

Guam Visitors Bureau

Philippine Visitor Tracker Exit Profile

FY2017 DATA AGGREGATION

Prepared by: Anthology Research

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Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Filipino speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **422** departing Philippine 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 **422** is +/- 4.77 percentage points with a 95% confidence level. That is, if all Philippine 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 +/- 4.77 percentage points.

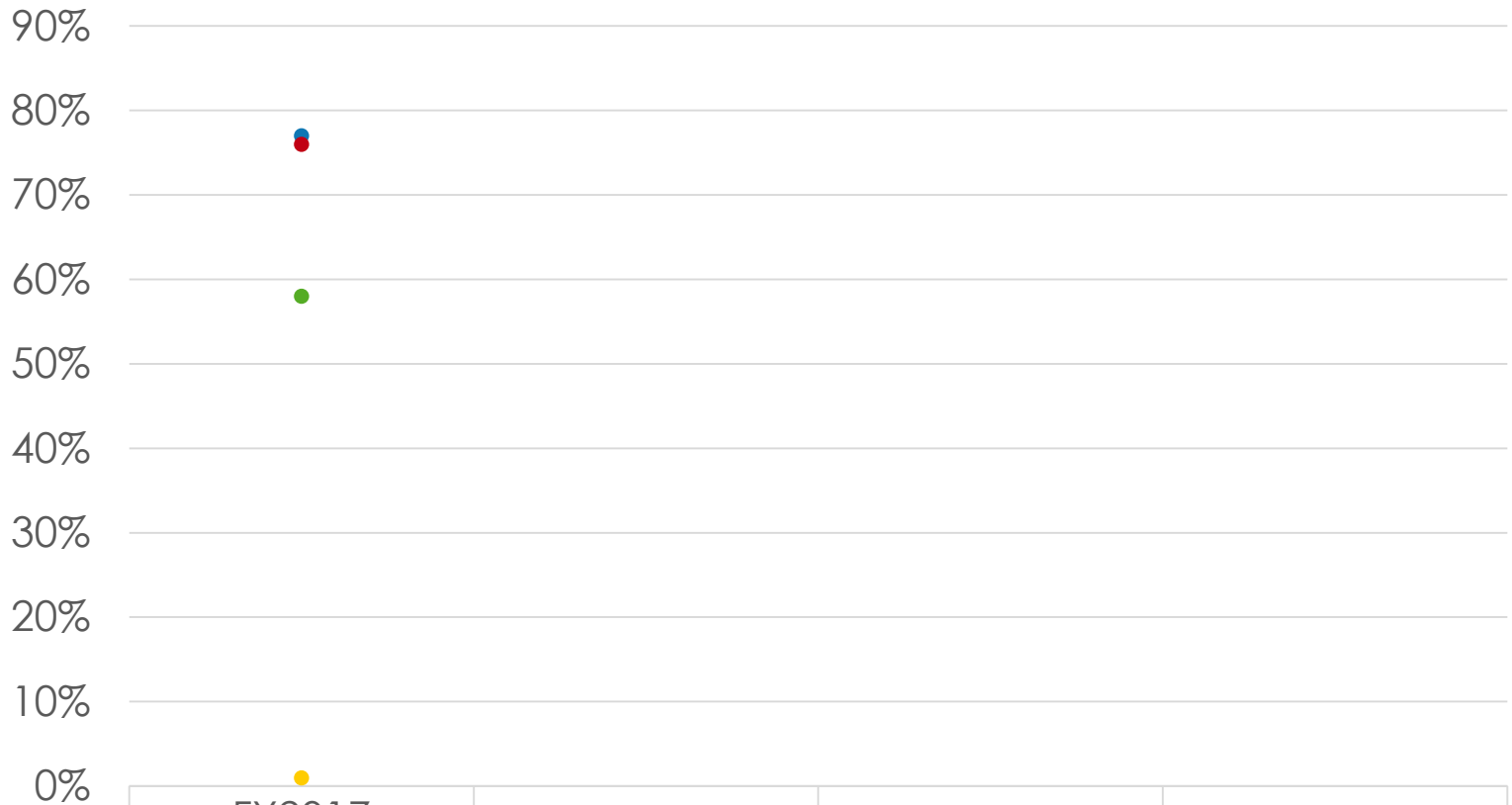
Objectives

- To monitor the effectiveness of the Philippine seasonal campaigns in attracting Filipino visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Philippine marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

Key Highlighted Segments

- **The specific objectives were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - FITs (Q7)
 - Leisure traveler (Q5A Here to relax/ Here to see beaches, tropical climate, here for pleasure)
 - Family (Q6)
 - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)
 - To identify the most significant factors affecting overall visitor satisfaction.
 - To identify (for all Filipino visitors) the most important determinants of on-island spending

Key Highlighted Segments

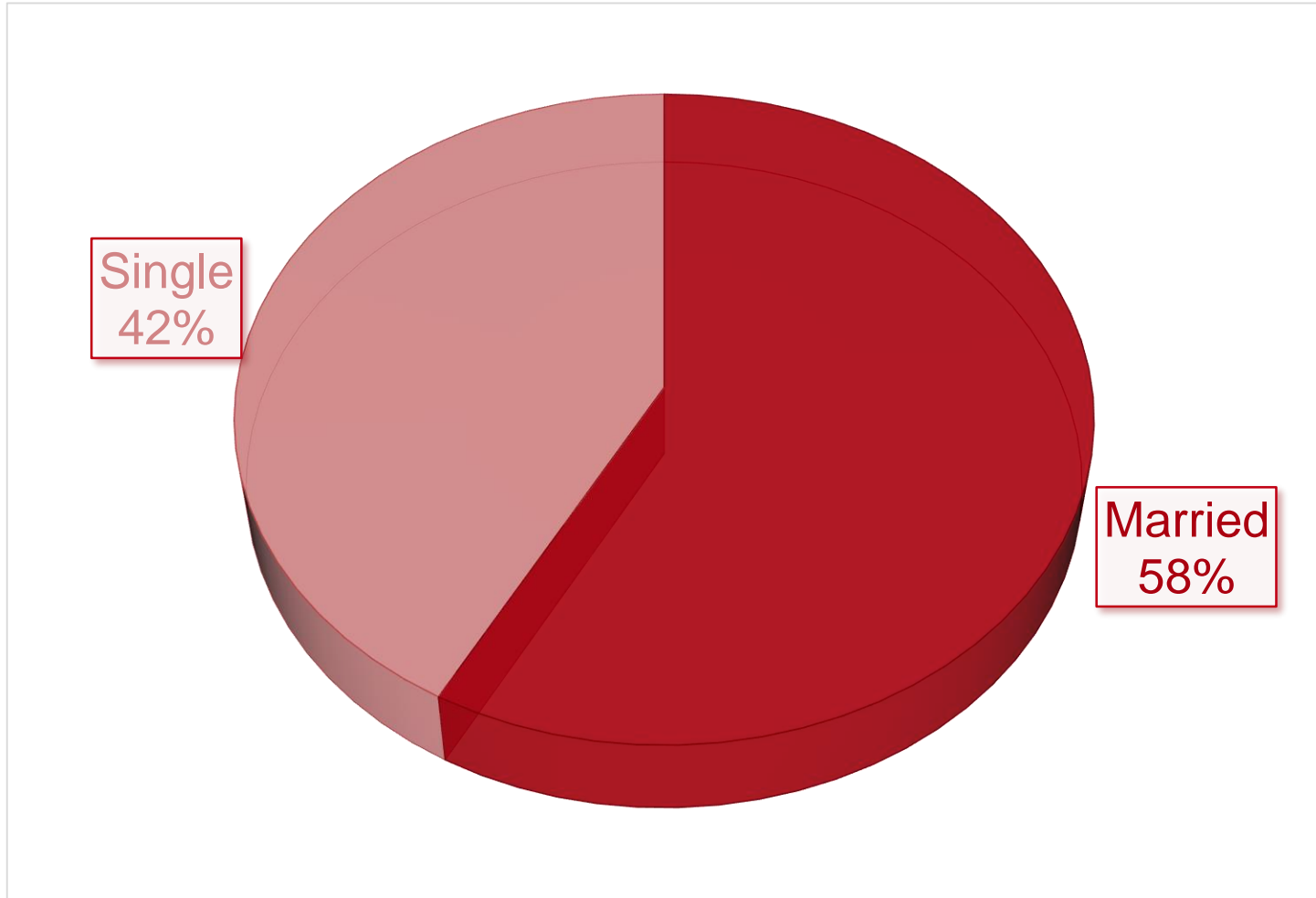


	FY2017			
—●— FITs	77%			
—●— Leisure Trvl	76%			
—●— Family	58%			
—●— MICE	1%			

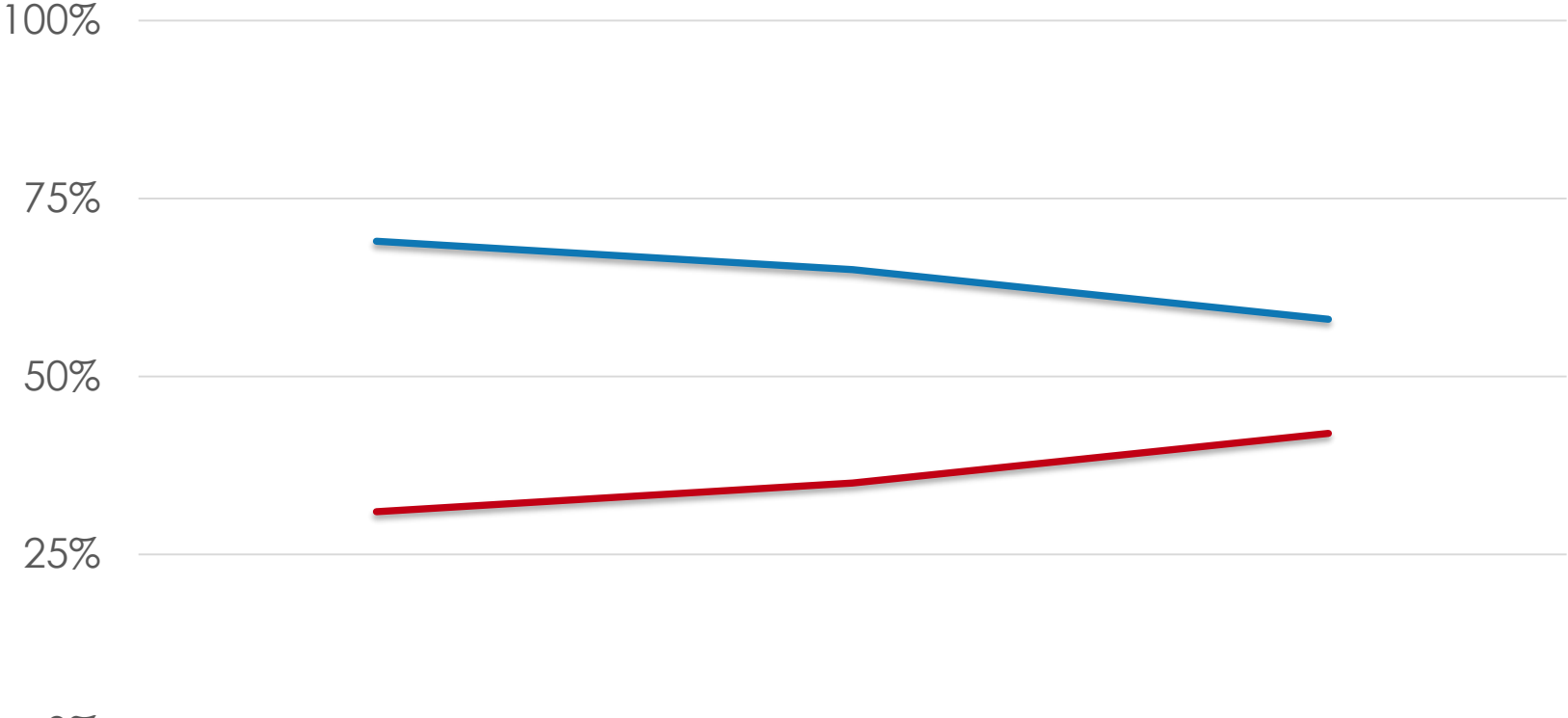
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



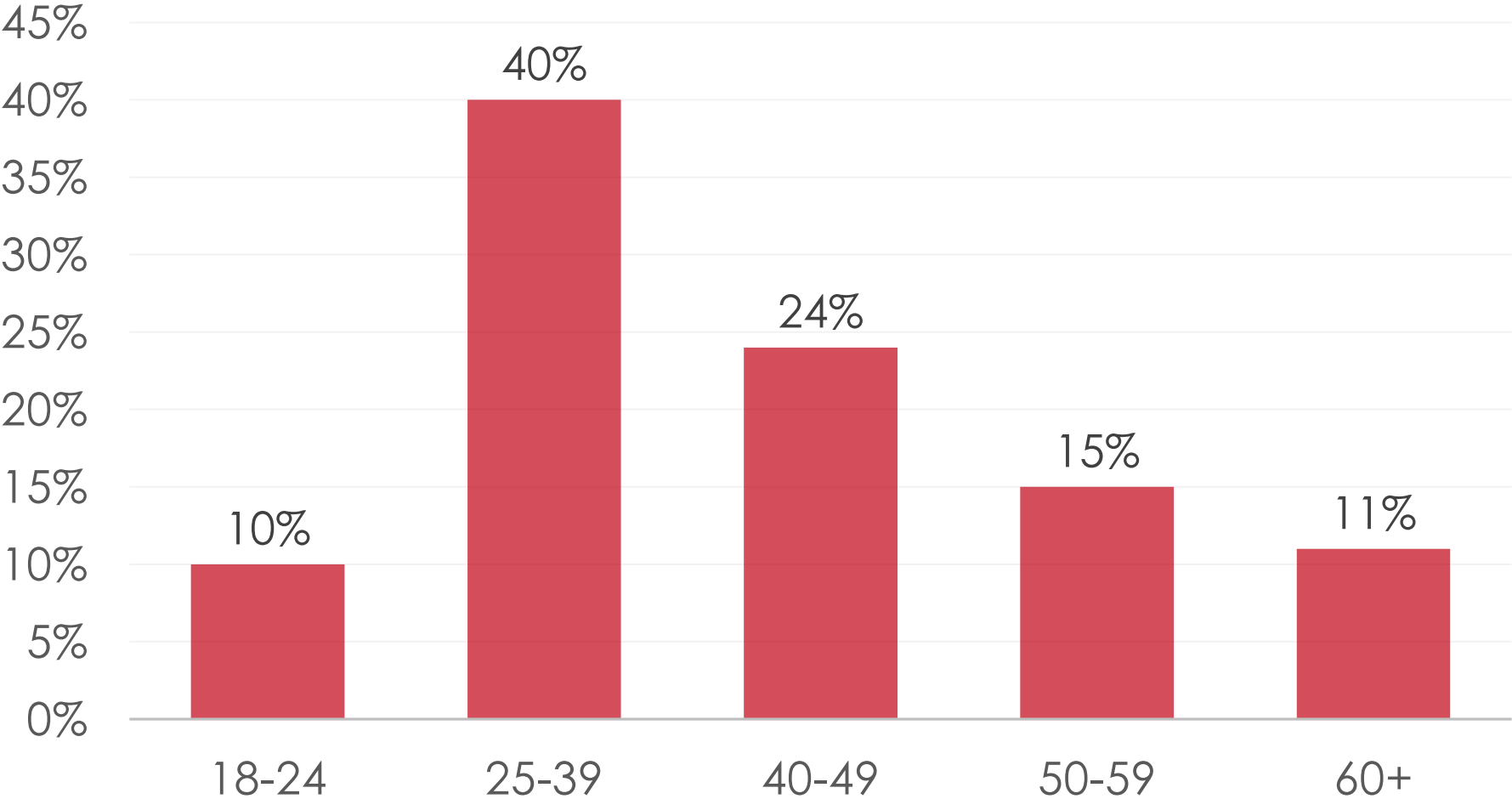
Marital status – Tracking



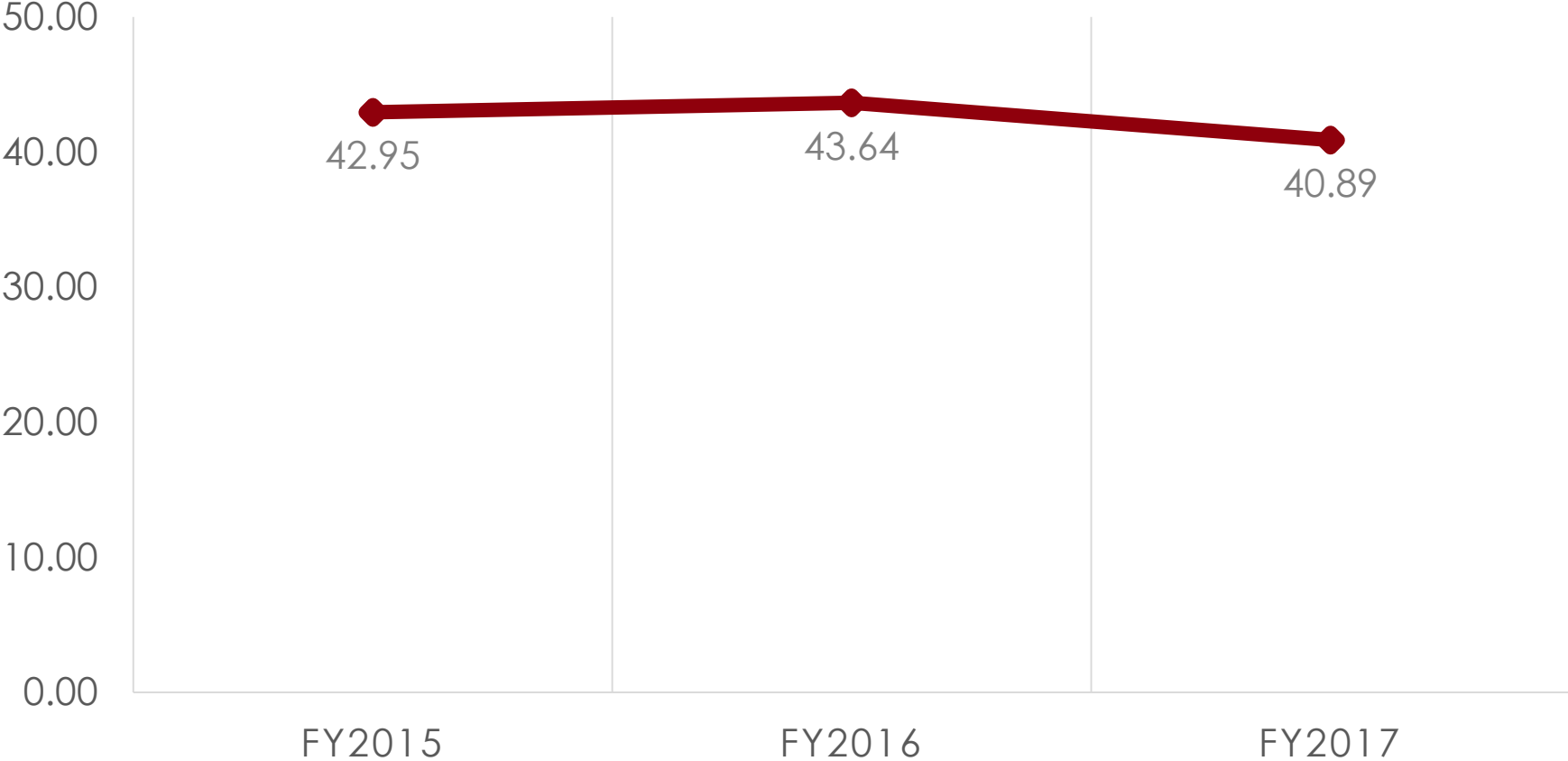
	FY2015	FY2016	FY2017
— Married	69%	65%	58%
— Single	31%	35%	42%

Age

MEAN = 40.89
MEDIAN = 39



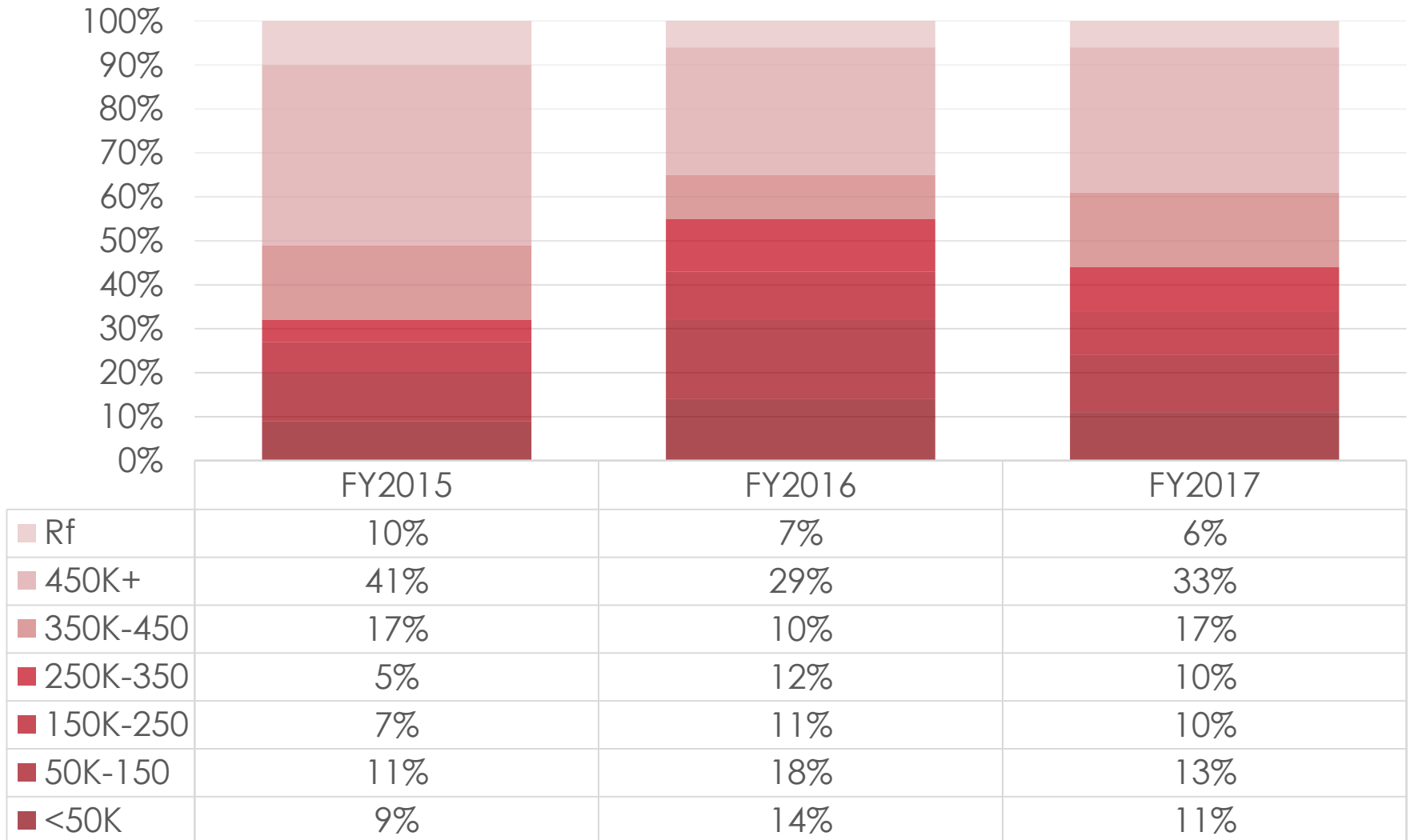
Age – Tracking



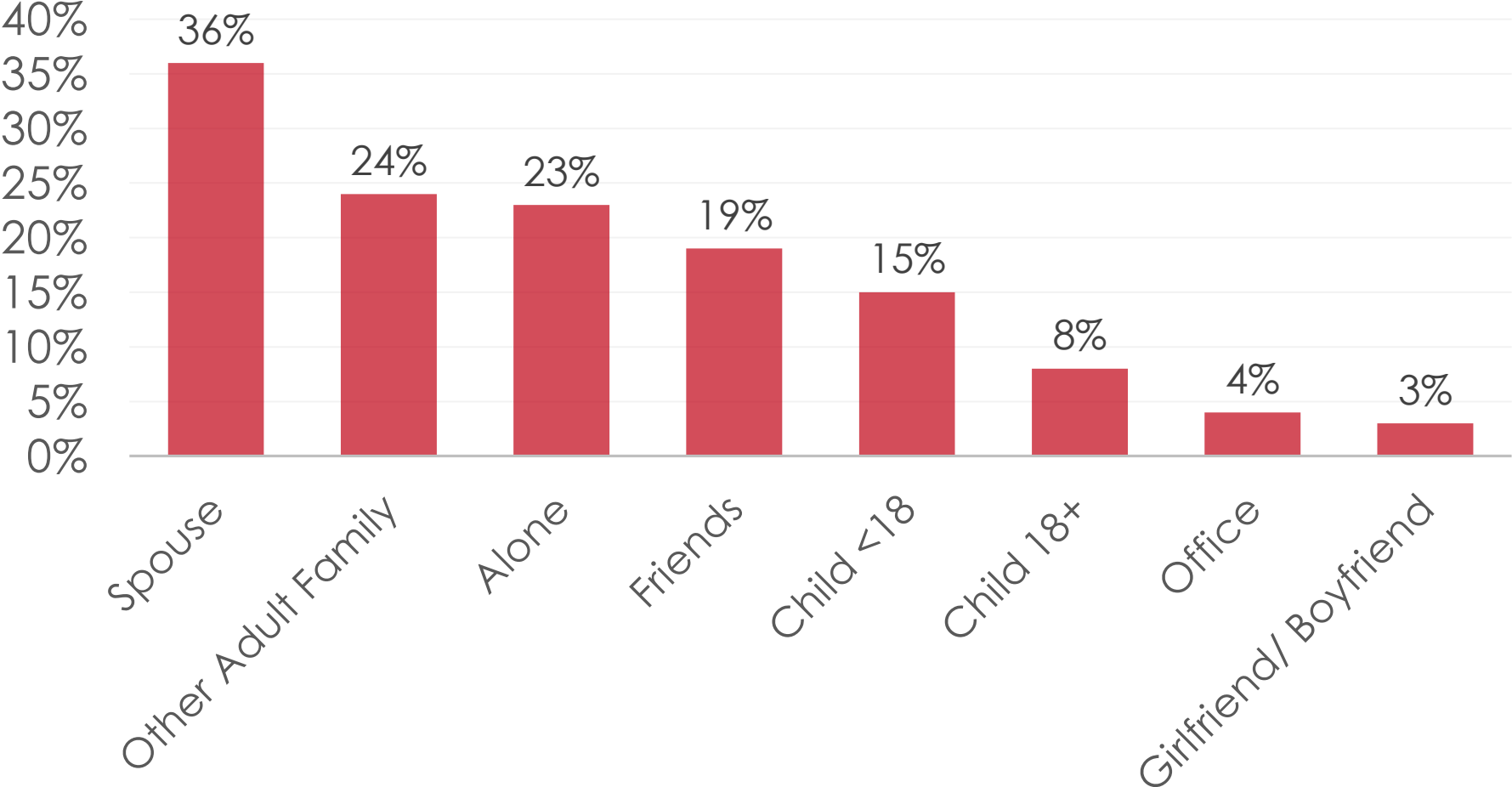
Annual Household Income



Annual Household Income - Tracking



Travel Party



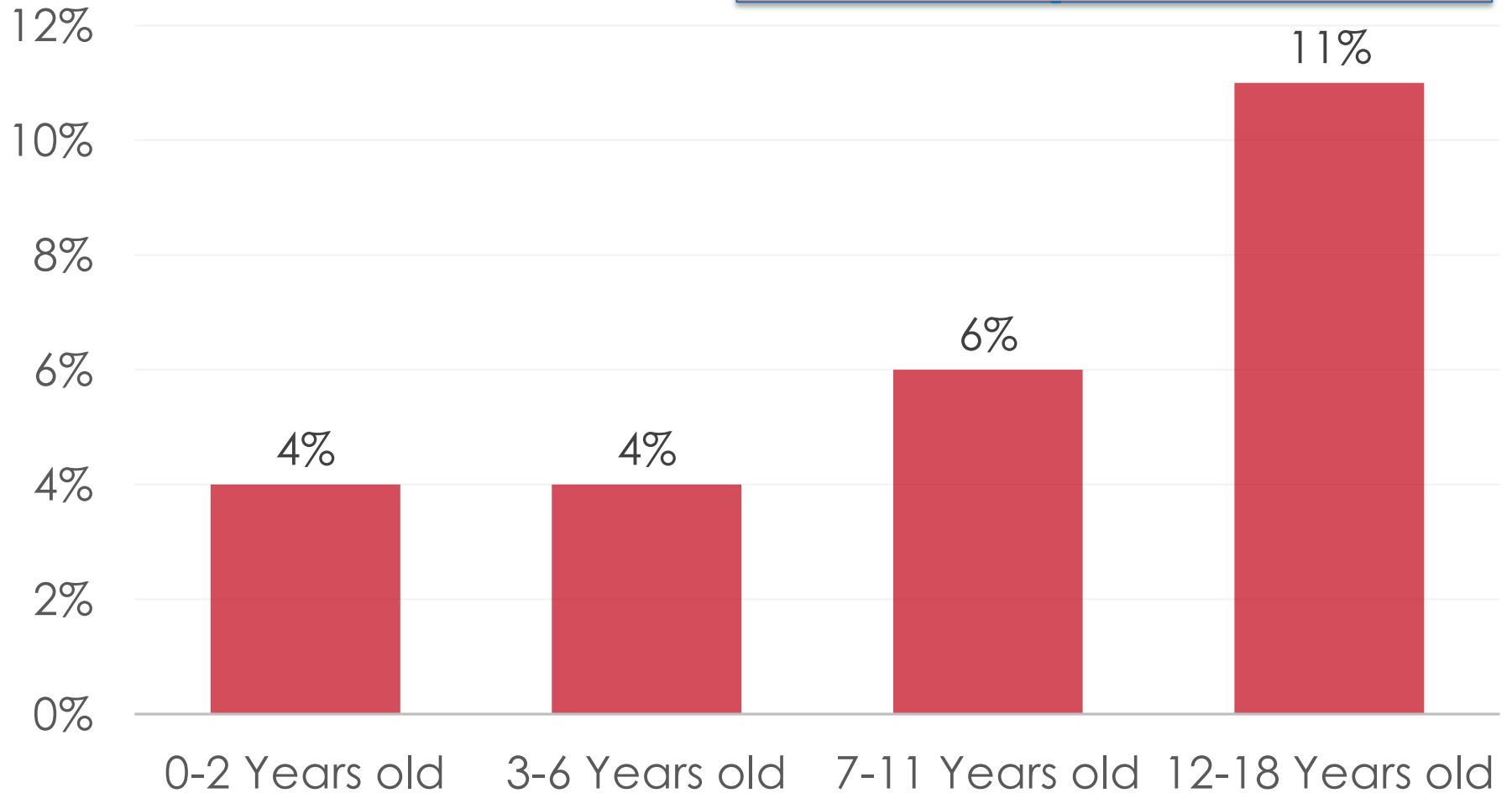
Travel Party



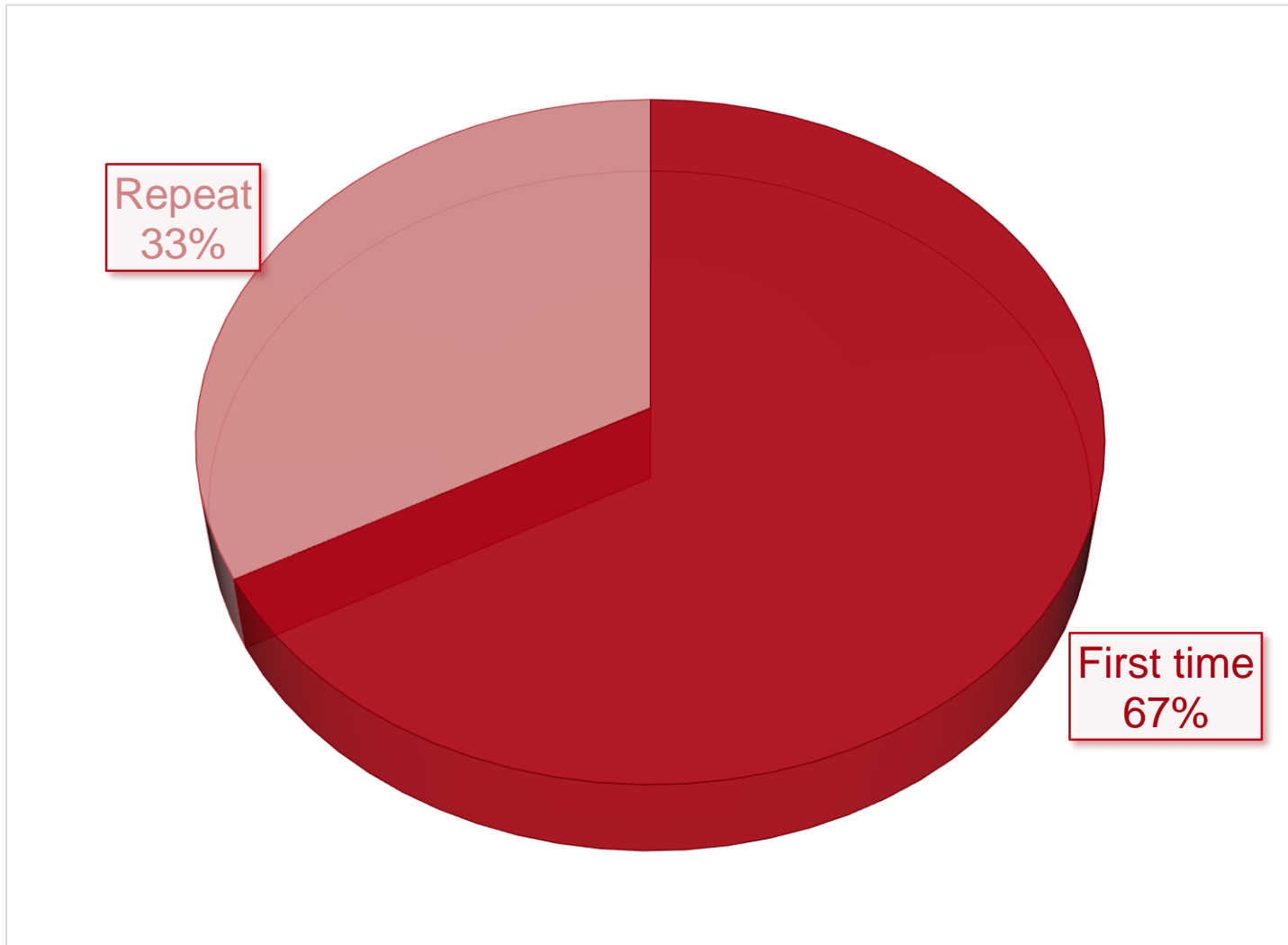
	FY2017			
Spouse	36%			
Child <18	15%			
Friend/ Assoc	19%			
Other Adult Family	24%			
Alone	23%			
Girlfriend/ Boyfriend	3%			
Child- Adult	8%			
Office	4%			

Travel Party - Children

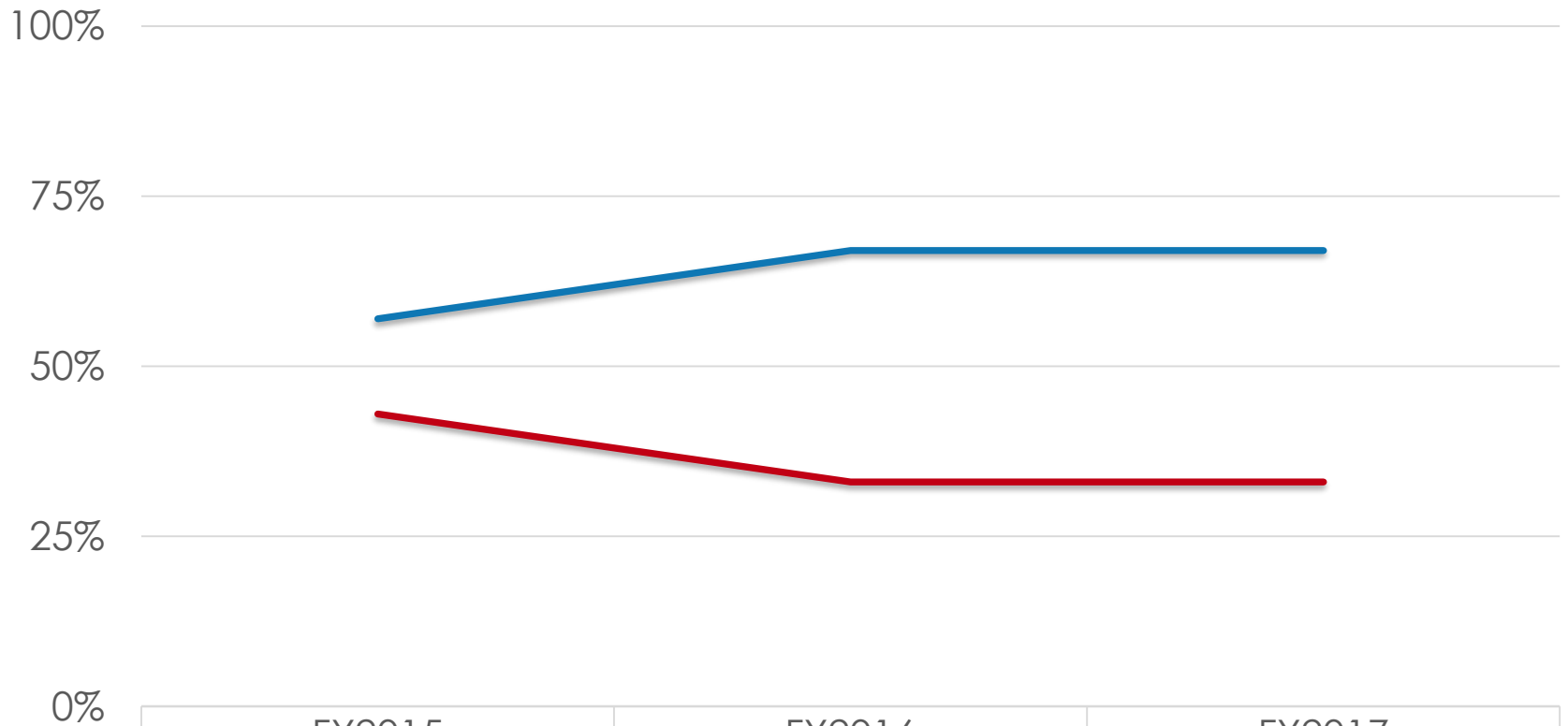
15% TRAVELING WITH A CHILD



Trips to Guam



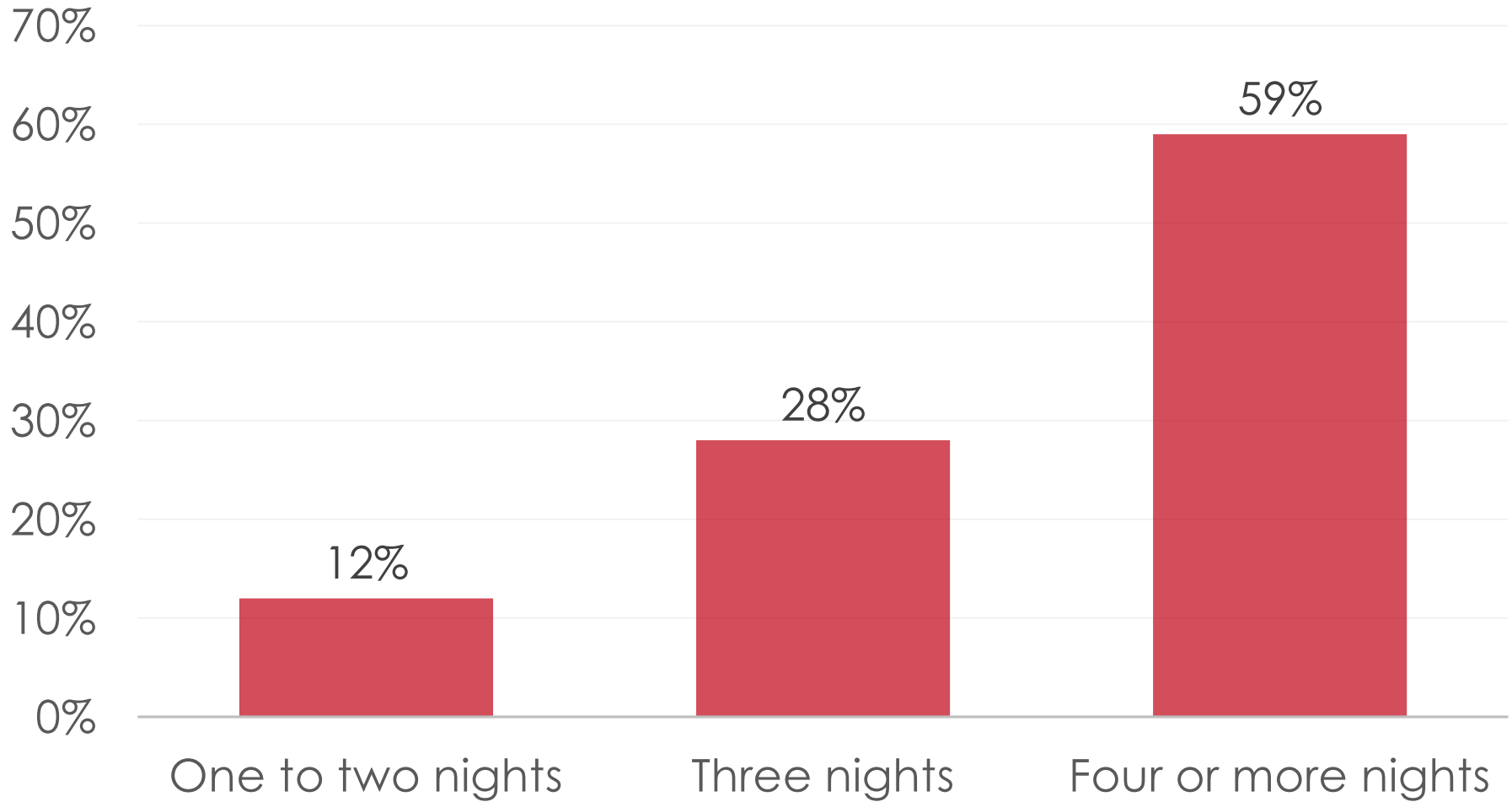
Trips to Guam – Tracking



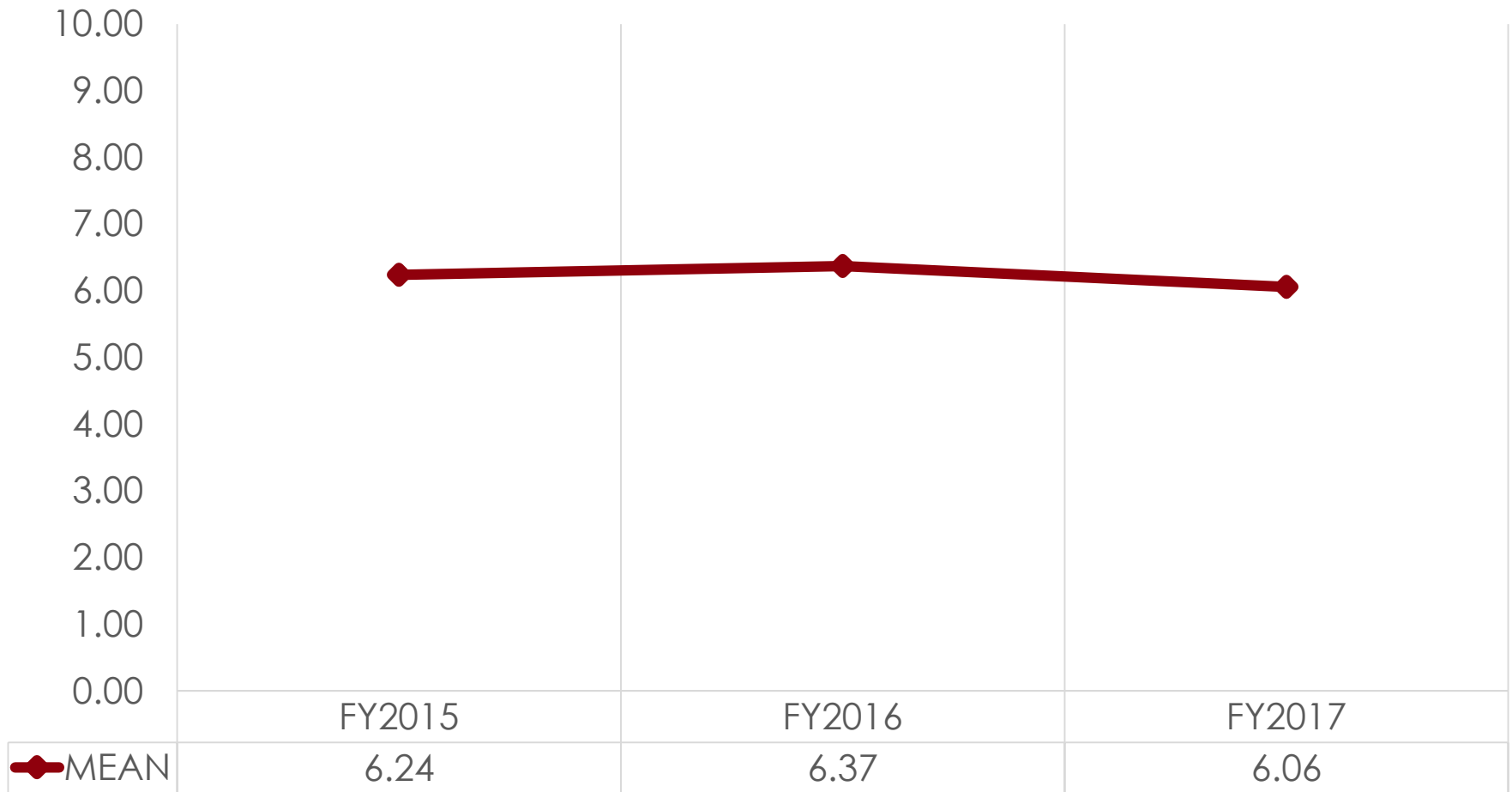
	FY2015	FY2016	FY2017
Repeat	57%	67%	67%
1st Time	43%	33%	33%

Length of Stay

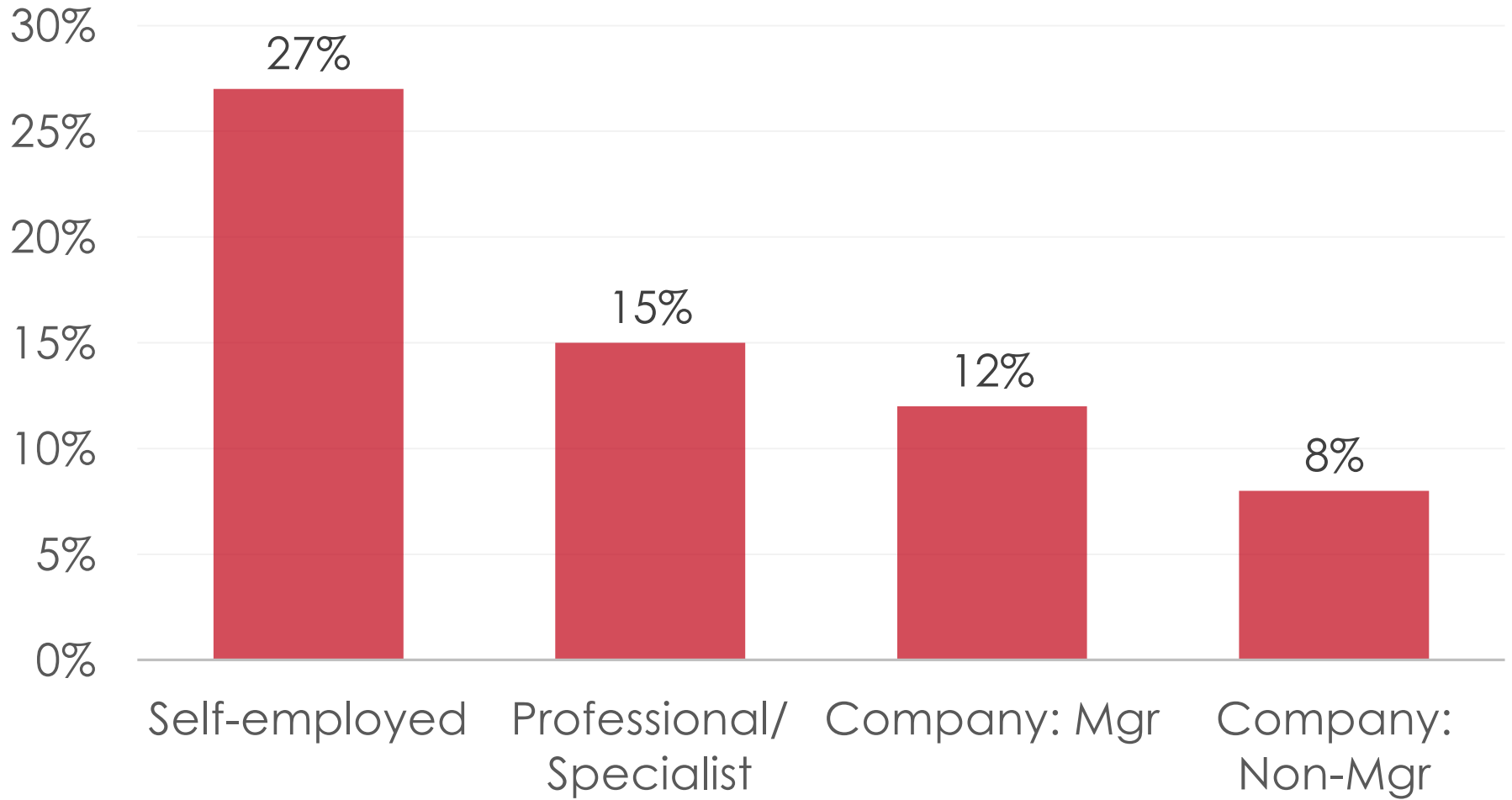
MEAN NUMBER OF NIGHTS = 6.06
MEDIAN NUMBER OF NIGHTS = 4



Length of Stay – Tracking



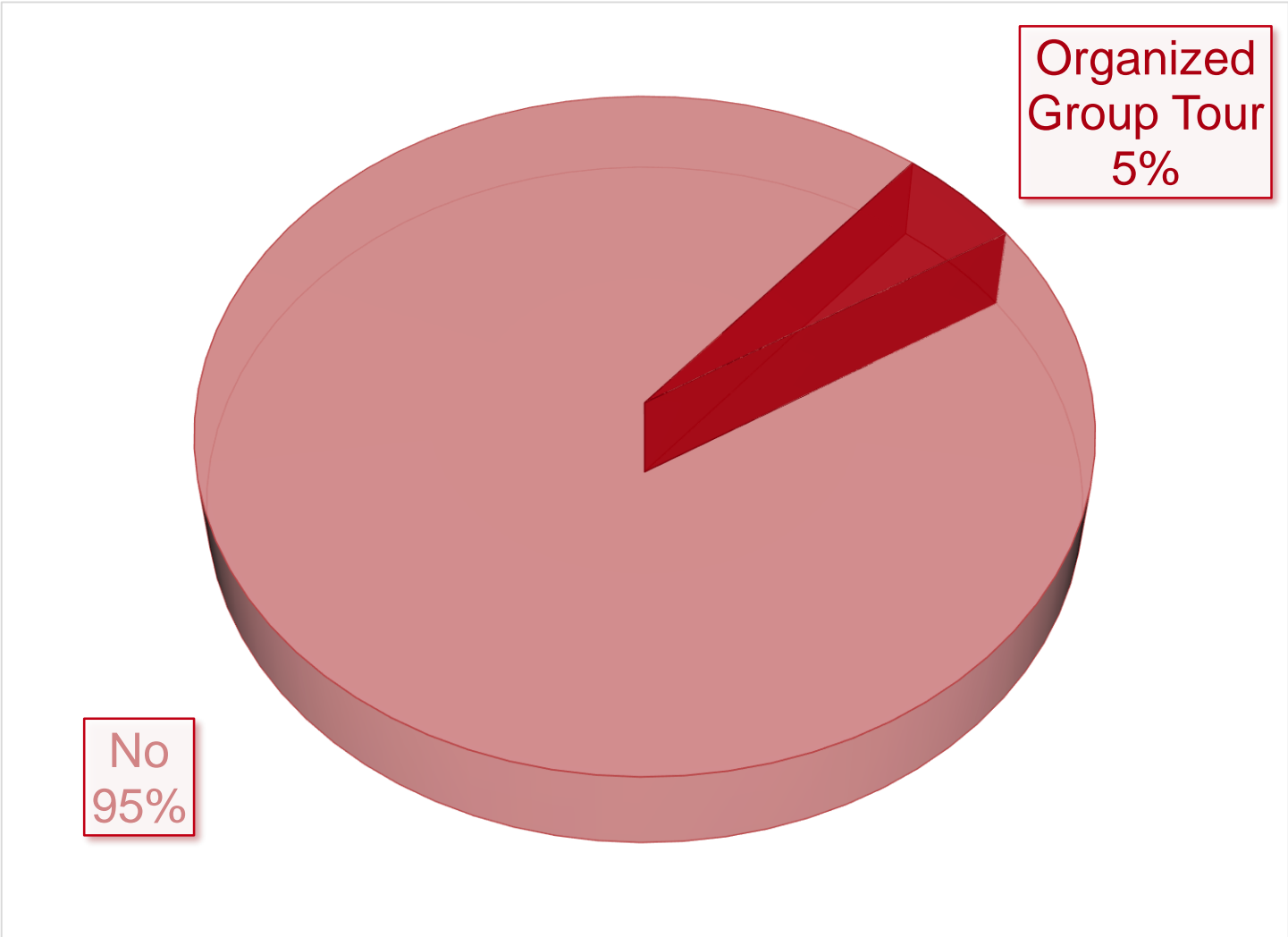
Occupation – Top Responses (10%+)



SECTION 2

TRAVEL PLANNING

Organized Group Tour



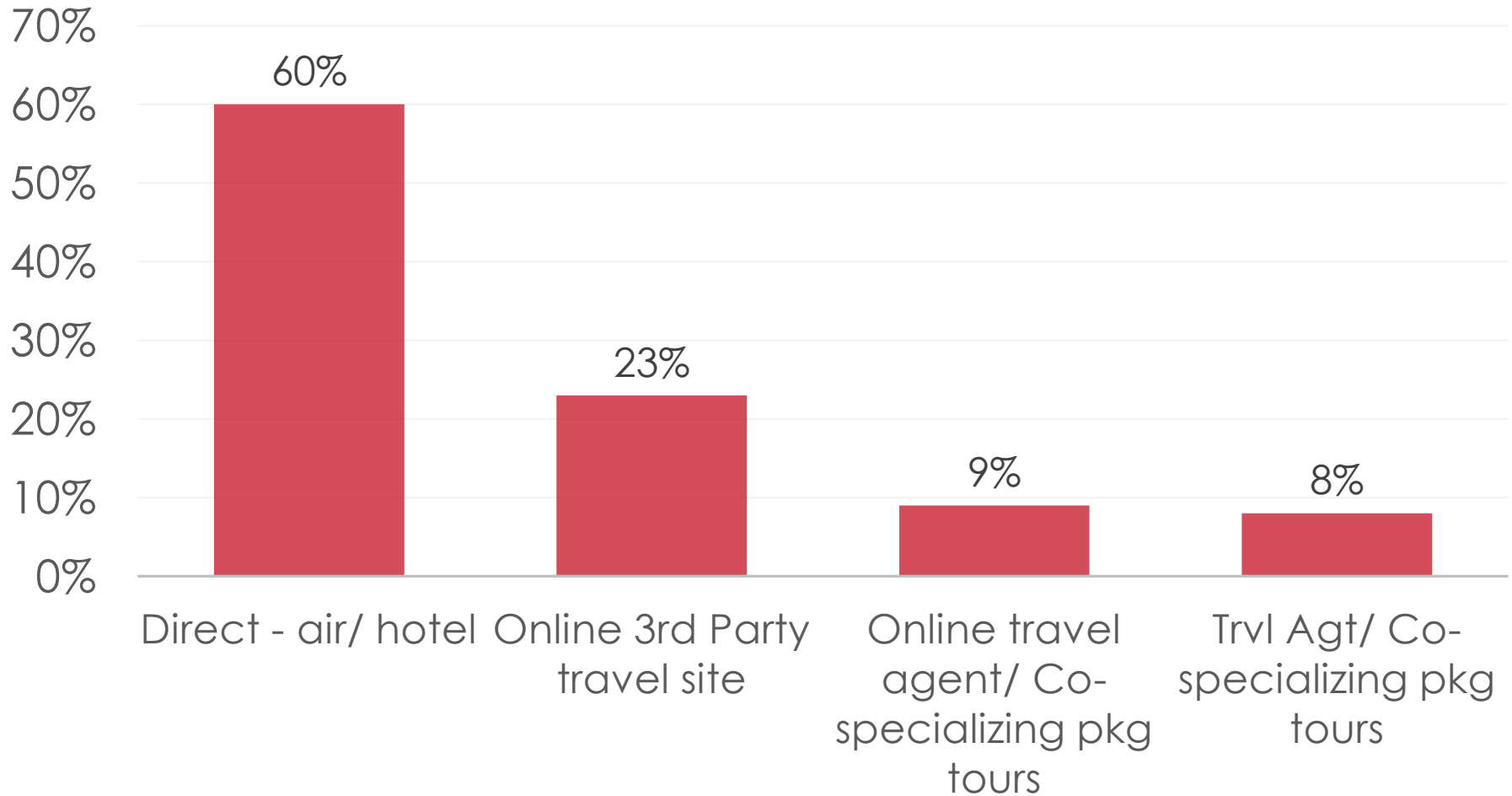
Organized Group Tour



— Organized Group Tour

FY2017			
5%			

Travel Arrangements

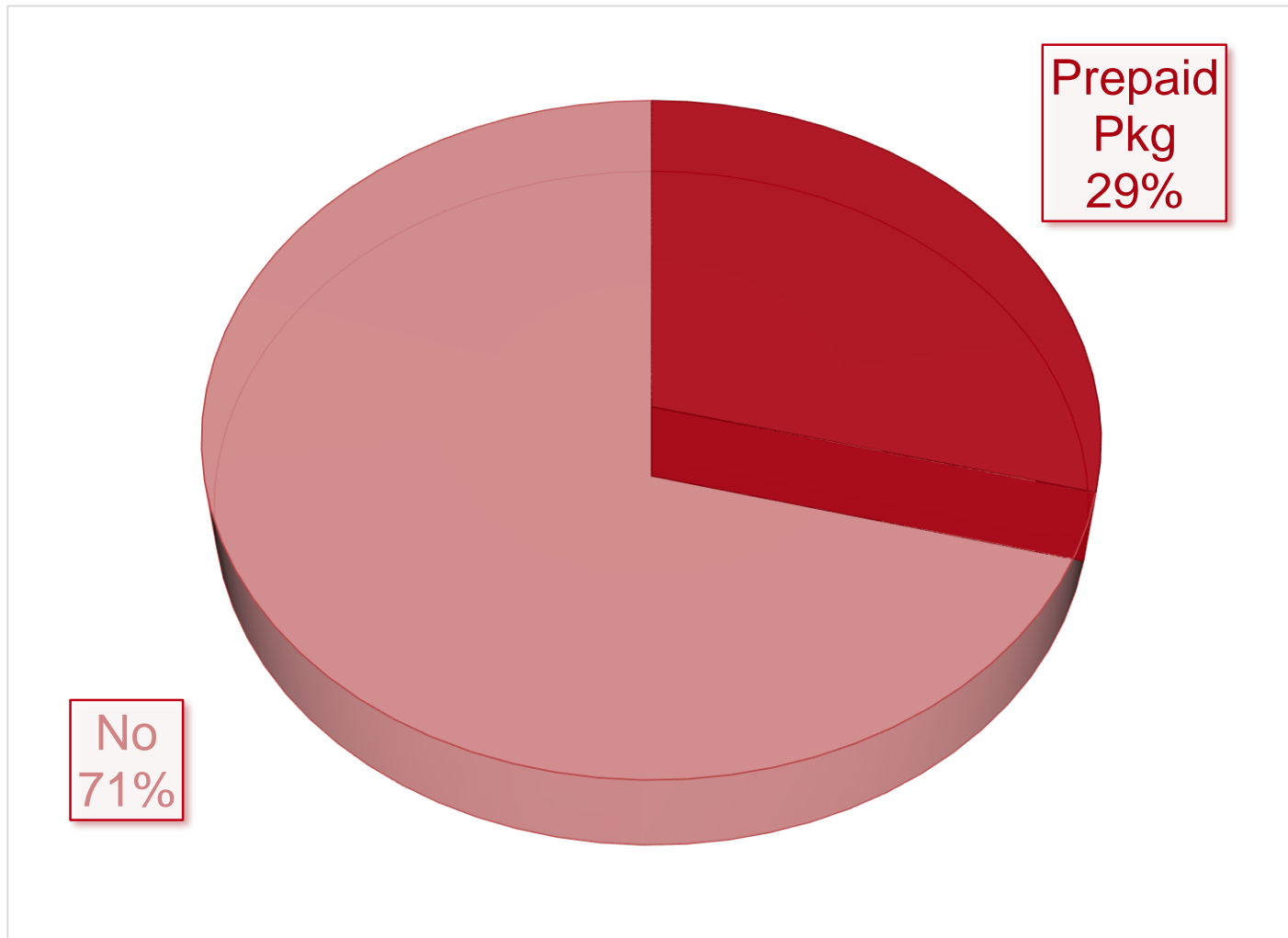


Travel Arrangements

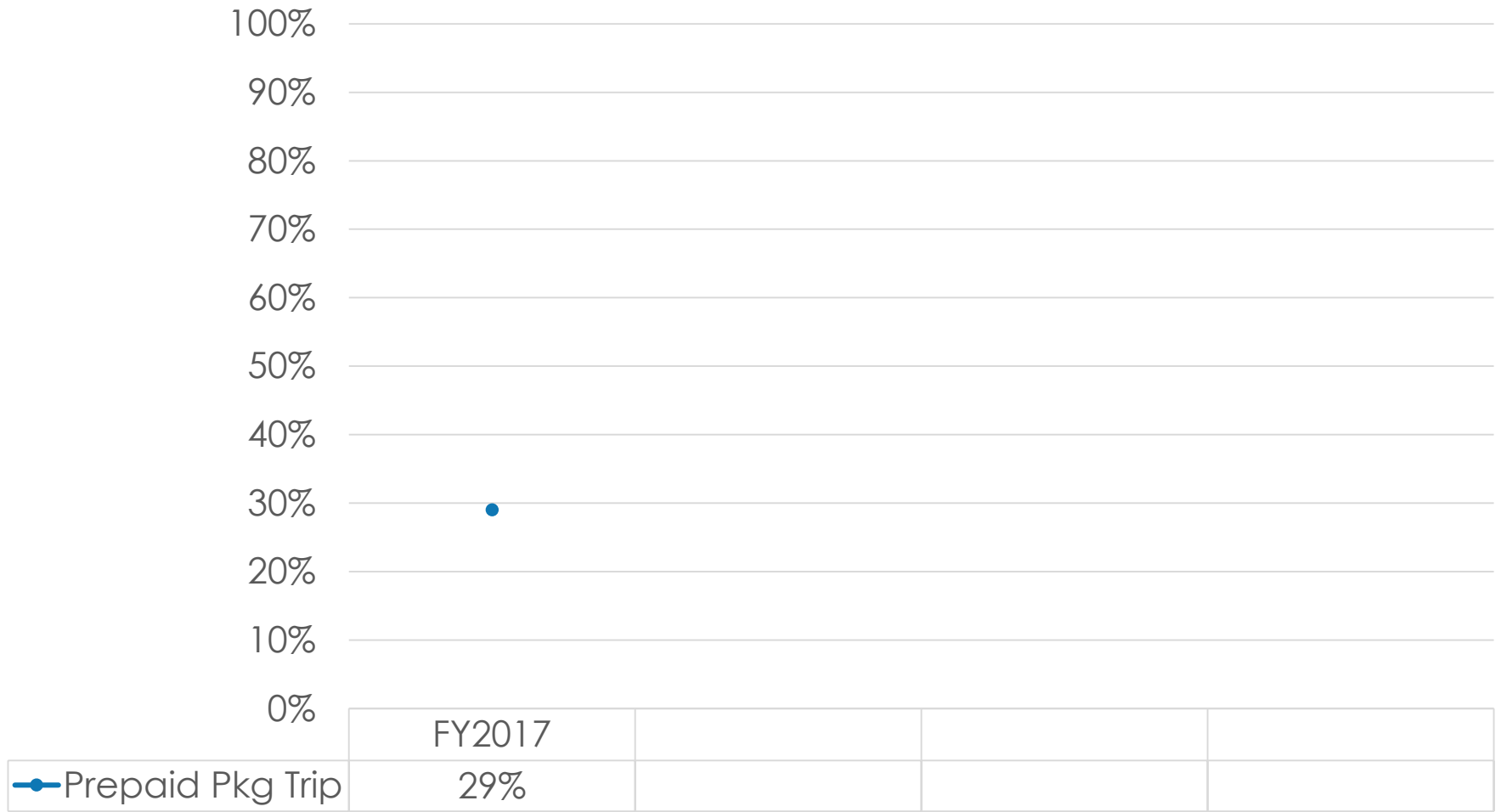


	FY2017			
Online travel agent	9%			
Trvl Agt/ Co- Pkg Tour	8%			
Online 3rd Party	23%			
Direct Air/ Hotel	60%			

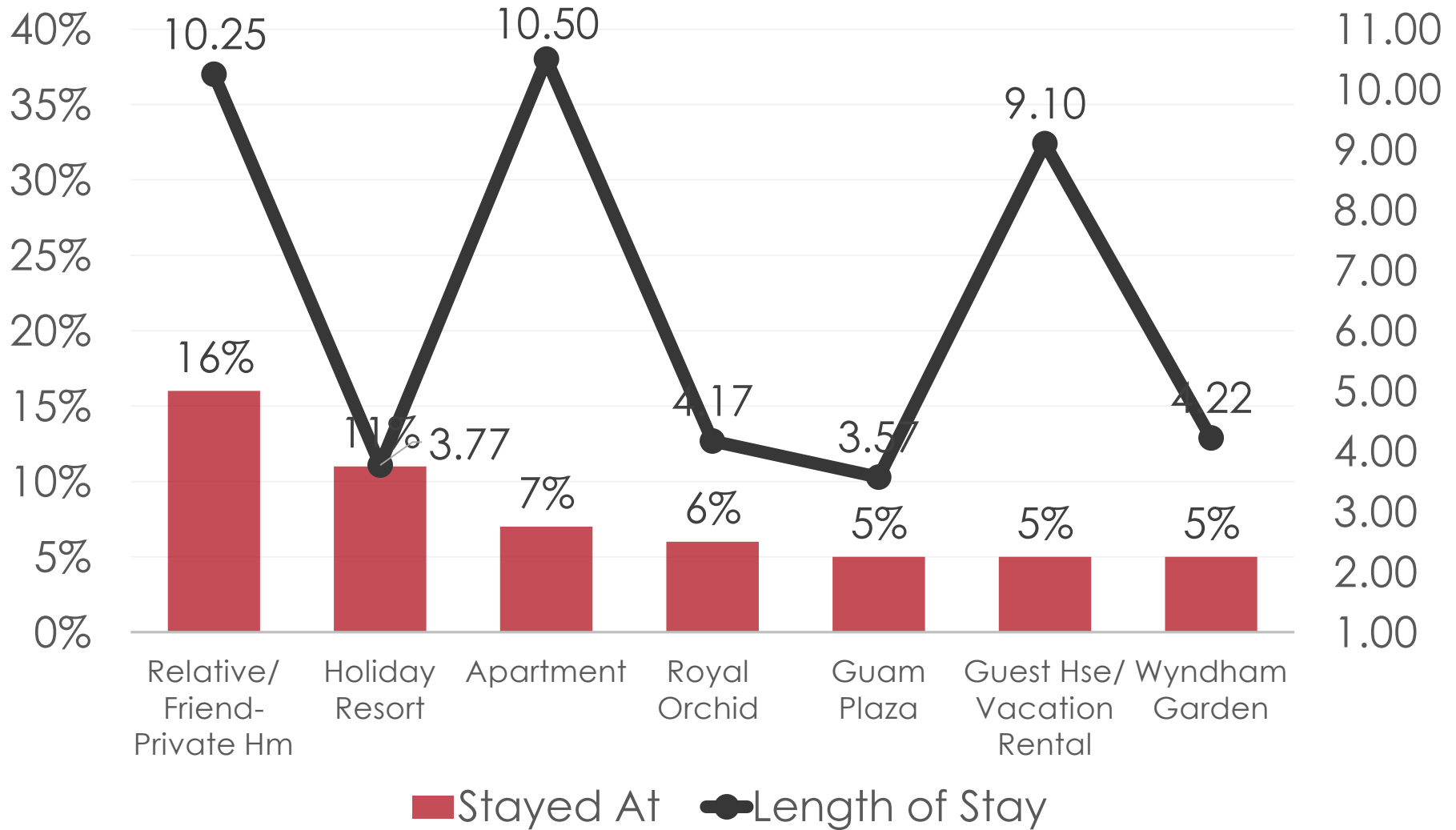
Prepaid Package Trip



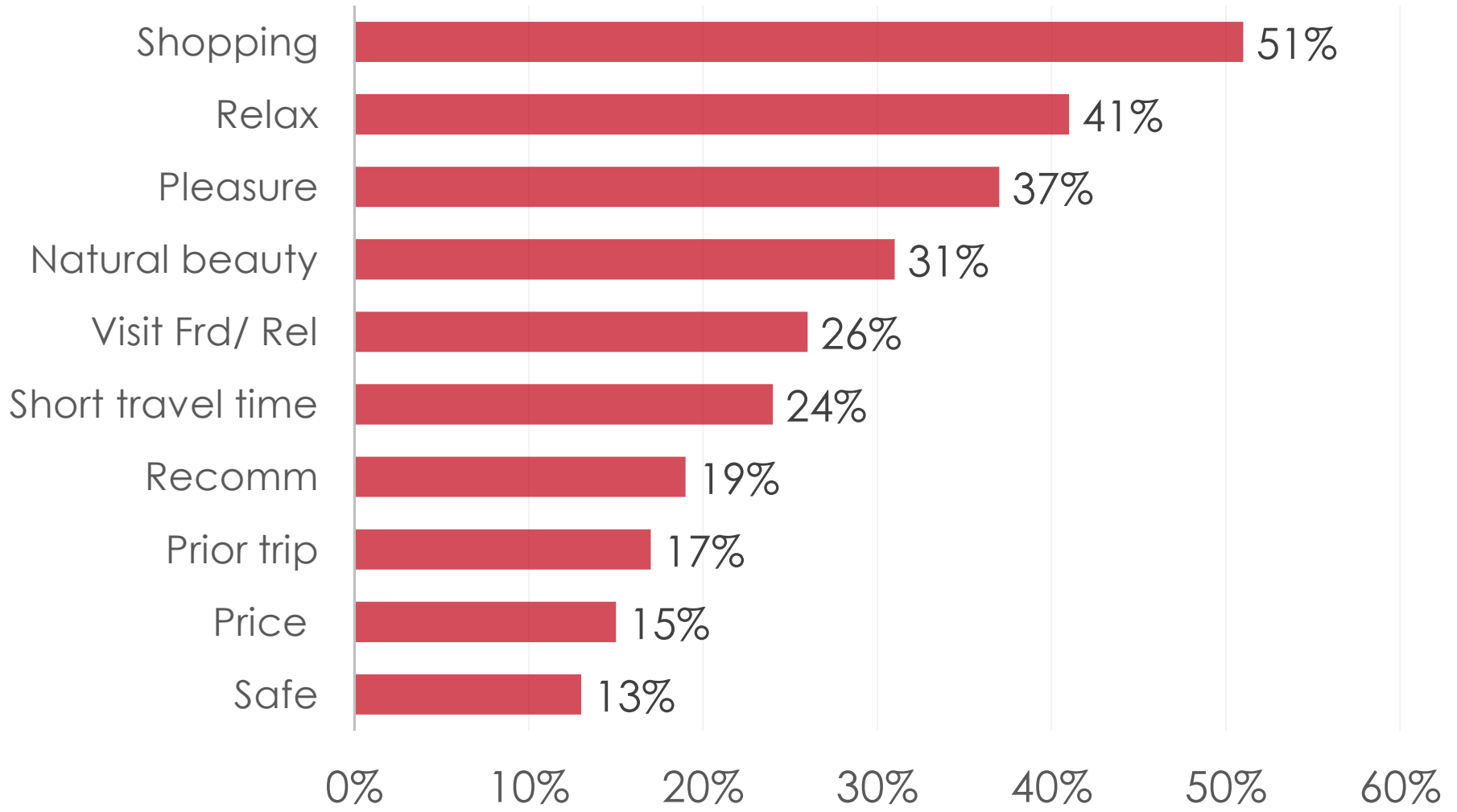
Prepaid Package Trip



Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Top 3

FY2015	FY2016	FY2017
23% Visit friend/ relative 19% Shopping 12% Relax	18% Visit friend/ relative 18% Shopping 15% Relax	51% Shopping 41% Relax 37% Pleasure/ Vacation

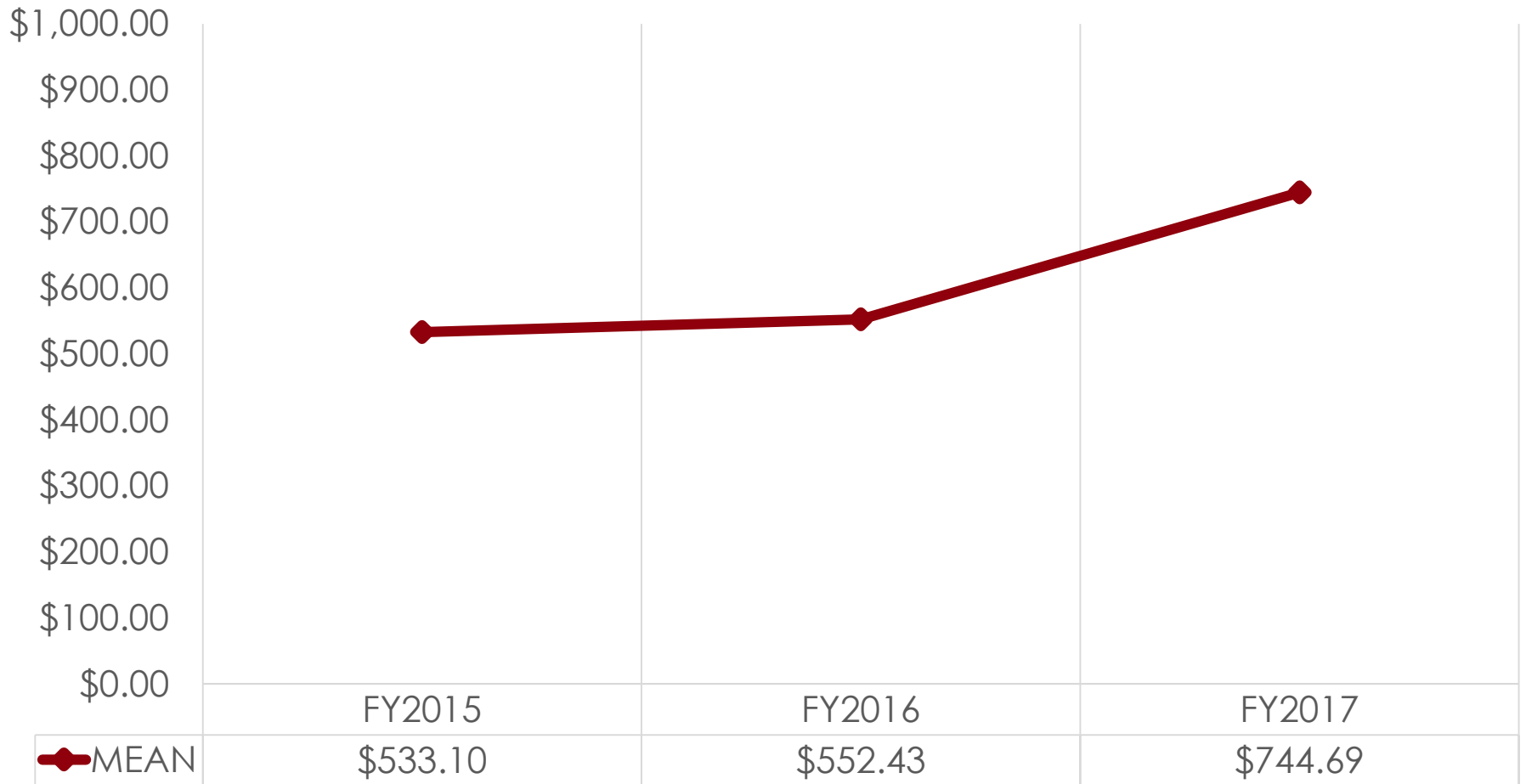
SECTION 3

EXPENDITURES

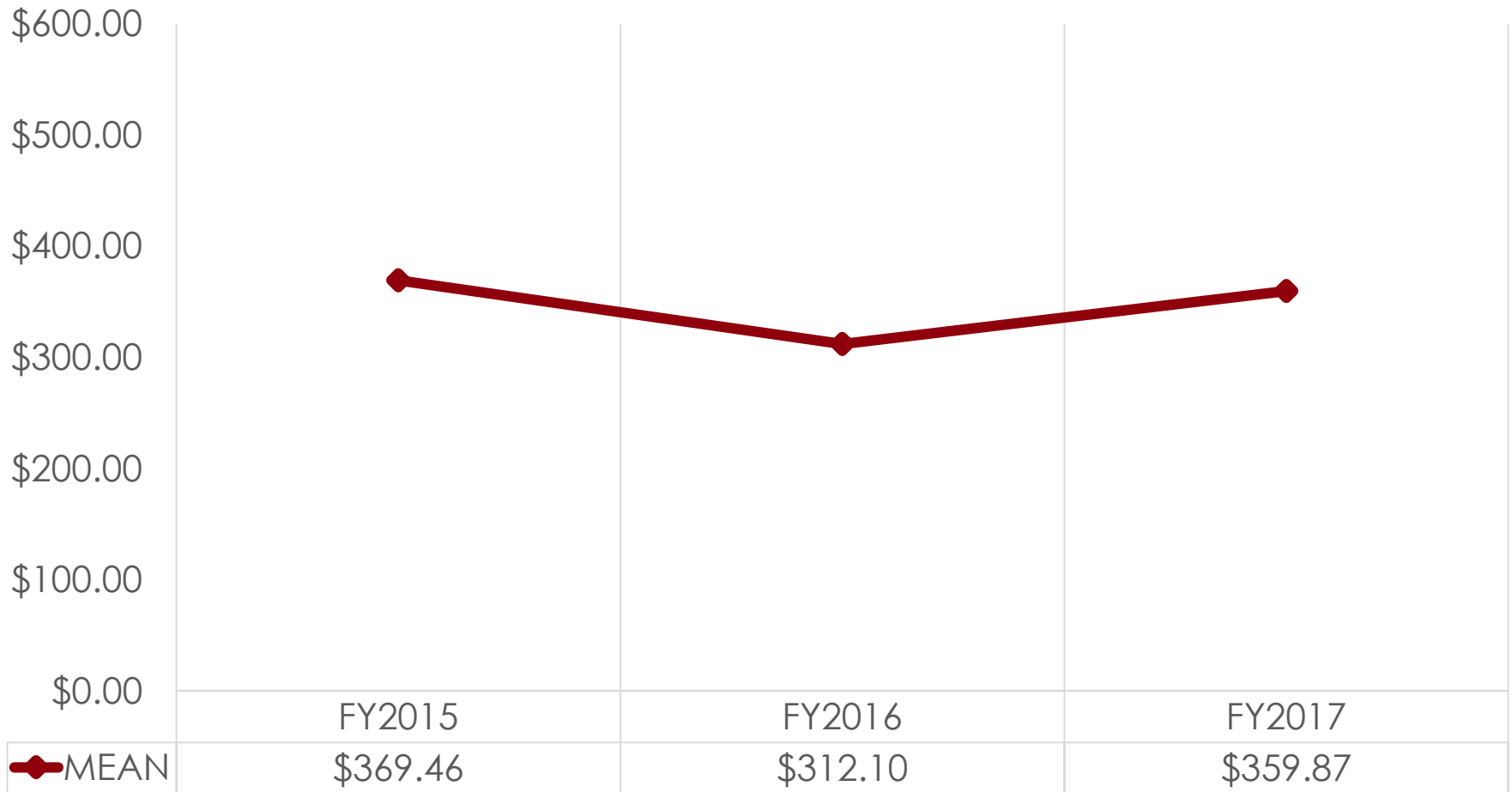
Prepaid Expenditures

- \$744.69 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$359.87 = overall mean average per person prepaid expenditures

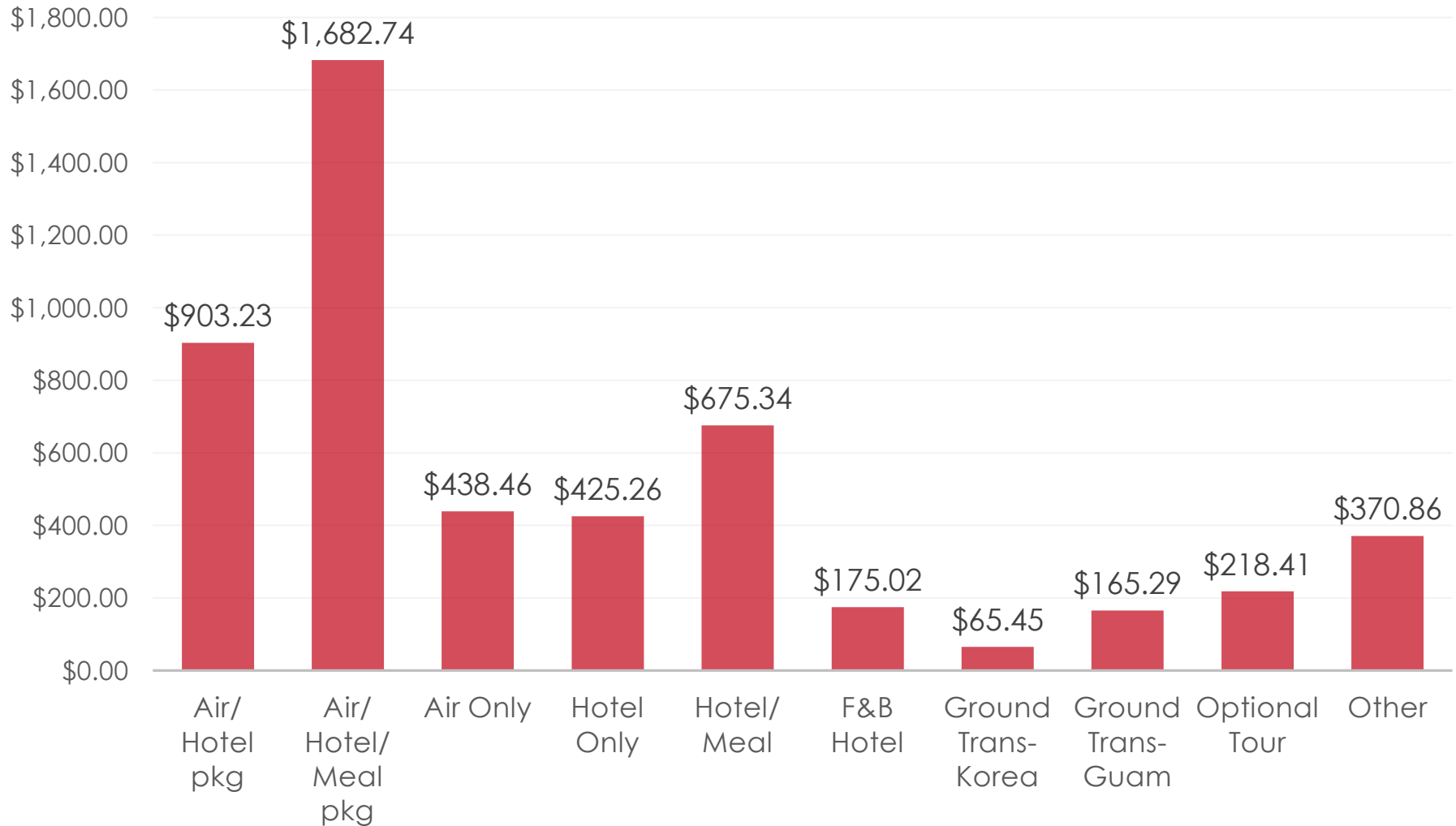
Prepaid Entire Travel Party – Tracking



Prepaid Per Person – Tracking

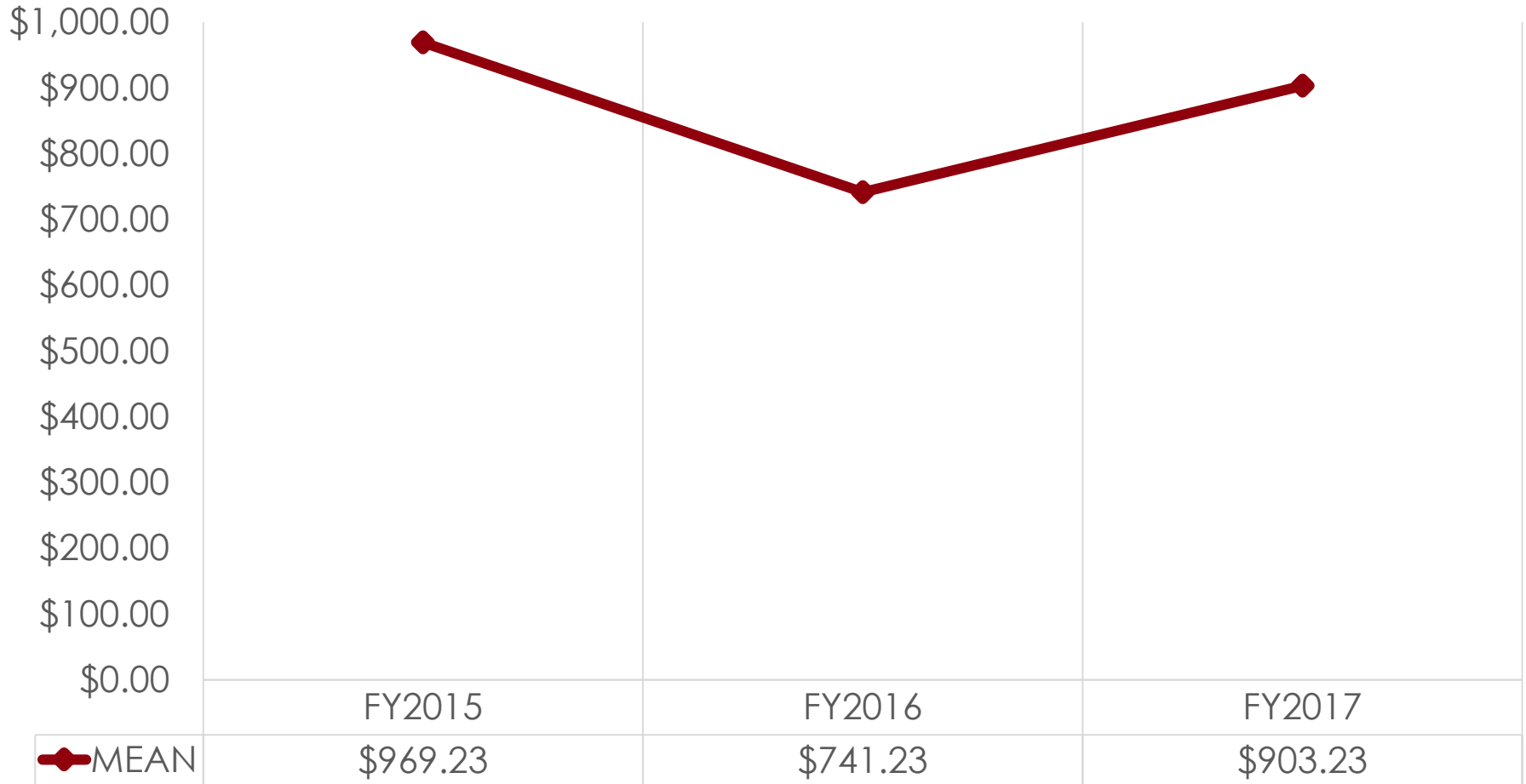


Prepaid Expenses by Category – Mean Entire Travel Party



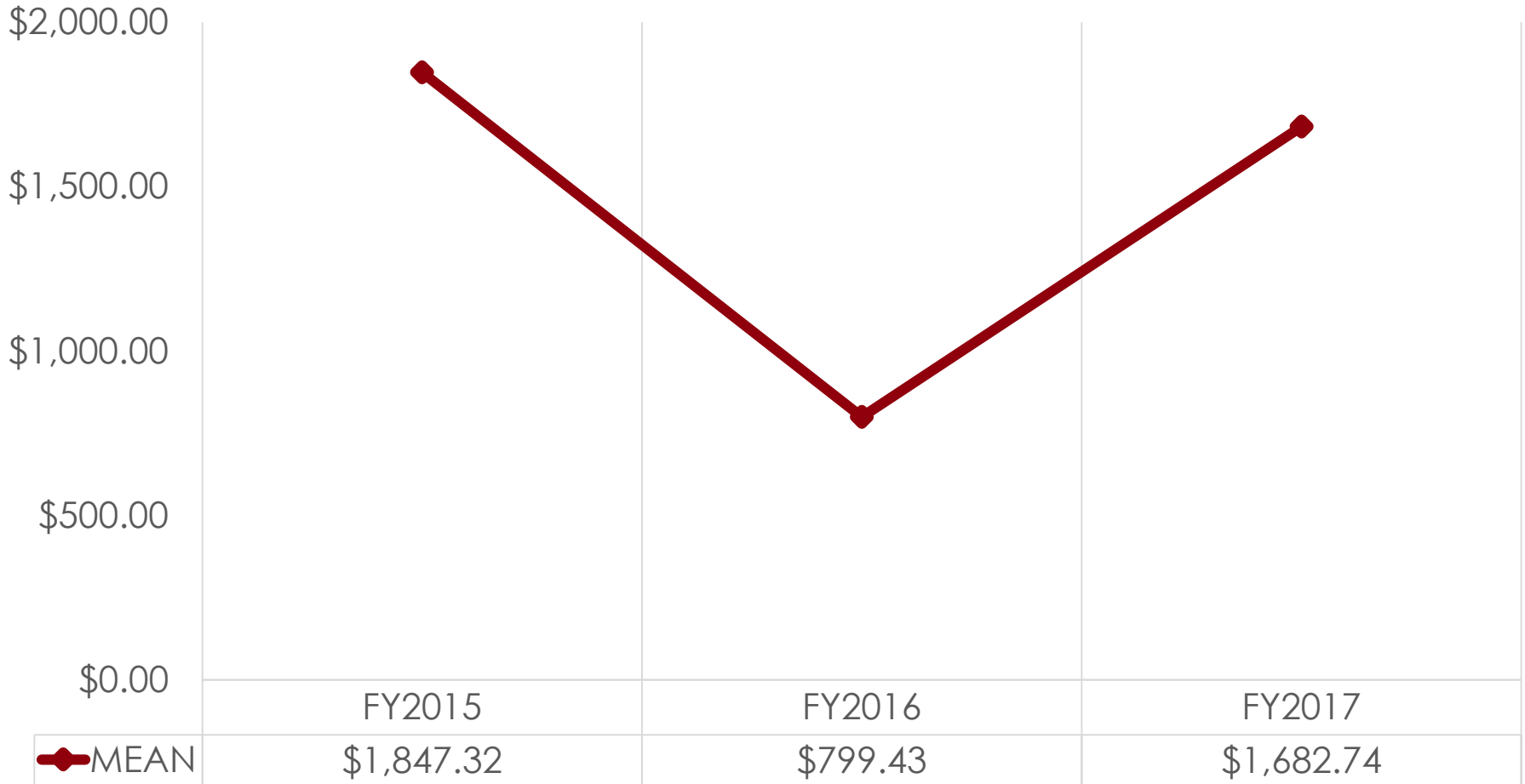
Prepaid – Tracking

Airfare & Accommodation Packages

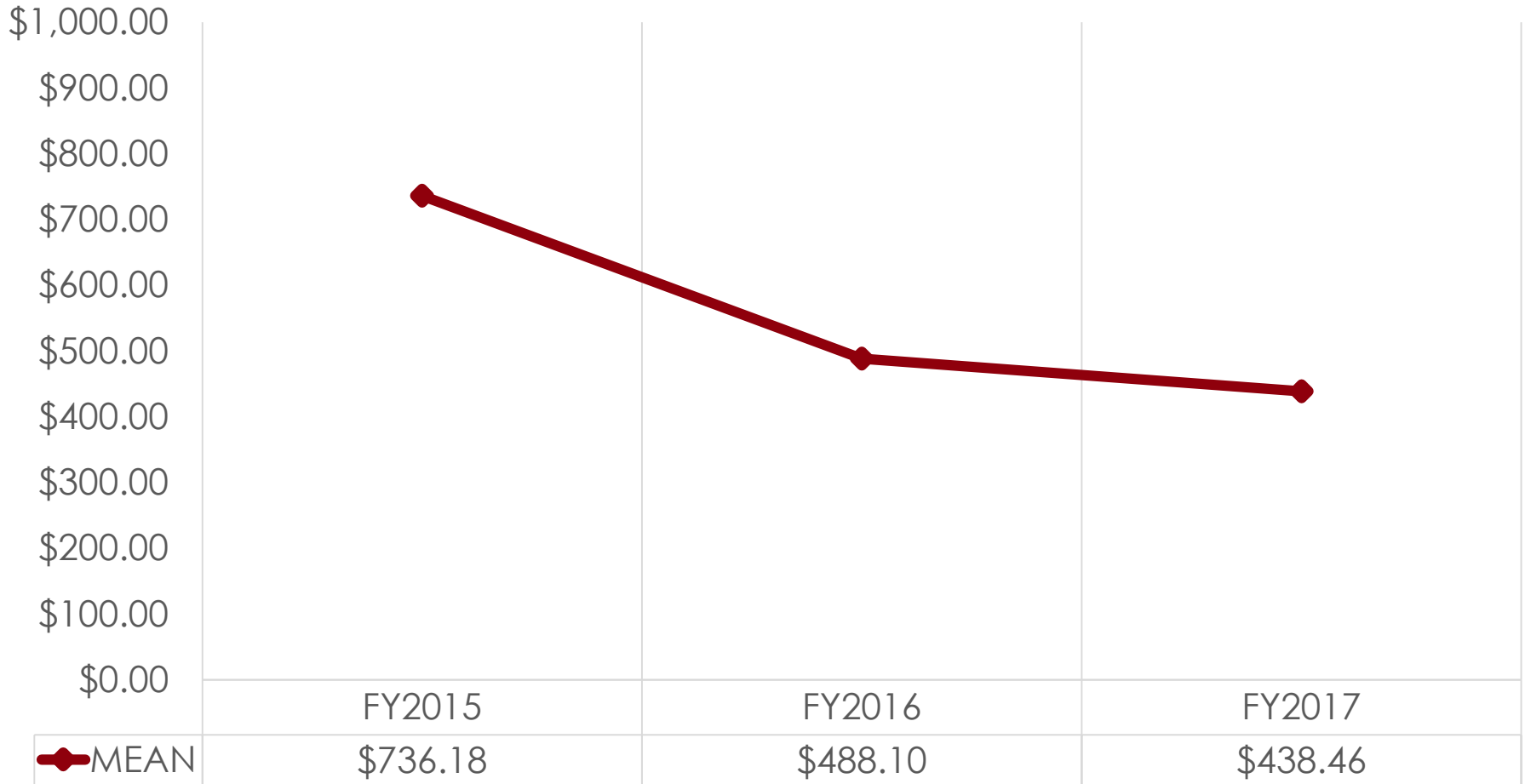


Prepaid – Tracking

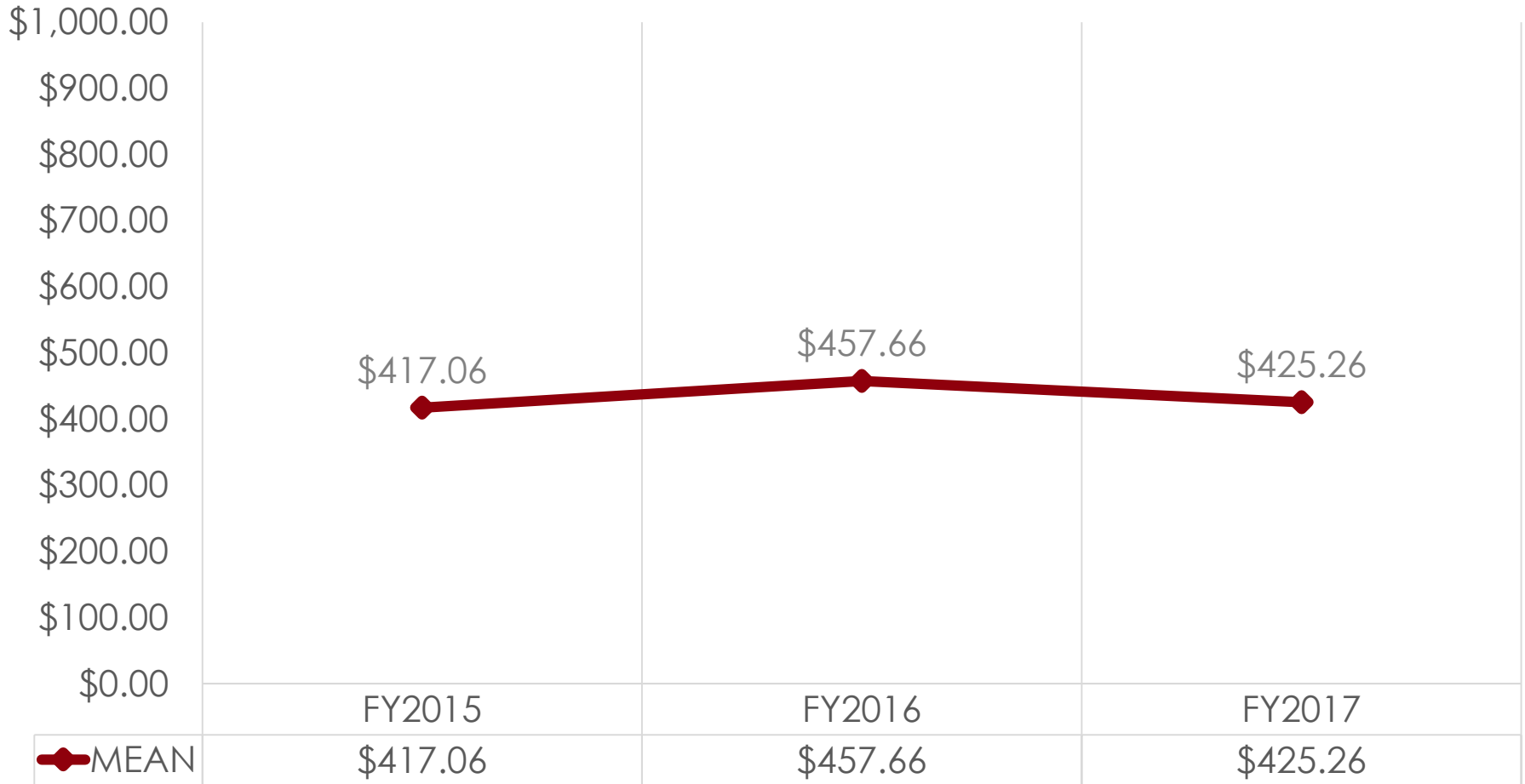
Airfare & Accommodation W/ Meal Packages



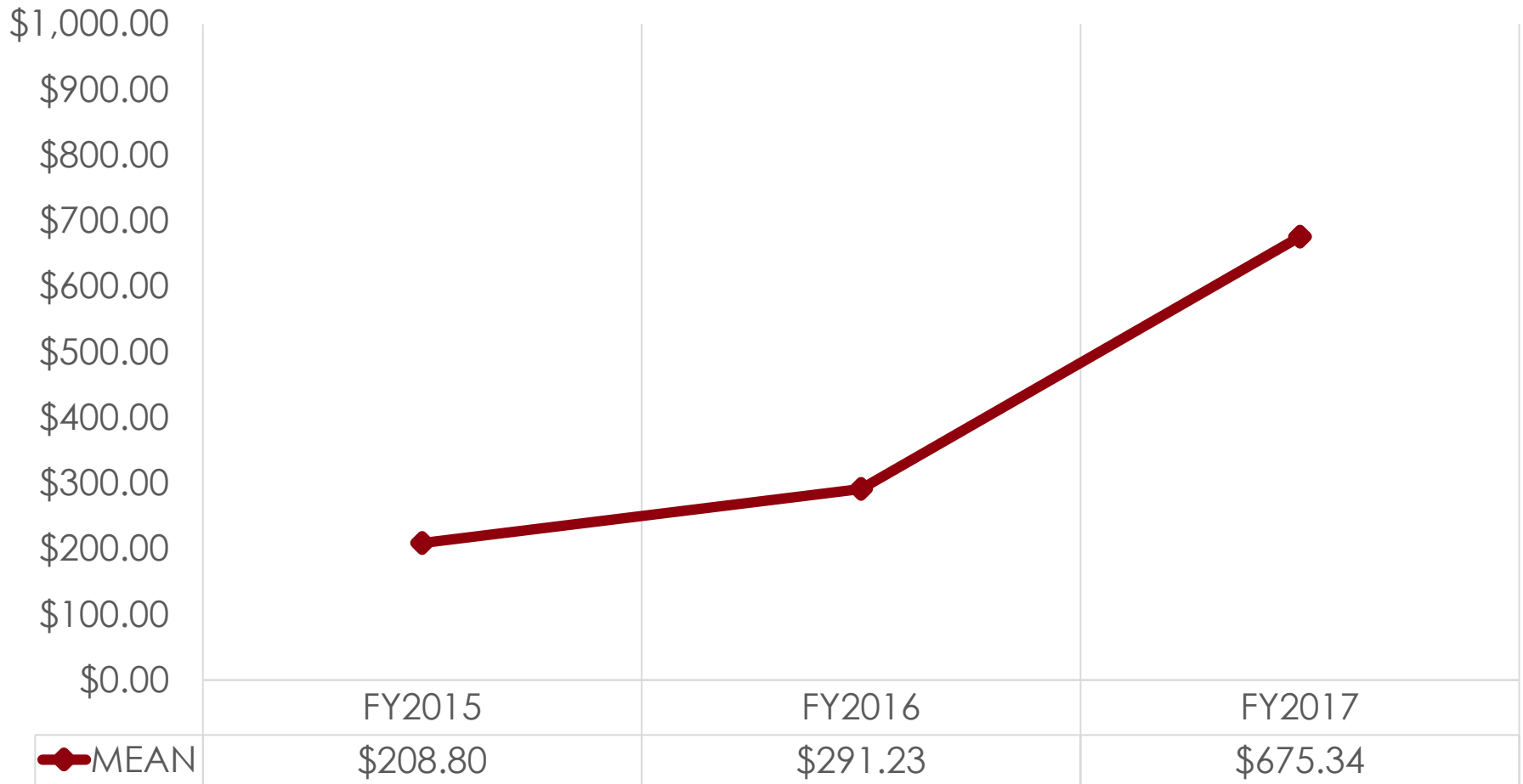
Prepaid – Tracking Airfare Only



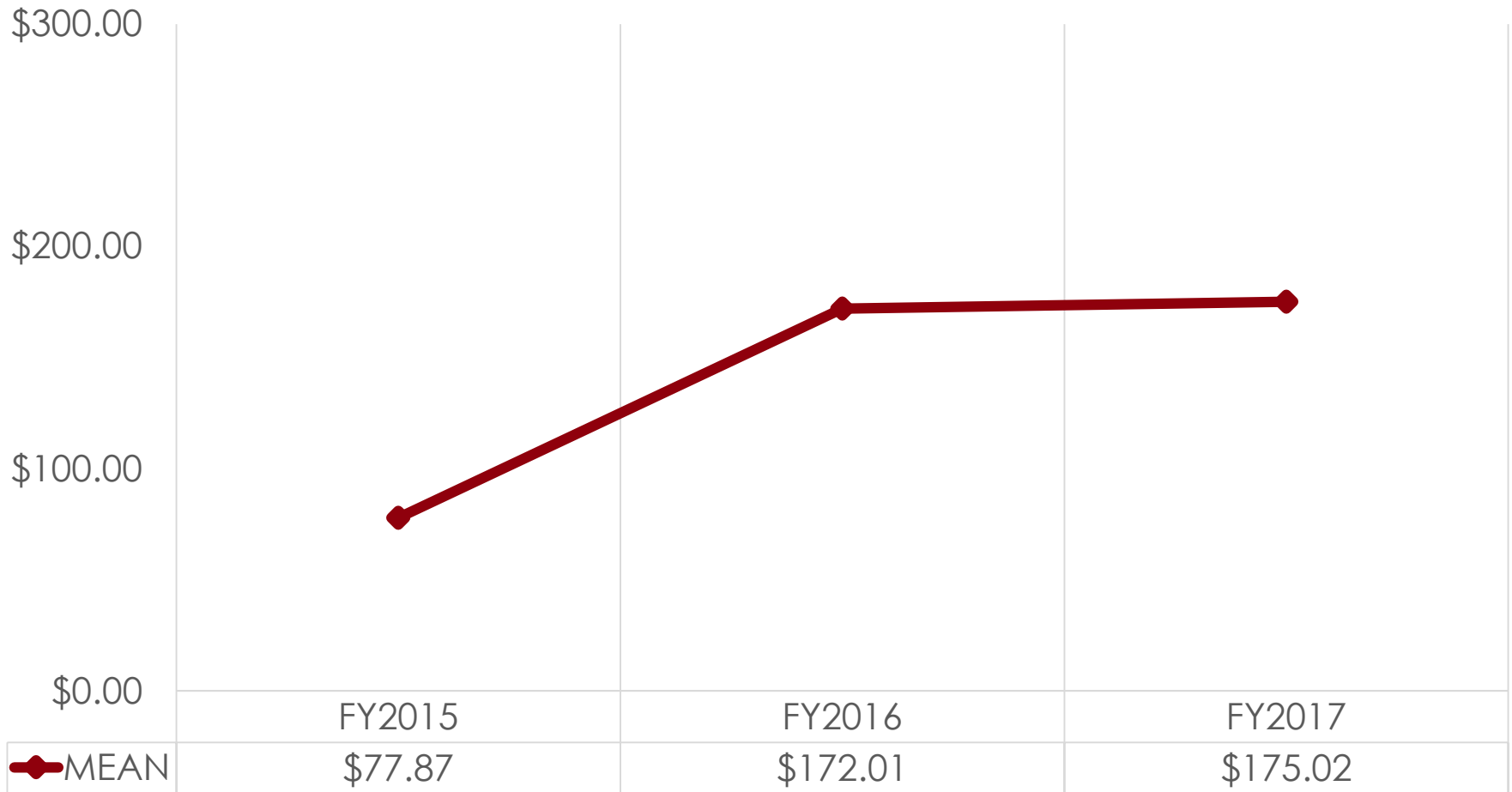
Prepaid – Tracking Accommodations Only



Prepaid – Tracking Accommodations w/ Meal Only

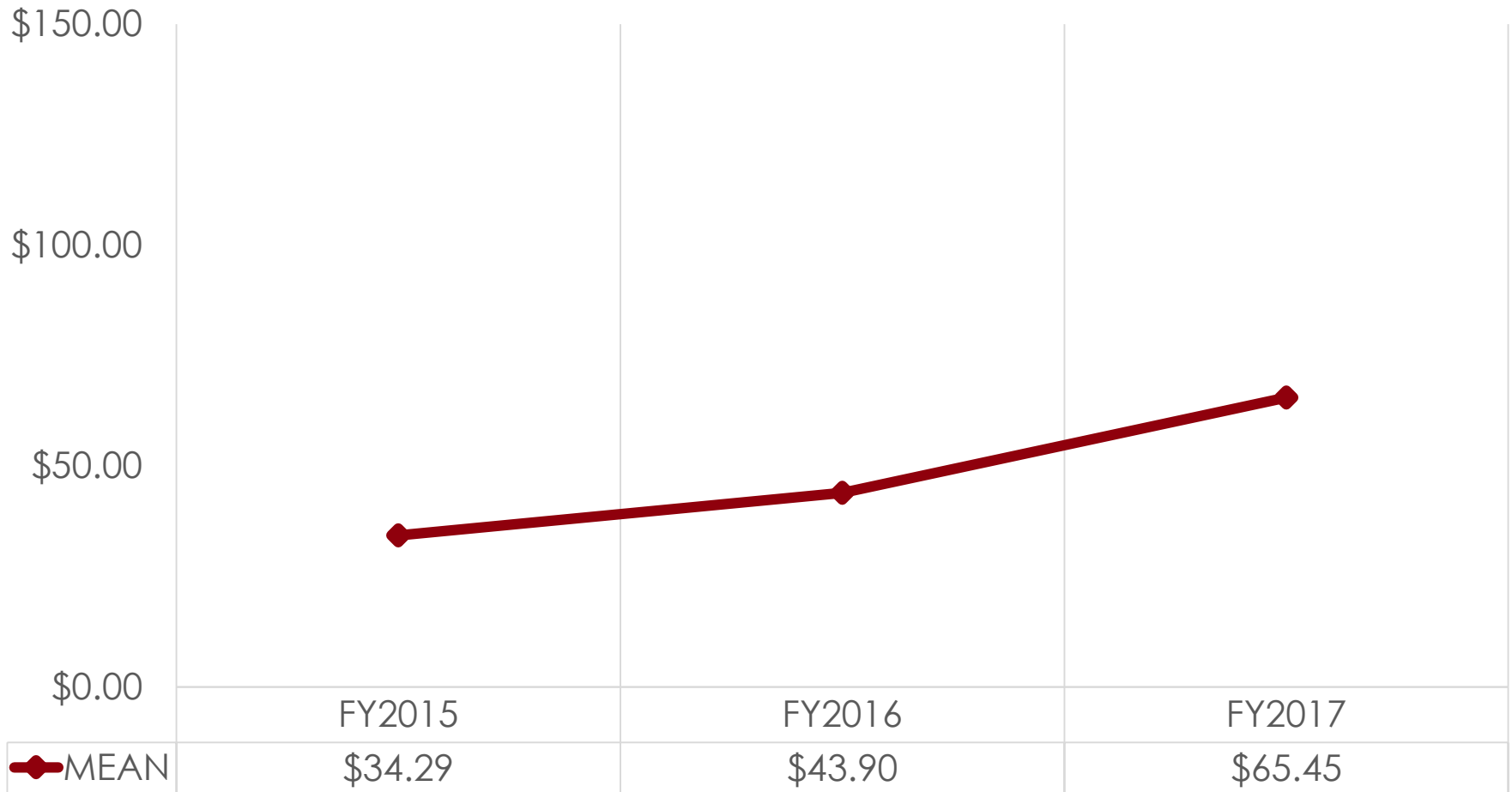


Prepaid – Tracking Food & Beverage in Hotel



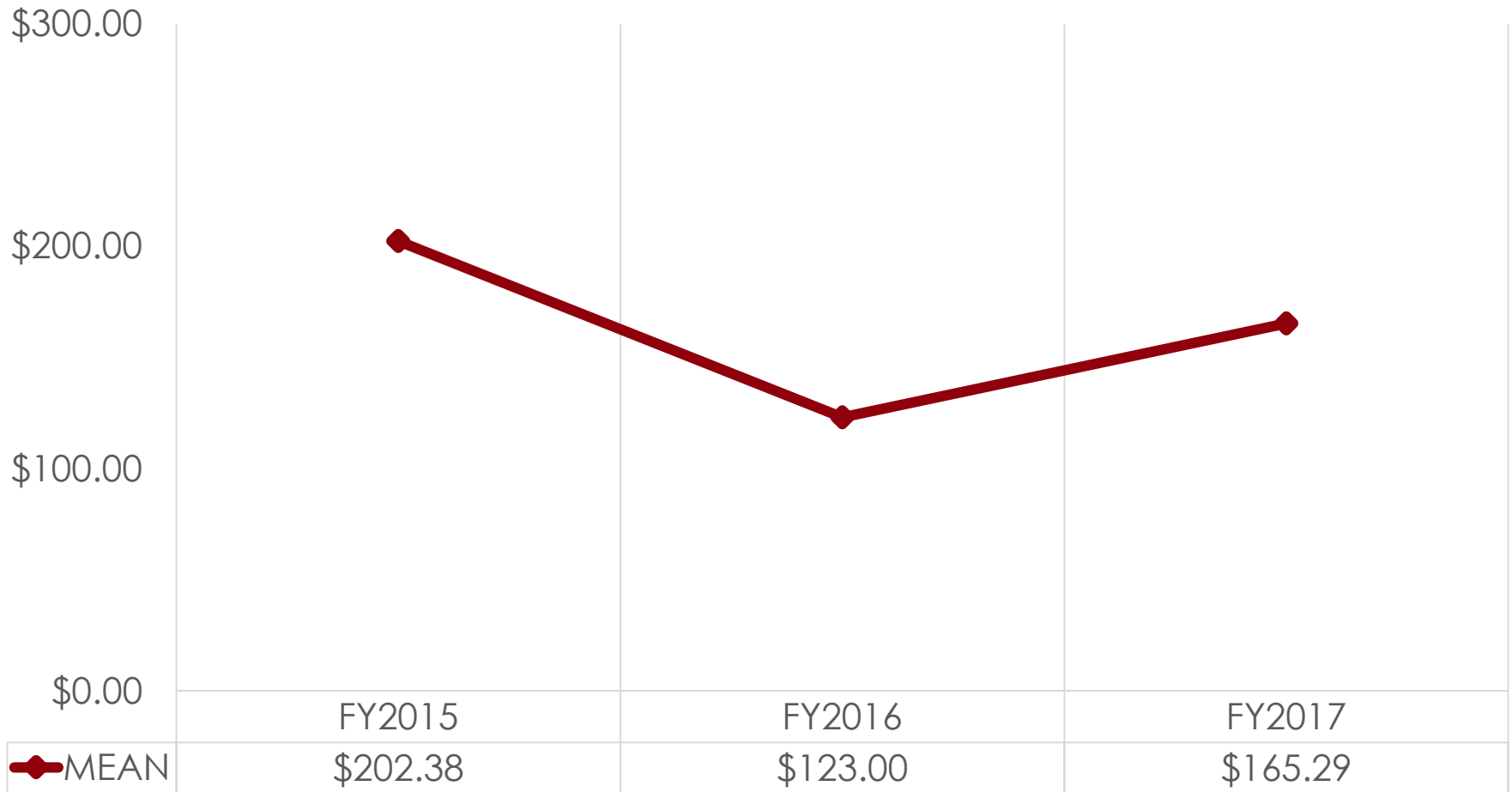
Prepaid – Tracking

Ground Transportation - Philippines

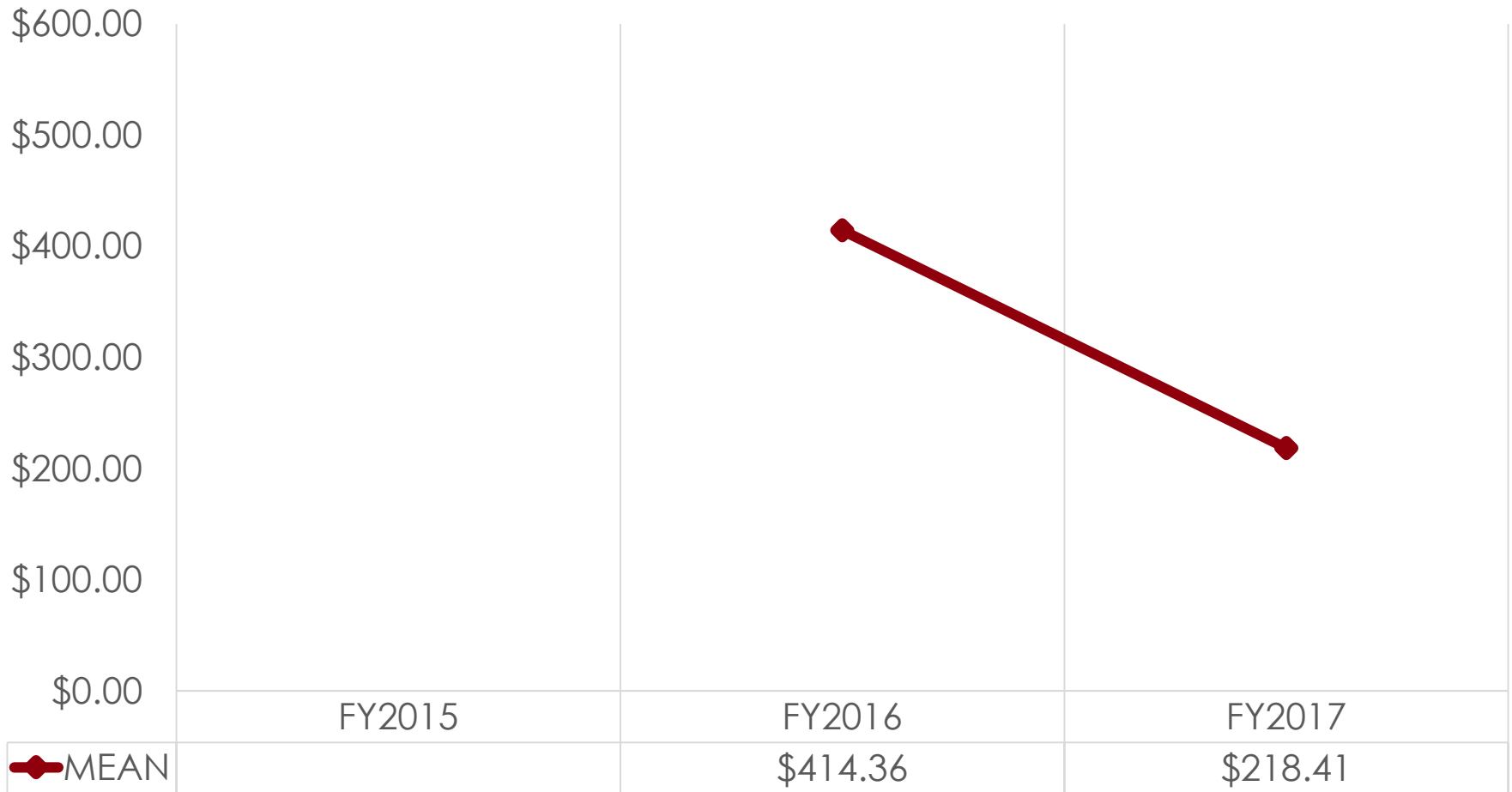


Prepaid – Tracking

Ground Transportation - Guam



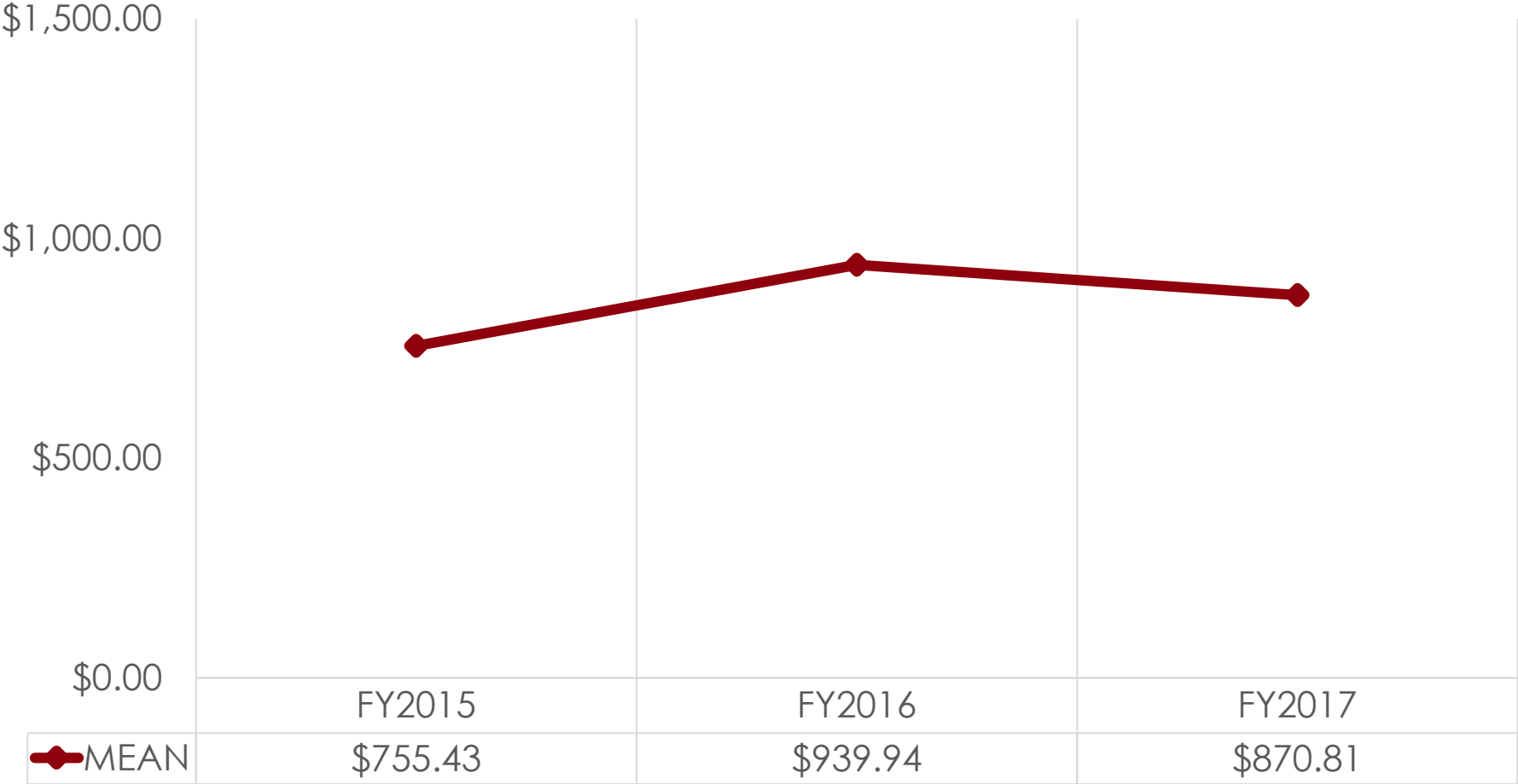
Prepaid – Tracking Optional tours/ Activities



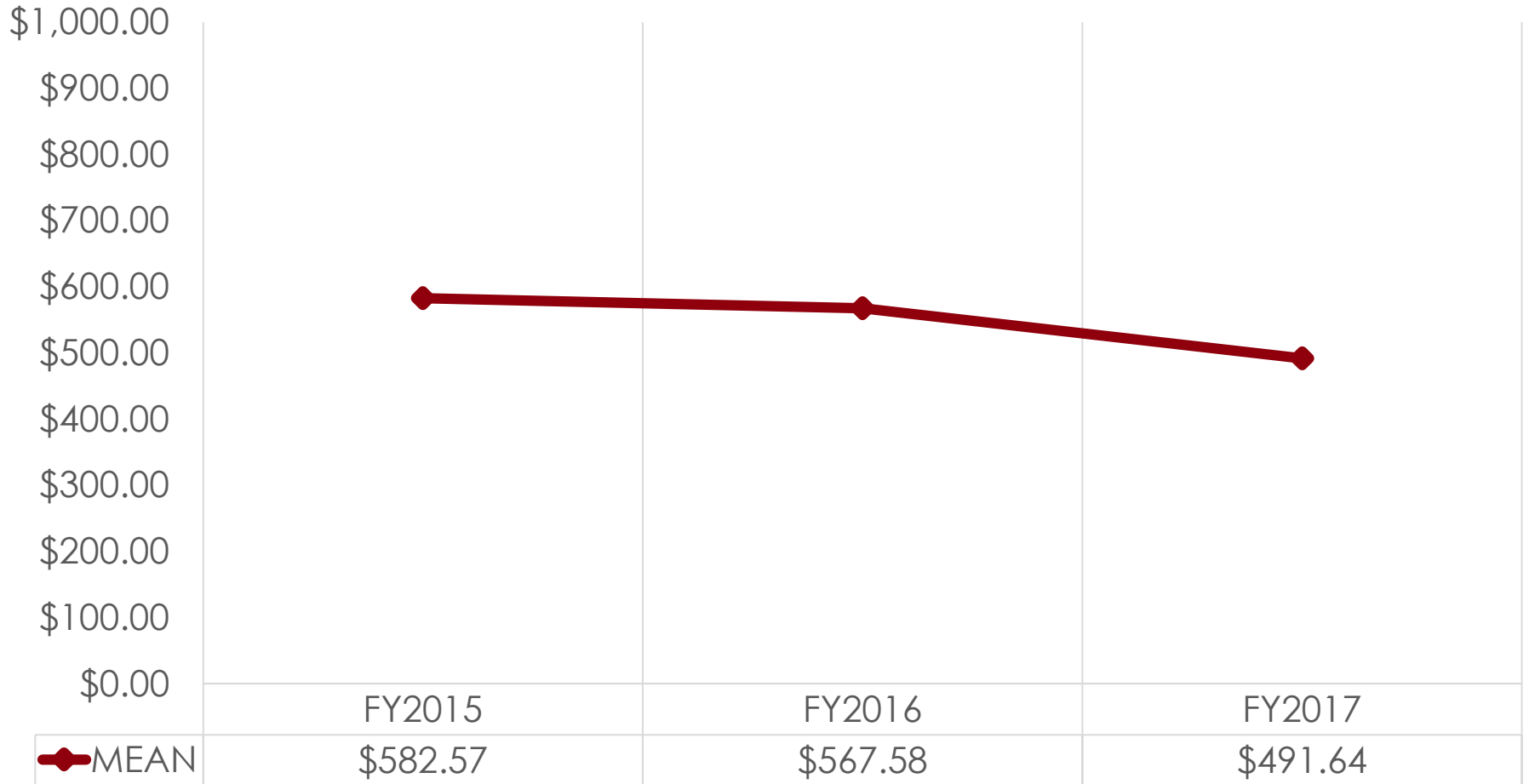
On-Island Expenditures

- \$870.81 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$491.64 = overall mean average per person prepaid expenditures

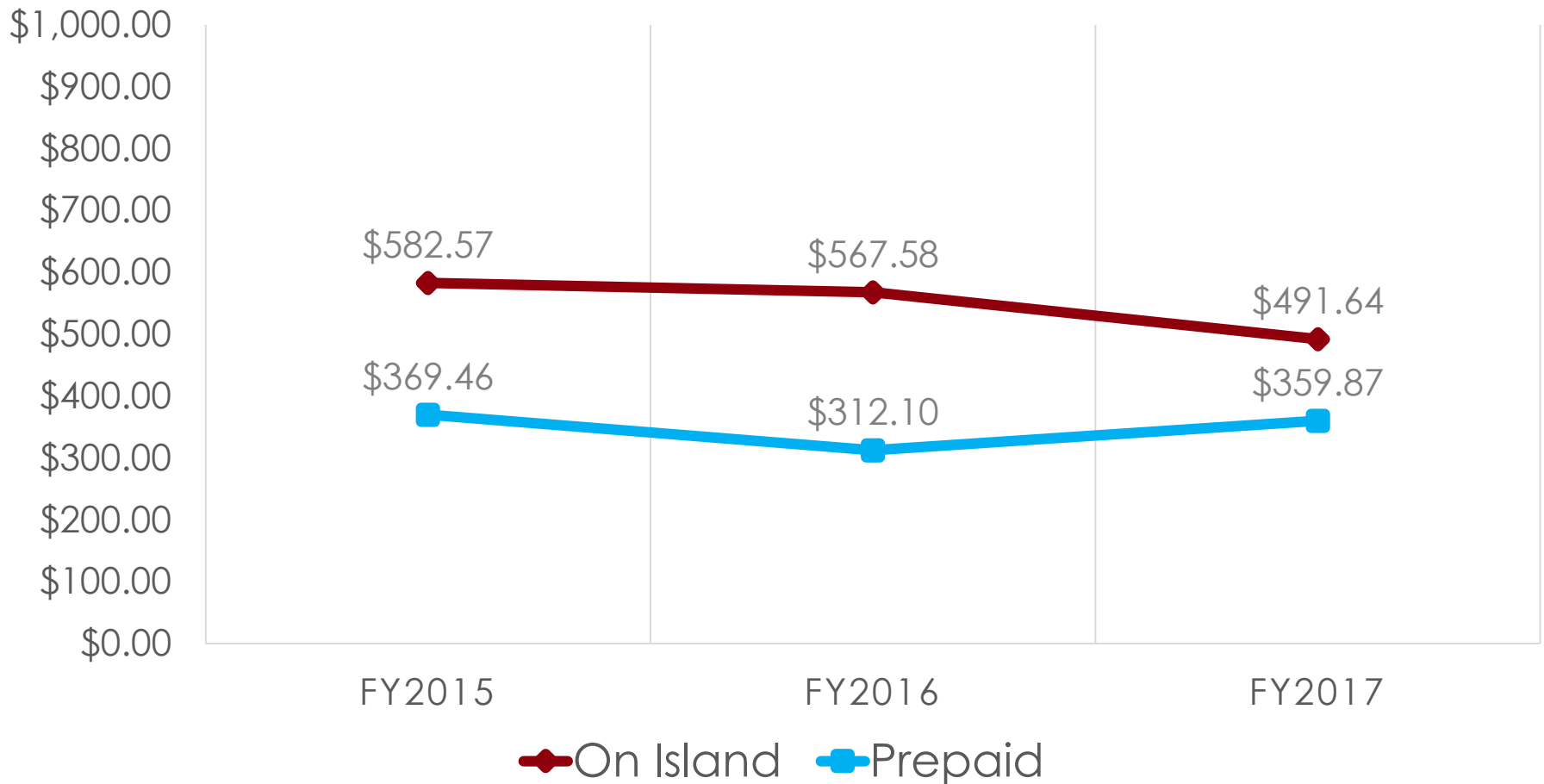
On-Island Entire Travel Party – Tracking



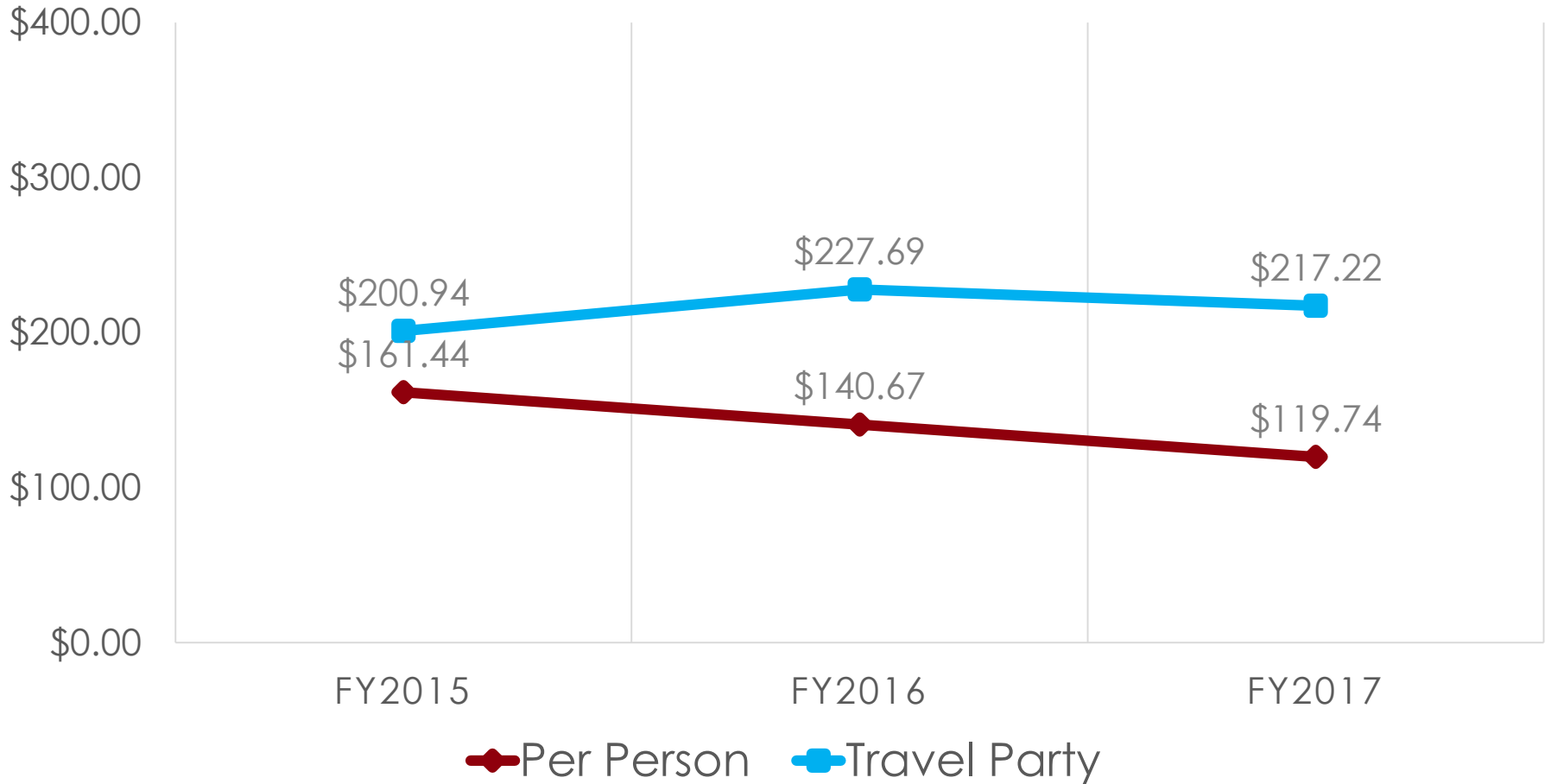
On-Island Per Person – Tracking



Per Person MEAN expenditures – Tracking On-Island/ Prepaid



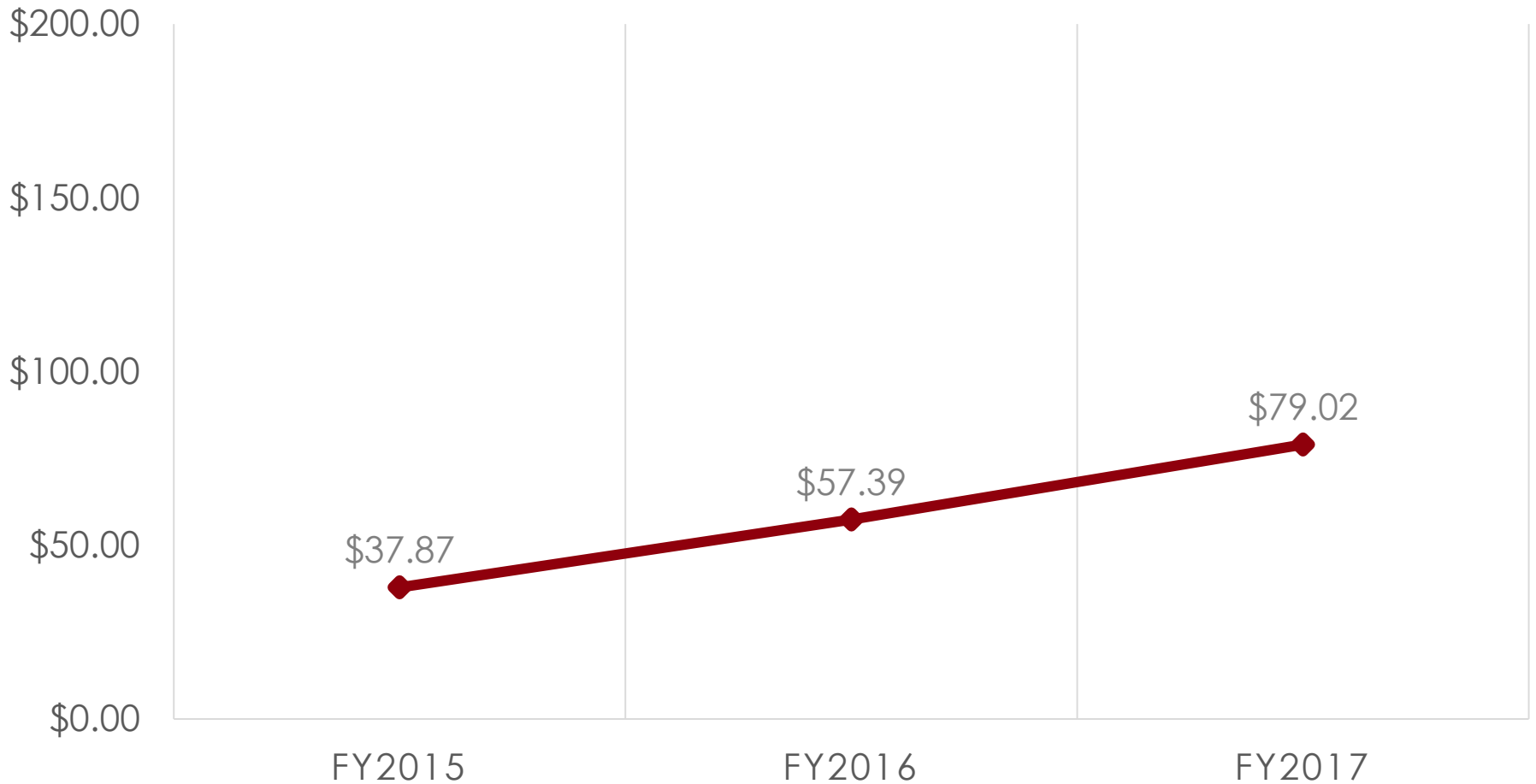
On-Island Per Day Spending – Tracking Mean



On-Island Expenses by Category – Mean Entire Travel Party

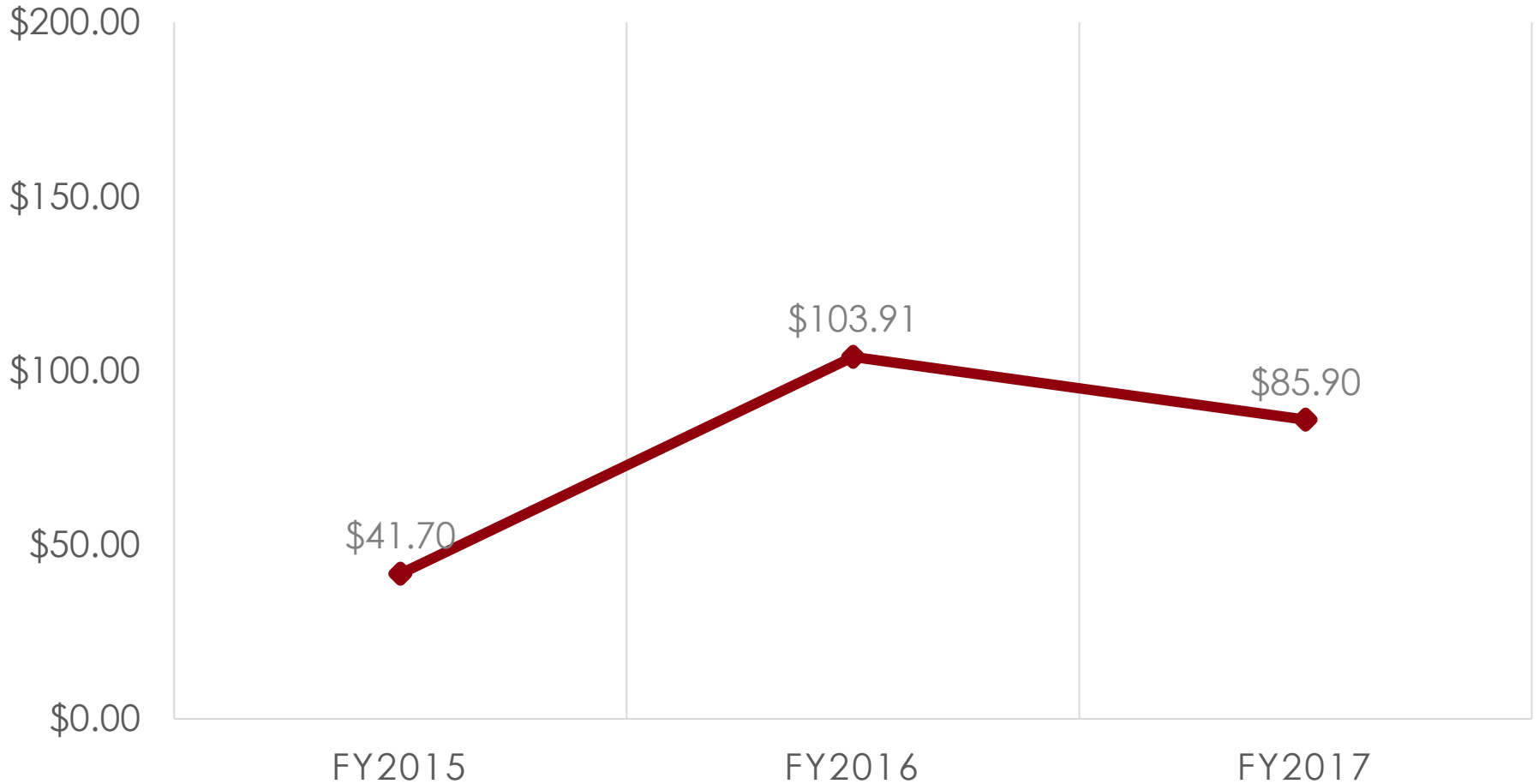


On-Island – Tracking Food & Beverage - Hotel



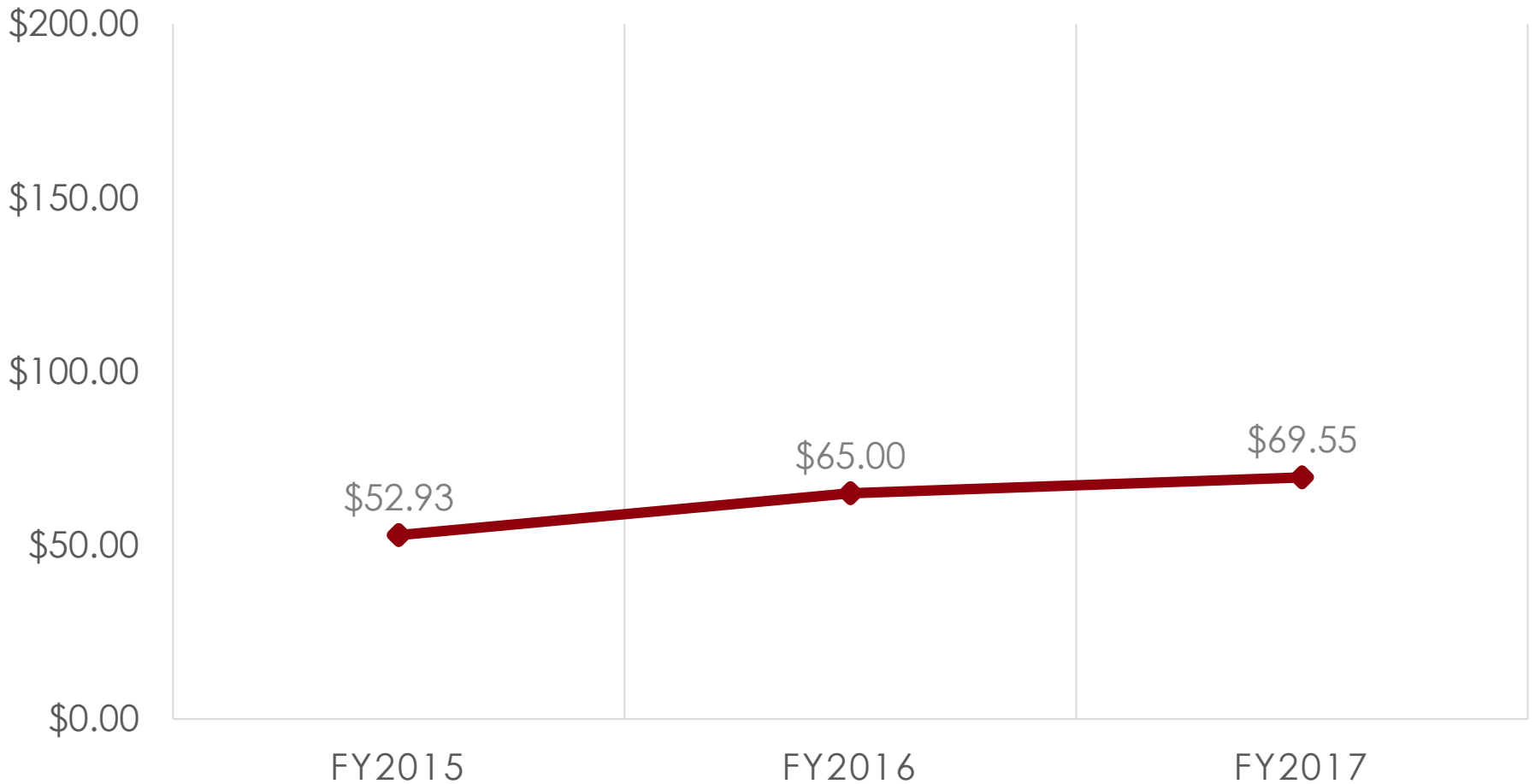
On-Island – Tracking

Food & Beverage – Fast Food/ Convenience Store

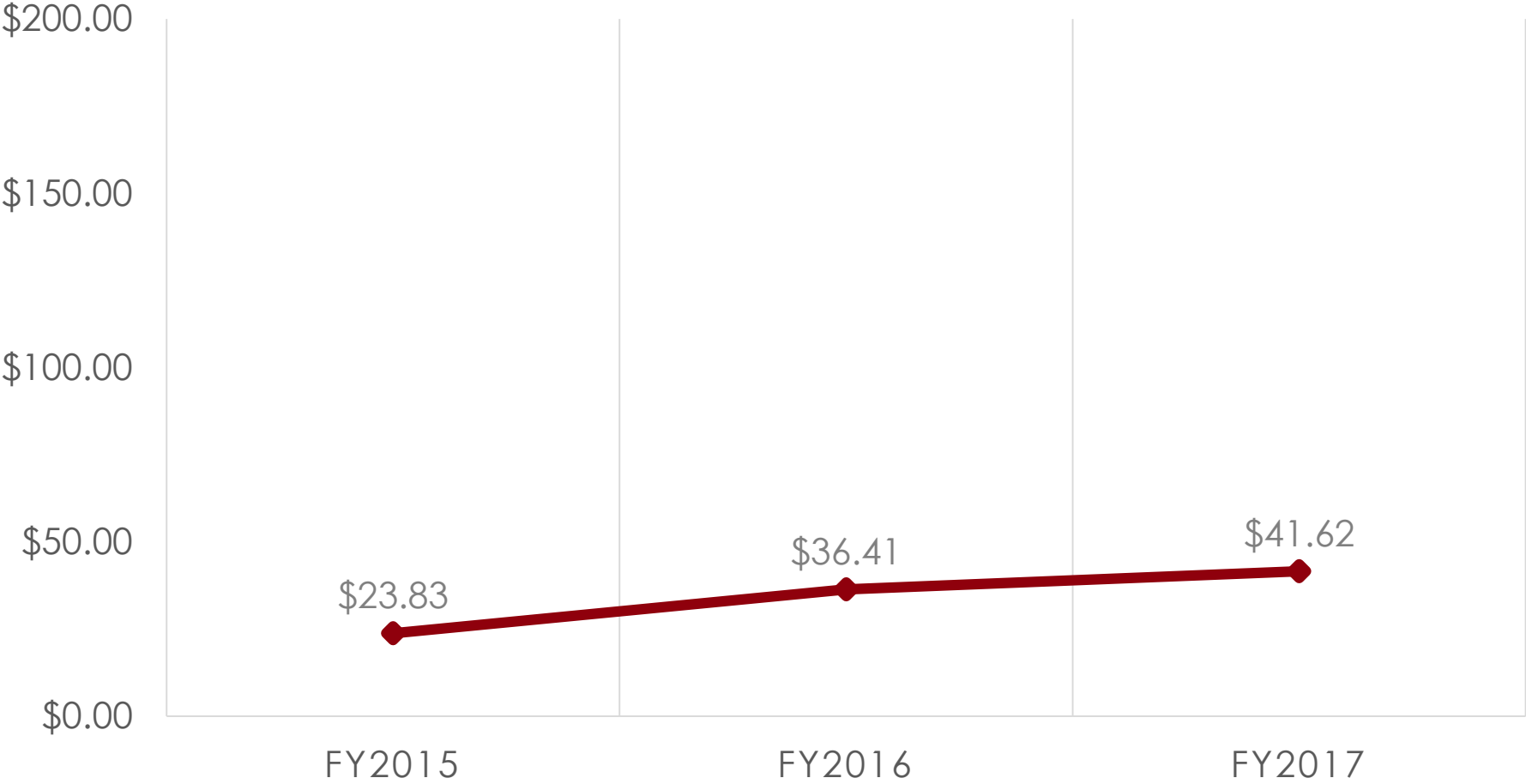


On-Island – Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel

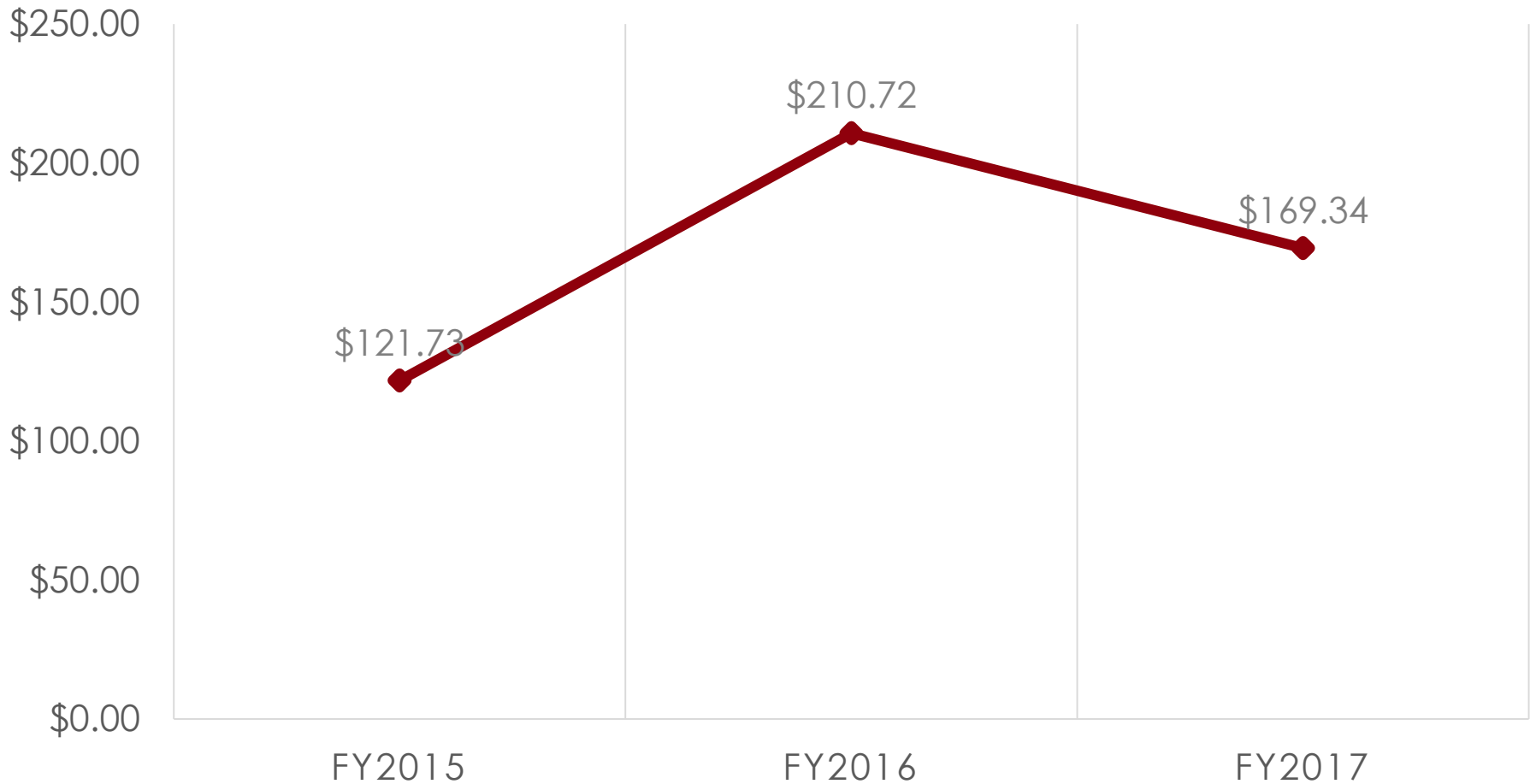


On-Island – Tracking Optional tour/ Activities

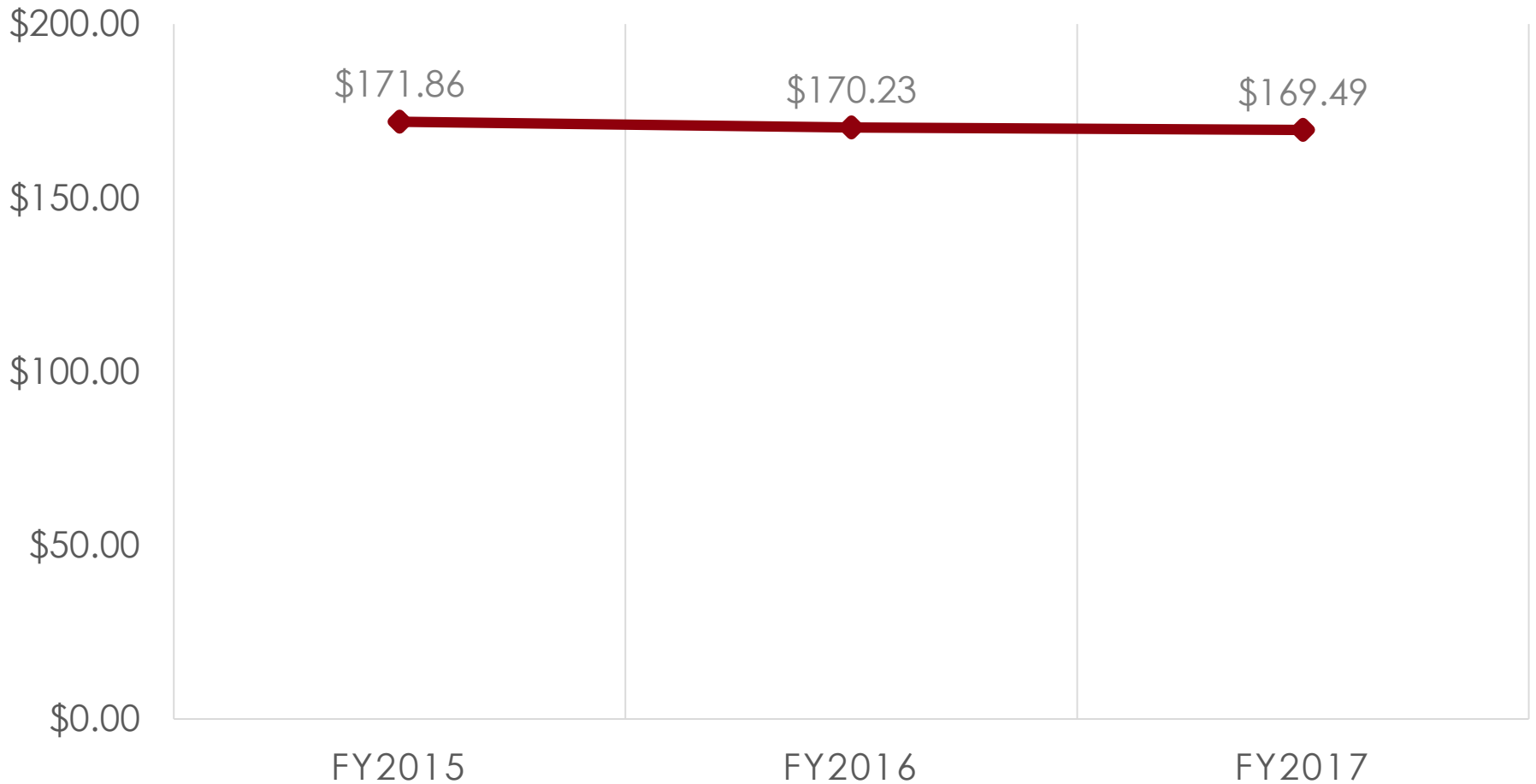


On-Island – Tracking

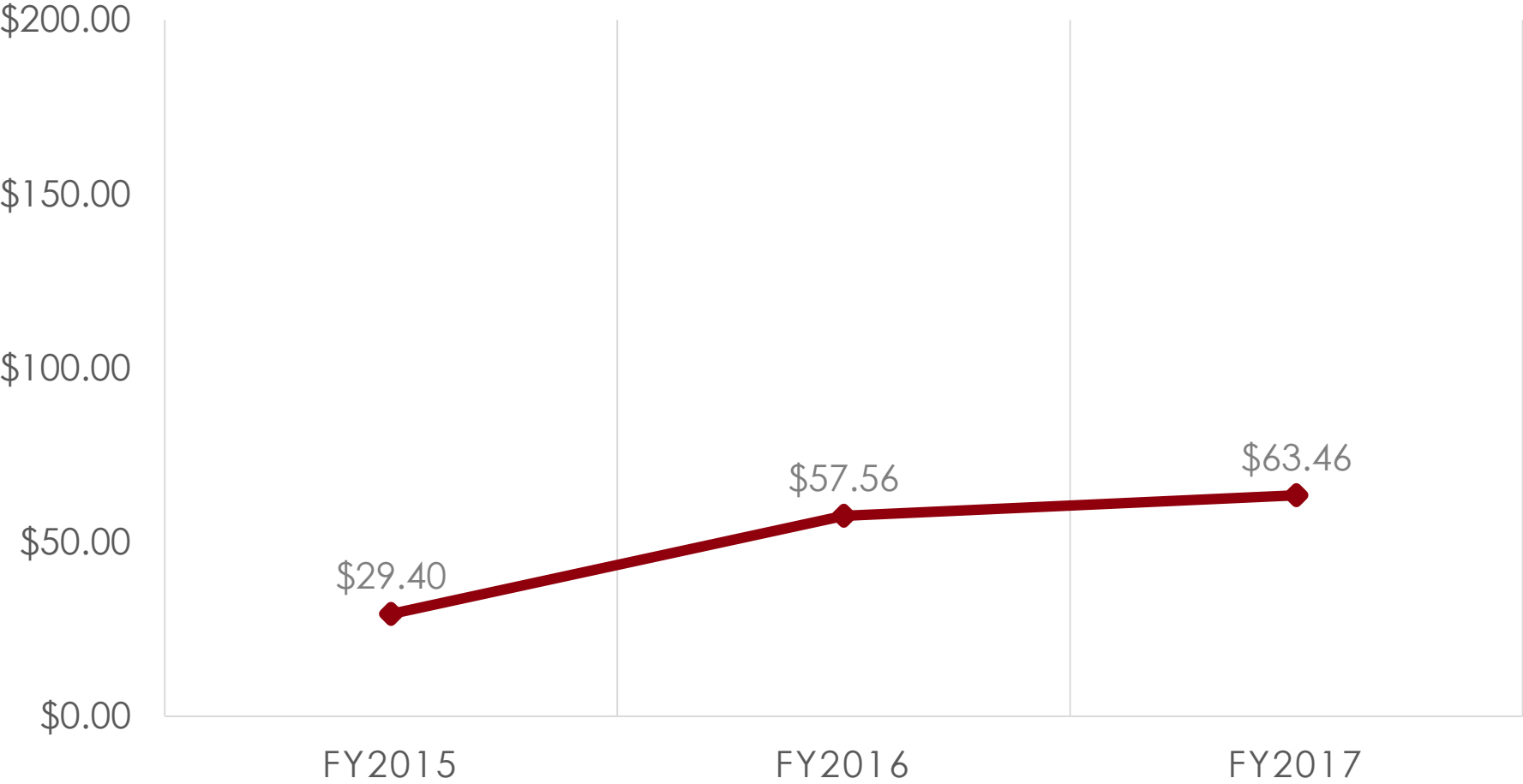
Gift/ Souvenir – Self/ Companion



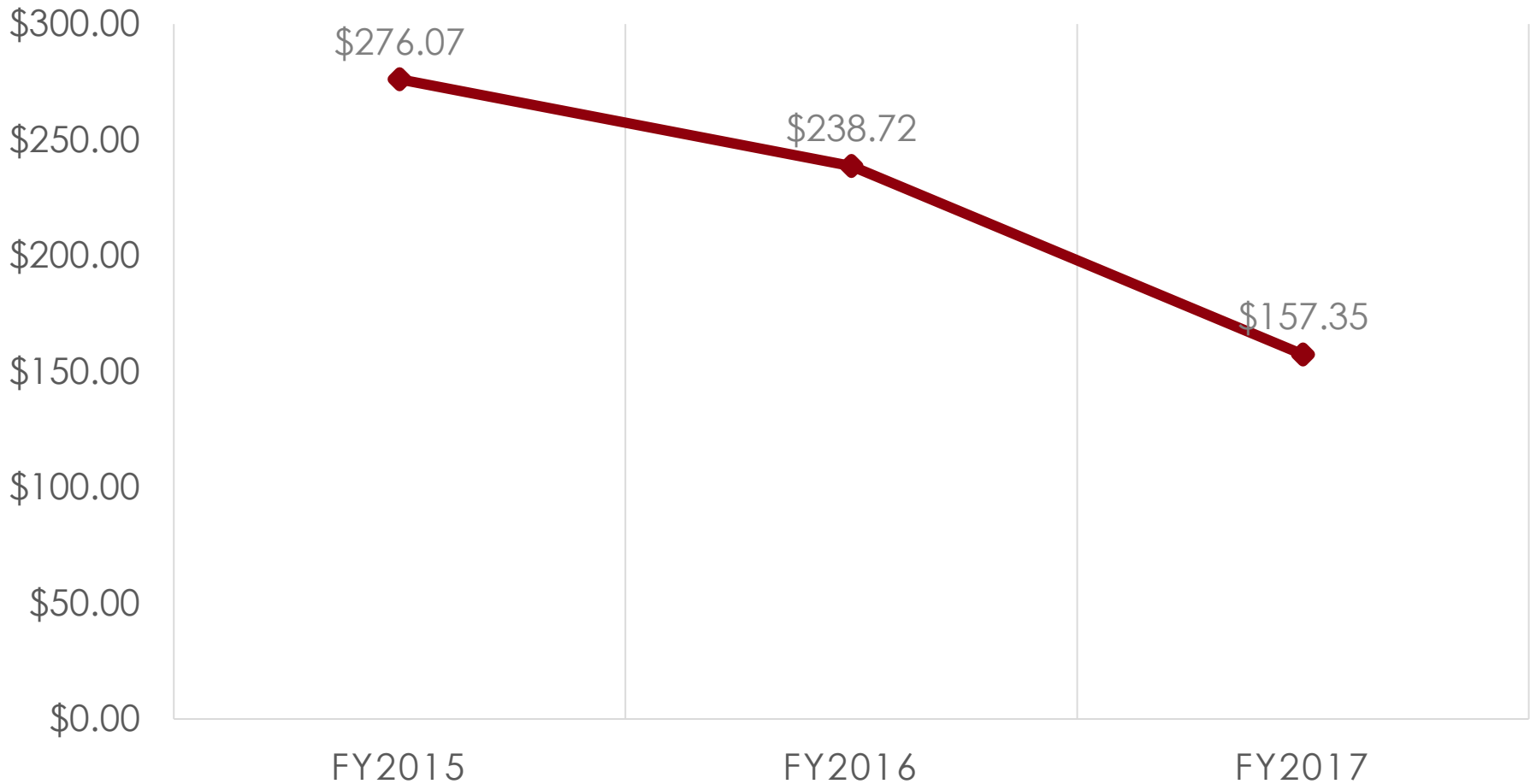
On-Island – Tracking Gift/ Souvenir – Friends/ Family



On-Island – Tracking Local Transportation



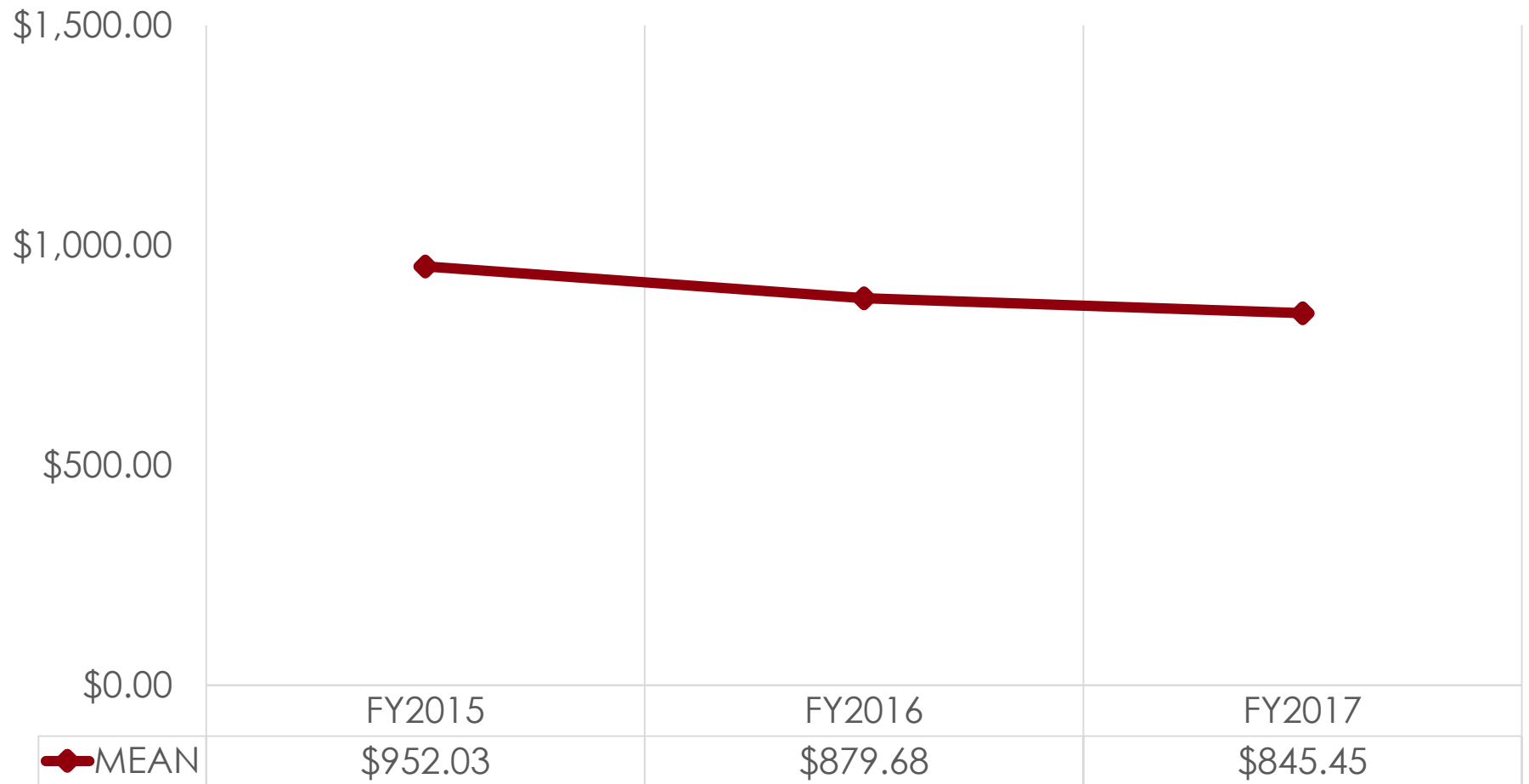
On-Island – Tracking Other Not Included



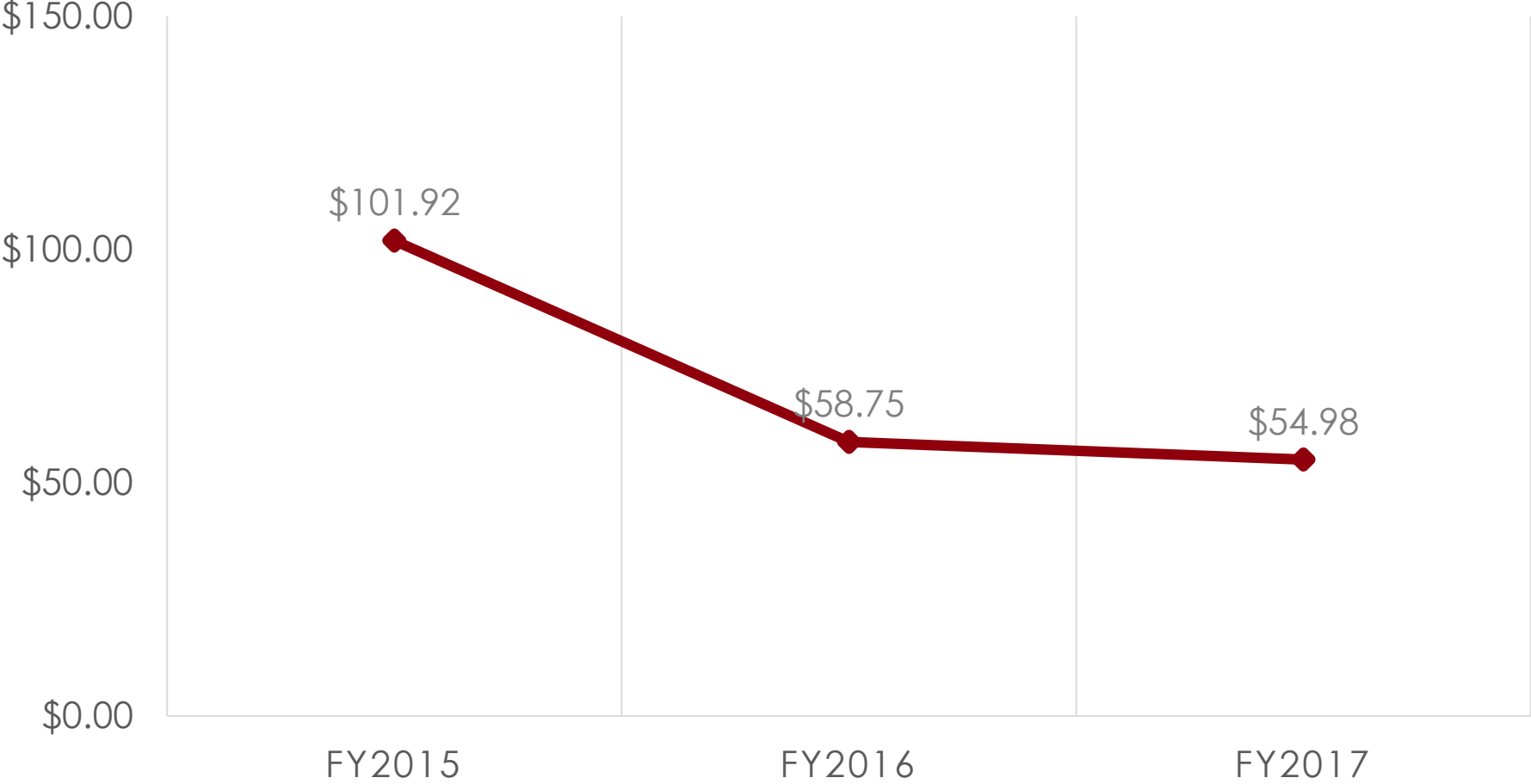
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$845.45 = overall mean average prepaid expense by respondent

TOTAL Per Person Expenditures – Tracking



GUAM AIRPORT EXPENDITURE – Tracking

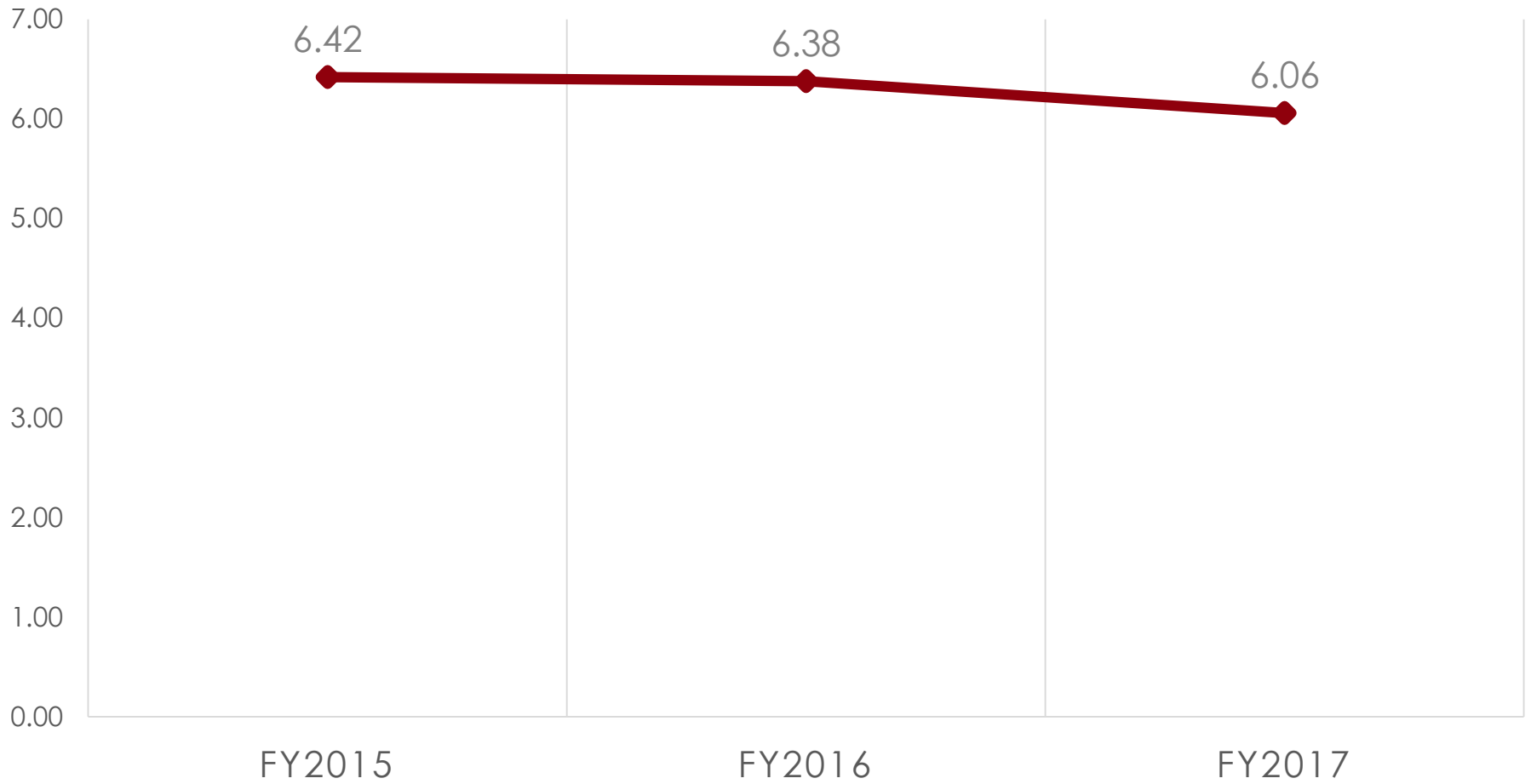


SECTION 4

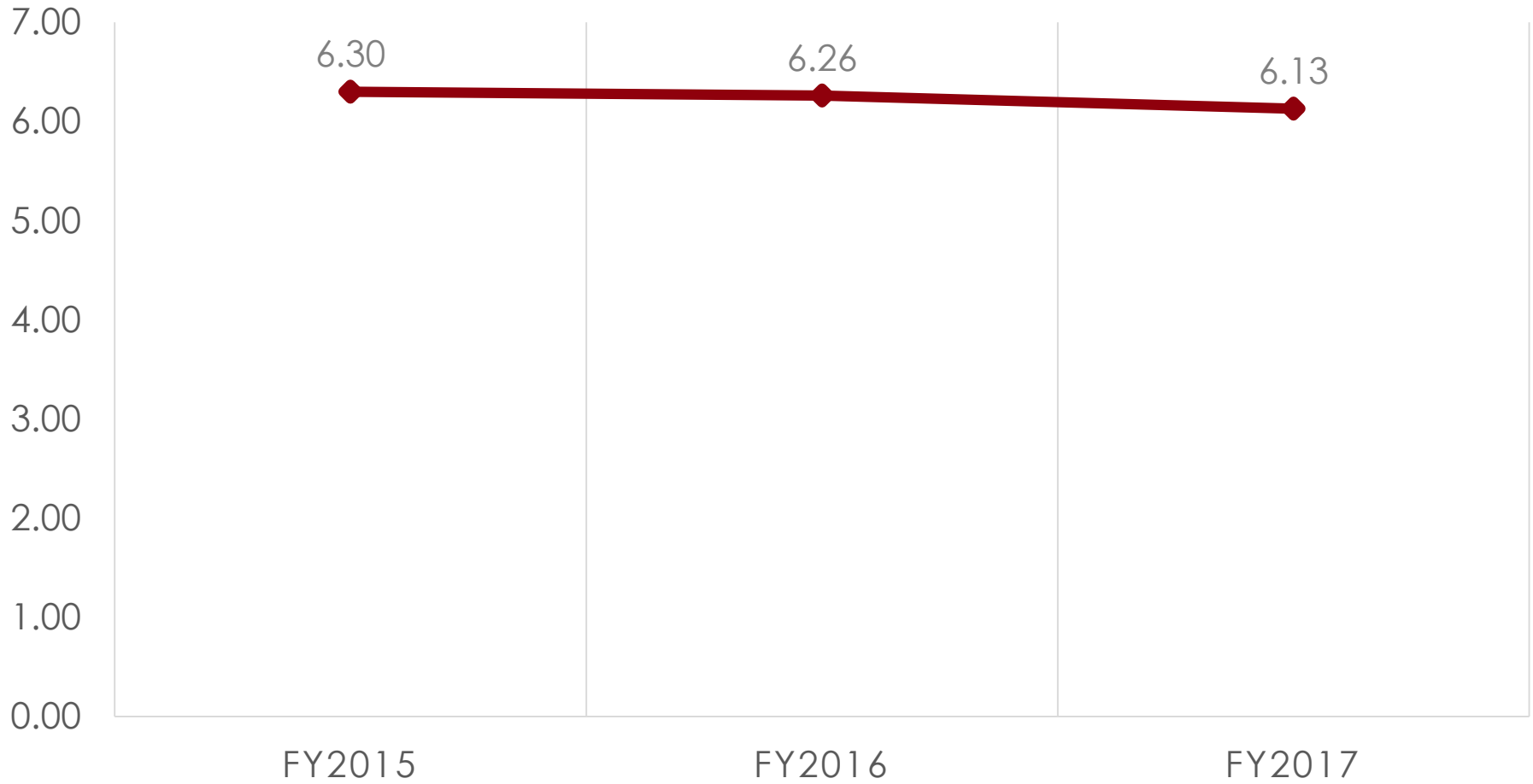
VISITOR SATISFACTION

BEHAVIOR

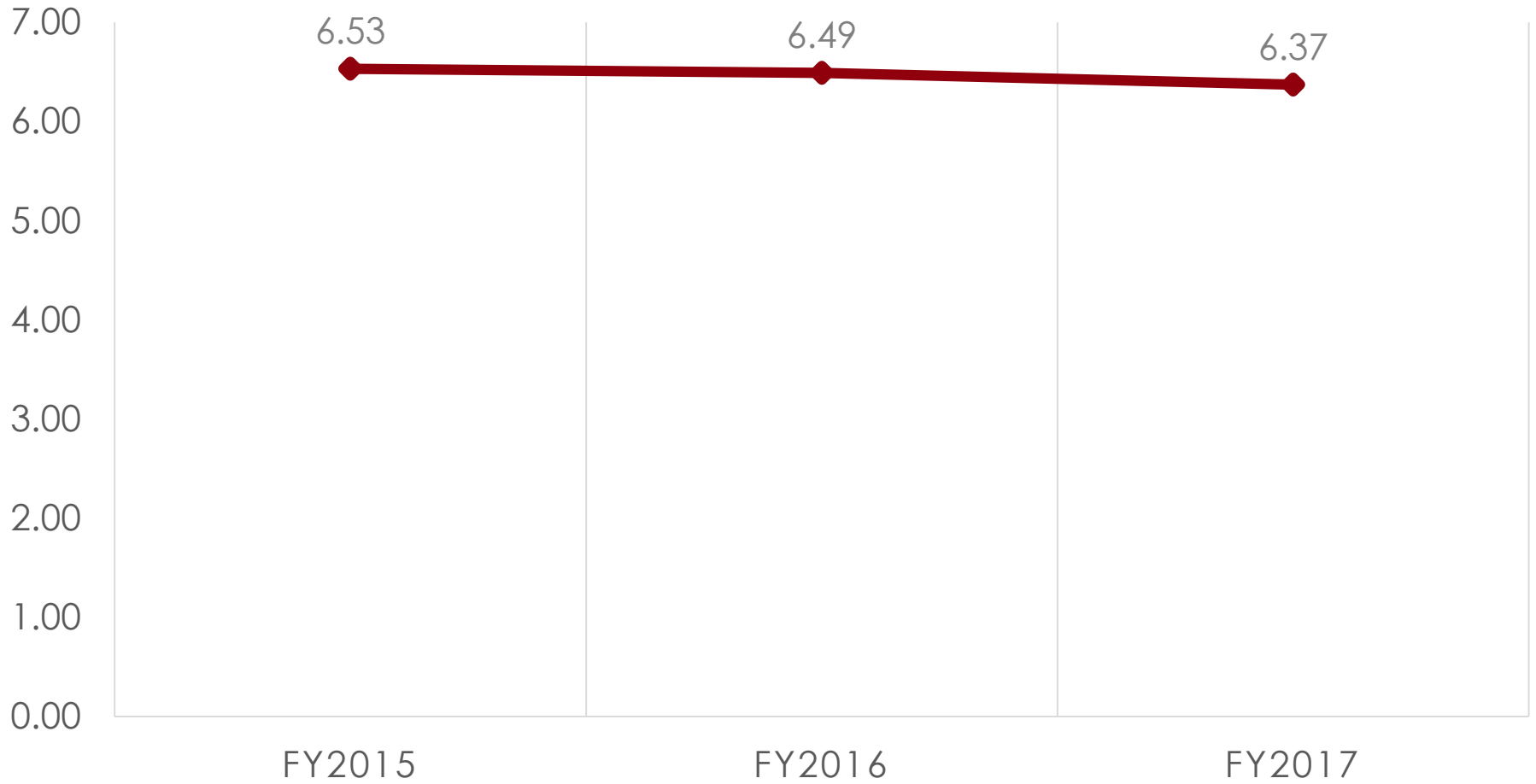
OVERALL SATISFACTION



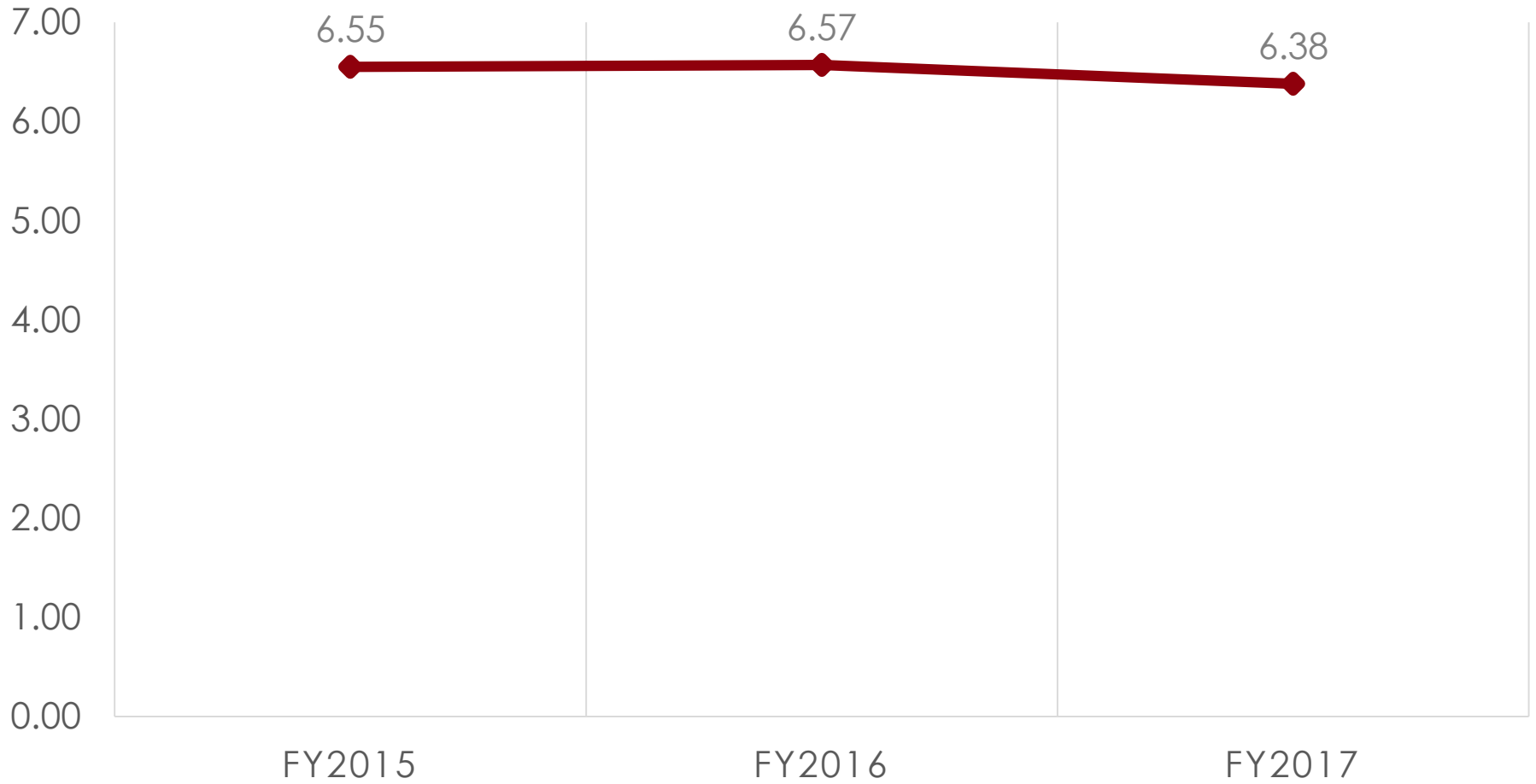
Guam was better than expected



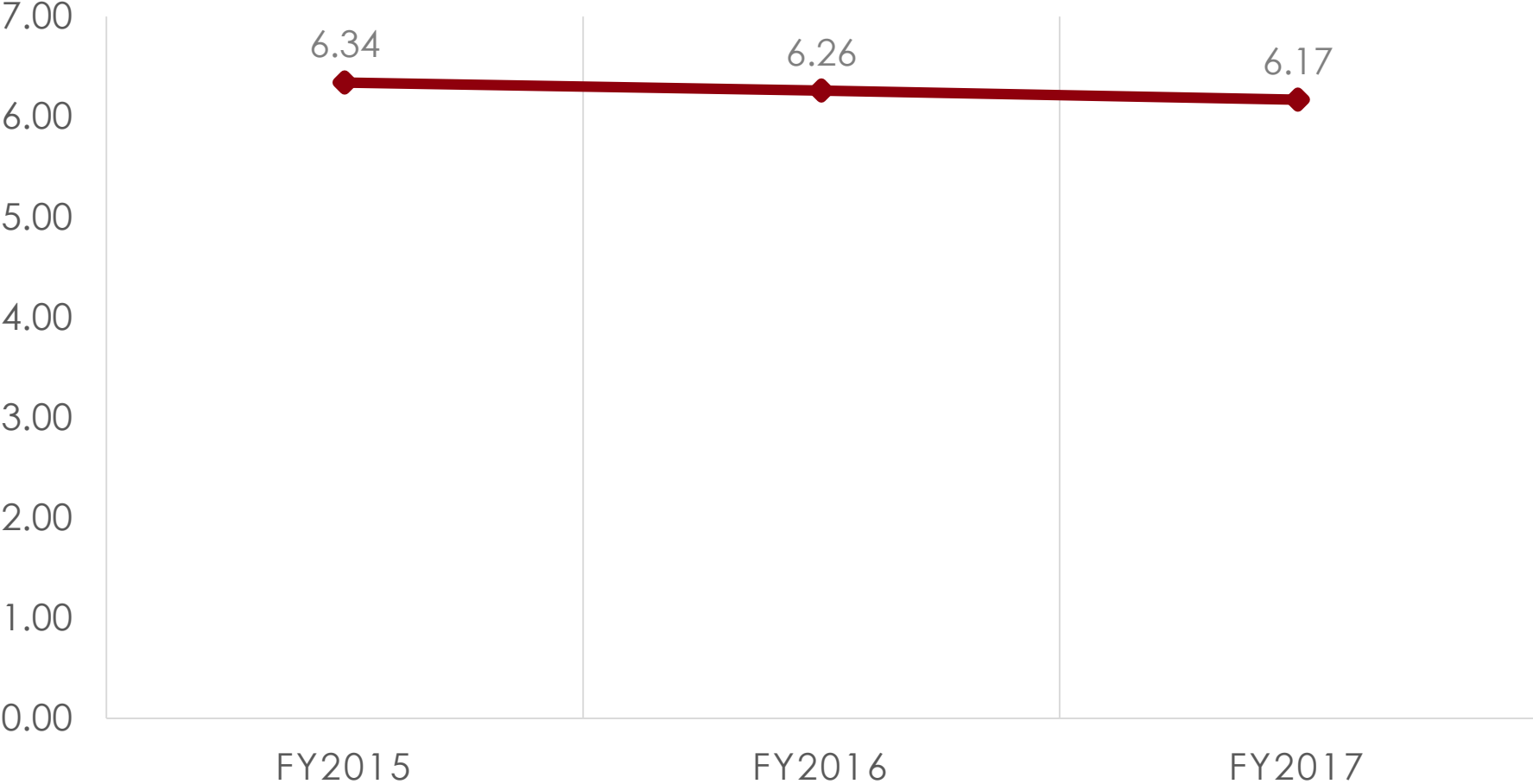
I had no communication problems



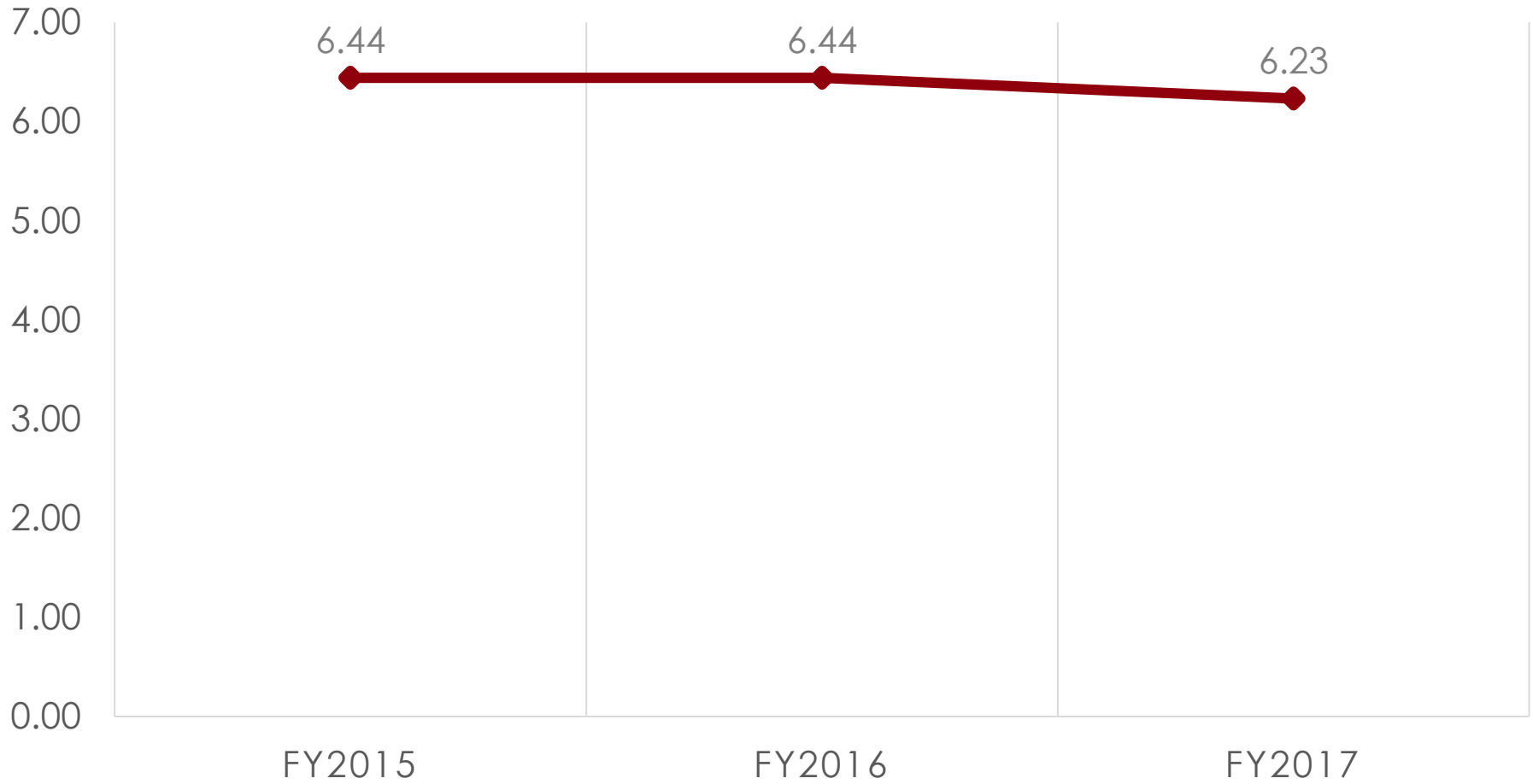
I will recommend Guam to friends



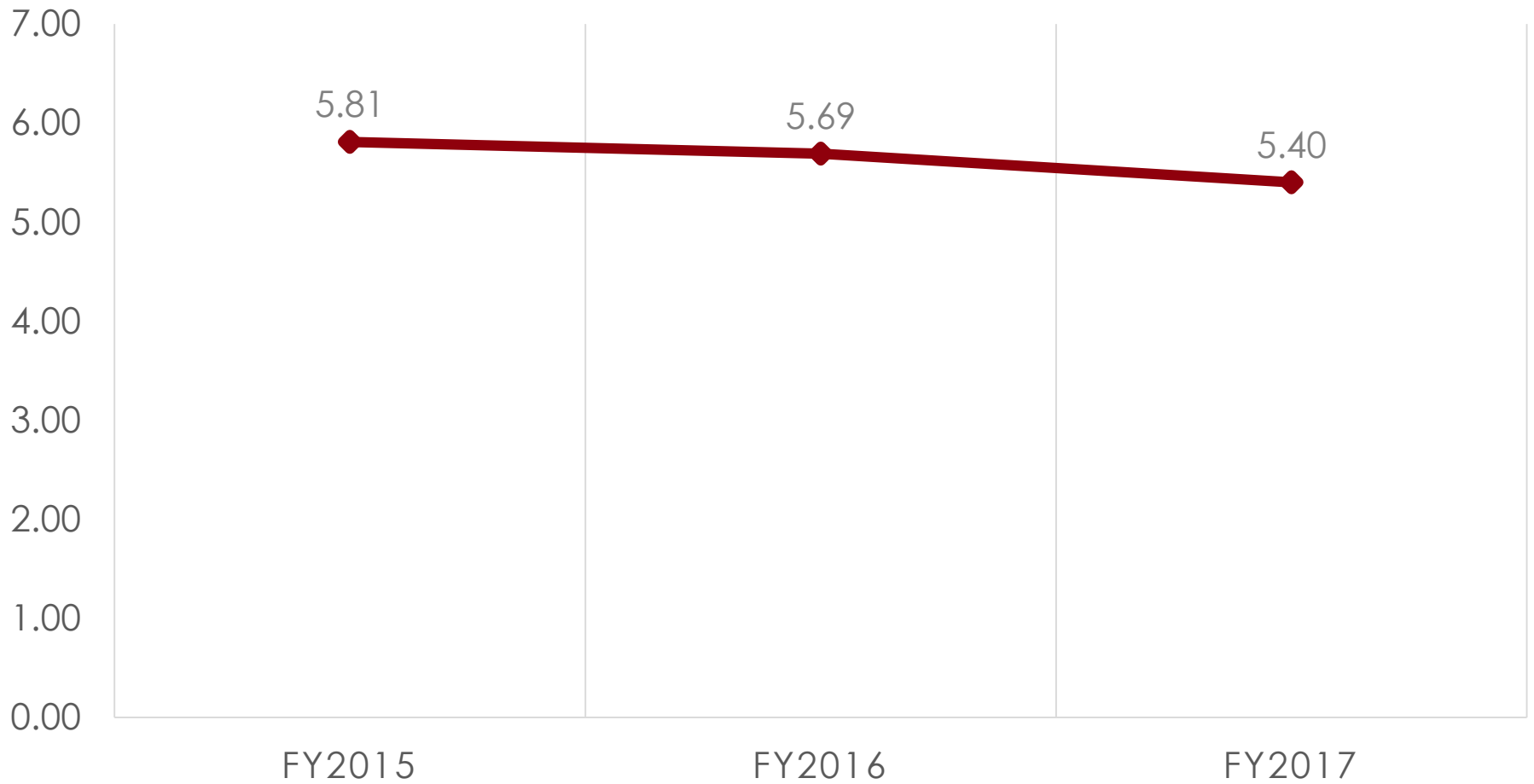
Sites on Guam were attractive



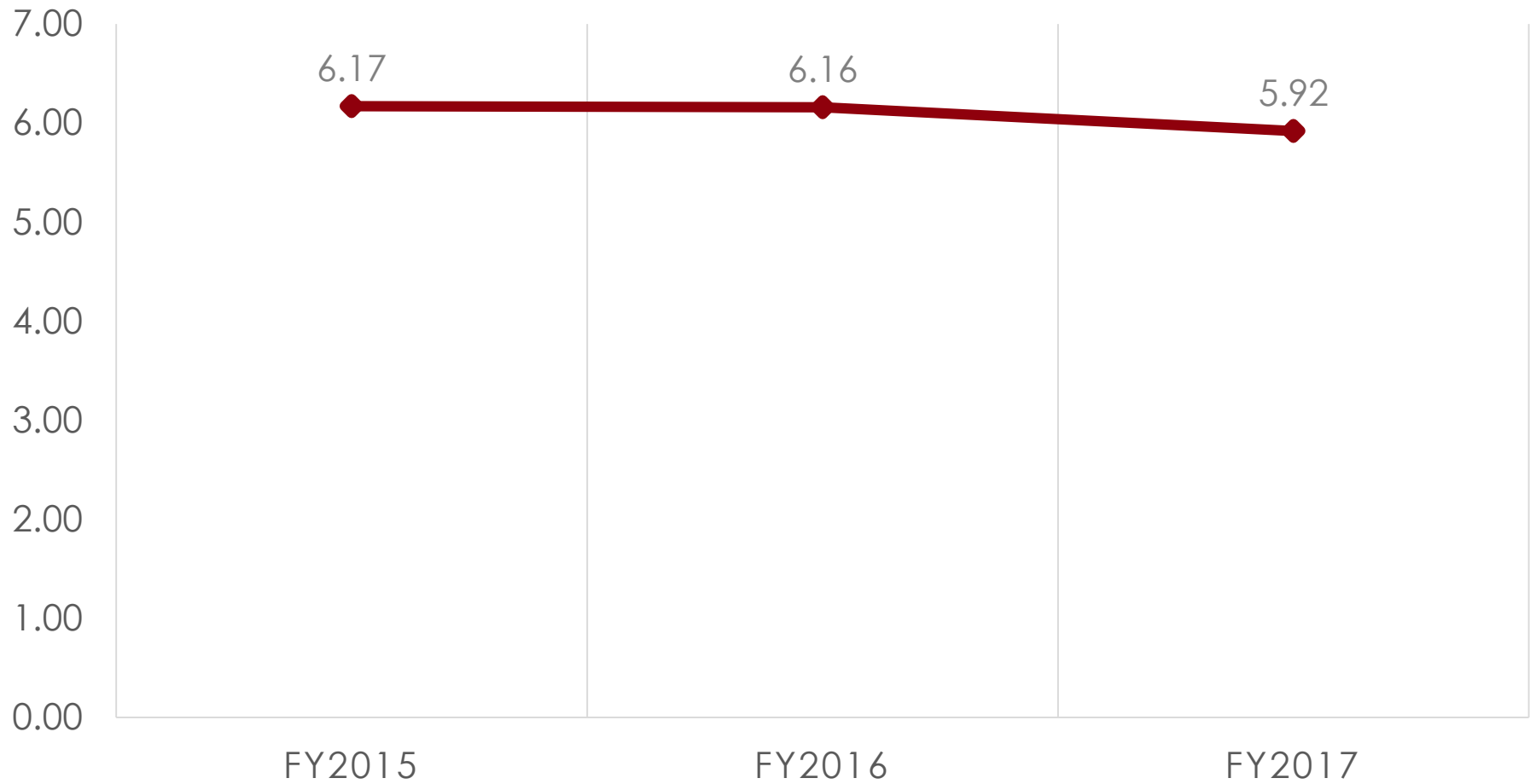
I plan to visit Guam again



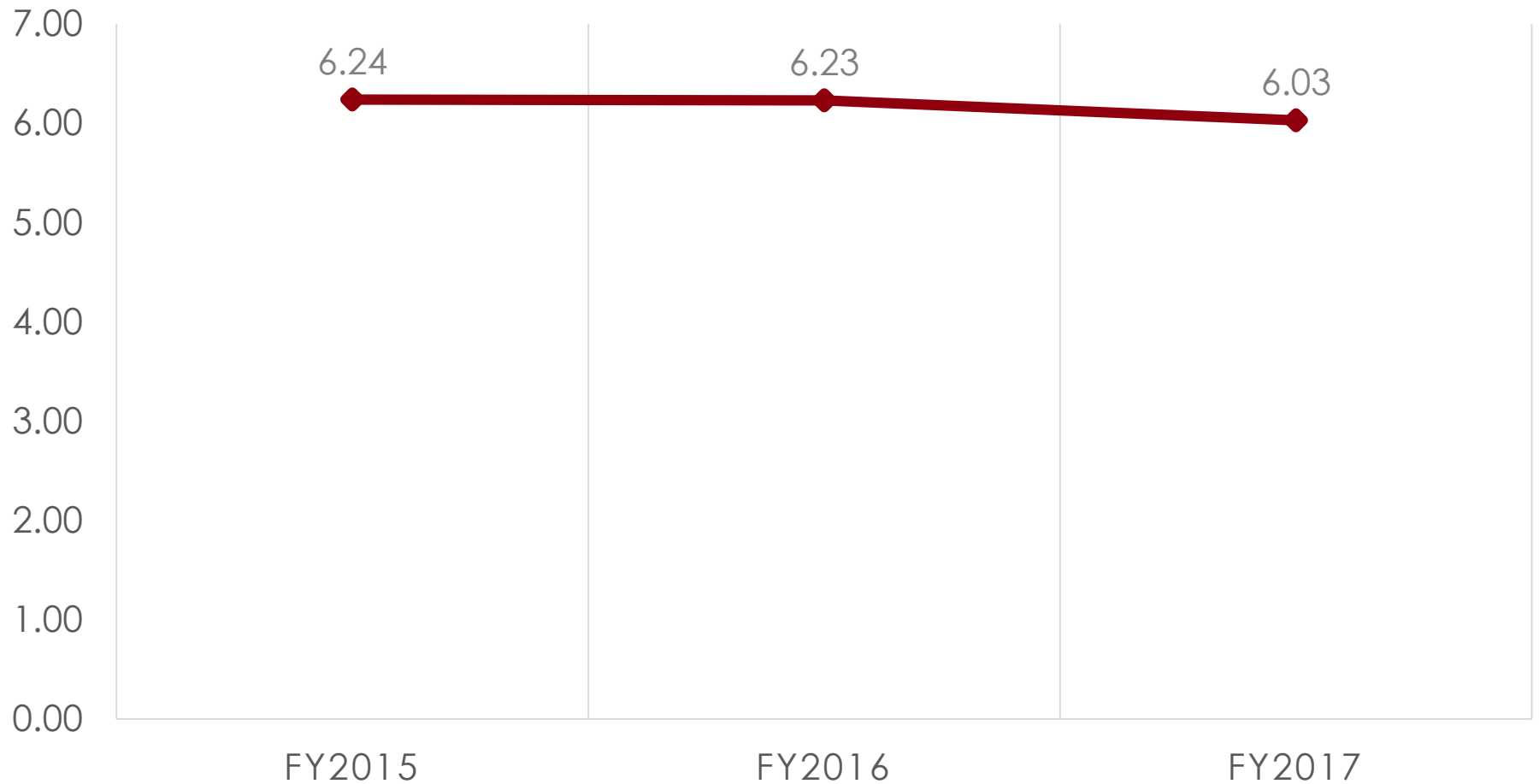
Not enough night time activities



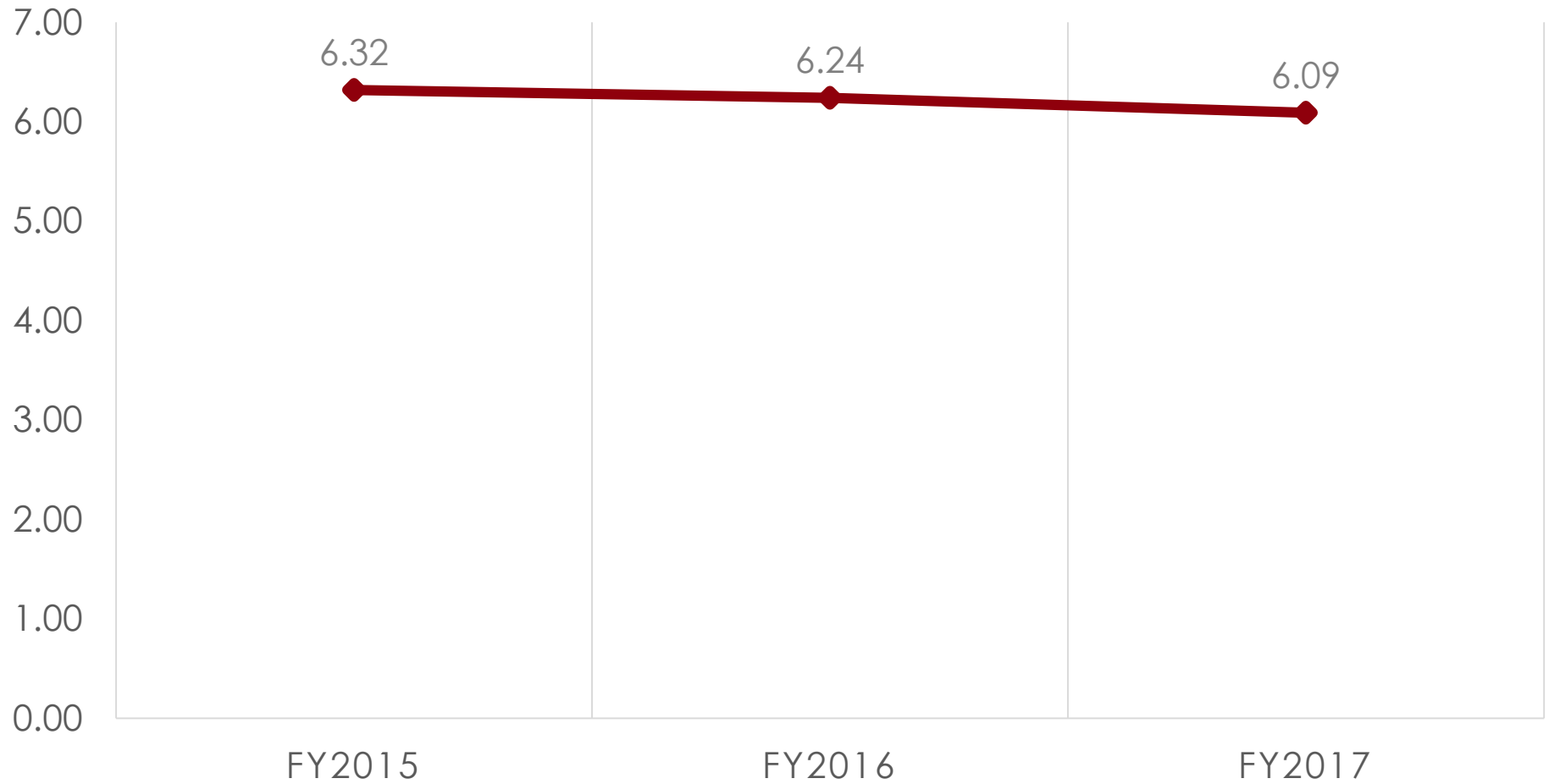
Tour guides were professional



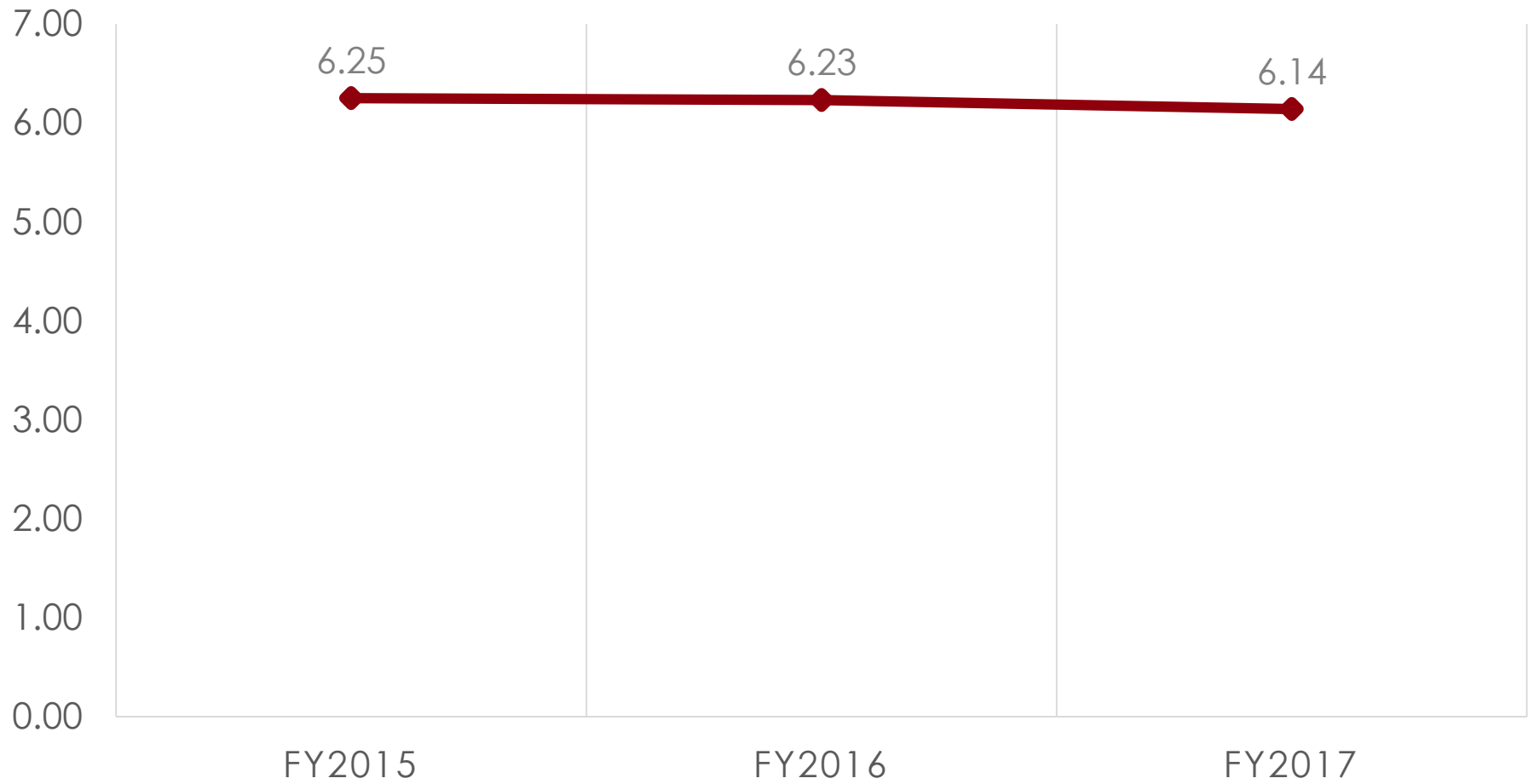
Tour drivers were professional



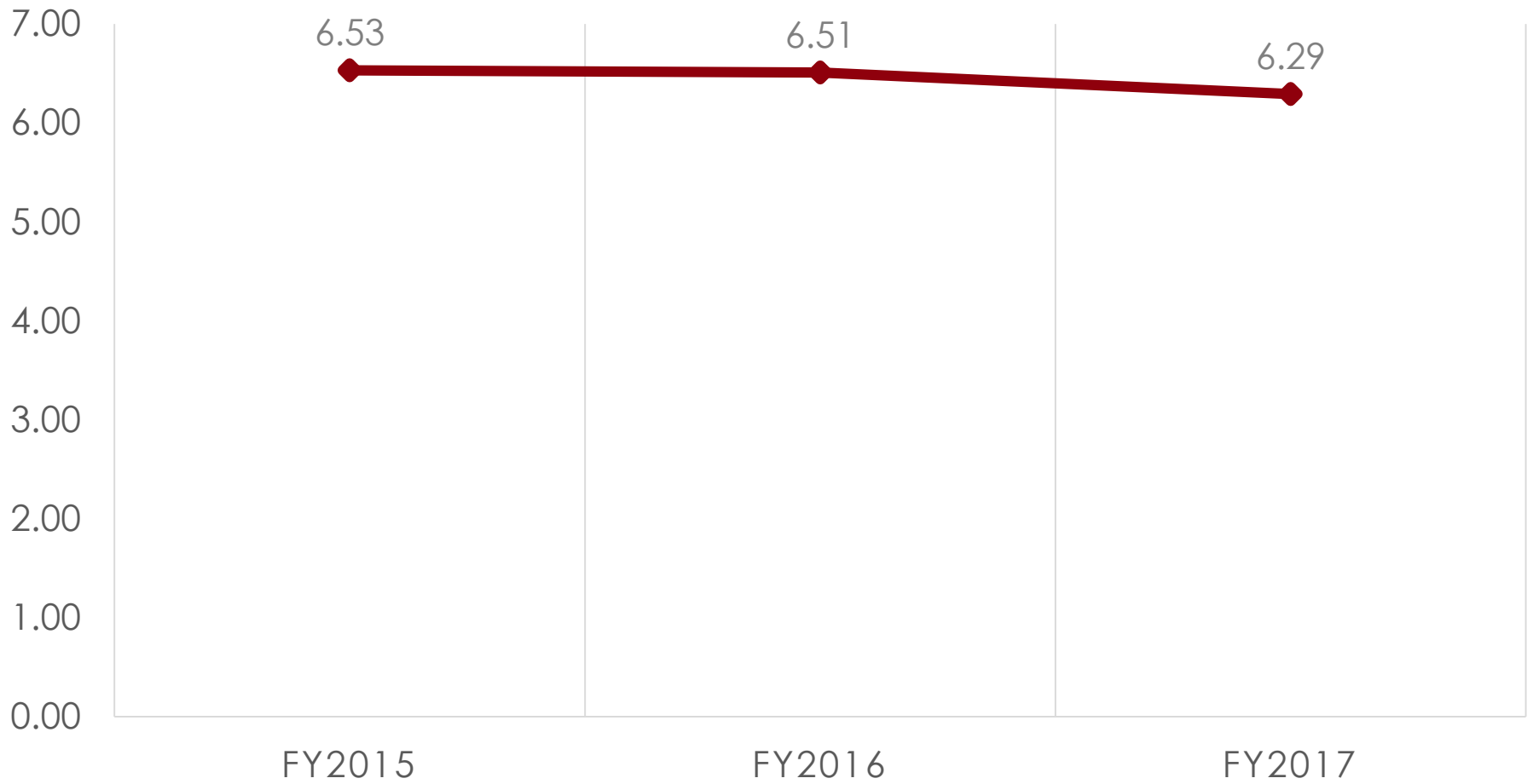
Taxi drivers were professional



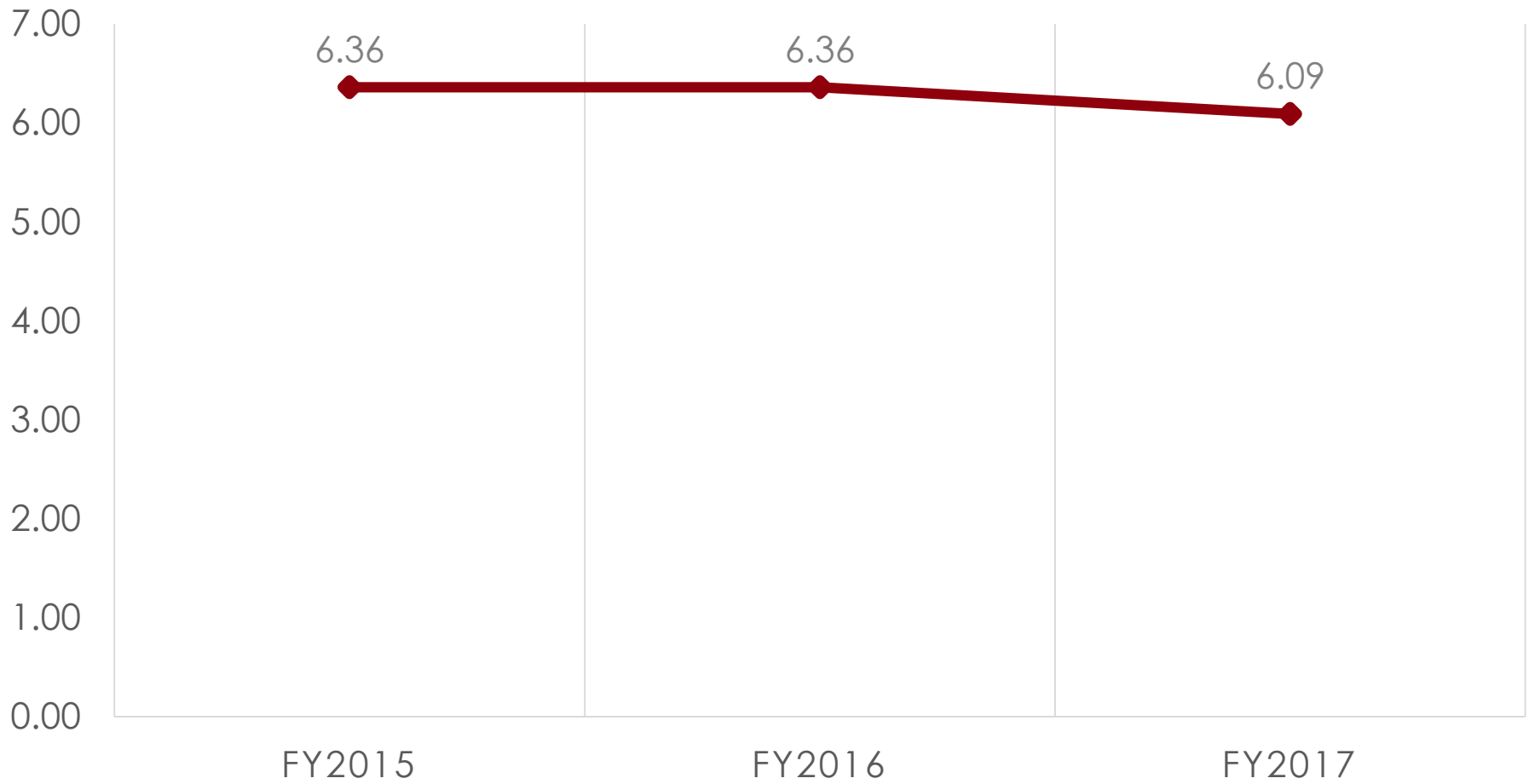
Taxis were clean



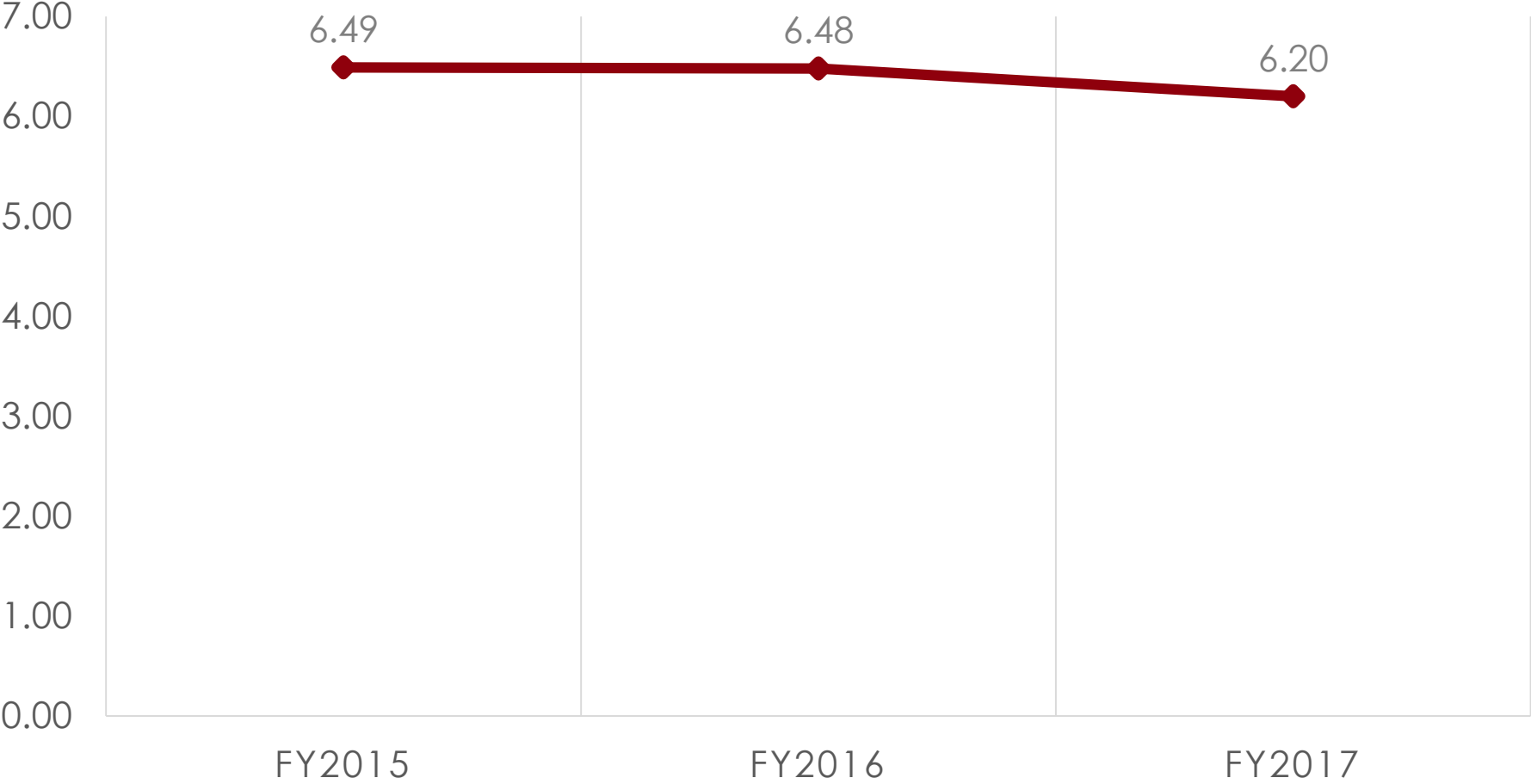
Guam airport was clean



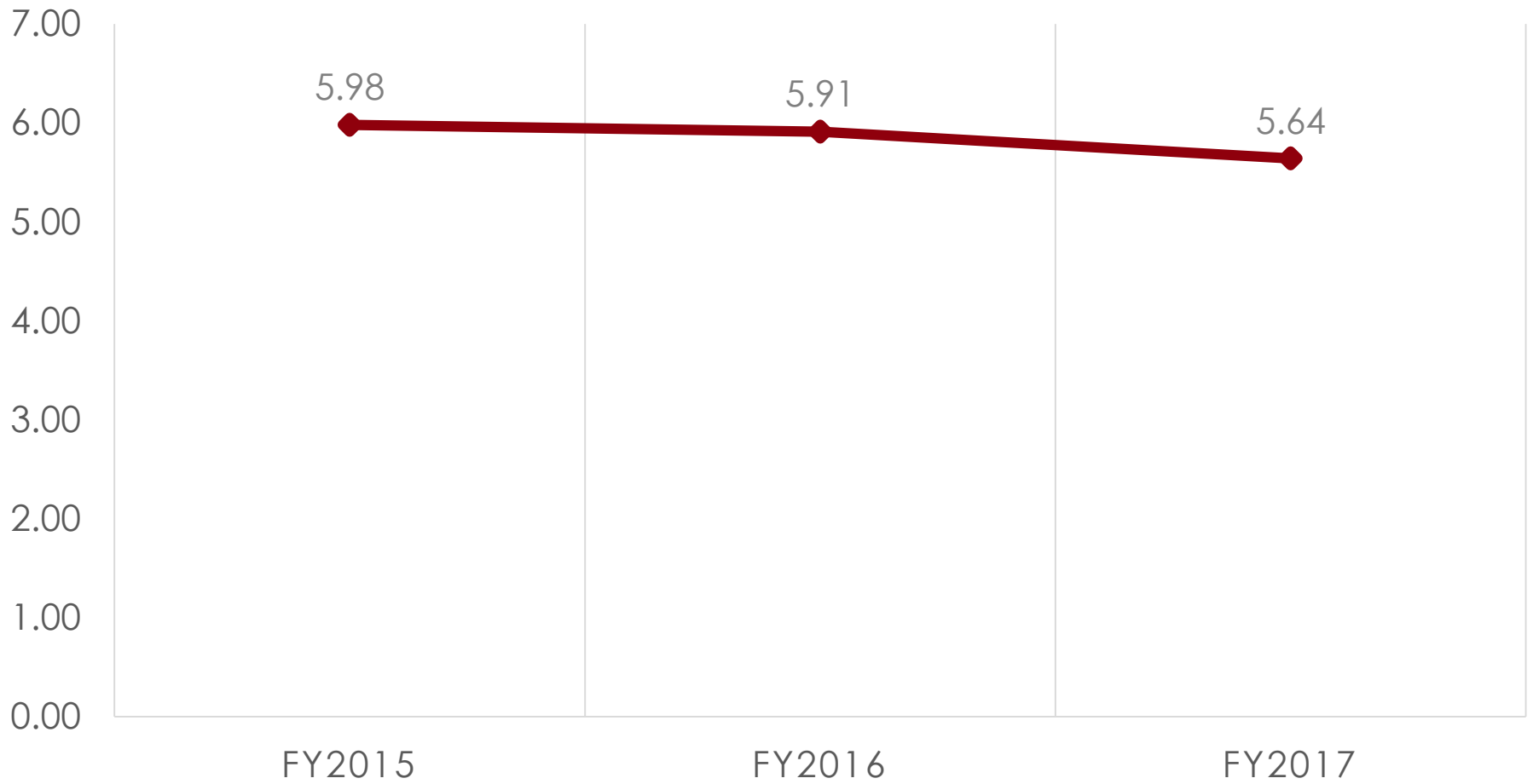
Ease of getting around



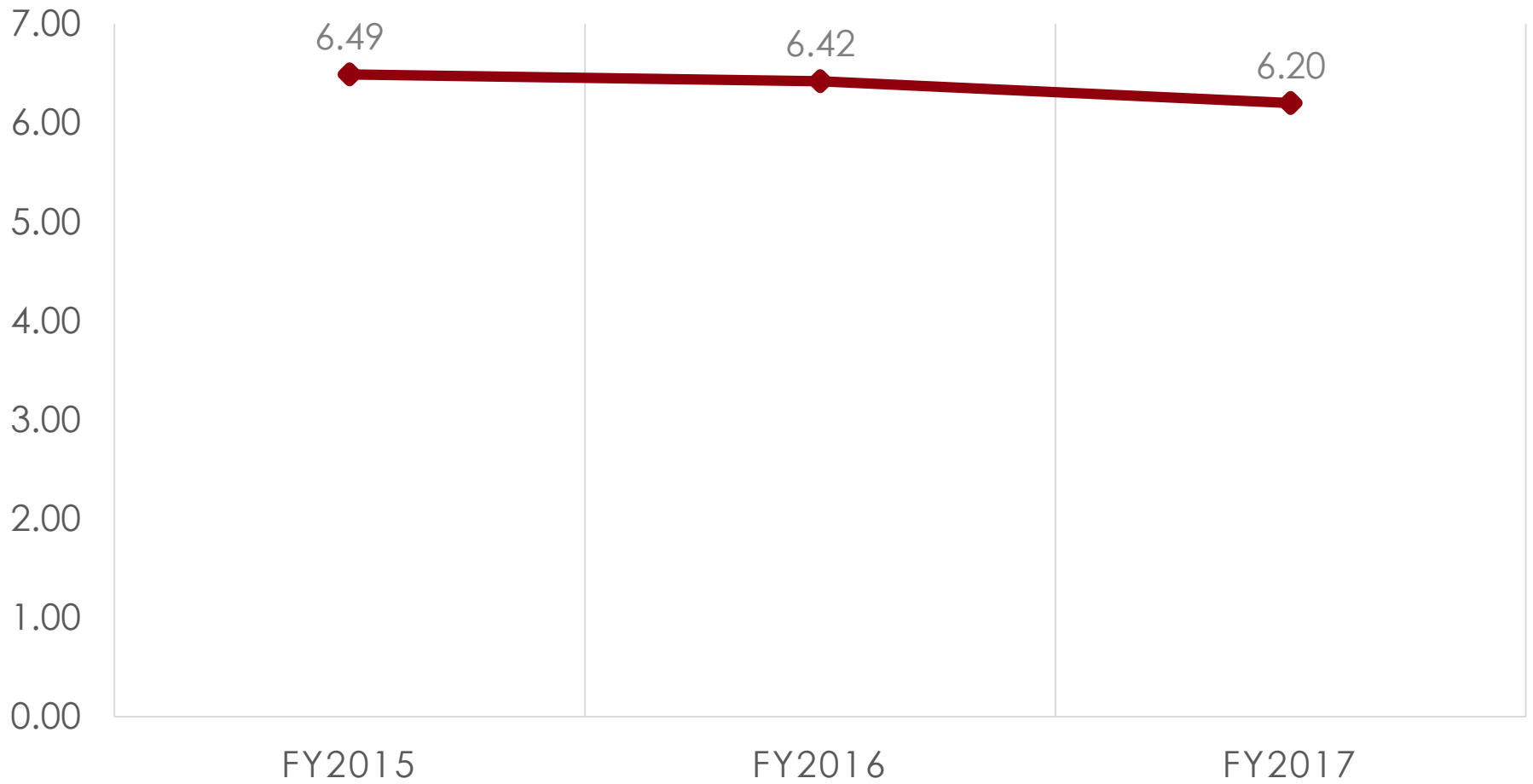
Safety walking around at night



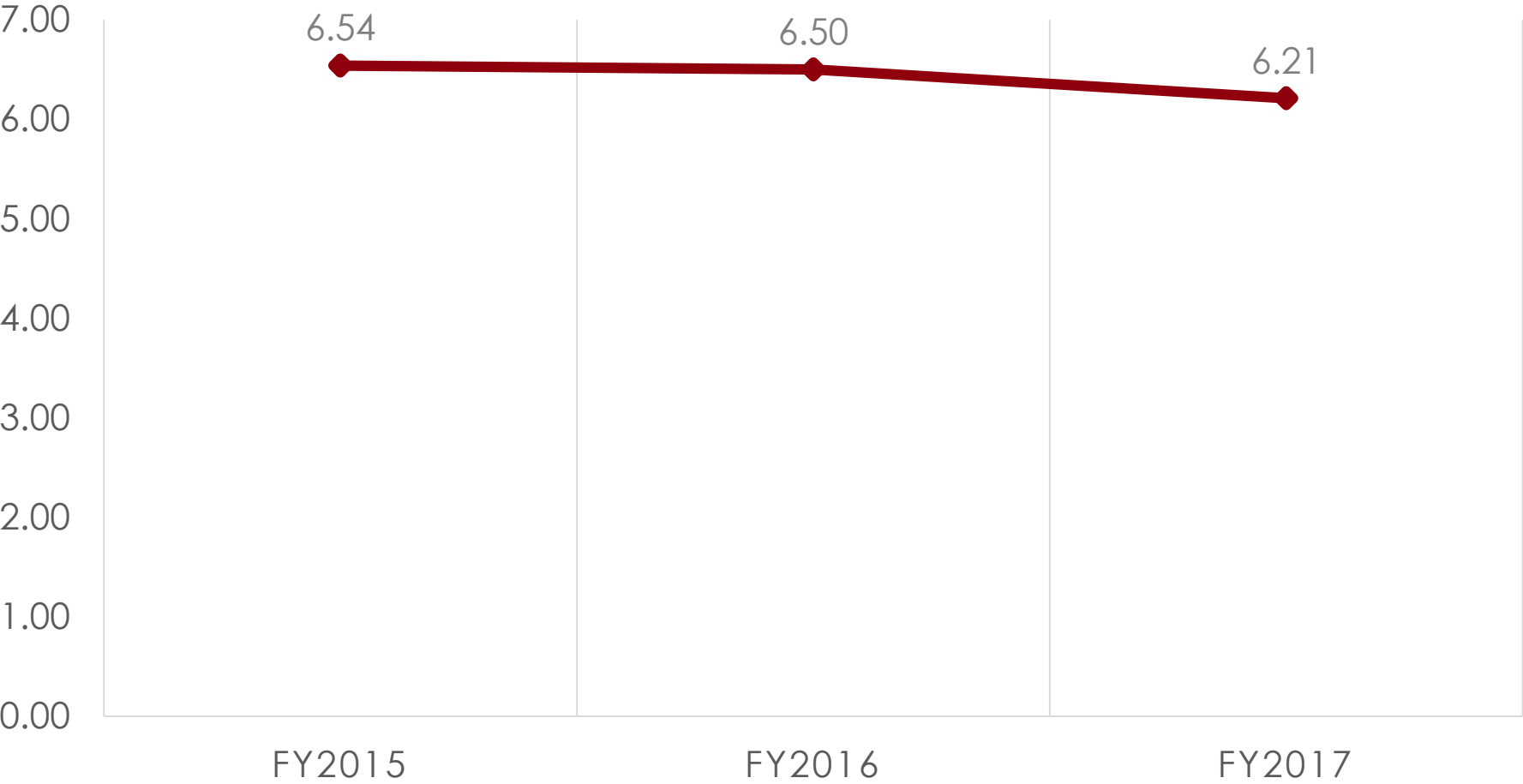
Price of things on Guam



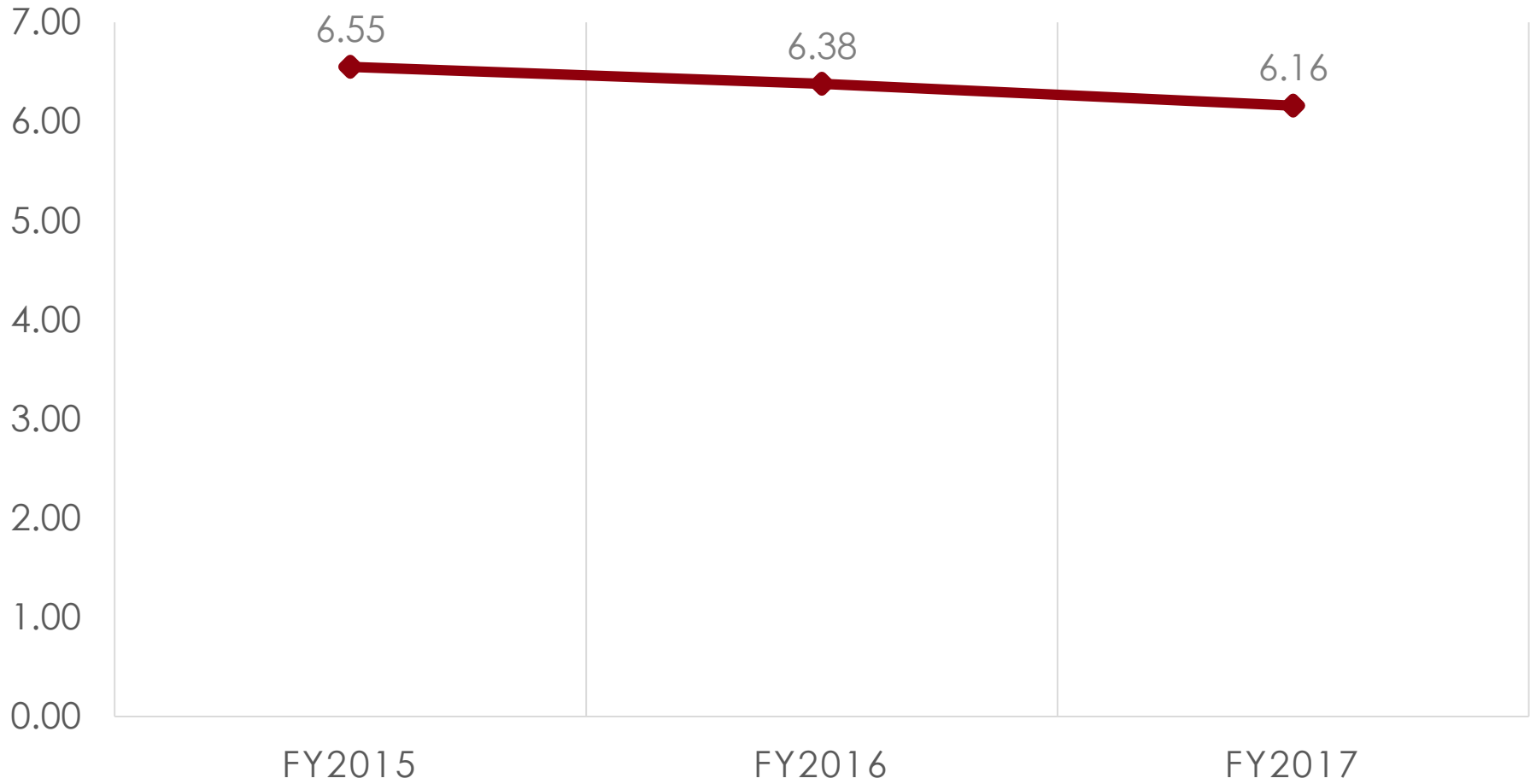
Quality/ Cleanliness- beach, ocean



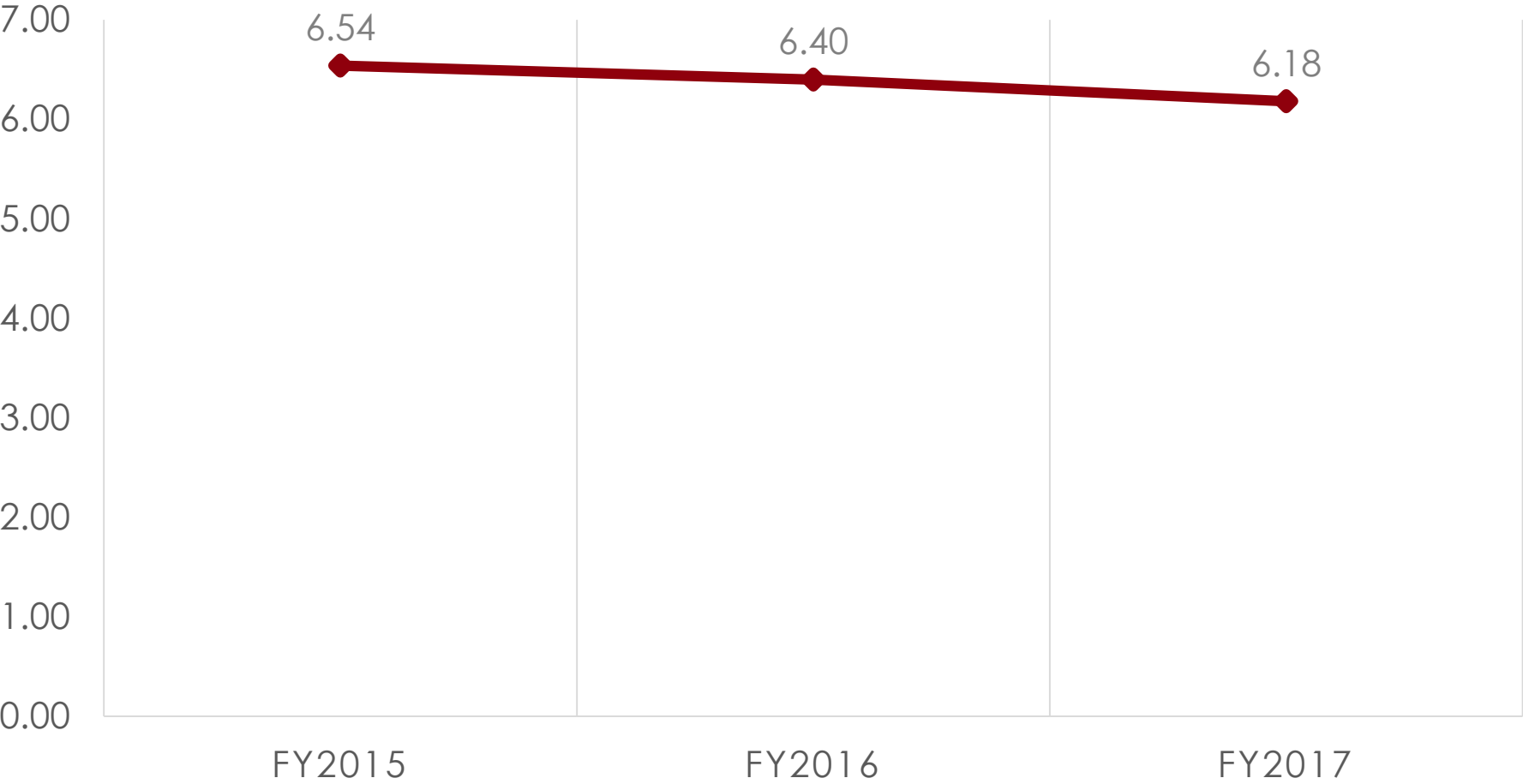
Quality/ Cleanliness- air, sky



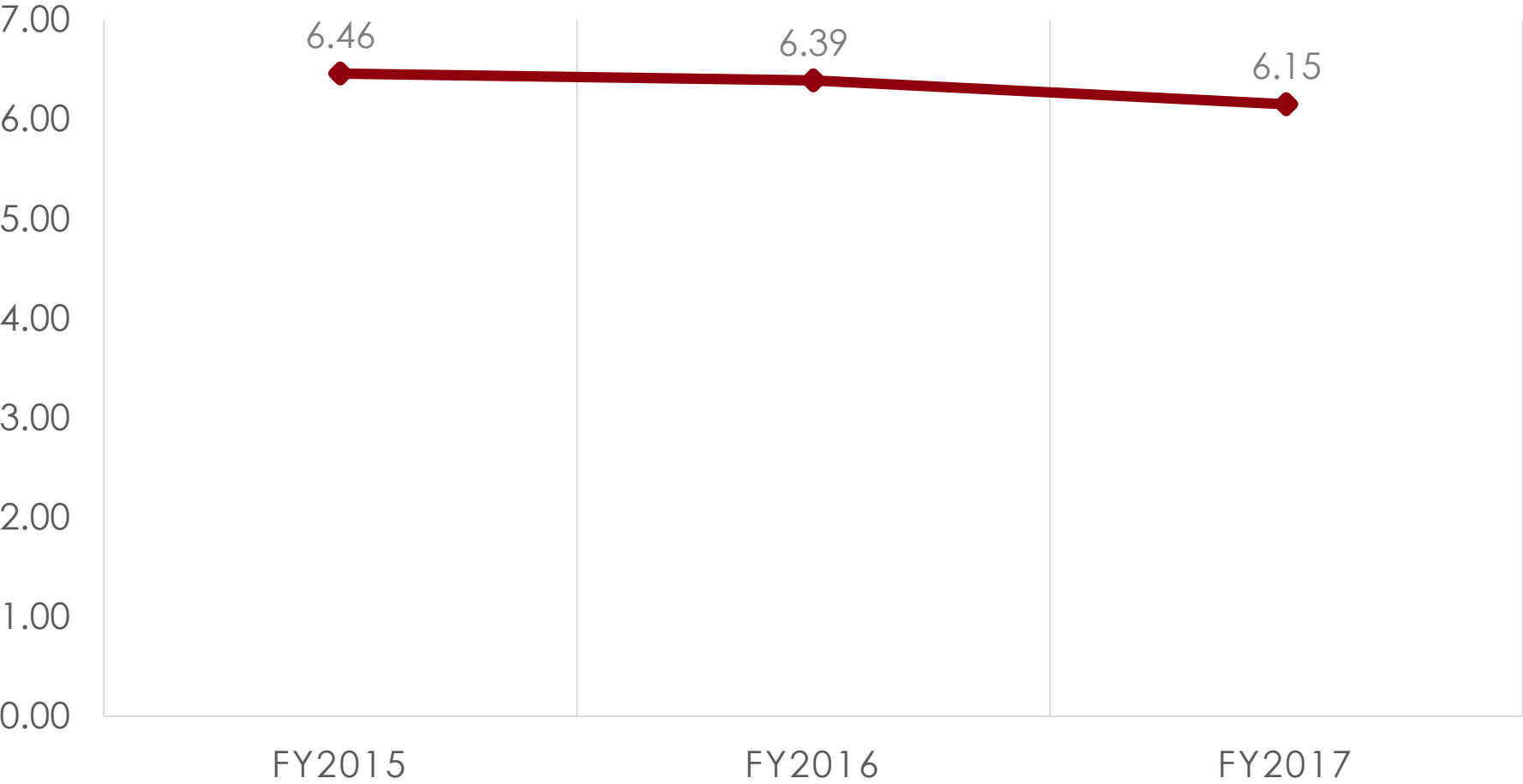
Quality/ Cleanliness- parks



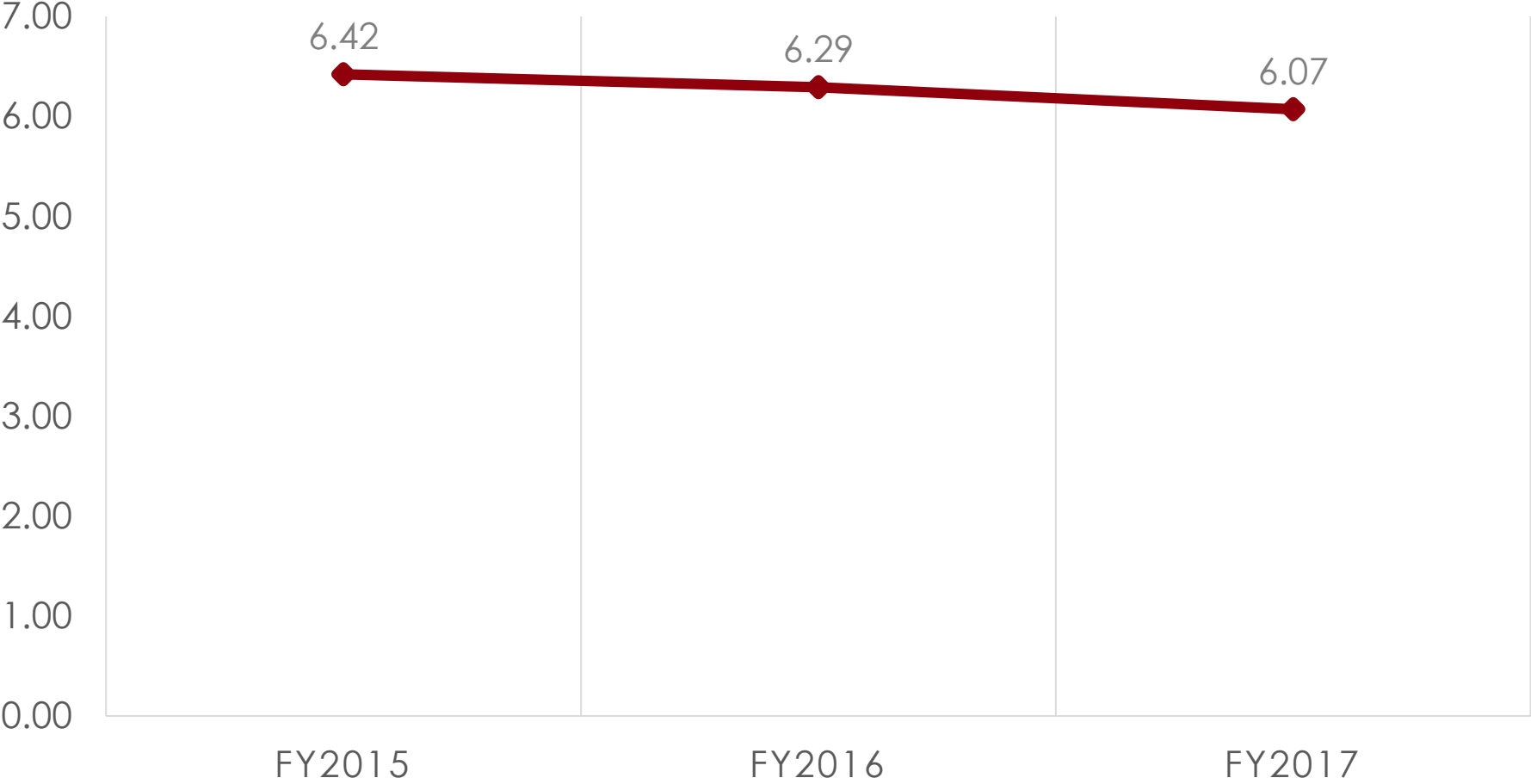
Quality- landscape Tumon



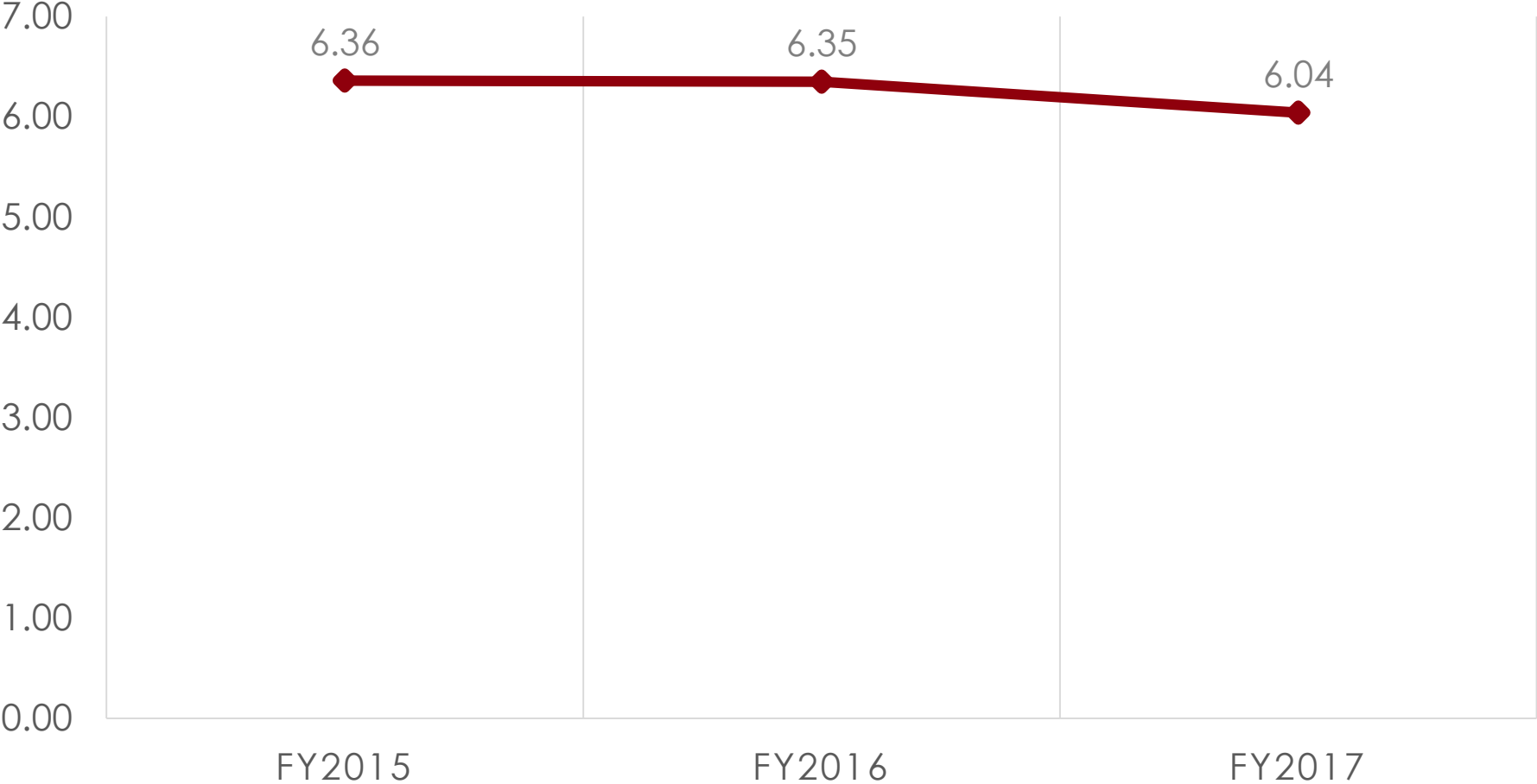
Quality- landscape Guam



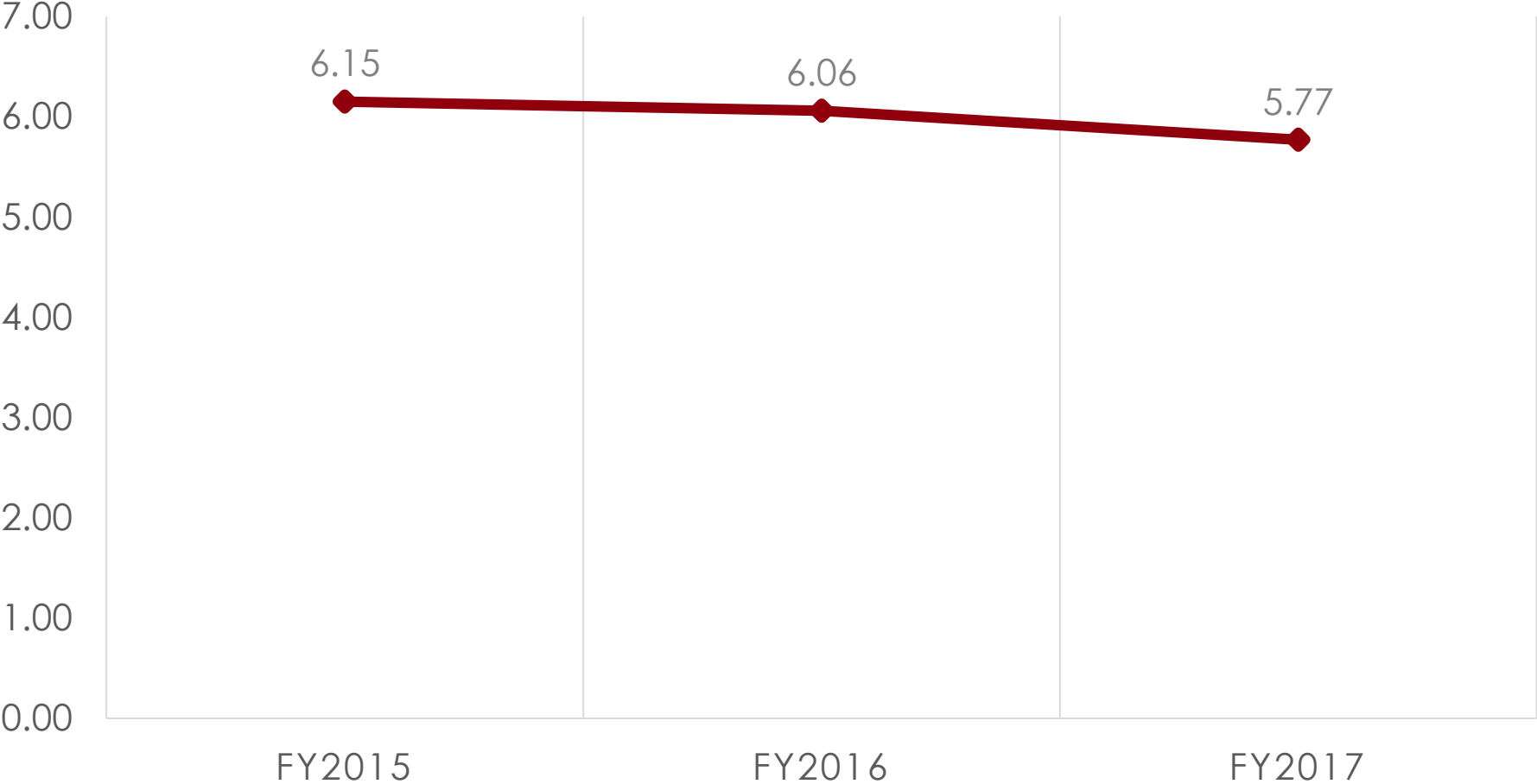
Quality- ground handler



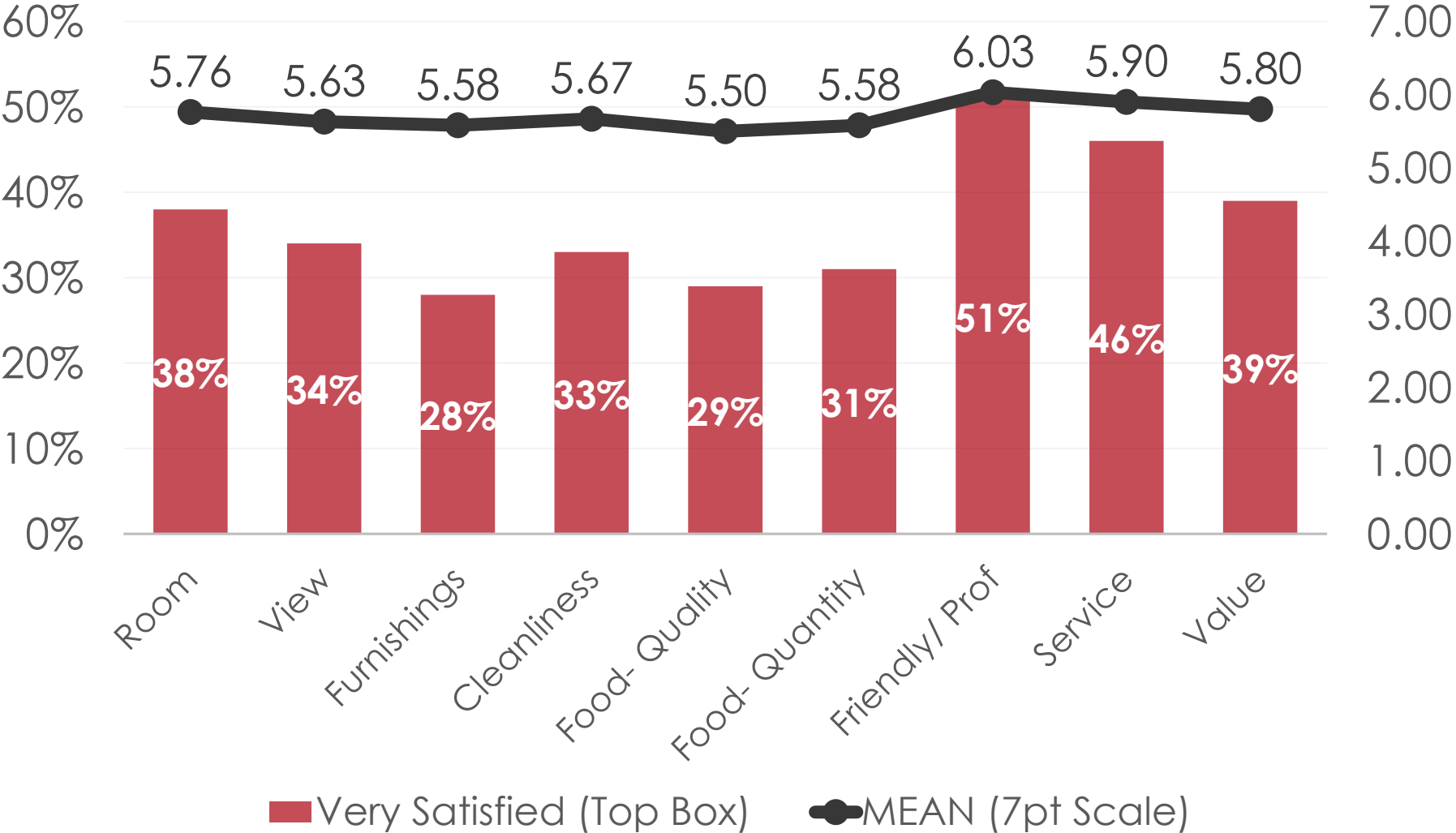
Quality/ Cleanliness- transportation vehicle



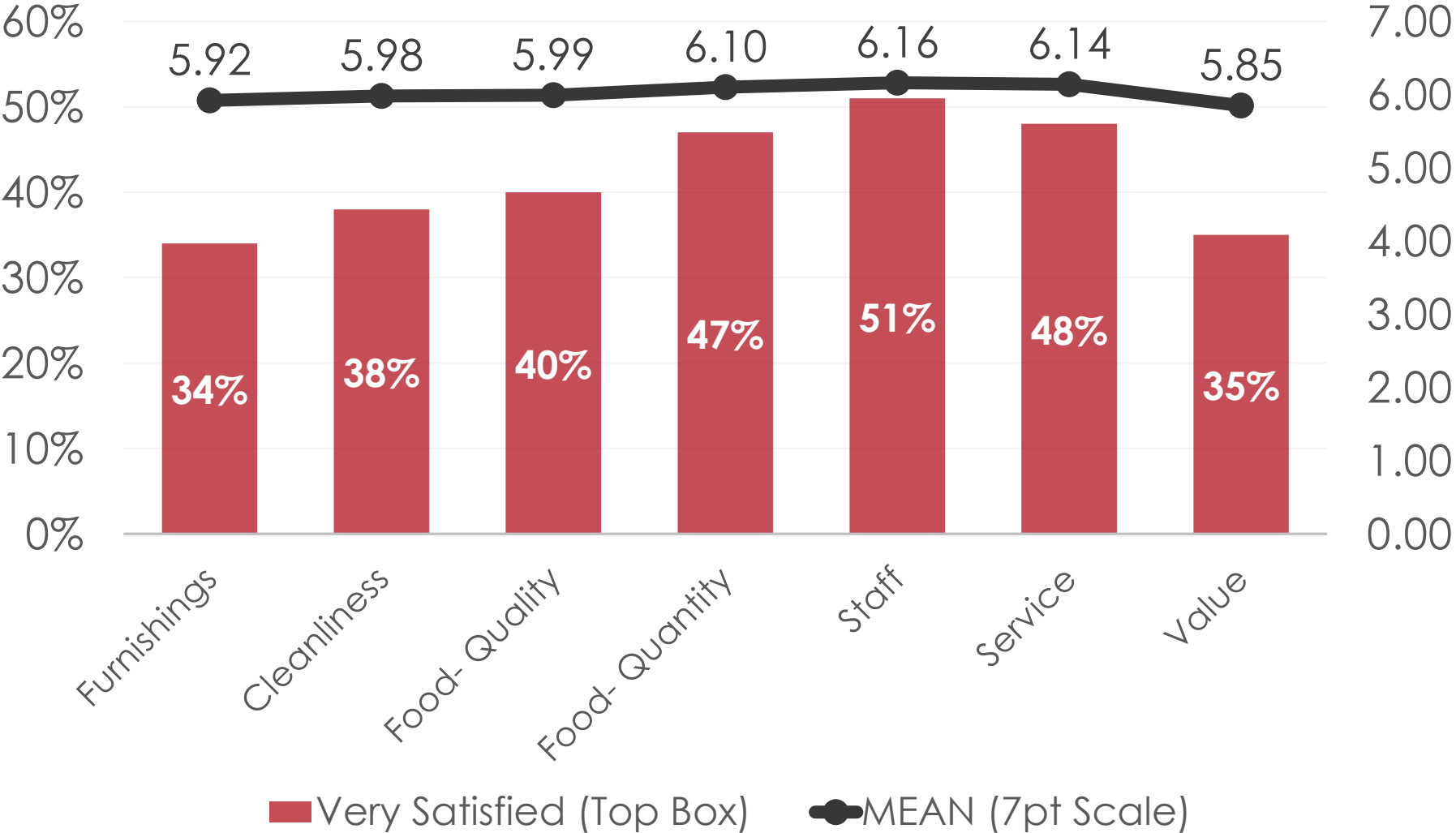
ACCOMMODATIONS OVERALL SATISFACTION



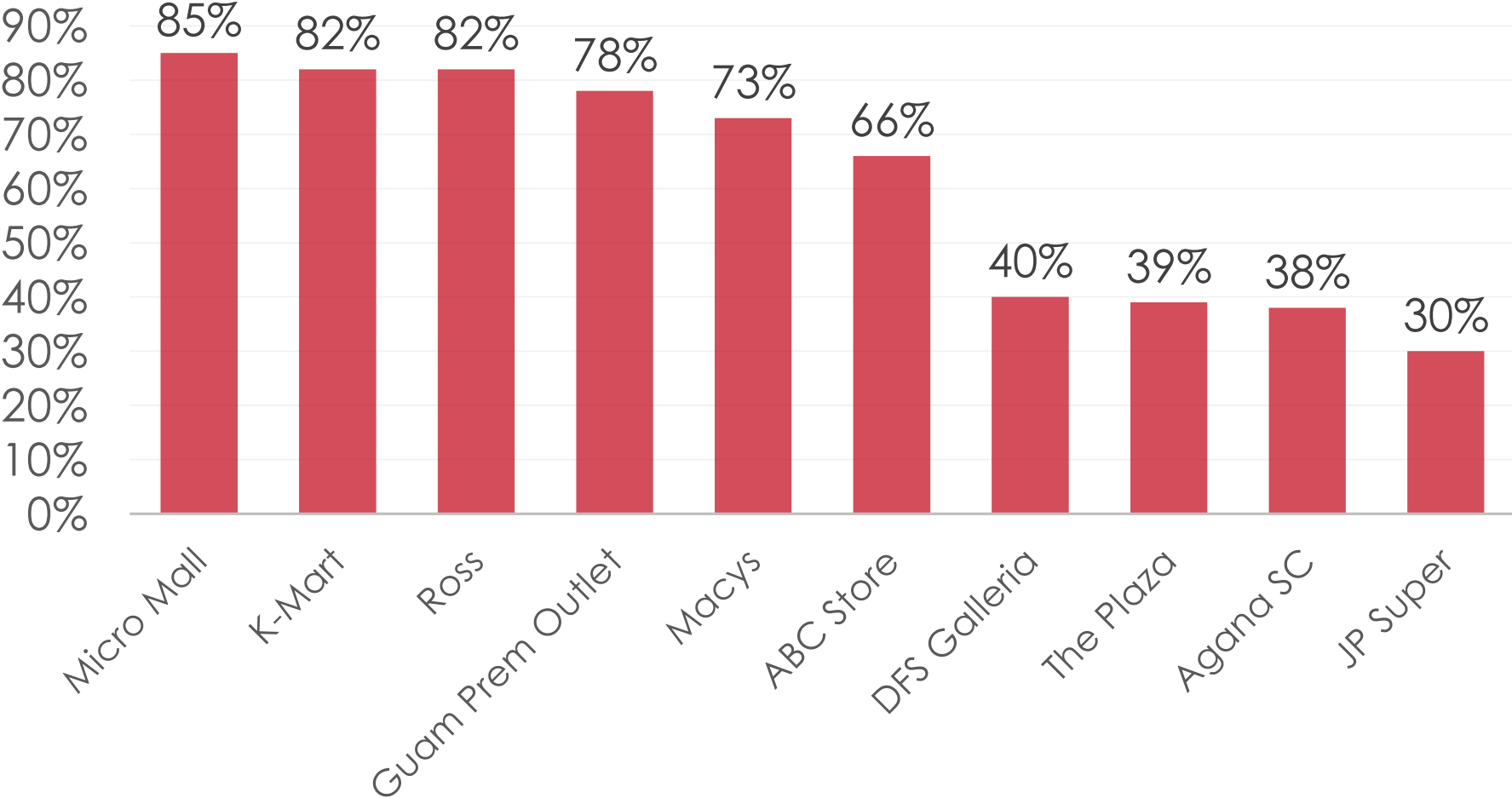
ACCOMMODATIONS – Satisfaction by Category



DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



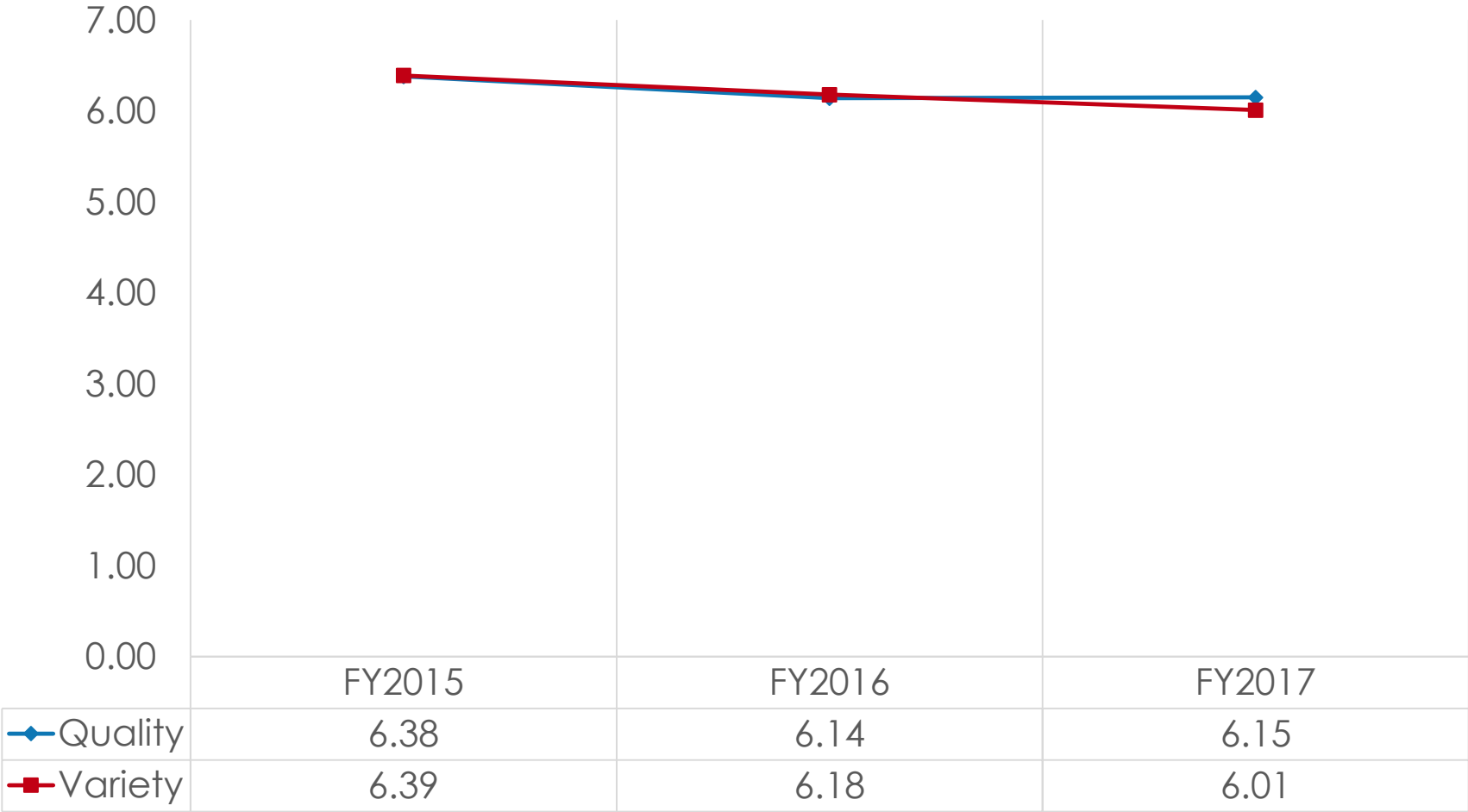
Shopping Malls/ Stores (Top Responses)



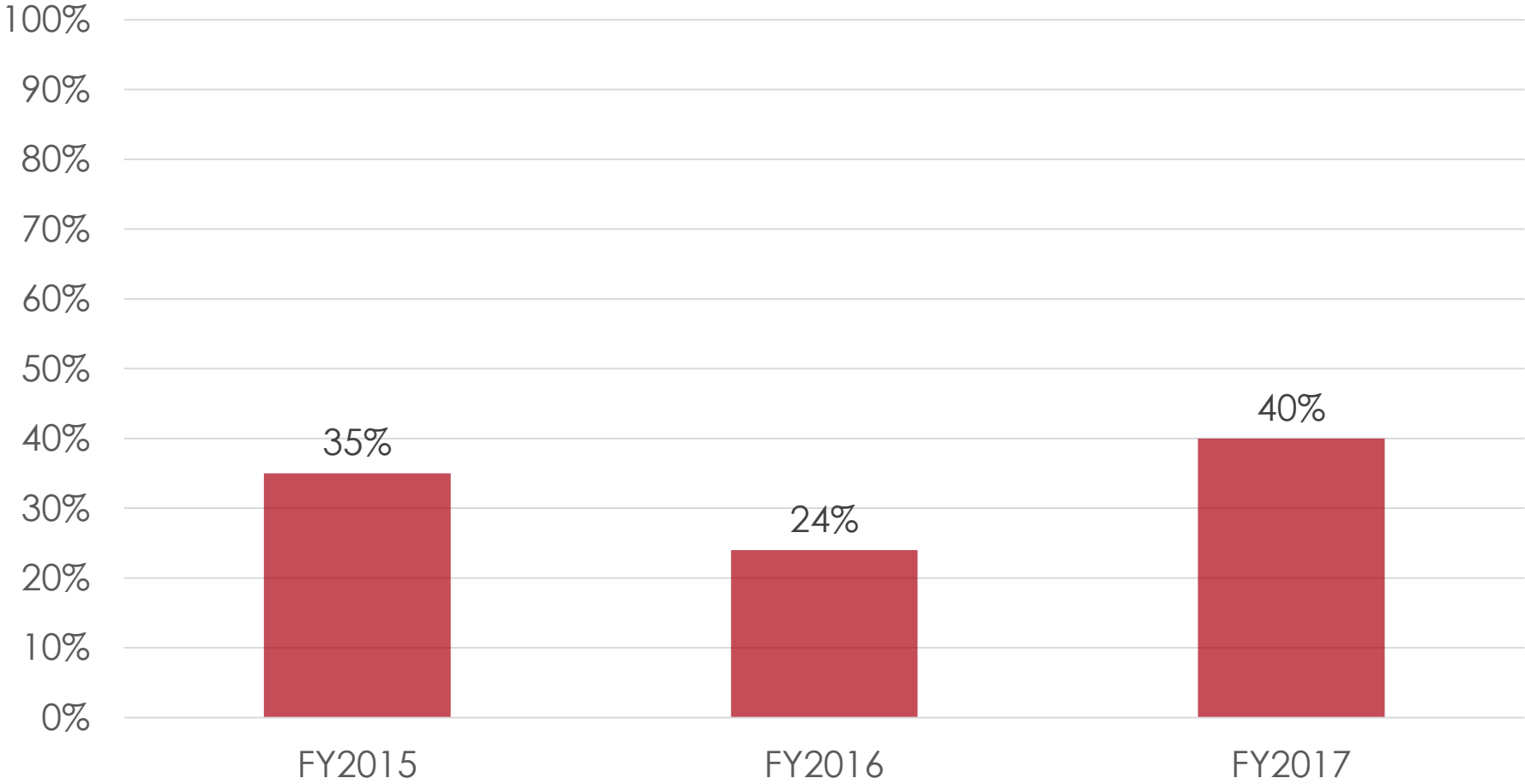
Shopping Malls/ Stores (Top Responses)

FY2015	FY2016	FY2017
83% K-Mart 77% Guam Premium Outlet 75% Ross	82% Micronesian Mall 81% K-Mart 78% Ross	85% Micronesian Mall 82% Ross 82% K-Mart

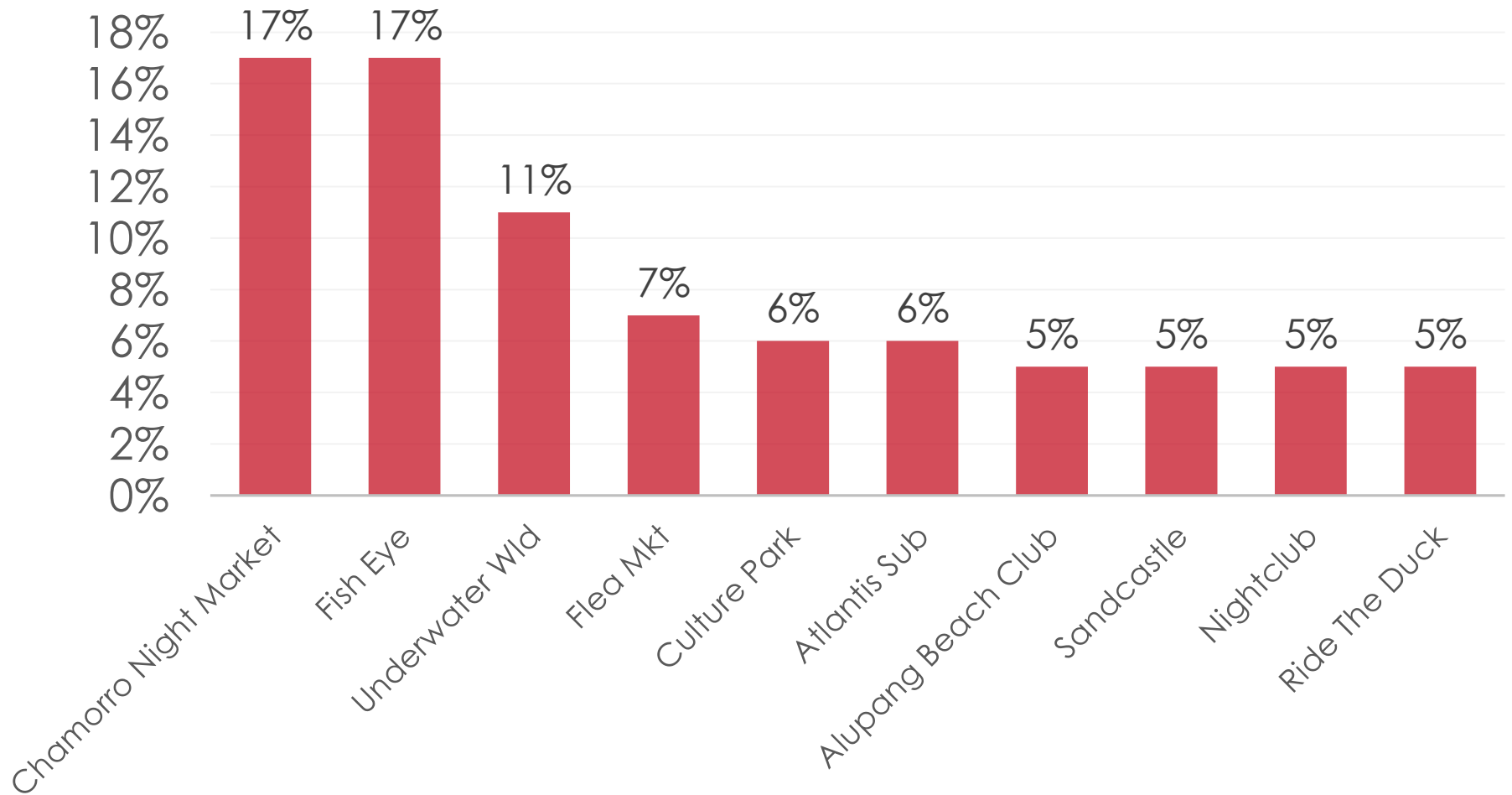
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – Tracking

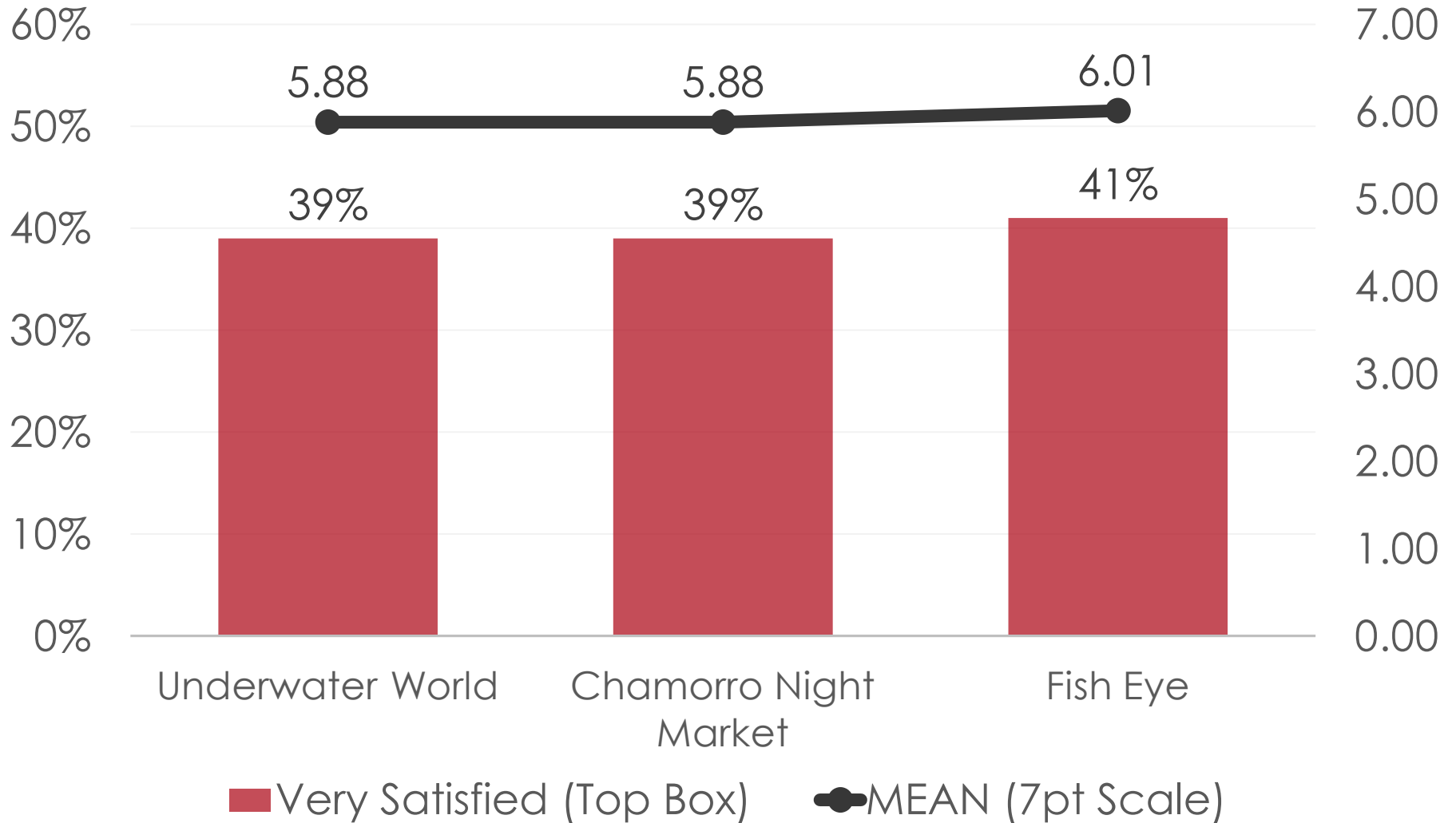


Optional Tour Participation (Top Responses) FY2017

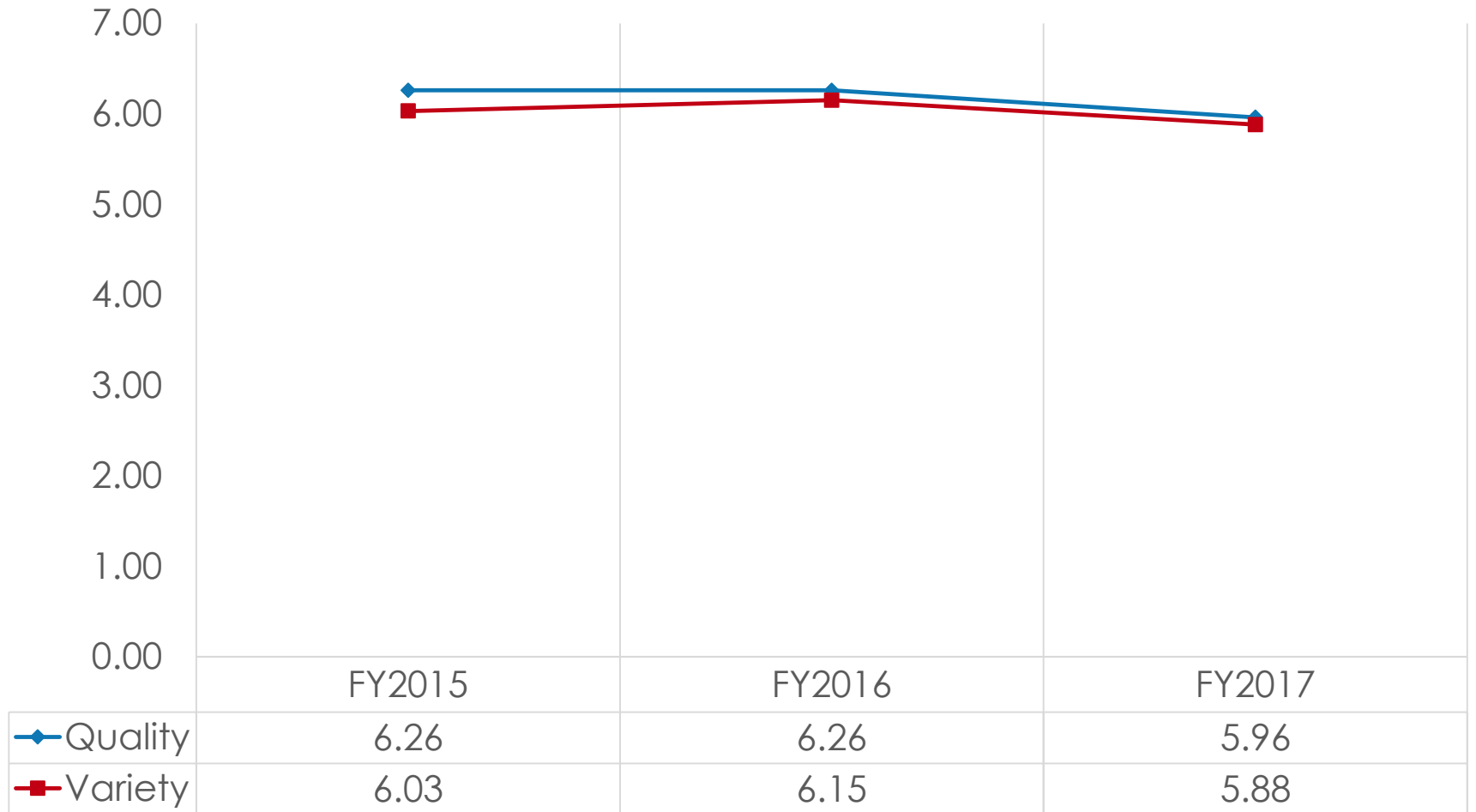


Optional Tour Satisfaction

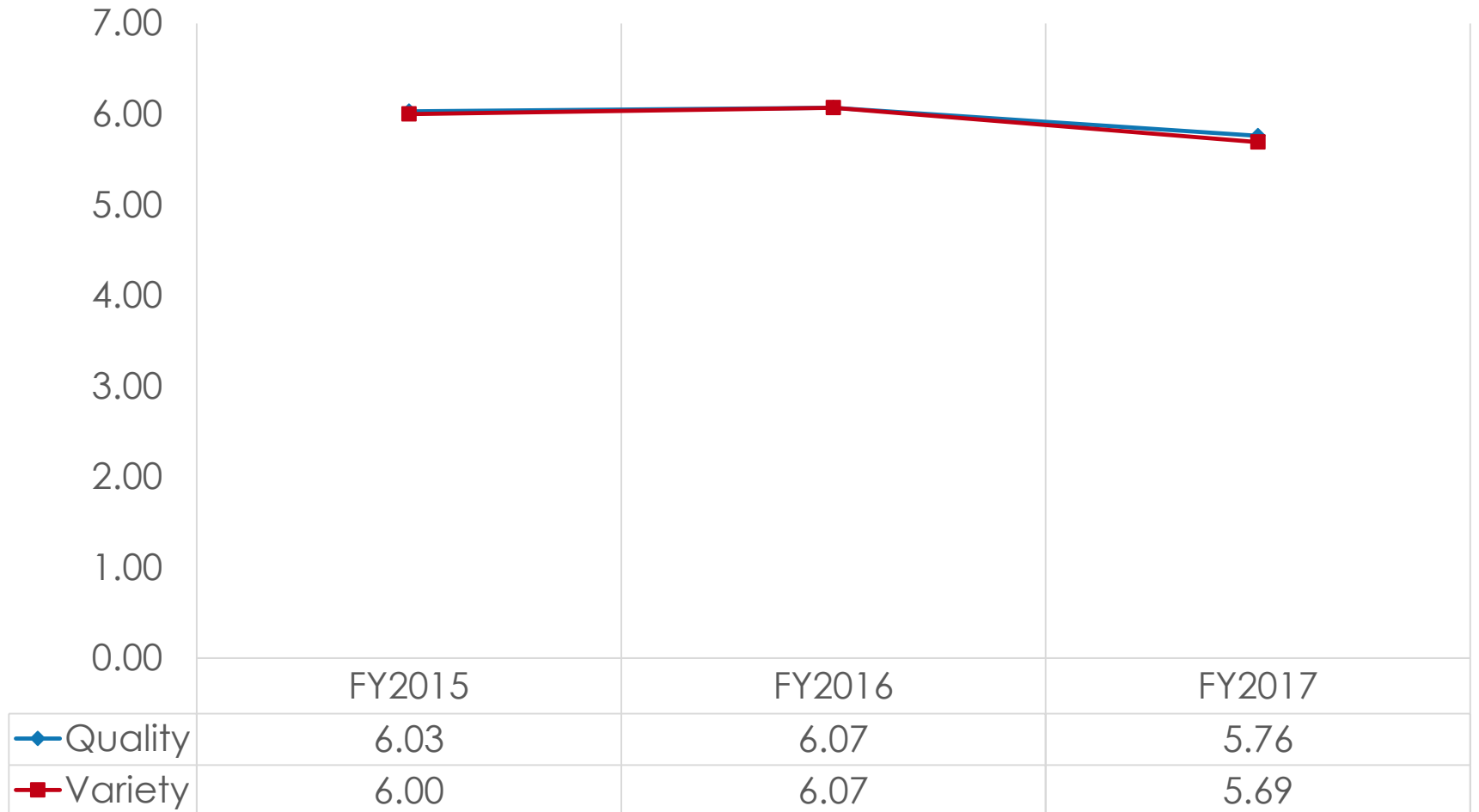
Top Responses only - Participation (10%+)



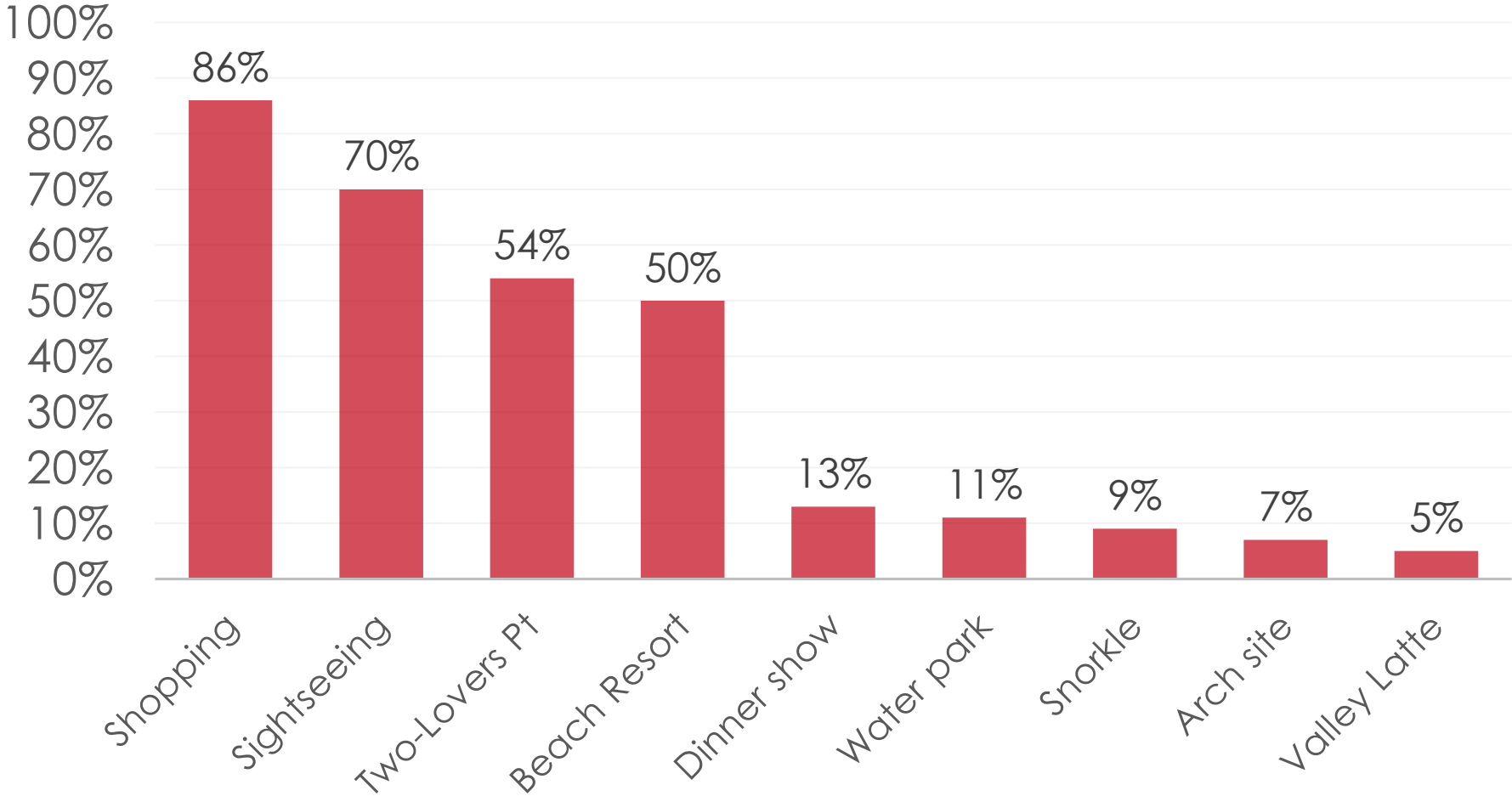
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

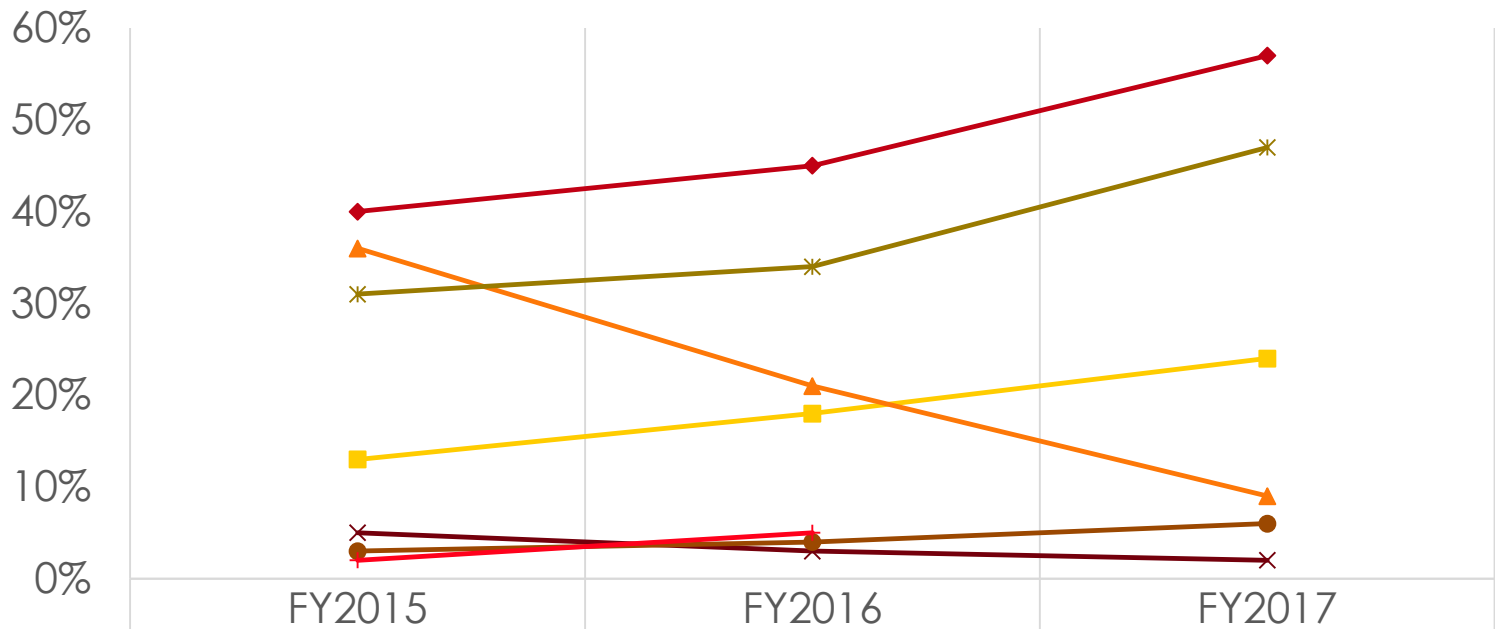


Activities Participation (Top Responses)



SECTION 5 PROMOTIONS

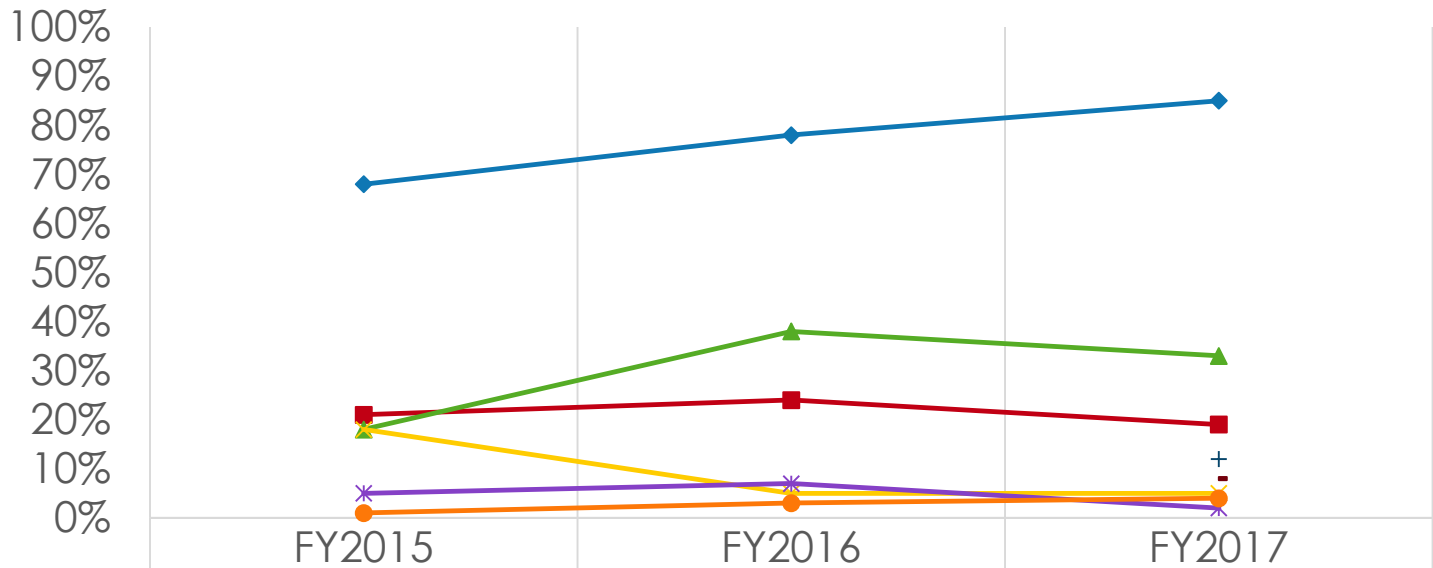
INTERNET- GUAM SOURCES OF INFORMATION



◆ Search Engines	40%	45%	57%
■ Blogs	13%	18%	24%
▲ None	36%	21%	9%
✕ Q&A sites	5%	3%	2%
* Social network	31%	34%	47%
● Forums	3%	4%	6%
◆ Other	2%	5%	

INTERNET- SOURCES OF INFORMATION

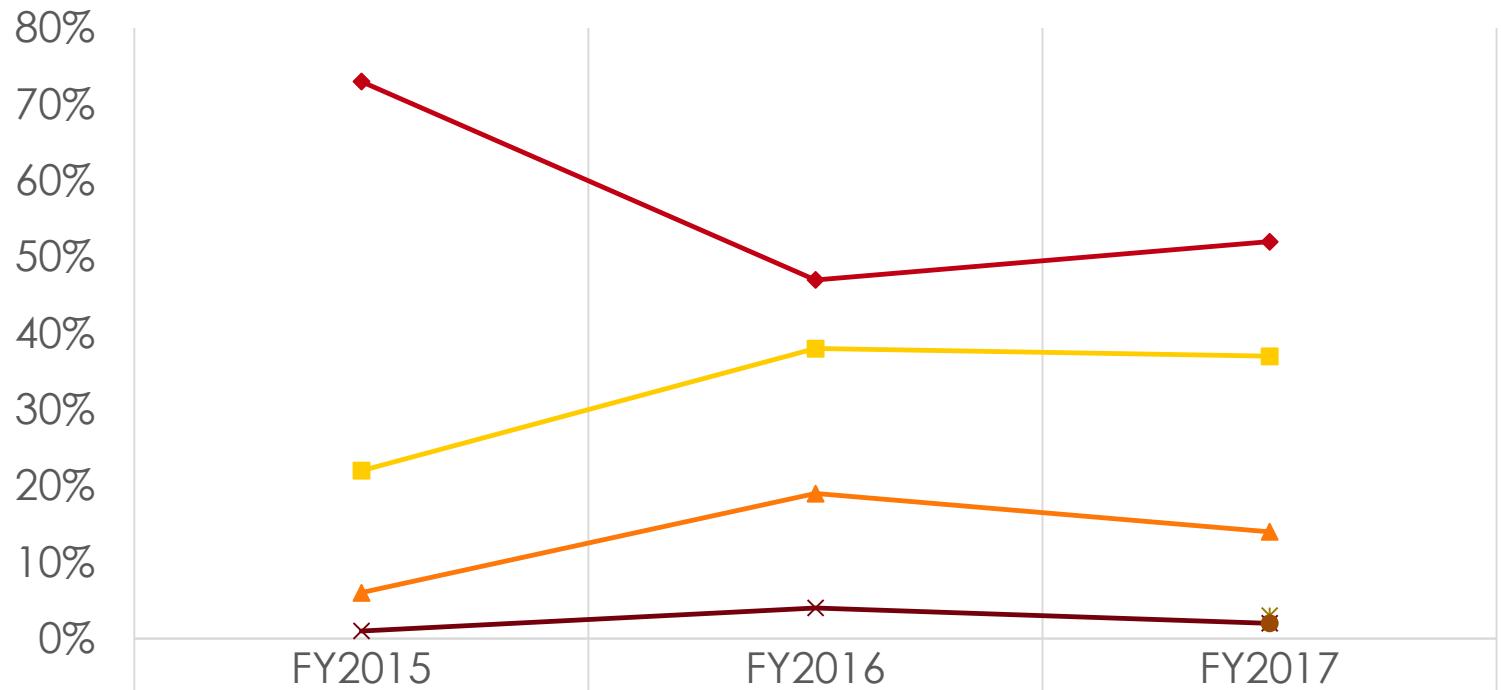
Things to do on Guam



Google	68%	78%	85%
Yahoo	21%	24%	19%
Facebook	18%	38%	33%
None	18%	5%	5%
Other	5%	7%	2%
Twitter	1%	3%	4%
Instagram			12%
Online booking site			8%

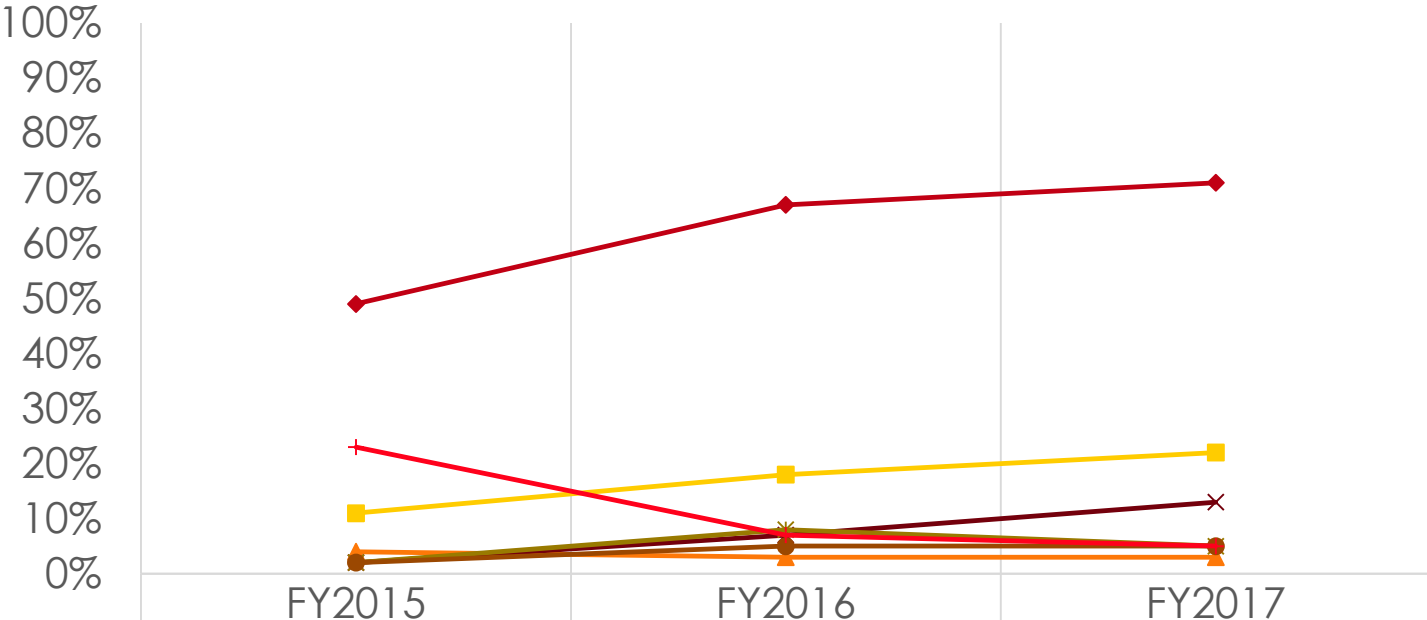
INTERNET- SOURCES OF INFORMATION

GVB



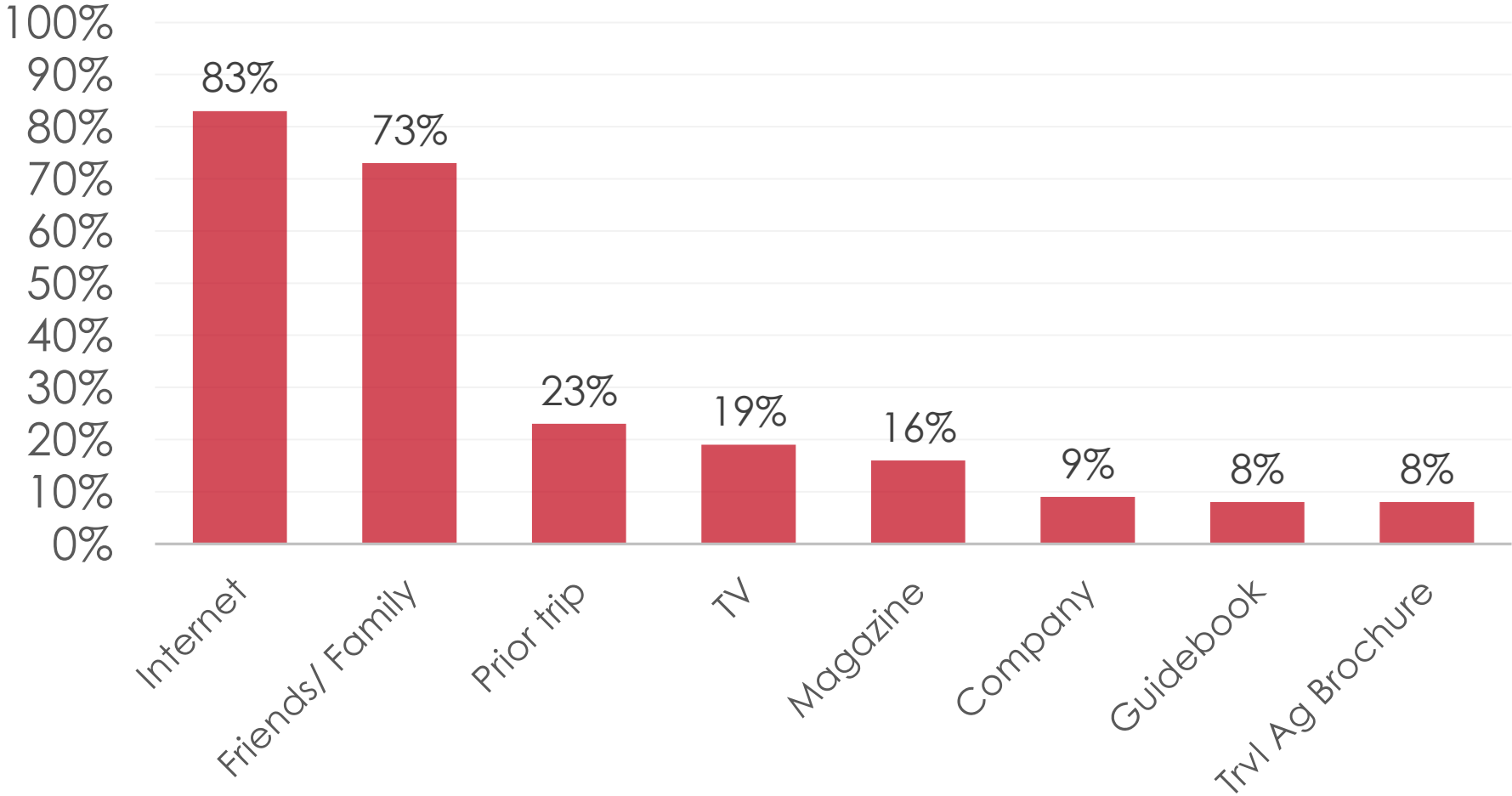
◆ None	73%	47%	52%
■ GVB Website	22%	38%	37%
▲ GVB Facebook	6%	19%	14%
× GVB Twitter	1%	4%	2%
* GVB Instagram			3%
● GVB Café			2%

TRAVEL MOTIVATION



◆ Friends/ Family	49%	67%	71%
■ Internet	11%	18%	22%
▲ Travel Agent	4%	3%	3%
✕ Social media	2%	7%	13%
* Travel shows	2%	8%	5%
● Magazine	2%	5%	5%
+ Company/ Bus Trip	23%	7%	5%

PRE-ARRIVAL SOURCES OF INFORMATION

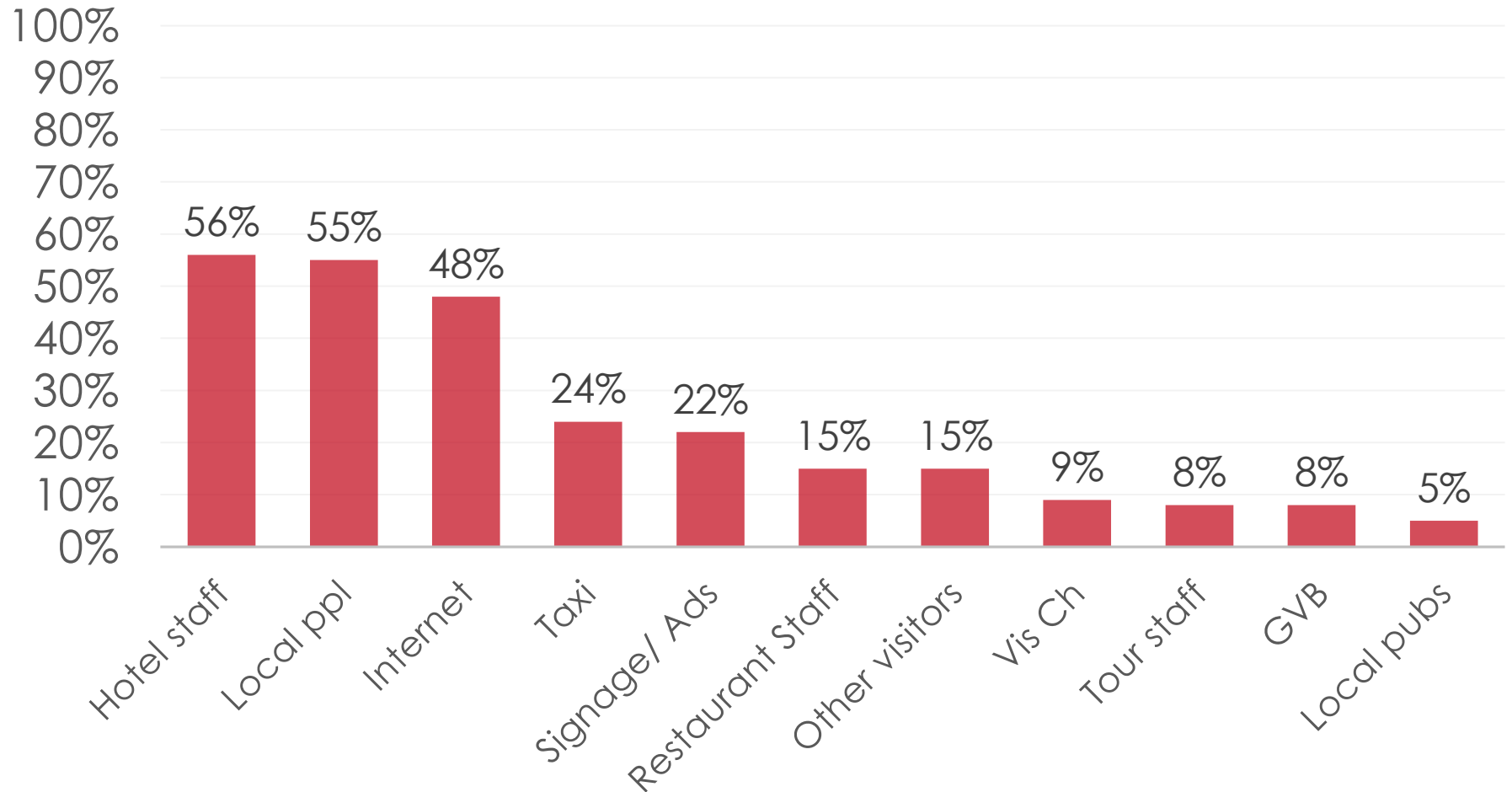


PRE-ARRIVAL SOURCES OF INFORMATION

FY2015	FY2016	FY2017
43% Internet 38% Recommend 5% Brochure	50% Internet 29% Recommend 7% Prior trip	83% Internet/ App 73% Recommend 23% Prior trip

ONISLE

SOURCES OF INFORMATION



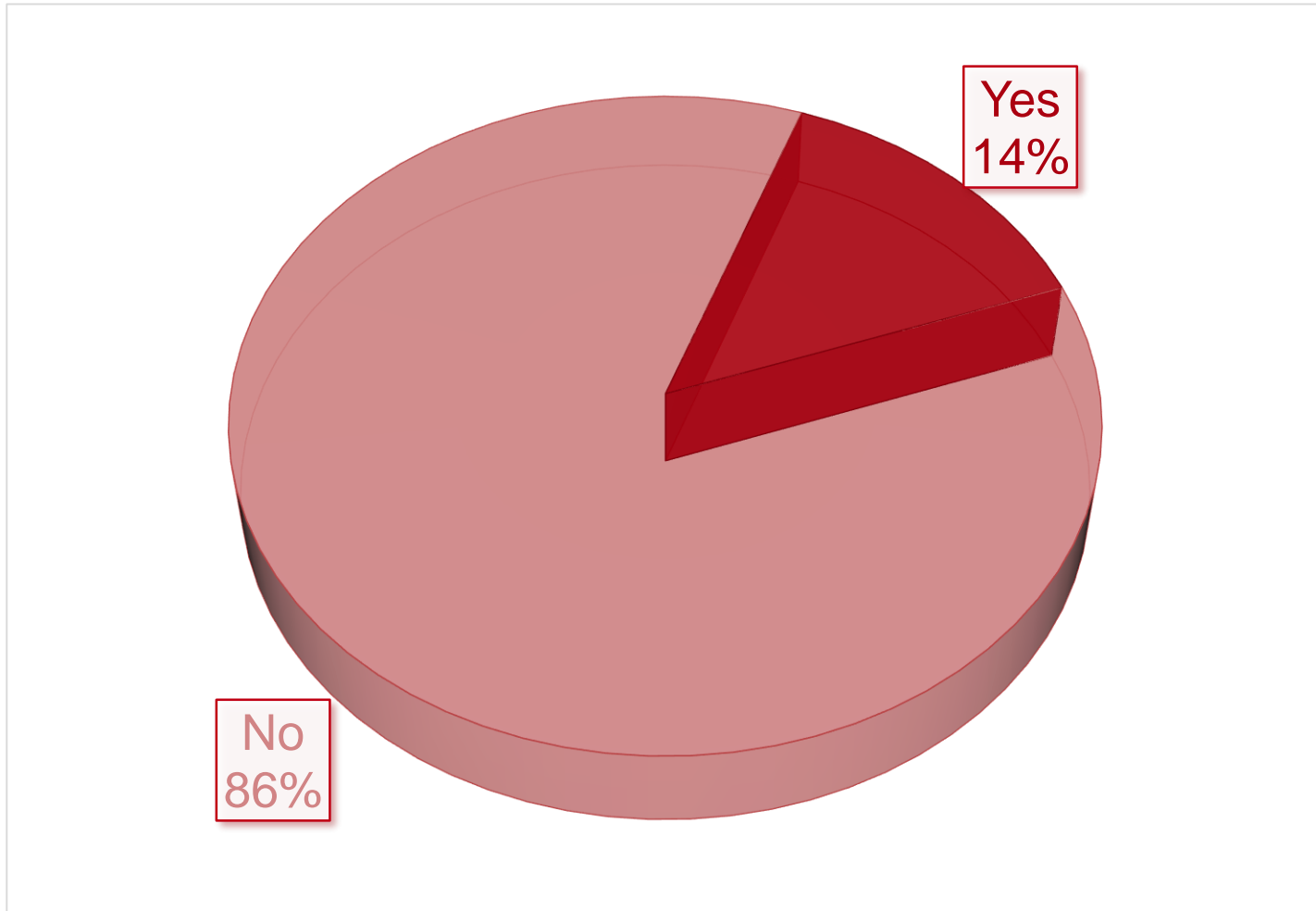
ON-ISLE SOURCES OF INFORMATION

FY2015	FY2016	FY2017
25% Local people 20% Internet 15% Tour staff	30% Internet 23% Local people 17% Hotel staff	56% Hotel staff 55% Local people 48% Internet/ App

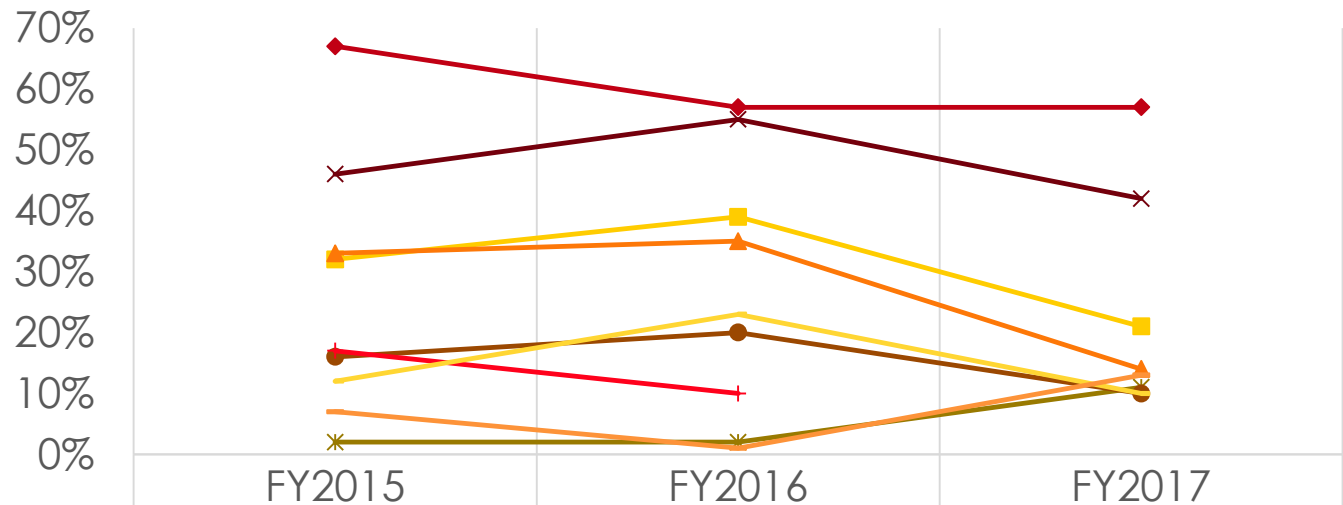
SECTION 6

FUTURE TRAVEL TO GUAM

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

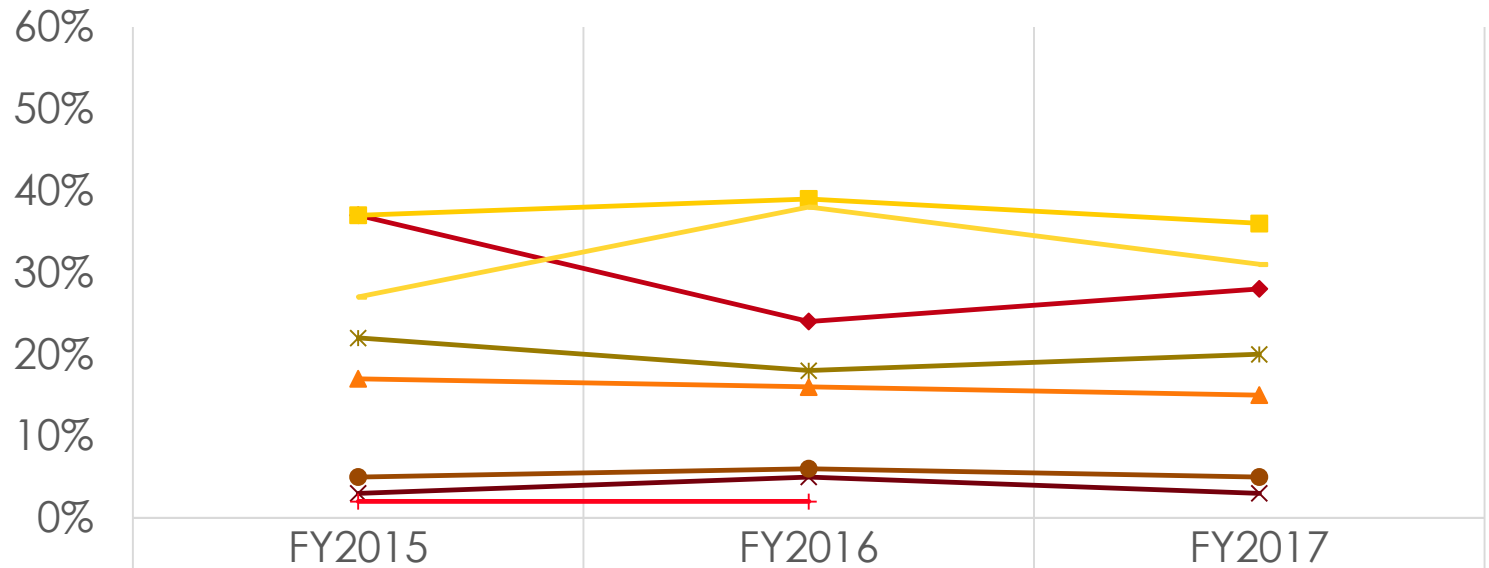


FUTURE TRAVEL CONCERNS



	FY2015	FY2016	FY2017
◆ Safety	67%	57%	57%
■ Terrorism	32%	39%	21%
▲ Food	33%	35%	14%
✕ Expense	46%	55%	42%
* Discrimination	2%	2%	11%
● Should spend at home	16%	20%	10%
+ Other	17%	10%	
— Don't know	12%	23%	10%
— No concerns	7%	1%	13%

What would it take to make you stay an extra day on Guam?

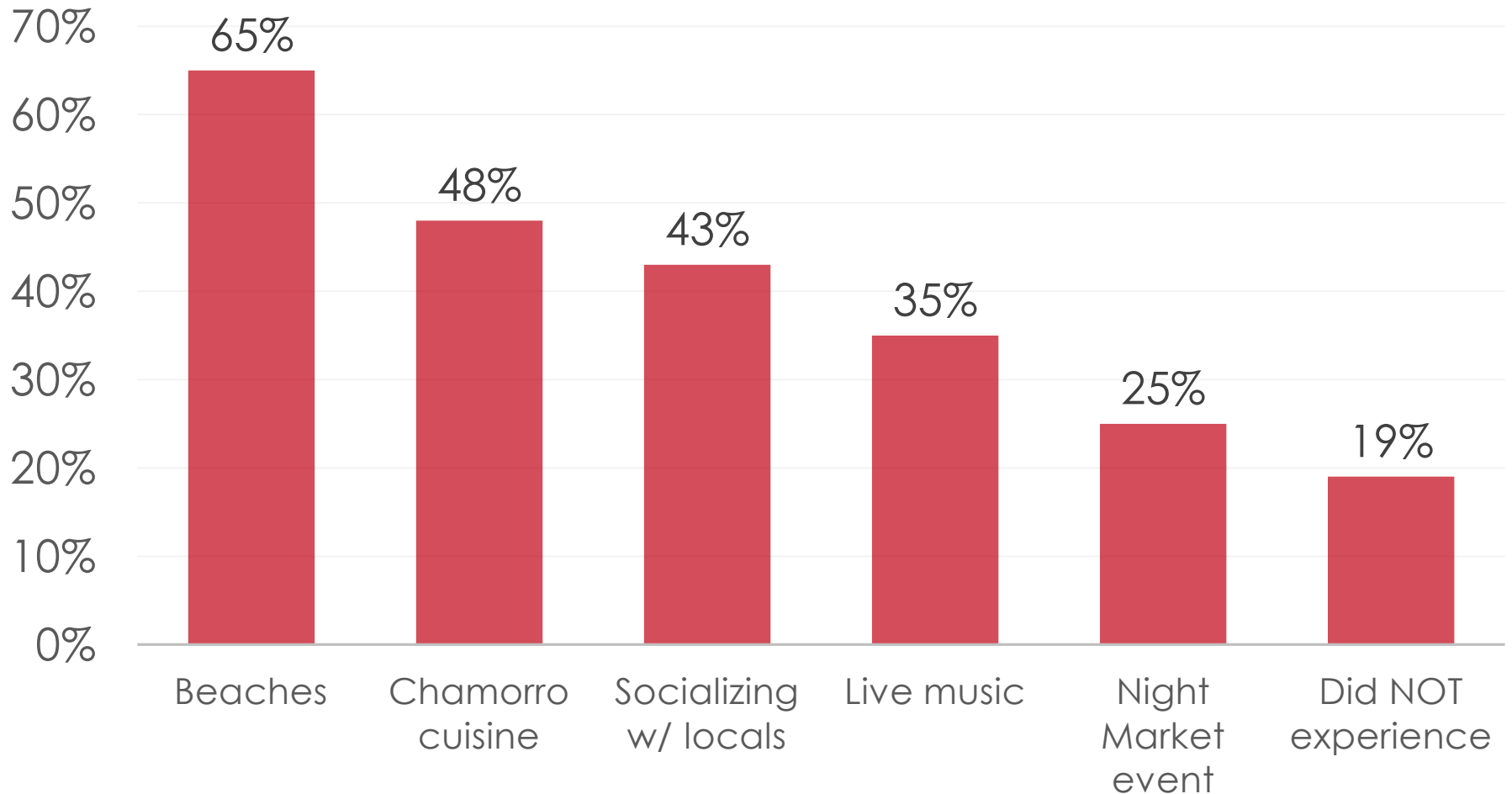


◆ More time	37%	24%	28%
■ Budget/ money	37%	39%	36%
▲ Flt Schedule	17%	16%	15%
✕ Less restrictions	3%	5%	3%
* Things to do	22%	18%	20%
● Pkg-longer stay	5%	6%	5%
+ Other	2%	2%	
— Nothing	27%	38%	31%

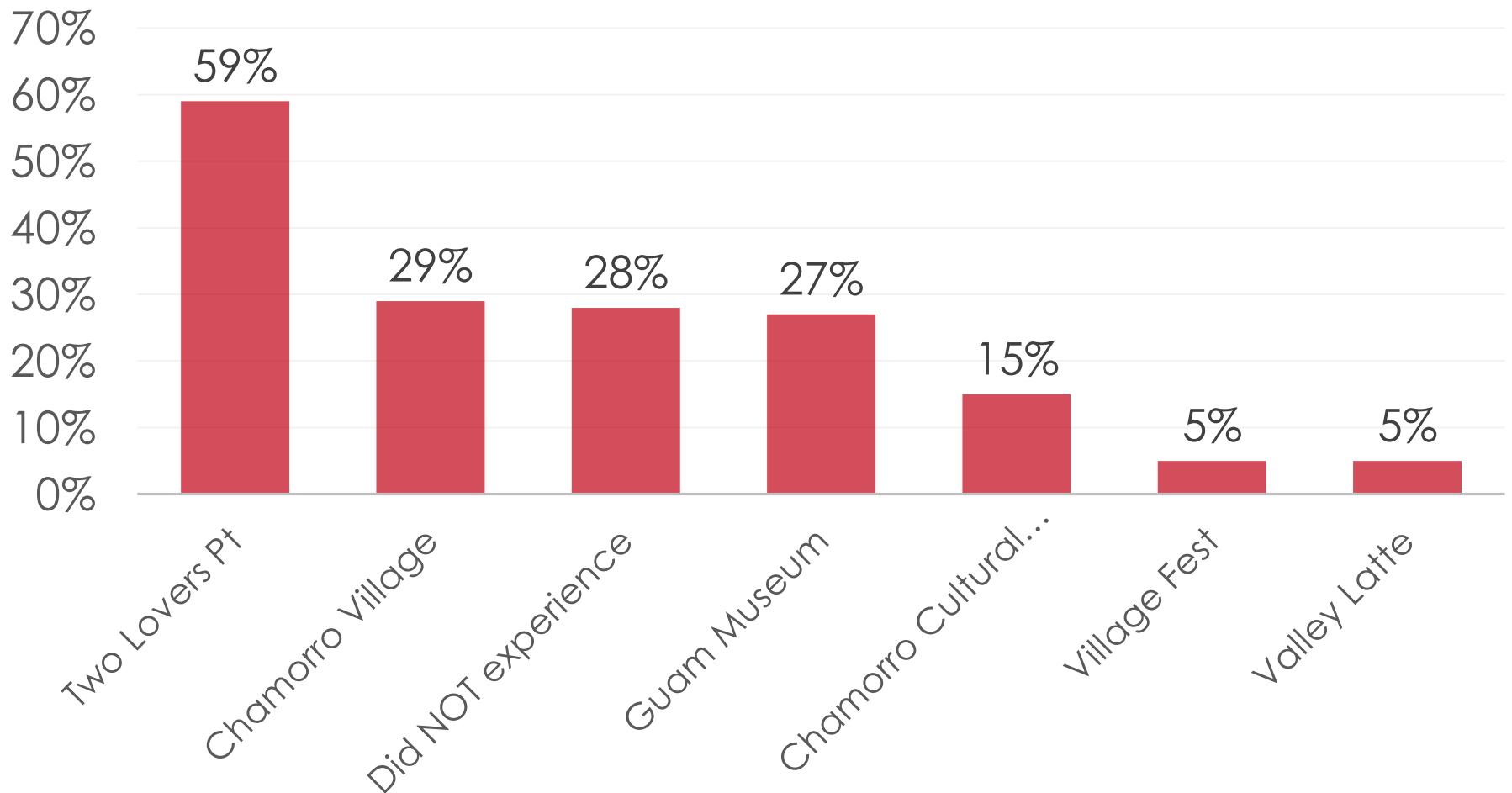
SECTION 7

GUAM CULTURE

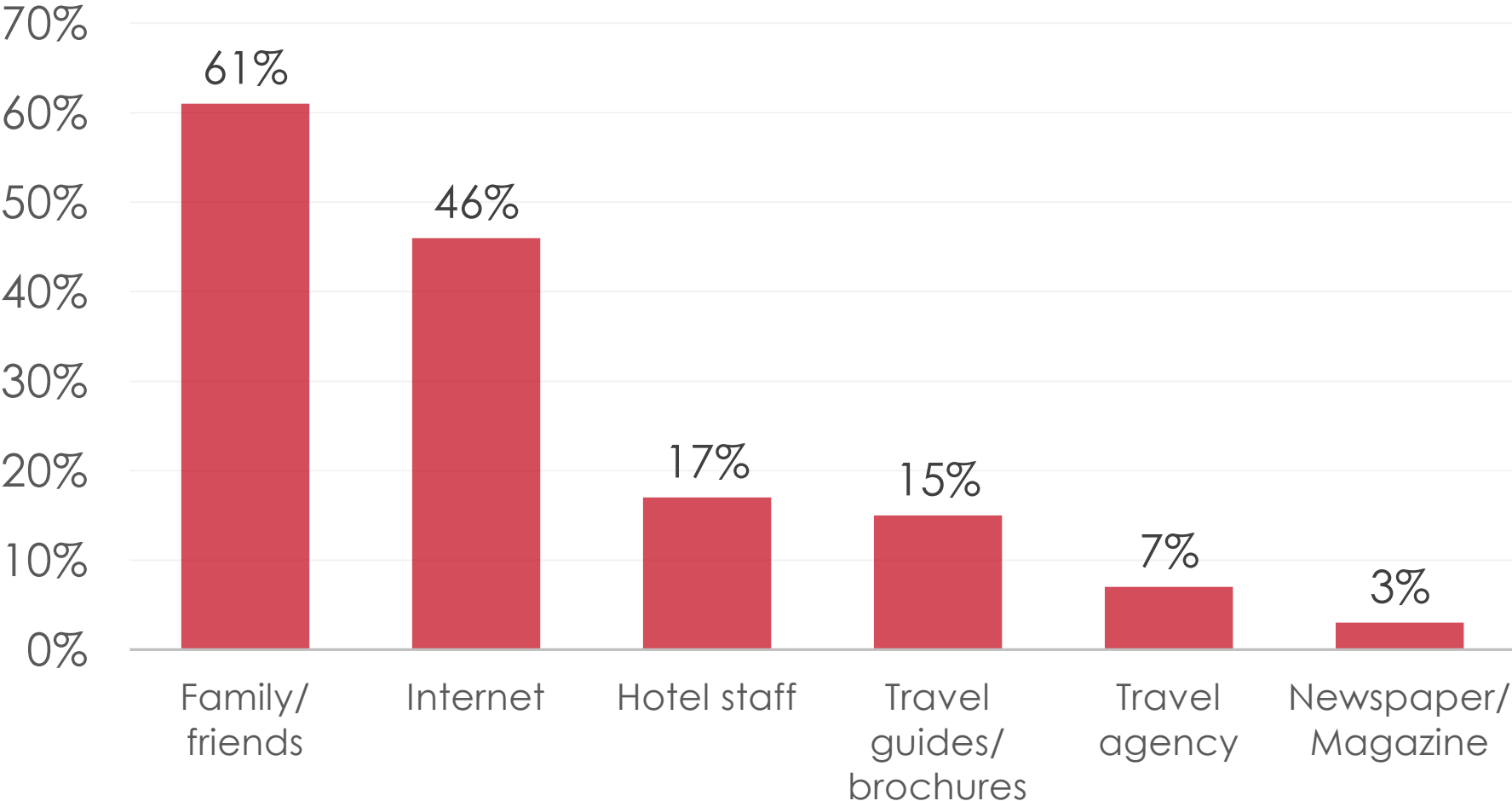
EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT



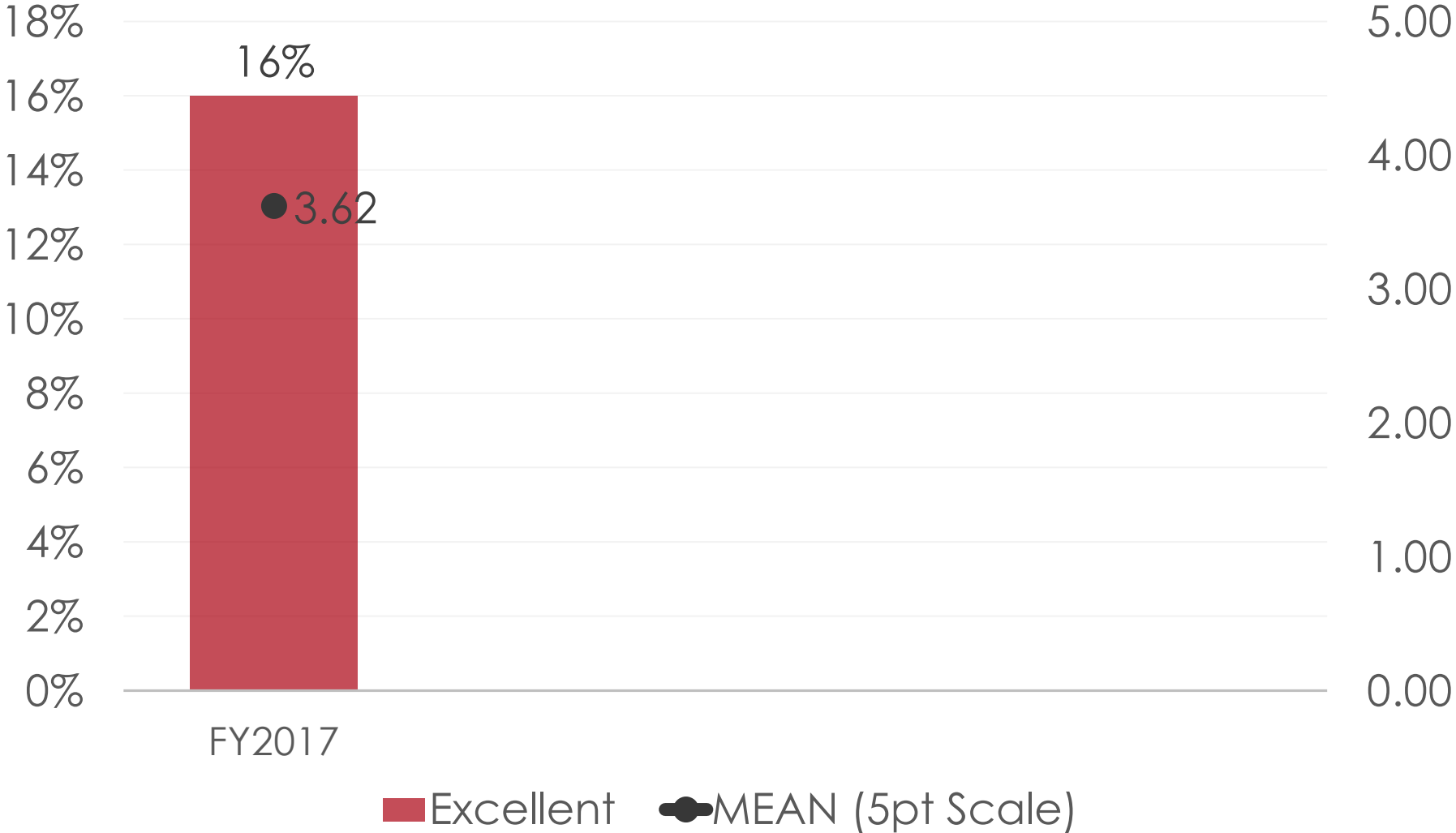
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



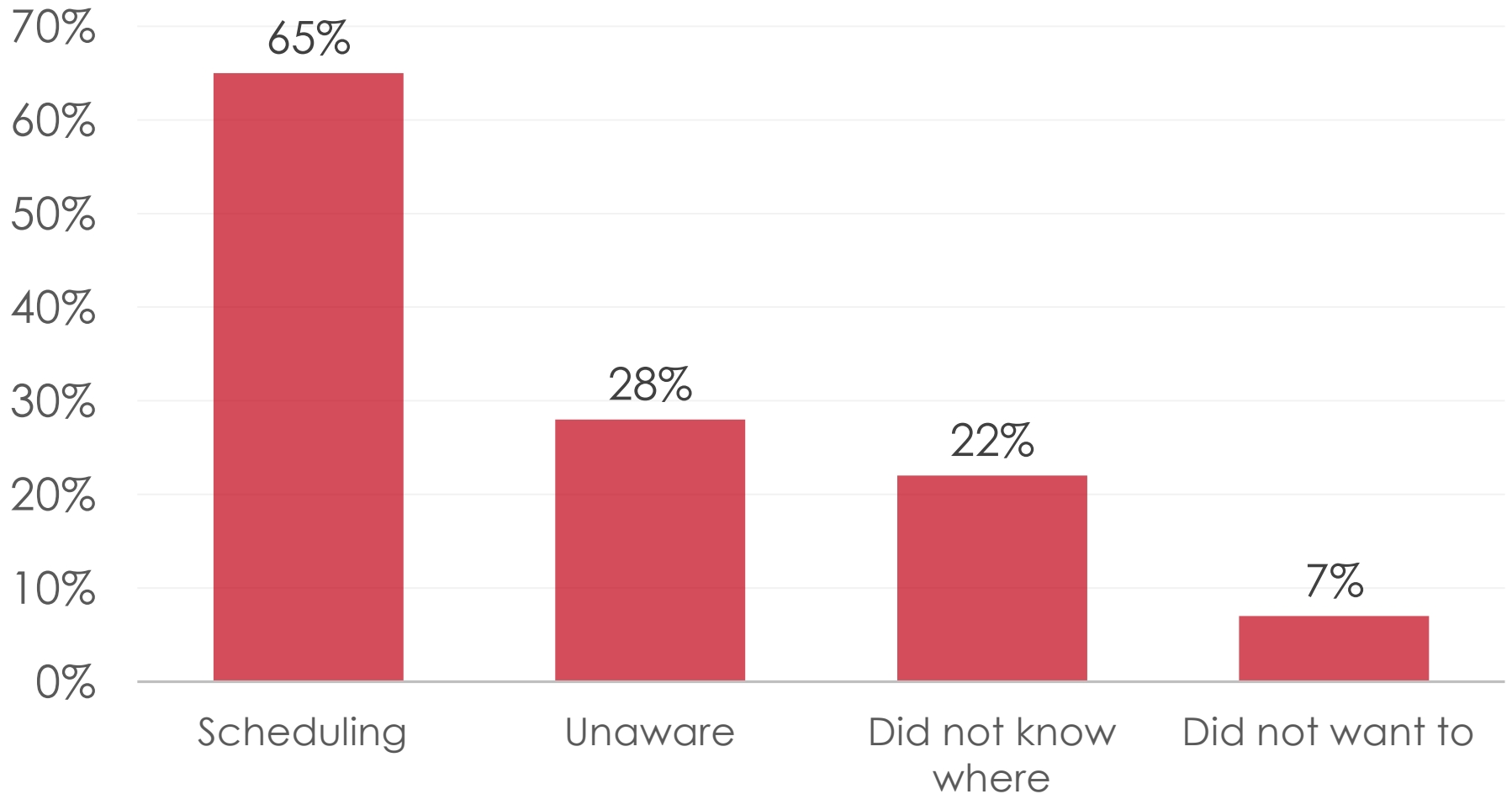
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



SATISFACTION- CULTURAL ACTIVITY/EVENTS



OBSTACLES- CULTURAL ACTIVITY/EVENTS



SECTION 8

ADVANCED STATS

Analysis Technique

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ($p \leq .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Drivers of Overall Satisfaction

Drivers of Overall Satisfaction, Annual 2017	
	1-4 Qtr. Overall 2017 rank
Drivers:	
Quality & Cleanliness of beaches & parks	3
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	2
Variety of nighttime tours	
Quality of shopping	5
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	
Quality/cleanliness of air, sky	1
Quality/cleanliness of parks	
Quality of landscape in Tumon	4
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	76.9%

Drivers of Overall Satisfaction

- **Overall satisfaction** with Philippine visitor's experience on Guam is driven by five significant factors in the 2017 Period. By rank order they are:
 - **Quality/cleanliness of air, sky,**
 - **Quality of night time tours,**
 - **Quality & cleanliness of beaches & parks,**
 - **Quality of landscape in Tumon, and**
 - **Quality of shopping.**
- With all five factors the overall r^2 is .769 meaning that **76.9% of overall satisfaction is accounted for by these factors.**

Drivers of On-Isle Expenditures

Drivers of Per Person On Island Expenditures, Annual 2017	
Drivers:	Overall 2017 rank
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	0.0%
NOTE: Only significant drivers are included.	

Drivers of On Isle Expenditures

- **Per Person On Island Expenditure** of Philippine visitors on Guam is driven by no significant factors in the 2017 period.