

Guam Visitors Bureau

Philippine Visitor Tracker Exit Profile & Market Segmentation Report

FY2018

QTR.3 (APR-JUN 2018)

Prepared by: Anthology Research

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GUAM

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 **102** 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 **102** is +/- 9.3 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 +/- 9.3 percentage points.

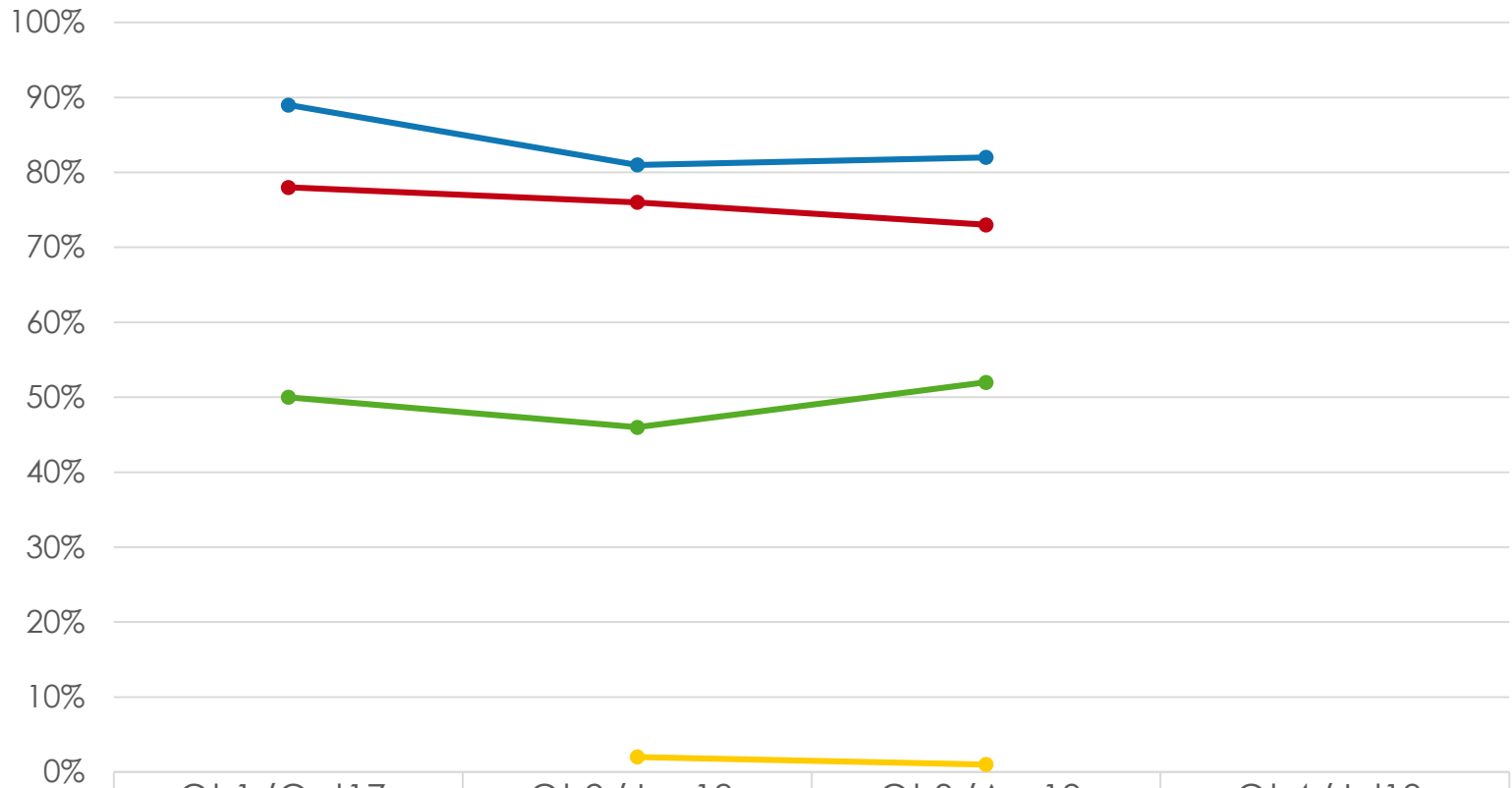
Objectives

- To monitor the effectiveness of the Philippine 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 Philippine 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

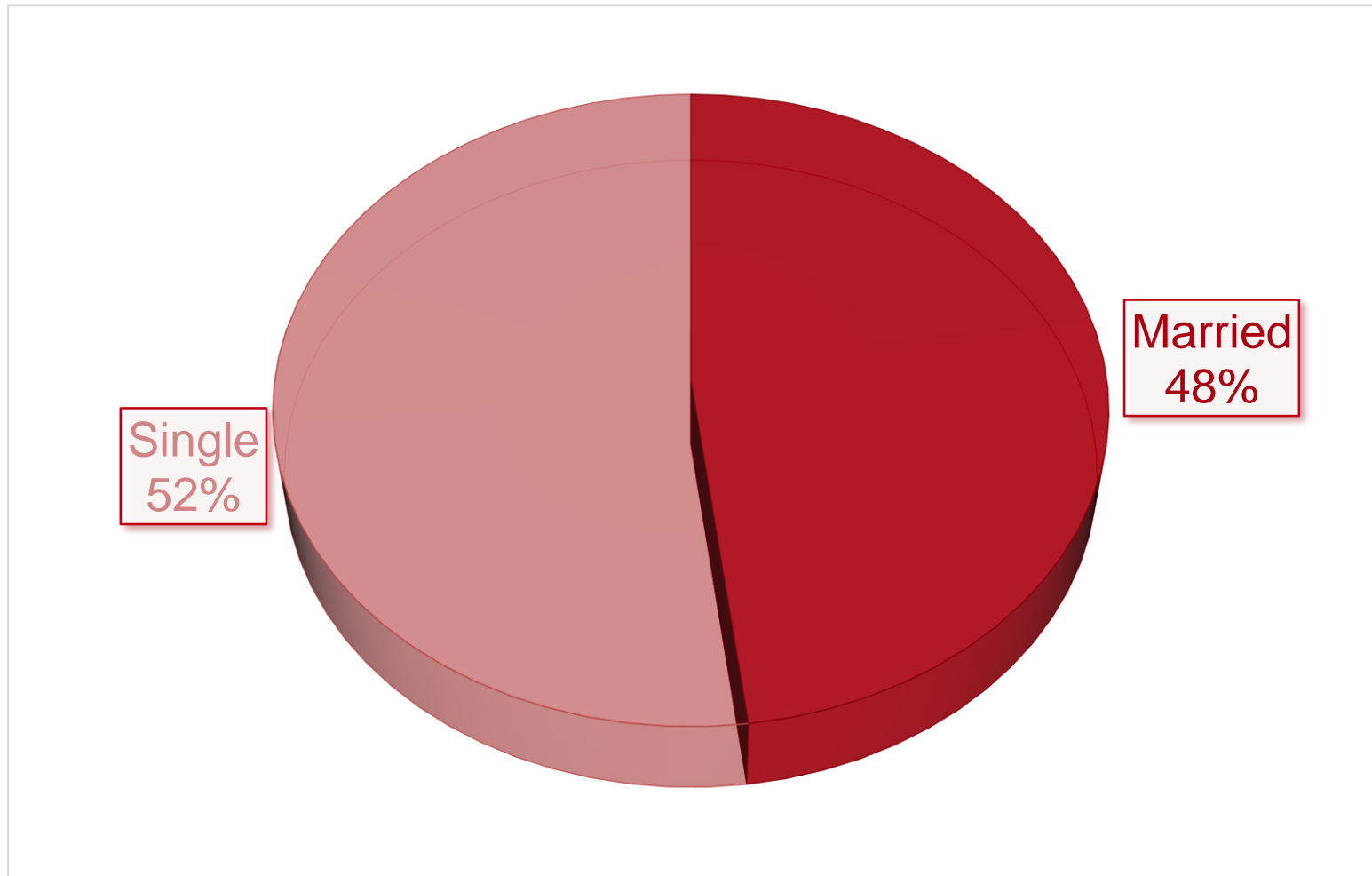


	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)
● FITs	89%	81%	82%	
● Leisure Trvl	78%	76%	73%	
● Family	50%	46%	52%	
● MICE		2%	1%	

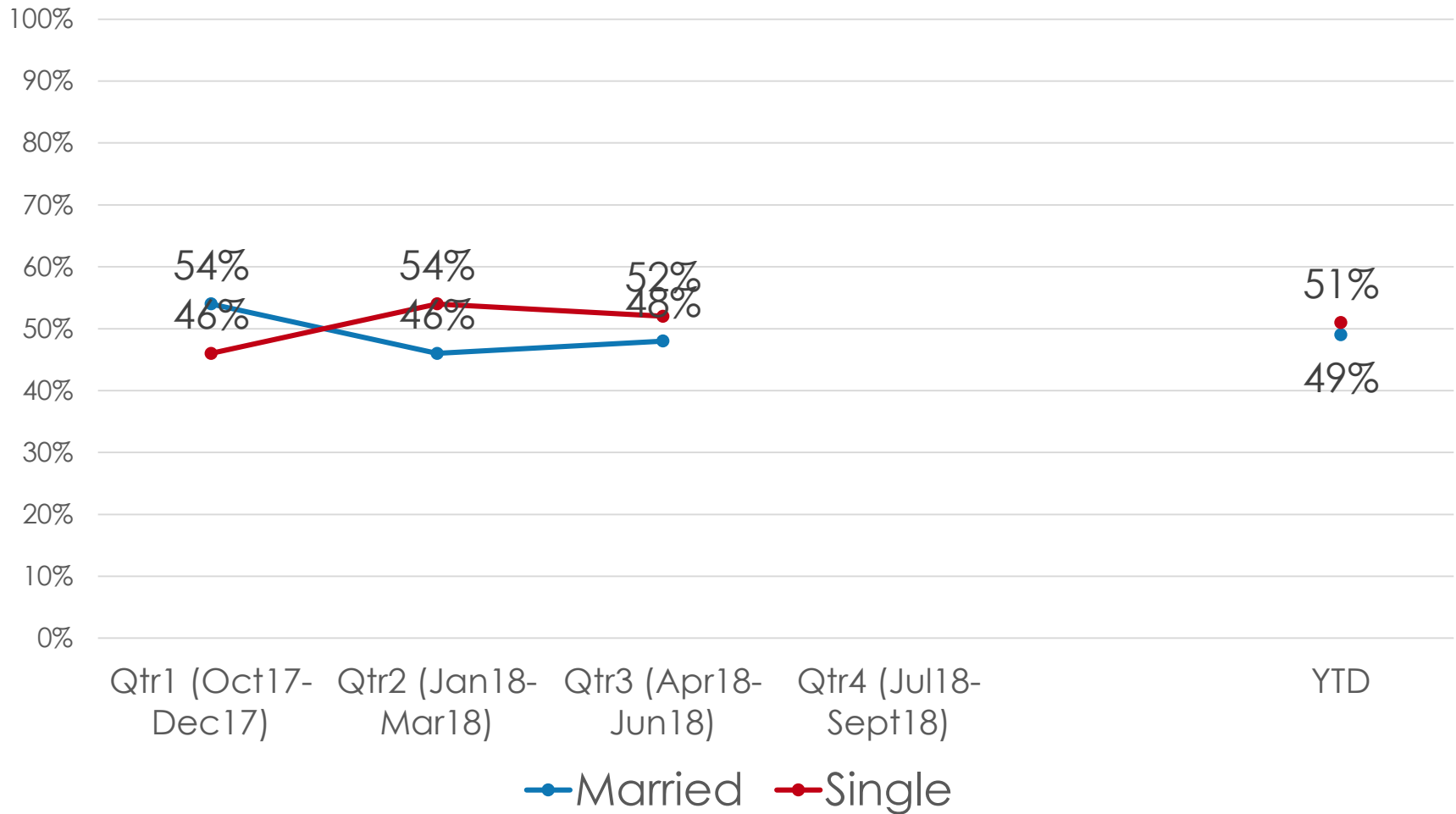
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2018 Tracking



Marital status – Key Segments

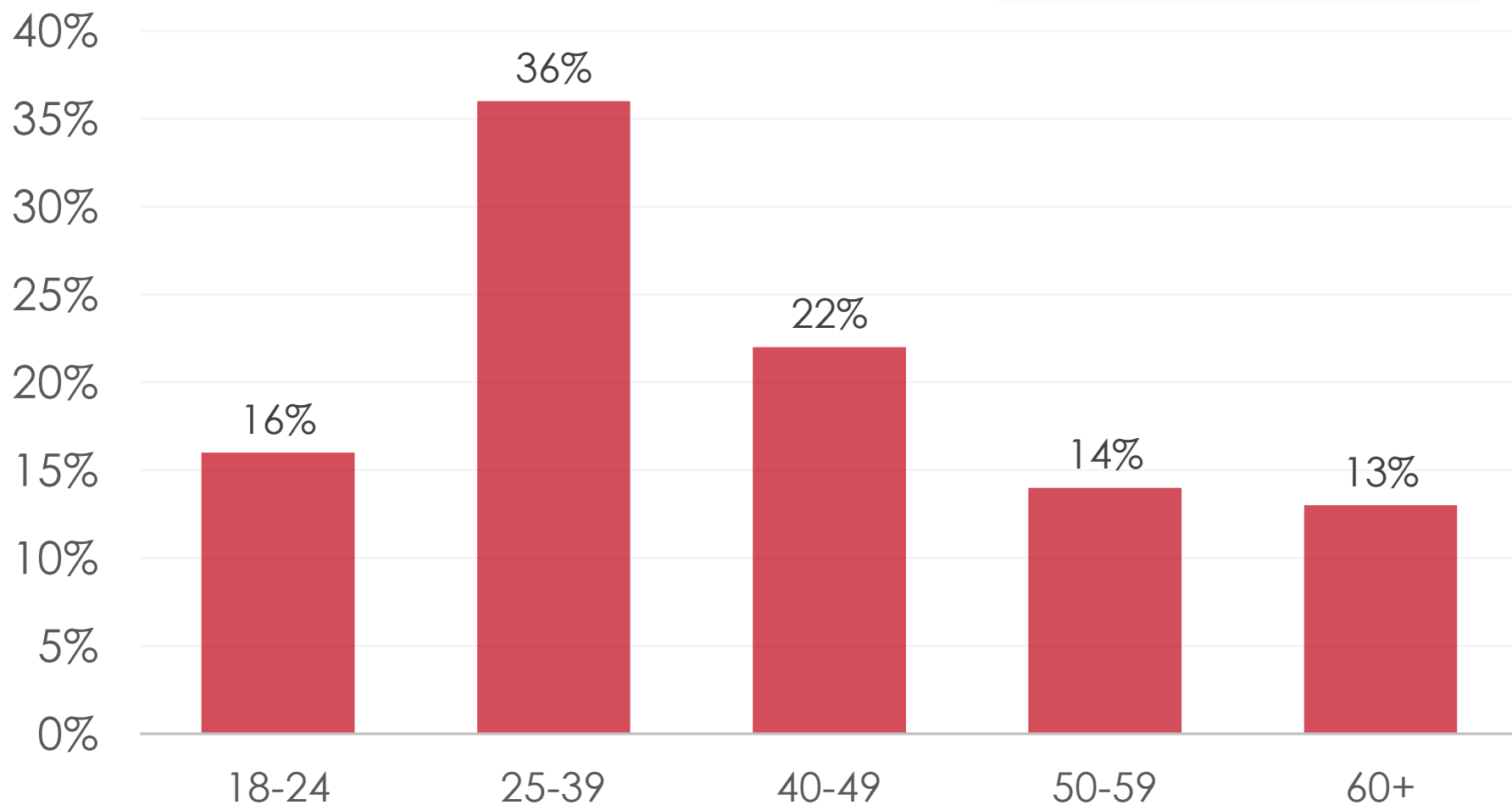
GVB EXIT SURVEY
QE MARITAL STATUS

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
QE	Married	48%		47%	42%	60%
	Single	52%	100%	53%	58%	40%
	Total	102	1	74	84	53

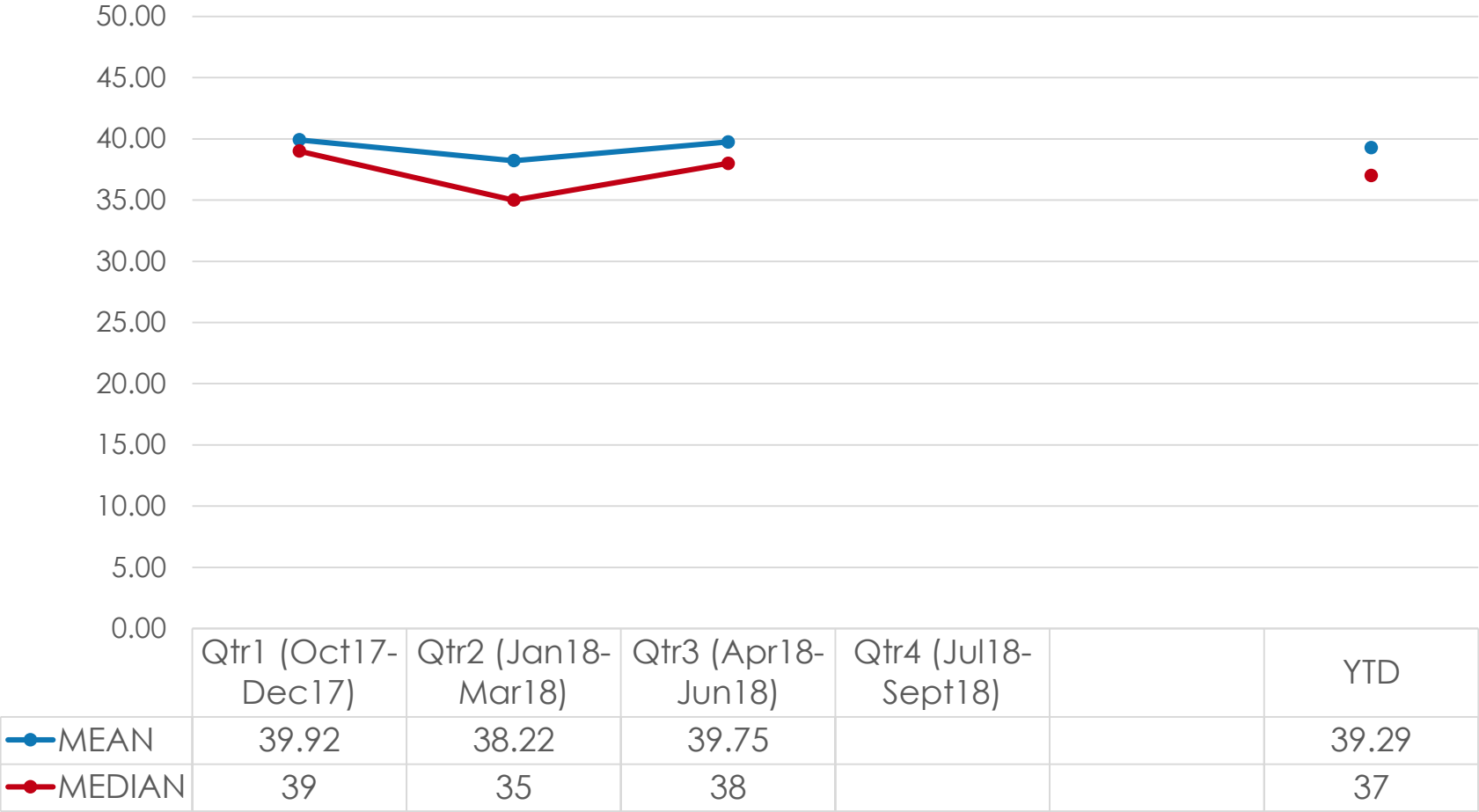
Prepared by Anthology Research

Age

MEAN = 39.75
MEDIAN = 38



Age – FY2018 Tracking



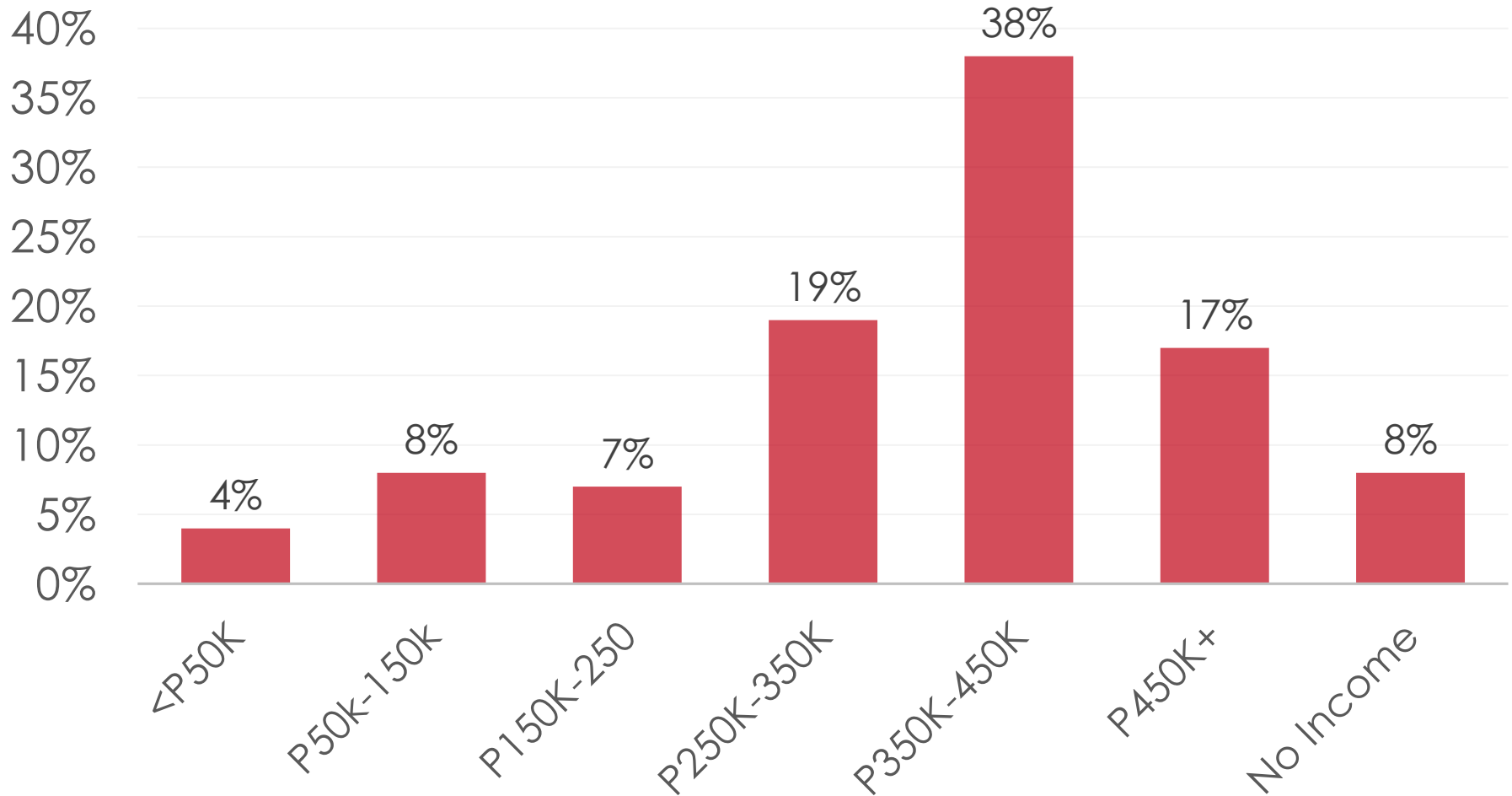
Age – Key Segments

GVB EXIT SURVEY
AGE

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
SD	18-24	16%		14%	18%	17%
	25-39	36%	100%	41%	40%	26%
	40-49	22%		23%	21%	26%
	50-59	14%		15%	8%	19%
	60+	13%		8%	12%	11%
	Total	102	1	74	84	53
SD	Mean	39.75	31.00	38.88	38.00	40.83
	Median	38	31	37	35	43

Prepared by Anthology Research

Annual Household Income



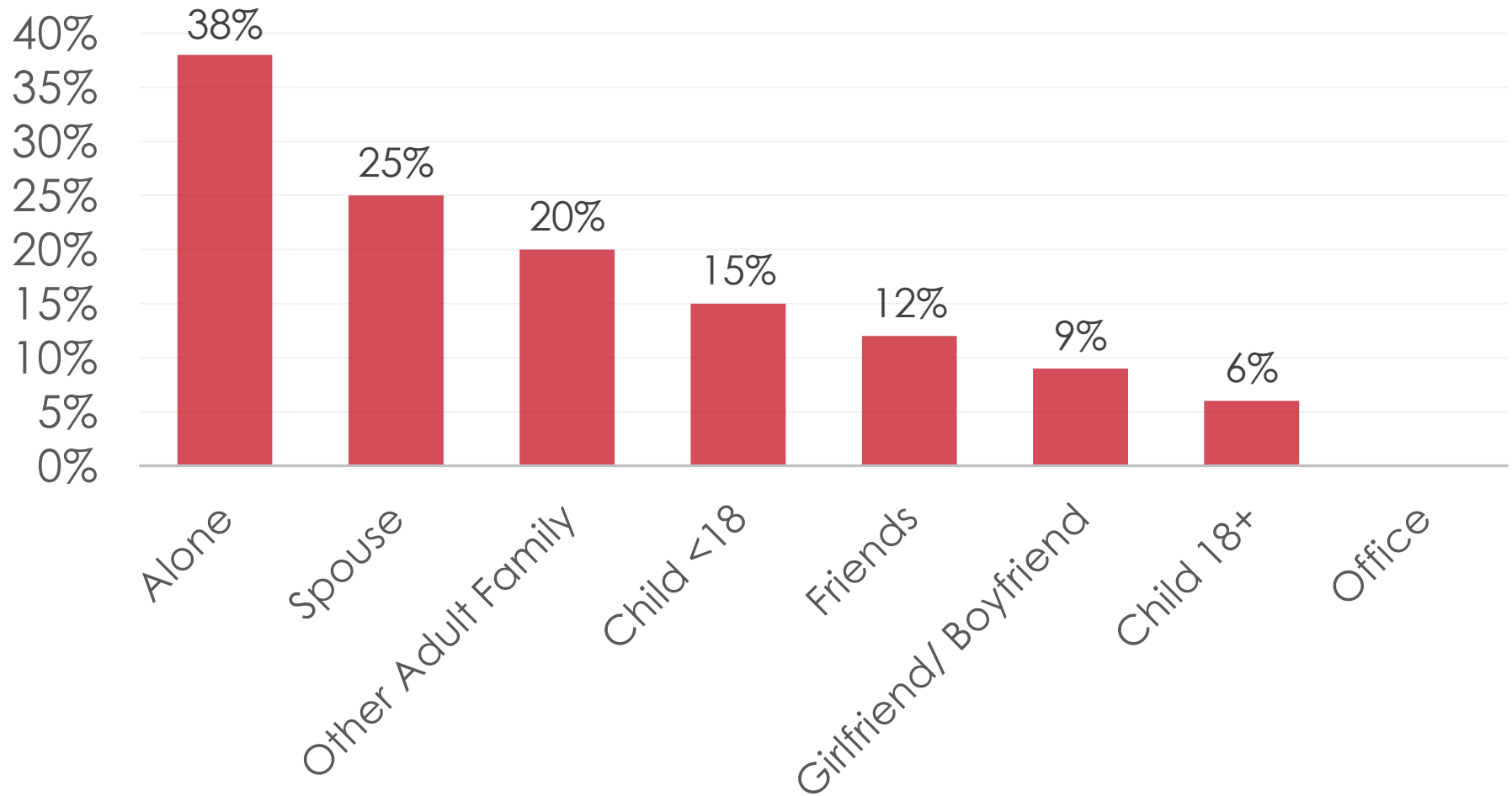
Annual Household Income – Key Segments

GVB EXIT SURVEY
Q26 Household income:

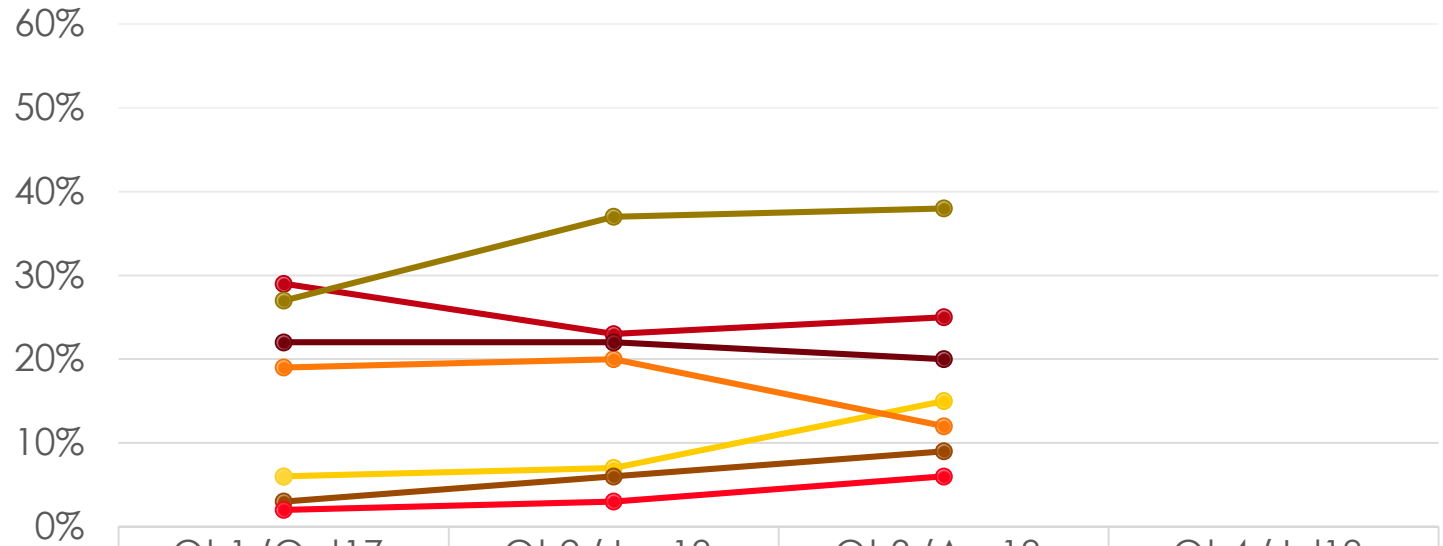
		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q26	Up to P50K	4%		3%	4%	6%
	P50K-P150K	8%		7%	8%	4%
	P150K-P250K	7%		9%	8%	12%
	P250K-P350K	19%		15%	23%	10%
	P350K-P450K	38%		43%	29%	44%
	P450K+	17%	100%	16%	18%	17%
	No Income	8%		7%	10%	8%
	Total	101	1	74	83	52

Prepared by Anthology Research

Travel Party

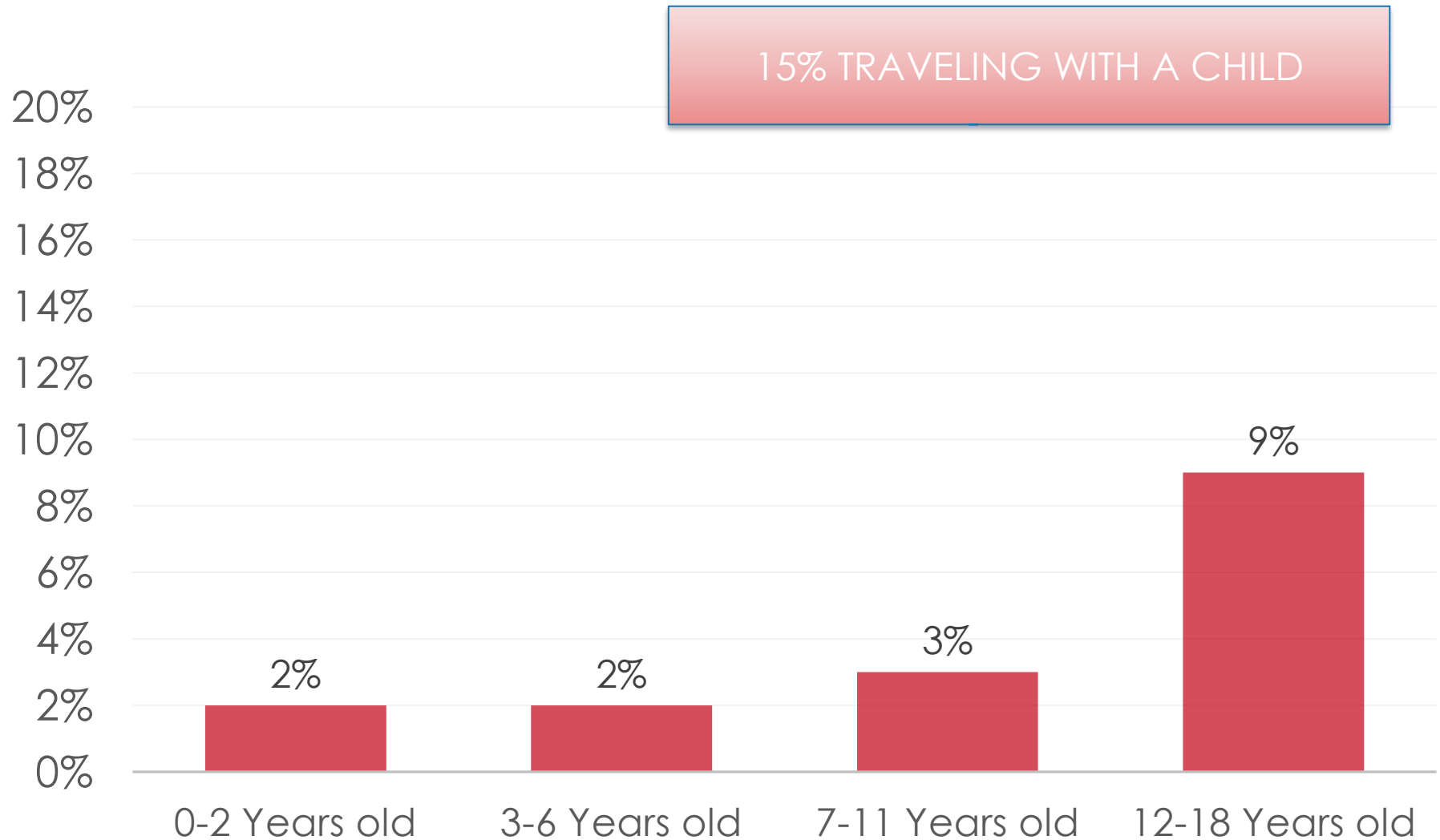


Travel Party

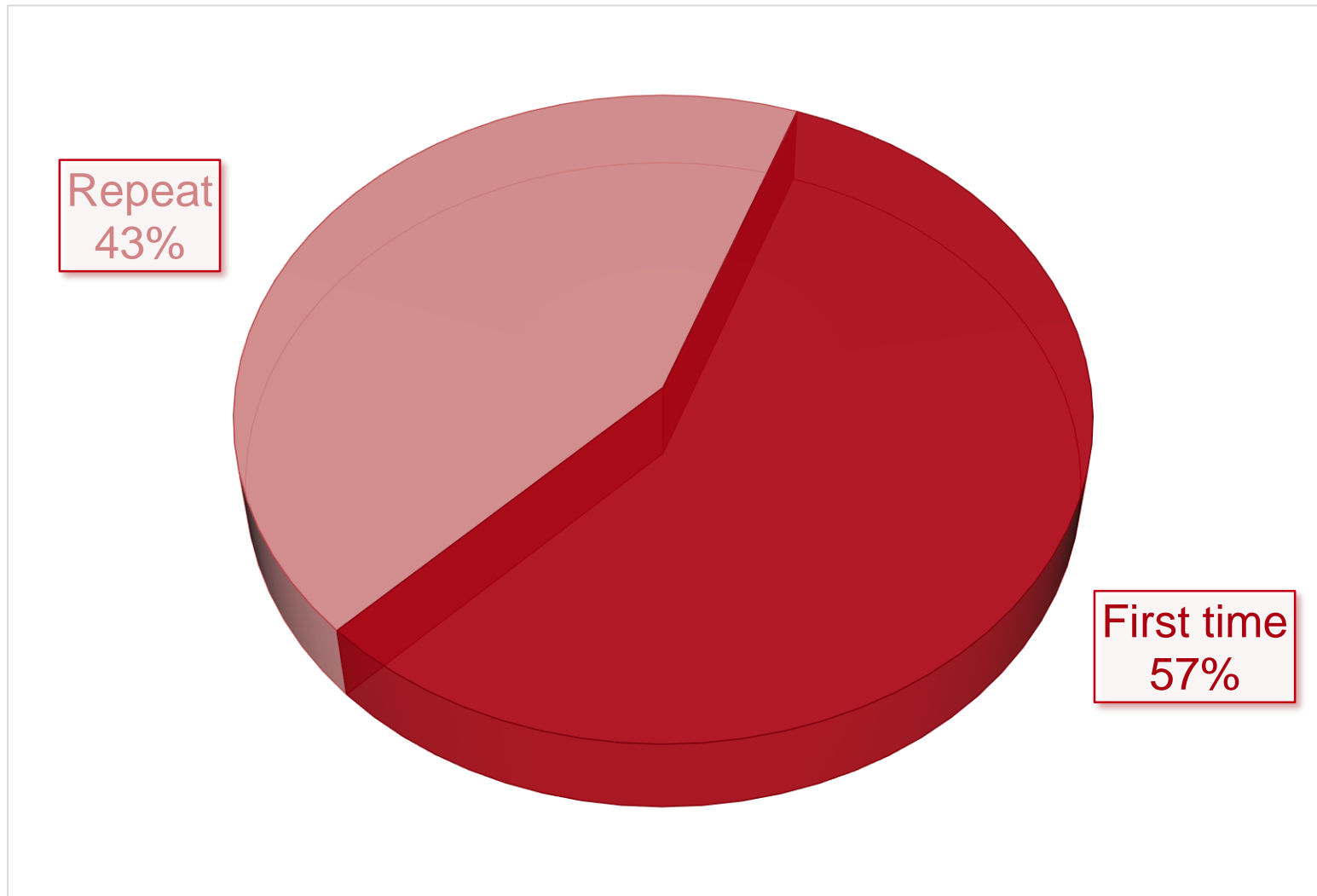


Spouse	29%	23%	25%	
Child <18	6%	7%	15%	
Friend/ Assoc	19%	20%	12%	
Other Adult Family	22%	22%	20%	
Alone	27%	37%	38%	
Girlfriend/ Boyfriend	3%	6%	9%	
Child- Adult	2%	3%	6%	
Office	6%			

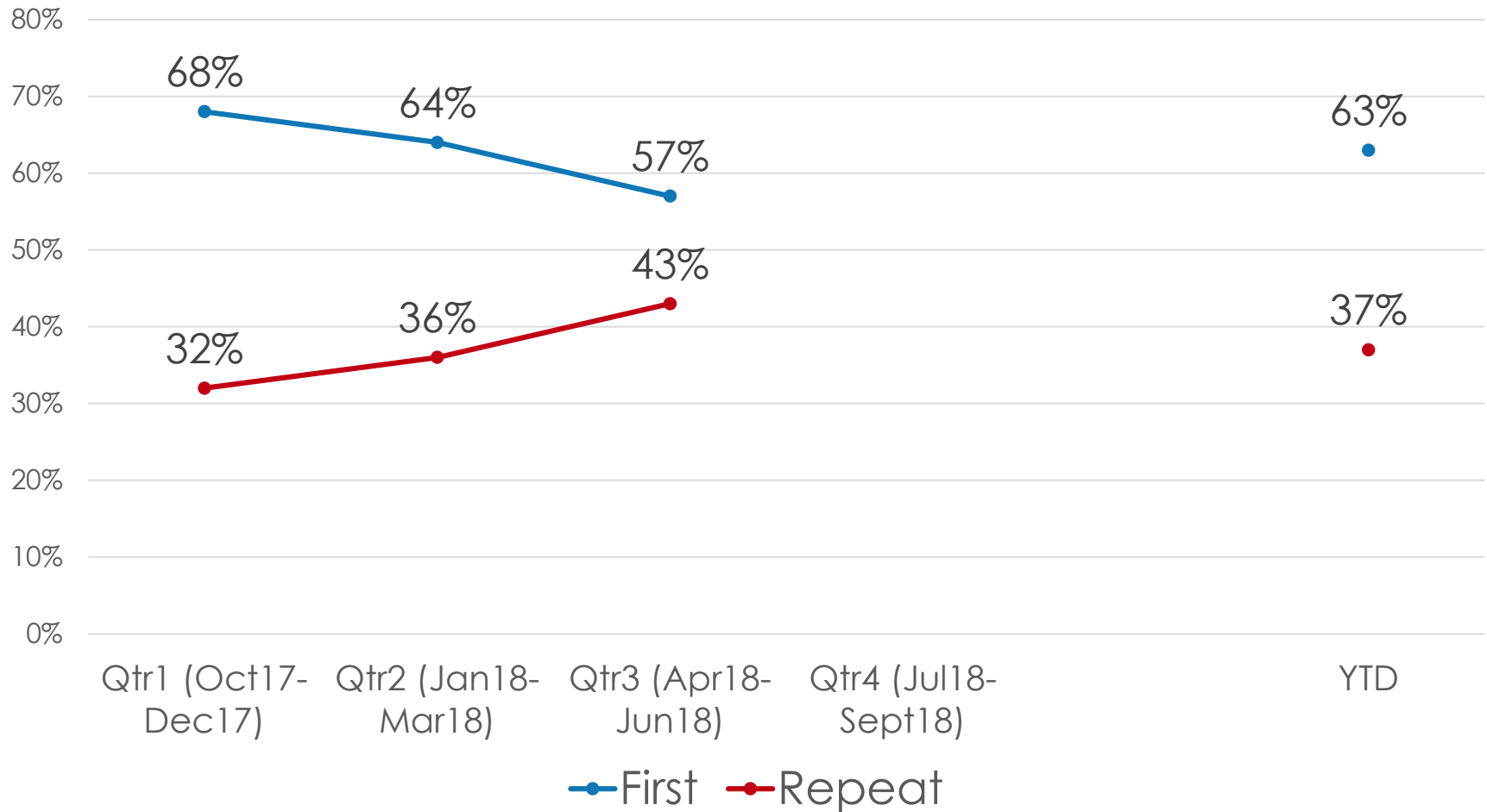
Travel Party - Children



Trips to Guam



Trips to Guam – FY2018 Tracking



Trips to Guam – Key Segments

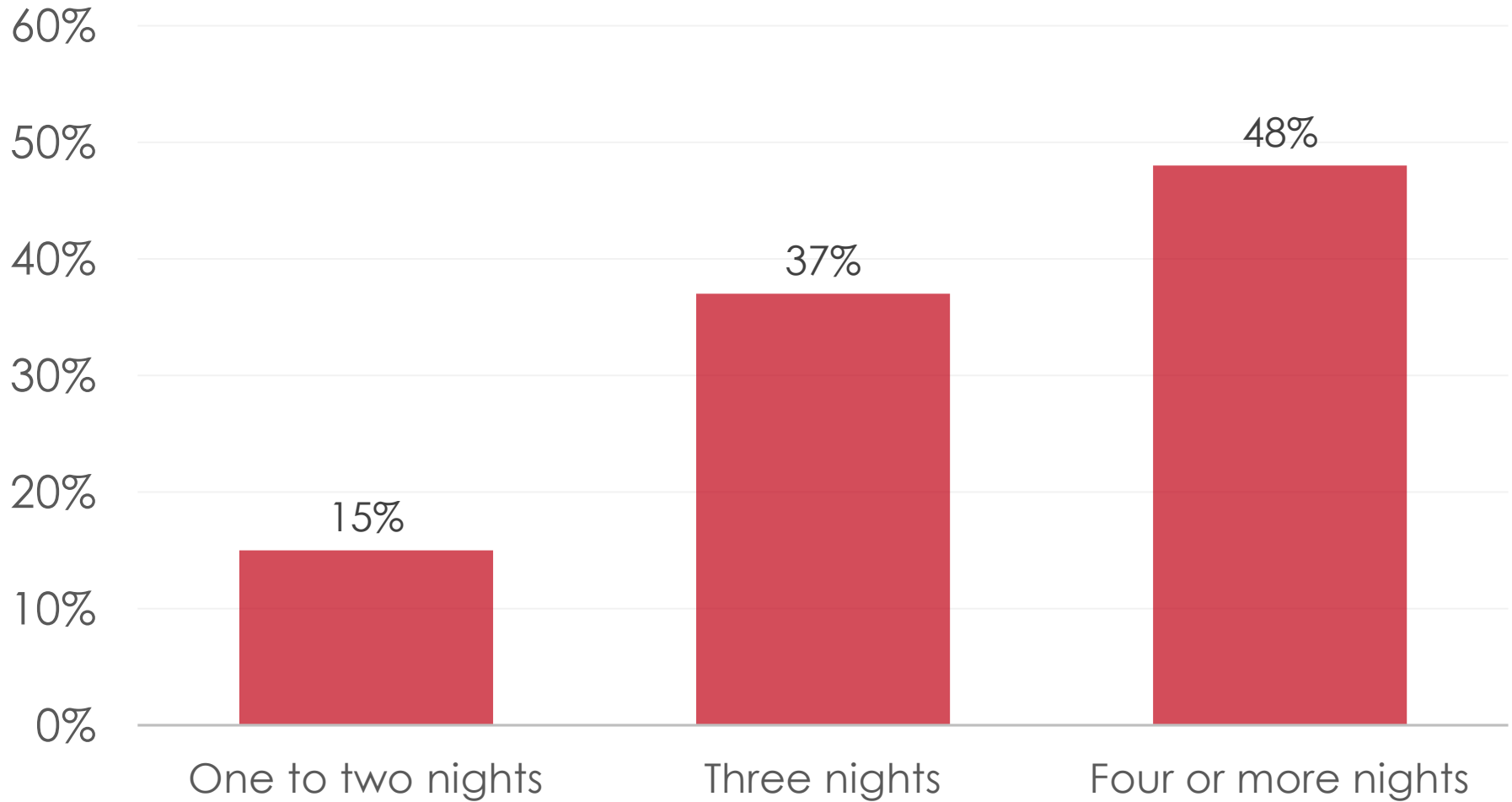
GVB EXIT SURVEY
Q3 Including this trip, how many times have you visited Guam?

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q3	1st Time	57%		64%	52%	60%
	Repeat	43%	100%	36%	48%	40%
	Total	102	1	74	84	53
Q3A	Mean	2.32	6.00	1.99	2.46	2.11
	Median	1	6	1	1	1

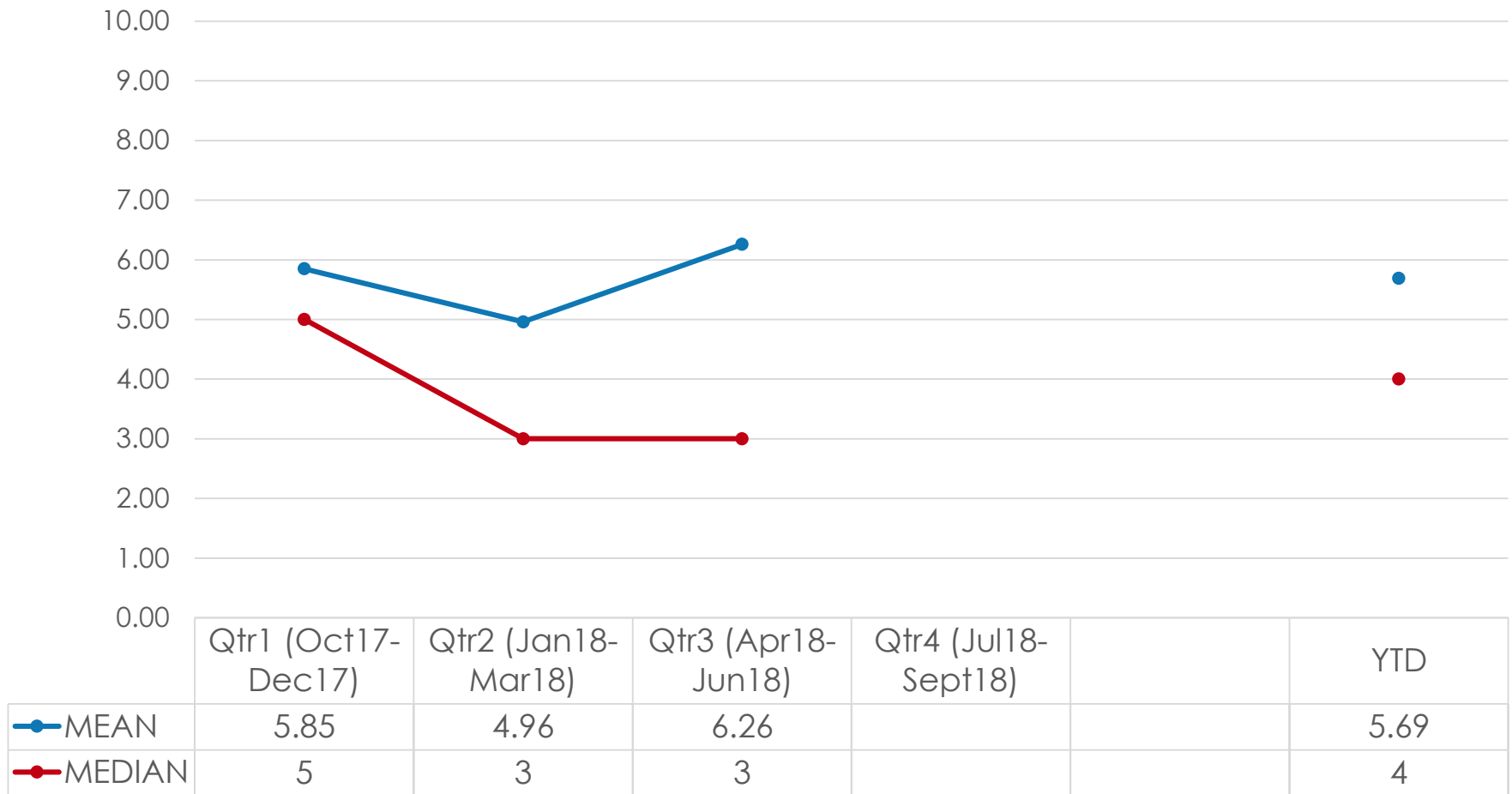
Prepared by Anthology Research

Length of Stay

MEAN NUMBER OF NIGHTS = 6.26
MEDIAN NUMBER OF NIGHTS = 3



Length of Stay – FY2018 Tracking



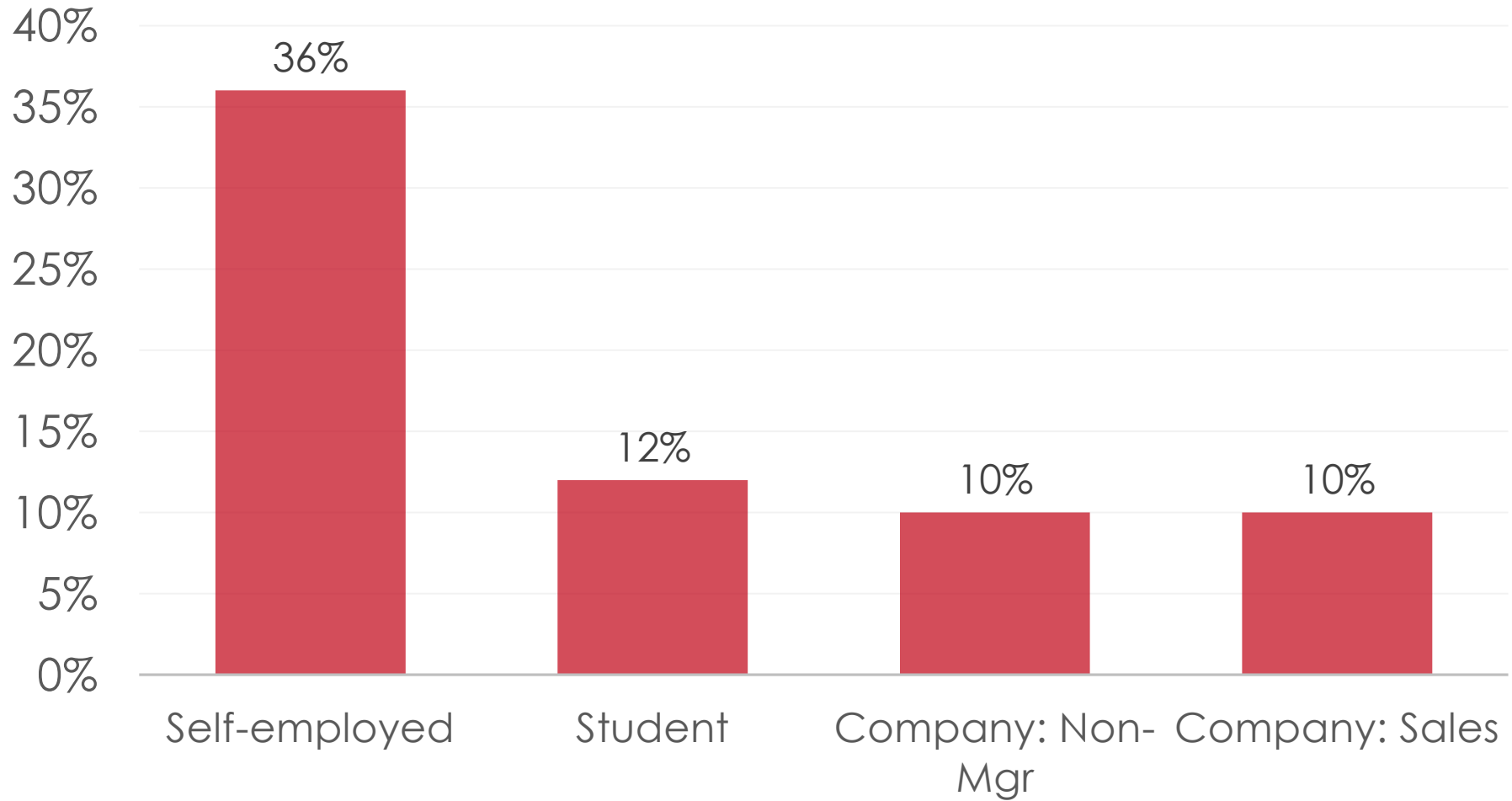
Length of Stay – Key Segments

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

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
SA	1-2	15%		18%	14%	13%
	3	37%	100%	35%	39%	32%
	4+	48%		47%	46%	55%
	Total	102	1	74	84	53
SA	Mean	6.26	3.00	6.03	6.57	4.66
	Median	3	3	3	3	4

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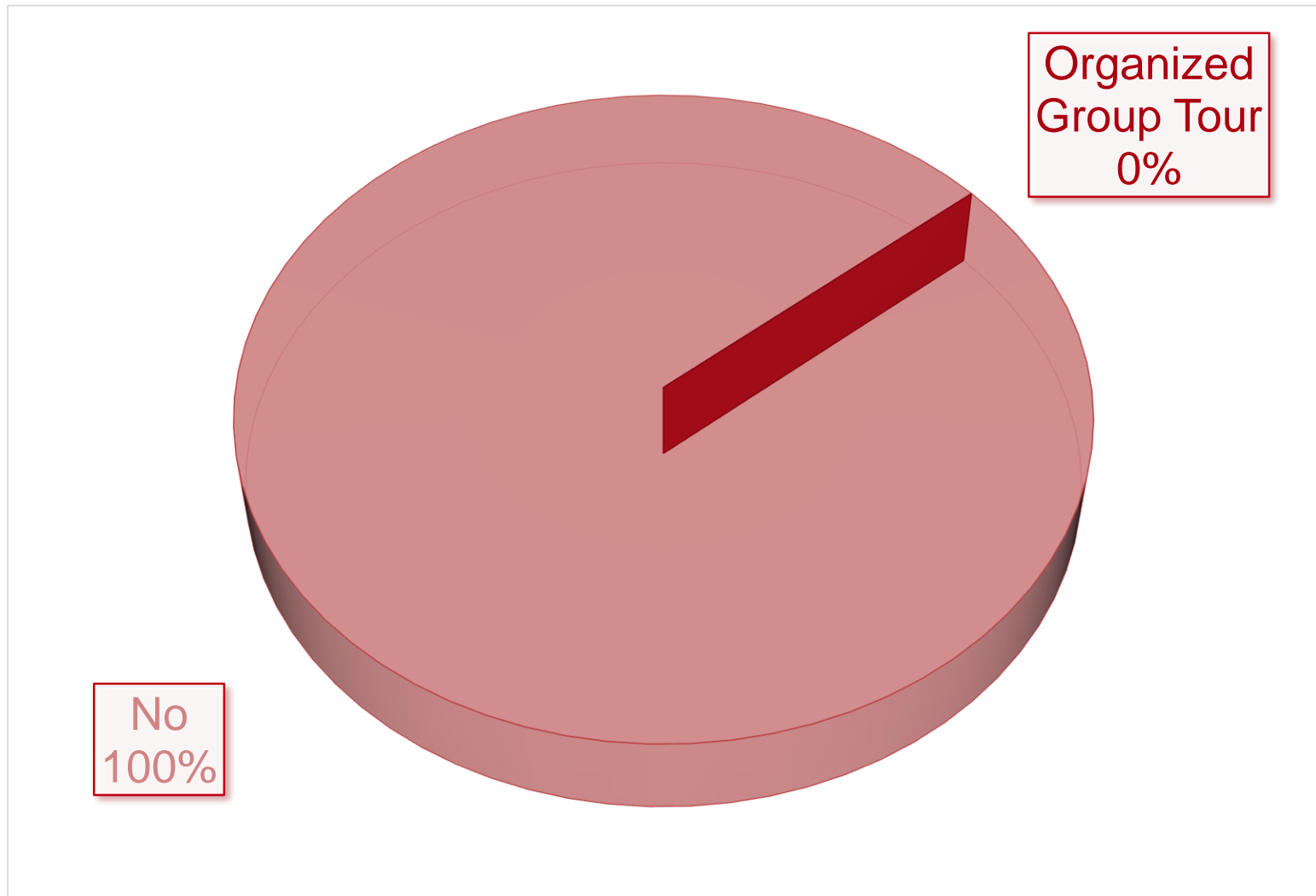
Occupation – Top Responses (10%+)



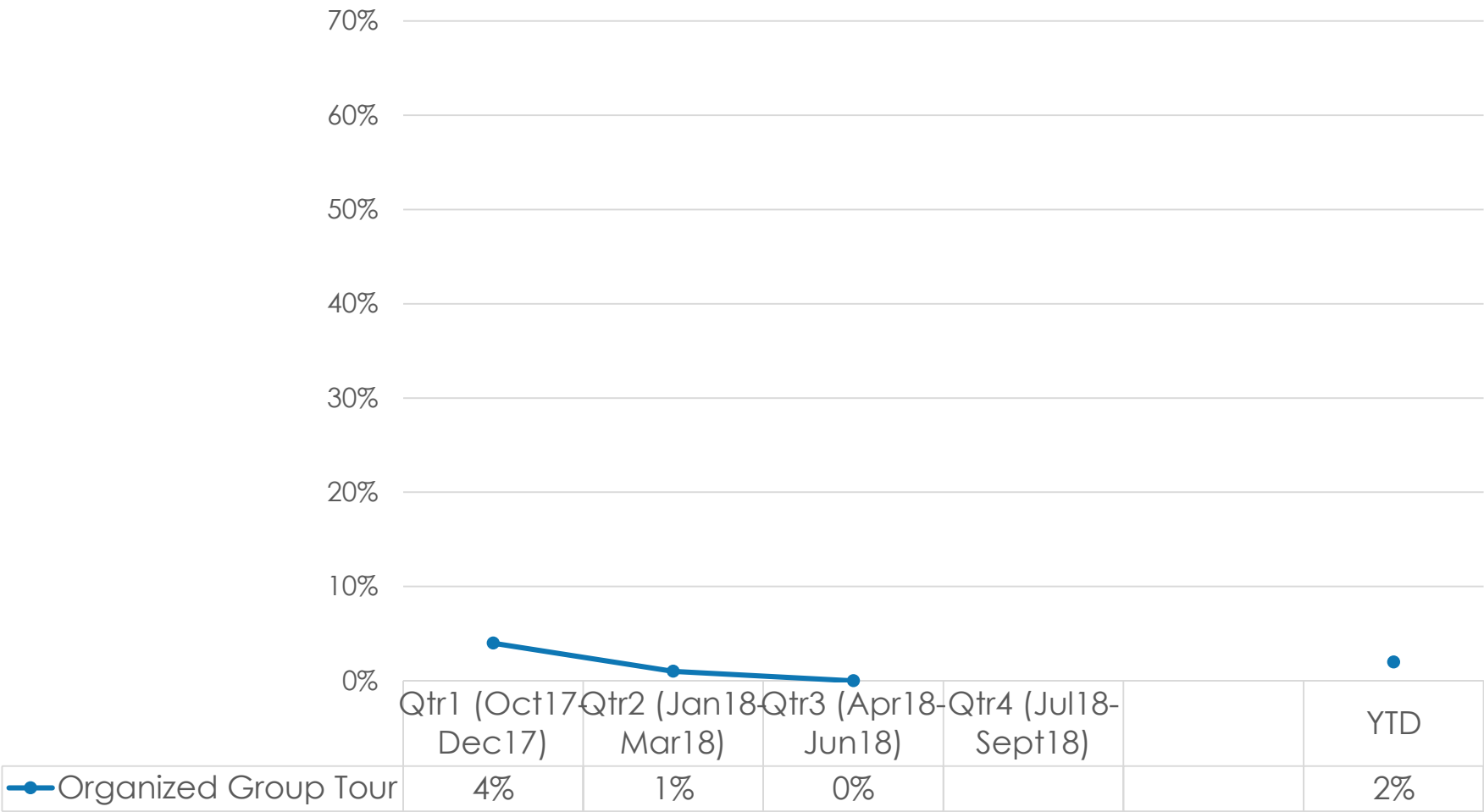
SECTION 2

TRAVEL PLANNING

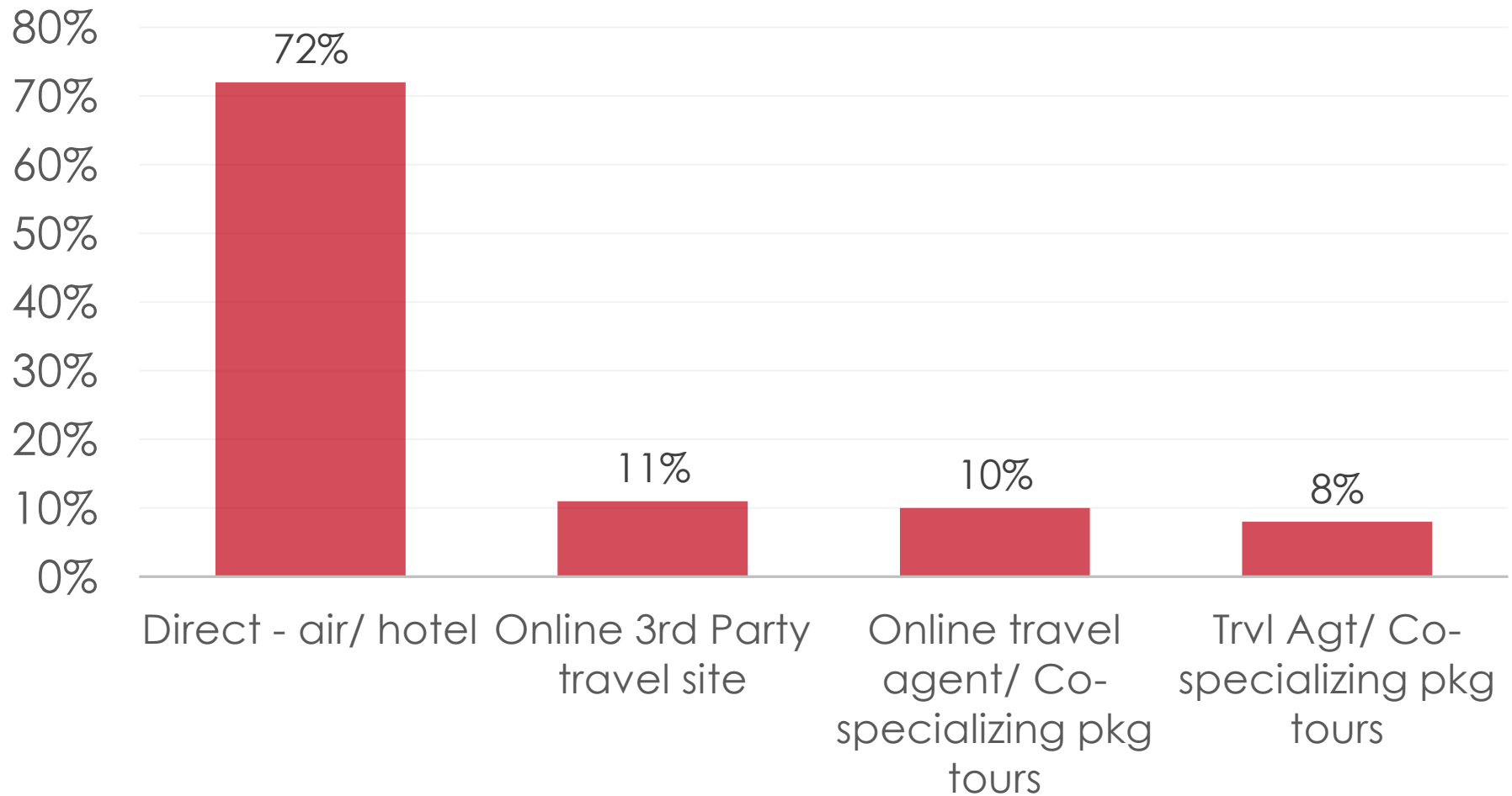
Organized Group Tour



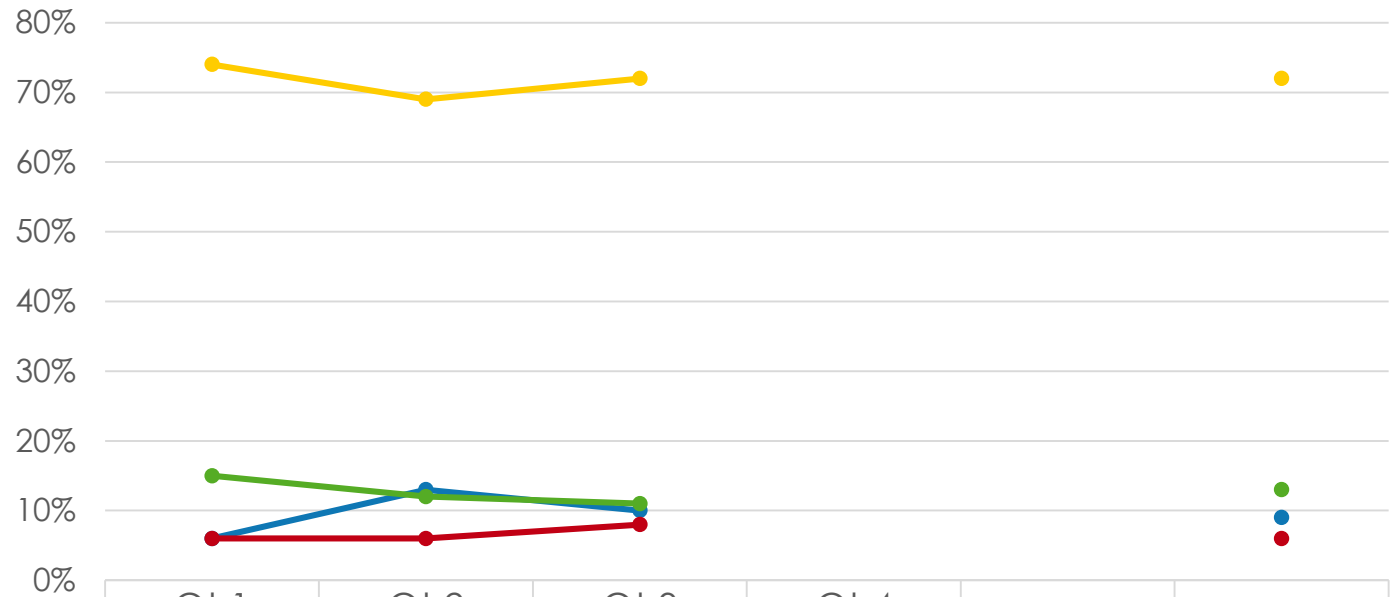
Organized Group Tour



Travel Arrangements Sources

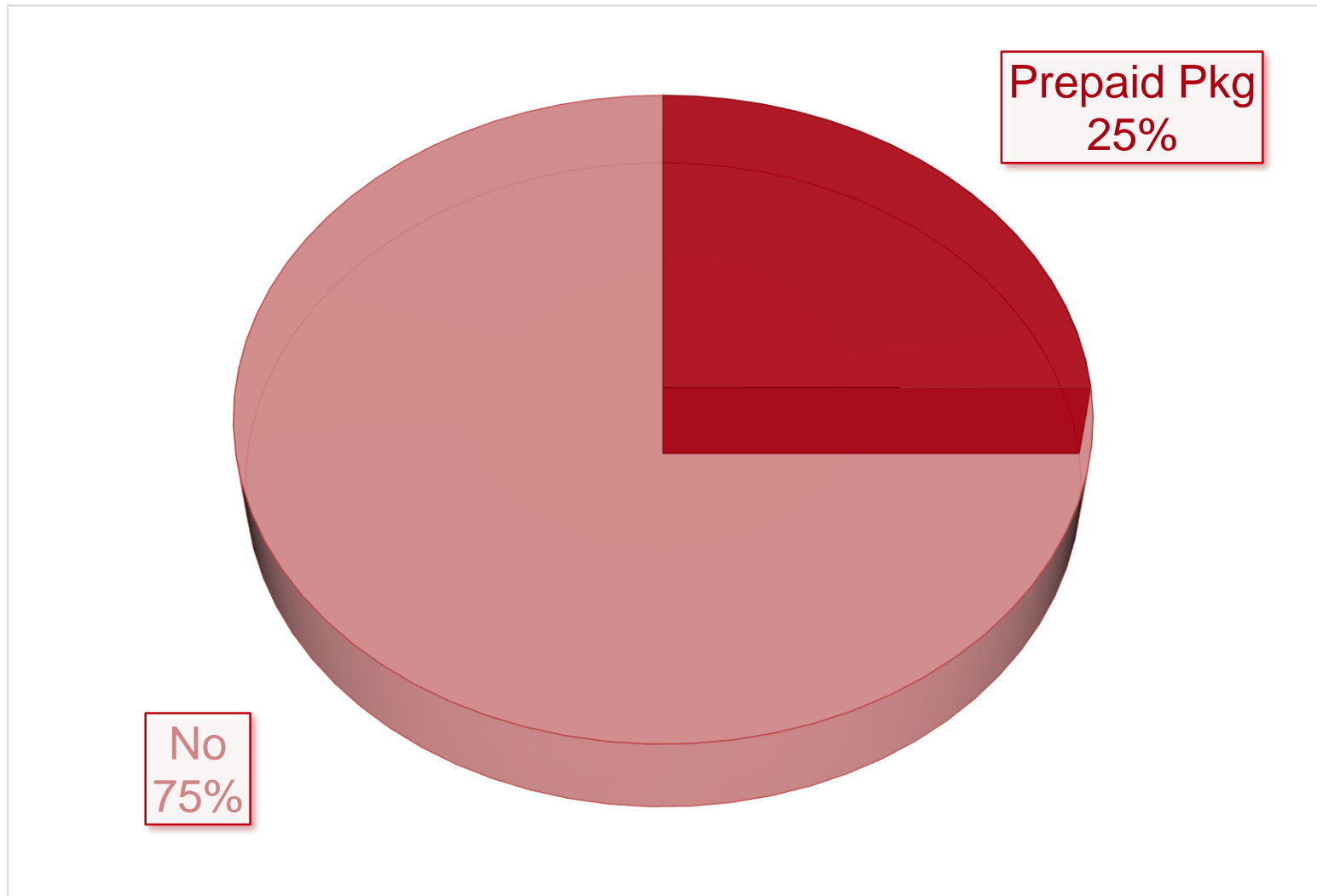


Travel Arrangements Sources

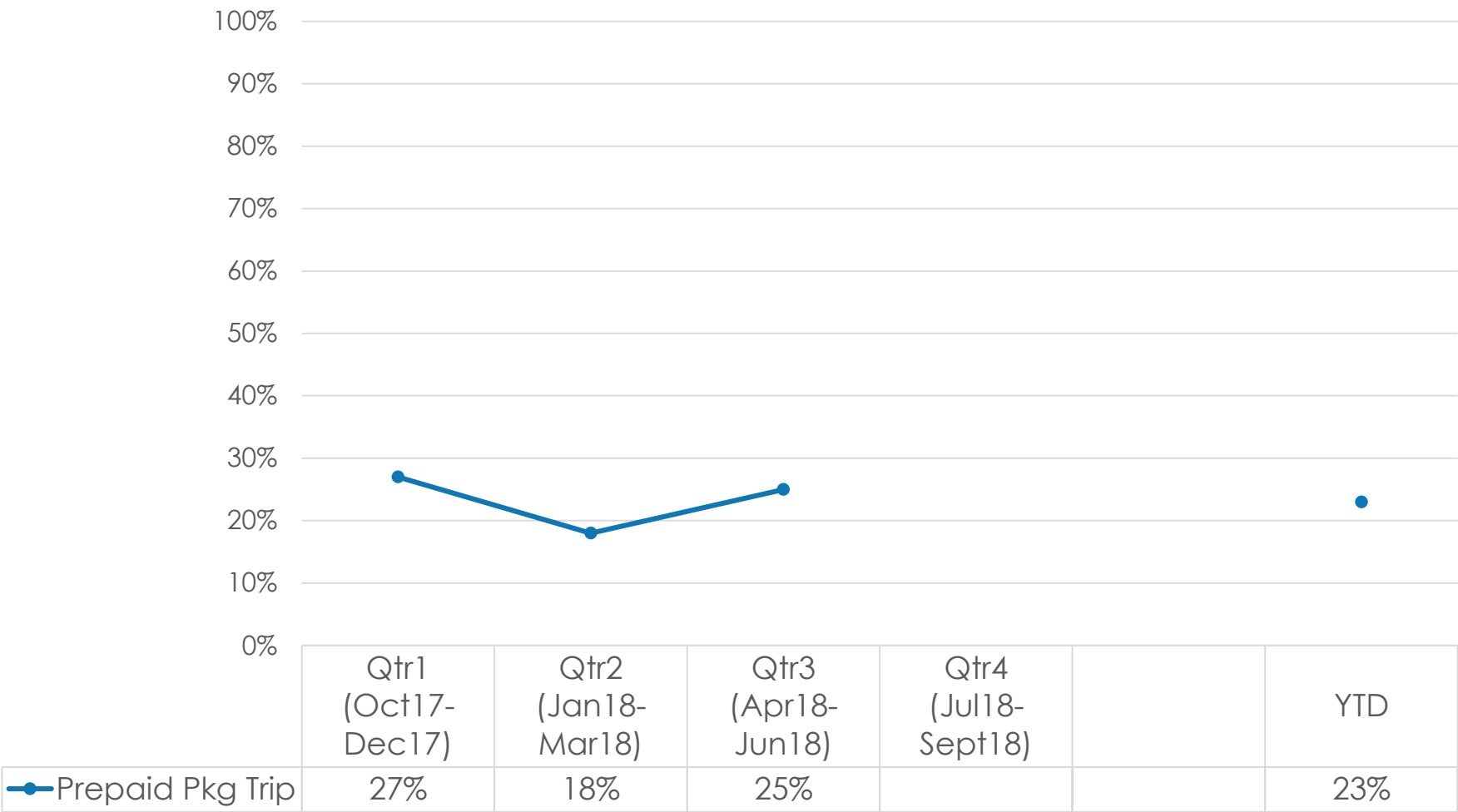


	Qtr1 (Oct17- Dec17)	Qtr2 (Jan18- Mar18)	Qtr3 (Apr18- Jun18)	Qtr4 (Jul18- Sept18)		YTD
Online travel agent	6%	13%	10%			9%
Trvl Agt/ Co- Pkg Tour	6%	6%	8%			6%
Online 3rd Party	15%	12%	11%			13%
Direct Air/ Hotel	74%	69%	72%			72%

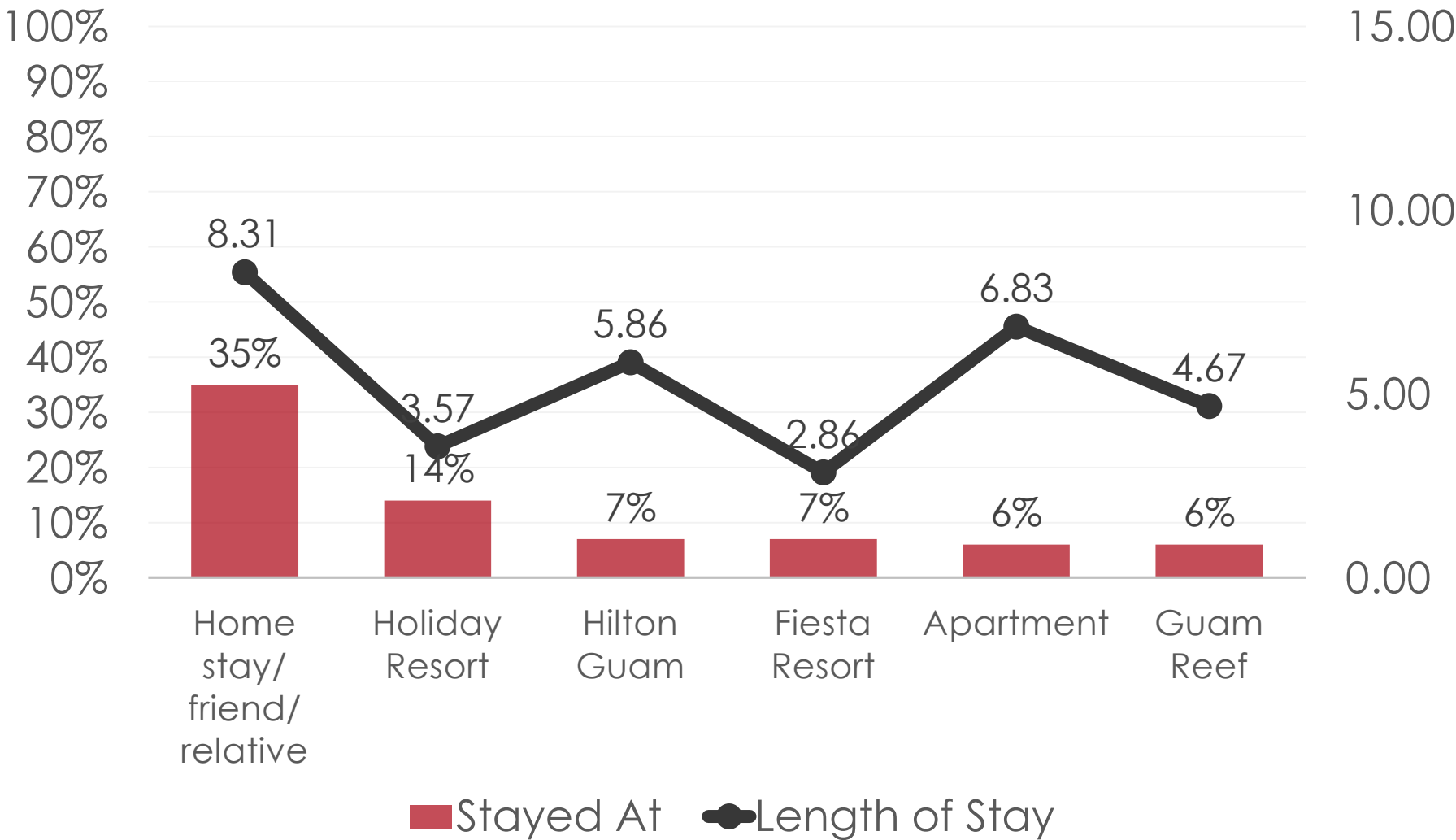
Prepaid Package Trip



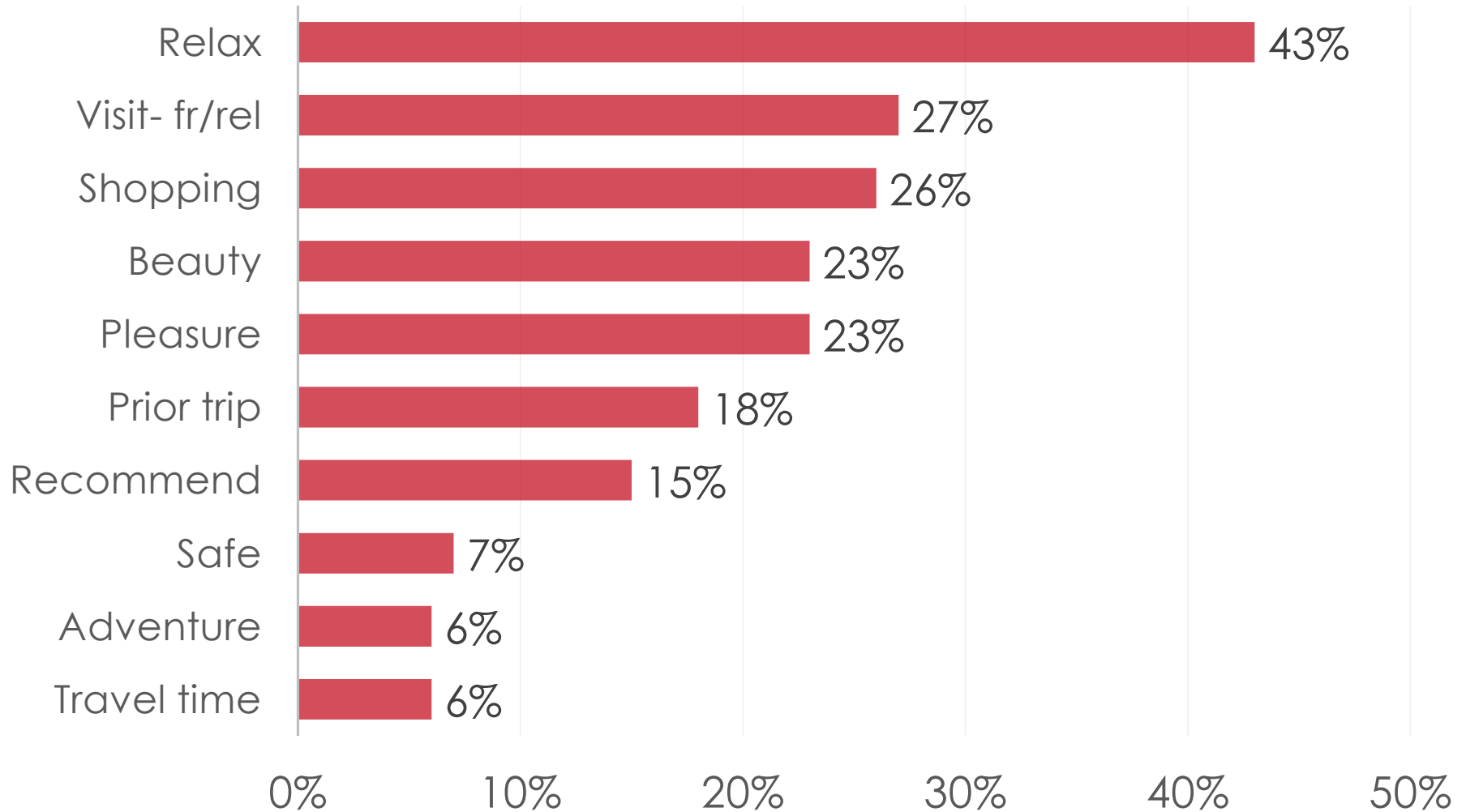
Prepaid Package Trip



Accommodations (Top Responses/ 5%+)



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 Just to relax	43%		59%	37%	40%
To visit friends or relatives	27%		26%	29%	25%
Shopping	26%	100%	28%	29%	34%
Beautiful seas, beaches, tropical climate	23%		31%	23%	26%
Pleasure/ vacation	23%	100%	31%	26%	26%
A previous visit	18%		15%	19%	25%
Recommendation of friend/ relative/ travel agency	15%		9%	17%	9%
It is a safe place to spend a vacation	7%		7%	7%	11%
Short travel time (not too far from home)	6%		4%	7%	11%
Adventure	6%		7%	7%	8%
Company/ business trip	4%		3%	5%	
Price of the tour package	3%		3%	1%	4%
Water sports (snorkeling, windsurfing, parasailing)	2%		3%	2%	2%
Scuba diving	1%		1%		
Convention/ conference/ trade show/ meeting	1%	100%	1%	1%	
Career certification/ testing	1%			1%	
Government or military	1%			1%	2%
Total	102	1	74	84	53

Prepared by Anthology Research

SECTION 3

EXPENDITURES

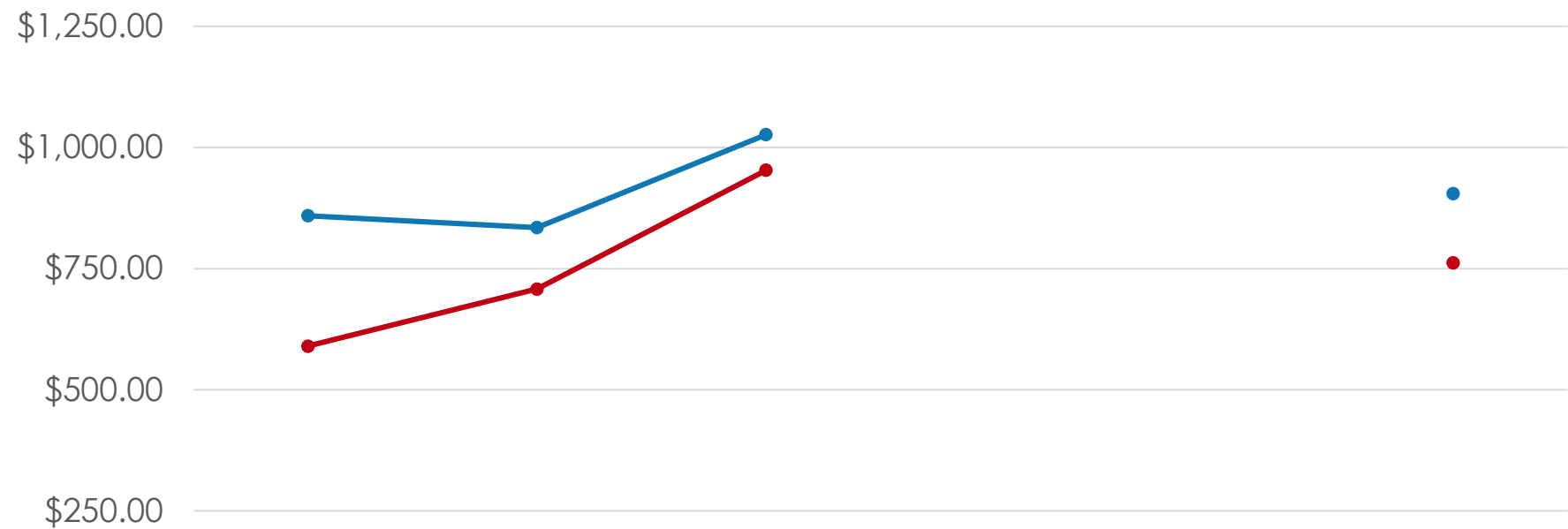
Prepaid Expenditures

EXCHANGE RATE Peso 52.48=\$1

- \$1,026.65 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$633.35 = overall mean average per person prepaid expenditures

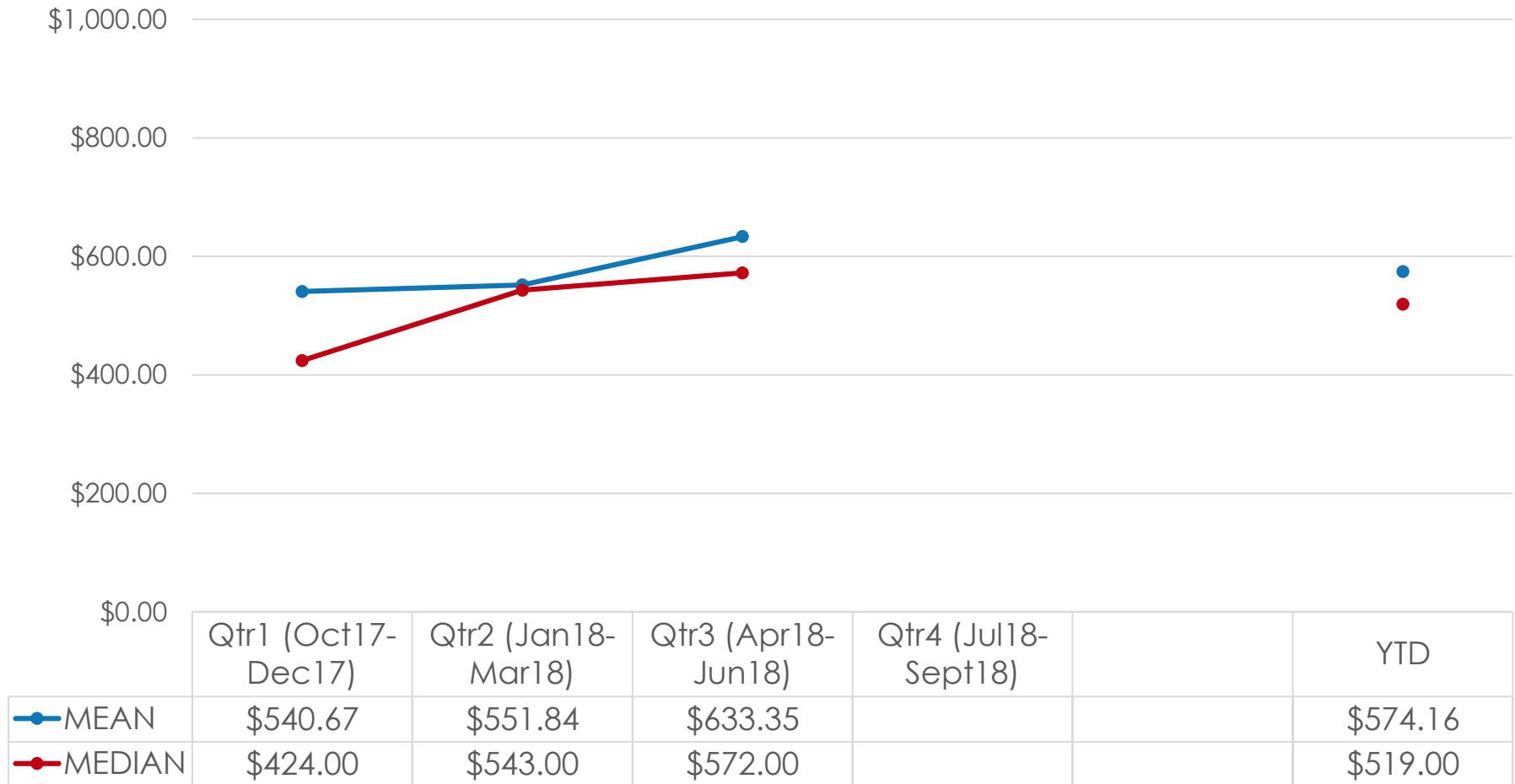
Prepaid Entire Travel Party – FY2018

Tracking



	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sept18)		YTD
MEAN	\$859.07	\$834.76	\$1,026.65			\$904.64
MEDIAN	\$590.00	\$708.00	\$953.00			\$762.00

Prepaid Per Person– FY2018 Tracking



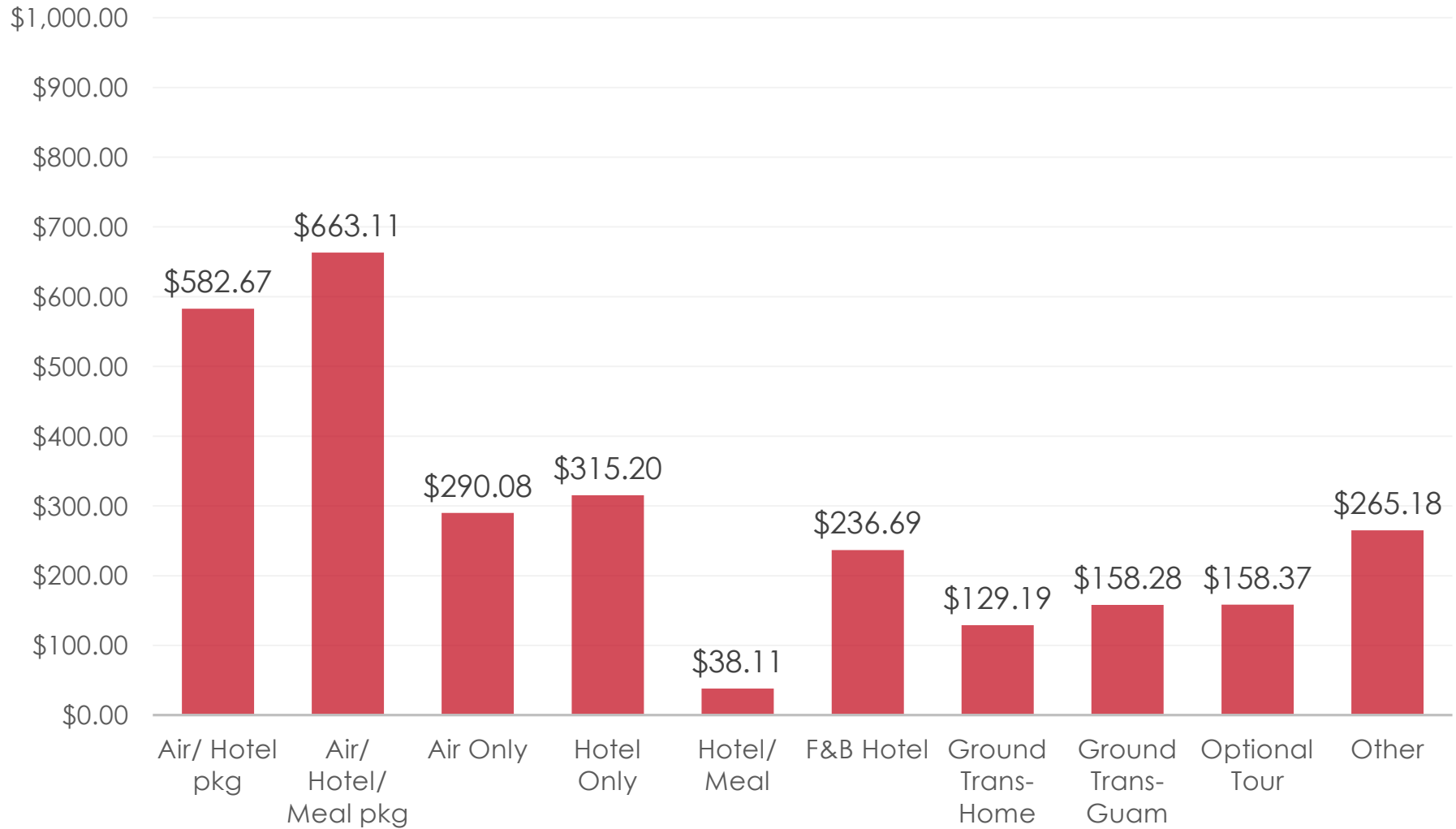
Prepaid Per Person– Key Segments

GVB EXIT SURVEY
Q10A PREPAID - PER PERSON:

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
PREPAID PP	Mean	\$633.35	\$381.10	\$618.27	\$618.96	\$488.08
	Median	\$572	\$381	\$572	\$572	\$495

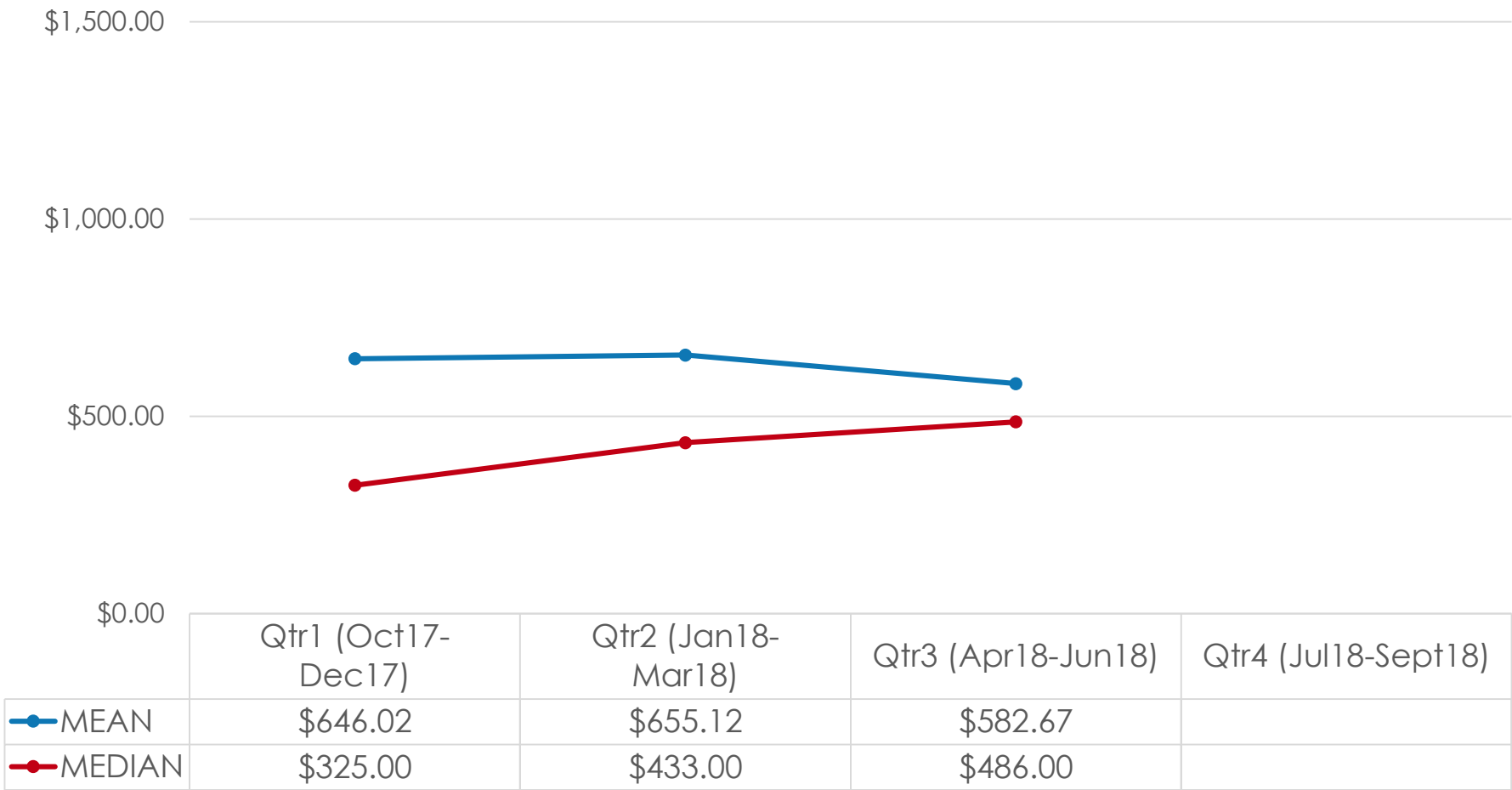
Prepared by Anthology Research

Prepaid Expenses by Category – MEAN Entire Travel Party



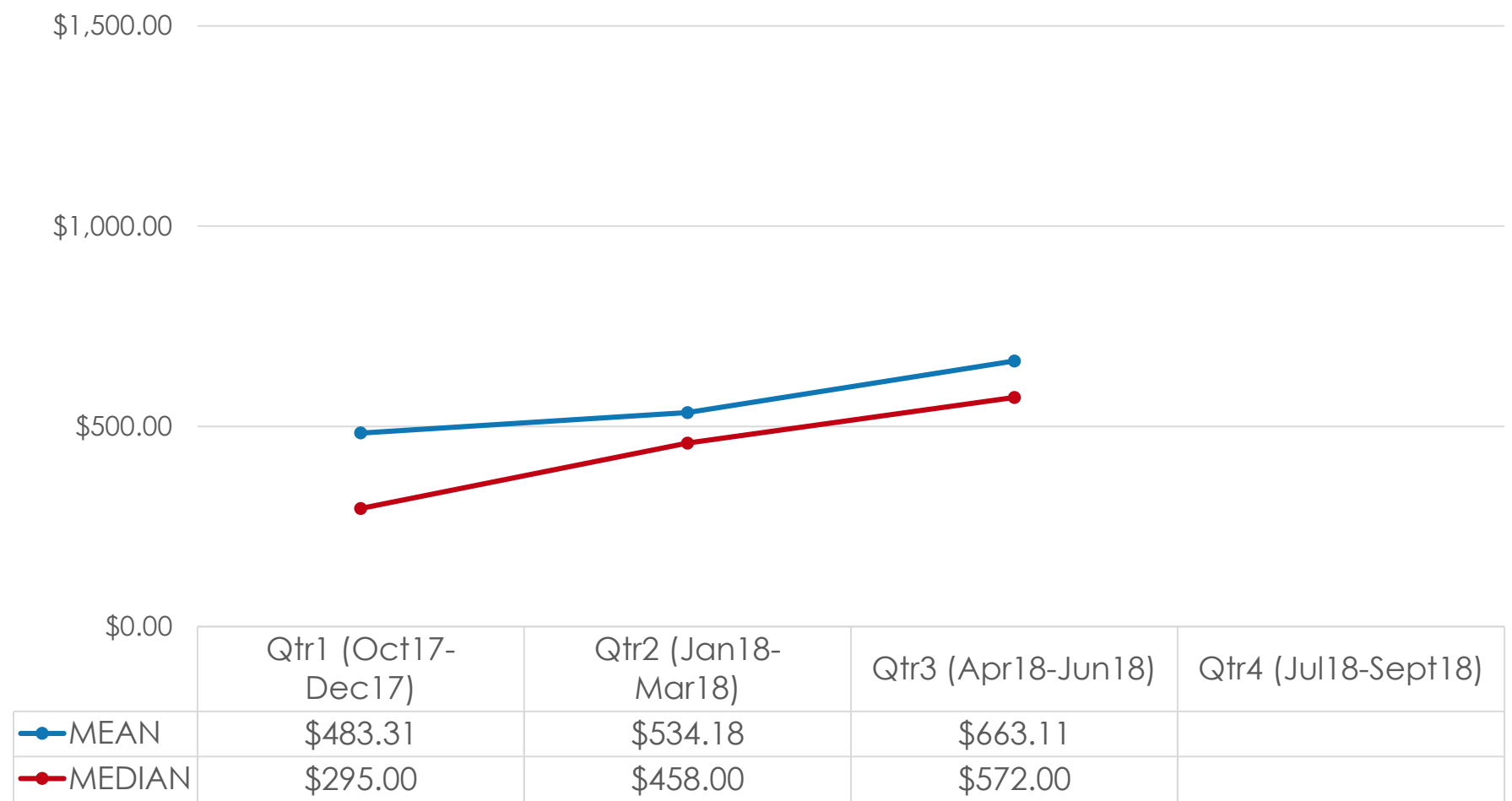
Prepaid– FY2018 Tracking

Airfare & Accommodation Packages



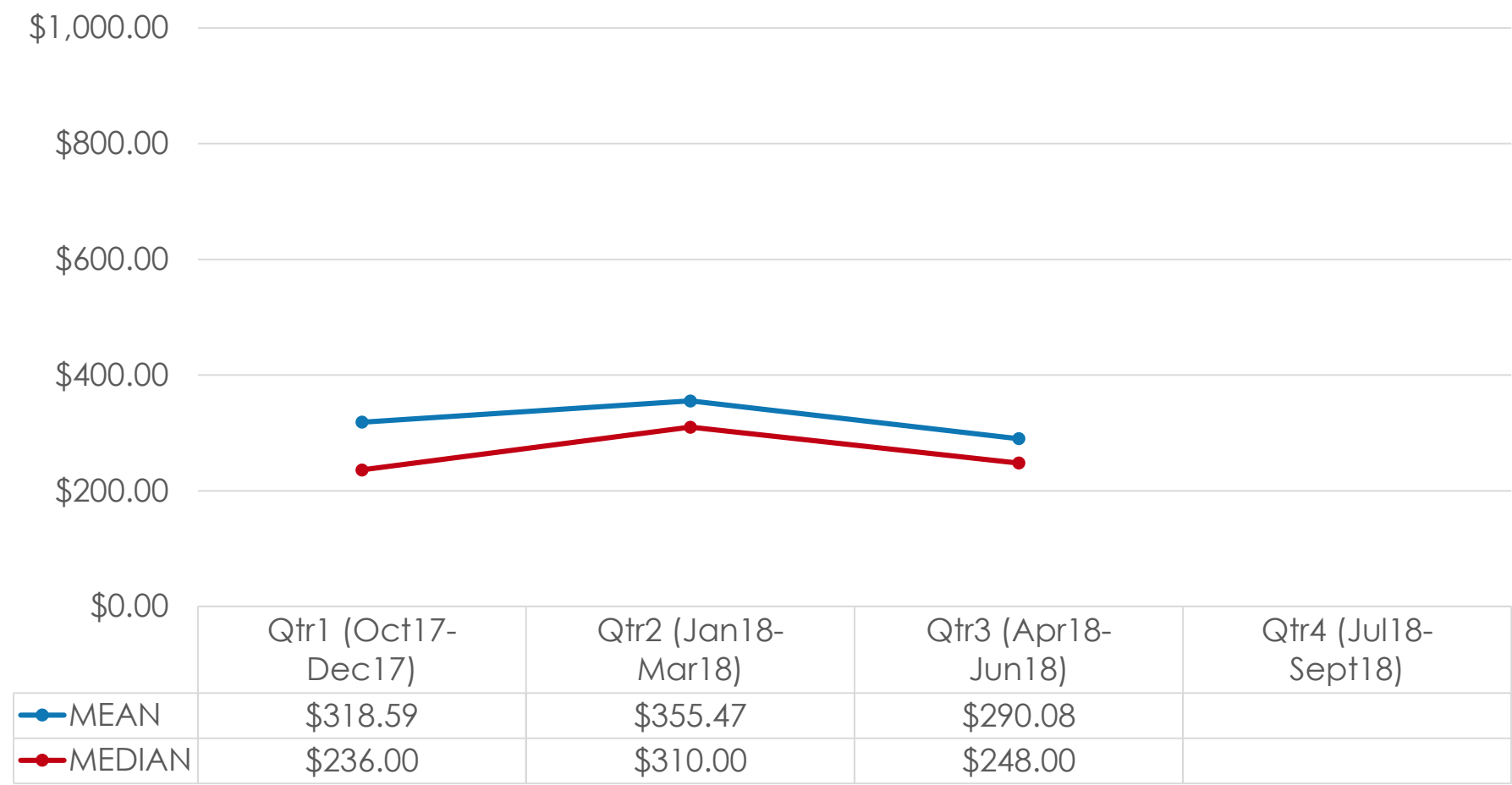
Prepaid– FY2018 Tracking

Airfare & Accommodation W/ Meal Packages

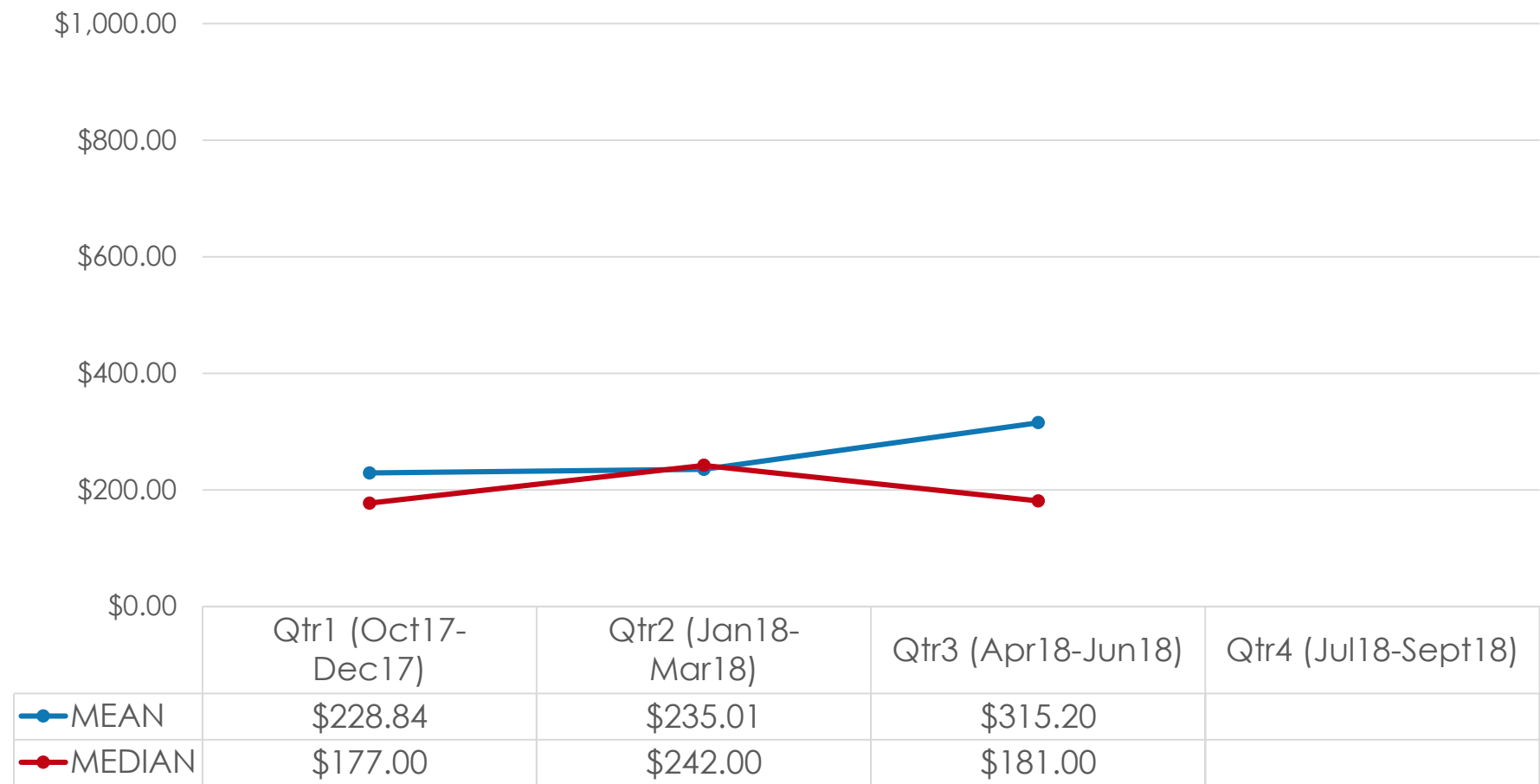


Prepaid– FY2018 Tracking

Airfare Only

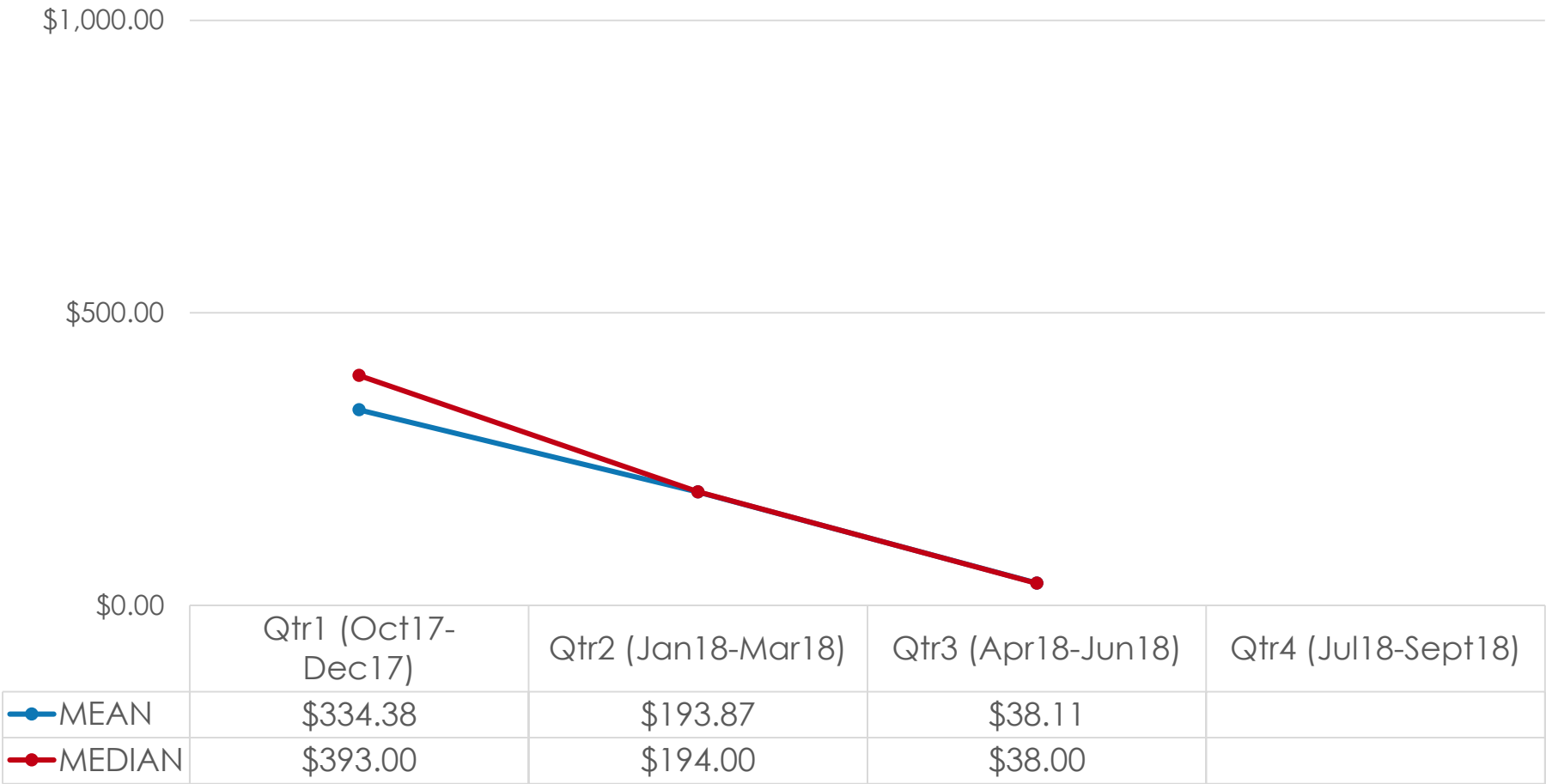


Prepaid– FY2018 Tracking Accommodations Only



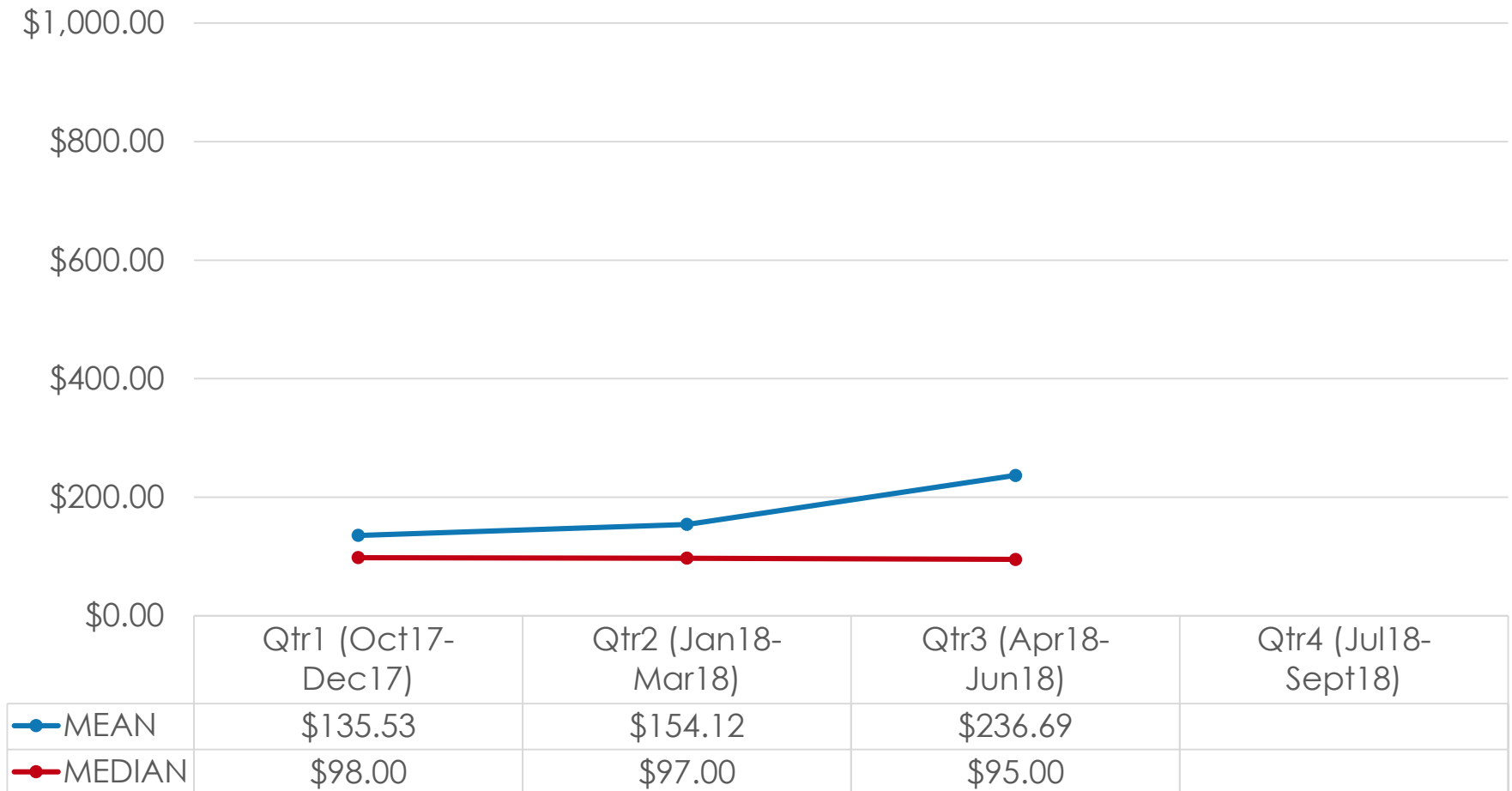
Prepaid– FY2018 Tracking

Accommodations w/ Meal Only



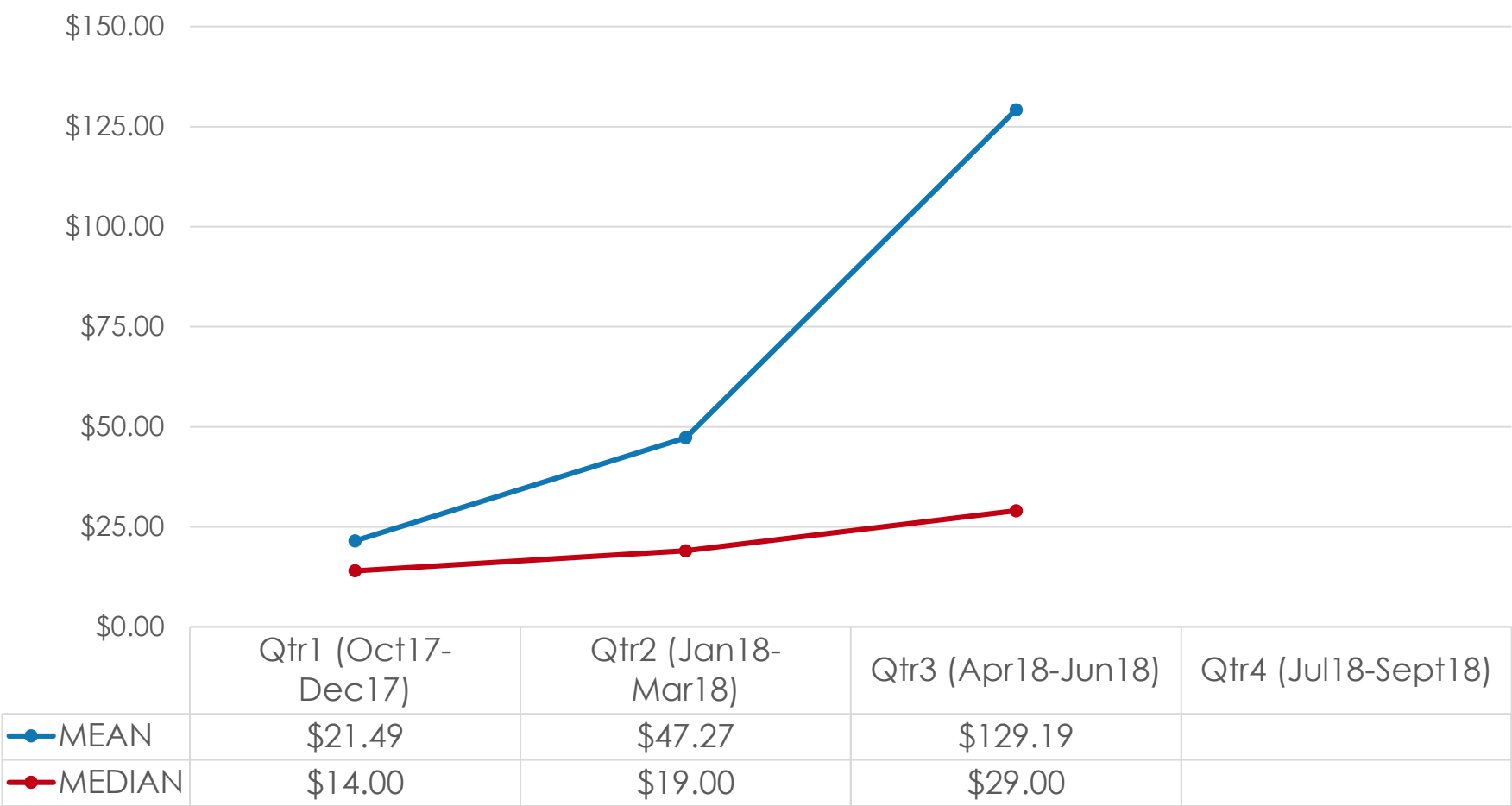
Prepaid– FY2018 Tracking

Food & Beverage in Hotel



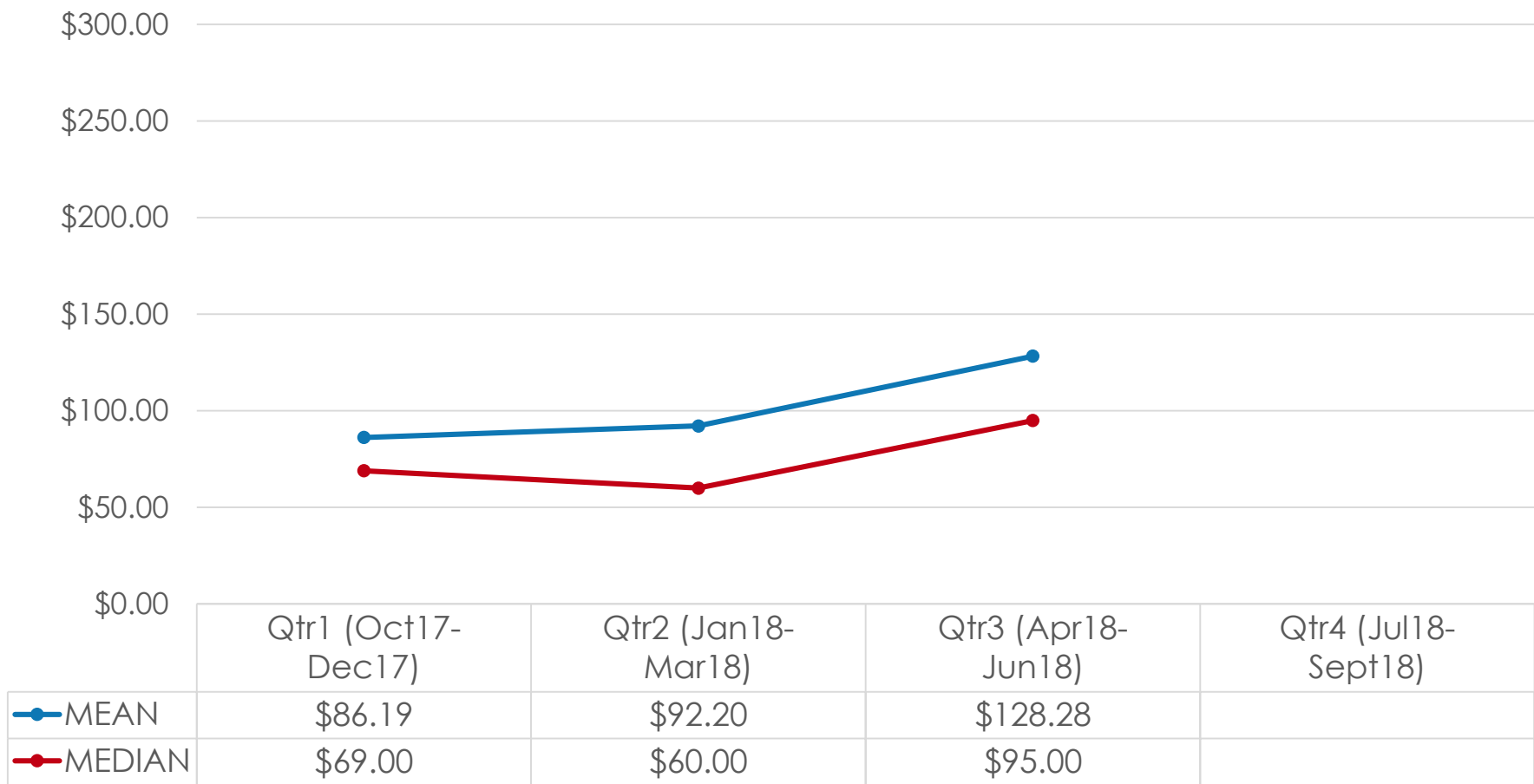
Prepaid– FY2018 Tracking

Ground Transportation - Philippines



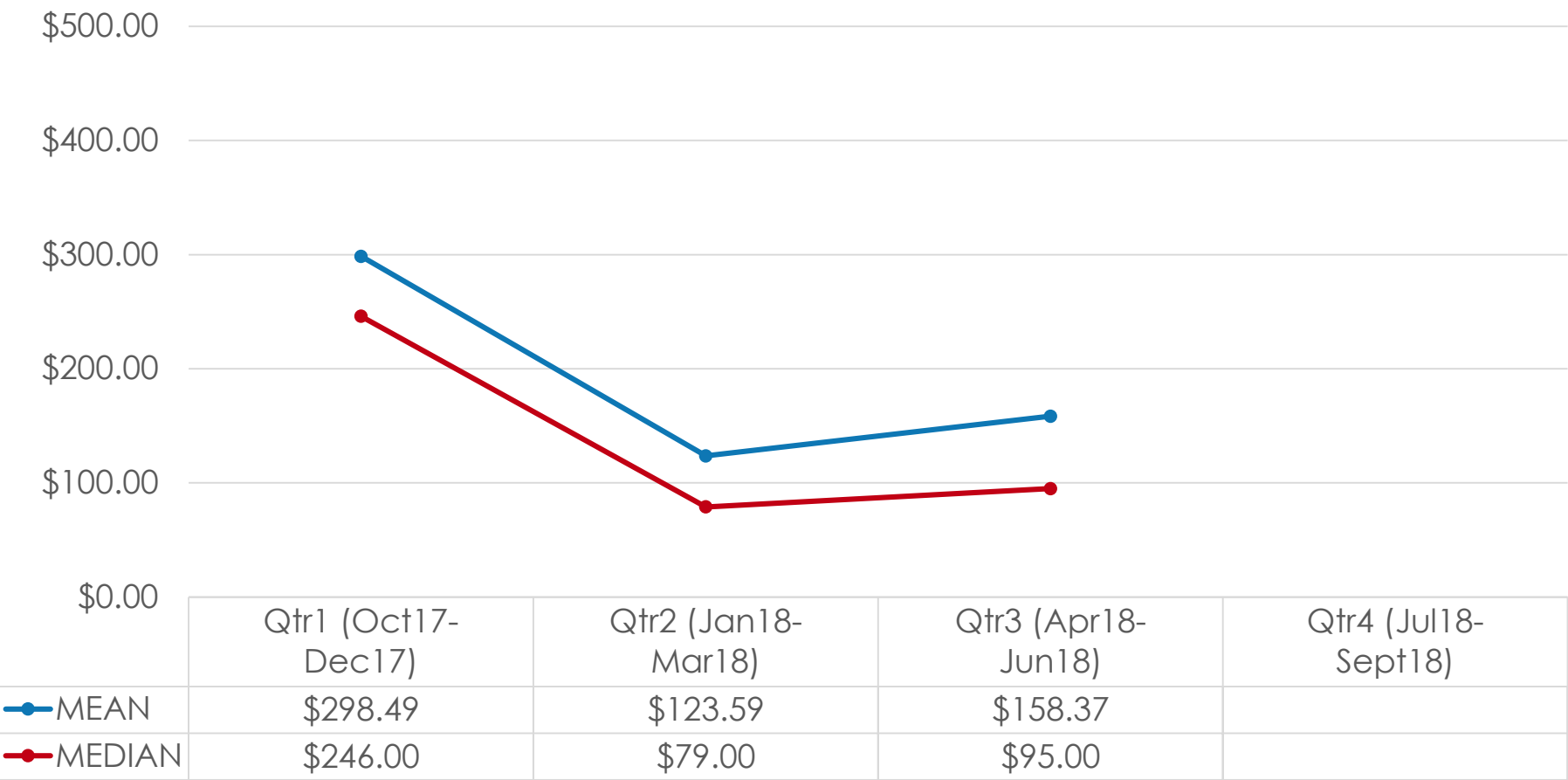
Prepaid– FY2018 Tracking

Ground Transportation - Guam



Prepaid– FY2018 Tracking

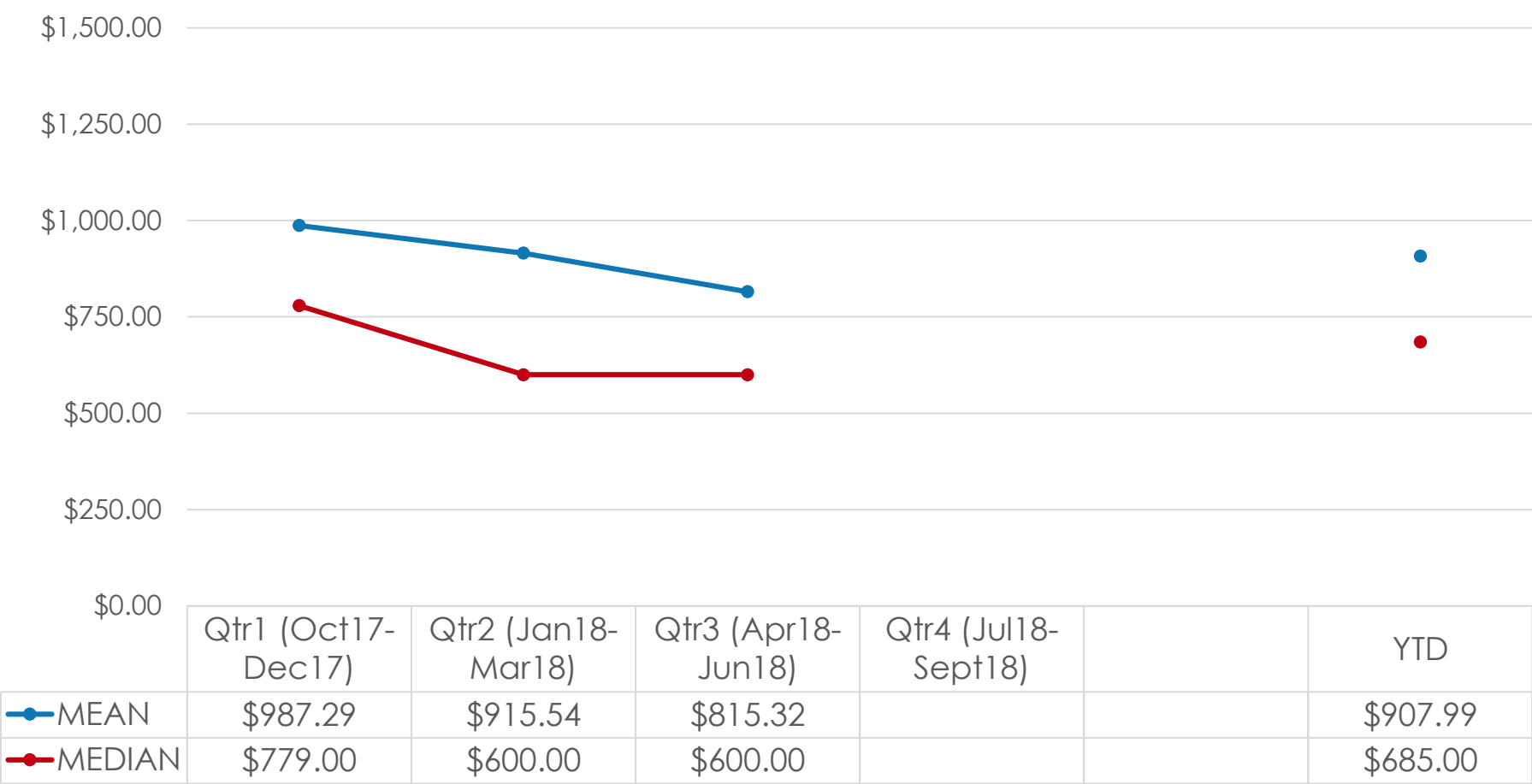
Optional tours/ Activities



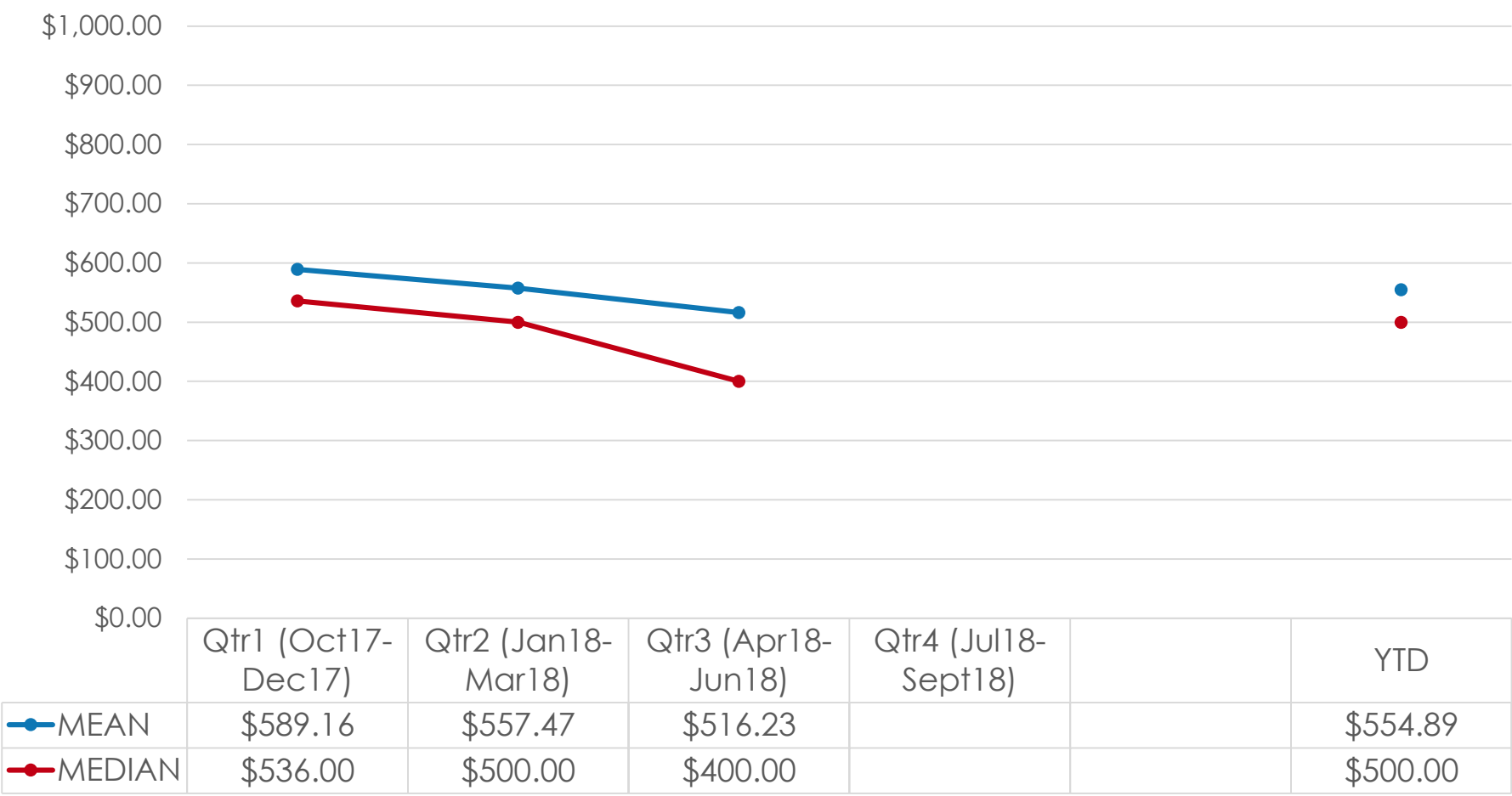
On-Island Expenditures

- \$815.32 = overall mean average on-island expense (for entire travel party size) by respondent
- \$516.23 = overall mean average per person on-island expenditures

On-Island Entire Travel Party – FY2018 Tracking



On-Island Per Person – FY2018 Tracking



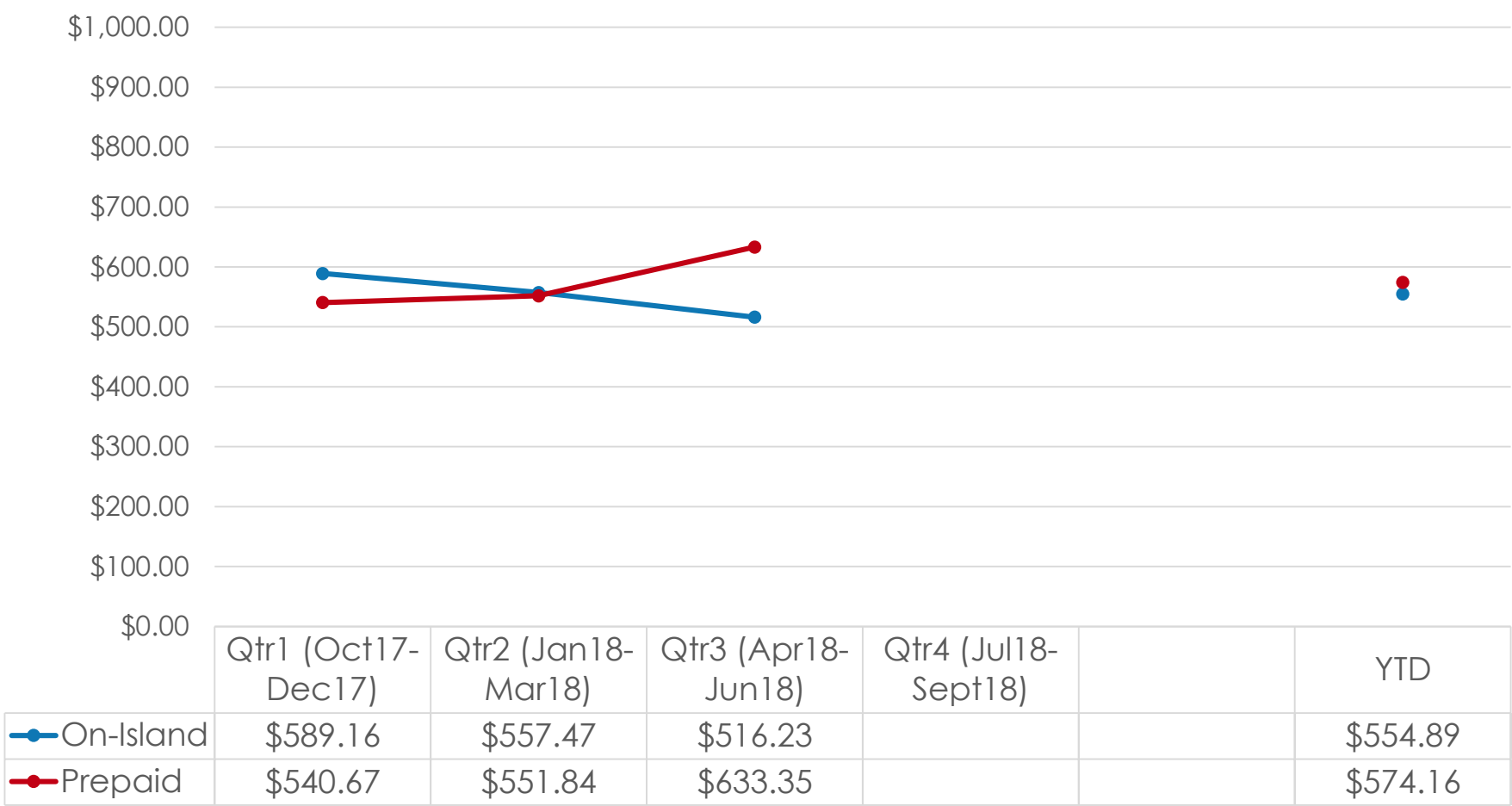
On-Island Per Person – Key Segments

GVB EXIT SURVEY
Q11A ONISLE EXPENDITURE- PER PERSO

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
ONISLE PP	Mean	\$516.23	\$220.00	\$521.28	\$477.37	\$439.92
	Median	\$400	\$220	\$400	\$400	\$333

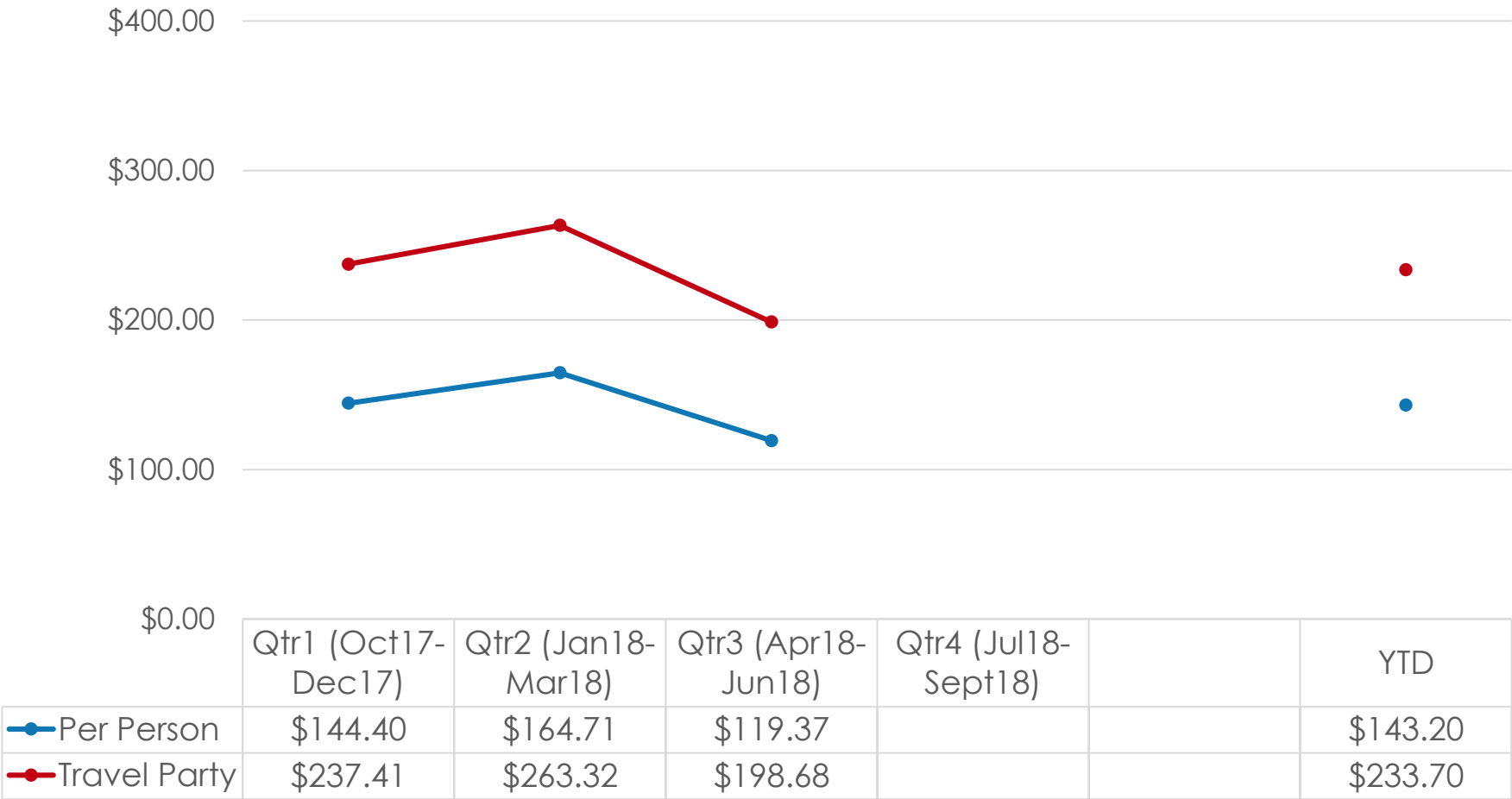
Prepared by Anthology Research

Per Person MEAN expenditures – FY2018 Tracking On-Island/ Prepaid

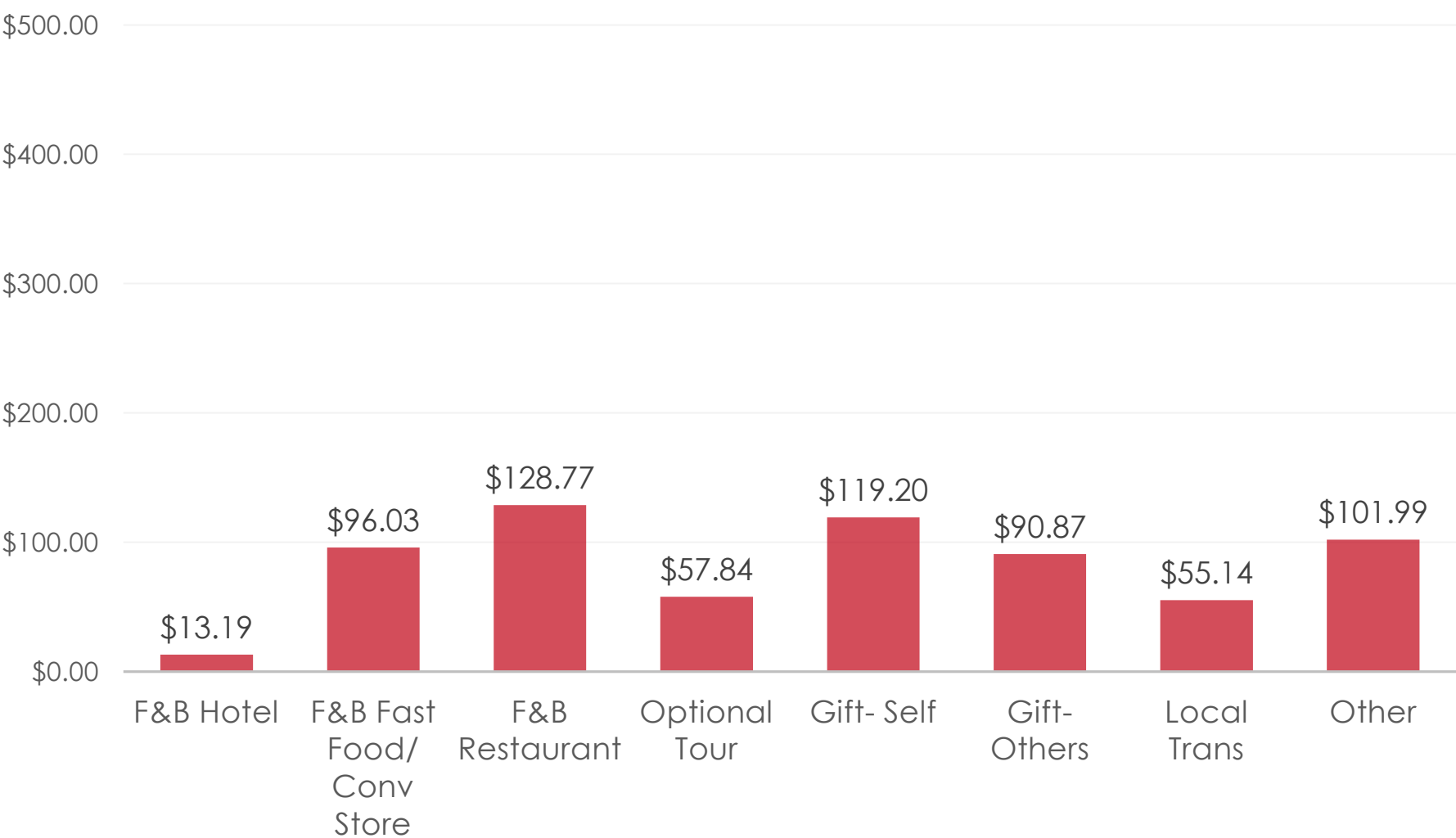


On-Island Per Day Spending – FY2018 Tracking

MEAN

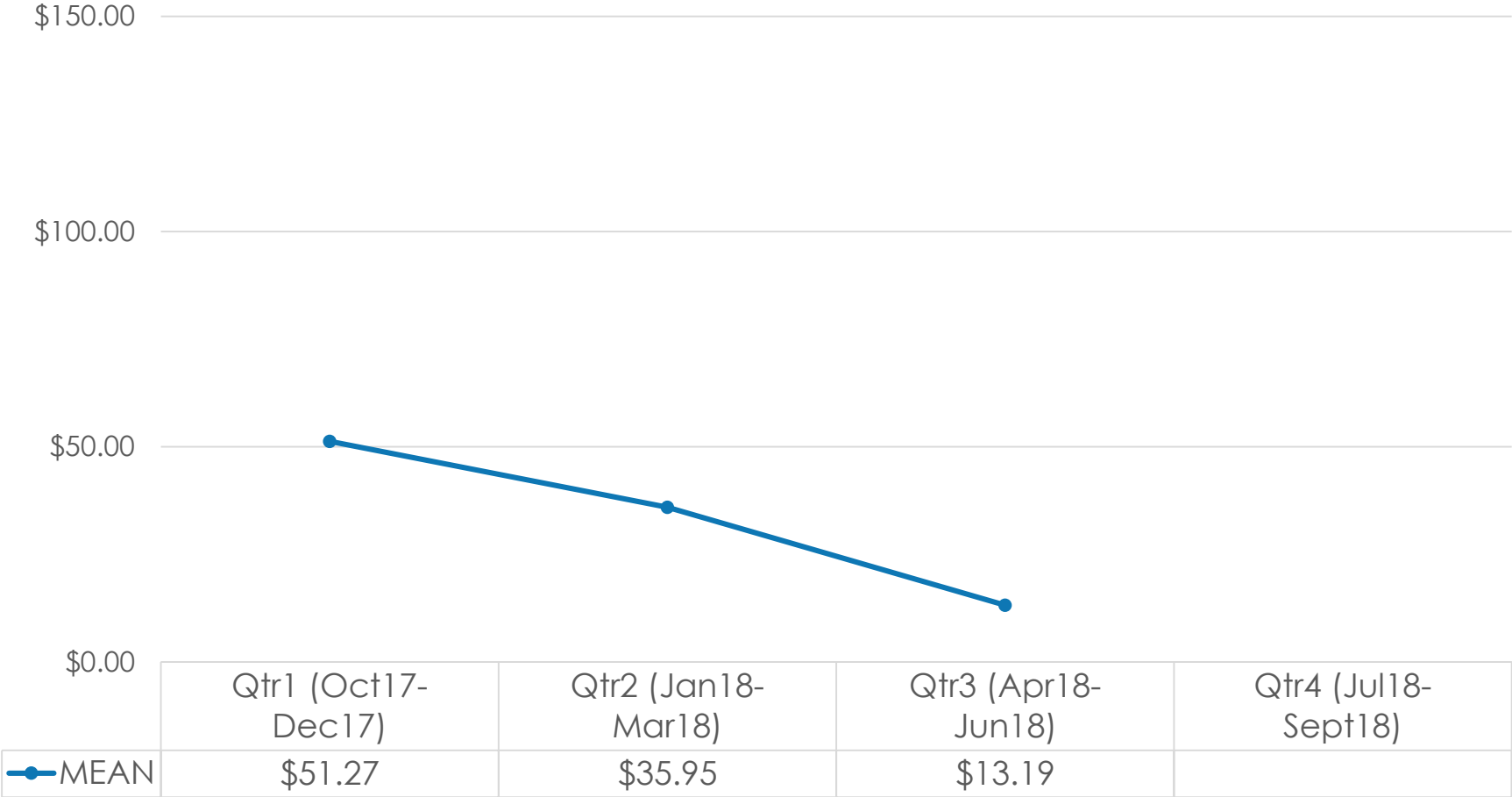


On-Island Expenses by Category – MEAN Entire Travel Party



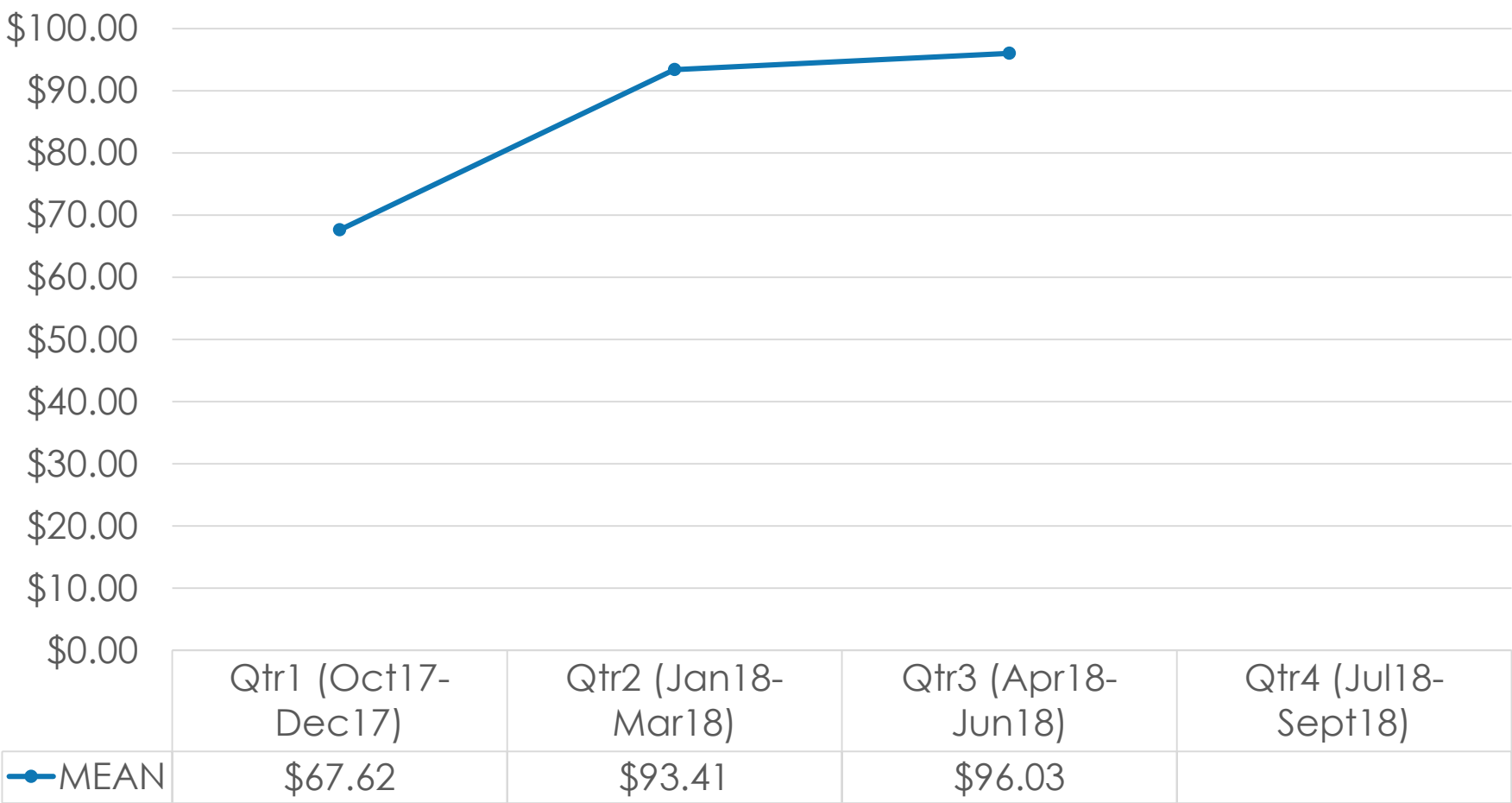
On-Island – FY2018 Tracking

Food & Beverage - Hotel



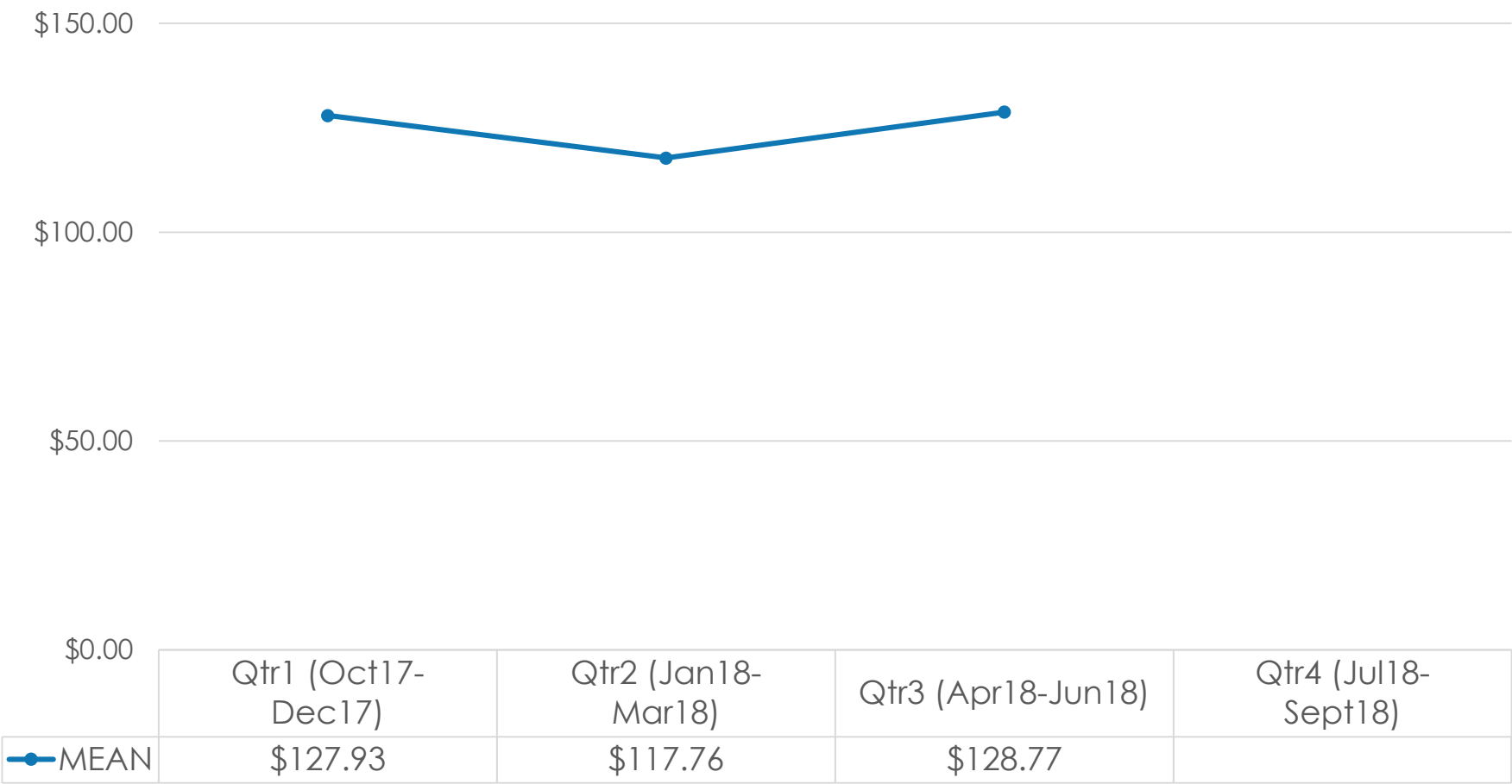
On-Island – FY2018 Tracking

Food & Beverage – Fast Food/ Convenience Store



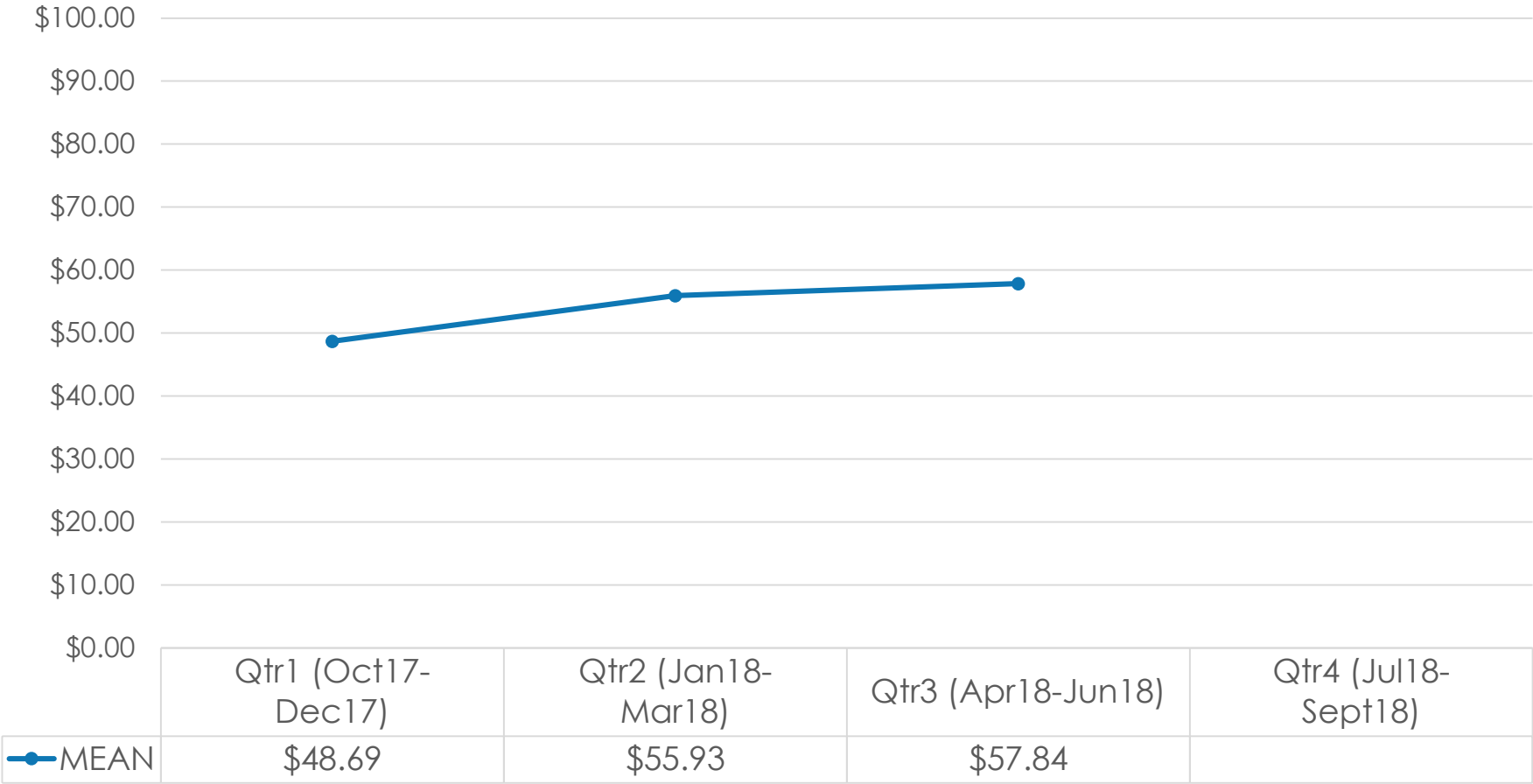
On-Island – FY2018 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



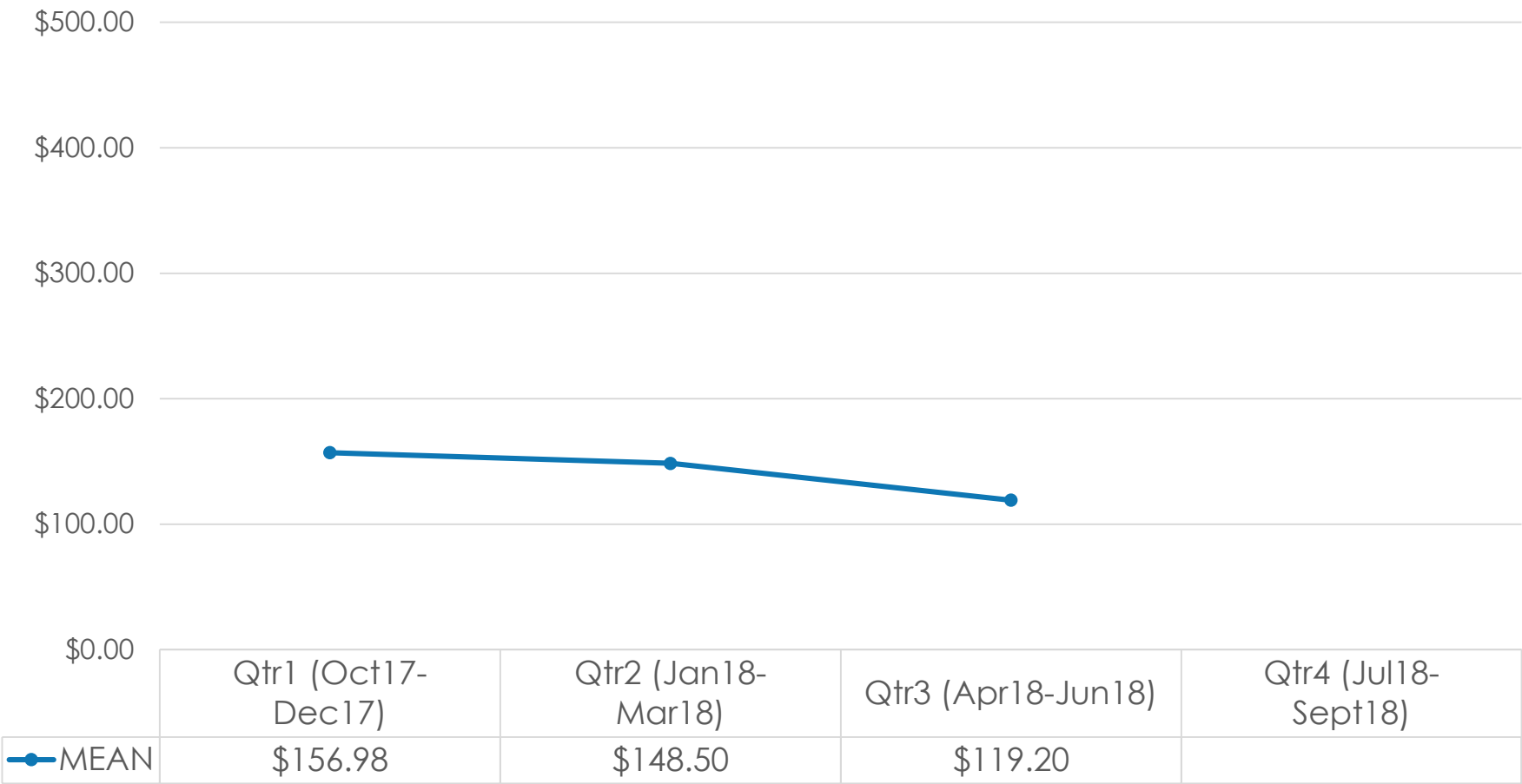
On-Island – FY2018 Tracking

Optional tour/ Activities



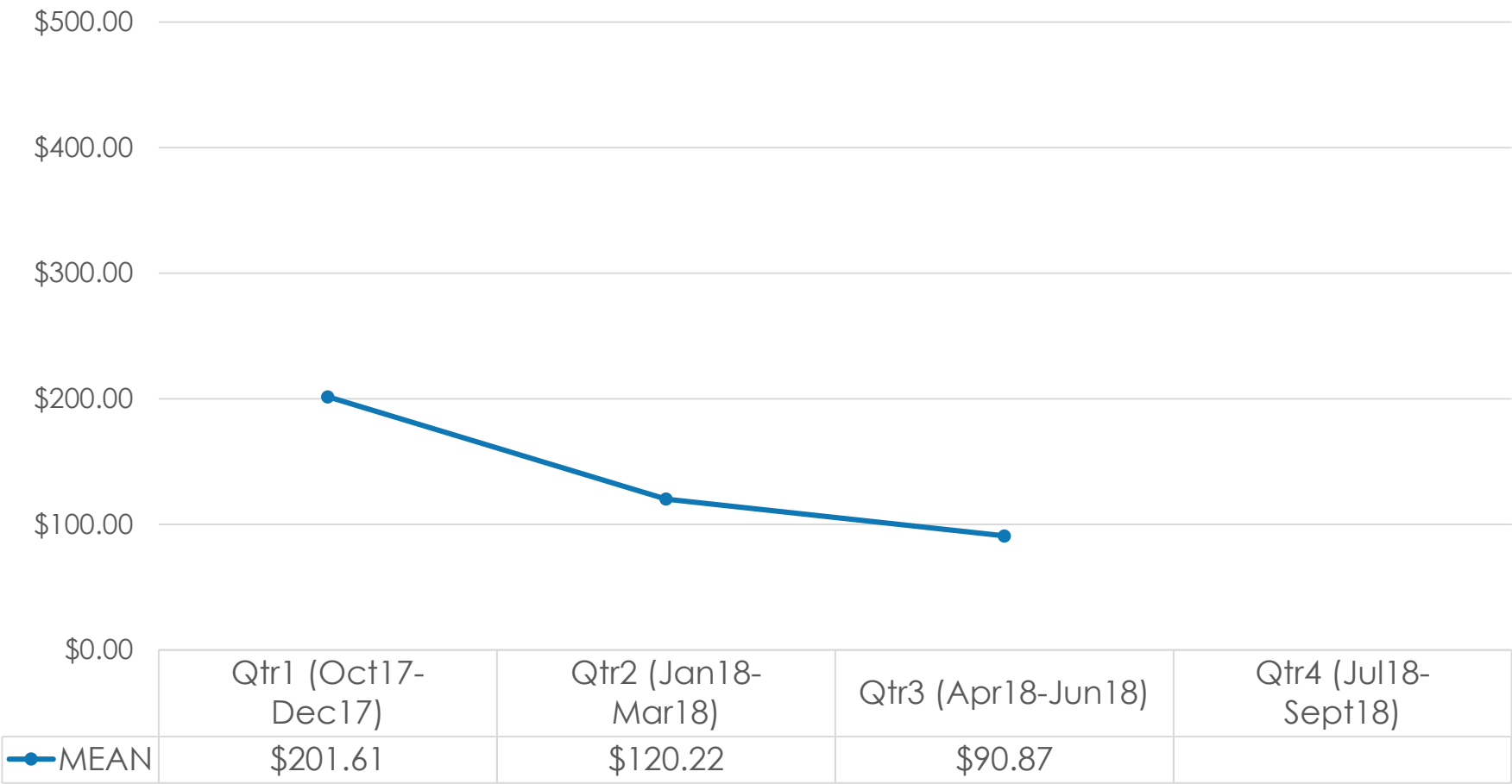
On-Island – FY2018 Tracking

Gift/ Souvenir – Self/ Companion



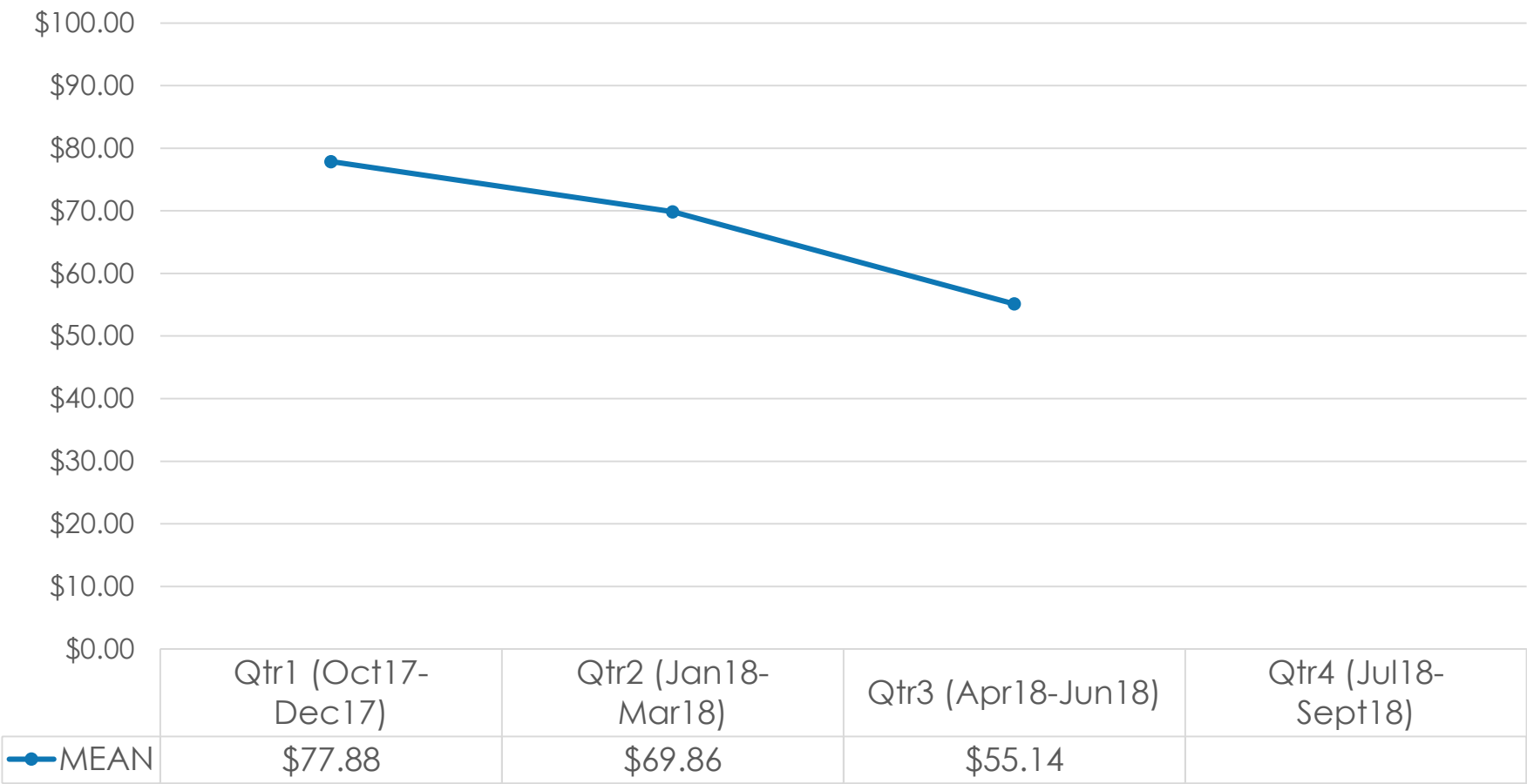
On-Island – FY2018 Tracking

Gift/ Souvenir – Friends/ Family



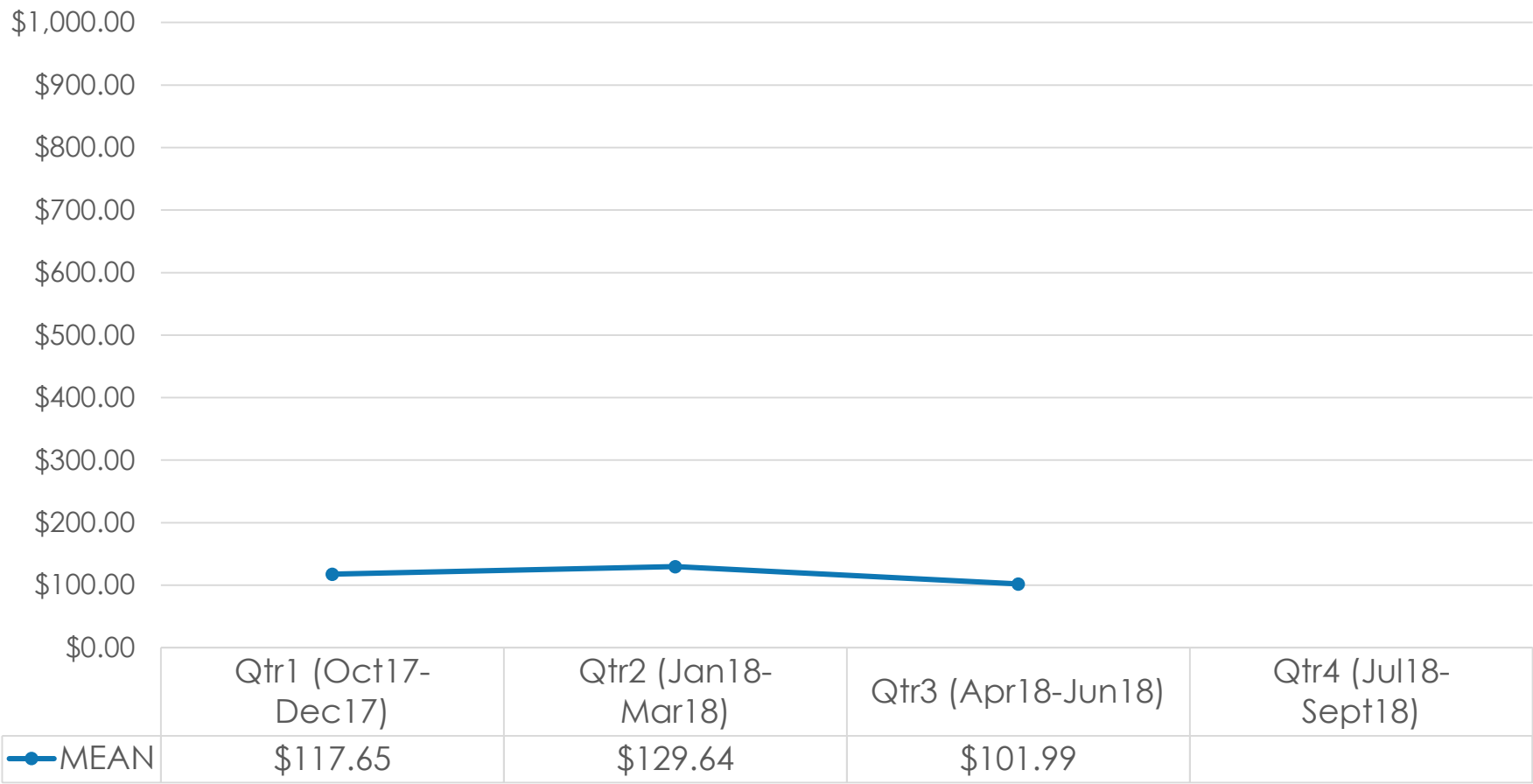
On-Island – FY2018 Tracking

Local Transportation



On-Island – FY2018 Tracking

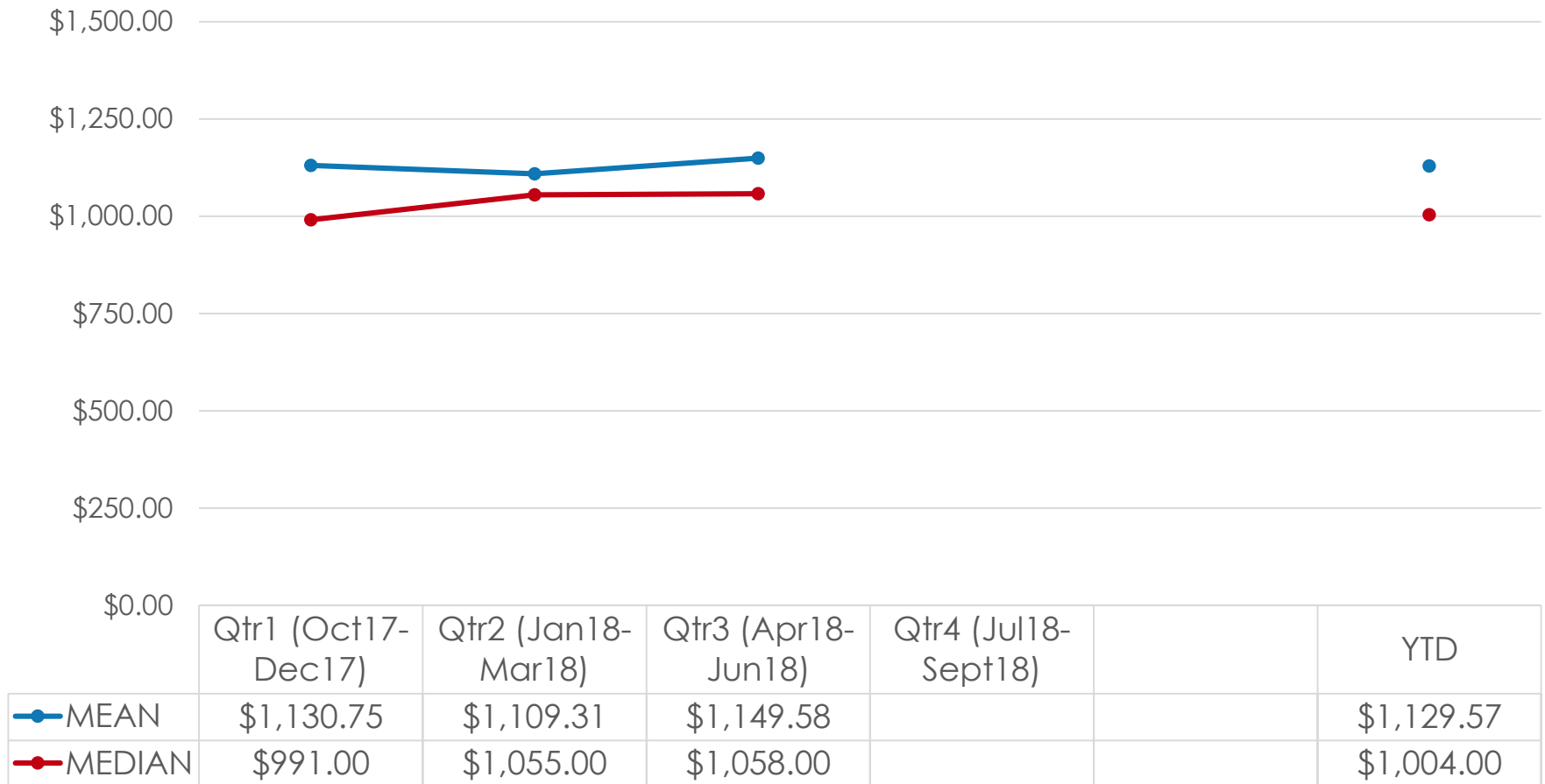
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,149.58 = overall mean average prepaid expense by respondent/ Per Person

TOTAL Per Person Expenditures – FY2018 Tracking



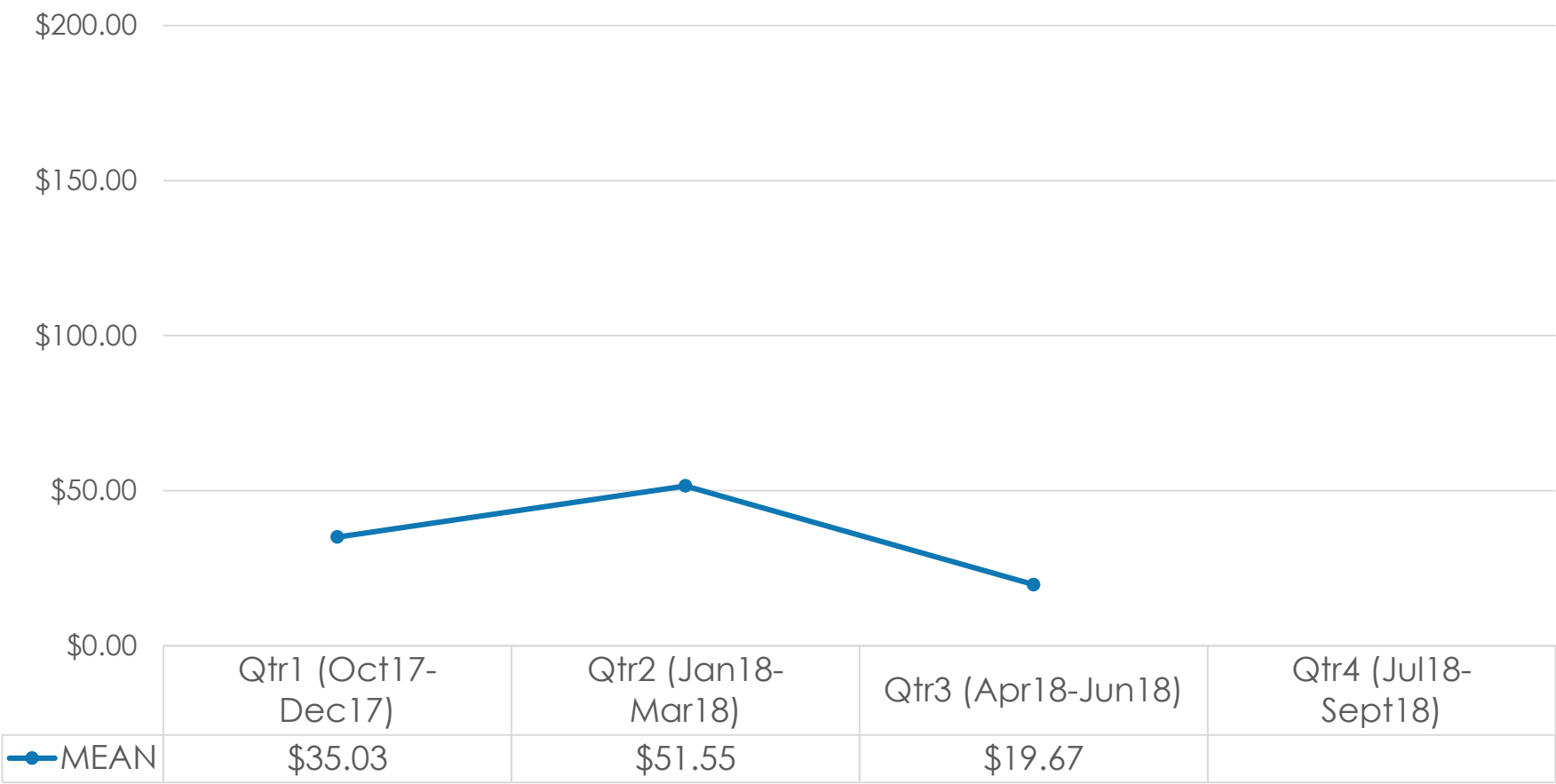
TOTAL Per Person Expenditures – Key Segments

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

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
TOTAL PP	Mean	\$1,149.58	\$601.10	\$1,139.55	\$1,096.32	\$928.00
	Median	\$1,058	\$601	\$1,059	\$1,032	\$967

Prepared by Anthology Research

GUAM AIRPORT EXPENDITURE – FY2018 Tracking

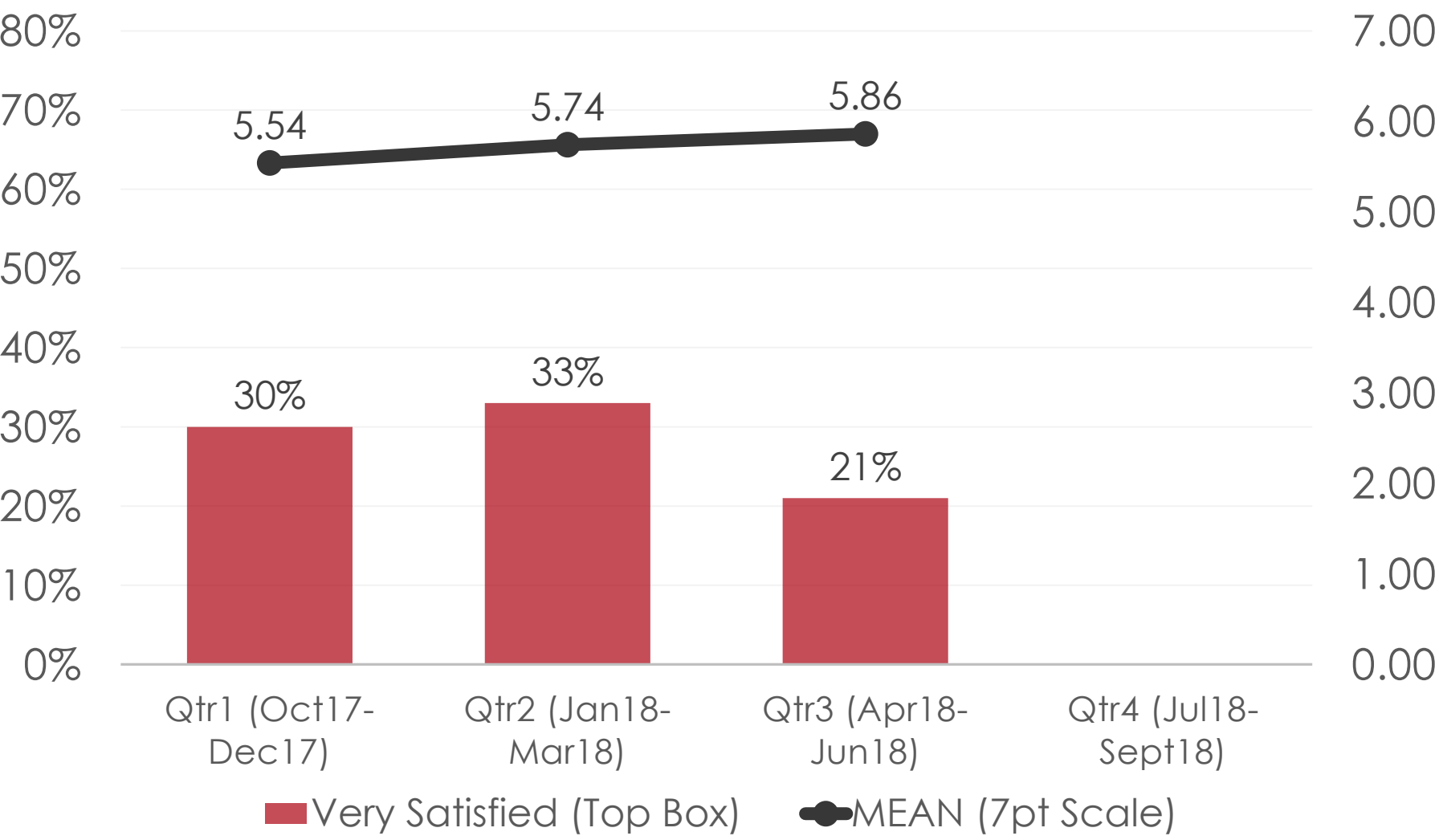


SECTION 4

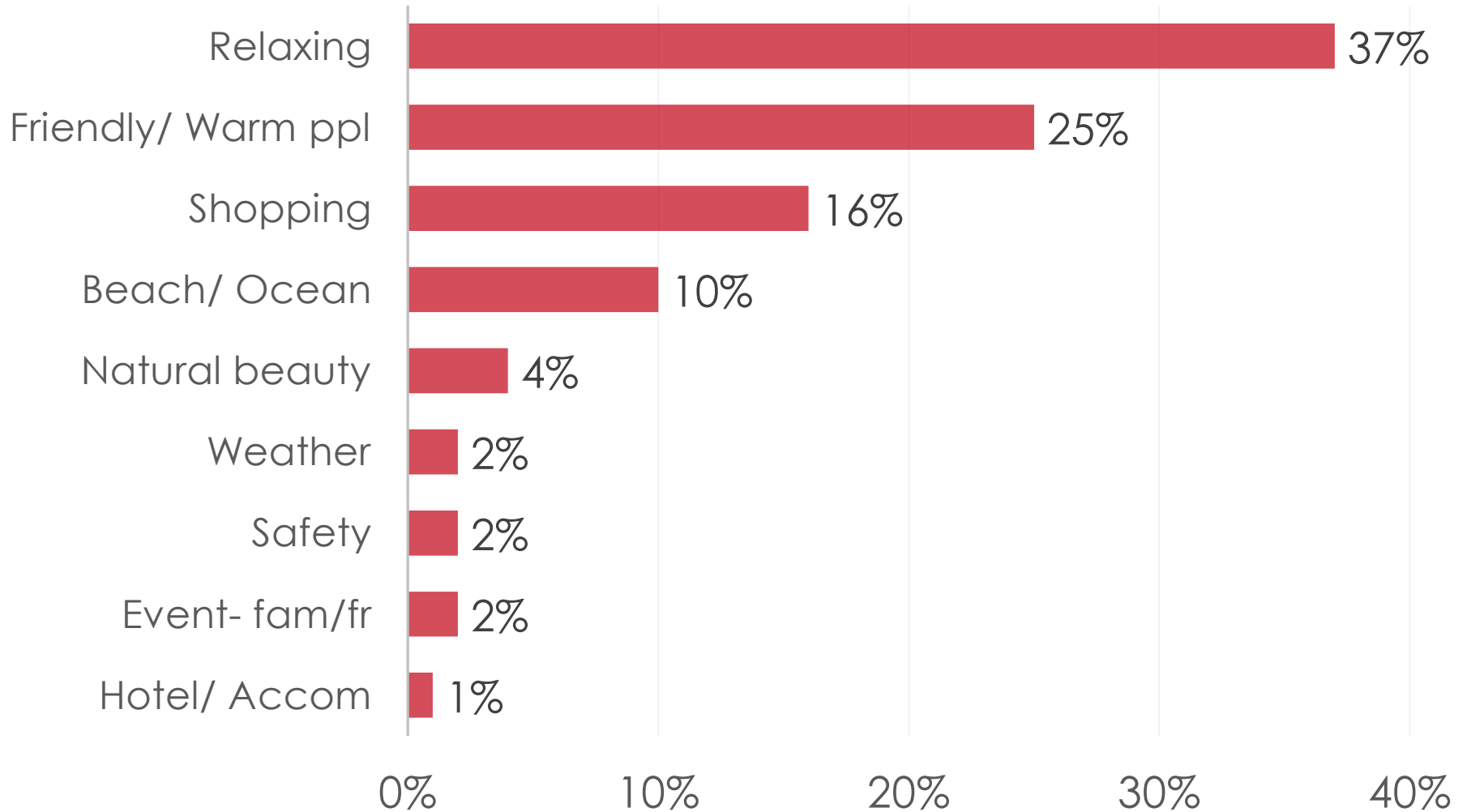
VISITOR SATISFACTION

BEHAVIOR

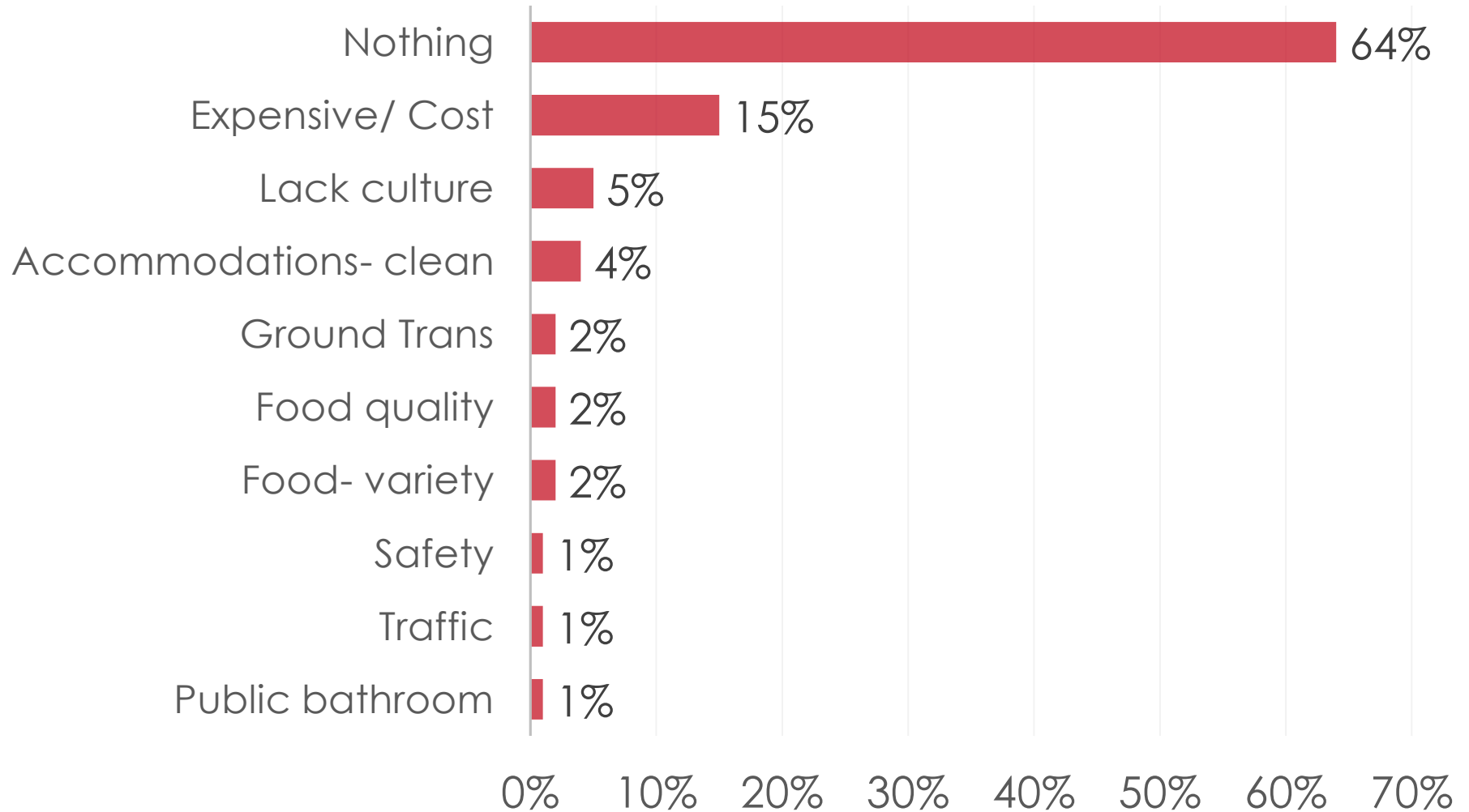
OVERALL SATISFACTION



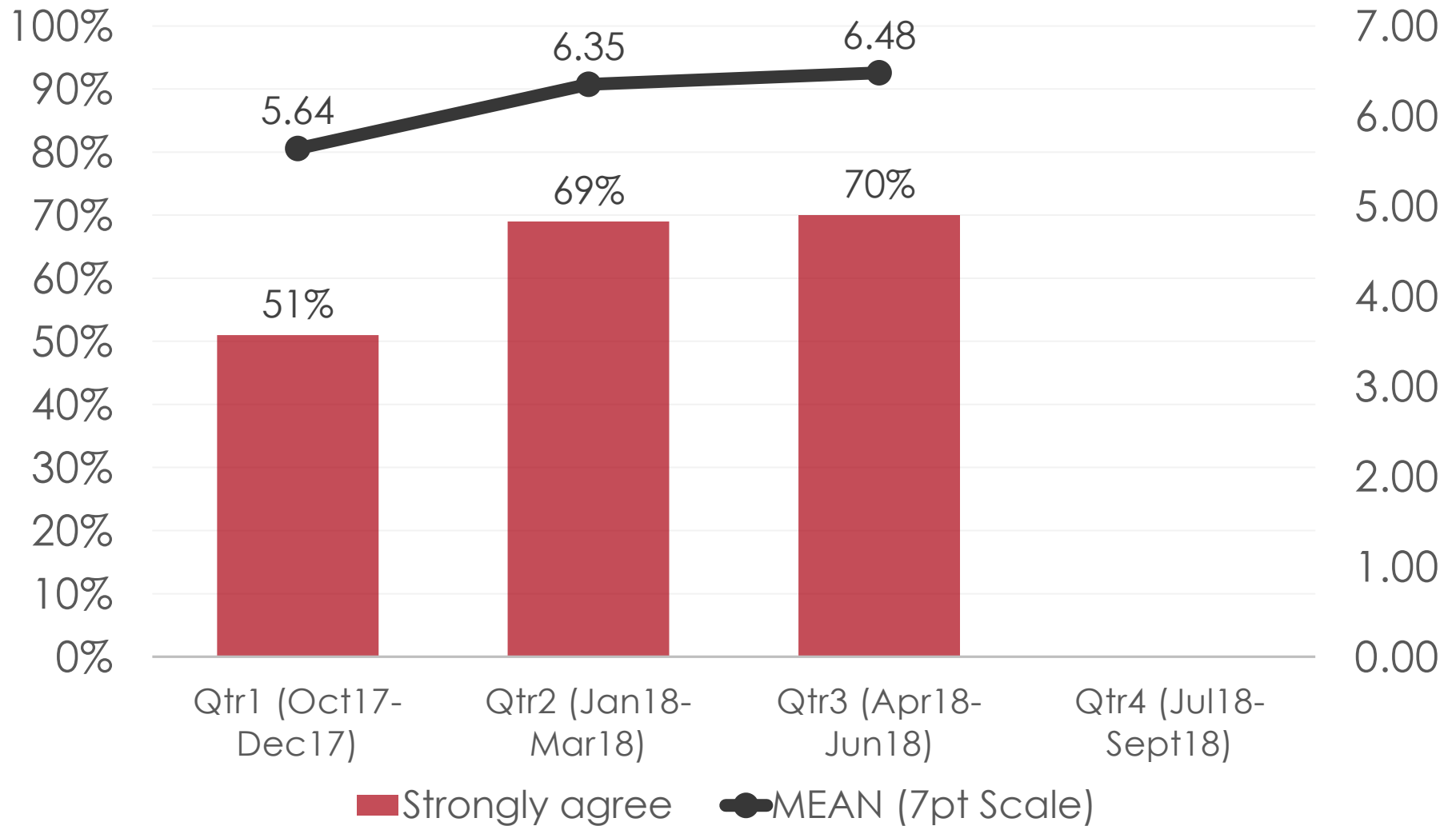
Positive Aspect of Trip



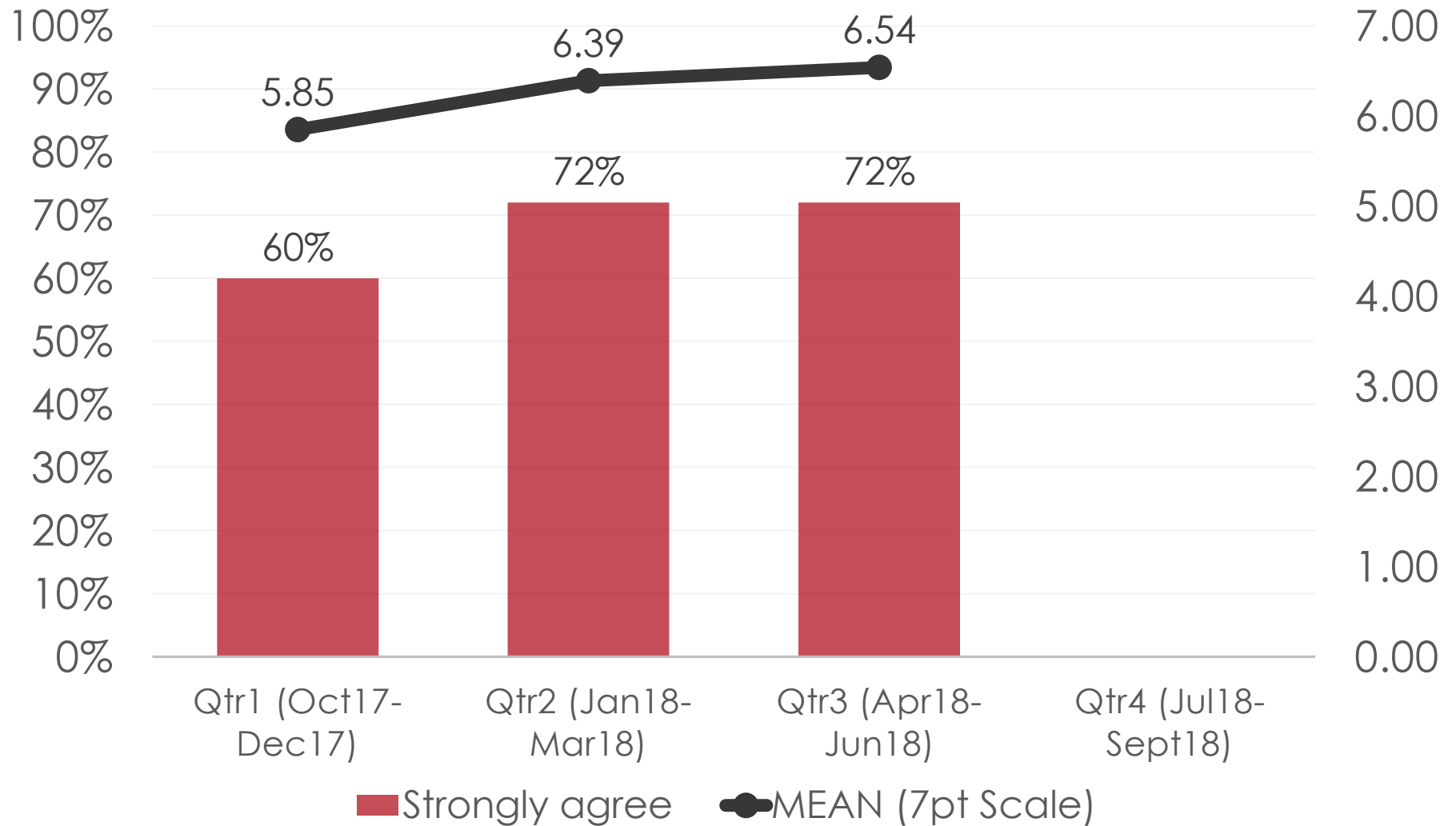
Negative Aspect of Trip



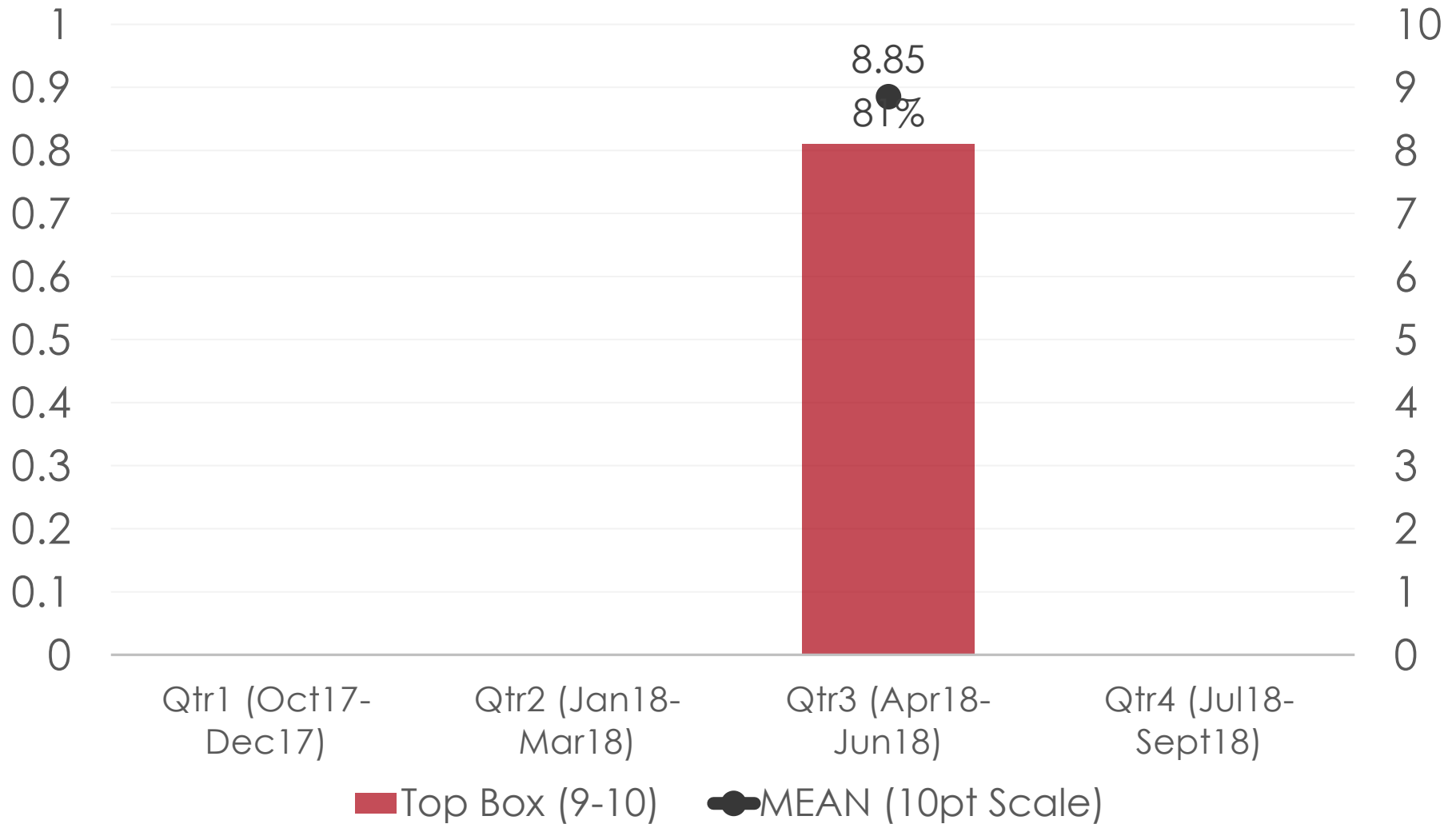
Guam was better than expected



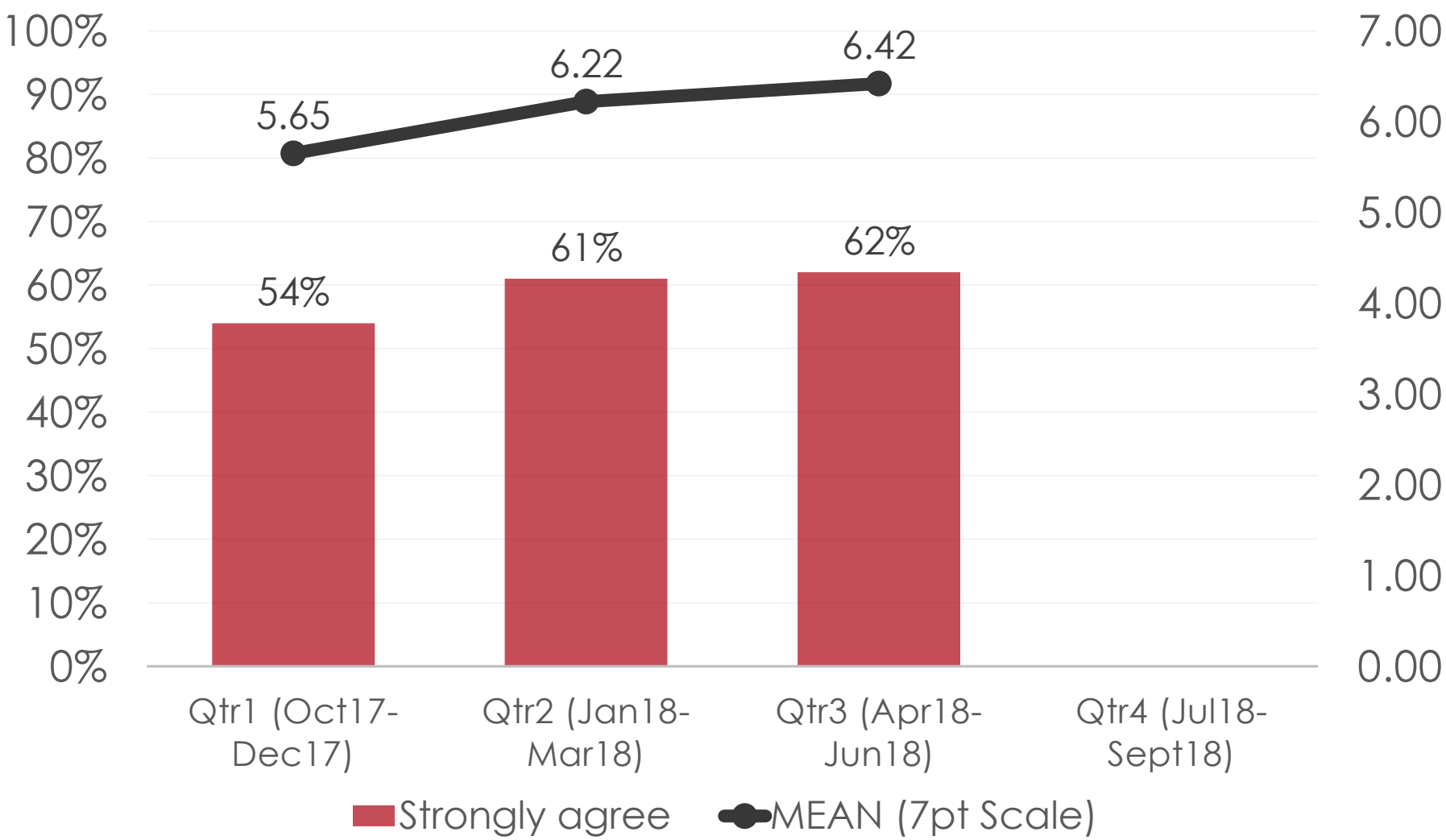
I had no communication problems



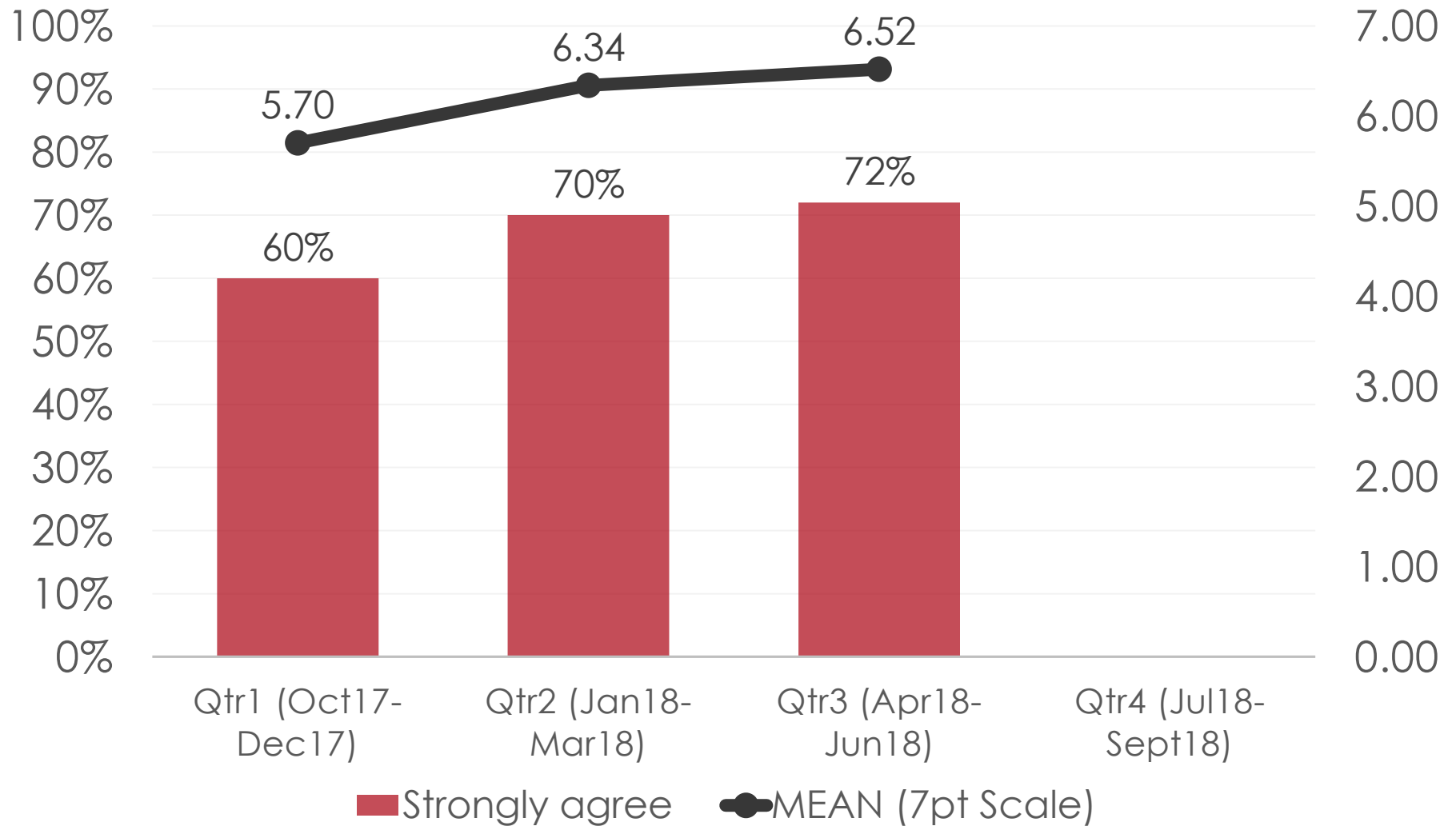
Recommend Guam - family & friends



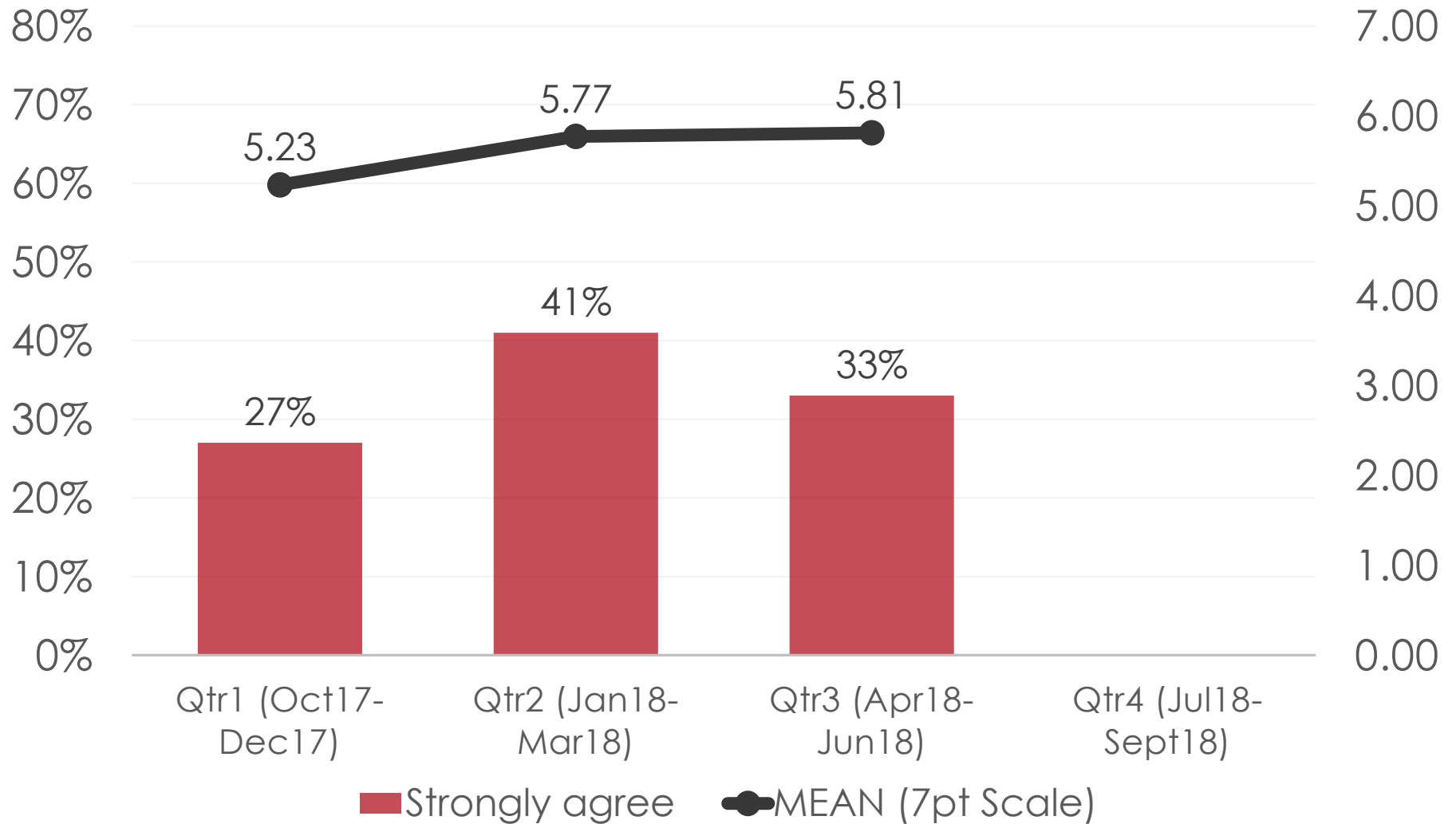
Sites on Guam were attractive



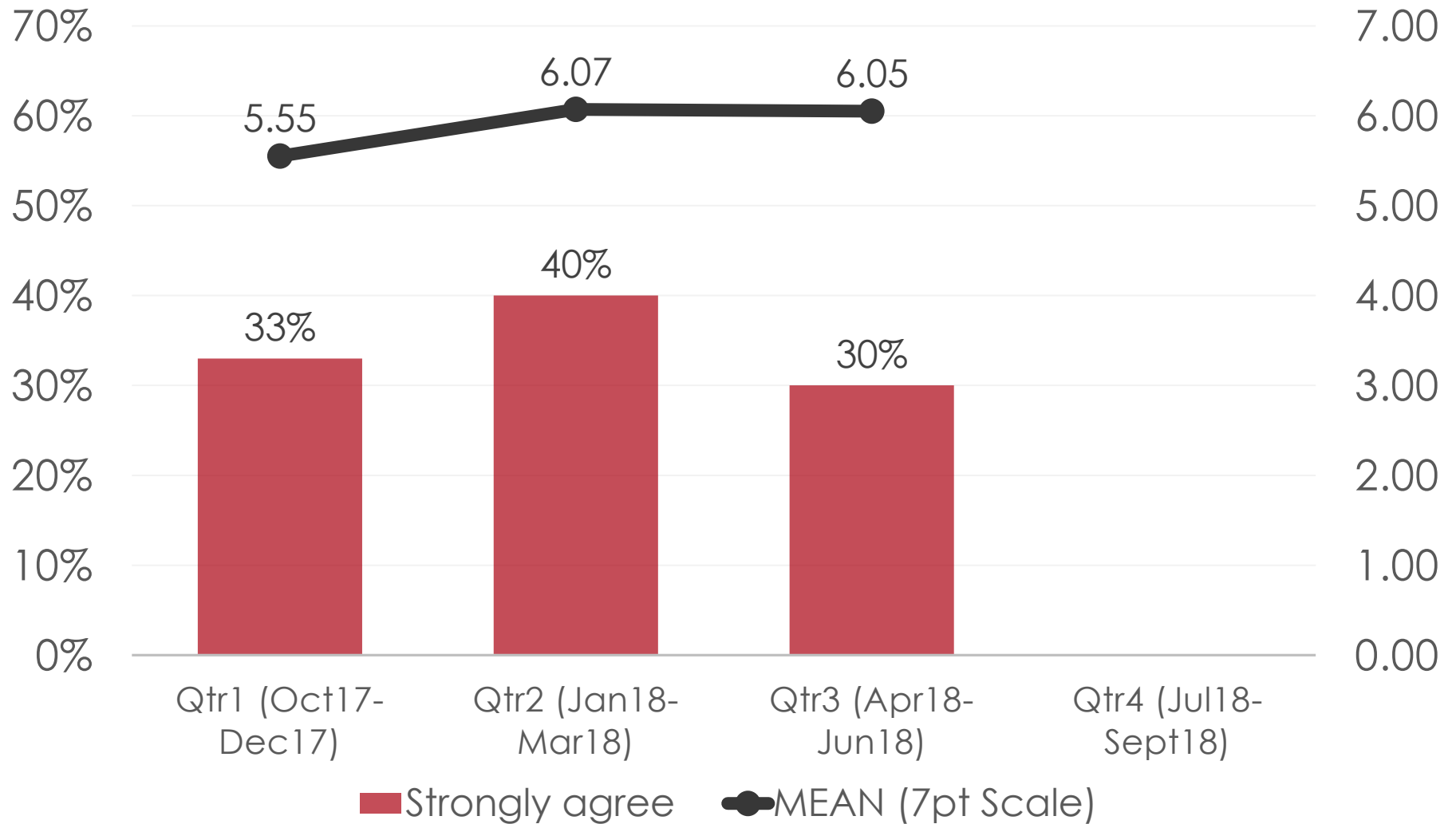
I plan to visit Guam again



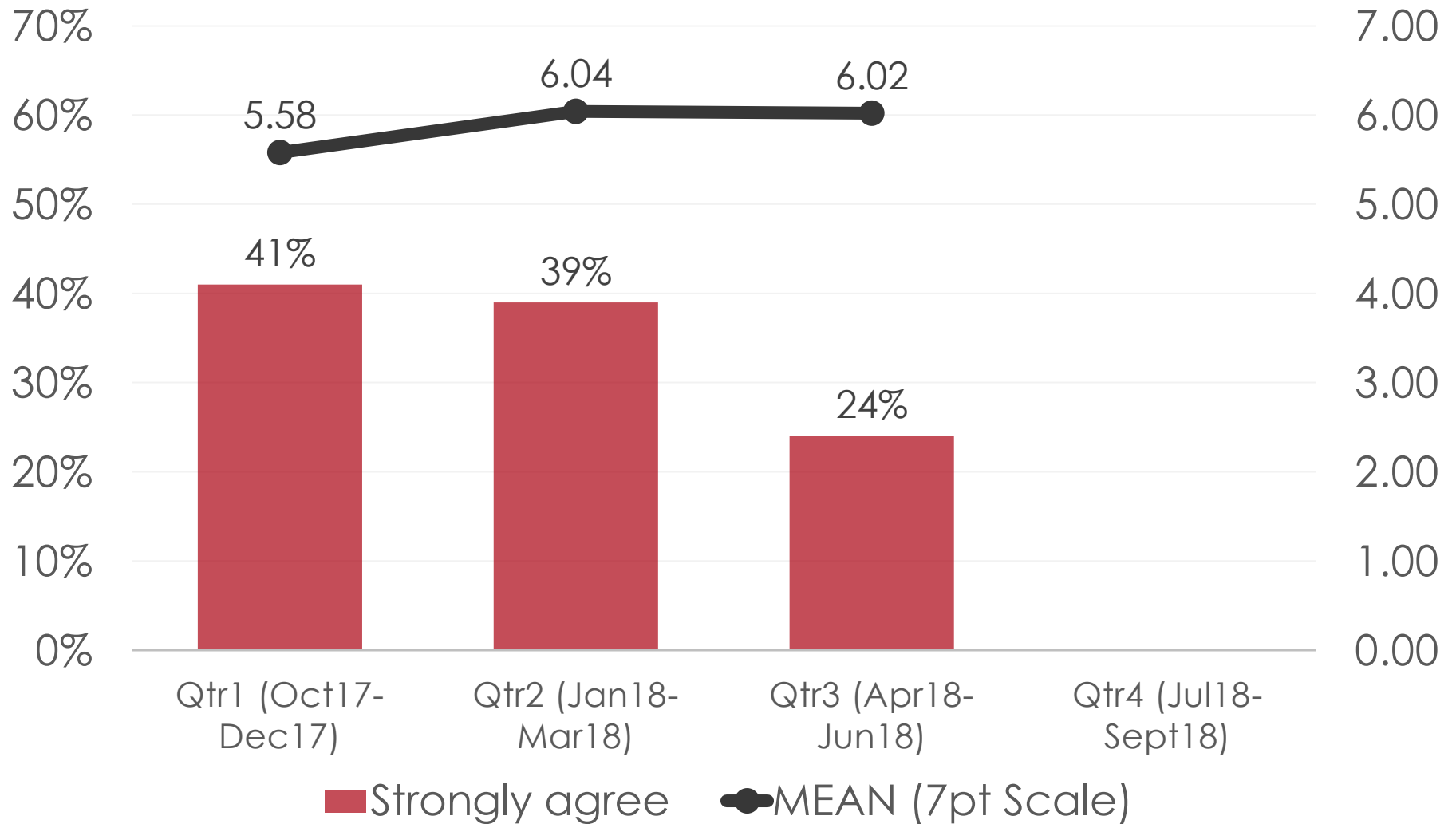
Not enough night time activities



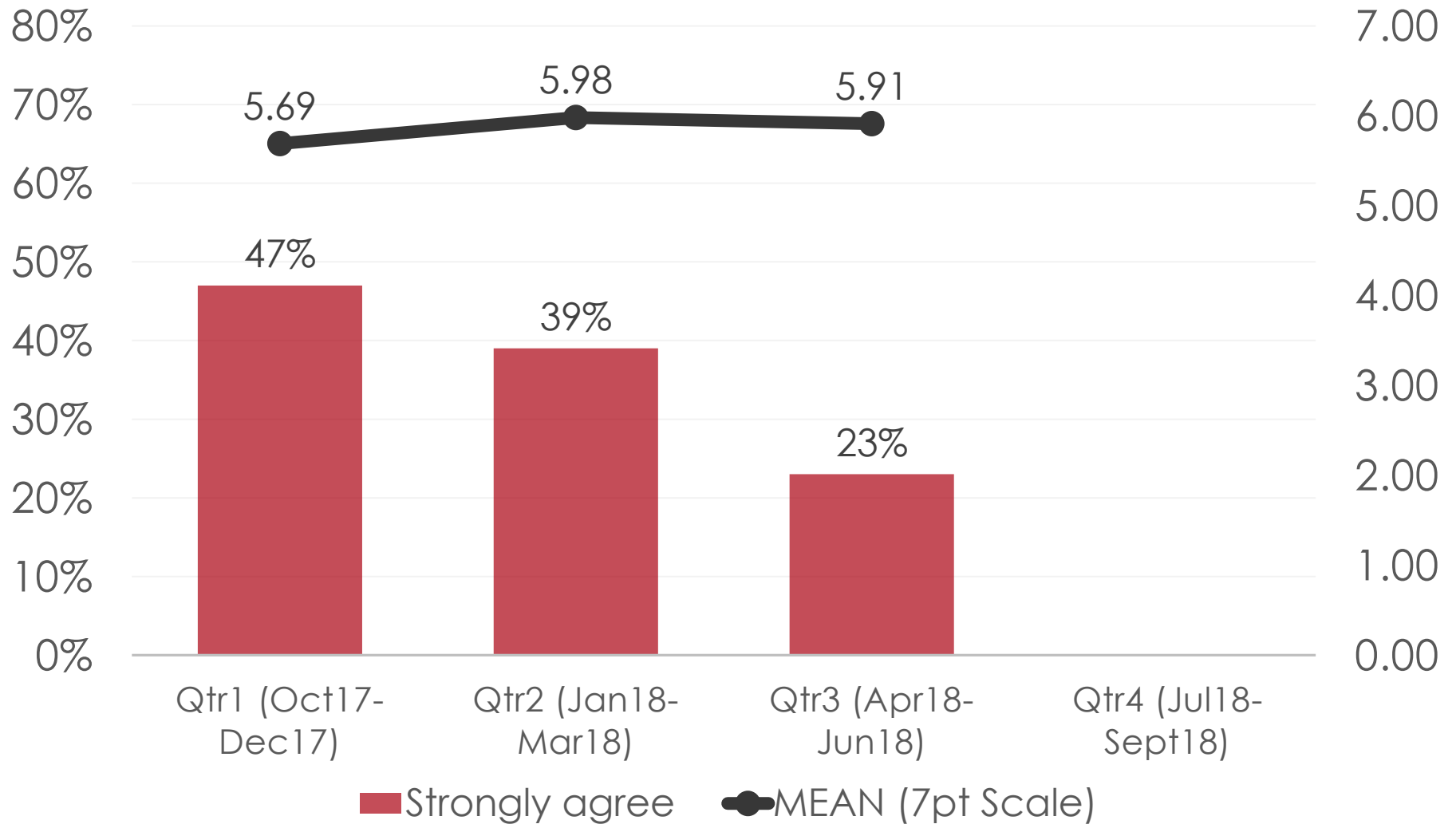
Tour guides were professional



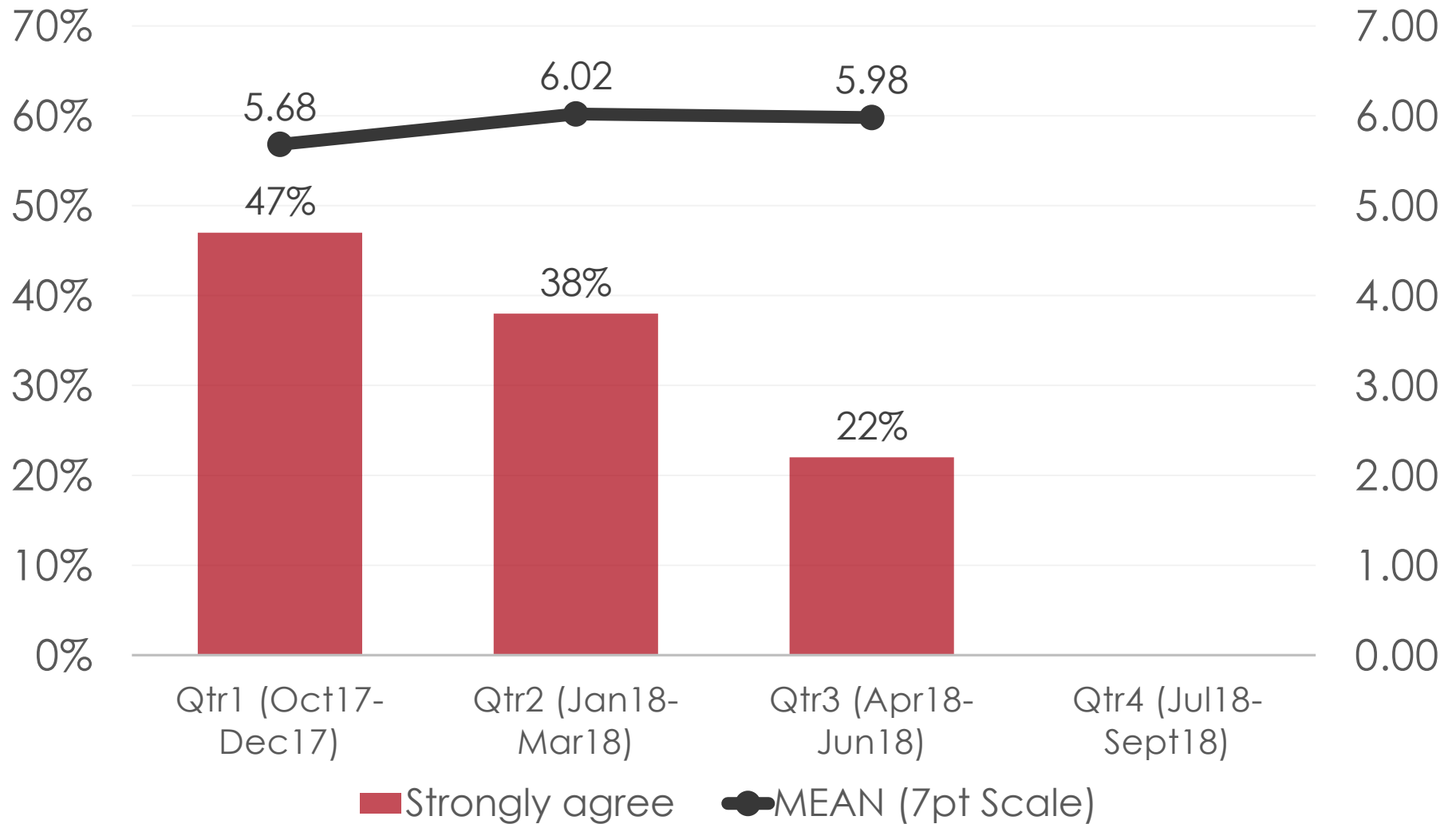
Tour drivers were professional



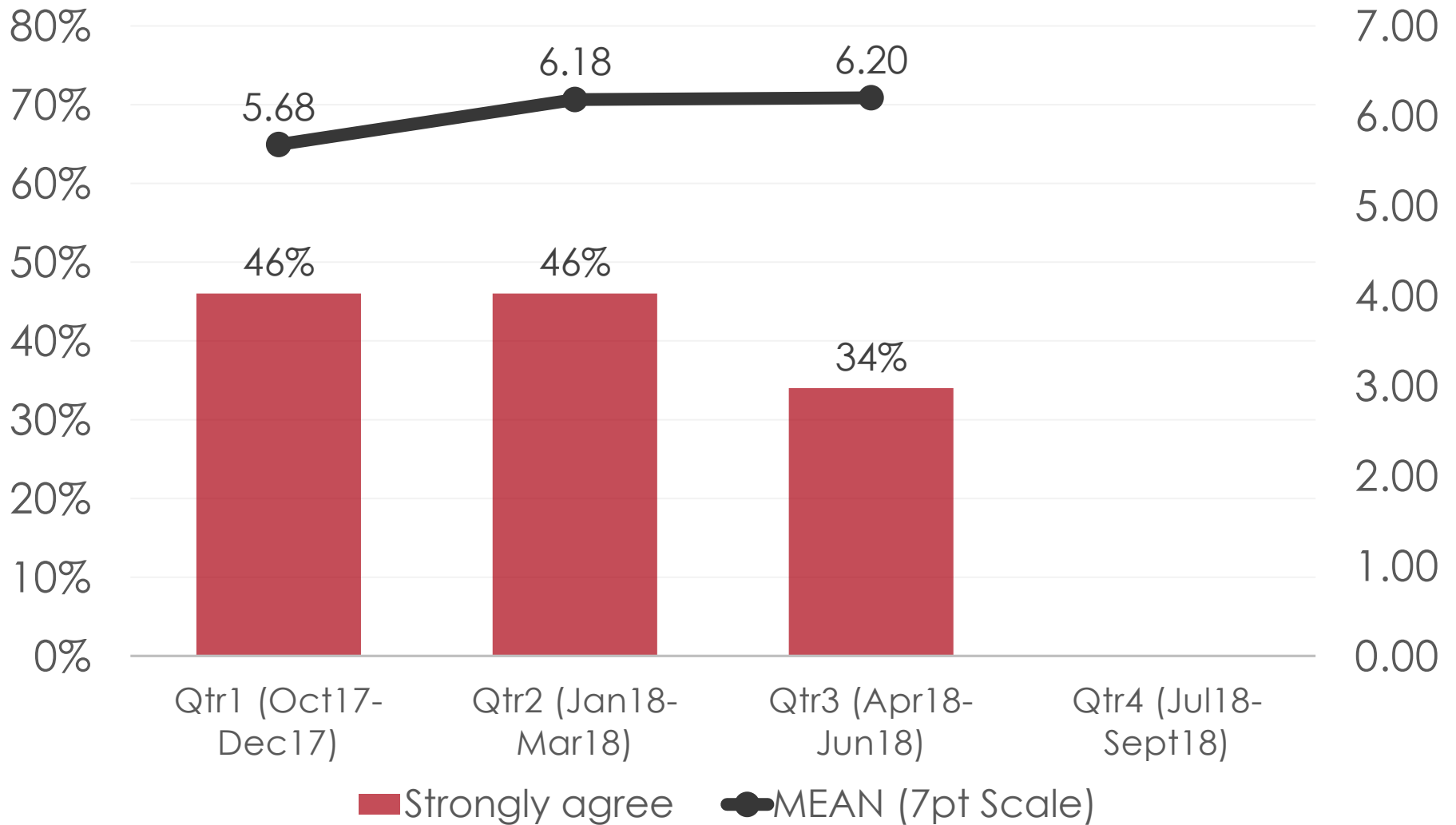
Taxi drivers were professional



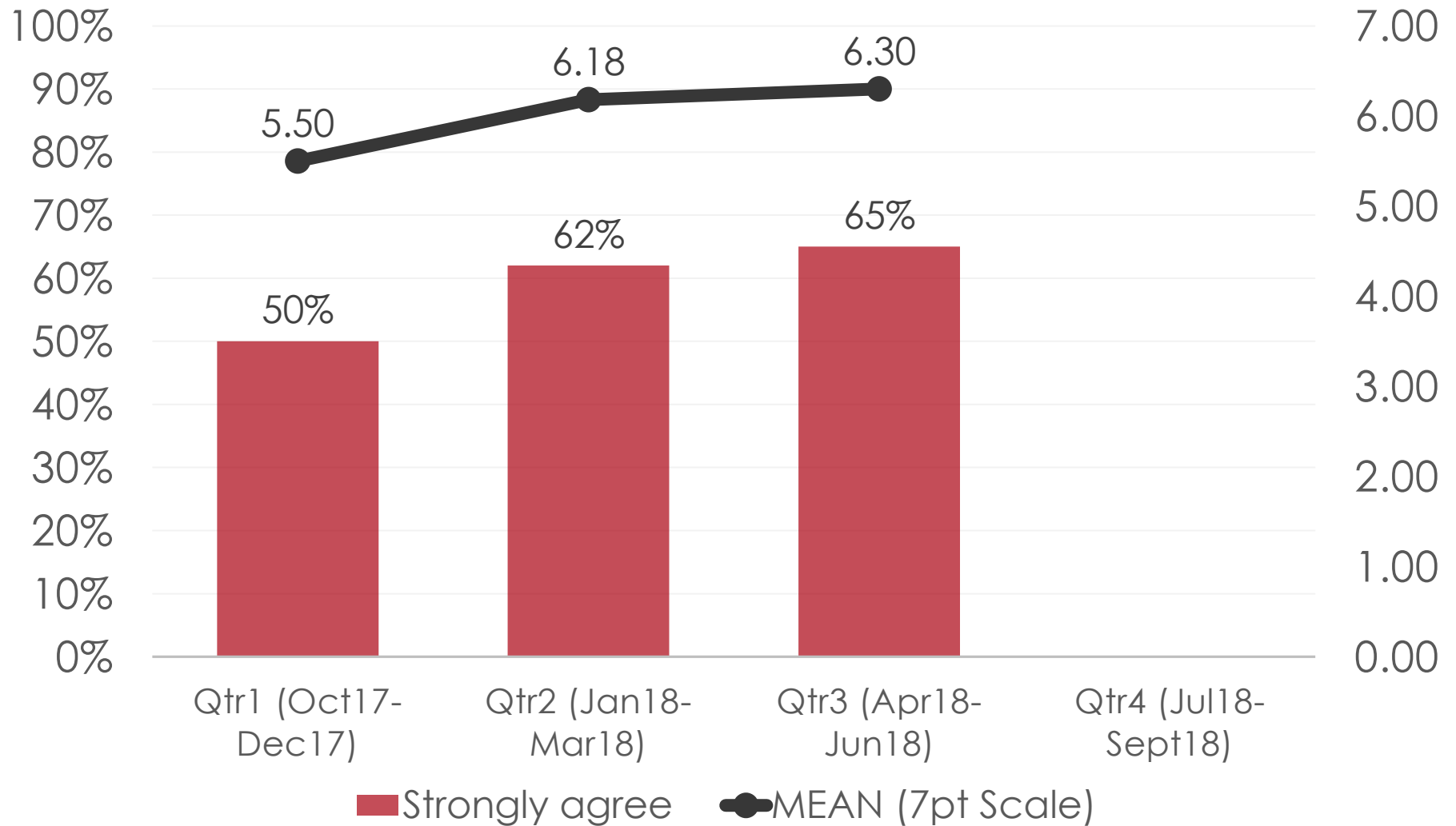
Taxis were clean



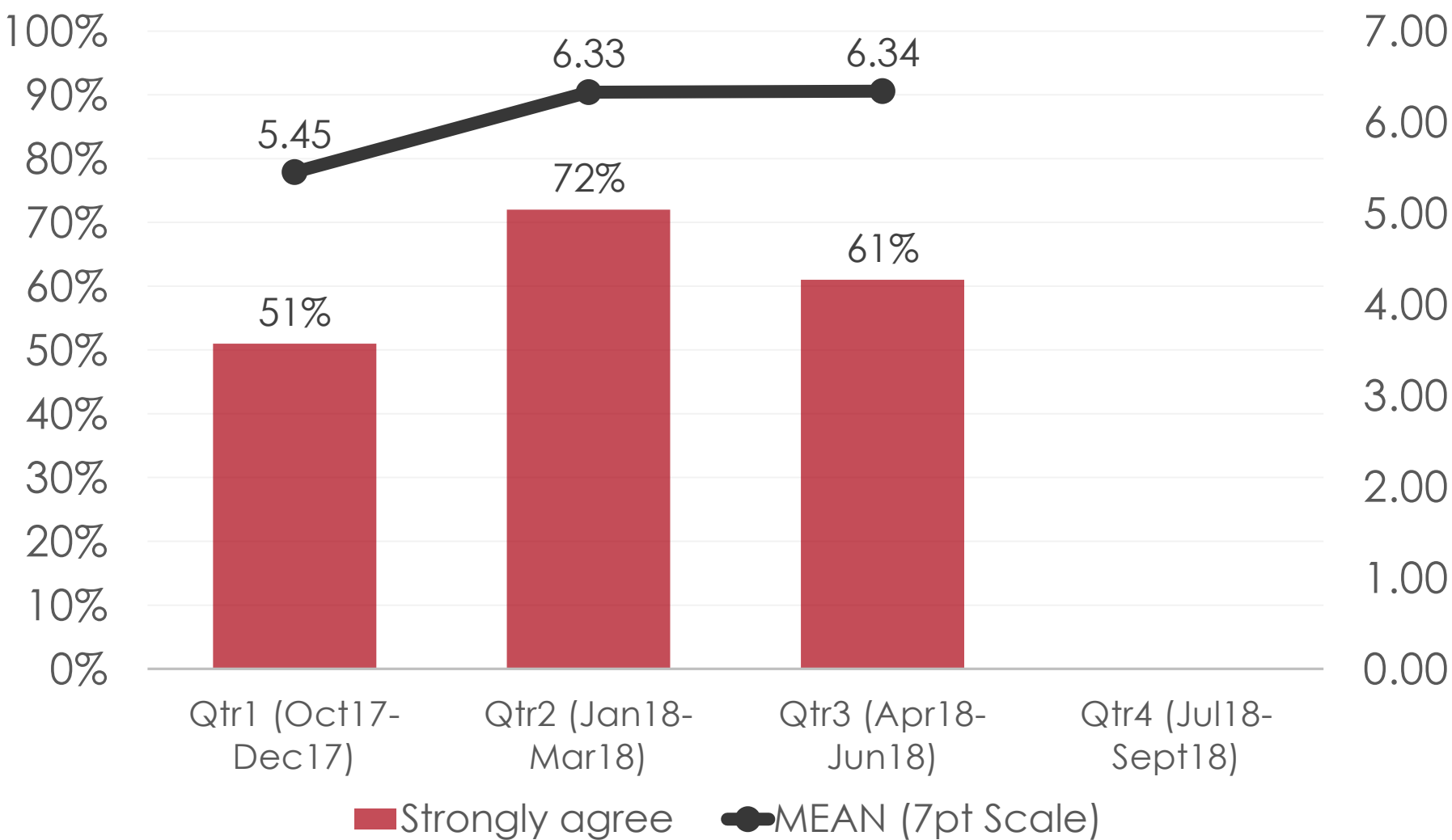
Guam airport was clean



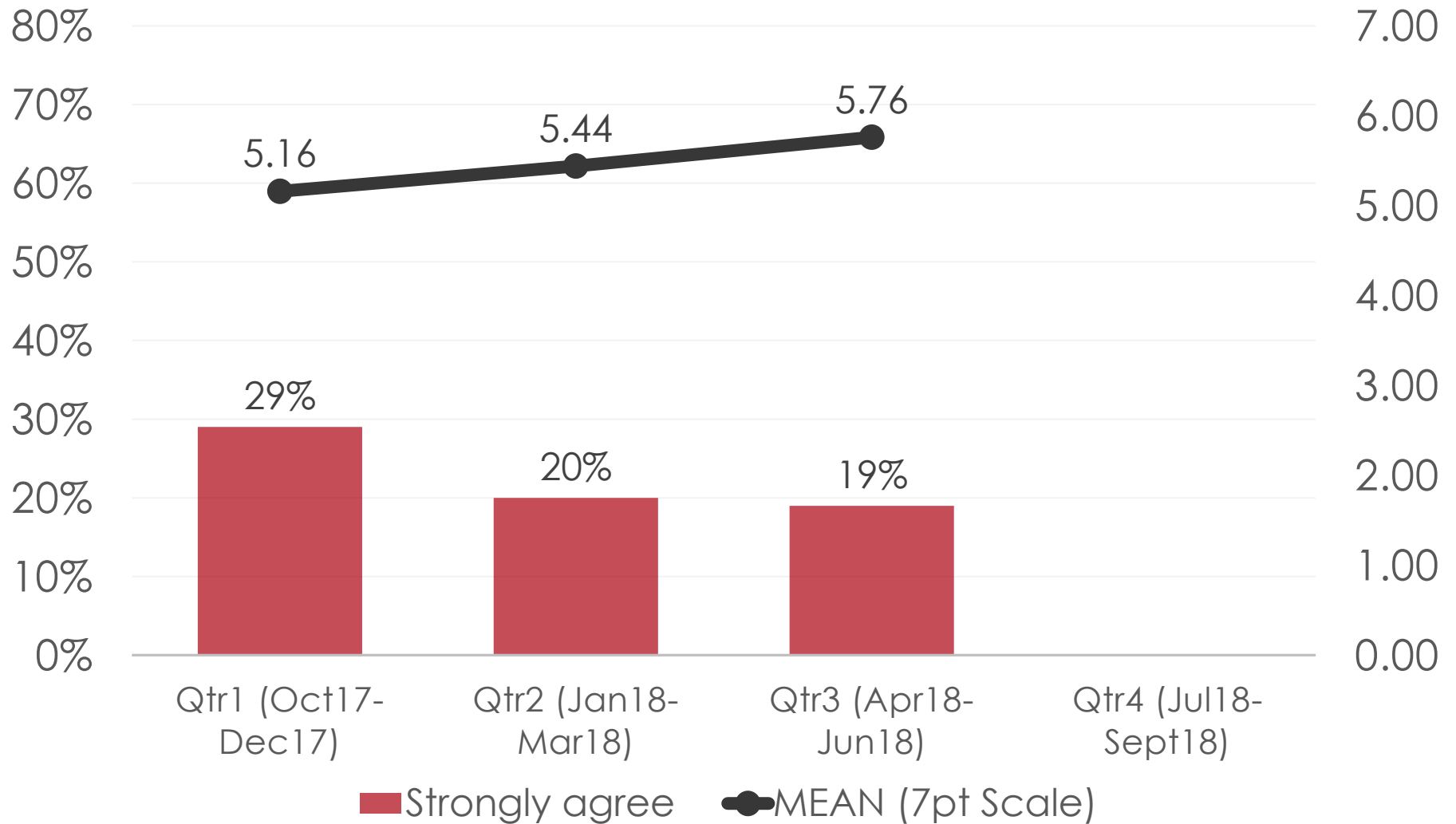
Ease of getting around



Safety walking around at night

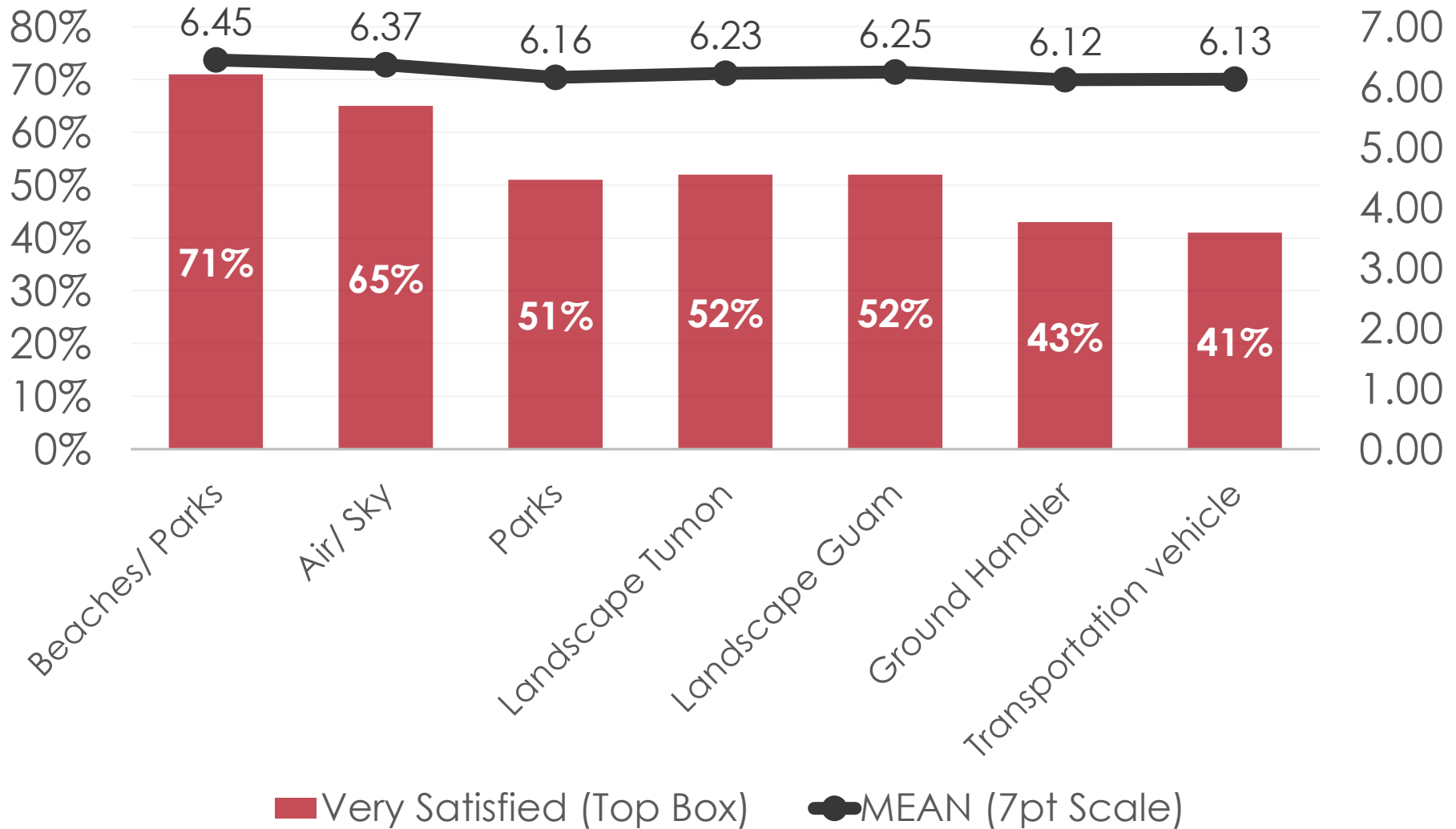


Price of things on Guam

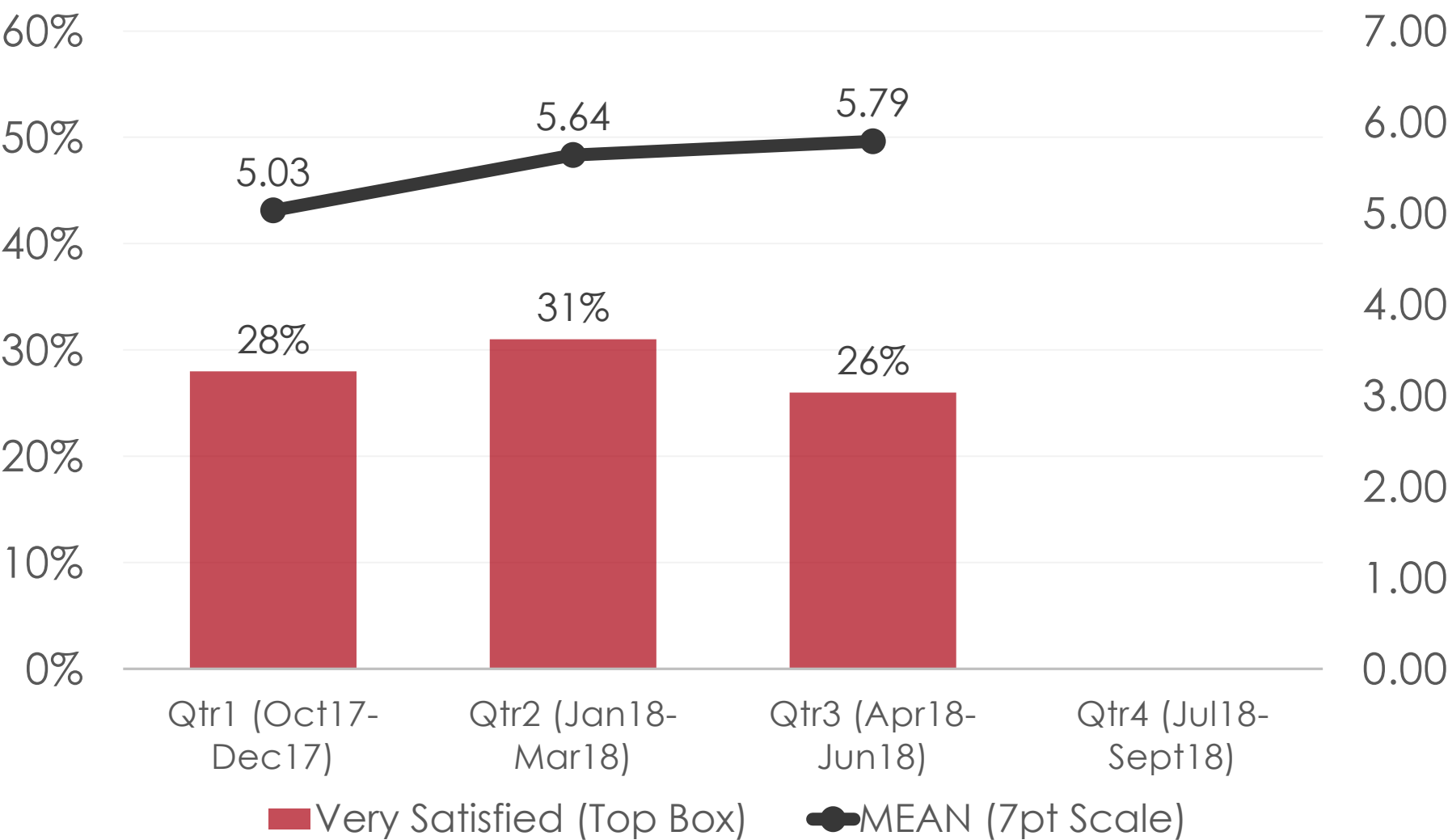


GENERAL SATISFACTION –

Quality/ Cleanliness

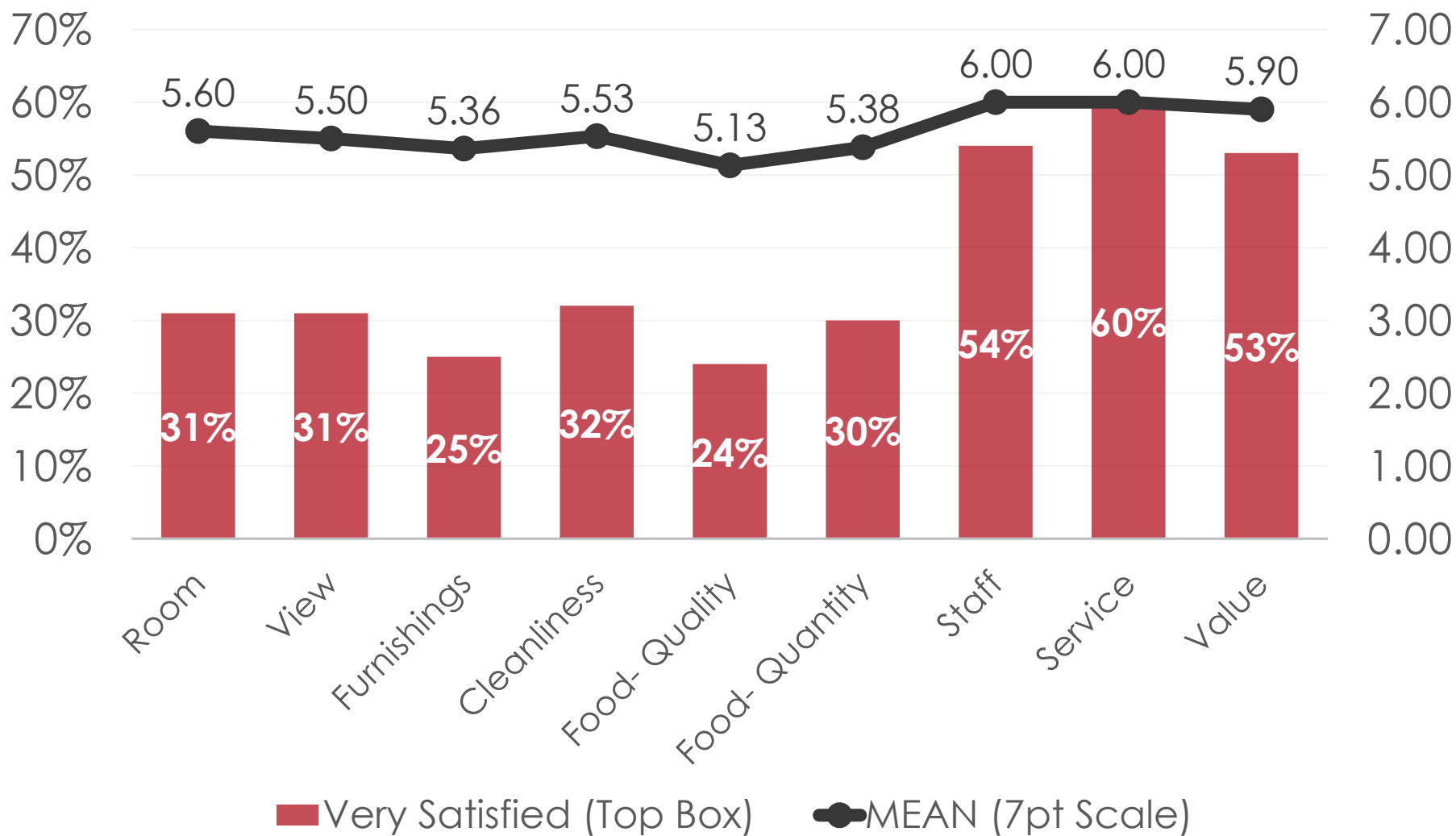


ACCOMMODATIONS – OVERALL SATISFACTION

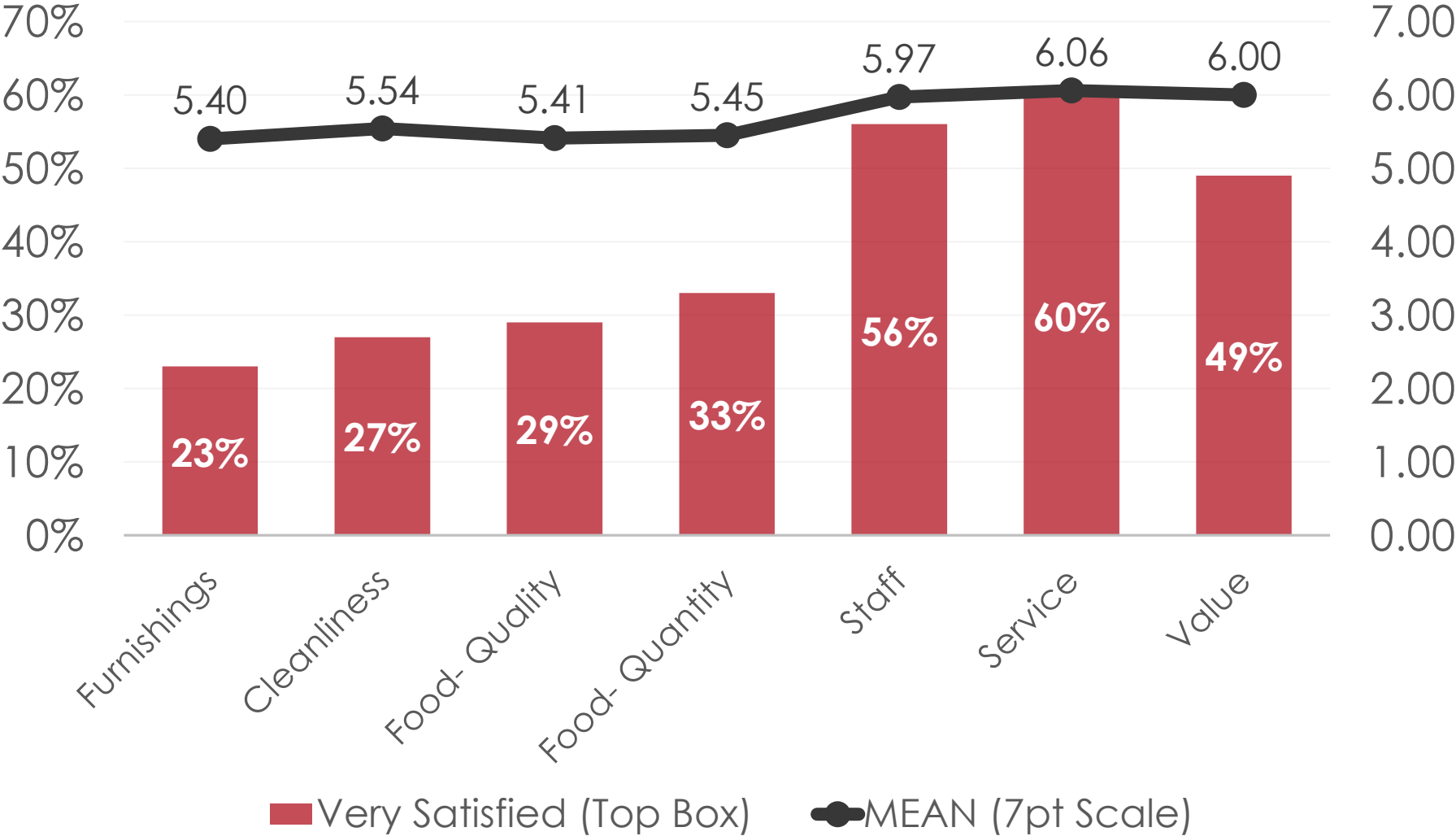


ACCOMMODATIONS –

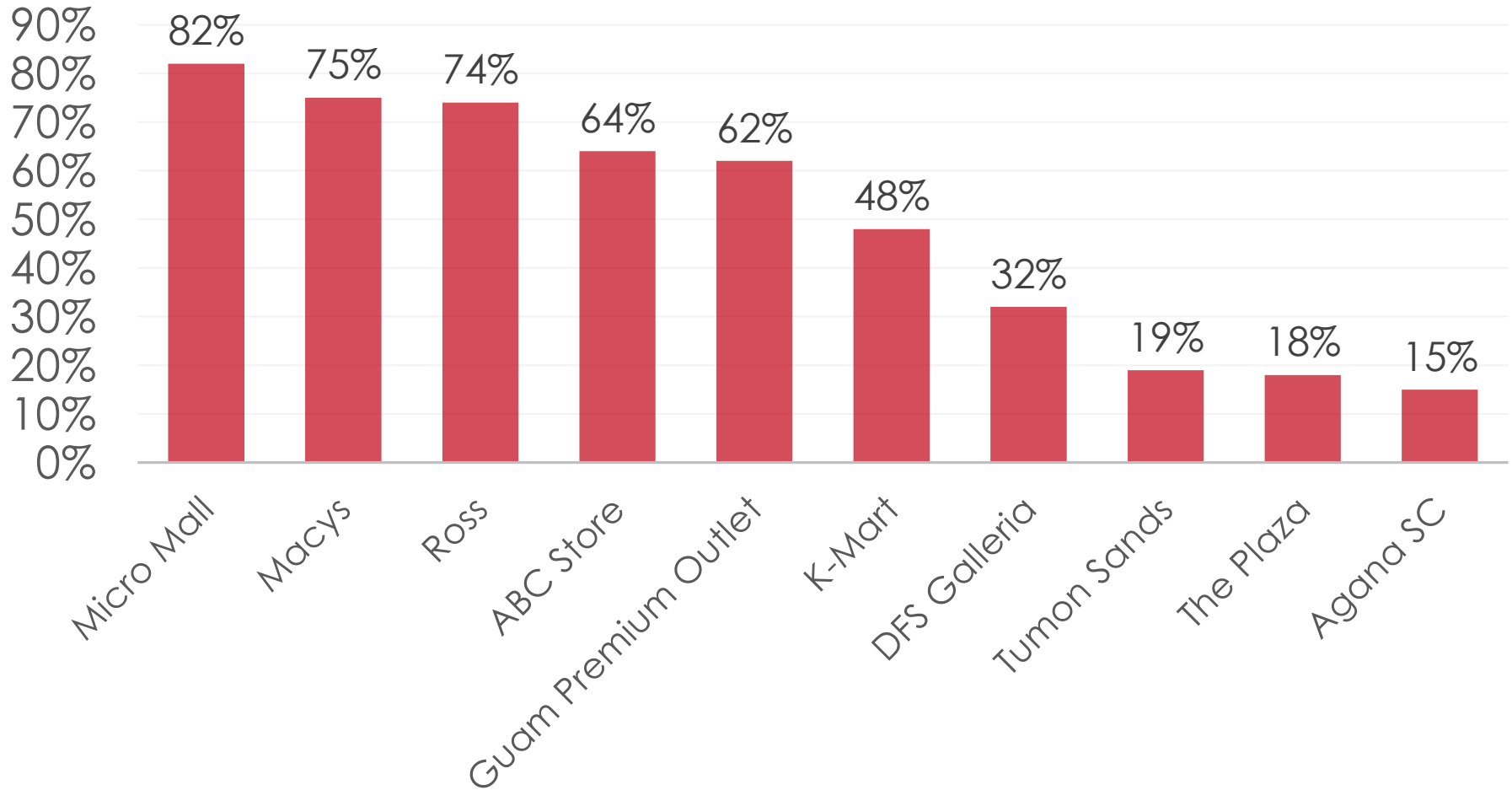
Satisfaction by Category



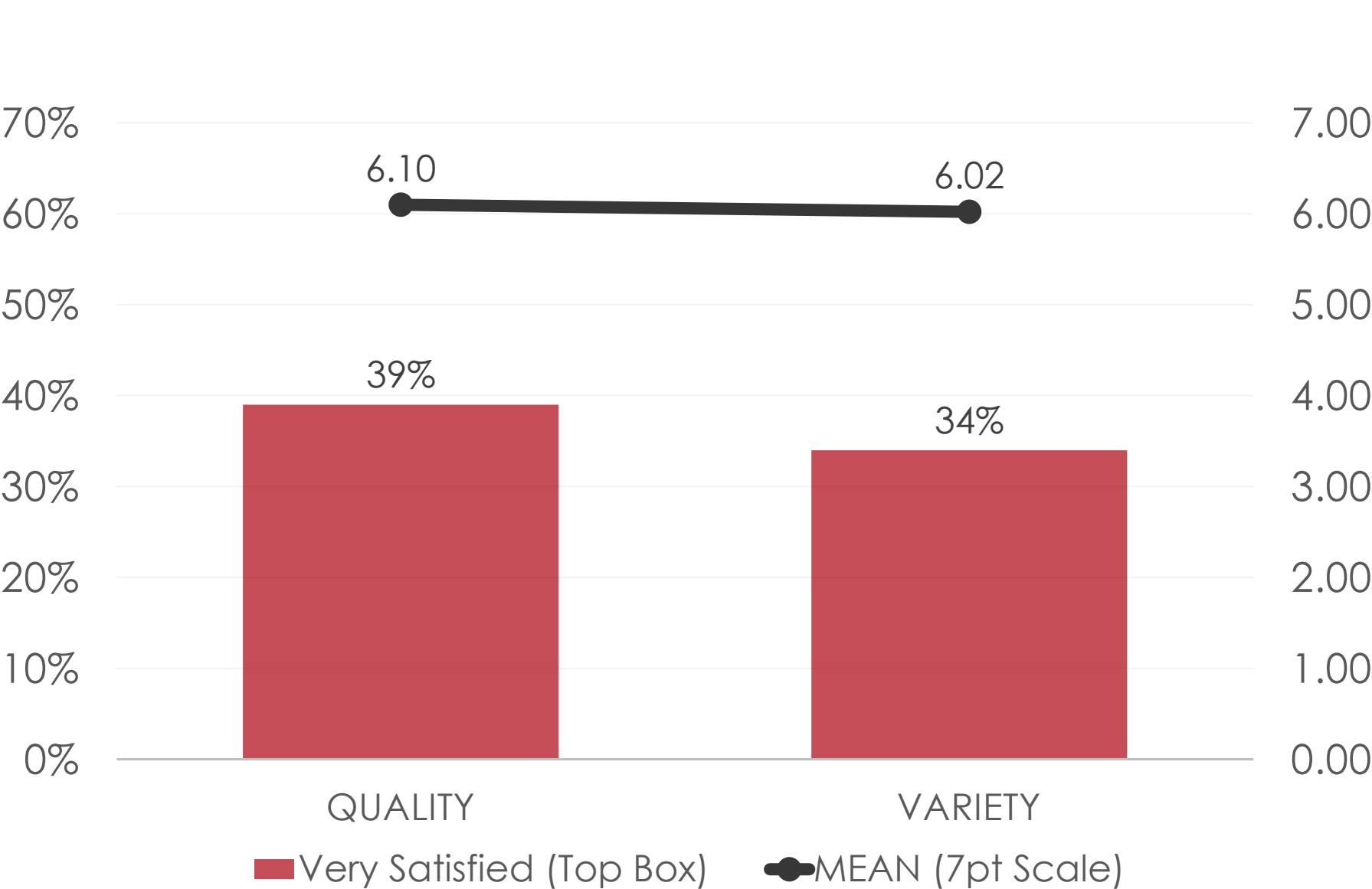
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



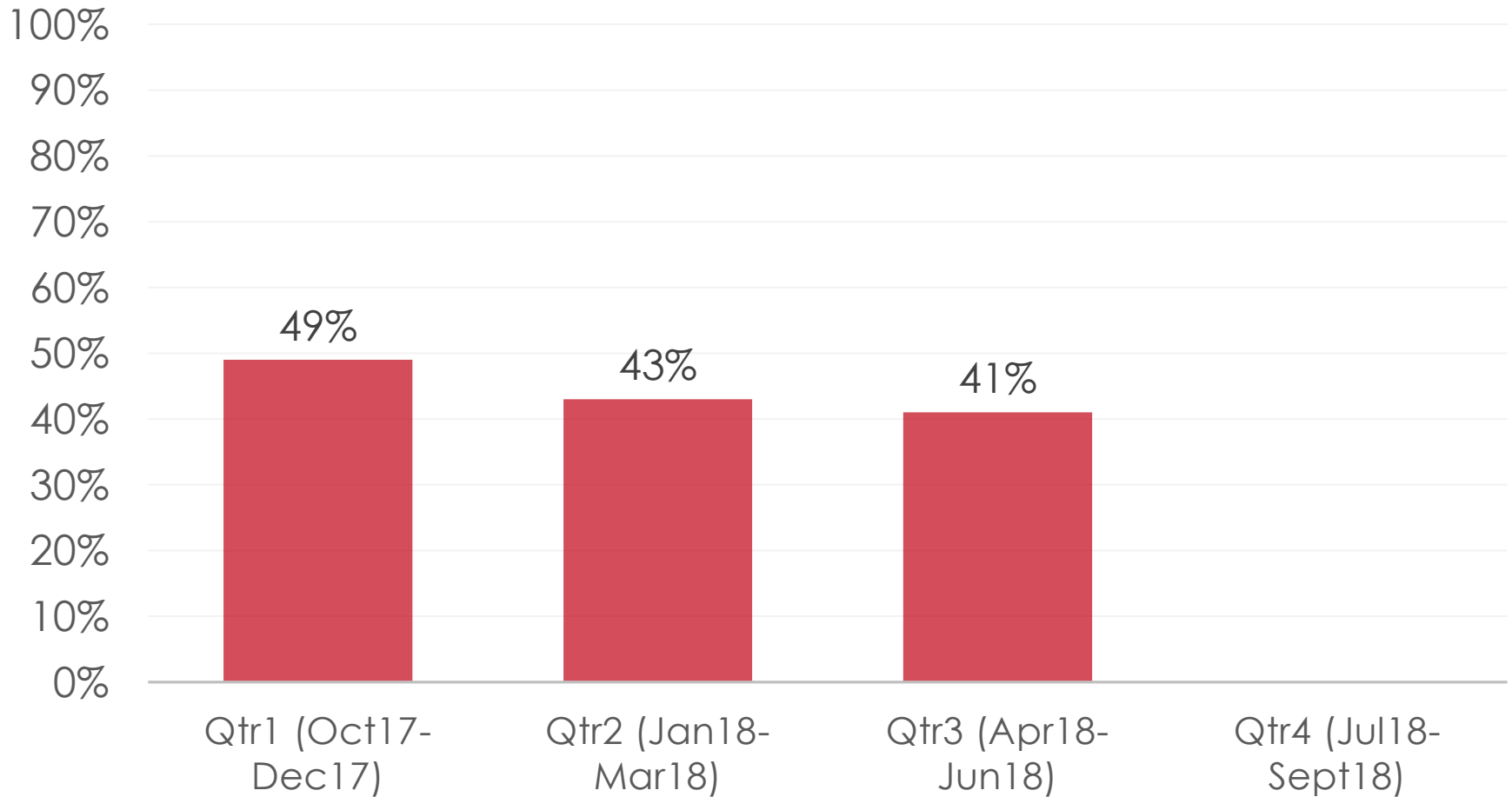
Shopping Malls/ Stores (Top Responses)



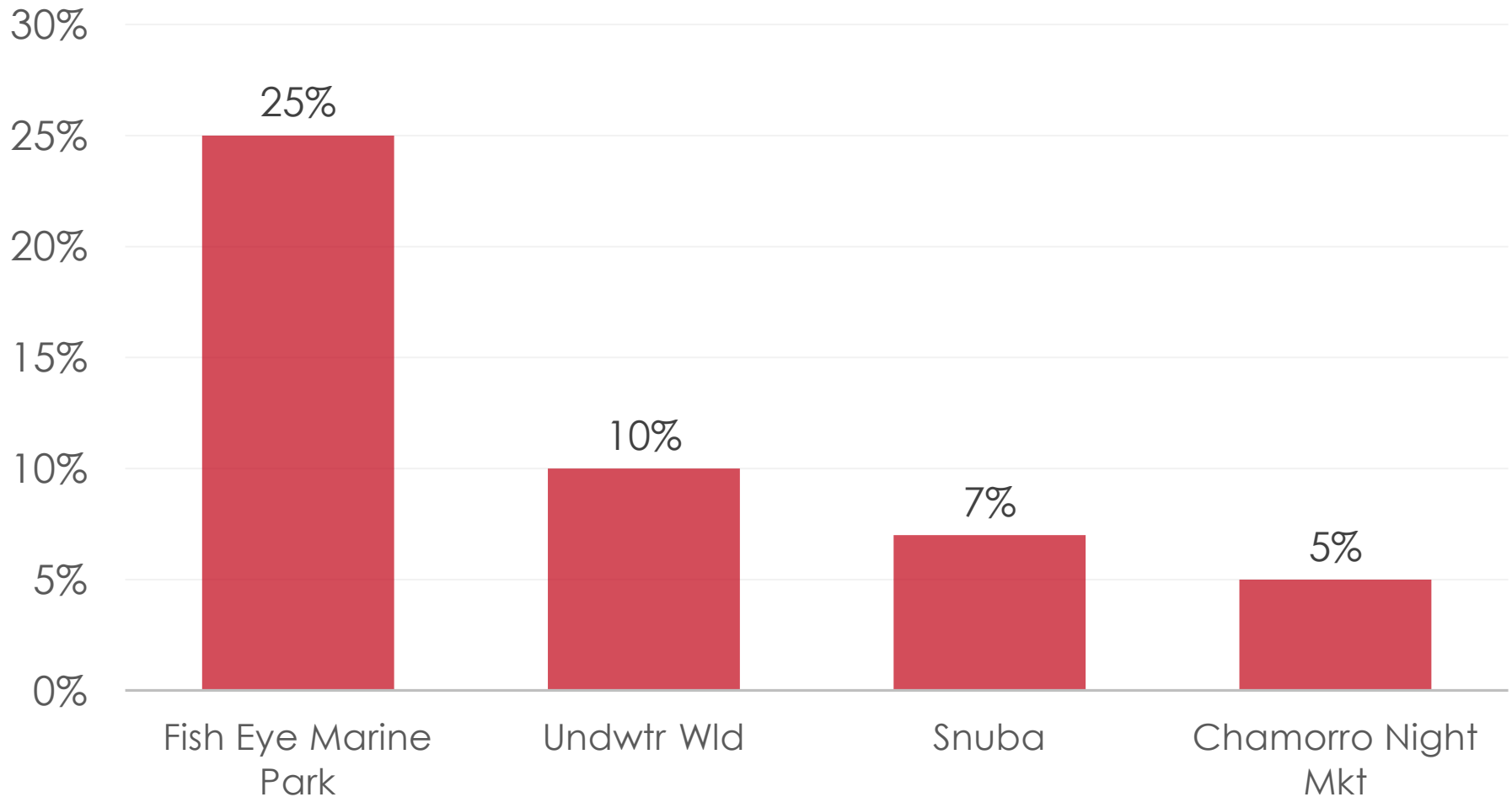
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – FY2018 Tracking

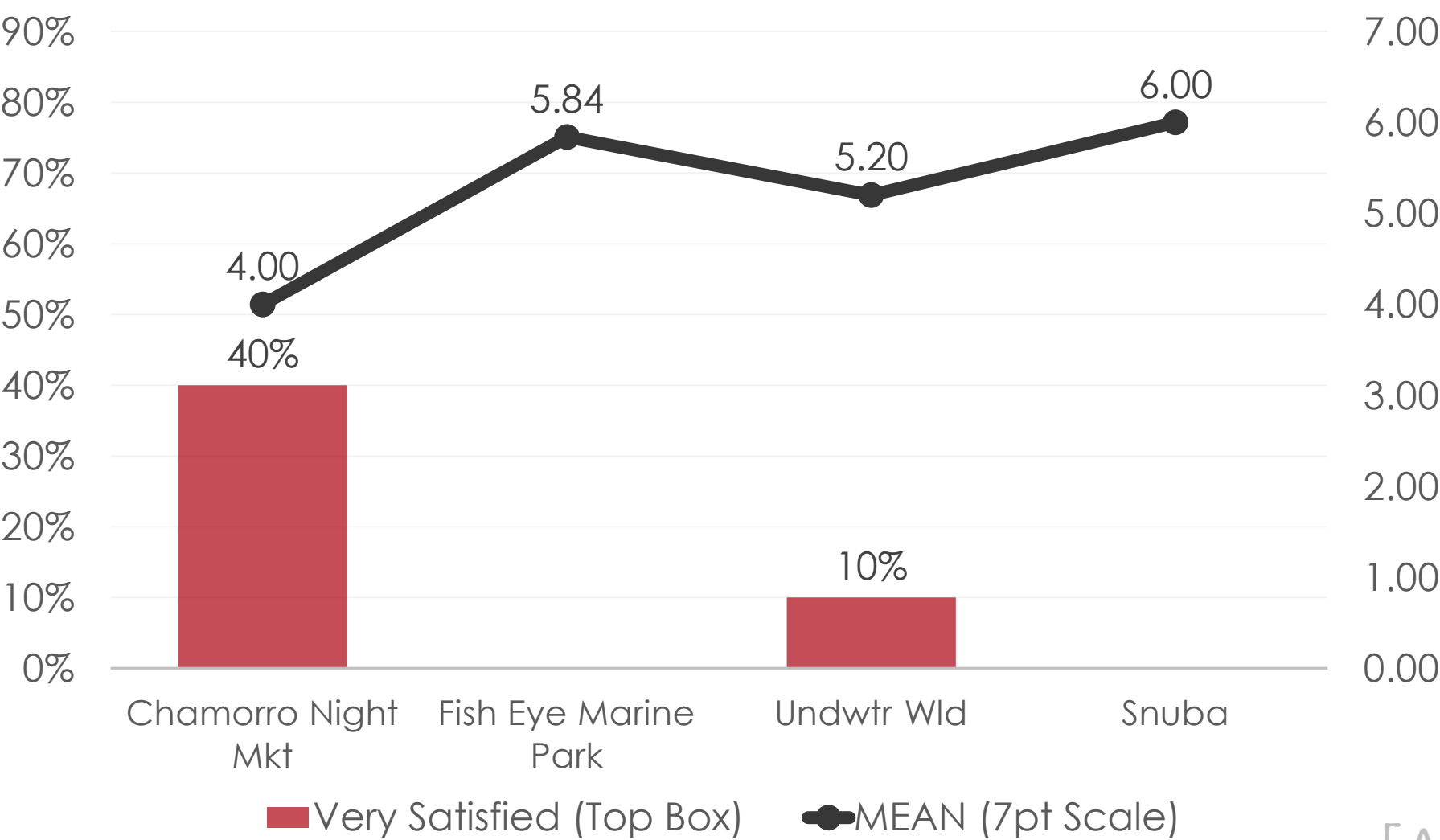


Optional Tour Participation (Top Responses/ 5%+)

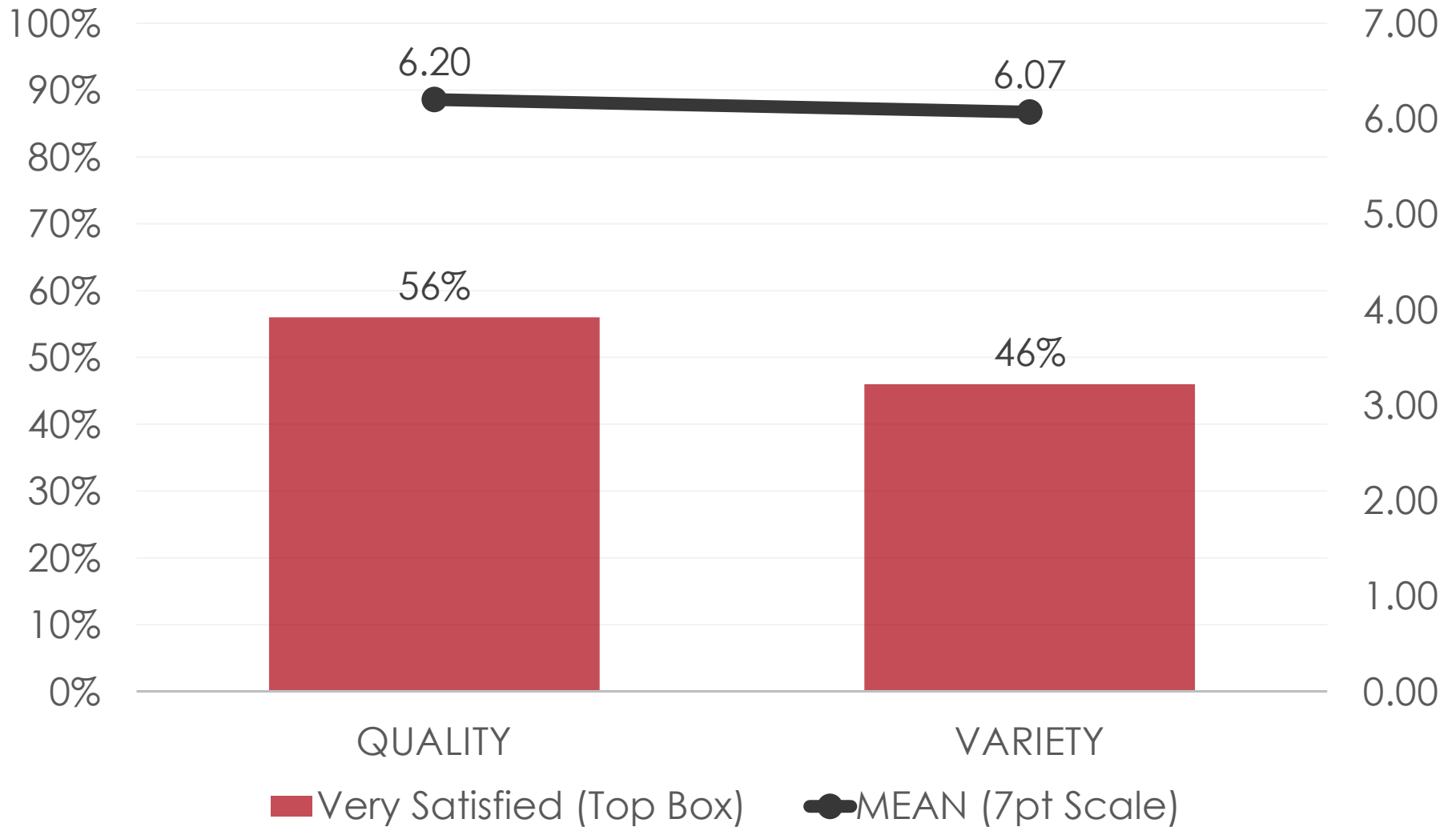


Optional Tour Satisfaction

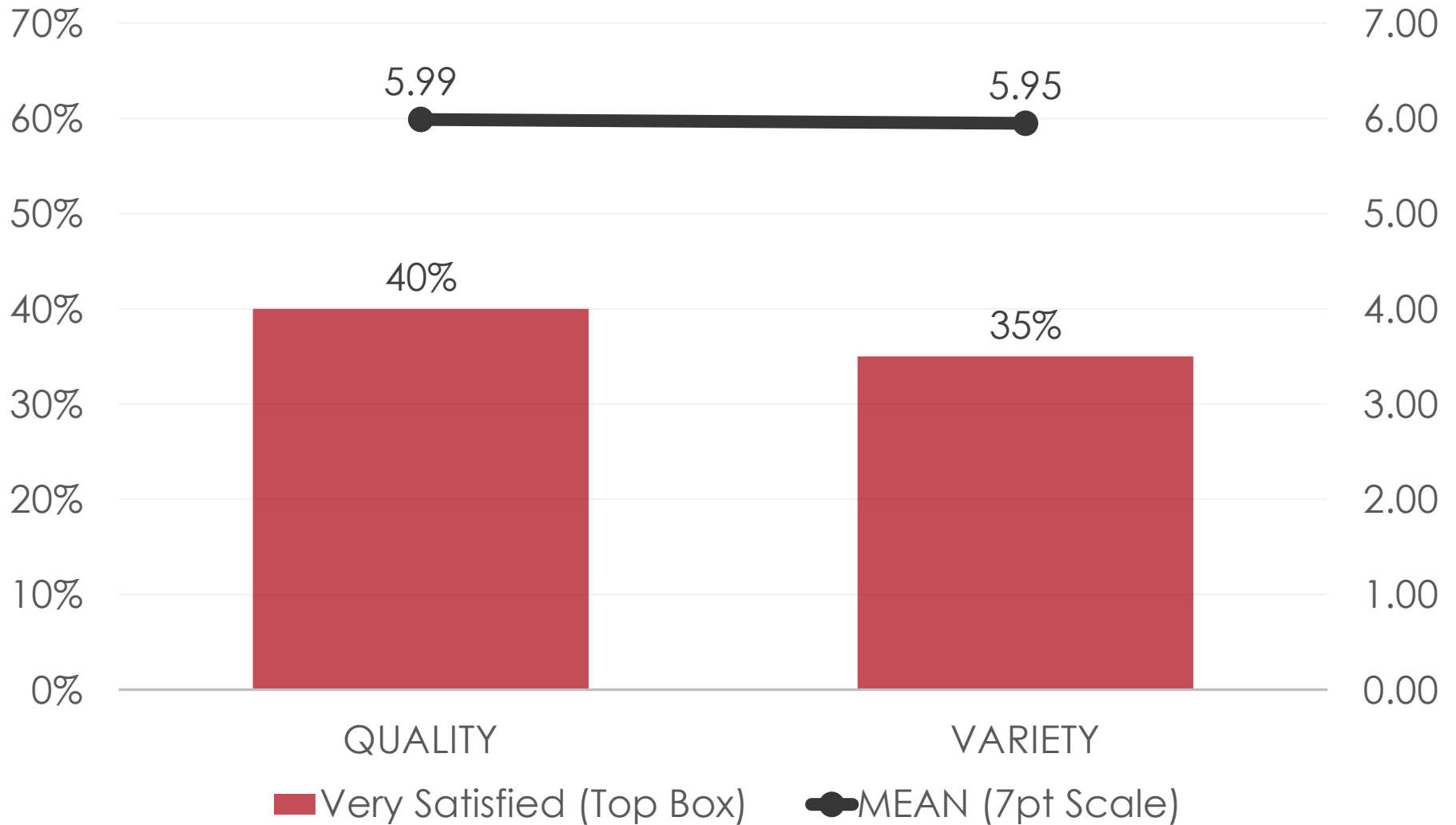
Top Responses only - Participation (5%+)



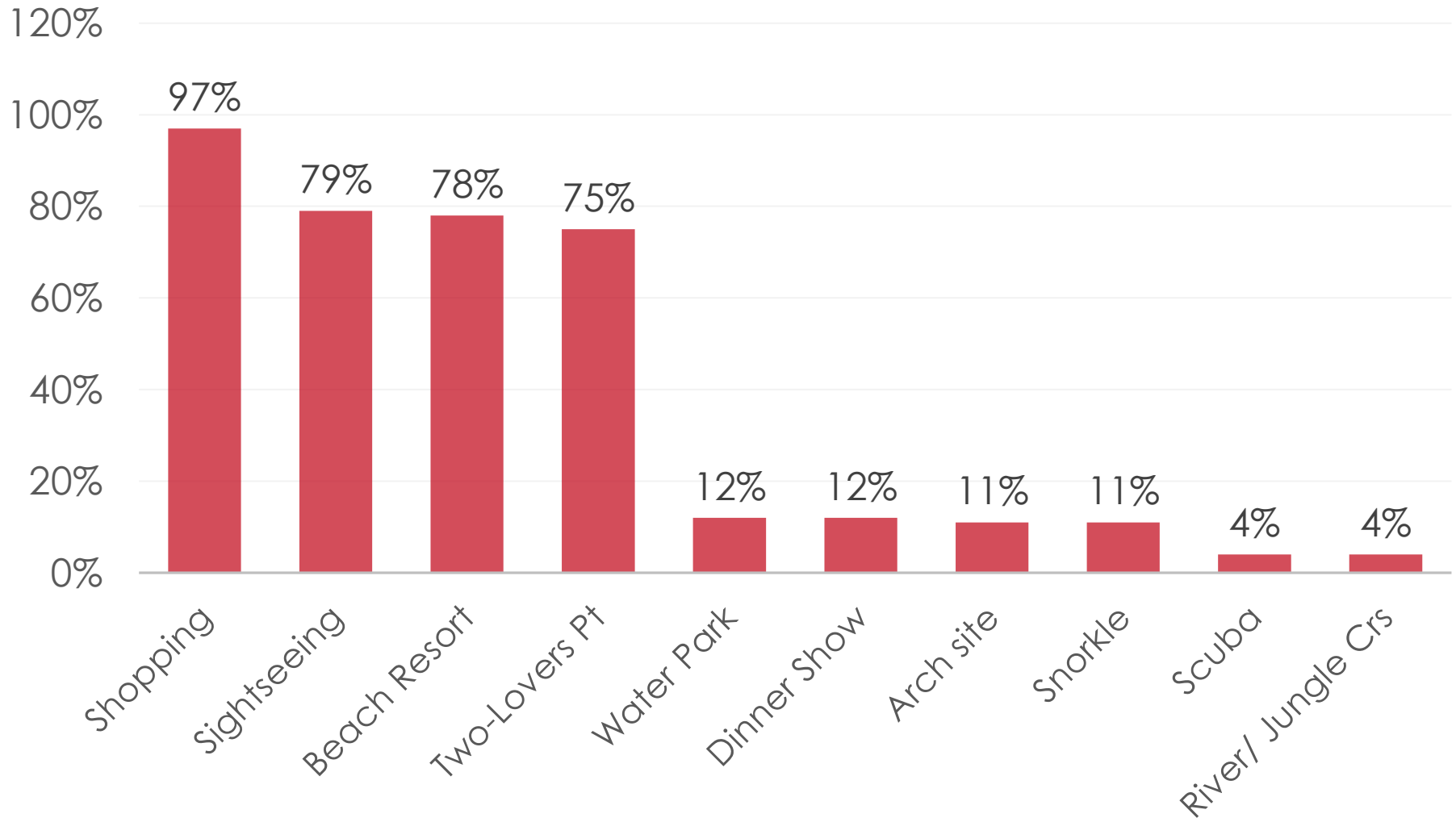
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION



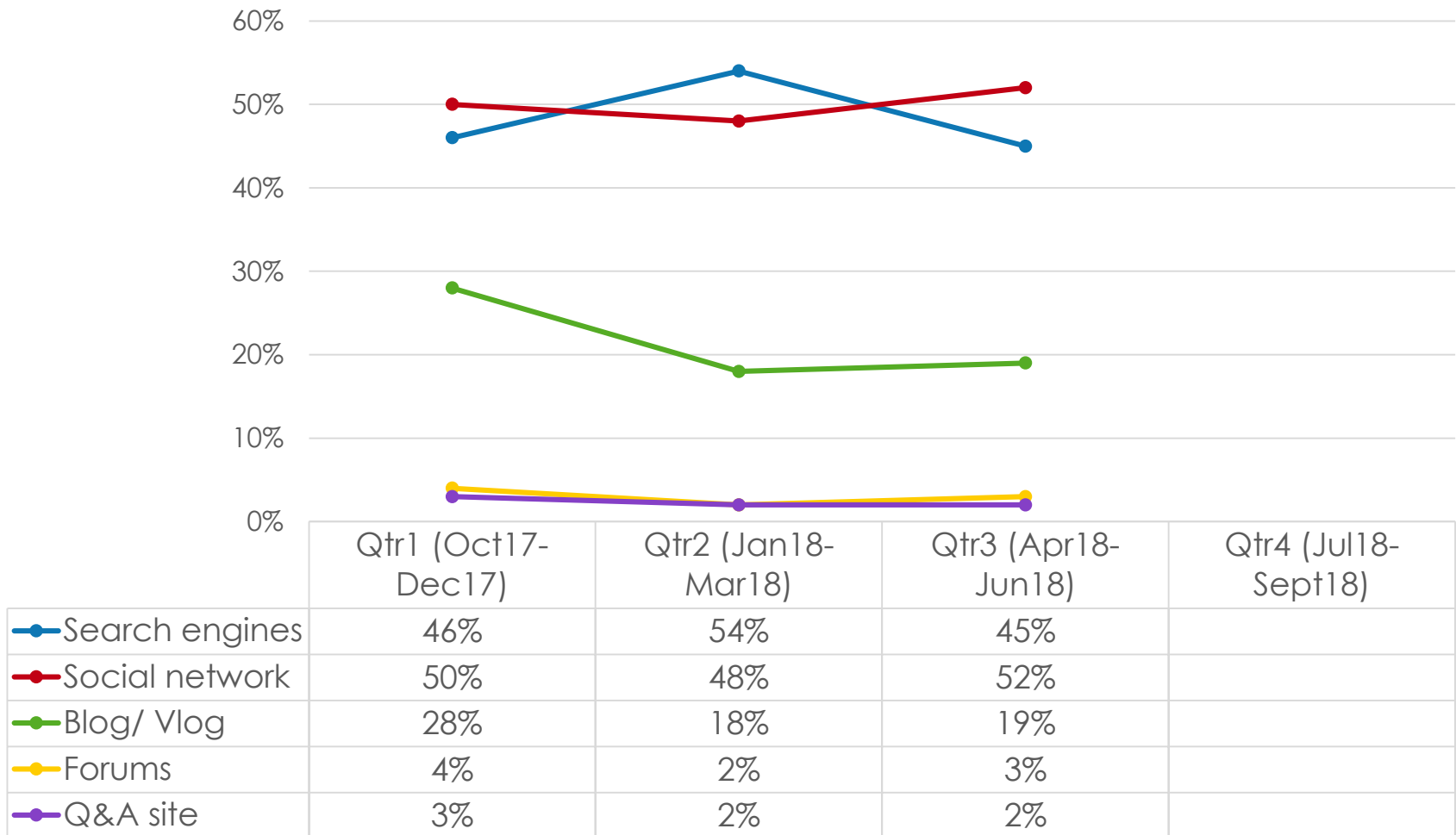
Activities Participation (Top Responses)



SECTION 5

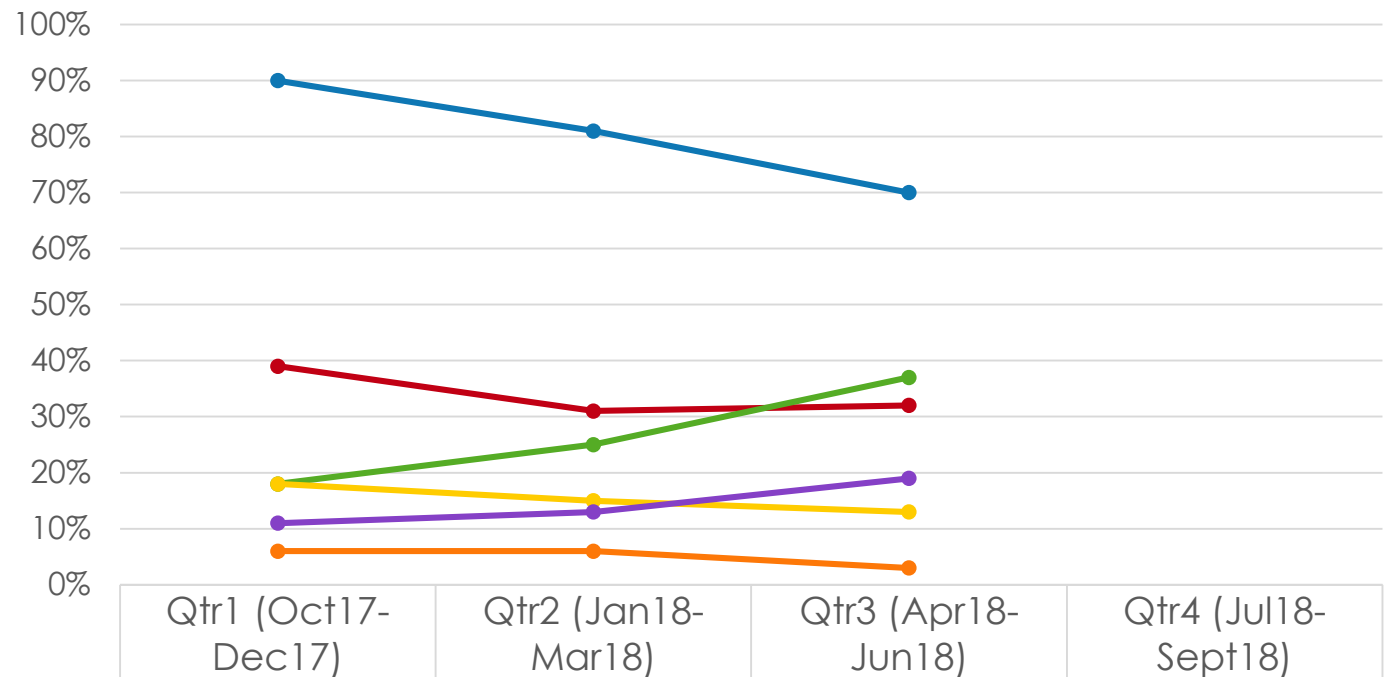
PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



INTERNET- SOURCES OF INFORMATION

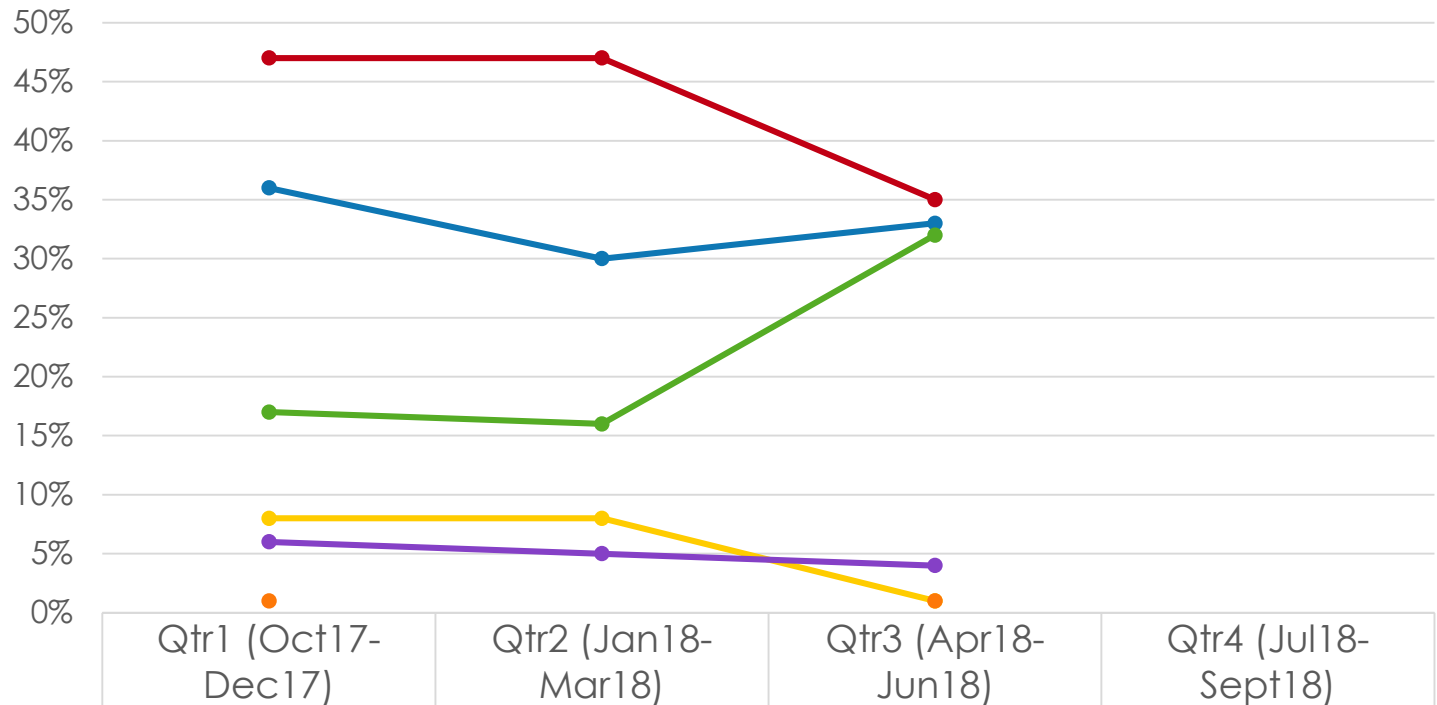
Things to do on Guam



Google	90%	81%	70%	
Facebook	39%	31%	32%	
Instagram	18%	25%	37%	
Online booking site	18%	15%	13%	
Yahoo	11%	13%	19%	
Twitter	6%	6%	3%	

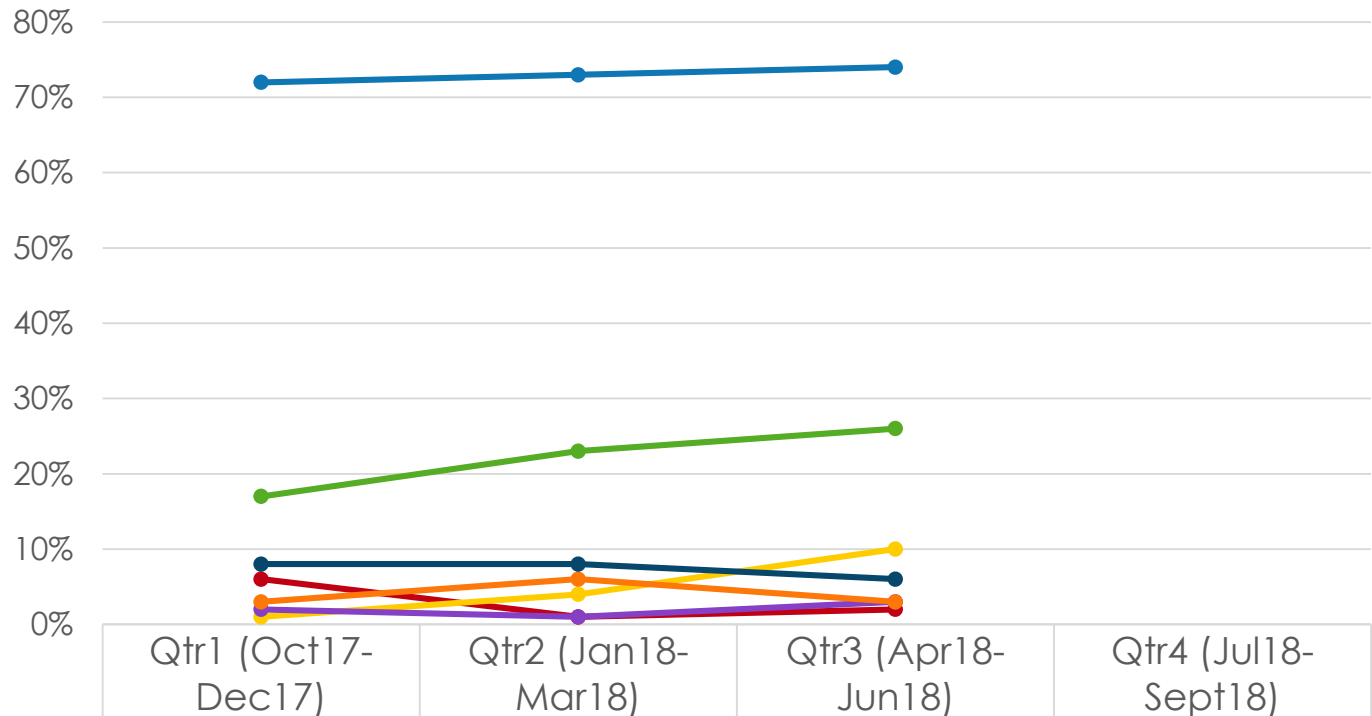
INTERNET- SOURCES OF INFORMATION

GVB



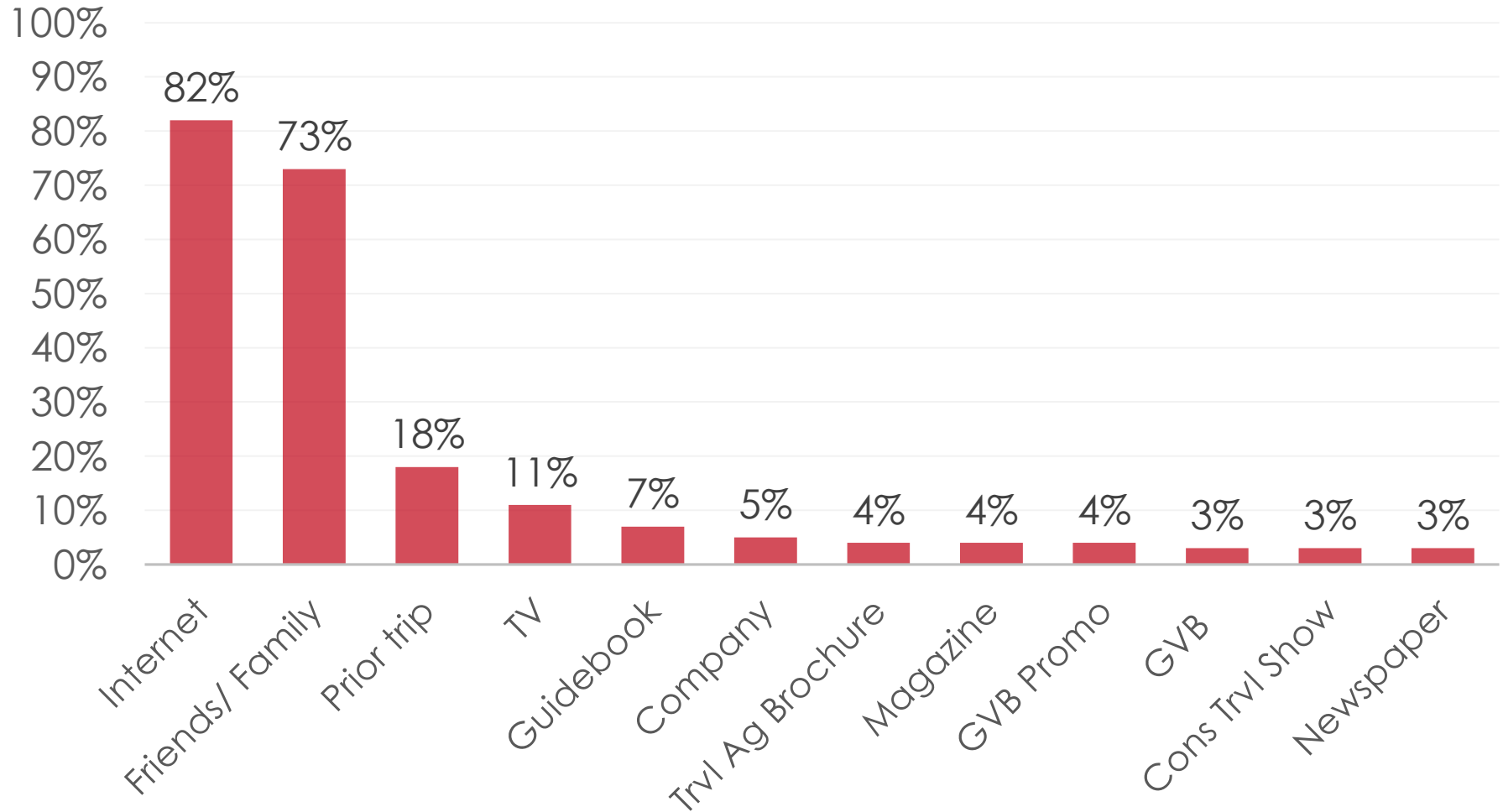
None	36%	30%	33%	
GVB Website	47%	47%	35%	
GVB Facebook	17%	16%	32%	
GVB Instagram	8%	8%	1%	
GVB Twitter	6%	5%	4%	
GVB Café	1%		1%	

TRAVEL MOTIVATION



Friends/ Family	72%	73%	74%	
Company/ Bus Trip	6%	1%	2%	
Internet	17%	23%	26%	
Travel Show	1%	4%	10%	
Travel Agent	2%	1%	3%	
Print	3%	6%	3%	
Social Media	8%	8%	6%	

PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

GVB EXIT SURVEY

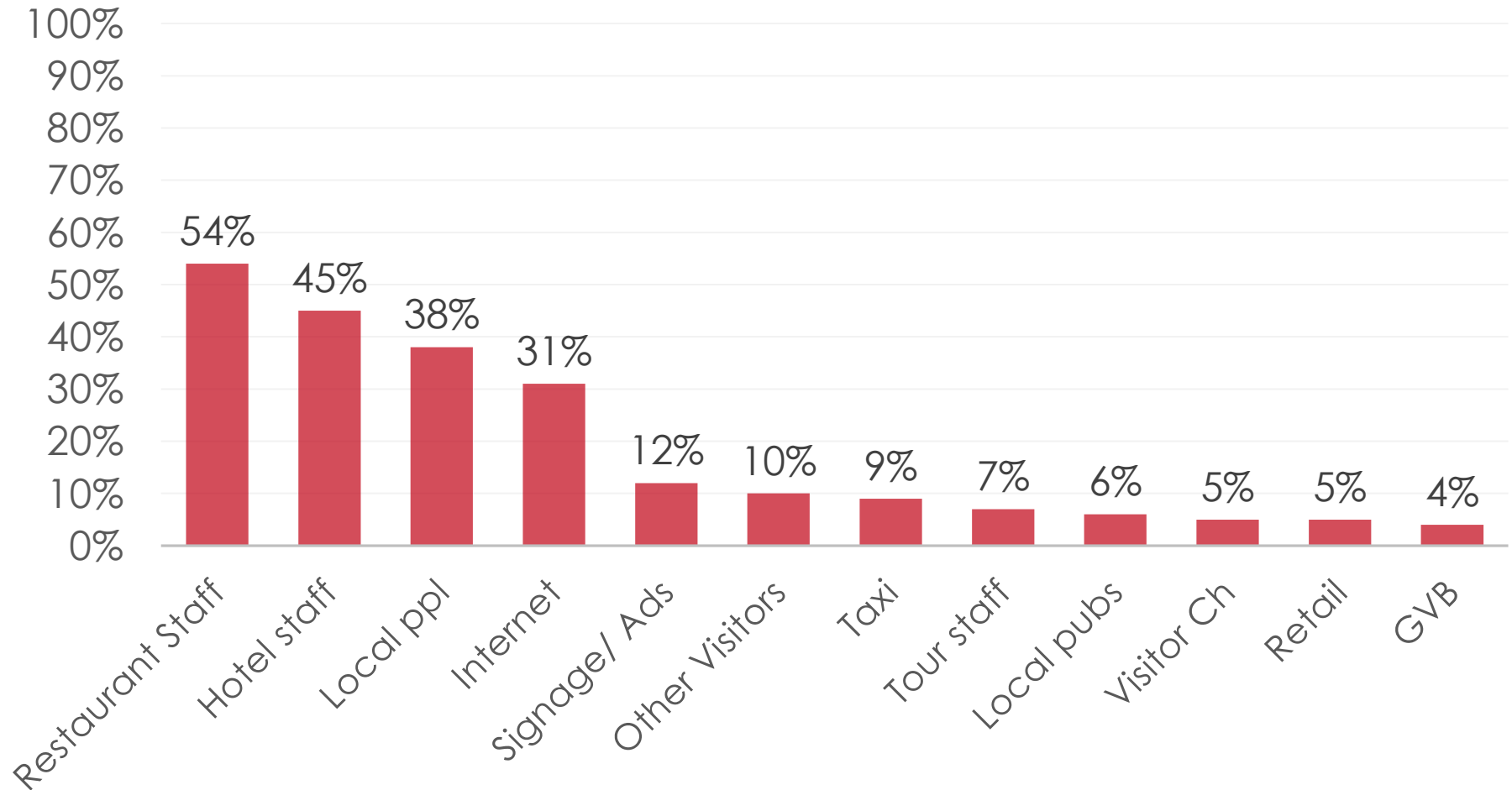
Q1 Please select the top three sources of information you used to find out about Guam before your trip:

	TOTAL	MICE	LEISURE	FIT	FAMILY
	-	-	-	-	-
Q1 Internet/Mobile App	82%	100%	89%	81%	85%
Friend or relative	73%	100%	70%	76%	66%
I have been to Guam before	18%	100%	19%	18%	19%
TV	11%		11%	11%	13%
Travel guide book at bookstores	7%		8%	7%	9%
Co-worker/ company travel department	5%		3%	6%	4%
Magazine (consumer)	4%		5%	2%	8%
Travel agent brochure	4%		5%	1%	4%
Guam Visitors Bureau promotional activities	4%		4%	4%	2%
Newspaper	3%		4%	2%	2%
Guam Visitors Bureau office	3%		4%	4%	4%
Consumer travel shows	3%		4%	4%	4%
Travel trade shows	2%		3%	2%	
Total	102	1	74	84	53

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:

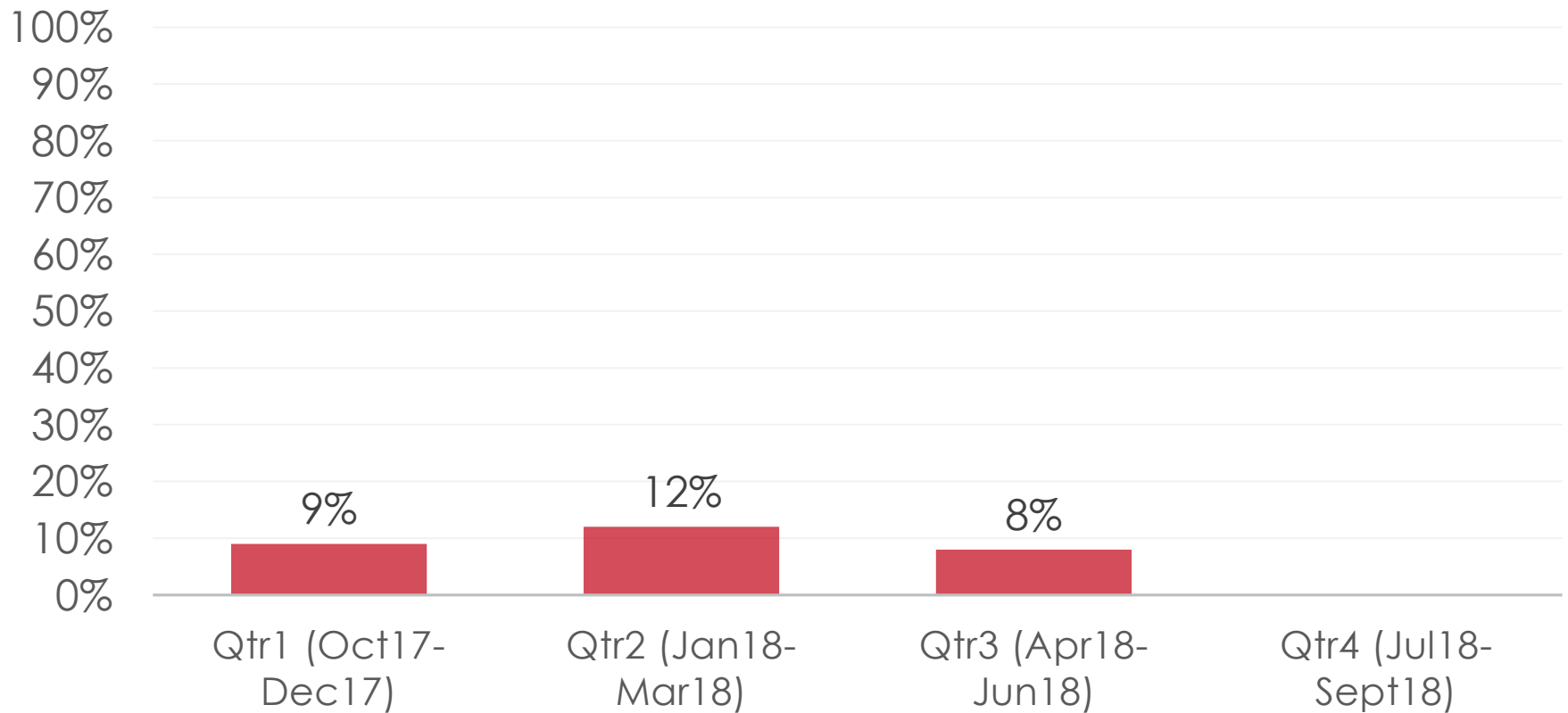
		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q2	Restaurant staff (outside hotel)	54%		55%	53%	45%
	Hotel staff	45%	100%	48%	39%	51%
	Local people	38%	100%	41%	42%	42%
	Internet/Mobile App	31%	100%	34%	34%	30%
	Signs/ advertisement	12%		12%	12%	15%
	Other visitors	10%		11%	10%	13%
	Taxi drivers	9%		10%	10%	17%
	Tour staff	7%		8%	7%	6%
	Local publication	6%		5%	4%	8%
	Retail staff	5%		4%	5%	4%
	Visitors channel	5%		5%	5%	4%
	Guam Visitors Bureau	4%		5%	5%	4%
	Total	101	1	73	83	53

Prepared by Anthology Research

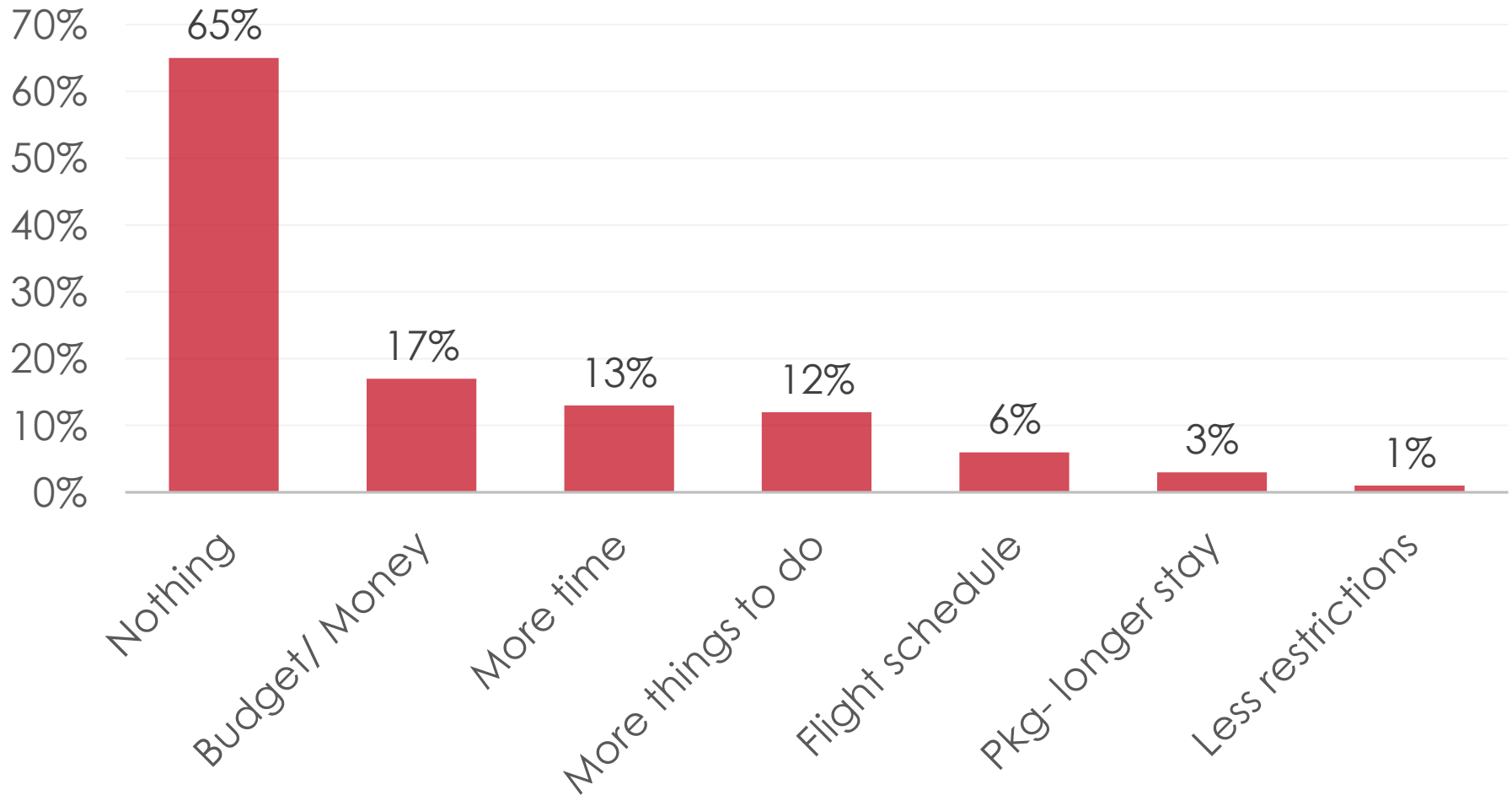
SECTION 6

FUTURE TRAVEL TO GUAM

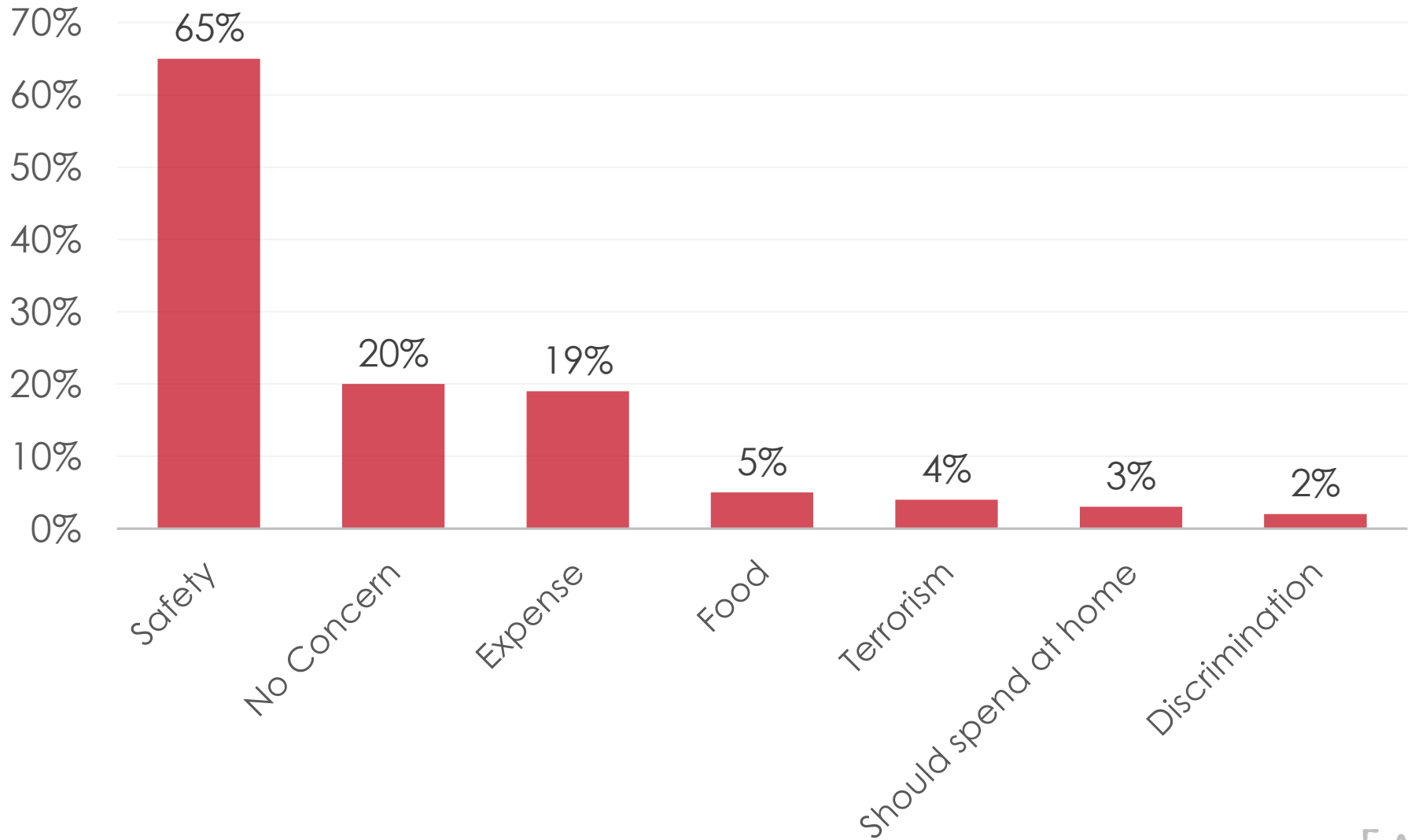
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



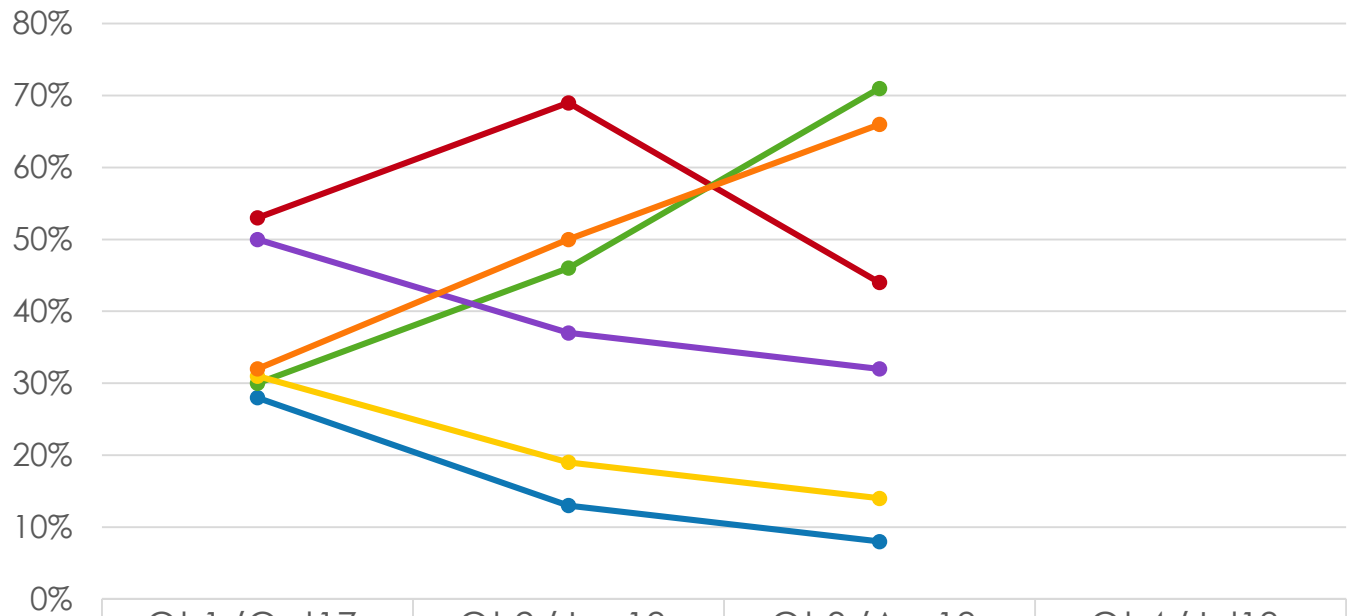
FUTURE TRAVEL CONCERNS



SECTION 7

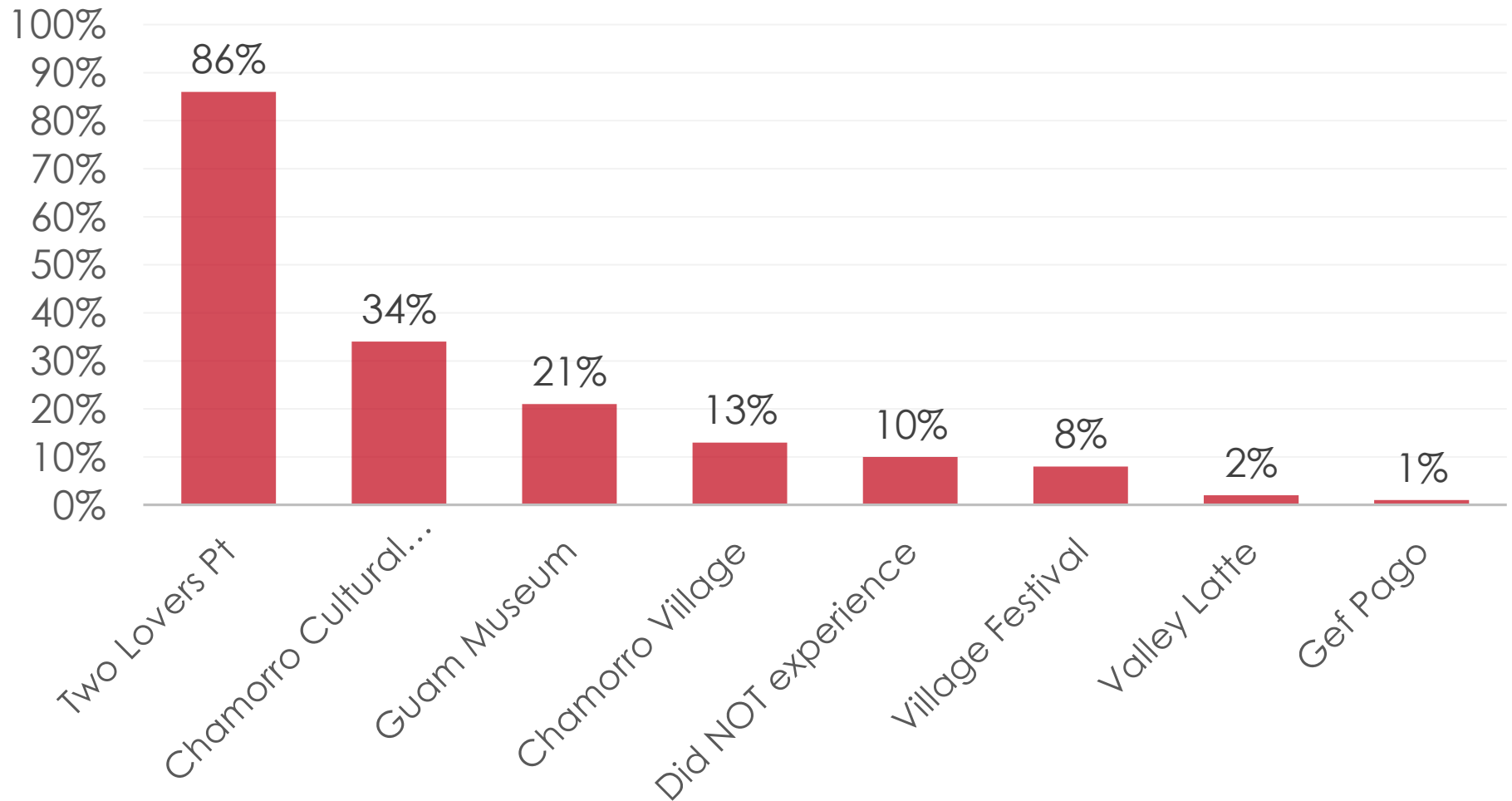
GUAM CULTURE

EXPERIENCED- CHAMORRO/ HAFA ADAI SPIRIT

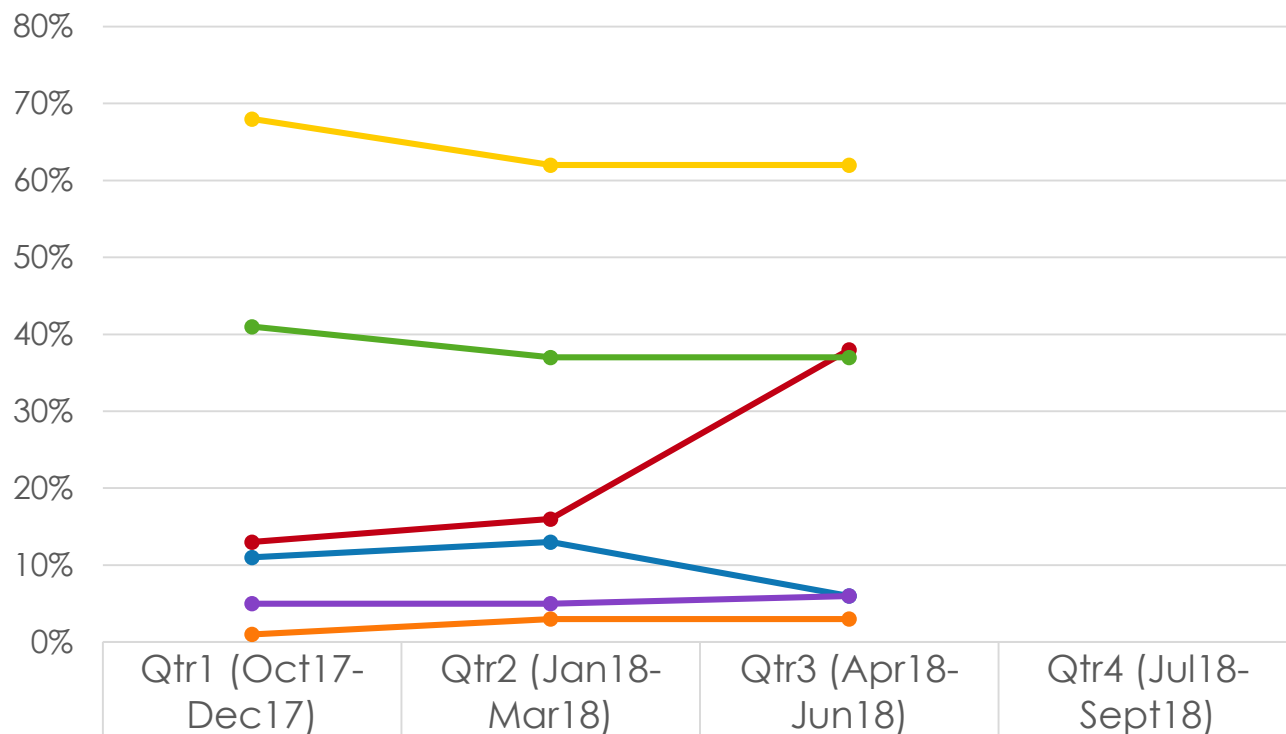


	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sep18)
Did NOT experience	28%	13%	8%	
Beaches	53%	69%	44%	
Chamorro cuisine	30%	46%	71%	
Night Market	31%	19%	14%	
Socializing- locals	50%	37%	32%	
Local Music	32%	50%	66%	

EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS

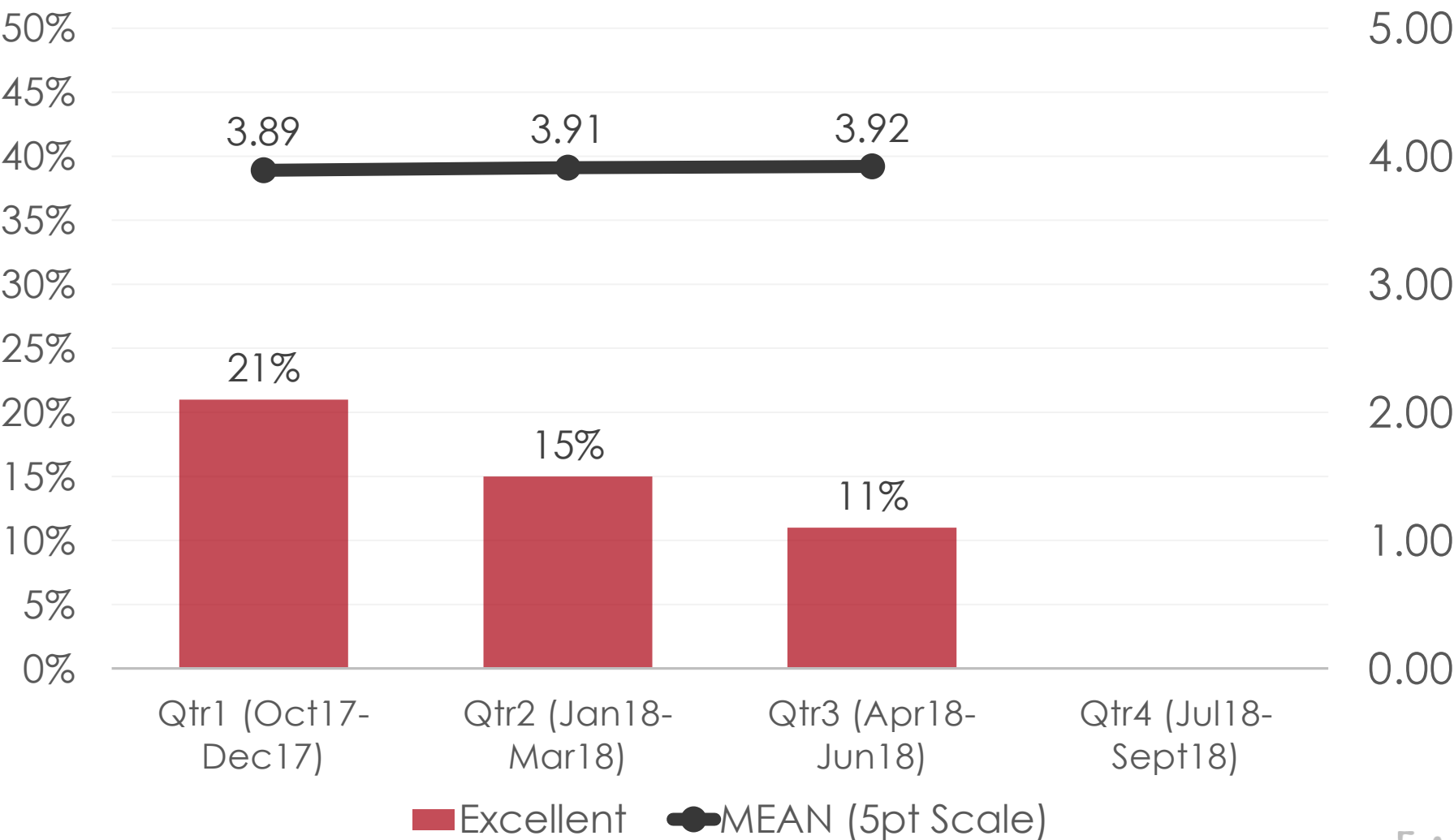


SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS

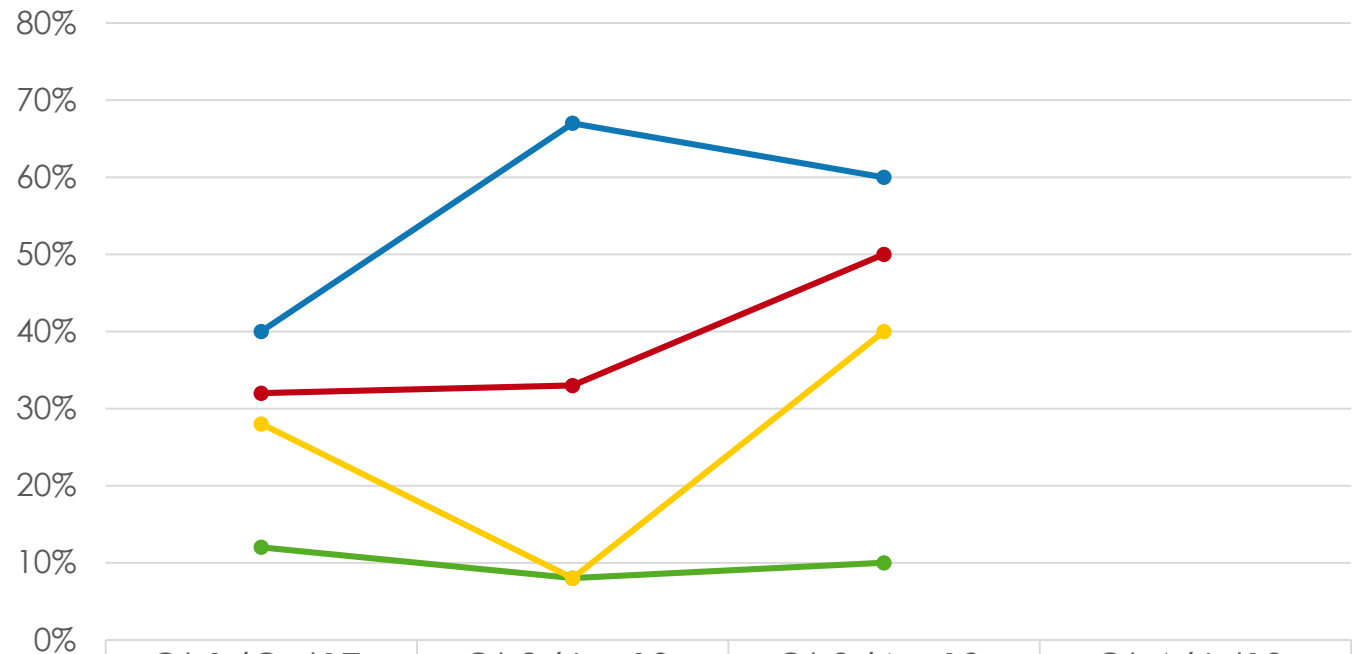


	Qtr1 (Oct17-Dec17)	Qtr2 (Jan18-Mar18)	Qtr3 (Apr18-Jun18)	Qtr4 (Jul18-Sep18)
Travel guide/ brochure	11%	13%	6%	
Travel agency	13%	16%	38%	
Internet	41%	37%	37%	
Family/ Friends	68%	62%	62%	
Hotel staff	5%	5%	6%	
Print	1%	3%	3%	

SATISFACTION- CULTURAL ACTIVITY/EVENTS



OBSTACLES- CULTURAL ACTIVITY/EVENTS



—●— Schedule	40%	67%	60%	
—●— Unaware	32%	33%	50%	
—●— Did not want to	12%	8%	10%	
—●— Did not know where	28%	8%	40%	

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 2018 and Overall 2018				
	1st Qtr. 2018	2nd Qtr 2018	3rd Qtr. 2018	1-3 Qtr Overall 2018
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks				
Ease of getting around		3		
Safety walking around at night	2			
Quality of daytime tours				
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping	3			
Variety of shopping				
Price of things on Guam		2	2	2
Quality of hotel accommodations			1	
Quality/cleanliness of air, sky				
Quality/cleanliness of parks	1			1
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	48.4%	71.9%	53.4%	74.9%

Drivers of Overall Satisfaction

- **Overall satisfaction** with Filipino visitor's experience on Guam is driven by two significant factors in the 3rd Quarter FY2018 Period. By rank order they are:
 - **Quality of hotel accommodations, and**
 - **Price of things in Guam.**
- With these factors the overall r^2 is .534 meaning that **53.4% 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. 2018 and Overall 2018				
	1st Qtr 2018	2nd Qtr 2018	3rd Qtr. 2018	1-3 Qtr Overall 2018
Drivers:	rank	rank	rank	rank
Ease of getting around				
Safety walking around at night				
Quality of daytime tours				
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping				
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations				
Quality/cleanliness of air, sky				
Quality/cleanliness of parks				
Quality of landscape in Tumon		1		
Quality of landscape in Guam		2		
Quality of ground handler				
Quality/cleanliness of transportation vehicles				
% of Per Person On Island Expenditures Accounted For	0.0%	19.7%	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 factors in the 3rd Quarter FY2018 Period.