Guam Visitors Bureau

Korean Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

AUGUST 2017

Prepared by: Anthology Research

VISIT GUAM 2017 YEAR of LOVE

[ANTHOLOGY]
AnthologyGroup.com

GUAM VISITORS BUREAU
SETBISION BISITAN GUÅHAN

GUAM

Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.

- A total of **365** departing Korean 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 **365** is +/- 5.10 percentage points with a 95% confidence level. That is, if all Korean 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 +/- 5.10 percentage points.

Objectives

- To monitor the effectiveness of the Korean seasonal campaigns in attracting Korean visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Korea marketing plan.

- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

[A]

Key Highlighted Segments

- **The specific objectives were:**

  - To determine the relative size and expenditure behavior of the following market segments:

    - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)

    - Leisure Traveler (Q5A Here to relax/ Here to see beaches, tropical climate, here for pleasure)

    - Wedding (Q5A)

    - Honeymoon (Q5A)

    - Group Tour (Q6)

    - Repeat Visitor (Q3)

    - FIT (Q7 Direct with airline/ hotel or online 3rd party travel site)

    - FAMILY (Q5 traveling with spouse/ child/ adult child/ adult family)

  - To identify the most significant factors affecting overall visitor satisfaction.

  - To identify (for all Korean visitors) the most important determinants of on-island spending

[A]

Key Highlighted Segments
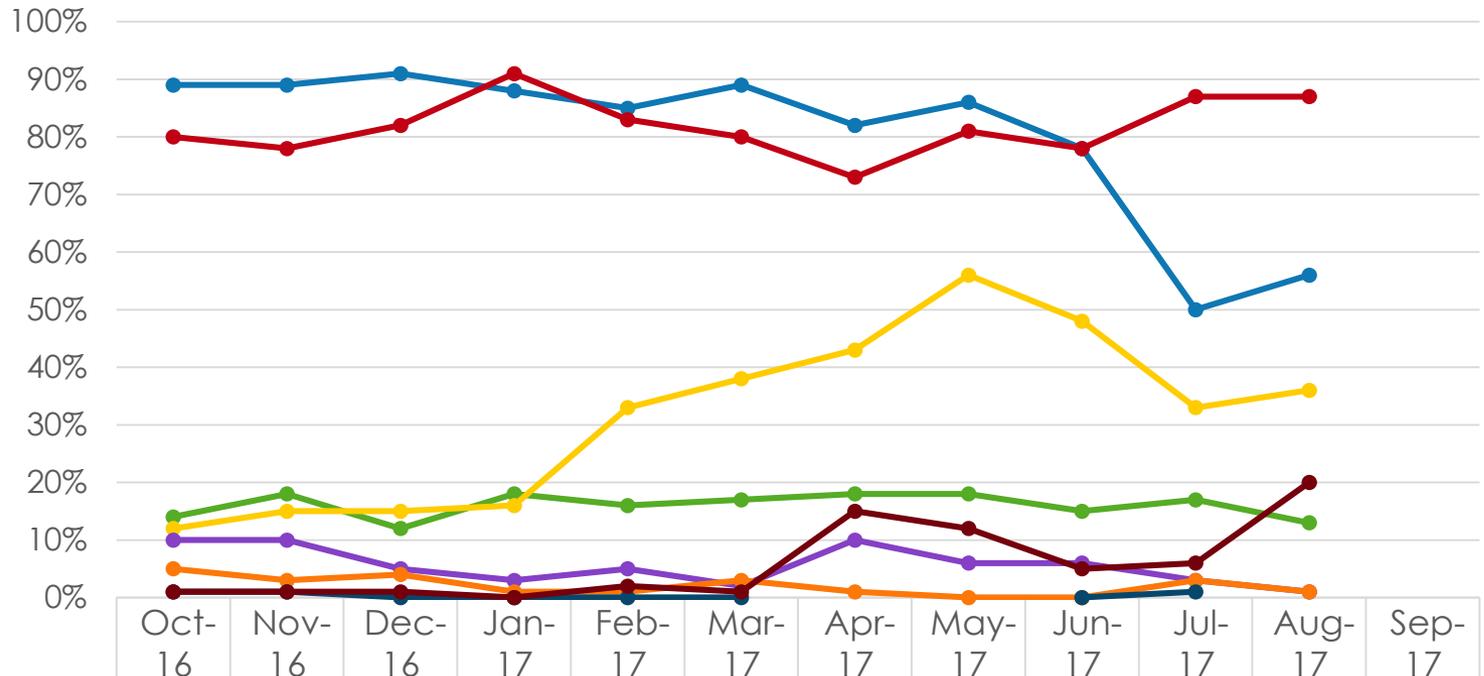
|	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Leisure Traveler	89%	89%	91%	88%	85%	89%	82%	86%	78%	50%	56%	
Family	80%	78%	82%	91%	83%	80%	73%	81%	78%	87%	87%	
Repeat	14%	18%	12%	18%	16%	17%	18%	18%	15%	17%	13%	
FIT	12%	15%	15%	16%	33%	38%	43%	56%	48%	33%	36%	
Honey-moon	10%	10%	5%	3%	5%	2%	10%	6%	6%	3%	1%	
MICE	5%	3%	4%	1%	1%	3%	1%	0%	0%	3%	1%	
Wedding	1%	1%	0%	0%	0%	0%			0%	1%		
Group	1%	1%	1%	0%	2%	1%	15%	12%	5%	6%	20%	

[A]

SECTION 1
PROFILE OF RESPONDENTS

[A]
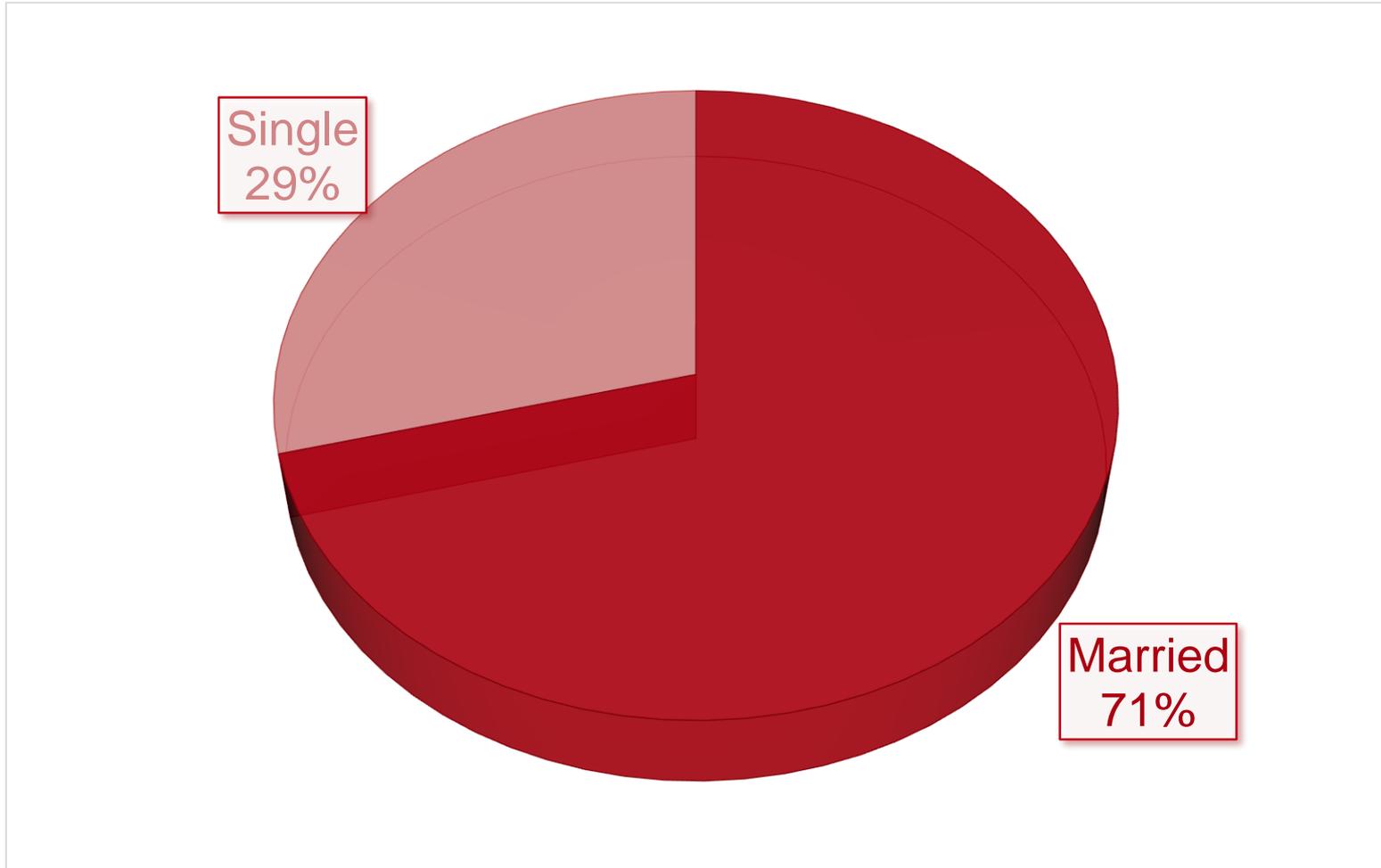
Marital Status

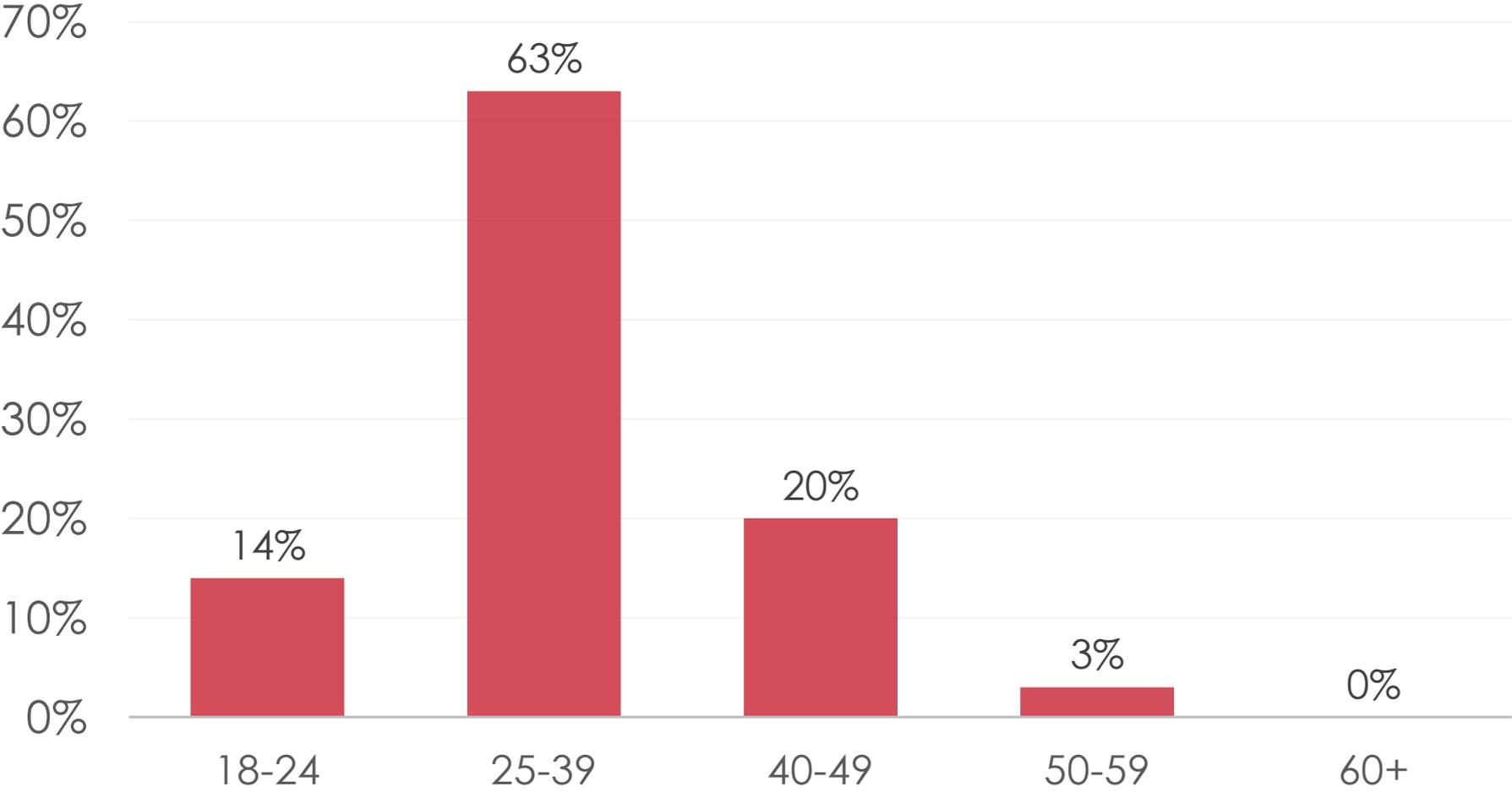# Marital status – FY2017 Tracking

8
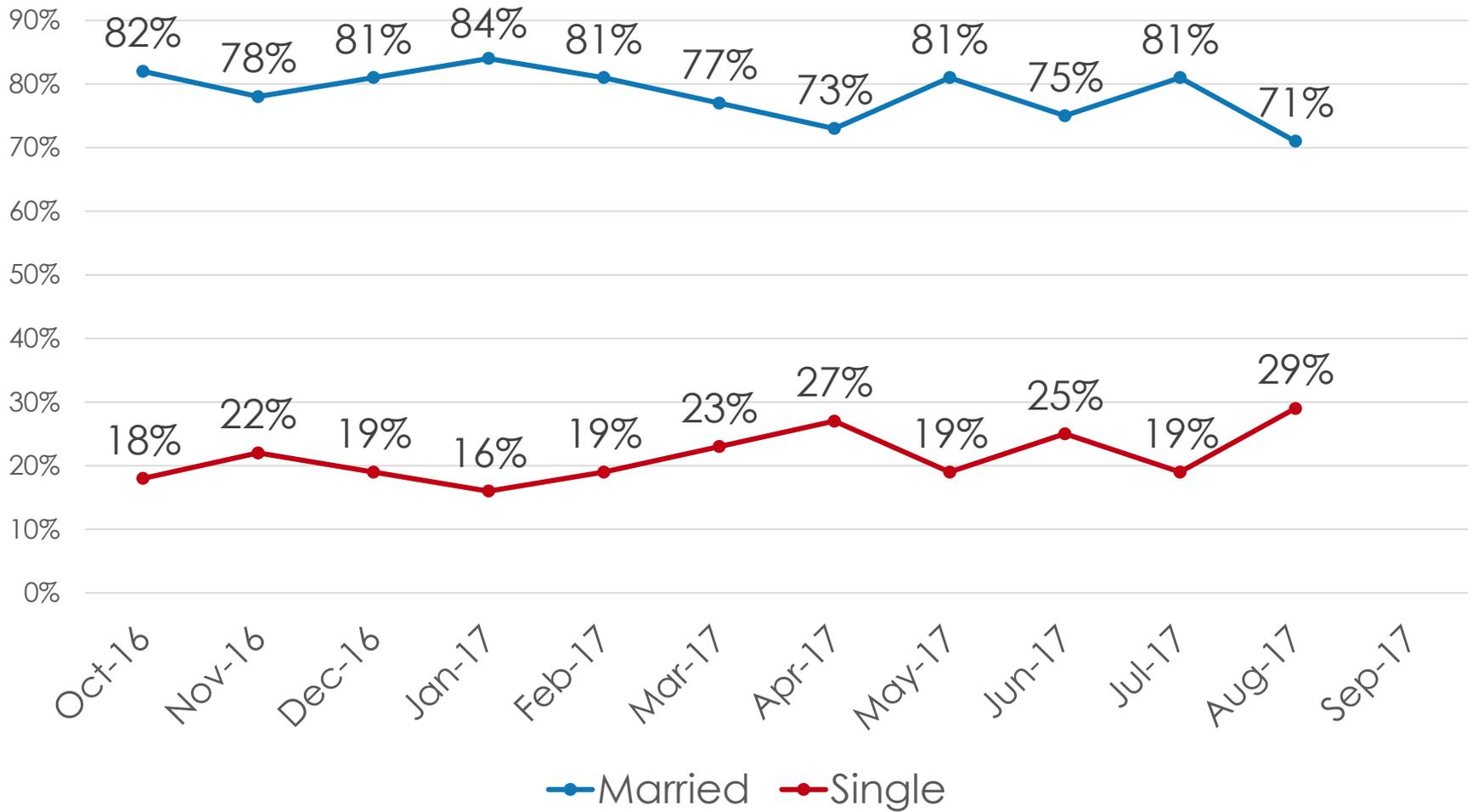
Marital status – Key Segments

GVB EXIT SURVEY
QE MARITAL STATUS

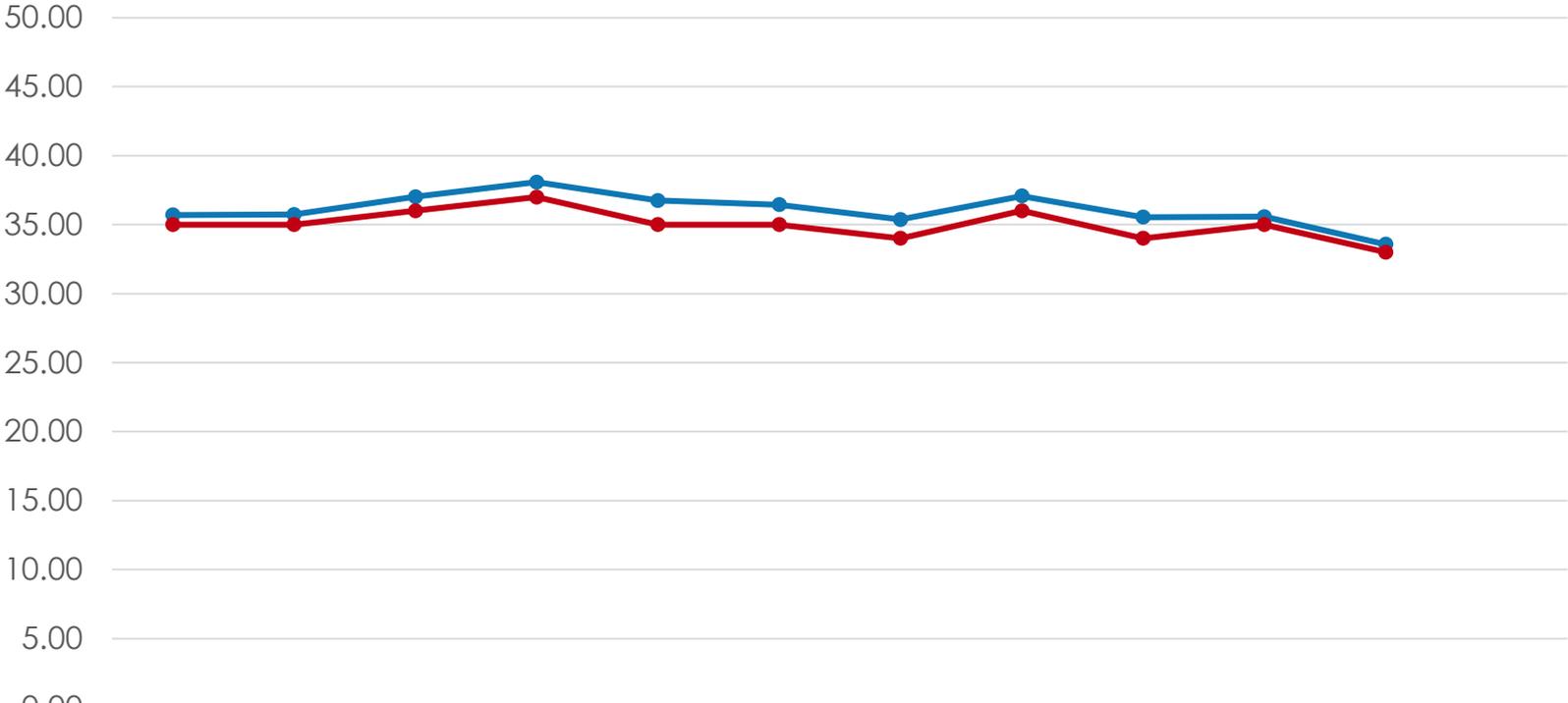|		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
QE	Married	71%	67%	100%		71%	72%	73%	81%	56%
	Single	29%	33%			29%	28%	27%	19%	44%
	Total	365	3	5		206	74	49	318	133

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[A]

Age

MEAN = 33.57
MEDIAN = 33

[A]

Age – FY2017 Tracking

|	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	35.70	35.73	37.02	38.08	36.75	36.44	35.37	37.07	35.54	35.57	33.57	
MEDIAN	35	35	36	37	35	35	34	36	34	35	33	

[A]

Age – Key Segments

GVB EXIT SURVEY
AGE

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
SD	18-24	14%	33%			10%	28%	18%	15%	13%
	25-39	63%	67%	100%		63%	53%	47%	58%	75%
	40-49	20%				22%	18%	24%	23%	11%
	50-59	3%				4%	1%	10%	3%	1%
	60+	0%				0%			0%	
	Total	365	3	5		206	74	49	318	133
SD	Mean	33.57	29.00	30.40	.	34.50	31.43	35.18	34.36	31.30
	Median	33	32	30	.	34	32	35	34	31

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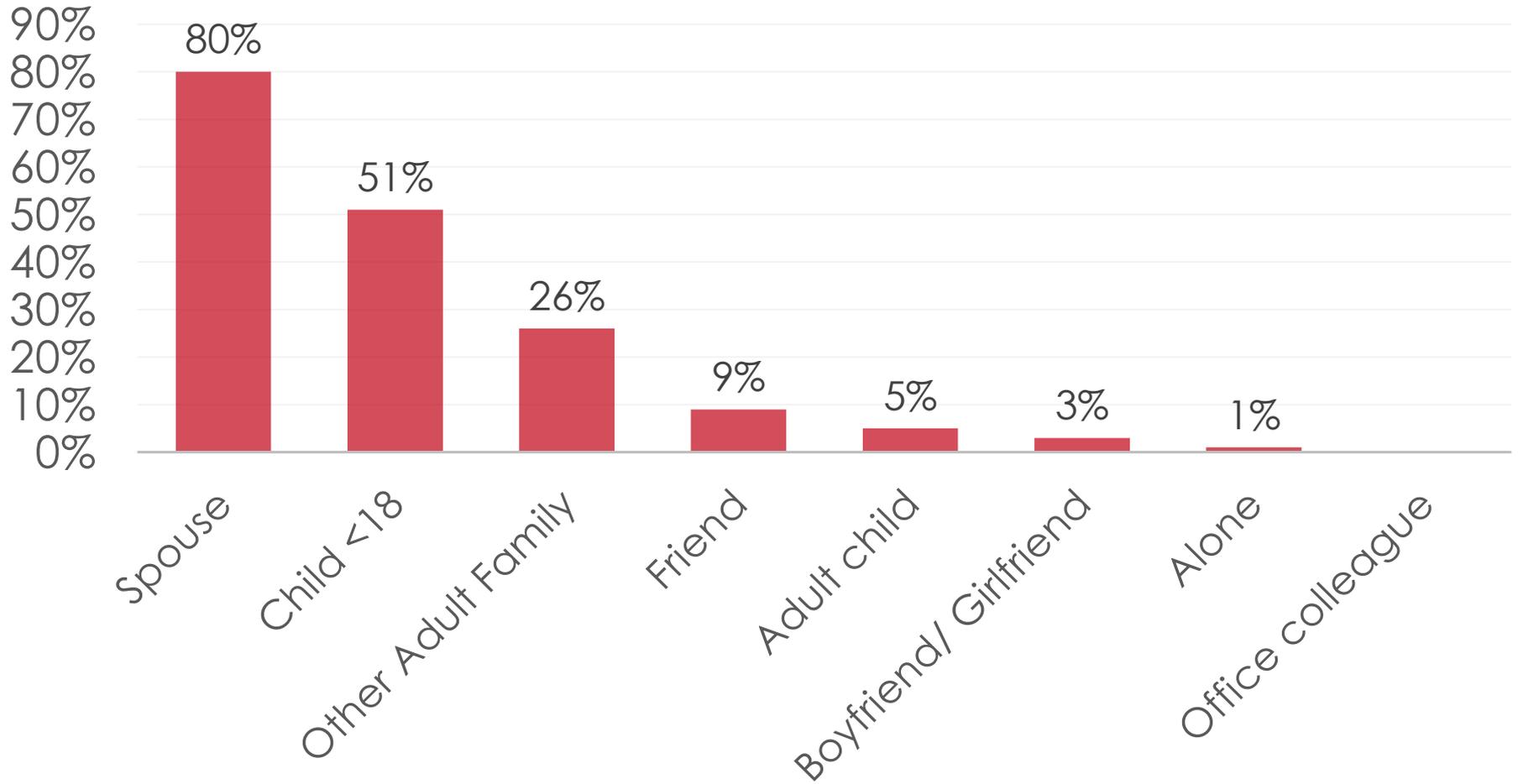
[A]

Annual Household Income
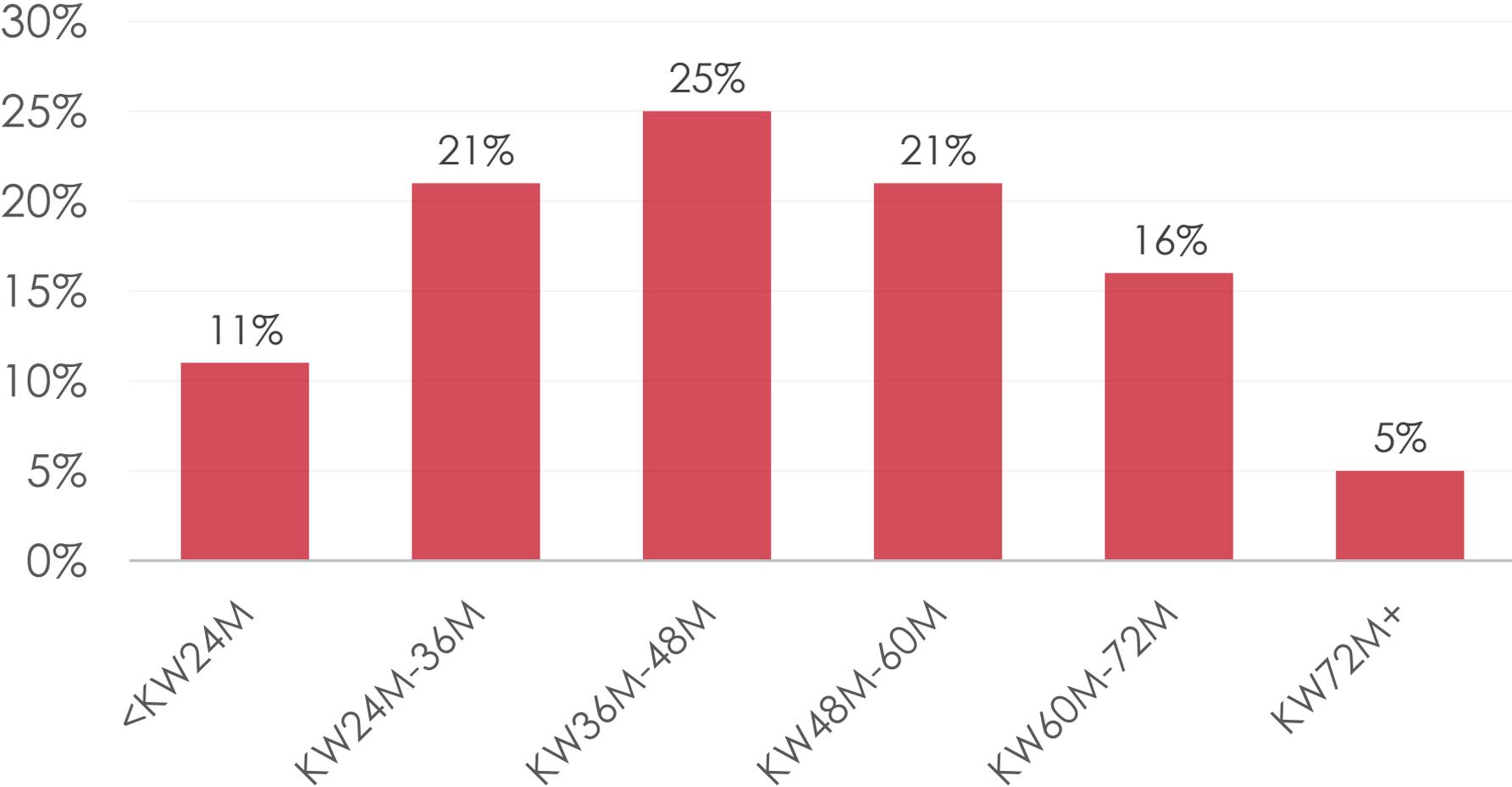
Annual Household Income – Key Segments

GVB EXIT SURVEY
Q26 Household income:

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
Q26	Up to KW12,000,000	3%				3%				8%
	KW12,000,001 ~ KW24,000,000	8%		20%		11%	3%	6%	3%	16%
	KW24,000,001 ~ KW36,000,000	21%		40%		24%	22%	16%	21%	26%
	KW36,000,001 ~ KW48,000,000	25%	100%	20%		19%	34%	18%	28%	21%
	KW48,000,001 ~ KW60,000,000	21%		20%		18%	15%	29%	24%	12%
	KW60,000,001 ~ KW72,000,000	16%				17%	26%	24%	18%	8%
	More than KW72,000,001	5%				7%	1%	6%	6%	7%
	No Income	2%				2%			0%	3%
	Total	365	3	5		206	74	49	318	133

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Travel Party

Bar chart showing travel party percentages: Spouse 80%, Child <18 51%, Other Adult Family 26%, Friend 9%, Adult child 5%, Boyfriend/Girlfriend 3%, Alone 1%, Office colleague (no value shown).

[A]

Travel Party - Children

51% TRAVELING WITH A CHILD

[A]

Trips to Guam

Repeat
13%

First time
87%
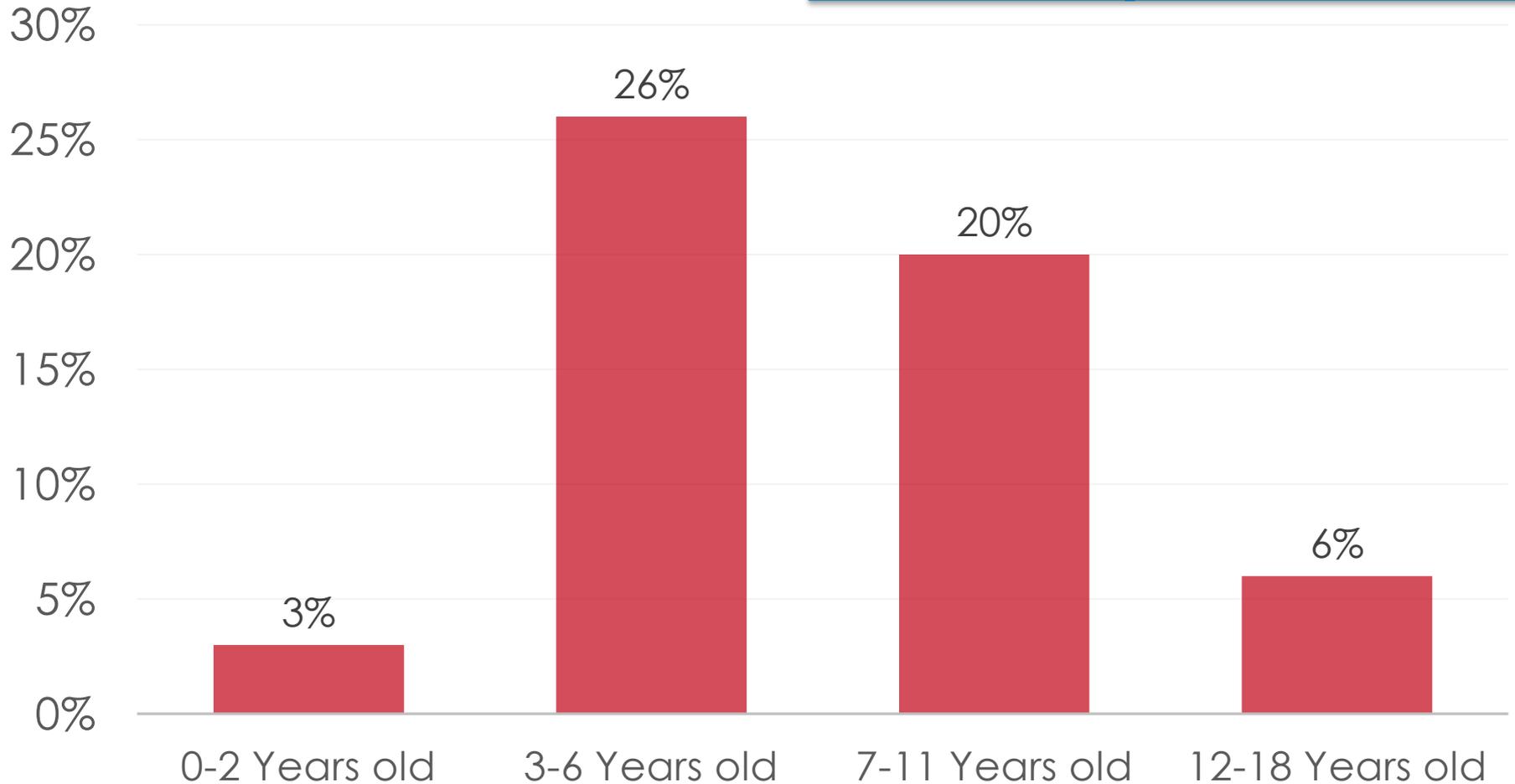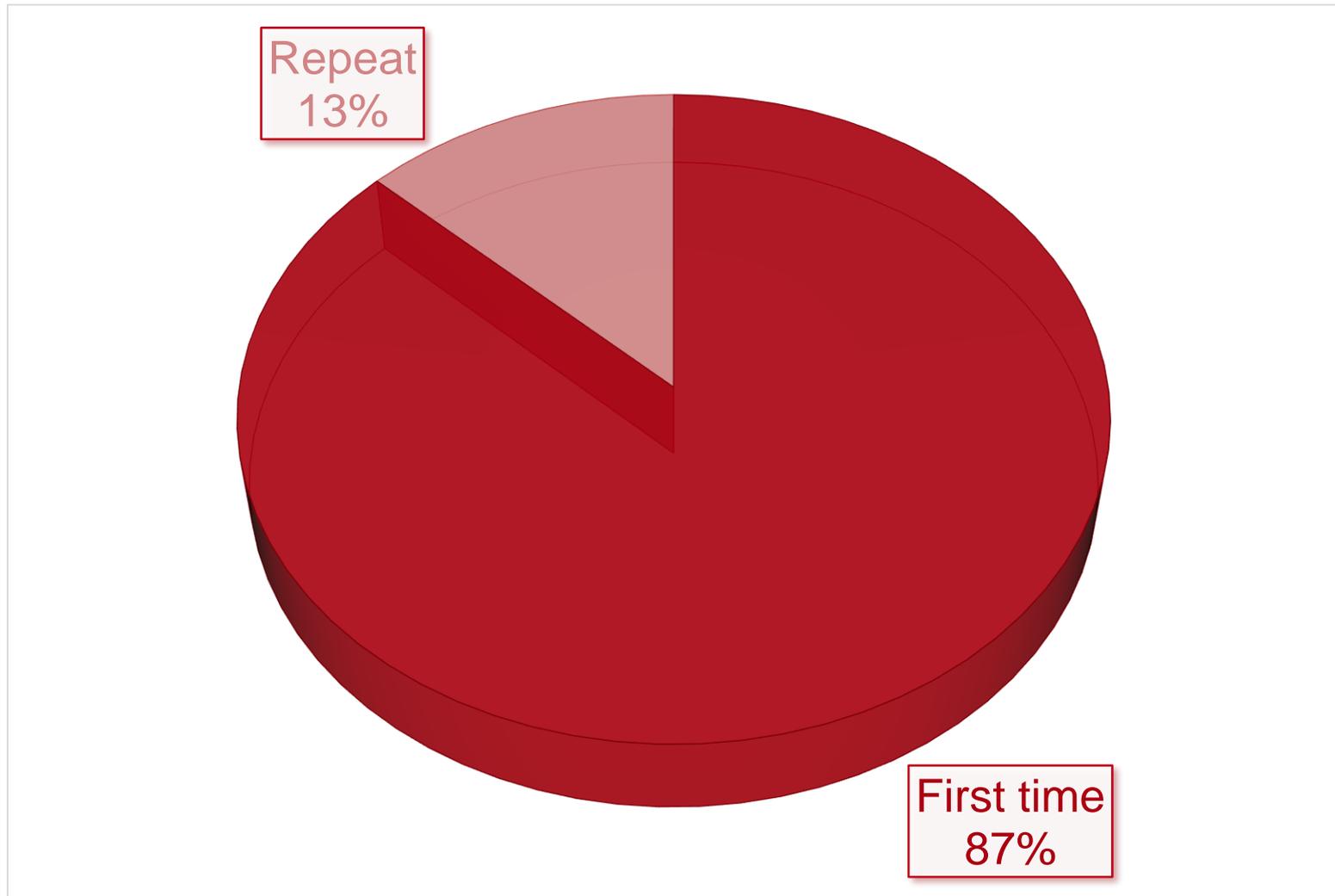
Trips to Guam – FY2017 Tracking
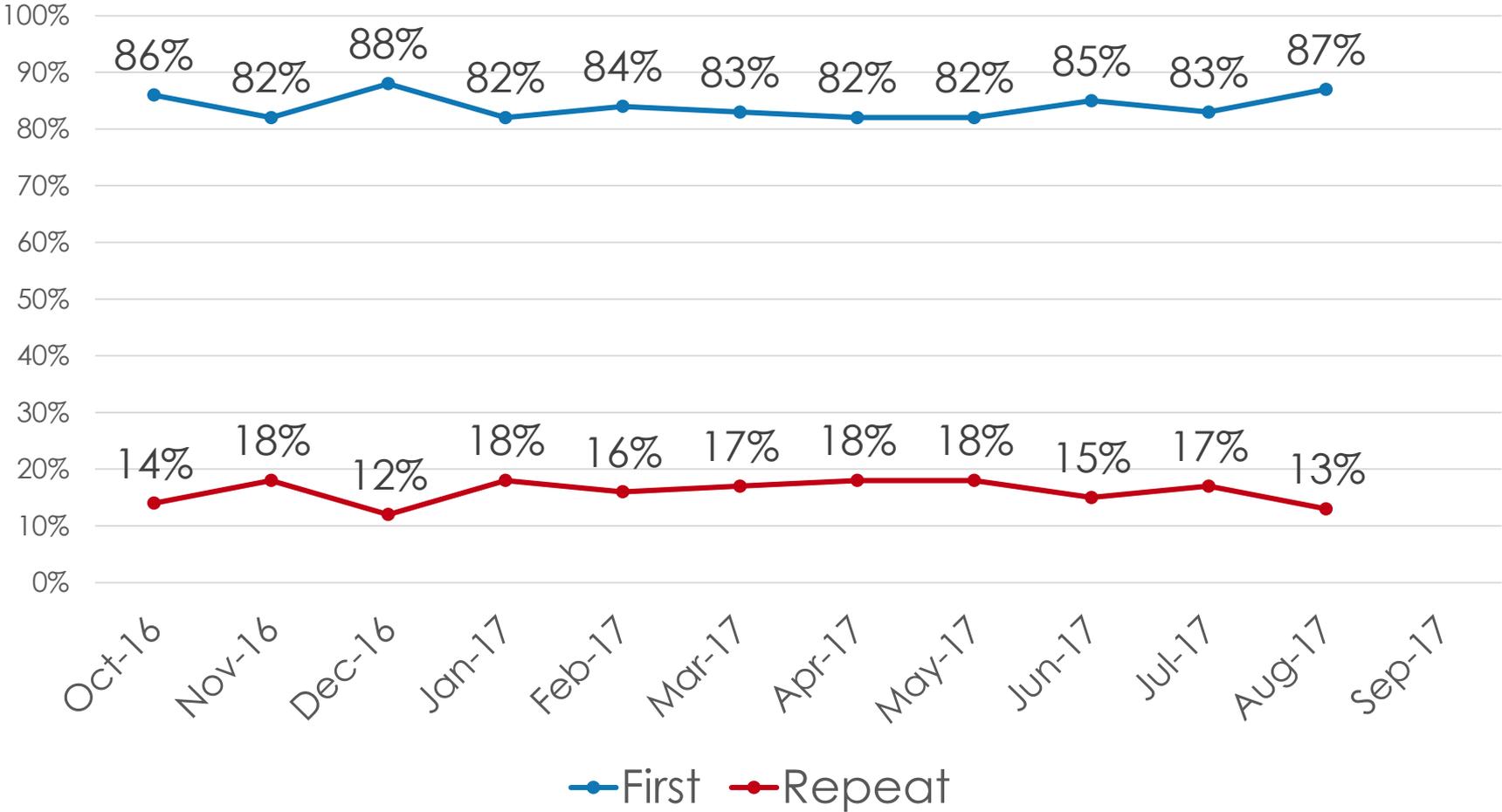
Trips to Guam – Key Segments

GVB EXIT SURVEY
Q3 Including this trip, how many times have you visited Guam?

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
Q3	1st Time	87%	100%	100%		92%	84%		85%	84%
	Repeat	13%				8%	16%	100%	15%	16%
	Total	365	3	5		206	74	49	318	133
Q3	Mean	1.17	1.00	1.00	.	1.13	1.18	2.24	1.18	1.23
	Median	1	1	1	.	1	1	2	1	1

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Length of Stay

One to two nights — (no value)
Three nights — 37%
Four or more nights — 63%

[A]
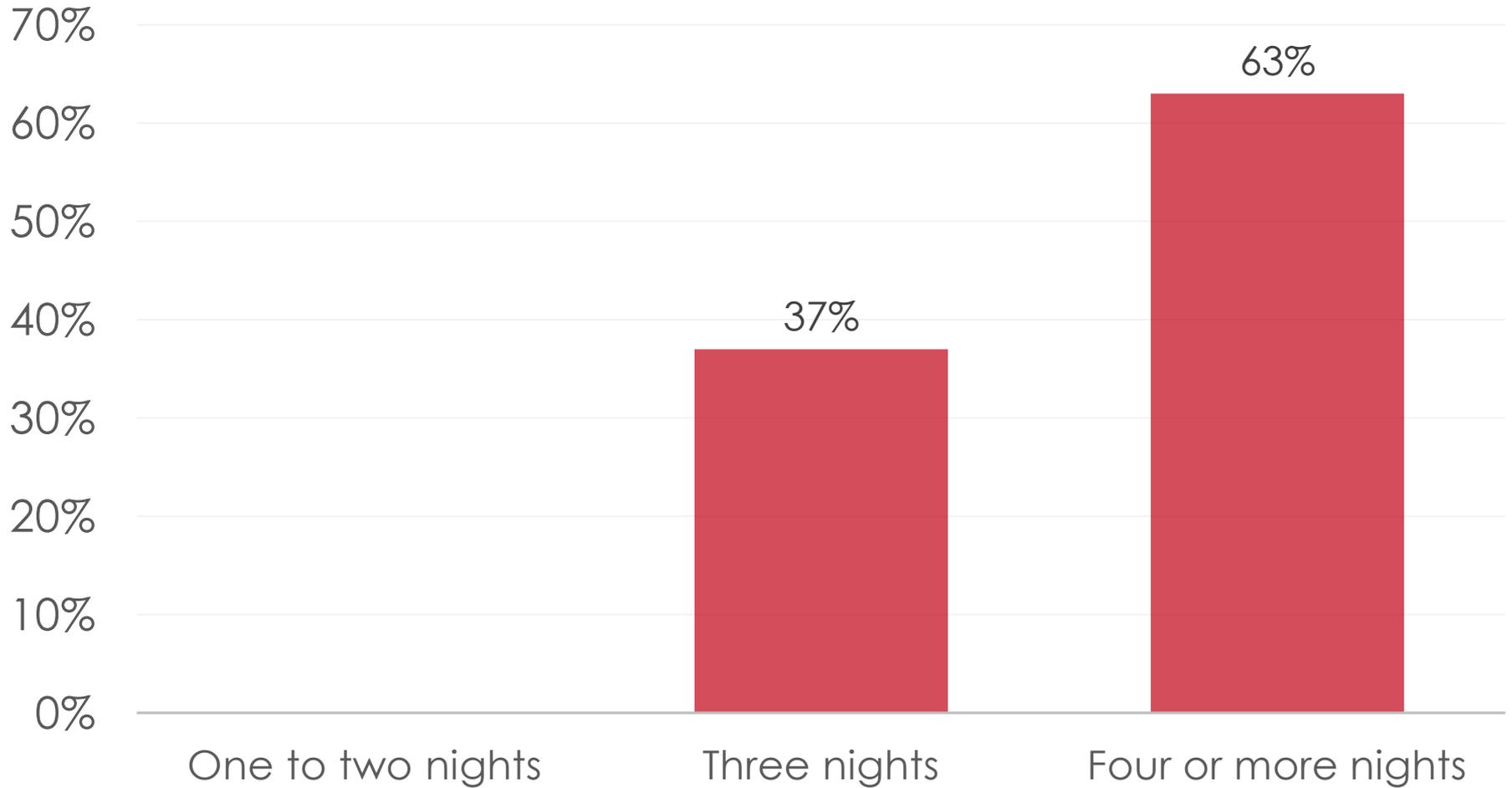
Length of Stay – FY2017 Tracking
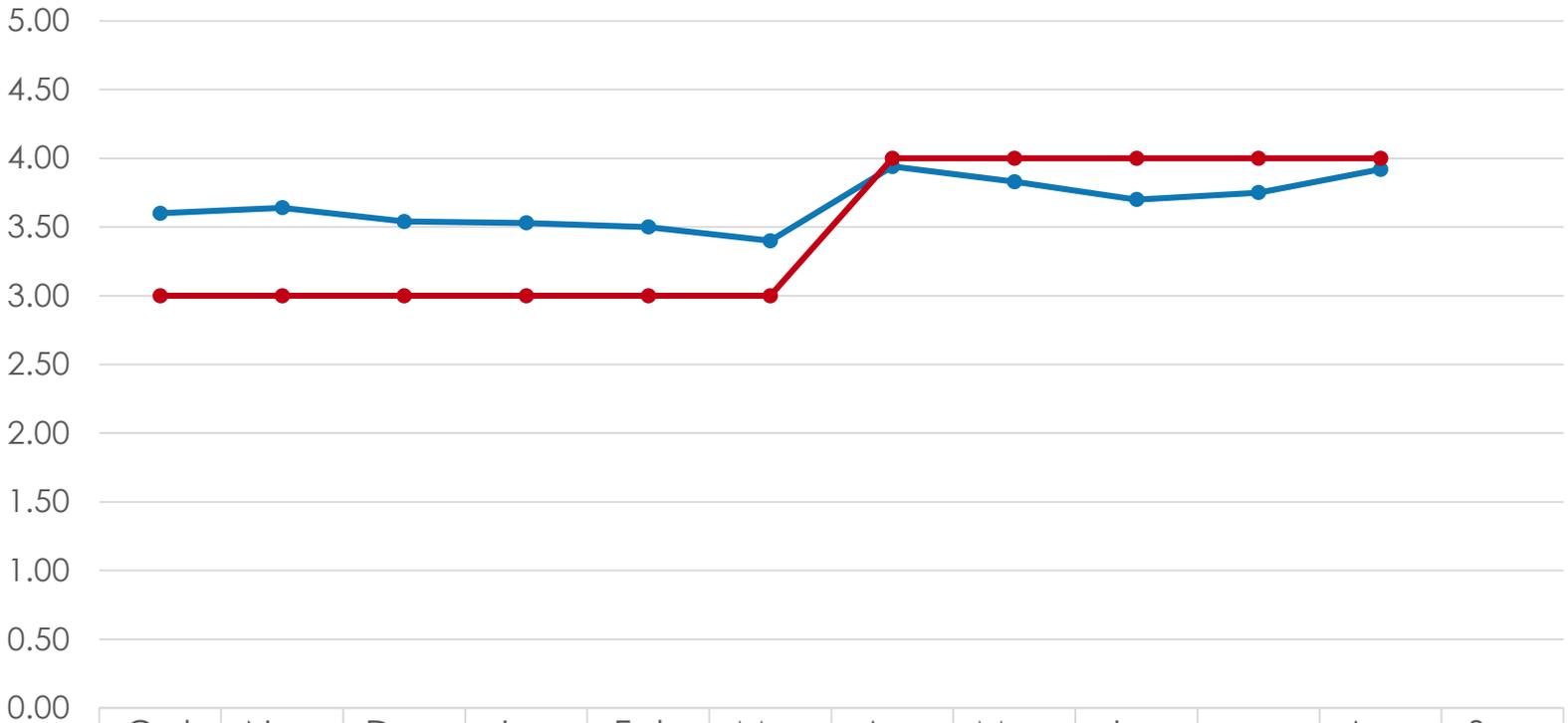
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	3.60	3.64	3.54	3.53	3.50	3.40	3.94	3.83	3.70	3.75	3.92	
MEDIAN	3	3	3	3	3	3	4	4	4	4	4	

[A]

Length of Stay – Key Segments

GVB EXIT SURVEY
SA How many nights did you stay on Guam?

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
SA	3	37%	33%			34%	54%	35%	38%	37%
	4+	63%	67%	100%		66%	46%	65%	62%	63%
	Total	365	3	5		206	74	49	318	133
SA	Mean	3.92	3.67	5.00	.	4.06	3.57	3.88	3.92	3.83
	Median	4	4	5	.	4	3	4	4	4

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[A]

Occupation – Top Responses (10%+)

[A]
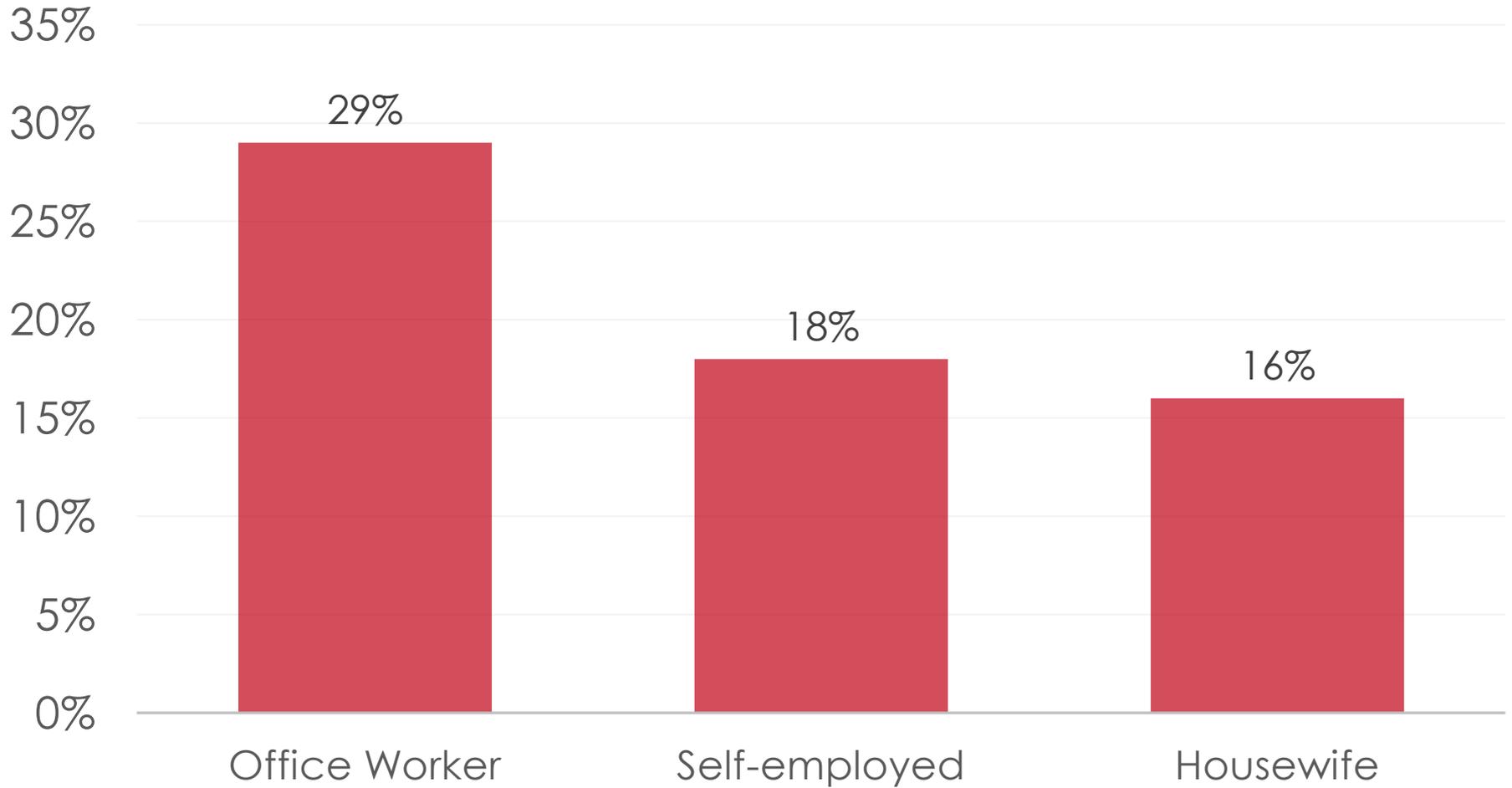
SECTION 2
TRAVEL PLANNING

[A]

Organized Group Tour

Organized
Group Tour
20%

No
80%

[A]
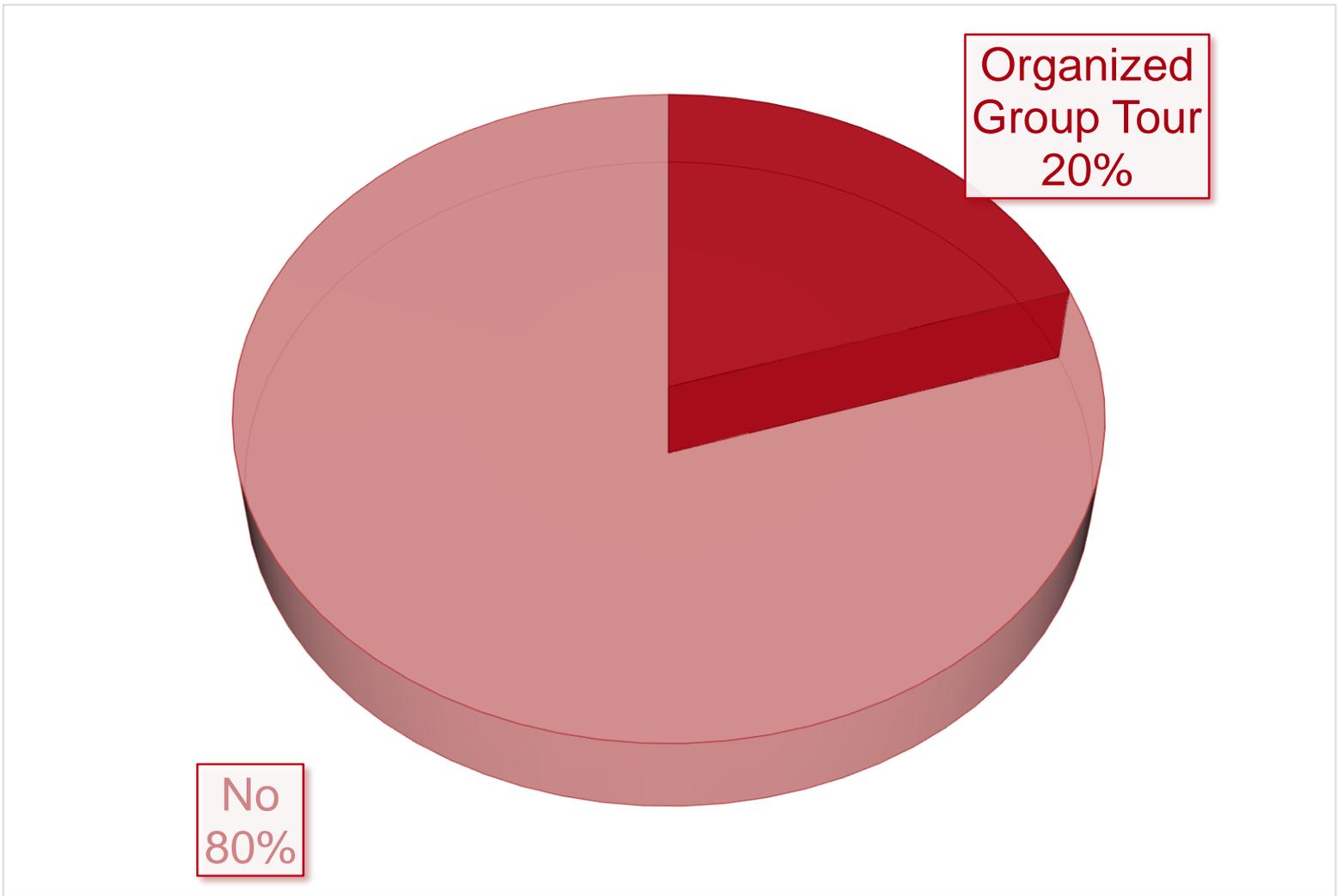
Organized Group Tour – FY2017 Tracking
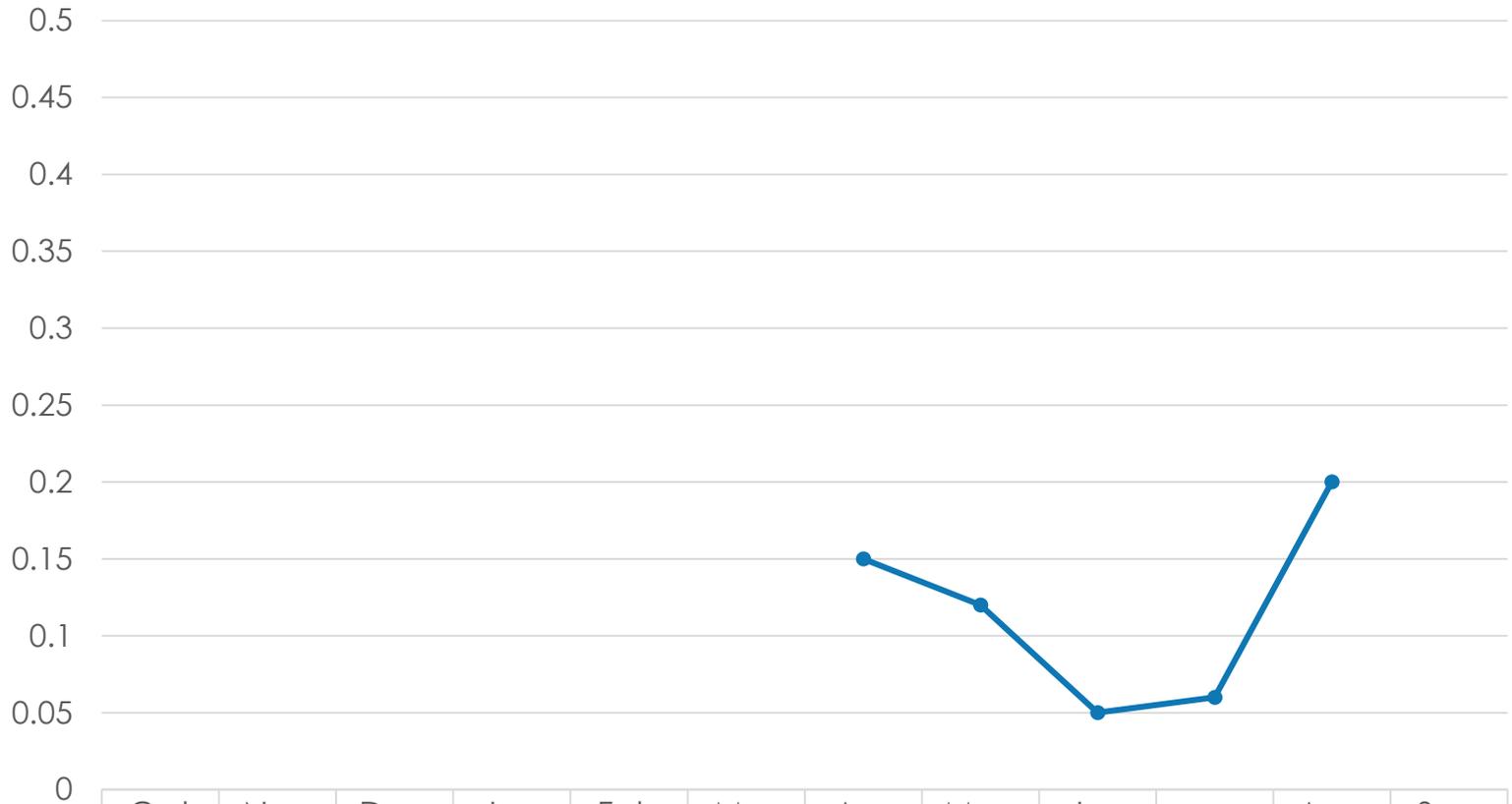
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Group Tour							15%	12%	5%	6%	20%	

[A]

Travel Arrangements - Sources

Travel Arrangements - Sources

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Online travel agent							30%	23%	21%	31%	29%	
Trvl Agt/ Co- Pkg Tour							27%	21%	31%	36%	35%	
Online 3rd Party							12%	9%	12%	6%	5%	
Direct Air/ Hotel							31%	47%	36%	26%	31%	

[A]

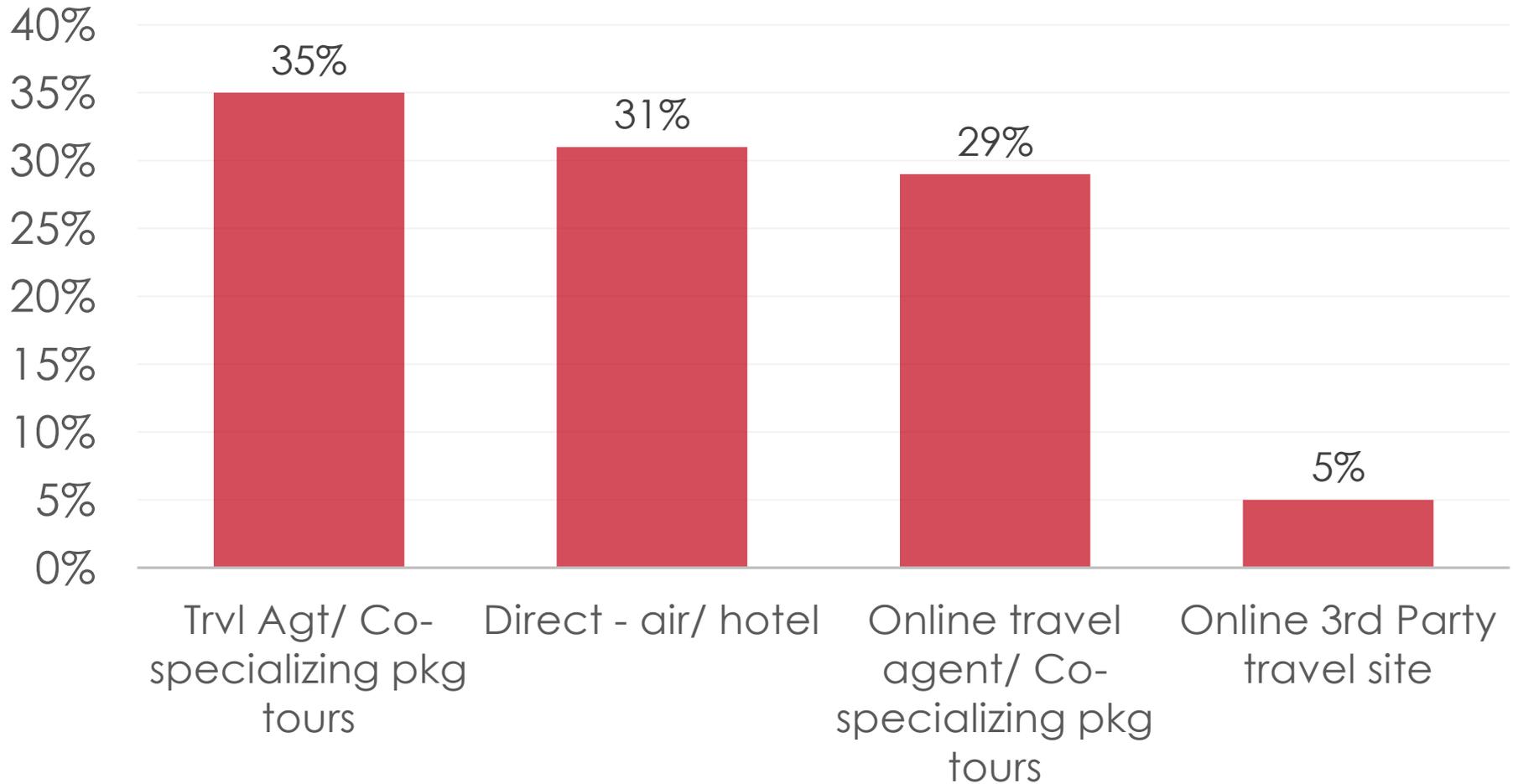# Prepaid Package Trip

No
25%

Prepaid Pkg
Trip
75%
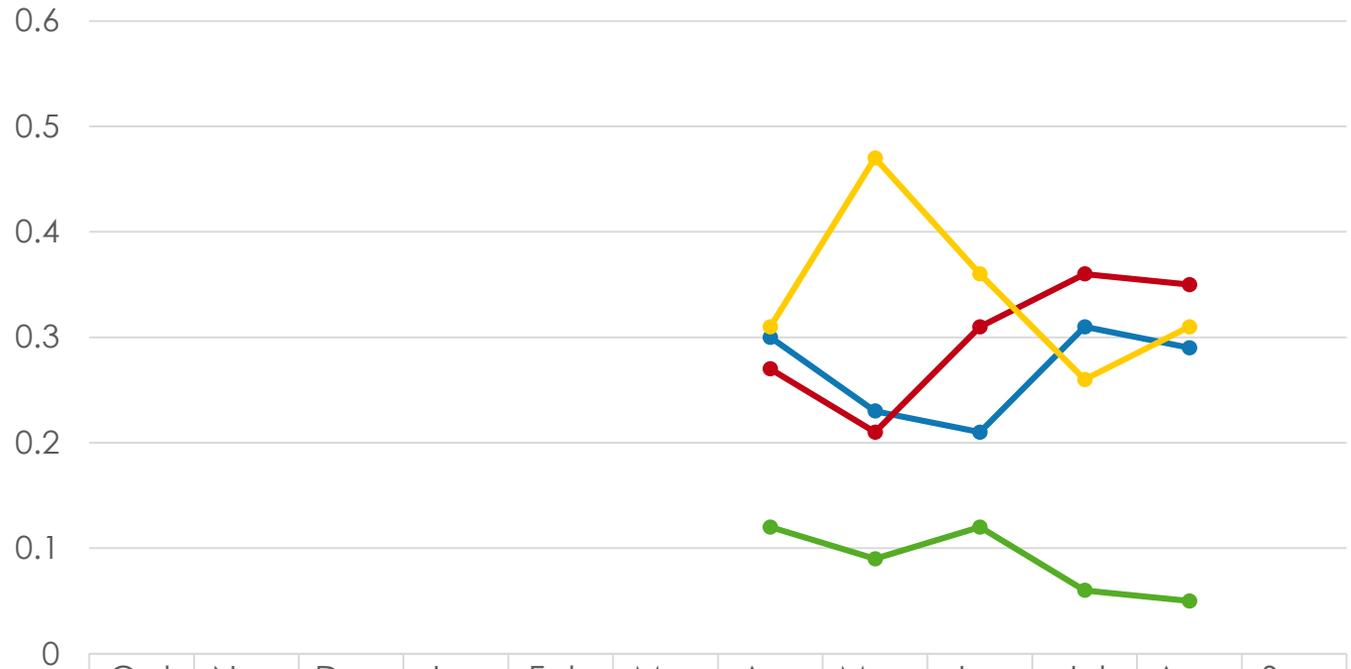
[A]
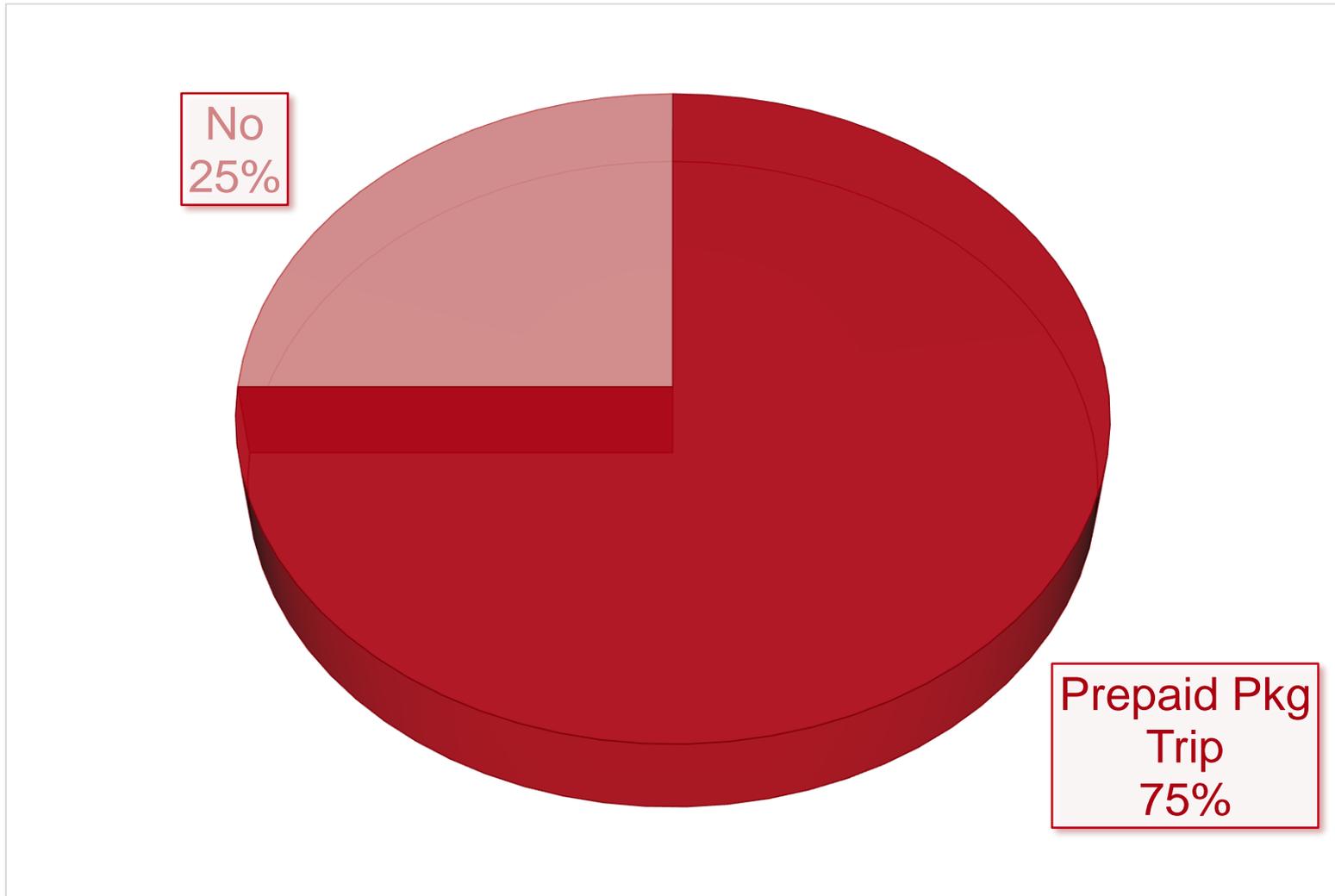
Prepaid Pkg Trip – FY2017 Tracking
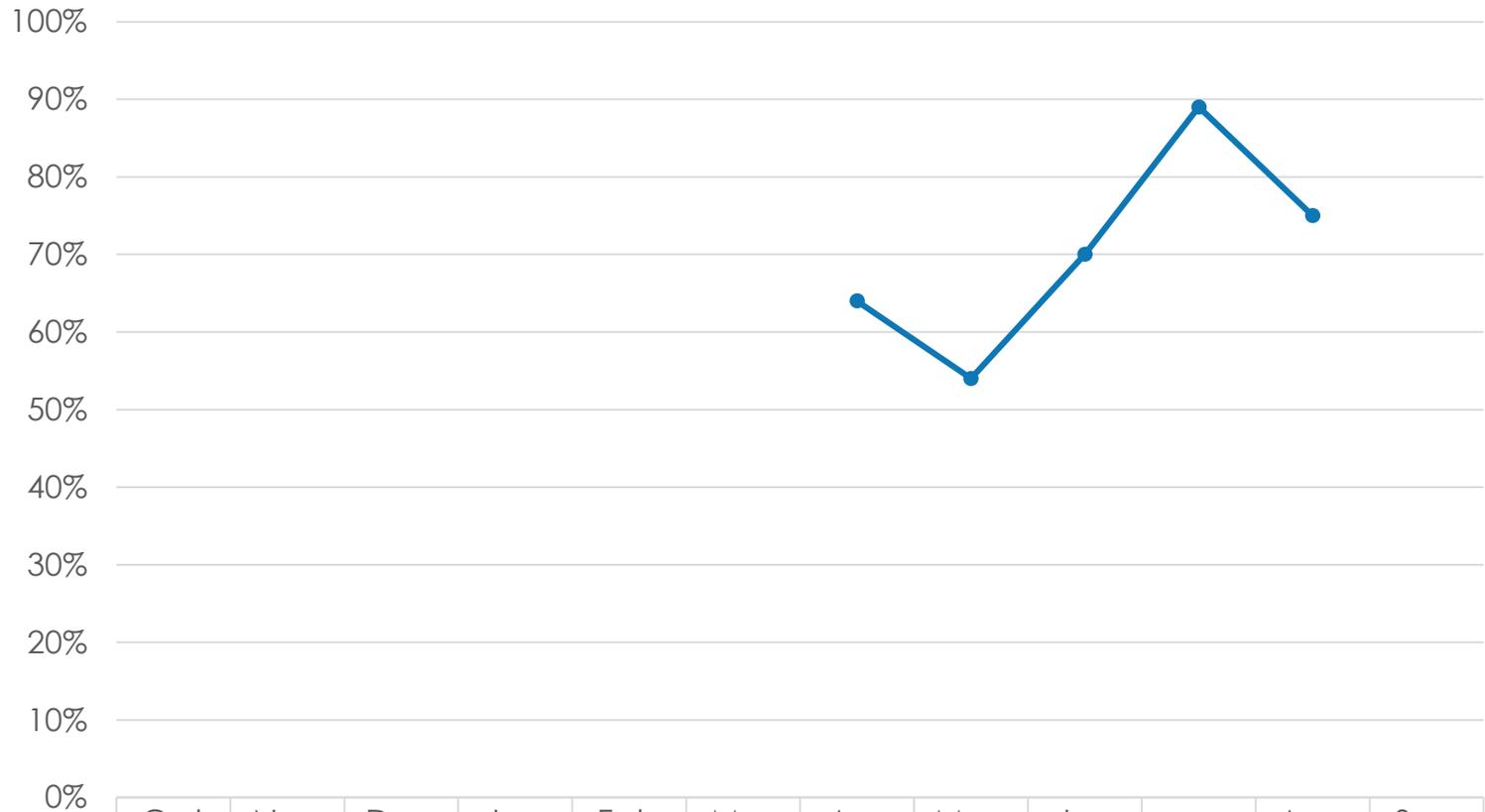
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Prepaid Pkg							64%	54%	70%	89%	75%	

[A]

Accommodations (Top Responses)

Chart data:

Accommodation	Stayed At	Length of Stay
PIC Club	17%	3.83
Pacific Star	8%	3.83
Hotel Nikko Guam	7%	4.07
Westin Resort	7%	3.81
Onward Beach Resort	7%	3.79
Holiday Resort	7%	3.63
Hilton Guam	7%	3.85
Hyatt Regency Guam	6%	3.78
Guam Reef	5%	3.71

Legend: ■ Stayed At ━●━ Length of Stay

[A]

Travel Motivation (Top Responses)

Motivation	Percentage
Safe	57%
Natural beauty	37%
Water sports	36%
Shopping	33%
Recommendation	27%
Price	22%
Relax	19%
Short Trvl time	13%
Pleasure	12%
Scuba	10%

[A]

Travel Motivation – Key Segments

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
Q5A	It is a safe place to spend a vacation	57%	33%	20%		50%	57%	37%	59%	56%
	Beautiful seas, beaches, tropical climate	37%		100%		66%	18%	22%	33%	45%
	Water sports (snorkeling, windsurfing, parasailing)	36%	33%	20%		34%	35%	18%	35%	34%
	Shopping	33%	67%			19%	50%	41%	32%	38%
	Recommendation of friend/ relative/ travel agency	27%	33%			24%	15%	22%	28%	25%
	Price of the tour package	22%				13%	30%	33%	23%	24%
	Just to relax	19%				34%	11%	6%	20%	14%
	Short travel time (not too far from home)	13%				12%	8%	4%	14%	11%
	Pleasure/ vacation	12%		60%		21%	15%	10%	11%	12%
	Scuba diving	10%				8%	19%	8%	10%	11%
	A previous visit	9%				5%	9%	67%	10%	10%
	To visit friends or relatives	7%				1%	11%	8%	8%	7%
	To golf	7%				6%	12%	10%	8%	5%
	School trip	4%				1%	5%	8%	4%	4%
	Career certification/ testing	1%				1%	3%	2%	2%	2%
	Honeymoon	1%		100%		2%			2%	
	Company/ business trip	1%	33%					2%		1%
	Convention/ conference/ trade show/ meeting	1%	67%				1%		0%	
	Organized sporting activity/ event	1%				0%			0%	1%
	Incentive trip	0%	33%				1%		0%	1%
	Government or military	0%				0%			0%	
	Adventure	0%							0%	
	Total	365	3	5		206	74	49	318	133

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SECTION 3
EXPENDITURES

[A]

Prepaid Expenditures

- $2,620.81 = overall mean average prepaid expense (for entire travel party size) by respondent

- $856.72 = overall mean average <u>per person</u> prepaid expenditures

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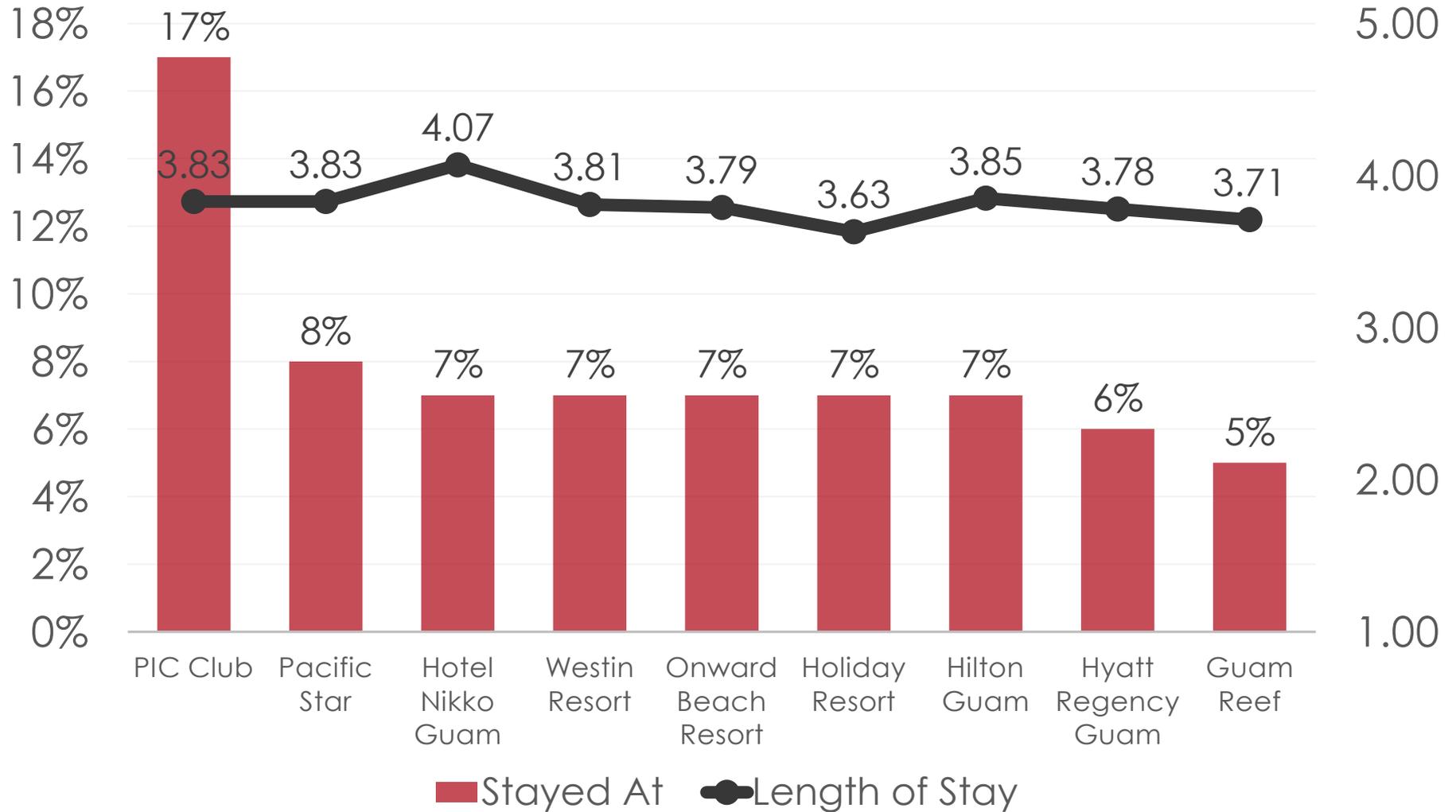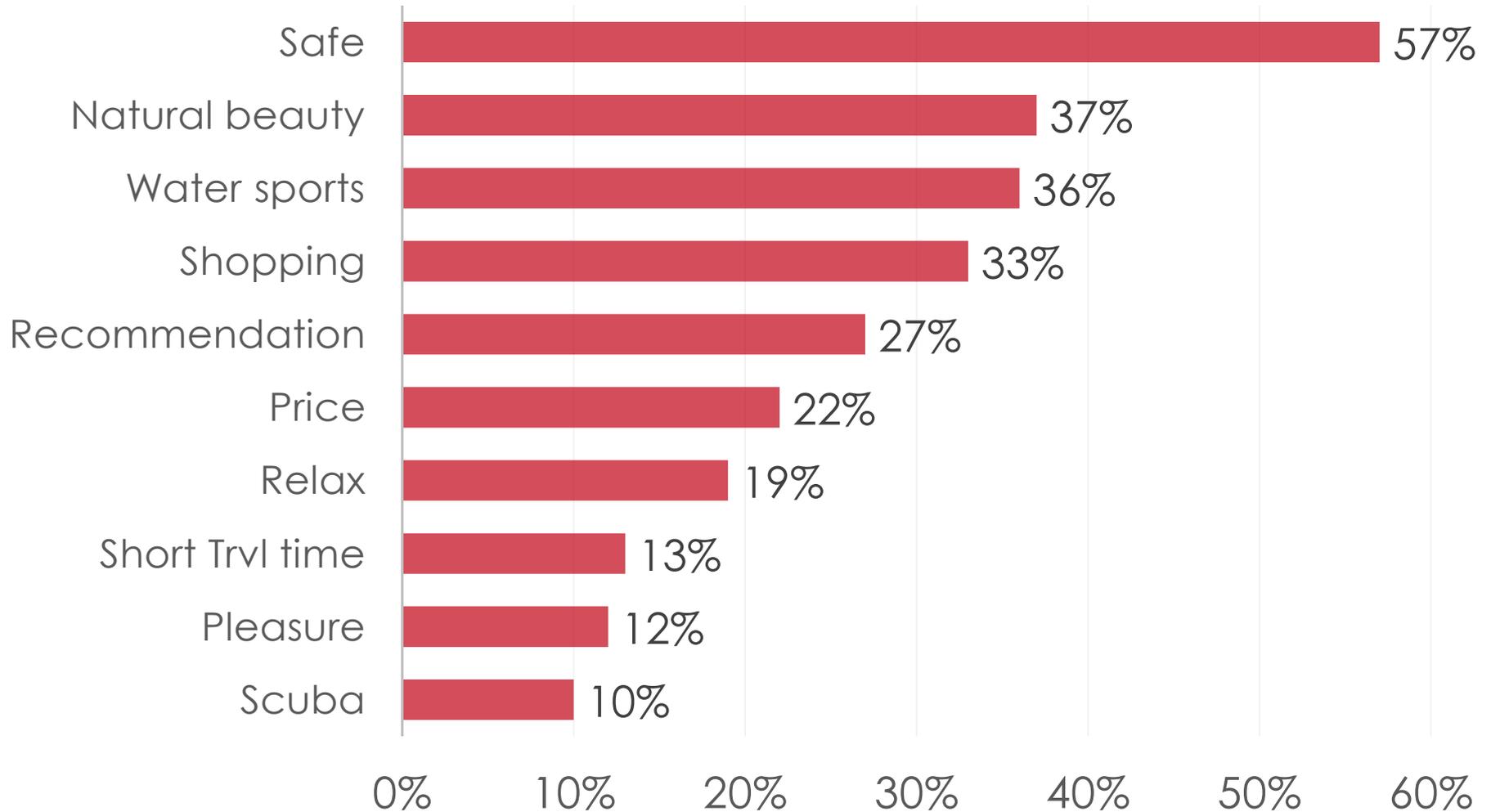# Prepaid Entire Travel Party – FY2017 Tracking
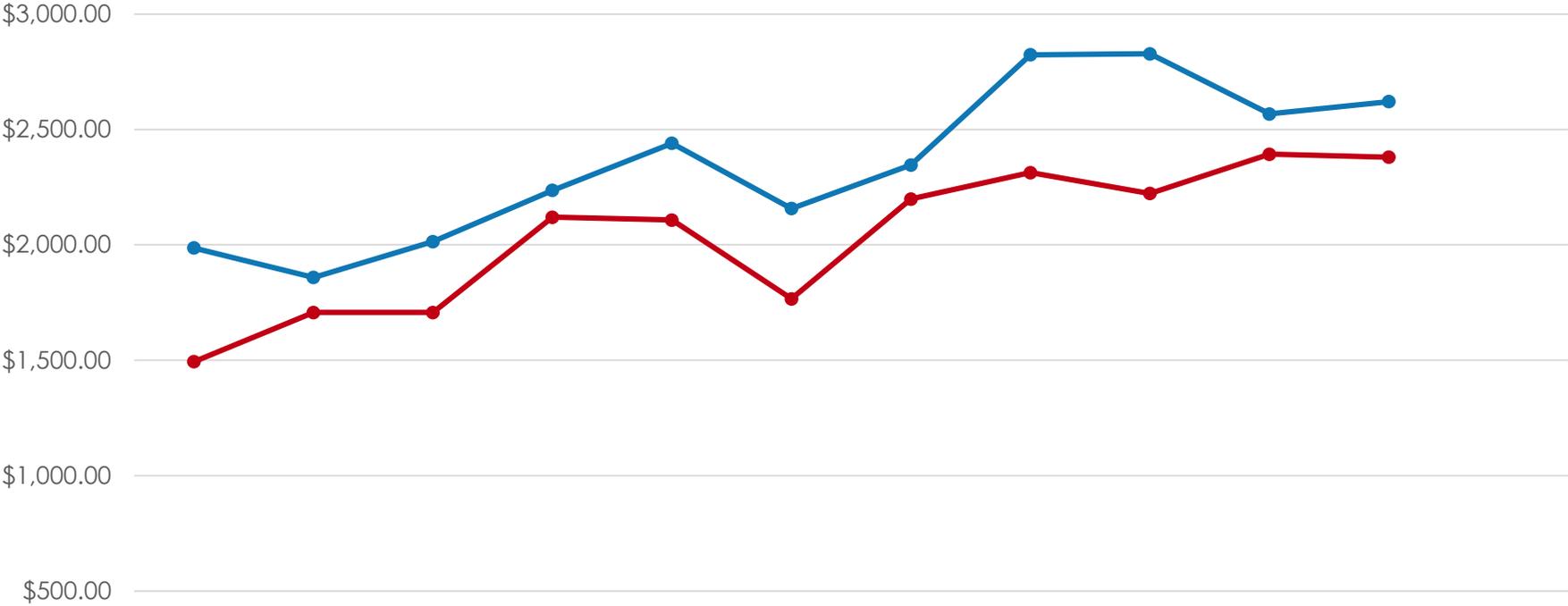
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$1,986.98	$1,858.83	$2,014.43	$2,236.01	$2,440.06	$2,157.26	$2,346.45	$2,823.65	$2,827.92	$2,567.24	$2,620.81	
MEDIAN	$1,494.00	$1,707.00	$1,707.00	$2,120.00	$2,108.00	$1,766.00	$2,199.00	$2,313.00	$2,223.00	$2,393.00	$2,380.00	

[A]

Prepaid Per Person– FY2017 Tracking

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$658.04	$720.62	$645.02	$723.26	$840.37	$721.76	$833.23	$900.01	$927.63	$878.71	$856.72	
MEDIAN	$733.00	$745.00	$691.00	$848.00	$878.00	$772.00	$885.00	$890.00	$860.00	$863.00	$764.00	

[A]
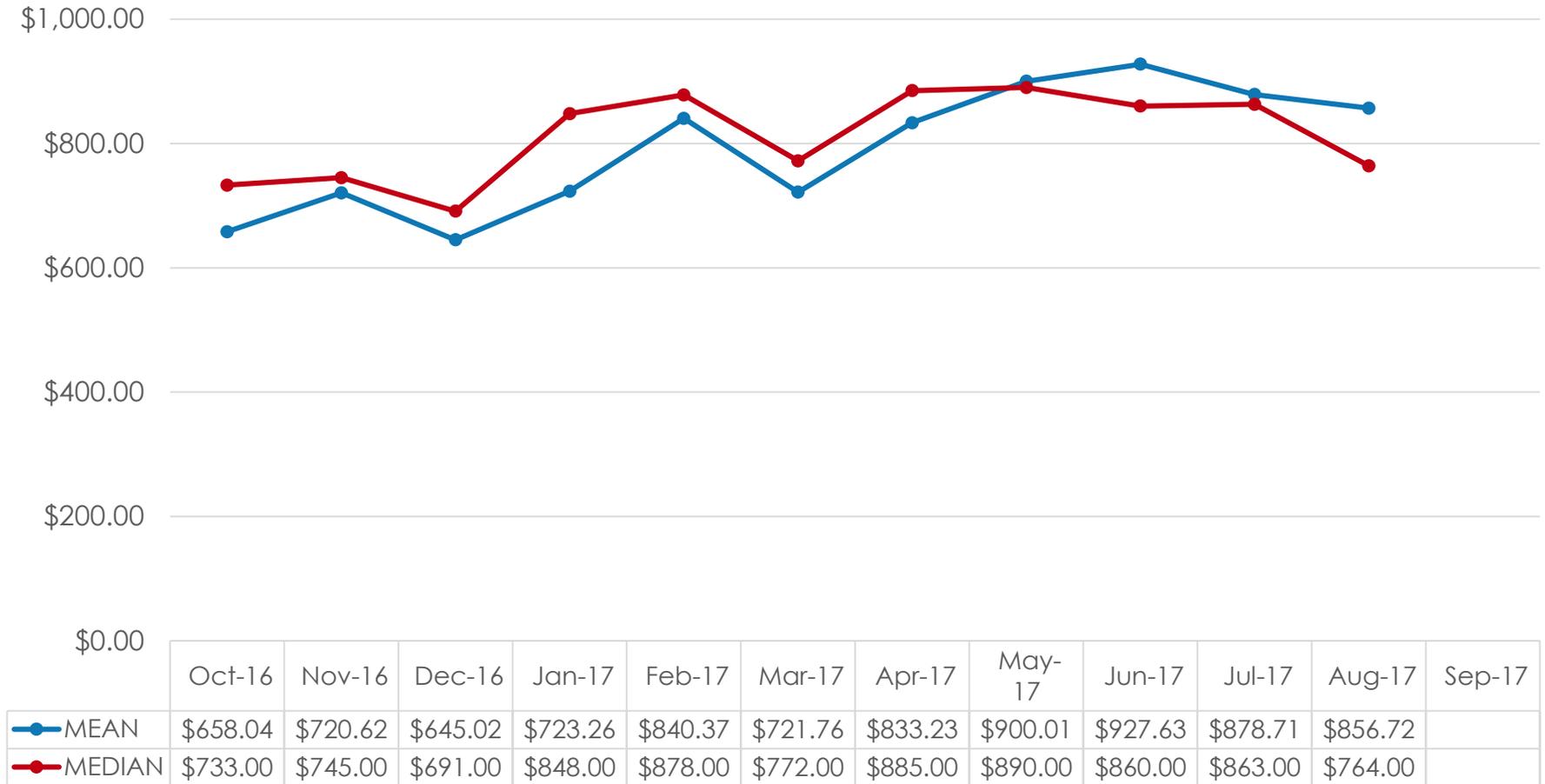
Prepaid Per Person– Key Segments

GVB EXIT SURVEY
Q10A PREPAID - PER PERSON:

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
PREPAID PP	Mean	$856.72	$428.54	$1,392.89	.	$894.27	$806.32	$754.41	$845.63	$827.14
	Median	$764	$551	$1,411	.	$808	$749	$735	$764	$735

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Prepaid Expenses by Category – MEAN Entire Travel Party
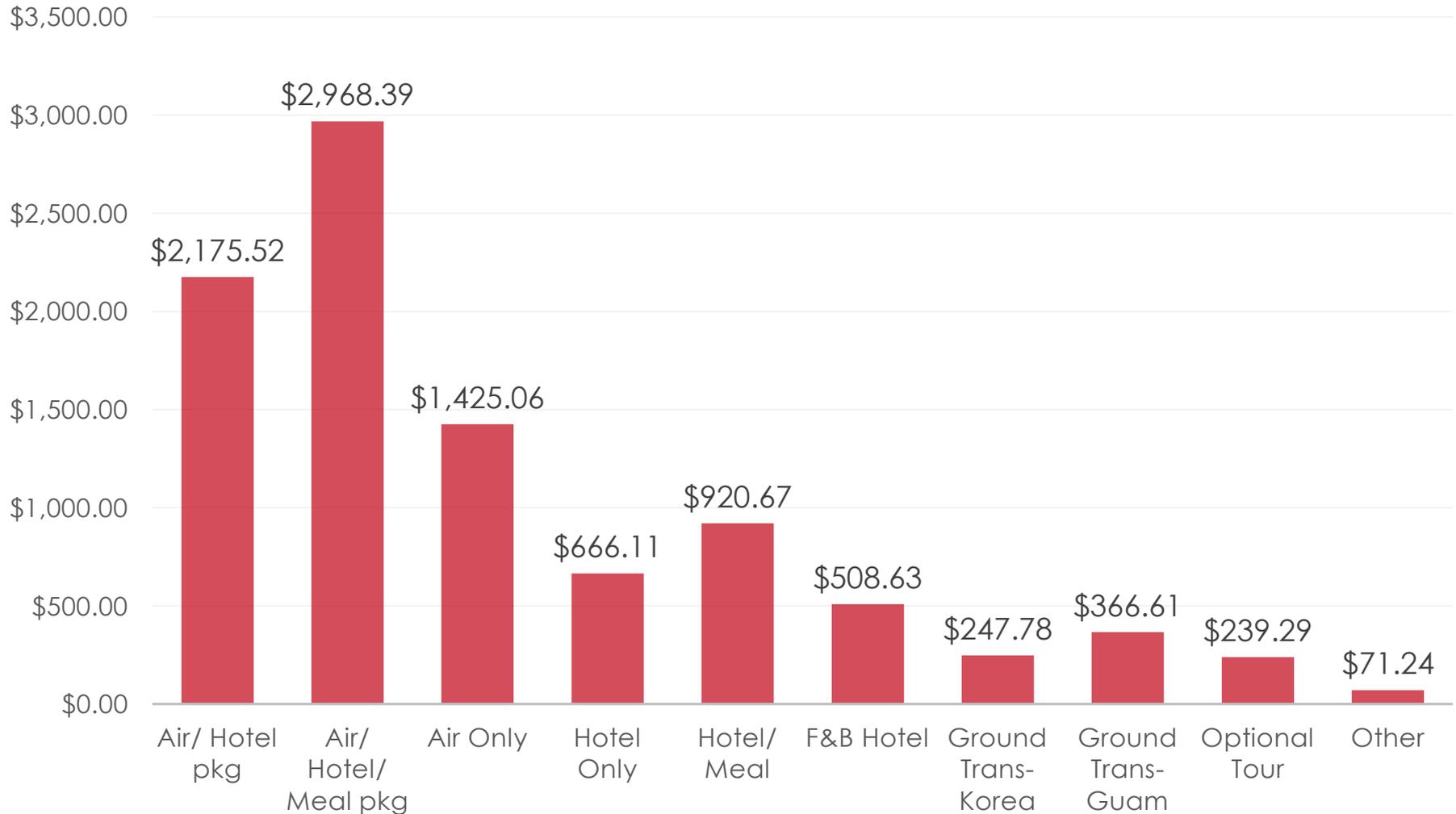
Prepaid– FY2017 Tracking
Airfare & Accommodation Packages
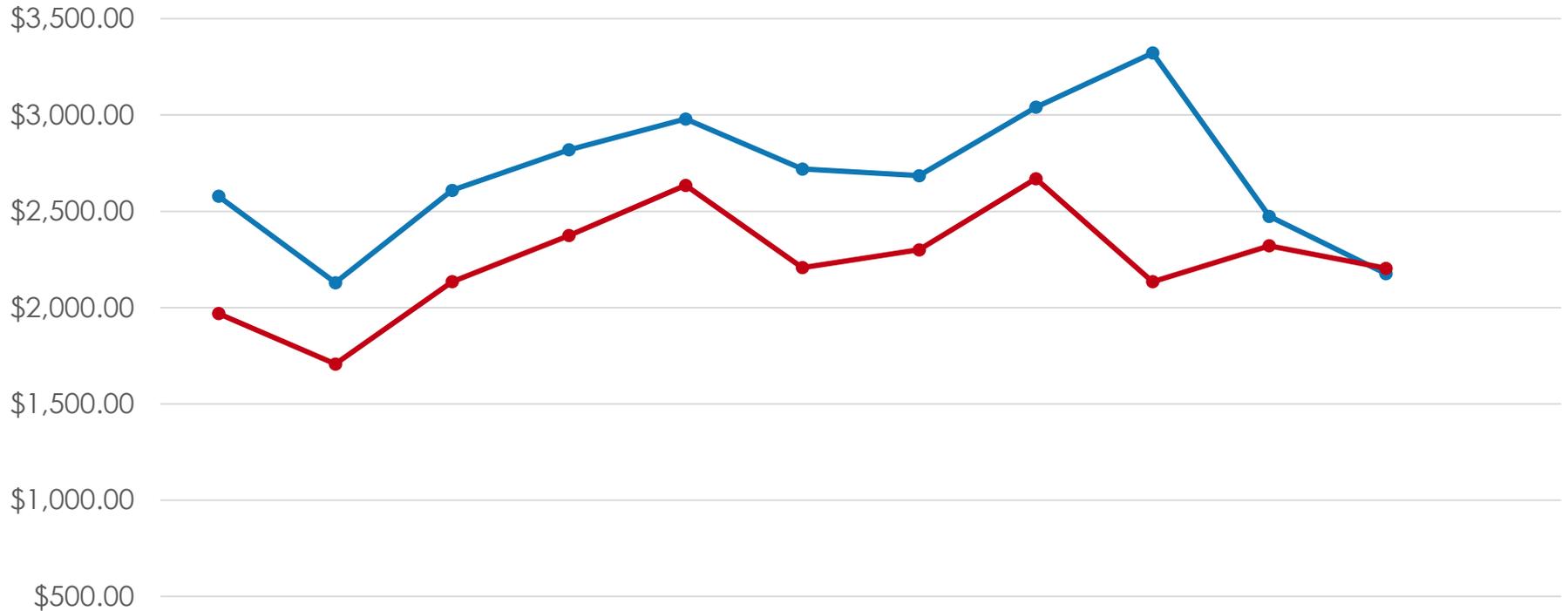
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$2,578.15	$2,128.73	$2,608.73	$2,819.60	$2,979.70	$2,719.39	$2,684.99	$3,040.24	$3,322.35	$2,473.86	$2,175.52	
MEDIAN	$1,969.00	$1,707.00	$2,134.00	$2,374.00	$2,635.00	$2,207.00	$2,300.00	$2,669.00	$2,134.00	$2,321.00	$2,204.00	

[A]

Prepaid– FY2017 Tracking
Airfare & Accommodation W/ Meal Packages

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$2,995.82	$2,671.84	$2,829.30	$3,234.87	$3,140.40	$2,897.03	$2,700.32	$2,937.05	$4,230.29	$3,040.50	$2,968.39	
MEDIAN	$2,637.00	$2,560.00	$2,390.00	$2,866.00	$2,635.00	$2,649.00	$2,477.00	$2,669.00	$2,846.00	$2,679.00	$2,557.00	

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Prepaid– FY2017 Tracking
Airfare Only
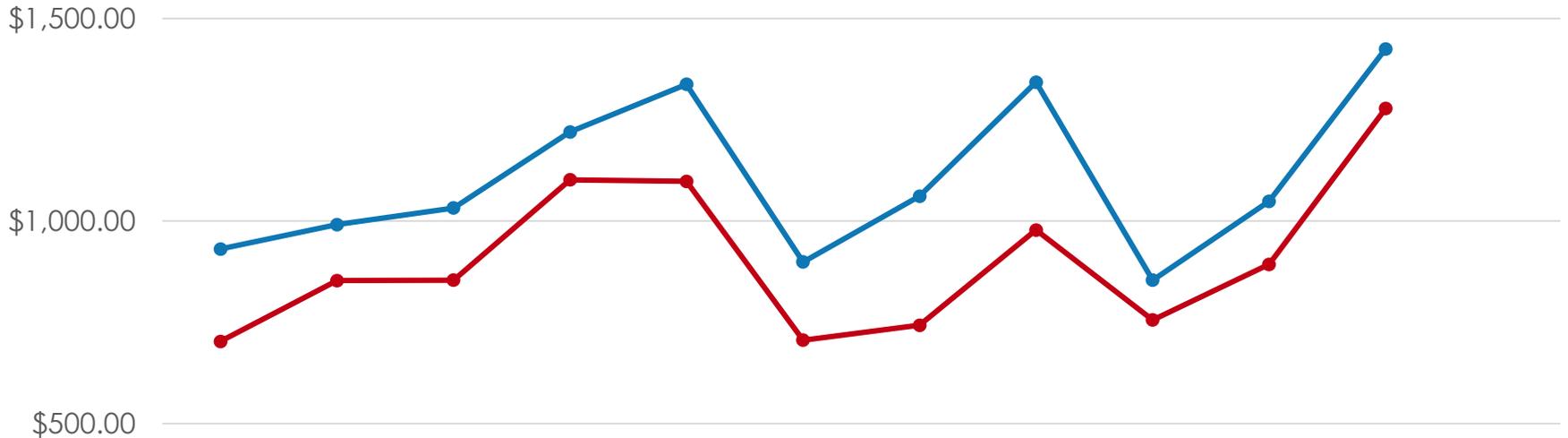
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$930.99	$991.20	$1,032.22	$1,220.24	$1,337.74	$899.01	$1,061.69	$1,342.90	$854.20	$1,048.76	$1,425.06	
MEDIAN	$703.00	$853.00	$854.00	$1,102.00	$1,098.00	$706.00	$743.00	$978.00	$756.00	$893.00	$1,278.00	

Prepaid– FY2017 Tracking
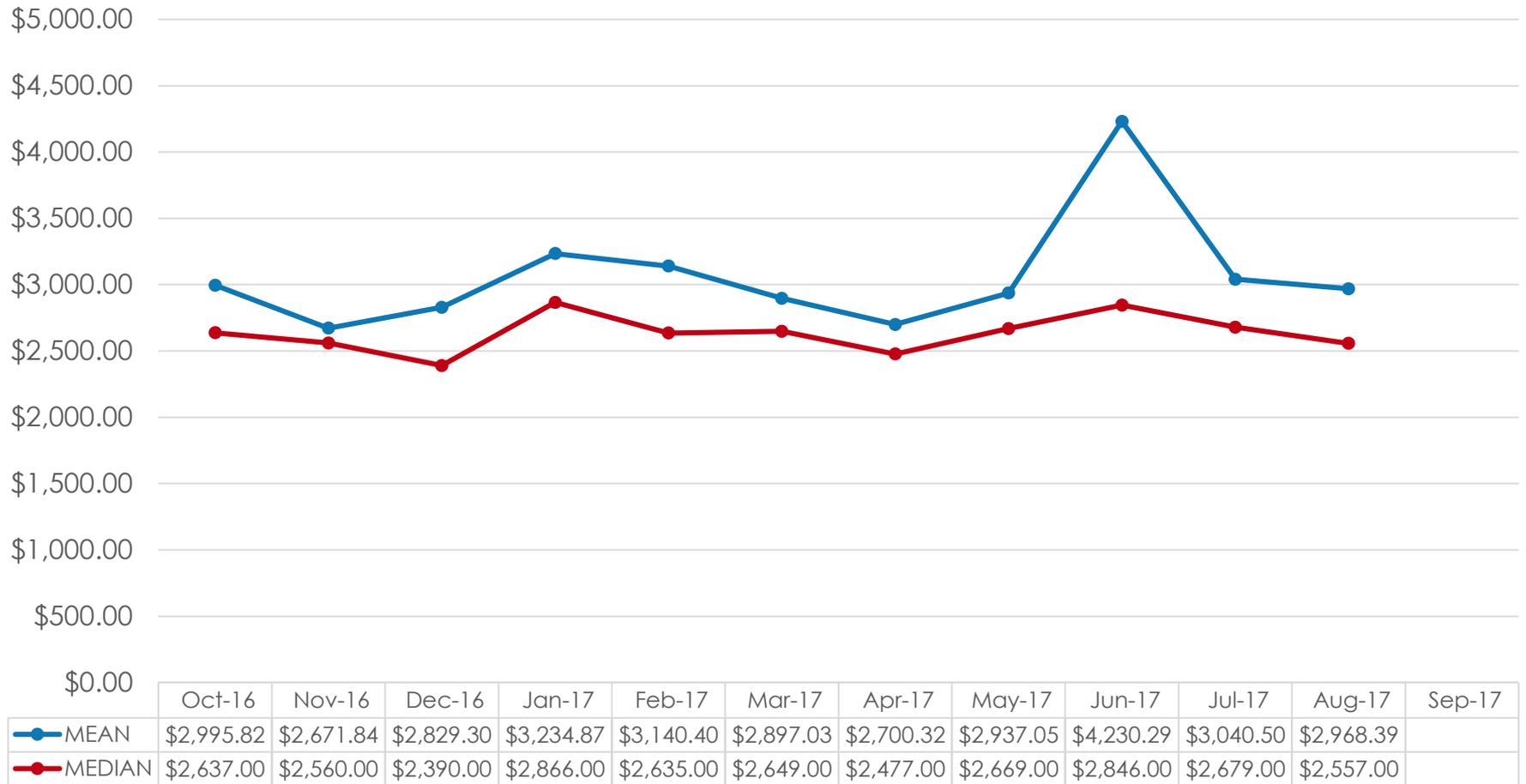## Accommodations Only

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$686.81	$974.76	$1,142.28	$951.10	$1,257.38	$978.59	$980.77	$1,204.05	$804.84	$789.04	$666.11	
MEDIAN	$545.00	$819.00	$854.00	$848.00	$1,054.00	$883.00	$885.00	$890.00	$711.00	$714.00	$573.00	

[A]

Prepaid– FY2017 Tracking
Accommodations w/ Meal Only

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$799.92	$901.21	$990.32	$1,006.7	$1,037.9	$707.17	$1,699.8	$1,228.7	$1,197.2	$989.04	$920.67	
MEDIAN	$879.00	$853.00	$768.00	$975.00	$878.00	$662.00	$1,040.0	$934.00	$1,089.0	$893.00	$793.00	

[A]

Prepaid– FY2017 Tracking
Food & Beverage in Hotel
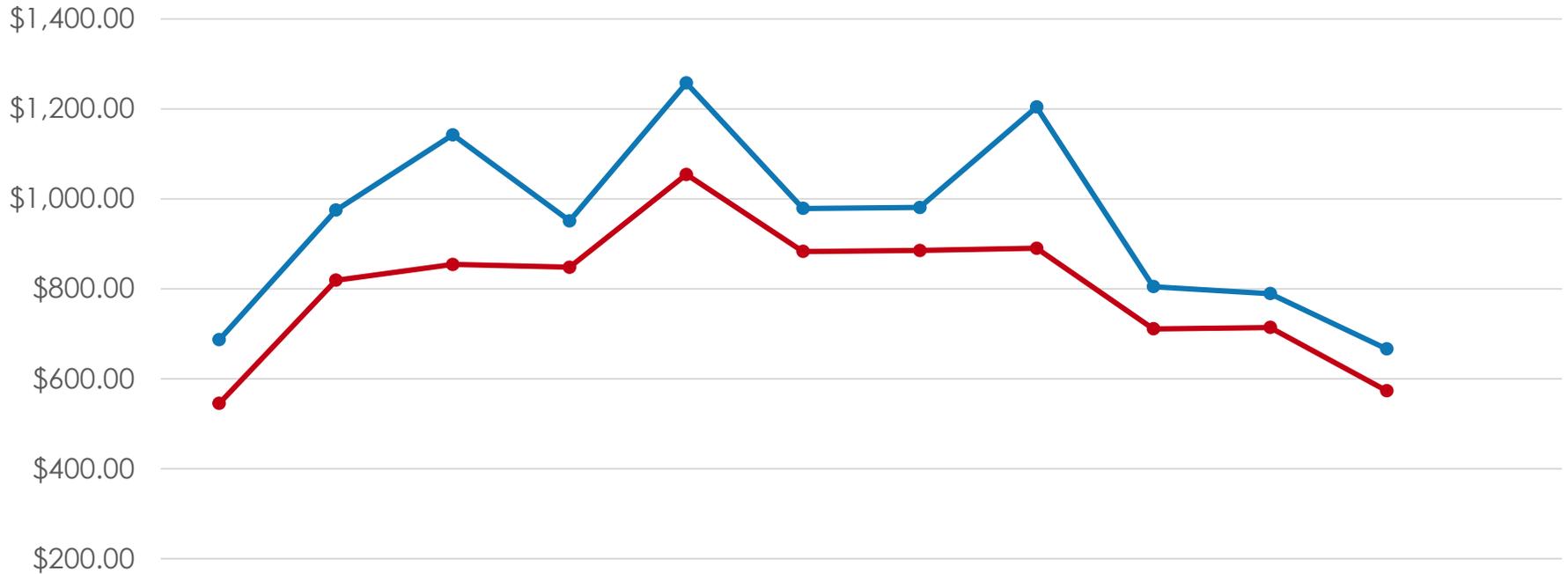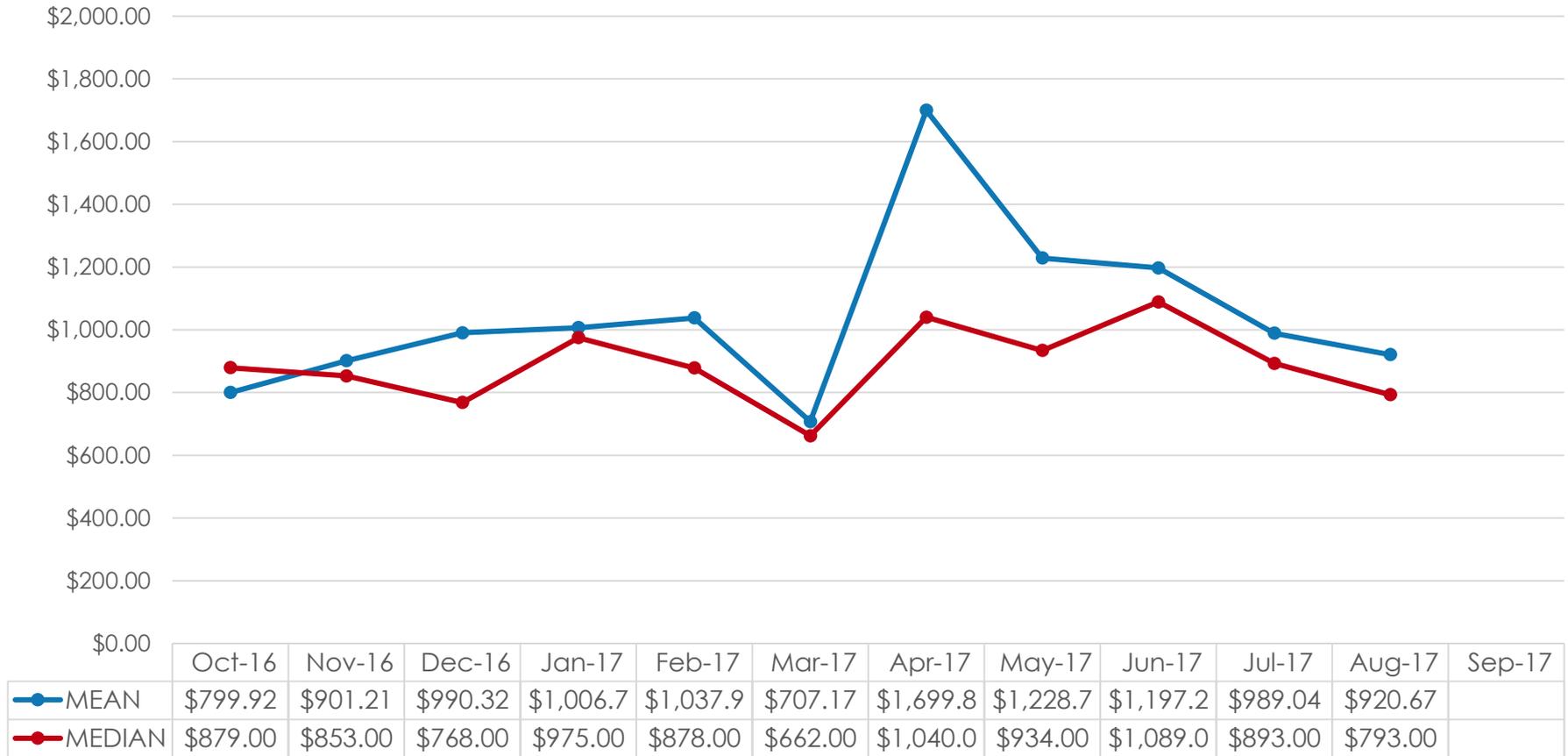

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$791.13	$426.71	$847.81		$219.56	$123.60	$192.11	$167.04	$189.10	$99.33	$508.63	
MEDIAN	$791.00	$427.00	$848.00		$220.00	$124.00	$88.00	$133.00	$89.00	$49.00	$264.00	

[A]

Prepaid– FY2017 Tracking
Ground Transportation - Korea

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$81.02	$53.95	$56.26	$172.95	$80.59	$51.41	$61.29	$85.51	$65.54	$69.33	$247.78	
MEDIAN	$44.00	$43.00	$51.00	$85.00	$44.00	$22.00	$44.00	$67.00	$44.00	$45.00	$53.00	

[A]

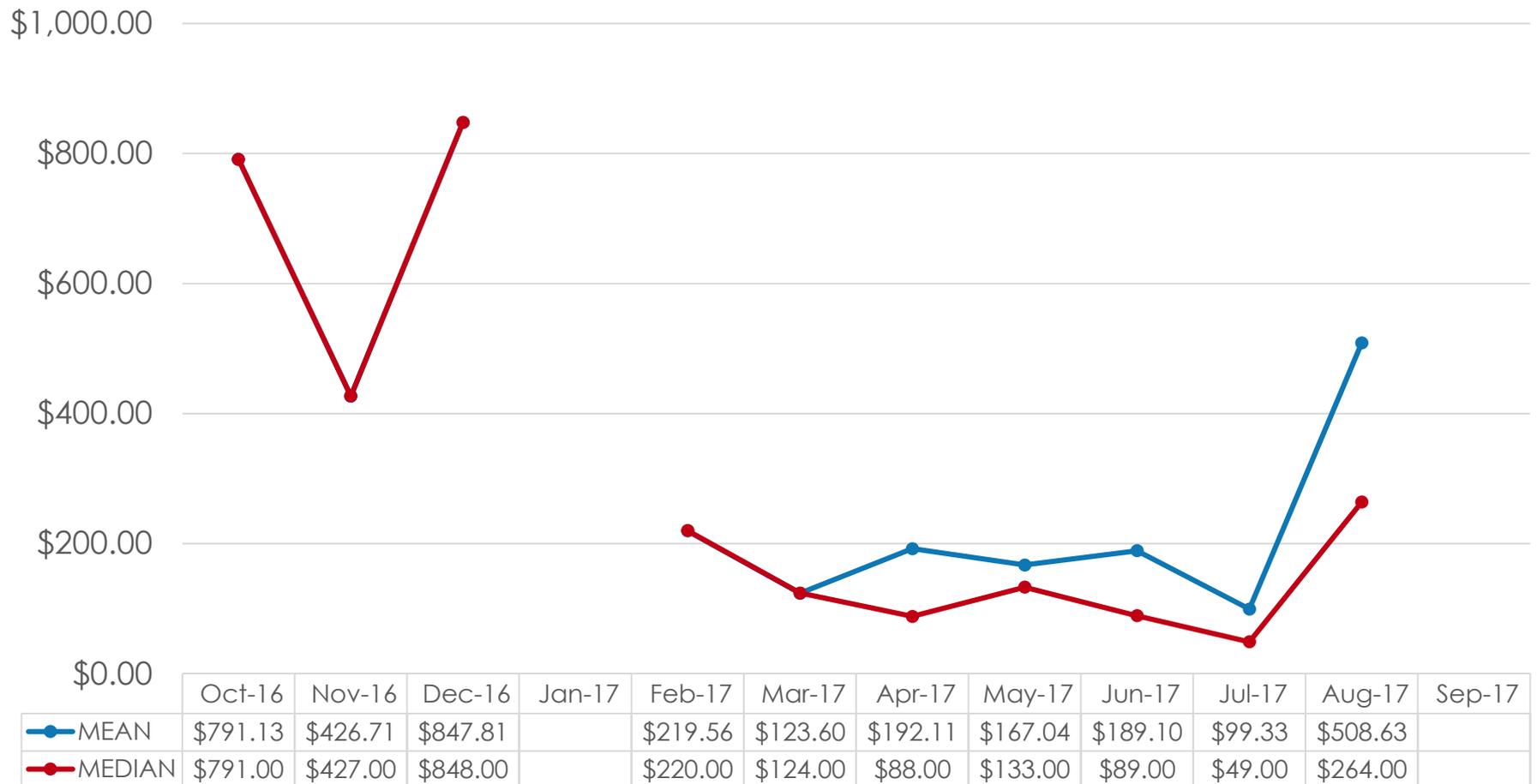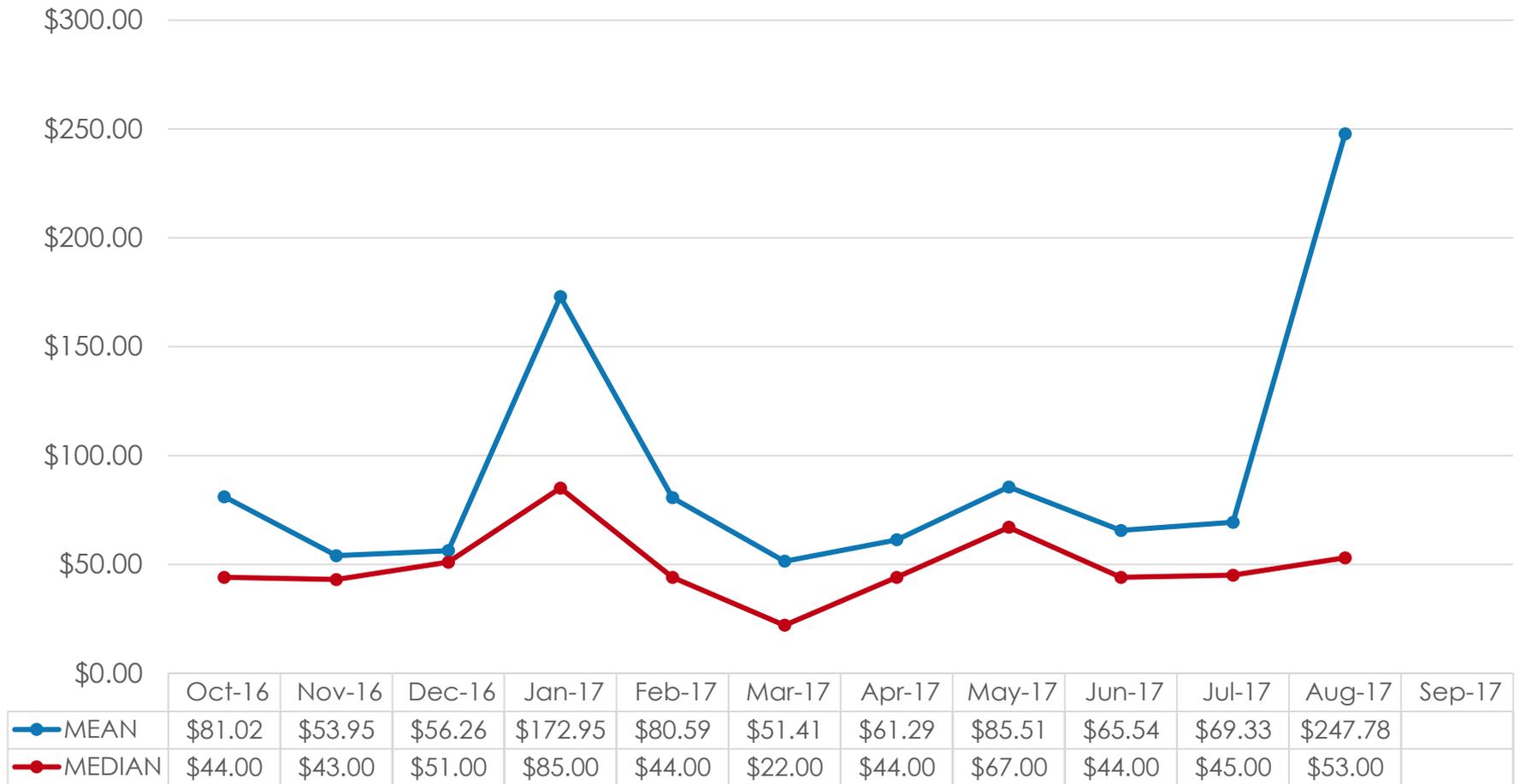# Prepaid– FY2017 Tracking
Ground Transportation - Guam
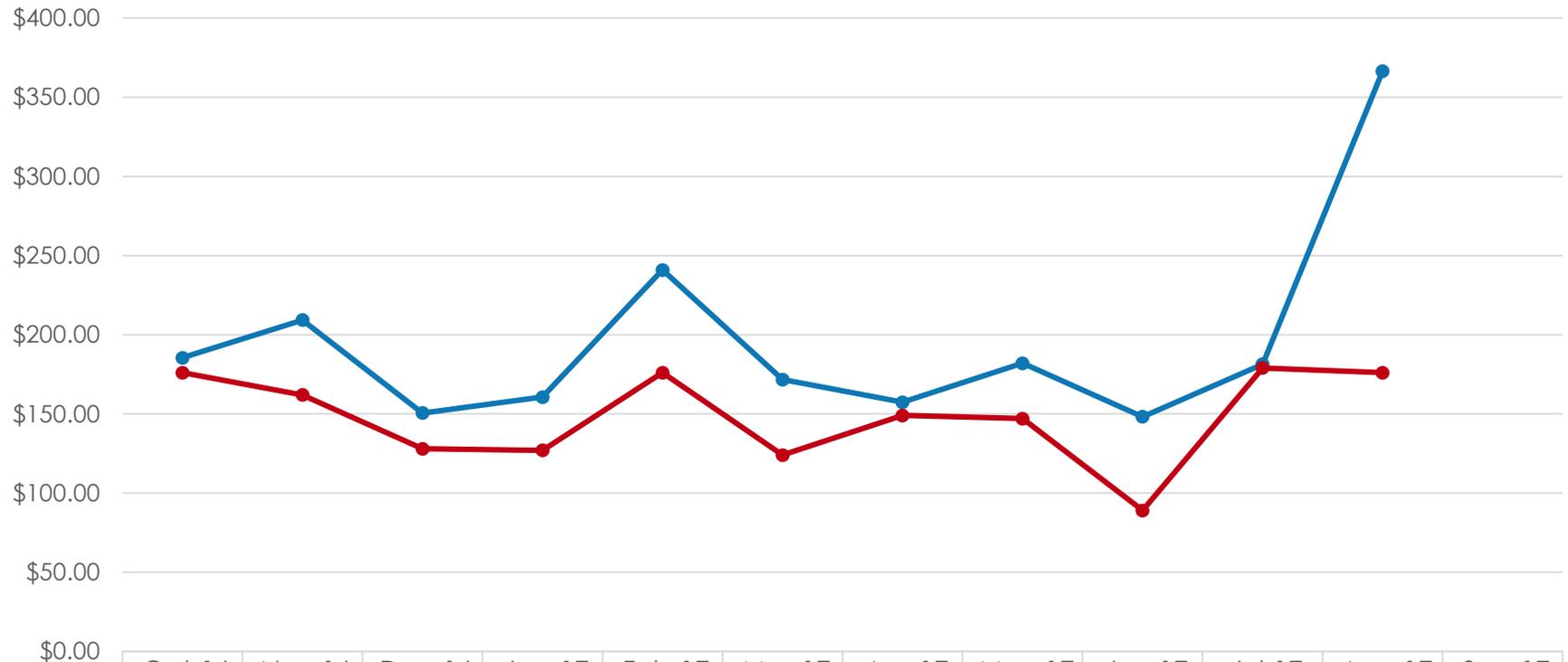
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$185.47	$209.35	$150.57	$160.59	$240.98	$171.69	$157.41	$181.98	$148.24	$181.40	$366.61	
MEDIAN	$176.00	$162.00	$128.00	$127.00	$176.00	$124.00	$149.00	$147.00	$89.00	$179.00	$176.00	

[A]

Prepaid– FY2017 Tracking
Optional tours/ Activities

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$394.68	$444.49	$370.79	$249.85	$286.33	$336.64	$382.43	$265.87	$274.04	$270.61	$239.29	
MEDIAN	$242.00	$256.00	$256.00	$170.00	$263.00	$177.00	$265.00	$205.00	$178.00	$268.00	$264.00	

[A]

On-Island Expenditures

- $730.58 = overall mean average prepaid expense (for entire travel party size) by respondent

- $274.14 = overall mean average <u>per person</u> prepaid expenditures

[A]

On-Island Entire Travel Party – FY2017 Tracking
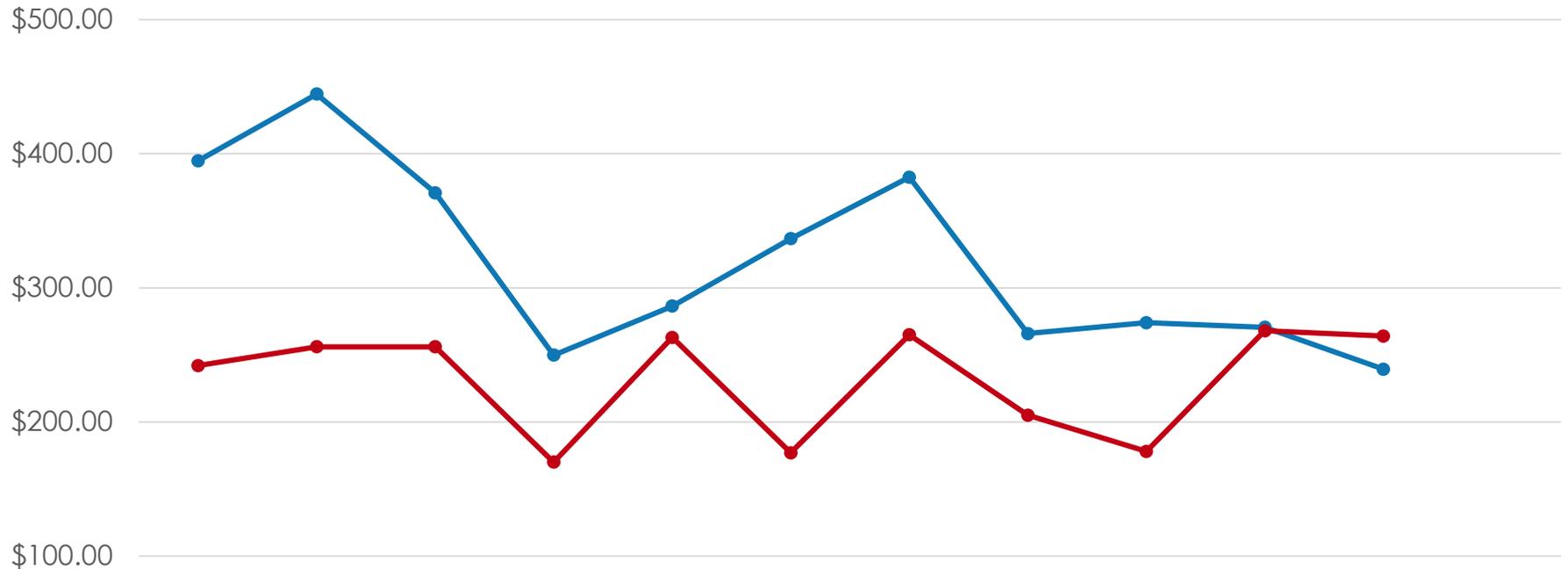

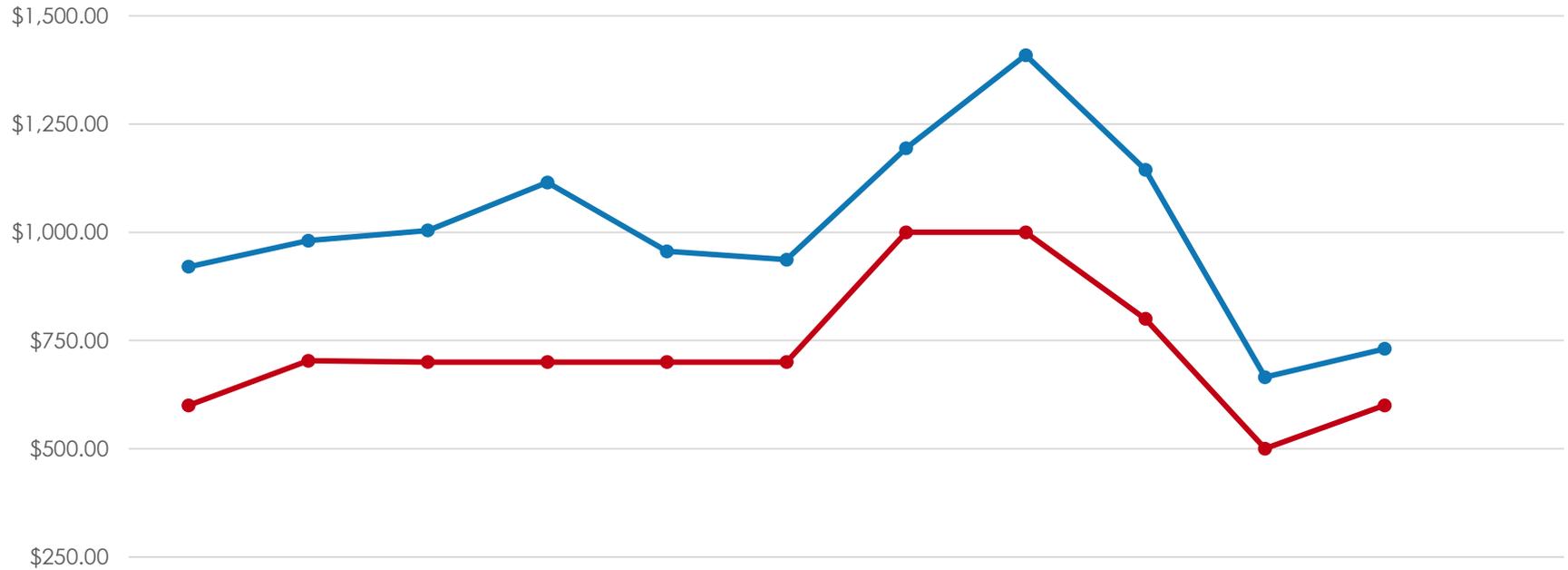|	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$920.41	$980.55	$1,004.04	$1,114.87	$955.97	$936.57	$1,194.12	$1,409.05	$1,144.30	$665.25	$730.58	
MEDIAN	$600.00	$703.00	$700.00	$700.00	$700.00	$700.00	$1,000.00	$1,000.00	$800.00	$500.00	$600.00	

On-Island Per Person – FY2017 Tracking
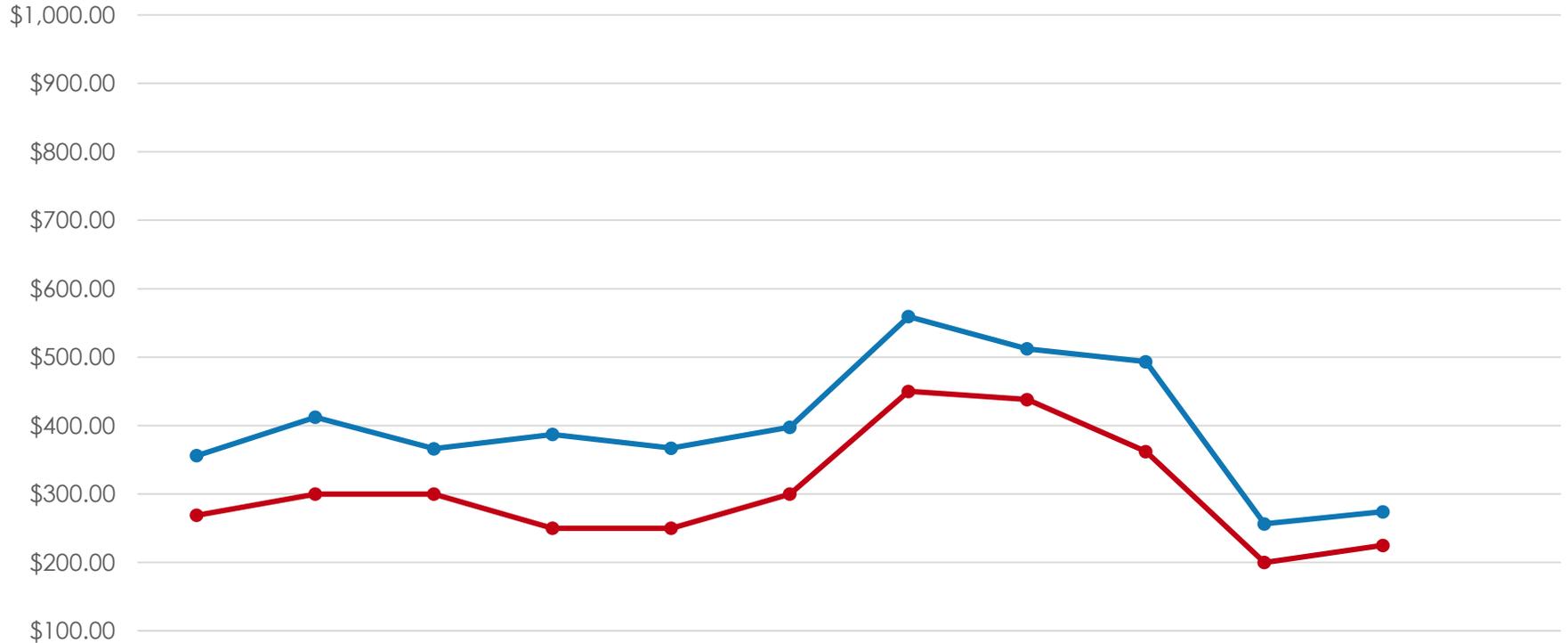
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$356.05	$412.21	$366.24	$386.94	$367.09	$397.56	$559.29	$512.14	$493.47	$256.35	$274.14	
MEDIAN	$269.00	$300.00	$300.00	$250.00	$250.00	$300.00	$450.00	$438.00	$362.00	$200.00	$225.00	

51

On-Island Per Person – Key Segments

GVB EXIT SURVEY
Q11A ONISLE EXPENDITURE- PER PERSO

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
ONISLE PP	Mean	$274.14	$183.33	$514.00	.	$336.31	$135.57	$312.55	$246.34	$329.57
	Median	$225	$0	$625	.	$300	$133	$233	$200	$250

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[A]

Per Person MEAN expenditures – FY2017 Tracking On-Island/ Prepaid
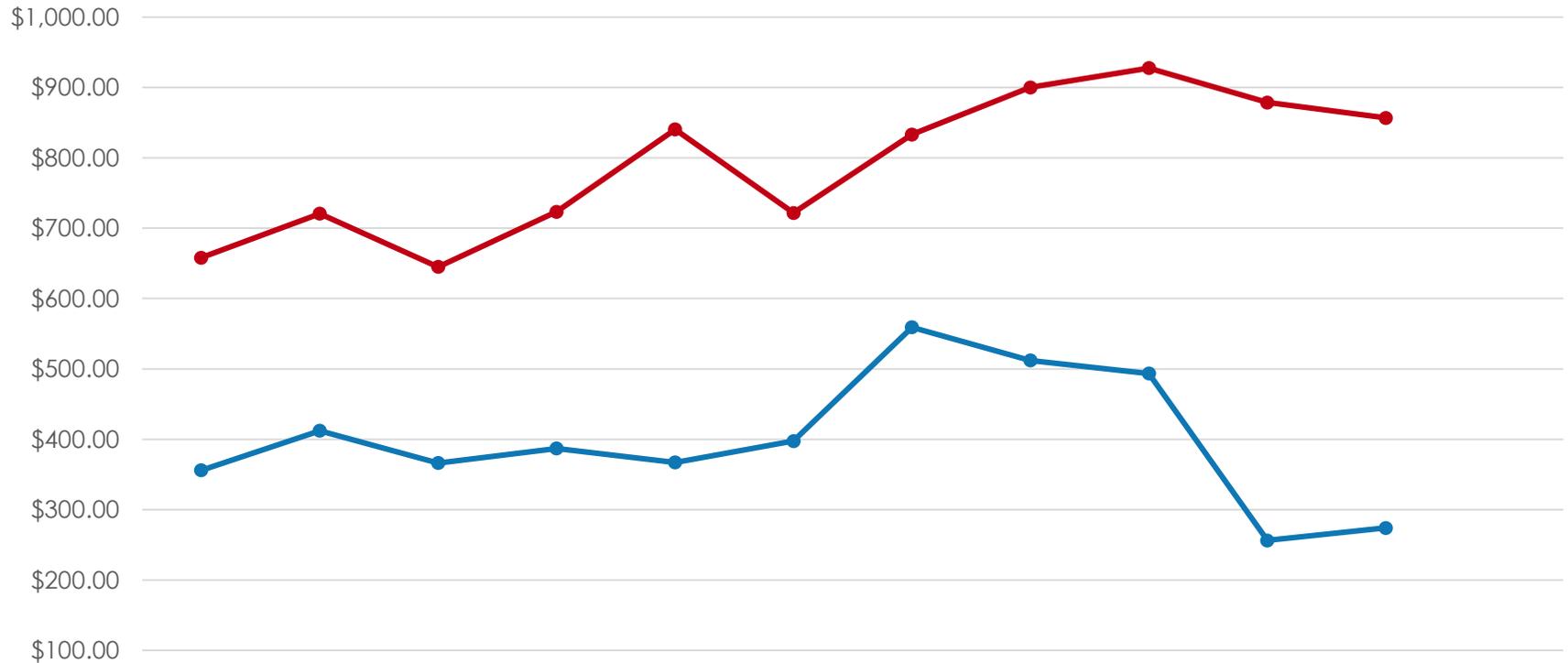
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
On-Island	$356.05	$412.21	$366.24	$386.94	$367.09	$397.56	$559.29	$512.14	$493.47	$256.35	$274.14	
Prepaid	$658.04	$720.62	$645.02	$723.26	$840.37	$721.76	$833.23	$900.01	$927.63	$878.71	$856.72	

[A]

On-Island Per Day Spending – FY2017 Tracking MEAN
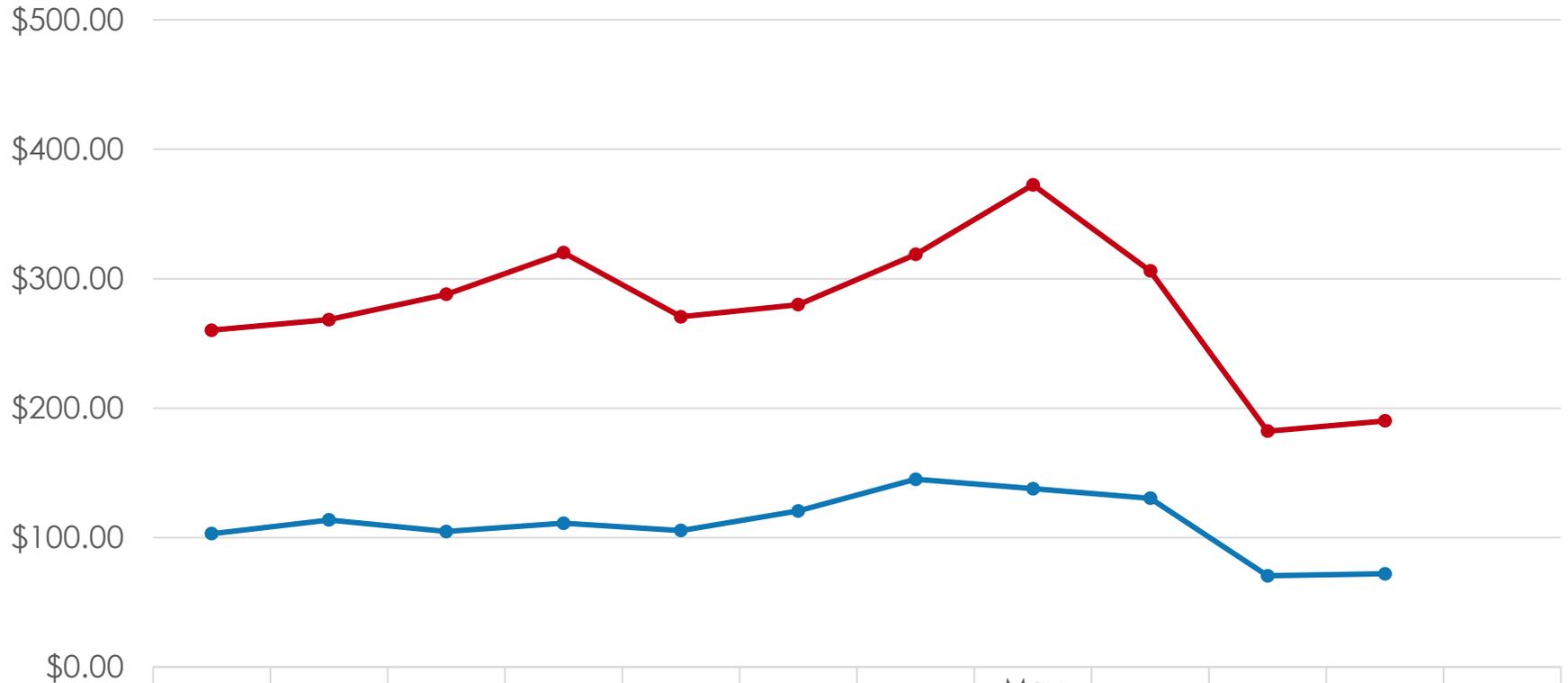
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Per Person	$103.06	$113.69	$104.72	$111.17	$105.45	$120.60	$145.12	$137.78	$130.47	$70.57	$72.11	
Travel Party	$260.30	$268.39	$287.95	$320.20	$270.68	$279.99	$318.80	$372.56	$306.08	$182.24	$190.27	

[A]

On-Island Expenses by Category – MEAN Entire Travel Party

Category	Mean
F&B Hotel	$84.50
F&B Fast Food/Conv Store	$96.63
F&B Restaurant	$165.65
Optional Tour	$128.92
Gift- Self	$292.71
Gift- Others	$74.43
Local Trans	$92.84
Other	$20.11

[A]

On-Island – FY2017 Tracking
Food & Beverage - Hotel

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$59.16	$48.88	$58.62	$123.52	$49.40	$45.71	$45.37	$50.47	$87.76	$44.08	$84.50	

[A]

On-Island – FY2017 Tracking
Food & Beverage – Fast Food/ Convenience Store

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$15.52	$19.20	$24.04	$31.06	$20.41	$14.82	$25.88	$32.67	$77.26	$71.30	$96.63	

[A]
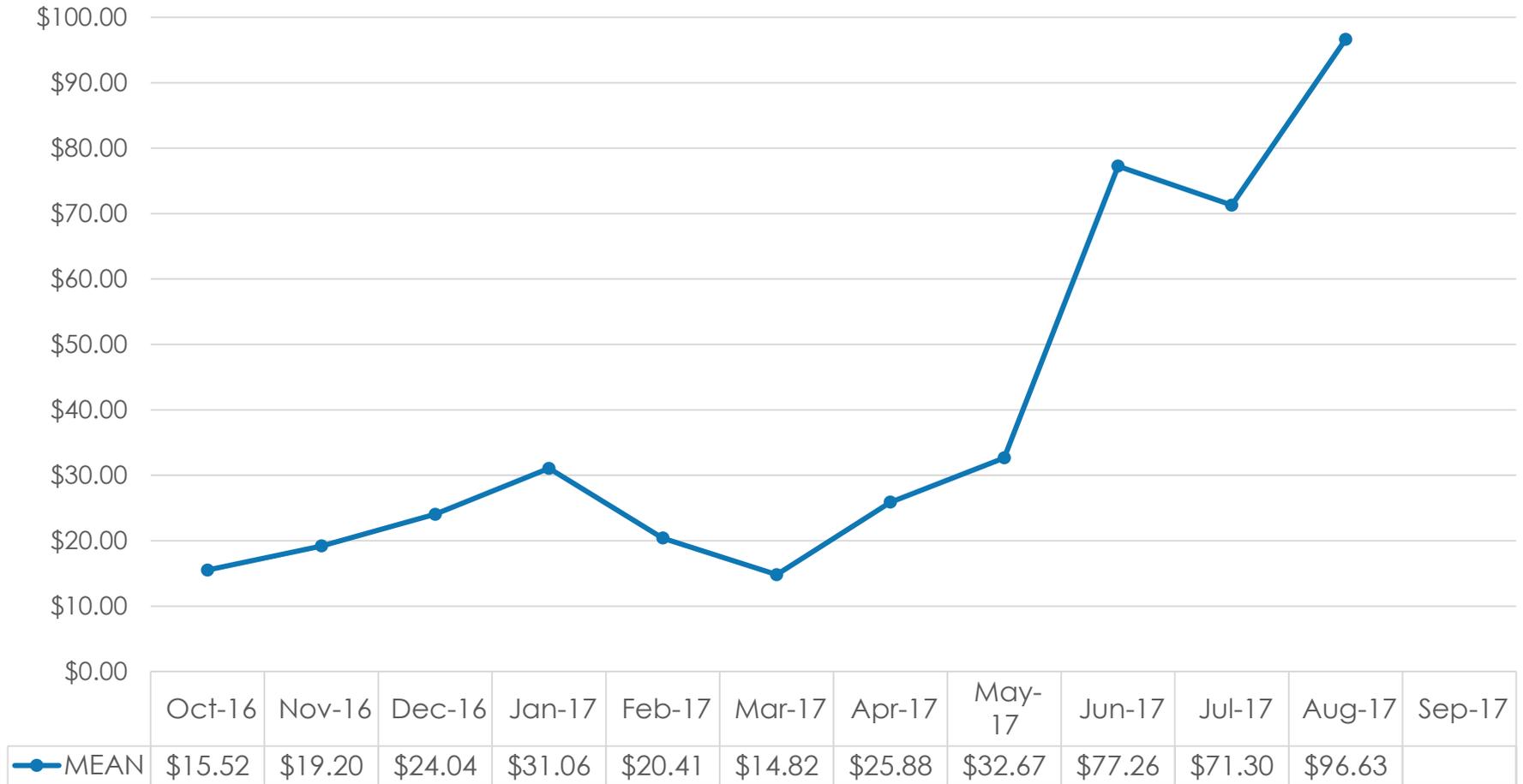
On-Island – FY2017 Tracking
Food & Beverage – Restaurant/ Drinking Est Outside Hotel

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$68.52	$79.78	$72.51	$112.54	$76.38	$87.48	$136.98	$201.32	$307.80	$199.23	$165.65	

[A]
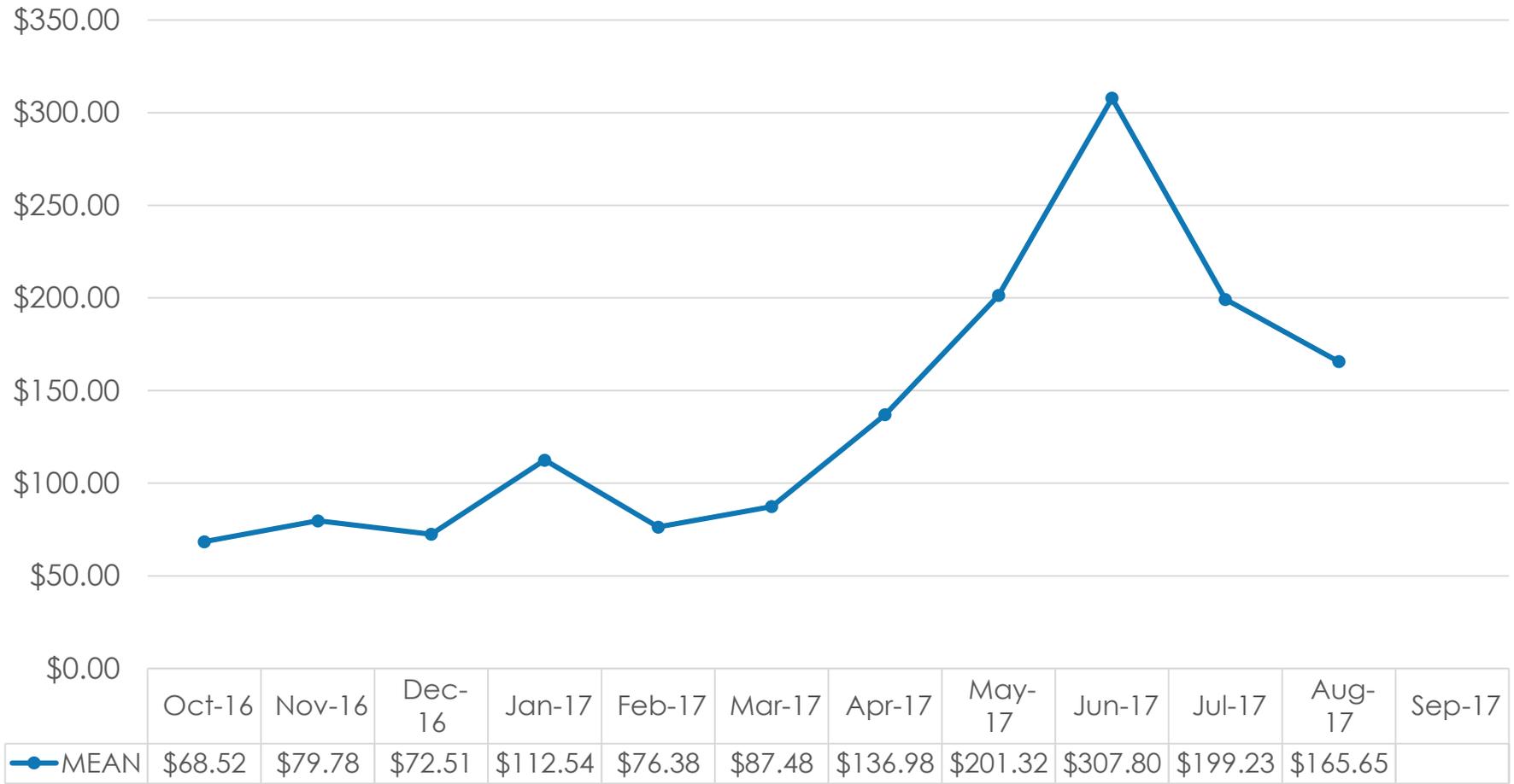
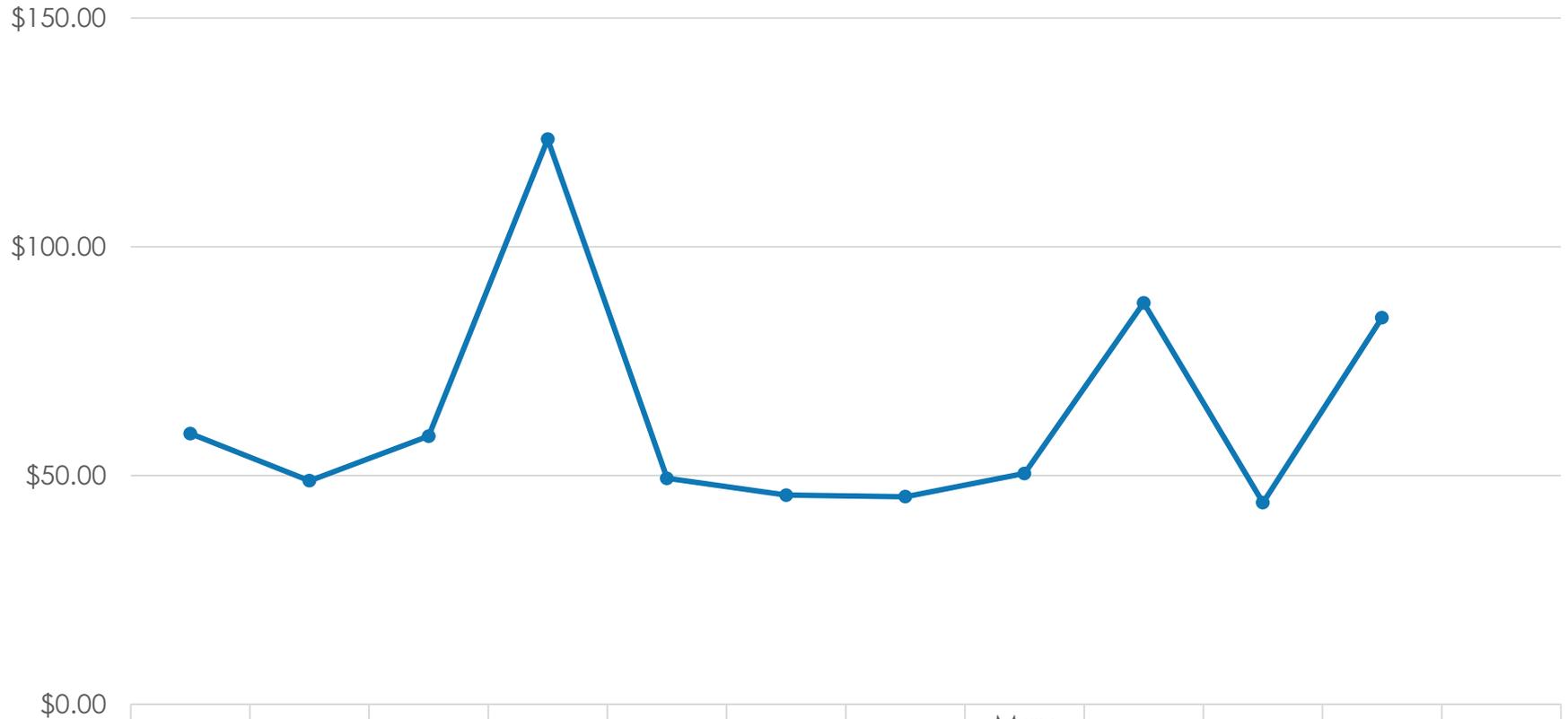# On-Island – FY2017 Tracking
Optional tour/ Activities

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$52.30	$53.47	$70.58	$68.44	$56.06	$52.85	$88.57	$72.64	$99.14	$102.86	$128.92	

[A]
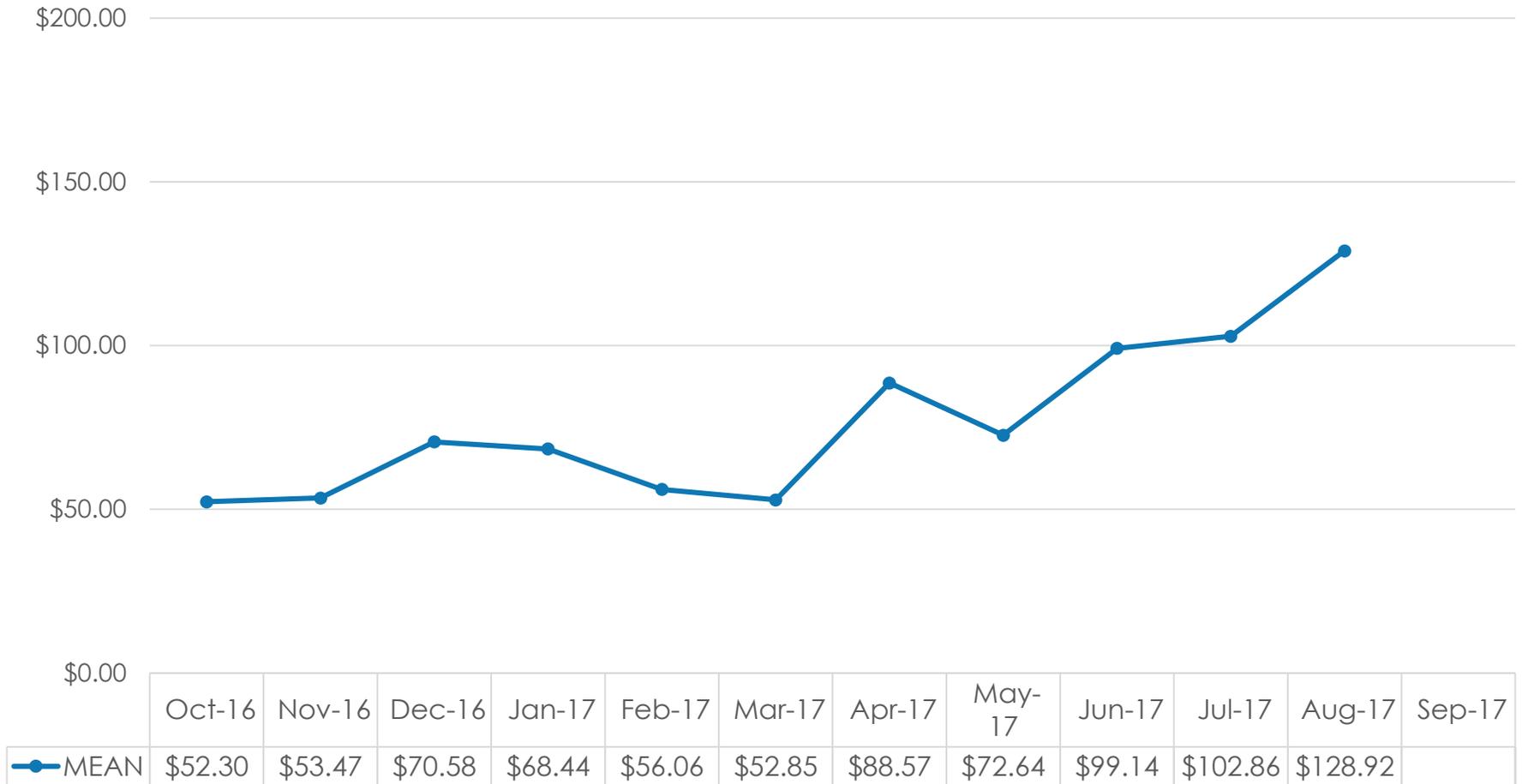
On-Island – FY2017 Tracking
Gift/ Souvenir – Self/ Companion

|	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$116.00	$149.39	$158.19	$126.27	$139.74	$159.67	$304.16	$311.61	$430.77	$290.04	$292.71	

[A]
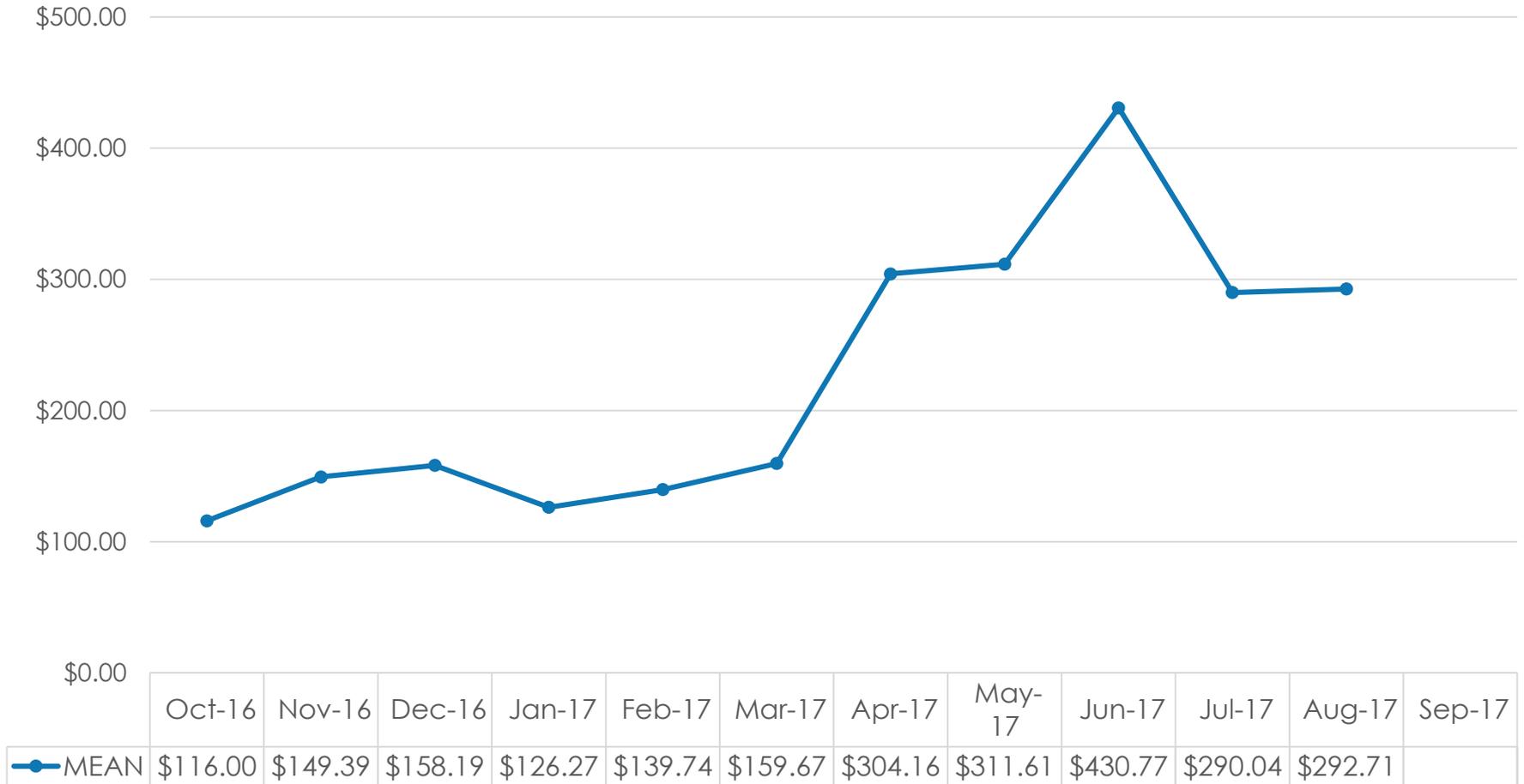
On-Island – FY2017 Tracking
Gift/ Souvenir – Friends/ Family

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$93.73	$80.82	$64.17	$63.26	$99.25	$80.04	$184.69	$112.67	$141.52	$82.85	$74.43	

[A]
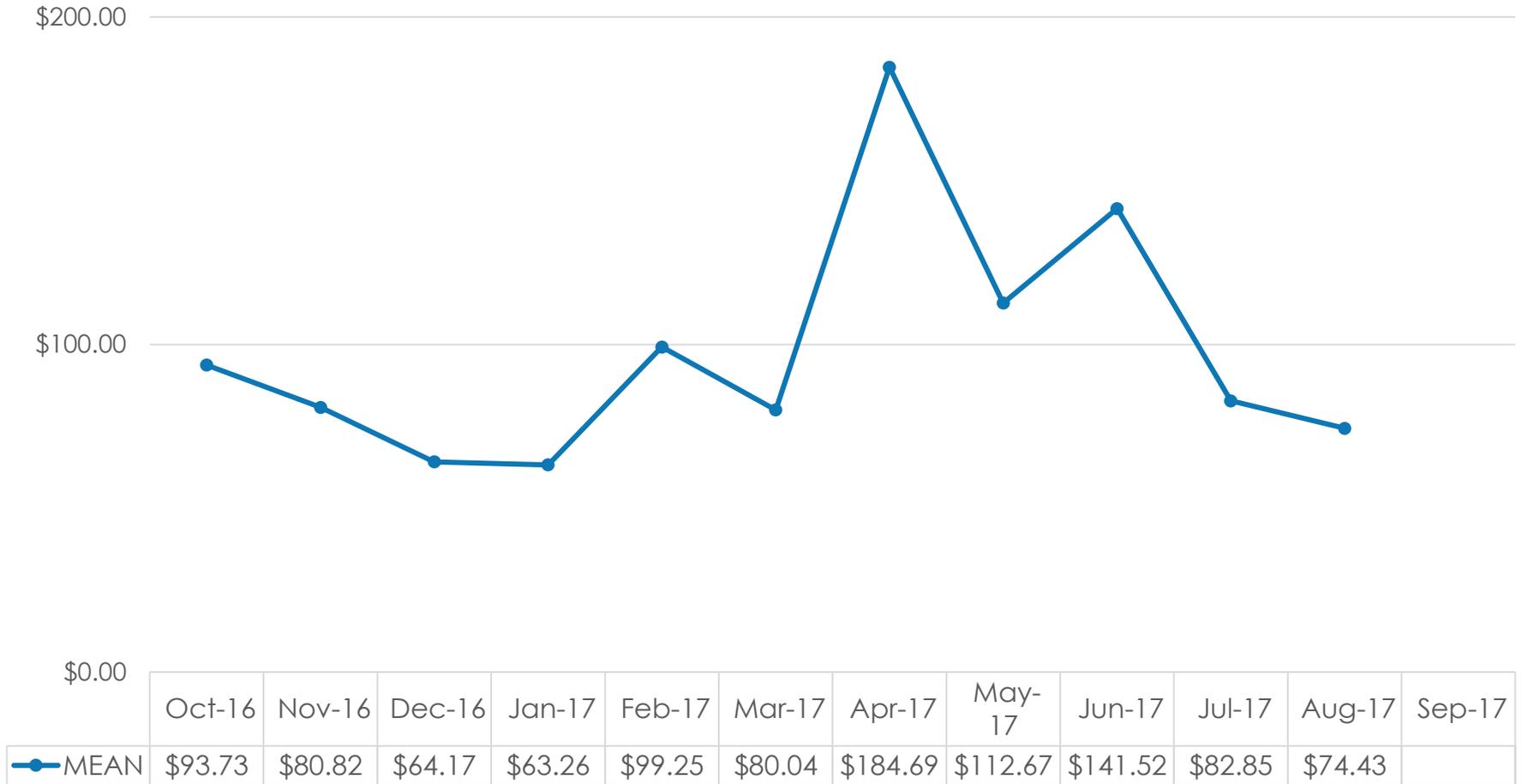
On-Island – FY2017 Tracking
Local Transportation

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$47.49	$43.57	$37.65	$41.80	$43.48	$49.42	$59.08	$69.65	$65.28	$82.76	$92.84	
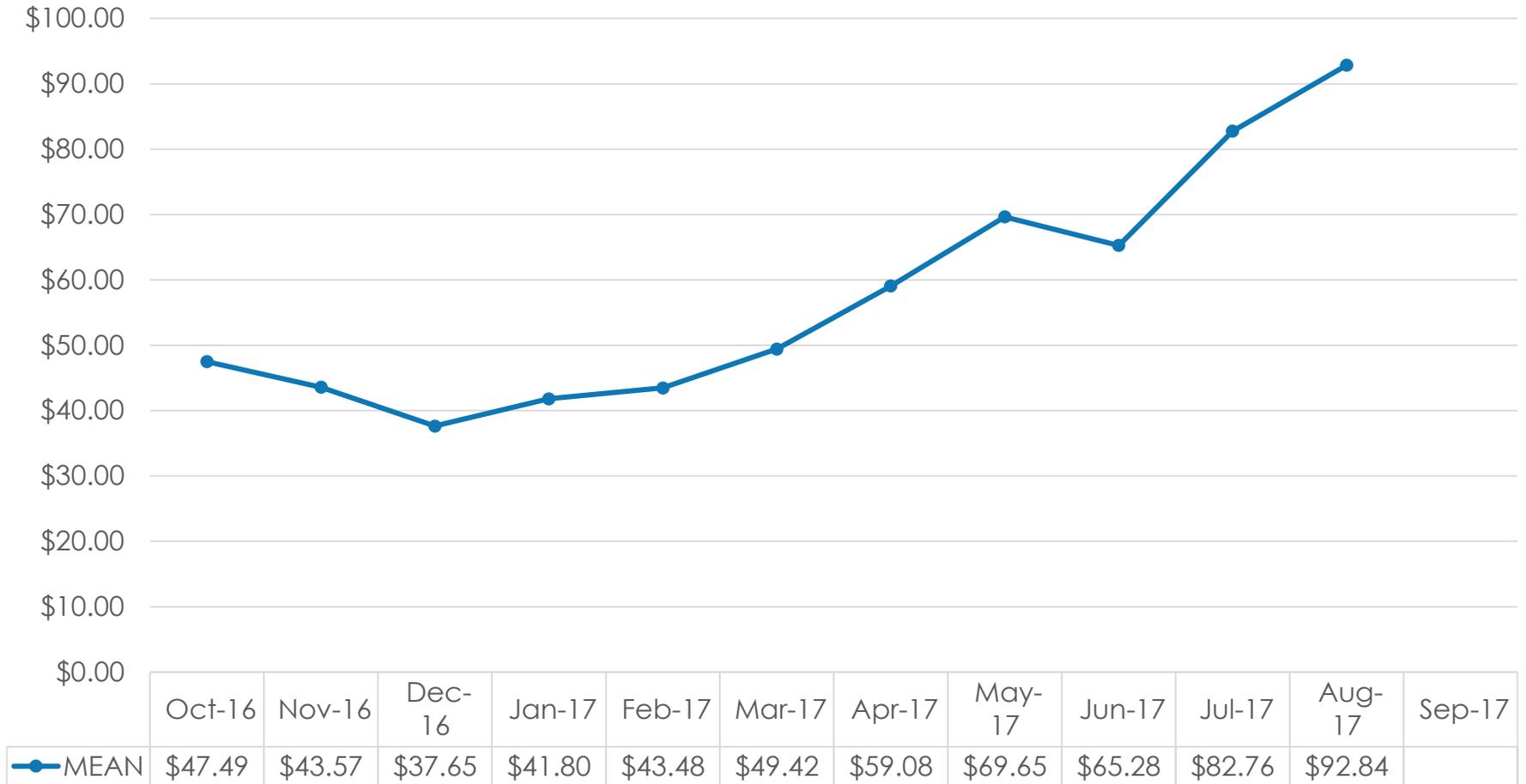
On-Island – FY2017 Tracking
Other Not Included

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$471.58	$506.09	$515.43	$547.99	$471.45	$446.58	$16.28	$15.88	$41.59	$13.92	$20.11	

[A]
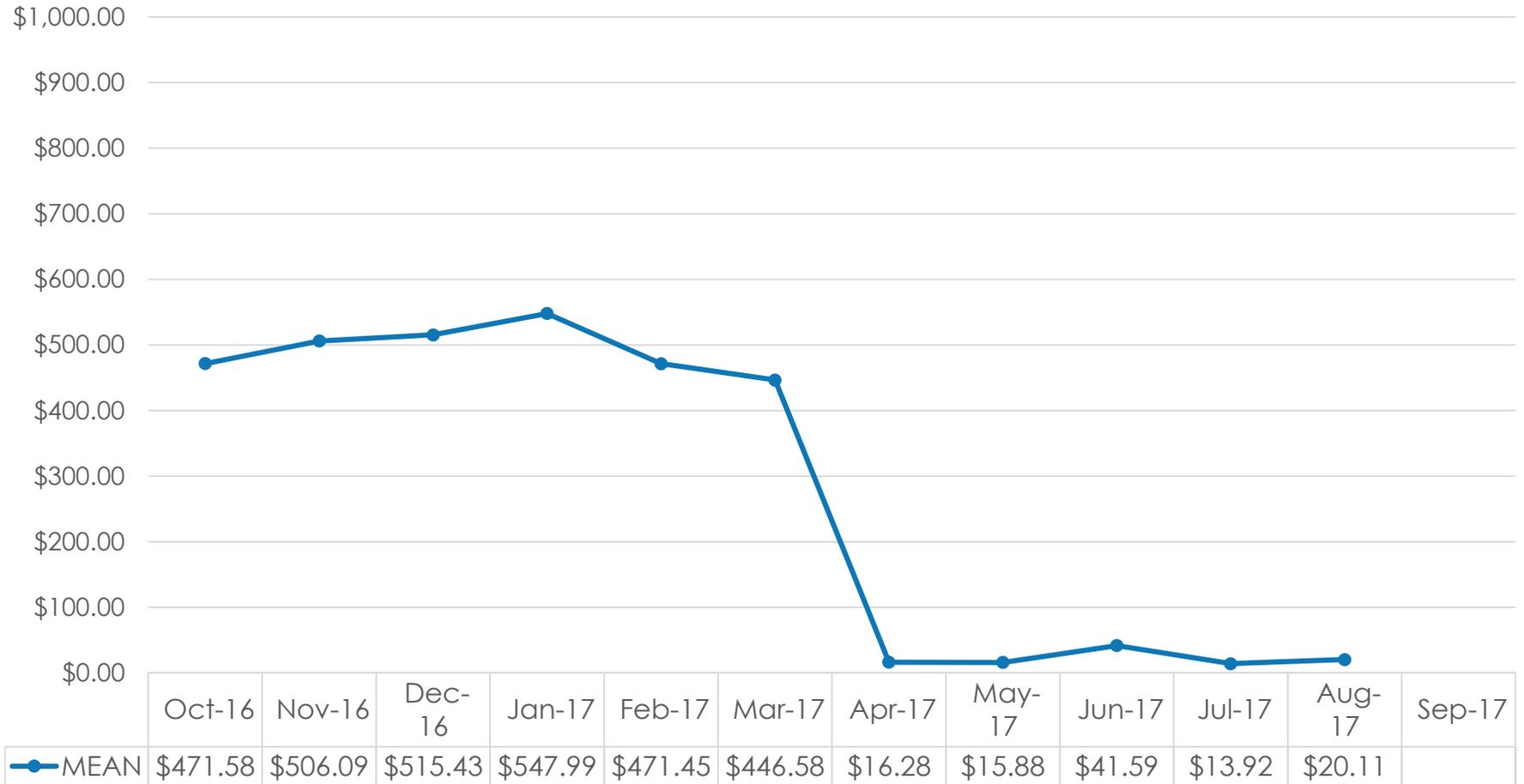
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- $1,130.86 = overall mean average prepaid & on-isle expense by respondent

[A]

TOTAL Per Person Expenditures – FY2017 Tracking
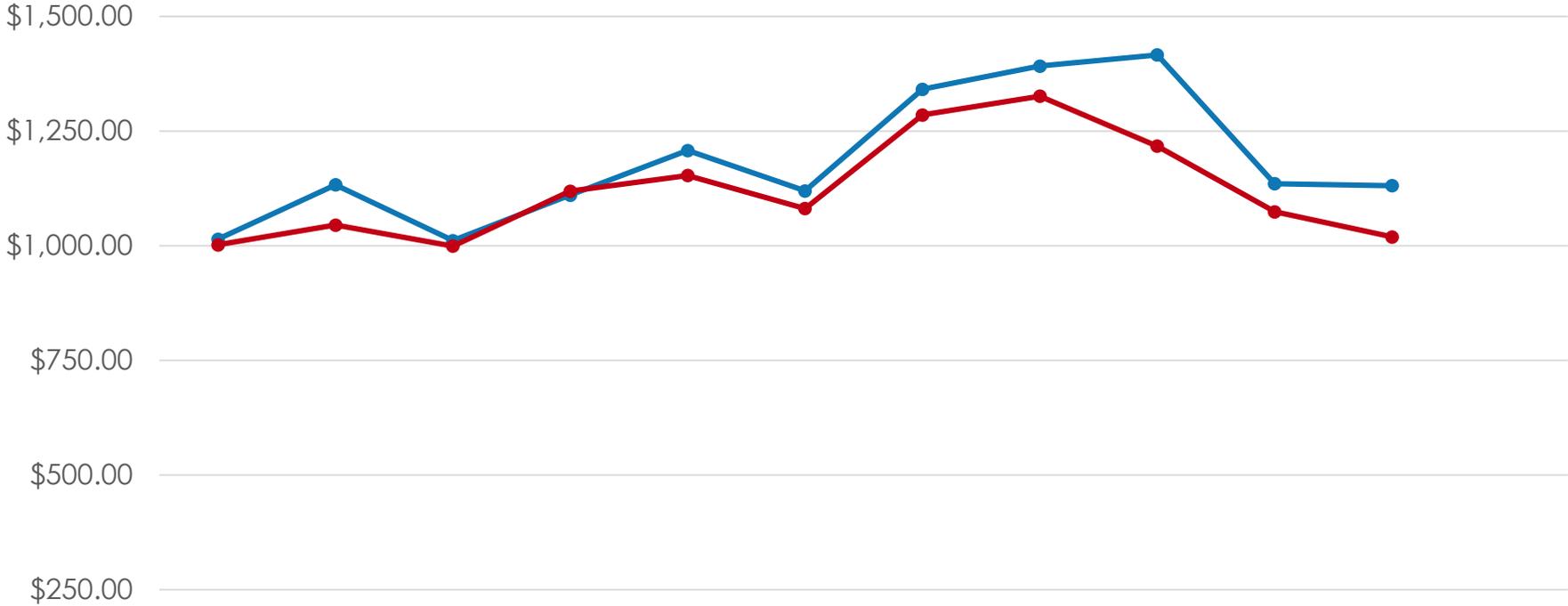
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$1,014.09	$1,132.84	$1,011.26	$1,110.20	$1,207.47	$1,119.32	$1,340.96	$1,391.46	$1,415.86	$1,135.06	$1,130.86	
MEDIAN	$1,002.00	$1,045.00	$999.00	$1,119.00	$1,153.00	$1,081.00	$1,285.00	$1,326.00	$1,217.00	$1,074.00	$1,019.00	

[A]

TOTAL Per Person Expenditures – Key Segments

GVB EXIT SURVEY
TOTAL- PER PERSO

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
TOTAL PP	Mean	$1,130.86	$611.88	$1,906.89	.	$1,230.58	$941.89	$1,066.96	$1,091.97	$1,156.71
	Median	$1,019	$551	$2,007	.	$1,102	$890	$968	$999	$980

Prepared by Anthology Research

GUAM AIRPORT EXPENDITURE – FY2017 Tracking

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$58.60	$70.63	$86.60	$69.24	$52.05	$86.97	$105.76	$115.81	$87.53	$36.05	$45.76	

[A]

SECTION 4

VISITOR SATISFACTION

BEHAVIOR

[A]

OVERALL SATISFACTION

Legend: Very Satisfied (Top Box) | MEAN (7pt Scale)

Month	Very Satisfied (Top Box)	MEAN (7pt Scale)
Oct-16	17%	5.54
Nov-16	22%	5.67
Dec-16	19%	5.73
Jan-17	21%	5.76
Feb-17	25%	5.76
Mar-17	27%	5.78
Apr-17	21%	5.41
May-17	20%	5.43
Jun-17	20%	5.56
Jul-17	15%	5.15
Aup-17	18%	5.05
Sep-17		

[A]

Positive aspects of trip (Top Reason)

Aspect	Percentage
Natural beauty	15%
Friendly/ Warm ppl	14%
Pkg tour/ activity	13%
Hotel/ accommodation	12%
Relaxing	9%
Event- observed	8%
Shopping	7%
Beach/ Ocean	7%
Safety	6%
Event/ Celebration	5%
Weather/ climate	4%

[A]

Negative aspects of trip (Top Reason)

Category	Percentage
Nothing	20%
Expensive/ Cost	13%
Immigration	12%
Variety- activities	11%
Customer service	7%
Food- quality	6%
Ground Trans	5%
Food- variety	4%
Dining- poor service	4%
Driving experience	4%

[A]

Guam was better than expected

Strongly agree ▬ MEAN (7pt Scale) ●
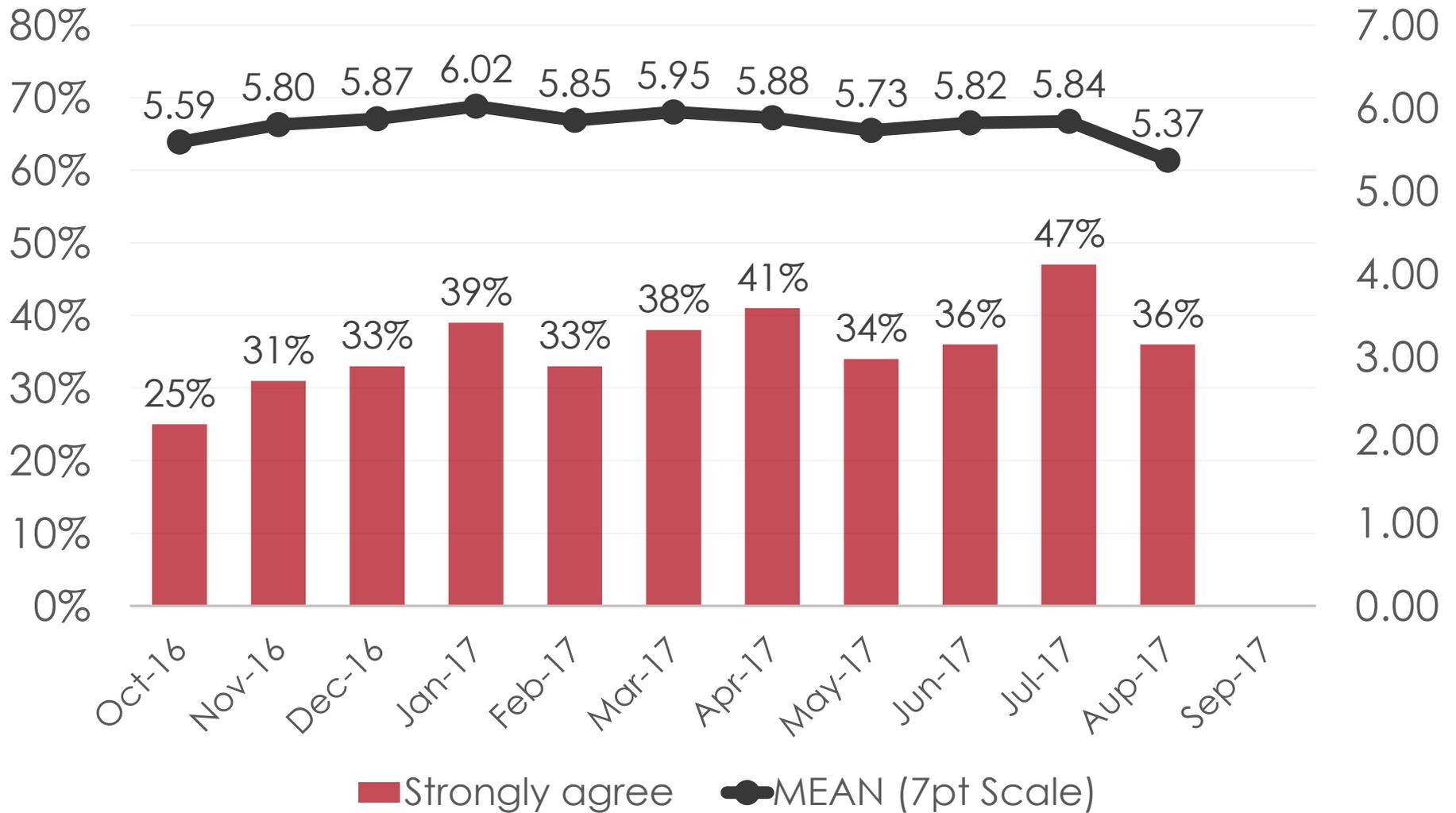
I had no communication problems

Strongly agree · MEAN (7pt Scale)
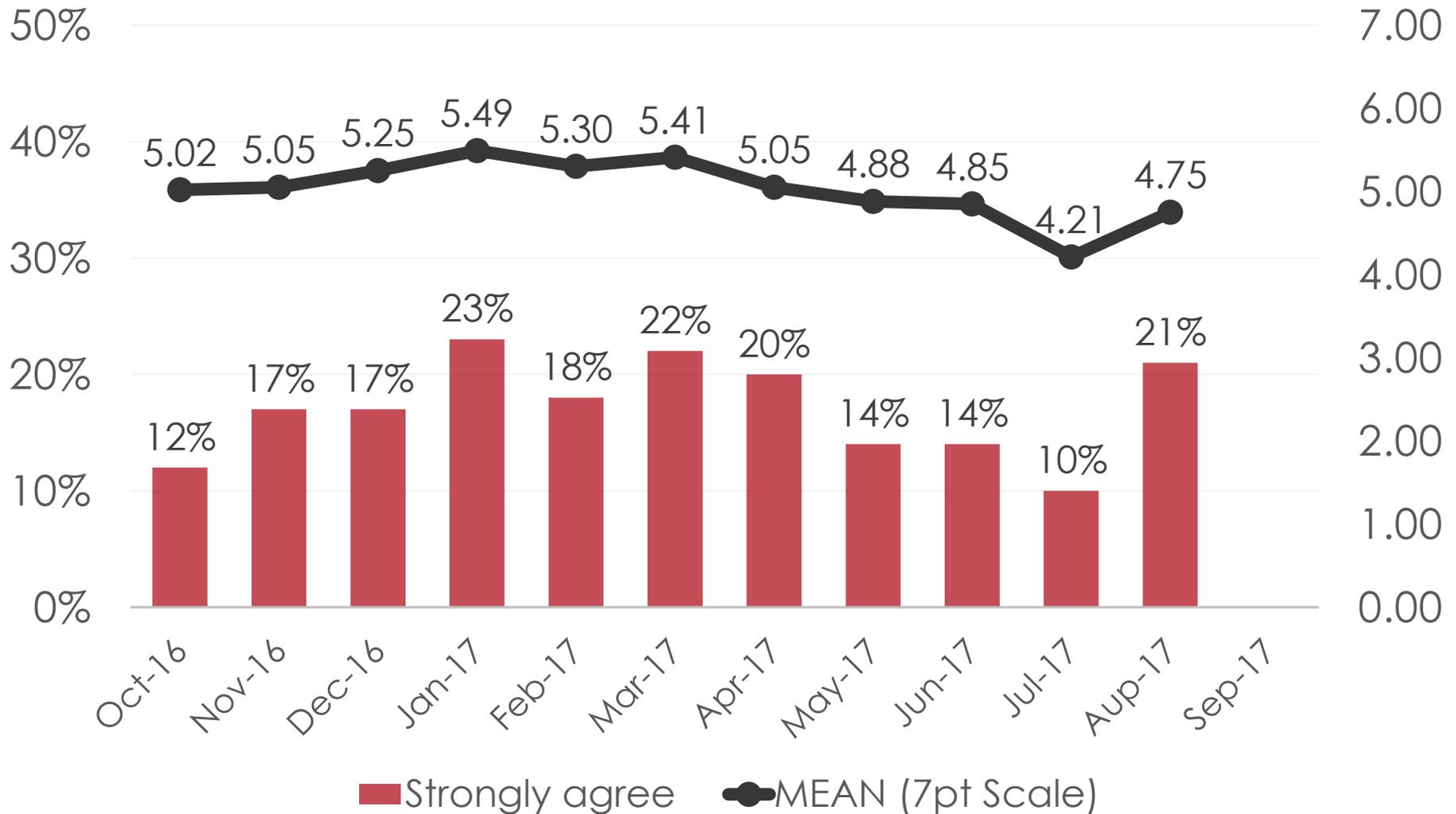
I will recommend Guam to friends

Legend: Strongly agree — MEAN (7pt Scale)

74
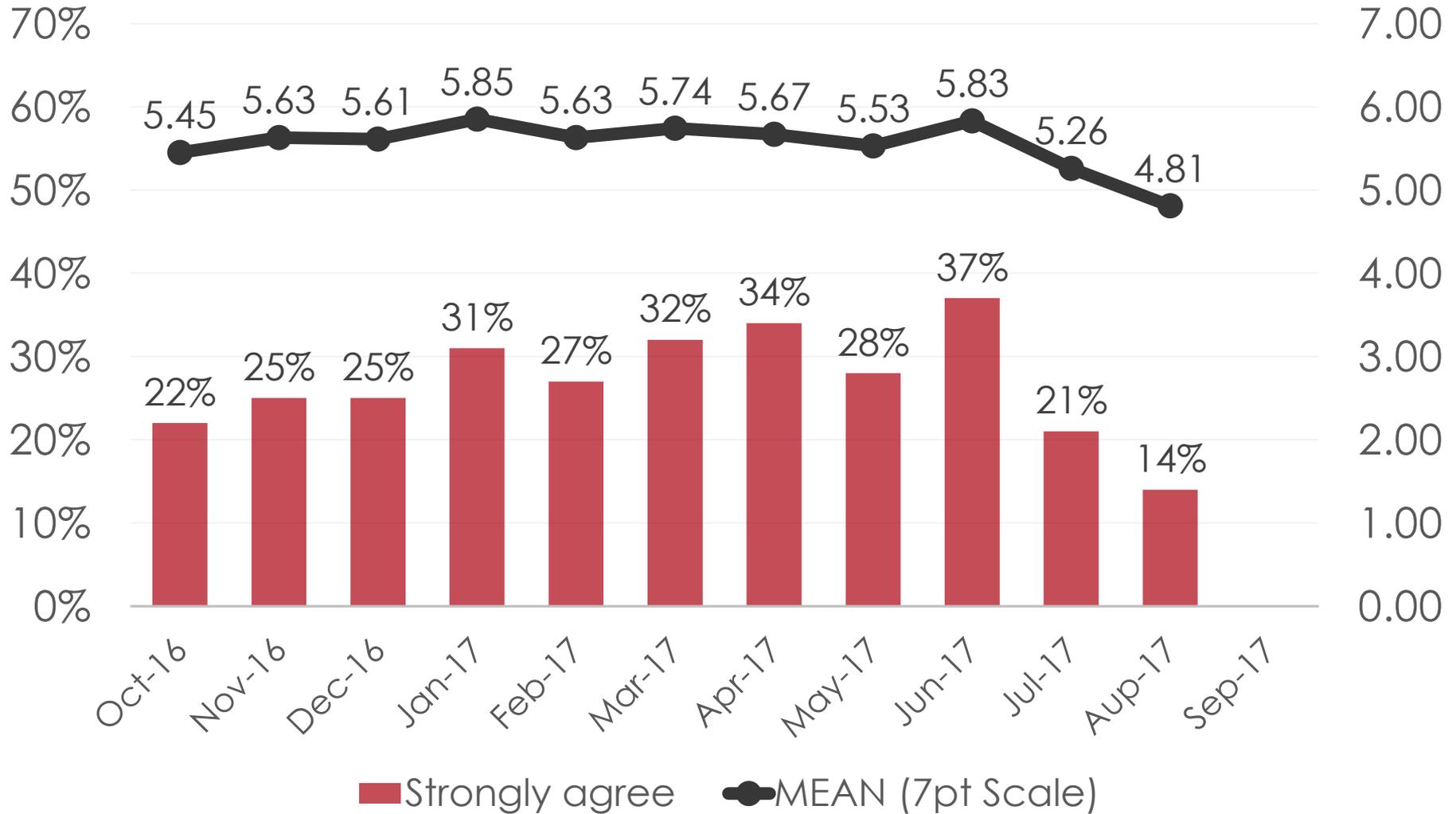
Sites on Guam were attractive

Strongly agree ——●—— MEAN (7pt Scale)

[A]
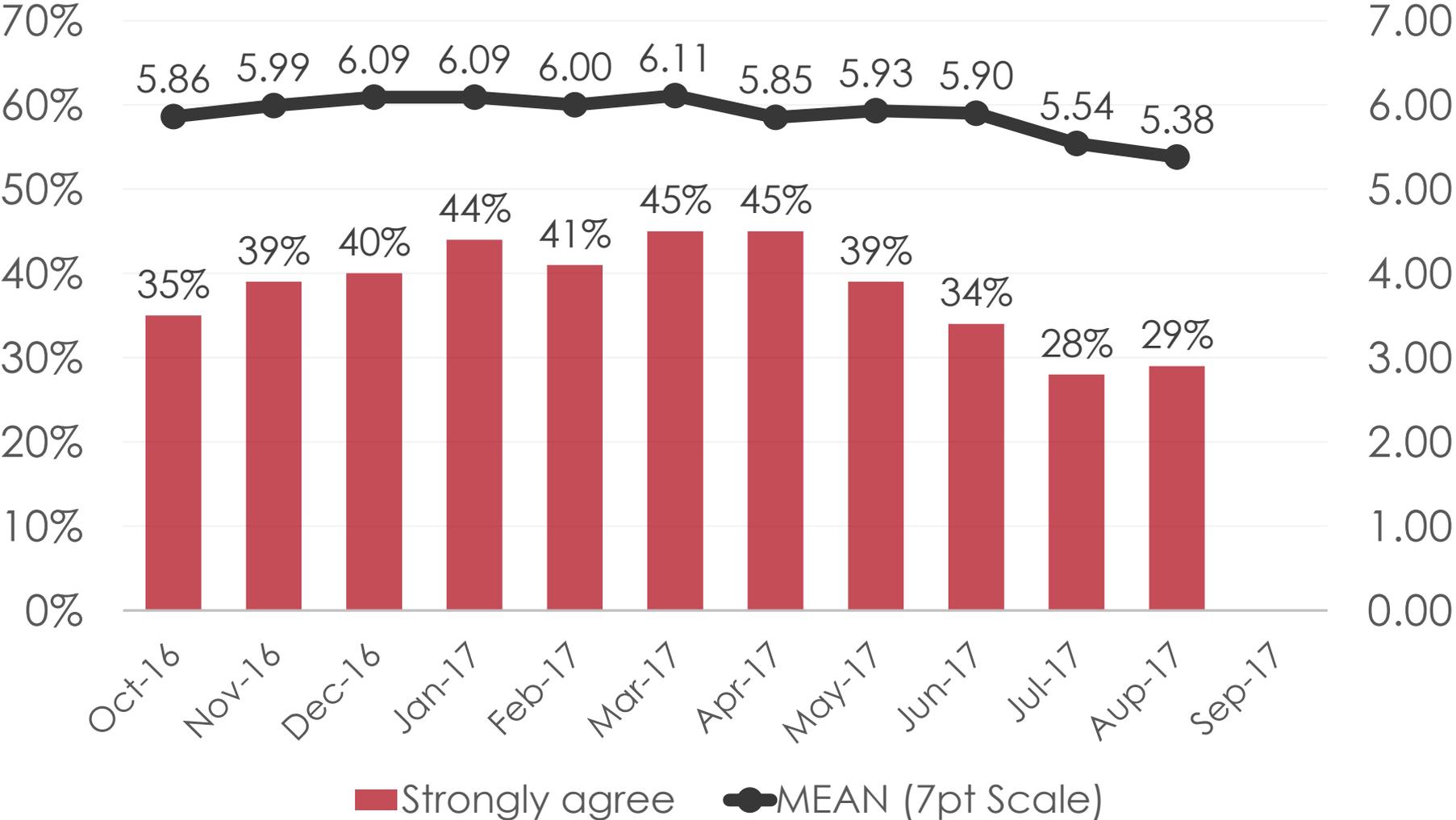
I plan to visit Guam again

Chart showing "Strongly agree" percentages and MEAN (7pt Scale) by month:

Month	Strongly agree	MEAN (7pt Scale)
Oct-16	25%	5.44
Nov-16	29%	5.73
Dec-16	30%	5.72
Jan-17	35%	5.77
Feb-17	28%	5.56
Mar-17	35%	5.67
Apr-17	36%	5.58
May-17	29%	5.48
Jun-17	28%	5.67
Jul-17	24%	5.32
Aup-17	25%	5.44
Sep-17		

■ Strongly agree ●— MEAN (7pt Scale)

[A]
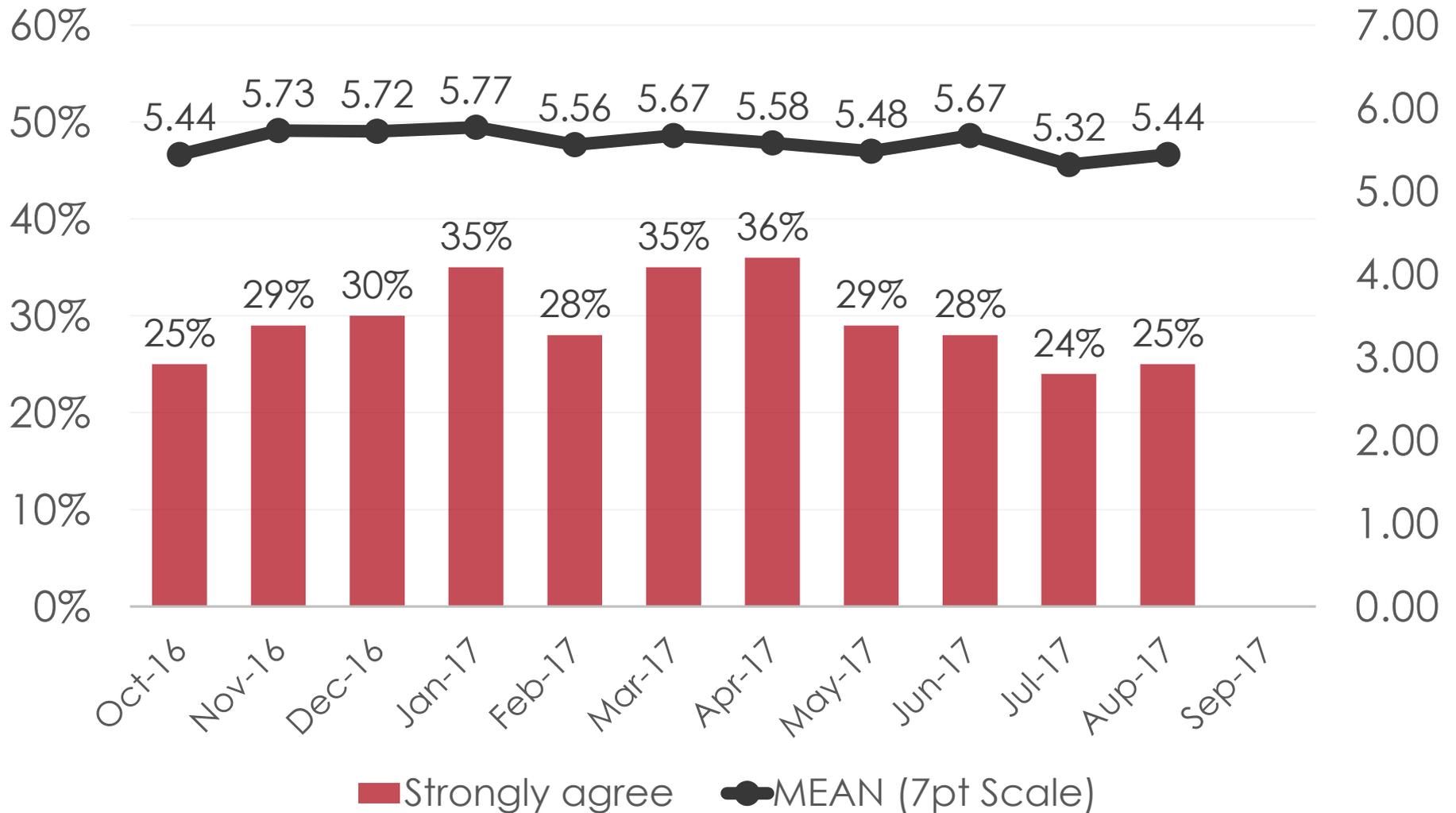
Not enough night time activities

50% · 40% · 30% · 20% · 10% · 0%

7.00 · 6.00 · 5.00 · 4.00 · 3.00 · 2.00 · 1.00 · 0.00

5.21 5.15 5.19 5.25 5.12 5.18 5.08 4.85 4.98 4.85 4.96

18% 16% 17% 17% 18% 20% 23% 15% 16% 16% 12%

Oct-16 Nov-16 Dec-16 Jan-17 Feb-17 Mar-17 Apr-17 May-17 Jun-17 Jul-17 Aup-17 Sep-17

■ Strongly agree ━●━ MEAN (7pt Scale)

77
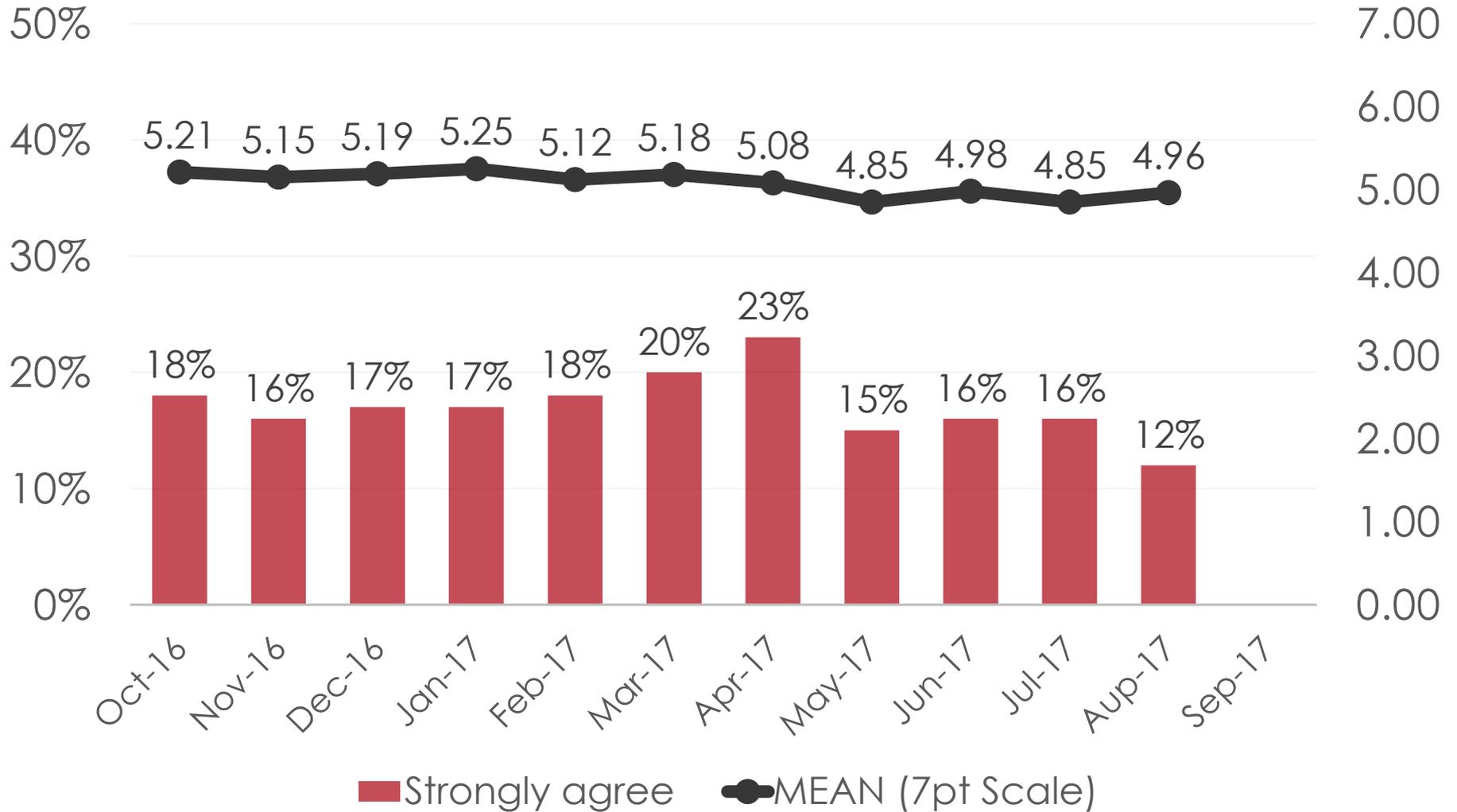
Tour guides were professional

Legend: Strongly agree (bar) · MEAN (7pt Scale) (line)

Months: Oct-16, Nov-16, Dec-16, Jan-17, Feb-17, Mar-17, Apr-17, May-17, Jun-17, Jul-17, Aug-17, Sep-17

Strongly agree: 25%, 22%, 23%, 25%, 24%, 24%, 28%, 24%, 25%, 22%, 22%

MEAN: 5.48, 5.36, 5.47, 5.53, 5.42, 5.34, 5.36, 5.39, 5.47, 5.36, 5.43

78

[A]

Tour drivers were professional

5.54 5.42 5.46 5.57 5.44 5.41 5.39 5.45 5.52 5.43 5.22

25% 22% 22% 23% 24% 24% 28% 25% 28% 23% 17%

Oct-16 Nov-16 Dec-16 Jan-17 Feb-17 Mar-17 Apr-17 May-17 Jun-17 Jul-17 Aup-17 Sep-17

■ Strongly agree ━●━ MEAN (7pt Scale)
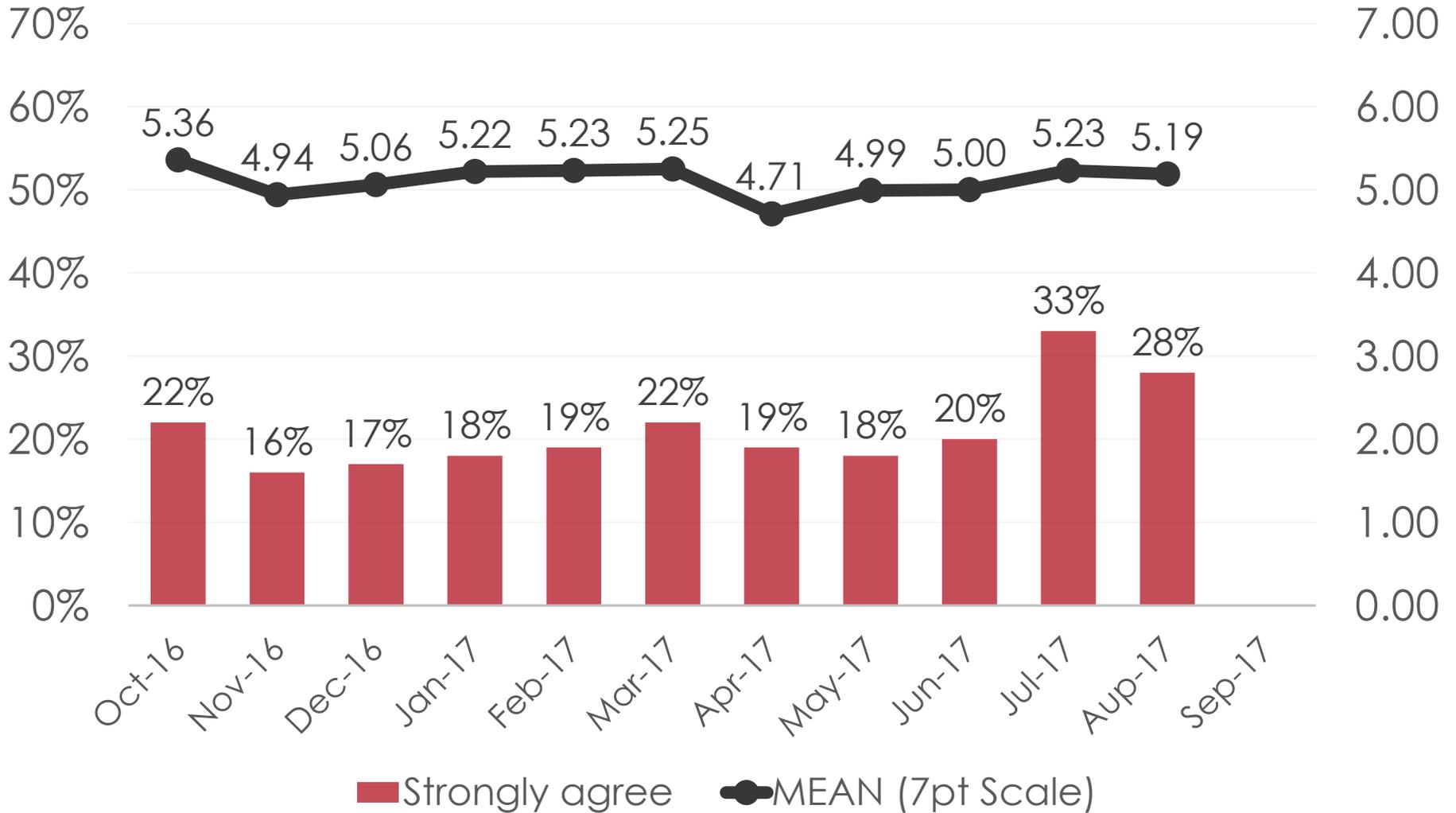
[A]
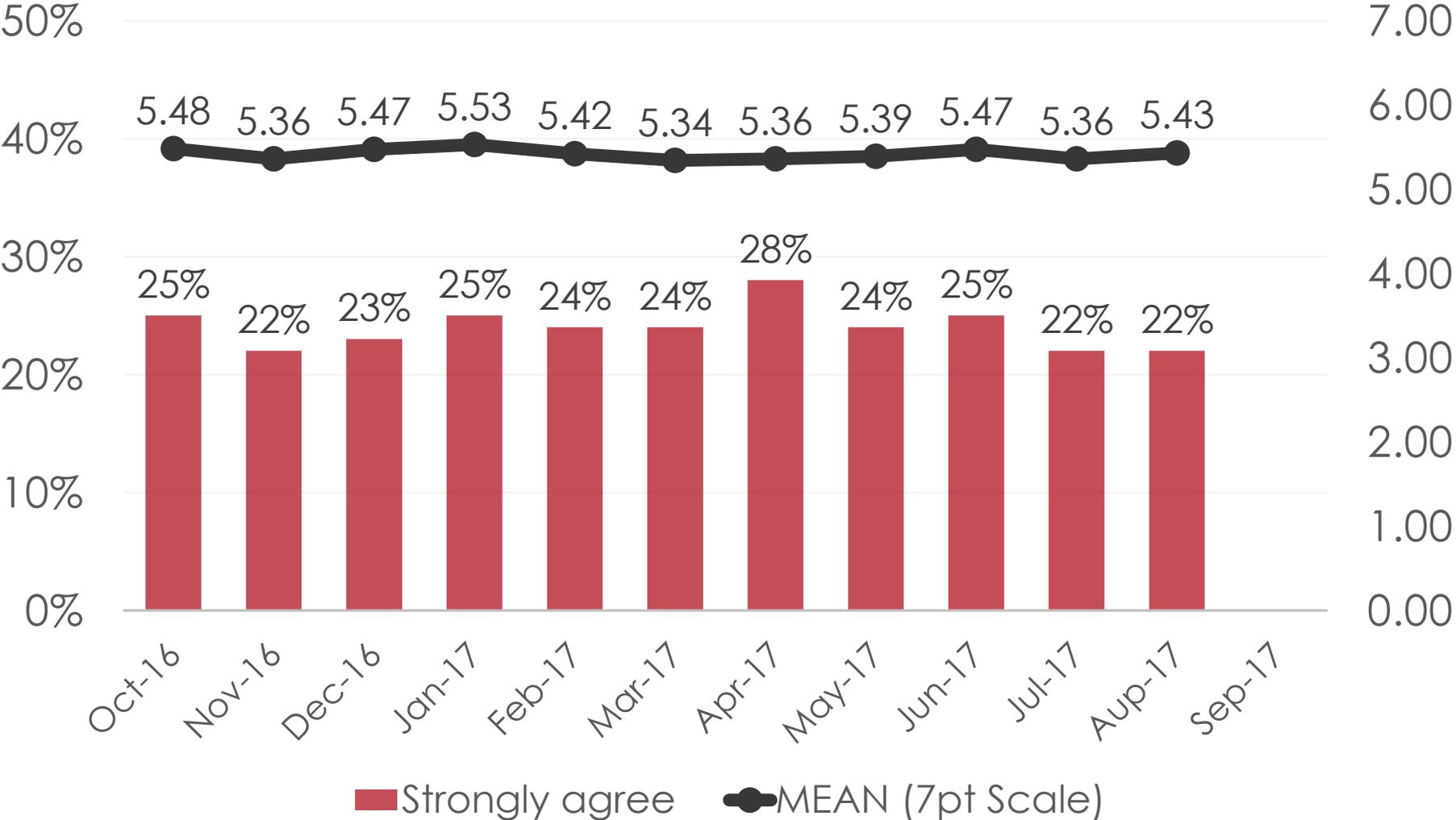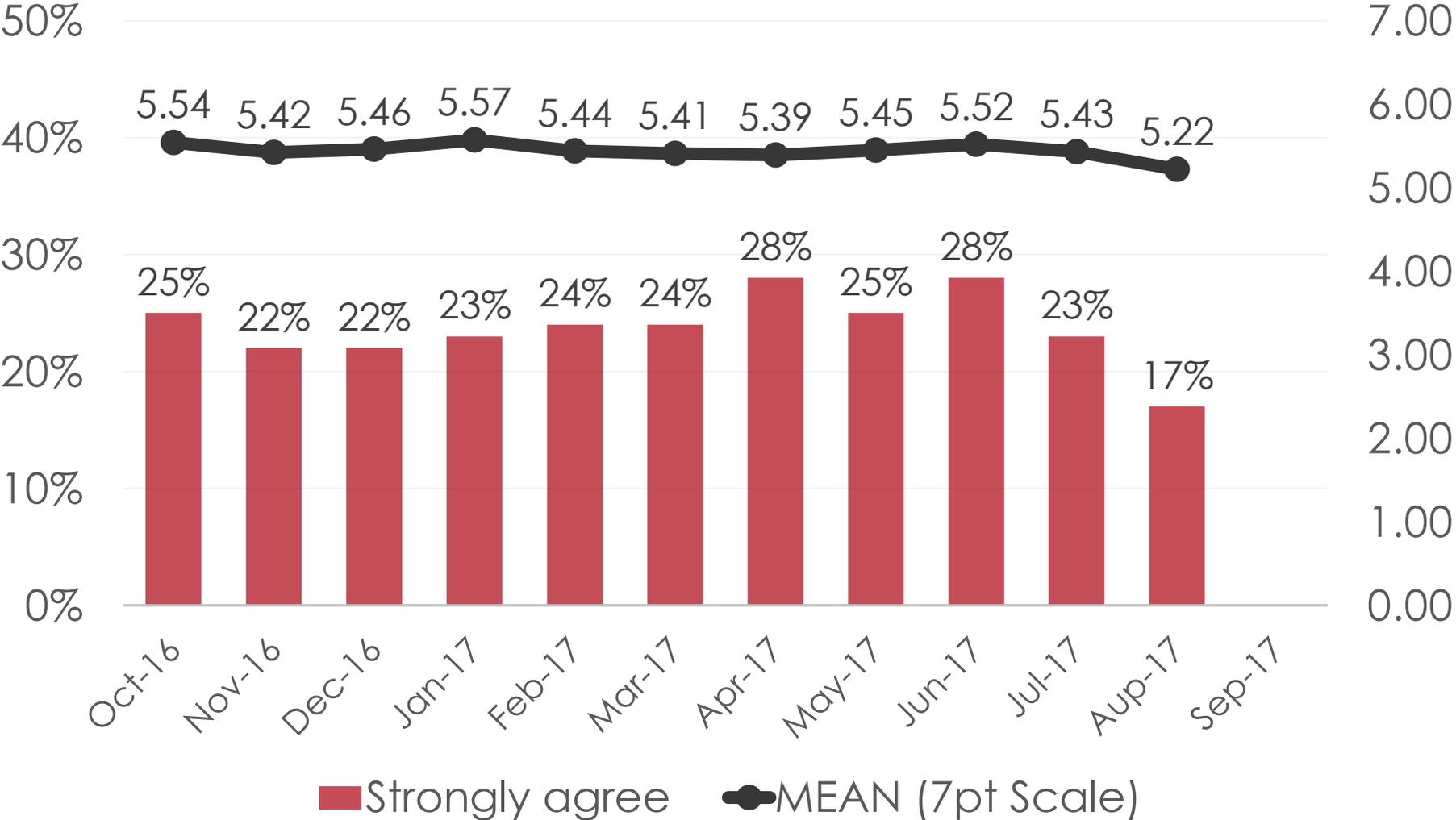
Taxi drivers were professional
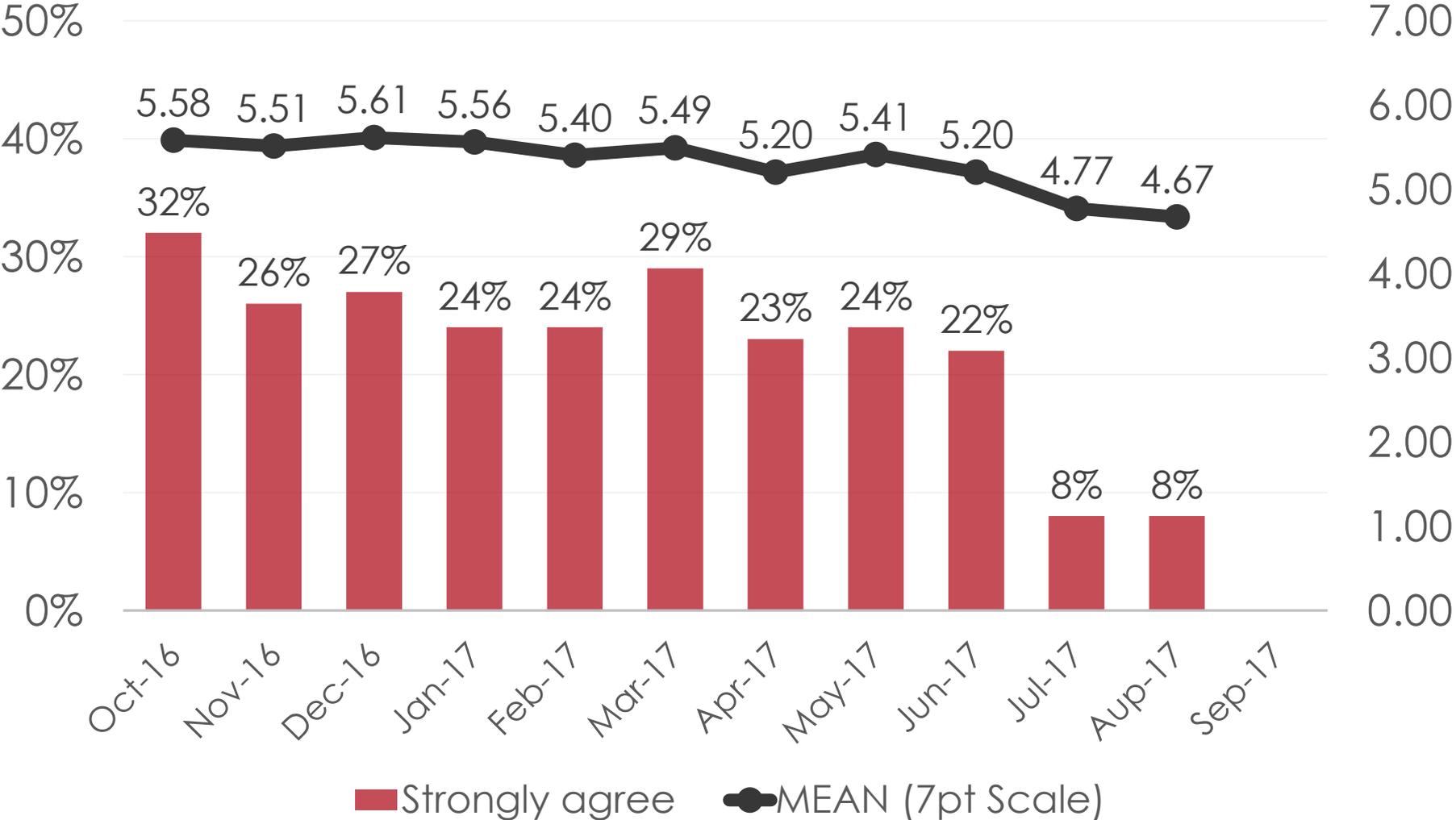
Taxis were clean

Guam airport was clean

5.36   4.94   5.06   5.22   5.23   5.25   4.71   4.99   5.00   5.23   5.19

22%   16%   17%   18%   19%   22%   19%   18%   20%   33%   28%

Oct-16, Nov-16, Dec-16, Jan-17, Feb-17, Mar-17, Apr-17, May-17, Jun-17, Jul-17, Aup-17, Sep-17

Legend: Strongly agree — MEAN (7pt Scale)

GENERAL SATISFACTION

Very Satisfied (Top Box) — MEAN (7pt Scale)

Ease of getting around: 39%, 5.42
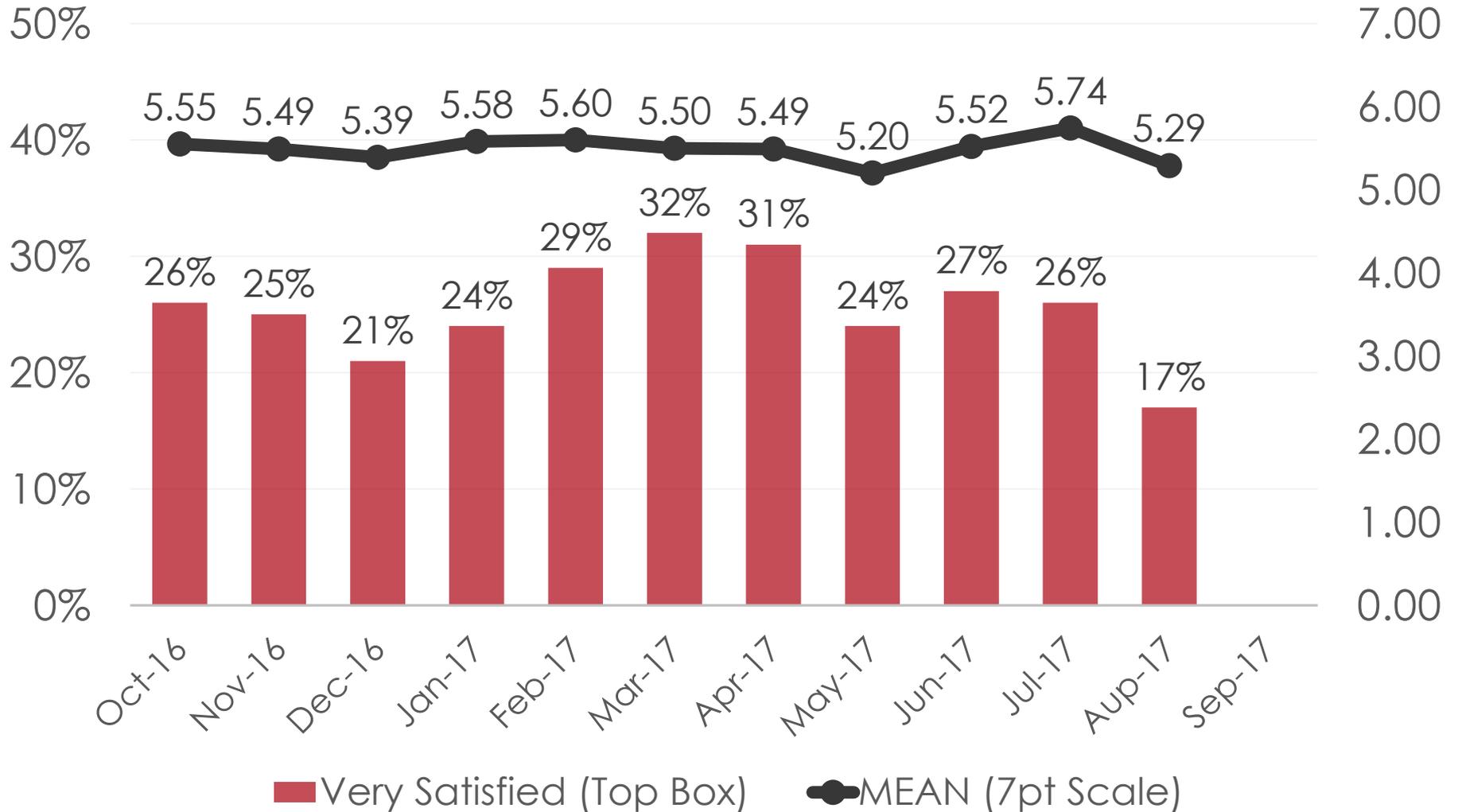Safety walking at night: 18%, 5.10
Price of things on Guam: 24%, 5.24

GENERAL SATISFACTION –
Quality/ Cleanliness

ACCOMMODATIONS –
OVERALL SATISFACTION

Legend: Very Satisfied (Top Box) ■ ; MEAN (7pt Scale) ●

MEAN (7pt Scale) values: Oct-16: 5.55, Nov-16: 5.49, Dec-16: 5.39, Jan-17: 5.58, Feb-17: 5.60, Mar-17: 5.50, Apr-17: 5.49, May-17: 5.20, Jun-17: 5.52, Jul-17: 5.74, Aug-17: 5.29

Very Satisfied (Top Box) values: Oct-16: 26%, Nov-16: 25%, Dec-16: 21%, Jan-17: 24%, Feb-17: 29%, Mar-17: 32%, Apr-17: 31%, May-17: 24%, Jun-17: 27%, Jul-17: 26%, Aug-17: 17%

ACCOMMODATIONS –
Satisfaction by Category

Very Satisfied (Top Box) — MEAN (7pt Scale)
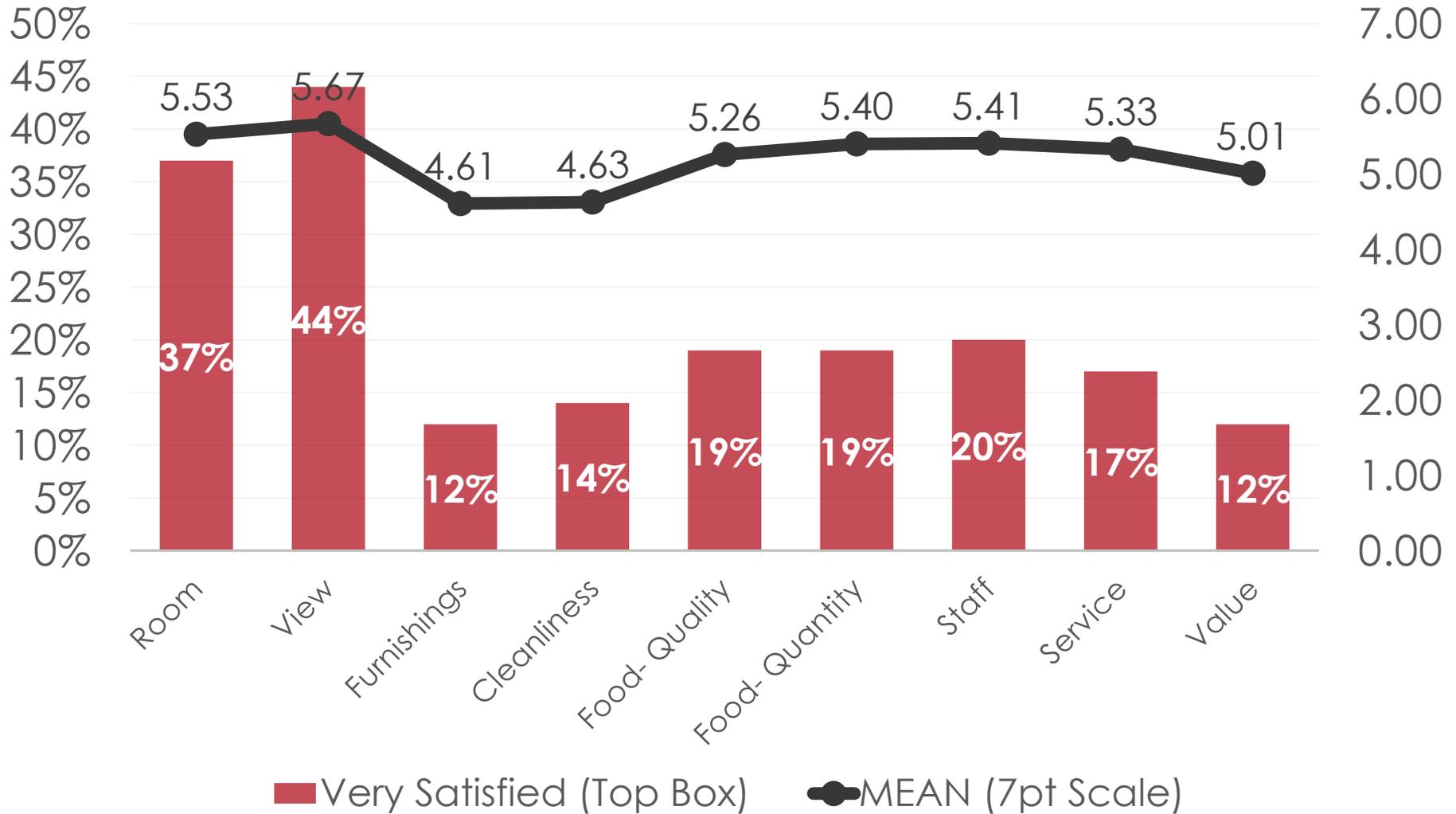
DINING EXPERIENCE (Outside Hotel) –
Satisfaction by Category

Furnishings: 14%, 4.49
Cleanliness: 18%, 4.87
Food-Quality: 18%, 5.13
Food-Quantity: 17%, 5.21
Staff: 14%, 5.16
Service: 16%, 5.24
Value: 14%, 4.81

Legend: Very Satisfied (Top Box) — MEAN (7pt Scale)

[A]
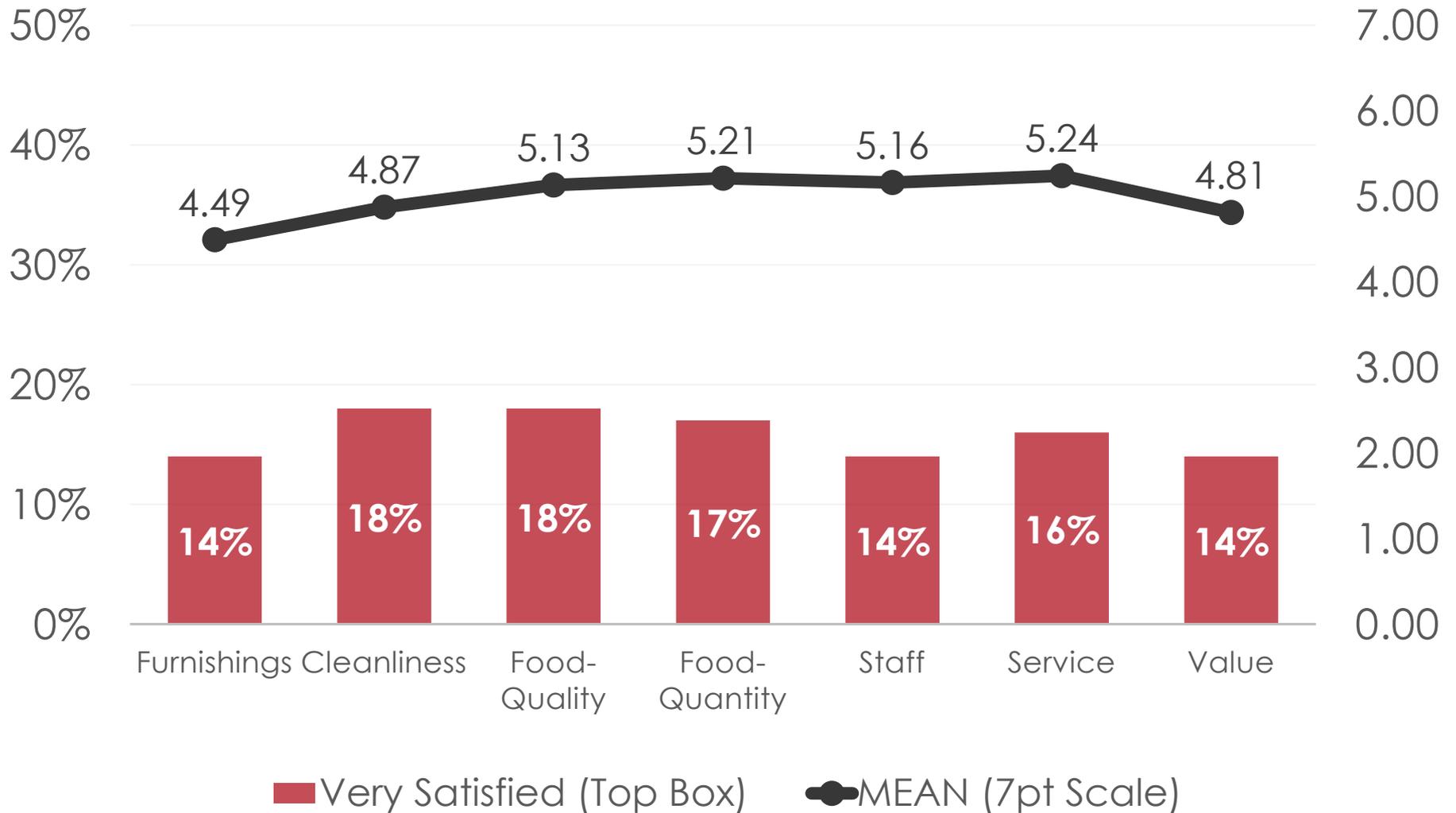
Shopping Malls/ Stores (Top Responses)

Bar chart showing top responses:
- DFS Galleria: 56%
- Guam Premium Outlet: 47%
- Ross: 35%
- ABC Store: 32%
- Micro Mall: 30%
- K-Mart: 25%
- Macys: 22%
- JP Super: 17%
- Tumon Sands: 11%
- The Plaza: 10%

[A]

SHOPPING - SATISFACTION

40%

30%   5.23   5.02

20%

10%   11%   11%

0%

QUALITY   VARIETY

■ Very Satisfied (Top Box)   ━●━ MEAN (7pt Scale)

7.00

6.00

5.00

4.00

3.00

2.00

1.00

0.00

[A]
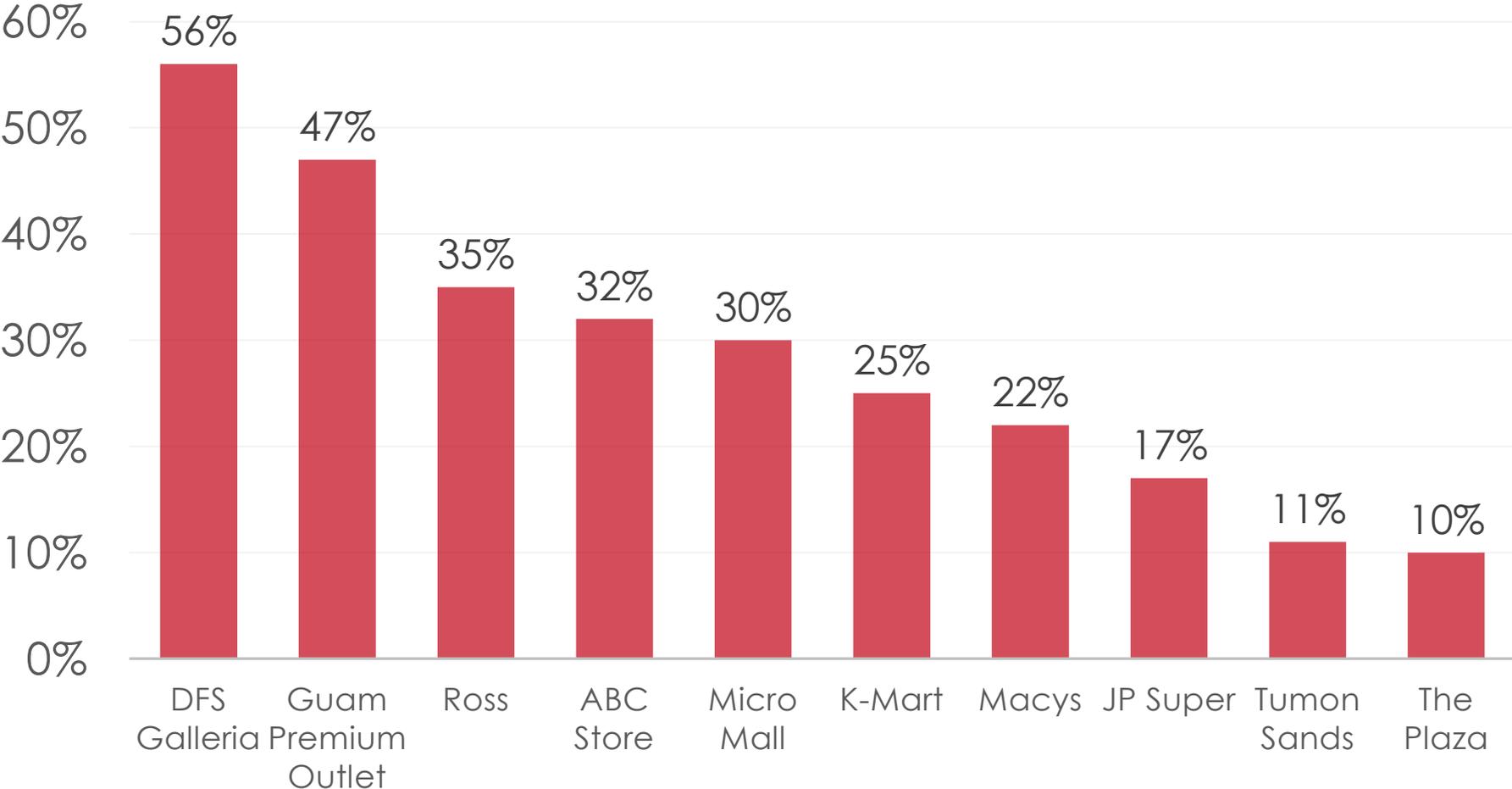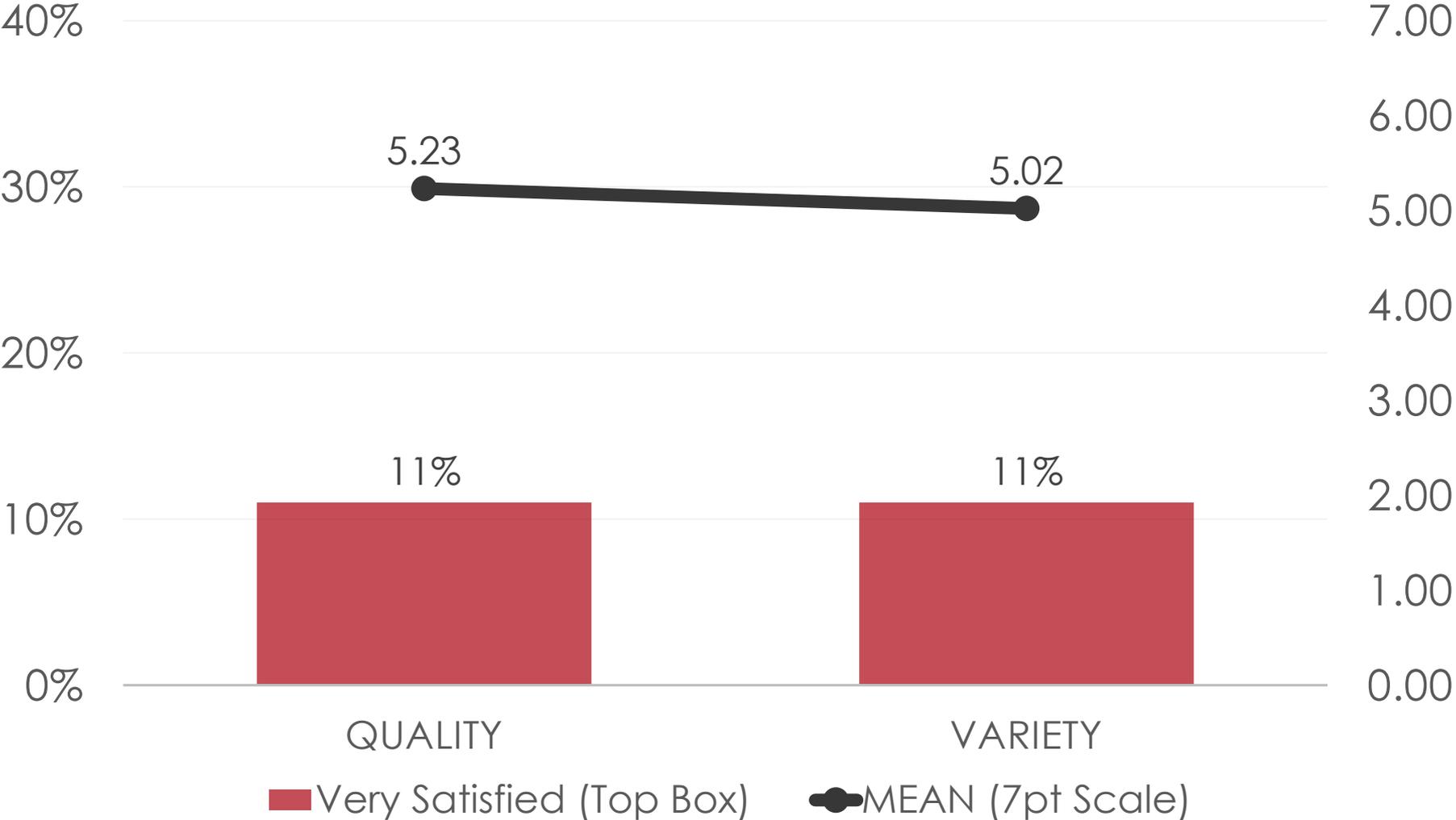
OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

Optional Tour Participation (Top Responses 5%+)

None of the optional tours tested were rated by at least 5% of those polled.

[A]
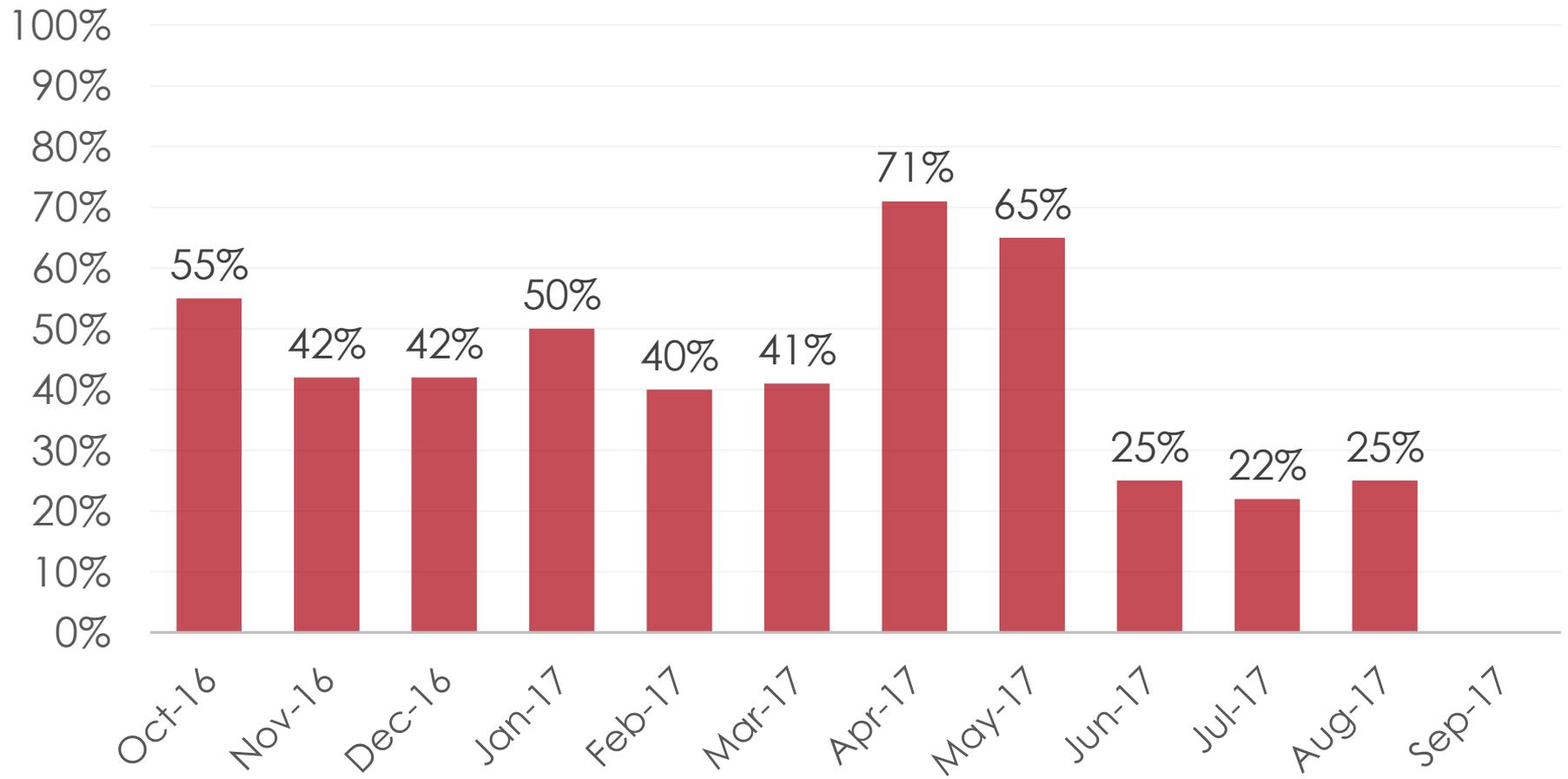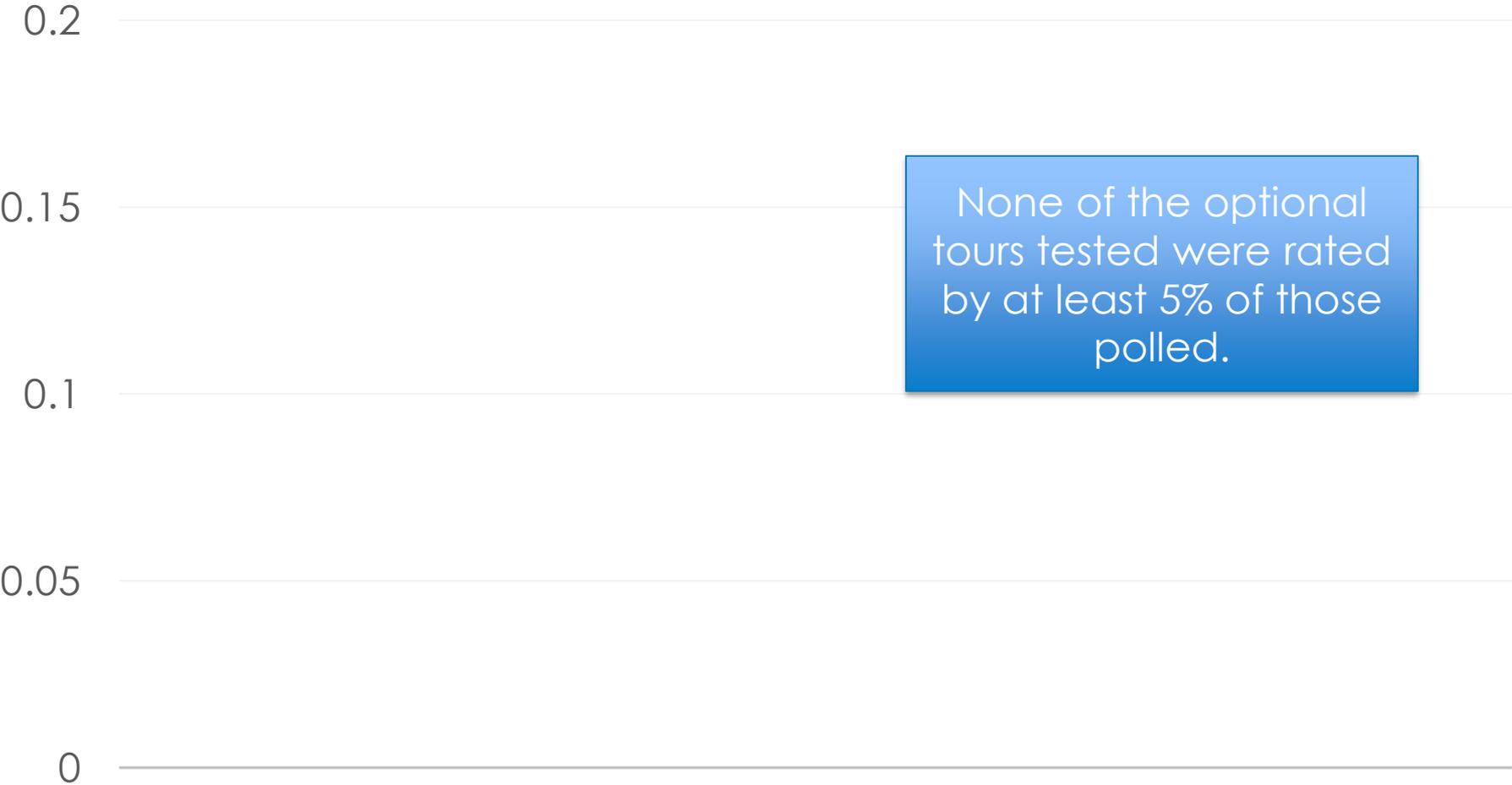
Optional Tour Satisfaction
Top Responses only - Participation (5%+)

Very Satisfied (Top Box)   MEAN (7pt Scale)

[A]

DAY TOUR - SATISFACTION

Chart showing Day Tour Satisfaction. Bars represent "Very Satisfied (Top Box)": QUALITY 25%, VARIETY 23%. Line represents MEAN (7pt Scale): QUALITY 5.43, VARIETY 5.29.

Legend: Very Satisfied (Top Box) — MEAN (7pt Scale)

[A]

NIGHT TOUR - SATISFACTION

Chart showing satisfaction for Night Tour. QUALITY: Very Satisfied (Top Box) 8%, MEAN (7pt Scale) 4.63. VARIETY: Very Satisfied (Top Box) 6%, MEAN (7pt Scale) 4.52.

Legend: Very Satisfied (Top Box) — MEAN (7pt Scale)

[A]

Activities Participation (Top Responses)

Activity	Percentage
Shopping	64%
Sightseeing	60%
Snorkle	45%
Dinner Show	24%
Water Park	20%
Beach Resort	18%
Parasail	16%
Dolphin Watch	16%
Scuba	12%
Two-Lovers Pt	11%
Jet Ski	9%
Windsurf	7%

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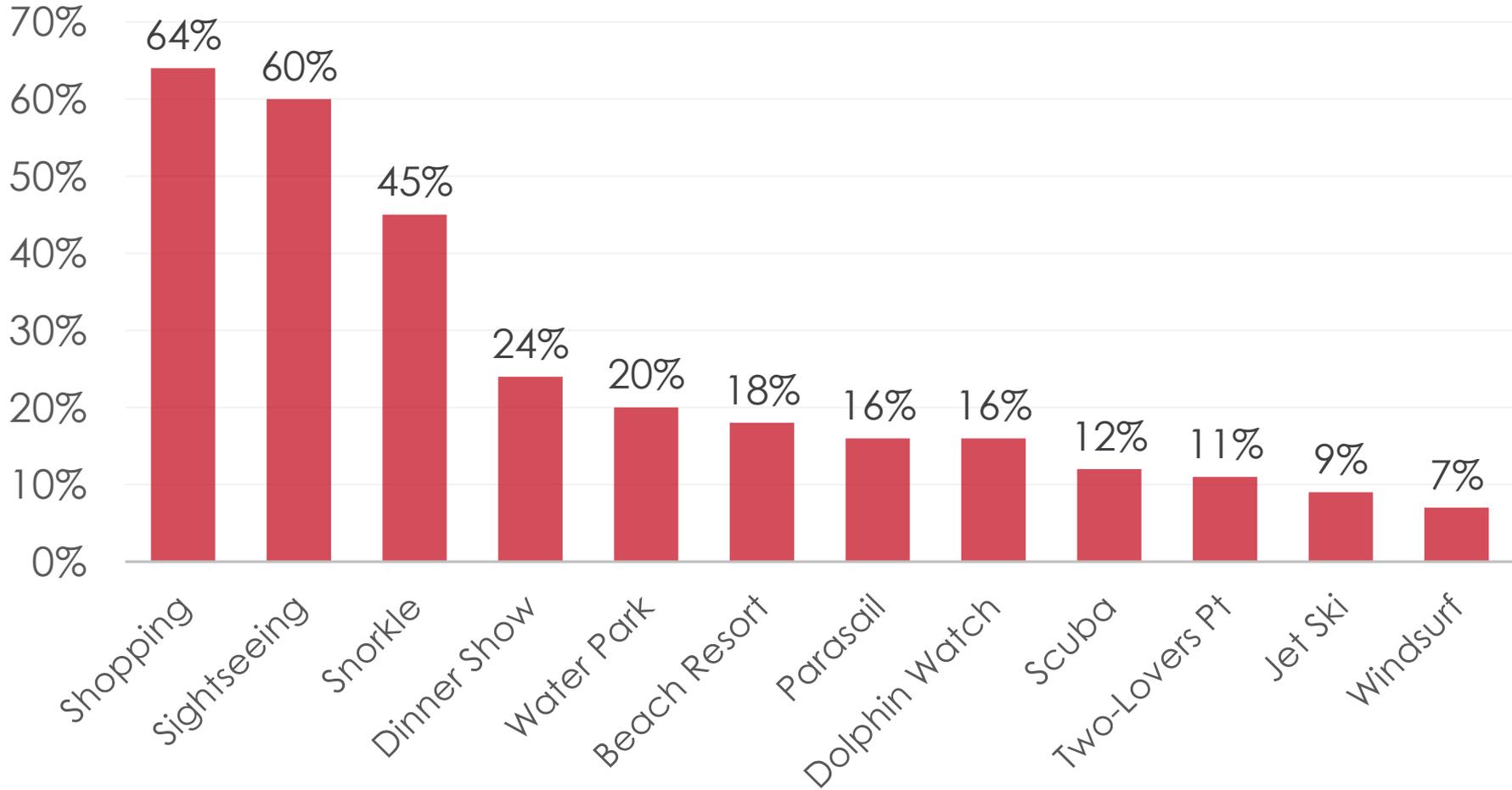
SECTION 5
PROMOTIONS

[A]

INTERNET- GUAM SOURCES OF INFORMATION

Bar chart showing Internet sources of information in Guam:
- Search Engines: 50%
- Blogs: 33%
- Social Networks: 15%
- Forums: 8%
- Q&A Sites: 7%
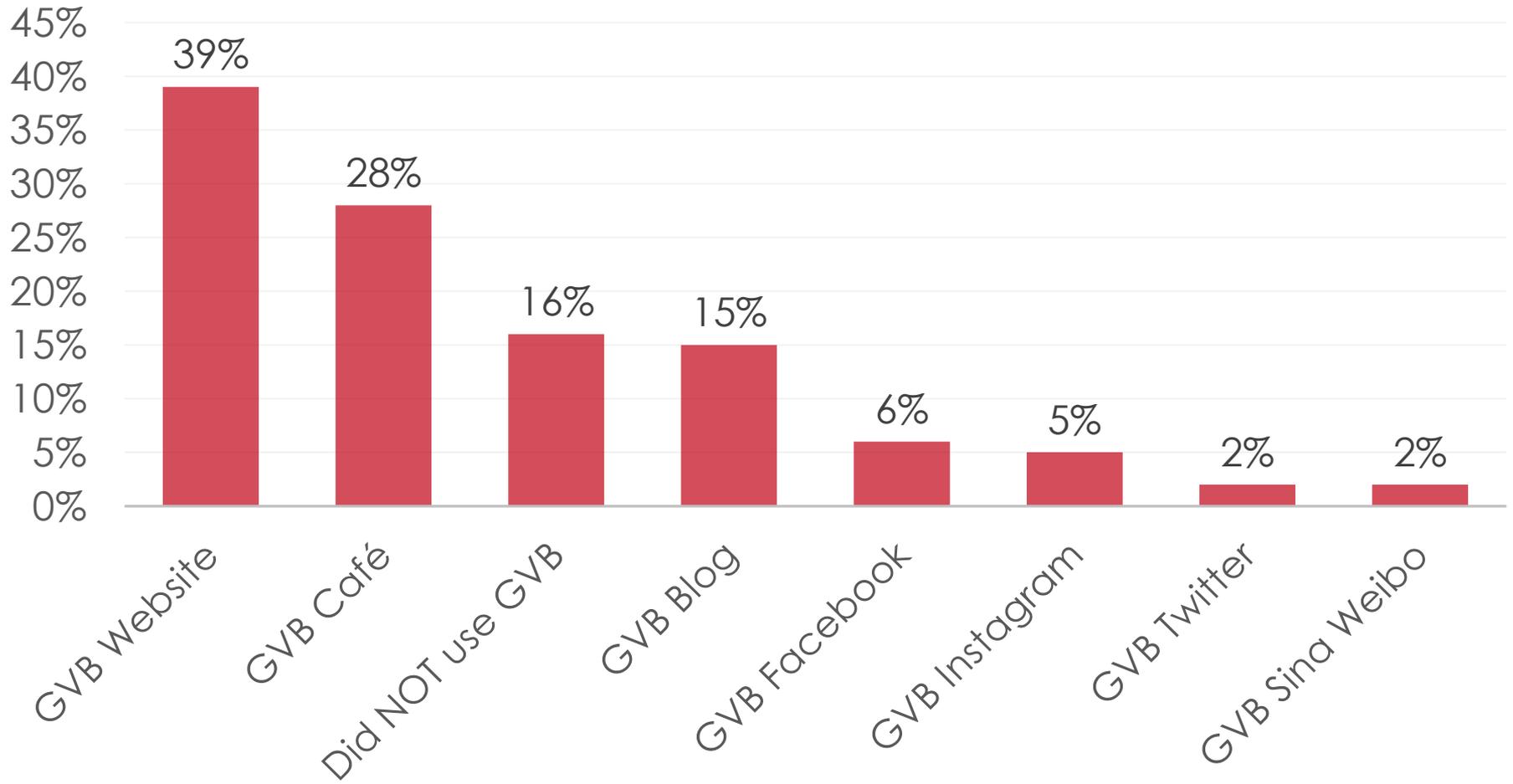- Did NOT use Internet: 4%

[A]
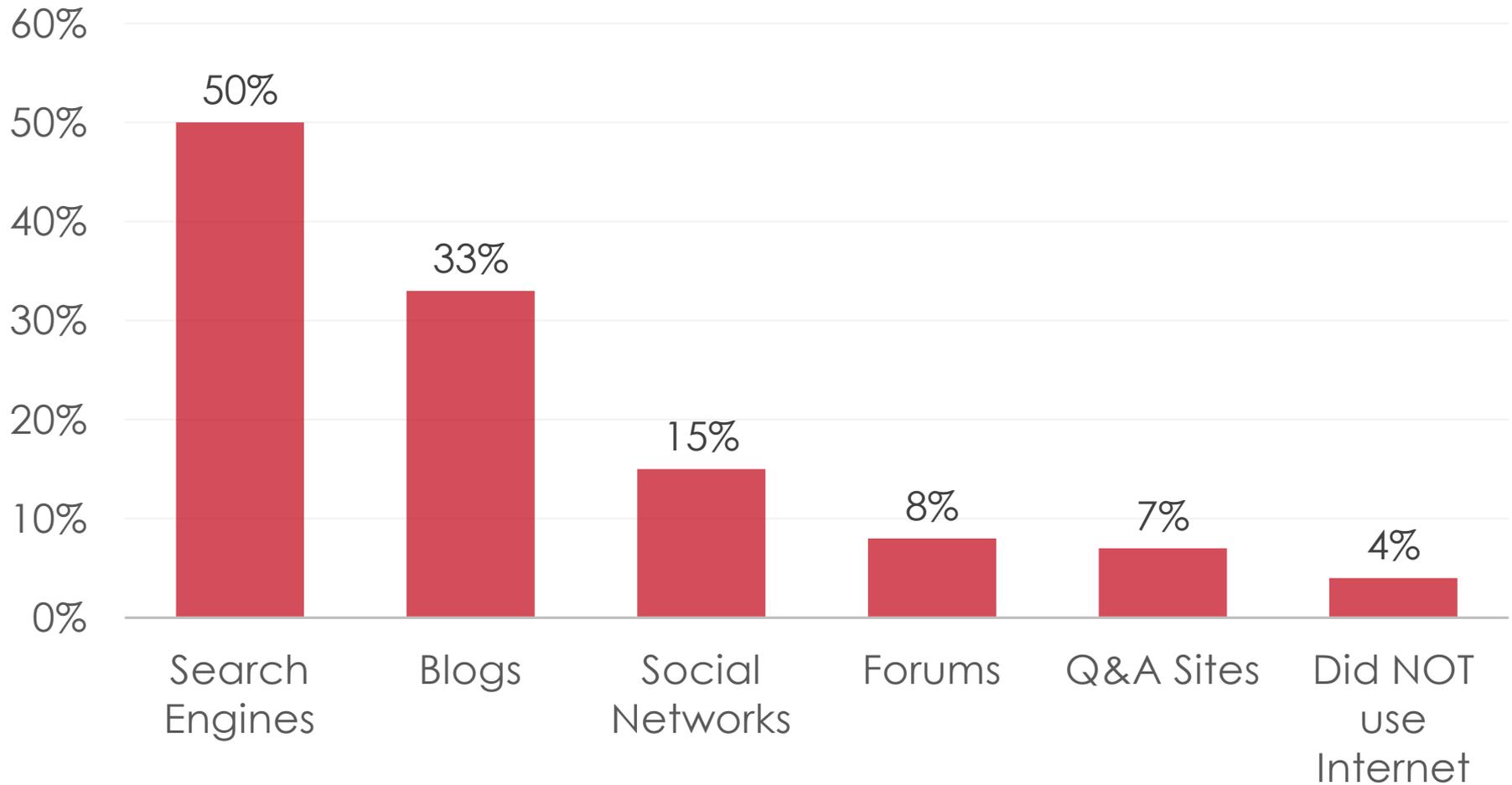
INTERNET- SOURCES OF INFORMATION
Things to do on Guam
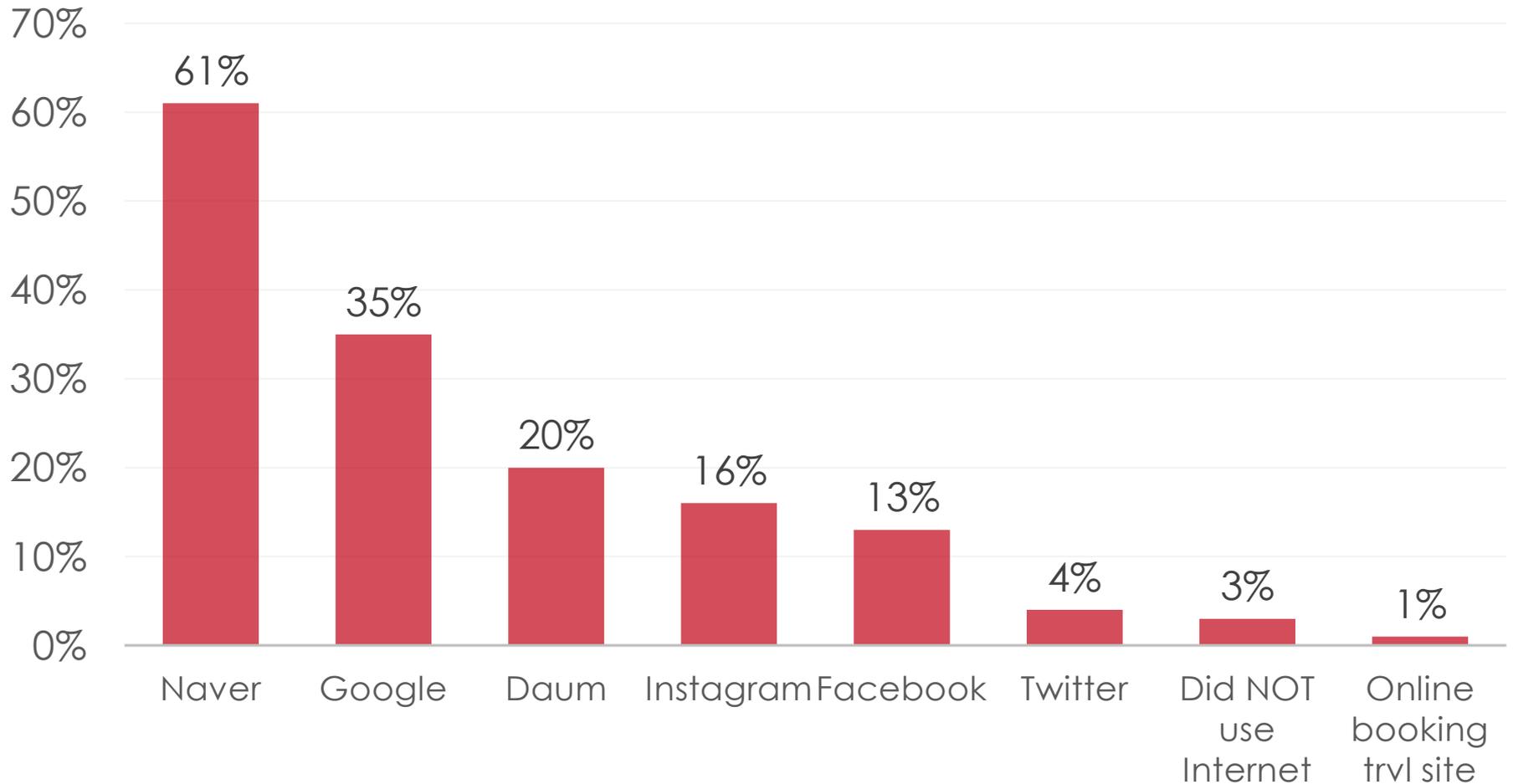
[A]

INTERNET- SOURCES OF INFORMATION GVB
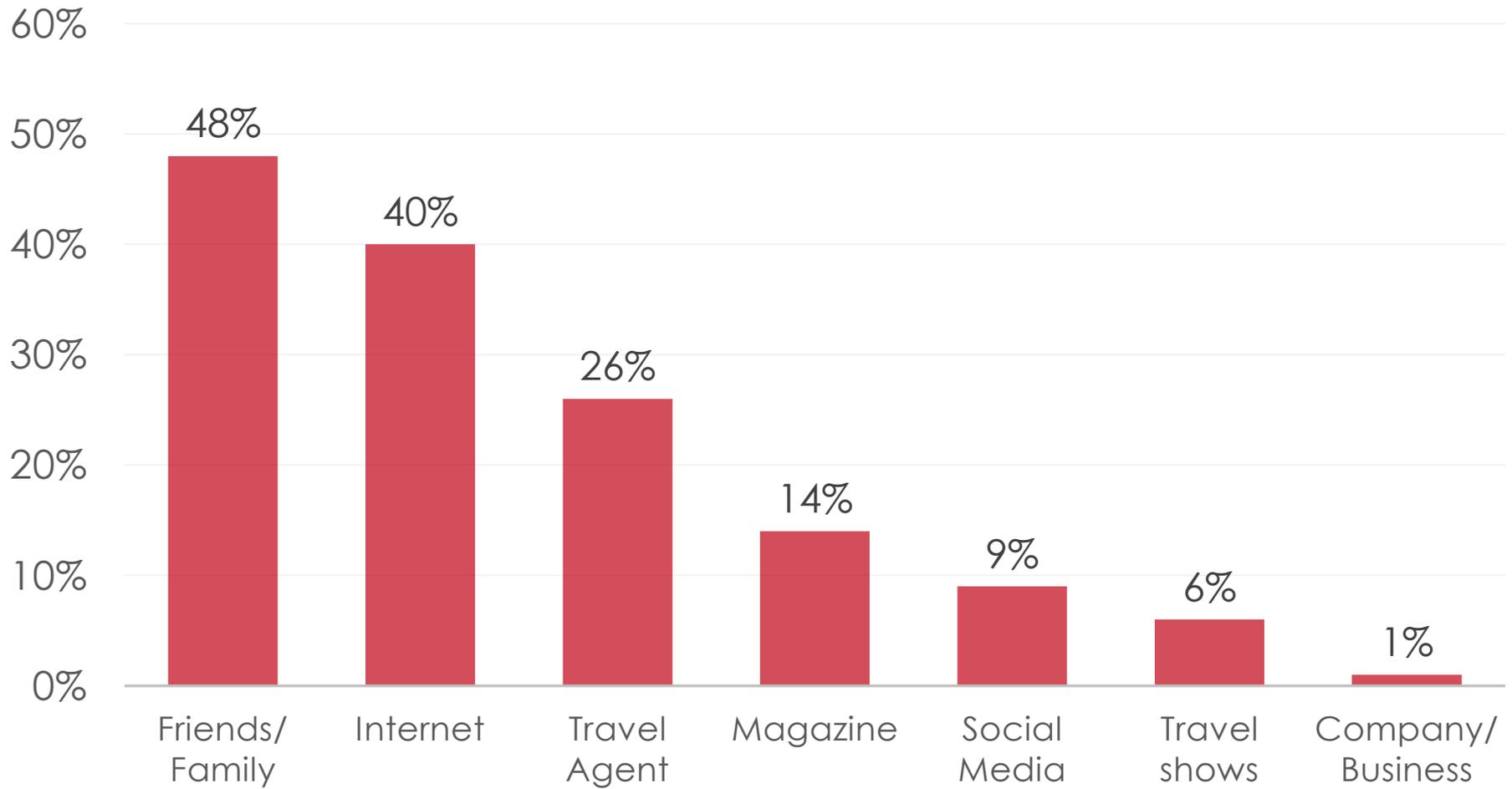
[A]

TRAVEL MOTIVATION

[A]

PRE-ARRIVAL SOURCES OF INFOMATION

Bar chart of pre-arrival sources of information:

- Internet/ App: 70%
- TV: 36%
- Friends/ Family: 36%
- GVB: 30%
- Trvl Ag Brochure: 26%
- Newspaper: 26%
- Guidebook: 16%
- Theater Ad: 14%
- GVB Promo: 10%
- Magazine: 9%

[A]
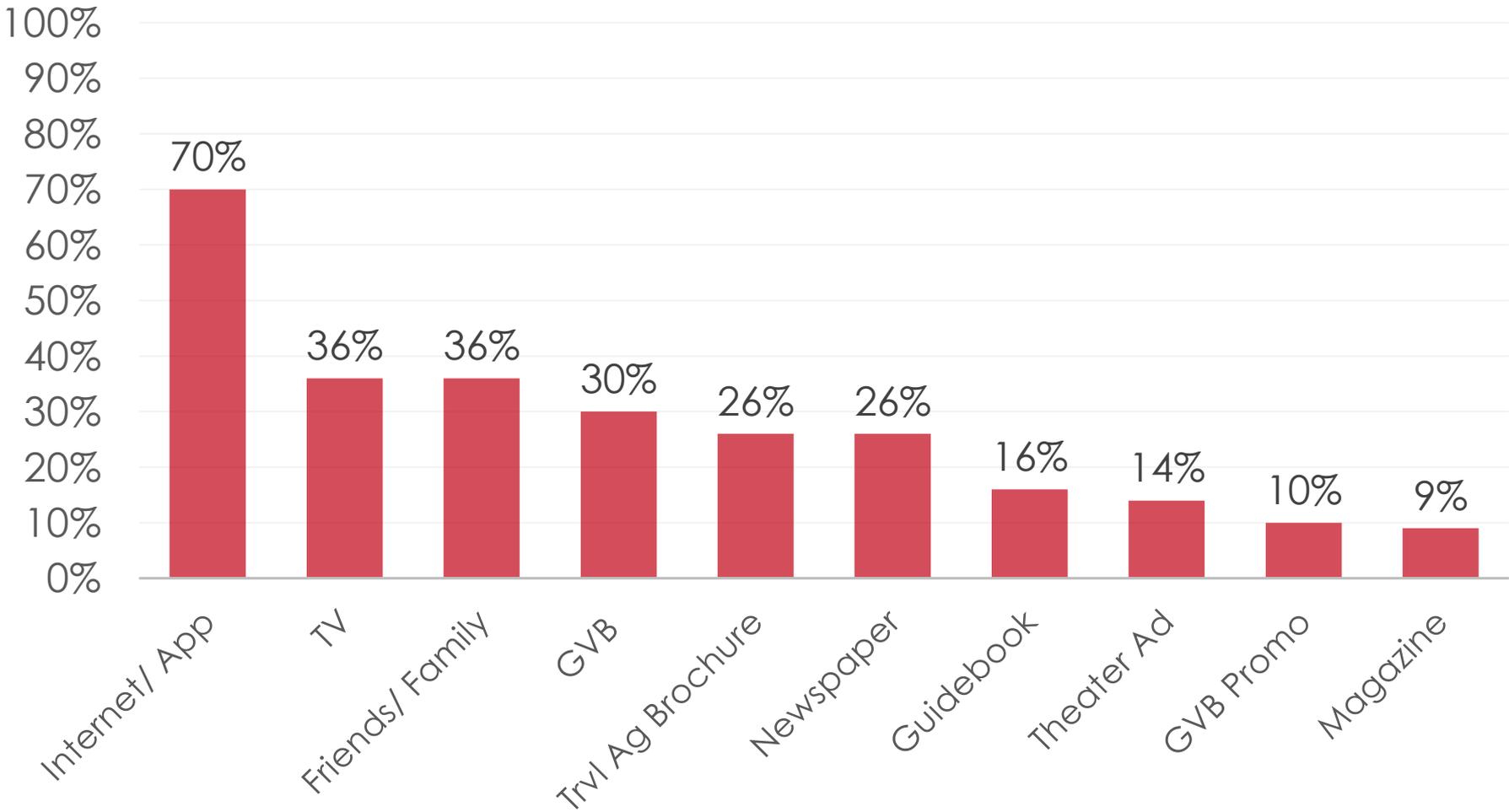
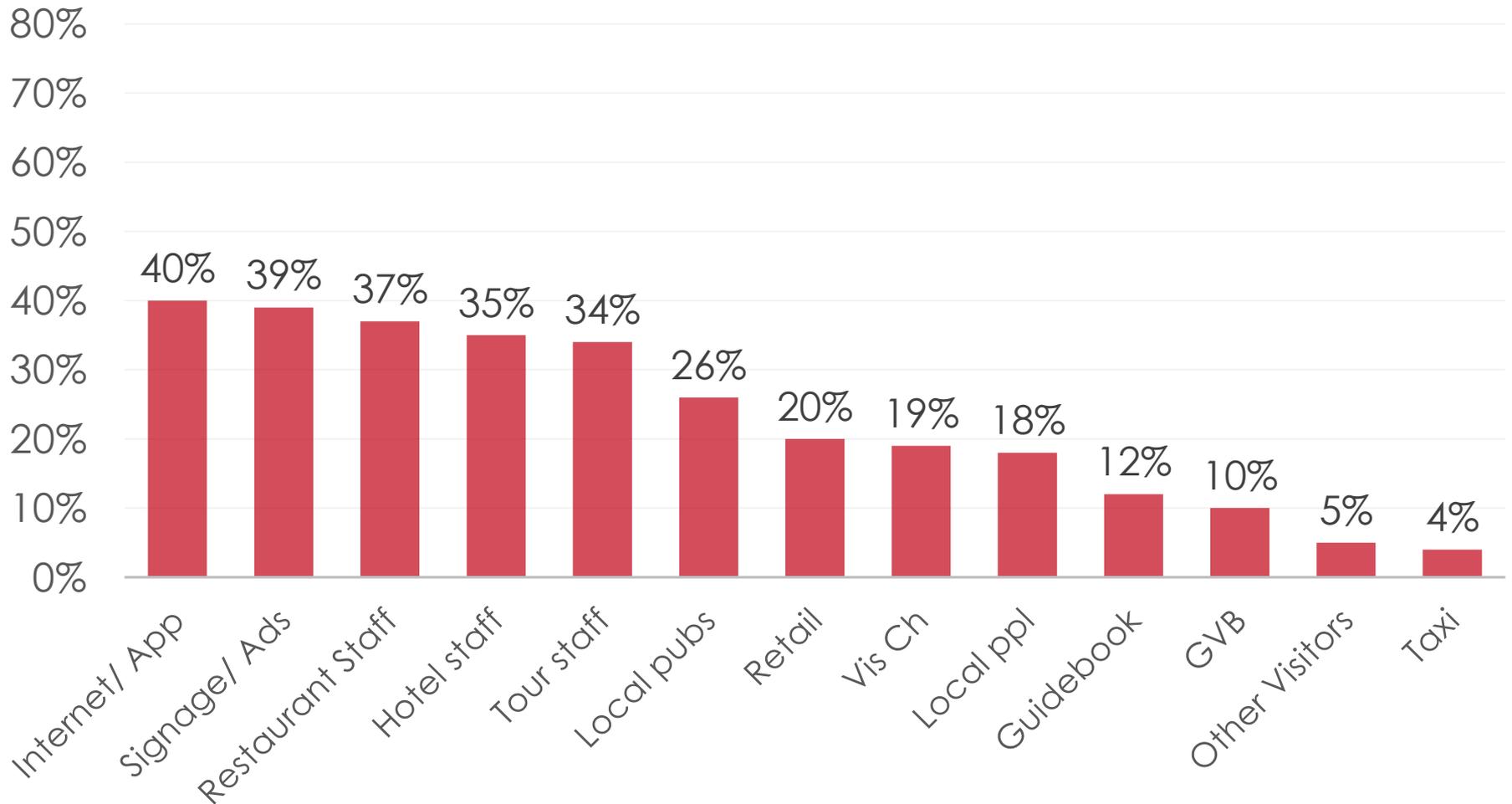# PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

GVB EXIT SURVEY

**Q1** Please select the top three sources of information you used to find out about Guam before your trip:

		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
Q1	Internet/Mobile App	70%	100%	100%		75%	43%	53%	65%	75%
	Friend or relative	36%	33%	20%		48%	9%	24%	28%	49%
	TV	36%		40%		35%	43%	24%	38%	35%
	Guam Visitors Bureau office	30%	33%	20%		21%	51%	29%	33%	27%
	Travel agent brochure	26%		80%		31%	14%	18%	29%	7%
	Newspaper	26%	67%	40%		22%	34%	20%	29%	11%
	Travel guide book at bookstores	16%				18%	9%	4%	13%	29%
	Theater ads	14%	33%			6%	34%	24%	16%	16%
	Guam Visitors Bureau promotional activities	10%				9%	24%	8%	10%	9%
	Magazine (consumer)	9%				14%		2%	9%	11%
	I have been to Guam before	9%				6%	9%	65%	9%	9%
	Co-worker/ company travel department	7%	33%			9%	4%	12%	8%	10%
	Travel trade shows	7%				4%	20%	14%	8%	8%
	Consumer travel shows	2%				1%	4%		3%	2%
	Total	364	3	5		205	74	49	317	132

Prepared by Anthology Research

ONISLE
SOURCES OF INFOMATION

Bar chart of sources of information:
- Internet/ App: 40%
- Signage/ Ads: 39%
- Restaurant Staff: 37%
- Hotel staff: 35%
- Tour staff: 34%
- Local pubs: 26%
- Retail: 20%
- Vis Ch: 19%
- Local ppl: 18%
- Guidebook: 12%
- GVB: 10%
- Other Visitors: 5%
- Taxi: 4%

[A]

ON-ISLE
SOURCES OF INFORMATION –
Key Segments

GVB EXIT SURVEY
Q2 Please select the top three sources of information you used to find out about Guam while you were here:

|		TOTAL	MICE	HONEYMOON	WEDDING	LEISURE	GROUP TOUR	REPEAT VISITOR	FAMILY	FIT
		-	-	-	-	-	-	-	-	-
Q2	Internet/Mobile App	40%	67%	40%		42%	31%	35%	34%	54%
	Signs/ advertisement	39%		80%		47%	23%	22%	38%	38%
	Restaurant staff (outside hotel)	37%	67%	20%		28%	68%	47%	41%	37%
	Hotel staff	35%	33%	20%		37%	41%	41%	37%	29%
	Tour staff	34%	33%	100%		42%	12%	24%	36%	17%
	Local publication	26%		20%		27%	20%	20%	25%	24%
	Retail staff	20%				15%	38%	33%	22%	22%
	Visitors channel	19%	33%	20%		12%	27%	20%	21%	17%
	Local people	18%	33%			18%	12%	31%	18%	17%
	Guide books I brought with me	12%				16%	3%	2%	8%	24%
	Guam Visitors Bureau	10%				6%	19%	14%	11%	11%
	Other visitors	5%				5%	5%	4%	5%	3%
	Taxi drivers	4%	33%			5%	1%	4%	3%	5%
	Total	363	3	5		204	74	49	316	132

Prepared by Anthology Research

SECTION 6
FUTURE TRAVEL TO GUAM

[A]

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

Yes
37%

No
63%

[A]
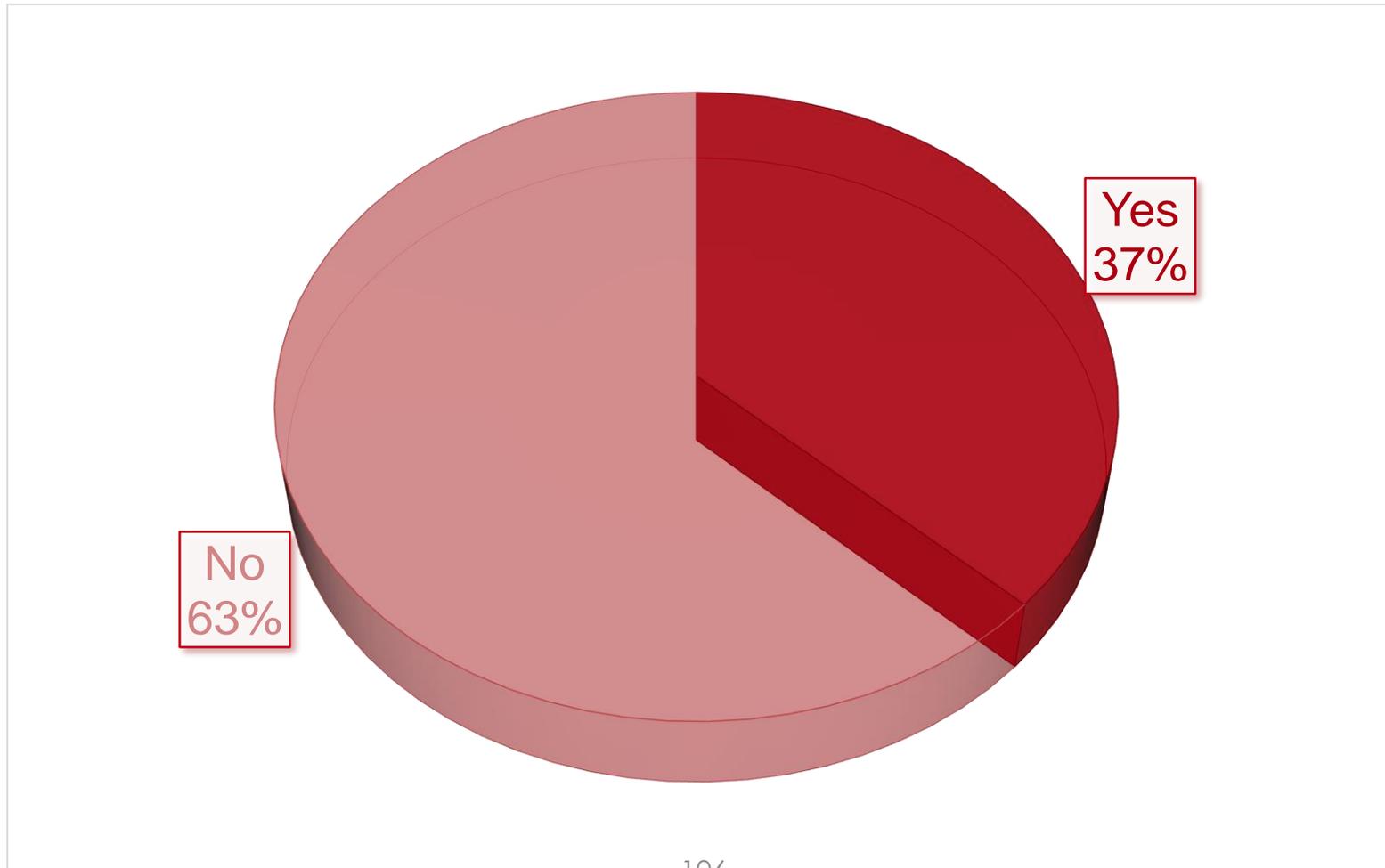
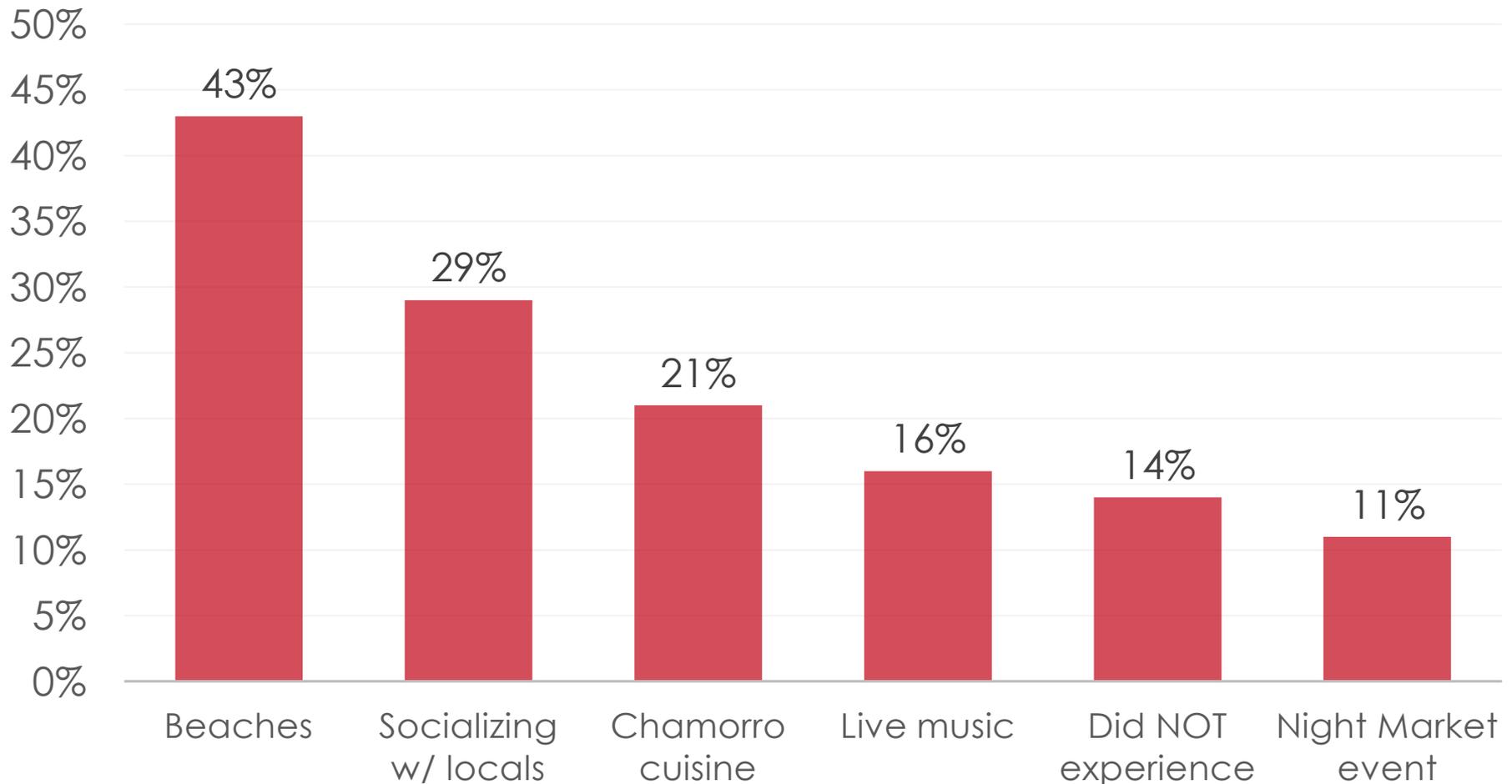# What would it take to make you stay an extra day on Guam?
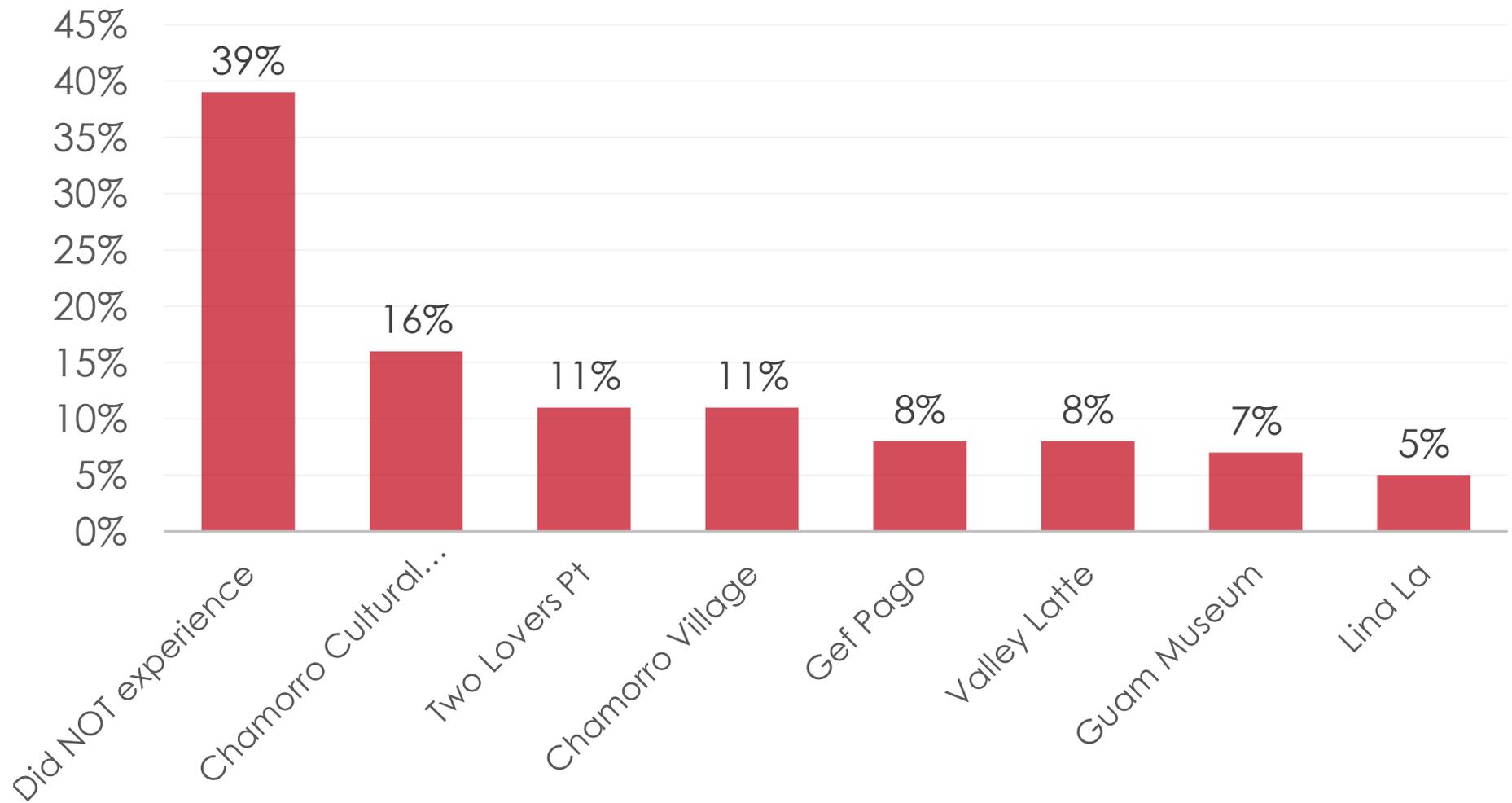
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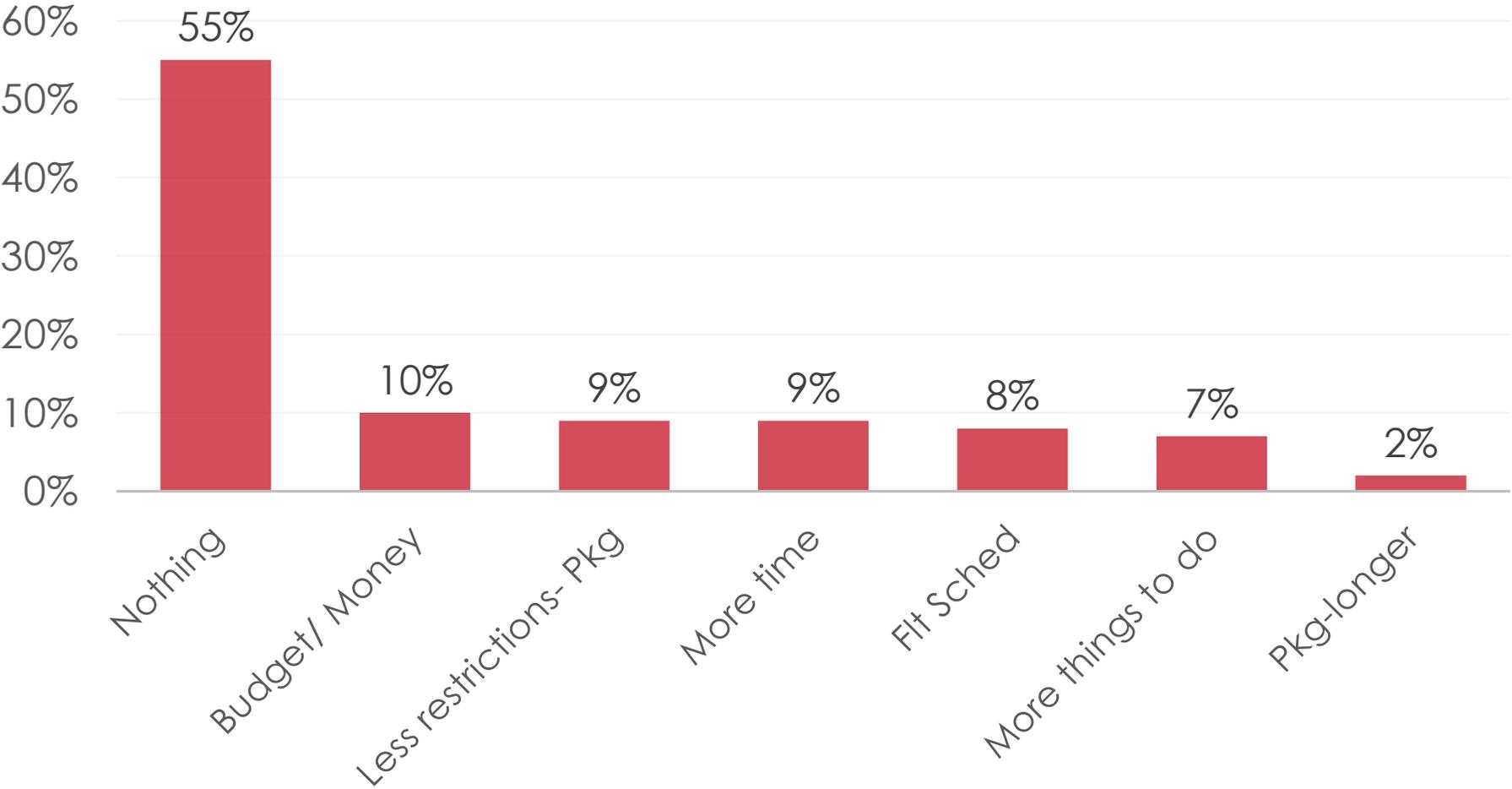
FUTURE TRAVEL CONCERNS

[A]
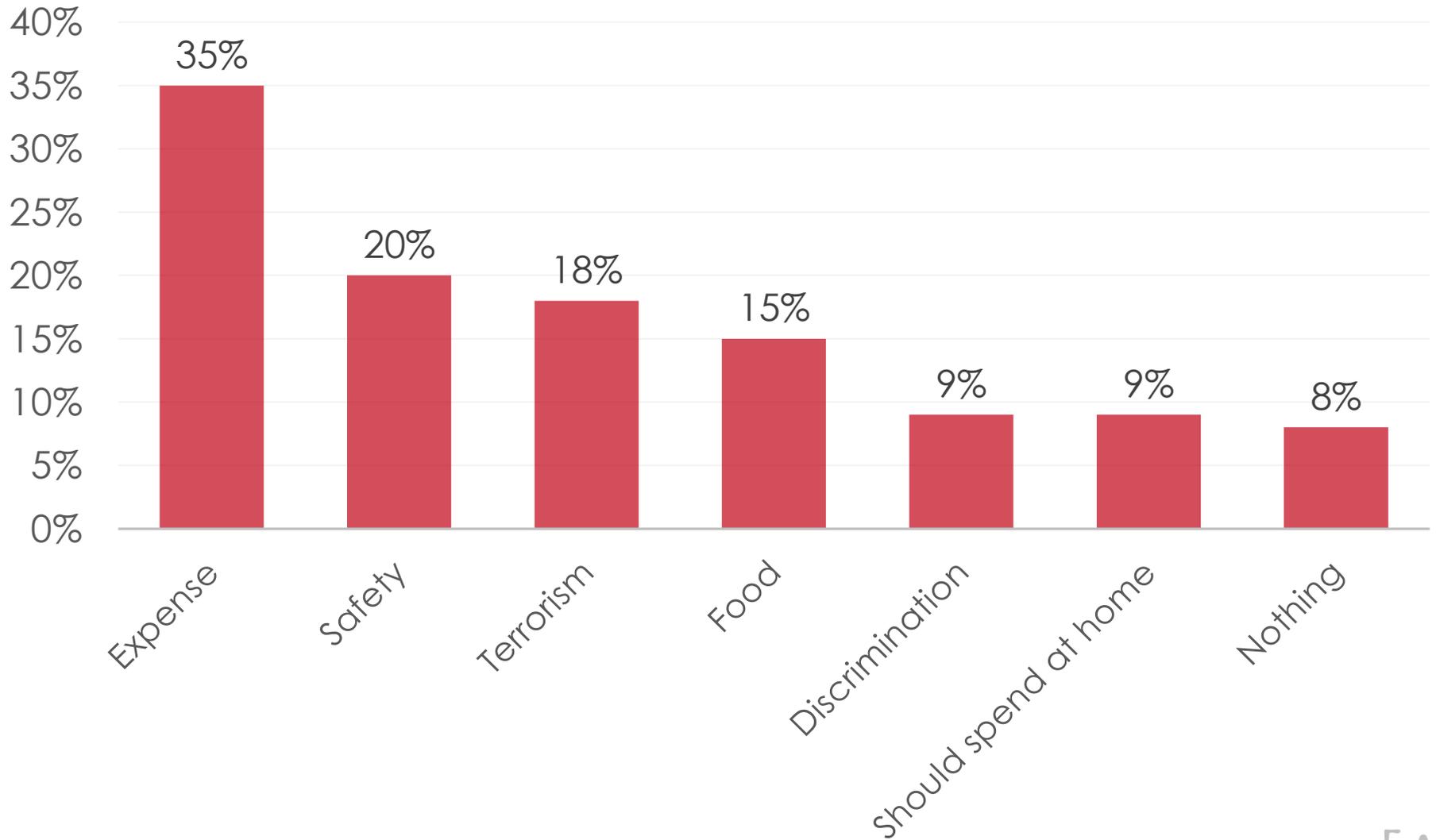
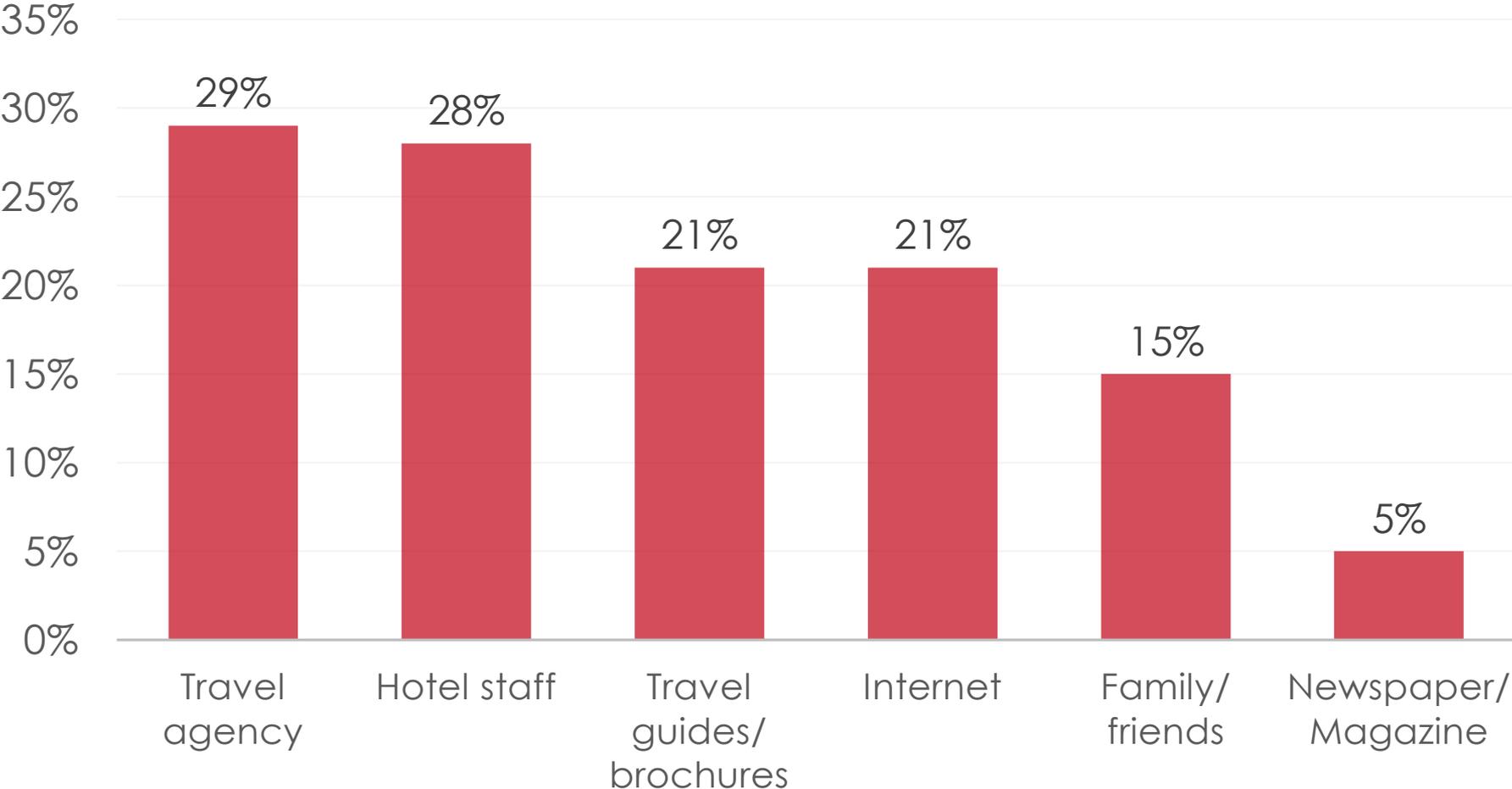# SECTION 7
GUAM CULTURE
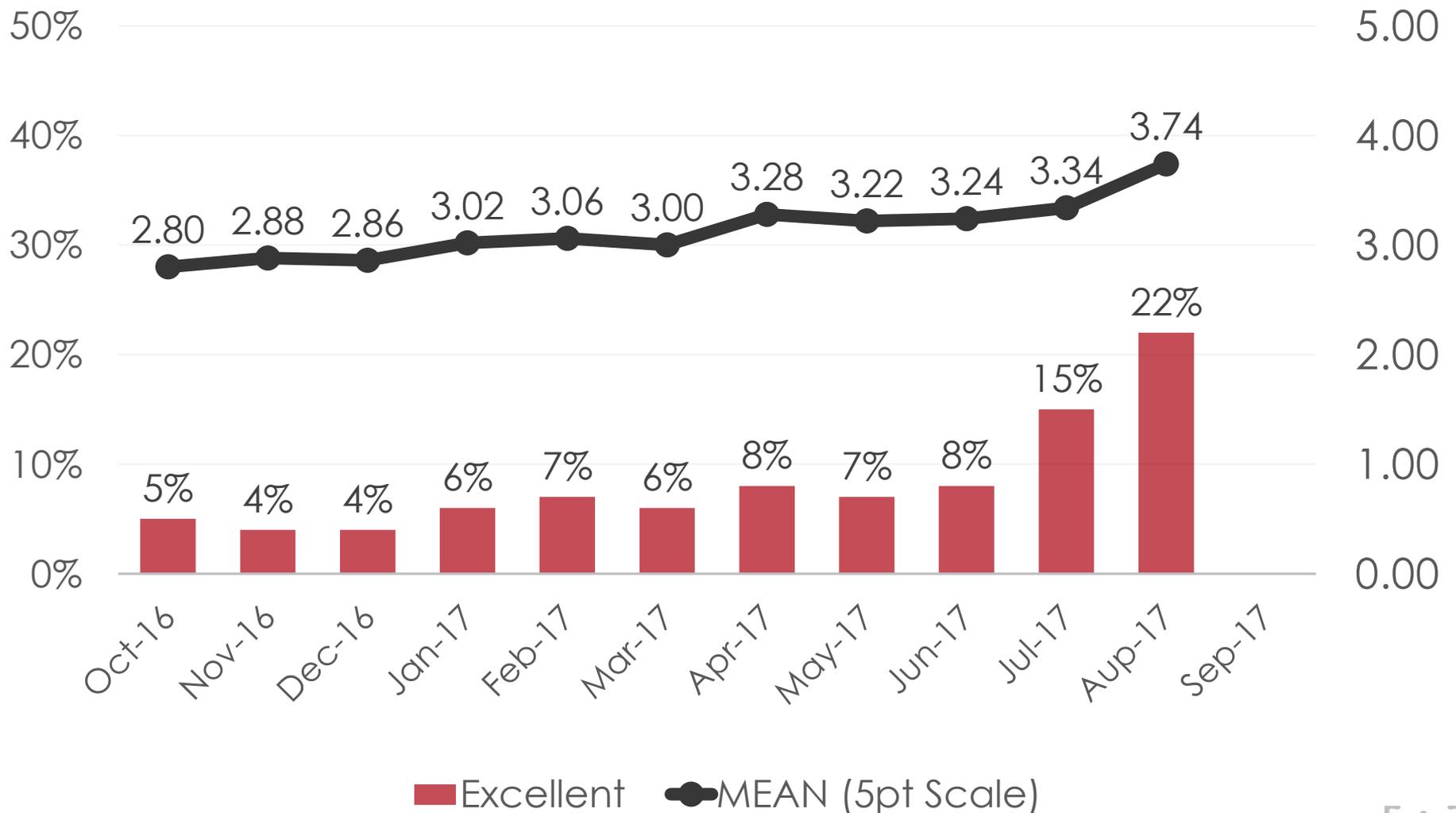
EXPERIENCED- CHAMORRO/ HAFA ADAI SPIRIT

[A]

EXPERIENCED-
OTHER CULTURAL ACTIVITY/EVENTS

[A]

SOURCES OF INFORMATION-CULTURAL ACTIVITY/EVENTS

[A]

SATISFACTION- CULTURAL ACTIVITY/EVENTS

Legend: Excellent — MEAN (5pt Scale)

[A]

OBSTACLES-
CULTURAL ACTIVITY/EVENTS

[A]
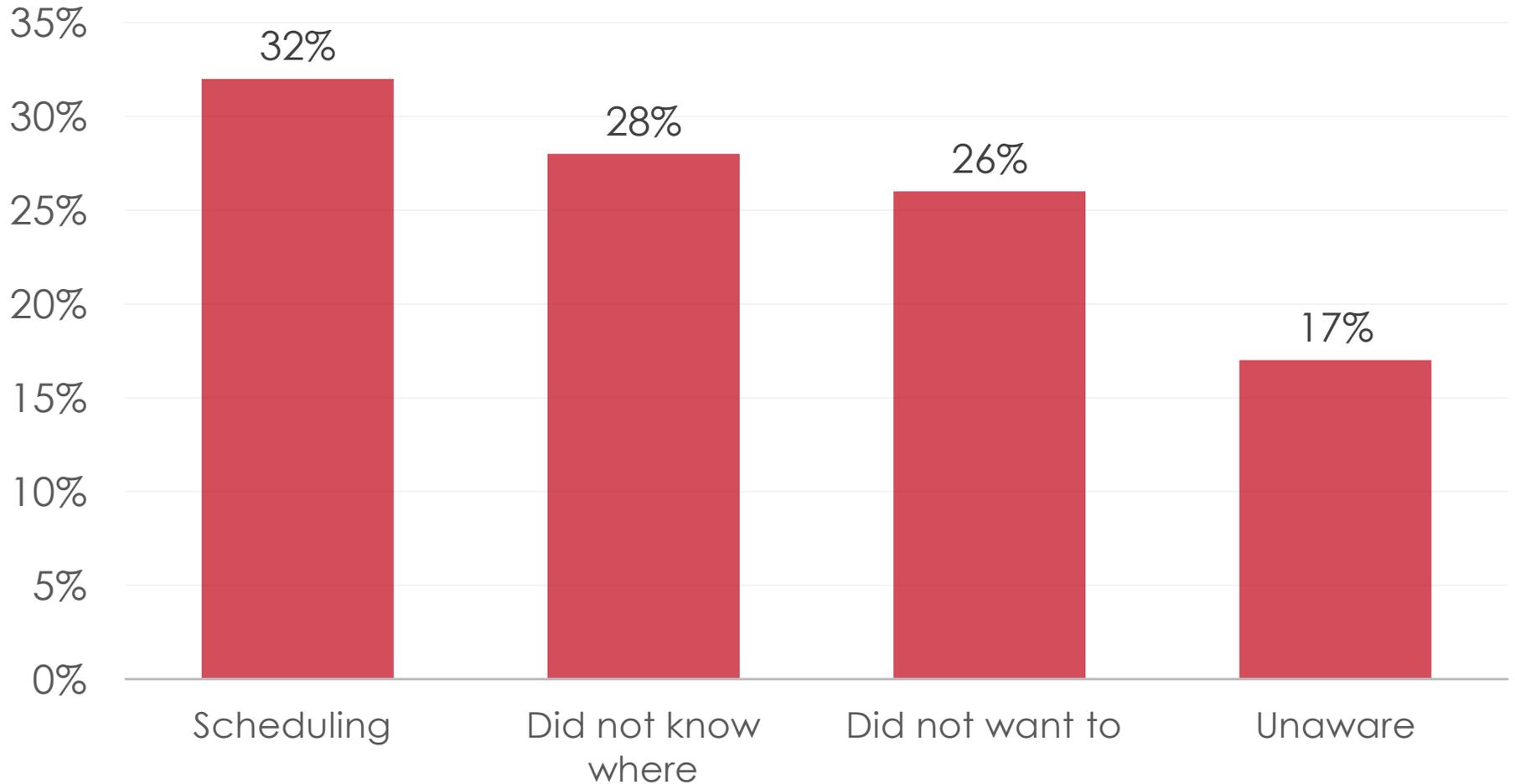
SECTION 7
ADVANCED STATISTICS

[A]

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.

[A]

Drivers- Overall Satisfaction

Comparison of Drivers of Overall Satisfaction, Oct, Nov, Dec 2016, Jan, Feb, Mar, Apr, May, Jun, Jul, Aug 2017, and Overall Oct 2016 - Aug 2017												
Drivers:	Oct-16 rank	Nov-16 rank	Dec-16 rank	Jan-17 rank	Feb-17 rank	Mar-17 rank	Apr-17 rank	May-17 rank	Jun-17 rank	Jul-17 rank	**Aug-17 rank**	Combined Oct 2016 - Aug 2017 rank
Quality & Cleanliness of beaches & parks	3	3		3	6						**2**	5
Ease of getting around			4									
Safety walking around at night	7									4		10
Quality of daytime tours			3		2					1		2
Variety of daytime tours						3			2			
Quality of nighttime tours							2	4				
Variety of nighttime tours											**3**	11
Quality of shopping			6	2			5					8
Variety of shopping	6					7						
Price of things on Guam						6						
Quality of hotel accommodations	4	4			4			2	4	3	**4**	4
Quality/cleanliness of air, sky						4	3	6	3			7
Quality/cleanliness of parks	1				5					2		
Quality of landscape in Tumon		2	1	1	1	1	1					1
Quality of landscape in Guam			5	4		5		1			**1**	9
Quality of ground handler	5		2				4	5	5			6
Quality/cleanliness of transportation vehicles	2	1			3	2		3	1	5	**5**	3
% of Per Person On Island Expenditures Accounted For	64.0%	61.8%	44.1%	40.8%	57.5%	56.1%	45.3%	50.2%	42.7%	47.3%	**29.8%**	48.6%
NOTE: Only significant drivers are included.												

[A]

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by five significant factors in the August 2017 Period. By rank order they are:
  - **Quality of landscape in Guam,**
  - **Quality & cleanliness of beaches & parks,**
  - **Variety of night time tours,**
  - **Quality of hotel accommodations, and**
  - **Quality/cleanliness of transportation vehicles.**

- With all five factors the overall r^2 is .298 meaning that **29.8% of overall satisfaction is accounted for by these factors.**

[A]

Drivers – On-Isle Expenditures

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2016, Jan, Feb, Mar, Apr, May, Jun, Jul, Aug 2017 and Overall Oct 2016-Aug 2017												
Drivers:	Oct-16 rank	Nov-16 rank	Dec-16 rank	Jan-17 rank	Feb-17 rank	Mar-17 rank	Apr-17 rank	May-17 rank	Jun-17 rank	Jul-17 rank	**Aug-17 rank**	Combined Oct 2016-Aug 2017 rank
Quality & Cleanliness of beaches & parks	1										**1**	
Ease of getting around		2								3		
Safety walking around at night												
Quality of daytime tours												
Variety of daytime tours								1			**2**	
Quality of nighttime tours												
Variety of nighttime tours												2
Quality of shopping		3								1		3
Variety of shopping												
Price of things on Guam		1										4
Quality of hotel accommodations					1							
Quality/cleanliness of air, sky						1			1			
Quality/cleanliness of parks												
Quality of landscape in Tumon												
Quality of landscape in Guam												
Quality of ground handler	2									2		
Quality/cleanliness of transportation vehicles												1
% of Per Person On Island Expenditures Accounted For	5.9%	7.2%	0.0%	0.0%	2.0%	1.5%	0.0%	2.6%	1.4%	9.8%	**12.9%**	0.9%

NOTE: Only significant drivers are included.

[A]

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Korean visitors on Guam is driven by two significant factors in the August 2017 period. By rank order they are:
  - **Quality & cleanliness of beaches & parks, and**
  - **Variety of day time tours.**
- With these factors the overall r^2 is .129 meaning that **12.9% of per person on island expenditure is accounted for by these factors.**

[A]