

# Guam Visitors Bureau

## Filipino Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

QTR.4 (JULY - SEPT 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 **110** departing Filipino visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **110** is +/- 9.34 percentage points with a 95% confidence level. That is, if all Filipino visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 9.34 percentage points.

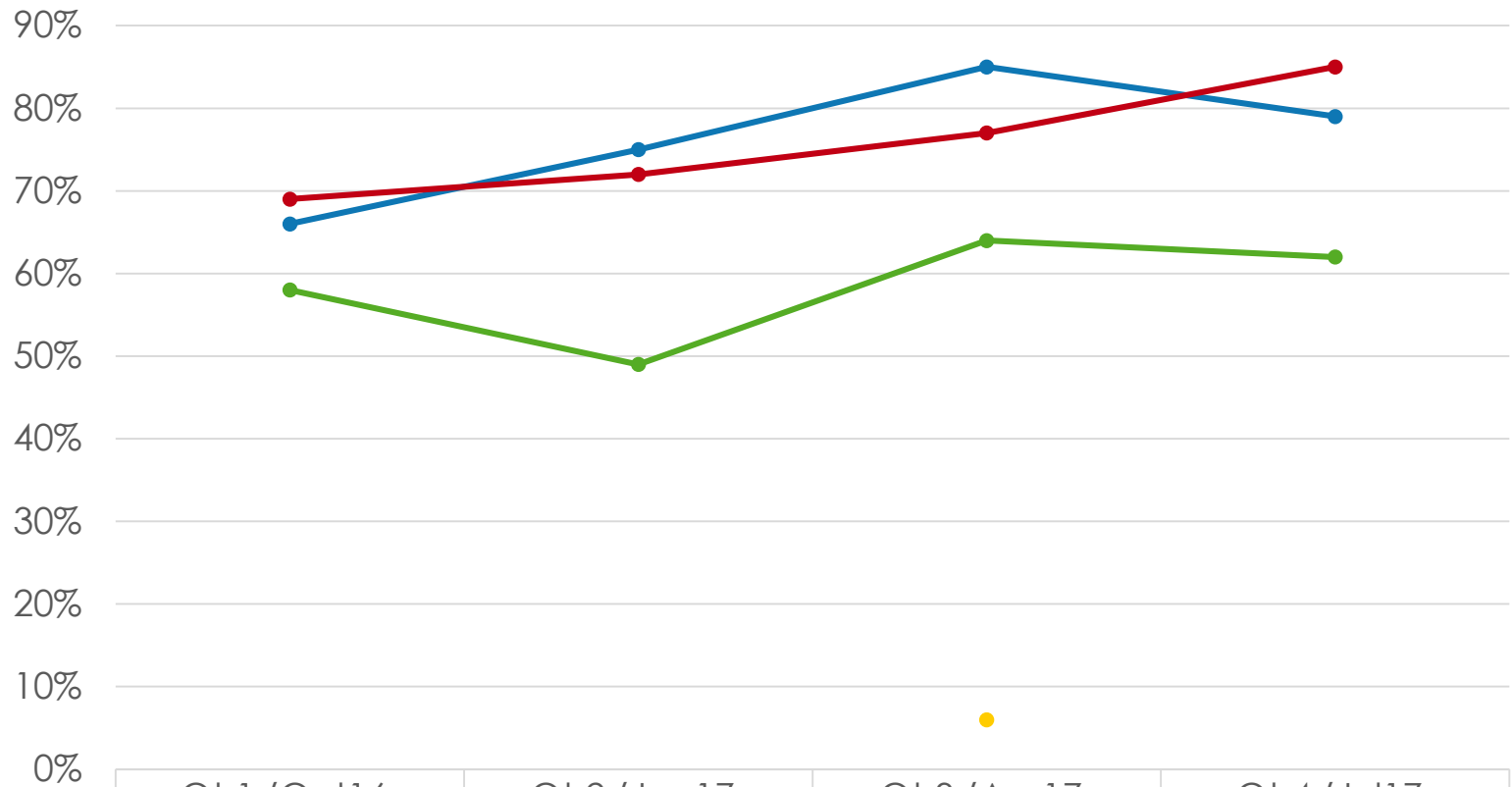
# Objectives

- 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

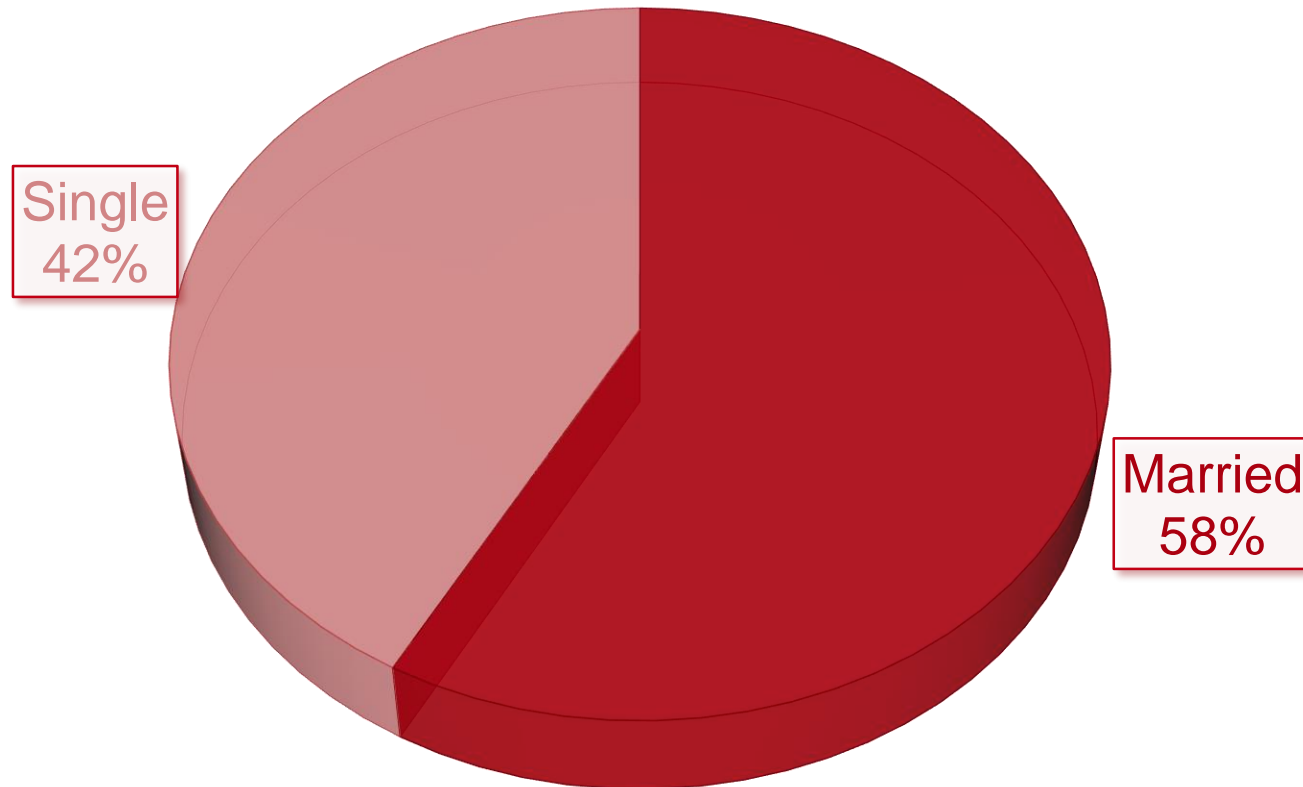


	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sep17)
<span style="color: blue;">—●—</span> FITs	66%	75%	85%	79%
<span style="color: red;">—●—</span> Leisure Trvl	69%	72%	77%	85%
<span style="color: green;">—●—</span> Family	58%	49%	64%	62%
<span style="color: yellow;">—●—</span> MICE			6%	

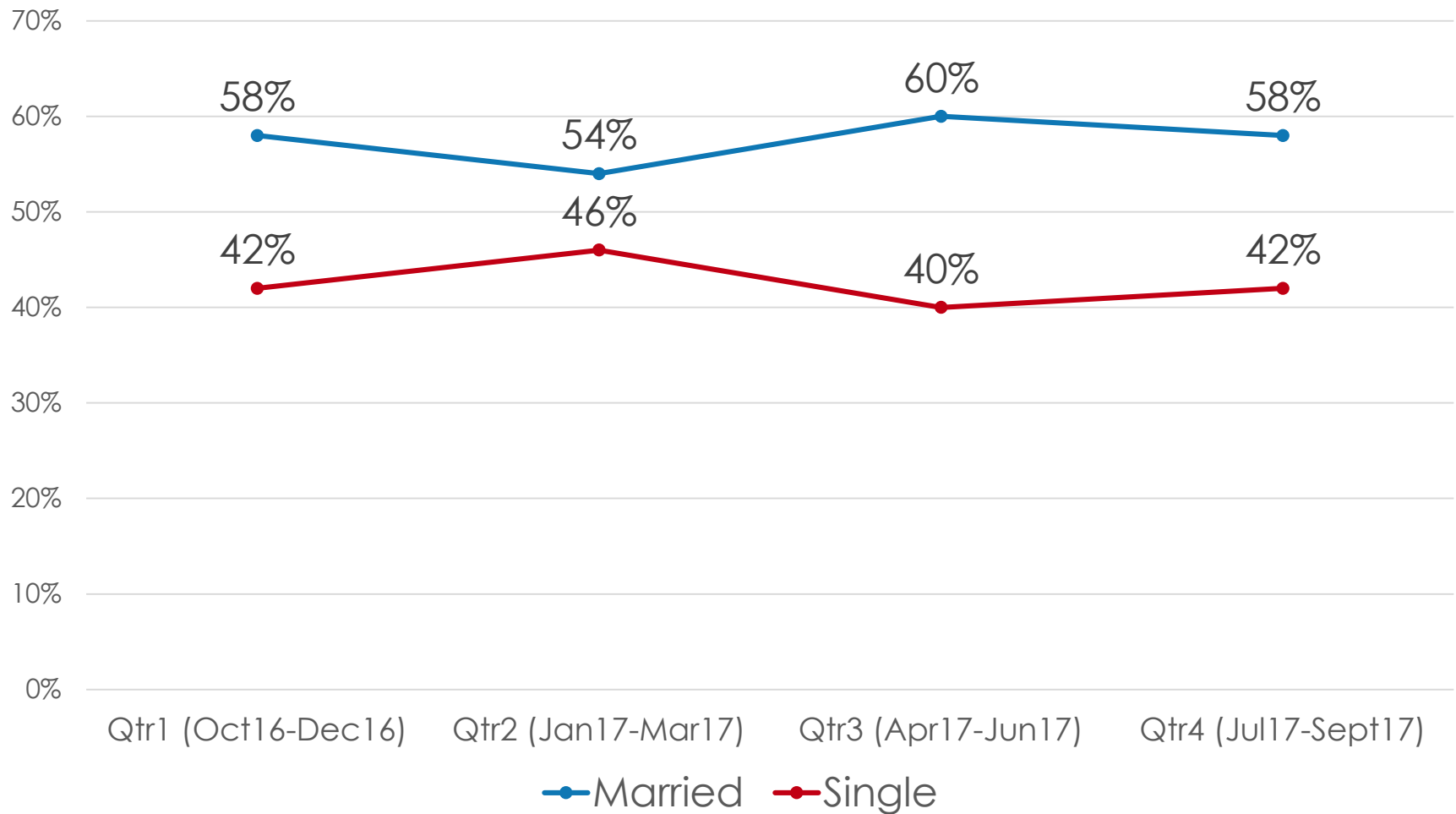
# SECTION 1

# PROFILE OF RESPONDENTS

# Marital Status



# Marital status – FY2017 Tracking





# Marital status – Key Segments

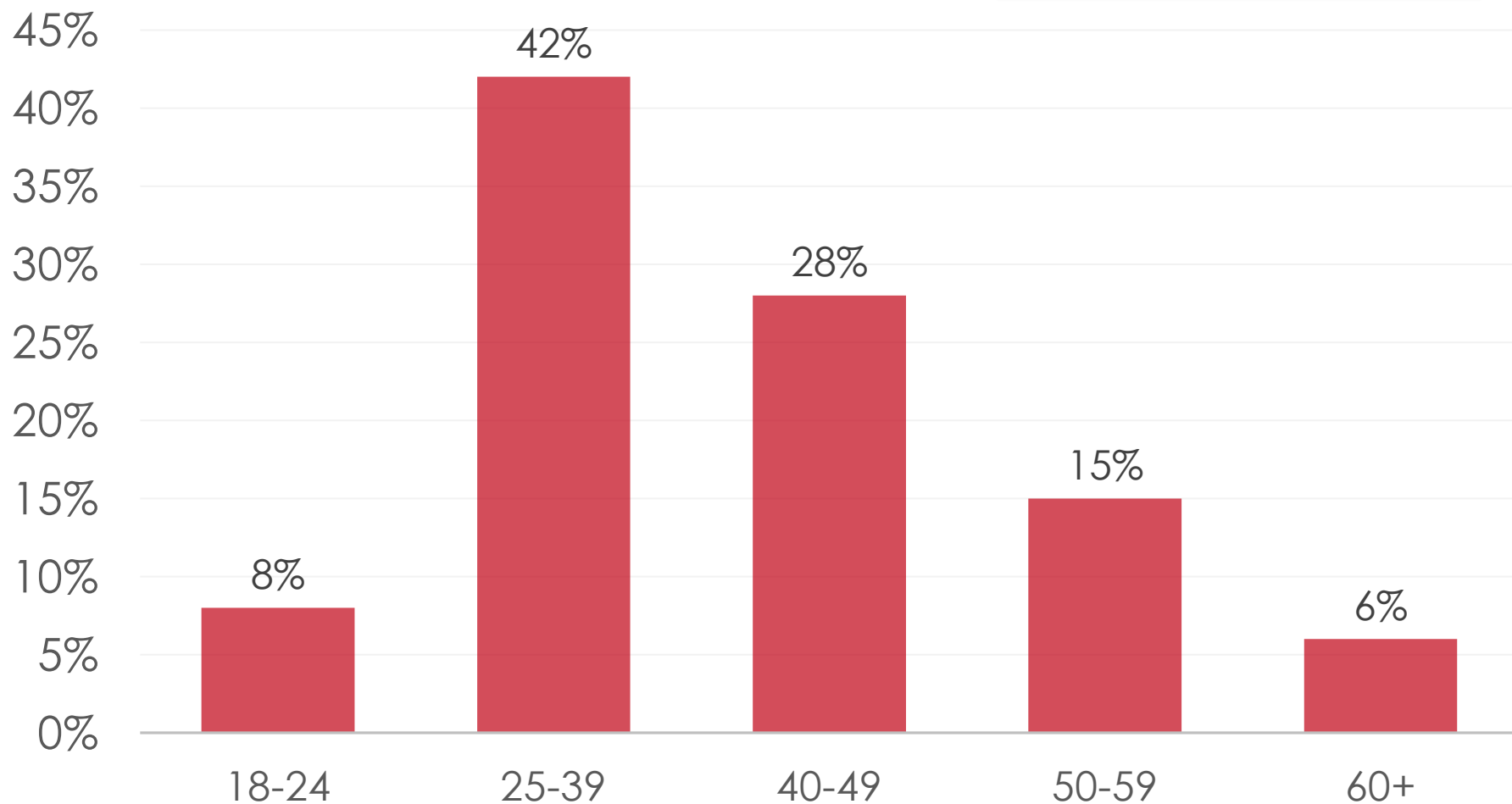
**GVB EXIT SURVEY  
QE MARITAL STATUS**

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
QE	Married	58%		61%	57%	71%
	Single	42%		39%	43%	29%
	Total	110		94	87	68

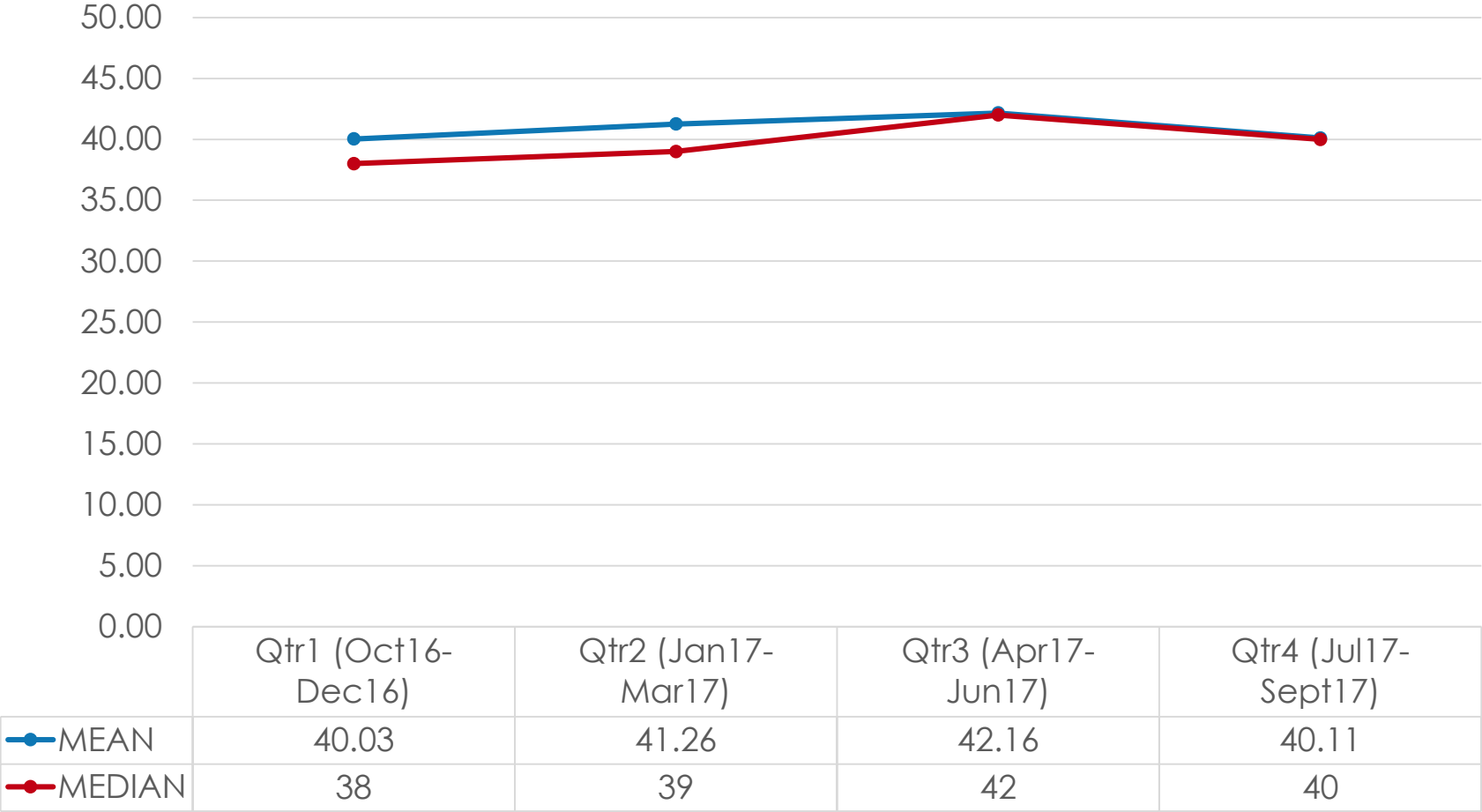
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# Age

MEAN = 40.11  
MEDIAN = 40



# Age – FY2017 Tracking



# Age – Key Segments

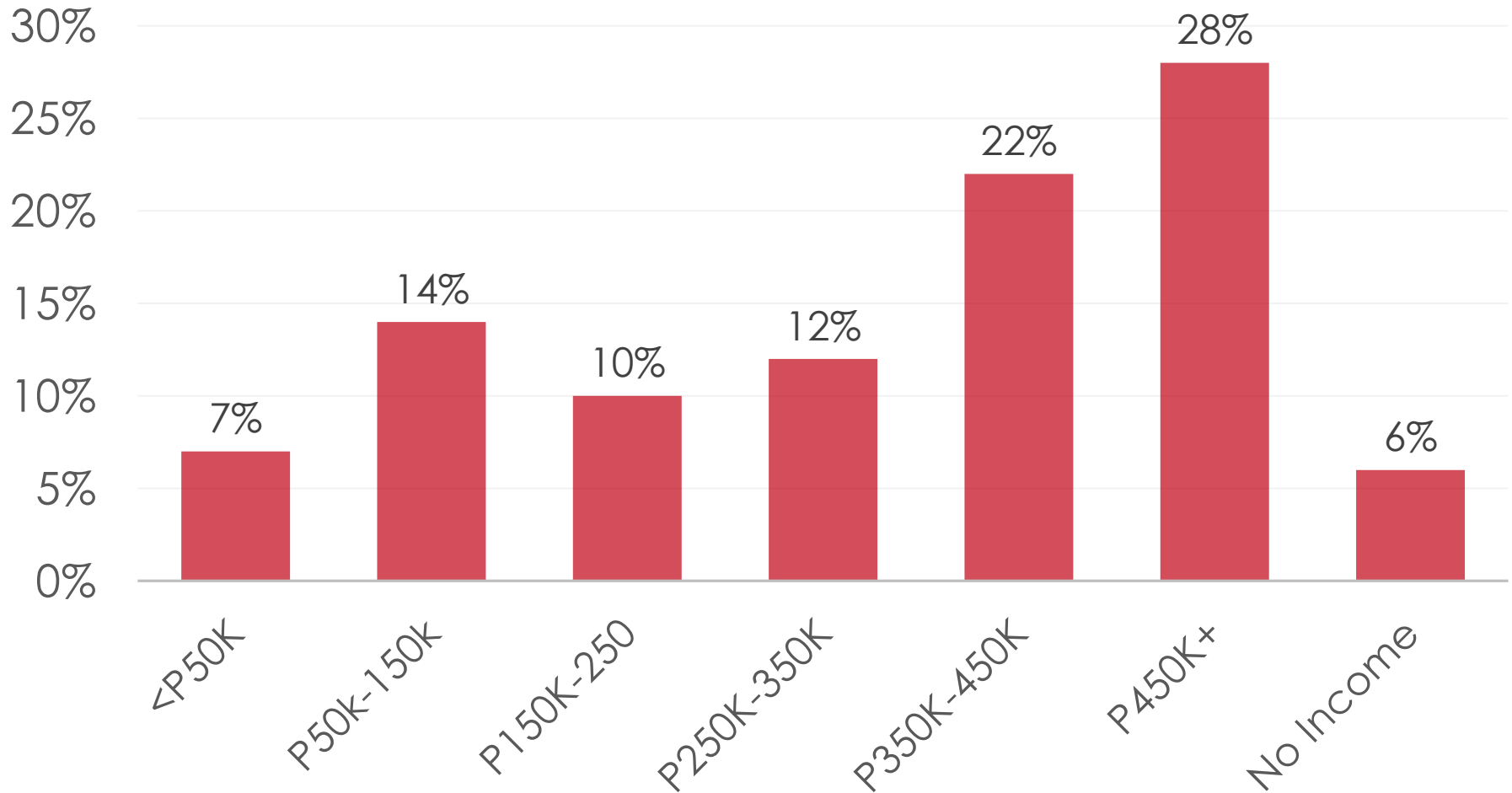
GVB EXIT SURVEY  
AGE

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
SD	18-24	8%		9%	7%	10%
	25-39	42%		41%	46%	40%
	40-49	28%		29%	24%	28%
	50-59	15%		14%	16%	15%
	60+	6%		7%	7%	7%
	Total	110		94	87	68
SD	Mean	40.11	.	40.29	40.00	40.50
	Median	40	.	40	38	40

Prepared by Anthology Research

# Annual Household Income

EXCHANGE RATE Peso 50.76=\$1



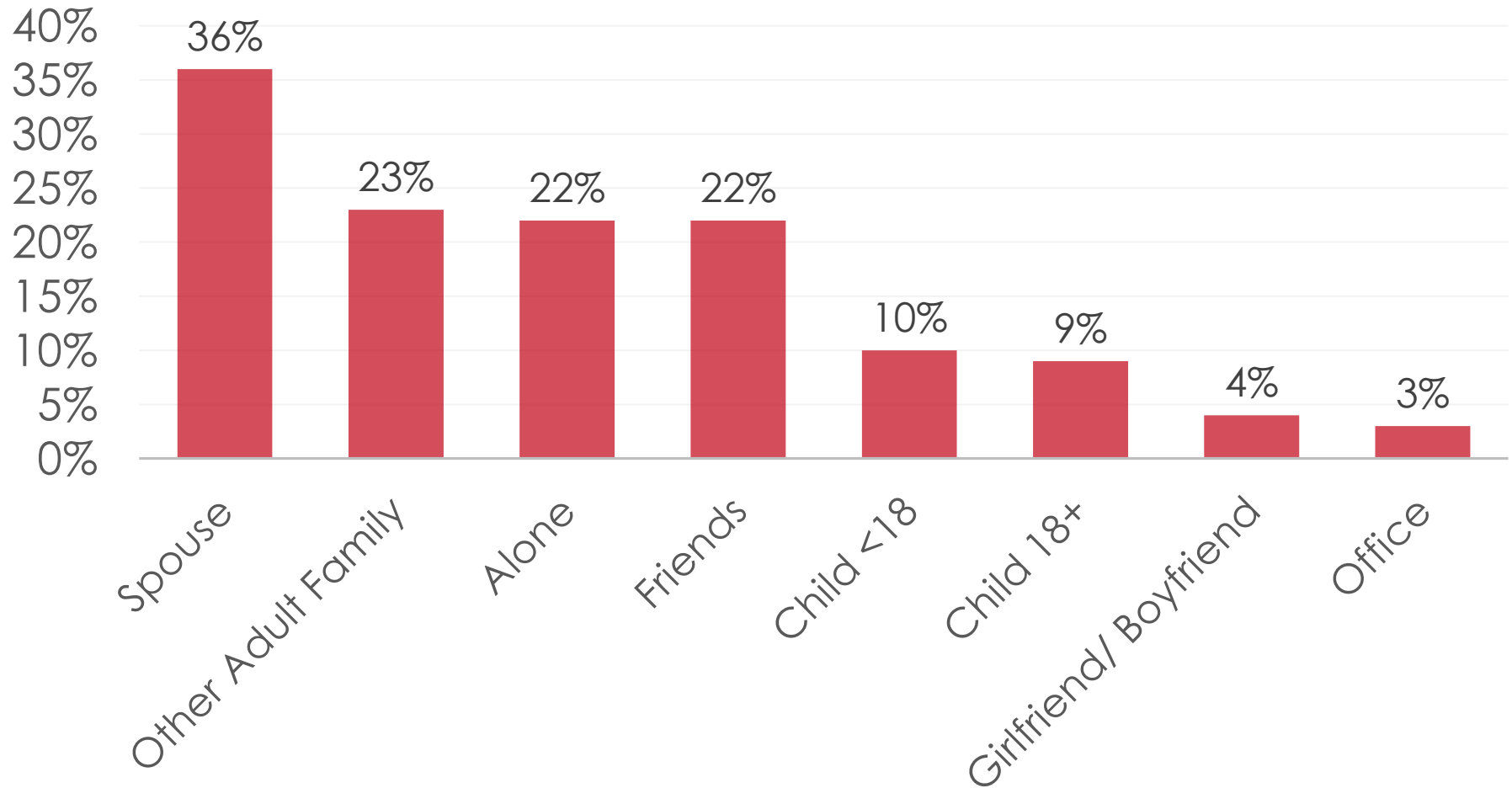
# Annual Household Income – Key Segments

**GVB EXIT SURVEY**  
**Q26 Household income:**

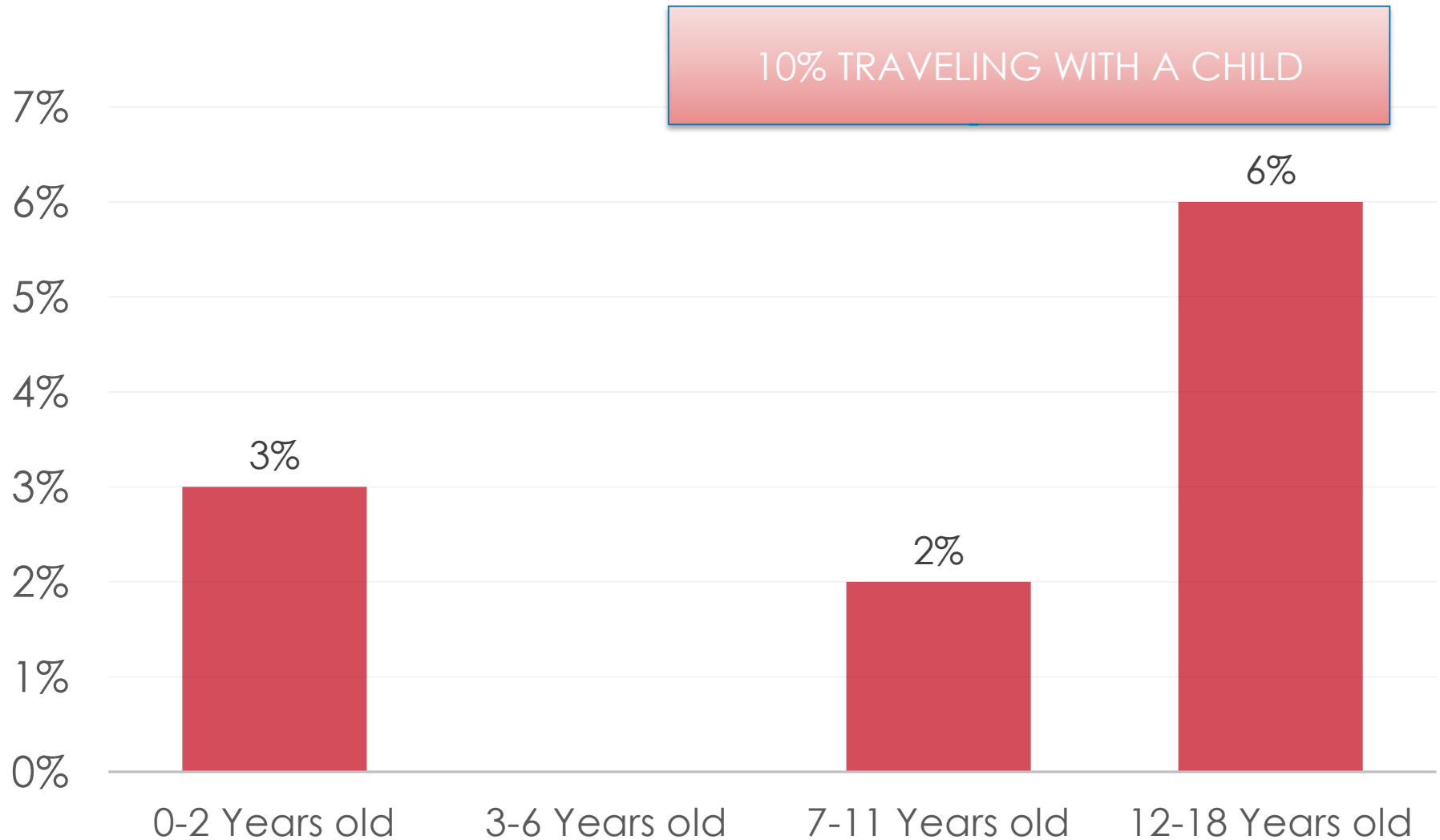
		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q26	Up to P50K	7%		9%	5%	5%
	P50K-P150K	14%		14%	13%	15%
	P150K-P250K	10%		10%	7%	5%
	P250K-P350K	12%		10%	13%	11%
	P350K-P450K	22%		23%	27%	29%
	P450K+	28%		29%	30%	29%
	No Income	6%		5%	5%	8%
	Total	107		91	84	66

Prepared by Anthology Research

# Travel Party

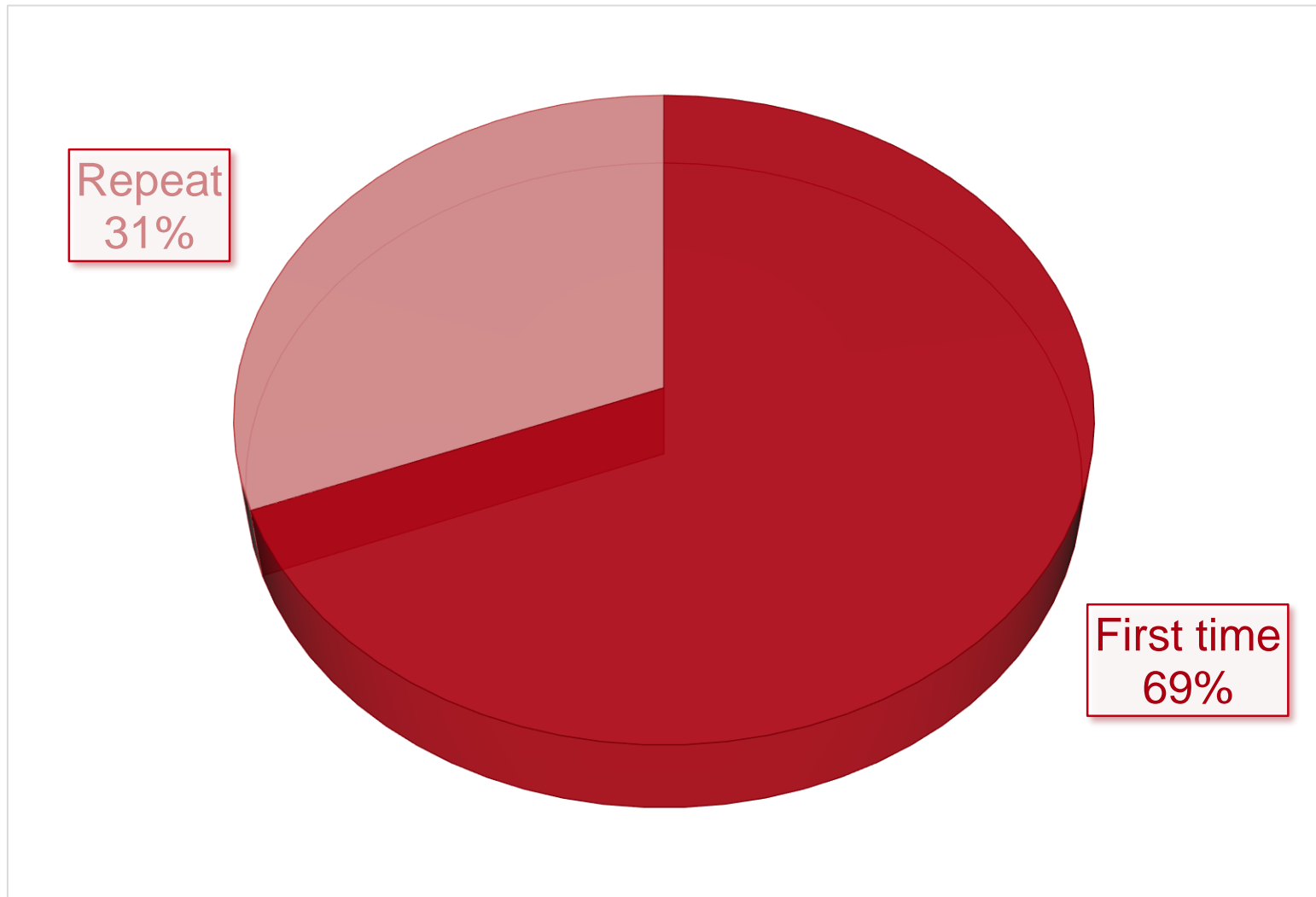


# Travel Party - Children

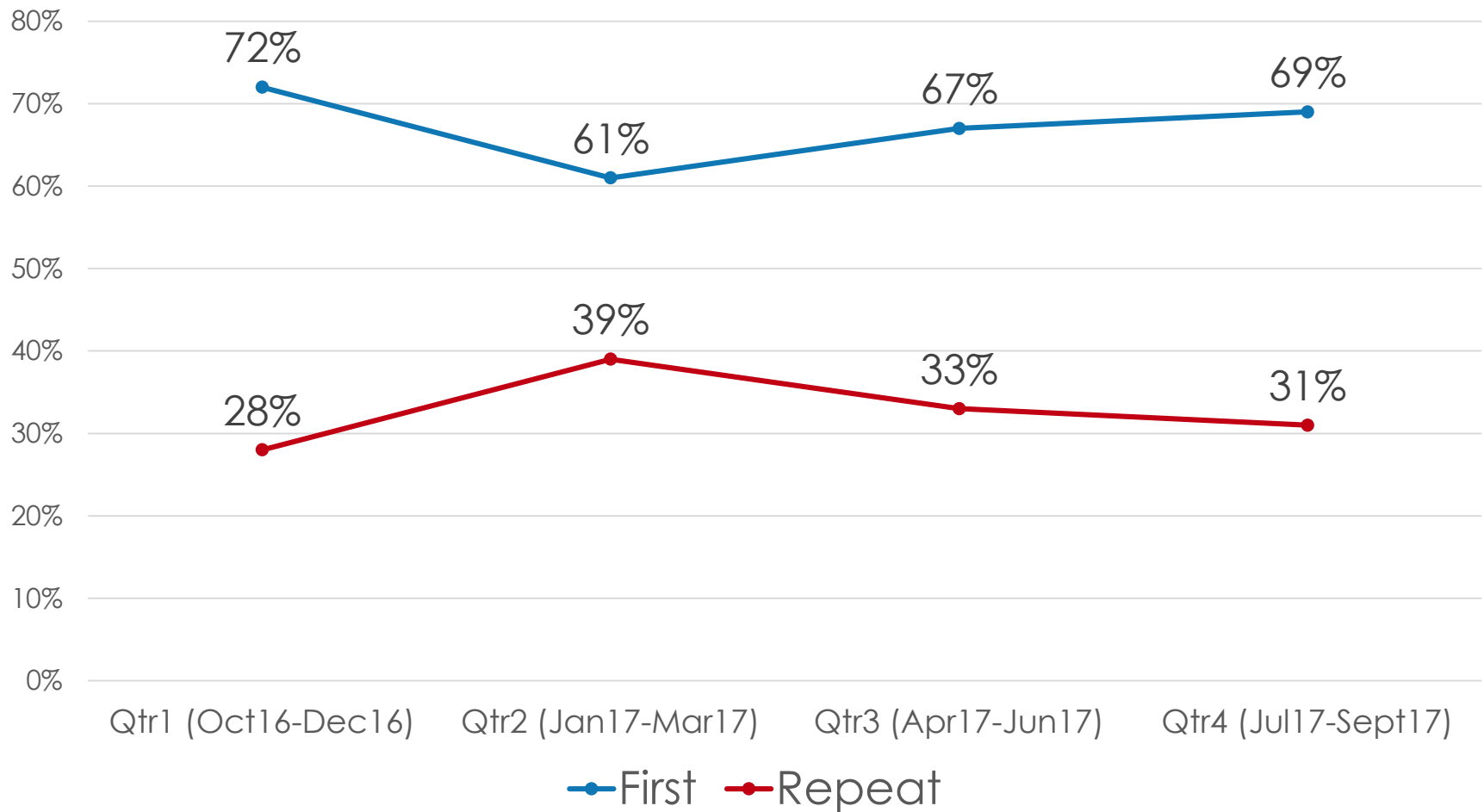




# Trips to Guam



# Trips to Guam – FY2017 Tracking



# Trips to Guam – Key Segments

## GVB EXIT SURVEY

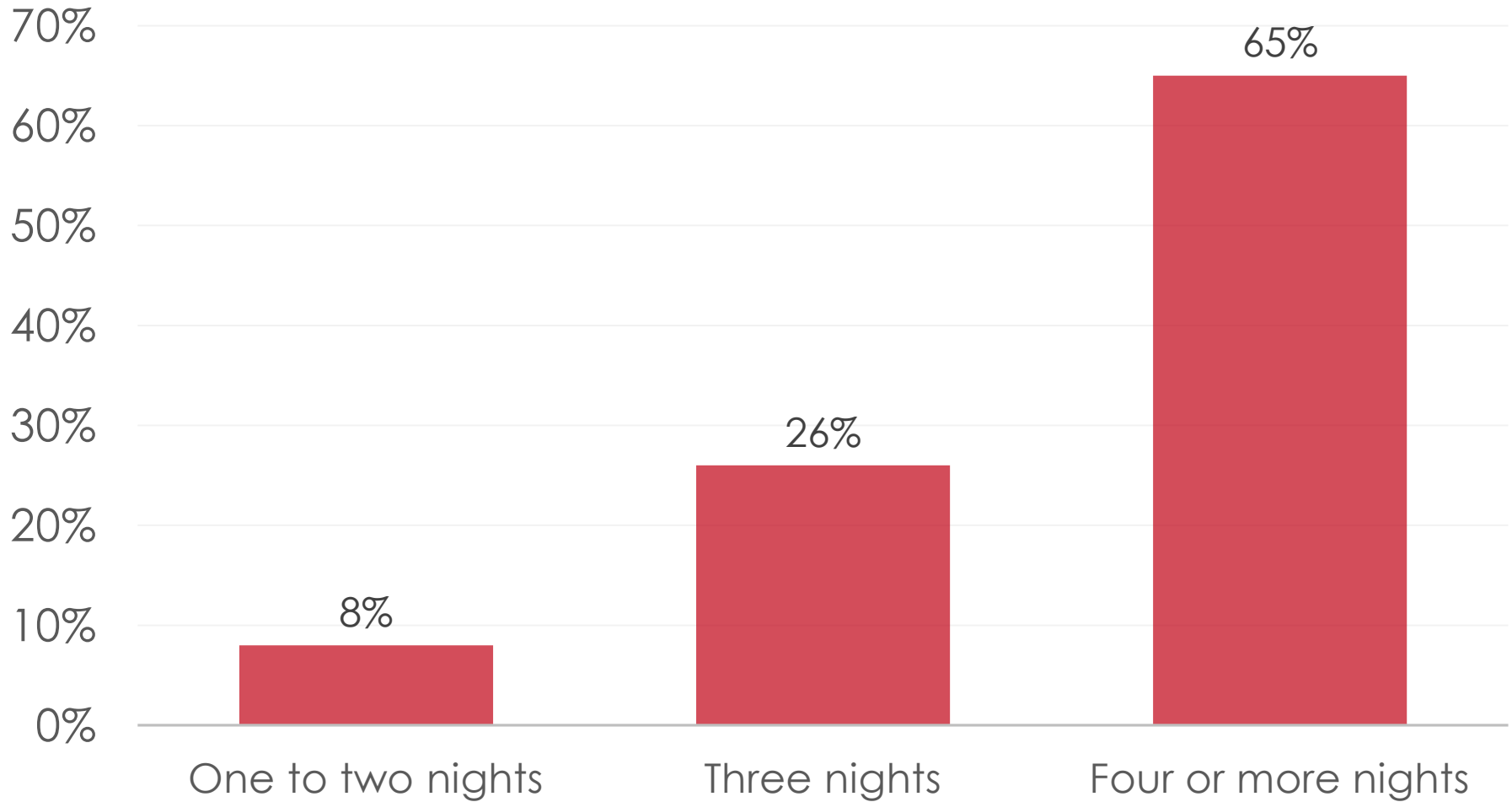
**Q3 Including this trip, how many times have you visited Guam?**

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q3	1st Time	69%		69%	72%	68%
	Repeat	31%		31%	28%	32%
	Total	110		94	87	68
Q3A	Mean	1.78	.	1.76	1.62	1.85
	Median	1	.	1	1	1

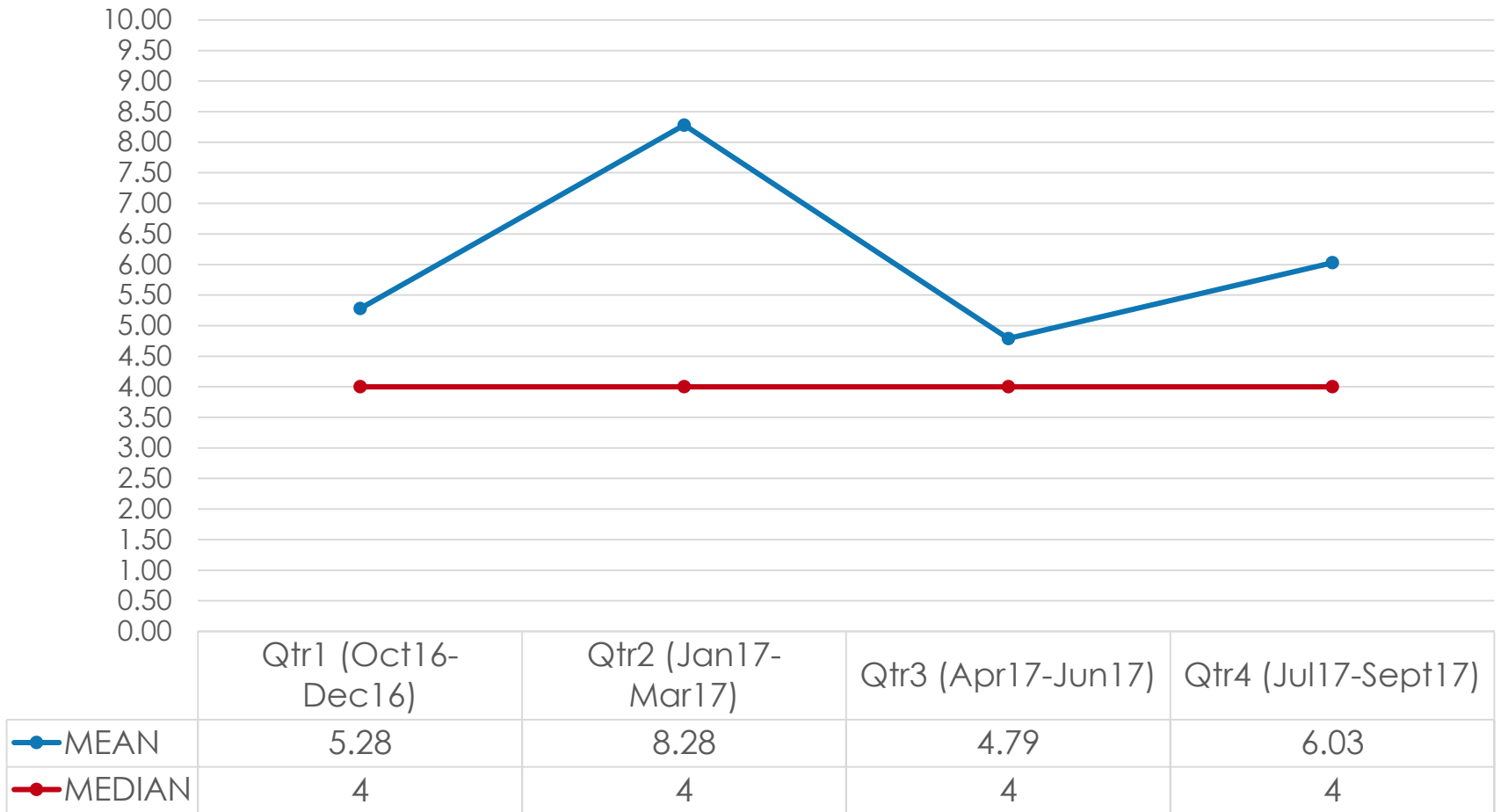
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# Length of Stay

MEAN NUMBER OF NIGHTS = 6.03  
MEDIAN NUMBER OF NIGHTS = 4



# Length of Stay – FY2017 Tracking



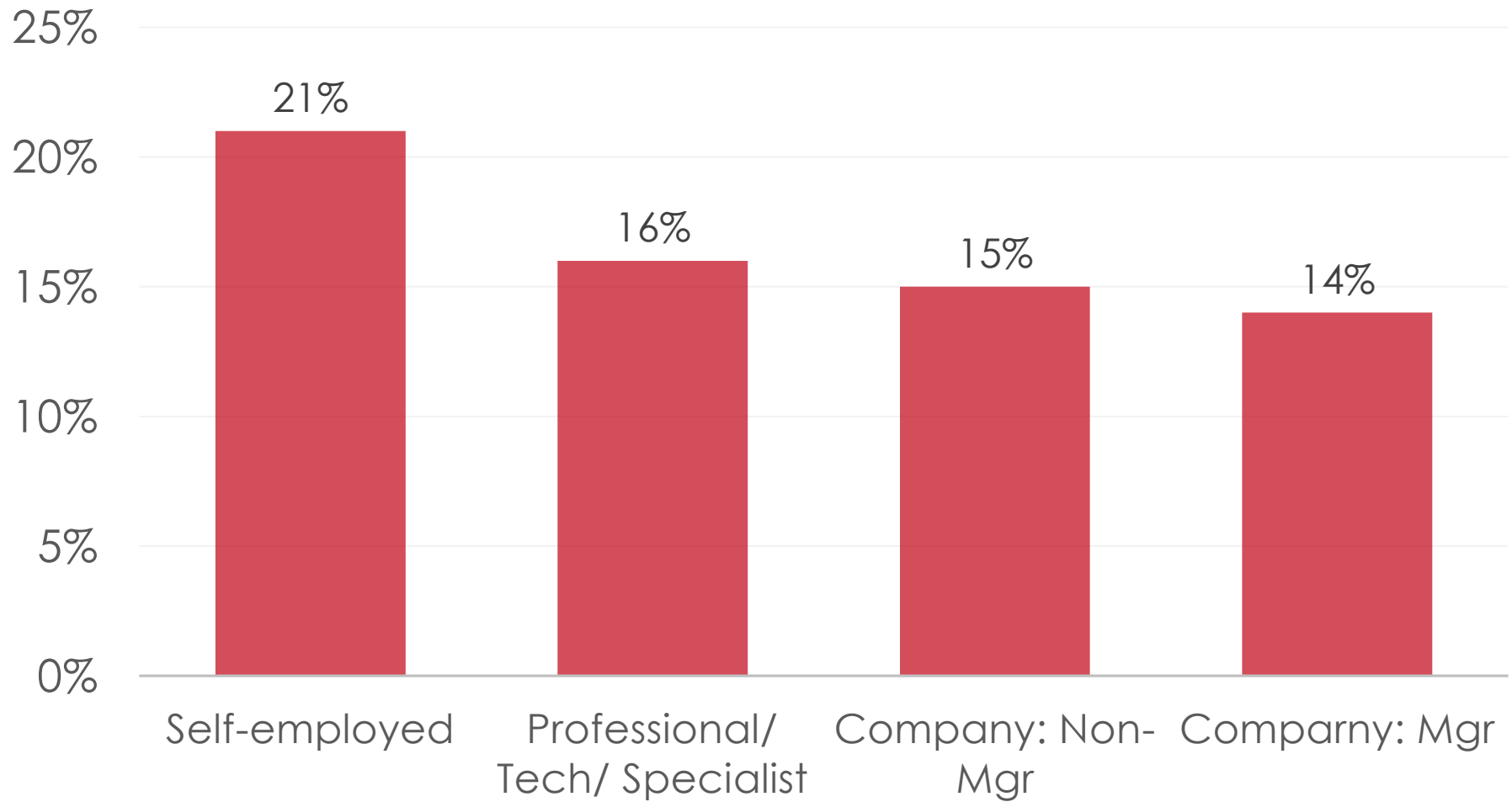
# Length of Stay – Key Segments

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

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
SA	1-2	8%		9%	7%	9%
	3	26%		26%	31%	26%
	4+	65%		66%	62%	65%
	Total	110		94	87	68
SA	Mean	6.03	.	6.27	5.75	5.56
	Median	4	.	4	4	4

Prepared by Anthology Research

# Occupation – Top Responses (10%+)

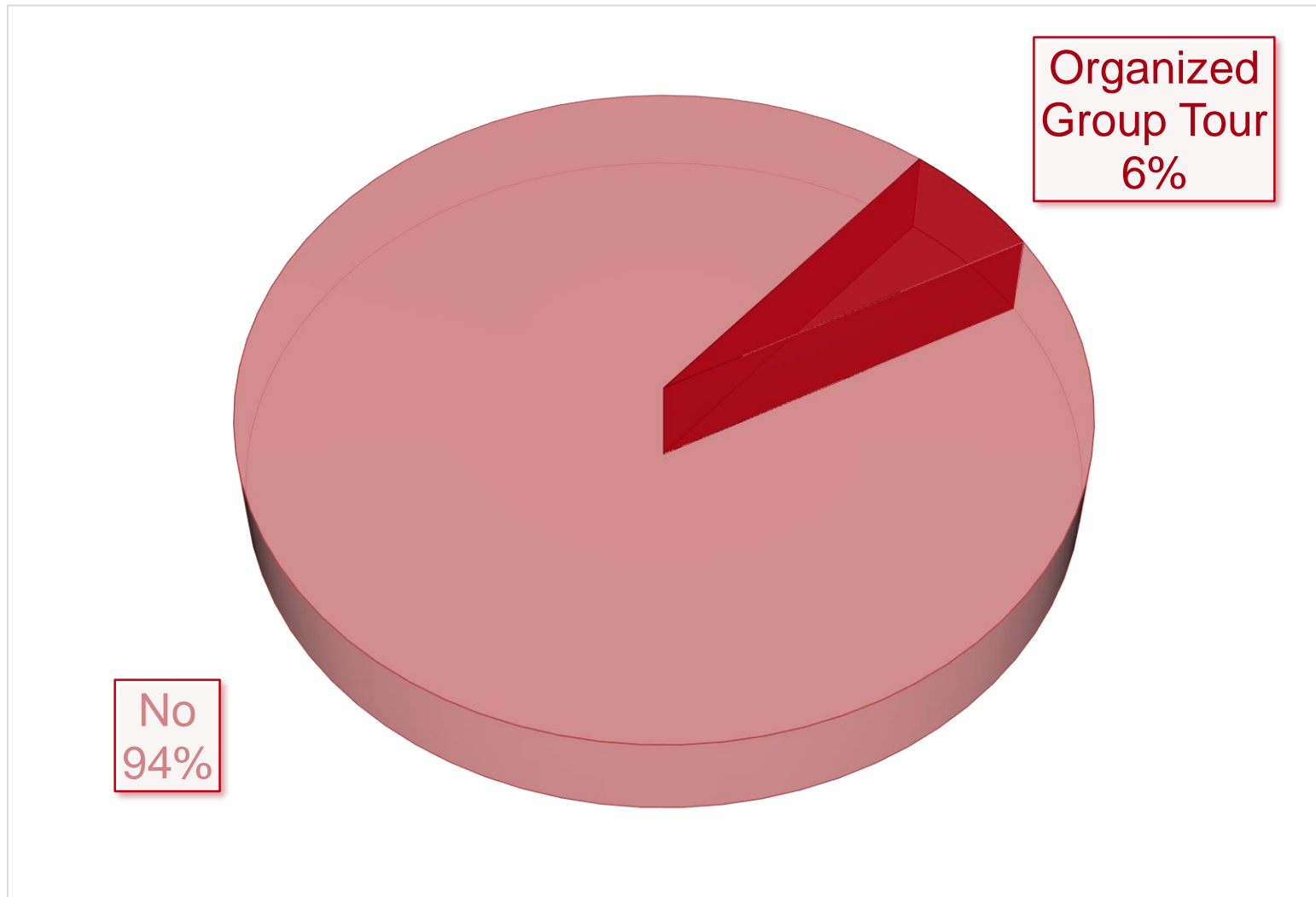


# SECTION 2

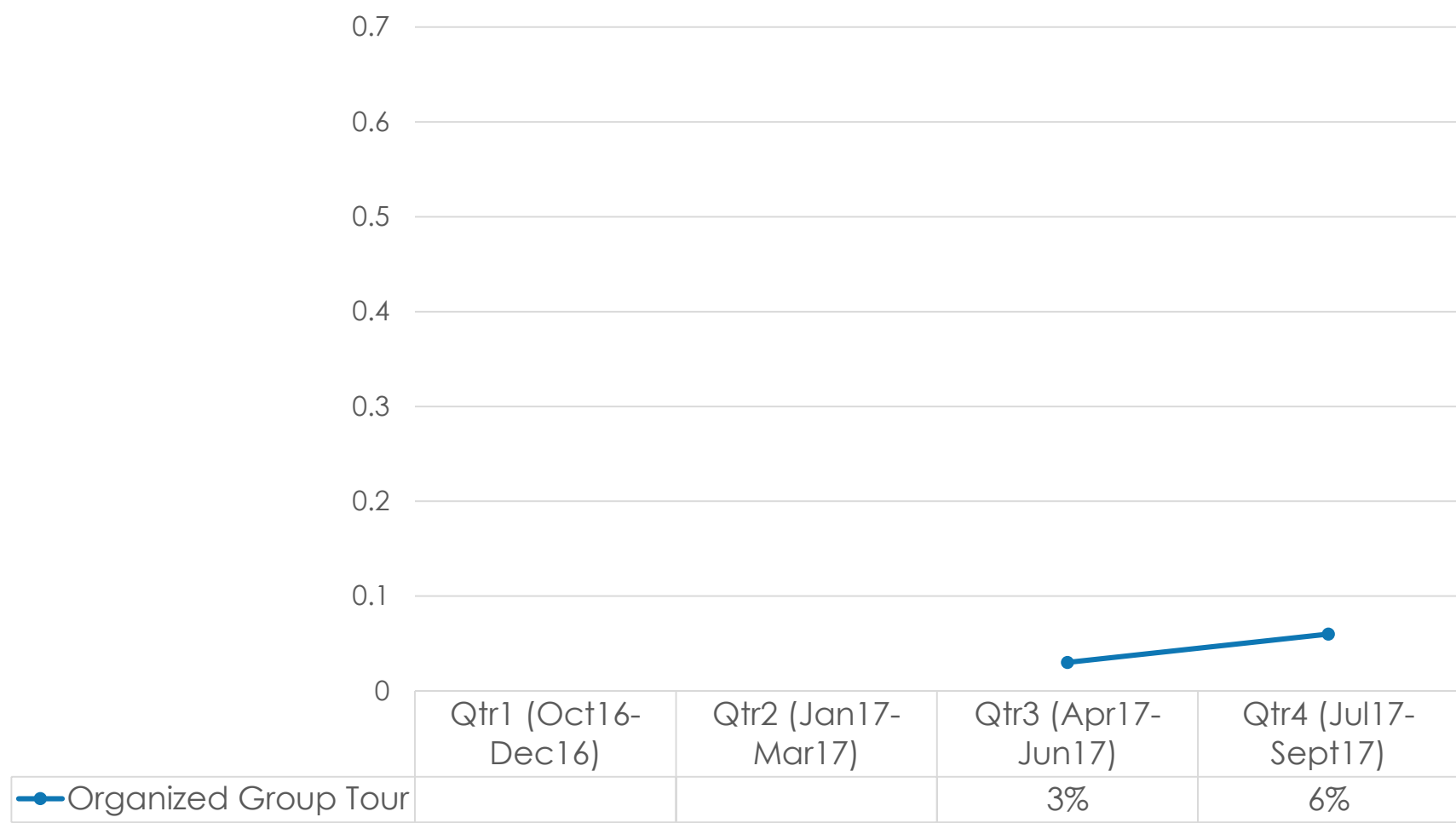
# TRAVEL PLANNING



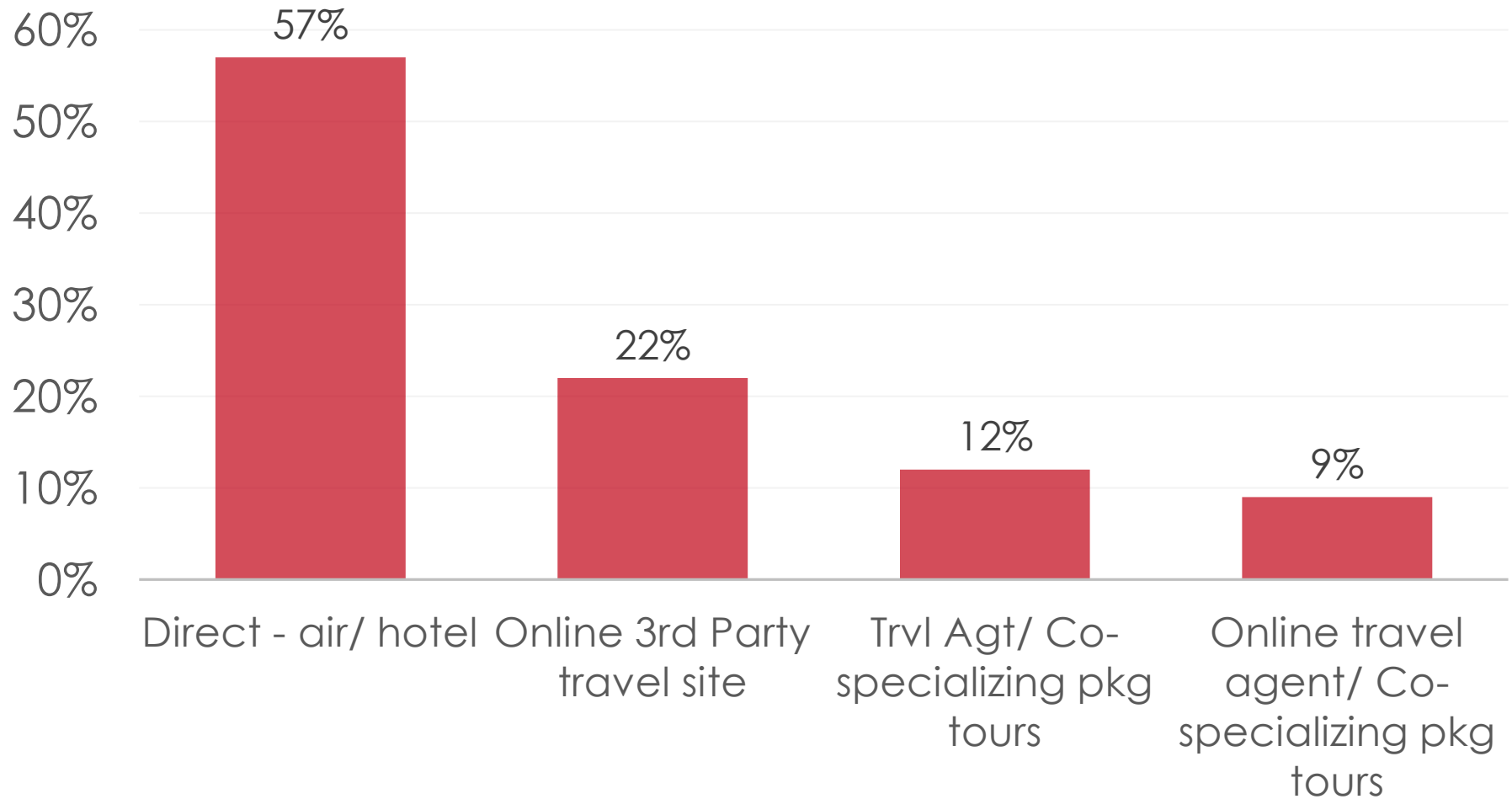
# Organized Group Tour



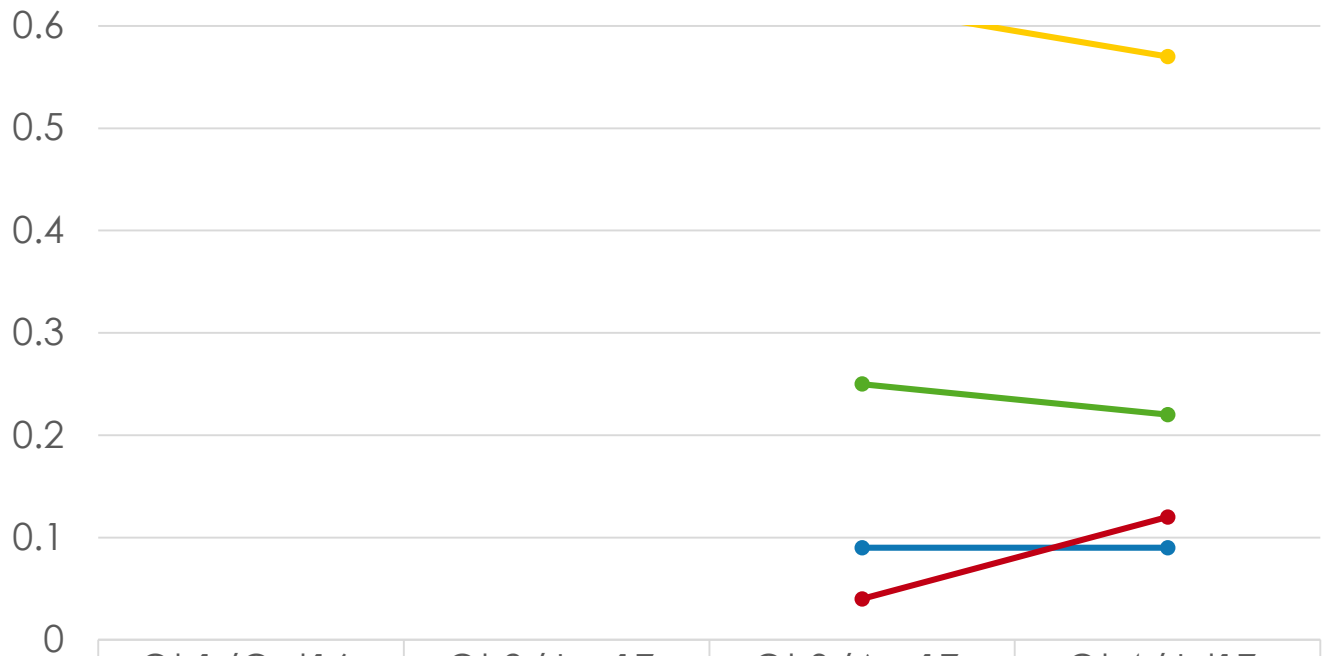
# Organized Group Tour



# Travel Arrangements Sources

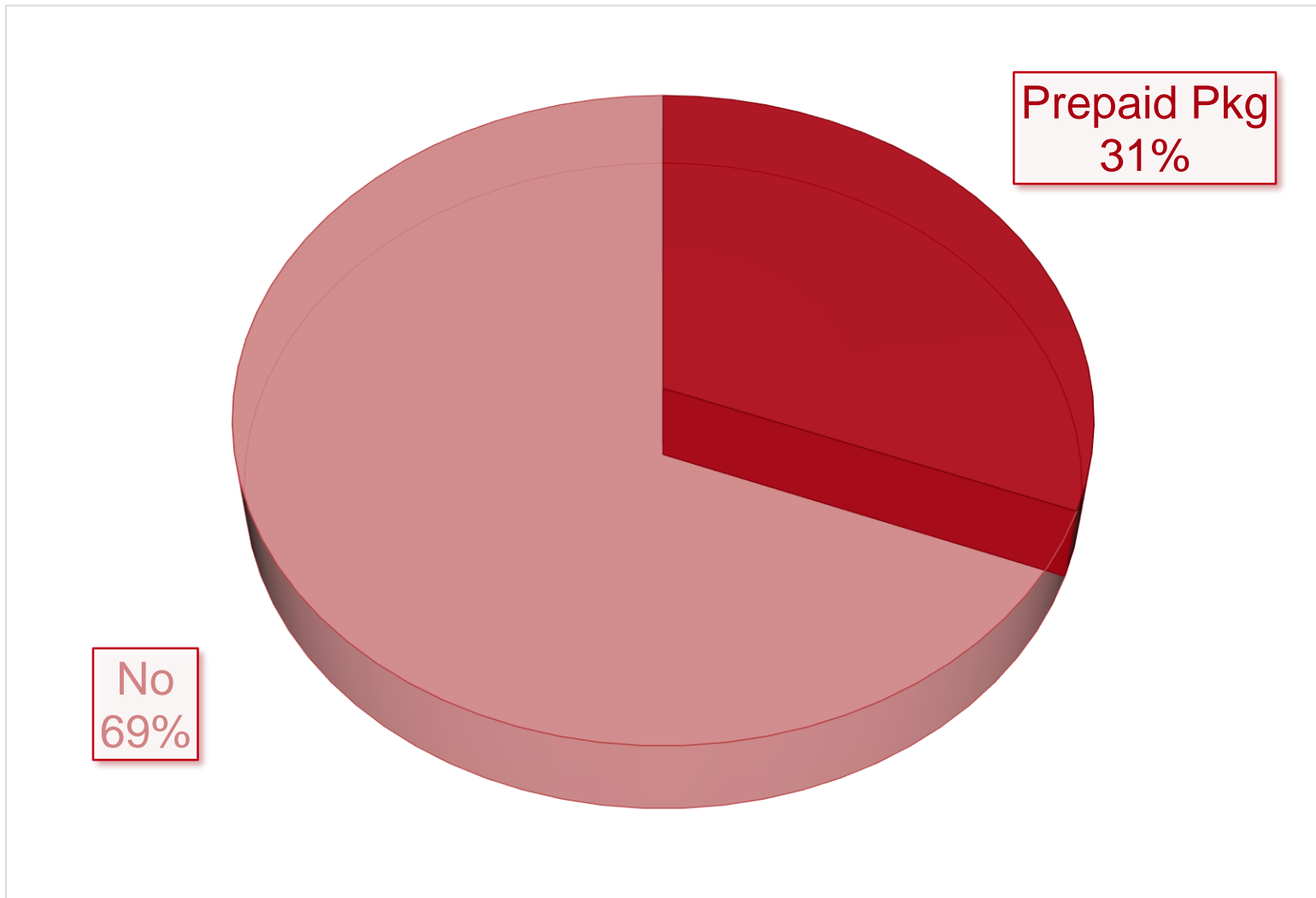


# Travel Arrangements Sources

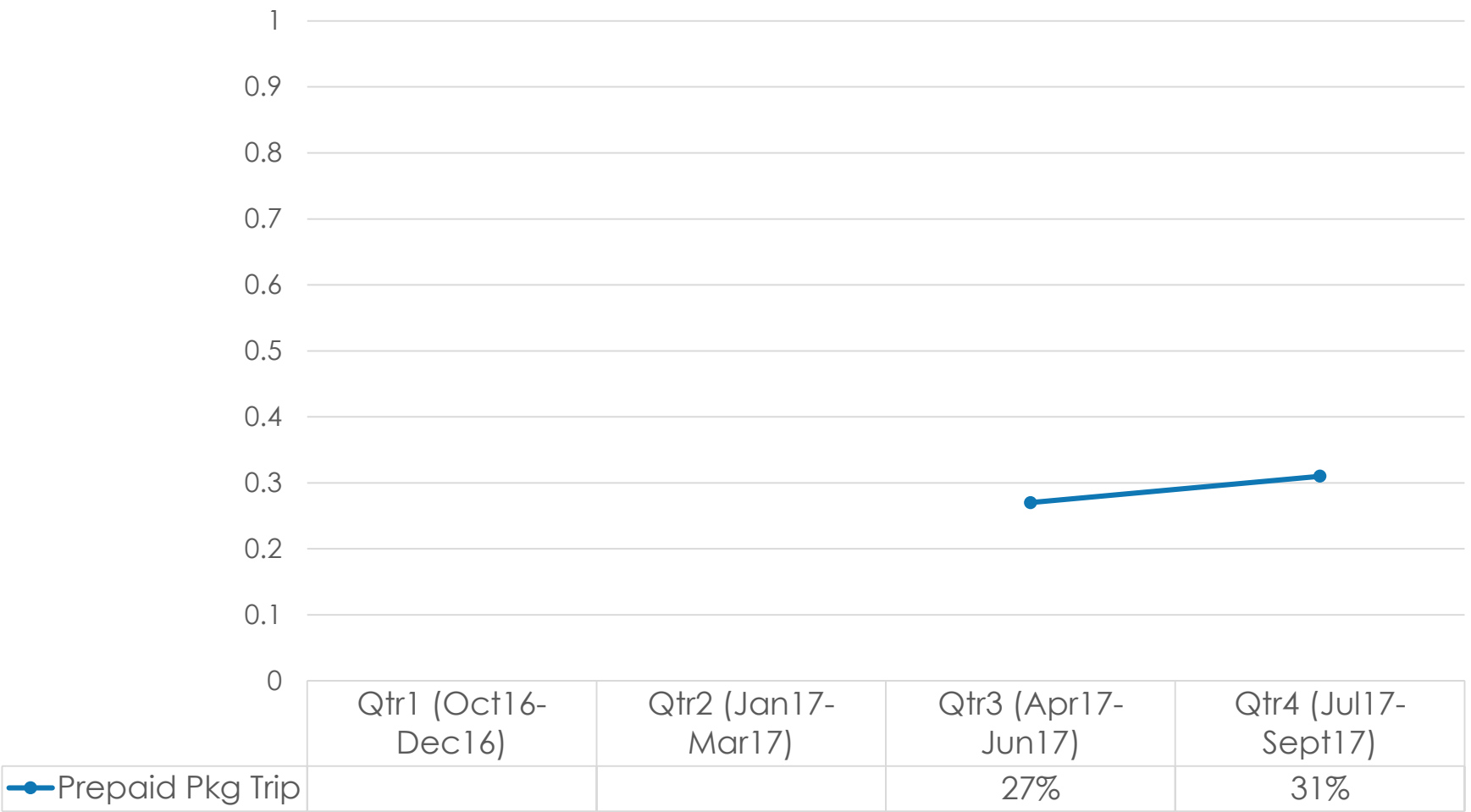


Online travel agent			9%	9%
Trvl Agt/ Co- Pkg Tour			4%	12%
Online 3rd Party			25%	22%
Direct Air/ Hotel			62%	57%

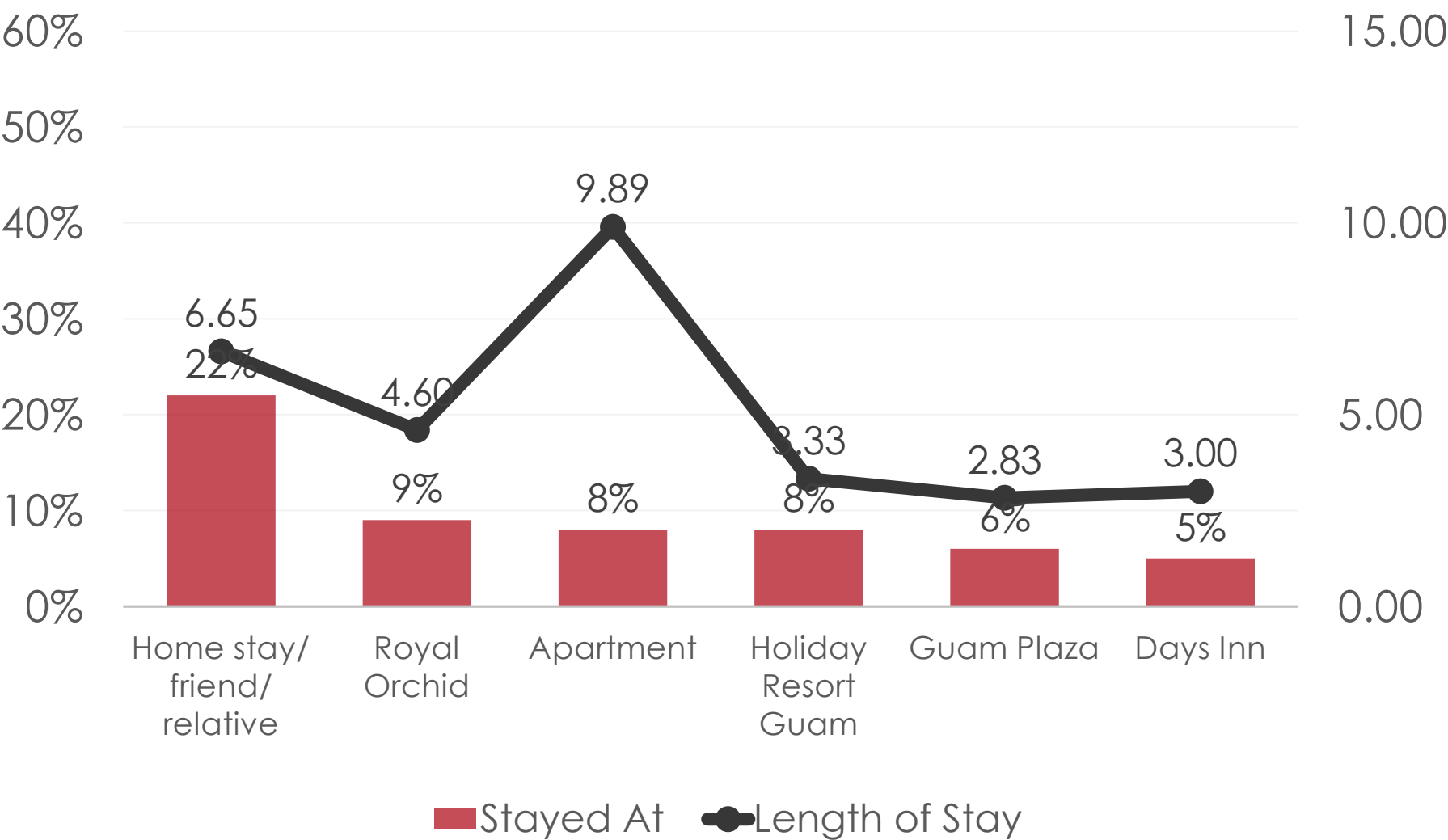
# Prepaid Package Trip



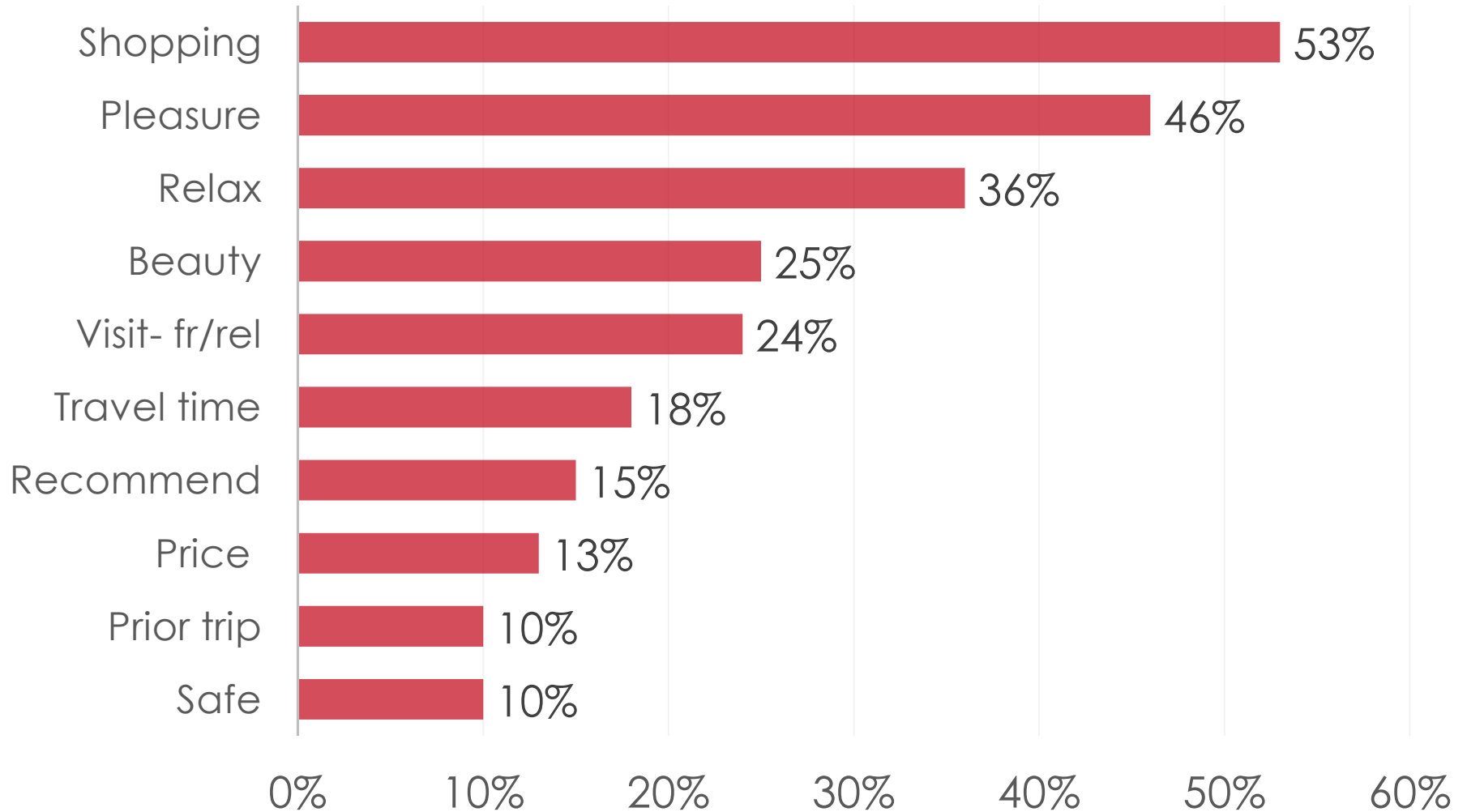
# Prepaid Package Trip



# 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	53%		52%	59%	53%
Pleasure/ vacation	46%		54%	44%	46%
Just to relax	36%		43%	38%	34%
Beautiful seas, beaches, tropical climate	25%		30%	26%	24%
To visit friends or relatives	24%		23%	25%	26%
Short travel time (not too far from home)	18%		16%	18%	18%
Recommendation of friend/ relative/ travel agency	15%		14%	16%	13%
Price of the tour package	13%		12%	13%	15%
A previous visit	10%		9%	10%	12%
It is a safe place to spend a vacation	10%		7%	6%	12%
Adventure	4%		4%	3%	4%
Scuba diving	3%		2%	3%	4%
Company/ business trip	3%		1%		1%
Water sports (snorkeling, windsurfing, parasailing)	1%		1%		
To golf	1%				1%
Career certification/ testing	1%			1%	
Honeymoon	1%		1%		1%
Total	110		94	87	68

Prepared by Anthology Research

# SECTION 3

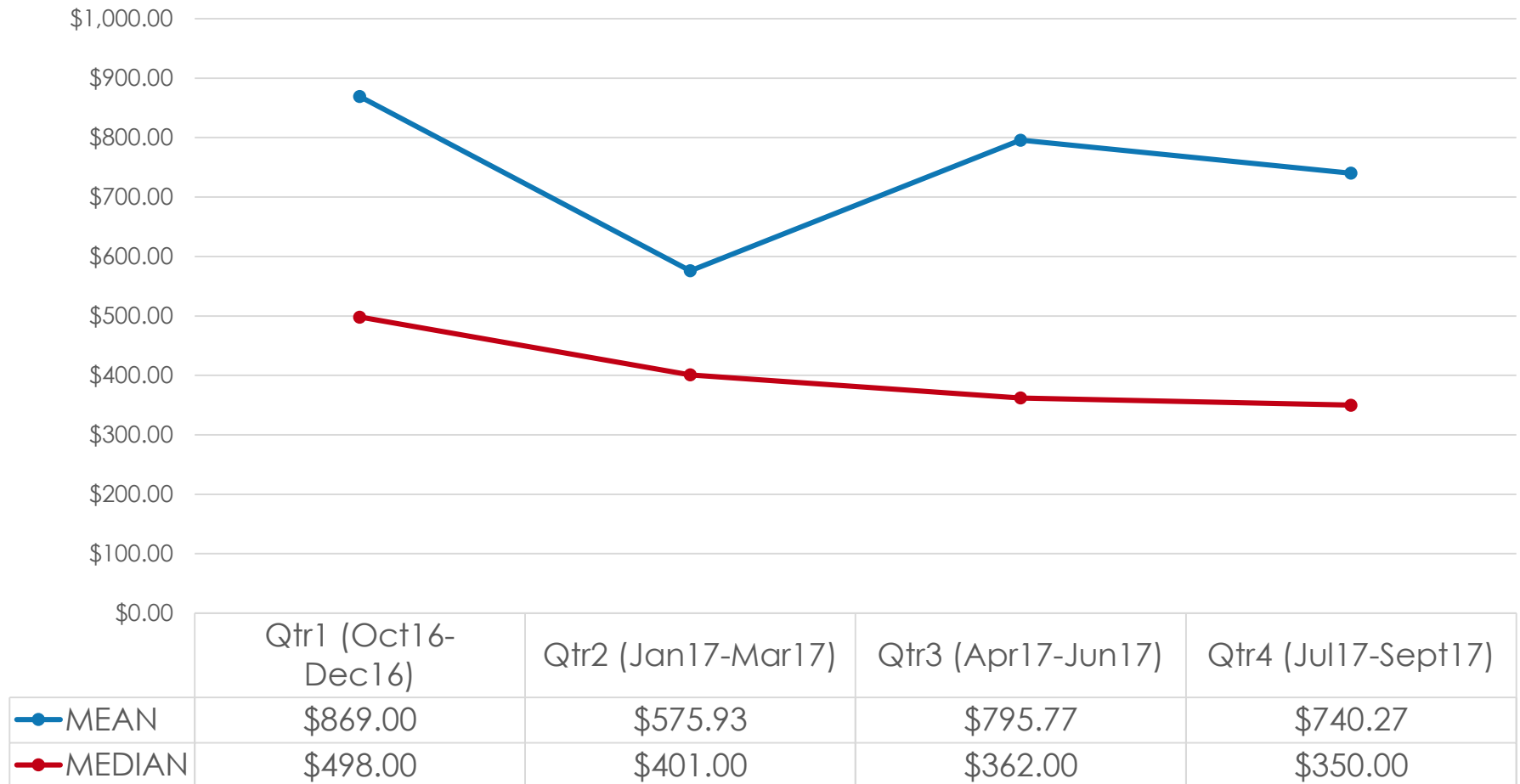
# EXPENDITURES

# Prepaid Expenditures

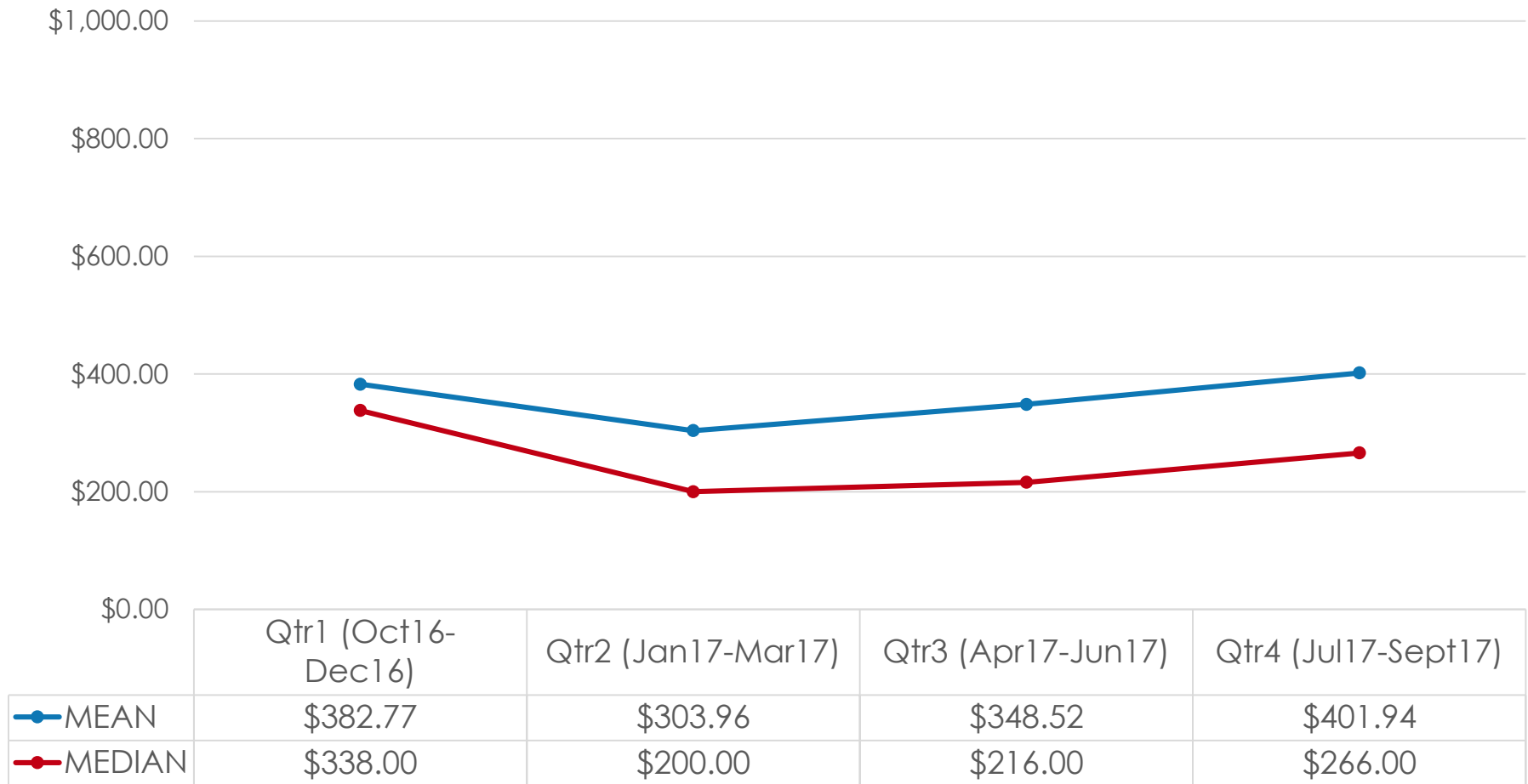
EXCHANGE RATE Peso 50.76=\$1

- \$740.27 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$401.94 = overall mean average per person prepaid expenditures

# Prepaid Entire Travel Party – FY2017 Tracking



# Prepaid Per Person– FY2017 Tracking



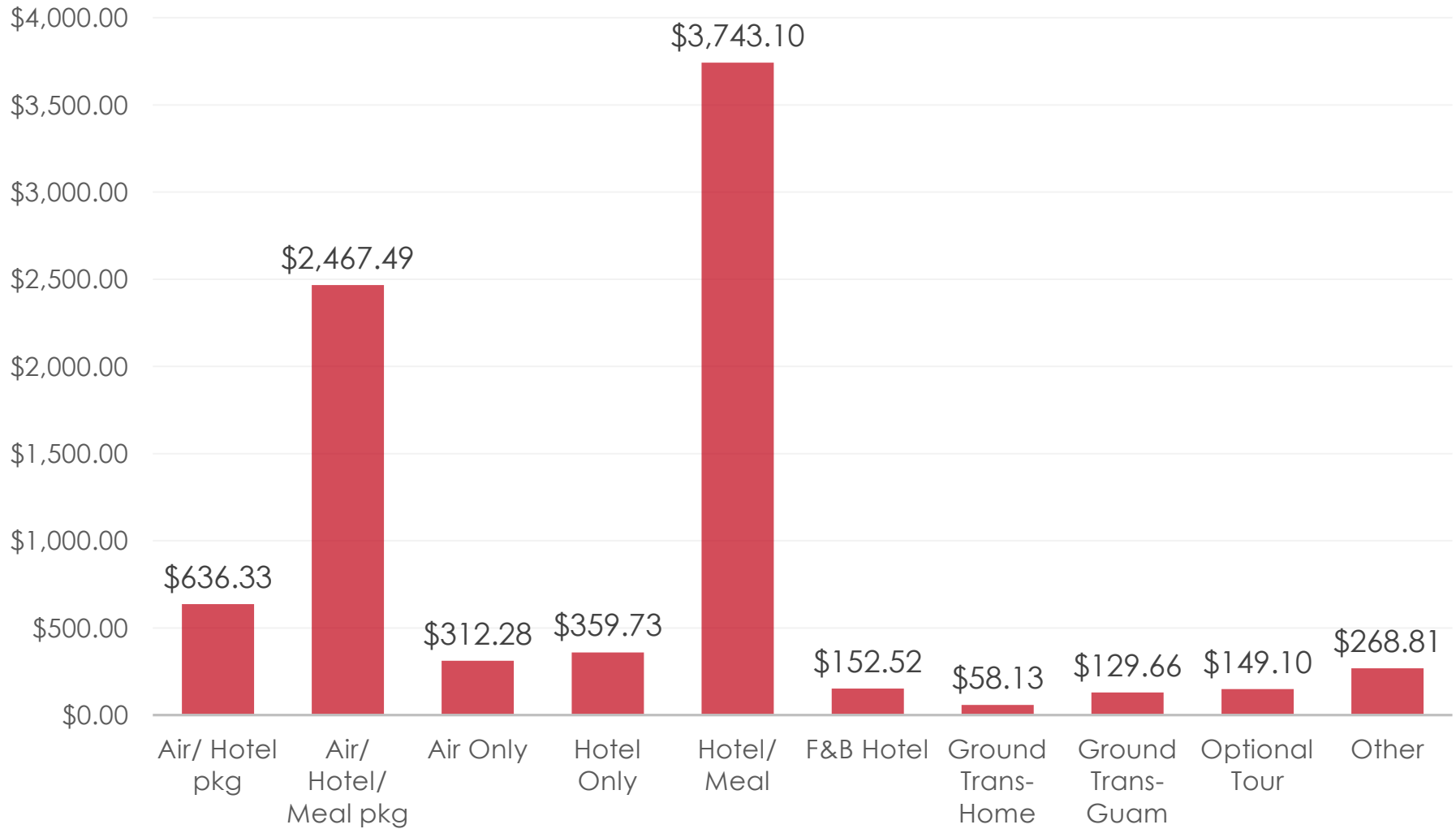
# Prepaid Per Person– Key Segments

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

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
PREPAID PP	Mean	\$401.94	.	\$414.21	\$367.97	\$386.62
	Median	\$266	.	\$266	\$269	\$275

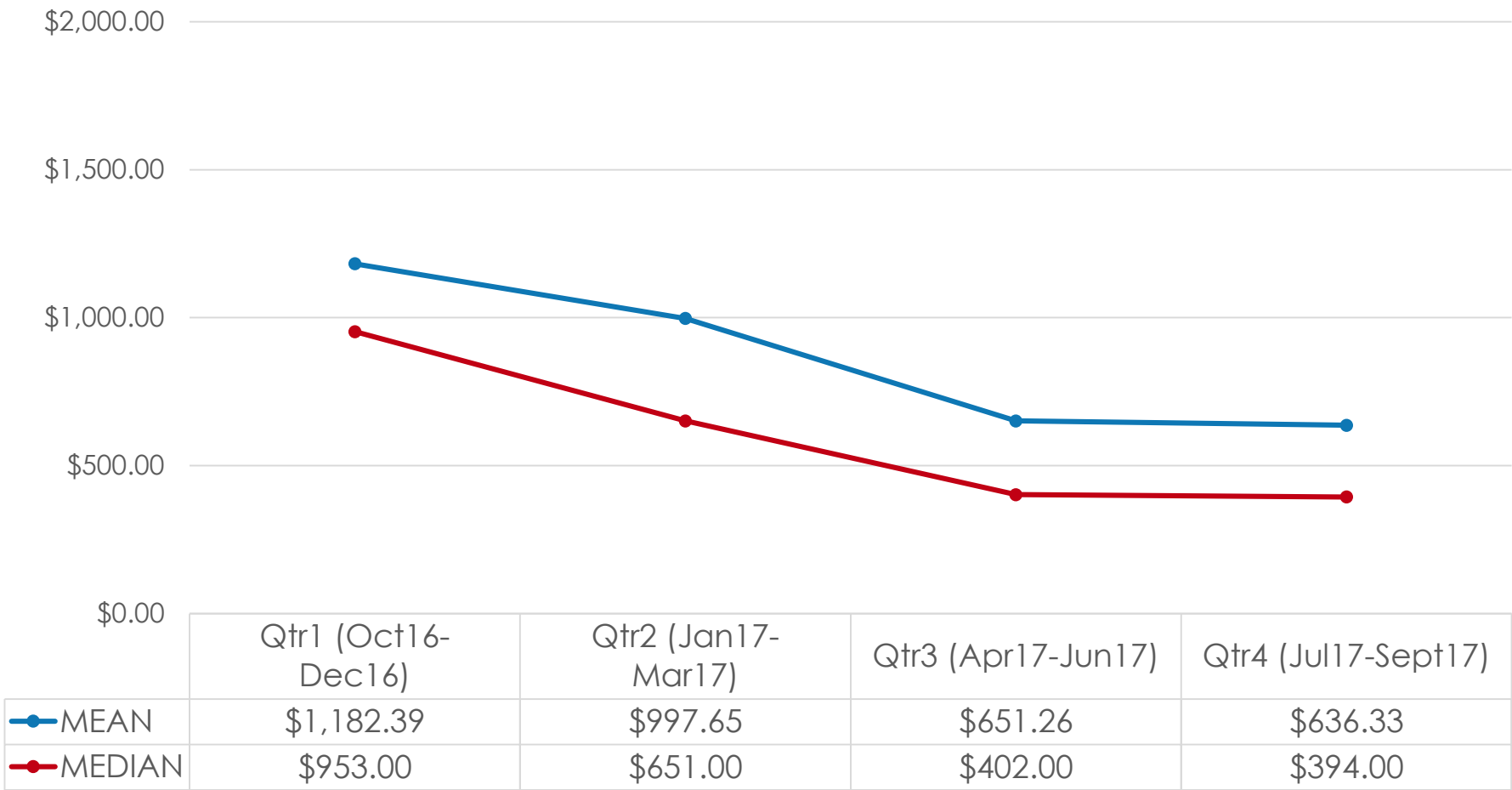
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# Prepaid Expenses by Category – MEAN Entire Travel Party



# Prepaid– FY2017 Tracking

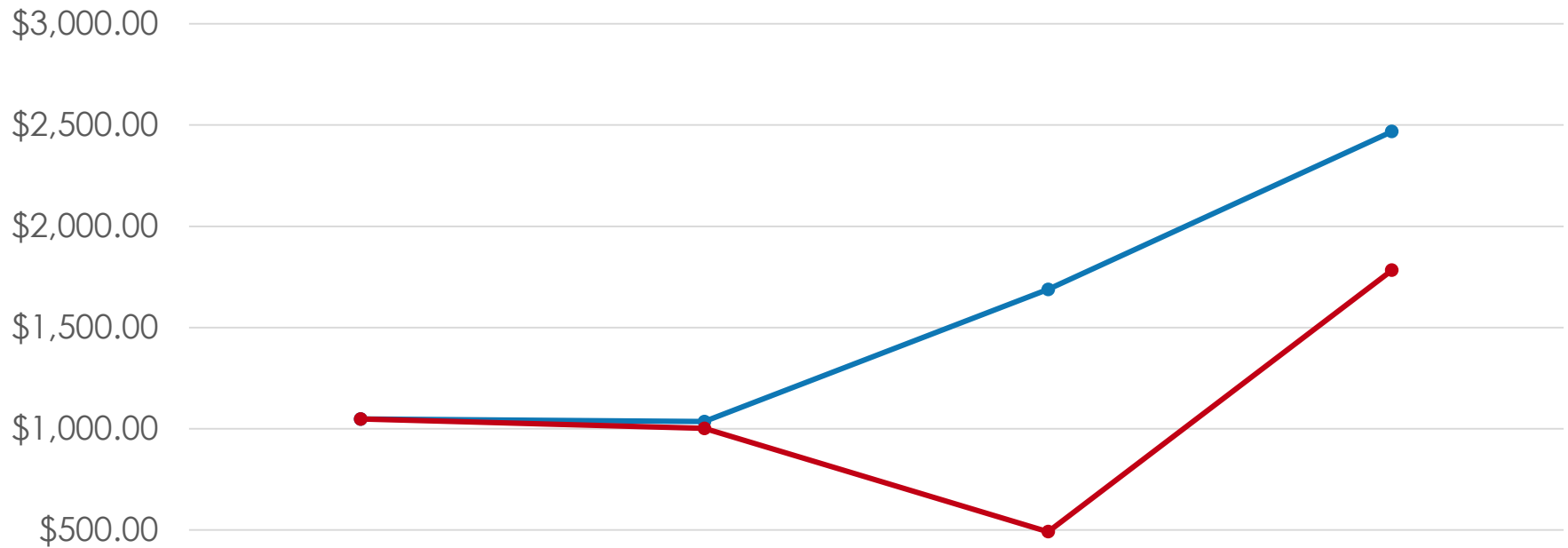
## Airfare & Accommodation Packages





# Prepaid– FY2017 Tracking

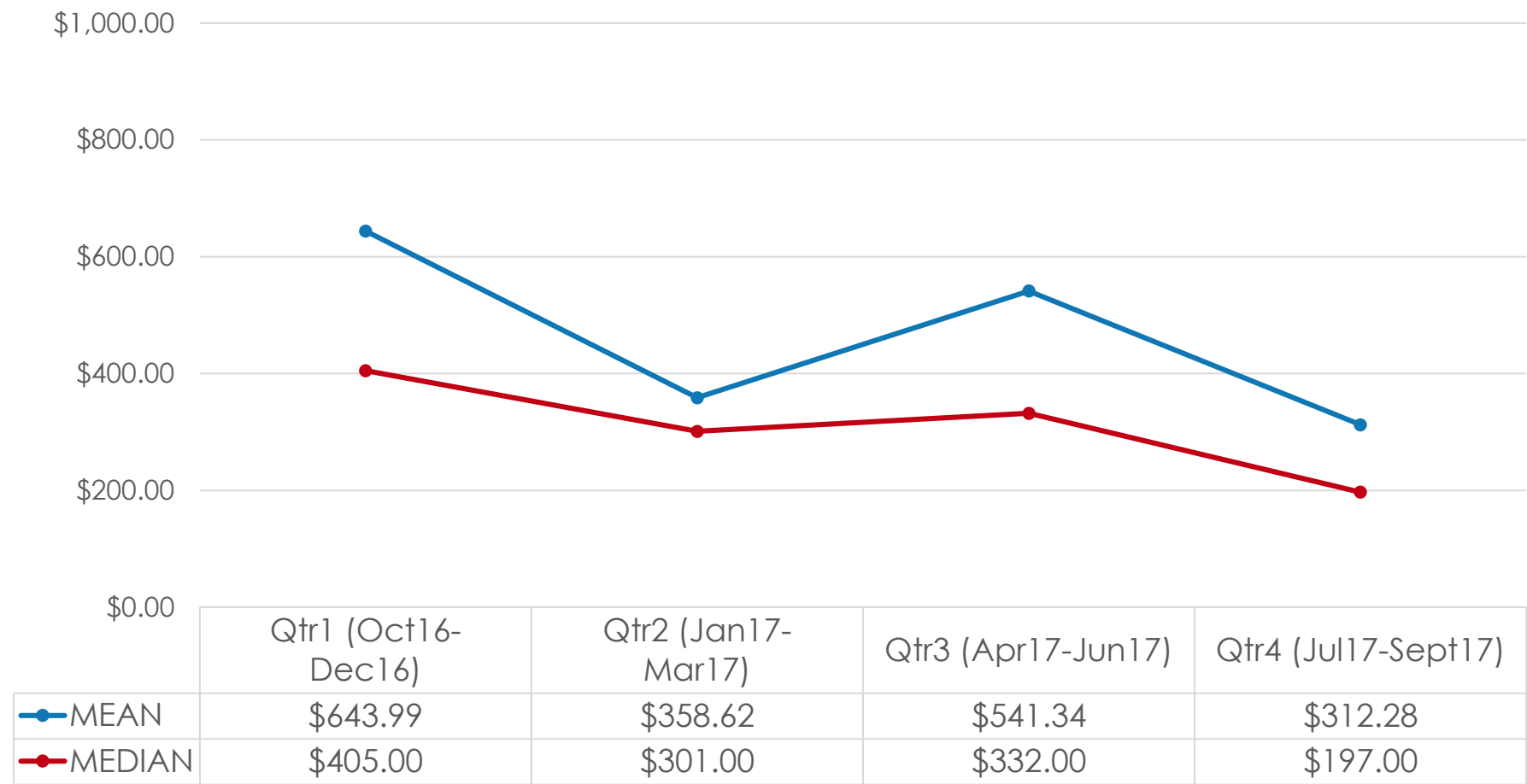
## Airfare & Accommodation W/ Meal Packages



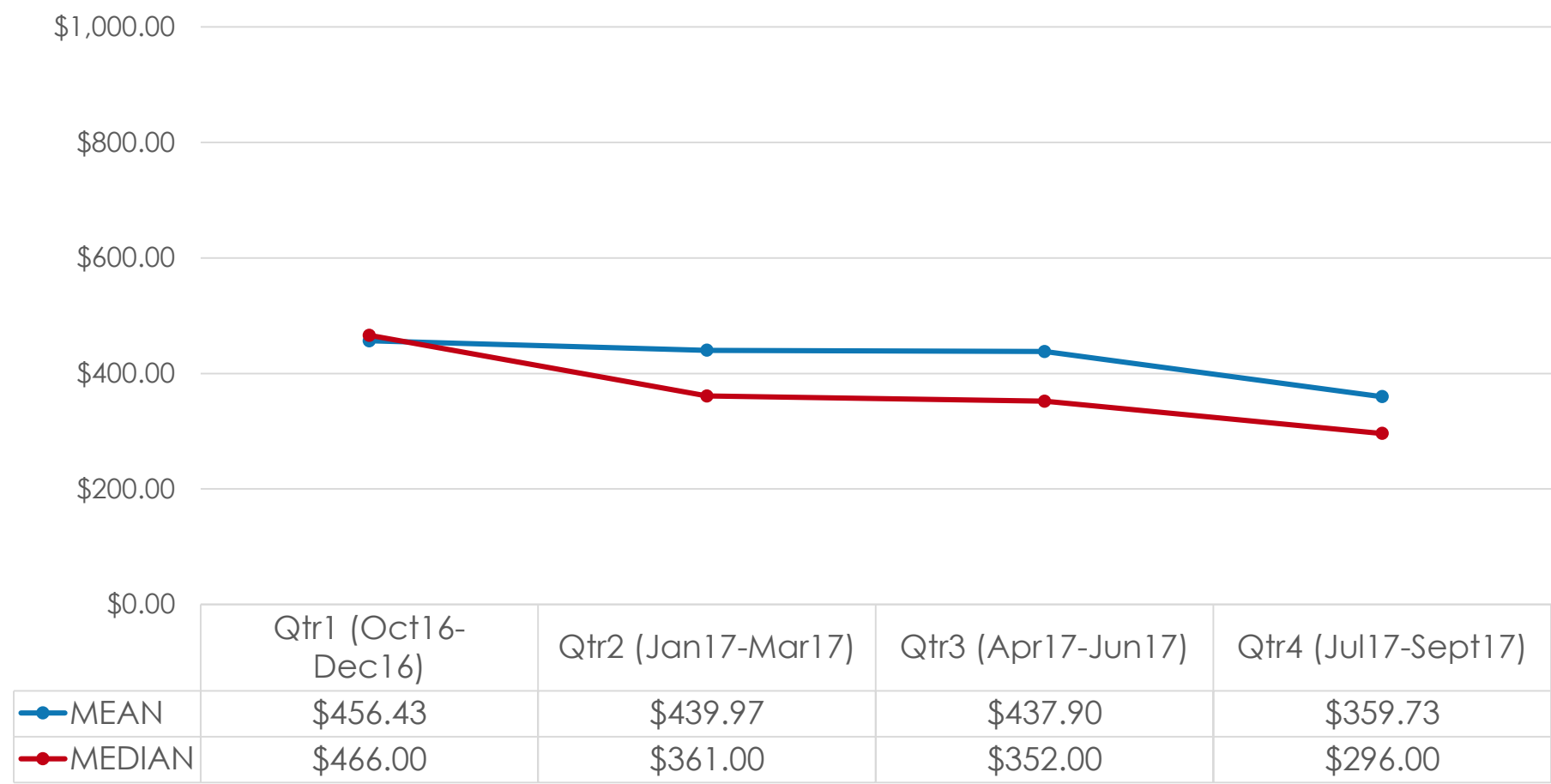
	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	\$1,048.00	\$1,035.61	\$1,687.87	\$2,467.49
MEDIAN	\$1,048.00	\$1,002.00	\$492.00	\$1,783.00

# Prepaid– FY2017 Tracking

## Airfare Only

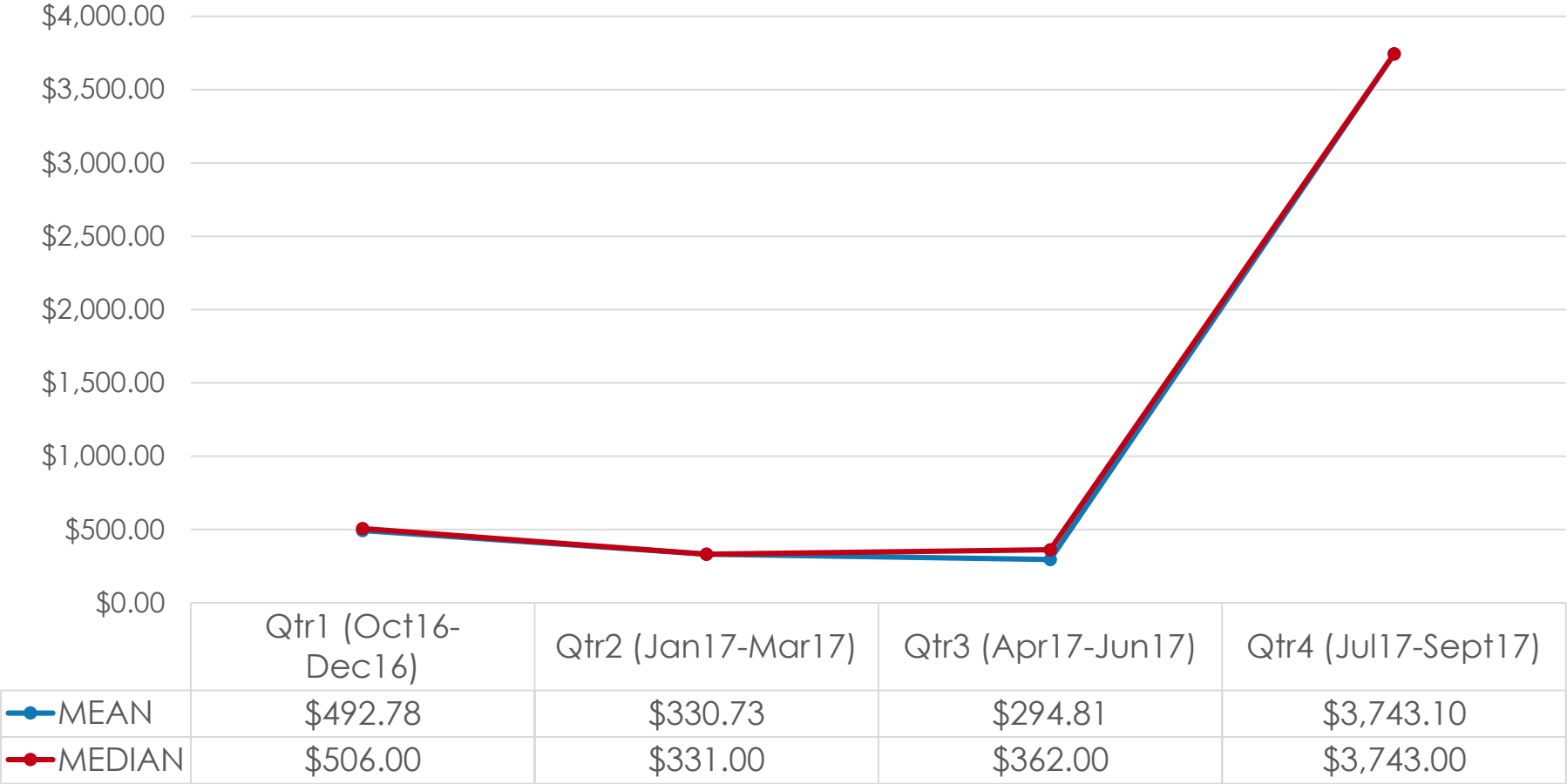


# Prepaid– FY2017 Tracking Accommodations Only



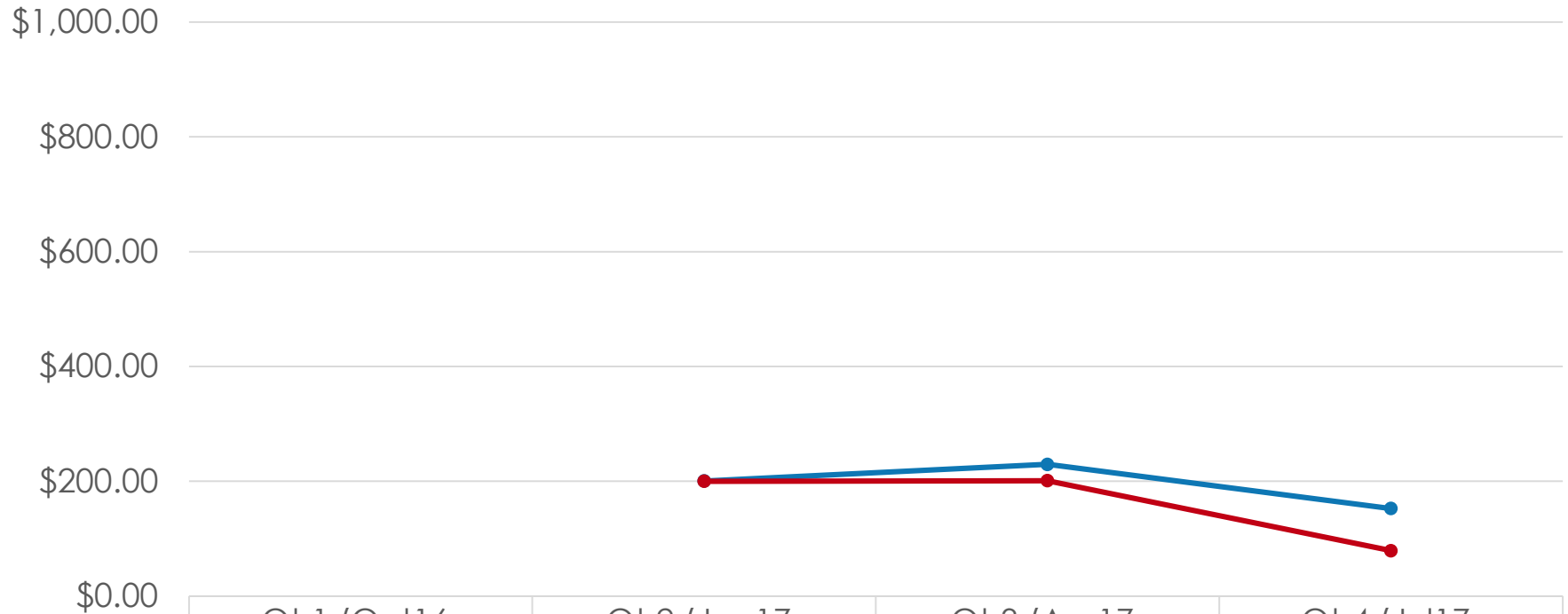
# Prepaid– FY2017 Tracking

## Accommodations w/ Meal Only



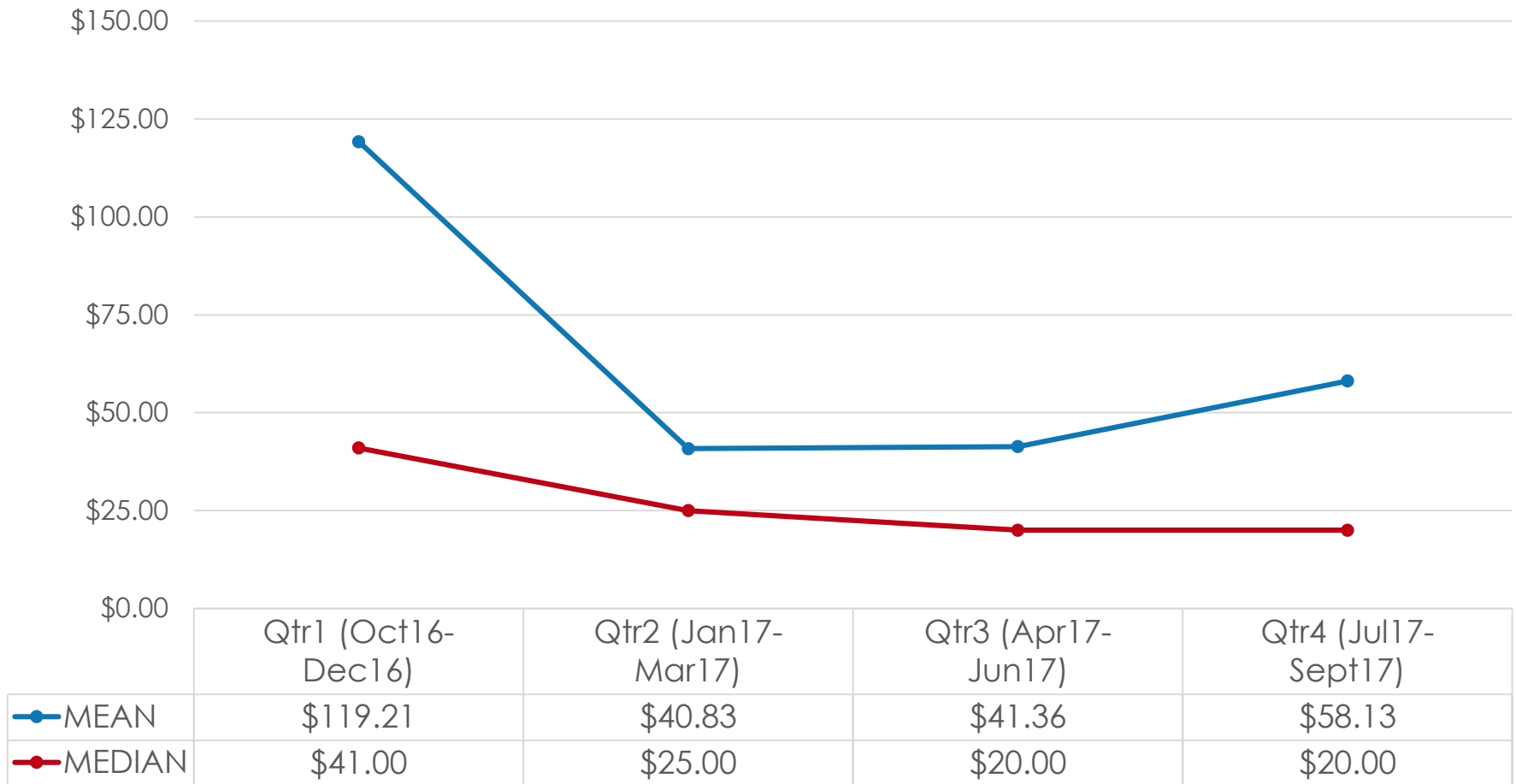
# Prepaid– FY2017 Tracking

## Food & Beverage in Hotel



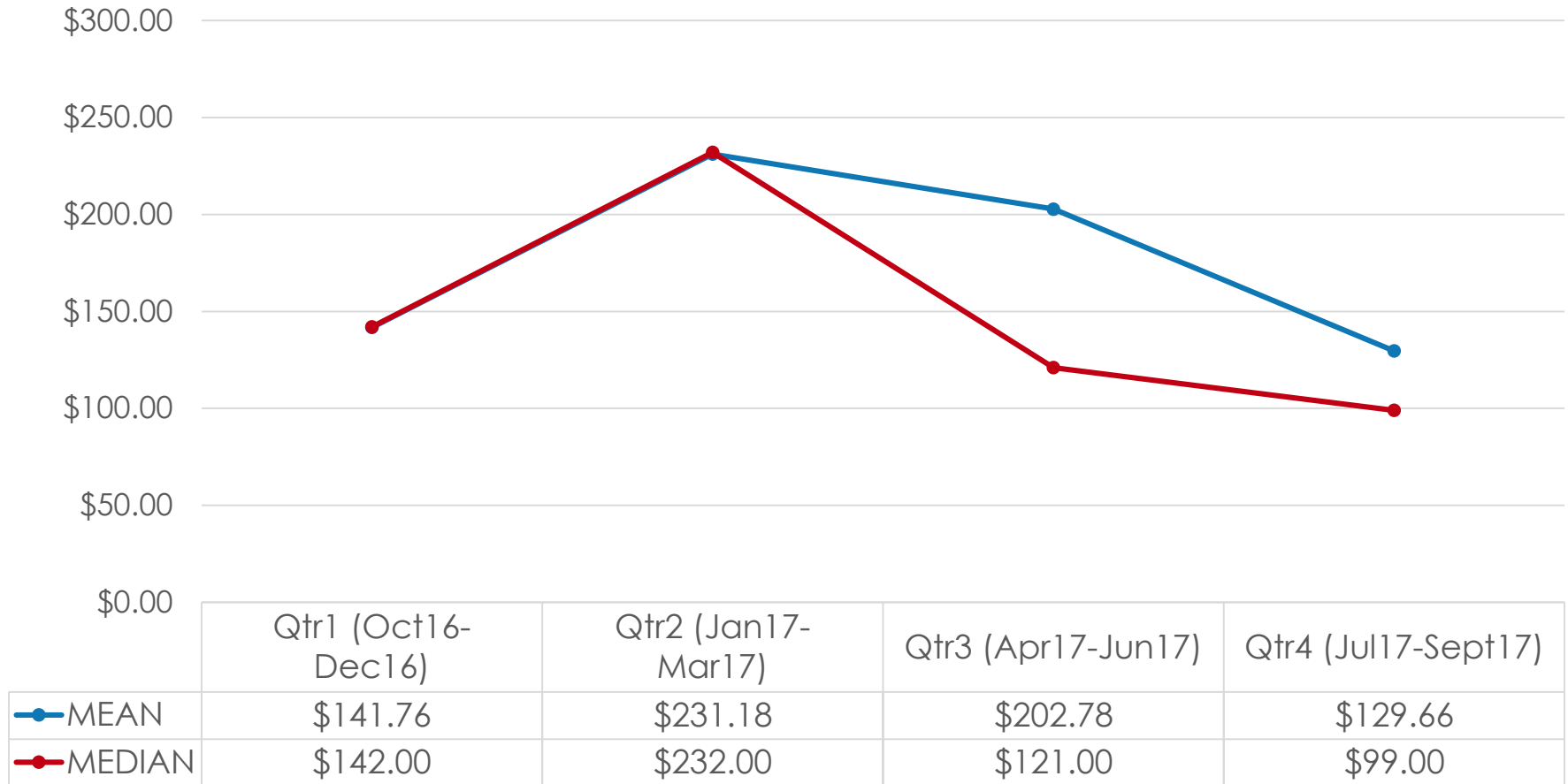
# Prepaid– FY2017 Tracking

## Ground Transportation - Philippines



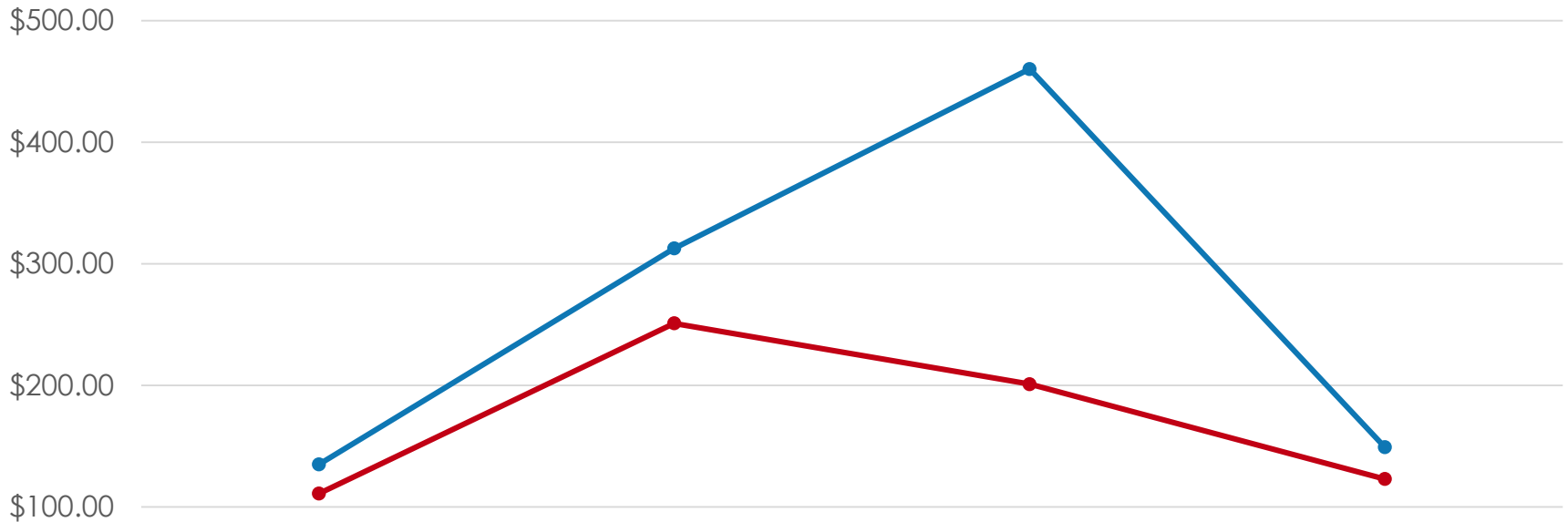
# Prepaid– FY2017 Tracking

## Ground Transportation - Guam



# Prepaid– FY2017 Tracking

## Optional tours/ Activities



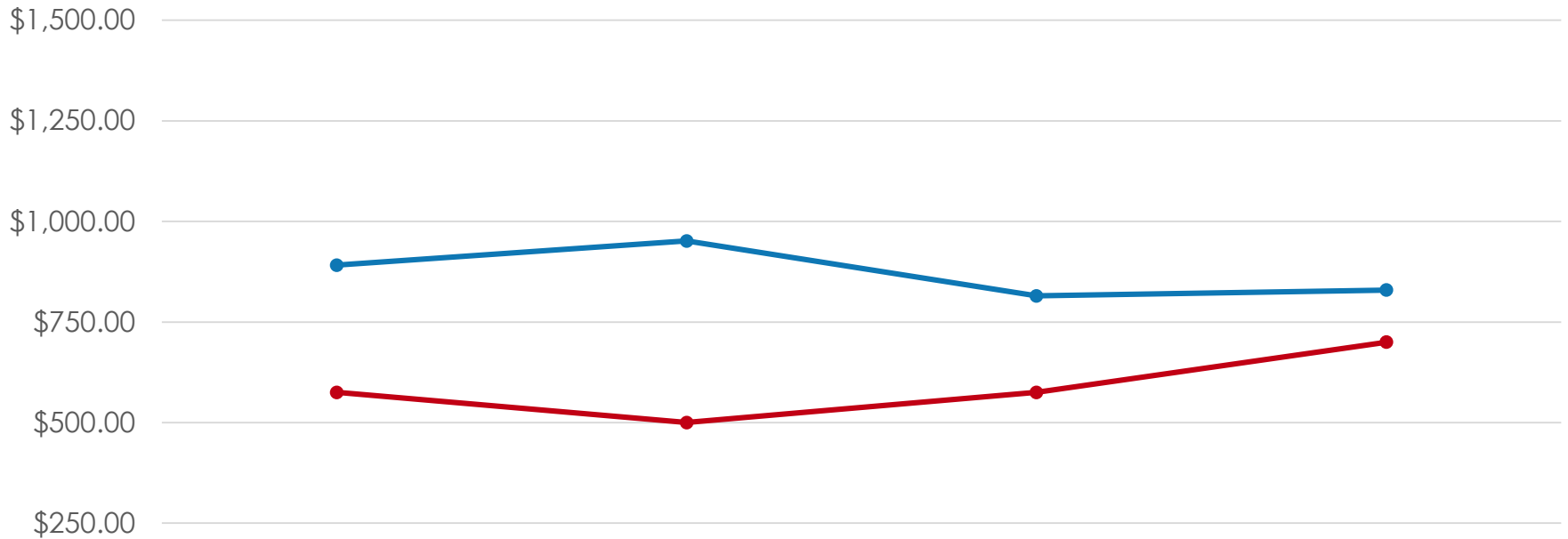
	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	\$135.01	\$312.69	\$460.30	\$149.10
MEDIAN	\$111.00	\$251.00	\$201.00	\$123.00



# On-Island Expenditures

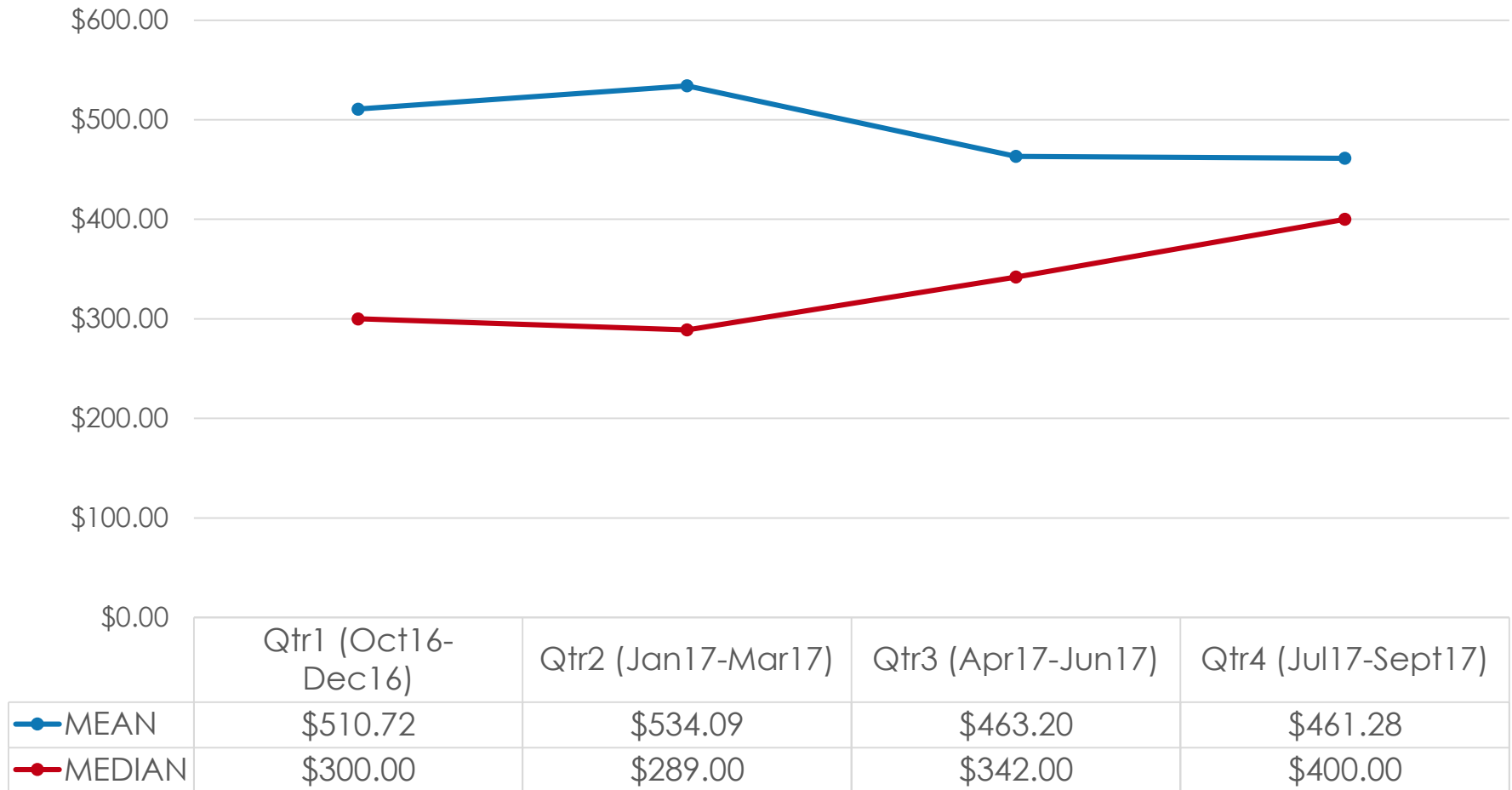
- \$829.28 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$461.28 = overall mean average per person prepaid expenditures

# On-Island Entire Travel Party – FY2017 Tracking



	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	\$891.21	\$951.50	\$815.00	\$829.28
MEDIAN	\$575.00	\$500.00	\$575.00	\$700.00

# On-Island Per Person – FY2017 Tracking



# On-Island Per Person – Key Segments

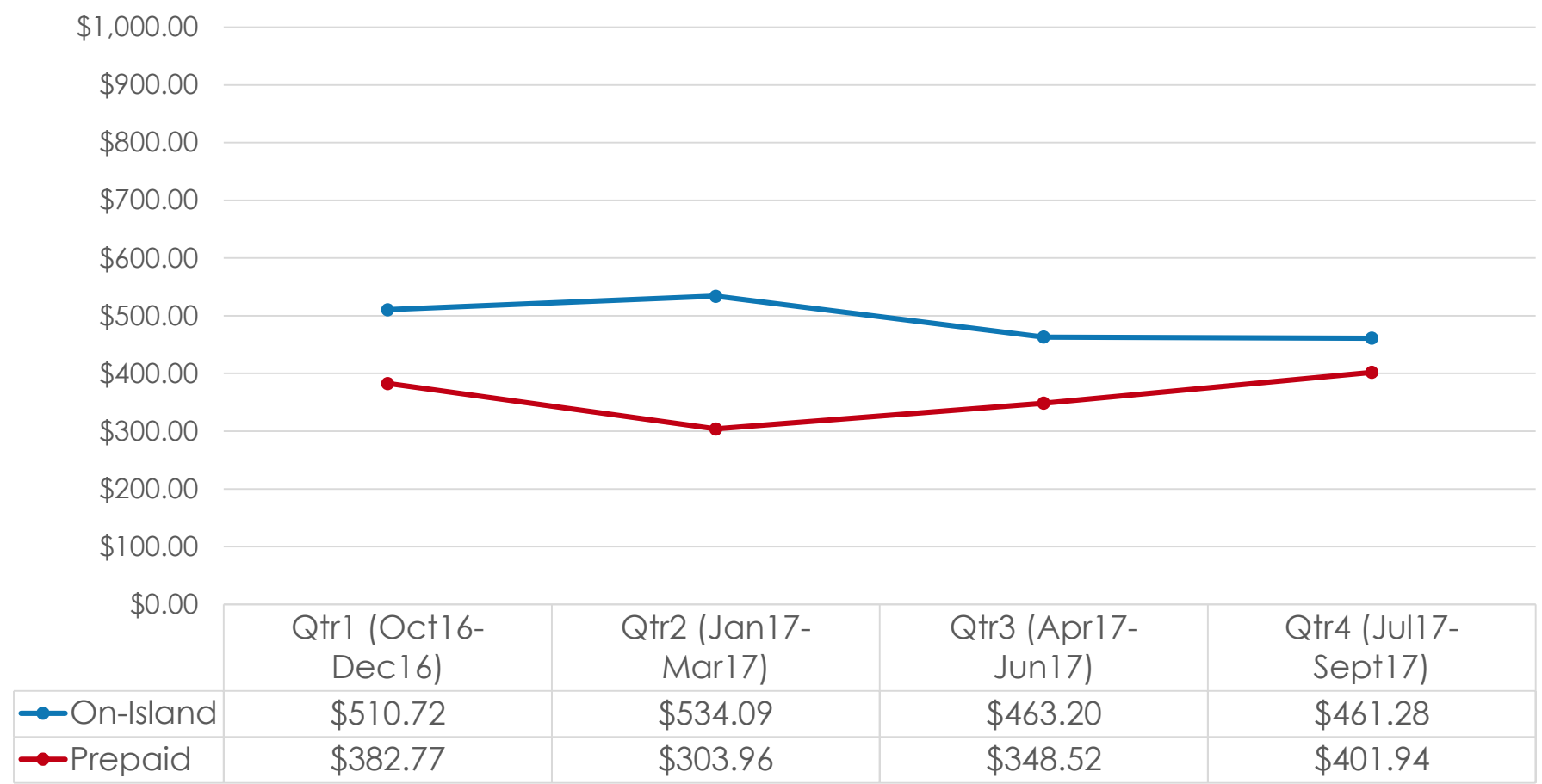
**GVB EXIT SURVEY**  
**Q11A ONISLE EXPENDITURE- PER PERSO**

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
ONISLE PP	Mean	\$461.28	.	\$426.54	\$476.97	\$440.79
	Median	\$400	.	\$400	\$427	\$400

Prepared by Anthology Research

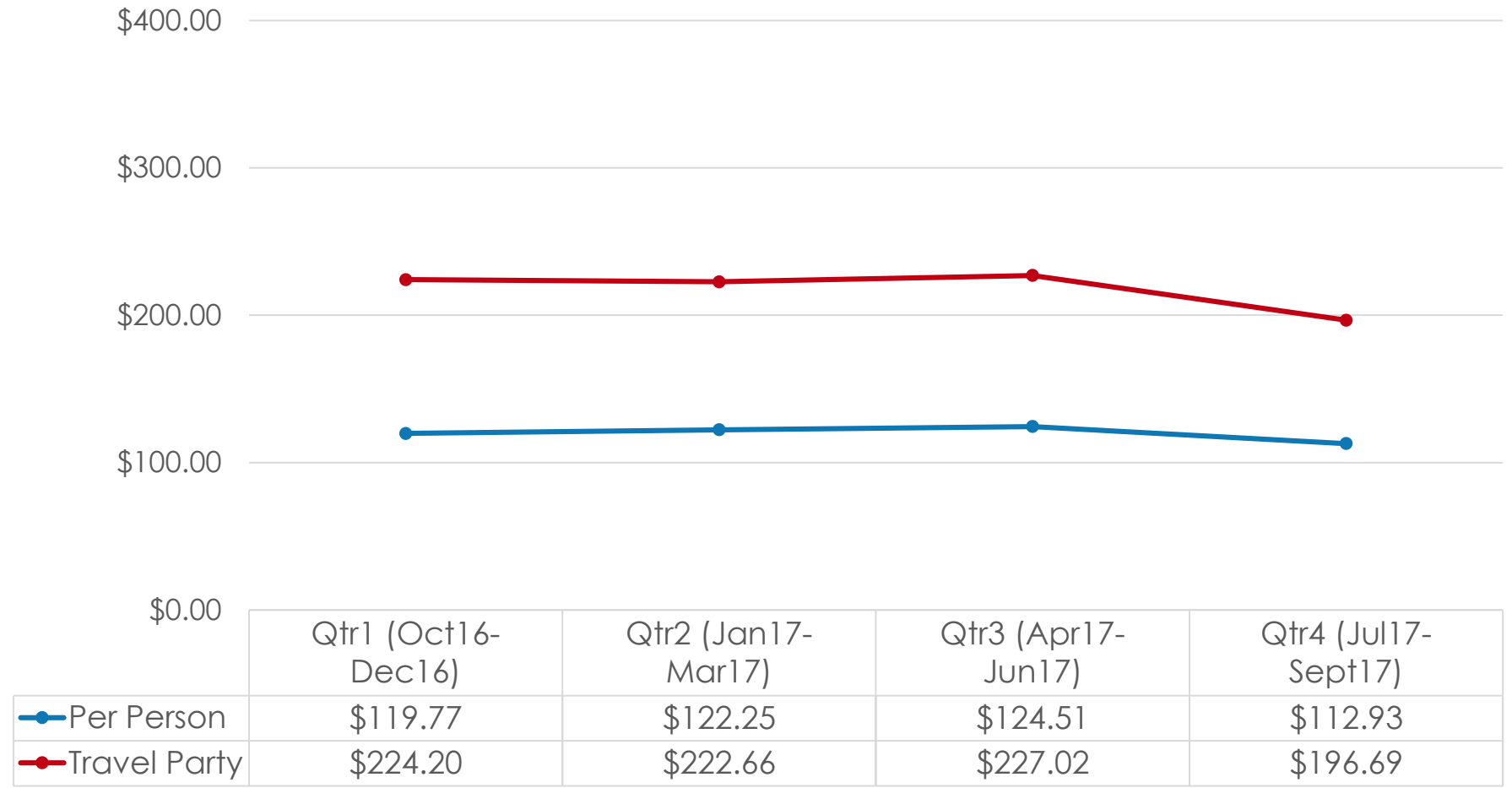
# Per Person MEAN expenditures – FY2017 Tracking

## On-Island/ Prepaid



# On-Island Per Day Spending – FY2017 Tracking

## MEAN

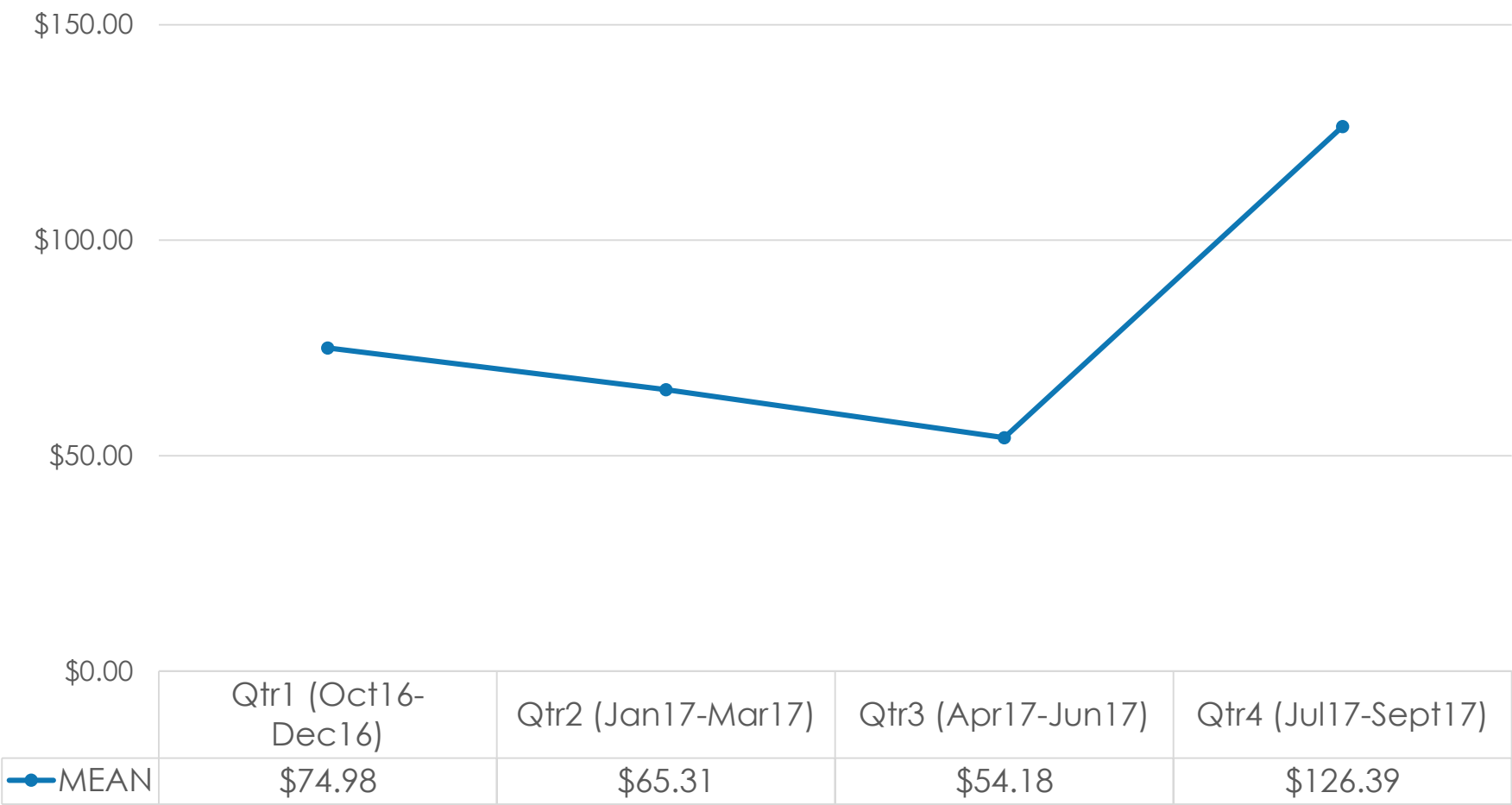


# On-Island Expenses by Category – MEAN Entire Travel Party



# On-Island – FY2017 Tracking

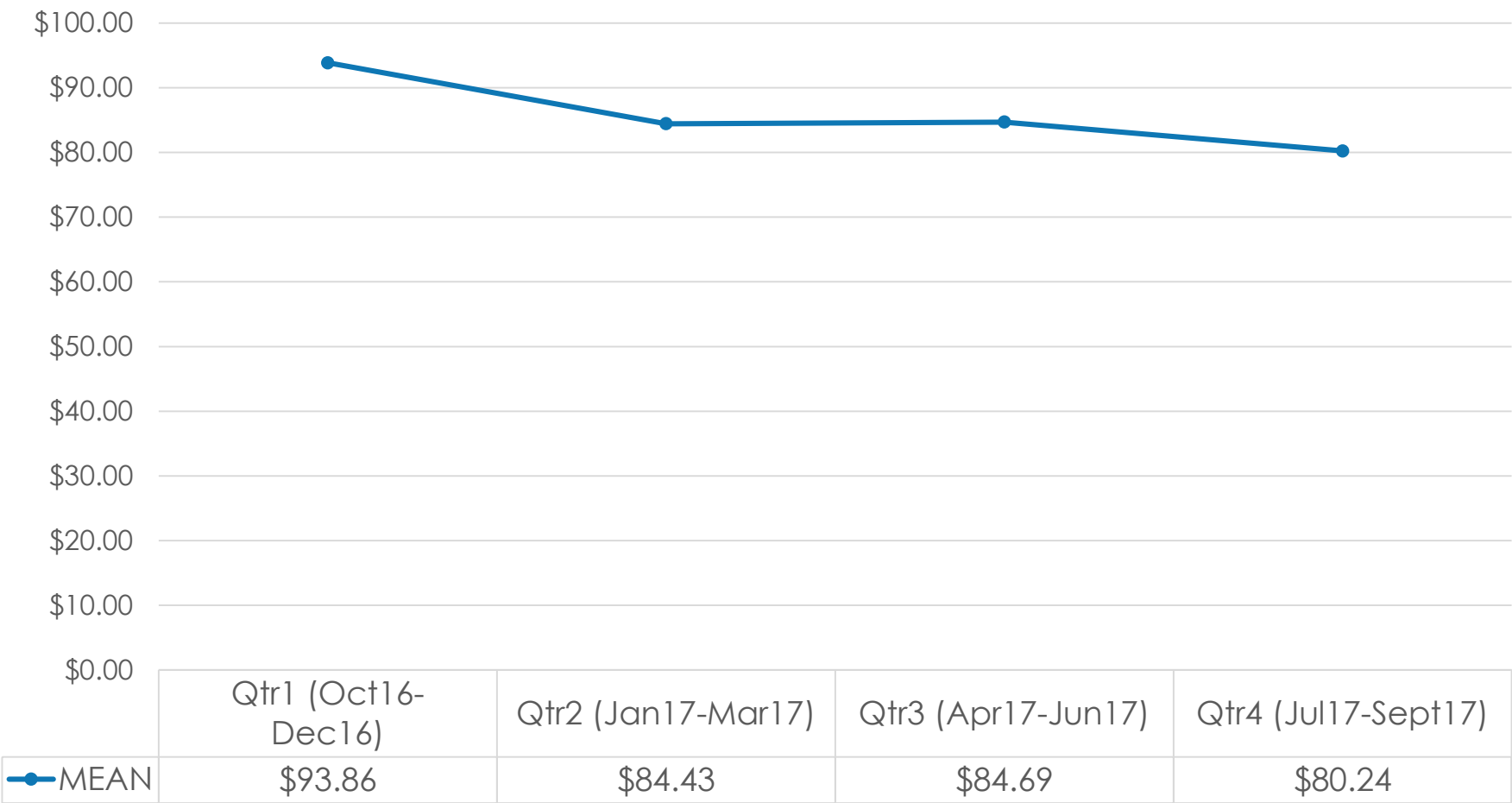
## Food & Beverage - Hotel





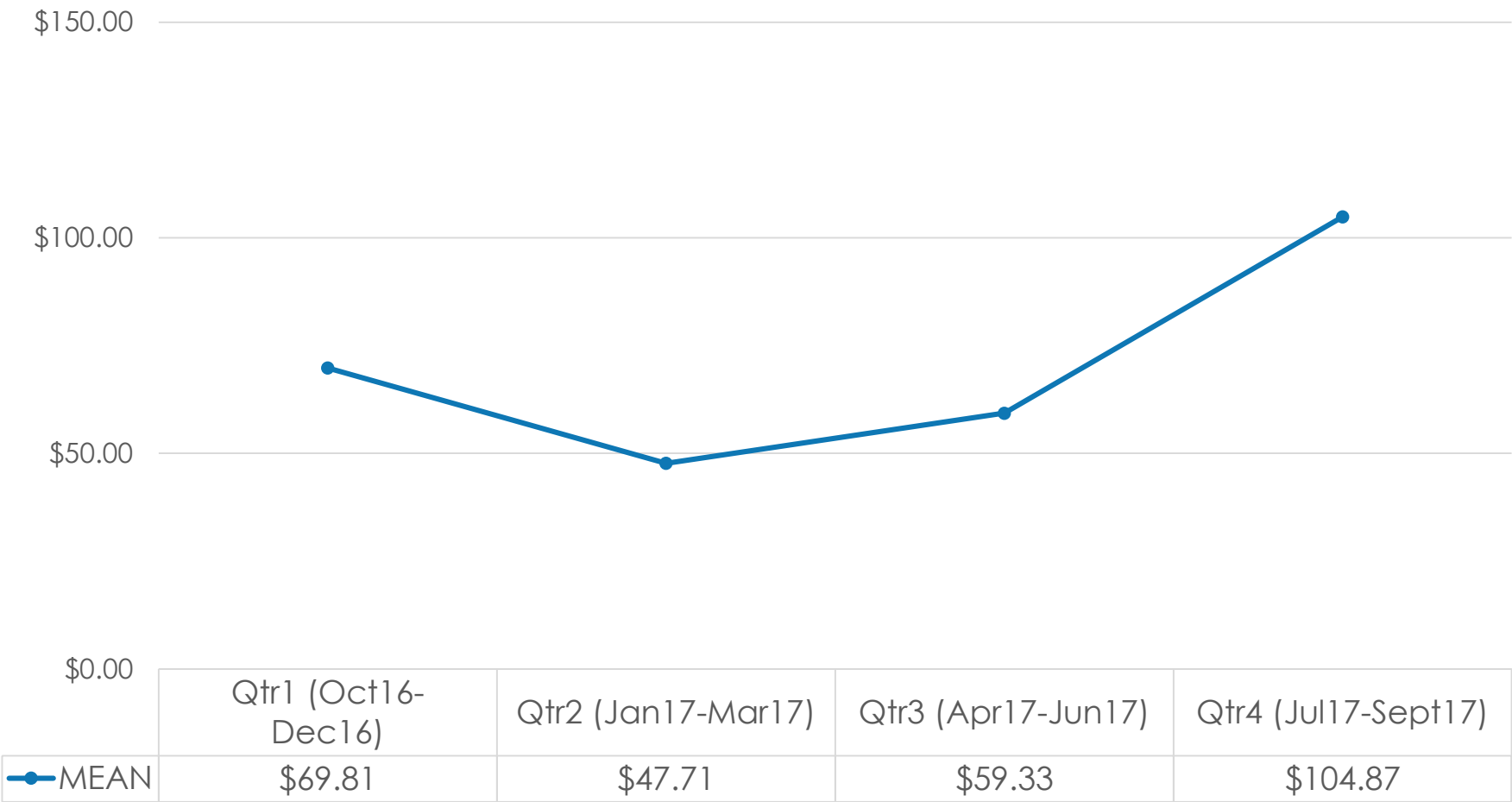
# On-Island – FY2017 Tracking

## Food & Beverage – Fast Food/ Convenience Store



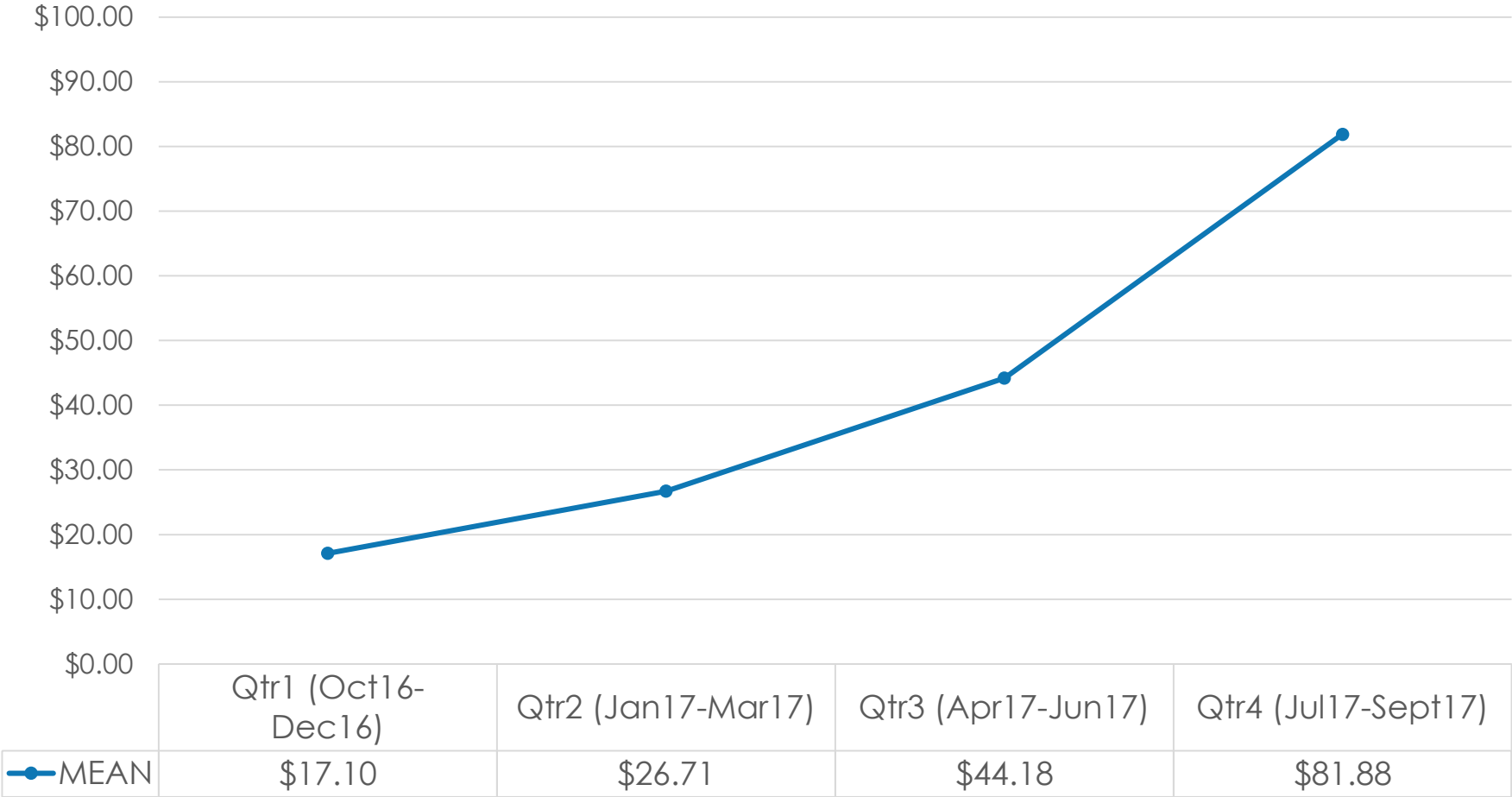
# On-Island – FY2017 Tracking

## Food & Beverage – Restaurant/ Drinking Est Outside Hotel



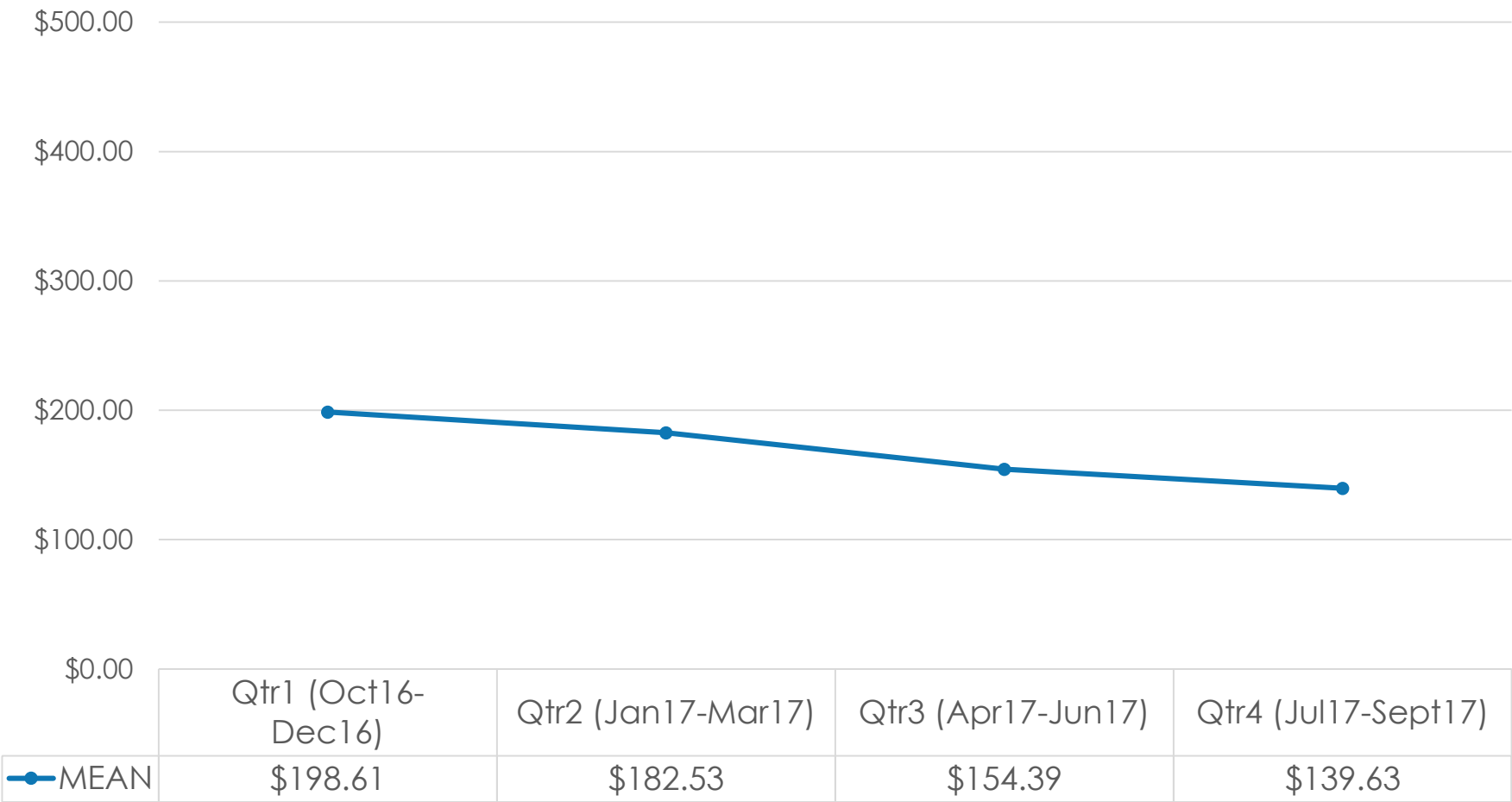
# On-Island – FY2017 Tracking

## Optional tour/ Activities



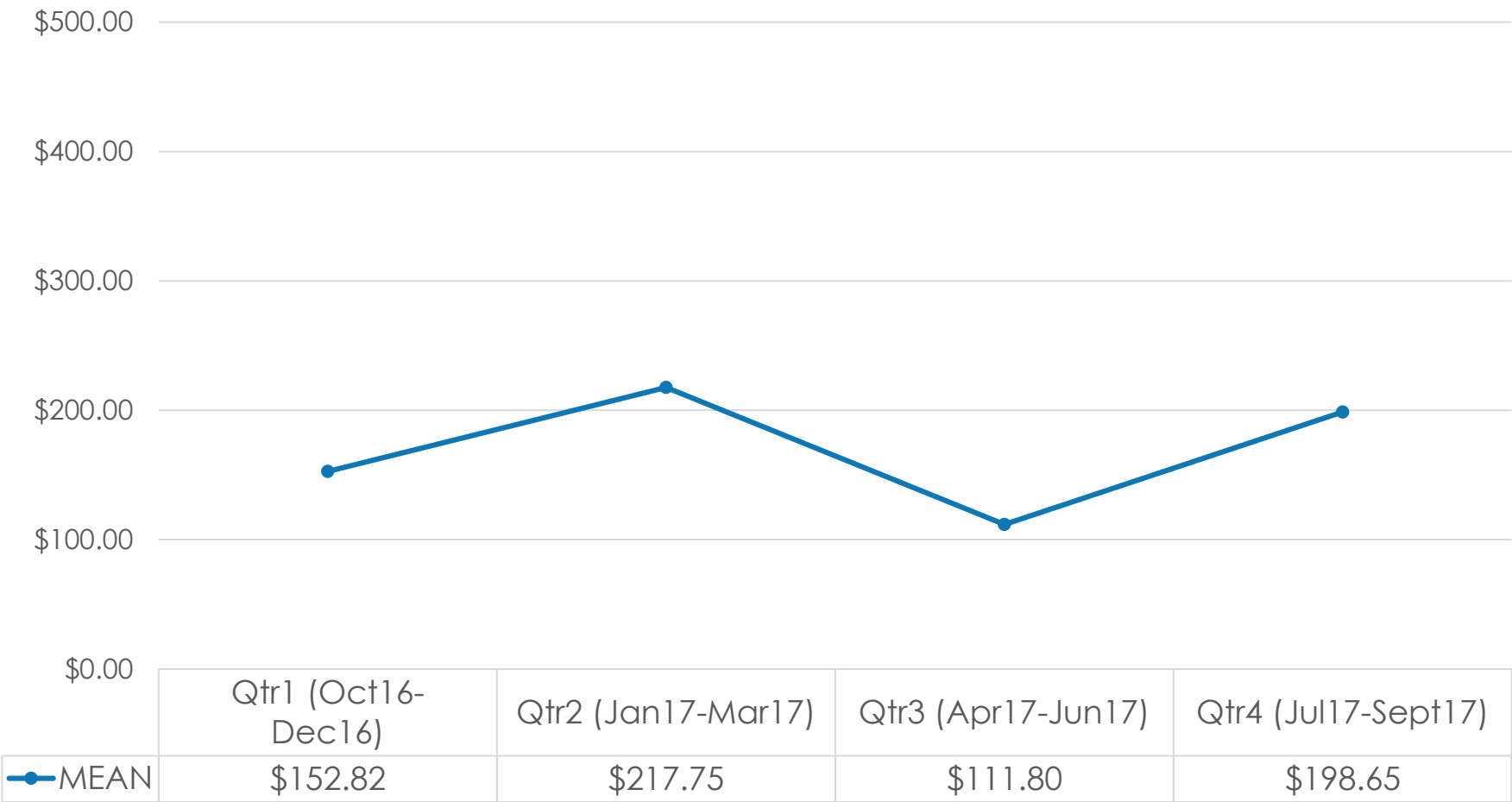
# On-Island – FY2017 Tracking

## Gift/ Souvenir – Self/ Companion



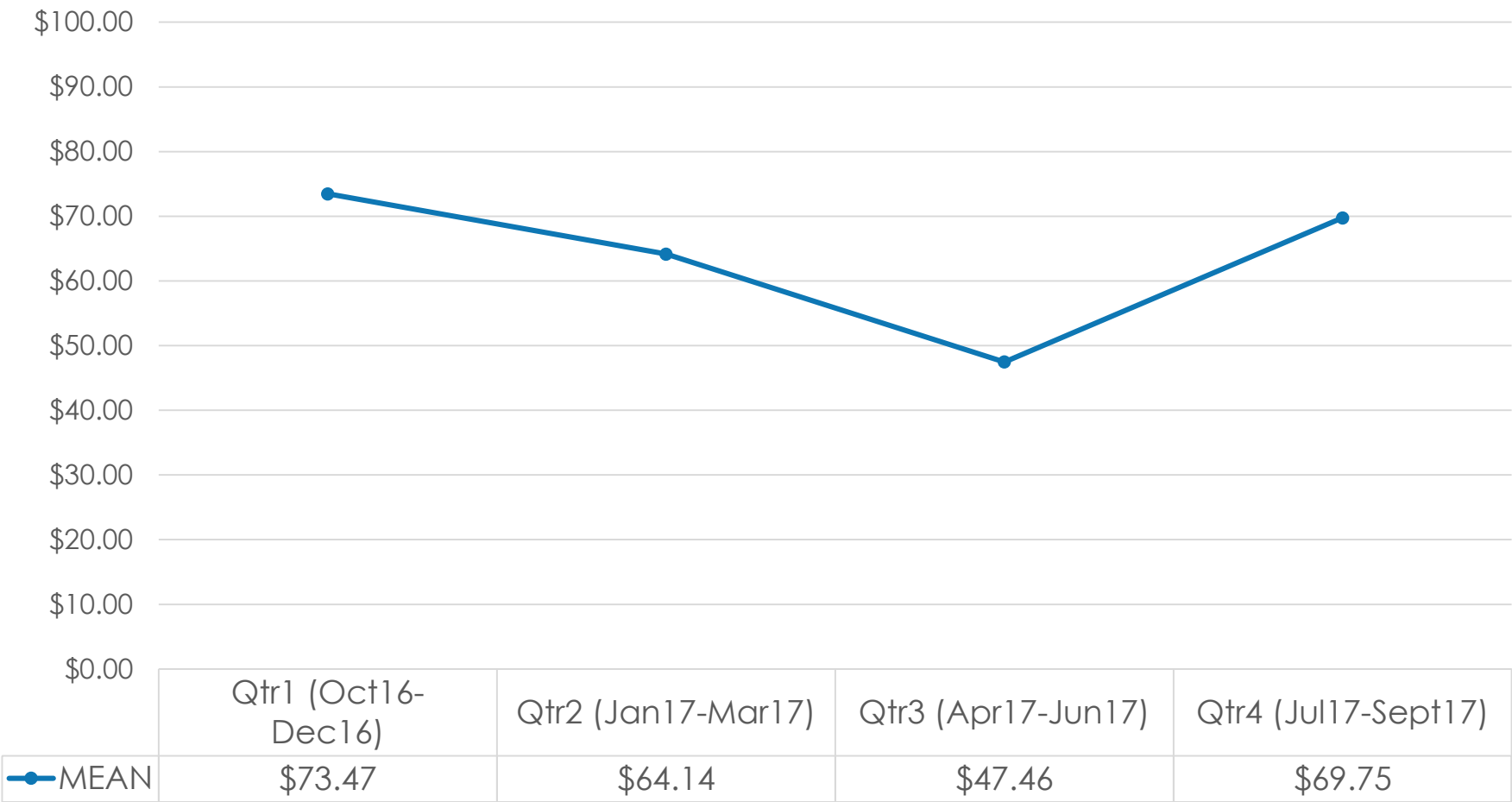
# On-Island – FY2017 Tracking

## Gift/ Souvenir – Friends/ Family



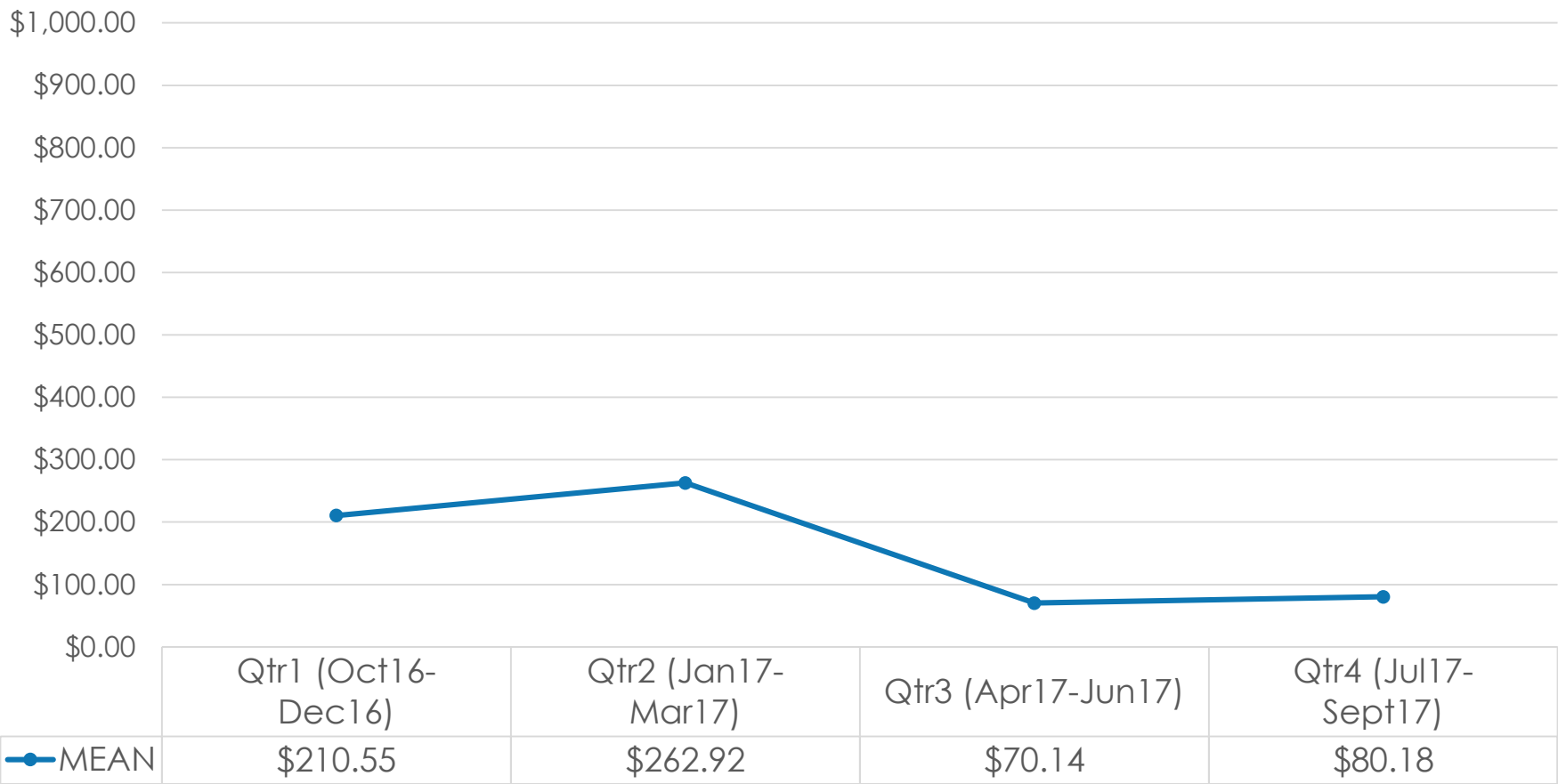
# On-Island – FY2017 Tracking

## Local Transportation



# On-Island – FY2017 Tracking

## Other Not Included

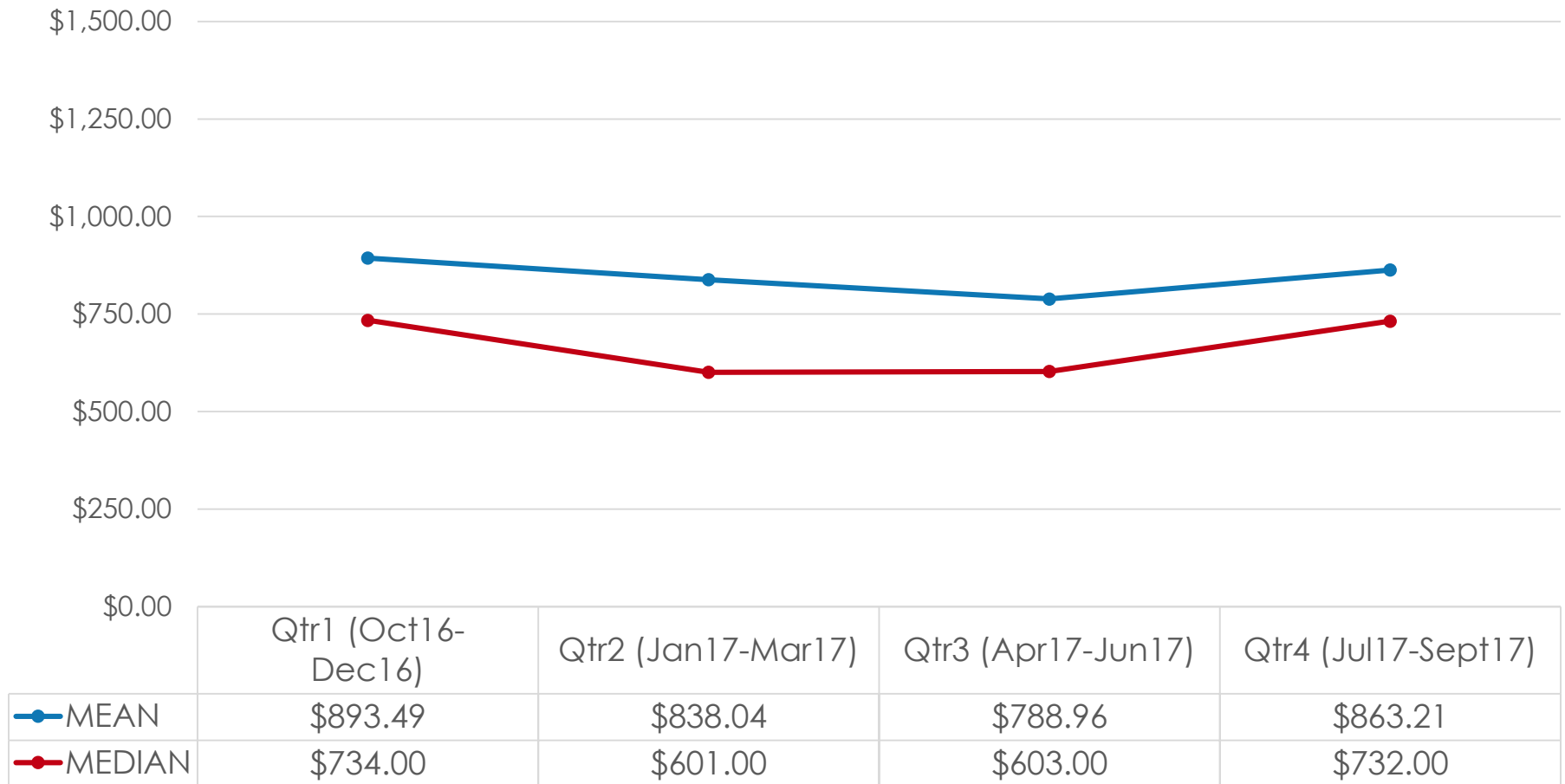


# **TOTAL (On-Isle + Prepaid) Expenditures Per Person**

- \$863.21 = overall mean average prepaid expense by respondent/ Per Person



# TOTAL Per Person Expenditures – FY2017 Tracking



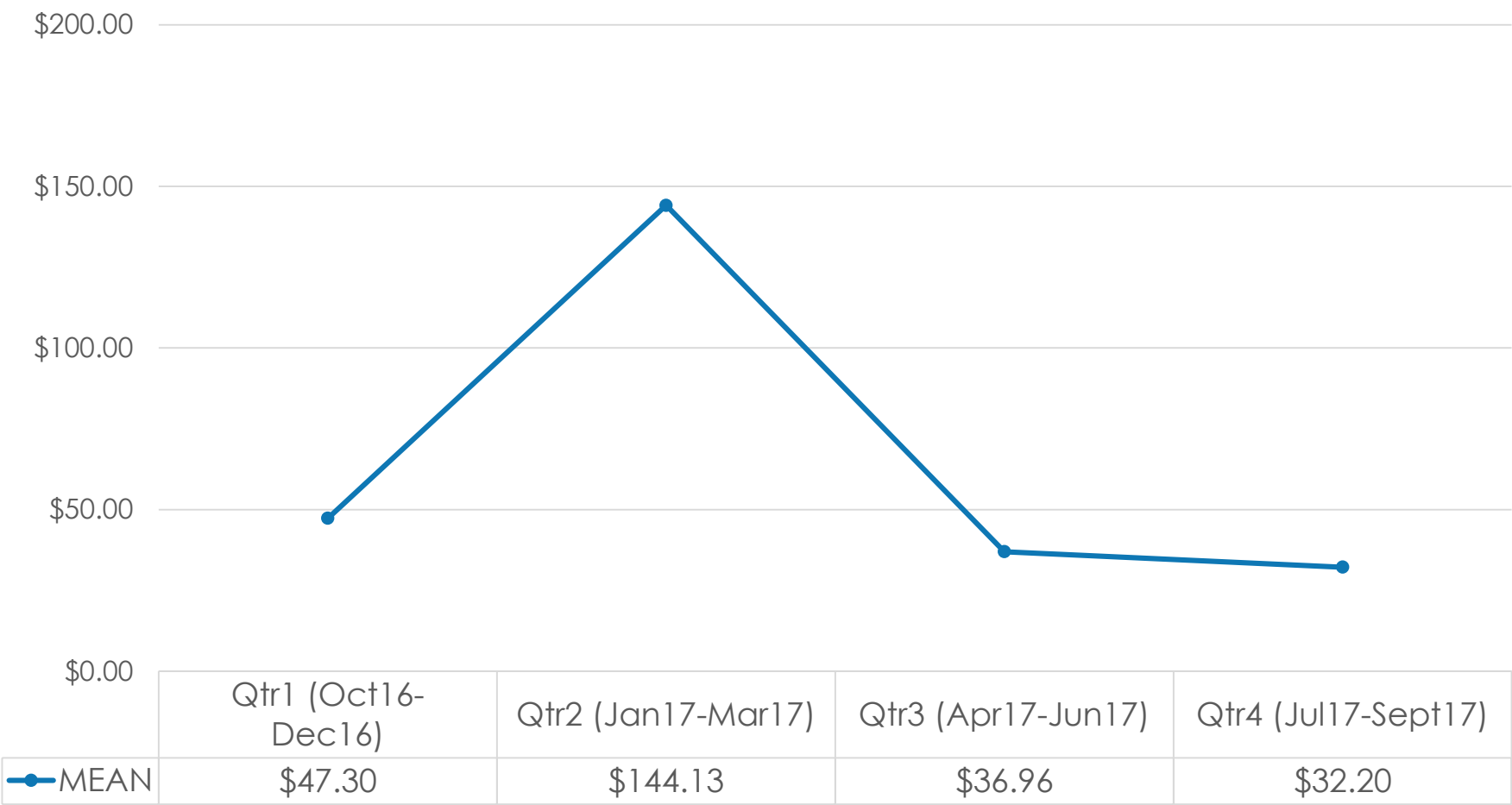
# TOTAL Per Person Expenditures – Key Segments

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

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
TOTAL PP	Mean	\$863.21	.	\$840.75	\$844.95	\$827.41
	Median	\$732	.	\$721	\$743	\$697

Prepared by Anthology Research

# GUAM AIRPORT EXPENDITURE – FY2017 Tracking

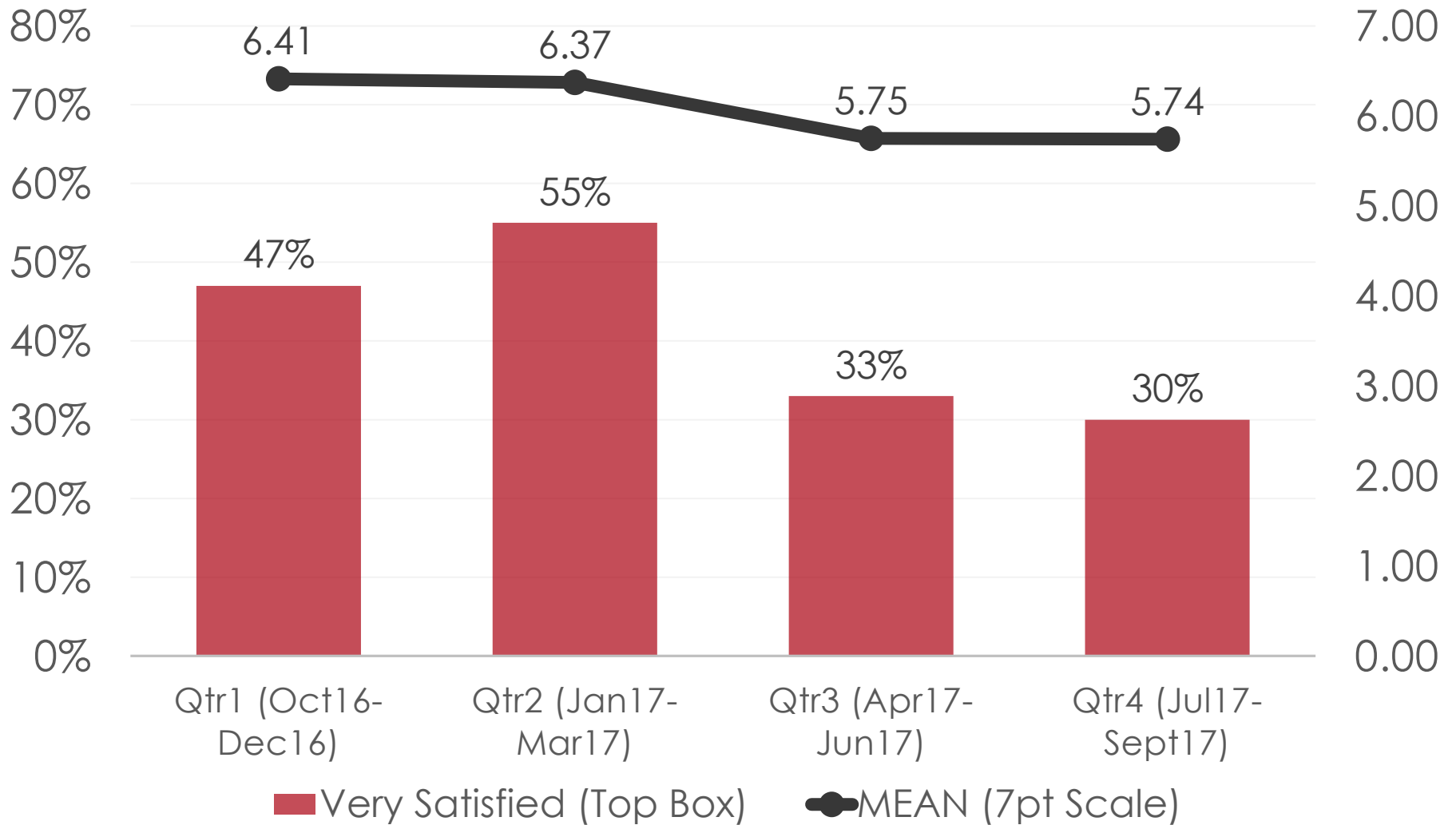


# SECTION 4

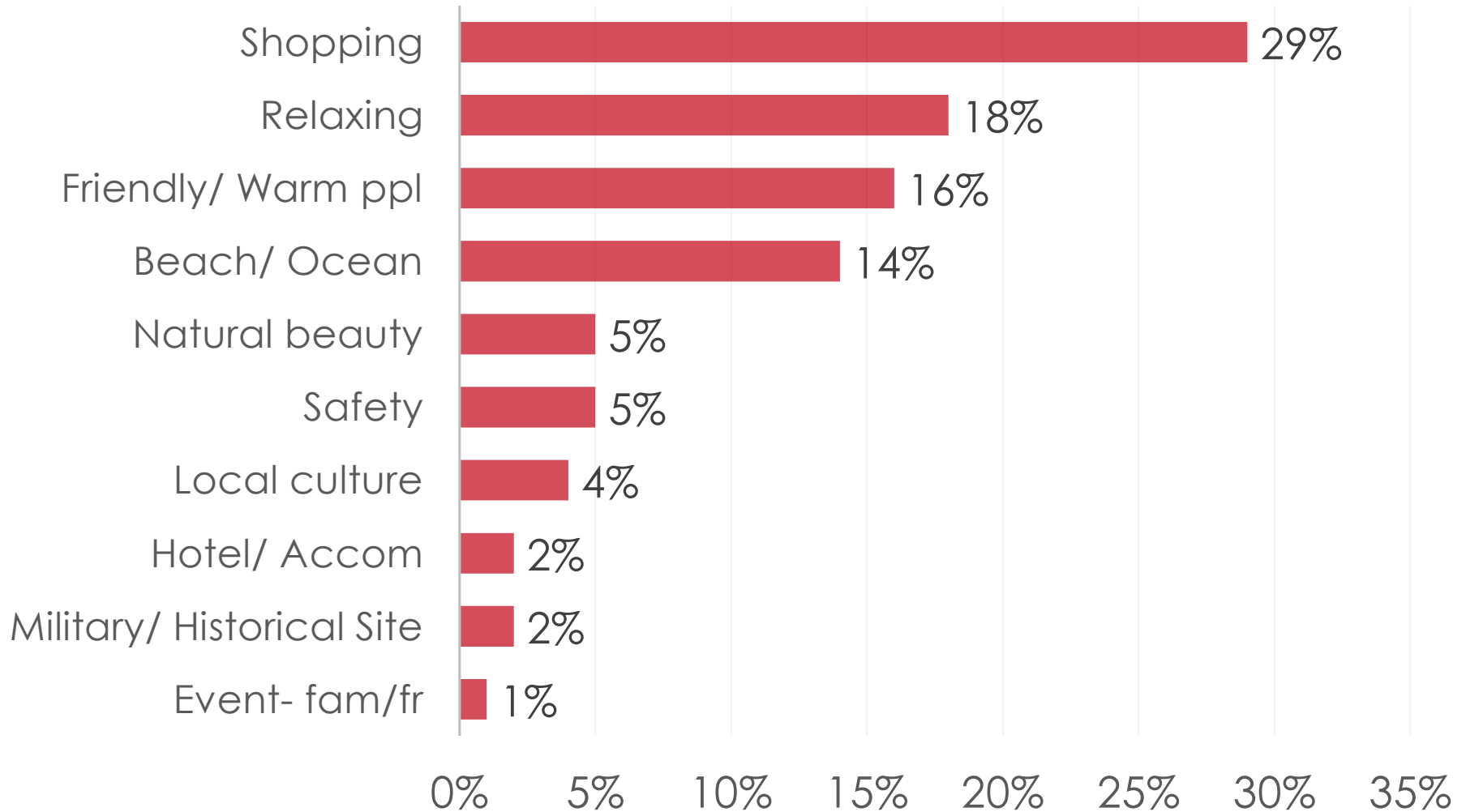
## VISITOR SATISFACTION

### BEHAVIOR

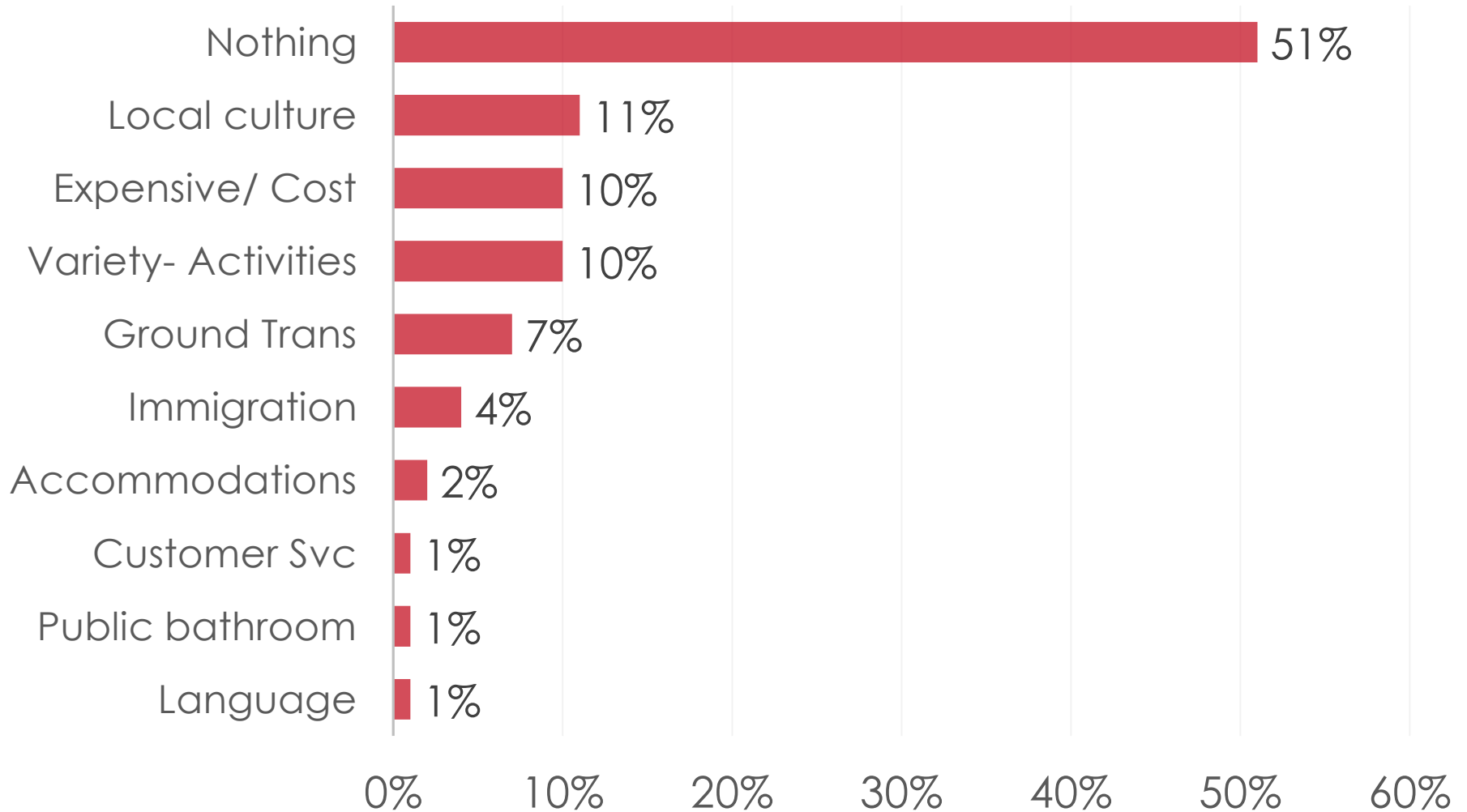
# OVERALL SATISFACTION



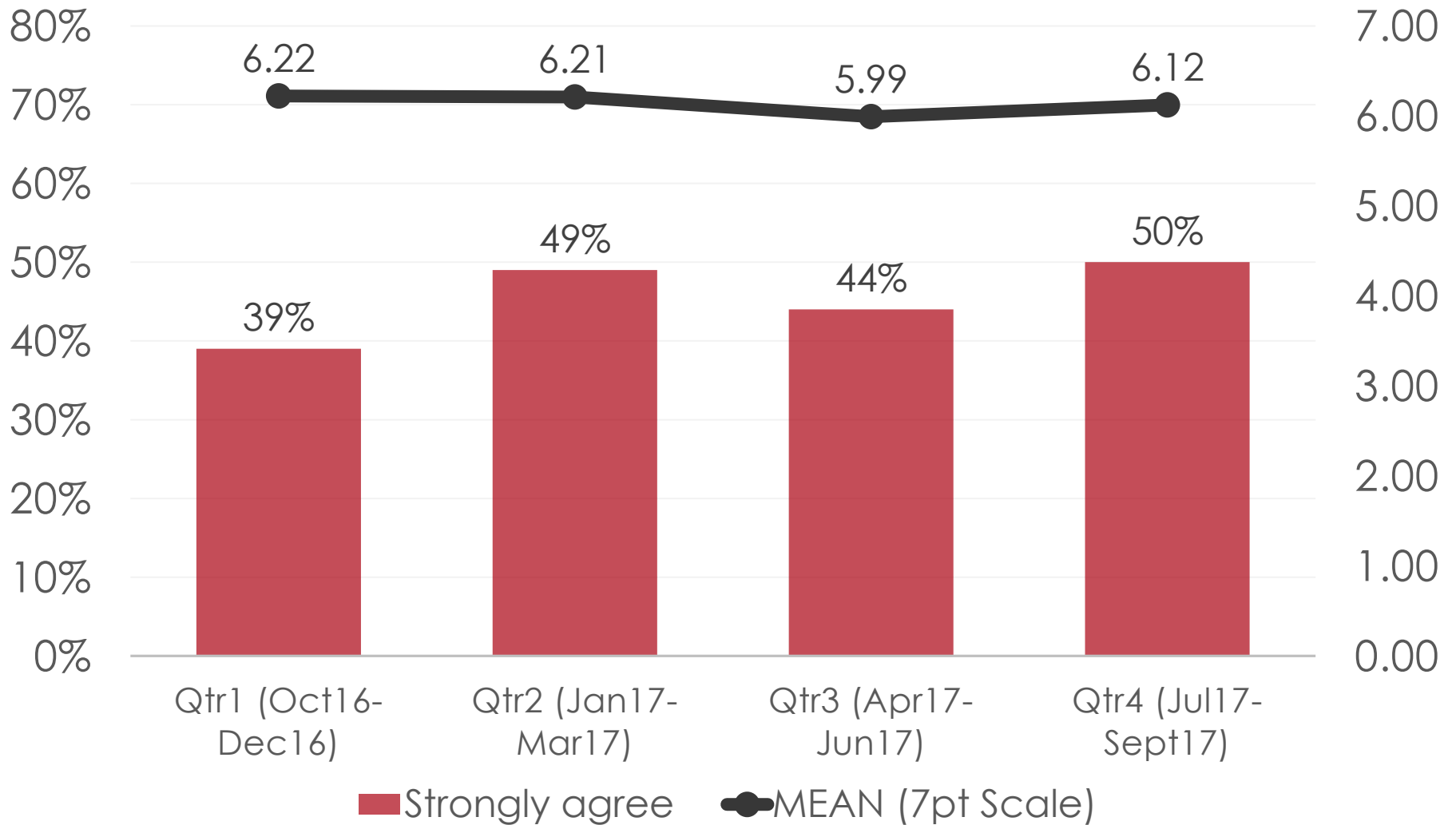
# Positive Aspect of Trip



# Negative Aspect of Trip

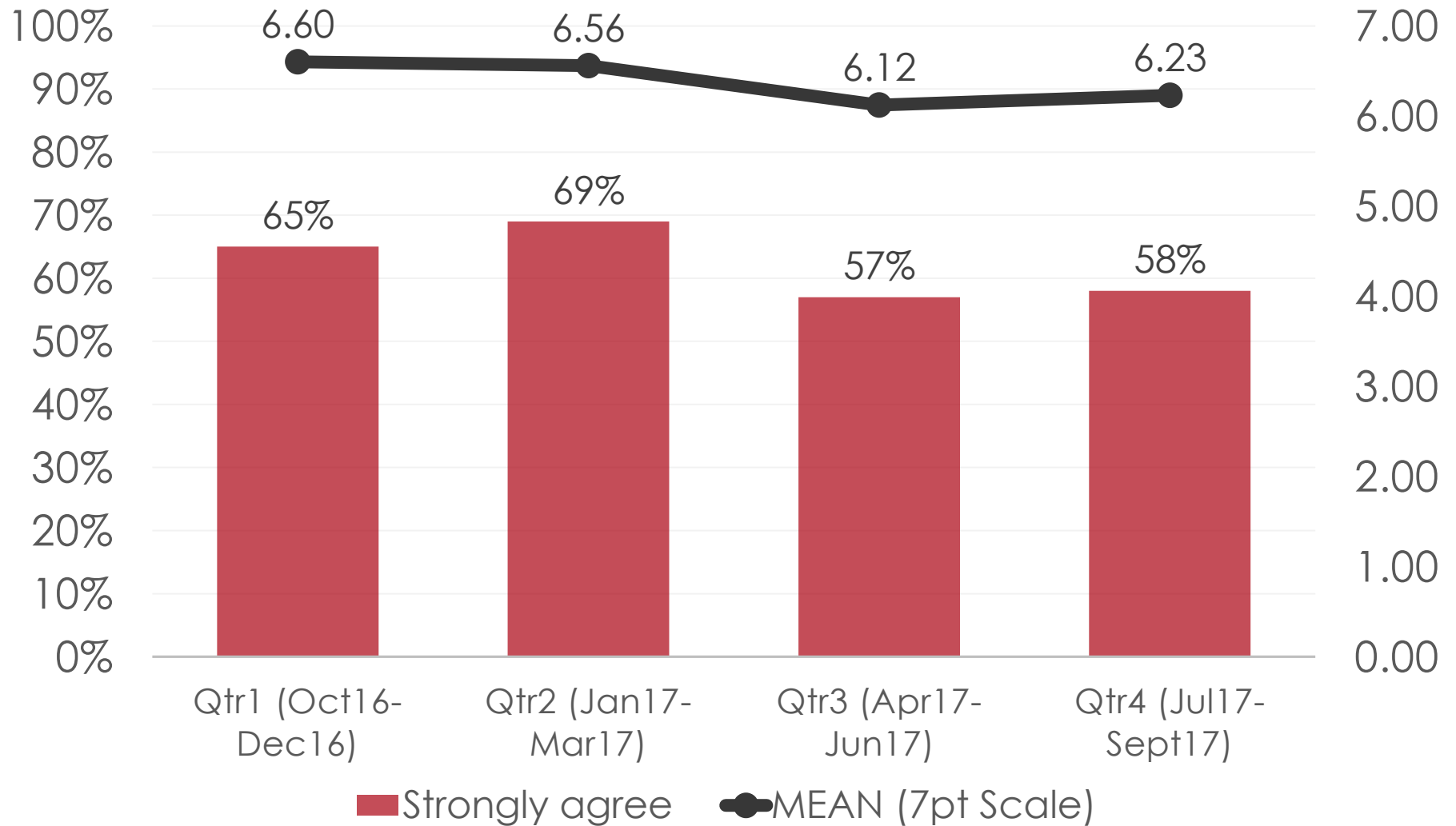


# Guam was better than expected

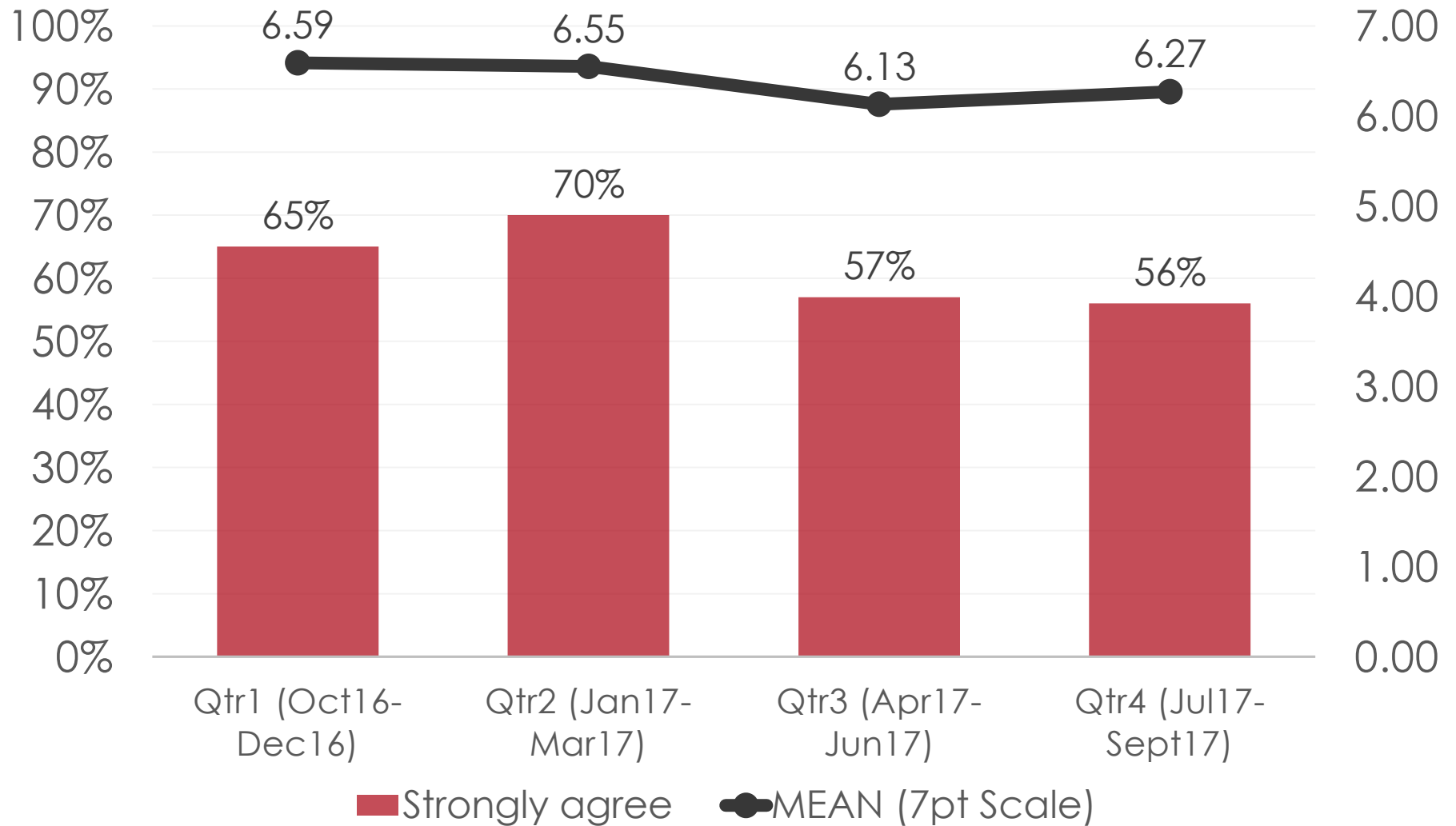




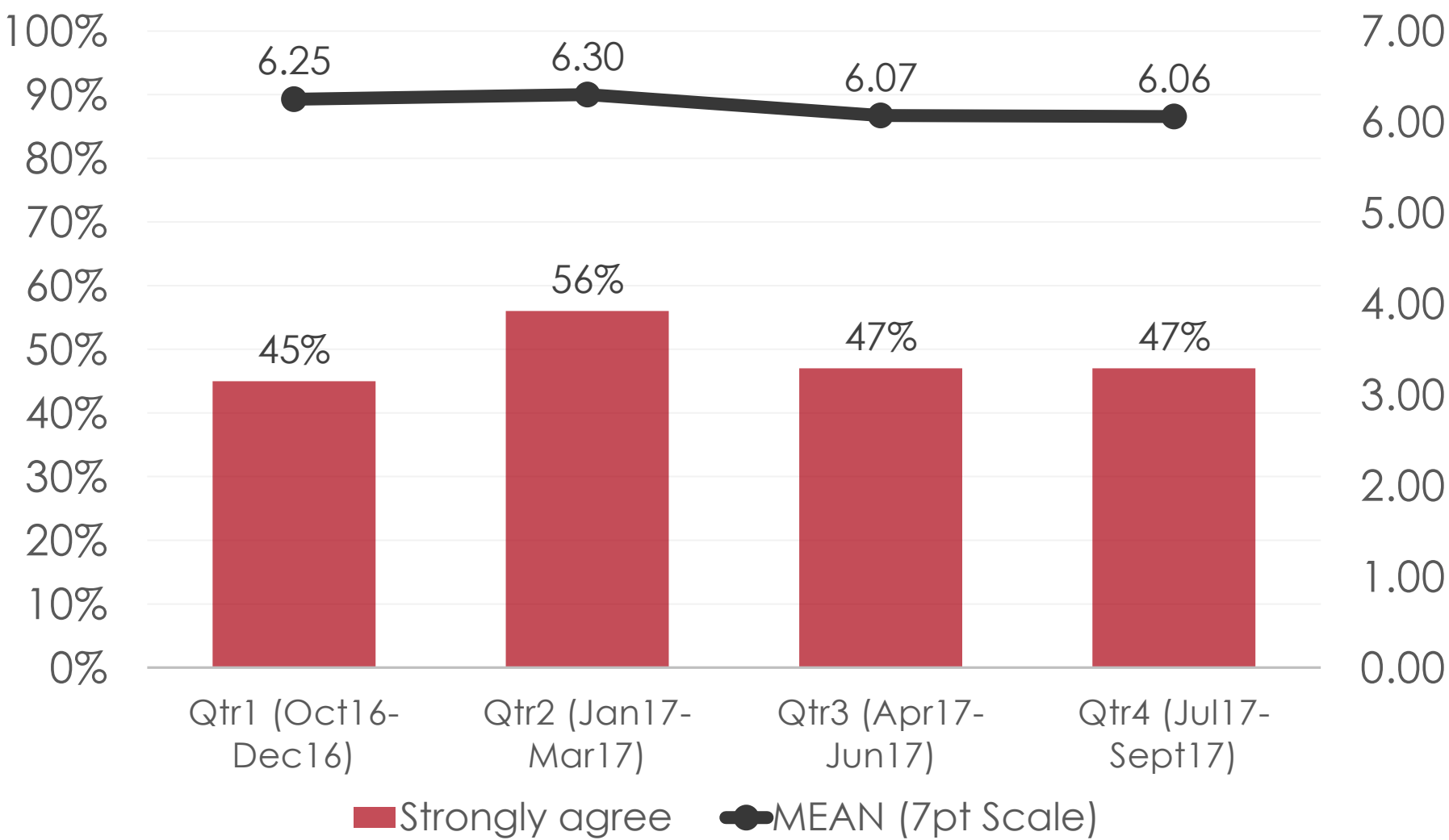
# I had no communication problems



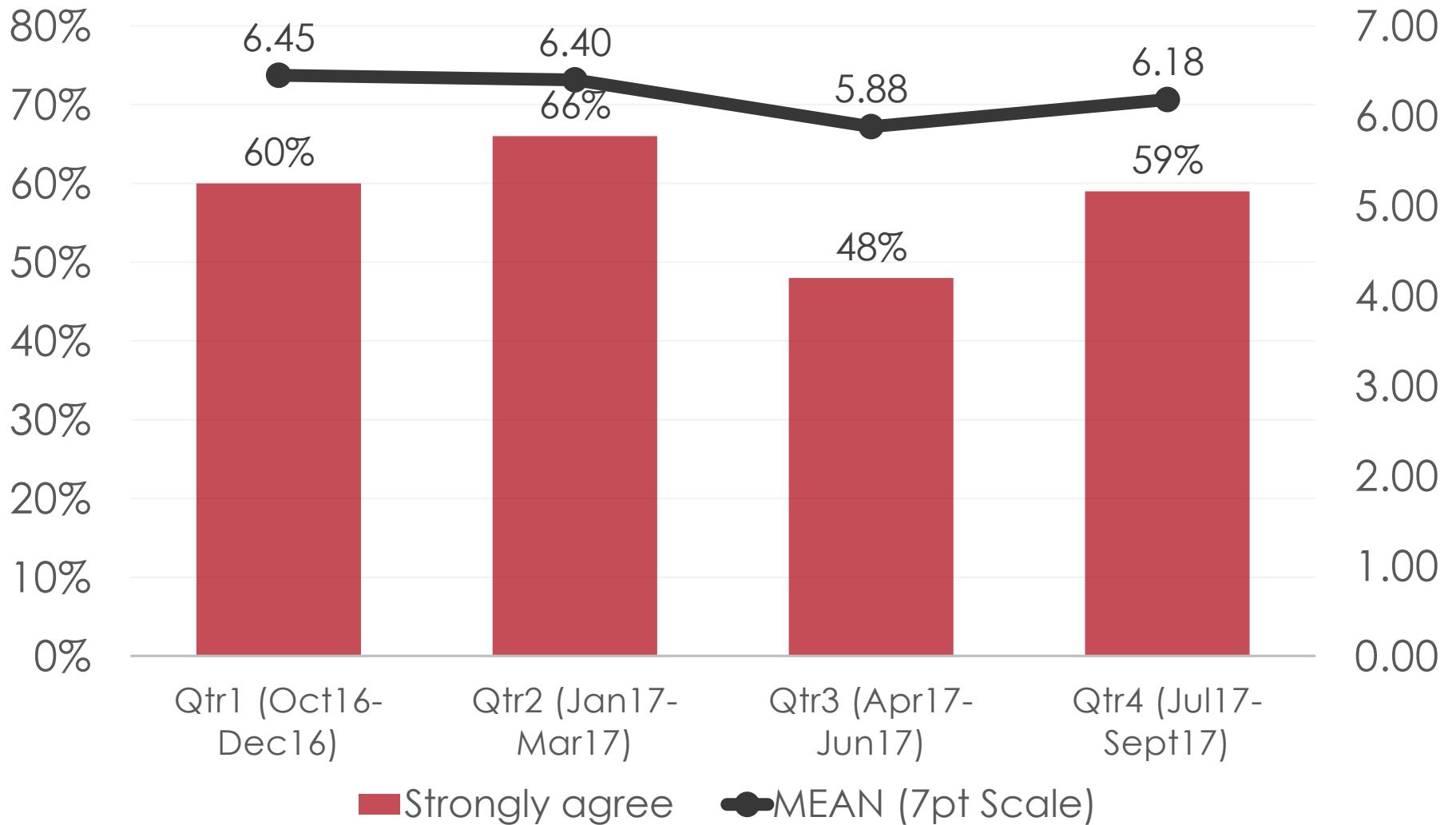
# I will recommend Guam to friends



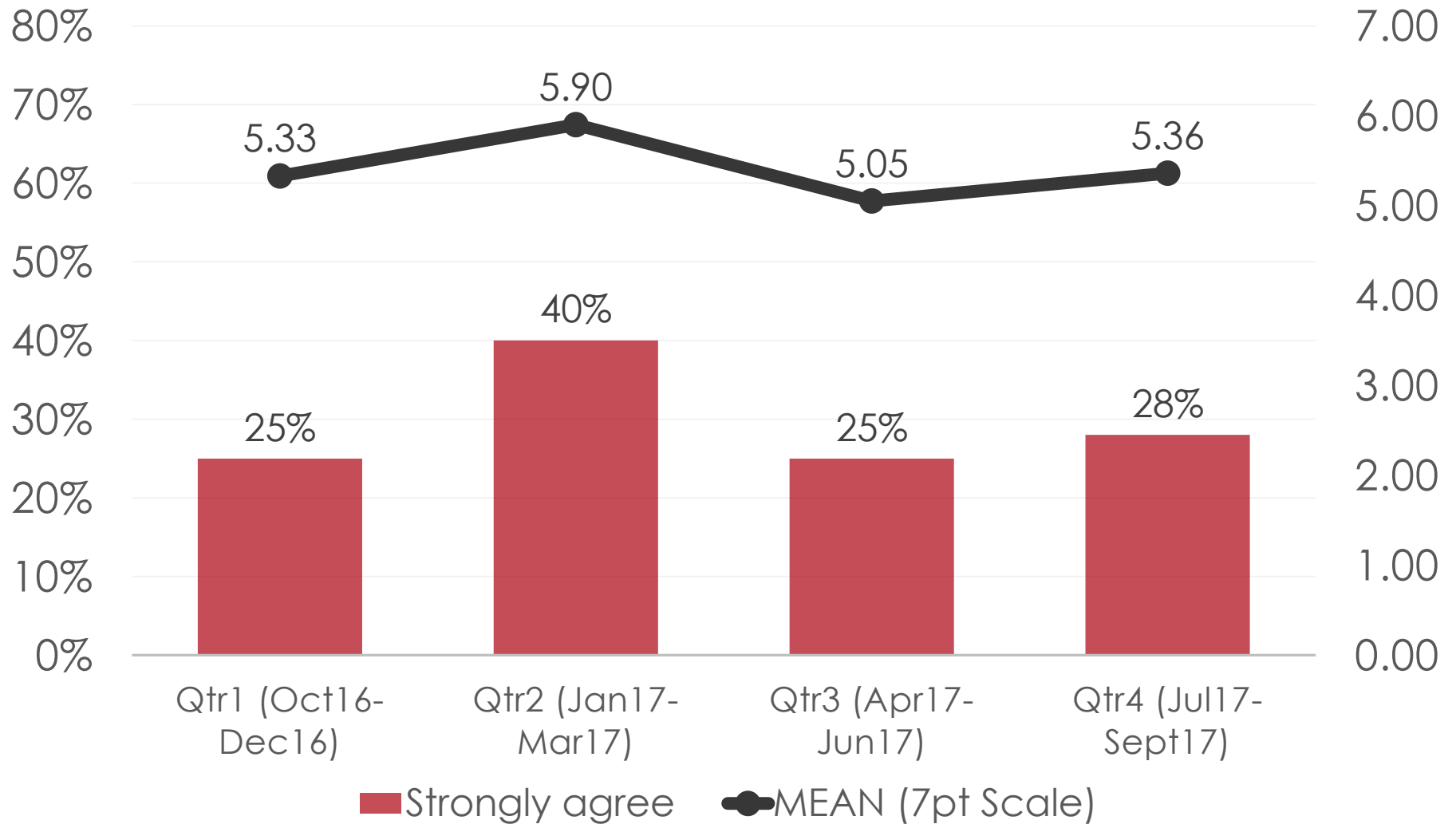
# Sites on Guam were attractive



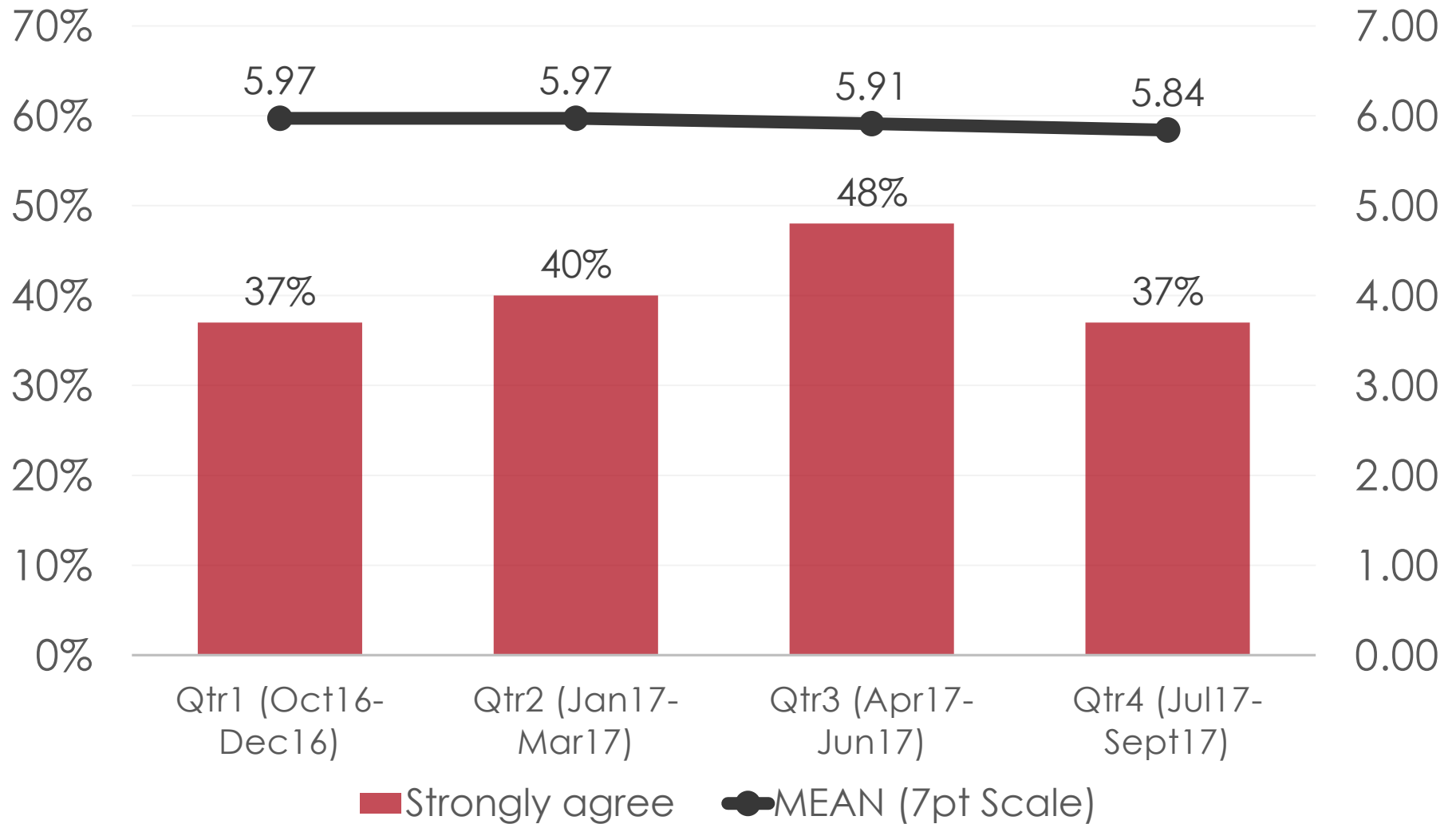
# I plan to visit Guam again



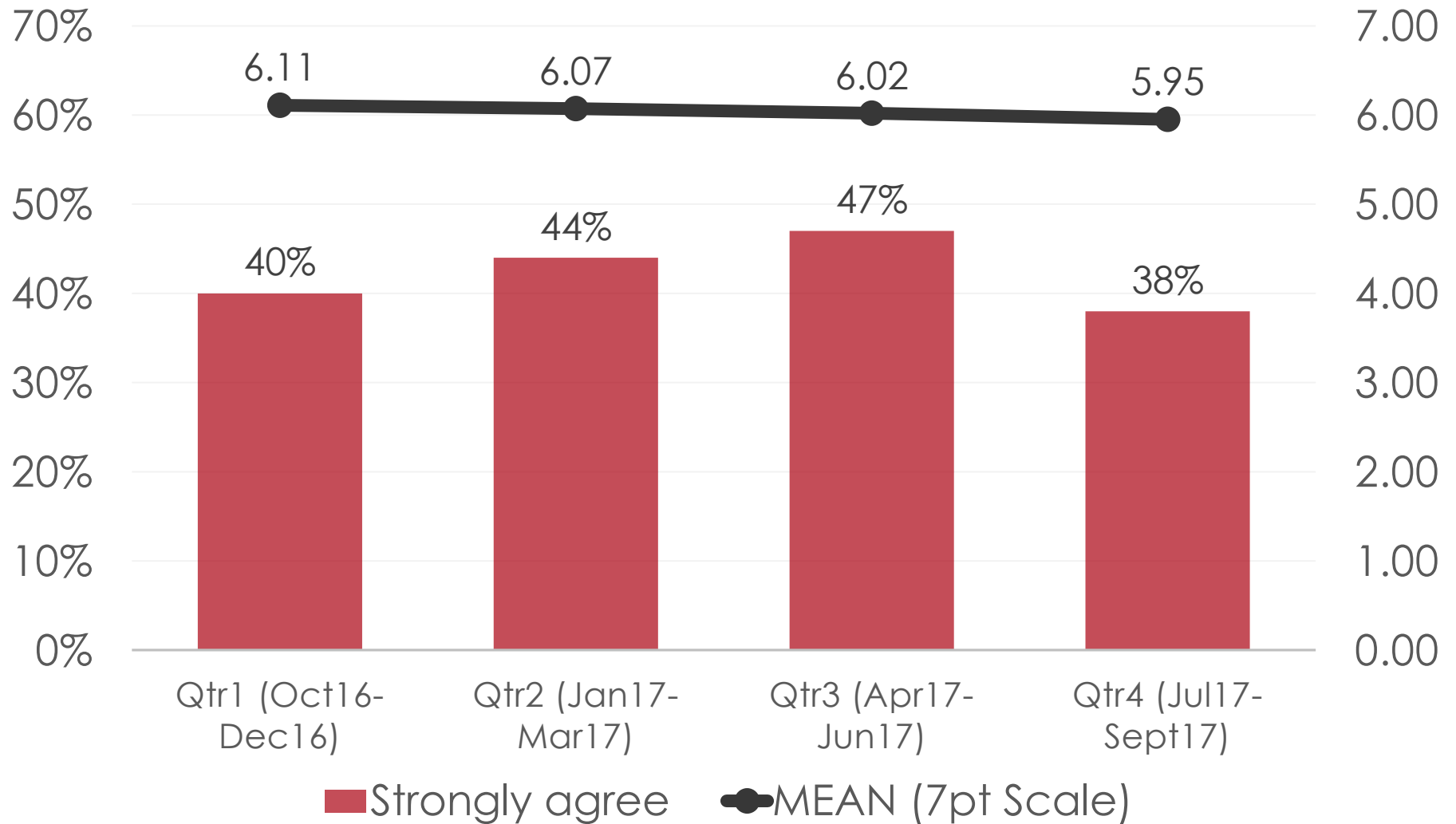
# Not enough night time activities



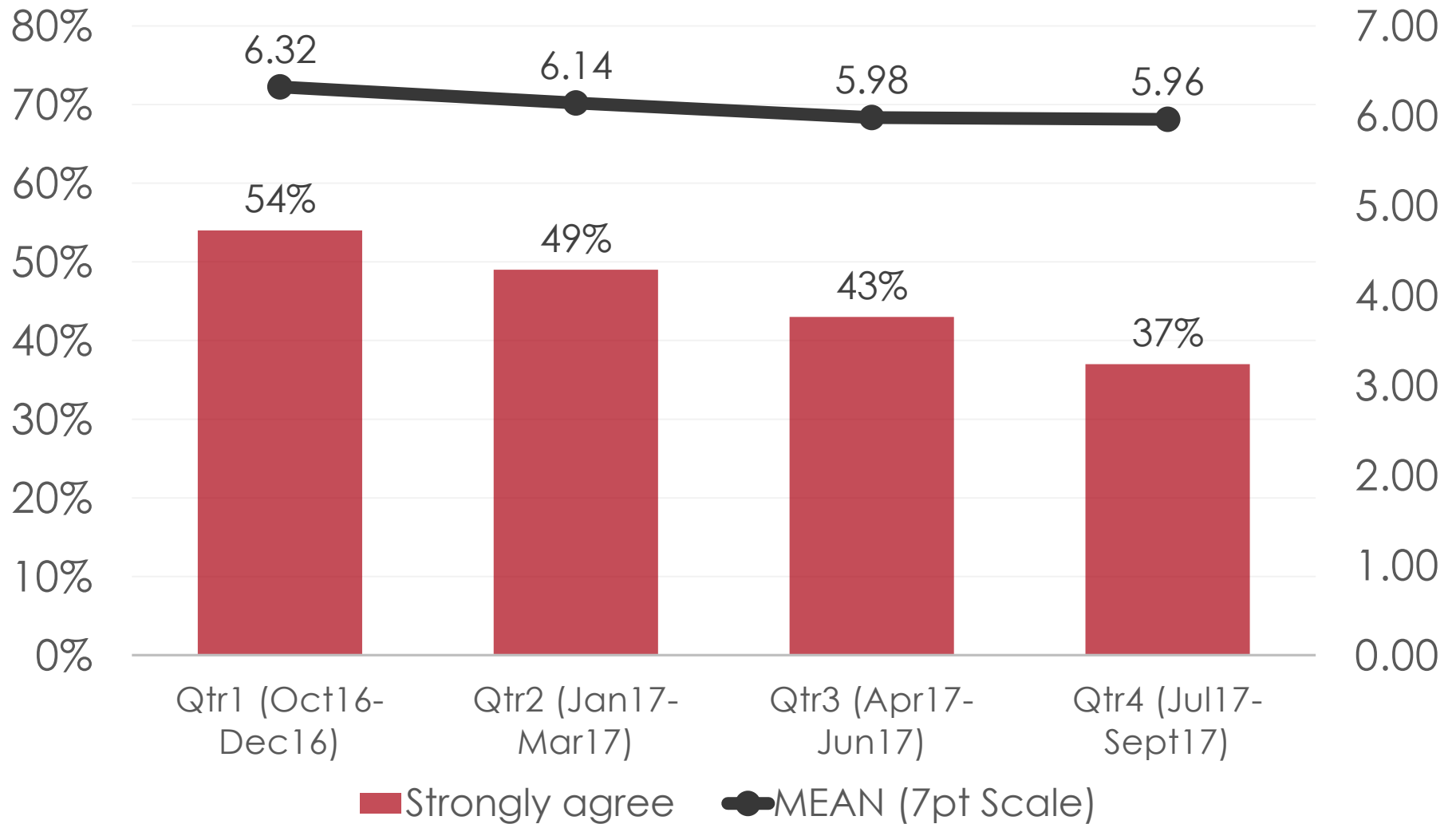
# Tour guides were professional



# Tour drivers were professional

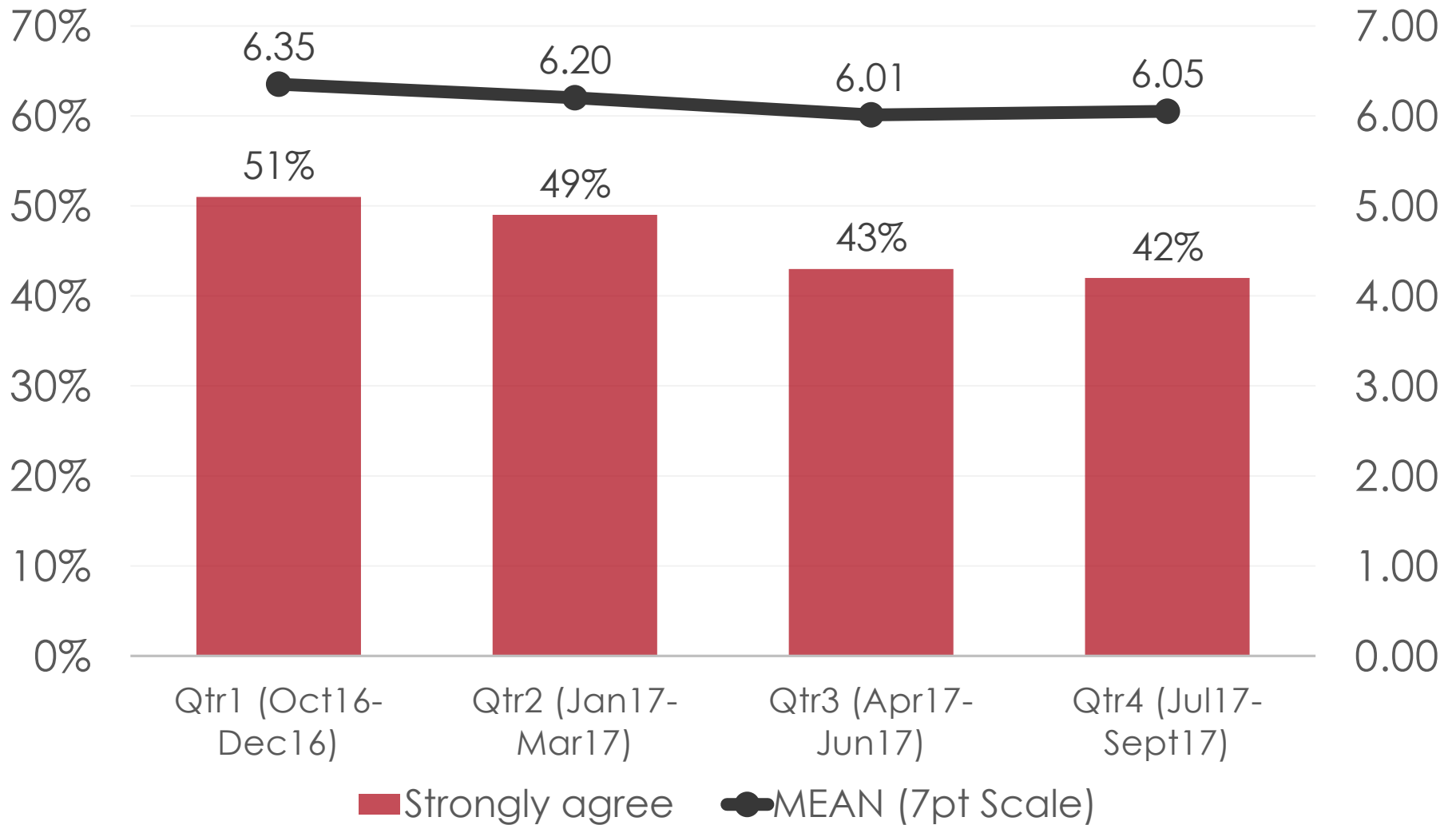


# Taxi drivers were professional

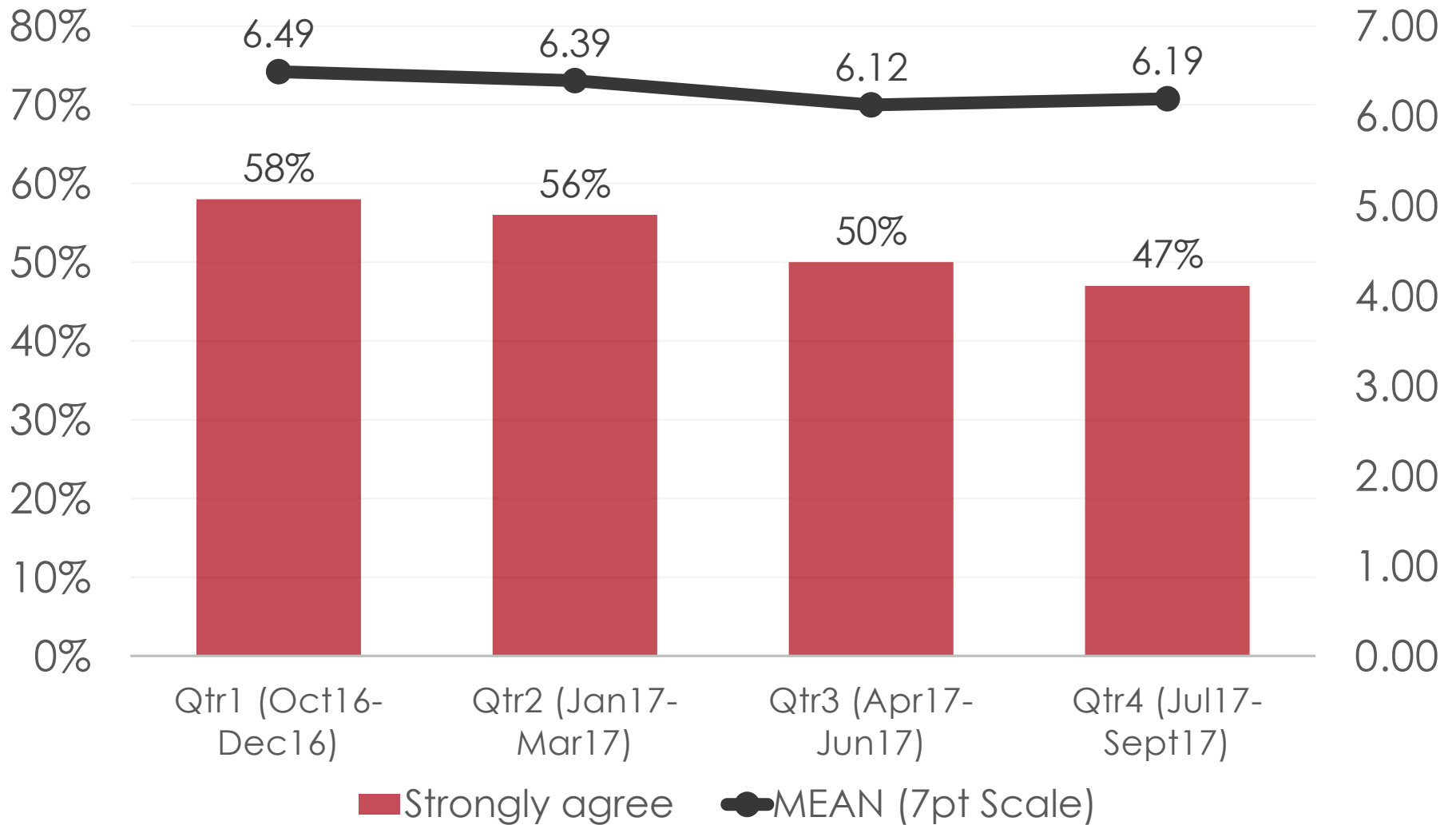




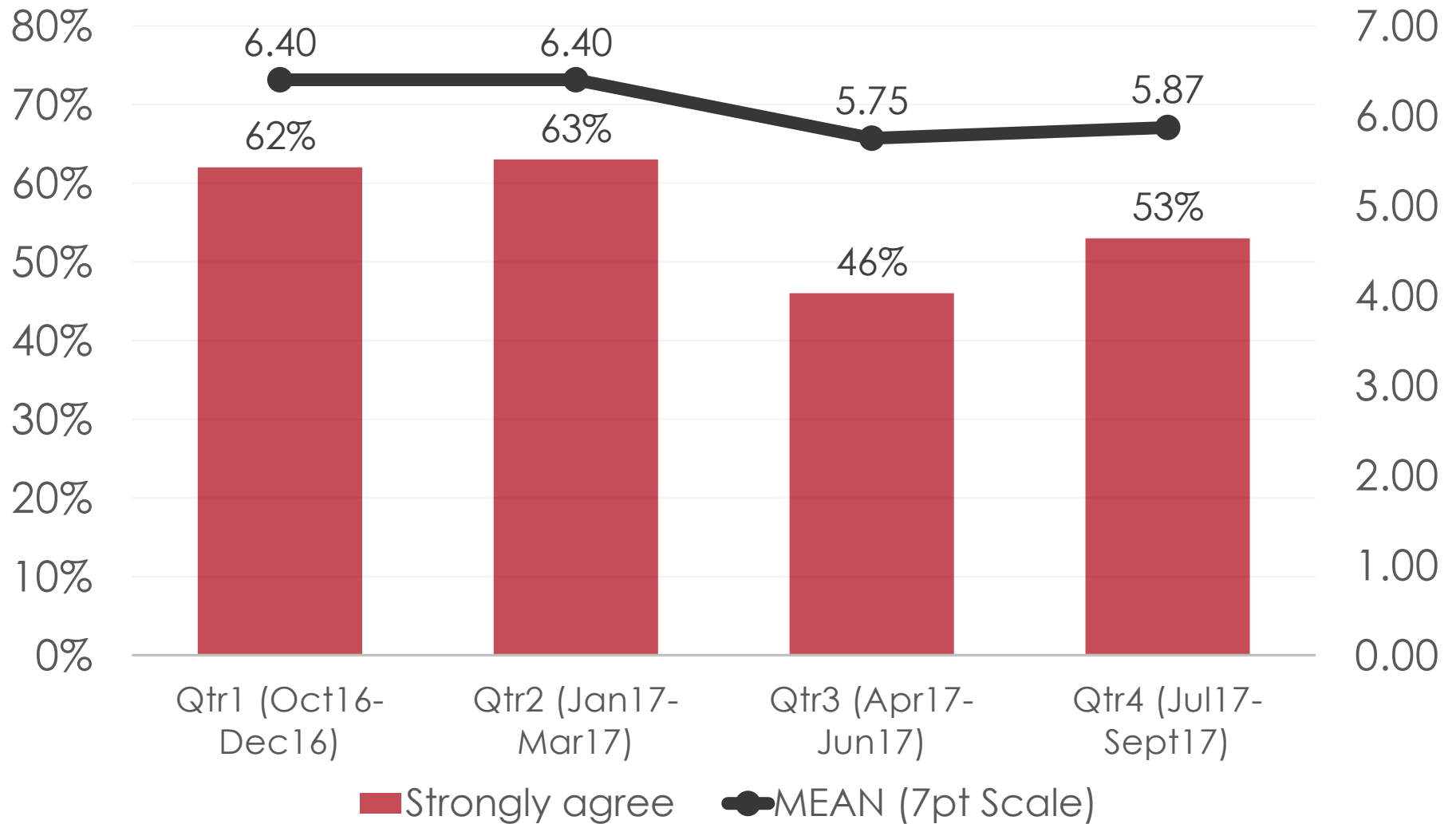
# Taxis were clean



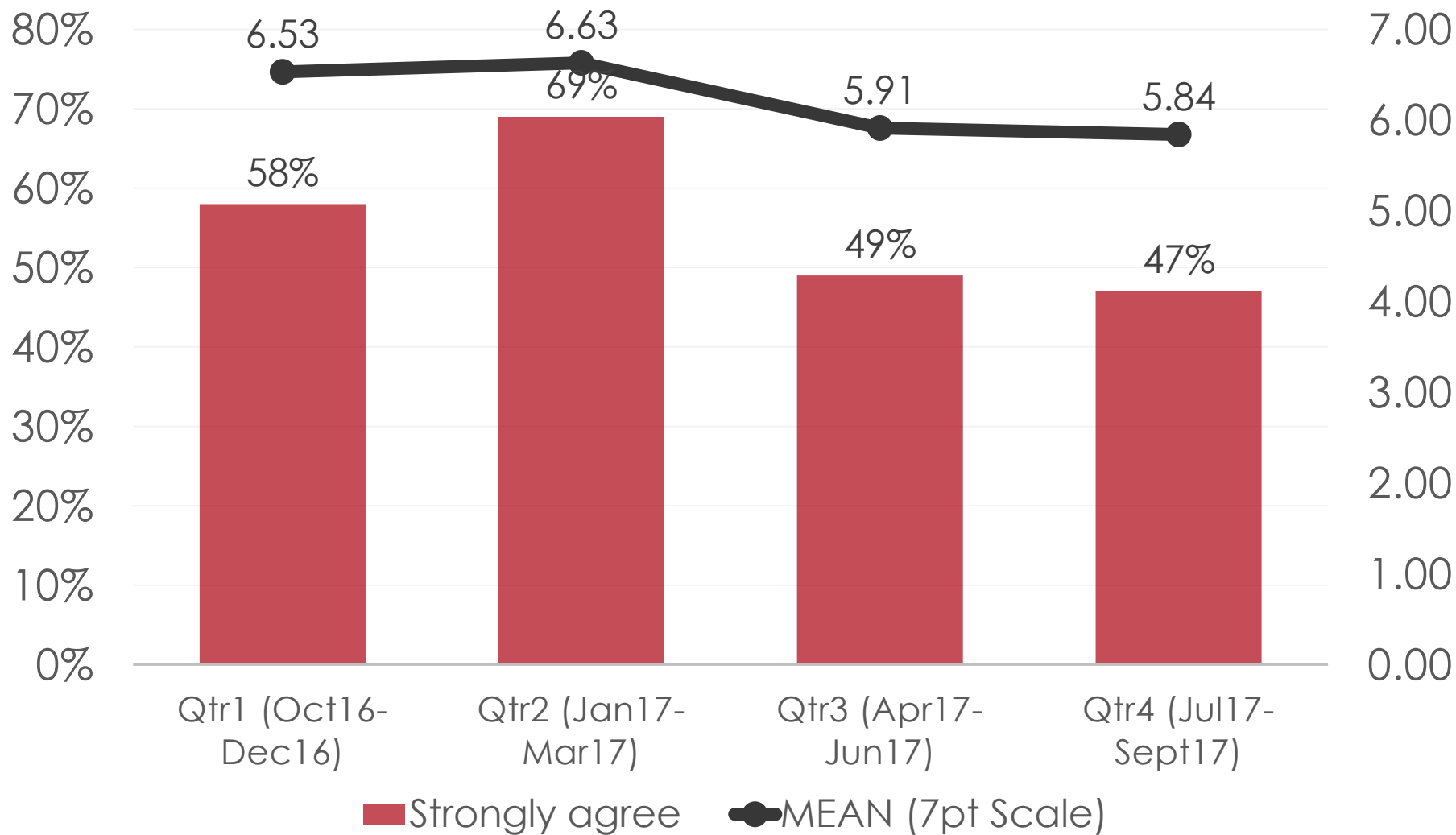
# Guam airport was clean



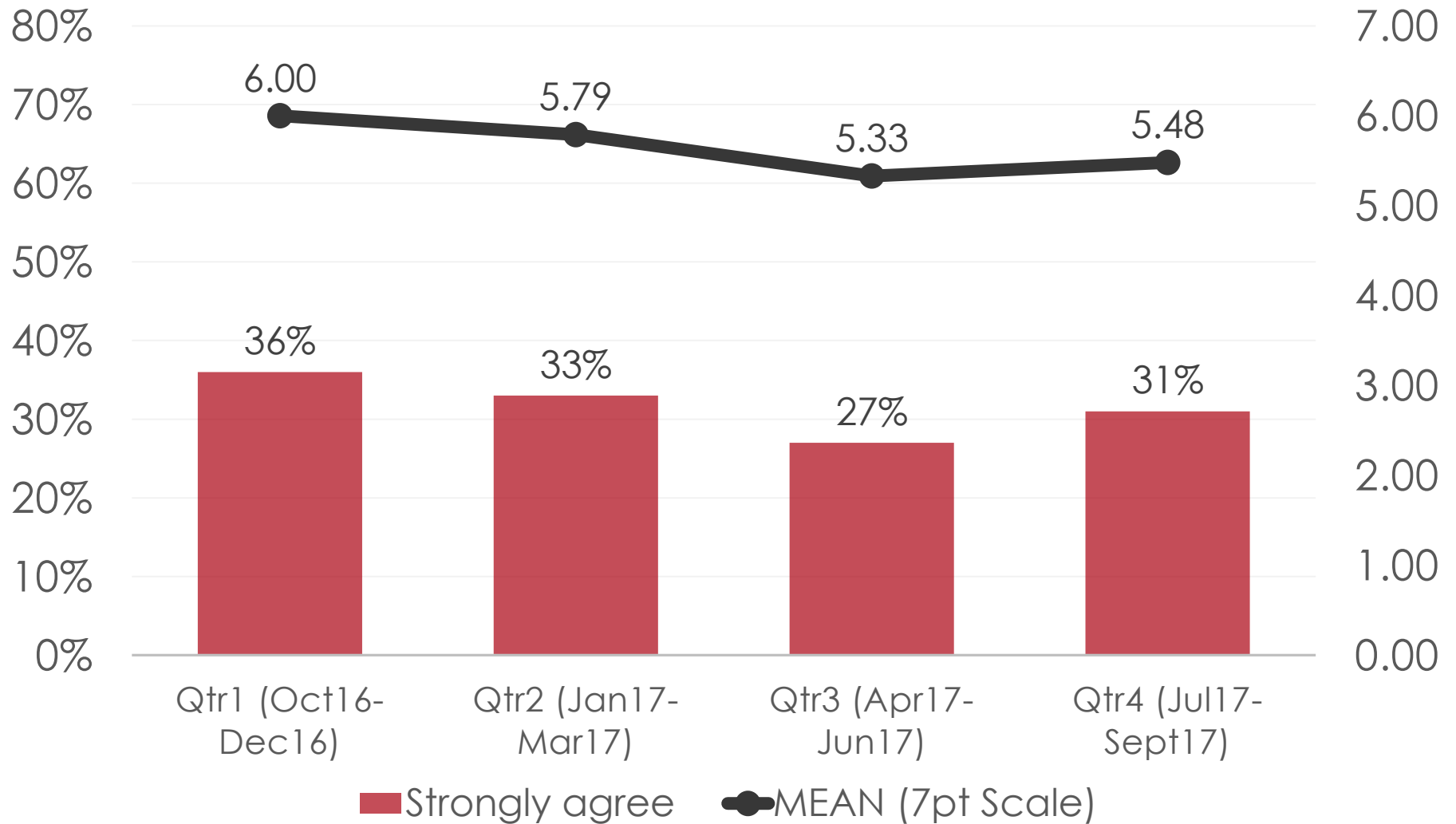
# Ease of getting around



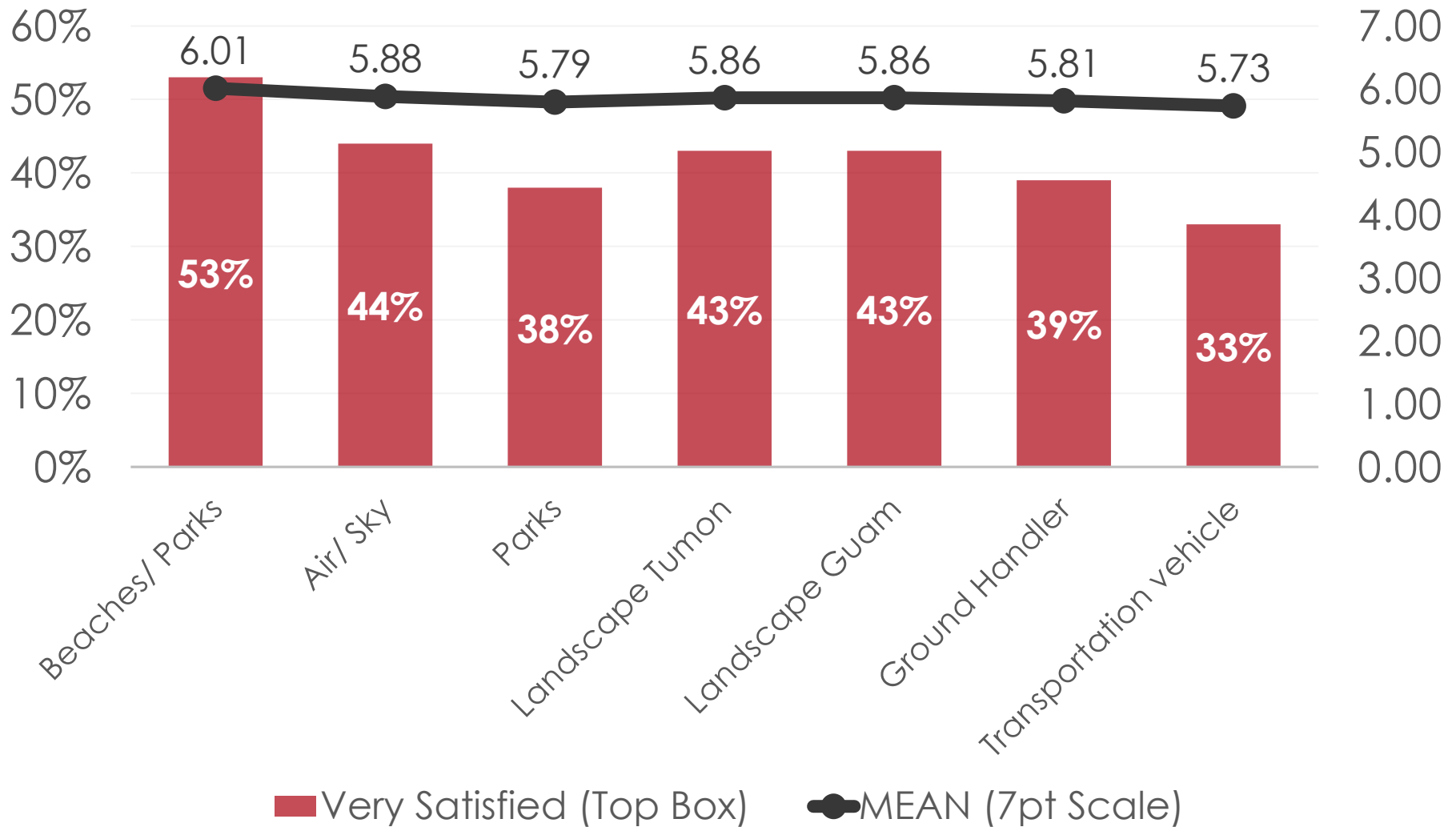
# Safety walking around at night



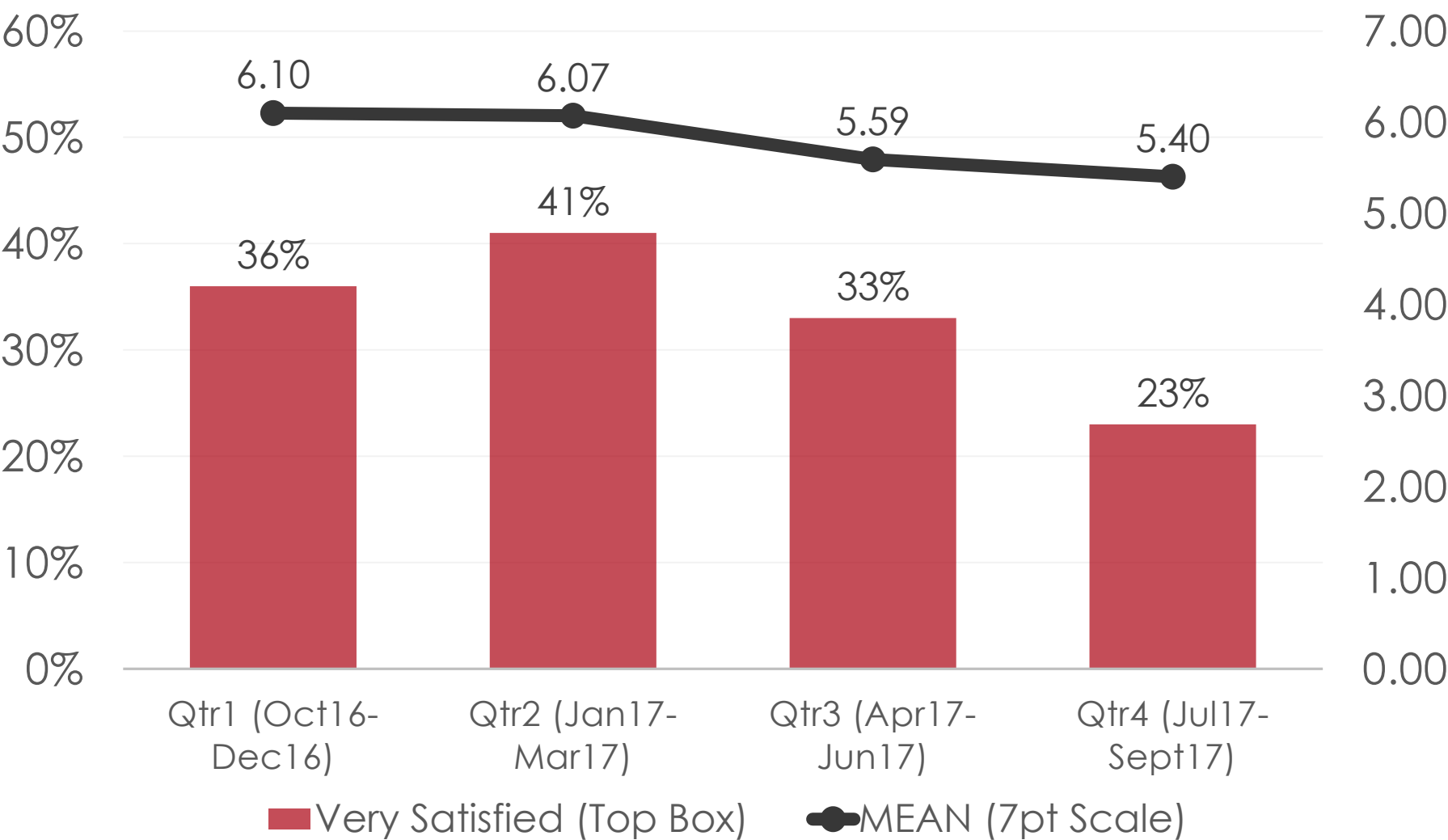
# Price of things on Guam



# GENERAL SATISFACTION – Quality/ Cleanliness

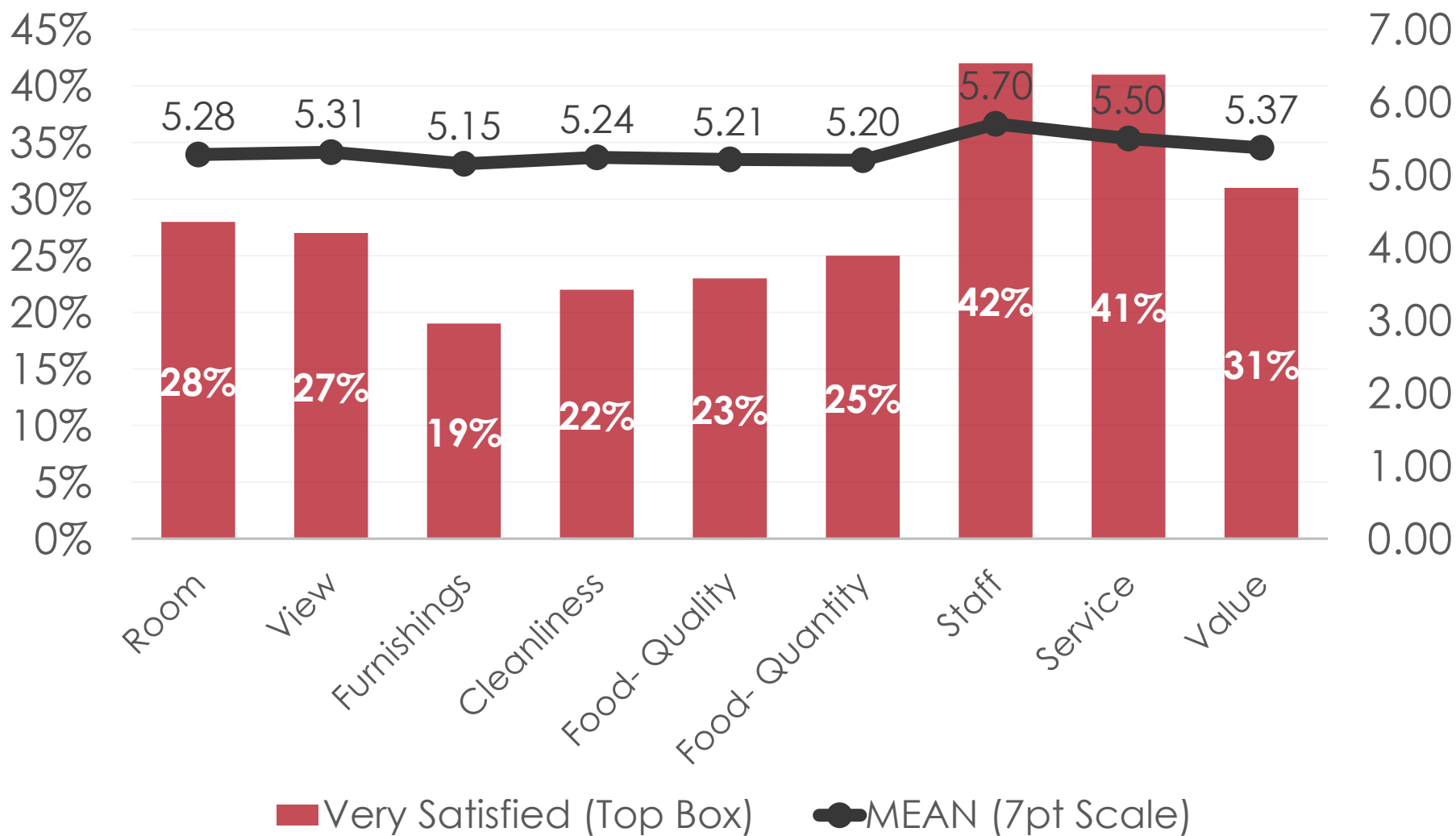


# ACCOMMODATIONS – OVERALL SATISFACTION



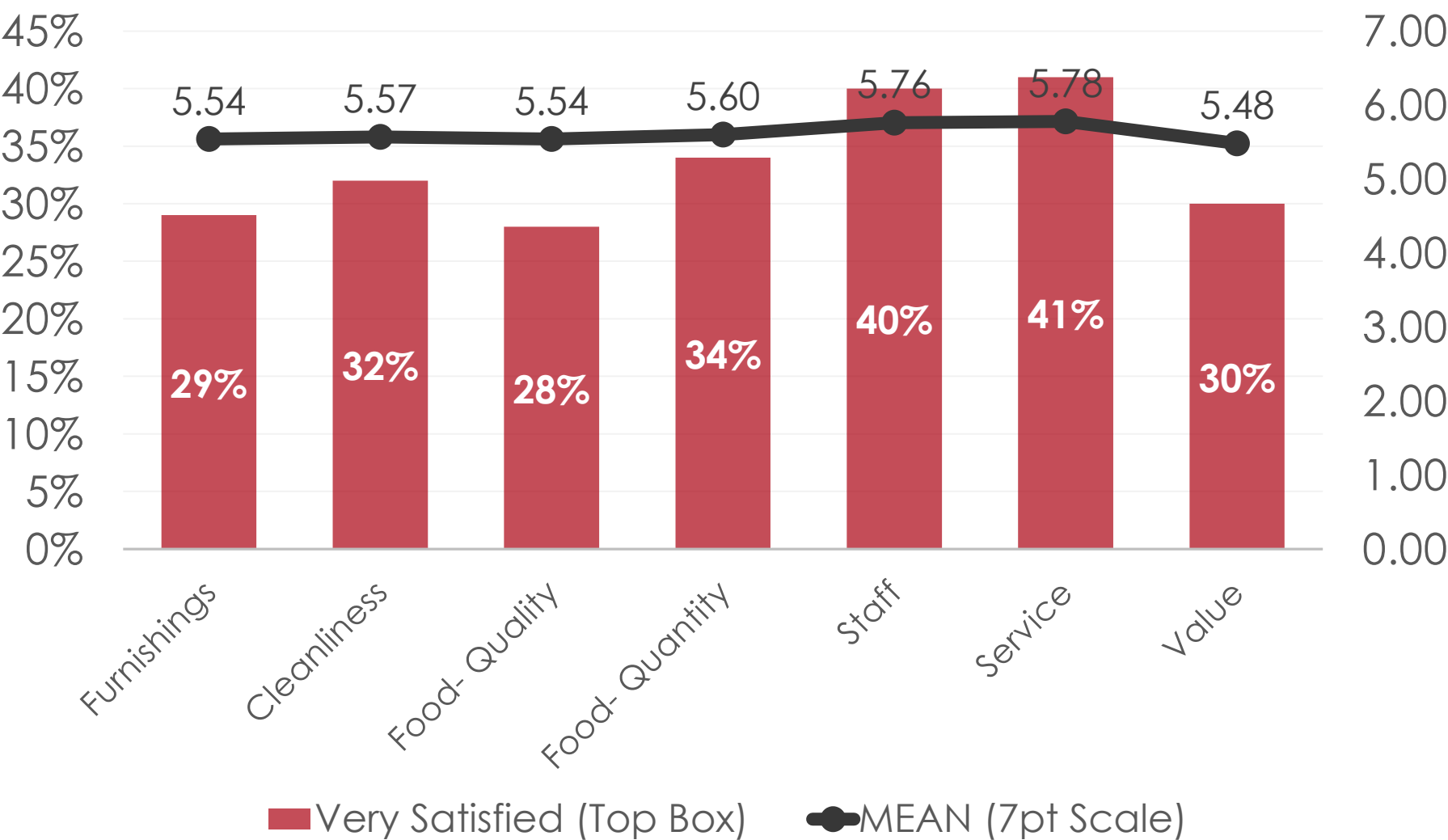
# ACCOMMODATIONS –

## Satisfaction by Category

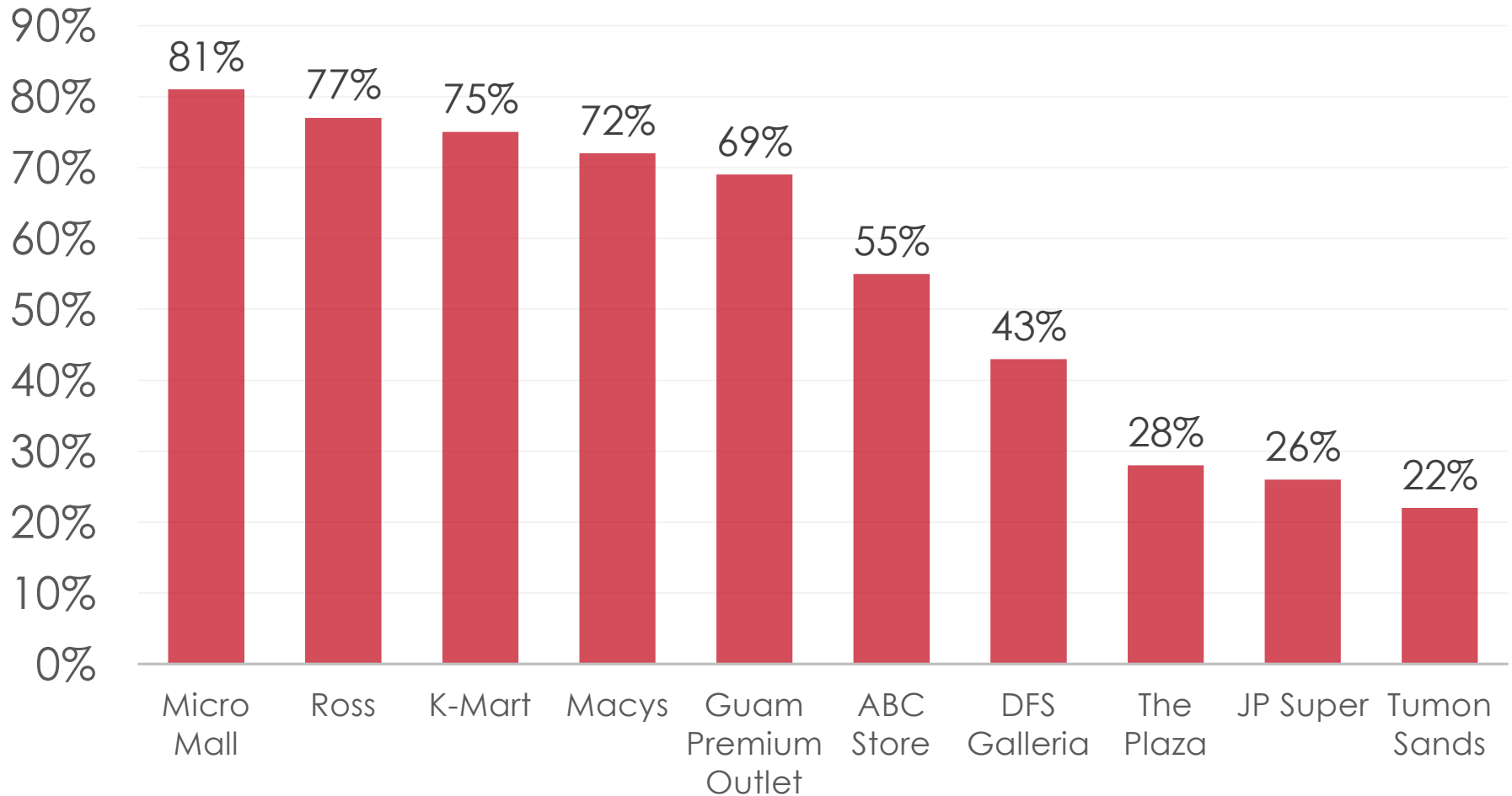




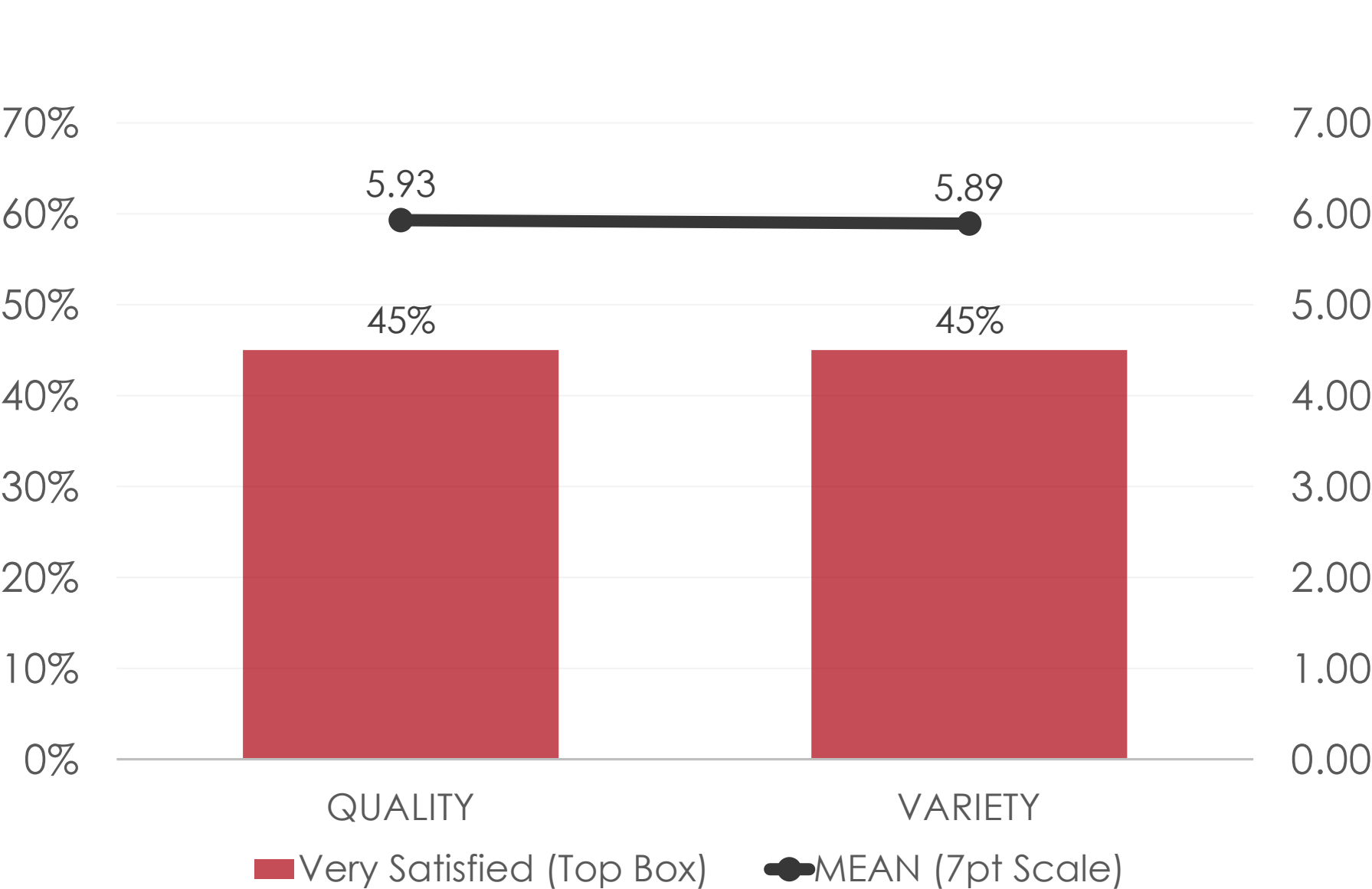
# DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



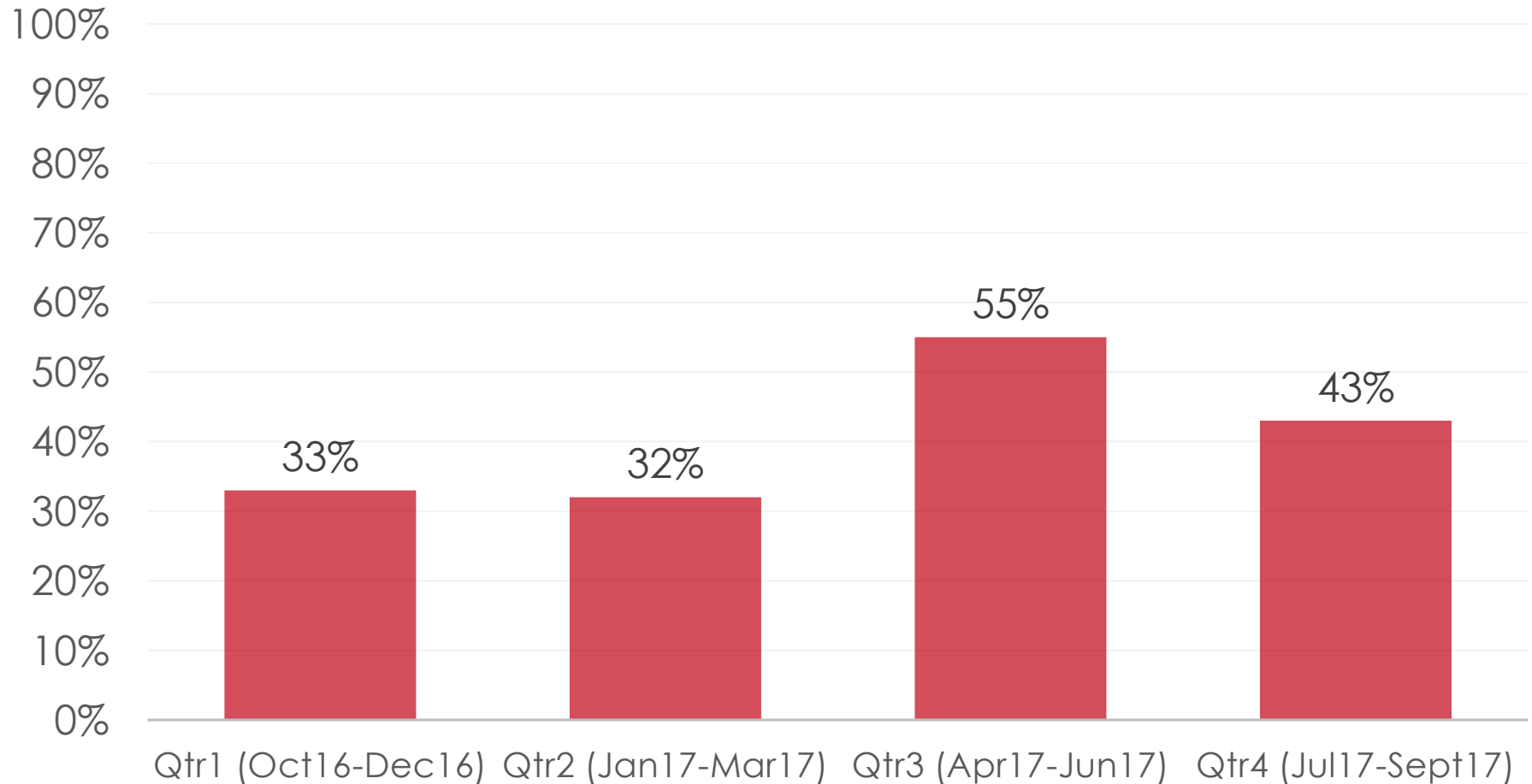
# Shopping Malls/ Stores (Top Responses)



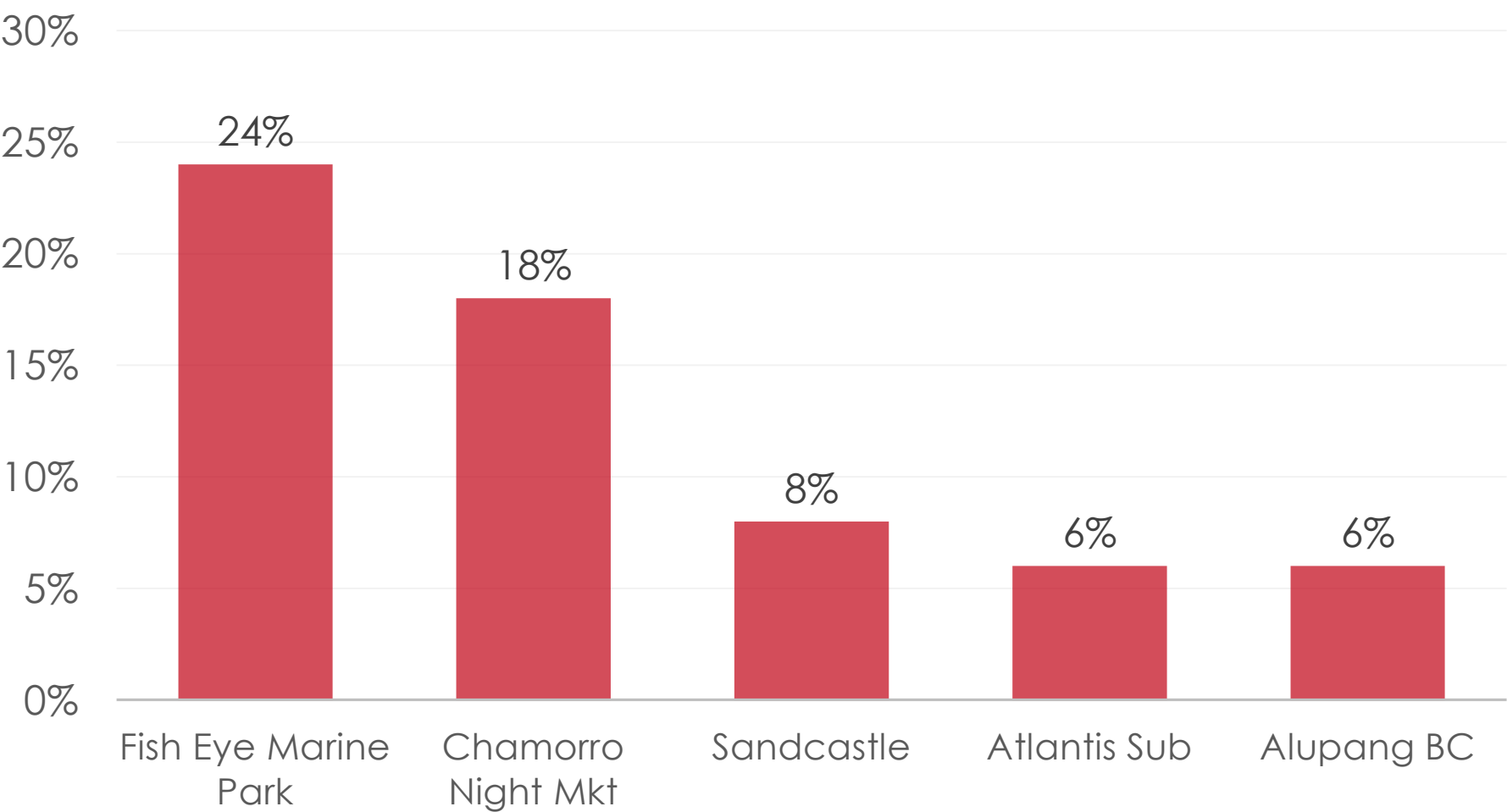
# SHOPPING - SATISFACTION



# OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

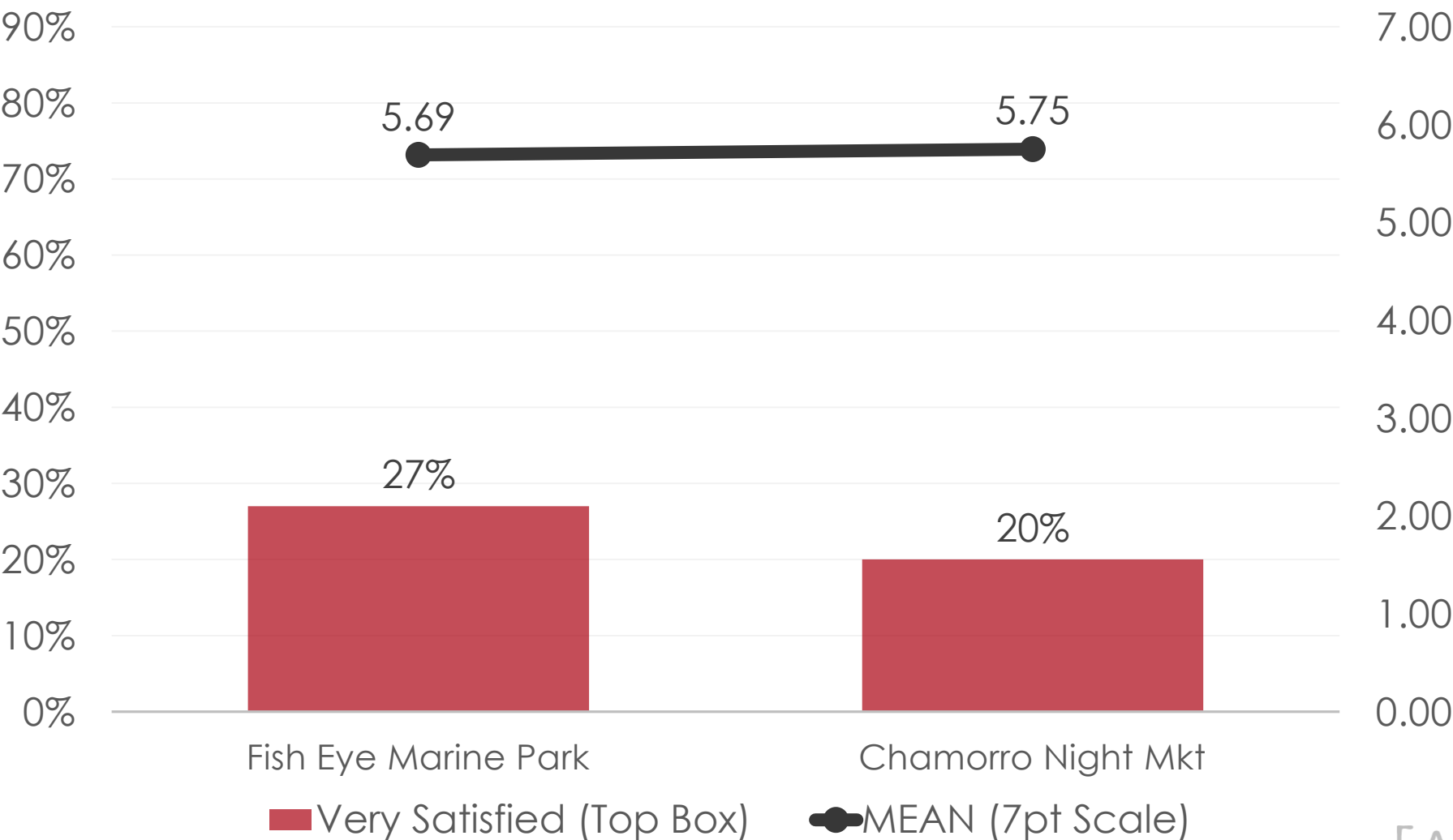


# Optional Tour Participation (Top Responses)

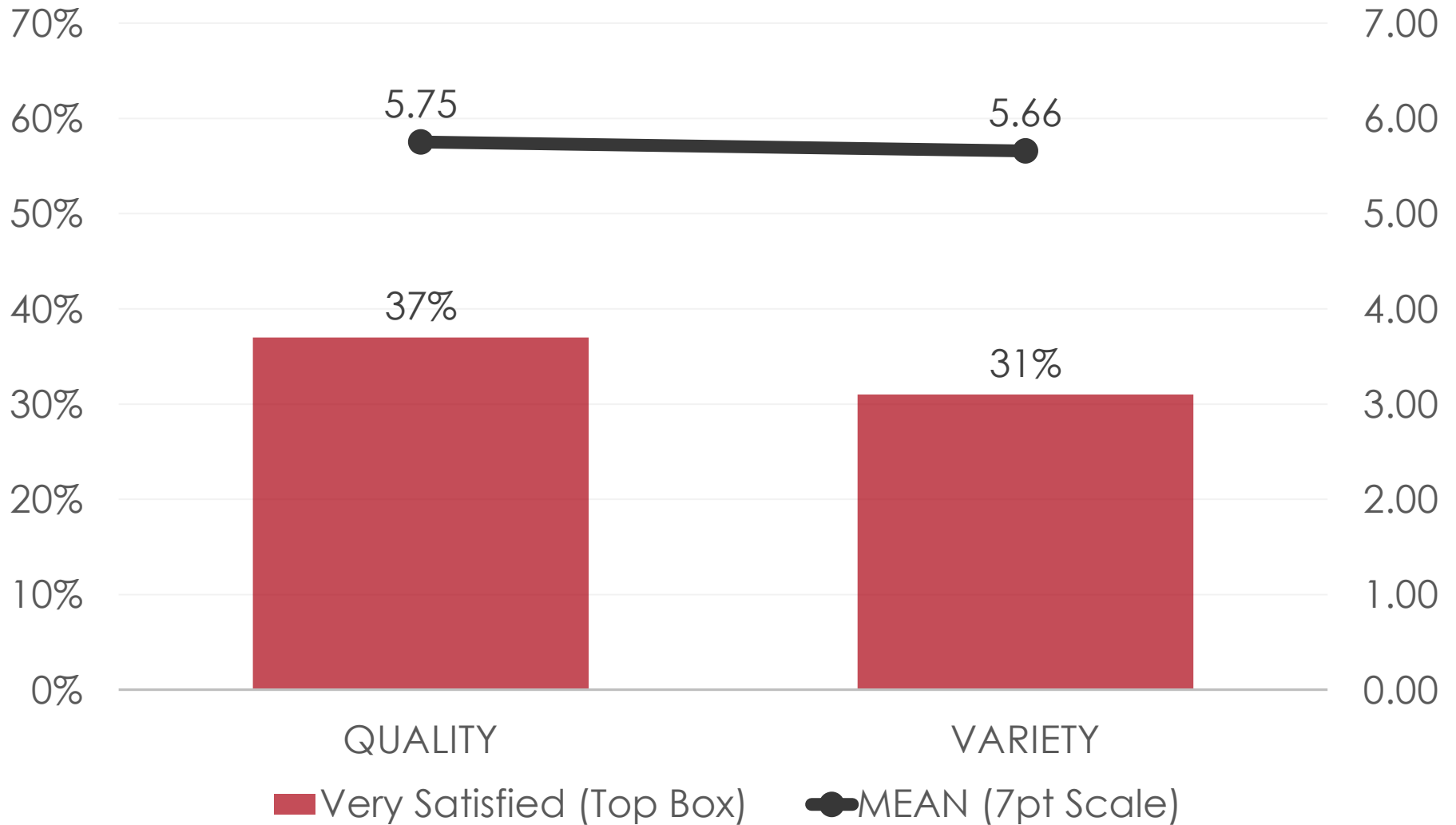


# Optional Tour Satisfaction

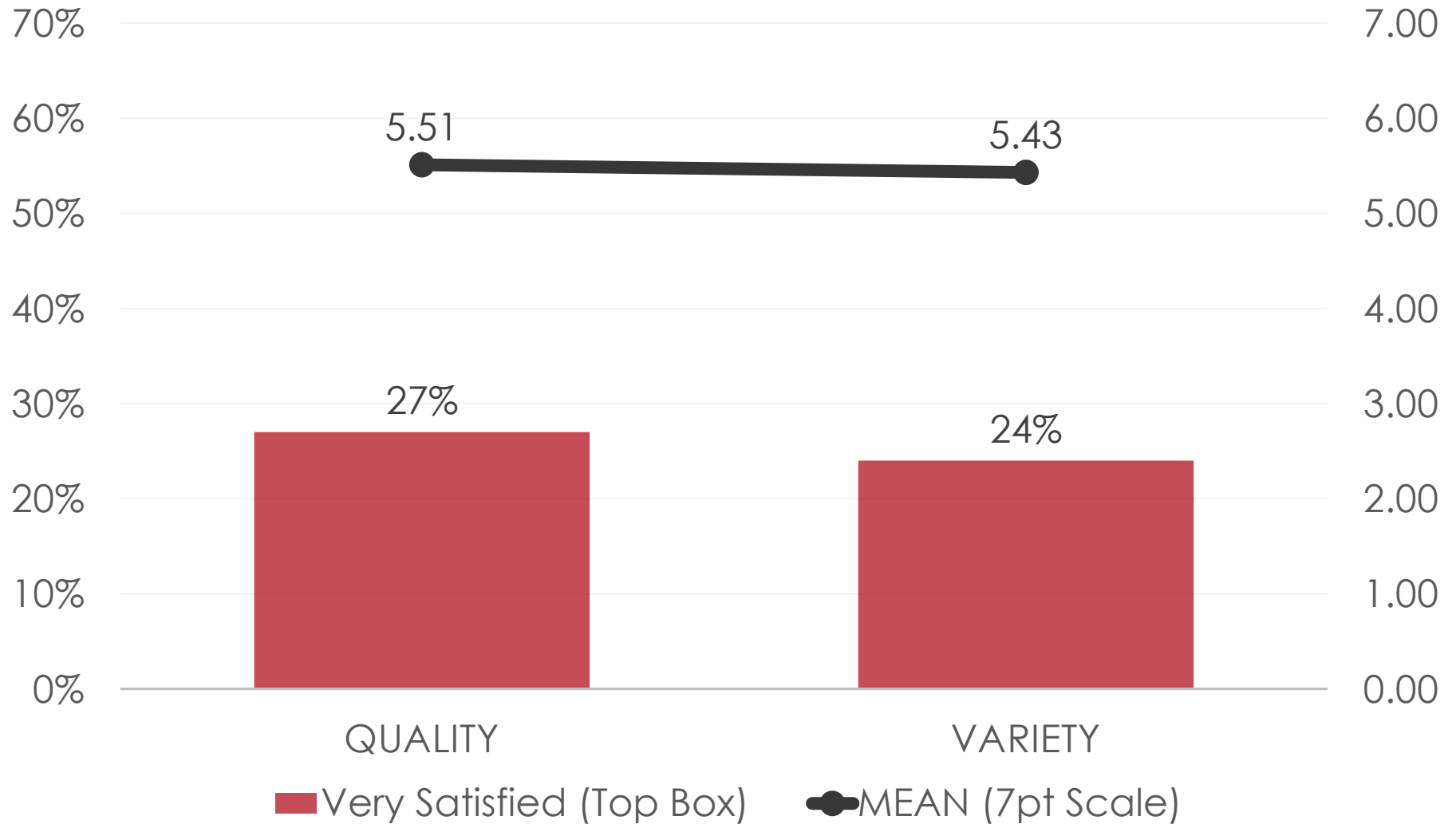
## Top Responses only - Participation (10%+)



# DAY TOUR - SATISFACTION

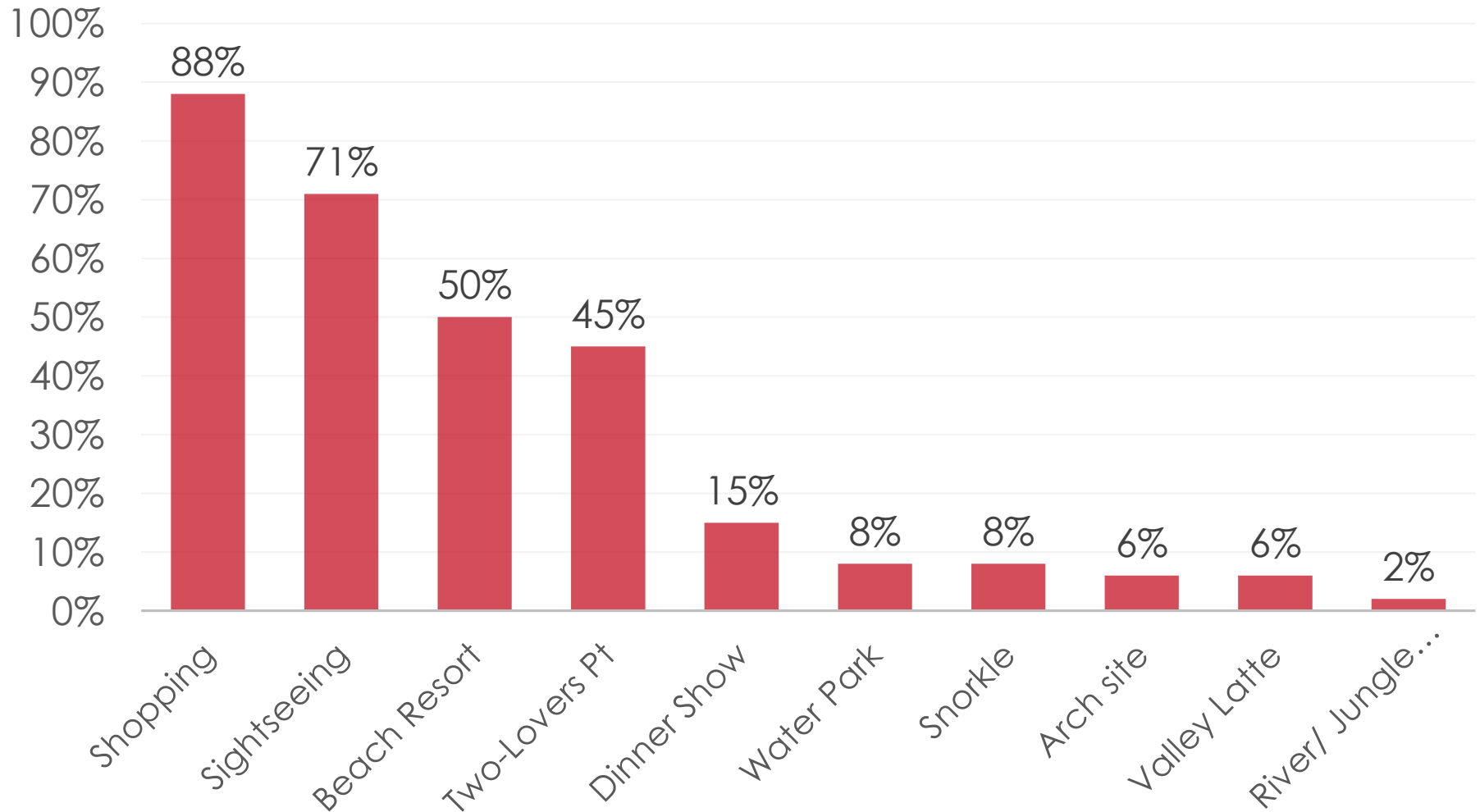


# NIGHT TOUR - SATISFACTION





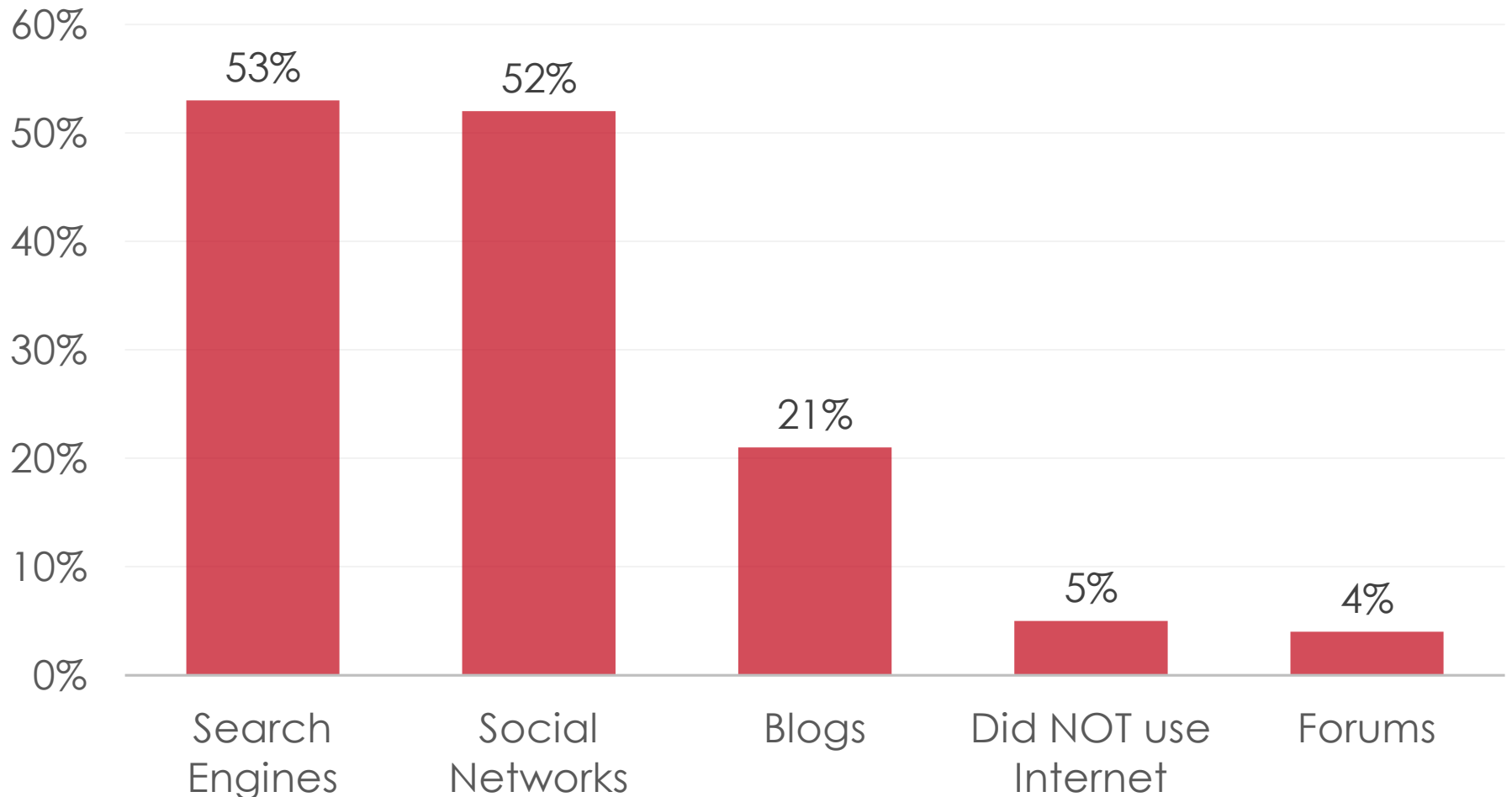
# Activities Participation (Top Responses)



# SECTION 5

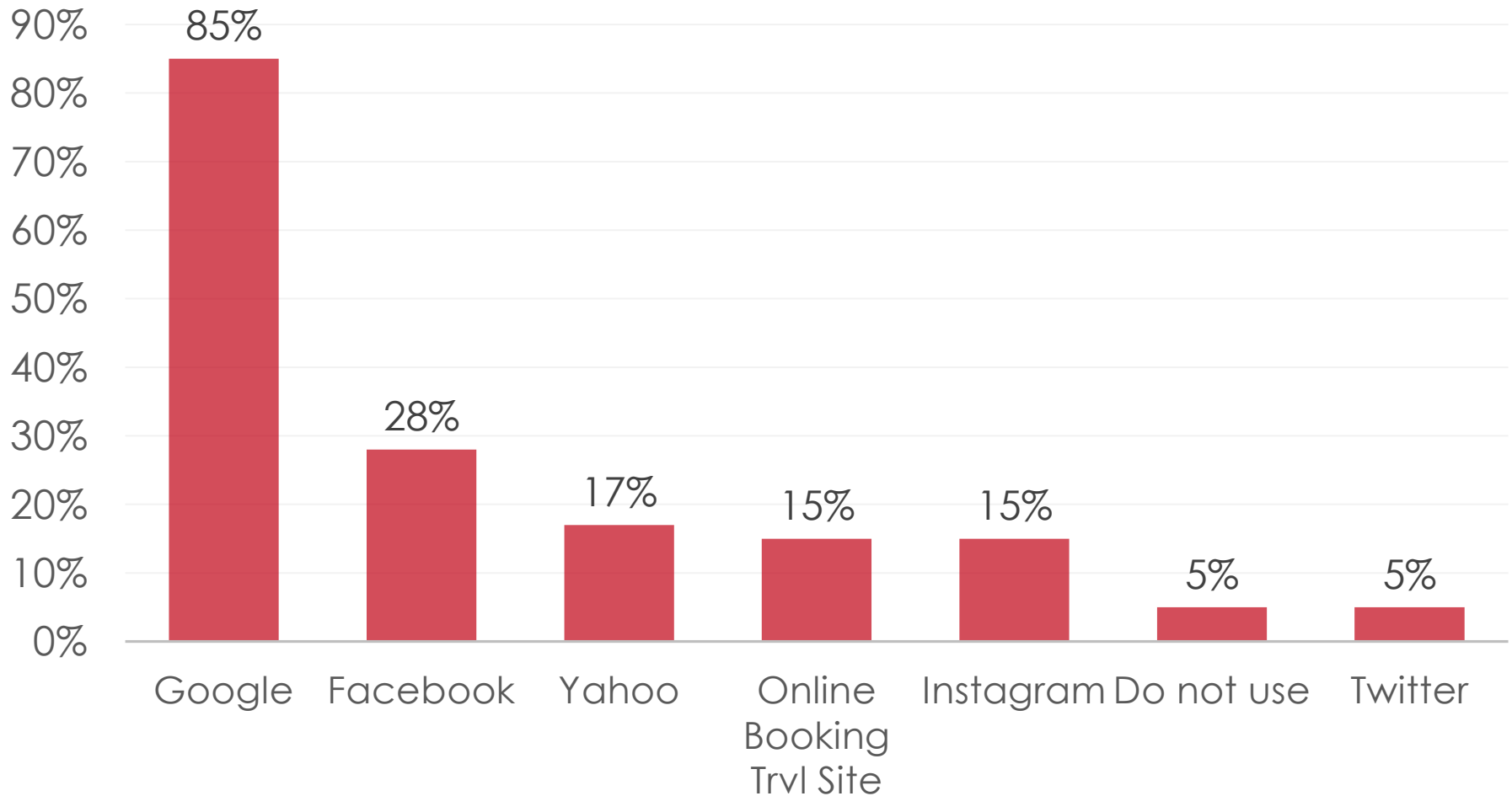
# PROMOTIONS

# INTERNET- GUAM SOURCES OF INFORMATION



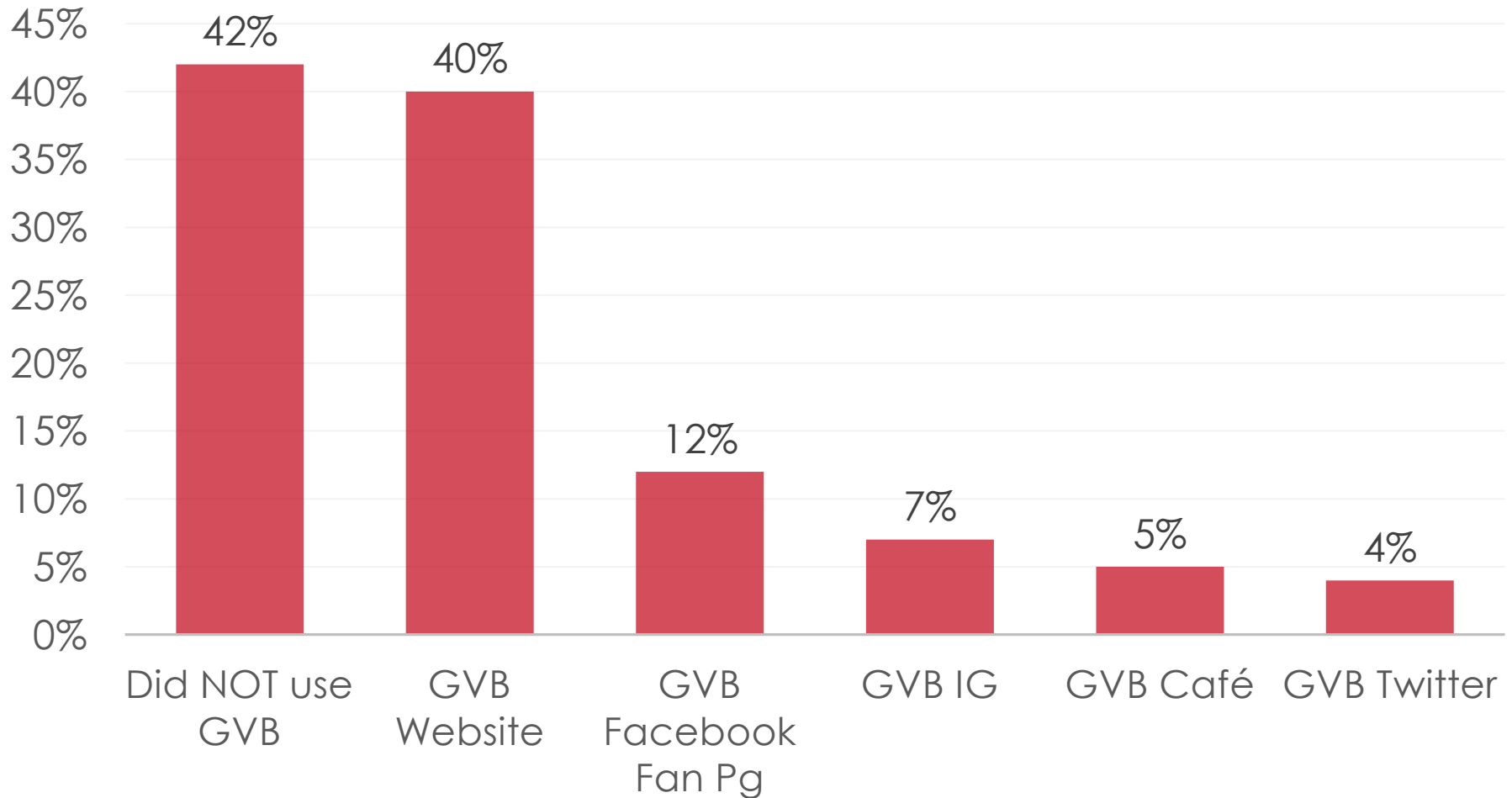
# INTERNET- SOURCES OF INFORMATION

## Things to do on Guam

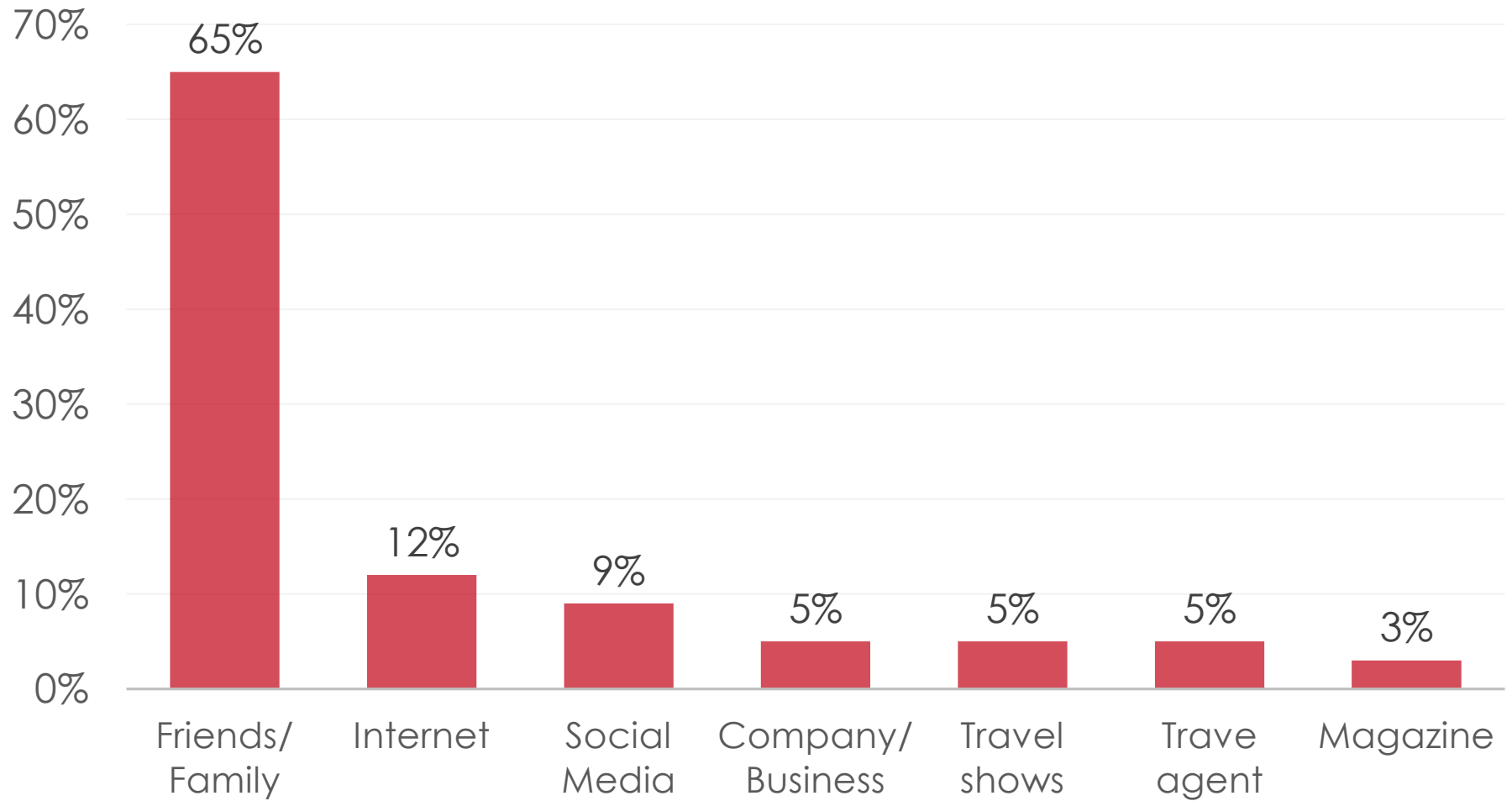


# INTERNET- SOURCES OF INFORMATION

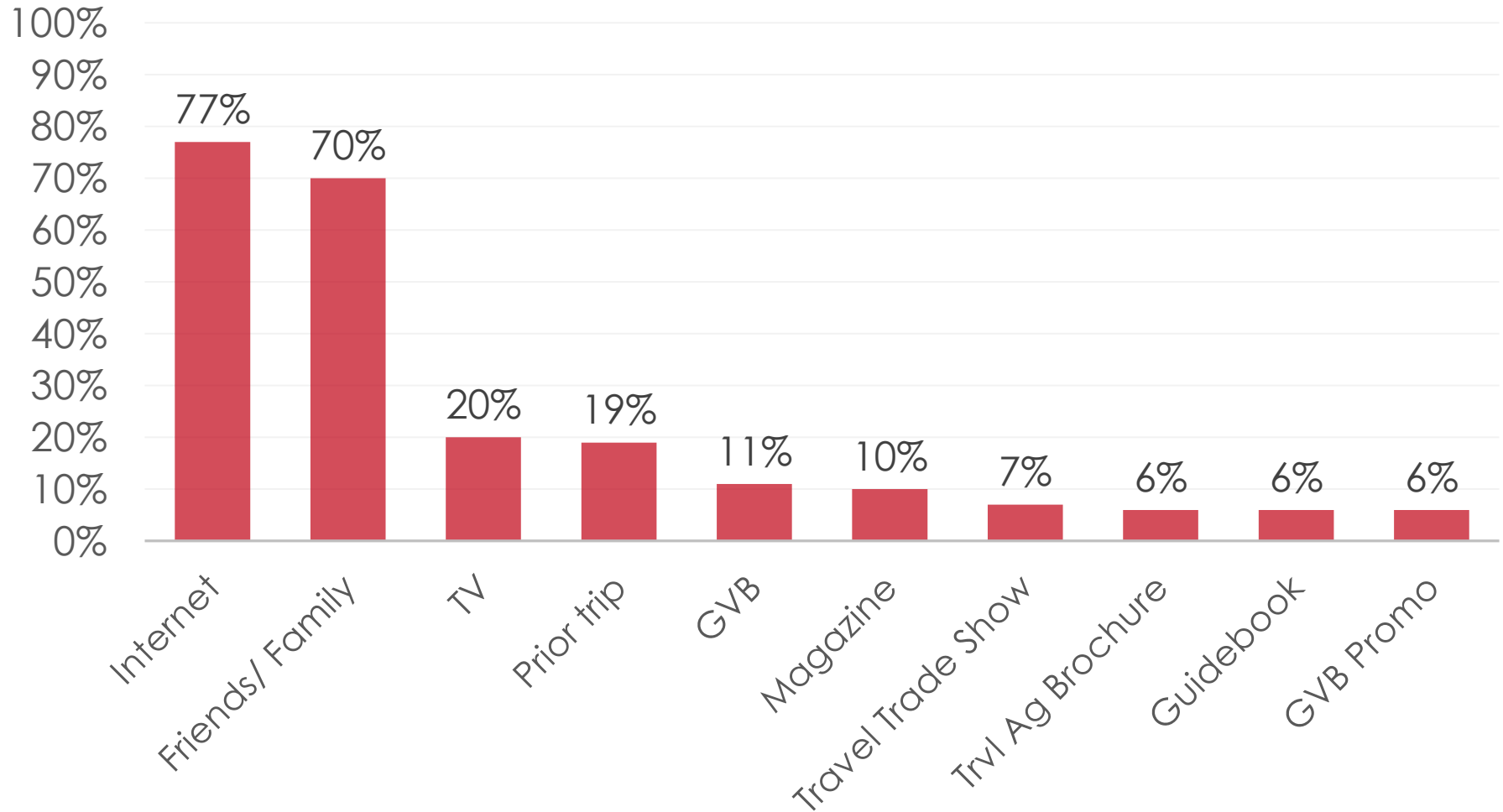
## GVB



# 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:**

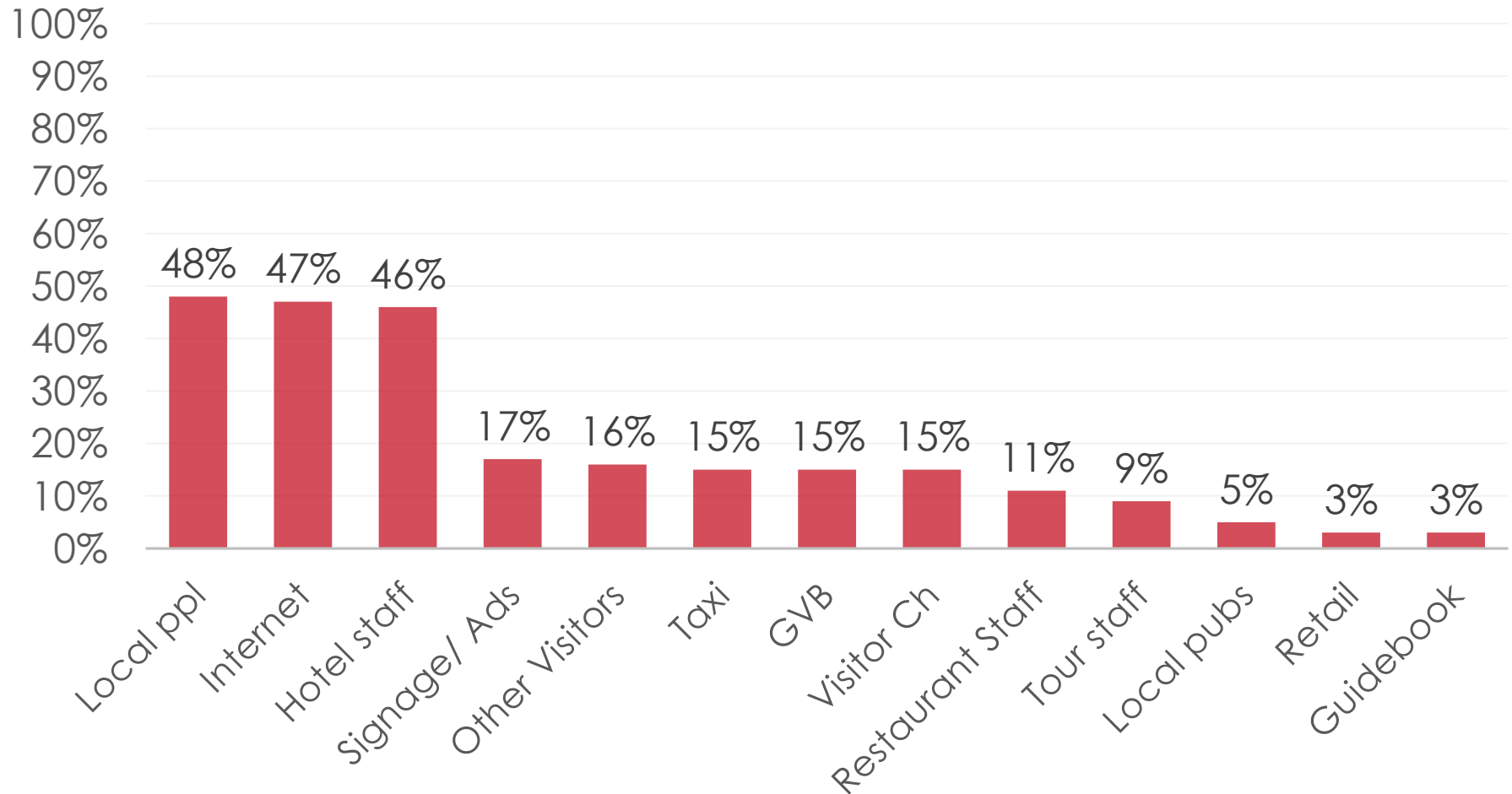
	TOTAL	MICE	LEISURE	FIT	FAMILY
	-	-	-	-	-
Q1 Internet/Mobile App	77%		78%	78%	79%
Friend or relative	70%		68%	75%	74%
TV	20%		20%	24%	21%
I have been to Guam before	19%		19%	16%	18%
Guam Visitors Bureau office	11%		12%	9%	10%
Magazine (consumer)	10%		12%	11%	10%
Travel trade shows	7%		7%	3%	1%
Travel agent brochure	6%		5%	3%	9%
Travel guide book at bookstores	6%		5%	6%	6%
Co-worker/ company travel department	6%		6%	7%	6%
Guam Visitors Bureau promotional activities	6%		7%	6%	6%
Newspaper	4%		4%	2%	4%
Consumer travel shows	1%		1%	1%	1%
Total	110		94	87	68

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:

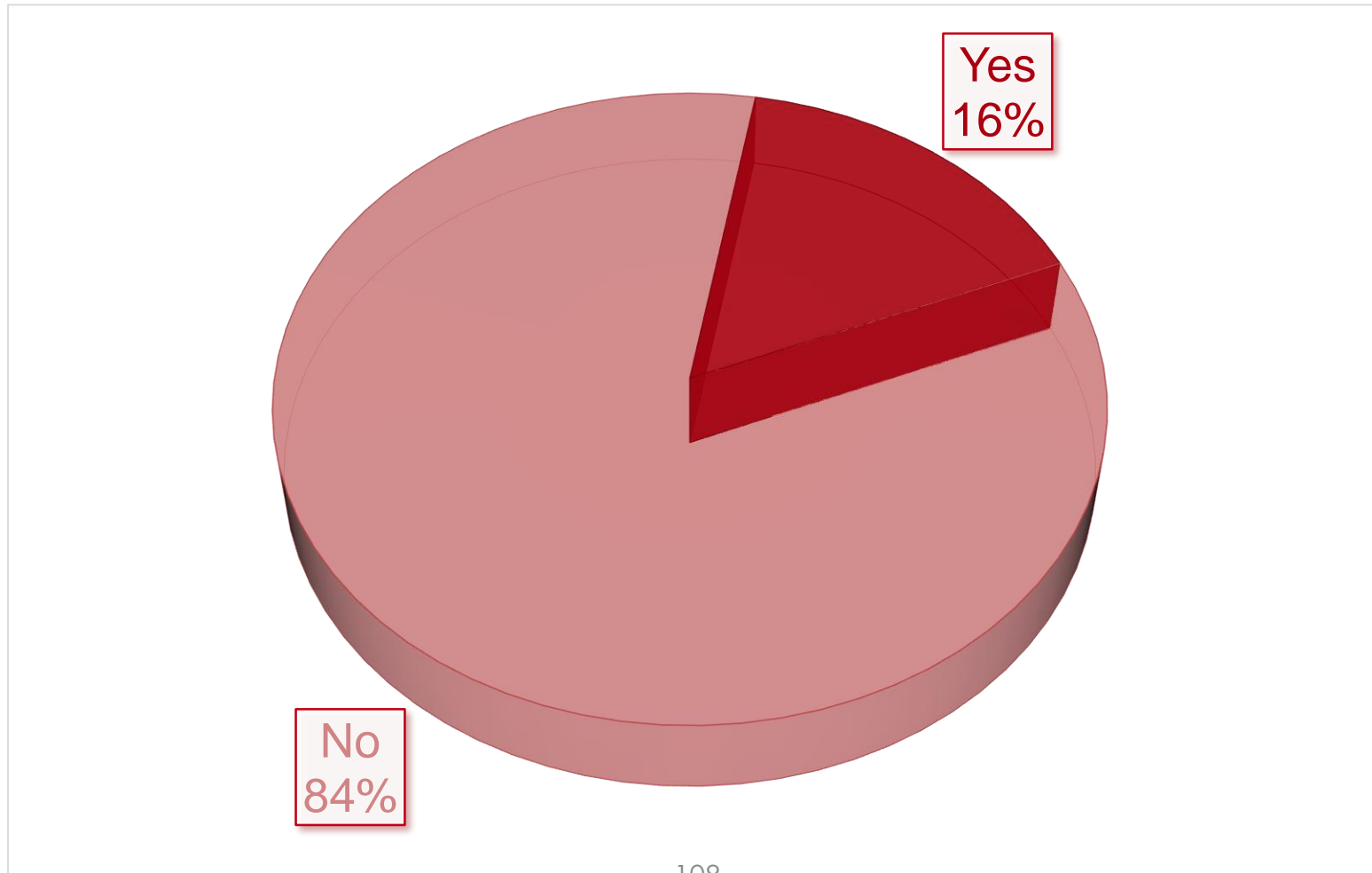
		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q2	Local people	48%		50%	44%	49%
	Internet/Mobile App	47%		48%	49%	46%
	Hotel staff	46%		45%	46%	49%
	Signs/ advertisement	17%		15%	18%	18%
	Other visitors	16%		14%	16%	16%
	Taxi drivers	15%		14%	16%	21%
	Visitors channel	15%		14%	15%	13%
	Guam Visitors Bureau	15%		15%	13%	6%
	Restaurant staff (outside hotel)	11%		11%	11%	10%
	Tour staff	9%		11%	5%	9%
	Local publication	5%		5%	5%	6%
	Retail staff	3%		2%	3%	3%
	Guide books I brought with me	3%		3%	3%	4%
	Total	109		94	87	68

Prepared by Anthology Research

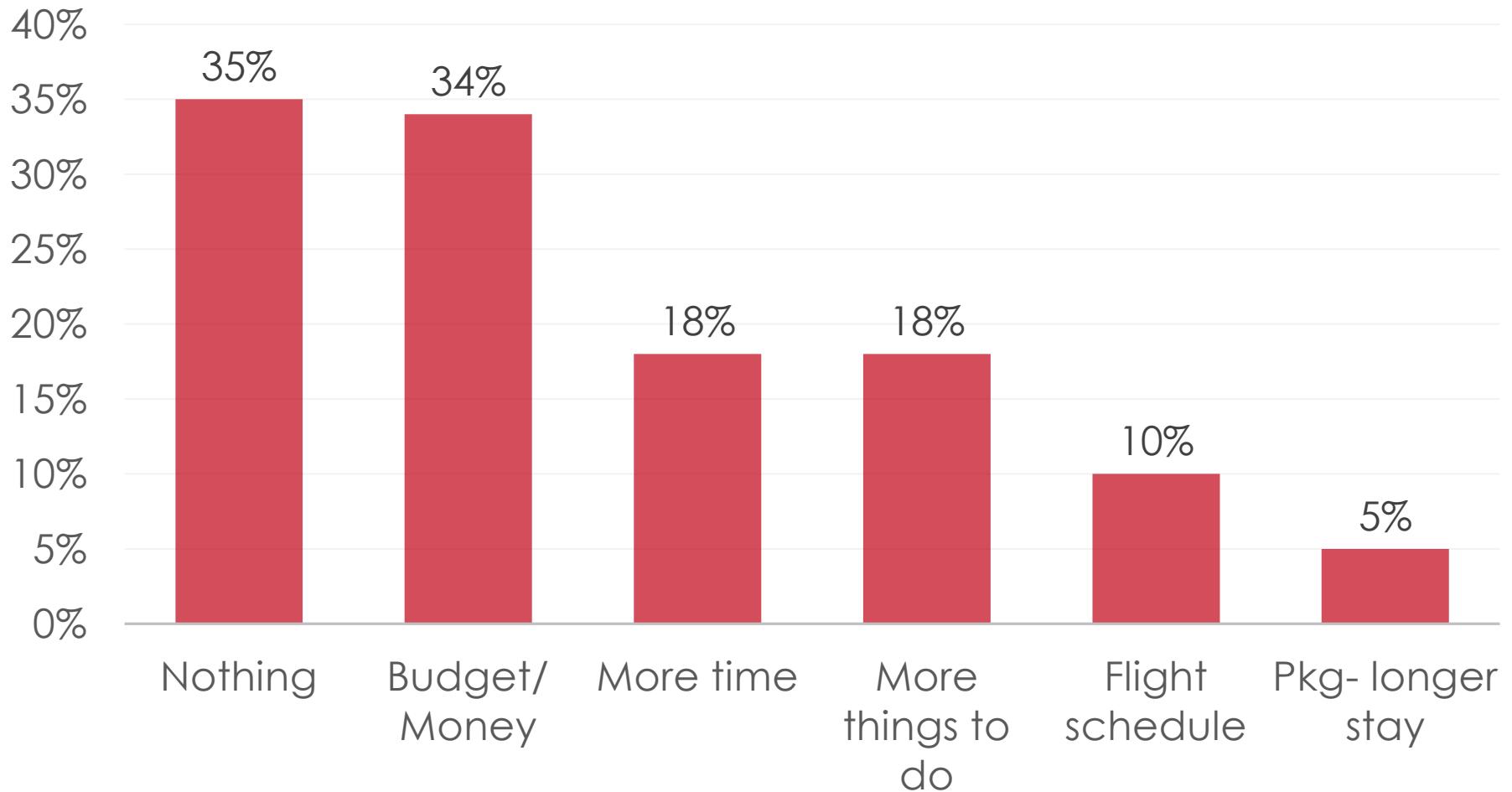
# SECTION 6

## FUTURE TRAVEL TO GUAM

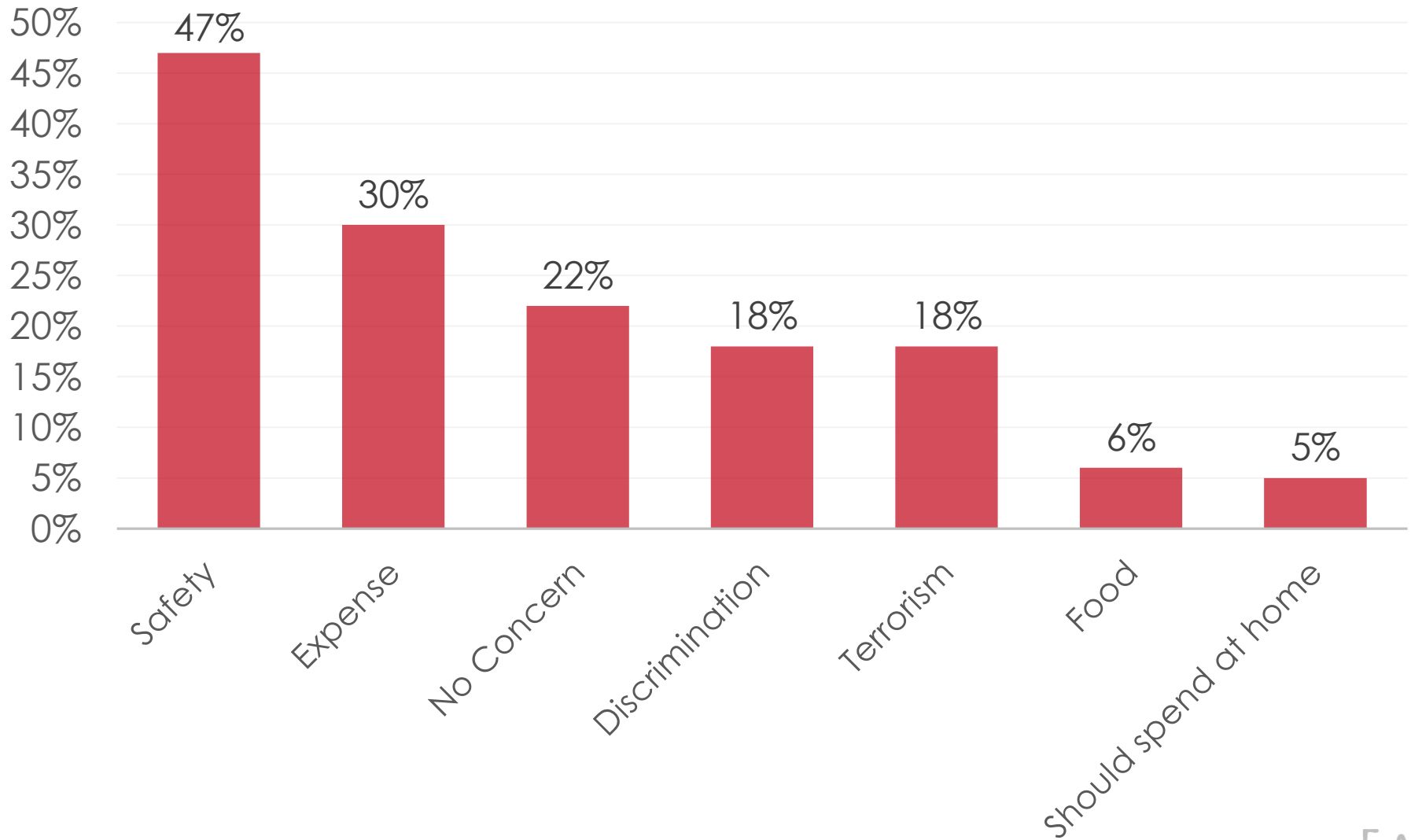
# Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



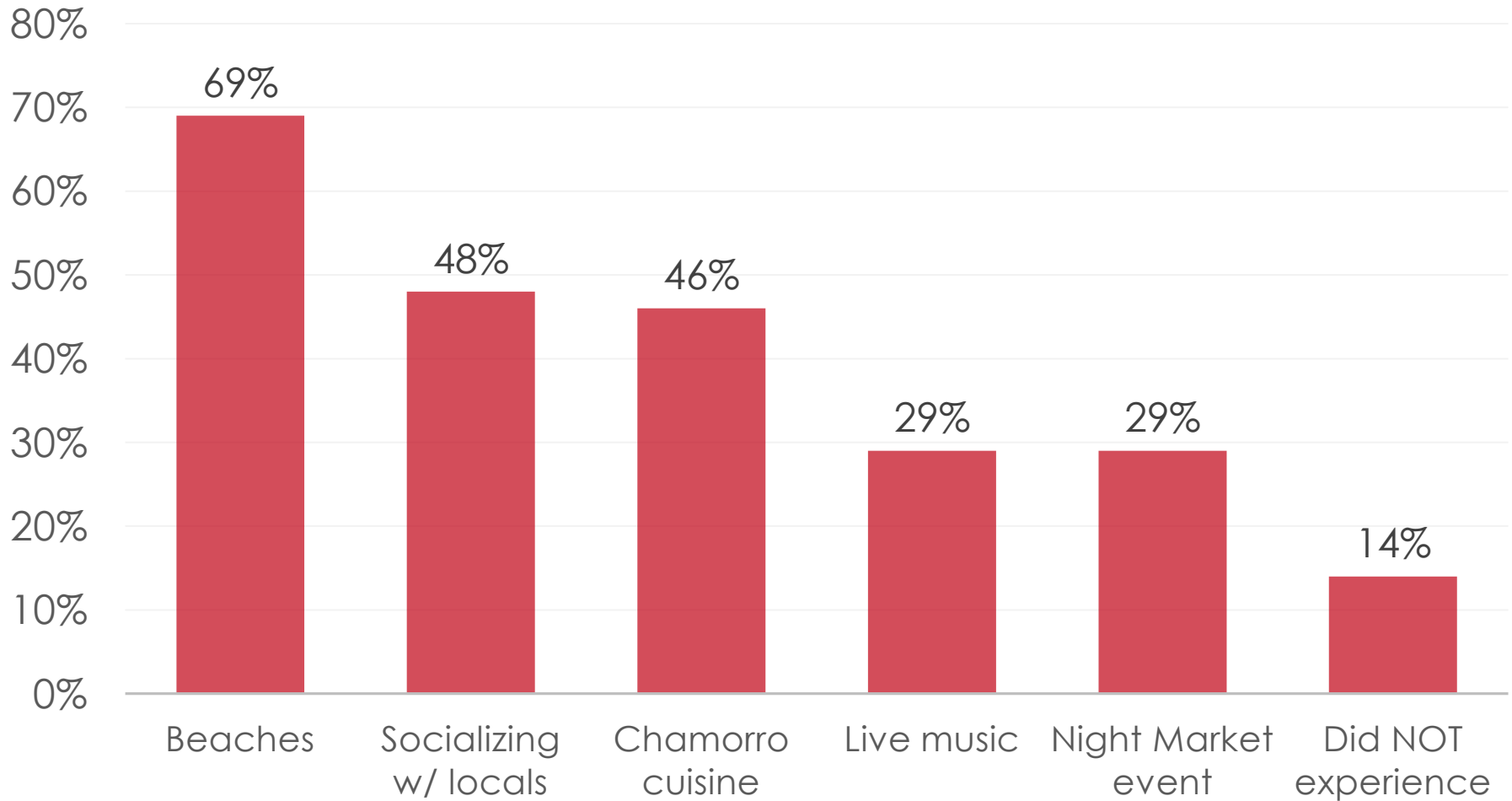
# FUTURE TRAVEL CONCERNS



# SECTION 7

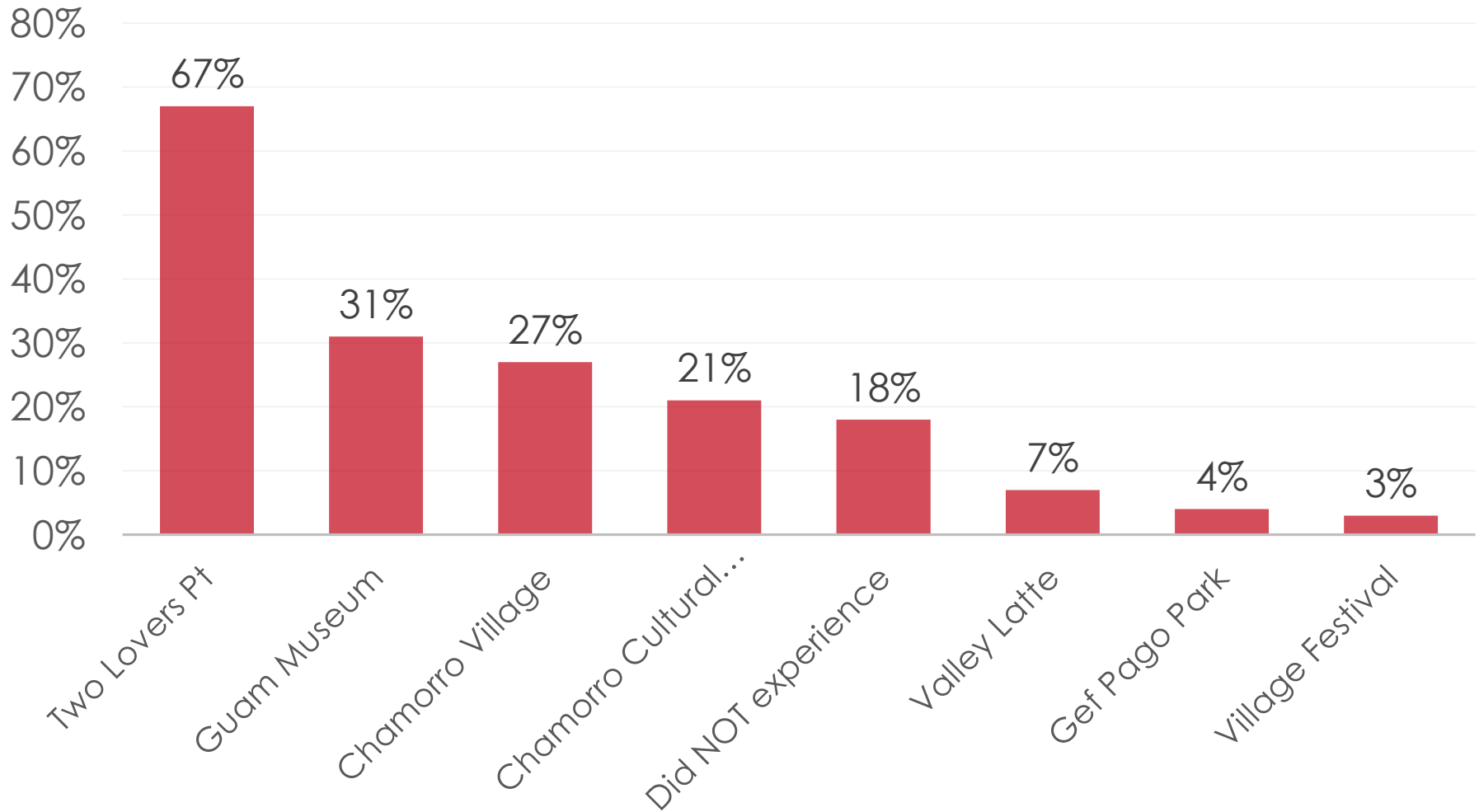
## GUAM CULTURE

# EXPERIENCED- CHAMORRO/ HAFA ADAI SPIRIT

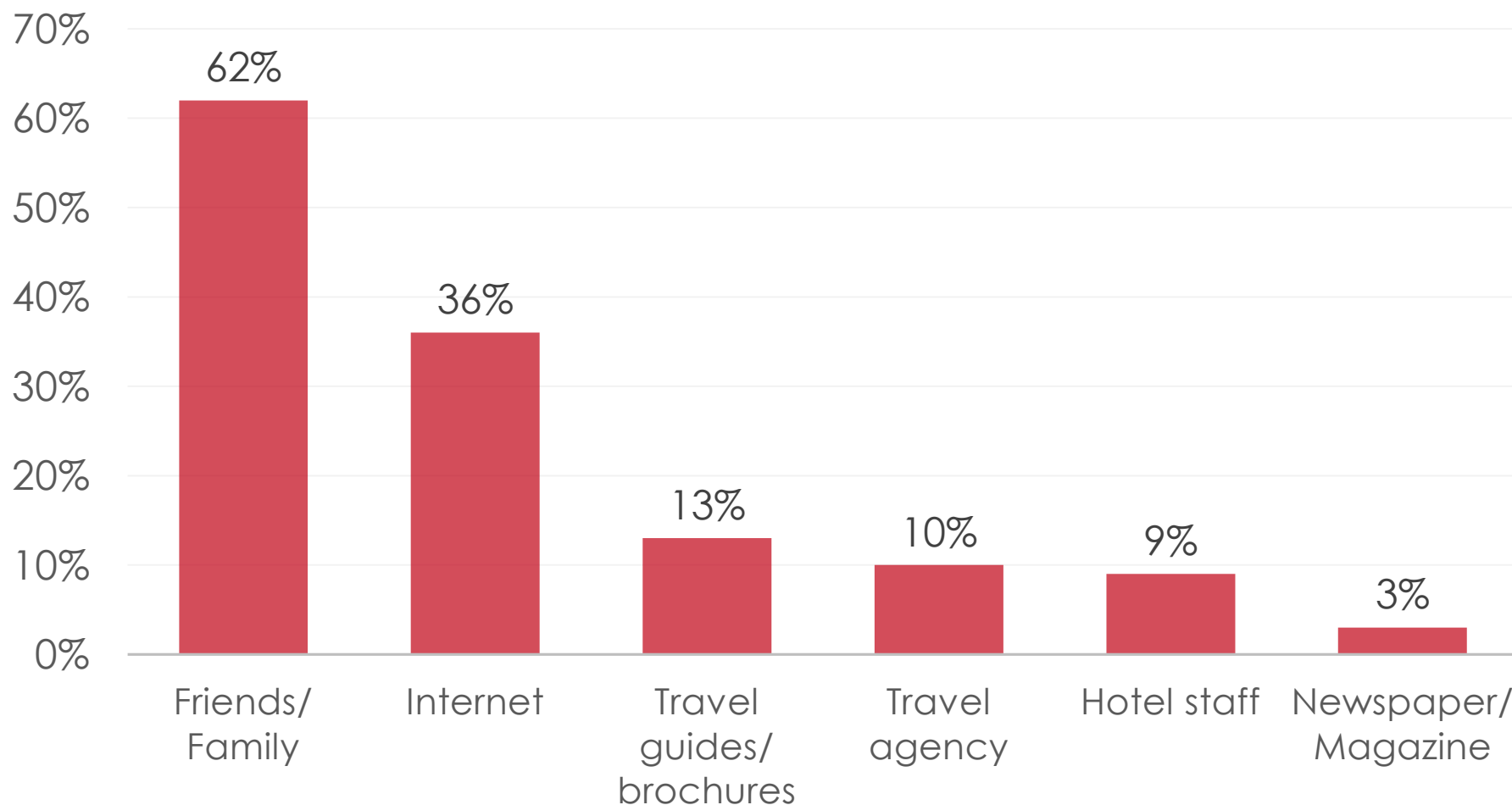




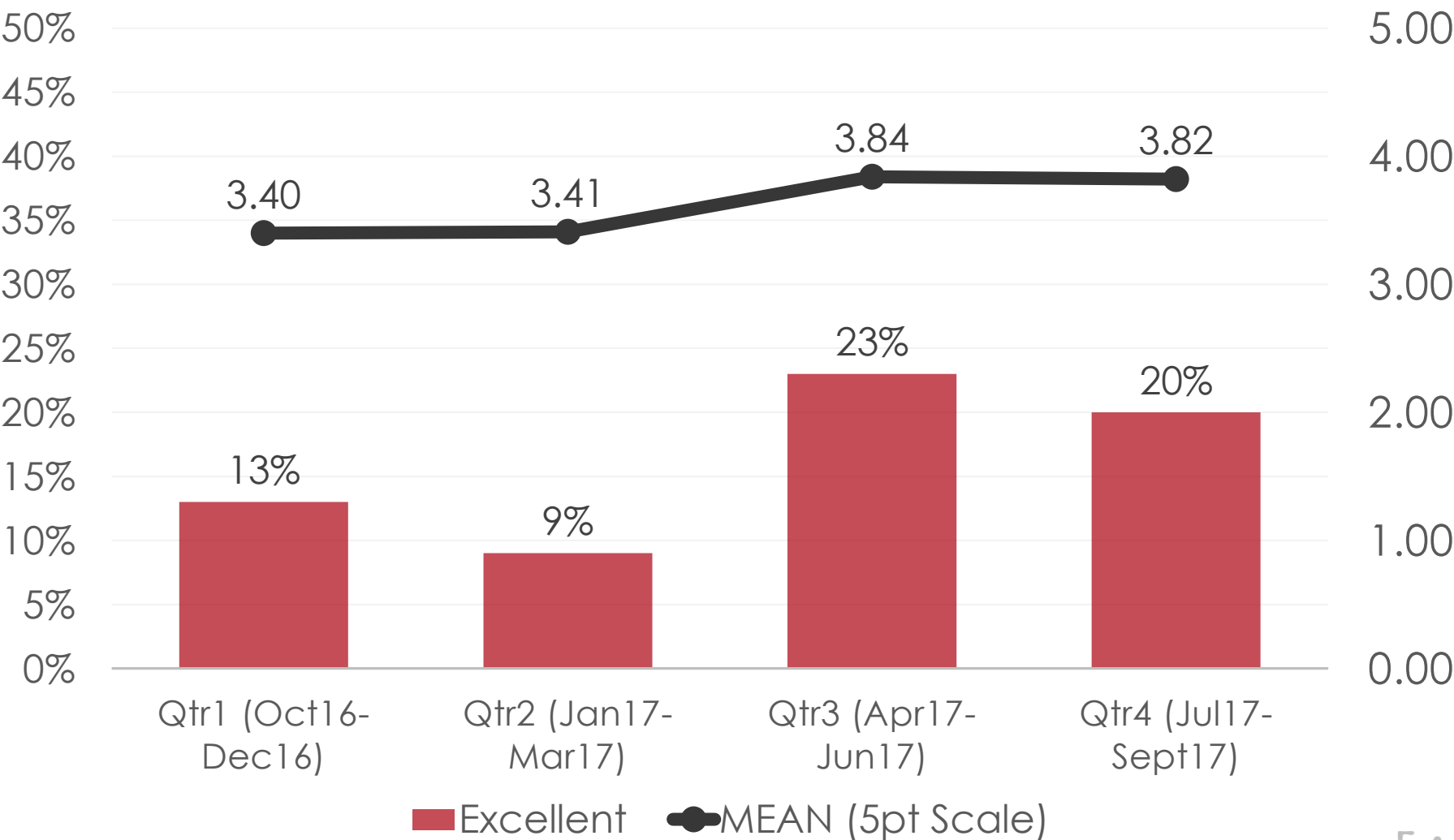
# EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



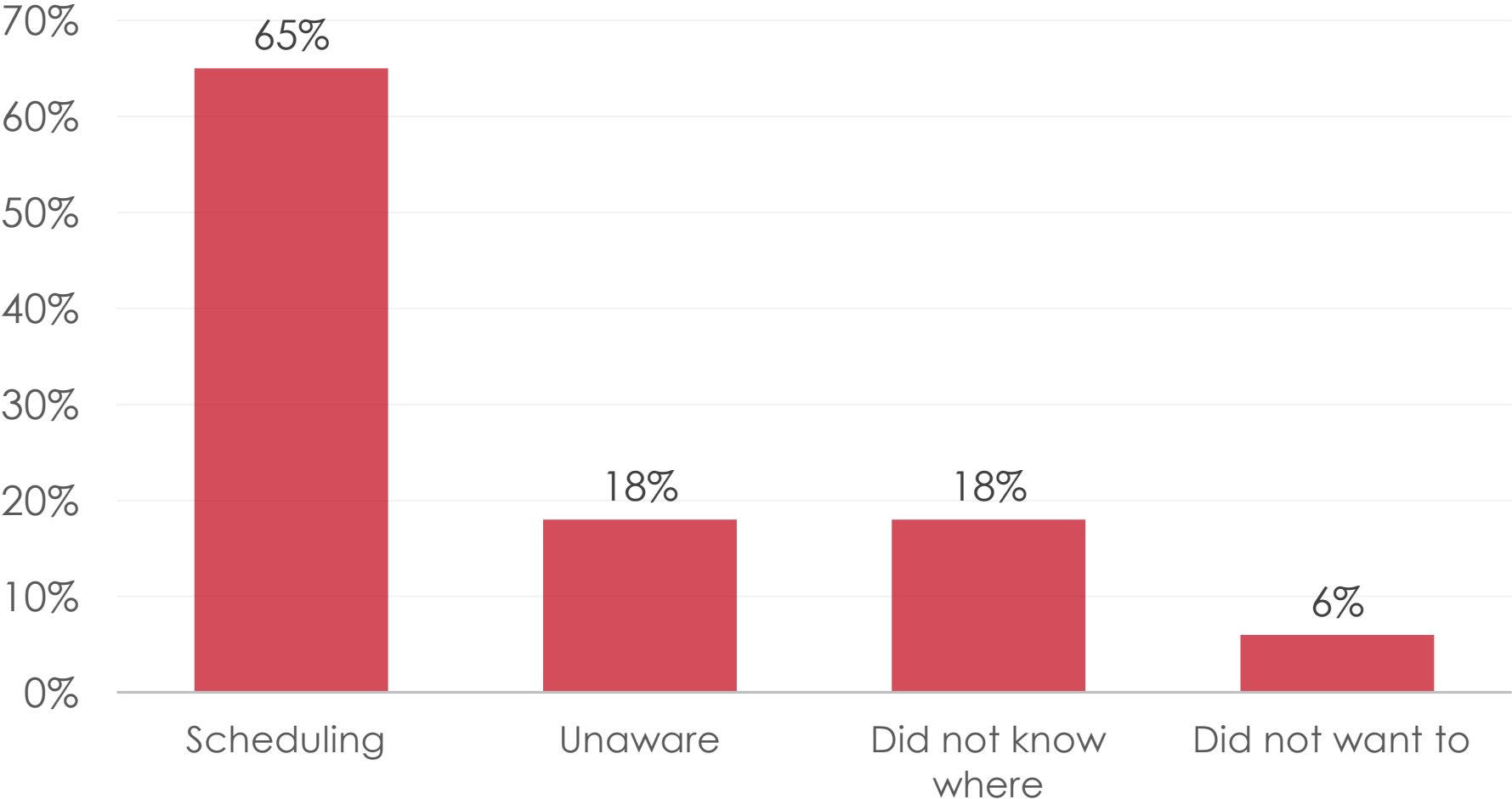
# SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



# 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, 3rd and 4th Quarters 2017 and Overall 2017					
	1st Qtr. 2017	2nd Qtr. 2017	3rd Qtr. 2017	4th Qtr. 2017	1-4 Qtr Overall 2017
Drivers:	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks					3
Ease of getting around					
Safety walking around at night			1		
Quality of daytime tours					
Variety of daytime tours				3	
Quality of nighttime tours				2	2
Variety of nighttime tours					
Quality of shopping	4				5
Variety of shopping		2			
Price of things on Guam	2				
Quality of hotel accommodations		4			
Quality/cleanliness of air, sky	1			1	1
Quality/cleanliness of parks	3				
Quality of landscape in Tumon					4
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%	72.9%	76.9%

# Drivers of Overall Satisfaction

- **Overall satisfaction** with Filipino visitor's experience on Guam is driven by three significant factors in the 4th Quarter 2017 Period. By rank order they are:
  - **Quality/cleanliness of air, sky,**
  - **Quality of night time tours, and**
  - **Variety of day time tours.**
- With all three factors the overall  $r^2$  is .729 meaning that **72.9% of overall satisfaction is accounted for by these factors.**



# Drivers – On-Isle Expenditures

Drivers of Per Person On Island Expenditures, 1st, 2nd, 3rd and 4th Qtr. 2017 and Overall 2017					
	1st Qtr. 2017	2nd Qtr 2017	3rd Qtr 2017	4th Qtr. 2017	1-4 Qtr Overall 2017
Drivers:	rank	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%	<b>0.0%</b>	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 4th Quarter 2017 period.