



GUAM VISITORS BUREAU

Philippine Visitor Tracker Exit Profile

FY2015 Market Segmentation

OCT 2014~MAR 2015



Prepared by: QMark Research

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Background & Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Filipino speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **85** 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 **85** is +/- 10.63 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 +/- 10.63 percentage points.

OBJECTIVES

- **The specific objectives of the analysis were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - General Leisure Group
 - Traveling with children
 - Incentive Market
 - Male 20-40
 - Female 20-40
 - White-collar
 - Wedding/ Honeymooner
 - Student
 - Mid-Income
 - To identify the most significant factors affecting overall visitor satisfaction.
 - To identify (for all Philippine visitors) the most important determinants of on-island spending

Highlighted Segments Parameters

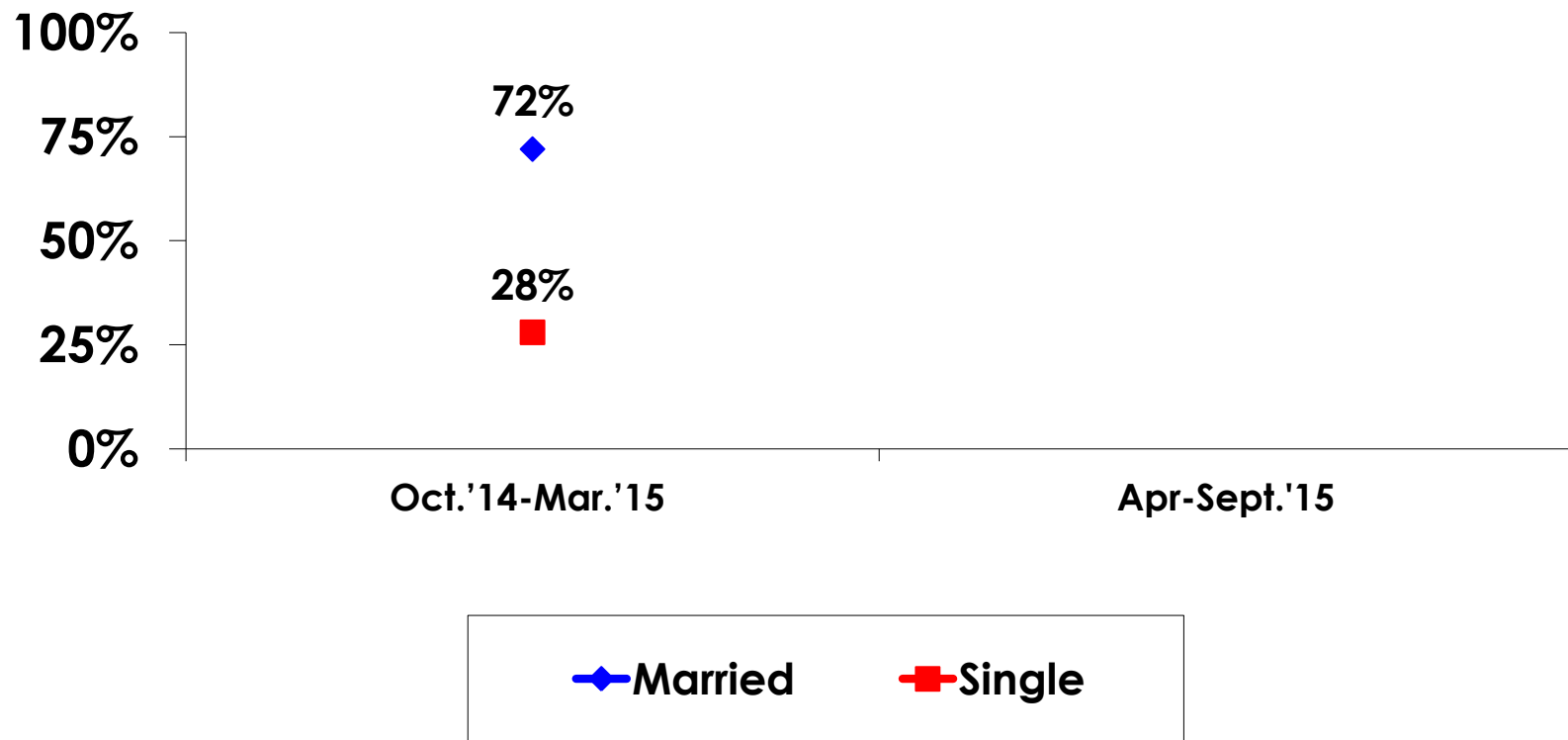
- General Leisure Group – Q.5A
- Traveling w/ child – Q6
- Incentive Market – Q5A/ Q7
- Males/ 20-40 – Gender/ QF
- Females/ 20-40 – Gender/ QF
- White-collar – Q25
- Wedding/ Honeymoon – Q5A
- Student – Q25
- Mid-Income – Q26

Highlighted Segments

	Oct.'14-Mar.'15	Apr-Sept.'15
General Leisure Group	39%	
Traveling w/ child	11%	
Incentive market	15%	
Male/ 20-40	11%	
Female/ 20-40	29%	
White-collar	44%	
Wedding/ Honeymoon	2%	
Student	2%	
Mid-income	19%	
TOTAL	85	

SECTION 1 **PROFILE OF RESPONDENTS**

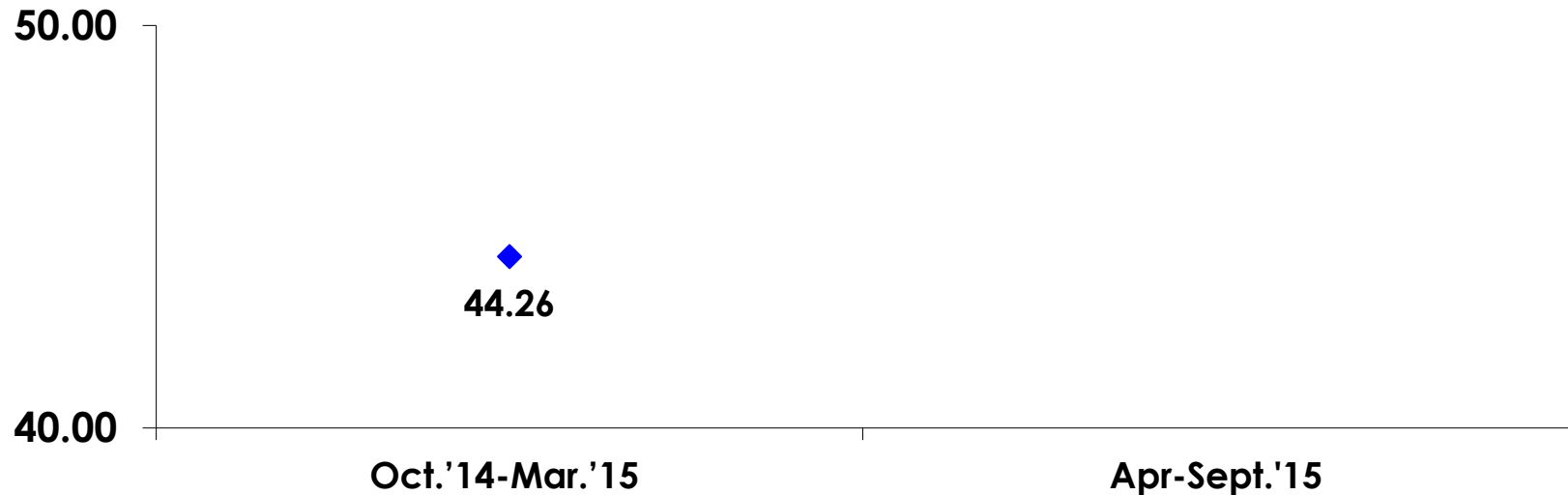
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20- 40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
QE	Married	Count	61	21	7	12	6	13	32	2	1	14
		Column N %	72%	64%	78%	92%	67%	52%	86%	100%	50%	88%
	Single	Count	24	12	2	1	3	12	5	0	1	2
		Column N %	28%	36%	22%	8%	33%	48%	14%	0%	50%	13%
	Total	Count	85	33	9	13	9	25	37	2	2	16

AVERAGE AGE - TRACKING



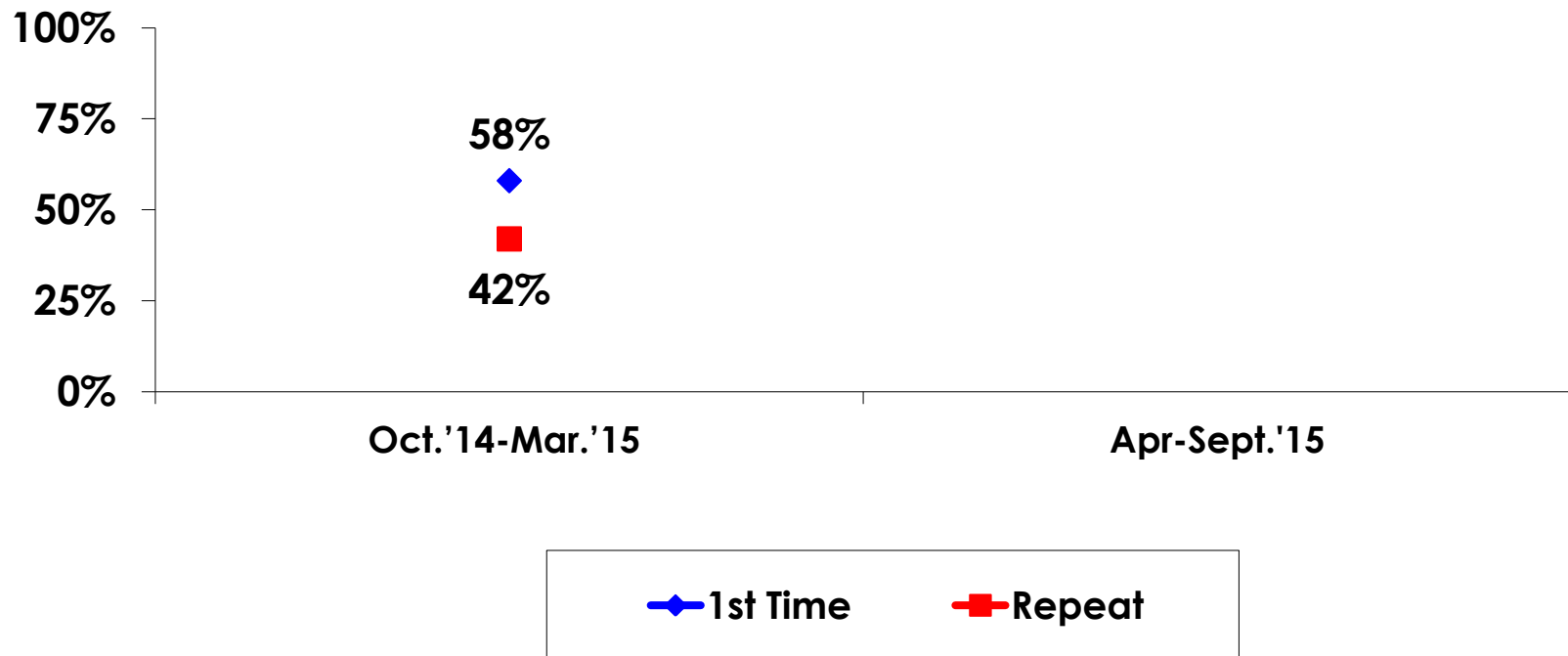
AGE- SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	10	4	1	1	0	7	1	0	1	1
		Column N %	12%	12%	11%	8%	0%	28%	3%	0%	50%	6%
	25-34	Count	18	9	1	2	7	11	5	1	0	3
		Column N %	21%	27%	11%	15%	78%	44%	14%	50%	0%	19%
	35-49	Count	21	12	1	1	2	7	17	1	0	7
		Column N %	25%	36%	11%	8%	22%	28%	46%	50%	0%	44%
	50+	Count	36	8	6	9	0	0	14	0	1	5
		Column N %	42%	24%	67%	69%	0%	0%	38%	0%	50%	31%
	Total	Count	85	33	9	13	9	25	37	2	2	16
QF	Mean		44.26	39.12	50.00	48.15	30.44	30.20	45.32	32.50	40.50	42.38
	Median		43	37	52	51	31	31	47	33	41	41

INCOME - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
Q26 <=50K	Count		8	4	0	1	0	5	2	0	0	0
	Column N %		11%	13%	0%	9%	0%	21%	6%	0%	0%	0%
50K-150K	Count		7	3	1	0	0	0	2	0	0	0
	Column N %		9%	10%	14%	0%	0%	0%	6%	0%	0%	0%
150K-250K	Count		7	4	0	0	1	3	1	0	1	0
	Column N %		9%	13%	0%	0%	14%	13%	3%	0%	100%	0%
250K-350K	Count		3	3	0	0	1	0	3	0	0	3
	Column N %		4%	10%	0%	0%	14%	0%	9%	0%	0%	19%
350K-450K	Count		13	3	0	4	1	6	10	1	0	13
	Column N %		18%	10%	0%	36%	14%	25%	29%	50%	0%	81%
450K+	Count		26	9	5	6	2	6	16	1	0	0
	Column N %		35%	29%	71%	55%	29%	25%	46%	50%	0%	0%
No Income	Count		10	5	1	0	2	4	1	0	0	0
	Column N %		14%	16%	14%	0%	29%	17%	3%	0%	0%	0%
Total	Count		74	31	7	11	7	24	35	2	1	16

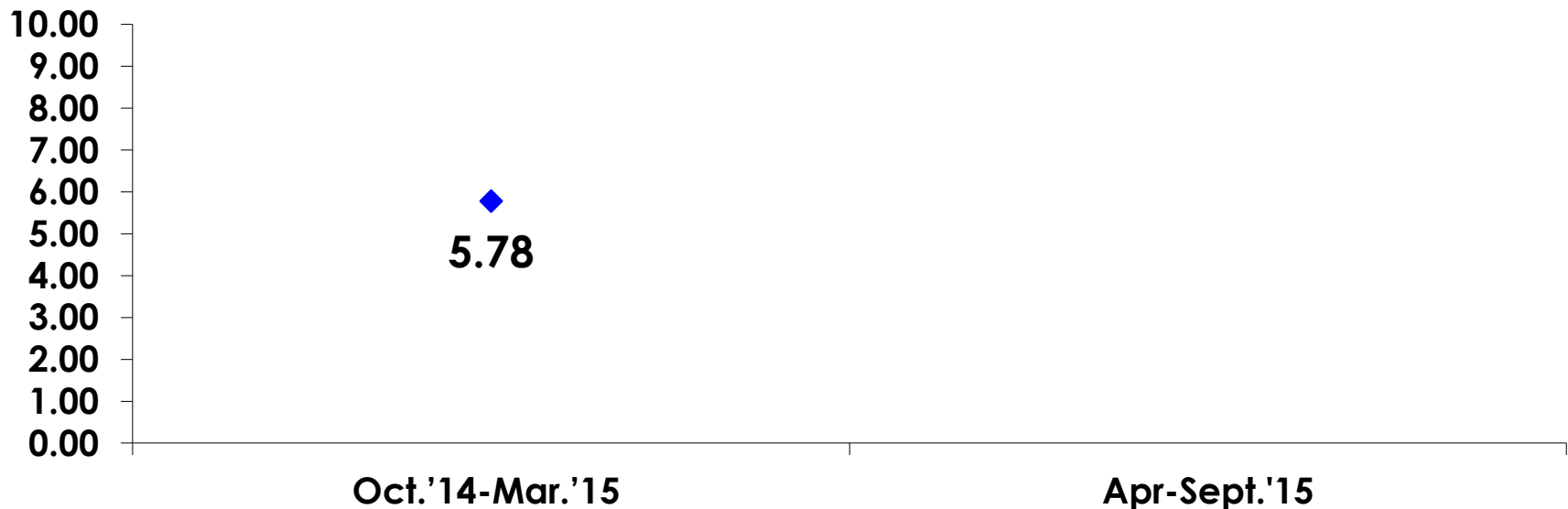
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	49	14	2	12	5	16	25	1	1	12
		Column N %	58%	42%	22%	92%	56%	64%	68%	50%	50%	75%
	No	Count	36	19	7	1	4	9	12	1	1	4
		Column N %	42%	58%	78%	8%	44%	36%	32%	50%	50%	25%
	Total	Count	85	33	9	13	9	25	37	2	2	16

AVG LENGTH OF STAY - TRACKING



AVG LENGTH OF STAY - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
Q8	Mean	5.78	5.09	6.11	3.25	6.78	5.64	4.83	5.50	3.50	3.87
	Median	3	3	3	3	3	3	3	6	4	3

SECTION 2 **TRAVEL PLANNING**

TRAVEL PLANNING - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
Q7	Full package tour	Count	15	3	0	4	1	5	9	1	0	3
		Column N %	18%	10%	0%	31%	13%	20%	25%	50%	0%	19%
	Free-time package tour	Count	11	3	2	1	1	4	5	0	0	4
		Column N %	13%	10%	22%	8%	13%	16%	14%	0%	0%	25%
	Individually arranged travel (FIT)	Count	42	24	6	0	5	15	11	1	2	6
		Column N %	51%	77%	67%	0%	63%	60%	31%	50%	100%	38%
	Group tour	Count	4	0	0	0	1	0	4	0	0	0
		Column N %	5%	0%	0%	0%	13%	0%	11%	0%	0%	0%
	Company paid travel	Count	8	1	0	8	0	1	5	0	0	3
		Column N %	10%	3%	0%	62%	0%	4%	14%	0%	0%	19%
	Other	Count	3	0	1	0	0	0	2	0	0	0
		Column N %	4%	0%	11%	0%	0%	0%	6%	0%	0%	0%
	Total	Count	83	31	9	13	8	25	36	2	2	16

TRAVEL MOTIVATION - SEGMENTATION

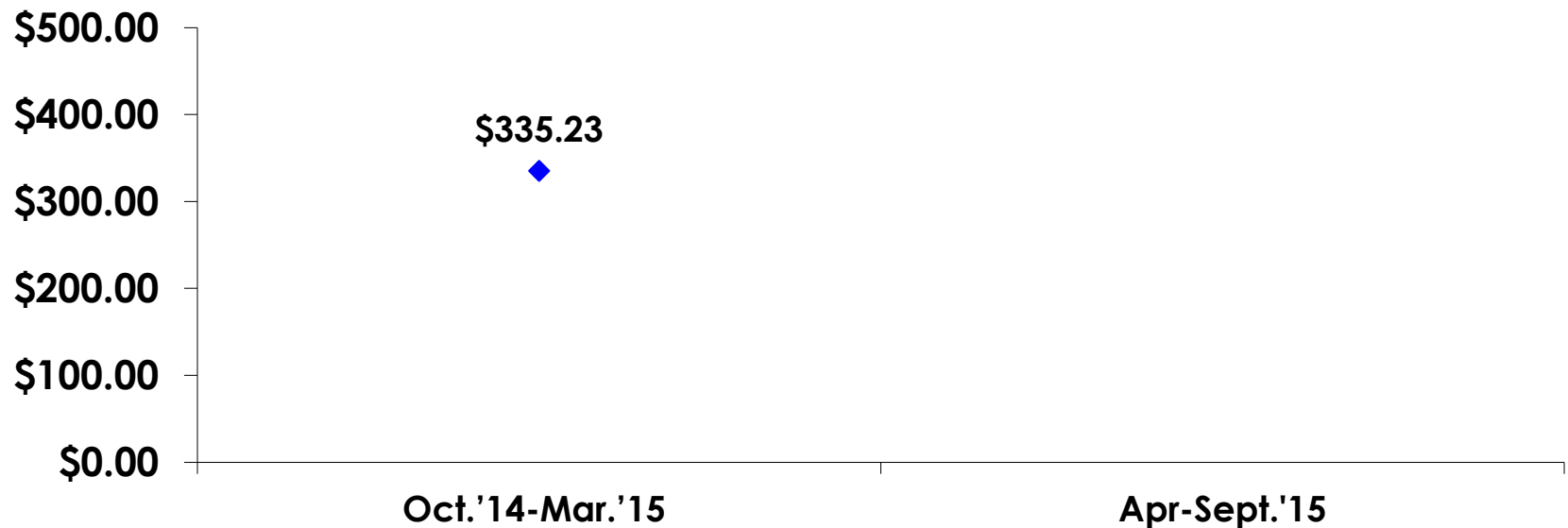
		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	27%	36%	44%	0%	33%	24%	19%	0%	0%	13%
	Price	12%	3%	22%	8%	11%	12%	14%	50%	50%	13%
	Visit friends/ Relatives	34%	30%	33%	0%	33%	32%	19%	50%	50%	13%
	Recomm- friend/family/trvl agnt	15%	27%	11%	8%	56%	16%	5%	0%	0%	19%
	Scuba	2%	3%	0%	0%	0%	8%	0%	50%	0%	6%
	Water sports	4%	6%	0%	0%	0%	8%	0%	50%	0%	6%
	Short travel time	15%	27%	22%	8%	11%	20%	14%	0%	0%	25%
	Golf	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Relax	33%	85%	33%	8%	33%	52%	27%	50%	50%	38%
	Company/ Business Trip	26%	12%	11%	77%	22%	28%	46%	50%	0%	31%
	Company Sponsored	8%	3%	0%	54%	11%	8%	11%	0%	0%	13%
	Convention/ Trade/ Conference	5%	0%	0%	23%	0%	4%	5%	0%	0%	6%
	Safe	20%	27%	33%	8%	22%	20%	14%	0%	50%	19%
	Natural beauty	31%	58%	33%	15%	22%	48%	24%	100%	0%	31%
	Shopping	46%	67%	33%	46%	44%	52%	38%	50%	50%	50%
	Career Cert/ Testing	1%	3%	0%	0%	11%	0%	0%	0%	0%	0%
	Married/ Attn wedding	1%	0%	0%	0%	0%	4%	0%	50%	0%	6%
	Honeymoon	1%	3%	0%	0%	0%	4%	3%	50%	0%	0%
	Pleasure	21%	55%	22%	8%	33%	32%	16%	0%	0%	19%
	Other	5%	6%	11%	0%	0%	4%	8%	0%	0%	6%
	Total	Count	85	33	9	13	9	25	37	2	16

INFORMATION SOURCES - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME	
		-	-	-	-	-	-	-	-	-	-	
Q1	Internet	64%	69%	67%	58%	89%	67%	64%	50%	50%	63%	
	Friend/ Relative	60%	63%	67%	42%	89%	58%	39%	100%	50%	44%	
	Prior Trip	33%	38%	67%	8%	33%	25%	25%	50%	0%	19%	
	Travel Agent Brochure	22%	16%	11%	58%	11%	21%	31%	50%	0%	19%	
	Magazine (Consumer)	18%	31%	11%	8%	22%	8%	11%	0%	0%	6%	
	Co-Worker/ Company Trvl Dept	16%	13%	0%	42%	11%	21%	28%	50%	0%	25%	
	TV	11%	9%	11%	17%	11%	4%	11%	0%	0%	13%	
	Newspaper	8%	6%	11%	0%	11%	0%	3%	0%	0%	0%	
	Travel Trade Show	5%	13%	0%	0%	0%	0%	8%	0%	0%	6%	
	GVB Office	4%	9%	11%	0%	0%	4%	8%	0%	0%	0%	
	GVB Promo	4%	6%	0%	0%	0%	4%	3%	0%	0%	0%	
	Travel Guidebook-Bookstore	4%	3%	0%	0%	0%	4%	3%	0%	0%	6%	
	Other	1%	3%	0%	0%	11%	0%	0%	0%	0%	0%	
	Consumer Trvl Show	1%	3%	0%	0%	0%	0%	0%	0%	0%	0%	
	Radio	1%	0%	0%	0%	11%	0%	0%	0%	0%	0%	
	Total	Count	83	32	9	12	9	24	36	2	2	16

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$335.23

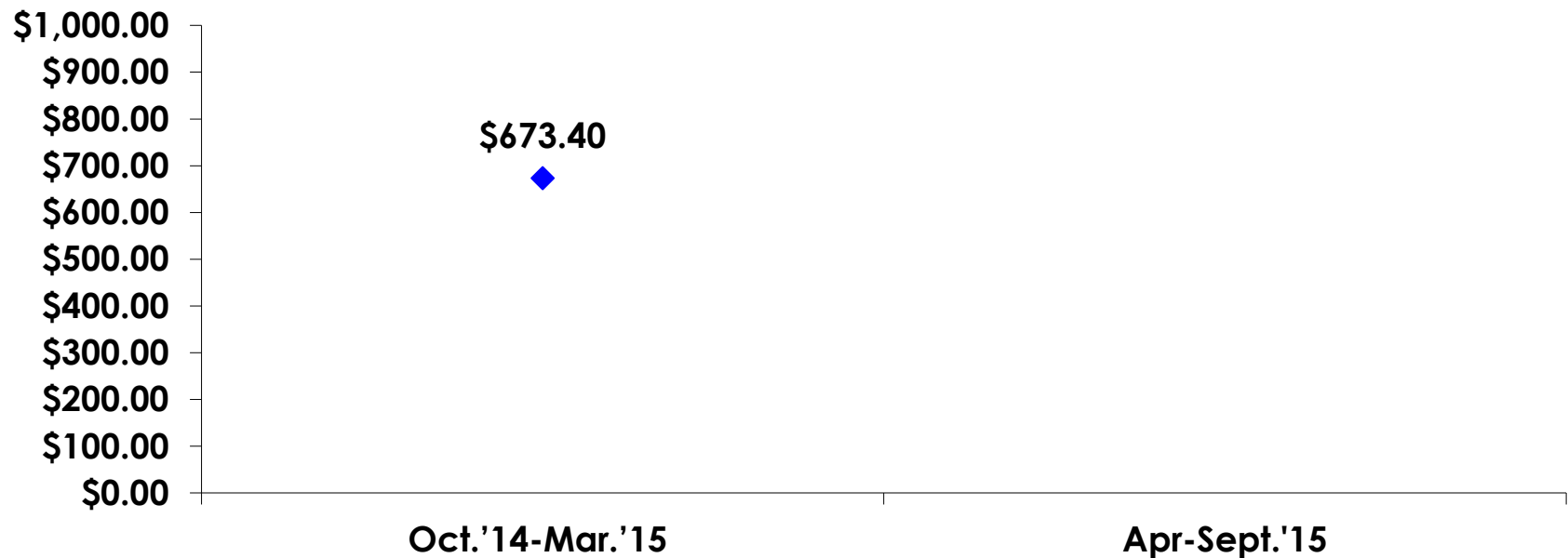
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$335.23	\$510.05	\$520.90	\$44.54	\$159.91	\$353.05	\$396.05	\$579.04	\$196.76	\$484.43
	Median	\$0	\$394	\$450	\$0	\$0	\$0	\$0	\$579	\$197	\$450
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$461	\$0	\$0
	Maximum	\$2,856	\$2,856	\$1,607	\$579	\$933	\$1,687	\$2,856	\$697	\$394	\$1,687

PREPAID EXPENSE- BREAKDOWN

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$948.95	\$869.50	\$562.18	.	\$1,011.92	\$224.87	\$888.24	.	\$787.05	\$1,405.44
	Median	\$787	\$787	\$562	.	\$1,012	\$225	\$810	.	\$787	\$1,405
AIR/ HOTEL/ MEAL	Mean	\$1,164.43	\$899.48	\$1,607.38	\$1,124.35	.	\$798.29	\$1,281.27	\$798.29	.	\$1,105.10
	Median	\$1,124	\$899	\$1,607	\$1,124	.	\$798	\$1,309	\$798	.	\$1,124
AIR ONLY	Mean	\$632.76	\$592.45	\$668.99	.	\$854.51	\$580.92	\$536.48	.	.	\$517.20
	Median	\$528	\$562	\$641	.	\$855	\$450	\$607	.	.	\$450
HOTEL ONLY	Mean	\$375.25	\$375.25	\$640.88	.	.	\$361.67	\$502.21	.	.	\$138.67
	Median	\$281	\$281	\$641	.	.	\$225	\$607	.	.	\$112
HOTEL & MEAL	Mean	\$202.38	\$224.87	.	.	.	.	\$224.87	.	.	.
	Median	\$202	\$225	.	.	.	.	\$225	.	.	.
F&B HOTEL	Mean	\$61.84	\$112.44	.	\$11.24	.	\$112.44	\$61.84	.	.	\$11.24
	Median	\$62	\$112	.	\$11	.	\$112	\$62	.	.	\$11
TRANS- TAIWAN	Mean	\$20.24	\$18.74	\$22.49	\$22.49	.	\$18.74	\$22.49	\$22.49	.	\$22.49
	Median	\$22	\$22	\$22	\$22	.	\$22	\$22	\$22	.	\$22
TRANS- GUAM	Mean	\$202.38	\$202.38	\$179.90	.	.	\$224.87	\$202.38	.	.	.
	Median	\$202	\$202	\$180	.	.	\$225	\$202	.	.	.
OPT TOURS	Mean	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.
OTHER	Mean	\$769.38	\$854.51	\$854.51	.	\$1,011.92	\$44.97	\$1,096.24	.	.	\$1,011.92
	Median	\$855	\$562	\$855	.	\$1,012	\$45	\$933	.	.	\$1,012
TOTAL	Mean	\$440.86	\$679.04	\$795.74	\$89.08	\$319.82	\$441.20	\$564.86	\$809.53	\$393.52	\$666.79
	Median	\$0	\$562	\$562	\$0	\$0	\$0	\$0	\$810	\$394	\$478

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$673.40

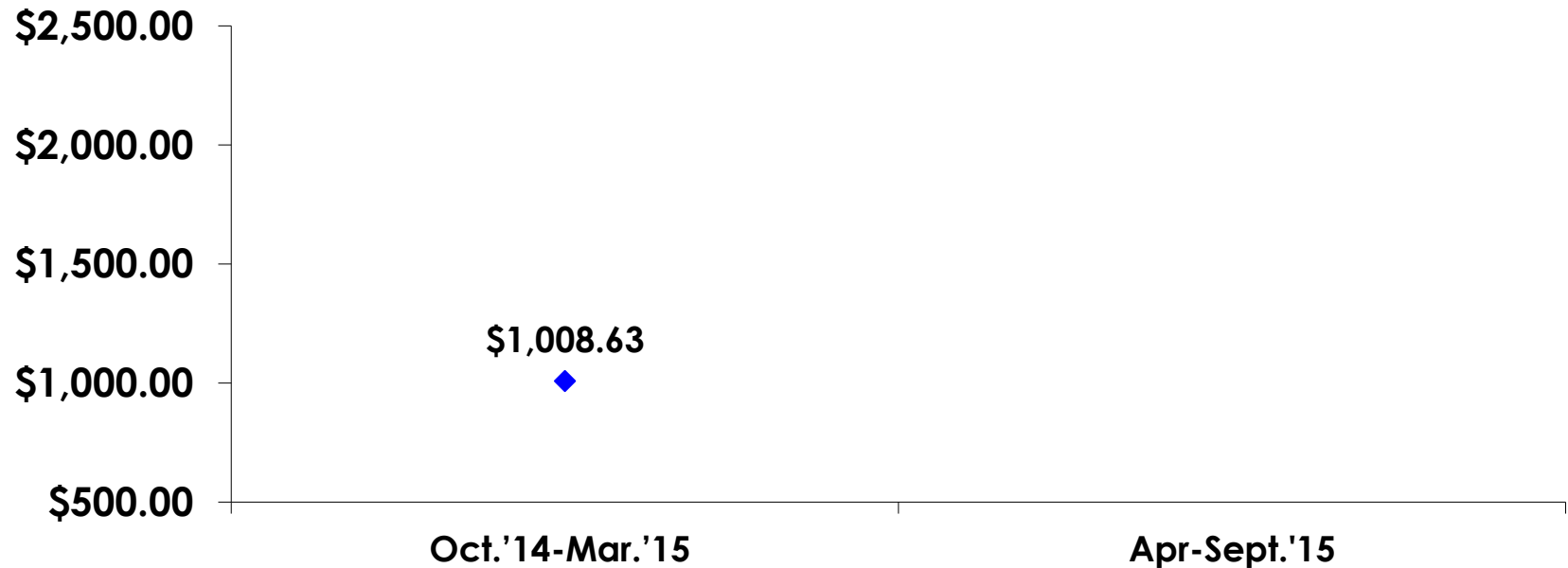
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$673.40	\$452.70	\$1,251.19	\$810.00	\$381.11	\$526.39	\$793.41	\$1,850.00	\$635.00	\$603.59
	Median	\$380	\$300	\$994	\$700	\$250	\$400	\$500	\$1,850	\$635	\$403
	Minimum	\$0	\$0	\$0	\$230	\$0	\$0	\$0	\$1,000	\$270	\$0
	Maximum	\$4,200	\$3,000	\$4,200	\$2,040	\$1,000	\$2,700	\$4,200	\$2,700	\$1,000	\$2,700

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$46.29	\$7.09	\$366.67	\$0.00	\$7.11	\$10.80	\$93.95	\$100.00	\$20.00	\$20.00
F&B FF/STORE	Mean	\$39.75	\$31.09	\$63.11	\$35.00	\$74.00	\$23.60	\$39.95	\$0.00	\$125.00	\$41.25
F&B RESTRNT	Mean	\$36.07	\$34.55	\$140.11	\$18.85	\$11.11	\$43.00	\$41.51	\$300.00	\$25.00	\$32.81
OPT TOUR	Mean	\$14.87	\$6.36	\$0.00	\$39.23	\$0.00	\$43.80	\$18.35	\$230.00	\$0.00	\$67.50
GIFT- SELF	Mean	\$104.80	\$84.85	\$111.11	\$108.85	\$72.78	\$107.72	\$128.32	\$160.00	\$25.00	\$120.00
GIFT- OTHER	Mean	\$191.88	\$187.58	\$172.22	\$279.62	\$30.00	\$137.40	\$275.27	\$250.00	\$25.00	\$118.75
TRANS	Mean	\$30.92	\$25.76	\$135.00	\$20.23	\$7.22	\$15.40	\$63.19	\$50.00	\$25.00	\$30.50
OTHER	Mean	\$297.08	\$181.97	\$411.11	\$312.08	\$295.56	\$267.00	\$274.78	\$1,260.00	\$525.00	\$298.56
TOTAL	Mean	\$772.32	\$559.39	\$1,399.33	\$883.08	\$497.78	\$648.92	\$935.32	\$2,350.00	\$770.00	\$729.38

TOTAL EXPENDITURES – TRACKING



YTD=\$1,008.63

TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$1,008.63	\$962.75	\$1,772.09	\$854.54	\$541.02	\$879.43	\$1,189.46	\$2,429.04	\$831.76	\$1,088.02
	Median	\$921	\$887	\$1,950	\$700	\$300	\$888	\$962	\$2,429	\$832	\$874
	Minimum	\$0	\$0	\$0	\$230	\$0	\$0	\$0	\$1,461	\$664	\$0
	Maximum	\$5,856	\$5,856	\$4,762	\$2,040	\$1,183	\$3,397	\$5,856	\$3,397	\$1,000	\$3,397

SECTION 4 **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.

Drivers of Overall Satisfaction, 1st Qtr 2015	
Drivers:	rank
Quality & Cleanliness of beaches & parks	
Ease of getting around	4
Safety walking around at night	
Quality of daytime tours	3
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	6
Quality/cleanliness of parks	5
Quality of landscape in Tumon	
Quality of landscape in Guam	
Quality of ground handler	1
Quality/cleanliness of transportation vehicles	2
% of Overall Satisfaction Accounted For	77.5%
NOTE: Only significant drivers are included.	

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Philippine visitor's experience on Guam is driven by six significant factors in the 1st Quarter 2015 Period. By rank order they are:
 - **Quality of ground handler,**
 - **Quality/cleanliness of transportation vehicles,**
 - **Quality of day time tours,**
 - **Ease of getting around,**
 - **Quality/cleanliness of parks, and**
 - **Quality/cleanliness of air, sky.**
- With all six factors the overall r^2 is .775 meaning that **77.5% of overall satisfaction is accounted for by these factors.**

Drivers of Per Person On Island Expenditures, 1st Qtr 2015

Drivers:	rank
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	
Variety of nighttime tours	2
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	1
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	21.0%
NOTE: Only significant drivers are included.	

Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** of Philippine visitors on Guam is driven by three significant factors in the 1st Quarter 2015 Period. By rank order, they are:
 - **Quality of ground handler,**
 - **Variety of night time tours, and**
 - **Quality & cleanliness of beaches & parks.**
- With these factors, the overall r^2 is .21 meaning that **21.0% of per person on island expenditure is accounted for by these factors.**