Guam Visitors Bureau

Philippine Visitor Tracker Exit Profile & Market Segmentation Report

FY2018

QTR.4 (JUL-SEPT. 2018)

Prepared by: Anthology Research

#instaGuam

[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   Filipino   speaking   interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.

- A total of **110** 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 **110** is +/- 9.34 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 +/- 9.34 percentage points.

[A]

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.

[A]

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

[A]

Key Highlighted Segments
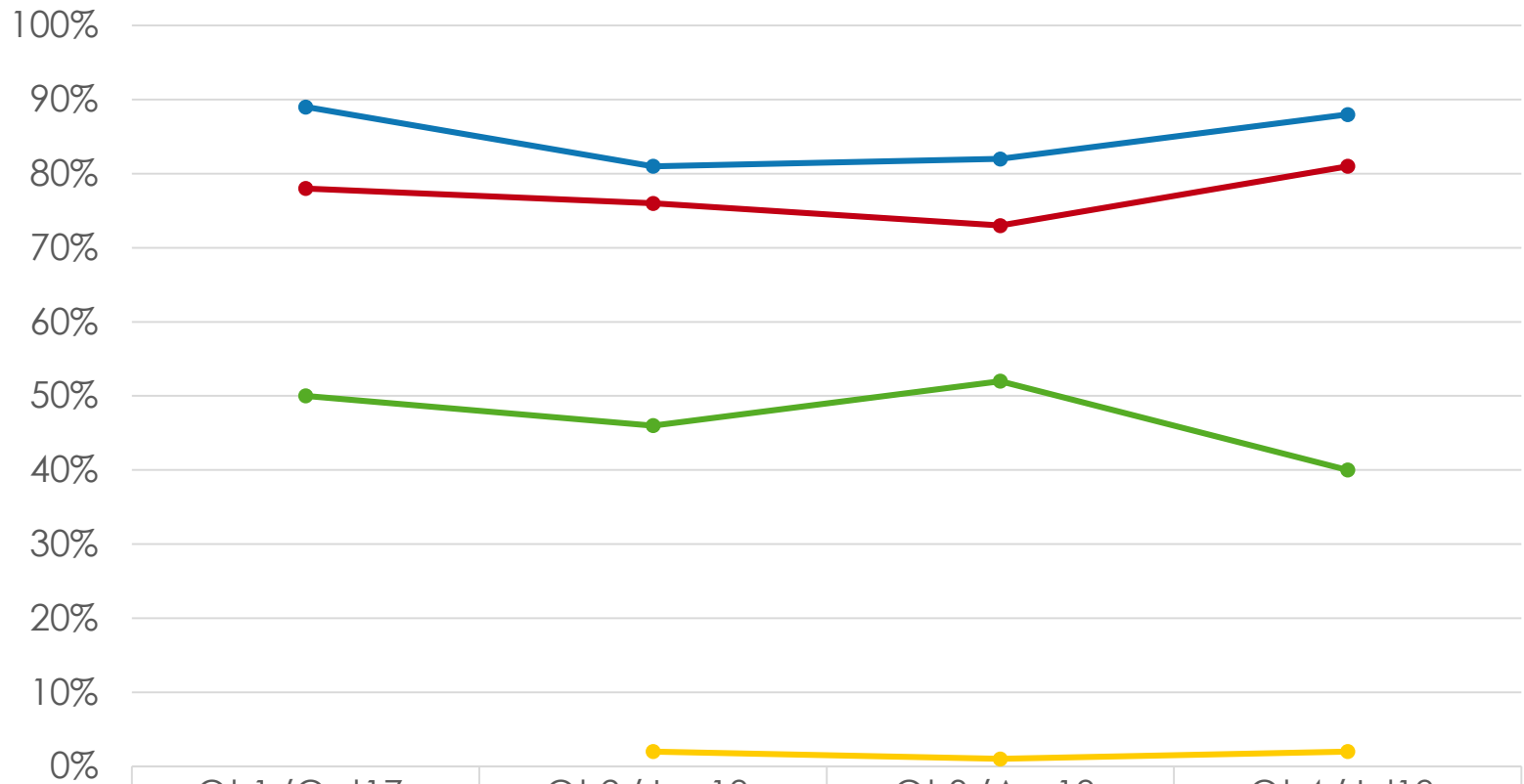
	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
FITs	89%	81%	82%	88%
Leisure Trvl	78%	76%	73%	81%
Family	50%	46%	52%	40%
MICE		2%	1%	2%

[A]

SECTION 1
PROFILE OF RESPONDENTS

[A]
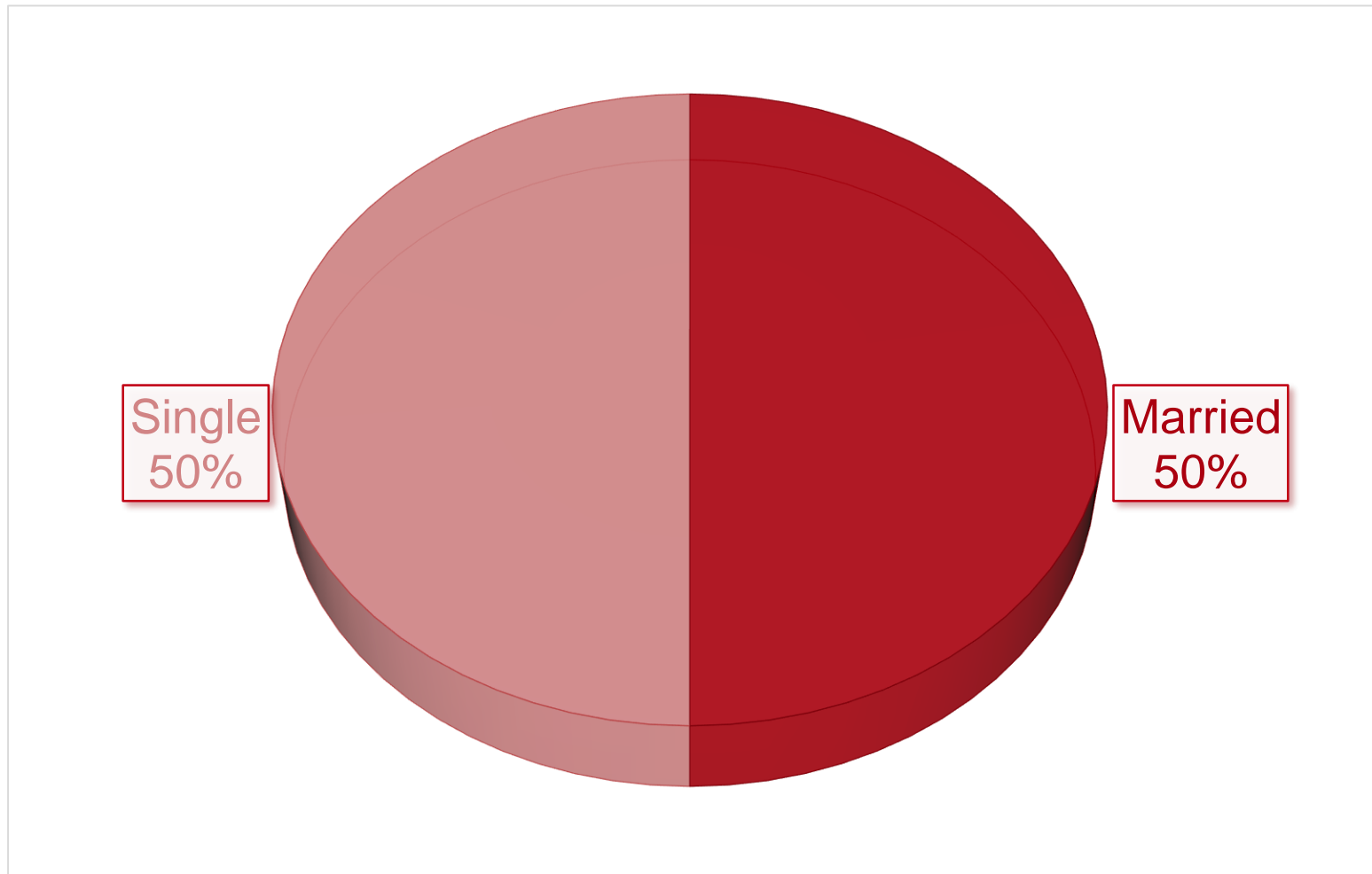
Marital Status

Marital status – FY2018 Tracking

Chart showing marital status tracking across quarters:

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)	YTD
Married	54%	46%	48%	50%	50%
Single	46%	54%	52%	50%	50%

Legend: — Married — Single

[A]
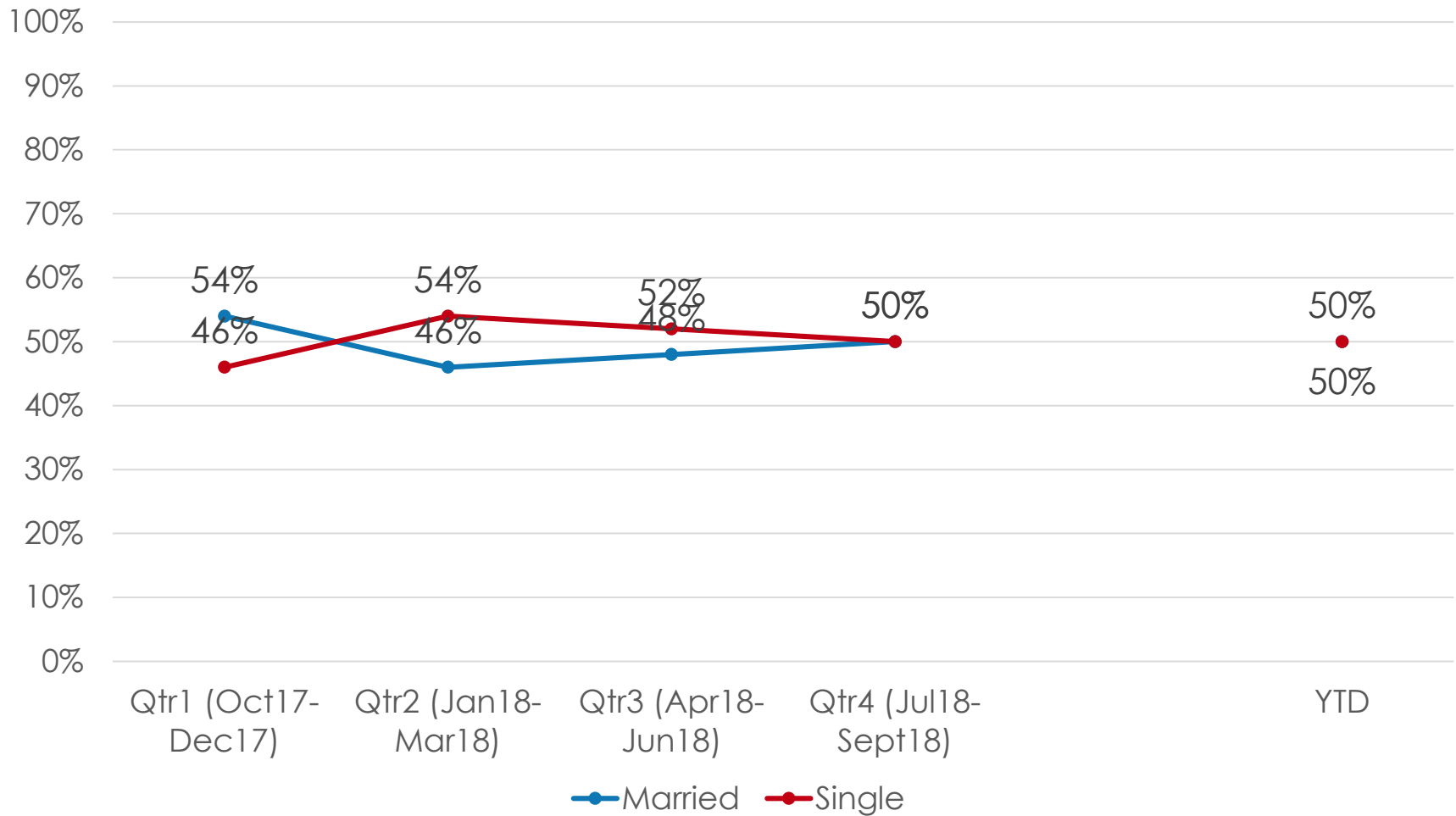
Marital status – Key Segments

GVB EXIT SURVEY
QE MARITAL STATUS

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
QE	Married	50%	100%	53%	48%	75%
	Single	50%		47%	52%	25%
	Total	110	2	89	97	44

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[A]

Age

[A]

Age – FY2018 Tracking

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
MEAN	39.92	38.22	39.75	36.41		38.55
MEDIAN	39	35	38	34		36

[A]
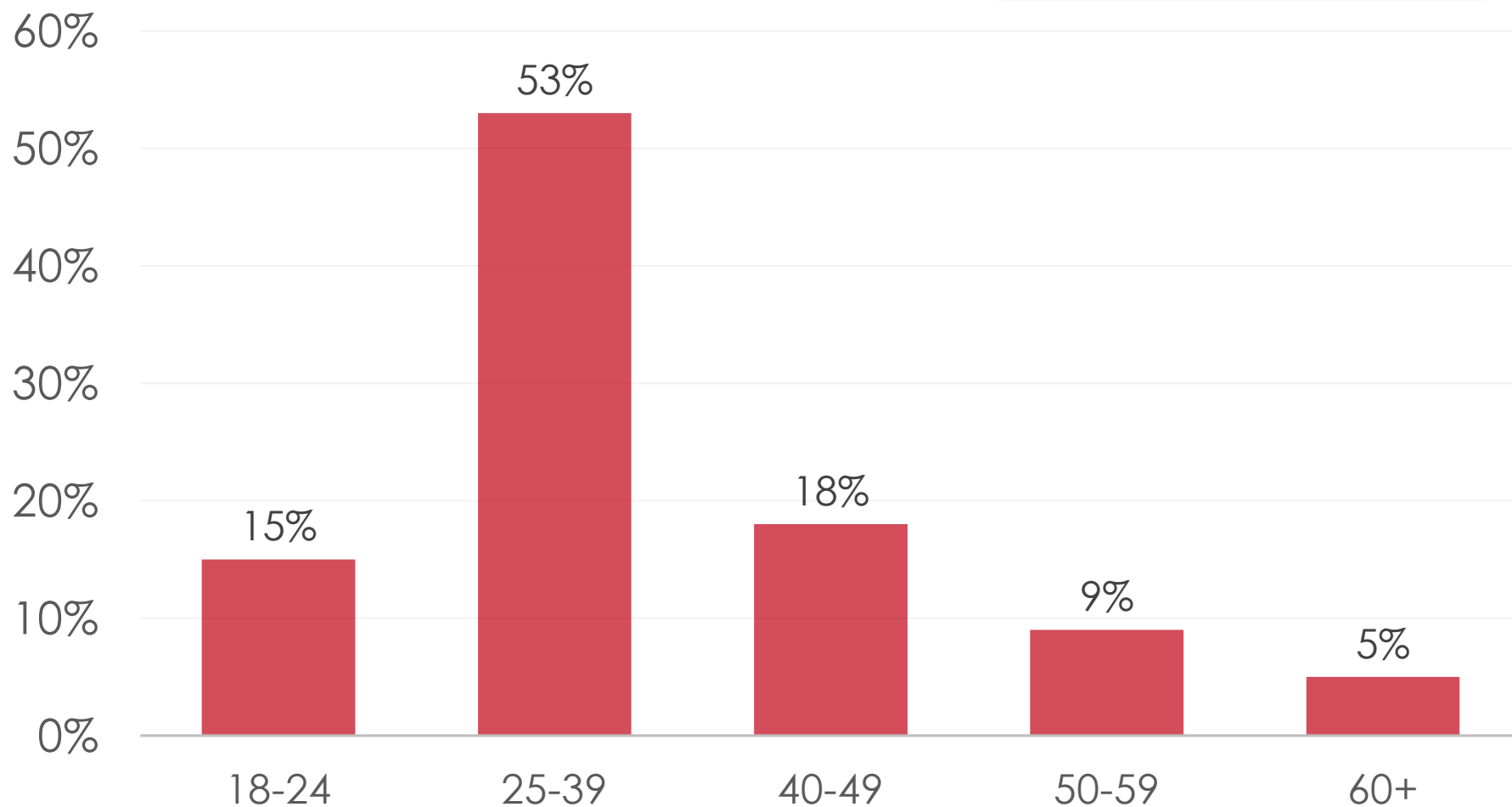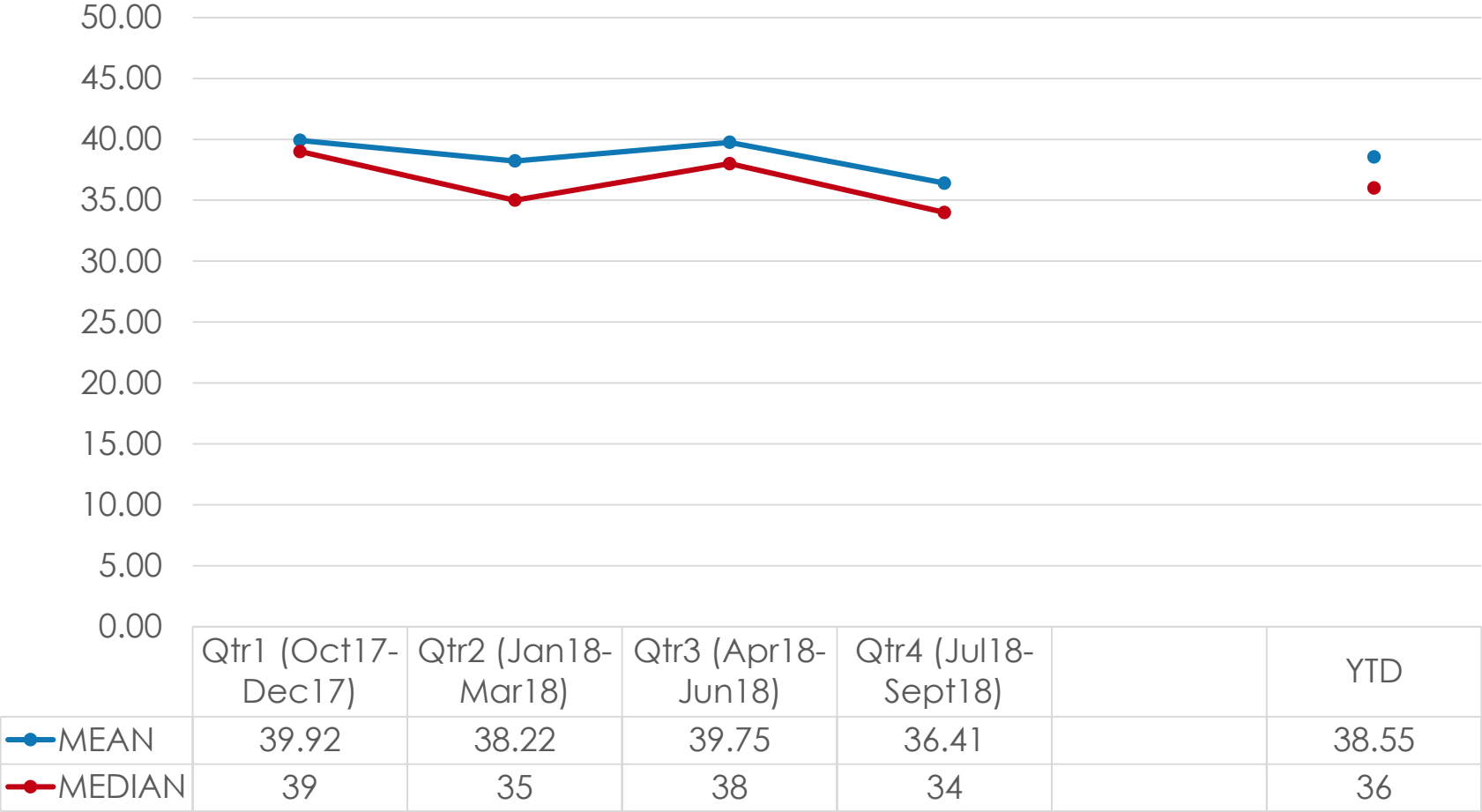
Age – Key Segments

GVB EXIT SURVEY
AGE

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
SD	18-24	15%		13%	13%	9%
	25-39	53%	50%	55%	55%	52%
	40-49	18%	50%	20%	18%	23%
	50-59	9%		9%	9%	14%
	60+	5%		2%	5%	2%
	Total	110	2	89	97	44
SD	Mean	36.41	38.00	36.04	36.26	37.75
	Median	34	38	34	34	36

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[A]

Annual Household Income
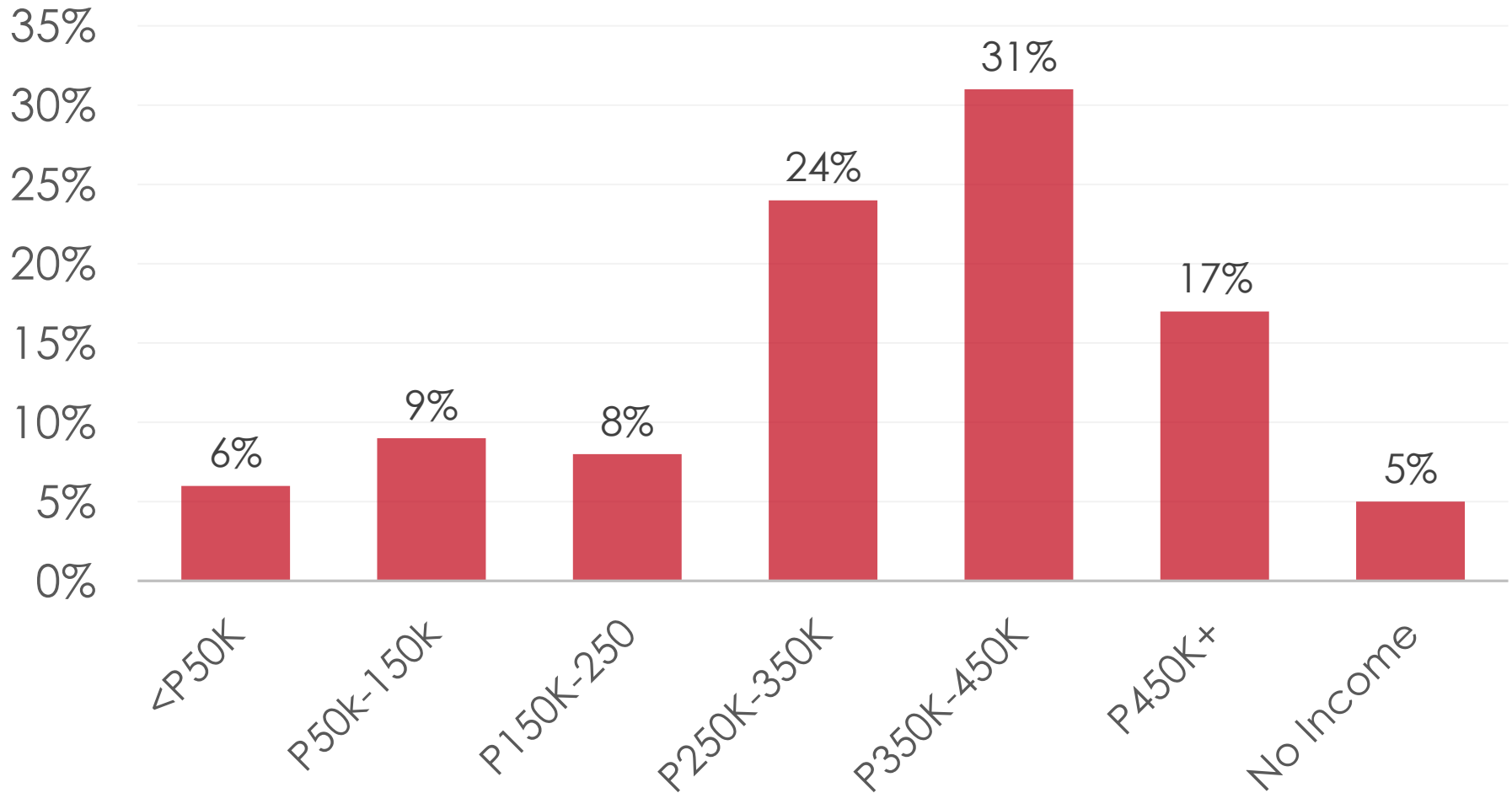
Annual Household Income – Key Segments
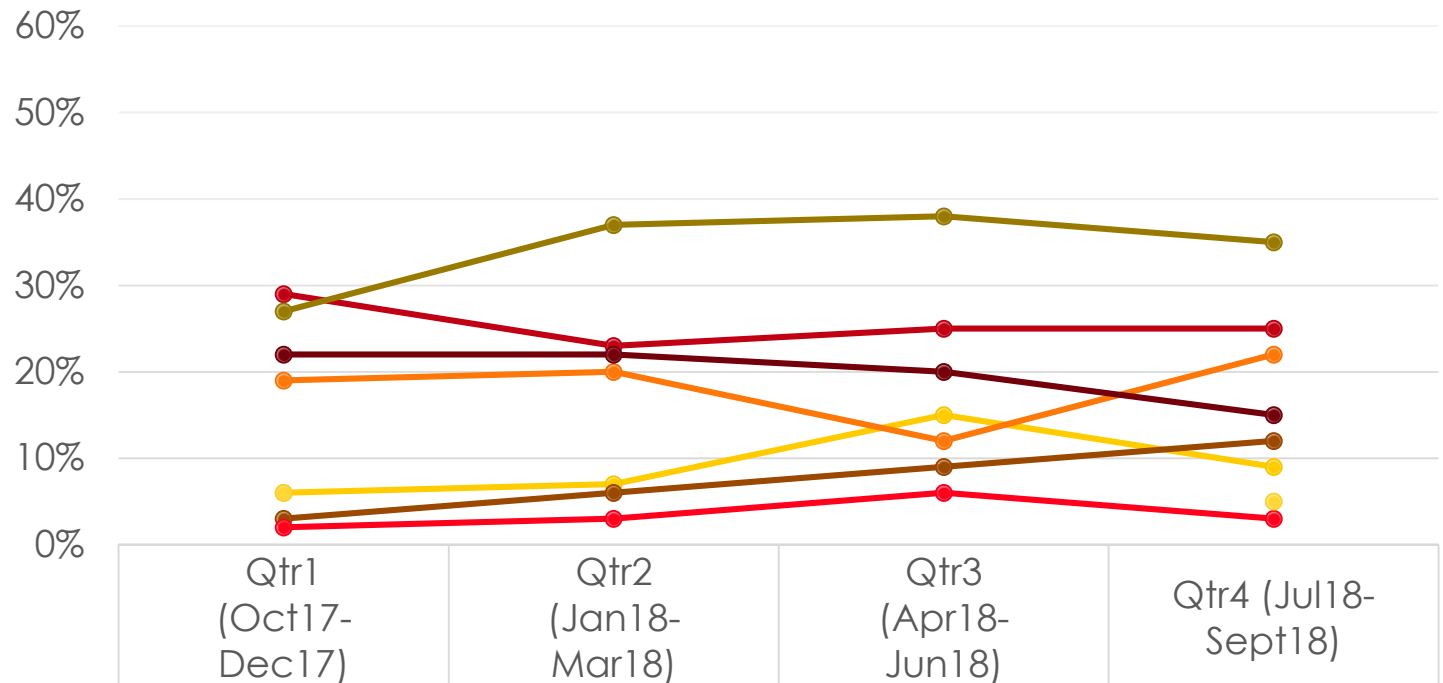
GVB EXIT SURVEY
Q26 Household income:

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q26	Up to P50K	6%		6%	6%	5%
	P50K-P150K	9%		9%	11%	7%
	P150K-P250K	8%		7%	7%	7%
	P250K-P350K	24%	100%	21%	23%	19%
	P350K-P450K	31%		35%	30%	44%
	P450K+	17%		19%	18%	16%
	No Income	5%		3%	4%	2%
	Total	106	2	86	94	43

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[A]

Travel Party

Travel Party
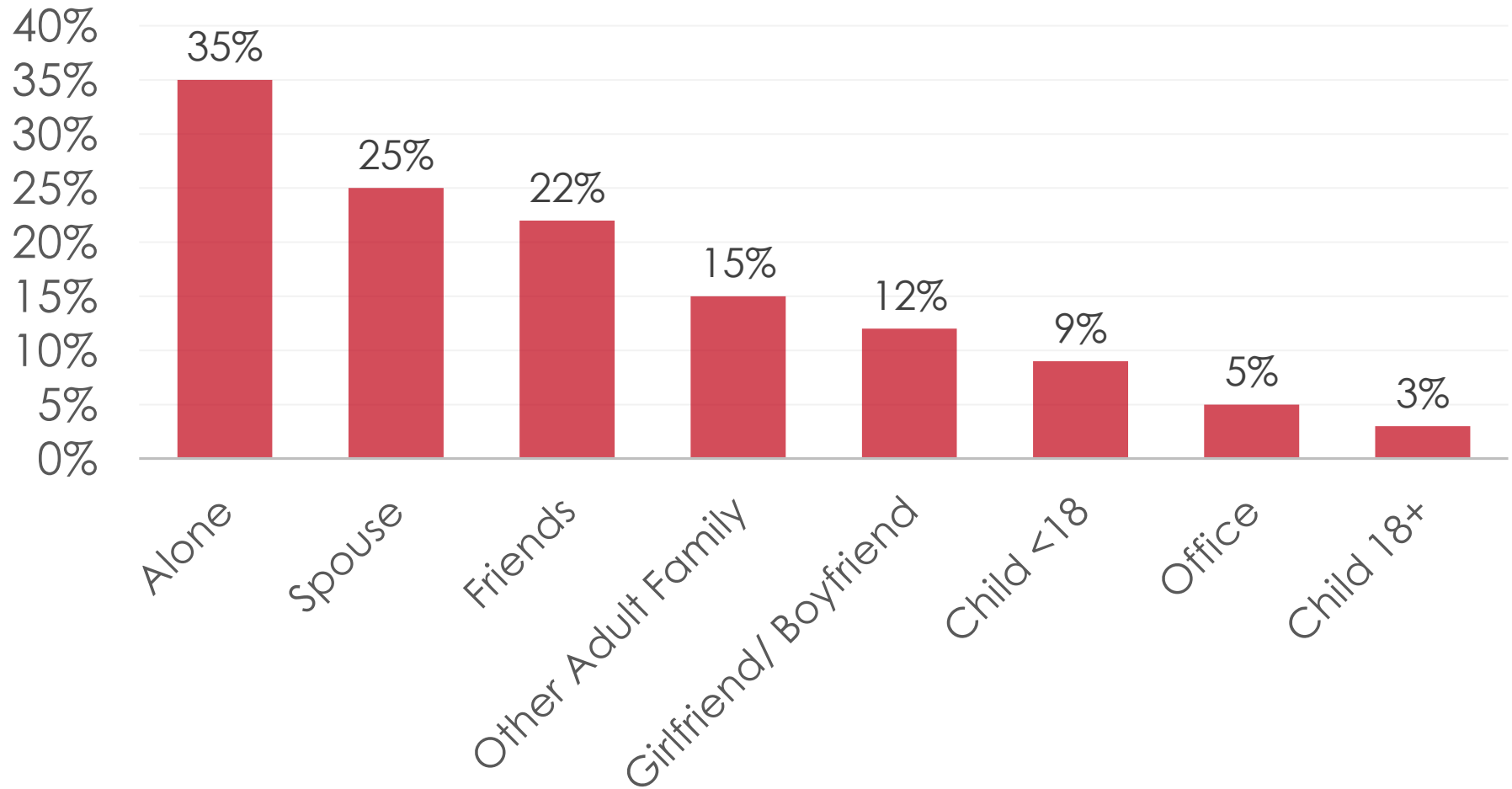
	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Spouse	29%	23%	25%	25%
Child <18	6%	7%	15%	9%
Friend/ Assoc	19%	20%	12%	22%
Other Adult Family	22%	22%	20%	15%
Alone	27%	37%	38%	35%
Girlfriend/ Boyfriend	3%	6%	9%	12%
Child- Adult	2%	3%	6%	3%

[A]

Travel Party - Children

9% TRAVELING WITH A CHILD

20%	
18%	
16%	
14%	
12%	
10%	
8%	
6%	5%
4%	3% 4% 3%
2%	
0%	0-2 Years old 3-6 Years old 7-11 Years old 12-18 Years old

[A]

Trips to Guam

Repeat
35%

First time
65%

[A]
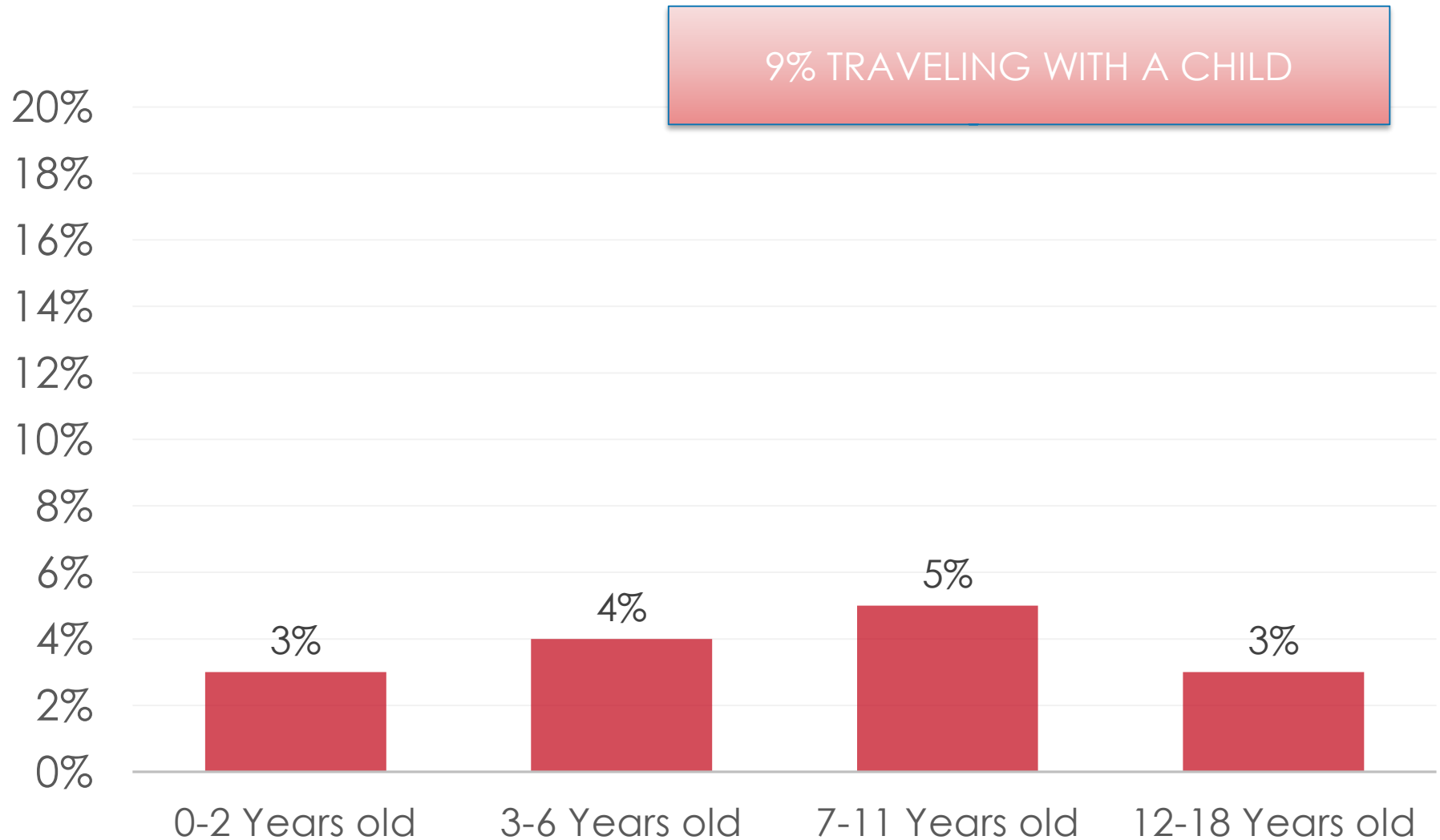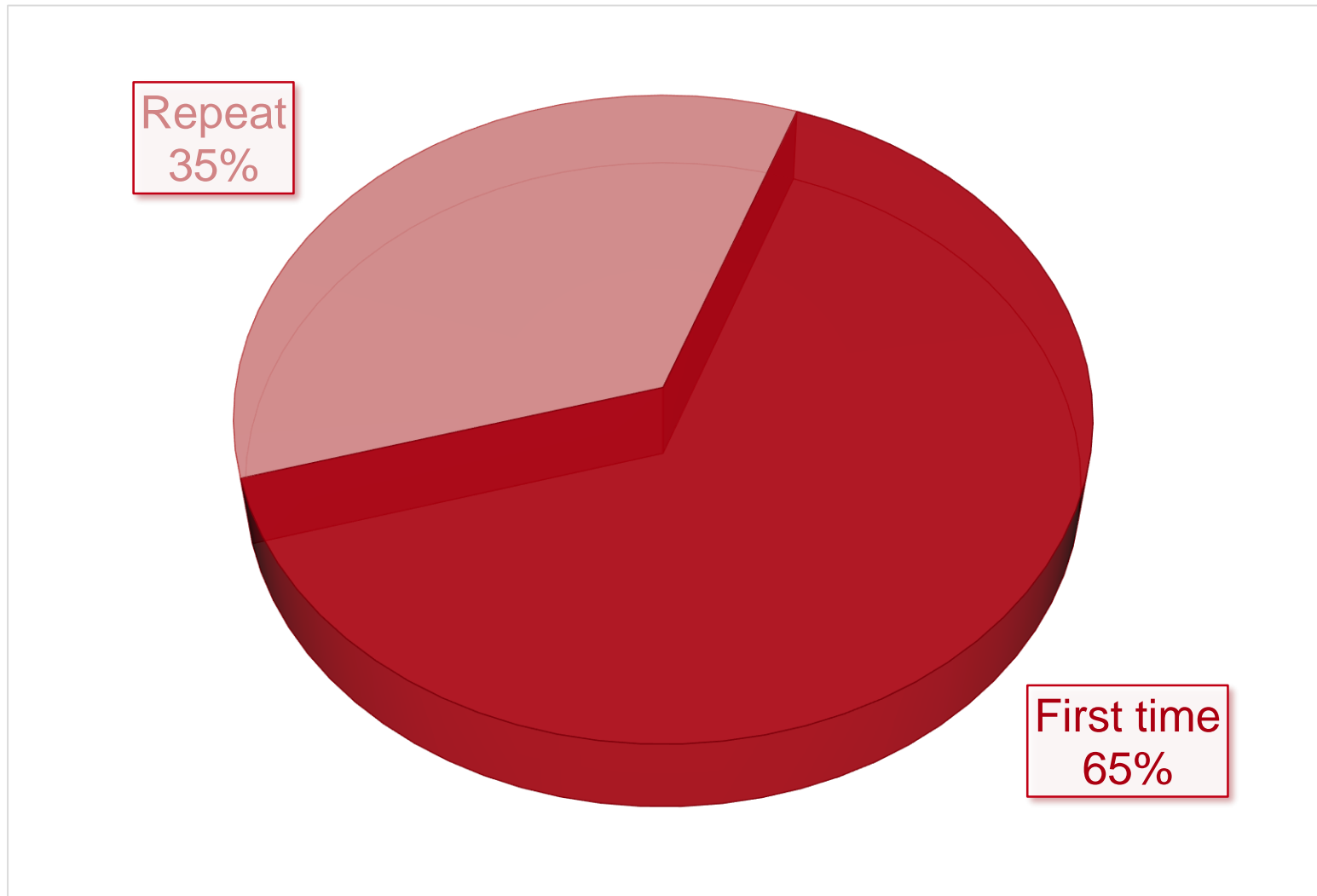
Trips to Guam – FY2018 Tracking

Line chart showing First and Repeat trip percentages by quarter:

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)	YTD
First	68%	64%	57%	65%	64%
Repeat	32%	36%	43%	35%	36%

[A]
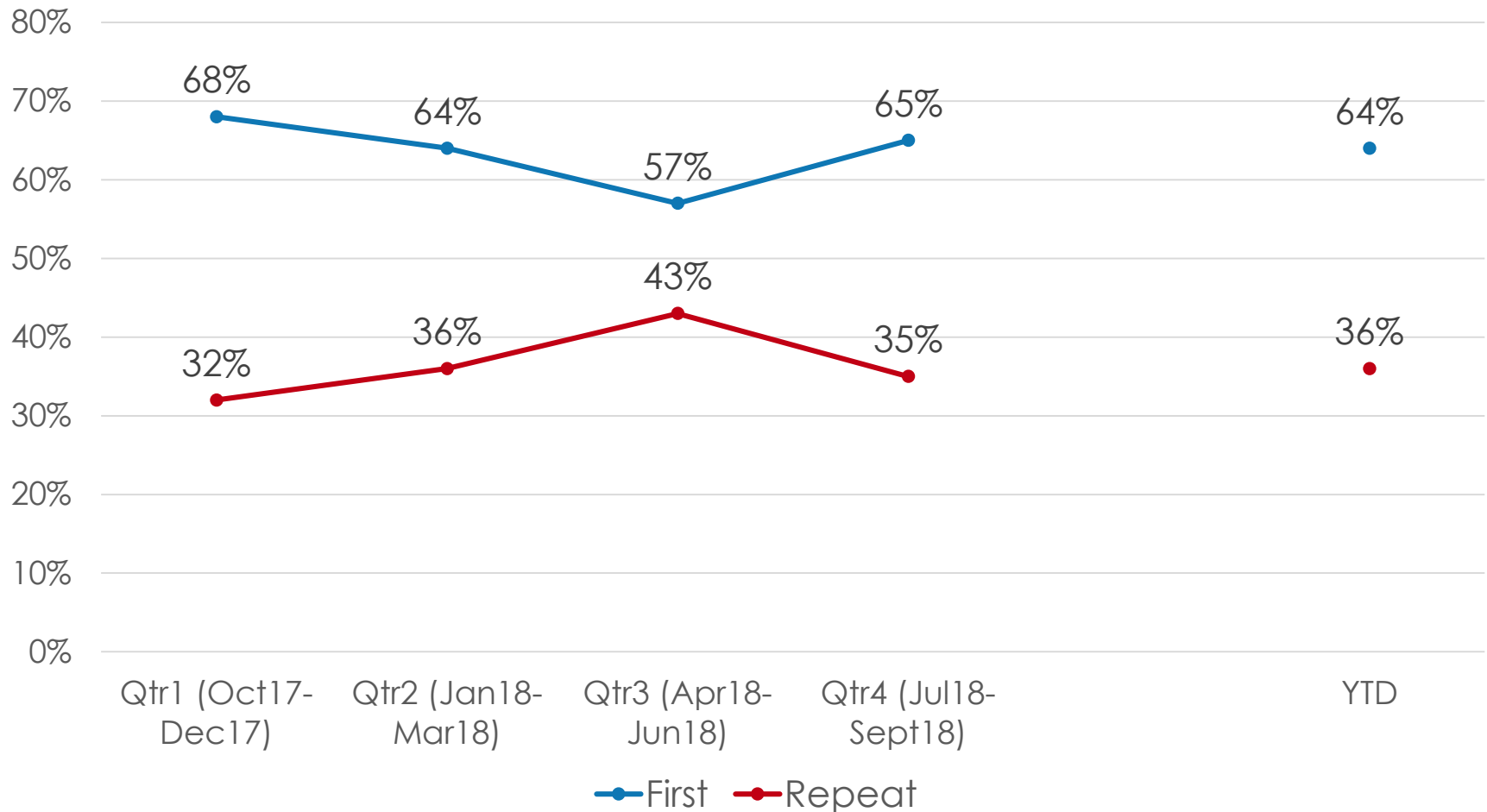
Trips to Guam – Key Segments

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

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q3	1st Time	65%	100%	73%	67%	70%
	Repeat	35%		27%	33%	30%
	Total	110	2	89	97	44
Q3A	Mean	2.04	1.00	1.80	1.79	1.84
	Median	1	1	1	1	1

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[A]

Length of Stay

[A]
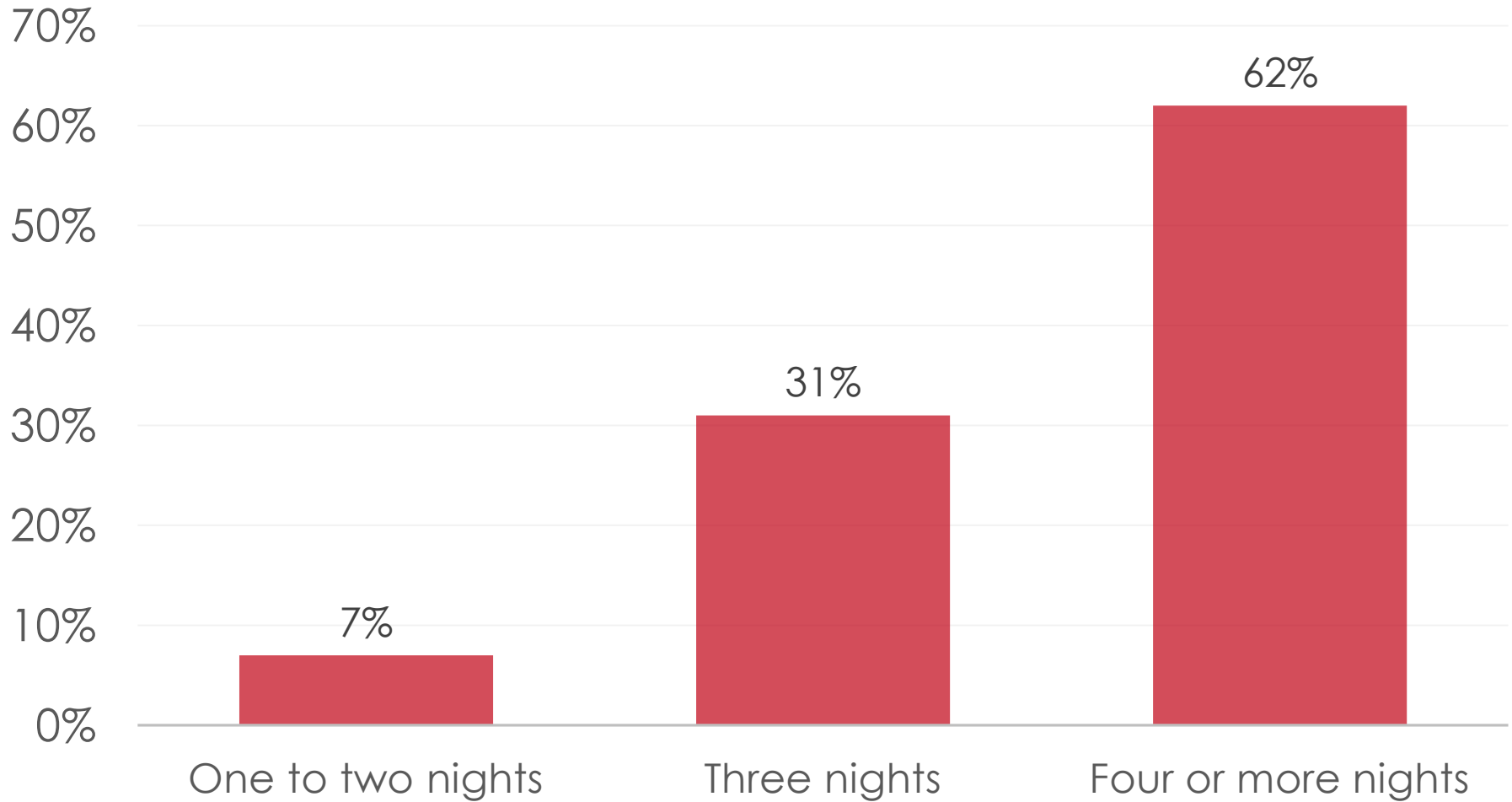
Length of Stay – FY2018 Tracking

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
MEAN	5.85	4.96	6.26	6.42		5.87
MEDIAN	5	3	3	4		4

[A]
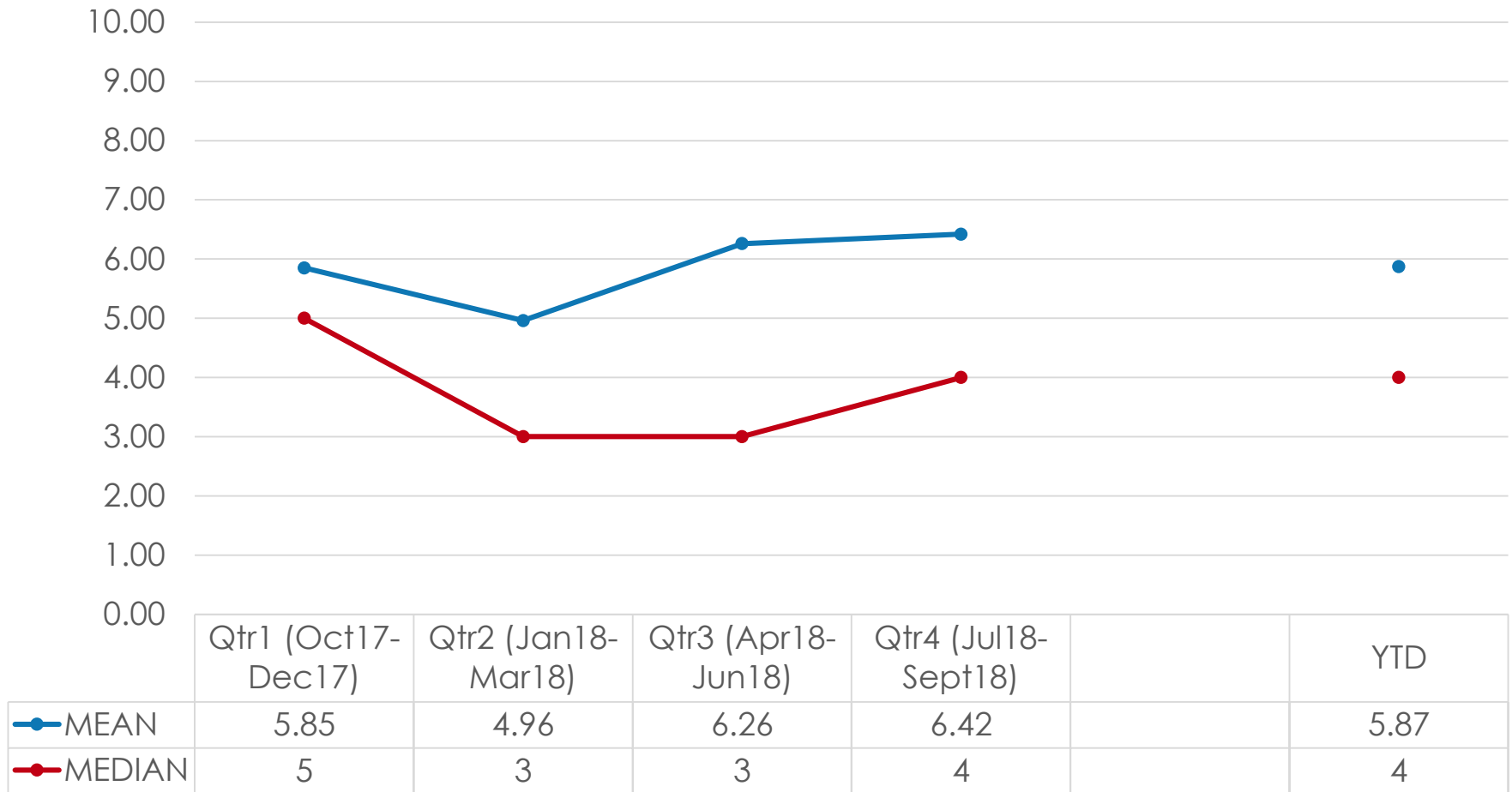
Length of Stay – Key Segments

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

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
SA	1-2	7%		9%	6%	9%
	3	31%		33%	32%	27%
	4+	62%	100%	58%	62%	64%
	Total	110	2	89	97	44
SA	Mean	6.42	5.50	5.98	6.14	5.86
	Median	4	6	4	4	4

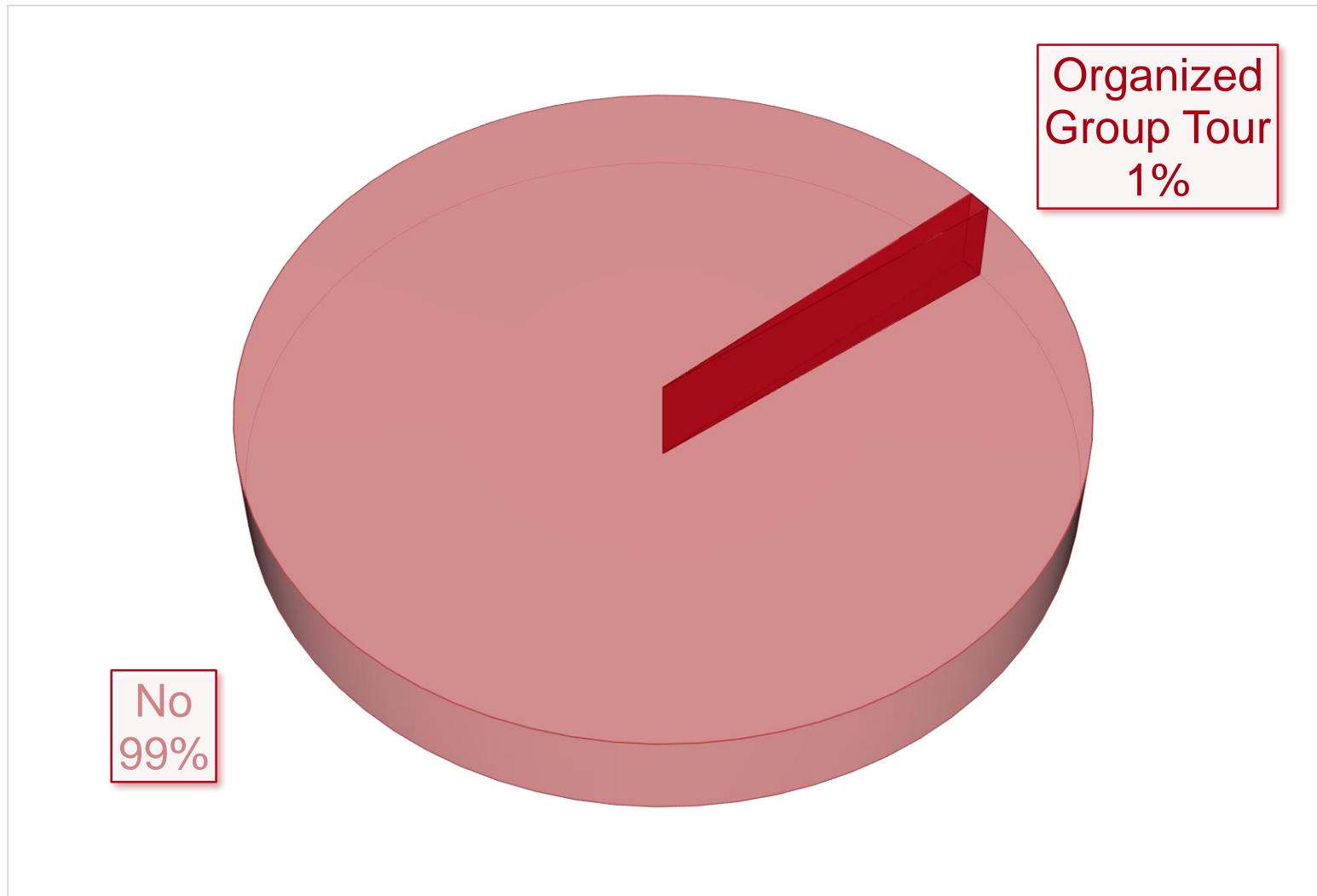Prepared by Anthology Research

[A]

Occupation – Top Responses (10%+)

[A]
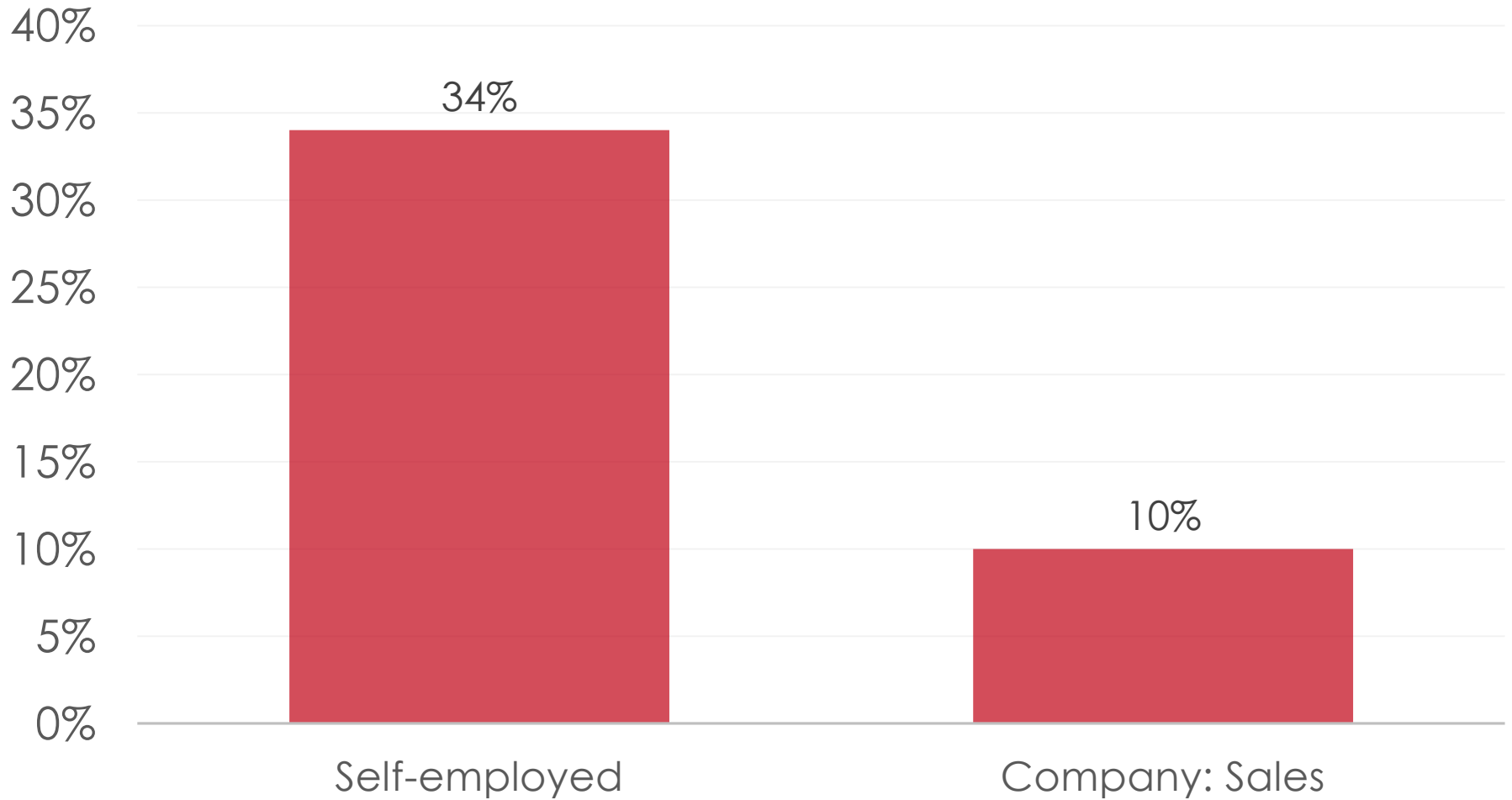
SECTION 2
TRAVEL PLANNING

[A]

Organized Group Tour

Organized
Group Tour
1%

No
99%

[A]

Organized Group Tour

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
Organized Group Tour	4%	1%	0%	1%		1%
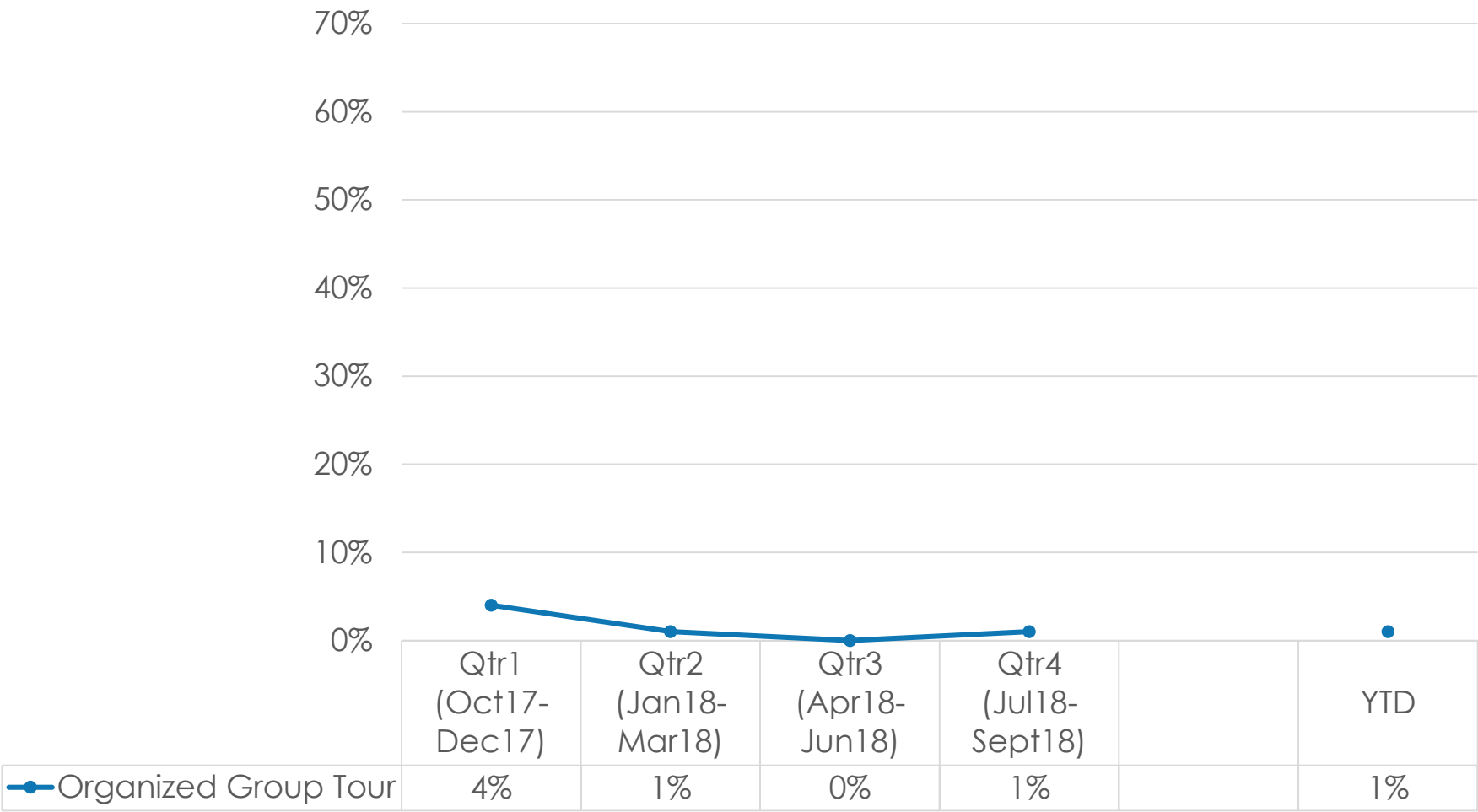
Travel Arrangements Sources
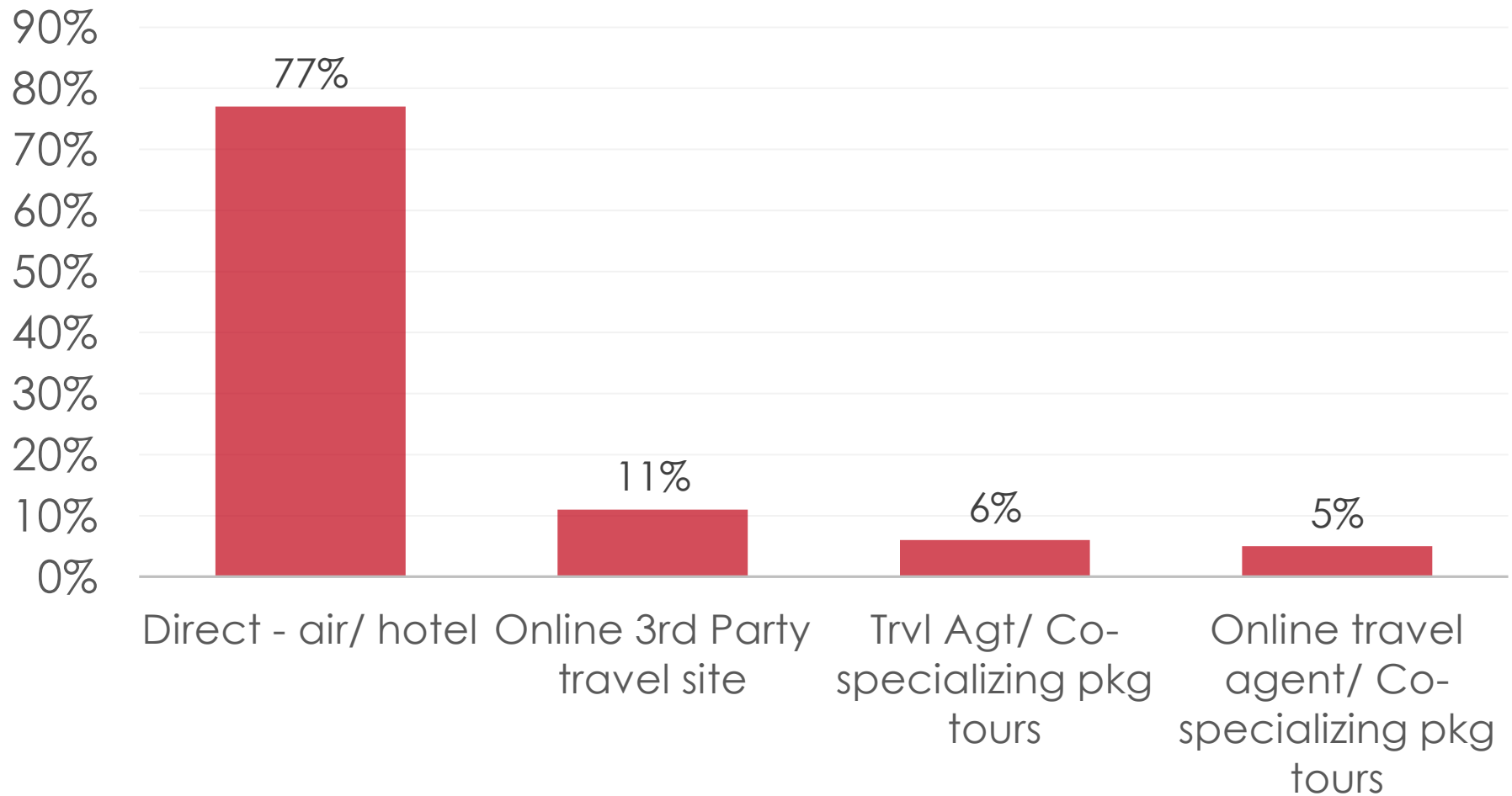
Travel Arrangements Sources
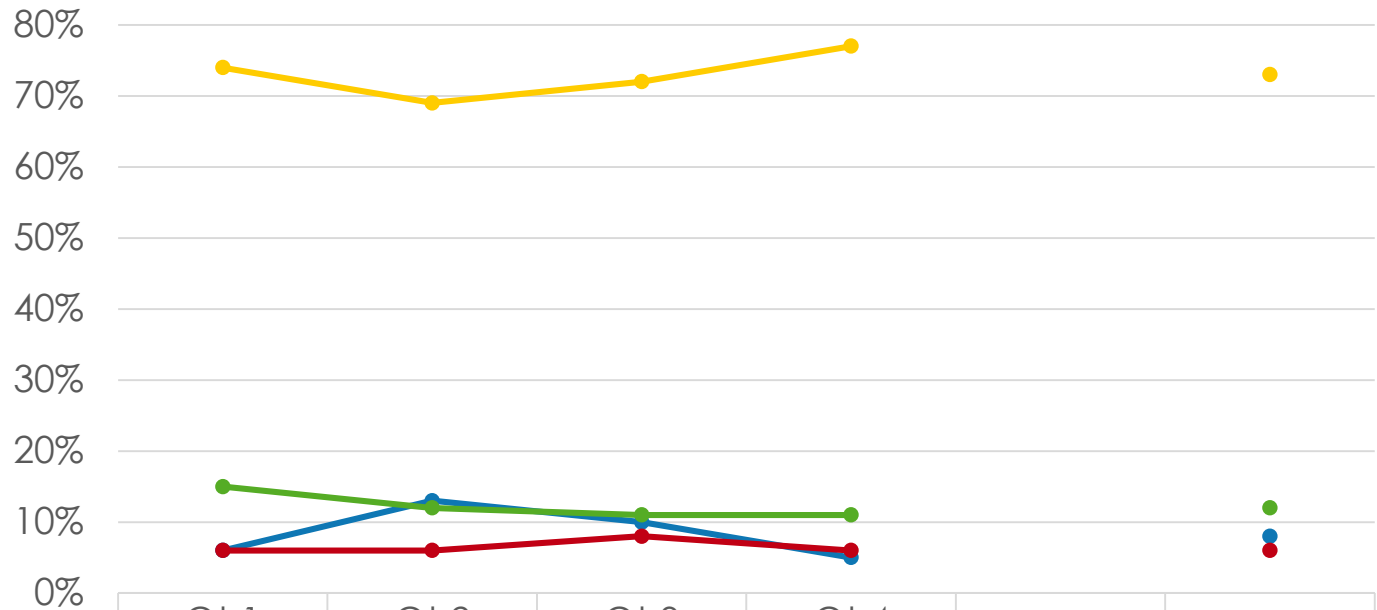
	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
Online travel agent	6%	13%	10%	5%		8%
Trvl Agt/ Co- Pkg Tour	6%	6%	8%	6%		6%
Online 3rd Party	15%	12%	11%	11%		12%
Direct Air/ Hotel	74%	69%	72%	77%		73%

[A]

Prepaid Package Trip

Prepaid Pkg
26%

No
74%

[A]

Prepaid Package Trip

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
Prepaid Pkg Trip	27%	18%	25%	26%		24%

[A]
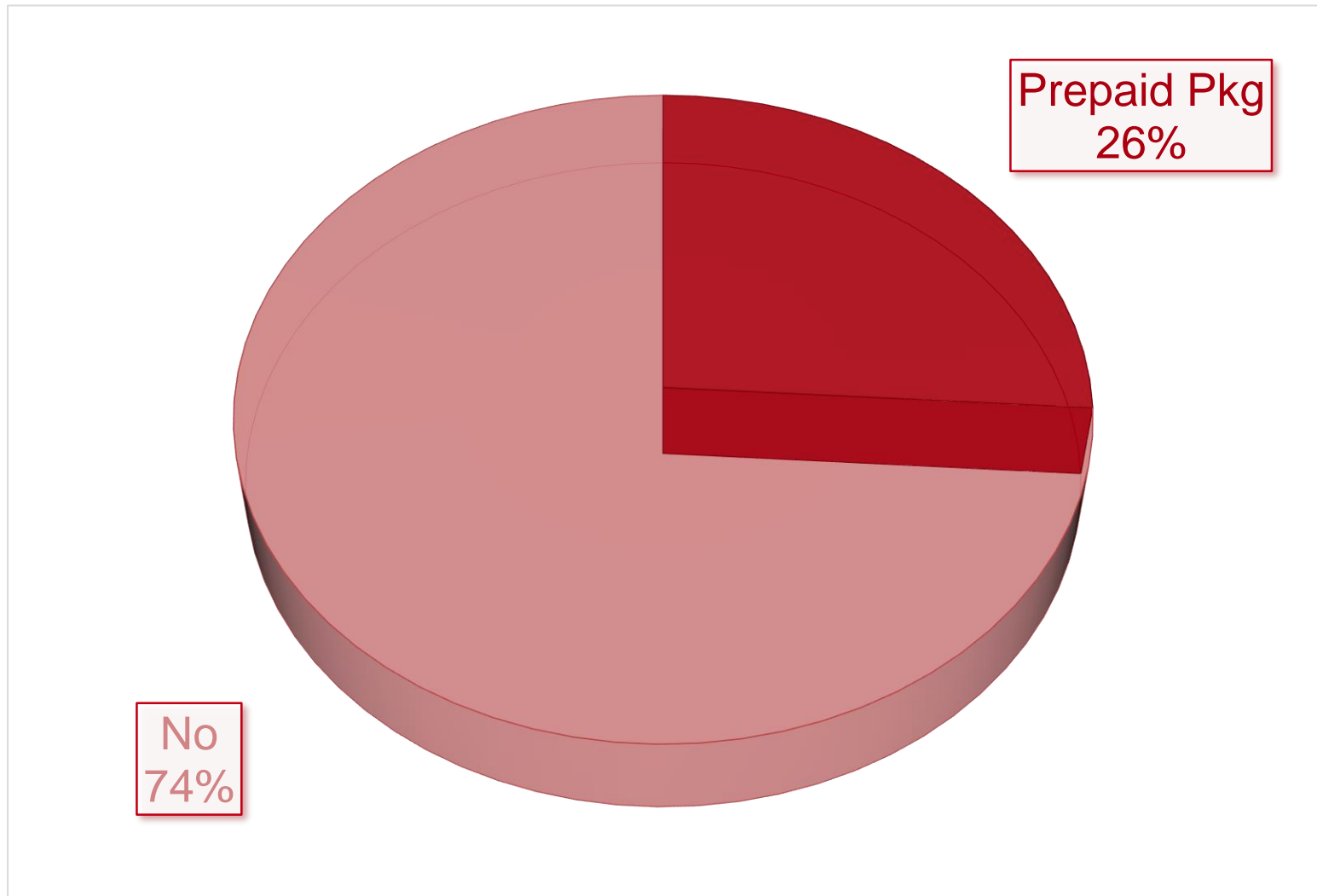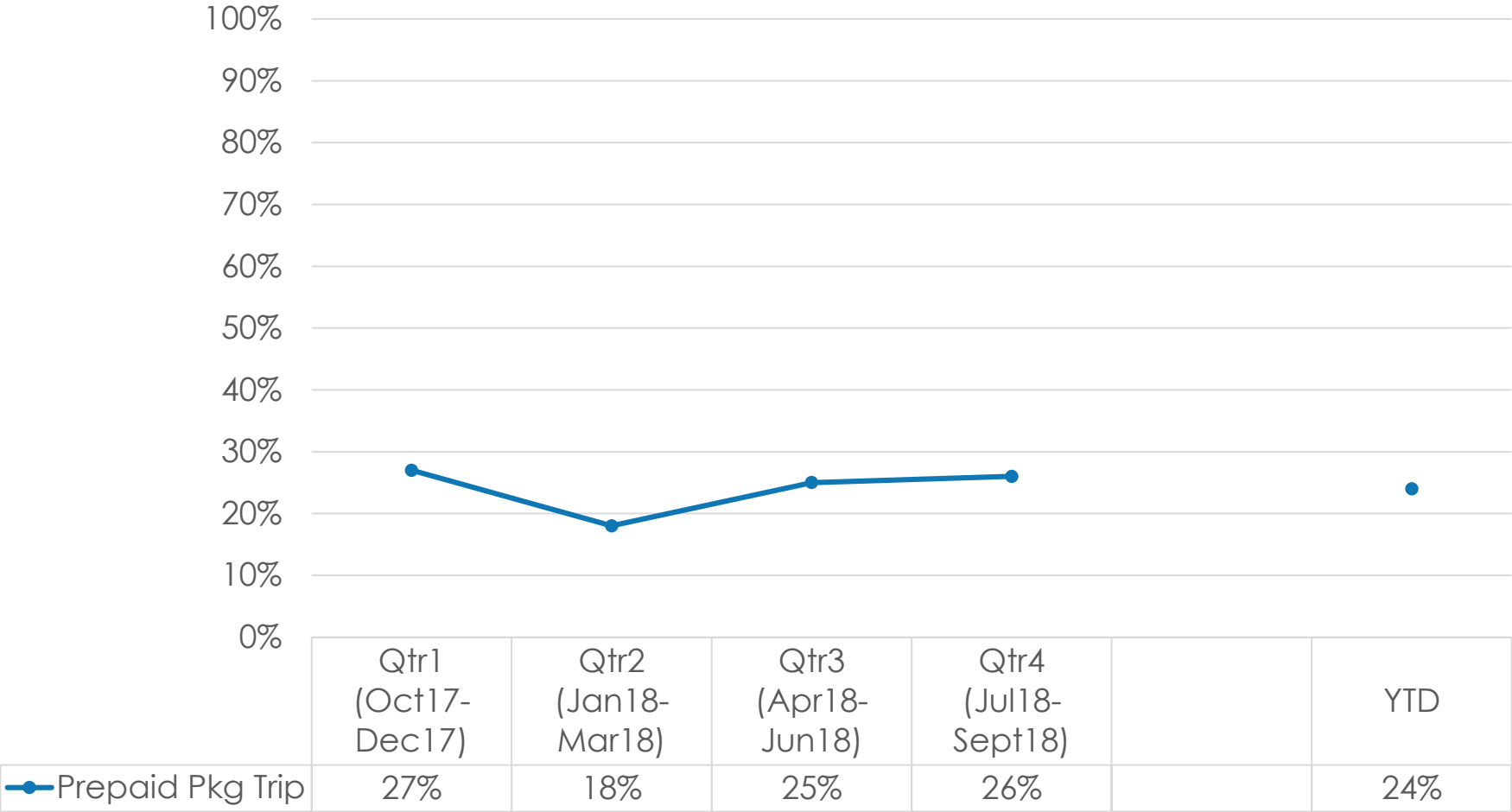
Accommodations (Top Responses/ 5%+)

Stayed At | Length of Stay

- Home stay/ friend/ relative: 22% / 10.54
- Holiday Resort: 14% / 4.00
- Guest House/ Rental: 11% / 5.75
- Apartment: 9% / 7.00
- Hilton Guam: 8% / 3.22

[A]
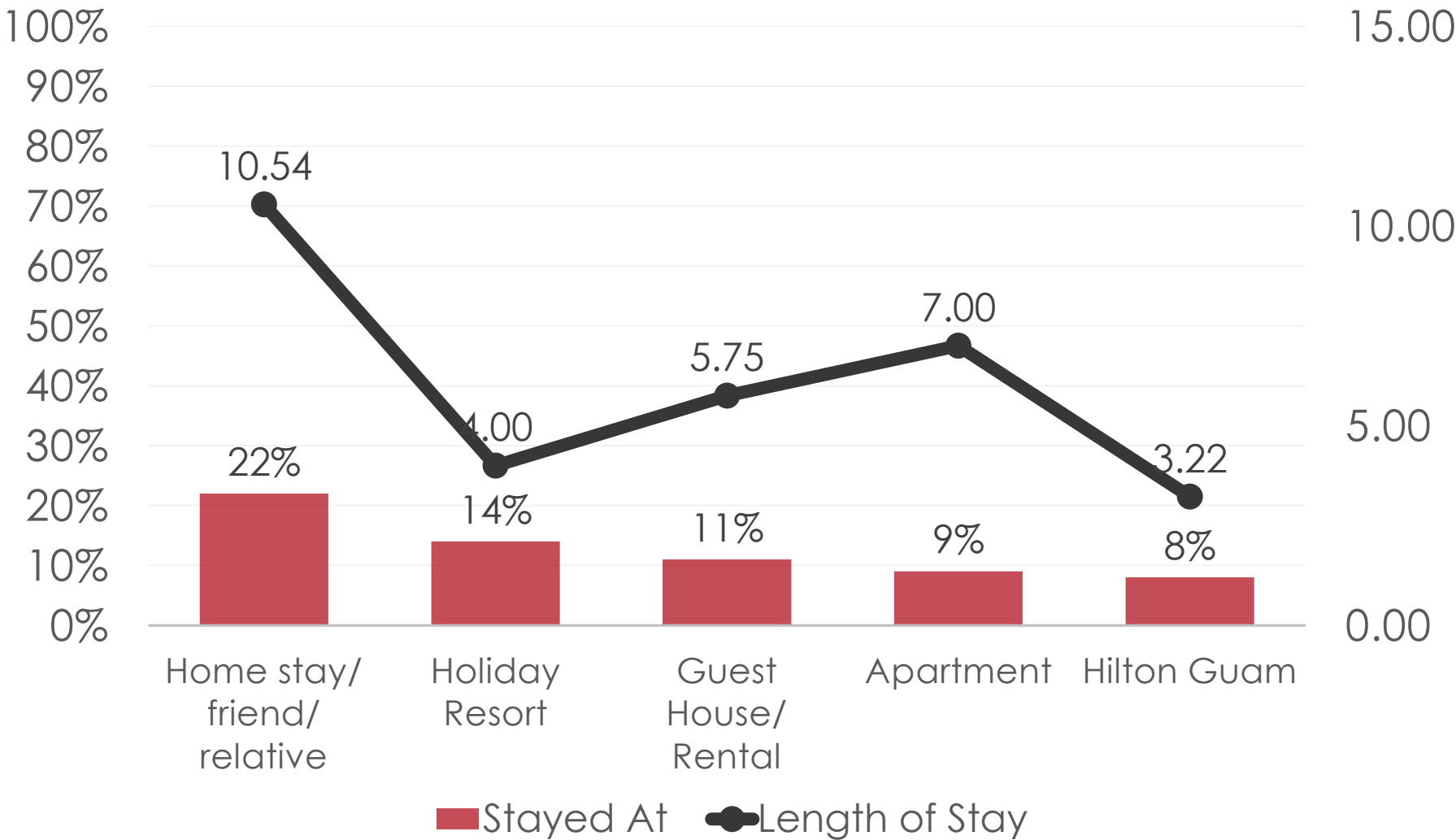
Travel Motivation (Top Responses)

Motivation	Percentage
Shopping	49%
Relax	47%
Pleasure	28%
Visit- fr/rel	26%
Beauty	25%
Recommend	23%
Travel time	12%
Prior trip	11%
Safe	7%
Price	6%

[A]
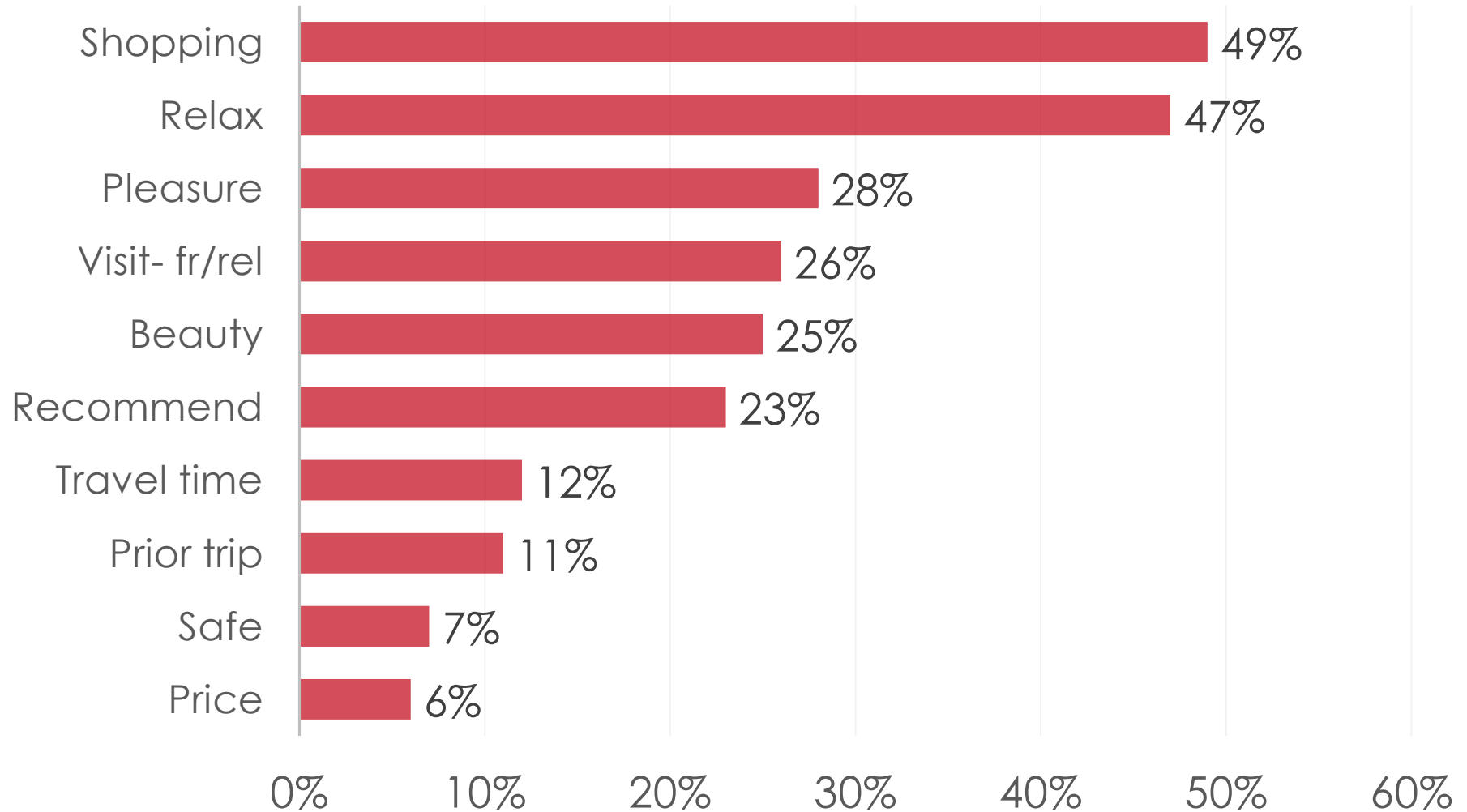
Travel Motivation – Key Segments

GVB EXIT SURVEY
Q5A Please select the top three reasons that motivated you to travel to Guam?

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q5A	Shopping	49%		53%	51%	53%
	Just to relax	47%	50%	57%	49%	51%
	Pleasure/ vacation	28%		34%	27%	42%
	To visit friends or relatives	26%	50%	24%	25%	16%
	Beautiful seas, beaches, tropical climate	25%		30%	22%	21%
	Recommendation of friend/ relative/ travel agency	23%	50%	19%	24%	21%
	Short travel time (not too far from home)	12%		10%	13%	7%
	A previous visit	11%		7%	8%	9%
	It is a safe place to spend a vacation	7%		8%	8%	7%
	Price of the tour package	6%		6%	5%	5%
	Adventure	5%	50%	4%	5%	5%
	Scuba diving	4%		3%	4%	5%
	Company/ business trip	4%		2%	2%	
	Career certification/ testing	4%		3%	3%	2%
	Water sports (snorkeling, windsurfing, parasailing)	2%		1%	2%	2%
	Government or military	2%		1%	1%	
	My company sponsored me	1%			1%	
	Convention/ conference/ trade show/ meeting	1%	50%		1%	
	Honeymoon	1%		1%	1%	2%
	Incentive trip	1%	50%	1%	1%	2%
	School trip	1%		1%	1%	
	Shop Guam e-Festival	1%		1%		2%
	Total	109	2	89	96	43

Prepared by Anthology Research

[A]

SECTION 3 EXPENDITURES

[A]

Prepaid Expenditures

- $954.05 = overall mean average prepaid expense (for entire travel party size) by respondent

- $603.32 = overall mean average <u>per person</u> prepaid expenditures

[A]

Prepaid Entire Travel Party – FY2018 Tracking
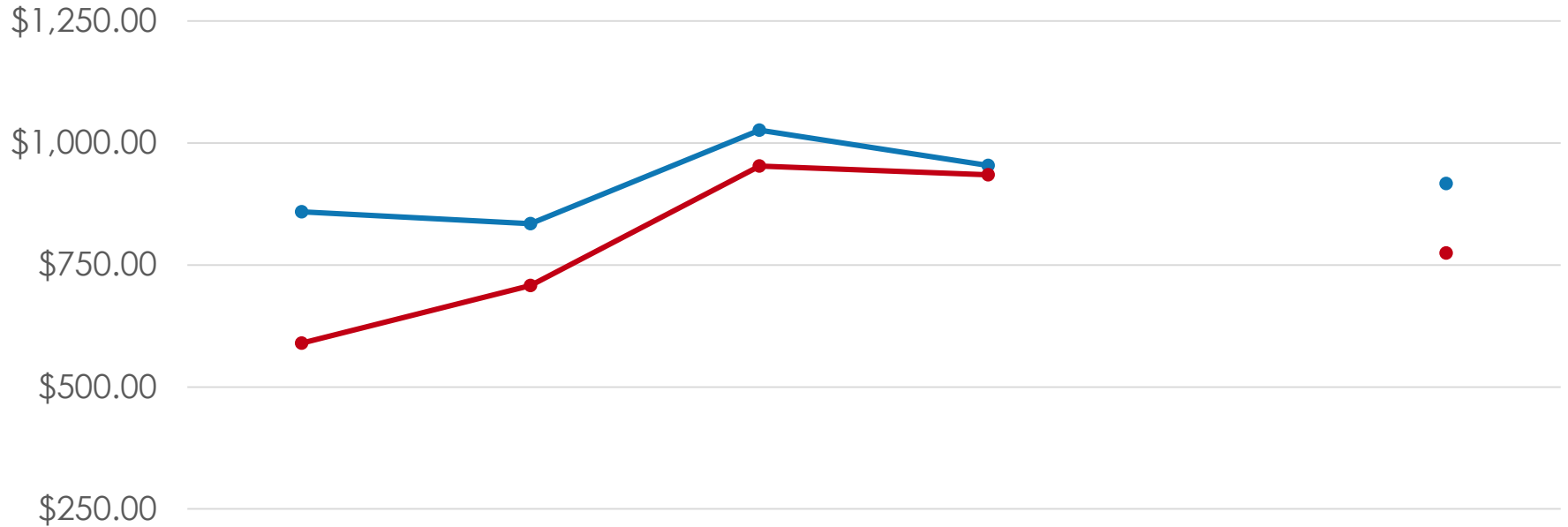
	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
MEAN	$859.07	$834.76	$1,026.65	$954.05		$917.34
MEDIAN	$590.00	$708.00	$953.00	$935.00		$775.00

[A]

Prepaid Per Person– FY2018 Tracking
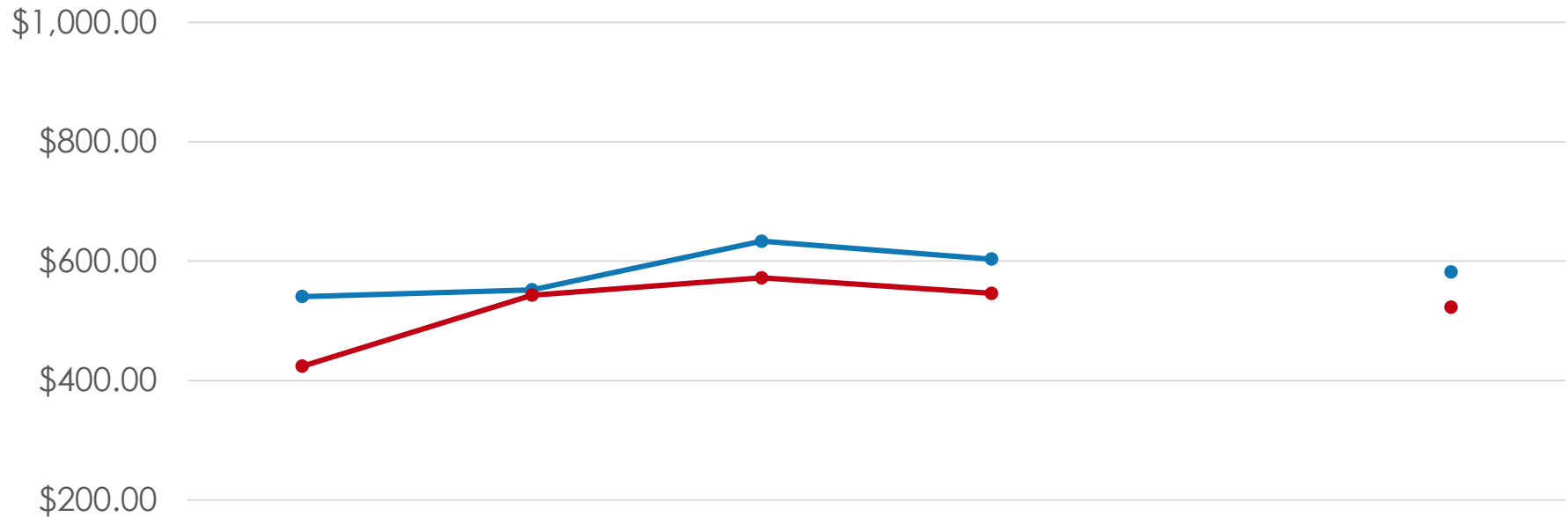
	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
MEAN	$540.67	$551.84	$633.35	$603.32		$581.65
MEDIAN	$424.00	$543.00	$572.00	$546.00		$523.00

[A]

Prepaid Per Person– Key Segments

GVB EXIT SURVEY
Q10A PREPAID - PER PERSON:

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
PREPAID PP	Mean	$603.32	$1,395.96	$590.10	$618.99	$542.61
	Median	$546	$1,396	$514	$561	$477

Prepared by Anthology Research

[A]

Prepaid Expenses by Category – MEAN Entire Travel Party

Category	Mean
Air/ Hotel pkg	$849.21
Air/ Hotel/ Meal pkg	$795.85
Air Only	$296.26
Hotel Only	$446.99
Hotel/ Meal	$210.49
F&B Hotel	$127.44
Ground Trans-Home	$47.26
Ground Trans-Guam	$132.88
Optional Tour	$130.14
Other	$362.60

[A]

Prepaid– FY2018 Tracking
Airfare & Accommodation Packages

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$646.02	$655.12	$582.67	$849.21
MEDIAN	$325.00	$433.00	$486.00	$776.00

[A]
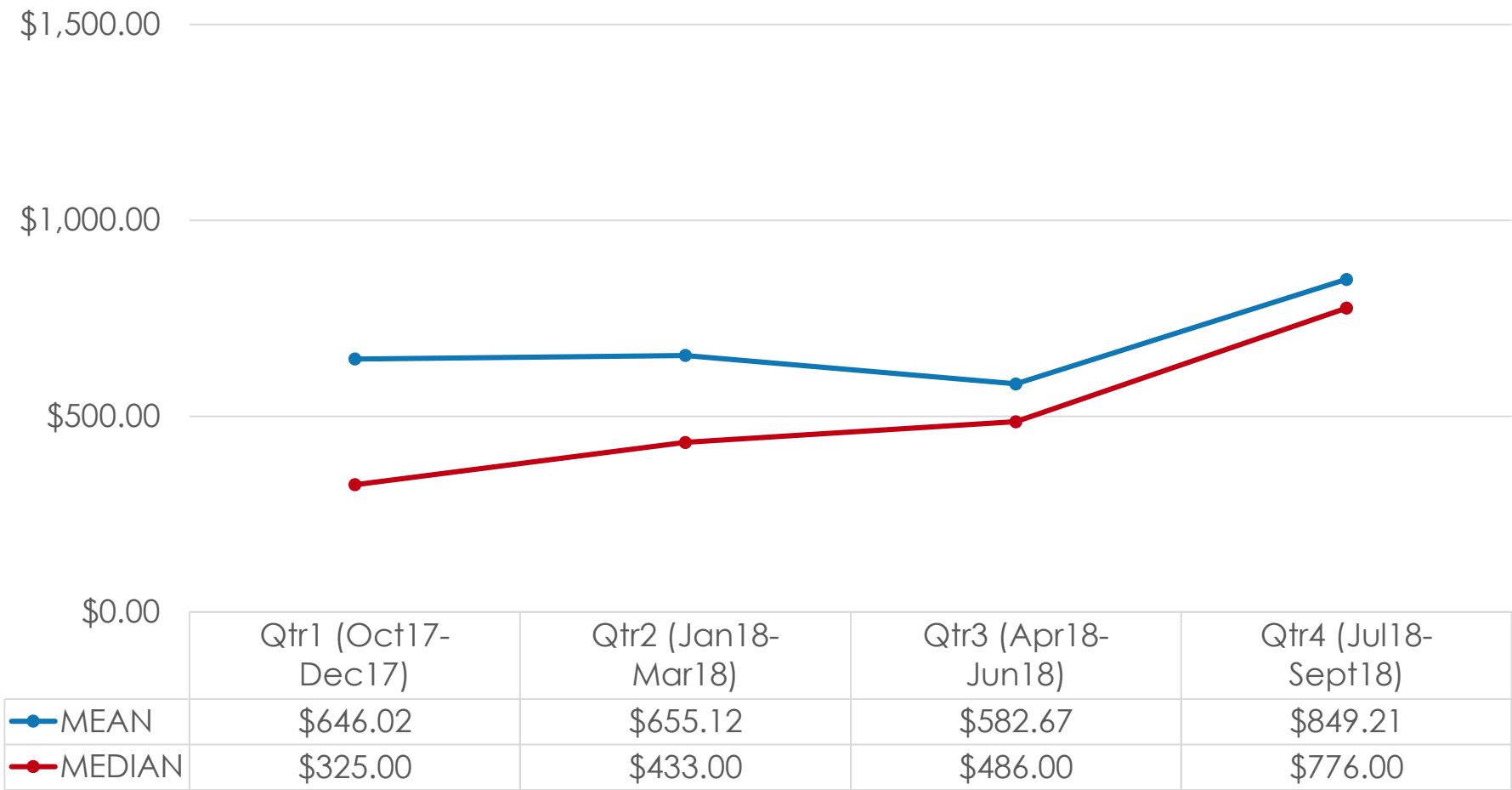
Prepaid– FY2018 Tracking
Airfare & Accommodation W/ Meal Packages
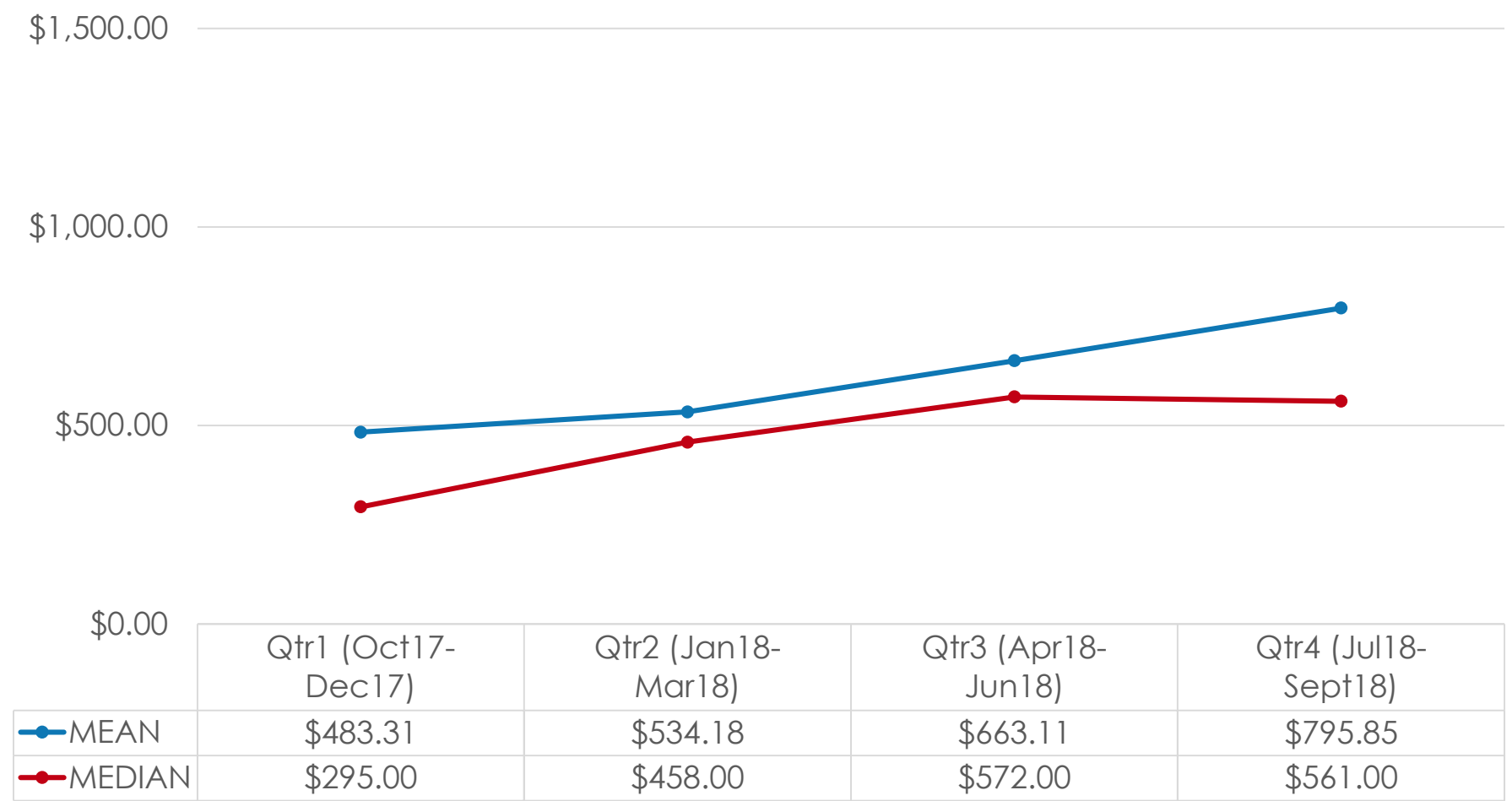
	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$483.31	$534.18	$663.11	$795.85
MEDIAN	$295.00	$458.00	$572.00	$561.00

[A]

Prepaid– FY2018 Tracking
Airfare Only

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$318.59	$355.47	$290.08	$296.26
MEDIAN	$236.00	$310.00	$248.00	$243.00

[A]

Prepaid– FY2018 Tracking
Accommodations Only

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$228.84	$235.01	$315.20	$446.99
MEDIAN	$177.00	$242.00	$181.00	$243.00

[A]
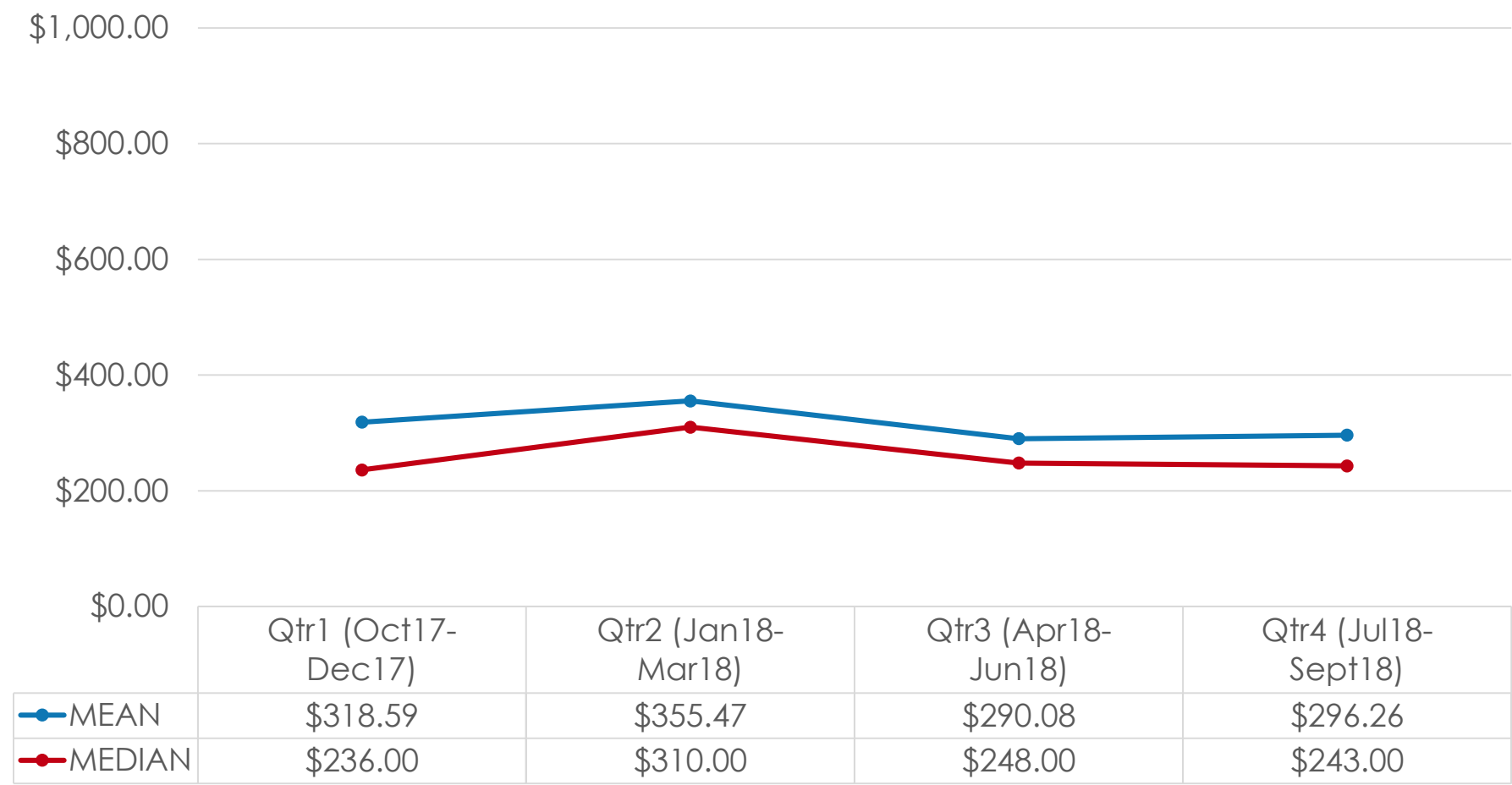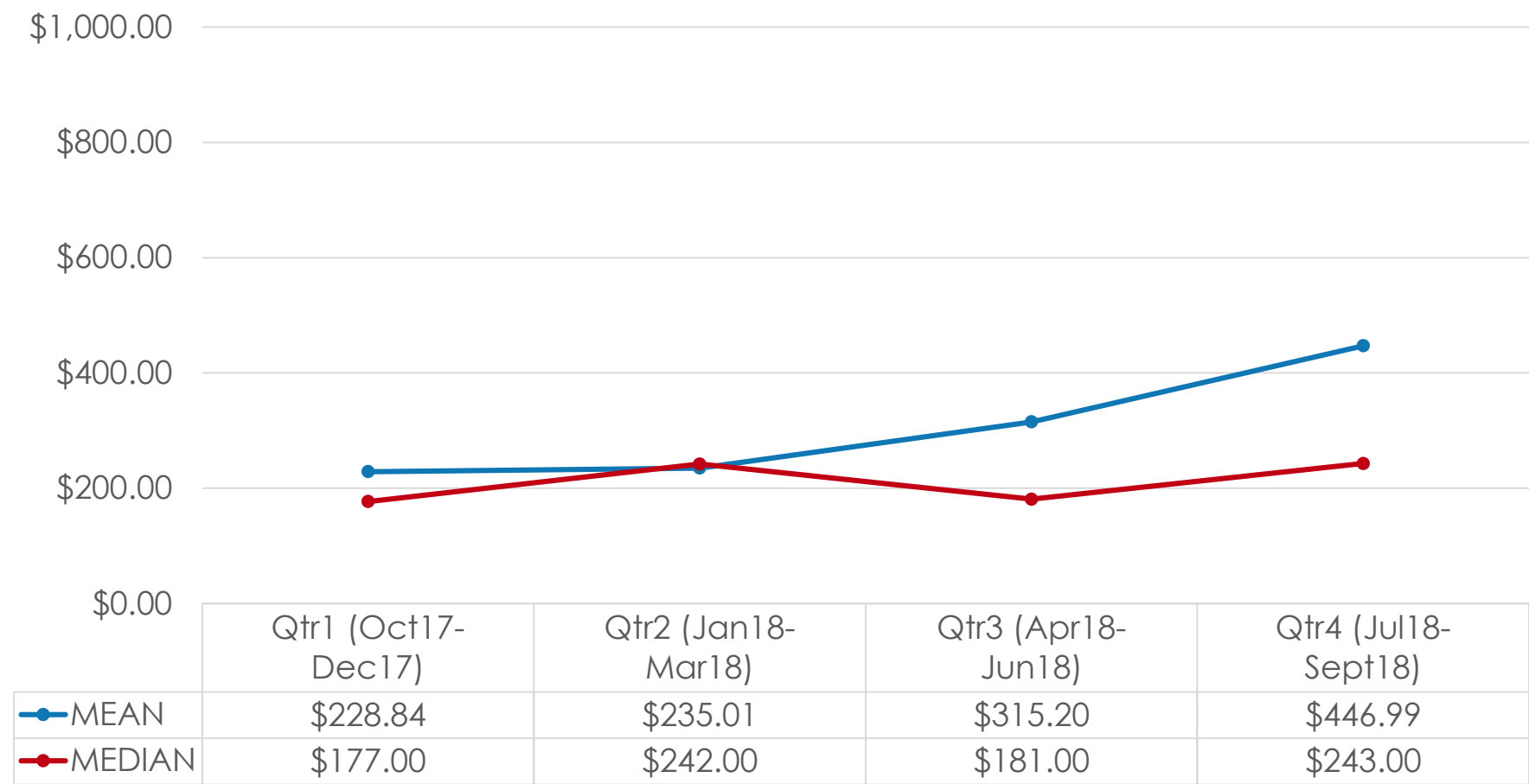
Prepaid– FY2018 Tracking
Accommodations w/ Meal Only

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$334.38	$193.87	$38.11	$210.49
MEDIAN	$393.00	$194.00	$38.00	$177.00
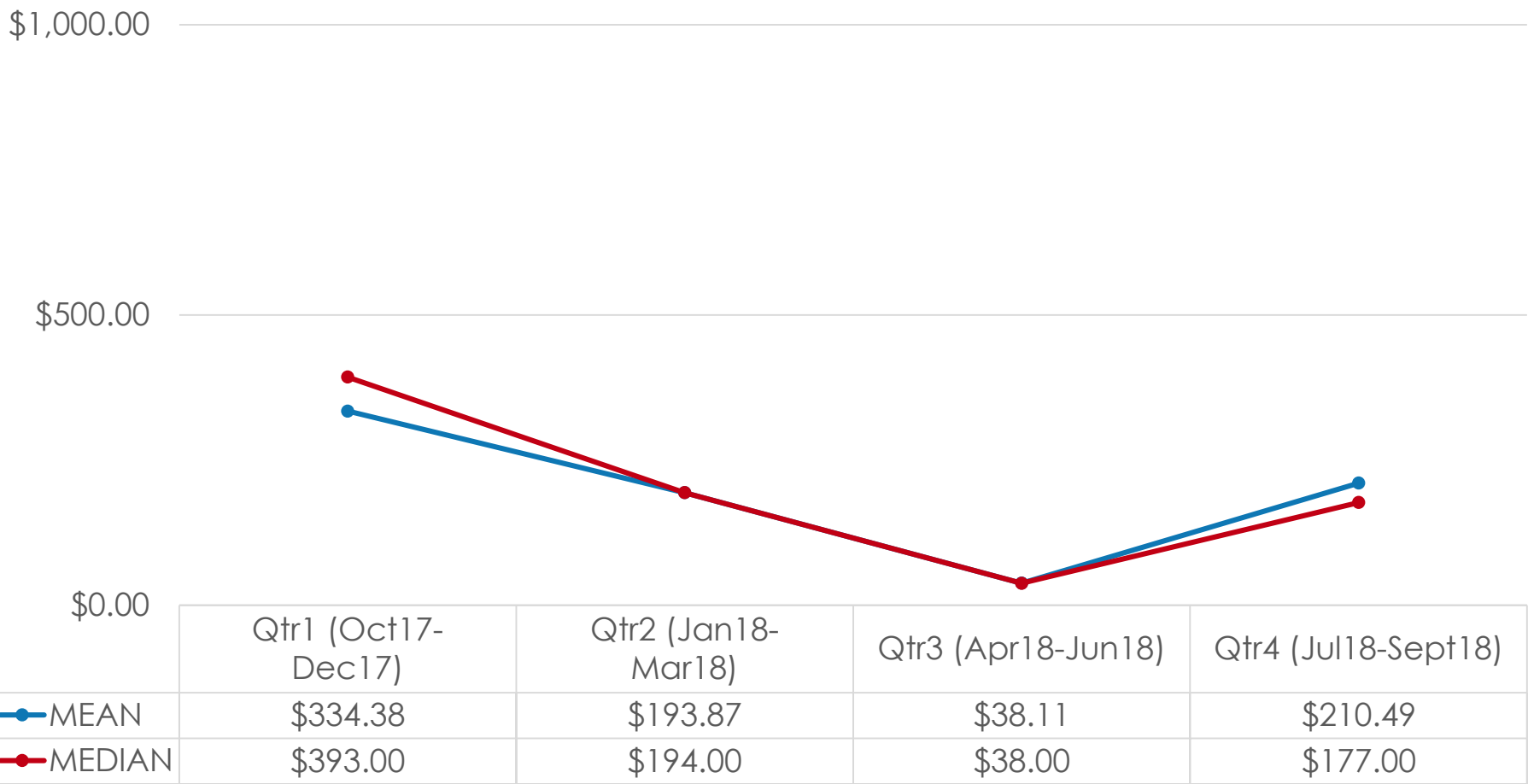
Prepaid– FY2018 Tracking
Food & Beverage in Hotel

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$135.53	$154.12	$236.69	$127.44
MEDIAN	$98.00	$97.00	$95.00	$84.00

[A]
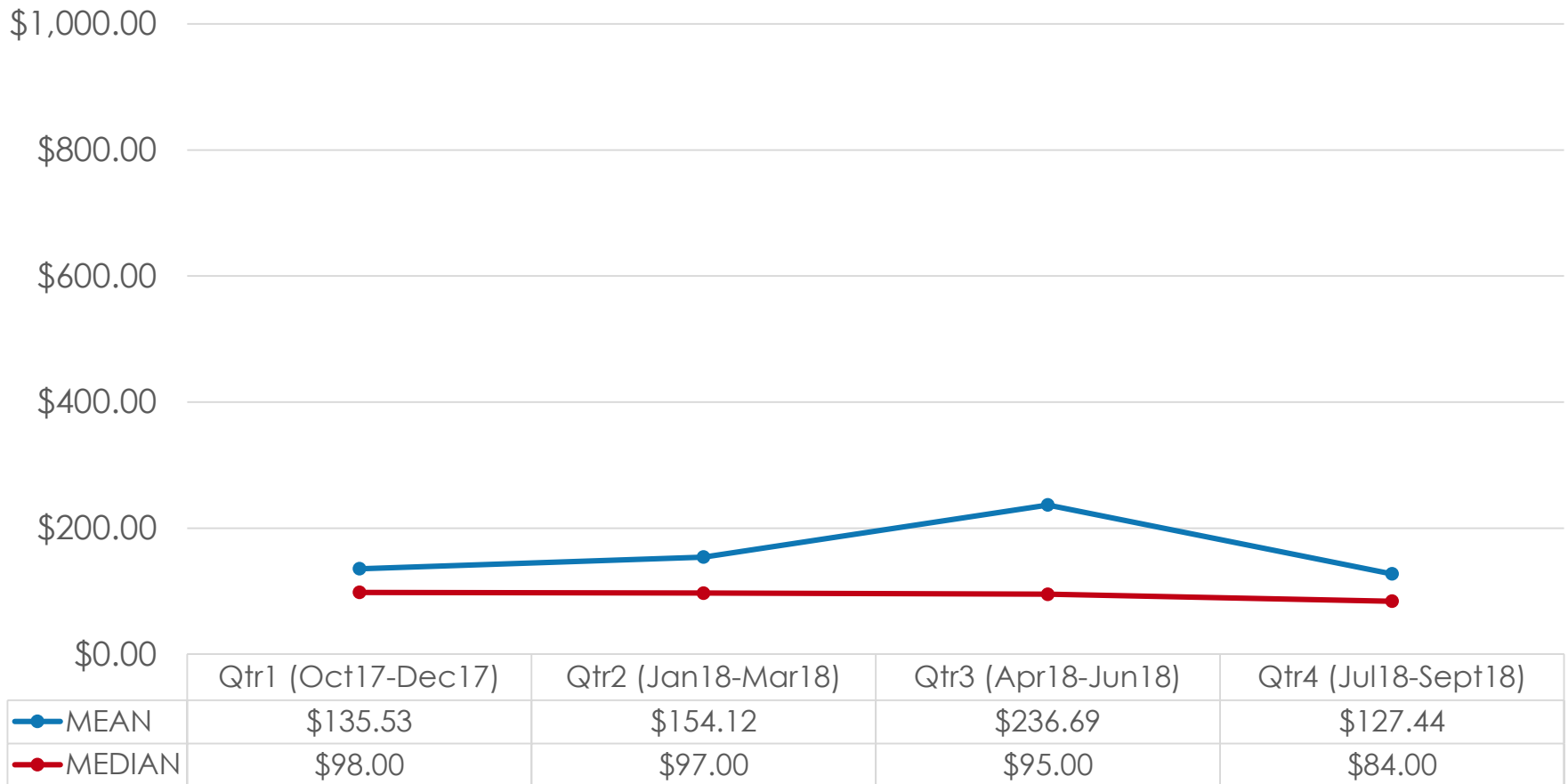
Prepaid– FY2018 Tracking
Ground Transportation - Philippines
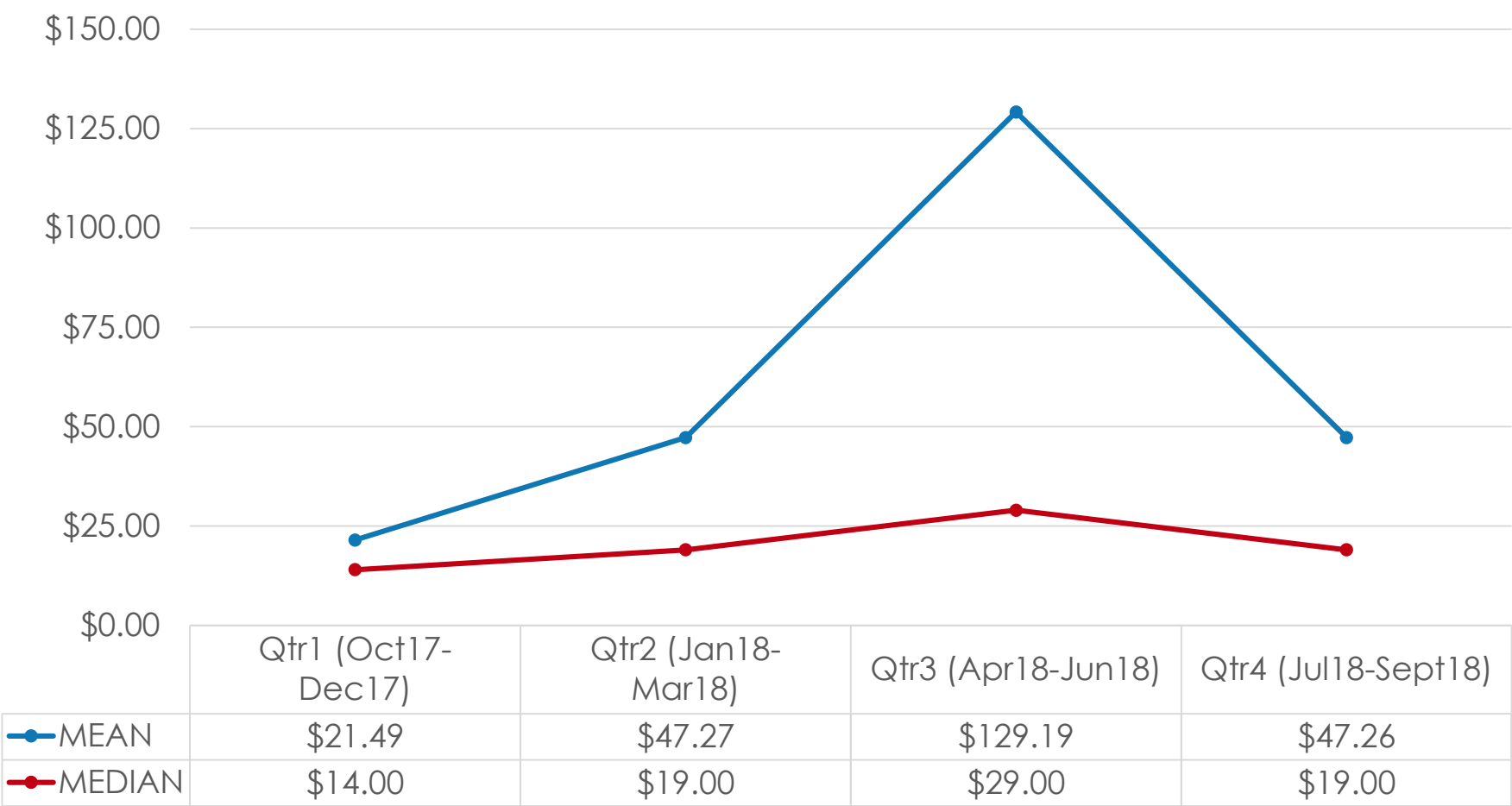
	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$21.49	$47.27	$129.19	$47.26
MEDIAN	$14.00	$19.00	$29.00	$19.00

[A]

Prepaid– FY2018 Tracking
Ground Transportation - Guam

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$86.19	$92.20	$128.28	$132.88
MEDIAN	$69.00	$60.00	$95.00	$93.00

[A]
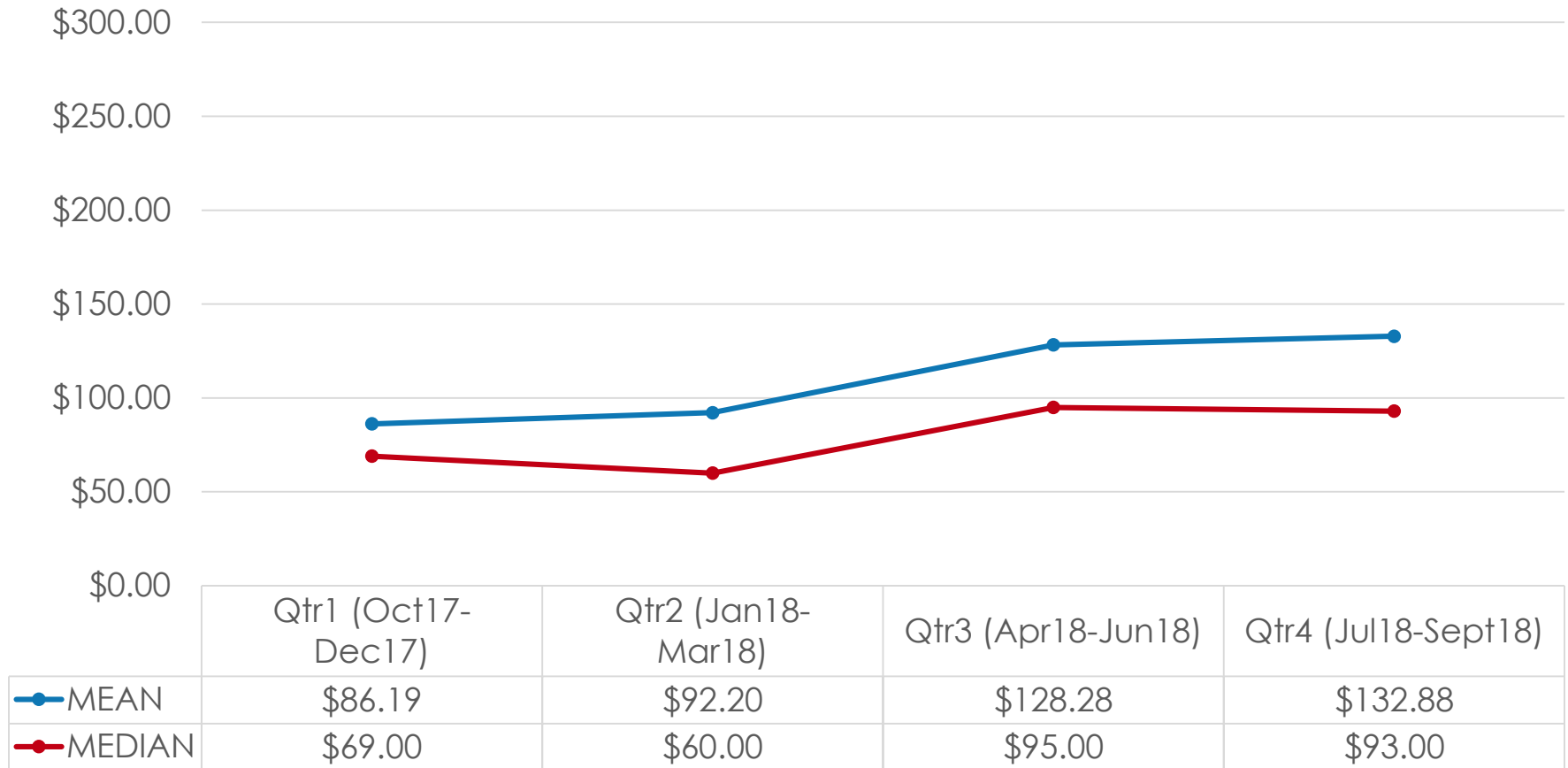
Prepaid– FY2018 Tracking
Optional tours/ Activities

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$298.49	$123.59	$158.37	$130.14
MEDIAN	$246.00	$79.00	$95.00	$103.00

[A]
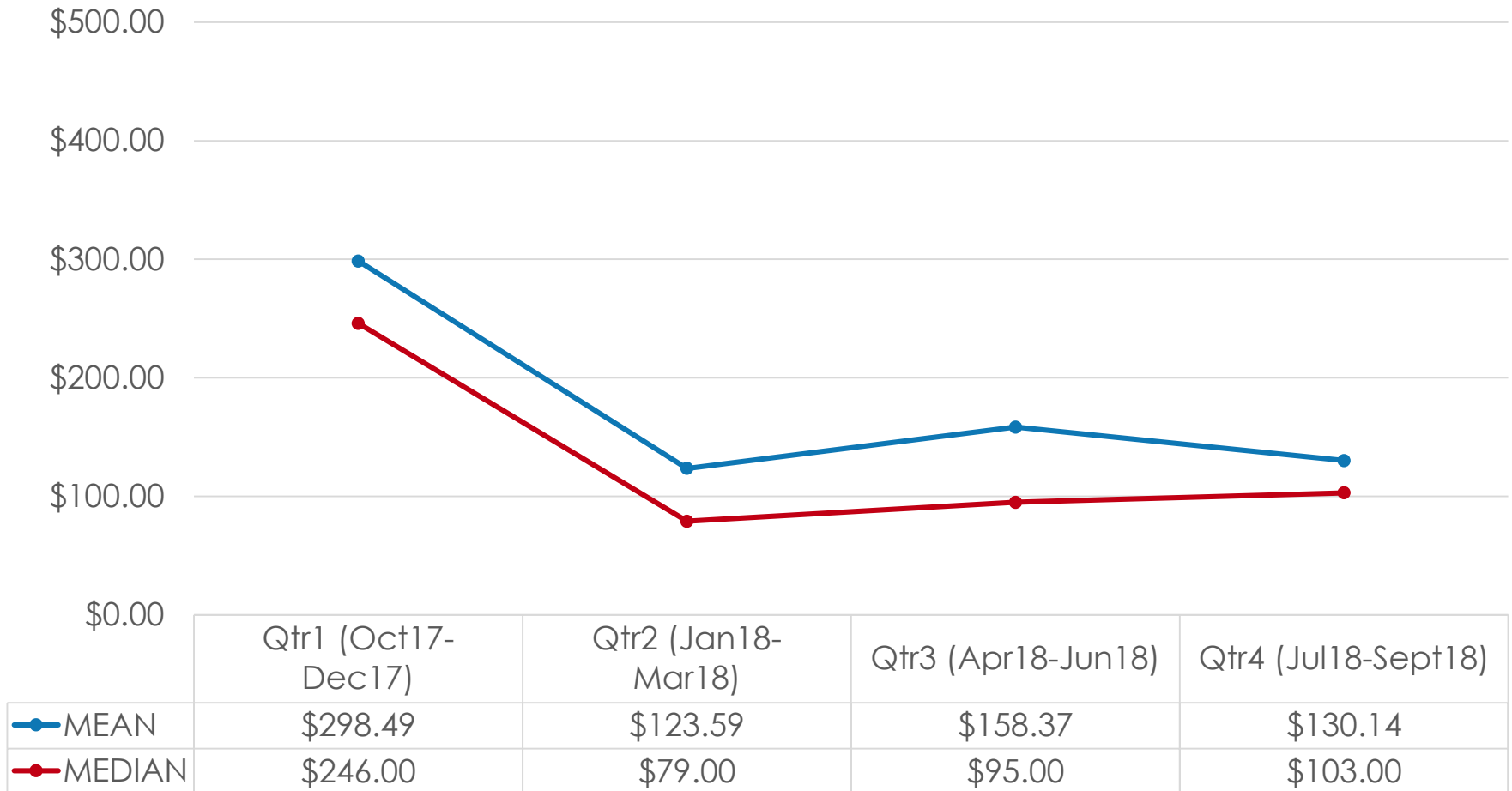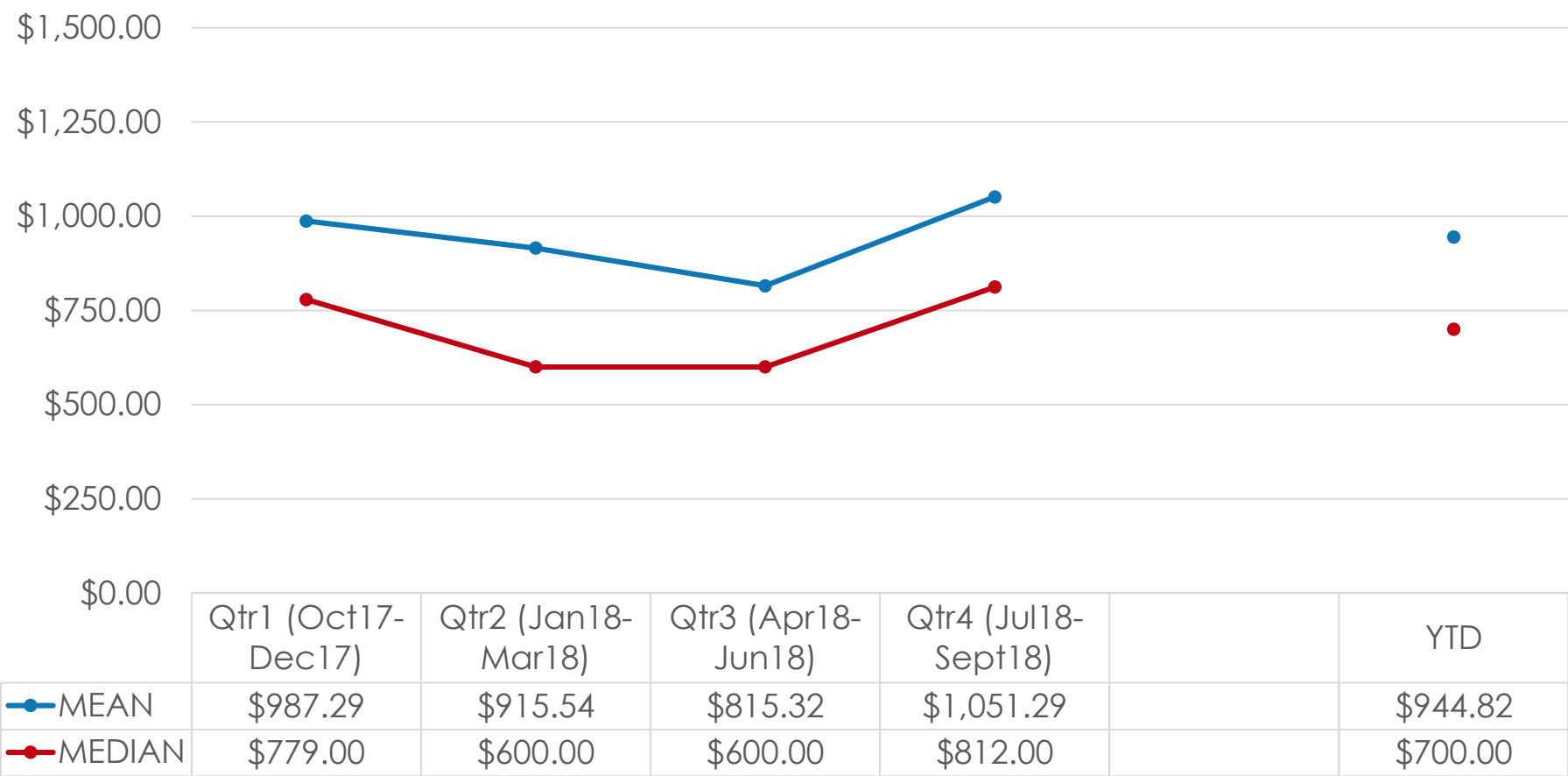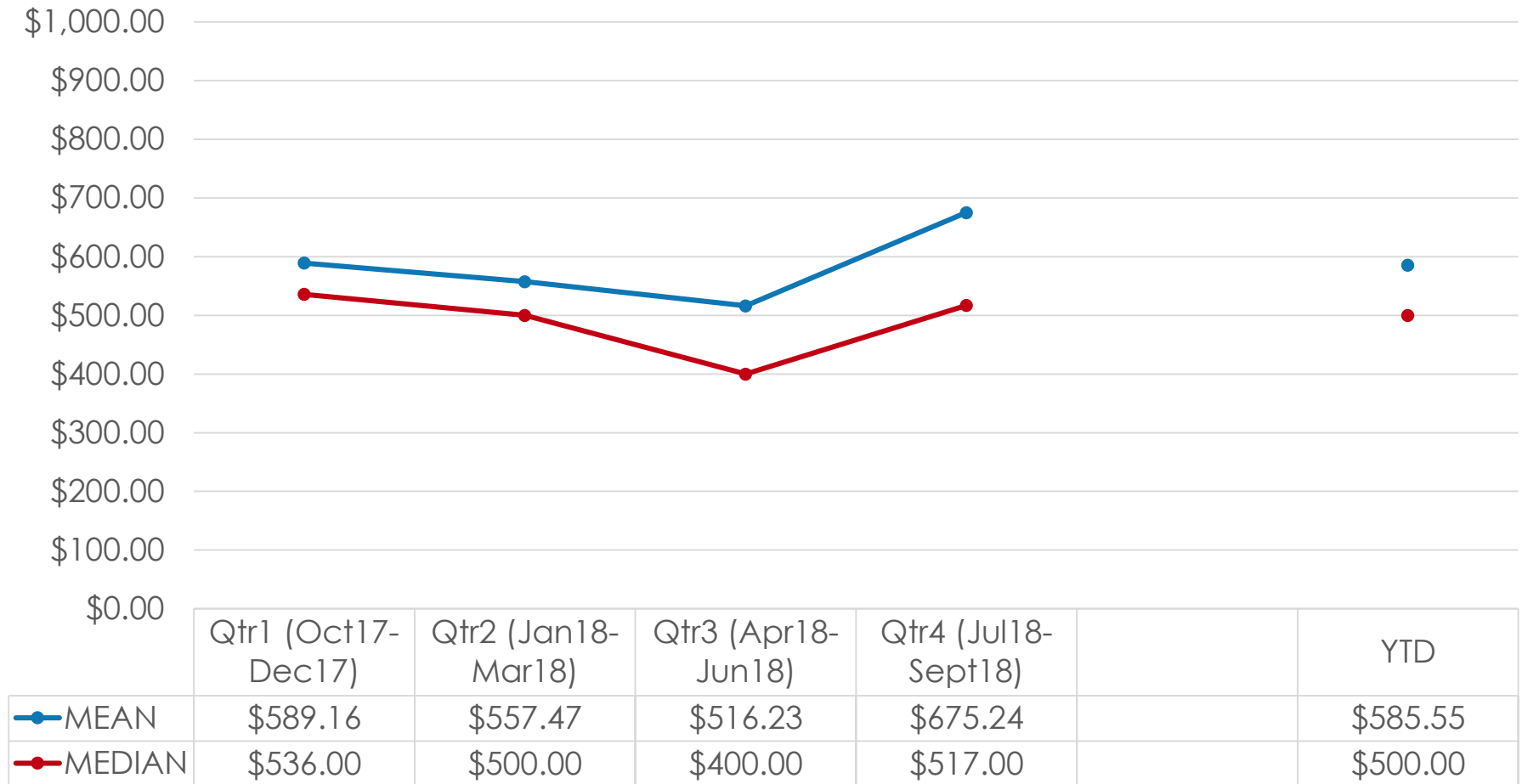
On-Island Expenditures

- $1,051.29 = overall mean average on-island expense (for entire travel party size) by respondent

- $675.24 = overall mean average <u>per person</u> on-island expenditures

[A]

On-Island Entire Travel Party – FY2018 Tracking

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
MEAN	$987.29	$915.54	$815.32	$1,051.29		$944.82
MEDIAN	$779.00	$600.00	$600.00	$812.00		$700.00

[A]

On-Island Per Person – FY2018 Tracking

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
MEAN	$589.16	$557.47	$516.23	$675.24		$585.55
MEDIAN	$536.00	$500.00	$400.00	$517.00		$500.00

[A]

On-Island Per Person – Key Segments

GVB EXIT SURVEY
Q11A ONISLE EXPENDITURE- PER PERSO

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
ONISLE PP	Mean	$675.24	$1,275.00	$711.05	$689.91	$546.25
	Median	$517	$1,275	$567	$532	$450

Prepared by Anthology Research

[A]

Per Person MEAN expenditures – FY2018 Tracking On-Island/ Prepaid

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
On-Island	$589.16	$557.47	$516.23	$675.24		$585.55
Prepaid	$540.67	$551.84	$633.35	$603.32		$581.65

[A]
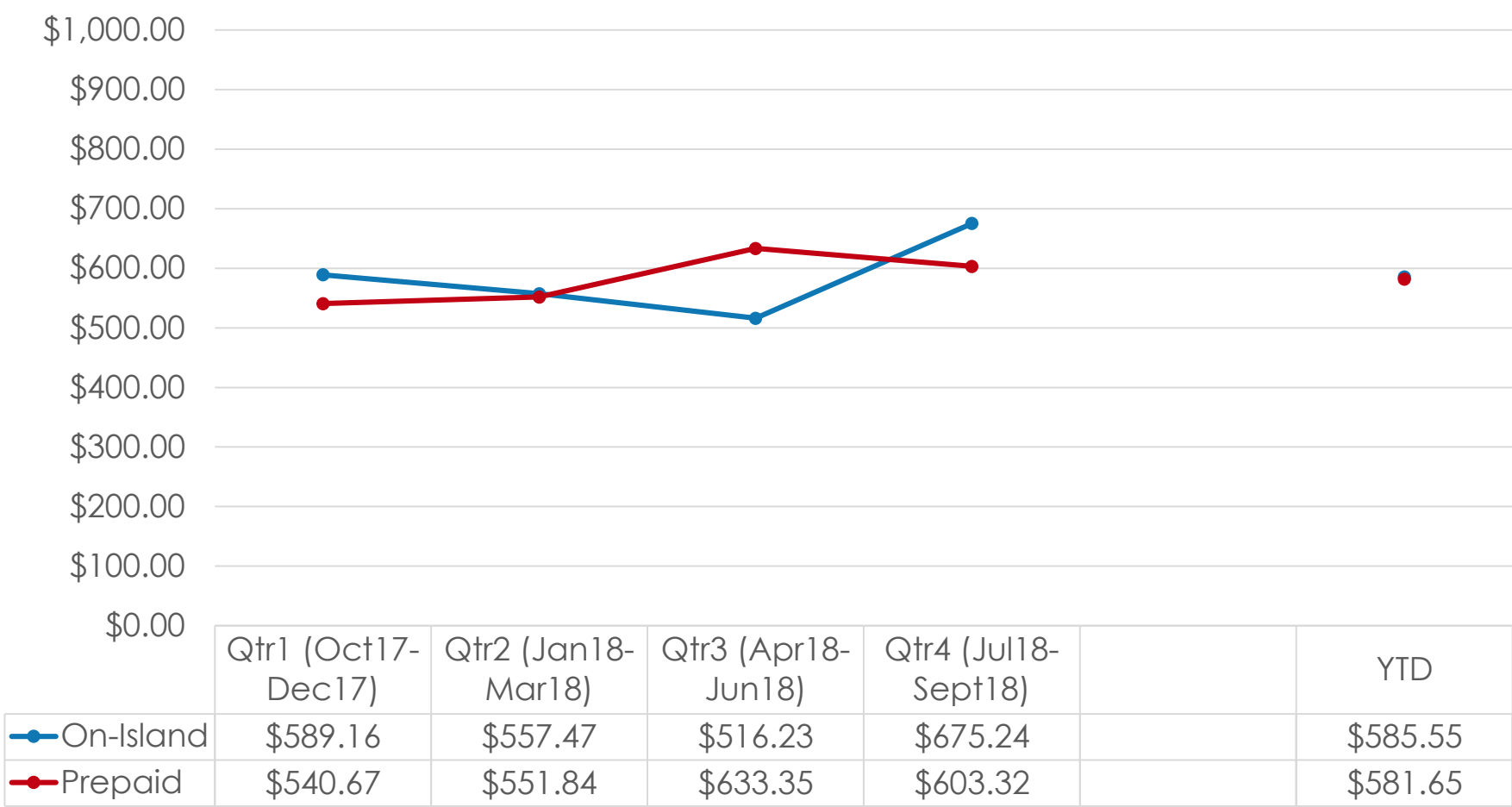
On-Island Per Day Spending – FY2018 Tracking MEAN

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
Per Person	$144.40	$164.71	$119.37	$169.10		$149.80
Travel Party	$237.41	$263.32	$198.68	$262.58		$241.12

[A]
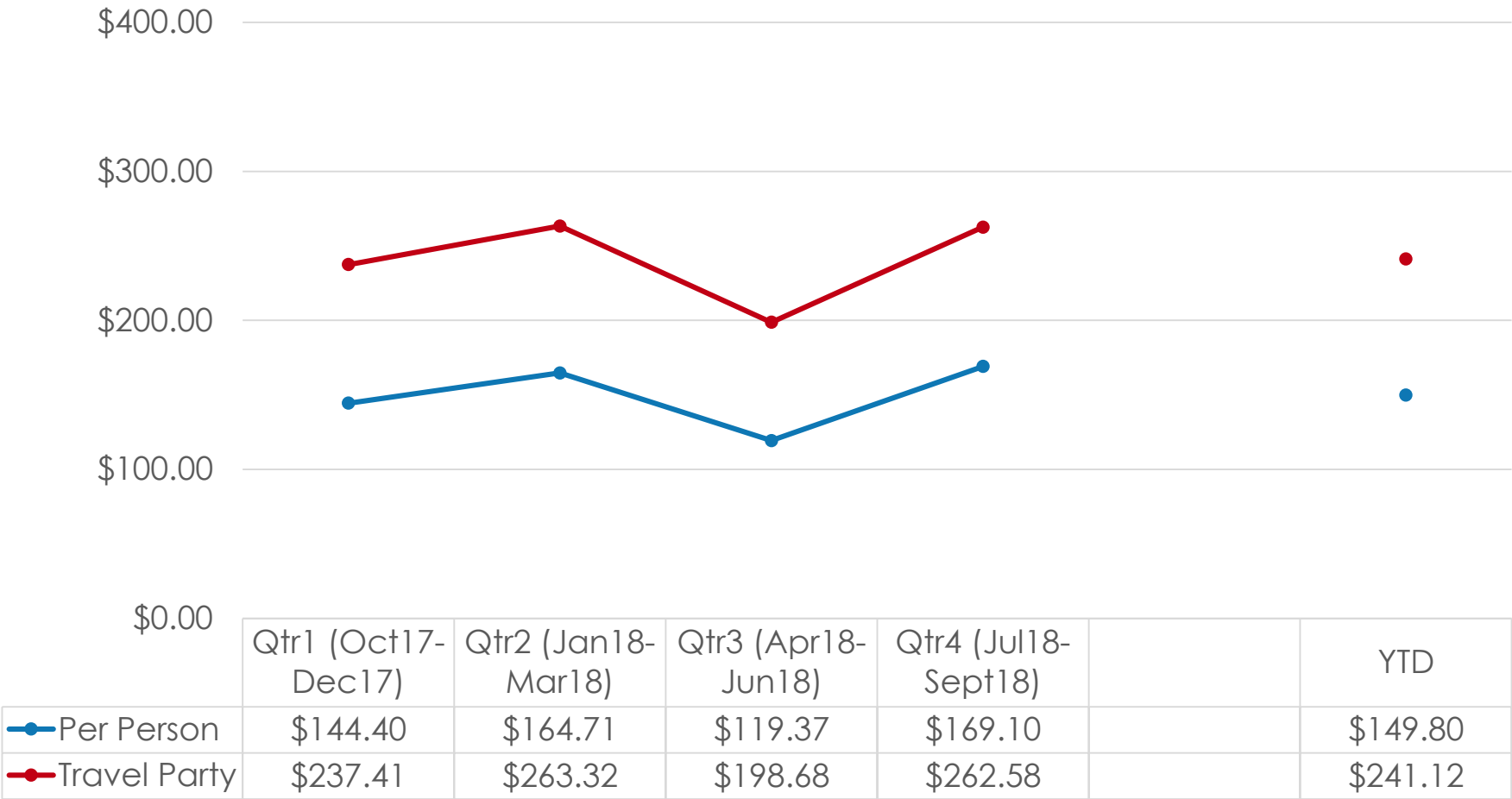
On-Island Expenses by Category – MEAN Entire Travel Party

Category	Mean
F&B Hotel	$38.03
F&B Fast Food/Conv Store	$86.04
F&B Restaurant	$156.55
Optional Tour	$81.72
Gift- Self	$282.26
Gift-Others	$135.86
Local Trans	$59.97
Other	$89.82

[A]

On-Island – FY2018 Tracking
Food & Beverage - Hotel

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$51.27	$35.95	$13.19	$38.03

[A]
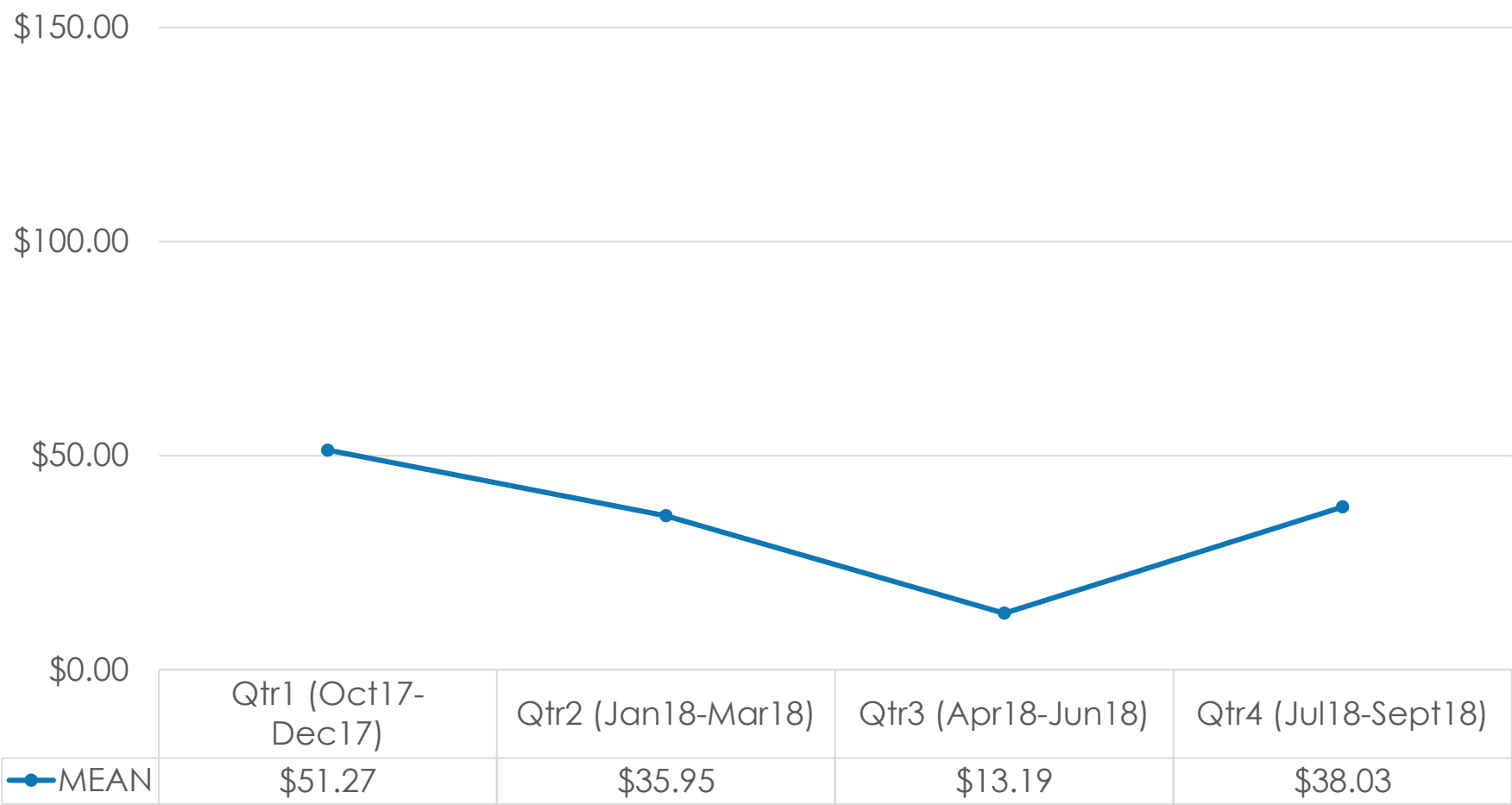
On-Island – FY2018 Tracking
Food & Beverage – Fast Food/ Convenience Store

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$67.62	$93.41	$96.03	$86.04

[A]
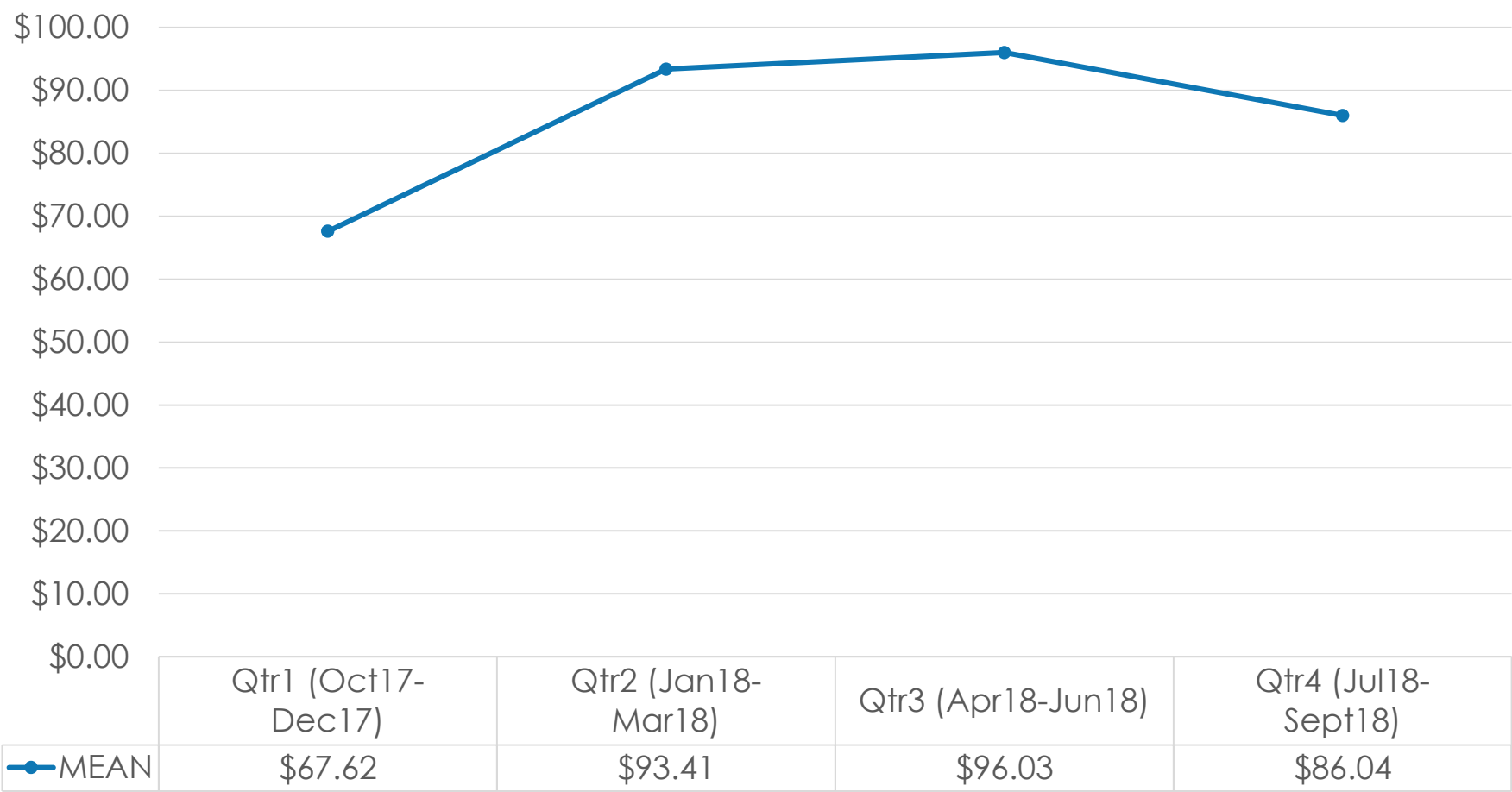
On-Island – FY2018 Tracking
Food & Beverage – Restaurant/ Drinking Est Outside Hotel

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$127.93	$117.76	$128.77	$156.55

[A]
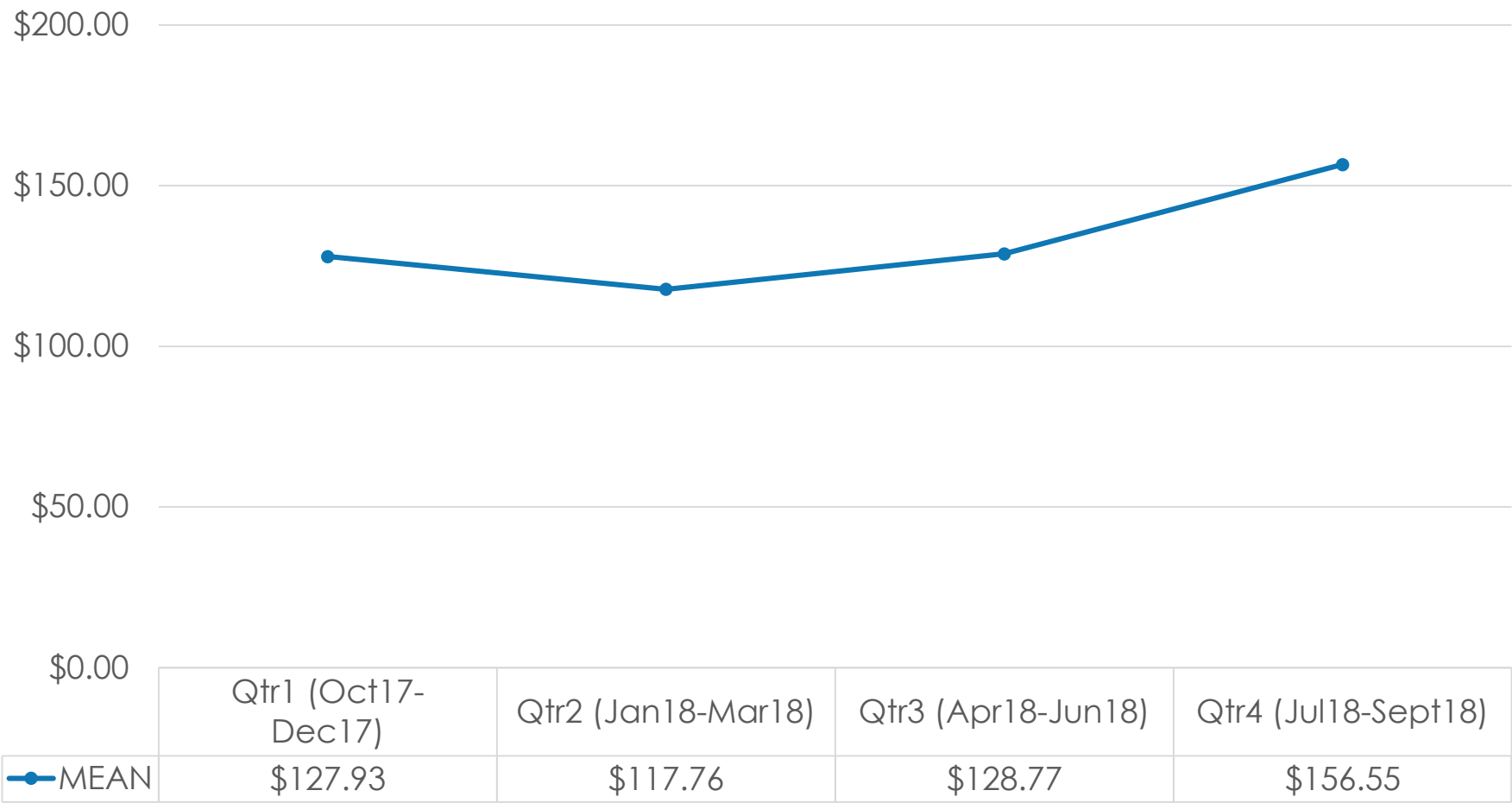
On-Island – FY2018 Tracking
Optional tour/ Activities

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$48.69	$55.93	$57.84	$81.72

[A]
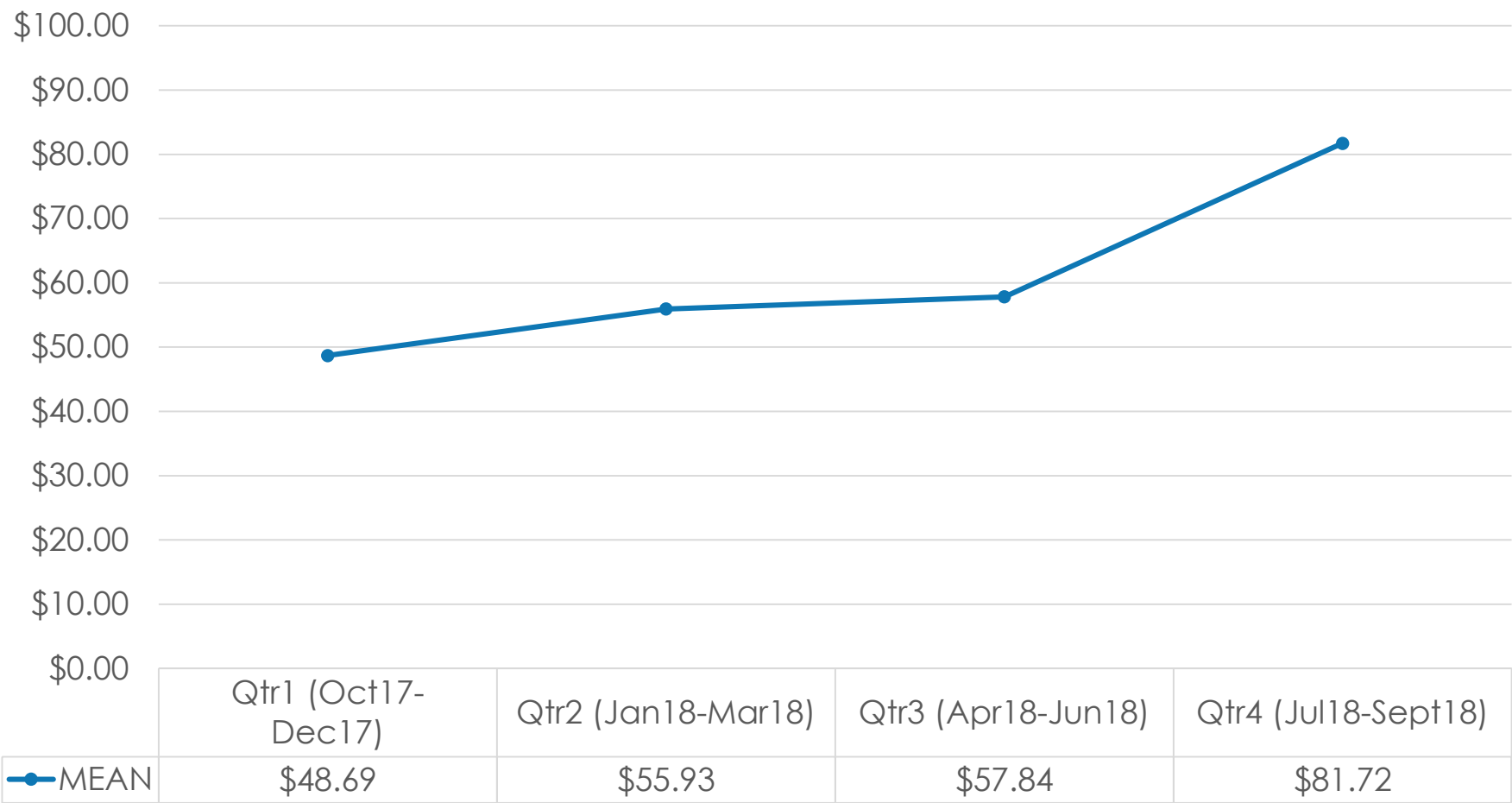
On-Island – FY2018 Tracking
Gift/ Souvenir – Self/ Companion

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$156.98	$148.50	$119.20	$282.26

[A]
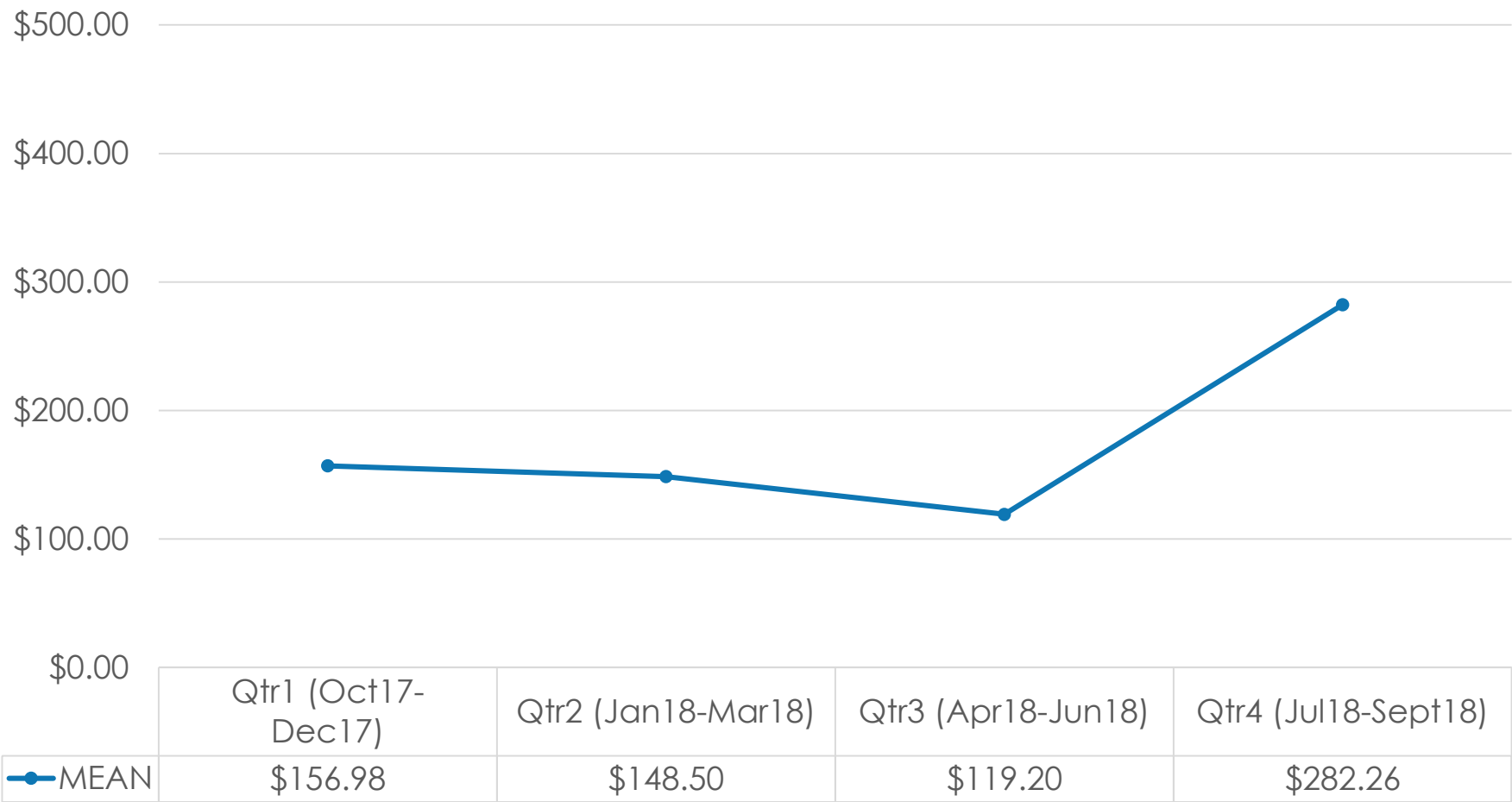
On-Island – FY2018 Tracking
Gift/ Souvenir – Friends/ Family

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$201.61	$120.22	$90.87	$135.86

[A]
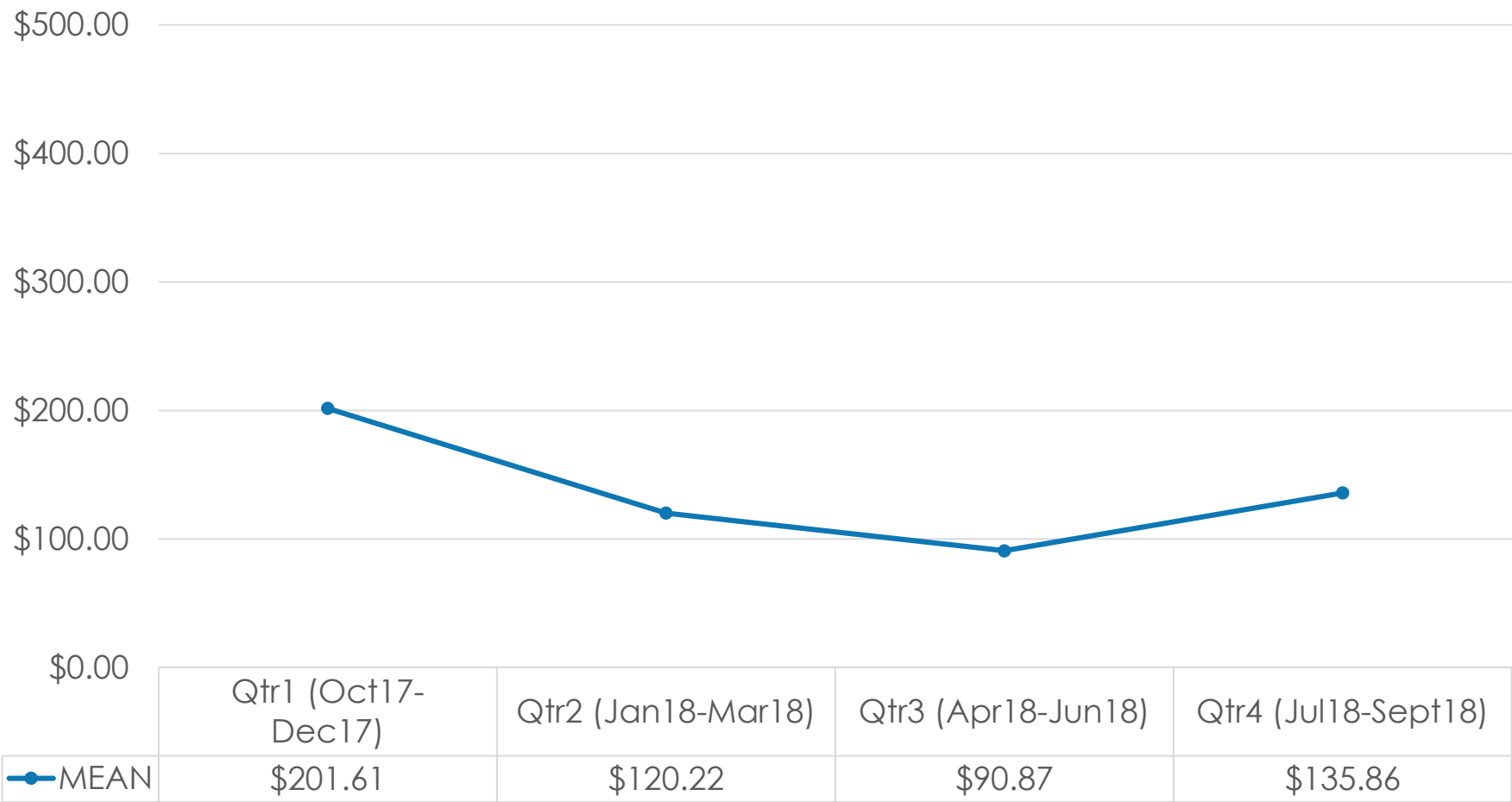
On-Island – FY2018 Tracking
Local Transportation

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$77.88	$69.86	$55.14	$59.97

[A]
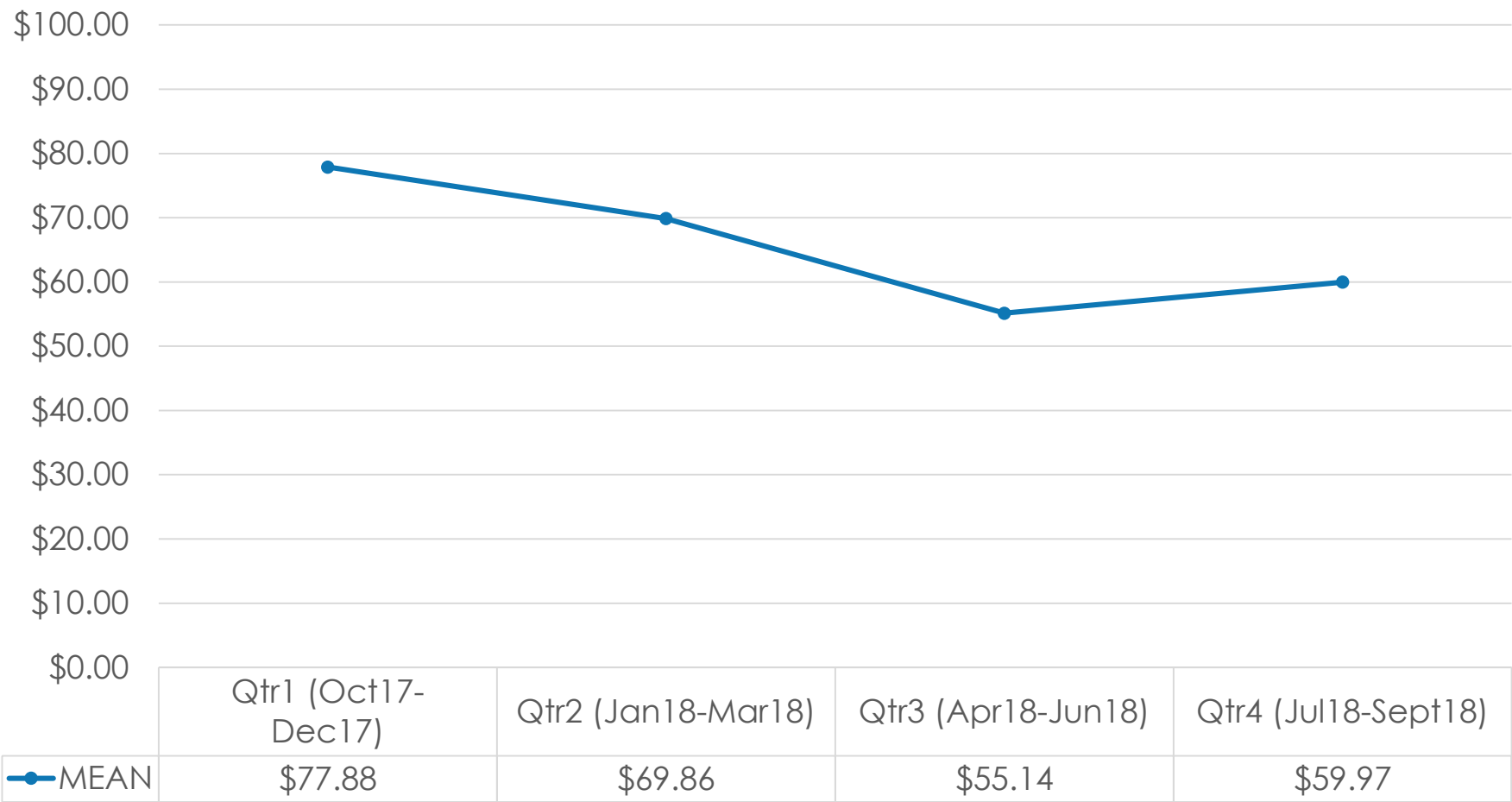
On-Island – FY2018 Tracking
Other Not Included

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$117.65	$129.64	$101.99	$89.82

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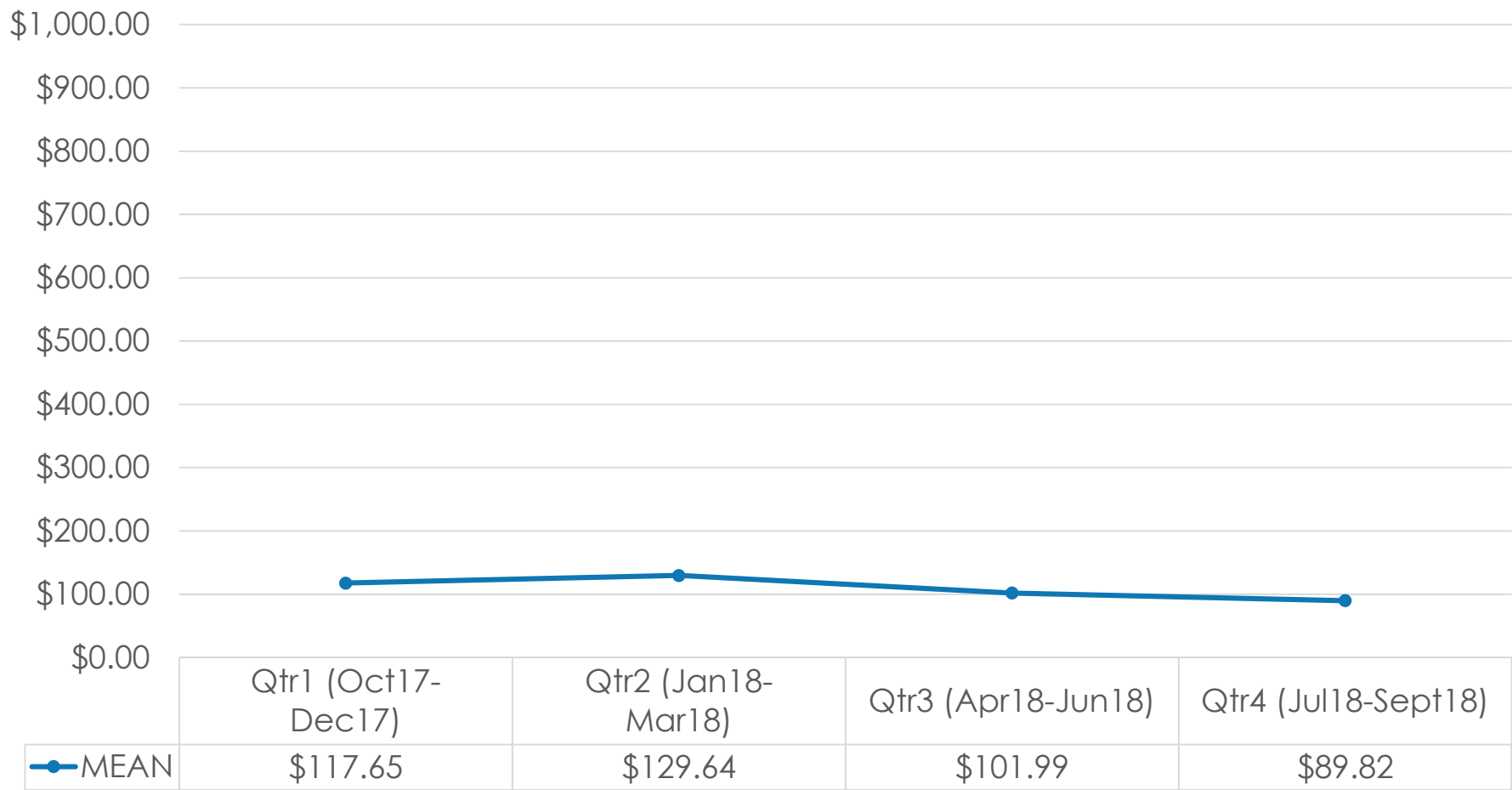
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- $1,284.16 = overall mean average prepaid expense by respondent/ Per Person

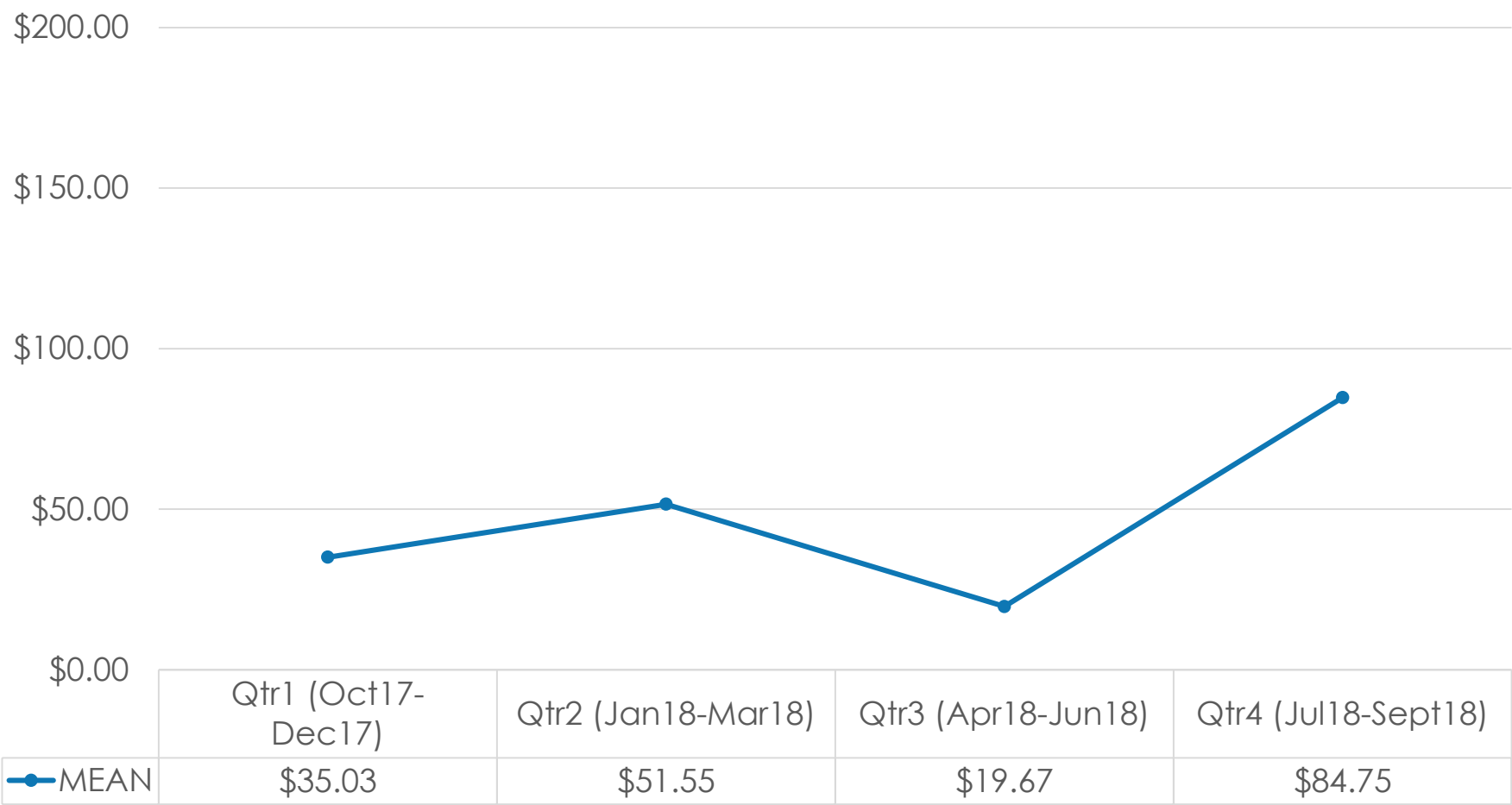[A]

TOTAL Per Person Expenditures – FY2018 Tracking

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
MEAN	$1,130.75	$1,109.31	$1,149.58	$1,284.16		$1,168.95
MEDIAN	$991.00	$1,055.00	$1,058.00	$1,088.00		$1,037.00

[A]
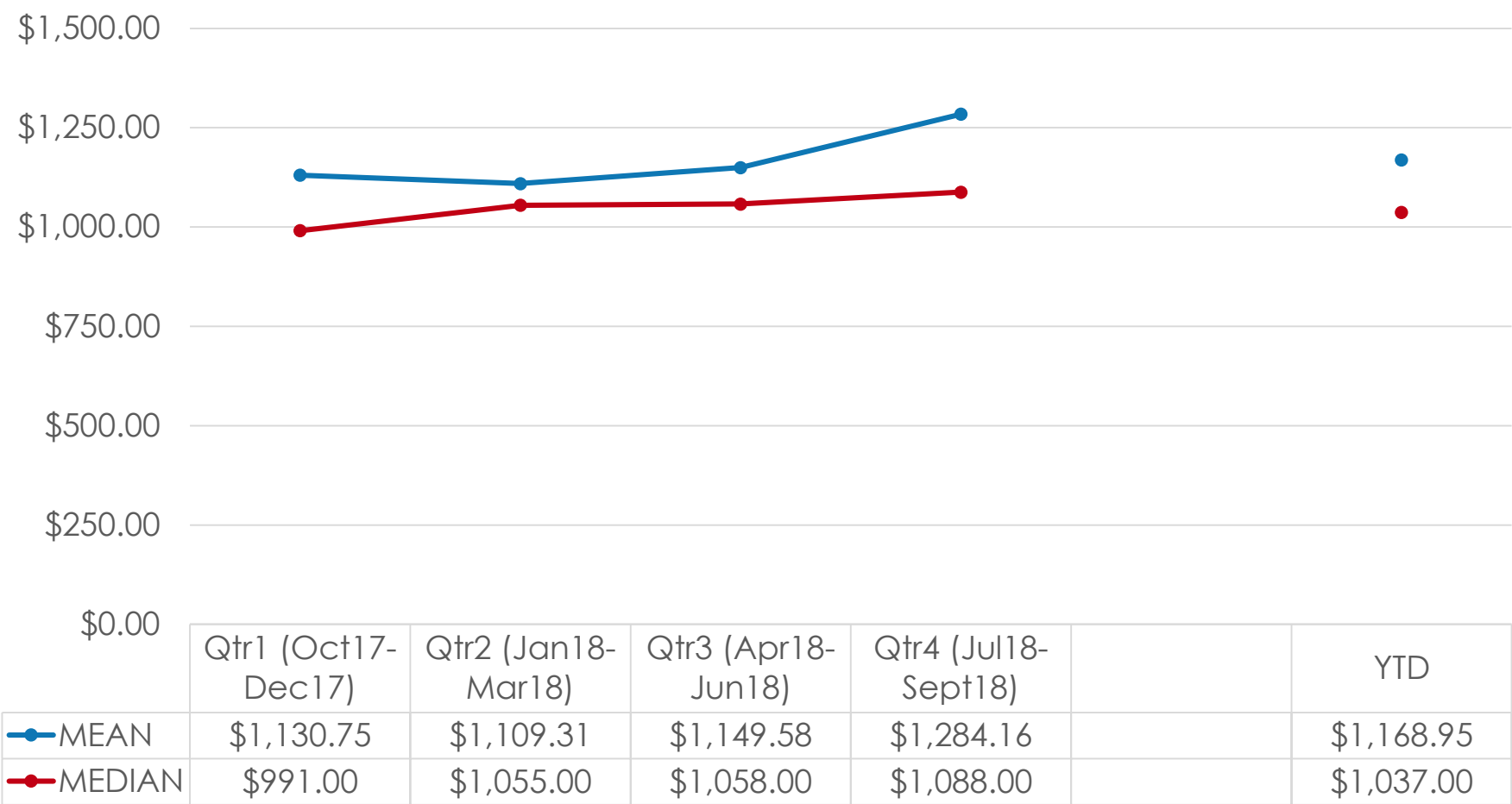
TOTAL Per Person Expenditures – Key Segments

GVB EXIT SURVEY
TOTAL PER PERSON SPENDING:

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
TOTAL PP	Mean	$1,284.16	$2,670.96	$1,304.57	$1,315.60	$1,094.22
	Median	$1,088	$2,671	$1,154	$1,134	$967

Prepared by Anthology Research

[A]

GUAM AIRPORT EXPENDITURE – FY2018 Tracking

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
MEAN	$35.03	$51.55	$19.67	$84.75

[A]

SECTION 4
VISITOR SATISFACTION BEHAVIOR

OVERALL SATISFACTION

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

[A]

Positive Aspect of Trip

Category	Percentage
Relaxing	27%
Friendly/ Warm ppl	23%
Shopping	22%
Beach/ Ocean	10%
Natural beauty	9%
Local culture	3%
Weather	2%
Safety	2%
Event- fam/fr	1%

[A]

Negative Aspect of Trip

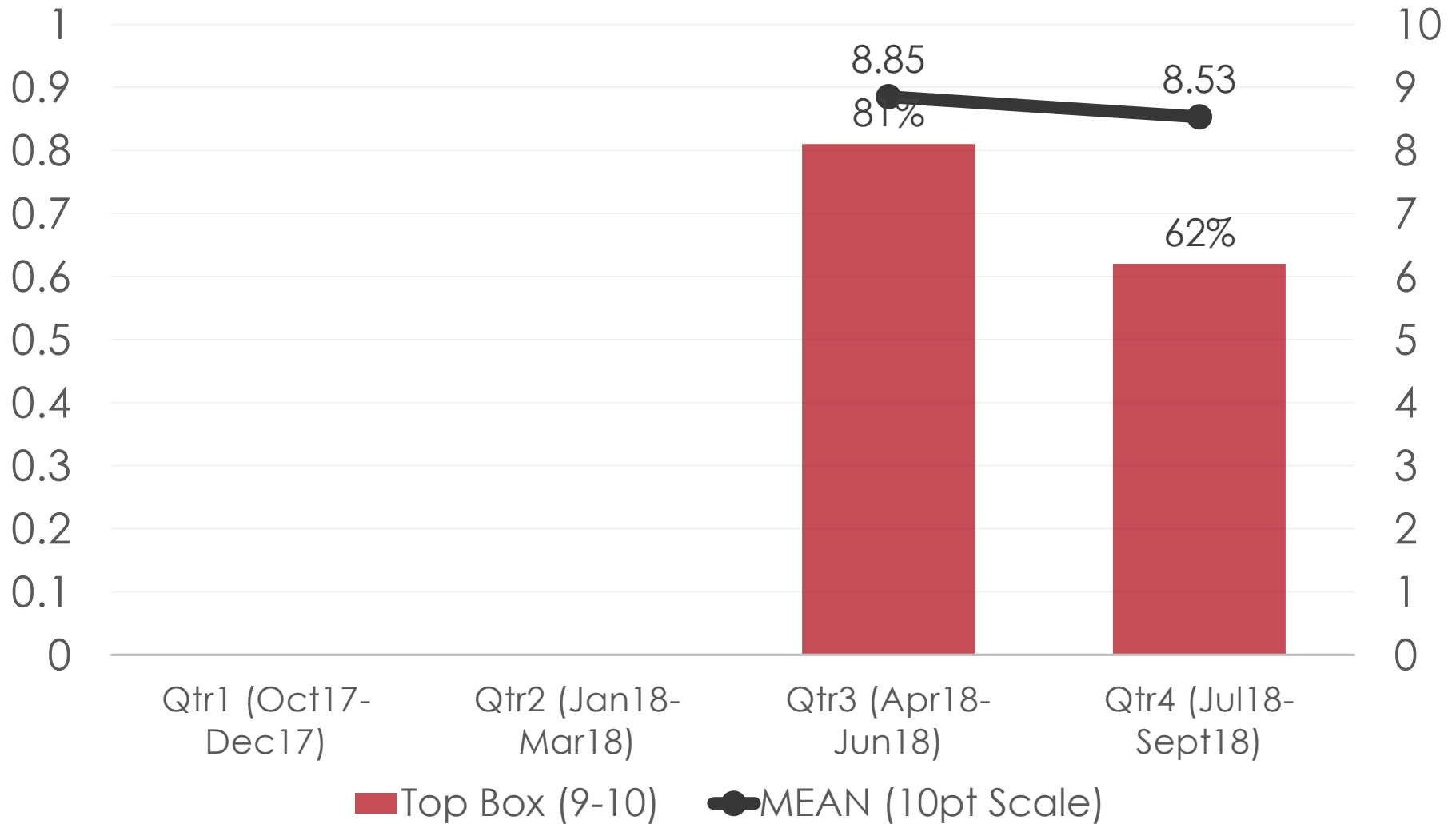| Category	Percentage
Nothing	54%
Expensive/ Cost	15%
Ground Trans	9%
Activities- variety	7%
Lack culture	5%
Accommodations- clean	3%
Food- variety	2%
Immigration	1%
Rental car	1%
Accommodations- not as promised	1%

[A]
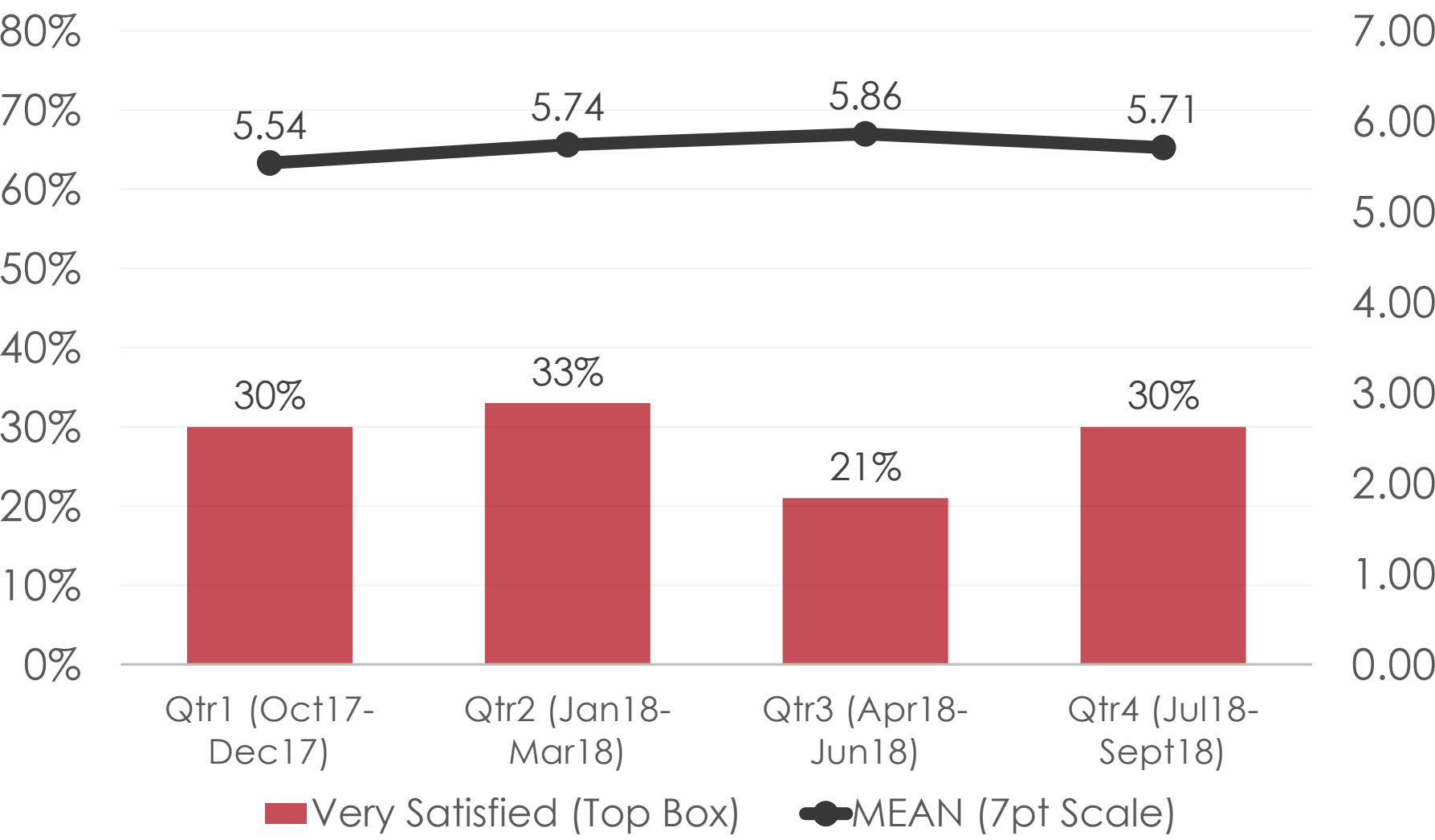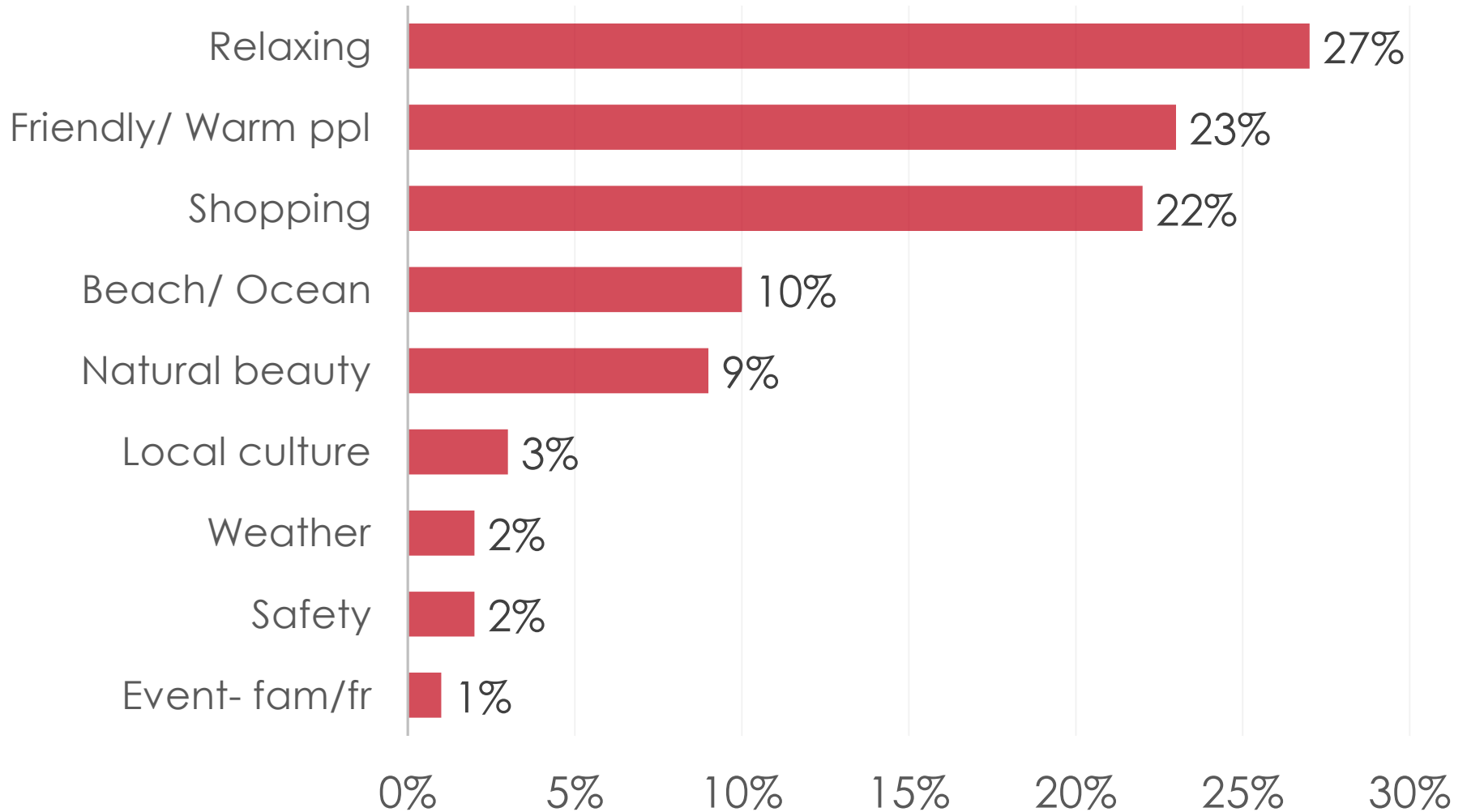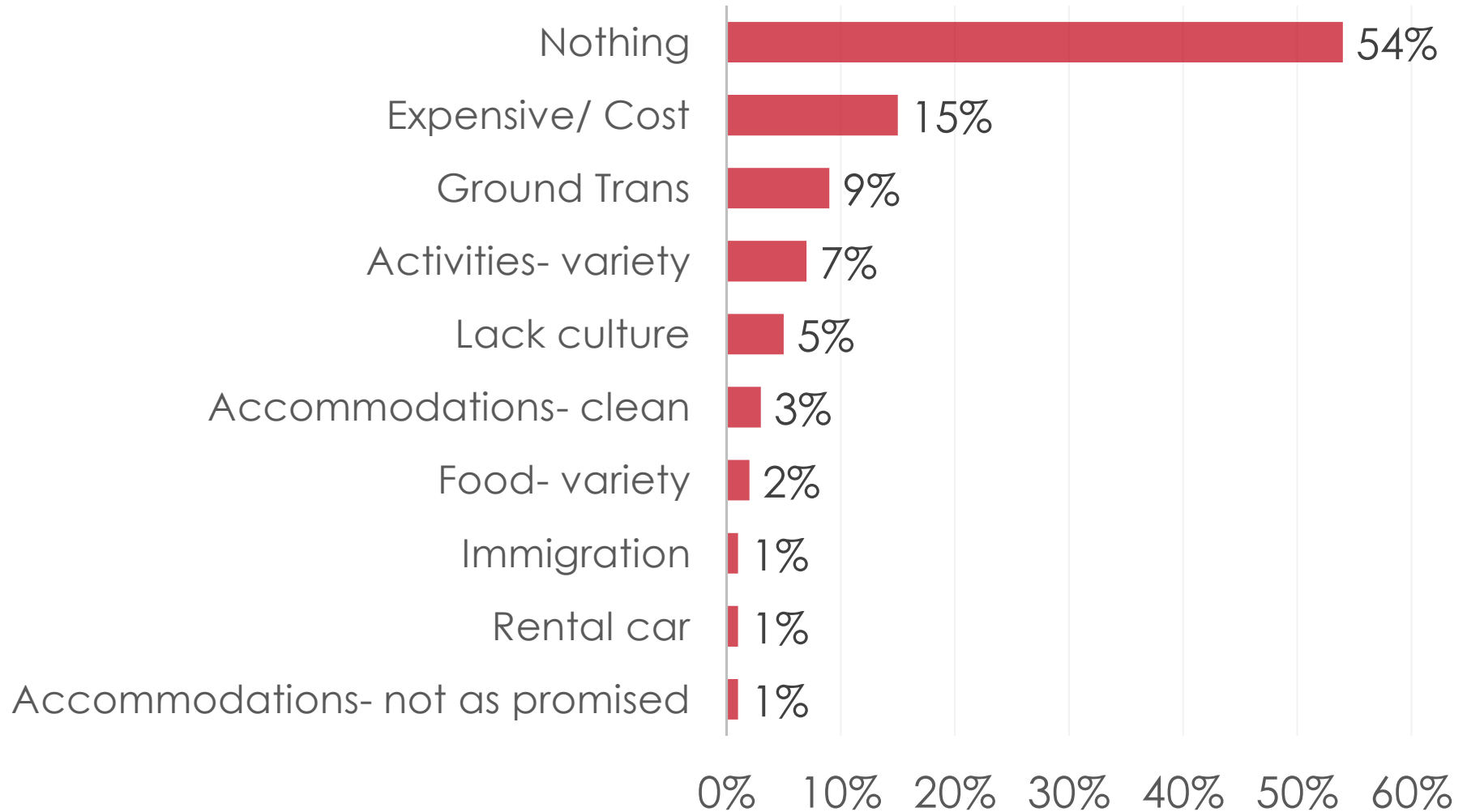
Guam was better than expected
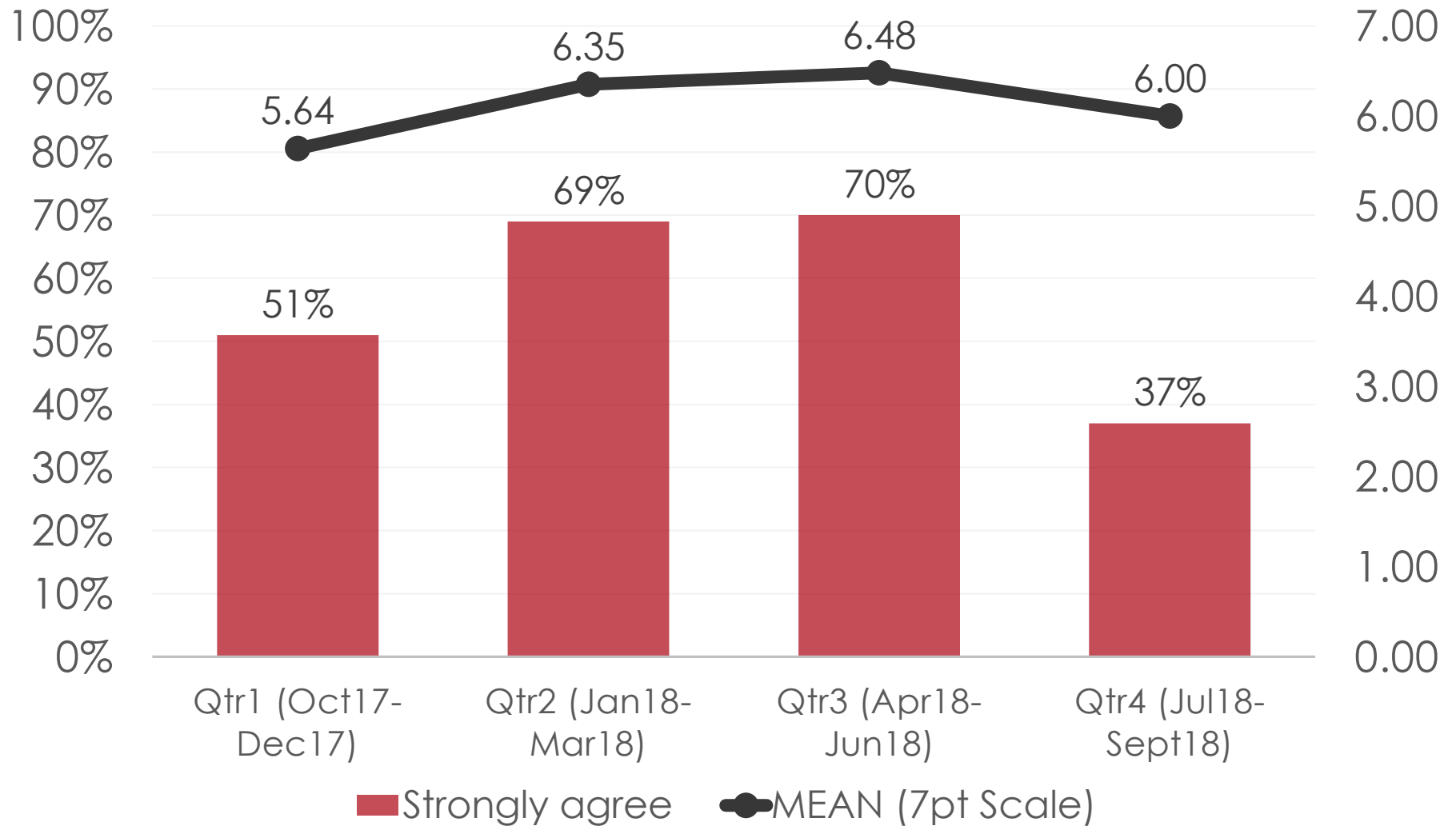
I had no communication problems

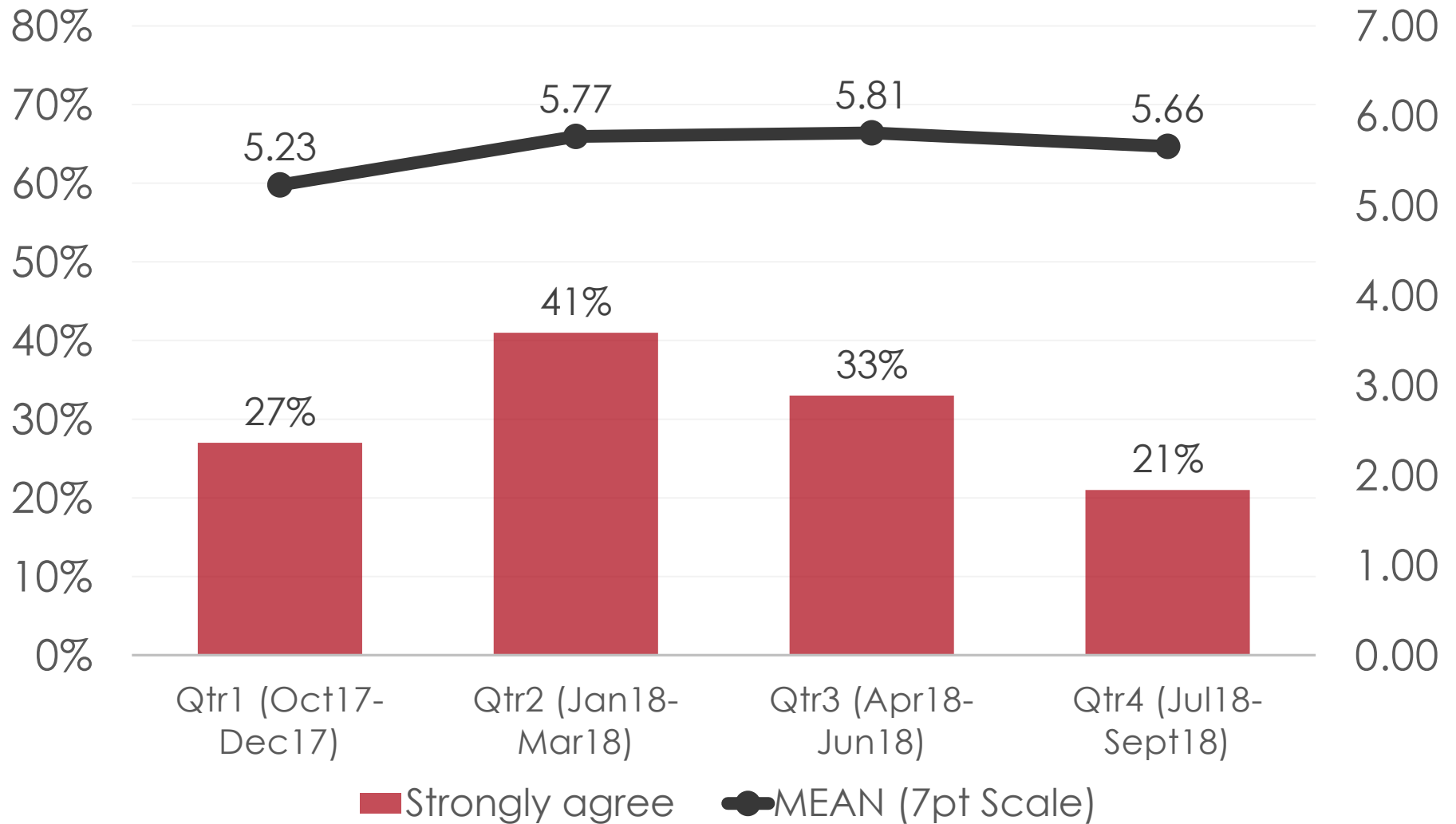# Recommend Guam - family & friends

Qtr1 (Oct17-Dec17) Qtr2 (Jan18-Mar18) Qtr3 (Apr18-Jun18) Qtr4 (Jul18-Sept18)

8.85 8.53
81% 62%

■ Top Box (9-10) ━●━ MEAN (10pt Scale)

[A]
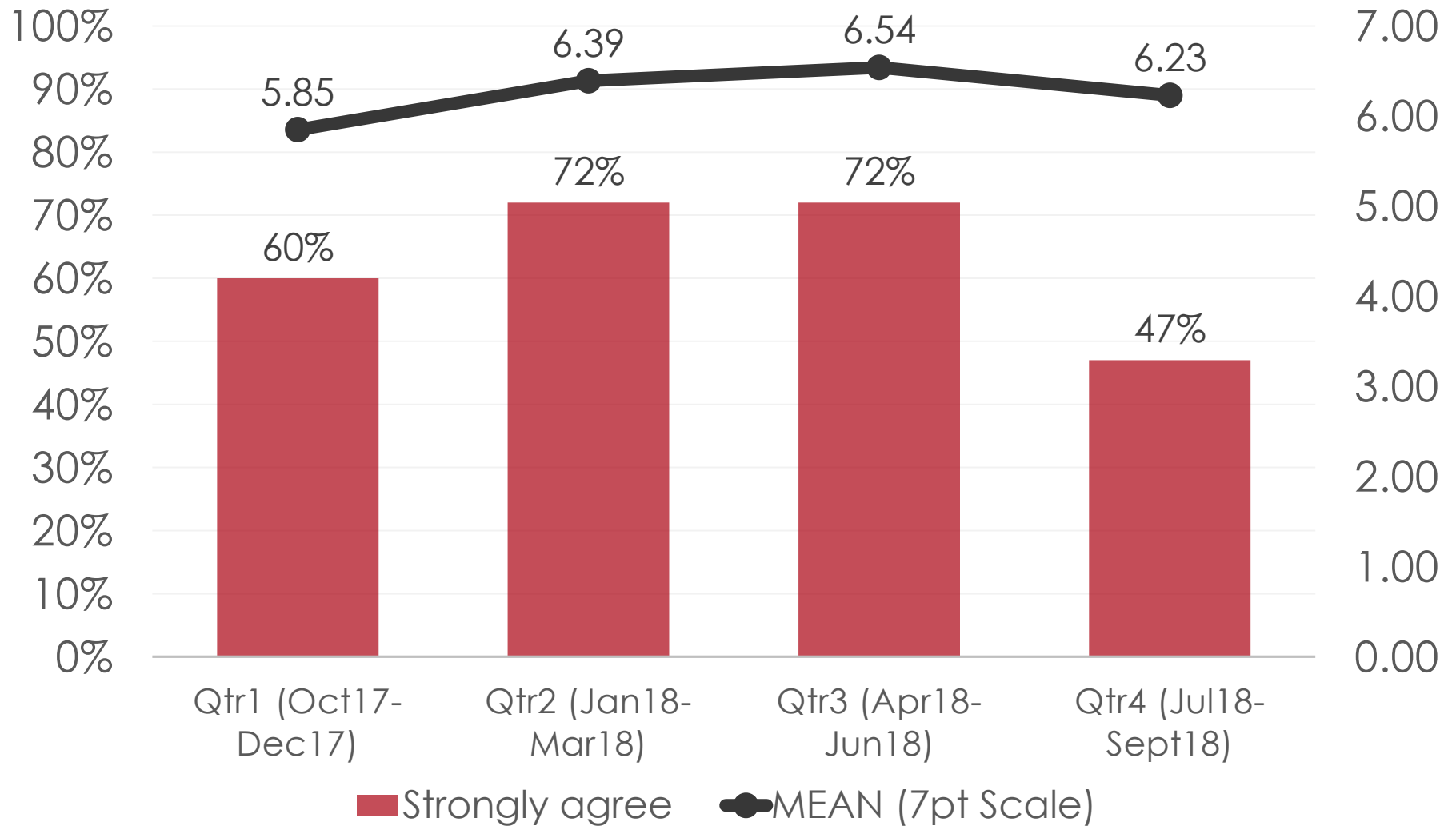
Sites on Guam were attractive

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Strongly agree	54%	61%	62%	39%
MEAN (7pt Scale)	5.65	6.22	6.42	6.10

[A]
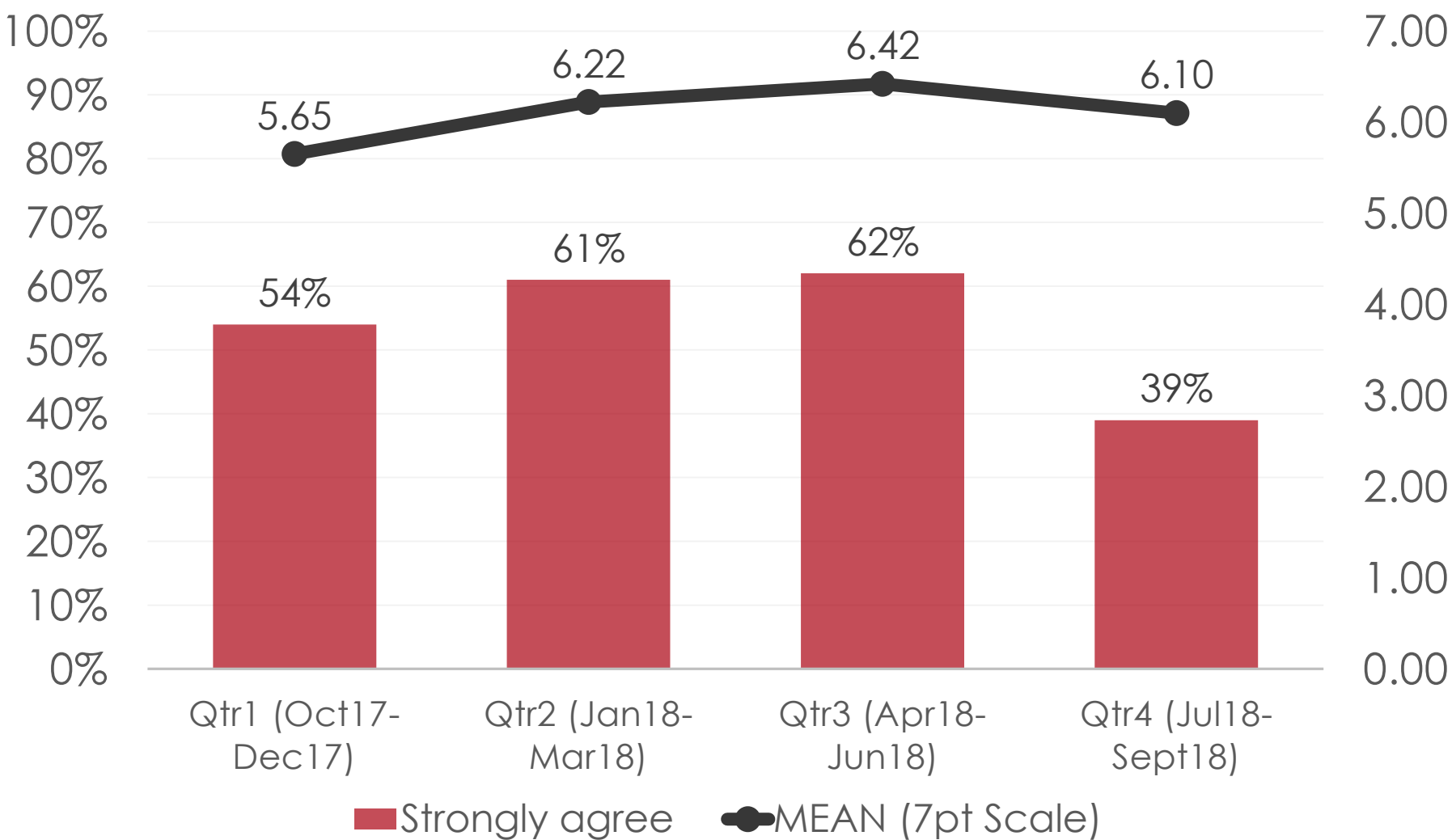
I plan to visit Guam again

60% — Qtr1 (Oct17-Dec17), 5.70
70% — Qtr2 (Jan18-Mar18), 6.34
72% — Qtr3 (Apr18-Jun18), 6.52
46% — Qtr4 (Jul18-Sept18), 6.20

Strongly agree   MEAN (7pt Scale)

[A]
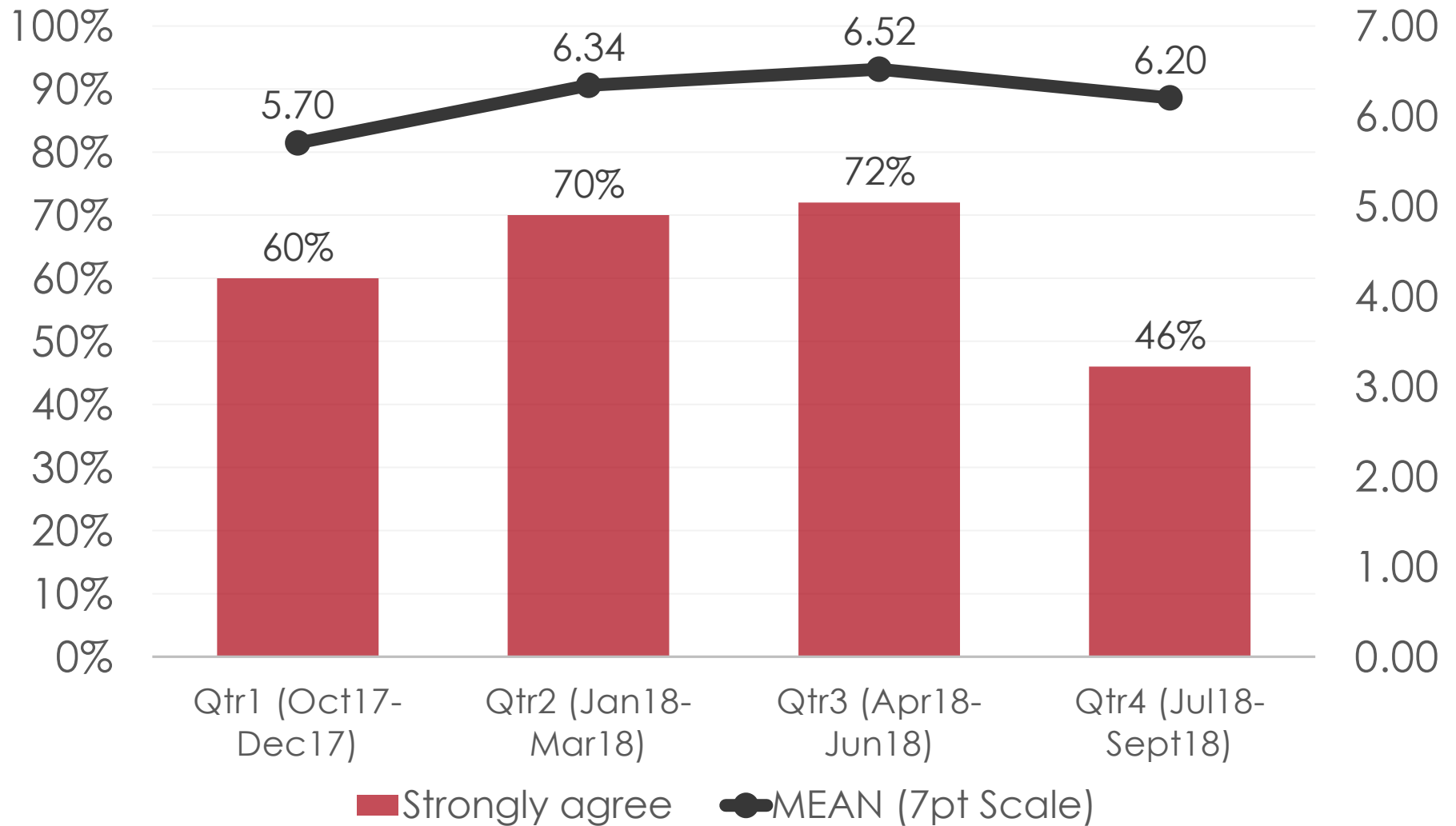
Not enough night time activities

Strongly agree MEAN (7pt Scale)

[A]

Tour guides were professional

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Strongly agree	33%	40%	30%	22%
MEAN (7pt Scale)	5.55	6.07	6.05	5.88

■ Strongly agree ● MEAN (7pt Scale)

[A]
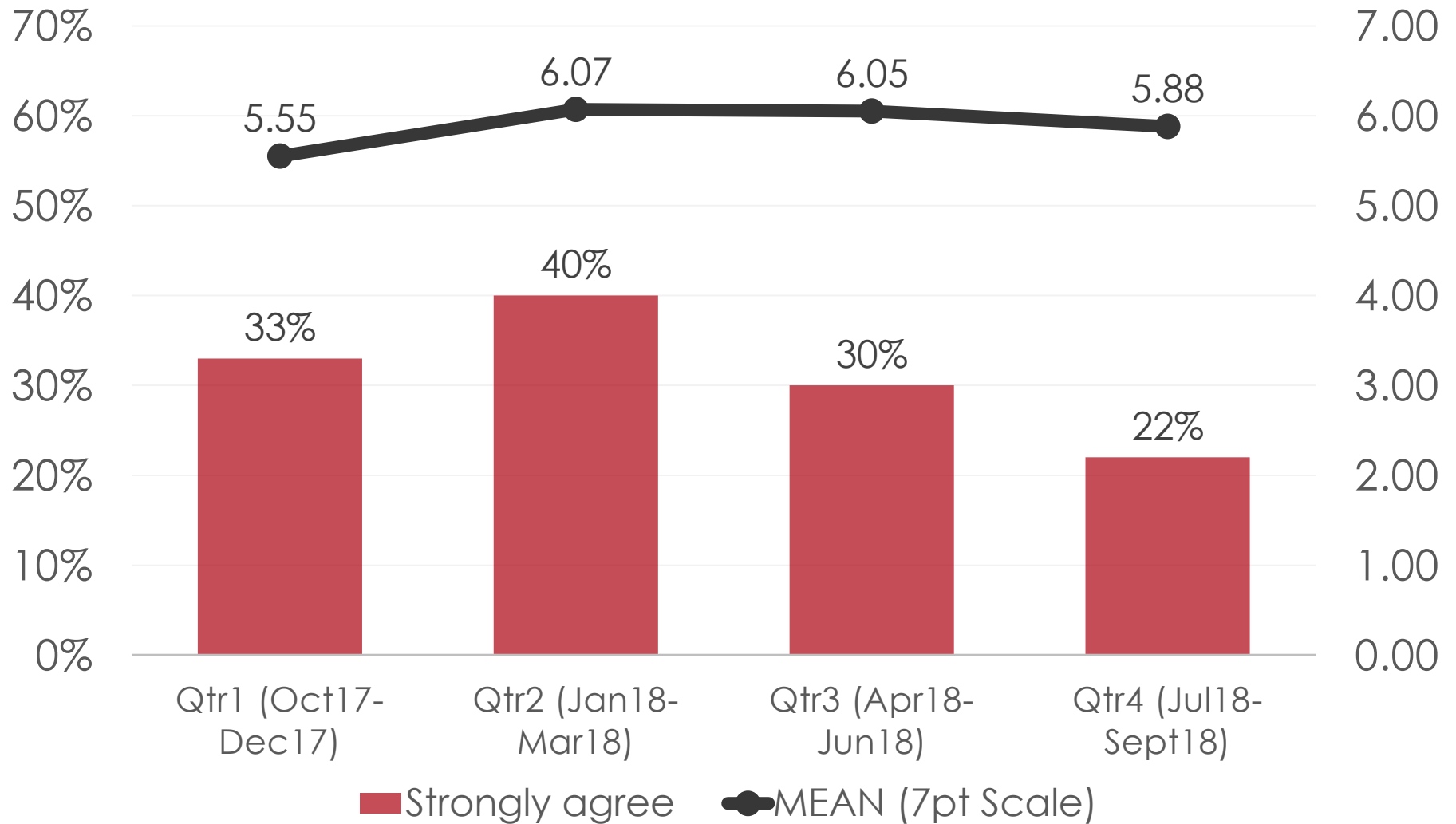
Tour drivers were professional

Taxi drivers were professional

Strongly agree

- Qtr1 (Oct17-Dec17): 47%
- Qtr2 (Jan18-Mar18): 39%
- Qtr3 (Apr18-Jun18): 23%
- Qtr4 (Jul18-Sept18): 27%

MEAN (7pt Scale)

- Qtr1 (Oct17-Dec17): 5.69
- Qtr2 (Jan18-Mar18): 5.98
- Qtr3 (Apr18-Jun18): 5.91
- Qtr4 (Jul18-Sept18): 5.96

[A]
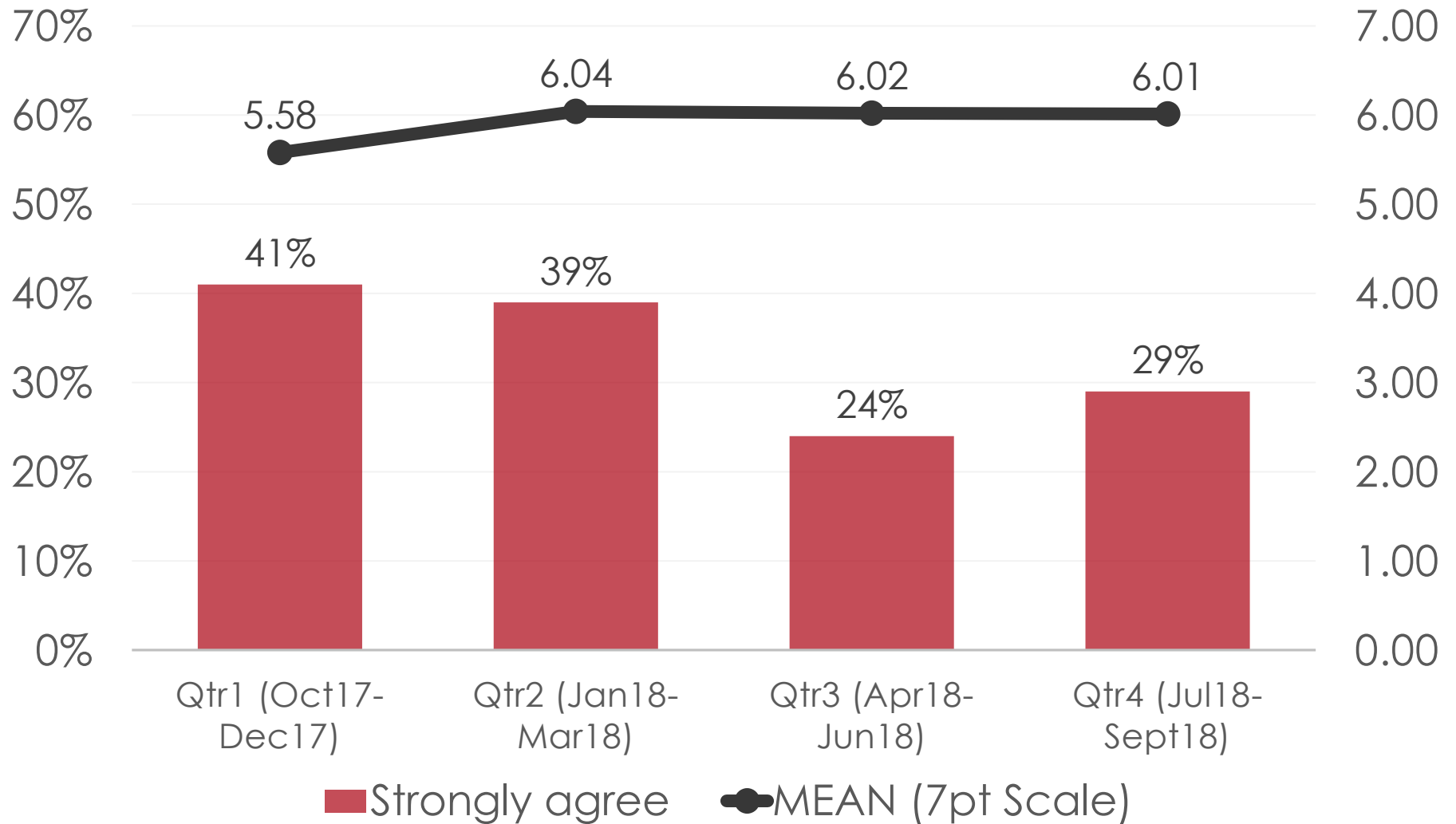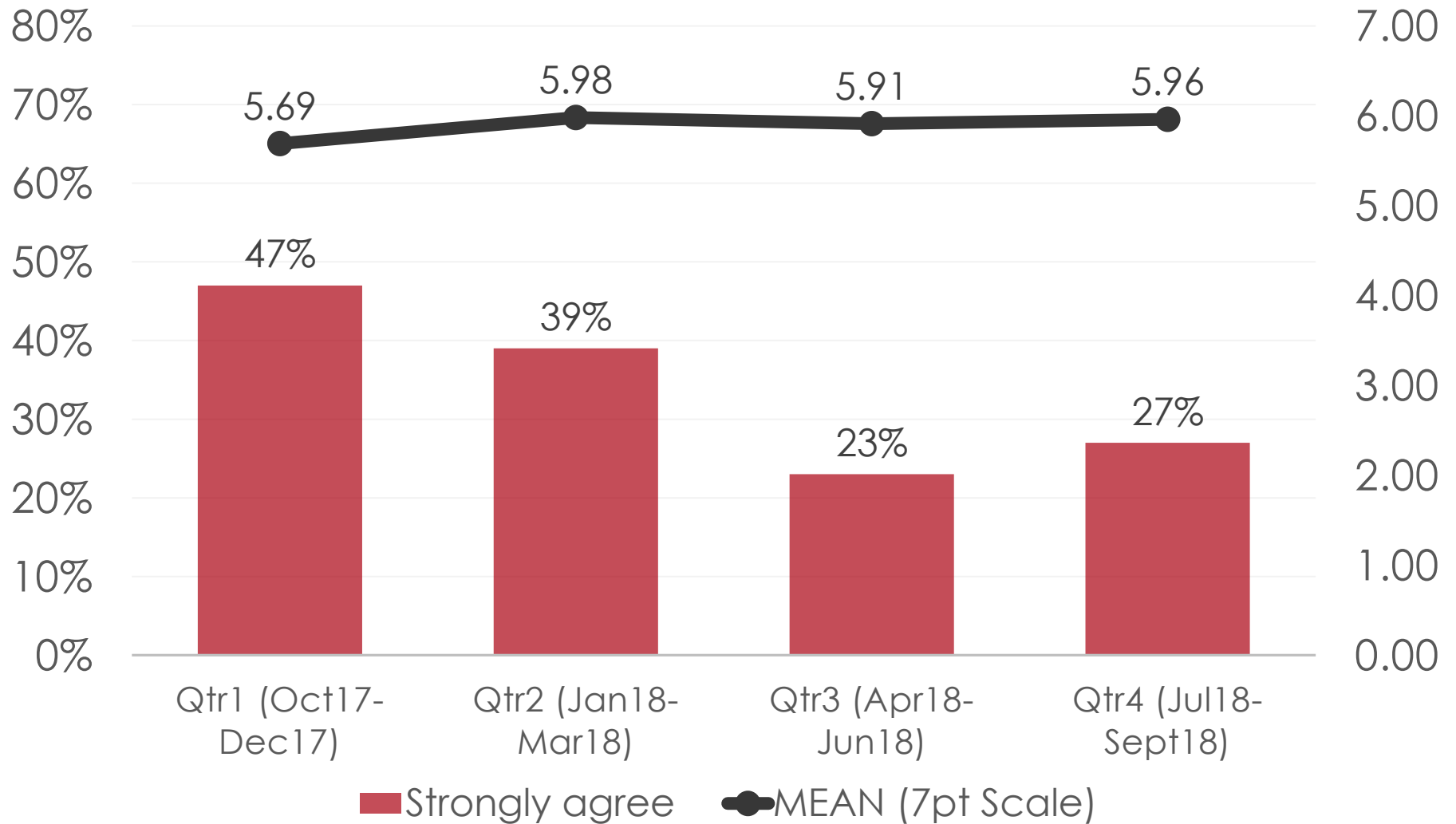
Taxis were clean

Guam airport was clean

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

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Strongly agree	46%	46%	34%	33%
MEAN (7pt Scale)	5.68	6.18	6.20	6.05

[A]
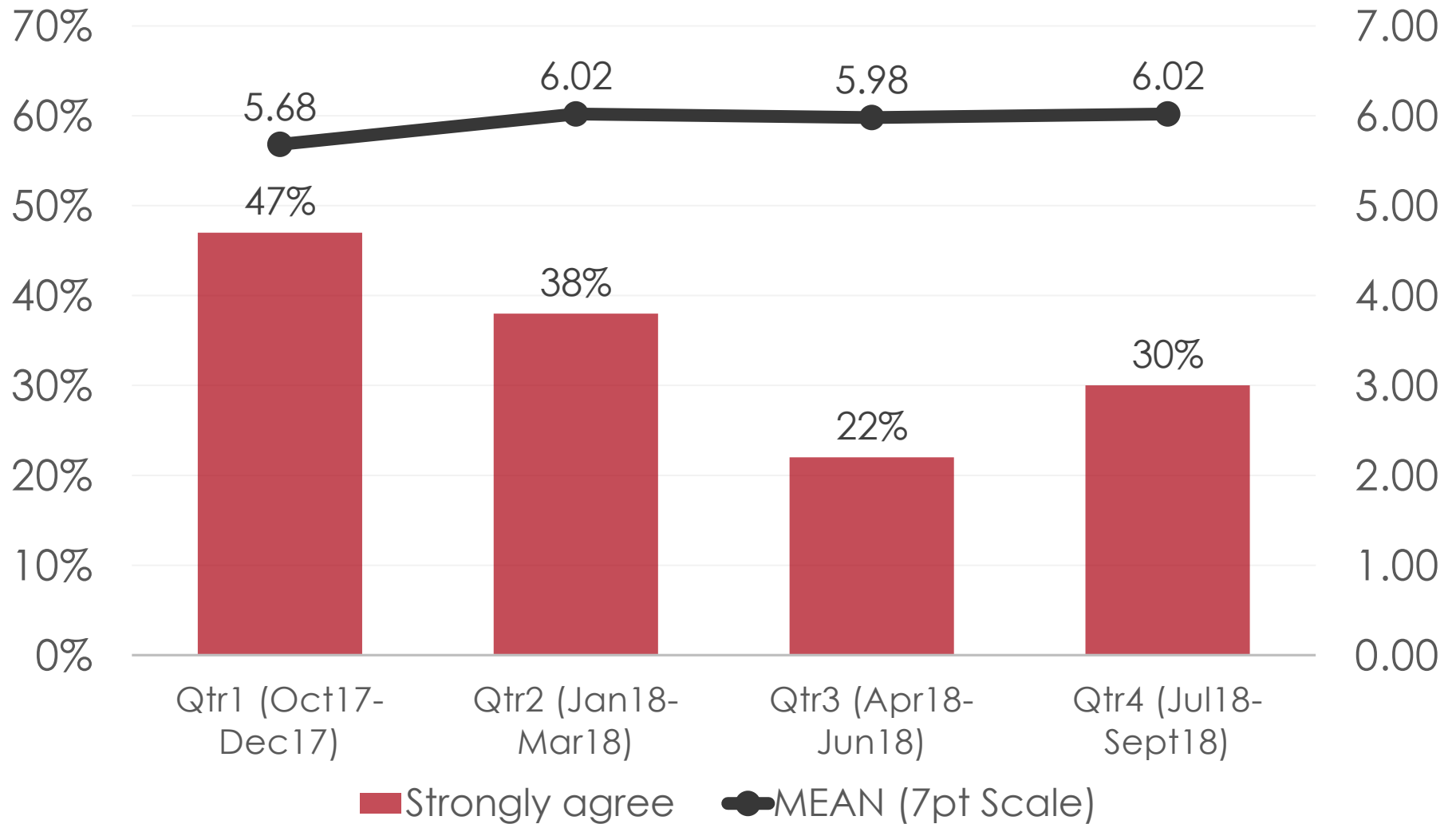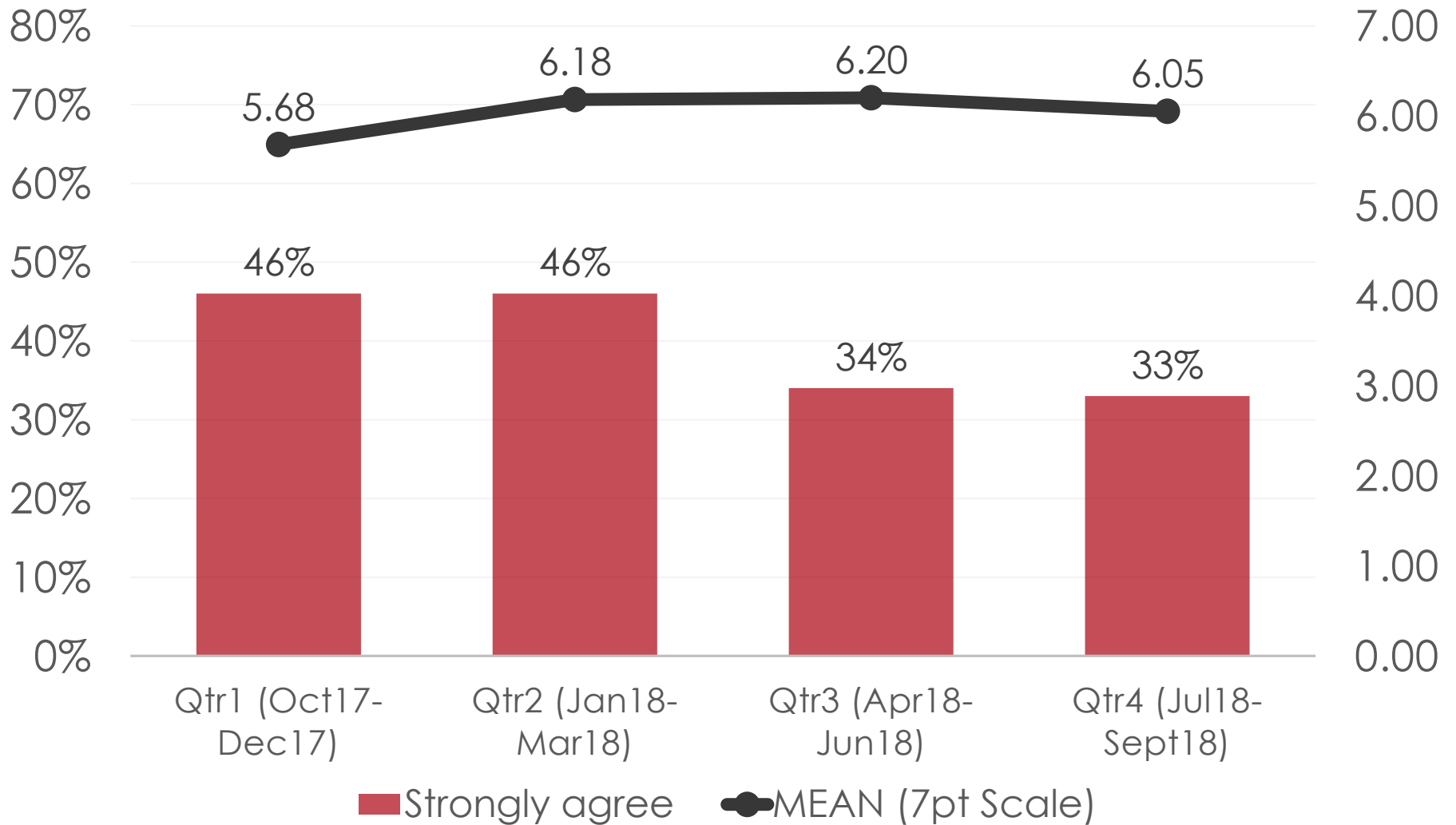
Ease of getting around
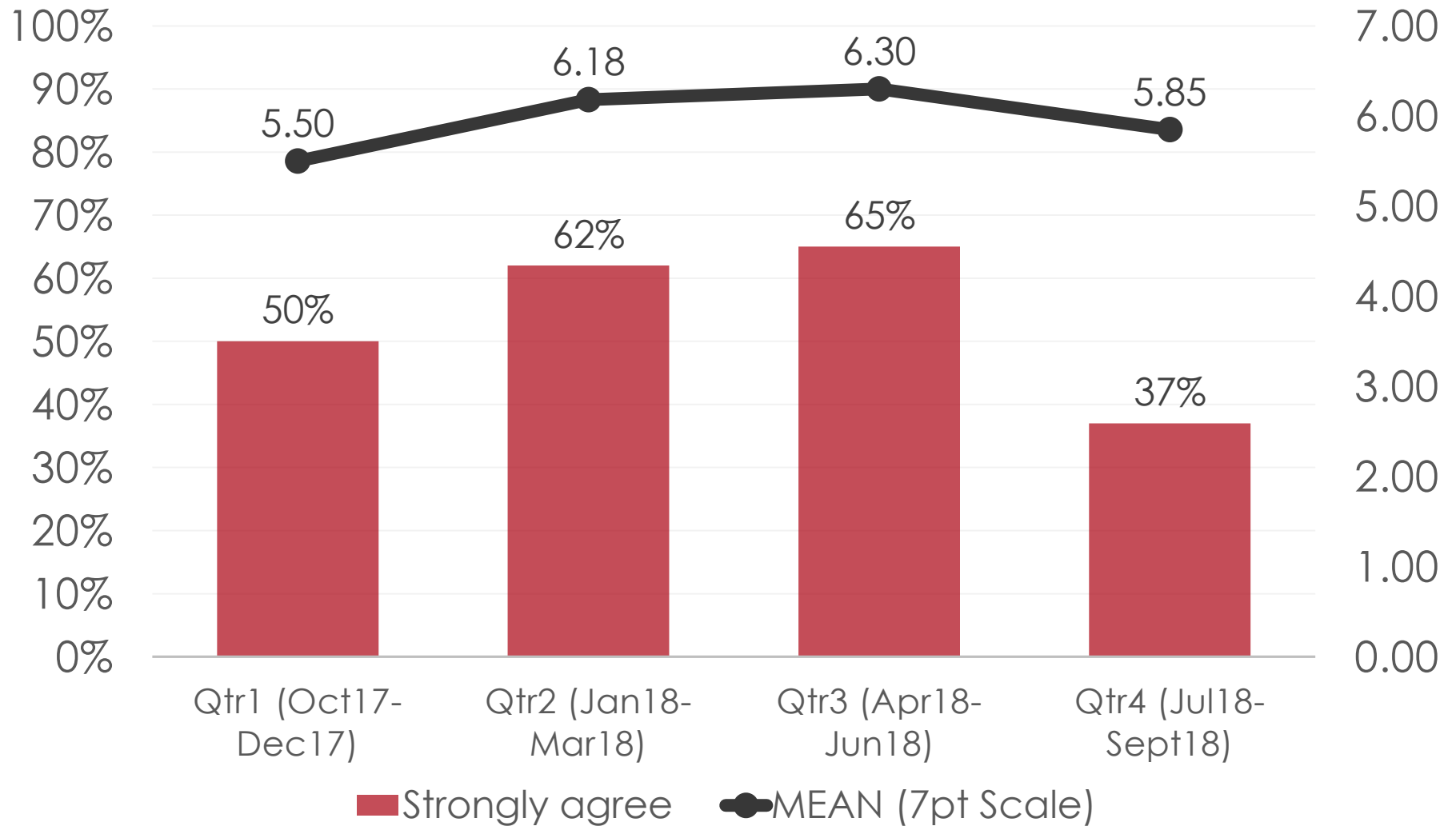
Safety walking around at night

Price of things on Guam

80%
70%
60%
50%
40%
30%
20%
10%
0%

7.00
6.00
5.00
4.00
3.00
2.00
1.00
0.00

5.16   5.44   5.76   5.46

29%   20%   19%   20%

Qtr1 (Oct17-Dec17)   Qtr2 (Jan18-Mar18)   Qtr3 (Apr18-Jun18)   Qtr4 (Jul18-Sept18)

■ Strongly agree   ●— MEAN (7pt Scale)

[A]
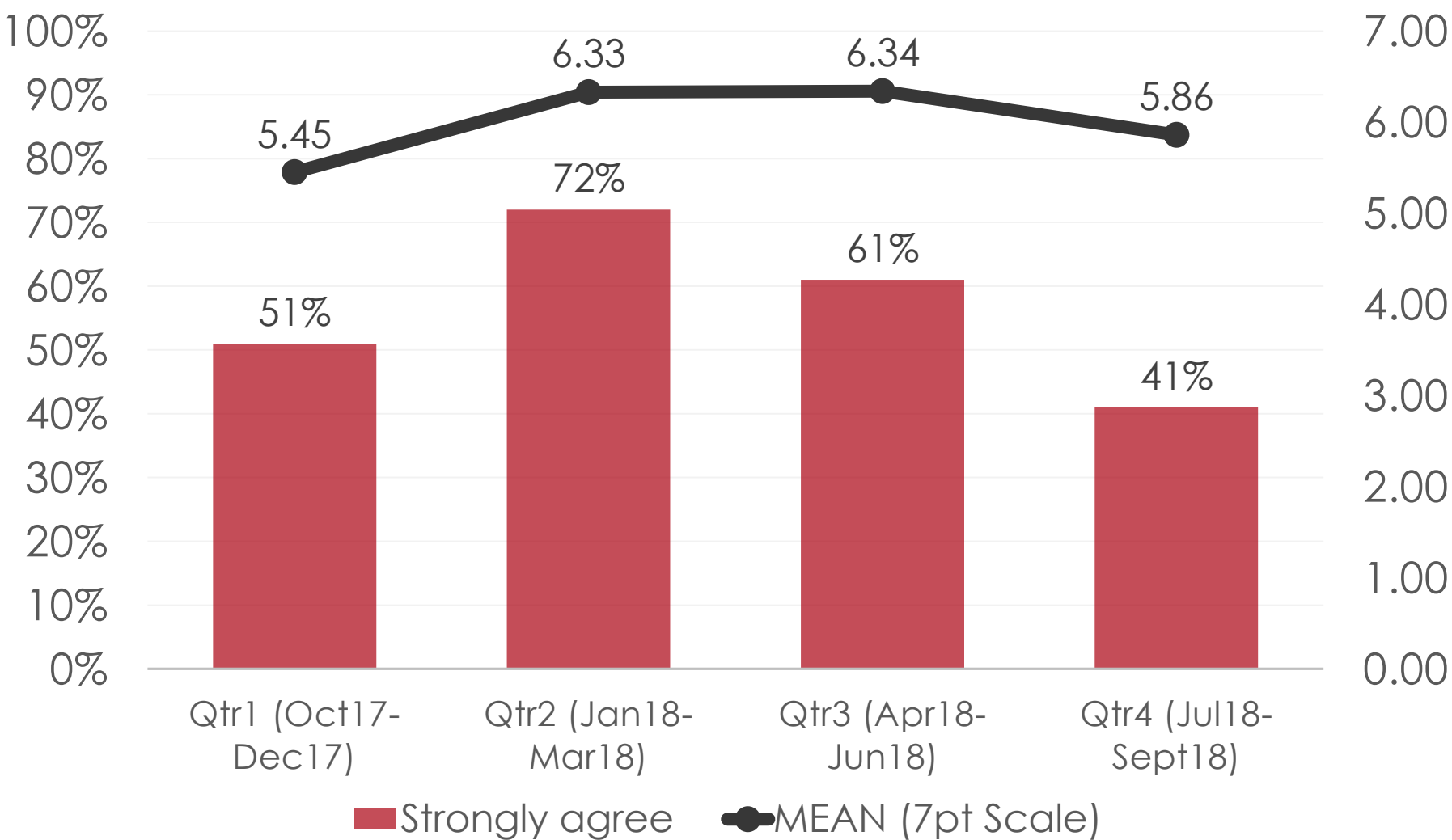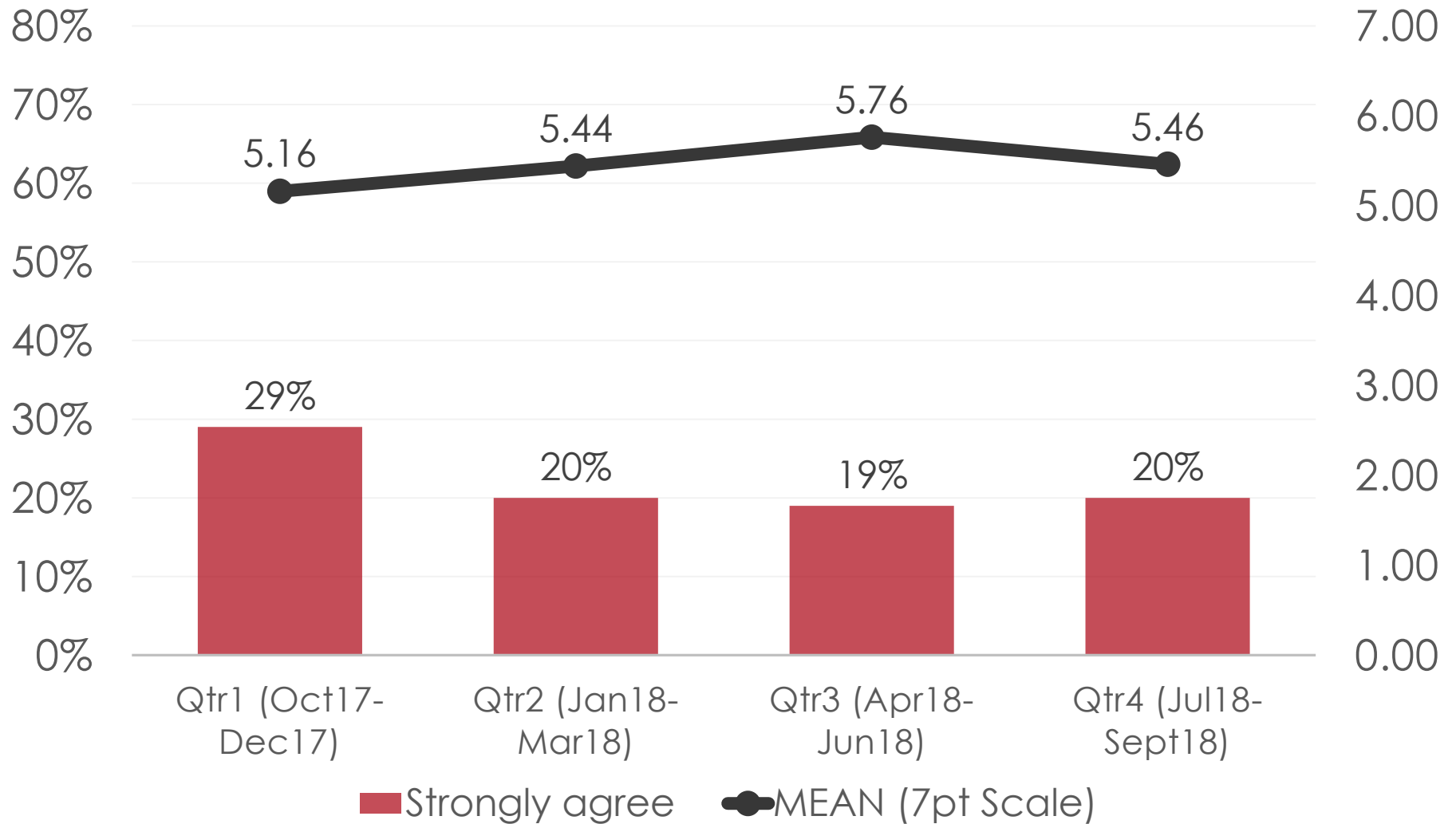
GENERAL SATISFACTION –
Quality/ Cleanliness

Category	Very Satisfied (Top Box)	MEAN (7pt Scale)
Beaches/ Parks	40%	5.94
Air/ Sky	43%	5.91
Parks	34%	5.85
Landscape Tumon	35%	5.85
Landscape Guam	34%	5.81
Ground Handler	28%	5.78
Transportation vehicle	30%	5.75

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

[A]
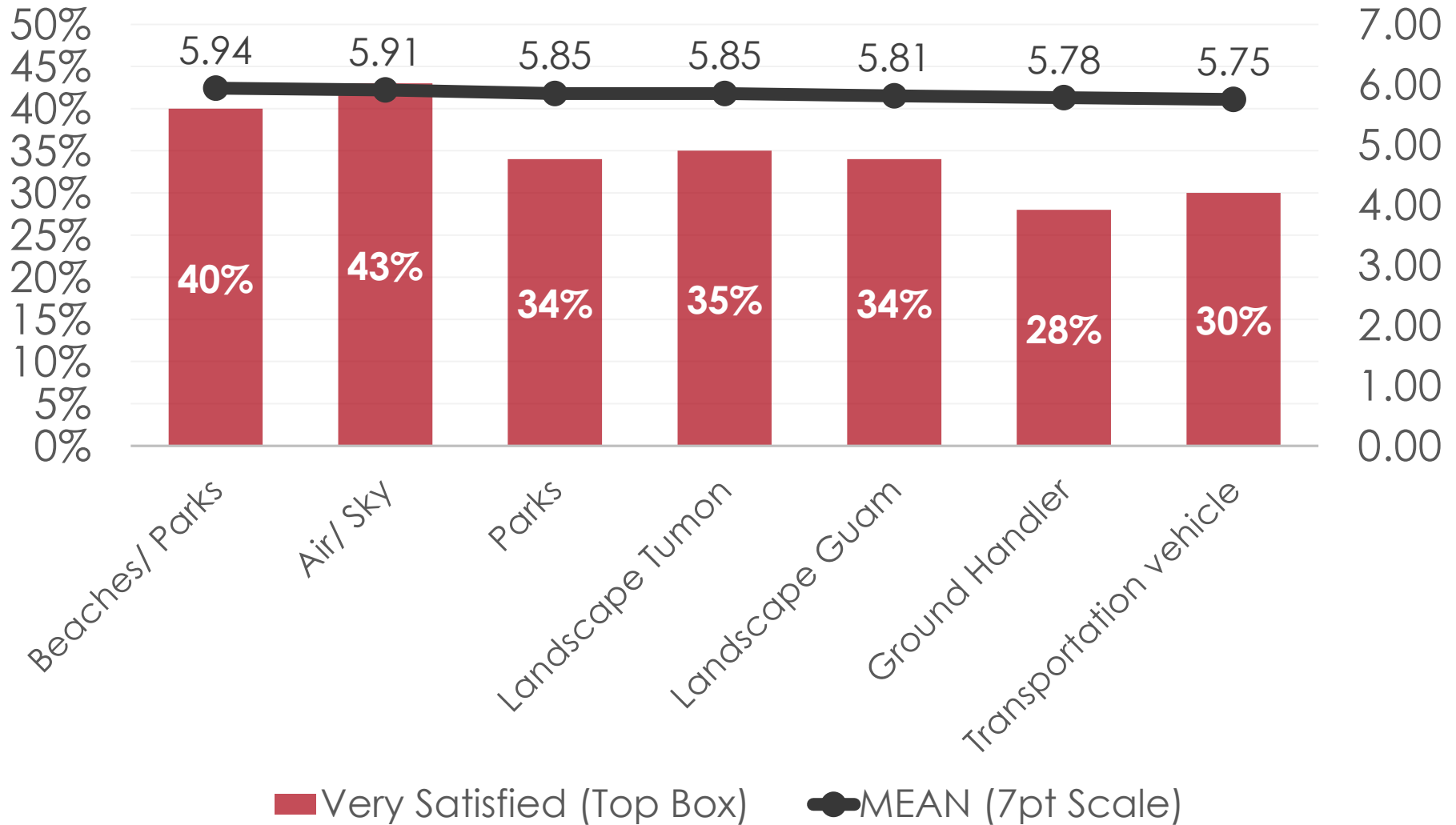
ACCOMMODATIONS –
OVERALL SATISFACTION

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

[A]
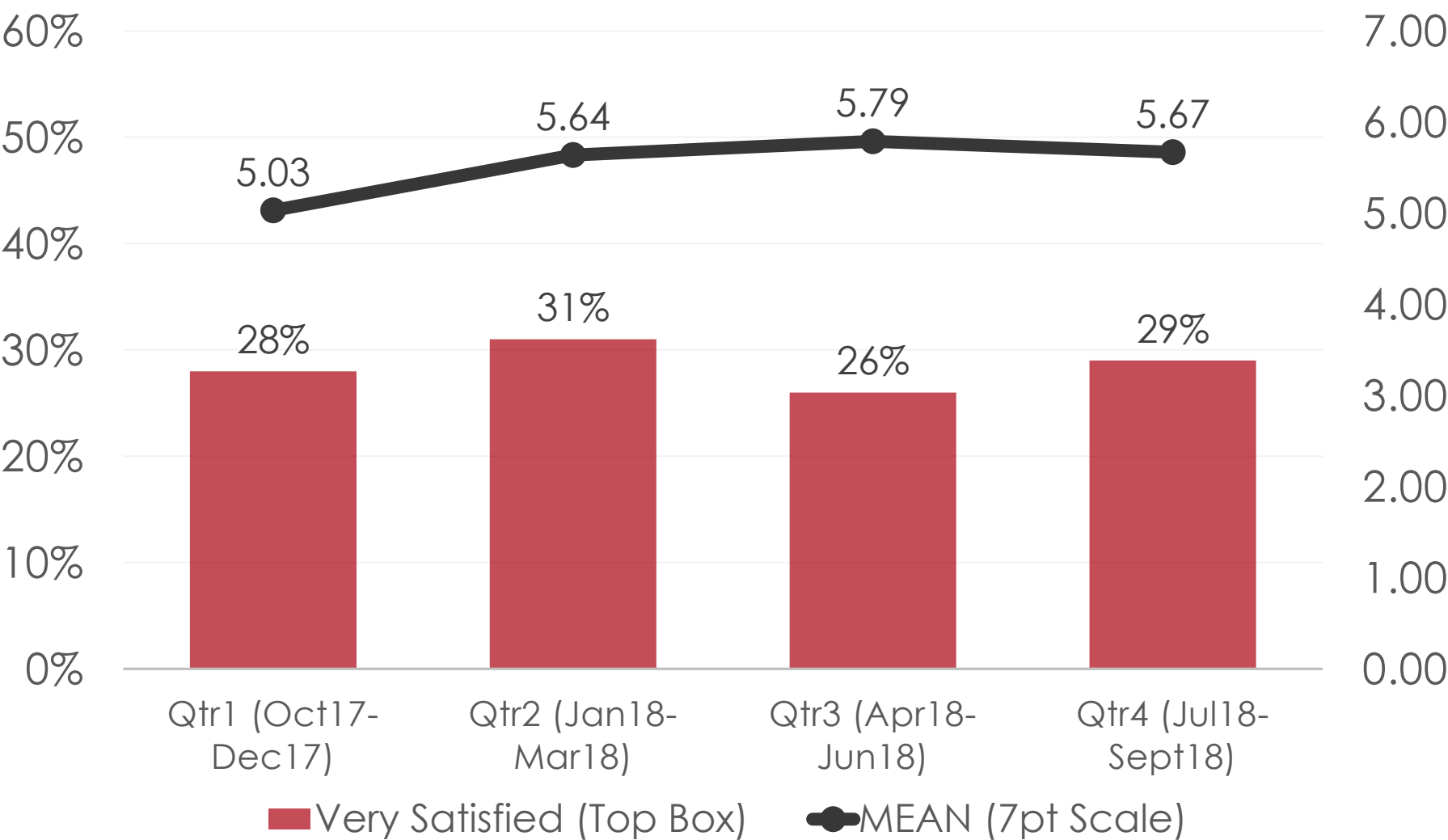
ACCOMMODATIONS –
Satisfaction by Category

Chart showing Satisfaction by Category with bars for "Very Satisfied (Top Box)" and a line for "MEAN (7pt Scale)":

Category	Very Satisfied (Top Box)	MEAN (7pt Scale)
Room	33%	5.42
View	26%	5.16
Furnishings	23%	5.10
Cleanliness	30%	5.24
Food- Quality	24%	5.10
Food- Quantity	29%	5.23
Staff	54%	5.72
Service	56%	5.74
Value	48%	5.68

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

[A]
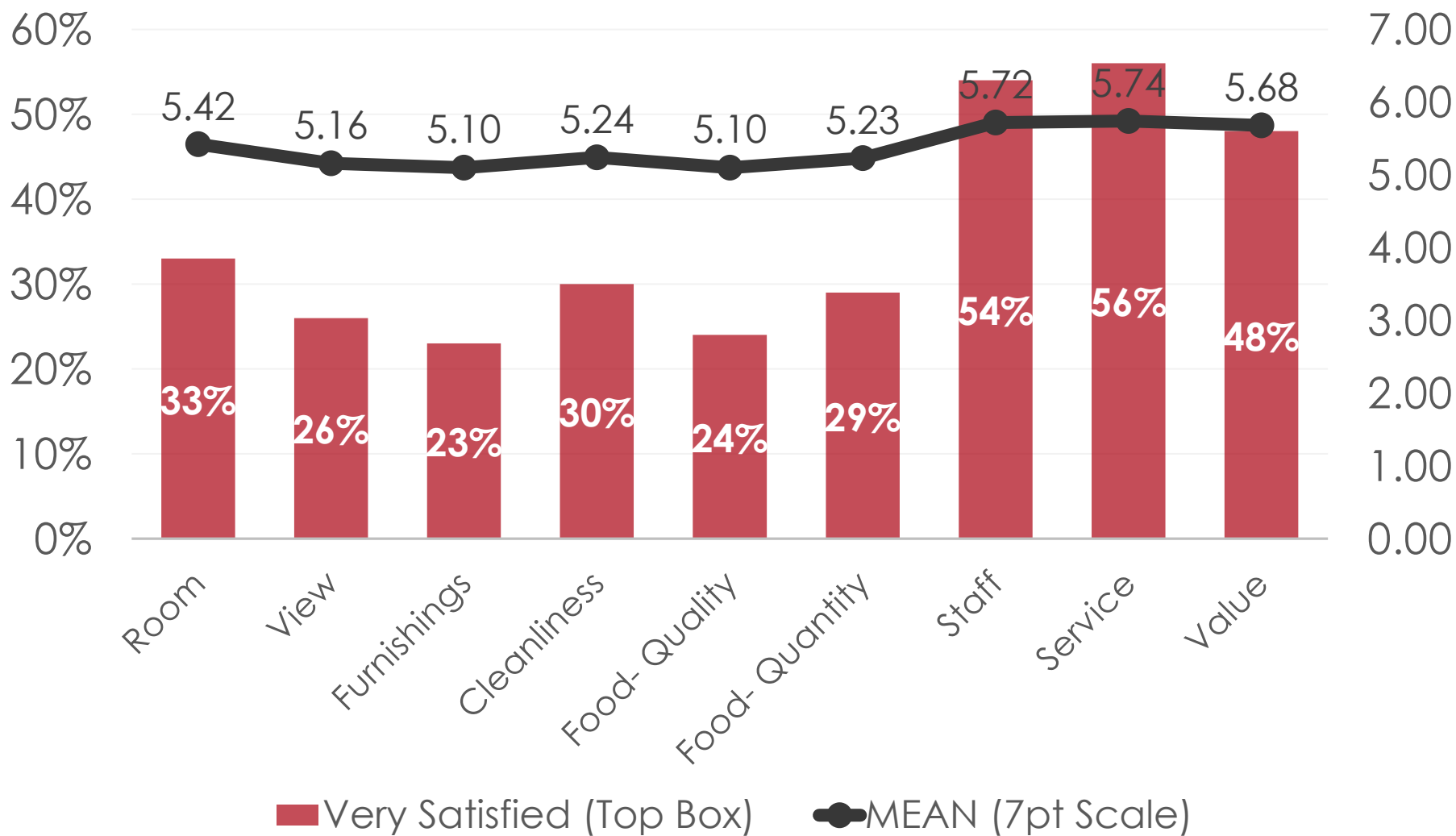
DINING EXPERIENCE (Outside Hotel) –
Satisfaction by Category

Furnishings: 26%, 5.38
Cleanliness: 36%, 5.42
Food- Quality: 38%, 5.61
Food- Quantity: 43%, 5.63
Staff: 49%, 5.78
Service: 55%, 5.85
Value: 39%, 5.45

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

[A]

Shopping Malls/ Stores (Top Responses)

Store	Percentage
Micro Mall	84%
Macys	79%
Ross	76%
Guam Premium Outlet	74%
ABC Store	60%
K-Mart	56%
DFS Galleria	44%
The Plaza	30%
Tumon Sands	19%
Agana SC	19%

[A]
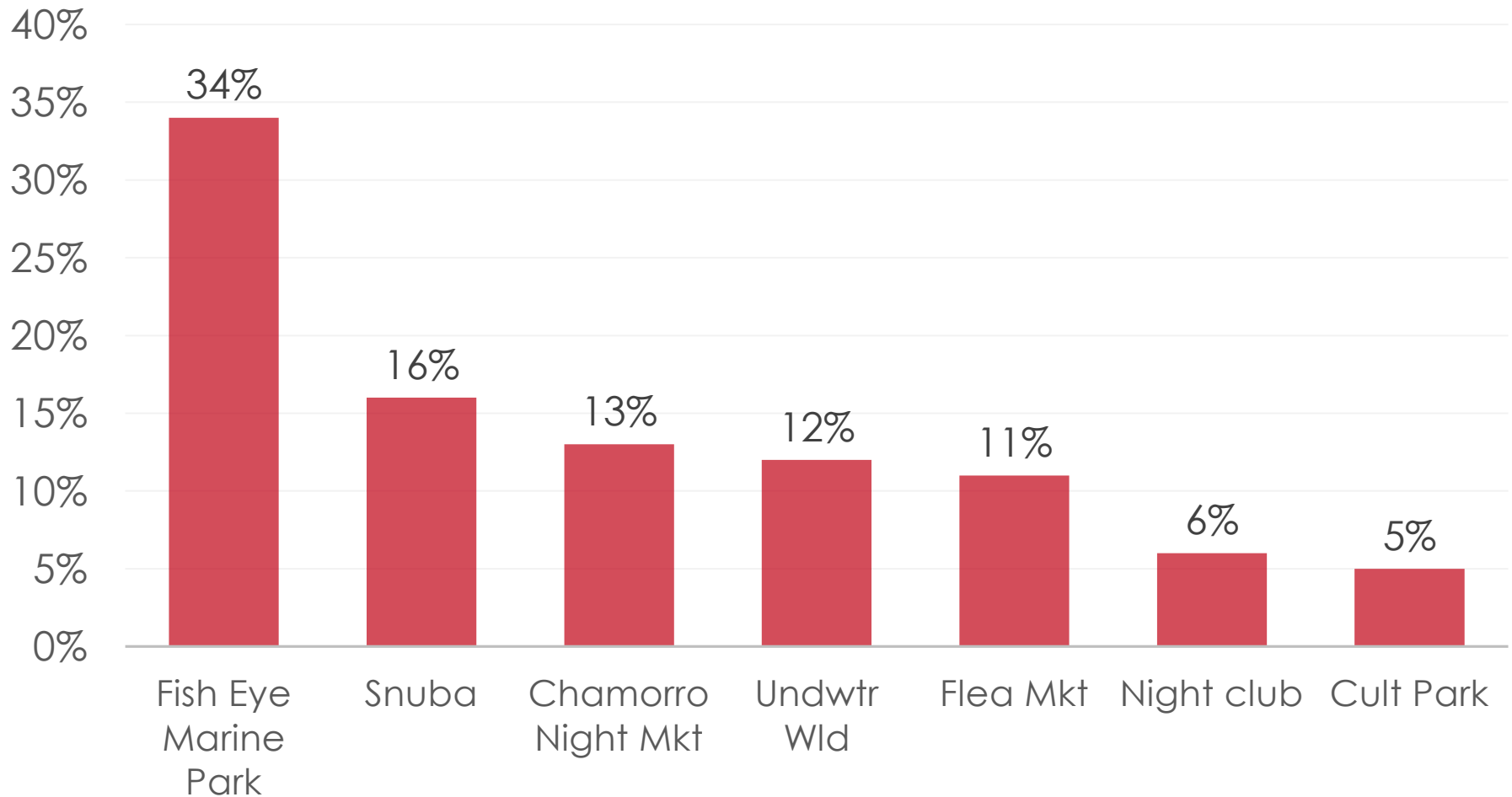
SHOPPING - SATISFACTION

[A]
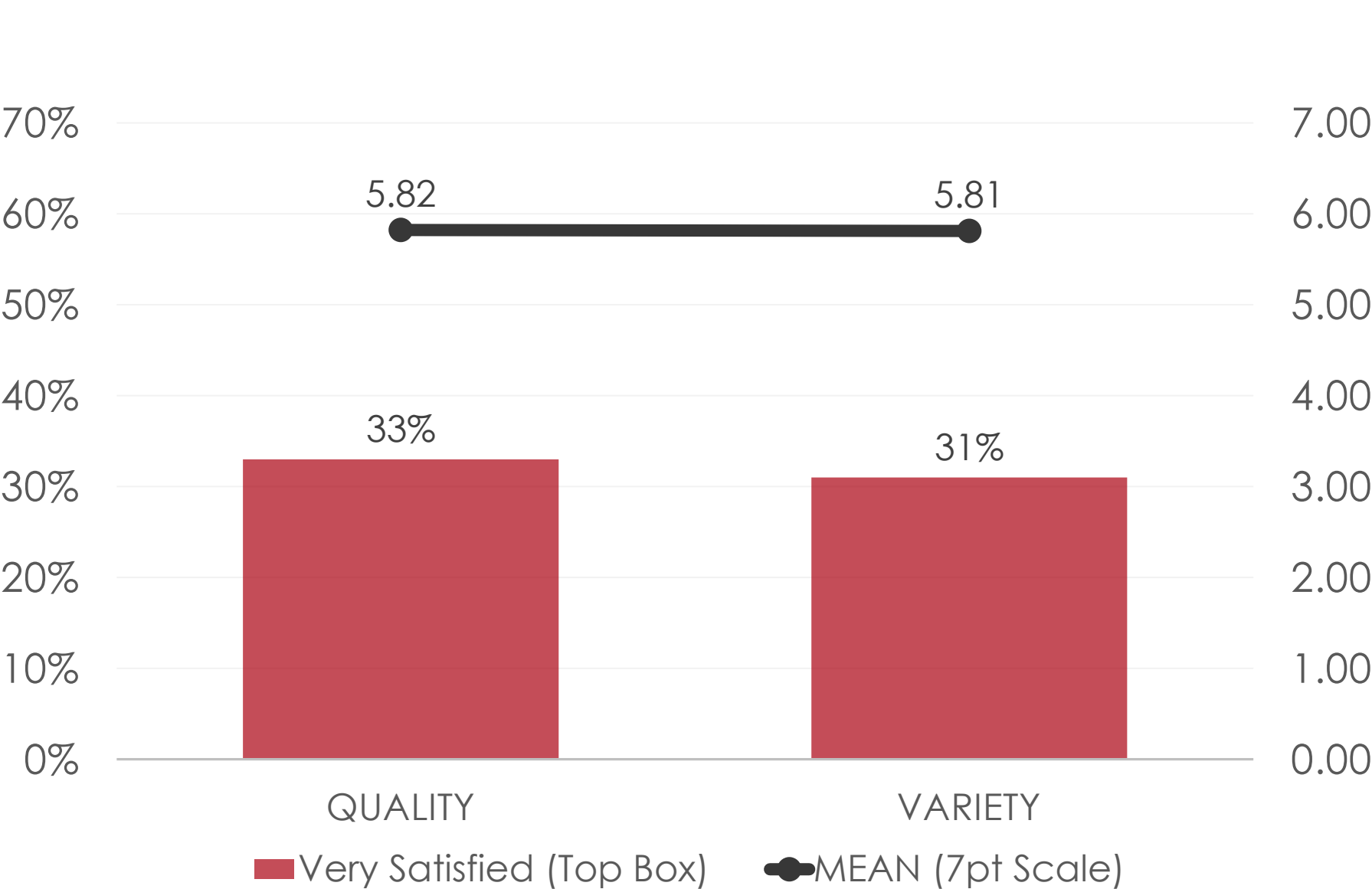
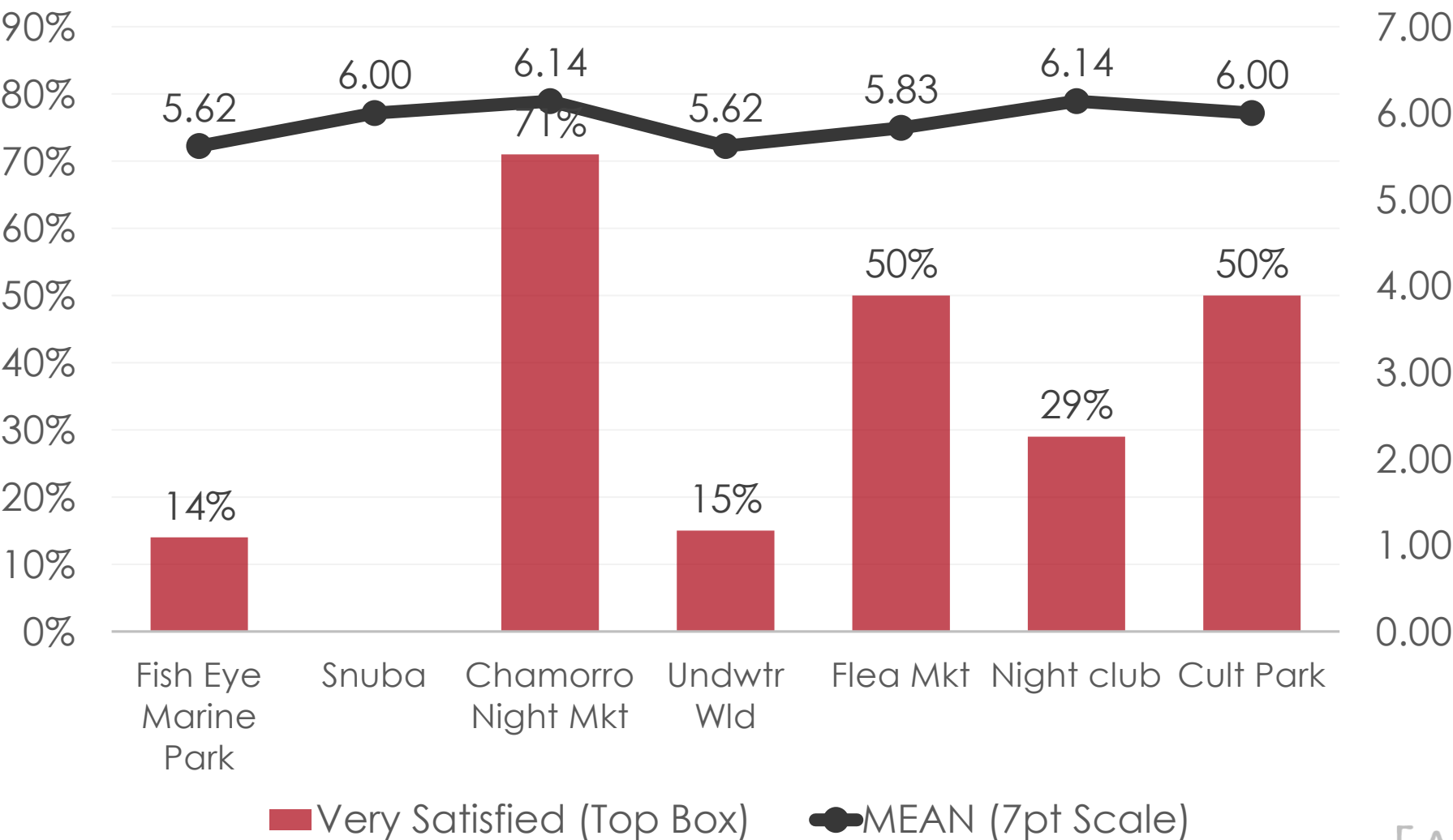# OPTIONAL TOUR PARTICIPATION – FY2018 Tracking

[A]
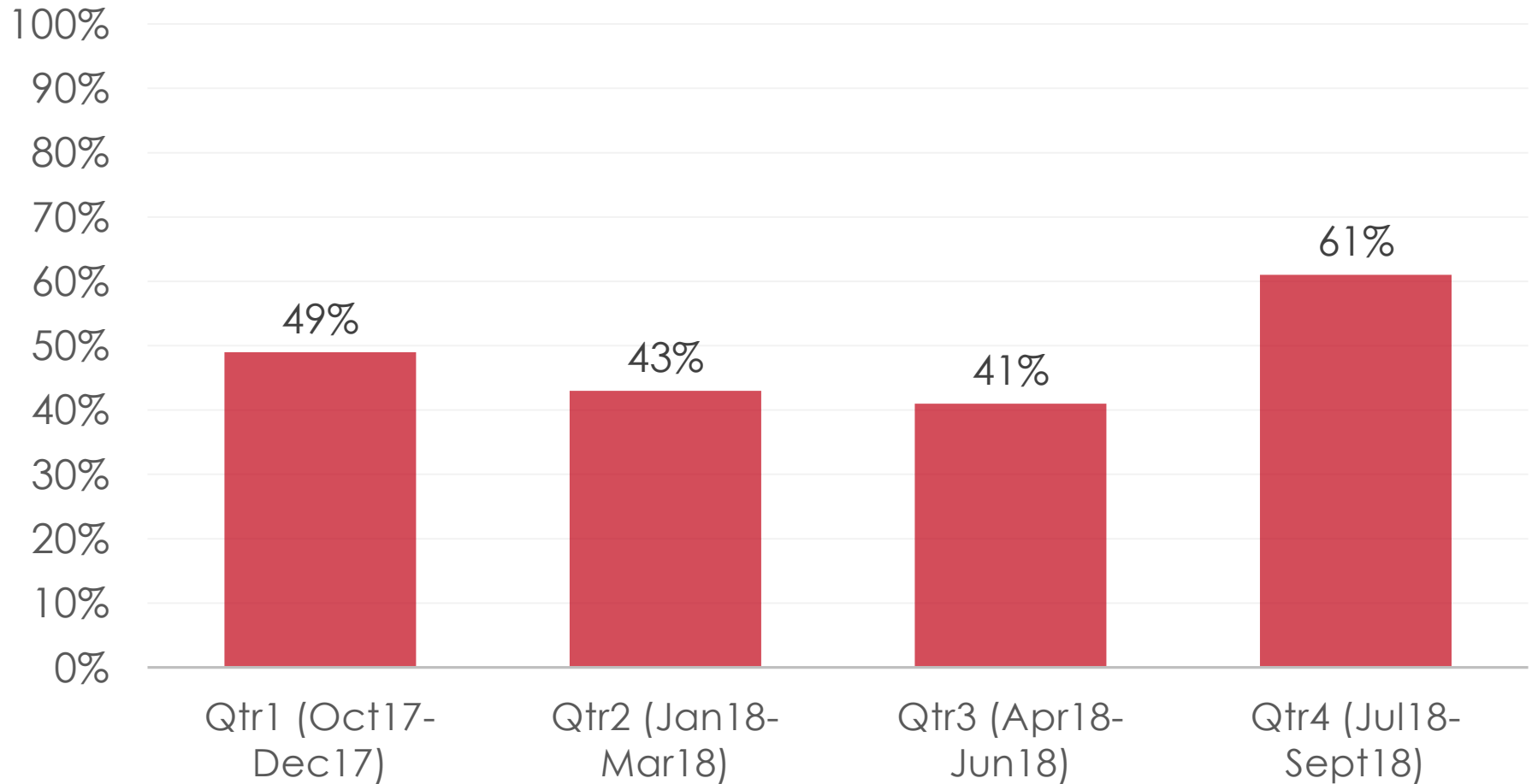
Optional Tour Participation (Top Responses/ 5%+)

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

Fish Eye Marine Park: 14%, 5.62
Snuba: 6.00
Chamorro Night Mkt: 71%, 6.14
Undwtr Wld: 15%, 5.62
Flea Mkt: 50%, 5.83
Night club: 29%, 6.14
Cult Park: 50%, 6.00

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

[A]

DAY TOUR - SATISFACTION

Chart showing Day Tour satisfaction:

- QUALITY: 5.71 (Mean), 28% (Very Satisfied Top Box)
- VARIETY: 5.61 (Mean), 27% (Very Satisfied Top Box)

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

NIGHT TOUR - SATISFACTION

5.57   5.56

22%   20%

QUALITY   VARIETY

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

[A]
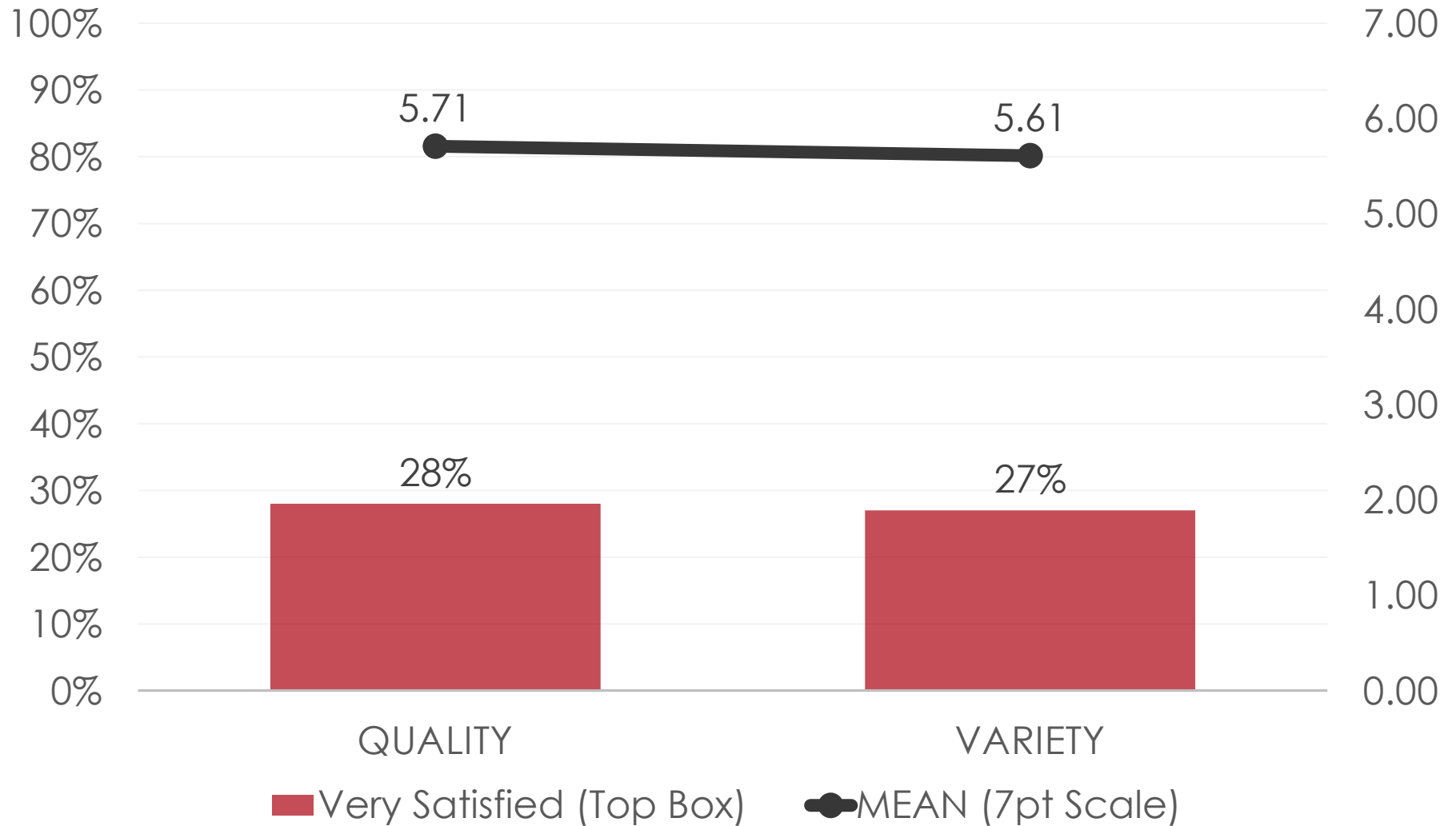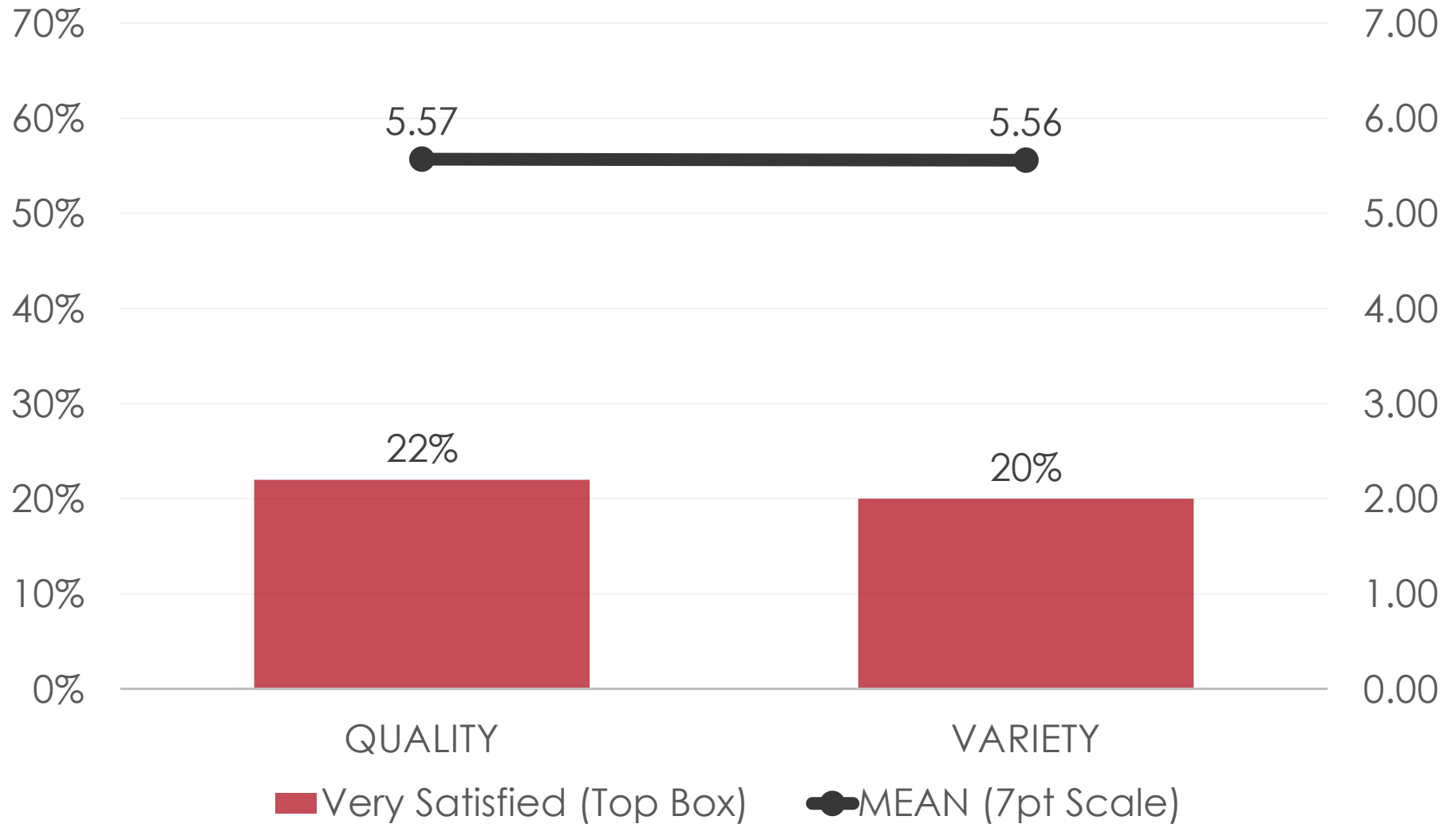
Activities Participation (Top Responses)

Activity	Percentage
Shopping	95%
Sightseeing	79%
Two-Lovers Pt	77%
Beach Resort	75%
Snorkle	26%
Water Park	14%
Arch site	11%
Dinner Show	10%
Scuba	5%
River/ Jungle…	5%

[A]
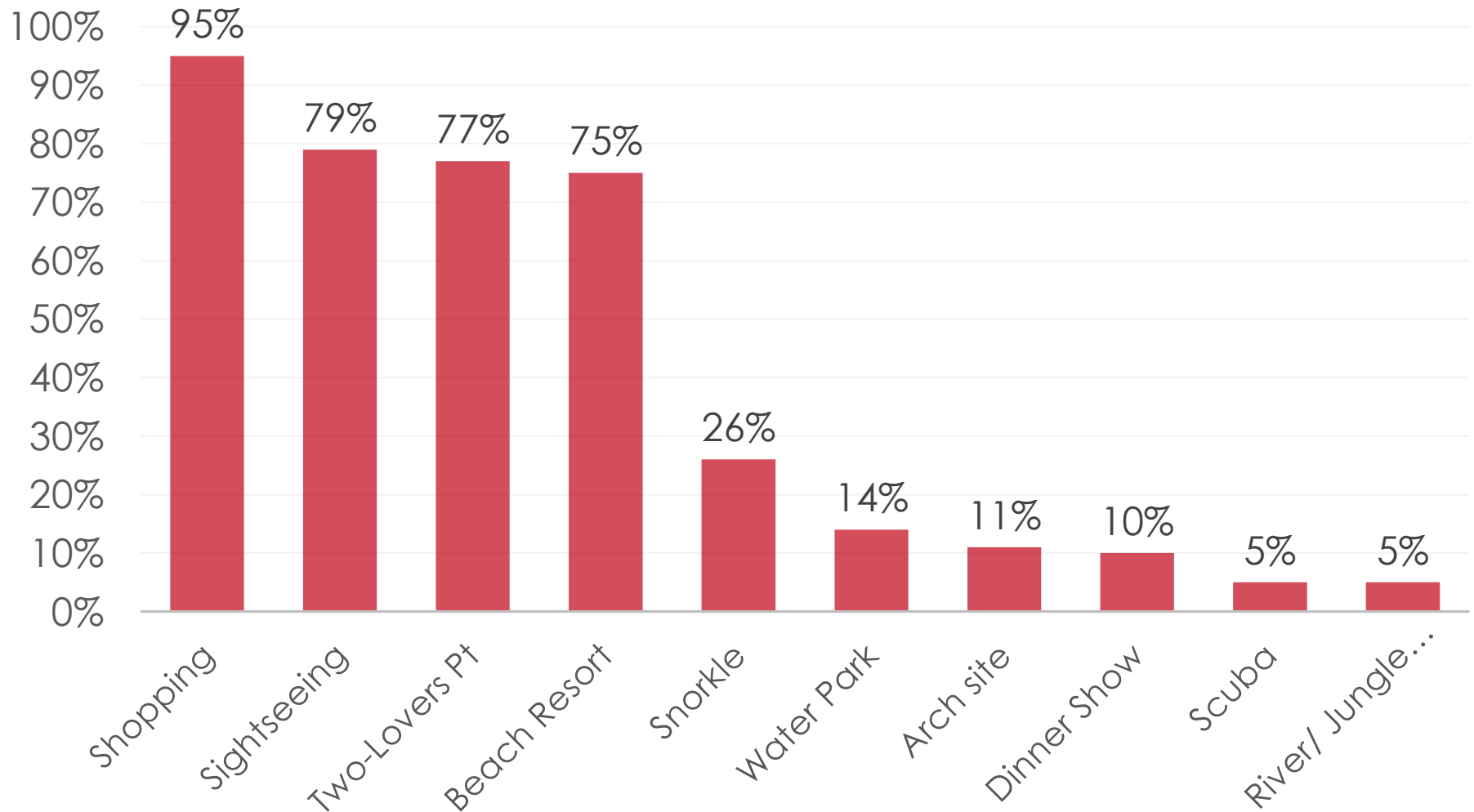
SECTION 5
PROMOTIONS

[A]

INTERNET- GUAM SOURCES OF INFORMATION

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Search engines	46%	54%	45%	51%
Social network	50%	48%	52%	59%
Blog/ Vlog	28%	18%	19%	20%
Forums	4%	2%	3%	6%
Q&A site	3%	2%	2%	5%

[A]
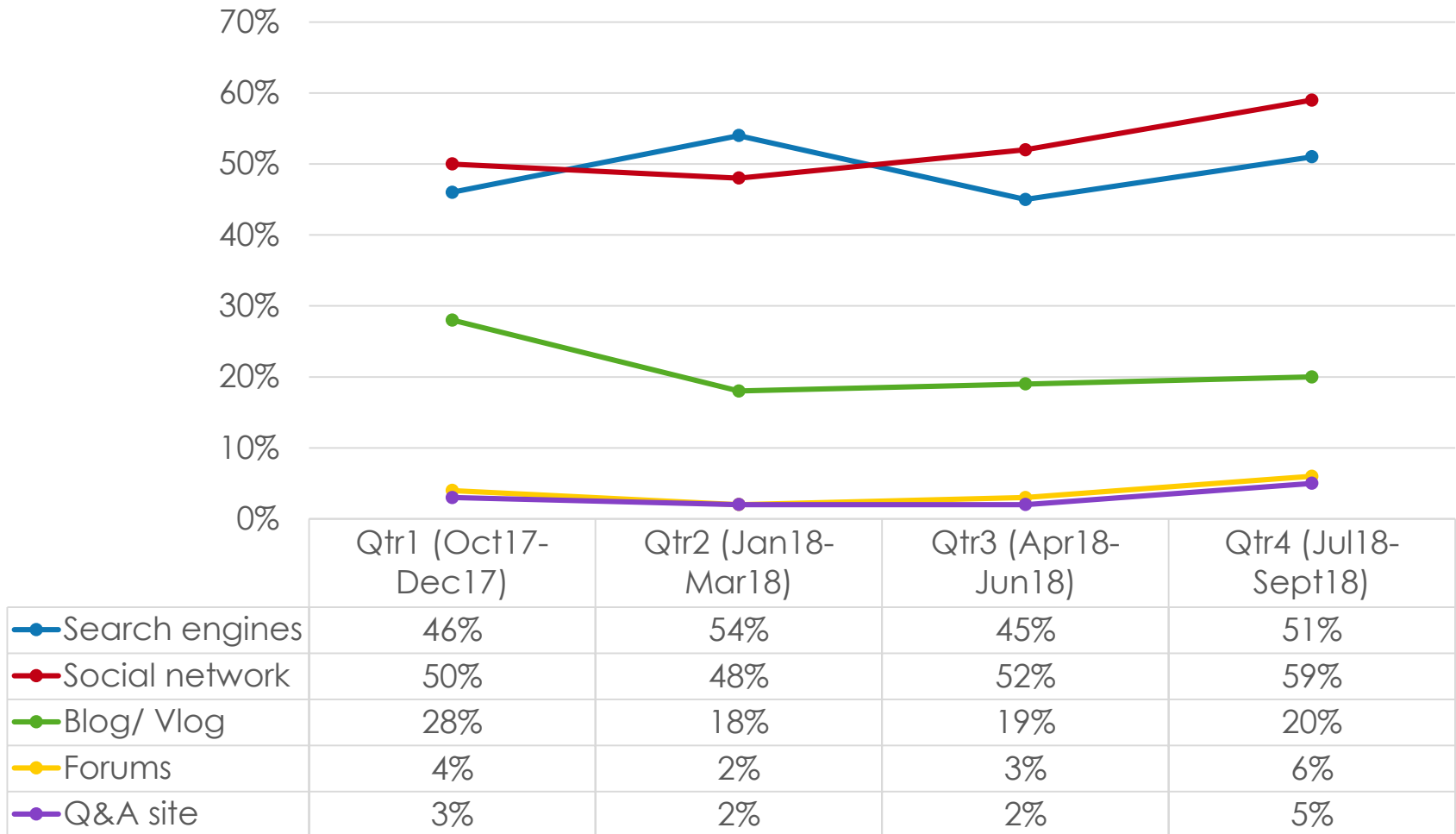
INTERNET- SOURCES OF INFORMATION
Things to do on Guam
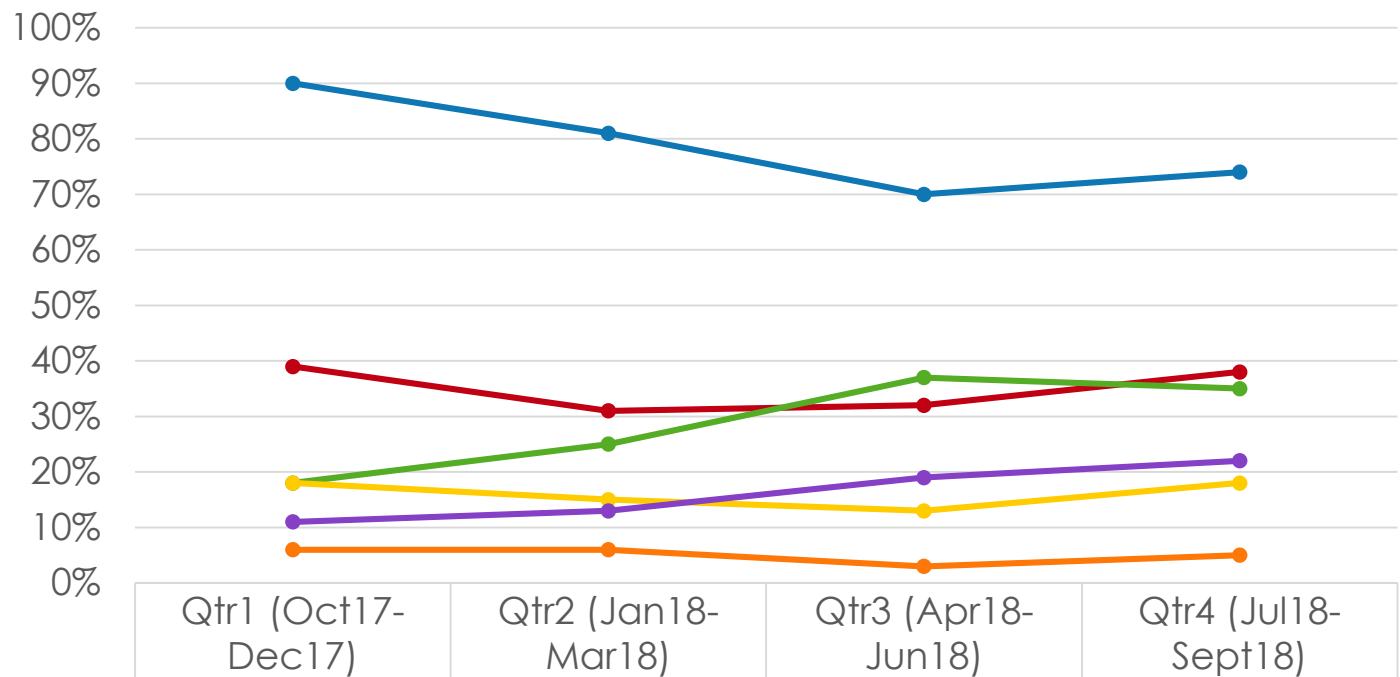
	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Google	90%	81%	70%	74%
Facebook	39%	31%	32%	38%
Instagram	18%	25%	37%	35%
Online booking site	18%	15%	13%	18%
Yahoo	11%	13%	19%	22%
Twitter	6%	6%	3%	5%

[A]

INTERNET- SOURCES OF INFORMATION GVB
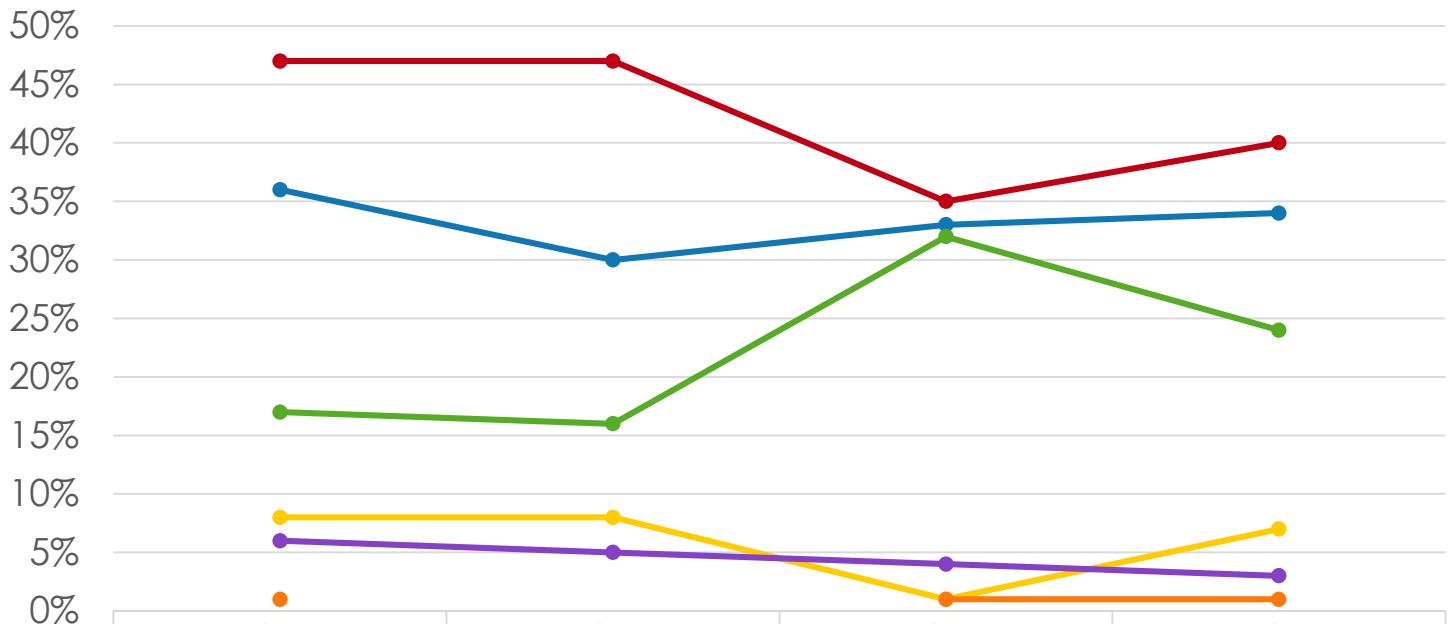
	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
None	36%	30%	33%	34%
GVB Website	47%	47%	35%	40%
GVB Facebook	17%	16%	32%	24%
GVB Instagram	8%	8%	1%	7%
GVB Twitter	6%	5%	4%	3%
GVB Café	1%		1%	1%

TRAVEL MOTIVATION
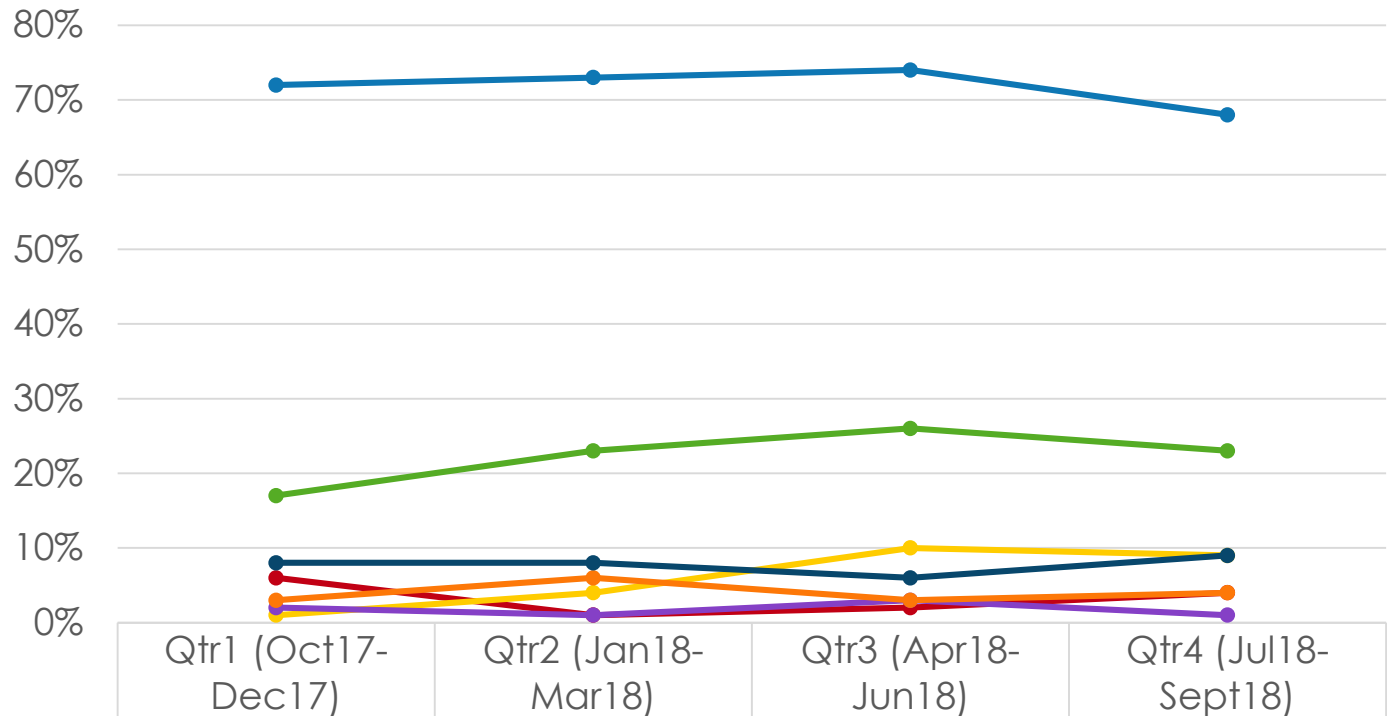
	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Friends/ Family	72%	73%	74%	68%
Company/ Bus Trip	6%	1%	2%	4%
Internet	17%	23%	26%	23%
Travel Show	1%	4%	10%	9%
Travel Agent	2%	1%	3%	1%
Print	3%	6%	3%	4%
Social Media	8%	8%	6%	9%

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PRE-ARRIVAL SOURCES OF INFORMATION

Bar chart data:

Source	Percentage
Internet	90%
Friends/ Family	71%
Prior trip	18%
TV	15%
Magazine	14%
Trvl Ag Brochure	9%
Guidebook	5%
Company	5%
GVB Promo	5%
Cons Trvl Show	4%
GVB	3%
Newspaper	1%

[A]
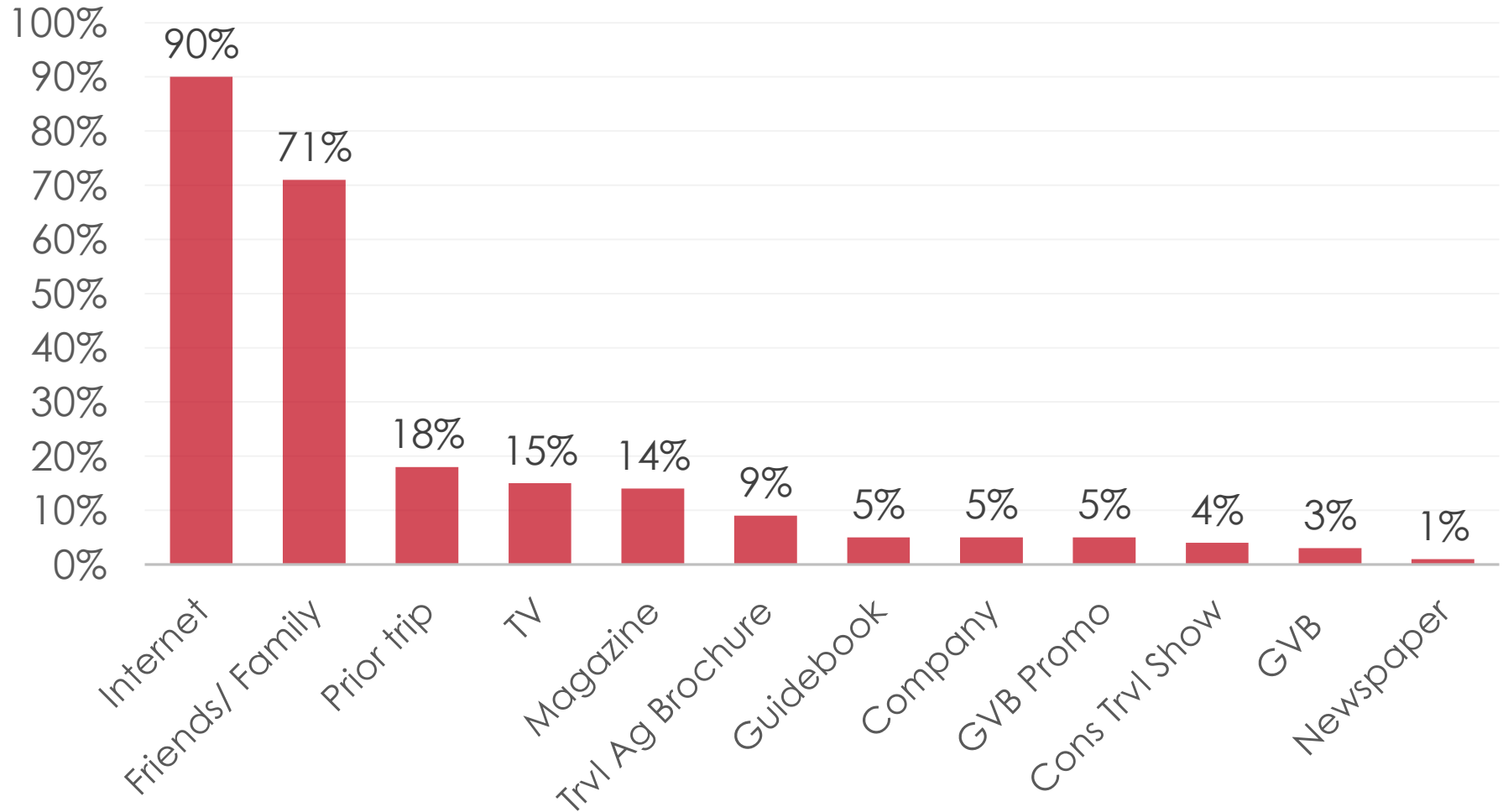
PRE-ARRIVAL
SOURCES OF INFORMATION –
Key Segments
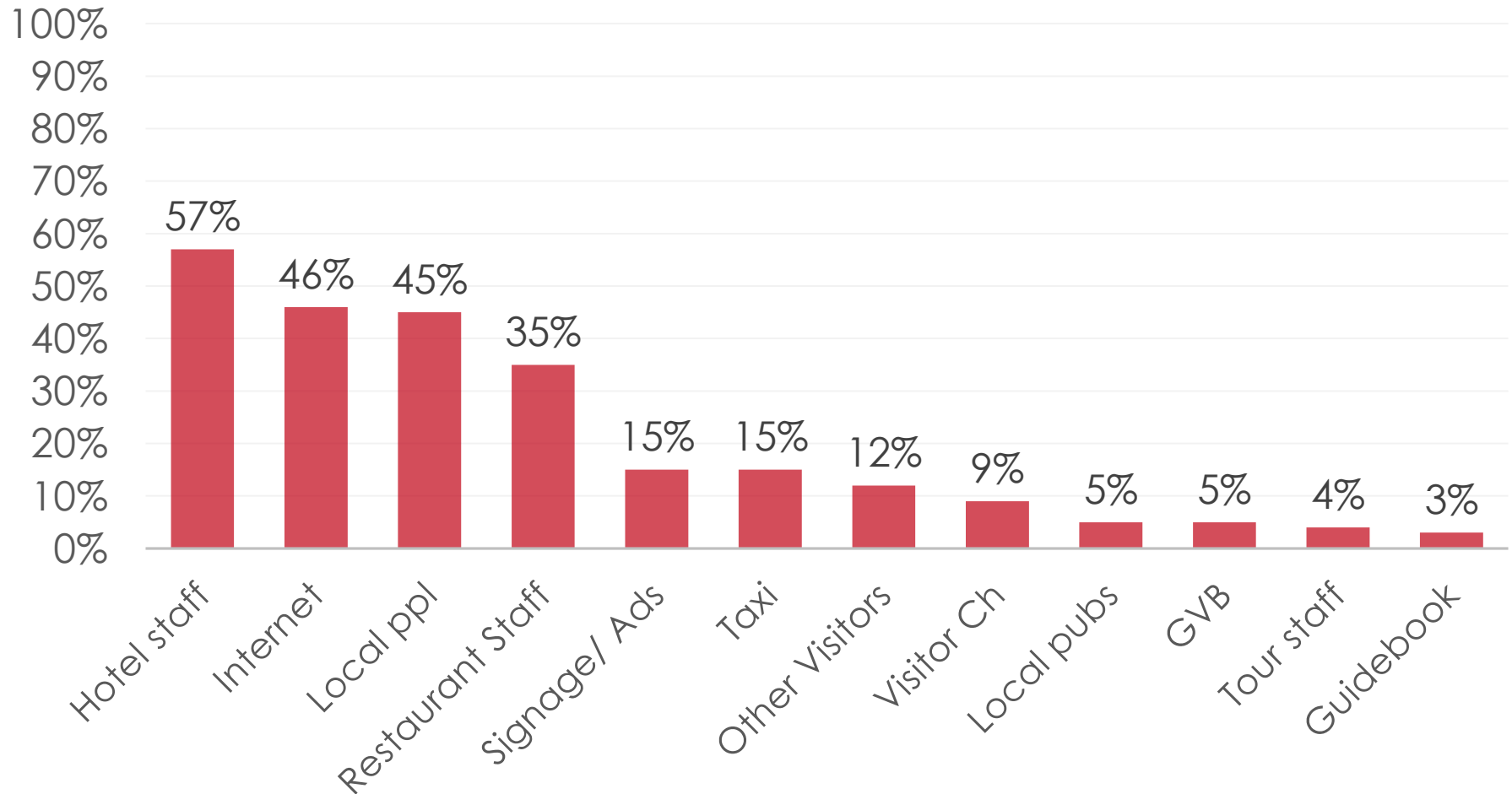
GVB EXIT SURVEY

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

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q1	Internet/Mobile App	90%	100%	92%	91%	91%
	Friend or relative	71%	100%	69%	71%	75%
	I have been to Guam before	18%		18%	19%	16%
	TV	15%		18%	15%	18%
	Magazine (consumer)	14%		15%	12%	5%
	Travel agent brochure	9%		11%	7%	14%
	Travel guide book at bookstores	5%	50%	3%	5%	2%
	Guam Visitors Bureau promotional activities	5%	50%	4%	6%	5%
	Co-worker/ company travel department	5%		4%	2%	5%
	Consumer travel shows	4%		3%	4%	2%
	Guam Visitors Bureau office	3%		2%	2%	2%
	Newspaper	1%		1%		
	Total	110	2	89	97	44

Prepared by Anthology Research

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ONISLE
SOURCES OF INFORMATION

Chart showing sources of information:
- Hotel staff: 57%
- Internet: 46%
- Local ppl: 45%
- Restaurant Staff: 35%
- Signage/ Ads: 15%
- Taxi: 15%
- Other Visitors: 12%
- Visitor Ch: 9%
- Local pubs: 5%
- GVB: 5%
- Tour staff: 4%
- Guidebook: 3%

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ON-ISLE
SOURCES OF INFORMATION –
Key Segments

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

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q2	Hotel staff	57%	100%	62%	59%	66%
	Internet/Mobile App	46%		47%	46%	41%
	Local people	45%	50%	46%	43%	43%
	Restaurant staff (outside hotel)	35%		36%	38%	32%
	Signs/ advertisement	15%	50%	16%	12%	11%
	Taxi drivers	15%		17%	15%	20%
	Other visitors	12%	50%	10%	12%	9%
	Visitors channel	9%	50%	9%	6%	14%
	Local publication	5%		6%	5%	2%
	Guam Visitors Bureau	5%		4%	2%	7%
	Tour staff	4%		4%	2%	2%
	Guide books I brought with me	3%		2%	2%	5%
	Total	110	2	89	97	44

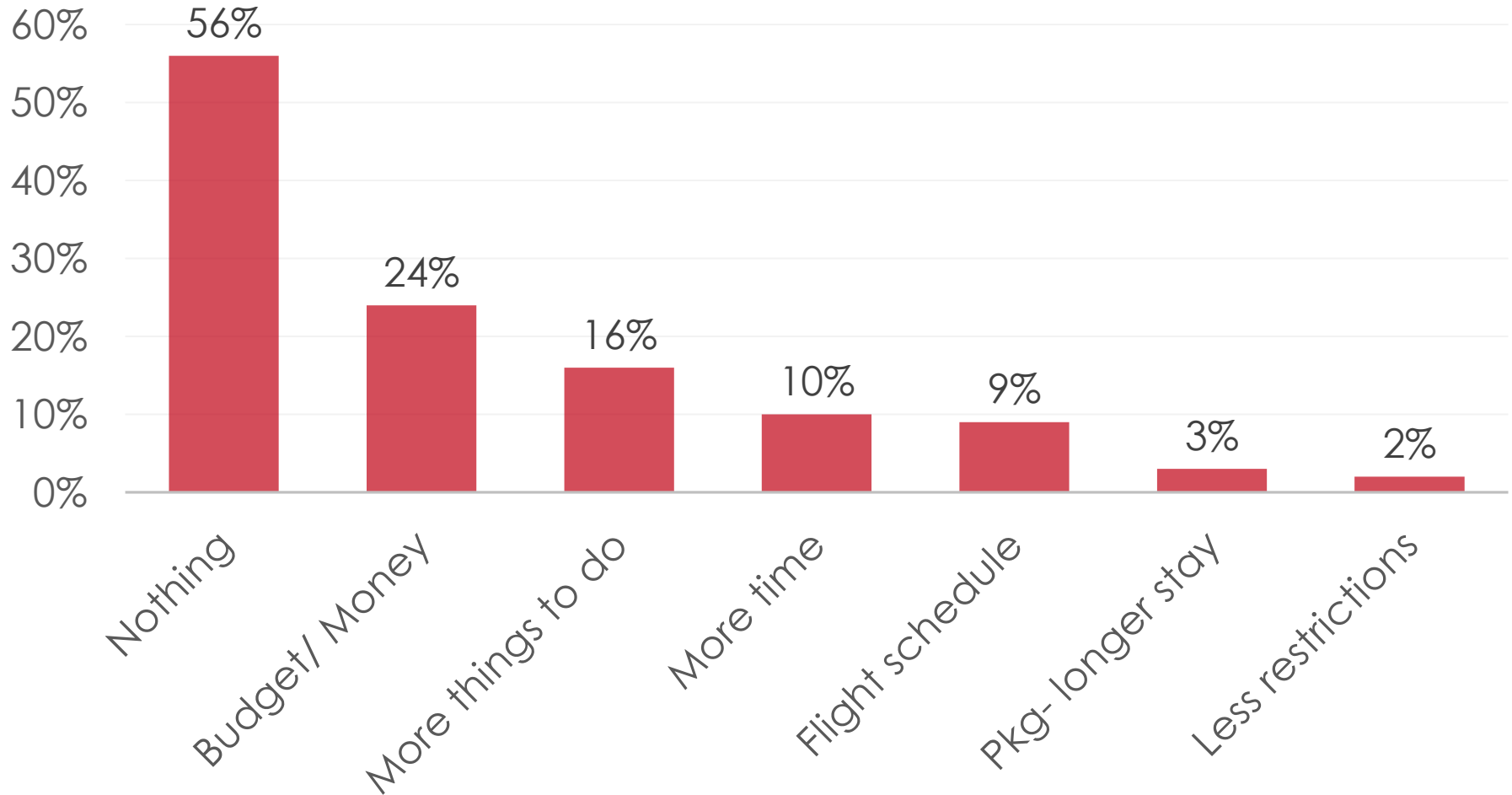Prepared by Anthology Research
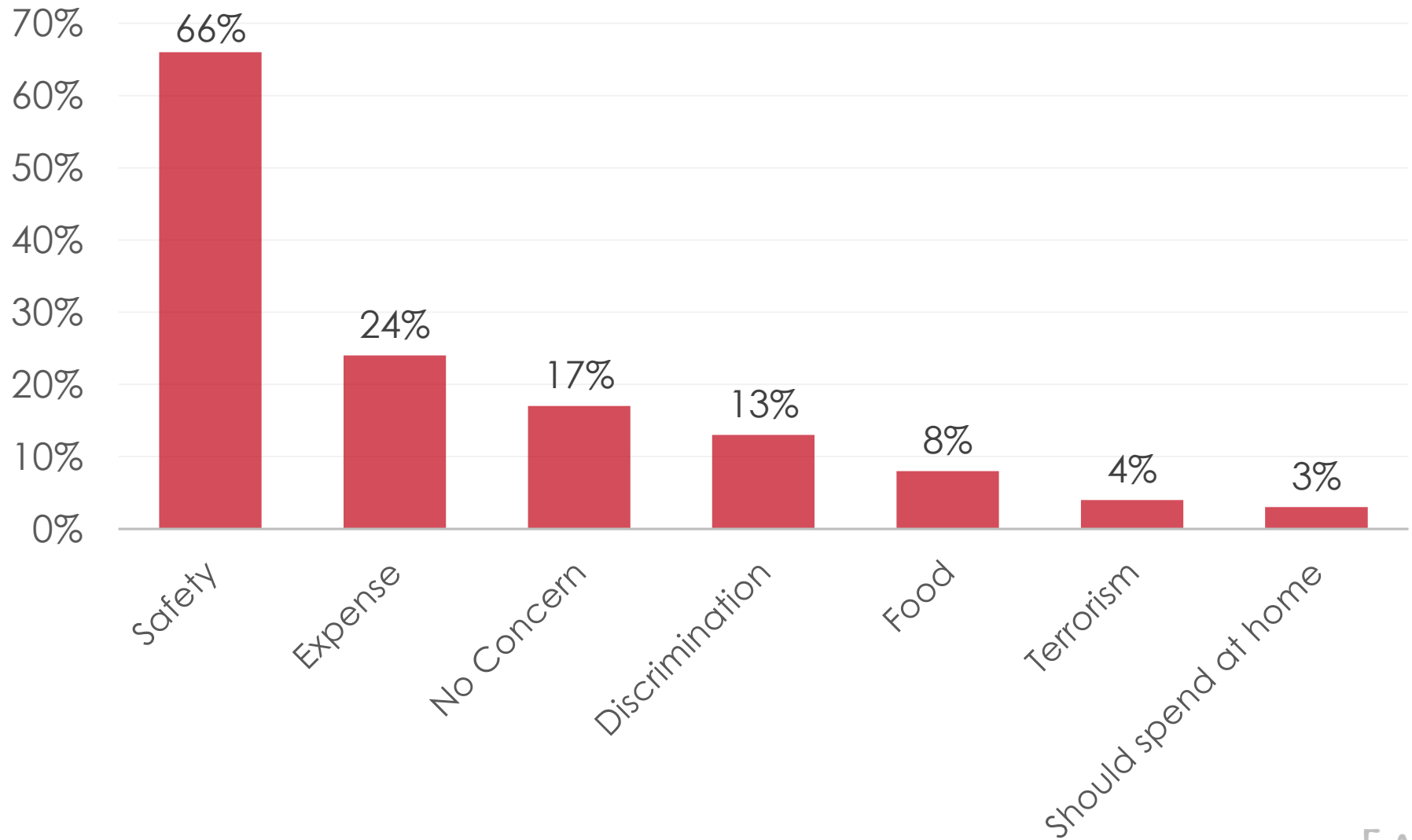
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SECTION 6
FUTURE TRAVEL TO GUAM

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

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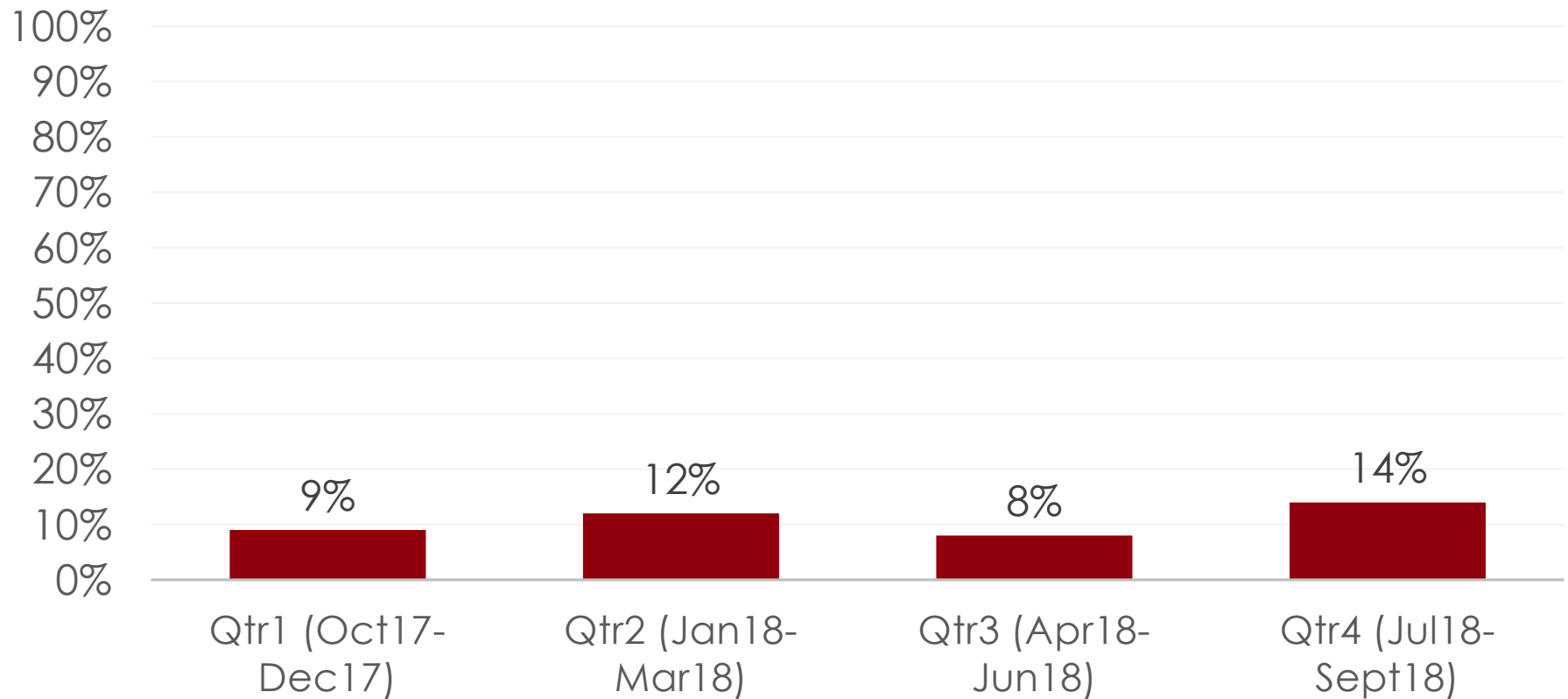
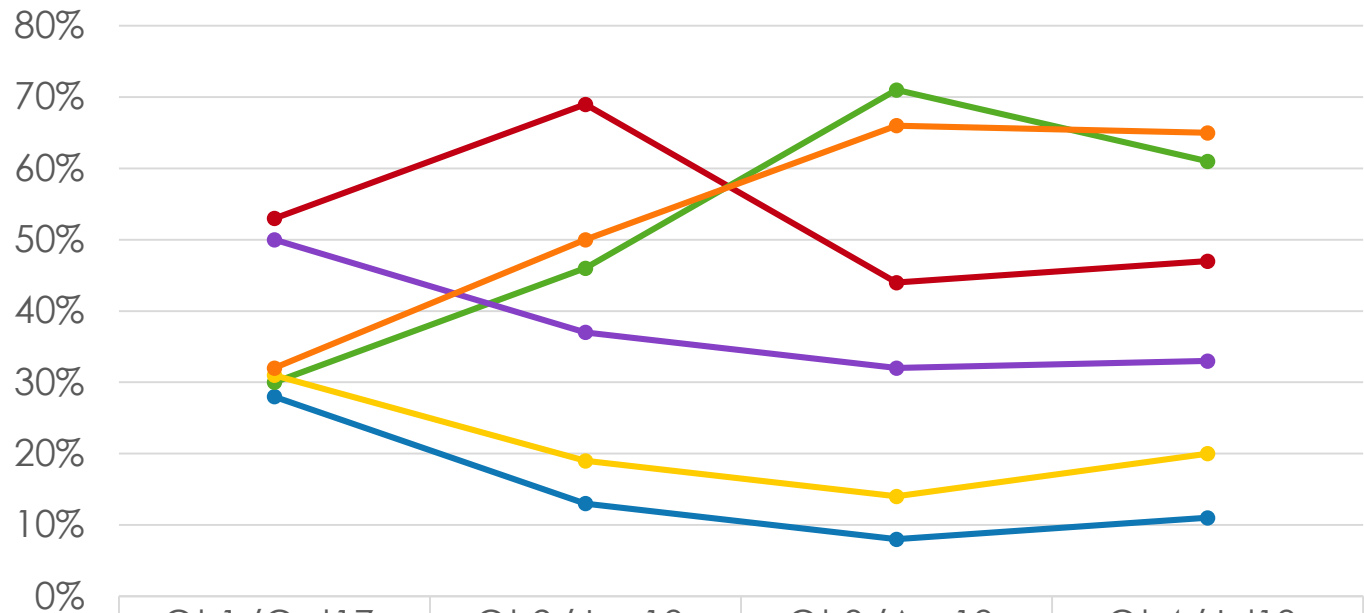# What would it take to make you stay an extra day on Guam?
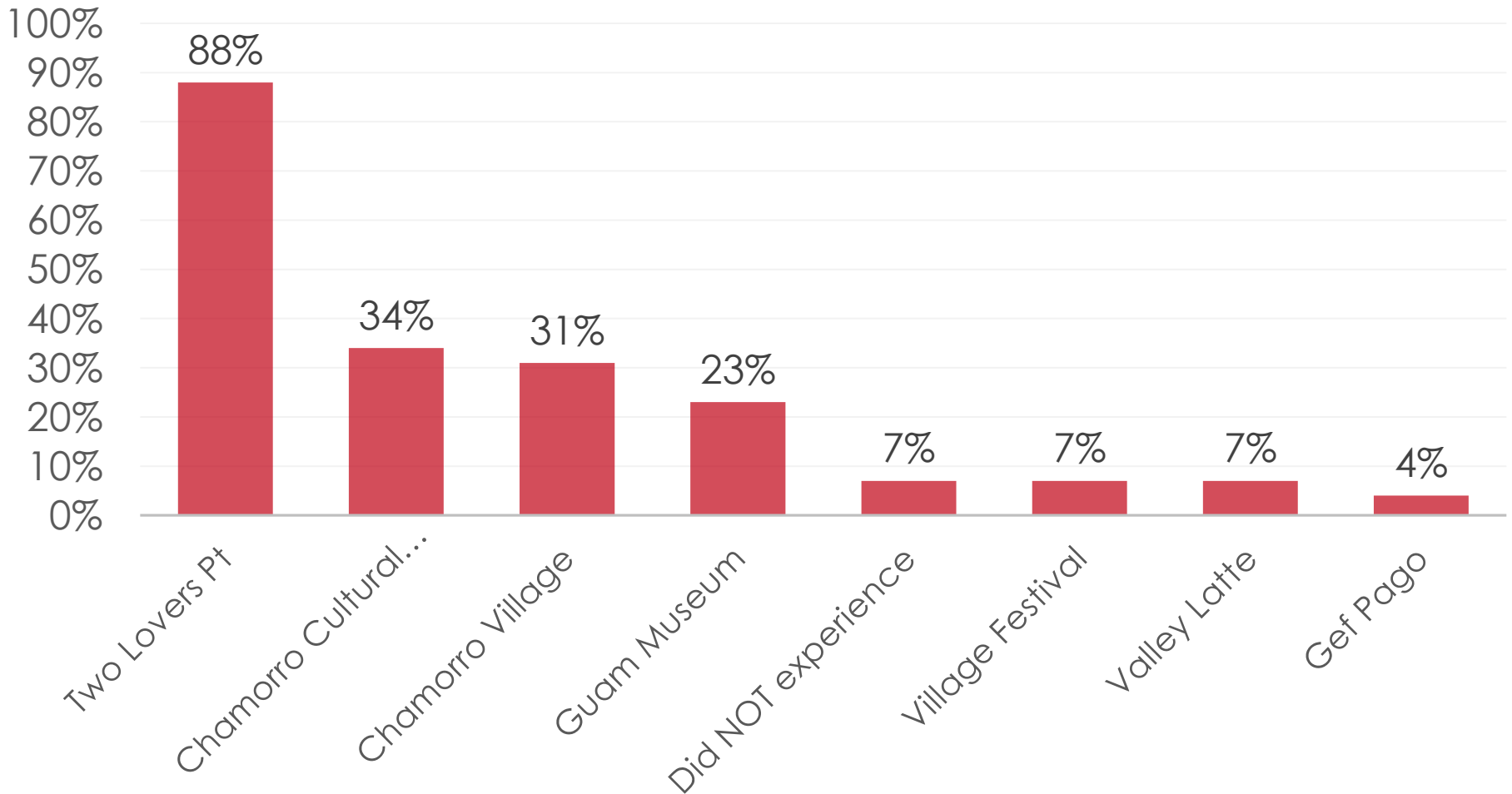
[A]

FUTURE TRAVEL CONCERNS

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SECTION 7
GUAM CULTURE

EXPERIENCED- CHAMORRO/ HAFA ADAI SPIRIT

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Did NOT experience	28%	13%	8%	11%
Beaches	53%	69%	44%	47%
Chamorro cuisine	30%	46%	71%	61%
Night Market	31%	19%	14%	20%
Socializing- locals	50%	37%	32%	33%
Local Music	32%	50%	66%	65%

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EXPERIENCED-
OTHER CULTURAL ACTIVITY/EVENTS

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SOURCES OF INFORMATION-CULTURAL ACTIVITY/EVENTS
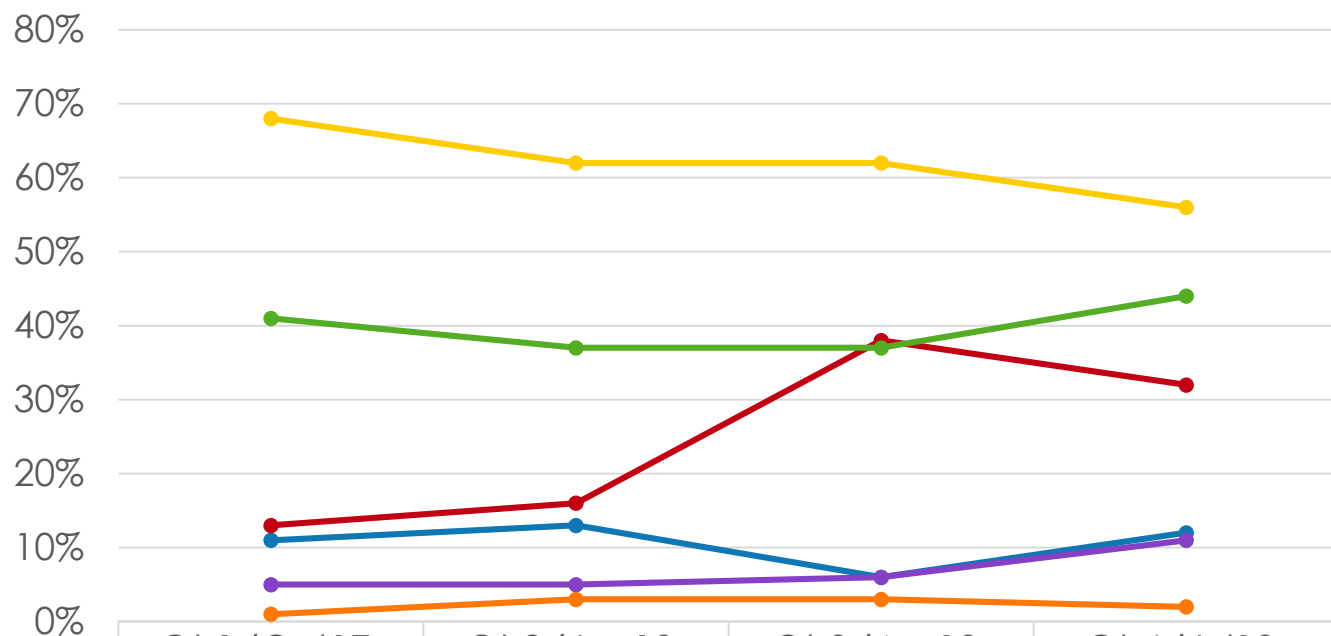
	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Travel guide/ brochure	11%	13%	6%	12%
Travel agency	13%	16%	38%	32%
Internet	41%	37%	37%	44%
Family/ Friends	68%	62%	62%	56%
Hotel staff	5%	5%	6%	11%
Print	1%	3%	3%	2%

SATISFACTION-CULTURAL ACTIVITY/EVENTS

Chart showing Excellent percentages and MEAN (5pt Scale) by quarter:

	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Excellent	21%	15%	11%	16%
MEAN (5pt Scale)	3.89	3.91	3.92	3.89

Legend: Excellent — MEAN (5pt Scale)

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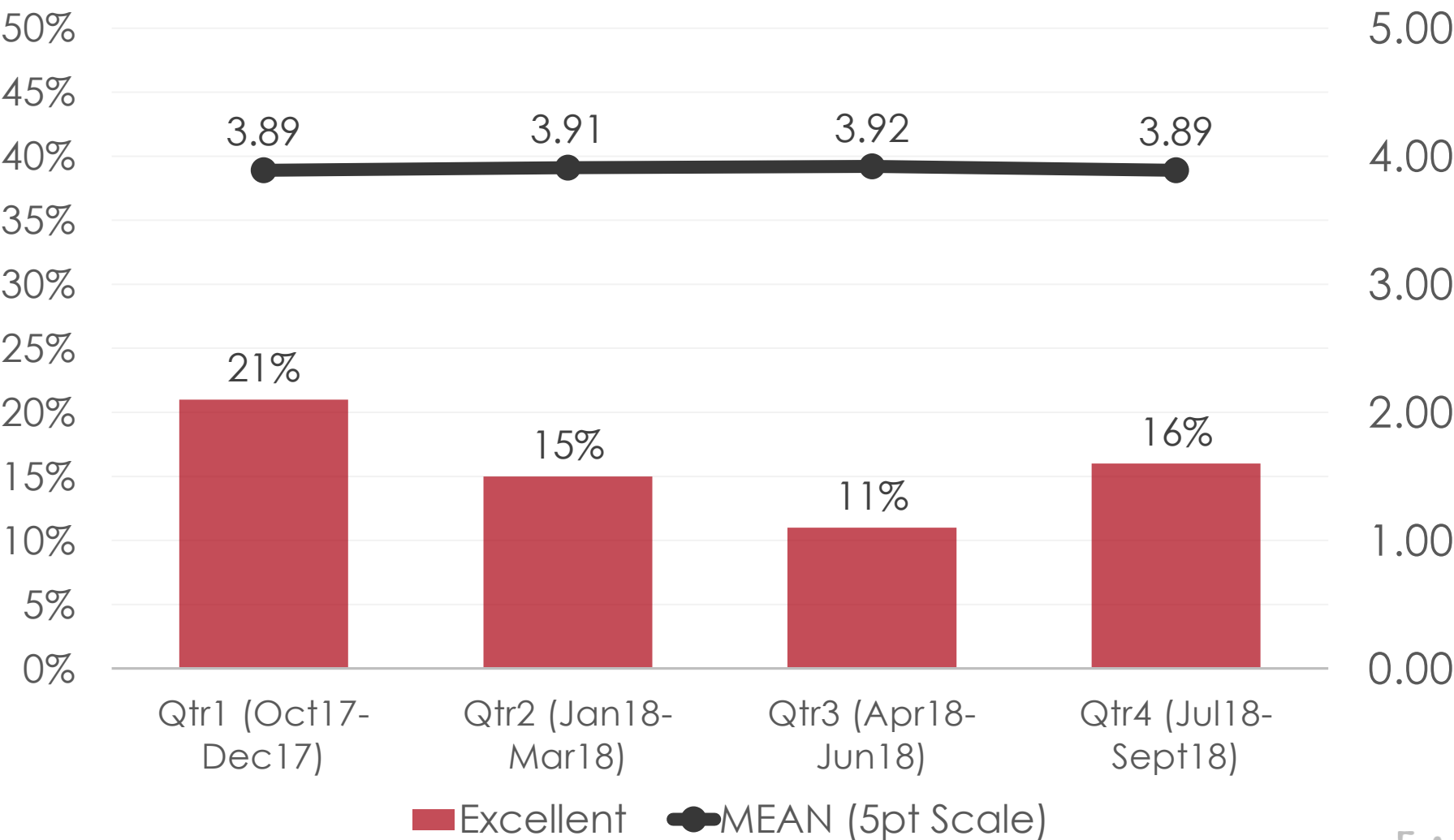
OBSTACLES-
CULTURAL ACTIVITY/EVENTS
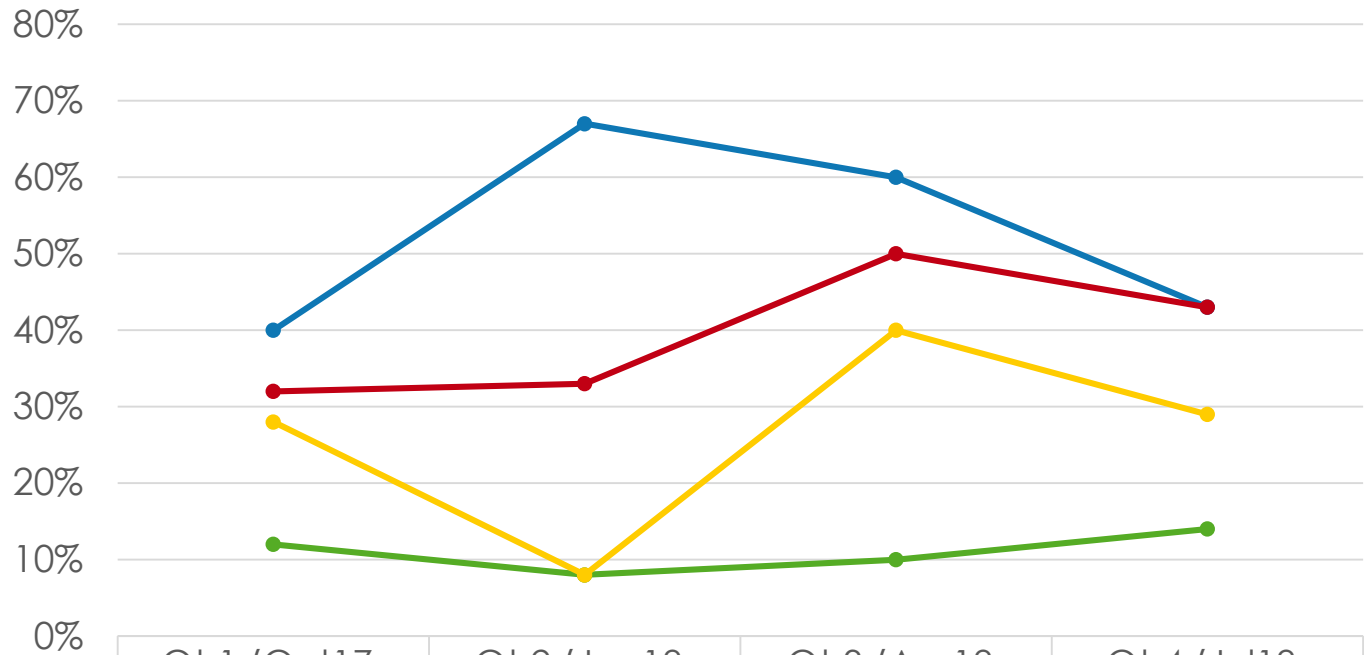
	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
Schedule	40%	67%	60%	43%
Unaware	32%	33%	50%	43%
Did not want to	12%	8%	10%	14%
Did not know where	28%	8%	40%	29%

[A]

ADVANCED STATISTICS

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.

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Drivers- Overall Satisfaction

Drivers of Overall Satisfaction, 1st, 2nd, 3rd and 4th Quarters 2018 and Overall 2018					
	1st Qtr. 2018	2nd Qtr. 2018	3rd Qtr. 2018	**4th Qtr. 2018**	1-4 Qtr Overall 2018
Drivers:	rank	rank	rank	**rank**	rank
Quality & Cleanliness of beaches & parks					
Ease of getting around		3			
Safety walking around at night	2				
Quality of daytime tours					
Variety of daytime tours					
Quality of nighttime tours					
Variety of nighttime tours					
Quality of shopping	3				2
Variety of shopping					
Price of things on Guam		2	2		
Quality of hotel accommodations			1		
Quality/cleanliness of air, sky					
Quality/cleanliness of parks	1				1
Quality of landscape in Tumon		1		**1**	
Quality of landscape in Guam					
Quality of ground handler					
Quality/cleanliness of transportation vehicles					
% of Per Person On Island Expenditures Accounted For	48.4%	71.9%	53.4%	**66.3%**	72.2%

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Drivers of Overall Satisfaction

- **Overall satisfaction** with Filipino visitor's experience on Guam is driven by one significant factor in the 4th Quarter FY2018 Period. It is:
  - **Quality of landscape in Tumon.**
- With this factor the overall r^2 is .663 meaning that **66.3% of overall satisfaction is accounted for by this factor.**

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Drivers – On-Isle Expenditures

Drivers of Per Person On Island Expenditures, 1st, 2nd, 3rd and 4th Qtr. 2018 and Overall 2018					
	1st Qtr 2018	2nd Qtr 2018	3rd Qtr 2018	**4th Qtr. 2018**	1-4 Qtr Overall 2018
Drivers:	rank	rank	rank	**rank**	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		1			
Quality of landscape in Guam		2			
Quality of ground handler					
Quality/cleanliness of transportation vehicles					
% of Per Person On Island Expenditures Accounted For	0.0%	19.7%	0.0%	**0.0%**	0.0%
NOTE: Only significant drivers are included.					

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Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Filipino visitors on Guam is driven by no significant factors in the 4th Quarter FY2018 Period.

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