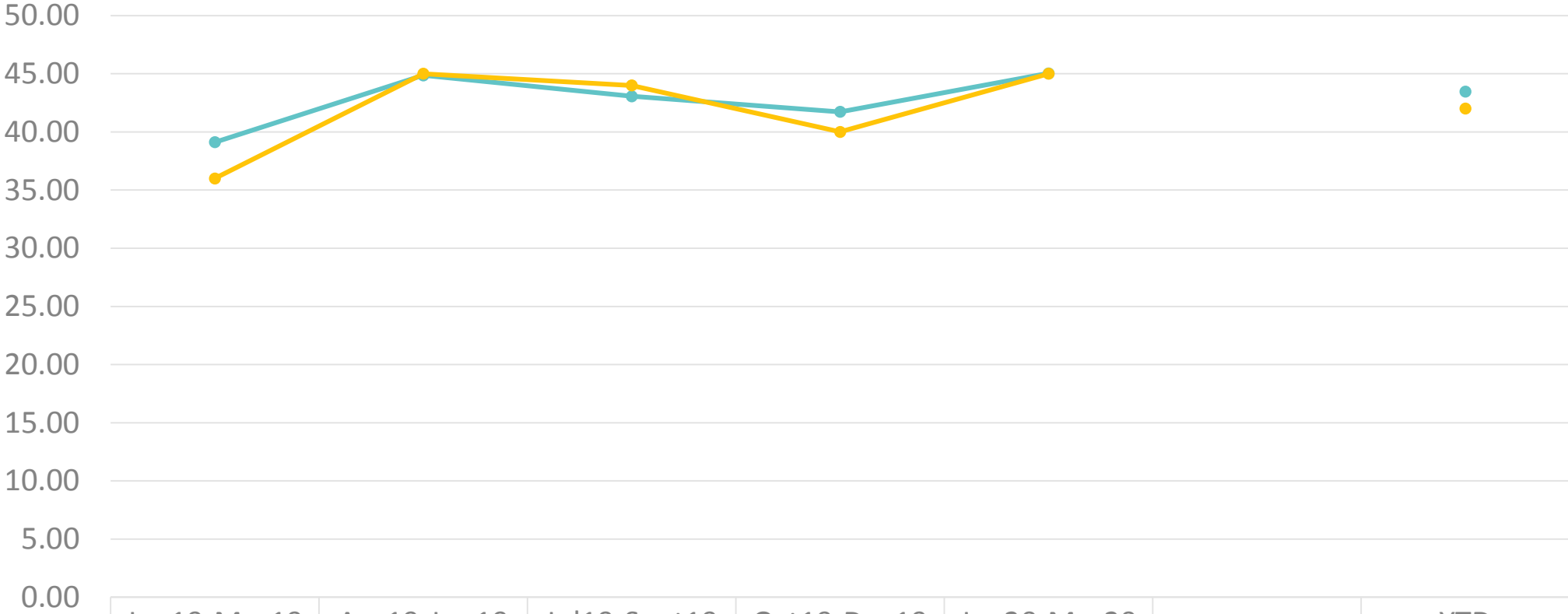
MARITAL STATUS – TRACKING



AGE



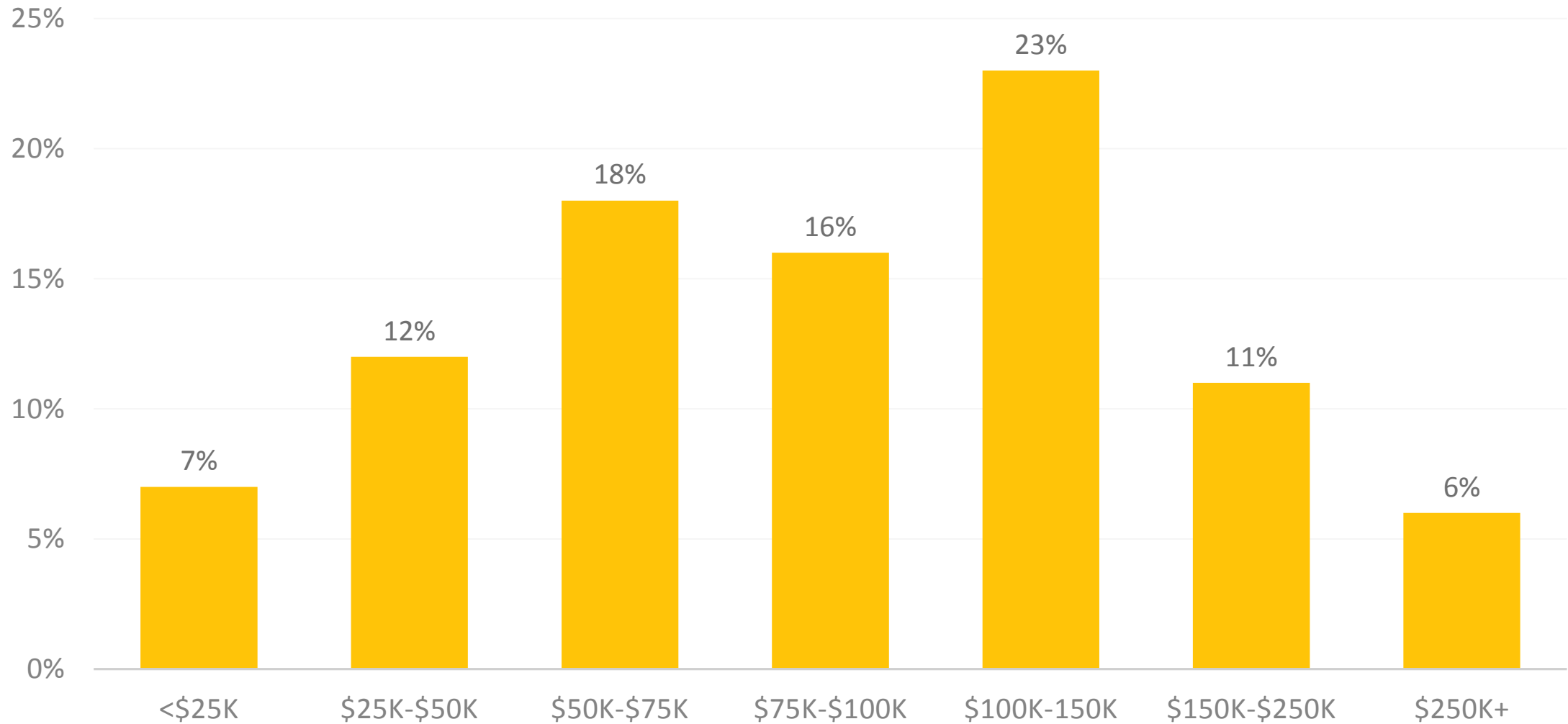
AGE – TRACKING



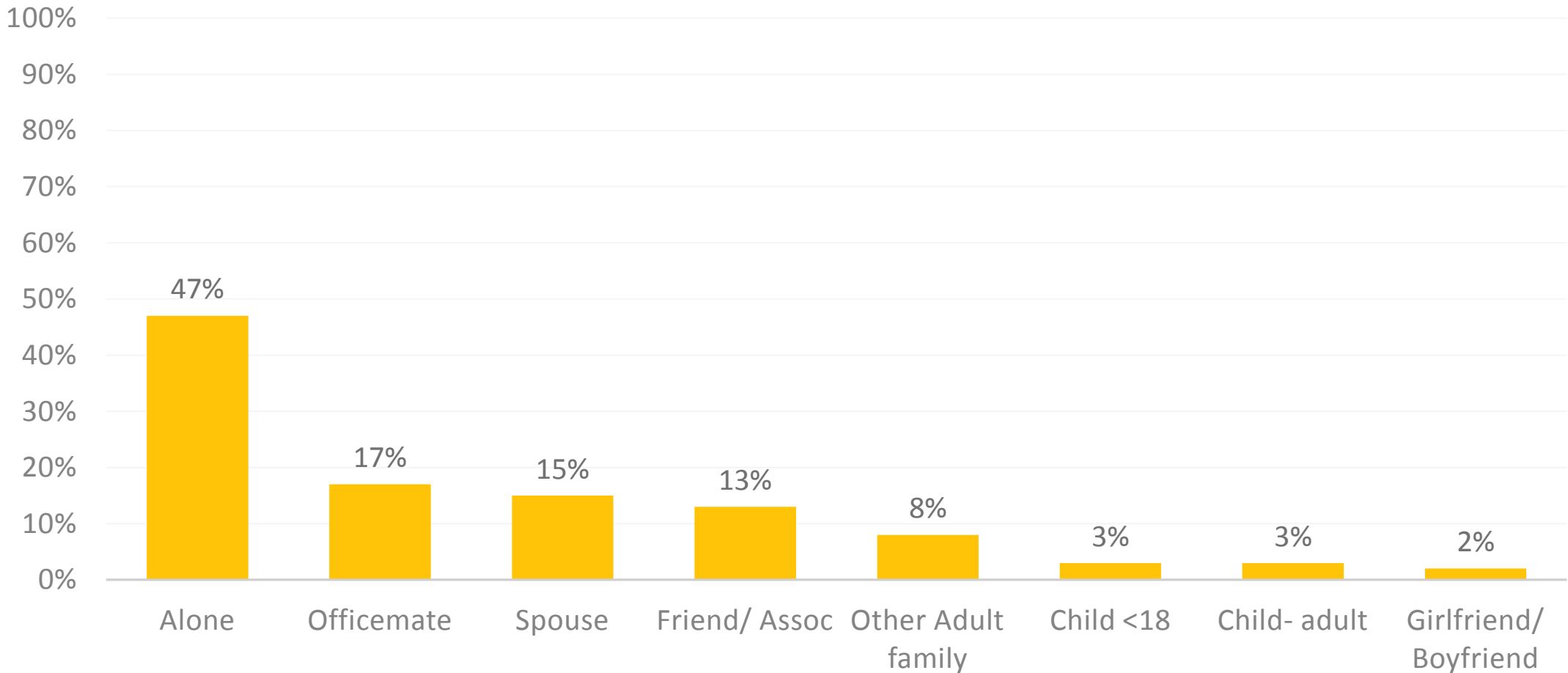
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20	YTD
MEAN	39.11	44.86	43.06	41.73	45.03	43.47
MEDIAN	36	45	44	40	45	42



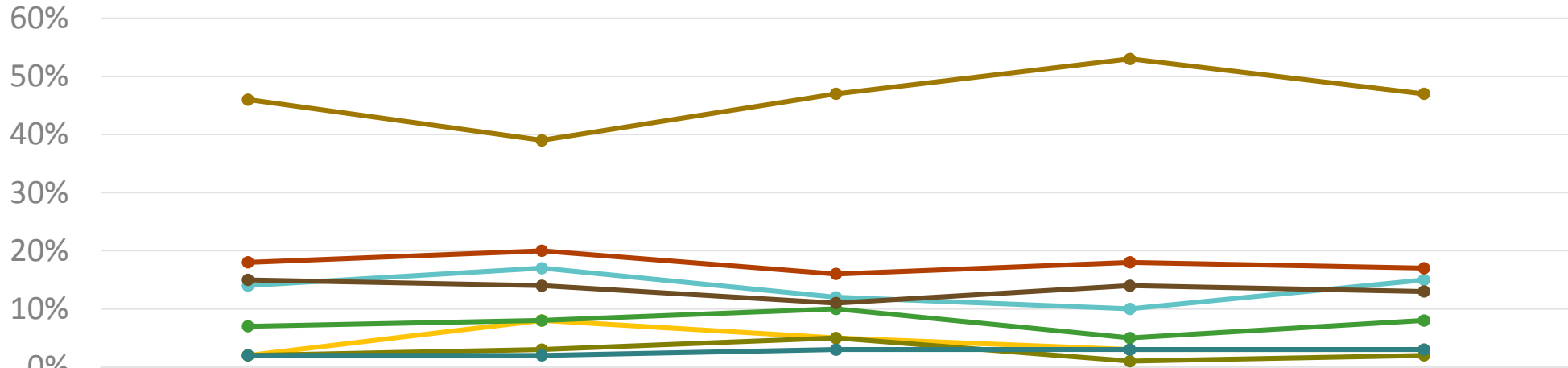
HOUSEHOLD INCOME



TRAVEL PARTY



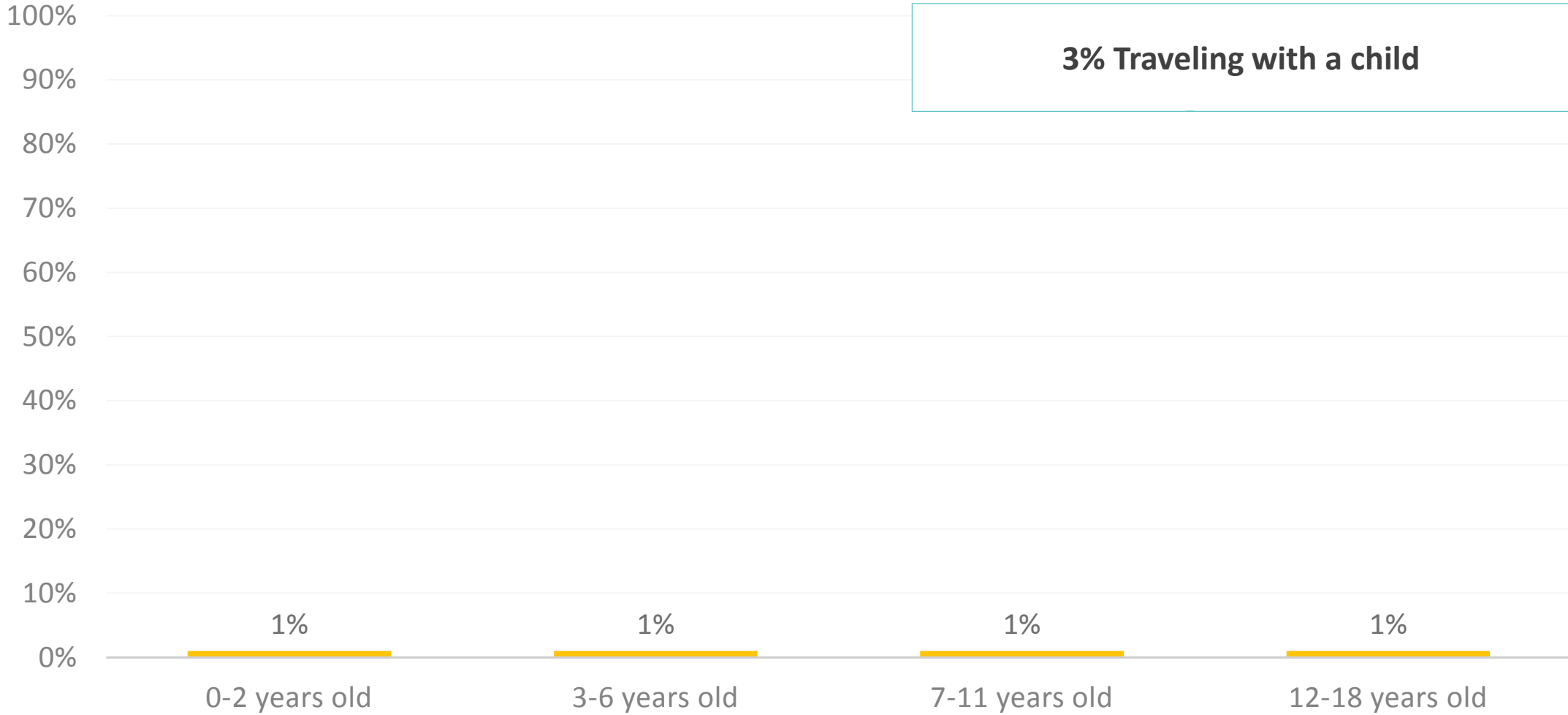
TRAVEL PARTY – TRACKING



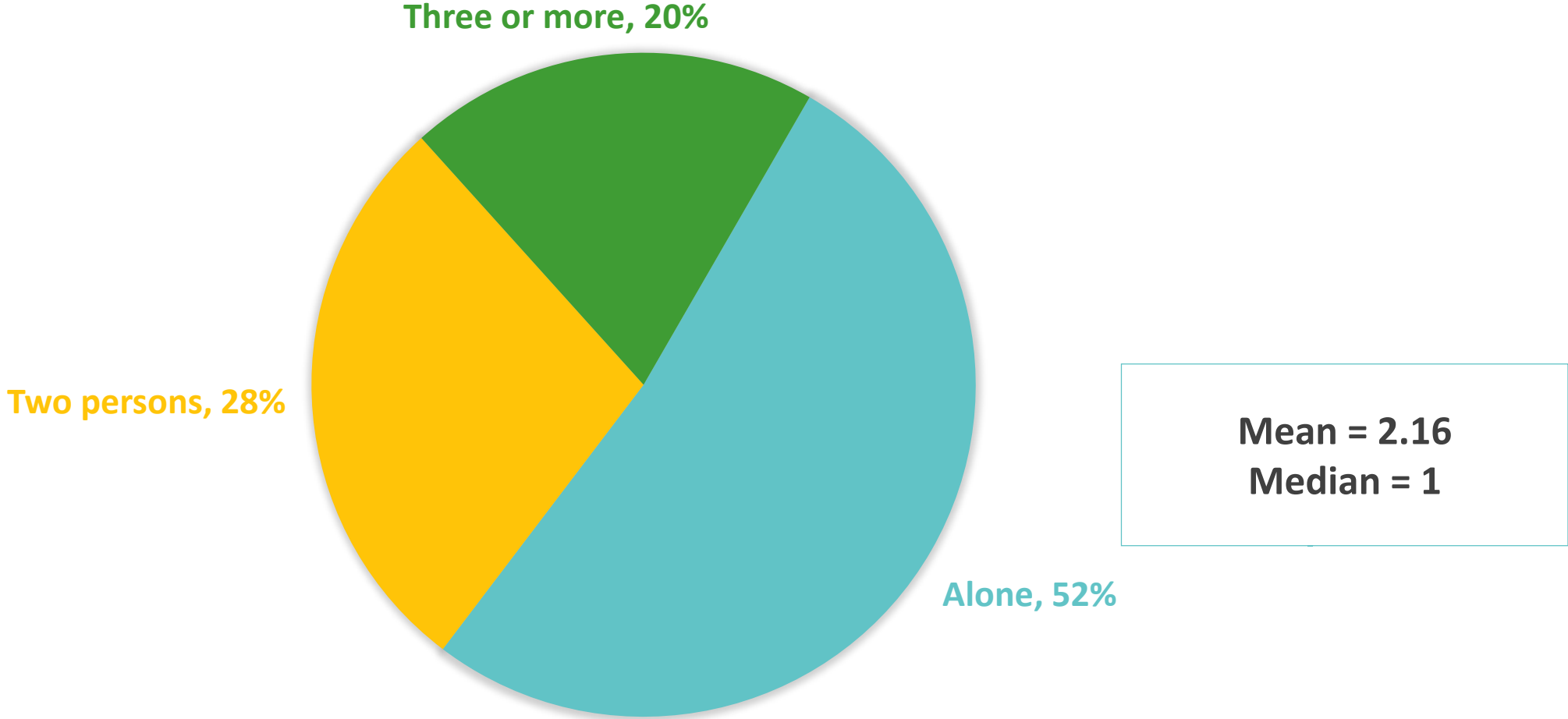
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20
Spouse	14%	17%	12%	10%	15%
Child<18	2%	8%	5%	3%	3%
Adult family	7%	8%	10%	5%	8%
Friend/ Assoc	15%	14%	11%	14%	13%
GF/BF	2%	3%	5%	1%	2%
Officemate	18%	20%	16%	18%	17%
Child- adult	2%	2%	3%	3%	3%
Alone	46%	39%	47%	53%	47%



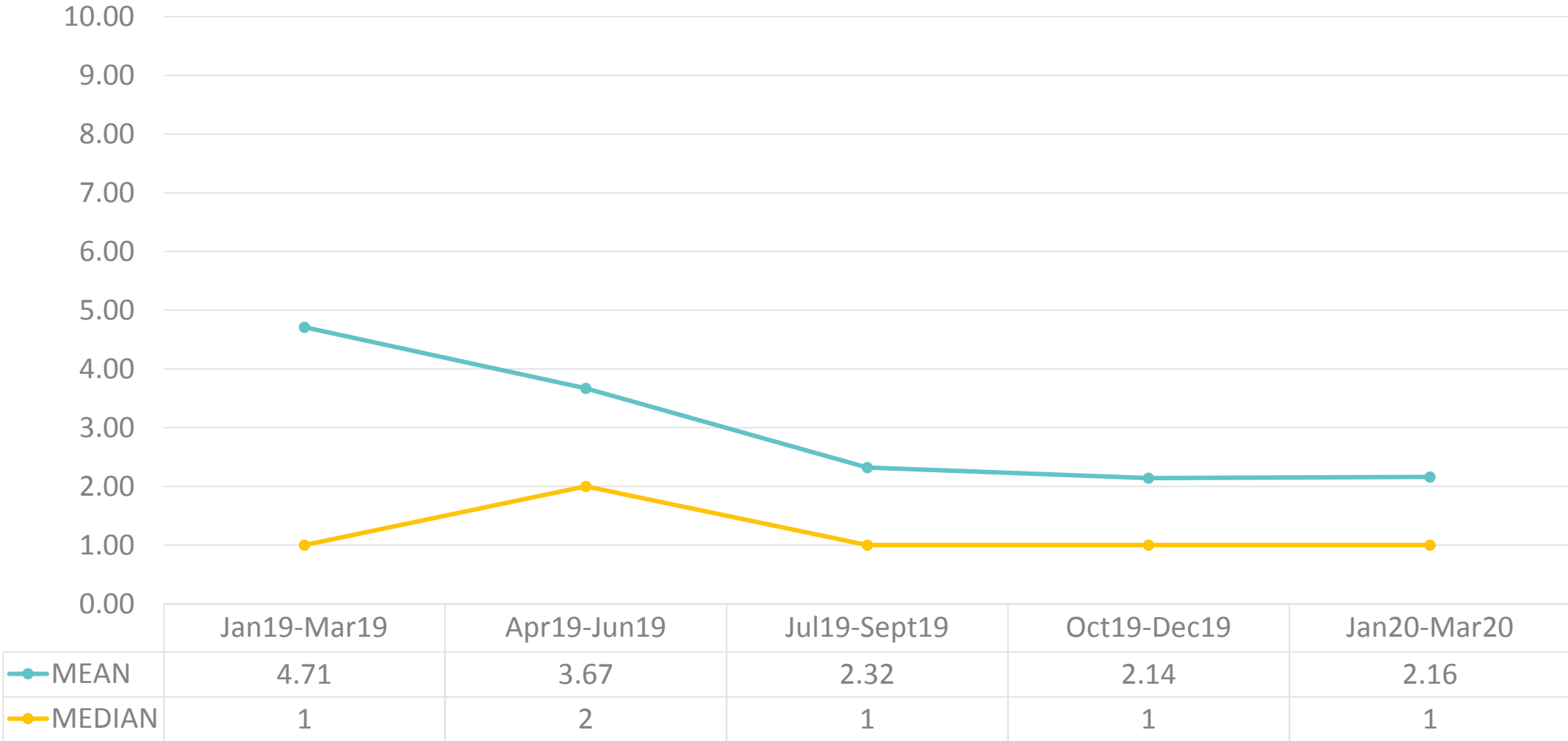
TRAVEL PARTY – CHILD UNDER 18



TRAVEL PARTY SIZE



TRAVEL PARTY SIZE – TRACKING



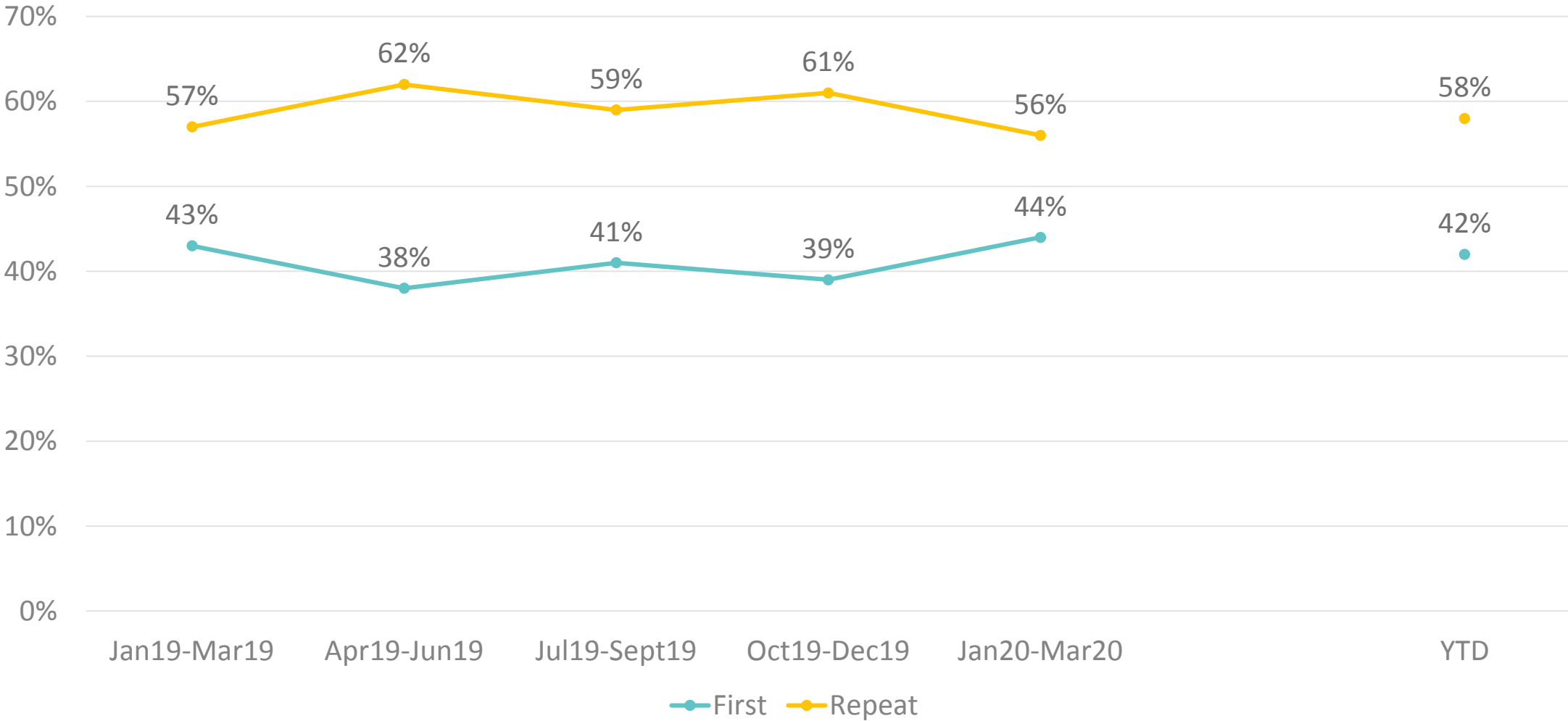
TRIPS TO GUAM



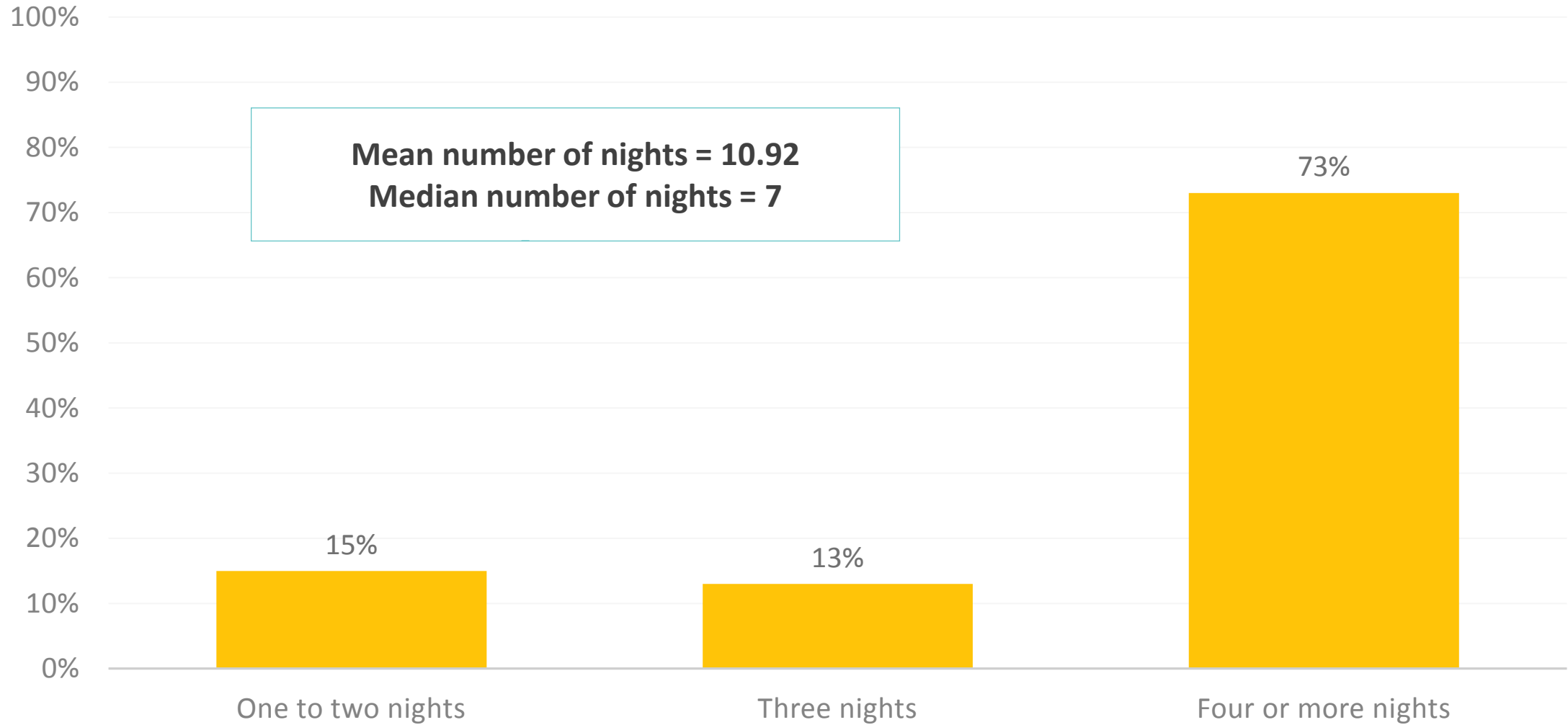
Mean = 5.03
Median = 2



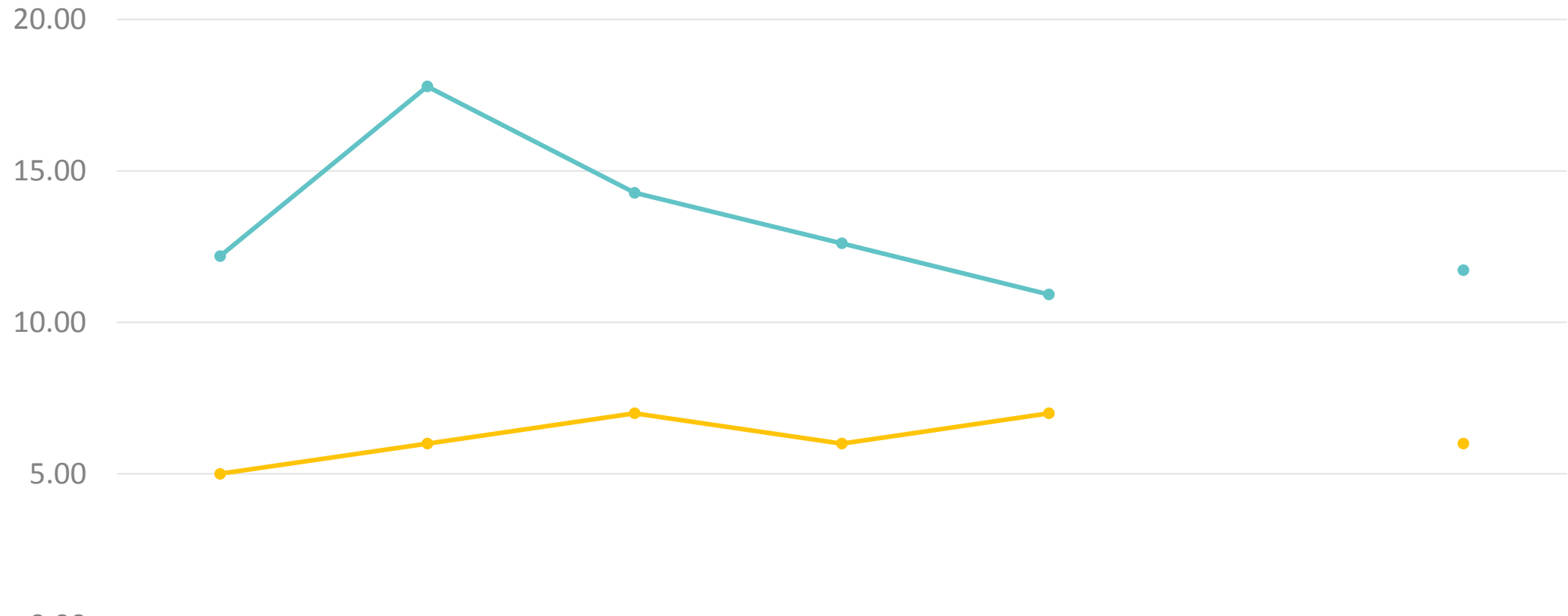
TRIPS TO GUAM – TRACKING



LENGTH OF STAY

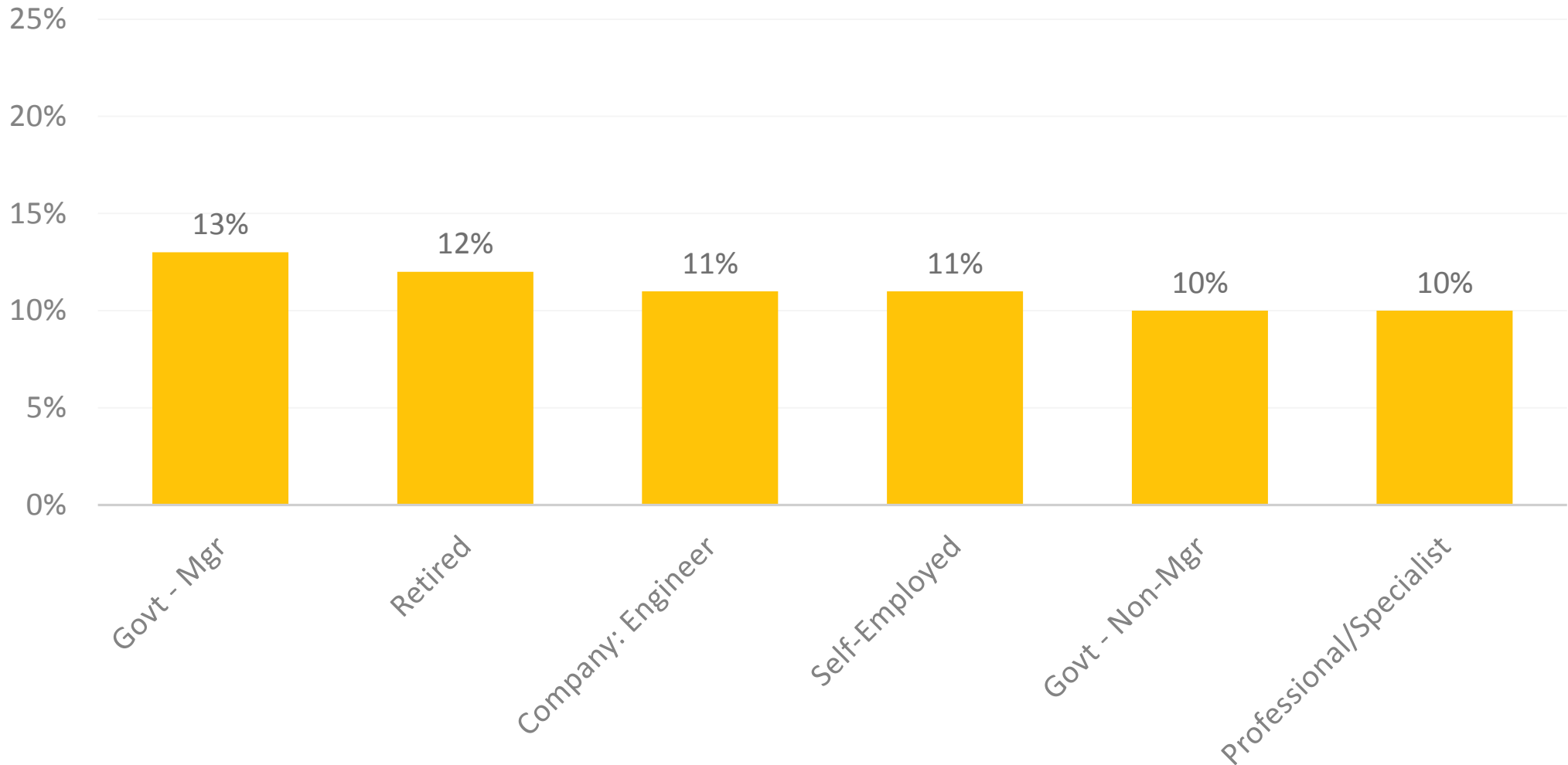


LENGTH OF STAY – TRACKING



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20	YTD
MEAN	12.19	17.79	14.28	12.61	10.92	11.72
MEDIAN	5	6	7	6	7	6

OCCUPATION – Top Responses (10%+)



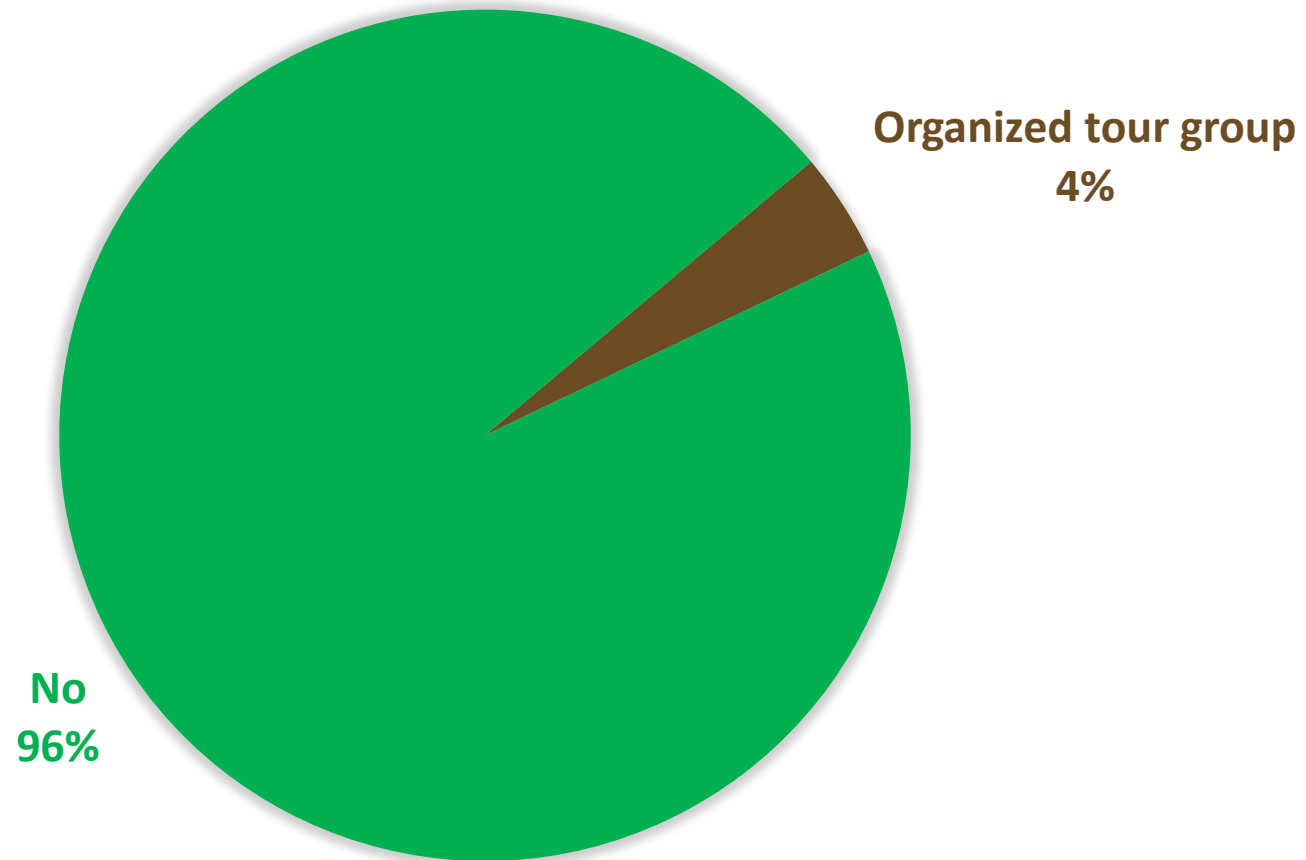


SECTION 2

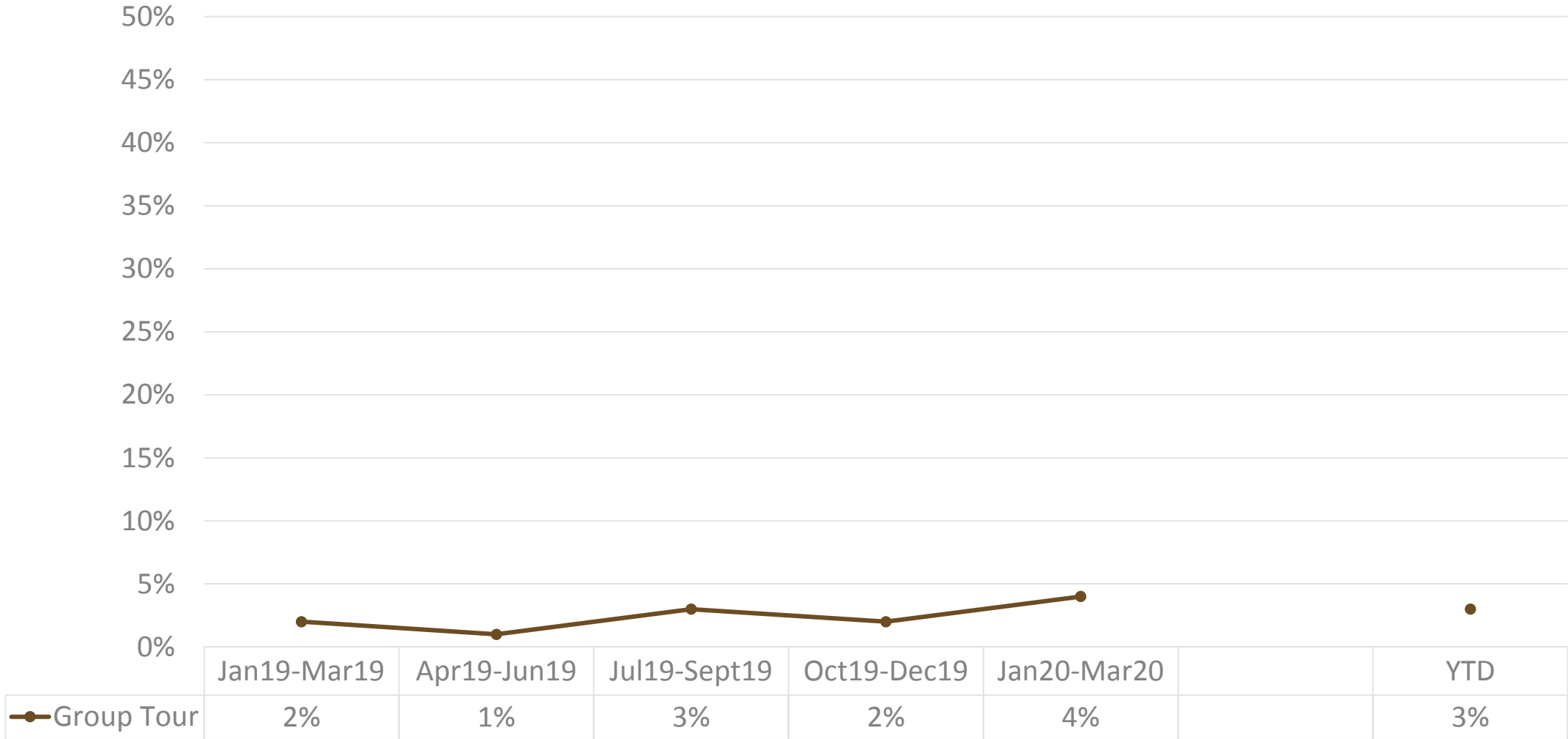
TRAVEL PLANNING



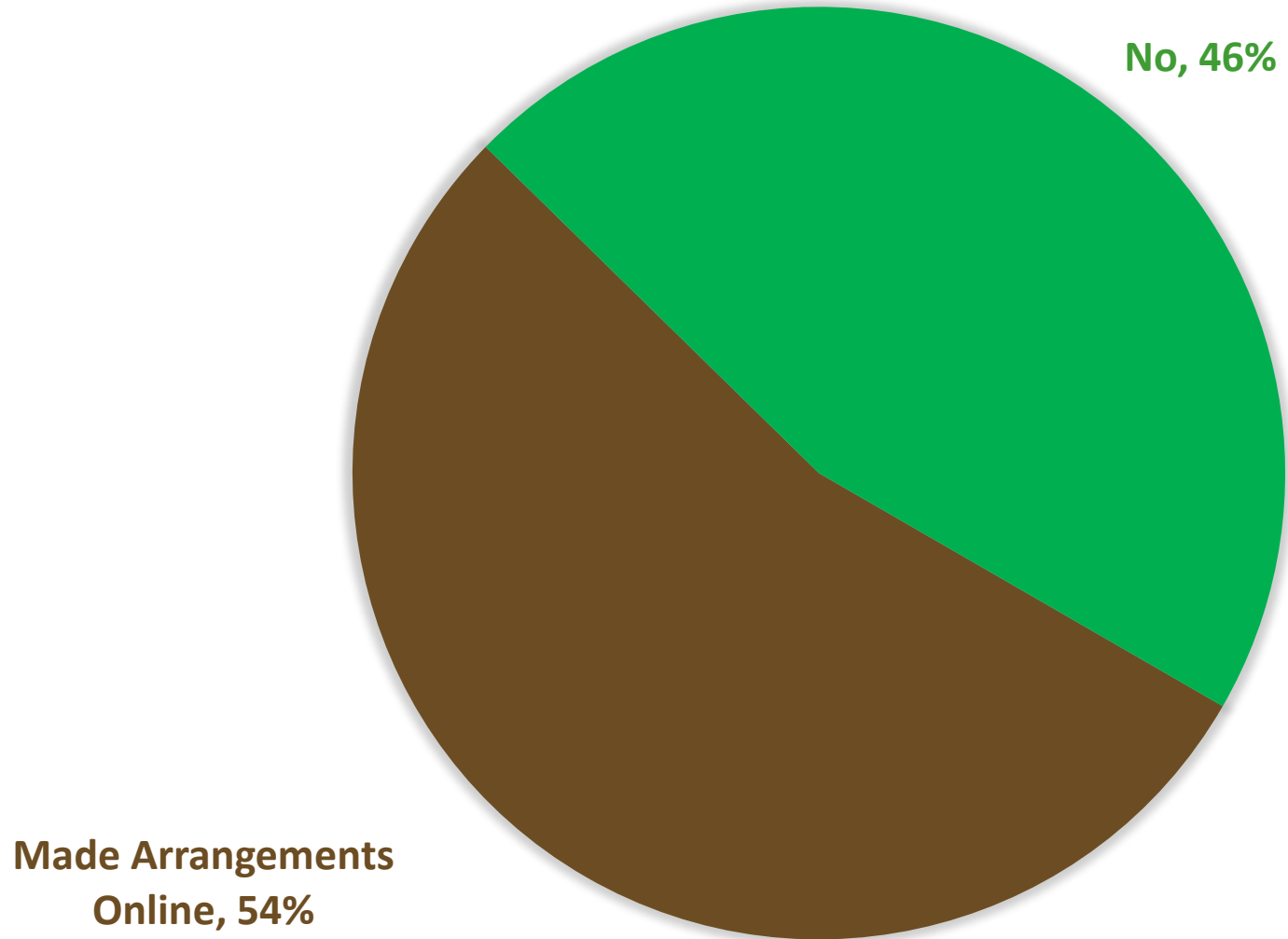
ORGANIZED TOUR GROUP



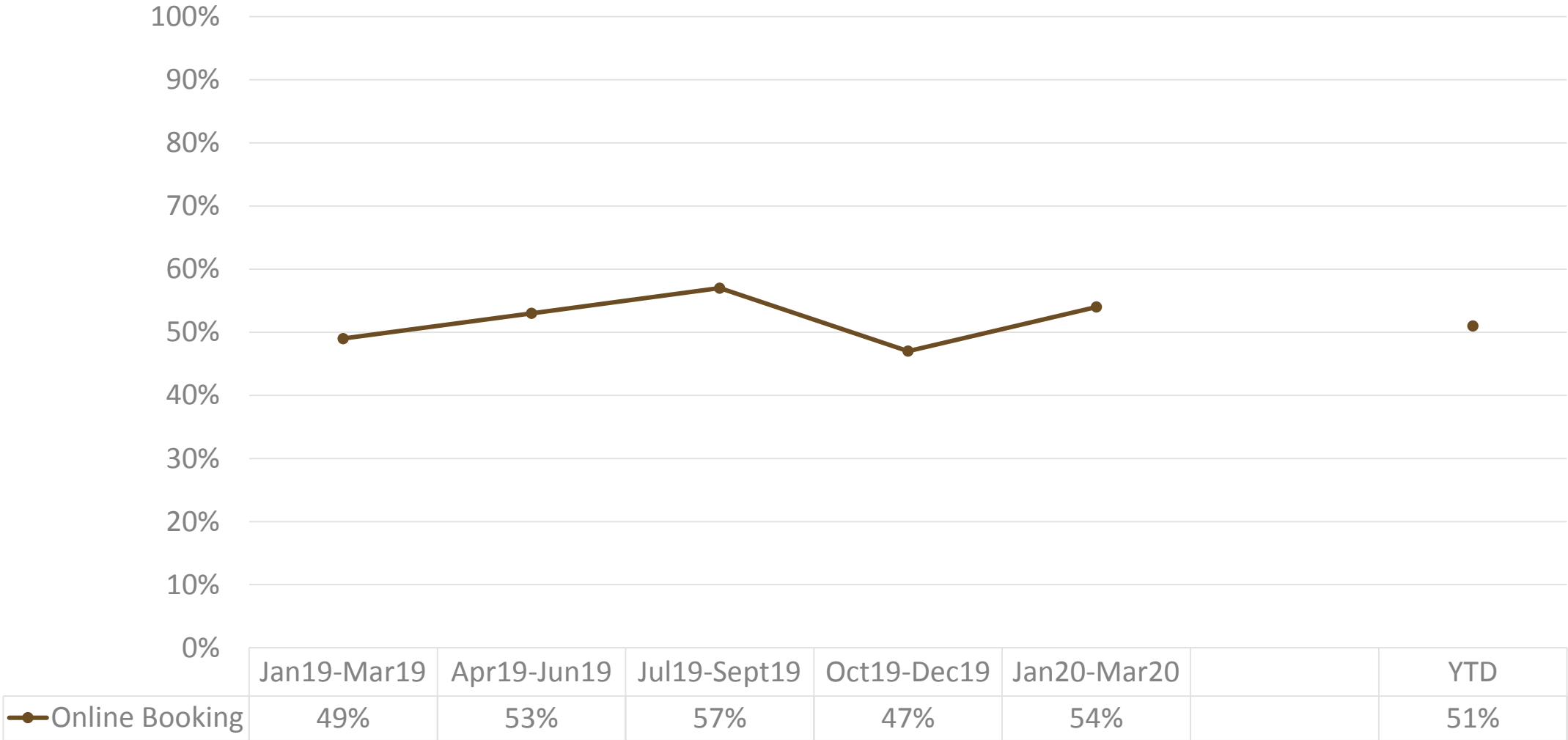
ORGANIZED TOUR GROUP – TRACKING



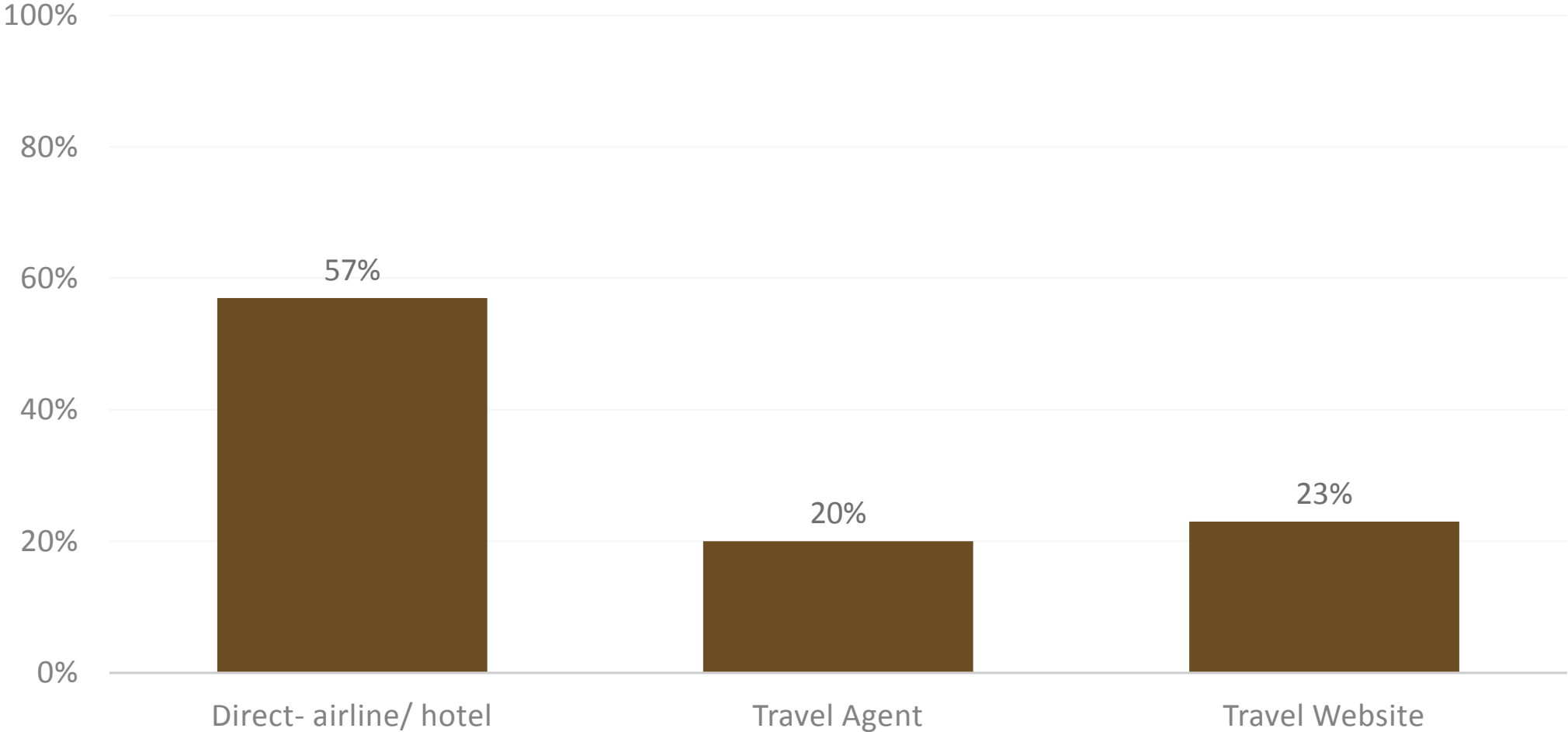
ONLINE BOOKING



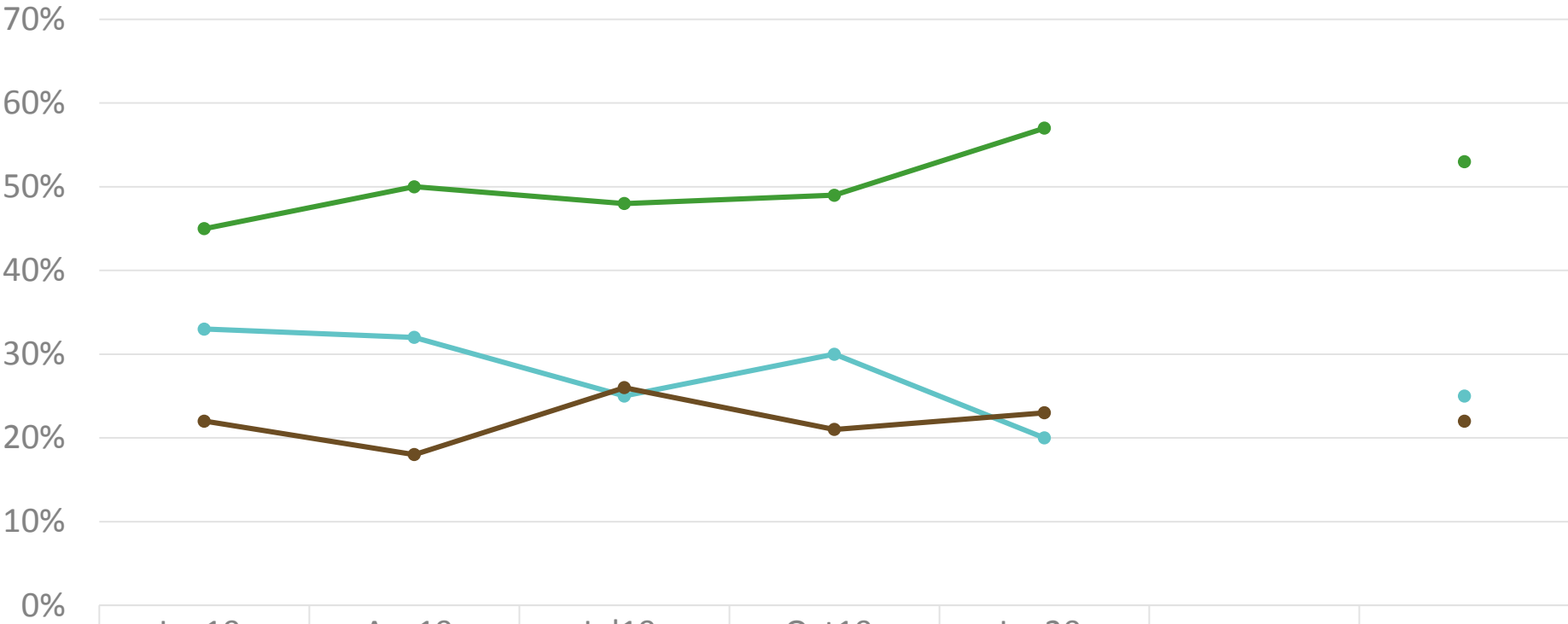
ONLINE BOOKING – TRACKING



TRAVEL ARRANGEMENTS



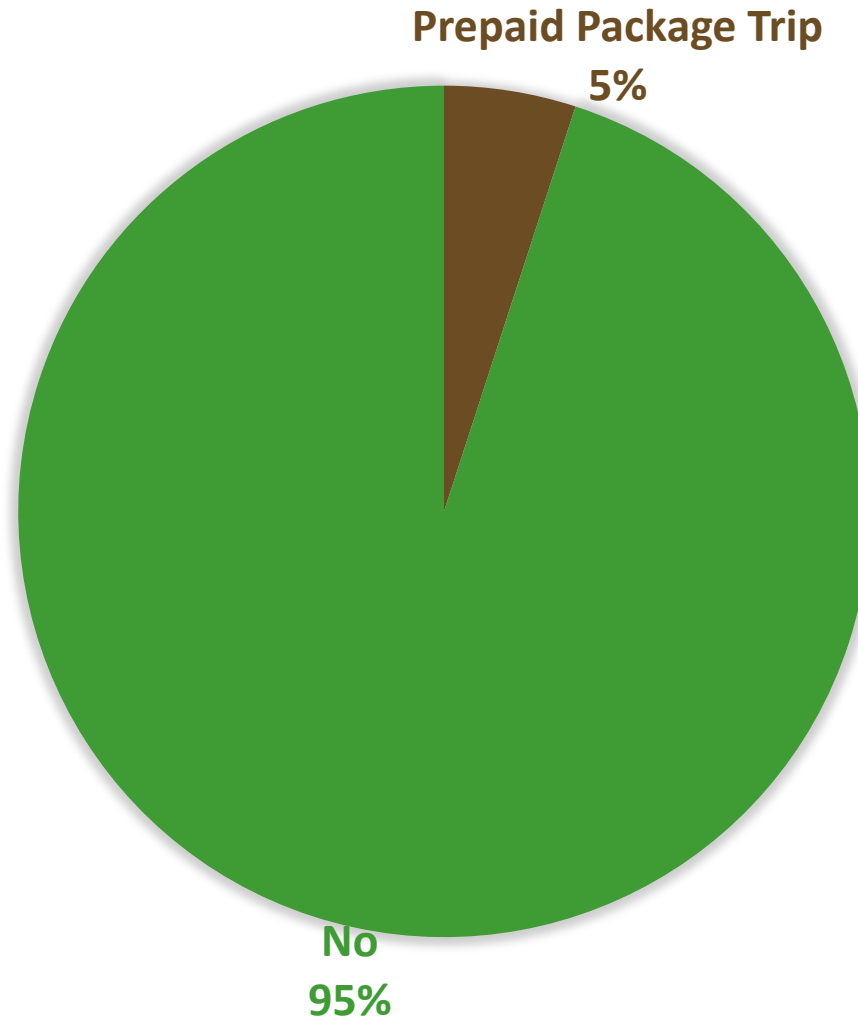
TRAVEL ARRANGEMENTS – TRACKING



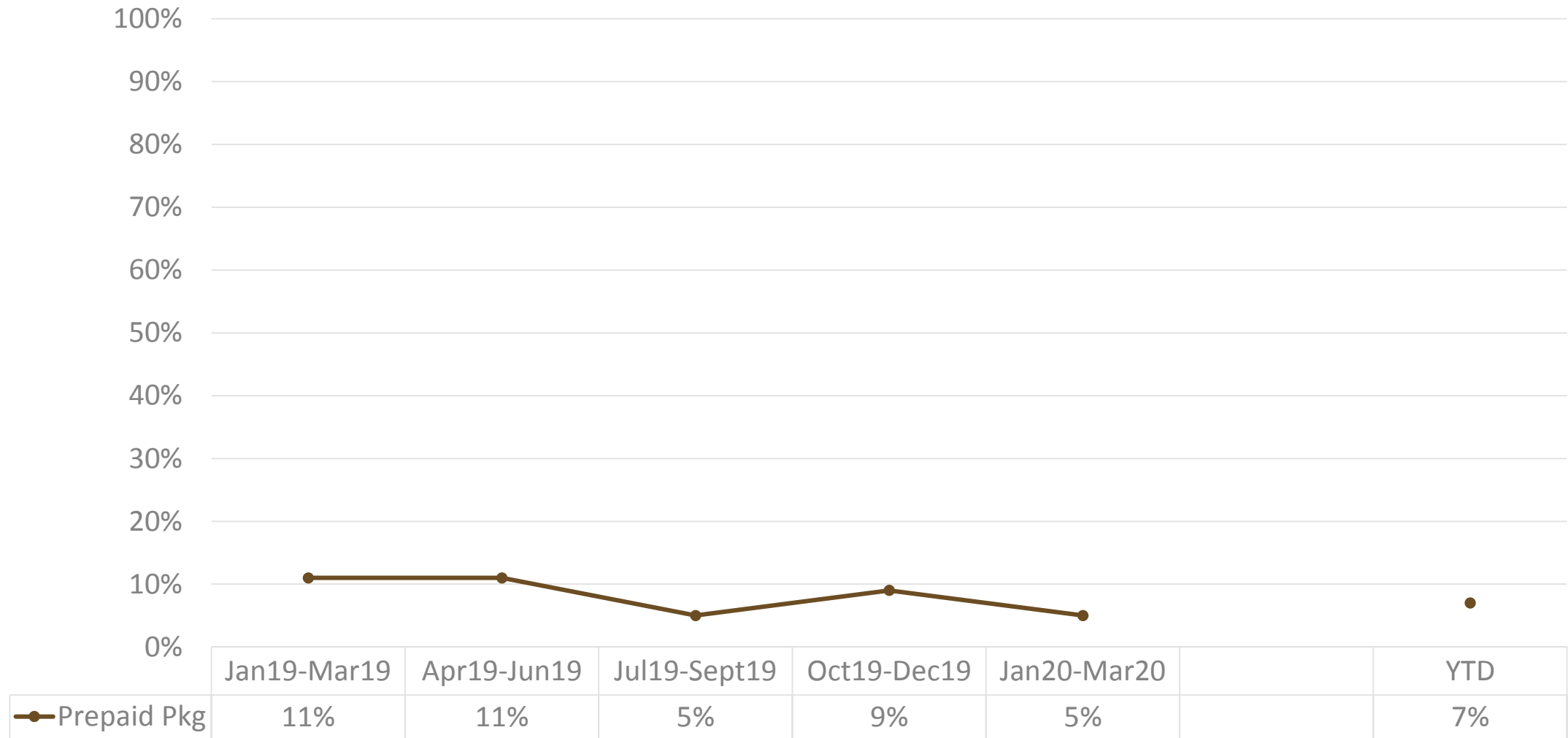
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20		YTD
Travel Agent	33%	32%	25%	30%	20%		25%
Travel Website	22%	18%	26%	21%	23%		22%
Direct- Airline/ Hotel	45%	50%	48%	49%	57%		53%



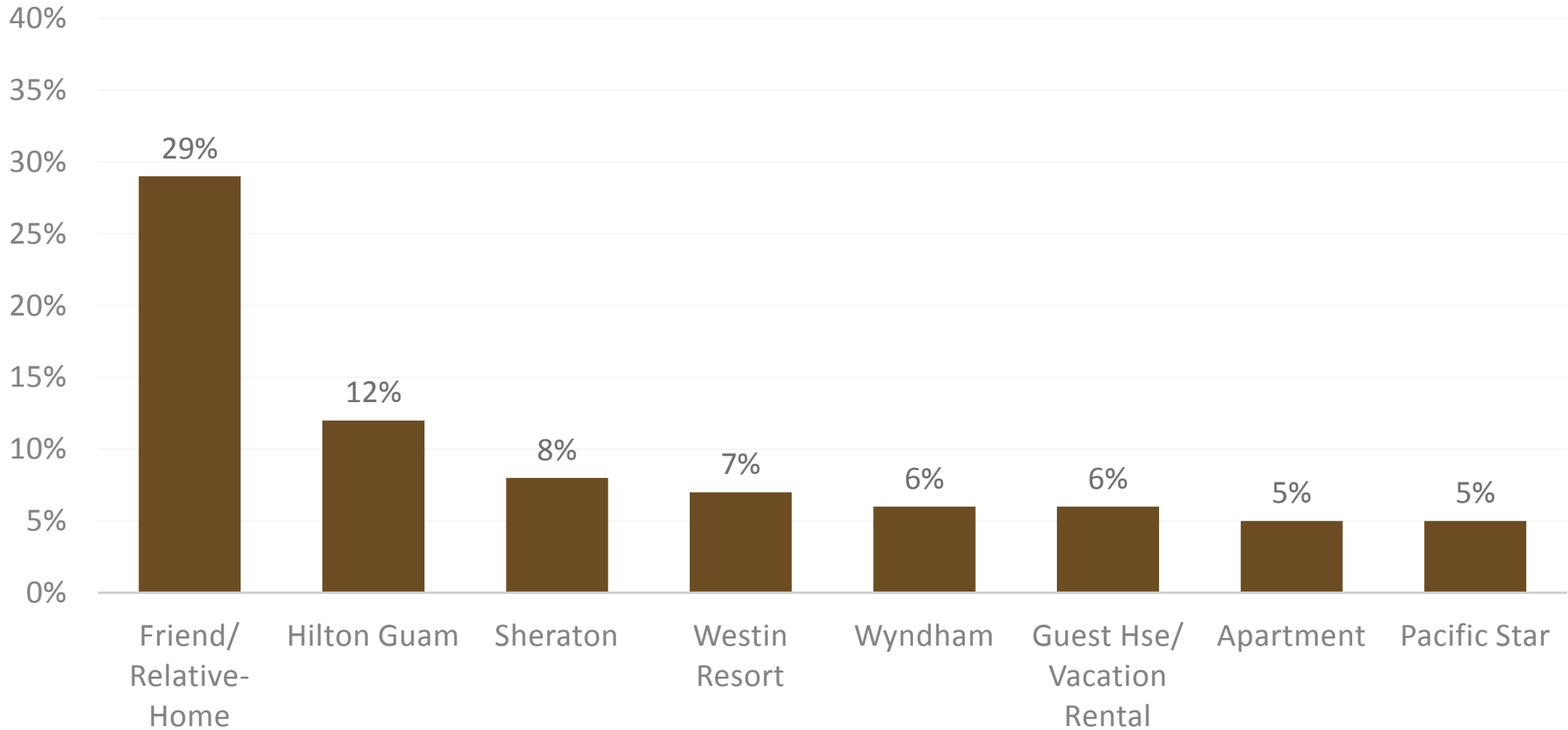
PREPAID PACKAGE TRIP



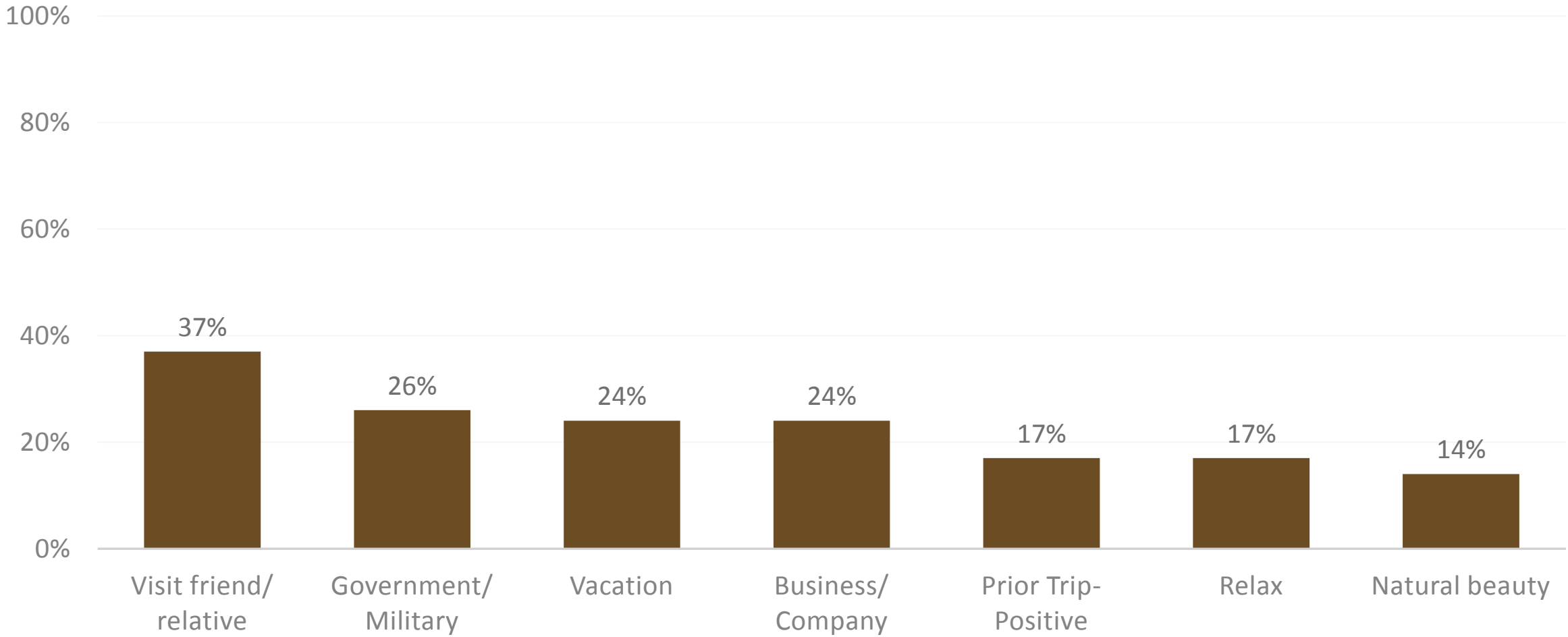
PREPAID PACKAGE TRIP



ACCOMMODATIONS (5%+)



TRAVEL MOTIVATIONS (10%+)





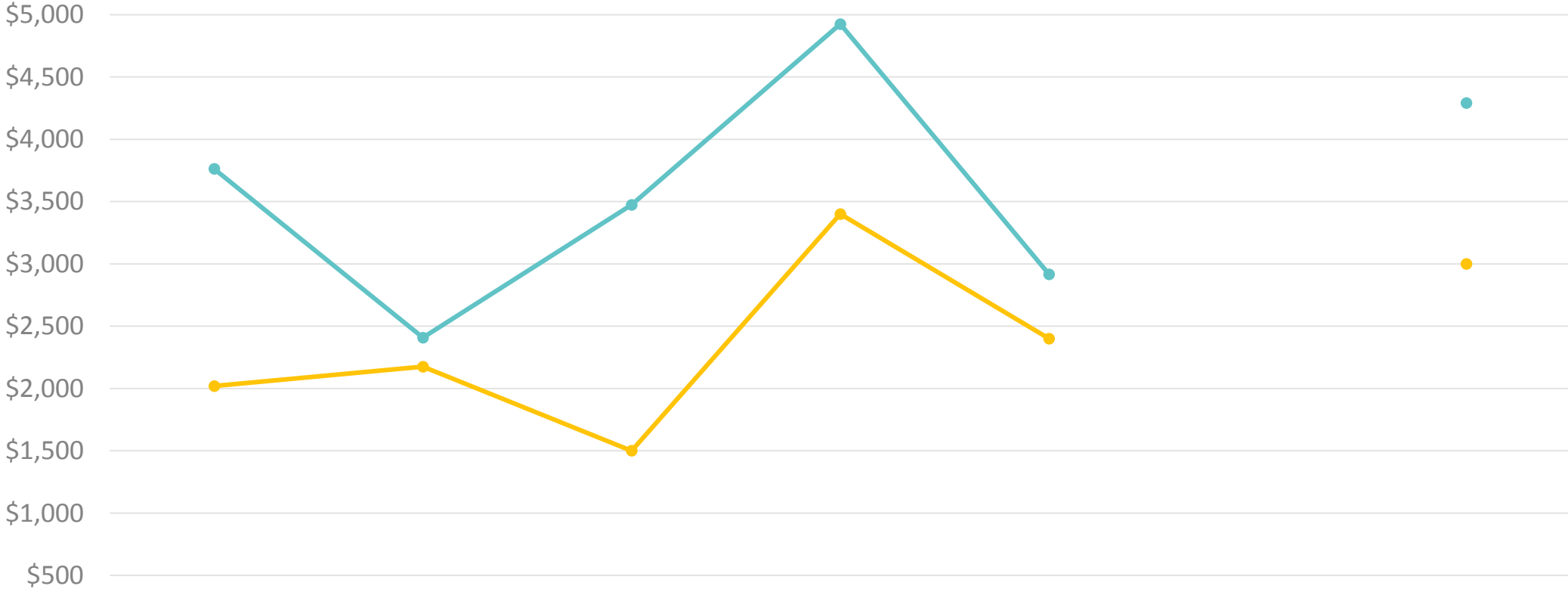
SECTION 3
EXPENDITURES



PREPAID PACKAGE EXPENDITURES

- \$2,916.67 = overall mean average prepaid package expense (for entire travel party) by respondent
- \$1,975.76 = overall mean average **per person** prepaid package expenditures

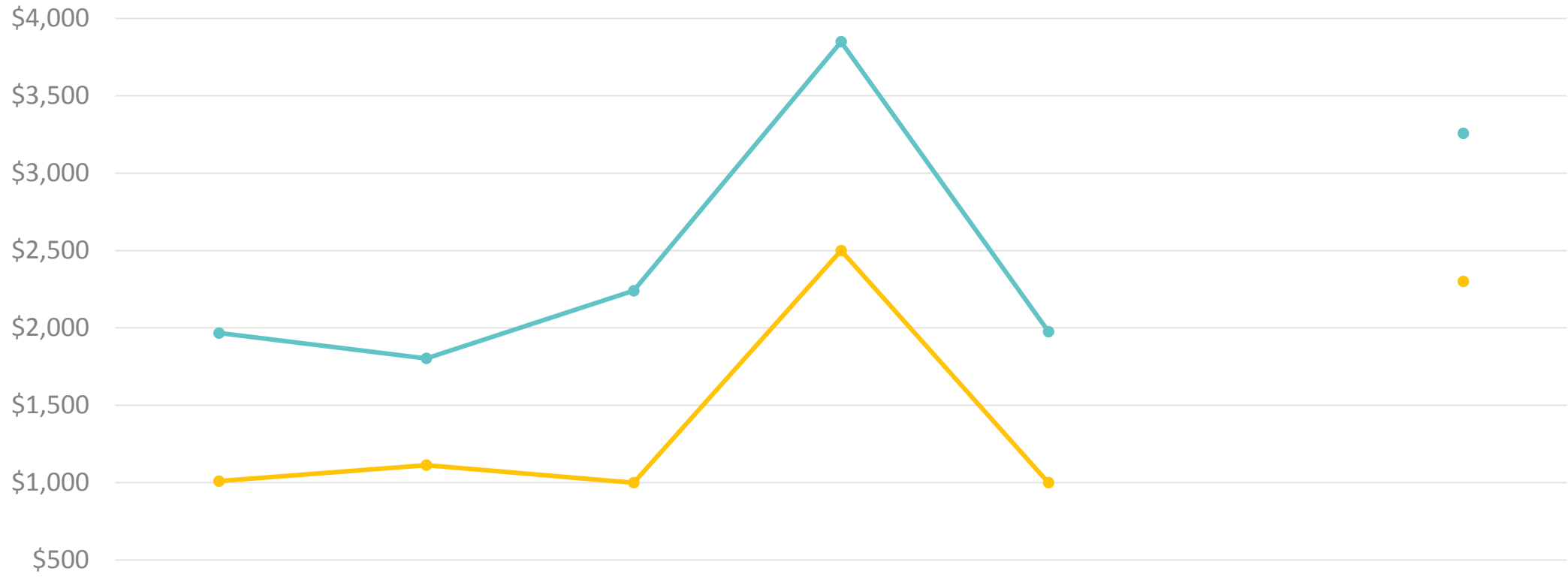
PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20		YTD
MEAN	\$3,762.27	\$2,407.86	\$3,474.22	\$4,924.62	\$2,916.67		\$4,290.53
MEDIAN	\$2,020.00	\$2,175.00	\$1,500.00	\$3,400.00	\$2,400.00		\$3,000.00



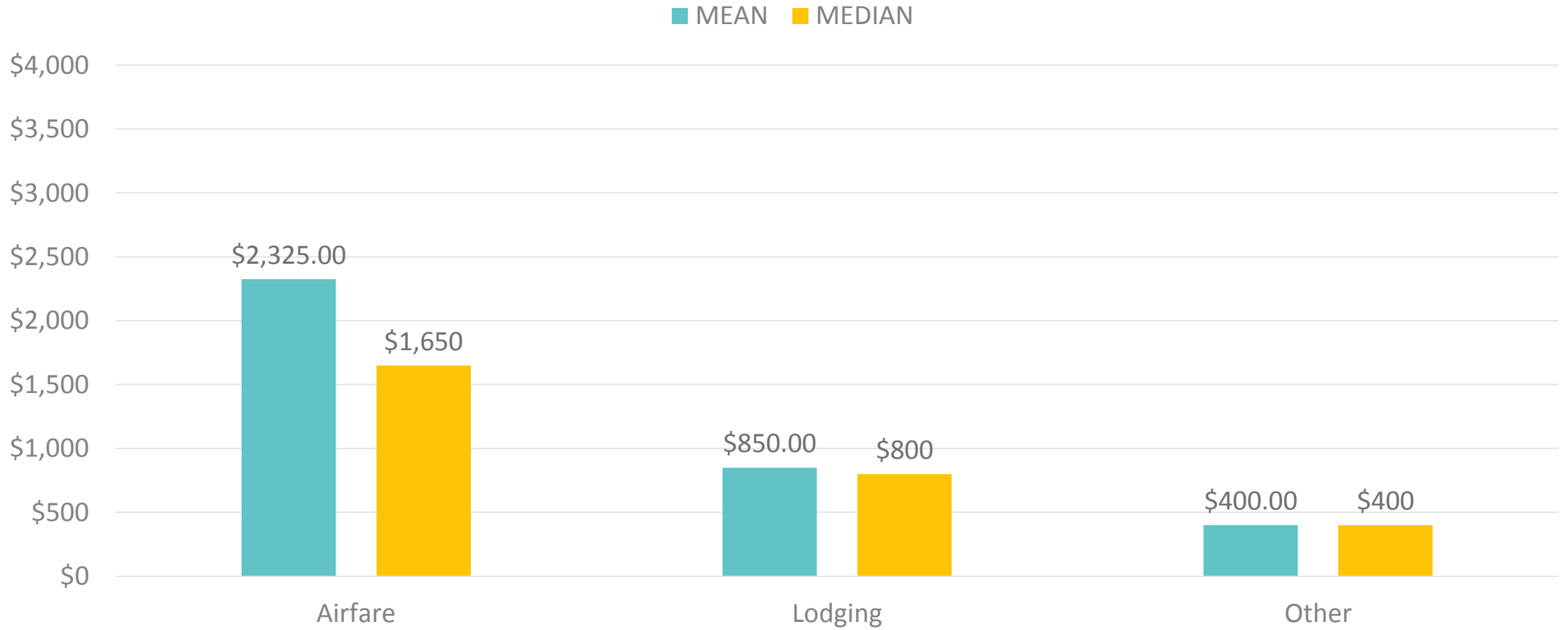
PREPAID PACKAGE – PER PERSON EXPENSE TRACKING



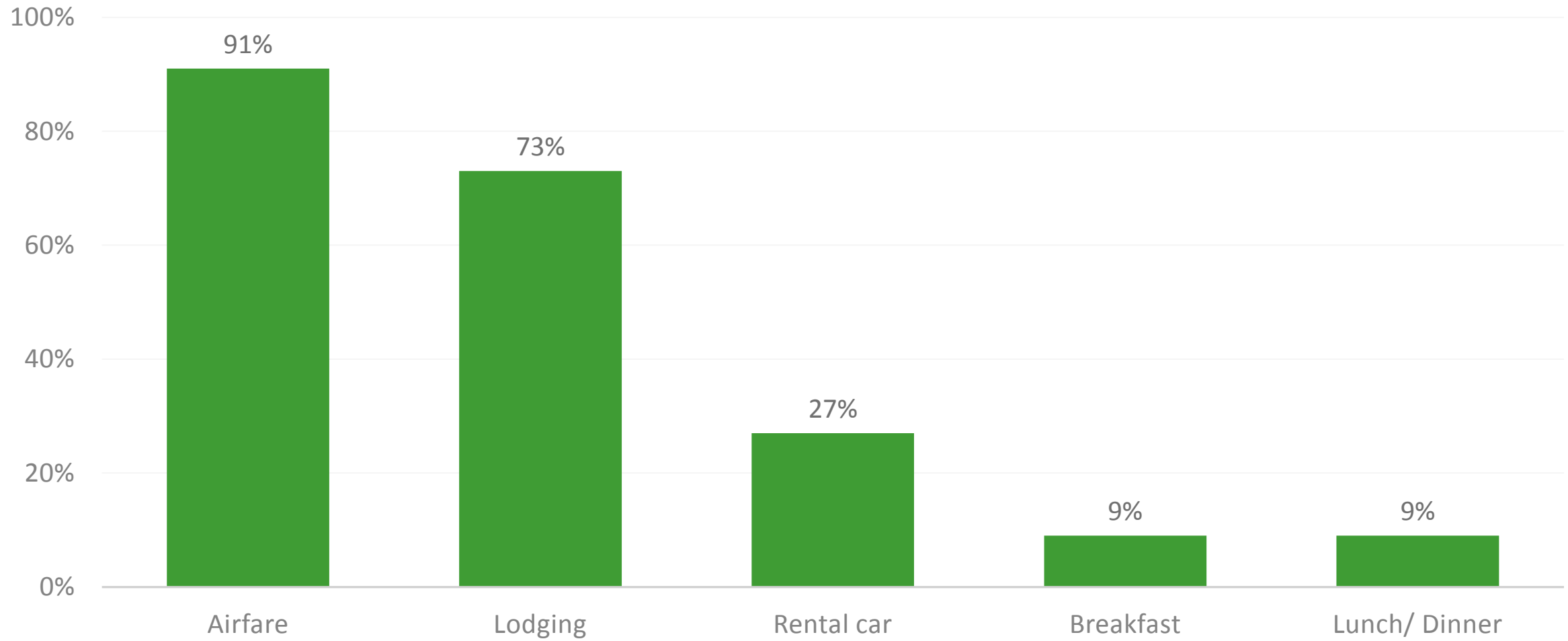
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20	YTD
MEAN	\$1,966.52	\$1,802.76	\$2,240.40	\$3,849.05	\$1,975.76	\$3,257.48
MEDIAN	\$1,010.00	\$1,113.00	\$1,000.00	\$2,500.00	\$1,000.00	\$2,300.00



PREPAID PACKAGE – BREAKDOWN



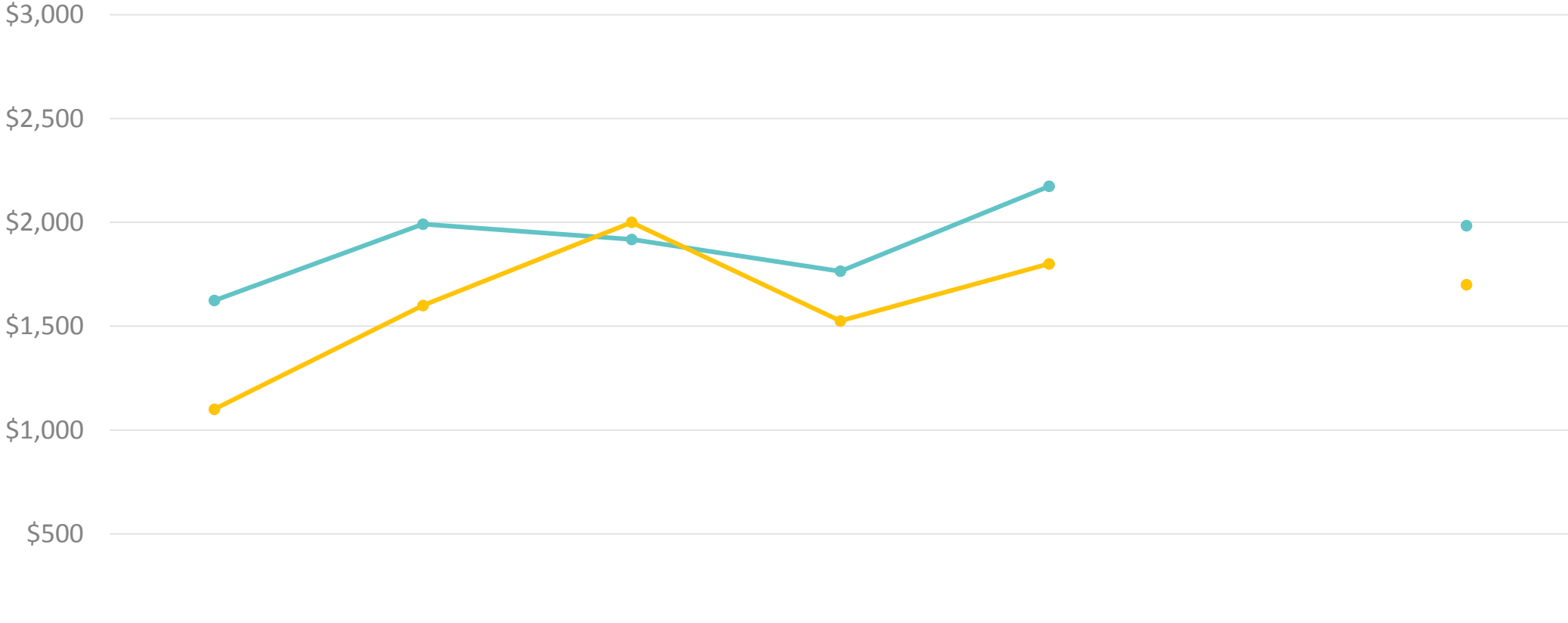
PREPAID PACKAGE – BREAKDOWN



AIRFARE – FIT TRAVELER

- \$2,173.32 = overall mean average airfare expense (for entire travel party) by respondent
- \$1,567.90 = overall mean average **per person** airfare expenditures

AIRFARE – FIT TRAVELER (GROUP) TRACKING

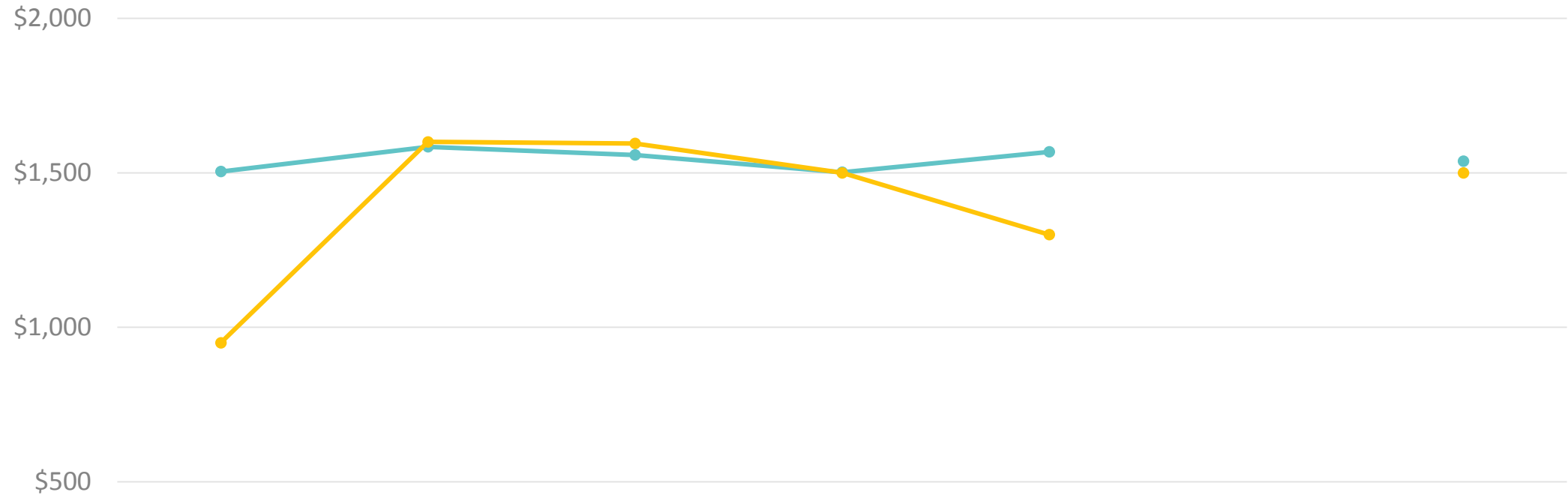


	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20	YTD
MEAN	\$1,623.45	\$1,991.05	\$1,917.95	\$1,764.36	\$2,173.32	\$1,984.22
MEDIAN	\$1,100.00	\$1,600.00	\$2,000.00	\$1,525.00	\$1,800.00	\$1,700.00

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

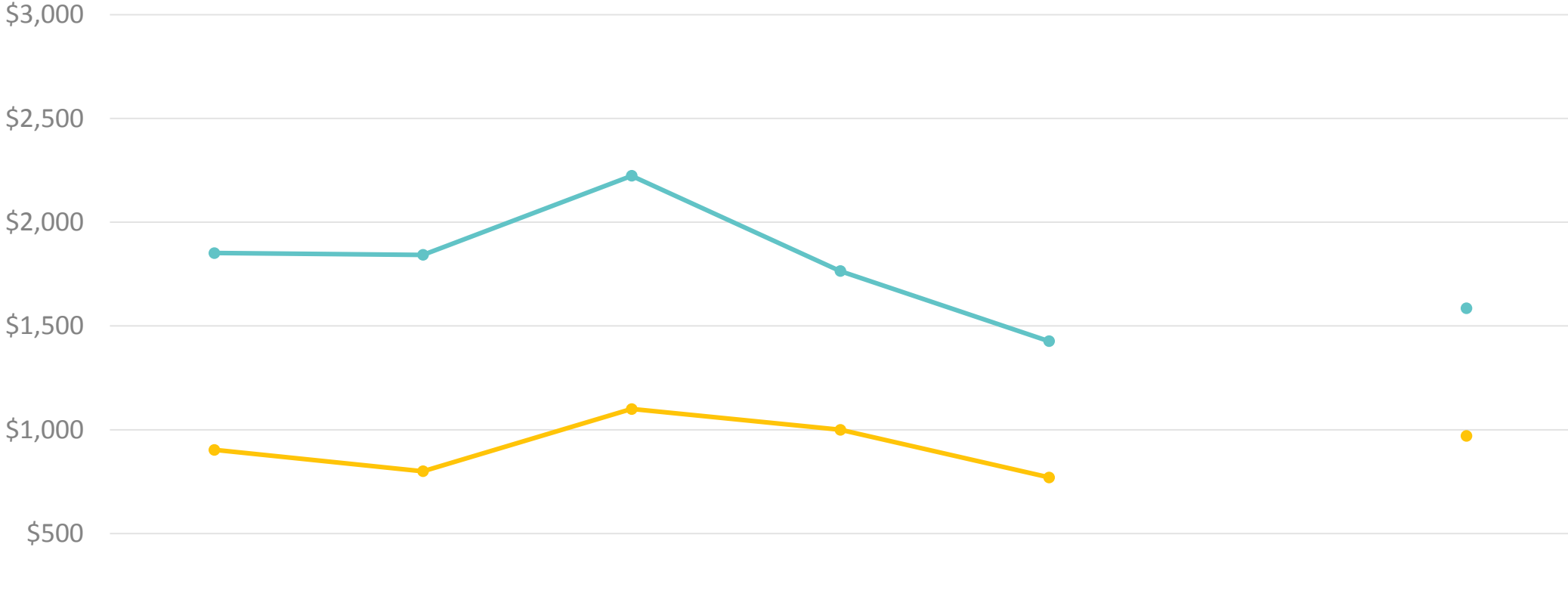


	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20		YTD
MEAN	\$1,504.05	\$1,584.21	\$1,557.65	\$1,502.03	\$1,567.90		\$1,537.44
MEDIAN	\$950.00	\$1,600.00	\$1,595.00	\$1,500.00	\$1,300.00		\$1,500.00

ONISLE EXPENDITURES

- \$1,426.51 = overall mean average expense (for entire travel party) by respondent
- \$1,108.38 = overall mean average **per person** expenditures

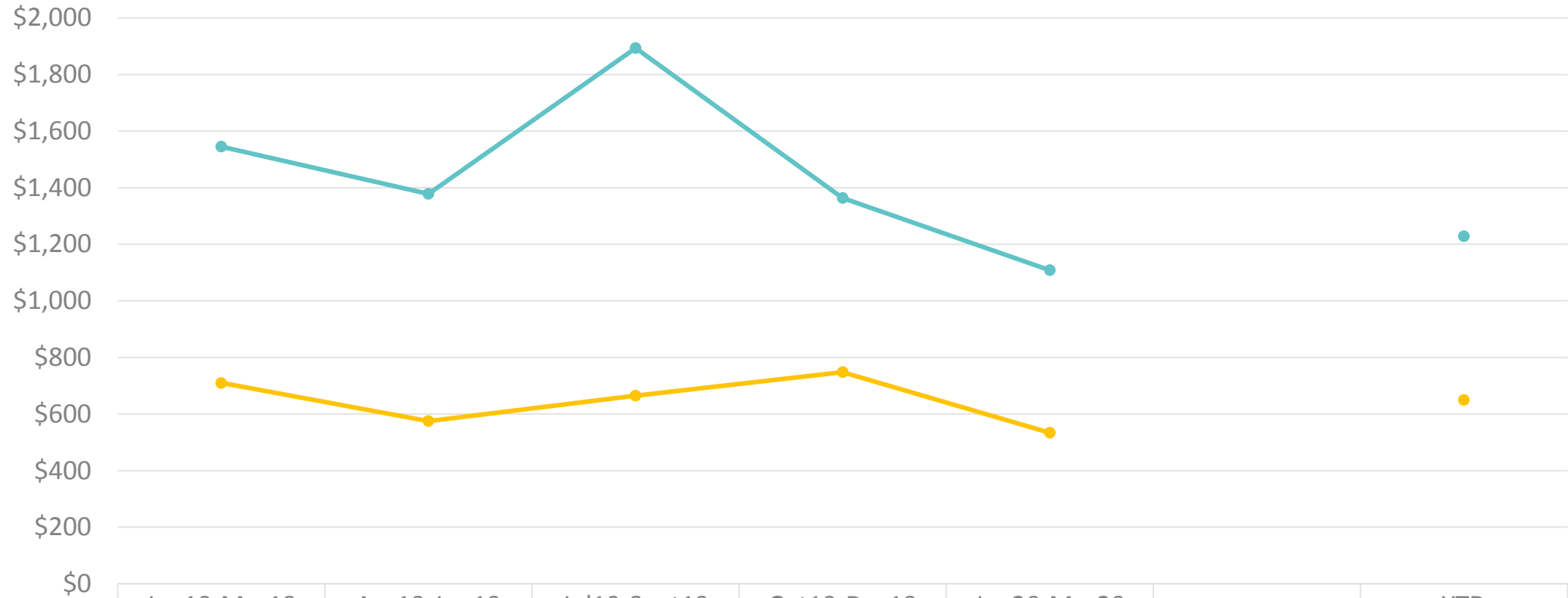
ONISLE – TRAVEL PARTY TRACKING



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20	YTD
MEAN	\$1,851.59	\$1,842.78	\$2,223.40	\$1,764.73	\$1,426.51	\$1,586.08
MEDIAN	\$903.00	\$800.00	\$1,100.00	\$1,000.00	\$770.00	\$970.00



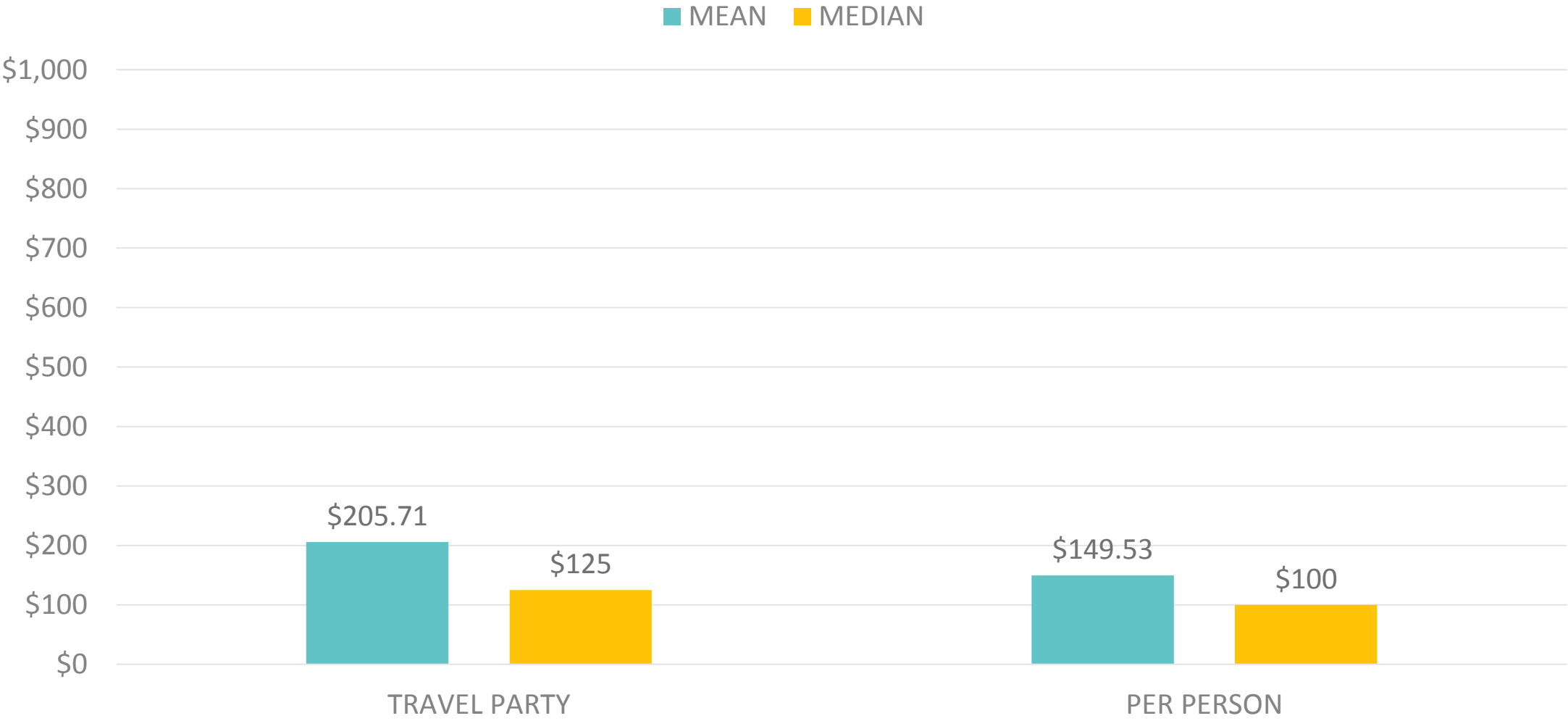
ONISLE – PER PERSON TRACKING



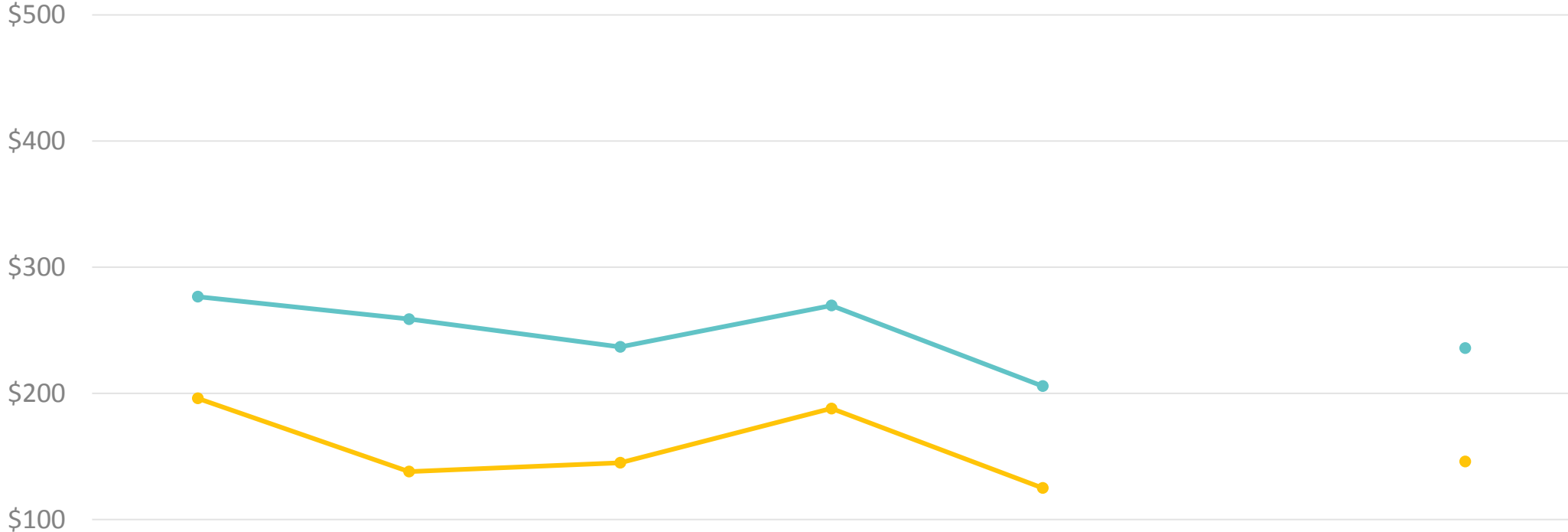
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20	YTD
MEAN	\$1,545.05	\$1,378.31	\$1,893.56	\$1,363.56	\$1,108.38	\$1,228.77
MEDIAN	\$710.00	\$575.00	\$665.00	\$748.00	\$534.00	\$650.00



ONISLE – PER DAY SPENDING



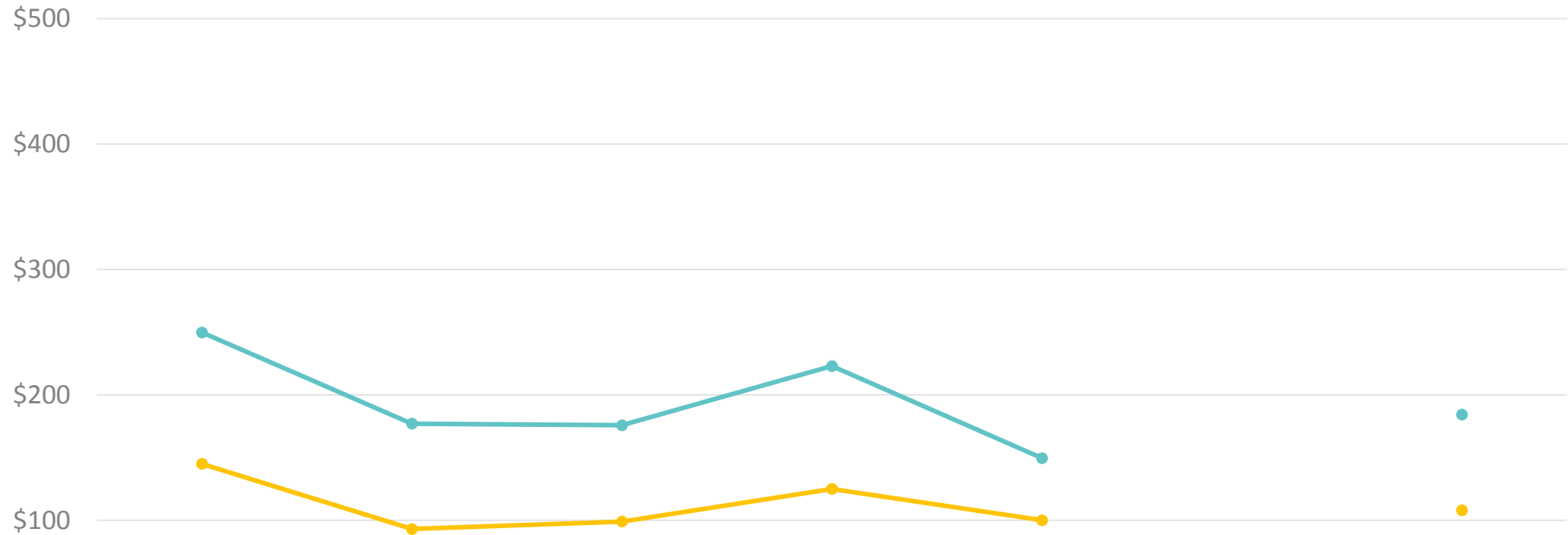
ONISLE – TRAVEL PARTY/ PER DAY TRACKING



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20	YTD
MEAN	\$276.61	\$258.88	\$236.80	\$269.65	\$205.71	\$235.88
MEDIAN	\$196.00	\$138.00	\$145.00	\$188.00	\$125.00	\$146.00



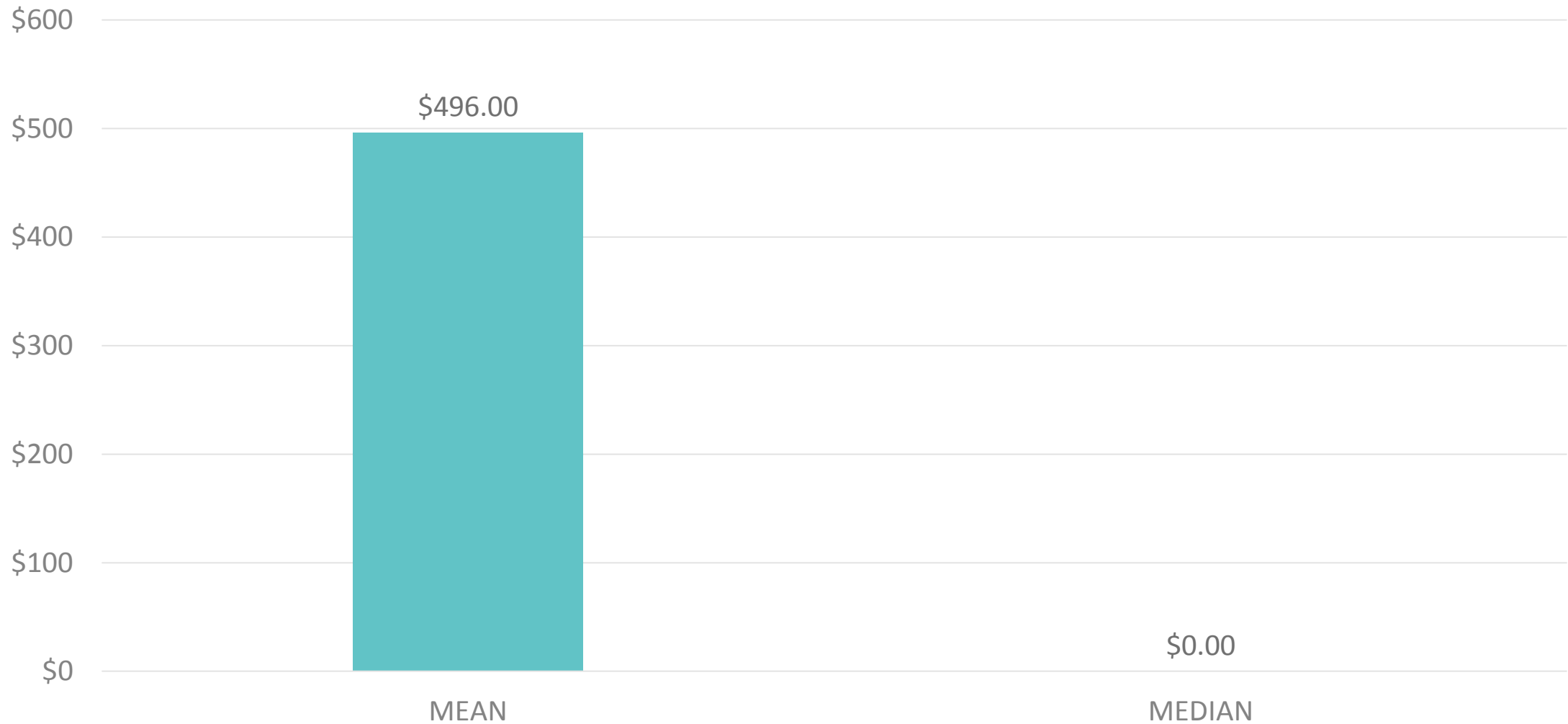
ONISLE – PER PERSON/ PER DAY TRACKING



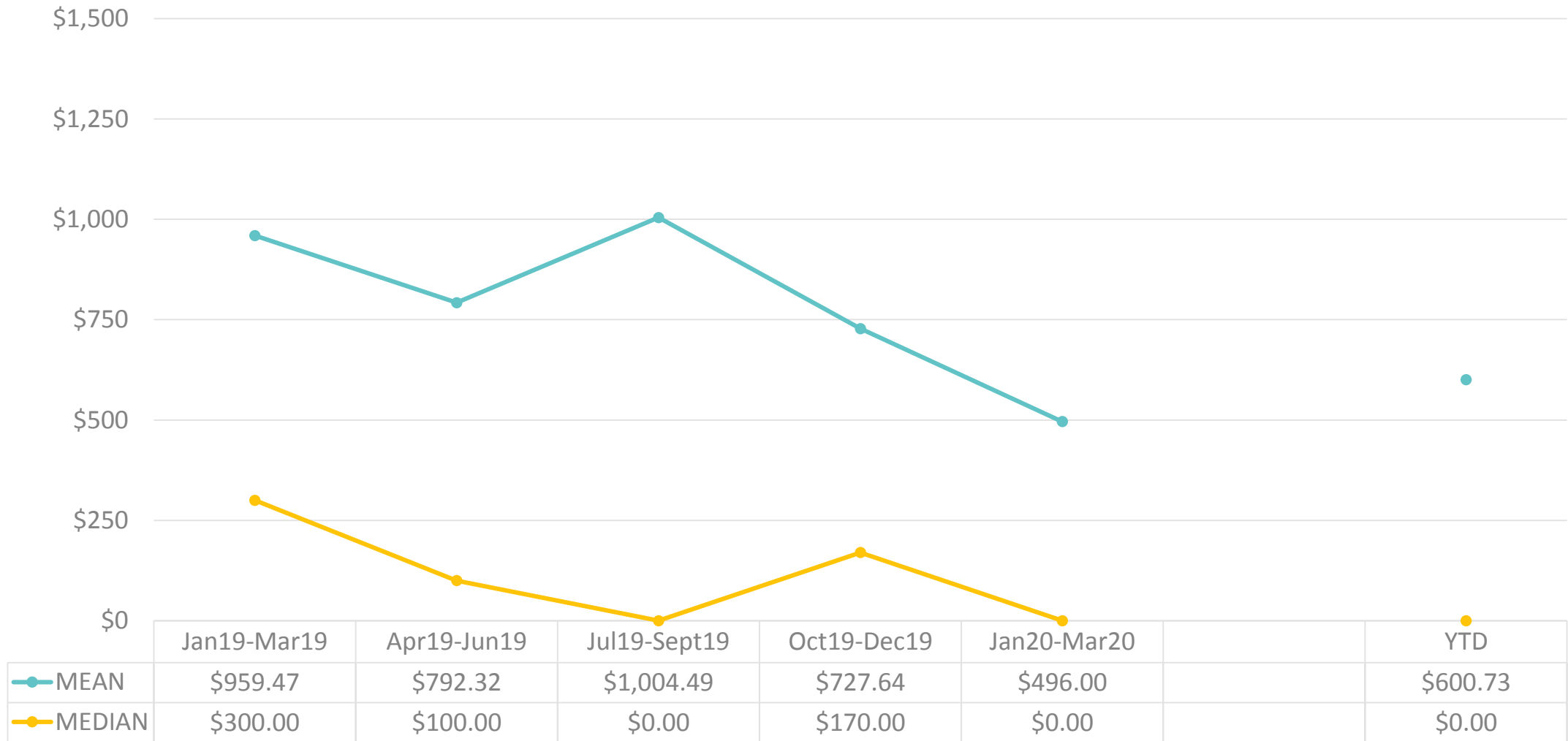
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20	YTD
MEAN	\$249.75	\$177.06	\$175.80	\$222.97	\$149.53	\$184.18
MEDIAN	\$145.00	\$93.00	\$99.00	\$125.00	\$100.00	\$108.00



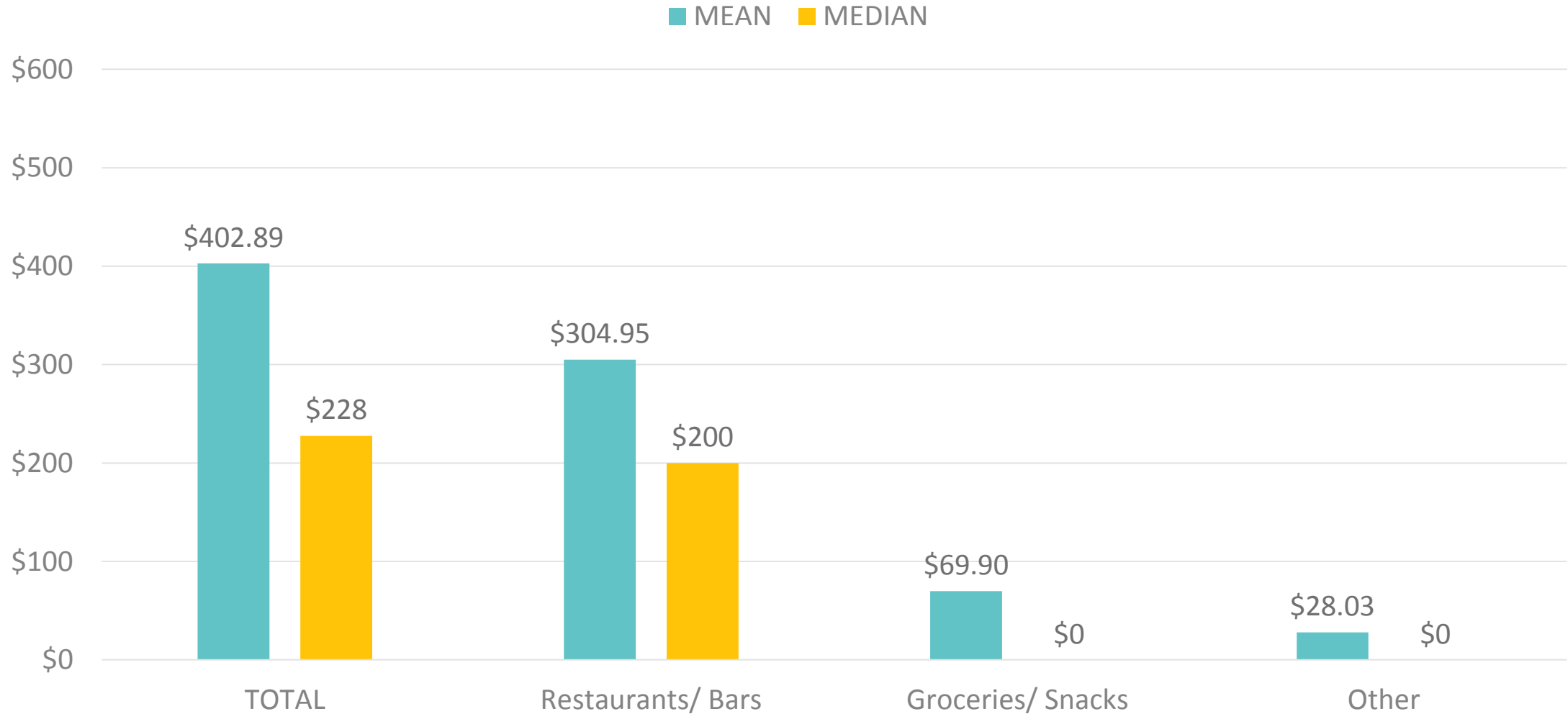
ONISLE – ACCOMMODATIONS



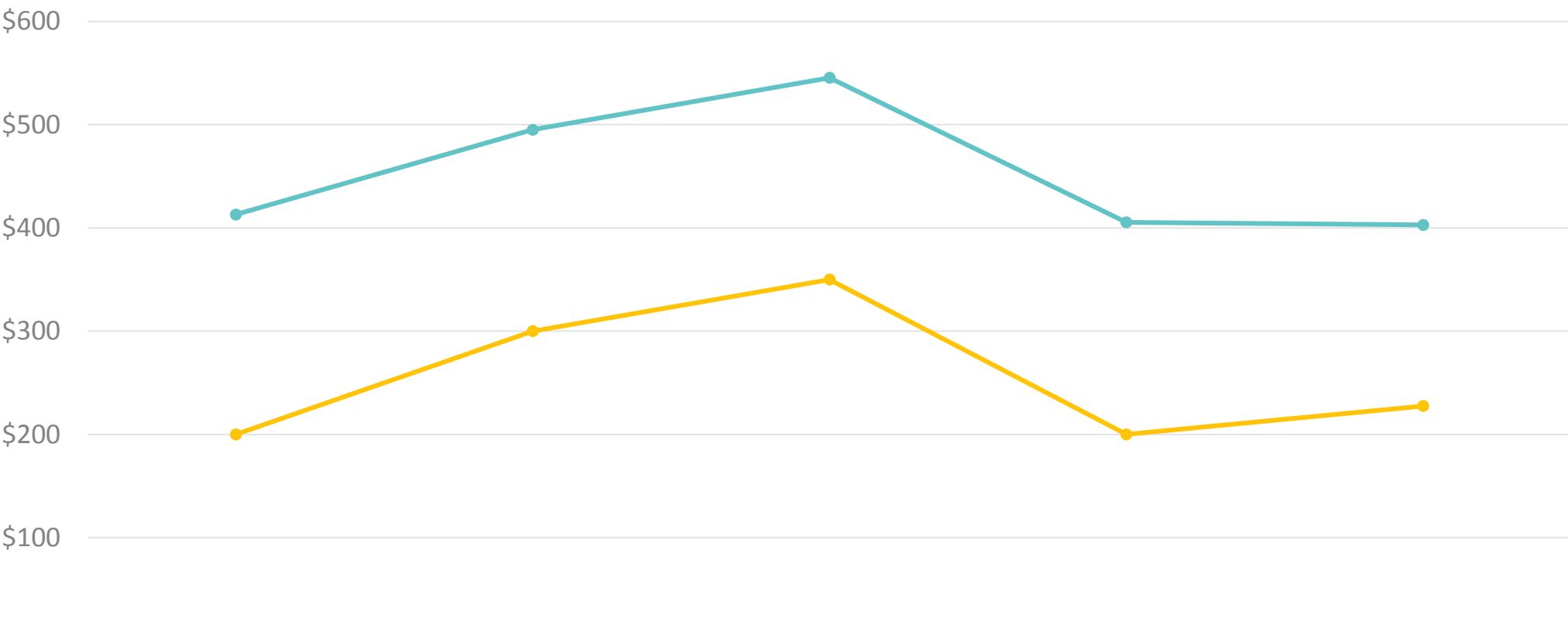
ONISLE – ACCOMMODATIONS TRACKING



ONISLE – FOOD & BEVERAGE



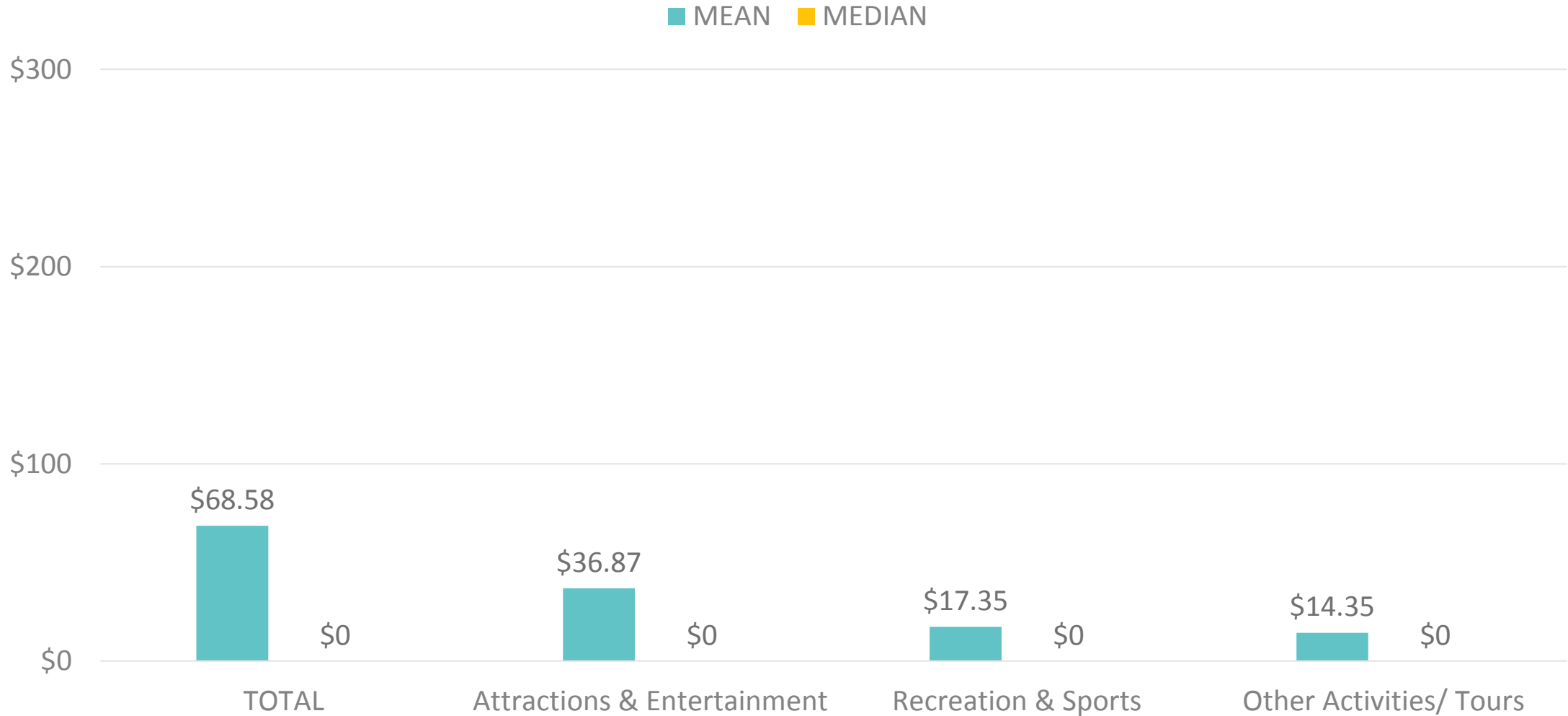
ONISLE – TOTAL FOOD & BEVERAGE TRACKING



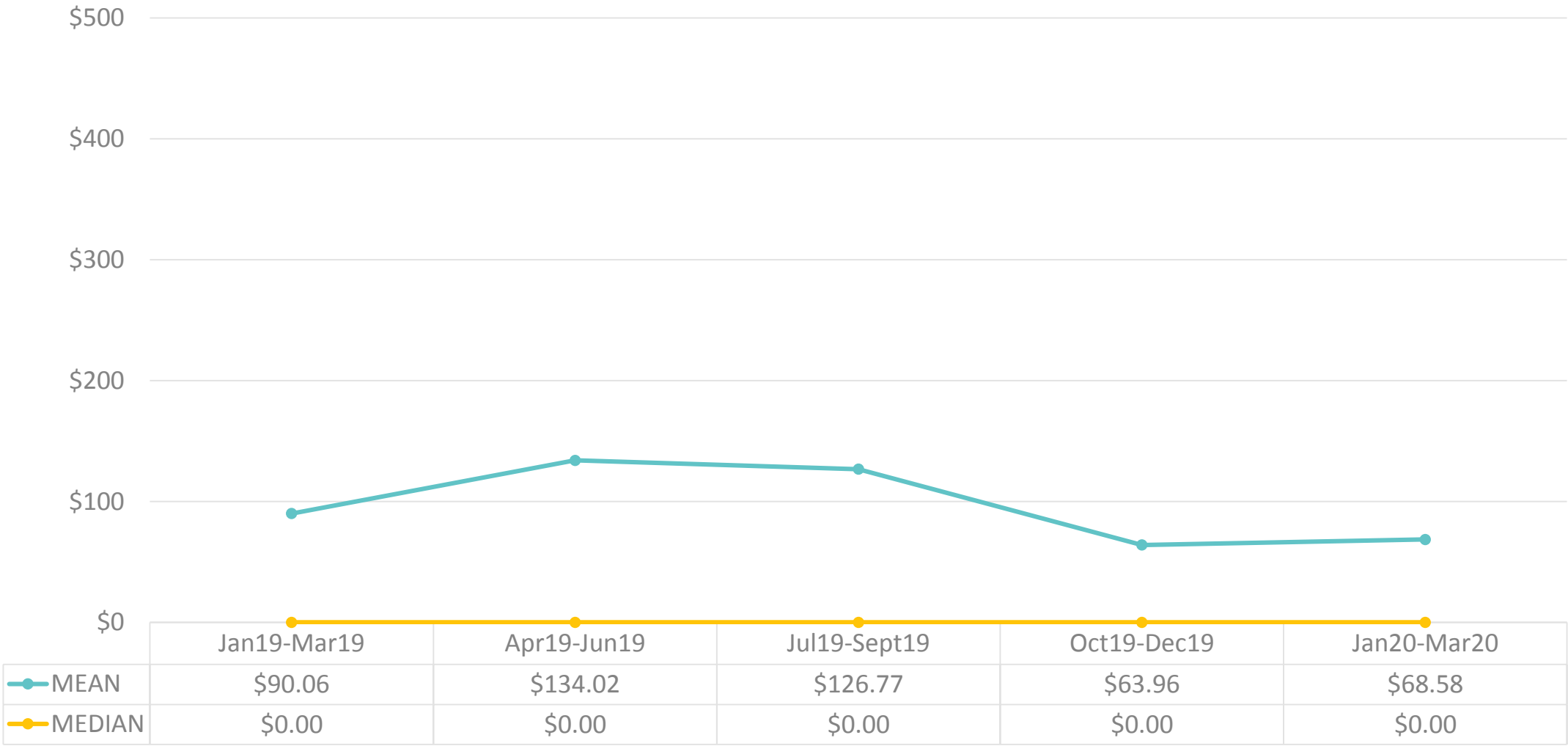
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20
MEAN	\$412.97	\$495.17	\$545.40	\$405.45	\$402.89
MEDIAN	\$200.00	\$300.00	\$350.00	\$200.00	\$227.50



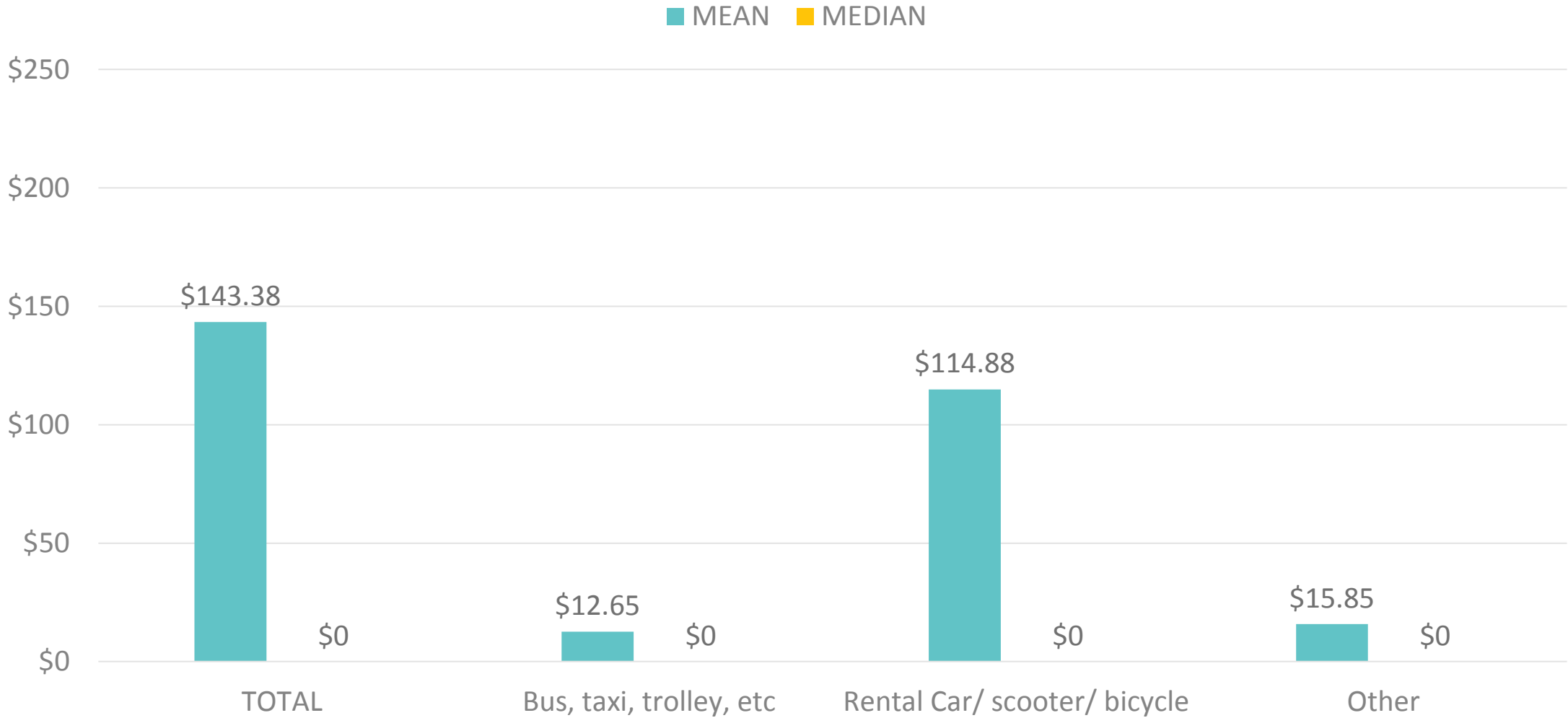
ONISLE – ENTERTAINMENT & RECREATION



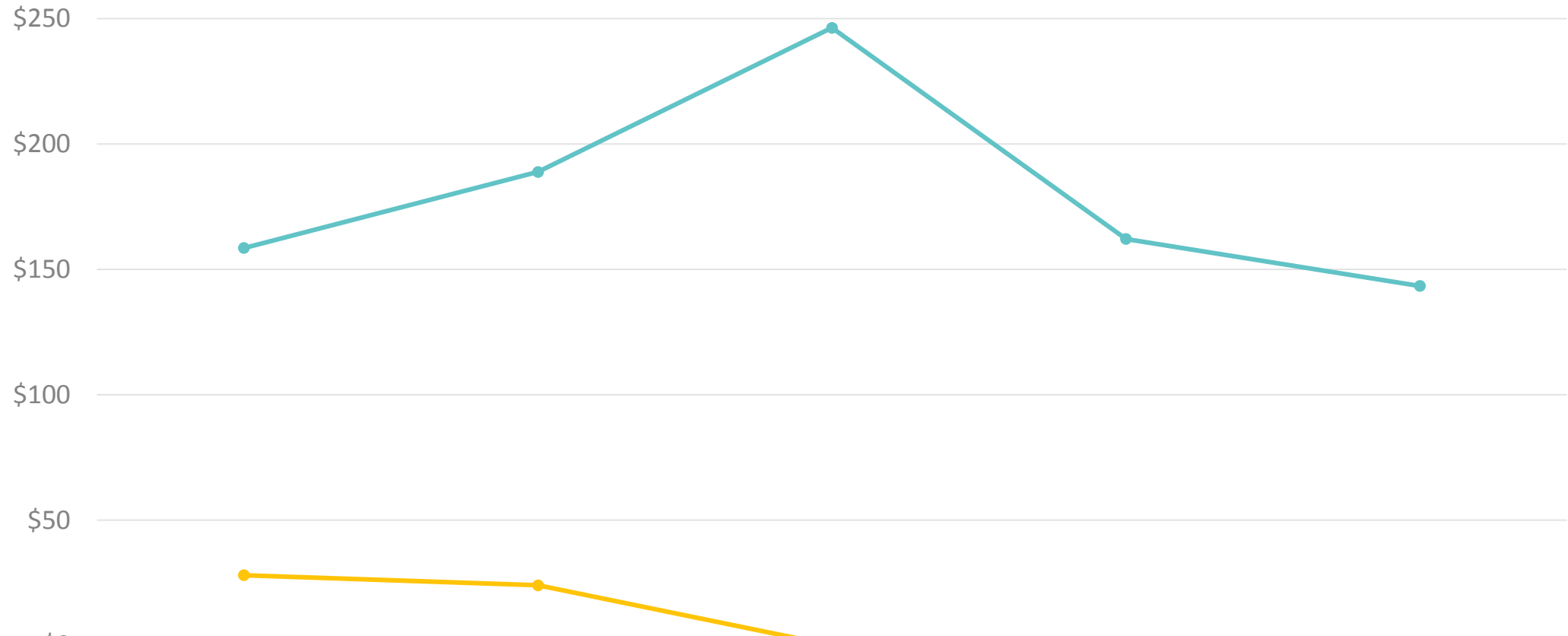
ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING



ONISLE – TRANSPORTATION

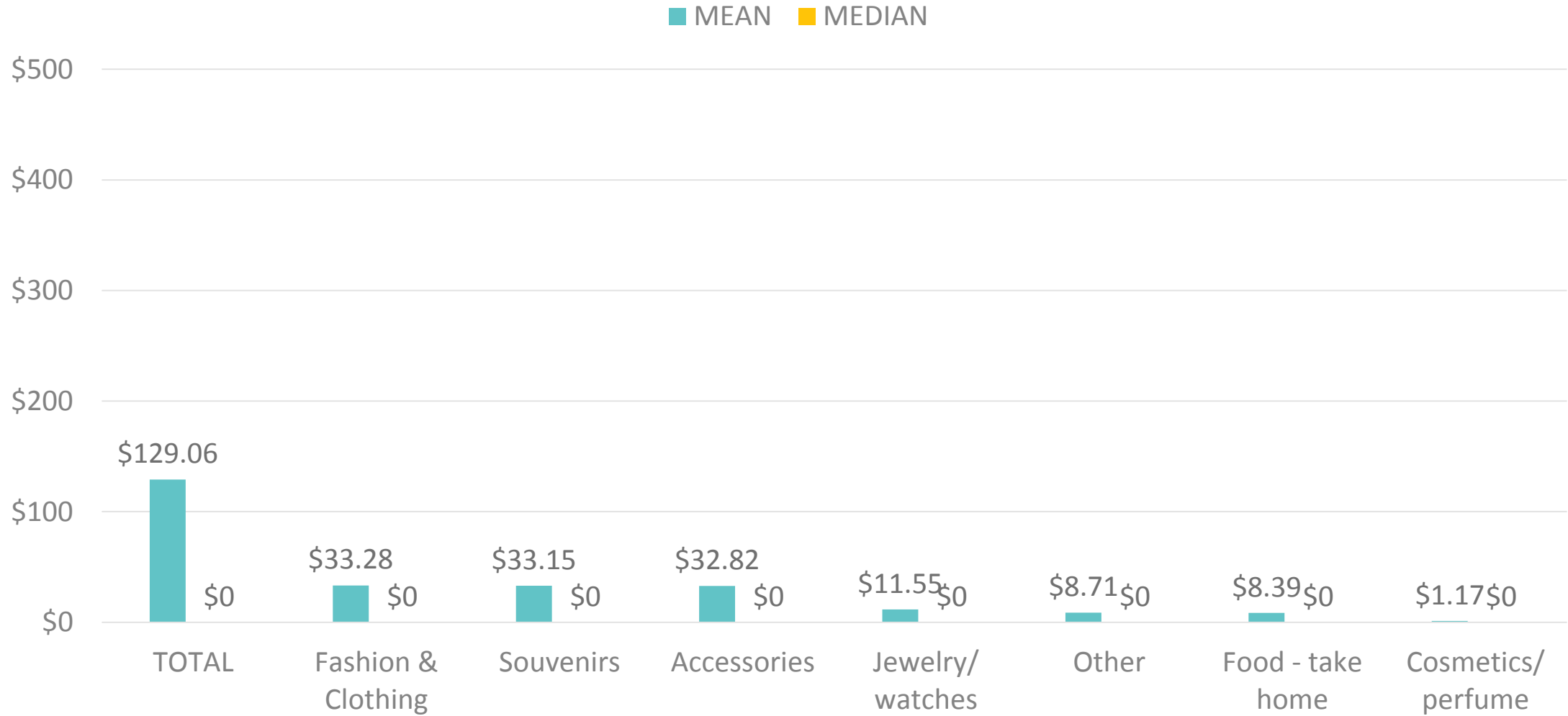


ONISLE – TOTAL TRANSPORTATION TRACKING

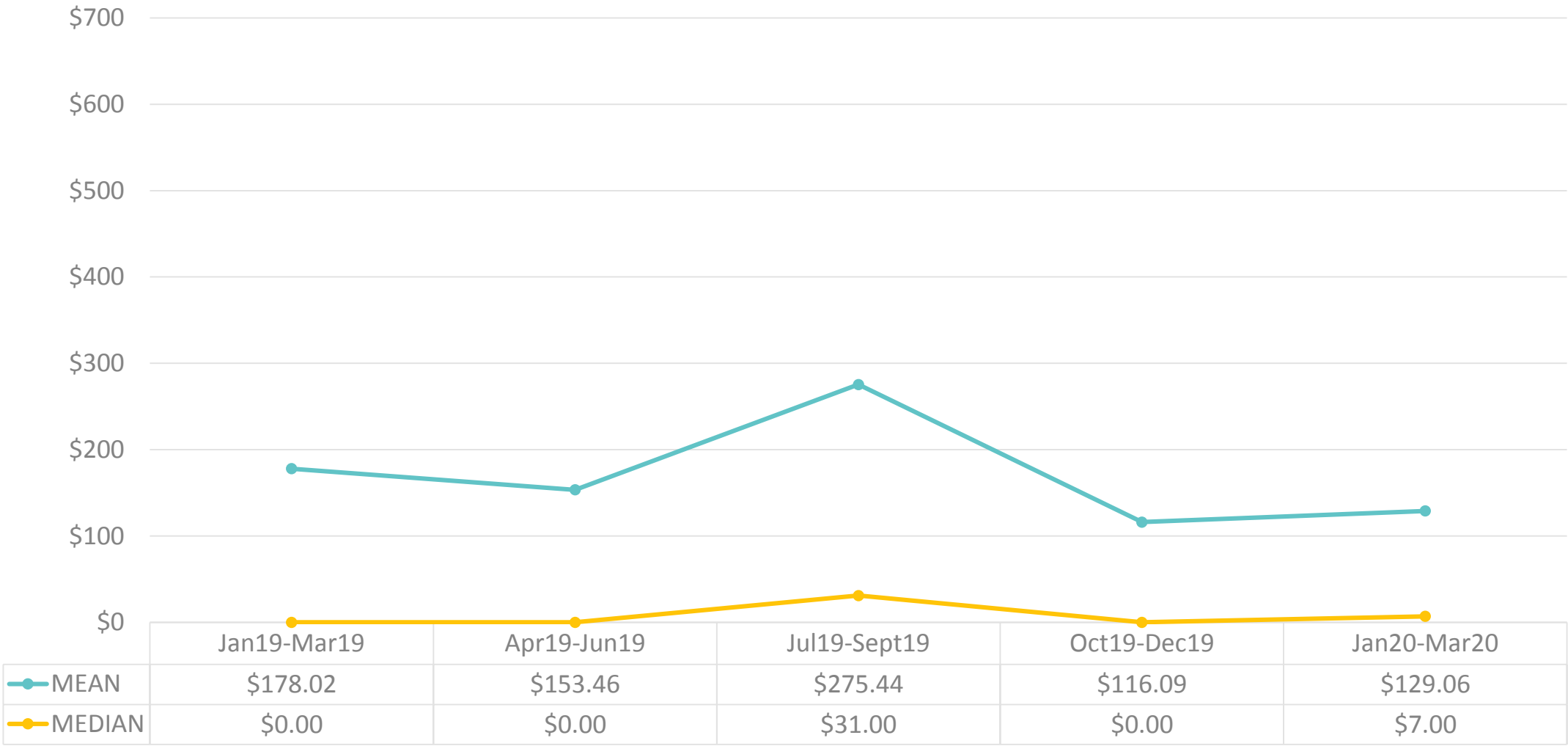


	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20
MEAN	\$158.53	\$188.83	\$246.33	\$162.10	\$143.38
MEDIAN	\$28.00	\$24.00	\$0.00	\$0.00	\$0.00

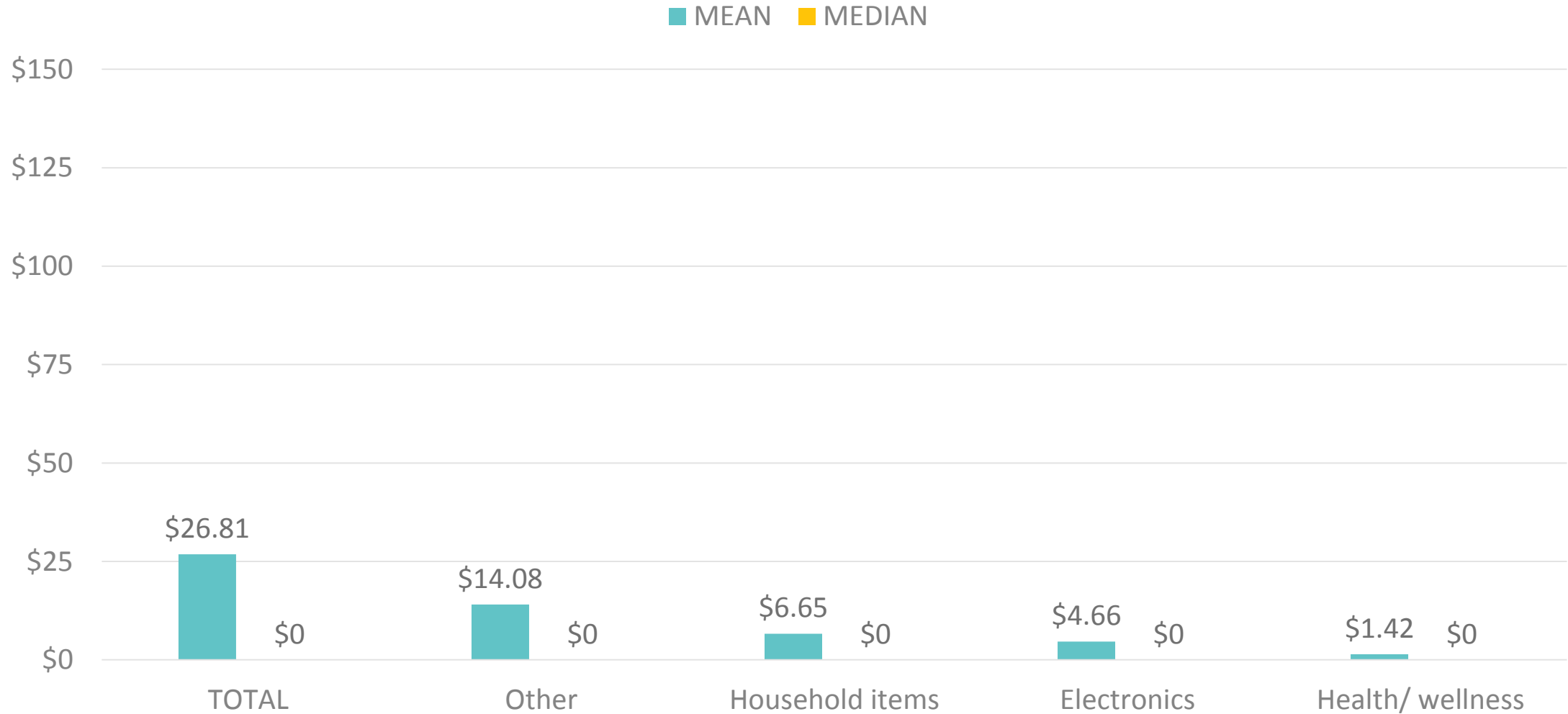
ONISLE – SHOPPING



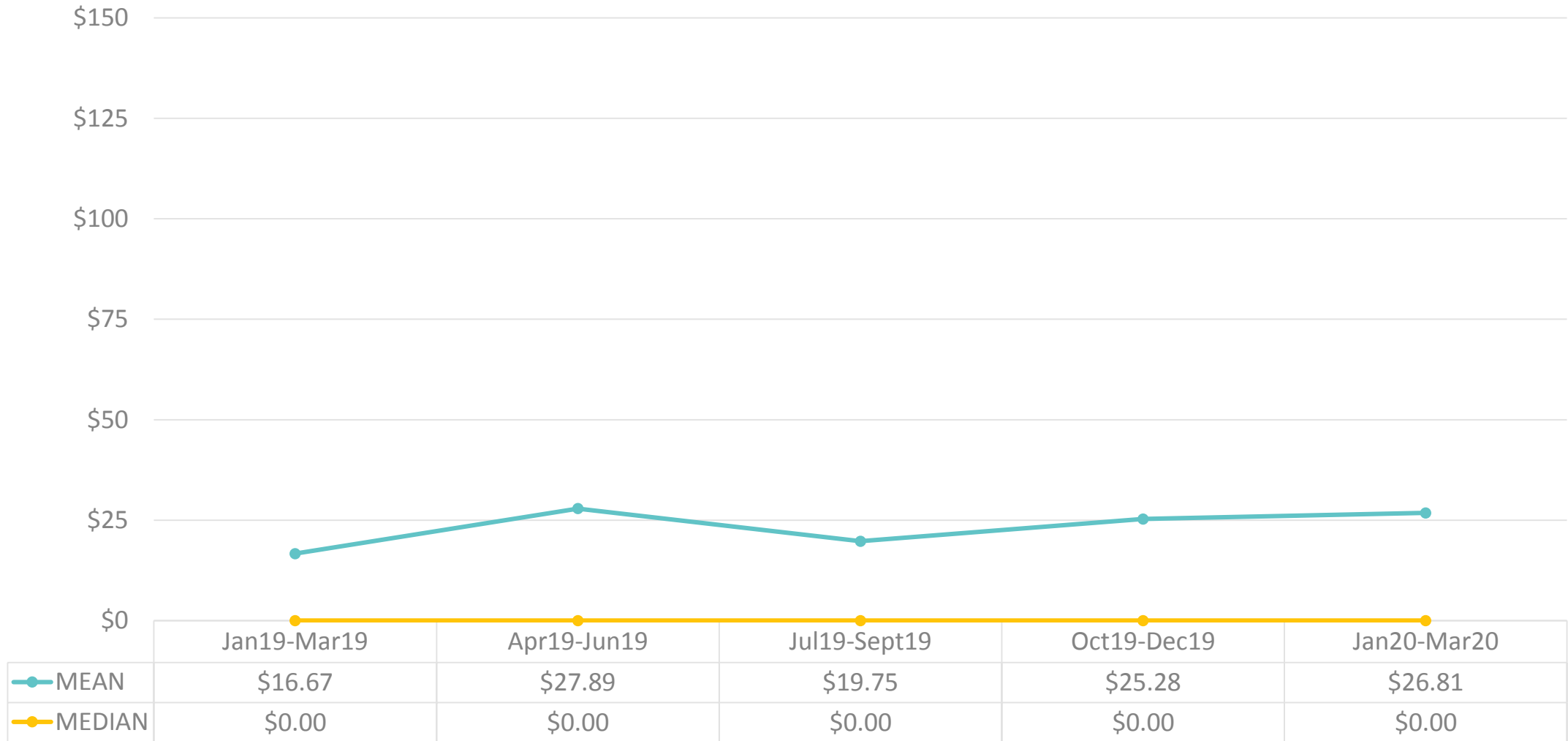
ONISLE – TOTAL SHOPPING TRACKING



ONISLE – MISCELLANEOUS



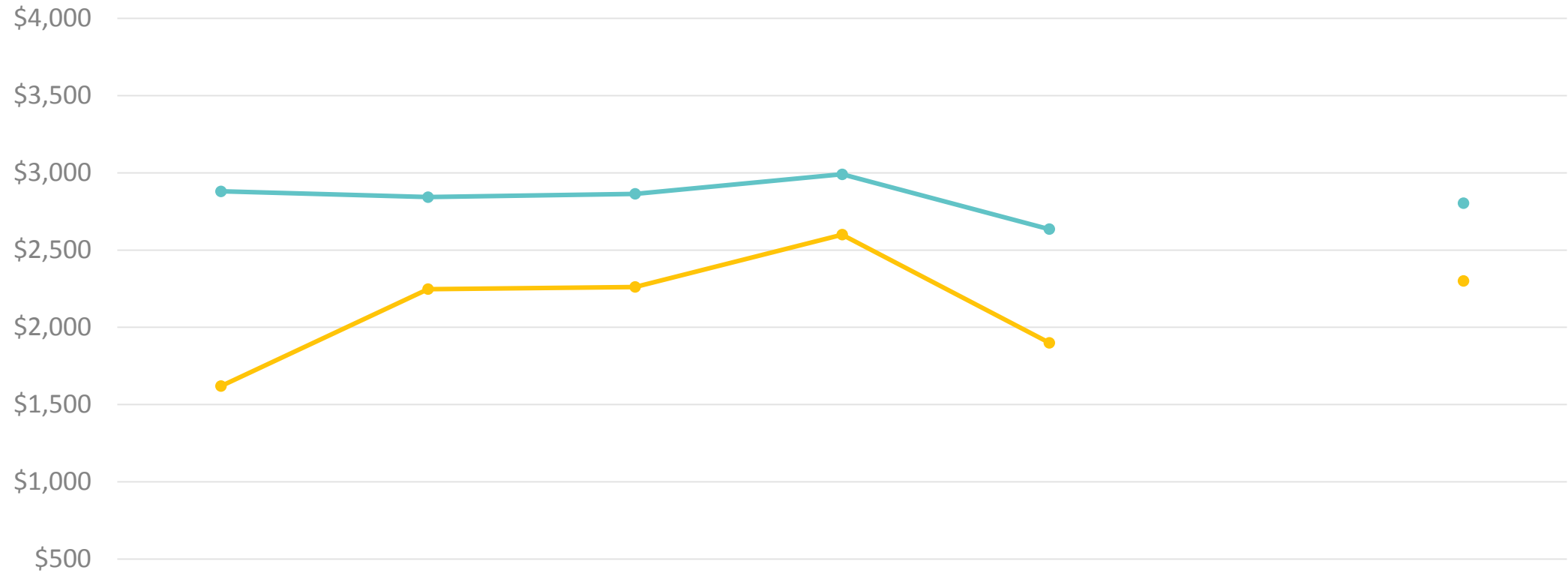
ONISLE – MISCELLANEOUS TRACKING



TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

- \$2,635.85 = Mean average per person
- \$1,900.00 = Median amount spent per person

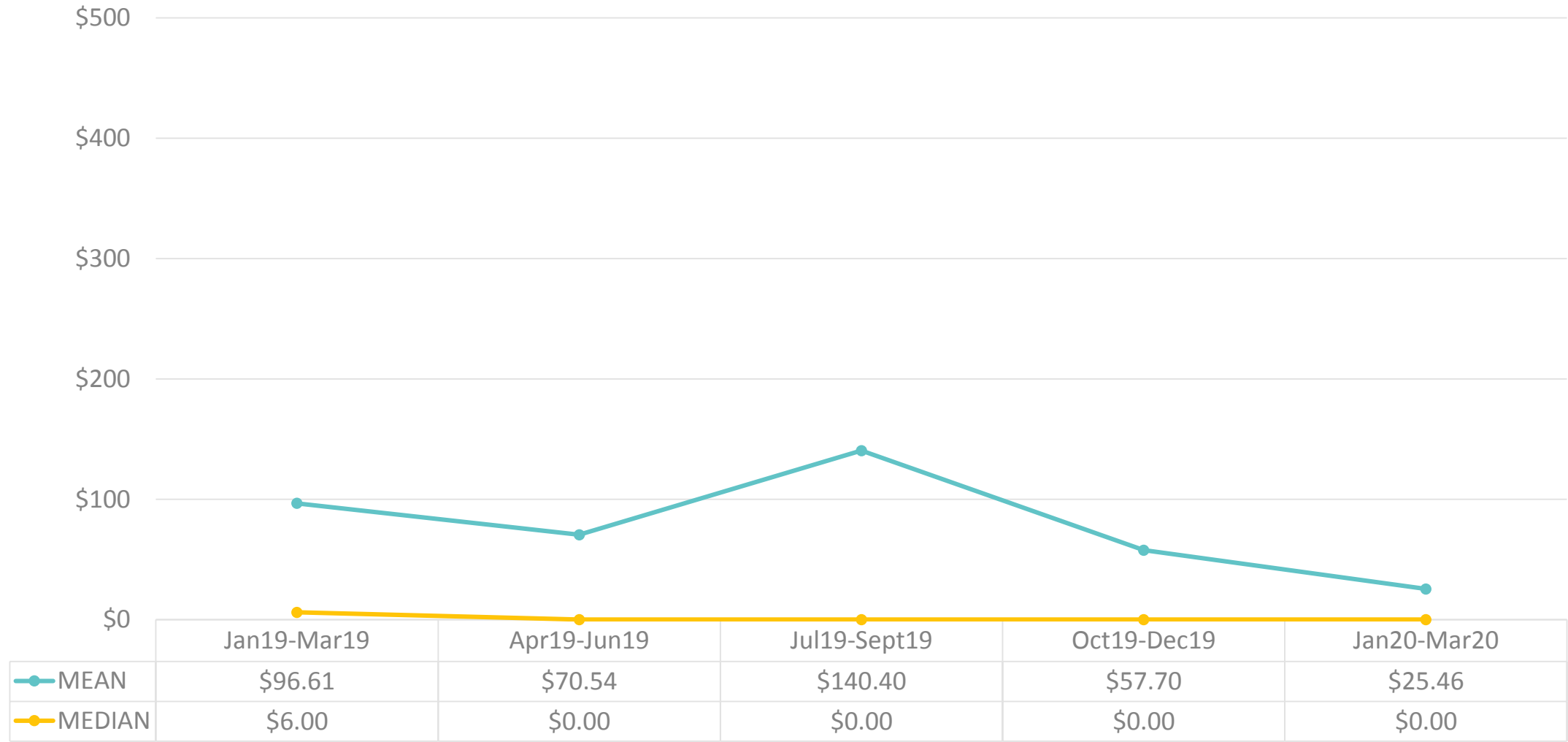
TOTAL EXPENDITURES PER PERSON TRACKING



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20	YTD
MEAN	\$2,880.46	\$2,843.20	\$2,863.78	\$2,990.60	\$2,635.85	\$2,803.65
MEDIAN	\$1,620.00	\$2,247.00	\$2,261.00	\$2,600.00	\$1,900.00	\$2,300.00



GUAM AIRPORT EXPENDITURE TRACKING



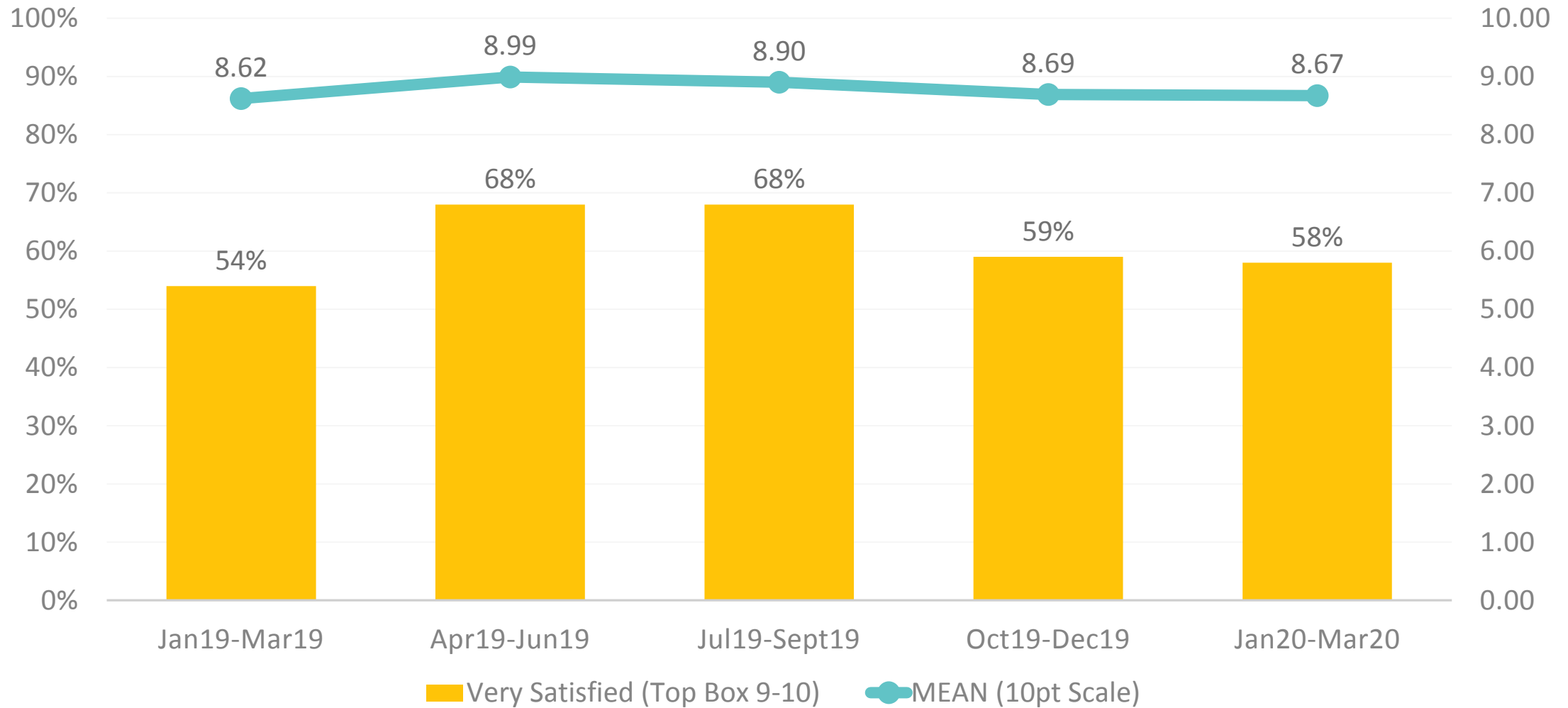


SECTION 4

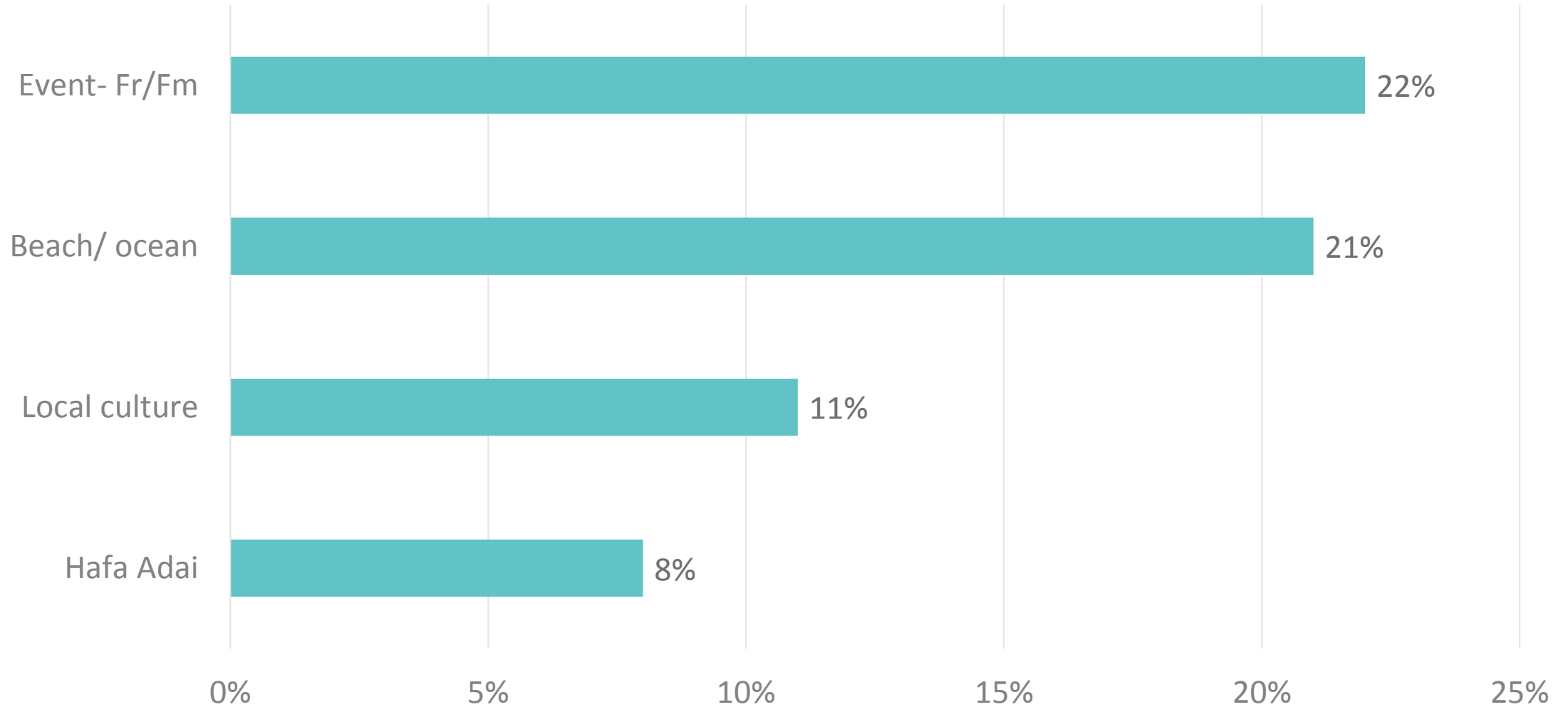
VISITOR SATISFACTION



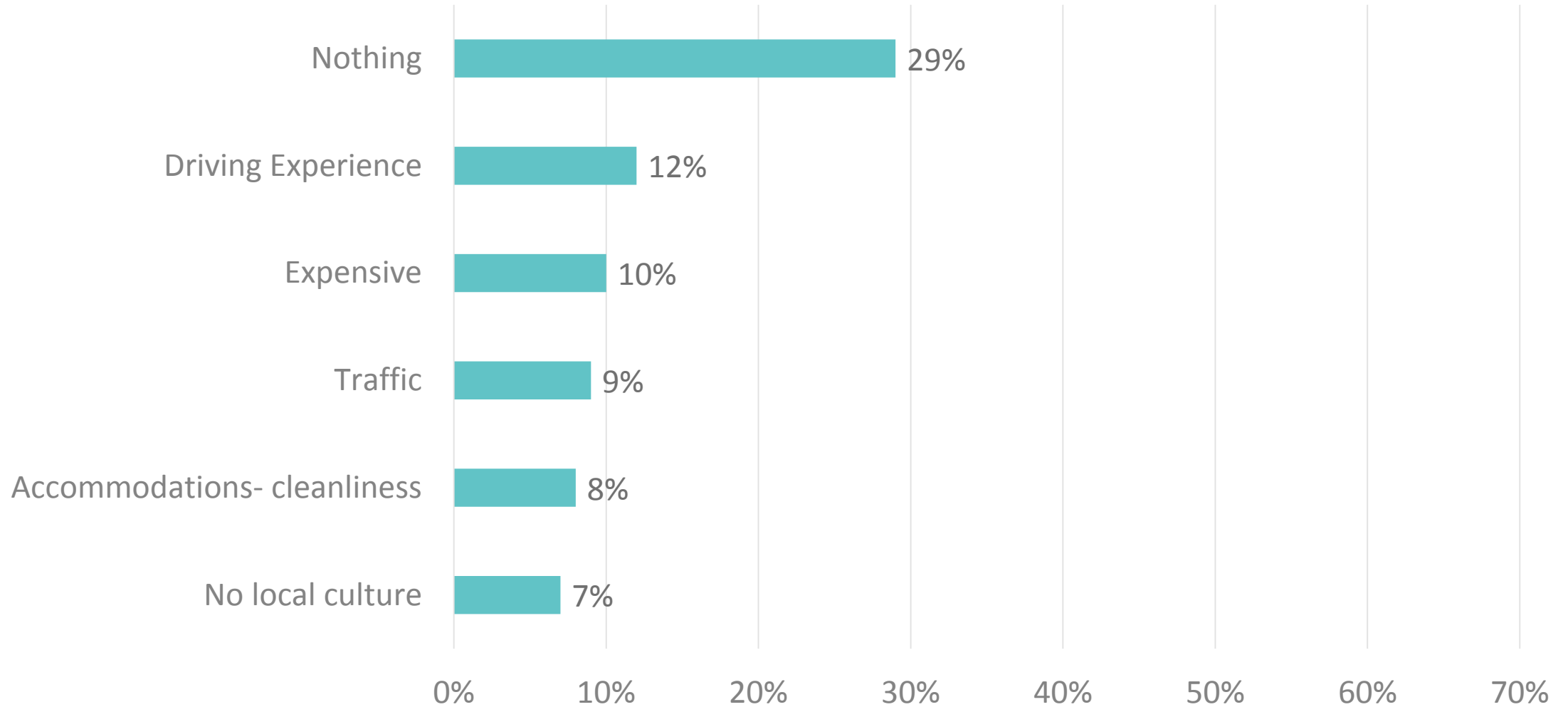
OVERALL SATISFACTION – 10PT SCALE



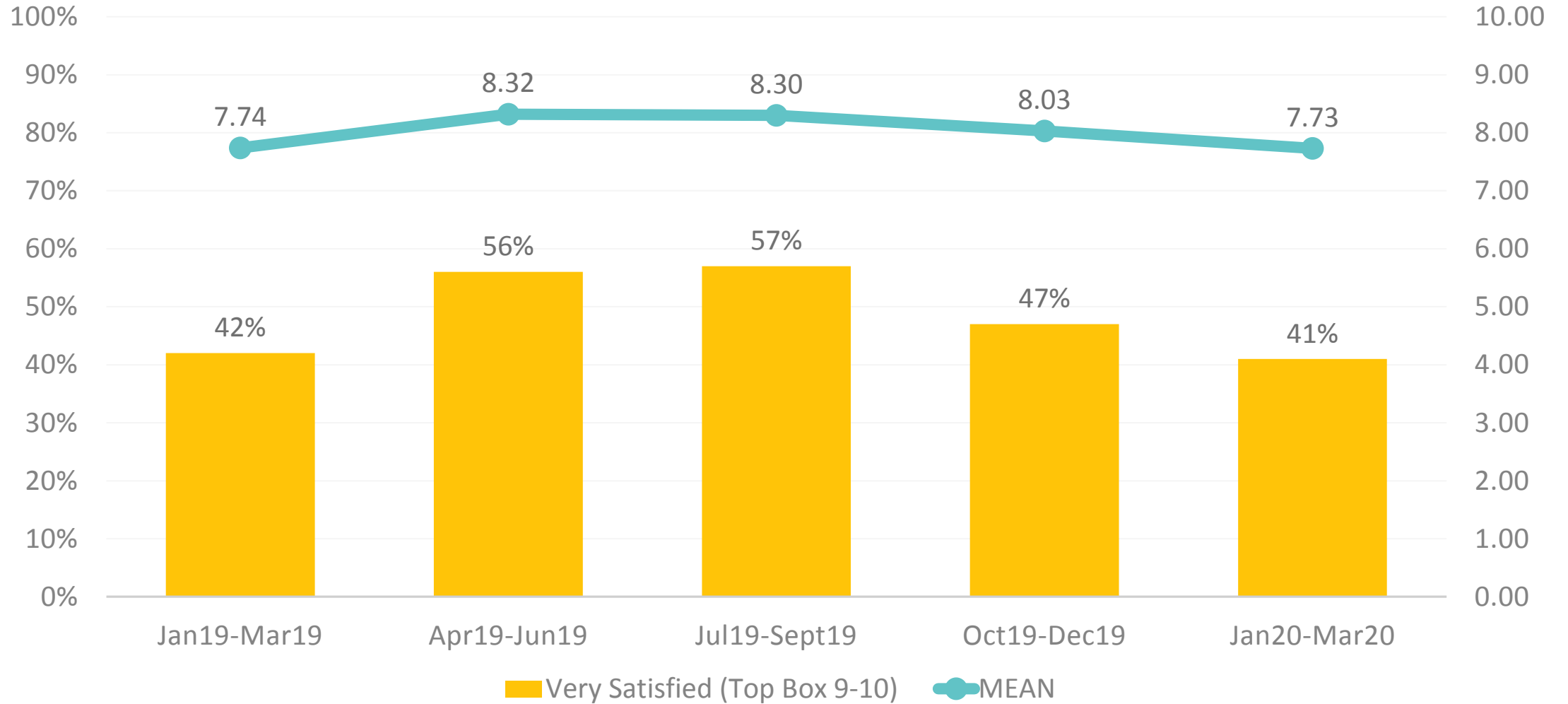
SWOT – POSITIVE ASPECT OF TRIP



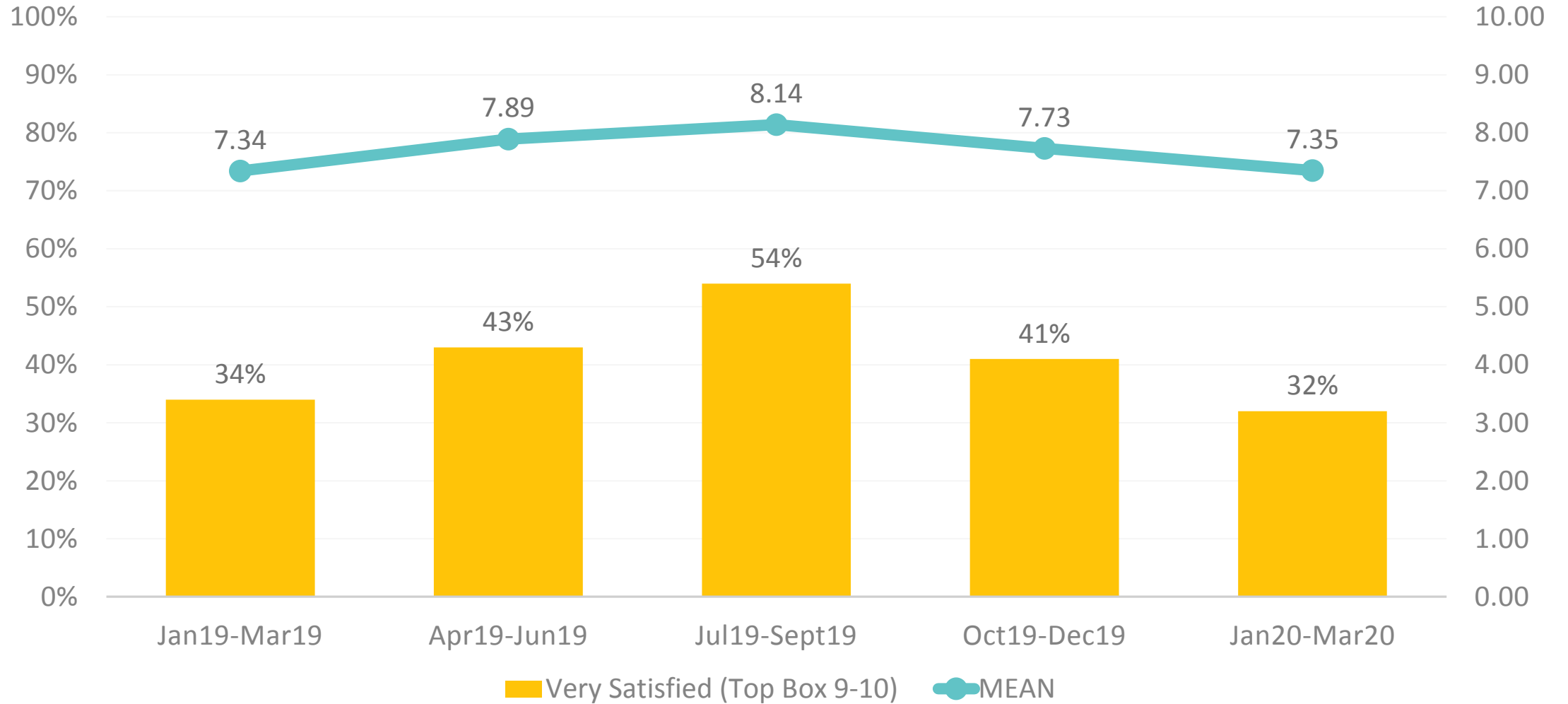
SWOT – NEGATIVE ASPECT OF TRIP



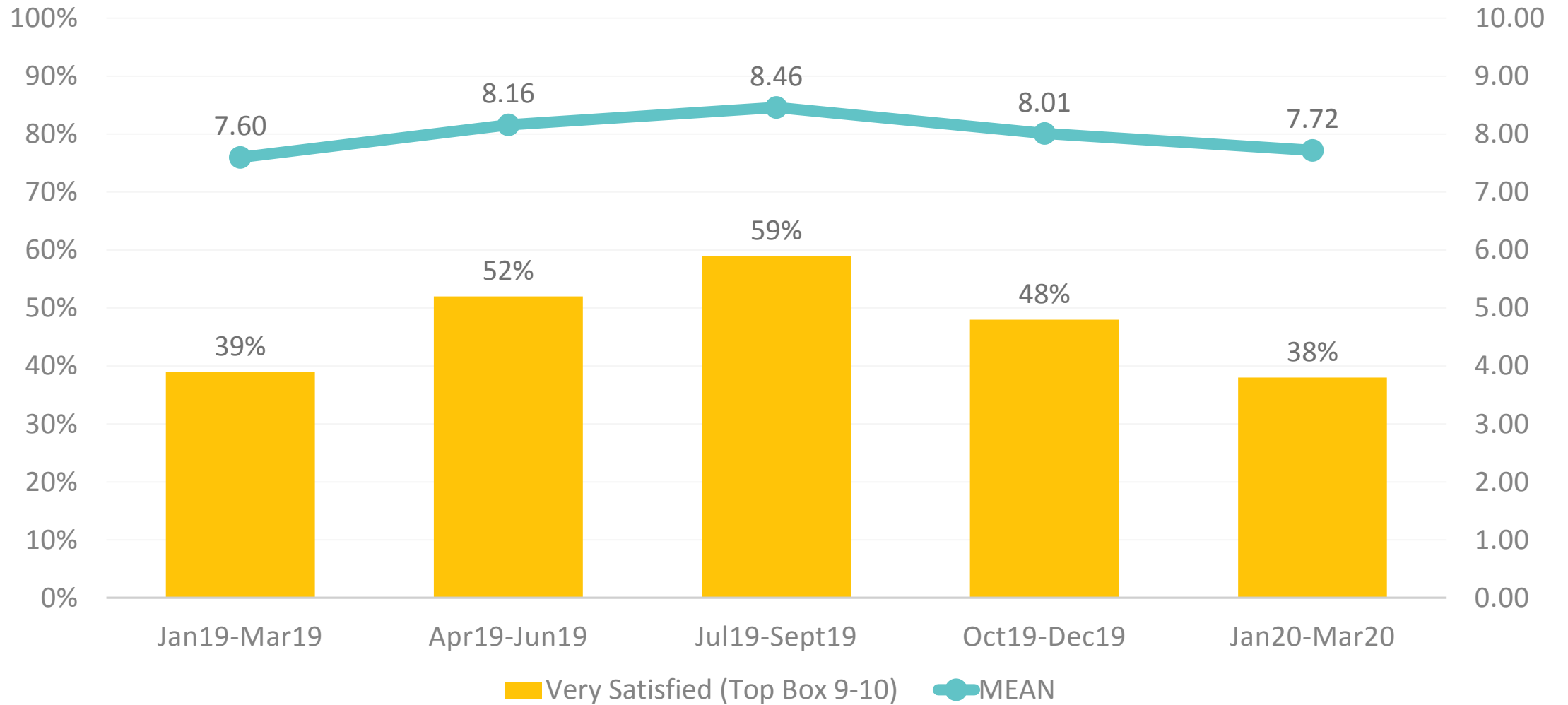
SATISFACTION – ENTERTAINMENT



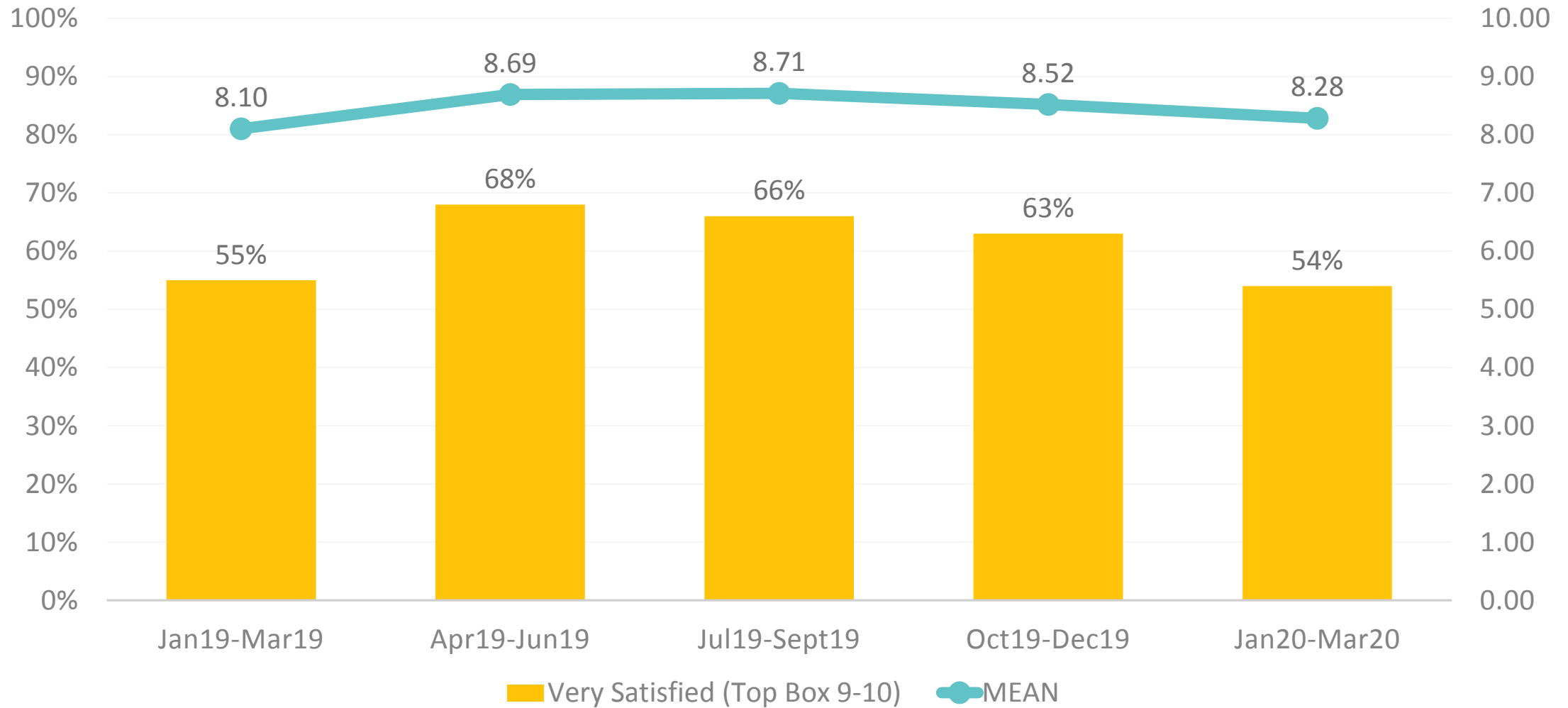
SATISFACTION – SHOPPING



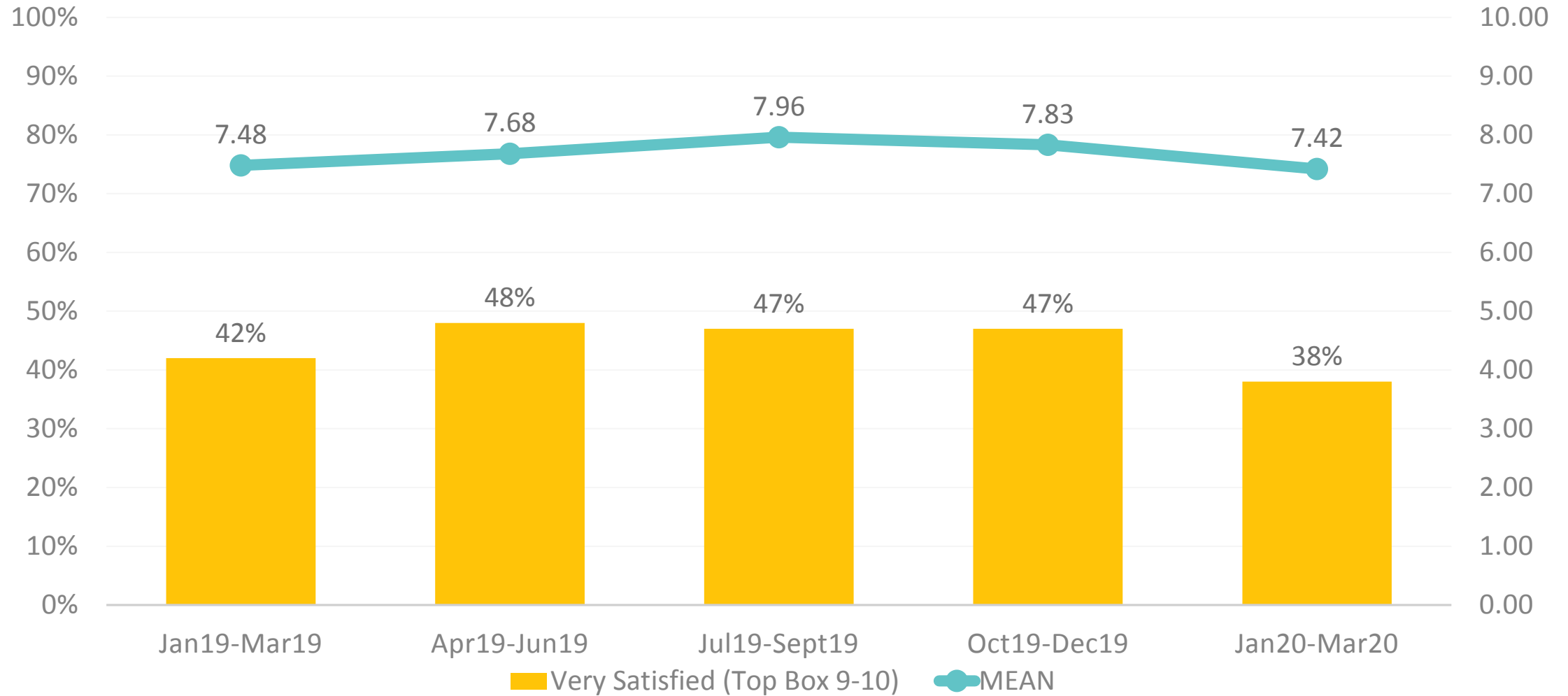
SATISFACTION – DINING



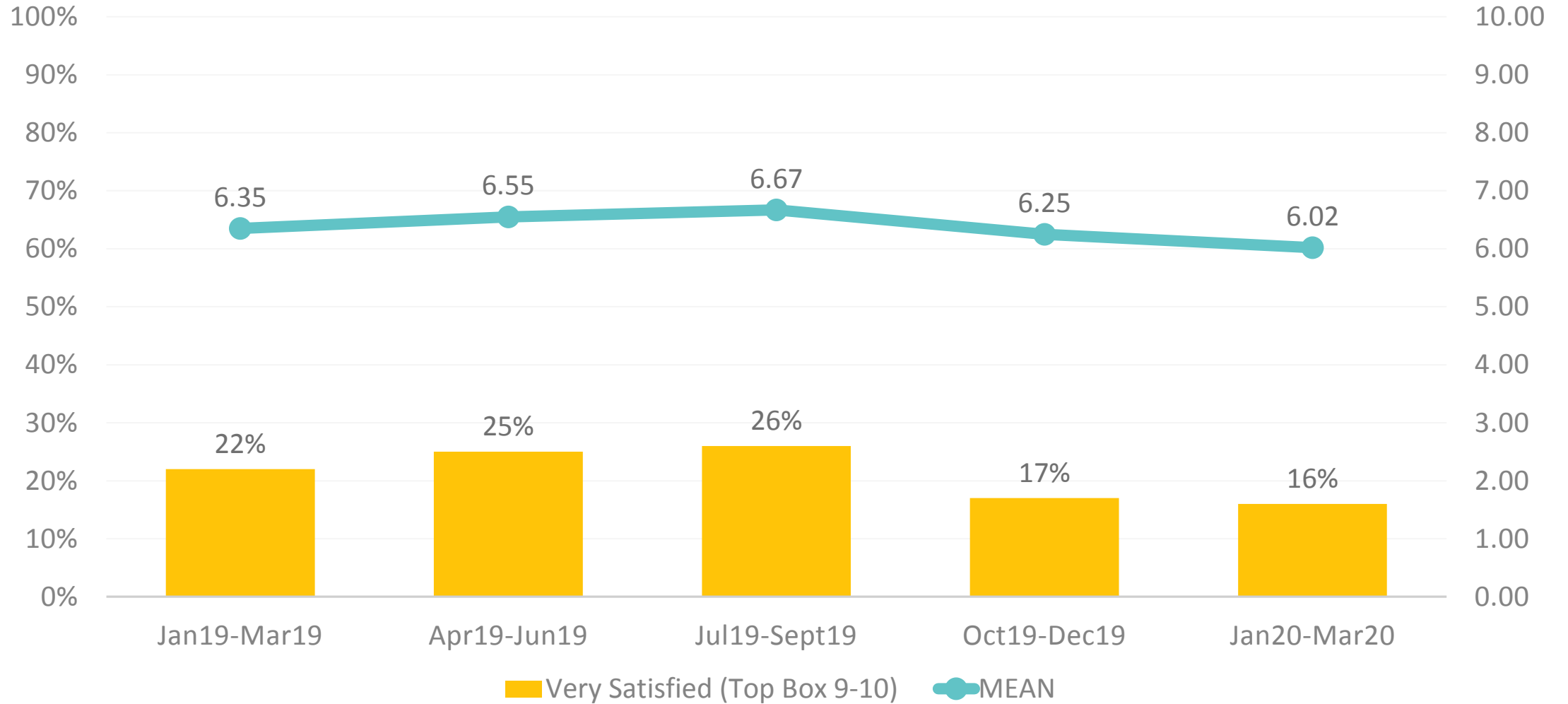
SATISFACTION – BEACHES



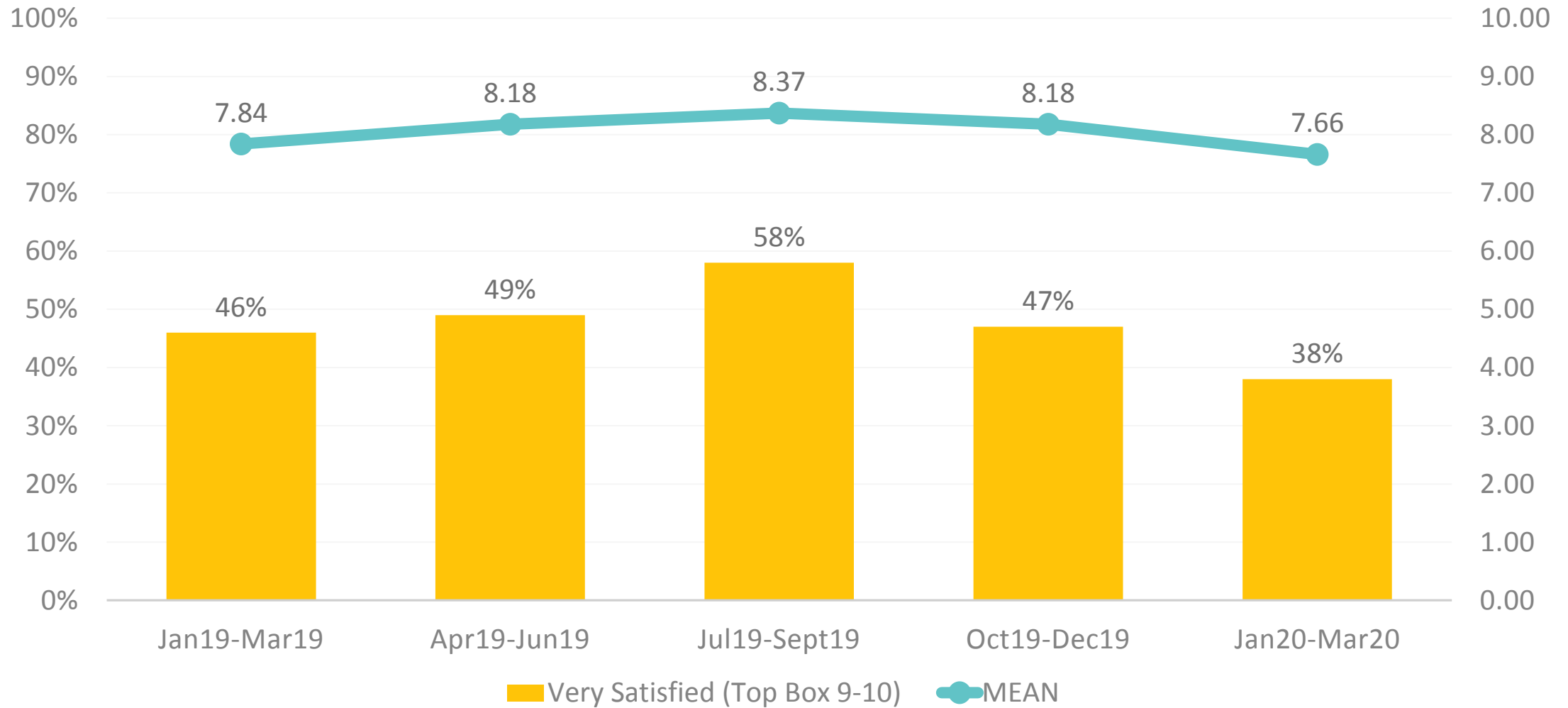
SATISFACTION – PARKS



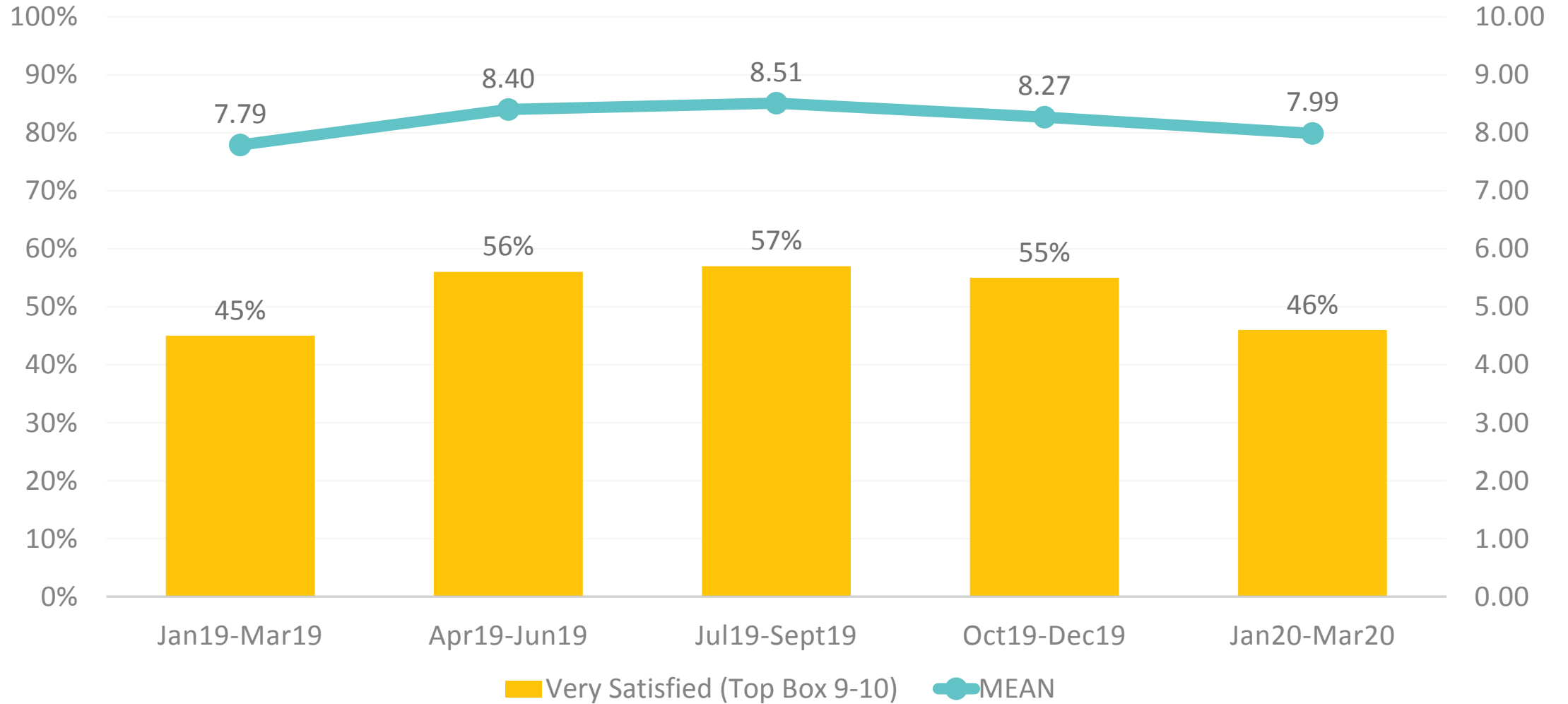
SATISFACTION – ROADS



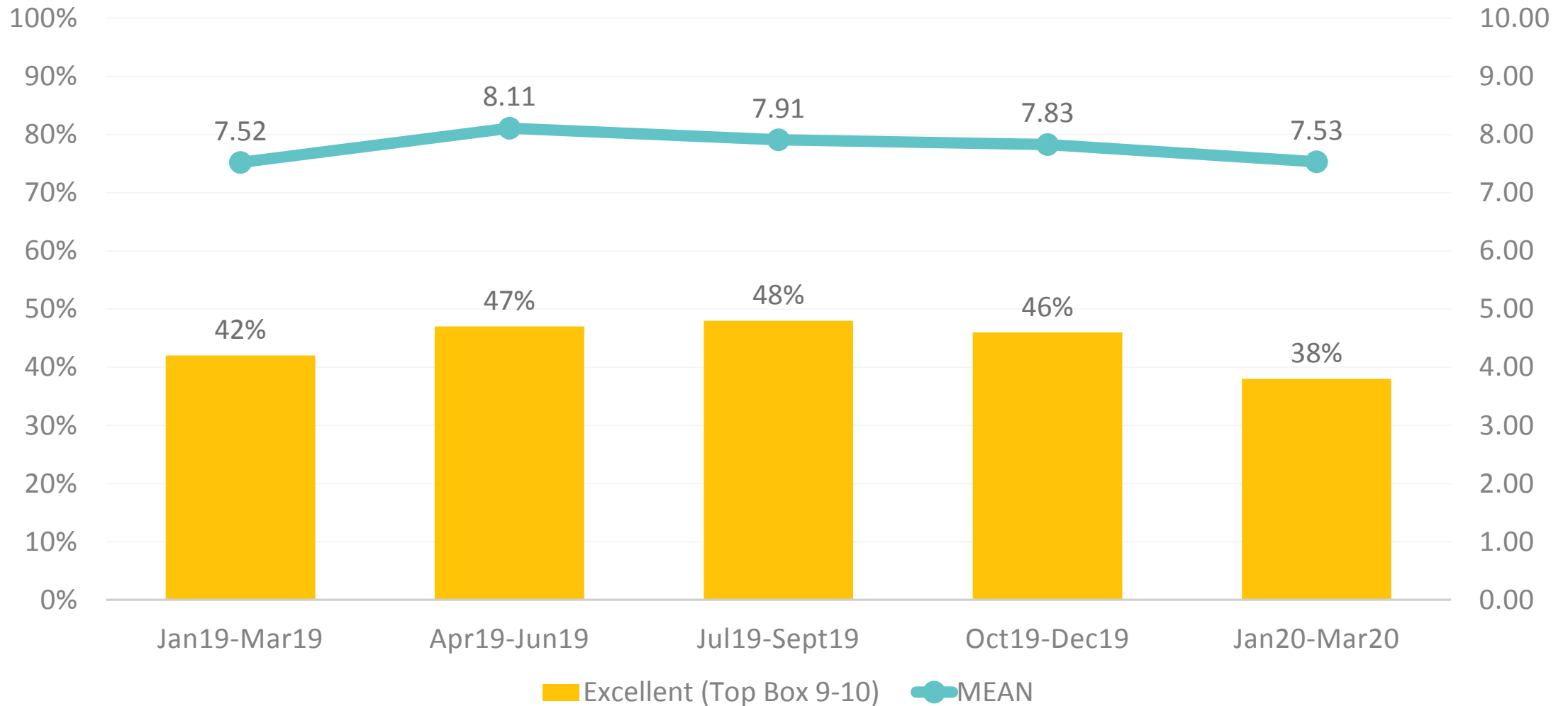
SATISFACTION – SIGHTSEEING AREAS



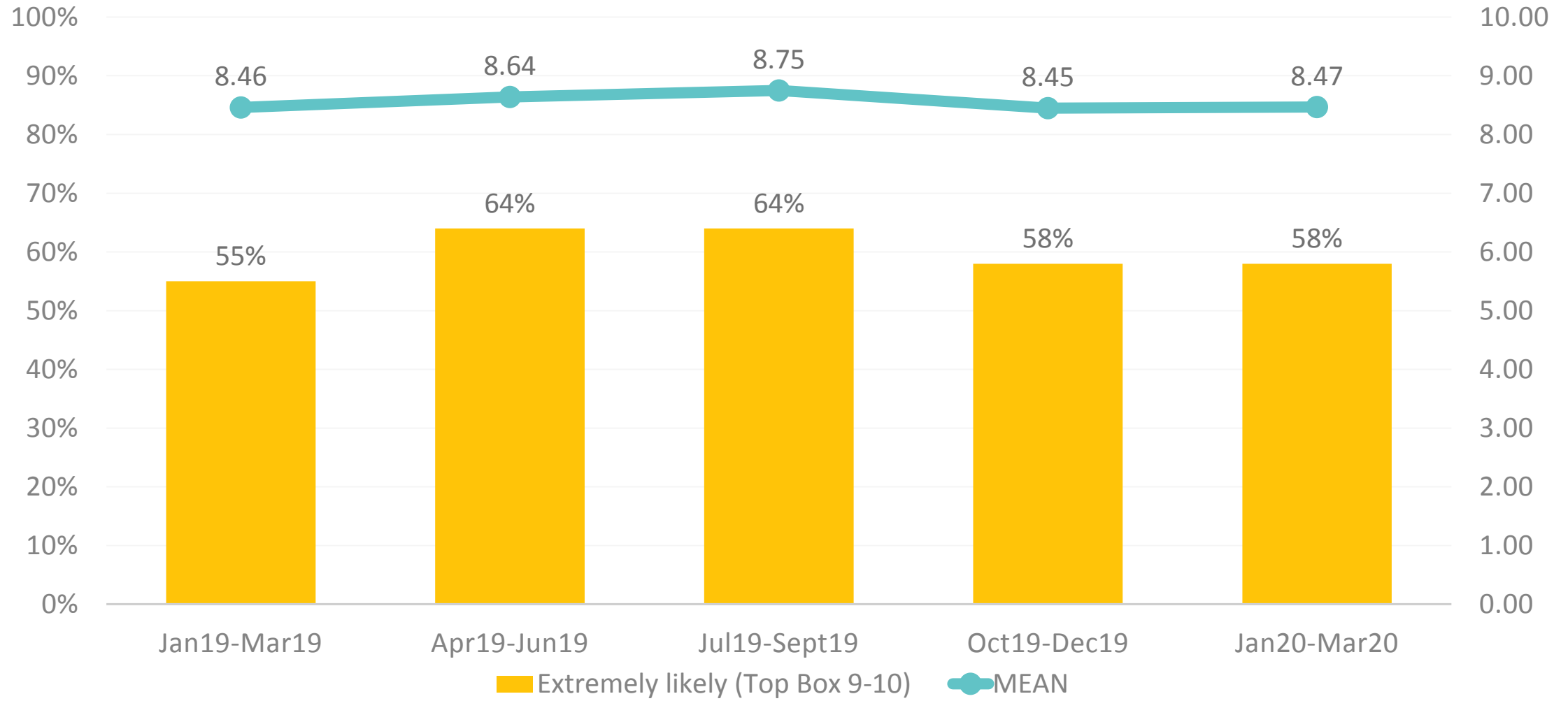
SATISFACTION – SAFETY & SECURITY



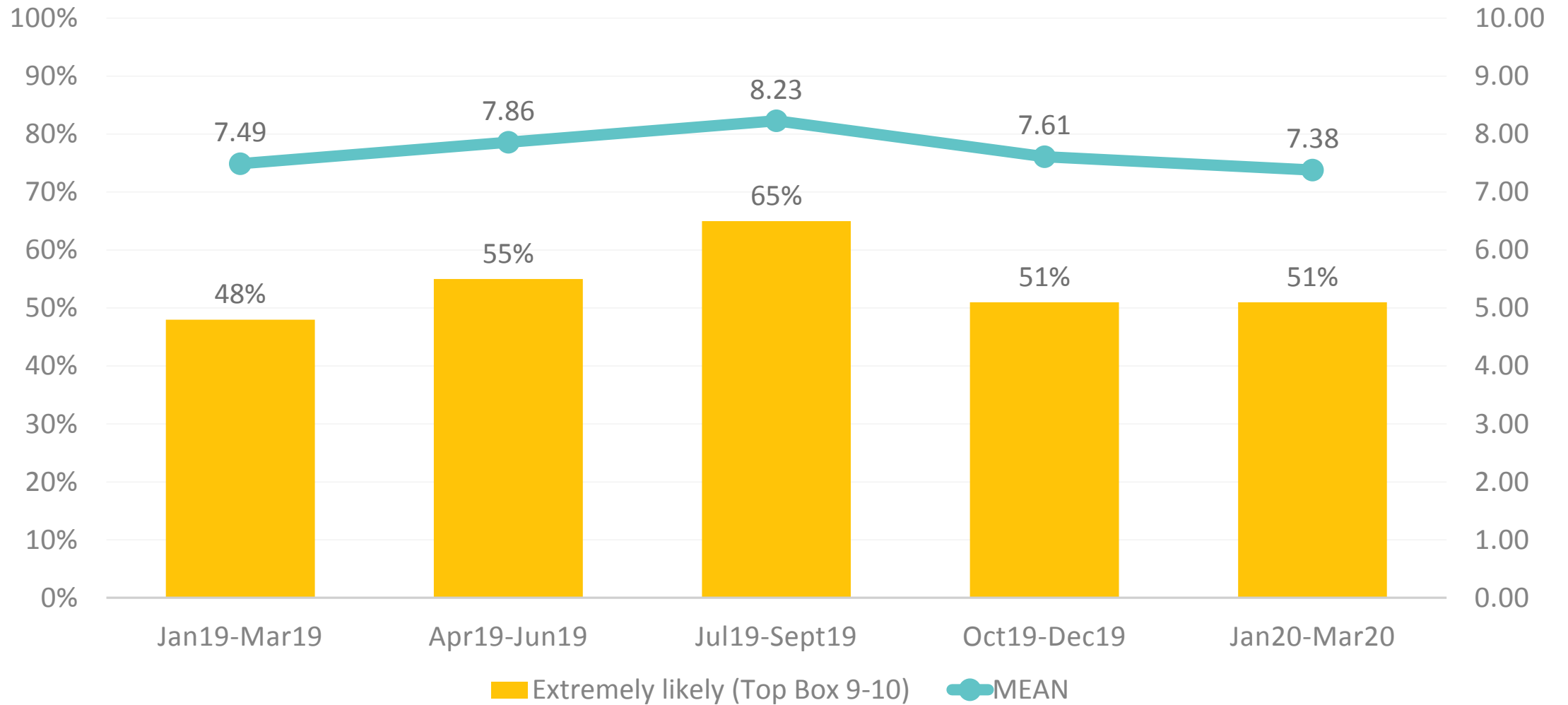
SATISFACTION – ACCOMMODATIONS



BRAND ADVOCACY

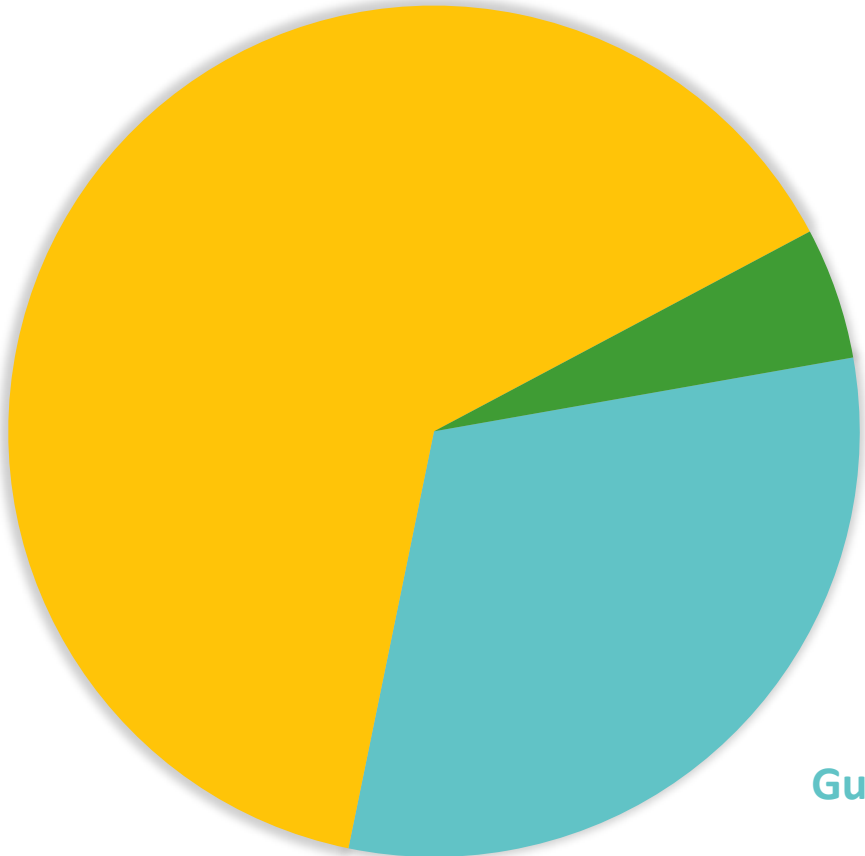


BRAND LOYALTY



TRIP EXPECTATIONS

Guam met my expectations
64%

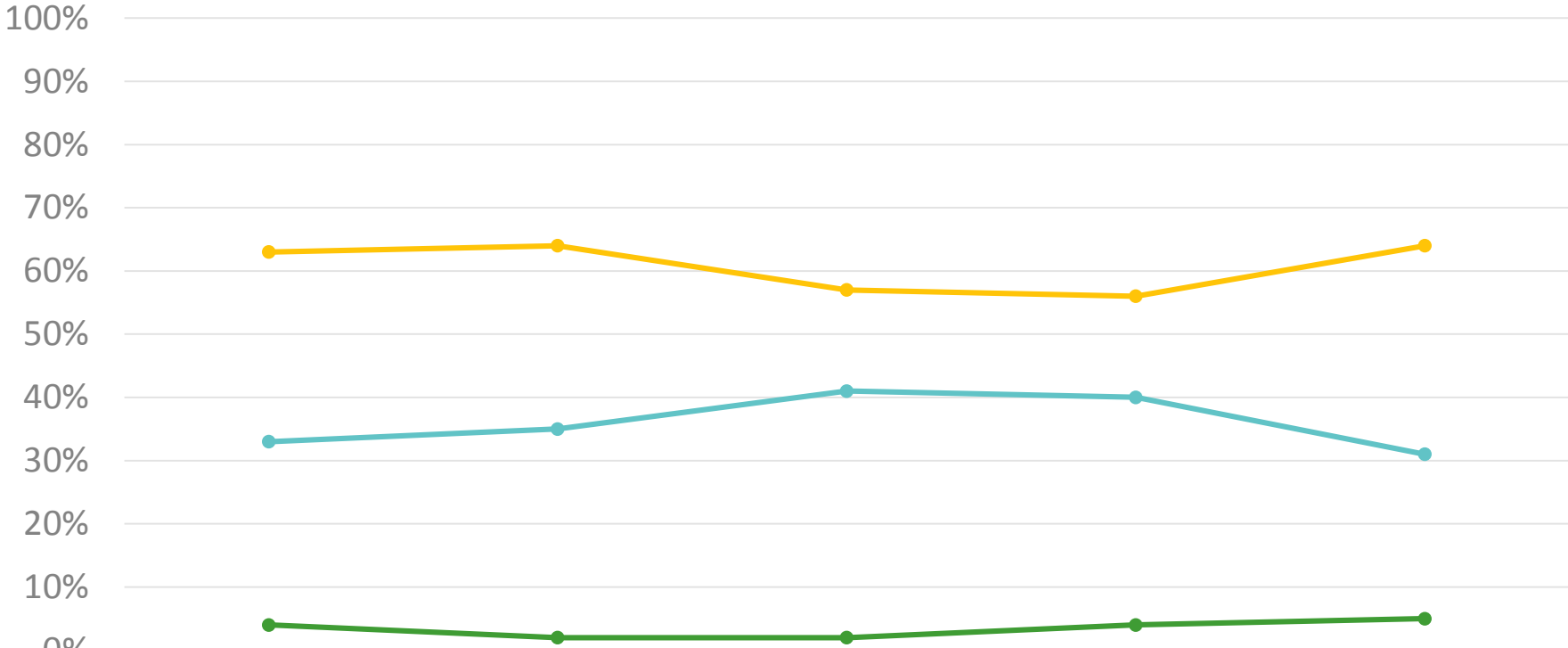


Guam did not meet my expectations
5%

Guam exceeded my expectations
31%

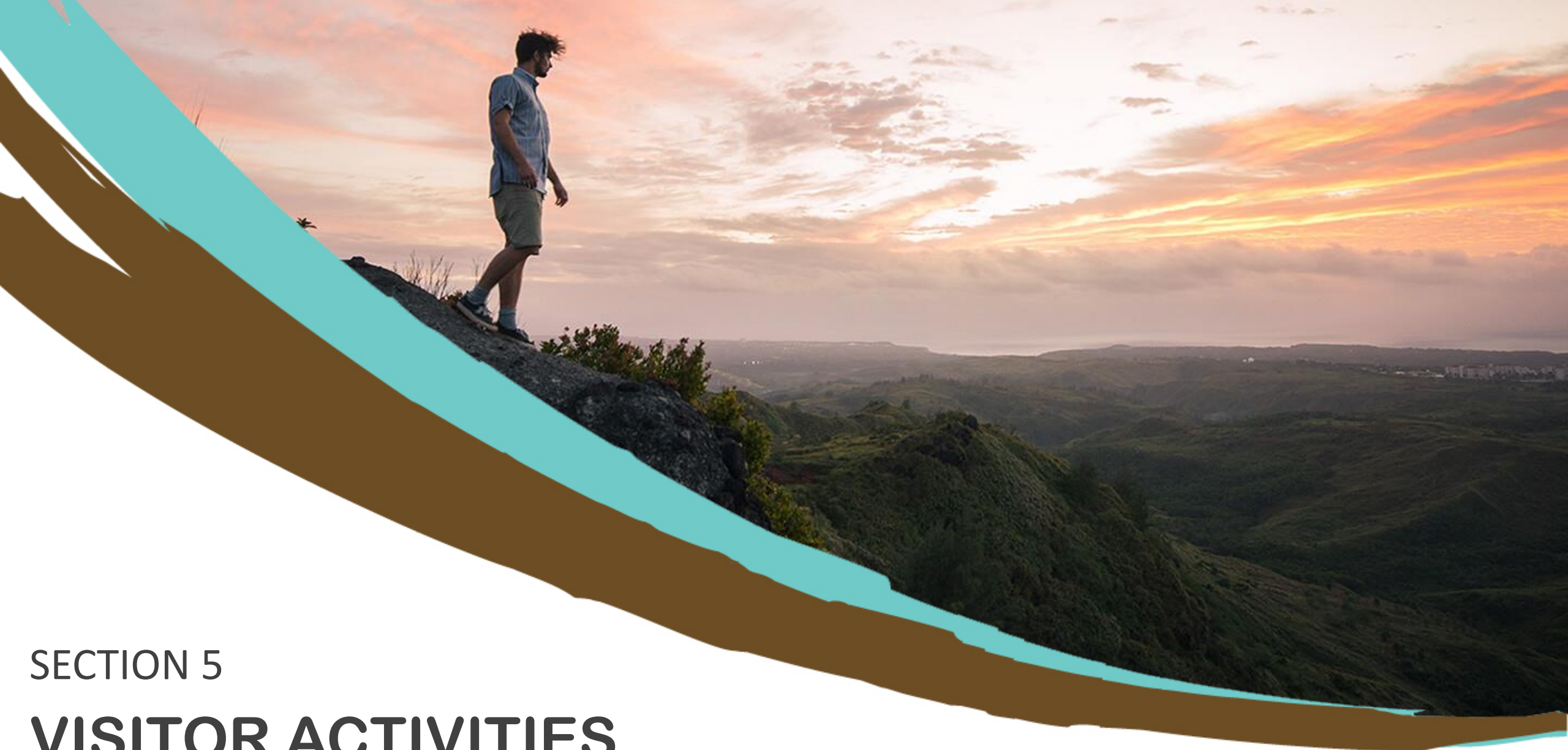


TRIP EXPECTATIONS – TRACKING



	Jan19- Mar19	Apr19- Jun19	Jul19- Sept19	Oct19- Dec19	Jan20- Mar20
Exceeded expectations	33%	35%	41%	40%	31%
Met expectations	63%	64%	57%	56%	64%
Did not meet expectations	4%	2%	2%	4%	5%

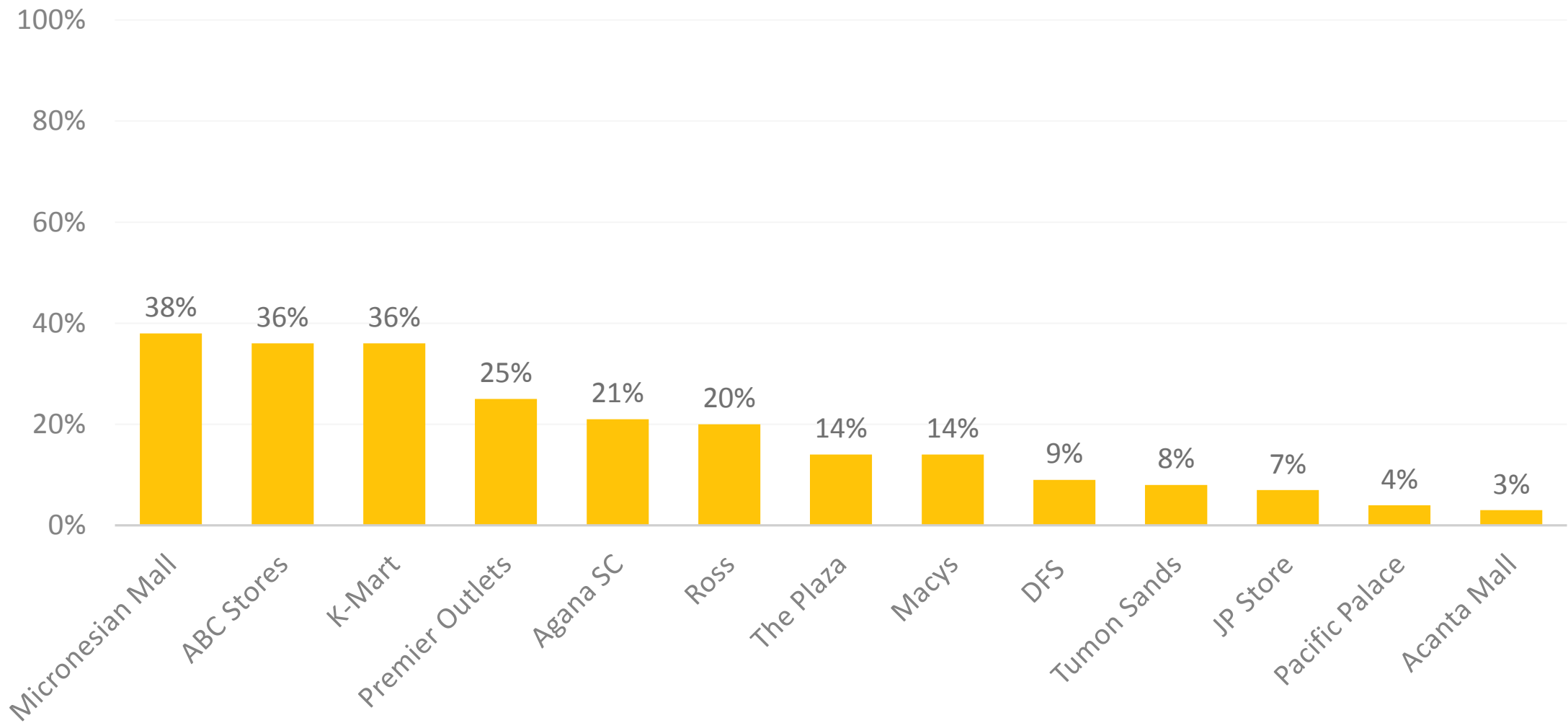




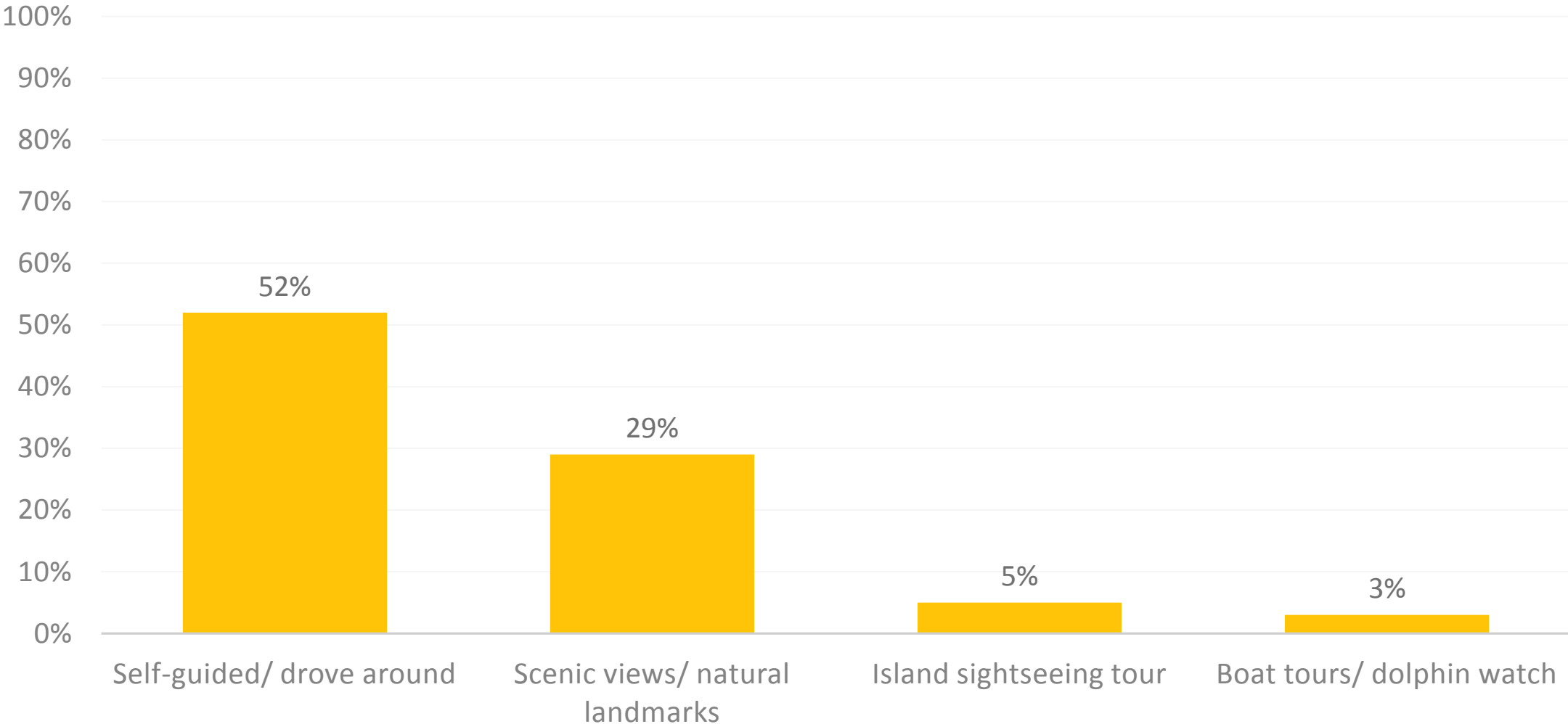
SECTION 5
VISITOR ACTIVITIES



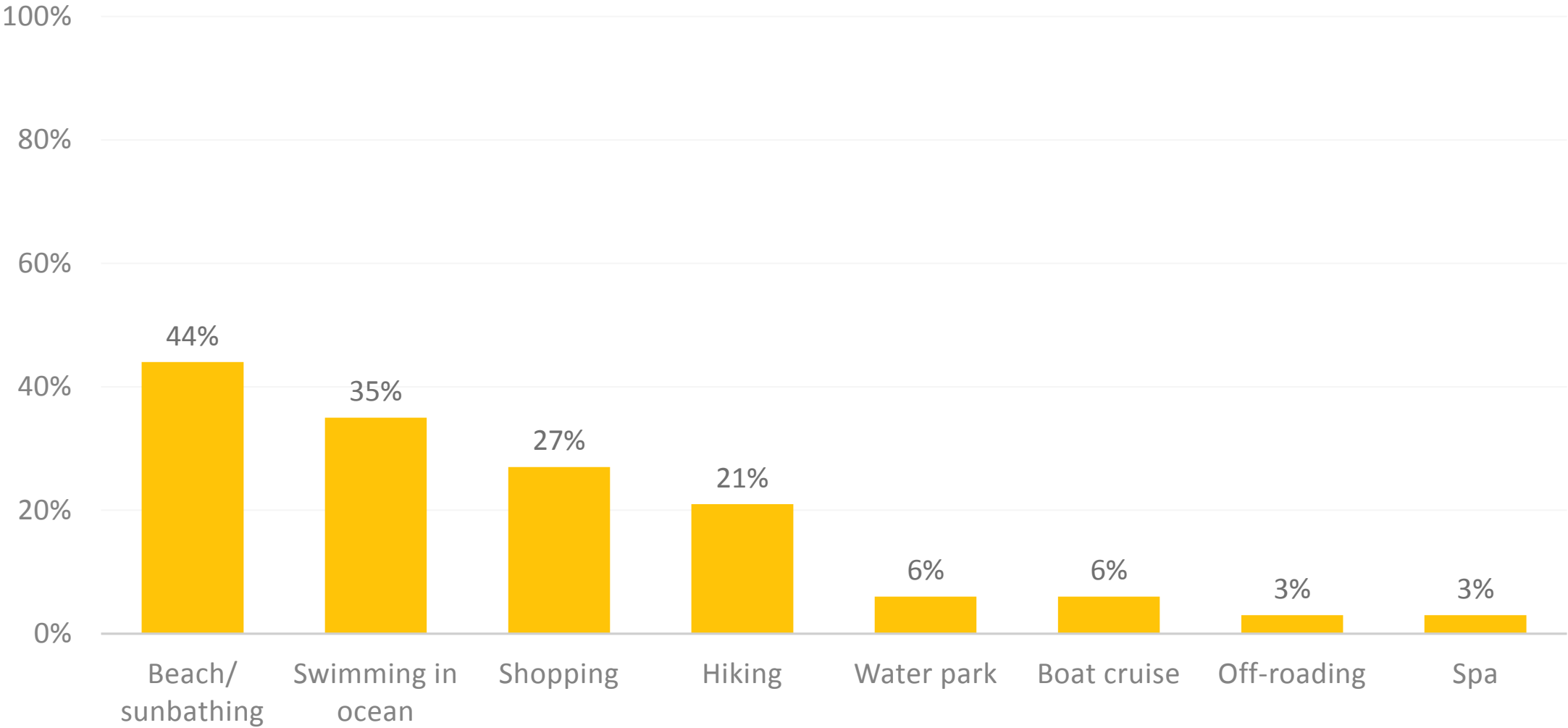
SHOPPING AREAS – PENETRATION



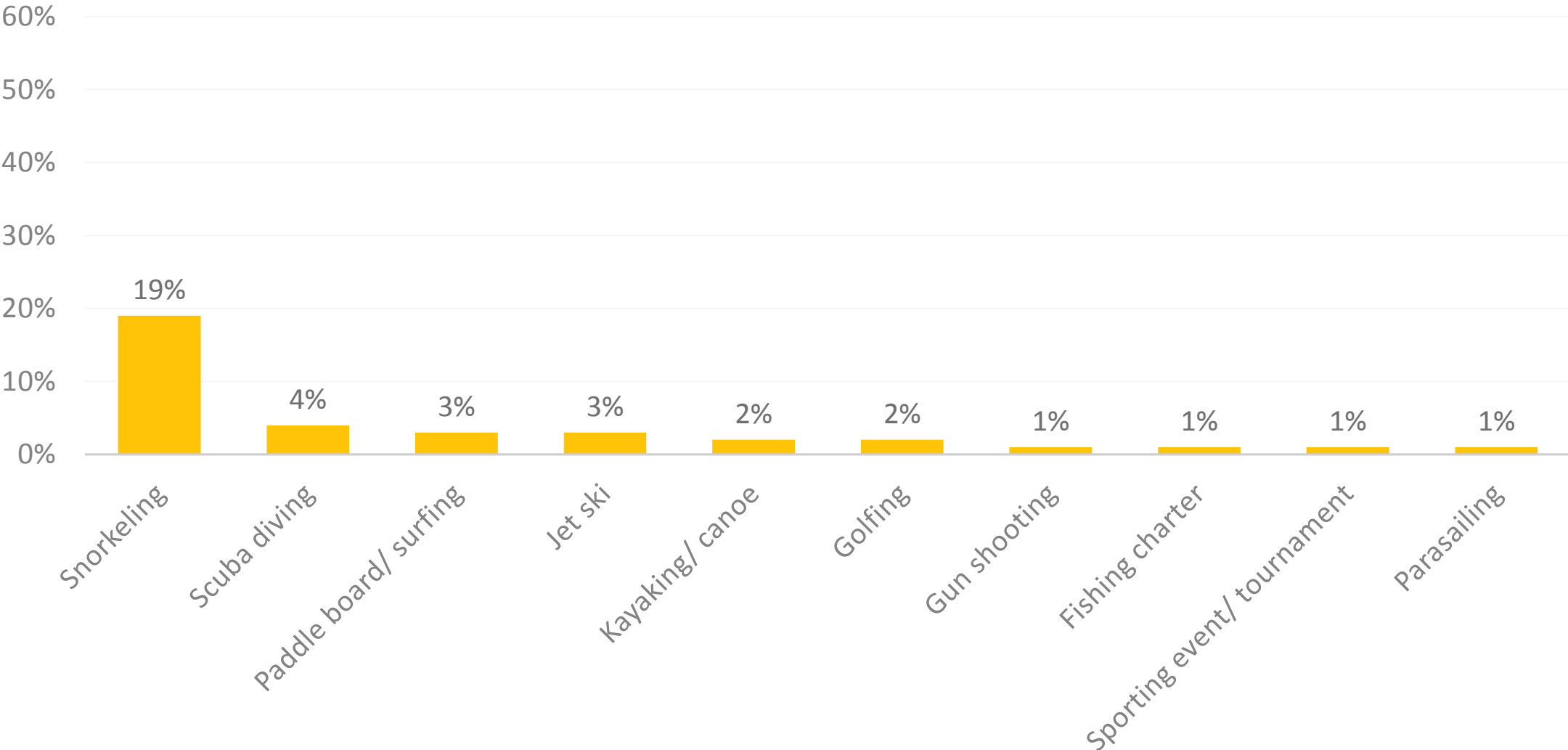
ACTIVITIES – SIGHTSEEING



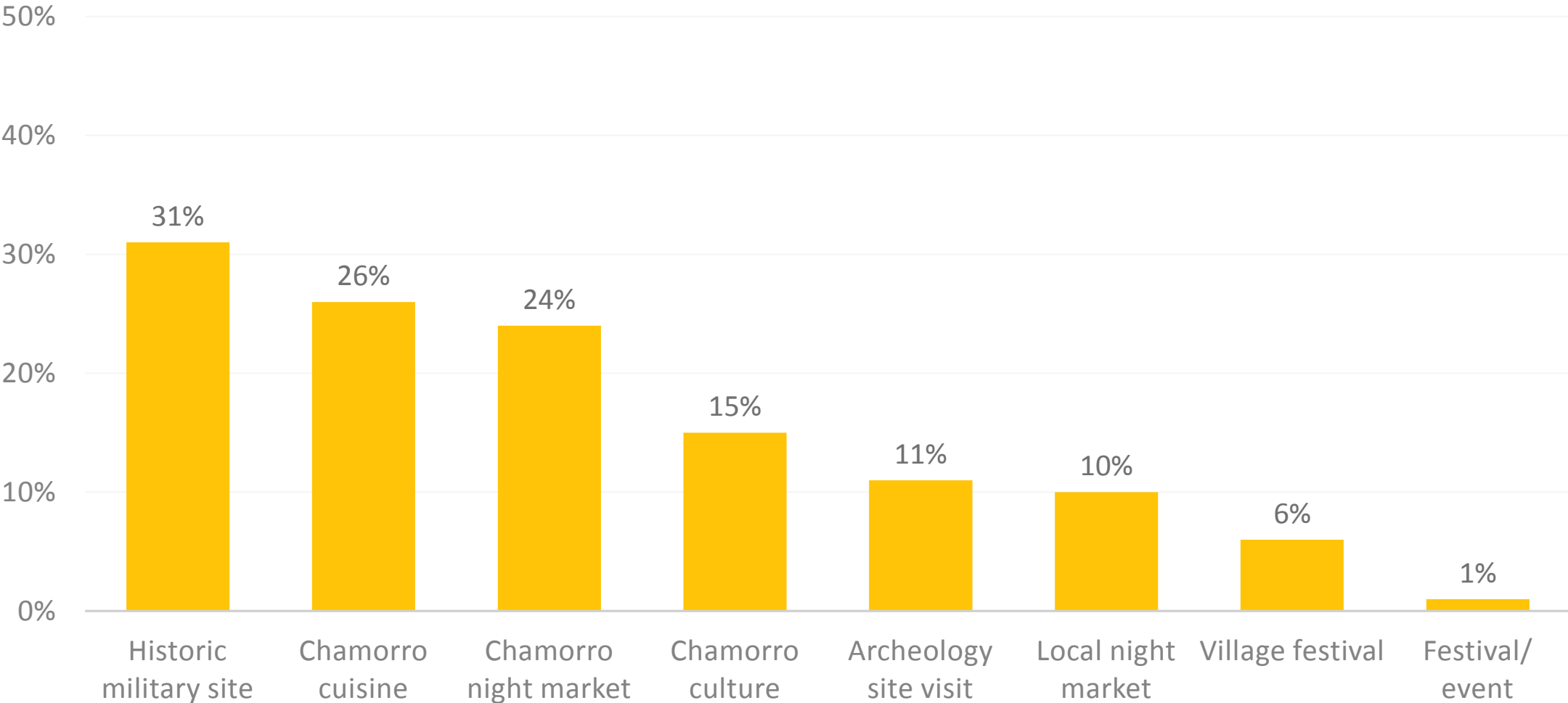
ACTIVITIES – RECREATION



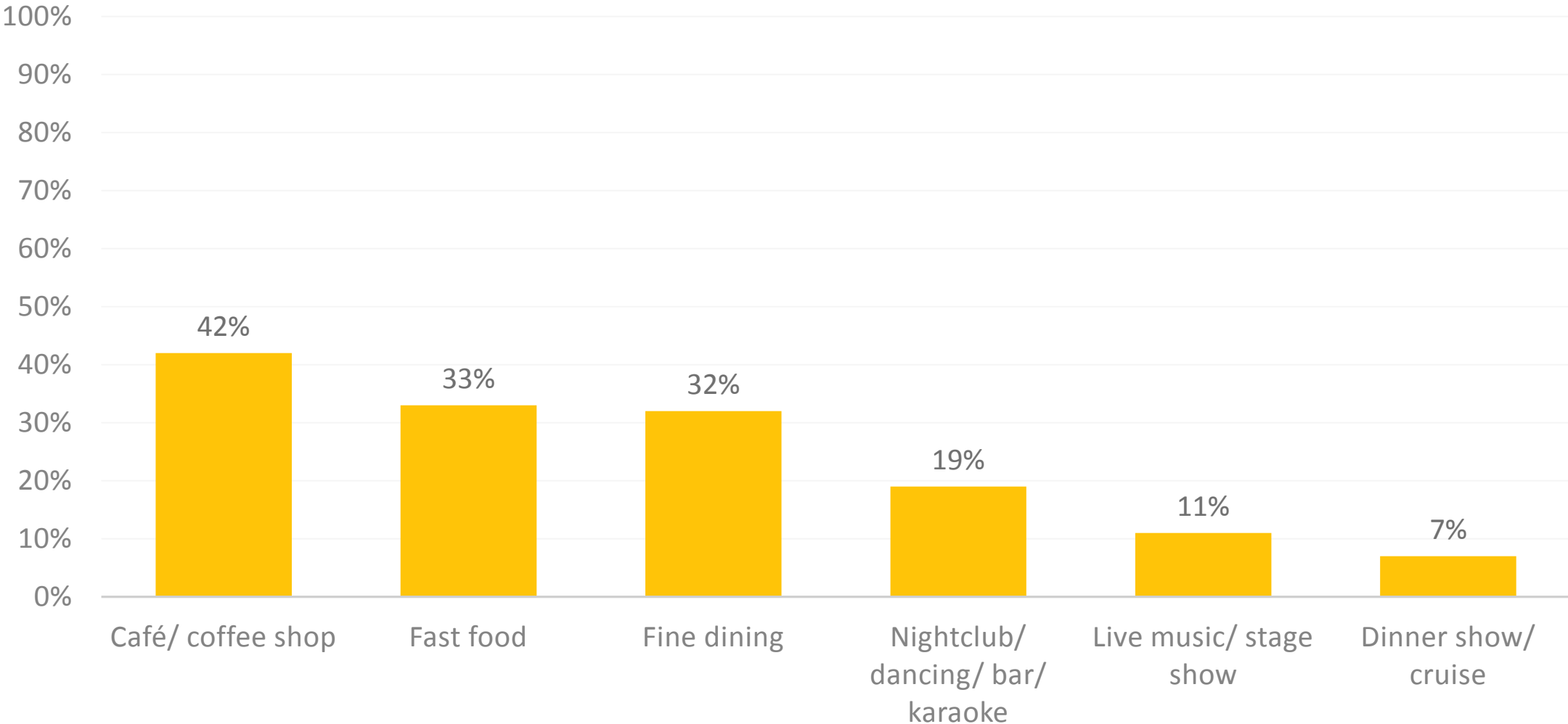
ACTIVITIES – SPORTS



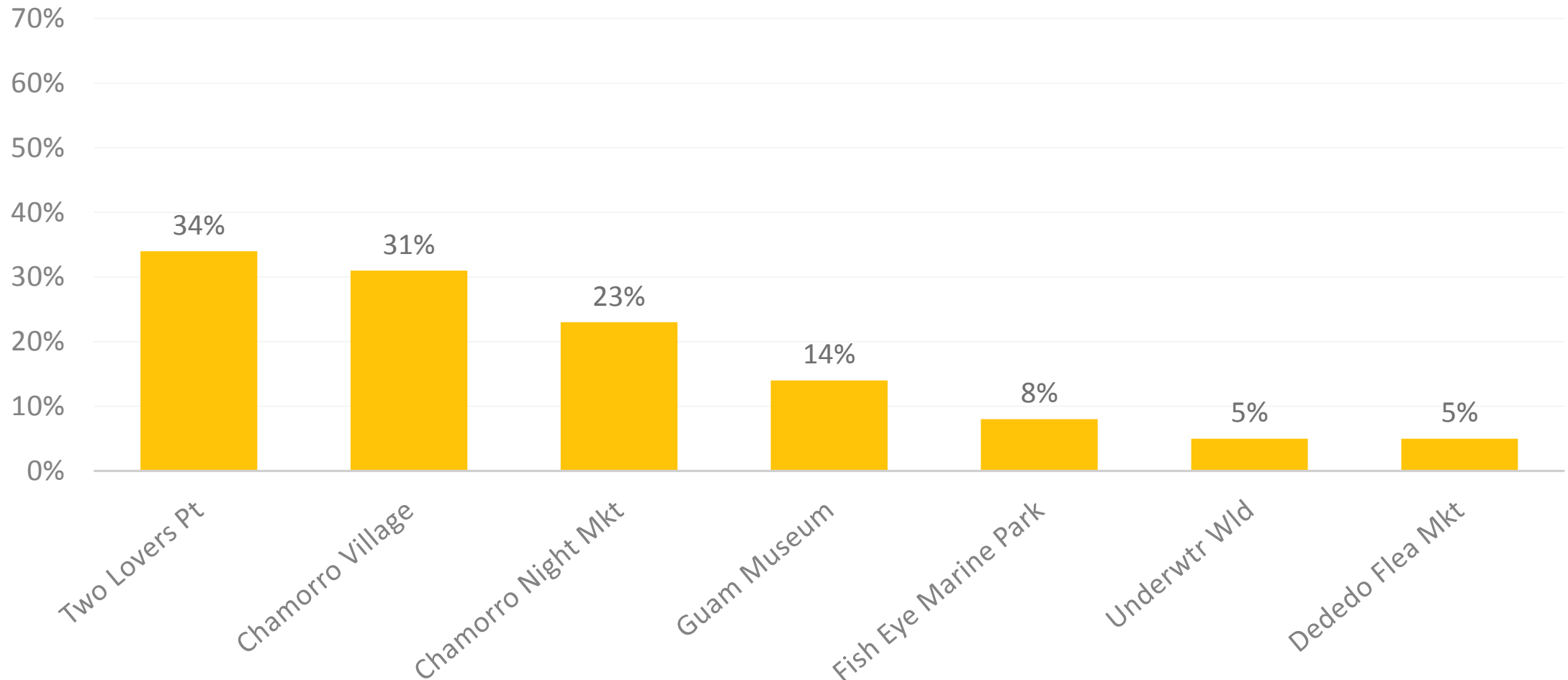
ACTIVITIES – HISTORY, CULTURE, ARTS



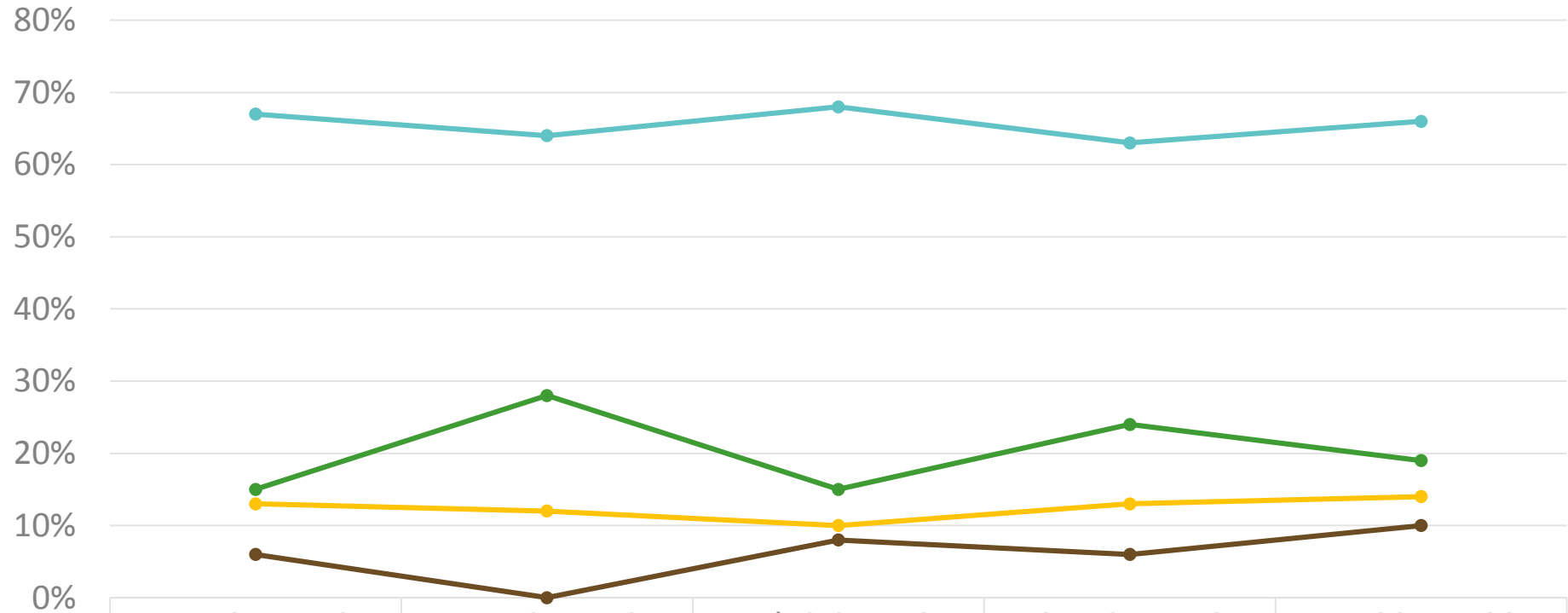
ACTIVITIES – ENTERTAINMENT & DINING



LOCAL ATTRACTIONS – TOP RESPONSES (5%+)



LOCAL CULTURE – OBSTACLES



	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20
Schedule	67%	64%	68%	63%	66%
Unaware	13%	12%	10%	13%	14%
Did not want to	15%	28%	15%	24%	19%
Did not know where	6%	0%	8%	6%	10%

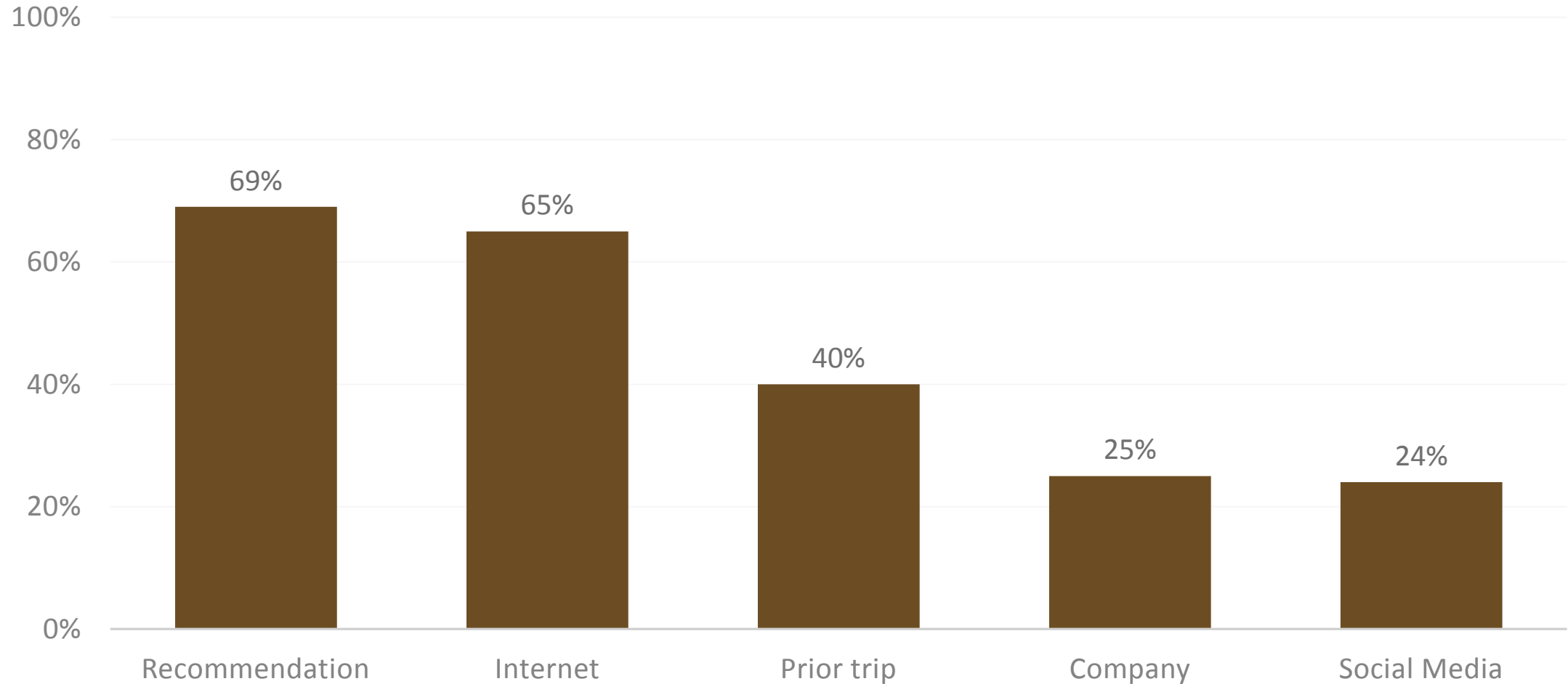


SECTION 6

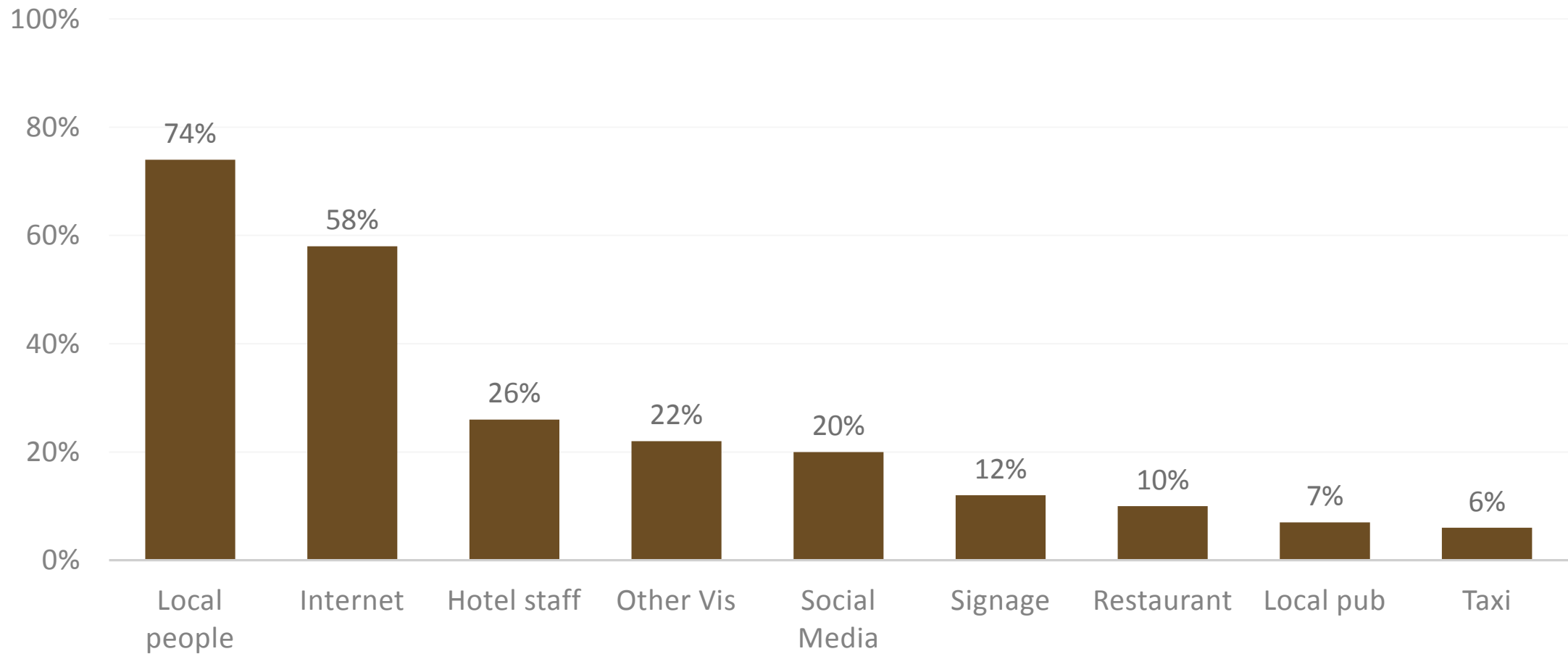
SOURCES OF INFORMATION



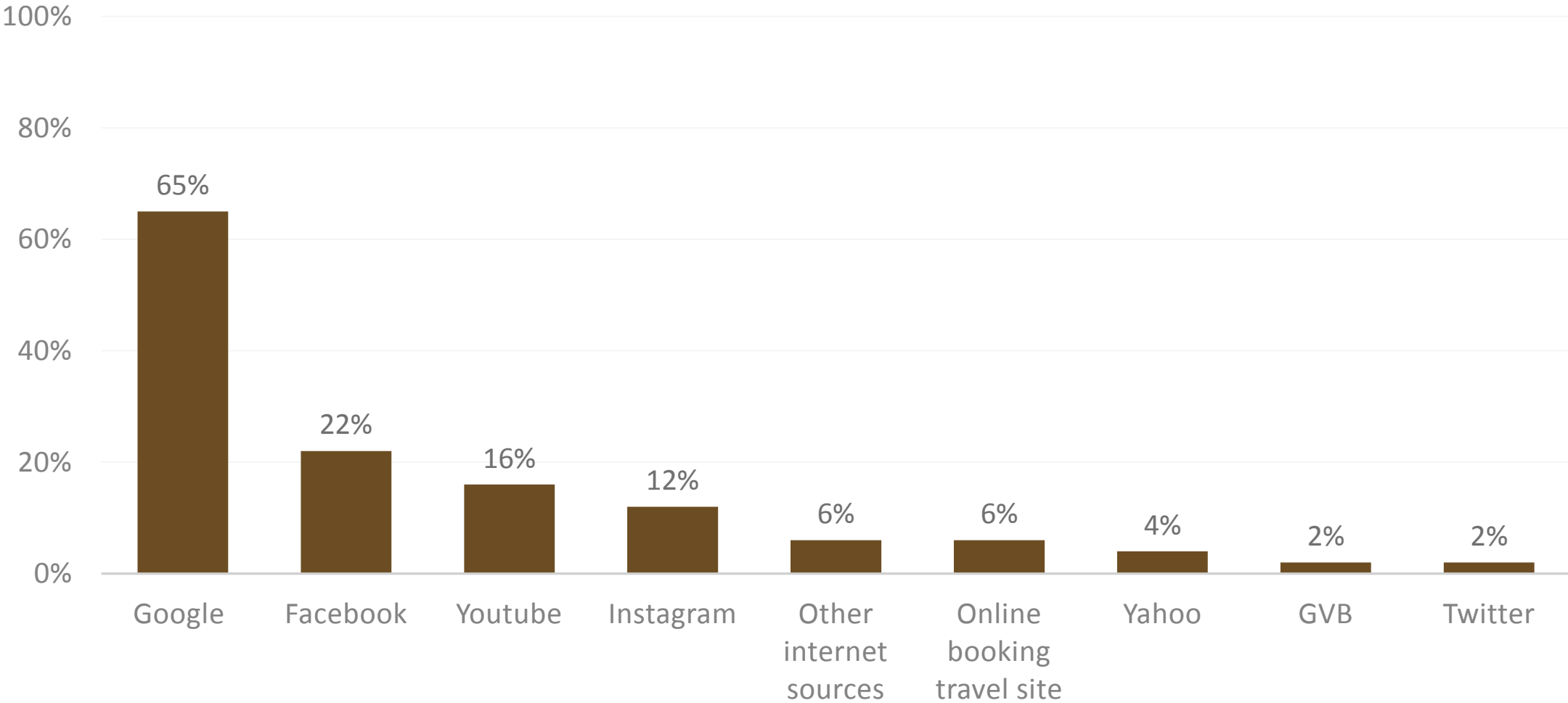
PRE-ARRIVAL SOURCES OF INFORMATION



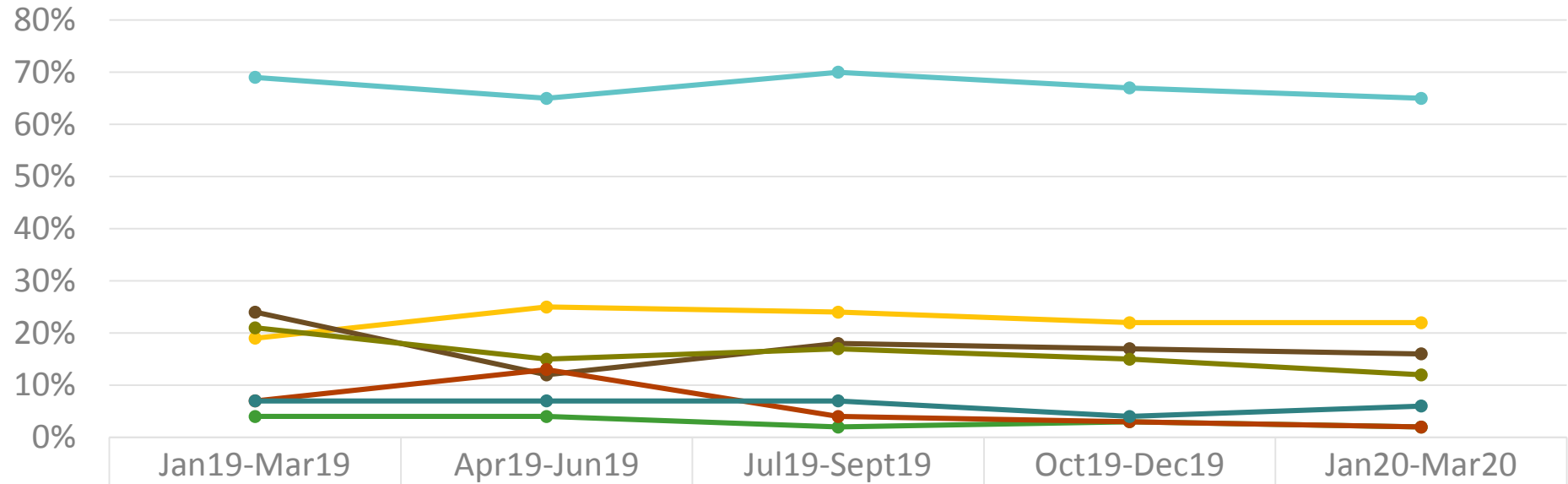
ONISLE SOURCES OF INFORMATION



ONLINE SOURCES OF INFORMATION



ONLINE SOURCES OF INFORMATION



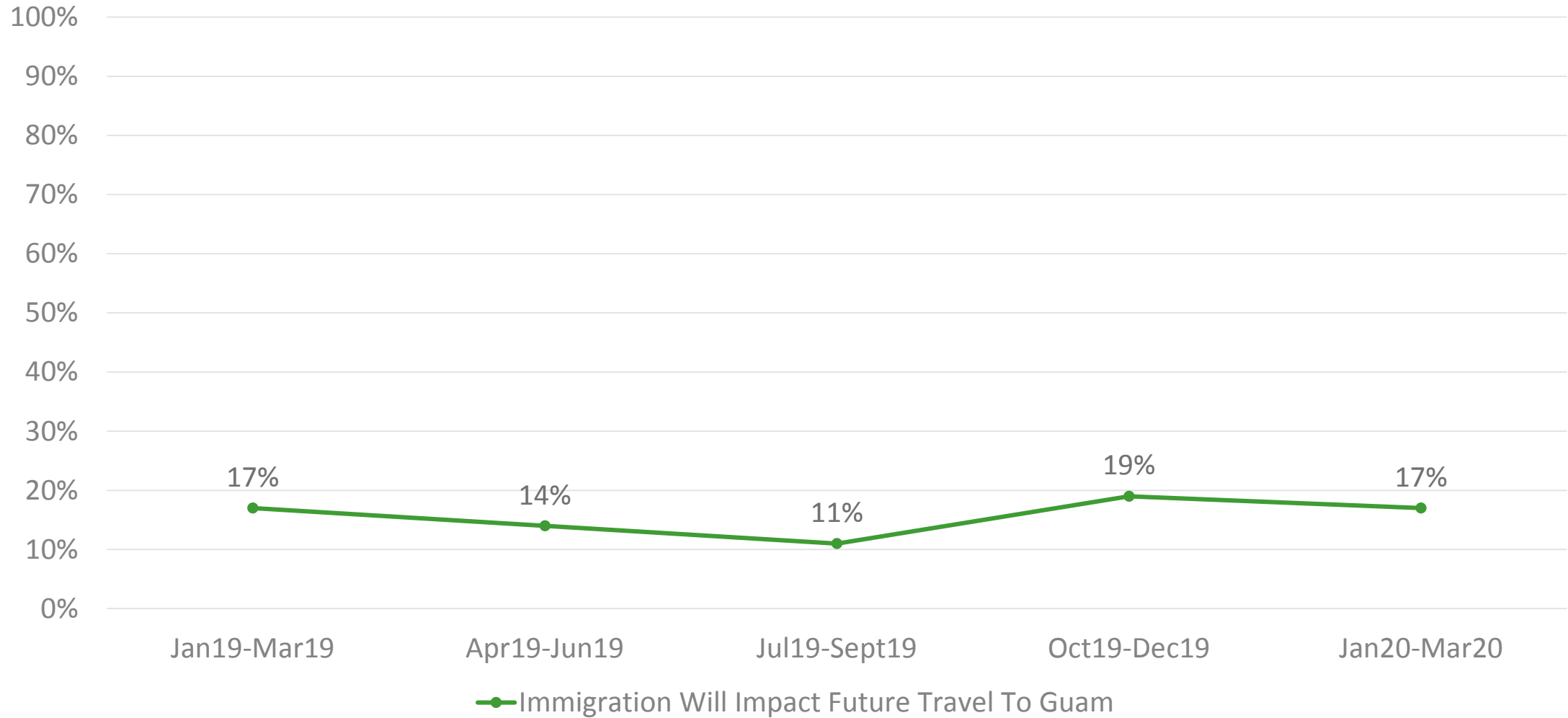
	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19	Jan20-Mar20
Google	69%	65%	70%	67%	65%
Facebook	19%	25%	24%	22%	22%
Twitter	4%	4%	2%	3%	2%
Youtube	24%	12%	18%	17%	16%
IG	21%	15%	17%	15%	12%
GVB	7%	13%	4%	3%	2%
Online booking site	7%	7%	7%	4%	6%



SECTION 7
IMMIGRATION



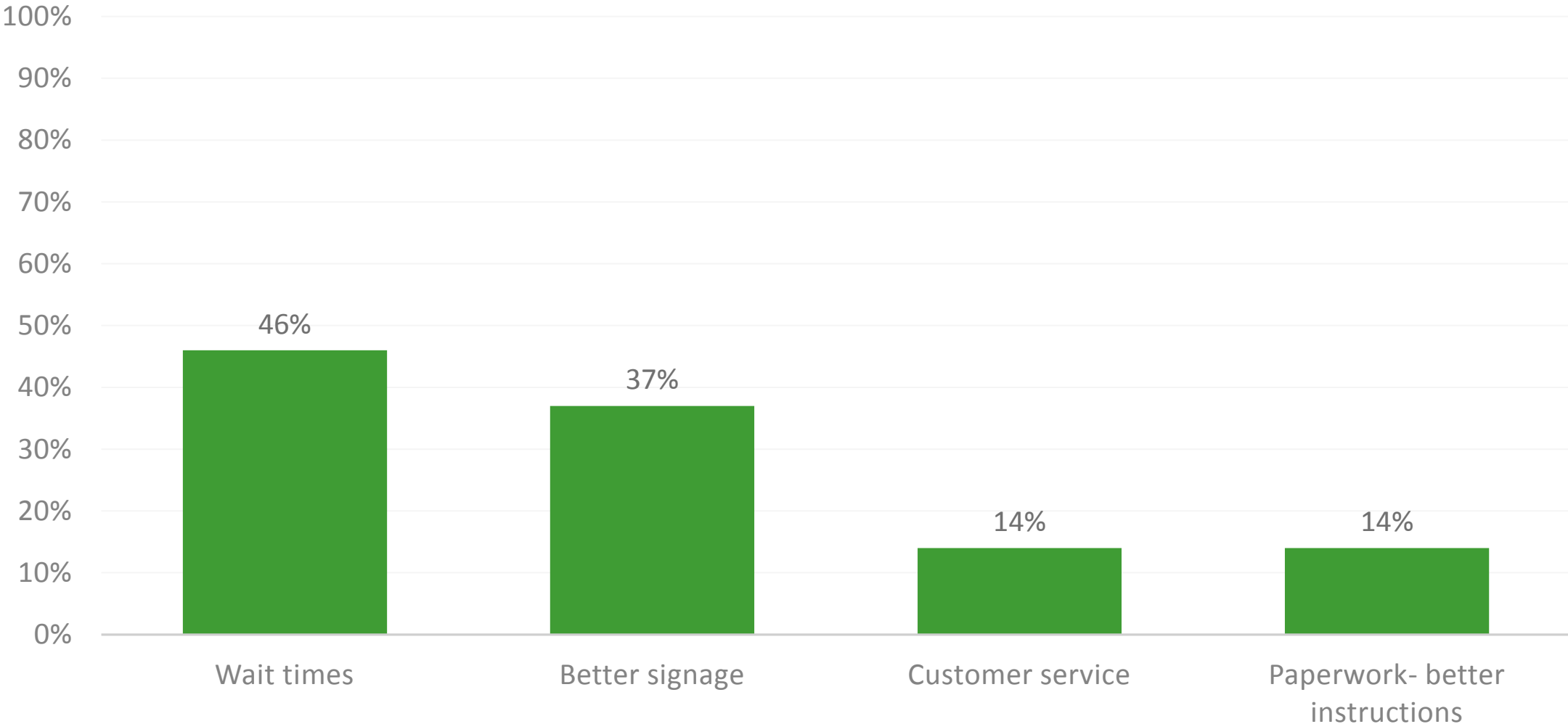
IMPACT OF AIRPORT IMMIGRATION SVC ON FUTURE TRAVEL TO GUAM



Q: Do you think the security screening and/or immigration process here at the Guam International Airport will affect your decisions to visit Guam again in the future?



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, Oct-Dec 2019 (1st Qtr. 2020), Jan-Mar 2020 (2nd Qtr. 2020)

	Oct-Dec 2019	Jan-Mar 2020	Oct 2019- Mar 2020
Drivers:	rank	rank	rank
Entertainment	2		2
Shopping			
Dining			
Beaches			
Parks		2	
Roads			
Sightseeing Areas			
Being a safe and secure destination	1	1	1
% of Overall Satisfaction Accounted For:	36.5%	28.1%	32.7%

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 January – March 2020 Period. By rank order they are:
 - **Being a safe & secure destination, and**
 - **Parks.**
- With these factors the overall r^2 is .281, meaning that **28.1% of overall satisfaction is accounted for by these factors.**

DRIVERS – ONISLE EXPENDITURES

Comparison of Drivers of Per Person On Island Expenditures, Oct-Dec 2019 (1st Qtr. 2020), Jan-Mar 2020 (2nd Qtr. 2020)

	Oct-Dec 2019	Jan-Mar 2020	Oct 2019 - Mar 2020
Drivers:	rank	rank	rank
Entertainment			
Shopping			
Dining			
Beaches	1		1
Parks		1	
Roads			
Sightseeing Areas		2	2
Being a safe and secure destination			
% of Overall Satisfaction Accounted For:	9.1%	10.1%	6.7%

NOTE: Only significant drivers are included.

DRIVERS – ONISLE EXPENDITURES

- **Per Person On Island Expenditure** of U.S. visitors on Guam is driven by two significant factors in the January – March 2020 Period. By rank order they are:
 - **Parks, and**
 - **Sightseeing areas.**
- With these factors, the overall r^2 is .101, meaning that **10.1% of per person on island expenditure is accounted for by these factors.**