Guam Visitors Bureau

Korean Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

MARCH 2017

Prepared by: Anthology Research

VISIT
GUAM
2017
YEAR 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 **350** 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 **350** is +/- 5.23 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 +/- 5.23 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.

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Key Highlighted Segments

- **The specific objectives were:**

  - To determine the relative size and expenditure behavior of the following market segments:
    - Families (Q6)
    - FITS (Q7)
    - 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 (Q7)
    - Repeat Visitor (Q3A)

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

  - To identify (for all Korean visitors) the most important determinants of on-island spending
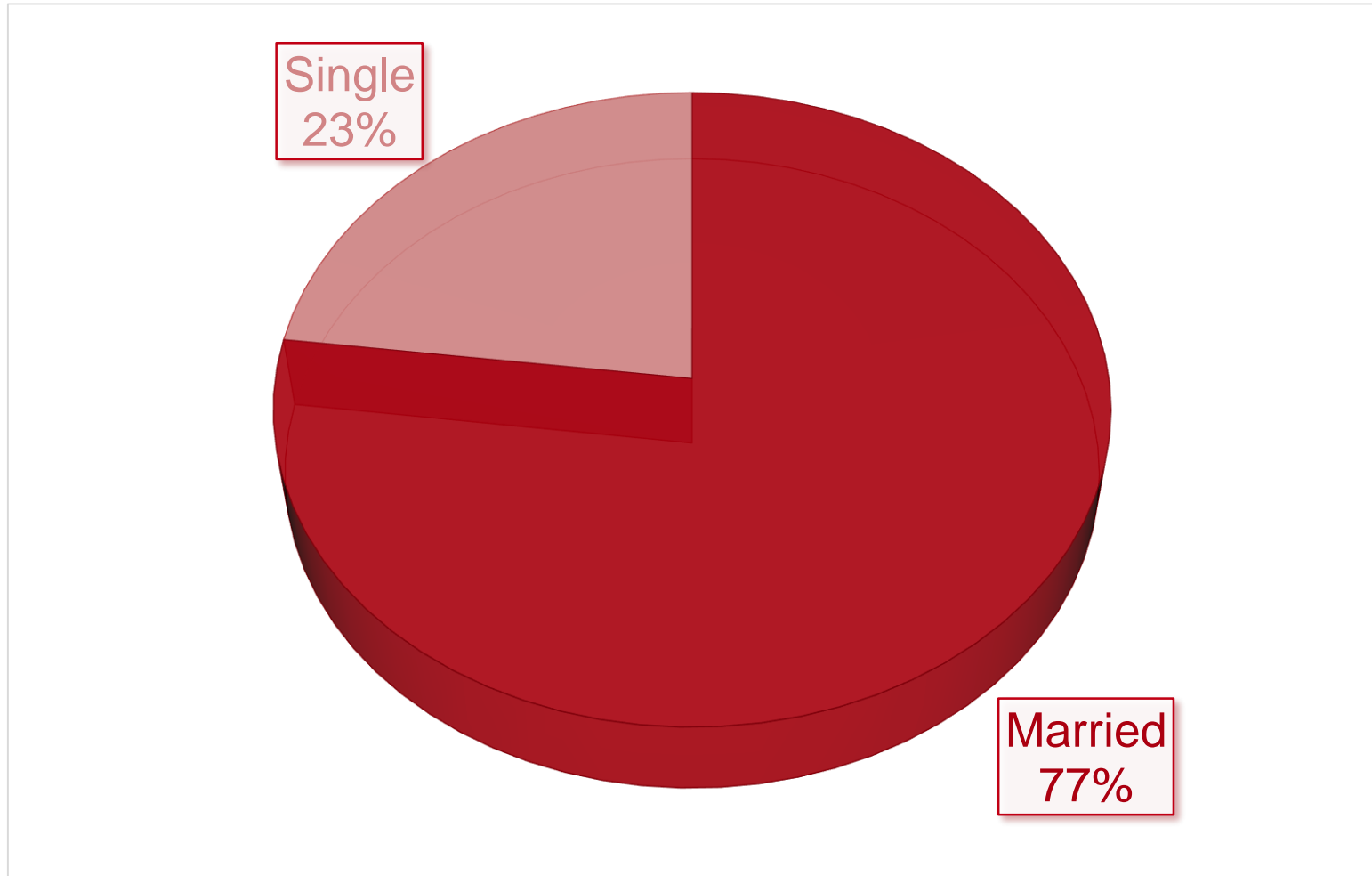
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Key Highlighted Segments
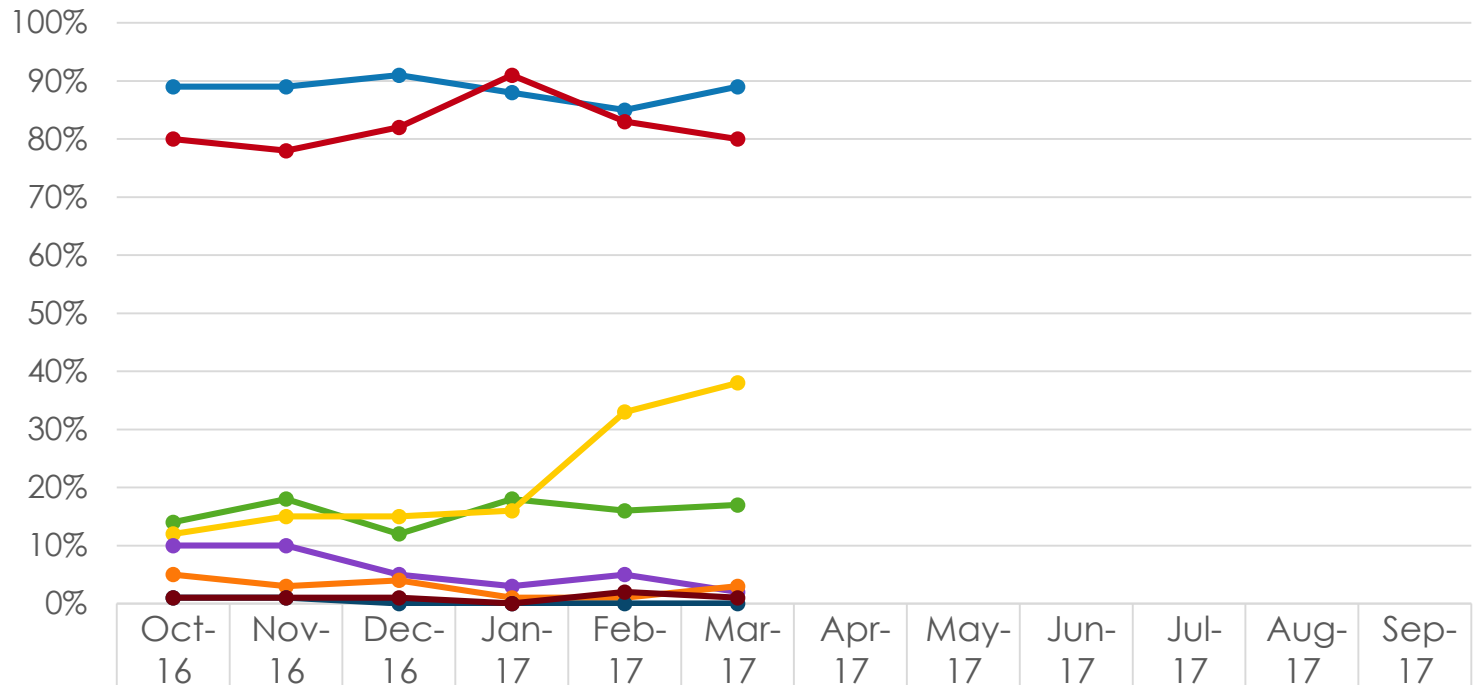
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Leisure Traveler	89%	89%	91%	88%	85%	89%						
Family	80%	78%	82%	91%	83%	80%						
Repeat	14%	18%	12%	18%	16%	17%						
FIT	12%	15%	15%	16%	33%	38%						
Honey-moon	10%	10%	5%	3%	5%	2%						
MICE	5%	3%	4%	1%	1%	3%						
Wedding	1%	1%	0%	0%	0%	0%						
Group	1%	1%	1%	0%	2%	1%						

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SECTION 1
PROFILE OF RESPONDENTS

[A]

Marital Status

Single
23%

Married
77%

[A]

Marital status – FY2017 Tracking
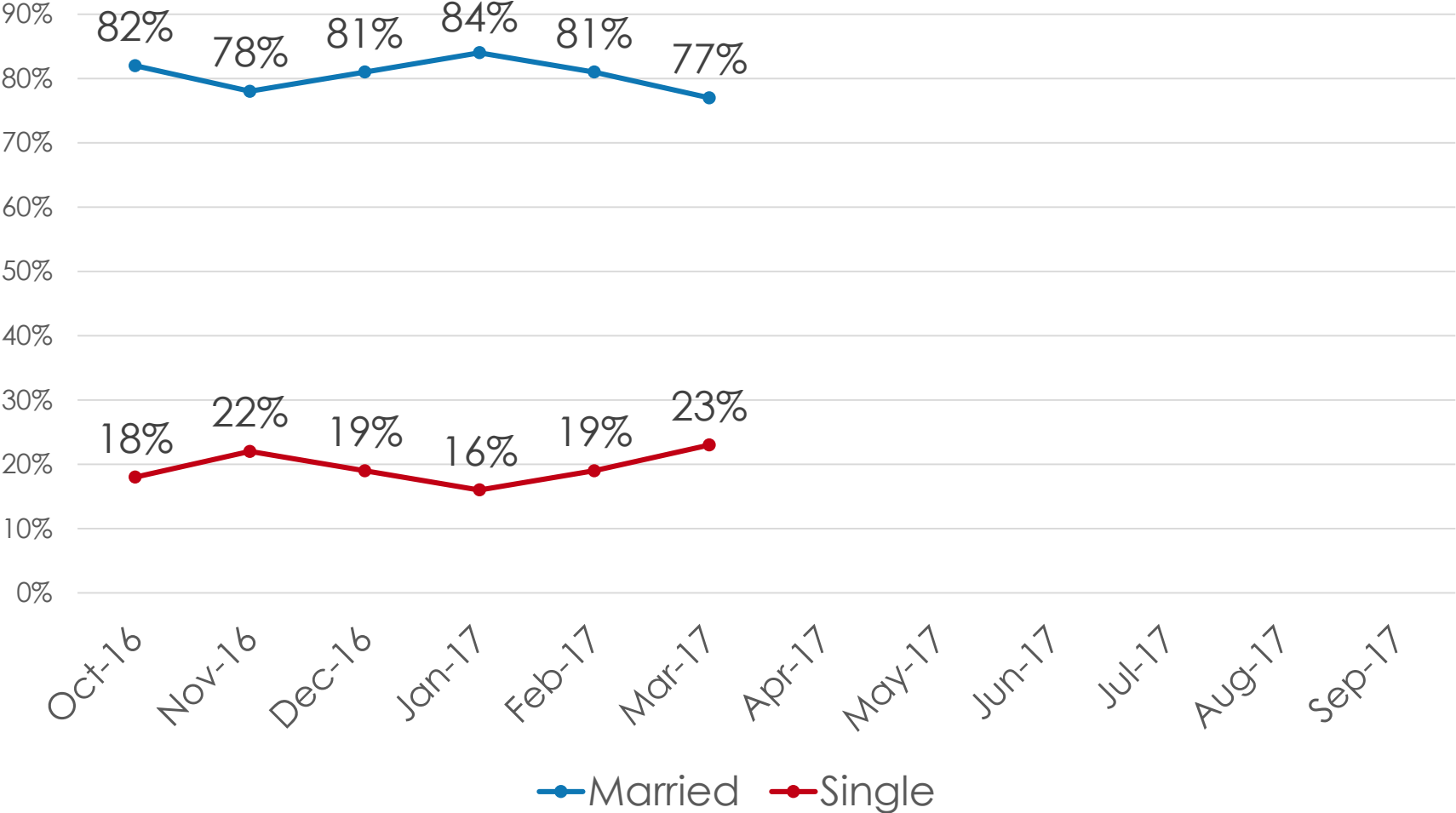
Marital status – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

QE Are you married or single?

		TOTAL	FIT	MICE	HONEY-MOON	WEDDING	LEISURE TRAVELER	FAMILY	GROUP TOUR	REPEAT VISITOR
		-	-	-	-	-	-	-	-	-
QE	Married	77%	73%	67%	100%		78%	91%	40%	78%
	Single	23%	27%	33%		100%	22%	9%	60%	22%
	Total	350	132	9	7	1	312	280	5	60

Prepared by QMark Research

[A]

Age

MEAN = 36.44
MEDIAN = 35

- 18-24: 3%
- 25-39: 71%
- 40-49: 17%
- 50-59: 5%
- 60+: 5%

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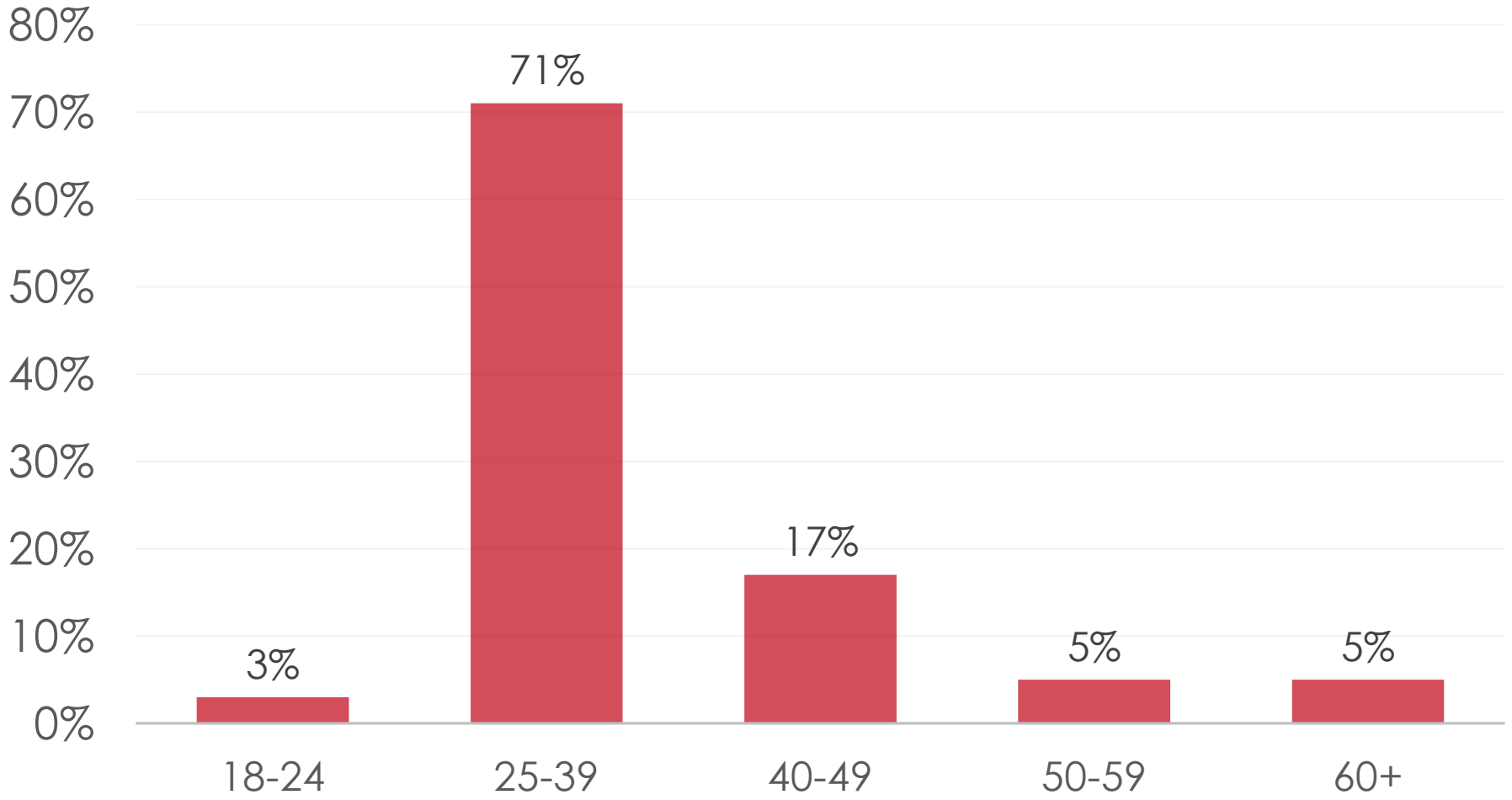
Age – FY2017 Tracking
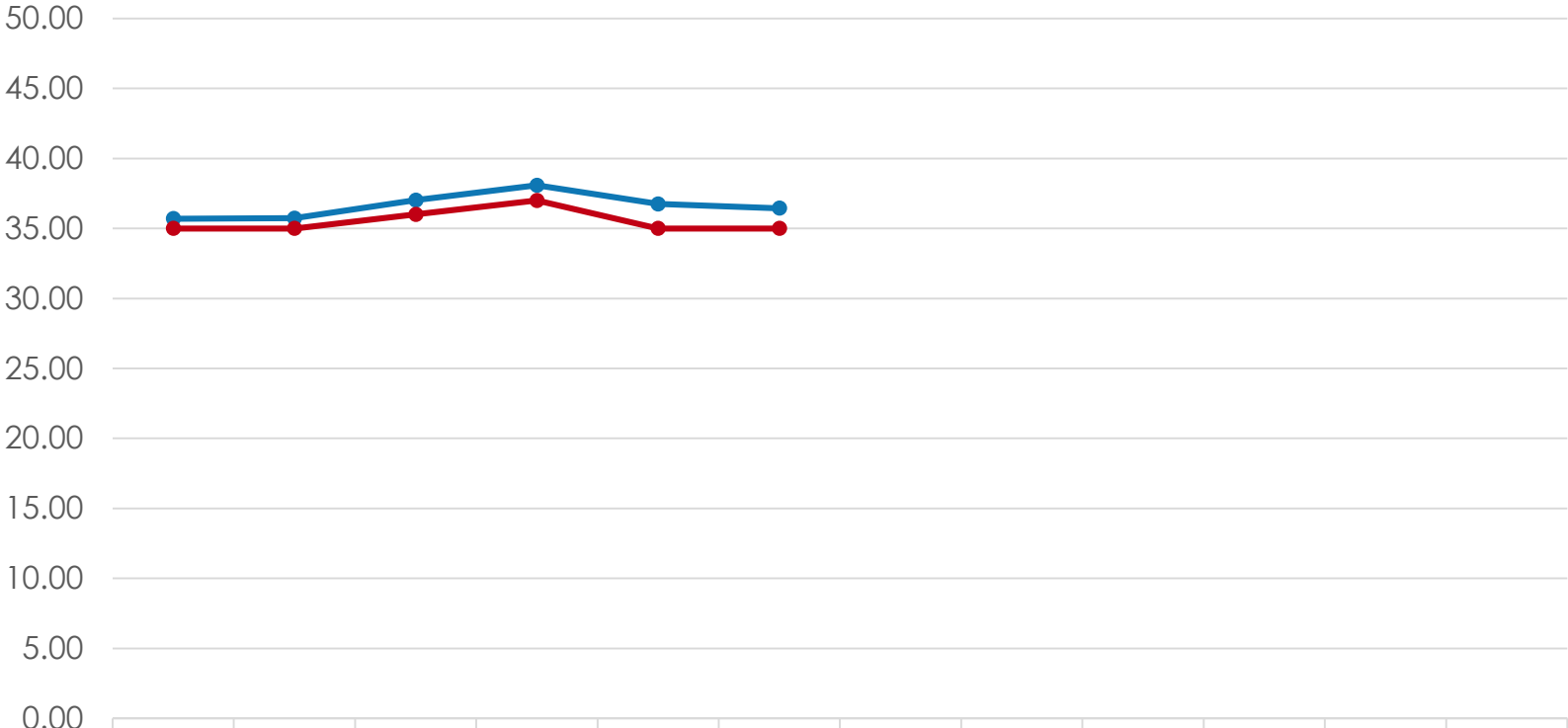
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	35.70	35.73	37.02	38.08	36.75	36.44						
MEDIAN	35	35	36	37	35	35						

[A]

Age – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

QF And what was your age on your last birthday?

		TOTAL	FIT	MICE	HONEY-MOON	WEDDING	LEISURE TRAVELER	FAMILY	GROUP TOUR	REPEAT VISITOR
		-	-	-	-	-	-	-	-	-
QF	18-24	3%	2%				2%	1%	20%	2%
	25-39	71%	81%	89%	100%	100%	73%	69%	60%	73%
	40-49	17%	12%				15%	20%		18%
	50-59	5%	3%				5%	5%		3%
	60+	5%	2%	11%			4%	5%	20%	3%
	Total	350	132	9	7	1	312	280	5	60
QF	Mean	36.44	34.55	36.22	30.29	28.00	36.48	37.56	34.80	36.22
	Median	35	33	33	29	28	35	35	29	35

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Annual Household Income

EXCHANGE RATE KW1,132.69=$1

13

Annual Household Income

EXCHANGE RATE KW1,132.69=$1

■ 1st Time ■ Repeat

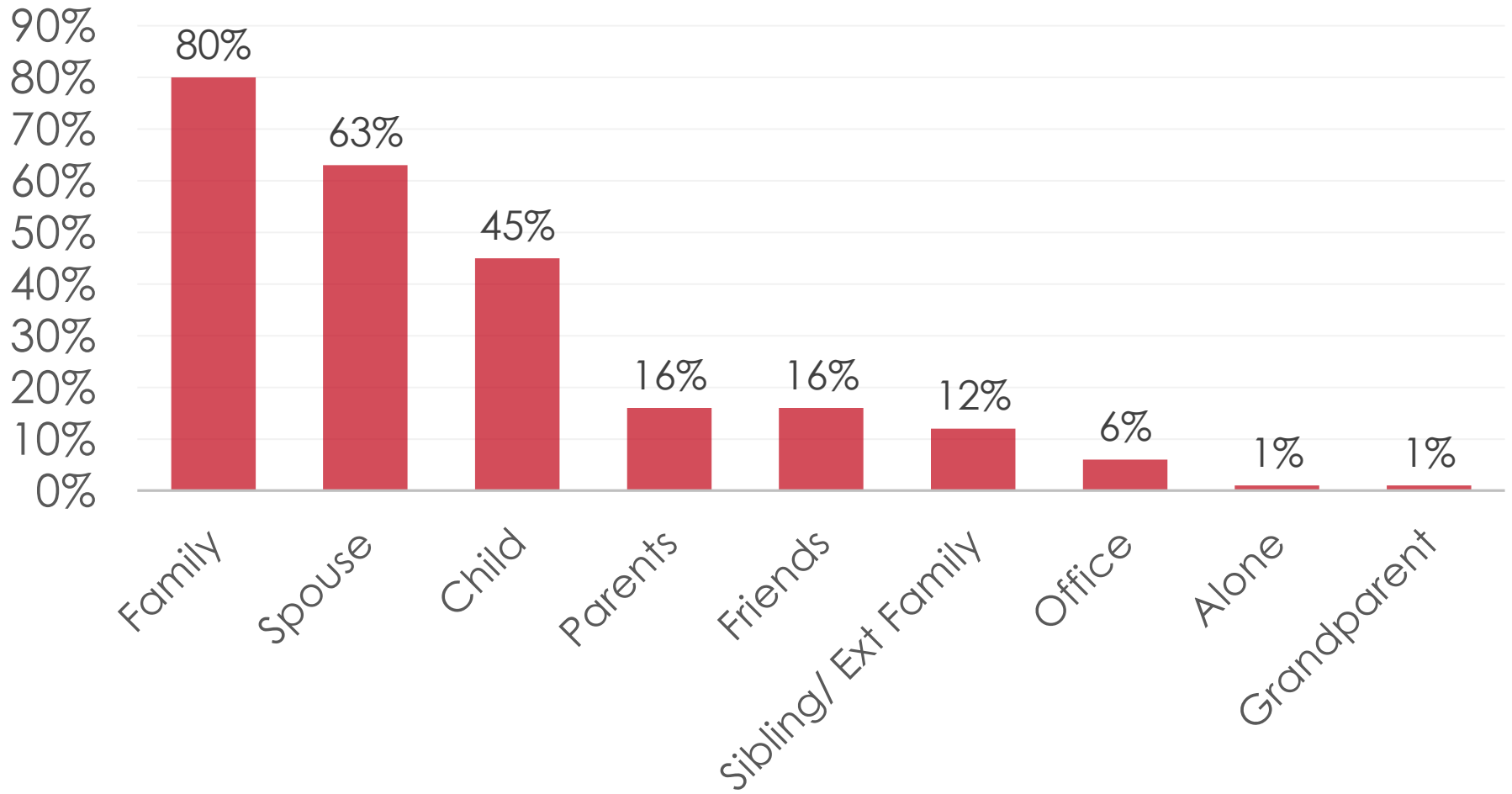| Income	1st Time	Repeat
<KW24M	4%	2%
KW24M-36M	19%	15%
KW36M-48M	24%	30%
KW48M-60M	19%	12%
KW60M-72M	19%	18%
KW72M+	15%	22%

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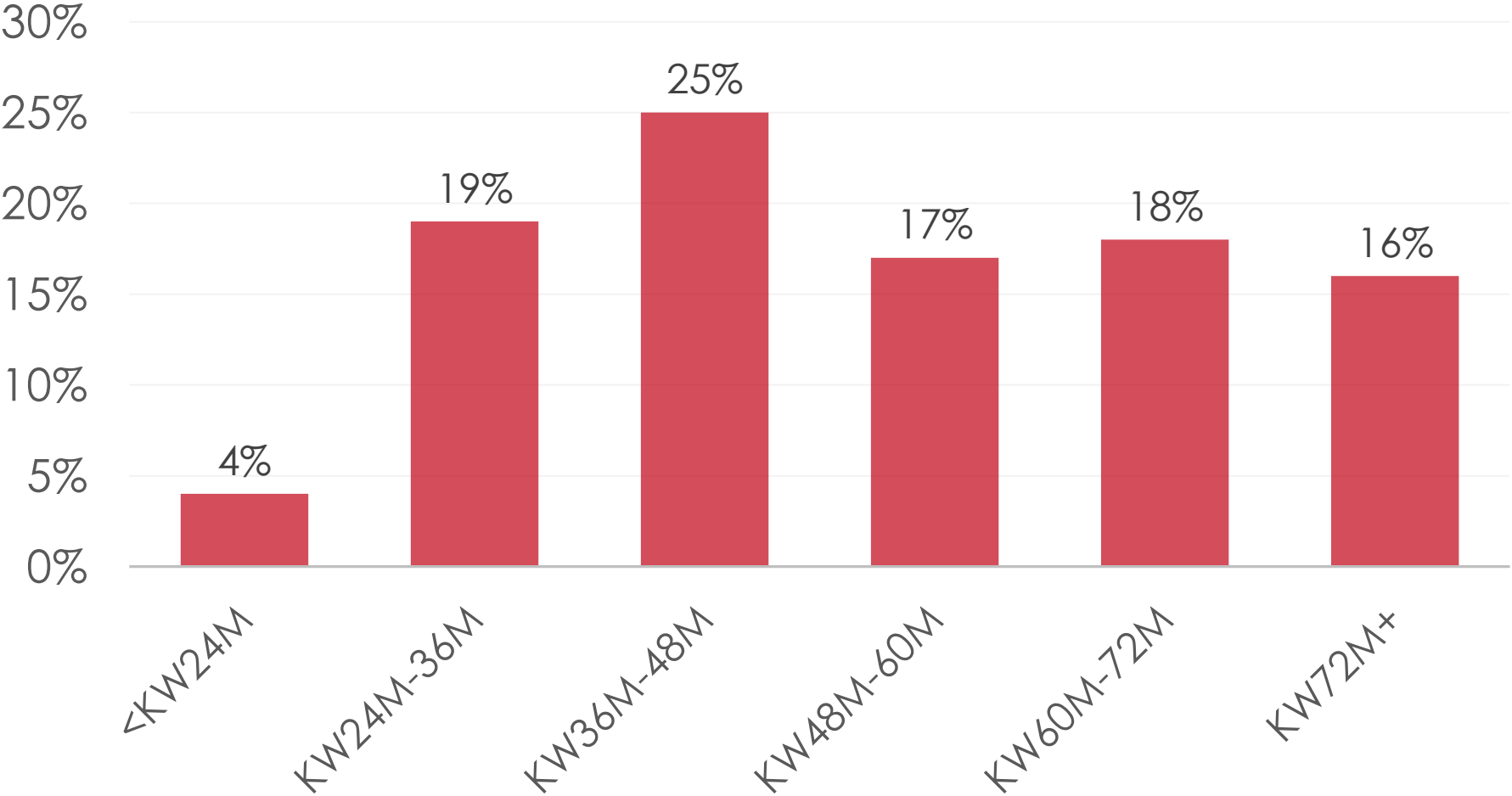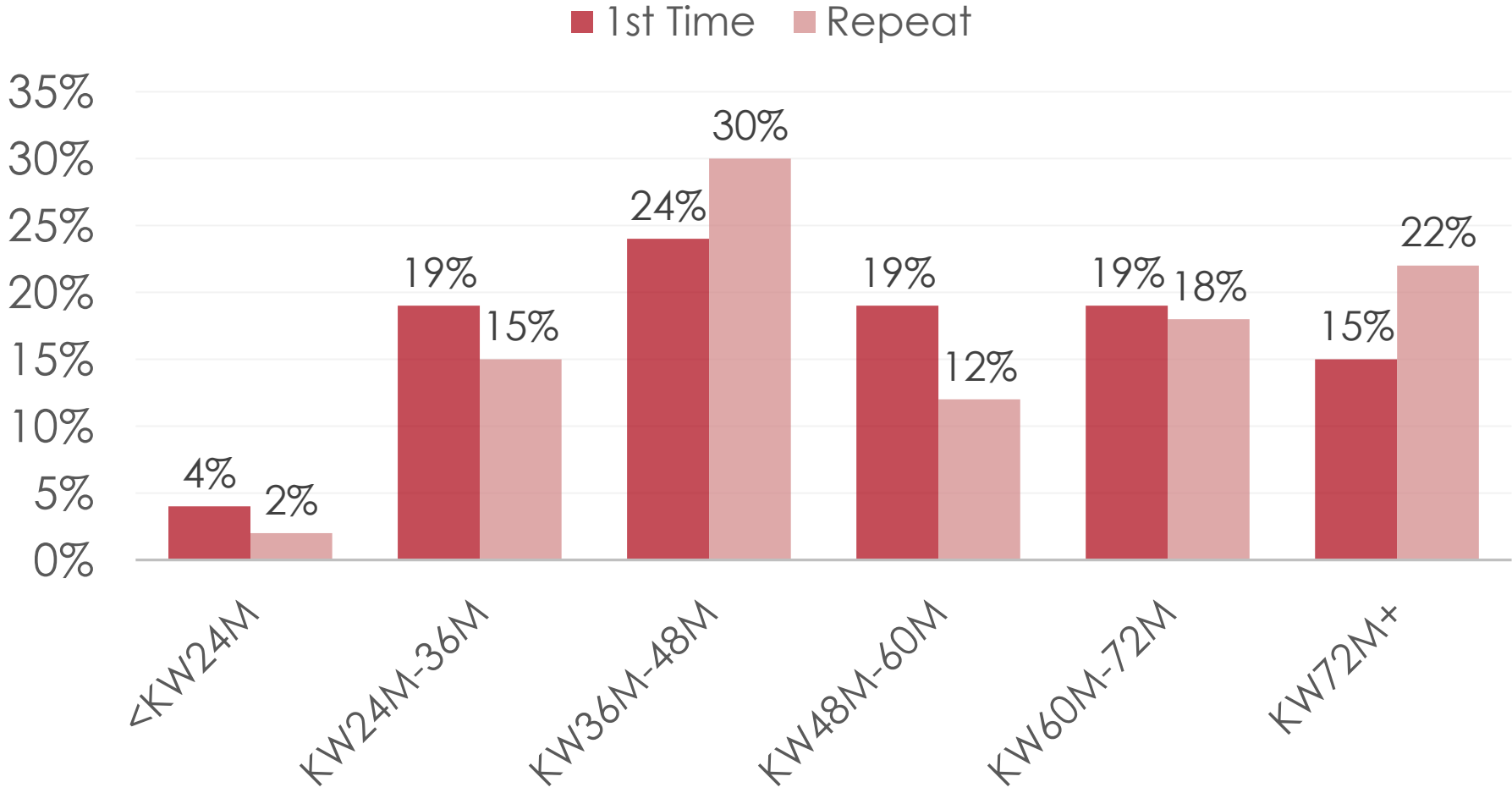
Annual Household Income – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q26 What is your approximate annual household income before taxes?

		TOTAL	FIT	MICE	HONEY-MOON	WEDDING	LEISURE TRAVELER	FAMILY	GROUP TOUR	REPEAT VISITOR
		-	-	-	-	-	-	-	-	-
Q26	<KW12.0M	1%					1%	1%		2%
	KW12.0M-KW24.0M	3%	4%	11%			3%	2%		
	KW24.0M-KW36.0M	19%	23%	22%	50%		19%	13%	20%	15%
	KW36.0M-KW48.0M	25%	24%	22%	33%		25%	27%		30%
	KW48.0M-KW60.0M	17%	16%	33%			17%	18%	20%	12%
	KW60.0M-KW72.0M	18%	13%	11%		100%	19%	21%	40%	18%
	KW72.0M+	16%	19%		17%		17%	17%	20%	22%
	No Income	1%	1%				0%	1%		2%
	Total	347	132	9	6	1	309	277	5	60

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Travel Party

[A]

Travel Party - Children

N = 158
45% TRAVELING WITH A CHILD

[A]

Trips to Guam

Repeat 17%

First time 83%

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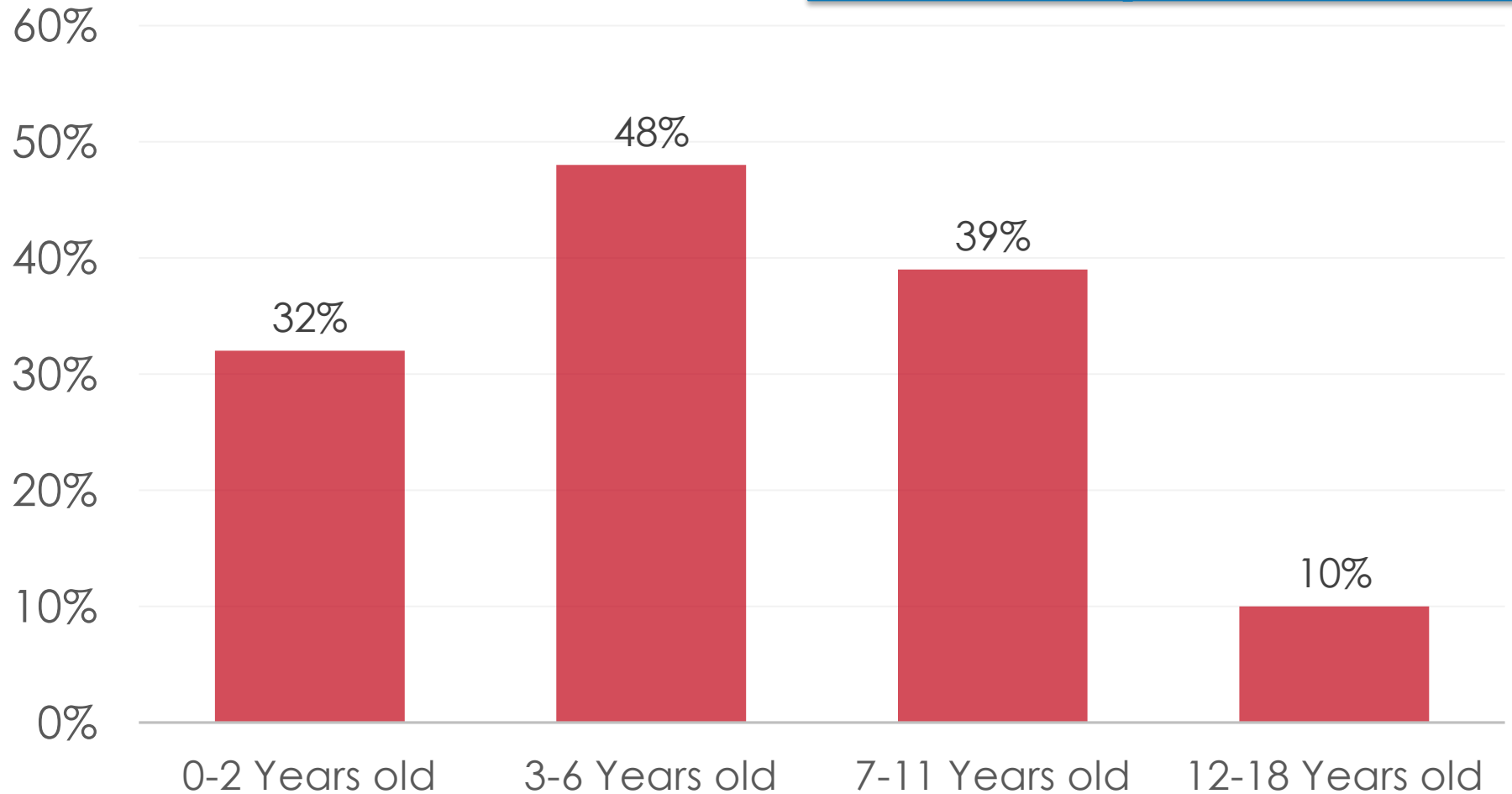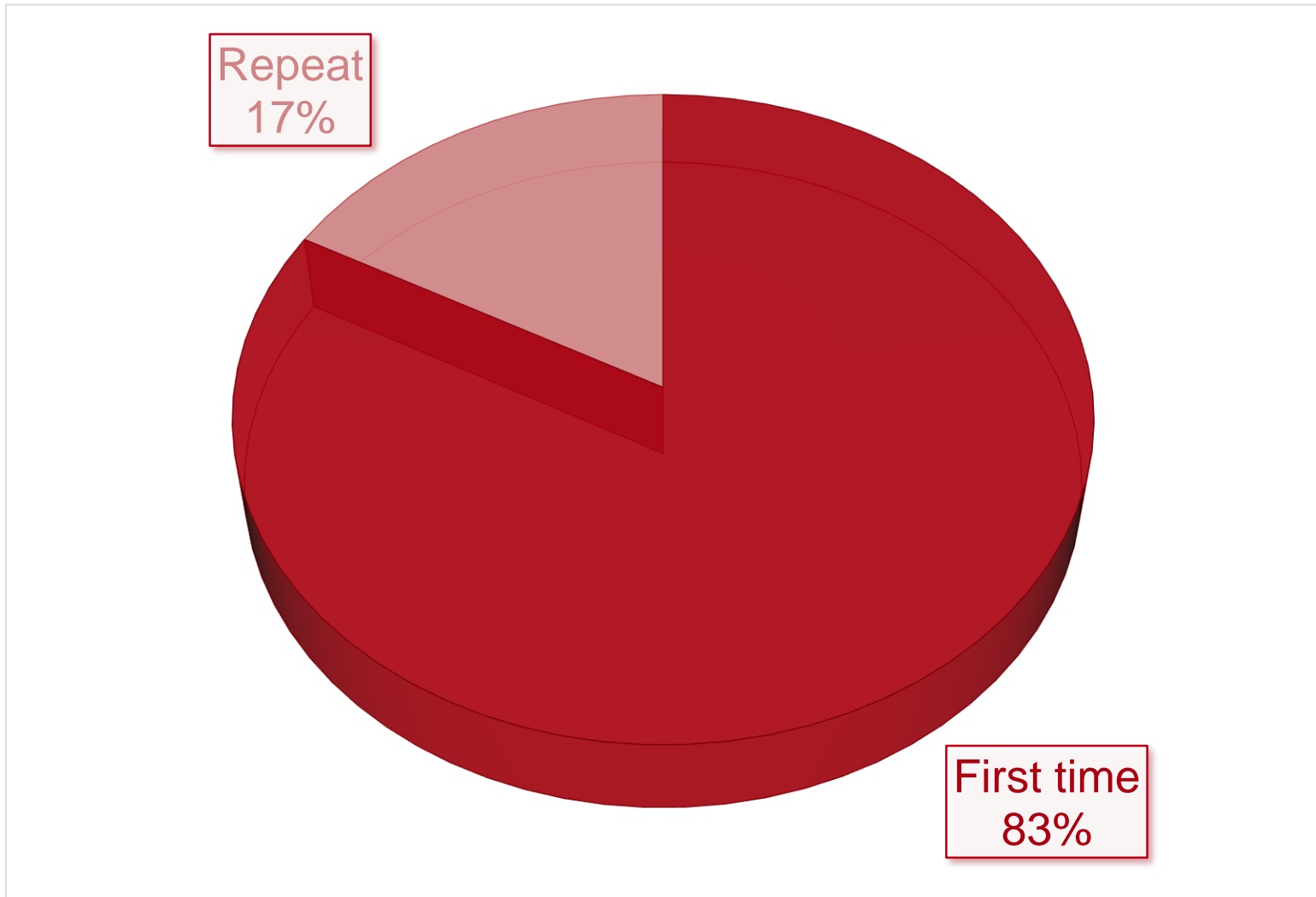
Trips to Guam – FY2017 Tracking

First: Oct-16 86%, Nov-16 82%, Dec-16 88%, Jan-17 82%, Feb-17 84%, Mar-17 83%

Repeat: Oct-16 14%, Nov-16 18%, Dec-16 12%, Jan-17 18%, Feb-17 16%, Mar-17 17%

Legend: First — Repeat

[A]
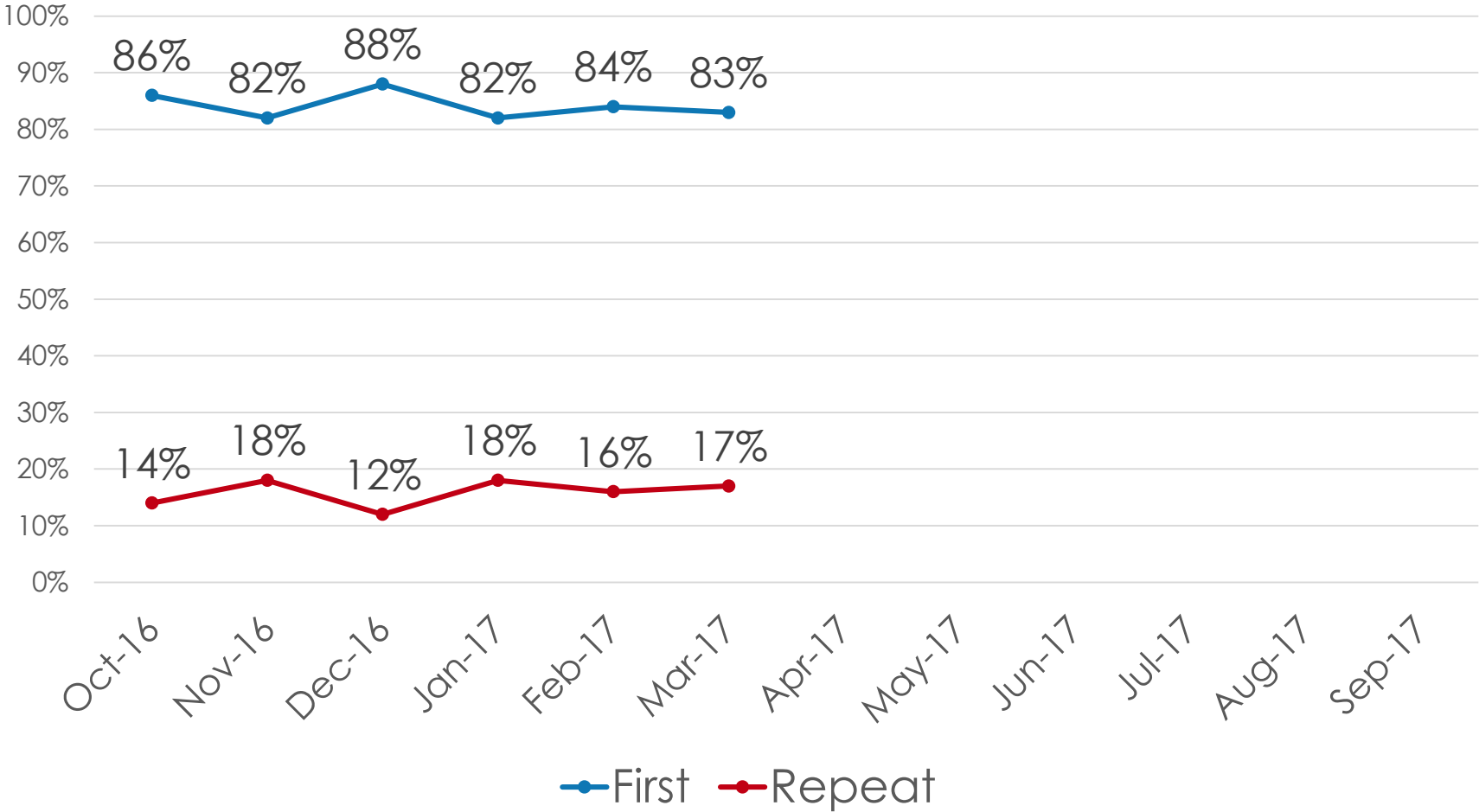
Trips to Guam – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q3A Is this your first trip to Guam?

		TOTAL	FIT	MICE	HONEY-MOON	WEDDING	LEISURE TRAVELER	FAMILY	GROUP TOUR	REPEAT VISITOR
		-	-	-	-	-	-	-	-	-
Q3A	Yes	83%	84%	78%	100%	100%	84%	82%	60%	
	No	17%	16%	22%			16%	18%	40%	100%
	Total	348	131	9	6	1	310	278	5	60

Prepared by QMark Research

Repeat Visitor- Most Recent Trip

N = 57
MEAN NUMBER OF TRIPS = 2.21
MEDIAN NUMBER OF TRIPS = 2

	Within the last year	One to two years ago	More than two years
Percentage	32%	21%	47%

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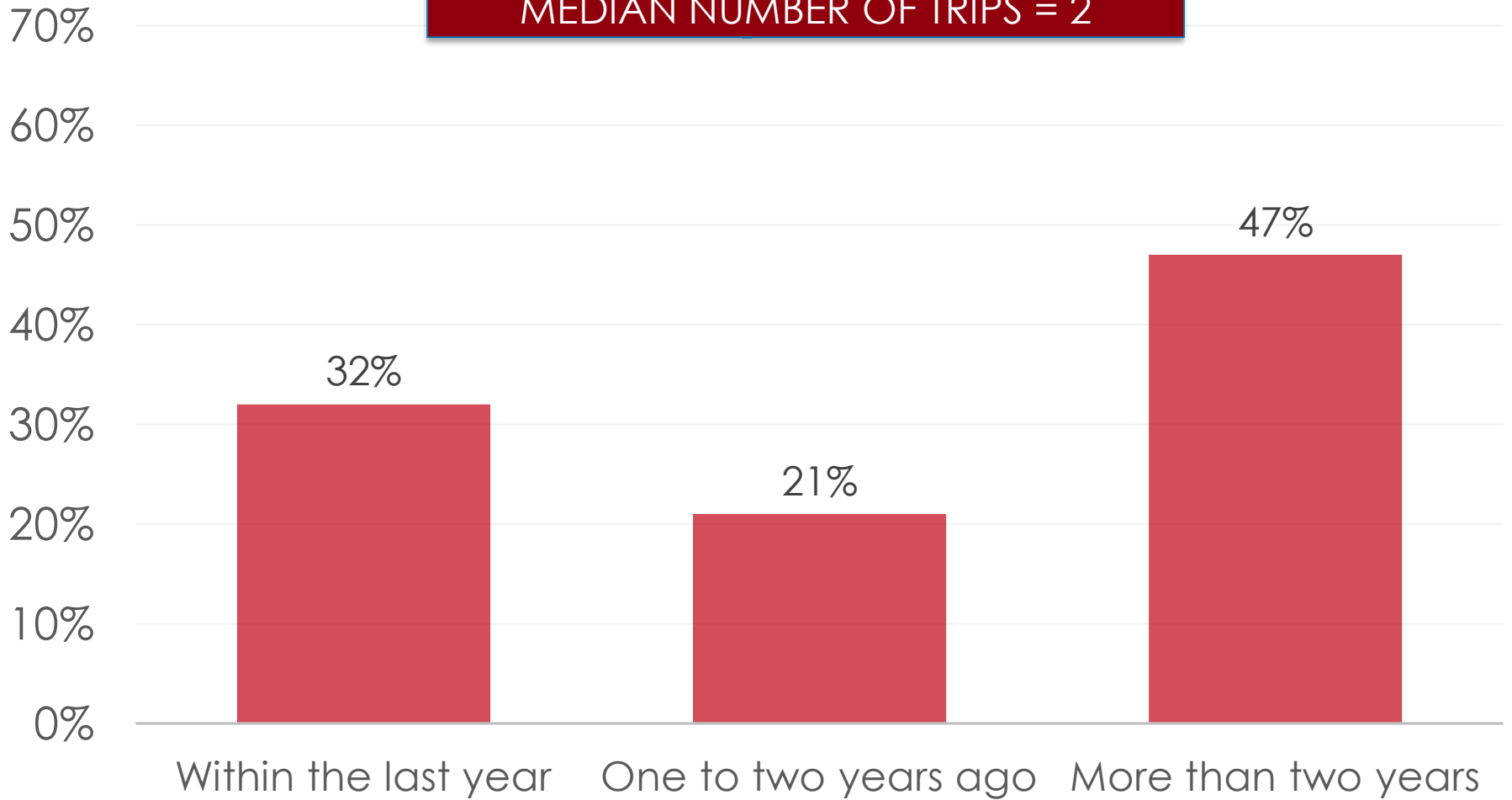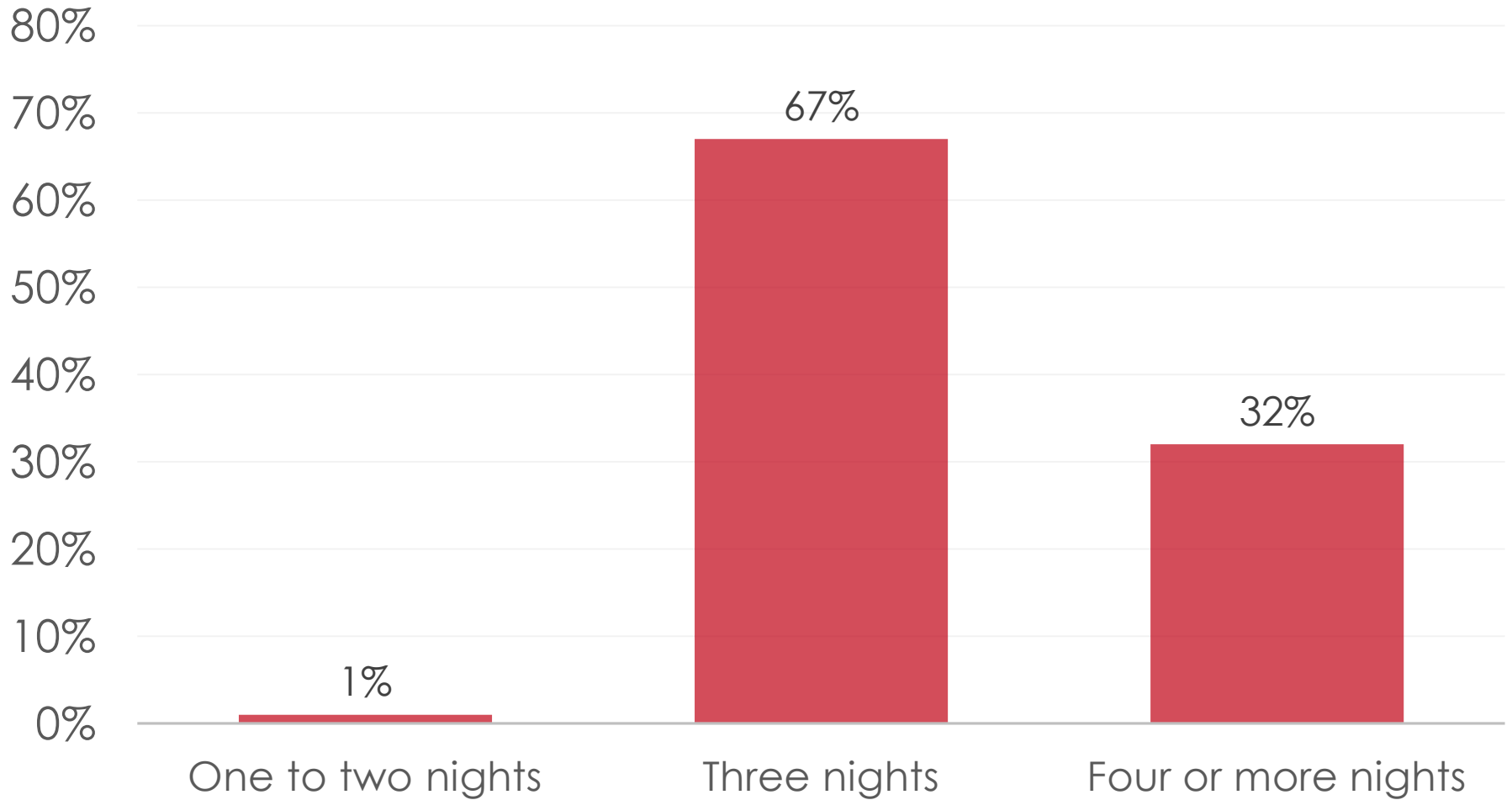
Length of Stay – FY2017 Tracking
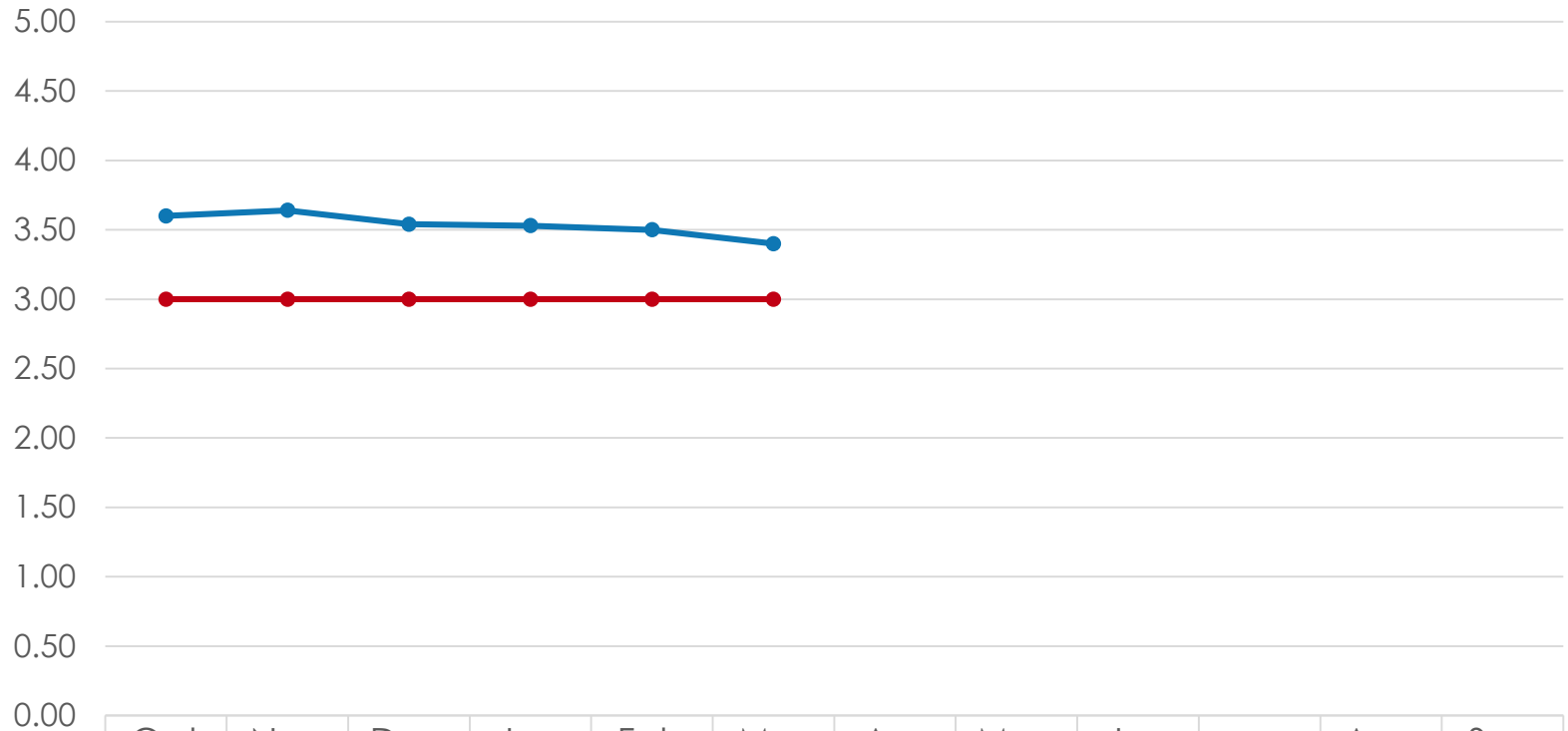
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	3.60	3.64	3.54	3.53	3.50	3.40						
MEDIAN	3	3	3	3	3	3						

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Length of Stay – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q8 How many nights did you stay on Guam?

		TOTAL	FIT	MICE	HONEY-MOON	WEDDING	LEISURE TRAVELER	FAMILY	GROUP TOUR	REPEAT VISITOR
		-	-	-	-	-	-	-	-	-
Q8	1-2	1%	2%				1%	1%		2%
	3	67%	58%	89%	57%	100%	66%	64%	80%	68%
	4+	32%	39%	11%	43%		33%	35%	20%	30%
	Total	350	132	9	7	1	312	280	5	60
Q8	Mean	3.40	3.51	3.11	3.71	3.00	3.39	3.42	3.20	3.40
	Median	3	3	3	3	3	3	3	3	3

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Occupation – Top Responses (10%+)

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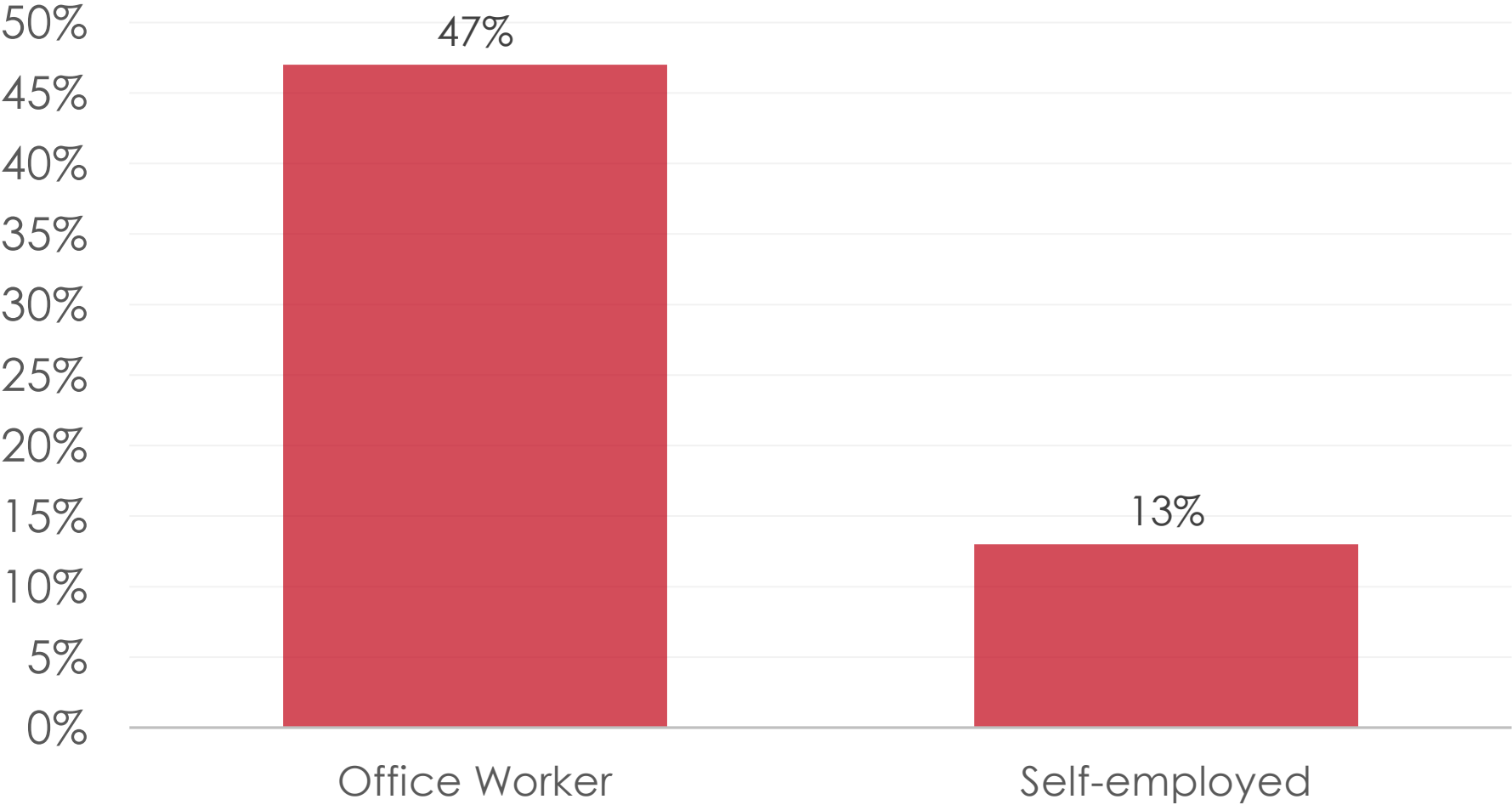
SECTION 2
TRAVEL PLANNING

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Travel Planning
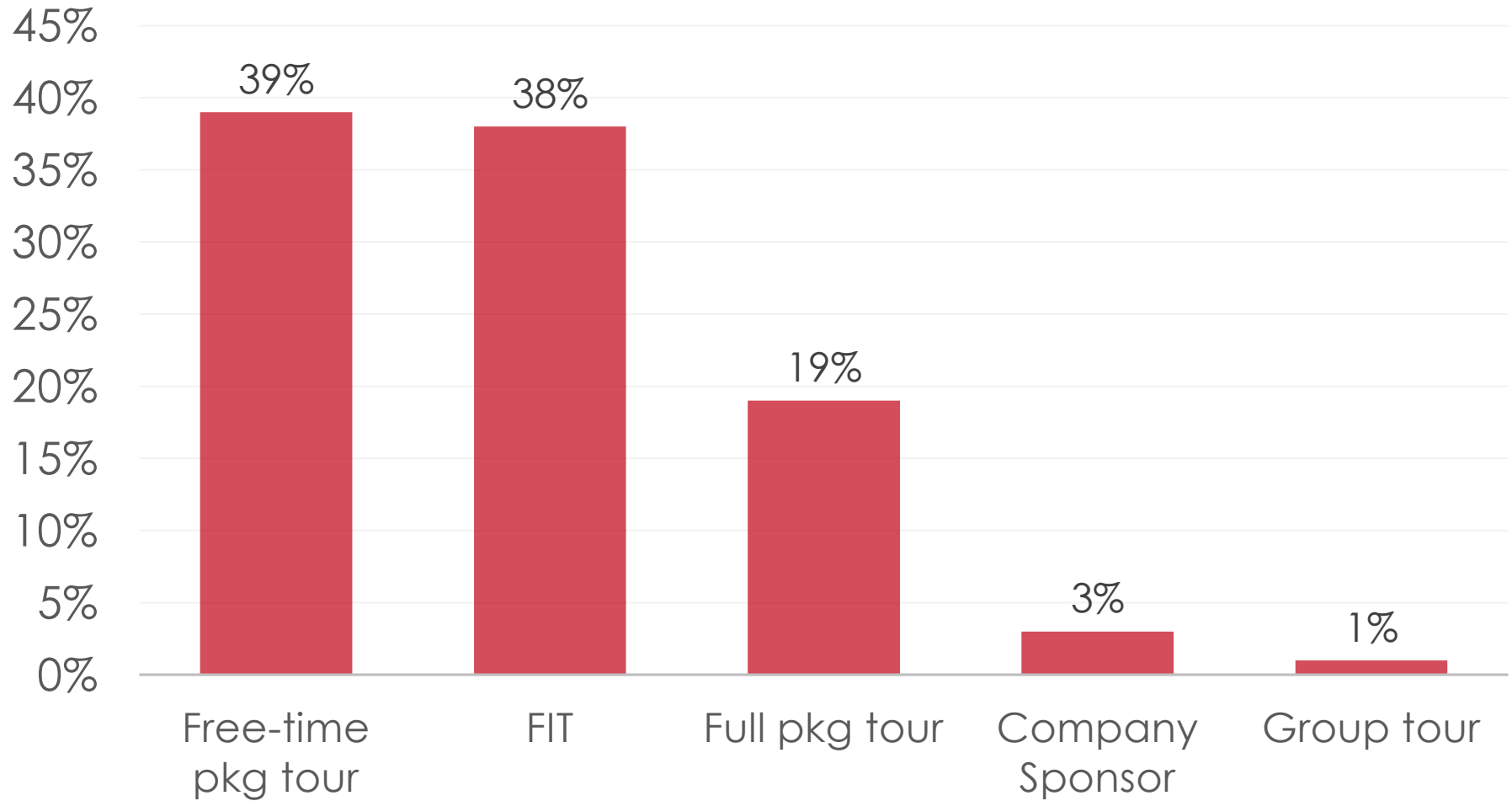
Travel Planning – FY2017 Tracking
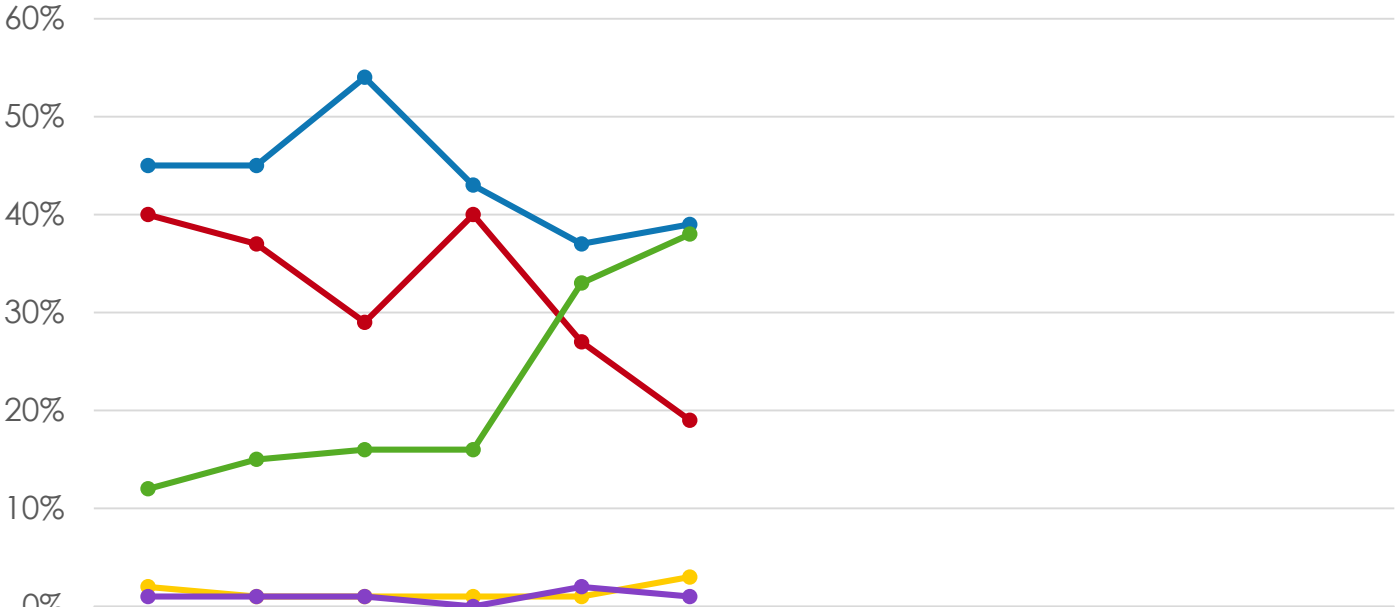
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Free-time pkg tour	45%	45%	54%	43%	37%	39%						
Full pkg tour	40%	37%	29%	40%	27%	19%						
FIT	12%	15%	16%	16%	33%	38%						
Company	2%	1%	1%	1%	1%	3%						
Group	1%	1%	1%	0%	2%	1%						

[A]

Travel Planning – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q7 Please describe your travel arrangements to Guam?

		TOTAL	FIT	MICE	HONEY-MOON	WEDDING	LEISURE TRAVELER	FAMILY	GROUP TOUR	REPEAT VISITOR
		-	-	-	-	-	-	-	-	-
Q7	Free-time package tour	39%		33%	29%		39%	39%		45%
	Individually arranged travel (FIT)	38%	100%	11%	14%	100%	38%	38%		35%
	Full package tour	19%		11%	57%		19%	22%		12%
	Company paid travel	3%		33%			3%	0%		3%
	Group tour	1%		11%			1%	1%	100%	3%
	Other	0%					0%	0%		2%
	Total	350	132	9	7	1	312	280	5	60

Prepared by QMark Research

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Accommodations (Top Responses)

Legend: ■ Stayed At ● Length of Stay

Accommodation	Stayed At	Length of Stay
PIC Club	26%	3.32
Hotel Nikko Guam	12%	3.17
Hyatt Regency Guam	9%	3.50
Dusit Thani Guam Resort	9%	3.22
Westin Resort Guam	6%	3.33
Guam Reef & Olive	5%	3.47
Lotte Hotel Guam	5%	3.25
Hilton Guam	5%	3.41
Onward Beach Resort	4%	3.47
Holiday Resort	4%	3.29

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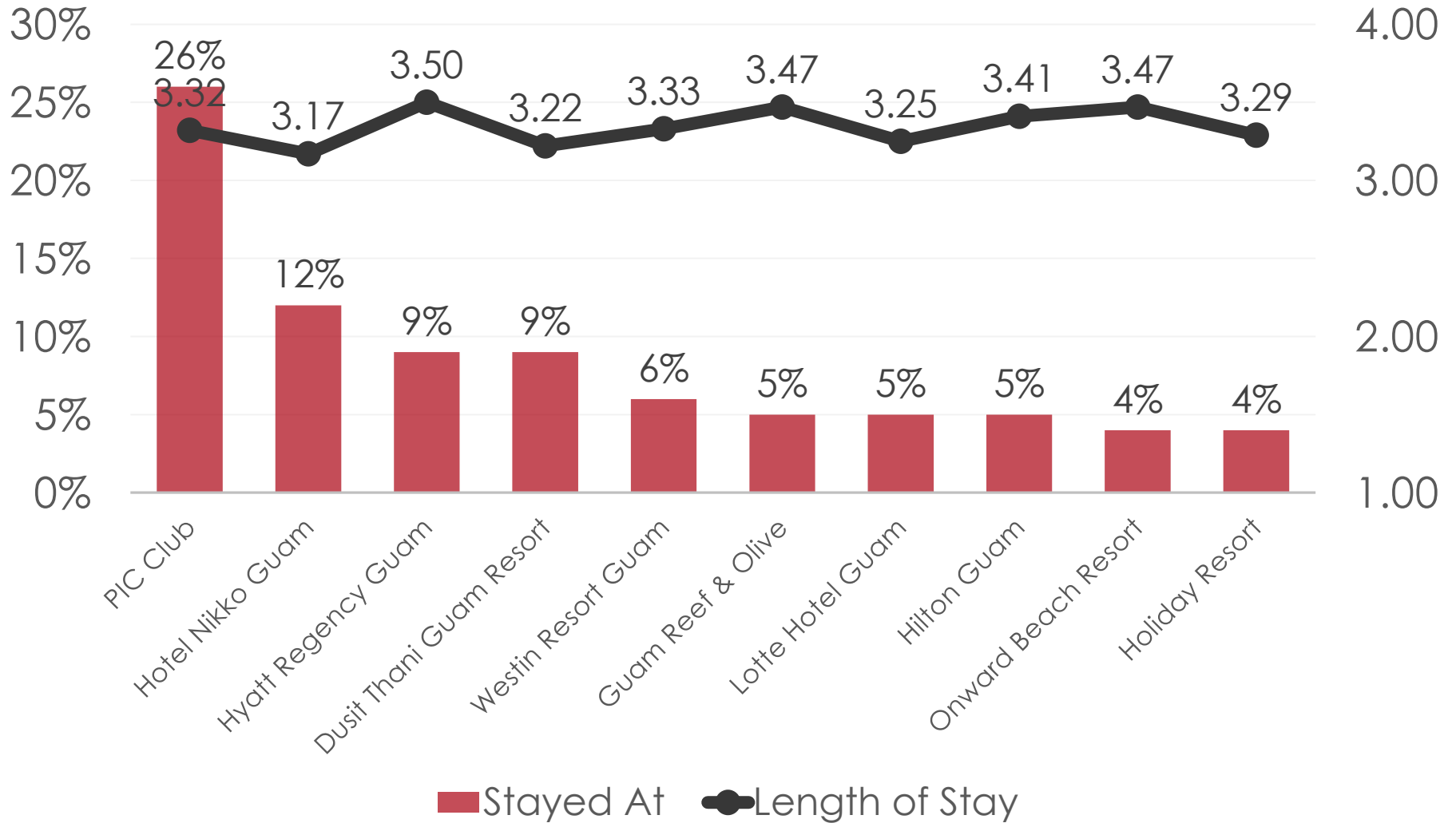
Travel Motivation (Top Responses)

Motivation	Percentage
Relax	60%
Natural beauty	58%
Safe	32%
Recommendation	31%
Short travel time	27%
Shopping	24%
Water sports	15%
Pleasure	15%
Price	11%
Prior trip	9%

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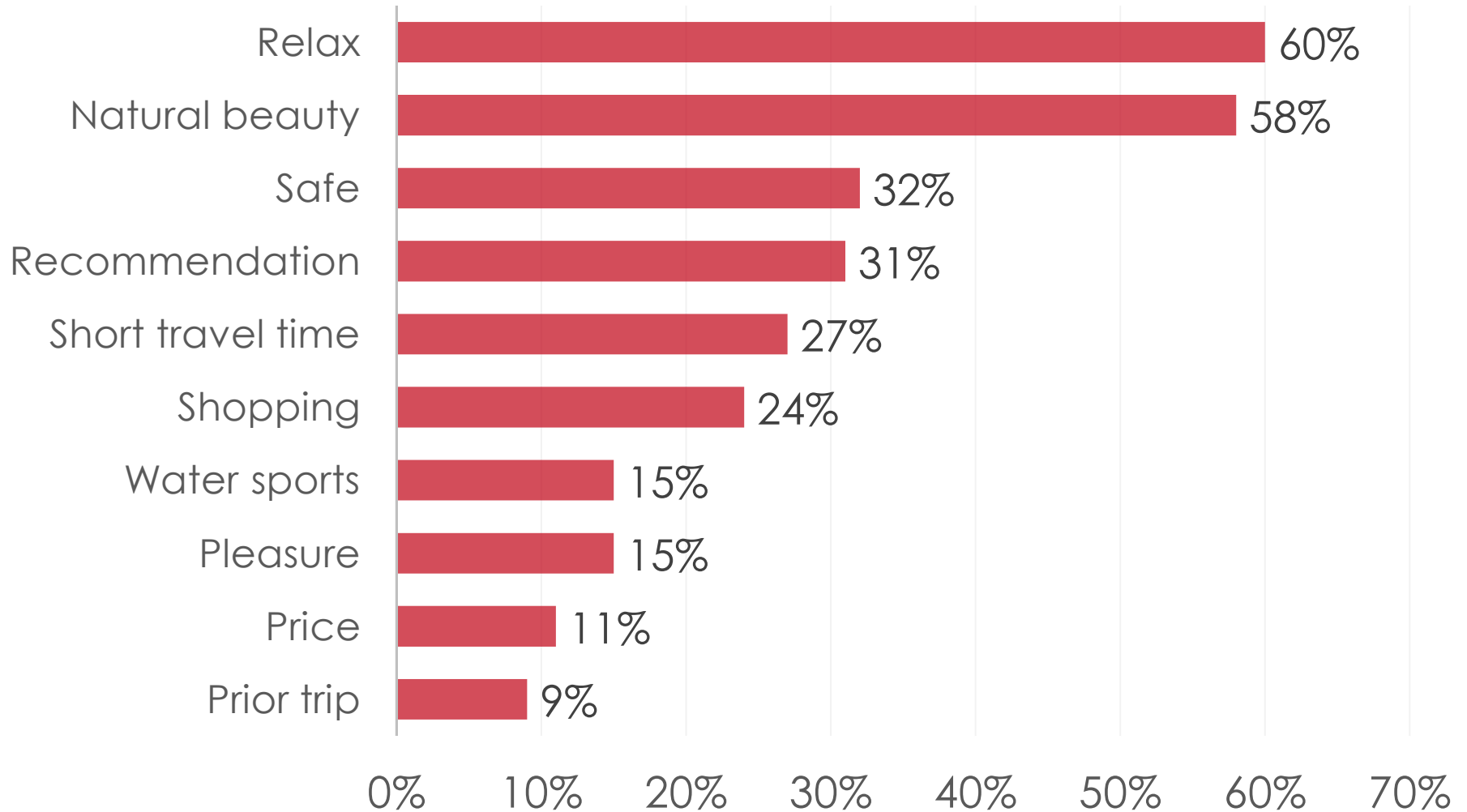
Travel Motivation – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q5A Please select the top 3 reasons that motivated you to travel to Guam?

		TOTAL	FIT	MICE	HONEY-MOON	WEDDING	LEISURE TRAVELER	FAMILY	GROUP TOUR	REPEAT VISITOR
		-	-	-	-	-	-	-	-	-
Q5A	Relax	60%	62%	44%	43%		67%	61%		50%
	Natural beauty	58%	61%	22%	100%		64%	59%	40%	48%
	Safe	32%	26%	11%	14%	100%	32%	35%	20%	23%
	Recomm-friend/family/trvl agnt	31%	33%	22%	14%		29%	31%	20%	12%
	Short travel time	27%	27%	11%			27%	28%	40%	30%
	Shopping	24%	32%	11%			23%	24%	40%	33%
	Pleasure	15%	14%	11%	14%	100%	17%	15%	20%	20%
	Water sports	15%	13%				13%	15%	20%	10%
	Price	11%	10%	11%	14%		9%	9%		17%
	Previous trip	9%	8%	11%			7%	10%	20%	50%
	Visit friends/ Relatives	6%	7%				5%	6%		7%
	Company/ Business Trip	4%		11%			4%	2%	20%	8%
	Scuba	3%	4%	11%			3%	2%		7%
	Company Sponsored	3%	1%	100%			2%	2%	20%	3%
	Other	2%	2%				3%	2%	20%	2%
	Honeymoon	2%	1%		100%		2%	3%		
	Golf	2%	2%				2%	1%	20%	
	Organized sports	1%	4%				1%	1%		2%
	Career Cert/ Testing	1%					0%			2%
	Married/ Attn wedding	0%	1%			100%	0%			
	Total	349	132	9	7	1	312	280	5	60

Prepared by QMark Research

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SECTION 3
EXPENDITURES

[A]

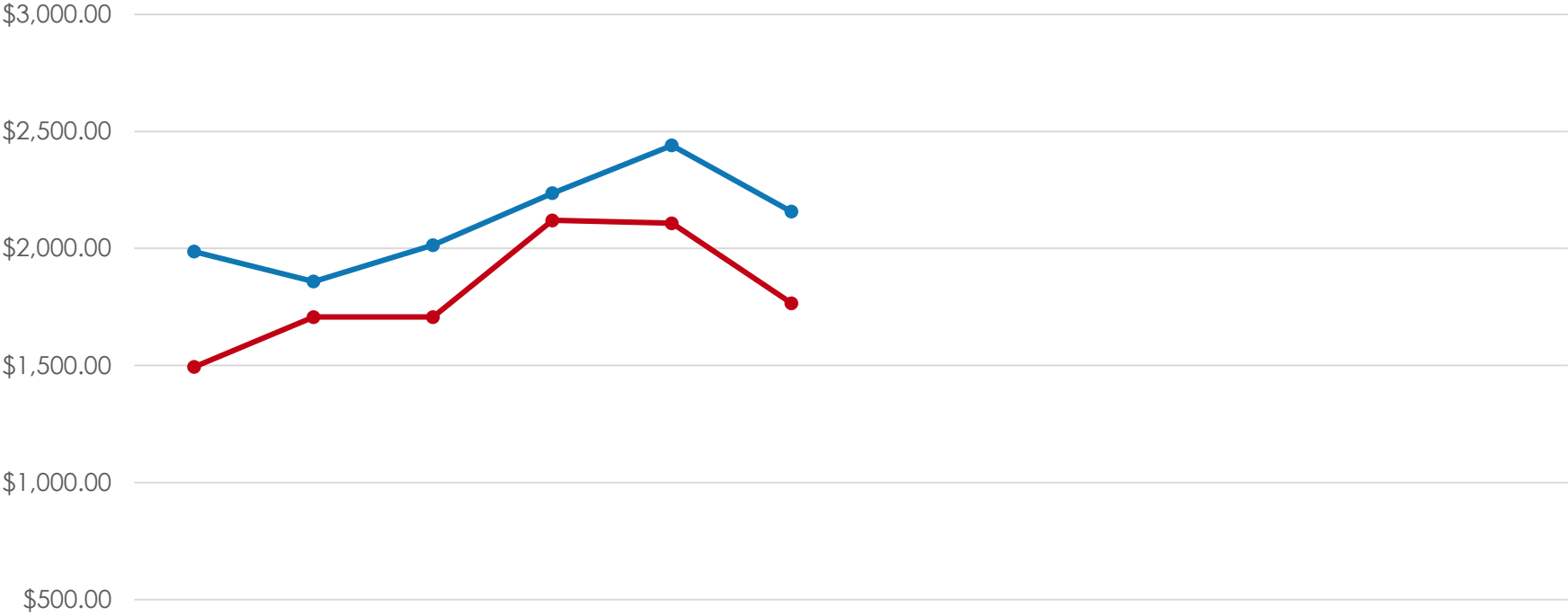# Prepaid Expenditures

- $2,157.26 = overall mean average prepaid expense (for entire travel party size) by respondent

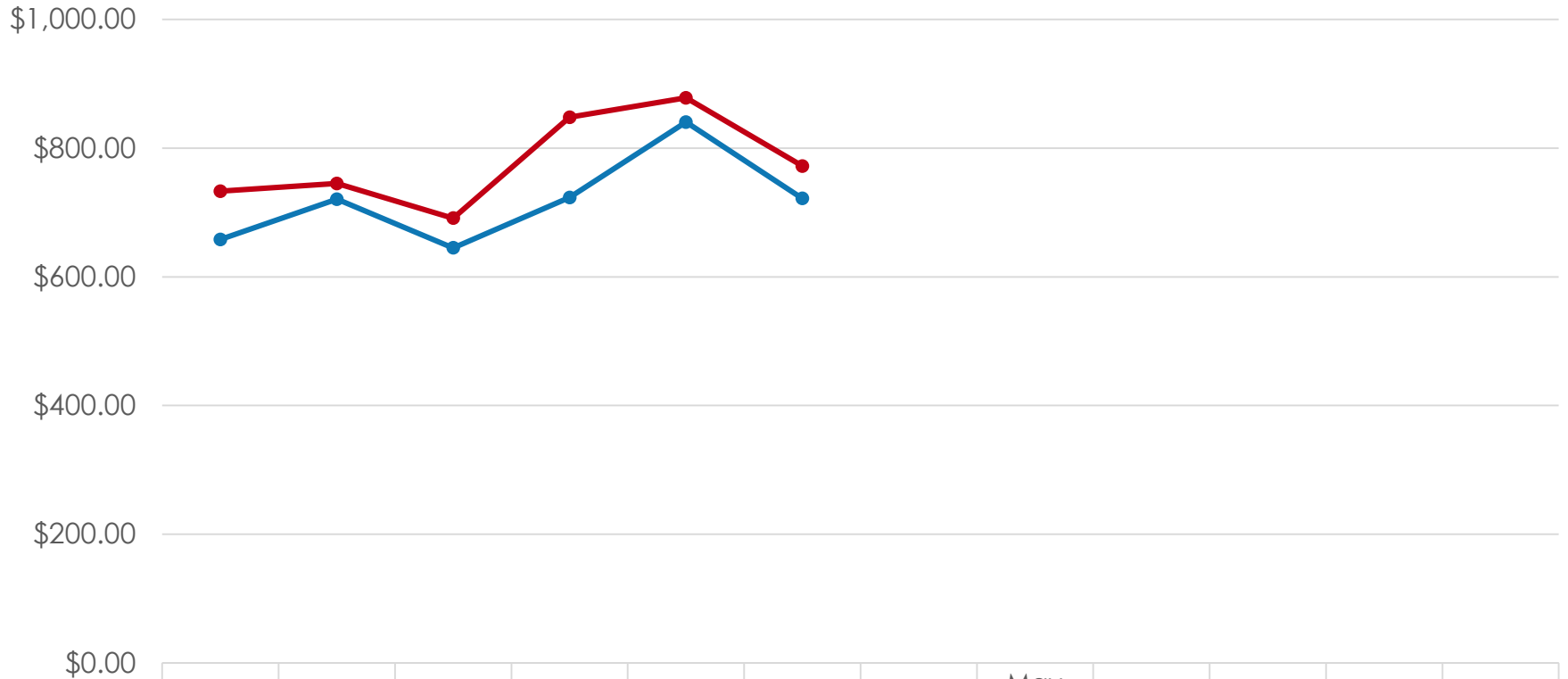- $721.76 = overall mean average <u>per person</u> prepaid expenditures

[A]

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						
MEDIAN	$1,494.00	$1,707.00	$1,707.00	$2,120.00	$2,108.00	$1,766.00						

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						
MEDIAN	$733.00	$745.00	$691.00	$848.00	$878.00	$772.00						

[A]

Prepaid Per Person– Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q10A How much did you pay in RUSSIA before coming to Guam for the tour package, your airfare, lodging meals, and transportation?

PER PERSON

		TOTAL	FIT	MICE	HONEY-MOON	WEDDING	LEISURE TRAVELER	FAMILY	GROUP TOUR	REPEAT VISITOR
		-	-	-	-	-	-	-	-	-
PREPAID PP	Mean	$721.76	$665.23	$608.64	$964.83	$1,103.57	$726.66	$706.62	$355.79	$653.39
	Median	$772	$662	$486	$1,059	$1,104	$769	$765	$0	$721

Prepared by QMark Research

[A]

Prepaid Expenses by Category – MEAN Entire Travel Party

Bar chart showing mean prepaid expenses by category:
- Air/ Hotel pkg: $2,719.39
- Air/ Hotel/ Meal pkg: $2,897.03
- Air Only: $899.01
- Hotel Only: $978.59
- Hotel/ Meal: $707.17
- F&B Hotel: $123.60
- Ground Trans-Korea: $51.41
- Ground Trans-Guam: $171.69
- Optional Tour: $336.64
- Other: $747.08

[A]

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						
MEDIAN	$1,969.00	$1,707.00	$2,134.00	$2,374.00	$2,635.00	$2,207.00						

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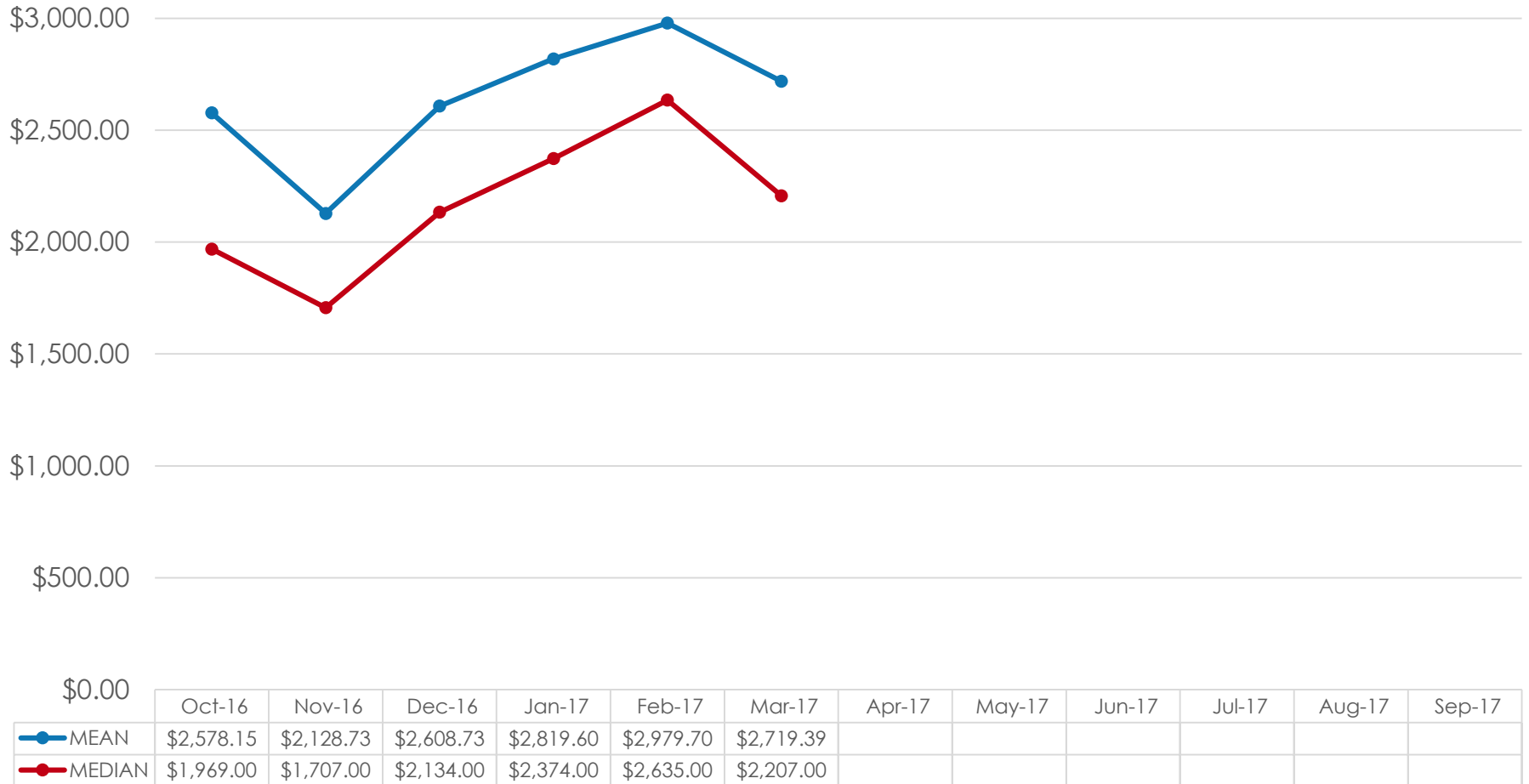
Prepaid– FY2017 Tracking
Airfare & Accommodation W/ Meal Packages

	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						
MEDIAN	$2,637.00	$2,560.00	$2,390.00	$2,866.00	$2,635.00	$2,649.00						

[A]
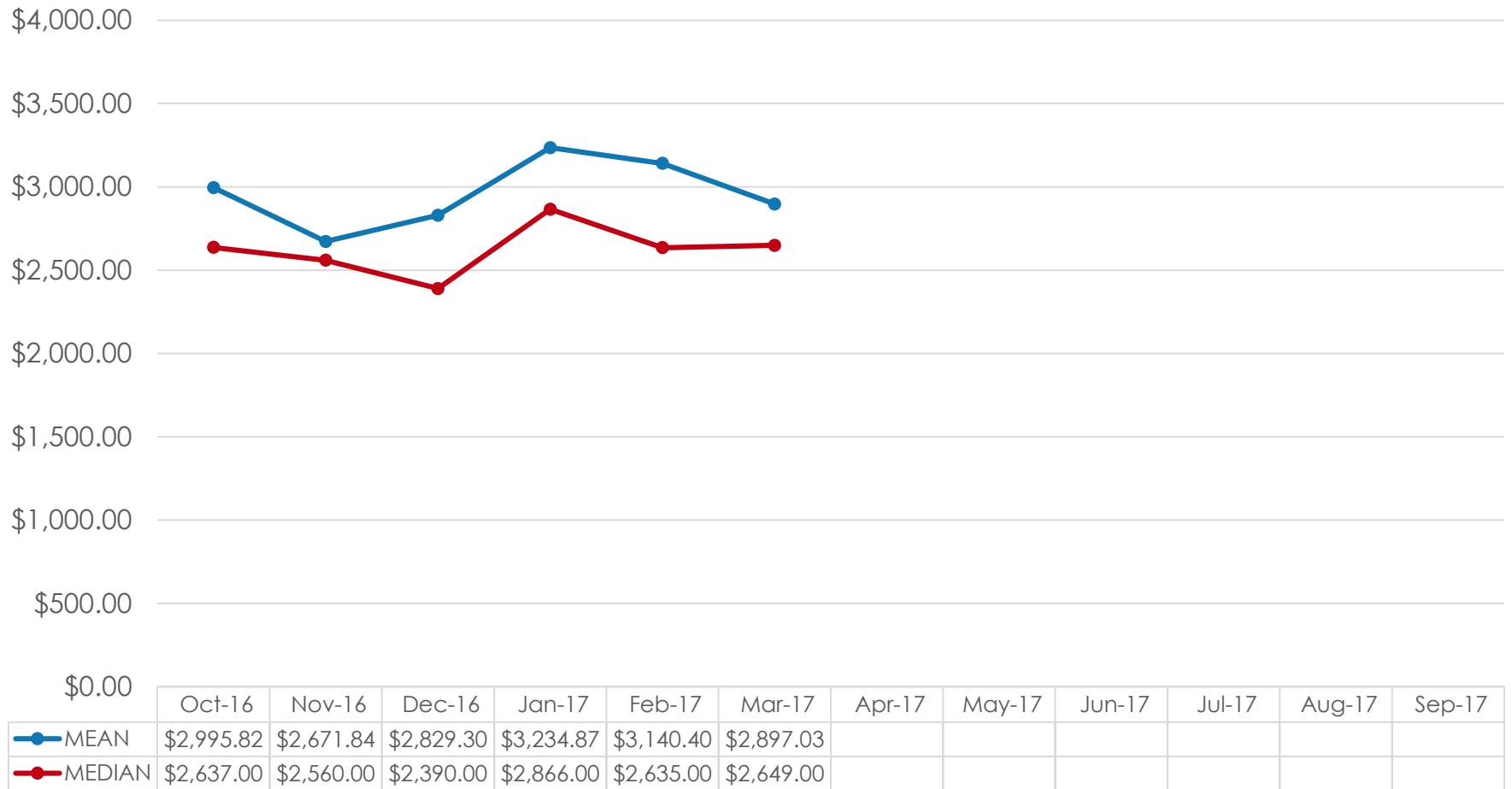
Prepaid– FY2017 Tracking
Airfare Only
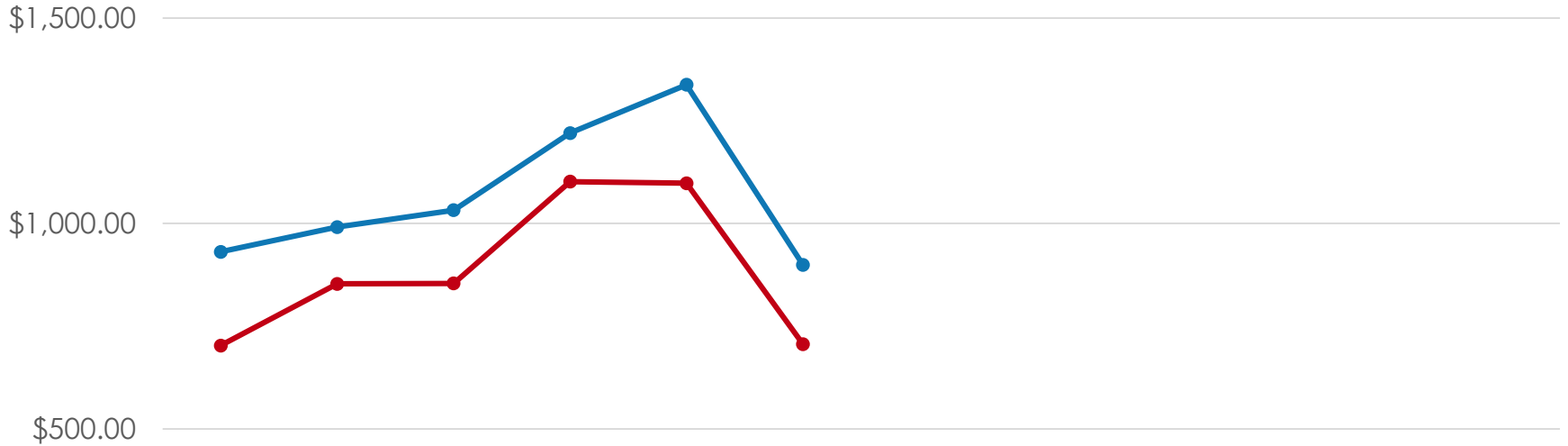
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$930.99	$991.20	$1,032.22	$1,220.24	$1,337.74	$899.01						
MEDIAN	$703.00	$853.00	$854.00	$1,102.00	$1,098.00	$706.00						

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Prepaid– FY2017 Tracking
Accommodations Only
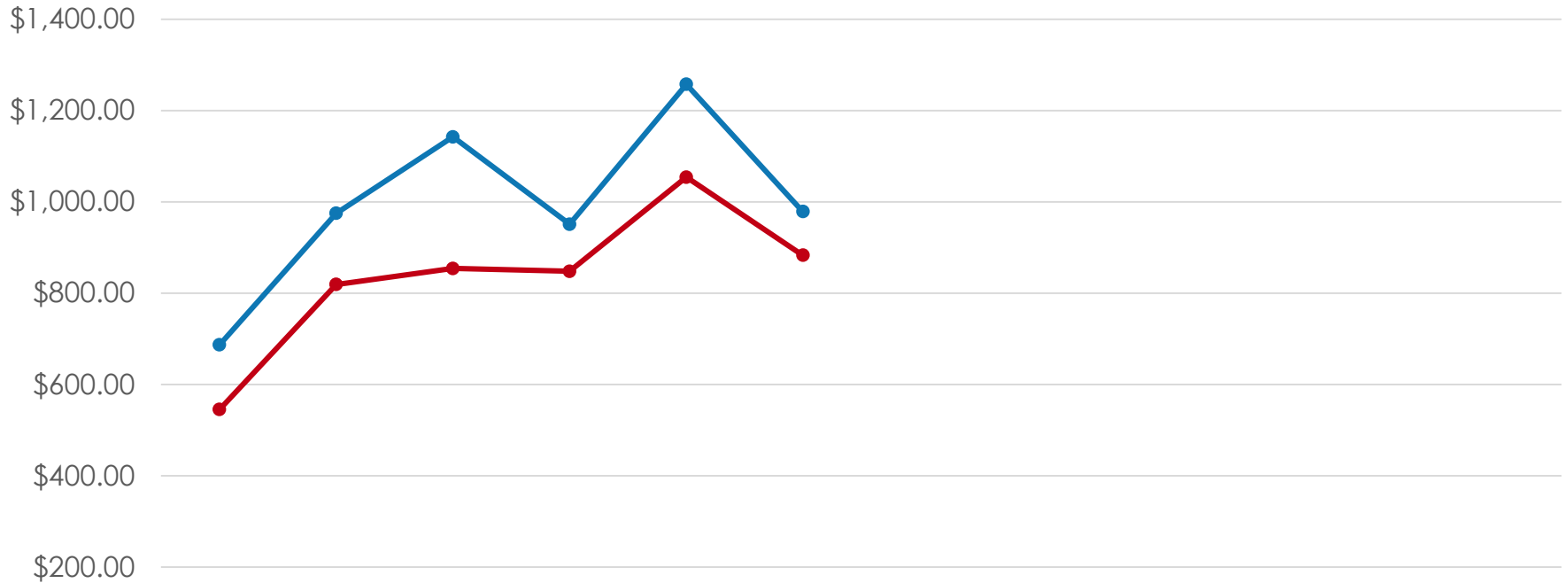
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$686.81	$974.76	$1,142.28	$951.10	$1,257.38	$978.59						
MEDIAN	$545.00	$819.00	$854.00	$848.00	$1,054.00	$883.00						

[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						
MEDIAN	$879.00	$853.00	$768.00	$975.00	$878.00	$662.00						

[A]
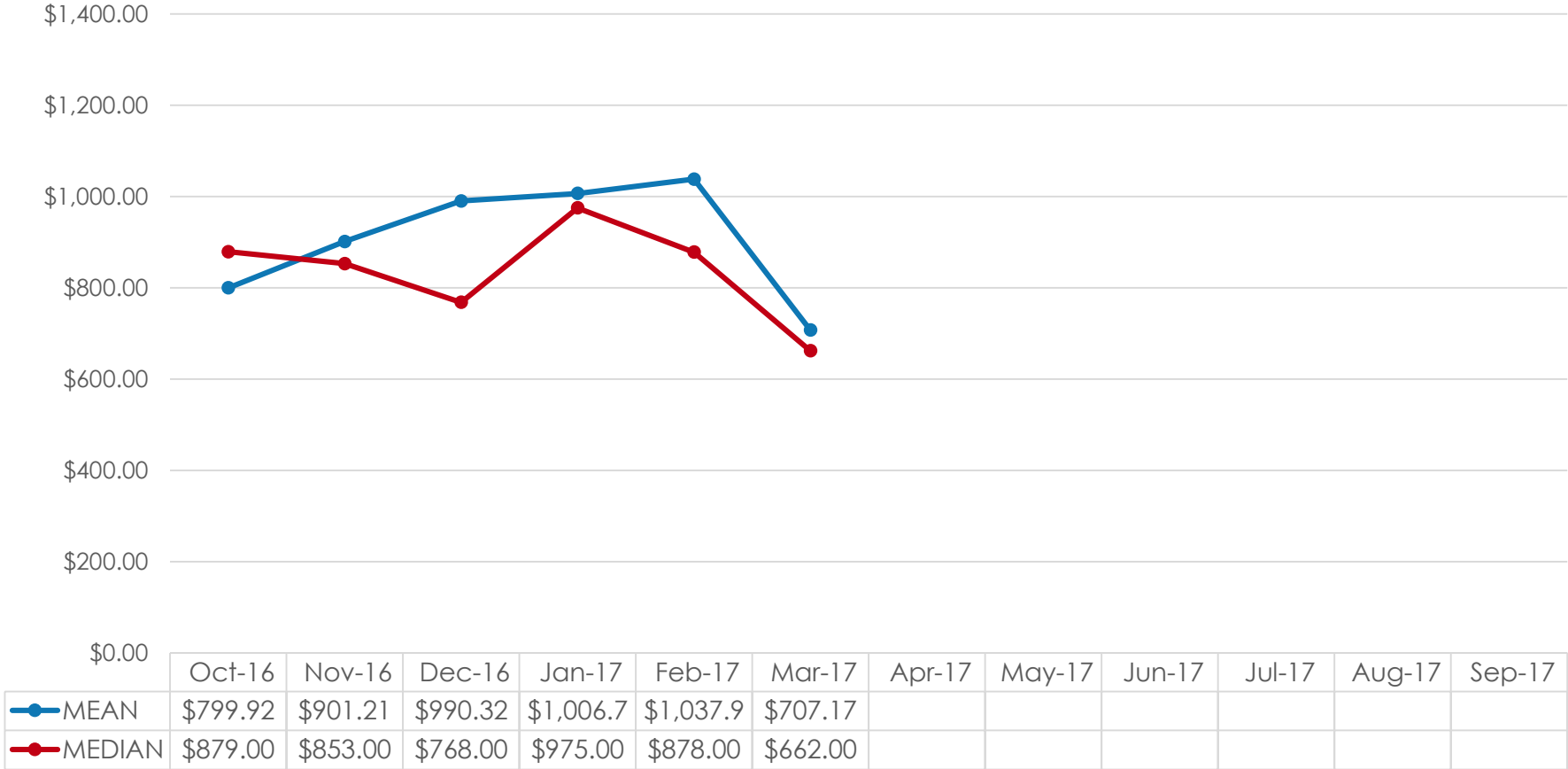
Prepaid– FY2017 Tracking
Food & Beverage in Hotel

	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						
MEDIAN	$791.00	$427.00	$848.00		$220.00	$124.00						

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						
MEDIAN	$44.00	$43.00	$51.00	$85.00	$44.00	$22.00						

[A]
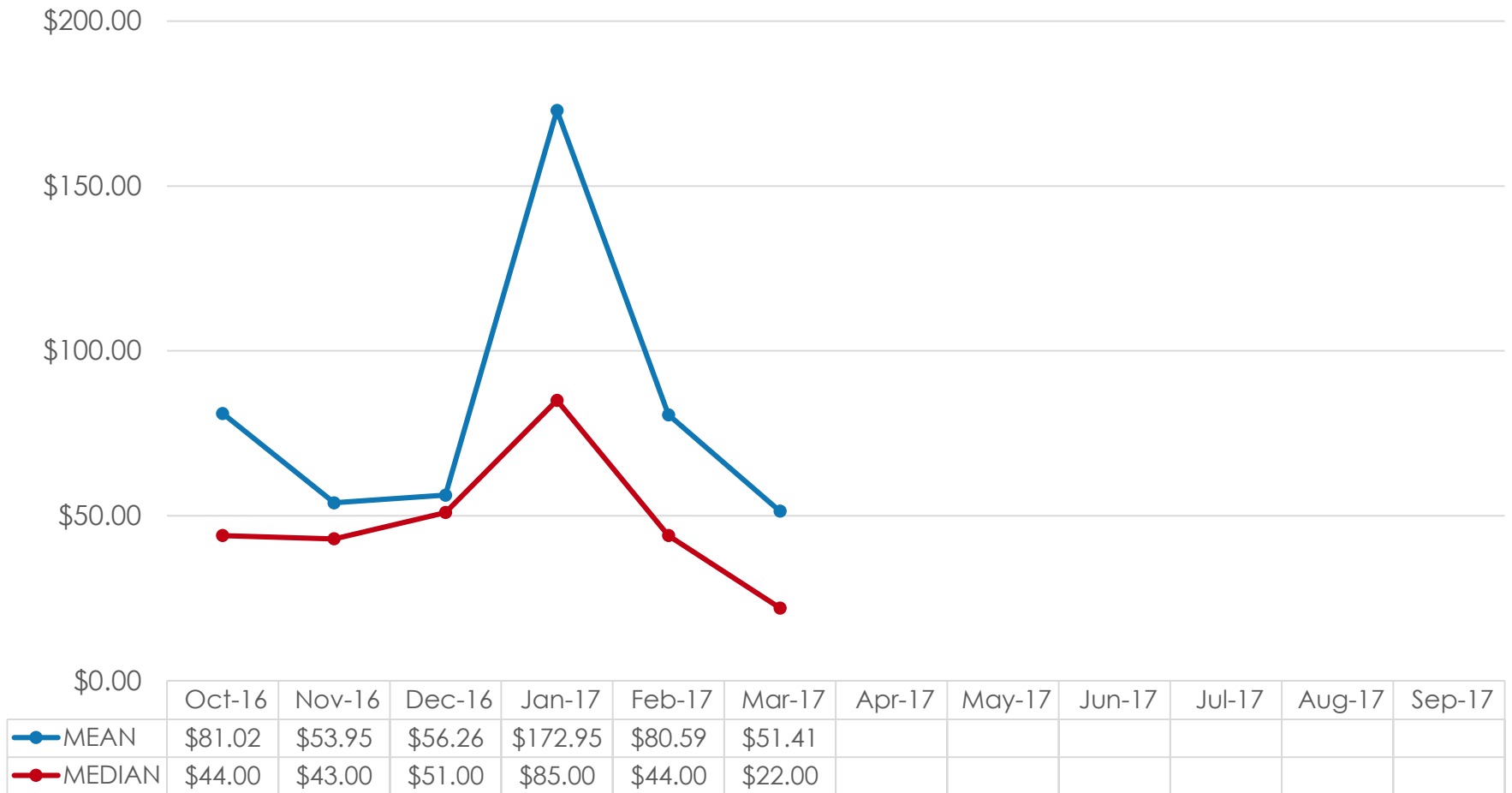
Prepaid– FY2017 Tracking
Ground Transportation - Guam
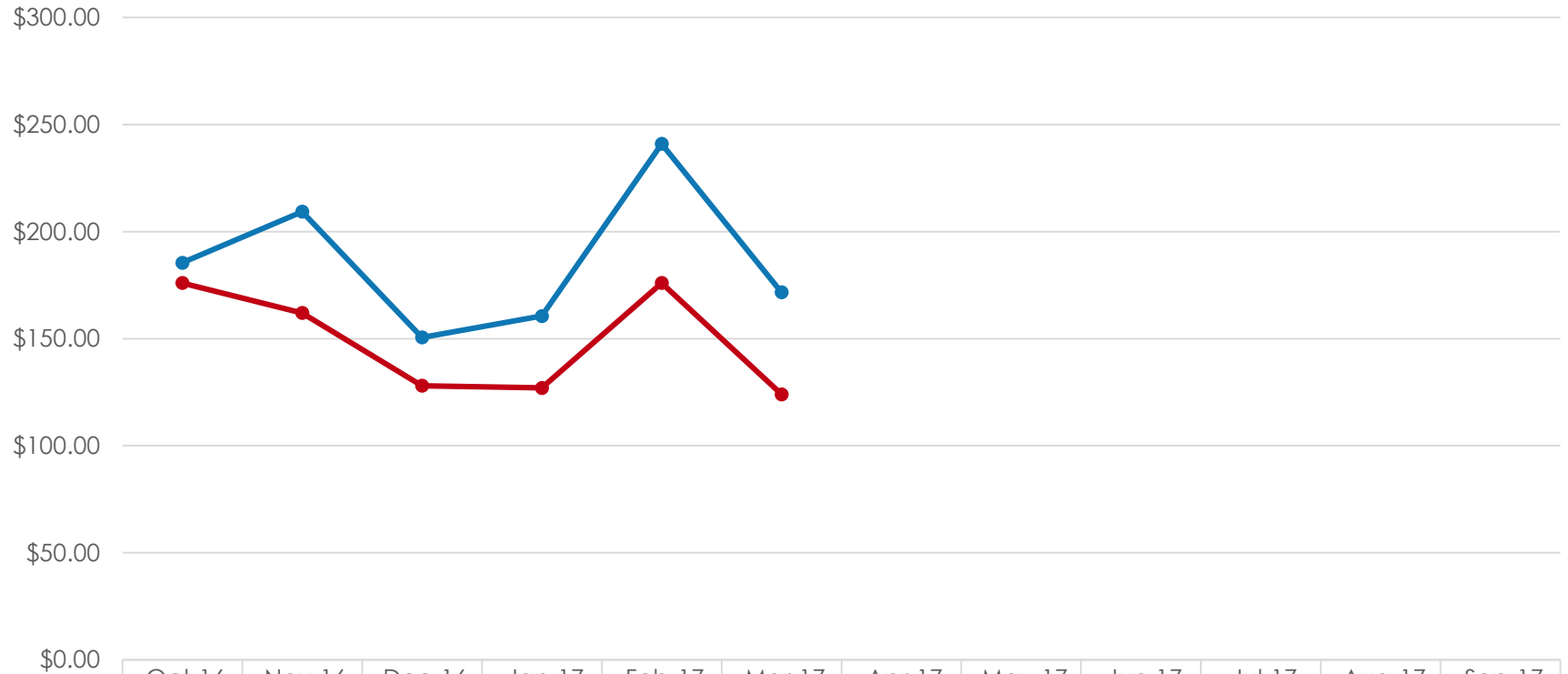
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$185.47	$209.35	$150.57	$160.59	$240.98	$171.69						
MEDIAN	$176.00	$162.00	$128.00	$127.00	$176.00	$124.00						

[A]

Prepaid– FY2017 Tracking
Optional tours/ Activities
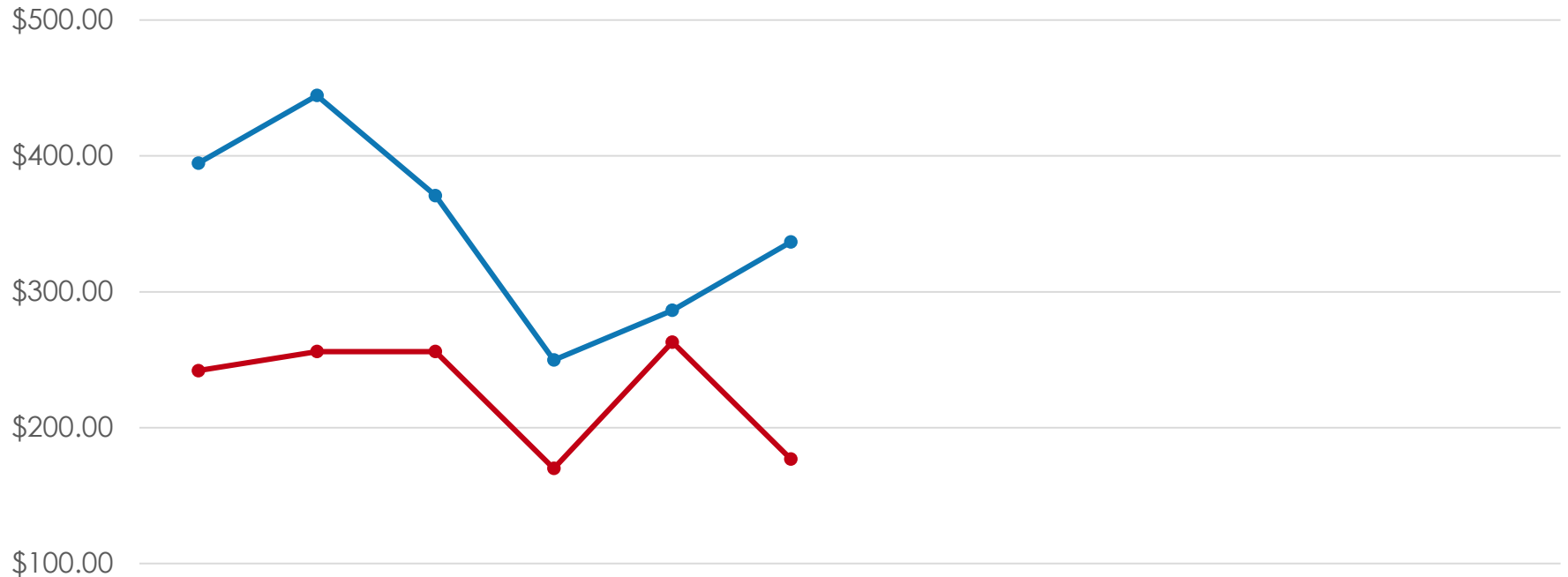
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$394.68	$444.49	$370.79	$249.85	$286.33	$336.64						
MEDIAN	$242.00	$256.00	$256.00	$170.00	$263.00	$177.00						

[A]

On-Island Expenditures

- $936.57 = overall mean average prepaid expense (for entire travel party size) by respondent

- $397.56 = overall mean average <u>per person</u> prepaid expenditures

[A]

On-Island Entire Travel Party – FY2017 Tracking
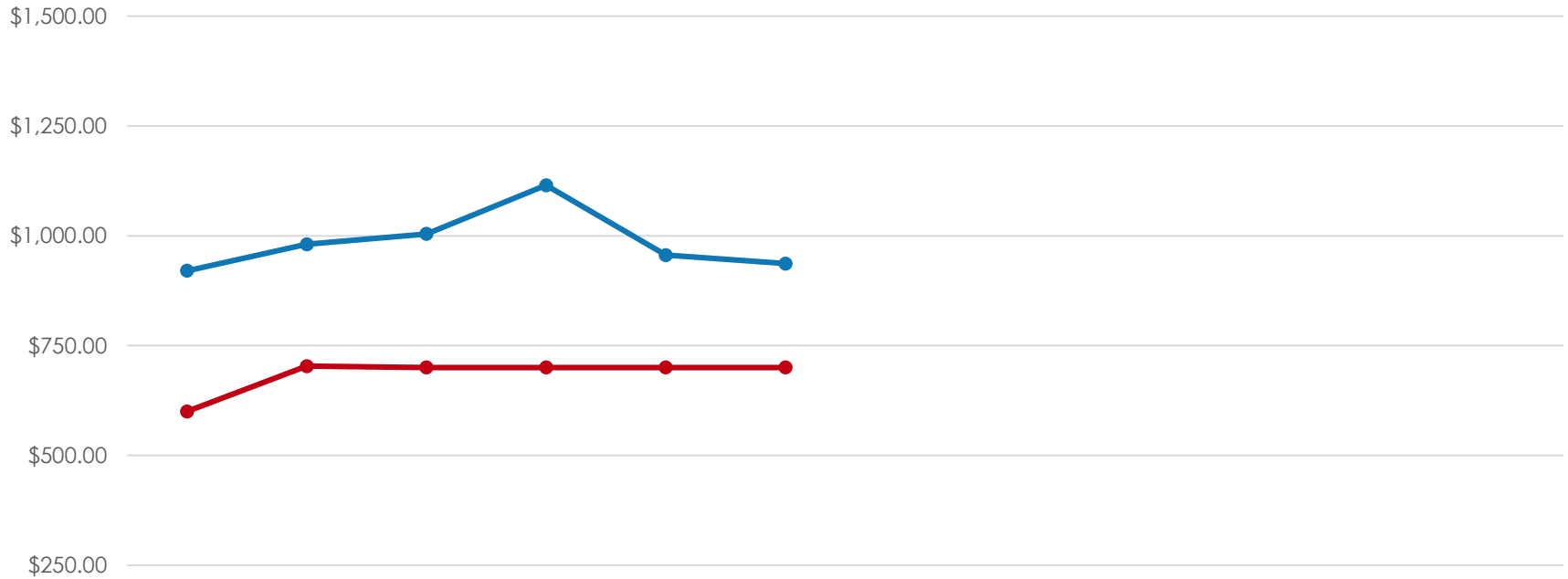
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$920.41	$980.55	$1,004.0	$1,114.8	$955.97	$936.57						
MEDIAN	$600.00	$703.00	$700.00	$700.00	$700.00	$700.00						

[A]

On-Island Per Person – FY2017 Tracking
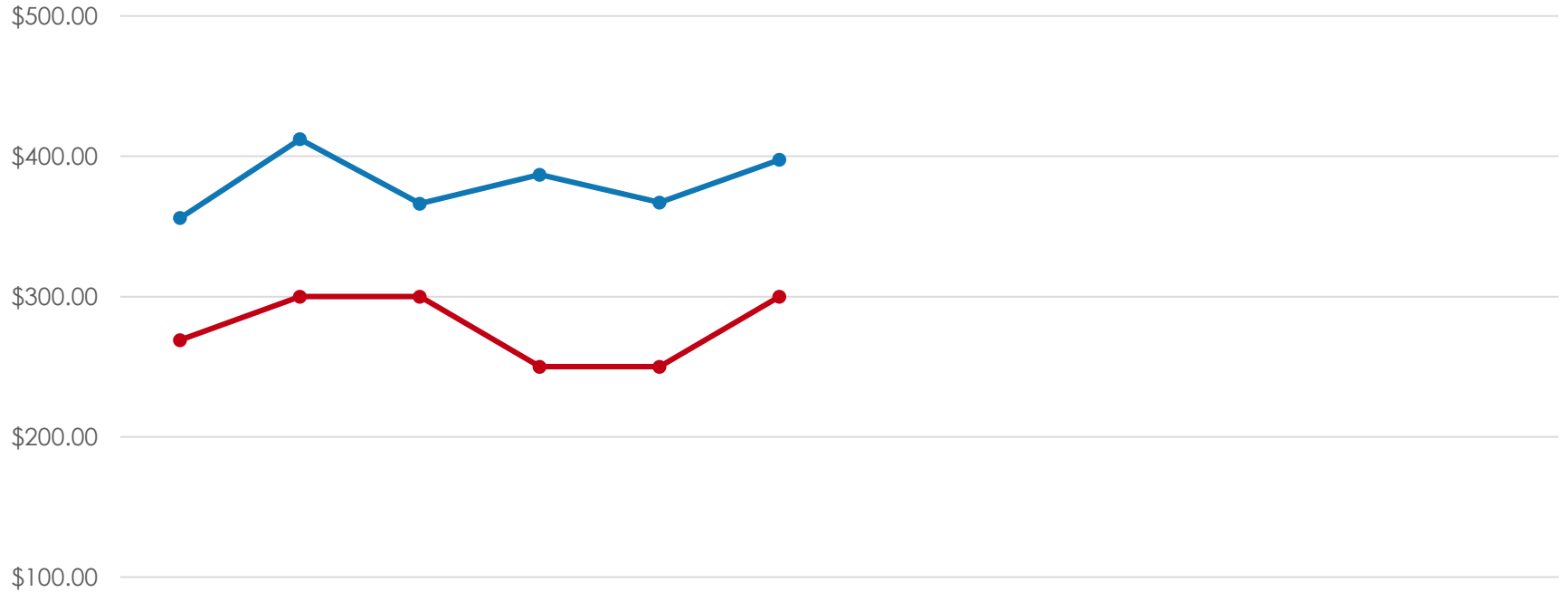
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$356.05	$412.21	$366.24	$386.94	$367.09	$397.56						
MEDIAN	$269.00	$300.00	$300.00	$250.00	$250.00	$300.00						

[A]

On-Island Per Person – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q11A How much in total did you spend while on Guam during this trip?

PER PERSON

		TOTAL	FIT	MICE	HONEY-MOON	WEDDING	LEISURE TRAVELER	FAMILY	GROUP TOUR	REPEAT VISITOR
		-	-	-	-	-	-	-	-	-
ONISLE PP	Mean	$397.56	$418.91	$223.21	$291.43	$100.00	$407.99	$376.35	$244.40	$316.81
	Median	$300	$333	$200	$90	$100	$300	$269	$62	$233

Prepared by QMark Research

[A]

Per Person MEAN expenditures – FY2017 Tracking On-Island/ Prepaid
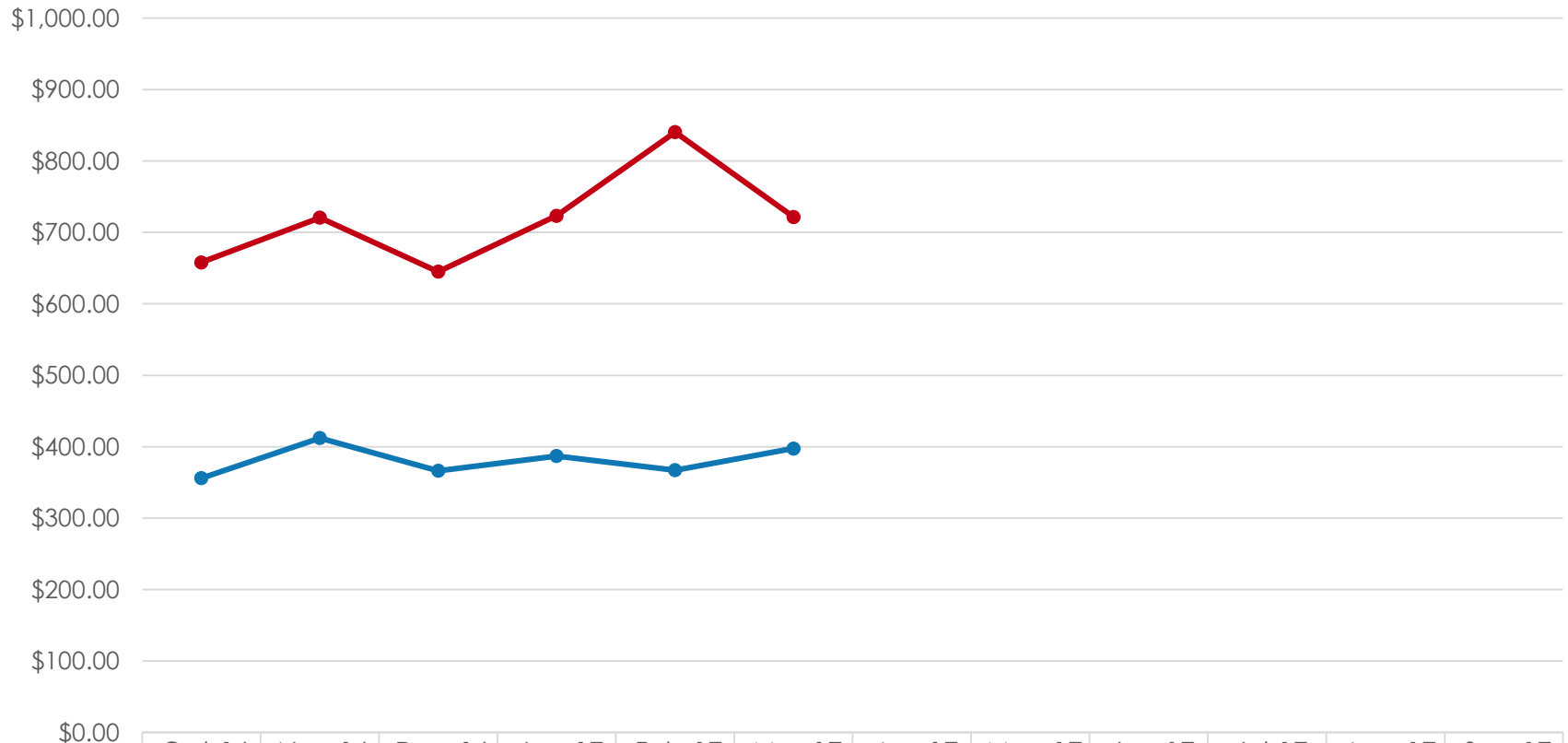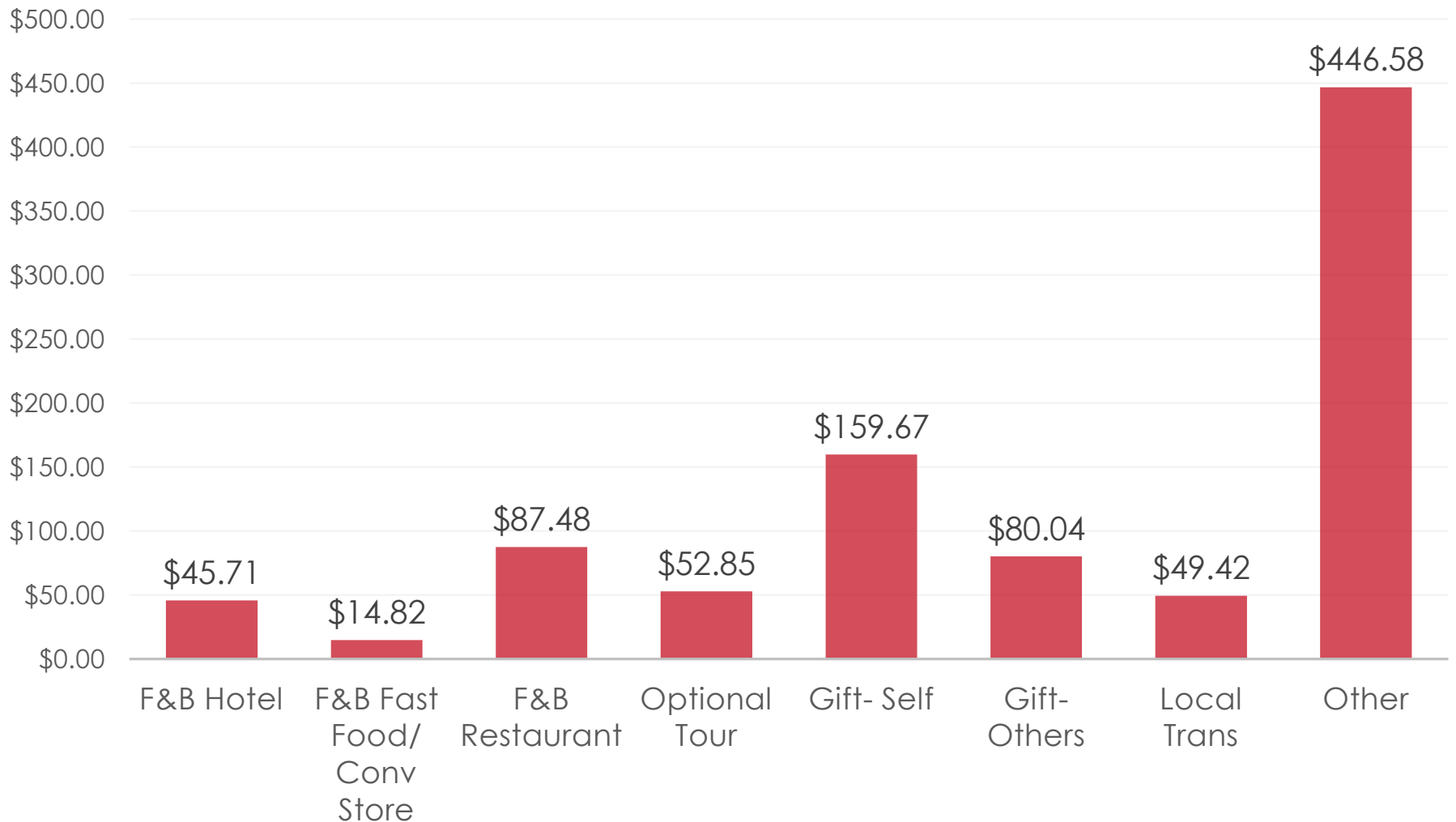

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
On-Island	$356.05	$412.21	$366.24	$386.94	$367.09	$397.56						
Prepaid	$658.04	$720.62	$645.02	$723.26	$840.37	$721.76						

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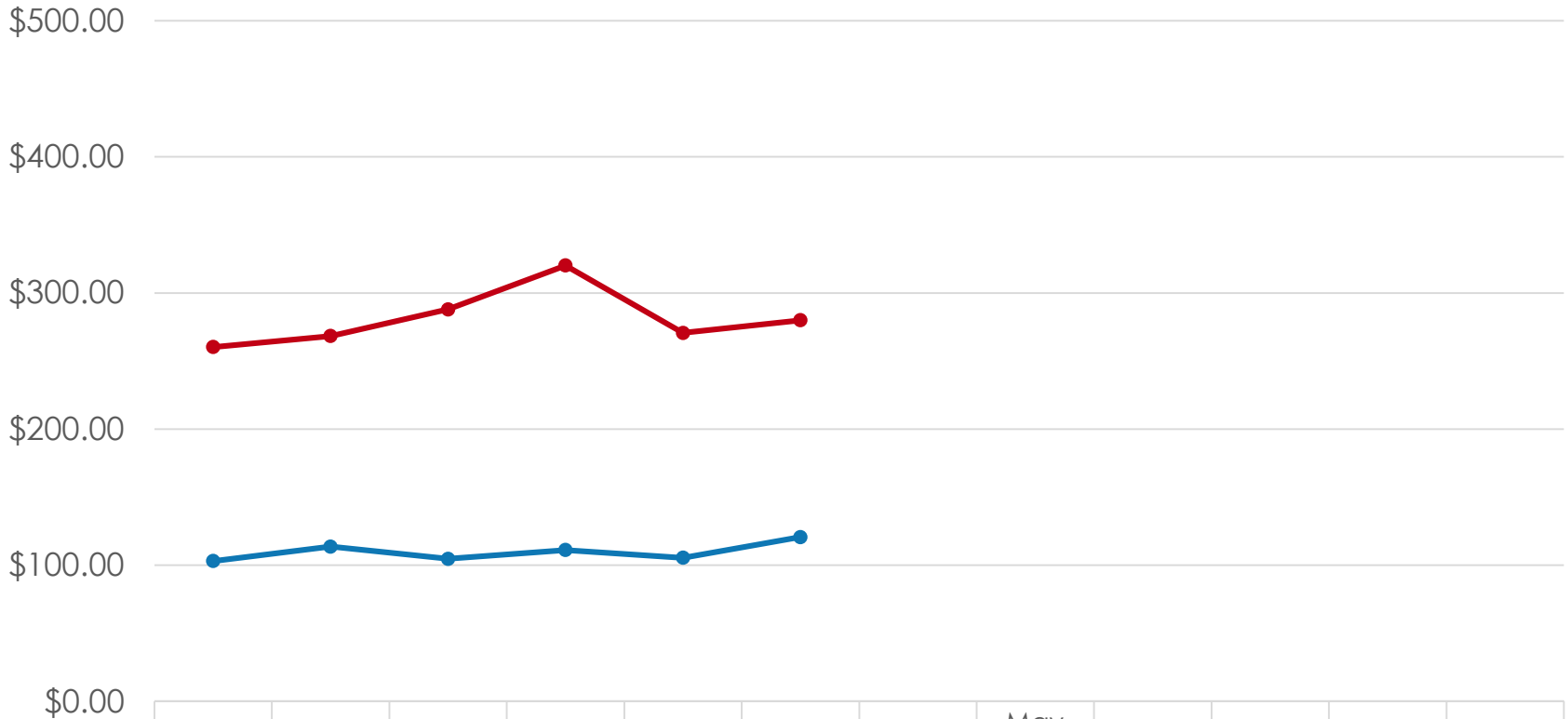
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Per Person	$103.06	$113.69	$104.72	$111.17	$105.45	$120.60						
Travel Party	$260.30	$268.39	$287.95	$320.20	$270.68	$279.99						

[A]

On-Island Expenses by Category – MEAN Entire Travel Party

Bar chart showing mean on-island expenses by category:
- F&B Hotel: $45.71
- F&B Fast Food/Conv Store: $14.82
- F&B Restaurant: $87.48
- Optional Tour: $52.85
- Gift- Self: $159.67
- Gift- Others: $80.04
- Local Trans: $49.42
- Other: $446.58

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						

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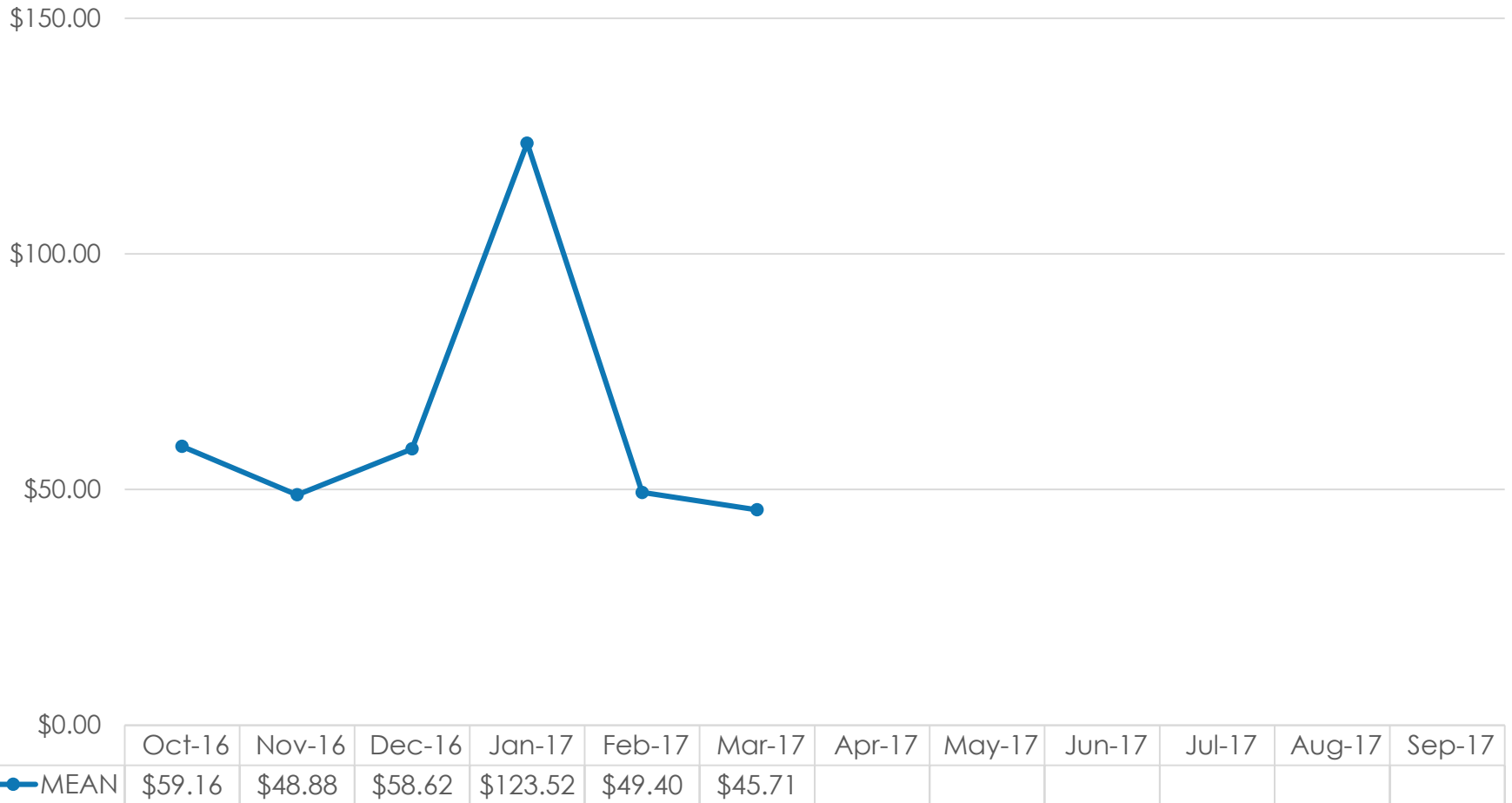
On-Island – FY2017 Tracking
Food & Beverage – Fast Food/ Convenience Store

	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						

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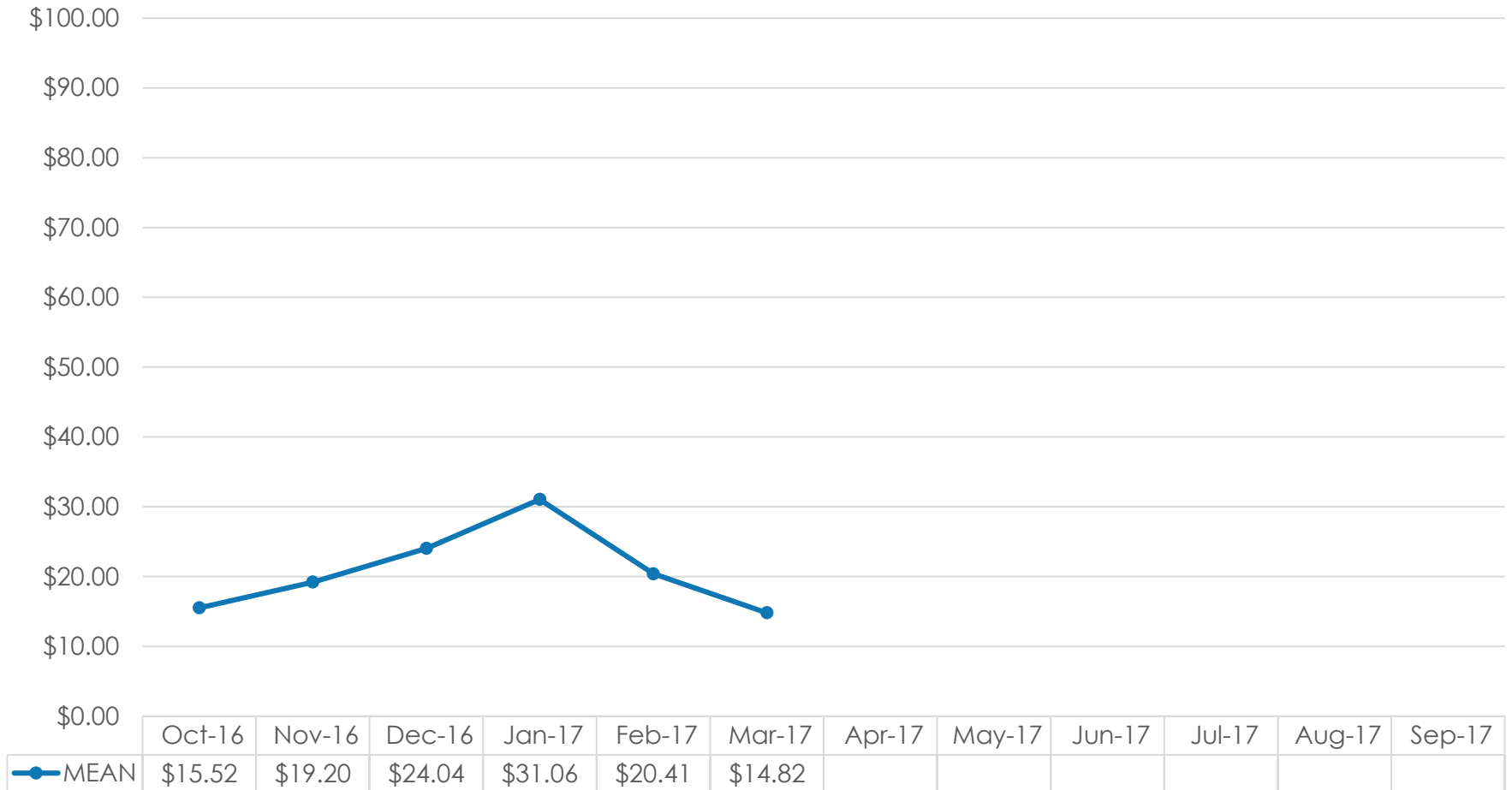
On-Island – FY2017 Tracking
Food & Beverage – Restaurant/ Drinking Est Outside Hotel

	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						
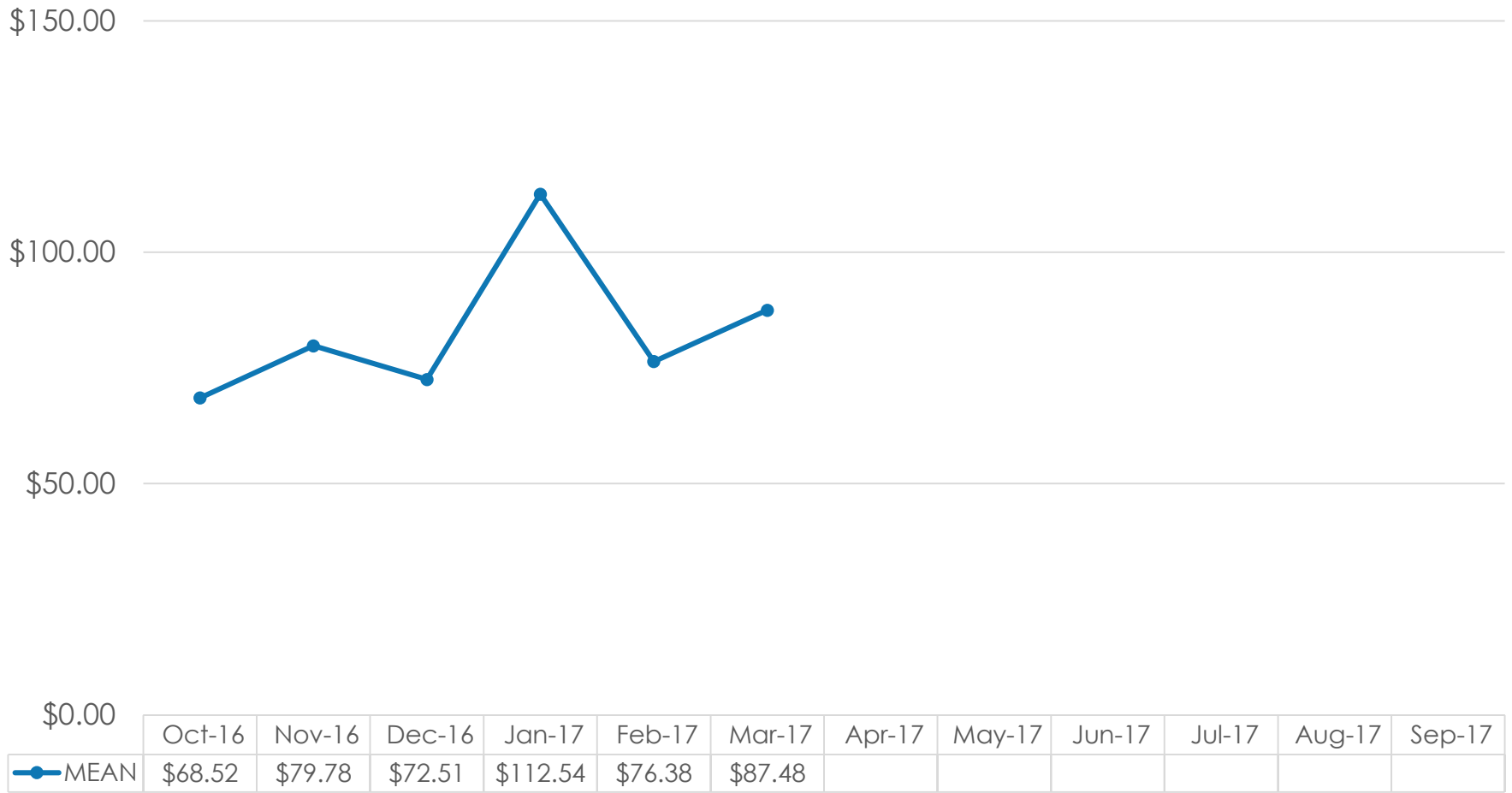
On-Island – FY2017 Tracking
Optional tour/ Activities

	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						
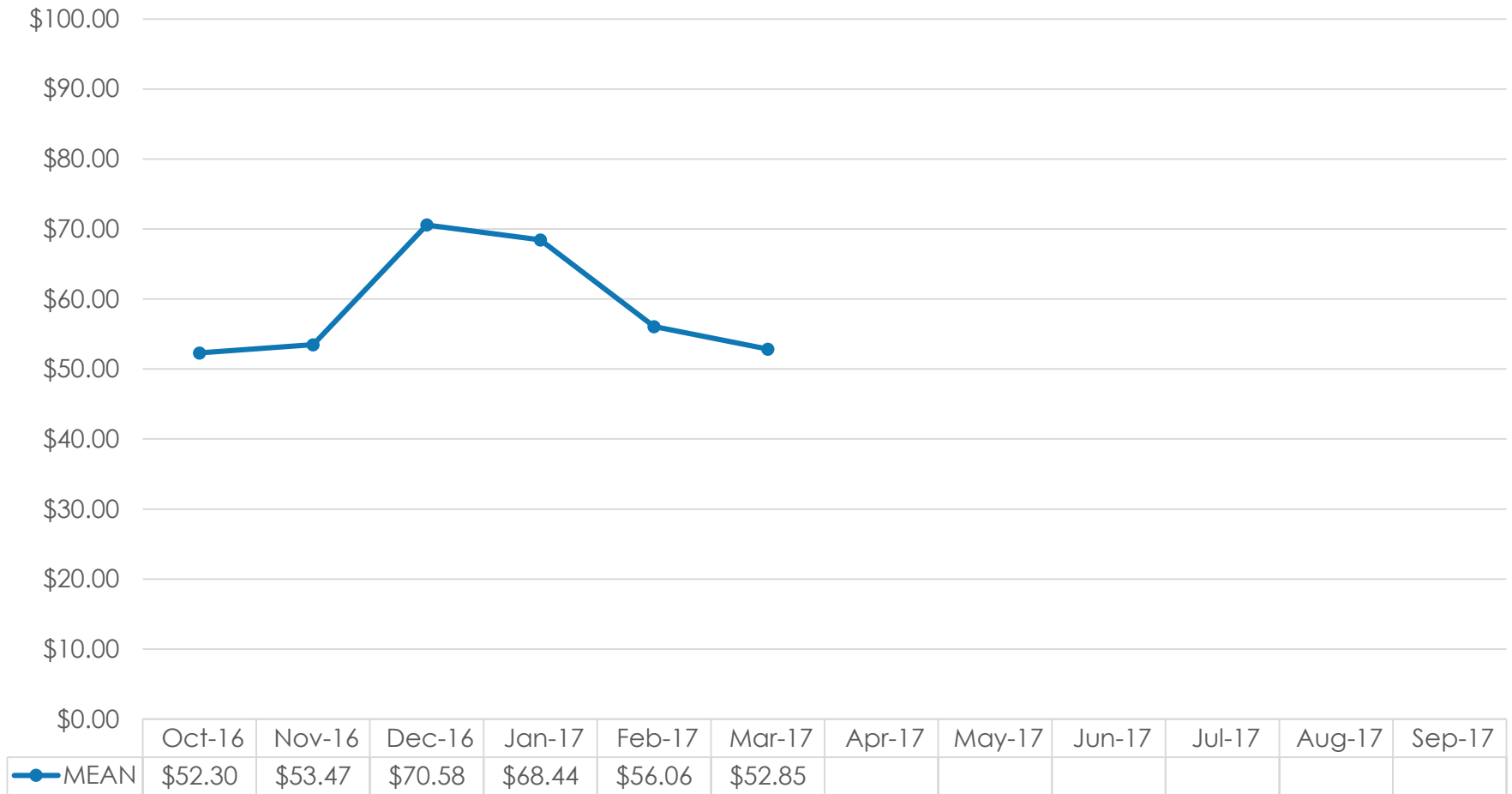
On-Island – FY2017 Tracking
Gift/ Souvenir – Self/ Companion

	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						
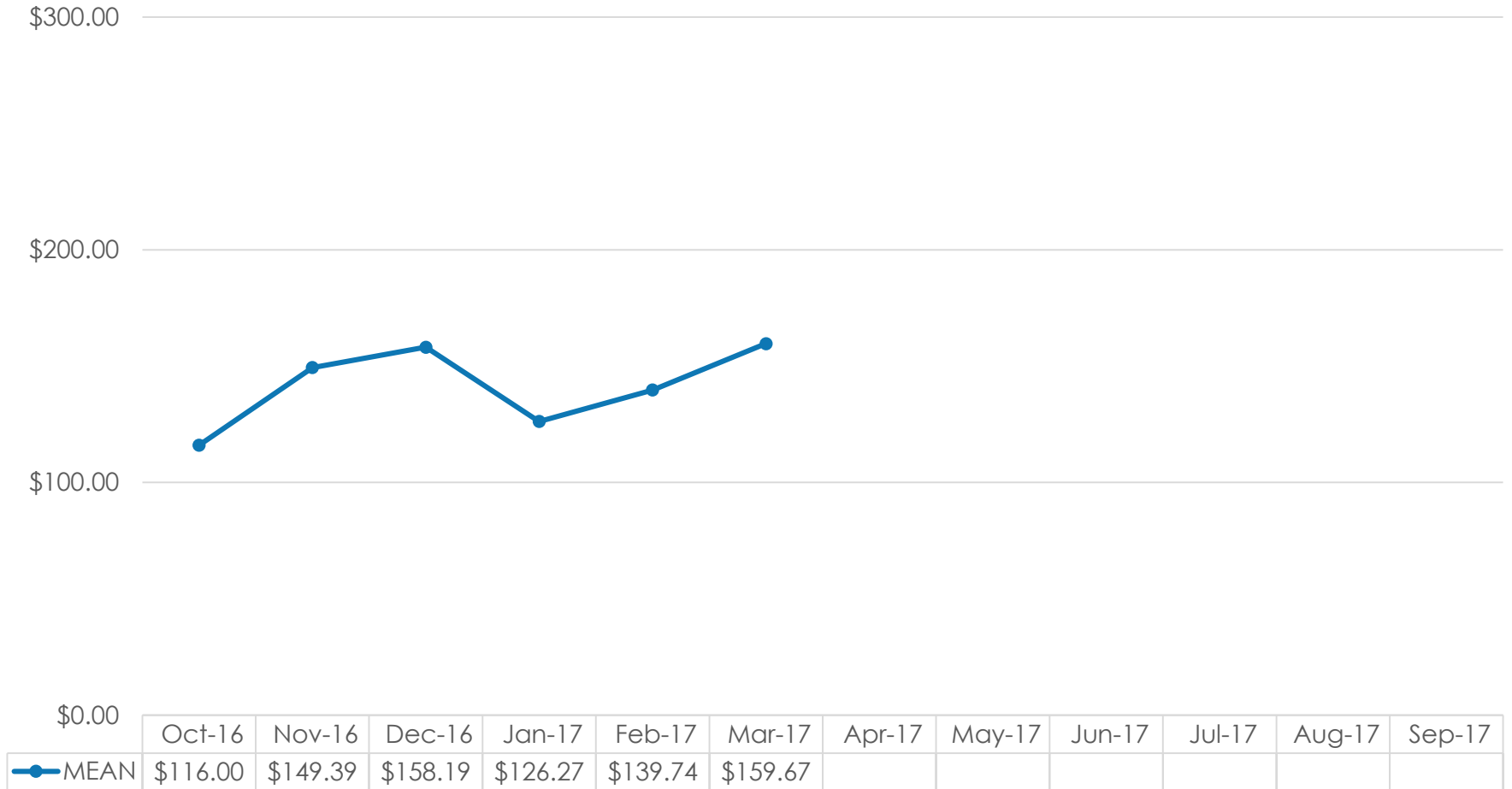
On-Island – FY2017 Tracking
Gift/ Souvenir – Friends/ Family

	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						

[A]
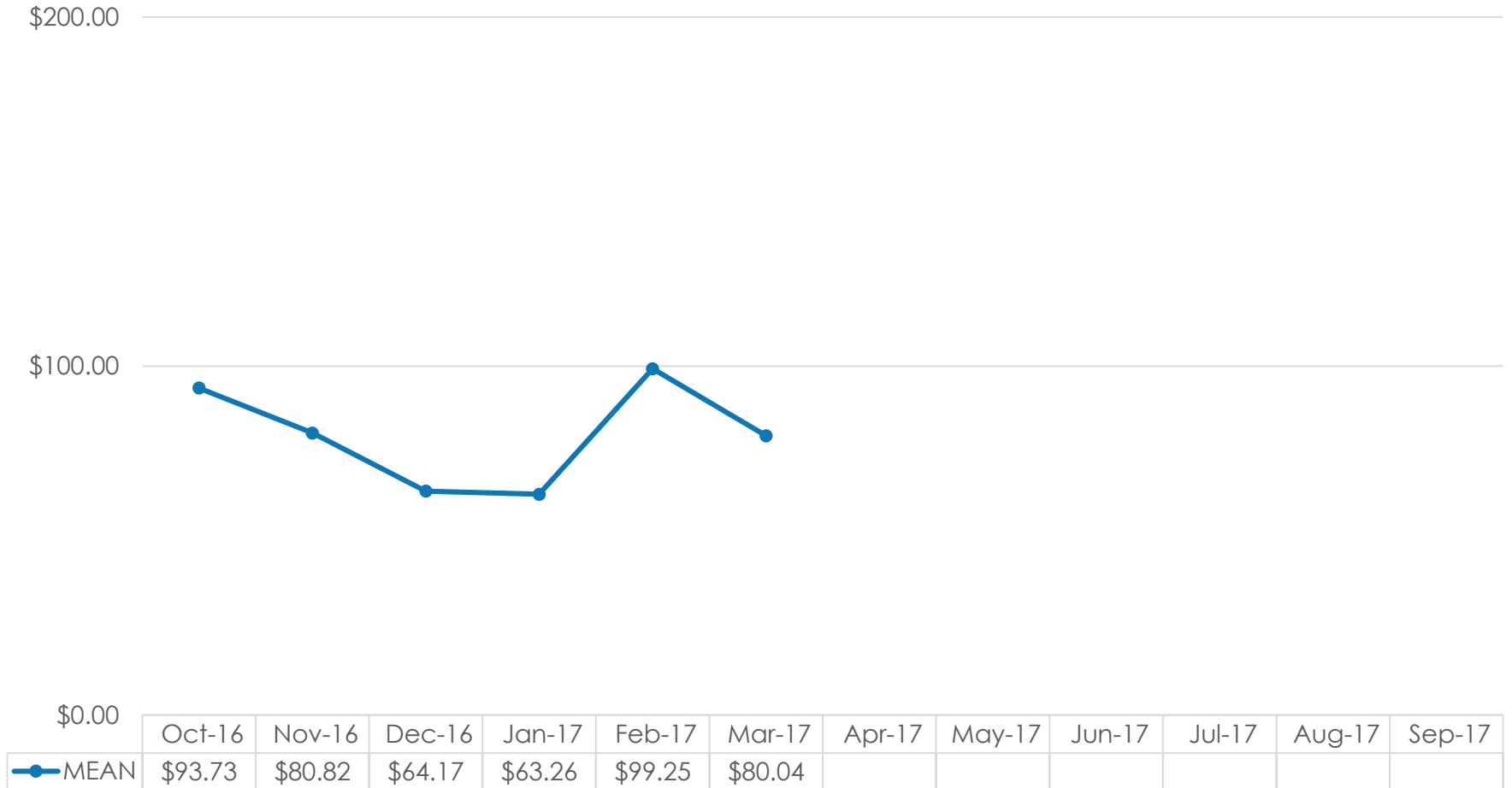
On-Island – FY2017 Tracking
Local Transportation

	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						

[A]
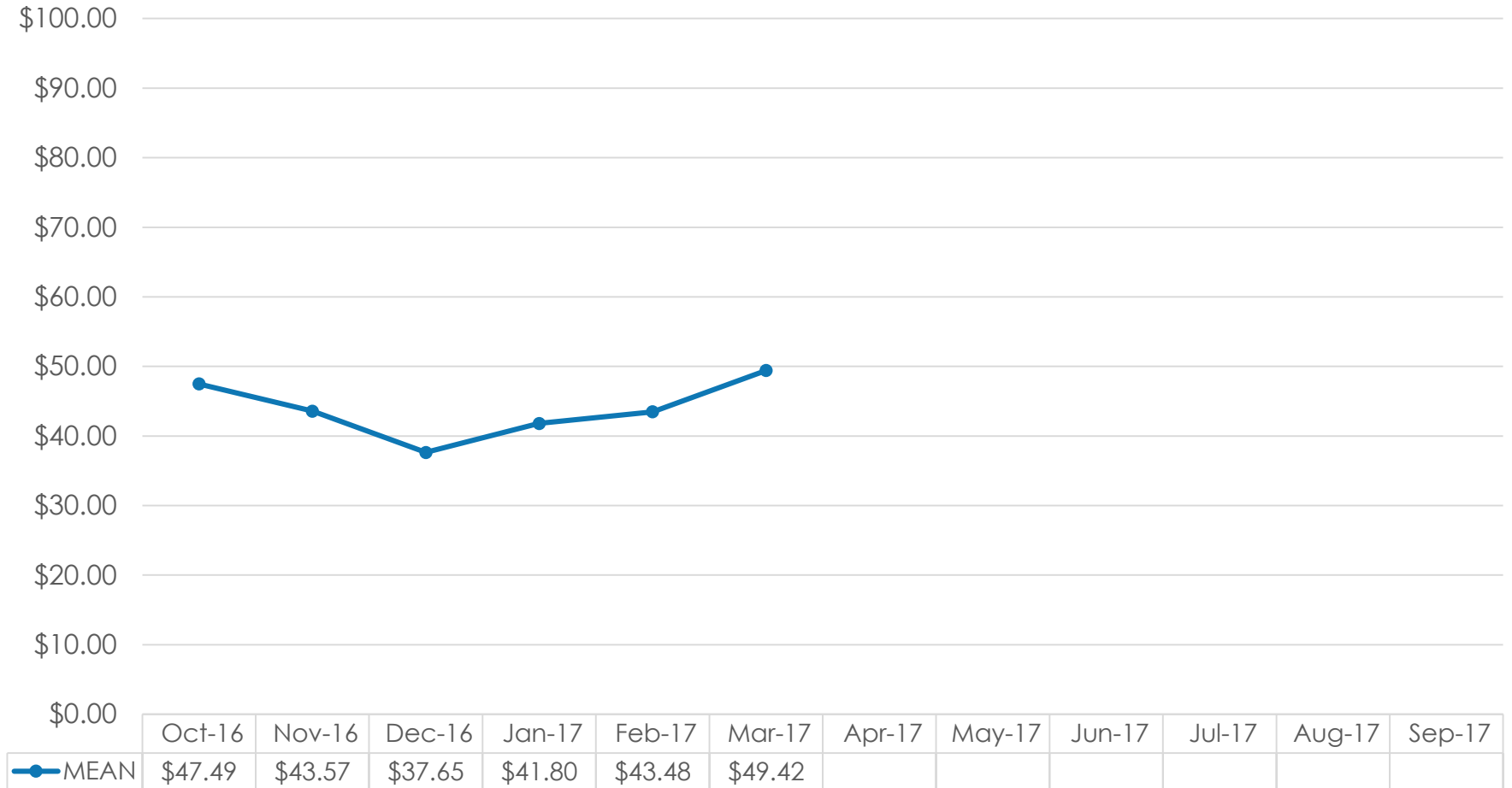
On-Island – FY2017 Tracking
Other Not Included

	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						

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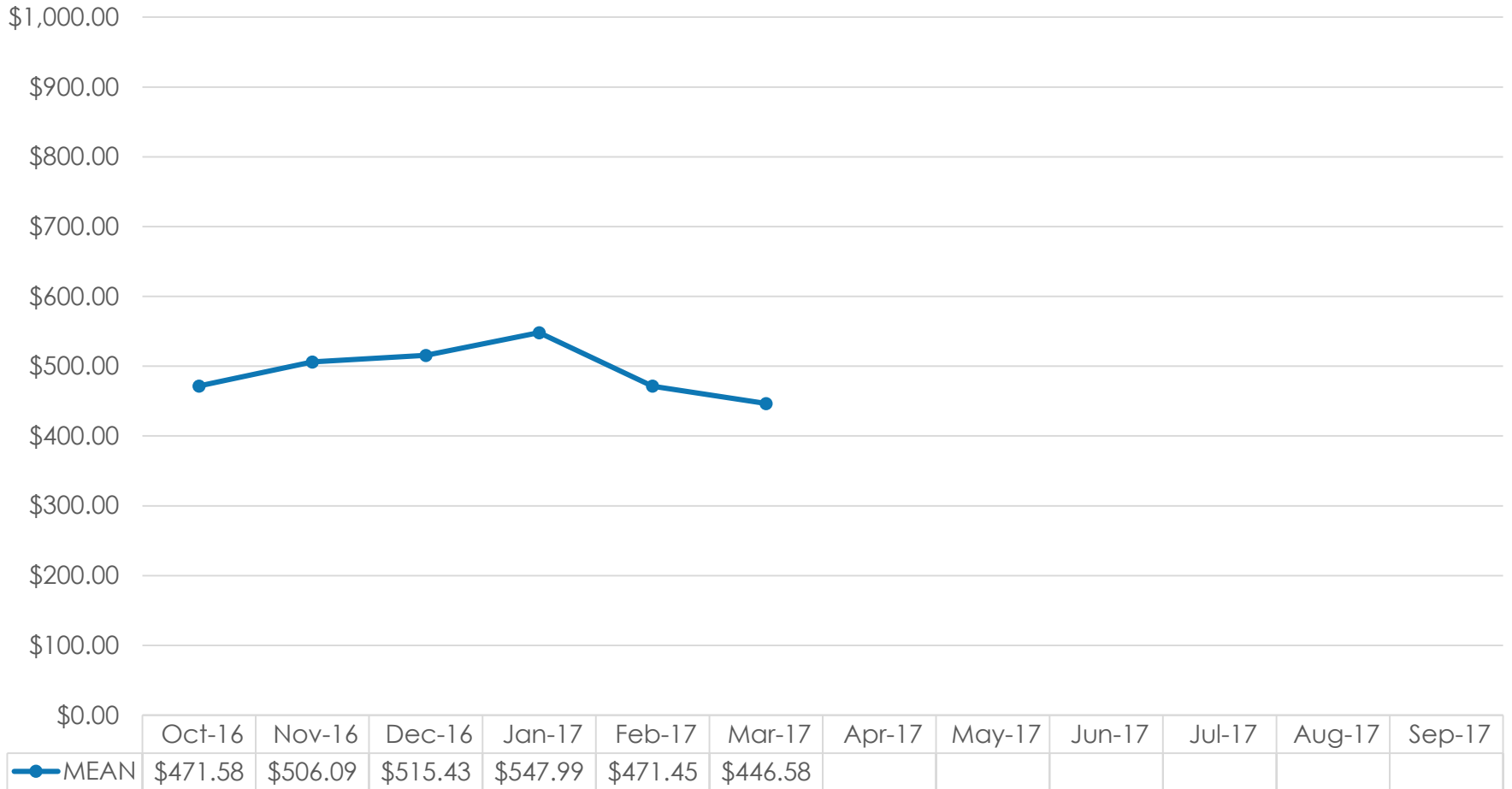
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- $1,119.32 = overall mean average prepaid & on-isle expense by respondent

[A]

TOTAL Per Person Expenditures – FY2017 Tracking
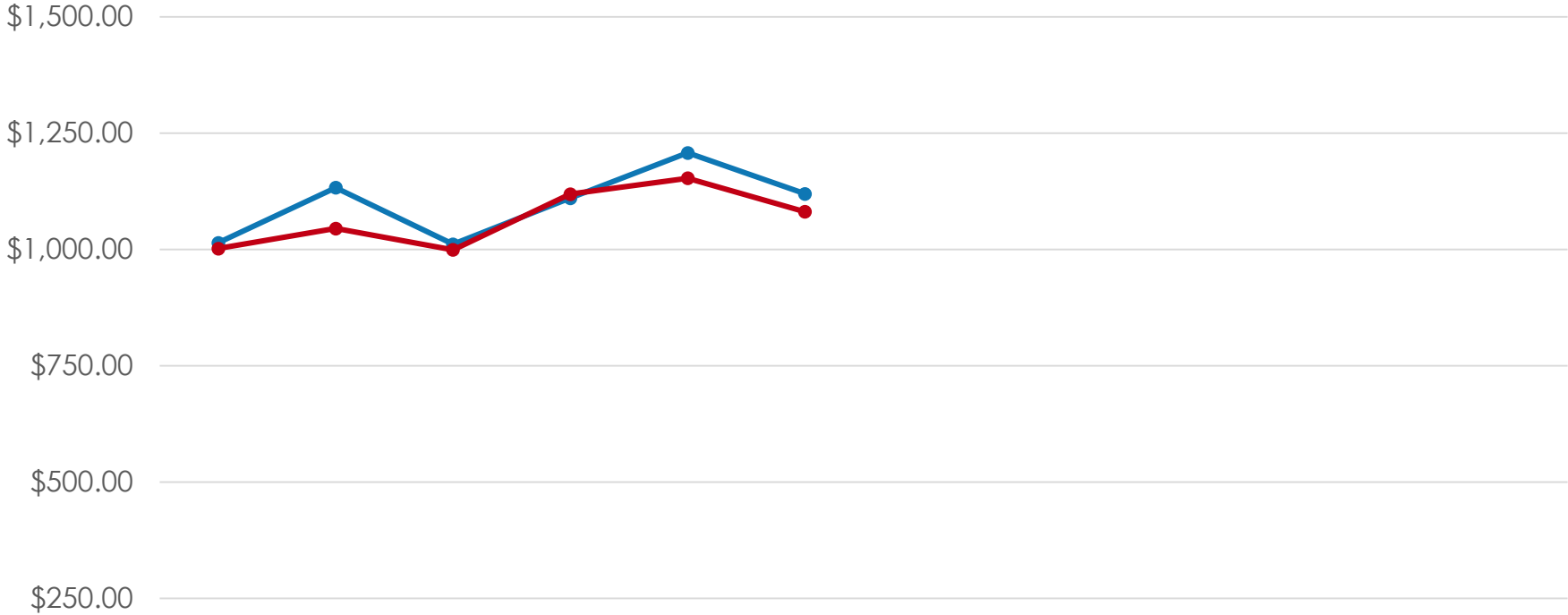
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	$1,014.09	$1,132.84	$1,011.26	$1,110.20	$1,207.47	$1,119.32						
MEDIAN	$1,002.00	$1,045.00	$999.00	$1,119.00	$1,153.00	$1,081.00						

[A]

TOTAL Per Person Expenditures – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

TOTAL EXPENDITURES (On-Isle / Prepaid)

PER PERSON

		TOTAL	FIT	MICE	HONEY-MOON	WEDDING	LEISURE TRAVELER	FAMILY	GROUP TOUR	REPEAT VISITOR
		-	-	-	-	-	-	-	-	-
TOTAL PP	Mean	$1,119.32	$1,084.13	$831.85	$1,256.26	$1,203.57	$1,134.65	$1,082.97	$600.19	$970.20
	Median	$1,081	$1,050	$586	$1,414	$1,204	$1,092	$1,054	$200	$1,024

Prepared by QMark Research

[A]

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						

[A]
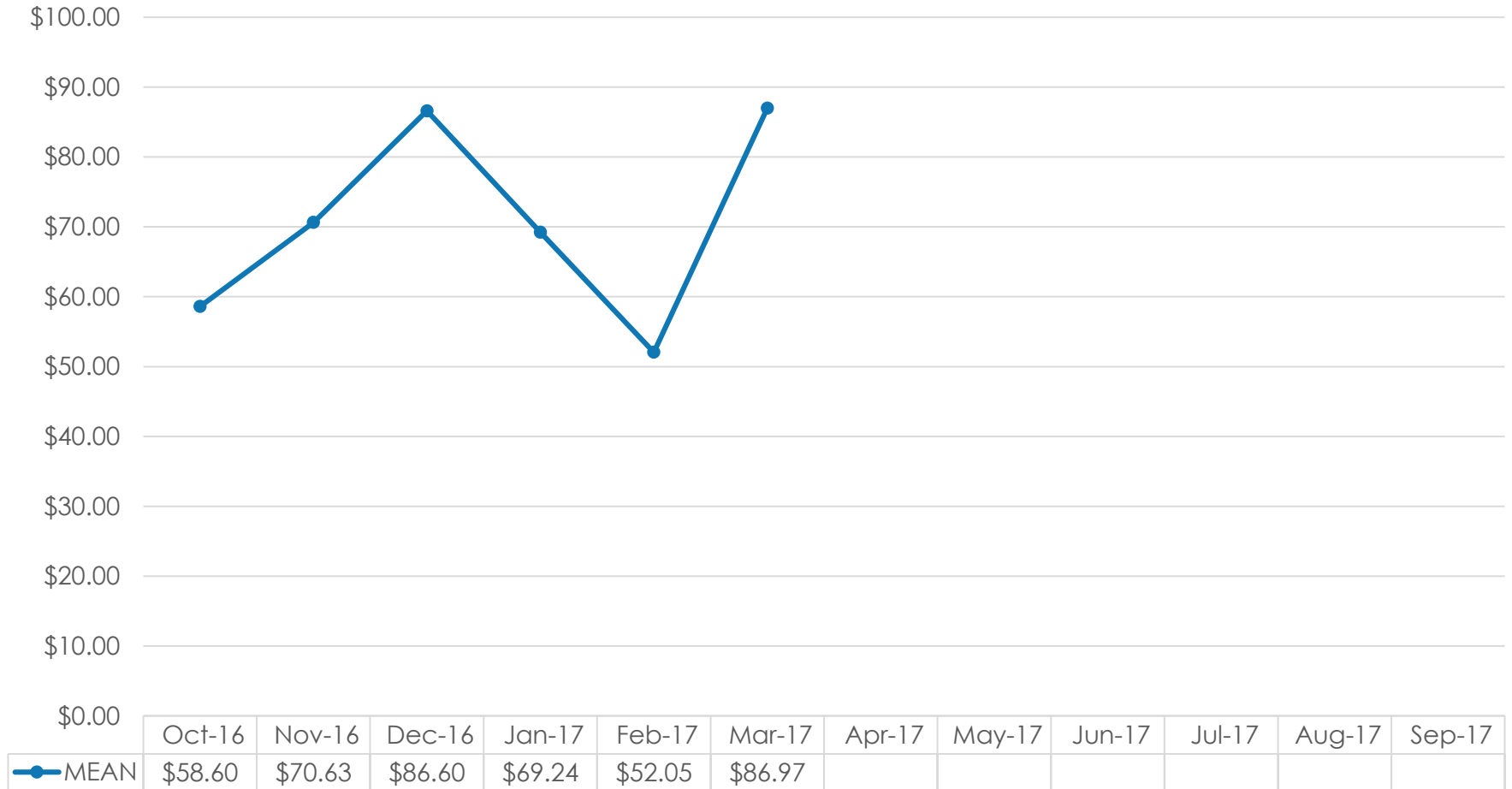
SECTION 4
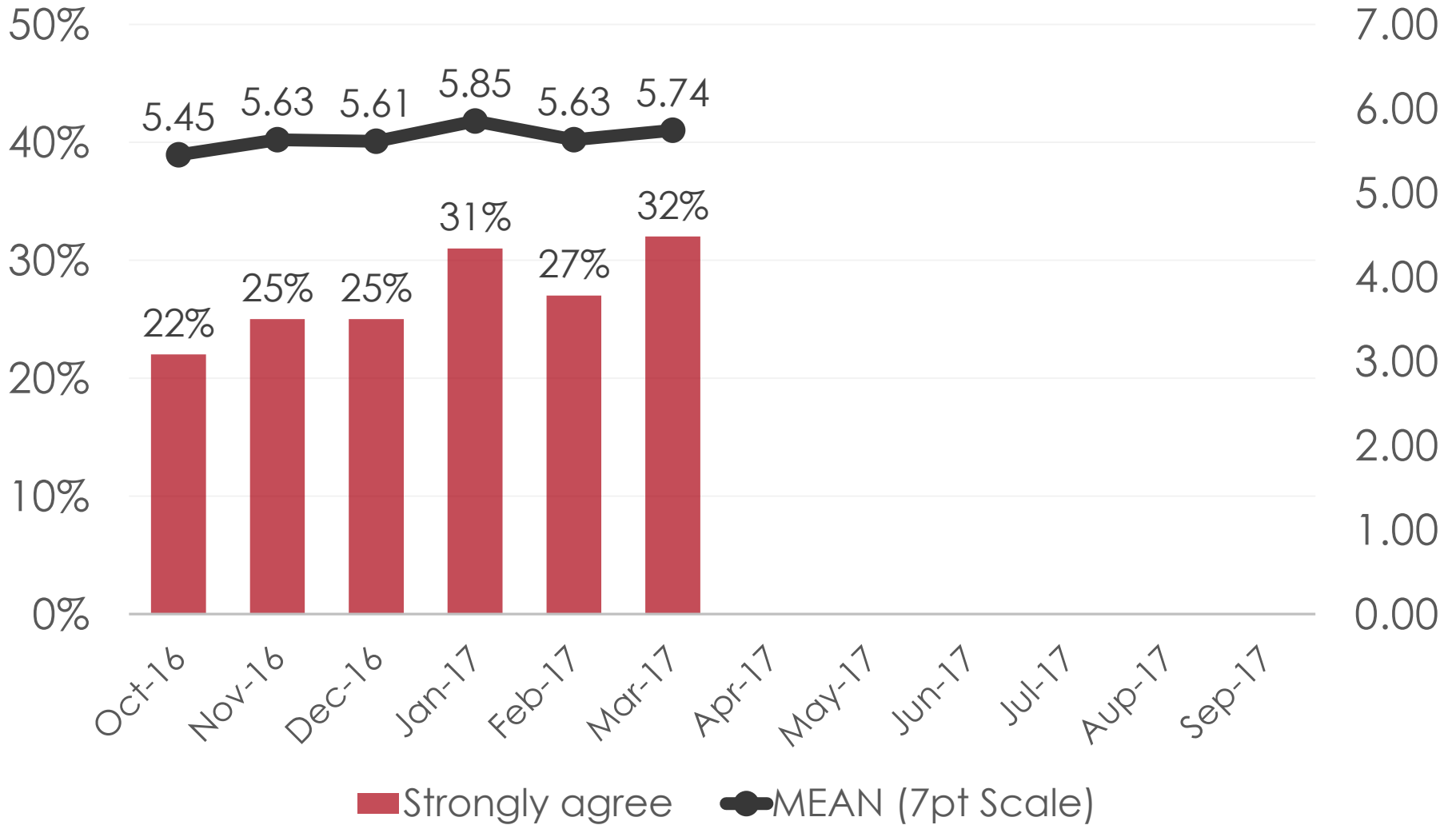# VISITOR SATISFACTION BEHAVIOR

[A]

OVERALL SATISFACTION

Guam was better than expected

5.59 5.80 5.87 6.02 5.85 5.95

39%
38%
33% 33%
31%
25%

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]

I had no communication problems

Values shown on chart:

Month	Strongly agree	MEAN (7pt Scale)
Oct-16	12%	5.02
Nov-16	17%	5.05
Dec-16	17%	5.25
Jan-17	23%	5.49
Feb-17	18%	5.30
Mar-17	22%	5.41

Legend: Strongly agree — MEAN (7pt Scale)

[A]

I will recommend Guam to friends

Legend: Strongly agree — MEAN (7pt Scale)

Sites on Guam were attractive

Legend: Strongly agree | MEAN (7pt Scale)

I plan to visit Guam again

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17
Strongly agree	25%	29%	30%	35%	28%	35%
MEAN (7pt Scale)	5.44	5.73	5.72	5.77	5.56	5.67

Strongly agree — MEAN (7pt Scale)

[A]

Not enough night time activities

Strongly agree — MEAN (7pt Scale)

Tour guides were professional

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

Month	Strongly agree	MEAN (7pt Scale)
Oct-16	25%	5.48
Nov-16	22%	5.36
Dec-16	23%	5.47
Jan-17	25%	5.53
Feb-17	24%	5.42
Mar-17	24%	5.34
Apr-17		
May-17		
Jun-17		
Jul-17		
Aup-17		
Sep-17		

Legend: Strongly agree, MEAN (7pt Scale)

[A]

Tour drivers were professional

50%

40%

30%

20%

10%

0%

5.54 5.42 5.46 5.57 5.44 5.41

25% 22% 22% 23% 24% 24%

7.00

6.00

5.00

4.00

3.00

2.00

1.00

0.00

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 ━●━ MEAN (7pt Scale)

[A]

Taxi drivers were professional

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

Month	Strongly agree	MEAN (7pt Scale)
Oct-16	32%	5.58
Nov-16	26%	5.51
Dec-16	27%	5.61
Jan-17	24%	5.56
Feb-17	24%	5.40
Mar-17	29%	5.49
Apr-17		
May-17		
Jun-17		
Jul-17		
Aup-17		
Sep-17		

Legend: Strongly agree, MEAN (7pt Scale)

[A]

Taxis were clean

Chart legend: Strongly agree (bars), MEAN (7pt Scale) (line)

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17
MEAN (7pt Scale)	5.51	5.37	5.52	5.61	5.39	5.37
Strongly agree	28%	24%	27%	24%	24%	28%

[A]

Guam airport was clean

Legend: Strongly agree (bars), MEAN (7pt Scale) (line)

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17
MEAN (7pt Scale)	5.36	4.94	5.06	5.22	5.23	5.25
Strongly agree	22%	16%	17%	18%	19%	22%

GENERAL SATISFACTION

	Ease of getting around	Safety walking at night	Price of things on Guam
Very Satisfied (Top Box)	23%	20%	16%
MEAN (7pt Scale)	5.20	5.14	4.99

[A]

GENERAL SATISFACTION –
Quality/ Cleanliness

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

Categories: Beaches/ Parks, Air/ Sky, Parks, Landscape Tumon, Landscape Guam, Ground Handler, Transportation vehicle

Top Box values: 29%, 49%, 36%, 37%, 31%, 23%, 23%

Mean values: 5.72, 6.14, 5.81, 5.81, 5.58, 4.96, 5.09

ACCOMMODATIONS –
OVERALL SATISFACTION

Very Satisfied (Top Box) MEAN (7pt Scale)
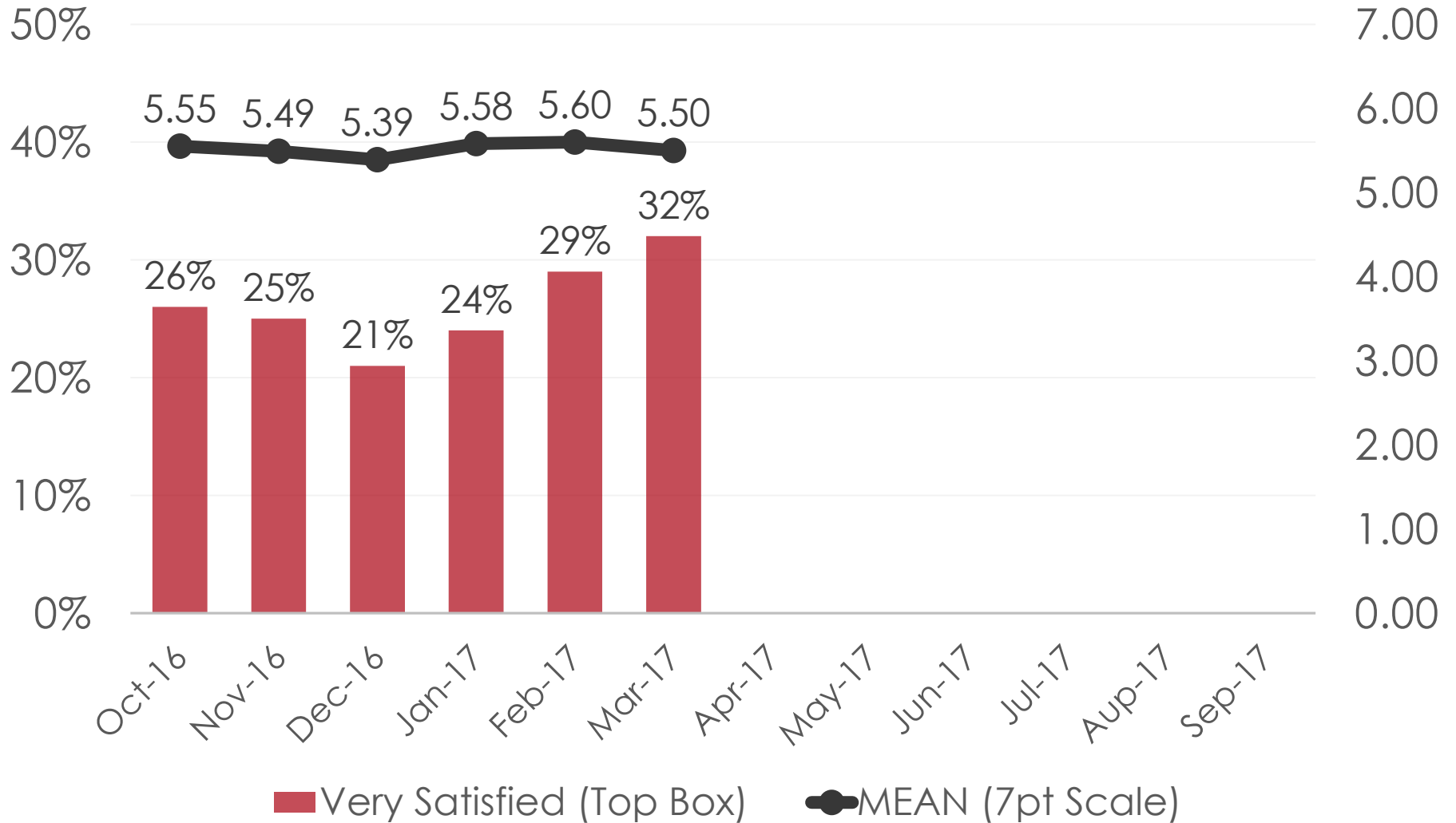
ACCOMMODATIONS –
Satisfaction by Category

Very Satisfied (Top Box): Room 39%, View 56%, Furnishings 27%, Cleanliness 30%, Food- Quality 29%, Food- Quantity 28%, Staff 45%, Service 44%, Value 24%

MEAN (7pt Scale): Room 5.75, View 6.19, Furnishings 5.48, Cleanliness 5.57, Food- Quality 5.48, Food- Quantity 5.47, Staff 6.03, Service 5.97, Value 5.19

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

DINING EXPERIENCE (Outside Hotel) –
Satisfaction by Category

Very Satisfied (Top Box):
- Furnishings: 16%
- Cleanliness: 18%
- Food-Quality: 19%
- Food-Quantity: 15%
- Staff: 28%
- Service: 27%
- Value: 10%

MEAN (7pt Scale):
- Furnishings: 5.13
- Cleanliness: 5.15
- Food-Quality: 5.17
- Food-Quantity: 5.06
- Staff: 5.51
- Service: 5.41
- Value: 4.48

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

[A]

Shopping Malls/ Stores (Top Responses)

Store	Percentage
ABC Store	72%
Guam Premium Outlet	66%
K-Mart	64%
DFS Galleria	60%
Ross	46%
Micro Mall	41%
Macys	27%
JP Super	19%
Tumon Sands	19%
The Plaza	13%

[A]

SHOPPING - SATISFACTION

[A]
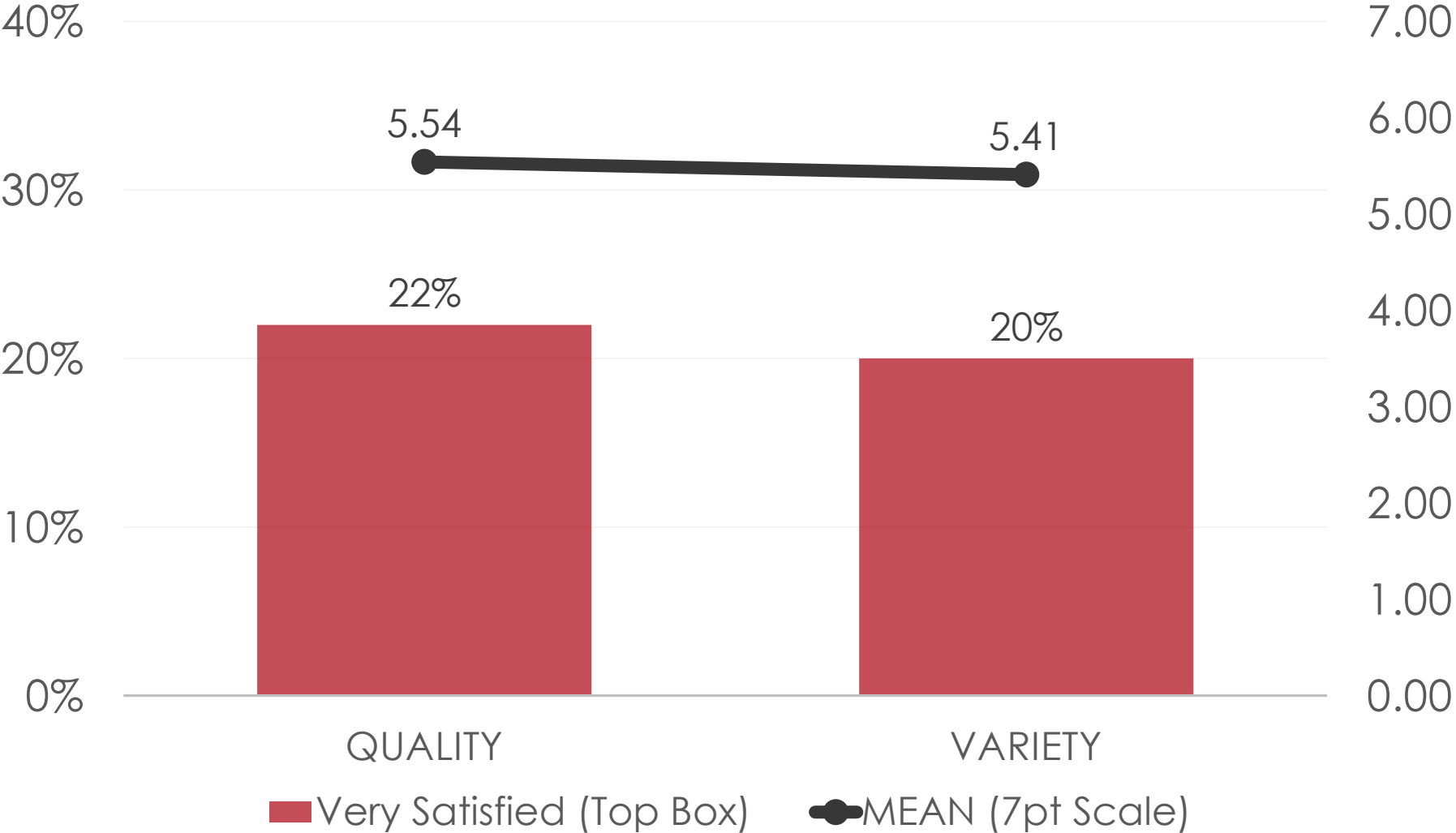
OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

[A]
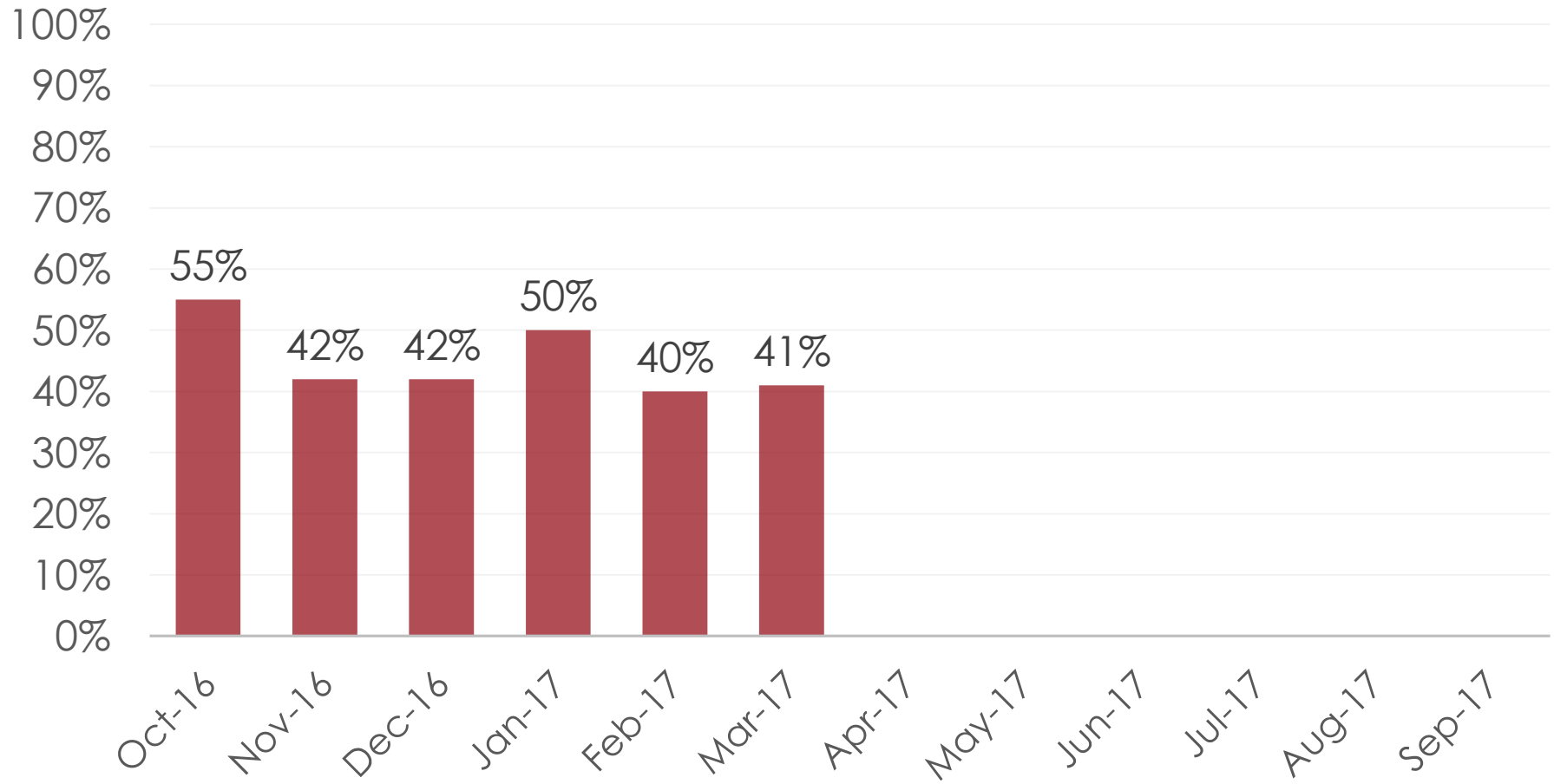
Optional Tour Participation (Top Responses)

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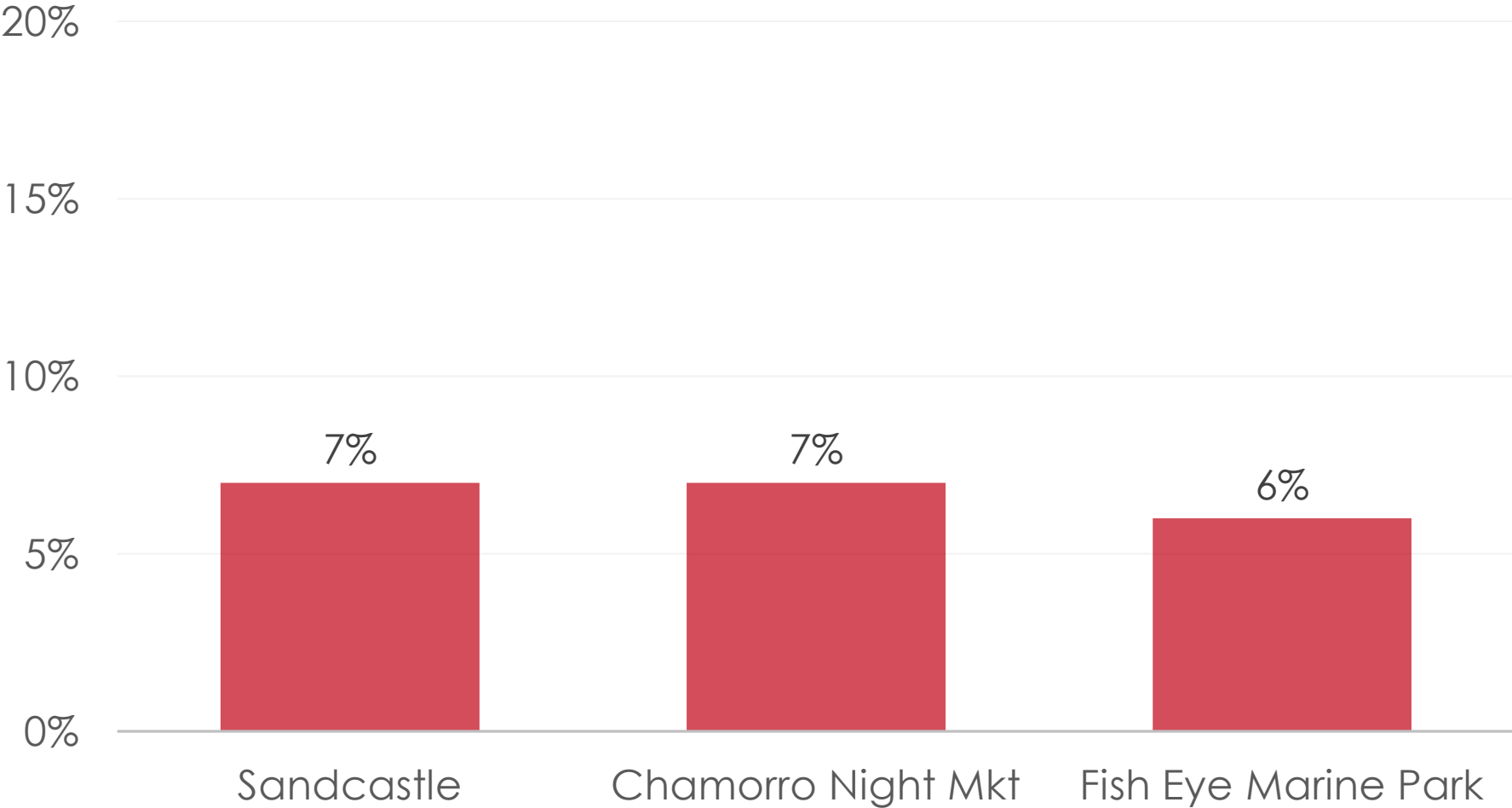
Optional Tour Satisfaction
Top Responses only - Participation (5%+)

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

Chamorro Night Market: 13%, 5.35
Sandcastle: 52%, 6.17
Fish Eye Marine Park: 15%, 5.25

[A]

DAY TOUR - SATISFACTION

Chart showing satisfaction for QUALITY and VARIETY. Very Satisfied (Top Box): QUALITY 21%, VARIETY 18%. MEAN (7pt Scale): QUALITY 5.40, VARIETY 5.23.

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

[A]

NIGHT TOUR - SATISFACTION

QUALITY: 14% — 4.89
VARIETY: 13% — 4.78

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

[A]
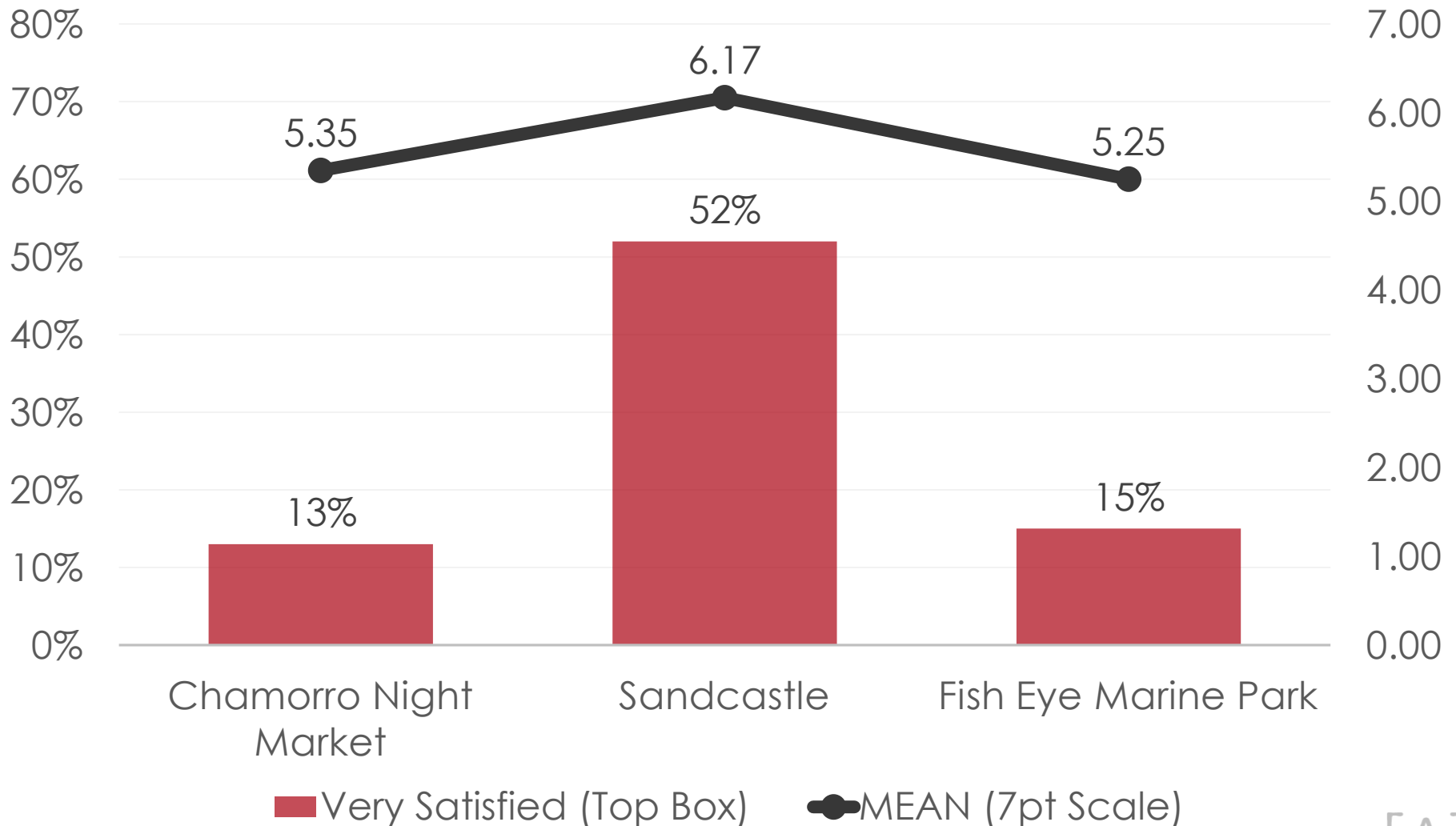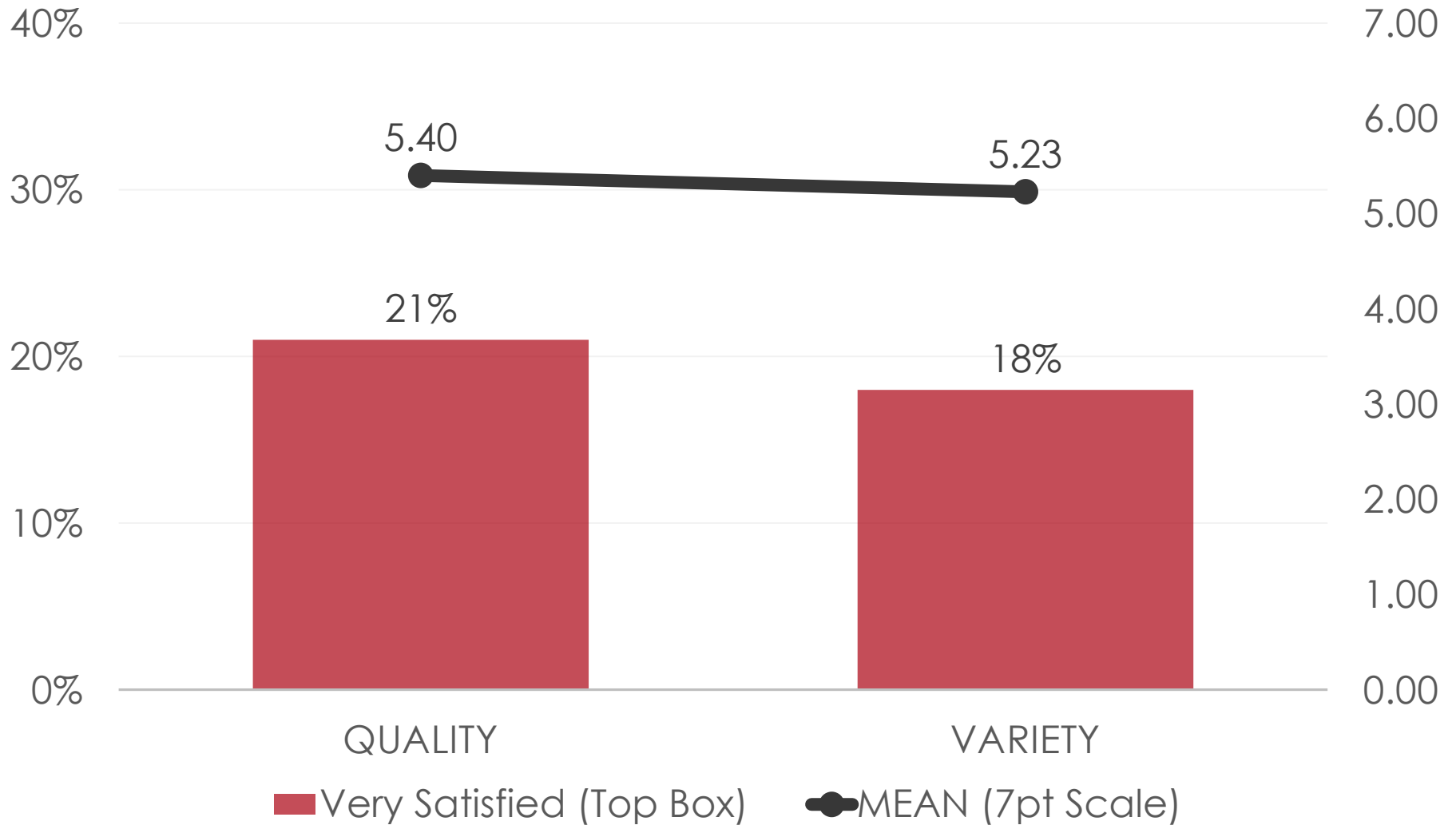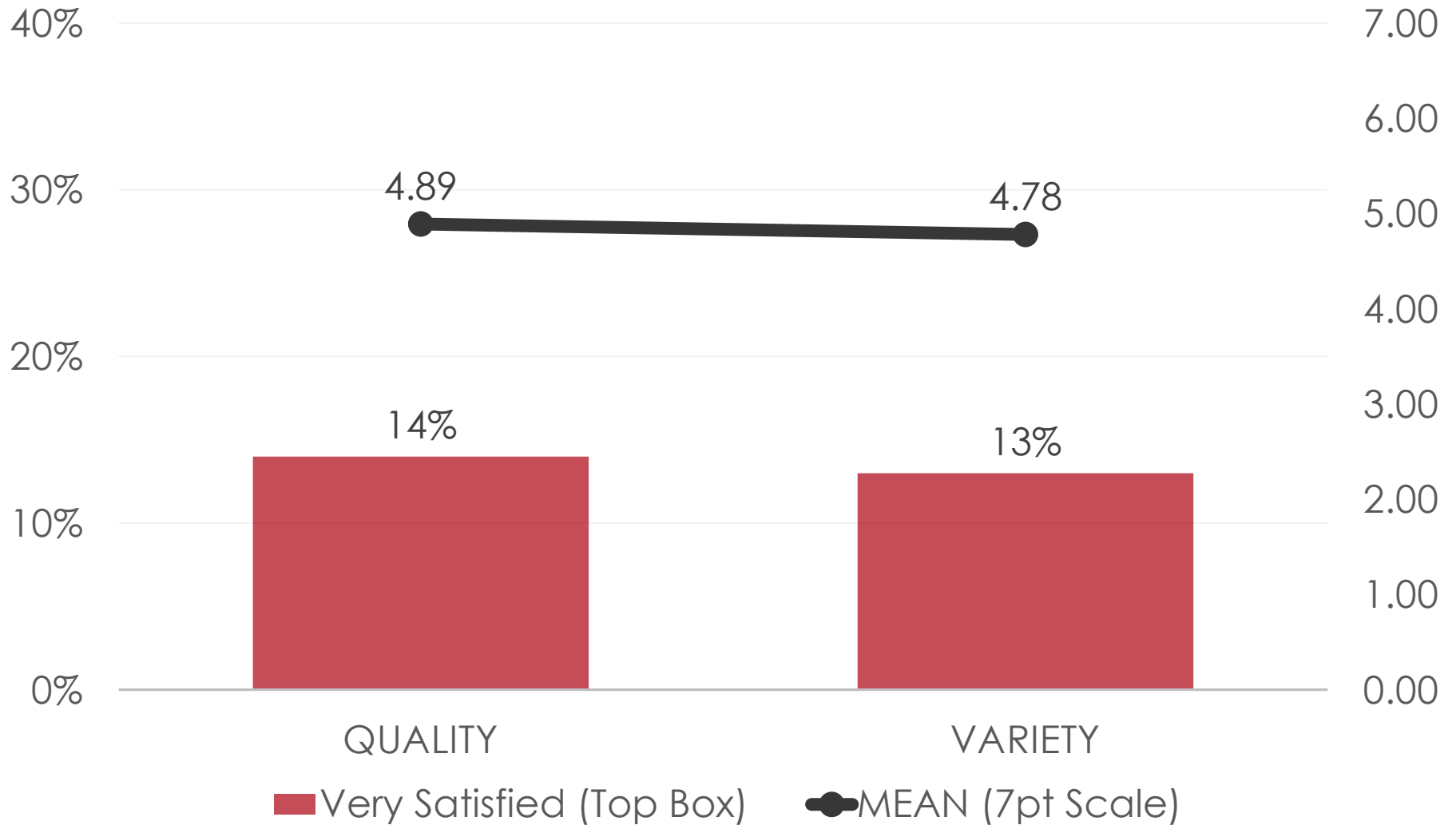
Activities Participation (Top Responses)

[A]
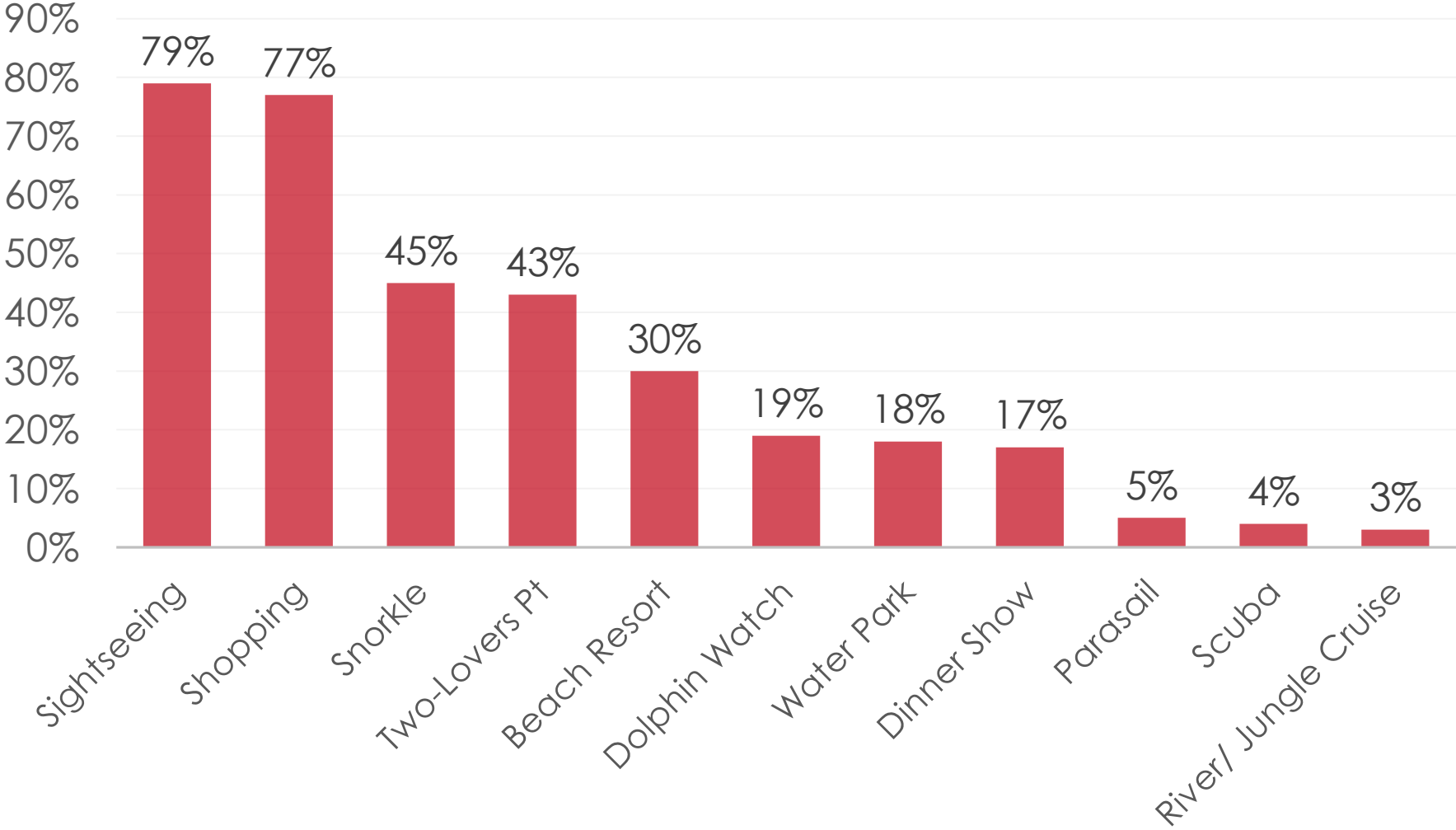
SECTION 5
PROMOTIONS

[A]

INTERNET- GUAM SOURCES OF INFORMATION
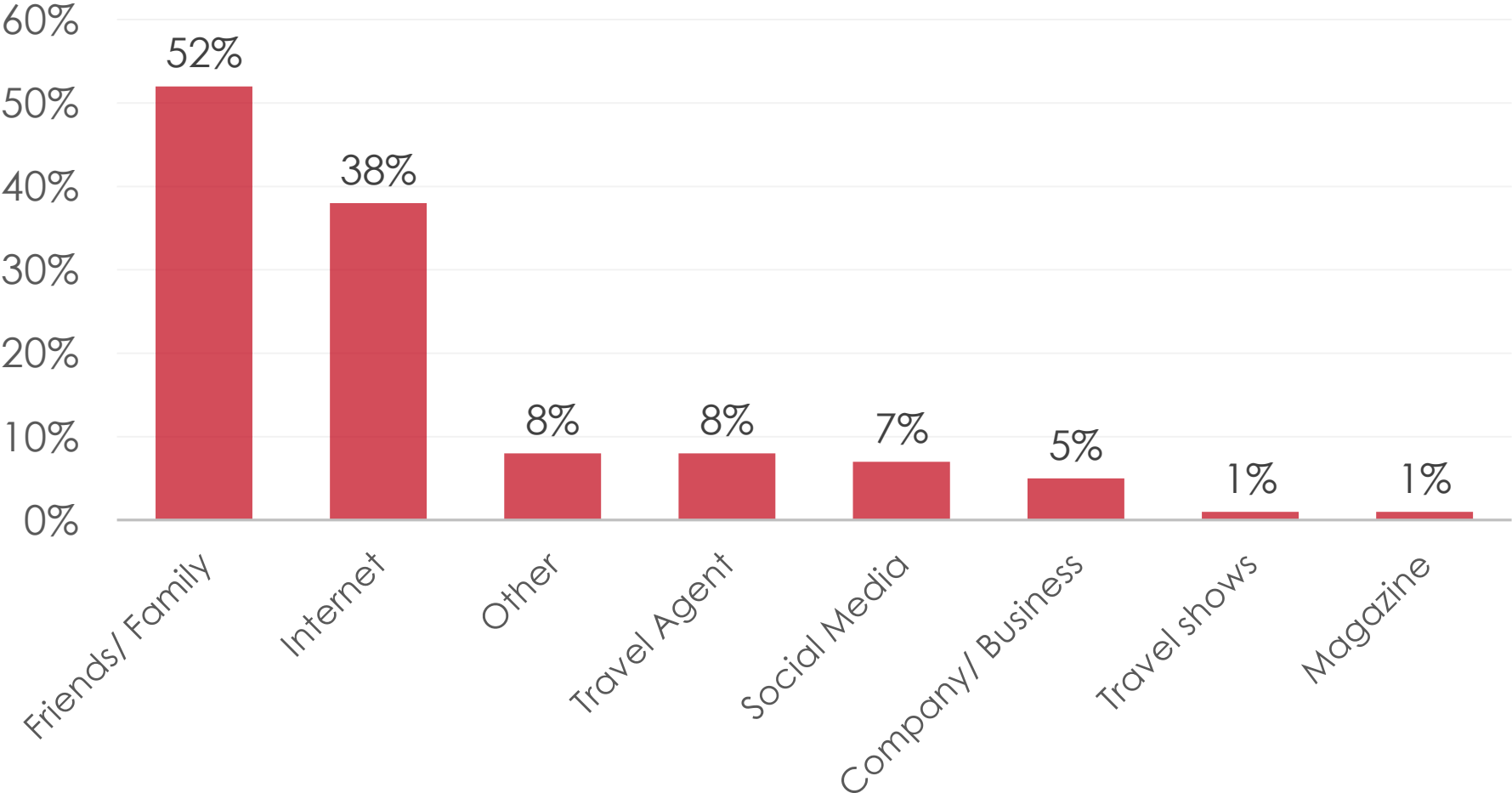
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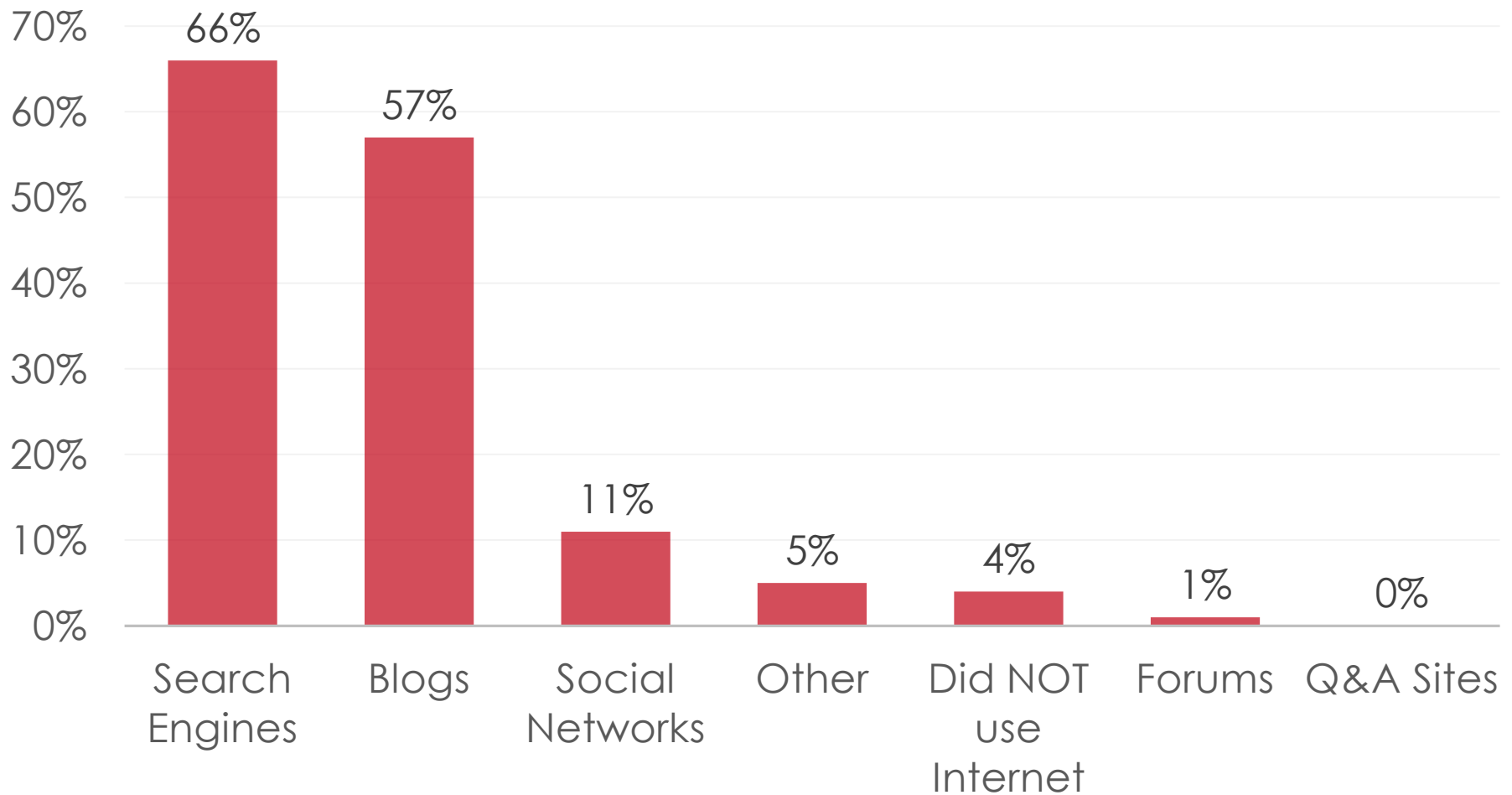
INTERNET- SOURCES OF INFORMATION
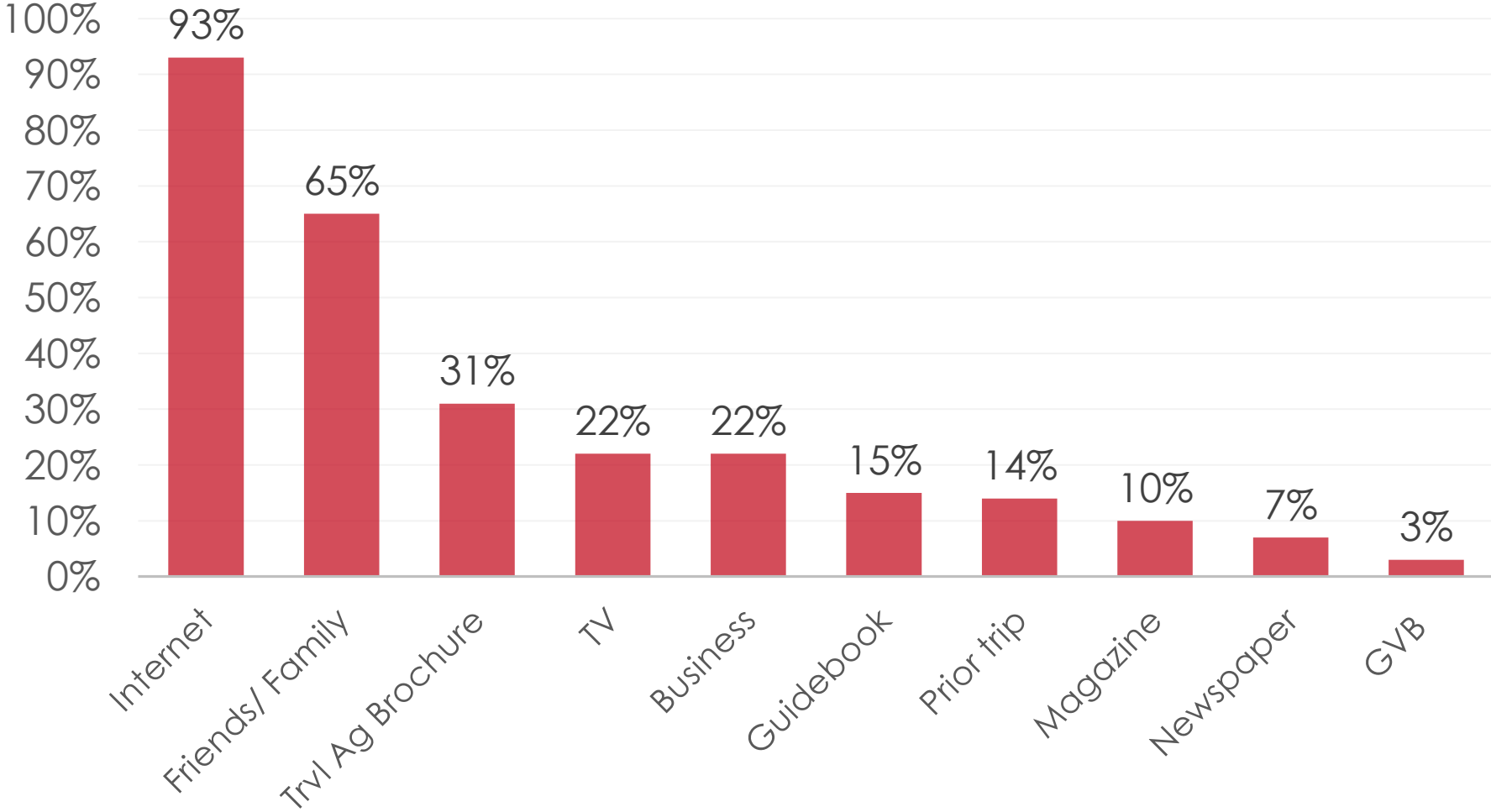## Things to do on Guam
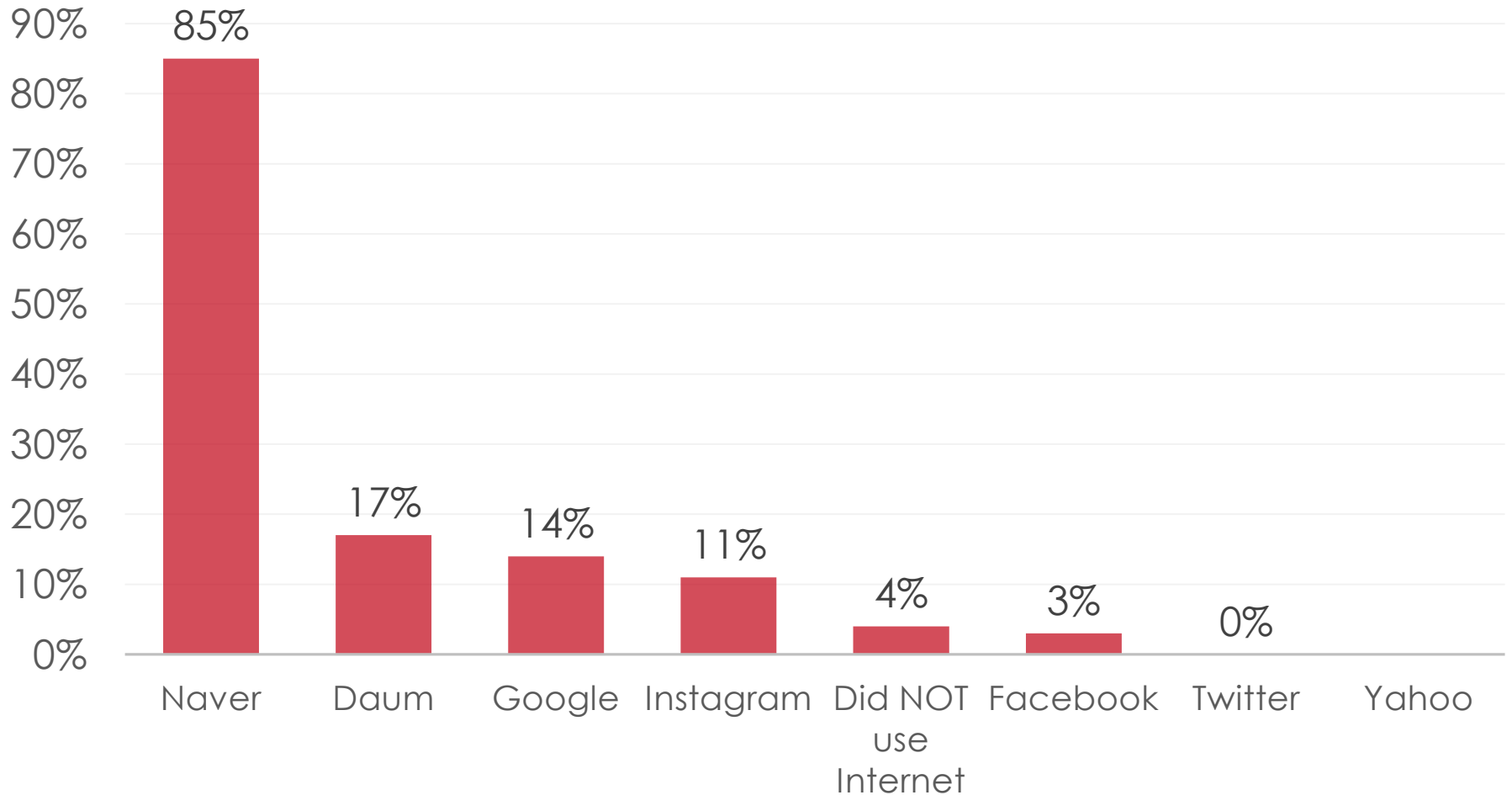
INTERNET- SOURCES OF INFORMATION GVB

[A]
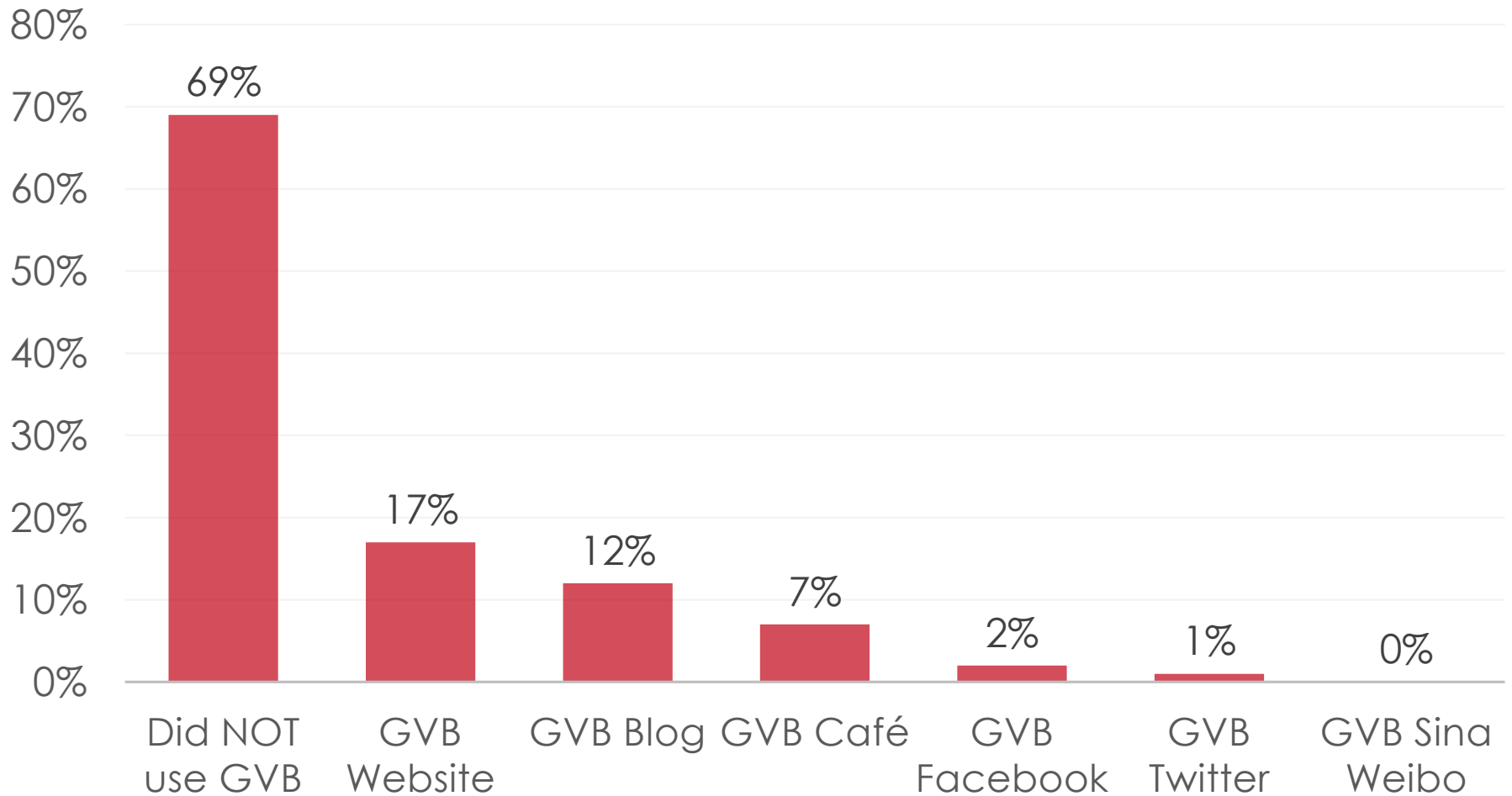
TRAVEL MOTIVATION

PRE-ARRIVAL SOURCES OF INFOMATION

Source	Percentage
Internet	93%
Friends/ Family	65%
Trvl Ag Brochure	31%
TV	22%
Business	22%
Guidebook	15%
Prior trip	14%
Magazine	10%
Newspaper	7%
GVB	3%

[A]

PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q1 Please select the top 3 sources of information you used to find out about Guam before you trip.

		TOTAL	FIT	MICE	HONEY-MOON	WEDDING	LEISURE TRAVELER	FAMILY	GROUP TOUR	REPEAT VISITOR
		-	-	-	-	-	-	-	-	-
Q1	Internet	93%	92%	100%	100%	100%	93%	93%	80%	87%
	Friend/ Relative	65%	72%	56%	71%	100%	65%	61%	20%	38%
	Travel Agent Brochure	31%	16%	44%	57%		31%	34%	40%	25%
	Co-Worker/ Company Trvl Dept	22%	20%	56%			23%	21%	40%	12%
	TV	22%	22%	11%	29%		22%	25%	40%	20%
	Travel Guidebook-Bookstore	15%	23%	11%			15%	15%	20%	10%
	Prior Trip	14%	14%	11%			13%	14%	40%	83%
	Magazine (Consumer)	10%	8%		29%		10%	11%		8%
	Newspaper	7%	5%		14%		7%	7%		
	GVB Office	3%	5%	11%			3%	3%		3%
	Other	2%	2%				1%	1%		2%
	Consumer Trvl Show	1%					1%	1%		
	Radio	1%					1%	1%		2%
	Travel Trade Show	0%					0%	0%		2%
	Theater Ad	0%	1%				0%	0%		
	Total	350	132	9	7	1	312	280	5	60

Prepared by QMark Research

[A]

ONISLE
SOURCES OF INFOMATION

[A]
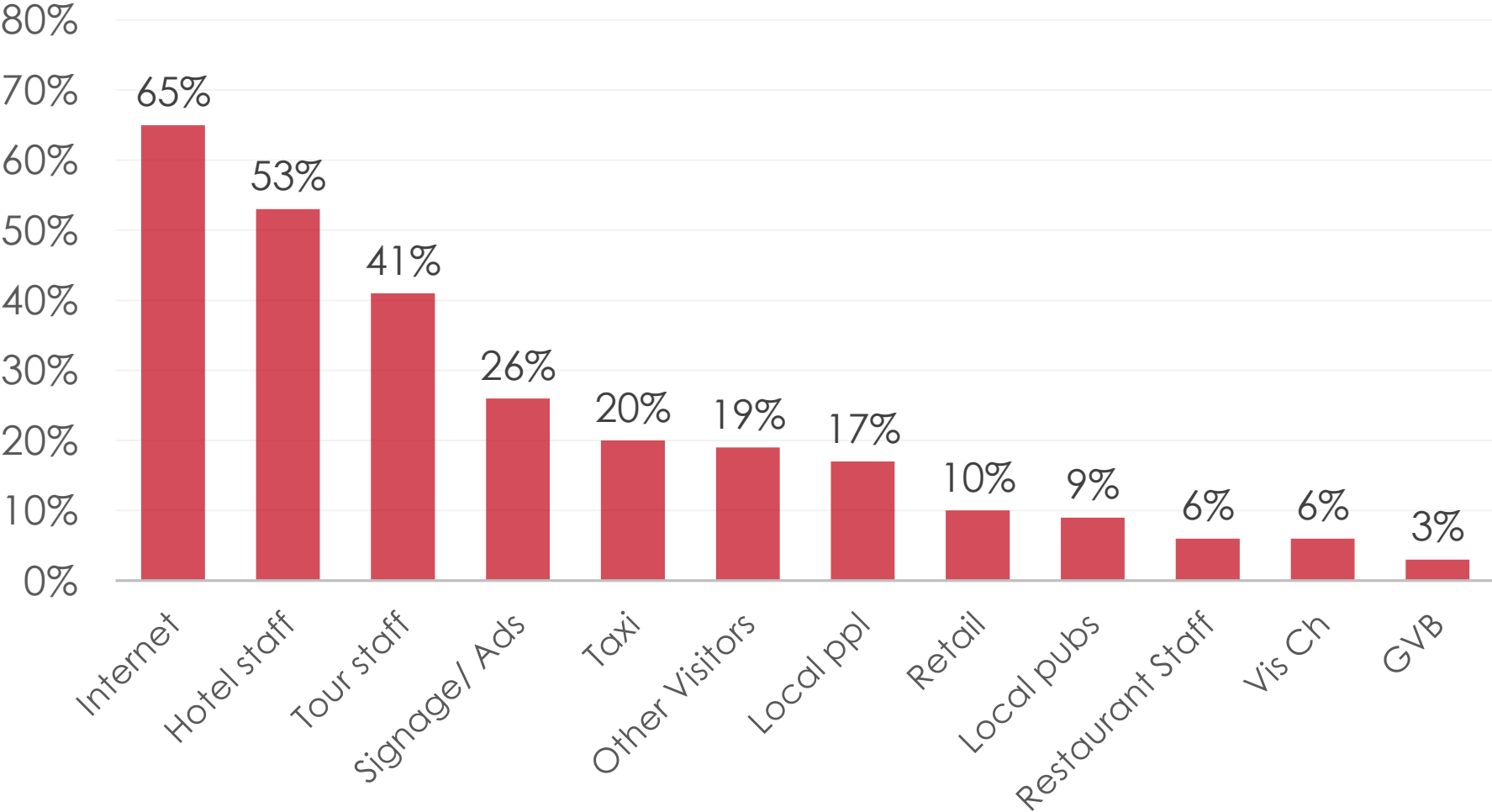
ON-ISLE
SOURCES OF INFORMATION –
Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

**Q2 Please select the top 3 sources of information you used to find out about Guam while you were here.**

		TOTAL	FIT	MICE	HONEY-MOON	WEDDING	LEISURE TRAVELER	FAMILY	GROUP TOUR	REPEAT VISITOR
		-	-	-	-	-	-	-	-	-
Q2	Internet	65%	71%	78%	86%	100%	67%	65%	80%	65%
	Hotel Staff	53%	55%	33%	29%	100%	54%	53%		58%
	Tour Staff	41%	28%	67%	71%		42%	42%	80%	40%
	Signs/ Advertisement	26%	19%	22%	14%		25%	24%	60%	18%
	Taxi Driver	20%	26%	11%	14%	100%	21%	20%		32%
	Other Visitors	19%	18%	33%	29%	100%	18%	18%	40%	20%
	Local Ppl	17%	17%	11%	14%		18%	15%	20%	20%
	Retail Staff	10%	12%	11%			10%	11%	20%	7%
	Local Publication	9%	9%				9%	10%		10%
	Visitor Channel	6%	5%				6%	6%		7%
	Restaurant Staff	6%	8%				6%	6%		3%
	Other	3%	3%	11%	29%		4%	4%	20%	3%
	GVB	3%	5%		14%		3%	4%		2%
	Total	347	130	9	7	1	310	277	5	60

Prepared by QMark Research

[A]

SECTION 6
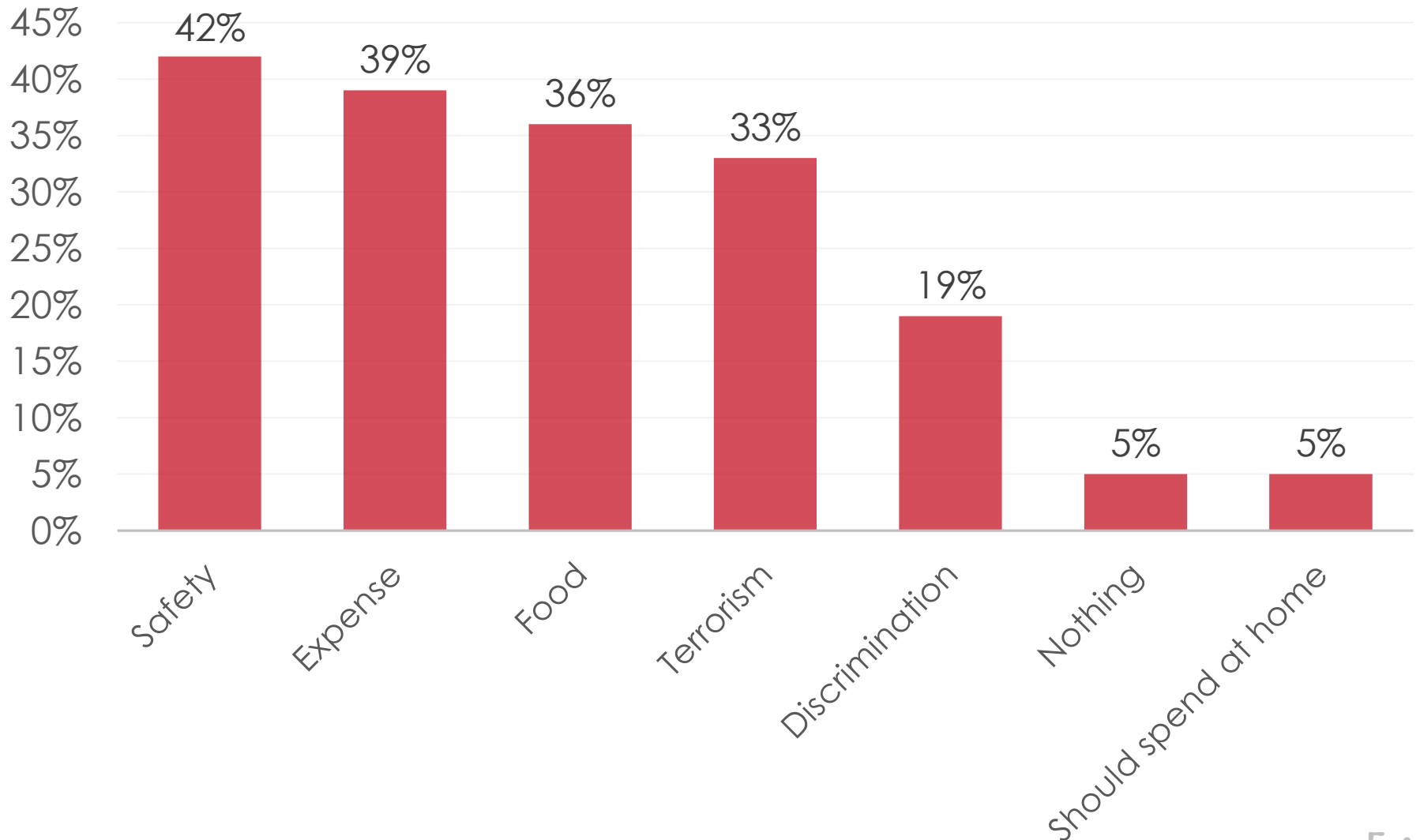# FUTURE TRAVEL TO GUAM

[A]

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

Yes
40%

No
60%

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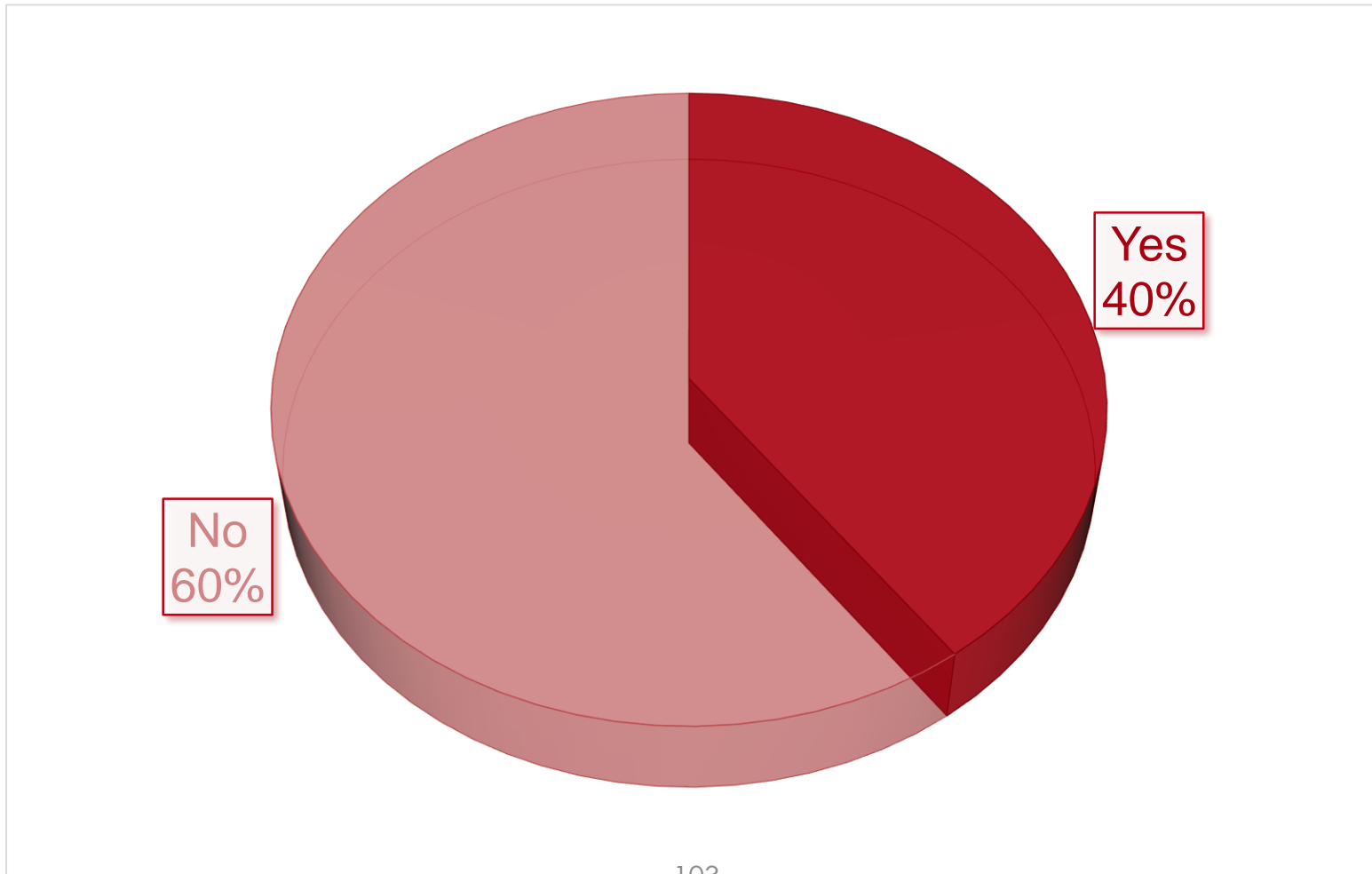
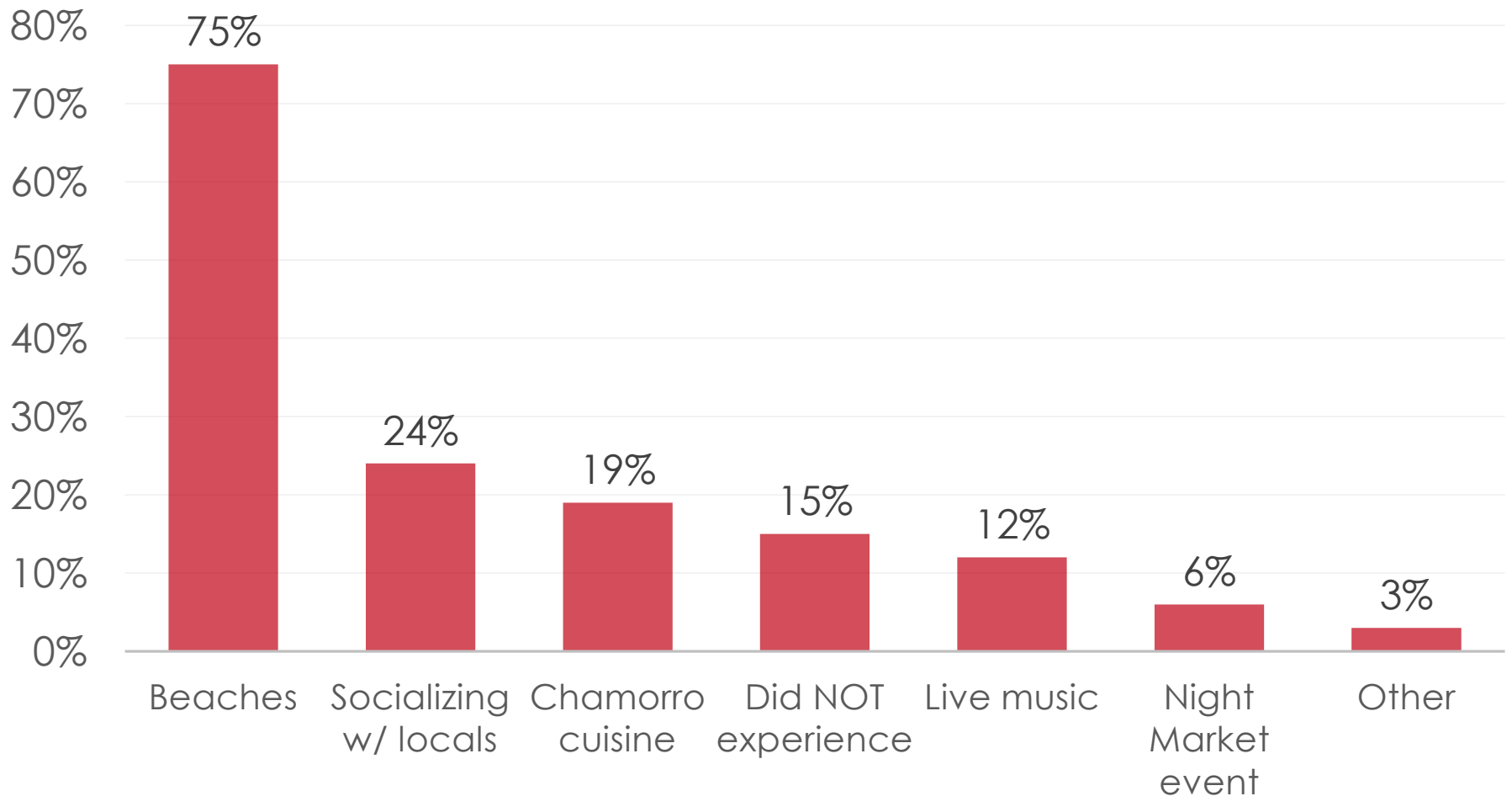# What would it take to make you stay an extra day on Guam?
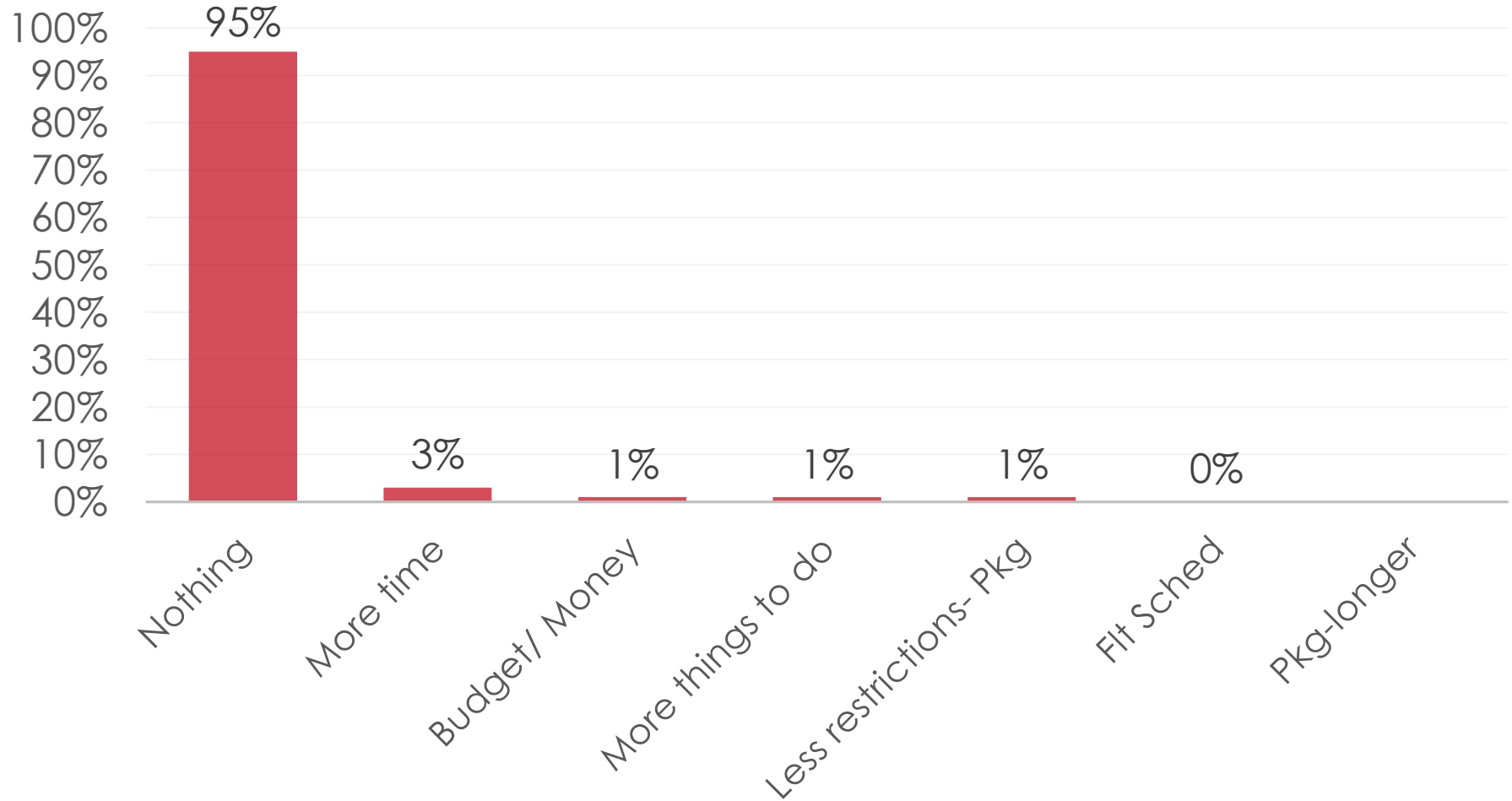
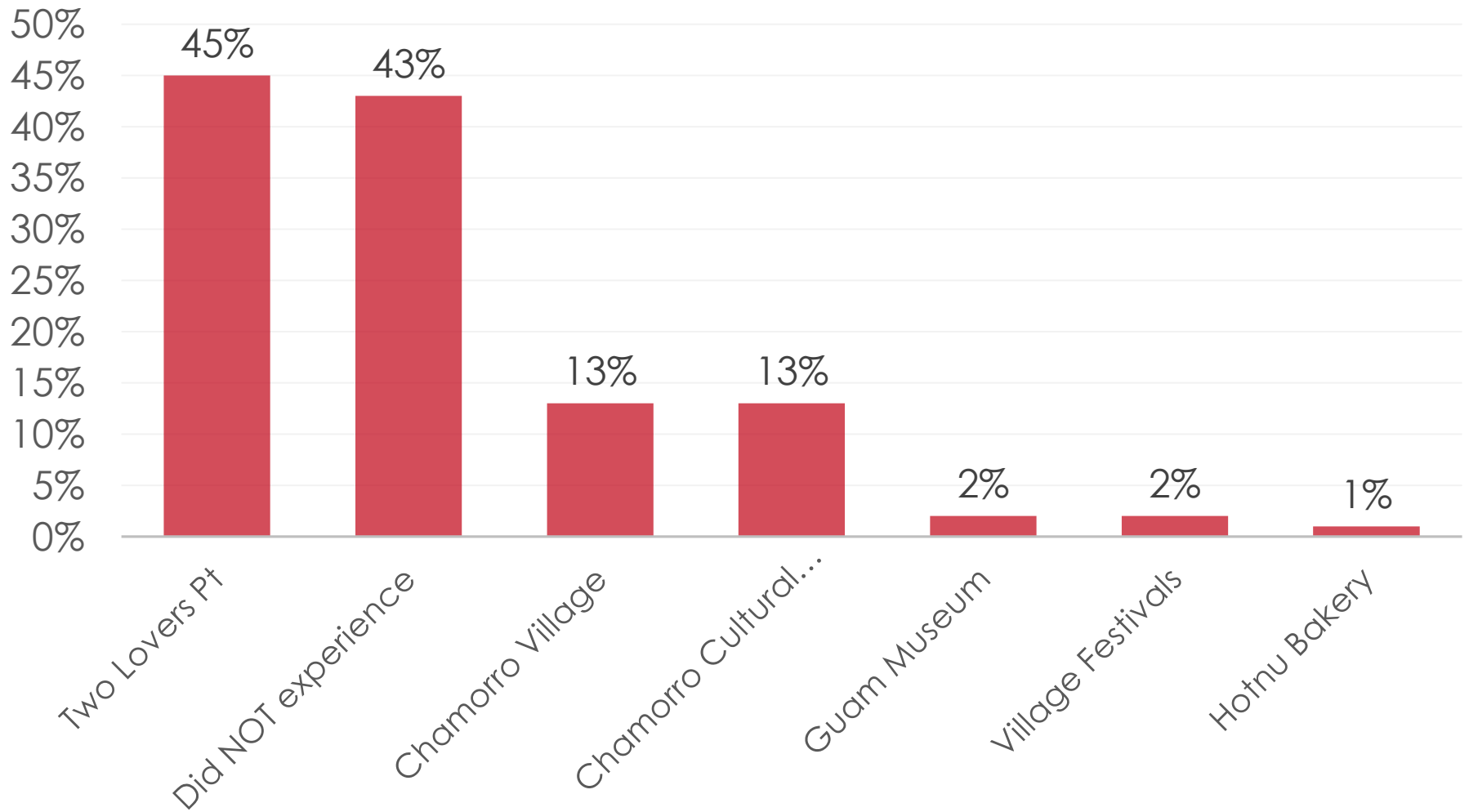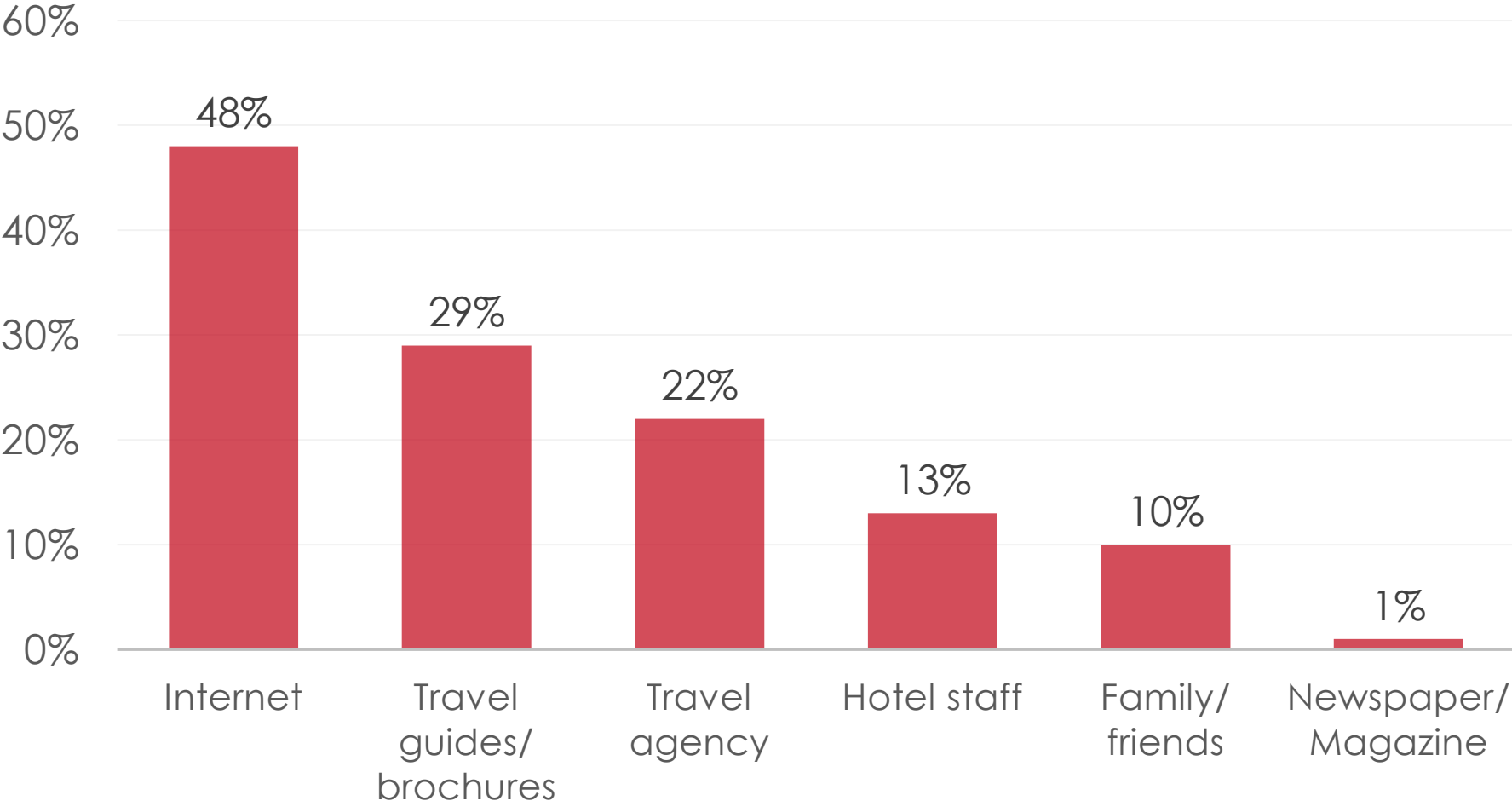# FUTURE TRAVEL CONCERNS

[A]

SECTION 7
GUAM CULTURE
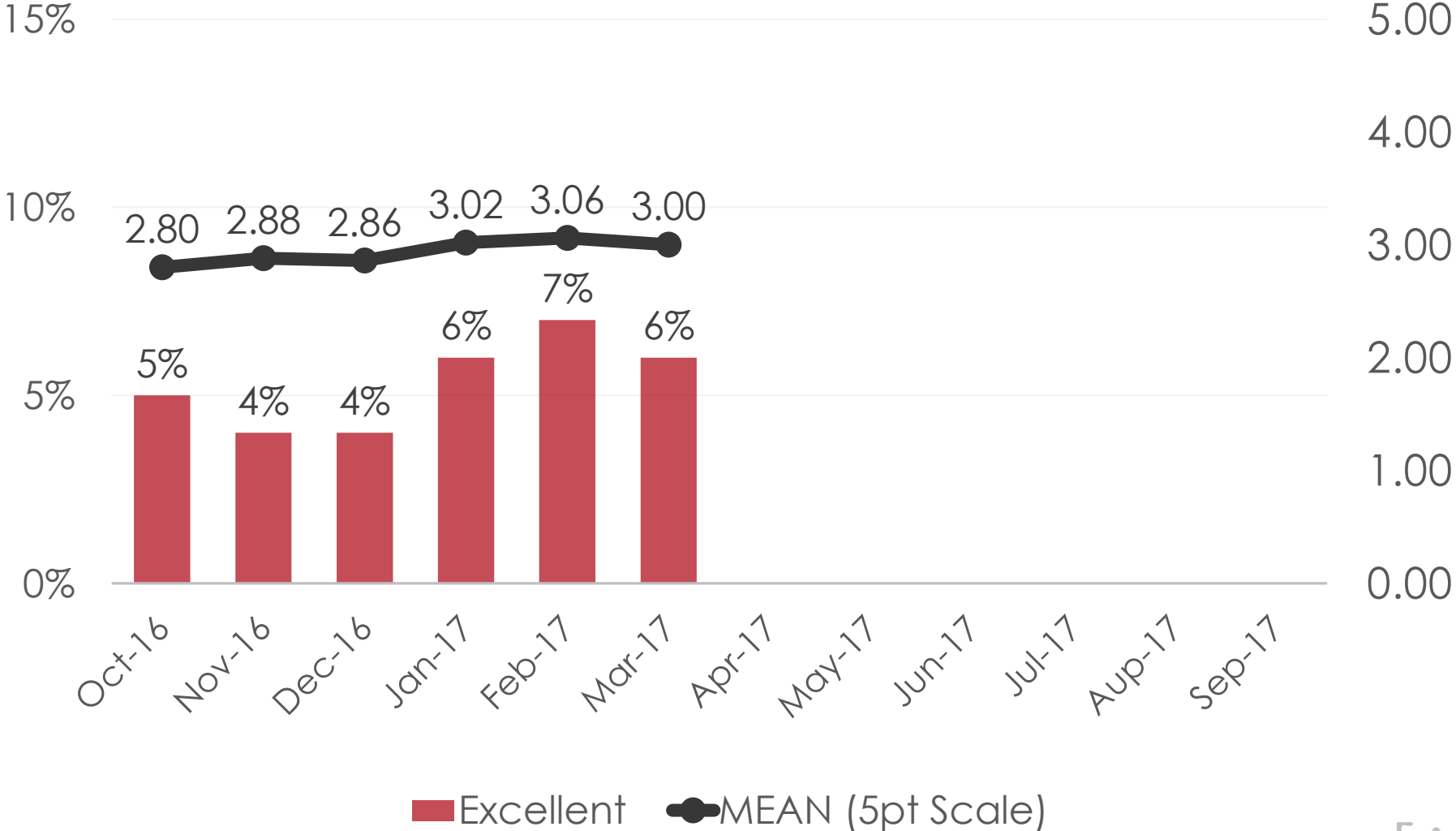
EXPERIENCED- CHAMORRO/ HAFA ADAI SPIRIT

EXPERIENCED-
OTHER CULTURAL ACTIVITY/EVENTS

[A]

SOURCES OF INFORMATION-
CULTURAL ACTIVITY/EVENTS

[A]

SATISFACTION-CULTURAL ACTIVITY/EVENTS

Excellent | MEAN (5pt Scale)

[A]

OBSTACLES-
CULTURAL ACTIVITY/EVENTS

[A]
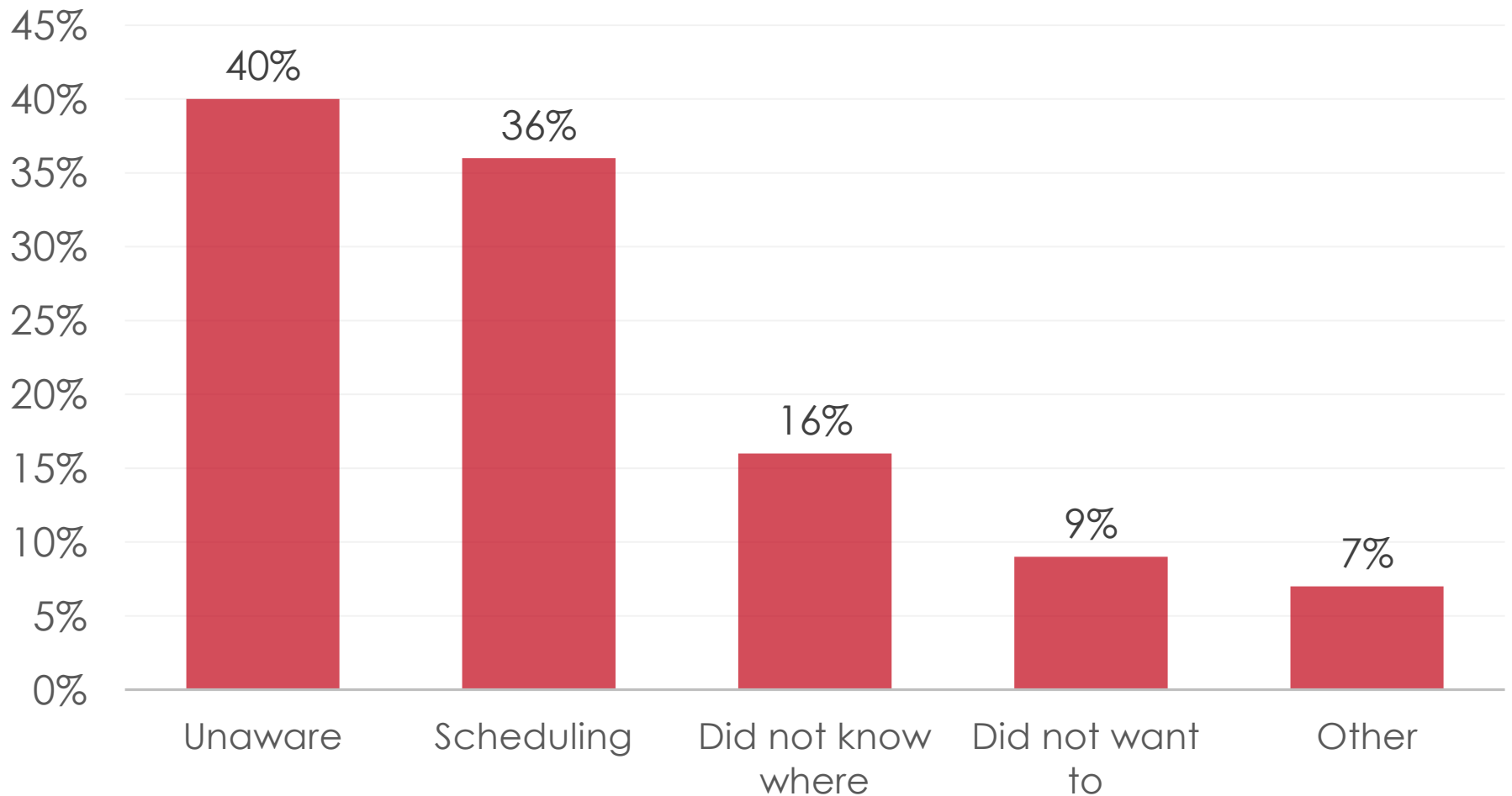
SECTION 7
ADVANCED STATISTICS

[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 2017, and Overall Oct 2016 - Mar 2017							
Drivers:	Oct-16 rank	Nov-16 rank	Dec-16 rank	Jan-17 rank	Feb-17 rank	**Mar-17 rank**	Combined Oct 2016 - Mar 2017 rank
Quality & Cleanliness of beaches & parks	3	3		3	6		3
Ease of getting around			4				7
Safety walking around at night	7						
Quality of daytime tours			3		2		5
Variety of daytime tours						**3**	
Quality of nighttime tours							
Variety of nighttime tours							
Quality of shopping			6	2			9
Variety of shopping	6					**7**	
Price of things on Guam						**6**	
Quality of hotel accommodations	4	4			4		4
Quality/cleanliness of air, sky						**4**	8
Quality/cleanliness of parks	1				5		
Quality of landscape in Tumon		2	1	1	1	**1**	1
Quality of landscape in Guam			5	4		**5**	6
Quality of ground handler	5		2				10
Quality/cleanliness of transportation vehicles	2	1			3	**2**	2
% of Per Person On Island Expenditures Accounted For	64.0%	61.8%	44.1%	40.8%	57.5%	**56.1%**	54.3%
NOTE: Only significant drivers are included.							

[A]

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by seven significant factors in the March 2017 Period. By rank order they are:

  - **Quality of landscape in Tumon,**
  - **Quality & cleanliness of transportation vehicles,**
  - **Variety of day time tours,**
  - **Quality/cleanliness of air, sky,**
  - **Quality of landscape in Guam,**
  - **Price of things on Guam, and**
  - **Variety of shopping.**

- With all seven factors the overall r^2 is .561 meaning that **56.1% of overall satisfaction is accounted for by these factors.**

[A]

Drivers – On-Isle Expenditures

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	**Mar-17**	Combined Oct 2016-Mar 2017
Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2016, Jan, Feb, Mar 2017 and Overall Oct 2016-Mar 2017							
Drivers:	rank	rank	rank	rank	rank	**rank**	rank
Quality & Cleanliness of beaches & parks	1						
Ease of getting around		2					
Safety walking around at night							
Quality of daytime tours							
Variety of daytime tours							
Quality of nighttime tours							
Variety of nighttime tours							
Quality of shopping		3					3
Variety of shopping							
Price of things on Guam		1					2
Quality of hotel accommodations					1		
Quality/cleanliness of air, sky						**1**	
Quality/cleanliness of parks							
Quality of landscape in Tumon							
Quality of landscape in Guam							
Quality of ground handler	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%**	1.2%
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 one significant factor in the March 2017 period. It is:
  - **Quality/cleanliness of air, sky.**
- With this factor the overall r^2 is .015 meaning that **1.5% of per person on island expenditure is accounted for by this factor.**

[A]