

Guam Visitors Bureau

Philippine Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

QTR.1 (OCTOBER – DECEMBER 2016)

Prepared by: Anthology Research

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Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Filipino speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **101** 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 **101** is +/- 9.80 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 +/- 9.80 percentage points.

Objectives

- To monitor the effectiveness of the Filipino 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 Philippines marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

Key Highlighted Segments

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

Key Highlighted Segments

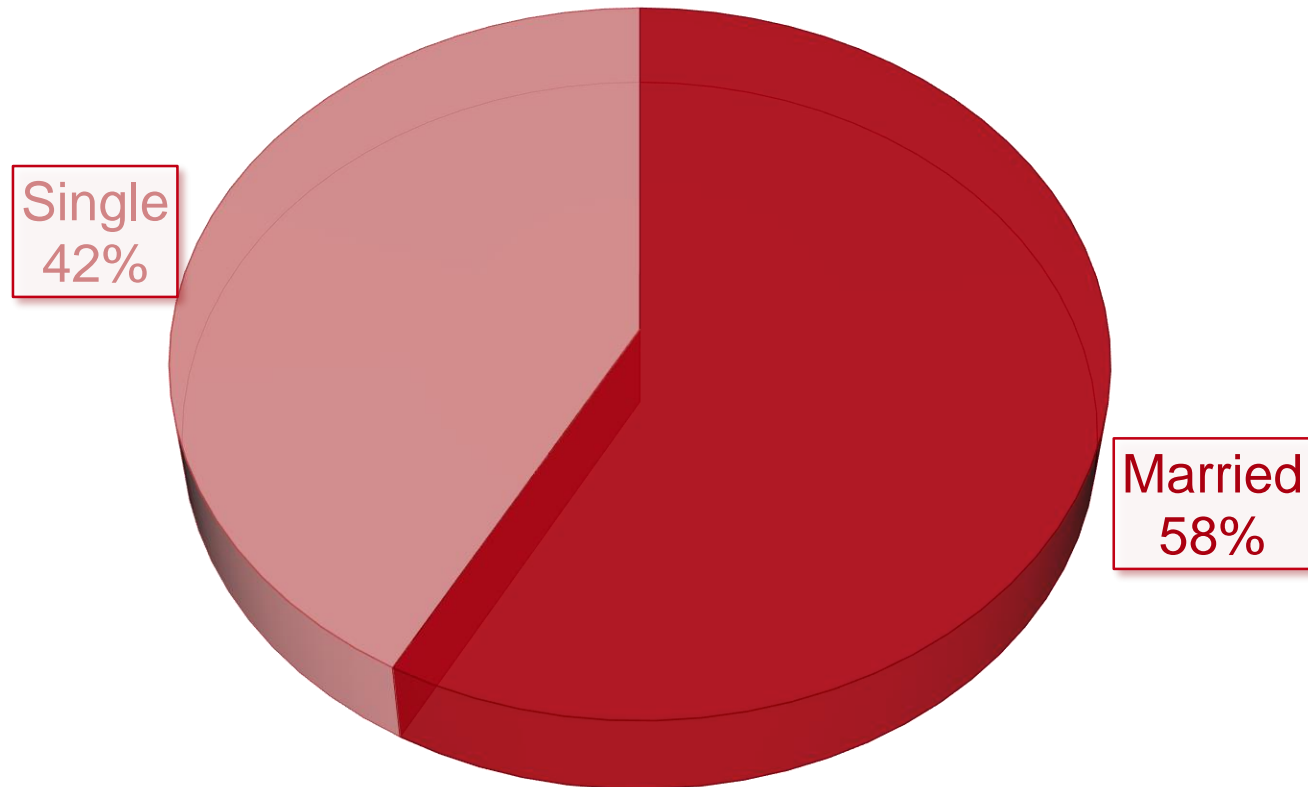


	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
<div><div></div>FITs</div>	66%			
<div><div></div>Leisure Trvl</div>	69%			
<div><div></div>Family</div>	58%			
<div><div></div>MICE</div>				

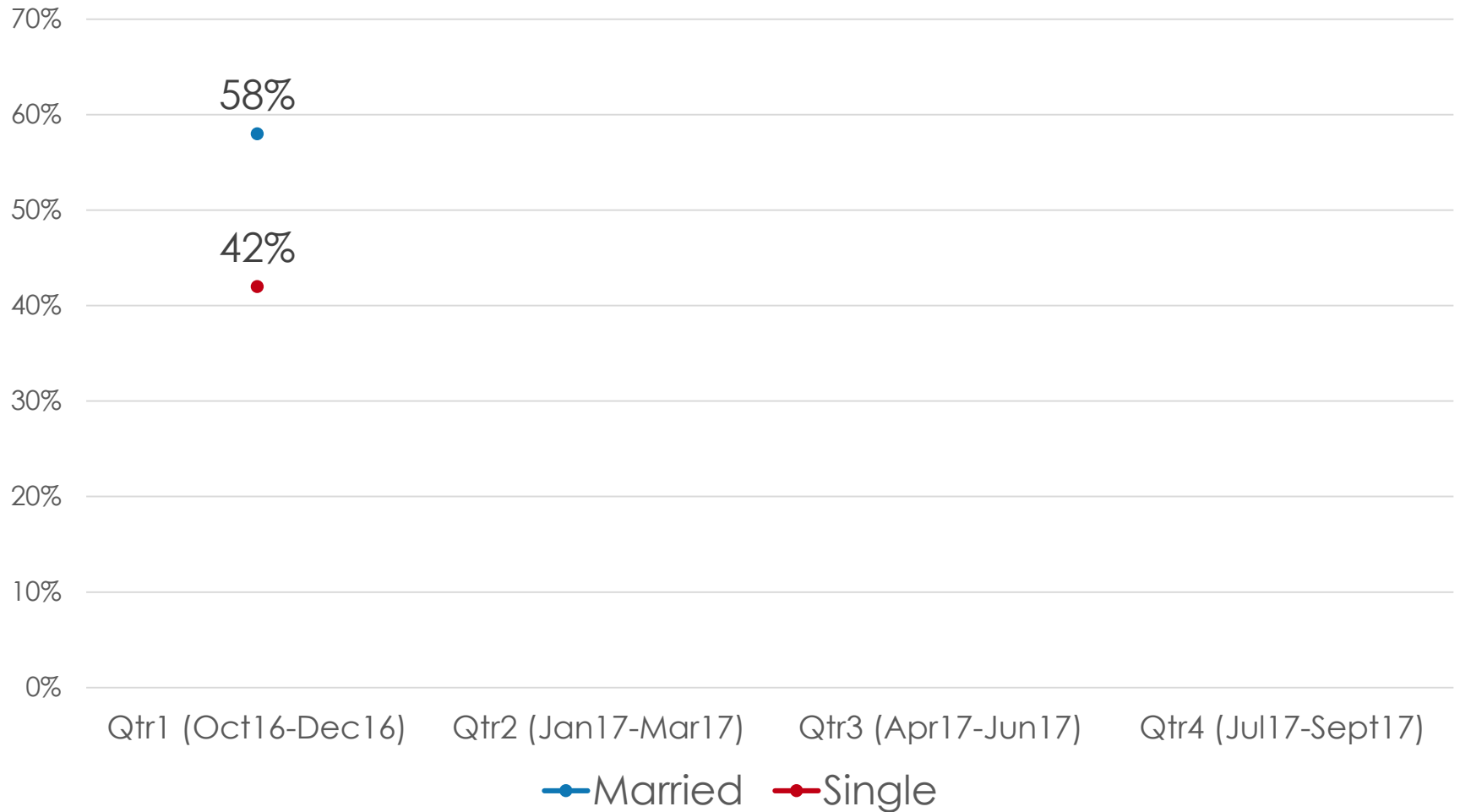
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2017 Tracking



Marital status – Key Segments

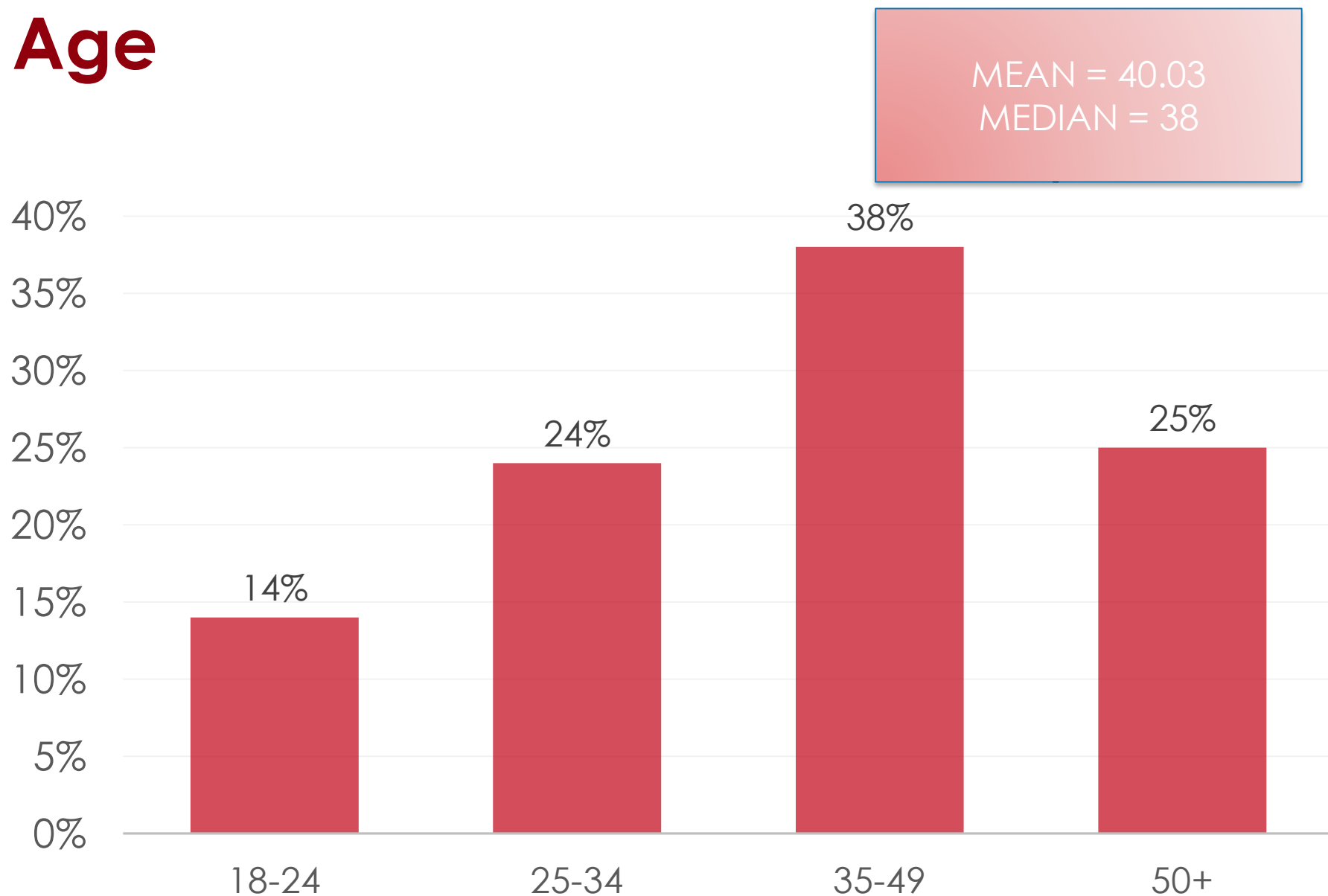
GUAM VISITORS BUREAU - EXIT SURVEY

QE Are you married or single?

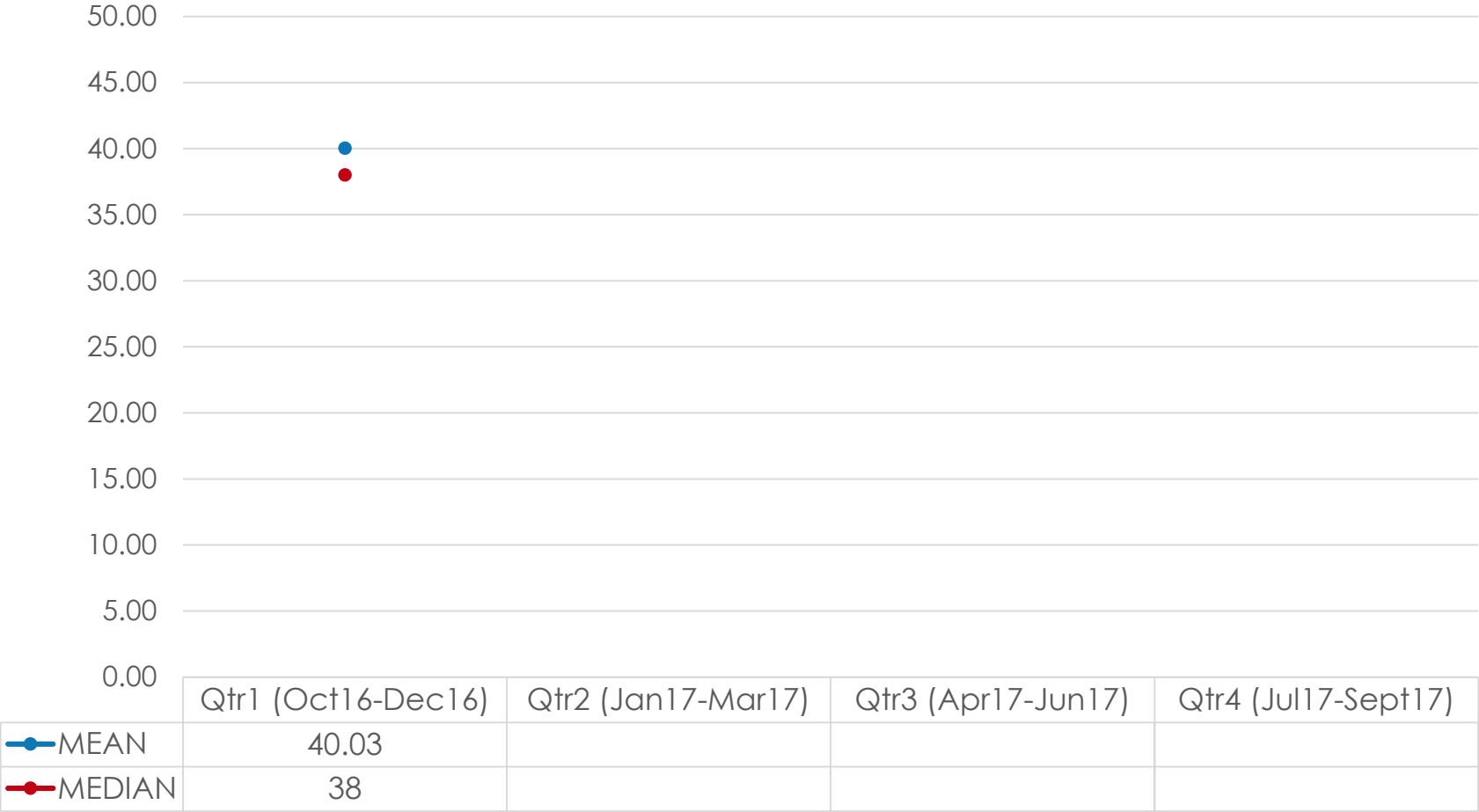
		TOTAL	FAMILY	FIT	LEISURE
		-	-	-	-
qe	Married	58%	74%	56%	55%
	Single	42%	26%	44%	45%
	Total	100	58	66	69

Prepared by QMark Research

Age



Age – FY2017 Tracking



Age – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

QF And what was your age on your last birthday?

		TOTAL	FAMILY	FIT	LEISURE
		-	-	-	-
QF	18-24	14%	8%	16%	11%
	25-34	24%	19%	18%	26%
	35-49	38%	46%	37%	41%
	50+	25%	27%	28%	21%
	Total	101	59	67	70
qf	Mean	40.03	41.29	41.03	39.20
	Median	38	40	40	37

Prepared by QMark Research

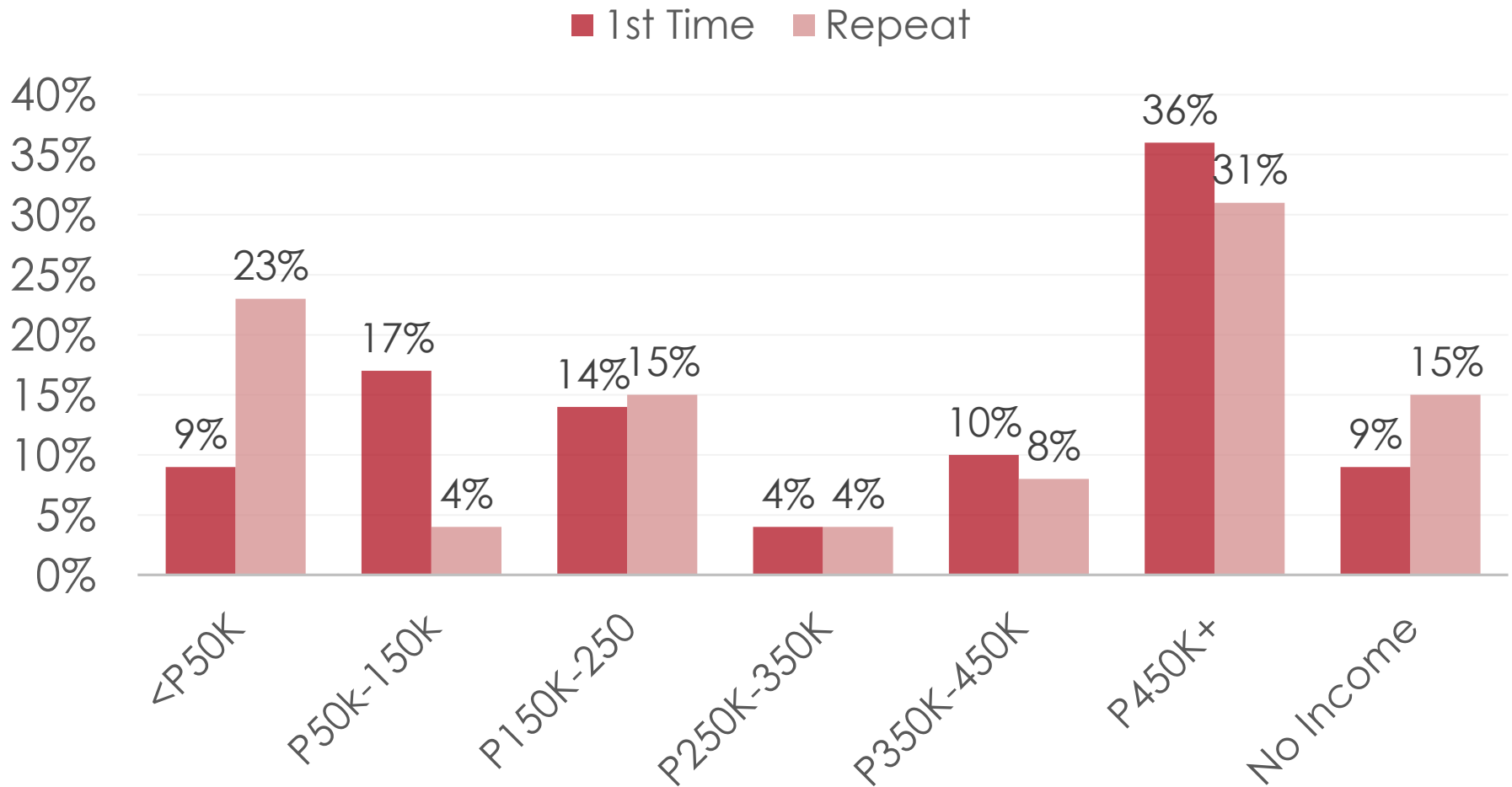
Annual Household Income

EXCHANGE RATE Peso 49.38=\$1



Annual Household Income

EXCHANGE RATE Peso 49.38=\$1



Annual Household Income – Key Segments

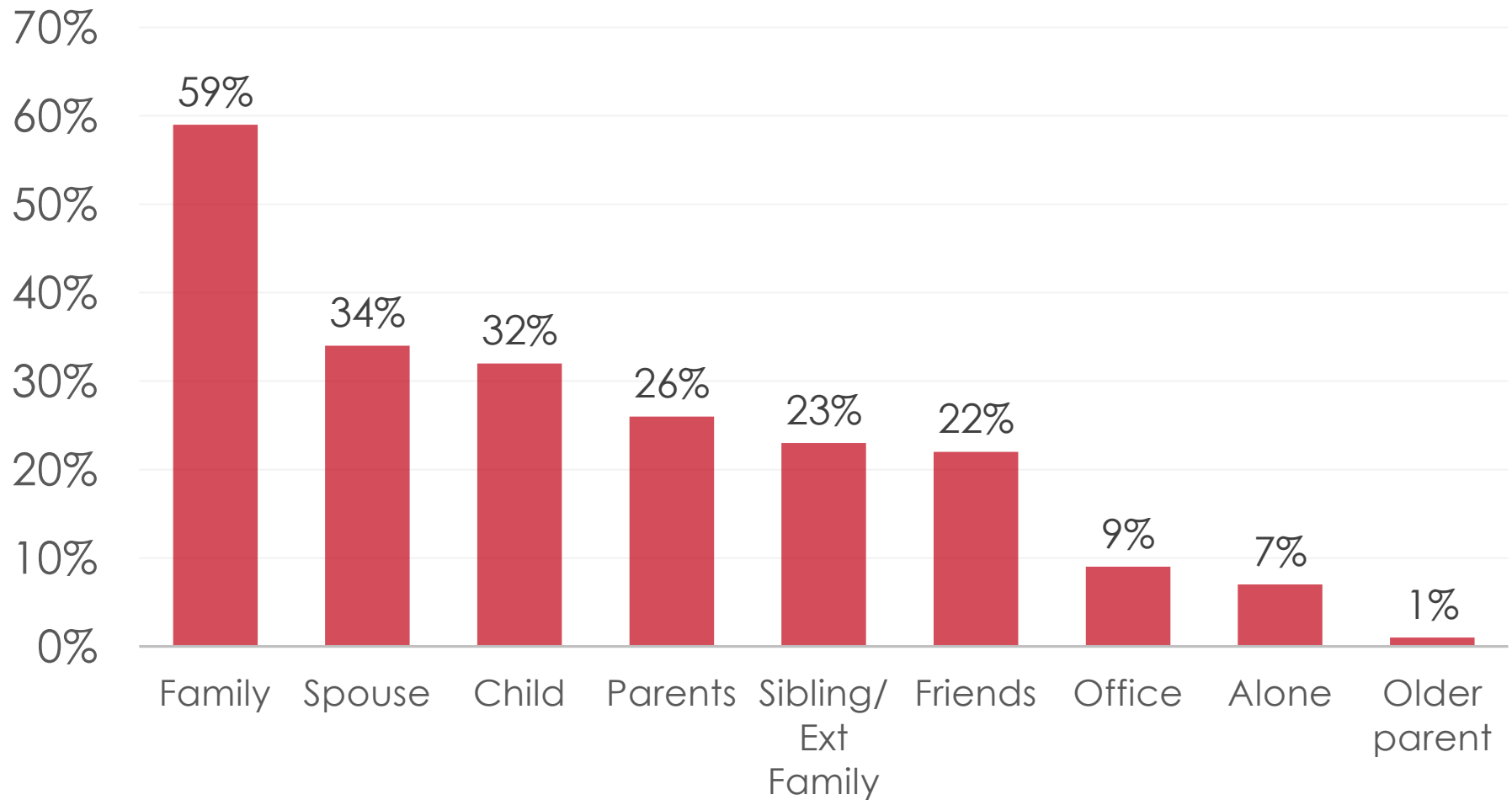
GUAM VISITORS BUREAU - EXIT SURVEY

QF And what was your age on your last birthday?

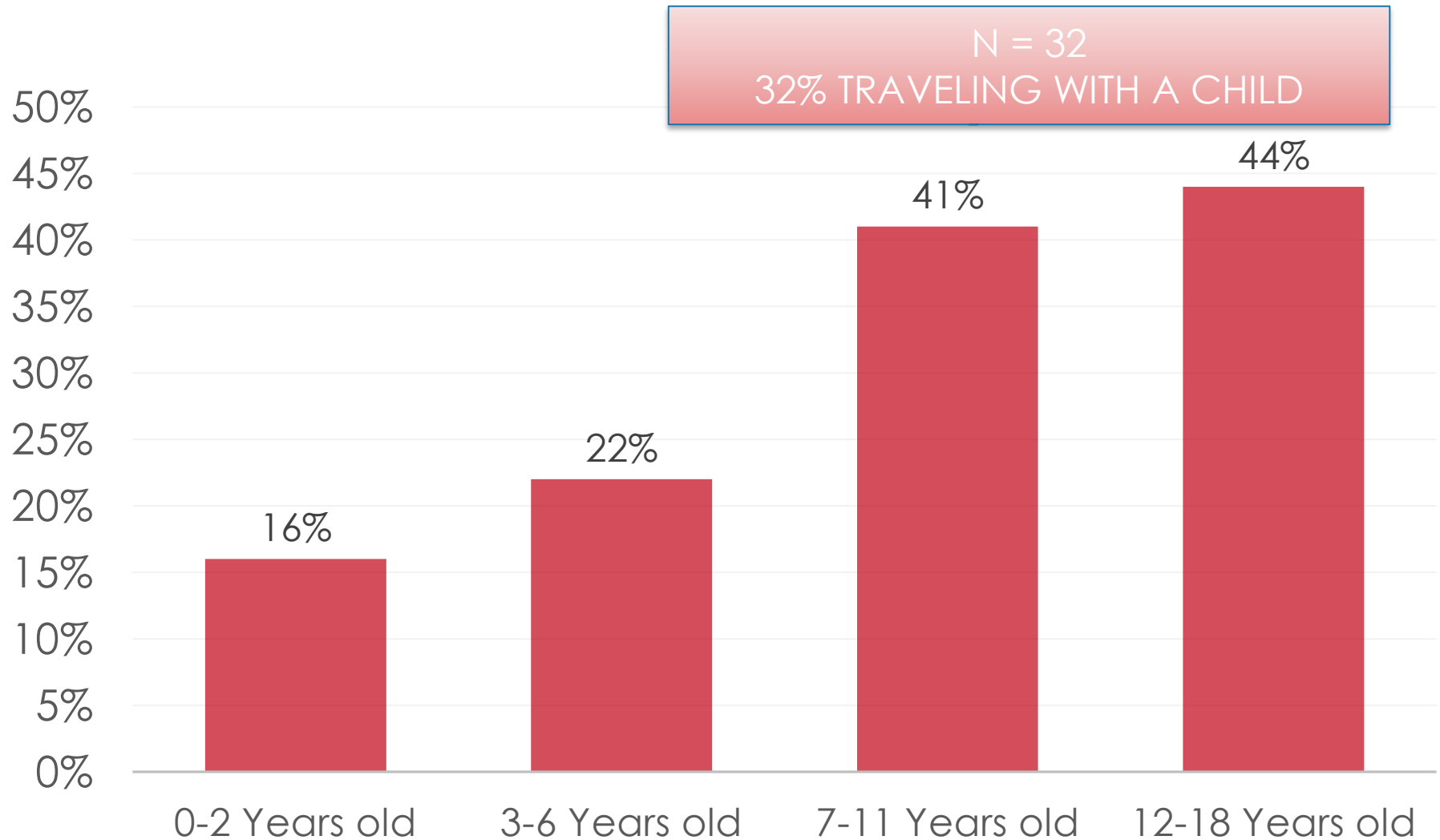
		TOTAL	FAMILY	FIT	LEISURE
		-	-	-	-
QF	18-24	14%	8%	16%	11%
	25-34	24%	19%	18%	26%
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	50+	25%	27%	28%	21%
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Prepared by QMark Research

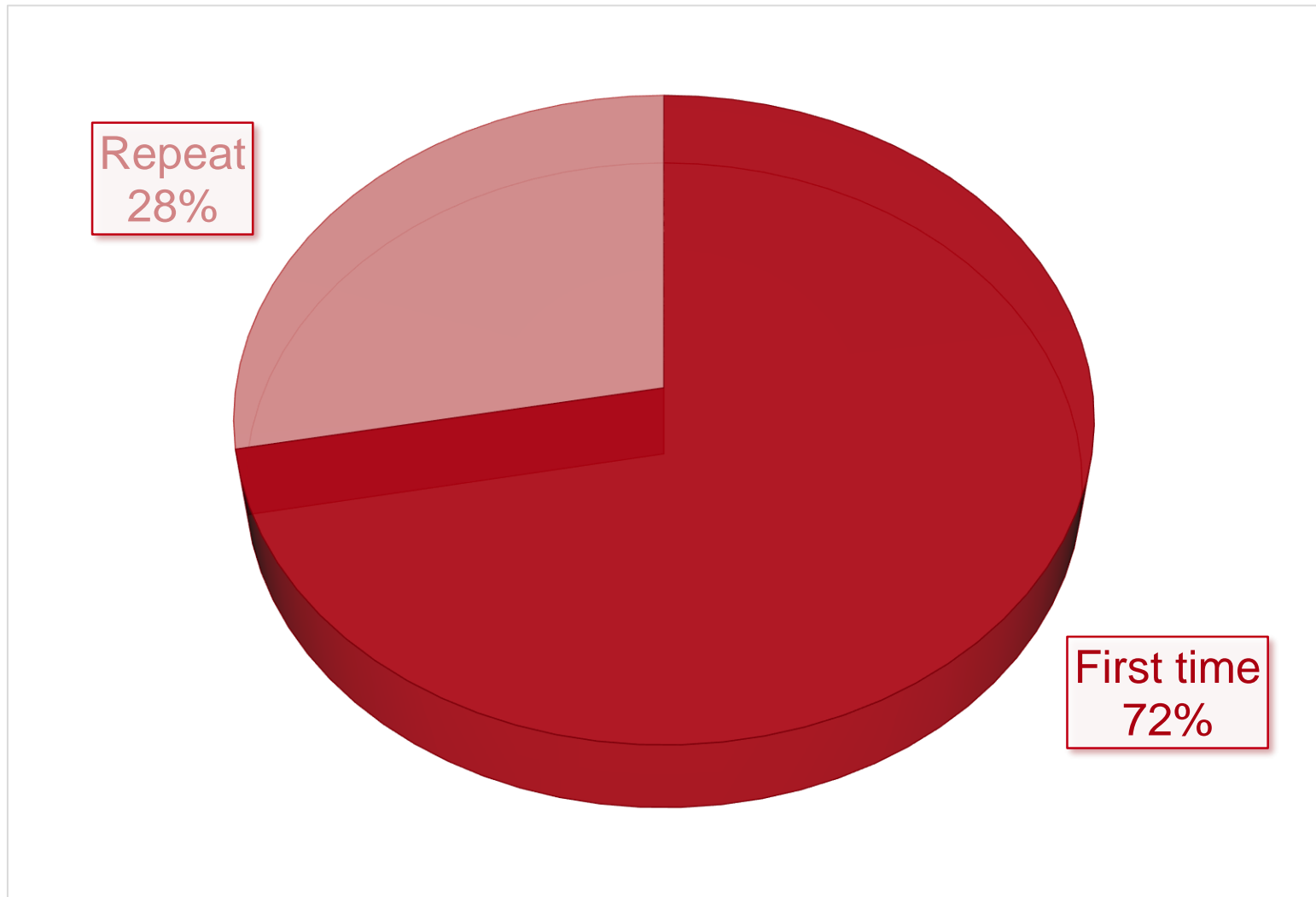
Travel Party



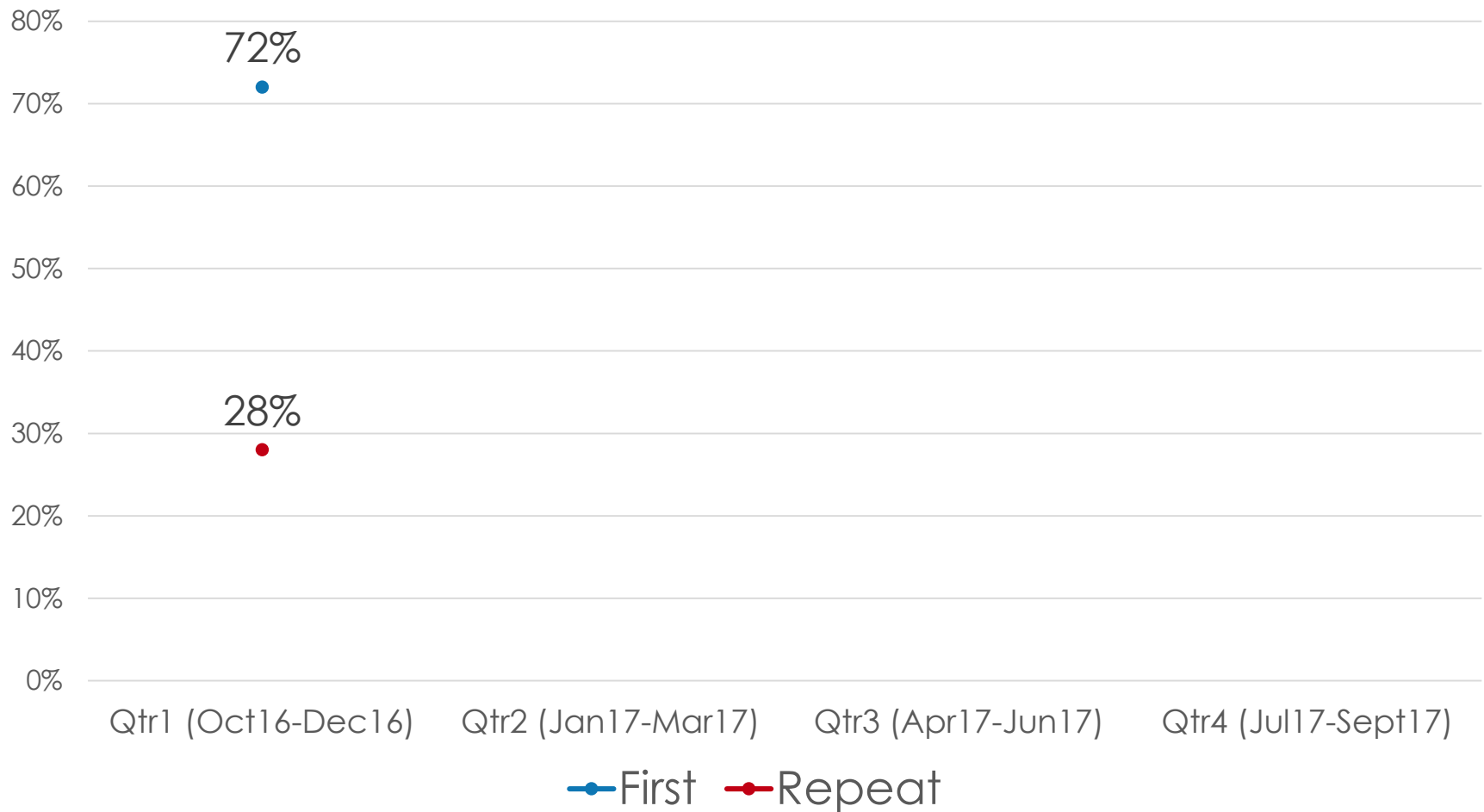
Travel Party - Children



Trips to Guam



Trips to Guam – FY2017 Tracking



Trips to Guam – Key Segments

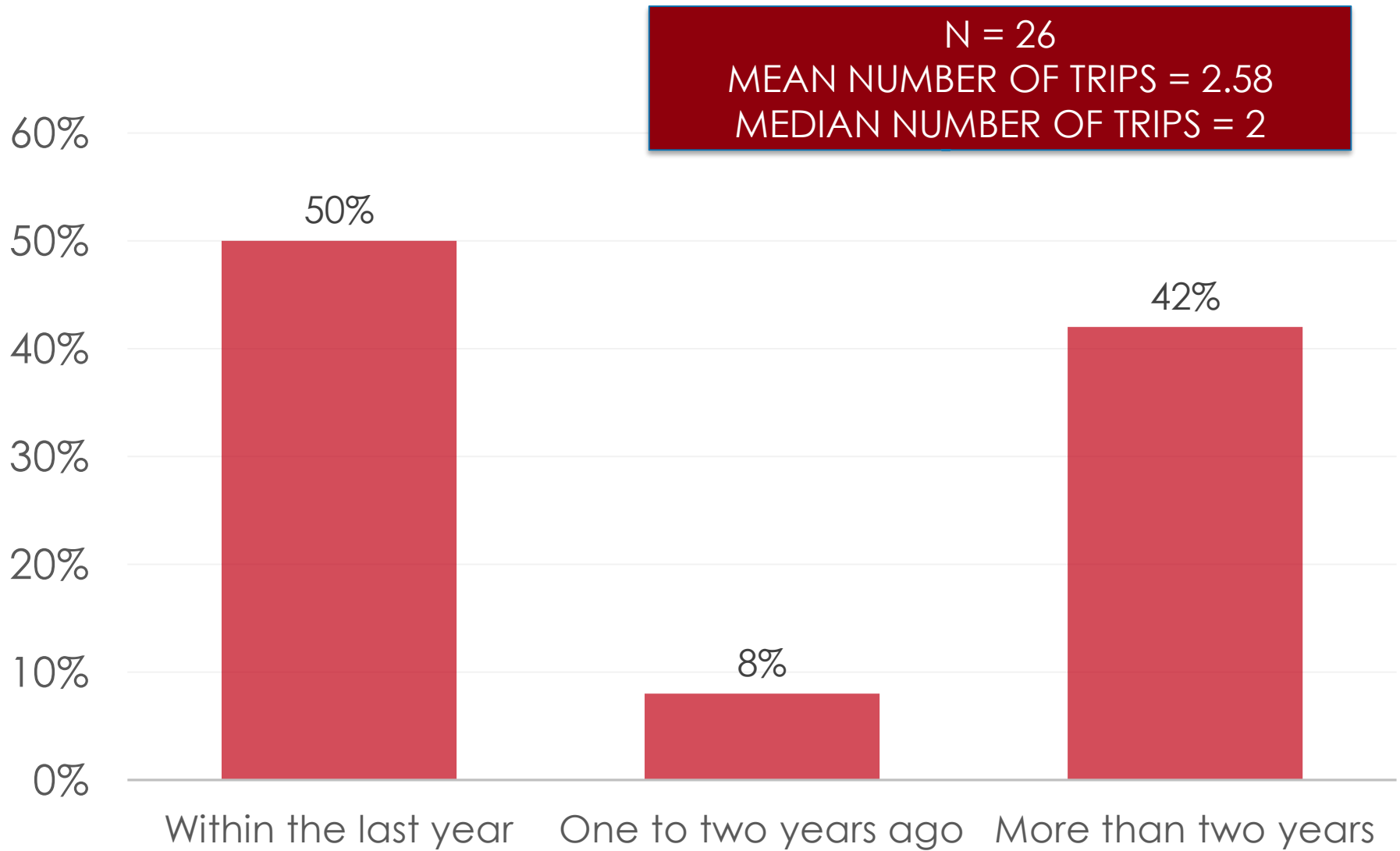
GUAM VISITORS BUREAU - EXIT SURVEY

Q3A Is this your first trip to Guam?

		TOTAL	FAMILY	FIT	LEISURE
		-	-	-	-
Q3A	Yes	72%	67%	70%	77%
	No	28%	33%	30%	23%
	Total	97	55	64	70

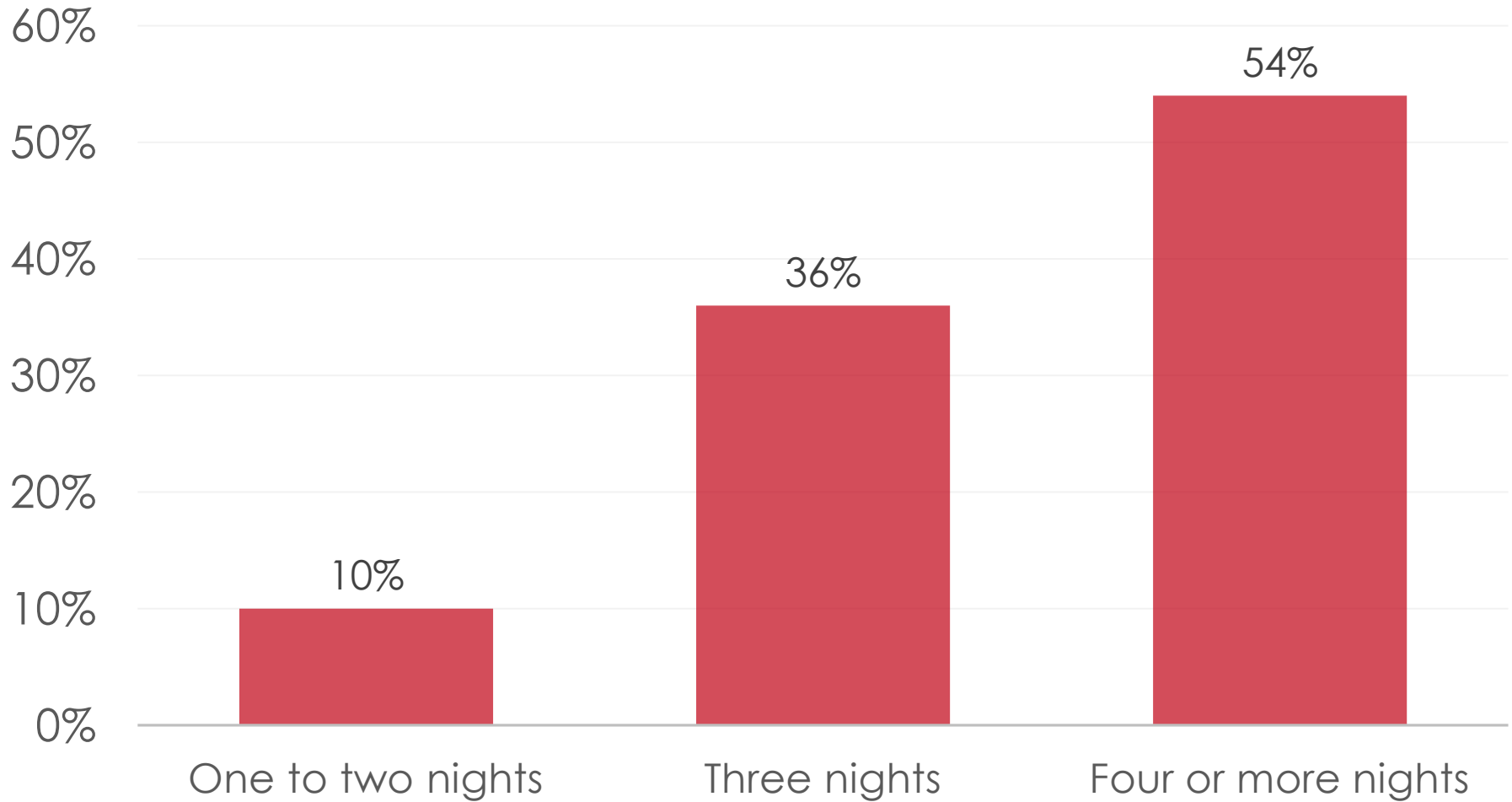
Prepared by QMark Research

Repeat Visitor- Most Recent Trip

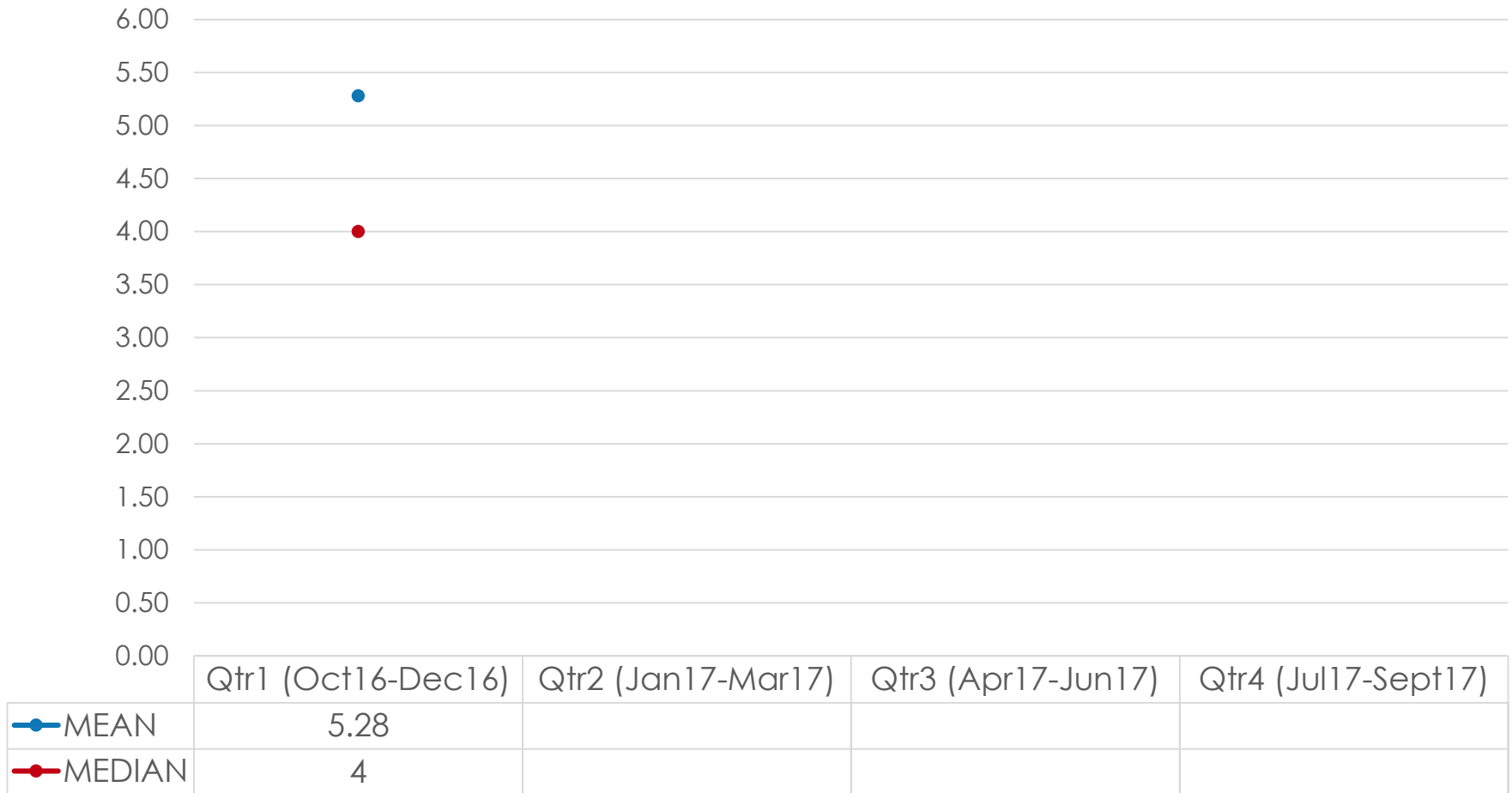


Length of Stay

MEAN NUMBER OF NIGHTS = 5.28
MEDIAN NUMBER OF NIGHTS = 4



Length of Stay – FY2017 Tracking



Length of Stay – Key Segments

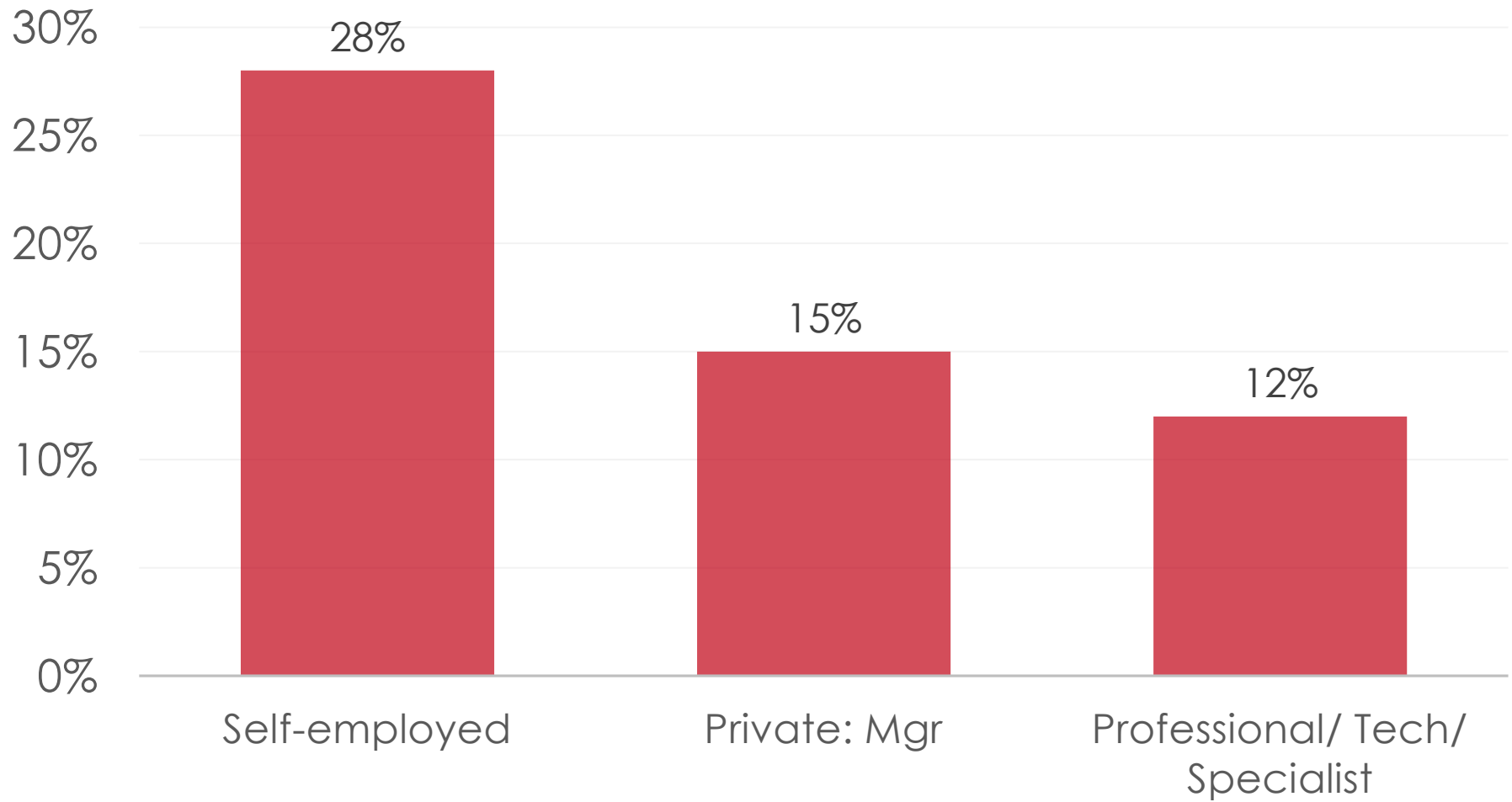
GUAM VISITORS BUREAU - EXIT SURVEY

Q8 How many nights did you stay on Guam?

		TOTAL	FAMILY	FIT	LEISURE
		-	-	-	-
Q8	1-2	10%	10%	12%	6%
	3	36%	34%	37%	37%
	4+	54%	55%	51%	57%
	Total	100	58	67	70
Q8	Mean	5.28	4.47	5.27	5.60
	Median	4	4	4	4

Prepared by QMark Research

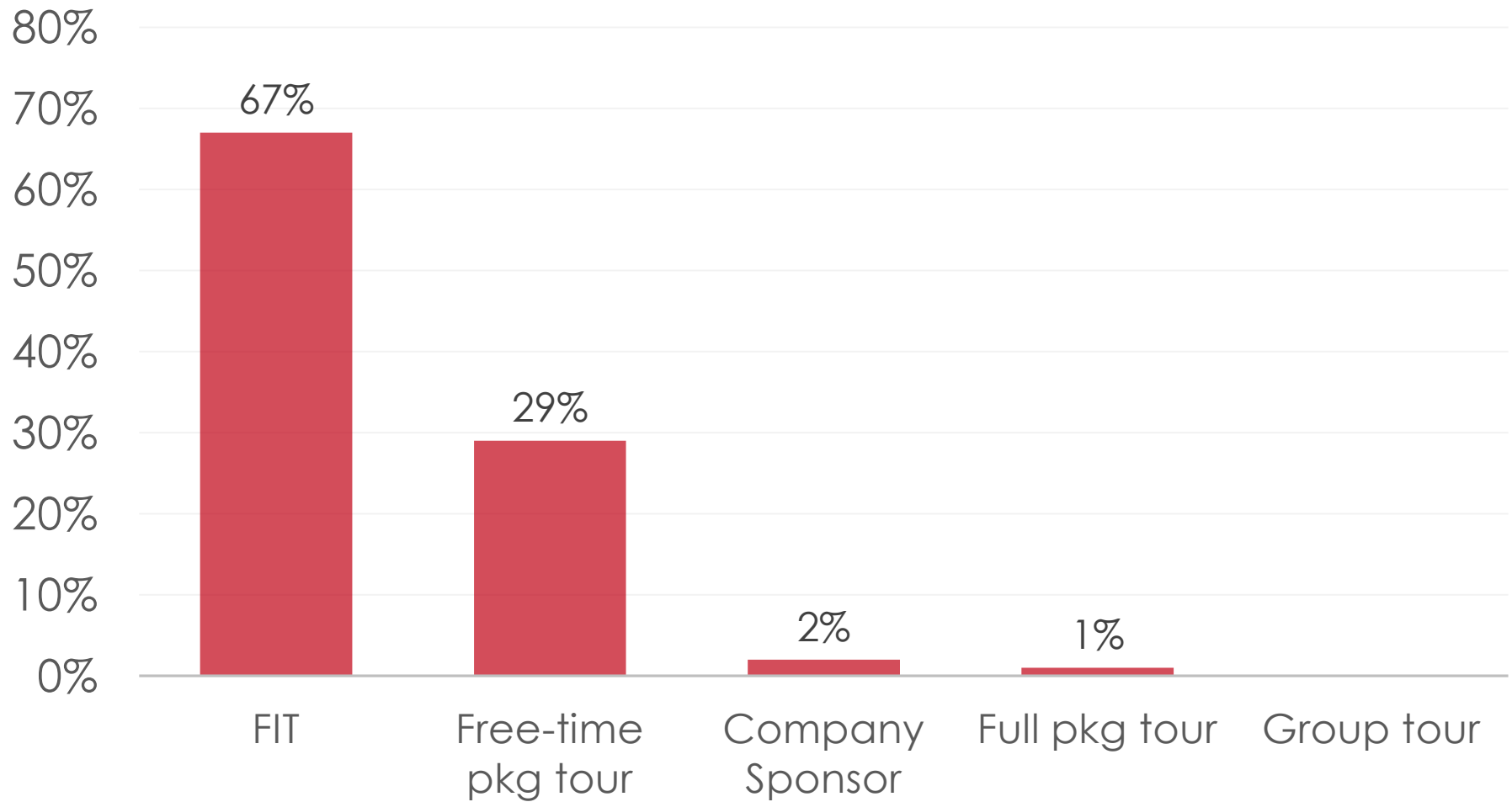
Occupation – Top Responses (10%+)



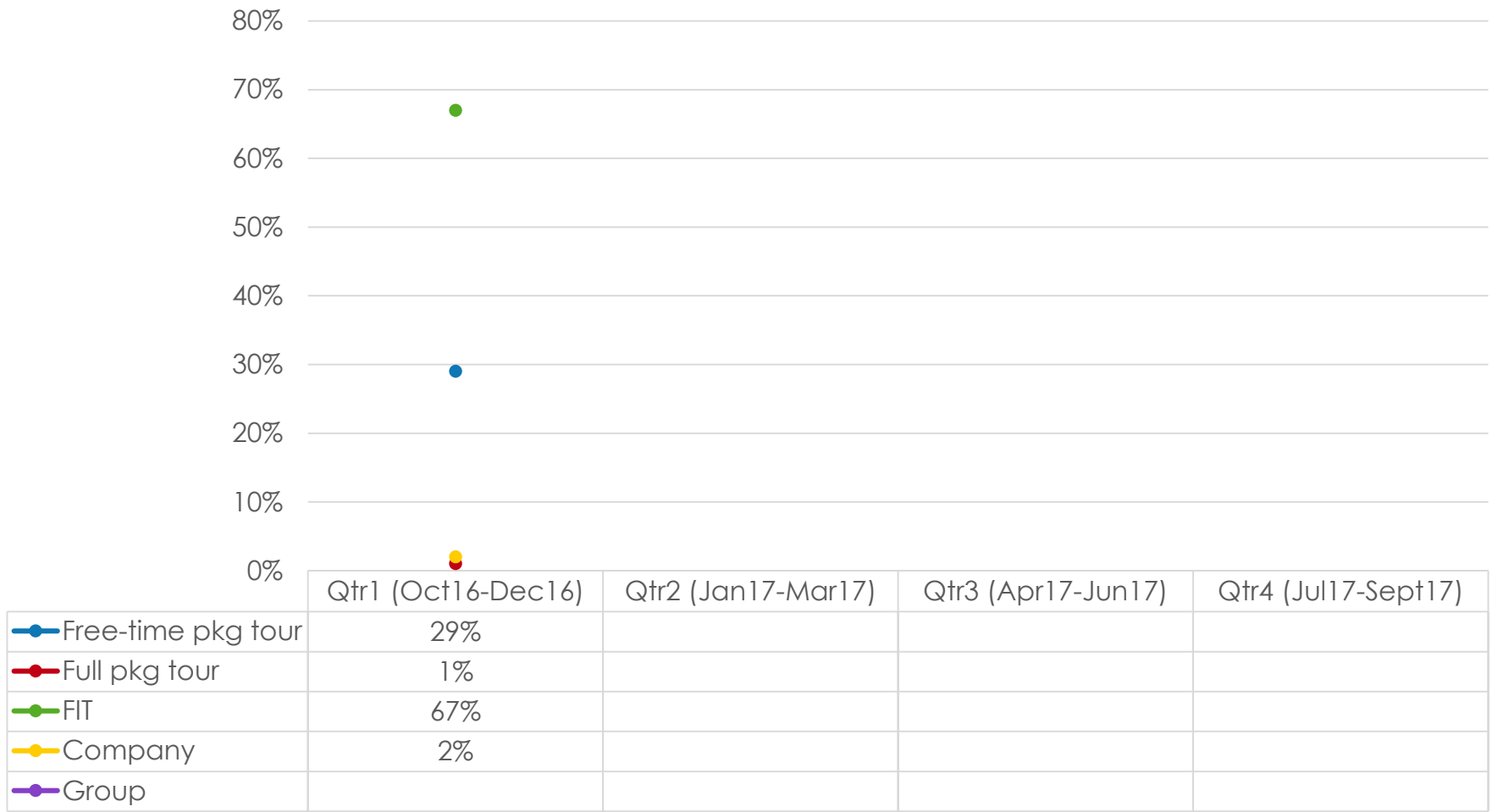
SECTION 2

TRAVEL PLANNING

Travel Planning



Travel Planning – FY2017 Tracking



Travel Planning – Key Segments

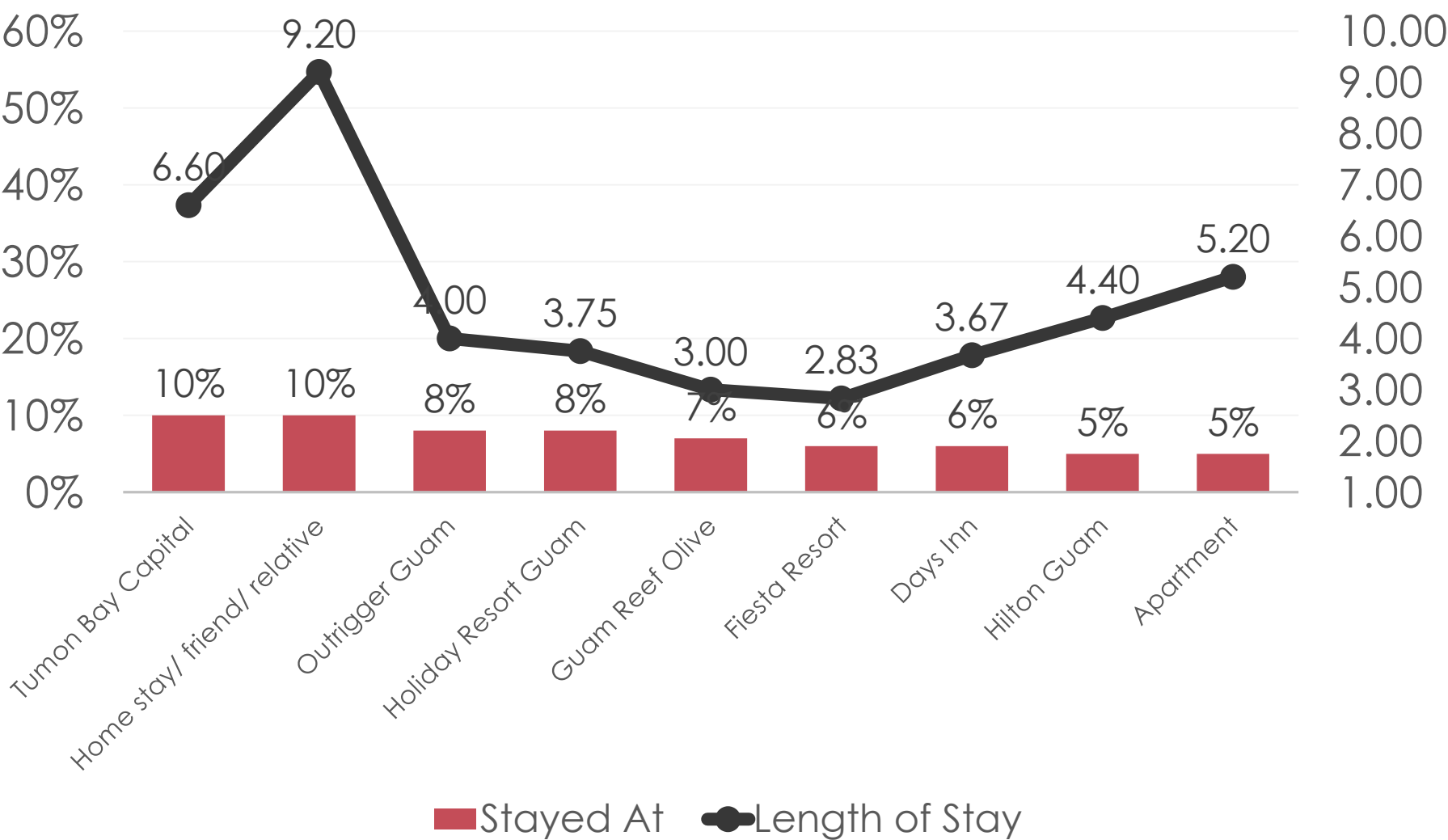
GUAM VISITORS BUREAU - EXIT SURVEY

Q7 Please describe your travel arrangements to Guam?

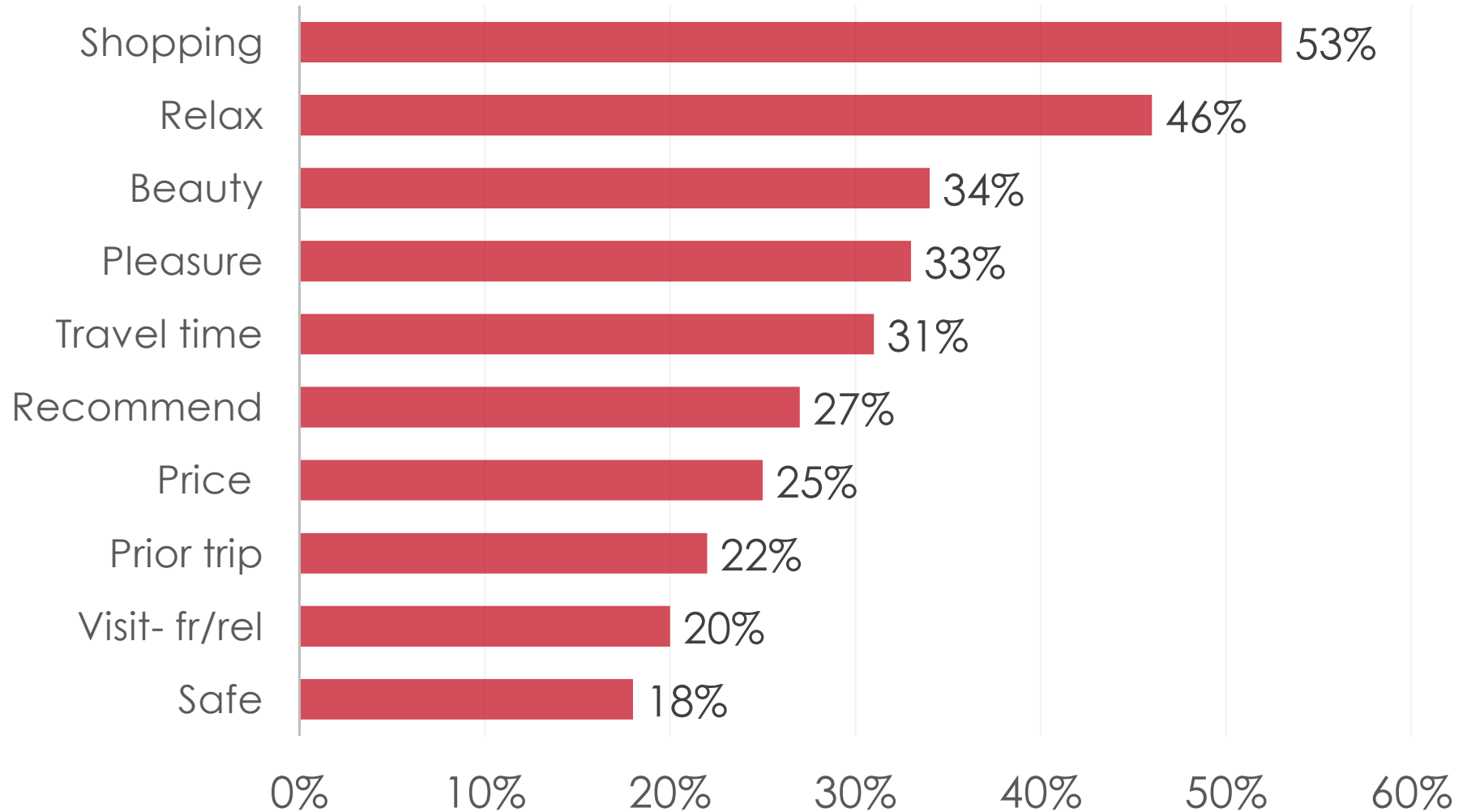
		TOTAL	FAMILY	FIT	LEISURE
		-	-	-	-
Q7	Individually arranged travel (FIT)	67%	73%	100%	70%
	Free-time package tour	29%	24%		28%
	Company paid travel	2%	2%		1%
	Other	1%			
	Full package tour	1%	2%		1%
	Total	100	59	67	69

Prepared by QMark Research

Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q5A Please select the top 3 reasons that motivated you to travel to Guam?

		TOTAL	FAMILY	FIT	LEISURE
		-	-	-	-
Q5A	Shopping	53%	49%	48%	50%
	Relax	46%	51%	50%	64%
	Natural beauty	34%	36%	36%	47%
	Pleasure	33%	27%	33%	46%
	Short travel time	31%	31%	30%	29%
	Recomm- friend/family/trvl agnt	27%	24%	27%	24%
	Price	25%	27%	23%	23%
	Previous trip	22%	25%	23%	17%
	Visit friends/ Relatives	20%	20%	25%	13%
	Safe	18%	20%	20%	16%
	Other	6%	11%	8%	4%
	Company/ Business Trip	3%		3%	3%
	Water sports	3%	5%	2%	1%
	Organized sports	2%	4%	2%	3%
	Scuba	2%	4%	2%	1%
	Total	97	55	64	70

Prepared by QMark Research

SECTION 3

EXPENDITURES

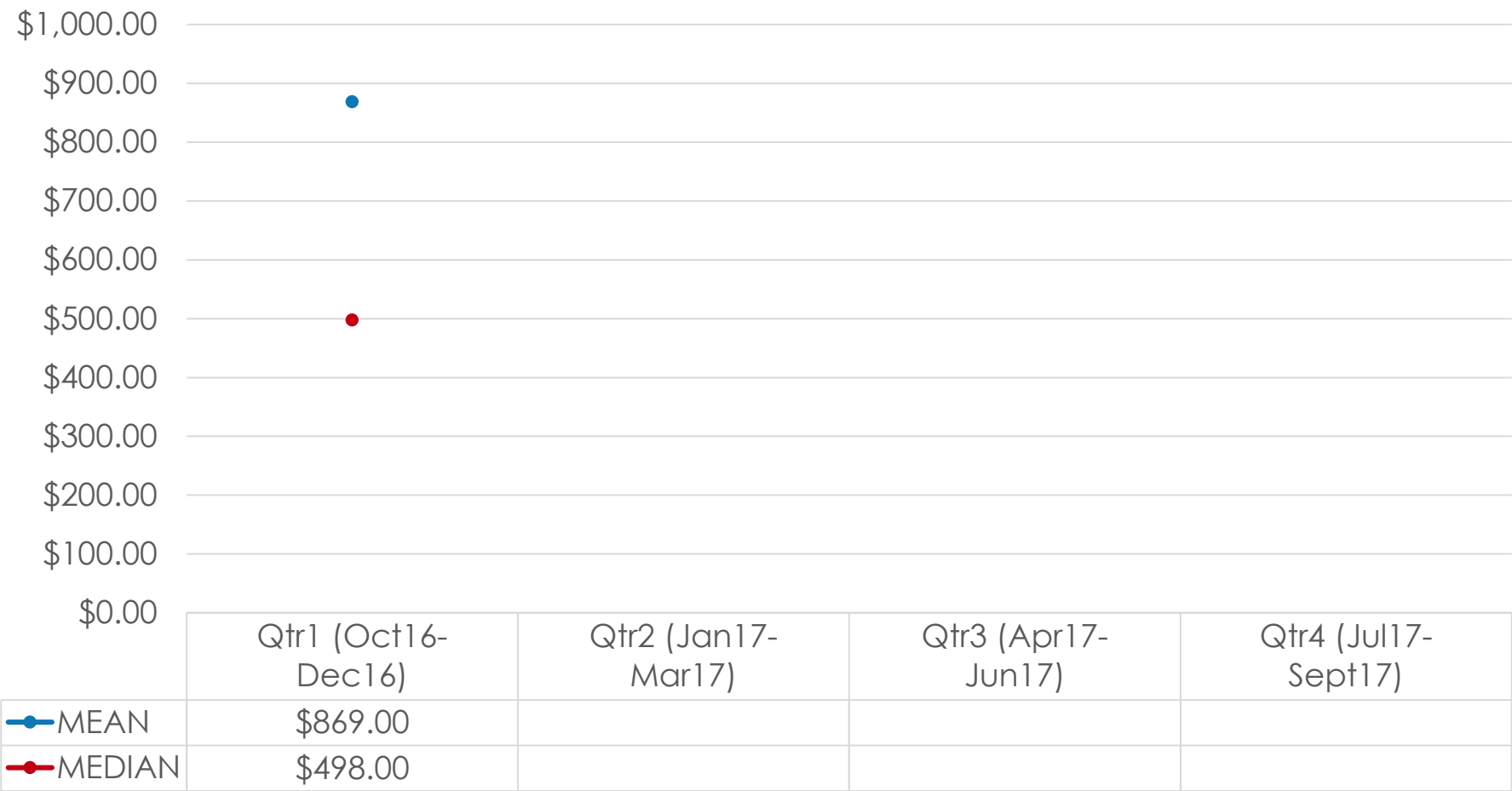
Prepaid Expenditures

EXCHANGE RATE Peso 49.38=\$1

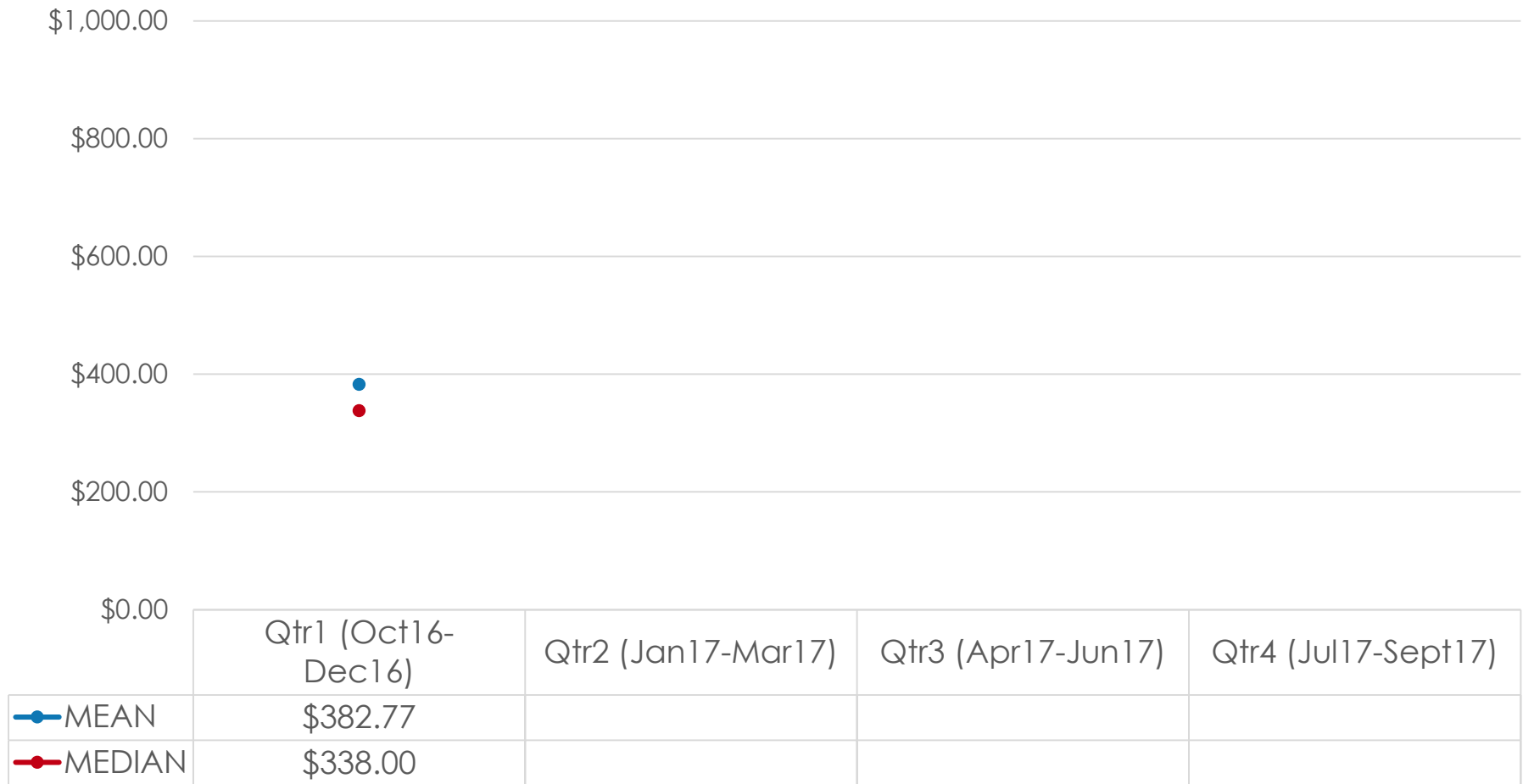
- \$869.00 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$382.77 = overall mean average per person prepaid expenditures

Prepaid Entire Travel Party – FY2017

Tracking



Prepaid Per Person– FY2017 Tracking



Prepaid Per Person– Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

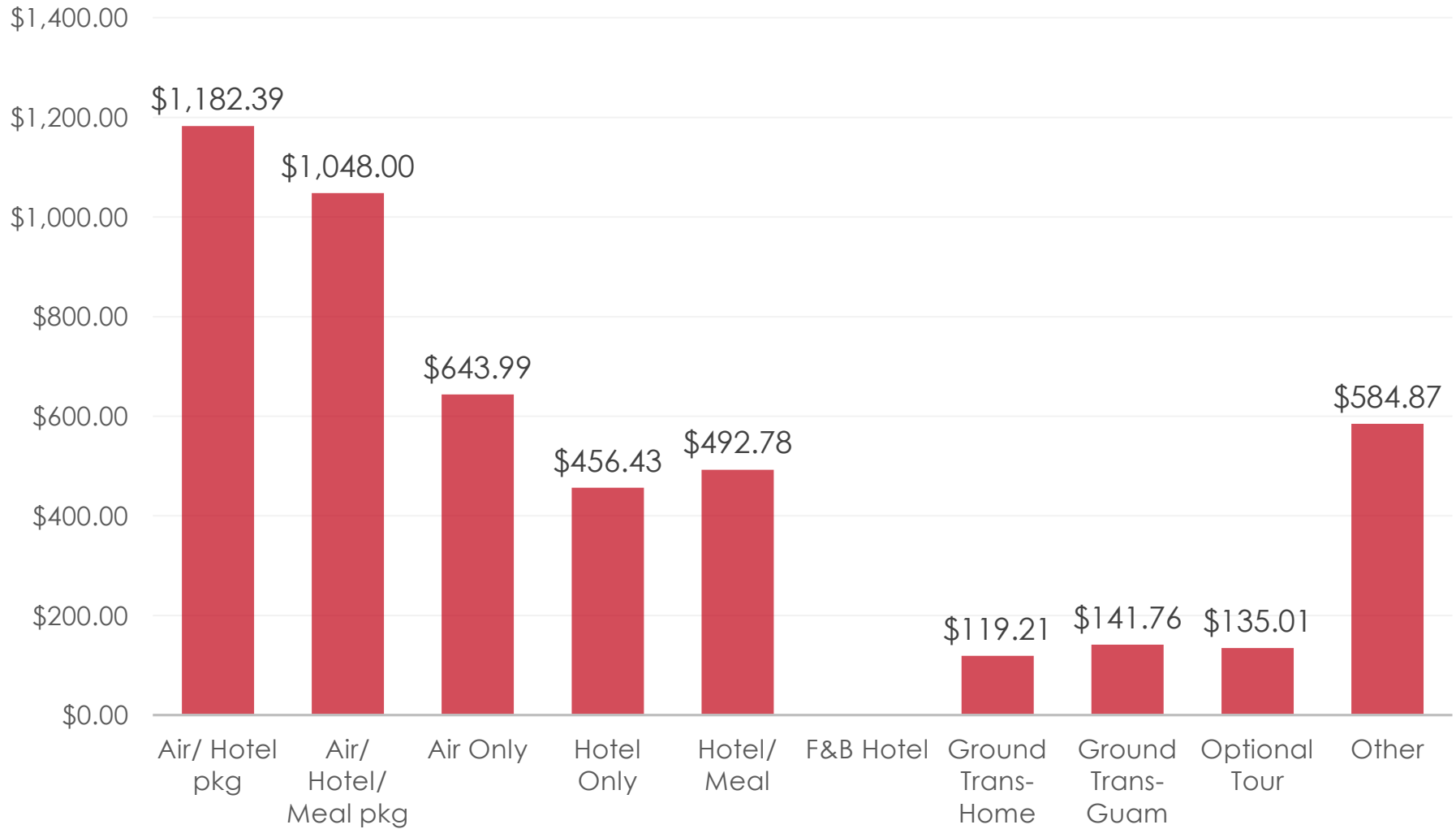
Q10A How much did you pay in KOREA before coming to Guam for the tour package, your airfare, lodging meals, and transportation?

PER PERSON

		TOTAL	FAMILY	FIT	LEISURE
		-	-	-	-
PER PERSON	Mean	\$382.77	\$392.14	\$373.75	\$429.48
	Median	\$338	\$395	\$304	\$400

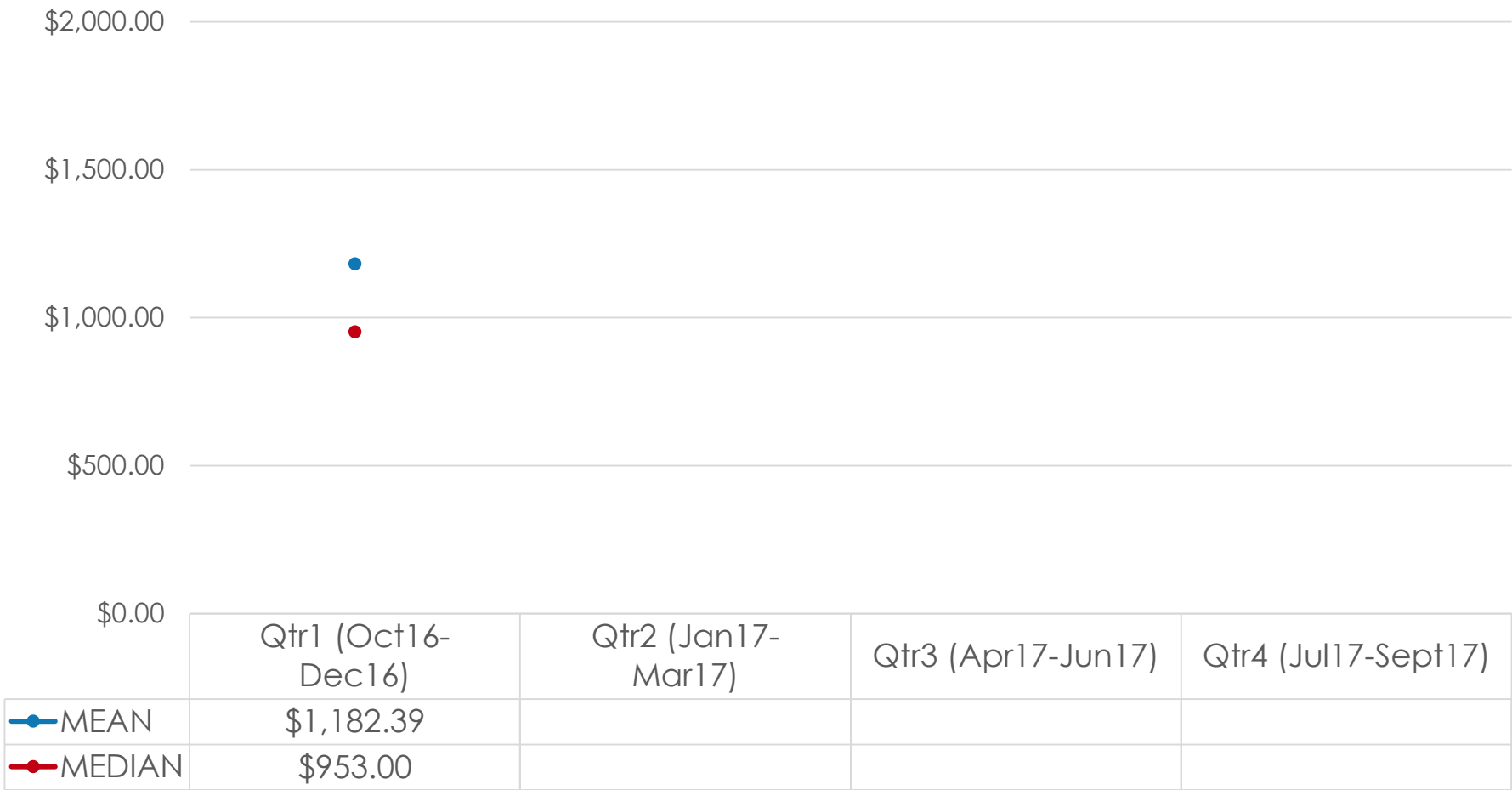
Prepared by QMark Research

Prepaid Expenses by Category – MEAN Entire Travel Party



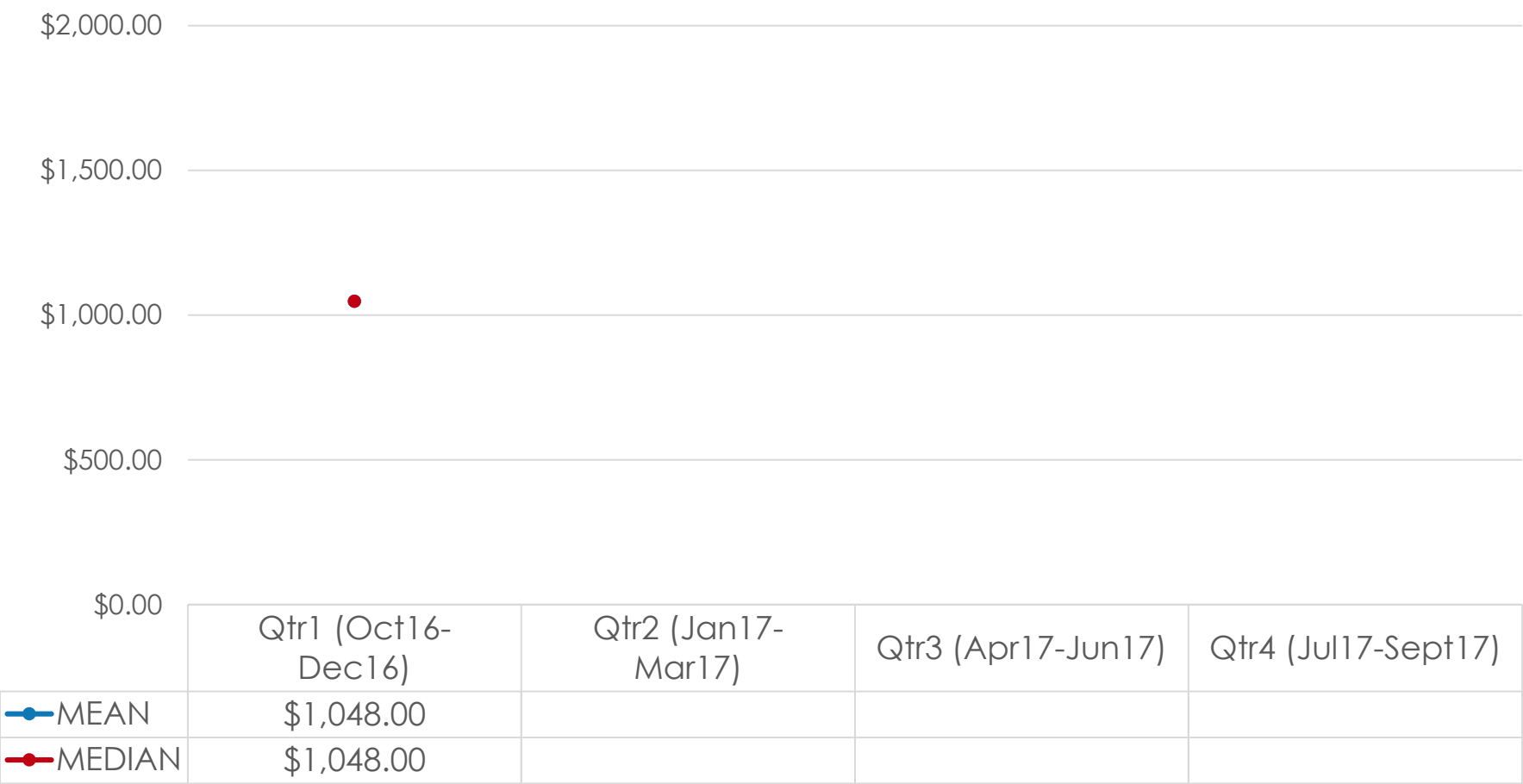
Prepaid– FY2017 Tracking

Airfare & Accommodation Packages



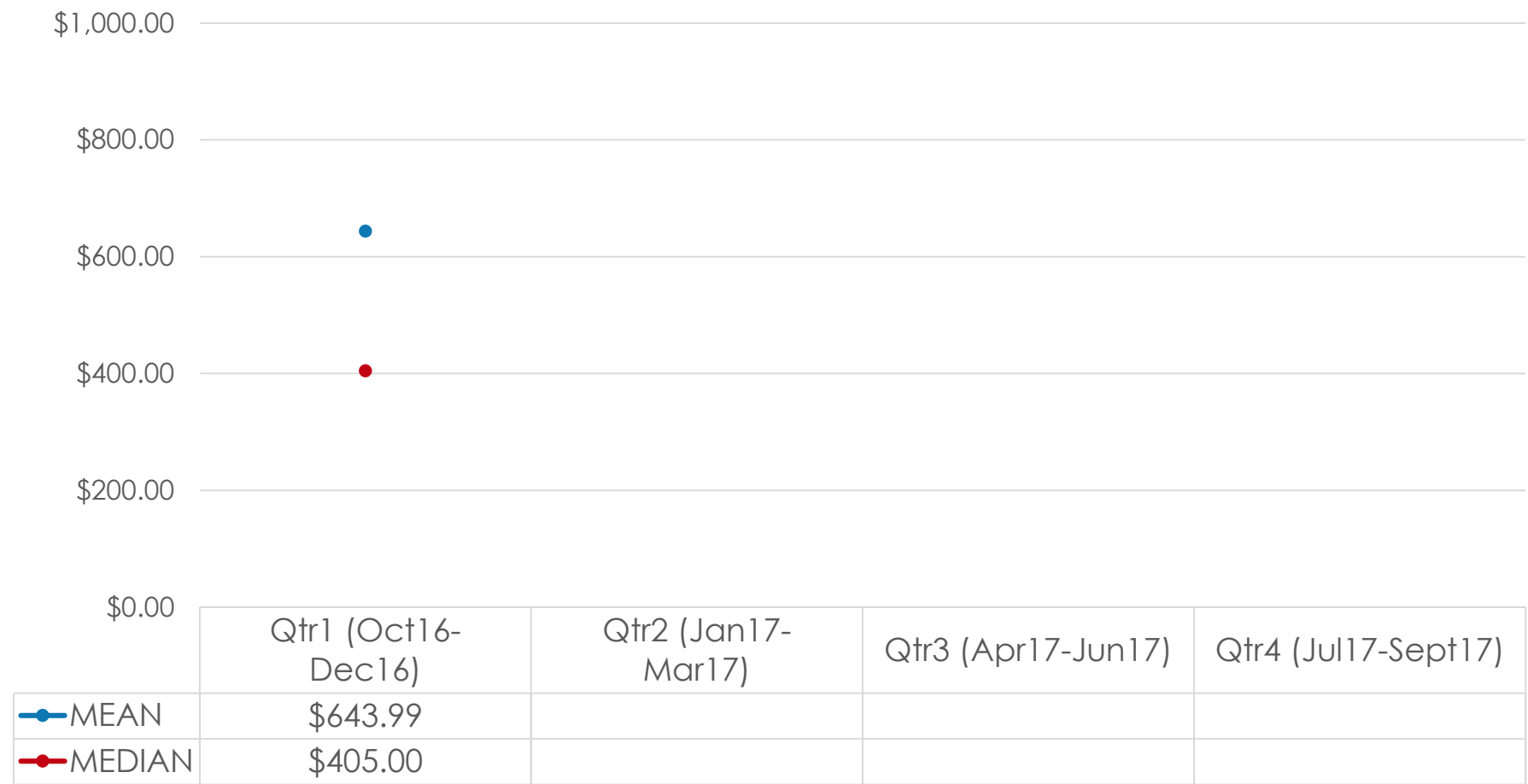
Prepaid– FY2017 Tracking

Airfare & Accommodation W/ Meal Packages



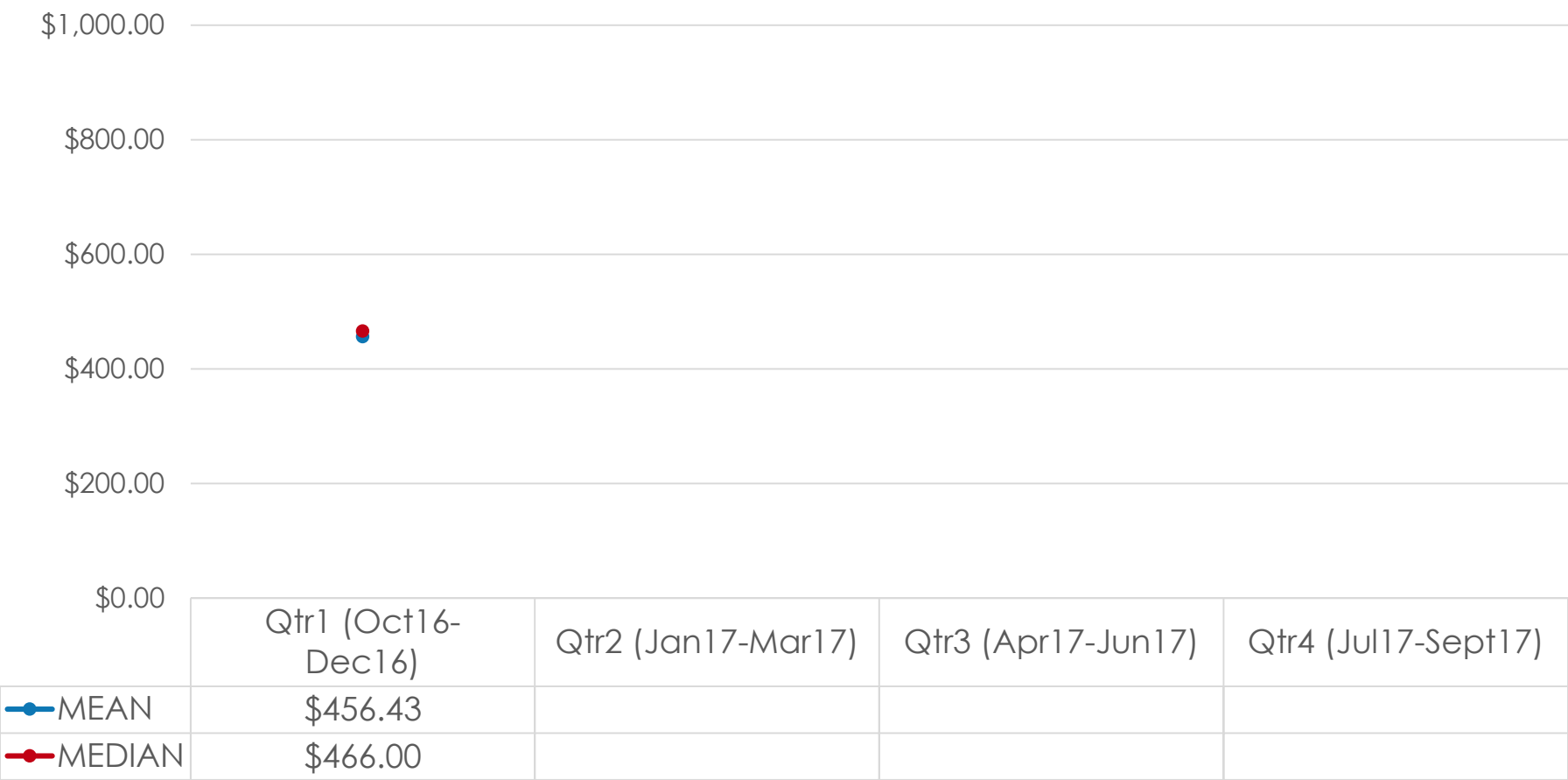
Prepaid– FY2017 Tracking

Airfare Only



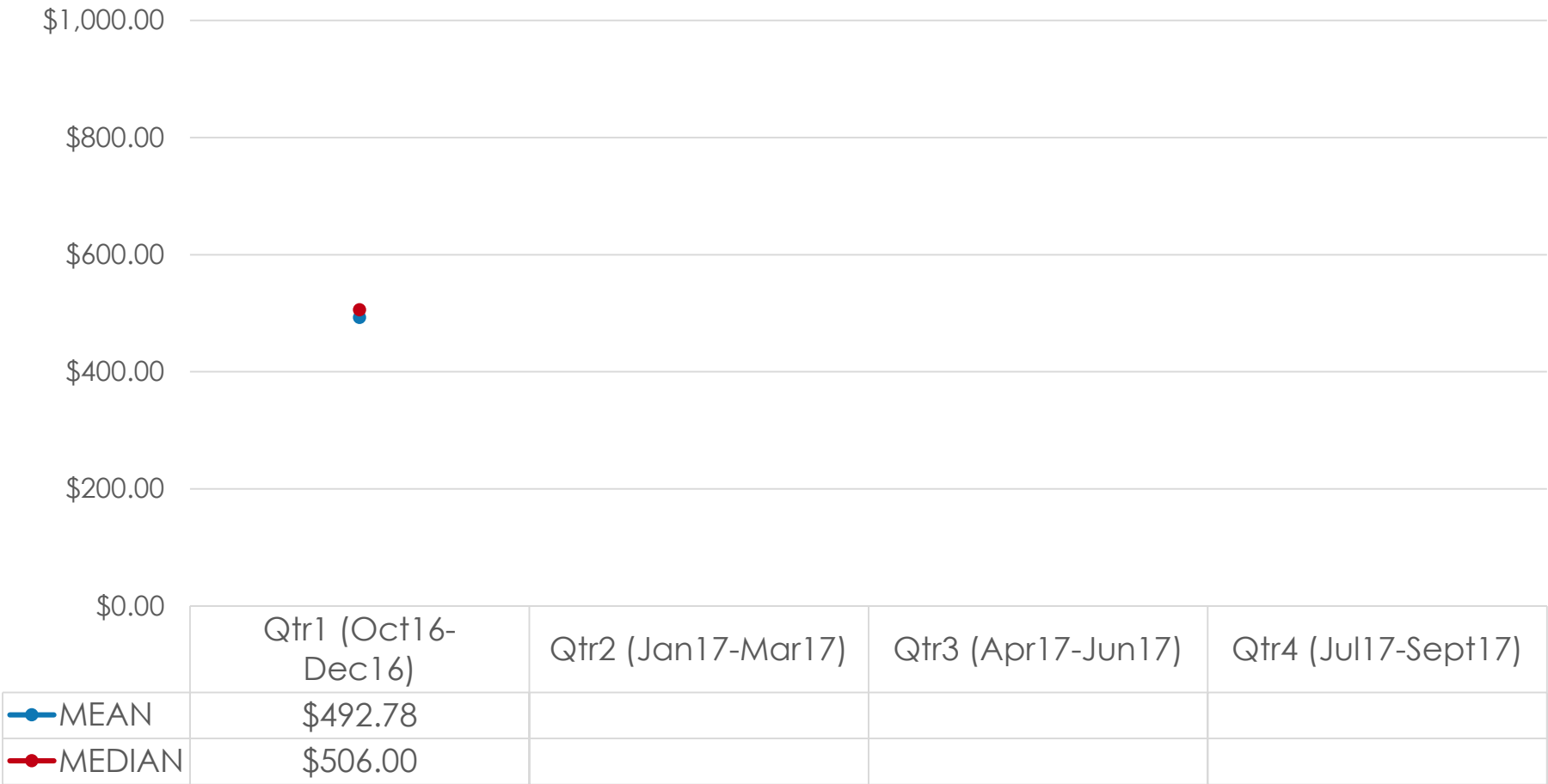
Prepaid– FY2017 Tracking

Accommodations Only



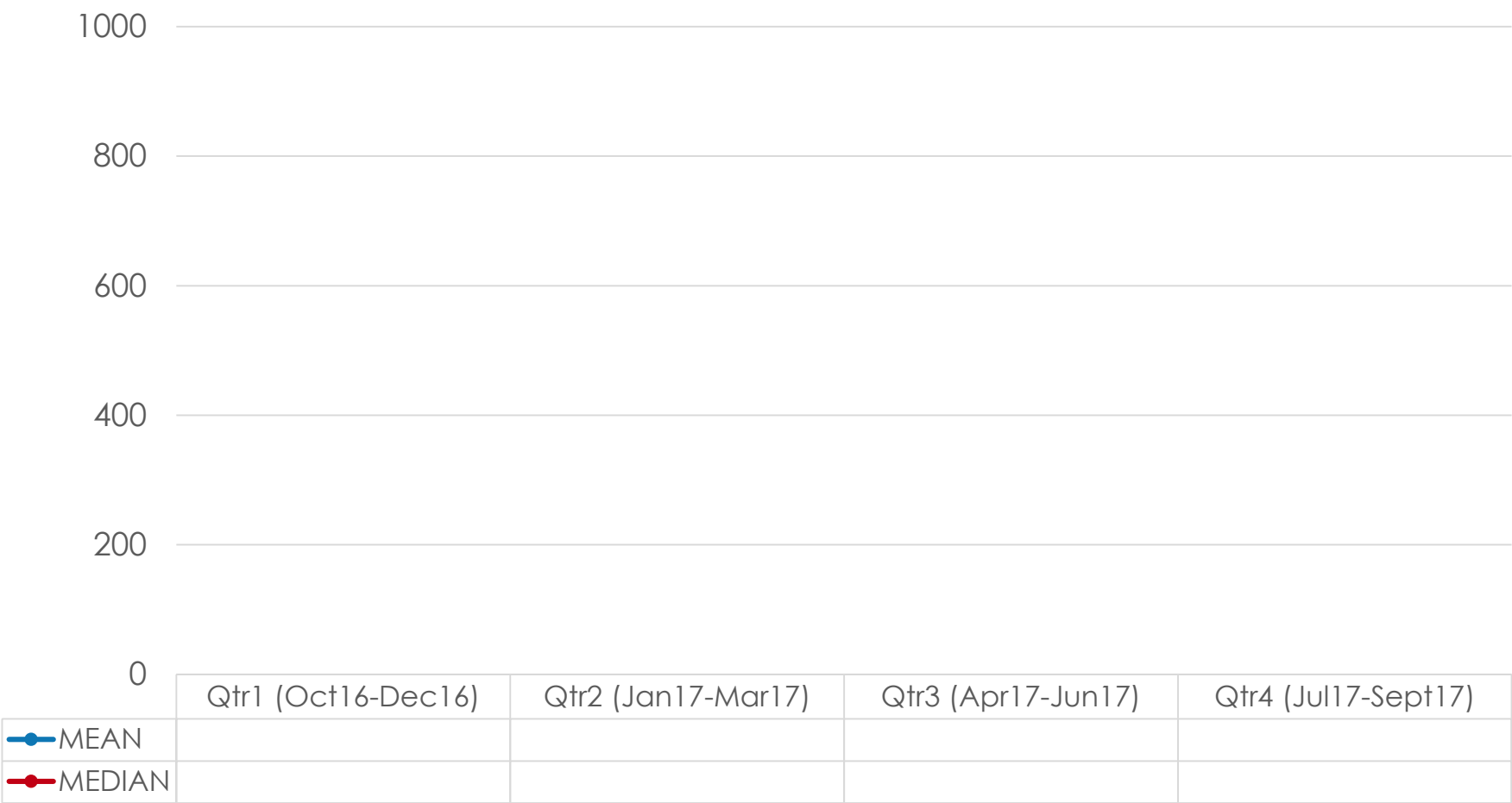
Prepaid– FY2017 Tracking

Accommodations w/ Meal Only



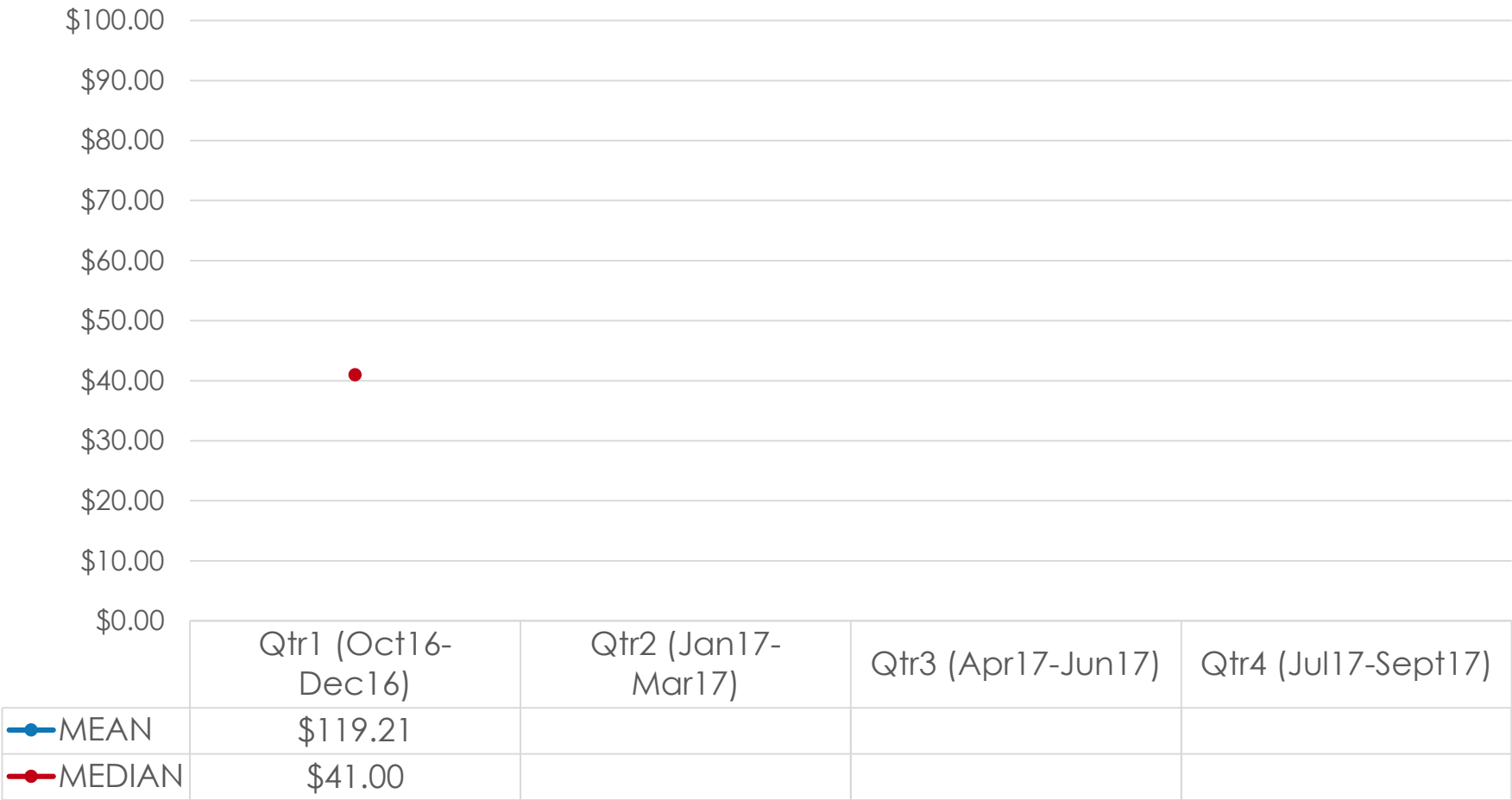
Prepaid– FY2017 Tracking

Food & Beverage in Hotel (N/A)



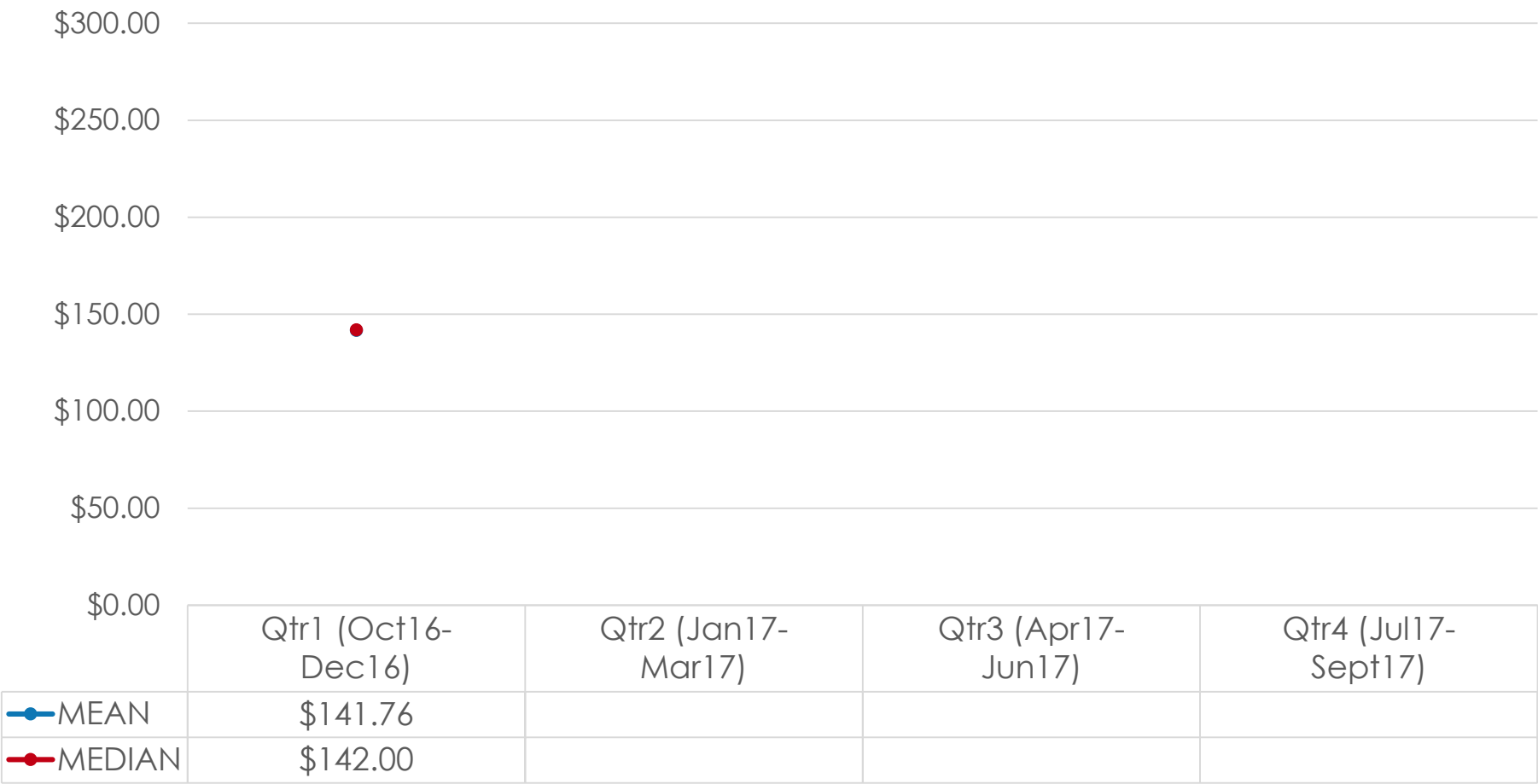
Prepaid– FY2017 Tracking

Ground Transportation - Philippines



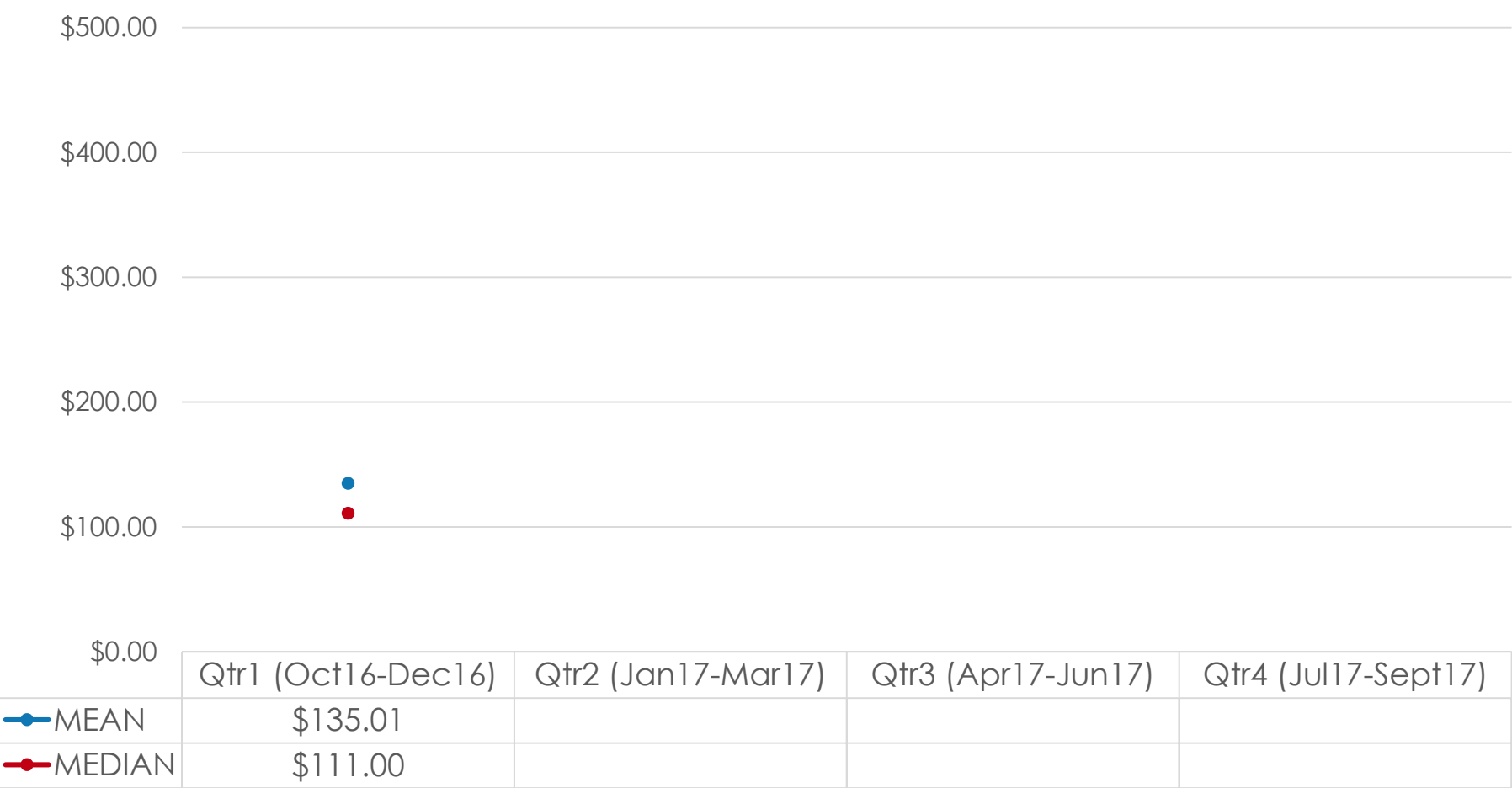
Prepaid– FY2017 Tracking

Ground Transportation - Guam



Prepaid– FY2017 Tracking

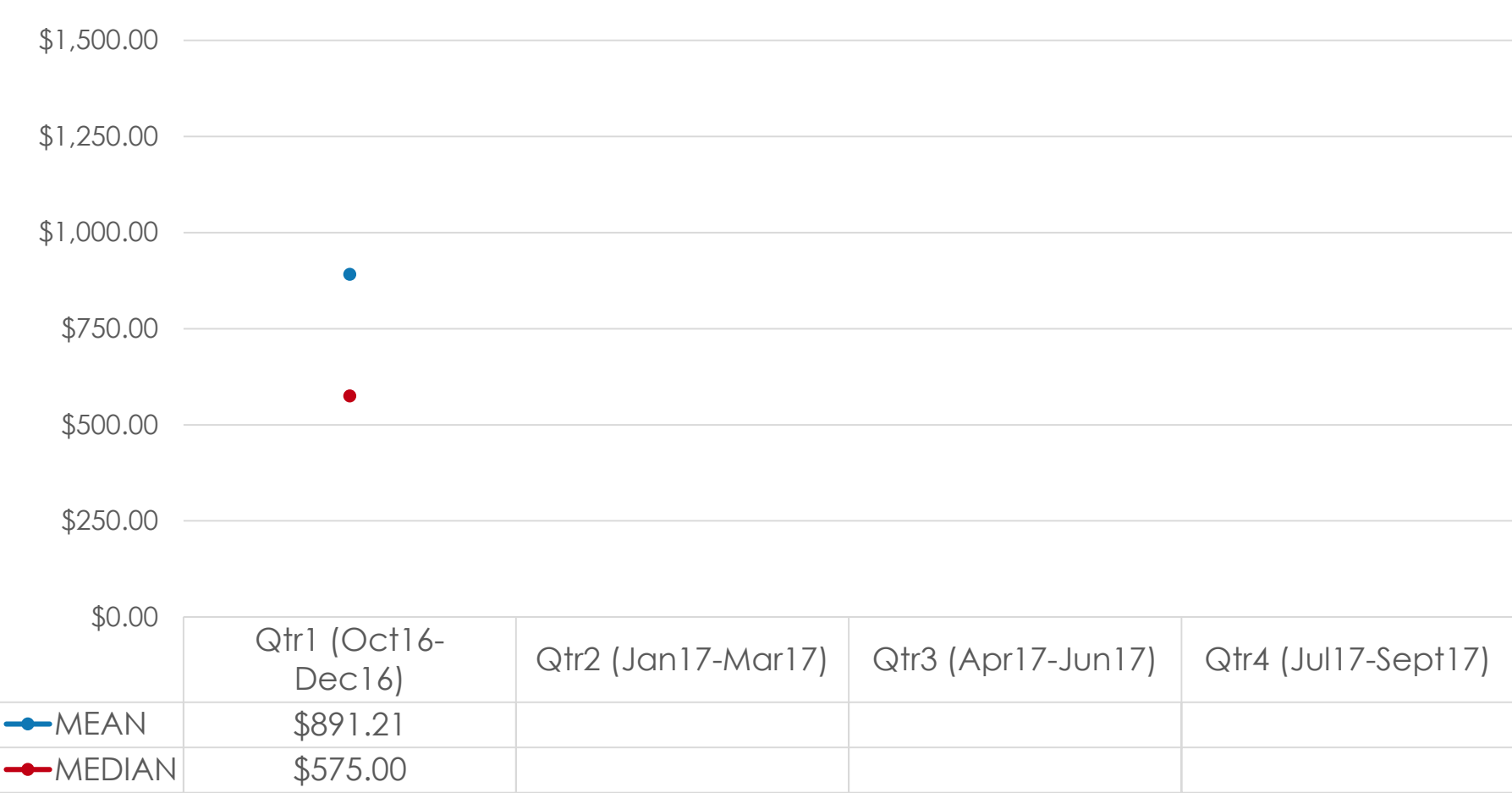
Optional tours/ Activities



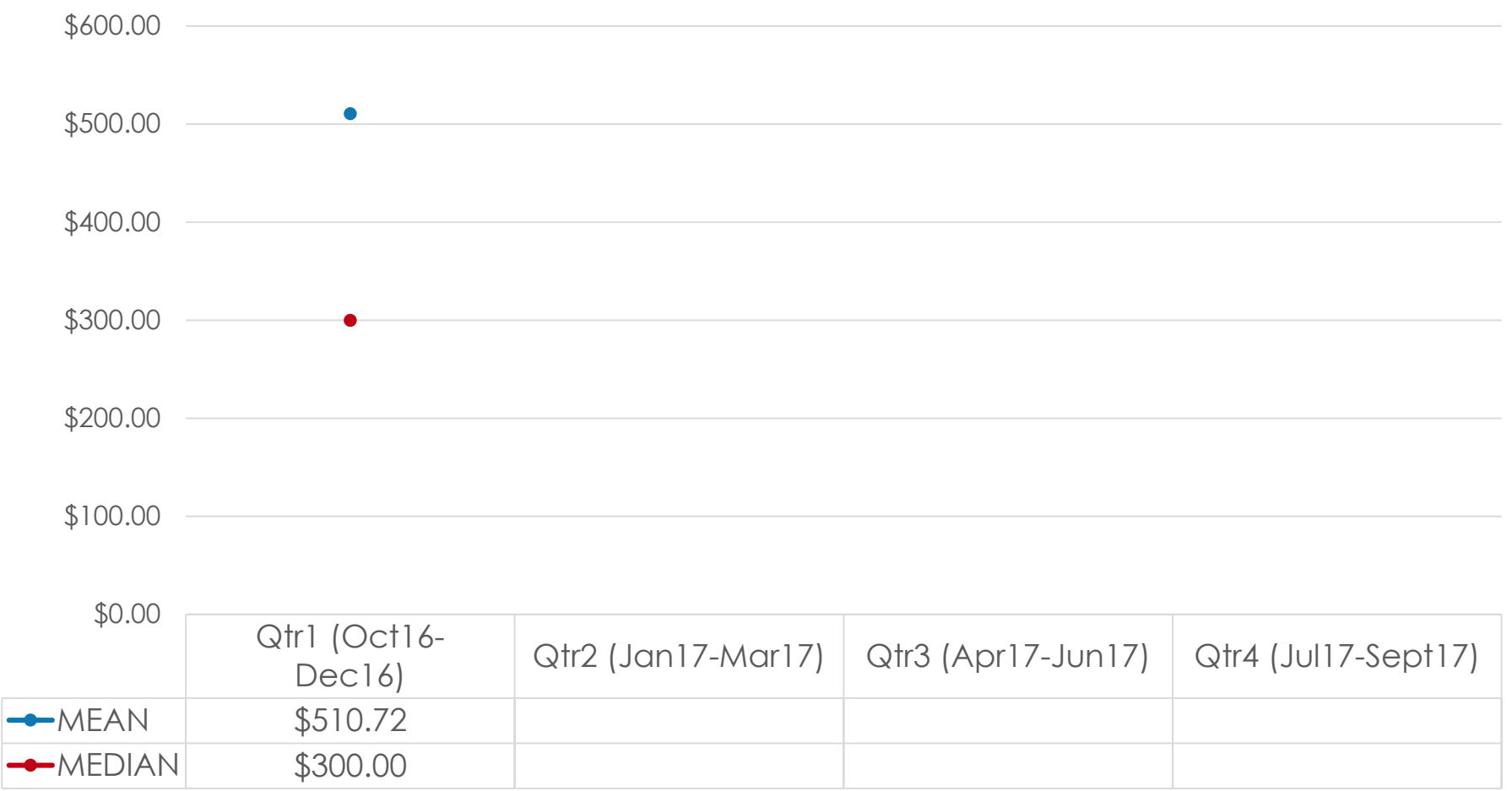
On-Island Expenditures

- \$891.21 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$510.72 = overall mean average per person prepaid expenditures

On-Island Entire Travel Party – FY2017 Tracking



On-Island Per Person – FY2017 Tracking



On-Island Per Person – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

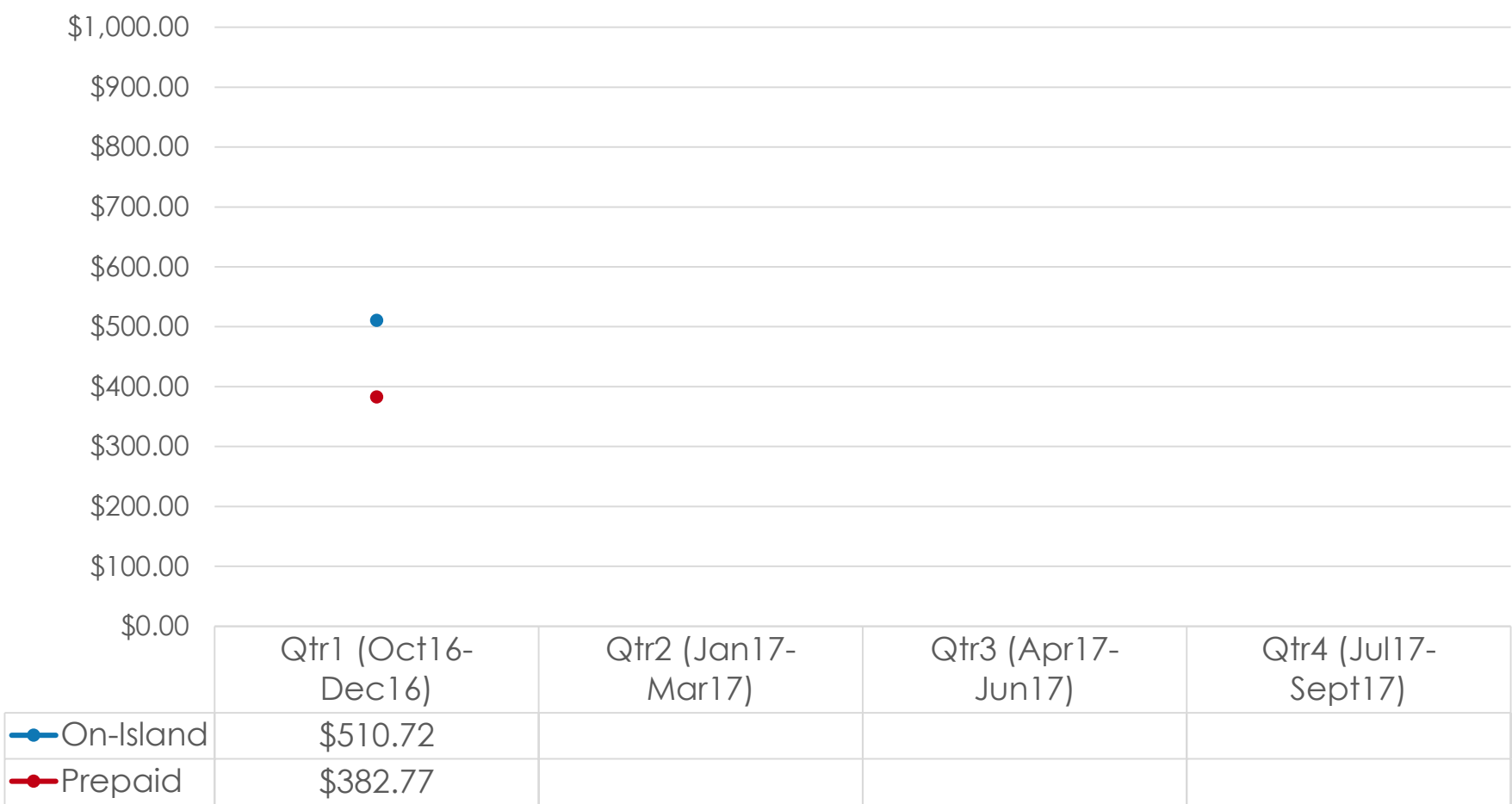
Q11A How much in total did you spend while on Guam during this trip?

PER PERSON

		TOTAL	FAMILY	FIT	LEISURE
		-	-	-	-
PER PERSON	Mean	\$510.72	\$446.64	\$513.13	\$491.09
	Median	\$300	\$275	\$307	\$295

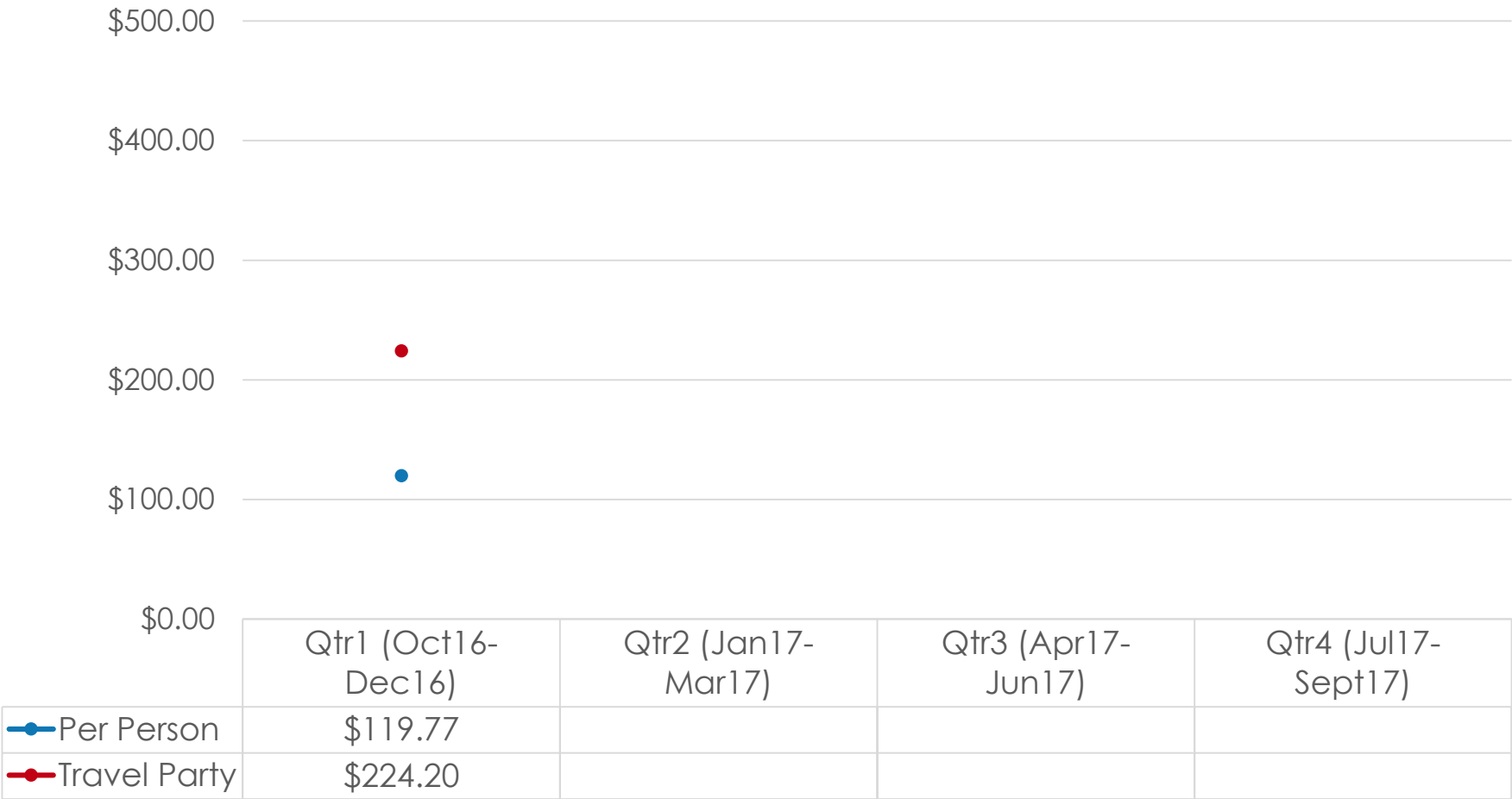
Prepared by QMark Research

Per Person MEAN expenditures – FY2017 Tracking On-Island/ Prepaid



On-Island Per Day Spending – FY2017 Tracking

MEAN

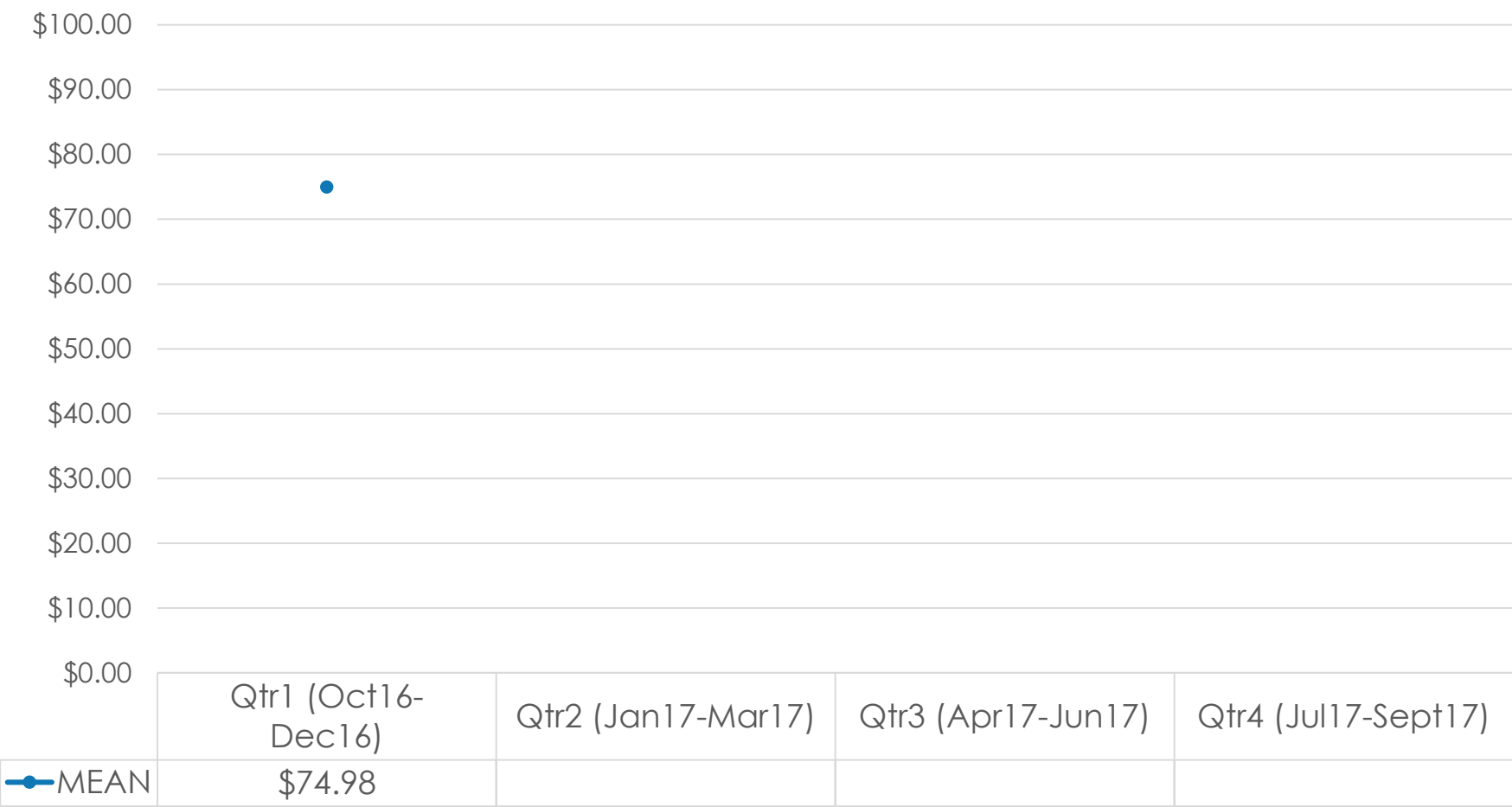


On-Island Expenses by Category – MEAN Entire Travel Party



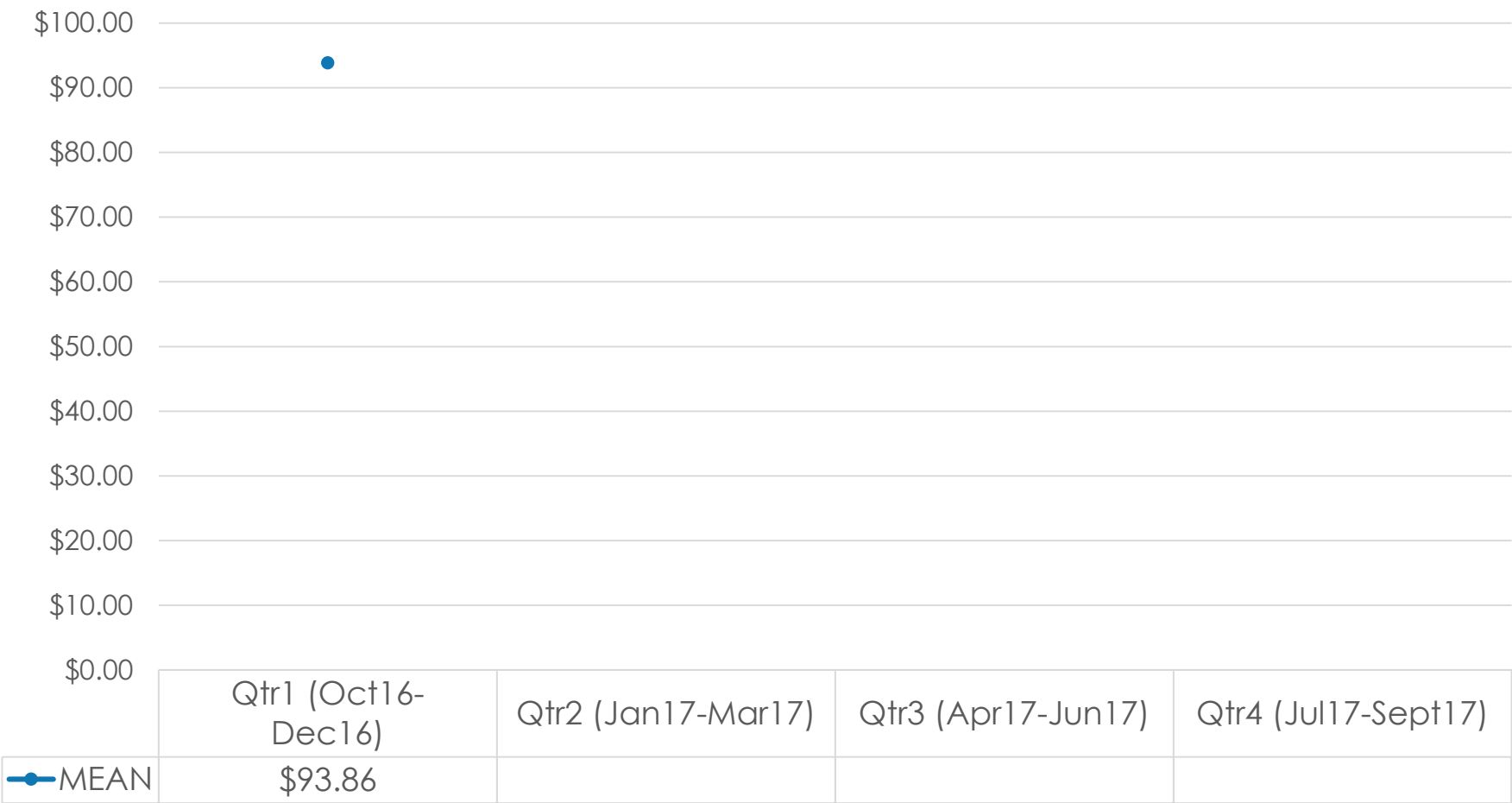
On-Island – FY2017 Tracking

Food & Beverage - Hotel



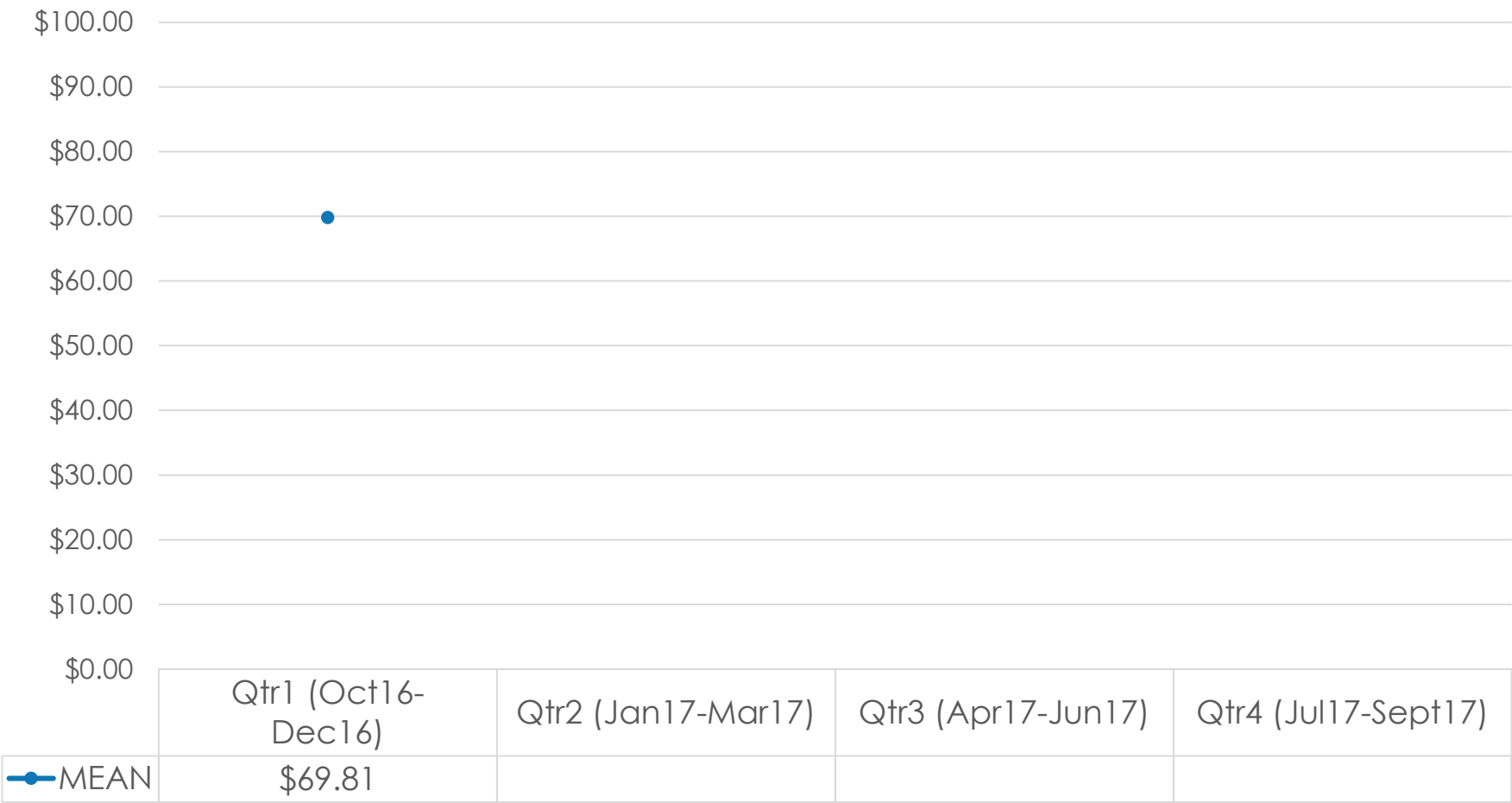
On-Island – FY2017 Tracking

Food & Beverage – Fast Food/ Convenience Store



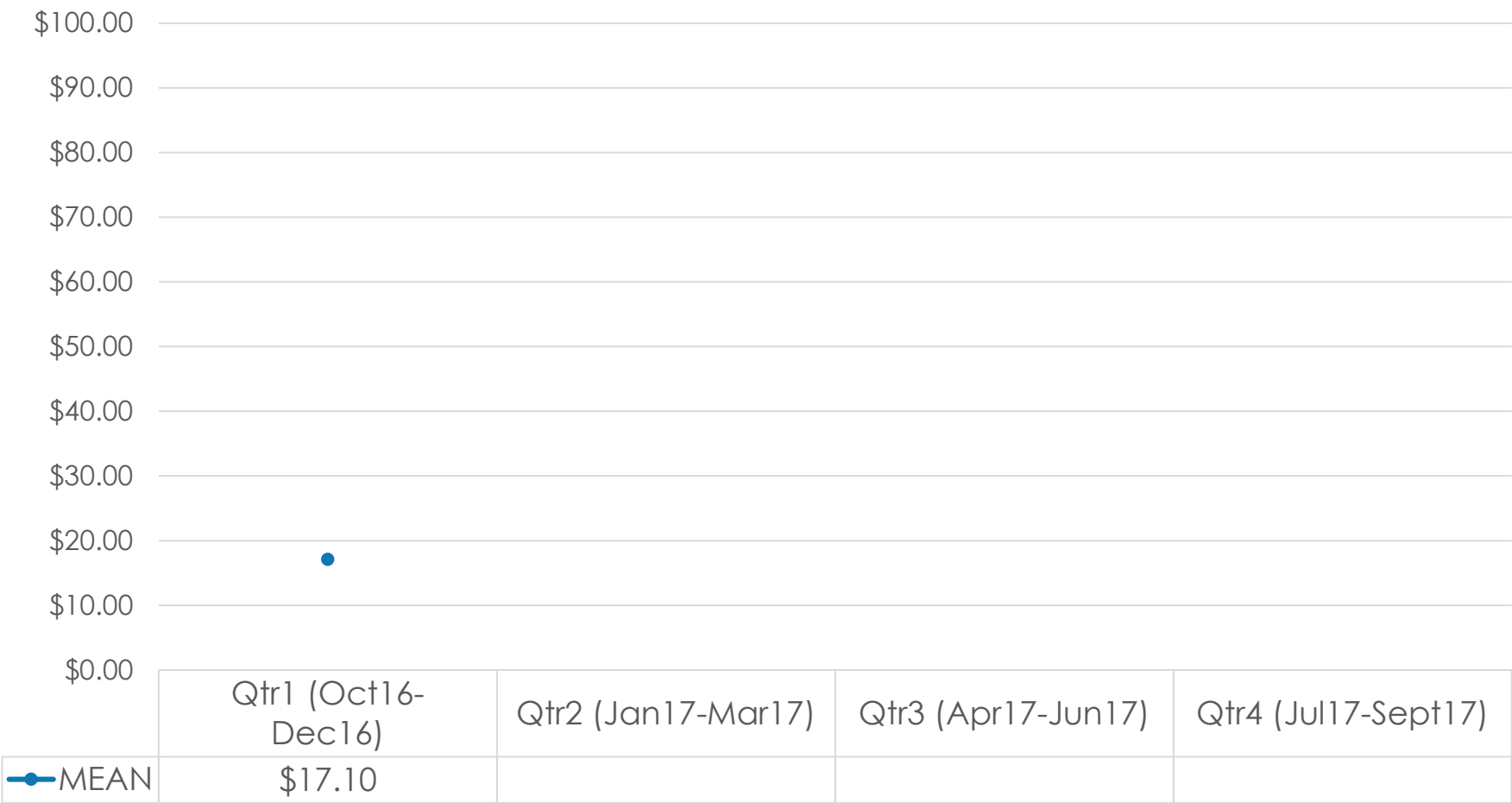
On-Island – FY2017 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



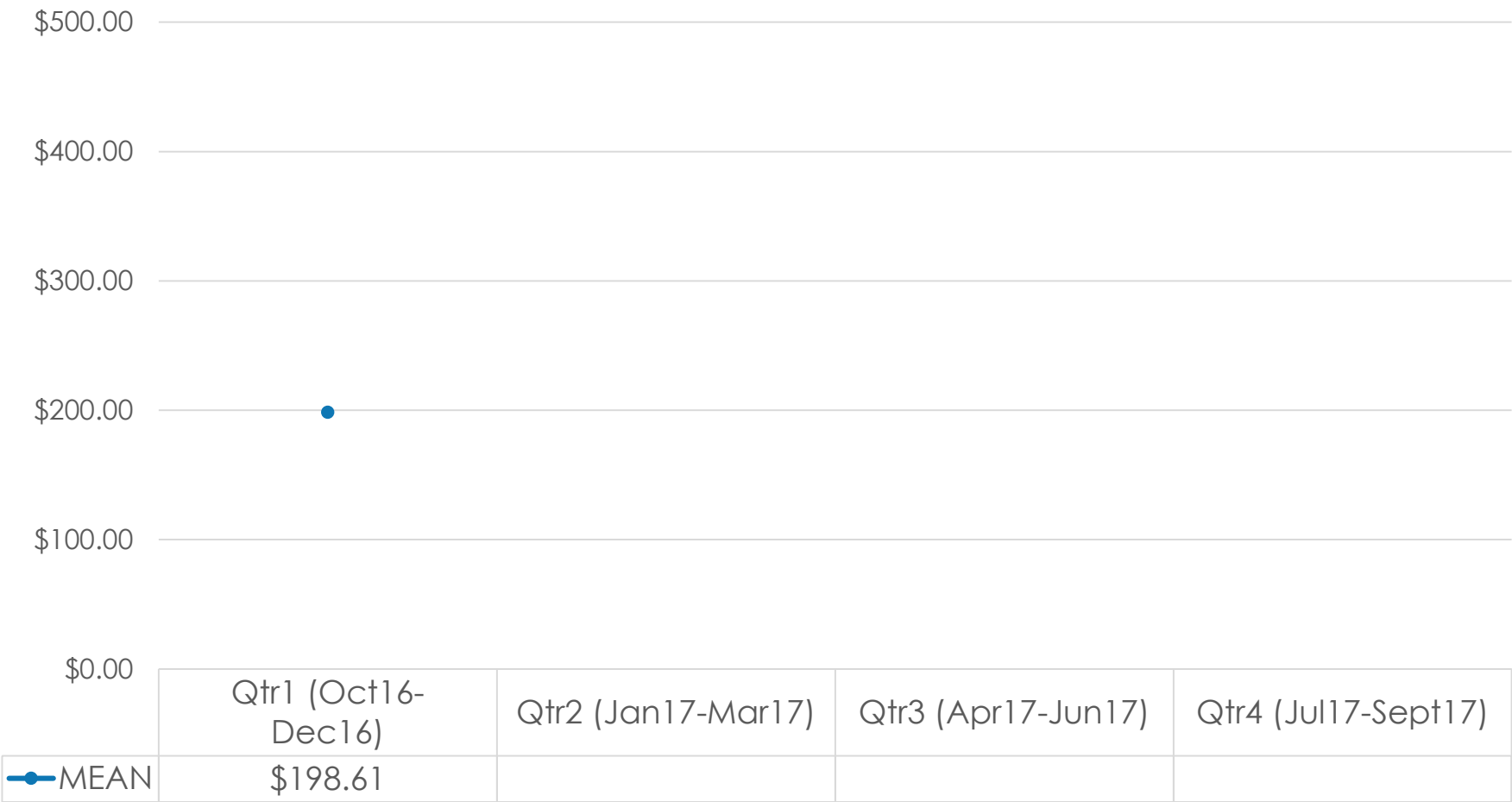
On-Island – FY2017 Tracking

Optional tour/ Activities



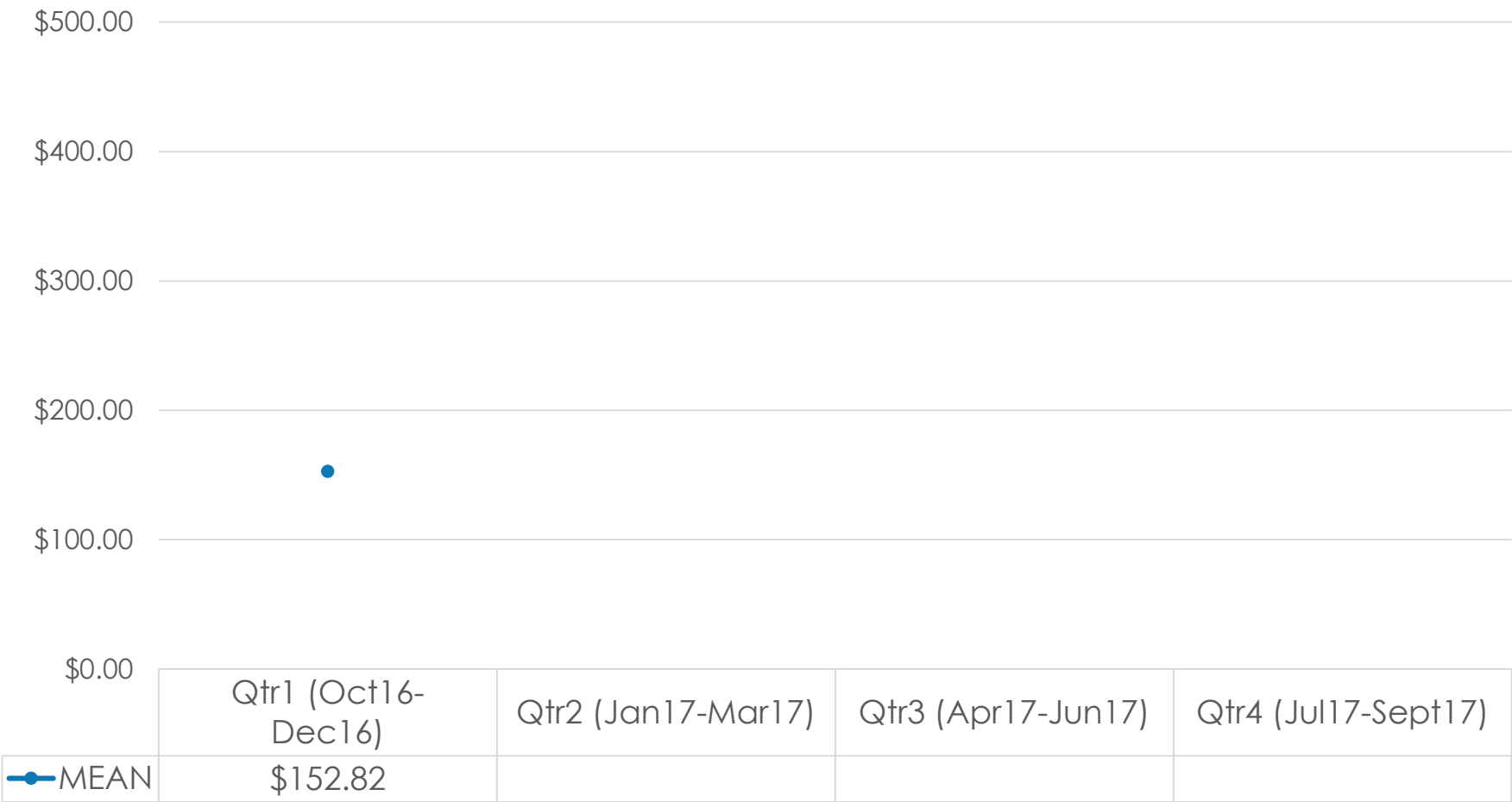
On-Island – FY2017 Tracking

Gift/ Souvenir – Self/ Companion



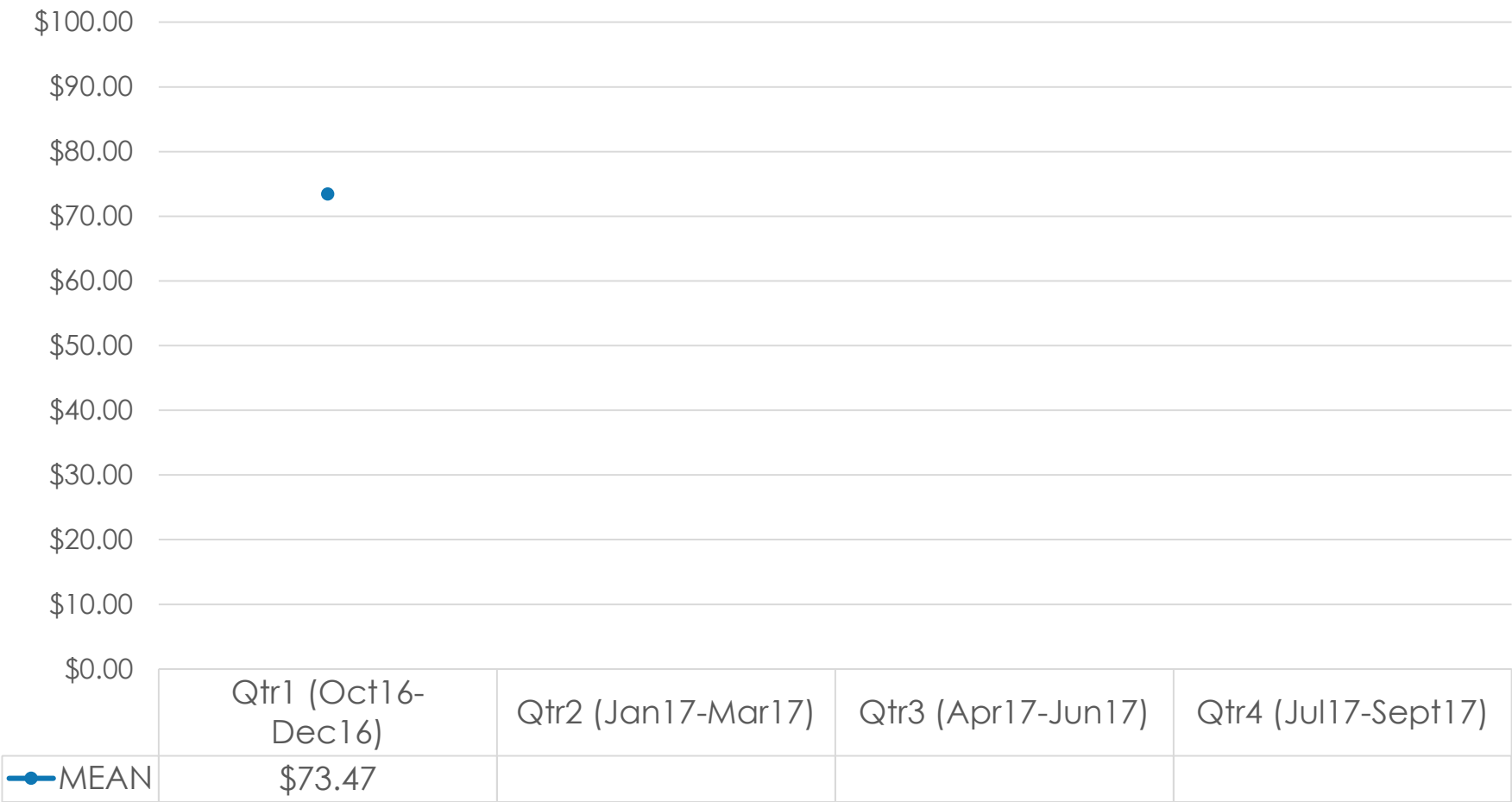
On-Island – FY2017 Tracking

Gift/ Souvenir – Friends/ Family



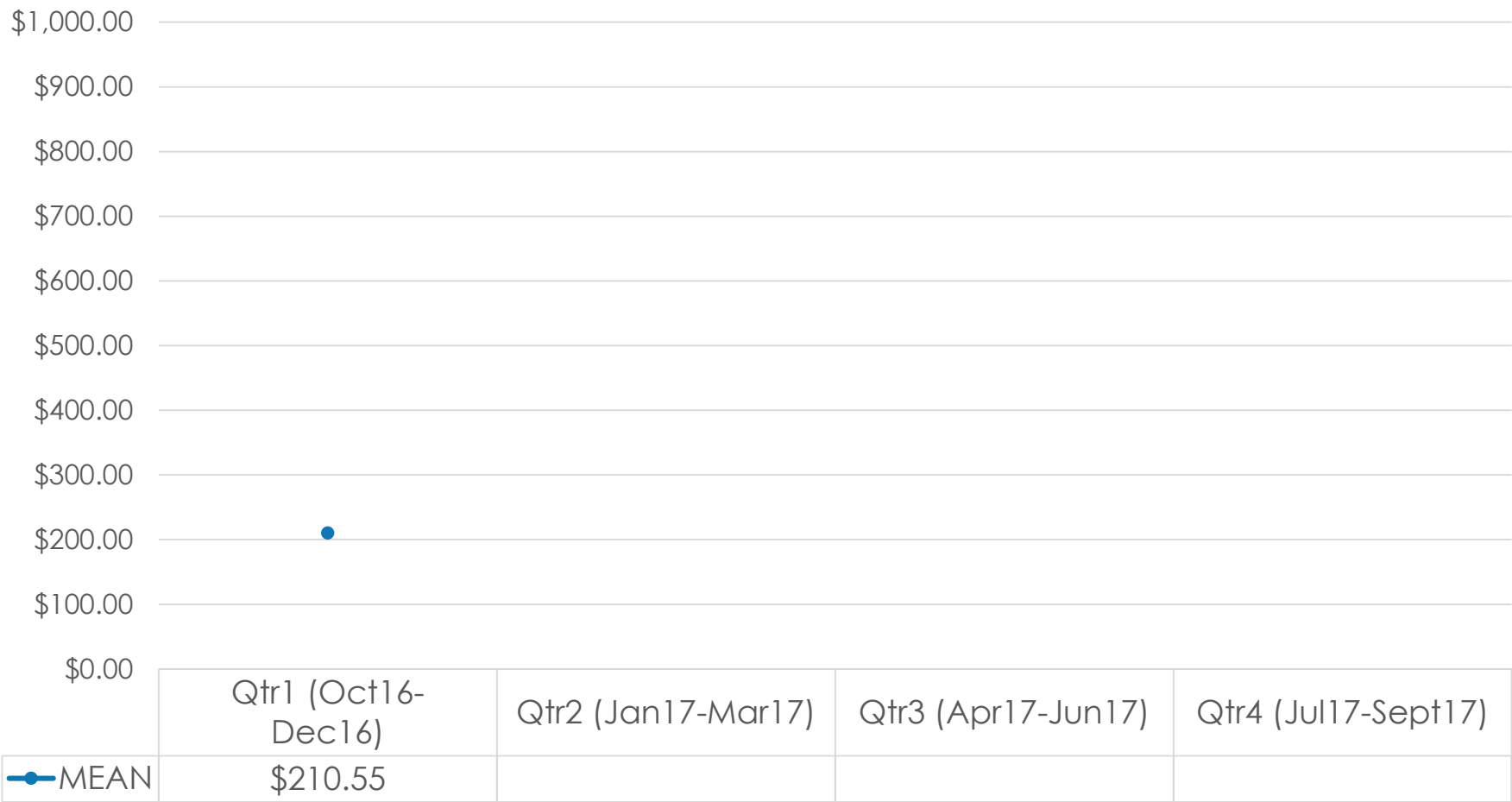
On-Island – FY2017 Tracking

Local Transportation



On-Island – FY2017 Tracking

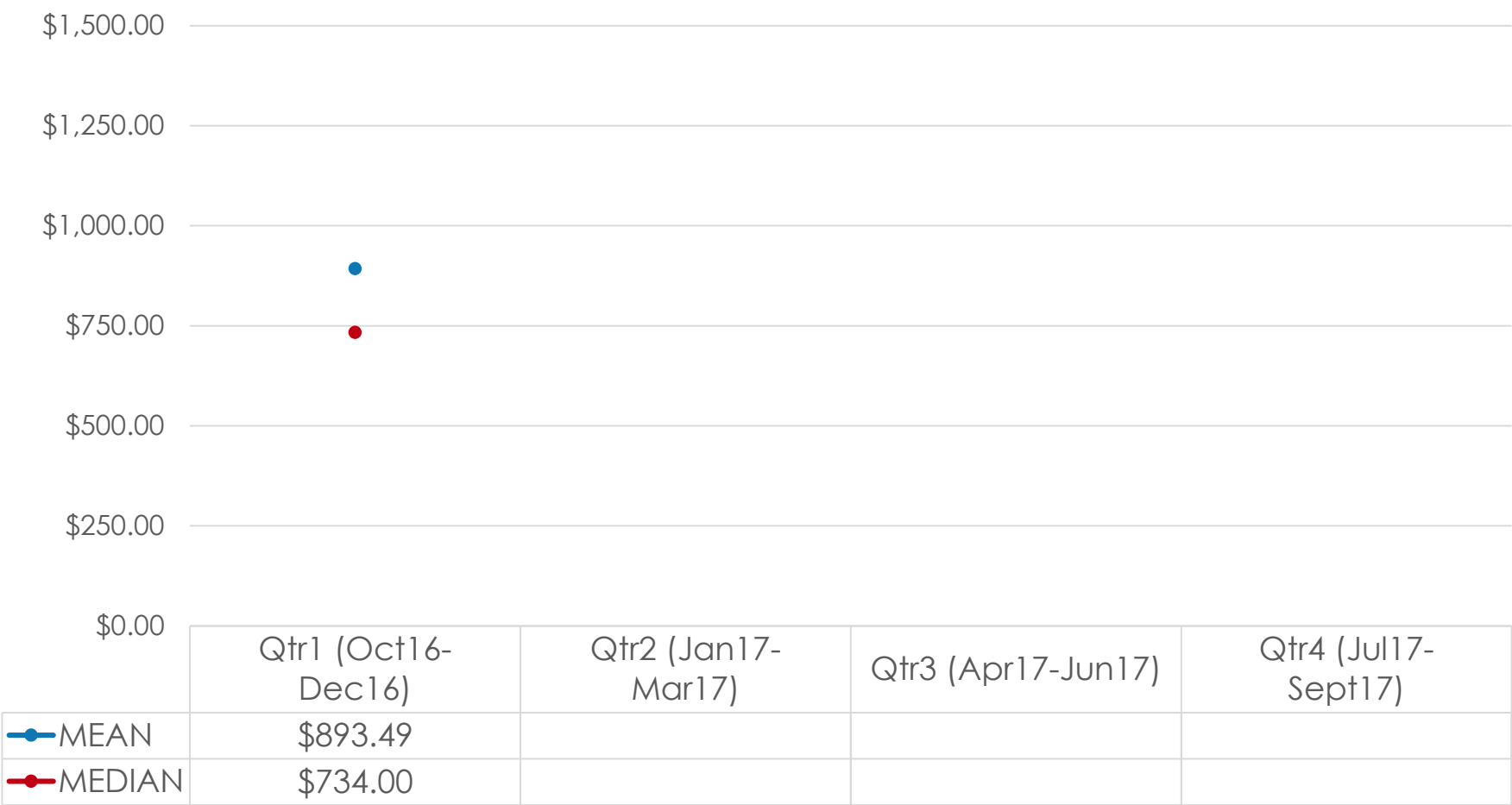
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$893.49 = overall mean average prepaid expense by respondent/ Per Person

TOTAL Per Person Expenditures – FY2017 Tracking



TOTAL Per Person Expenditures – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

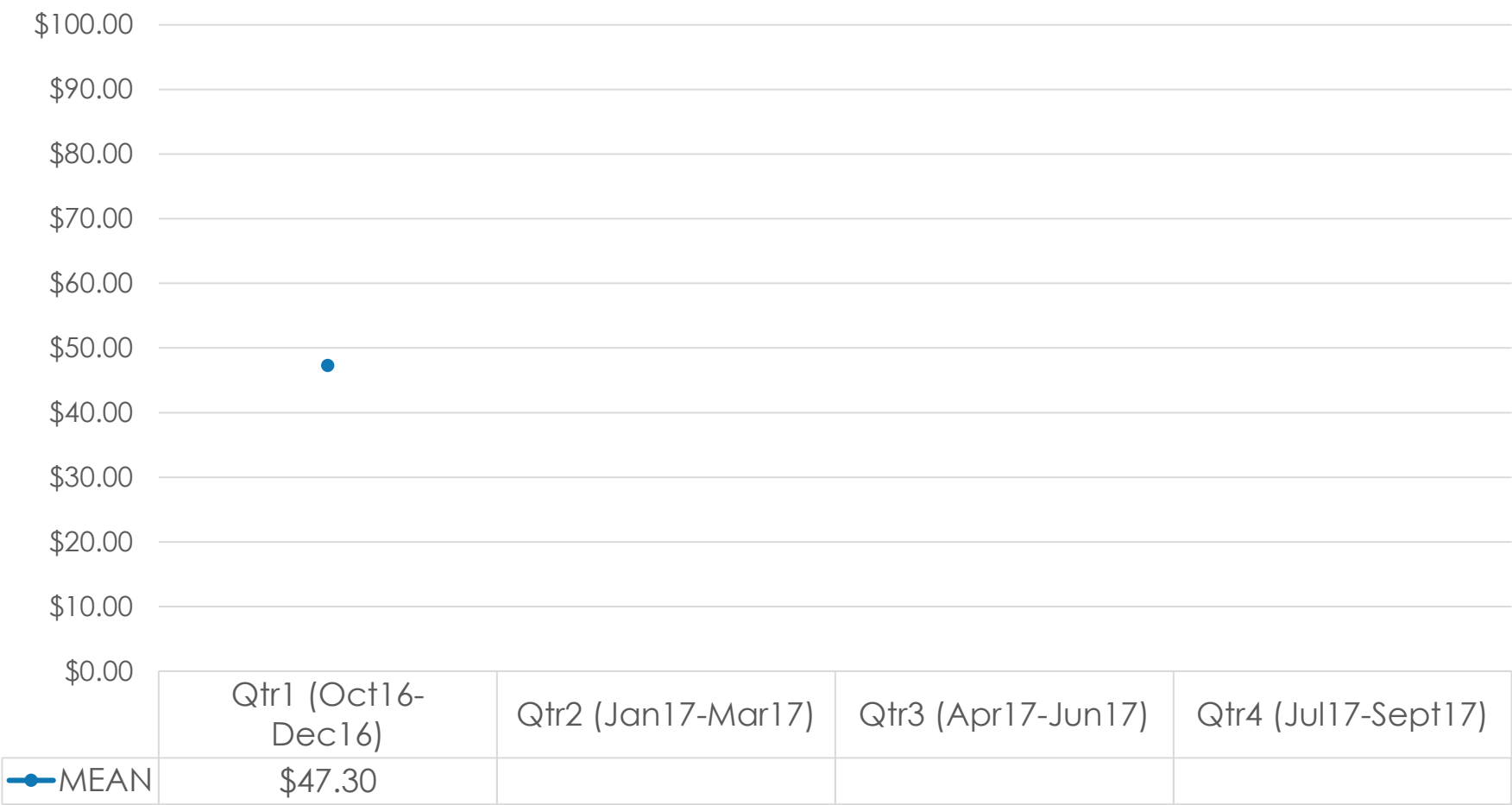
TOTAL EXPENDITURES (On-Isle / Prepaid)

PER PERSON

		TOTAL	FAMILY	FIT	LEISURE
		-	-	-	-
TOTAL PP	Mean	\$893.49	\$838.78	\$886.88	\$920.57
	Median	\$734	\$706	\$829	\$758

Prepared by QMark Research

GUAM AIRPORT EXPENDITURE – FY2017 Tracking



PARTICIPATED IN SHOP GUAM e-FESTIVAL (N/A)



SHOP GUAM E-FESTIVAL SPENDING – FY2017 Tracking (N/A)

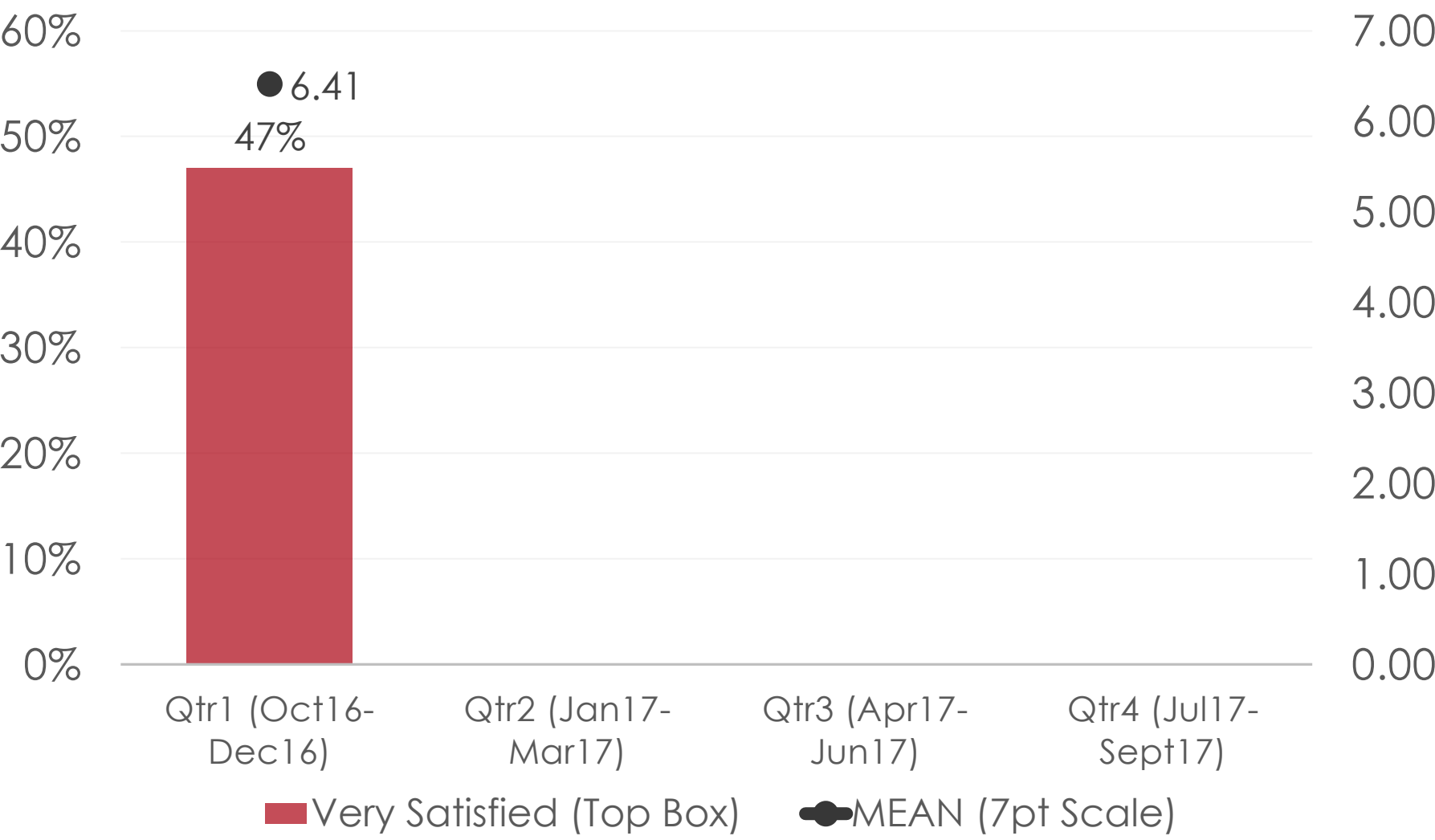


SECTION 4

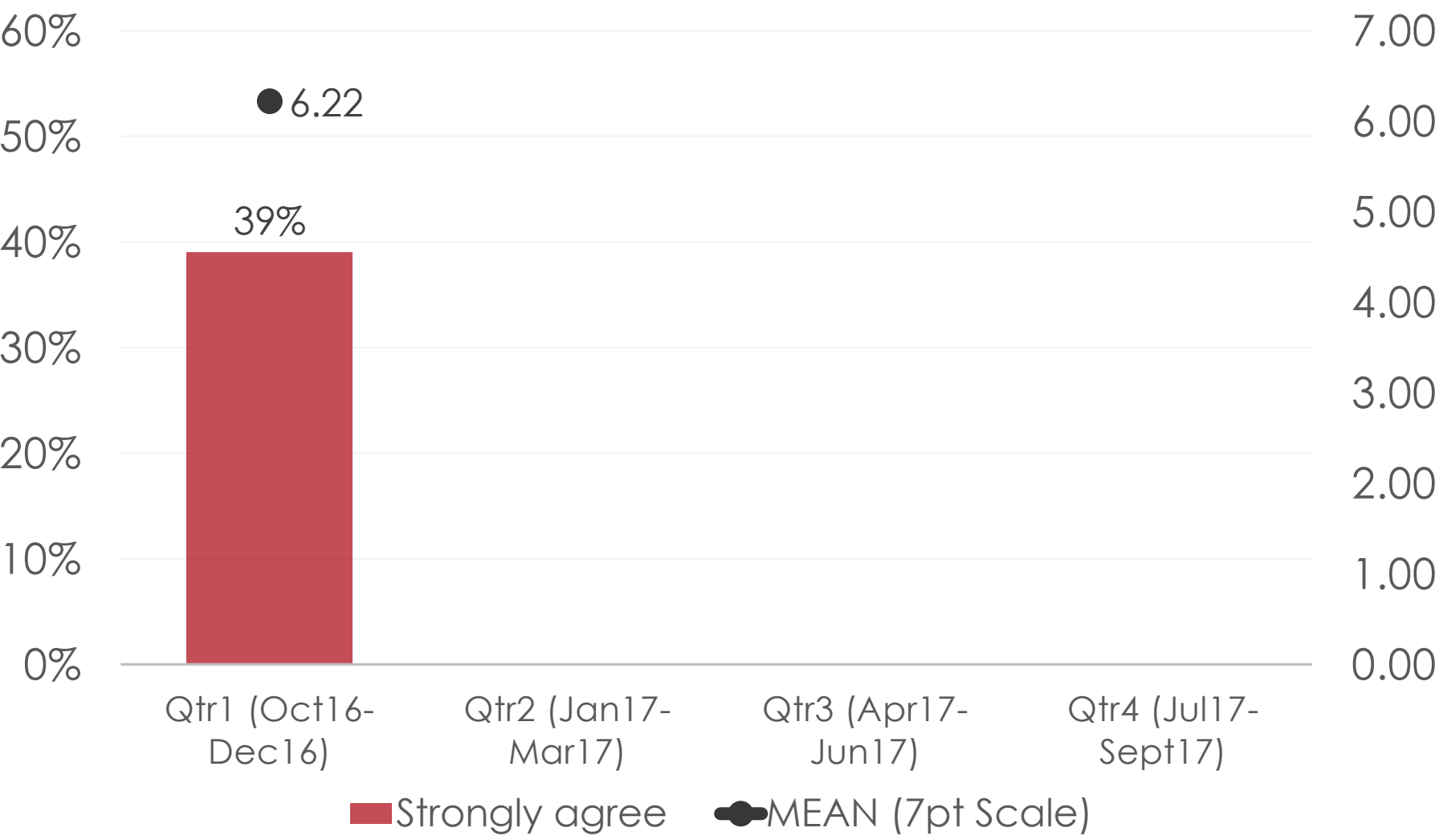
VISITOR SATISFACTION

BEHAVIOR

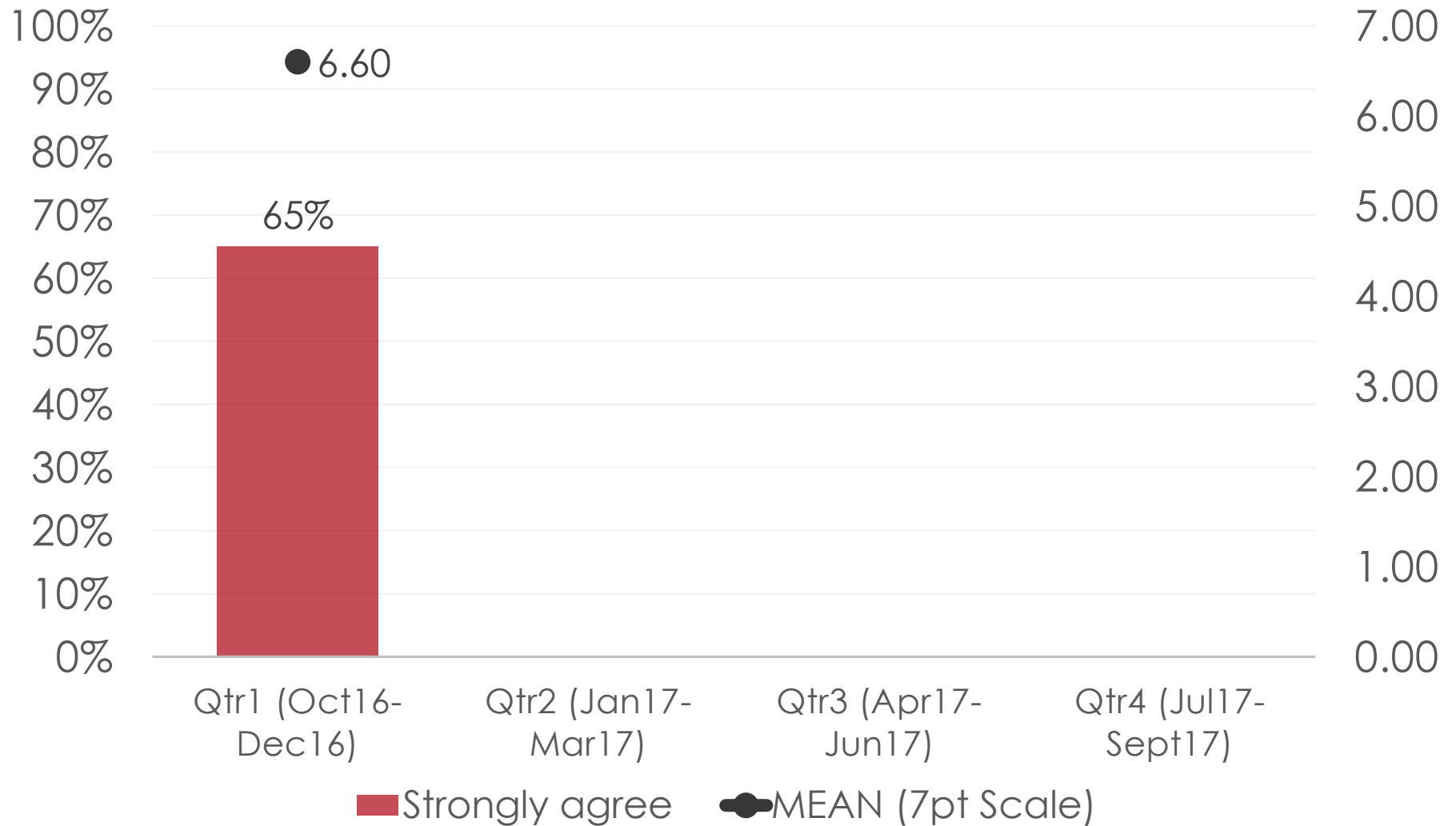
OVERALL SATISFACTION



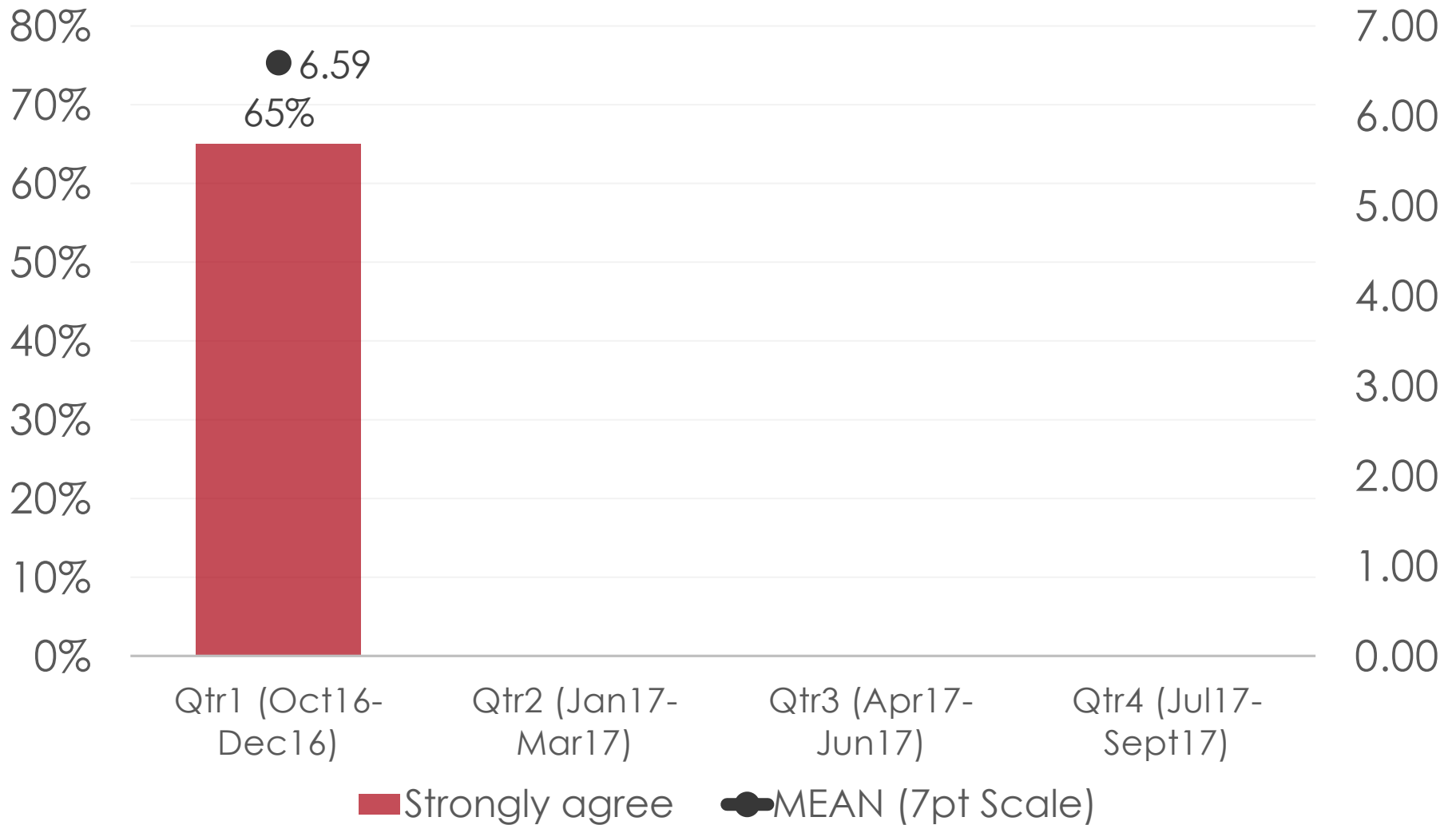
Guam was better than expected



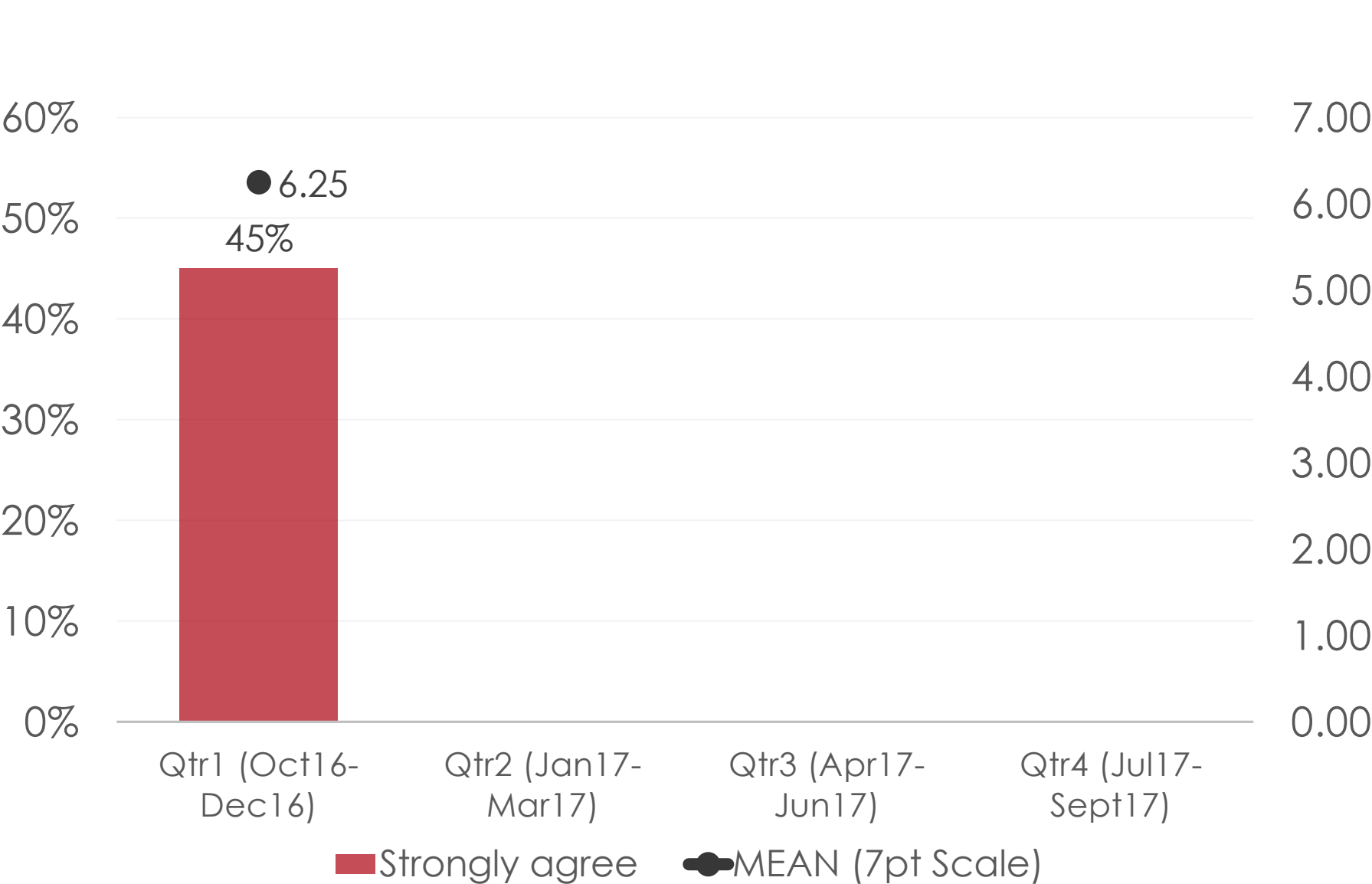
I had no communication problems



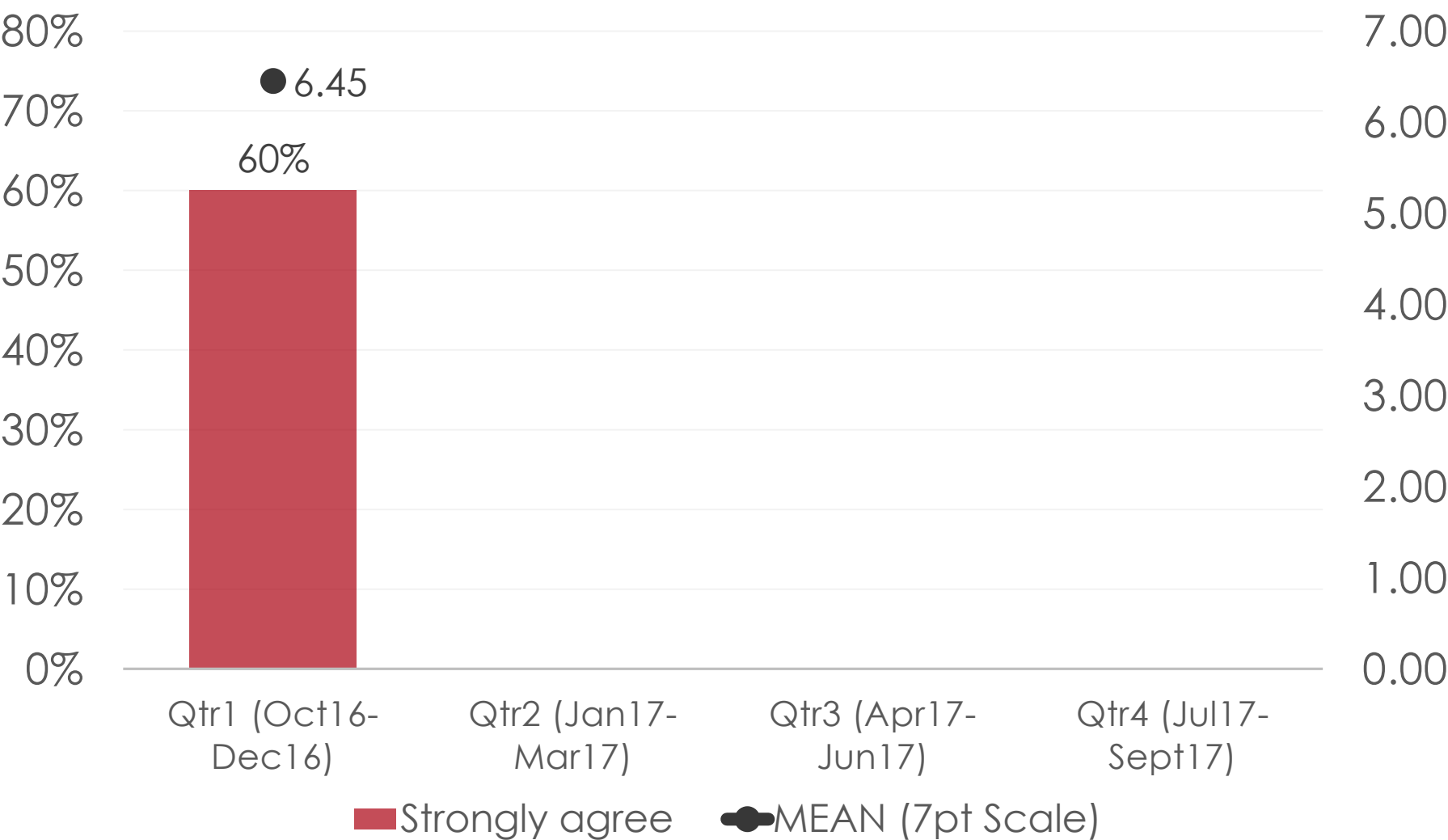
I will recommend Guam to friends



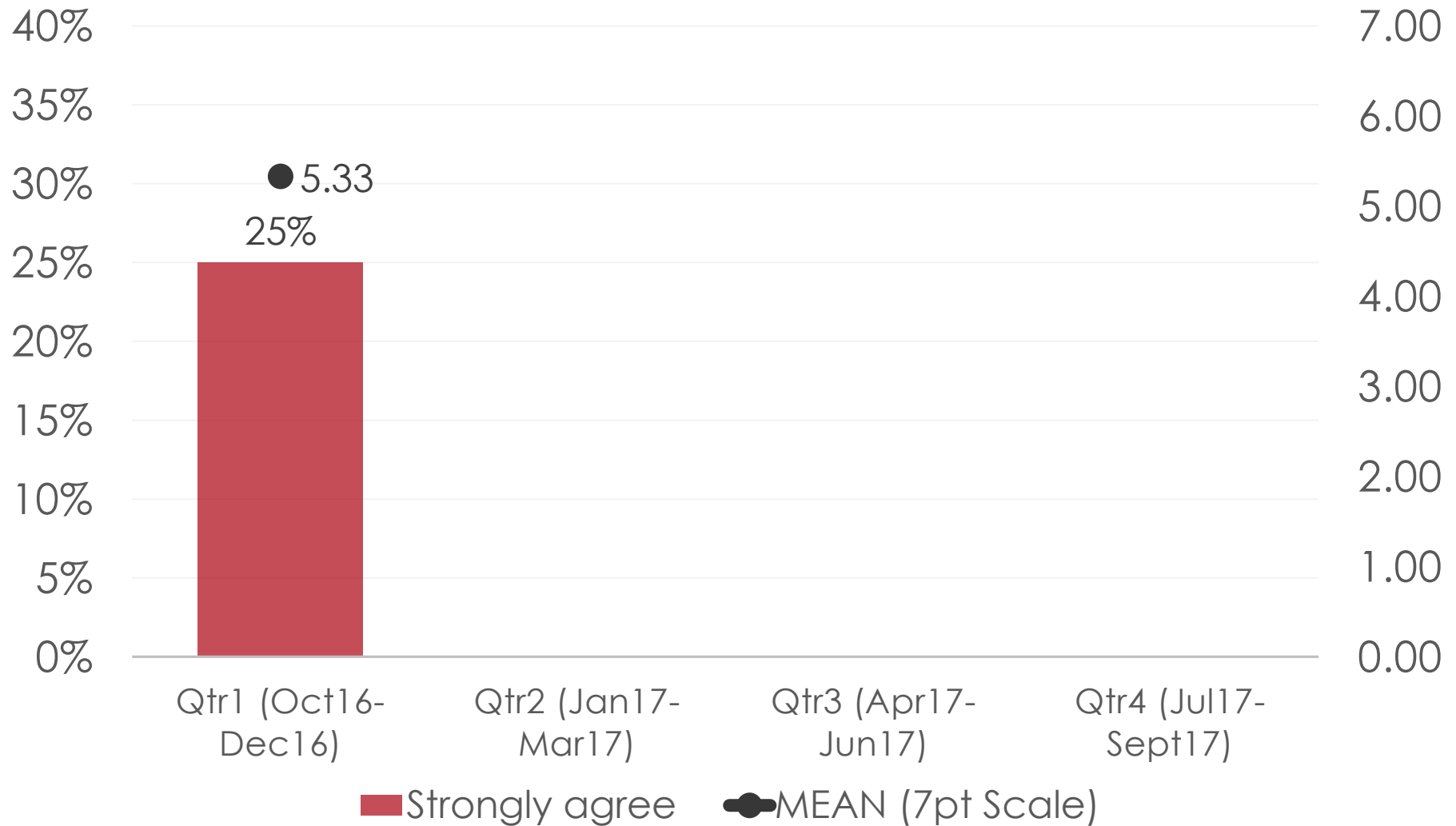
Sites on Guam were attractive



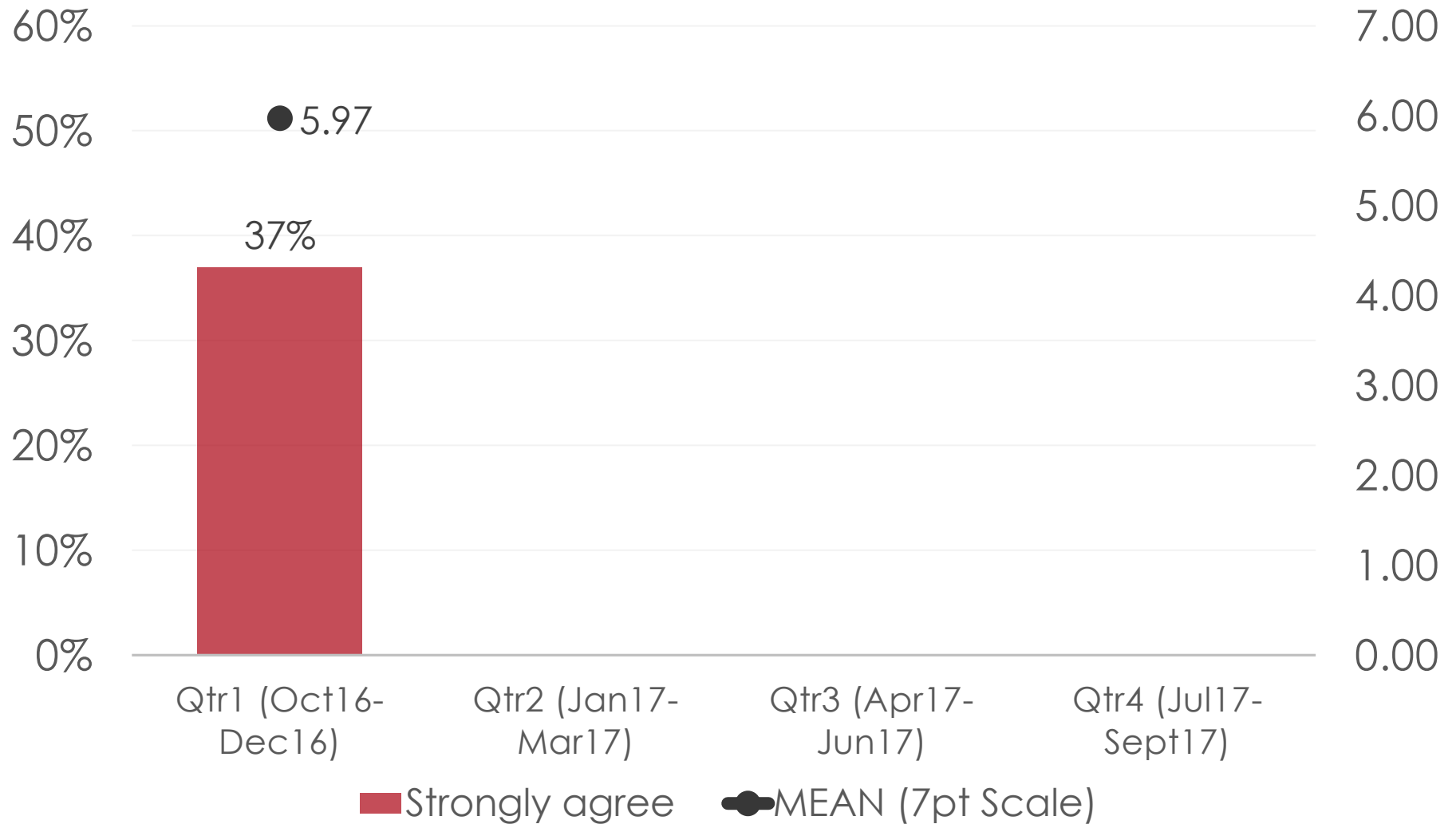
I plan to visit Guam again



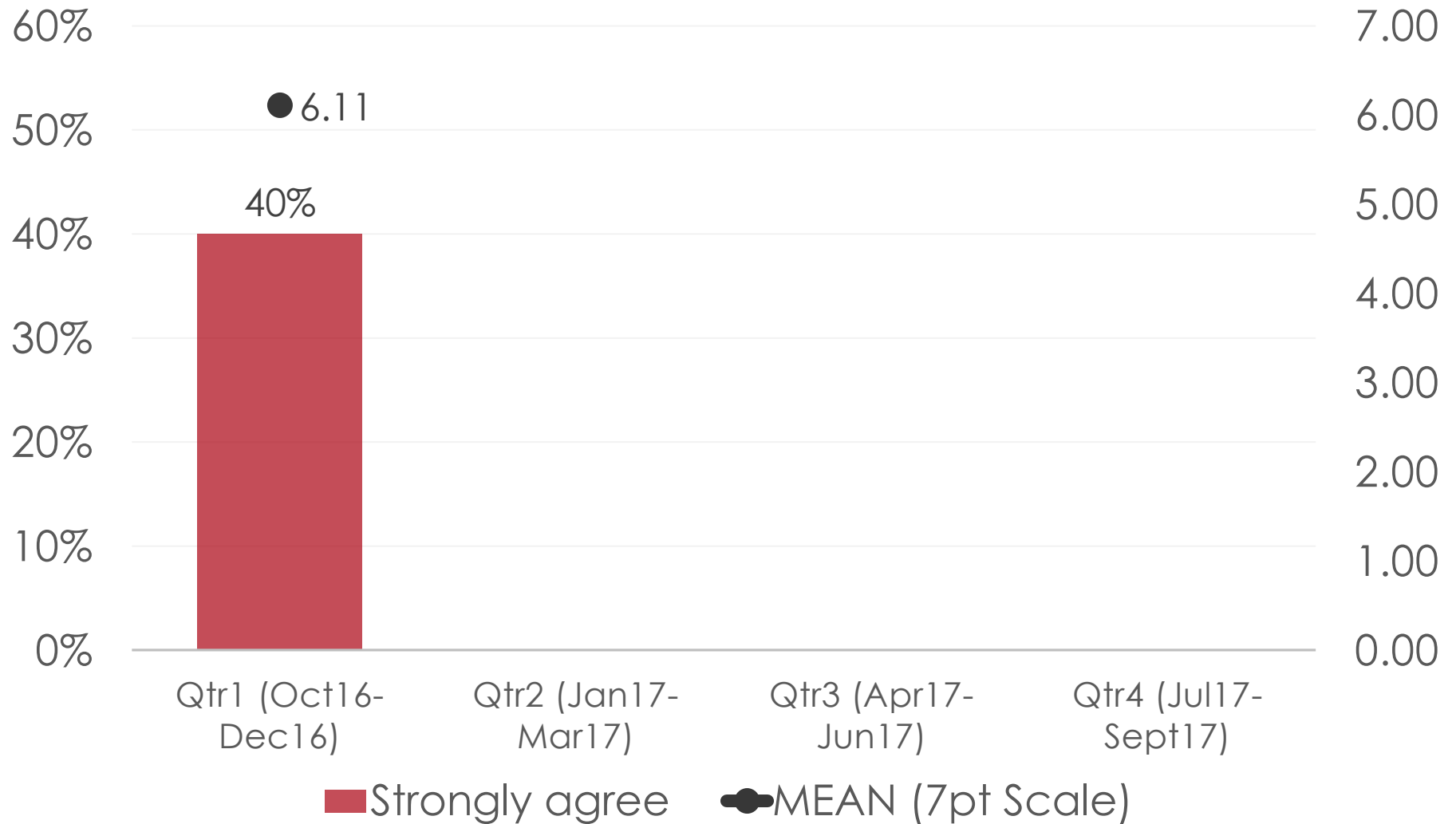
Not enough night time activities



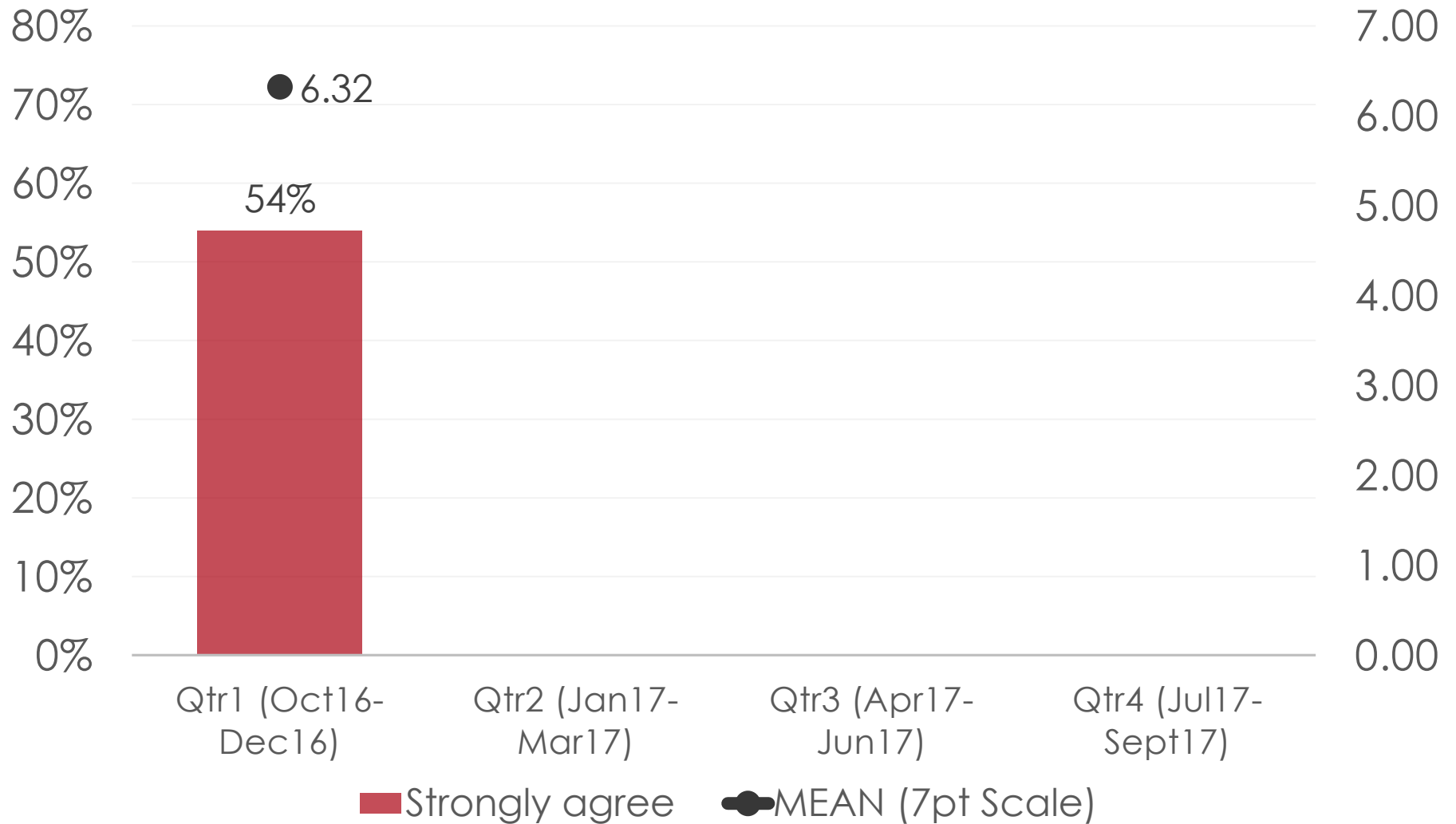
Tour guides were professional



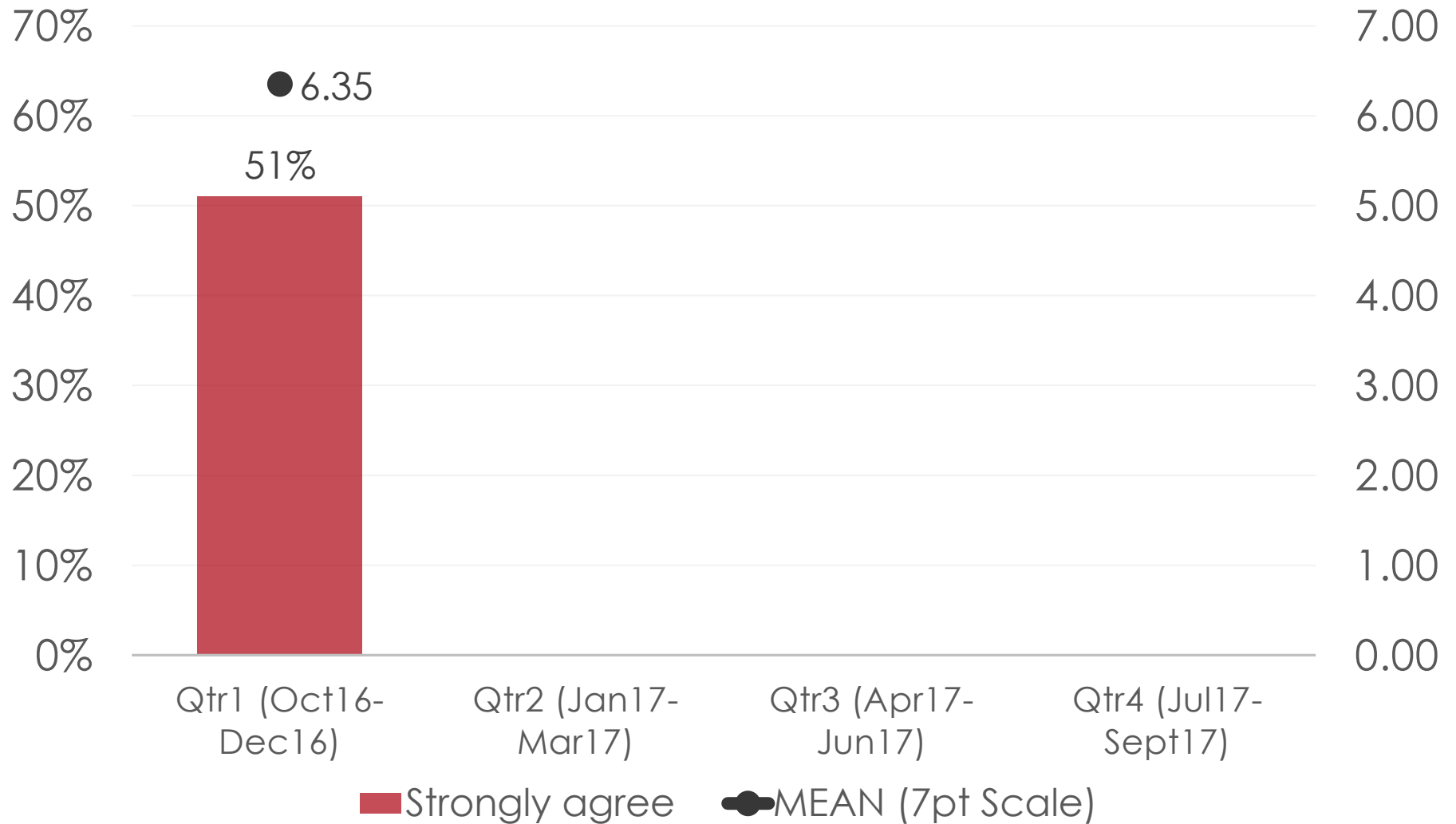
Tour drivers were professional



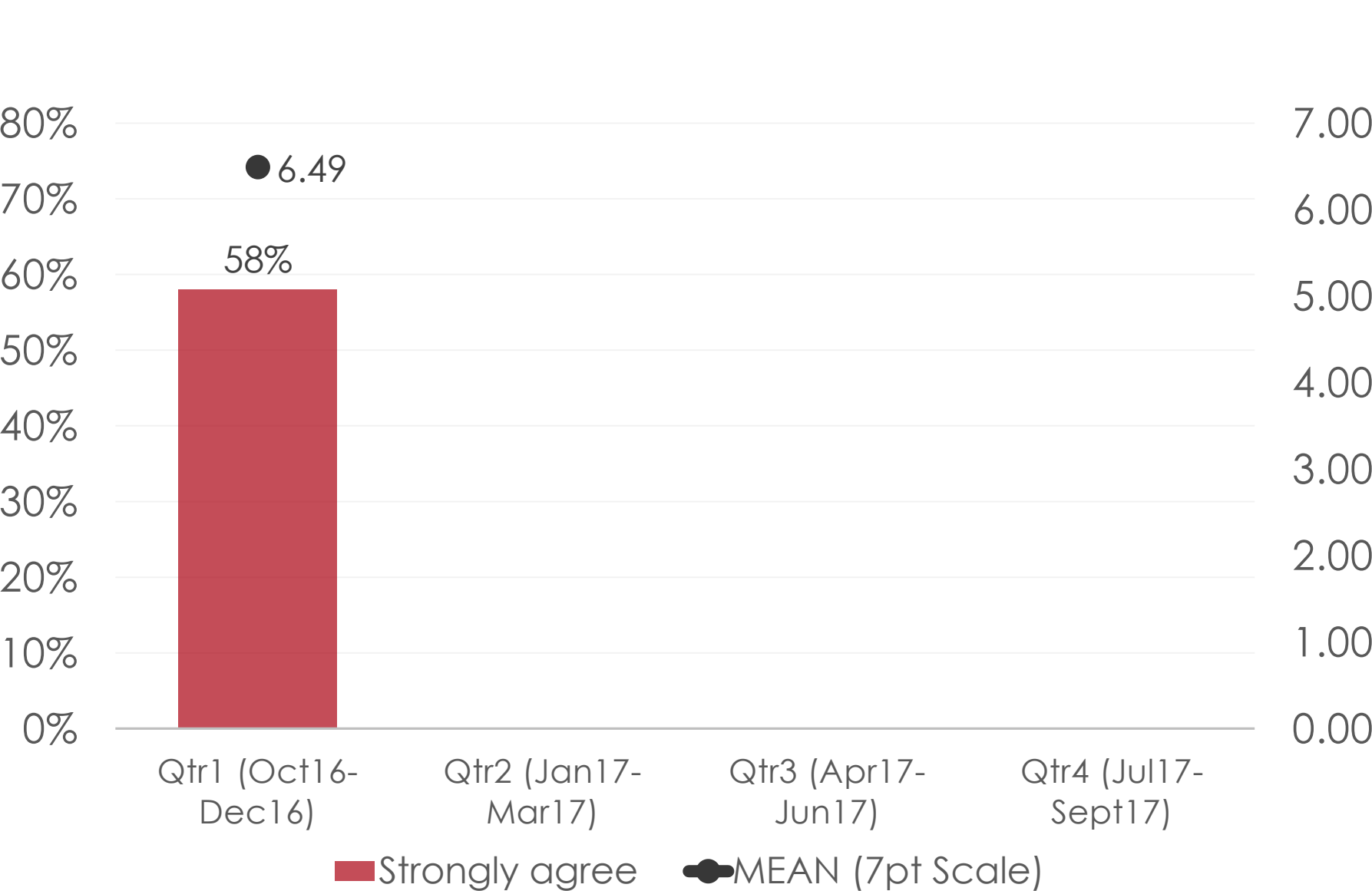
Taxi drivers were professional



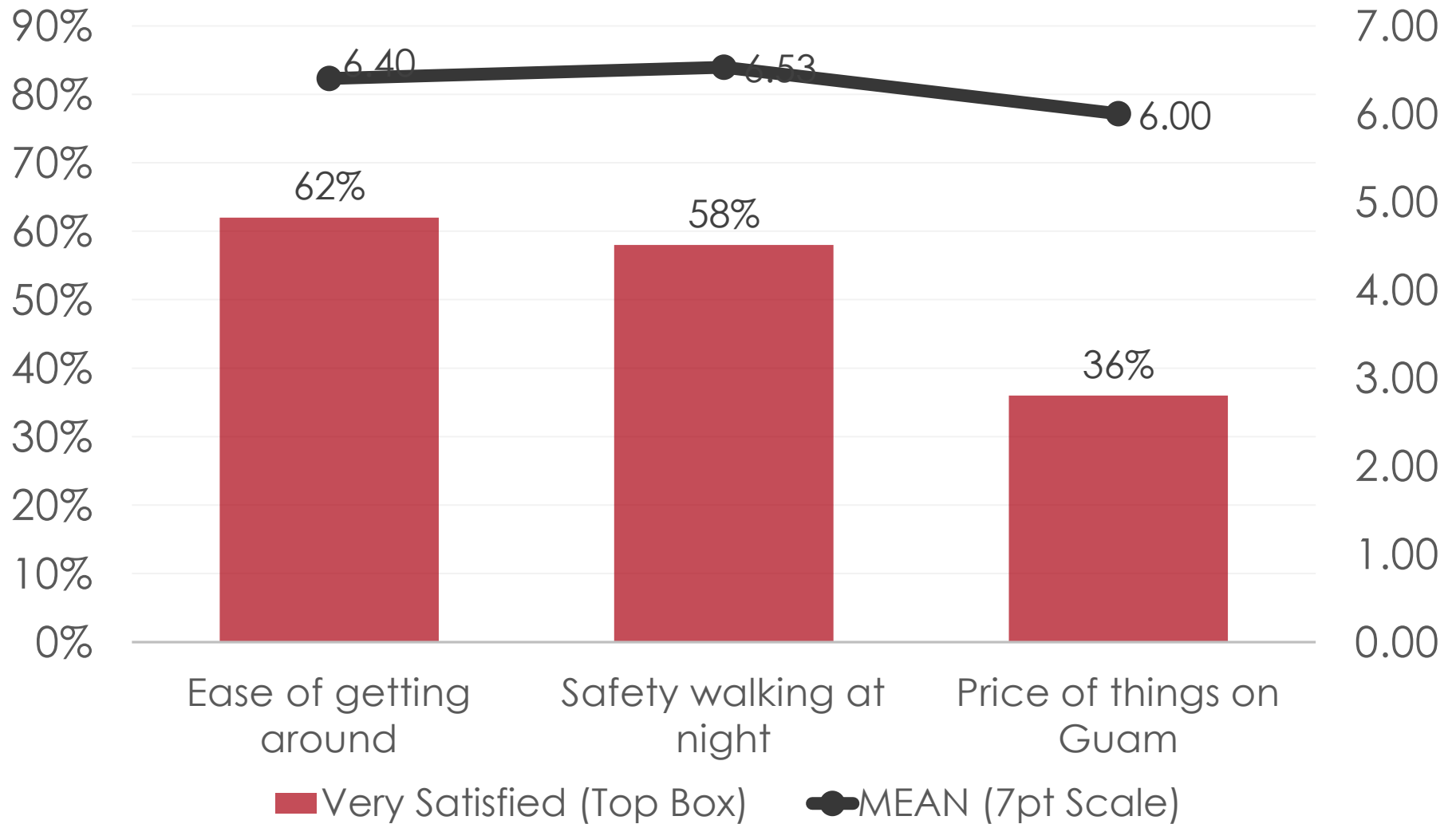
Taxis were clean



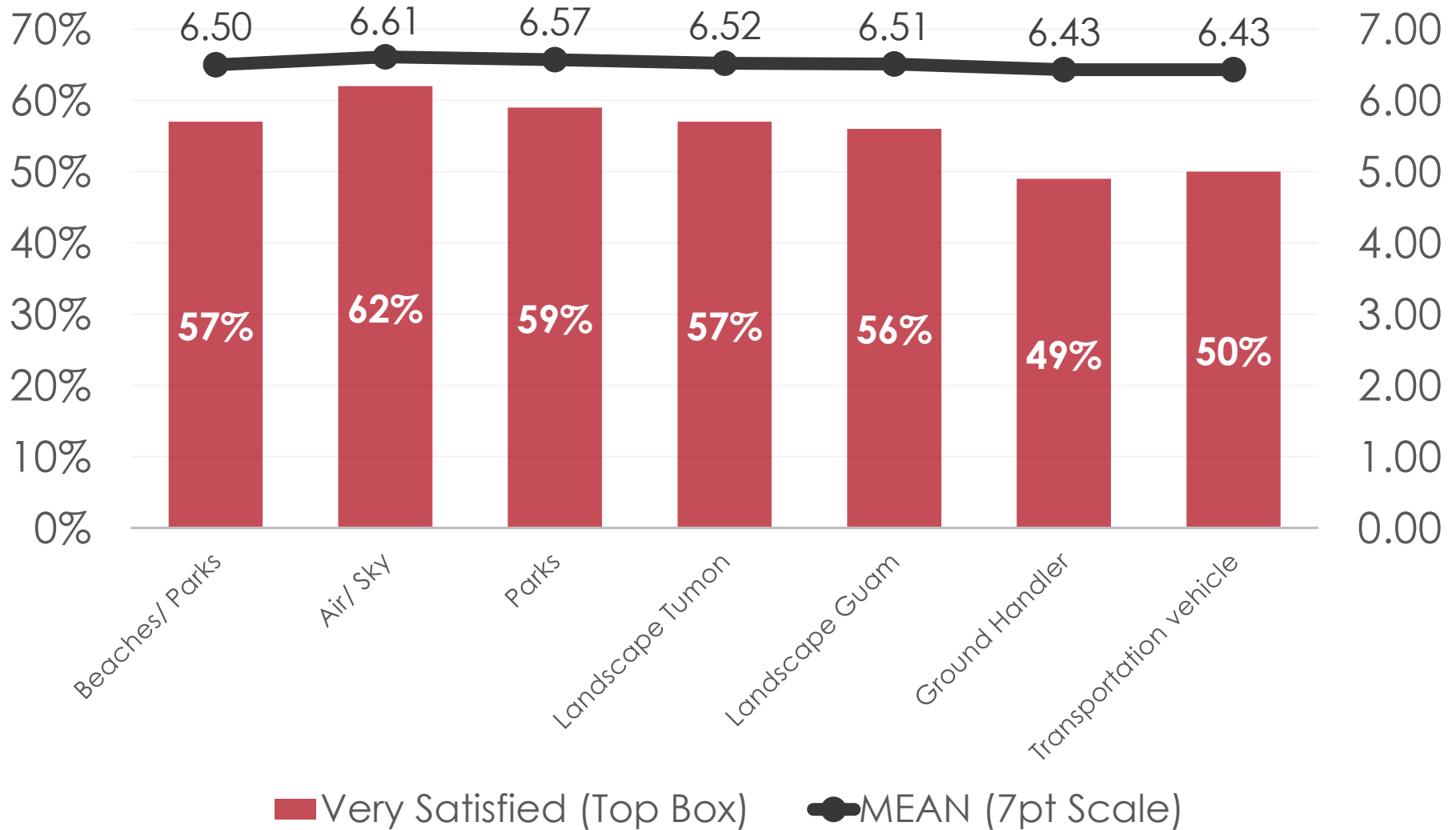
Guam airport was clean



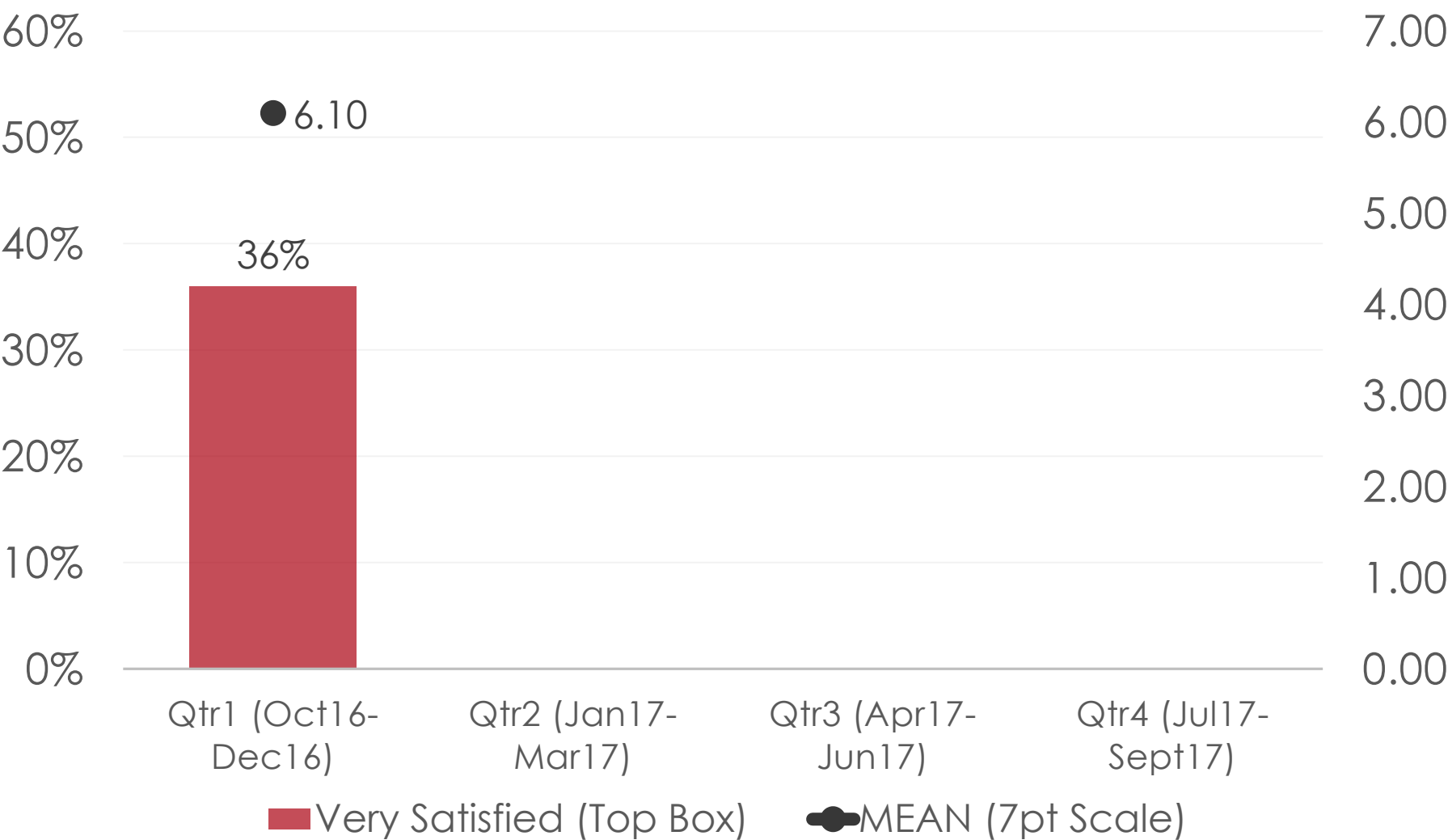
GENERAL SATISFACTION



GENERAL SATISFACTION – Quality/ Cleanliness

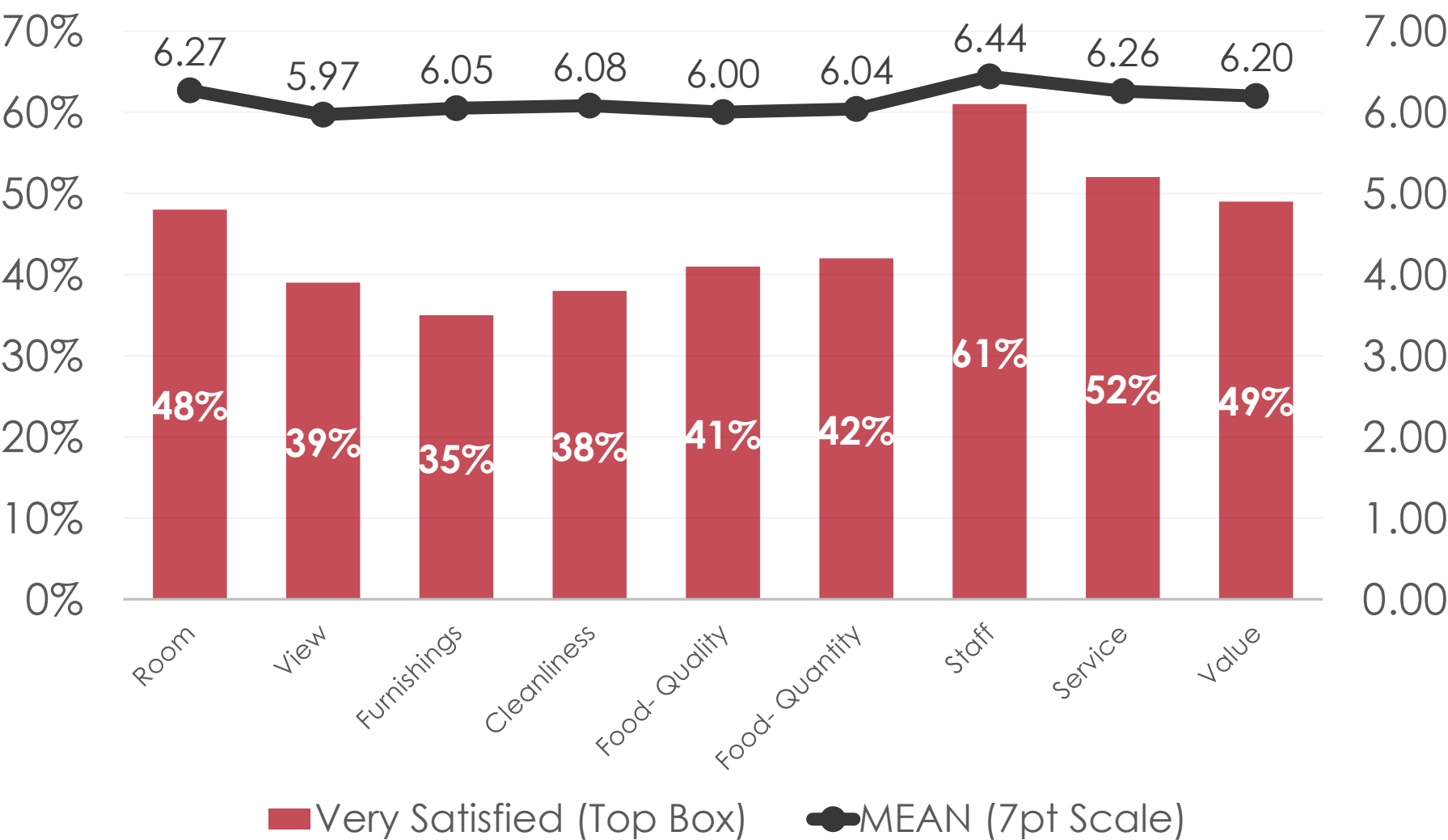


ACCOMMODATIONS – OVERALL SATISFACTION

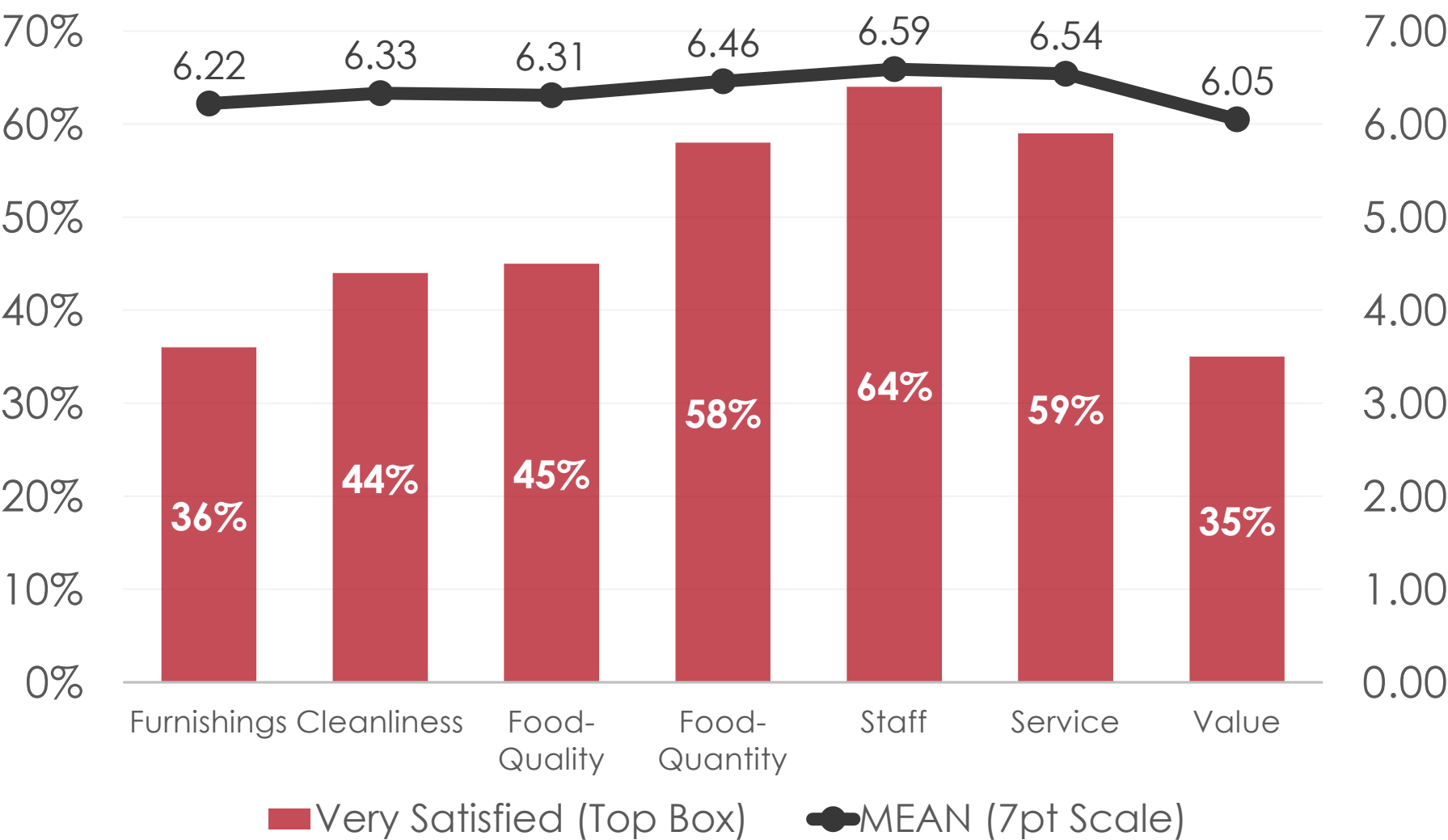


ACCOMMODATIONS –

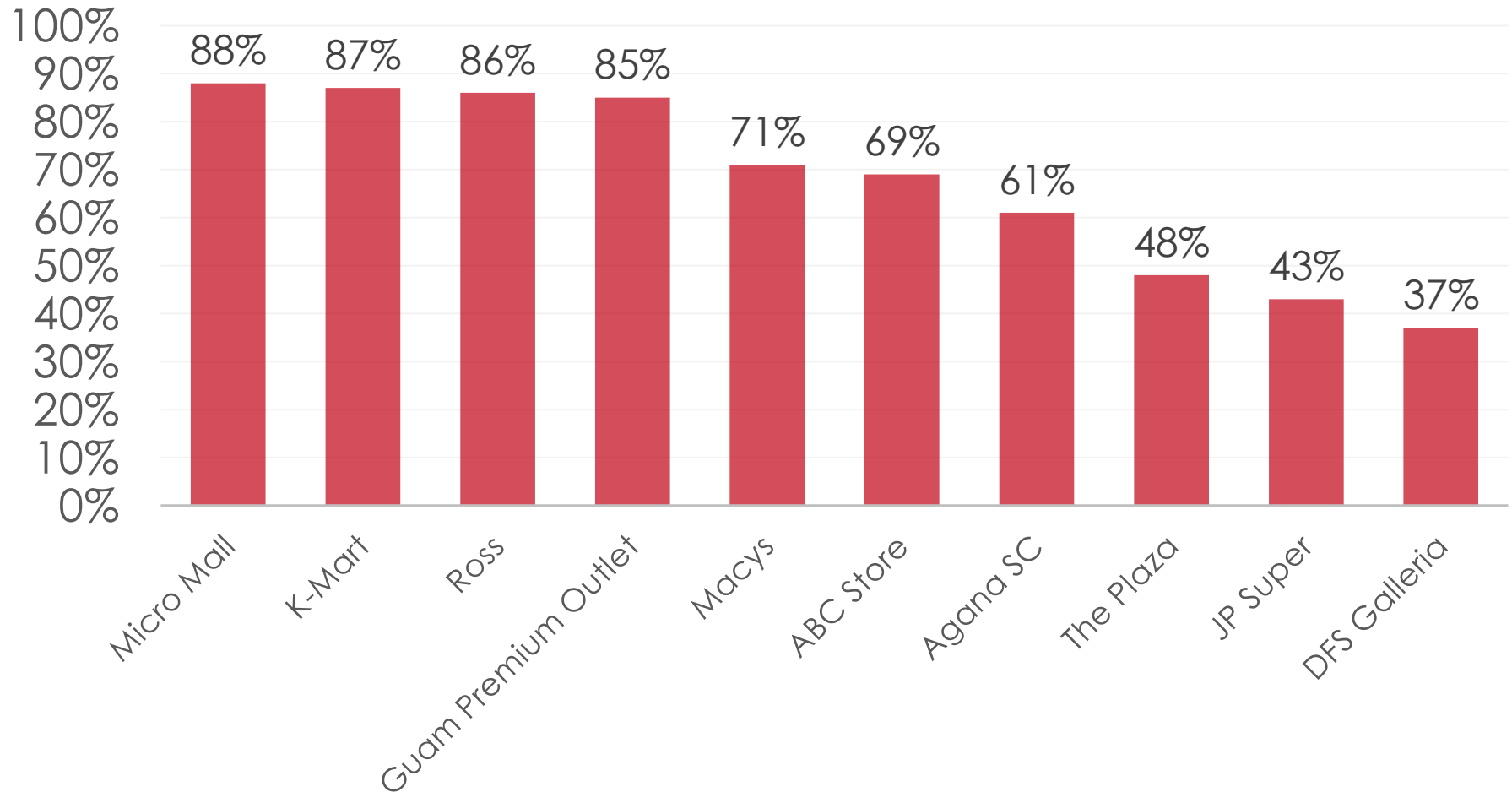
Satisfaction by Category



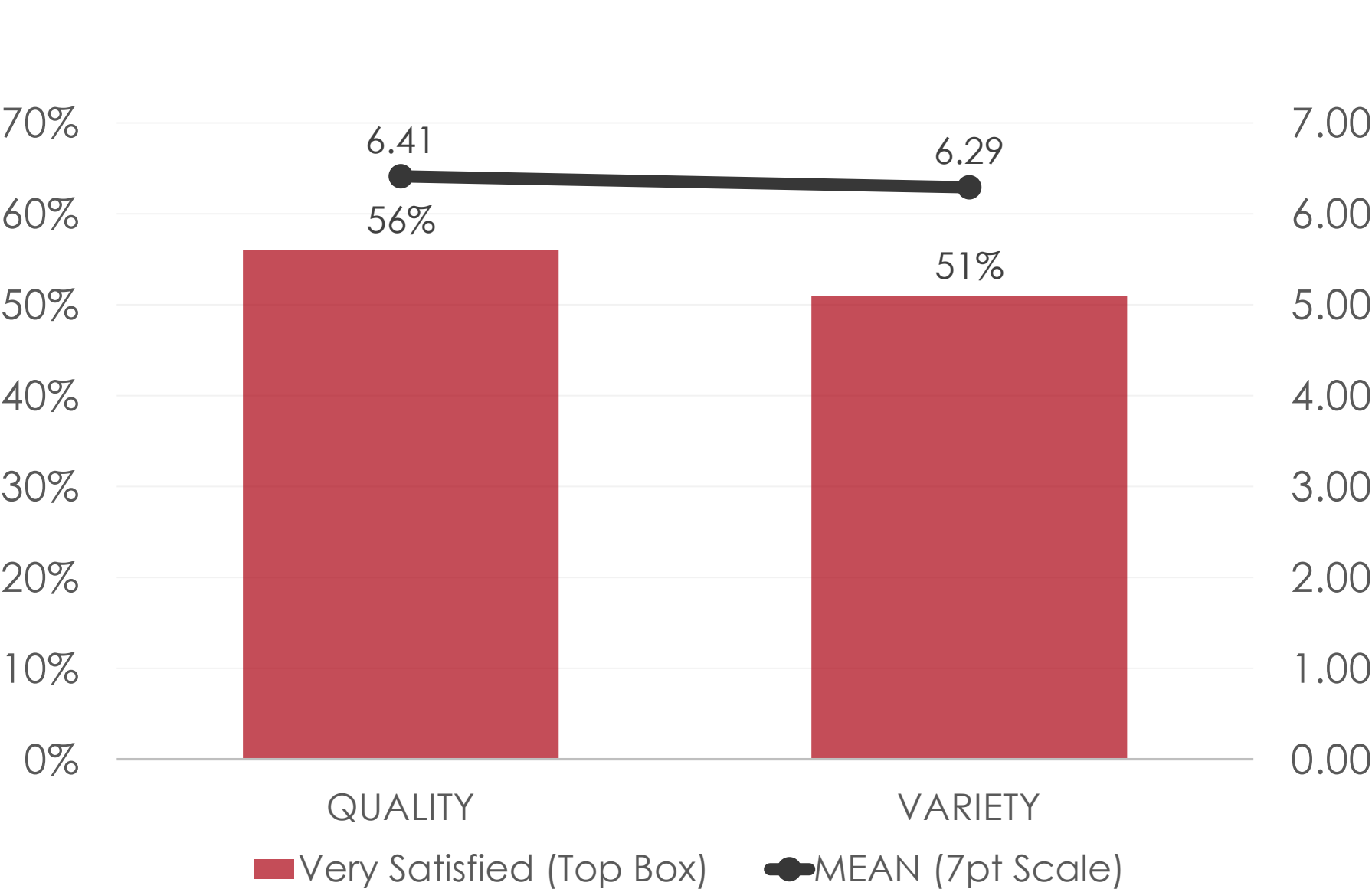
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



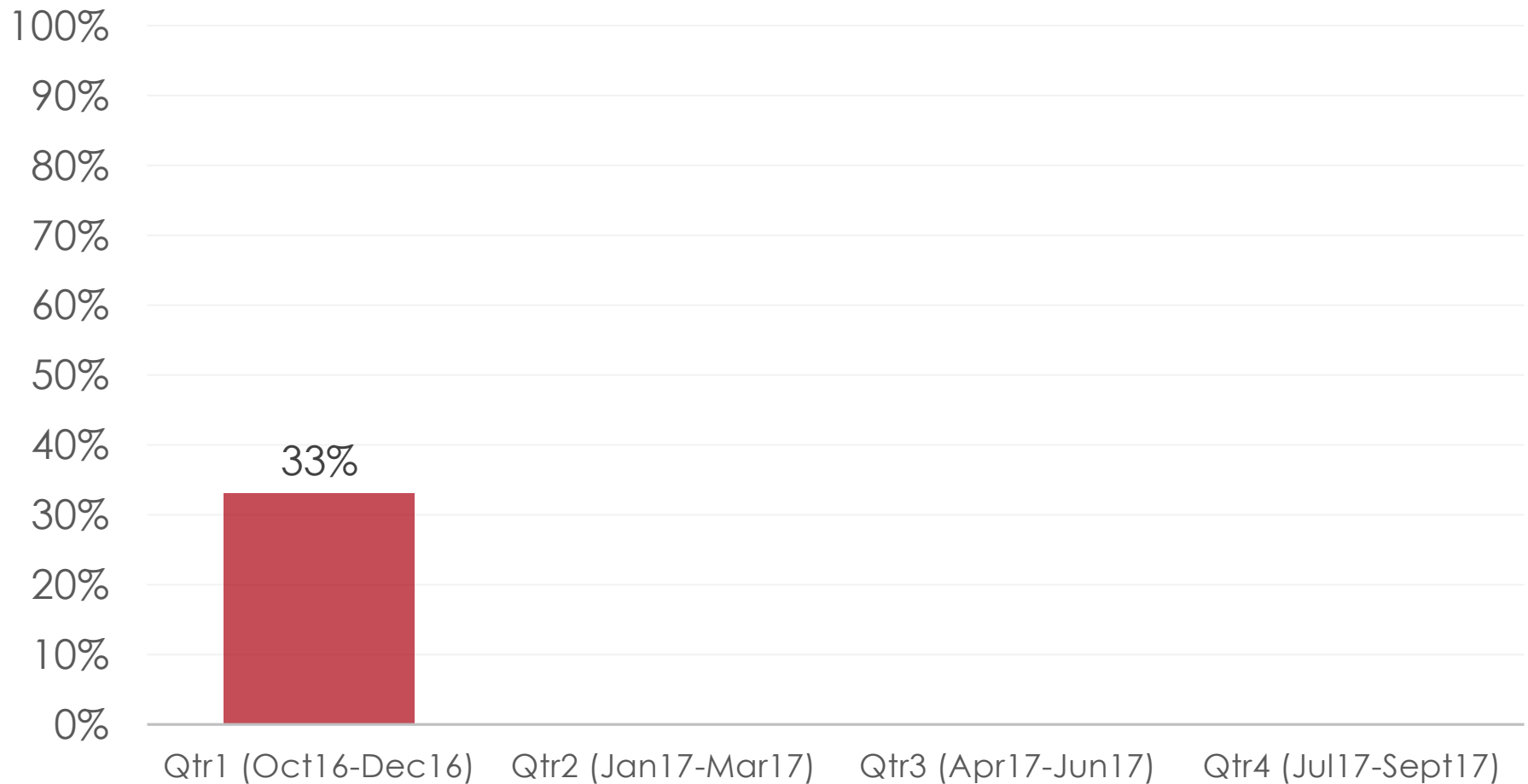
Shopping Malls/ Stores (Top Responses)



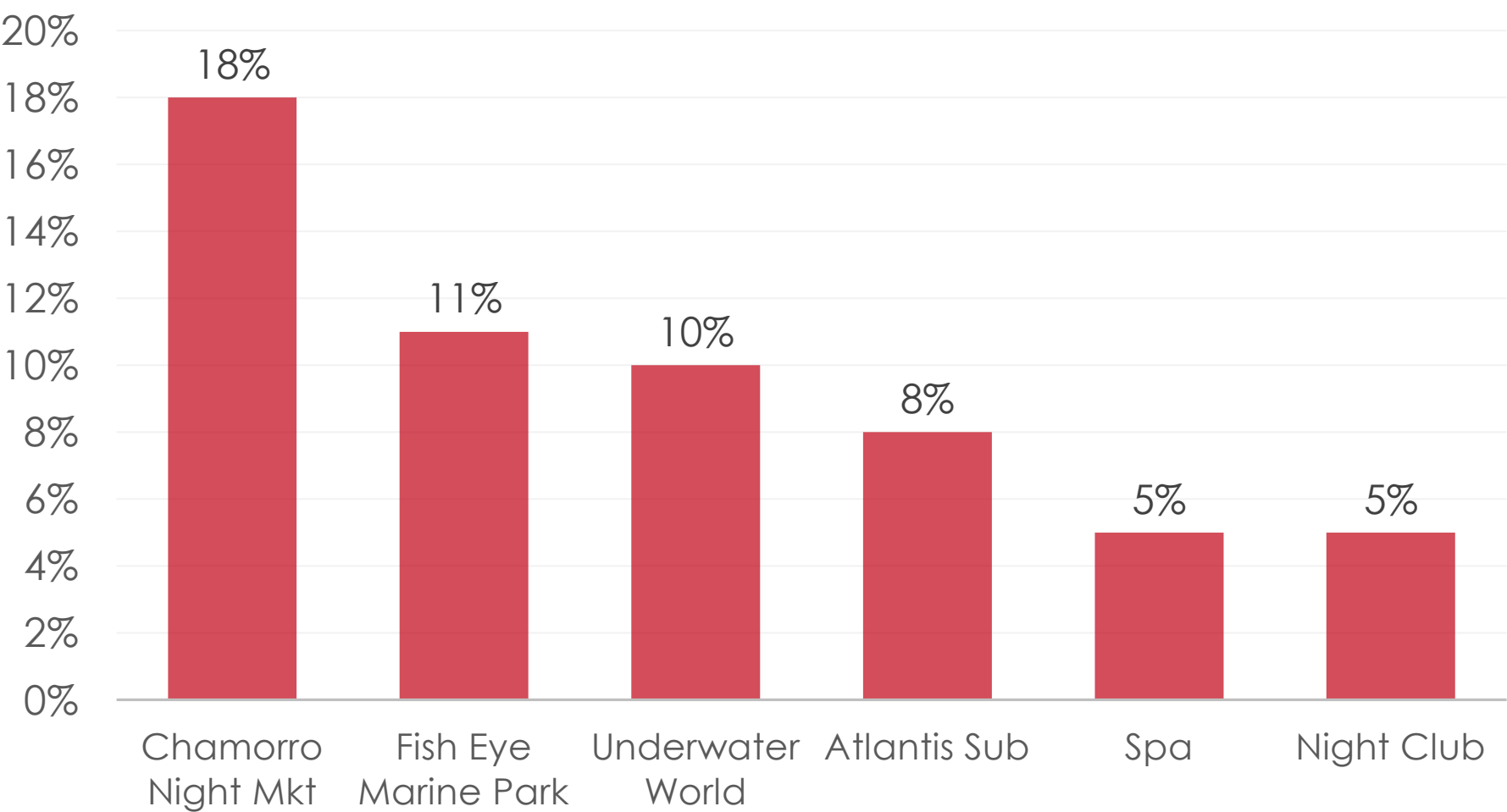
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

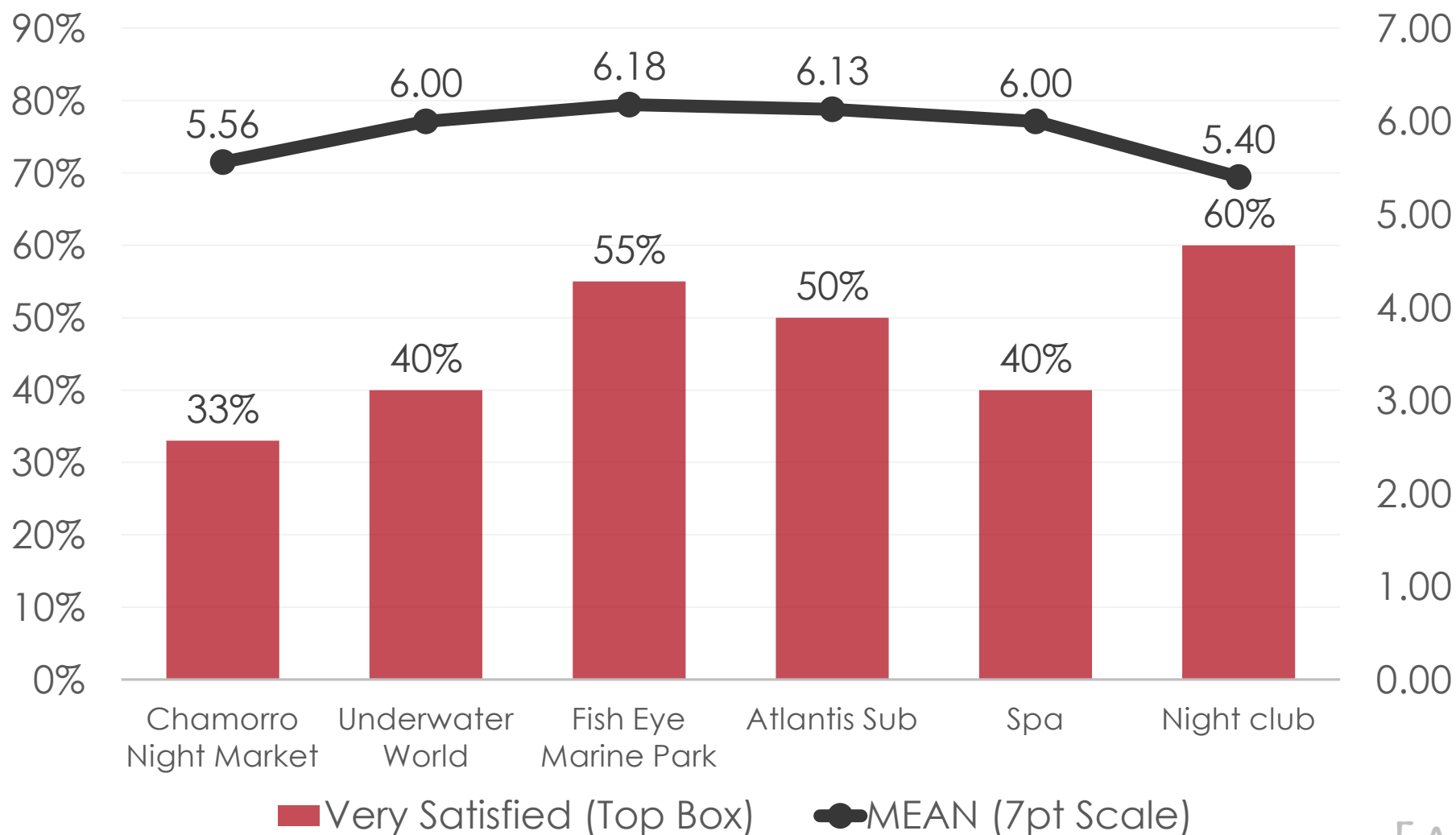


Optional Tour Participation (Top Responses)

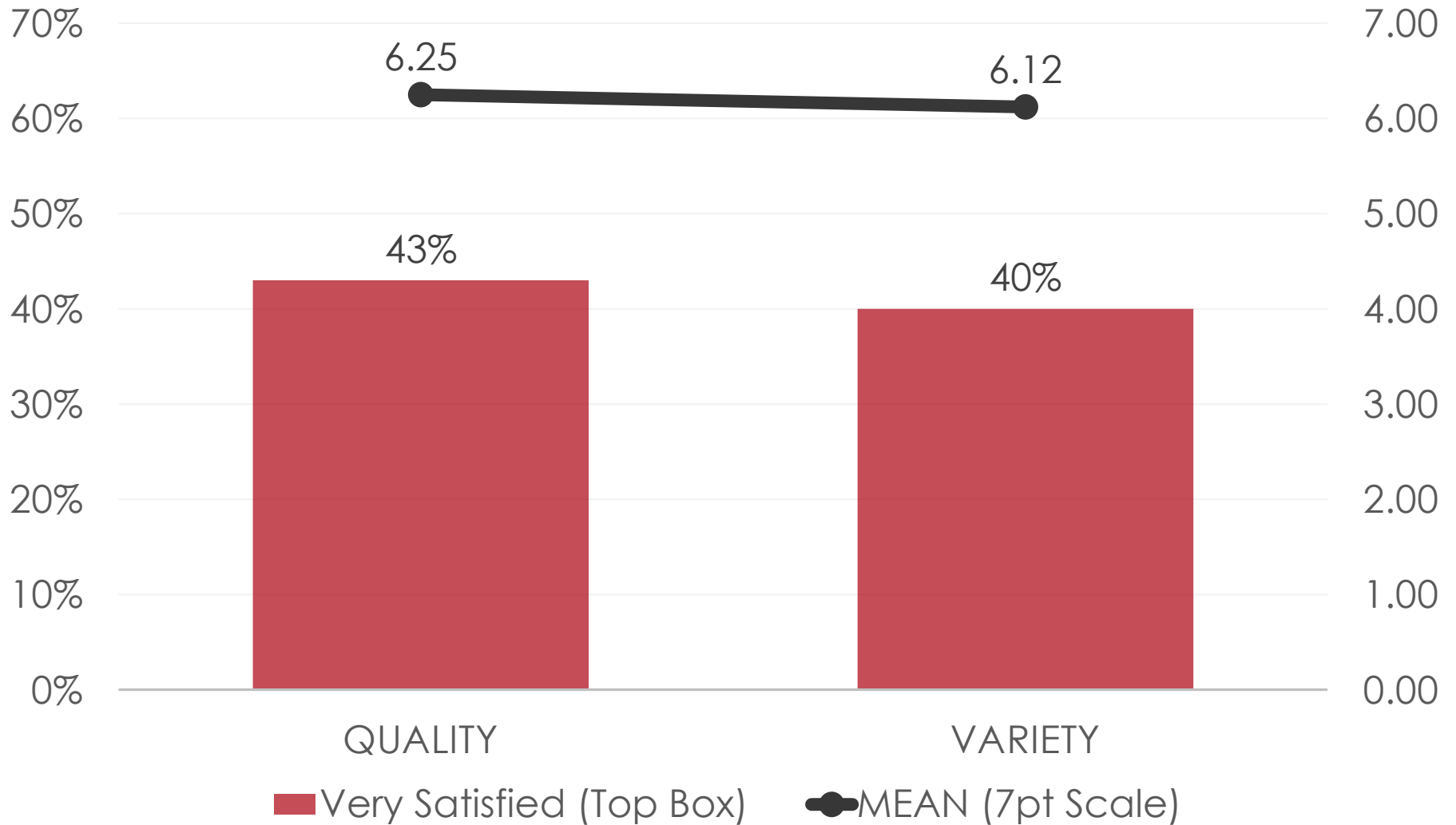


Optional Tour Satisfaction

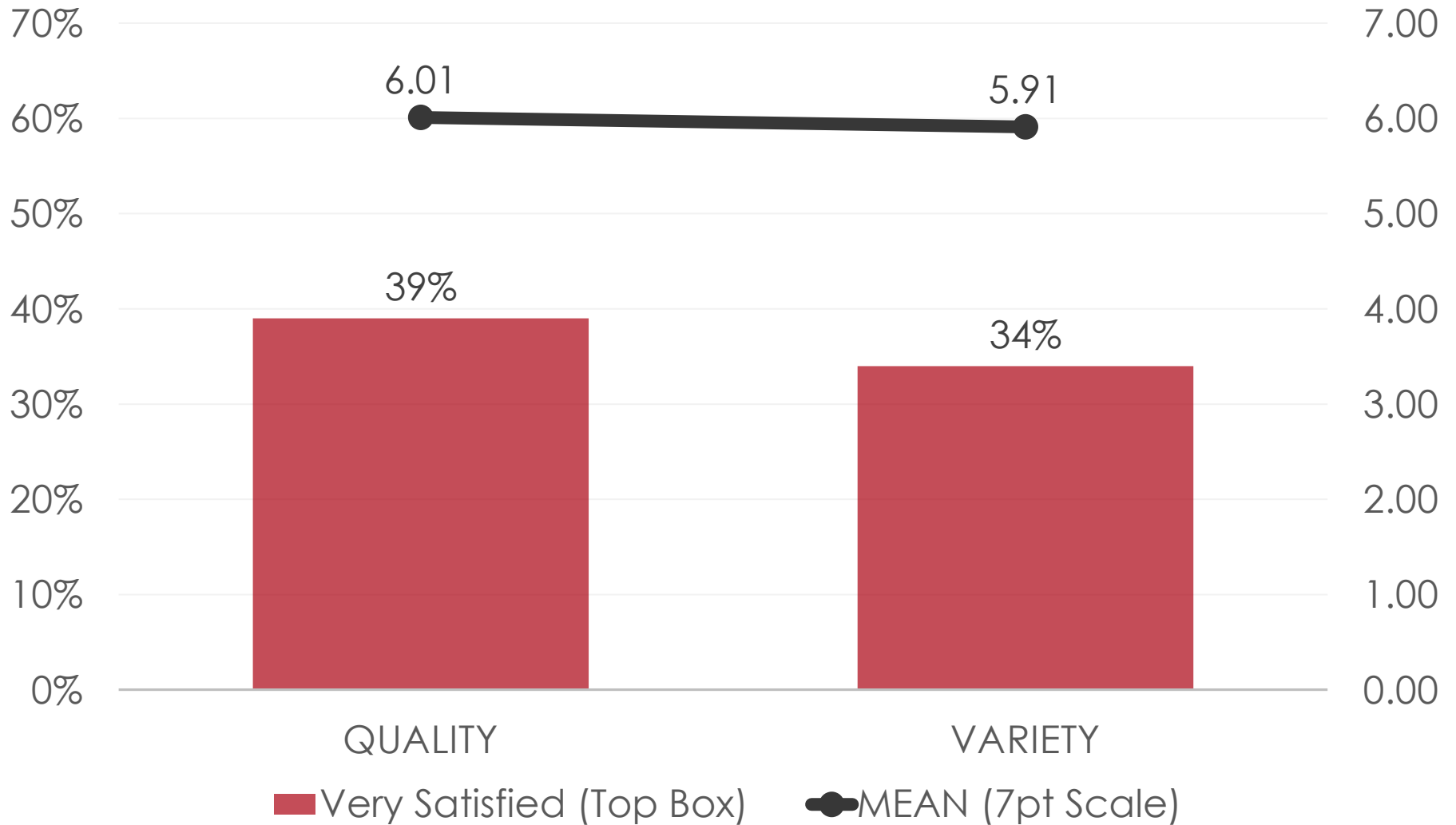
Top Responses only - Participation (5%+)



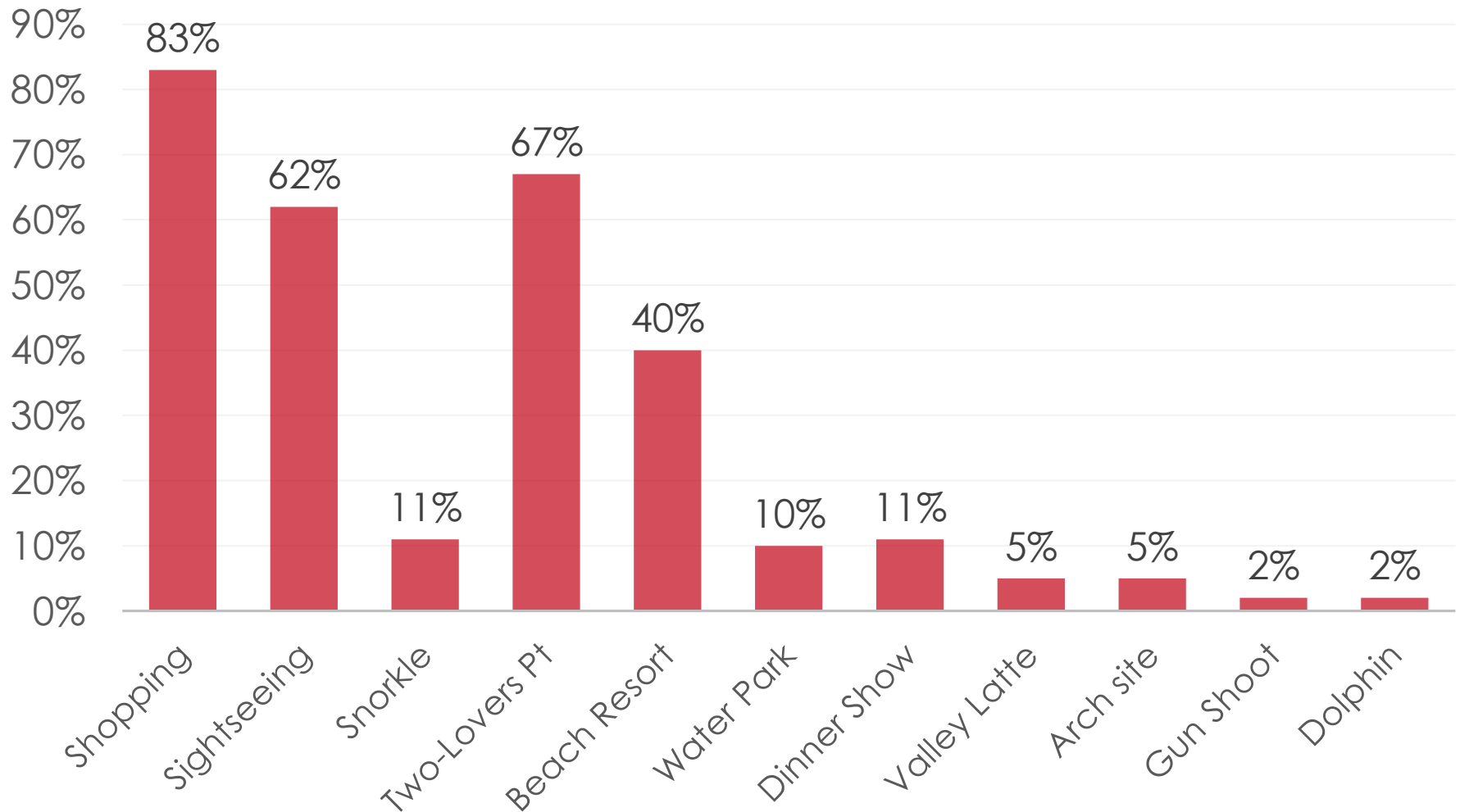
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION



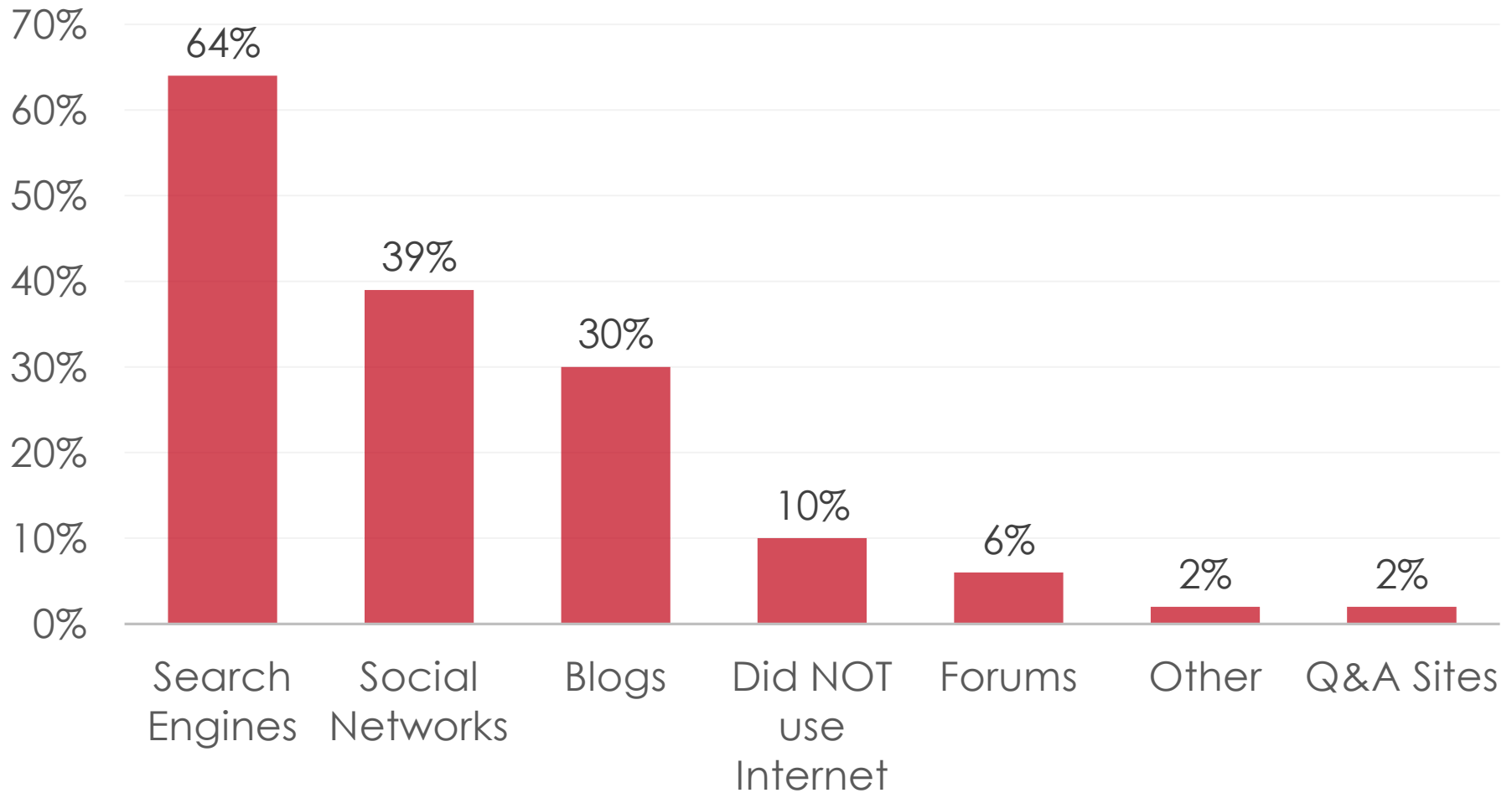
Activities Participation (Top Responses)



SECTION 5

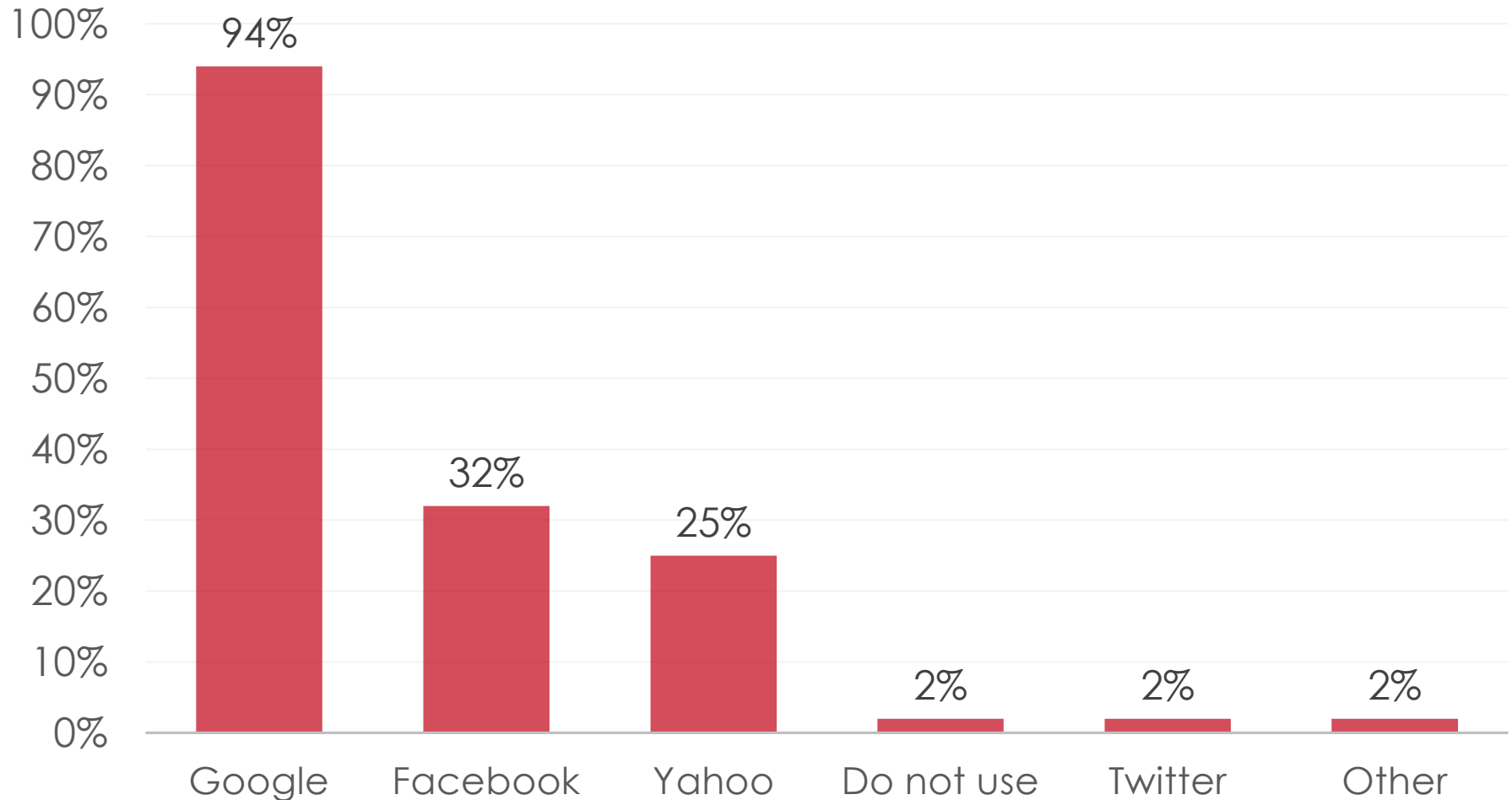
PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



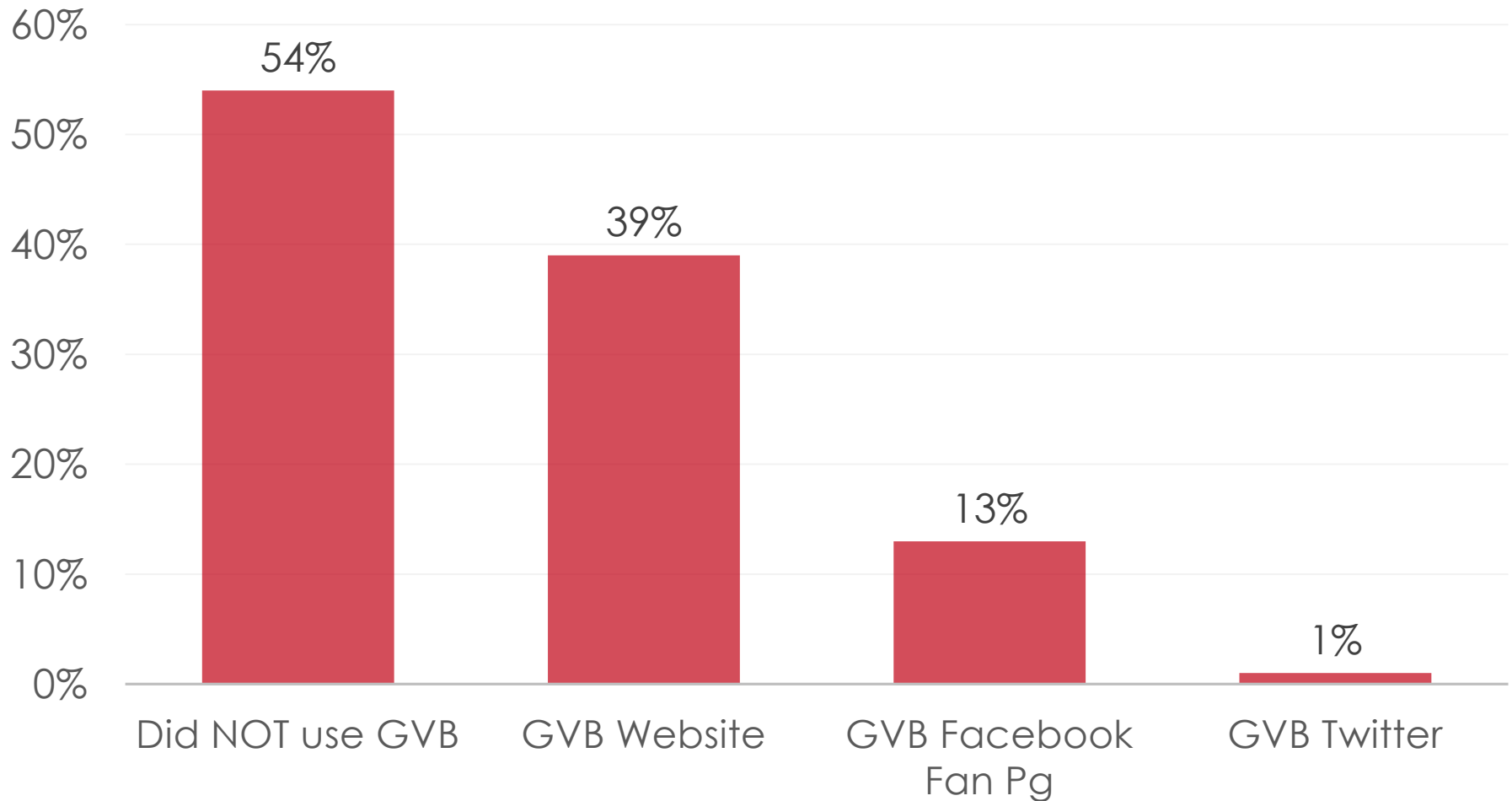
INTERNET- SOURCES OF INFORMATION

Things to do on Guam

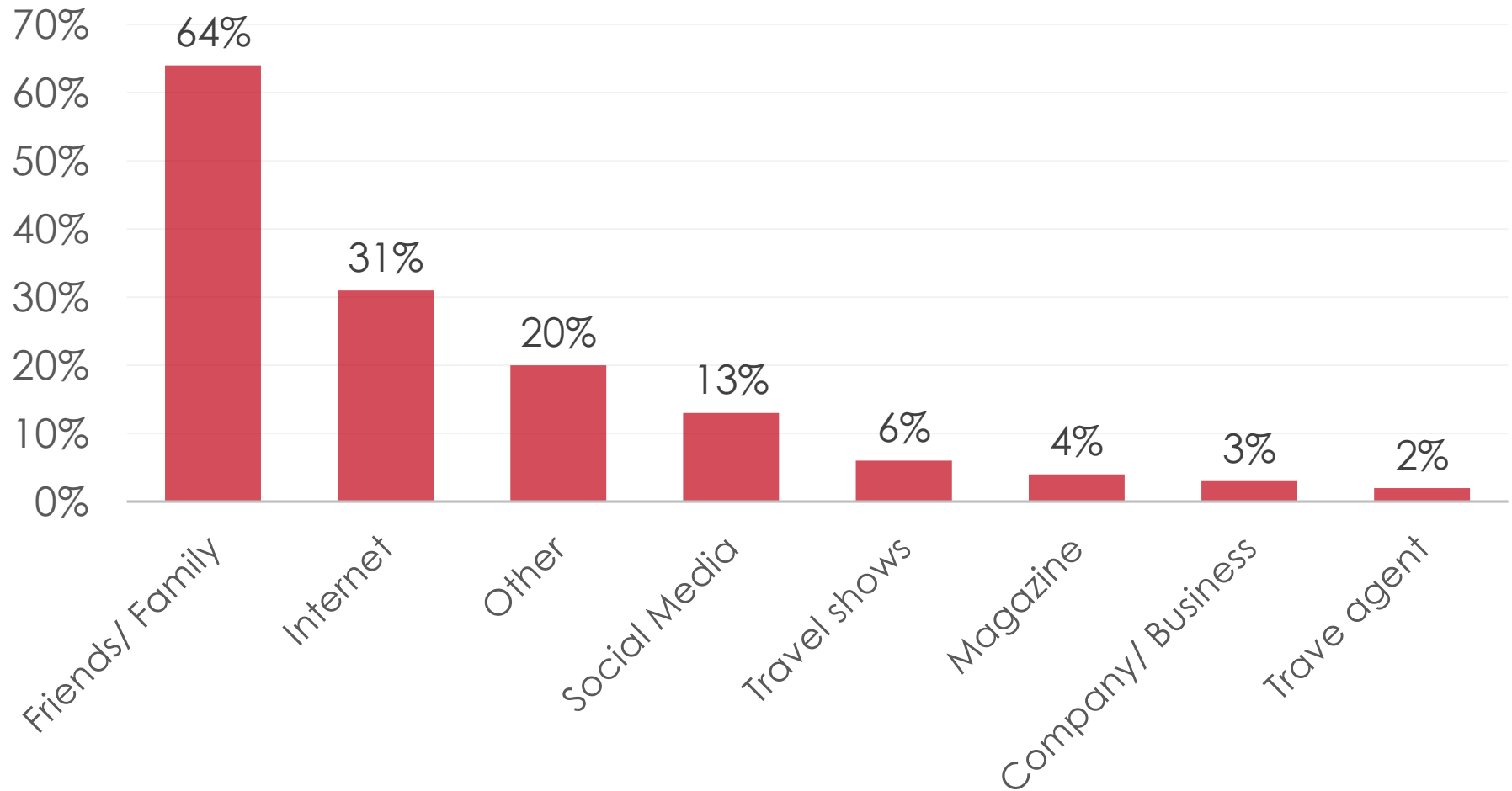


INTERNET- SOURCES OF INFORMATION

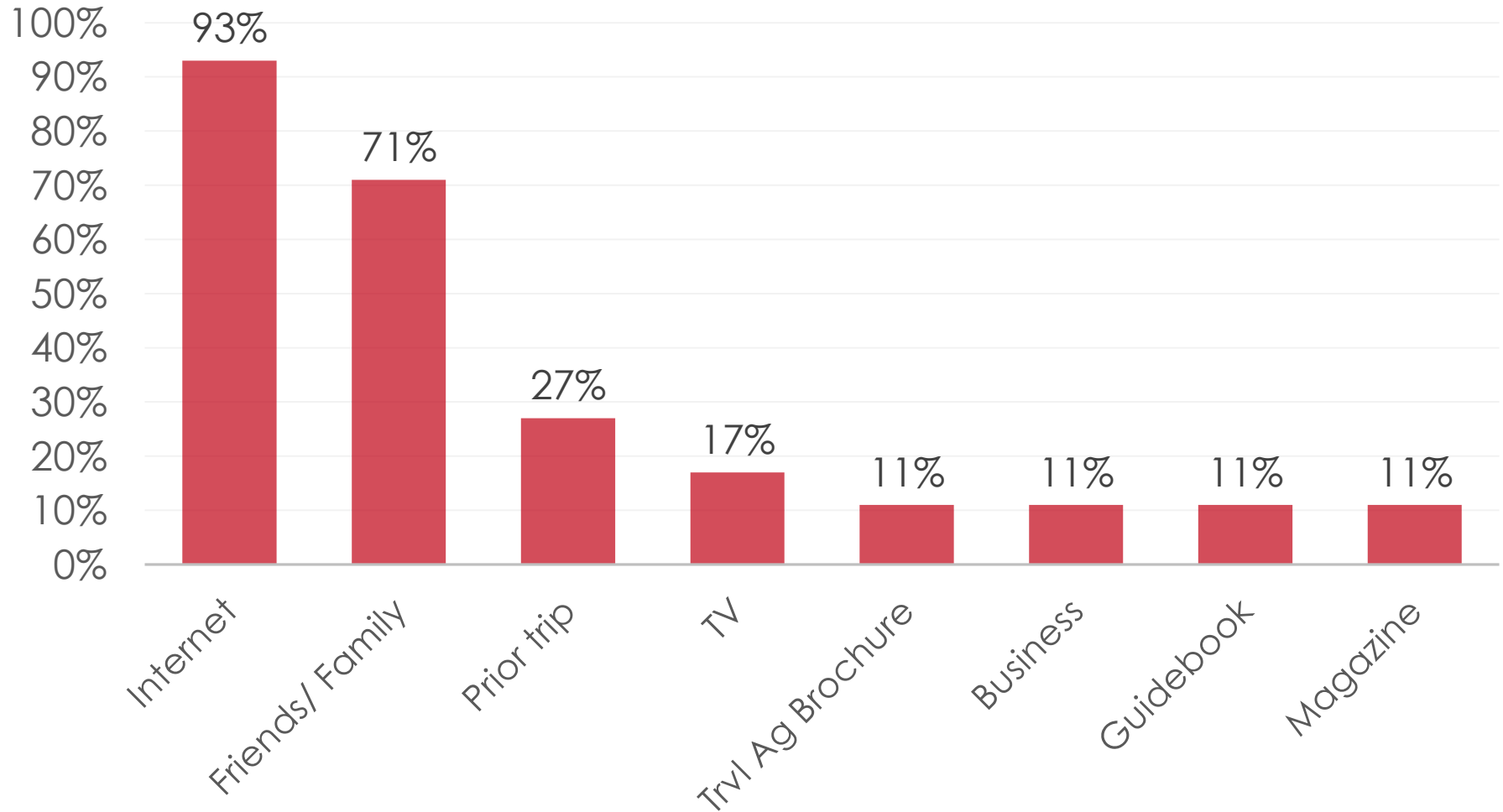
GVB



TRAVEL MOTIVATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

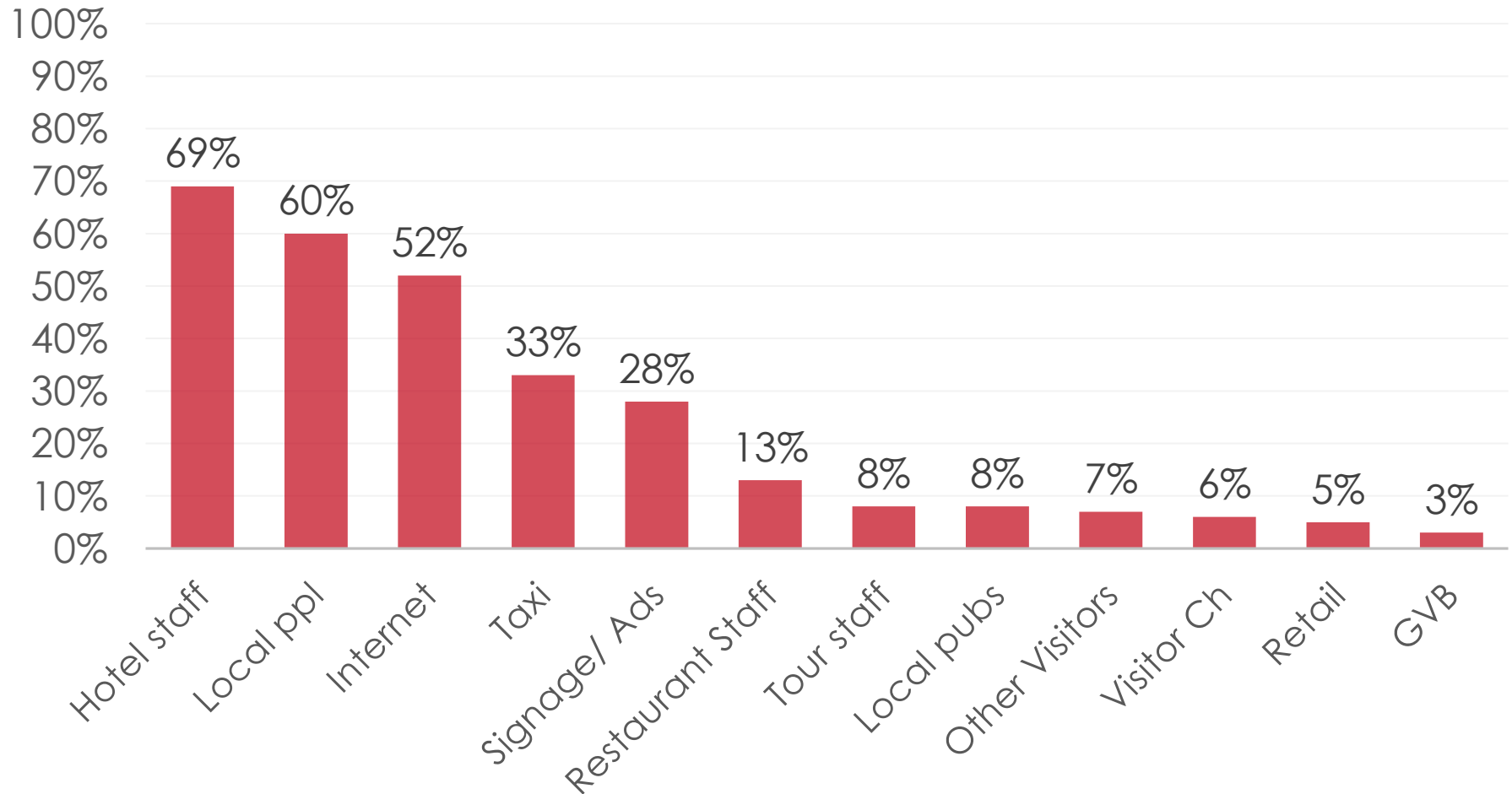
Q1 Please select the top 3 sources of information you used to find out about Guam before you trip.

		TOTAL	FAMILY	FIT	LEISURE
		-	-	-	-
Q1	Internet	93%	91%	92%	96%
	Friend/ Relative	71%	66%	70%	69%
	Prior Trip	27%	32%	28%	23%
	TV	17%	13%	14%	14%
	Co-Worker/ Company Trvl Dept	11%	7%	9%	9%
	Travel Guidebook- Bookstore	11%	16%	13%	11%
	Travel Agent Brochure	11%	13%	13%	13%
	Magazine (Consumer)	11%	18%	16%	11%
	Travel Trade Show	5%	7%	6%	6%
	GVB Promo	5%	5%	5%	7%
	Newspaper	4%	4%	2%	4%
	Consumer Trvl Show	1%			
	Theater Ad	1%	2%		1%
	GVB Office	1%	2%	2%	1%
	Total	98	56	64	70

Prepared by QMark Research

ONISLE

SOURCES OF INFORMATION



ON-ISLE SOURCES OF INFORMATION – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q2 Please select the top 3 sources of information you used to find out about Guam while you were here.

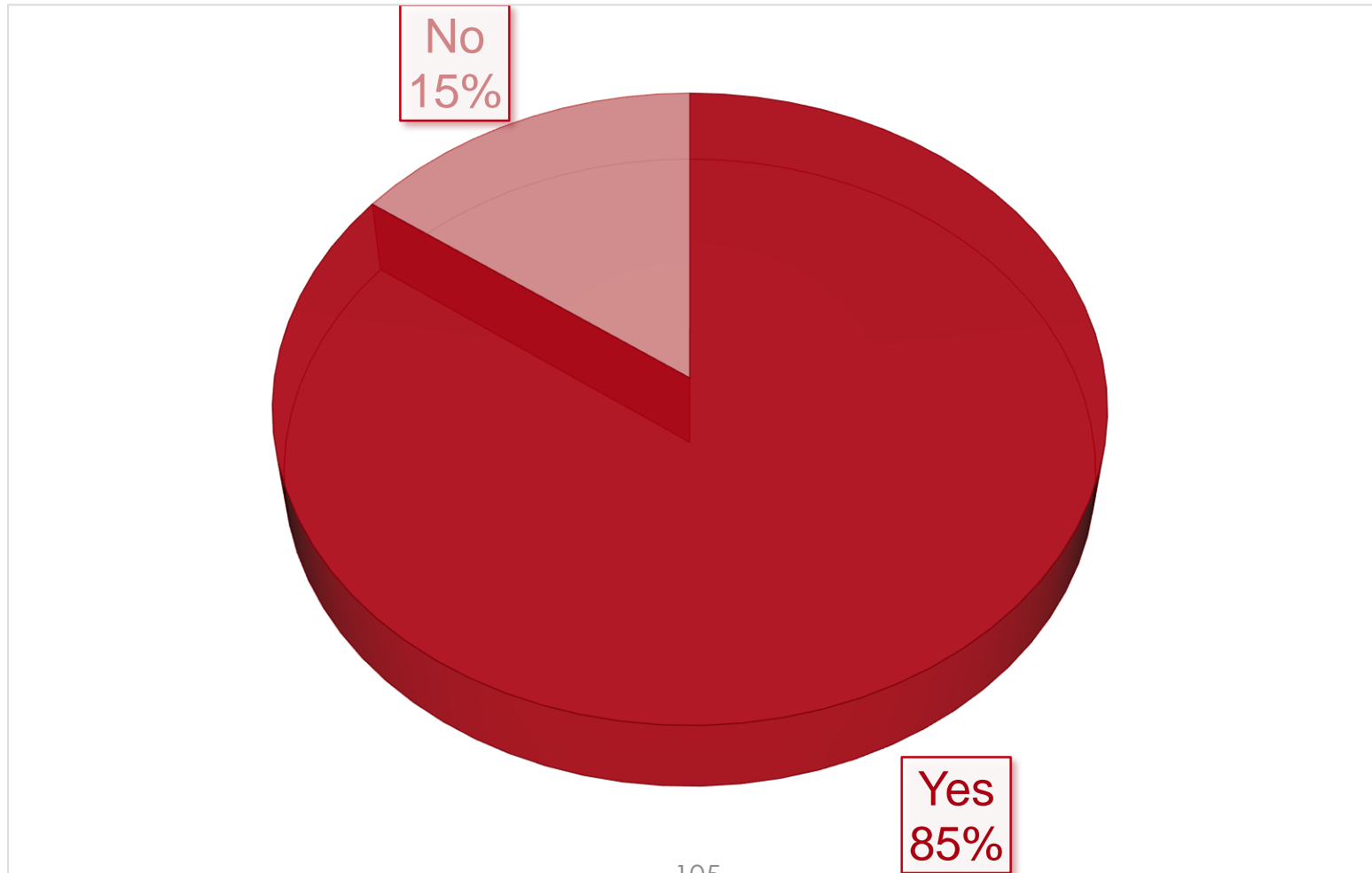
		TOTAL	FAMILY	FIT	LEISURE
		-	-	-	-
Q2	Hotel Staff	69%	67%	66%	73%
	Local Ppl	60%	56%	59%	61%
	Internet	52%	56%	53%	54%
	Taxi Driver	33%	27%	34%	39%
	Signs/ Advertisement	28%	24%	25%	27%
	Restaurant Staff	13%	15%	16%	11%
	Local Publication	8%	7%	6%	10%
	Tour Staff	8%	9%	6%	9%
	Other Visitors	7%	9%	9%	4%
	Other	6%	7%	9%	7%
	Visitor Channel	6%	4%	3%	3%
	Retail Staff	5%	4%	6%	6%
	GVB	3%	5%	5%	3%
	Total	96	55	64	70

Prepared by QMark Research

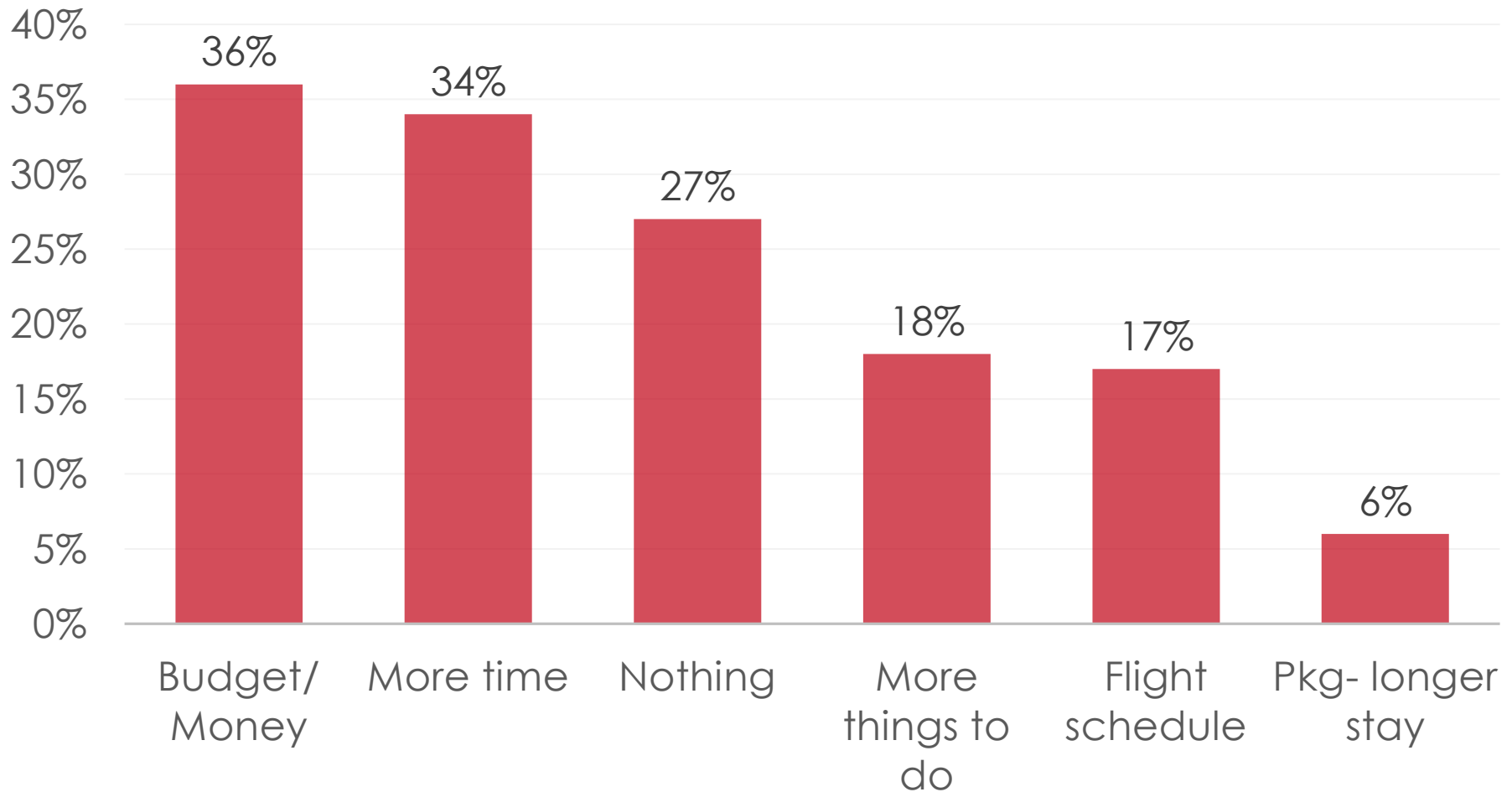
SECTION 6

FUTURE TRAVEL TO GUAM

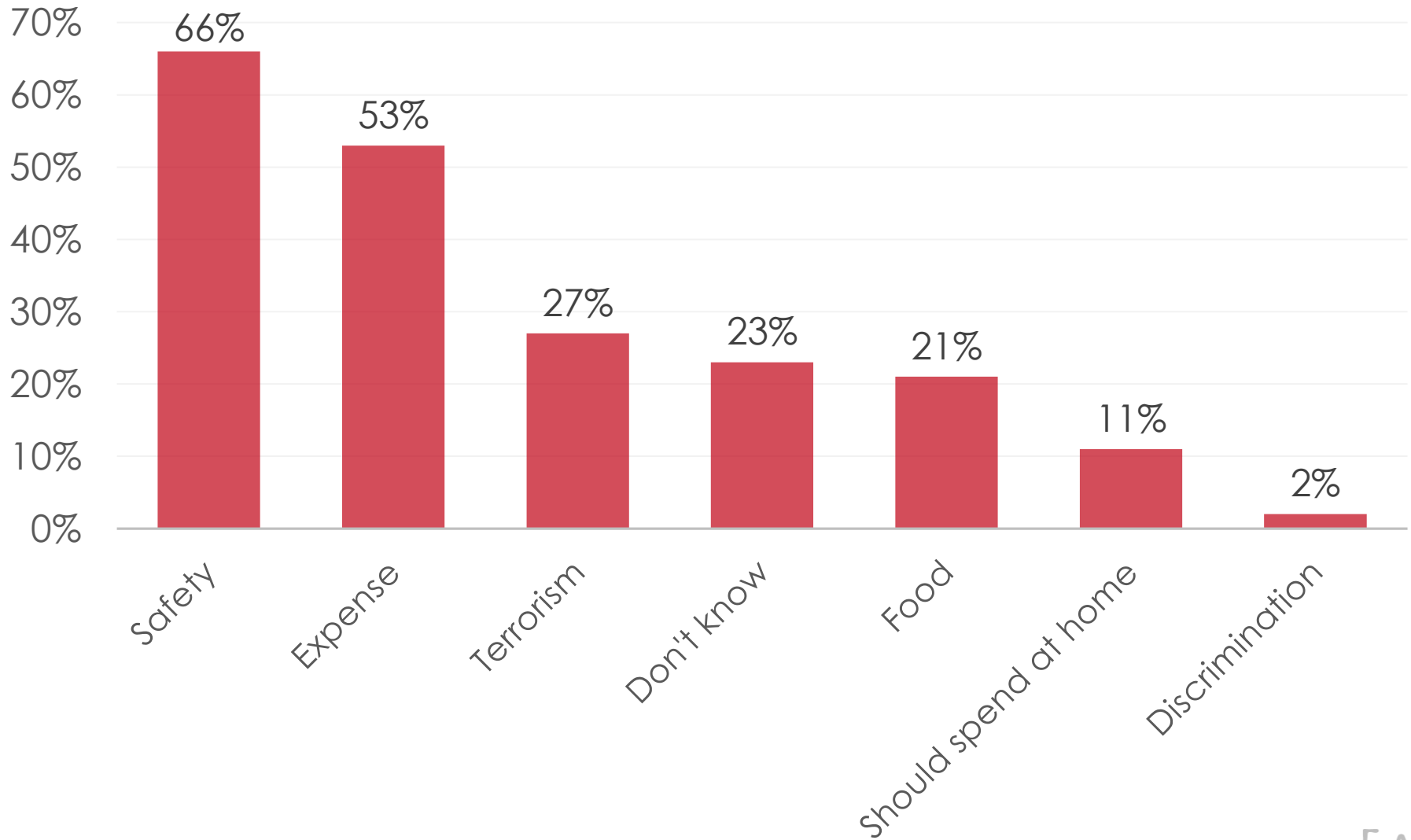
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



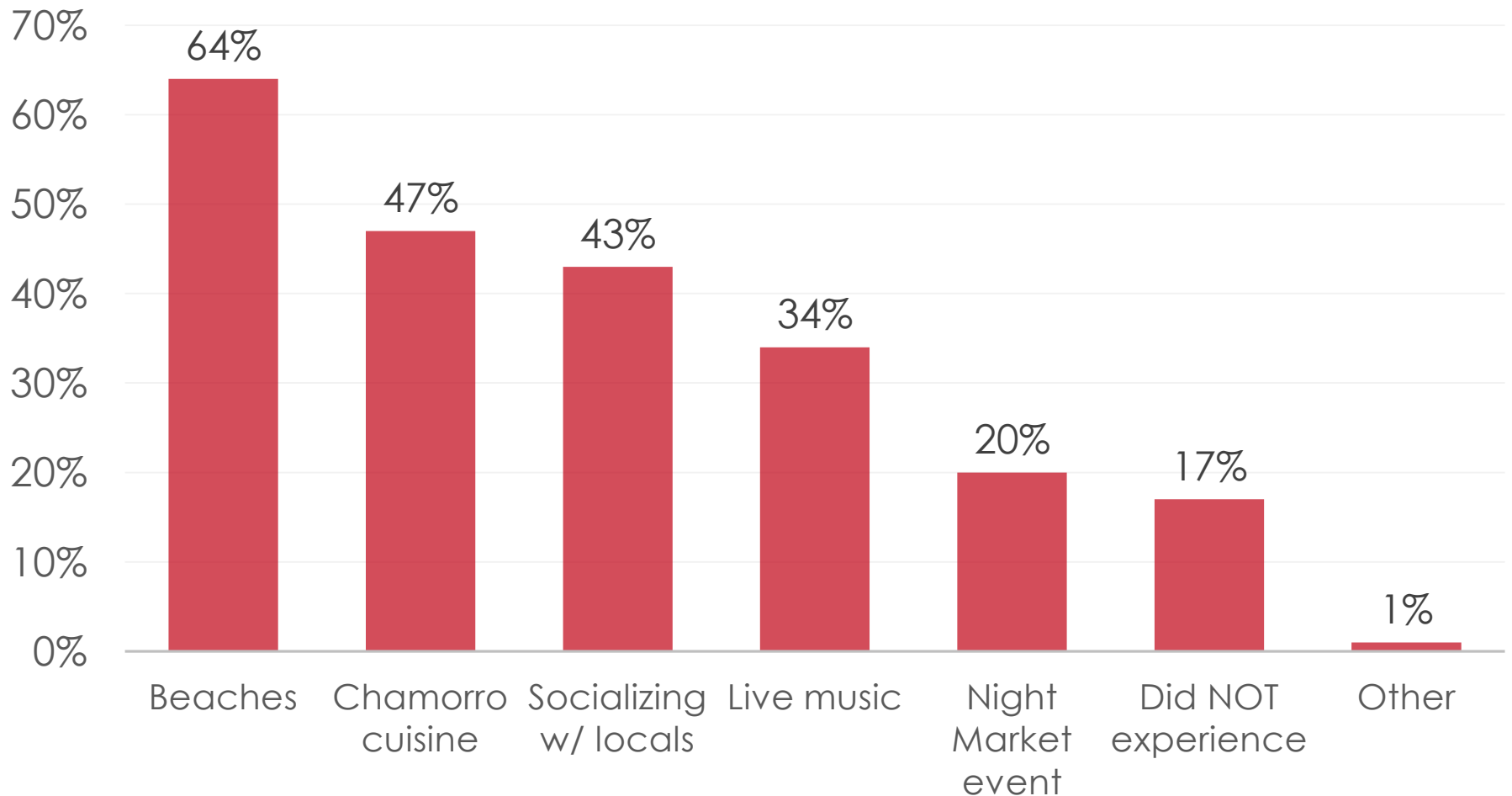
FUTURE TRAVEL CONCERNS



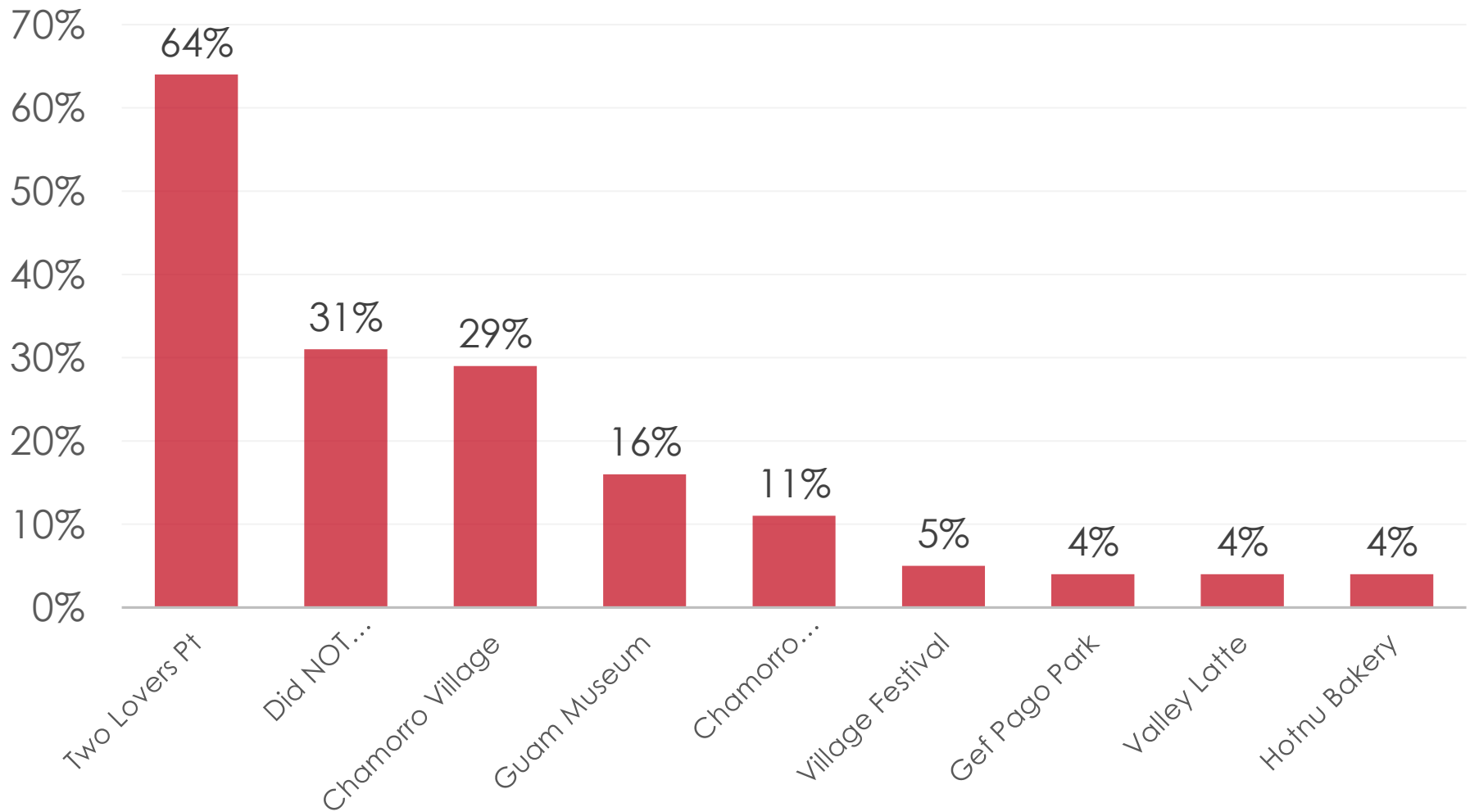
SECTION 7

GUAM CULTURE

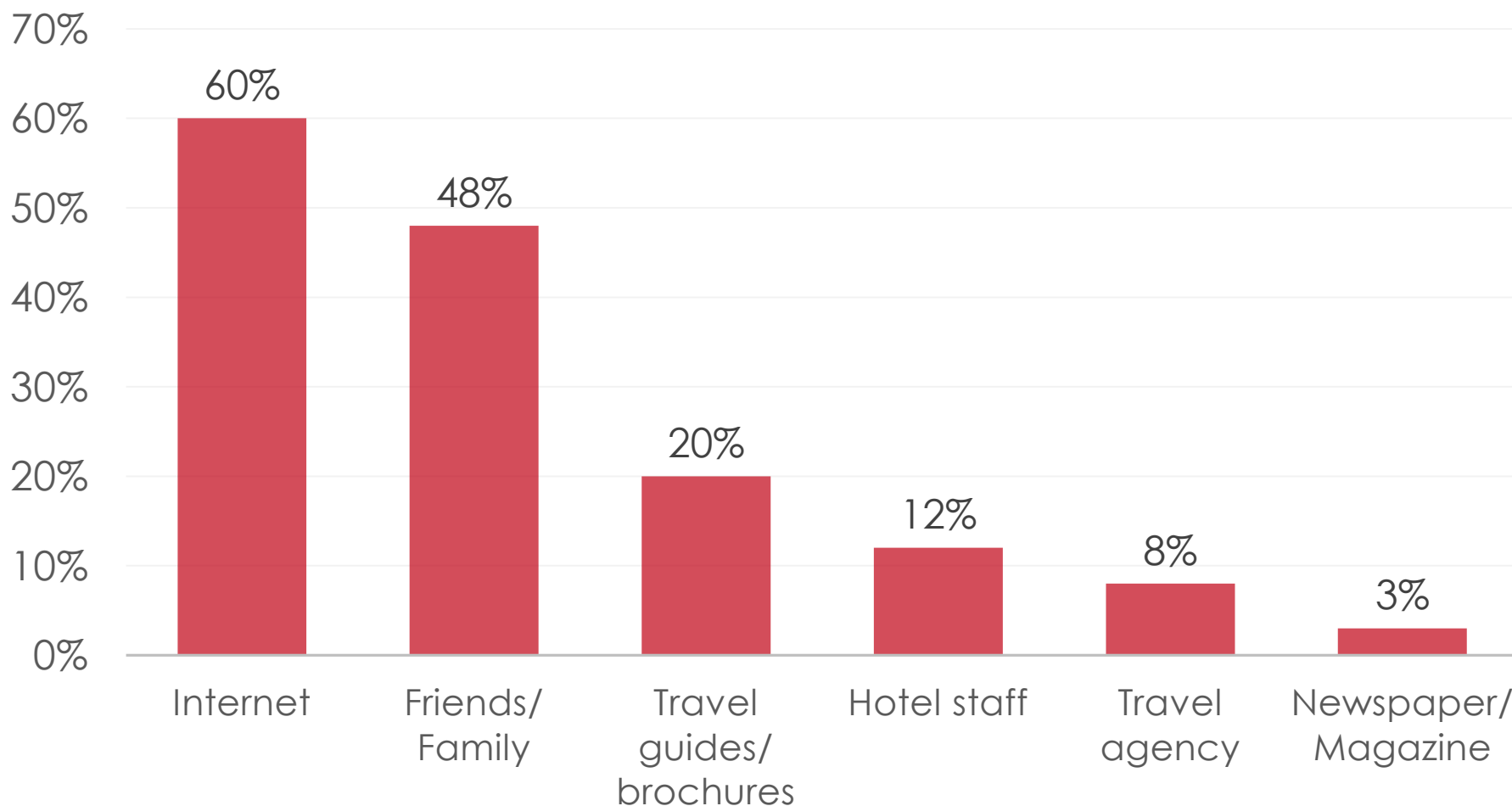
EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT



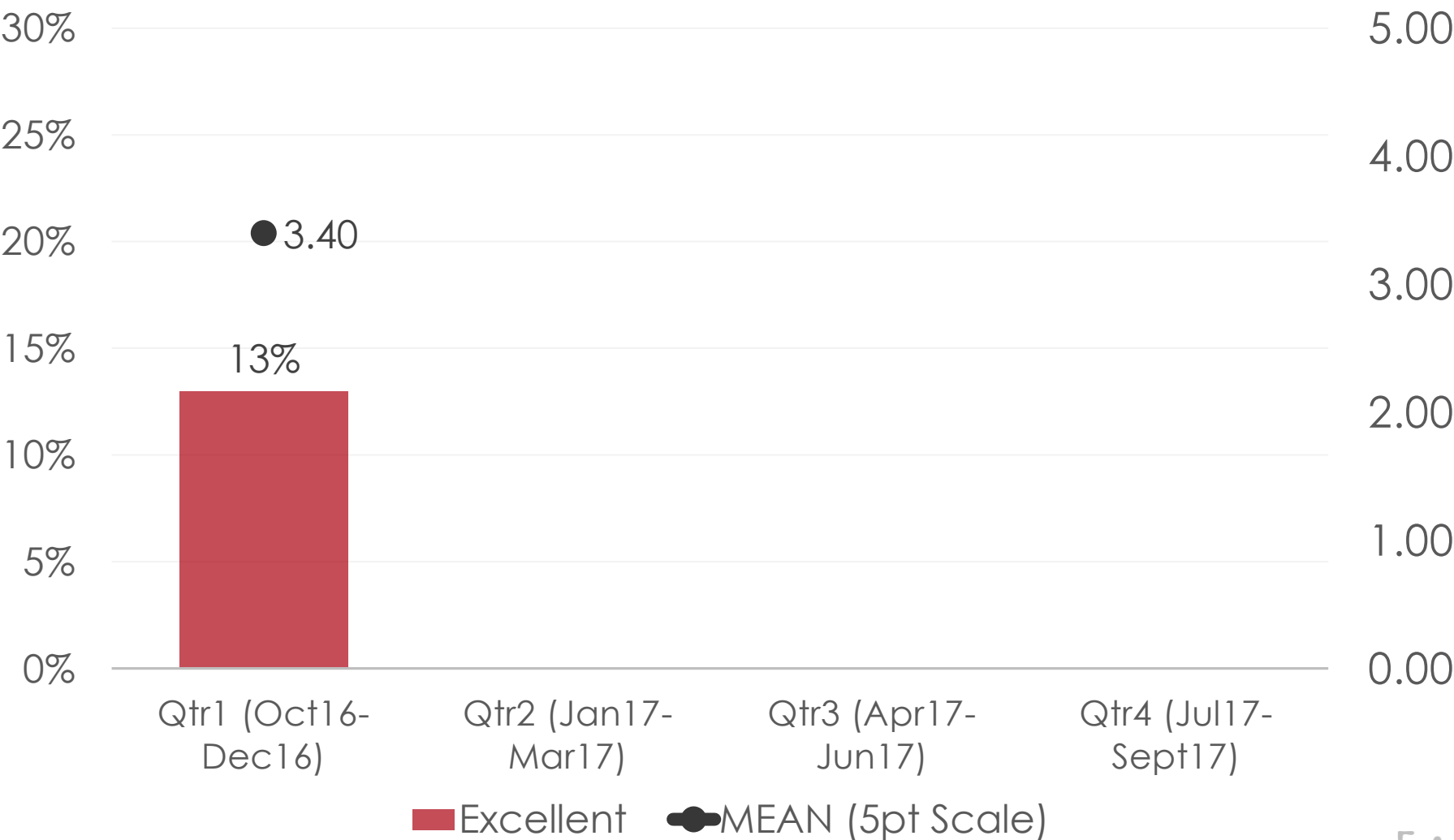
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



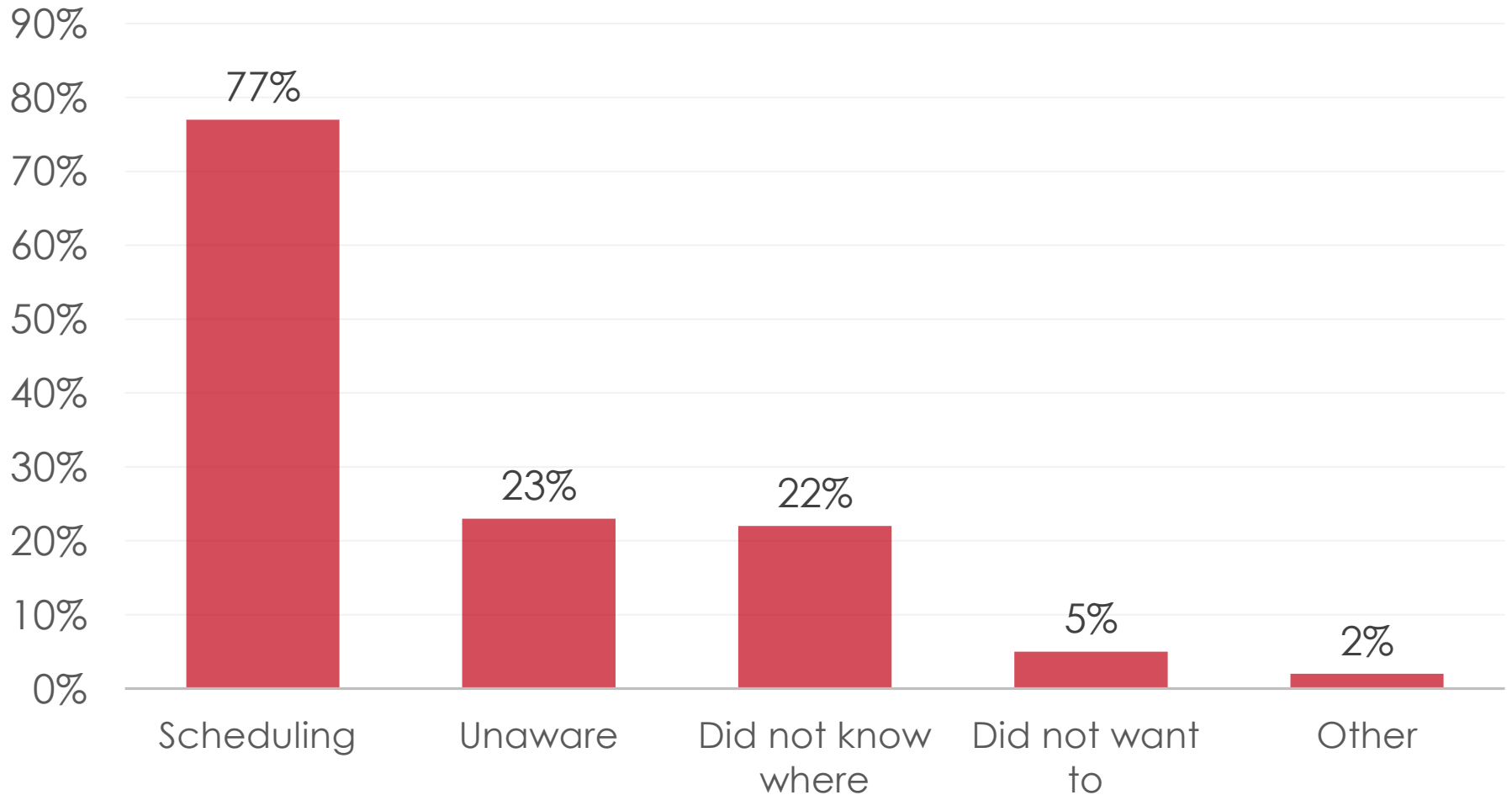
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



SATISFACTION- CULTURAL ACTIVITY/EVENTS



OBSTACLES- CULTURAL ACTIVITY/EVENTS



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.

Drivers- Overall Satisfaction

Drivers of Overall Satisfaction, Oct 2016-Dec 2016	
	1st Qtr. 2017
Drivers:	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	4
Variety of shopping	
Price of things on Guam	2
Quality of hotel accommodations	
Quality/cleanliness of air, sky	1
Quality/cleanliness of parks	3
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	72.8%

Drivers of Overall Satisfaction

- **Overall satisfaction** with Filipino visitor's experience on Guam is driven by four significant factors in the 1st Quarter 2017 Period. By rank order they are:
 - **Quality/cleanliness of air, sky,**
 - **Price of things on Guam,**
 - **Quality/cleanliness of parks, and**
 - **Quality of shopping.**
- With all four factors the overall r^2 is .728 meaning that **72.8% of overall satisfaction is accounted for by these factors.**

Drivers – On-Isle Expenditures

Drivers of Per Person On Island Expenditures, Oct 2016-Dec 2016	
Drivers:	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	1
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	8.8%
NOTE: Only significant drivers are included.	

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Filipino visitors on Guam is driven by one significant factor in the 1st Quarter 2017 period. It is:
 - **Variety of night time tours.**
- With this factor the overall r^2 is .088 meaning that **8.8% of per person on island expenditure is accounted for by this factor.**