

Guam Visitors Bureau

Philippine Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

QTR.3 (APRIL – JUNE 2017)

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 **108** 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 **108** 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.

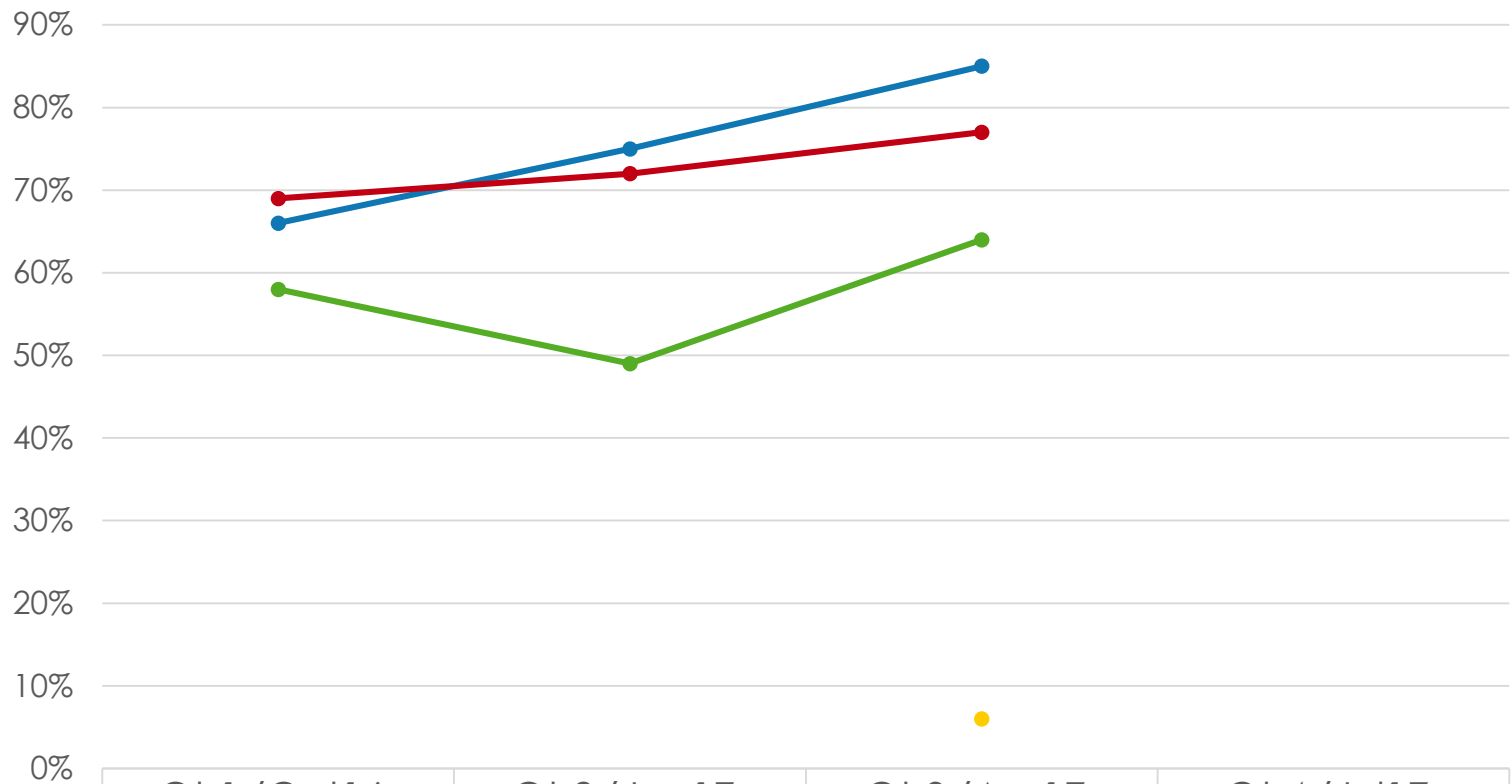
Objectives

- 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

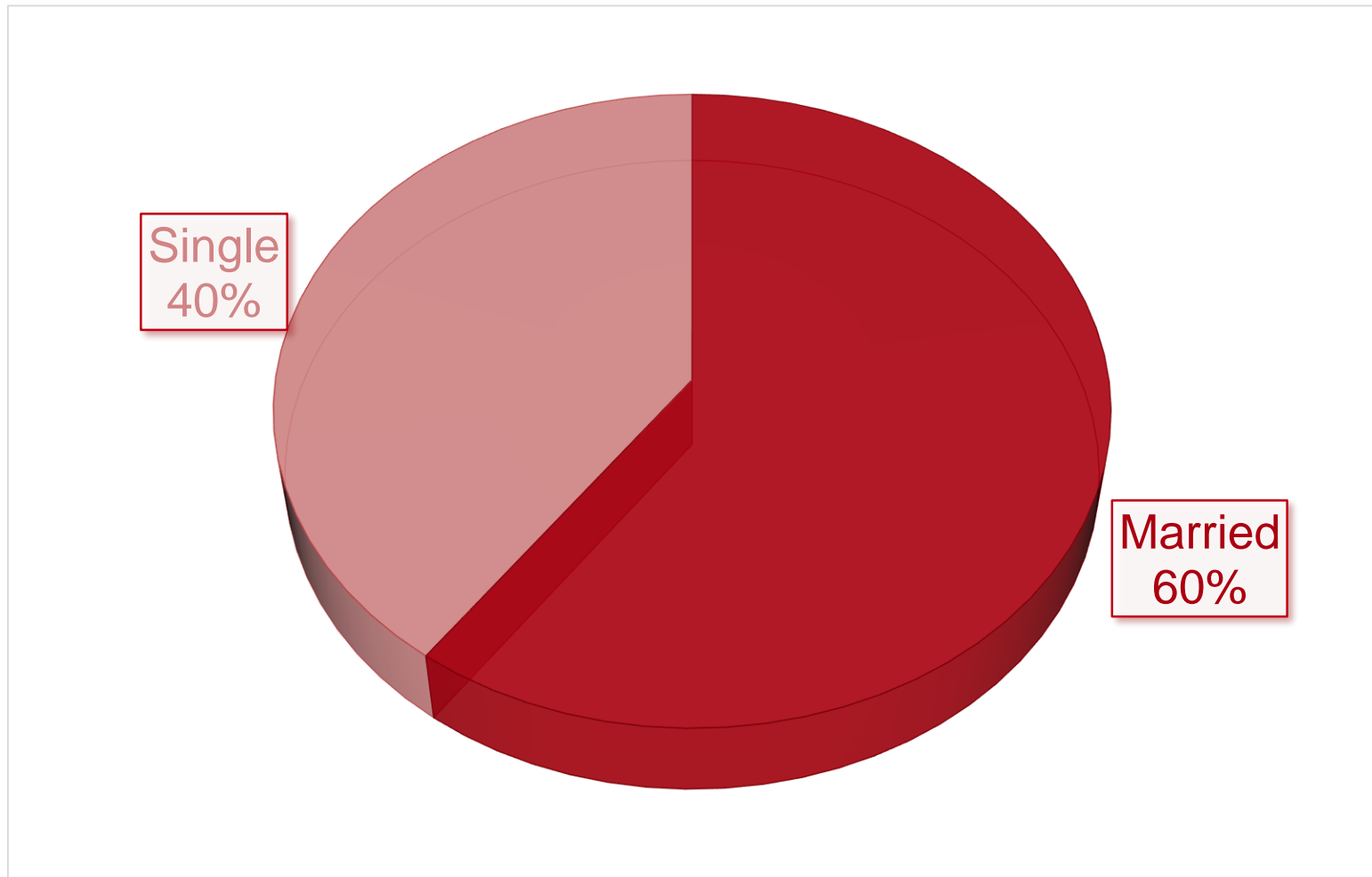


	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
—●— FITs	66%	75%	85%	
—●— Leisure Trvl	69%	72%	77%	
—●— Family	58%	49%	64%	
—●— MICE			6%	

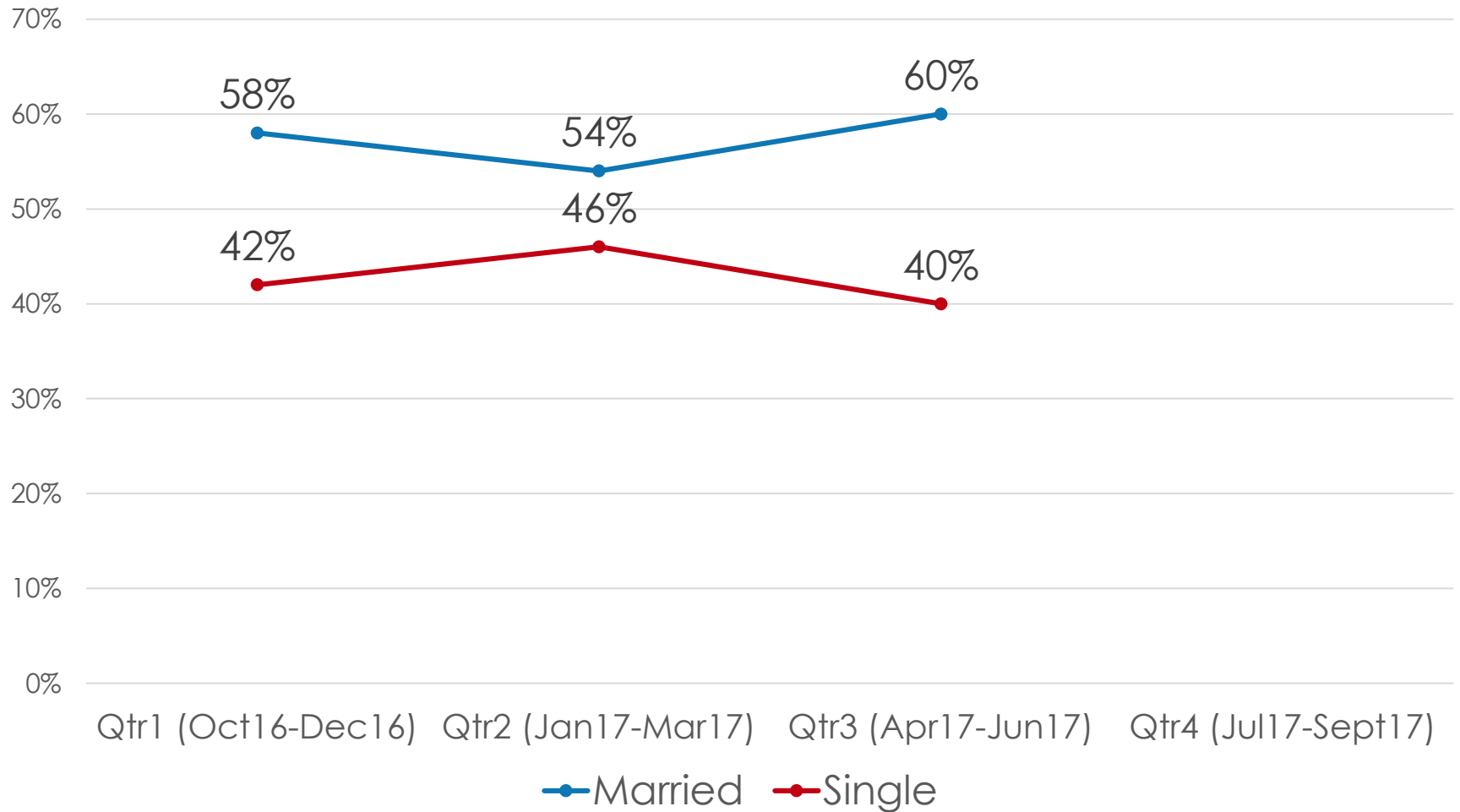
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2017 Tracking



Marital status – Key Segments

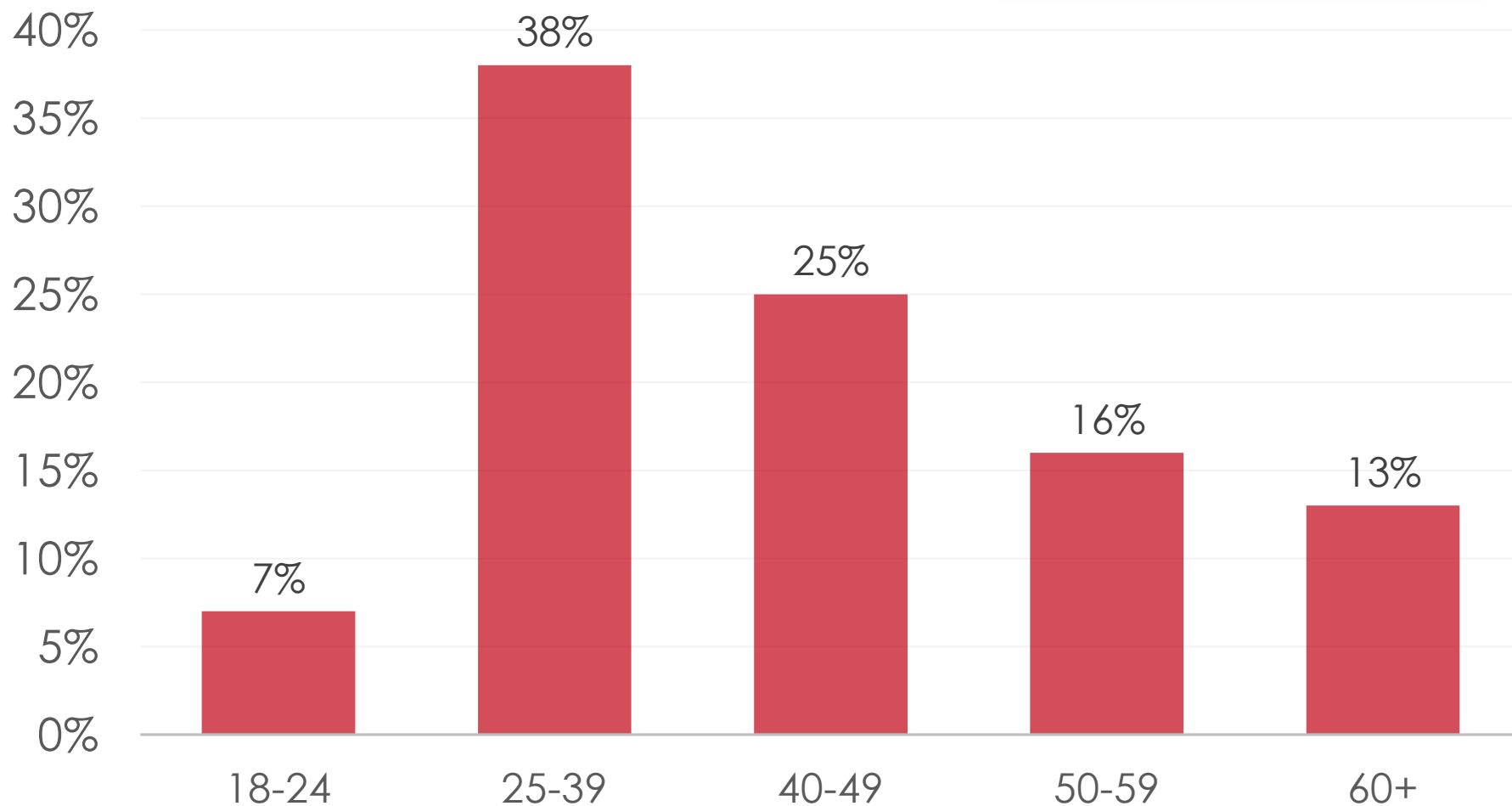
**GVB EXIT SURVEY
QE MARITAL STATUS**

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
QE	Married	60%	83%	63%	60%	77%
	Single	40%	17%	37%	40%	23%
	Total	108	6	83	92	69

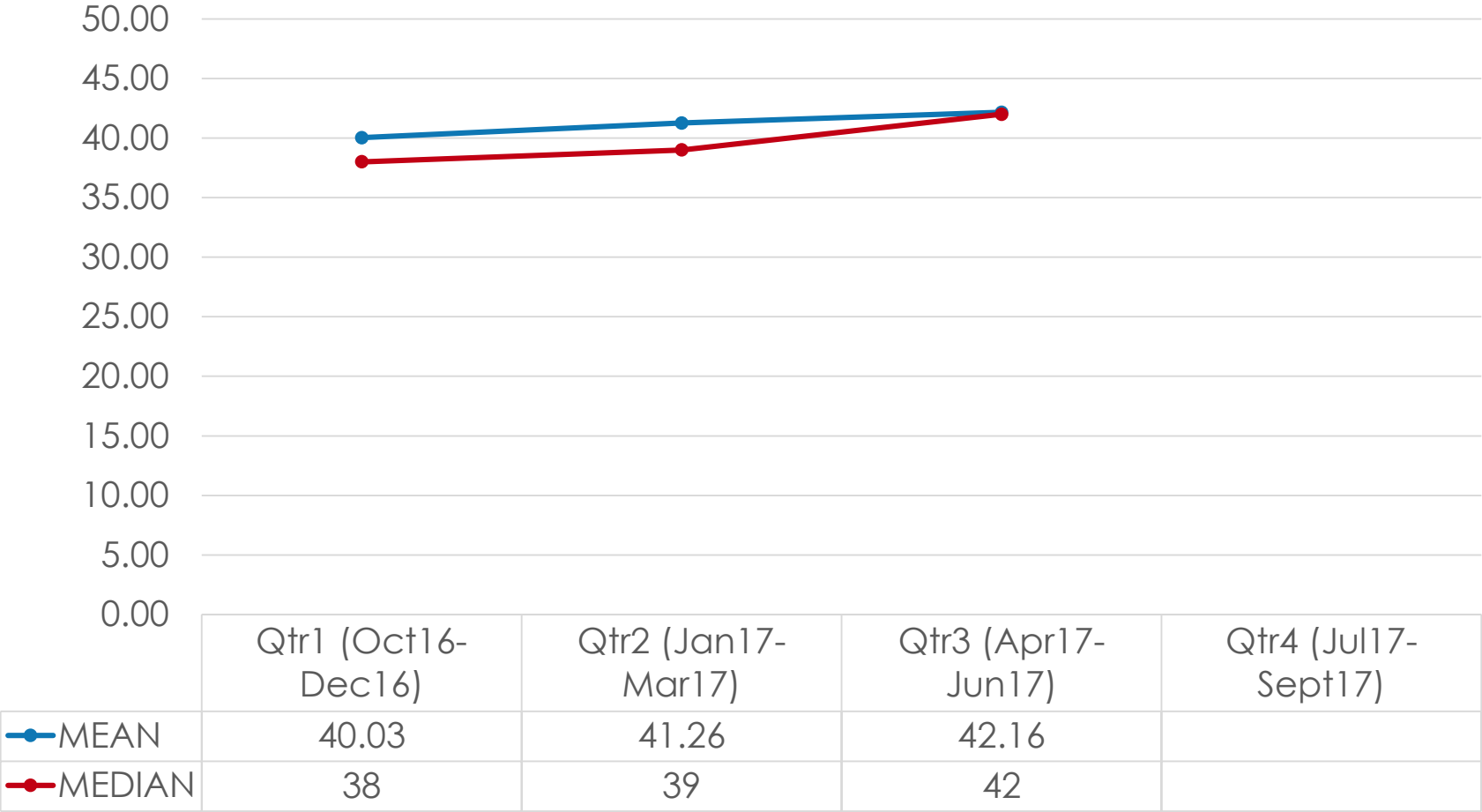
Prepared by Anthology Research

Age

MEAN = 42.16
MEDIAN = 42



Age – FY2017 Tracking



Age – Key Segments

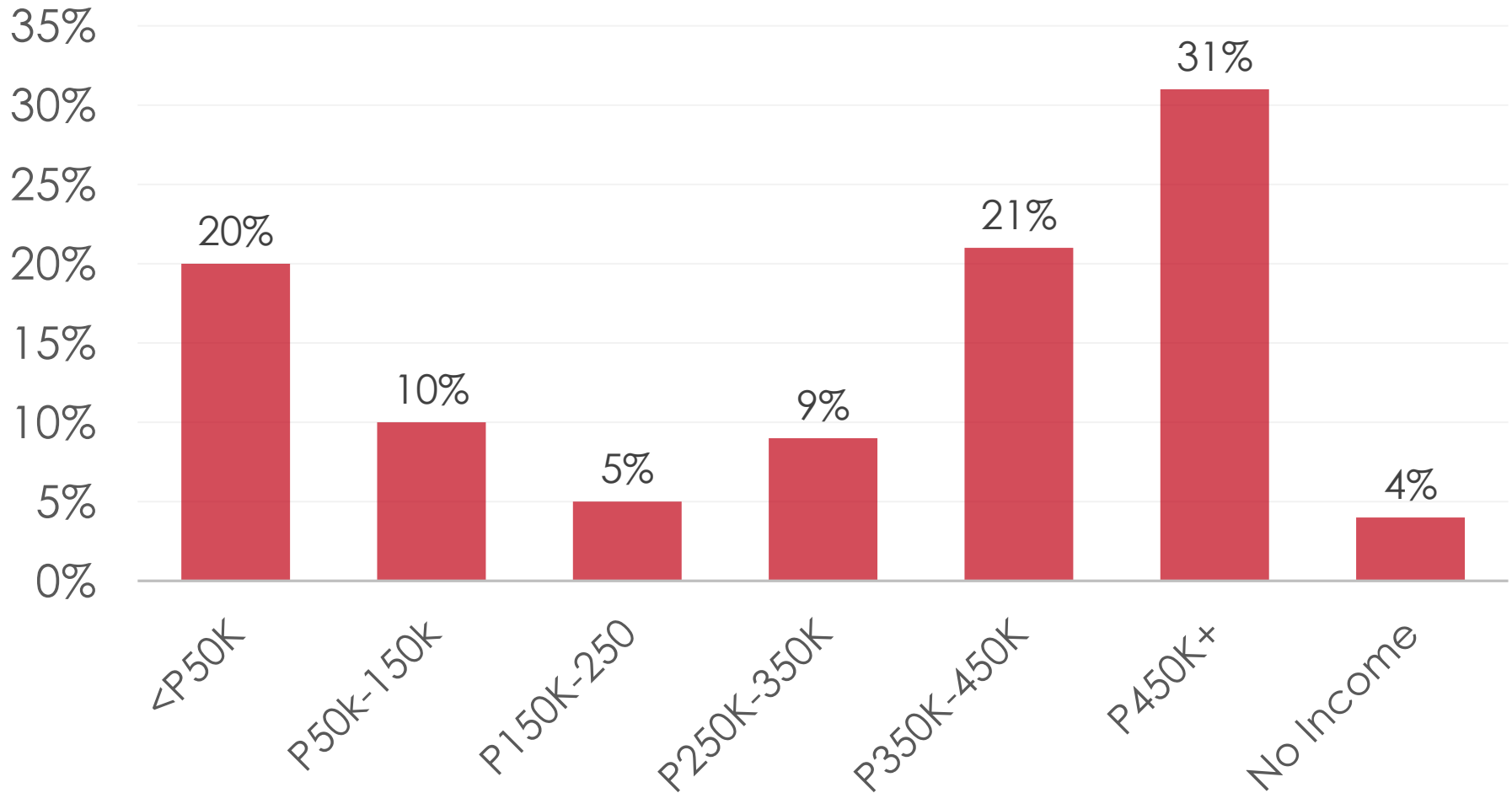
GVB EXIT SURVEY
AGE

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
SD	18-24	7%		10%	8%	9%
	25-39	38%	17%	37%	40%	35%
	40-49	25%	33%	23%	27%	30%
	50-59	16%	17%	18%	13%	14%
	60+	13%	33%	12%	12%	12%
	Total	107	6	82	91	69
SD	Mean	42.16	51.17	42.37	41.37	42.67
	Median	42	52	43	41	43

Prepared by Anthology Research

Annual Household Income

EXCHANGE RATE Peso 49.75=\$1



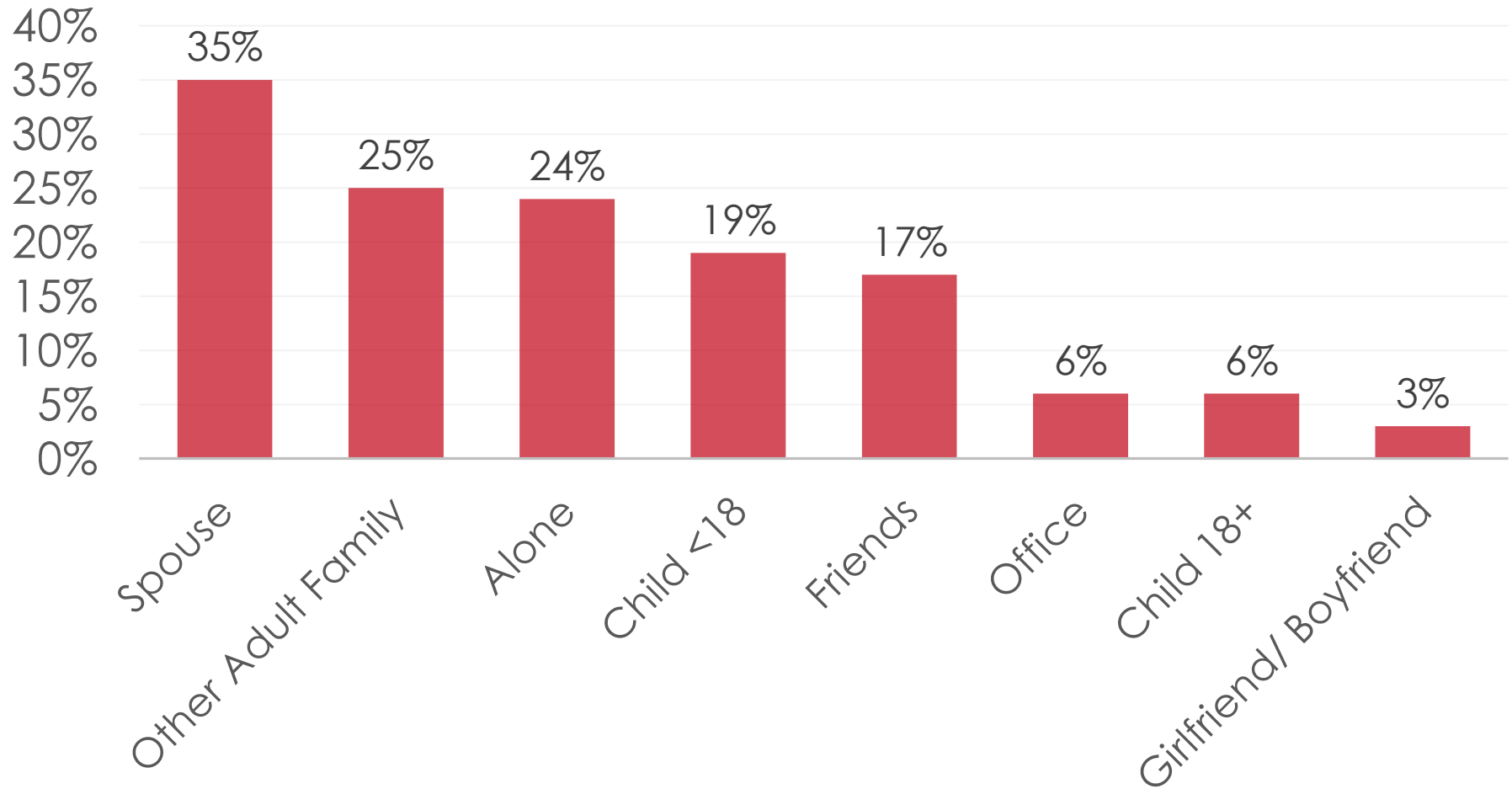
Annual Household Income – Key Segments

GVB EXIT SURVEY
Q26 Household income:

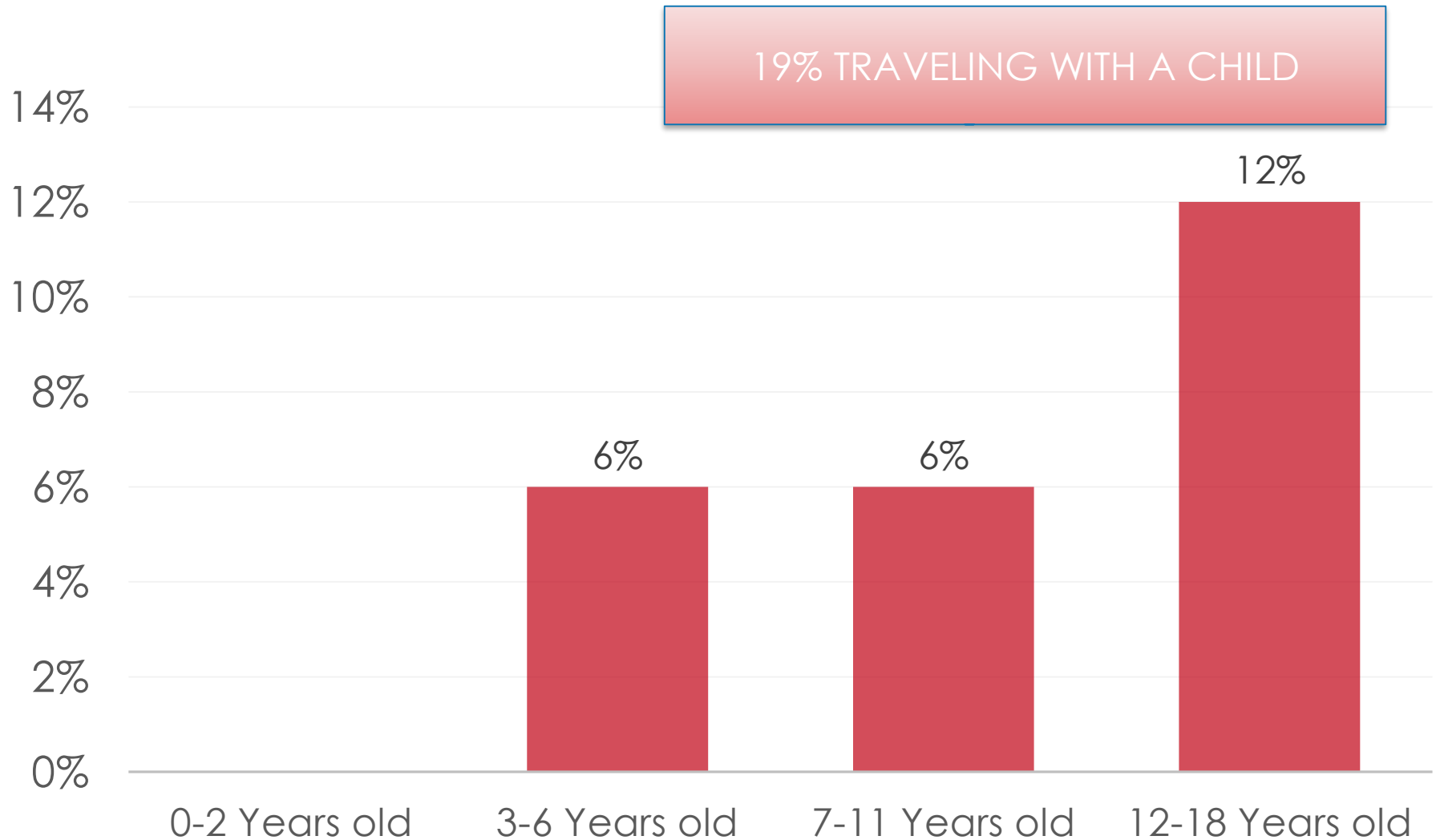
		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q26	Up to P50K	20%	17%	14%	19%	12%
	P50K-P150K	10%	33%	10%	10%	7%
	P150K-P250K	5%	17%	5%	6%	6%
	P250K-P350K	9%	17%	11%	8%	7%
	P350K-P450K	21%	17%	21%	19%	22%
	P450K+	31%		35%	35%	42%
	No Income	4%		5%	3%	3%
	Total	105	6	81	89	67

Prepared by Anthology Research

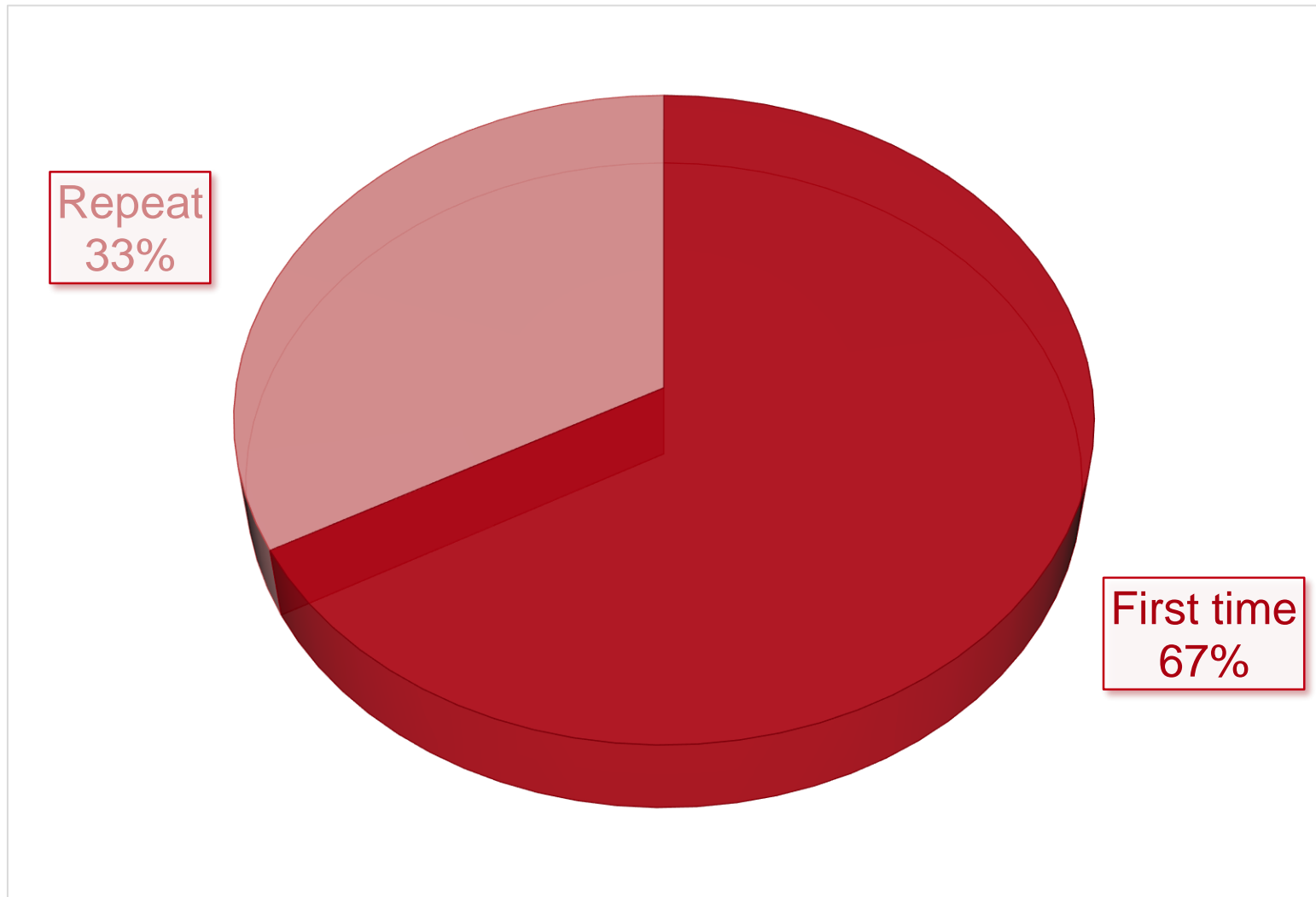
Travel Party



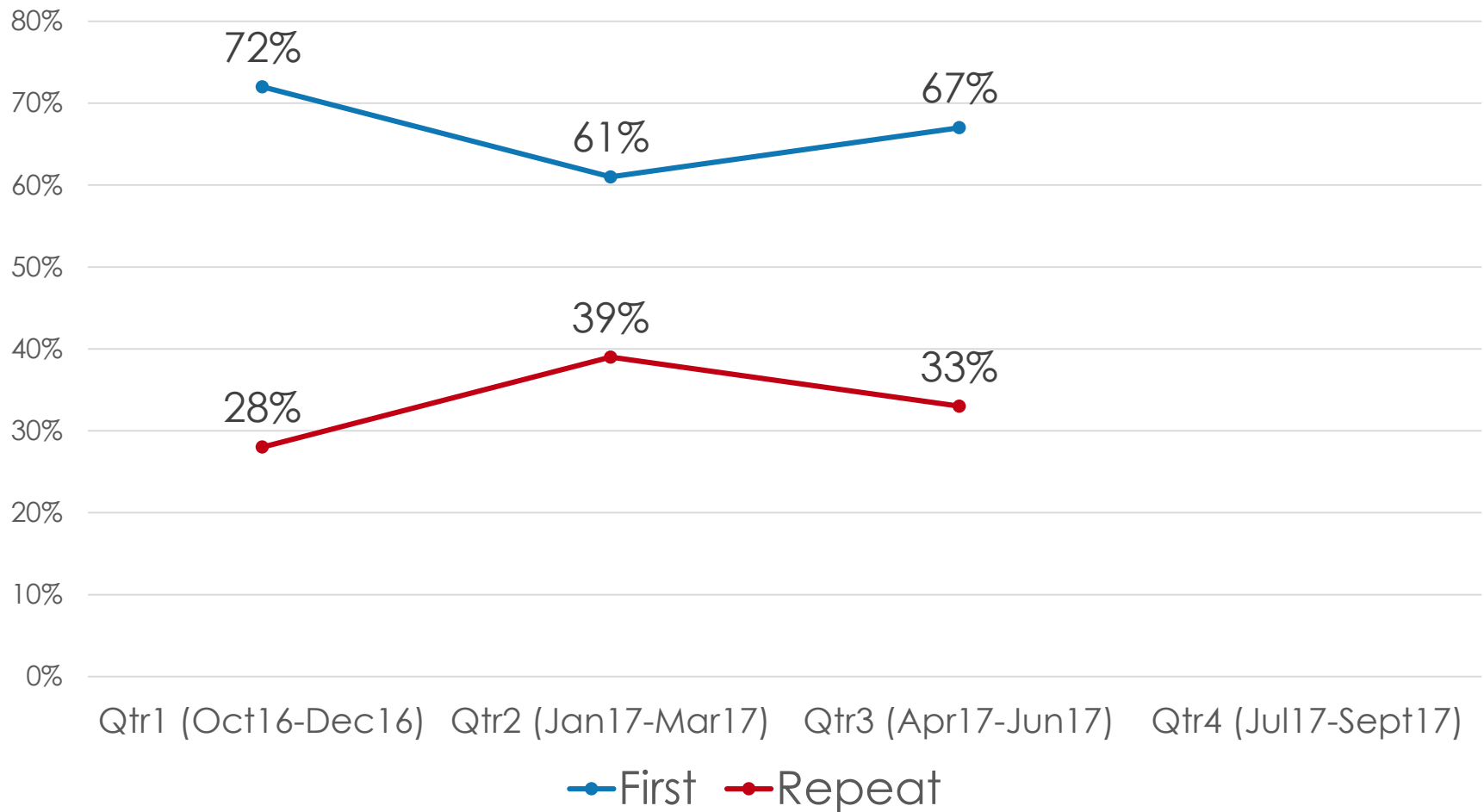
Travel Party - Children



Trips to Guam



Trips to Guam – FY2017 Tracking



Trips to Guam – Key Segments

GVB EXIT SURVEY

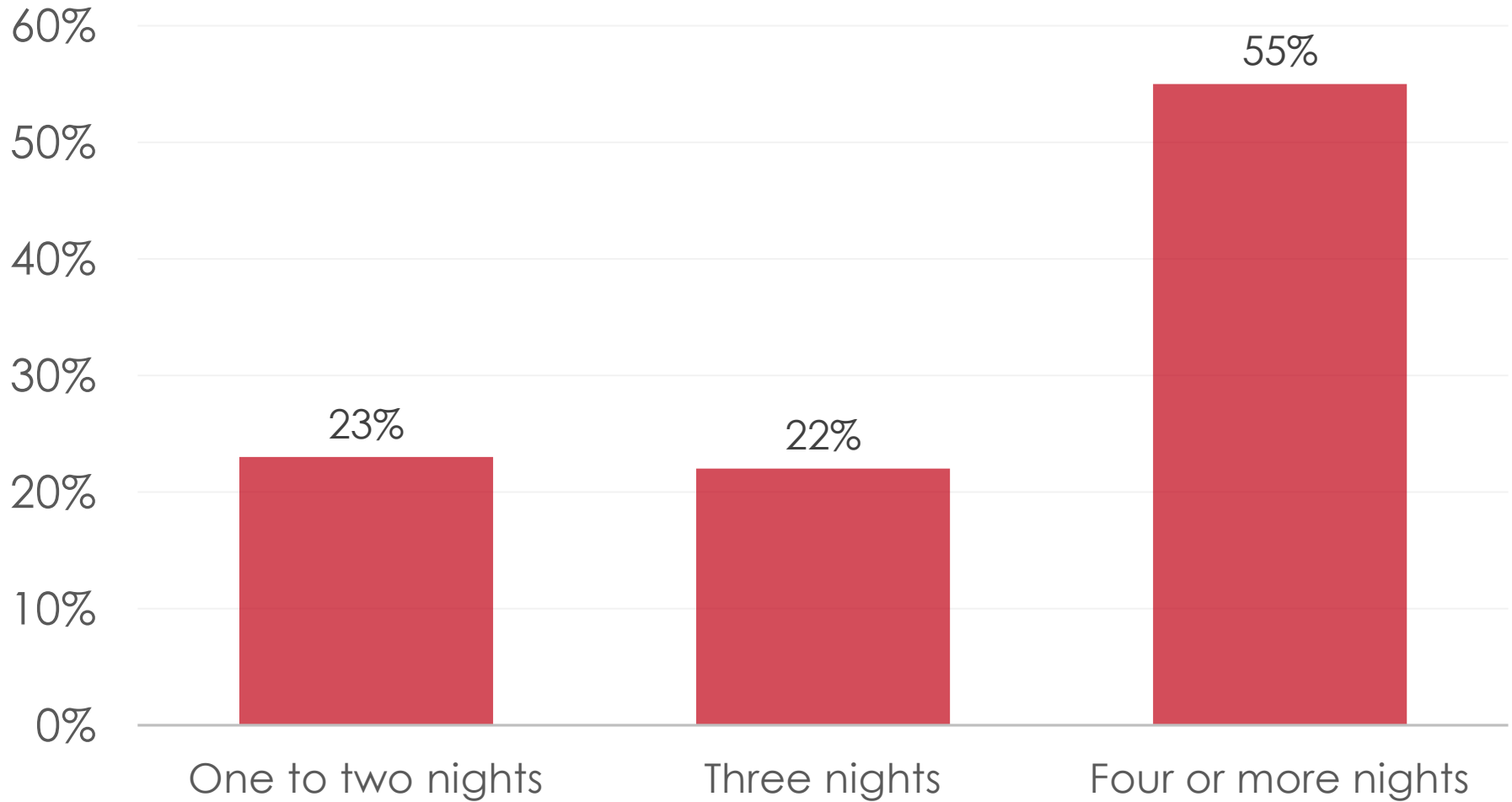
Q3 Including this trip, how many times have you visited Guam?

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q3	1st Time	67%	67%	67%	67%	67%
	Repeat	33%	33%	33%	33%	33%
	Total	106	6	81	91	67
Q3A	Mean	1.80	2.67	1.91	1.79	1.69
	Median	1	1	1	1	1

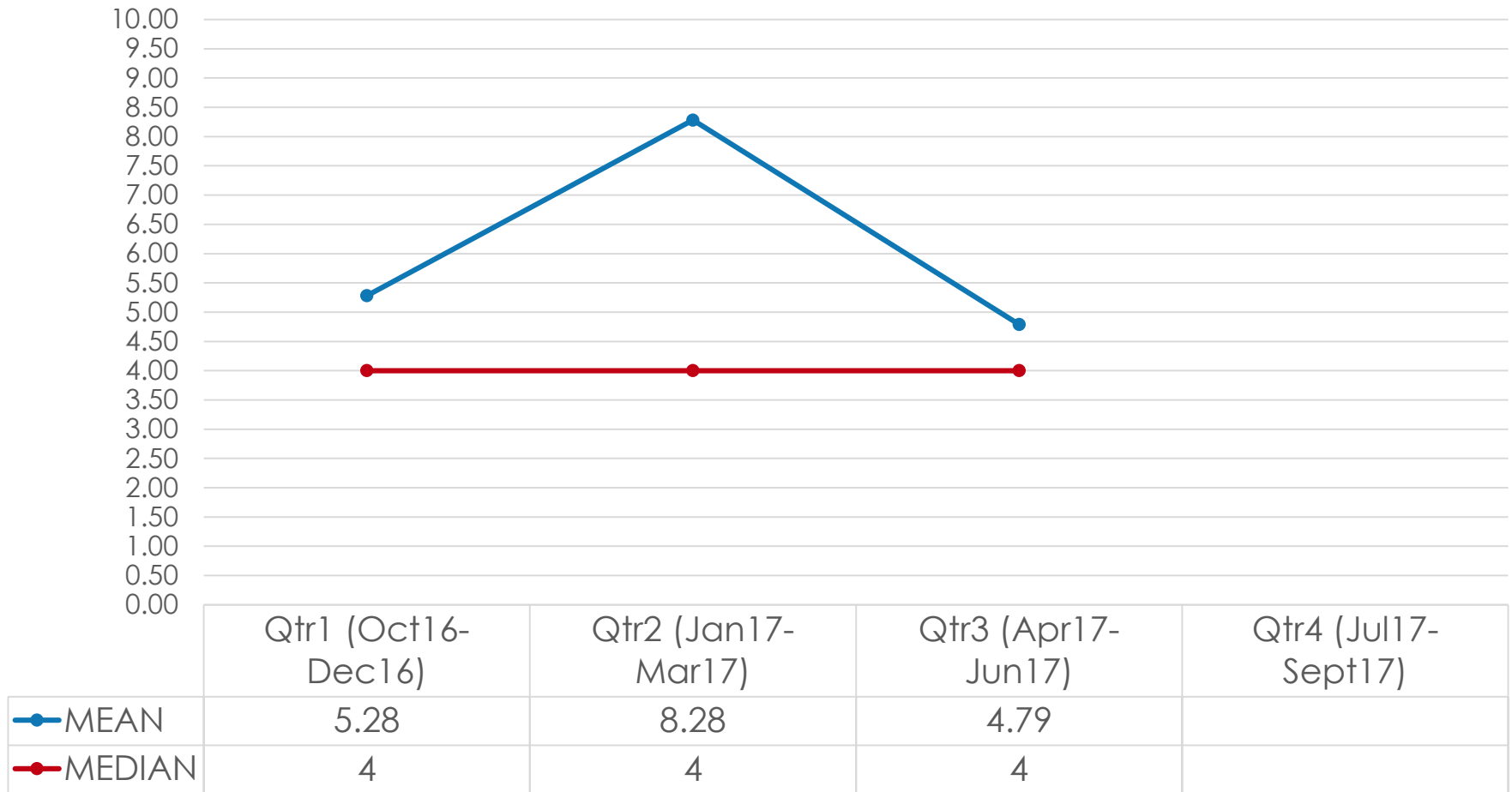
Prepared by Anthology Research

Length of Stay

MEAN NUMBER OF NIGHTS = 4.79
MEDIAN NUMBER OF NIGHTS = 4



Length of Stay – FY2017 Tracking



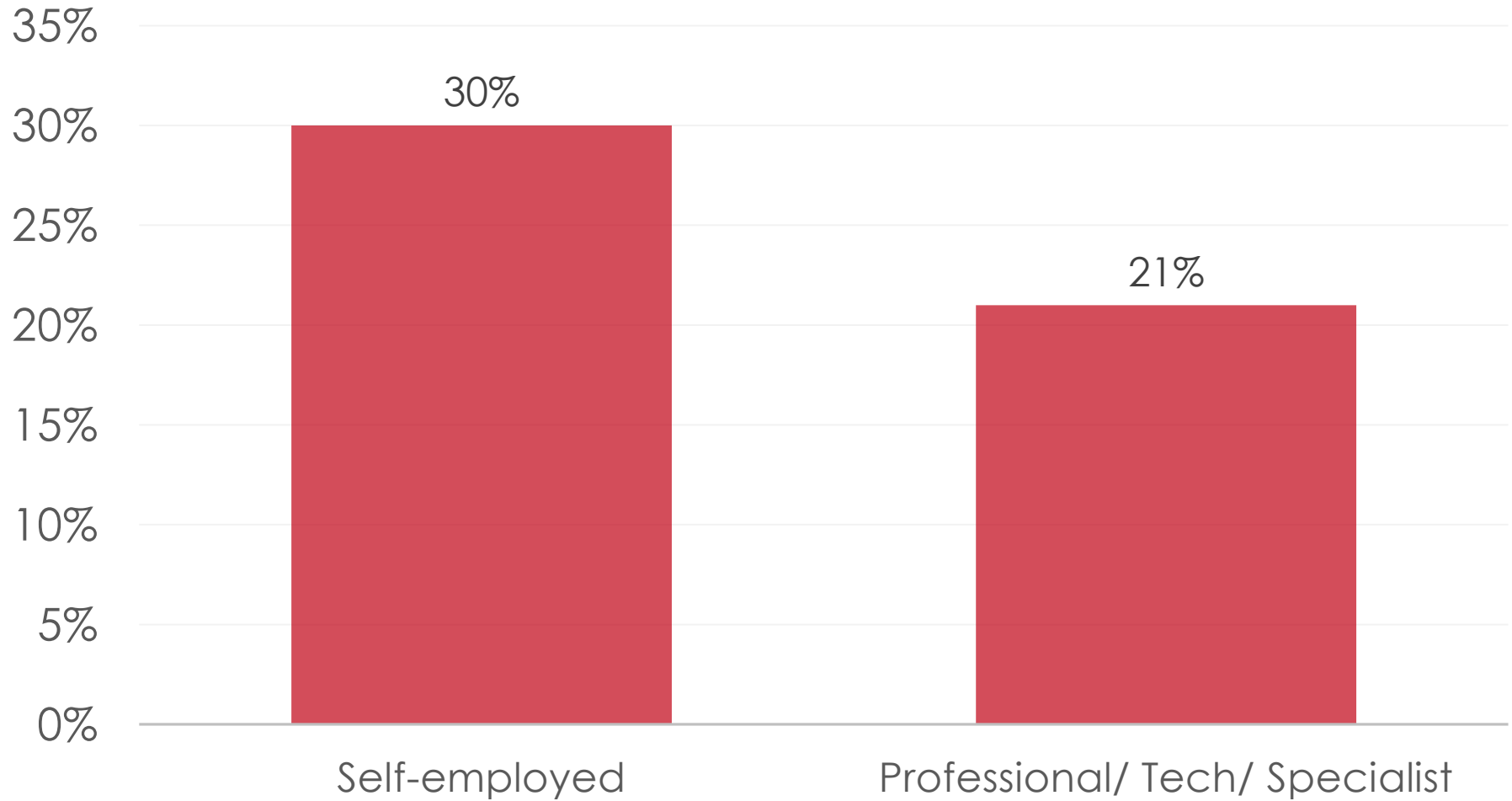
Length of Stay – Key Segments

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

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
SA	1-2	23%	50%	24%	22%	20%
	3	22%		24%	25%	30%
	4+	55%	50%	52%	53%	49%
	Total	108	6	83	92	69
SA	Mean	4.79	3.33	4.84	4.50	4.51
	Median	4	4	4	4	3

Prepared by Anthology Research

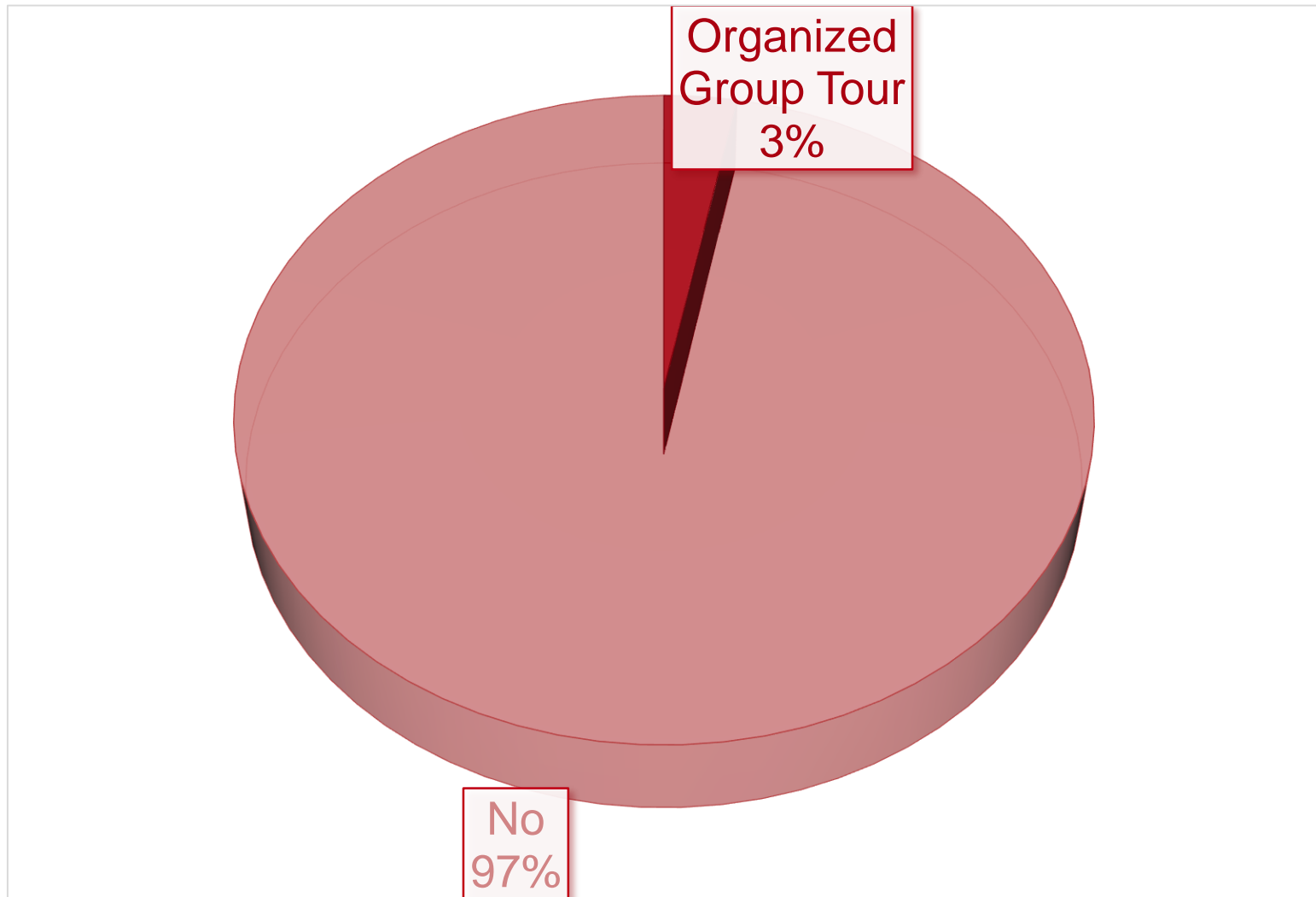
Occupation – Top Responses (10%+)



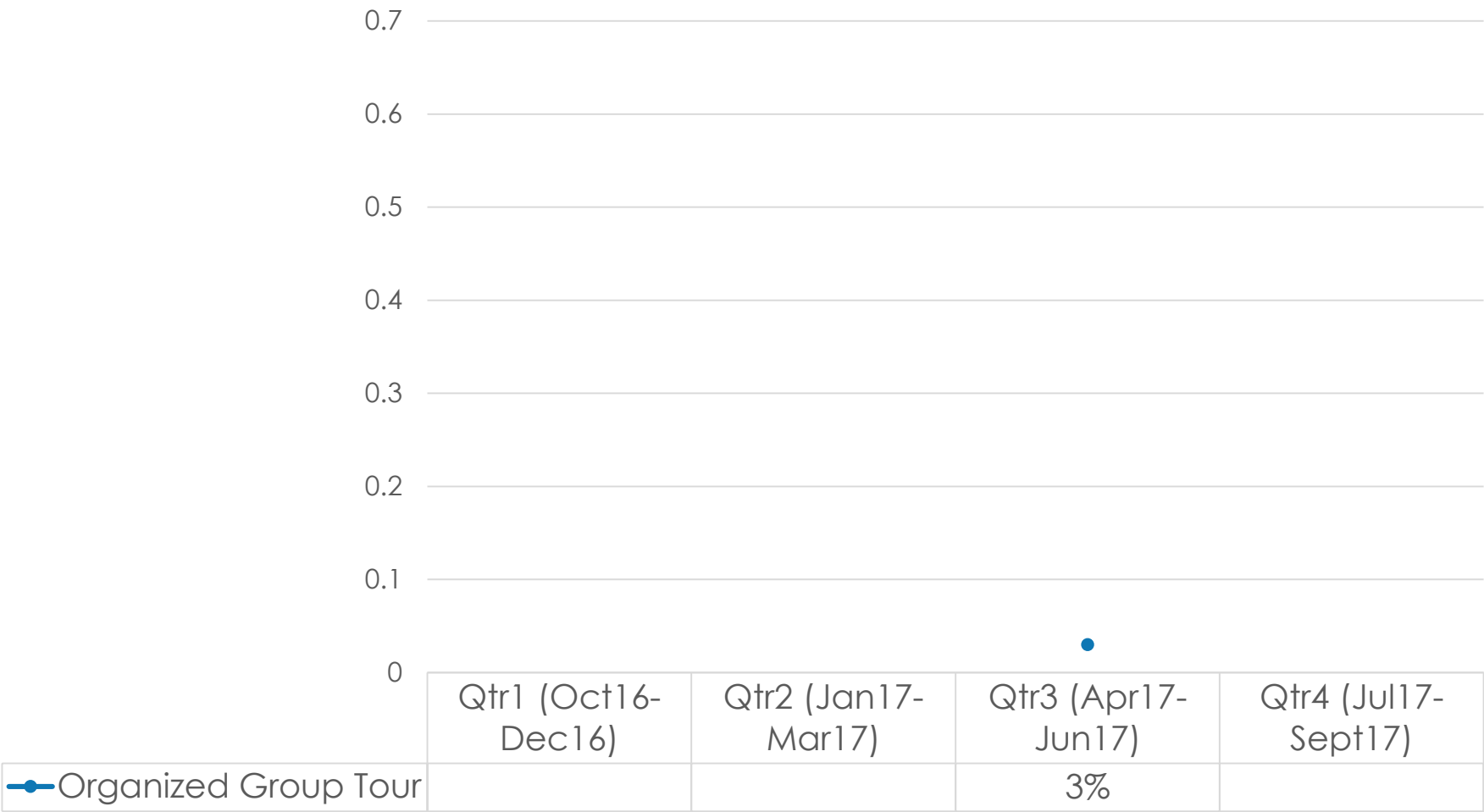
SECTION 2

TRAVEL PLANNING

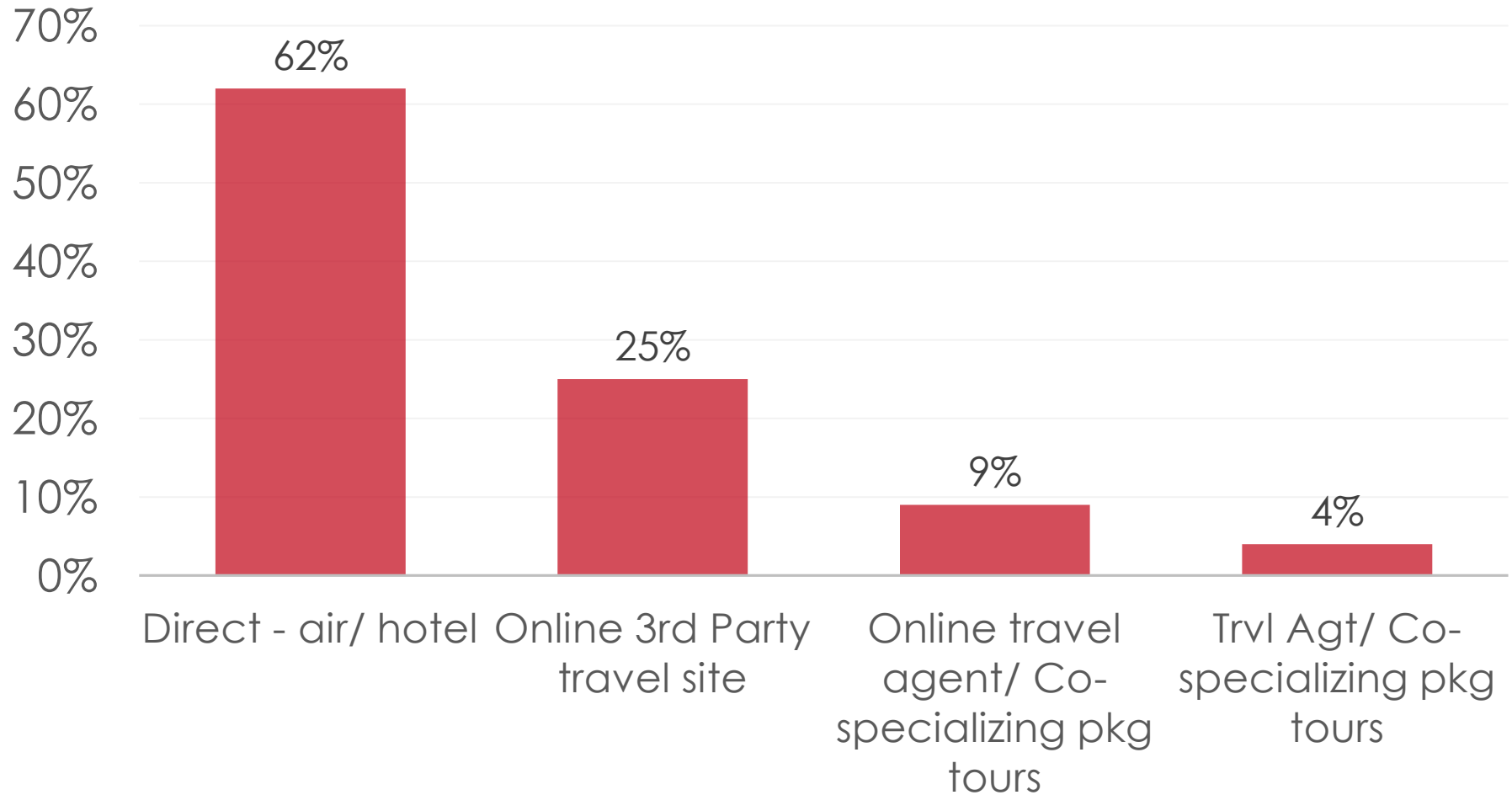
Organized Group Tour



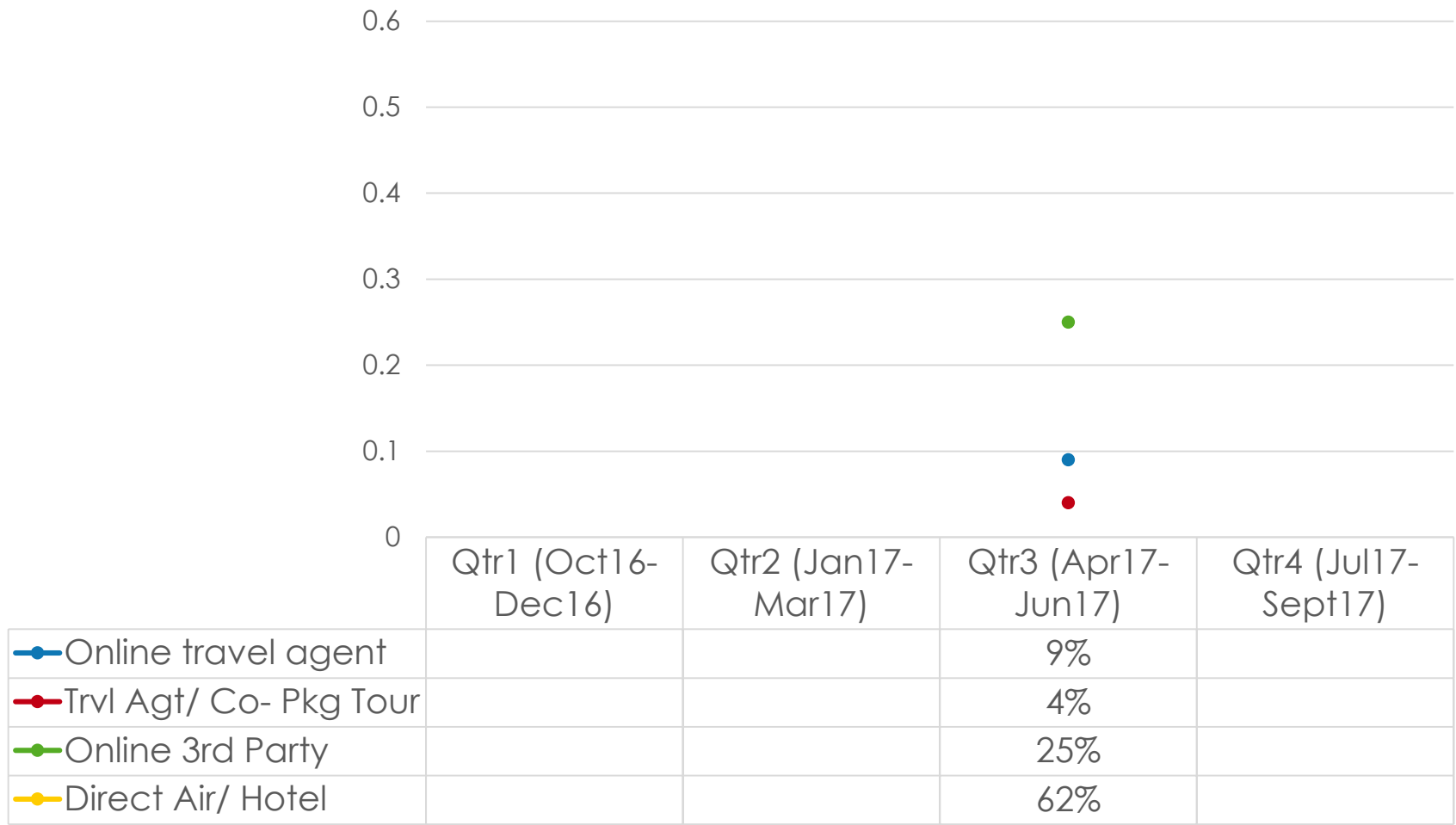
Organized Group Tour



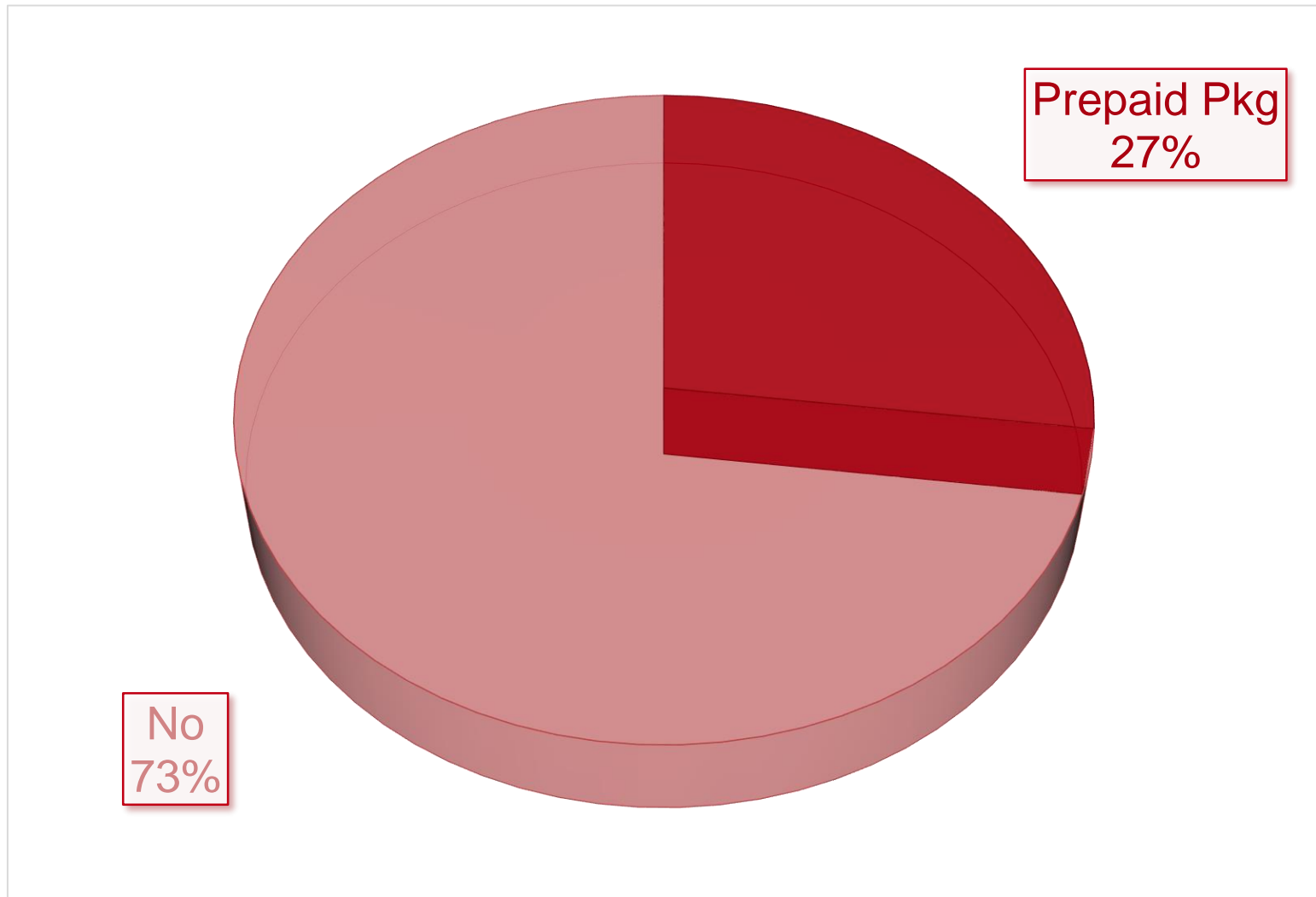
Travel Arrangements Sources



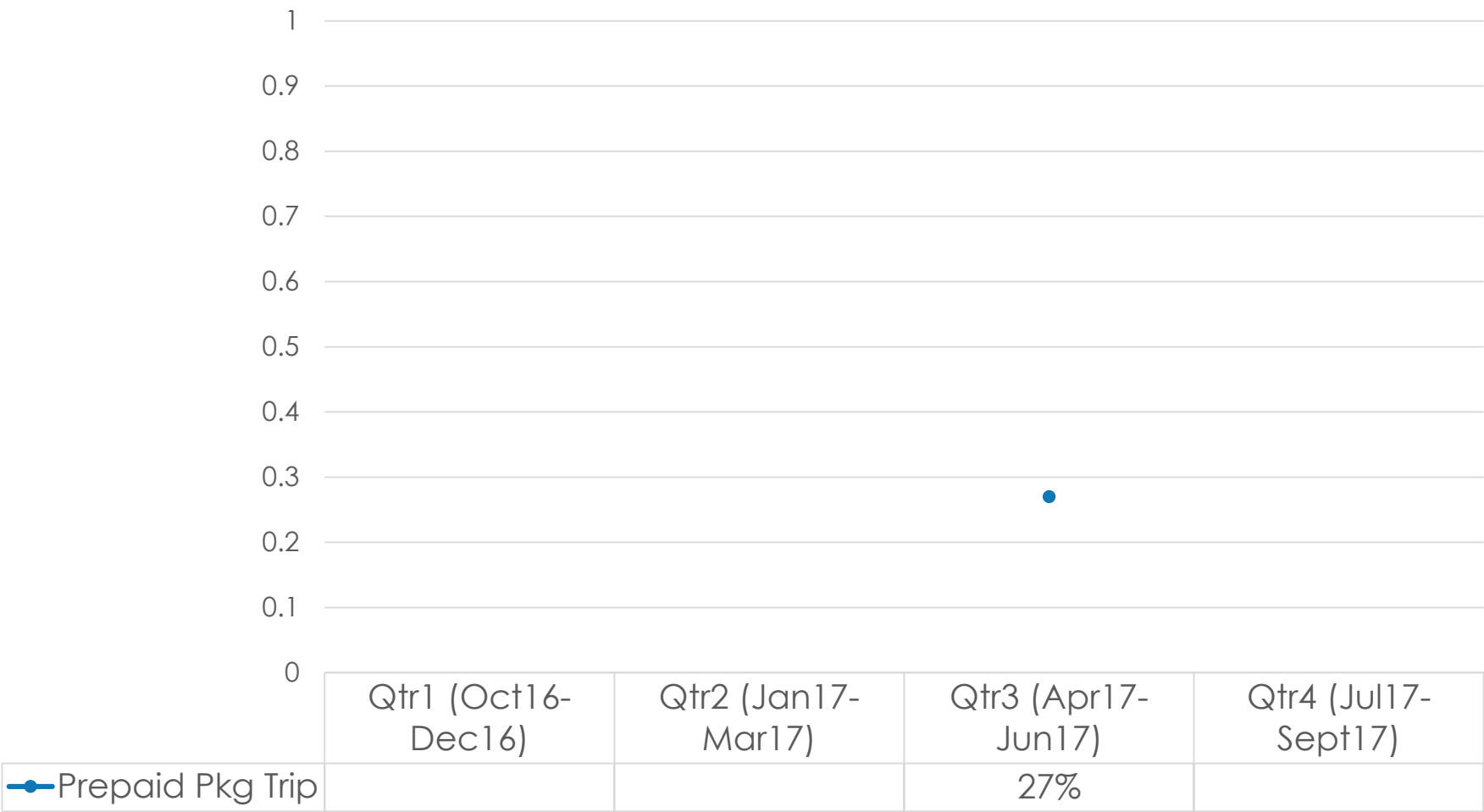
Travel Arrangements Sources



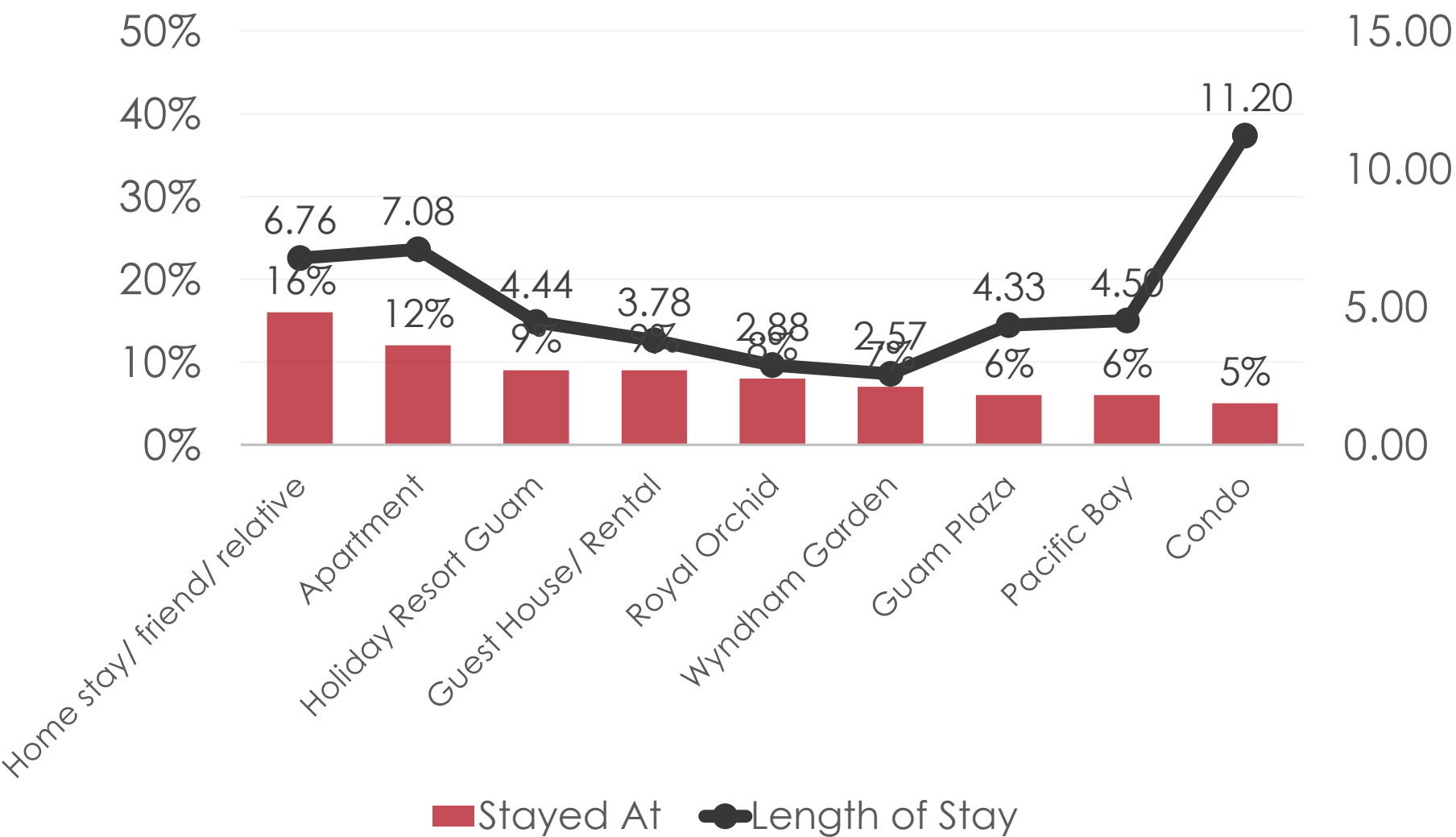
Prepaid Package Trip



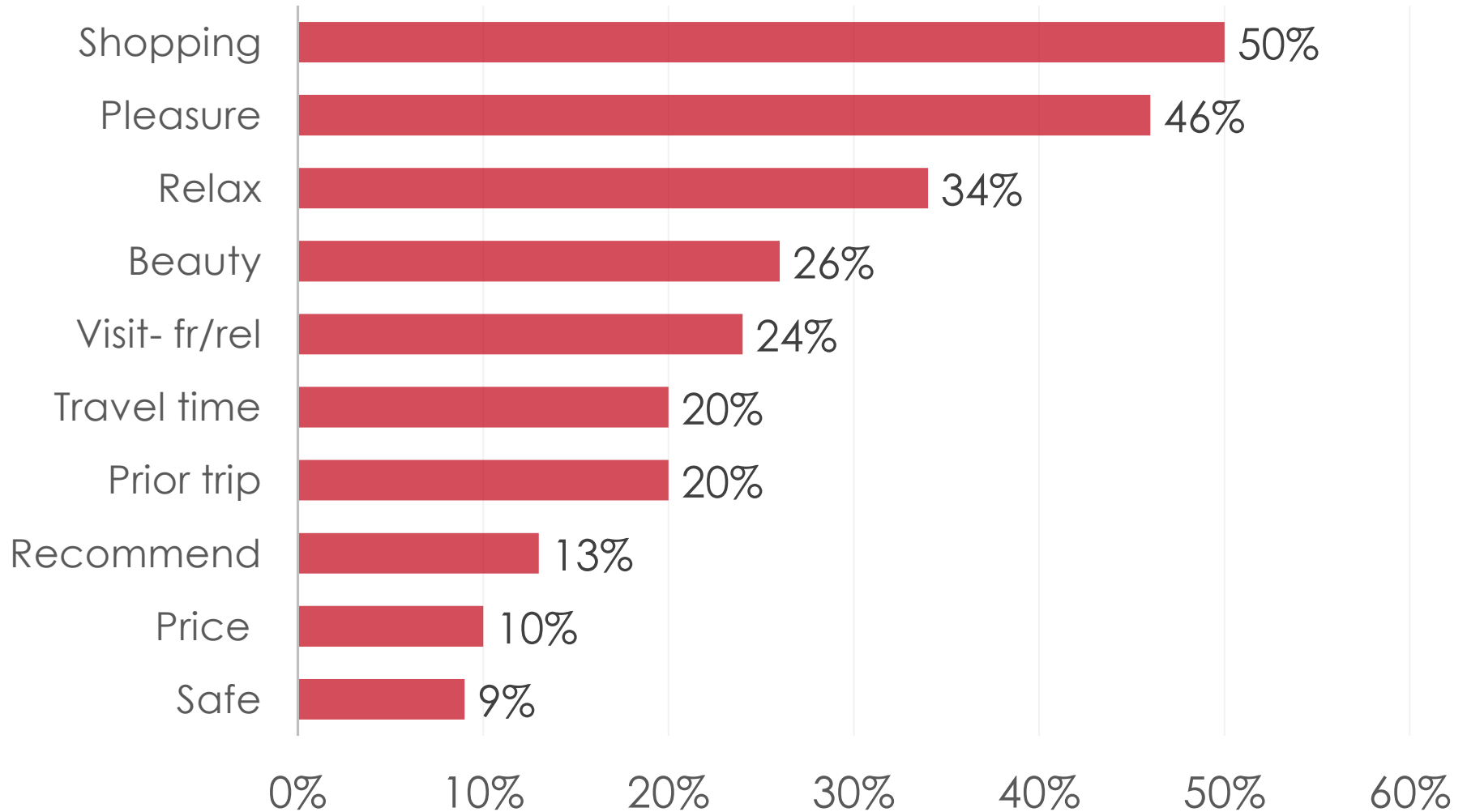
Prepaid Package Trip



Accommodations (Top Responses)



Travel Motivation (Top Responses)



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	50%	33%	52%	49%	60%
	Pleasure/ vacation	46%	17%	59%	46%	54%
	Just to relax	34%	17%	43%	38%	40%
	Beautiful seas, beaches, tropical climate	26%	17%	34%	25%	25%
	To visit friends or relatives	24%	17%	23%	21%	21%
	A previous visit	20%		19%	20%	18%
	Short travel time (not too far from home)	20%	17%	19%	21%	19%
	Recommendation of friend/ relative/ travel agency	13%	17%	7%	13%	12%
	Price of the tour package	10%	17%	7%	10%	7%
	It is a safe place to spend a vacation	9%		8%	8%	9%
	Adventure	7%	17%	6%	8%	1%
	Career certification/ testing	6%		2%	5%	
	Convention/ conference/ trade show/ meeting	4%	67%	1%	3%	
	Company/ business trip	3%	17%	1%	3%	
	To Get Married/ attend Wedding	2%		1%	2%	
	Incentive trip	2%	33%	2%	2%	1%
	Water sports (snorkeling, windsurfing, parasailing)	1%			1%	1%
	To golf	1%				1%
	Honeymoon	1%		1%		1%
	Organized sporting activity/ event	1%	17%		1%	
	School trip	1%		1%	1%	
	Total	107	6	83	92	68

SECTION 3

EXPENDITURES

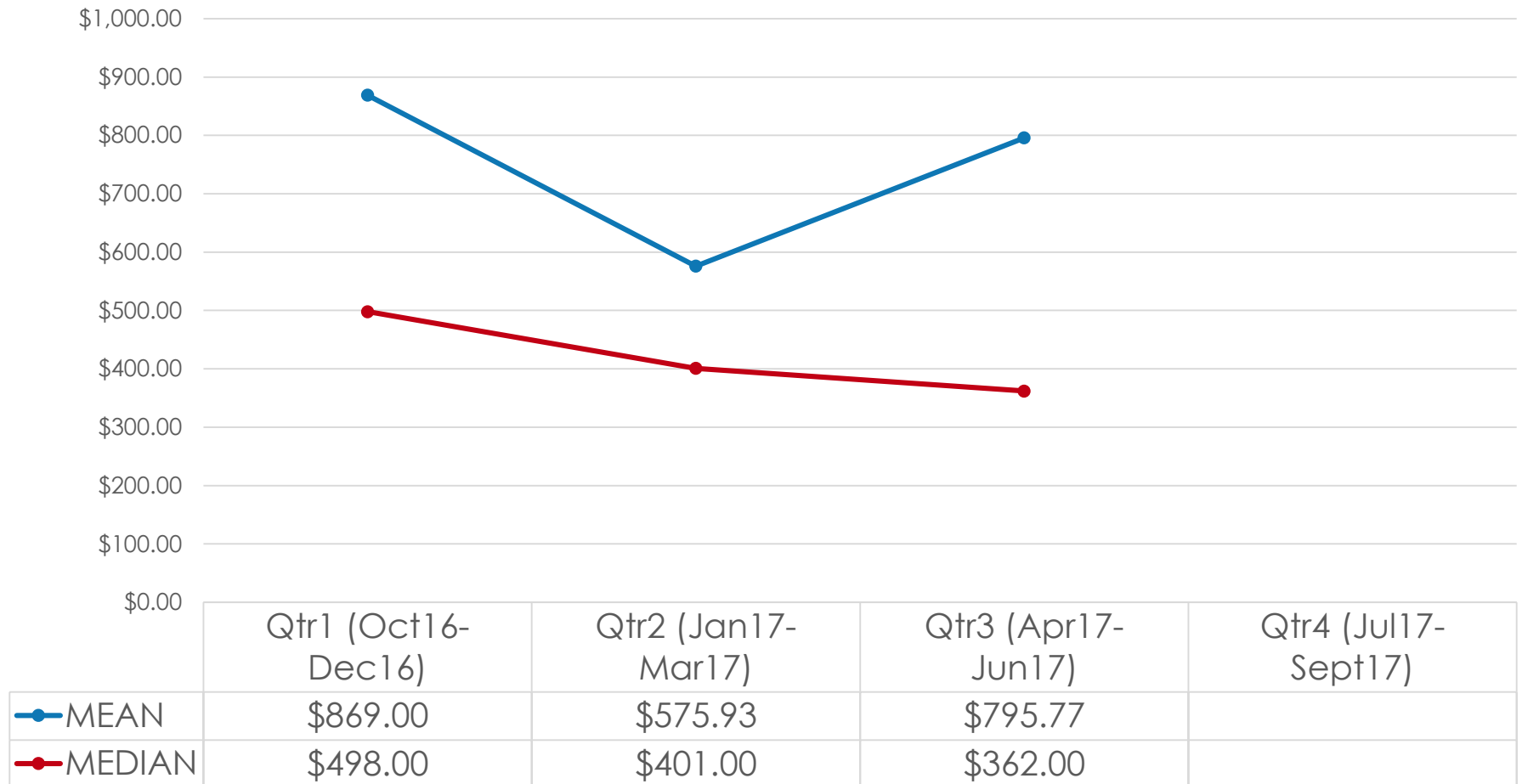
Prepaid Expenditures

EXCHANGE RATE Peso 49.75=\$1

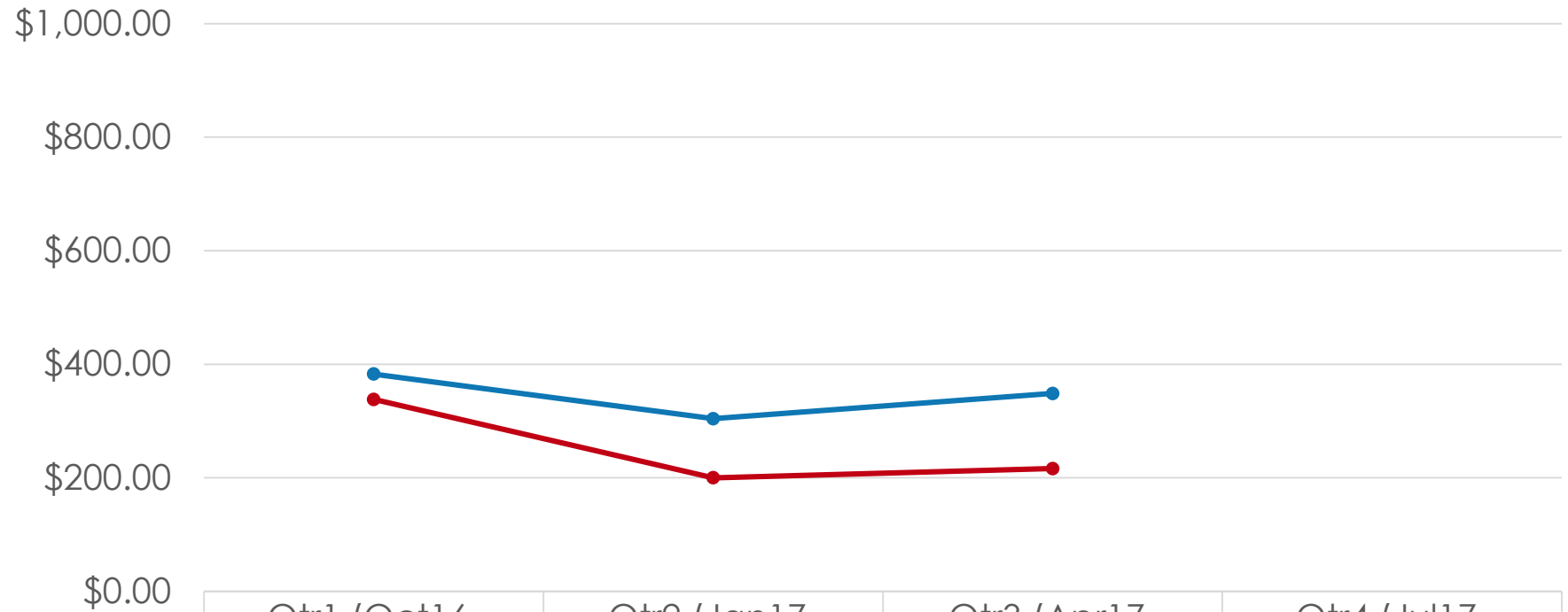
- \$795.77 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$348.52 = overall mean average per person prepaid expenditures

Prepaid Entire Travel Party – FY2017

Tracking



Prepaid Per Person– FY2017 Tracking



	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	\$382.77	\$303.96	\$348.52	
MEDIAN	\$338.00	\$200.00	\$216.00	

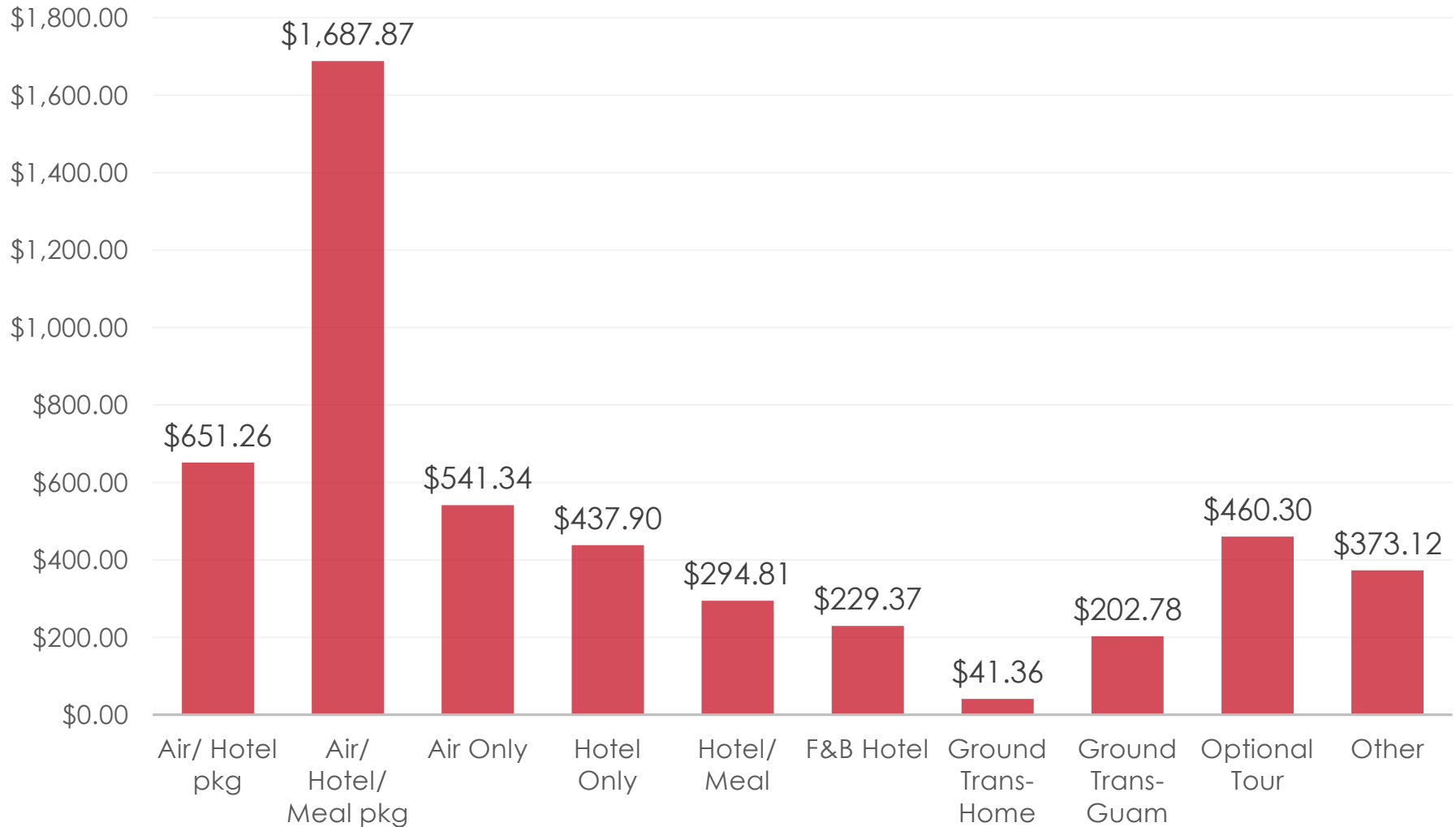
Prepaid Per Person– Key Segments

**GVB EXIT SURVEY
Q10A PREPAID - PER PERSON:**

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
PREPAID PP	Mean	\$348.52	\$598.86	\$343.91	\$363.33	\$335.35
	Median	\$216	\$492	\$231	\$241	\$186

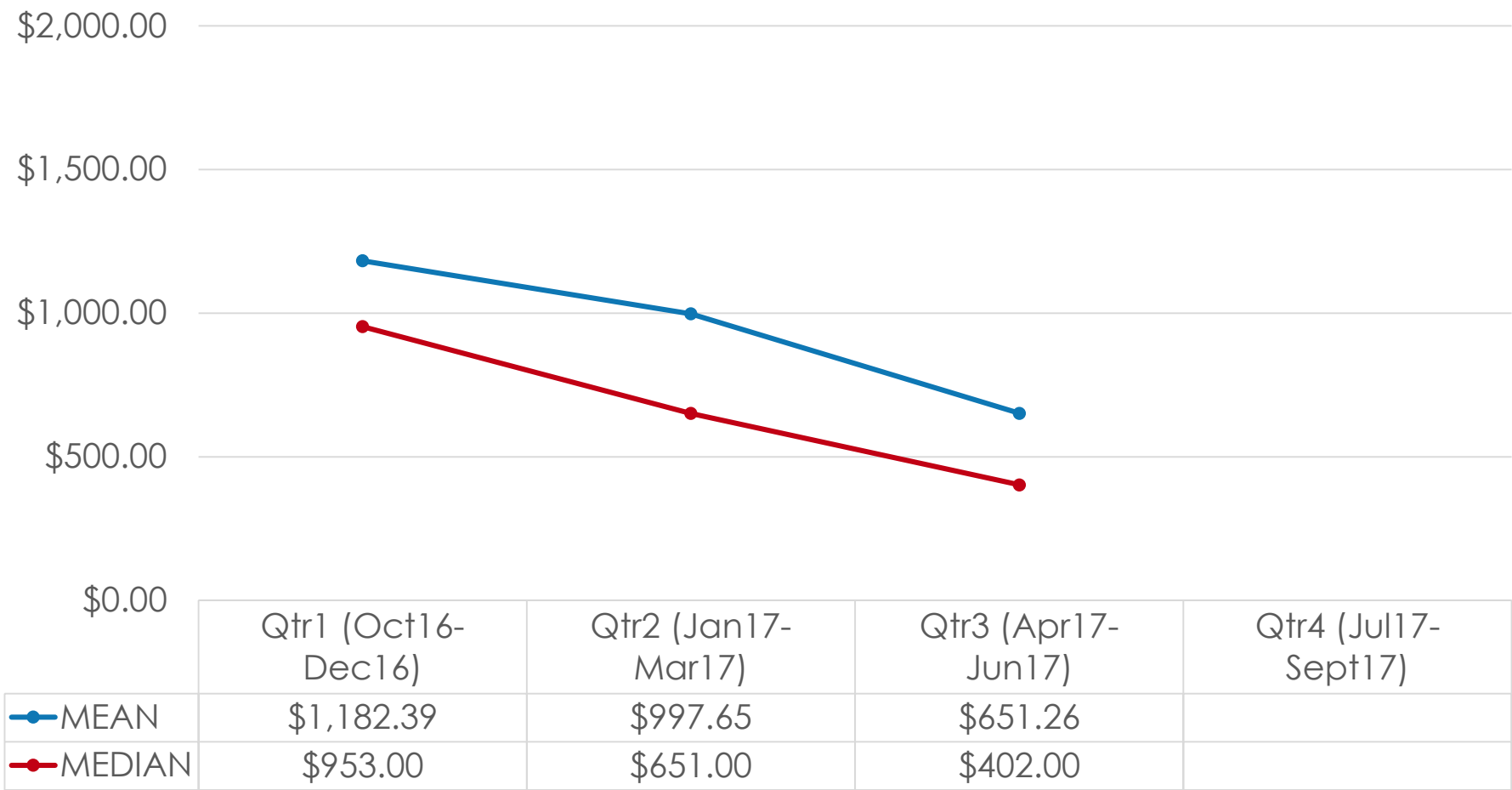
Prepared by Anthology Research

Prepaid Expenses by Category – MEAN Entire Travel Party



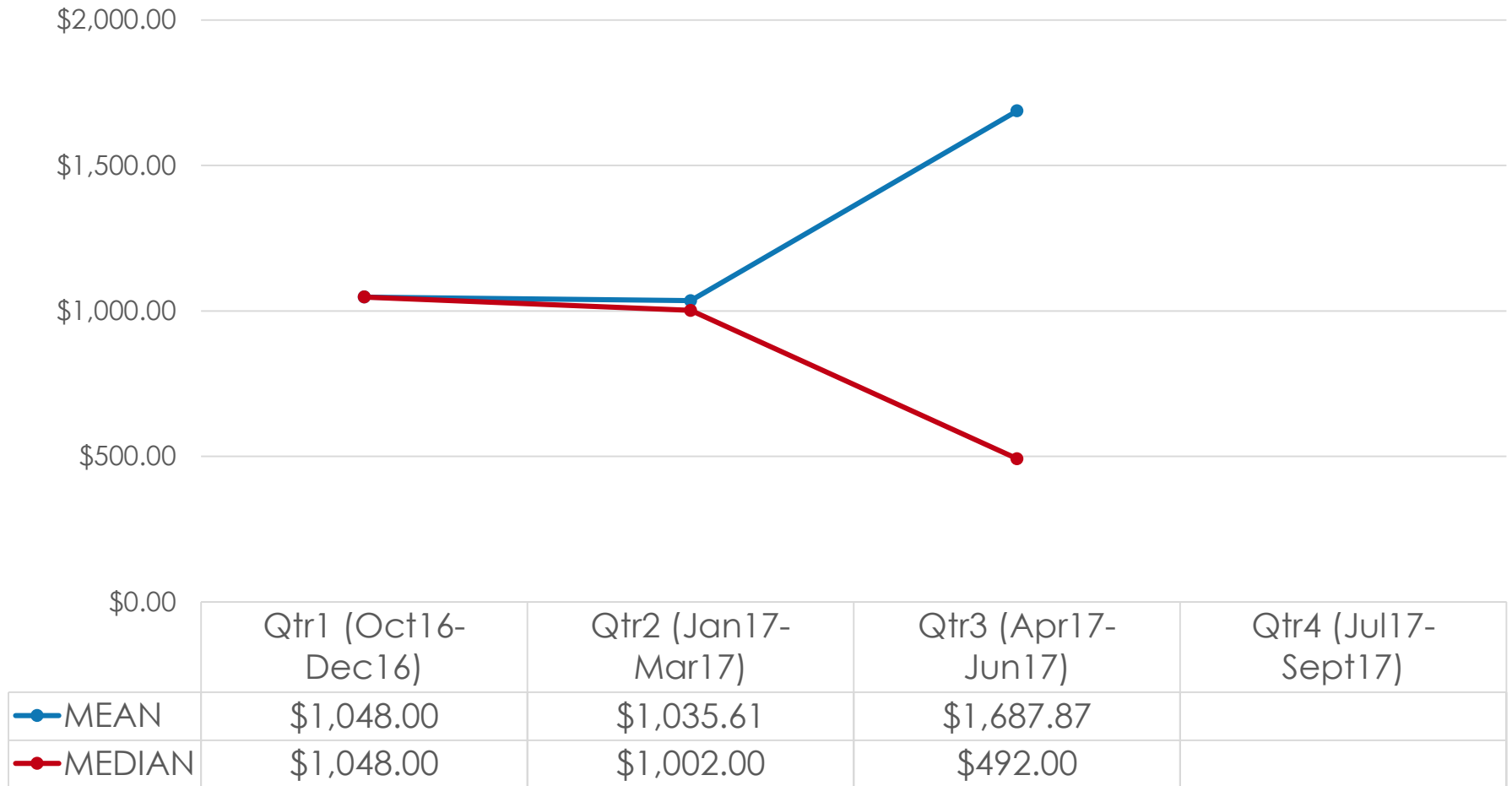
Prepaid– FY2017 Tracking

Airfare & Accommodation Packages



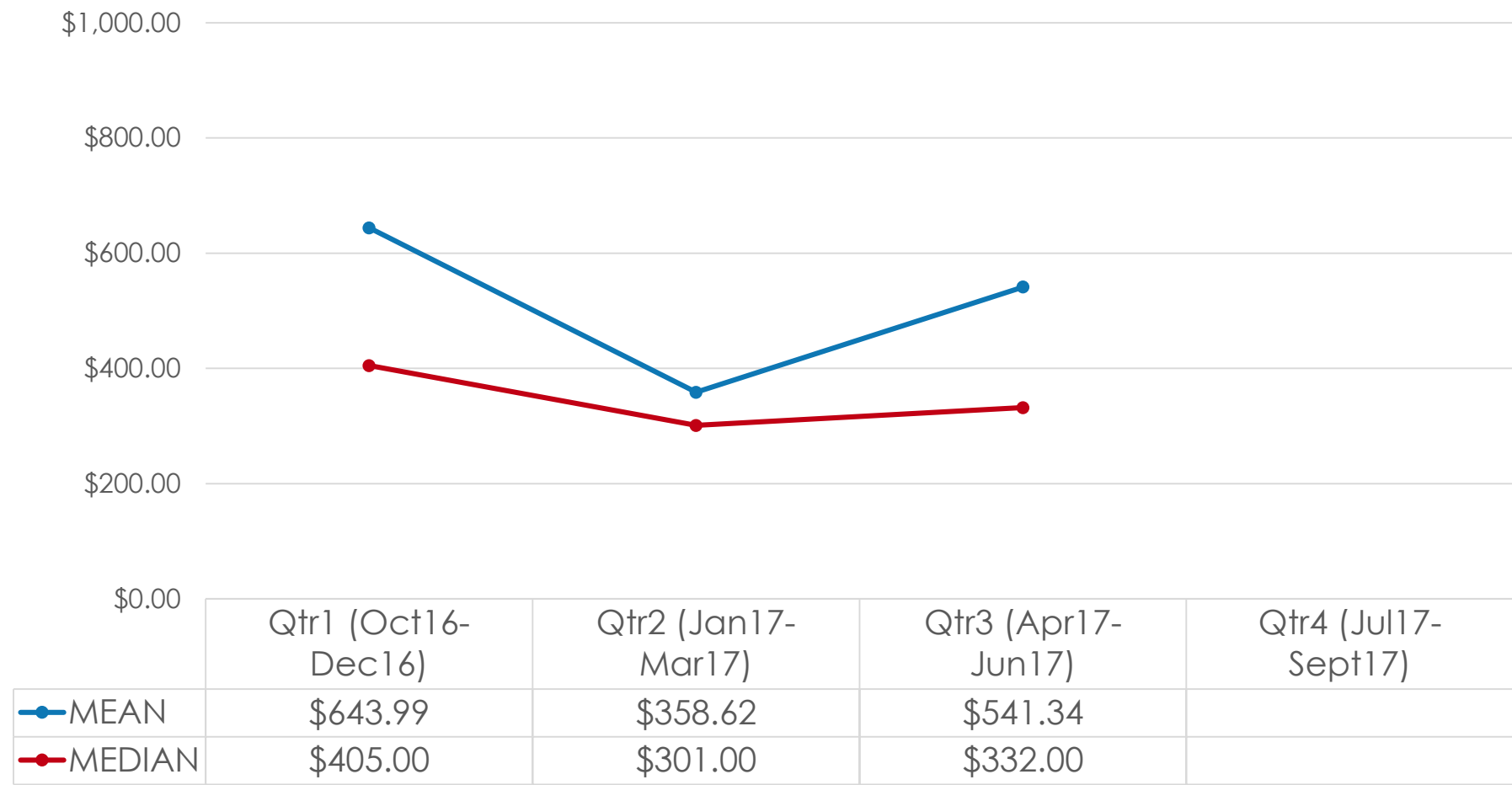
Prepaid– FY2017 Tracking

Airfare & Accommodation W/ Meal Packages

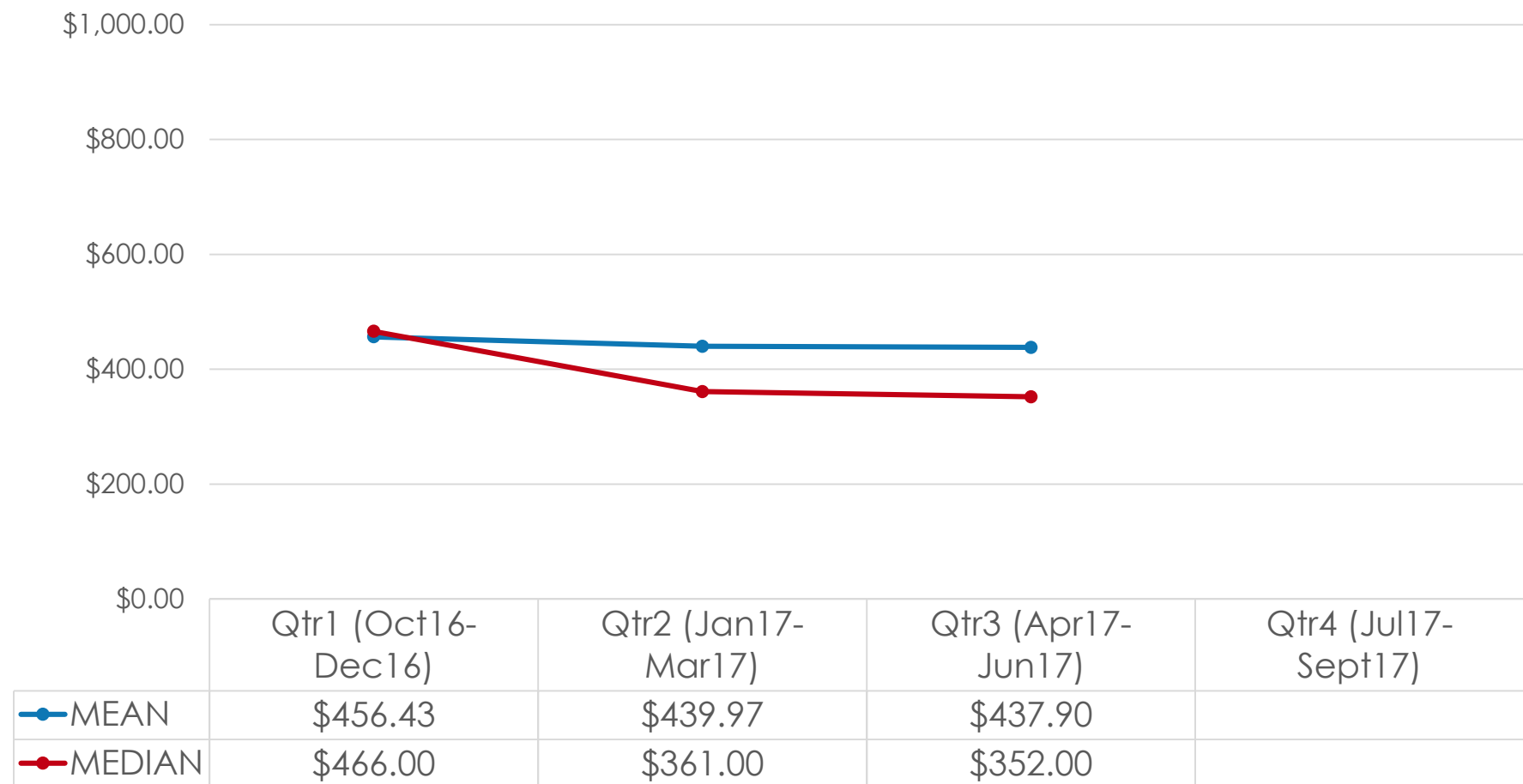


Prepaid– FY2017 Tracking

Airfare Only

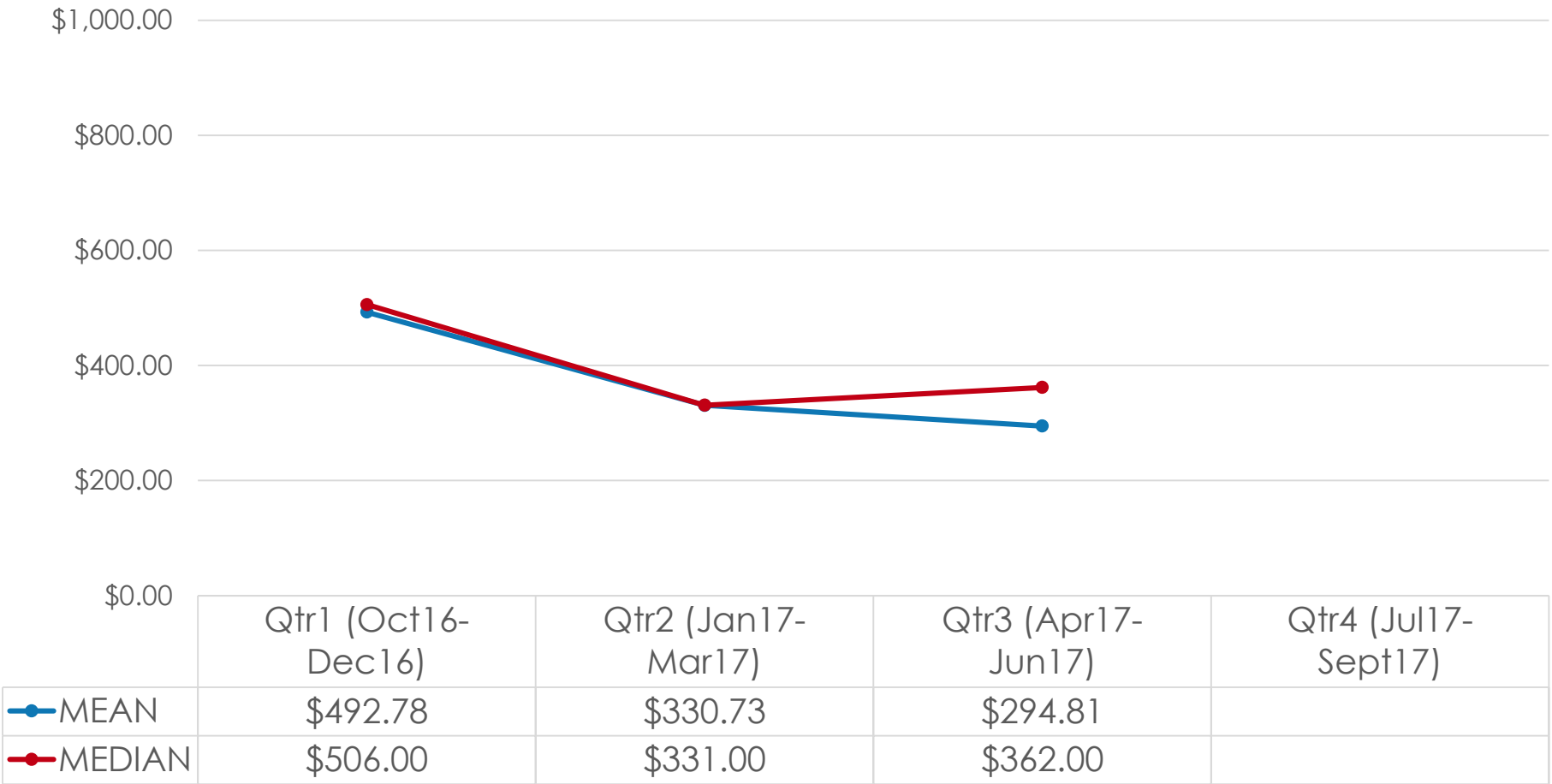


Prepaid– FY2017 Tracking Accommodations Only



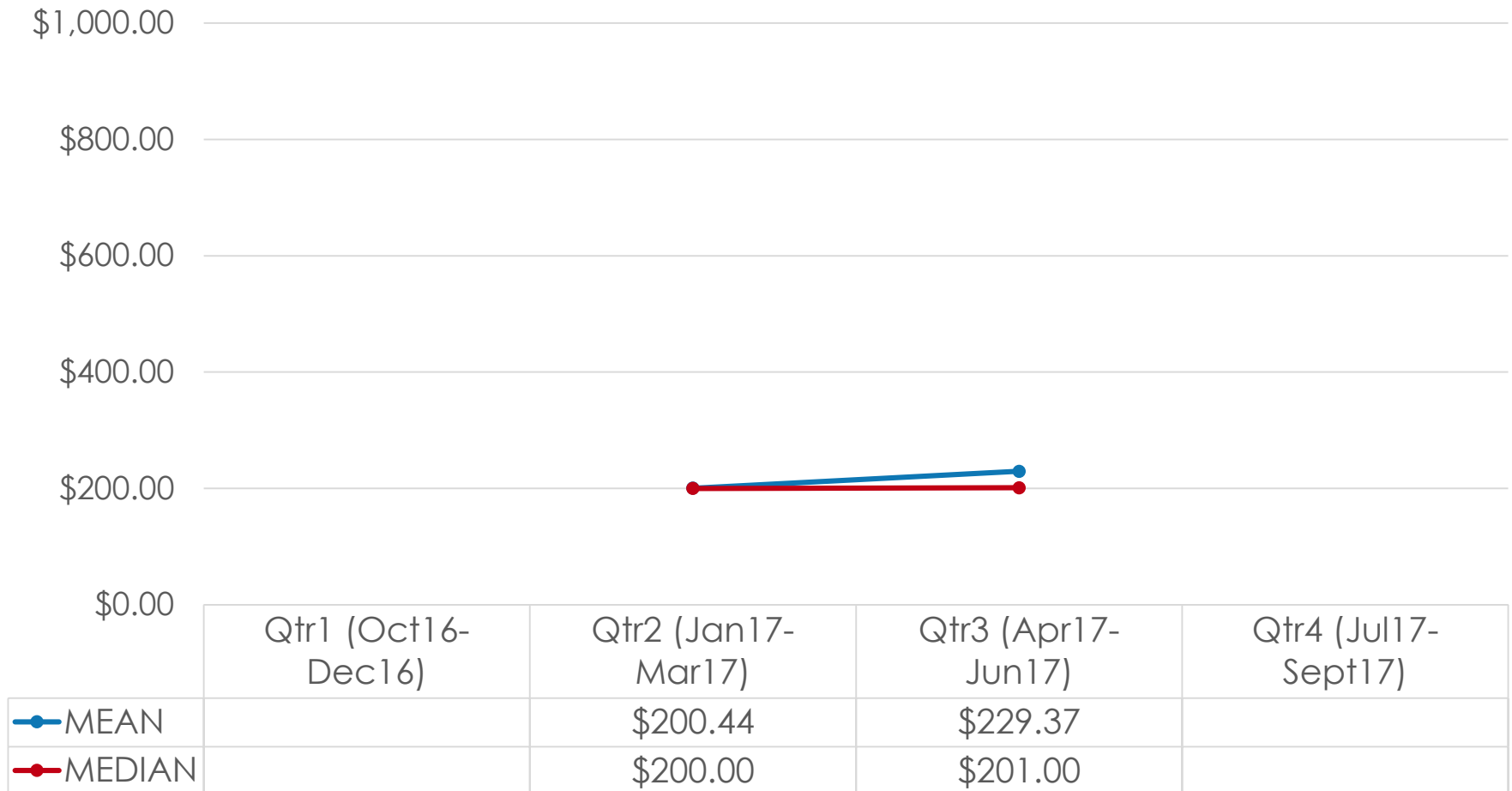
Prepaid– FY2017 Tracking

Accommodations w/ Meal Only



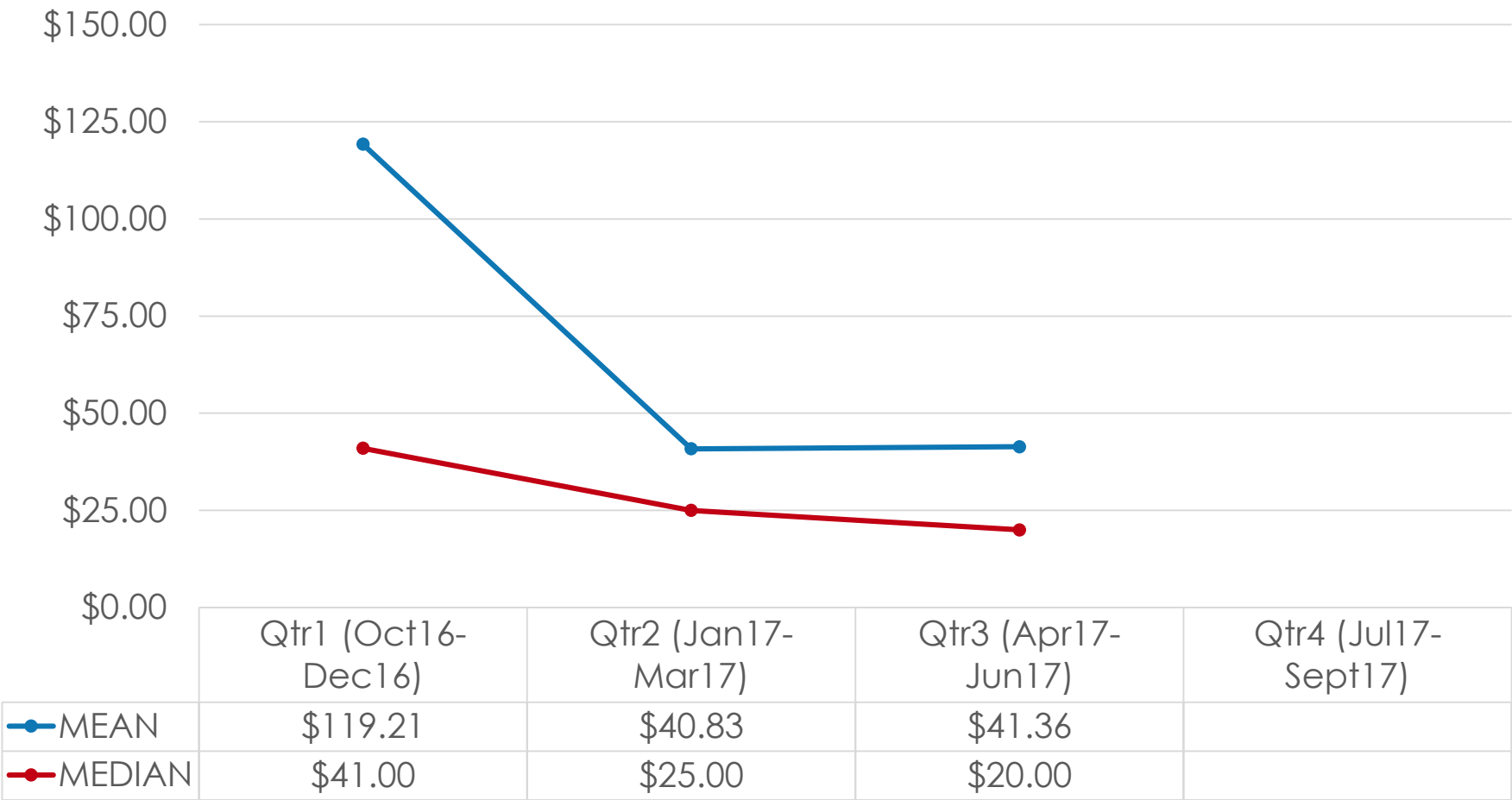
Prepaid– FY2017 Tracking

Food & Beverage in Hotel



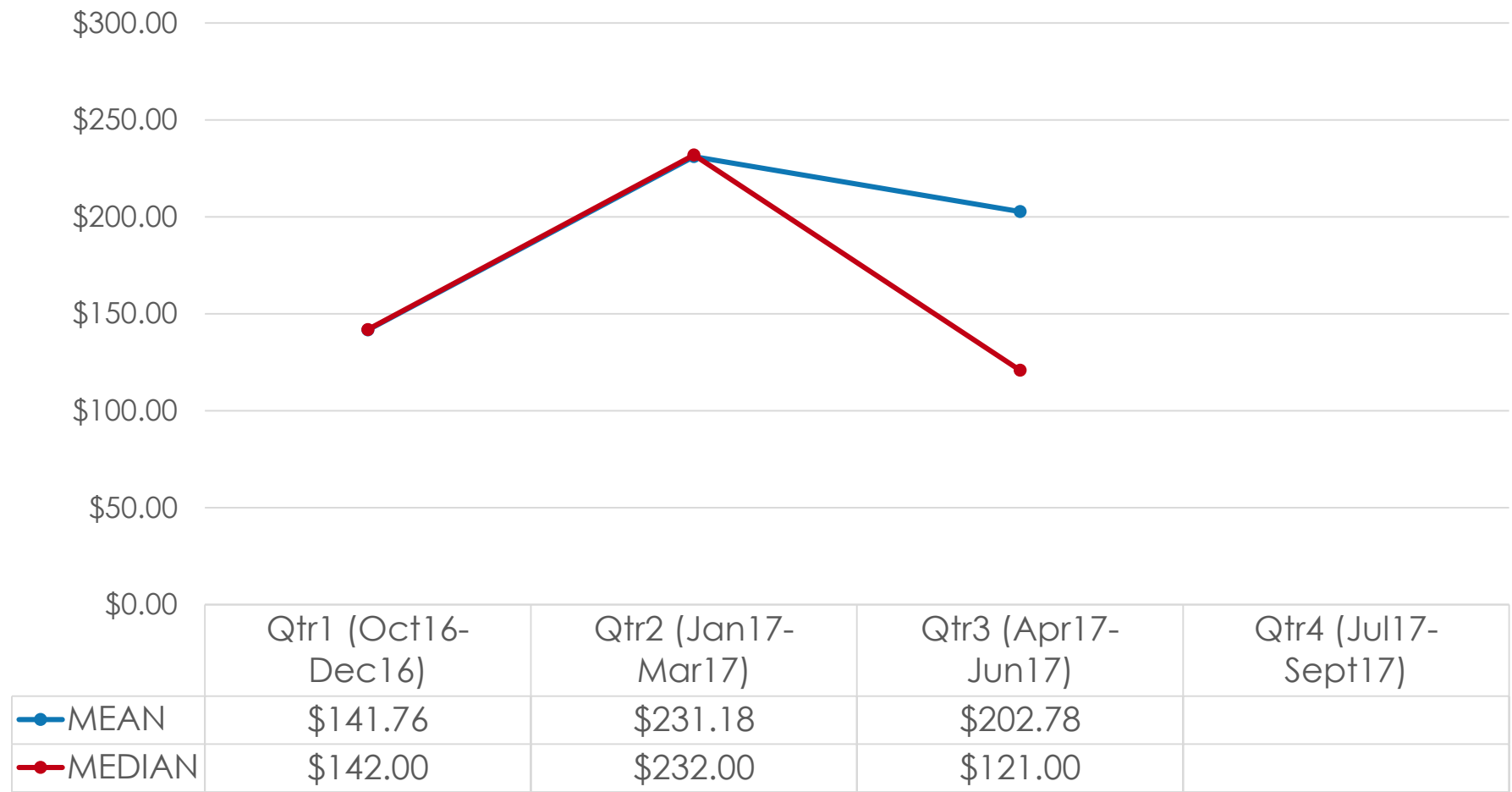
Prepaid– FY2017 Tracking

Ground Transportation - Philippines



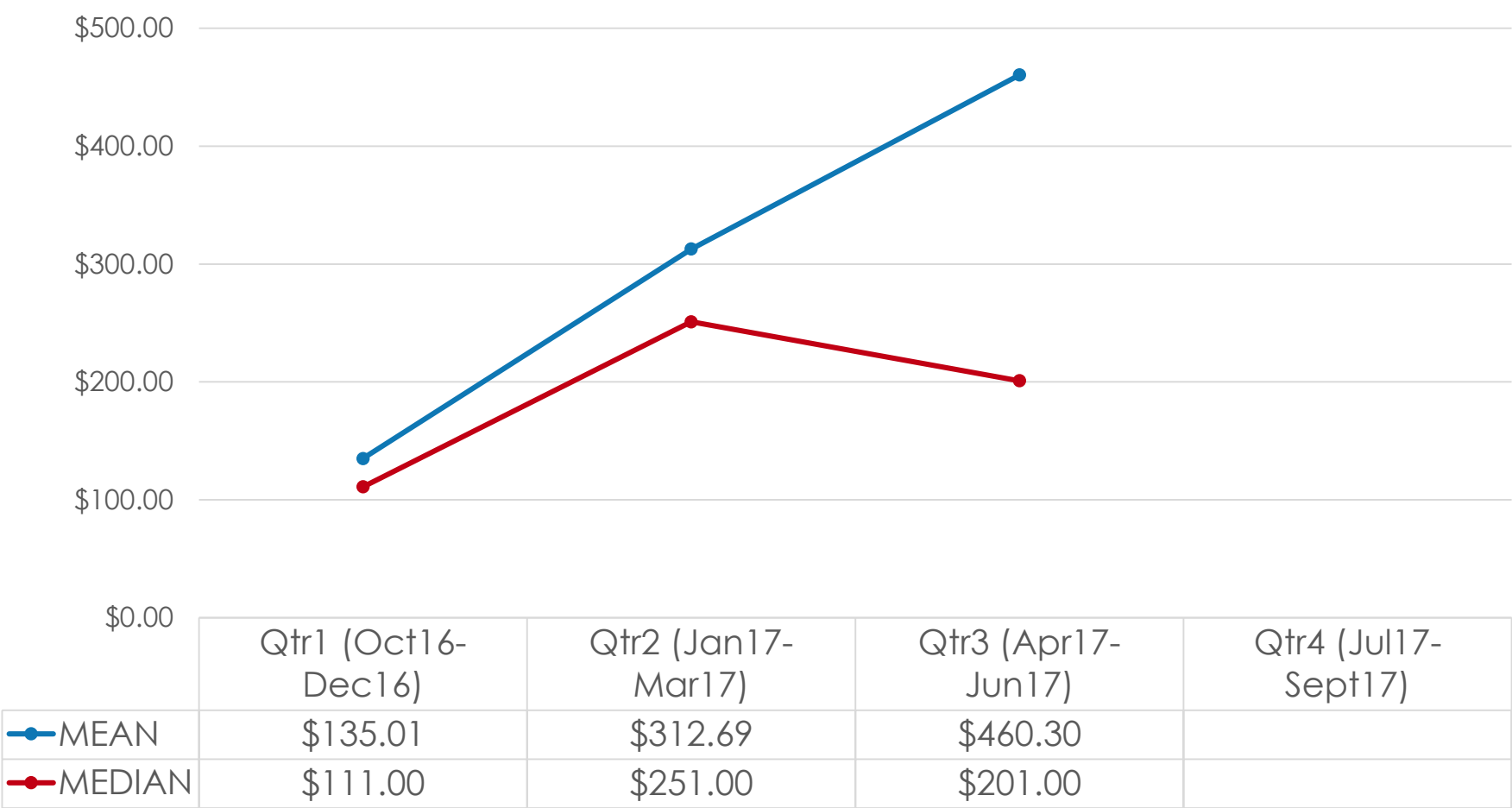
Prepaid– FY2017 Tracking

Ground Transportation - Guam



Prepaid– FY2017 Tracking

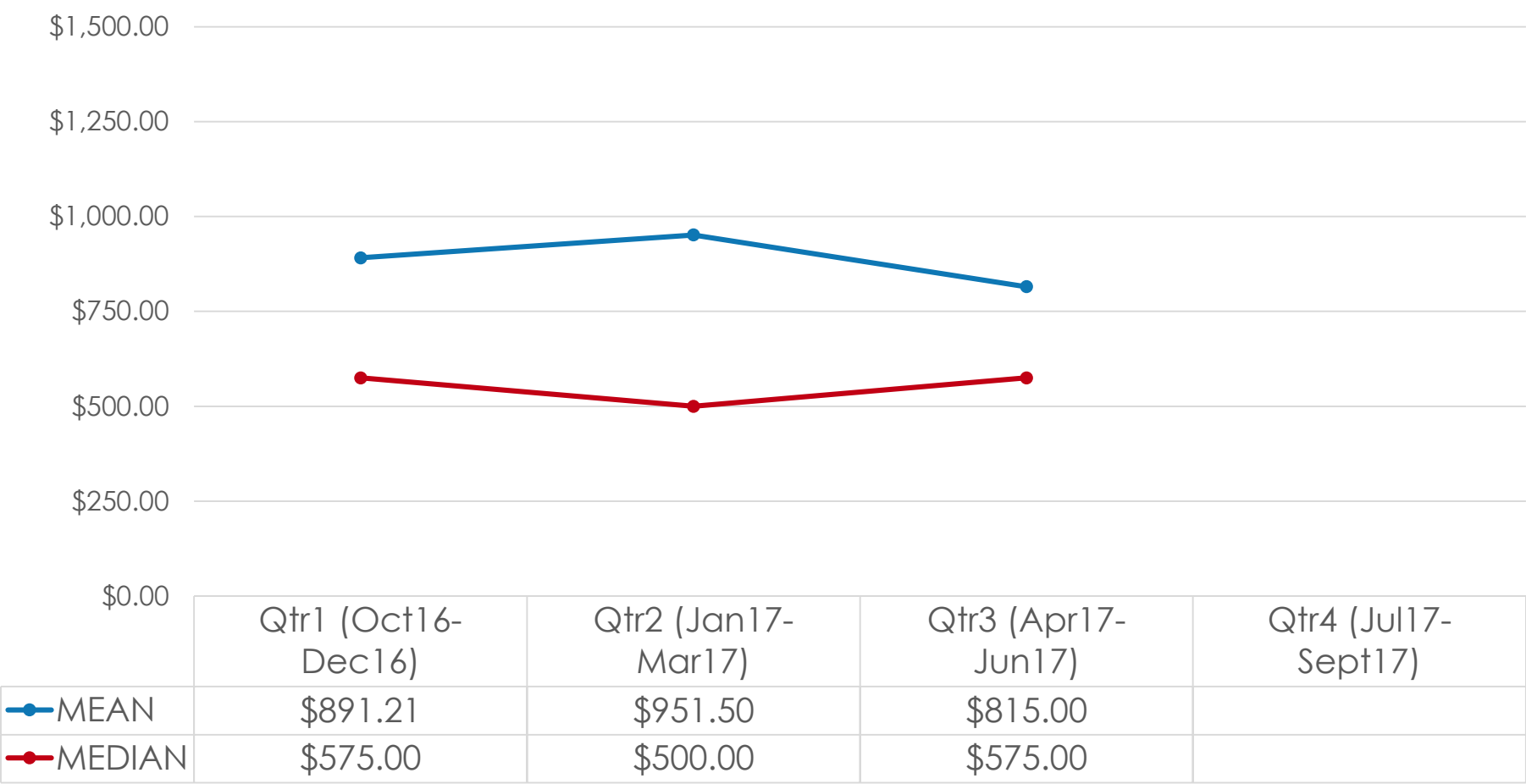
Optional tours/ Activities



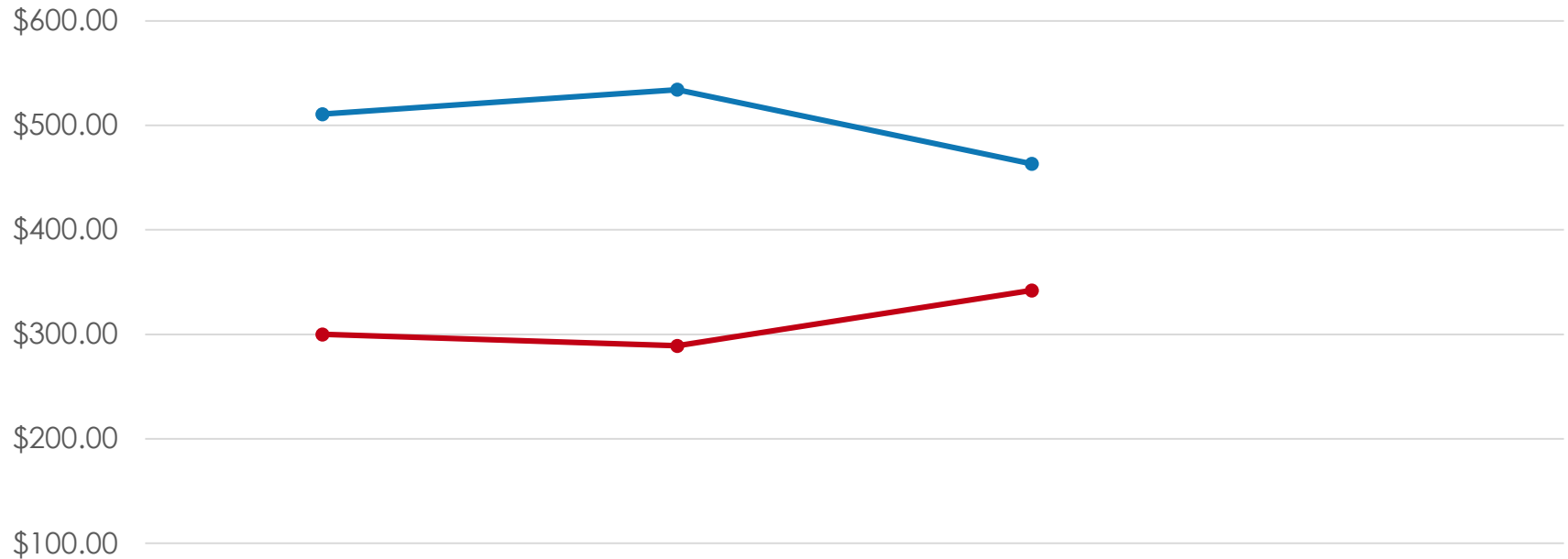
On-Island Expenditures

- \$815.00 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$463.20 = overall mean average per person prepaid expenditures

On-Island Entire Travel Party – FY2017 Tracking



On-Island Per Person – FY2017 Tracking



	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	\$510.72	\$534.09	\$463.20	
MEDIAN	\$300.00	\$289.00	\$342.00	

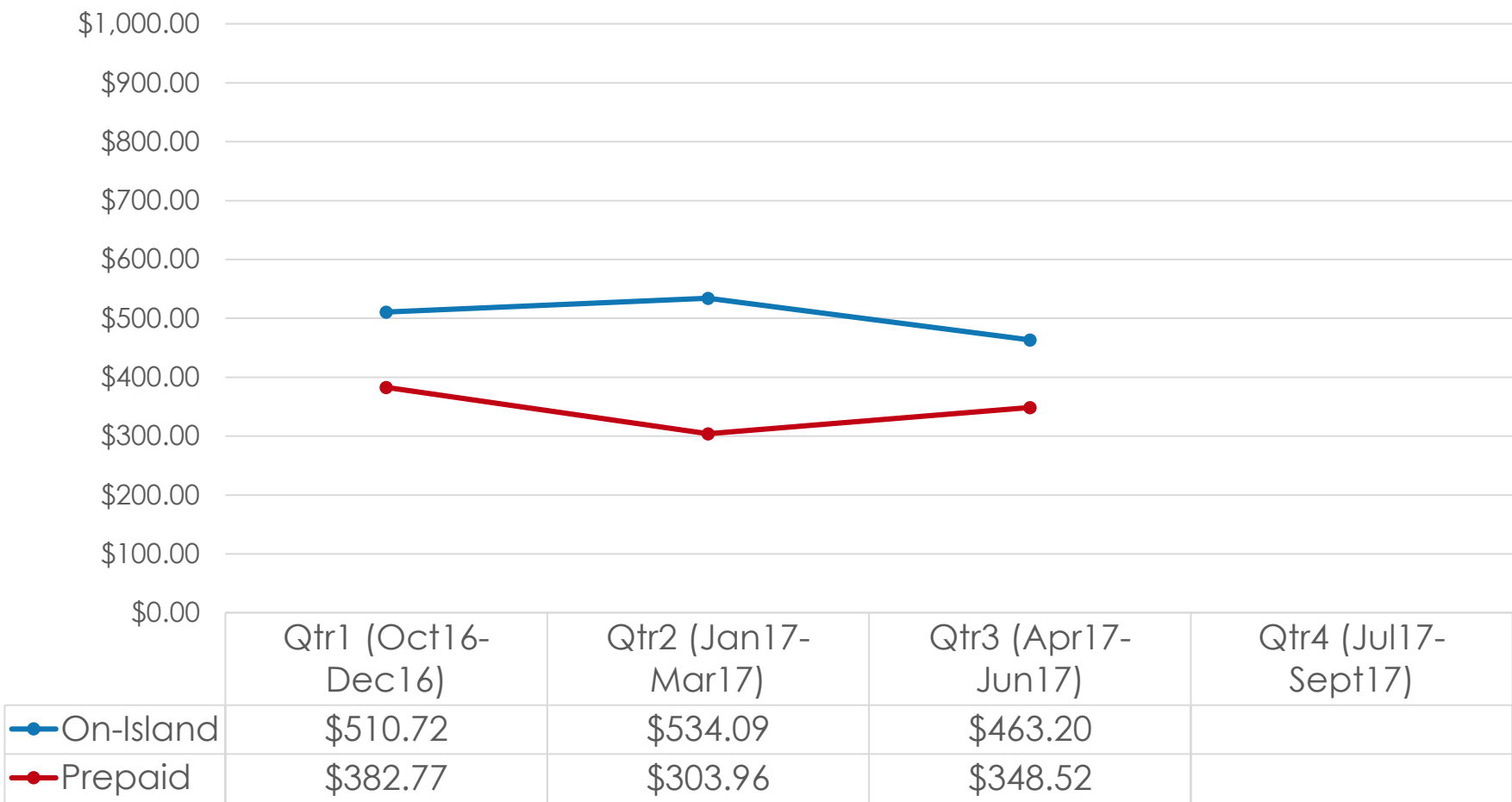
On-Island Per Person – Key Segments

GVB EXIT SURVEY
Q11A ONISLE EXPENDITURE- PER PERSO

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
ONISLE PP	Mean	\$463.20	\$413.61	\$456.31	\$470.23	\$490.52
	Median	\$342	\$475	\$327	\$342	\$363

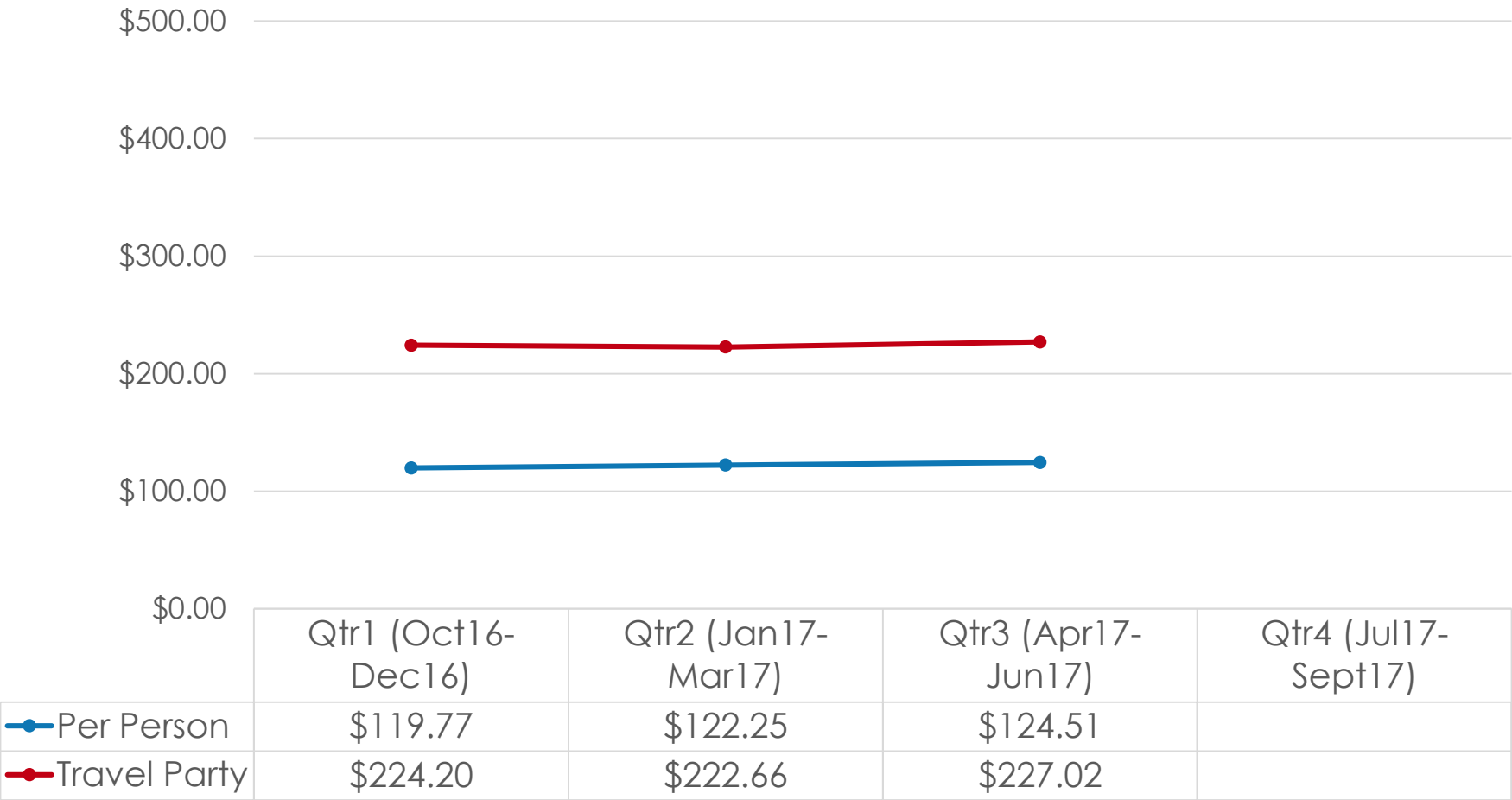
Prepared by Anthology Research

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



On-Island Per Day Spending – FY2017 Tracking

MEAN

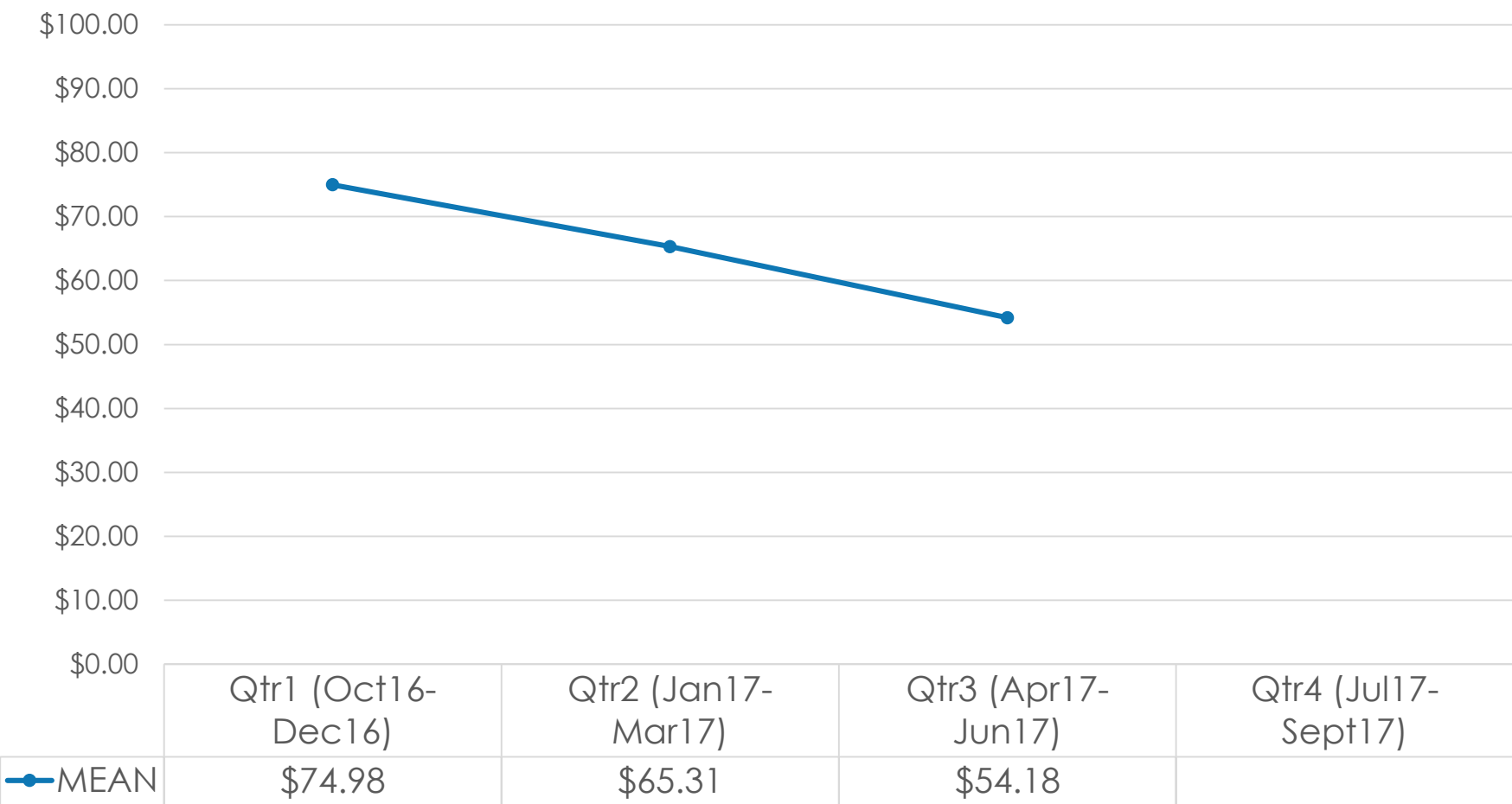


On-Island Expenses by Category – MEAN Entire Travel Party



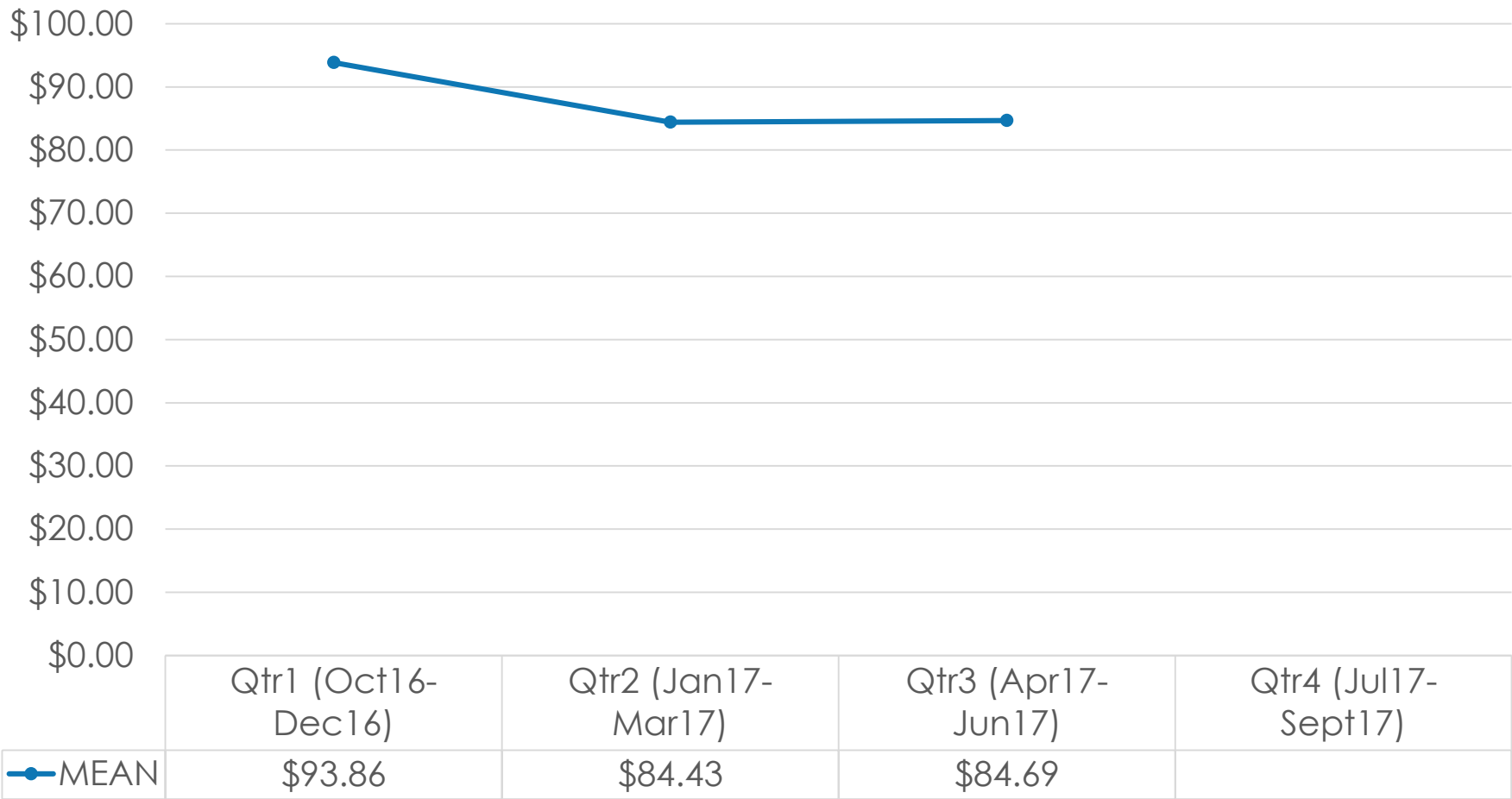
On-Island – FY2017 Tracking

Food & Beverage - Hotel



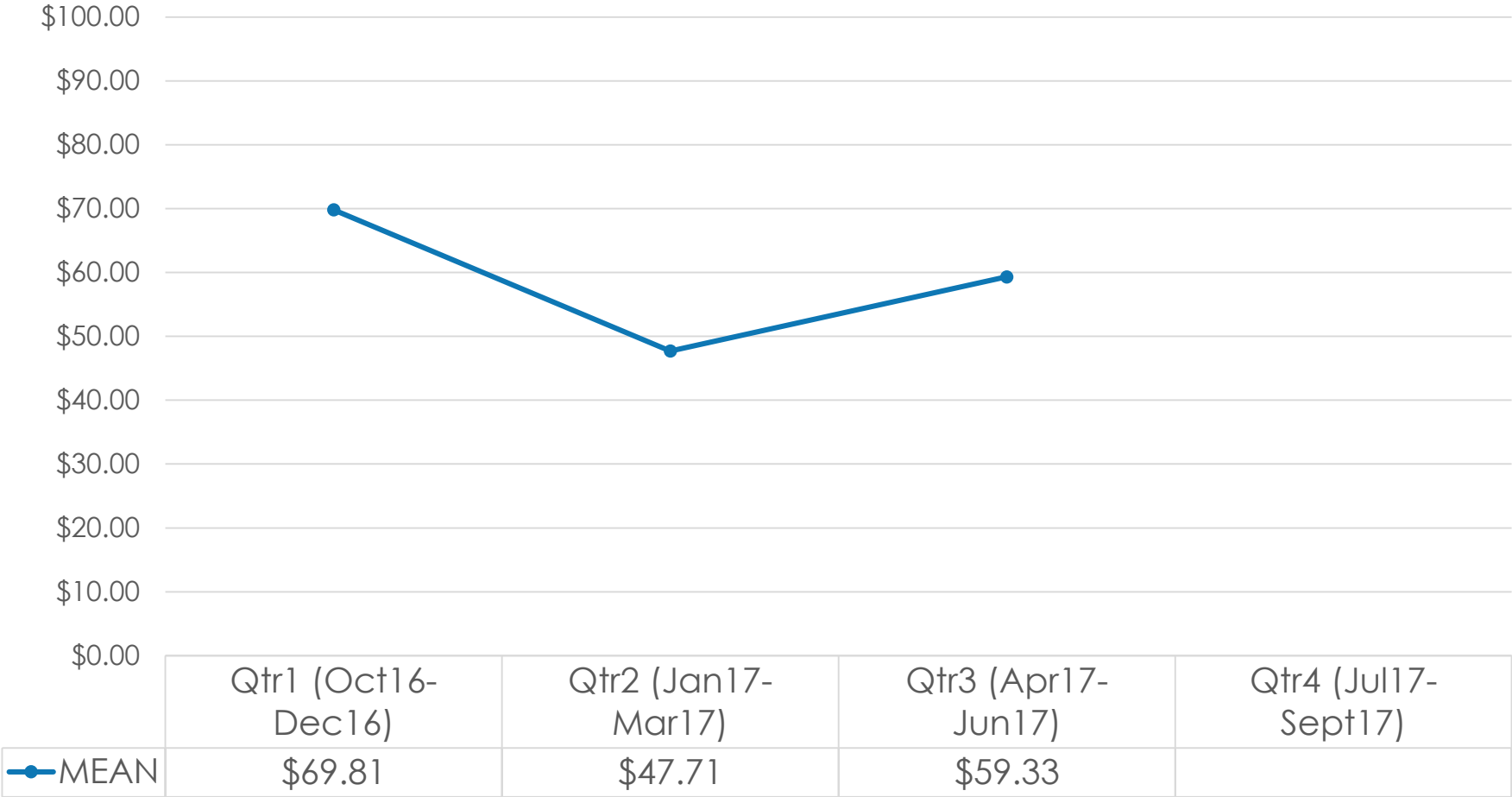
On-Island – FY2017 Tracking

Food & Beverage – Fast Food/ Convenience Store



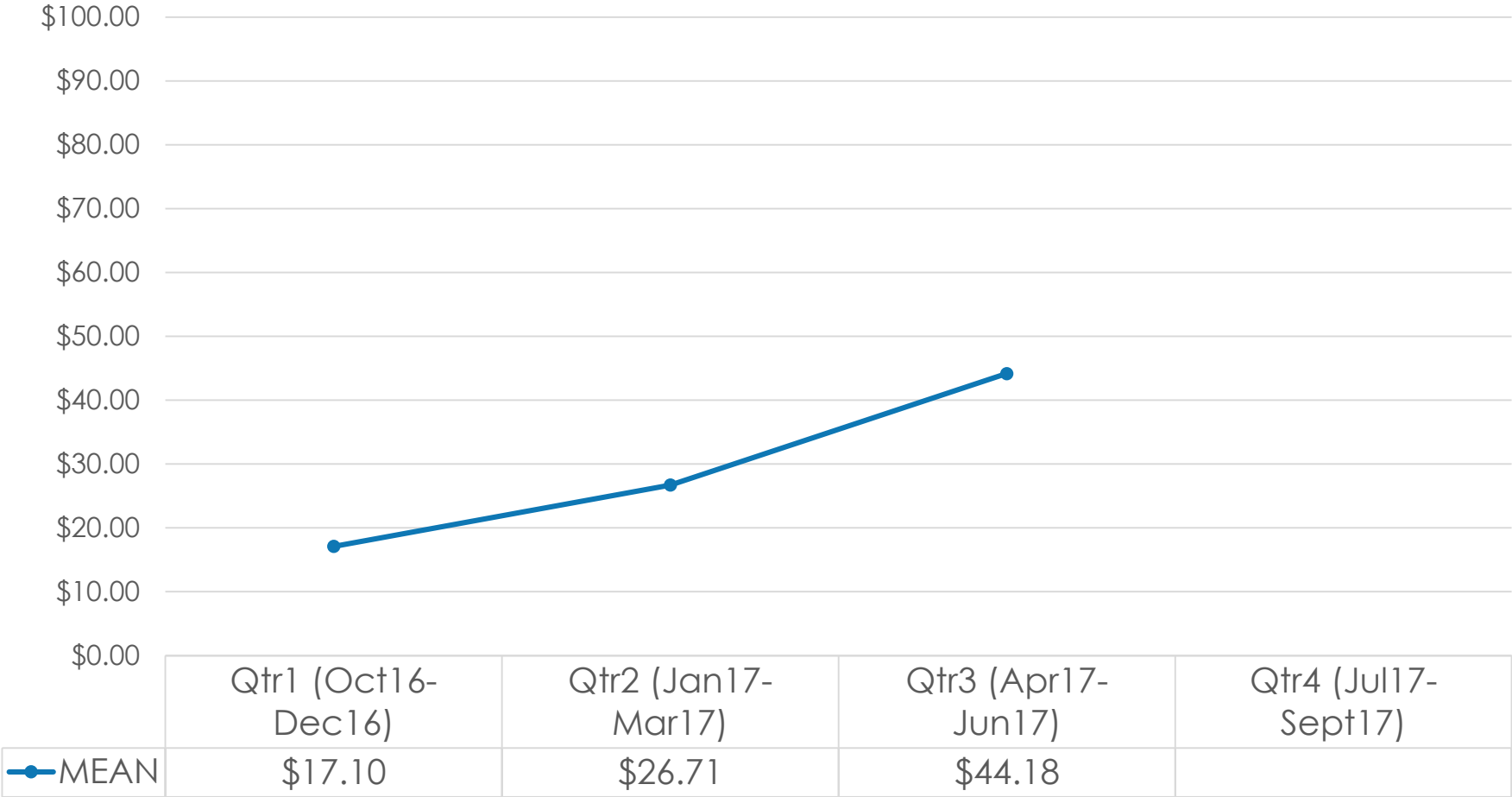
On-Island – FY2017 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



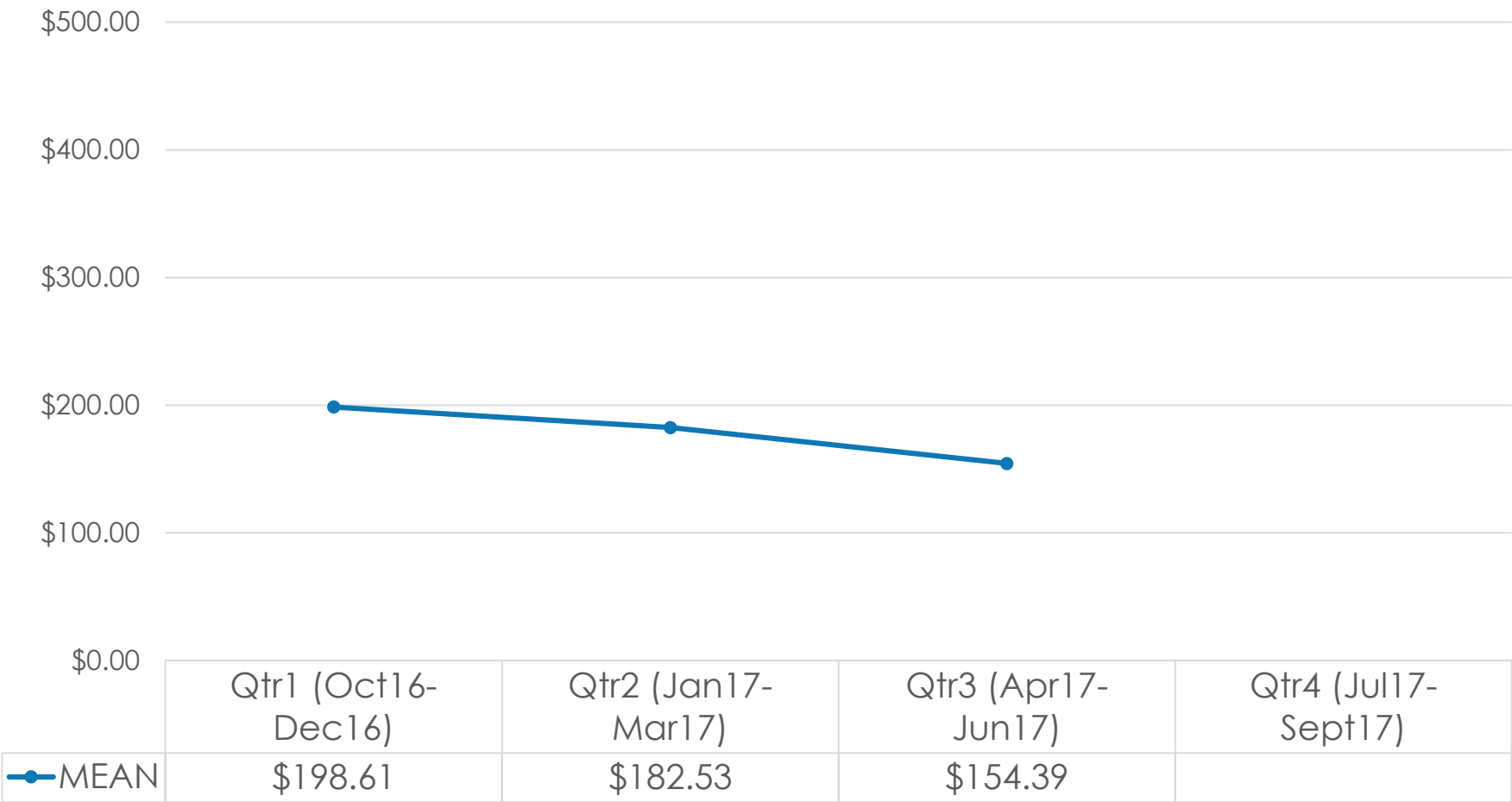
On-Island – FY2017 Tracking

Optional tour/ Activities



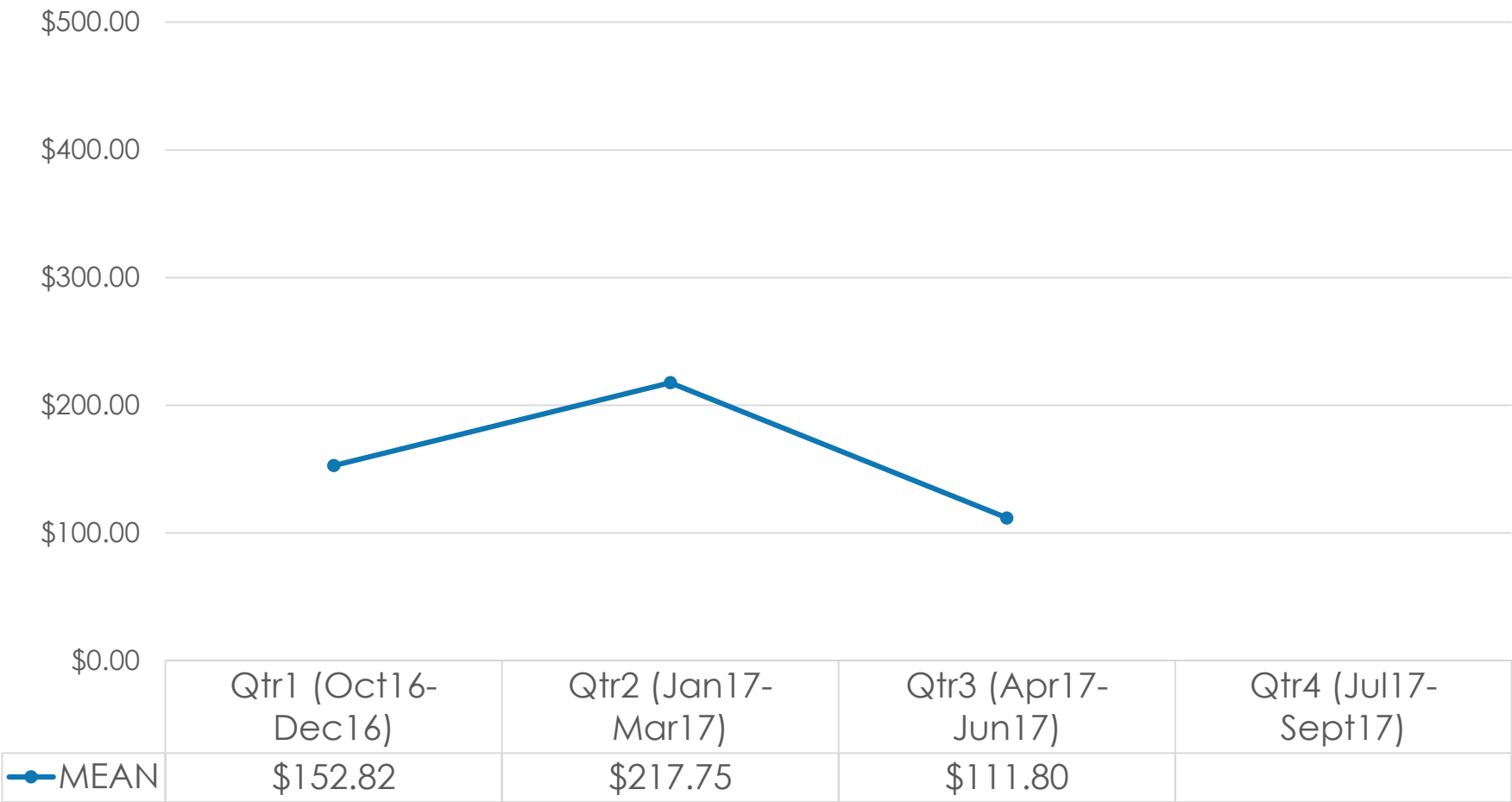
On-Island – FY2017 Tracking

Gift/ Souvenir – Self/ Companion



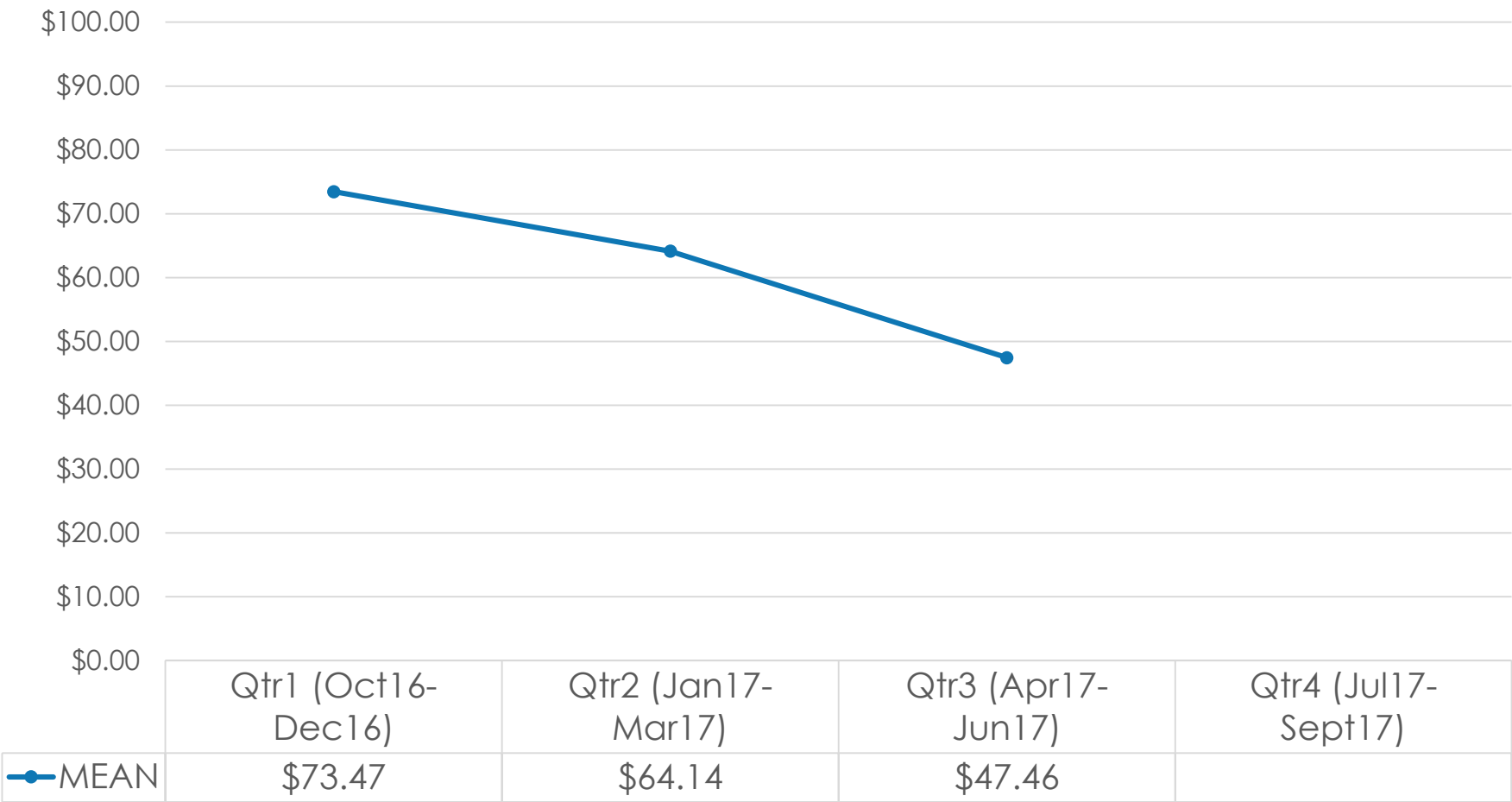
On-Island – FY2017 Tracking

Gift/ Souvenir – Friends/ Family



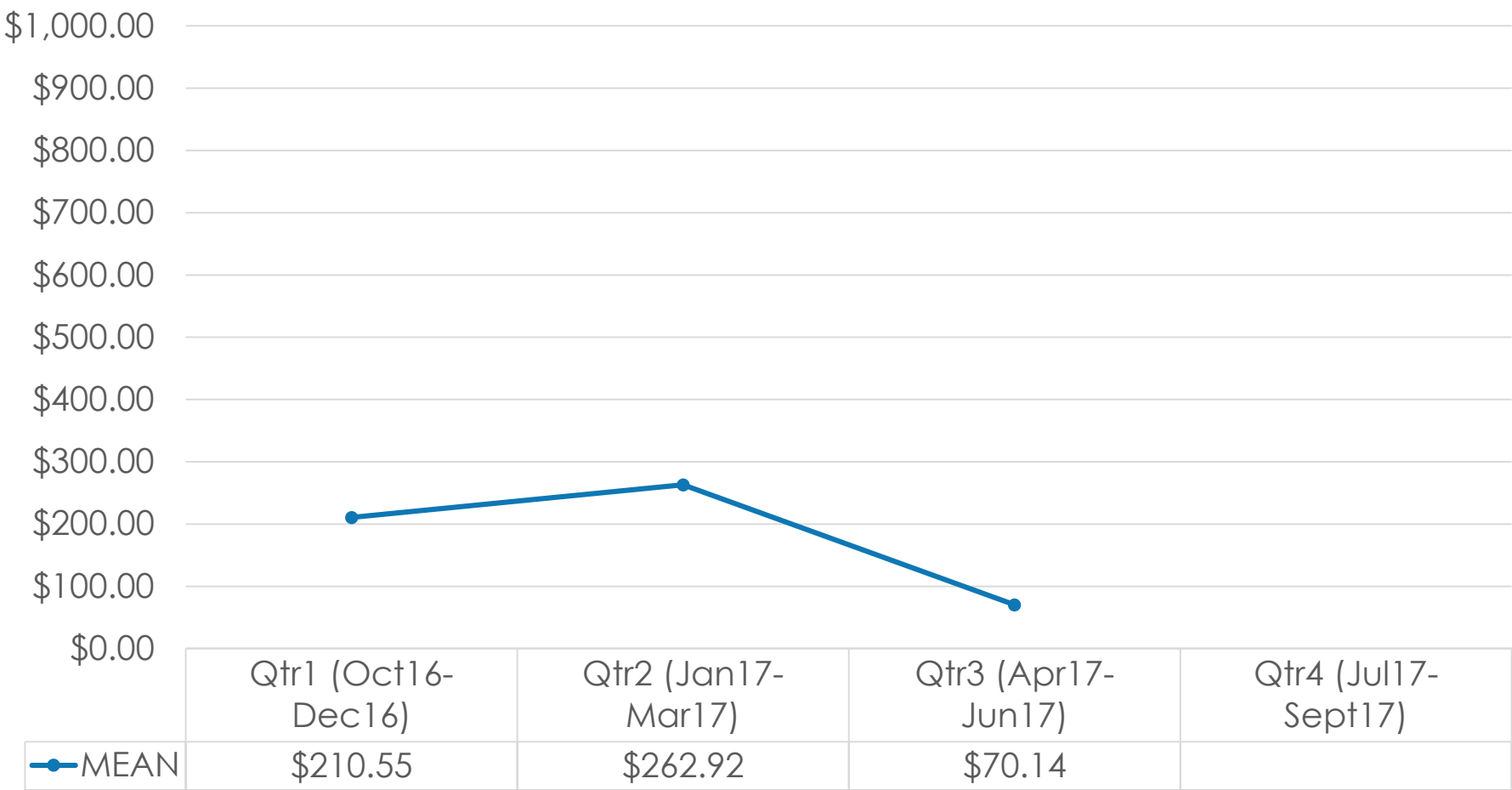
On-Island – FY2017 Tracking

Local Transportation



On-Island – FY2017 Tracking

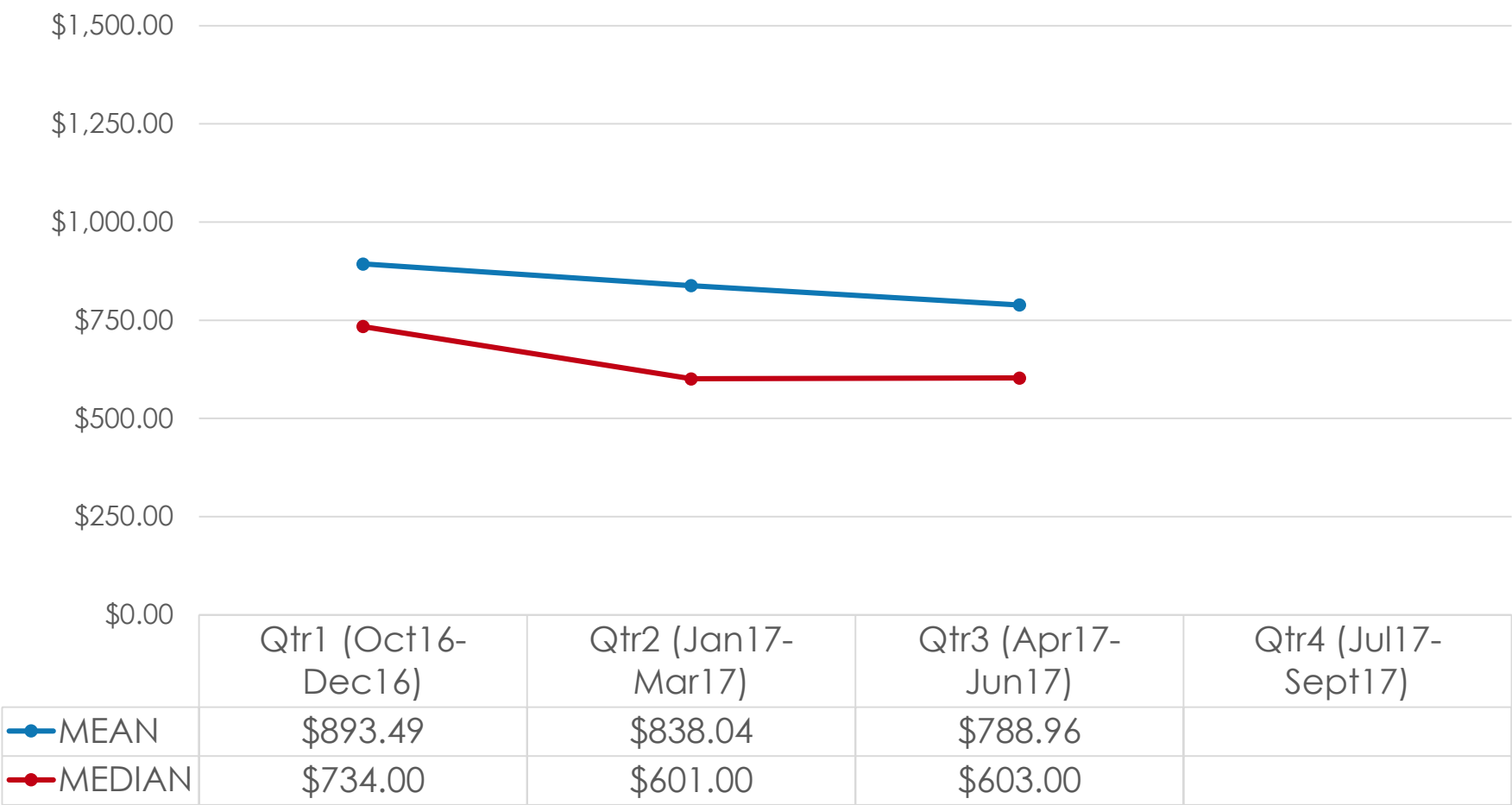
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$788.96 = overall mean average prepaid expense by respondent/ Per Person

TOTAL Per Person Expenditures – FY2017 Tracking



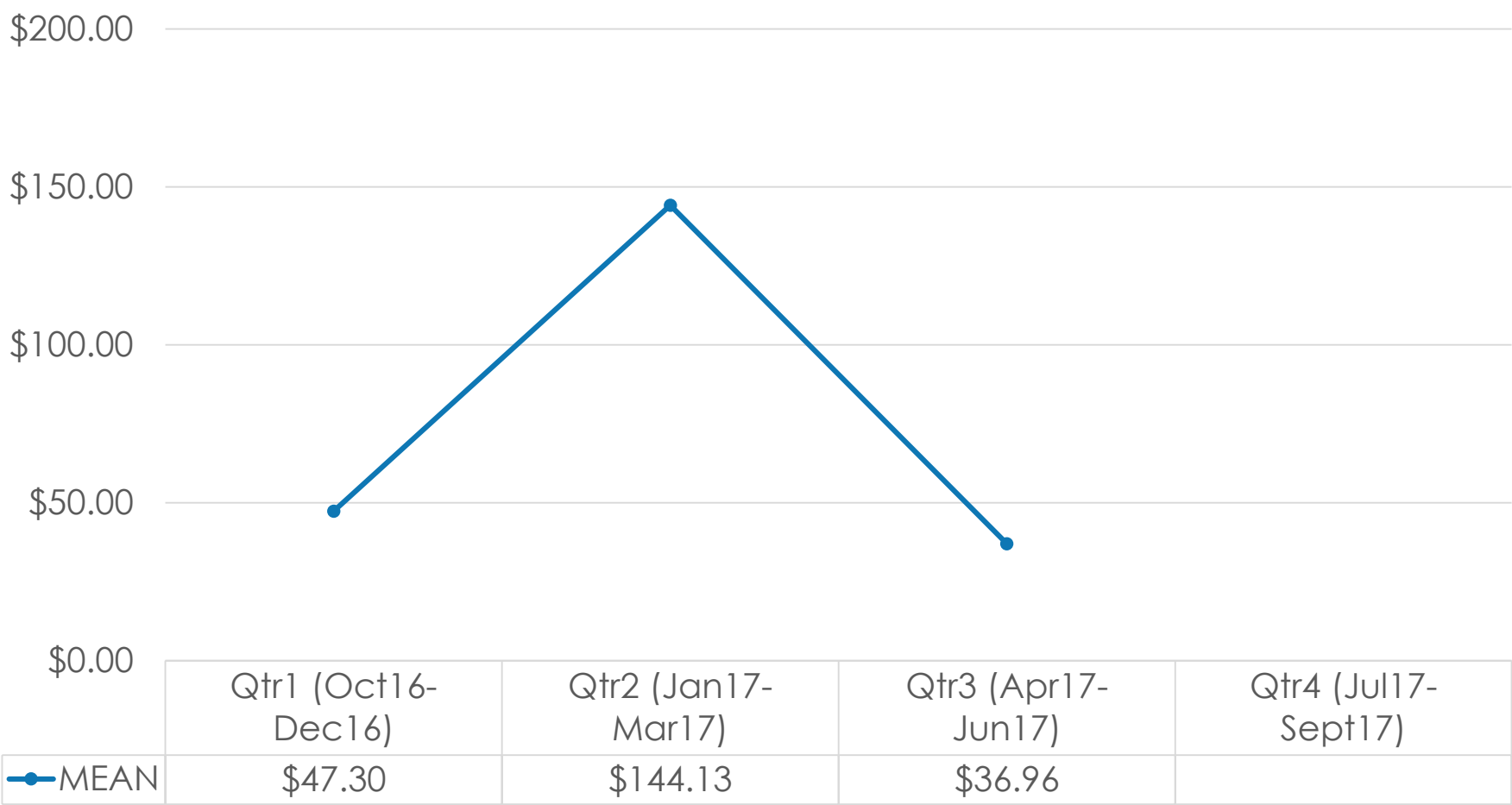
TOTAL Per Person Expenditures – Key Segments

**GVB EXIT SURVEY
TOTAL PER PERSON SPENDING:**

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
TOTAL PP	Mean	\$788.96	\$1,012.48	\$776.51	\$811.49	\$801.58
	Median	\$603	\$1,217	\$602	\$602	\$550

Prepared by Anthology Research

GUAM AIRPORT EXPENDITURE – FY2017 Tracking

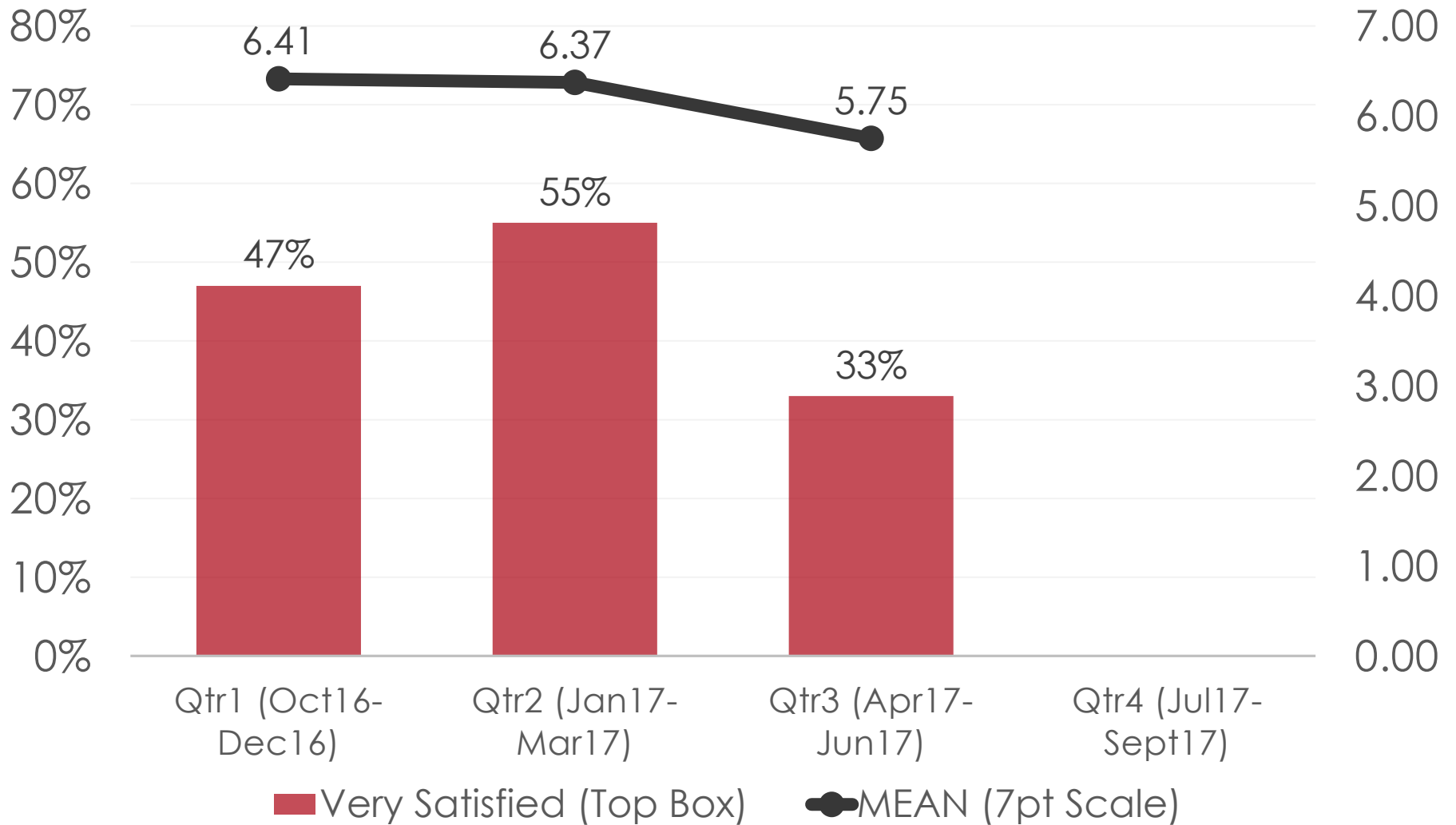


SECTION 4

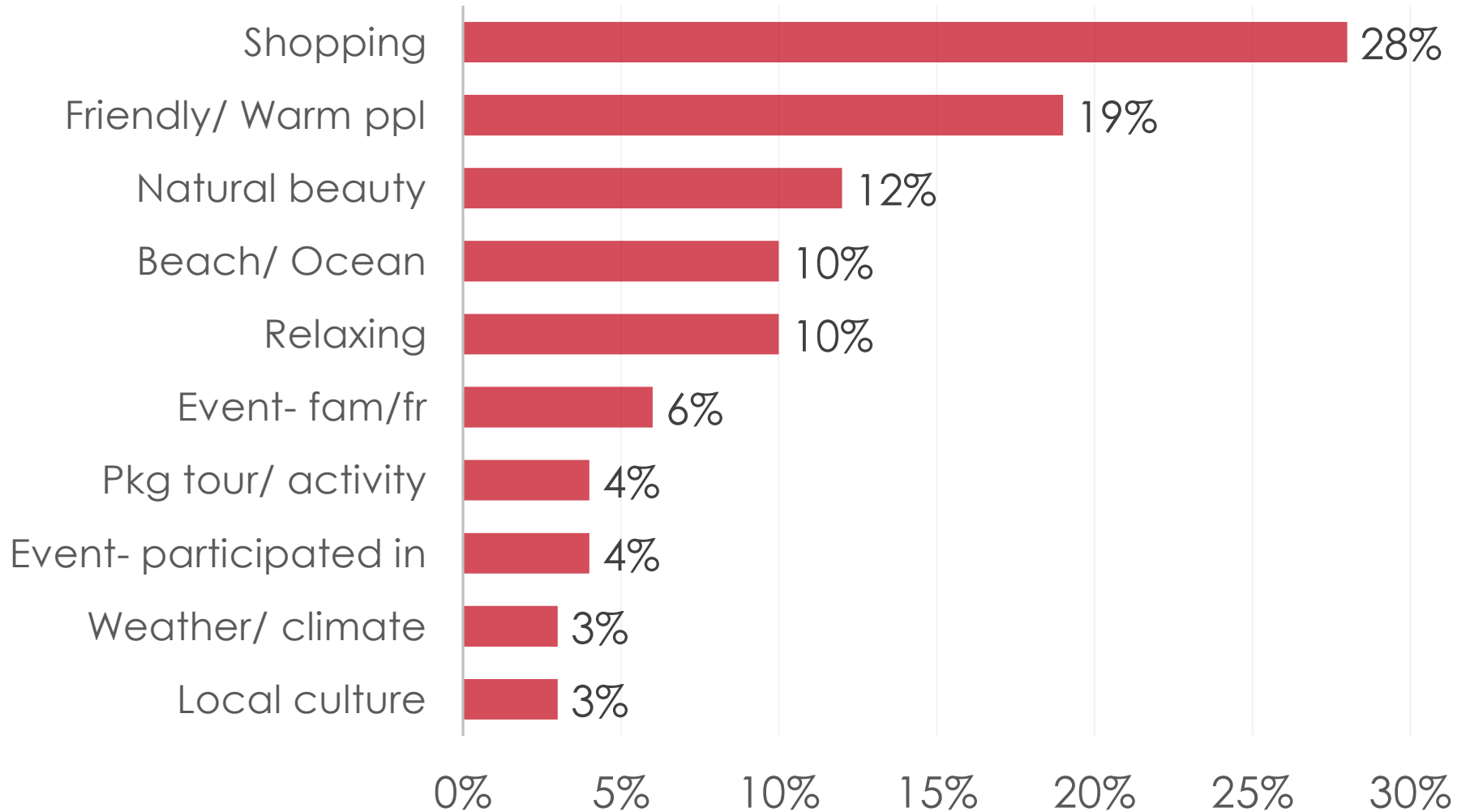
VISITOR SATISFACTION

BEHAVIOR

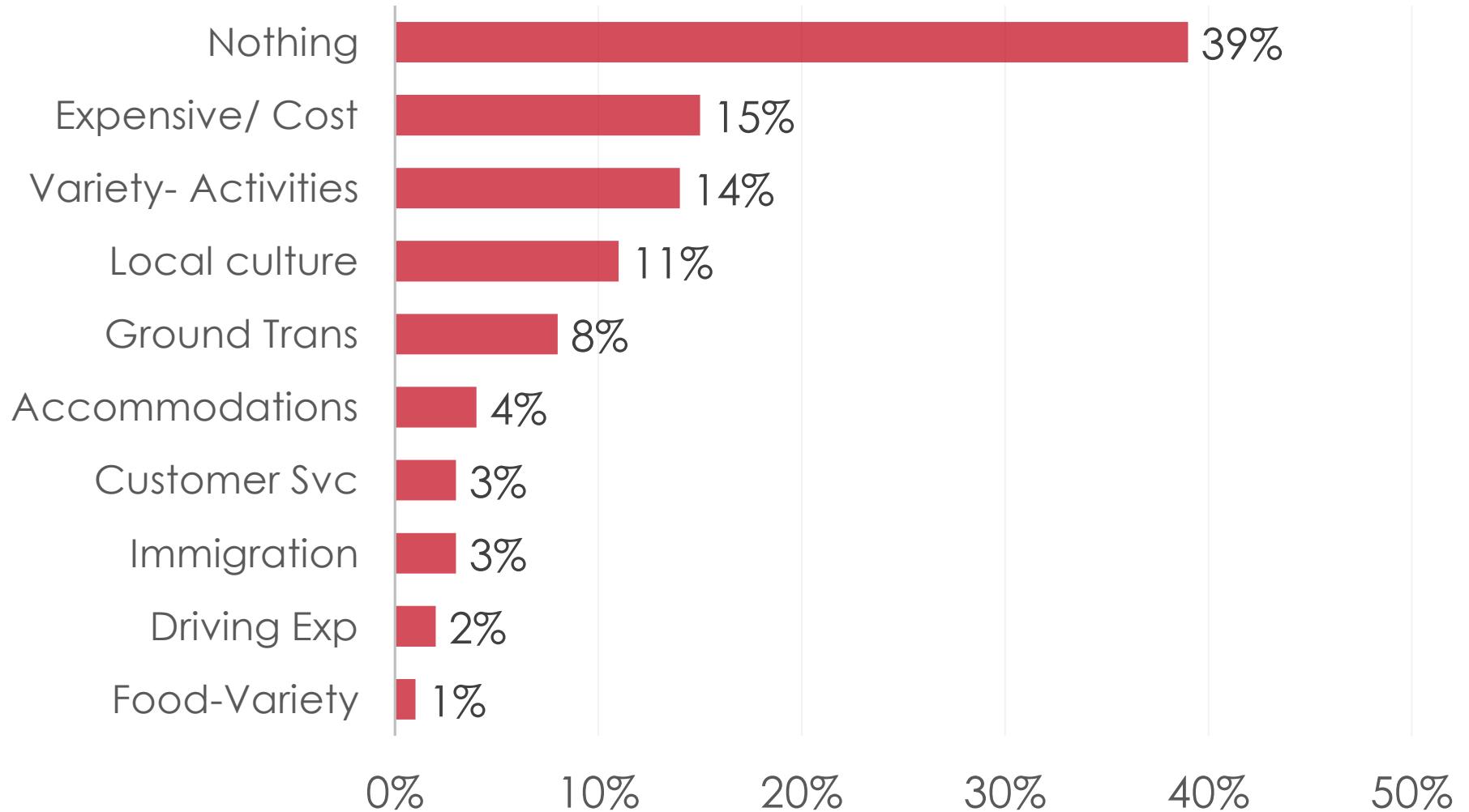
OVERALL SATISFACTION



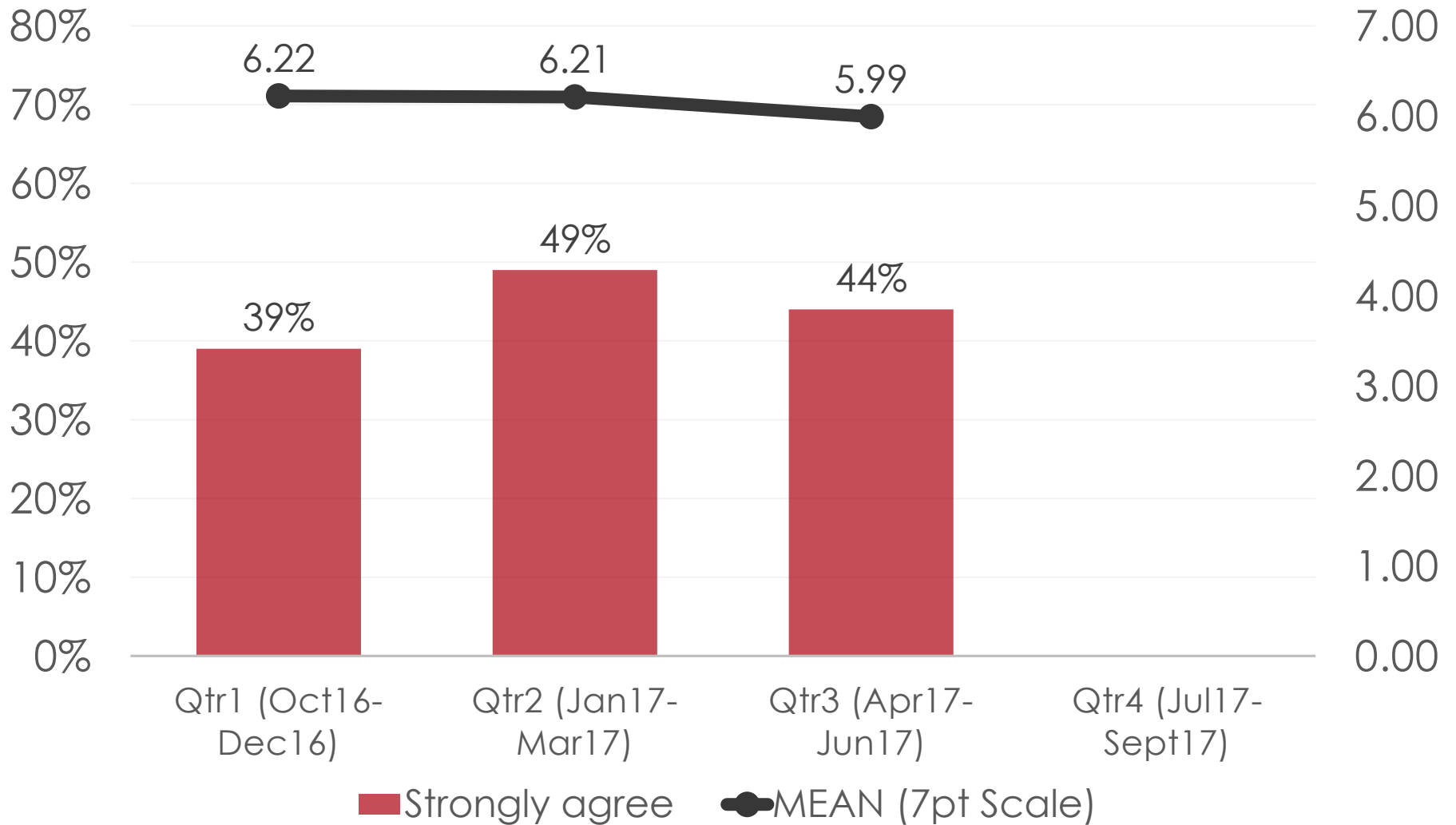
Positive Aspect of Trip



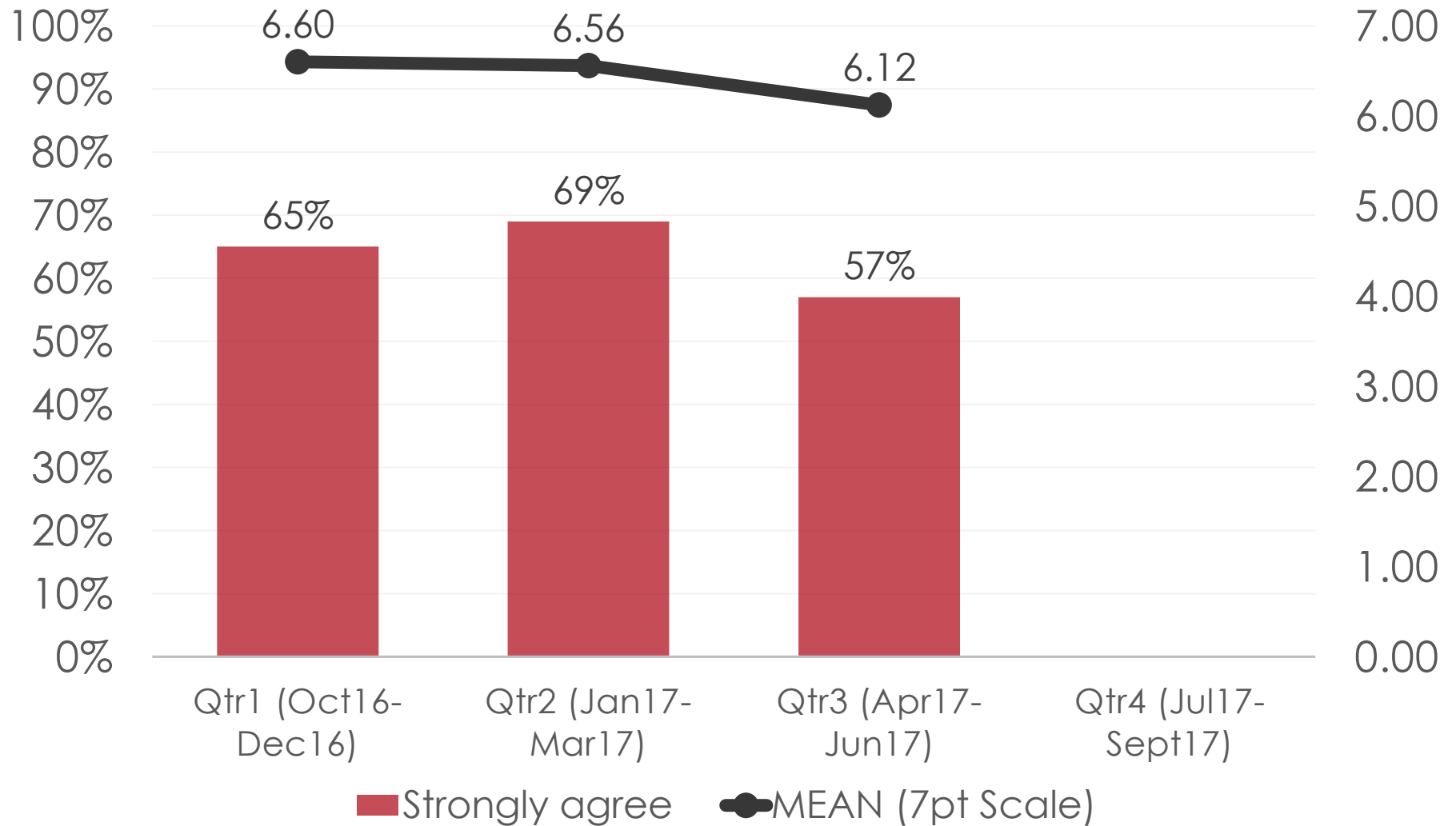
Negative Aspect of Trip



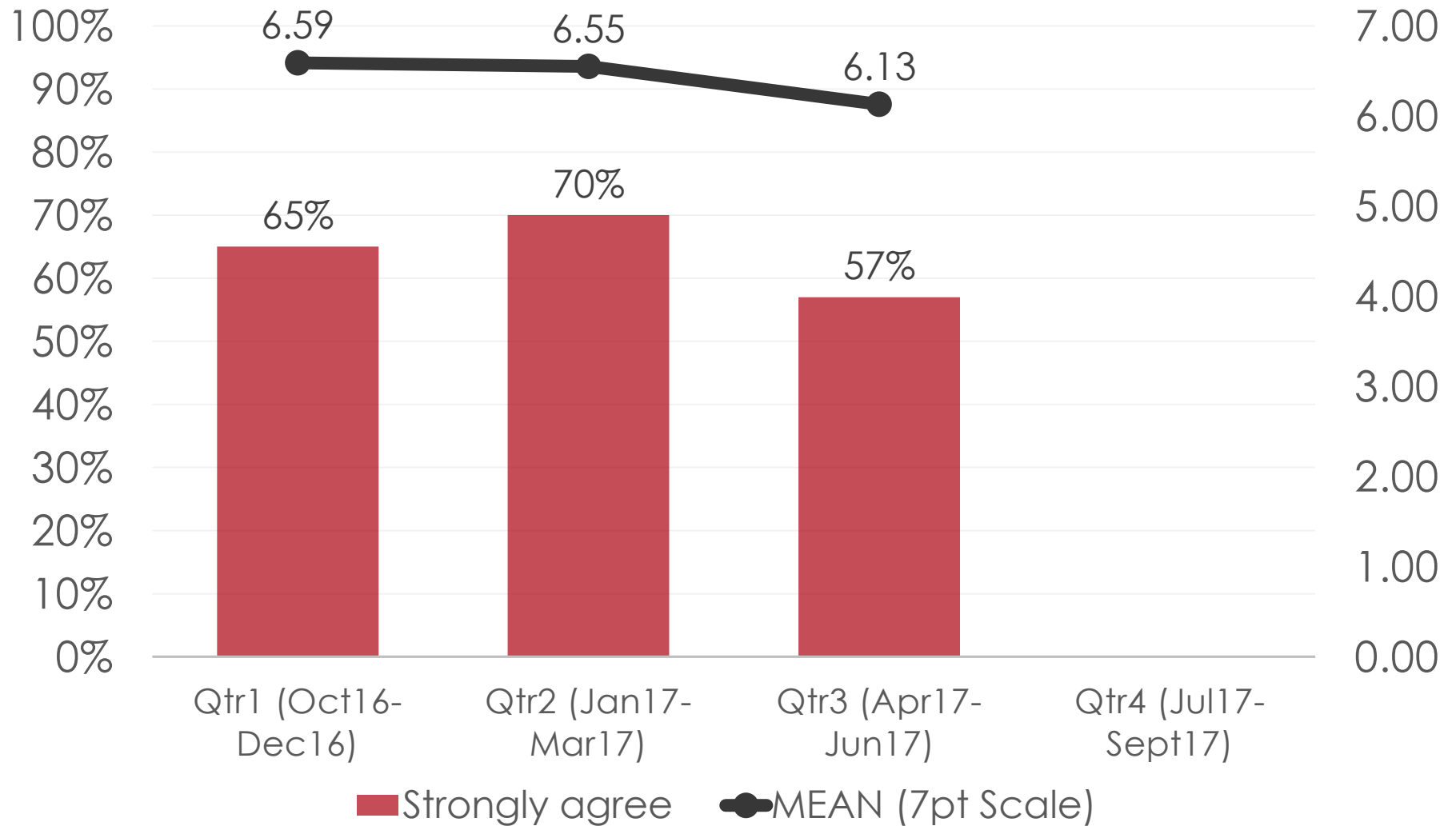
Guam was better than expected



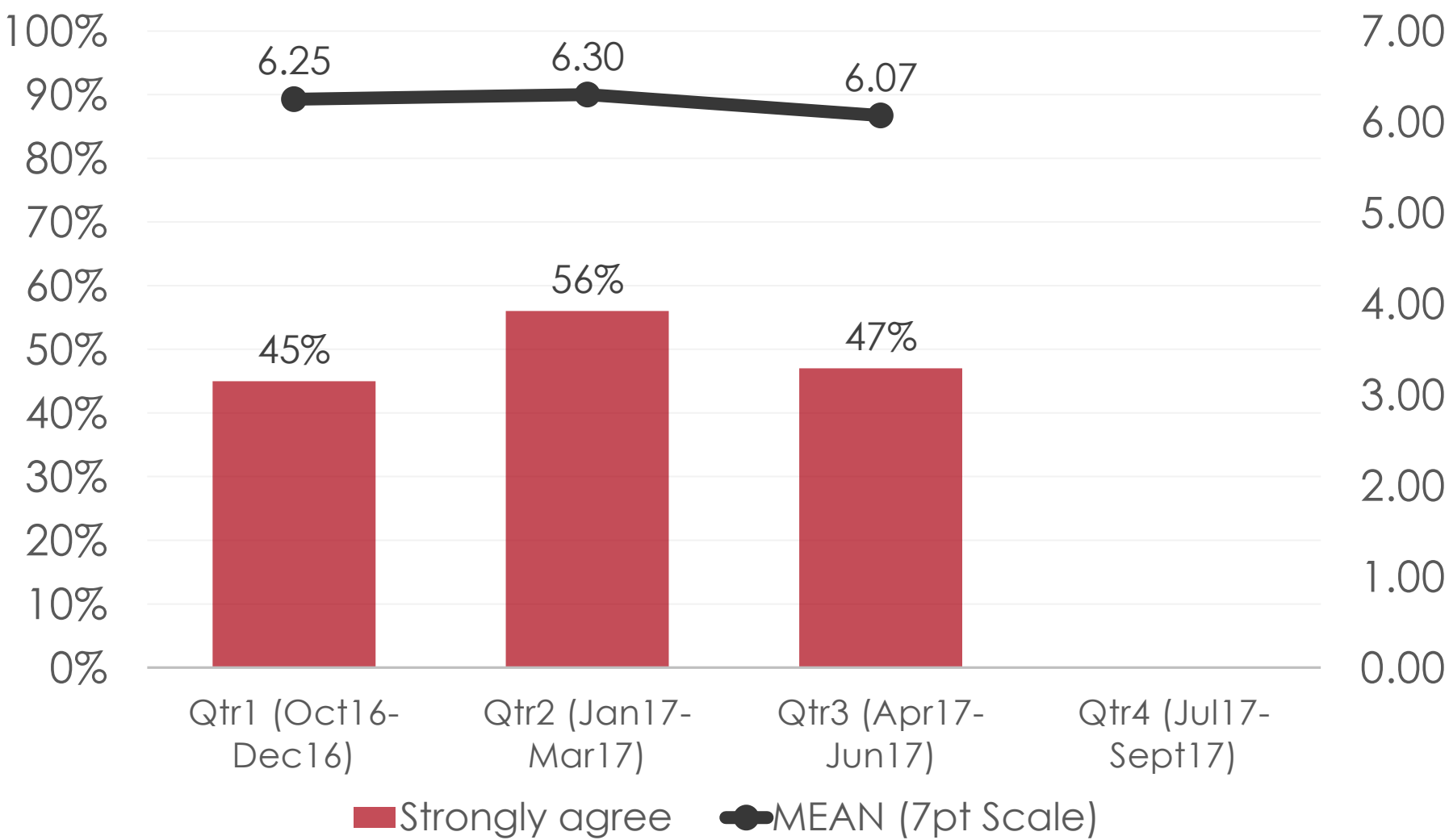
I had no communication problems



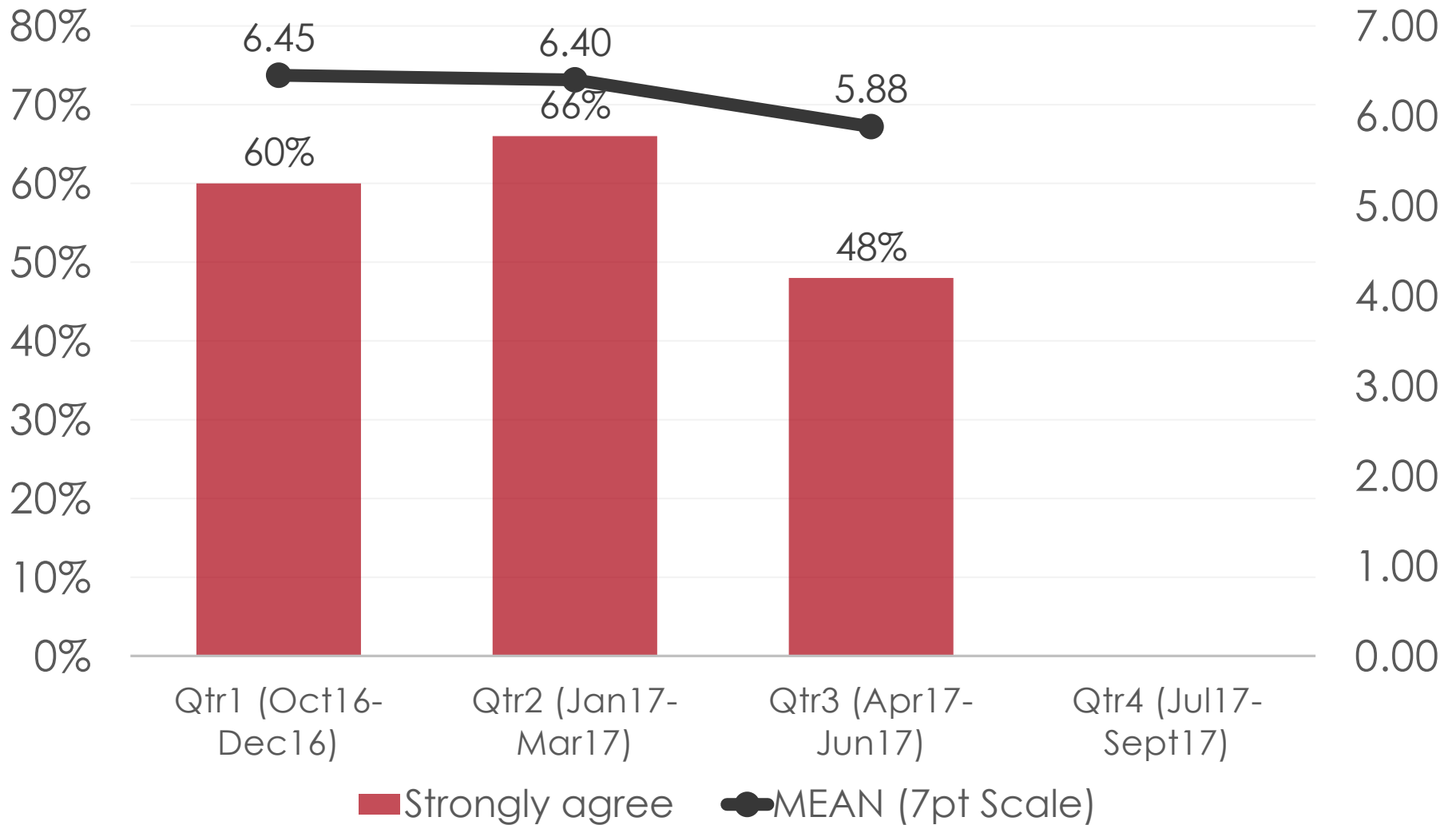
I will recommend Guam to friends



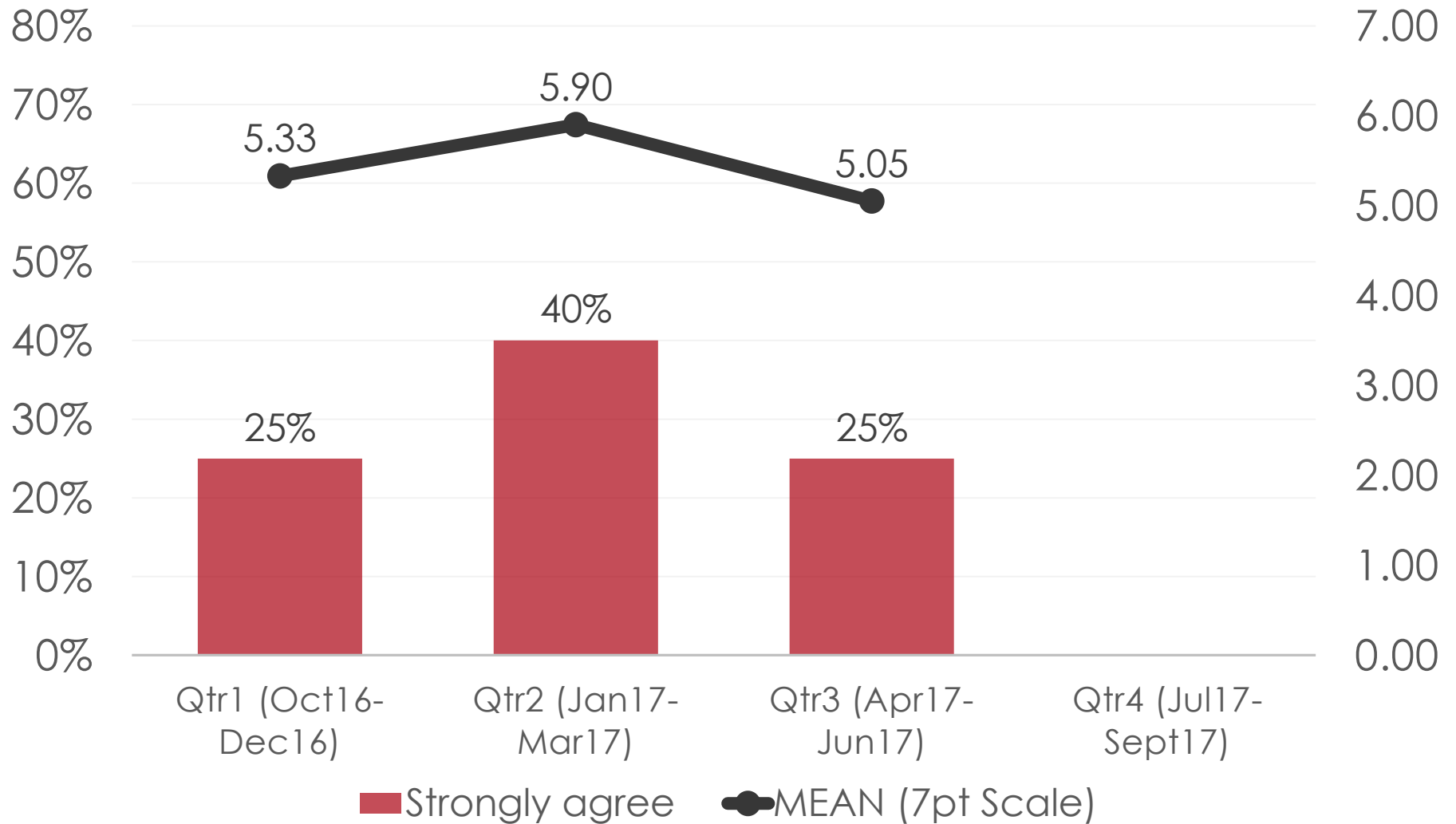
Sites on Guam were attractive



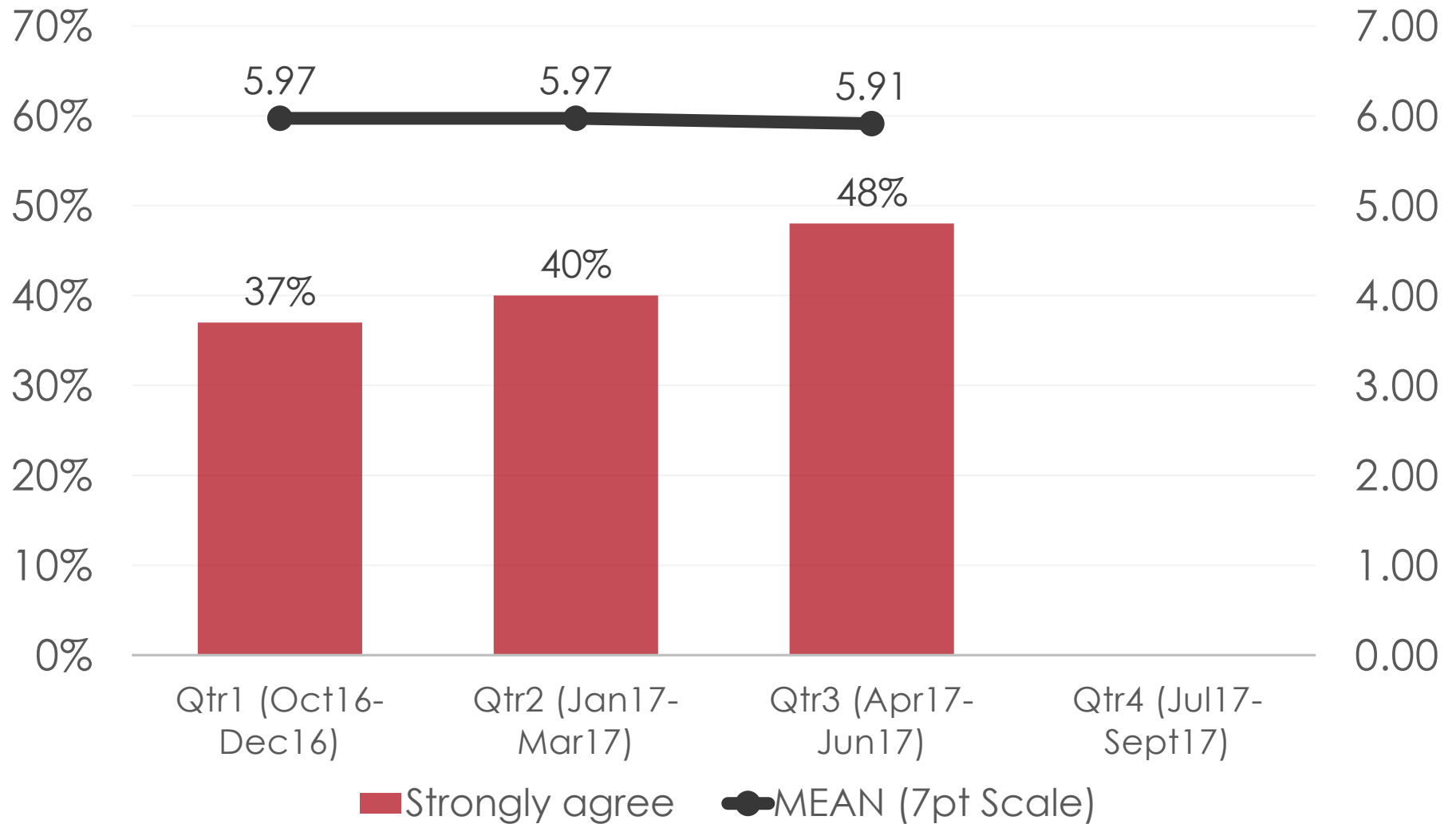
I plan to visit Guam again



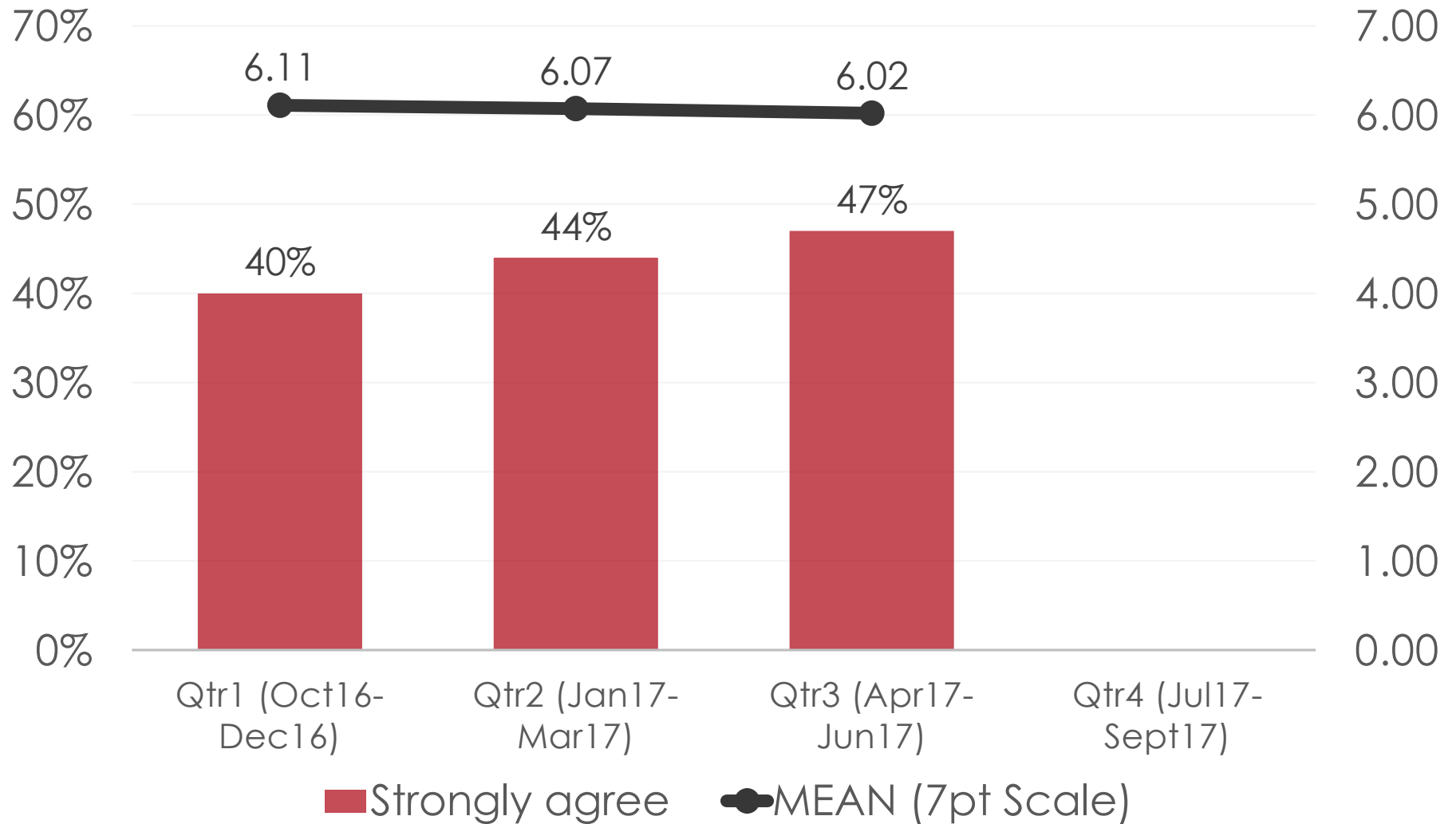
Not enough night time activities



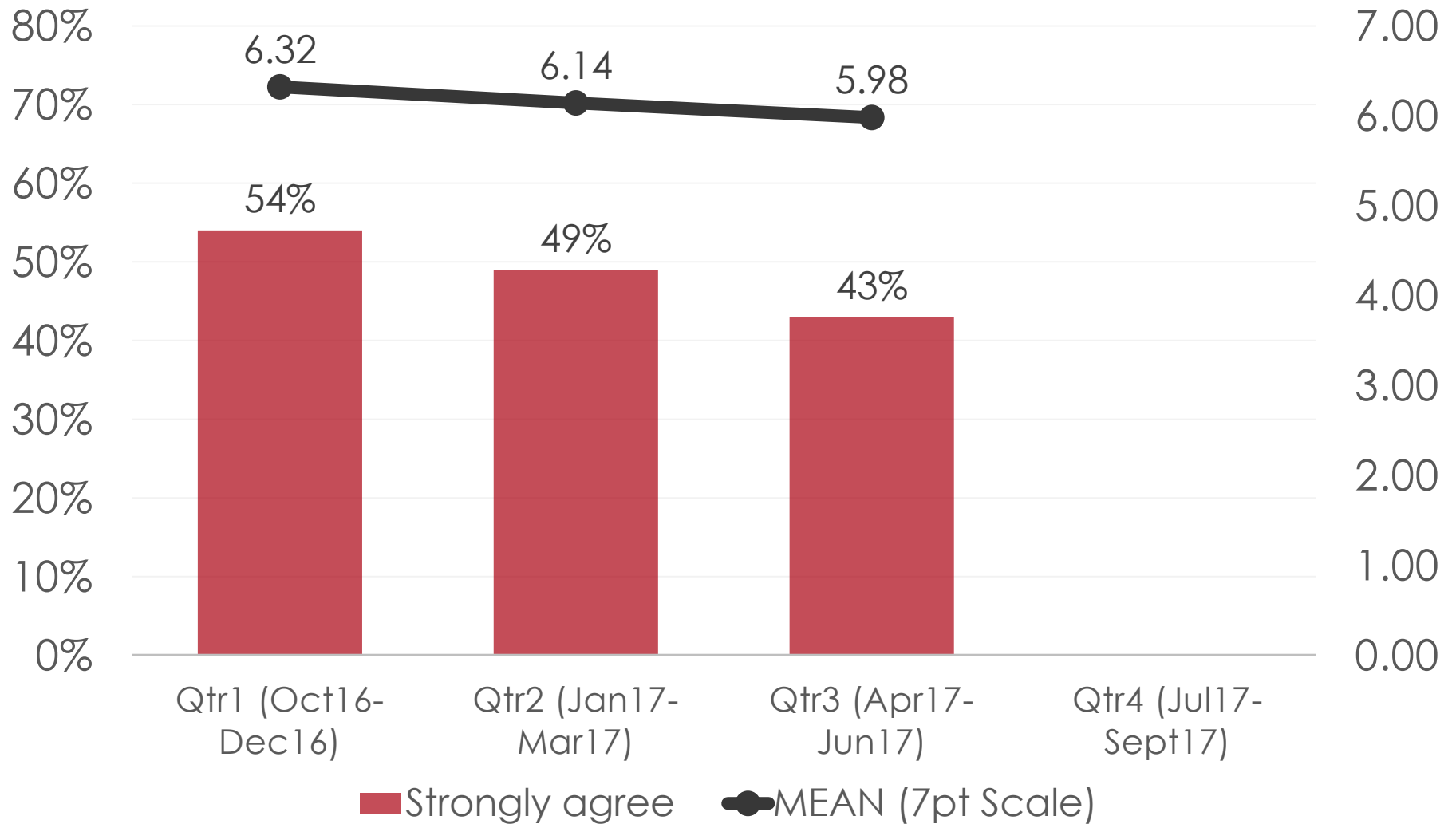
Tour guides were professional



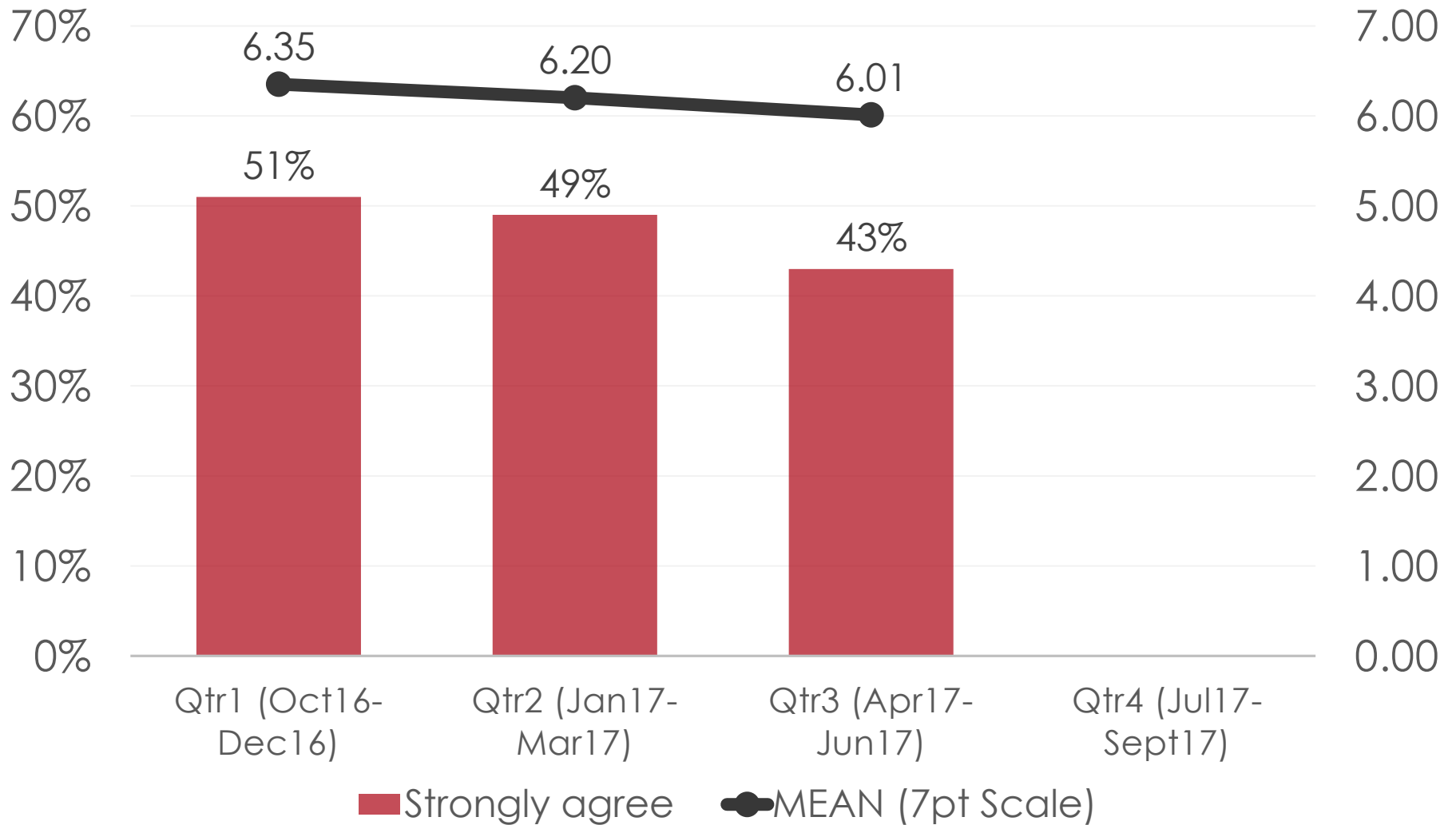
Tour drivers were professional



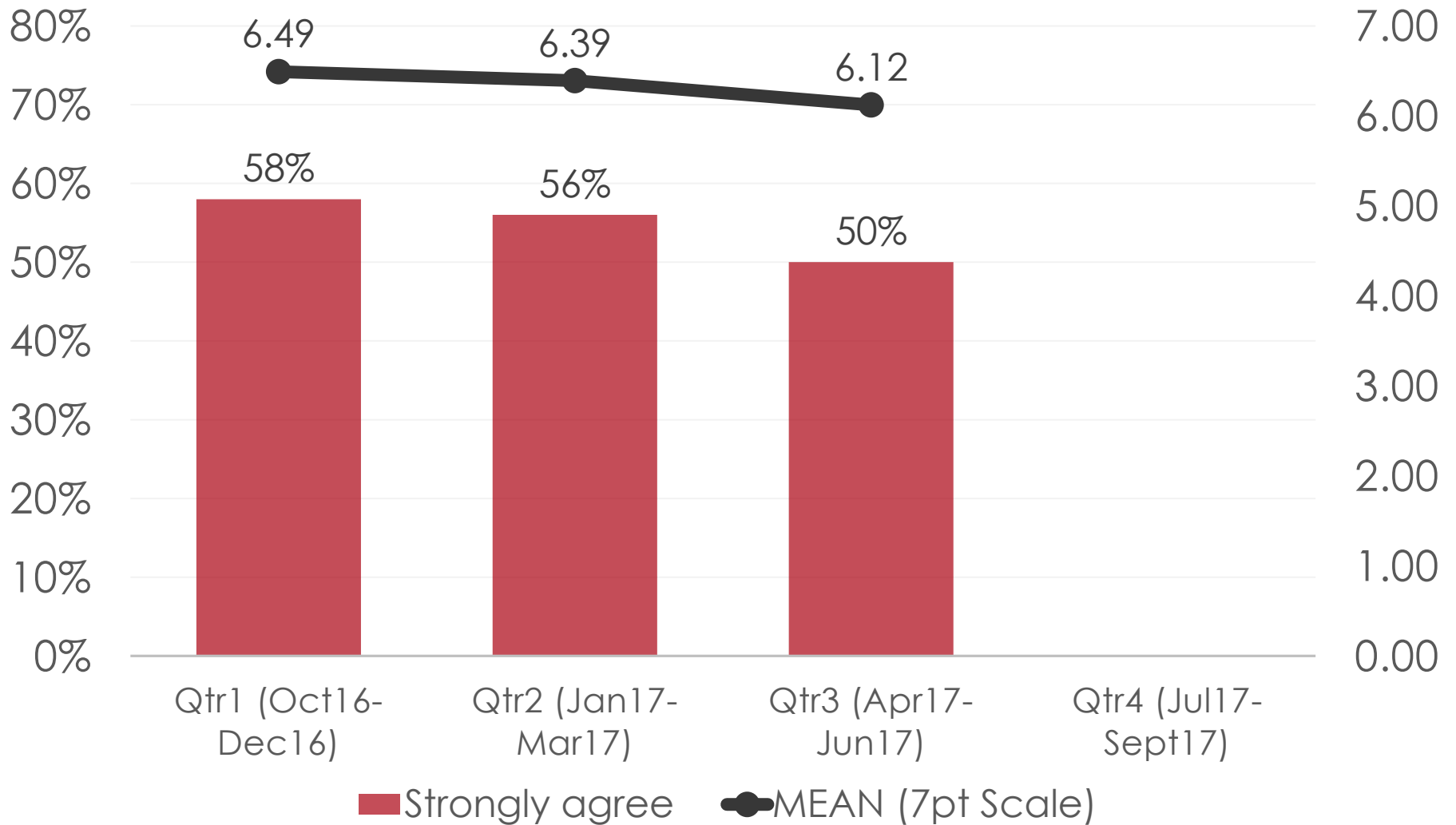
Taxi drivers were professional



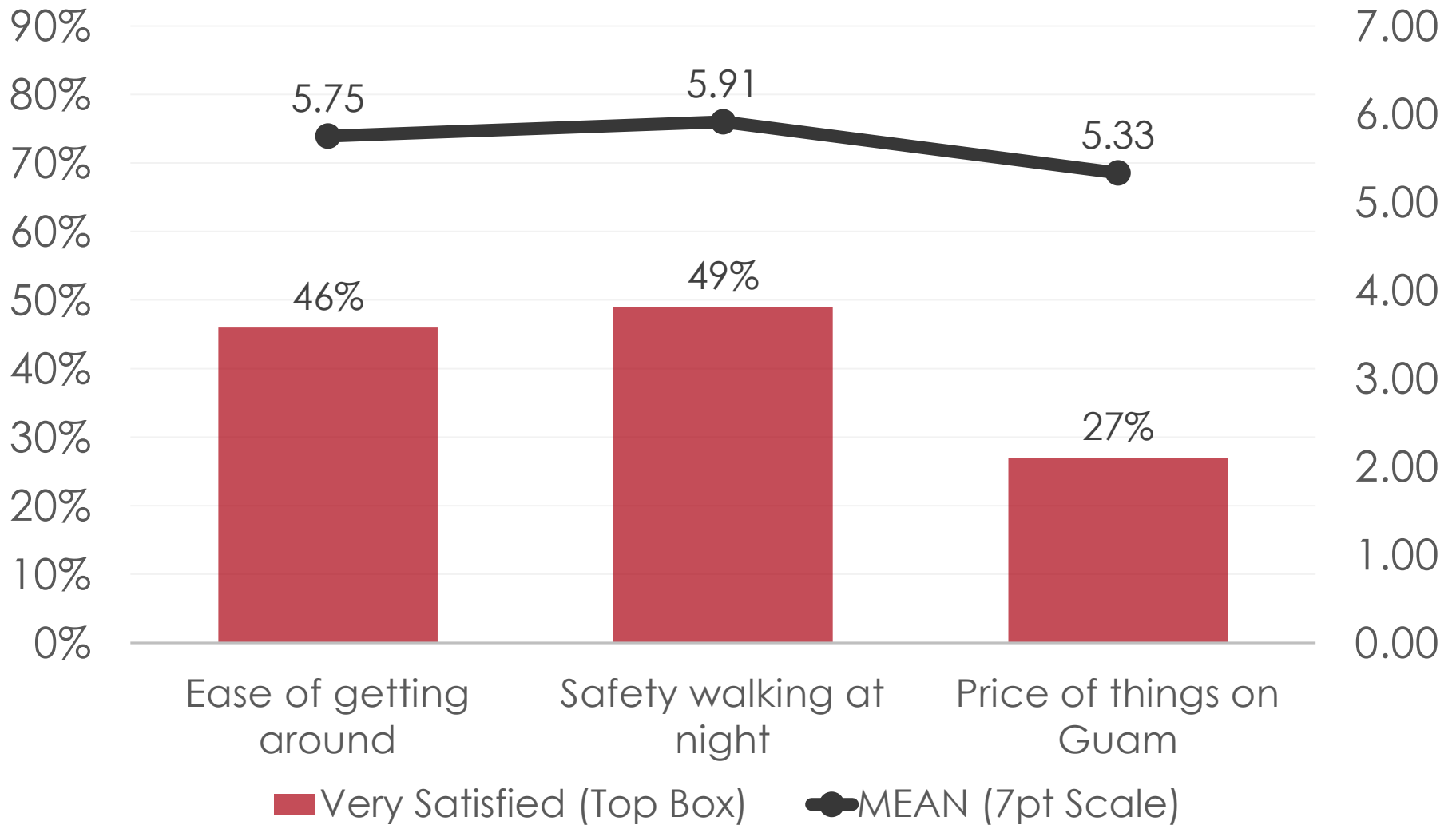
Taxis were clean



Guam airport was clean

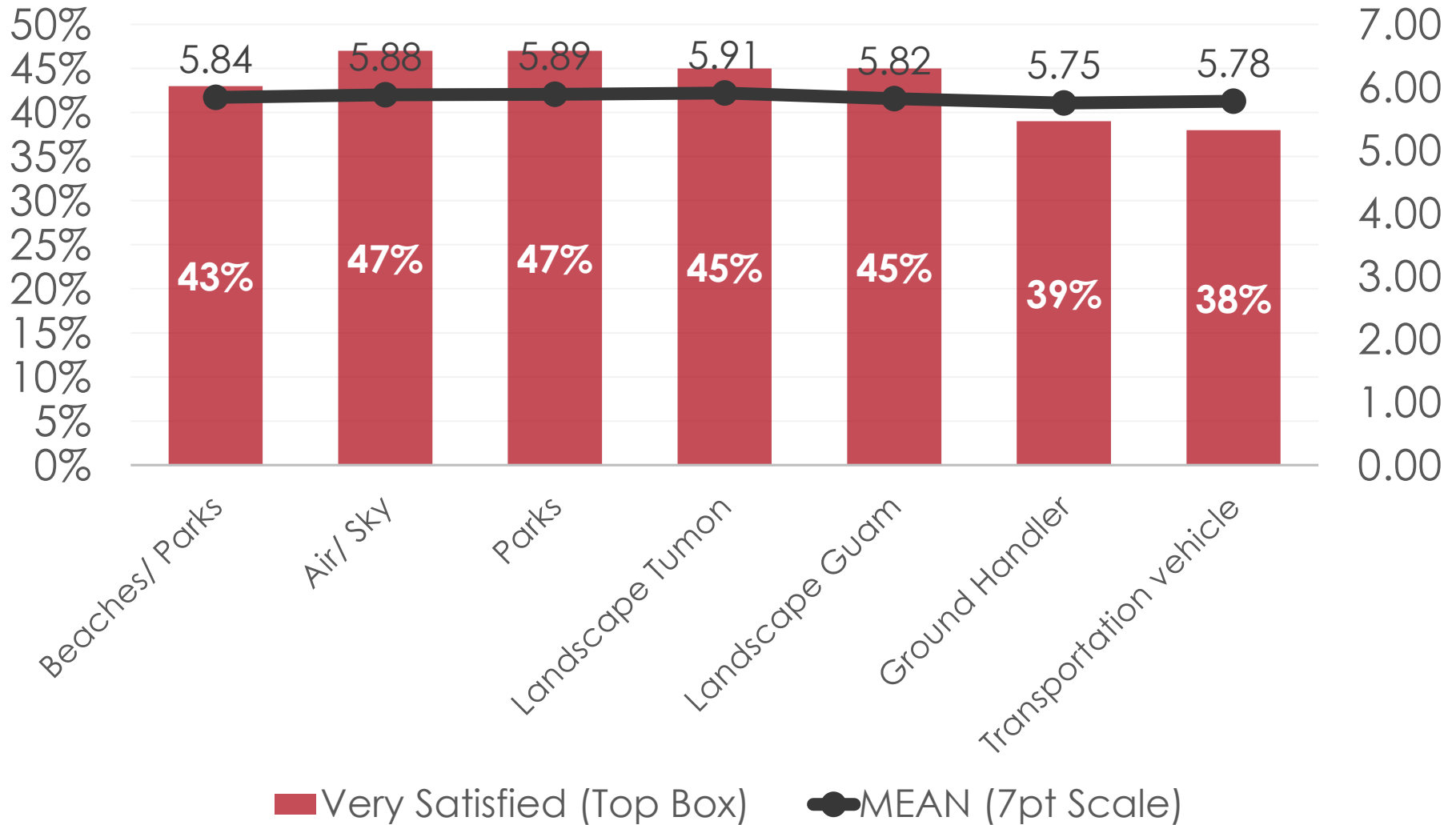


GENERAL SATISFACTION

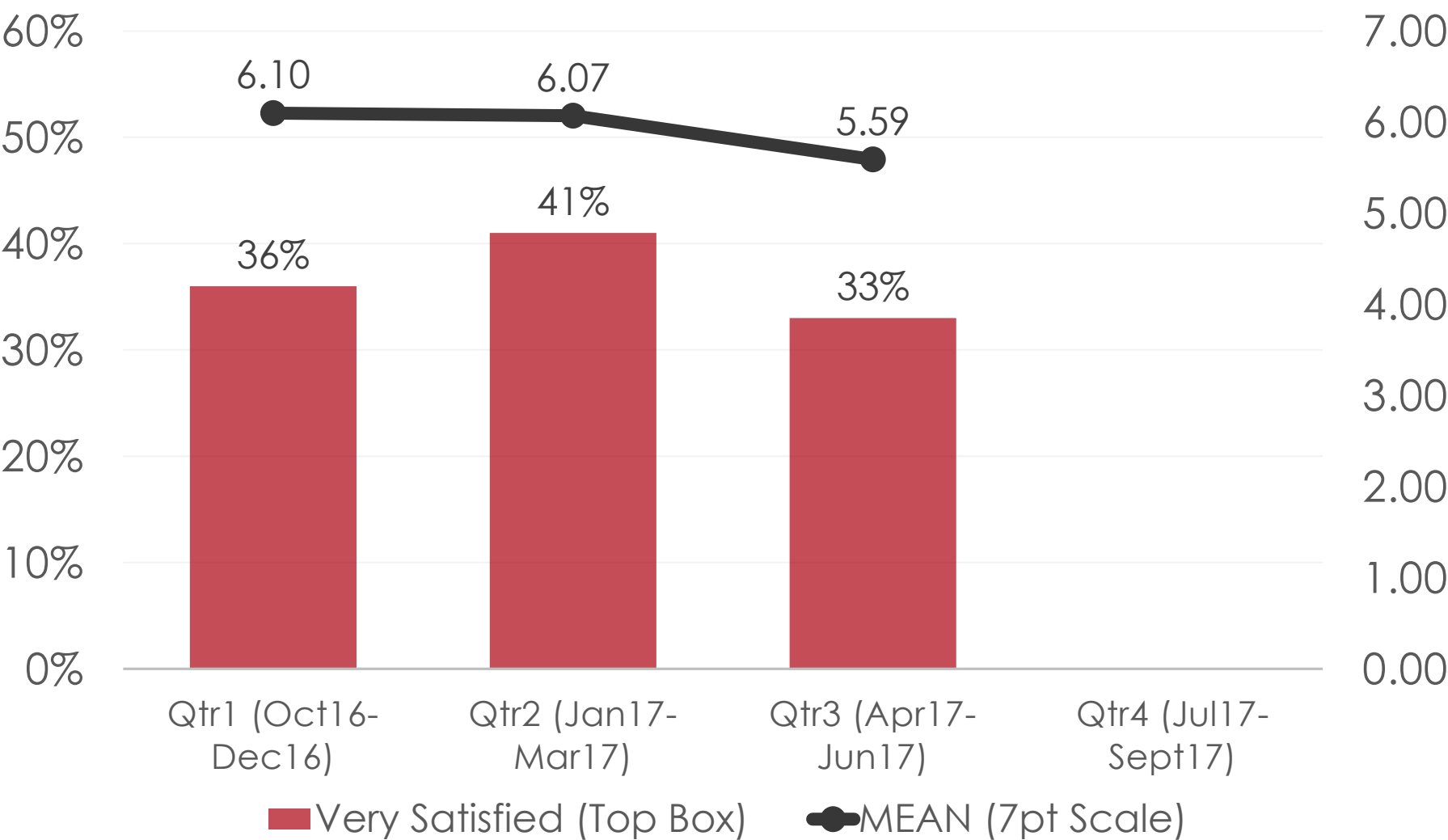


GENERAL SATISFACTION –

Quality/ Cleanliness

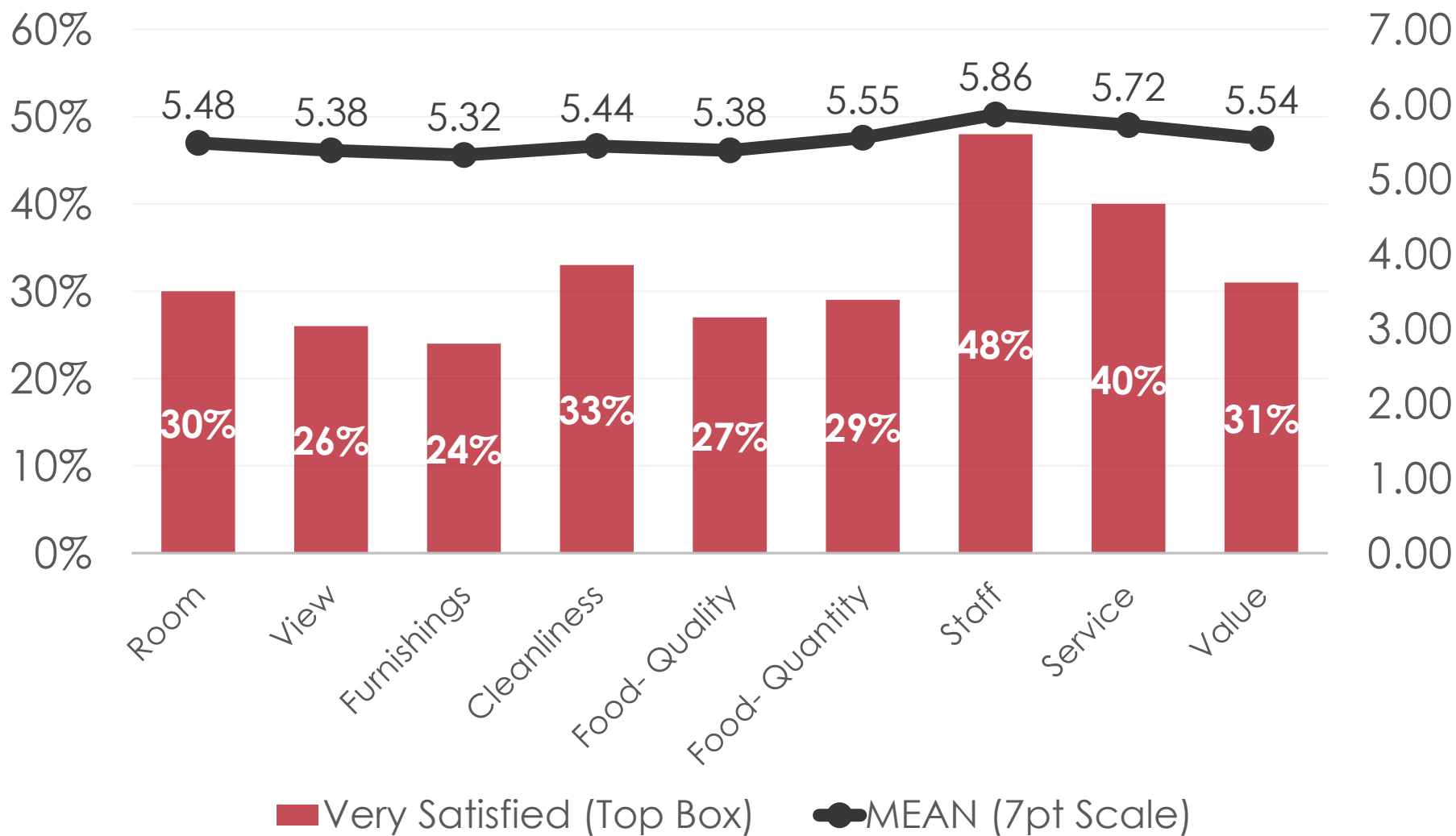


ACCOMMODATIONS – OVERALL SATISFACTION

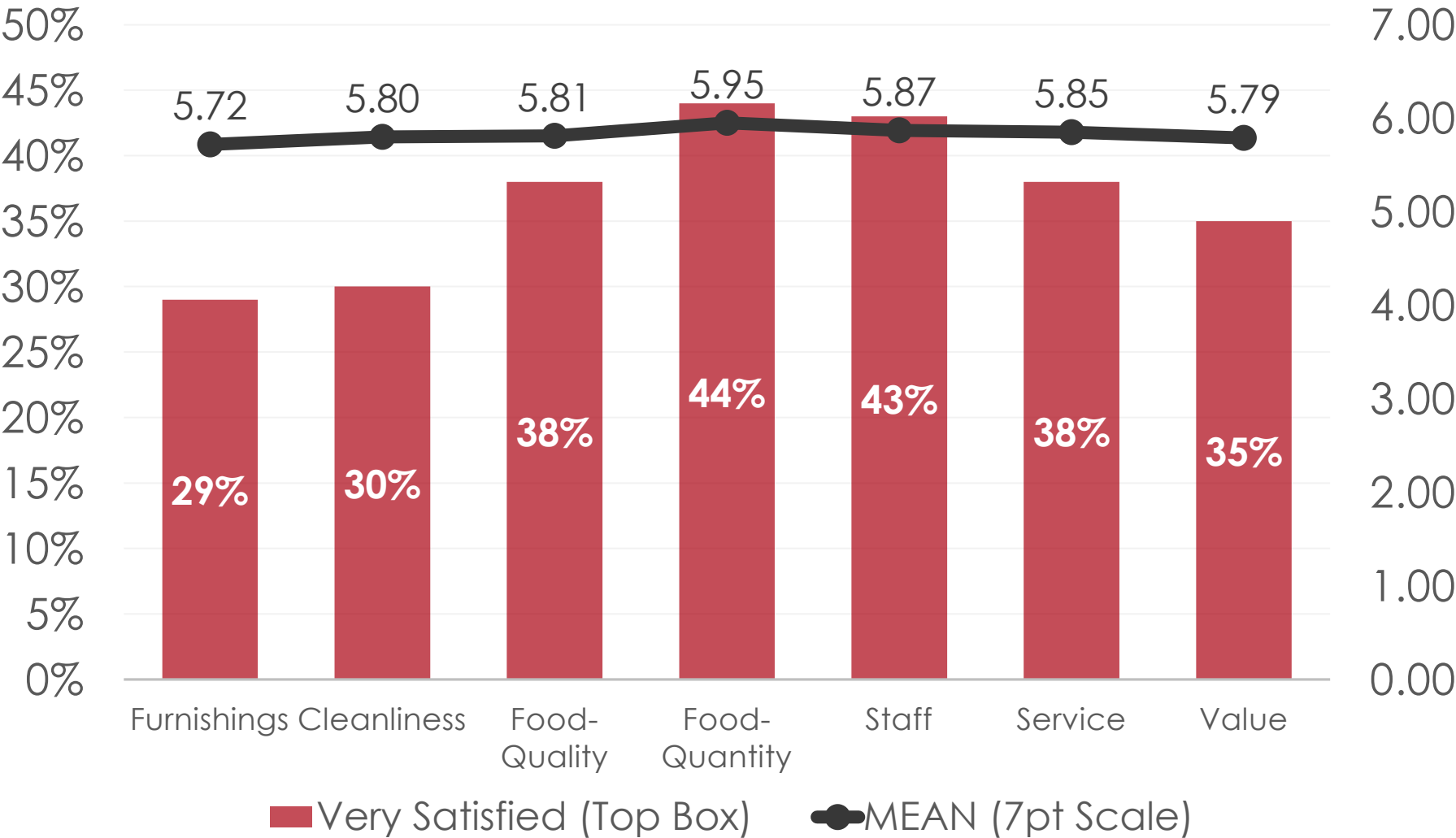


ACCOMMODATIONS –

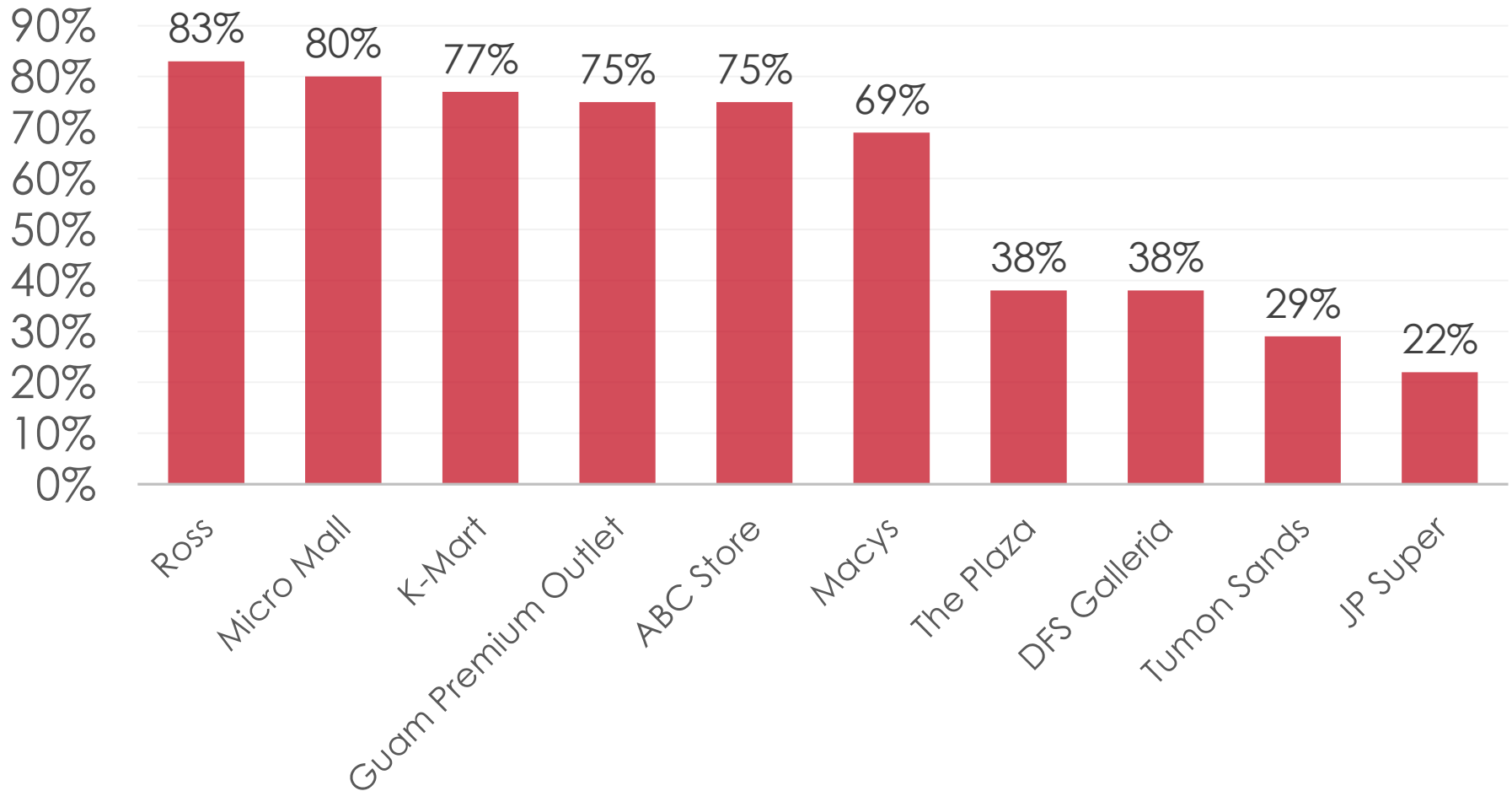
Satisfaction by Category



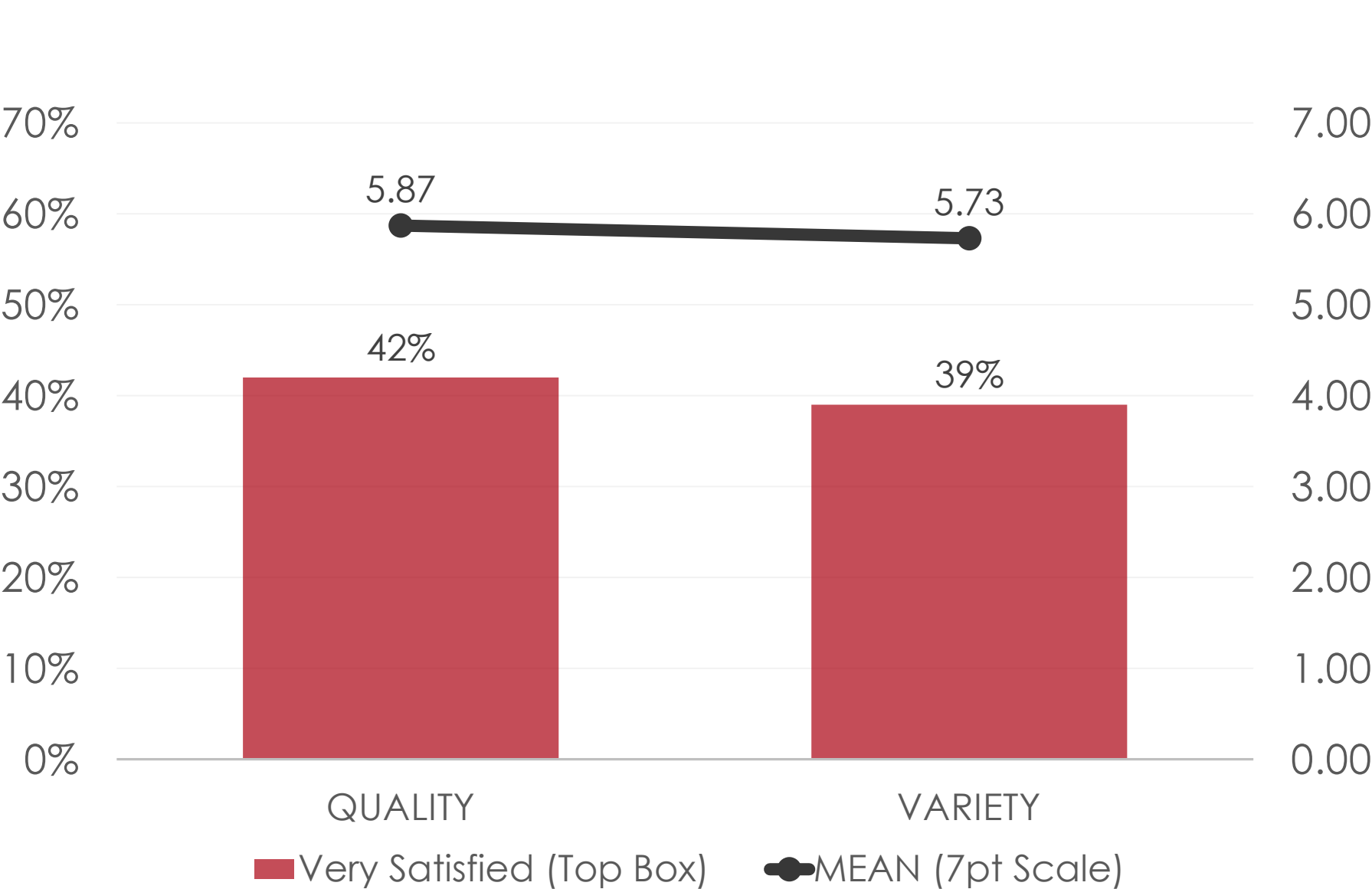
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



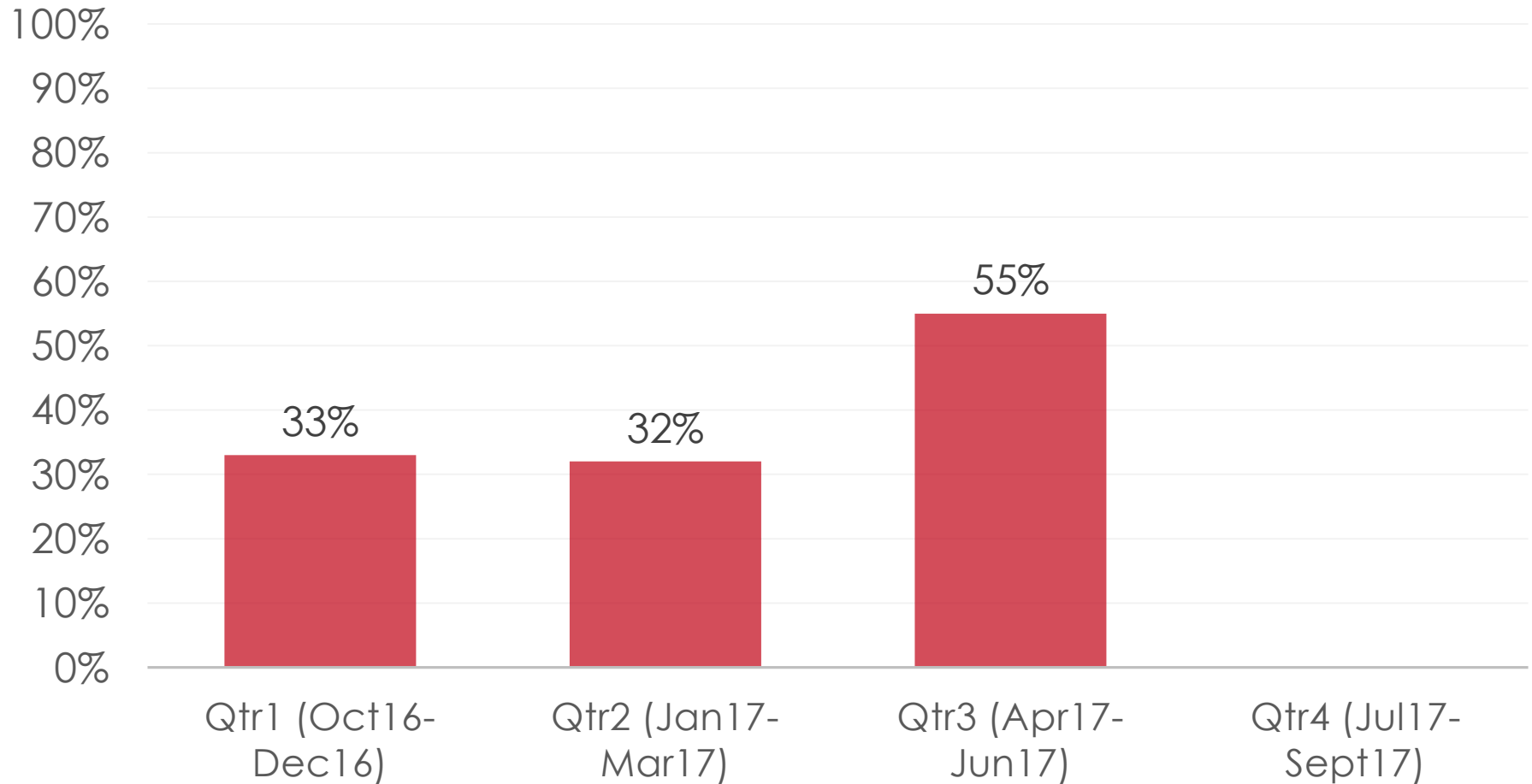
Shopping Malls/ Stores (Top Responses)



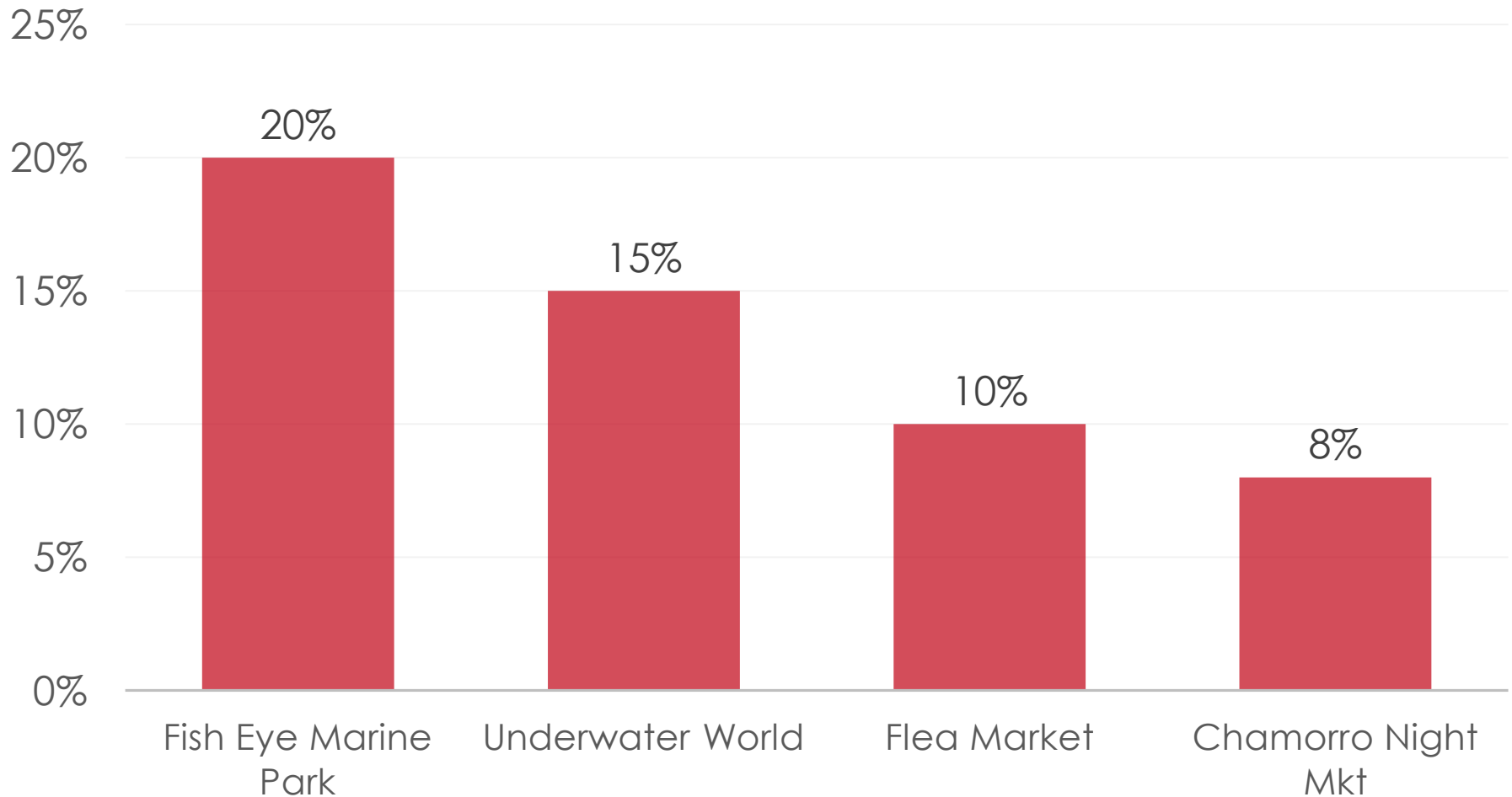
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

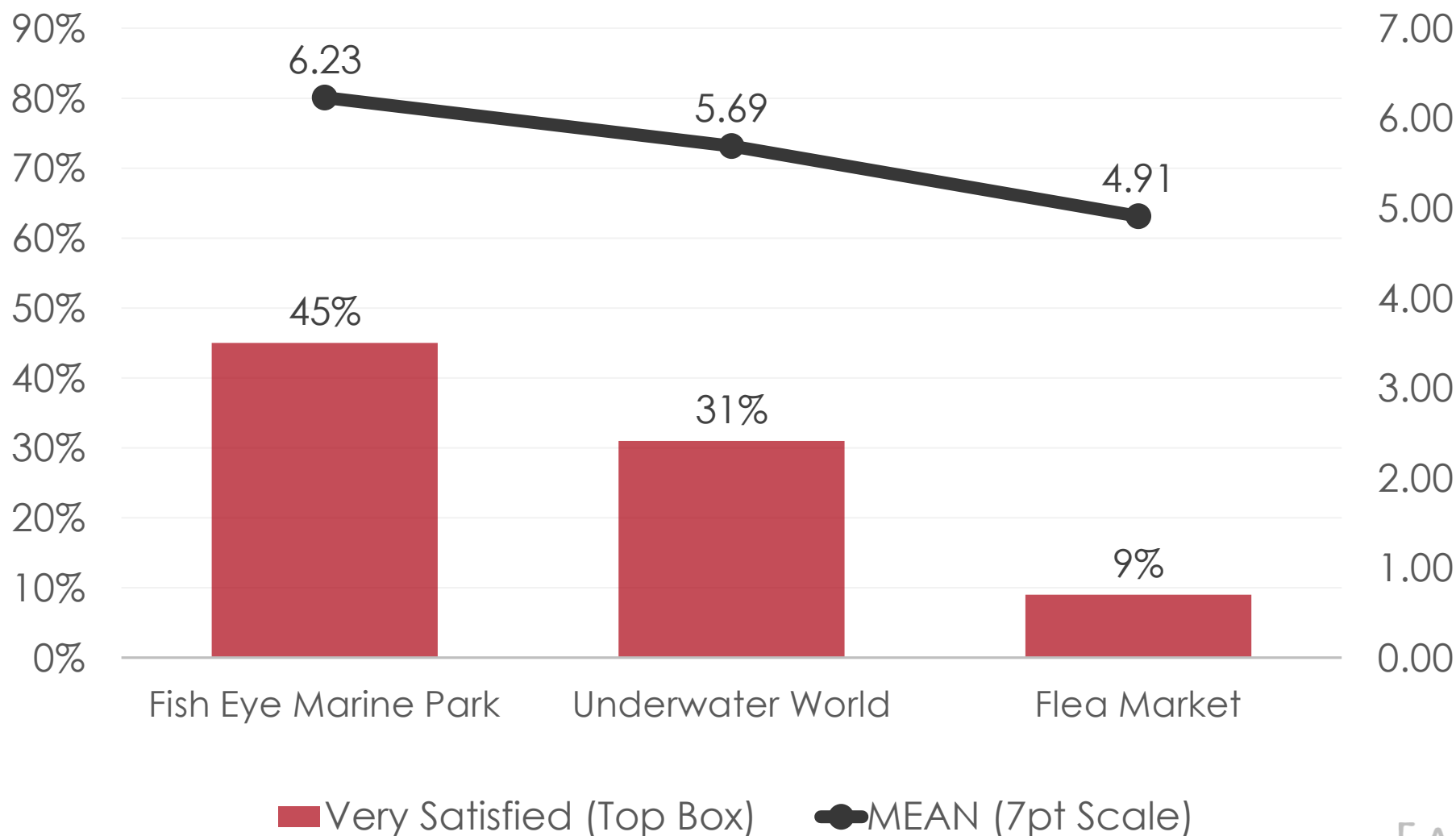


Optional Tour Participation (Top Responses)

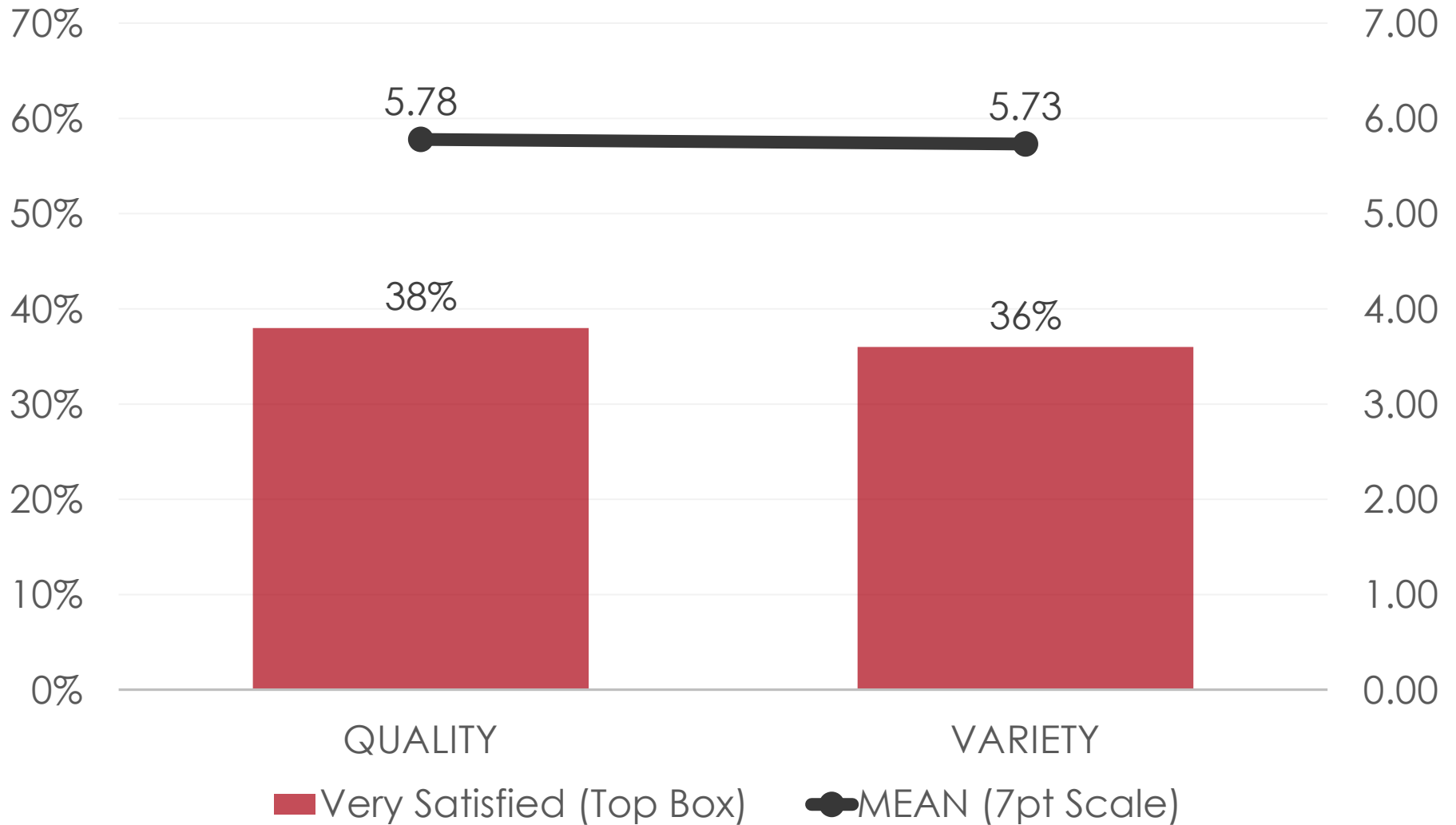


Optional Tour Satisfaction

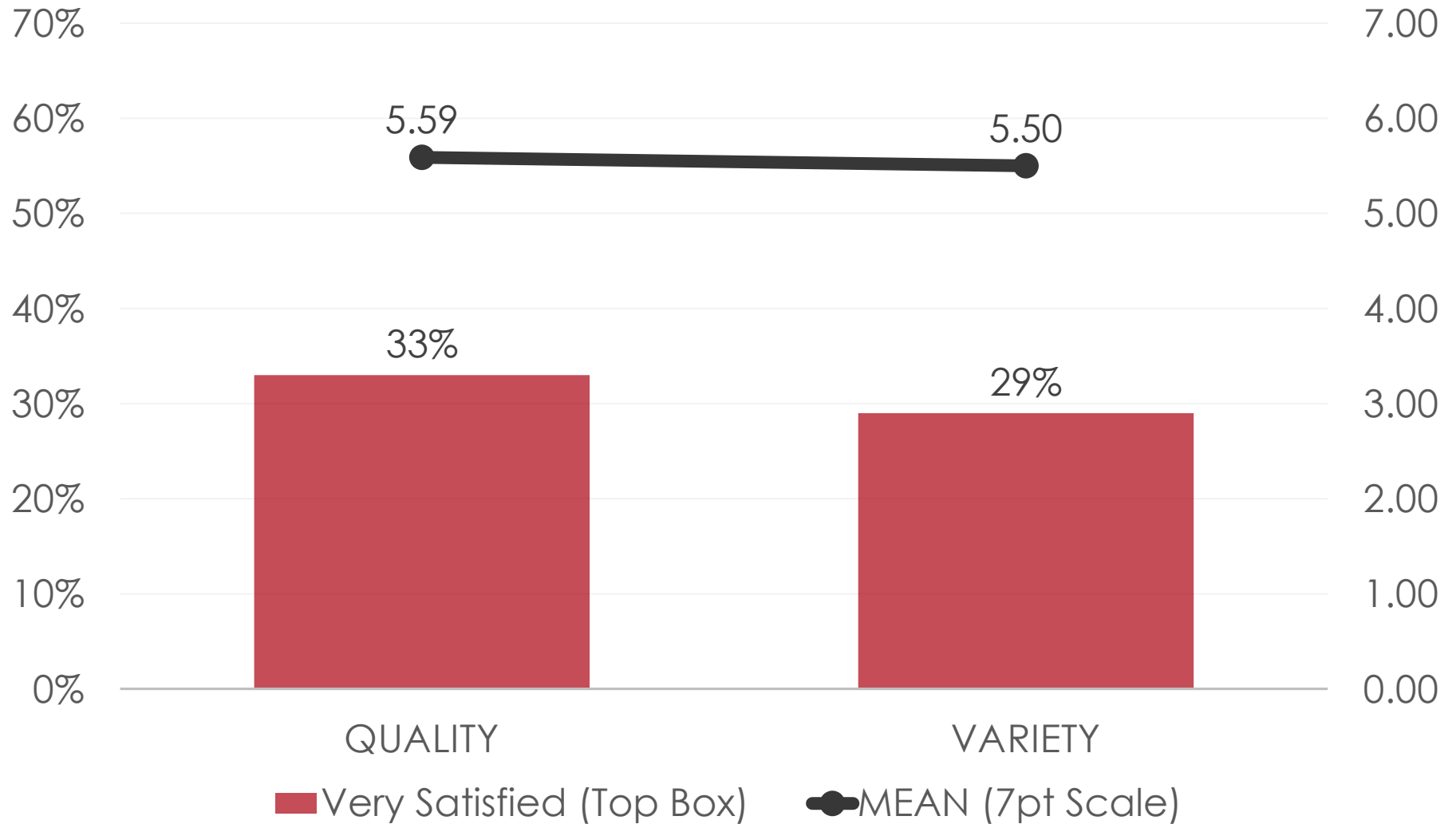
Top Responses only - Participation (10%+)



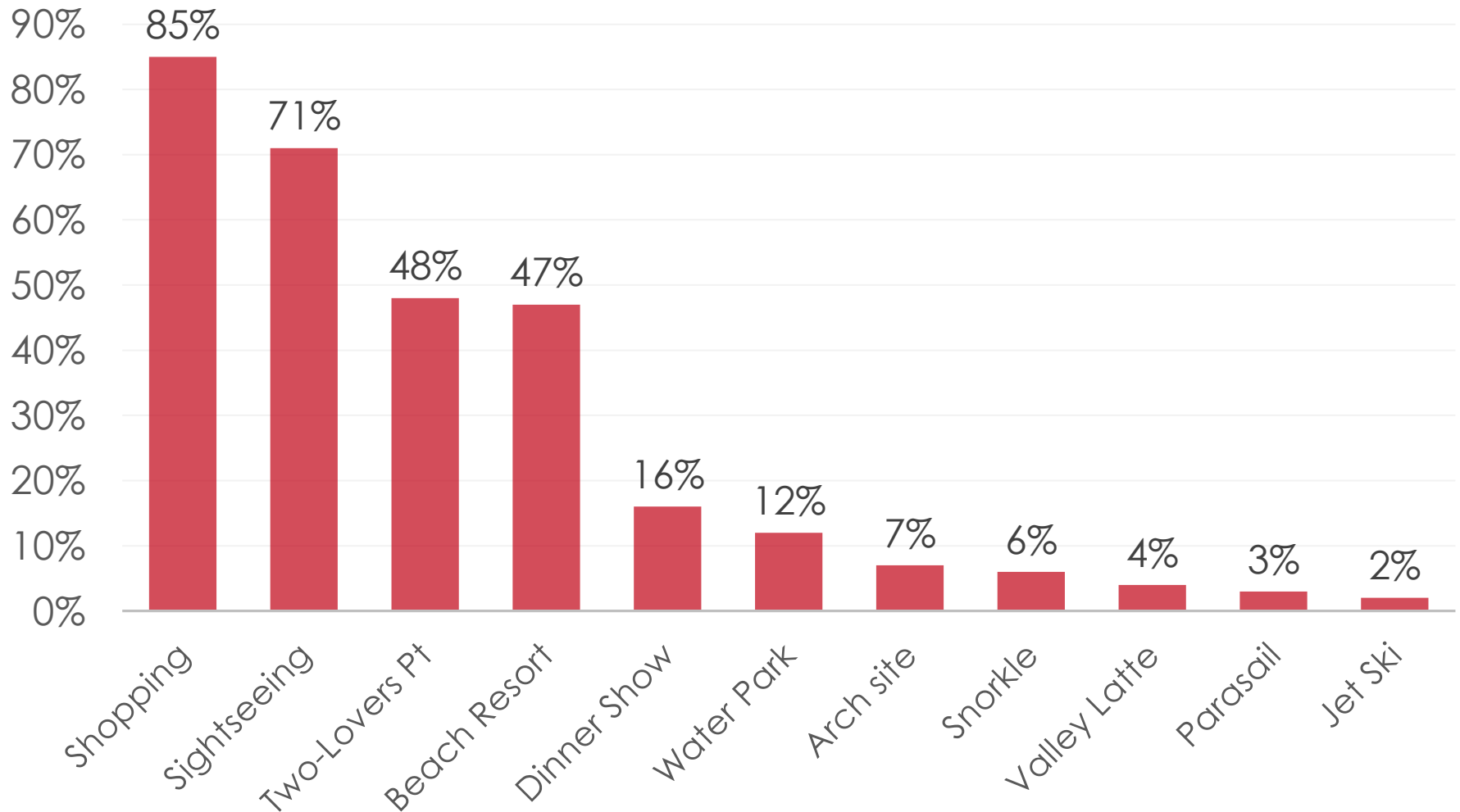
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION



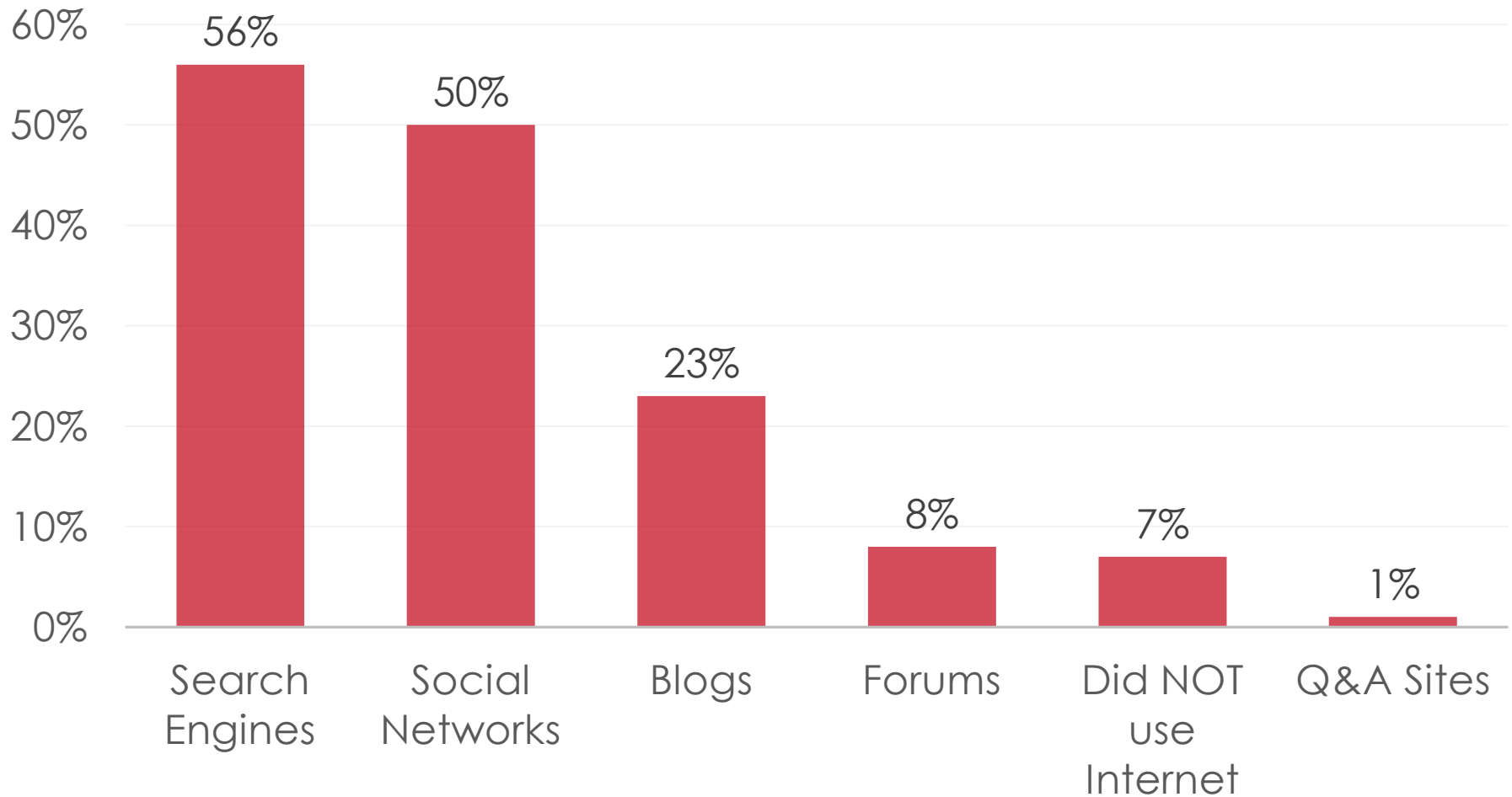
Activities Participation (Top Responses)



SECTION 5

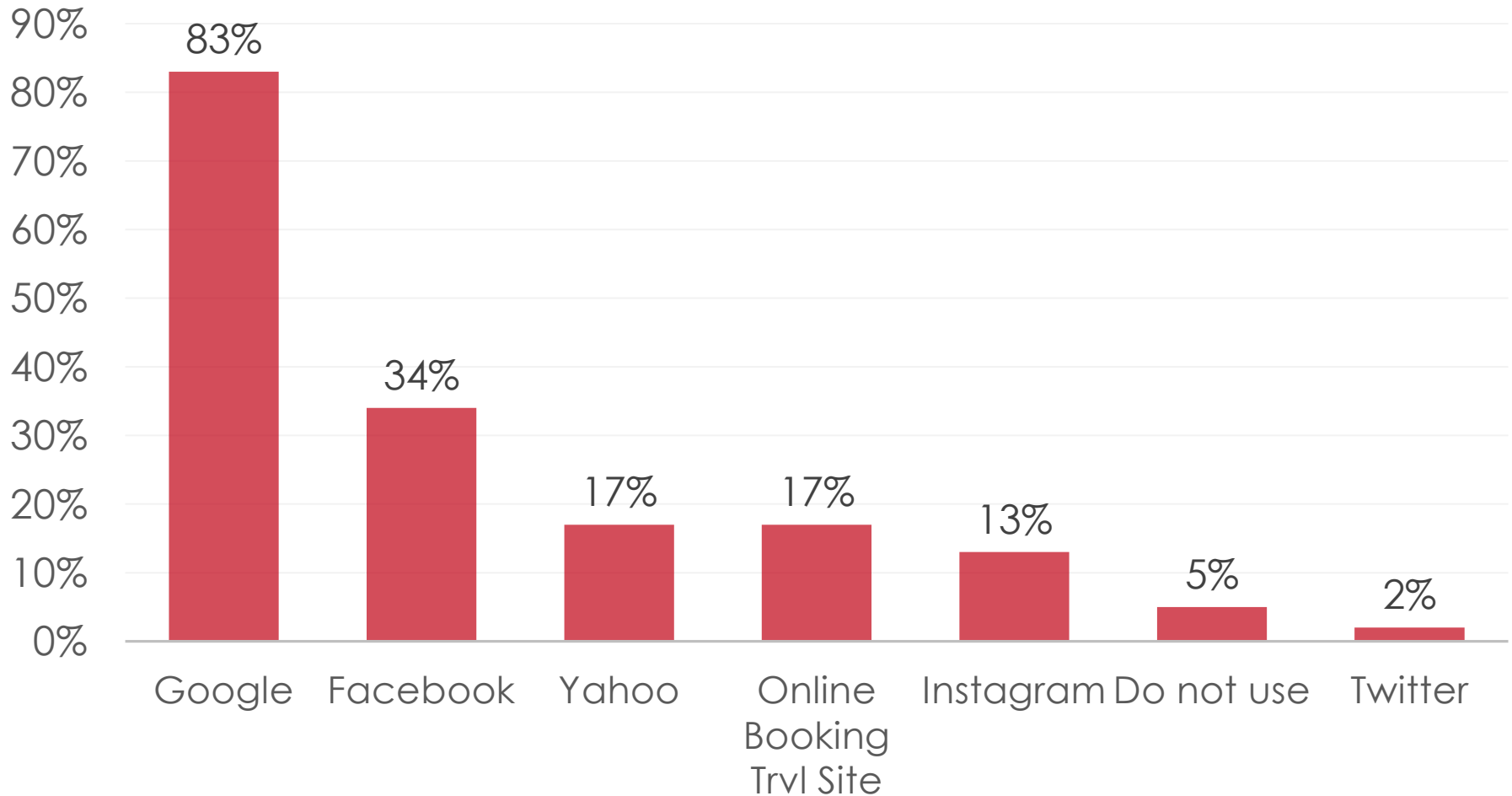
PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



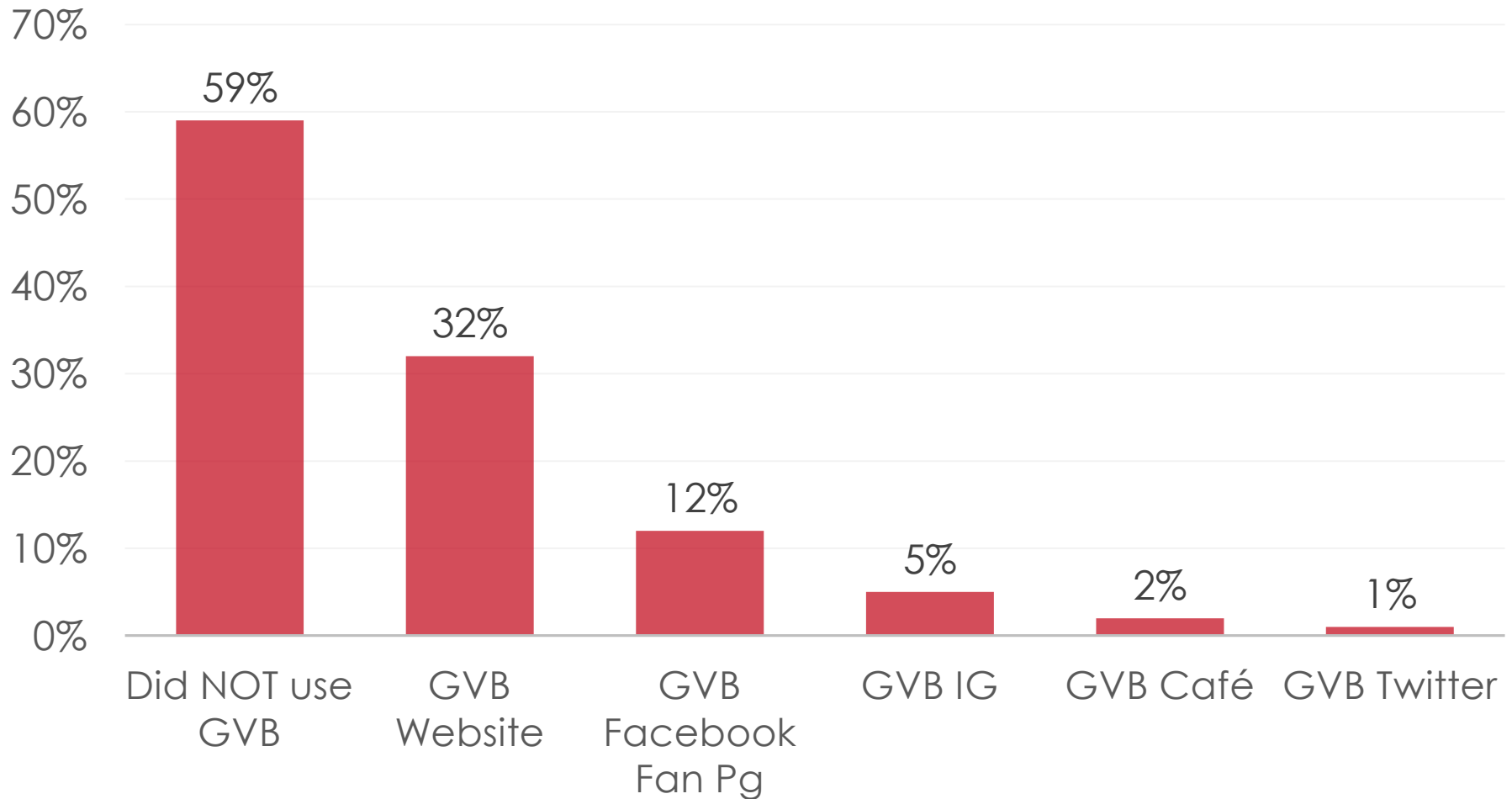
INTERNET- SOURCES OF INFORMATION

Things to do on Guam

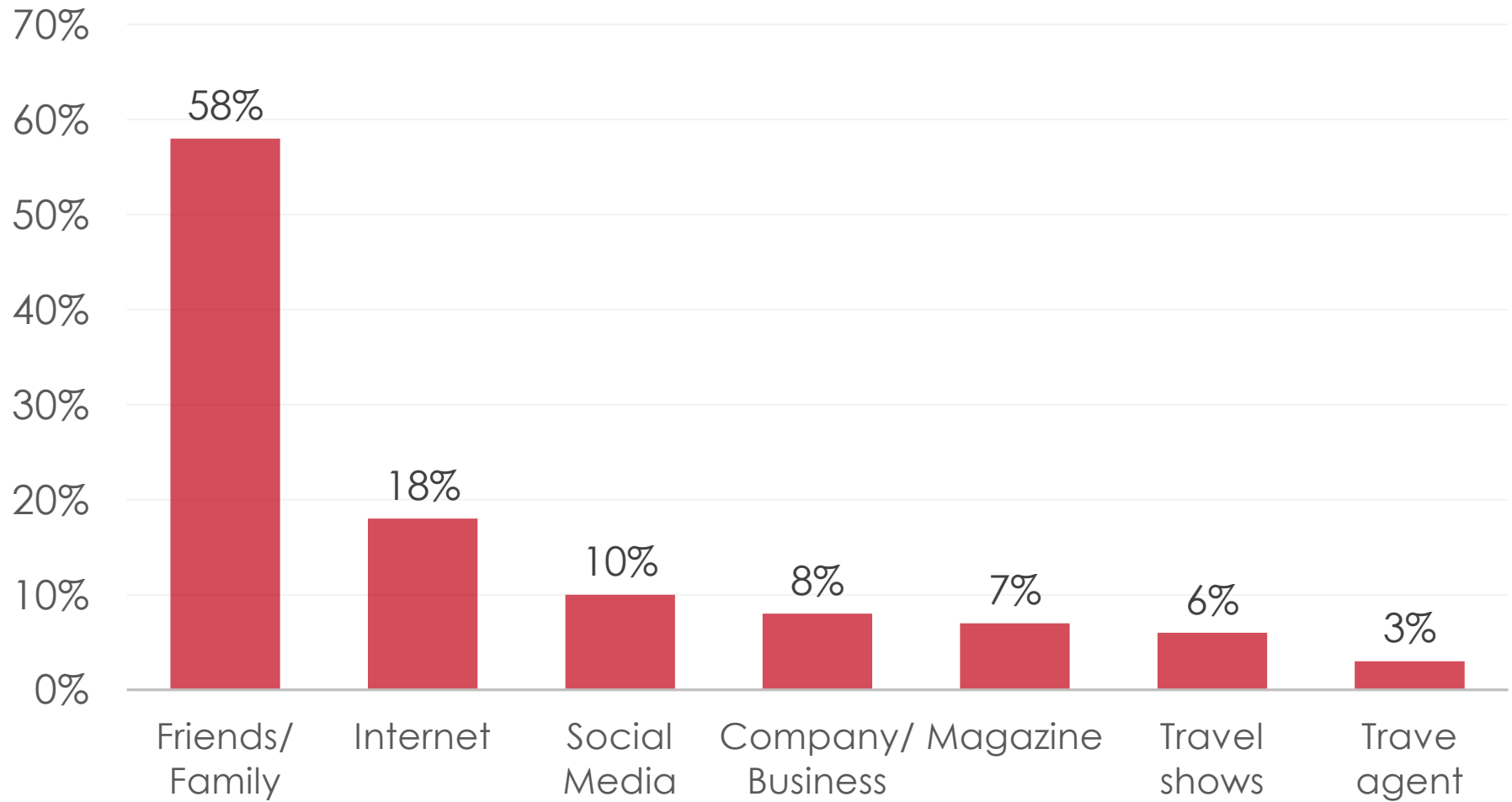


INTERNET- SOURCES OF INFORMATION

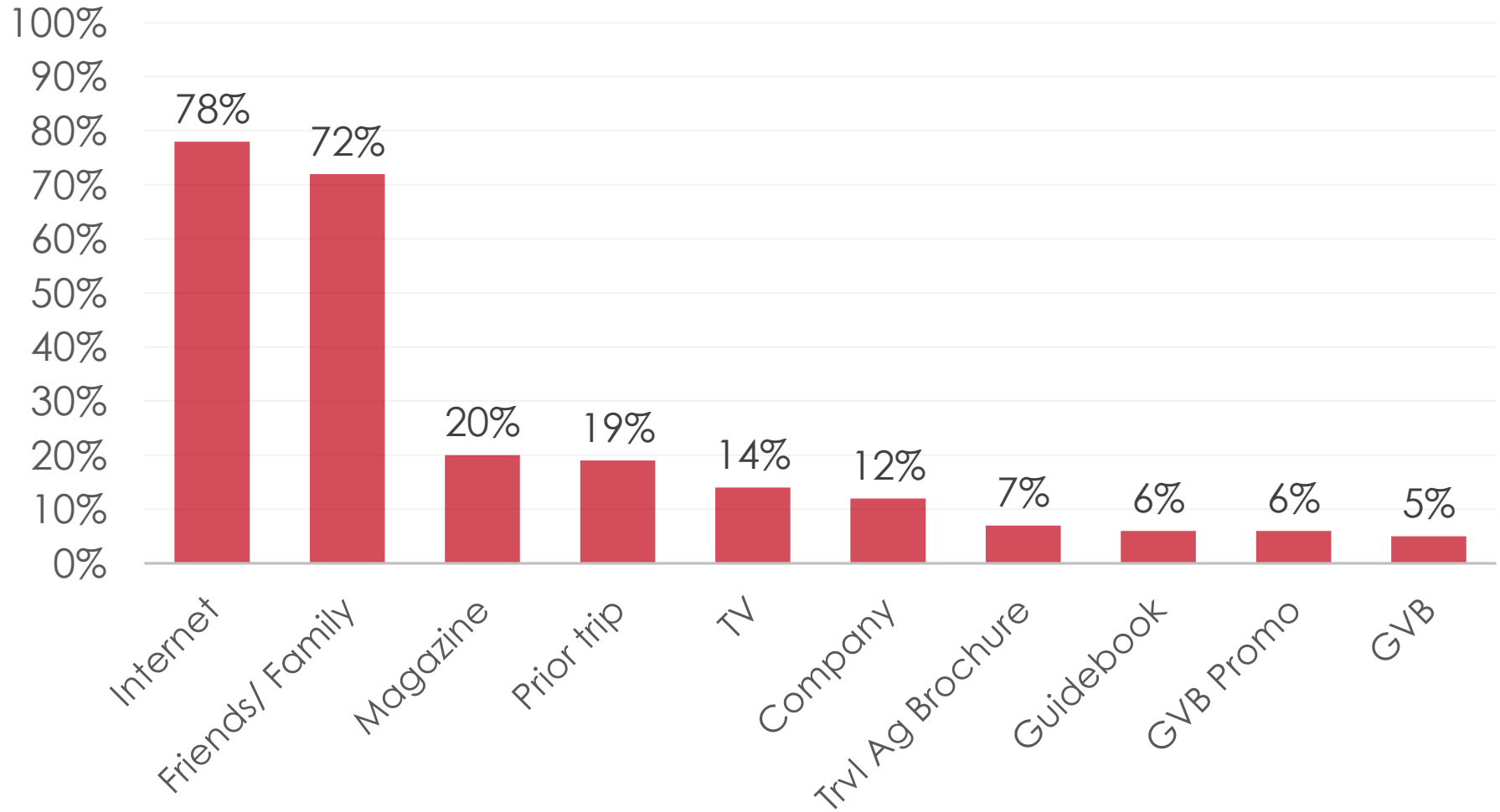
GVB



TRAVEL MOTIVATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

GVB EXIT SURVEY

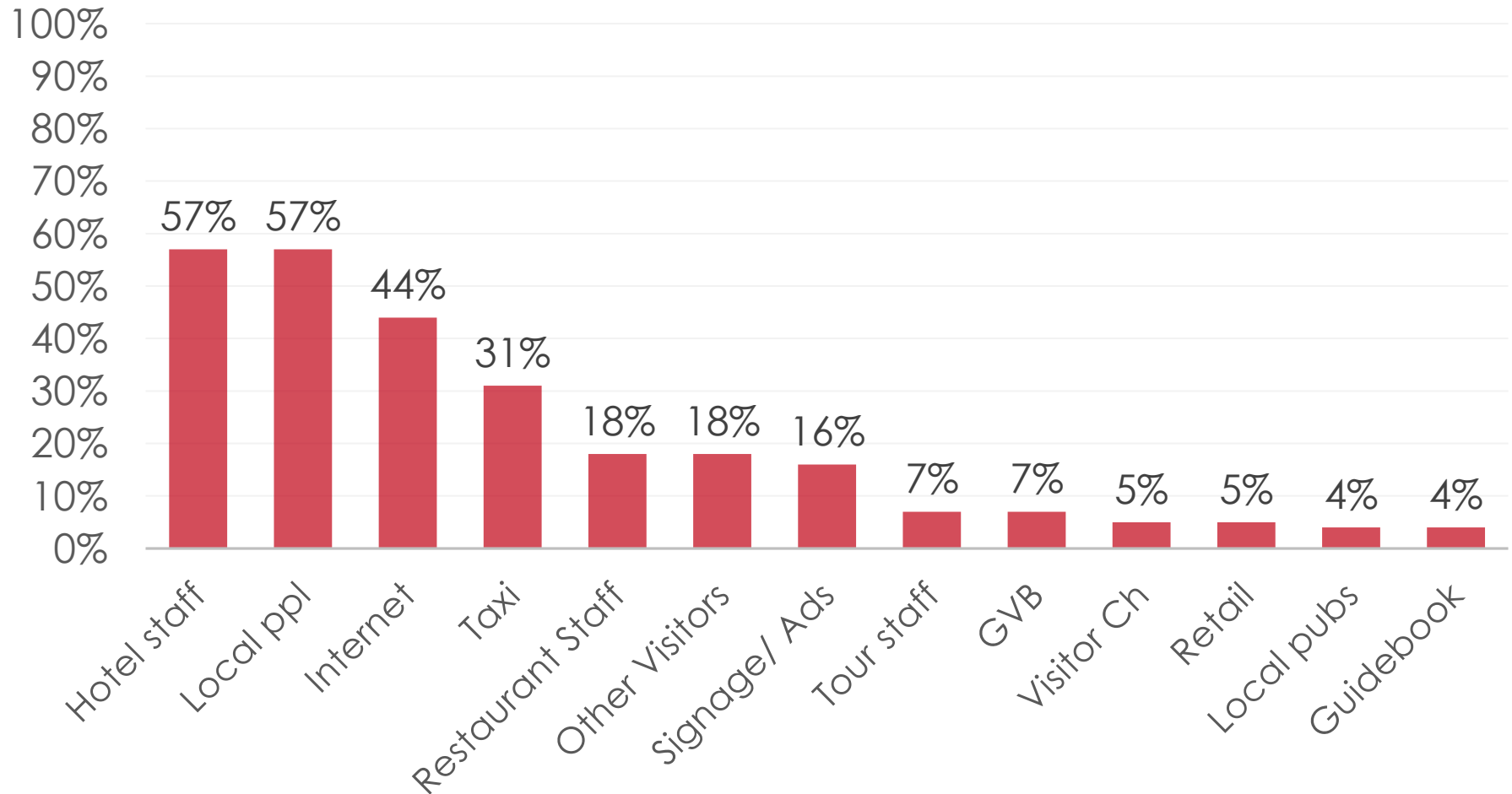
Q1 Please select the top three sources of information you used to find out about Guam before your trip:

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q1	Internet/Mobile App	78%	67%	77%	82%	71%
	Friend or relative	72%	50%	76%	73%	72%
	Magazine (consumer)	20%	17%	18%	14%	22%
	I have been to Guam before	19%	33%	22%	21%	20%
	TV	14%	17%	12%	12%	14%
	Co-worker/ company travel department	12%	33%	11%	13%	12%
	Newspaper	9%	17%	10%	7%	13%
	Travel agent brochure	7%	17%	6%	7%	6%
	Guam Visitors Bureau promotional activities	6%		7%	8%	3%
	Travel guide book at bookstores	6%	17%	5%	7%	1%
	Guam Visitors Bureau office	5%		4%	5%	3%
	Travel trade shows	3%		4%	3%	4%
	Consumer travel shows	3%		2%	1%	3%
	Total	108	6	83	92	69

Prepared by Anthology Research

ONISLE

SOURCES OF INFORMATION



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:

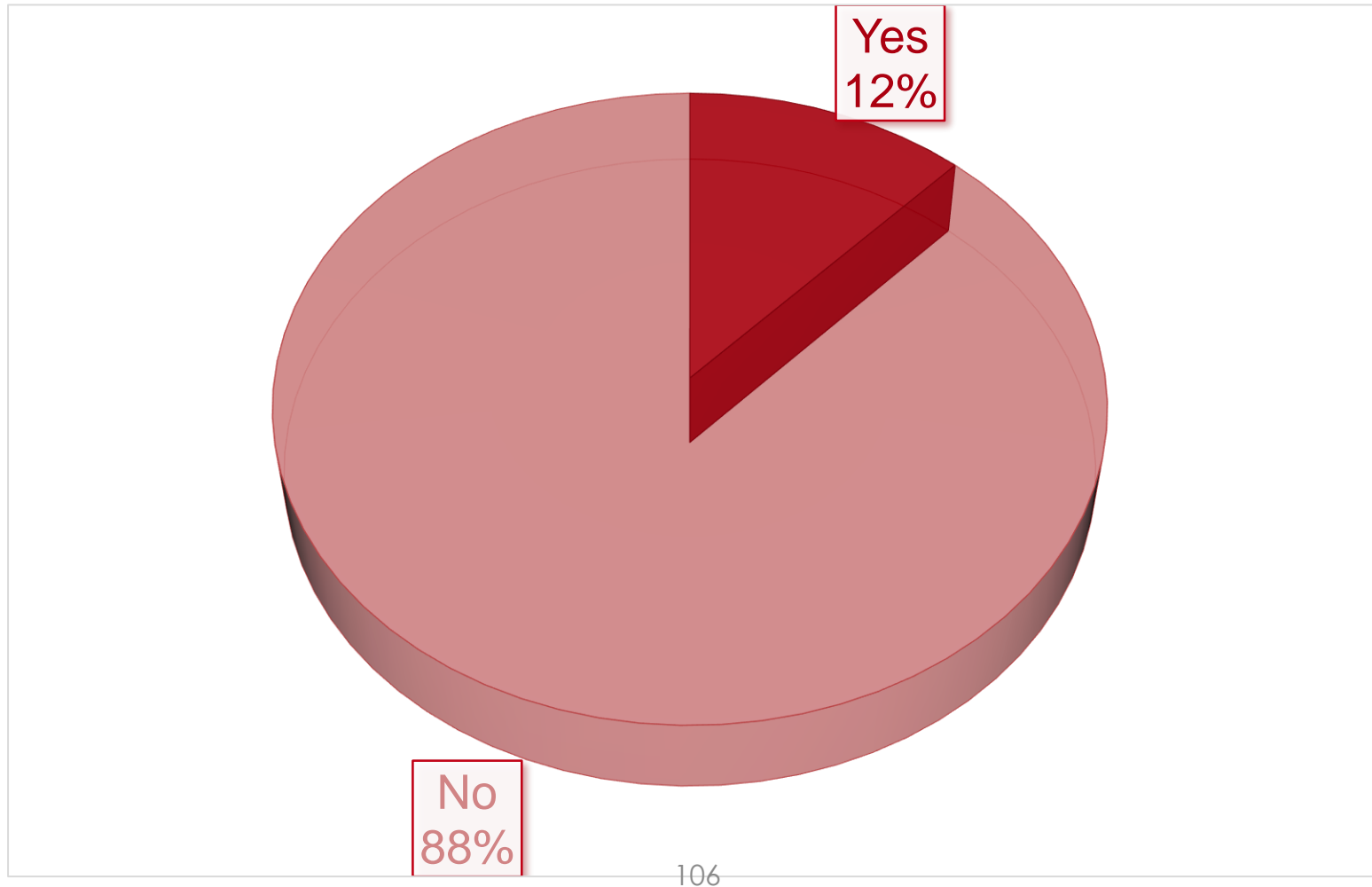
		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q2	Hotel staff	57%	33%	60%	58%	59%
	Local people	57%	67%	54%	55%	51%
	Internet/Mobile App	44%	17%	48%	43%	43%
	Taxi drivers	31%	17%	34%	30%	37%
	Restaurant staff (outside hotel)	18%		17%	20%	24%
	Other visitors	18%	50%	16%	18%	9%
	Signs/ advertisement	16%	50%	14%	14%	16%
	Tour staff	7%		6%	8%	6%
	Guam Visitors Bureau	7%	33%	5%	5%	6%
	Retail staff	5%		5%	5%	4%
	Visitors channel	5%		5%	4%	6%
	Local publication	4%	17%	2%	4%	
	Guide books I brought with me	4%		5%	4%	4%
	Total	107	6	83	92	68

Prepared by Anthology Research

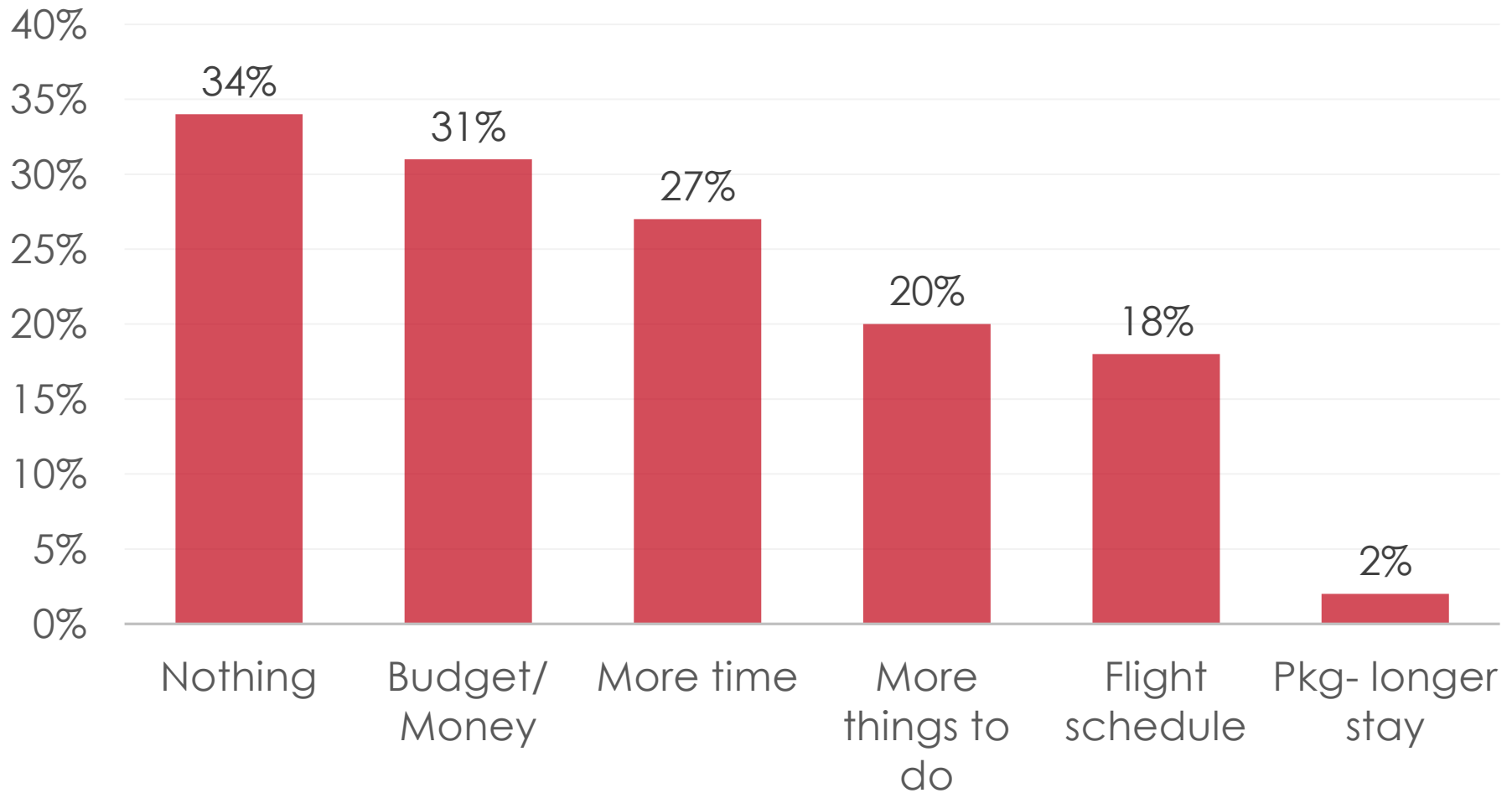
SECTION 6

FUTURE TRAVEL TO GUAM

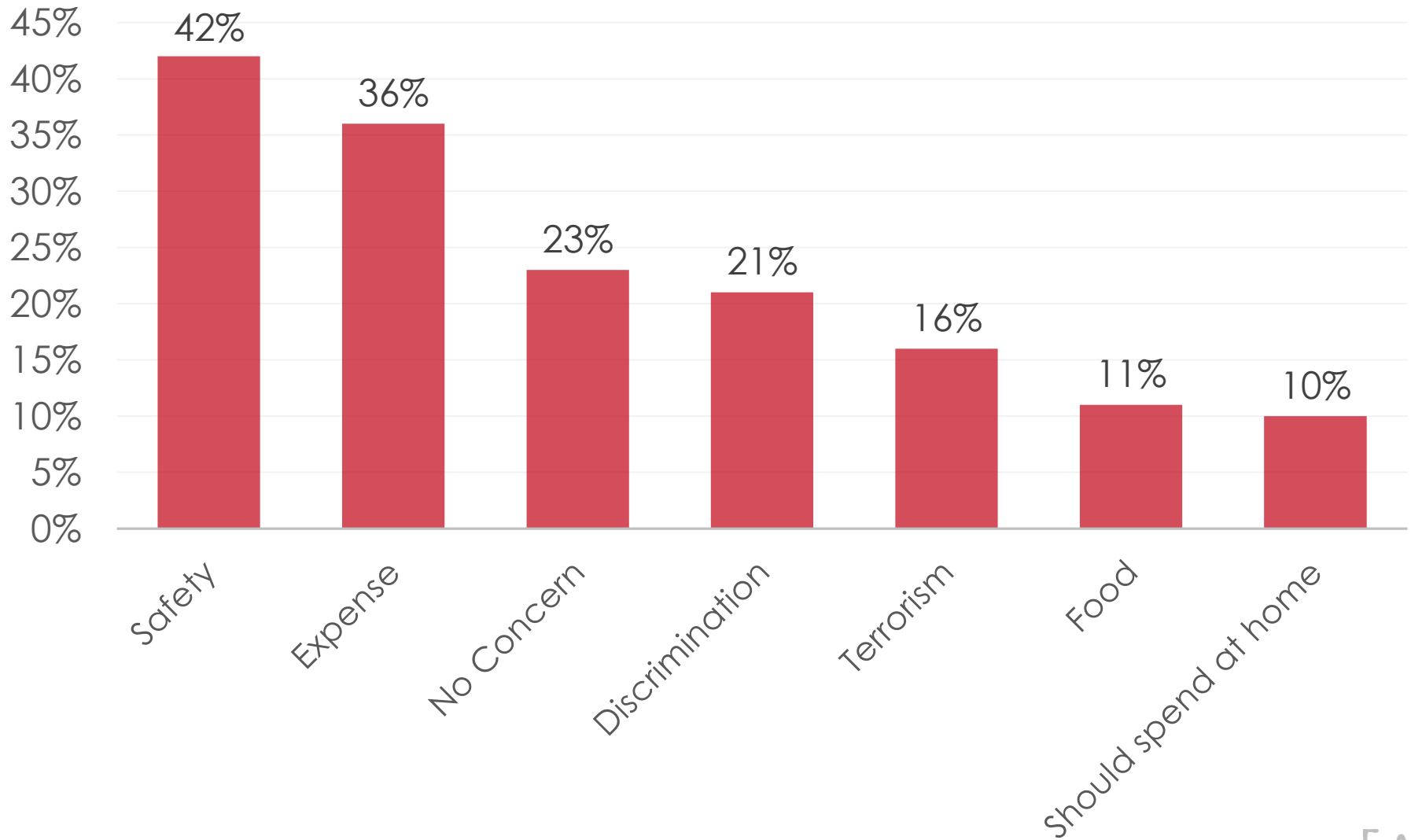
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



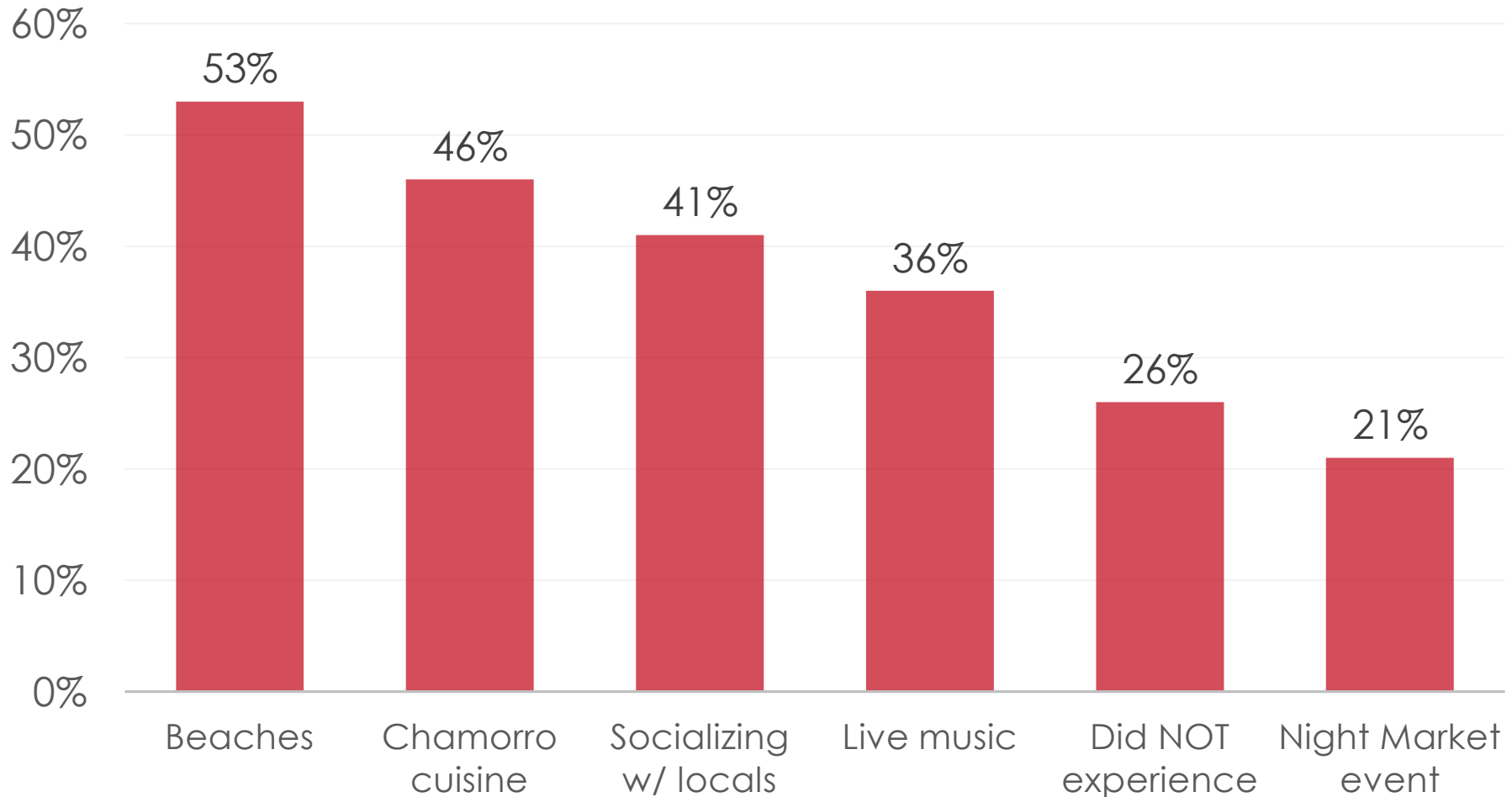
FUTURE TRAVEL CONCERNS



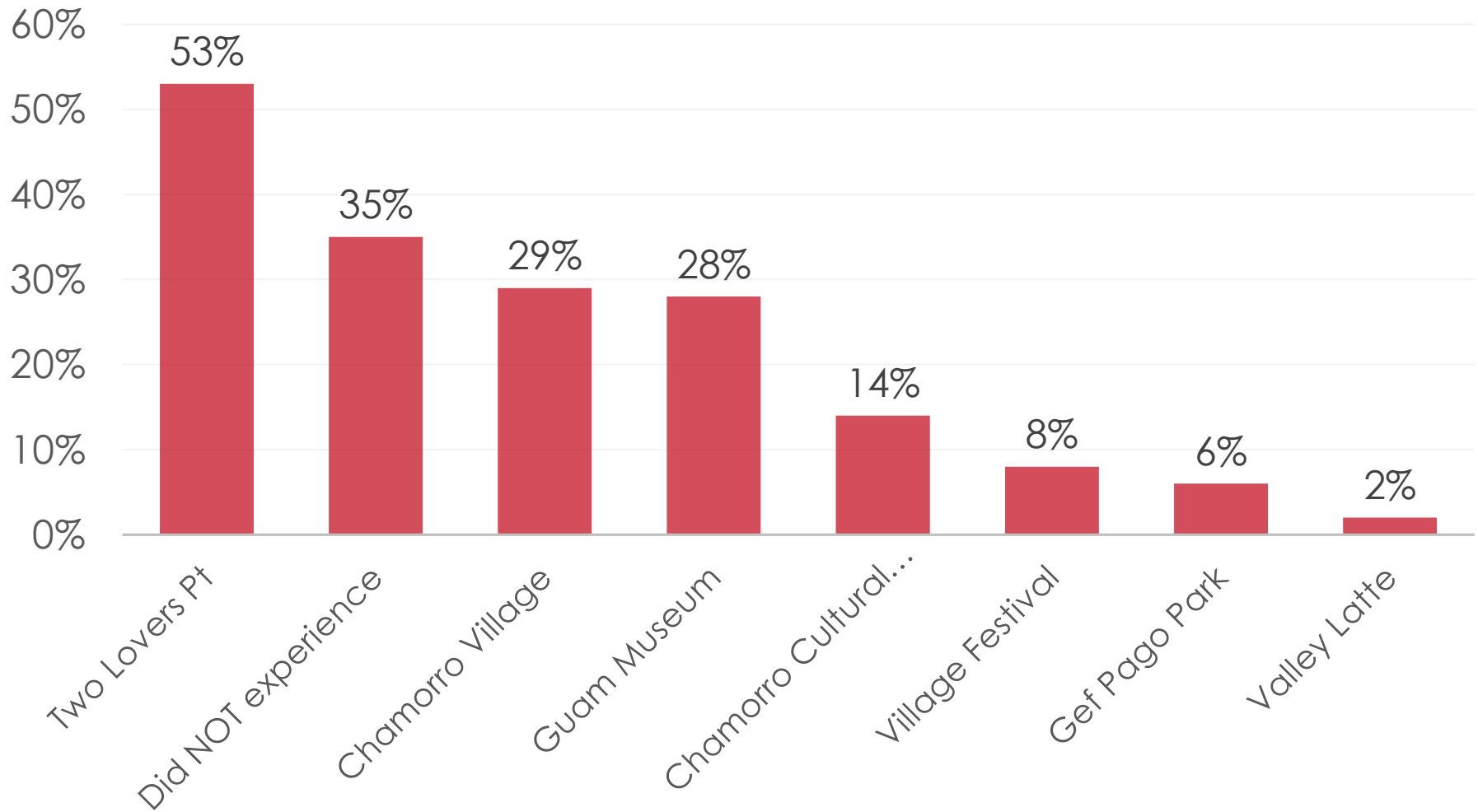
SECTION 7

GUAM CULTURE

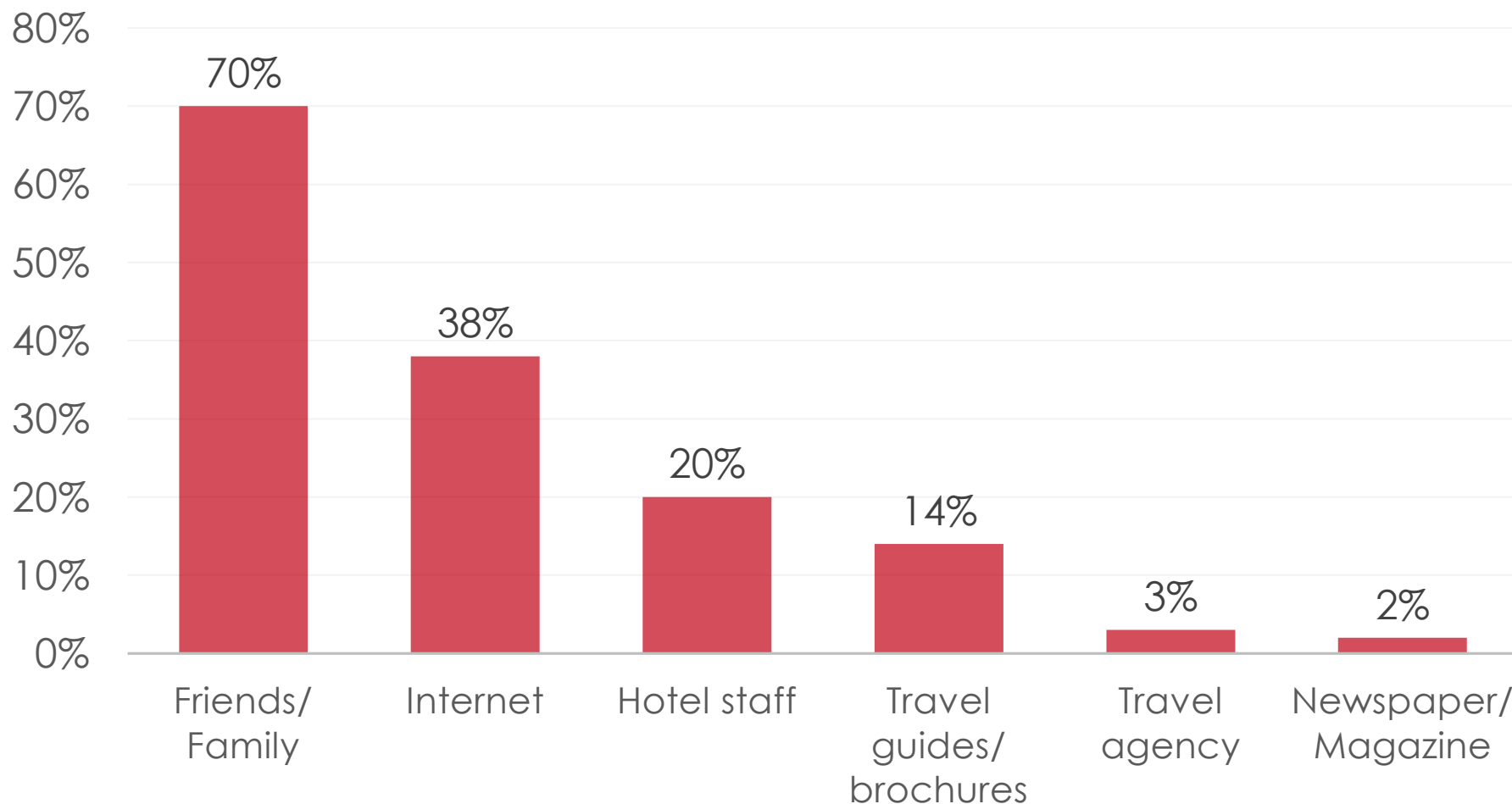
EXPERIENCED- CHAMORRO/ HAF A ADAI SPIRIT



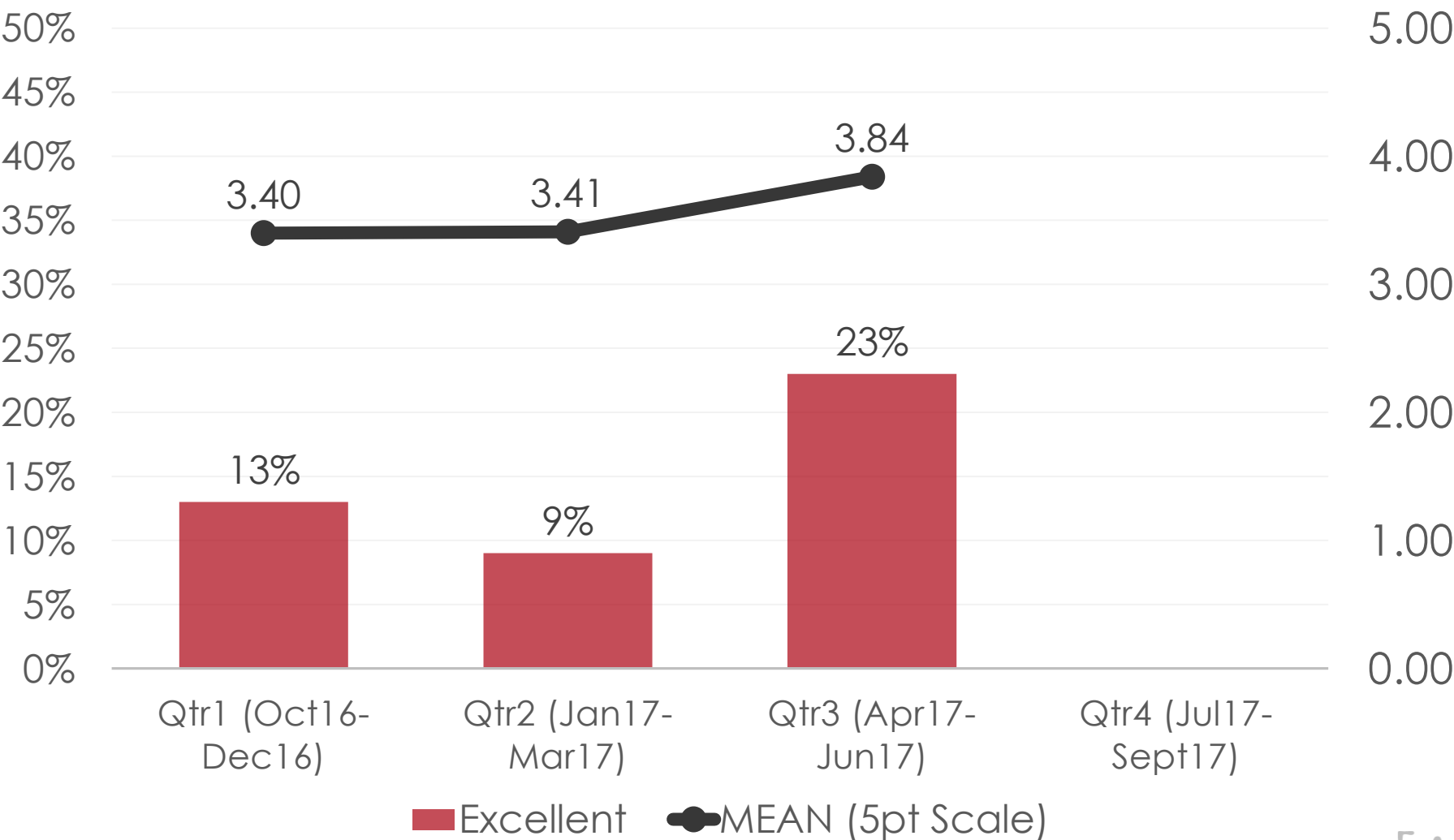
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



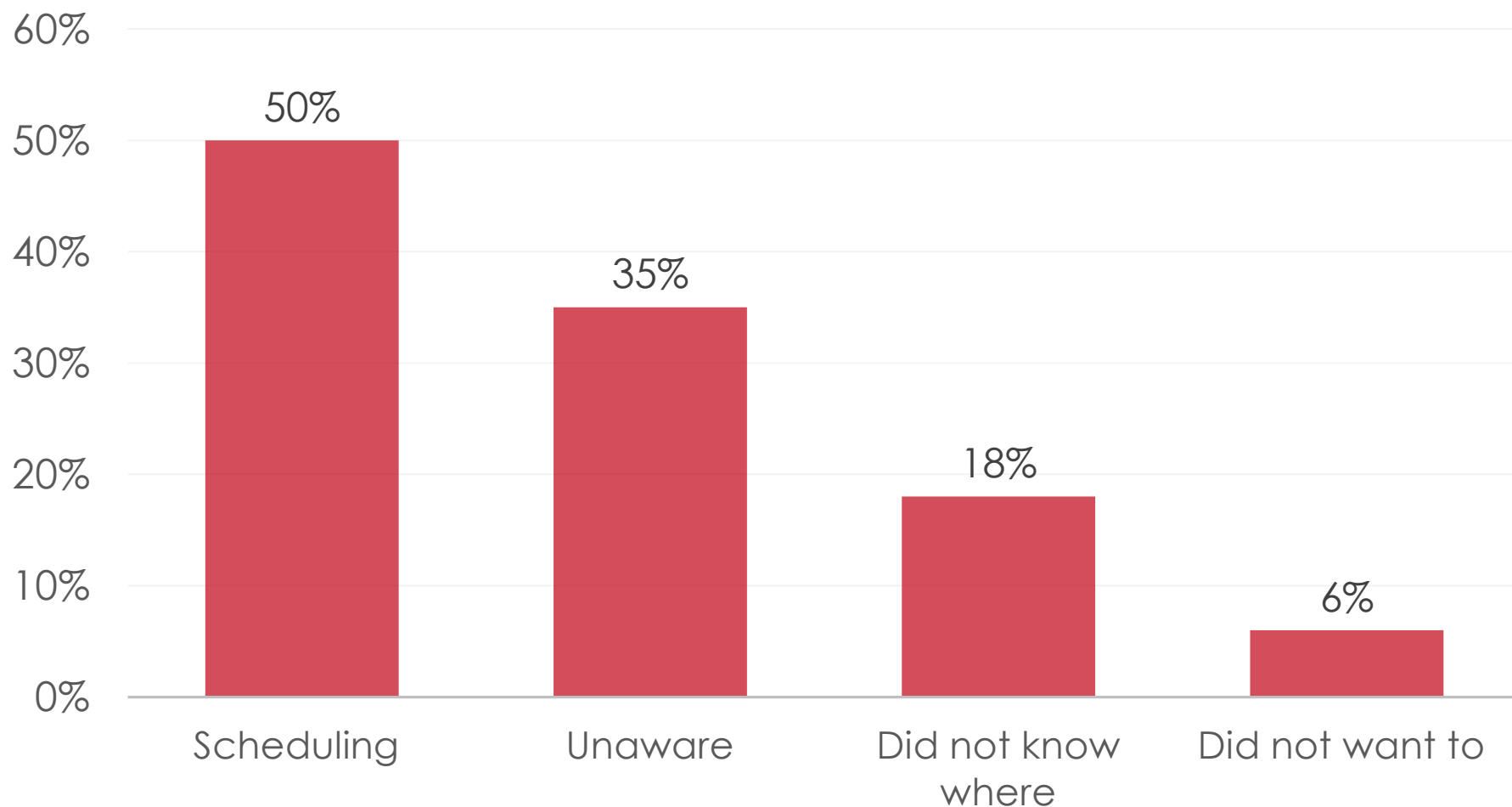
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



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, 1st, 2nd and 3rd Quarters 2017 and Overall 2017				
	1st Qtr. 2017	2nd Qtr 2017	3rd Qtr. 2017	1-3 Qtr Overall 2017
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks				4
Ease of getting around				
Safety walking around at night			1	
Quality of daytime tours				
Variety of daytime tours				
Quality of nighttime tours				2
Variety of nighttime tours				
Quality of shopping	4			
Variety of shopping		2		3
Price of things on Guam	2			
Quality of hotel accommodations		4		
Quality/cleanliness of air, sky	1			5
Quality/cleanliness of parks	3			1
Quality of landscape in Tumon				
Quality of landscape in Guam				
Quality of ground handler		3	2	
Quality/cleanliness of transportation vehicles		1		
% of Per Person On Island Expenditures Accounted For	72.8%	78.4%	83.8%	80.2%

Drivers of Overall Satisfaction

- **Overall satisfaction** with Filipino visitor's experience on Guam is driven by two significant factors in the 3rd Quarter 2017 Period. By rank order they are:
 - **Safety walking around at night, and**
 - **Quality of ground handler.**
- With all four factors the overall r^2 is .838 meaning that **83.8% of overall satisfaction is accounted for by these factors.**

Drivers – On-Isle Expenditures

Drivers of Per Person On Island Expenditures, 1st, 2nd and 3rd Qtr. 2017 and Overall 2017				
	1st Qtr 2017	2nd Qtr 2017	3rd Qtr. 2017	1-3 Qtr Overall 2017
Drivers:	rank	rank	rank	rank
Ease of getting around		2		
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		1		
Quality of landscape in Guam				
Quality of ground handler				
Quality/cleanliness of transportation vehicles				
% of Per Person On Island Expenditures Accounted For	8.8%	27.5%	0.0%	0.0%
NOTE: Only significant drivers are included.				

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Filipino visitors on Guam is driven by no significant factor in the 3rd Quarter 2017 period.