

Guam Visitors Bureau

Philippine Visitor Tracker Exit Profile

FY2018 DATA AGGREGATION

Prepared by: Anthology Research

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#instaGuam



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 **428** departing Filipino 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 **428** is +/- 4.74 percentage points with a 95% confidence level. That is, if all Filipino 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 +/- 4.74 percentage points.

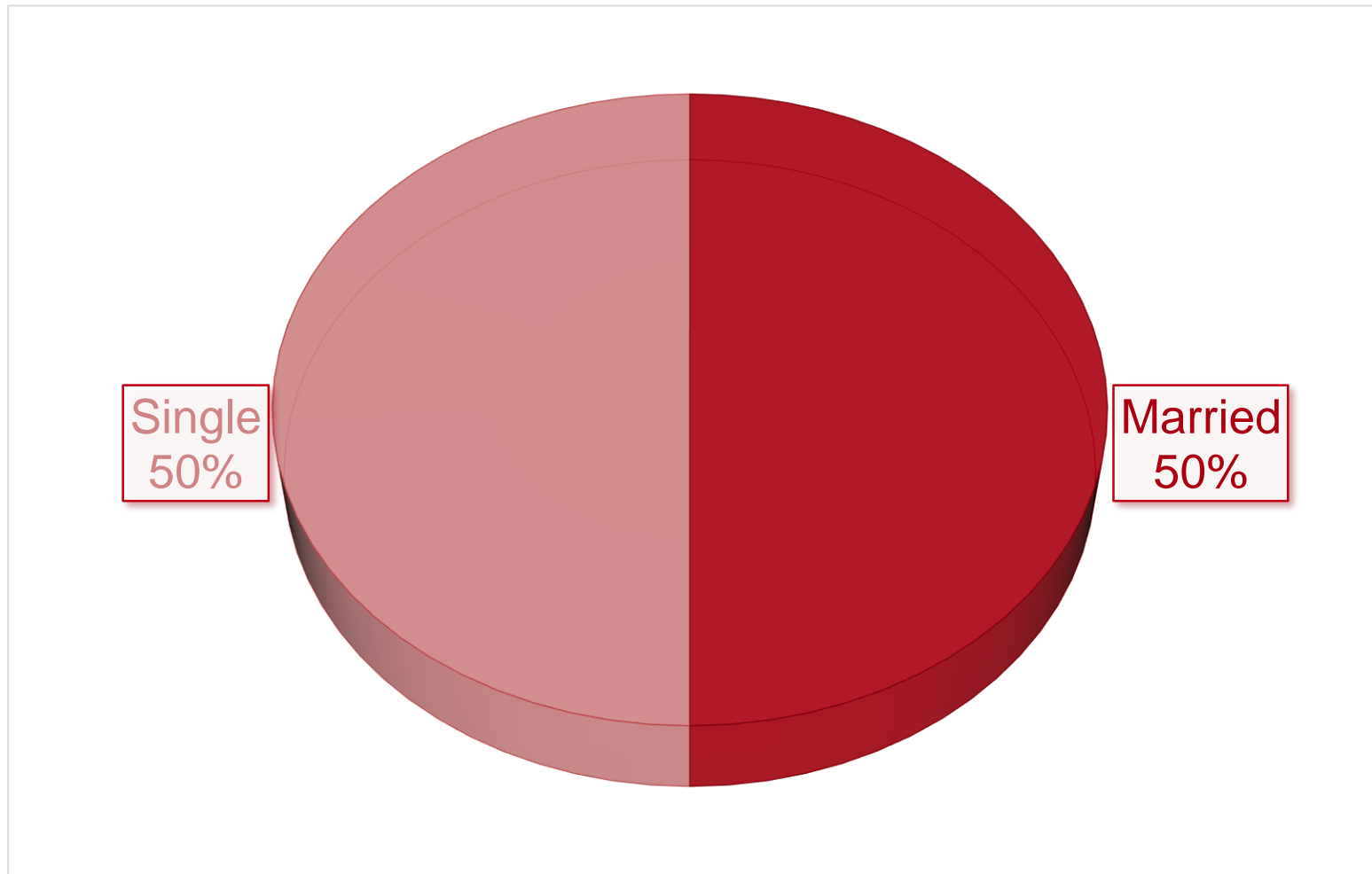
Objectives

- 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.

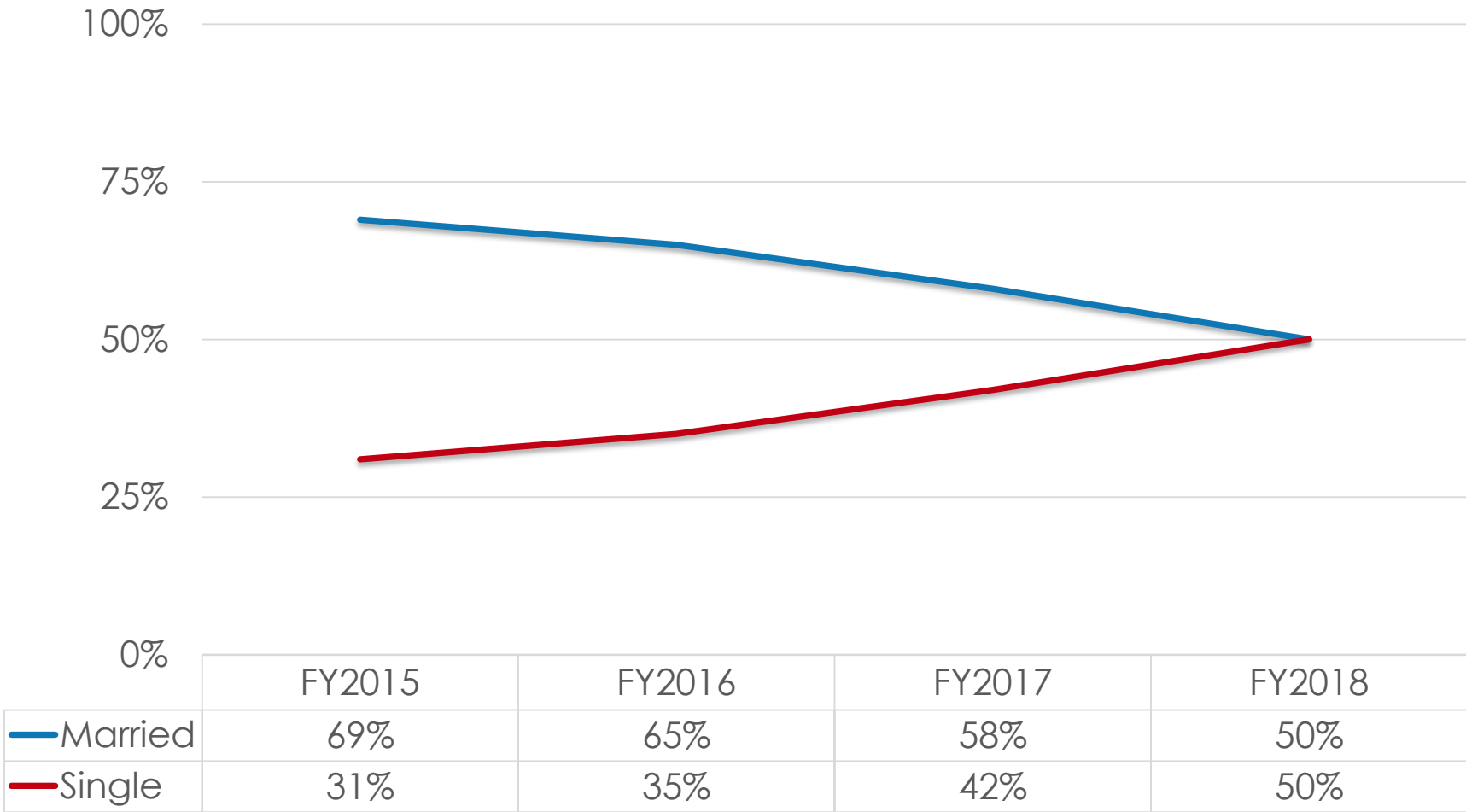
SECTION 1

PROFILE OF RESPONDENTS

Marital Status

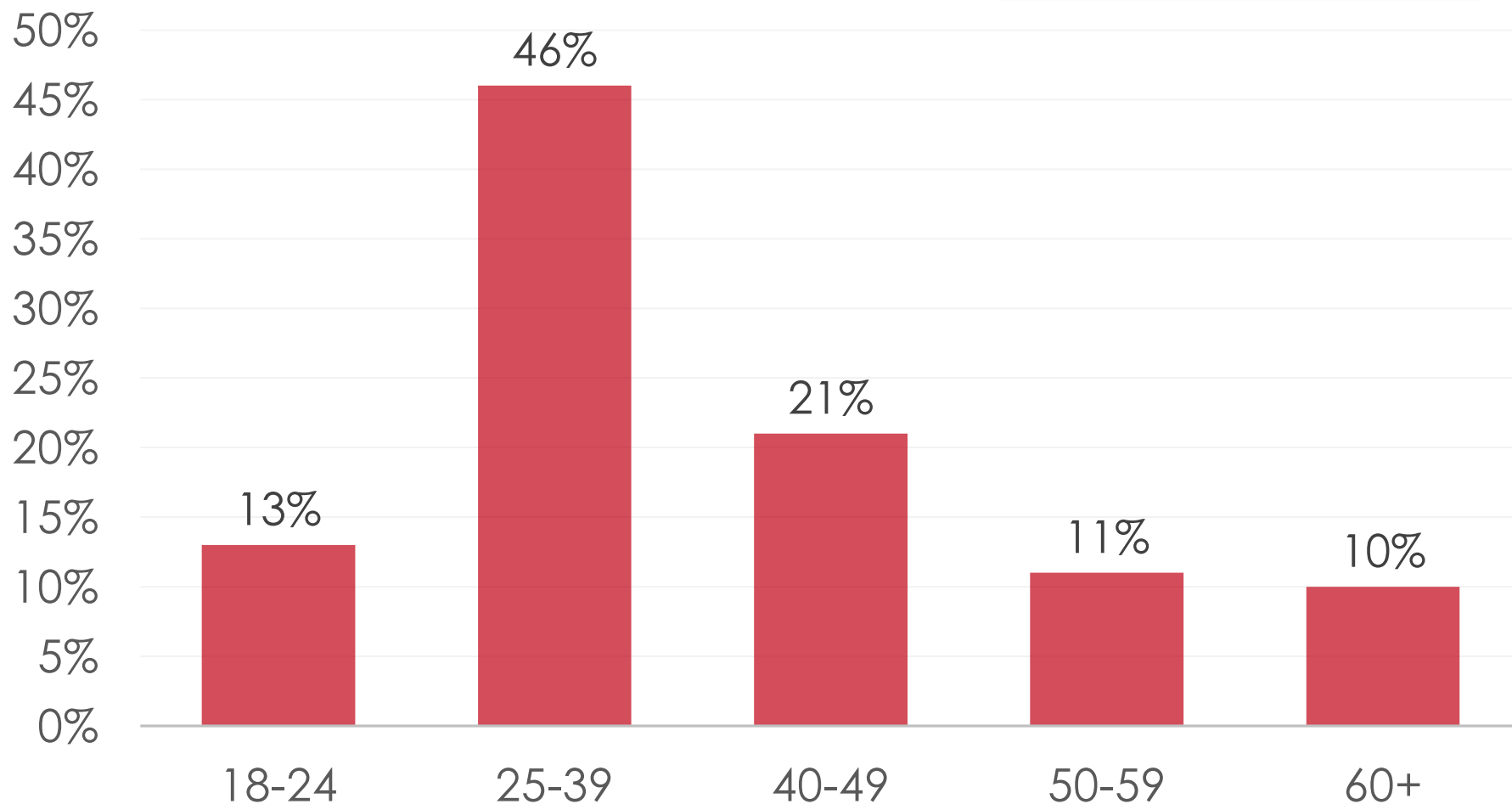


Marital status – Tracking

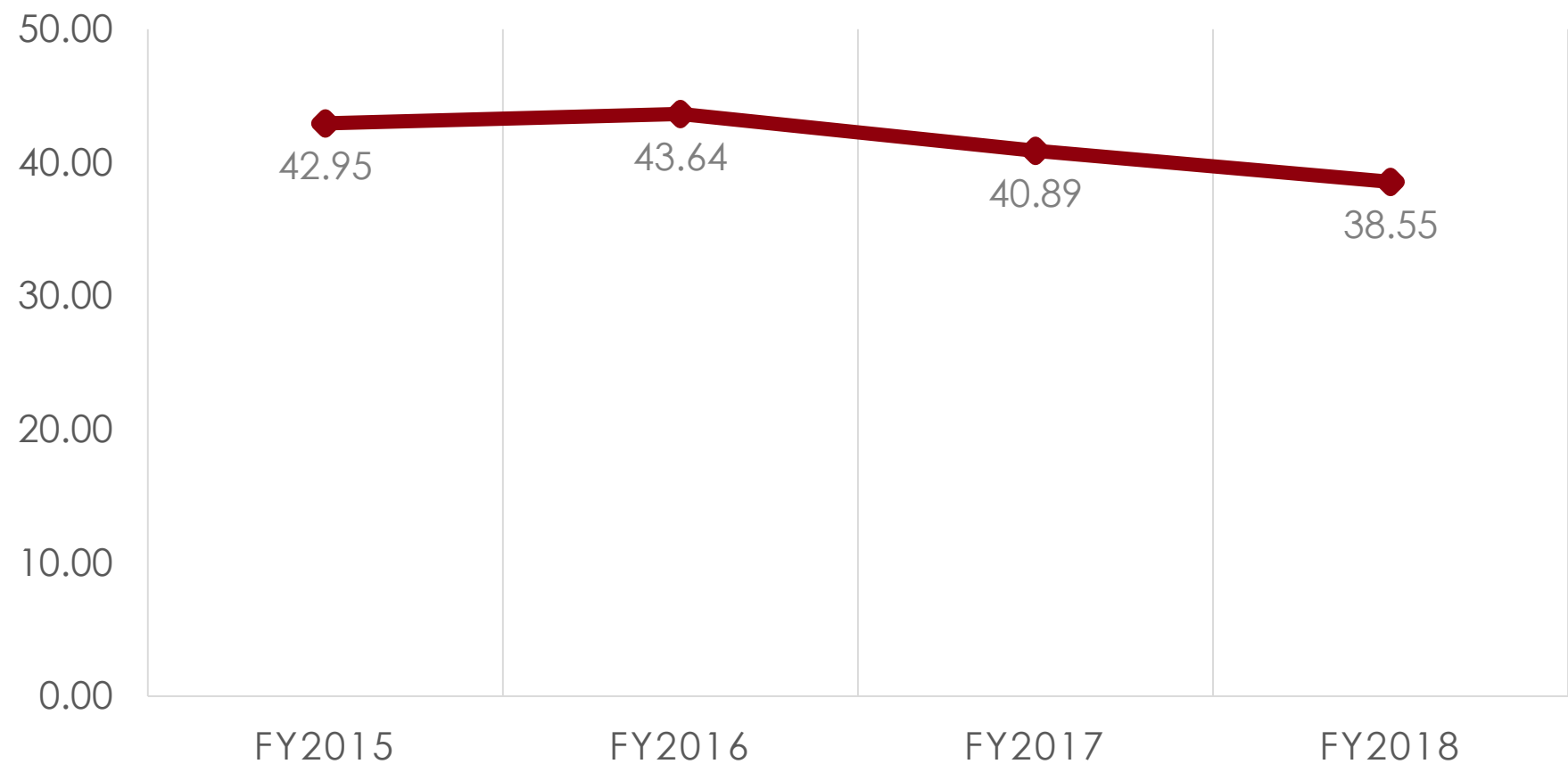


Age

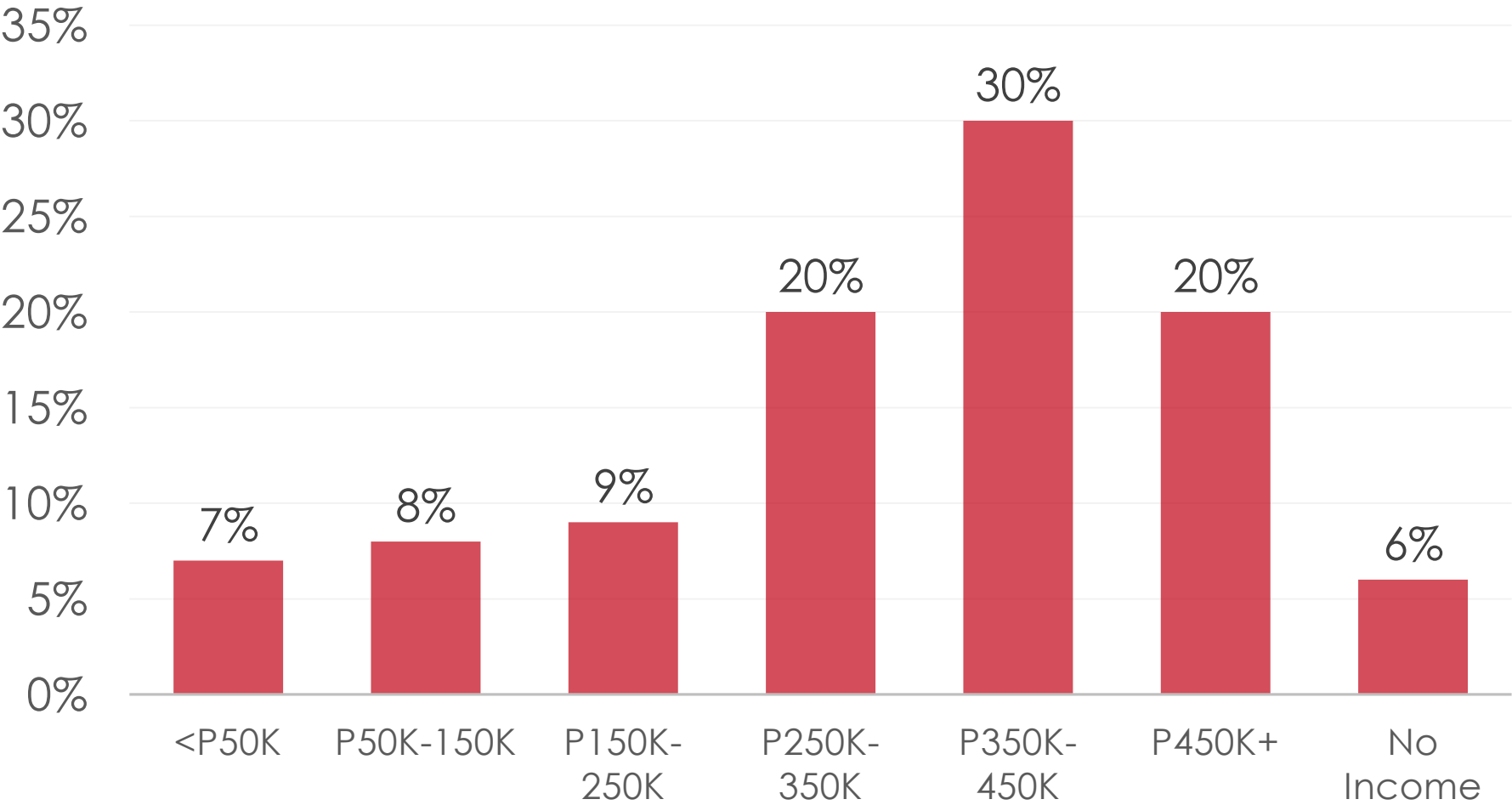
MEAN = 38.55
MEDIAN = 36



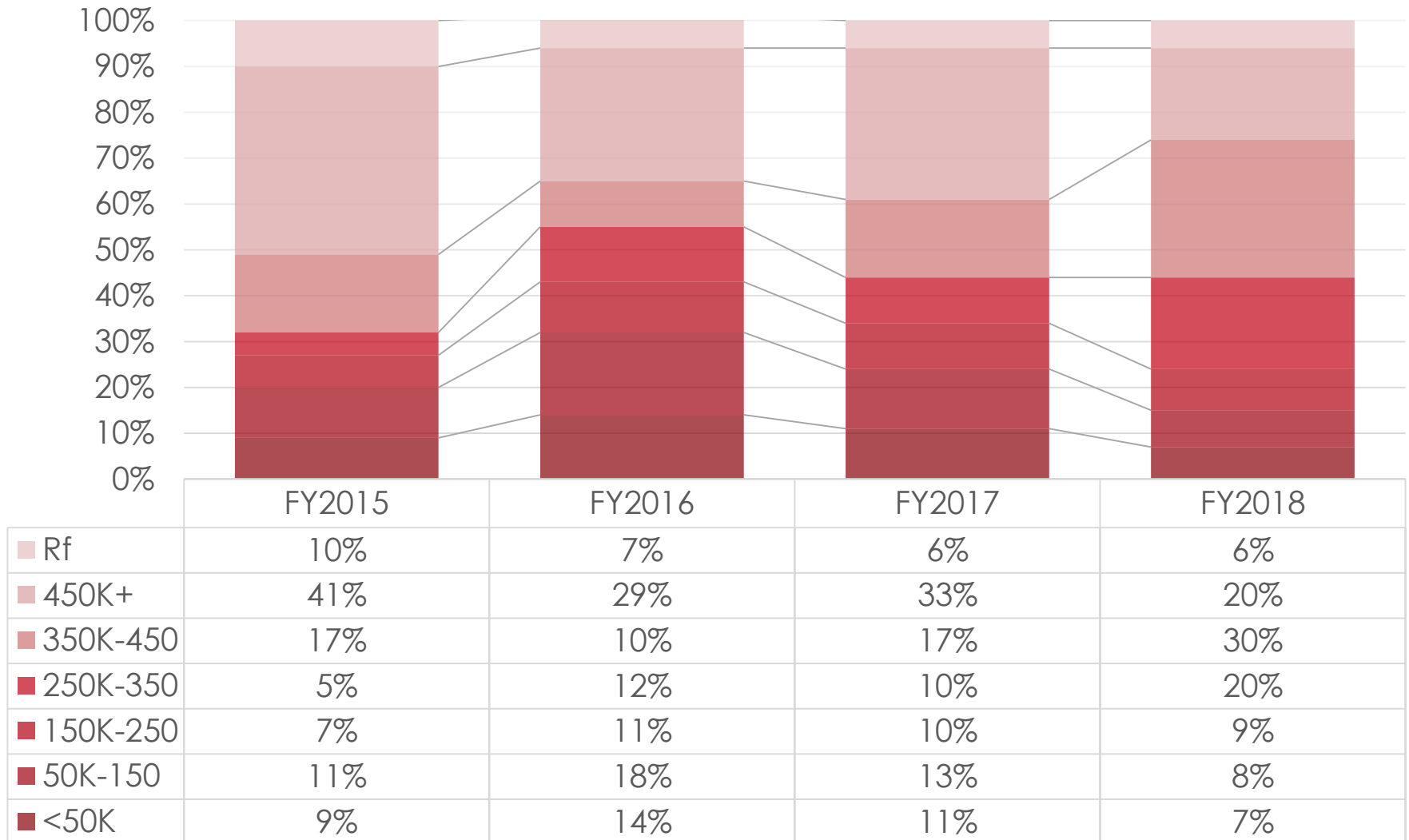
Age – Tracking



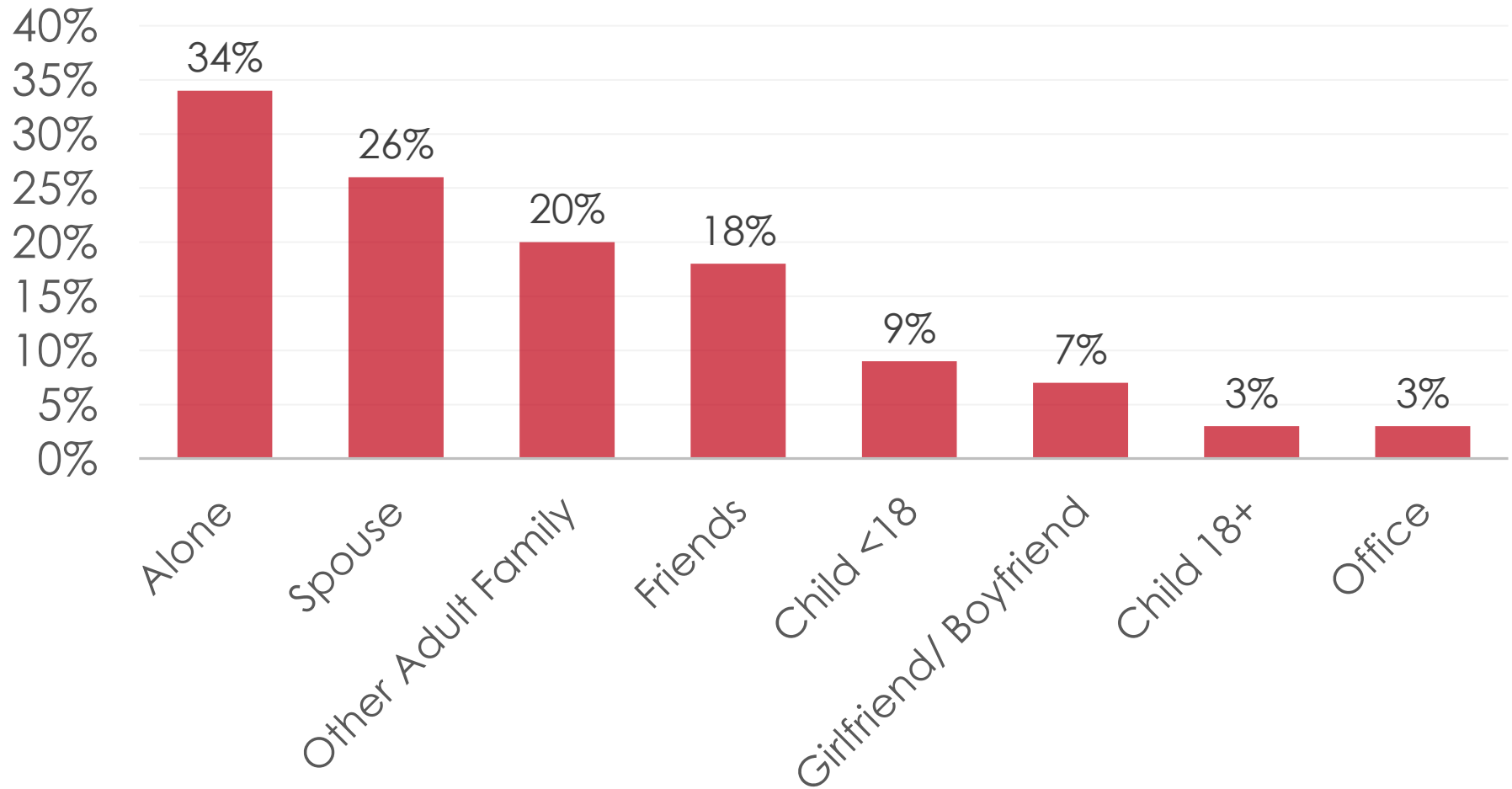
Annual Household Income



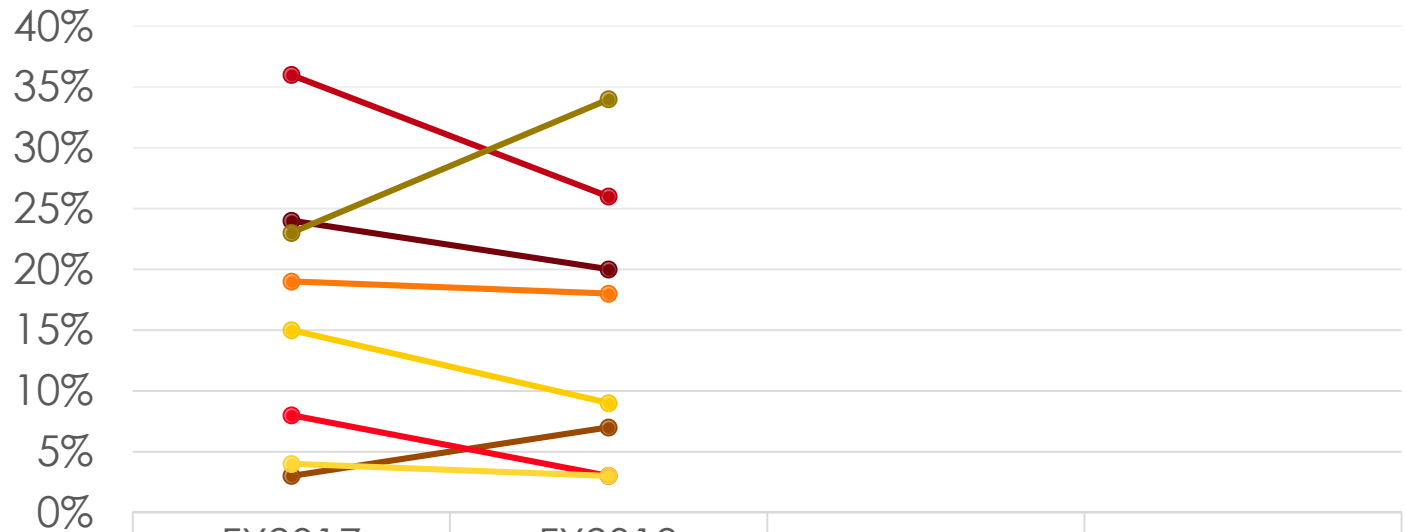
Annual Household Income - Tracking



Travel Party



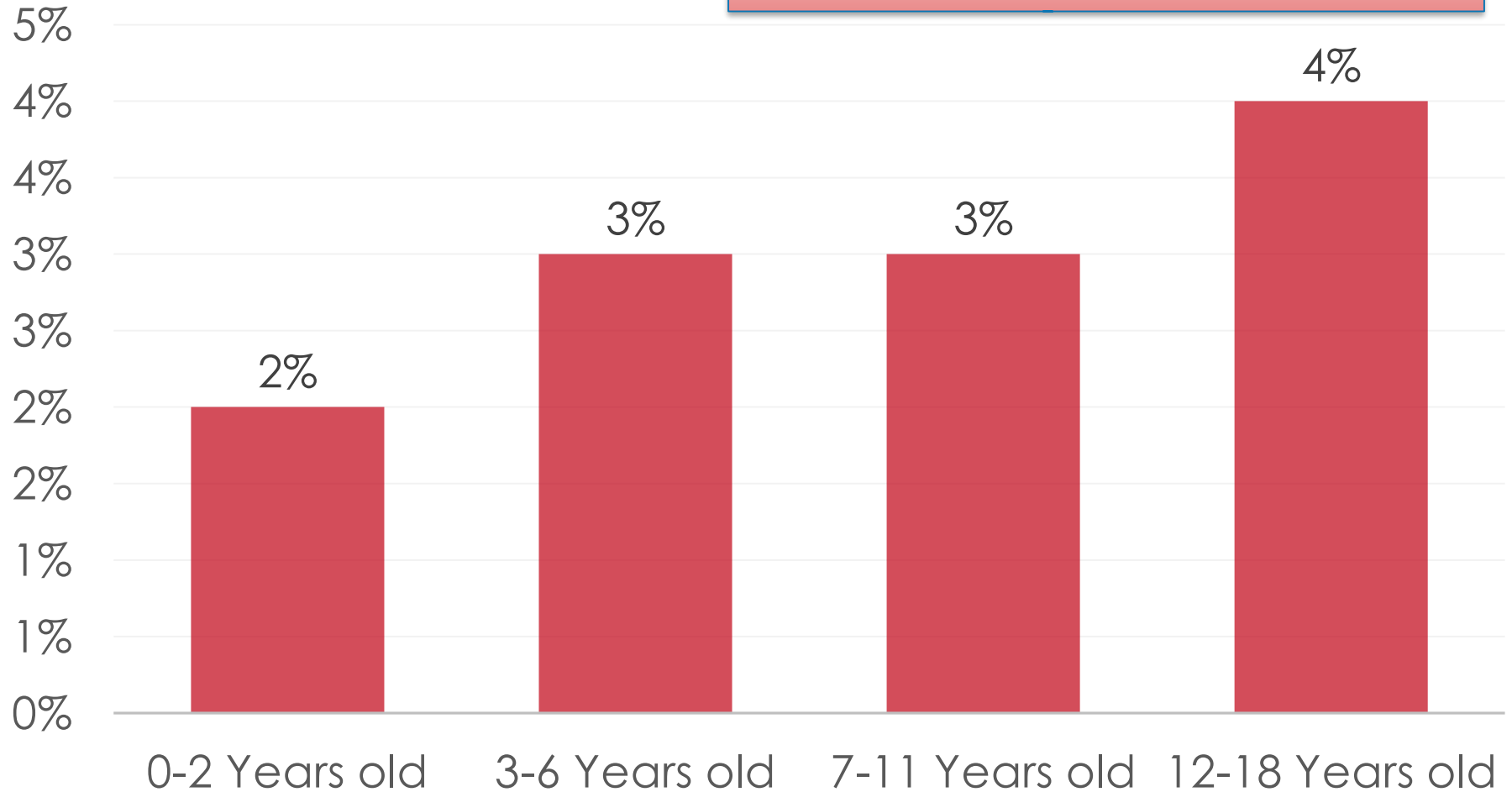
Travel Party



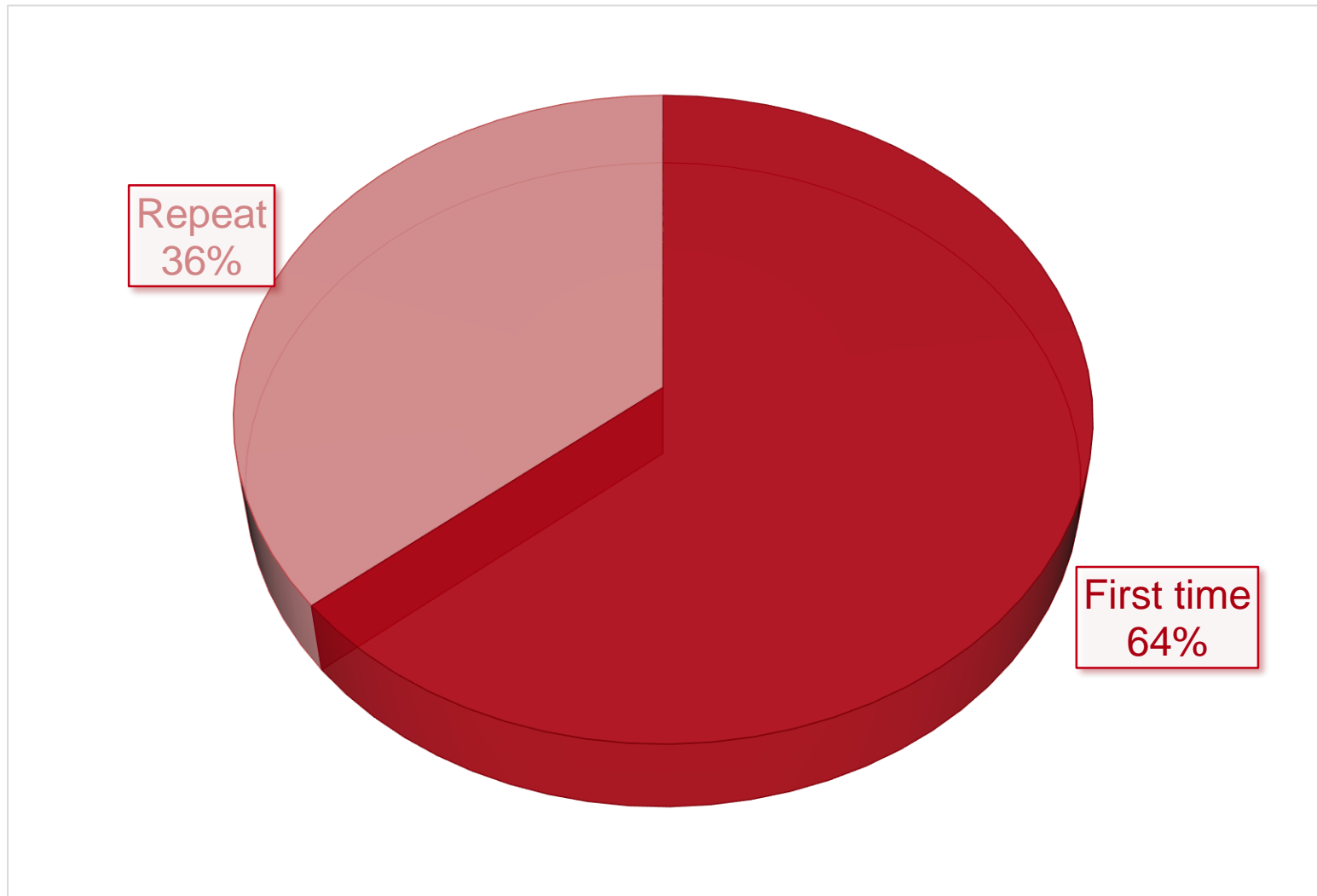
Spouse	FY2017	FY2018		
Child <18	15%	9%		
Friend/ Assoc	19%	18%		
Other Adult Family	24%	20%		
Alone	23%	34%		
Girlfriend/ Boyfriend	3%	7%		
Child- Adult	8%	3%		
Office	4%	3%		

Travel Party - Children

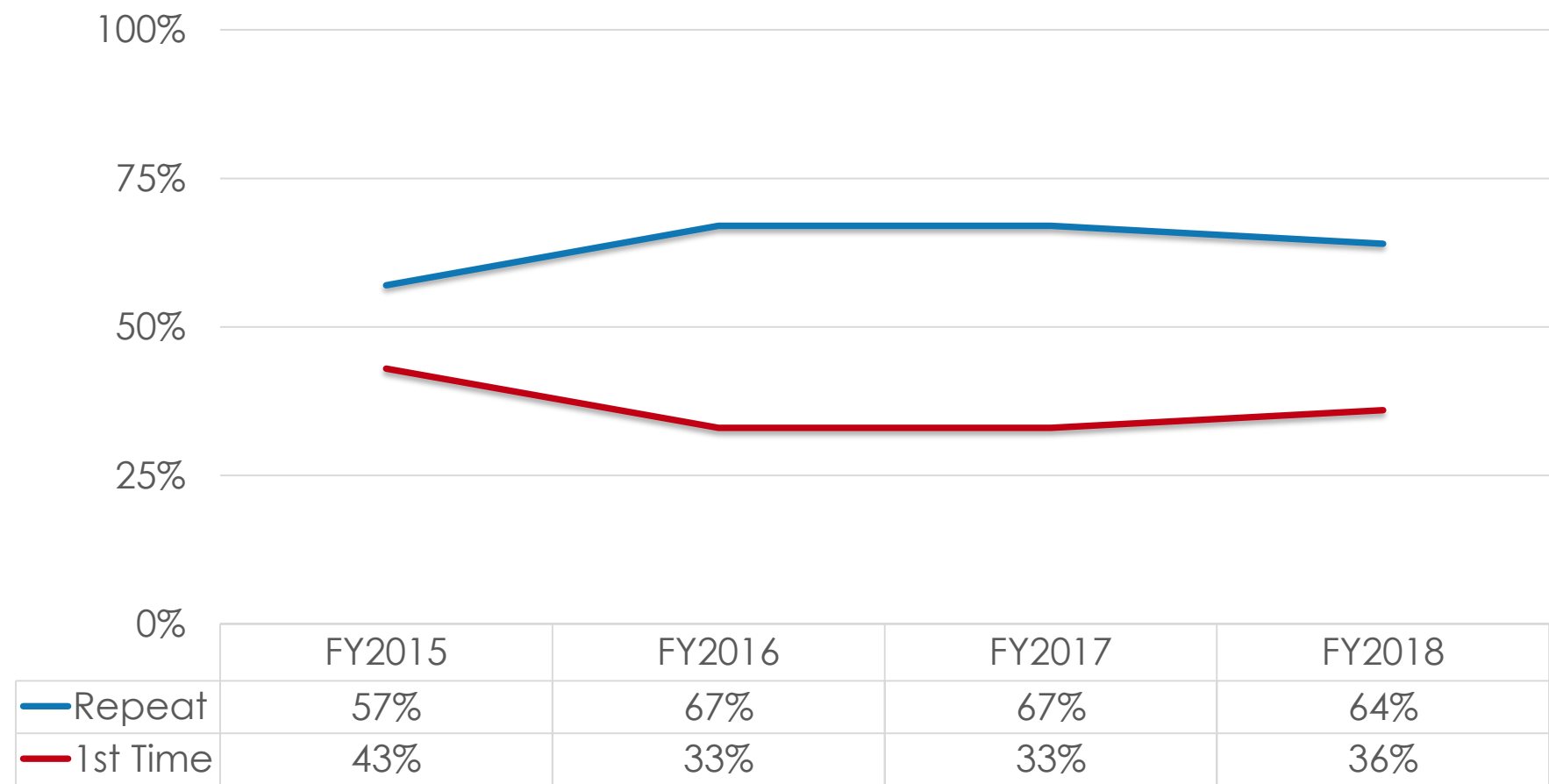
9% TRAVELING WITH A CHILD



Trips to Guam

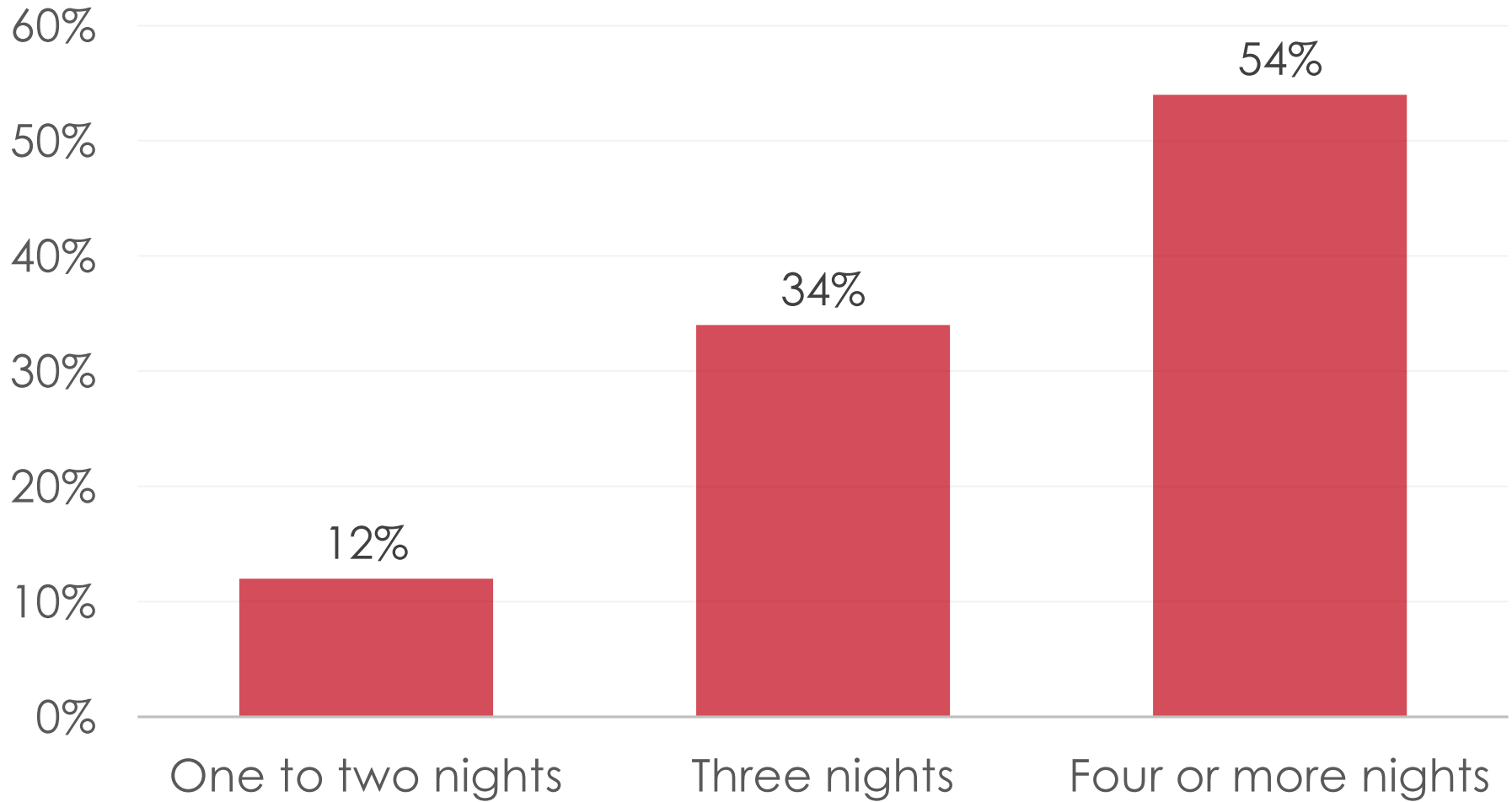


Trips to Guam – Tracking

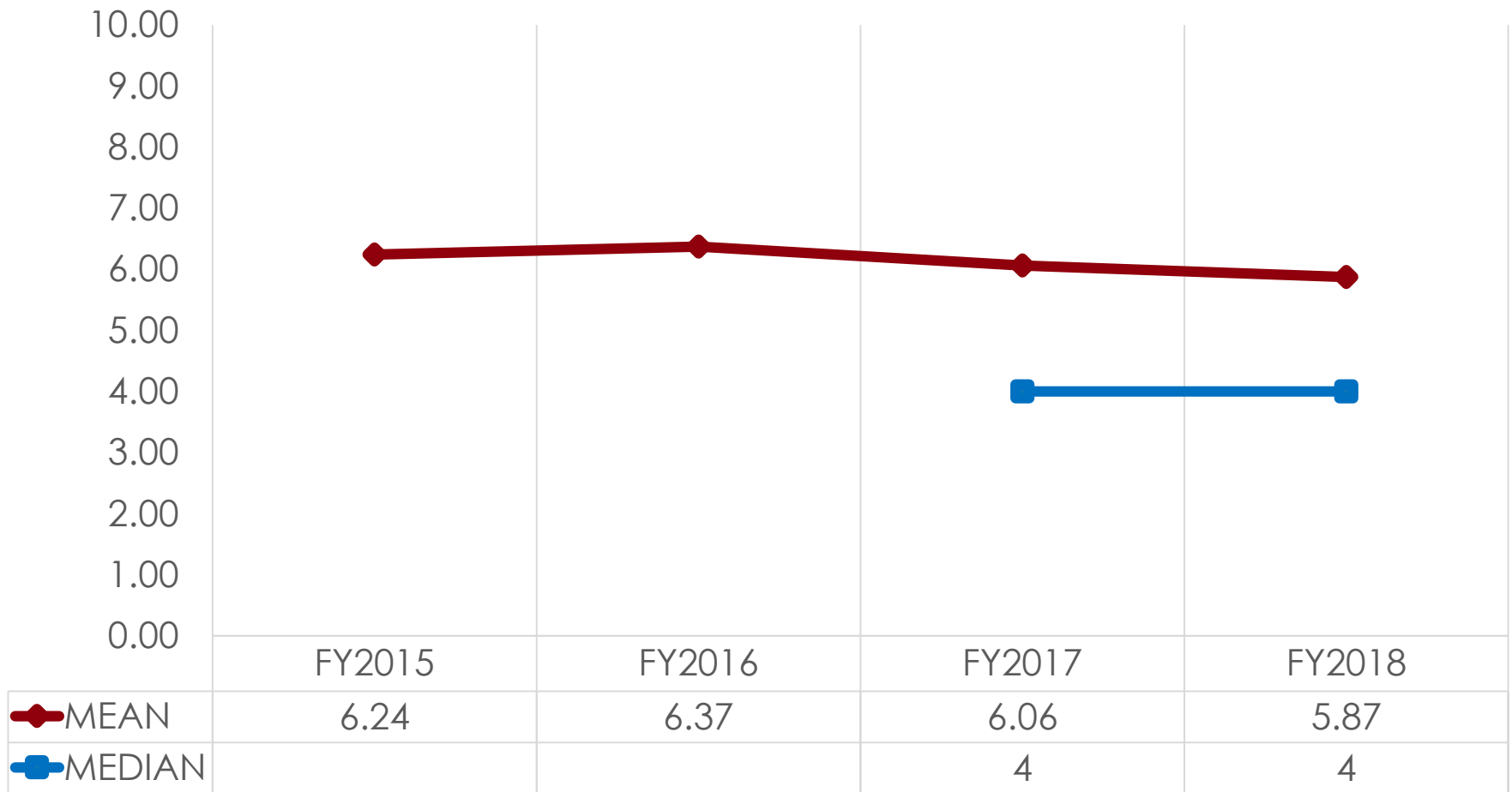


Length of Stay

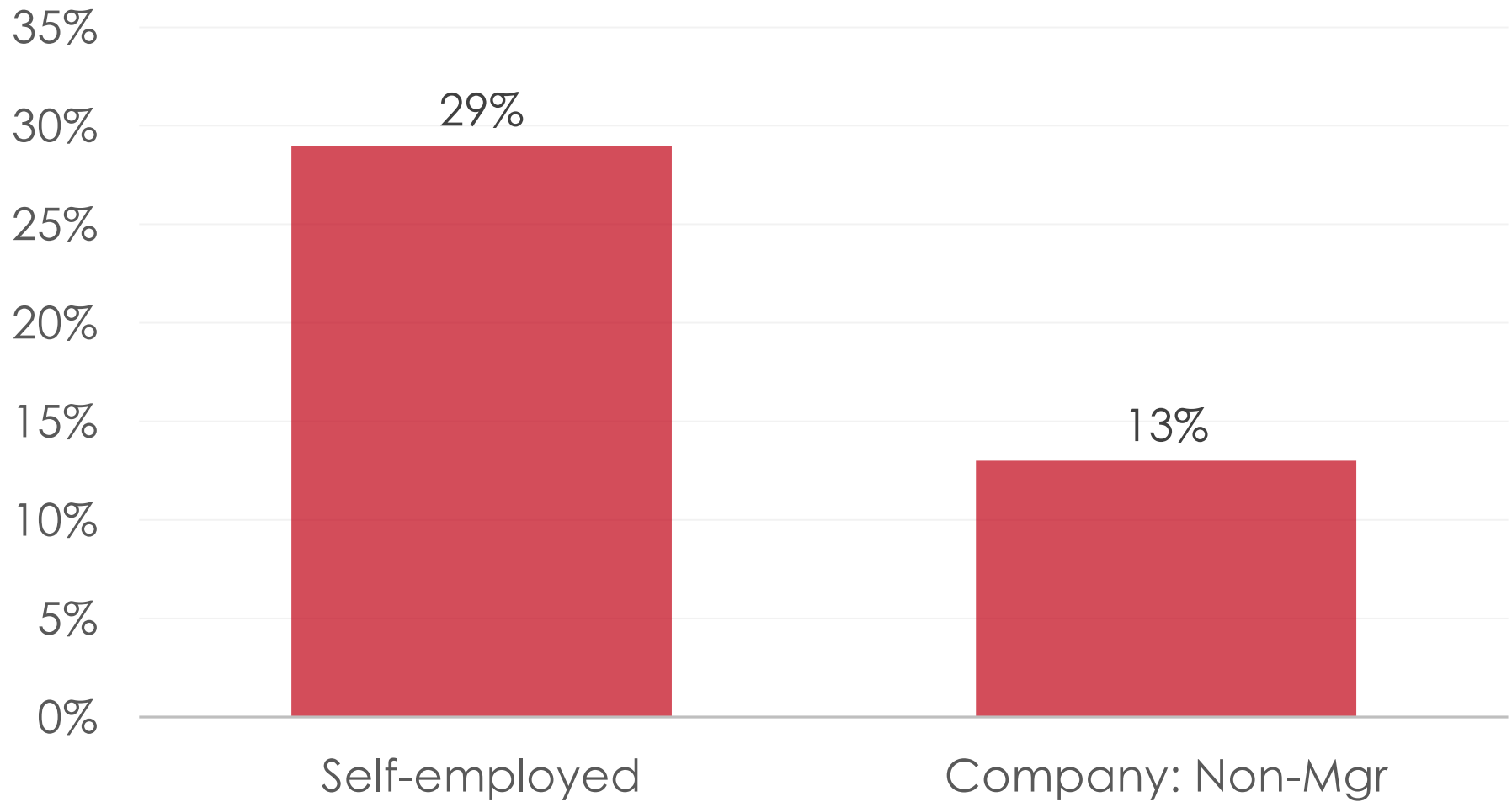
MEAN NUMBER OF NIGHTS = 5.87
MEDIAN NUMBER OF NIGHTS = 4



Length of Stay – Tracking



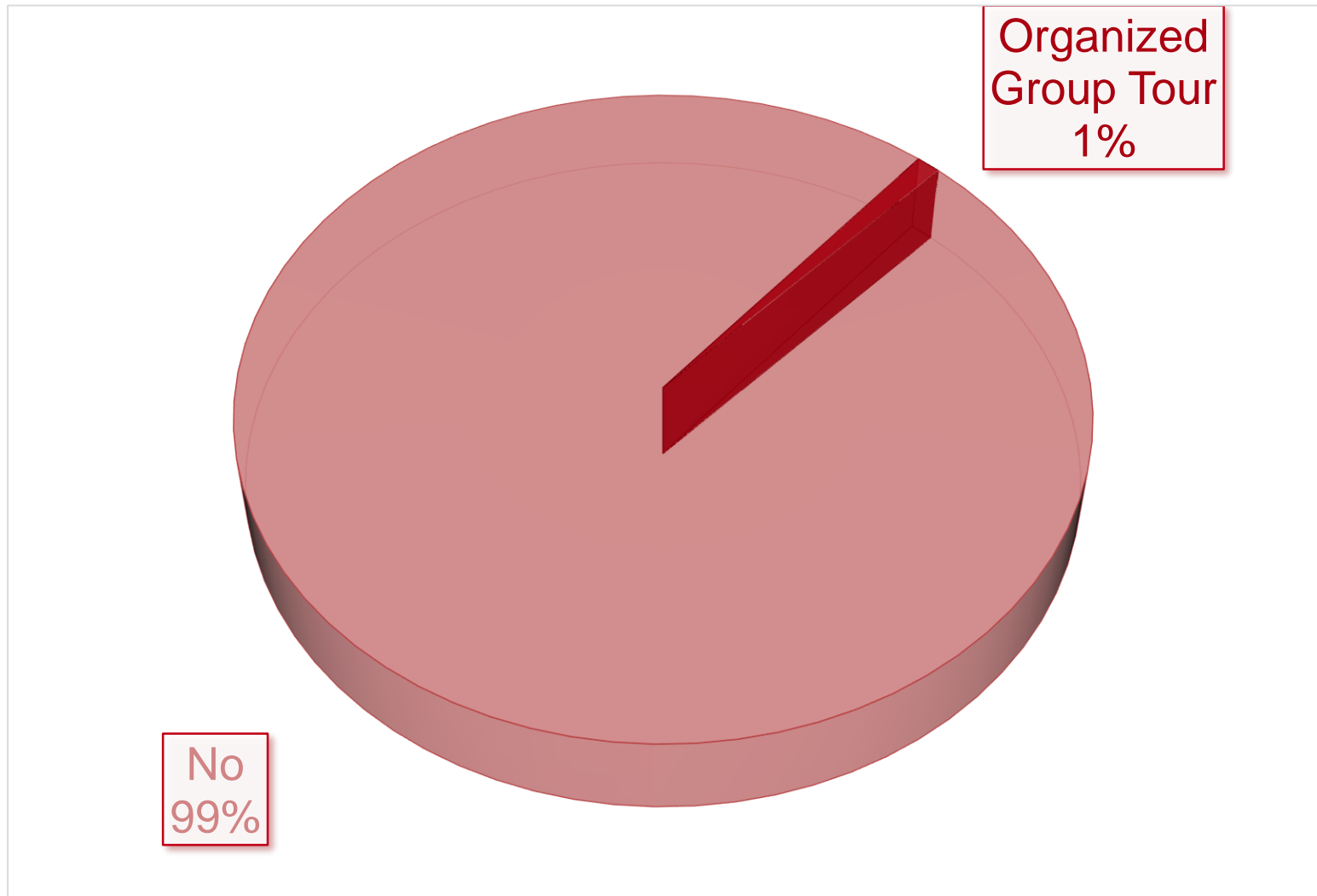
Occupation – Top Responses (10%+)



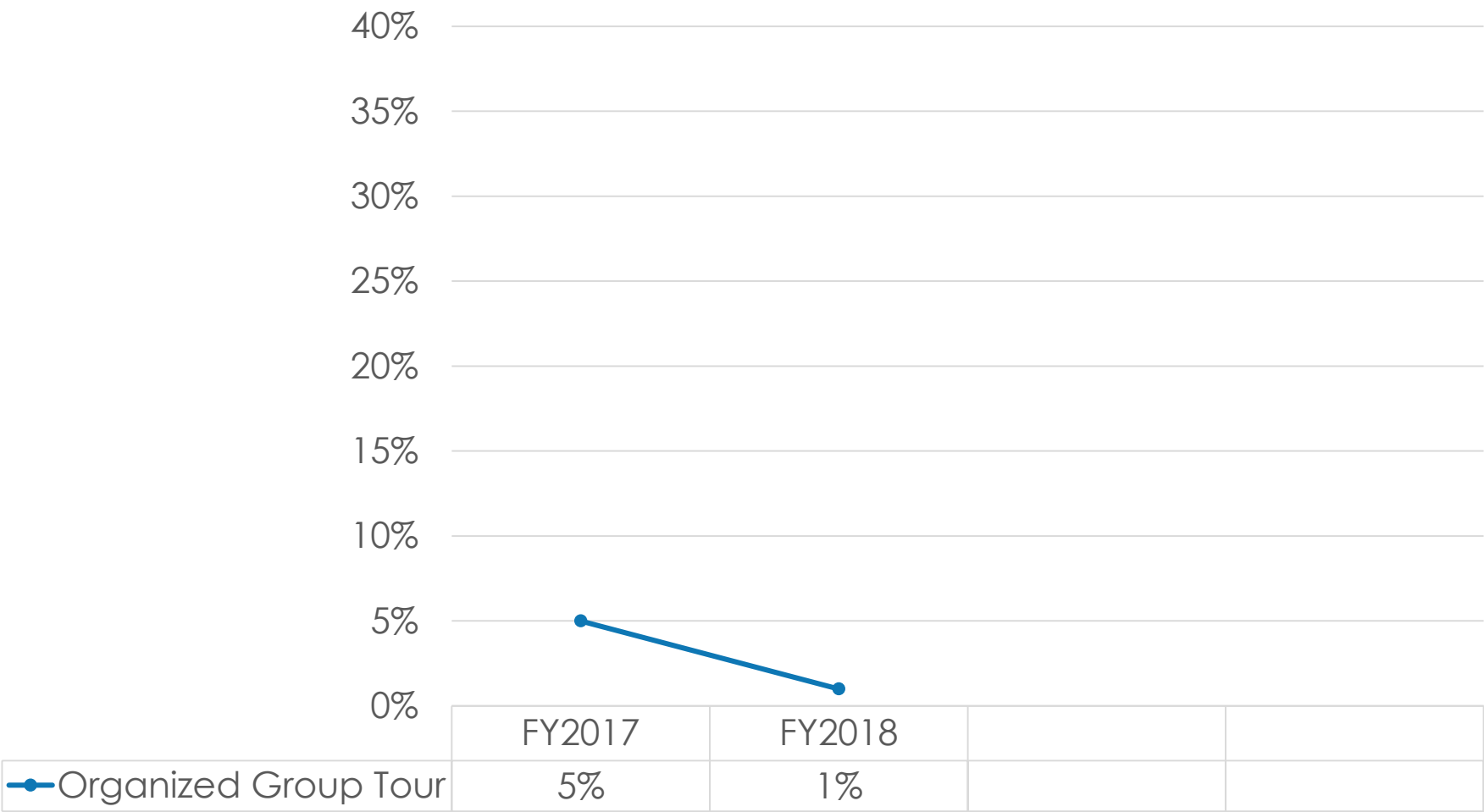
SECTION 2

TRAVEL PLANNING

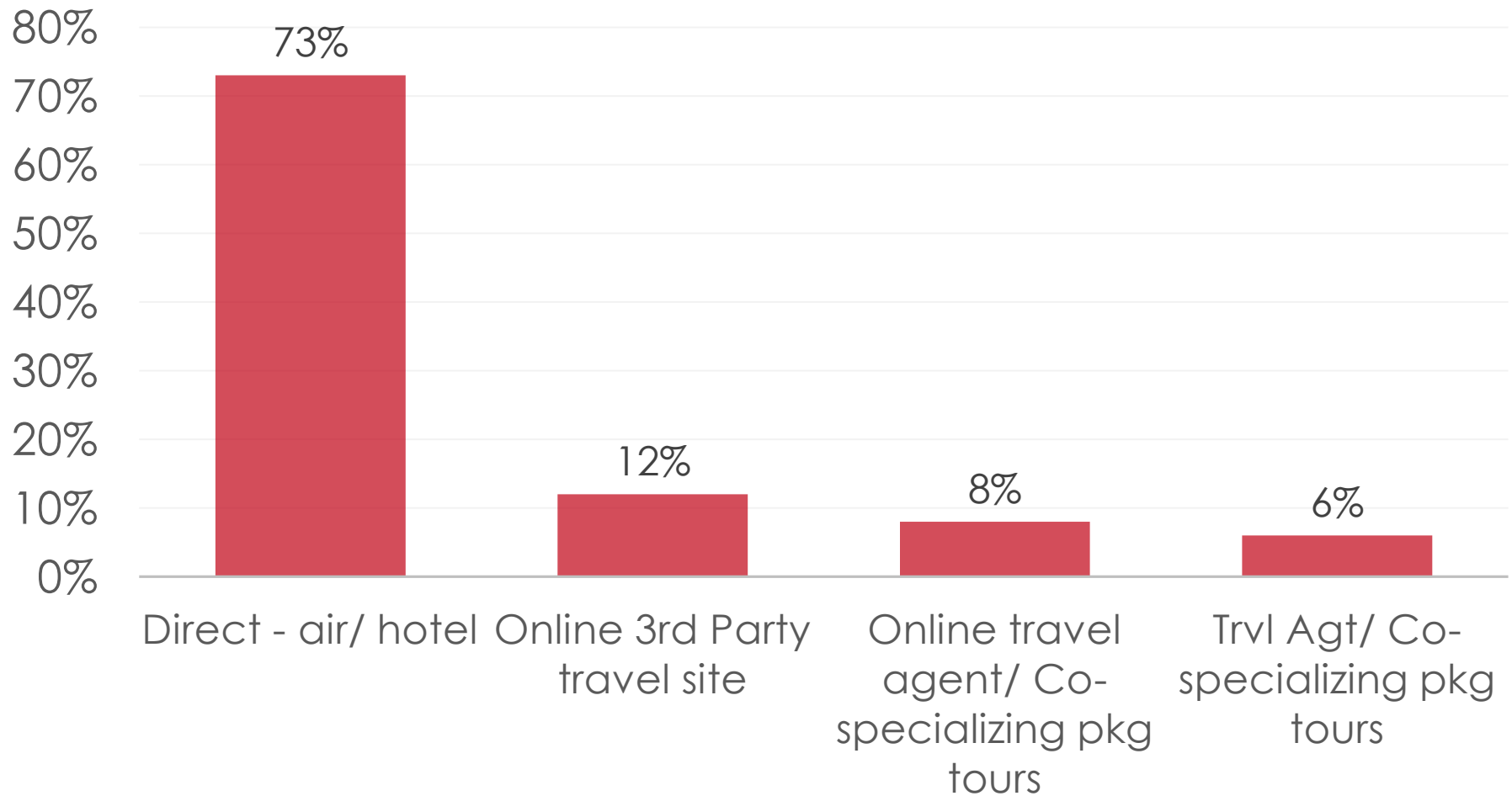
Organized Group Tour



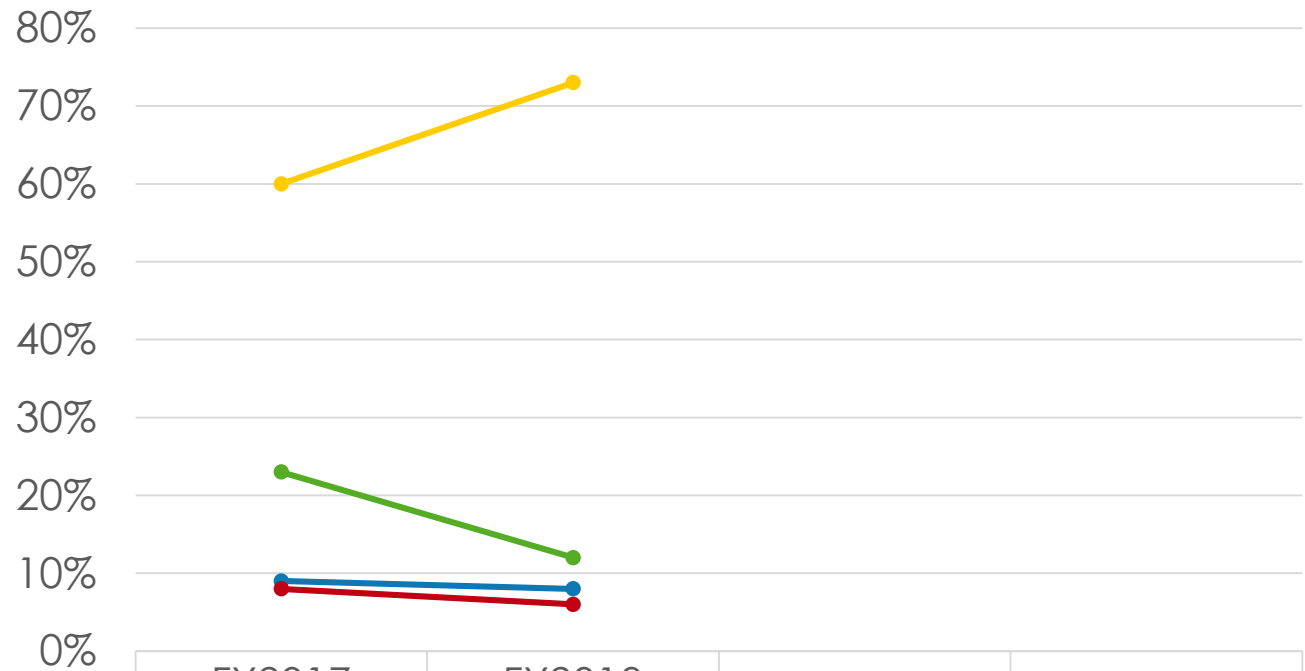
Organized Group Tour



Travel Arrangements

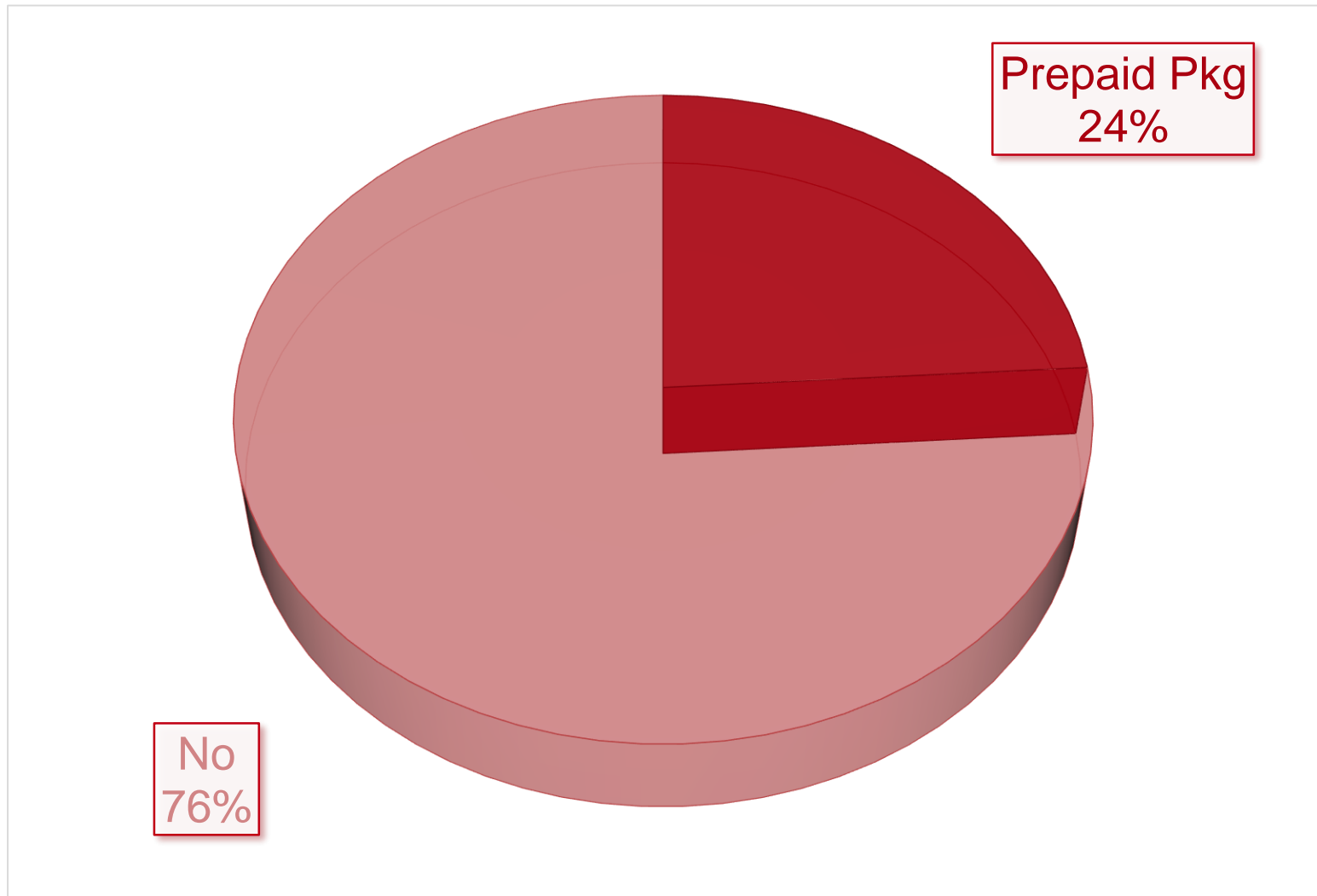


Travel Arrangements

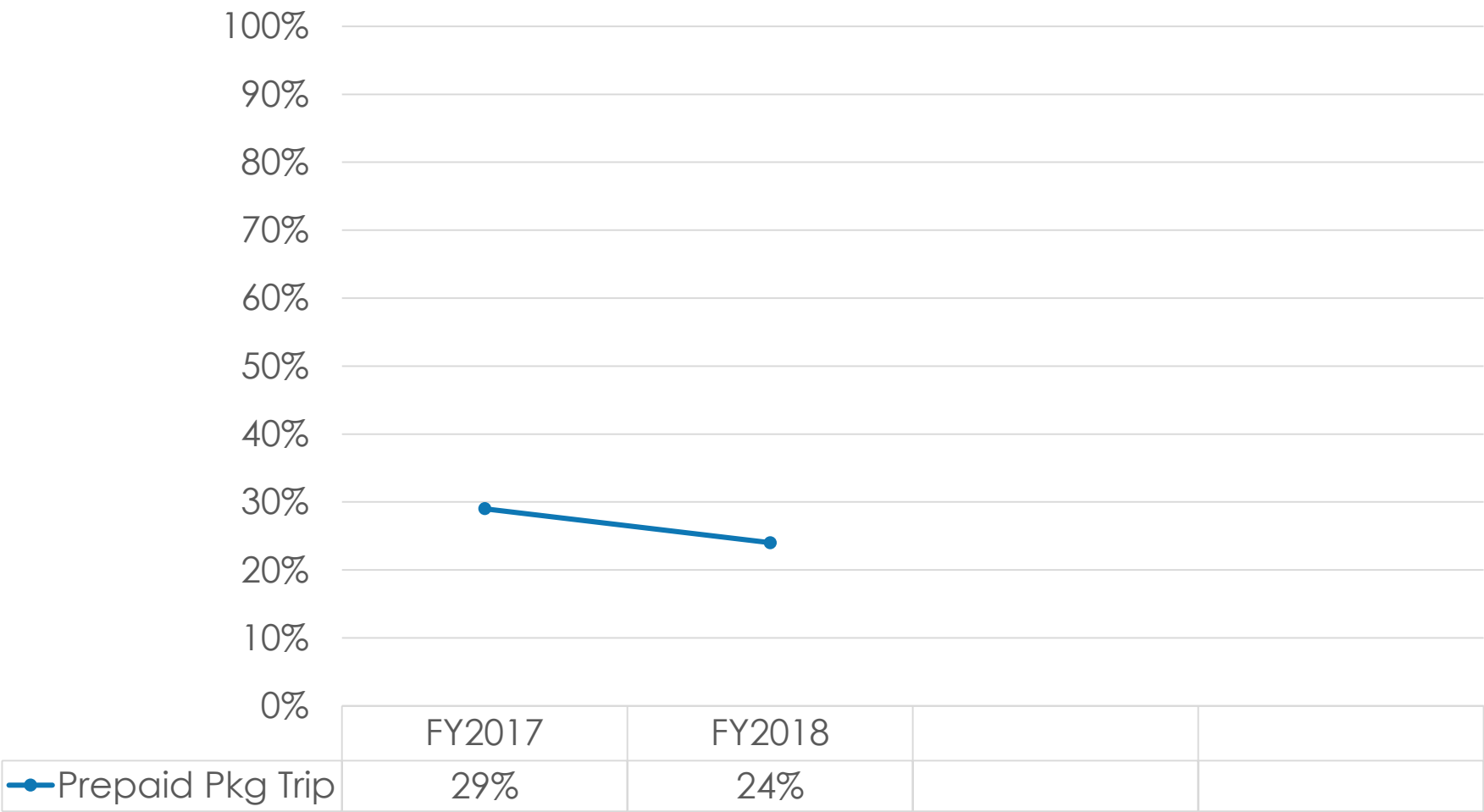


	FY2017	FY2018		
Online travel agent	9%	8%		
Trvl Agt/ Co- Pkg Tour	8%	6%		
Online 3rd Party	23%	12%		
Direct Air/ Hotel	60%	73%		

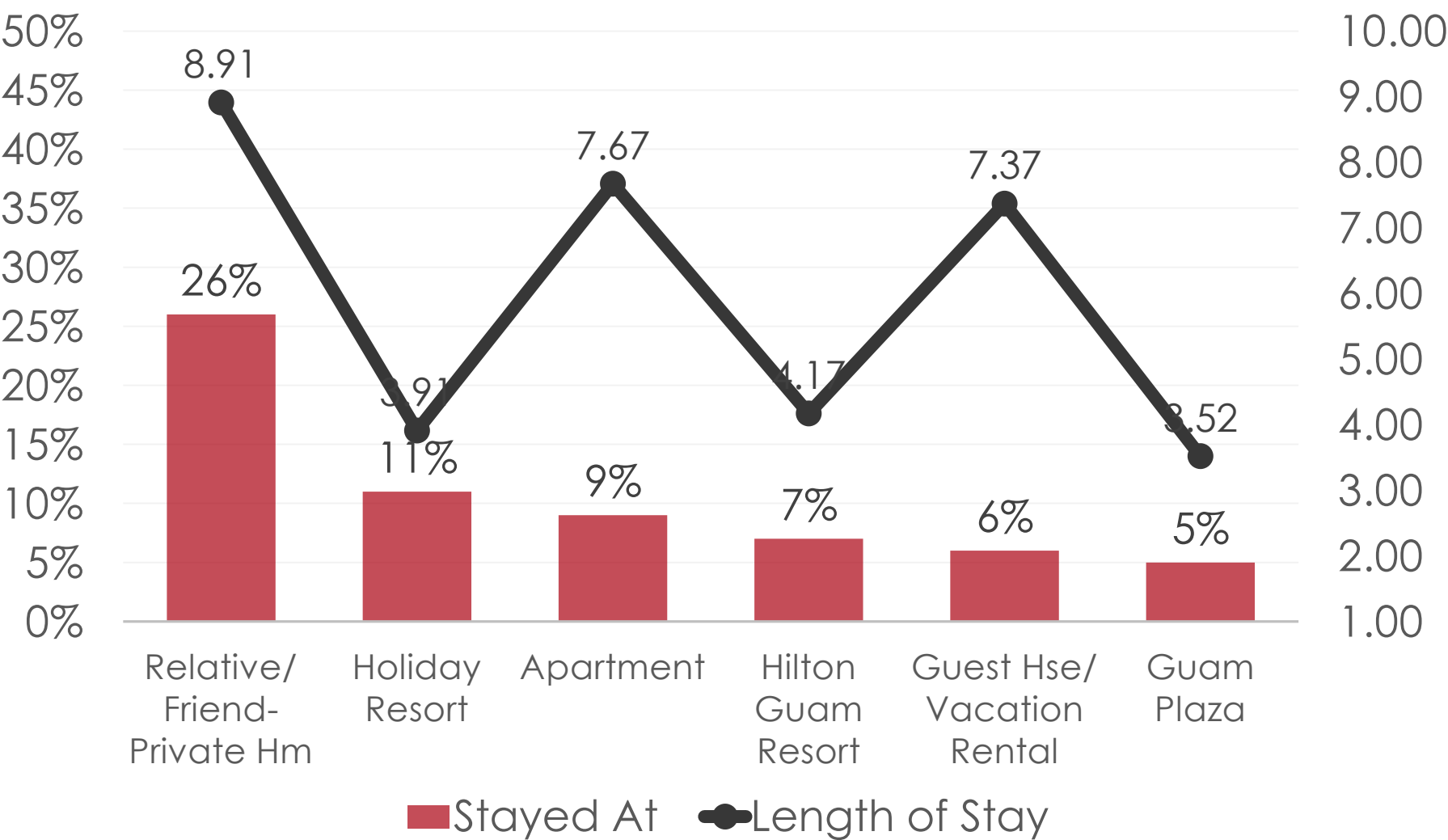
Prepaid Package Trip



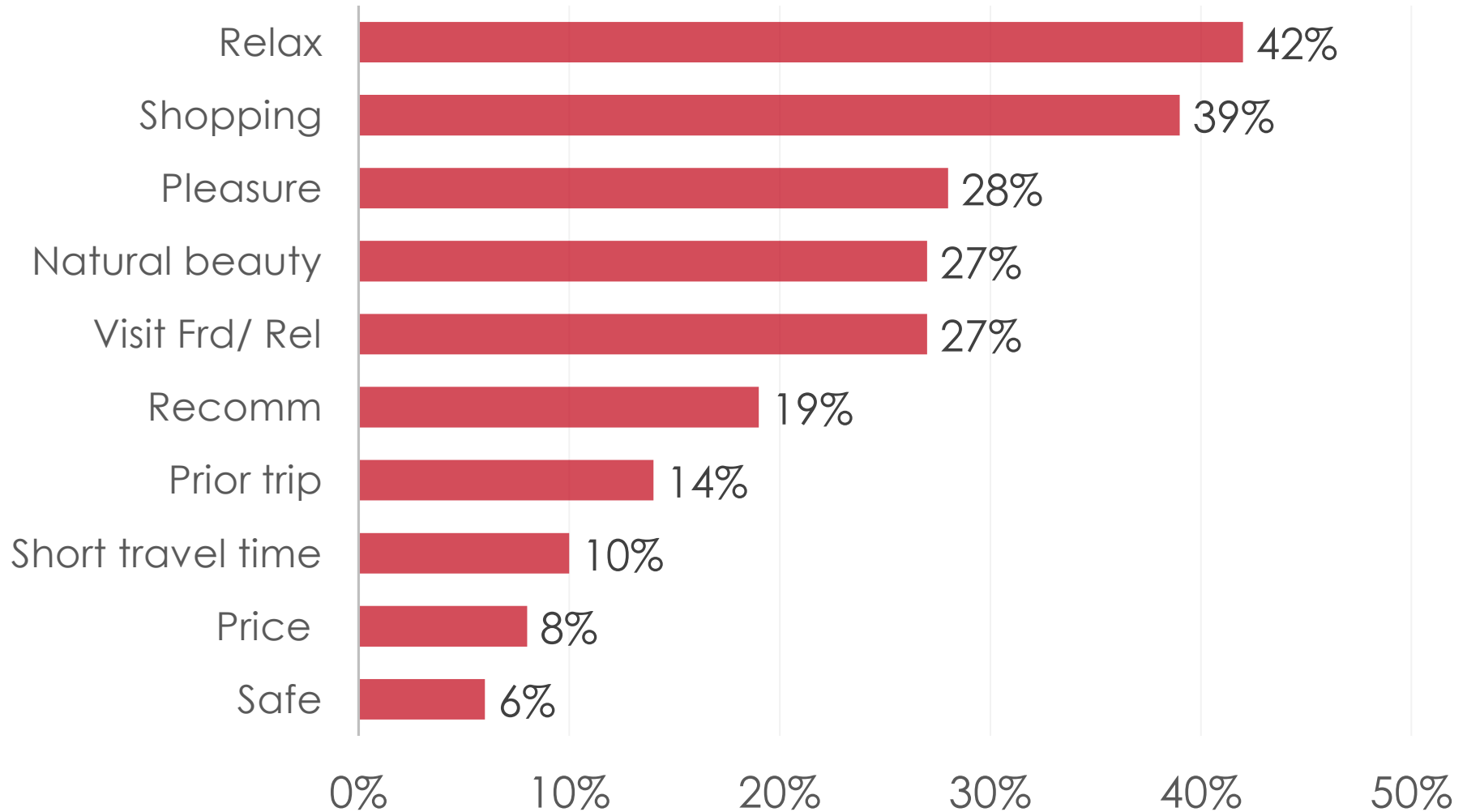
Prepaid Package Trip



Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Top 3

FY2015	FY2016	FY2017	FY2018
23% Visit friend/ relative 19% Shopping 12% Relax	18% Visit friend/ relative 18% Shopping 15% Relax	51% Shopping 41% Relax 37% Pleasure/ Vacation	42% Relax 39% Shopping 28% Pleasure/ Vacation

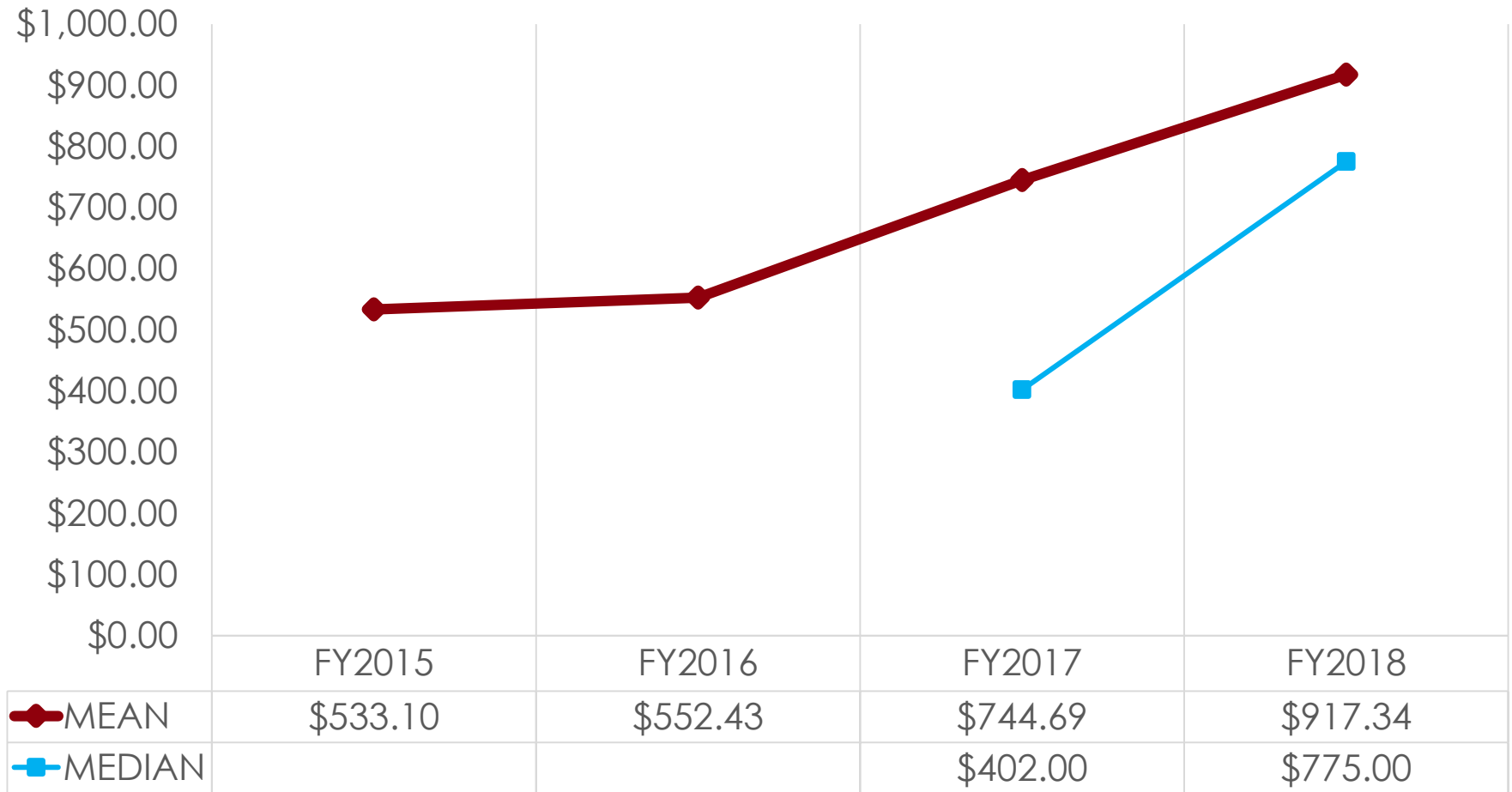
SECTION 3

EXPENDITURES

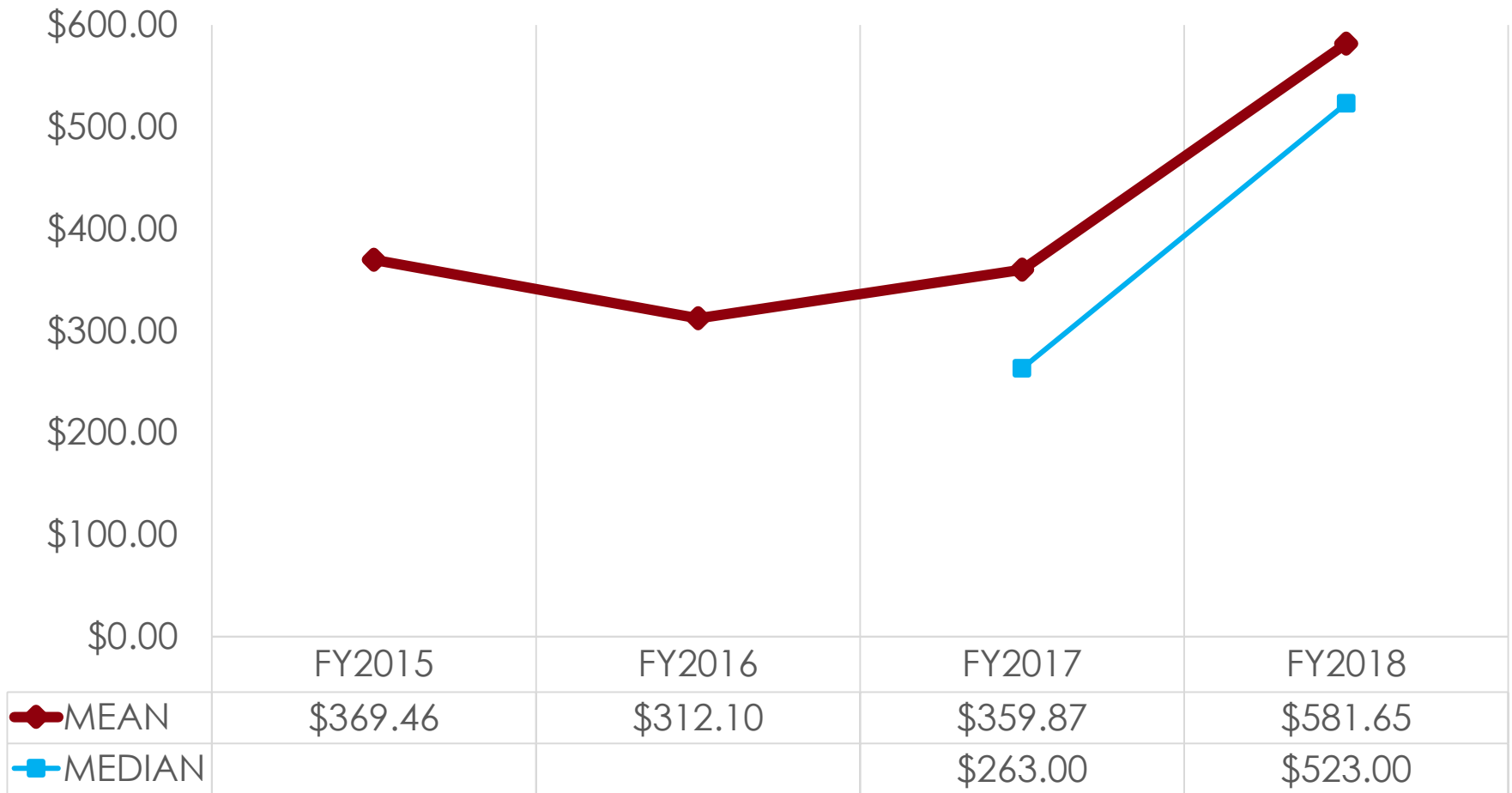
Prepaid Expenditures

- \$917.34 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$581.65 = overall mean average per person prepaid expenditures

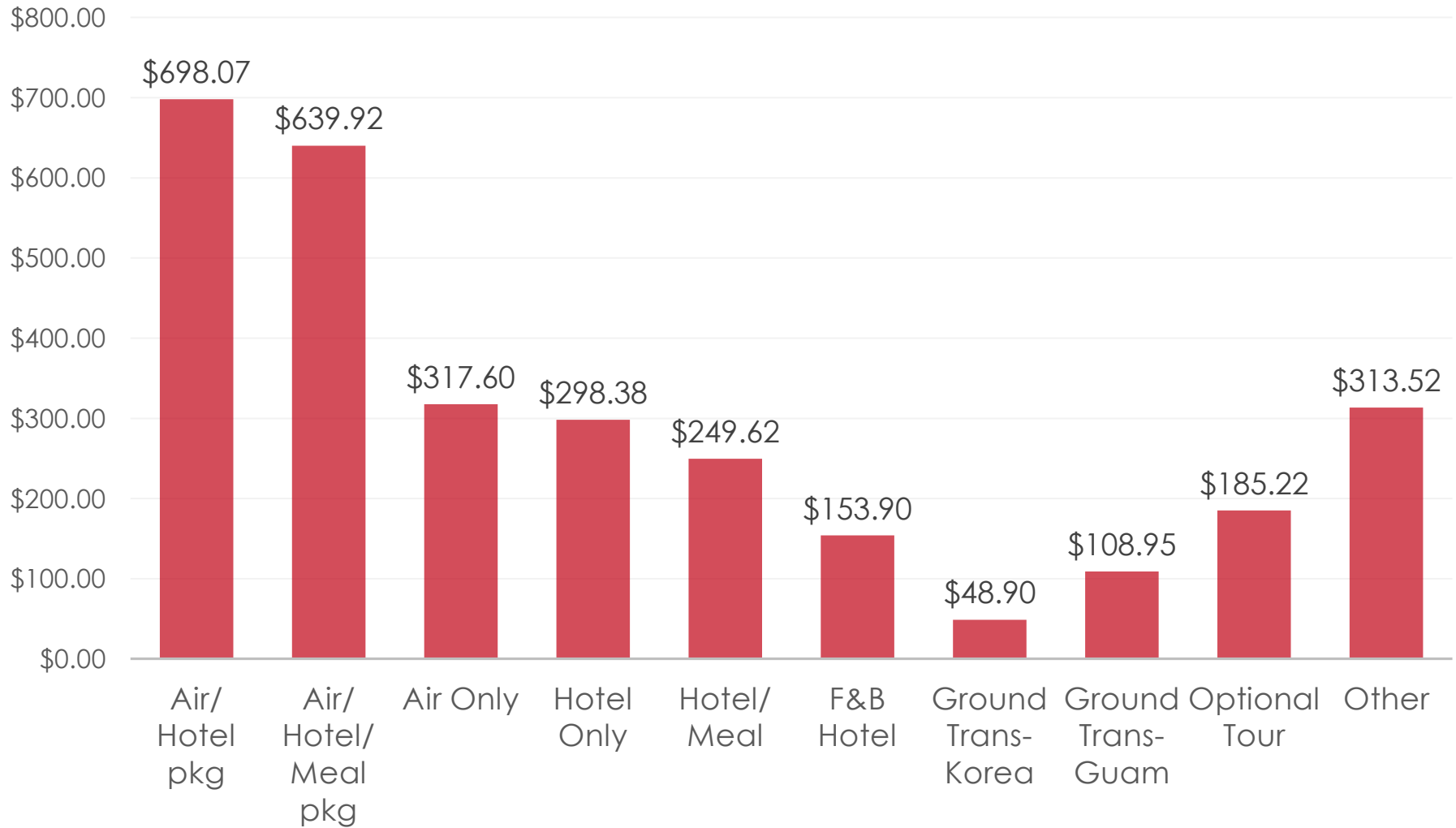
Prepaid Entire Travel Party – Tracking



Prepaid Per Person – Tracking

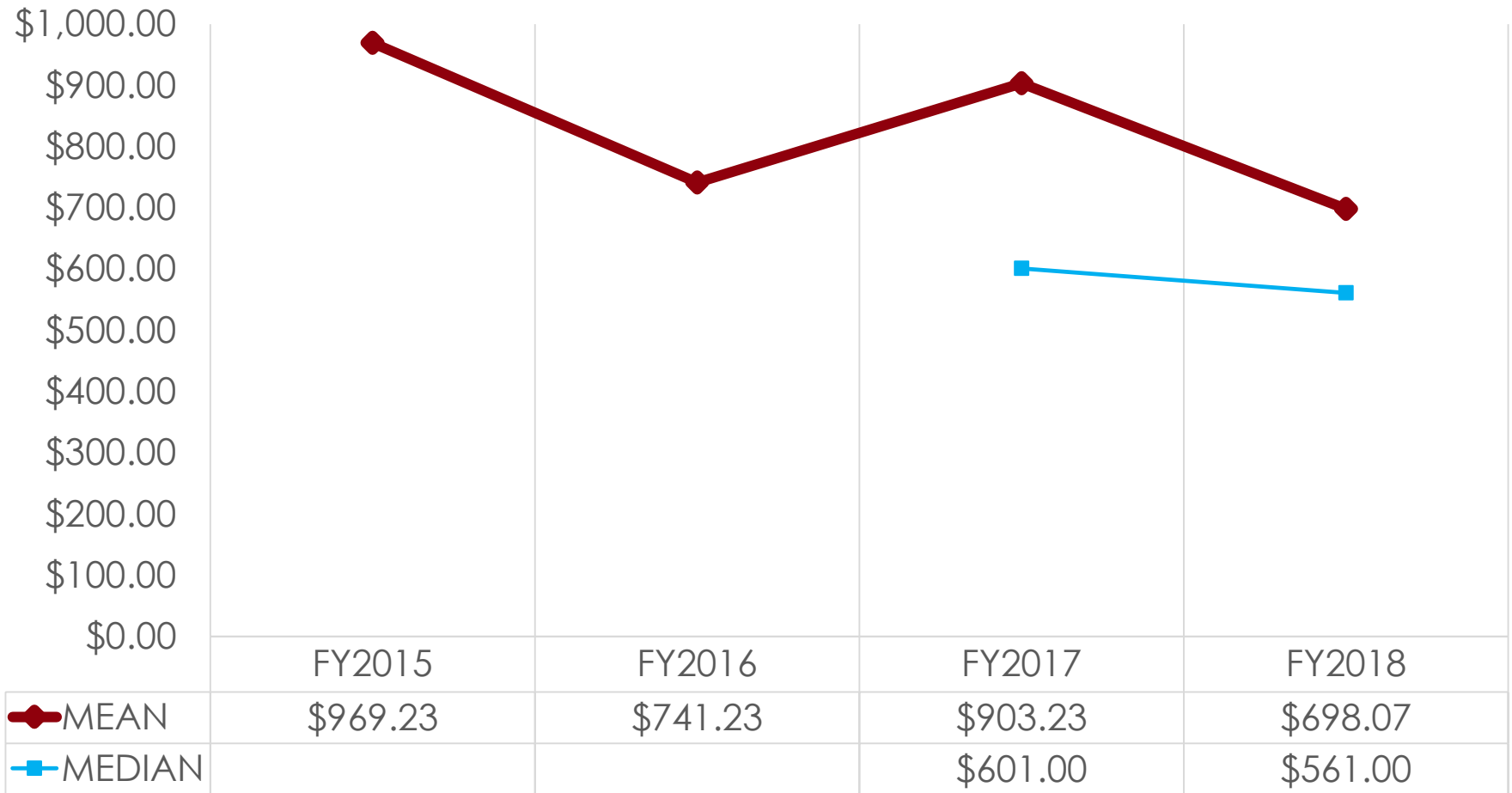


Prepaid Expenses by Category – Mean Entire Travel Party



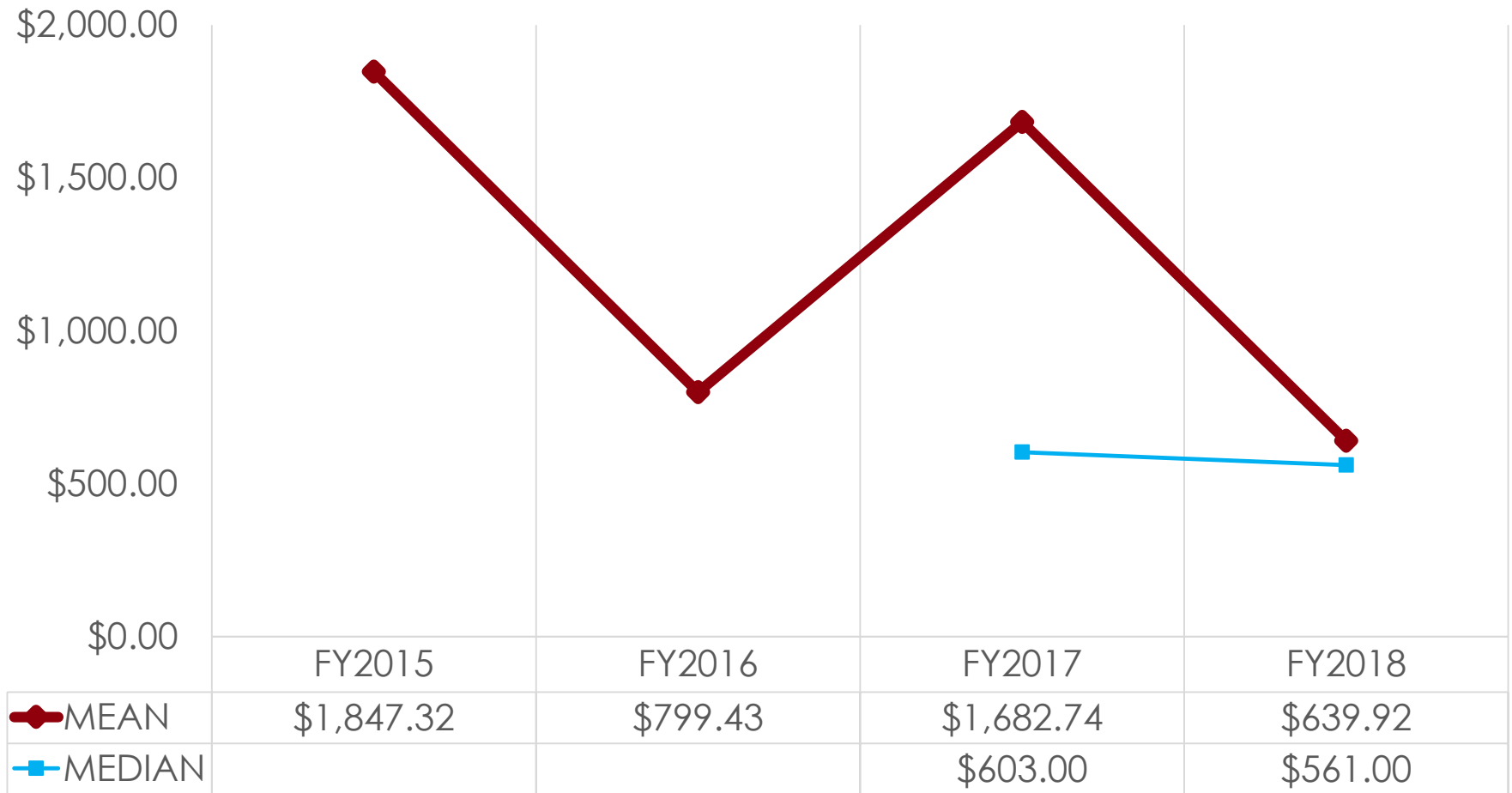
Prepaid – Tracking

Airfare & Accommodation Packages



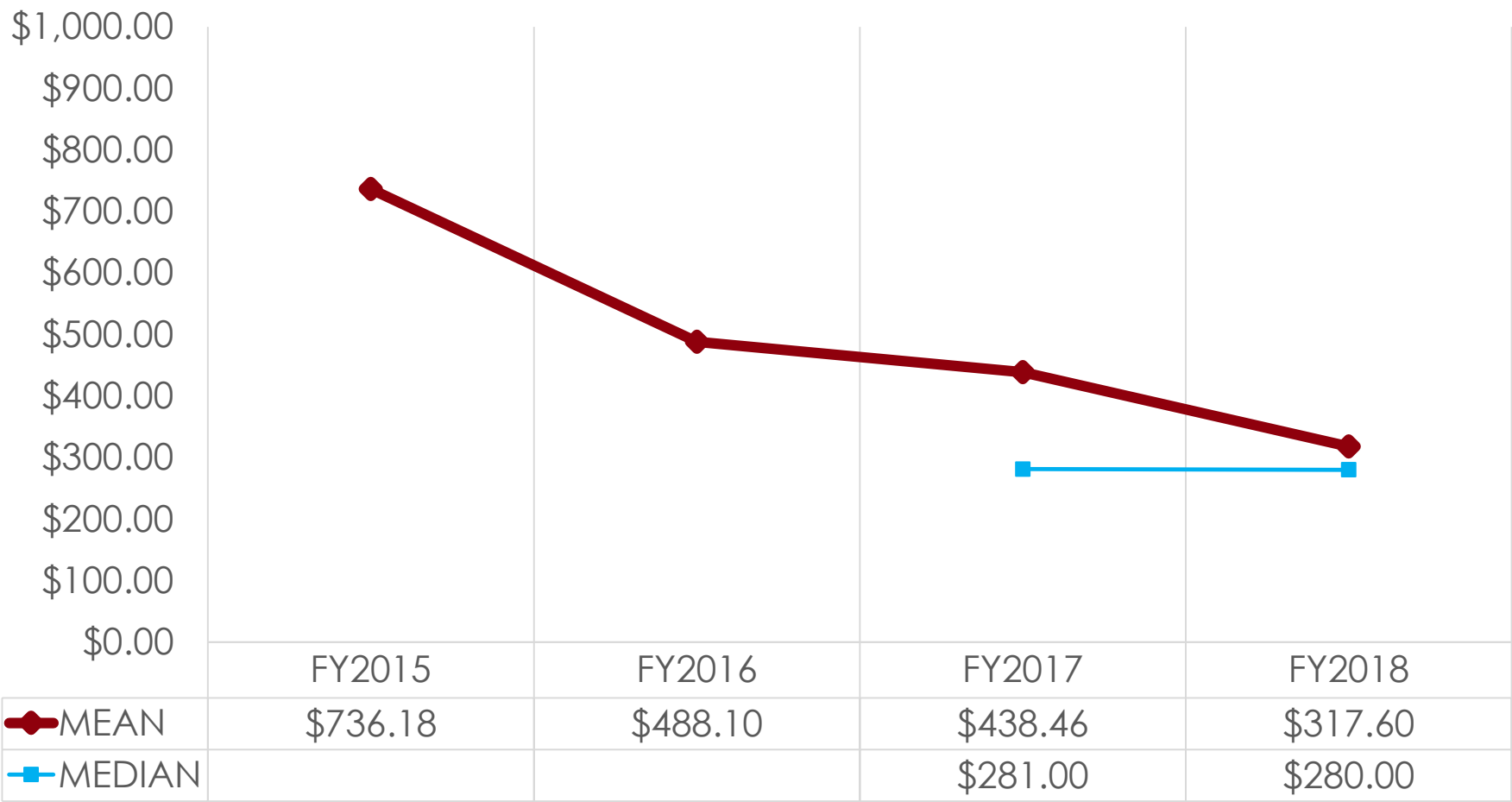
Prepaid – Tracking

Airfare & Accommodation W/ Meal Packages

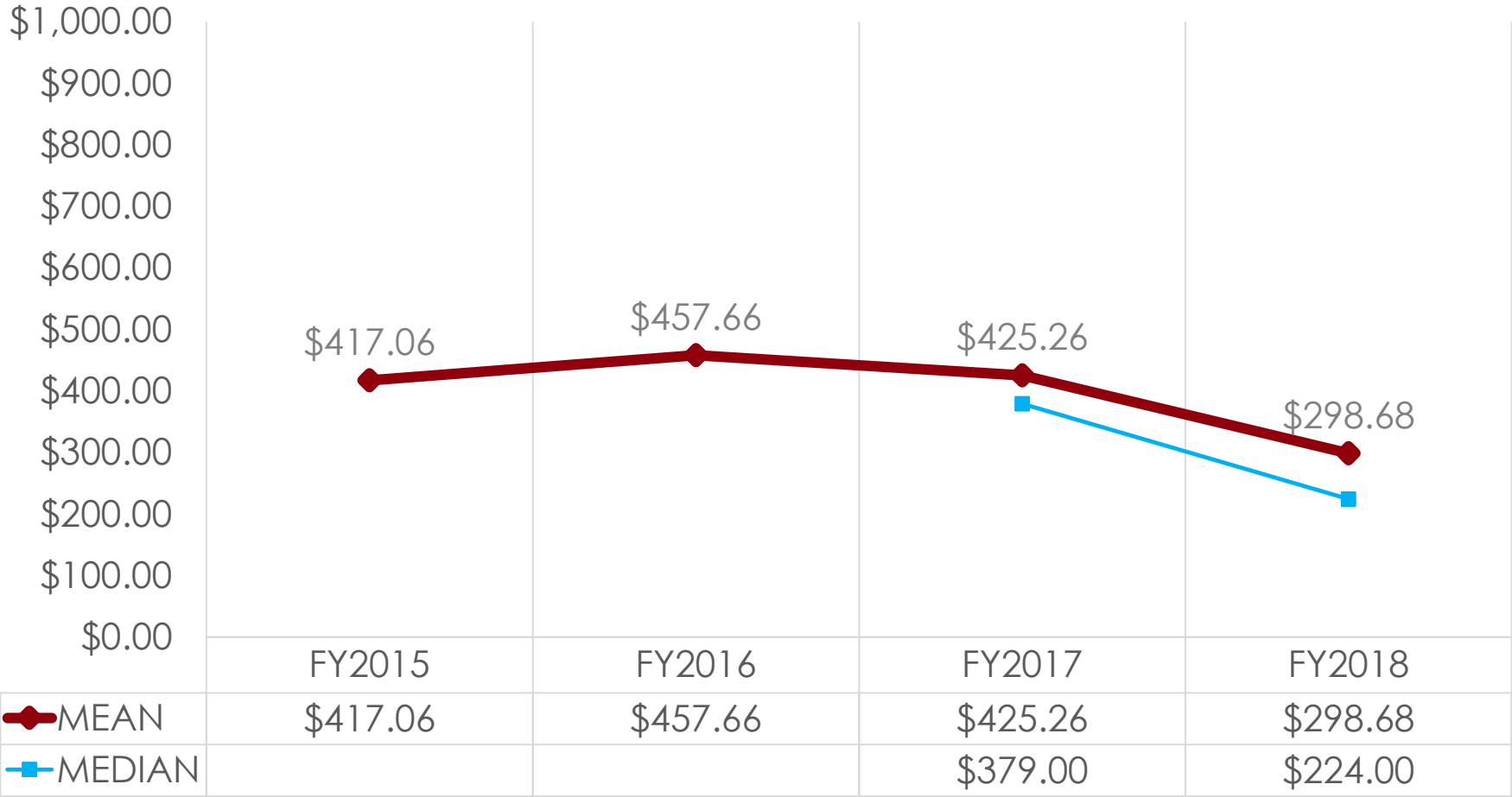


Prepaid – Tracking

Airfare Only

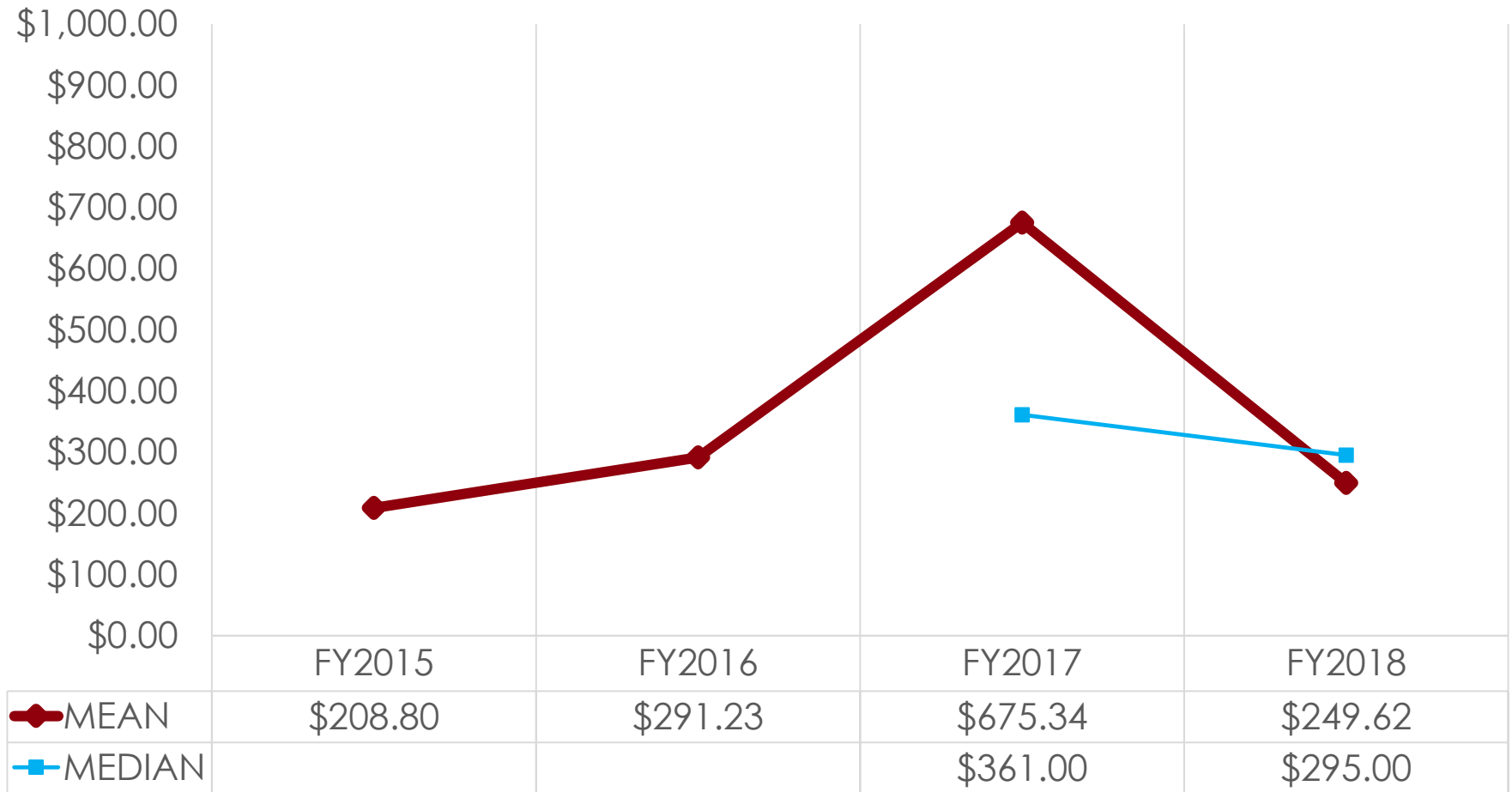


Prepaid – Tracking Accommodations Only

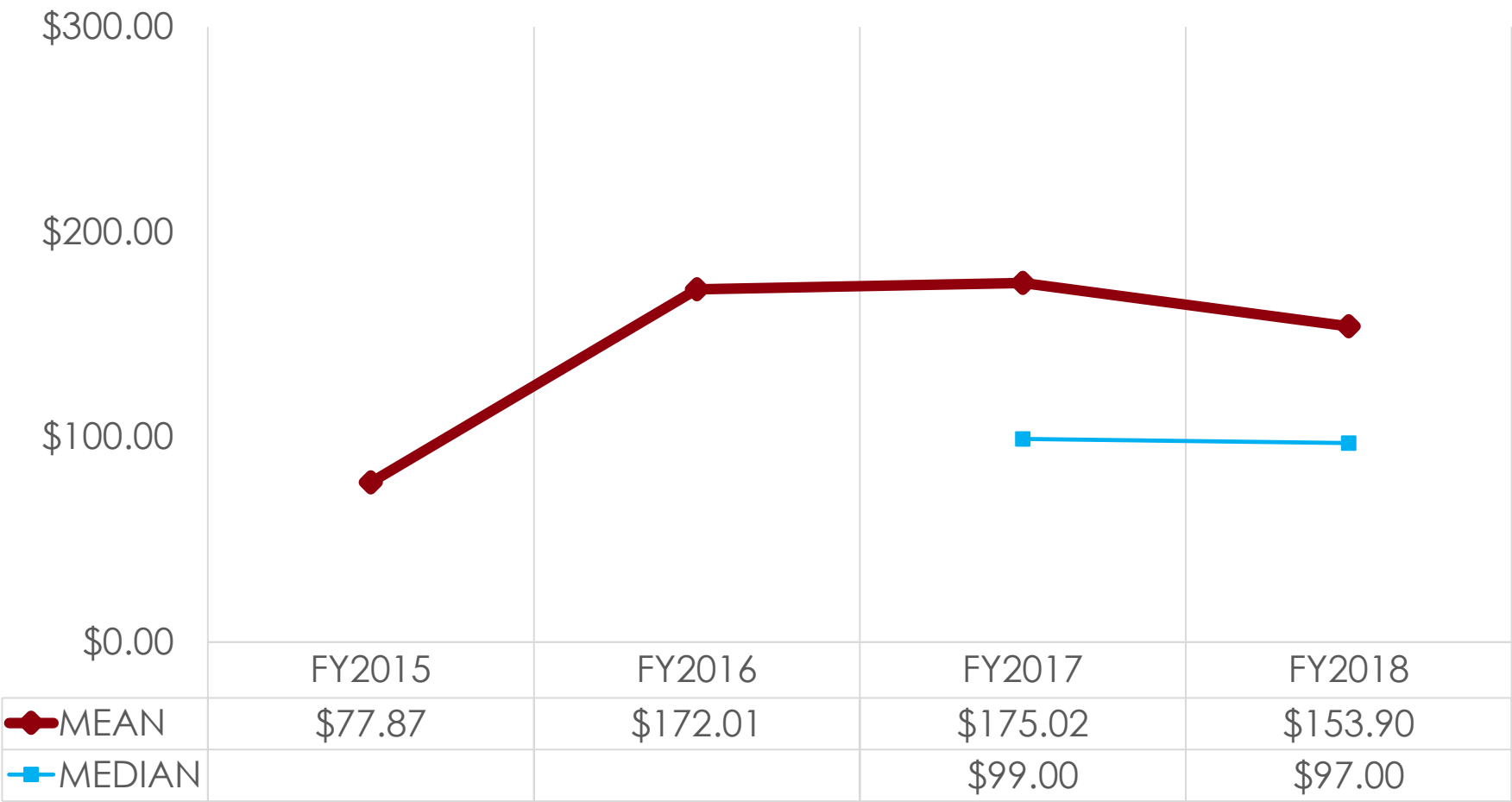


Prepaid – Tracking

Accommodations w/ Meal Only

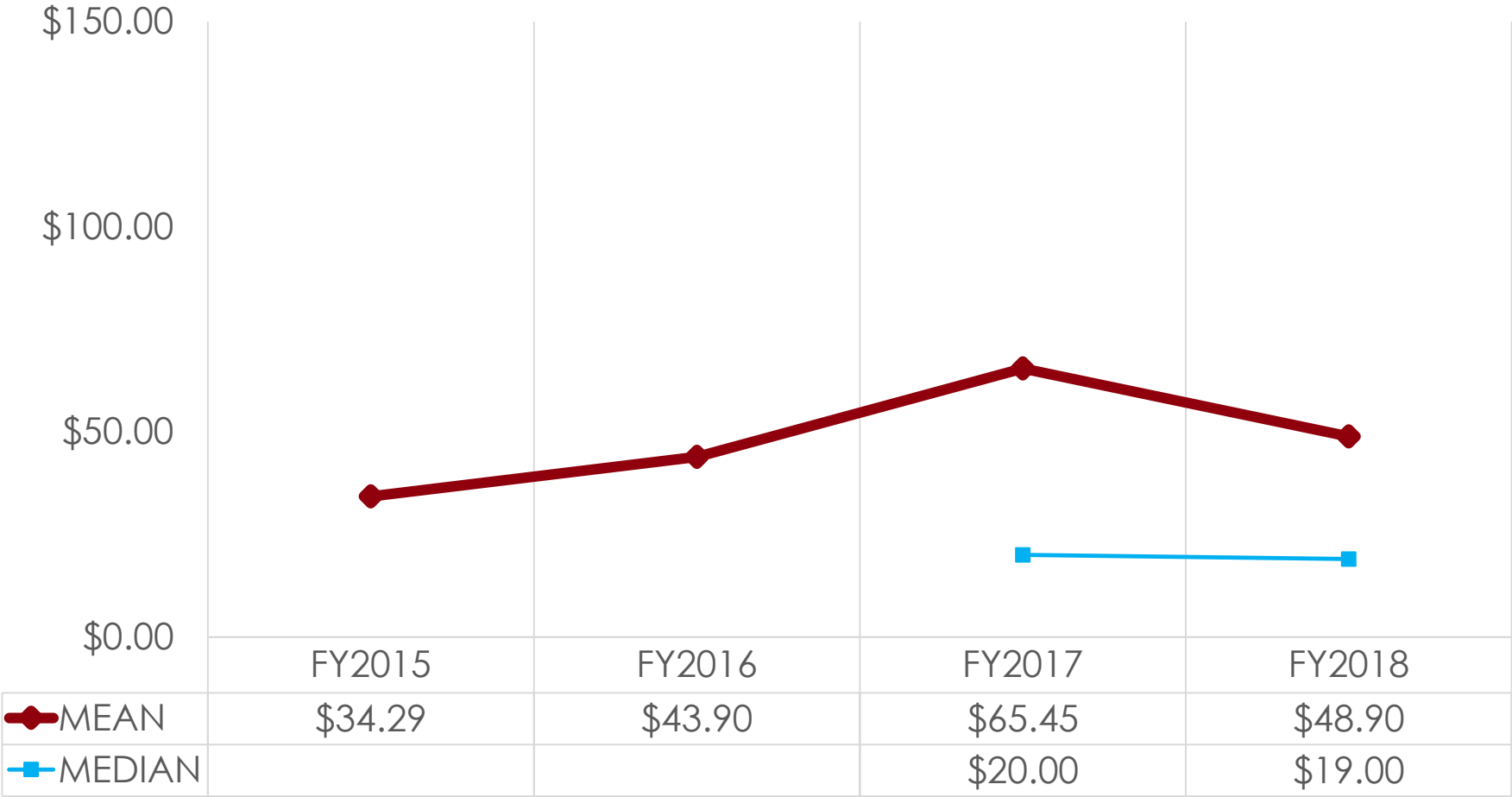


Prepaid – Tracking Food & Beverage in Hotel



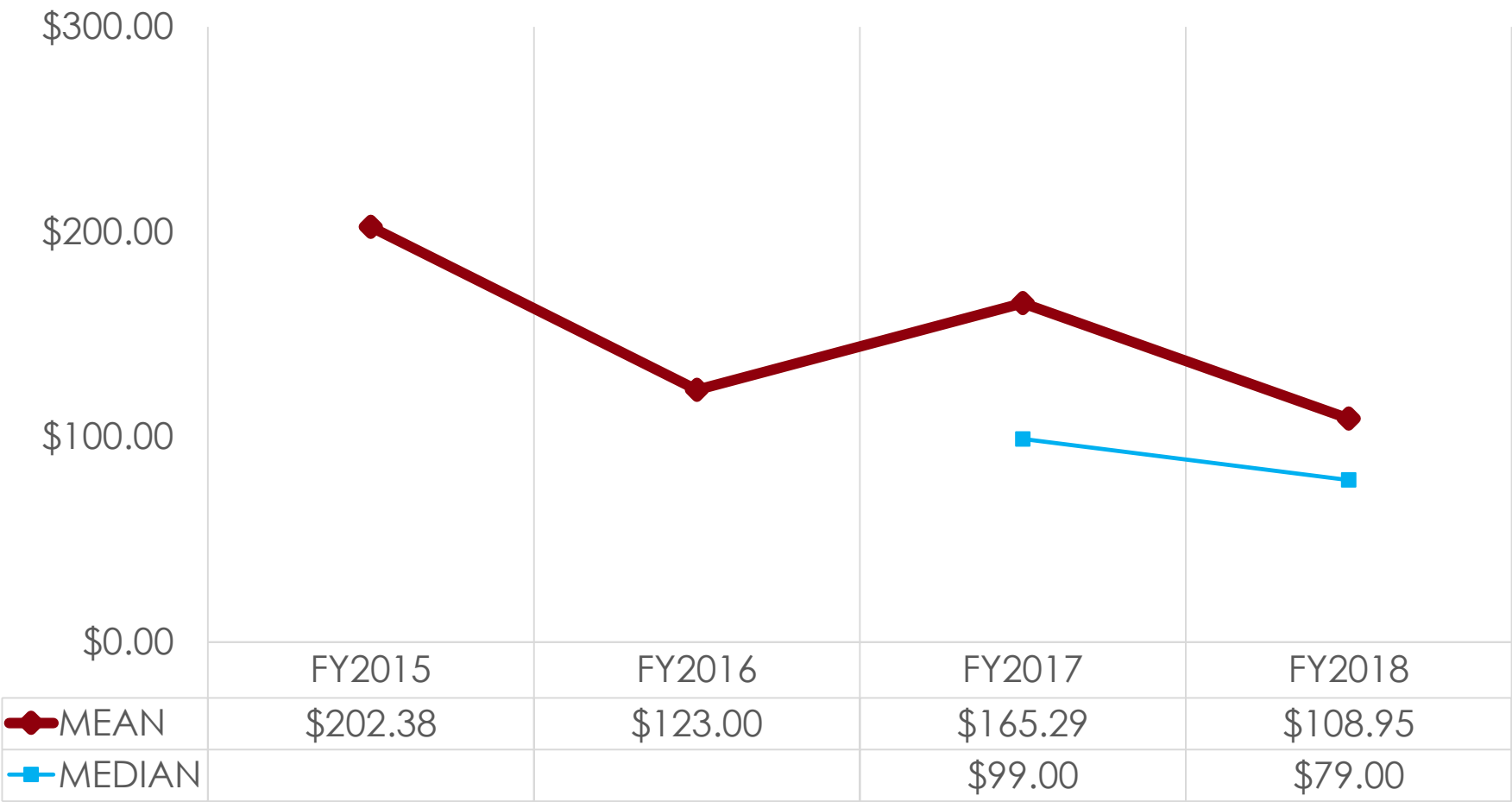
Prepaid – Tracking

Ground Transportation - Philippines



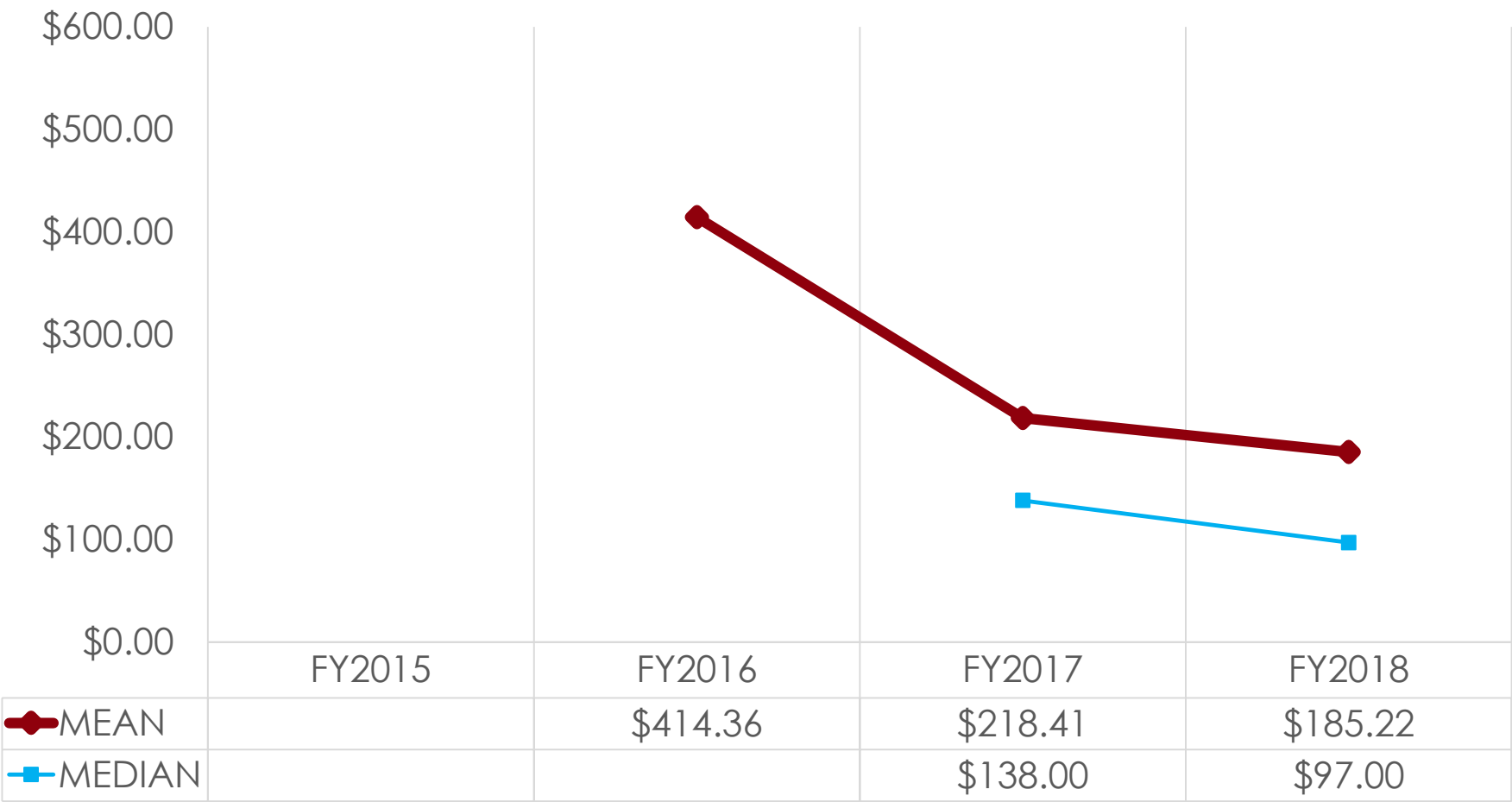
Prepaid – Tracking

Ground Transportation - Guam



Prepaid – Tracking

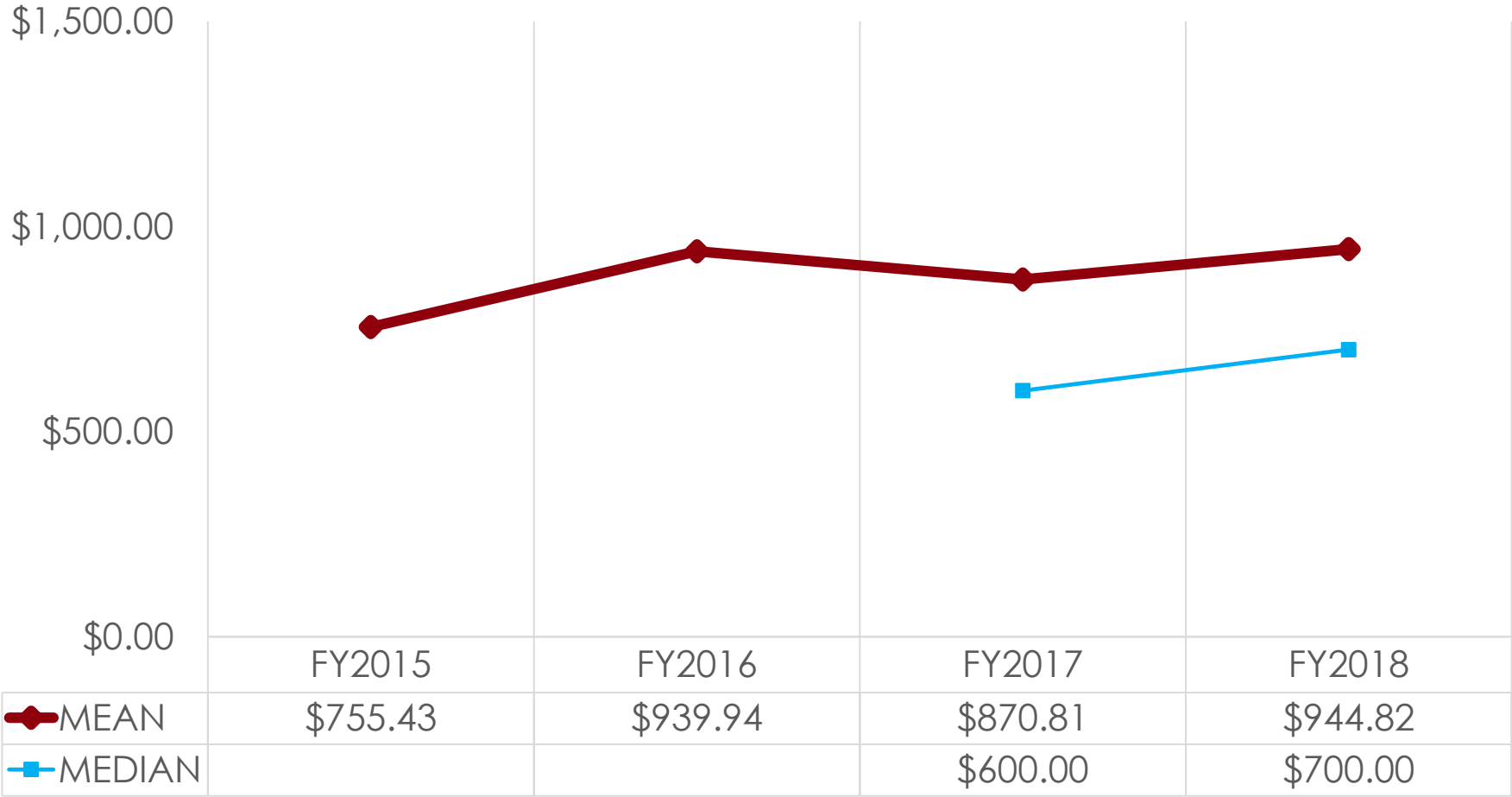
Optional tours/ Activities



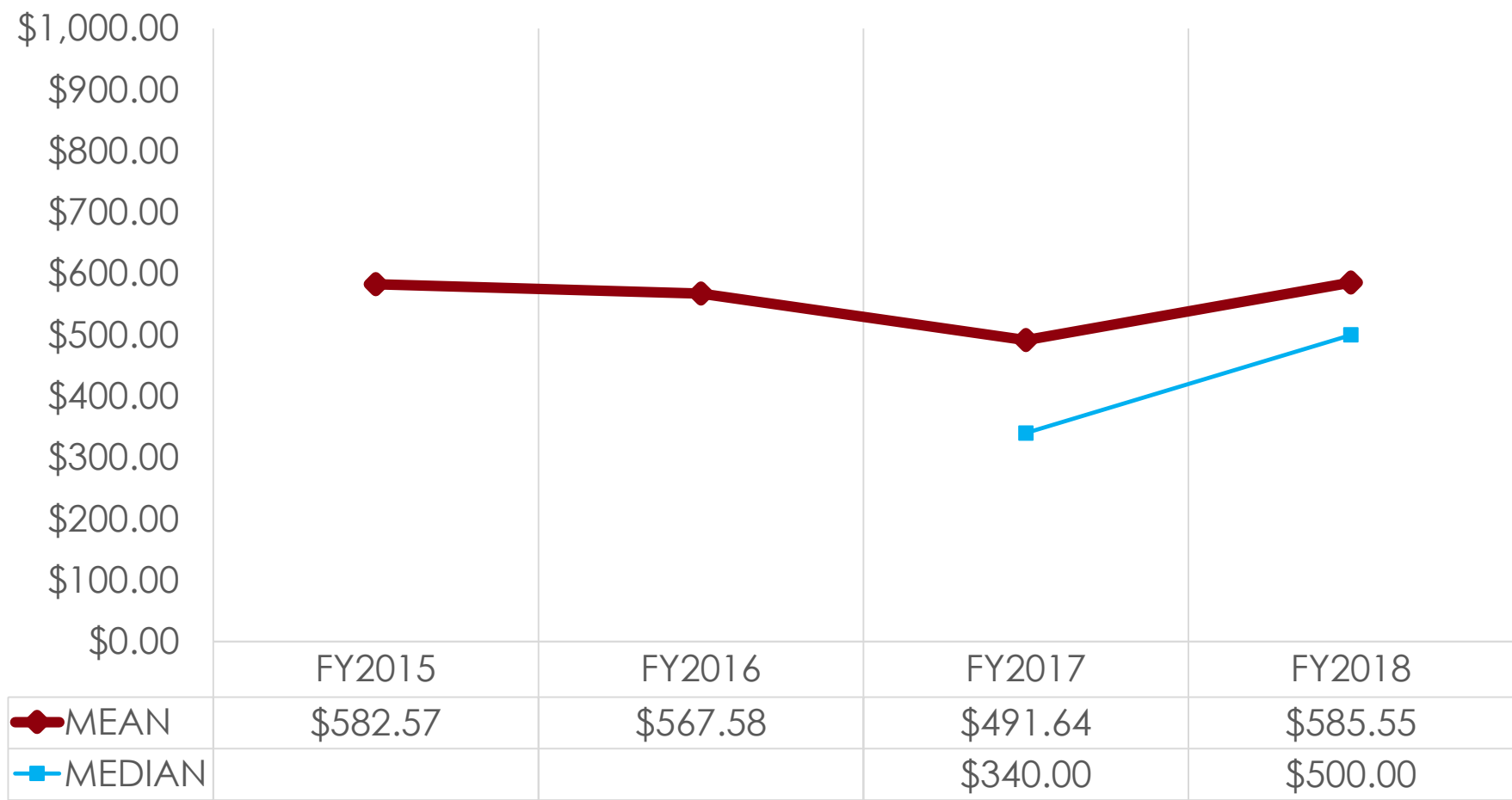
On-Island Expenditures

- \$944.82 = overall mean average on-island expense (for entire travel party size) by respondent
- \$585.55 = overall mean average per person prepaid expenditures

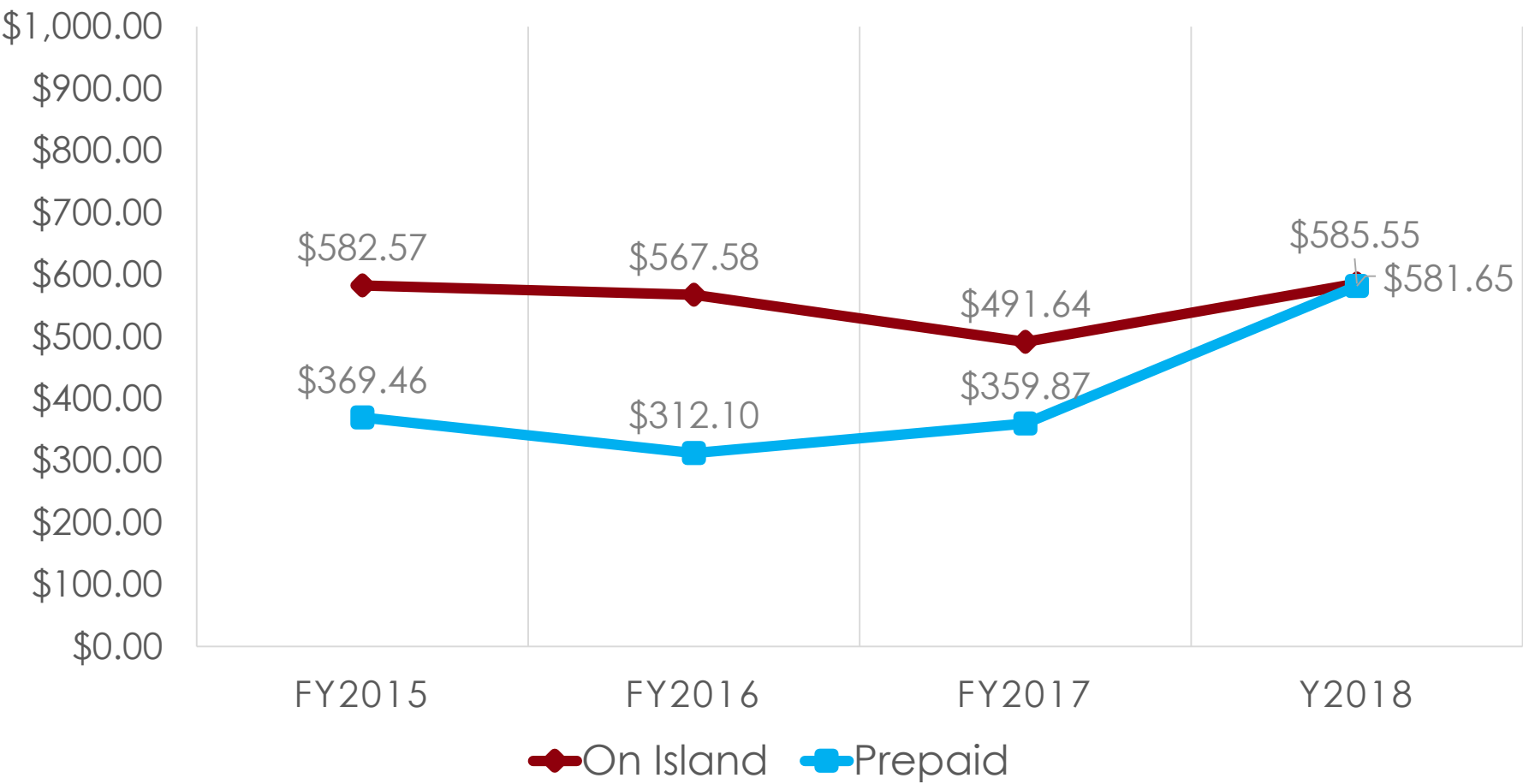
On-Island Entire Travel Party – Tracking



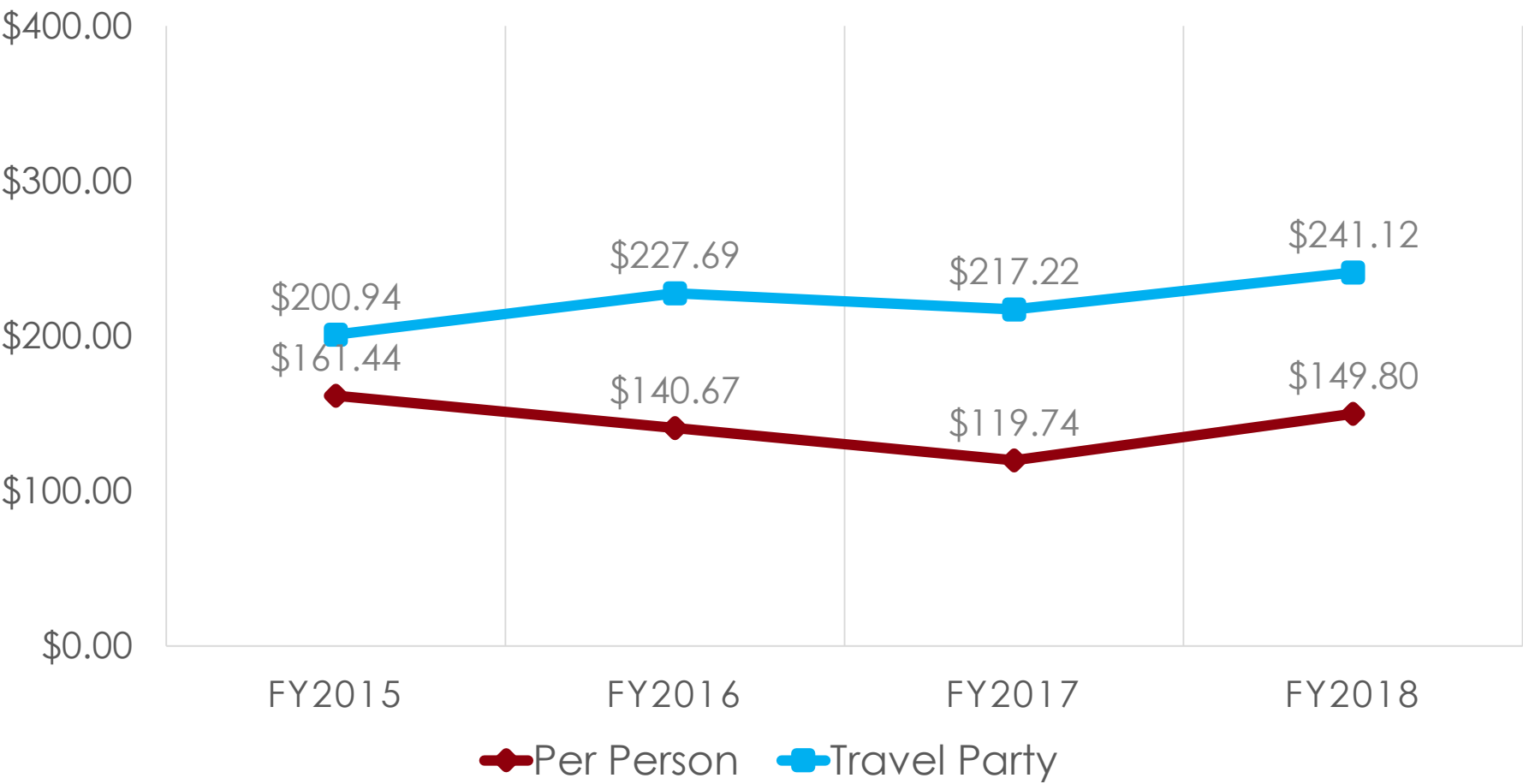
On-Island Per Person – Tracking



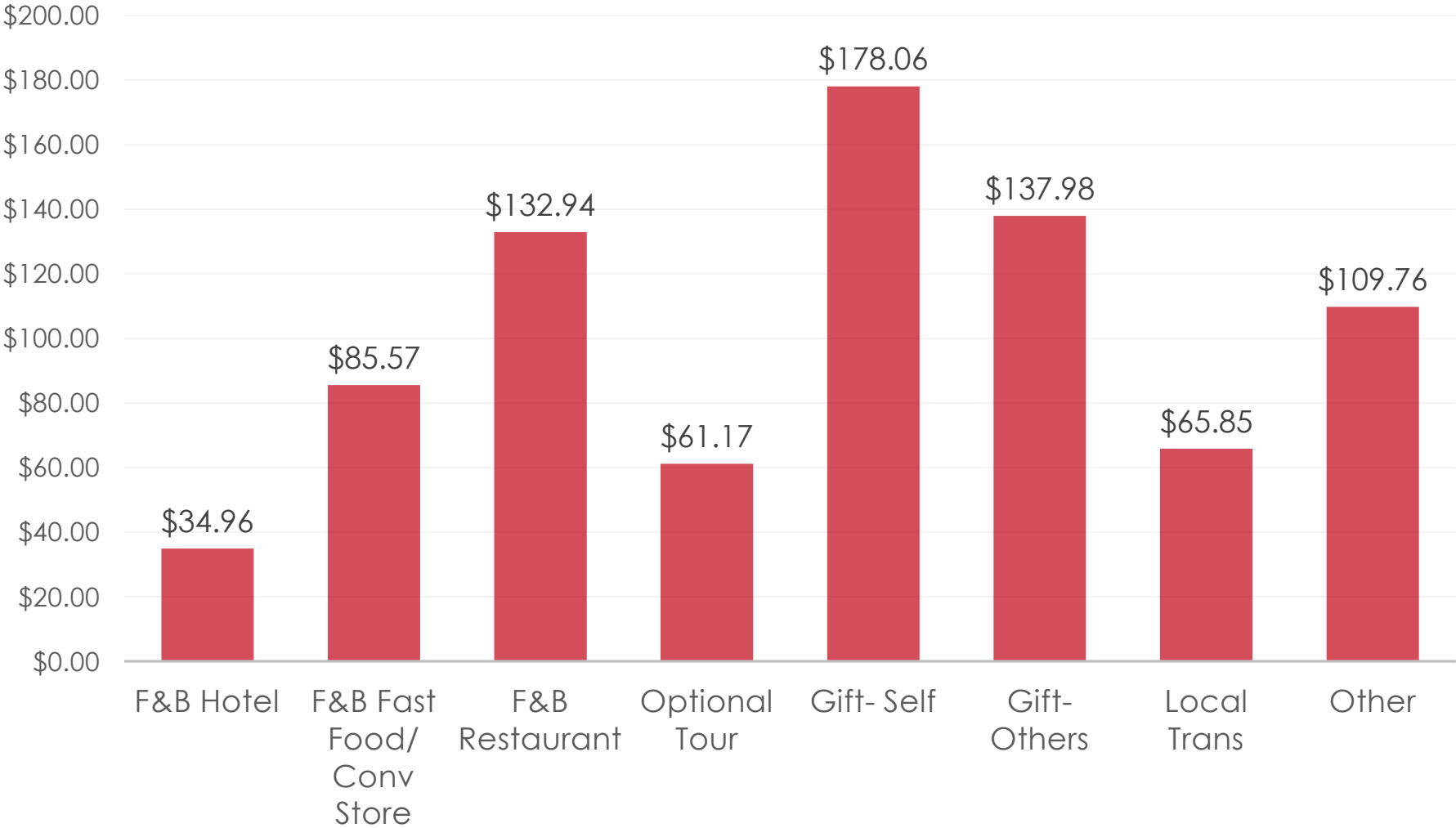
Per Person MEAN expenditures – Tracking On-Island/ Prepaid



On-Island Per Day Spending – Tracking Mean



On-Island Expenses by Category – Mean Entire Travel Party



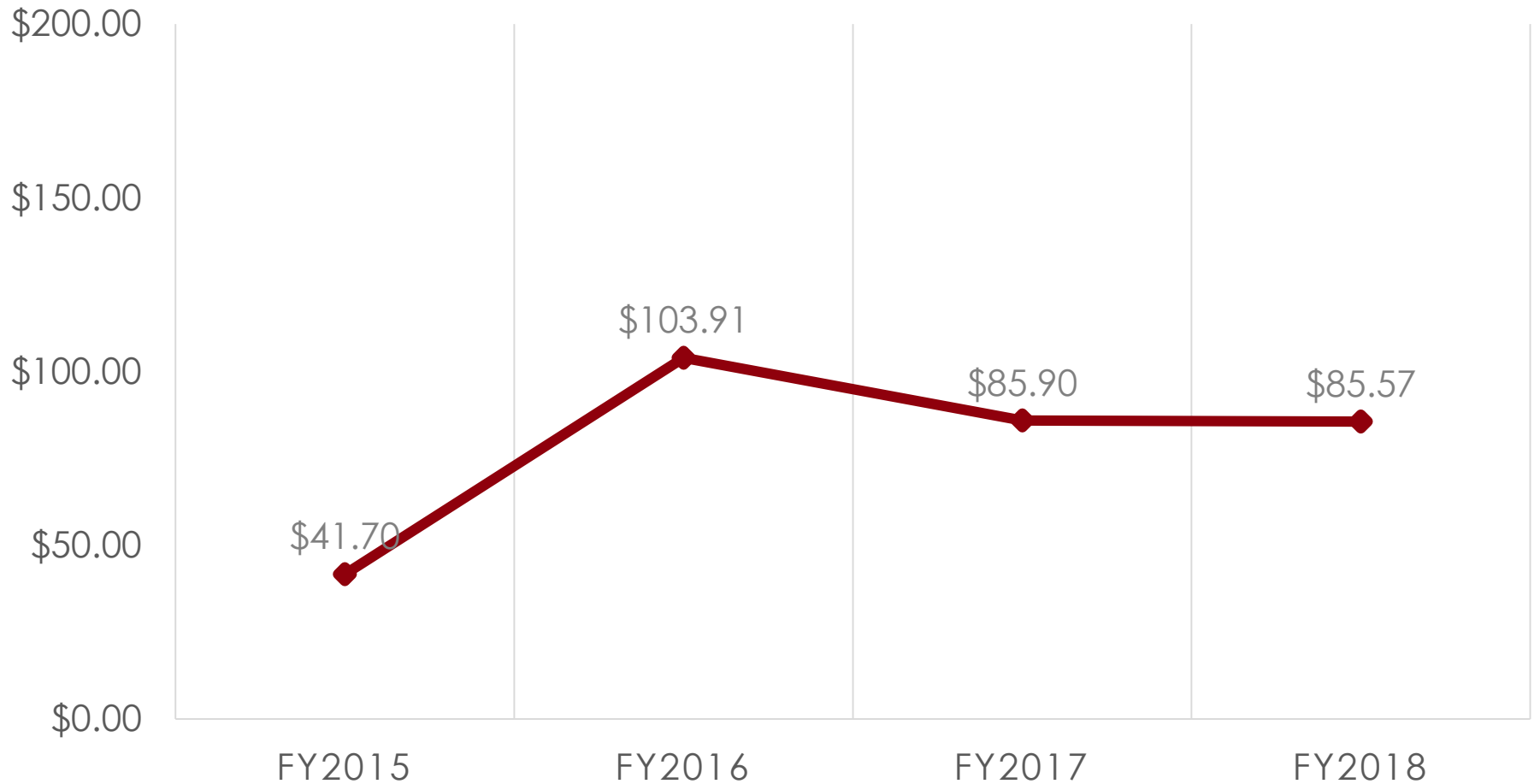
On-Island – Tracking

Food & Beverage - Hotel



On-Island – Tracking

Food & Beverage – Fast Food/ Convenience Store



On-Island – Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



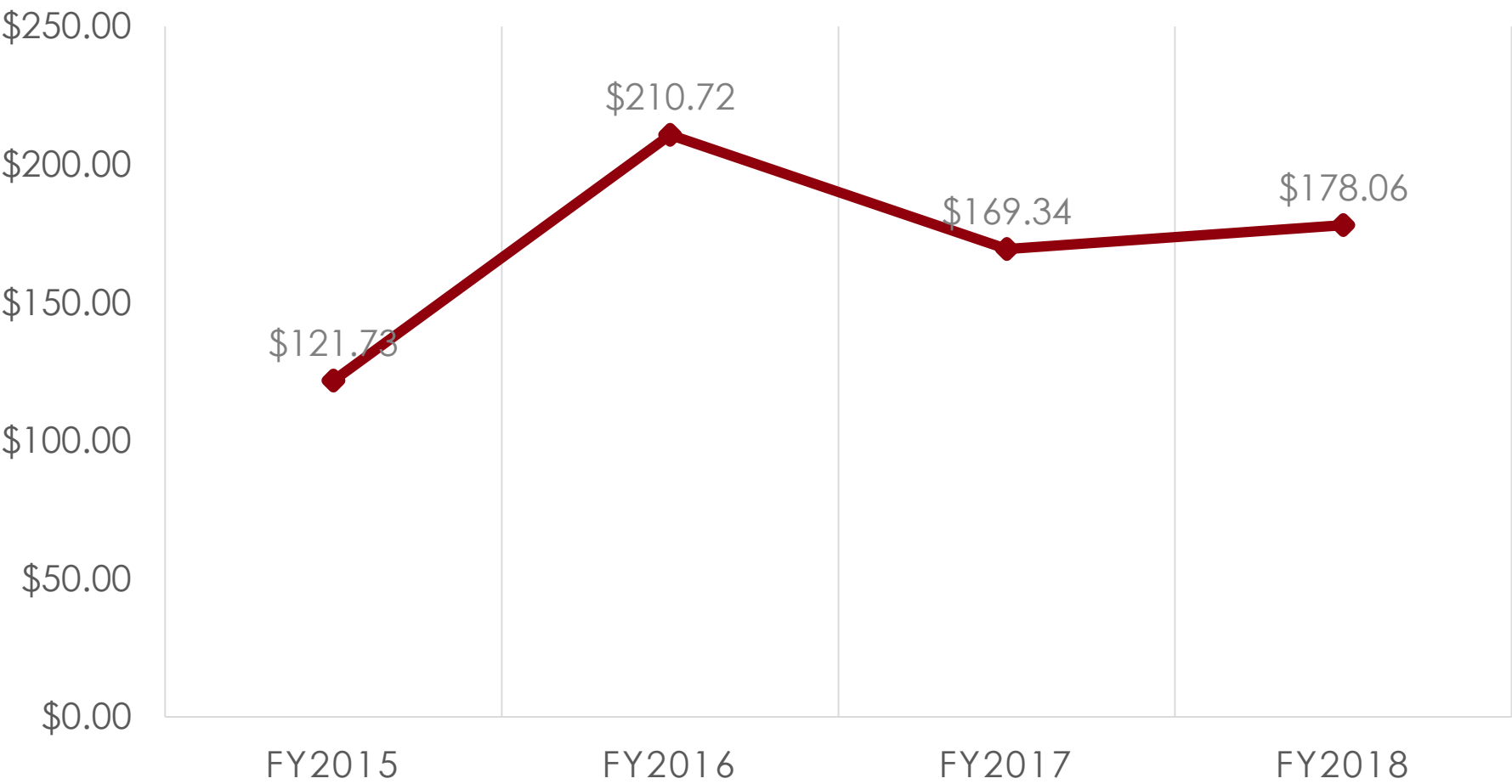
On-Island – Tracking

Optional tour/ Activities



On-Island – Tracking

Gift/ Souvenir – Self/ Companion



On-Island – Tracking

Gift/ Souvenir – Friends/ Family



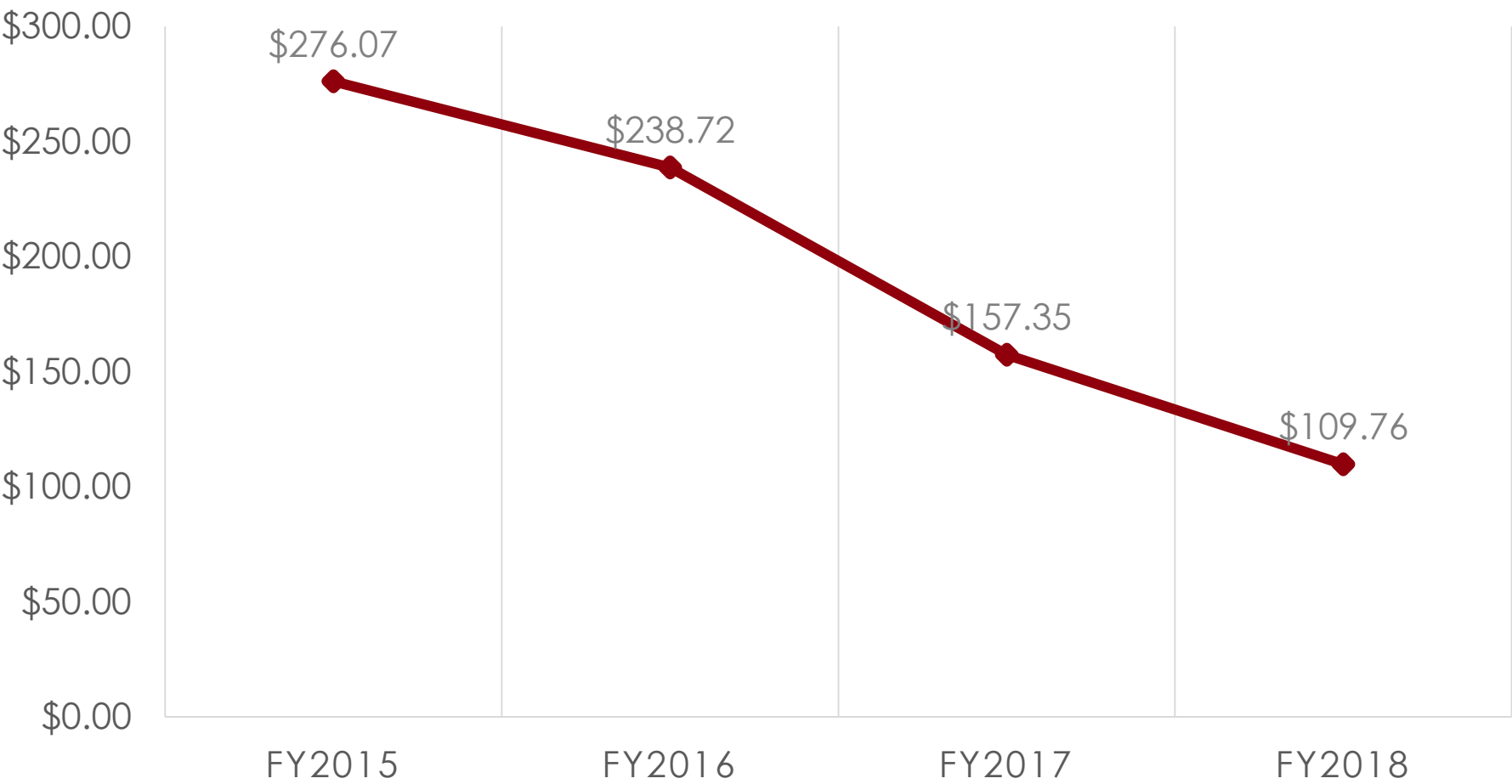
On-Island – Tracking

Local Transportation



On-Island – Tracking

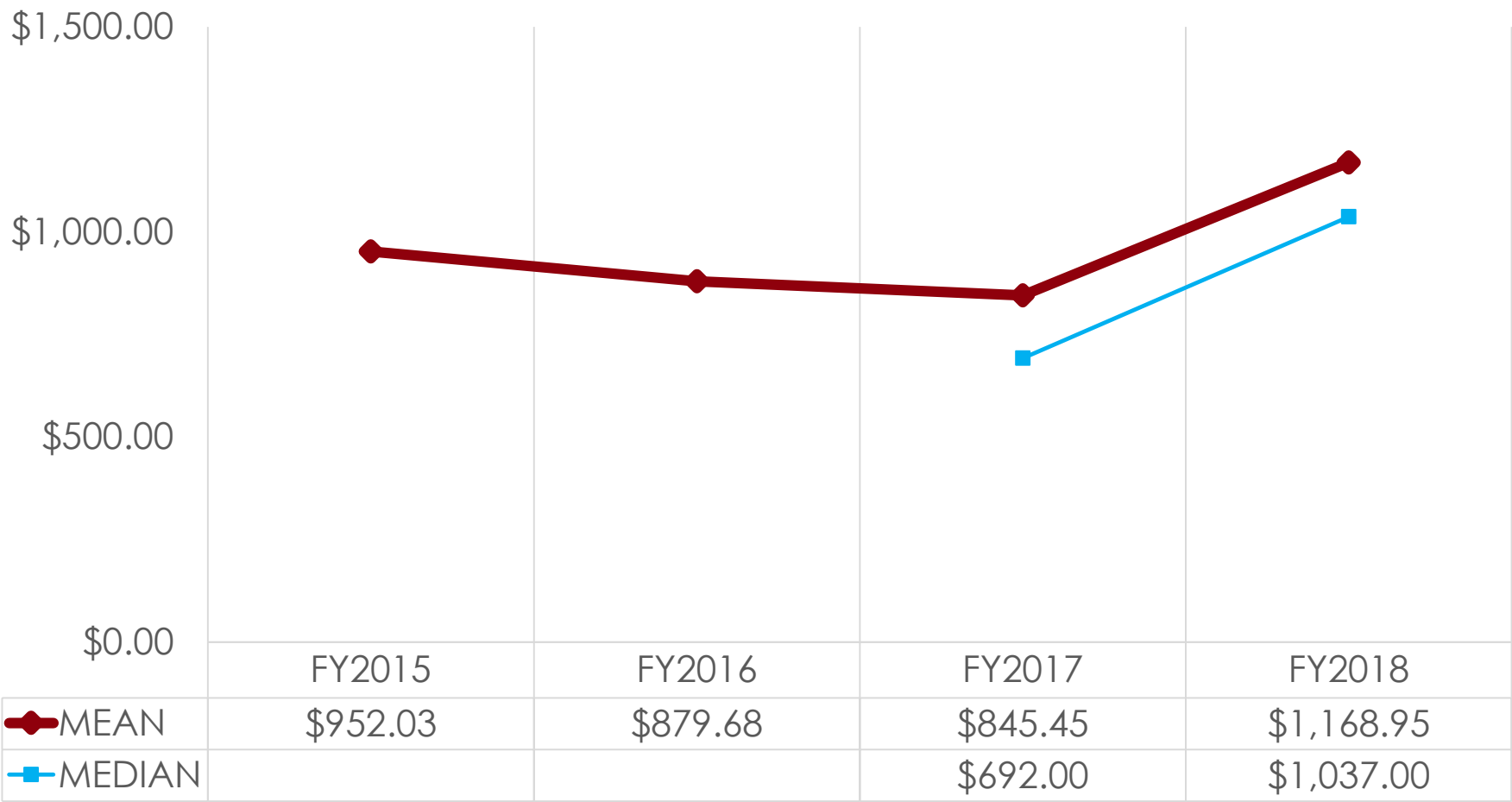
Other Not Included



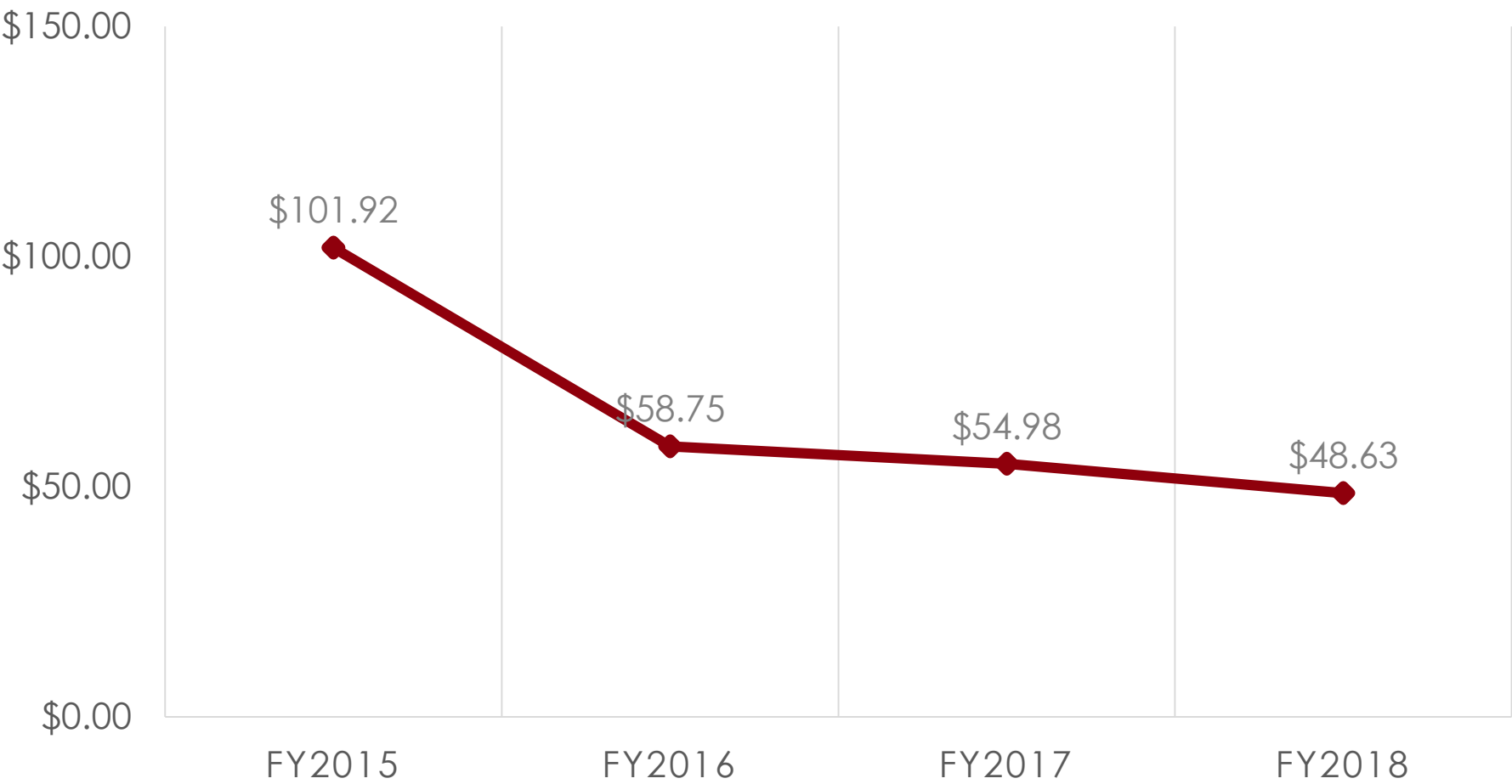
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,168.95 = TOTAL Per Person Expenditure

TOTAL Per Person Expenditures – Tracking



GUAM AIRPORT EXPENDITURE – Tracking

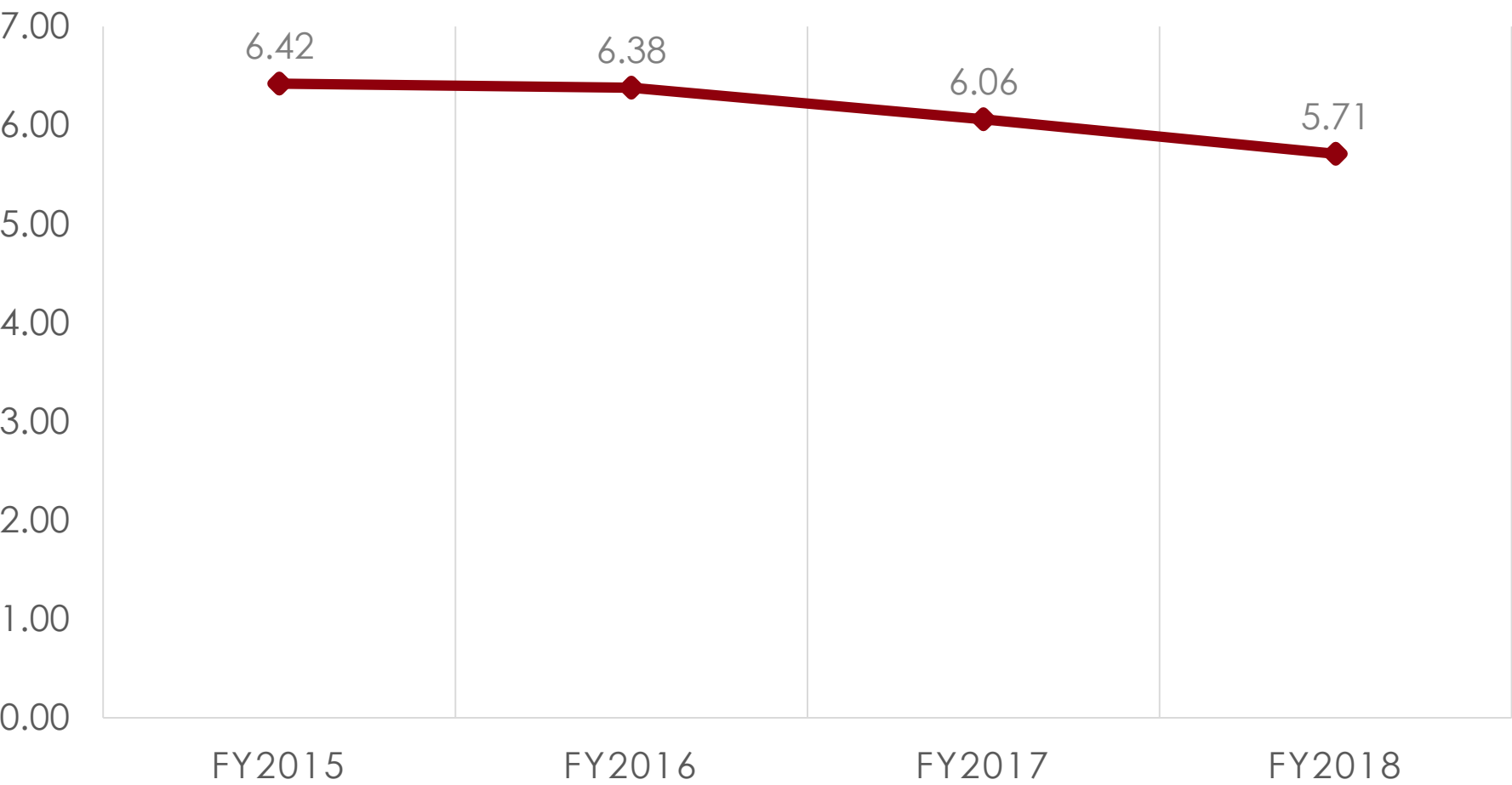


SECTION 4

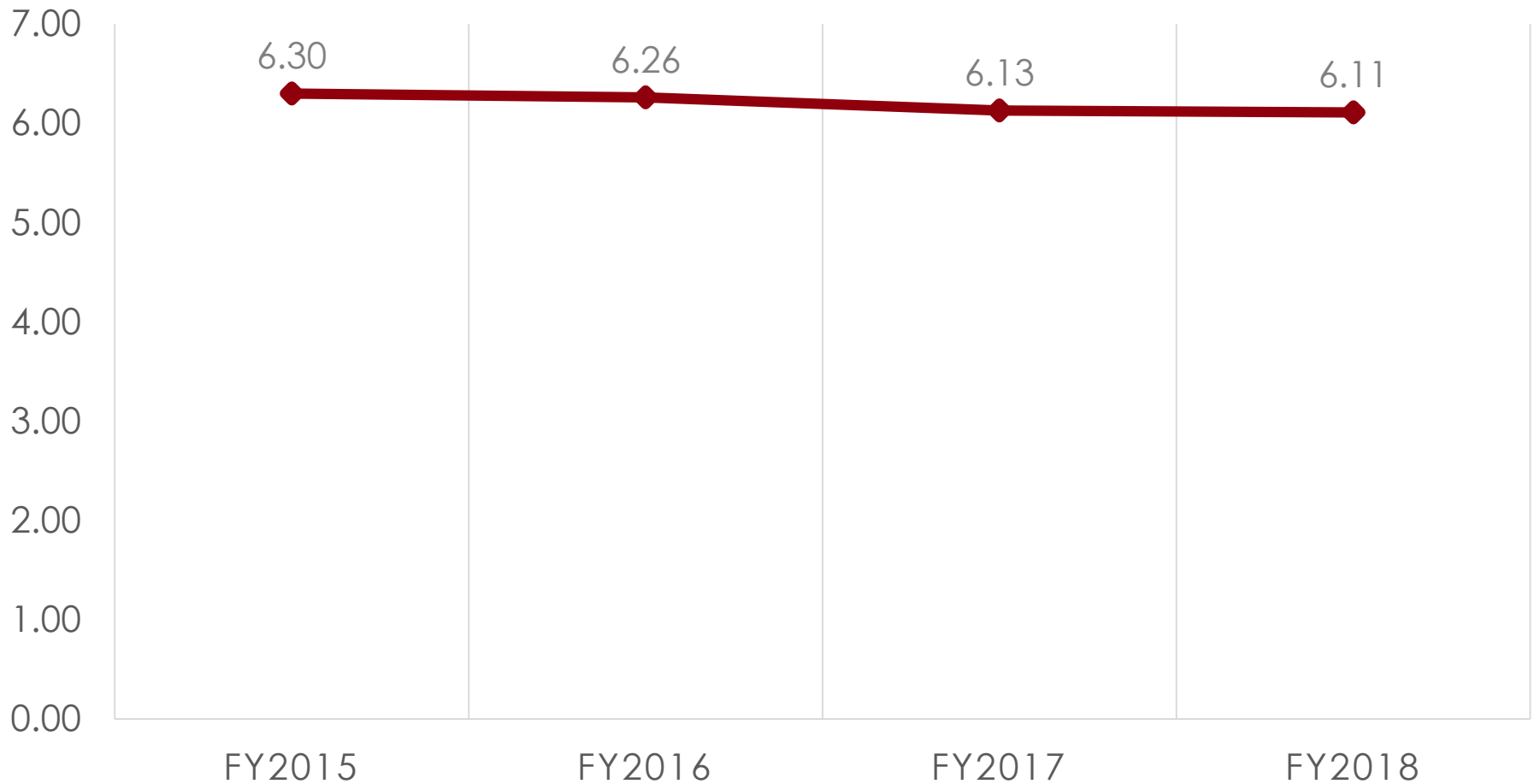
VISITOR SATISFACTION

BEHAVIOR

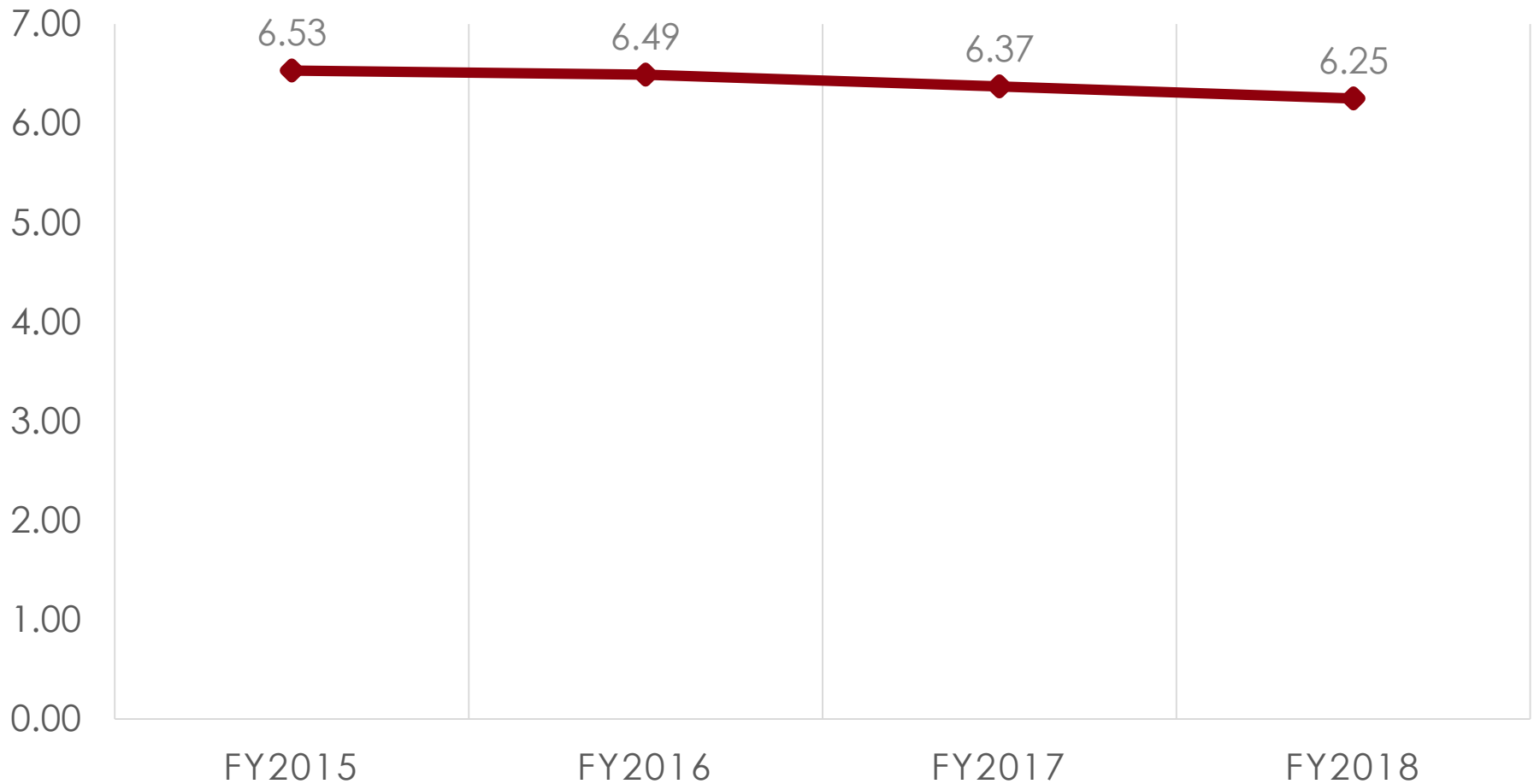
OVERALL SATISFACTION



Guam was better than expected



I had no communication problems

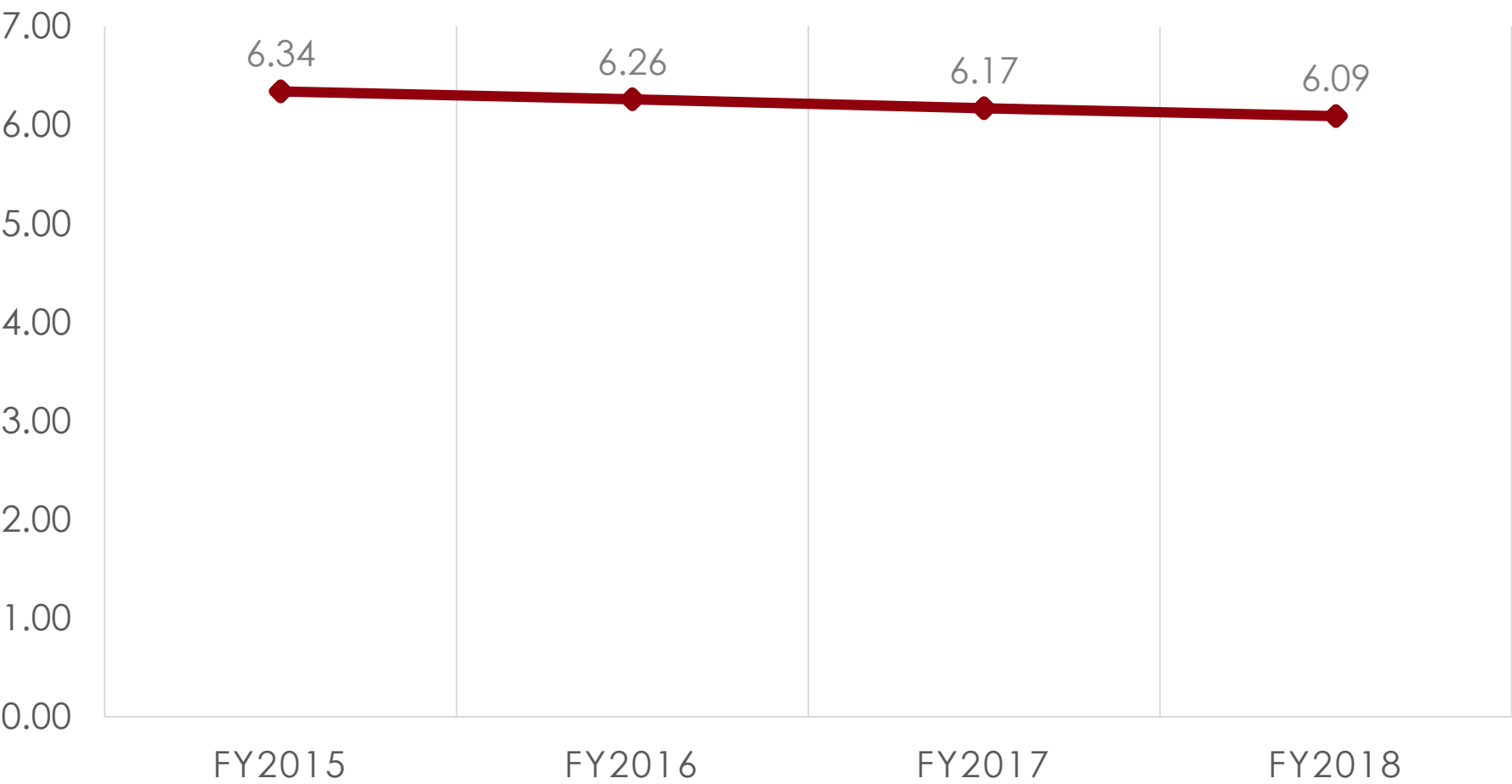


Recommend Guam - family & friends

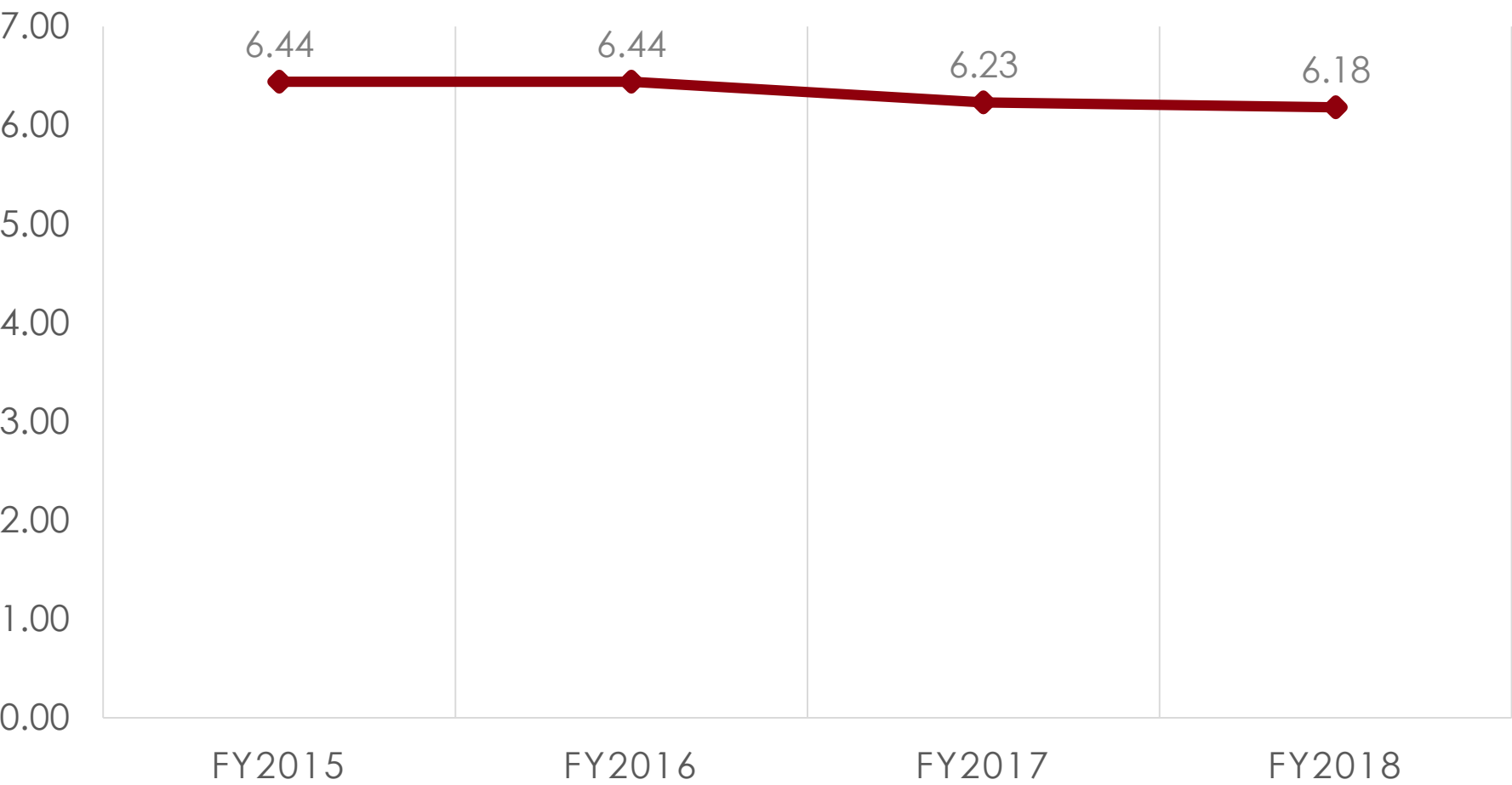
(10PT SCALE)



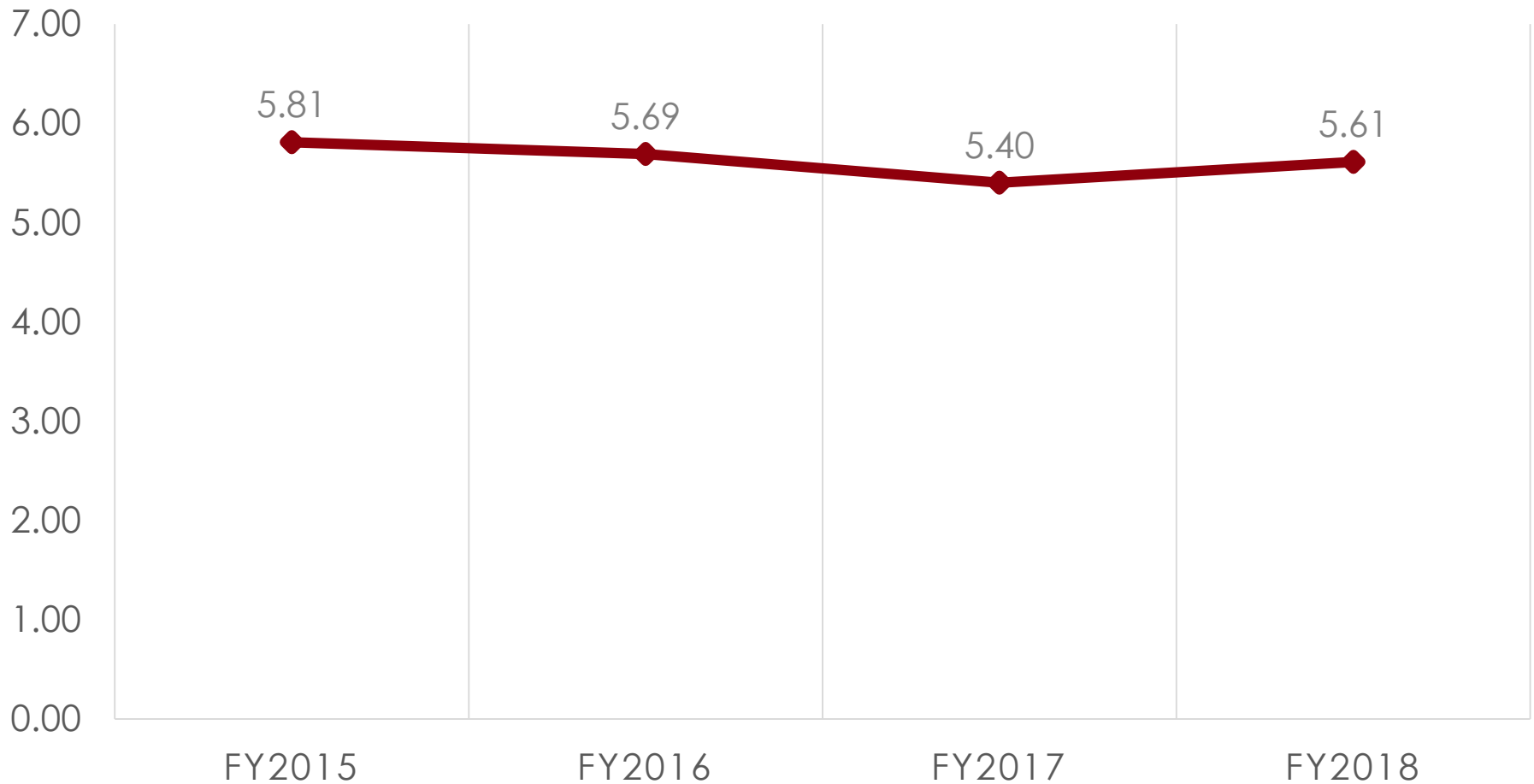
Sites on Guam were attractive



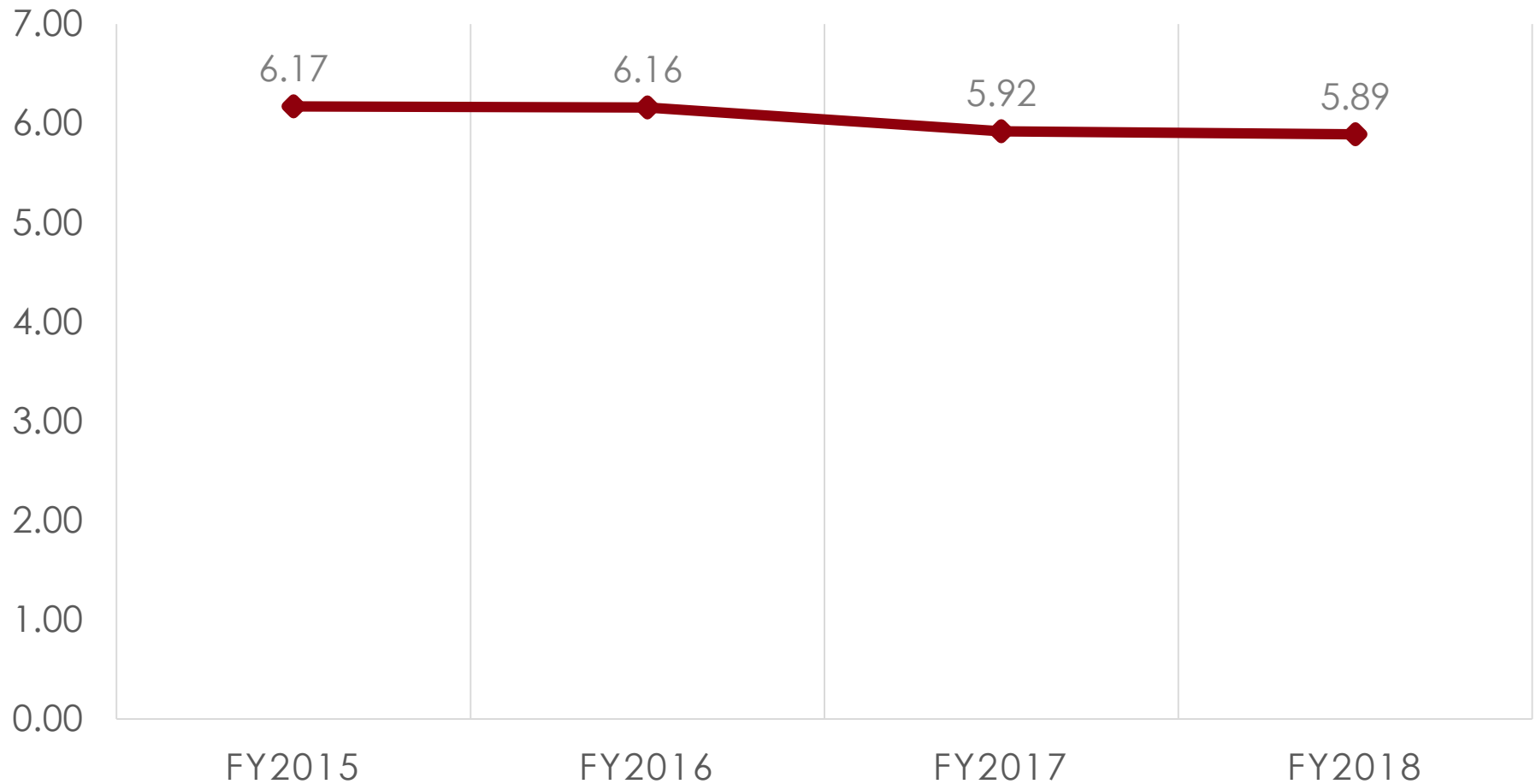
I plan to visit Guam again



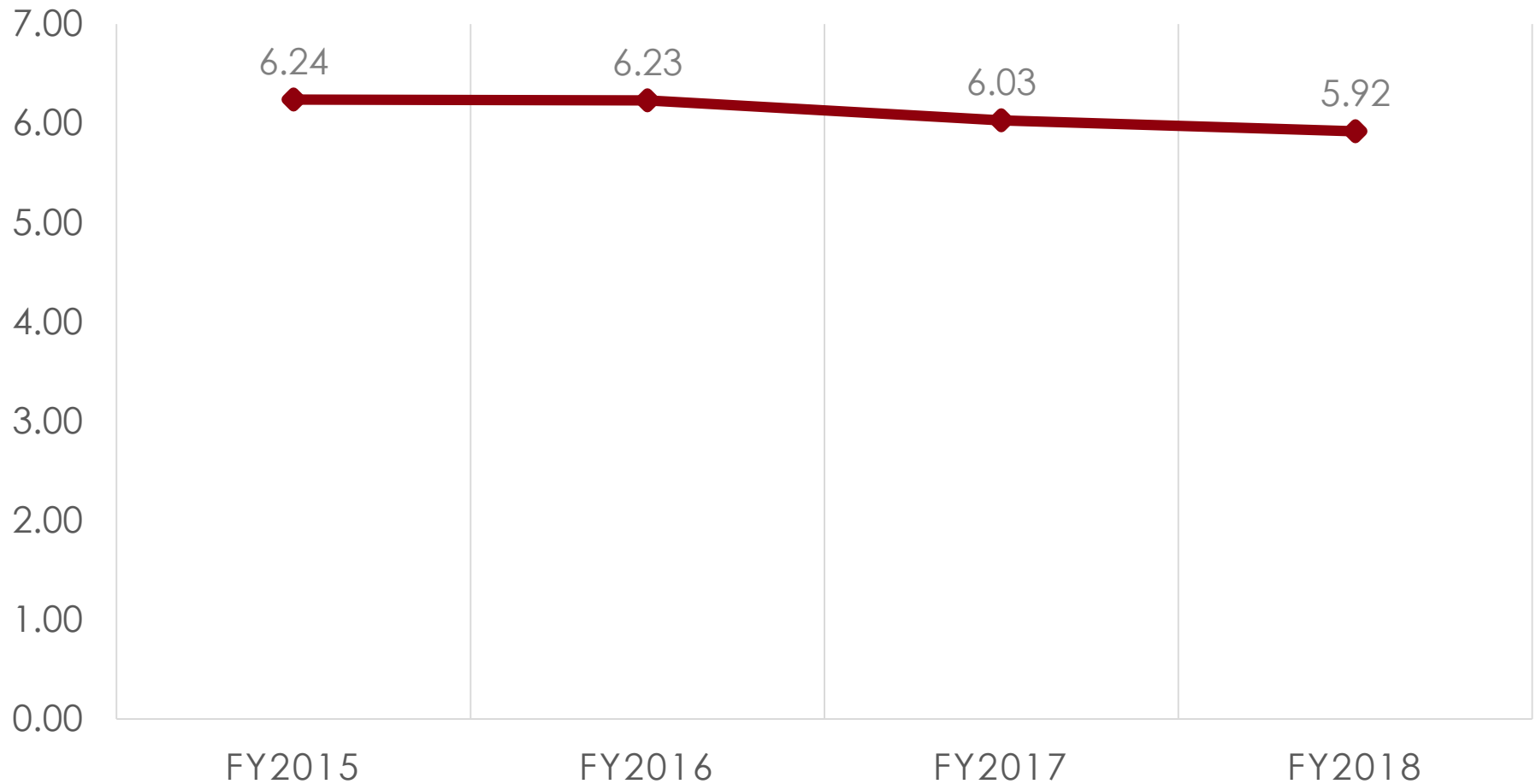
Not enough night time activities



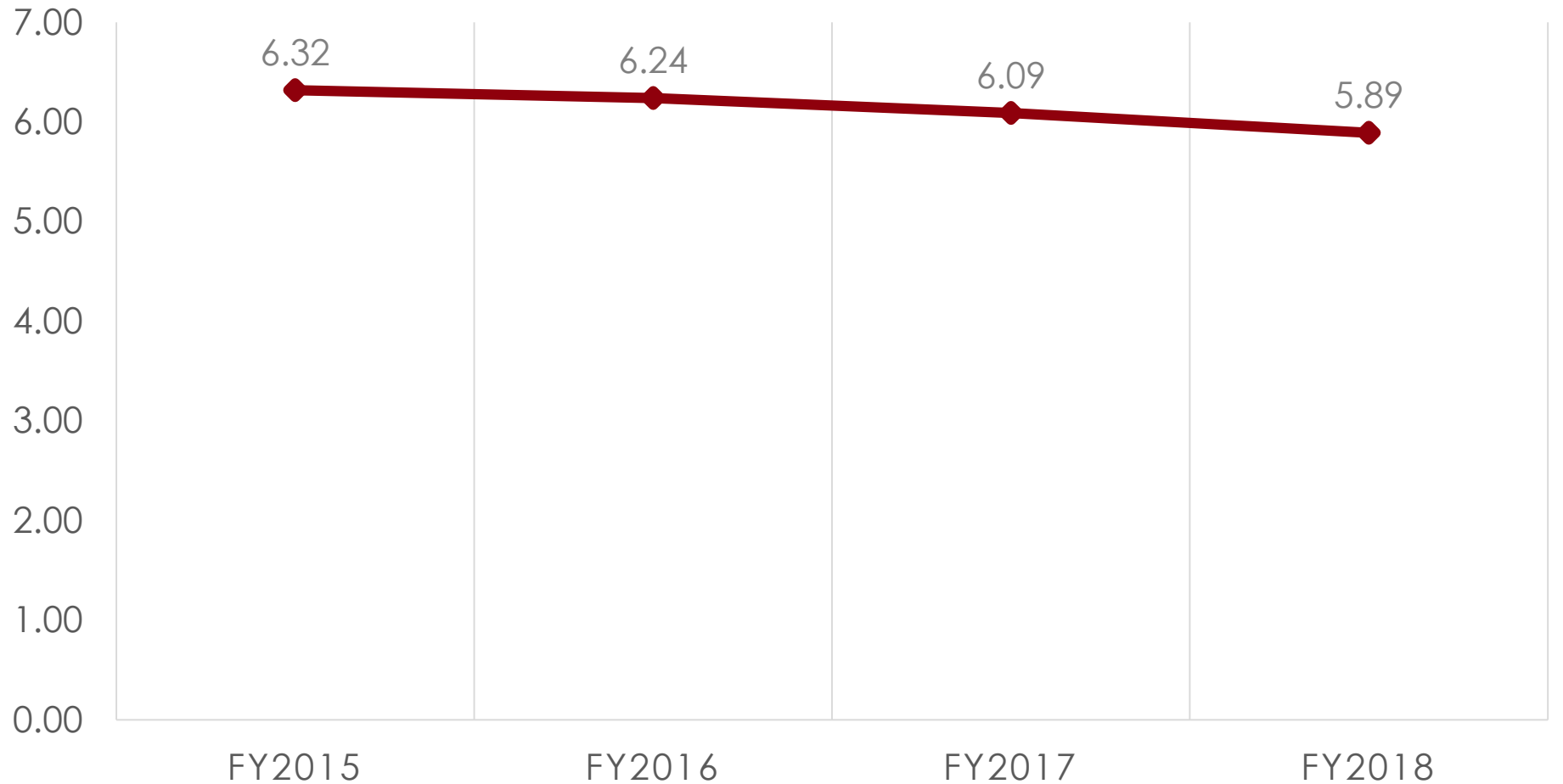
Tour guides were professional



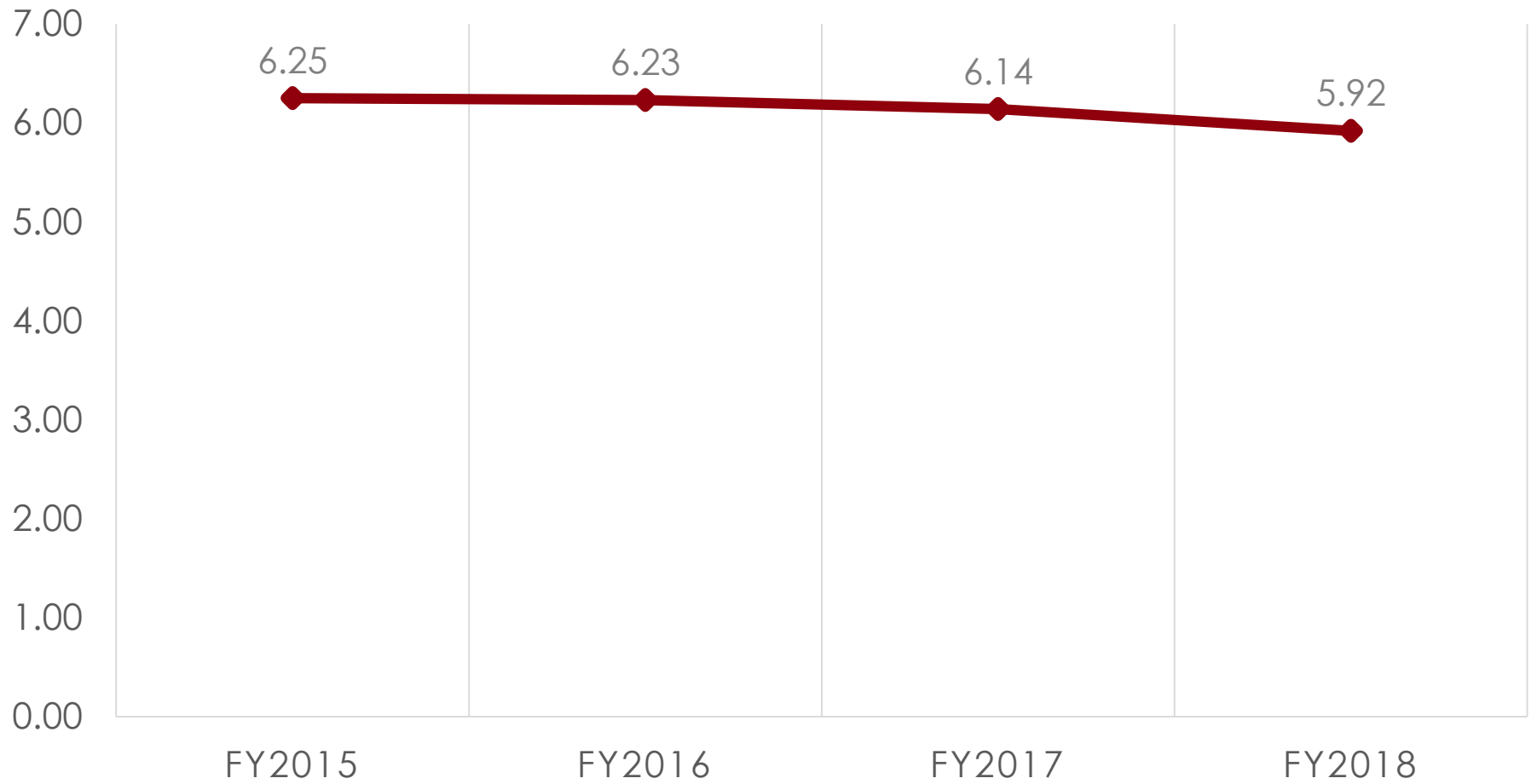
Tour drivers were professional



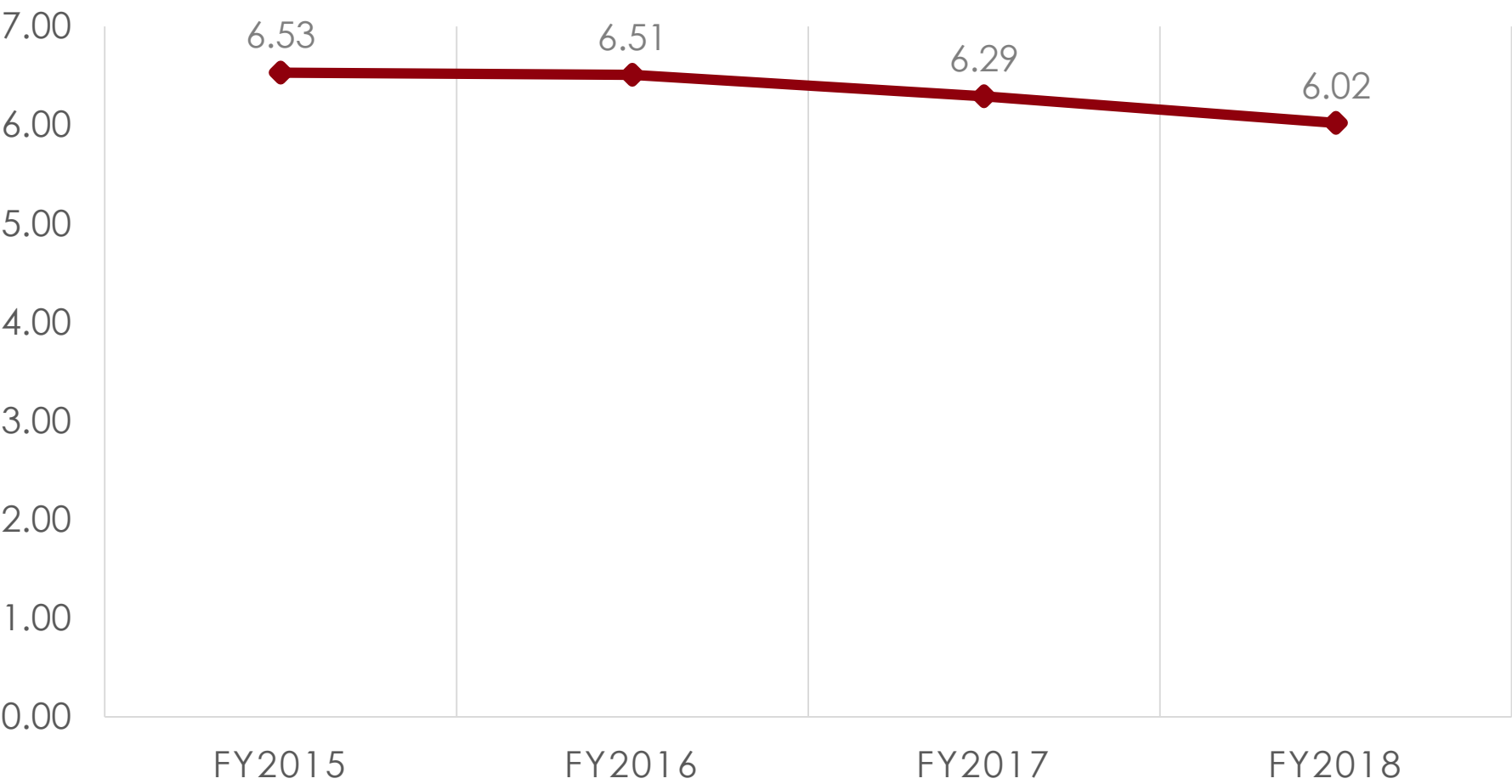
Taxi drivers were professional



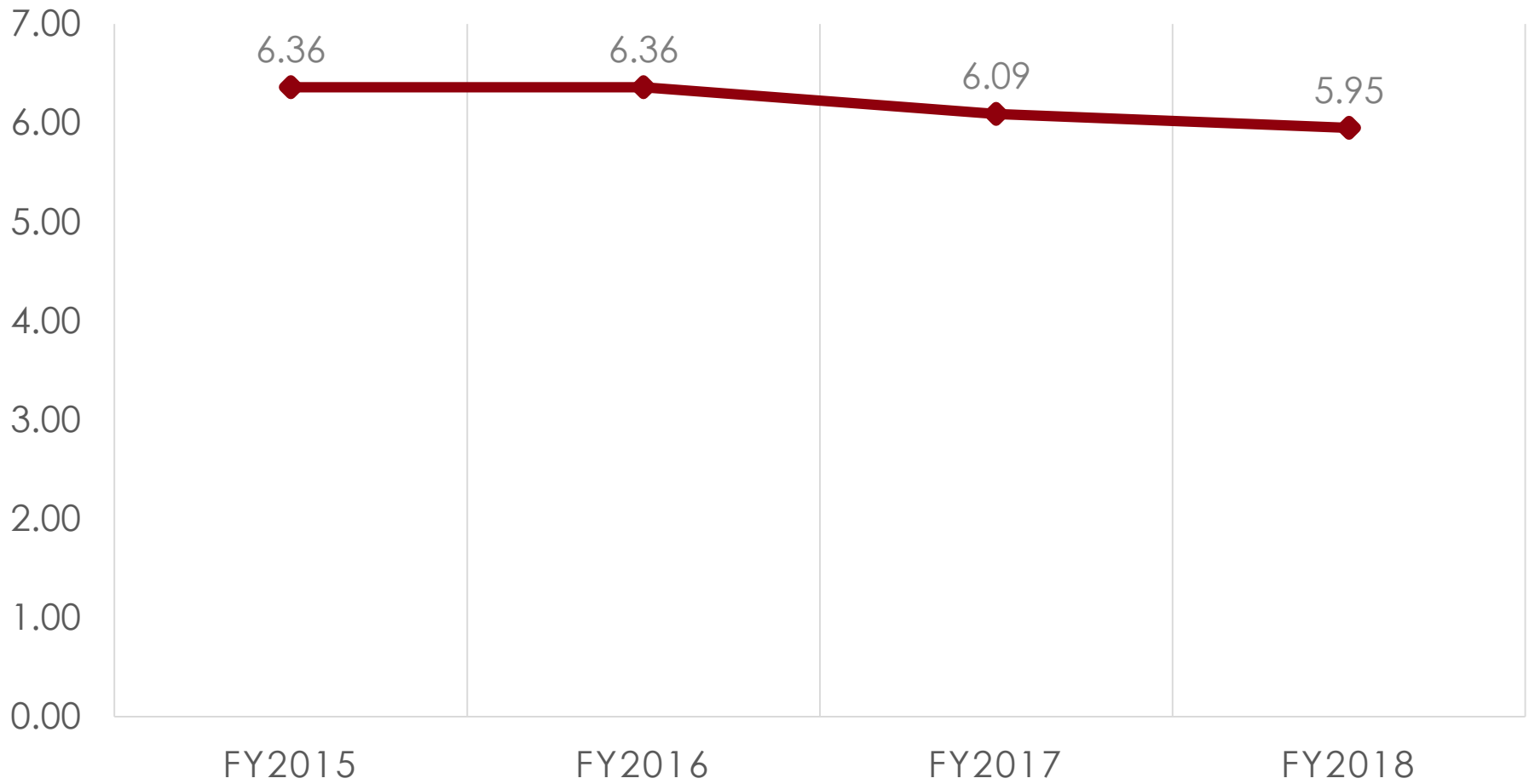
Taxis were clean



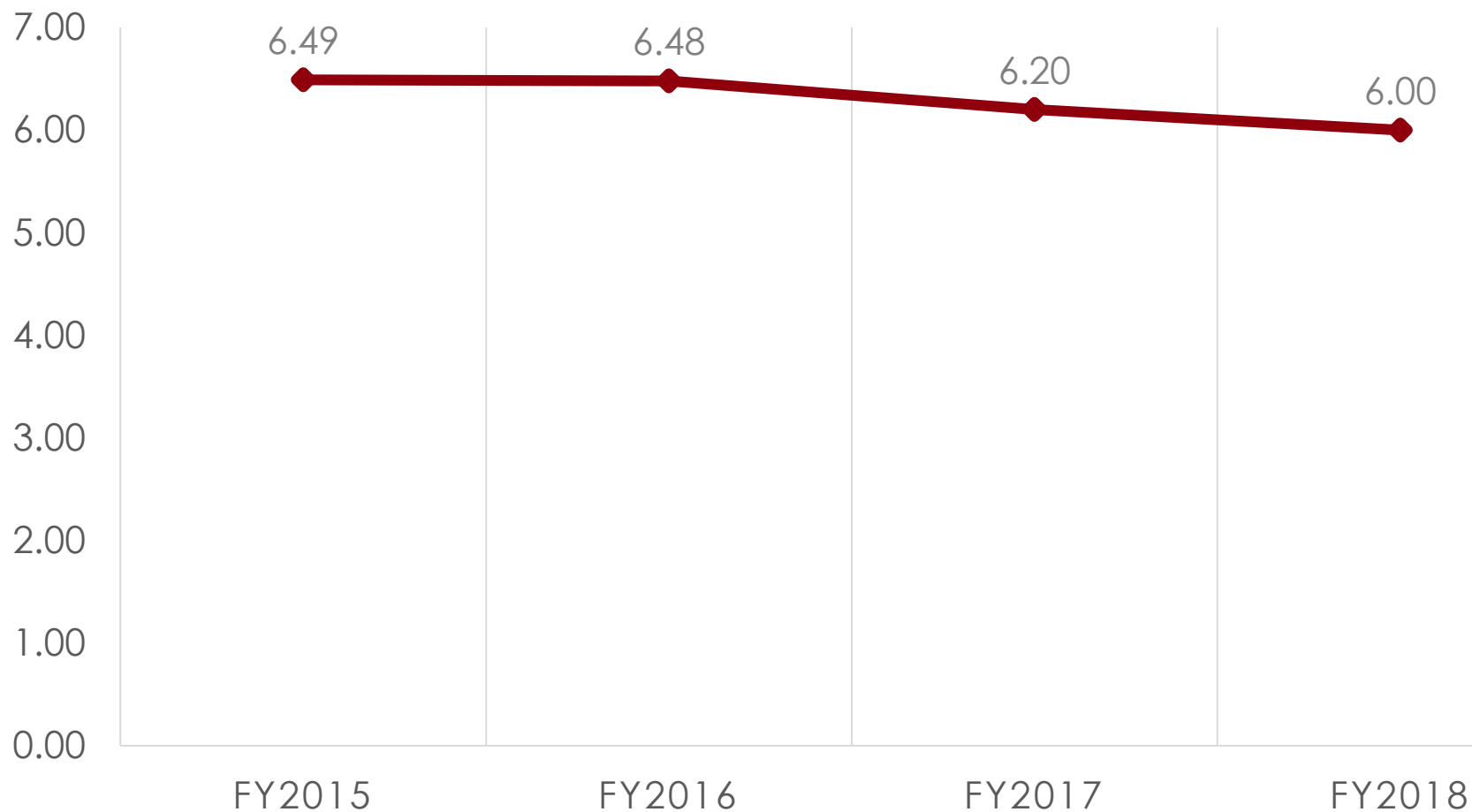
Guam airport was clean



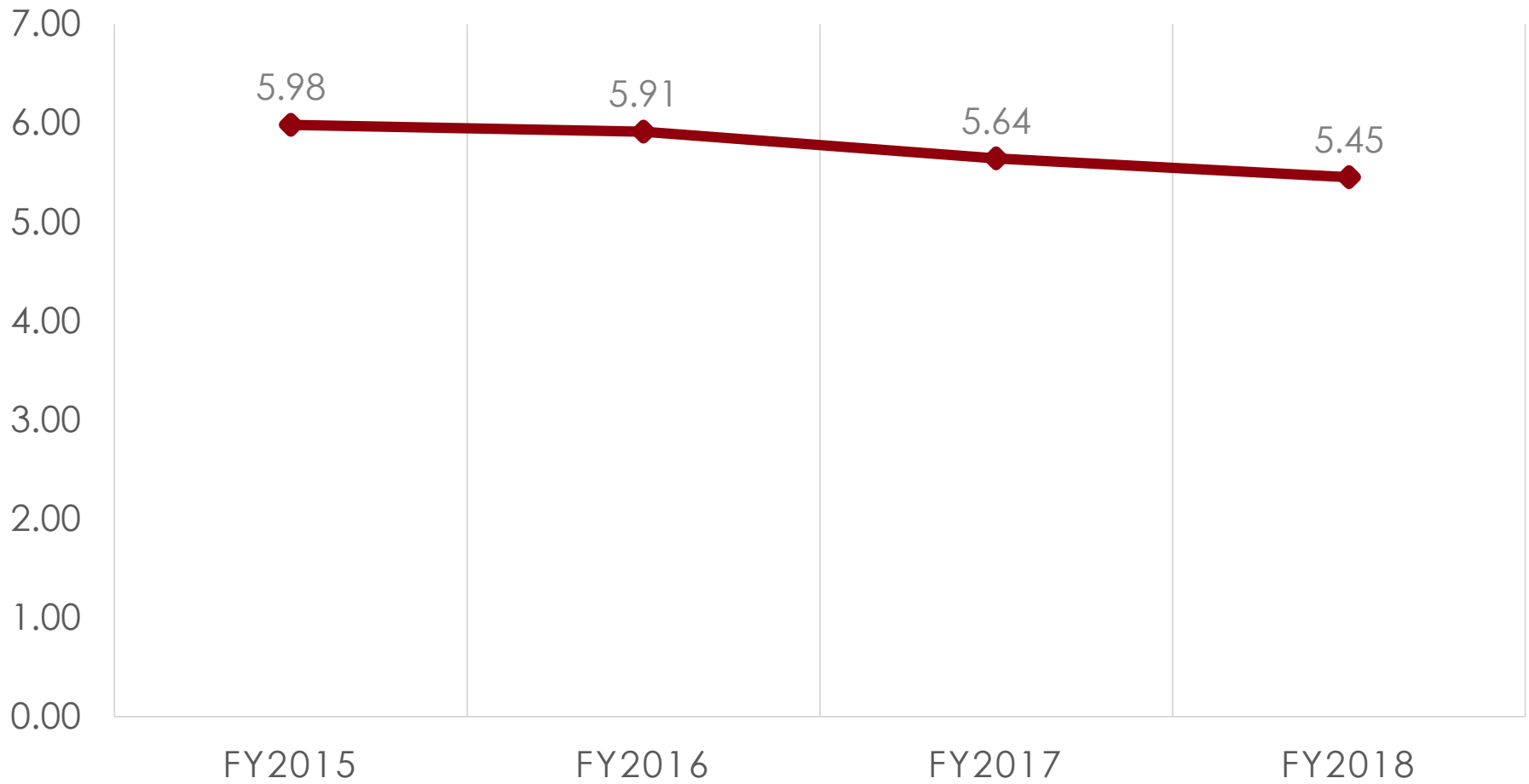
Ease of getting around



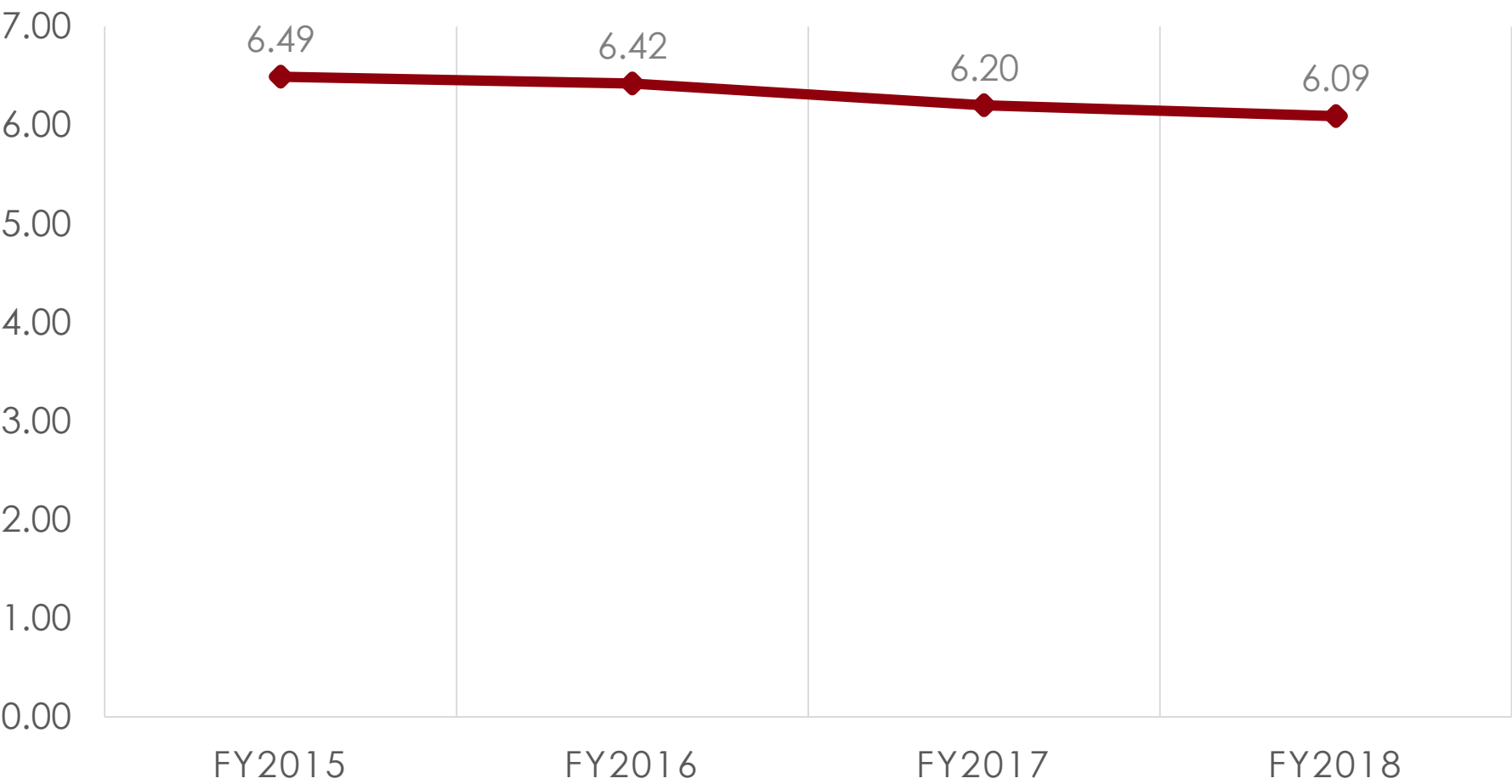
Safety walking around at night



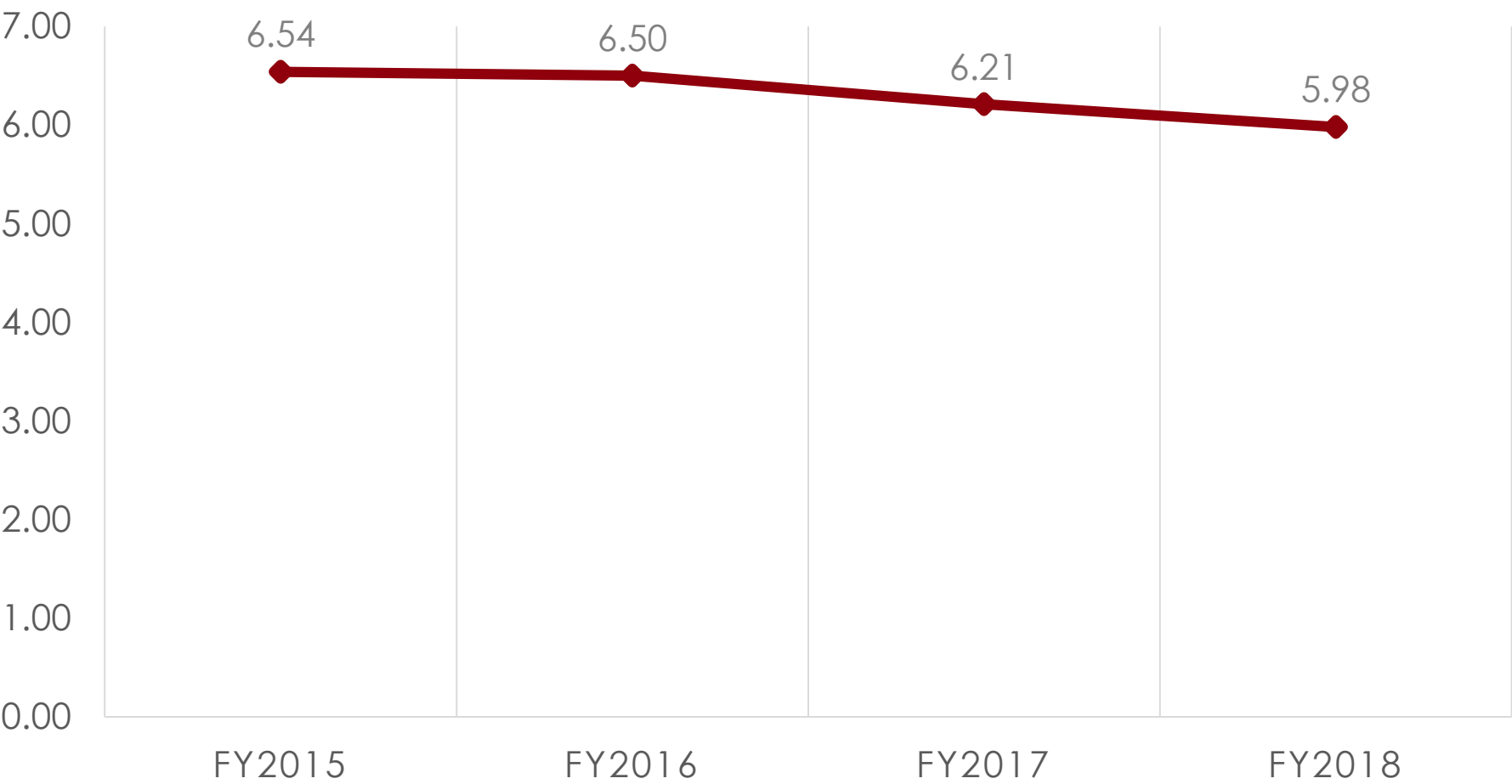
Price of things on Guam



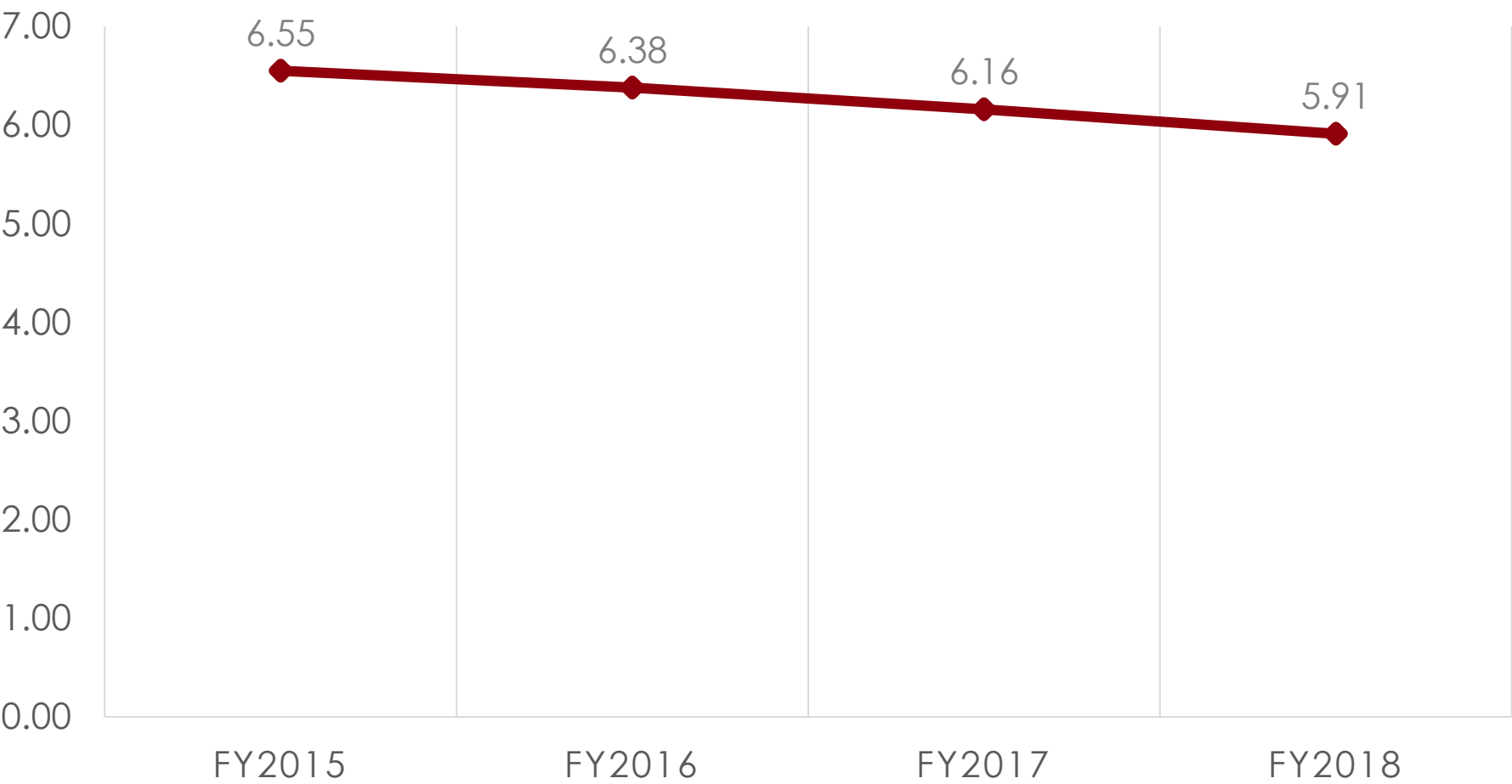
Quality/ Cleanliness - beach, ocean



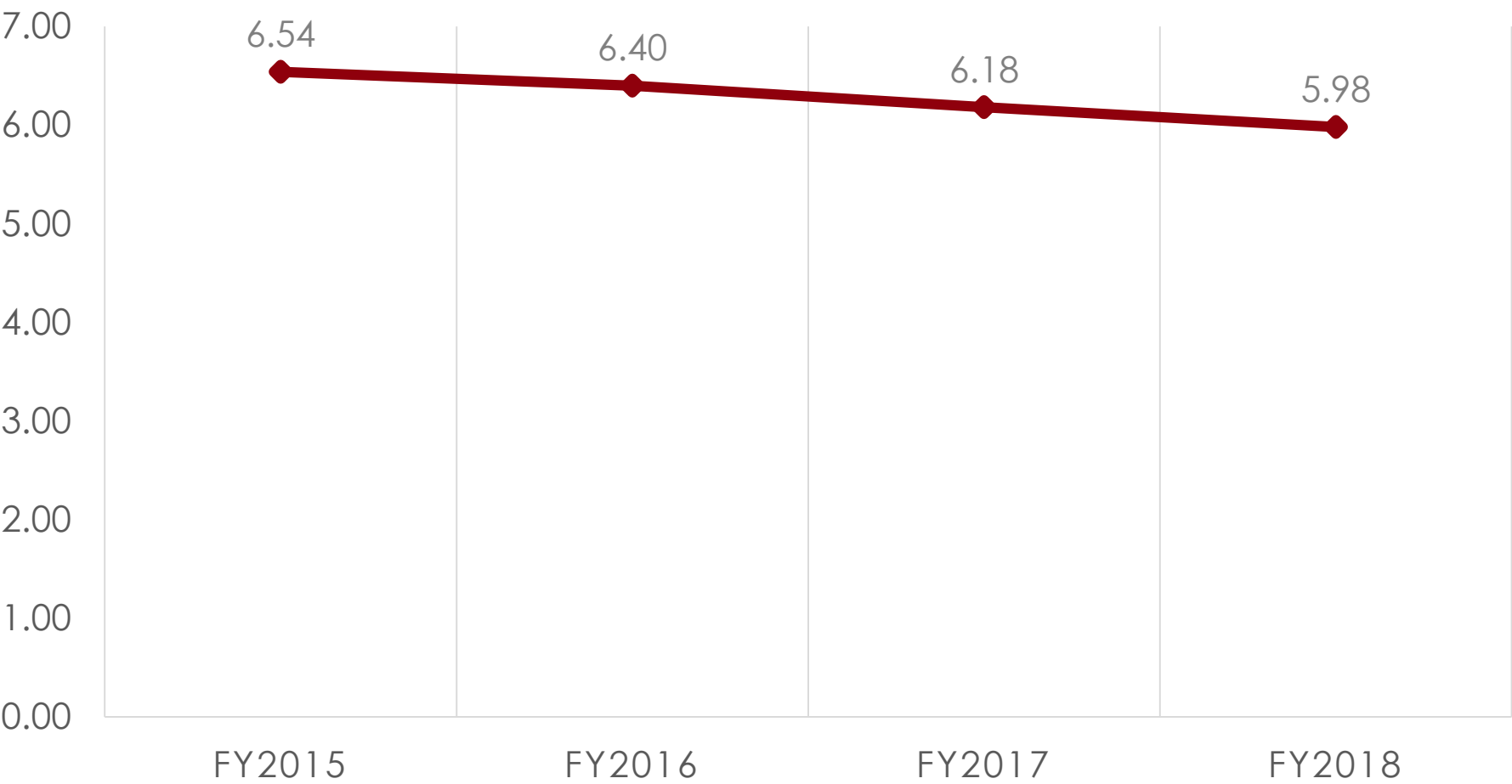
Quality/ Cleanliness - air, sky



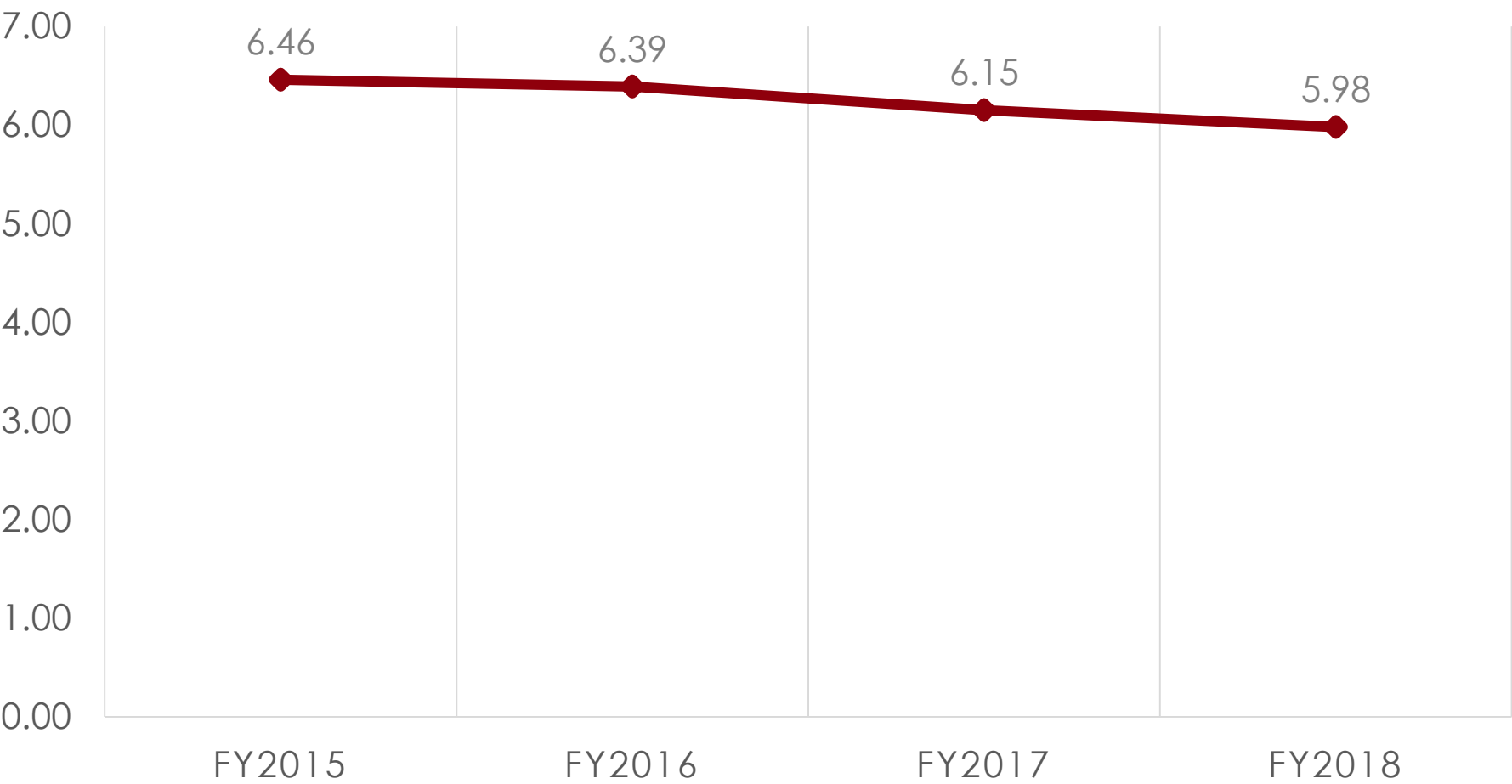
Quality/ Cleanliness - parks



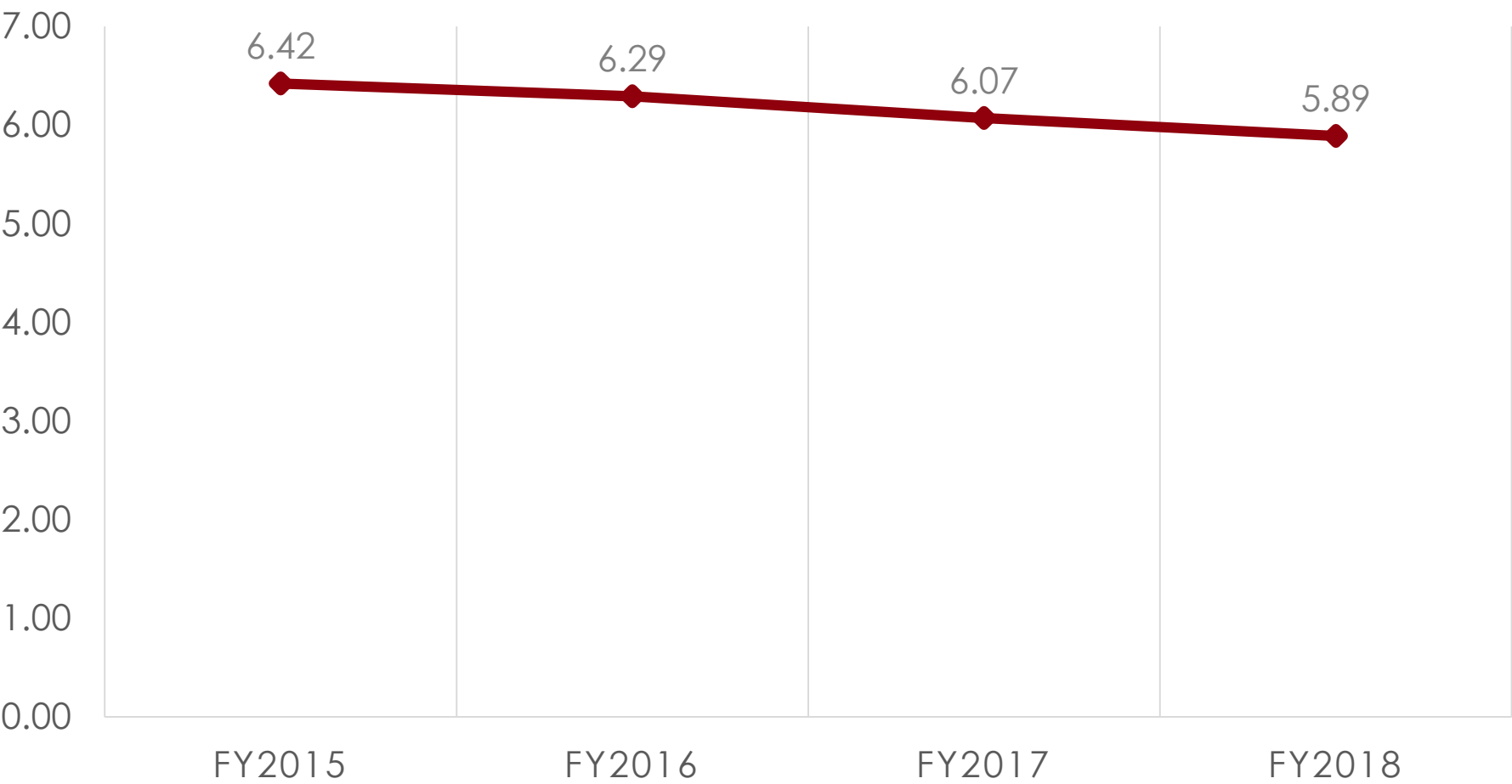
Quality- landscape Tumon



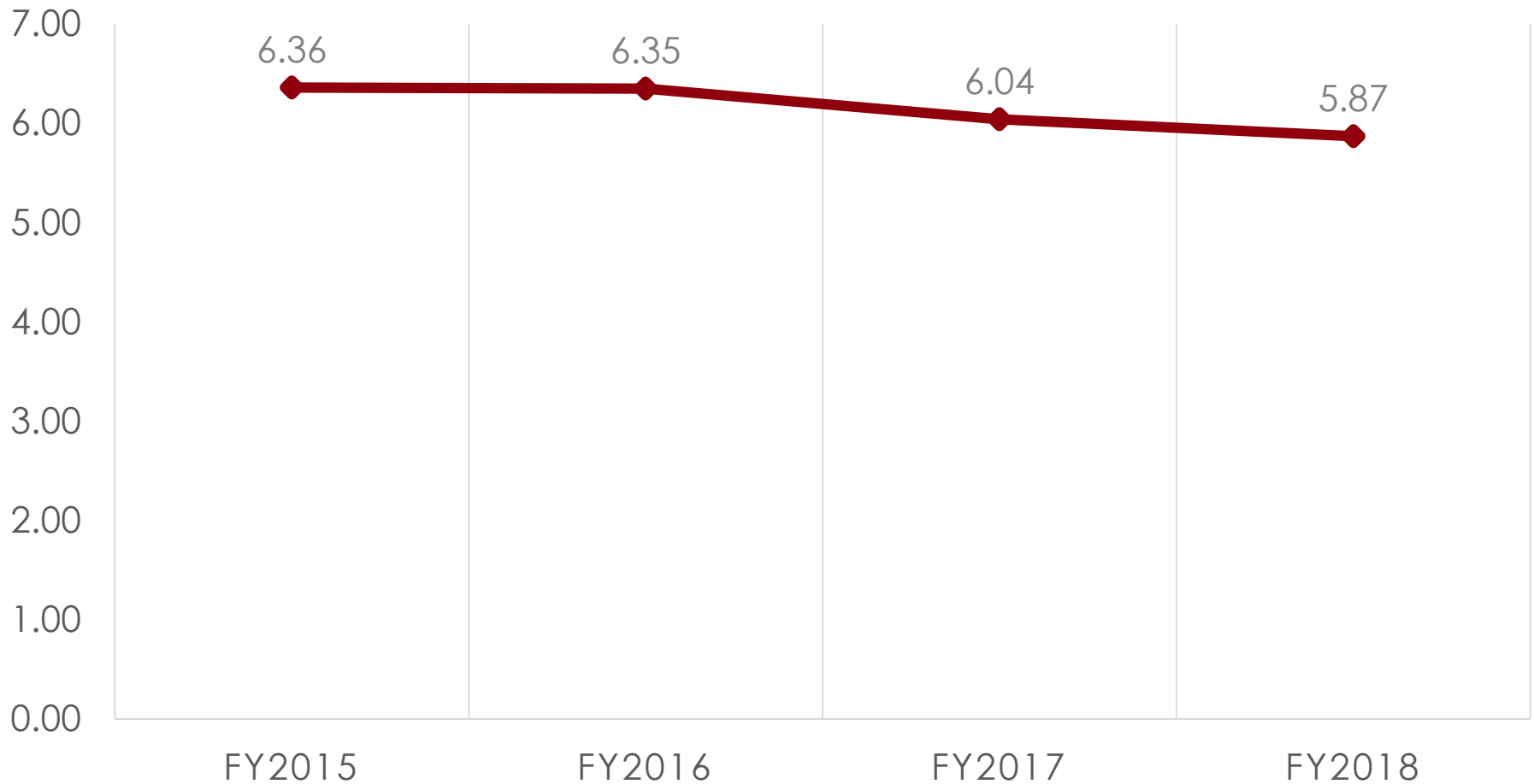
Quality - landscape Guam



Quality - ground handler

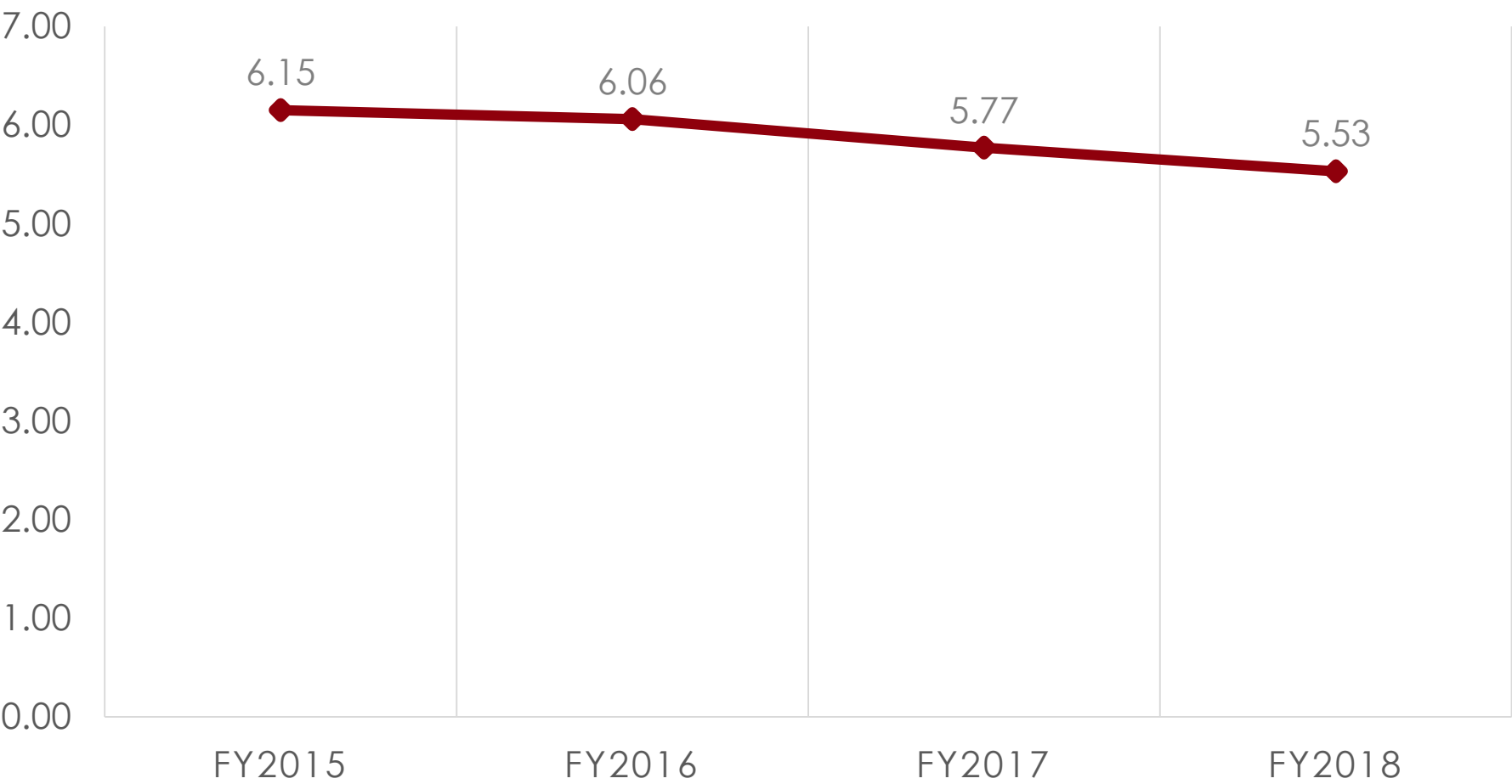


Quality/ Cleanliness - transportation vehicle

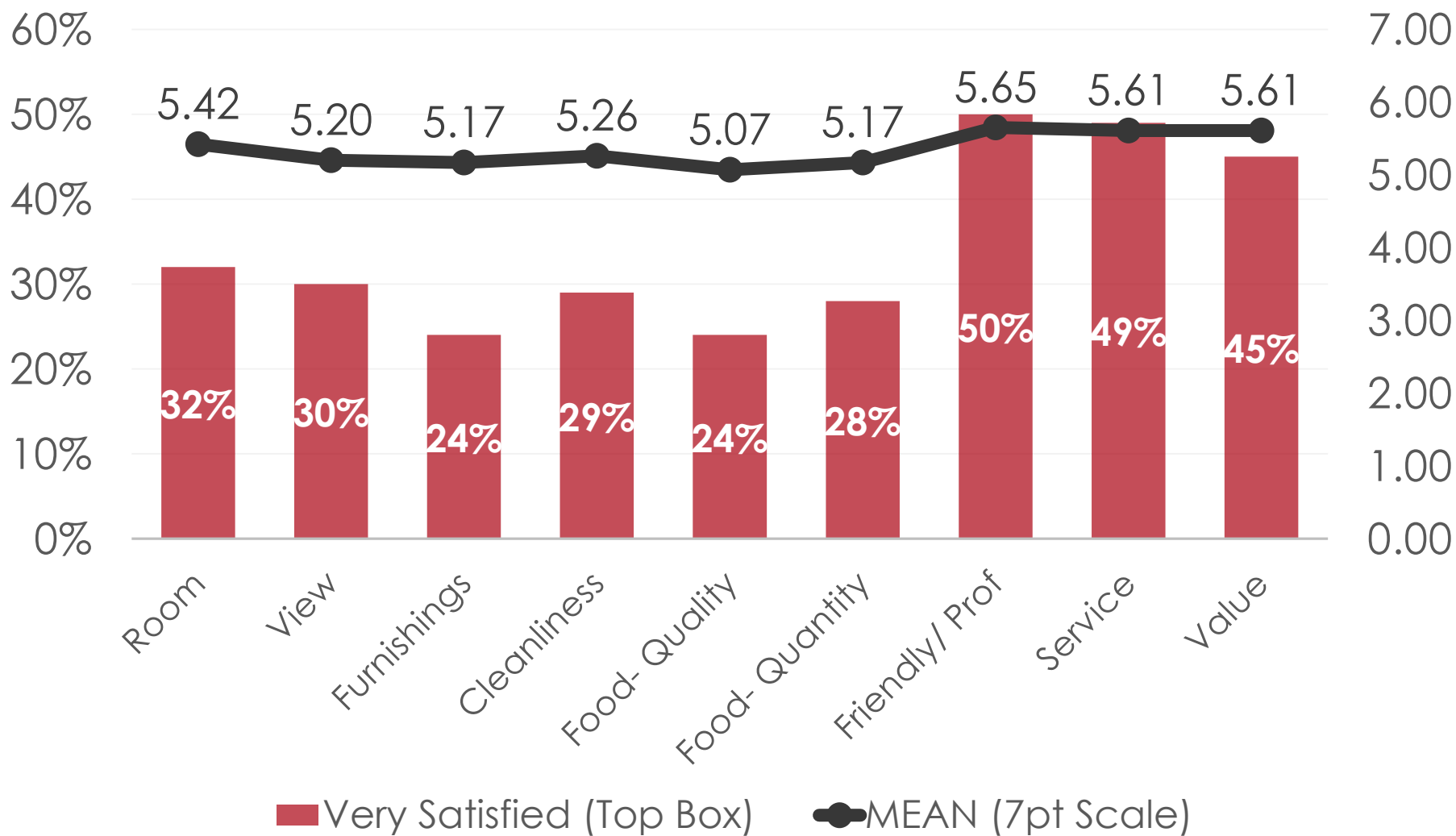


ACCOMMODATIONS

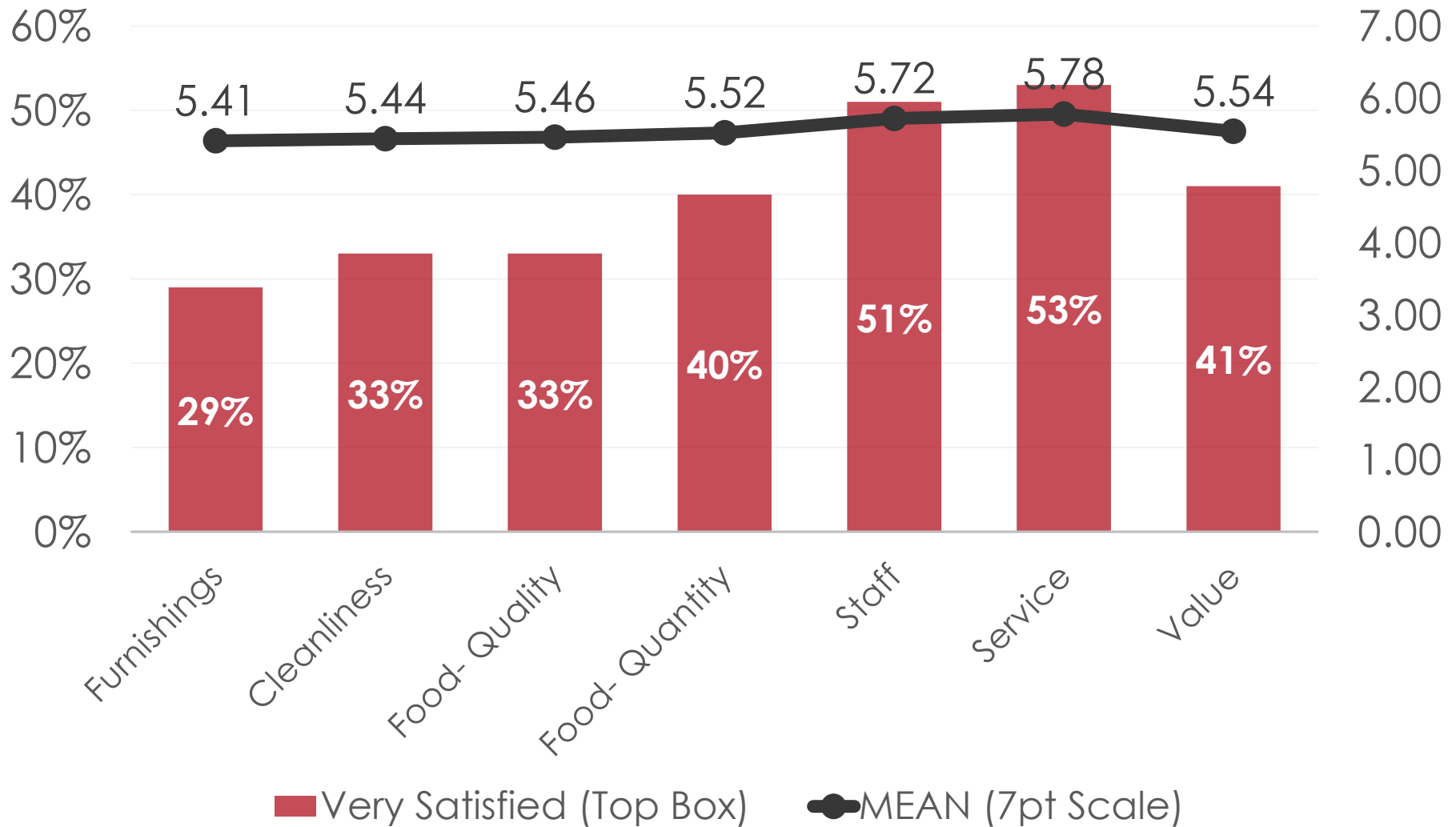
OVERALL SATISFACTION



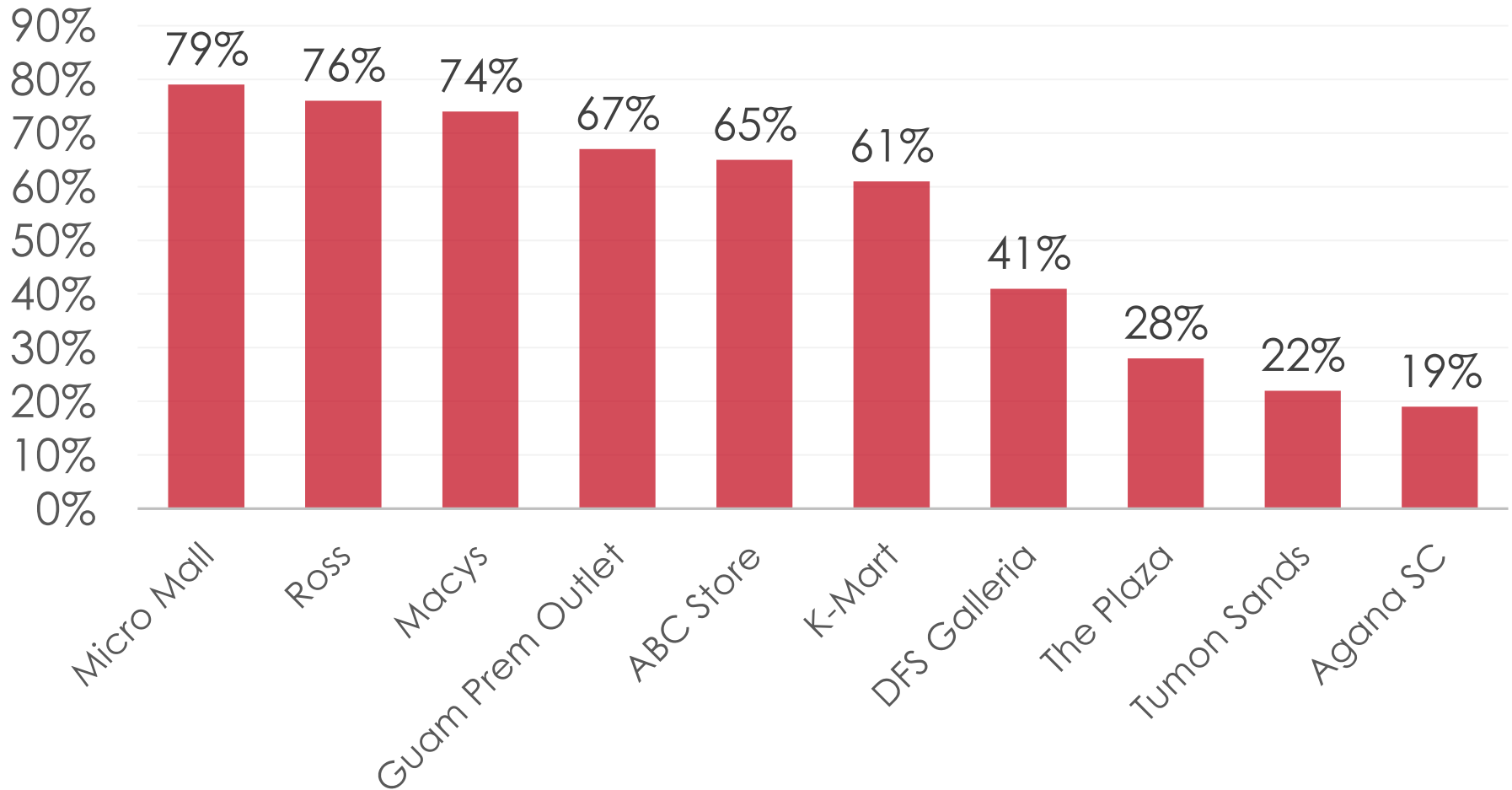
ACCOMMODATIONS – Satisfaction by Category



DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



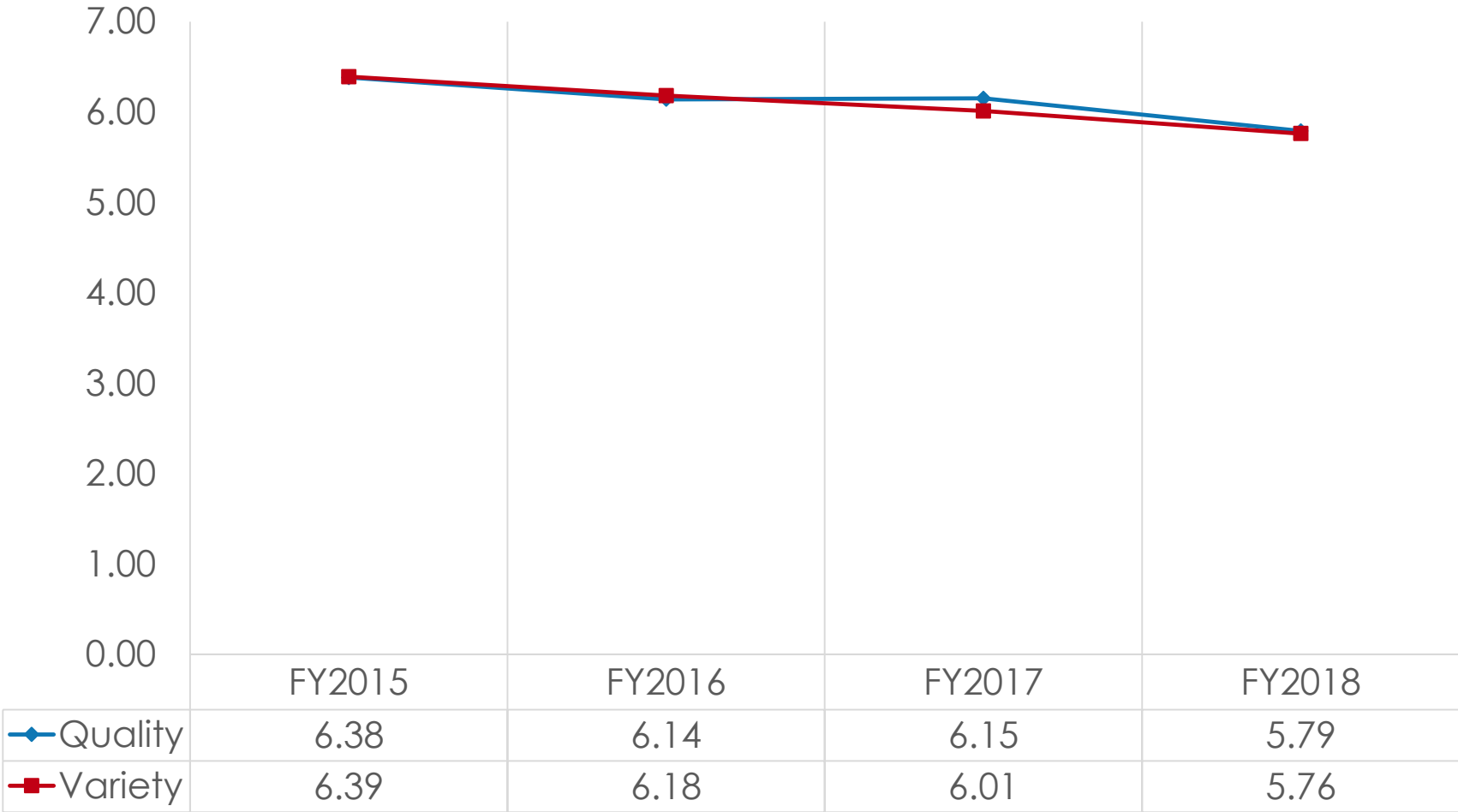
Shopping Malls/ Stores (Top Responses)



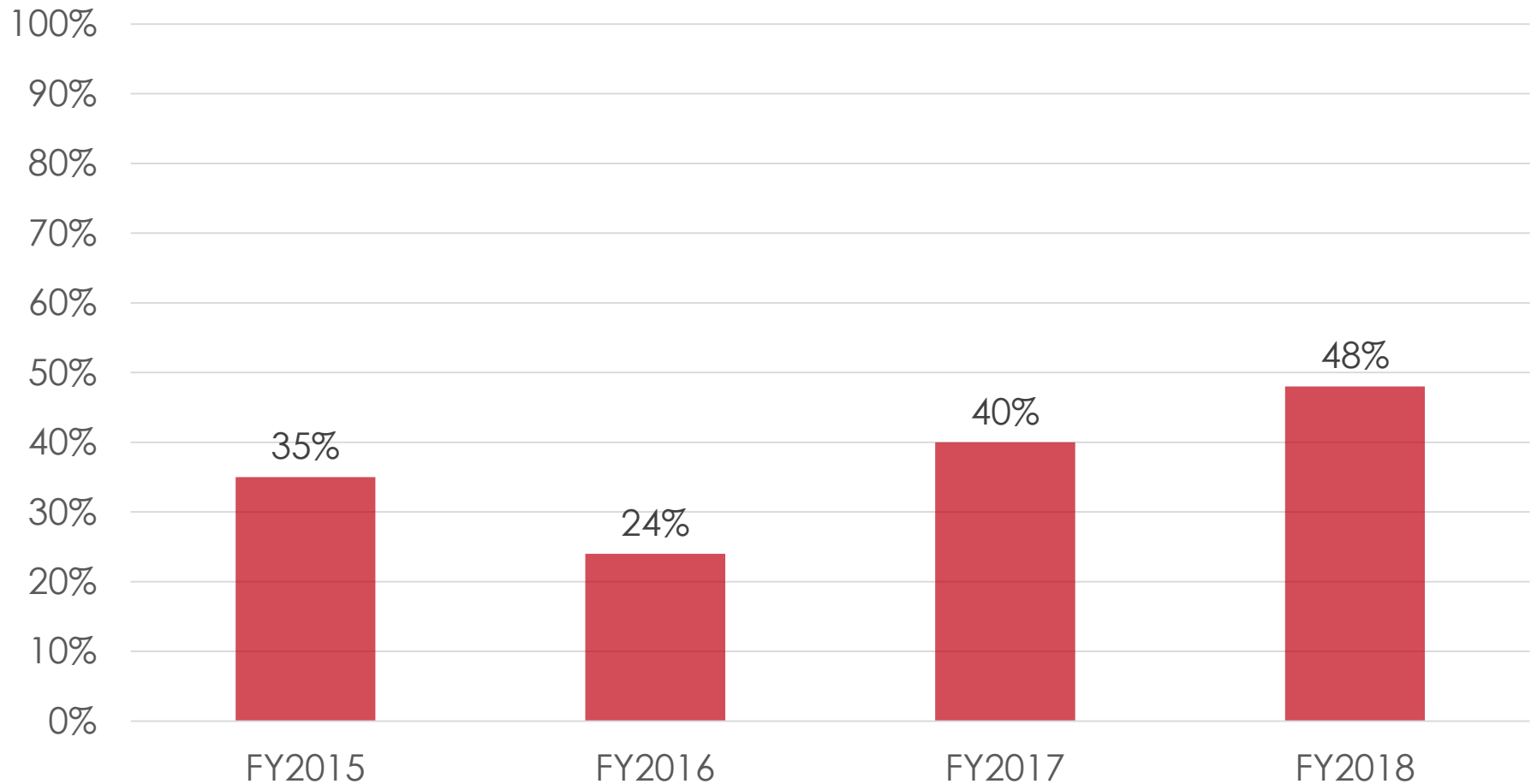
Shopping Malls/ Stores (Top Responses)

FY2015	FY2016	FY2017	FY2018
83% K-Mart 77% Guam Prem Outlet 75% Ross	82% Micronesian Mall 81% K-Mart 78% Ross	85% Micronesian Mall 82% Ross 82% K-Mart	79% Micronesian Mall 76% Ross 74% Macy's

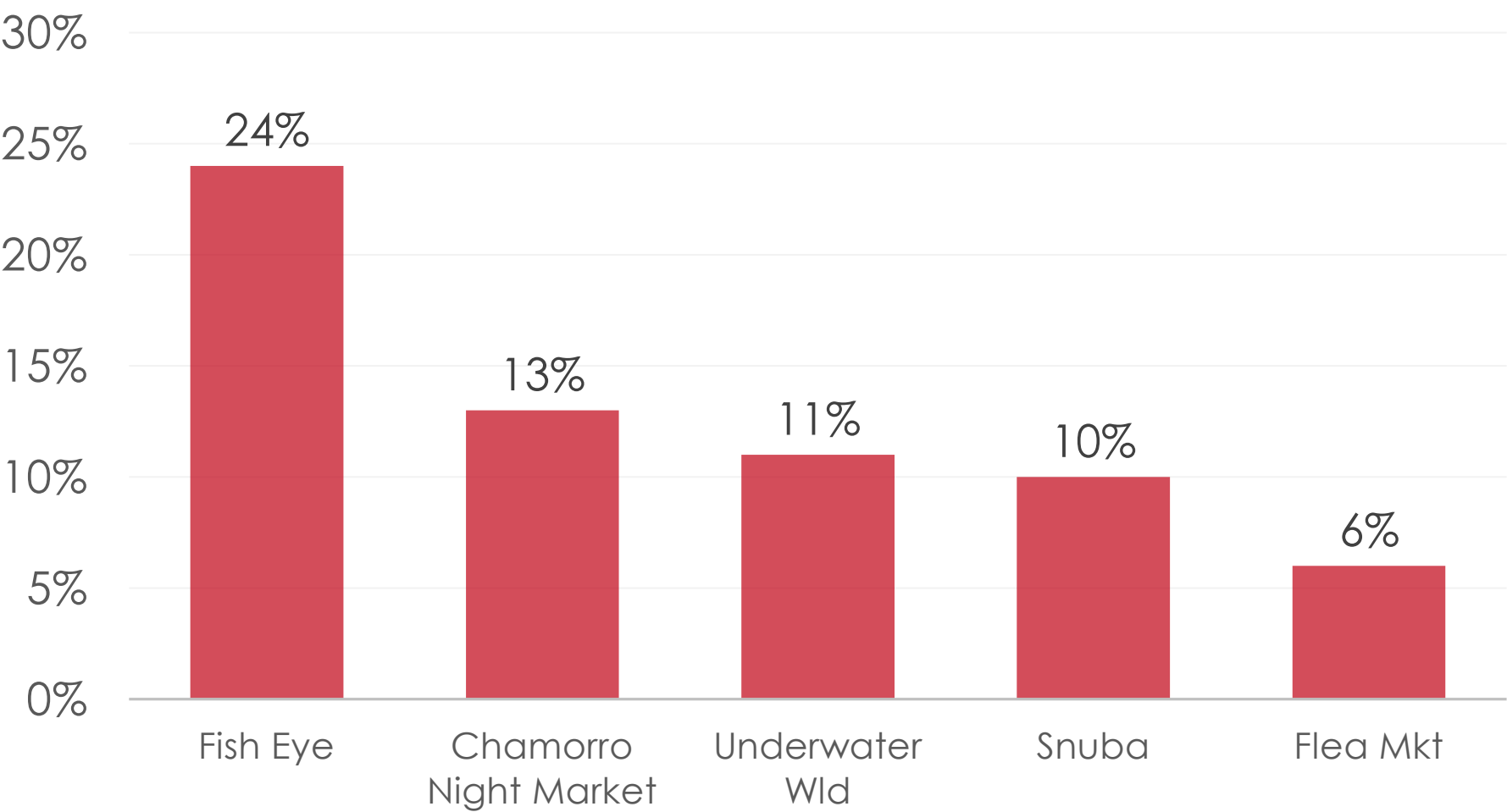
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – Tracking

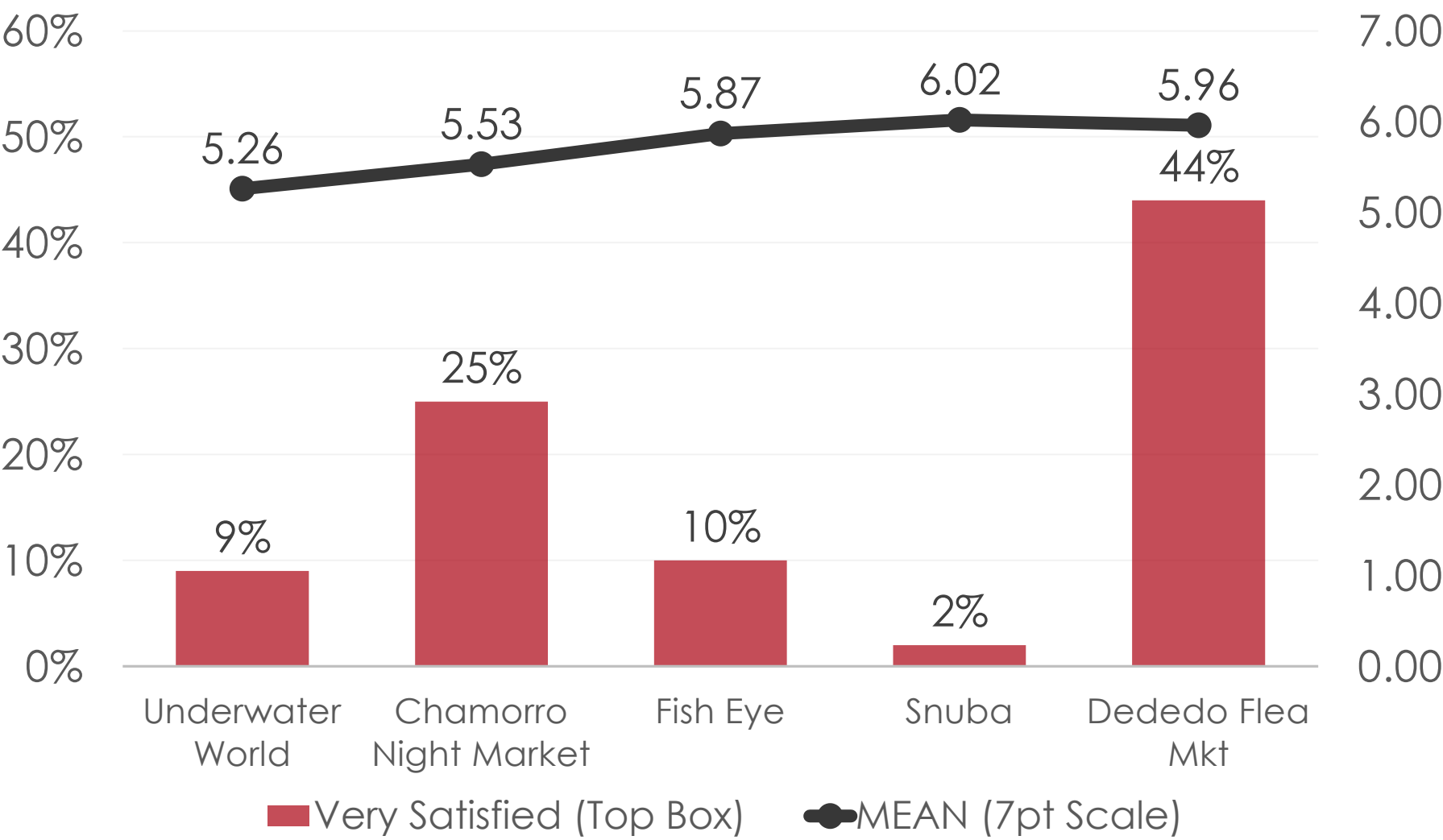


Optional Tour Participation (Top Responses) FY2018

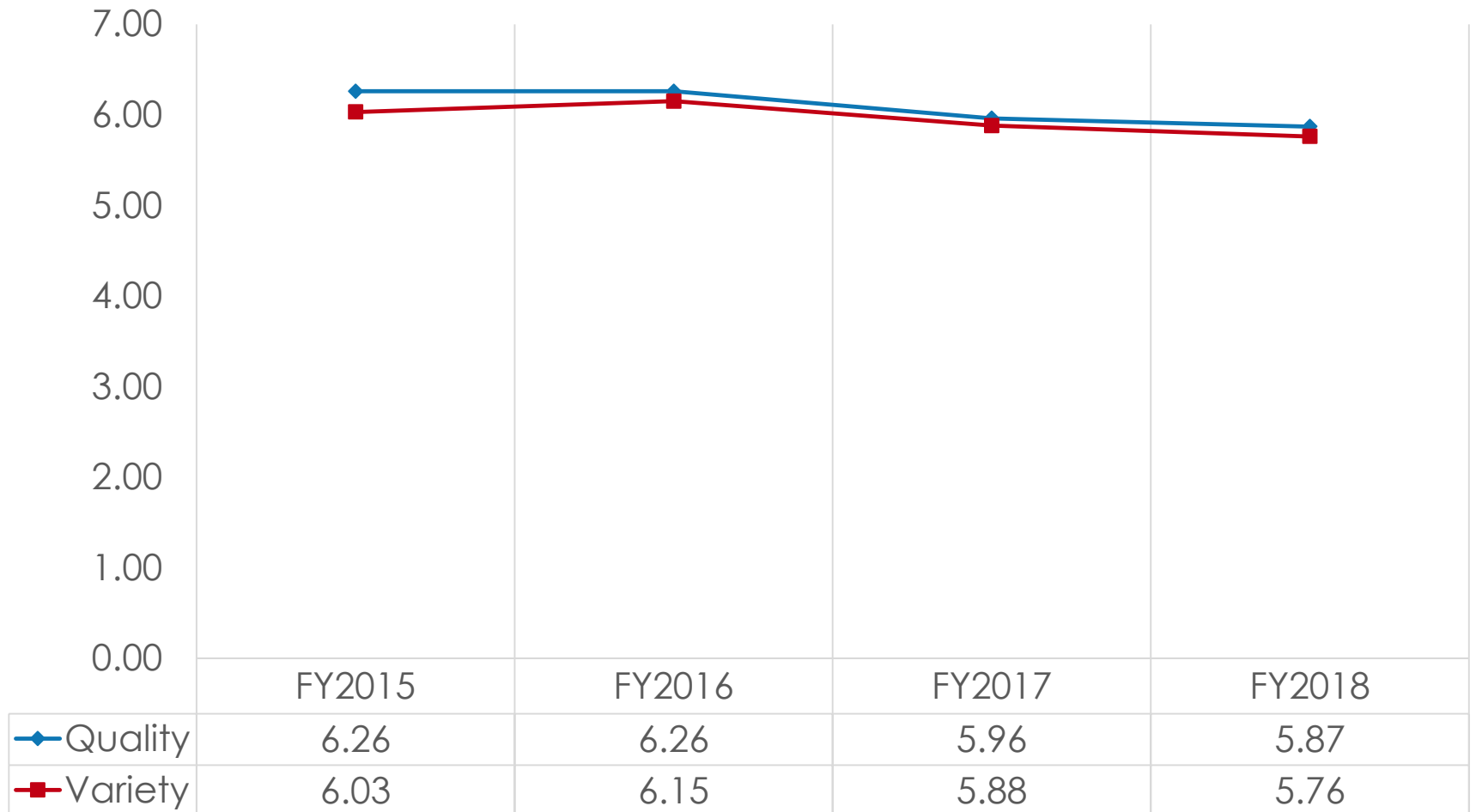


Optional Tour Satisfaction

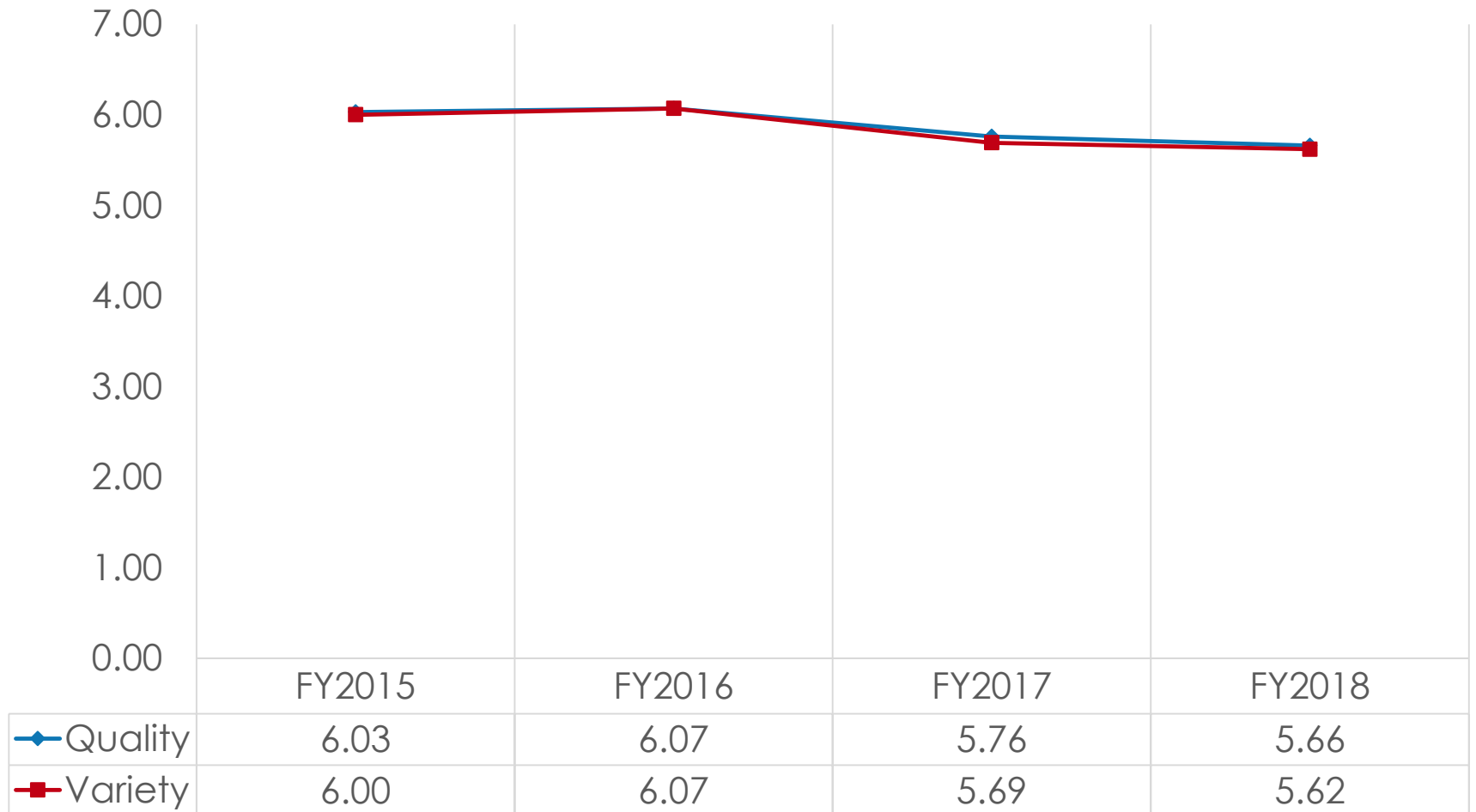
Top Responses only - Participation (5%+)



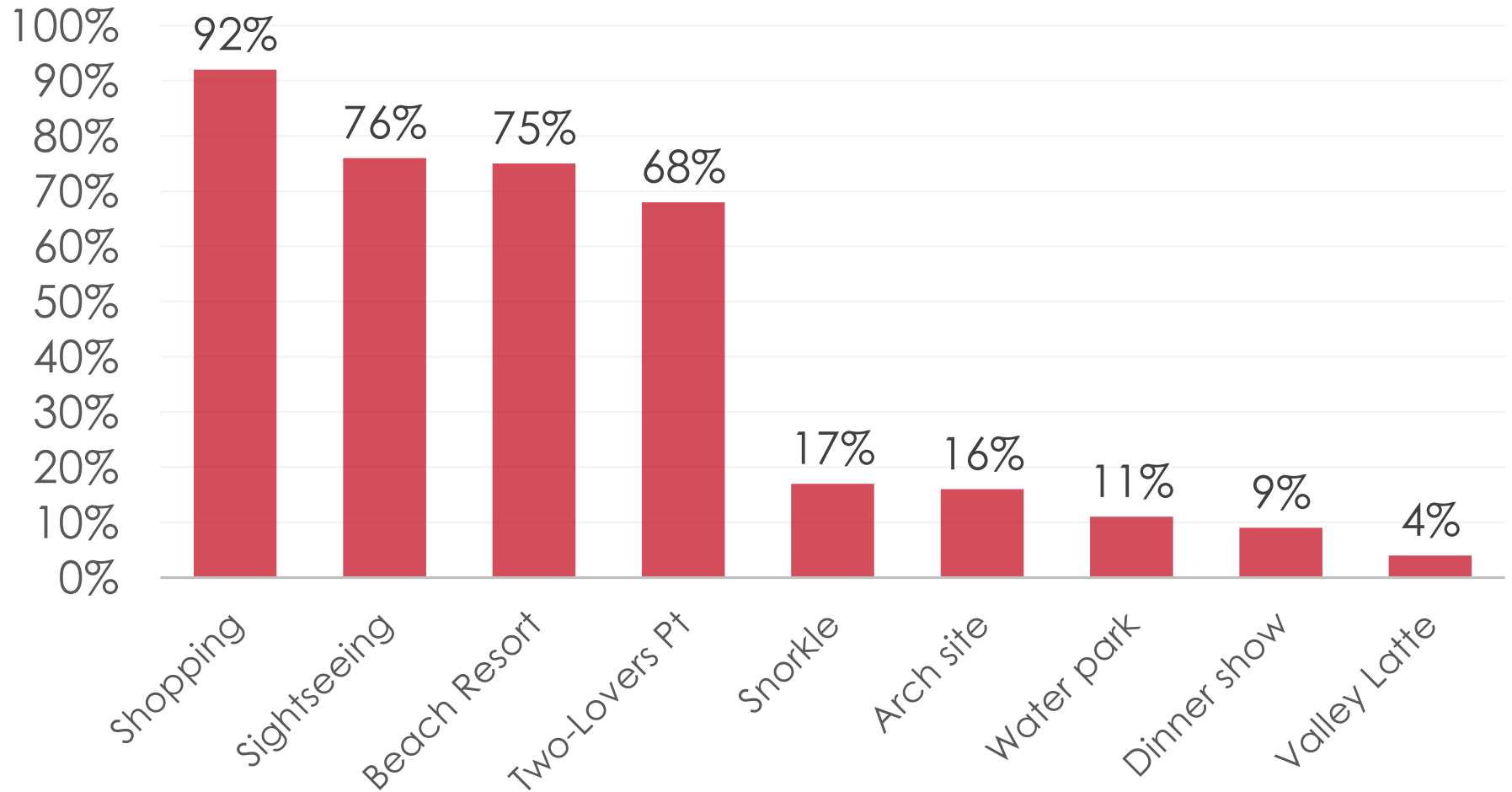
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION



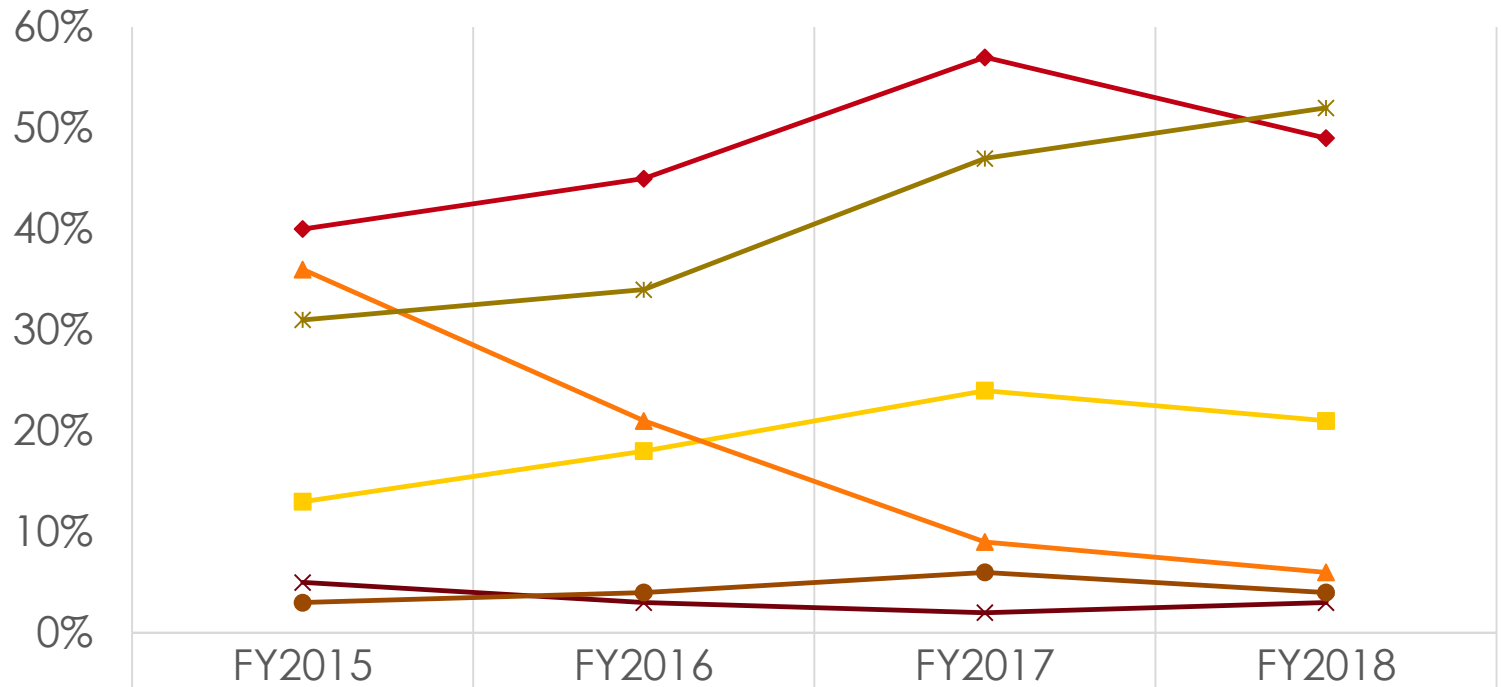
Activities Participation (Top Responses)



SECTION 5

PROMOTIONS

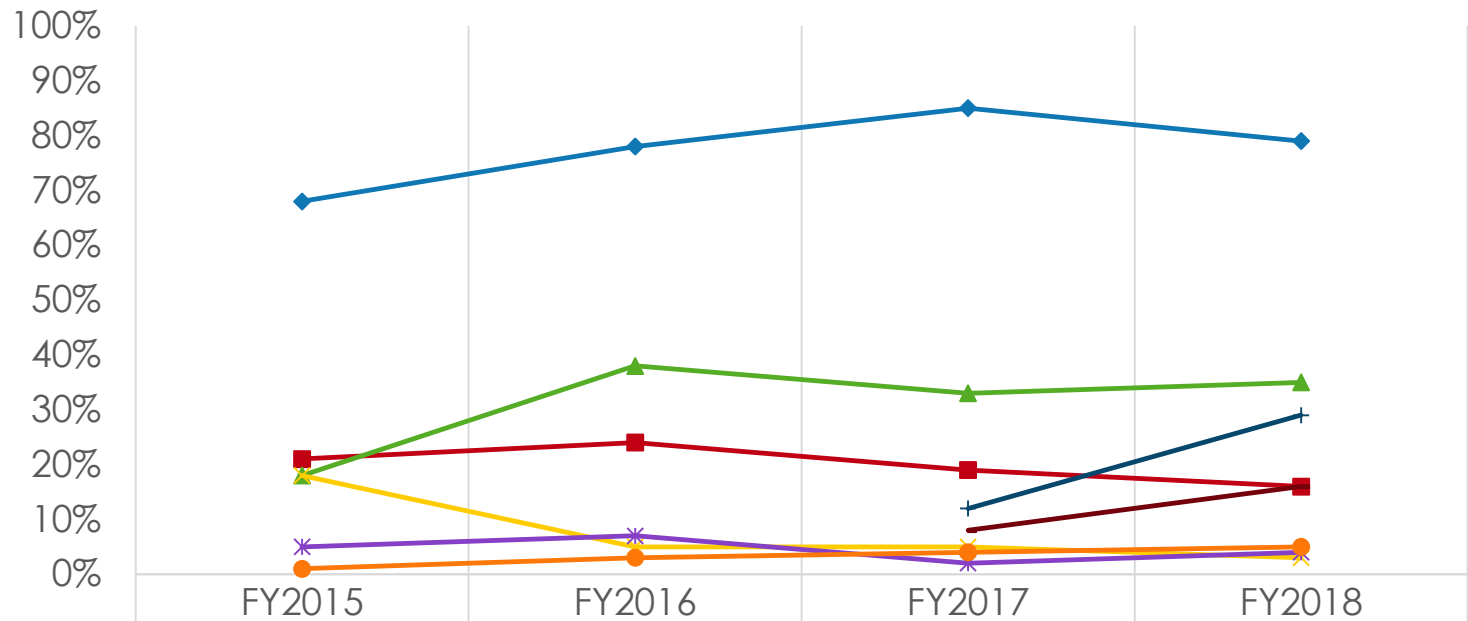
INTERNET- GUAM SOURCES OF INFORMATION



◆ Search Engines	40%	45%	57%	49%
■ Blogs	13%	18%	24%	21%
▲ None	36%	21%	9%	6%
✕ Q&A sites	5%	3%	2%	3%
* Social network	31%	34%	47%	52%
● Forums	3%	4%	6%	4%

INTERNET- SOURCES OF INFORMATION

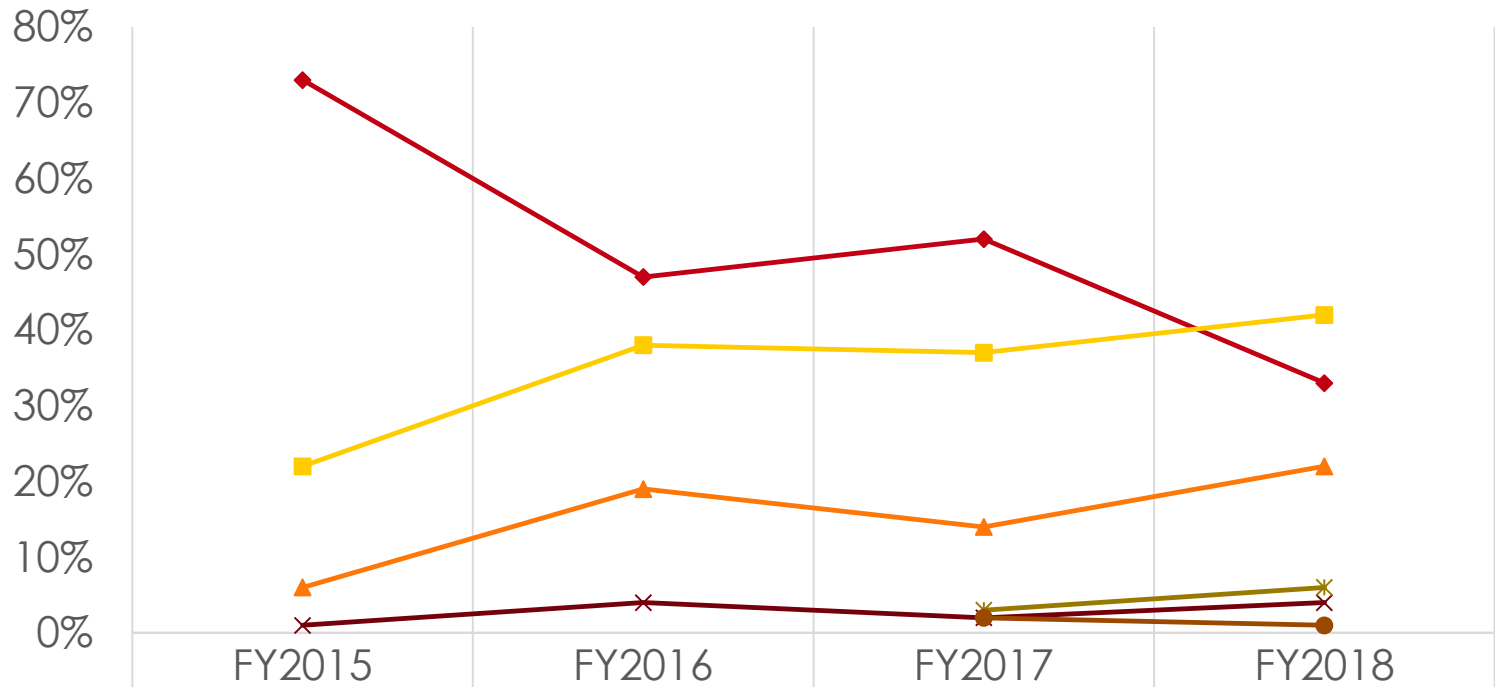
Things to do on Guam



Google	68%	78%	85%	79%
Yahoo	21%	24%	19%	16%
Facebook	18%	38%	33%	35%
None	18%	5%	5%	3%
Other	5%	7%	2%	4%
Twitter	1%	3%	4%	5%
Instagram			12%	29%
Online booking site			8%	16%

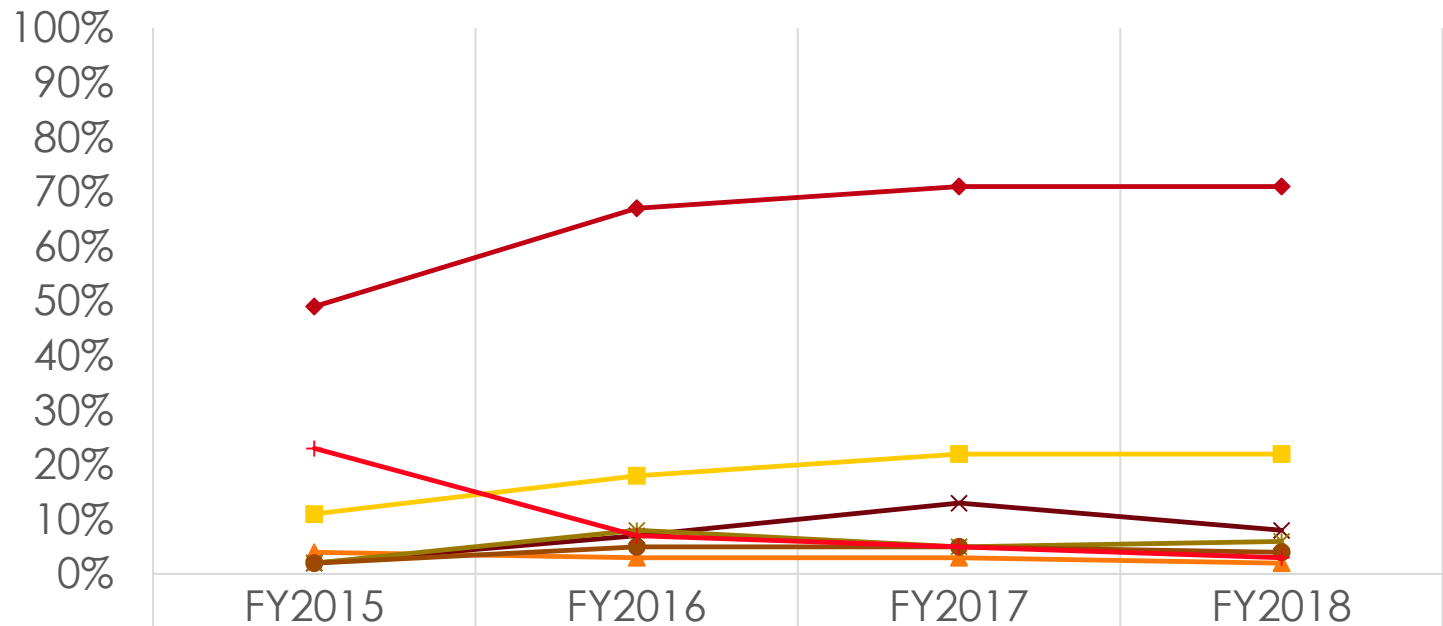
INTERNET- SOURCES OF INFORMATION

GVB



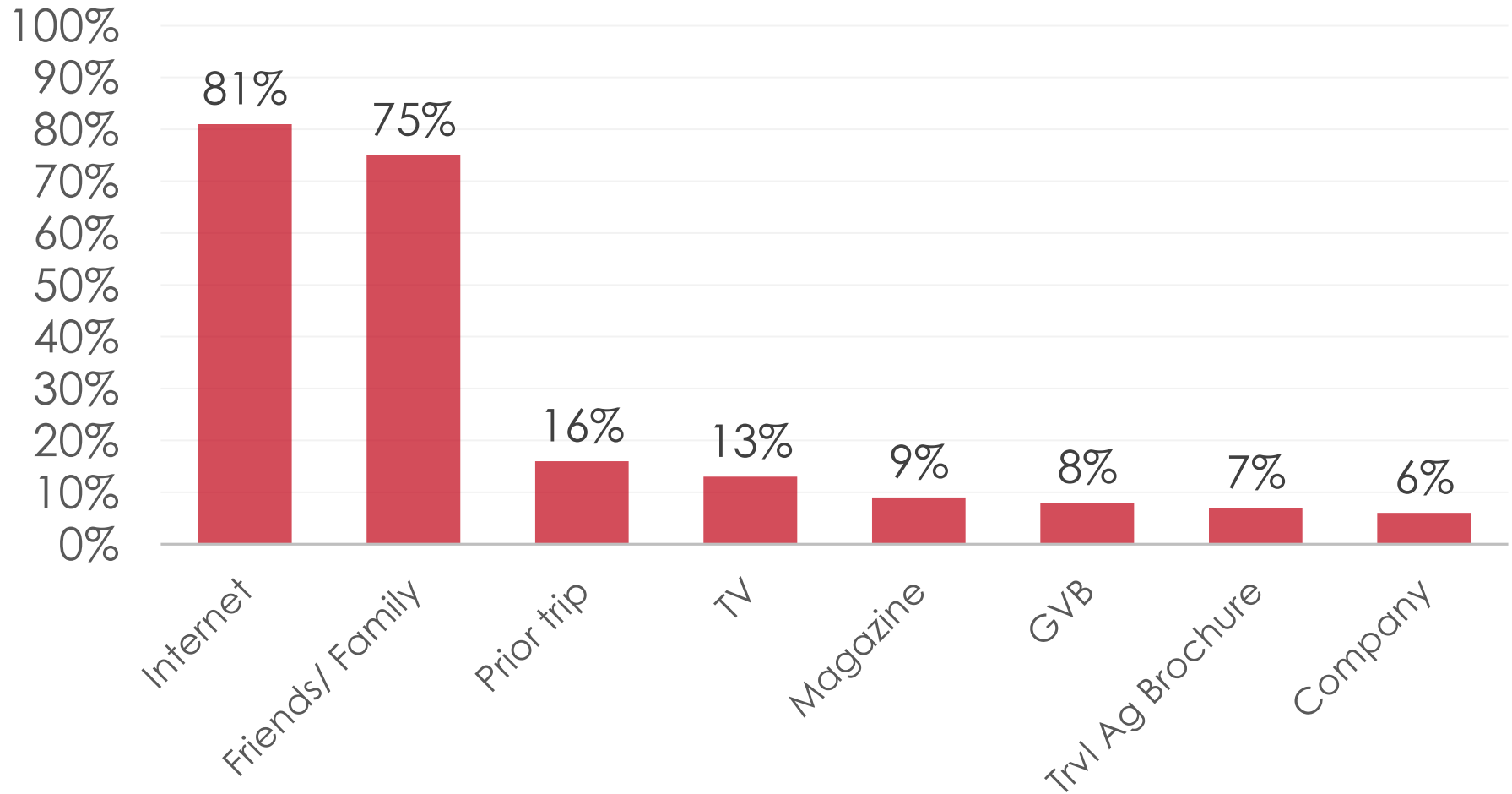
◆ None	73%	47%	52%	33%
■ GVB Website	22%	38%	37%	42%
▲ GVB Facebook	6%	19%	14%	22%
✕ GVB Twitter	1%	4%	2%	4%
* GVB Instagram			3%	6%
● GVB Café			2%	1%

TRAVEL MOTIVATION



◆ Friends/ Family	49%	67%	71%	71%
■ Internet	11%	18%	22%	22%
▲ Travel Agent	4%	3%	3%	2%
✕ Social media	2%	7%	13%	8%
✱ Travel shows	2%	8%	5%	6%
● Magazine	2%	5%	5%	4%
+ Company/ Bus Trip	23%	7%	5%	3%

PRE-ARRIVAL SOURCES OF INFORMATION

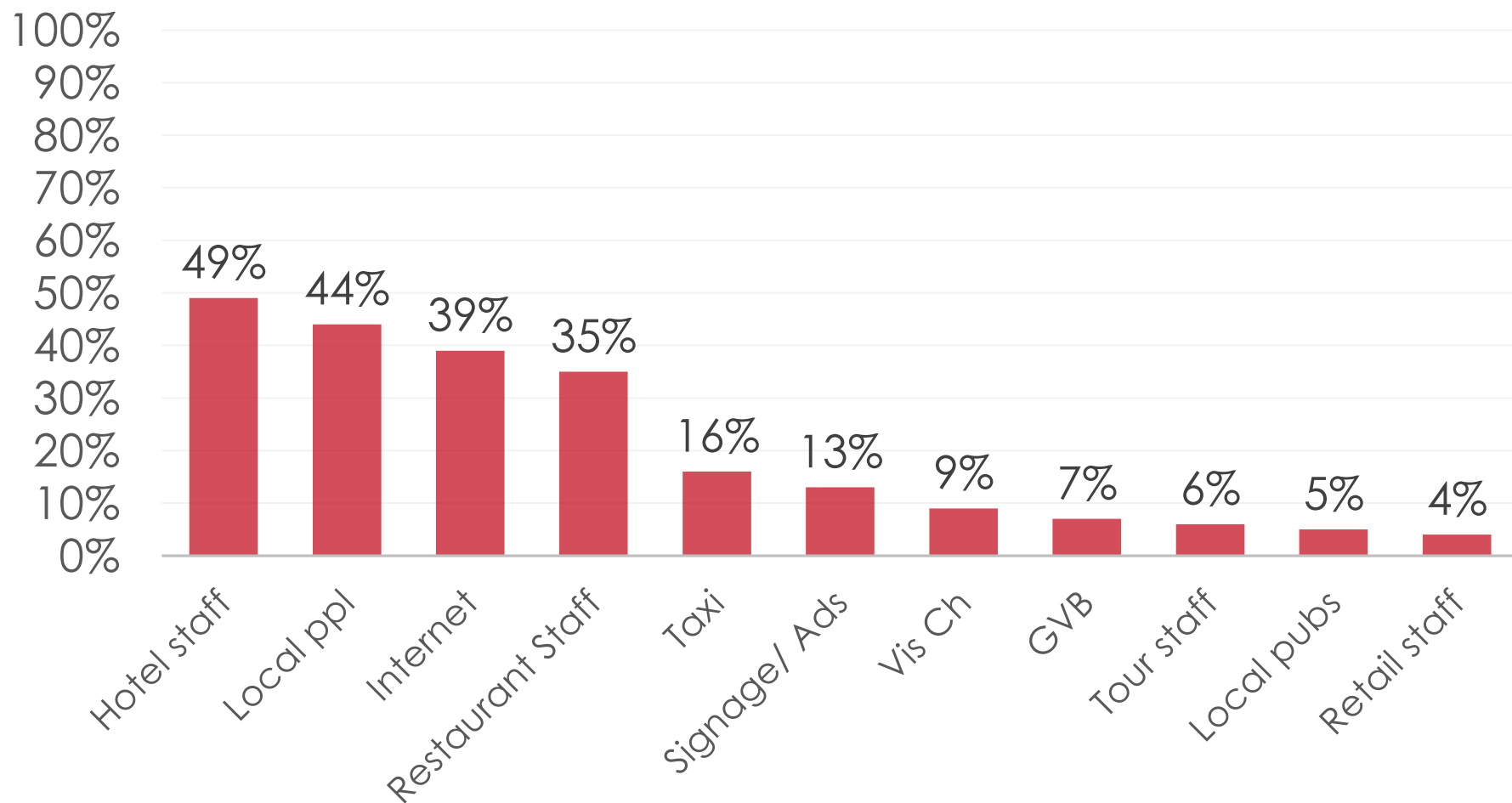


PRE-ARRIVAL SOURCES OF INFORMATION

FY2015	FY2016	FY2017	FY2018
43% Internet 38% Recommend 5% Brochure	50% Internet 29% Recommend 7% Prior trip	83% Internet/ App 73% Recommend 23% Prior trip	81% Internet/ App 75% Recommend 16% Prior trip

ONISLE

SOURCES OF INFORMATION



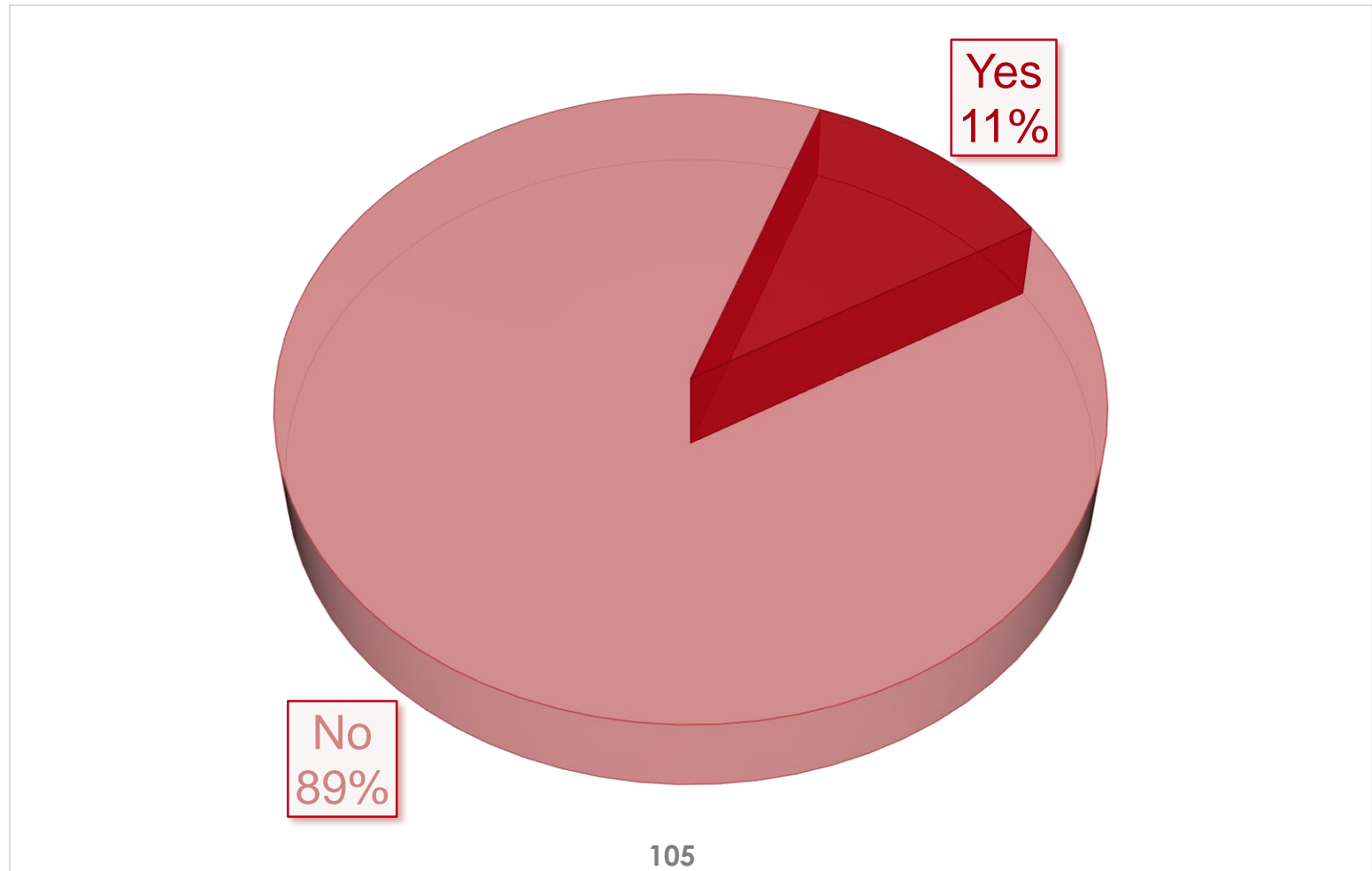
ON-ISLE SOURCES OF INFORMATION

FY2015	FY2016	FY2017	FY2018
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	49% Hotel staff 44% Local people 39% Internet/ App

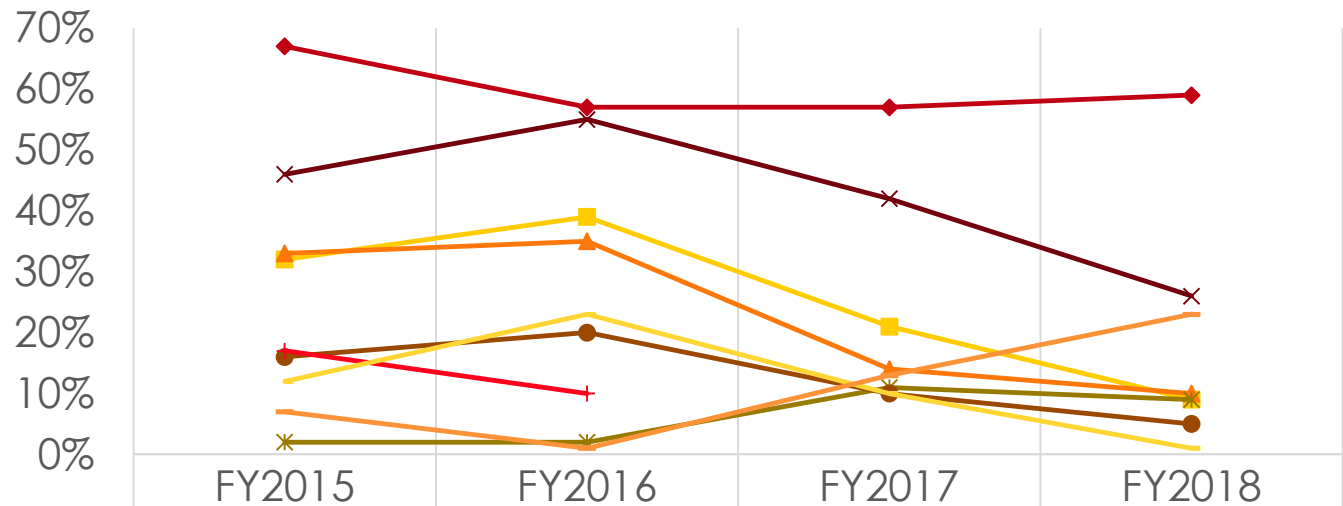
SECTION 6

FUTURE TRAVEL TO GUAM

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

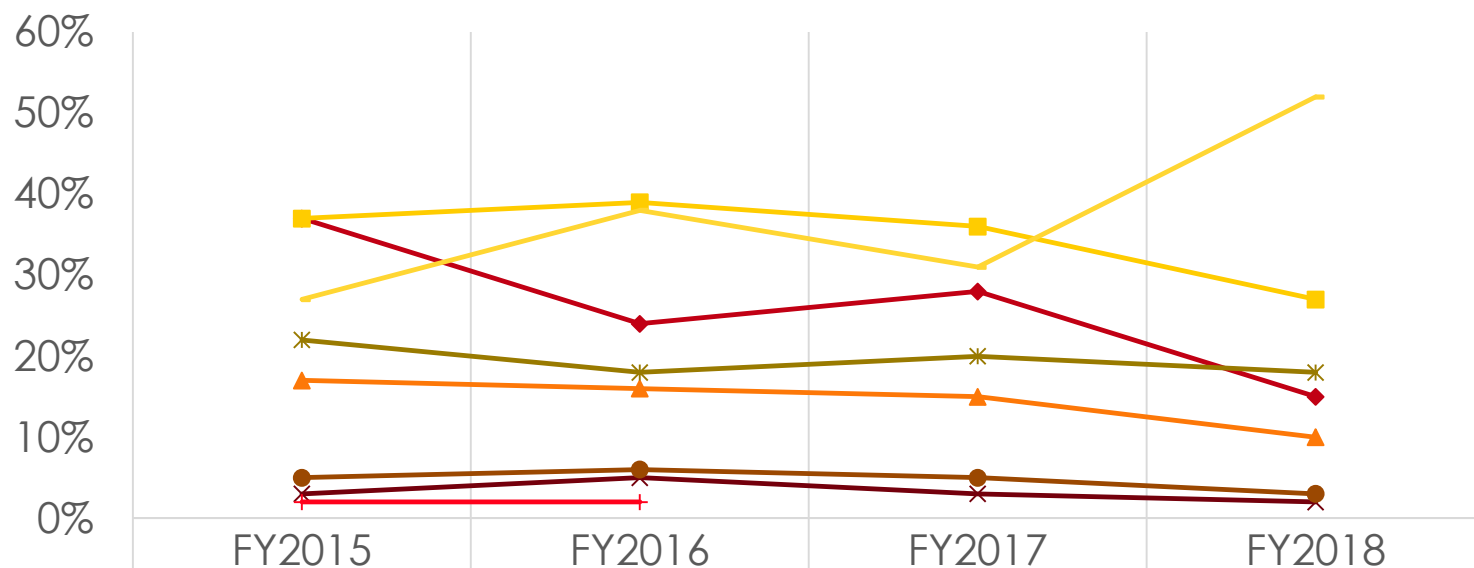


FUTURE TRAVEL CONCERNS



◆ Safety	67%	57%	57%	59%
■ Terrorism	32%	39%	21%	9%
▲ Food	33%	35%	14%	10%
✕ Expense	46%	55%	42%	26%
✱ Discrimination	2%	2%	11%	9%
● Should spend at home	16%	20%	10%	5%
+ Other	17%	10%		
— Don't know	12%	23%	10%	1%
— No concerns	7%	1%	13%	23%

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

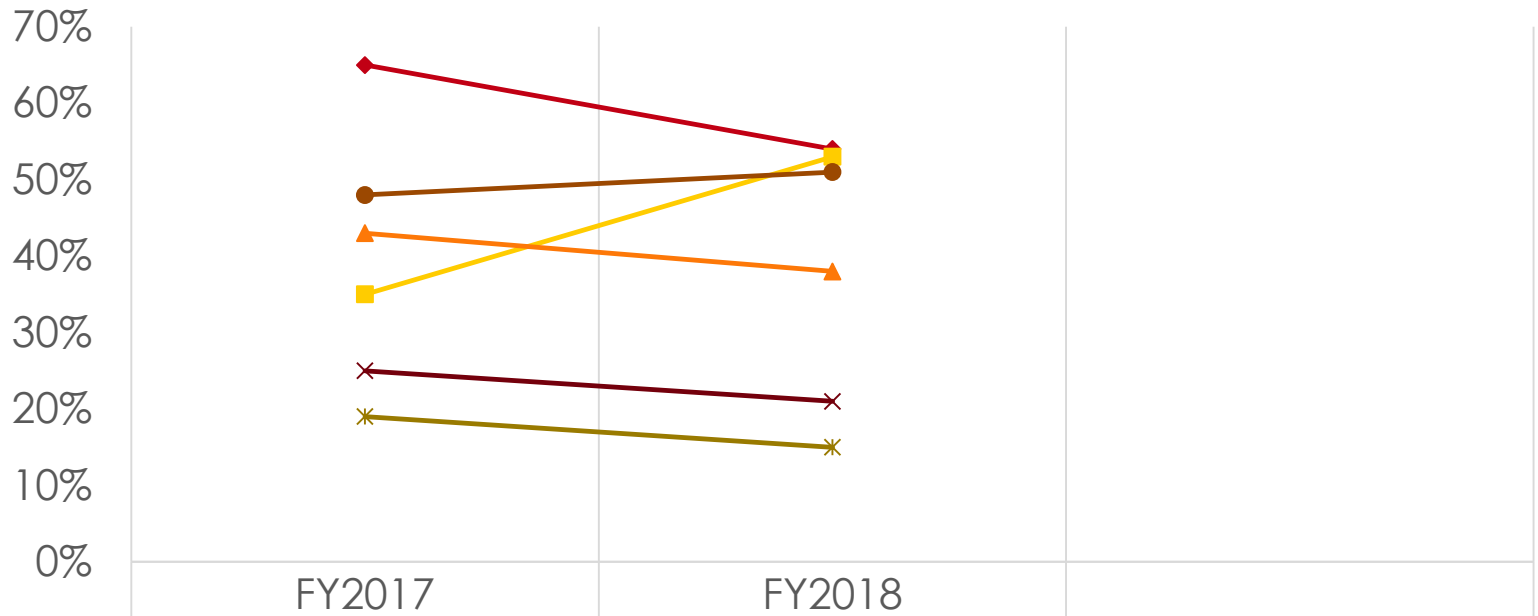


◆ More time	37%	24%	28%	15%
■ Budget/ money	37%	39%	36%	27%
▲ Flt Schedule	17%	16%	15%	10%
✕ Less restrictions	3%	5%	3%	2%
* Things to do	22%	18%	20%	18%
● Pkg-longer stay	5%	6%	5%	3%
+ Other	2%	2%		
— Nothing	27%	38%	31%	52%

SECTION 7

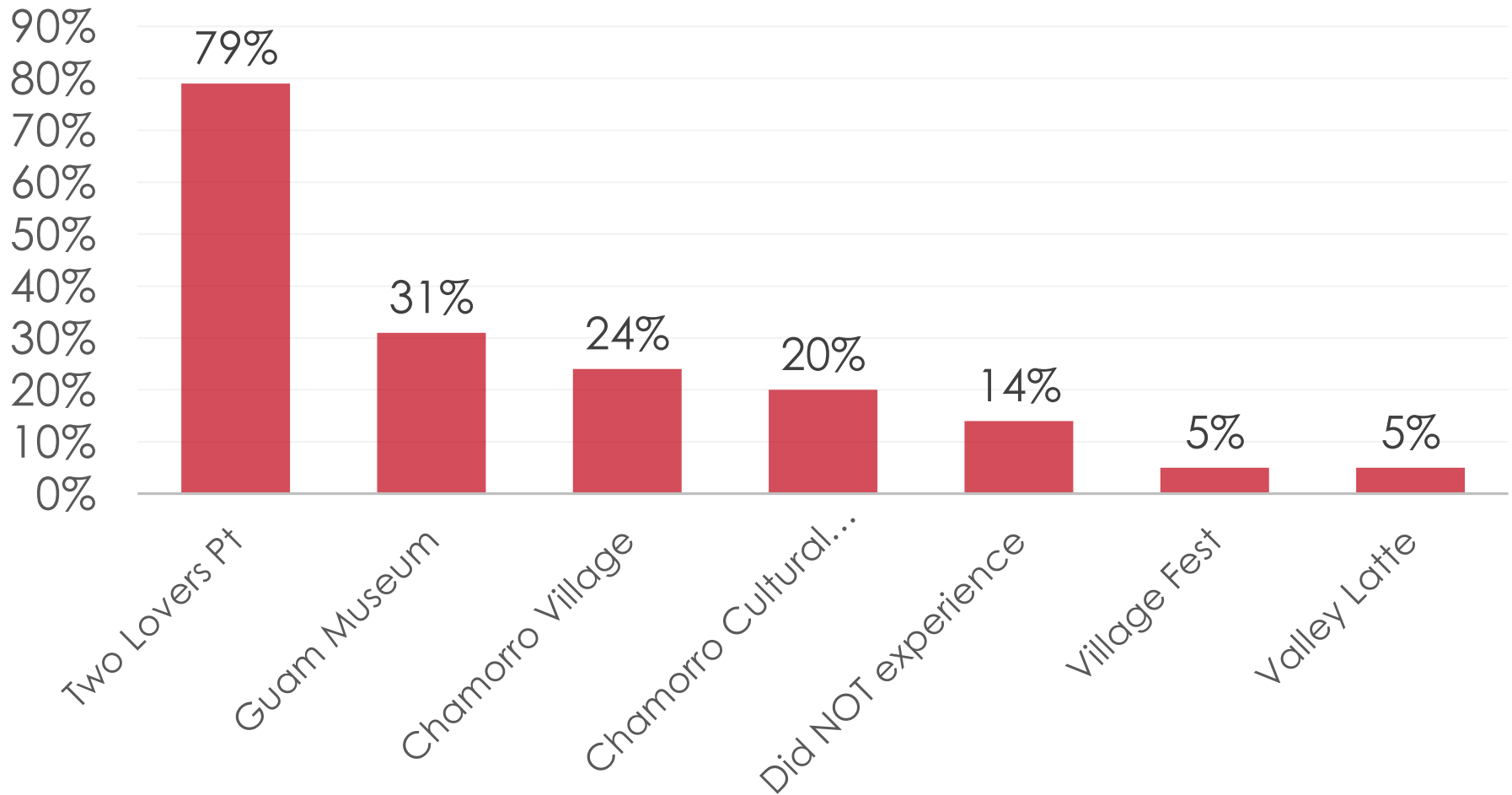
GUAM CULTURE

EXPERIENCED- CHAMORRO/ HAFA ADAI SPIRIT

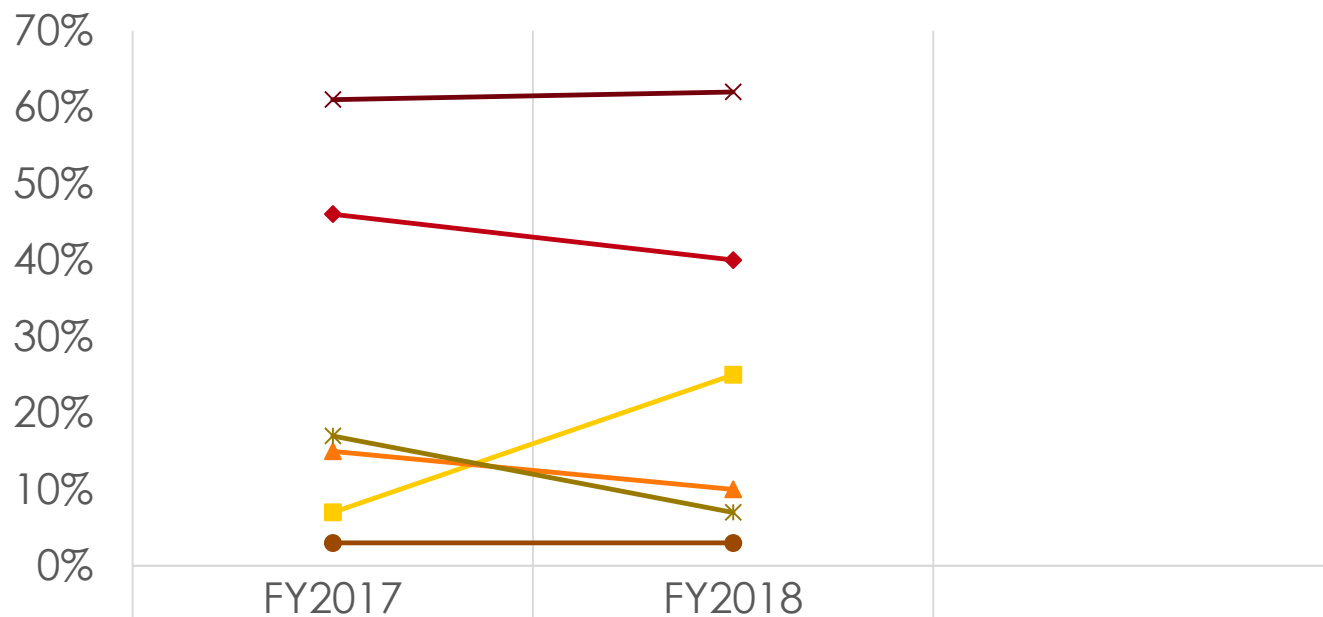


◆ Beaches	FY2017	65%	FY2018	54%
■ Local music		35%		53%
▲ Local people		43%		38%
✕ Night market		25%		21%
* None		19%		15%
● Local food		48%		51%

EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS

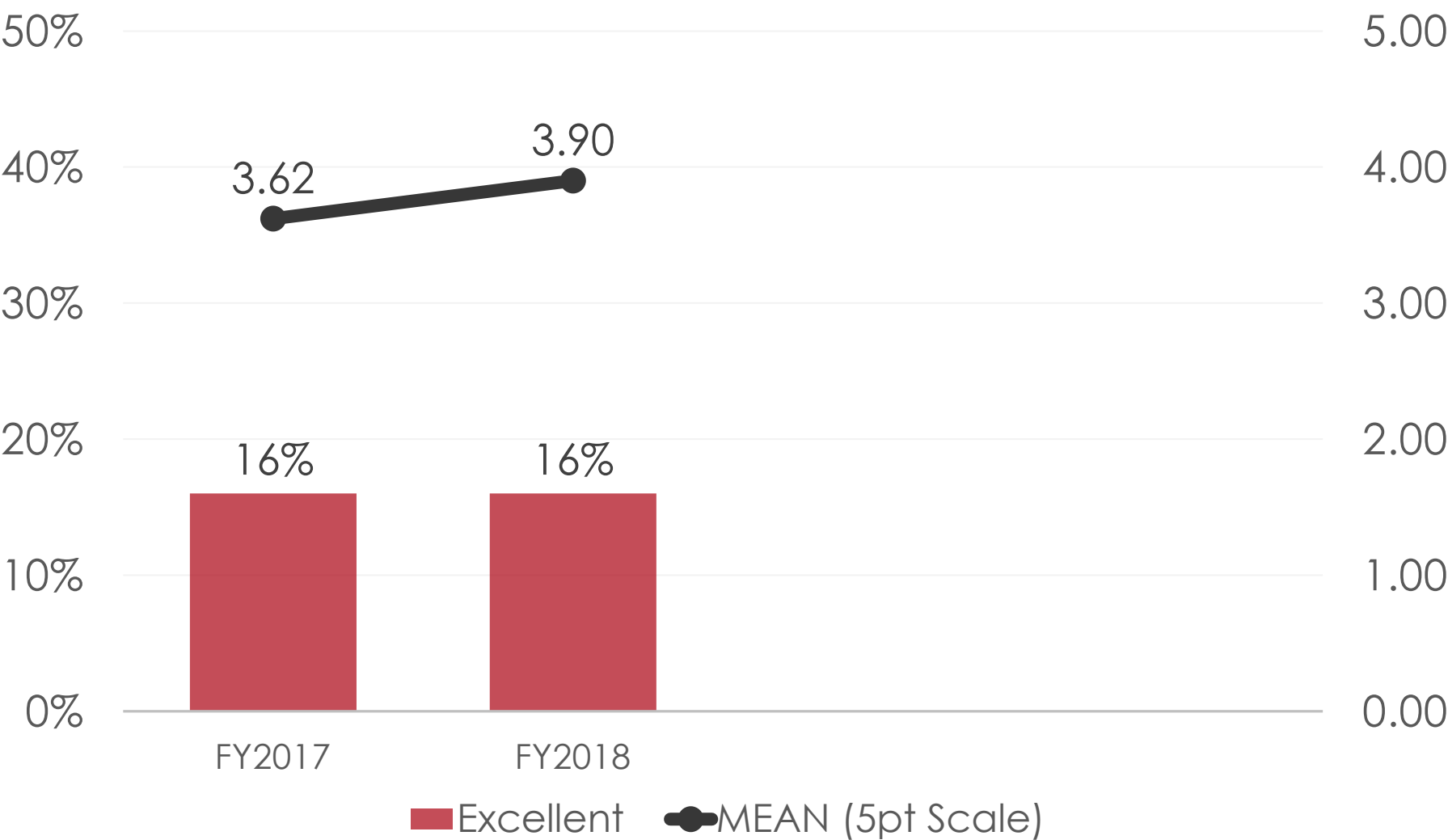


SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS

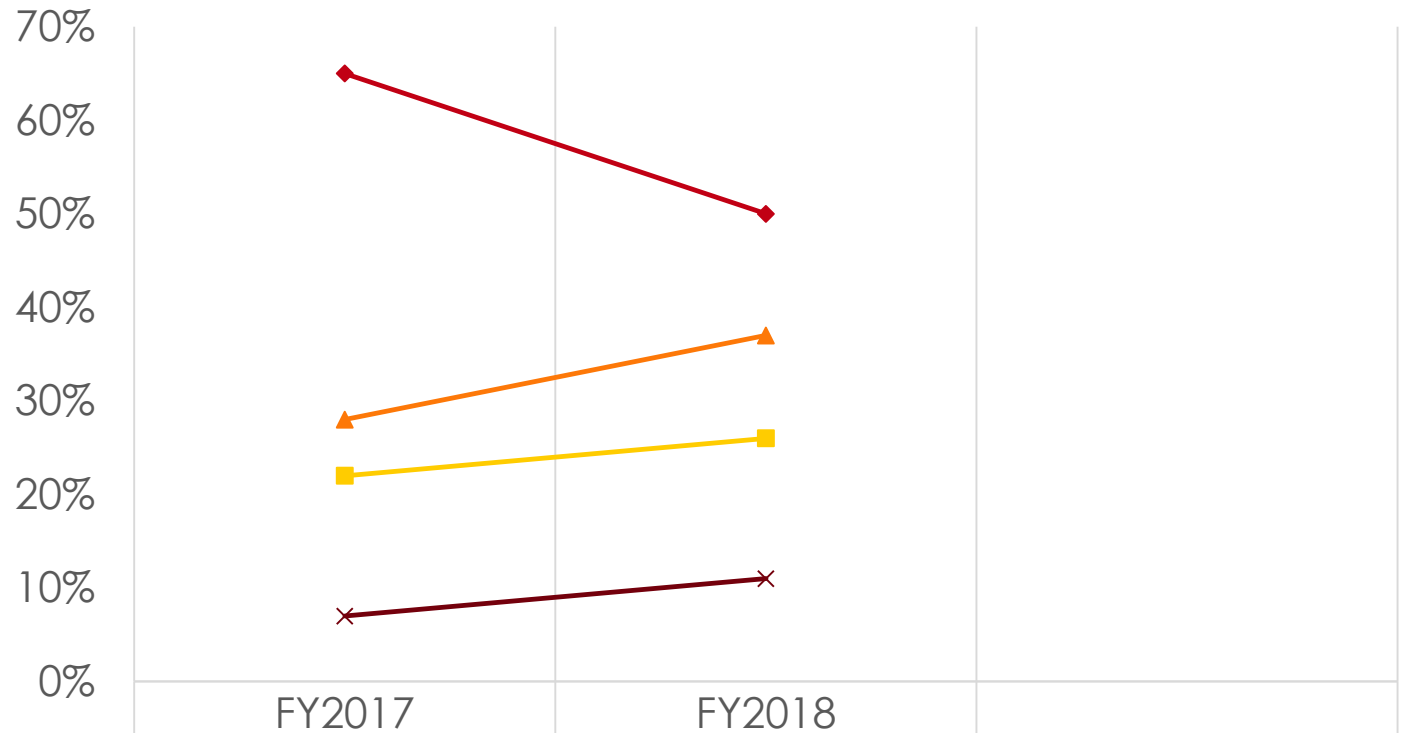


◆ Internet	46%	40%	
■ Travel agency	7%	25%	
▲ Guides/ Brochures	15%	10%	
✕ Family/ friends	61%	62%	
* Hotel staff	17%	7%	
● Newspaper/ Magazine	3%	3%	

SATISFACTION- CULTURAL ACTIVITY/EVENTS



OBSTACLES- CULTURAL ACTIVITY/EVENTS



◆ Scheduling	65%	50%	
■ Did not know where	22%	26%	
▲ Unaware	28%	37%	
✕ Did not want to	7%	11%	

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 2018	
Drivers:	1-4 Qtr. Overall 2018 rank
Quality & Cleanliness of beaches & parks	
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	2
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	1
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	72.2%

Drivers of Overall Satisfaction

- **Overall satisfaction** with Filipino visitor's experience on Guam is driven by two significant factors in the 2018 Period. By rank order they are:
 - **Quality/cleanliness of parks, and**
 - **Quality of shopping.**
- With these factors, the overall r^2 is .722 meaning that **72.2% of overall satisfaction is accounted for by these factors.**

Drivers of On Isle Expenditures

Drivers of Per Person On Island Expenditures, Annual 2018	
Drivers:	Overall 2018 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 Filipino visitors on Guam is driven by no significant factors in the 2018 period