



GUAM VISITORS BUREAU

Philippine Visitor Tracker Exit Profile

FY2016 Market Segmentation

4TH QTR (JUL~SEPT 2016)



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 **107** 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 **107** is +/- 9.4 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 +/- 9.4 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 Filipino 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

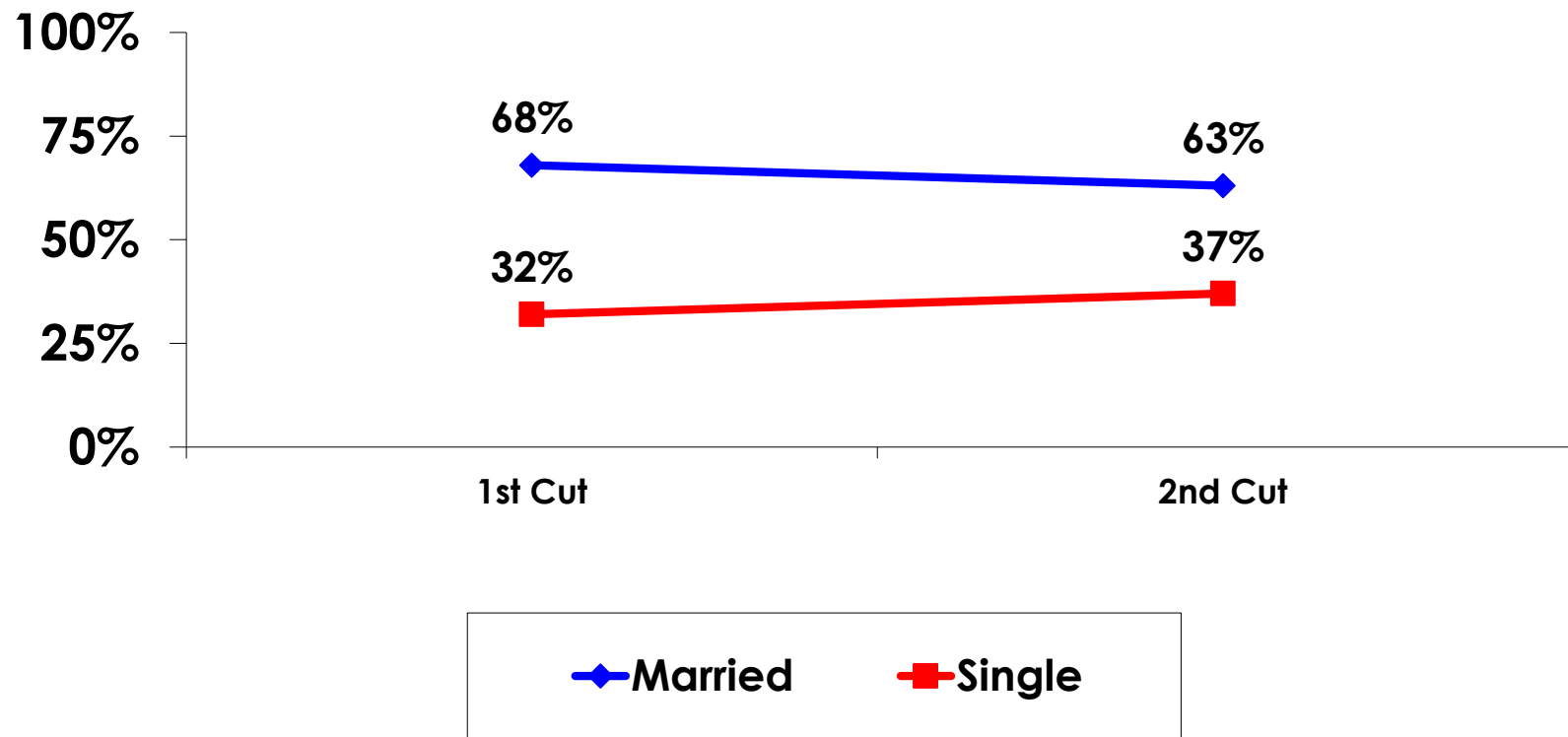
Highlighted Segments

	Oct15-June16	Jul16-Sept16
General Leisure Group	55%	66%
Traveling w/ child	19%	15%
Incentive market	6%	2%
Male/ 20-40	22%	19%
Female/ 20-40	22%	22%
White-collar	47%	45%
Wedding/ Honeymoon	2%	3%
Student	2%	7%
Mid-income	17%	23%
TOTAL	127	107

SECTION 1

PROFILE OF RESPONDENTS

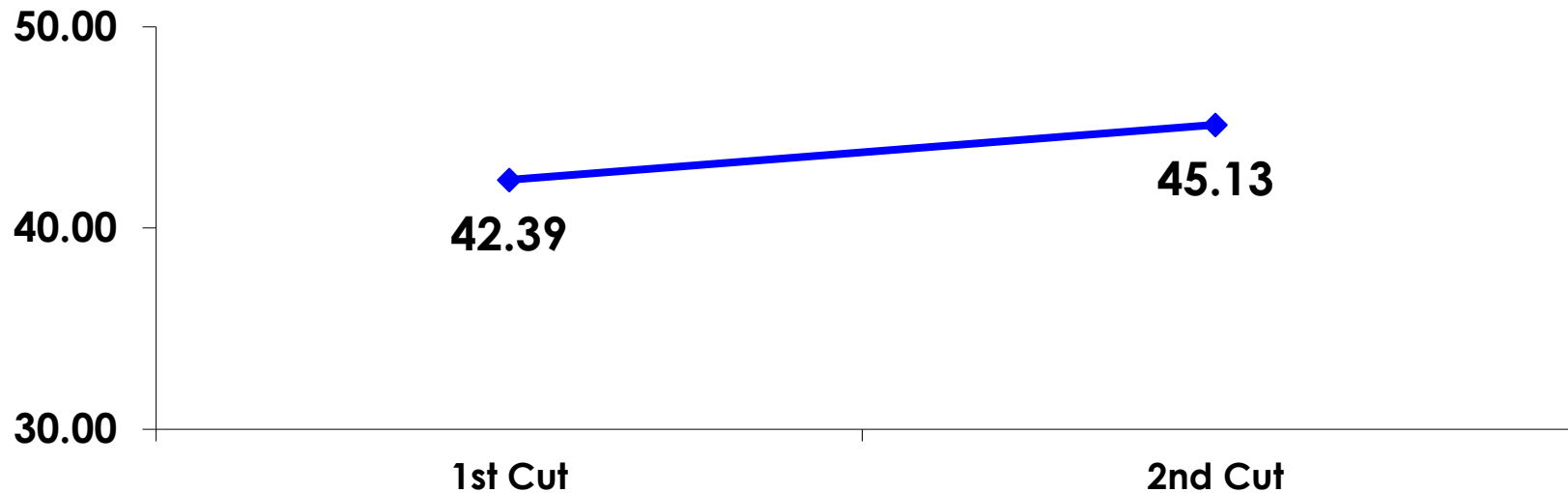
MARITAL STATUS- SEGMENTATION



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	67	44	15	1	7	10	30	3	5	18
		Column N %	63%	62%	94%	50%	35%	43%	63%	100%	71%	72%
	Single	Count	40	27	1	1	13	13	18	0	2	7
		Column N %	37%	38%	6%	50%	65%	57%	38%	0%	29%	28%
	Total	Count	107	71	16	2	20	23	48	3	7	25

AGE- SEGMENTATION



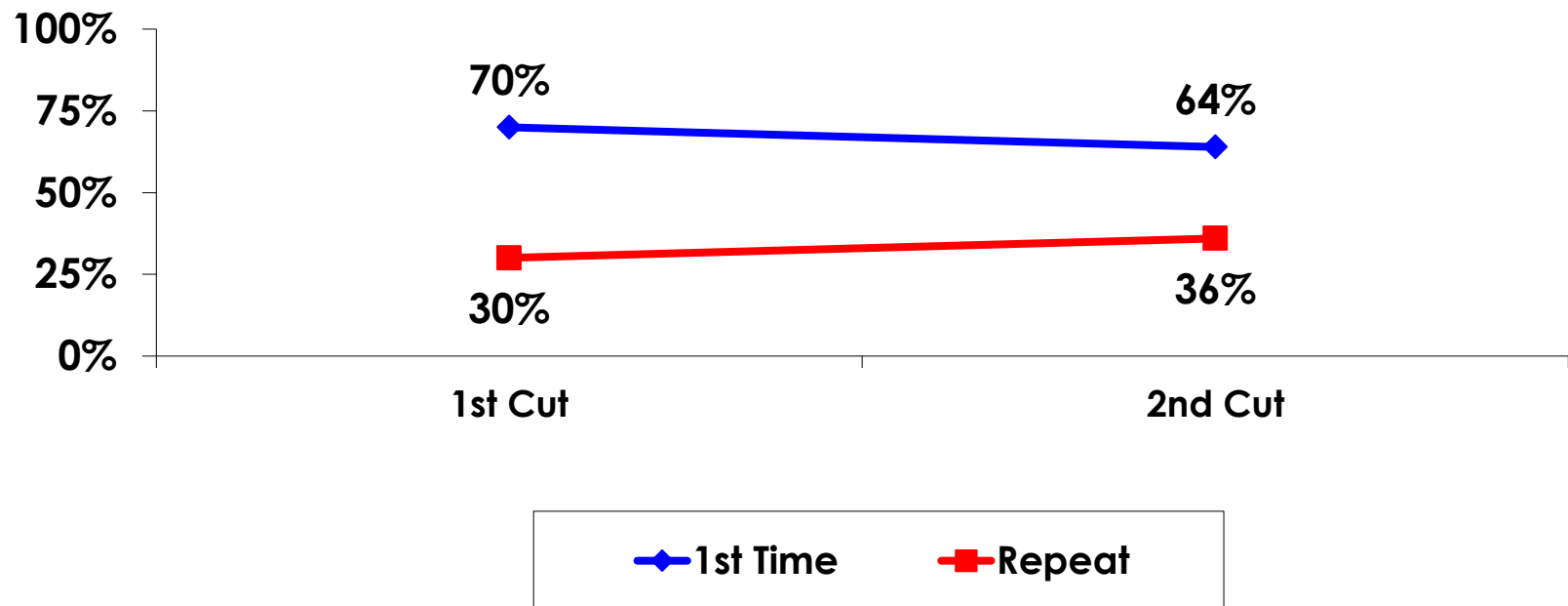
AGE- SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20- 40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	6	6	0	0	3	2	2	0	0	0
		Column N %	6%	9%	0%	0%	15%	9%	4%	0%	0%	0%
	25-34	Count	24	16	2	0	11	13	11	2	1	4
		Column N %	23%	23%	13%	0%	55%	57%	23%	67%	14%	16%
	35-49	Count	33	26	9	2	6	8	17	1	2	7
		Column N %	31%	37%	56%	100%	30%	35%	35%	33%	29%	28%
	50+	Count	43	22	5	0	0	0	18	0	4	14
		Column N %	41%	31%	31%	0%	0%	0%	38%	0%	57%	56%
	Total	Count	106	70	16	2	20	23	48	3	7	25
QF	Mean		45.13	42.96	45.81	42.50	31.50	31.61	44.60	33.33	51.14	50.80
	Median		46	43	47	43	32	33	46	31	53	52

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	12	6	1	1	3	3	6	0	2	0
		Column N %	12%	9%	6%	50%	17%	13%	13%	0%	29%	0%
	50K-150K	Count	16	12	3	0	1	4	9	1	0	0
		Column N %	16%	18%	19%	0%	6%	17%	20%	33%	0%	0%
	150K-250K	Count	10	3	1	0	3	1	3	0	3	0
		Column N %	10%	4%	6%	0%	17%	4%	7%	0%	43%	0%
	250K-350K	Count	12	8	2	0	2	2	5	0	0	12
		Column N %	12%	12%	13%	0%	11%	9%	11%	0%	0%	48%
	350K-450K	Count	13	7	2	1	1	3	5	0	2	13
		Column N %	13%	10%	13%	50%	6%	13%	11%	0%	29%	52%
	450K+	Count	29	25	7	0	6	9	17	2	0	0
		Column N %	29%	37%	44%	0%	33%	39%	38%	67%	0%	0%
	No Income	Count	8	6	0	0	2	1	0	0	0	0
		Column N %	8%	9%	0%	0%	11%	4%	0%	0%	0%	0%
	Total	Count	100	67	16	2	18	23	45	3	7	25
		Column N %										

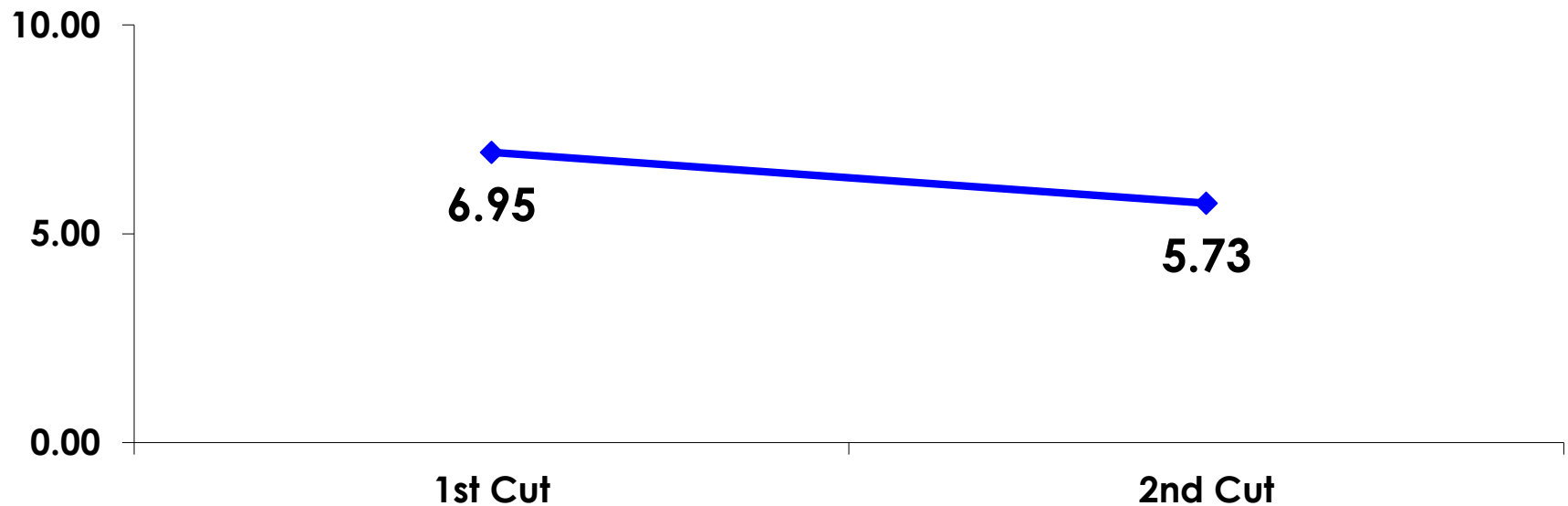
PRIOR TRIPS TO GUAM - SEGMENTATION



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	69	49	12	0	16	14	31	1	5	20
		Column N %	64%	69%	75%	0%	80%	61%	65%	33%	71%	80%
	No	Count	38	22	4	2	4	9	17	2	2	5
		Column N %	36%	31%	25%	100%	20%	39%	35%	67%	29%	20%
	Total	Count	107	71	16	2	20	23	48	3	7	25
		Column N %	64%	69%	75%	100%	80%	61%	65%	33%	71%	80%

AVG LENGTH OF STAY - SEGMENTATION



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	5.73	5.87	4.00	10.00	7.05	4.05	4.85	5.00	7.83	4.76
	Median	4	4	4	10	4	4	4	5	4	4

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	4	3	1	0	0	2	3	1	0	0
		Column N %	4%	4%	6%	0%	0%	9%	7%	33%	0%	0%
	Free-time package tour	Count	18	13	2	0	5	4	8	1	2	3
		Column N %	18%	19%	13%	0%	28%	17%	18%	33%	29%	13%
	Individually arranged travel (FIT)	Count	75	51	13	1	12	17	33	1	5	20
		Column N %	74%	74%	81%	100%	67%	74%	73%	33%	71%	83%
	Other	Count	4	2	0	0	1	0	1	0	0	1
		Column N %	4%	3%	0%	0%	6%	0%	2%	0%	0%	4%
	Total	Count	101	69	16	1	18	23	45	3	7	24

TRAVEL MOTIVATION - SEGMENTATION

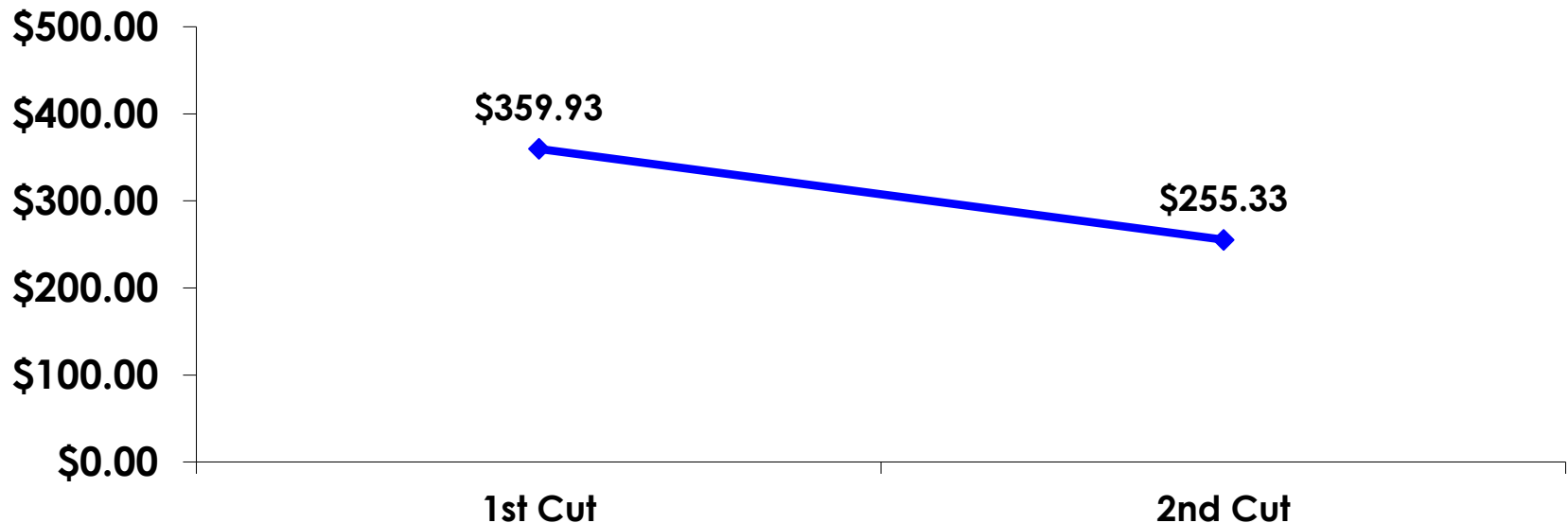
		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	18%	17%	19%	100%	20%	14%	23%	0%	29%	16%
	Price	17%	18%	25%	0%	10%	9%	9%	0%	29%	16%
	Visit friends/ Relatives	38%	37%	13%	50%	45%	36%	43%	67%	14%	24%
	Recomm- friend/family/trvl agnt	19%	21%	19%	0%	20%	14%	17%	0%	29%	12%
	Scuba	4%	3%	13%	50%	0%	5%	6%	33%	14%	4%
	Water sports	5%	6%	6%	0%	10%	5%	4%	33%	14%	0%
	Short travel time	21%	30%	25%	50%	20%	23%	23%	33%	29%	8%
	Golf	1%	1%	6%	0%	0%	5%	2%	33%	0%	0%
	Relax	54%	80%	63%	0%	65%	55%	55%	67%	29%	52%
	Company/ Business Trip	3%	1%	0%	100%	5%	0%	6%	0%	0%	4%
	Company Sponsored	2%	0%	0%	100%	5%	0%	4%	0%	0%	4%
	Convention/ Trade/ Conference	2%	1%	6%	50%	0%	5%	4%	33%	0%	4%
	Safe	34%	39%	38%	100%	30%	14%	32%	33%	71%	36%
	Natural beauty	48%	54%	69%	100%	55%	59%	43%	100%	86%	44%
	Shopping	55%	63%	50%	50%	55%	55%	51%	67%	71%	52%
	Married/ Attn wedding	1%	1%	0%	0%	0%	5%	0%	33%	0%	0%
	Honeymoon	2%	3%	6%	0%	5%	5%	4%	67%	0%	0%
	Pleasure	38%	56%	25%	0%	50%	41%	43%	100%	43%	24%
	Organized sports	2%	3%	6%	0%	5%	5%	2%	33%	0%	0%
	Other	9%	8%	0%	0%	10%	9%	13%	0%	0%	8%
Total	Count	105	71	16	2	20	22	47	3	7	25

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	82%	90%	100%	50%	100%	96%	81%	100%	86%	72%
	Friend/ Relative	61%	65%	63%	50%	55%	78%	60%	67%	86%	56%
	Prior Trip	31%	27%	25%	100%	15%	39%	31%	67%	29%	20%
	Magazine (Consumer)	15%	14%	31%	0%	10%	4%	17%	0%	43%	12%
	TV	15%	18%	25%	0%	0%	22%	10%	33%	29%	8%
	Newspaper	11%	13%	13%	0%	5%	17%	8%	67%	14%	12%
	Travel Agent Brochure	8%	10%	25%	0%	10%	0%	8%	0%	43%	0%
	Travel Guidebook- Bookstore	7%	6%	6%	0%	10%	4%	2%	0%	43%	12%
	Co-Worker/ Company Trvl Dept	7%	7%	13%	50%	10%	9%	6%	33%	0%	0%
	GVB Office	6%	4%	6%	0%	5%	9%	0%	0%	0%	12%
	GVB Promo	6%	4%	6%	0%	5%	4%	4%	0%	0%	16%
	Travel Trade Show	4%	4%	6%	0%	0%	0%	2%	0%	14%	0%
	Consumer Trvl Show	3%	4%	0%	0%	0%	4%	0%	0%	0%	0%
	Other	1%	1%	0%	0%	0%	4%	0%	0%	0%	4%
	Theater Ad	1%	0%	0%	0%	0%	0%	0%	0%	14%	4%
	Radio	1%	1%	6%	0%	0%	4%	2%	33%	0%	0%
	Total	Count	107	71	16	2	20	23	48	3	7	25

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES PER PERSON - SEGMENTATION



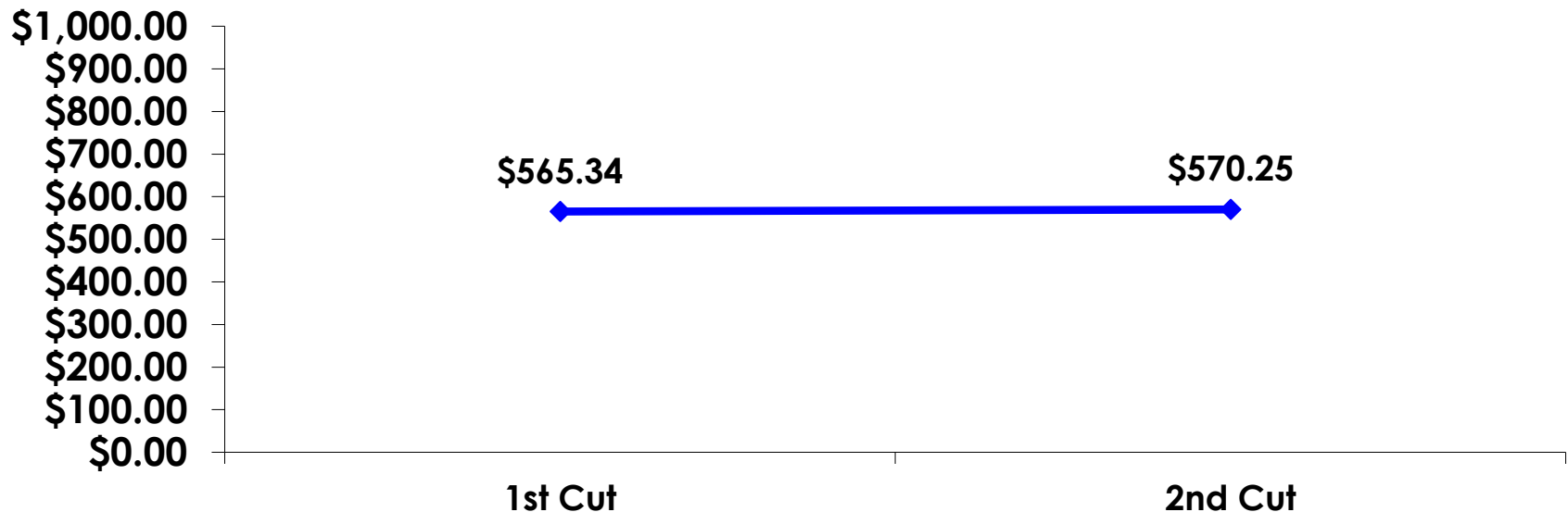
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$255.33	\$282.11	\$197.33	\$220.18	\$264.00	\$239.61	\$295.60	\$226.55	\$343.88	\$226.74
	Median	\$192	\$235	\$191	\$220	\$257	\$214	\$257	\$273	\$248	\$90
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$86	\$0	\$0
	Maximum	\$1,283	\$1,283	\$855	\$440	\$1,005	\$855	\$1,283	\$321	\$1,005	\$1,283

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	\$668.76	\$679.71	\$555.79	.	\$716.12	\$583.23	\$827.55	.	\$737.49	\$483.97
	Median	\$502	\$470	\$556	.	\$716	\$305	\$556	.	\$737	\$321
AIR/ HOTEL/ MEAL	Mean	\$737.24	\$616.93	\$1,218.47	.	.	.	\$1,154.34	.	.	\$1,282.60
	Median	\$962	\$588	\$1,218	.	.	.	\$1,218	.	.	\$1,283
AIR ONLY	Mean	\$342.61	\$348.55	\$560.37	.	\$240.41	\$363.78	\$318.50	\$350.51	\$534.42	\$514.75
	Median	\$278	\$278	\$545	.	\$192	\$278	\$267	\$351	\$534	\$433
HOTEL ONLY	Mean	\$446.47	\$497.63	\$732.15	.	\$451.96	\$226.95	\$341.27	\$213.77	.	\$462.44
	Median	\$321	\$353	\$620	.	\$214	\$152	\$214	\$214	.	\$462
HOTEL & MEAL	Mean	\$224.45	.	.	\$427.53	\$21.38	.	\$224.45	.	.	\$427.53
	Median	\$224	.	.	\$428	\$21	.	\$224	.	.	\$428
F&B HOTEL	Mean	\$320.65	.	.	.	.	.	.	.	.	.
	Median	\$321	.	.	.	.	.	.	.	.	.
TRANS- PHILIPPINES	Mean	\$40.56	\$39.01	\$46.42	\$12.83	\$64.13	\$11.22	\$38.77	.	\$42.75	\$17.10
	Median	\$21	\$21	\$21	\$13	\$64	\$11	\$21	.	\$43	\$17
TRANS- GUAM	Mean	\$165.88	\$165.88	.	.	\$106.88	\$342.03	\$213.77	.	.	\$342.03
	Median	\$160	\$160	.	.	\$107	\$342	\$214	.	.	\$342
OPT TOURS	Mean	\$10.69	\$10.69	.	.	.	\$10.69	.	.	.	.
	Median	\$11	\$11	.	.	.	\$11	.	.	.	.
OTHER	Mean	\$342.80	\$166.07	\$887.13	.	.	\$379.01	\$154.55	\$171.01	\$301.56	\$10.69
	Median	\$139	\$96	\$887	.	.	\$86	\$86	\$171	\$302	\$11
TOTAL	Mean	\$432.94	\$493.31	\$670.29	\$220.18	\$398.89	\$448.48	\$497.51	\$361.94	\$379.33	\$341.21
	Median	\$278	\$321	\$572	\$220	\$257	\$257	\$321	\$273	\$496	\$90

ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION



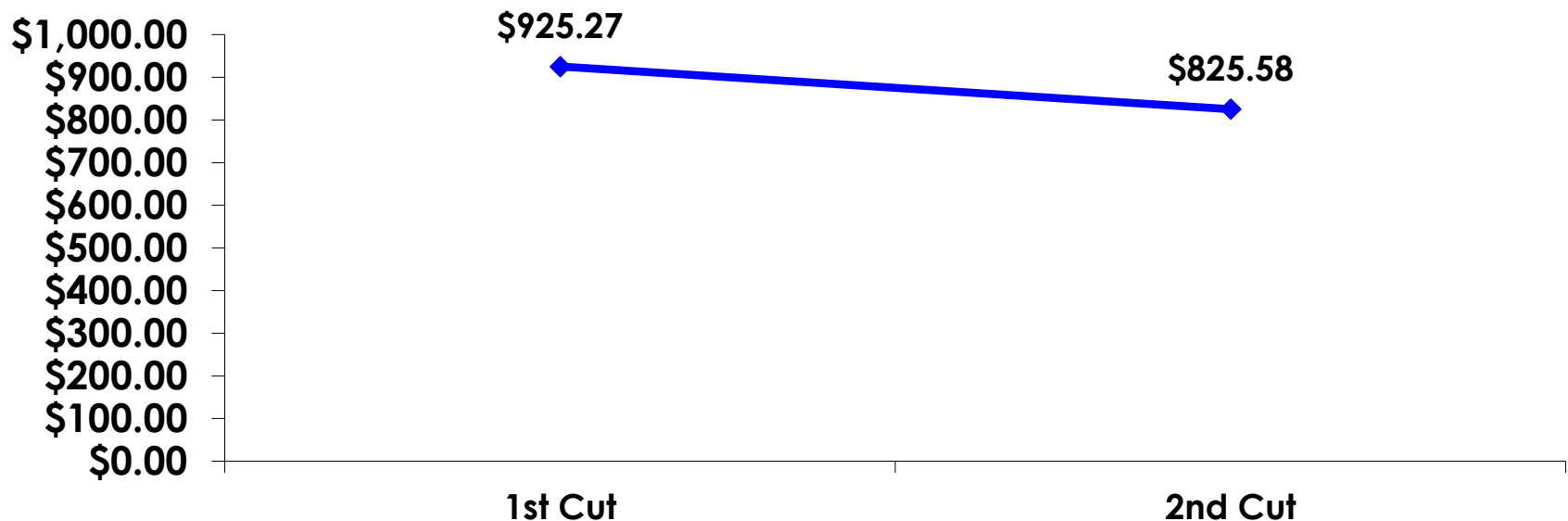
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$570.25	\$578.53	\$463.15	\$1,775.00	\$478.25	\$731.59	\$699.17	\$983.33	\$542.43	\$575.49
	Median	\$450	\$480	\$433	\$1,775	\$465	\$500	\$497	\$750	\$660	\$300
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$700	\$206	\$0
	Maximum	\$3,550	\$3,100	\$1,500	\$3,550	\$1,200	\$3,100	\$3,550	\$1,500	\$1,000	\$3,550

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	\$17.45	\$15.07	\$8.13	\$30.00	\$35.00	\$13.04	\$22.85	\$33.33	\$10.00	\$5.48
F&B FF/STORE	Mean	\$107.22	\$142.25	\$276.88	\$20.00	\$41.00	\$72.17	\$149.85	\$33.33	\$81.43	\$102.52
F&B RESTRNT	Mean	\$66.36	\$70.85	\$86.25	\$200.00	\$99.50	\$61.96	\$54.90	\$200.00	\$15.71	\$33.00
OPT TOUR	Mean	\$25.50	\$23.23	\$31.25	\$0.00	\$16.40	\$16.22	\$26.65	\$0.00	\$21.43	\$11.00
GIFT- SELF	Mean	\$186.80	\$204.82	\$244.06	\$1,250.00	\$180.60	\$174.35	\$184.00	\$300.00	\$68.71	\$188.84
GIFT- OTHER	Mean	\$158.16	\$172.37	\$154.69	\$250.00	\$152.65	\$138.48	\$197.15	\$300.00	\$157.14	\$139.00
TRANS	Mean	\$60.31	\$66.70	\$97.81	\$25.00	\$47.00	\$50.87	\$61.37	\$0.00	\$66.00	\$31.88
OTHER	Mean	\$268.76	\$255.94	\$283.13	\$0.00	\$104.85	\$506.96	\$438.90	\$1,100.00	\$294.29	\$342.12
TOTAL	Mean	\$890.57	\$951.23	\$1,182.19	\$1,775.00	\$677.00	\$1,034.04	\$1,135.67	\$1,966.67	\$714.71	\$853.84

TOTAL EXPENDITURES PER PERSON - SEGMENTATION



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	\$825.58	\$860.64	\$660.48	\$1,995.18	\$742.25	\$971.20	\$994.78	\$1,209.88	\$886.31	\$802.23
	Median	\$696	\$757	\$733	\$1,995	\$753	\$757	\$811	\$1,021	\$784	\$621
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$836	\$231	\$0
	Maximum	\$3,990	\$3,570	\$1,555	\$3,990	\$1,705	\$3,570	\$3,990	\$1,773	\$1,705	\$3,990

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 ($p \leq .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Comparison of Drivers of Overall Satisfaction, Oct 15-Jun 16, Jul-Sep 16 and Overall 2016			
	Oct15-Jun 16	Jul-Sep 16	Combine d 2016
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks			
Ease of getting around	1		2
Safety walking around at night			
Quality of daytime tours			
Variety of daytime tours			
Quality of nighttime tours		2	
Variety of nighttime tours			
Quality of shopping			
Variety of shopping	3		
Price of things on Guam			
Quality of hotel accommodations	4		3
Quality/cleanliness of air, sky	2		4
Quality/cleanliness of parks			
Quality of landscape in Tumon			
Quality of landscape in Guam			
Quality of ground handler			
Quality/cleanliness of transportation vehicles		1	1
% of Per Person On Island Expenditures Accounted For	71.5%	61.0%	66.4%

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Filipino visitor's experience on Guam is driven by two significant factors in the July to September 2016 Period. By rank order they are:
 - **Quality/cleanliness of transportation vehicles, and**
 - **Quality of nighttime tours.**
- With these factors the overall r^2 is .61 meaning that **61.0% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On Island Expenditure, Oct 15 - Jun 16, Jul -Sep 16 and Overall 2016			
	Oct15- Jun 16	Jul-Sep 16	Combine d 2016
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks		1	
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%	8.7%	0.0%

Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** of Filipino visitors on Guam is driven by one significant factor in the July-September 2016 Period. It is:
 - **Quality & cleanliness of beaches and parks.**
- With this factor the overall r^2 is .087 meaning that **8.7% of Per Person On Island Expenditure is accounted for by this factor.**