

Guam Visitors Bureau

Philippine Visitor Tracker Exit Profile & Market Segmentation Report

FY2019
QTR1 (OCT-DEC 2018)

Prepared by: Anthology Research

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#instaGuam



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 **104** 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 **104** is +/- 9.61 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 +/- 9.61 percentage points.

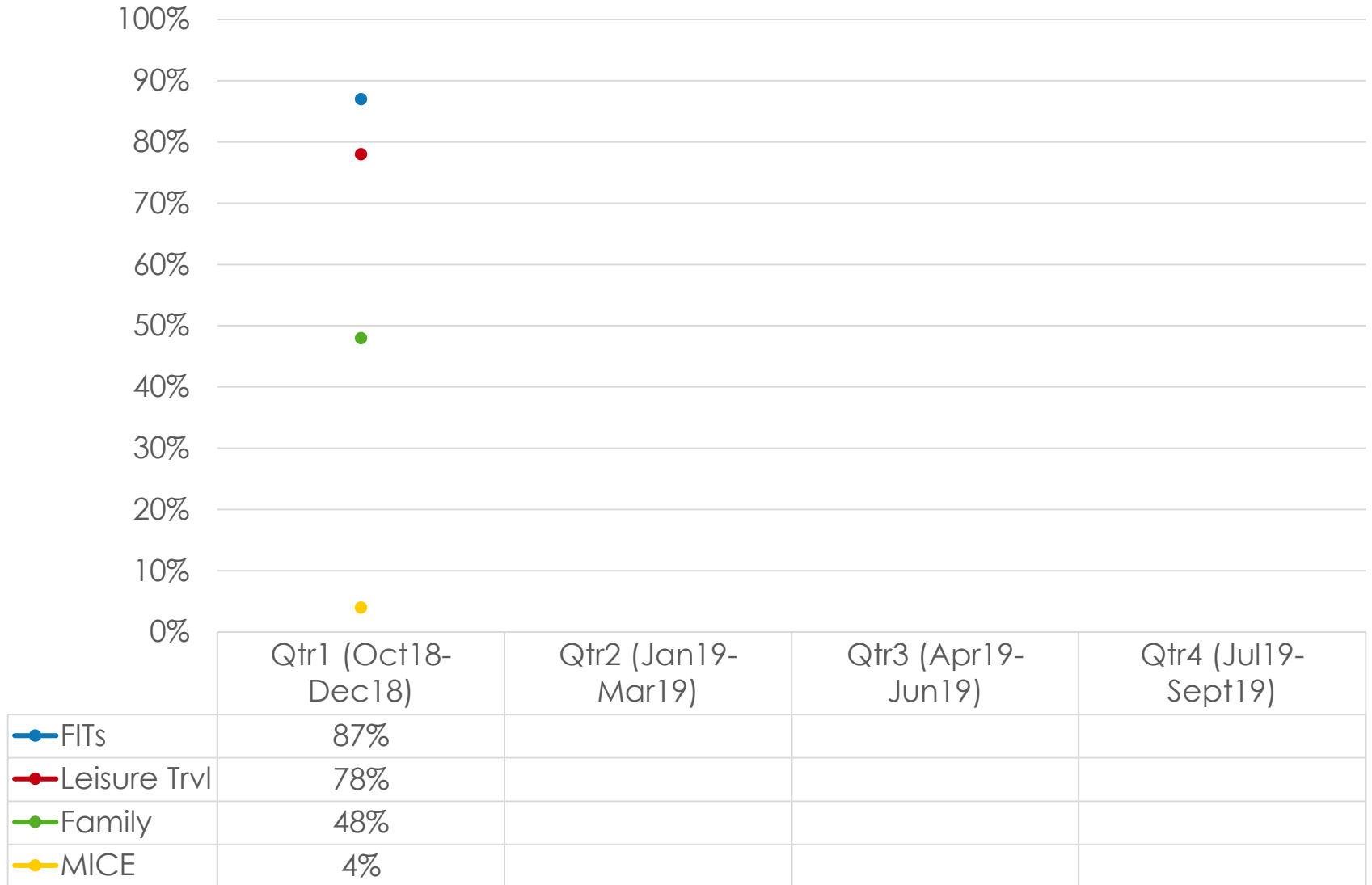
Objectives

- 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

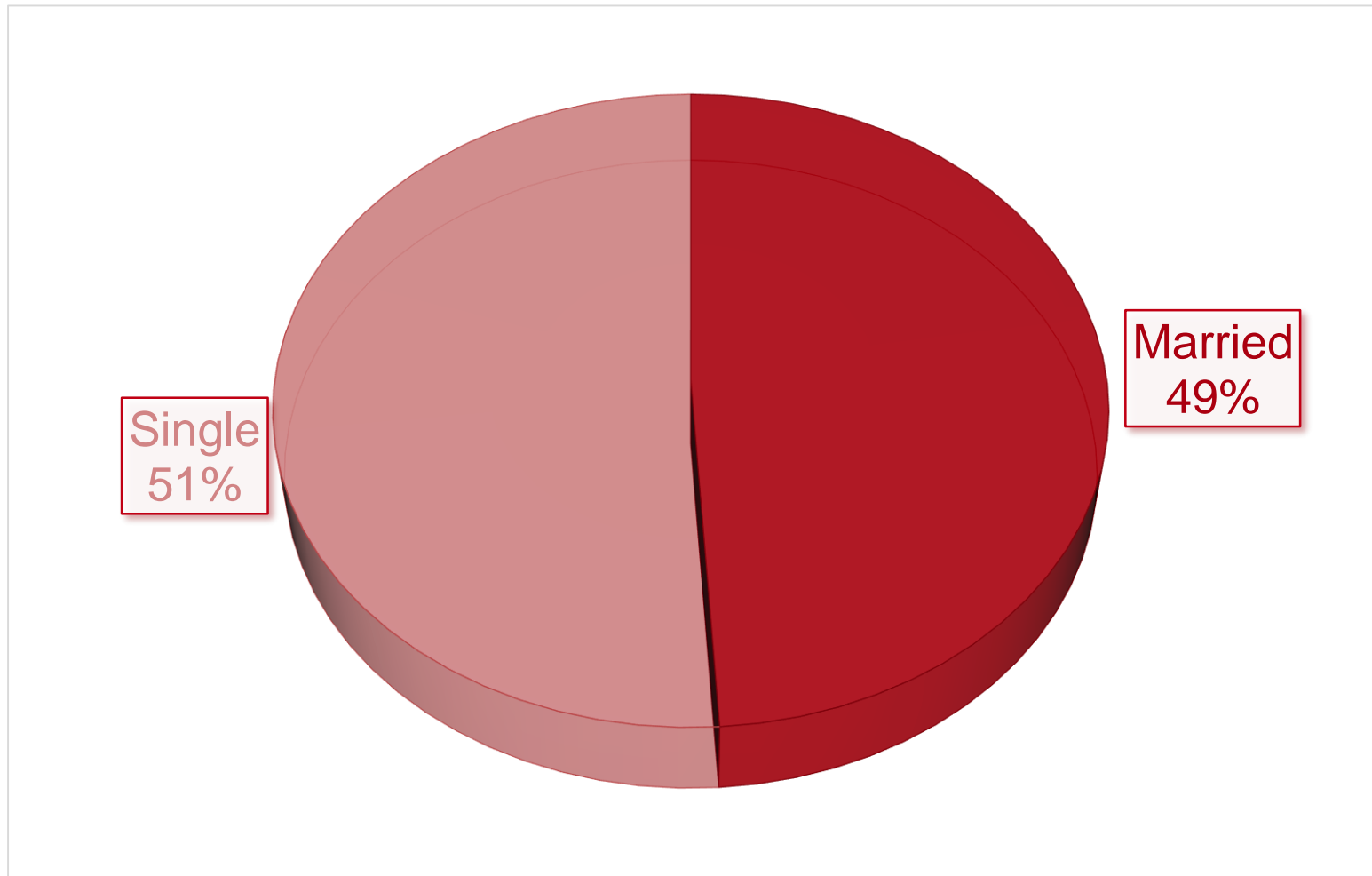
Key Highlighted Segments



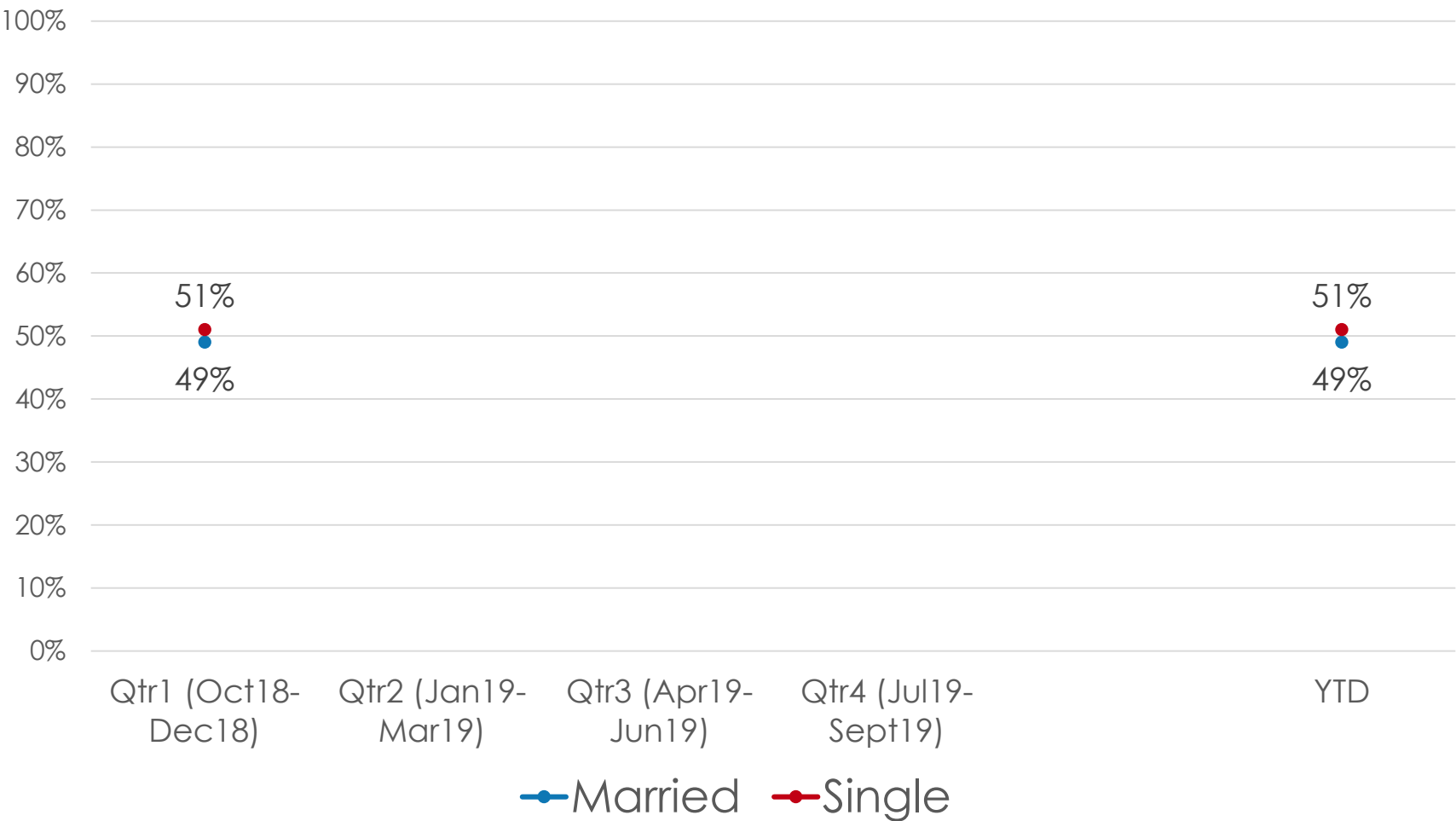
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2019 Tracking



Marital status – Key Segments

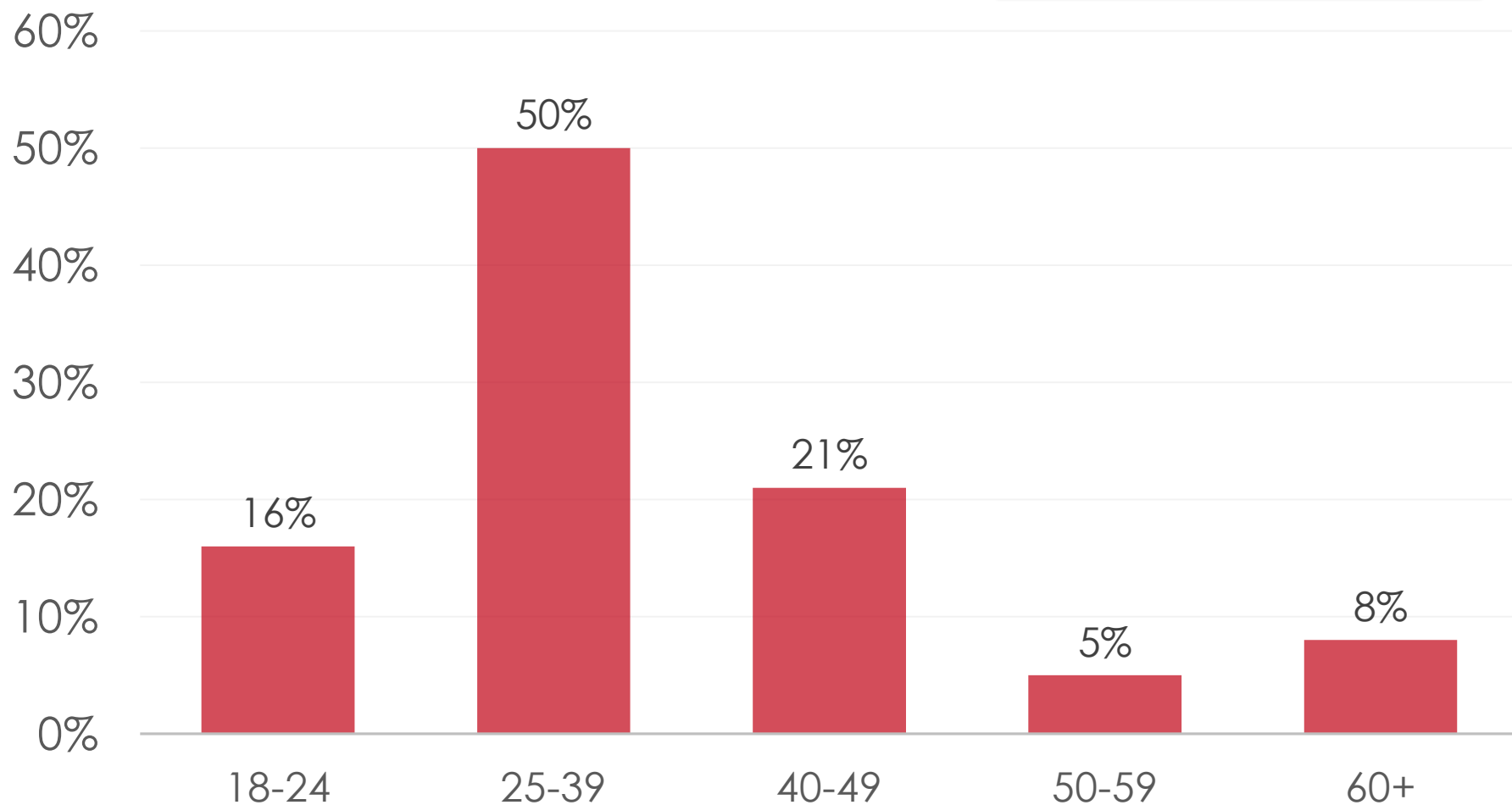
GVB EXIT SURVEY
QE MARITAL STATUS

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
QE	Married	49%	25%	49%	49%	68%
	Single	51%	75%	51%	51%	32%
	Total	104	4	81	90	50

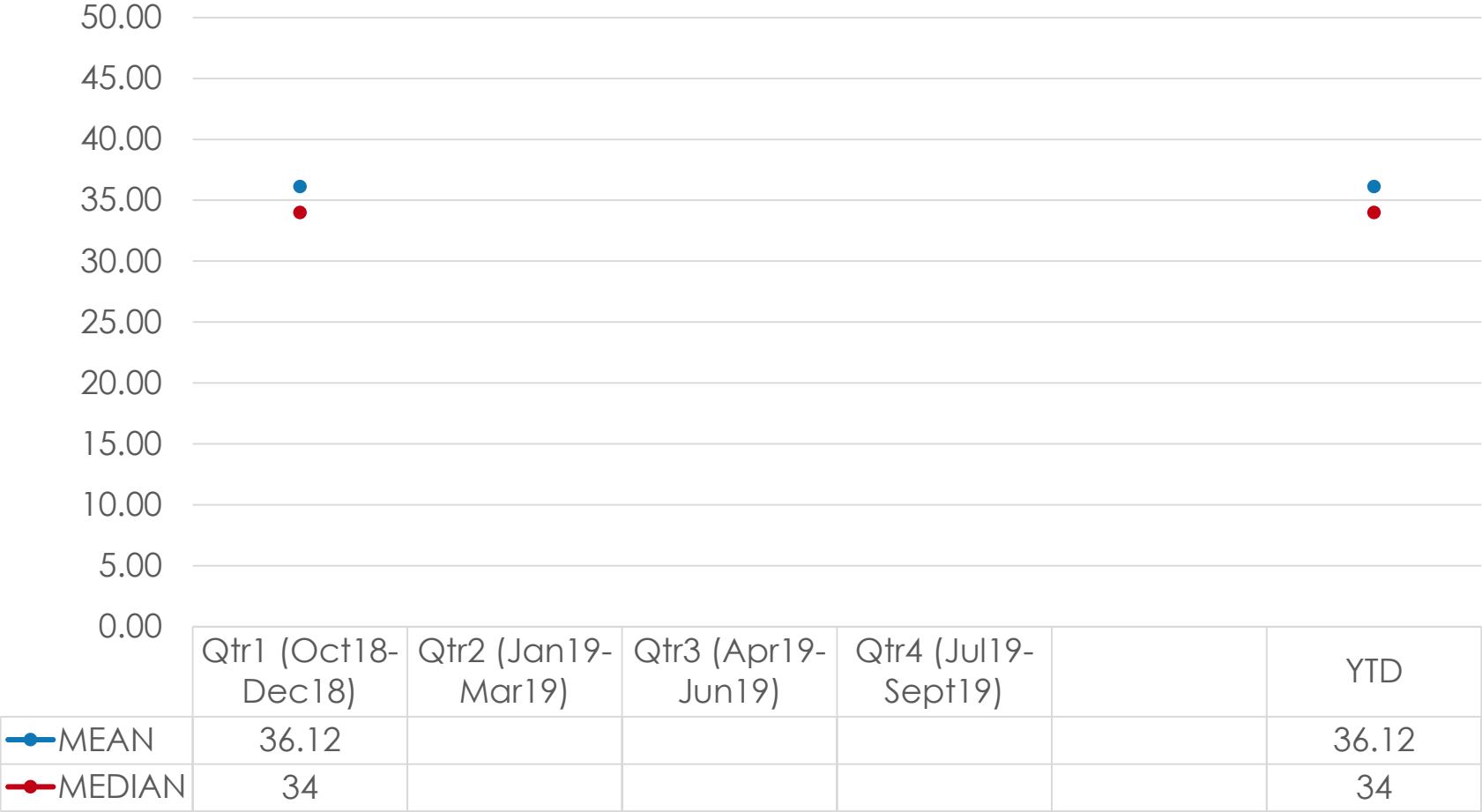
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Age

MEAN = 36.12
MEDIAN = 34



Age – FY2019 Tracking



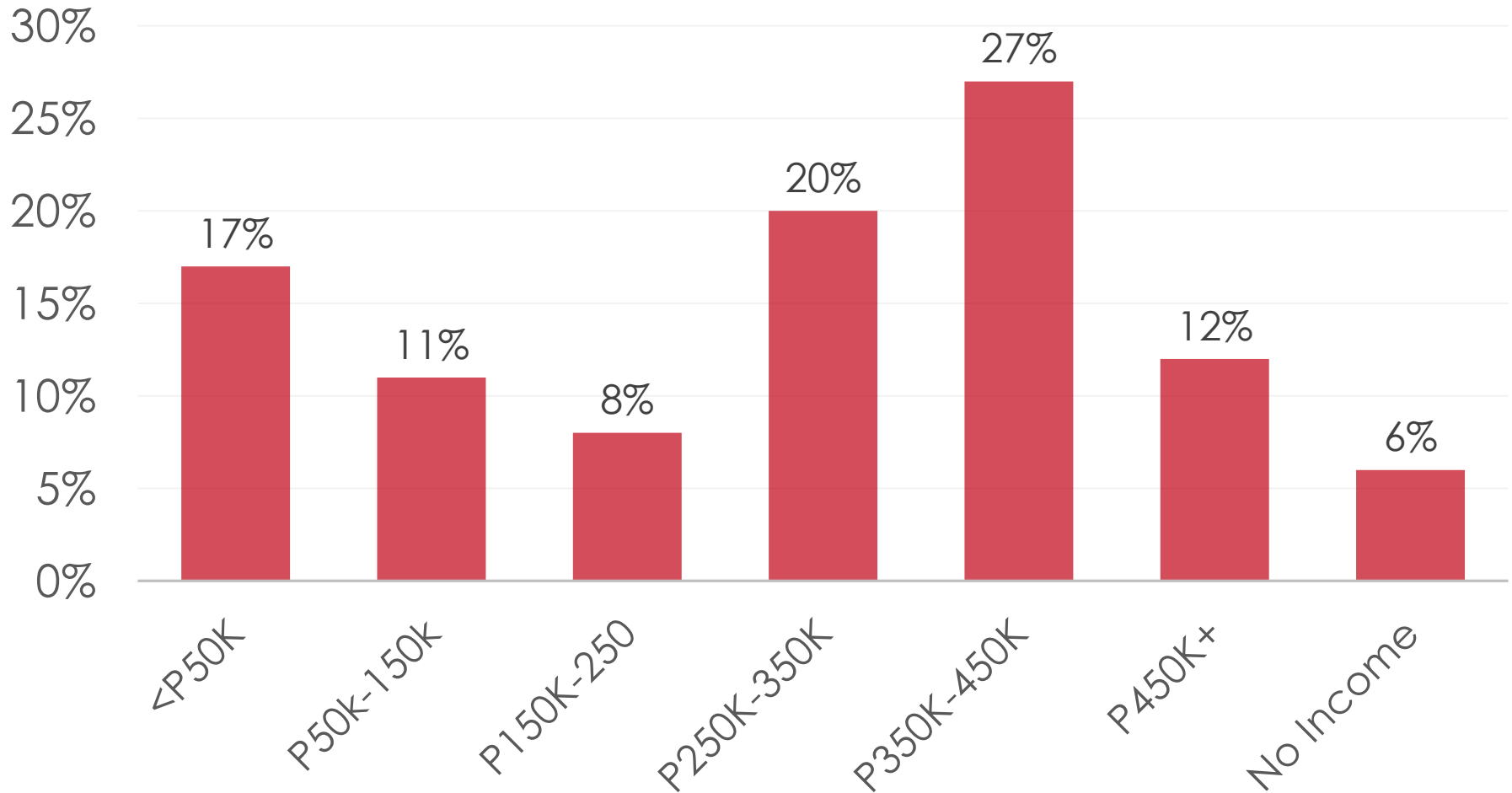
Age – Key Segments

**GVB EXIT SURVEY
AGE**

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
SD	18-24	16%	25%	15%	17%	16%
	25-39	50%	50%	58%	53%	50%
	40-49	21%	25%	19%	19%	28%
	50-59	5%		6%	3%	6%
	60+	8%		2%	8%	
	Total	104	4	81	90	50
SD	Mean	36.12	31.50	34.38	35.66	35.58
	Median	34.00	29.00	32.00	33.50	35.00

Prepared by Anthology Research

Annual Household Income



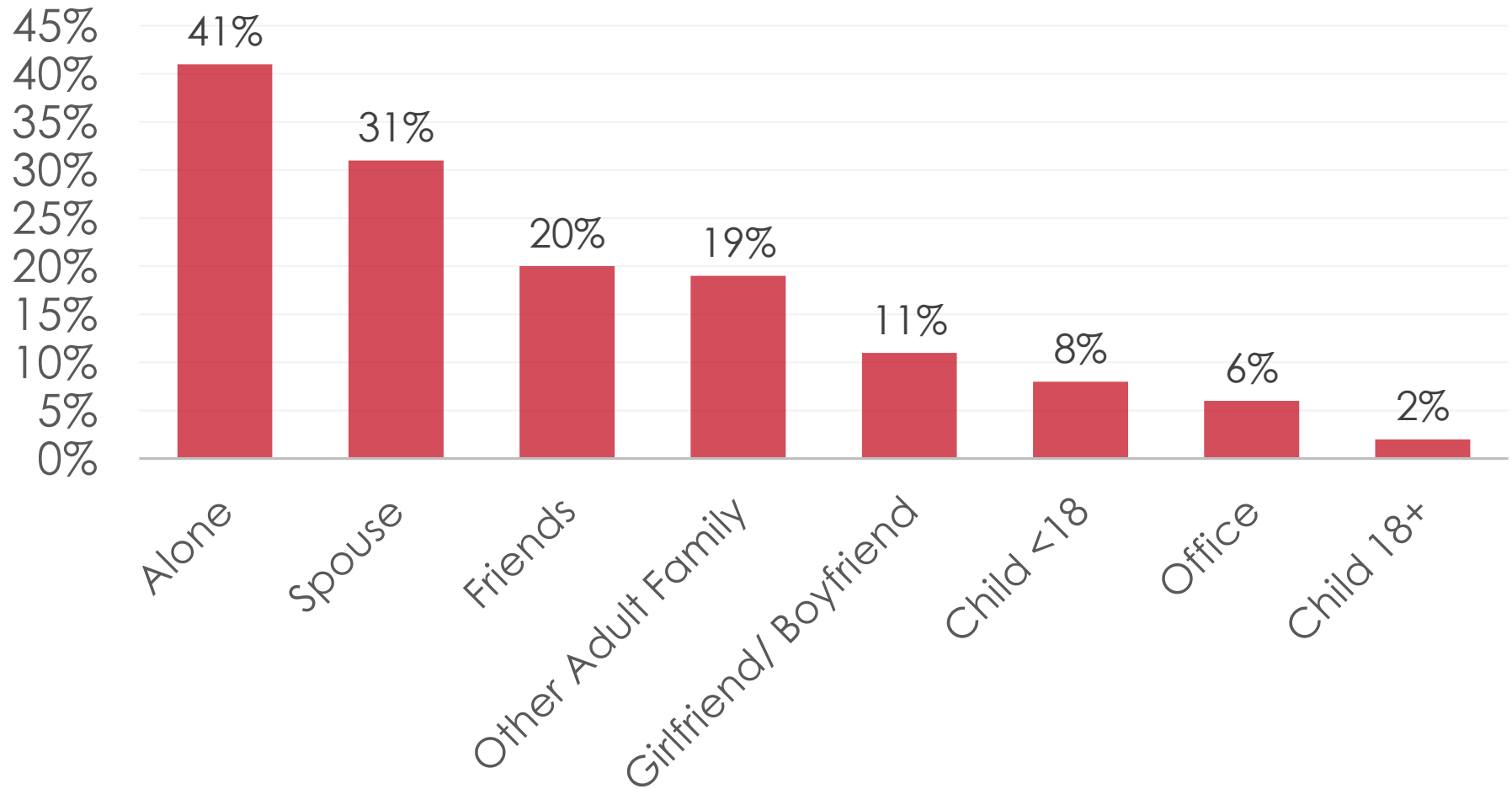
Annual Household Income – Key Segments

GVB EXIT SURVEY
Q26 Household income:

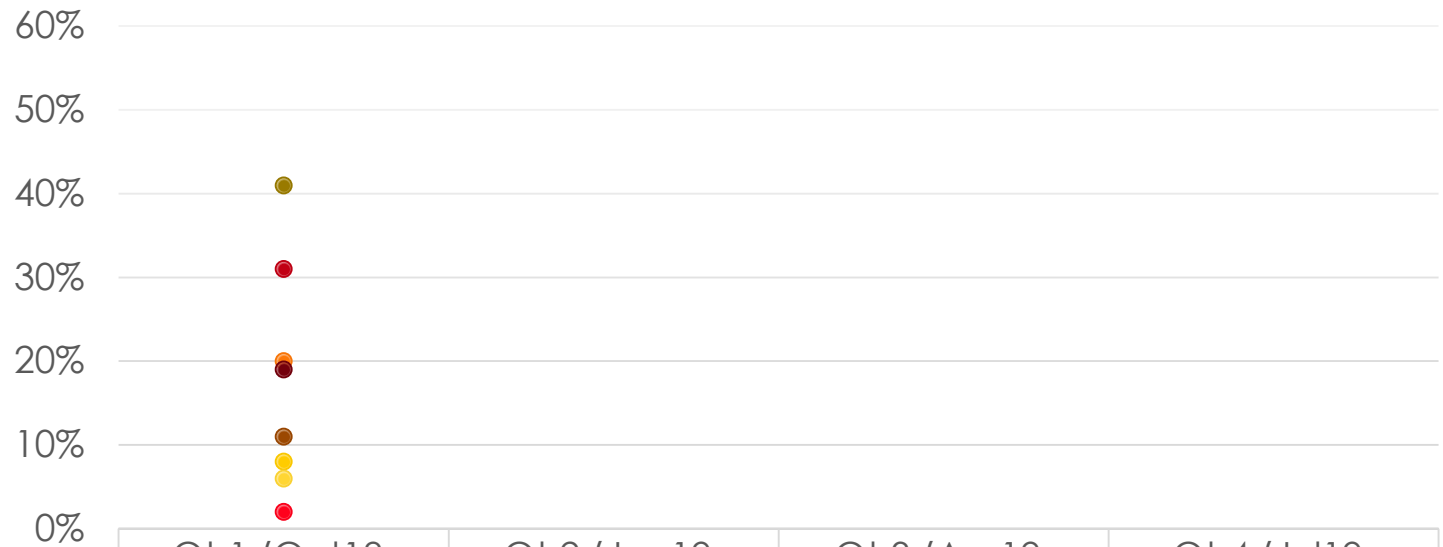
		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q26	Up to P50K	17%	50%	18%	16%	12%
	P50K-P150K	11%	25%	10%	11%	6%
	P150K-P250K	8%		8%	8%	12%
	P250K-P350K	20%	25%	20%	20%	18%
	P350K-P450K	27%		30%	25%	35%
	P450K+	12%		9%	14%	12%
	No Income	6%		5%	6%	4%
	Total	102	4	79	88	49

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Travel Party

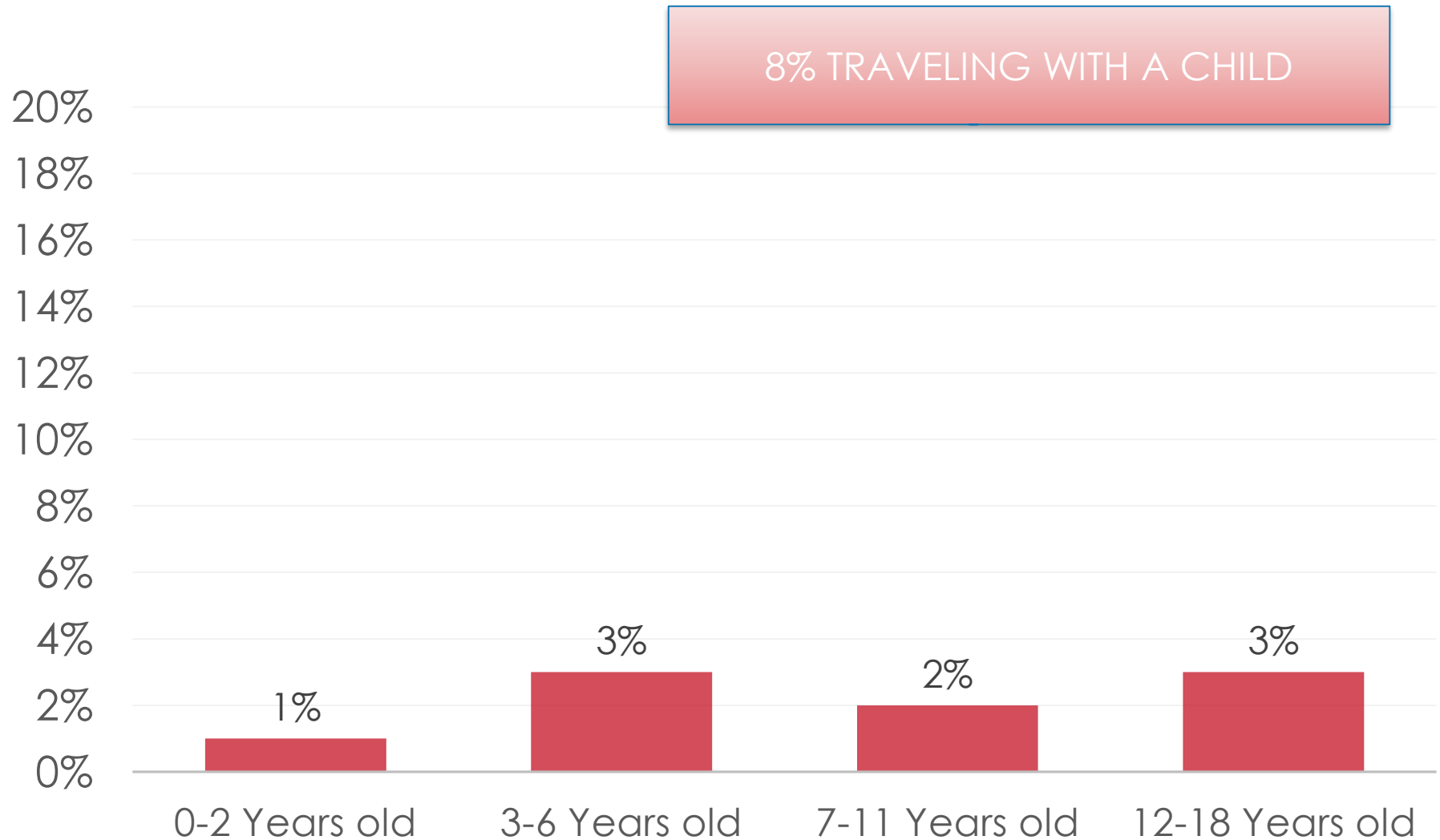


Travel Party

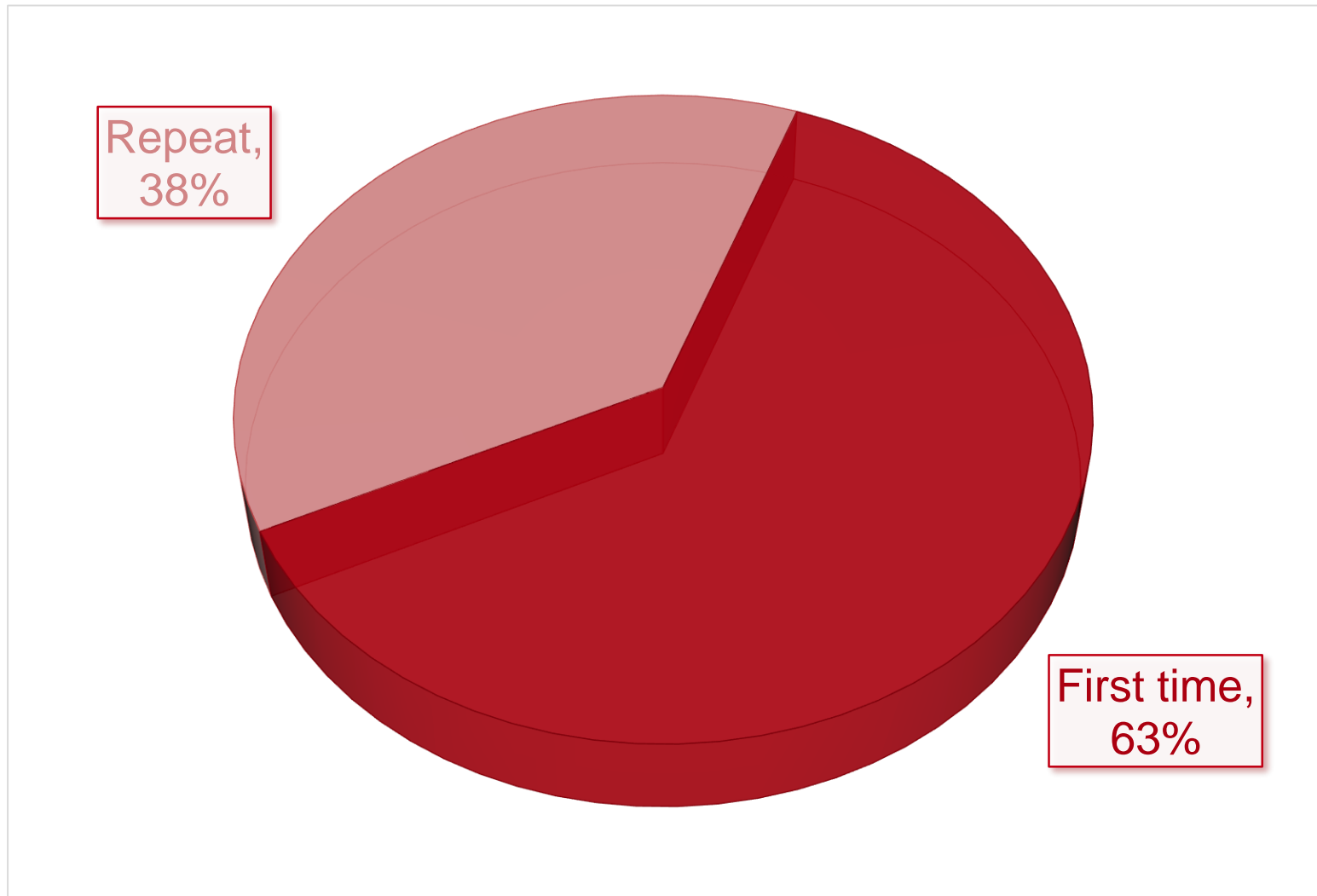


	Qtr1 (Oct18-Dec18)	Qtr2 (Jan19-Mar19)	Qtr3 (Apr19-Jun19)	Qtr4 (Jul19-Sept19)
Spouse	31%			
Child <18	8%			
Friend/ Assoc	20%			
Other Adult Family	19%			
Alone	41%			
Girlfriend/ Boyfriend	11%			
Child- Adult	2%			
Office	6%			

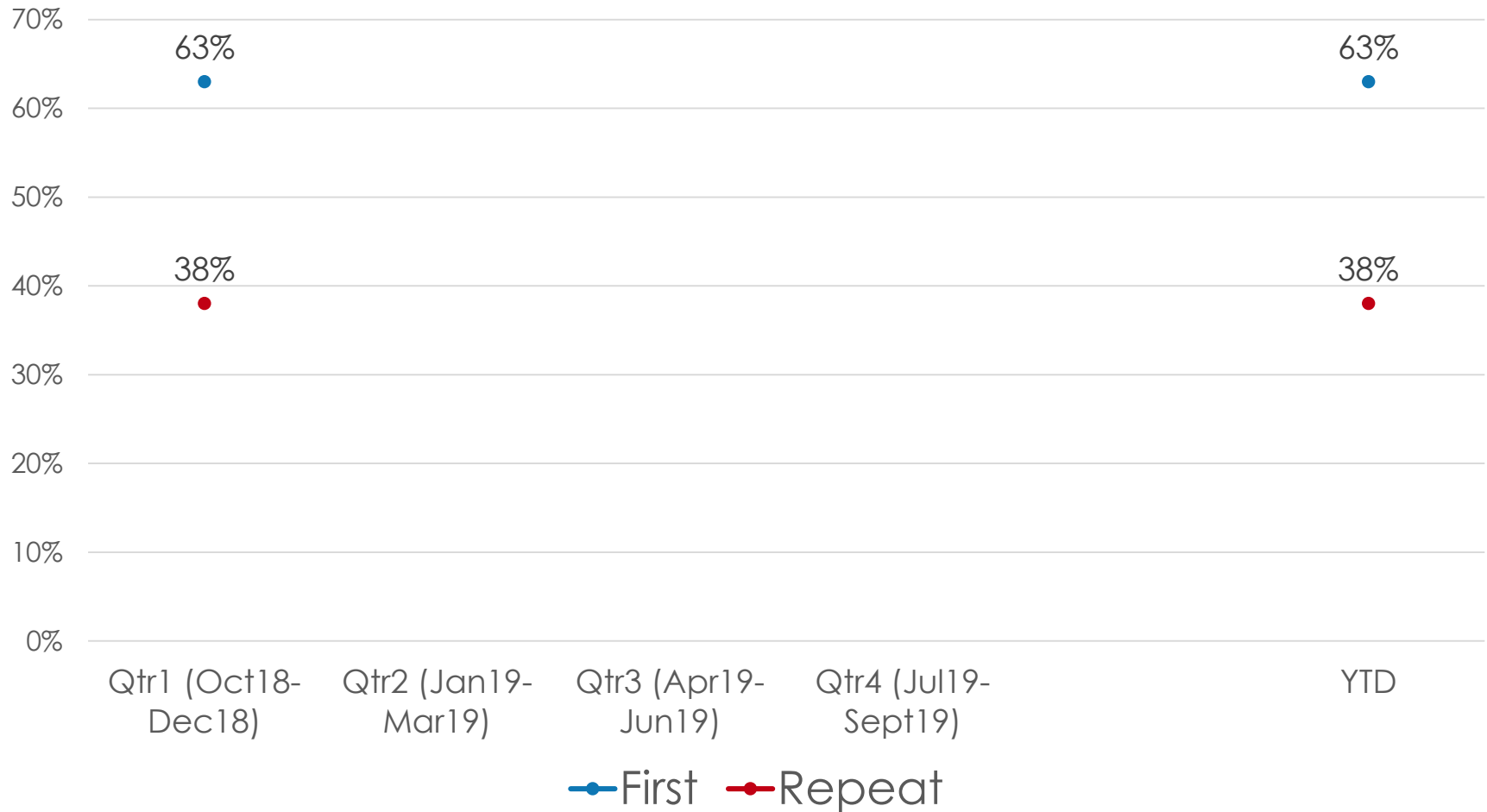
Travel Party - Children



Trips to Guam



Trips to Guam – FY2019 Tracking



Trips to Guam – Key Segments

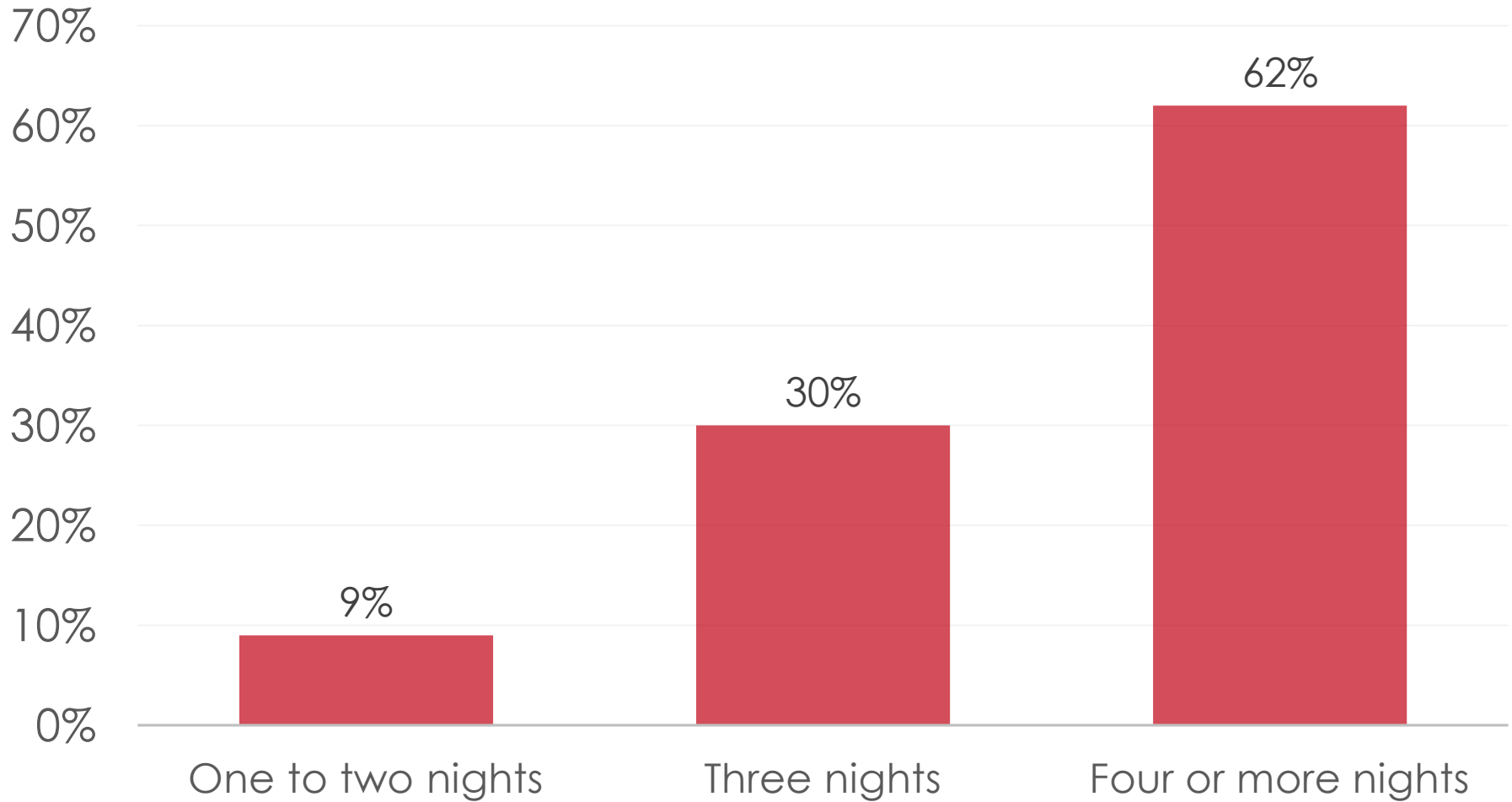
GVB EXIT SURVEY
Q3 Including this trip, how many times have you visited Guam?

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q3	1st Time	63%	100%	67%	60%	58%
	Repeat	38%		33%	40%	42%
	Total	104	4	81	90	50
Q3A	Mean	1.69	1.00	1.57	1.77	1.68
	Median	1	1	1	1	1

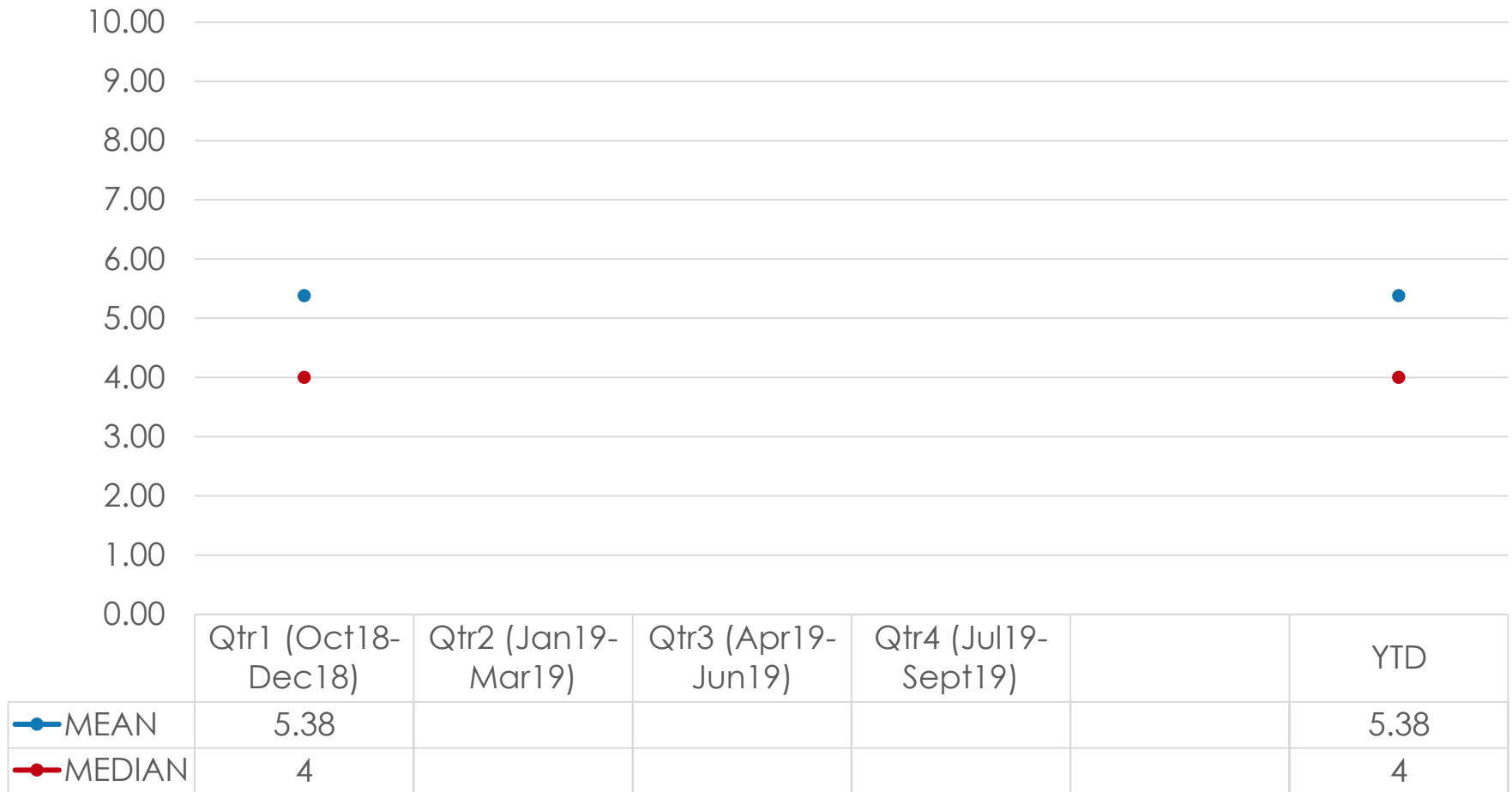
Prepared by Anthology Research

Length of Stay

MEAN NUMBER OF NIGHTS = 5.38
MEDIAN NUMBER OF NIGHTS = 4



Length of Stay – FY2019 Tracking



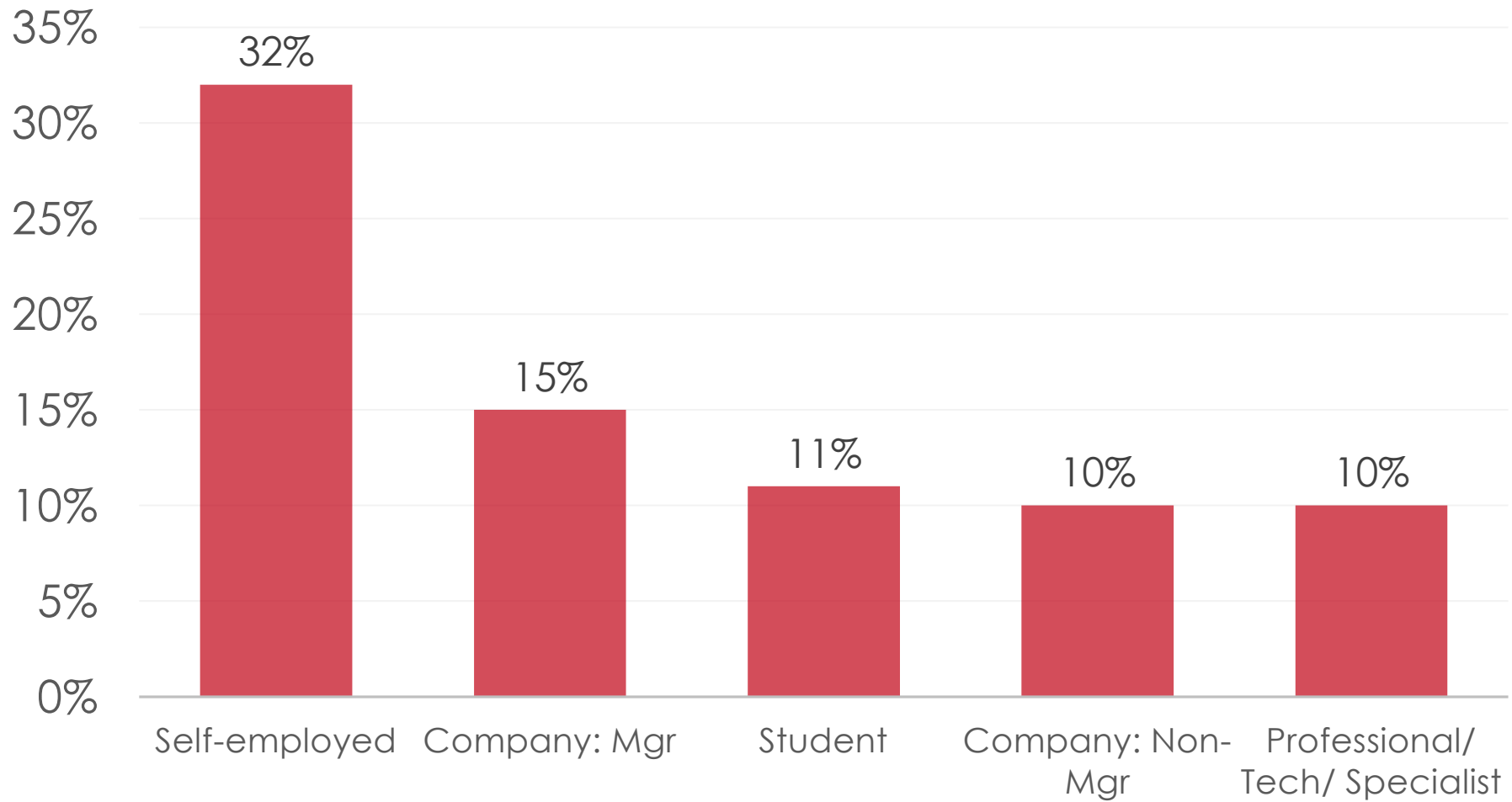
Length of Stay – Key Segments

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

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
SA	1-2	9%		7%	8%	8%
	3	30%		33%	31%	34%
	4+	62%	100%	59%	61%	58%
	Total	104	4	81	90	50
SA	Mean	5.38	5.25	5.57	5.53	4.28
	Median	4	5	4	4	4

Prepared by Anthology Research

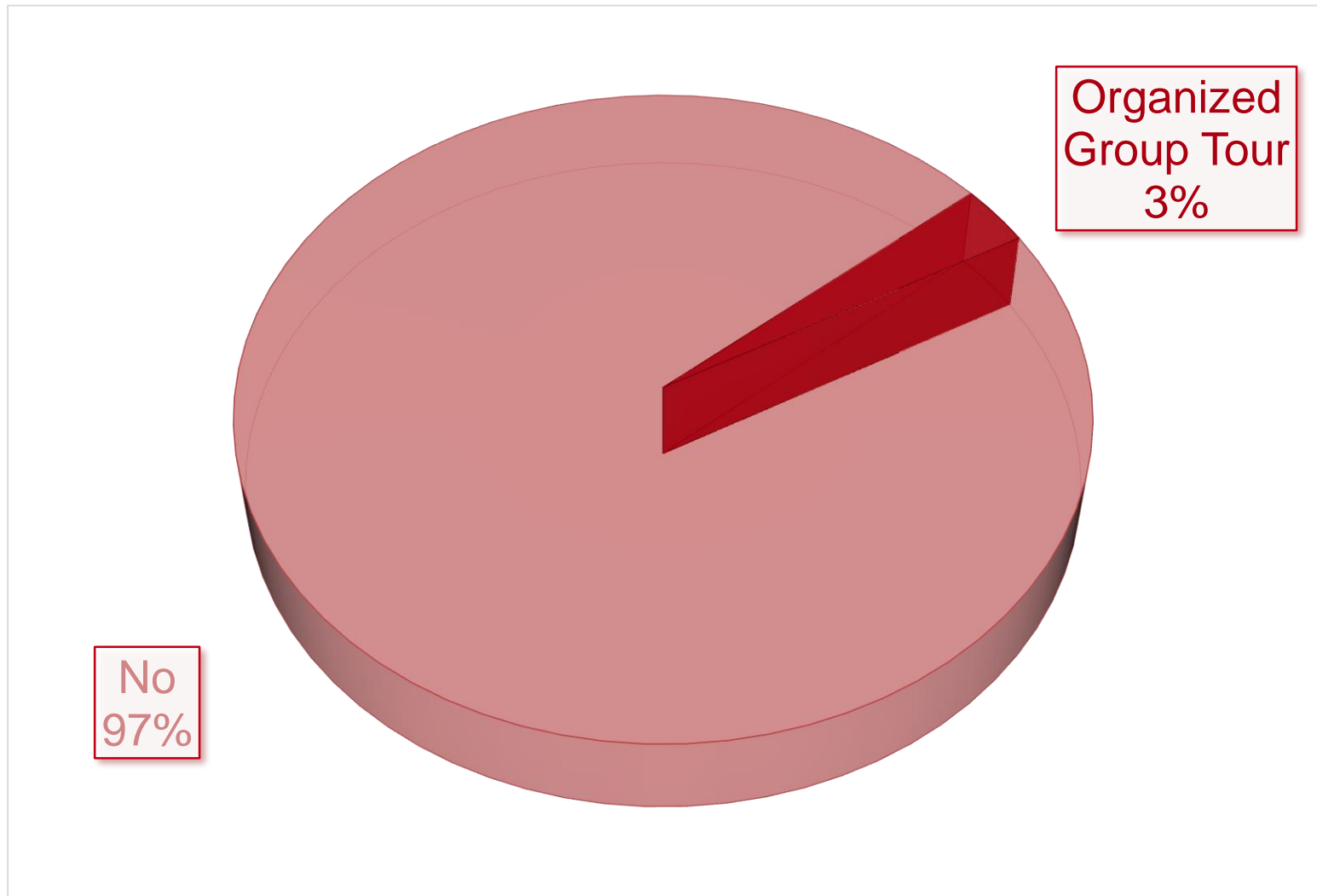
Occupation – Top Responses (10%+)



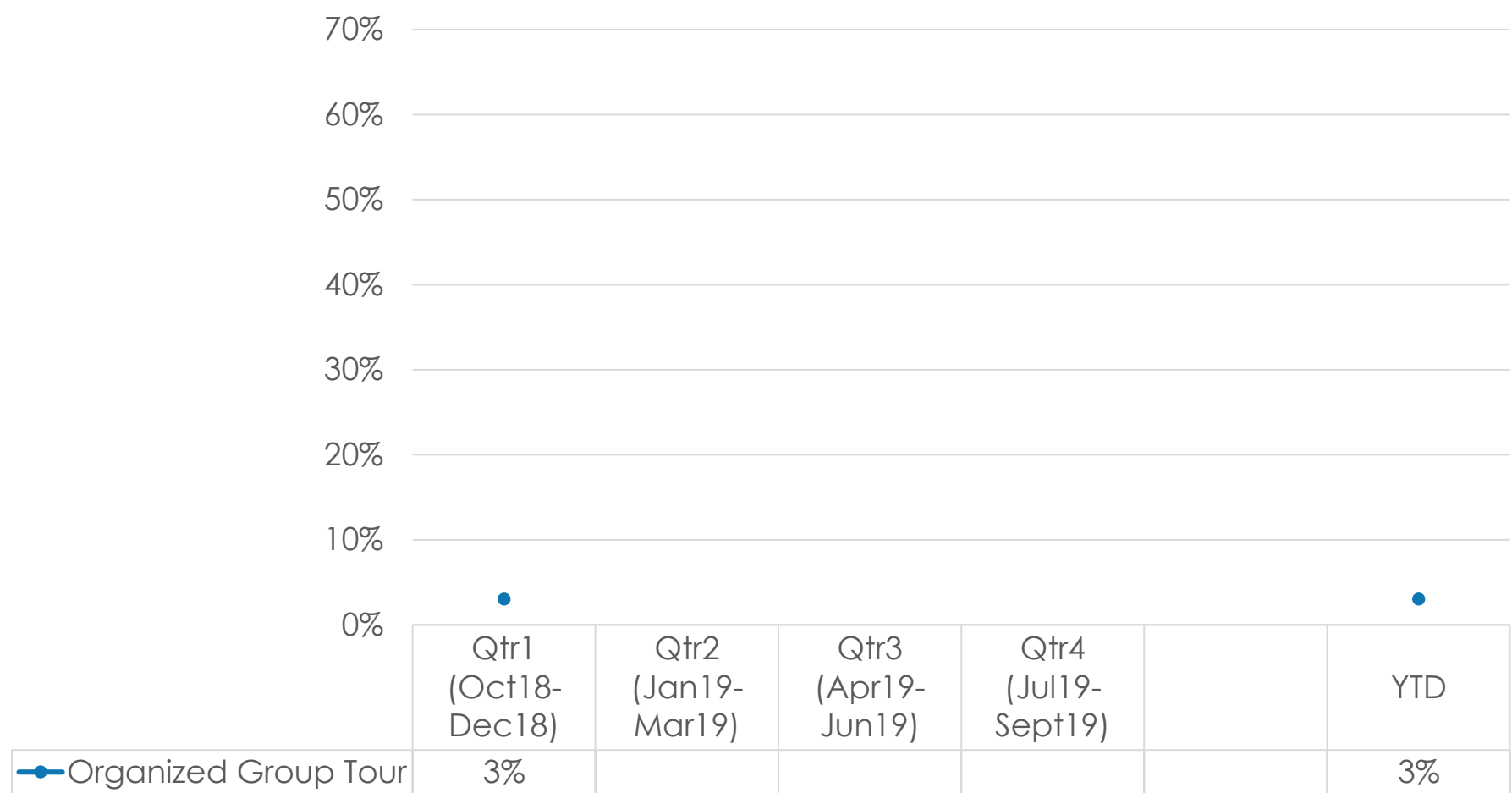
SECTION 2

TRAVEL PLANNING

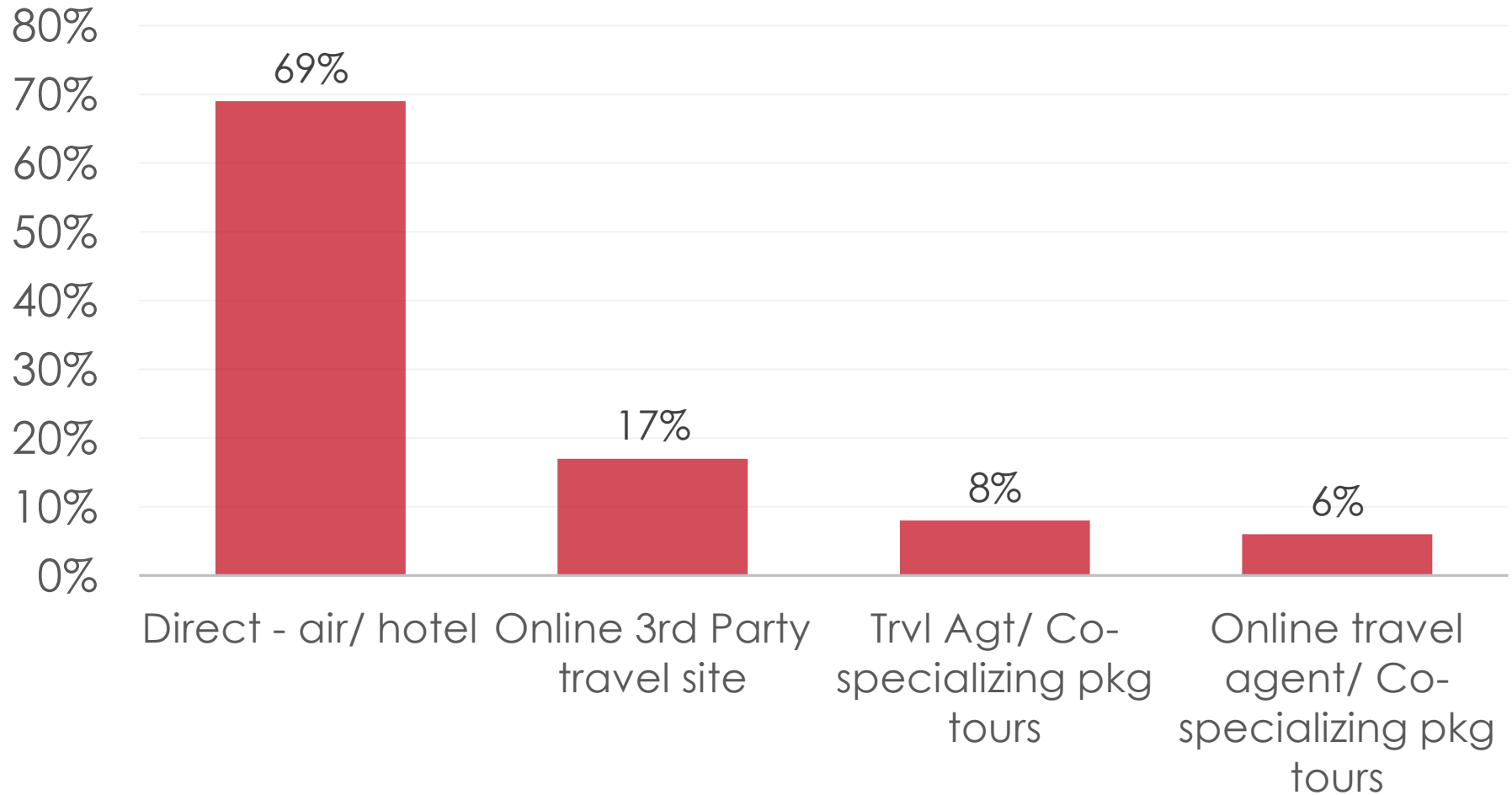
Organized Group Tour



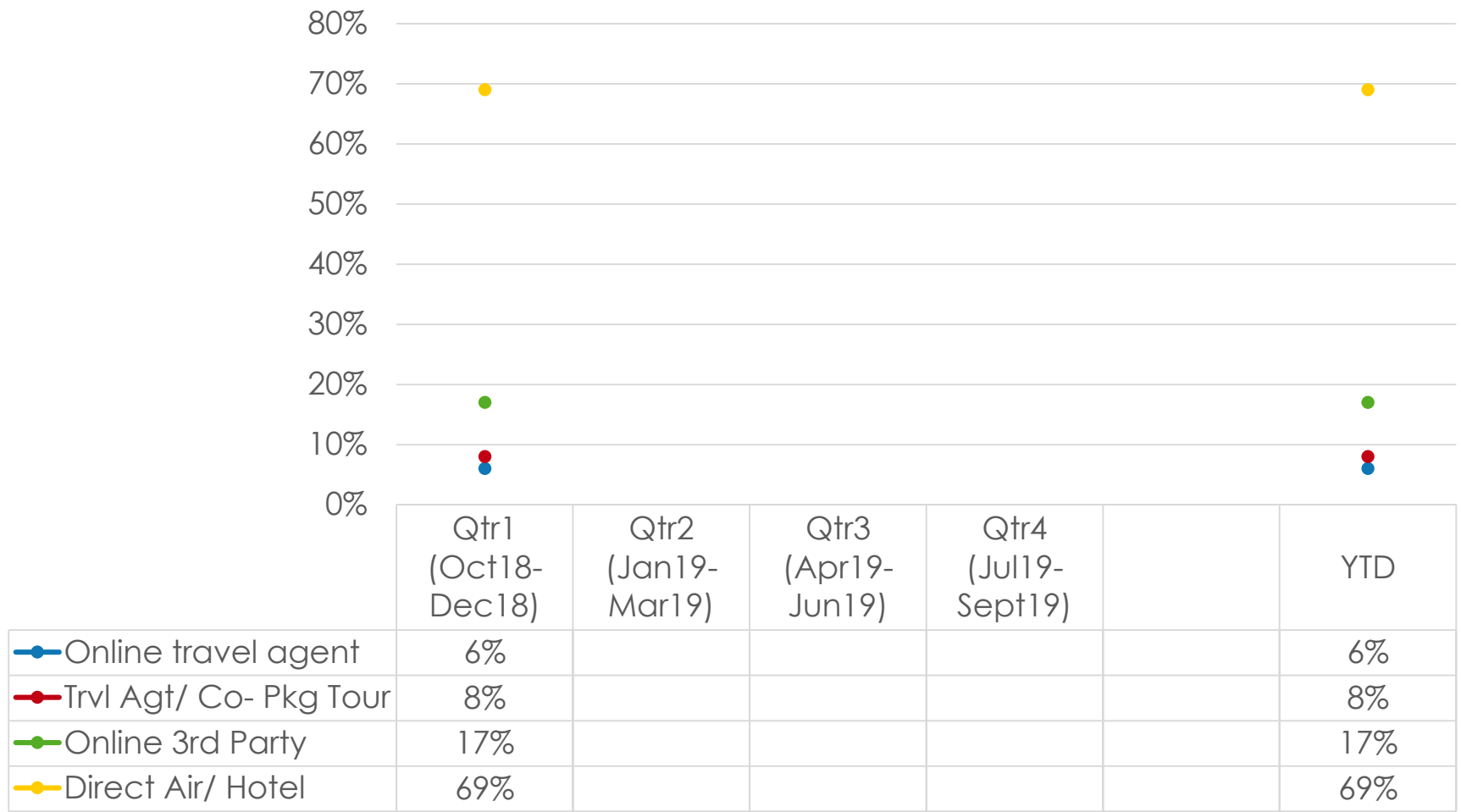
Organized Group Tour



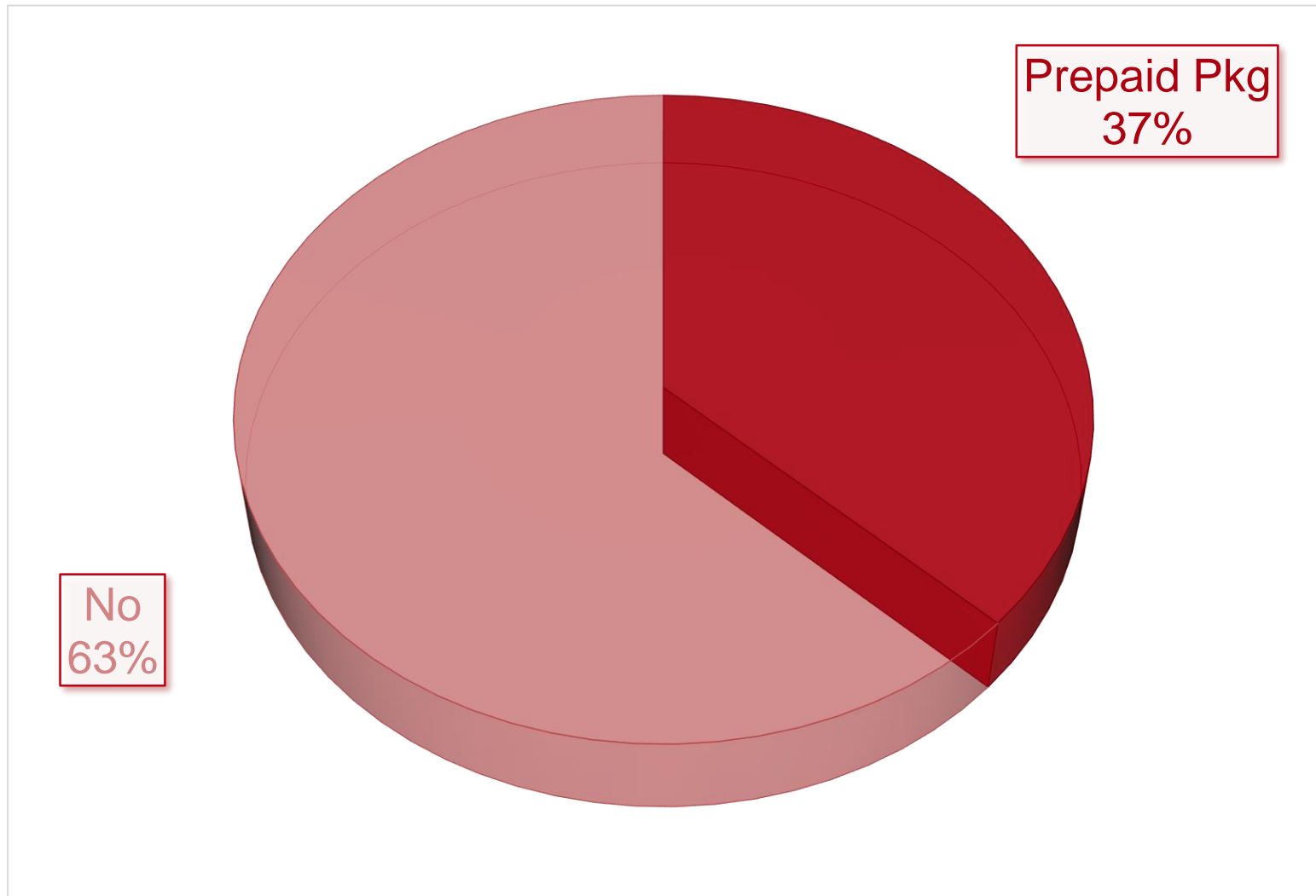
Travel Arrangements Sources



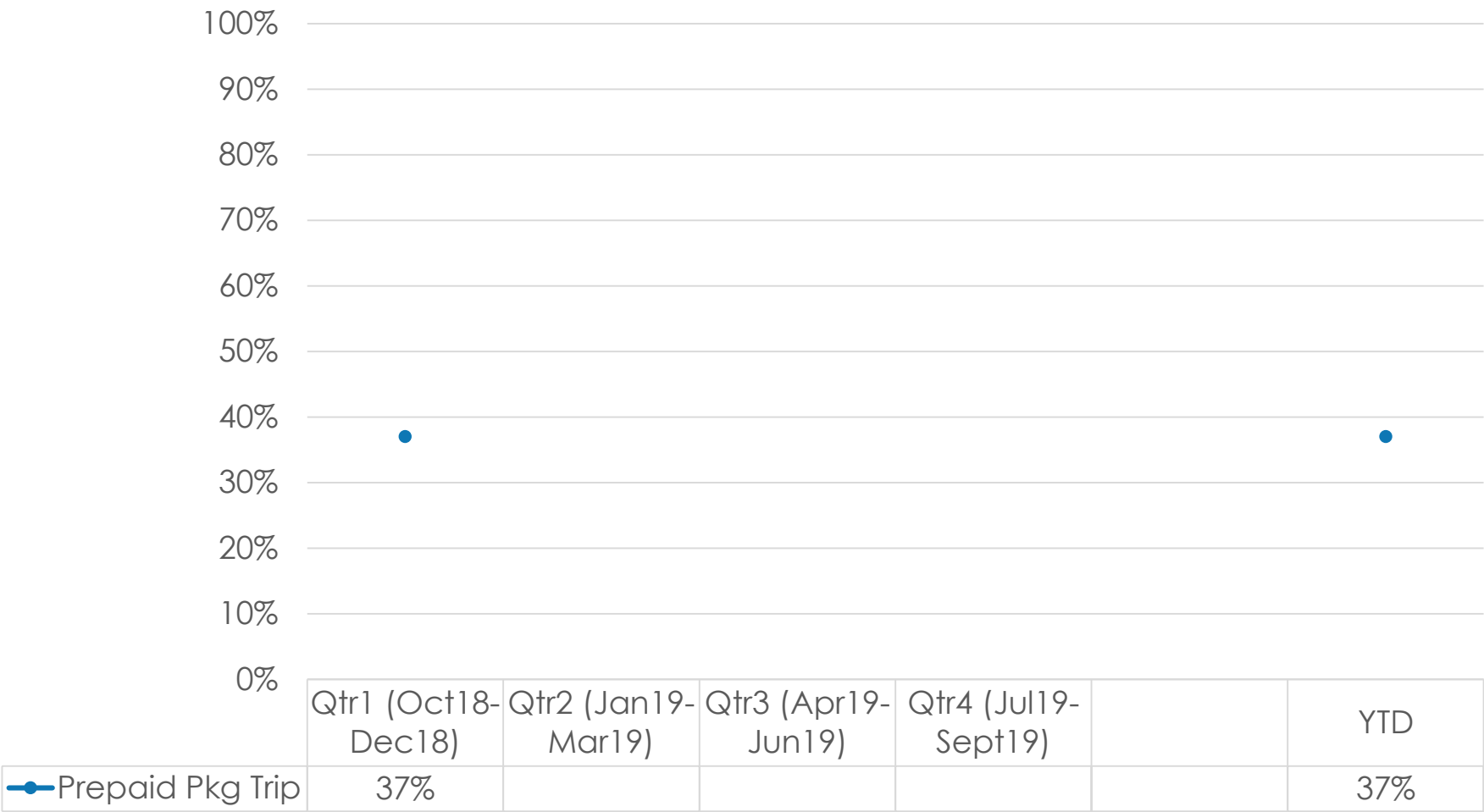
Travel Arrangements Sources



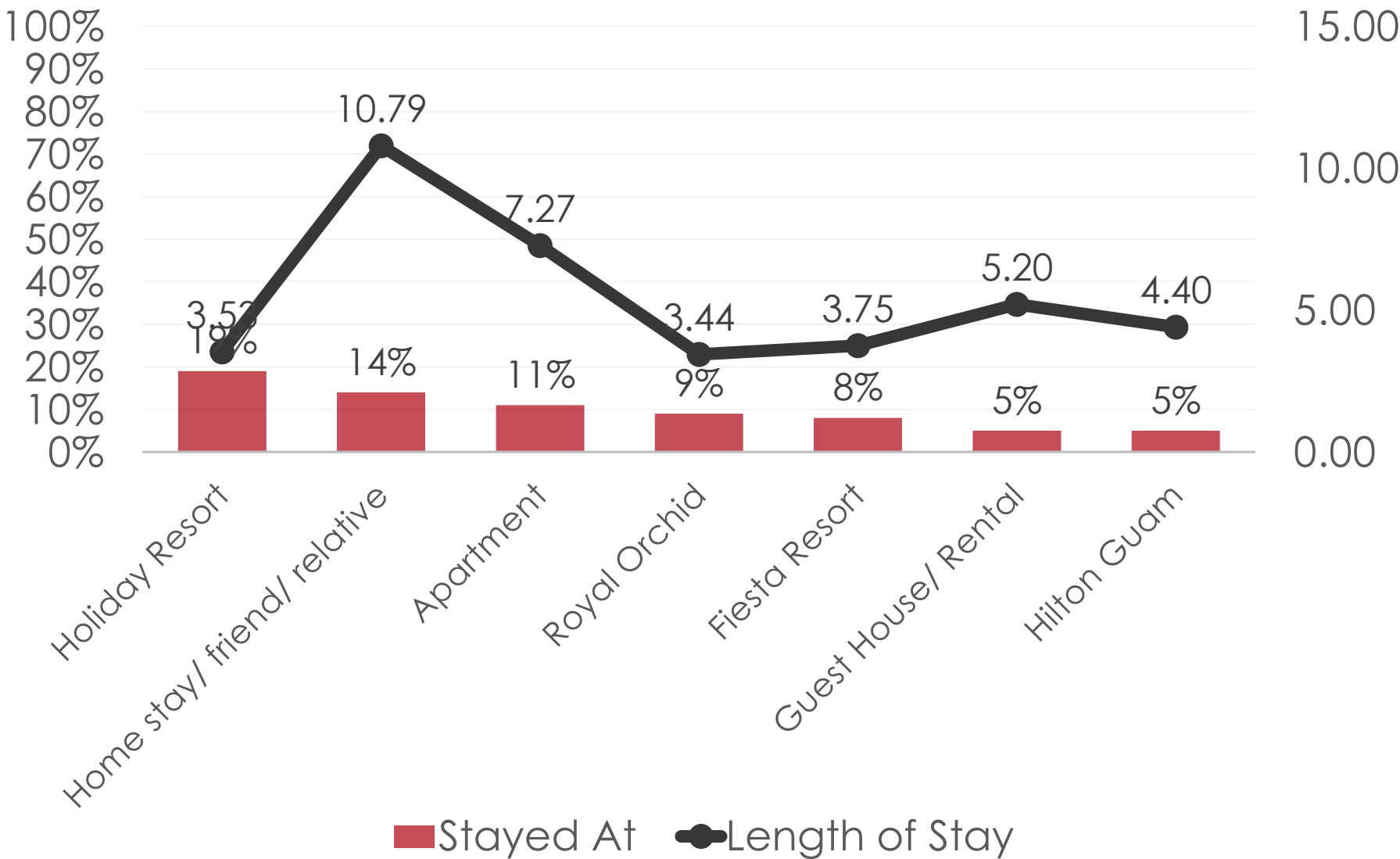
Prepaid Package Trip



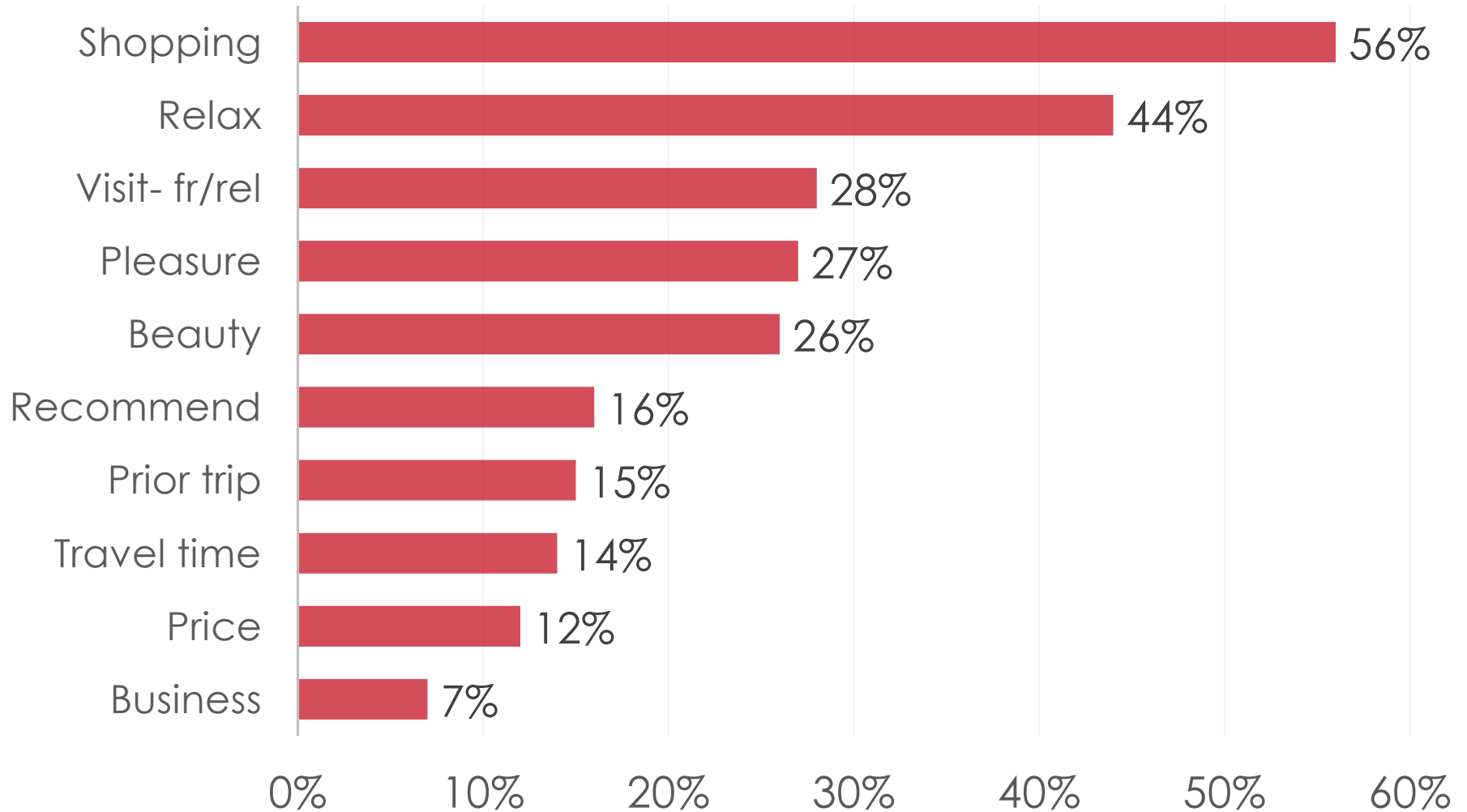
Prepaid Package Trip



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	Shopping	56%	25%	59%	57%	66%
	Just to relax	44%		57%	48%	62%
	To visit friends or relatives	28%		23%	30%	26%
	Pleasure/ vacation	27%	25%	35%	28%	22%
	Beautiful seas, beaches, tropical climate	26%	25%	33%	27%	32%
	Recommendation of friend/ relative/ travel agency	16%	25%	12%	16%	20%
	A previous visit	15%		12%	17%	16%
	Short travel time (not too far from home)	14%		12%	14%	14%
	Price of the tour package	12%	25%	7%	8%	12%
	Company/ business trip	7%	50%	4%	6%	2%
	Water sports (snorkeling, windsurfing, parasailing)	4%		4%	1%	
	It is a safe place to spend a vacation	4%		5%	4%	2%
	Adventure	4%		2%	2%	
	Convention/ conference/ trade show/ meeting	2%	50%	1%	2%	
	Honeymoon	2%		2%	1%	2%
	Incentive trip	2%	50%			
	Scuba diving	1%			1%	
	My company sponsored me	1%		1%		
	School trip	1%		1%	1%	
	Total	104	4	81	90	50

Prepared by Anthology Research

SECTION 3

EXPENDITURES

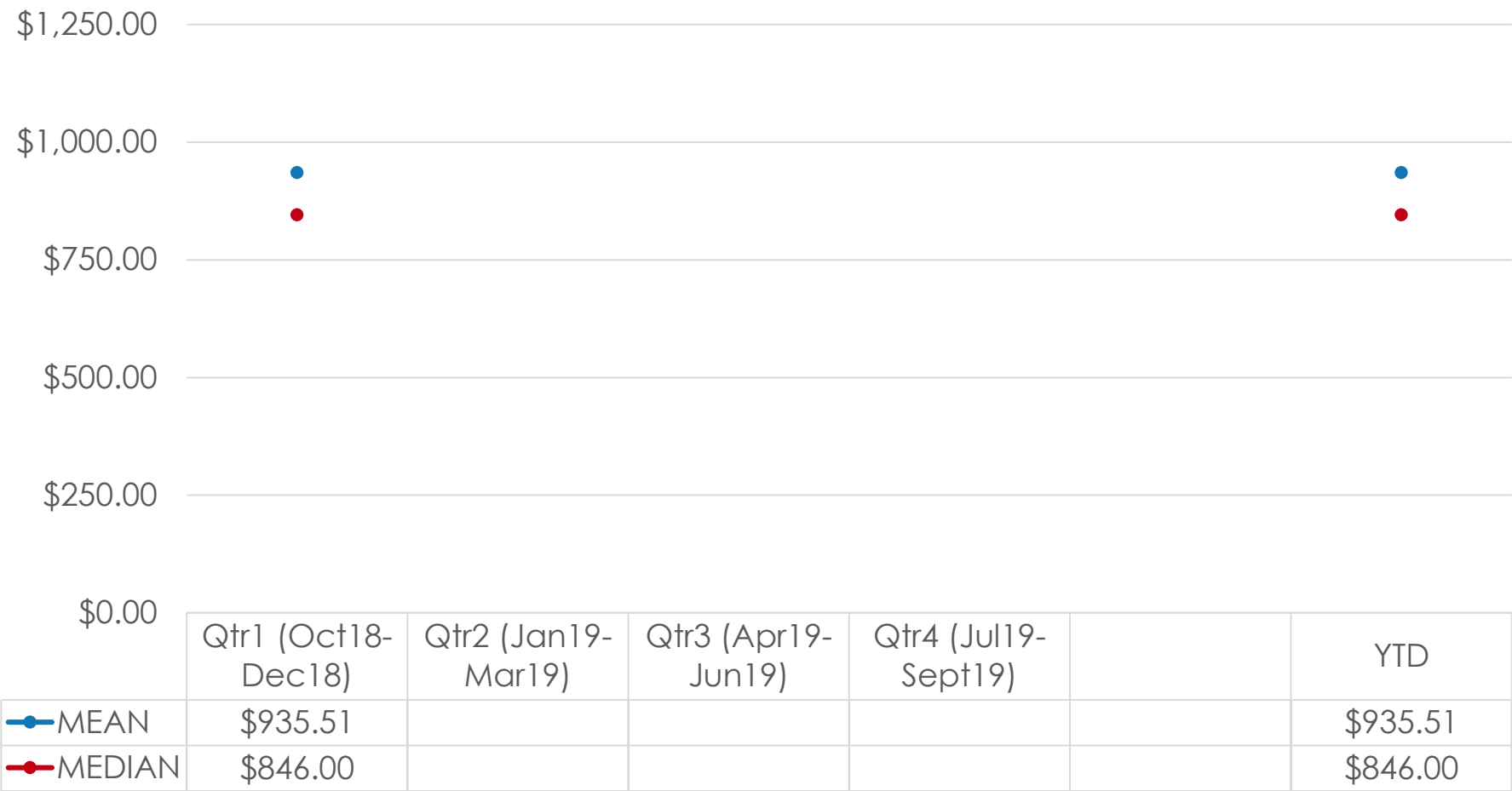
Prepaid Expenditures

EXCHANGE RATE Peso 53.20=\$1

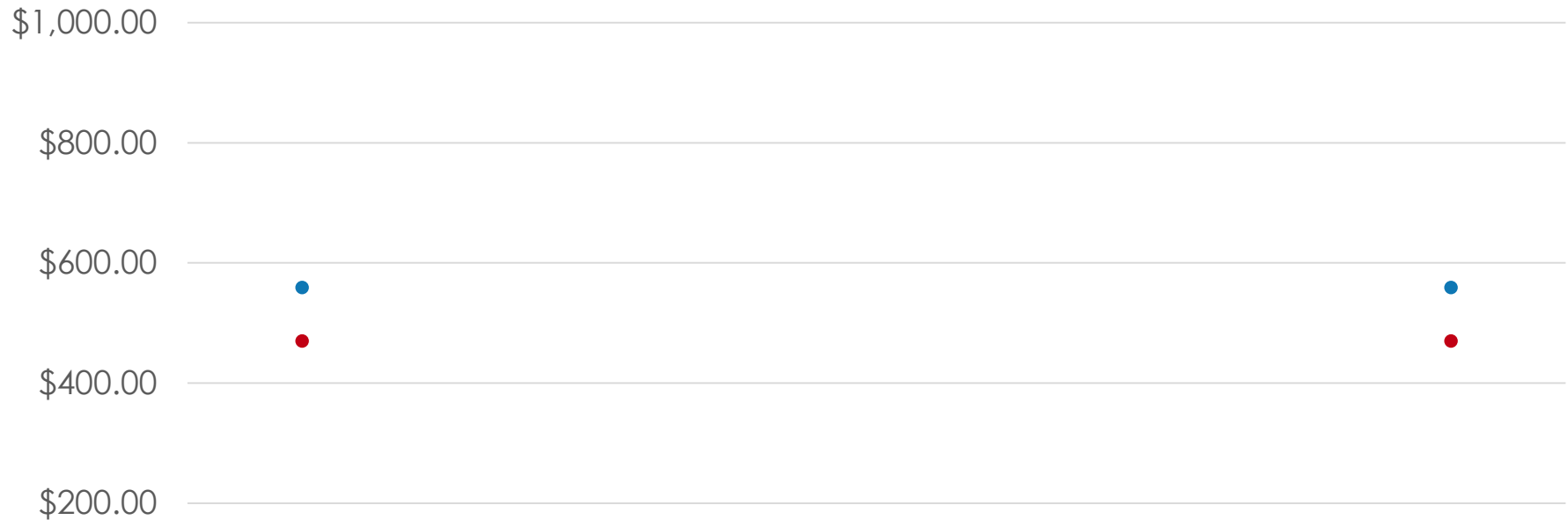
- \$935.51 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$559.06 = overall mean average per person prepaid expenditures

Prepaid Entire Travel Party – FY2019

Tracking



Prepaid Per Person– FY2019 Tracking



	Qtr1 (Oct18-Dec18)	Qtr2 (Jan19-Mar19)	Qtr3 (Apr19-Jun19)	Qtr4 (Jul19-Sept19)		YTD
MEAN	\$559.06					\$559.06
MEDIAN	\$470.00					\$470.00

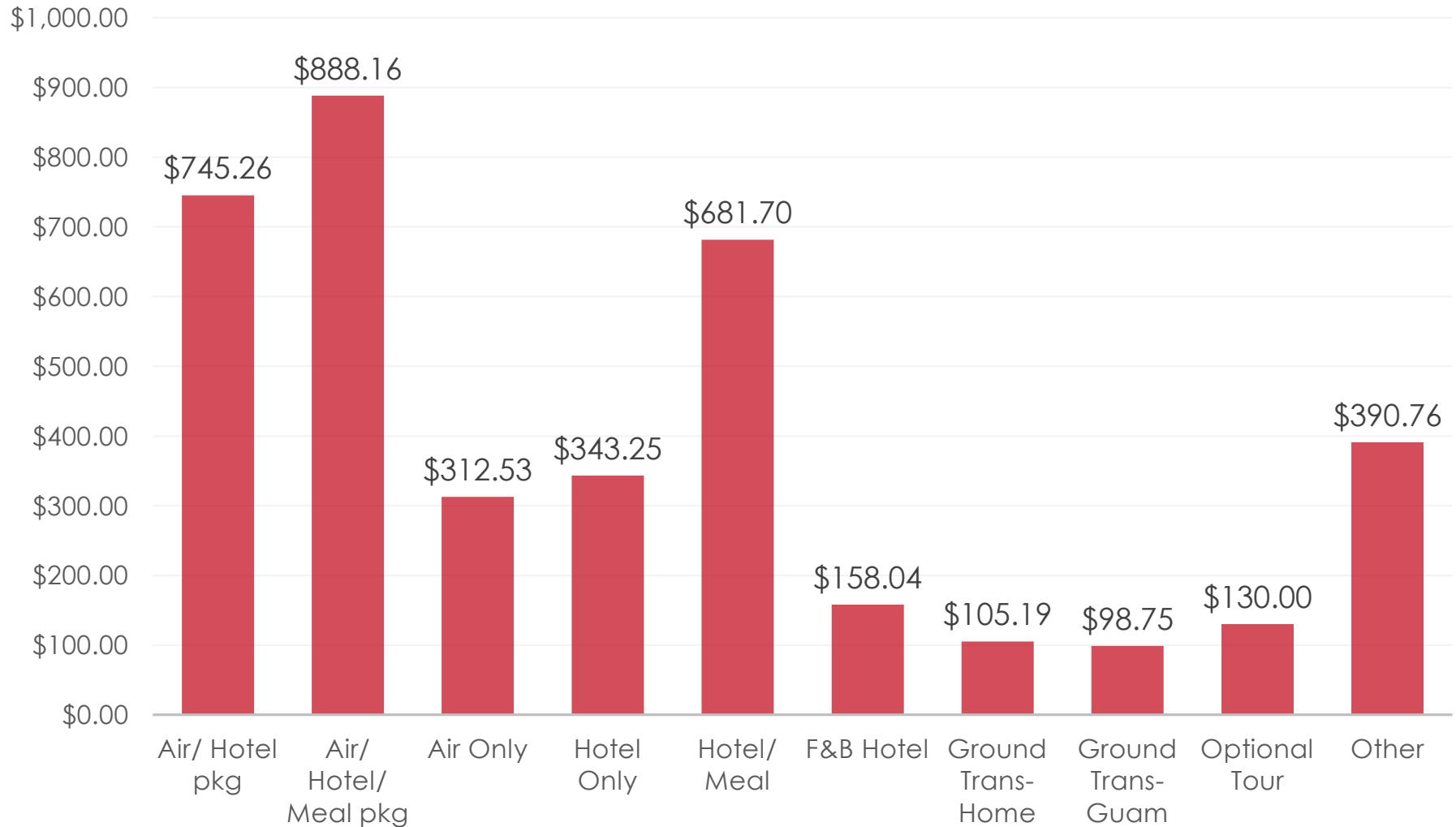
Prepaid Per Person– Key Segments

GVB EXIT SURVEY
Q10A PREPAID - PER PERSON:

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
PREPAID PP	Mean	\$559.06	\$545.68	\$549.80	\$556.57	\$535.33
	Median	\$470	\$450	\$470	\$470	\$470

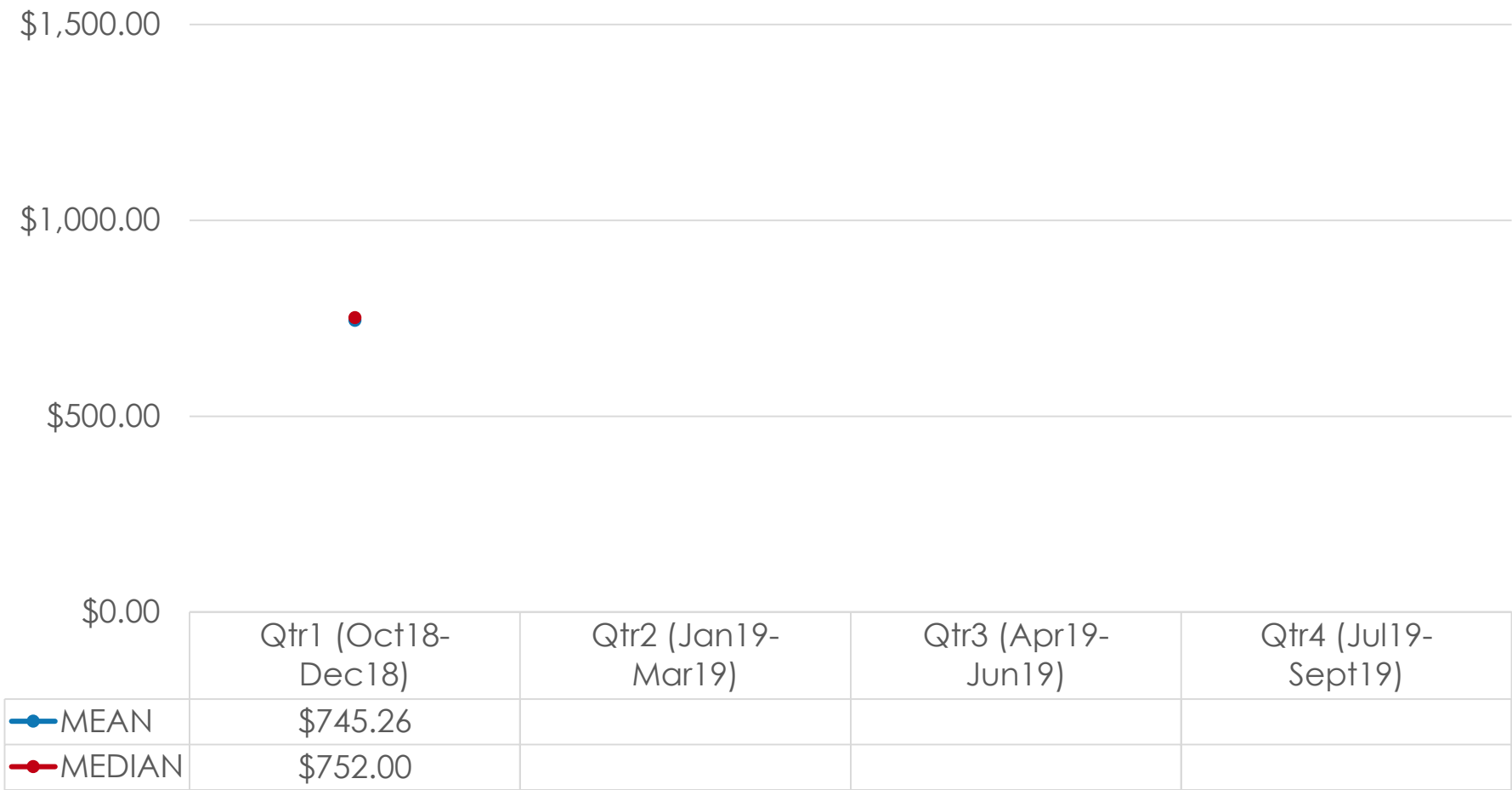
Prepared by Anthology Research

Prepaid Expenses by Category – MEAN Entire Travel Party



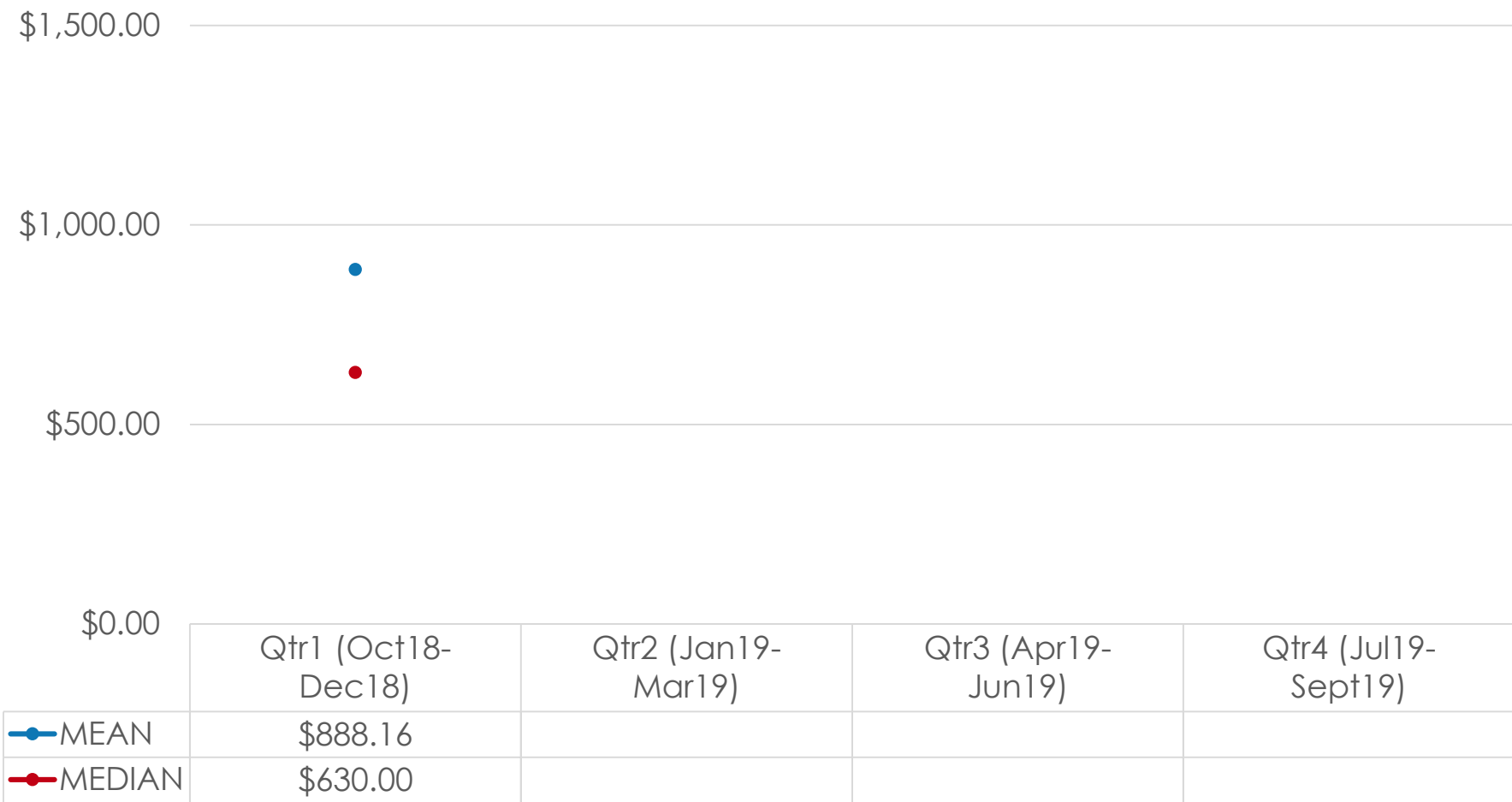
Prepaid– FY2019 Tracking

Airfare & Accommodation Packages



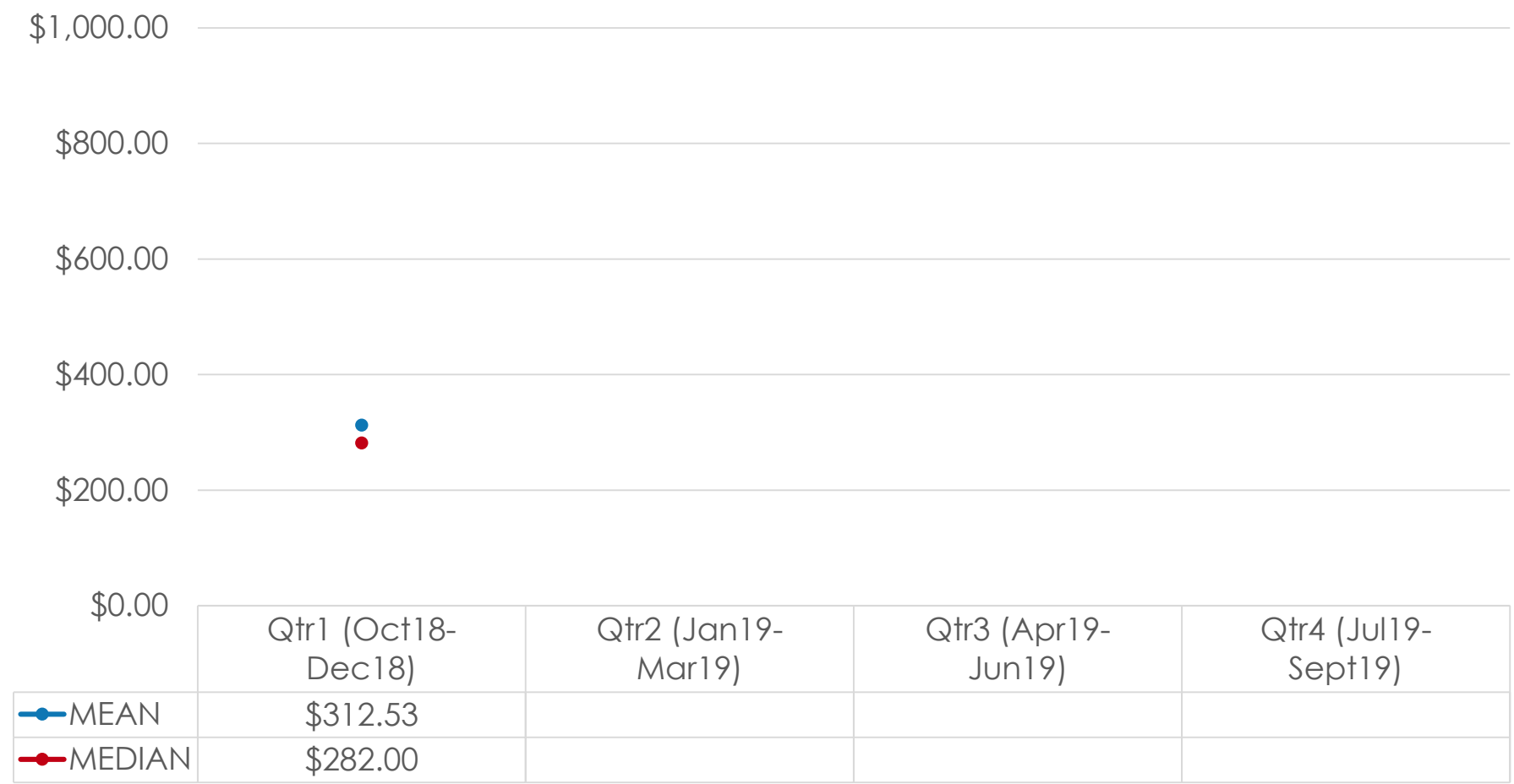
Prepaid– FY2019 Tracking

Airfare & Accommodation W/ Meal Packages

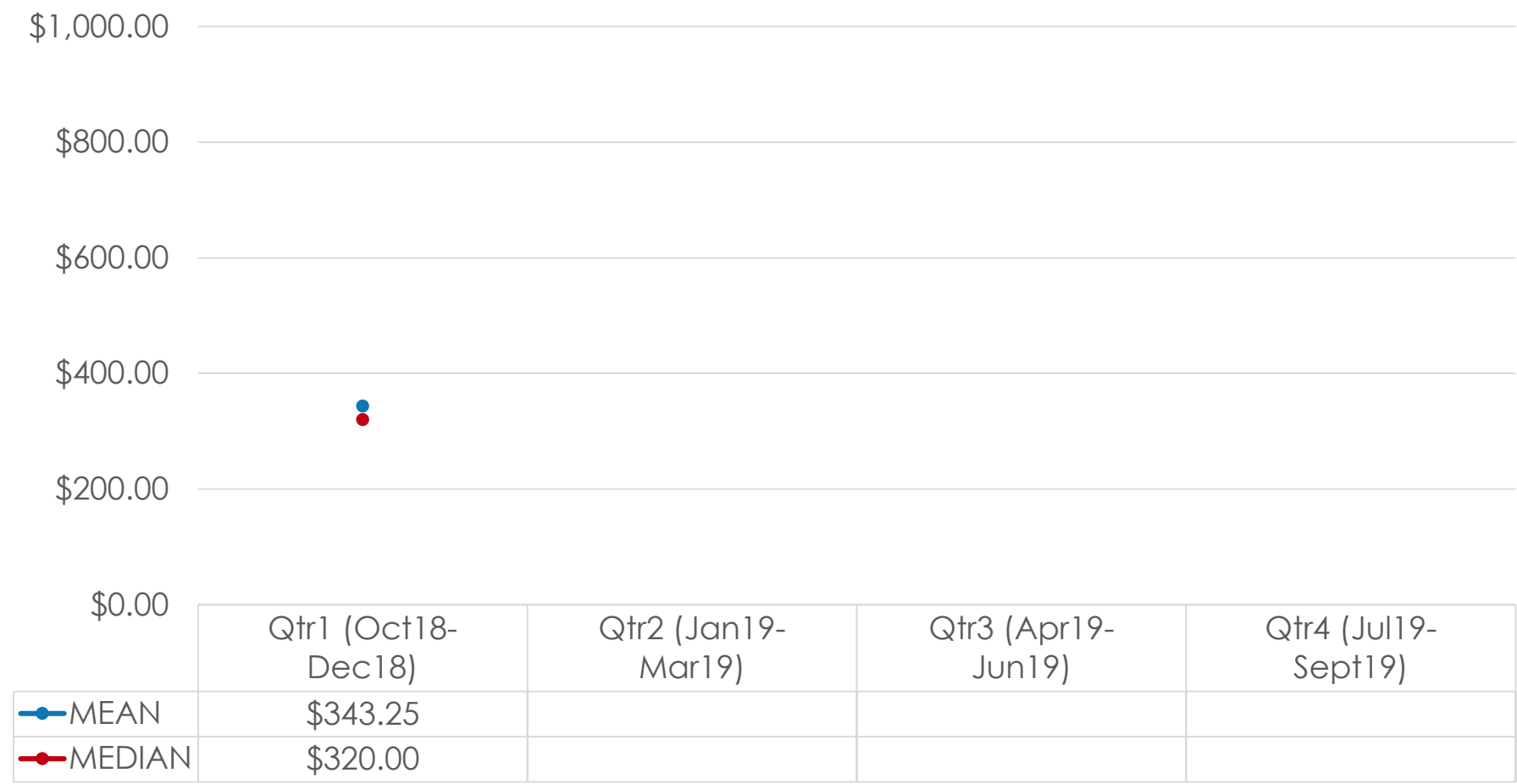


Prepaid– FY2019 Tracking

Airfare Only

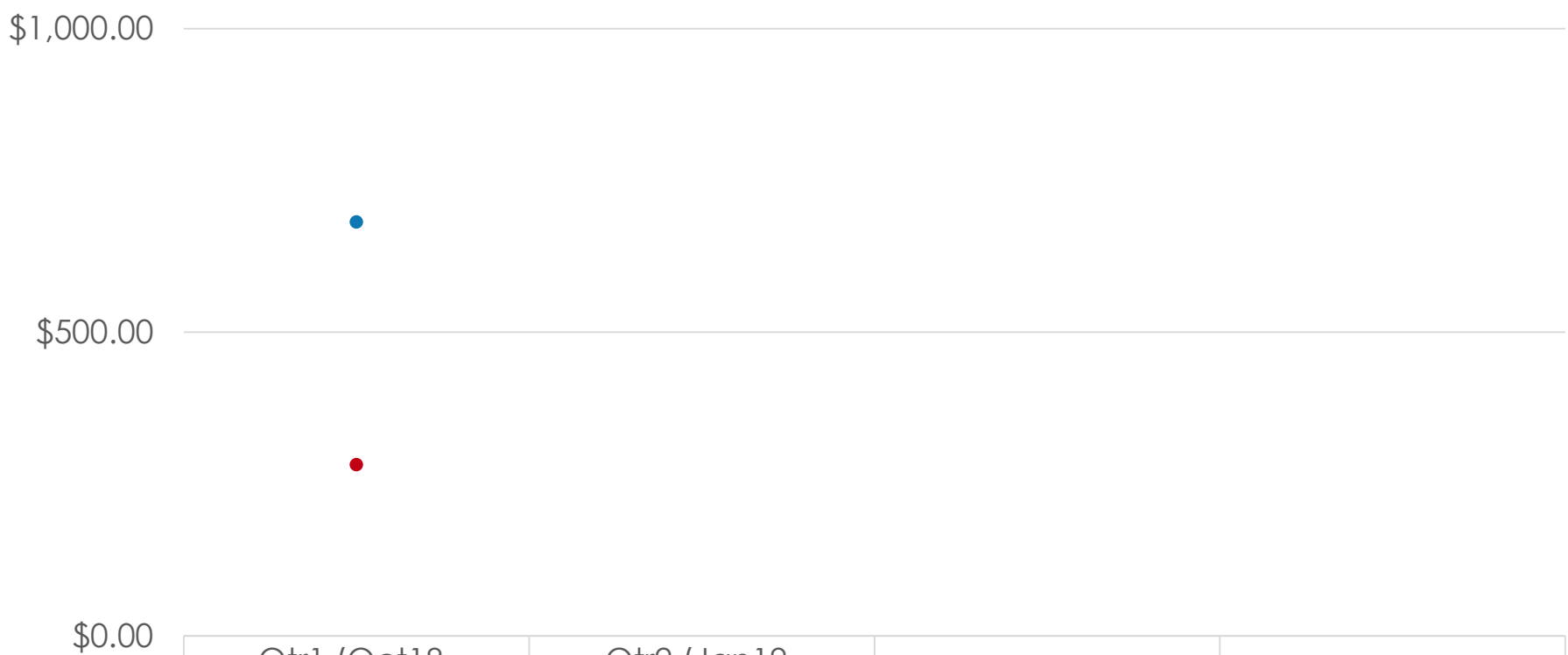


Prepaid– FY2019 Tracking Accommodations Only



Prepaid– FY2019 Tracking

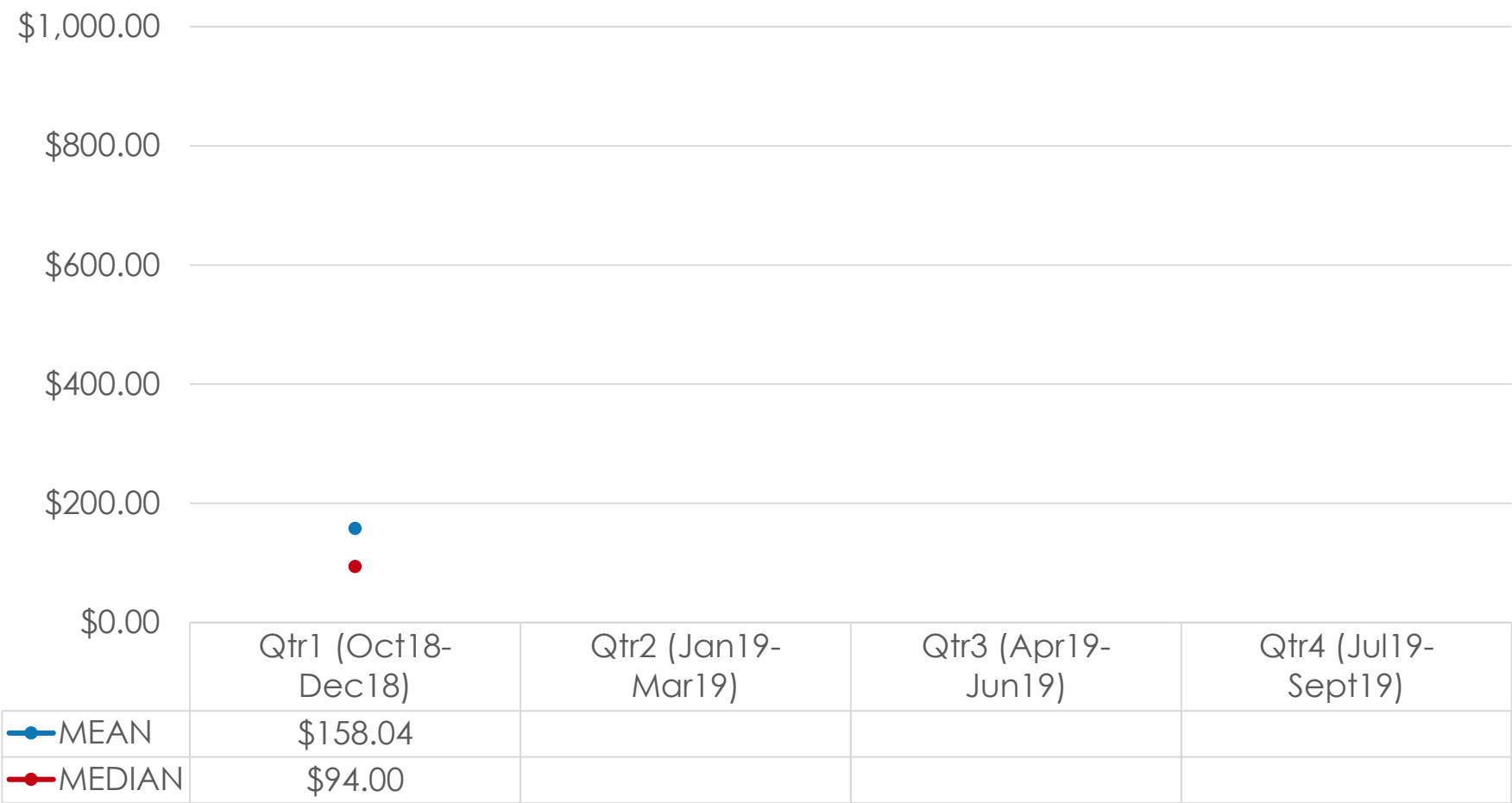
Accommodations w/ Meal Only



	Qtr1 (Oct18-Dec18)	Qtr2 (Jan19-Mar19)	Qtr3 (Apr19-Jun19)	Qtr4 (Jul19-Sept19)
MEAN	\$681.70			
MEDIAN	\$282.00			

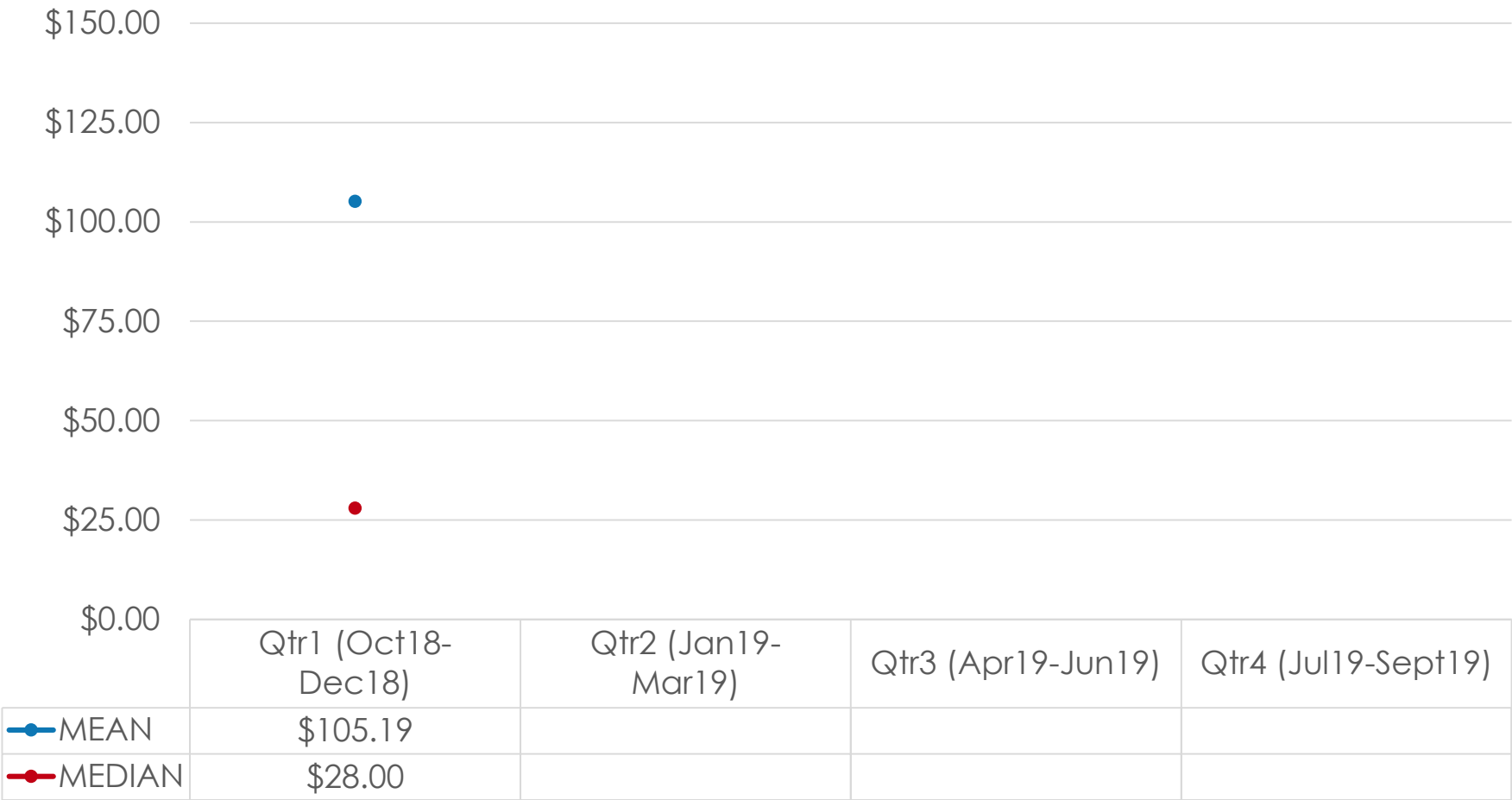
Prepaid– FY2019 Tracking

Food & Beverage in Hotel



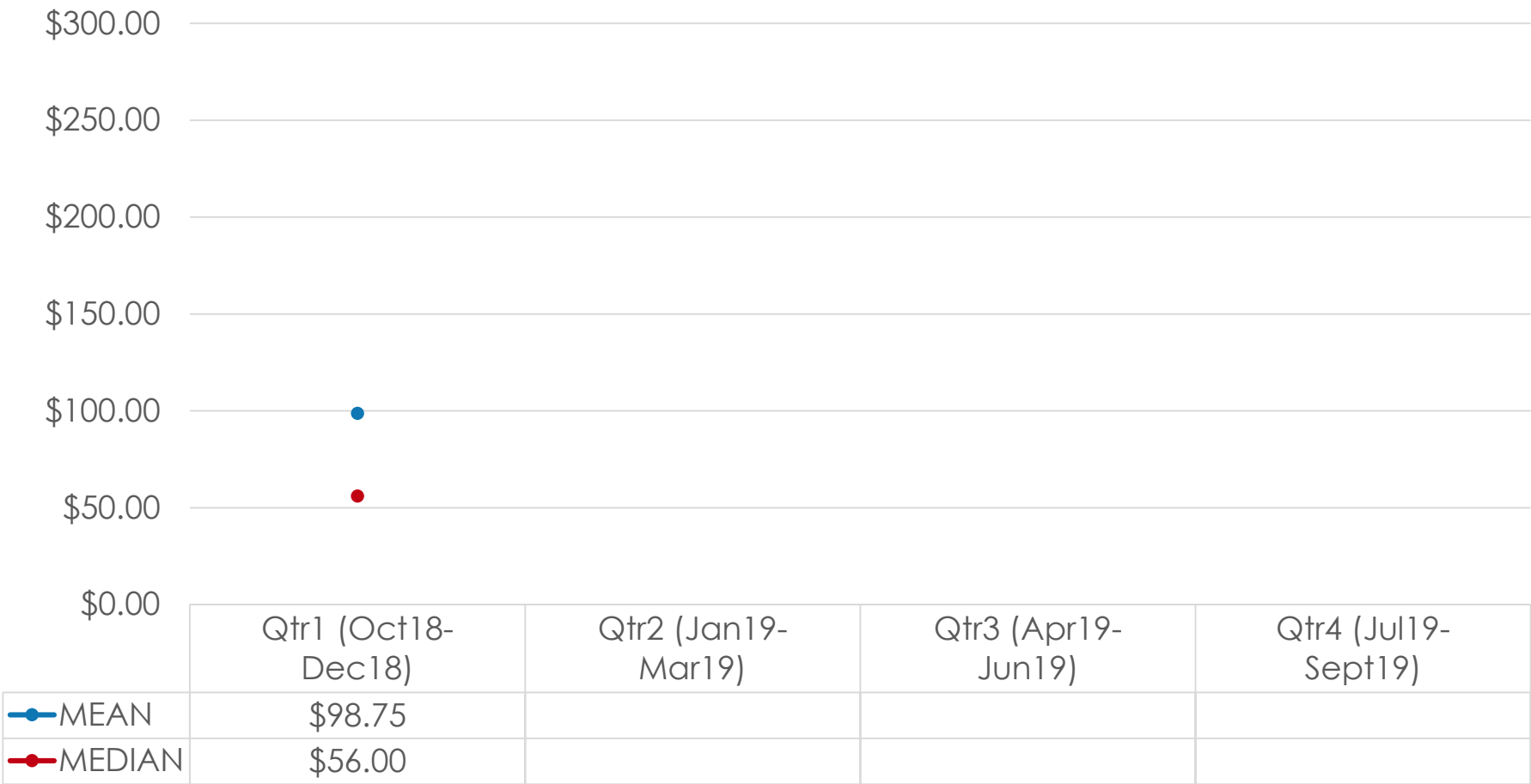
Prepaid– FY2019 Tracking

Ground Transportation - Philippines



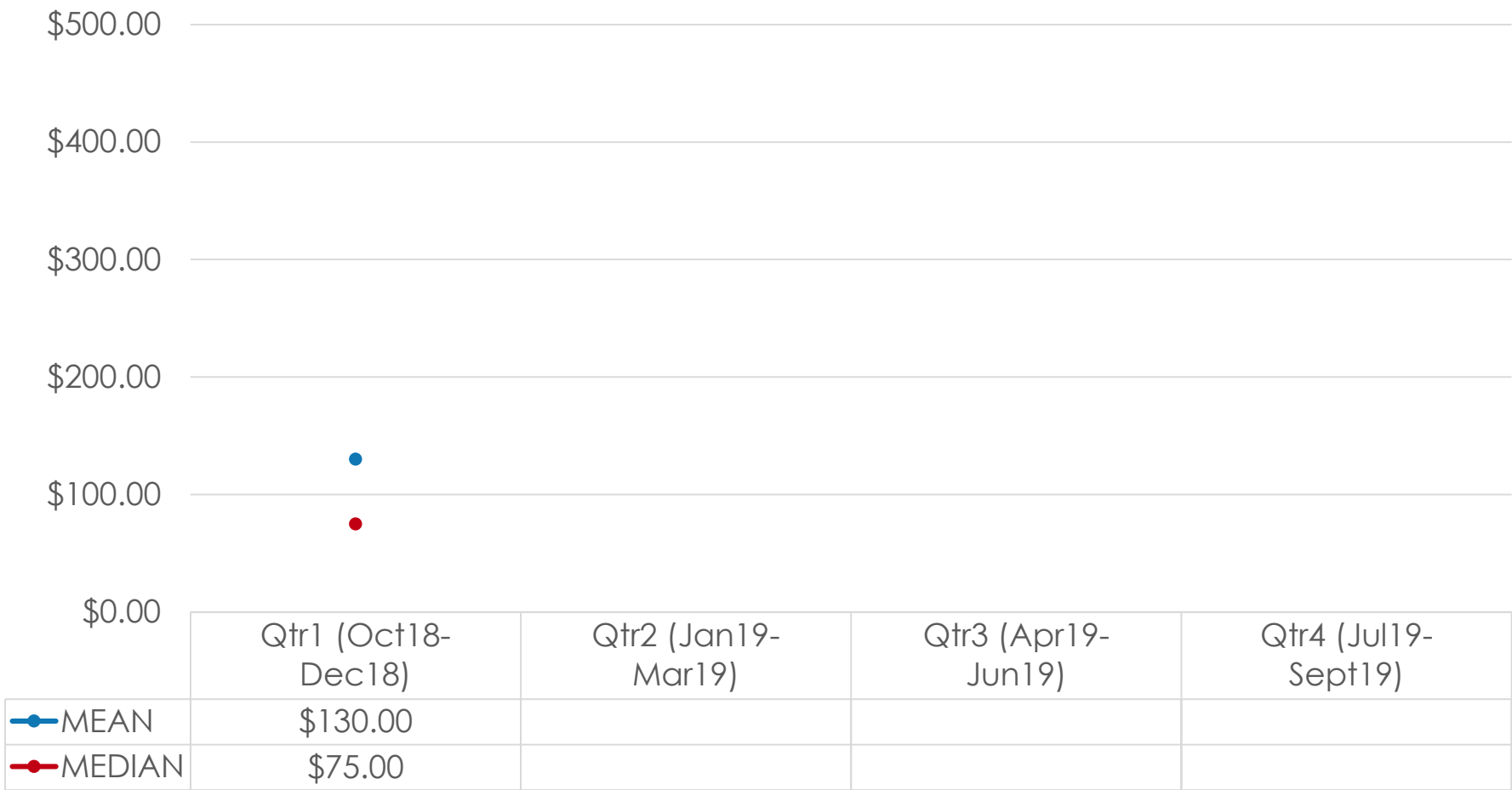
Prepaid– FY2019 Tracking

Ground Transportation - Guam



Prepaid– FY2019 Tracking

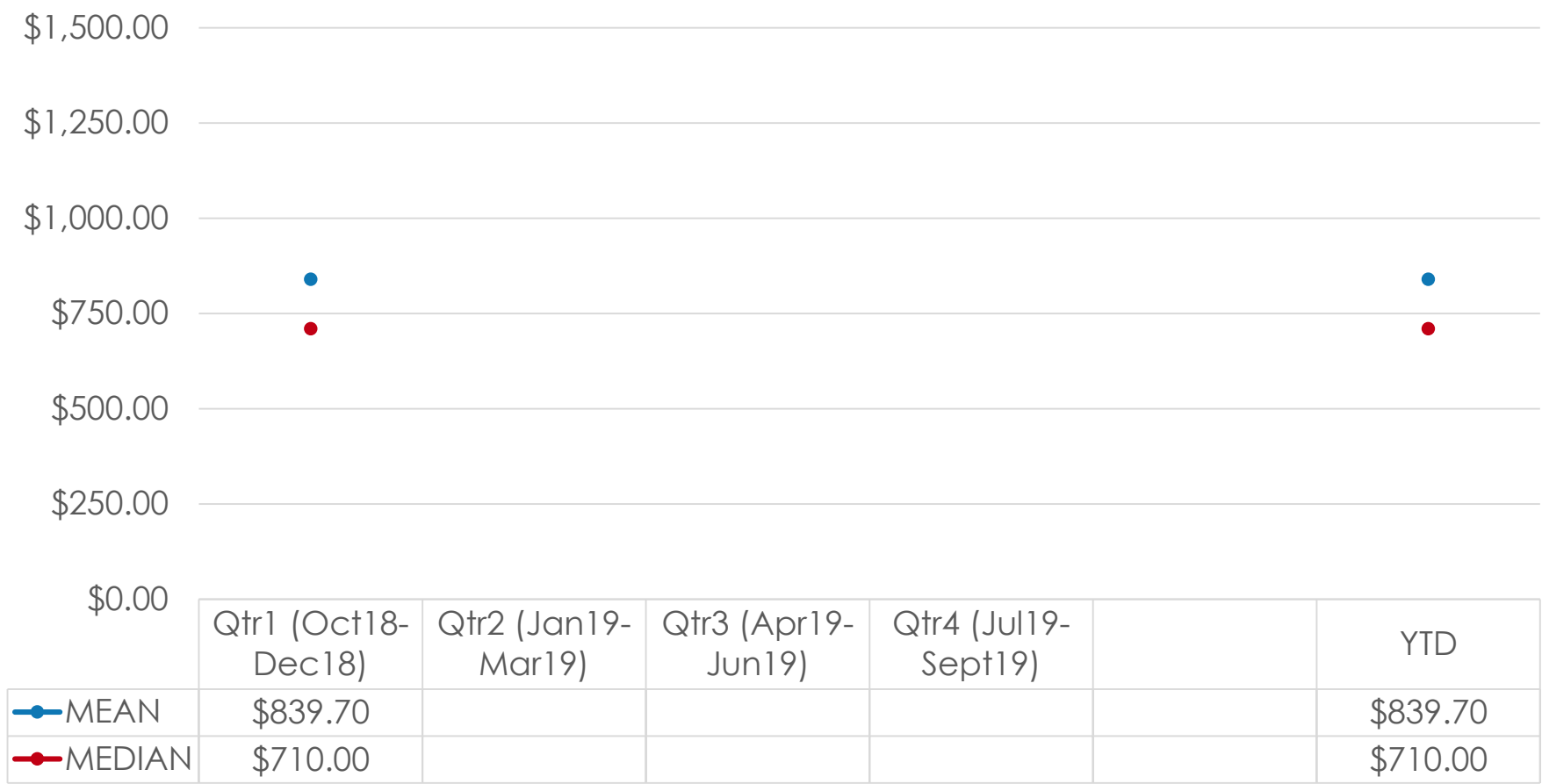
Optional tours/ Activities



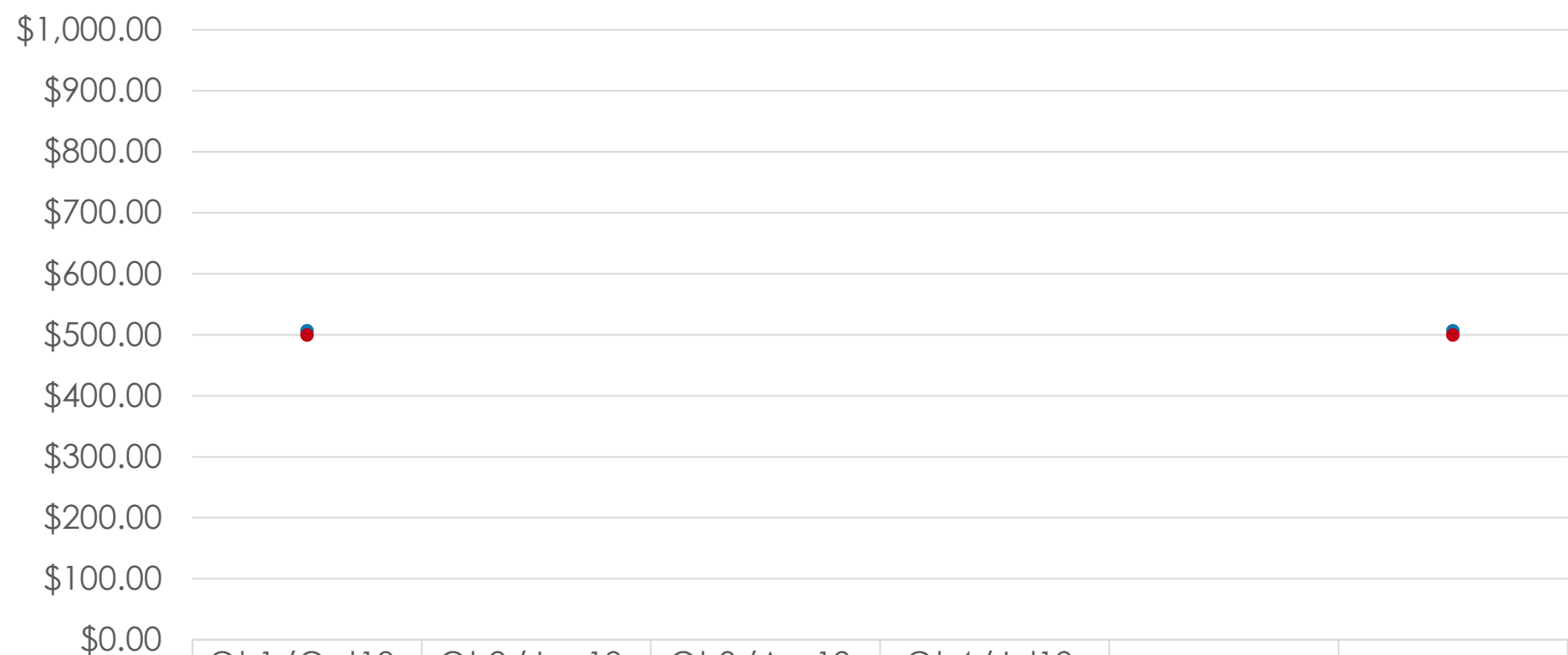
On-Island Expenditures

- \$839.70 = overall mean average on-island expense (for entire travel party size) by respondent
- \$507.02 = overall mean average per person on-island expenditures

On-Island Entire Travel Party – FY2019 Tracking



On-Island Per Person – FY2019 Tracking



	Qtr1 (Oct18-Dec18)	Qtr2 (Jan19-Mar19)	Qtr3 (Apr19-Jun19)	Qtr4 (Jul19-Sept19)		YTD
MEAN	\$507.02					\$507.02
MEDIAN	\$500.00					\$500.00

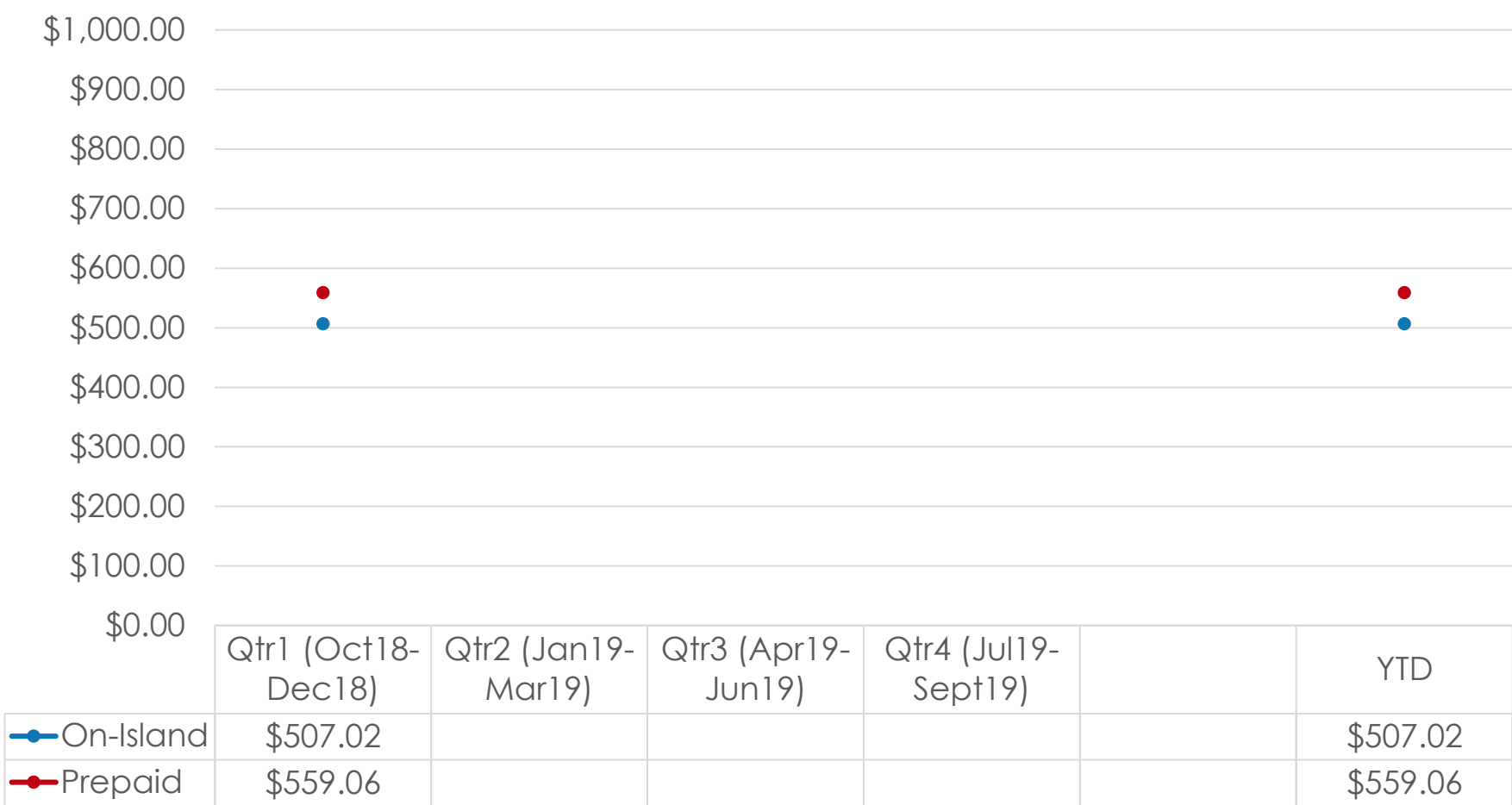
On-Island Per Person – Key Segments

GVB EXIT SURVEY
Q11A ONISLE EXPENDITURE- PER PERSO

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
ONISLE PP	Mean	\$507.02	\$214.50	\$540.16	\$538.20	\$505.60
	Median	\$500	\$192	\$500	\$500	\$495

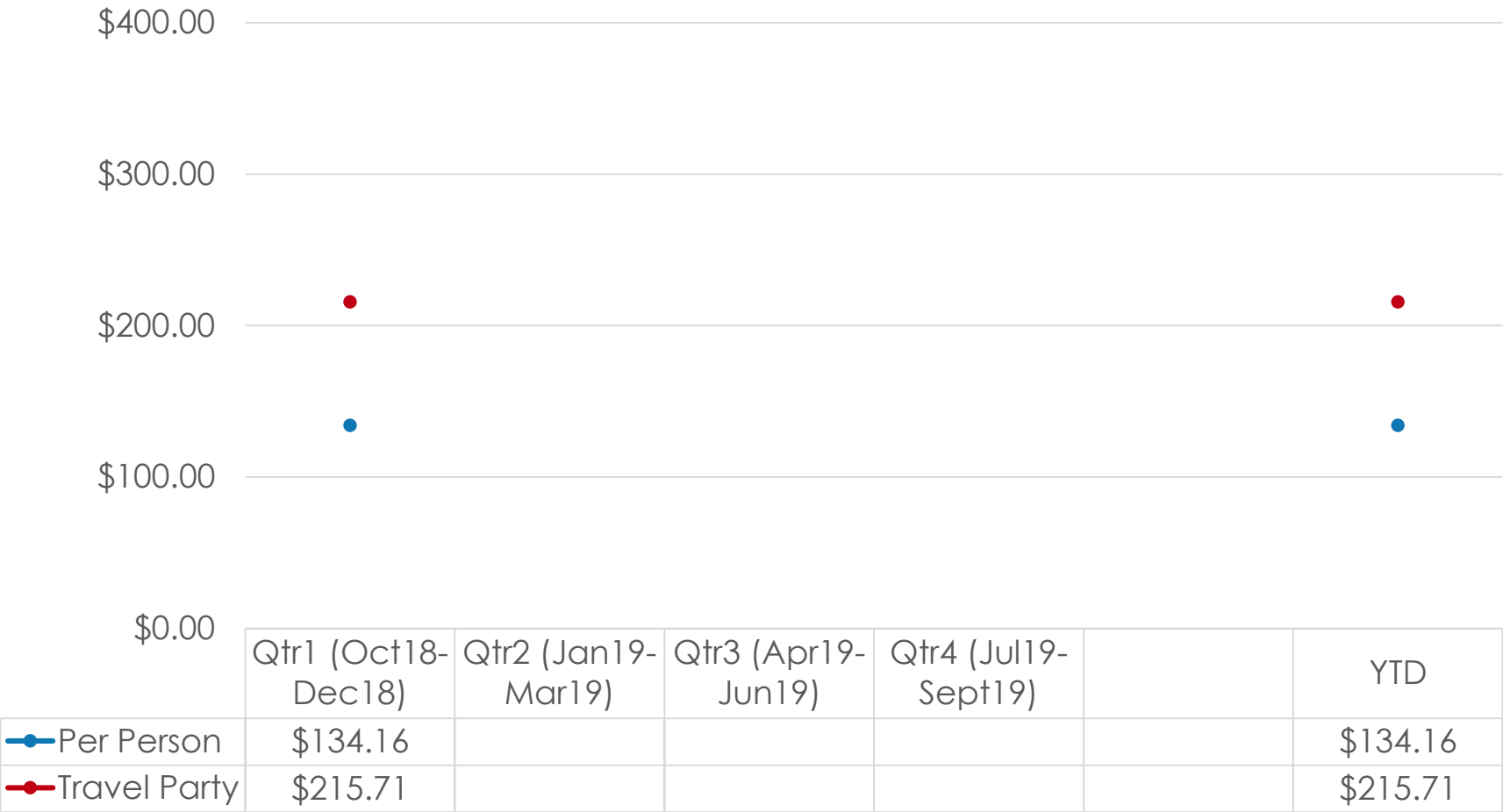
Prepared by Anthology Research

Per Person MEAN expenditures – FY2019 Tracking On-Island/ Prepaid



On-Island Per Day Spending – FY2019 Tracking

MEAN

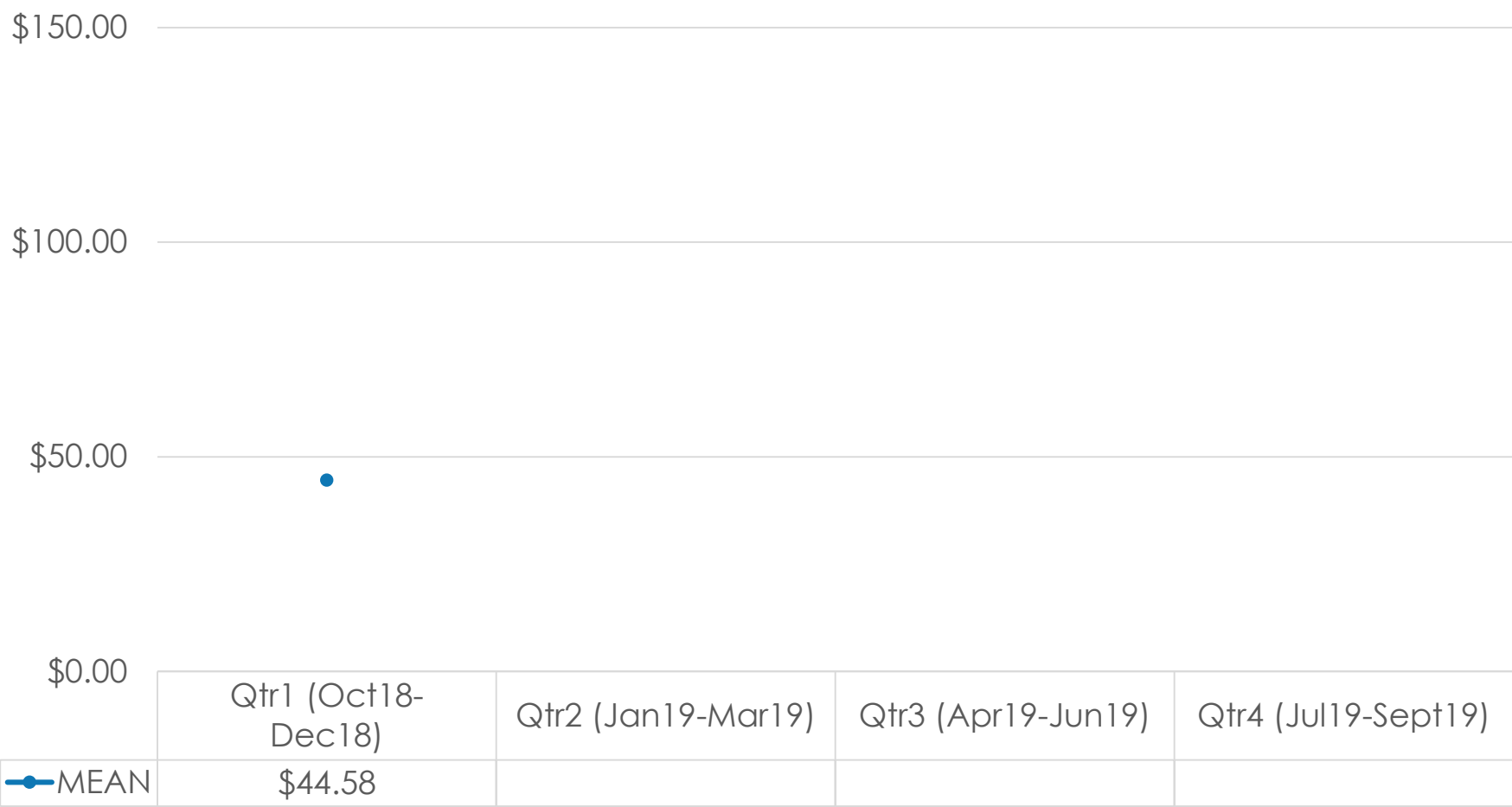


On-Island Expenses by Category – MEAN Entire Travel Party



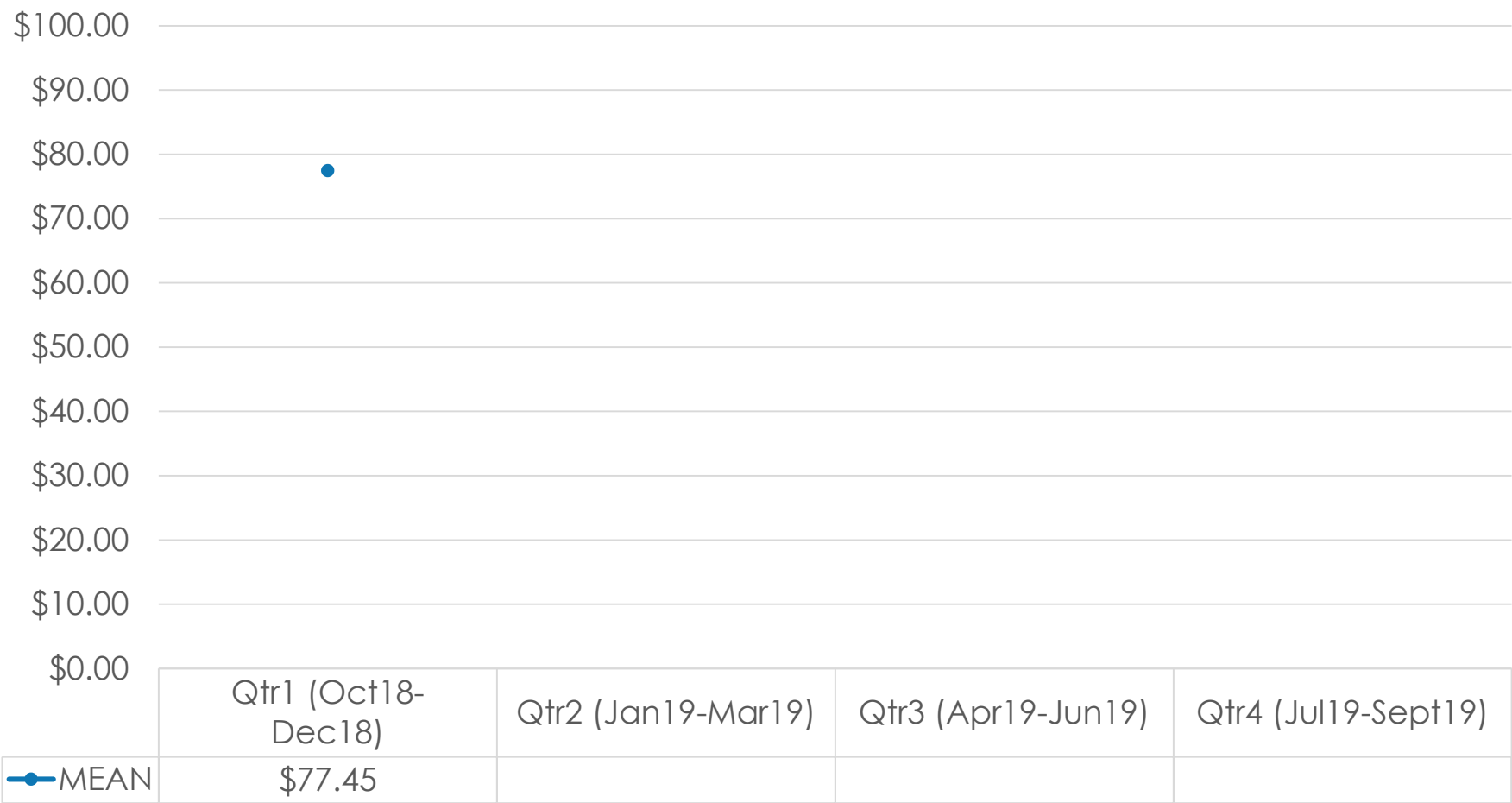
On-Island – FY2019 Tracking

Food & Beverage - Hotel



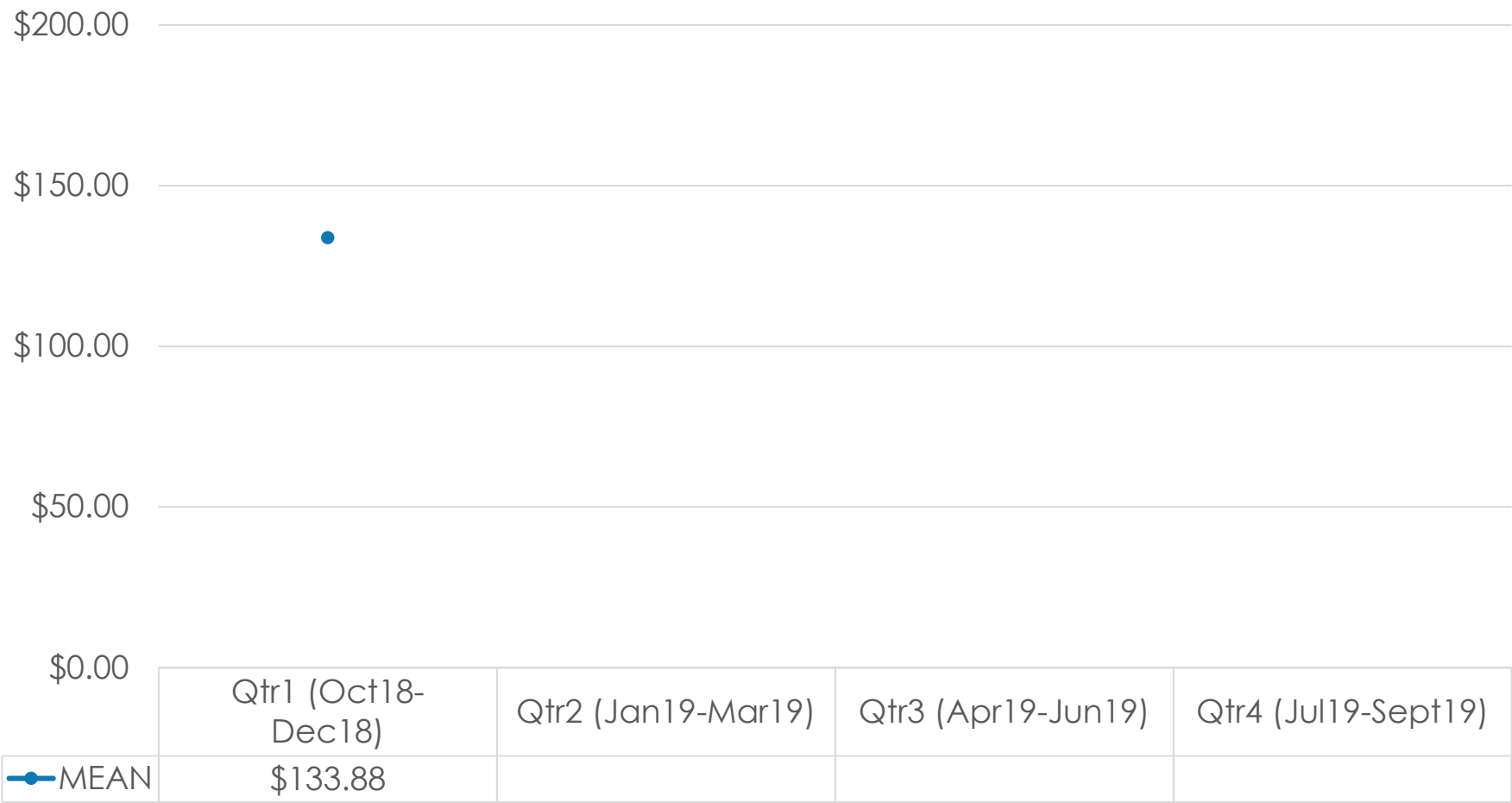
On-Island – FY2019 Tracking

Food & Beverage – Fast Food/ Convenience Store



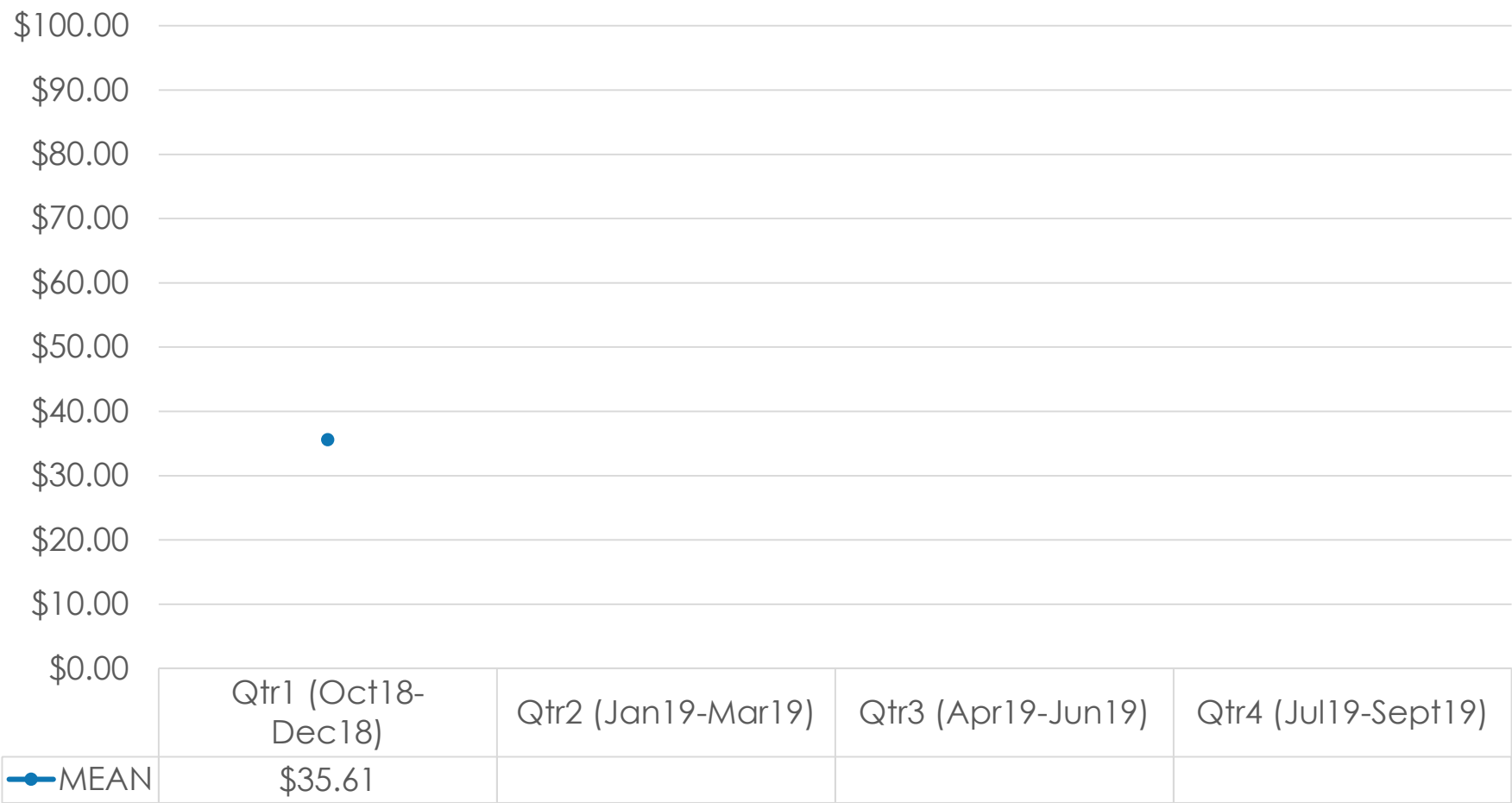
On-Island – FY2019 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



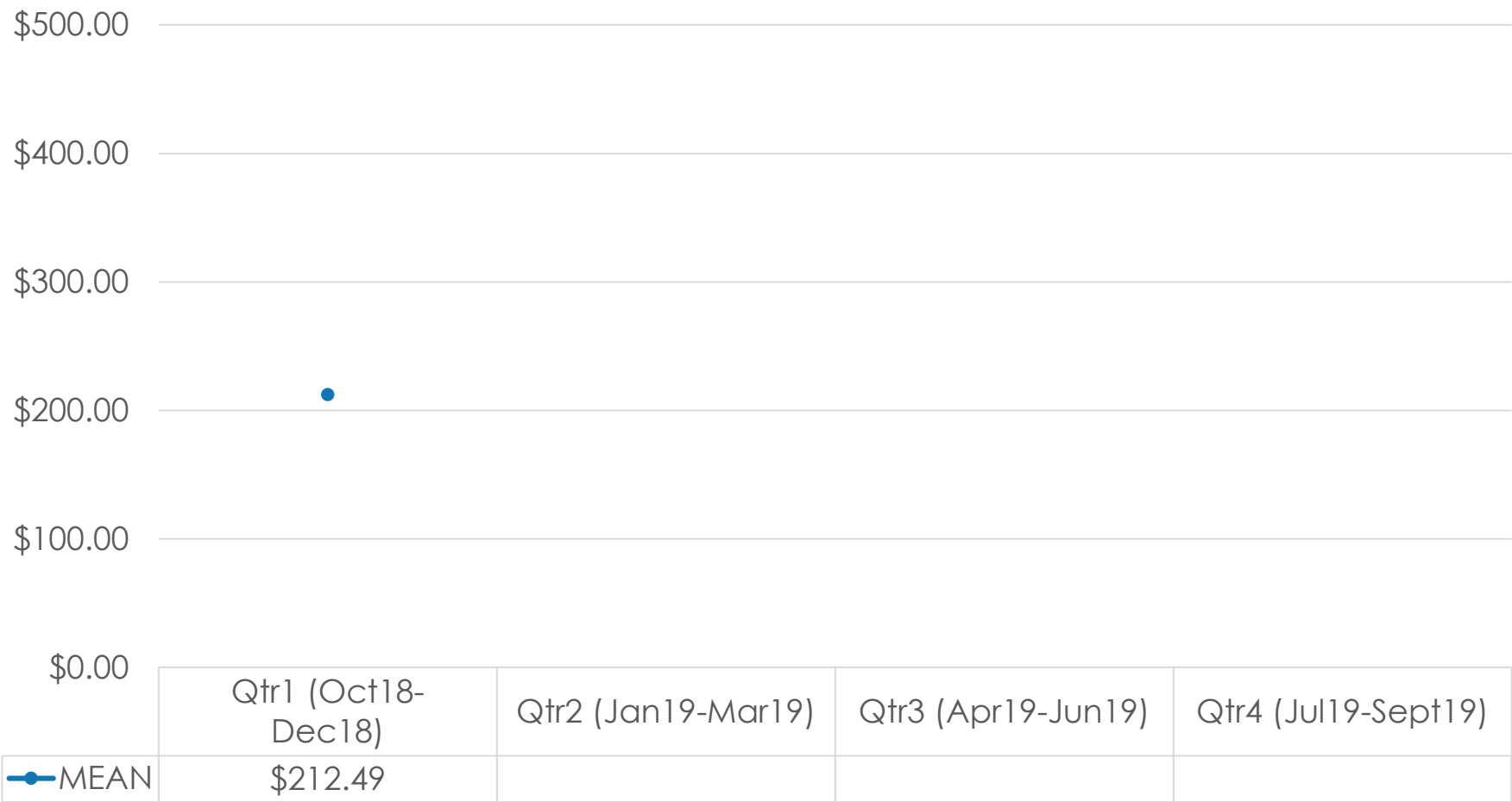
On-Island – FY2019 Tracking

Optional tour/ Activities



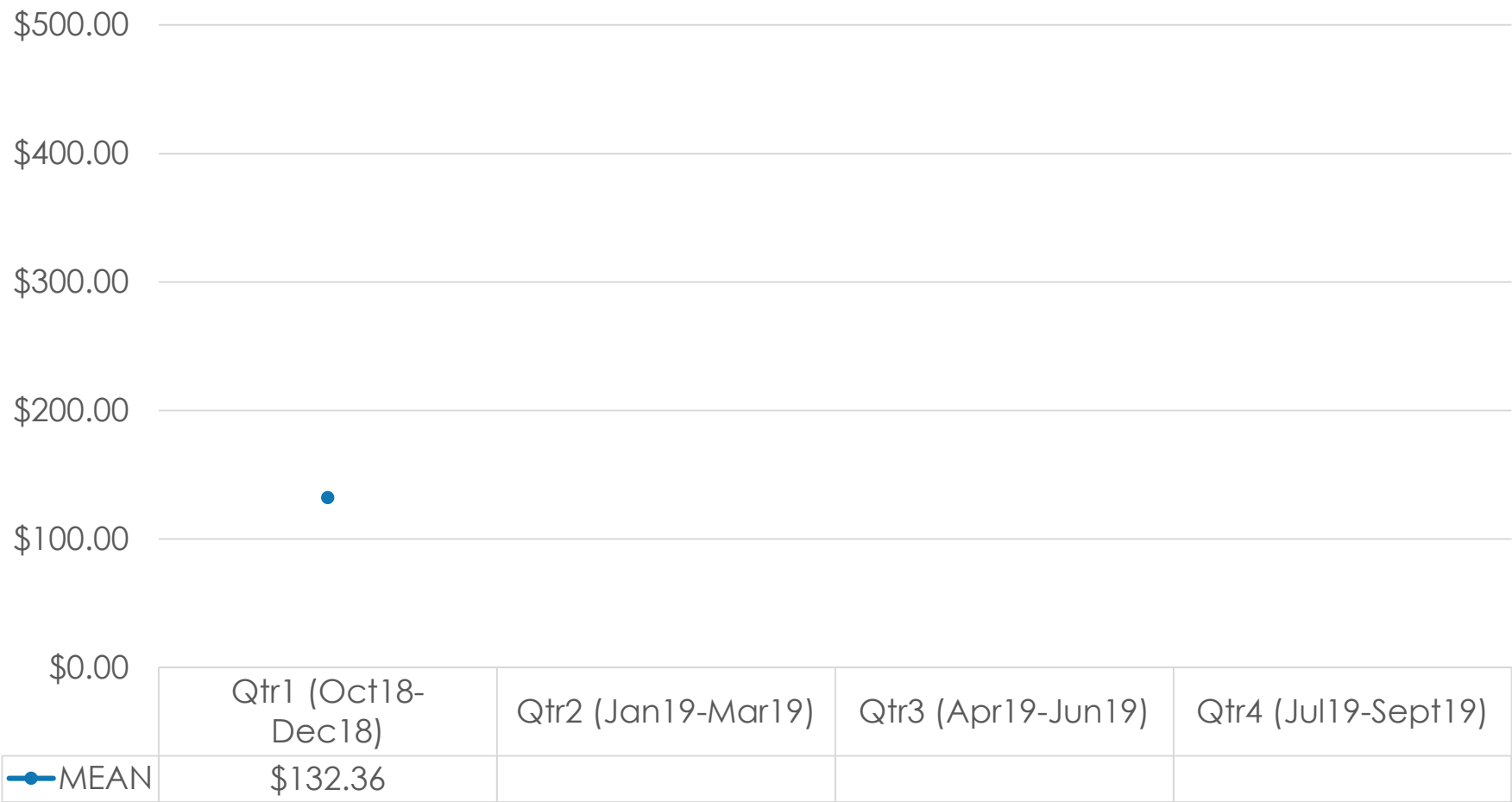
On-Island – FY2019 Tracking

Gift/ Souvenir – Self/ Companion



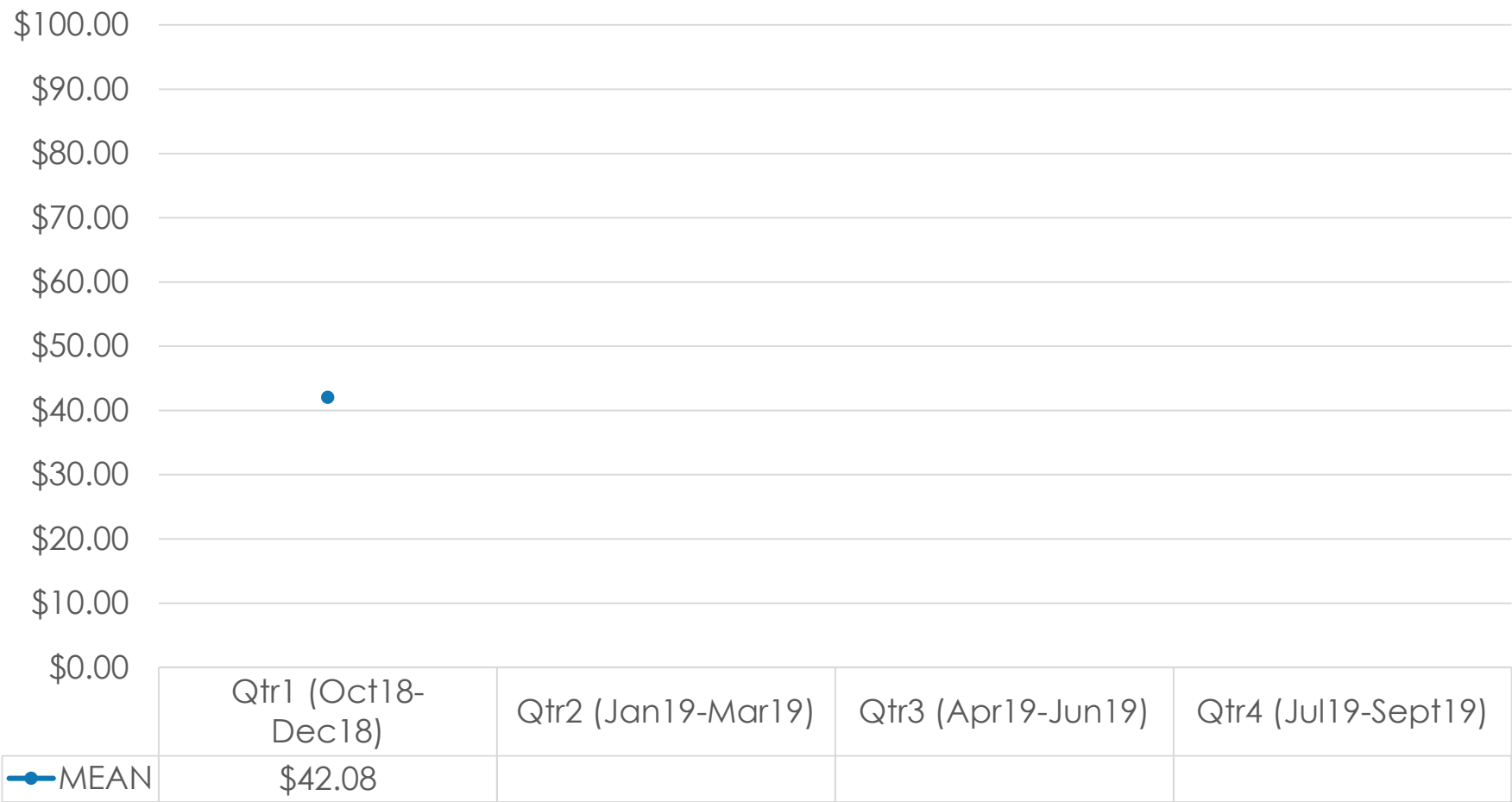
On-Island – FY2019 Tracking

Gift/ Souvenir – Friends/ Family



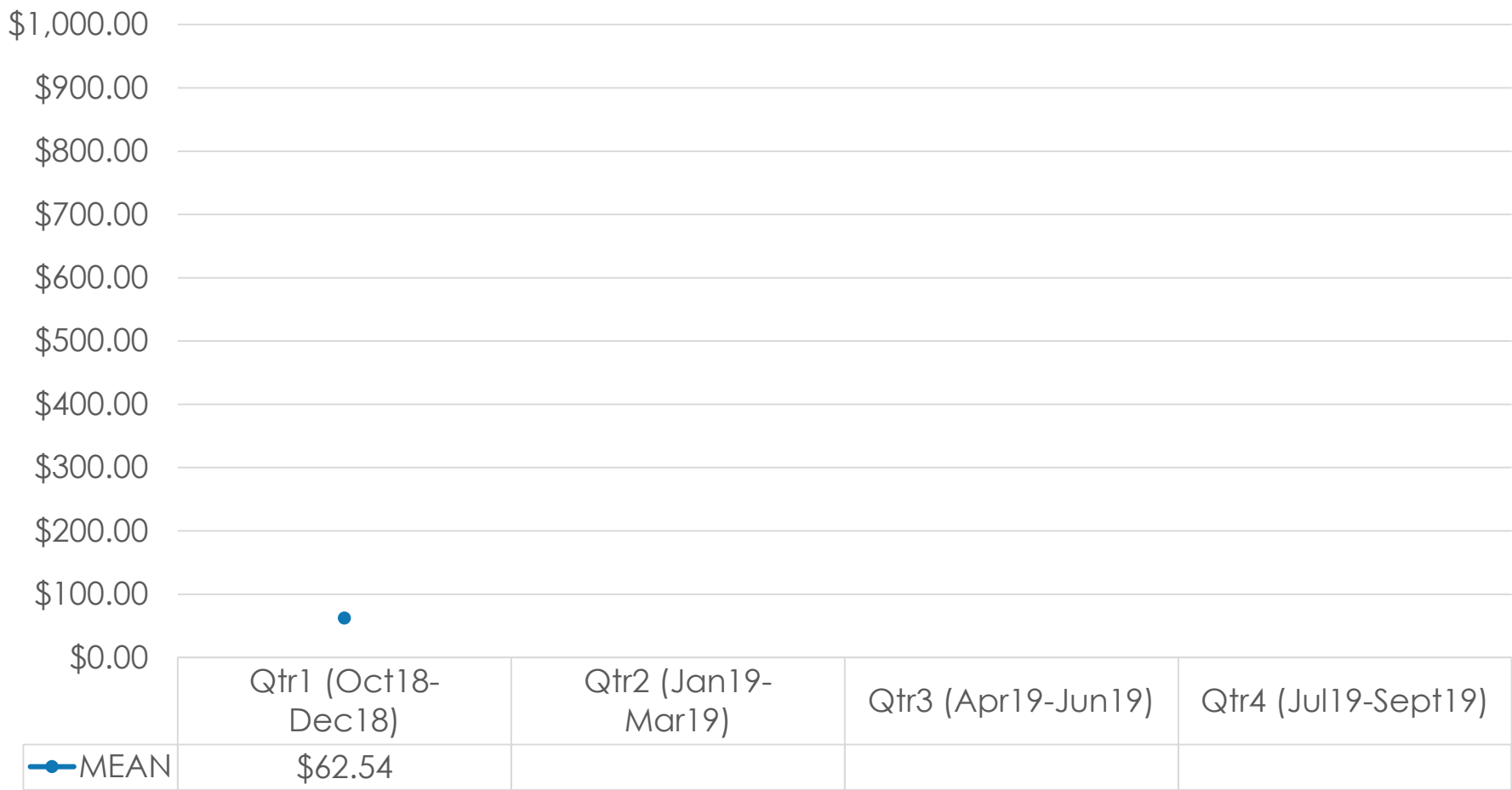
On-Island – FY2019 Tracking

Local Transportation



On-Island – FY2019 Tracking

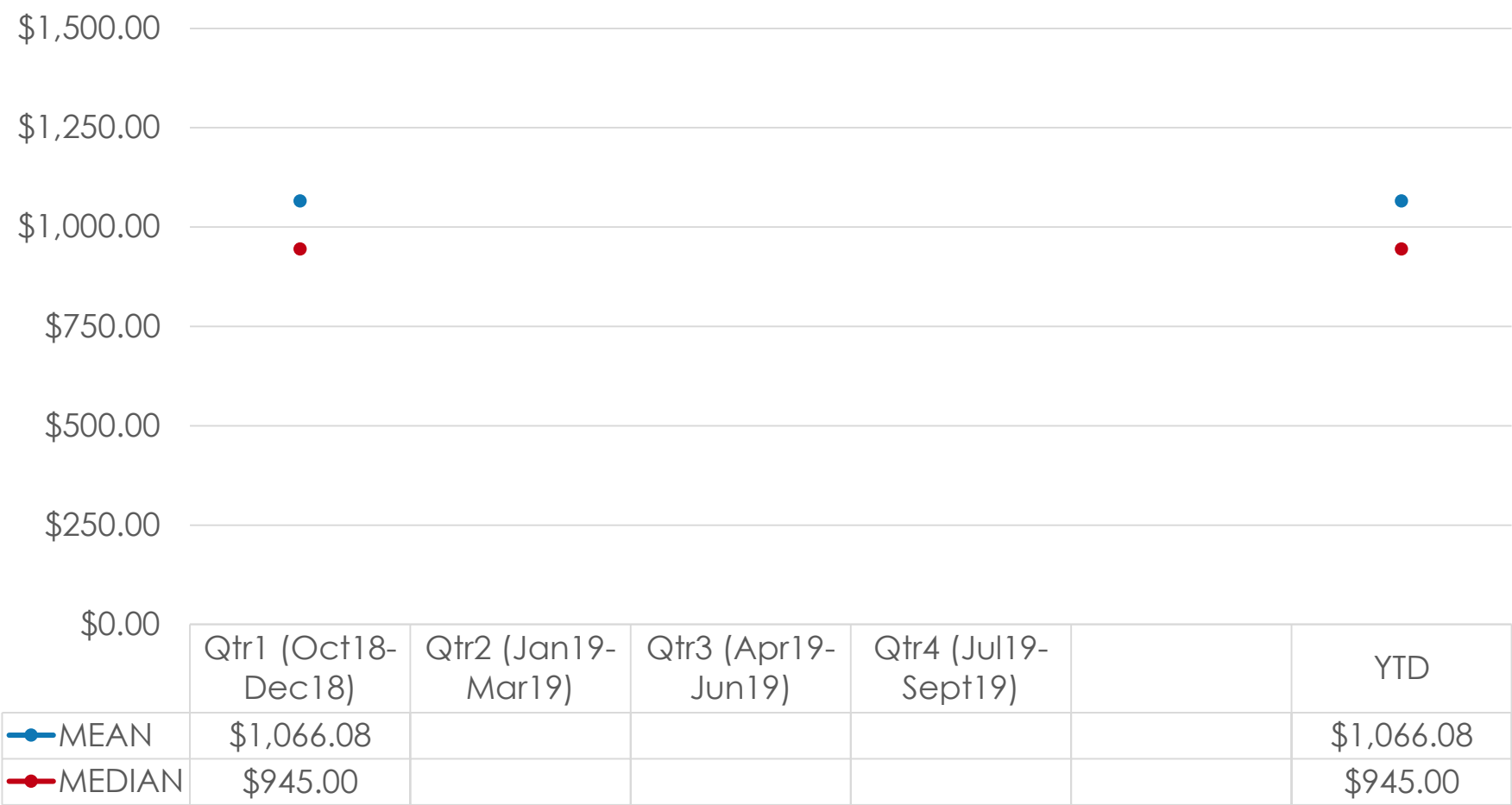
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures

- \$1,066.08 = TOTAL per person overall mean average (prepaid & on-isle) expenditures

TOTAL Per Person Expenditures – FY2019 Tracking



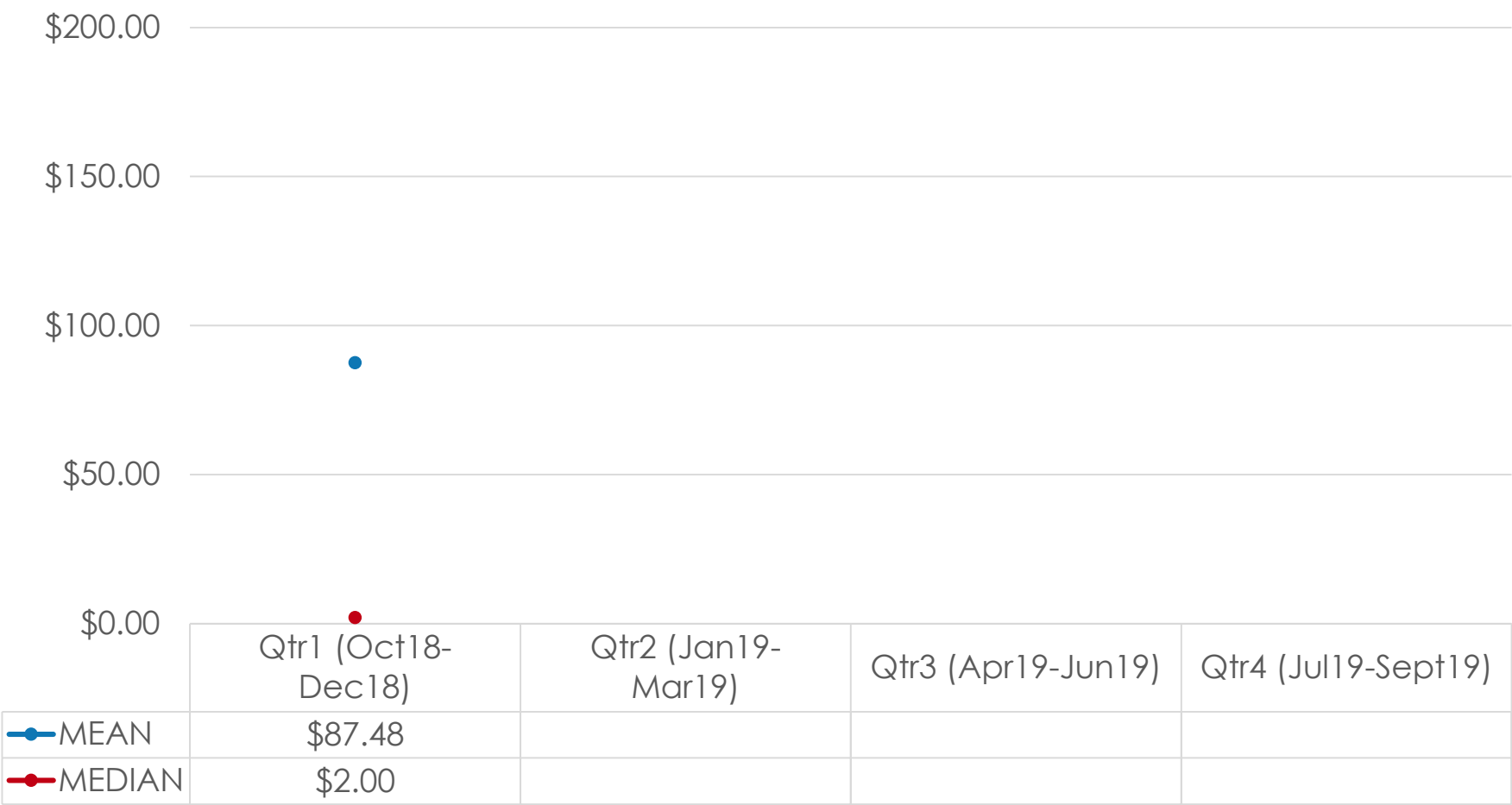
TOTAL Per Person Expenditures – Key Segments

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

		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
TOTAL PP	Mean	\$1,066.08	\$760.18	\$1,089.96	\$1,094.77	\$1,040.93
	Median	\$945	\$642	\$970	\$967	\$920

Prepared by Anthology Research

GUAM AIRPORT EXPENDITURE – FY2019 Tracking

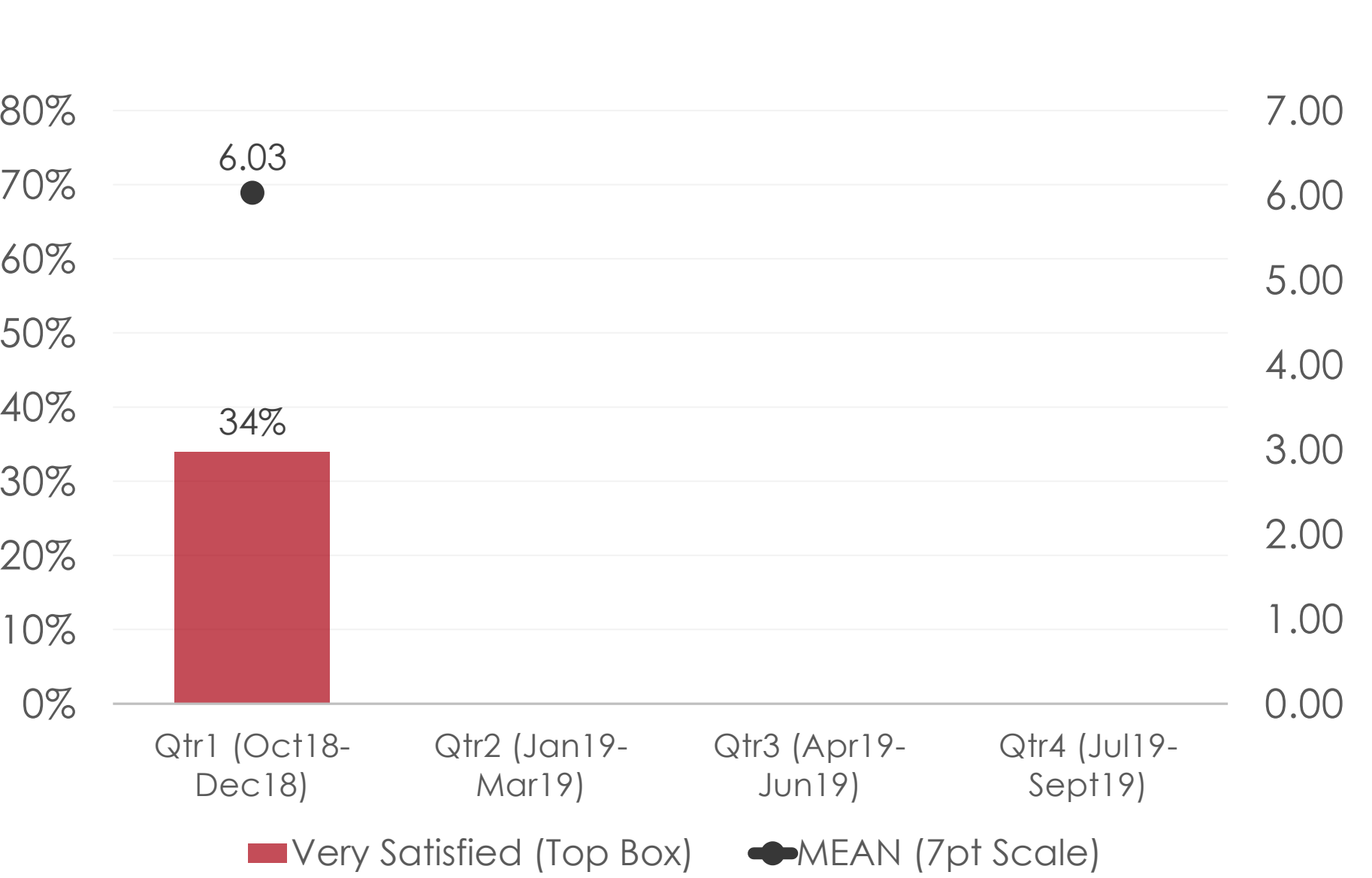


SECTION 4

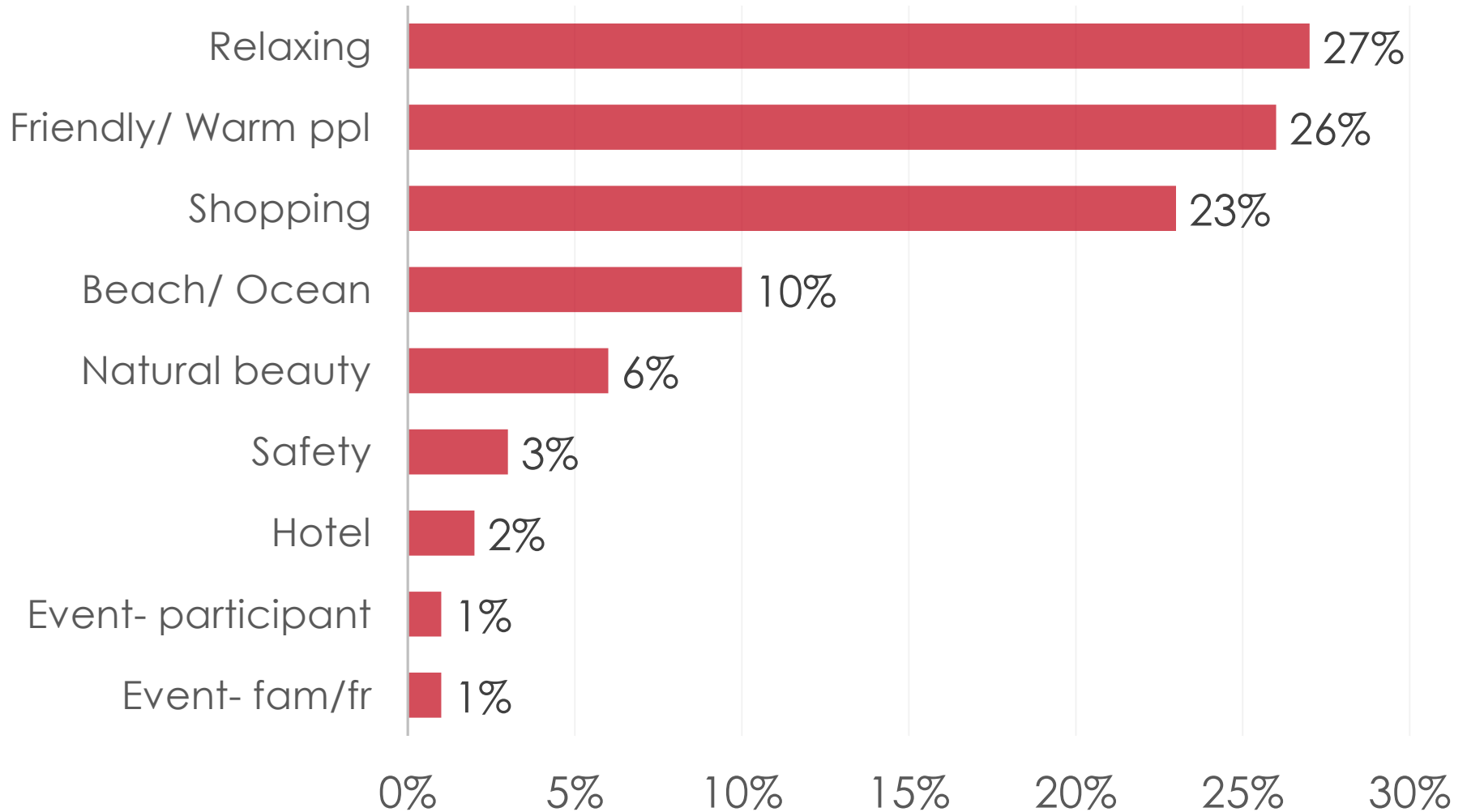
VISITOR SATISFACTION

BEHAVIOR

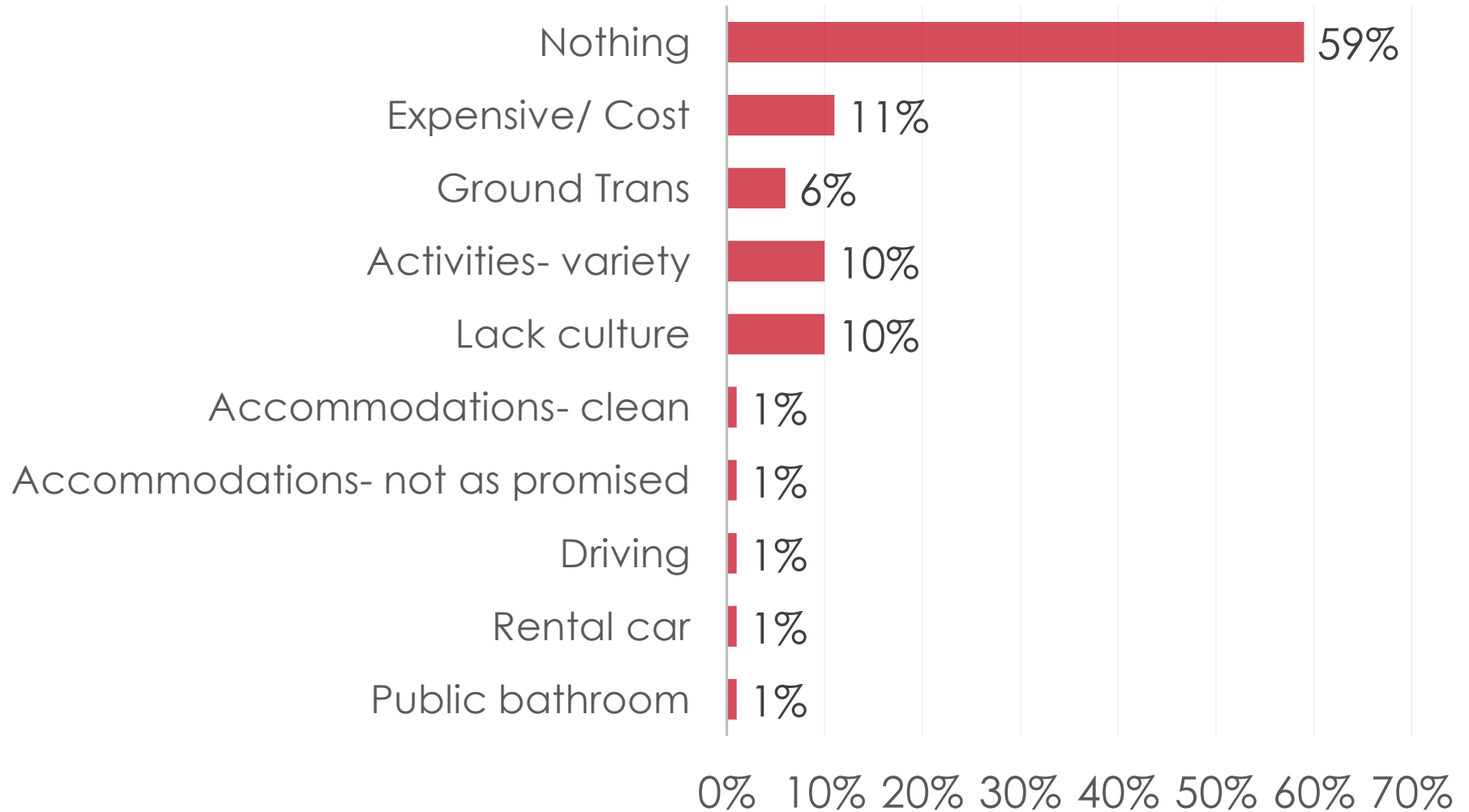
OVERALL SATISFACTION



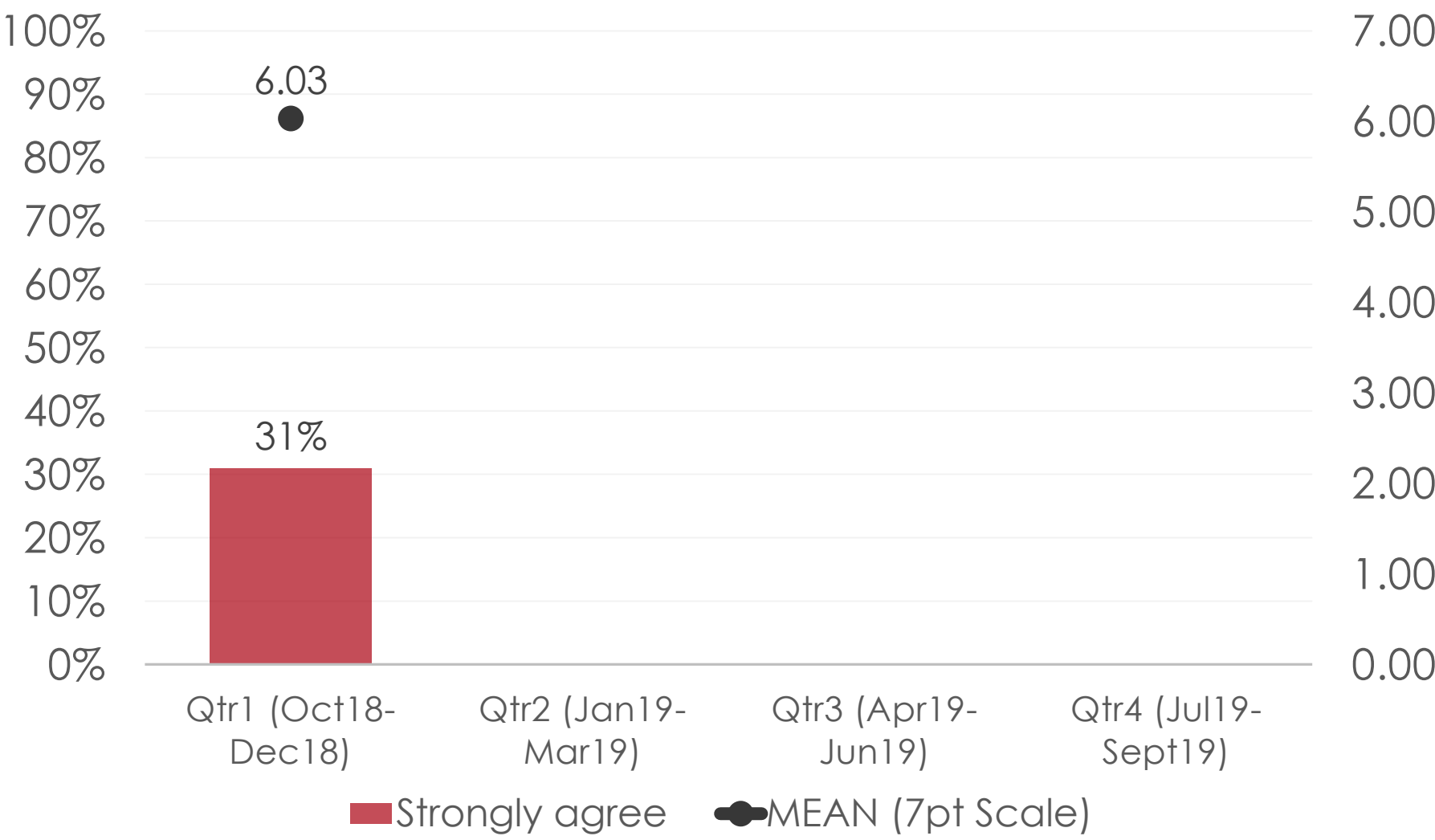
Positive Aspect of Trip



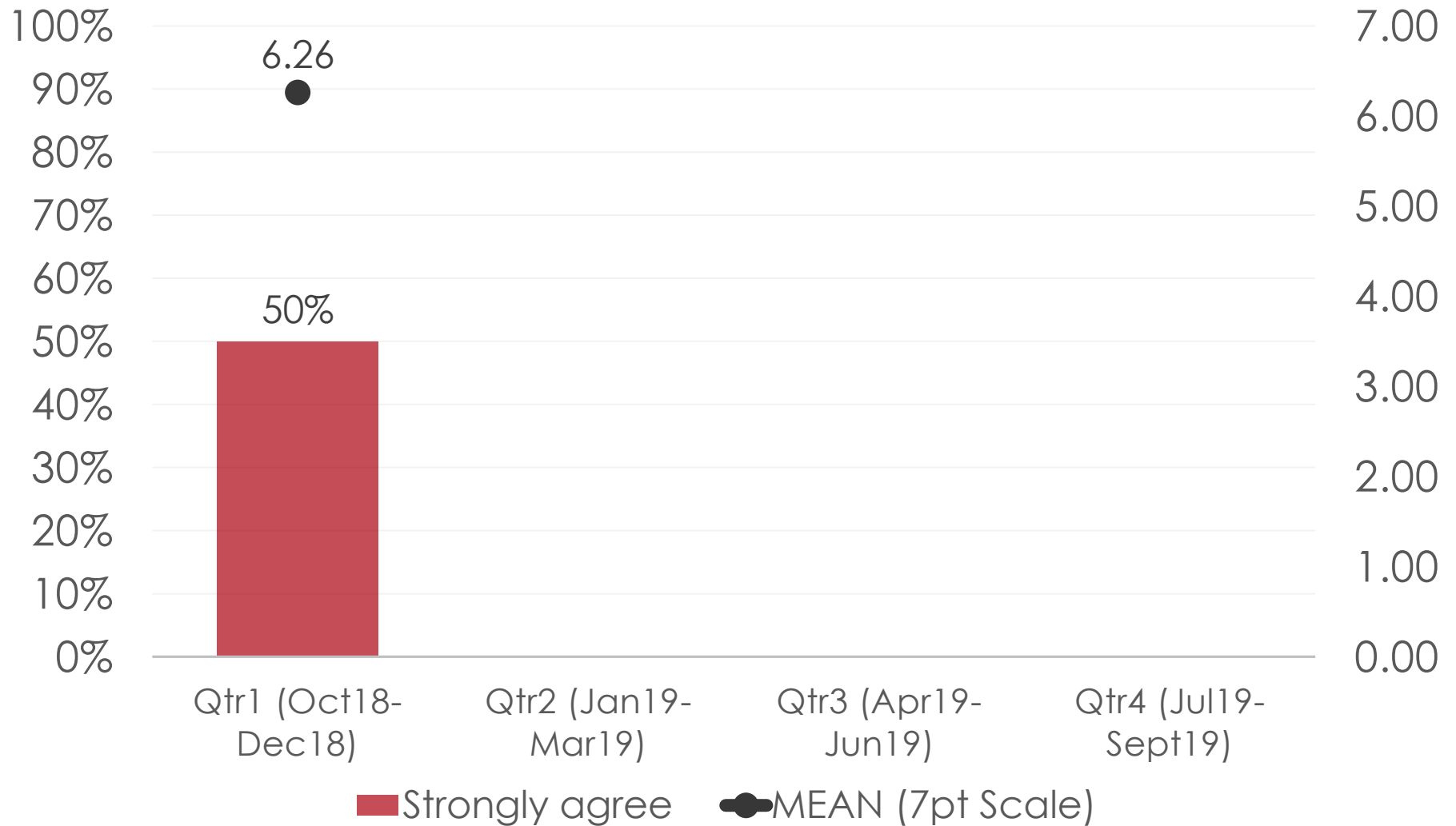
Negative Aspect of Trip



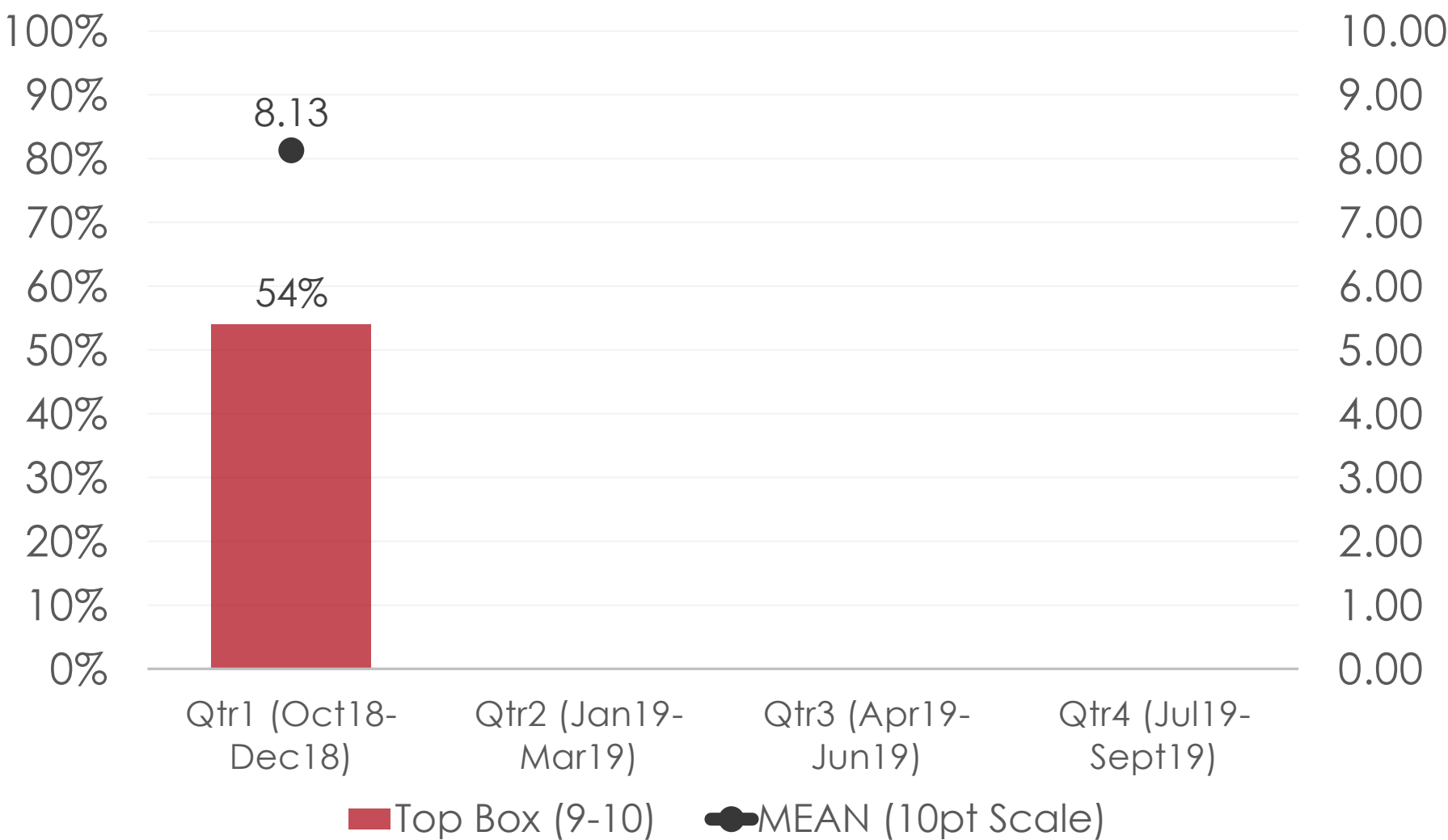
Guam was better than expected



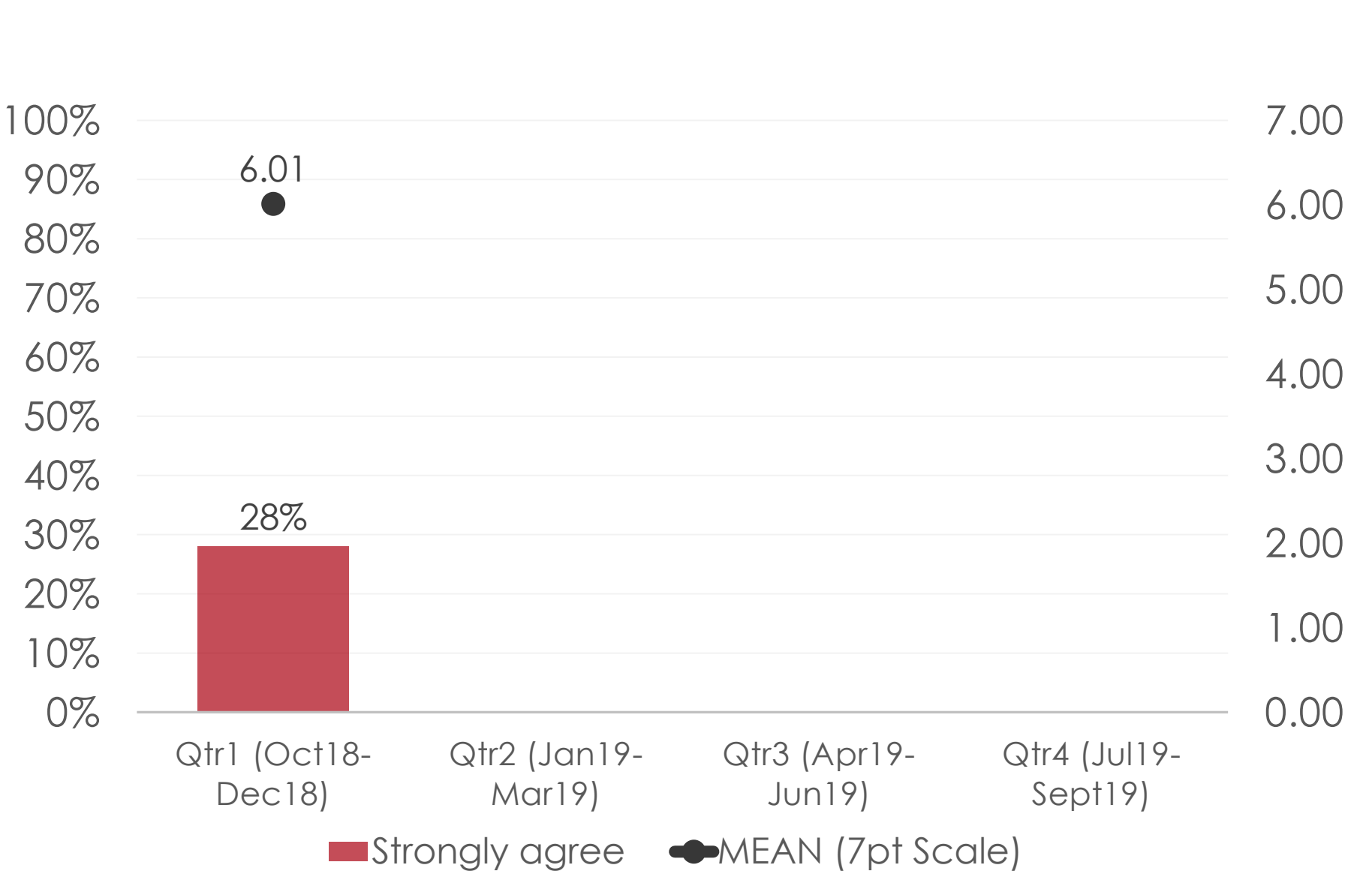
I had no communication problems



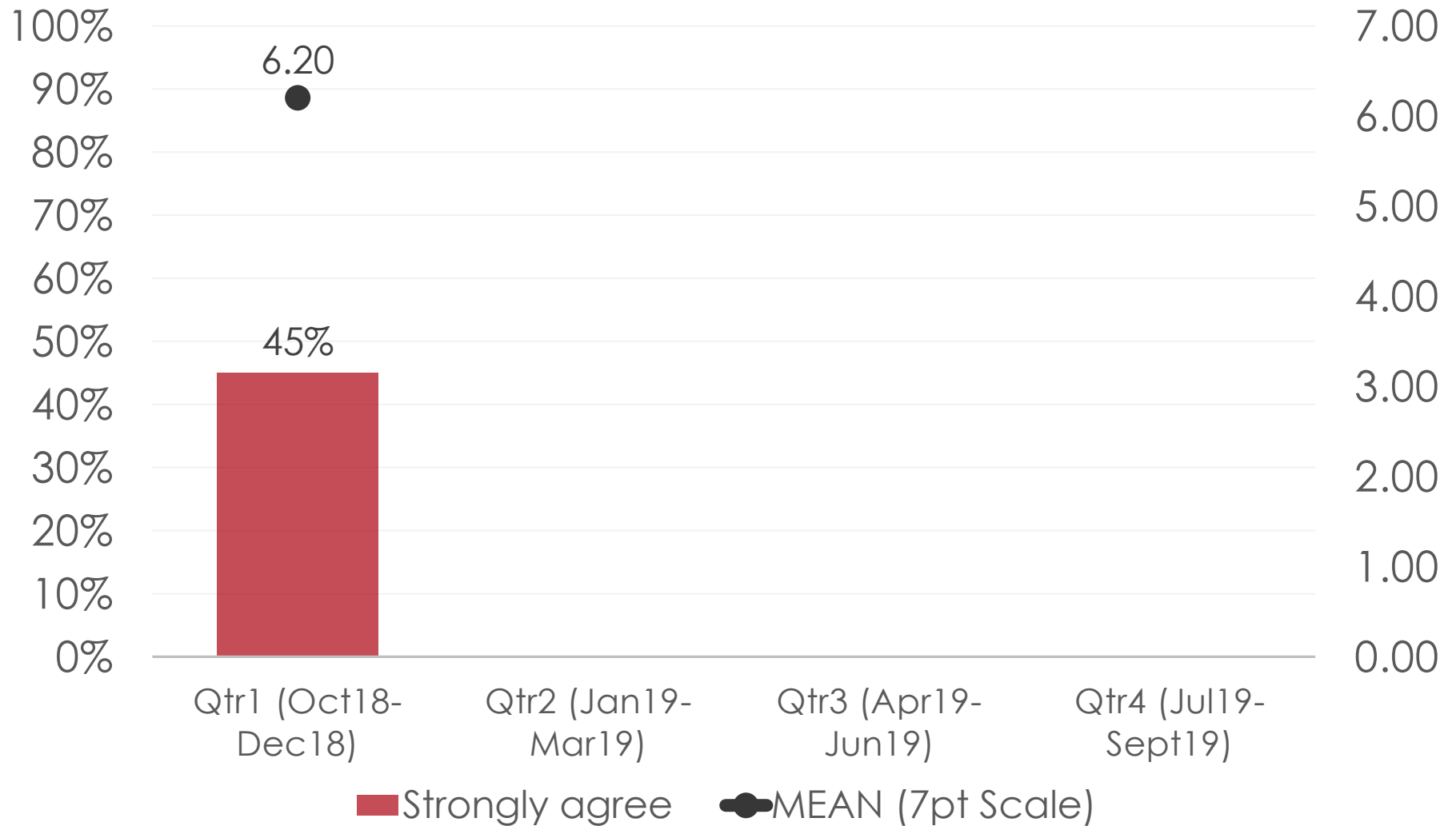
I will recommend Guam to family and friends (10pt scale)



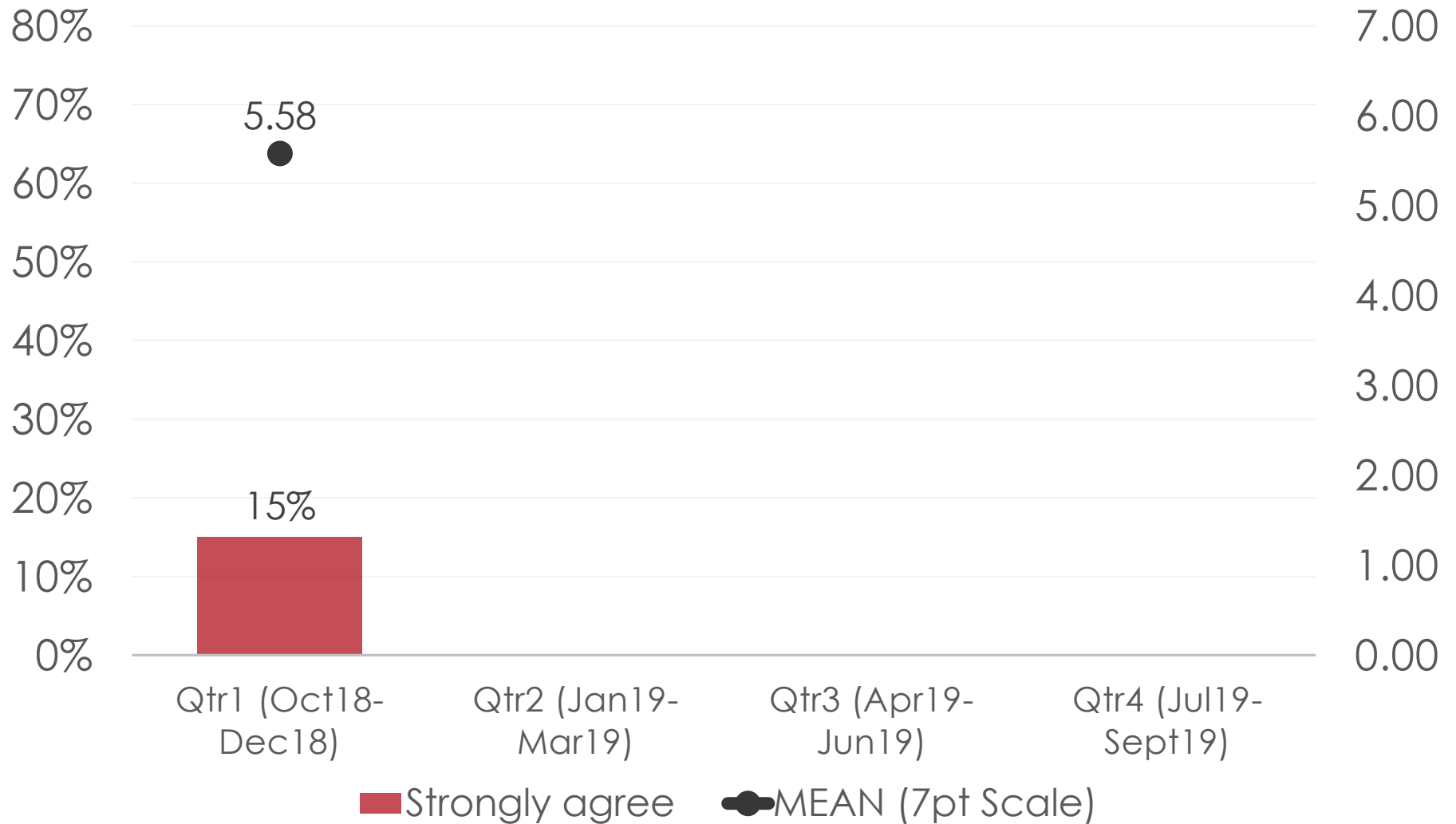
Sites on Guam were attractive



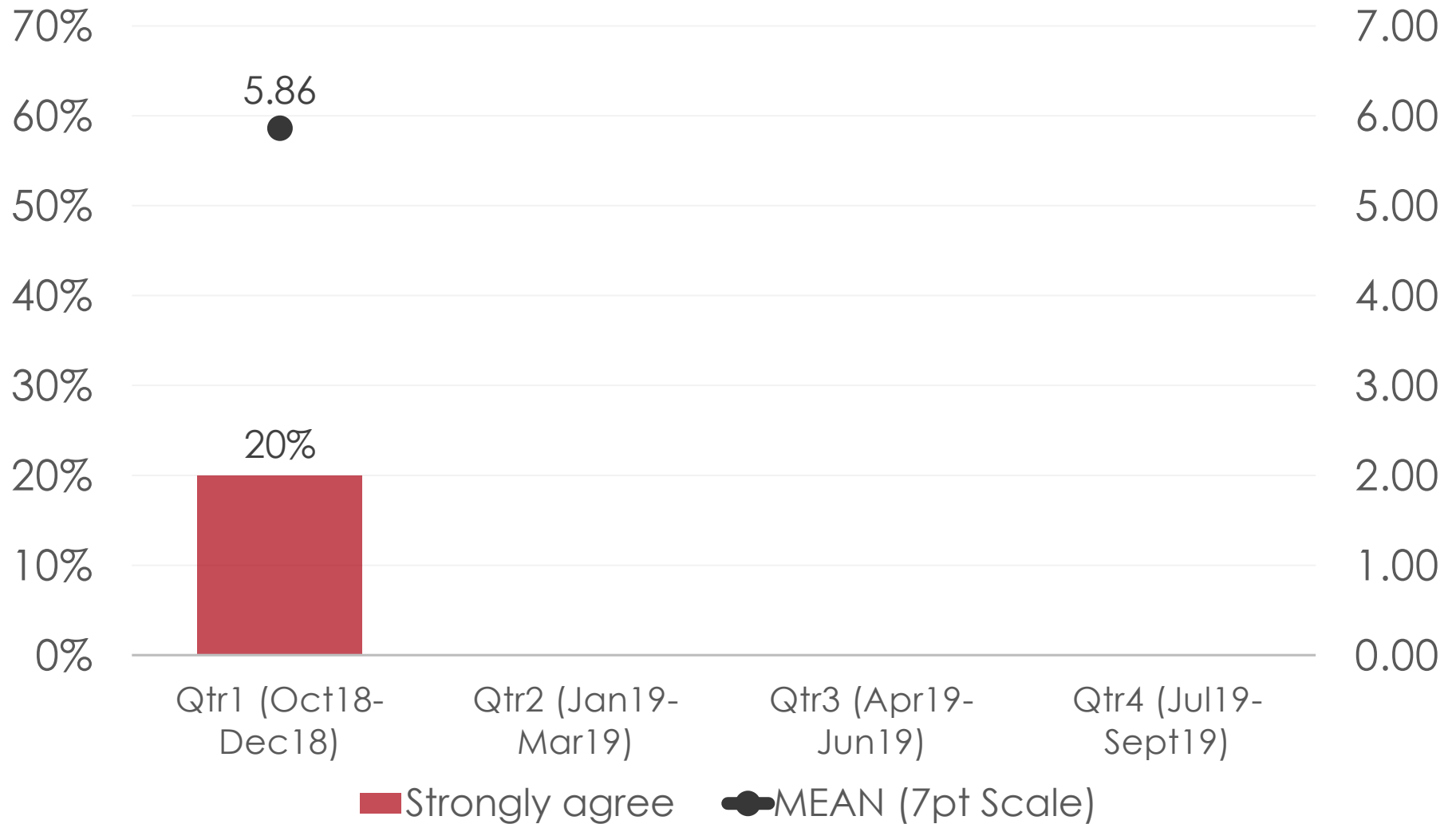
I plan to visit Guam again



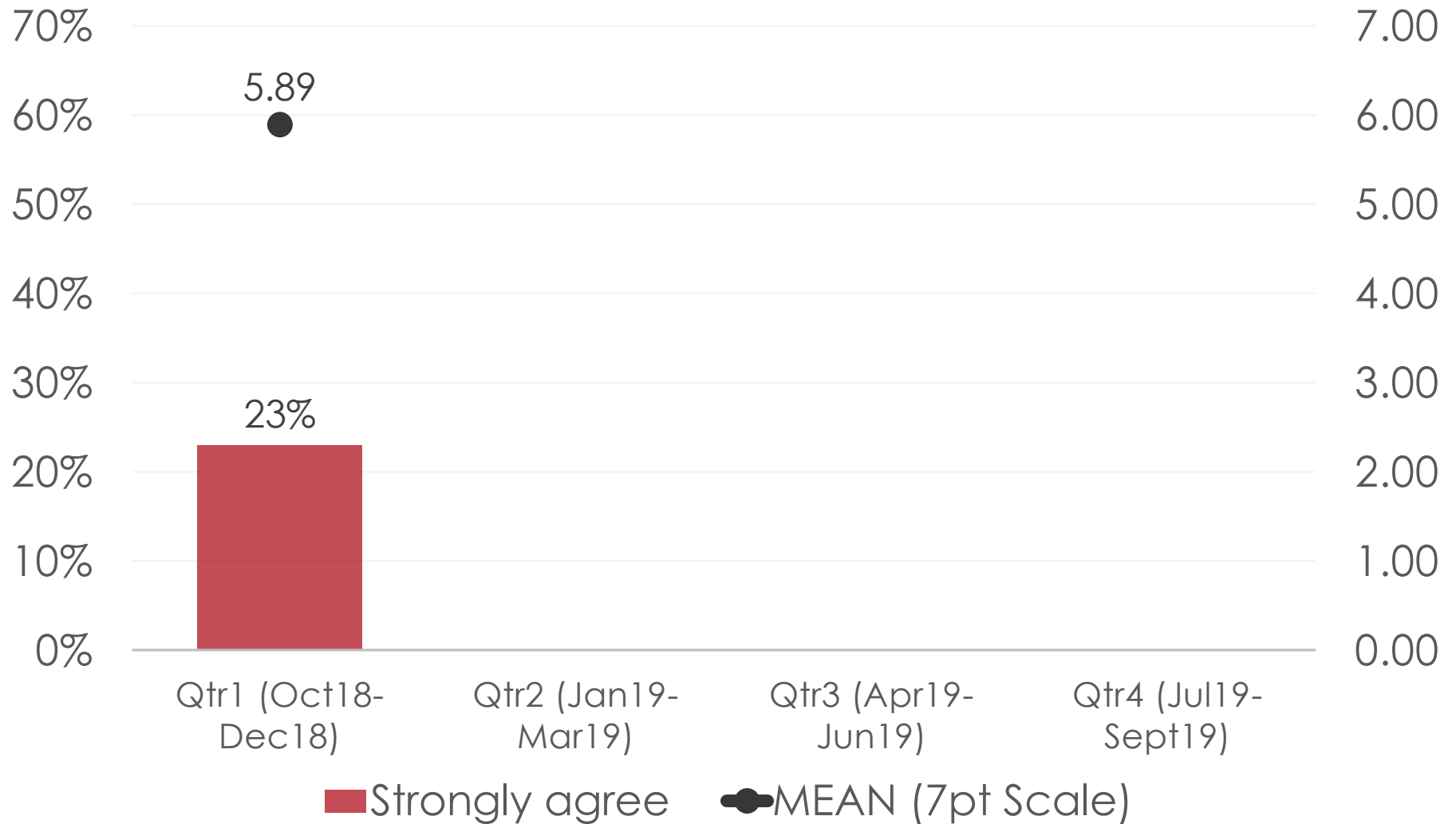
Not enough night time activities



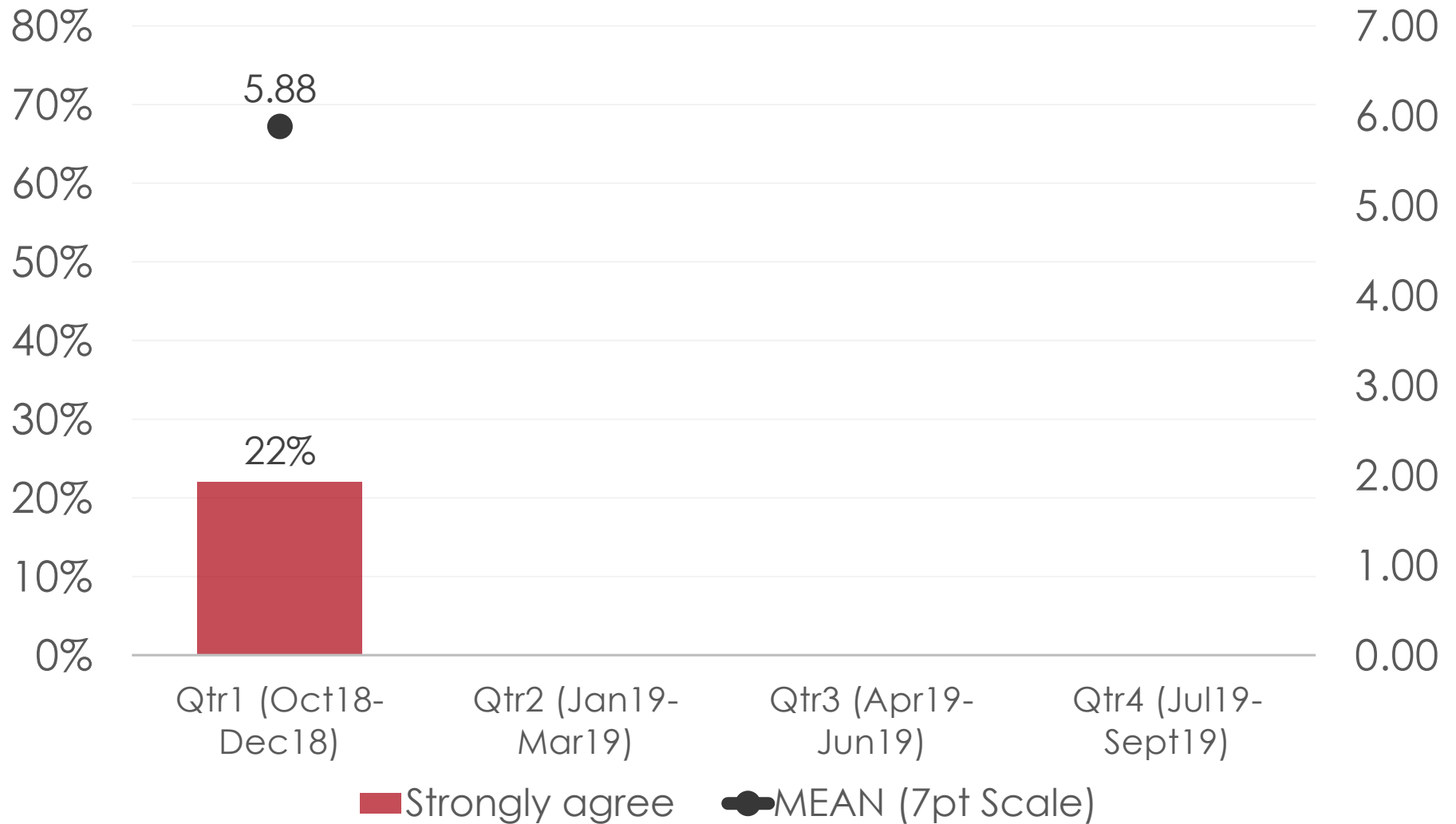
Tour guides were professional



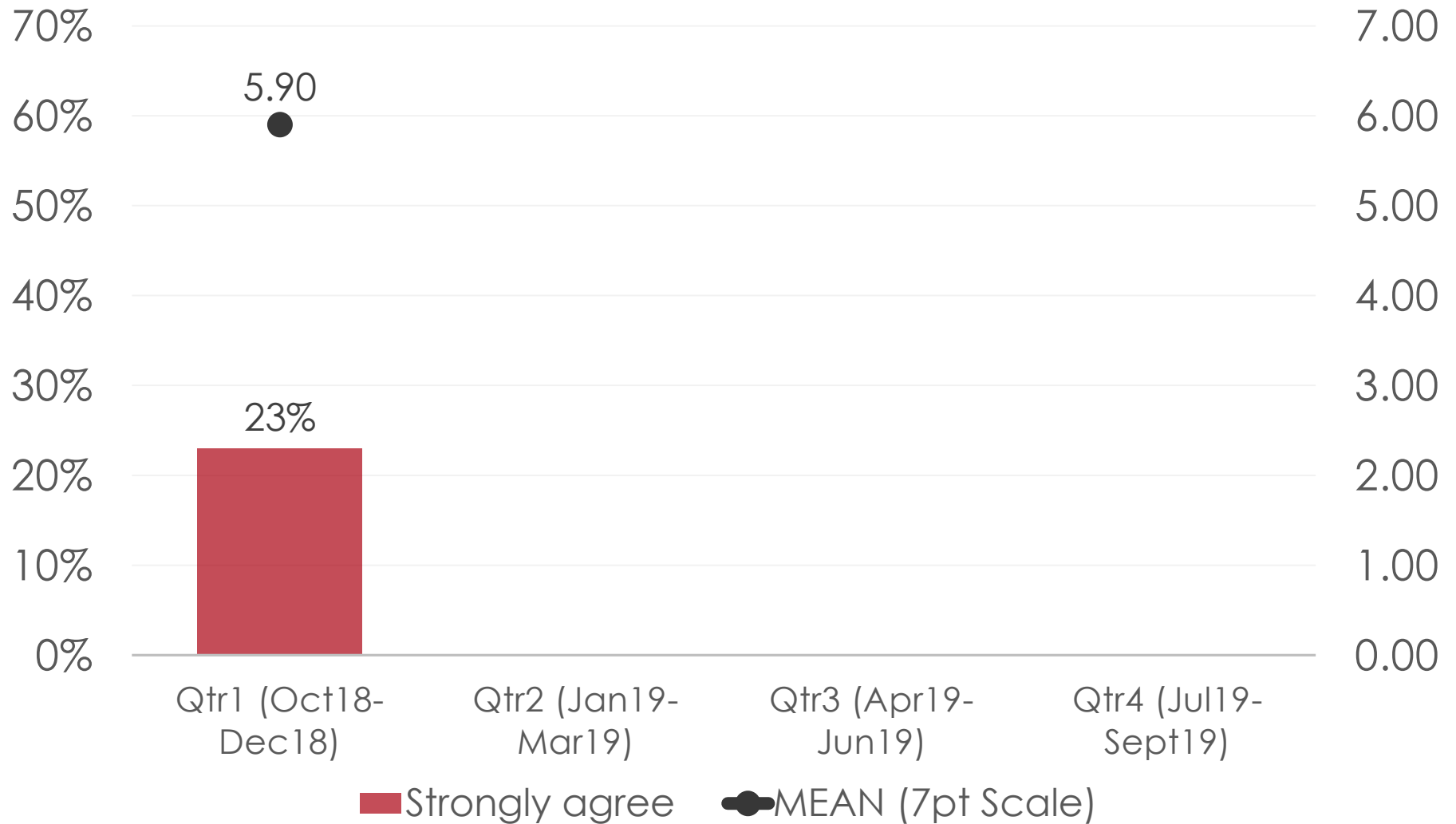
Tour drivers were professional



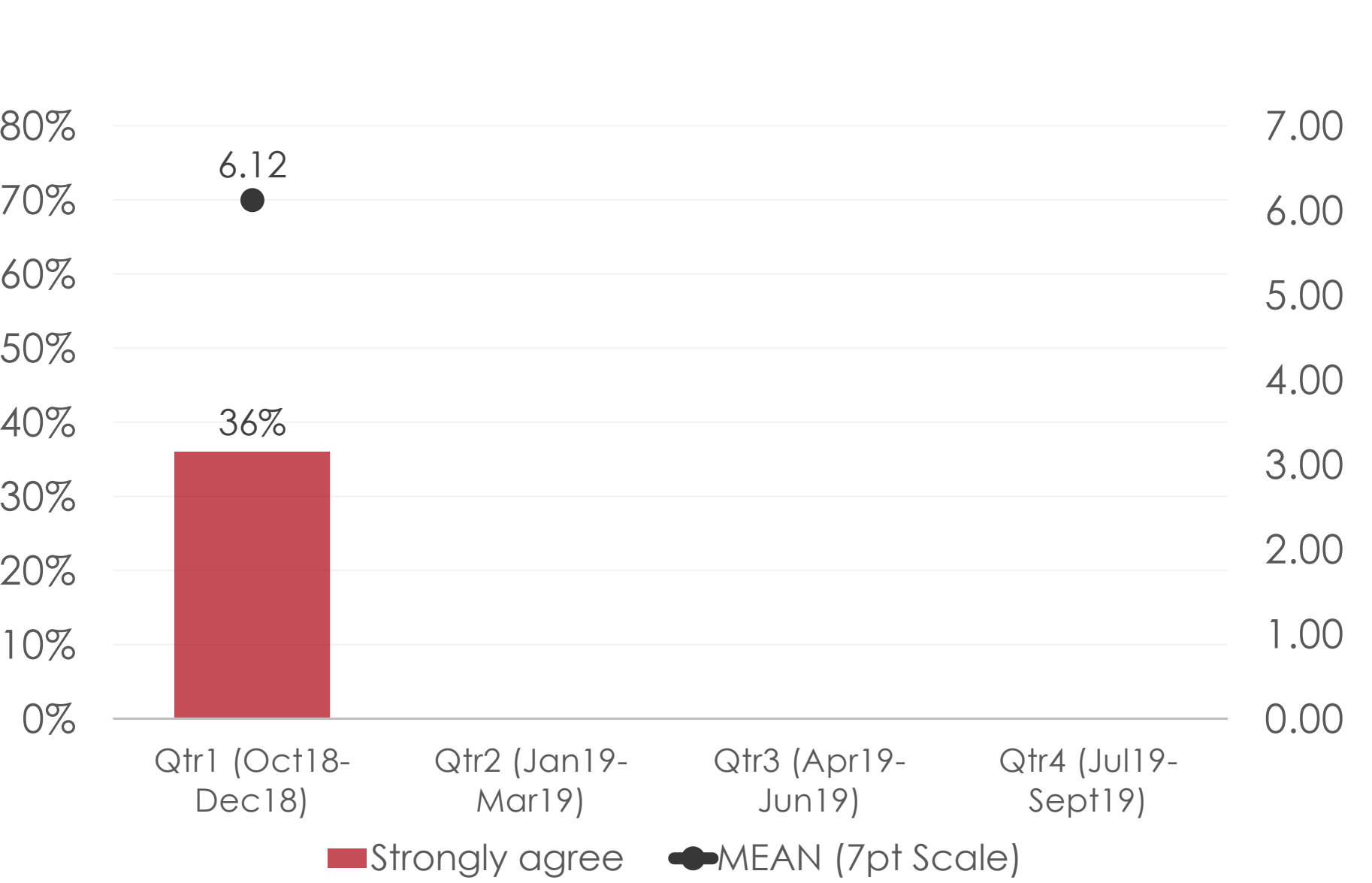
Taxi drivers were professional



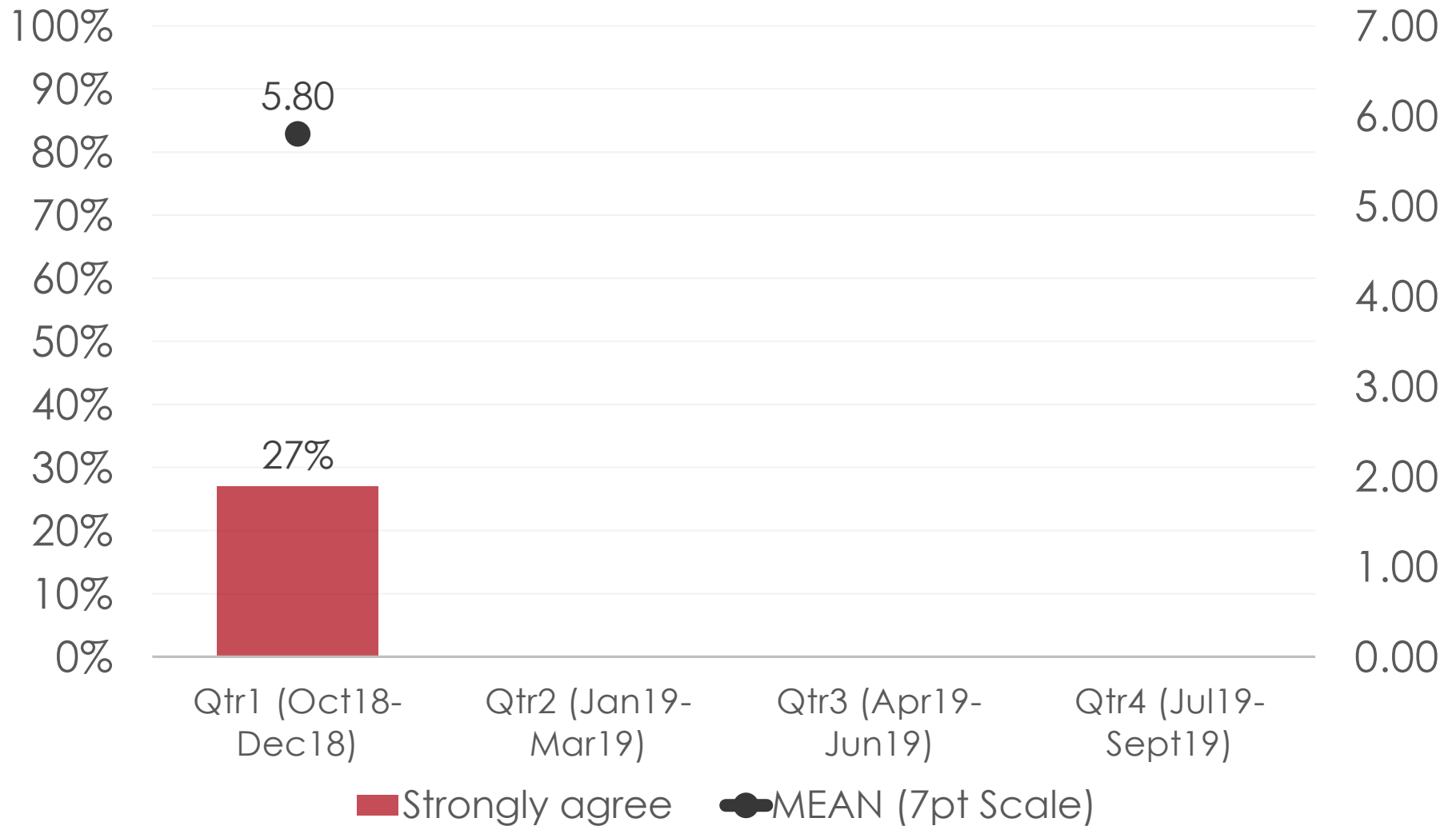
Taxis were clean



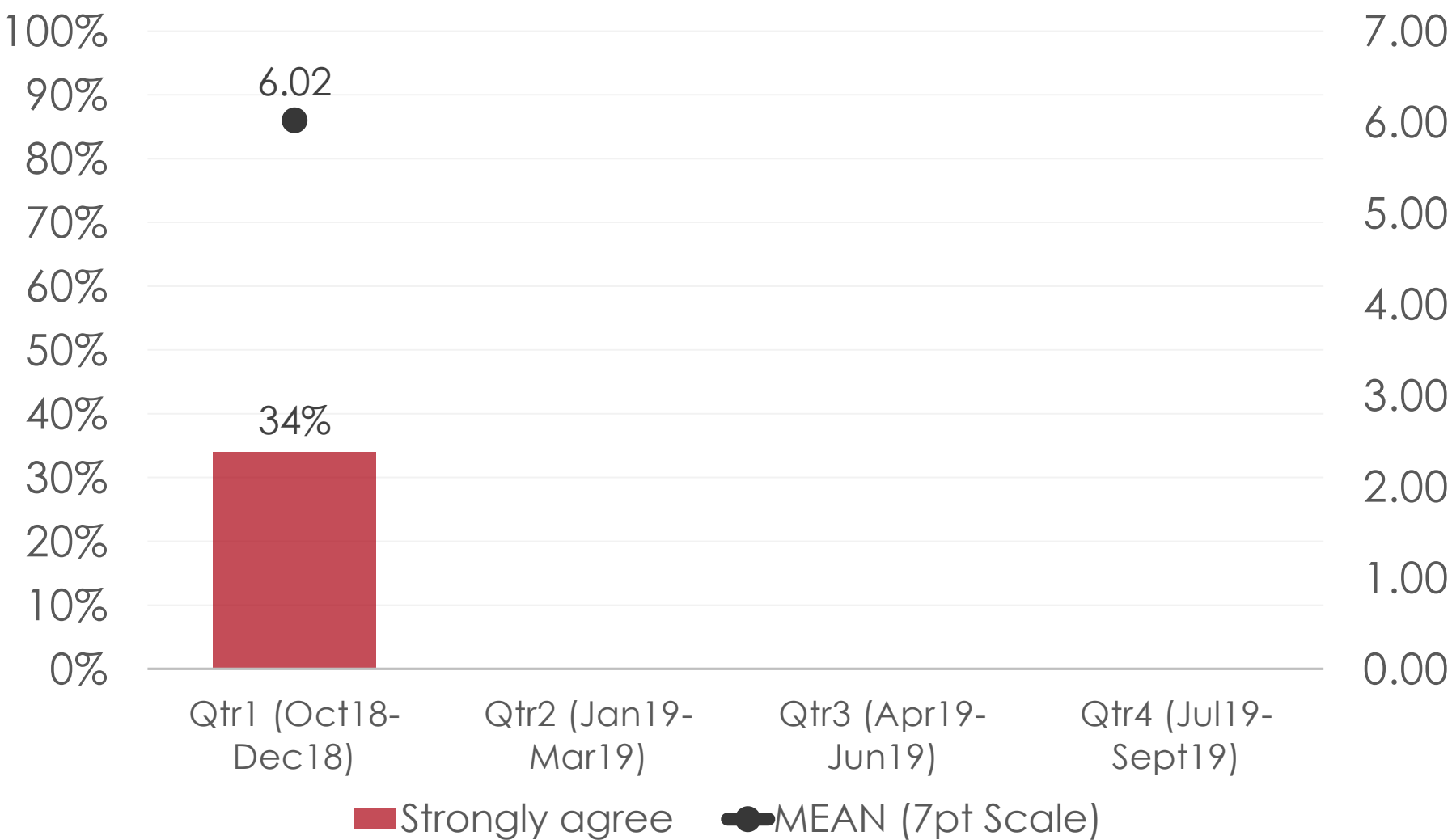
Guam airport was clean



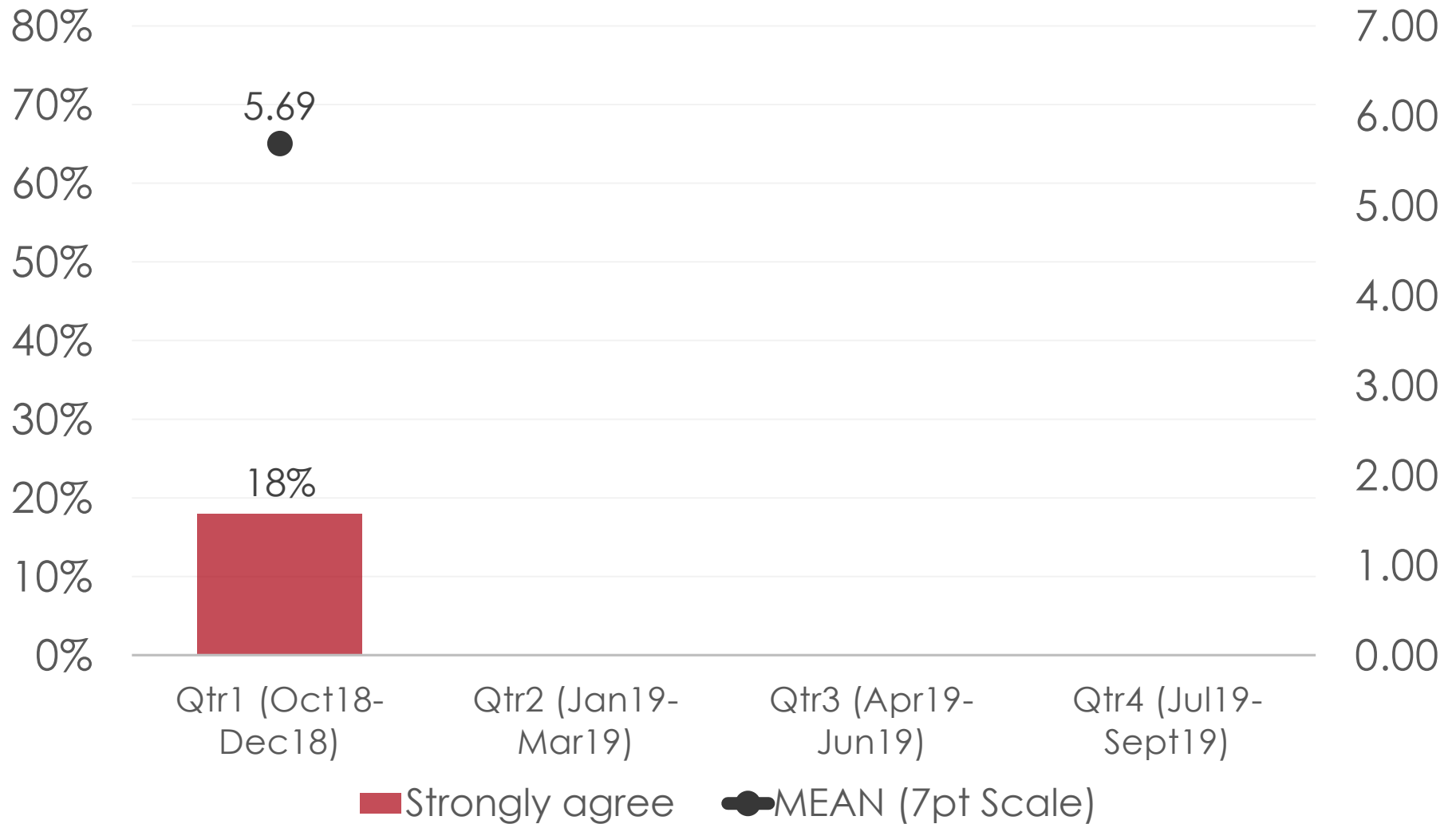
Ease of getting around



Safety walking around at night

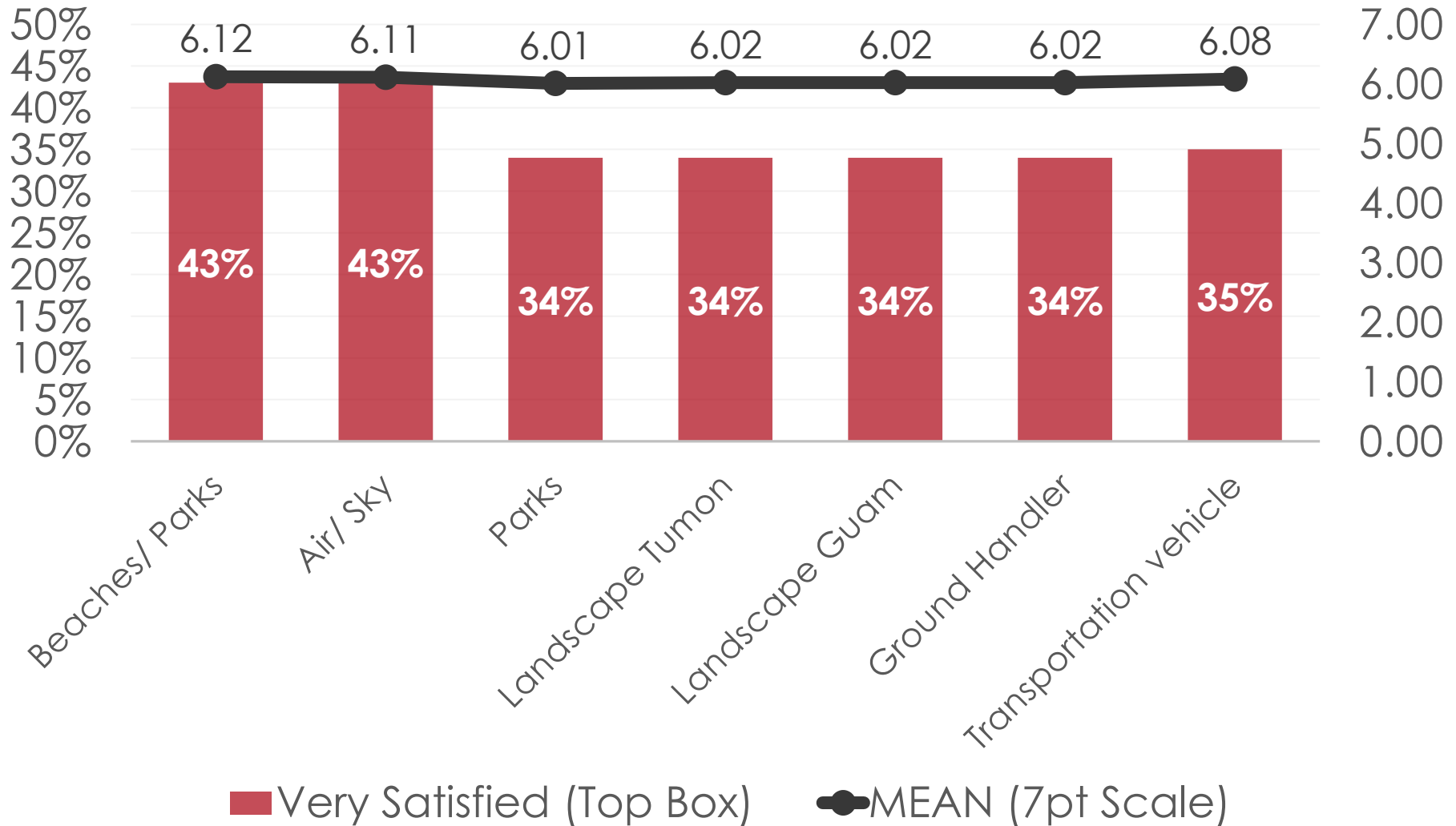


Price of things on Guam

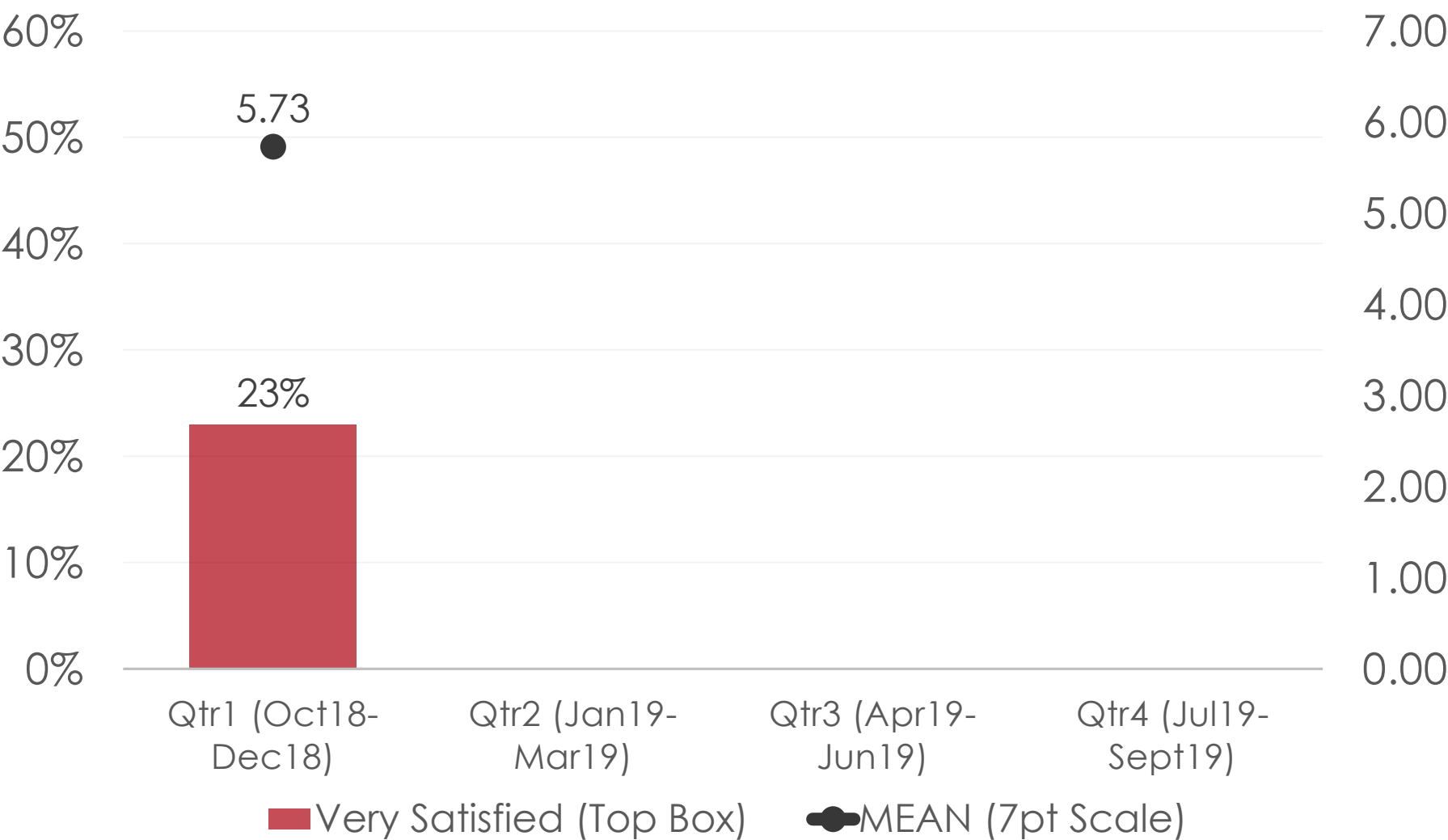


GENERAL SATISFACTION –

Quality/ Cleanliness

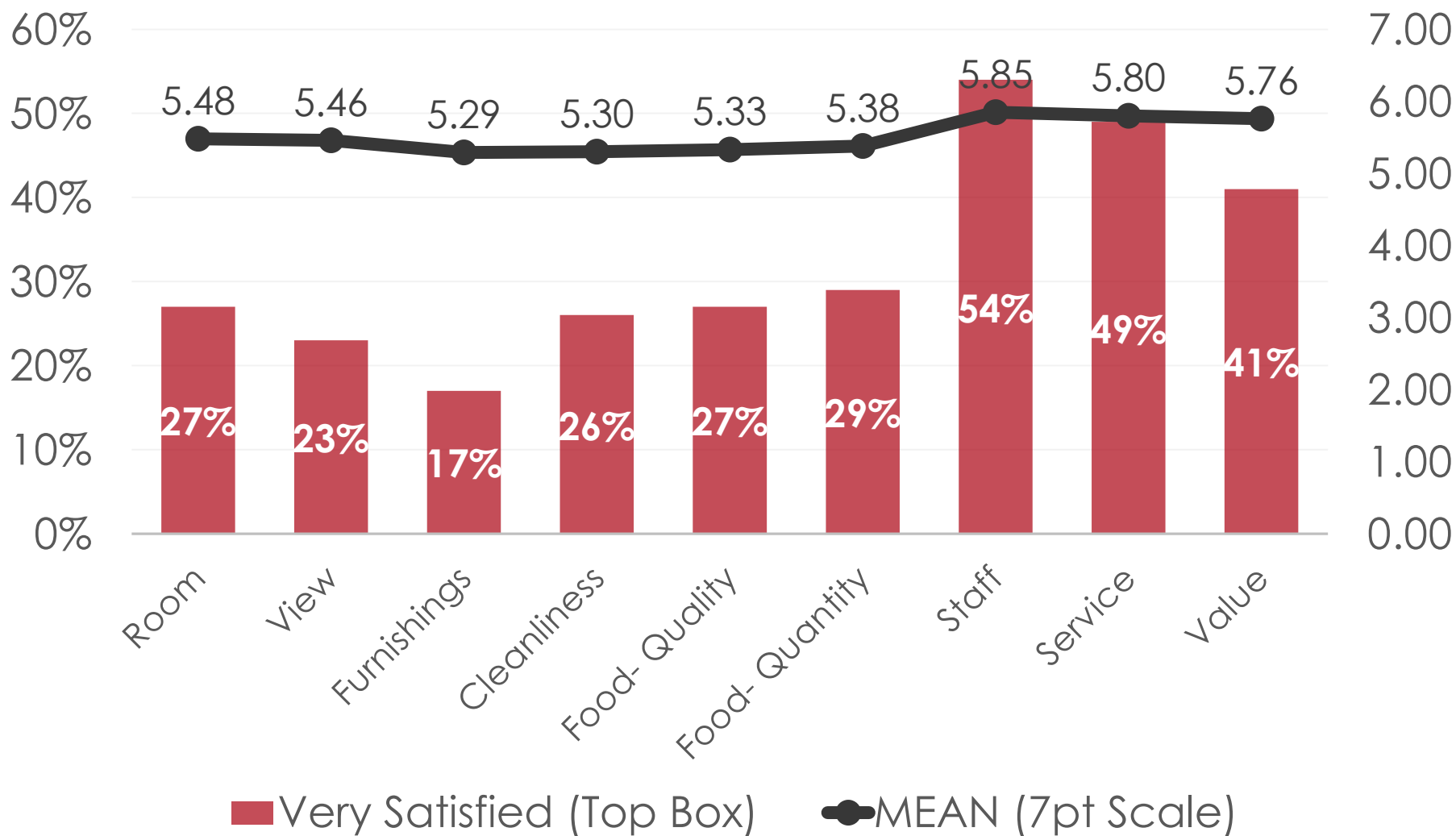


ACCOMMODATIONS – OVERALL SATISFACTION

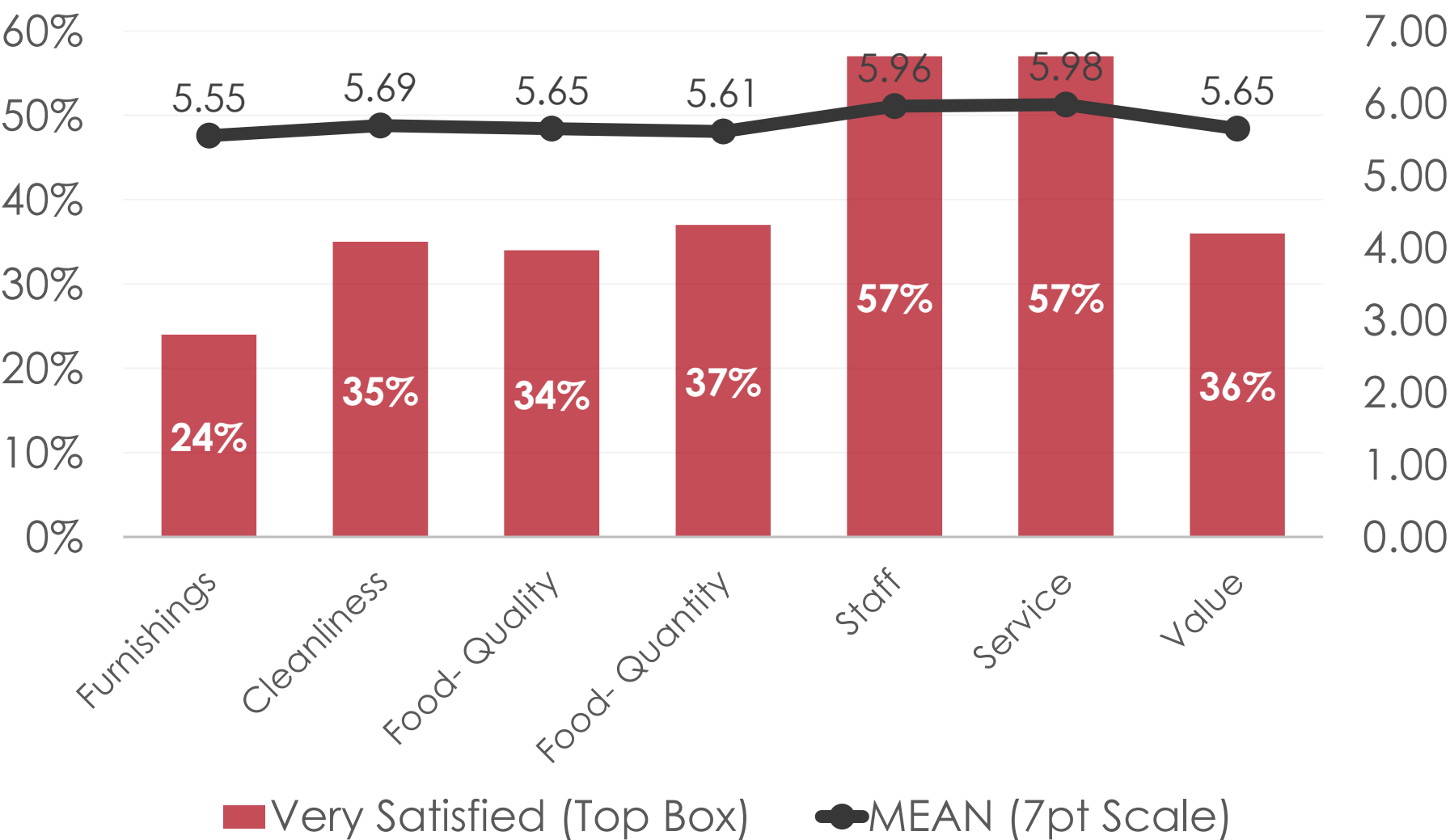


ACCOMMODATIONS –

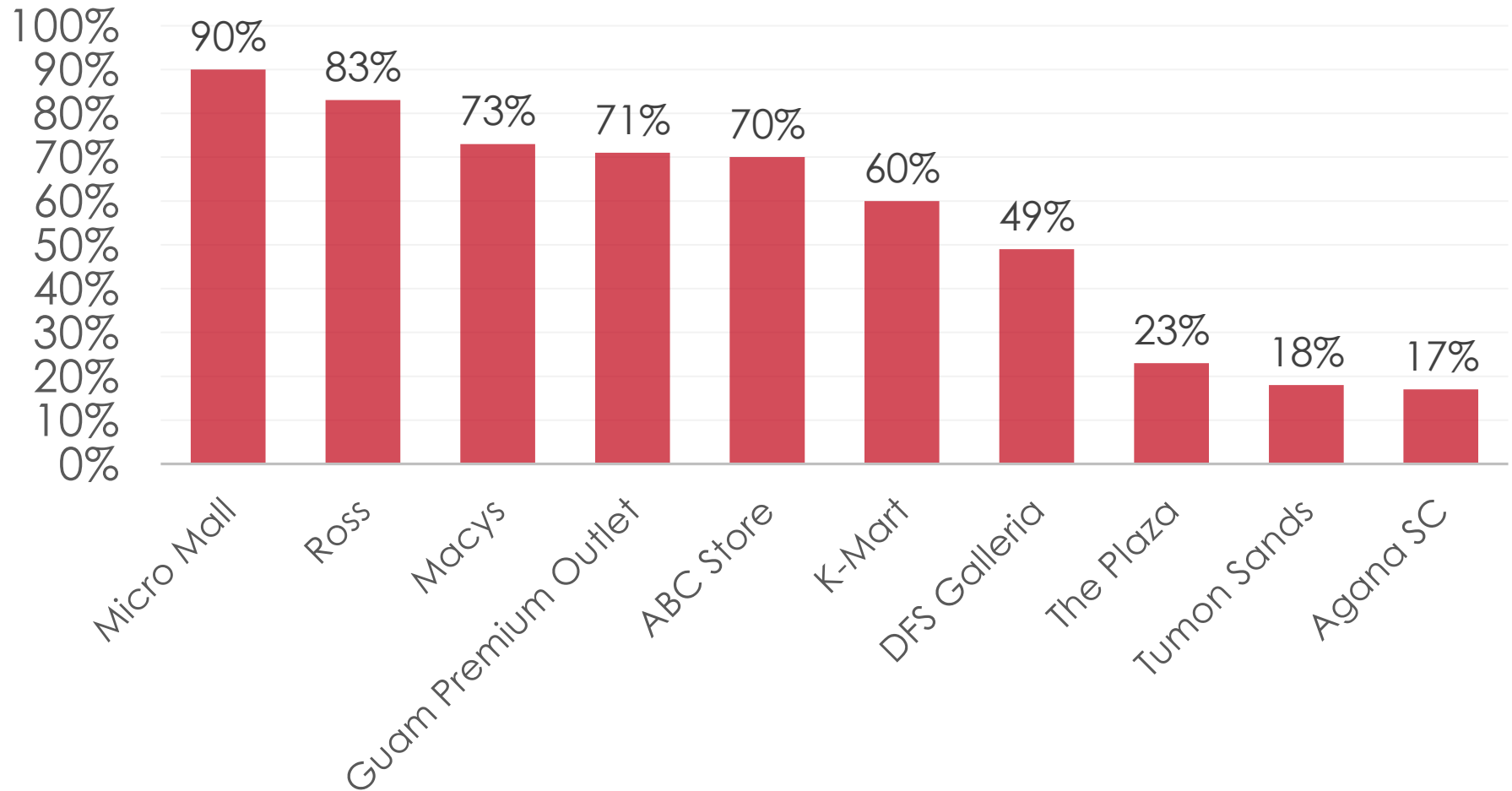
Satisfaction by Category



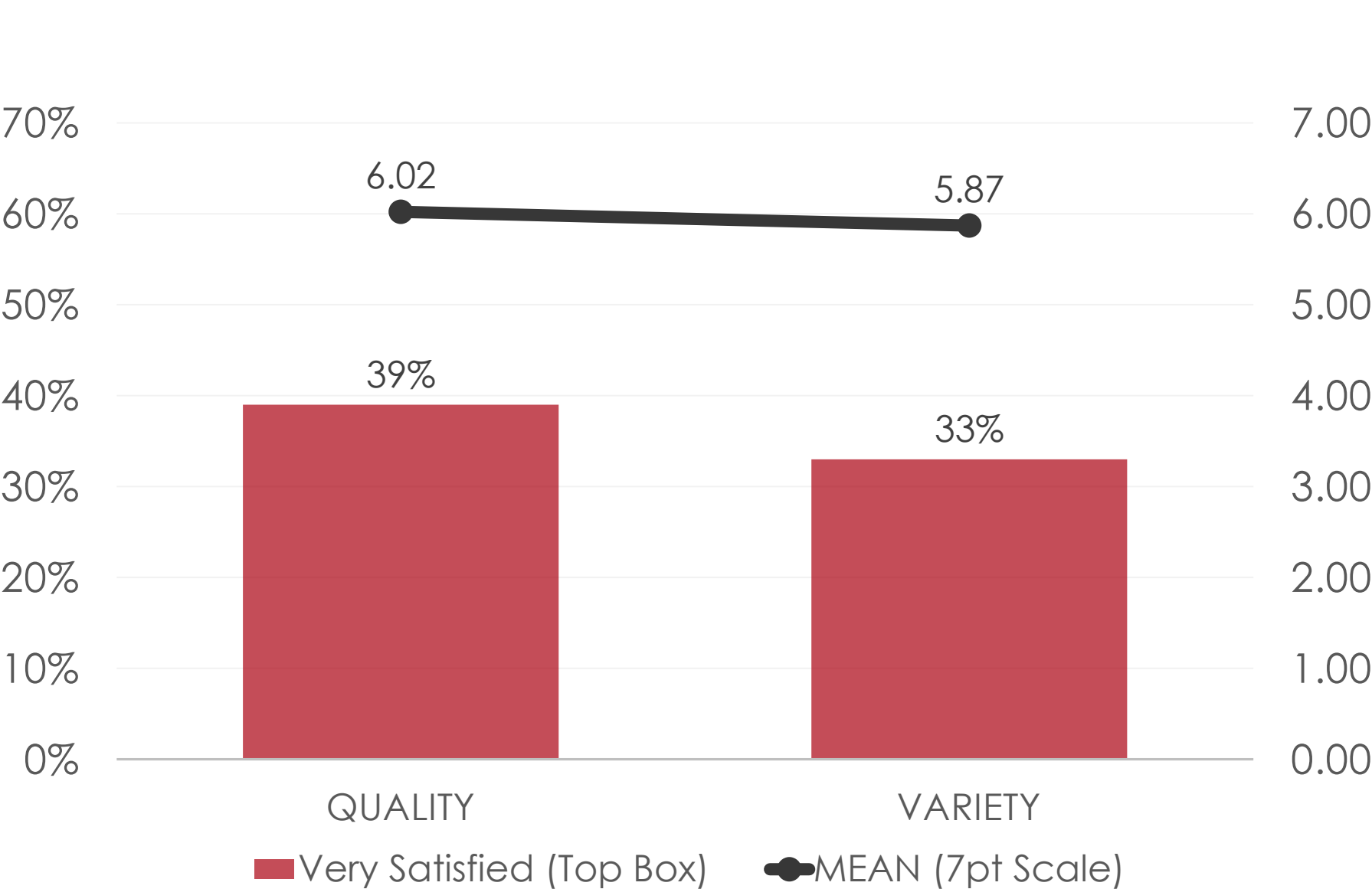
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



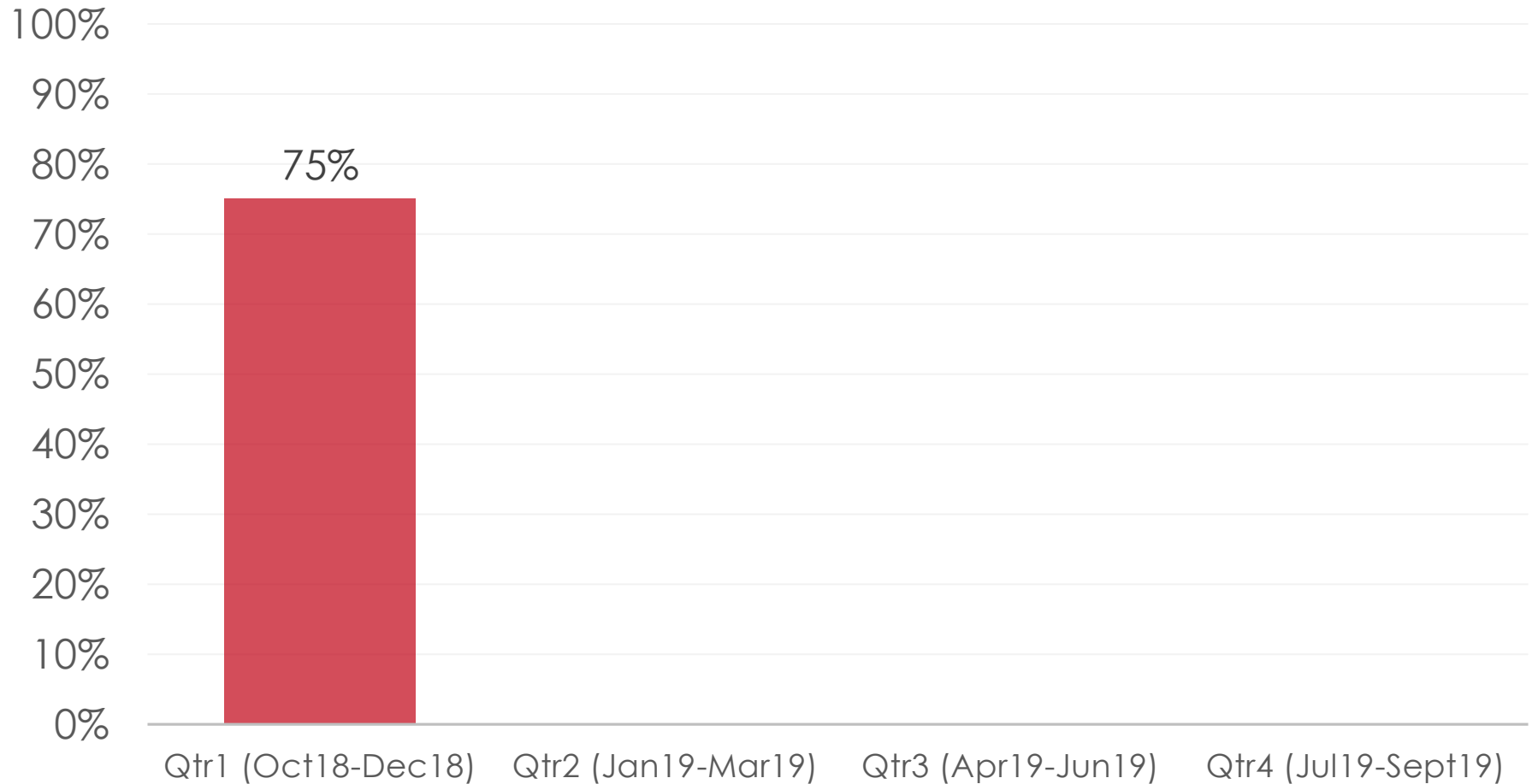
Shopping Malls/ Stores (Top Responses)



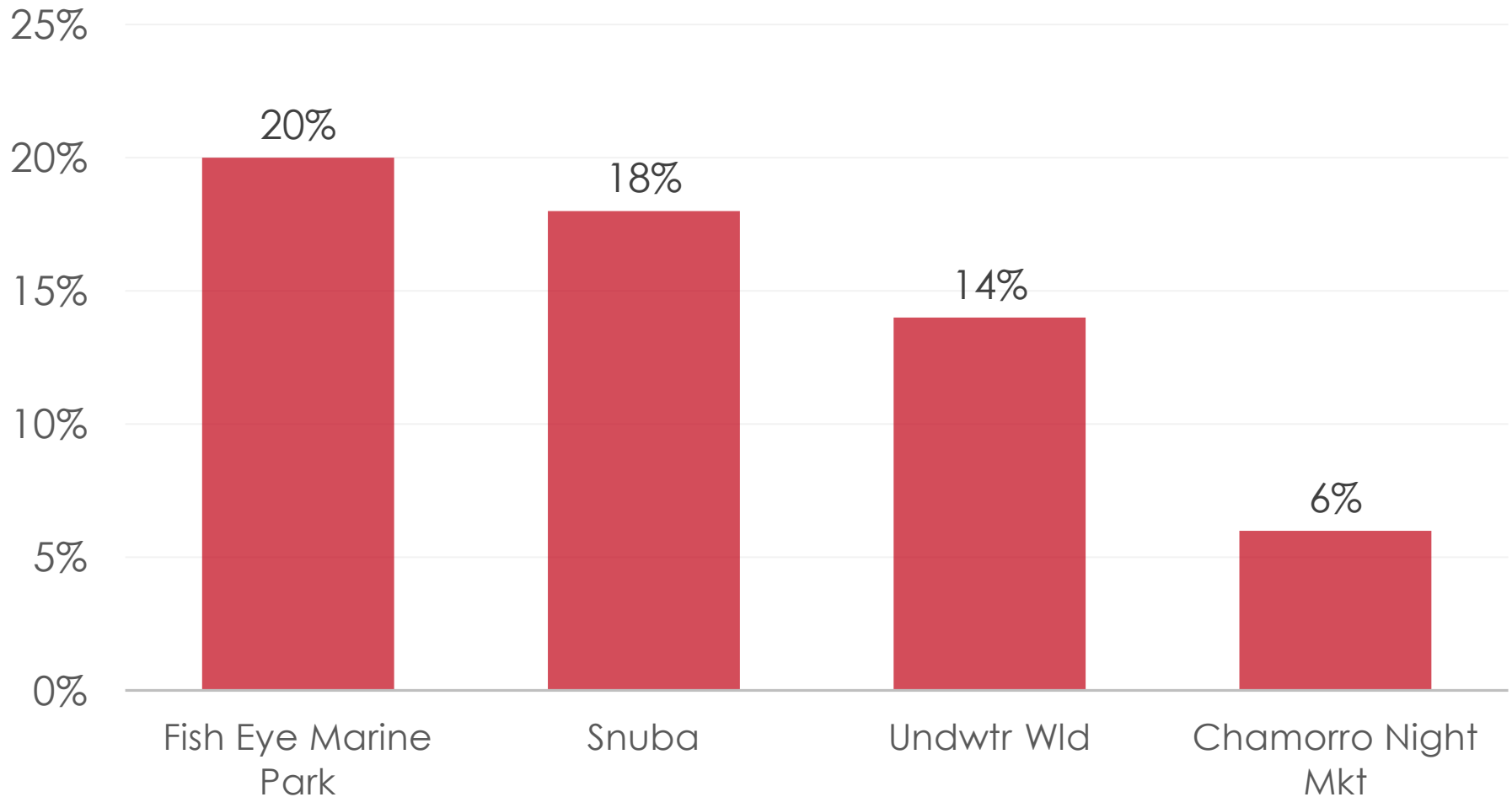
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – FY2019 Tracking

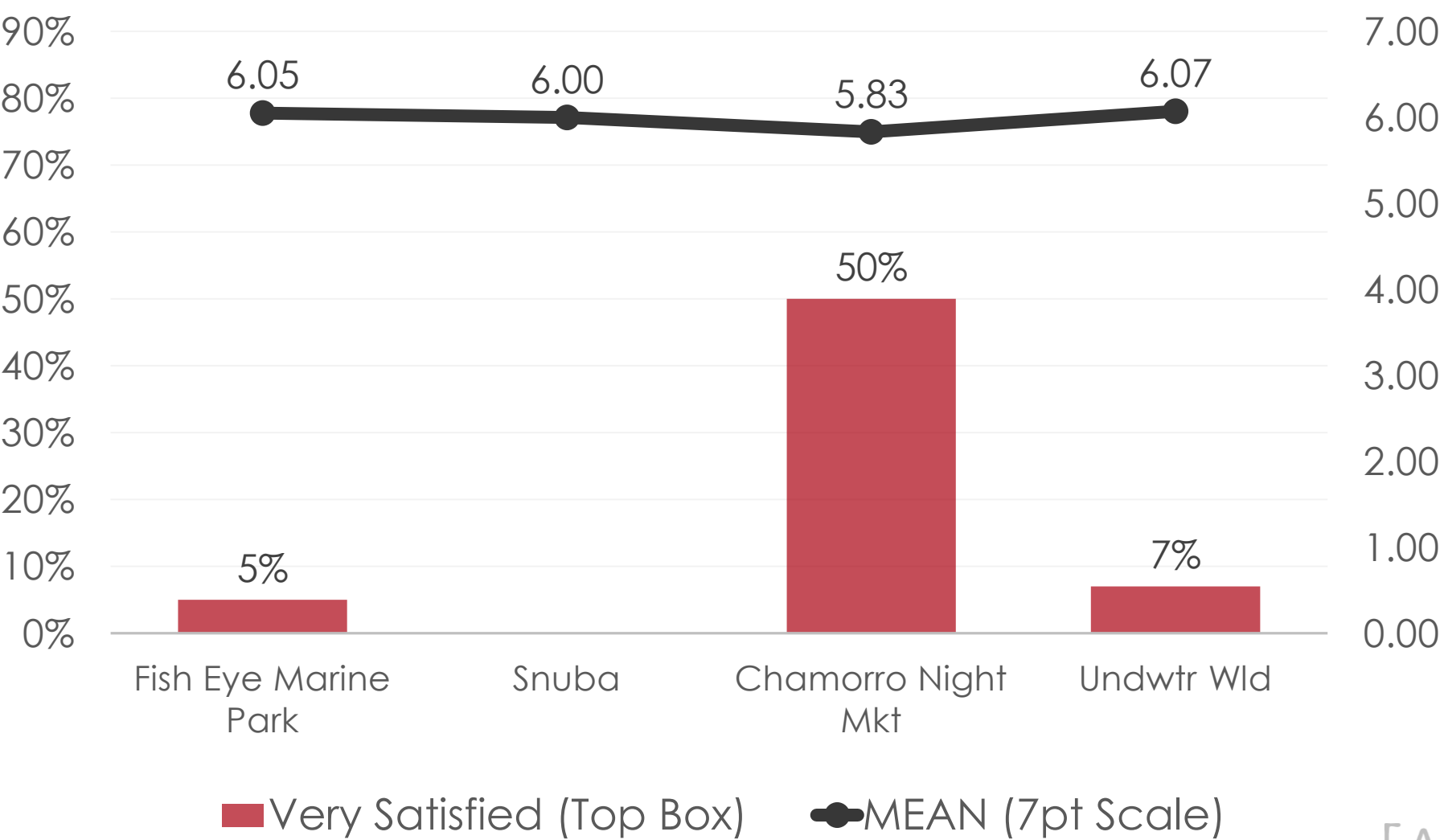


Optional Tour Participation (Top Responses/ 5%+)

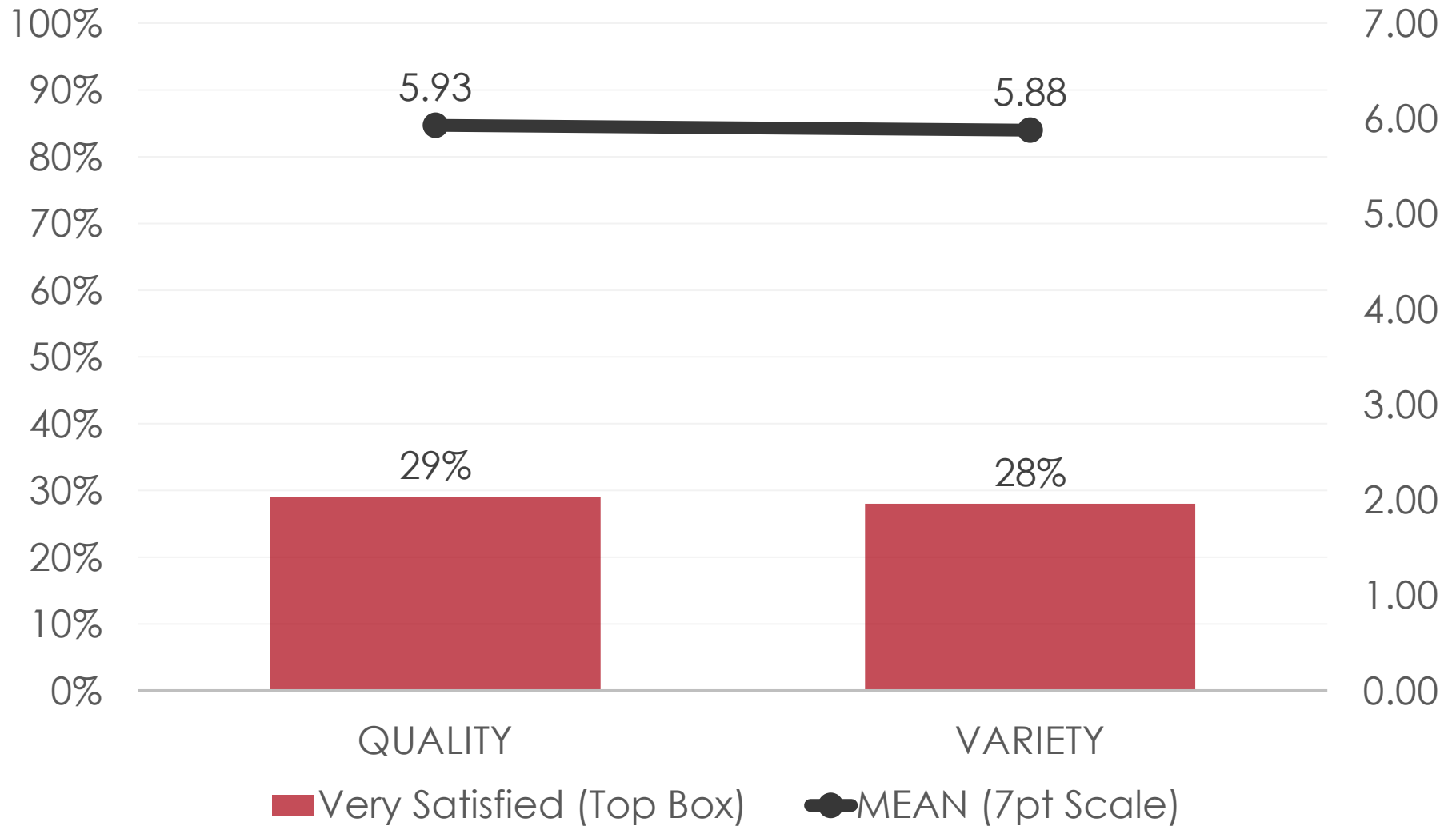


Optional Tour Satisfaction

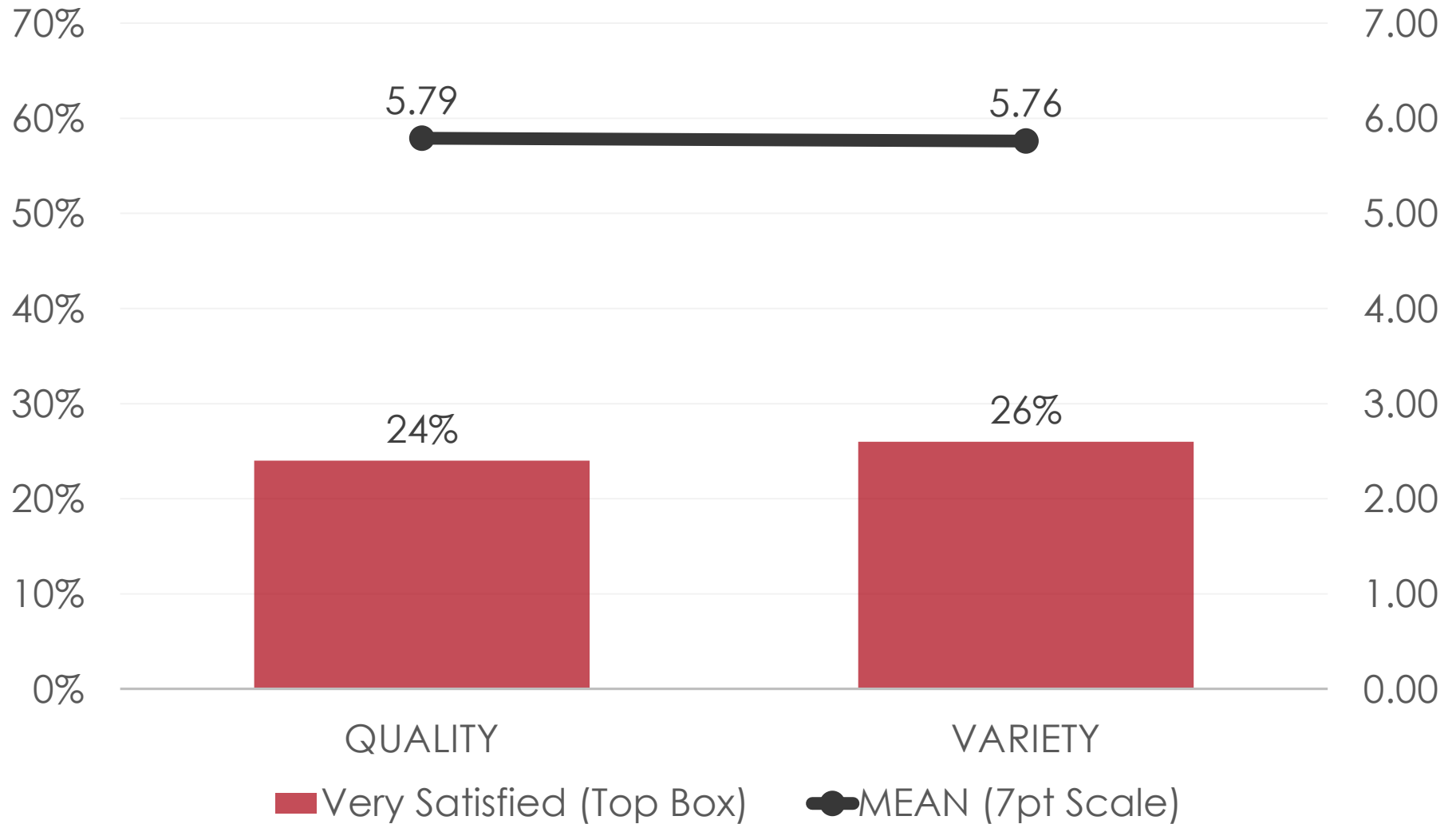
Top Responses only - Participation (5%+)



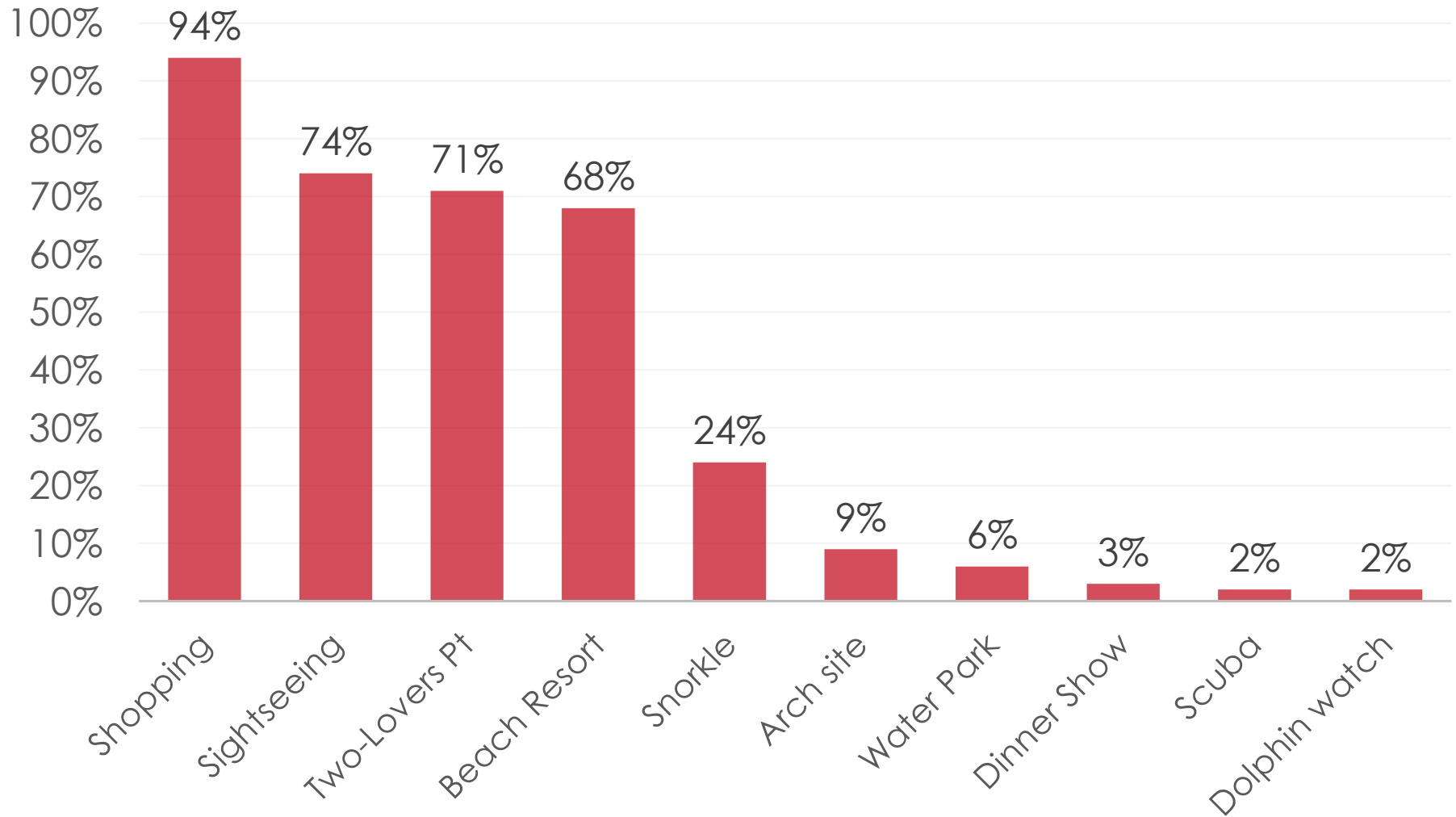
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION



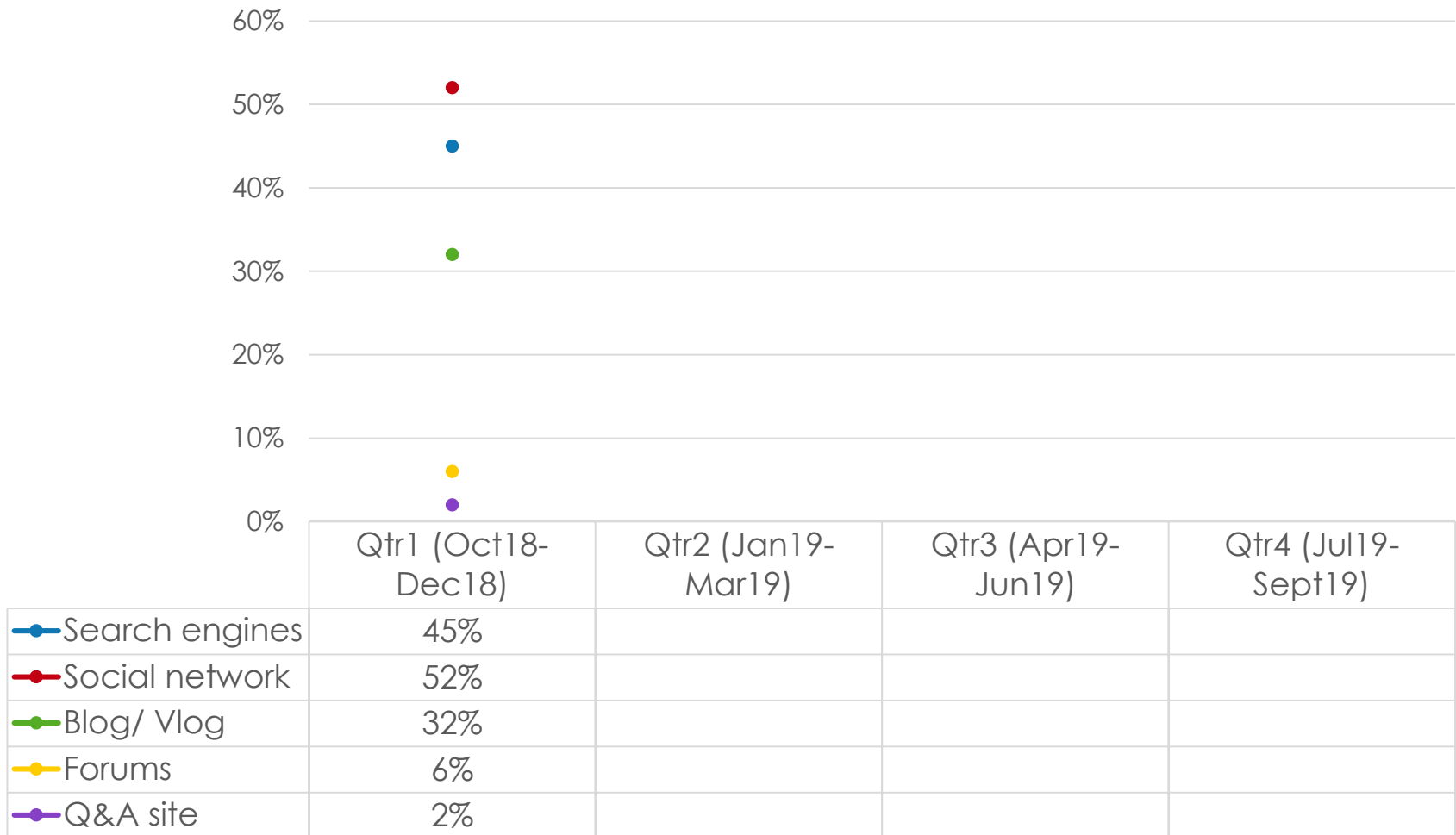
Activities Participation (Top Responses)



SECTION 5

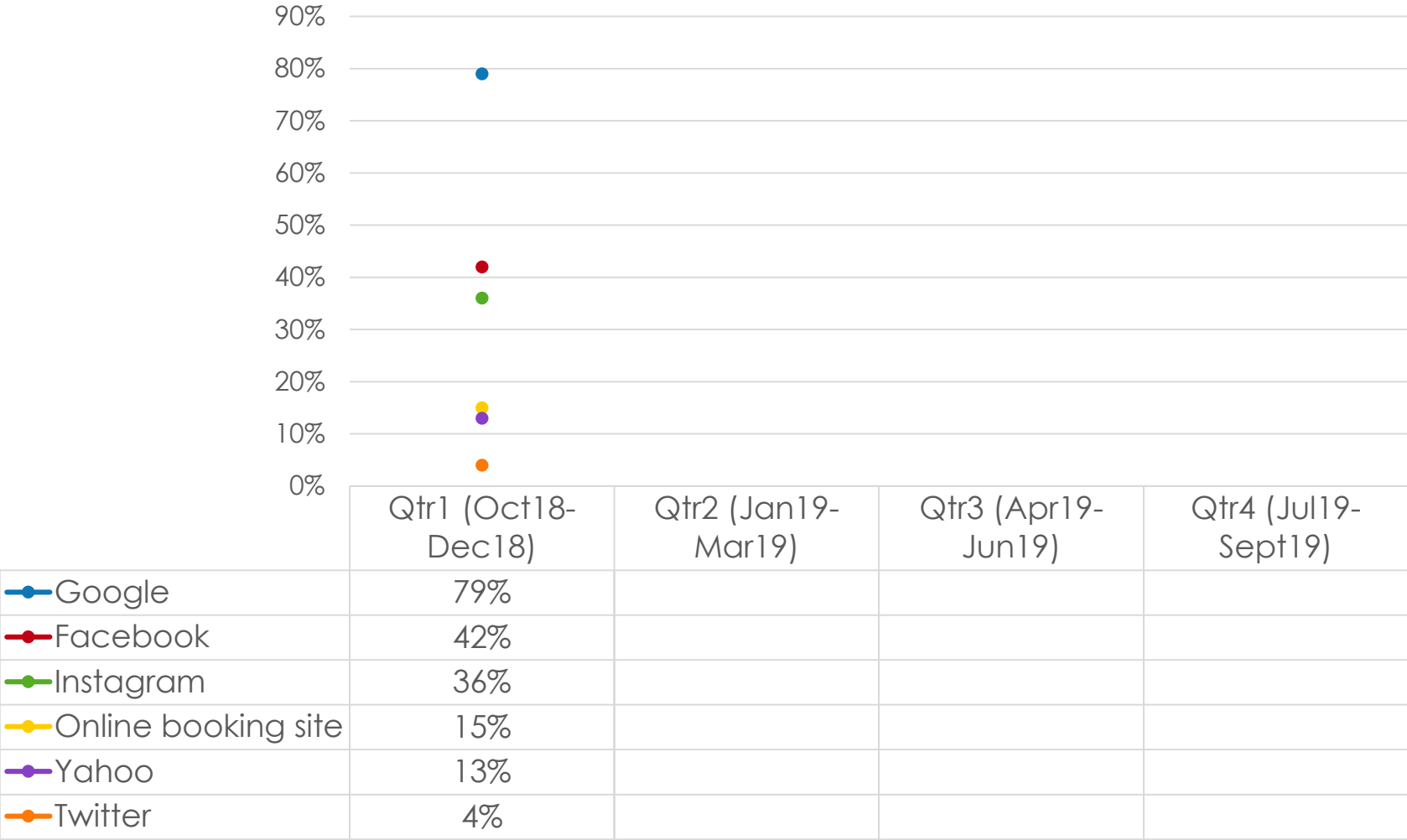
PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



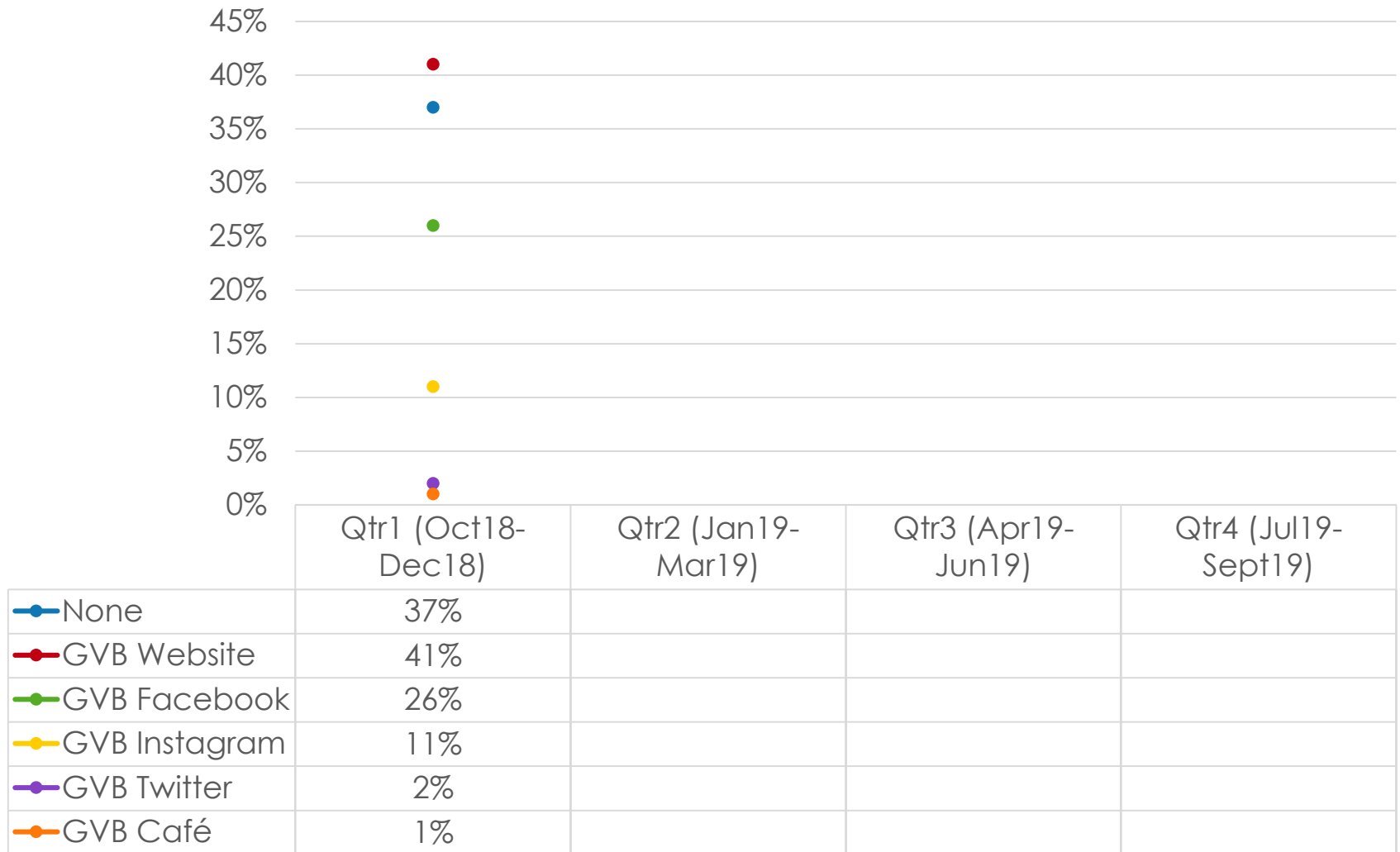
INTERNET- SOURCES OF INFORMATION

Things to do on Guam

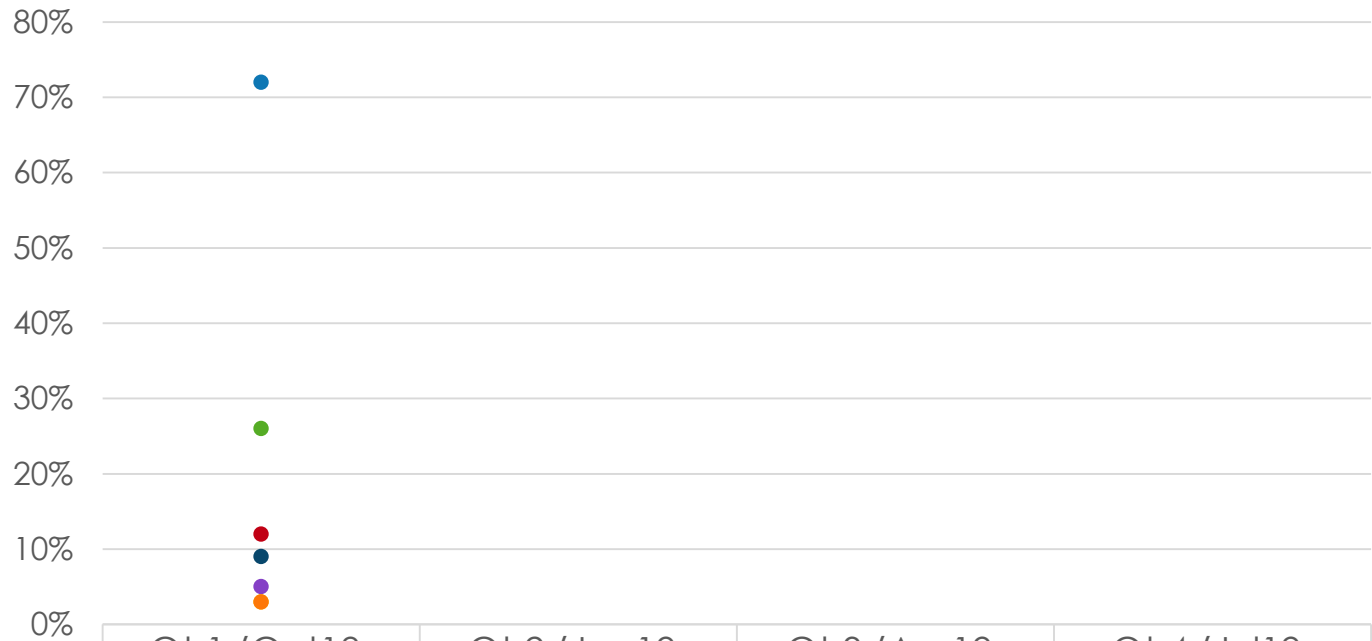


INTERNET- SOURCES OF INFORMATION

GVB

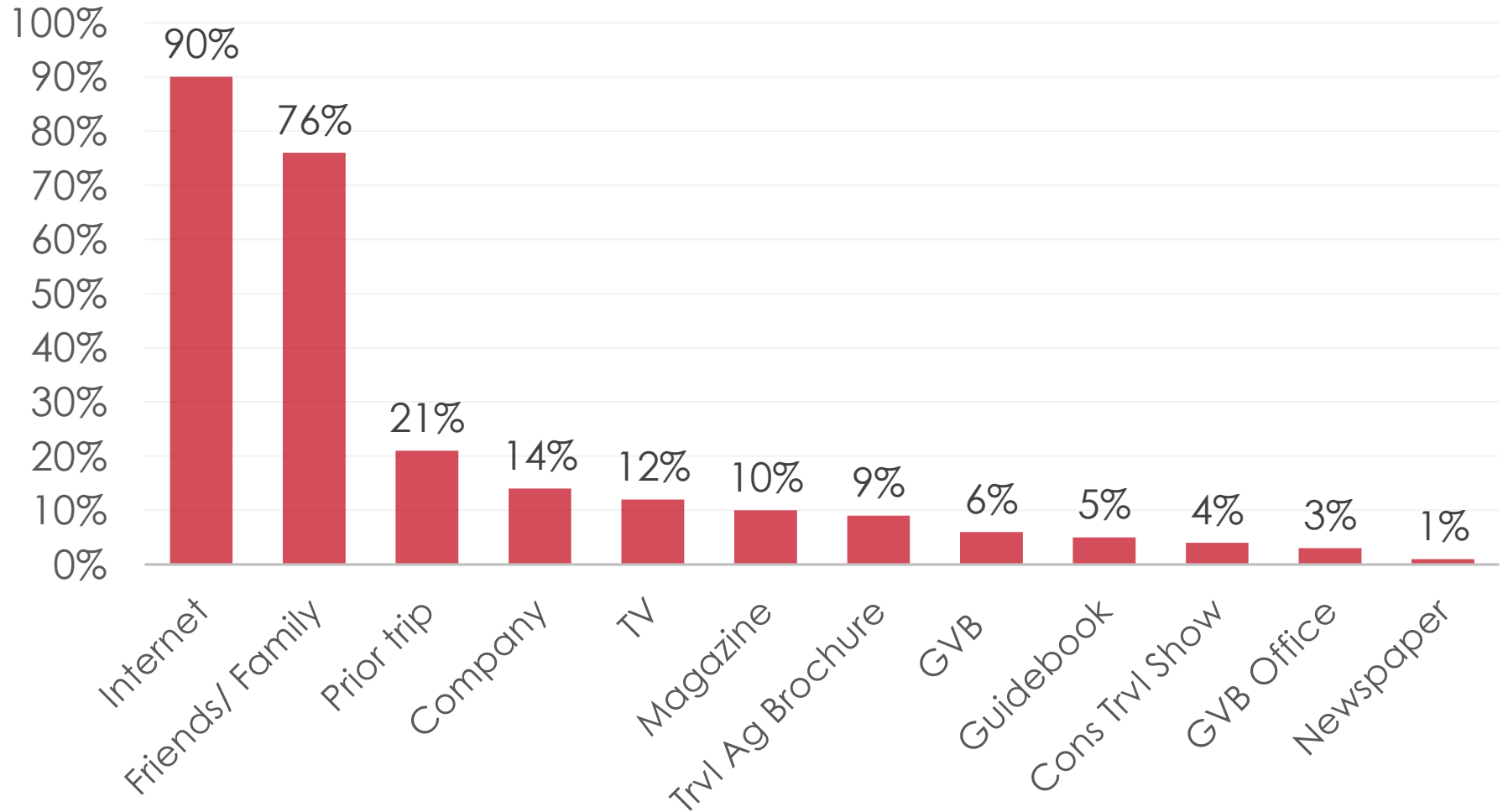


TRAVEL MOTIVATION



	Qtr1 (Oct18-Dec18)	Qtr2 (Jan19-Mar19)	Qtr3 (Apr19-Jun19)	Qtr4 (Jul19-Sept19)
Friends/ Family	72%			
Company/ Bus Trip	12%			
Internet	26%			
Travel Show	3%			
Travel Agent	5%			
Print	3%			
Social Media	9%			

PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

GVB EXIT SURVEY

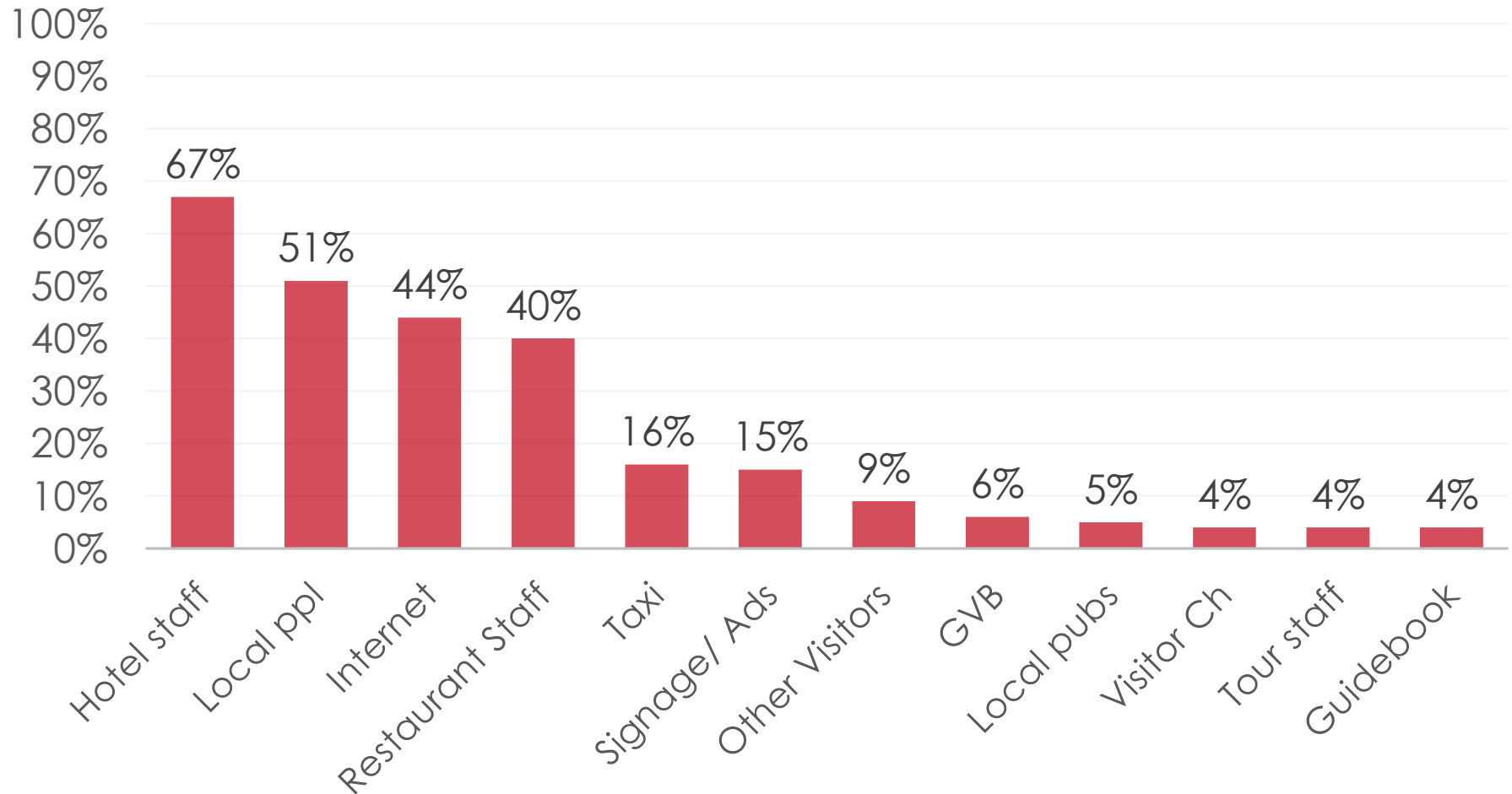
Q1 Please select the top three sources of information you used to find out about Guam before your trip:

	TOTAL	MICE	LEISURE	FIT	FAMILY
	-	-	-	-	-
Q1 Internet/Mobile App	90%	100%	93%	93%	92%
Friend or relative	76%	75%	78%	78%	78%
I have been to Guam before	21%		20%	21%	28%
Co-worker/ company travel department	14%	75%	15%	10%	8%
TV	12%		12%	11%	10%
Magazine (consumer)	10%		10%	9%	10%
Travel agent brochure	9%	50%	7%	6%	8%
Guam Visitors Bureau promotional activities	6%		6%	4%	6%
Travel guide book at bookstores	5%		6%	3%	4%
Consumer travel shows	4%		2%	4%	
Guam Visitors Bureau office	3%		4%	3%	4%
Newspaper	1%			1%	2%
Travel trade shows	1%		1%	1%	
Total	104	4	81	90	50

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:

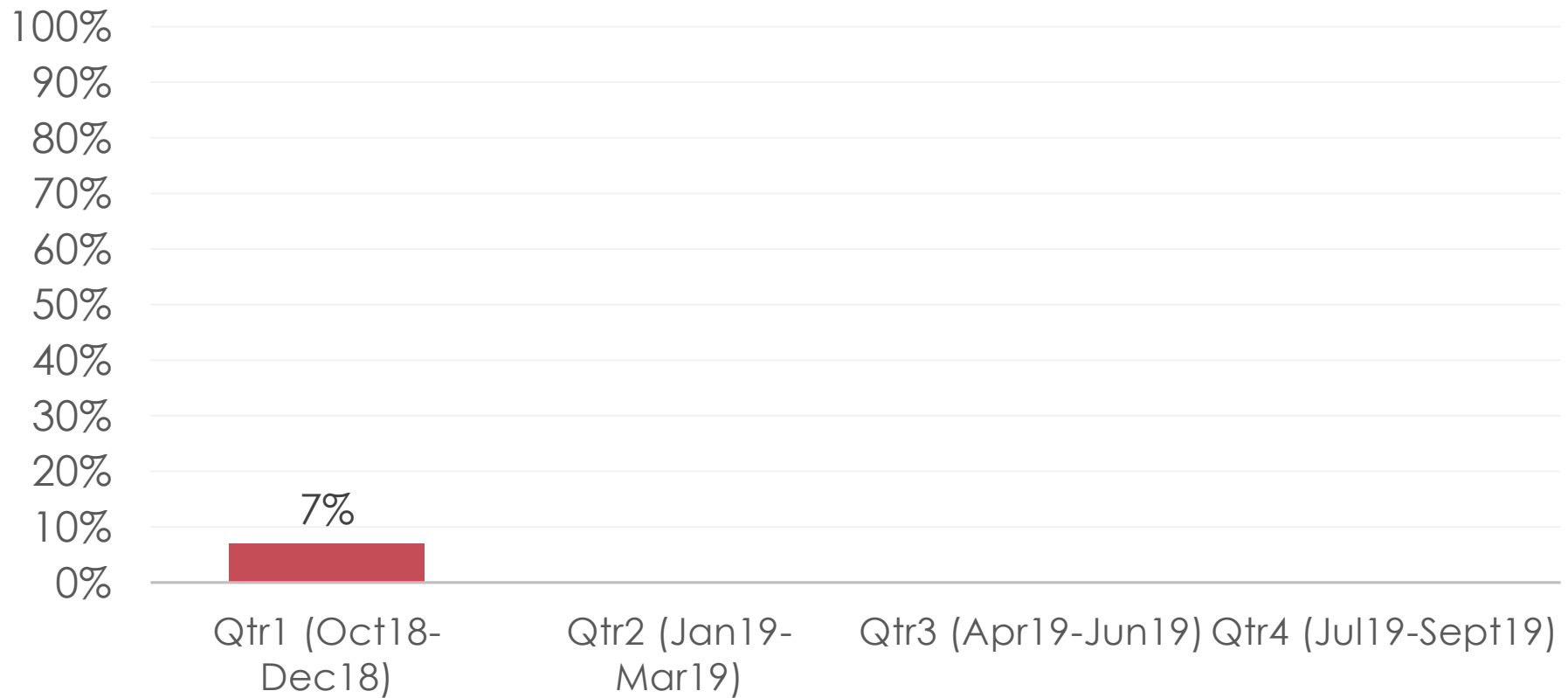
		TOTAL	MICE	LEISURE	FIT	FAMILY
		-	-	-	-	-
Q2	Hotel staff	67%	25%	71%	66%	76%
	Local people	51%	75%	46%	52%	45%
	Internet/Mobile App	44%	75%	48%	46%	45%
	Restaurant staff (outside hotel)	40%	50%	43%	42%	39%
	Taxi drivers	16%		15%	17%	22%
	Signs/ advertisement	15%		19%	15%	16%
	Other visitors	9%	25%	9%	8%	6%
	Guam Visitors Bureau	6%		5%	4%	8%
	Local publication	5%		3%	6%	4%
	Visitors channel	4%		3%	3%	4%
	Tour staff	4%		5%	2%	2%
	Guide books I brought with me	4%	50%	3%		2%
	Retail staff	2%		1%	1%	
	Total	103	4	80	89	49

Prepared by Anthology Research

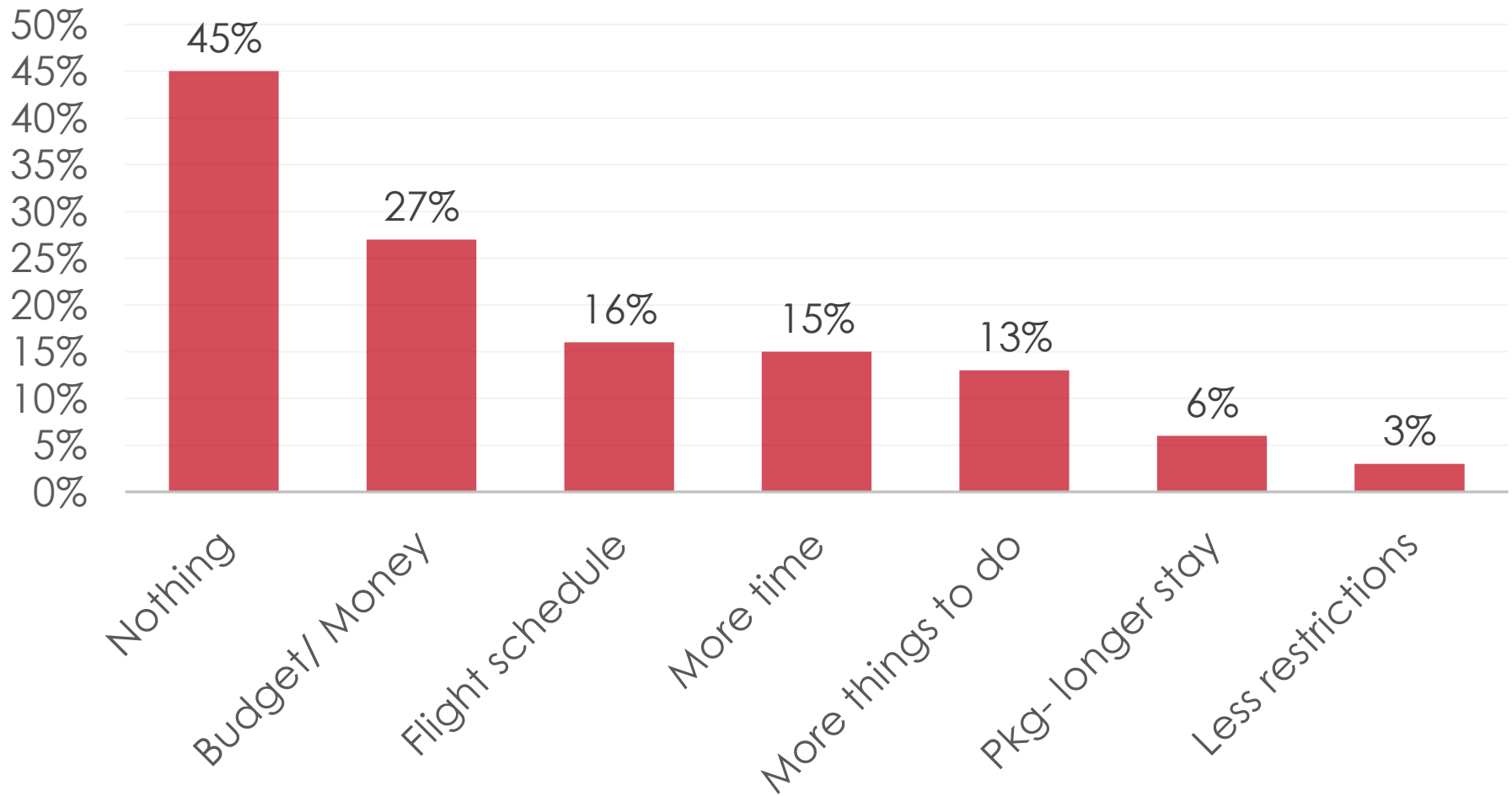
SECTION 6

FUTURE TRAVEL TO GUAM

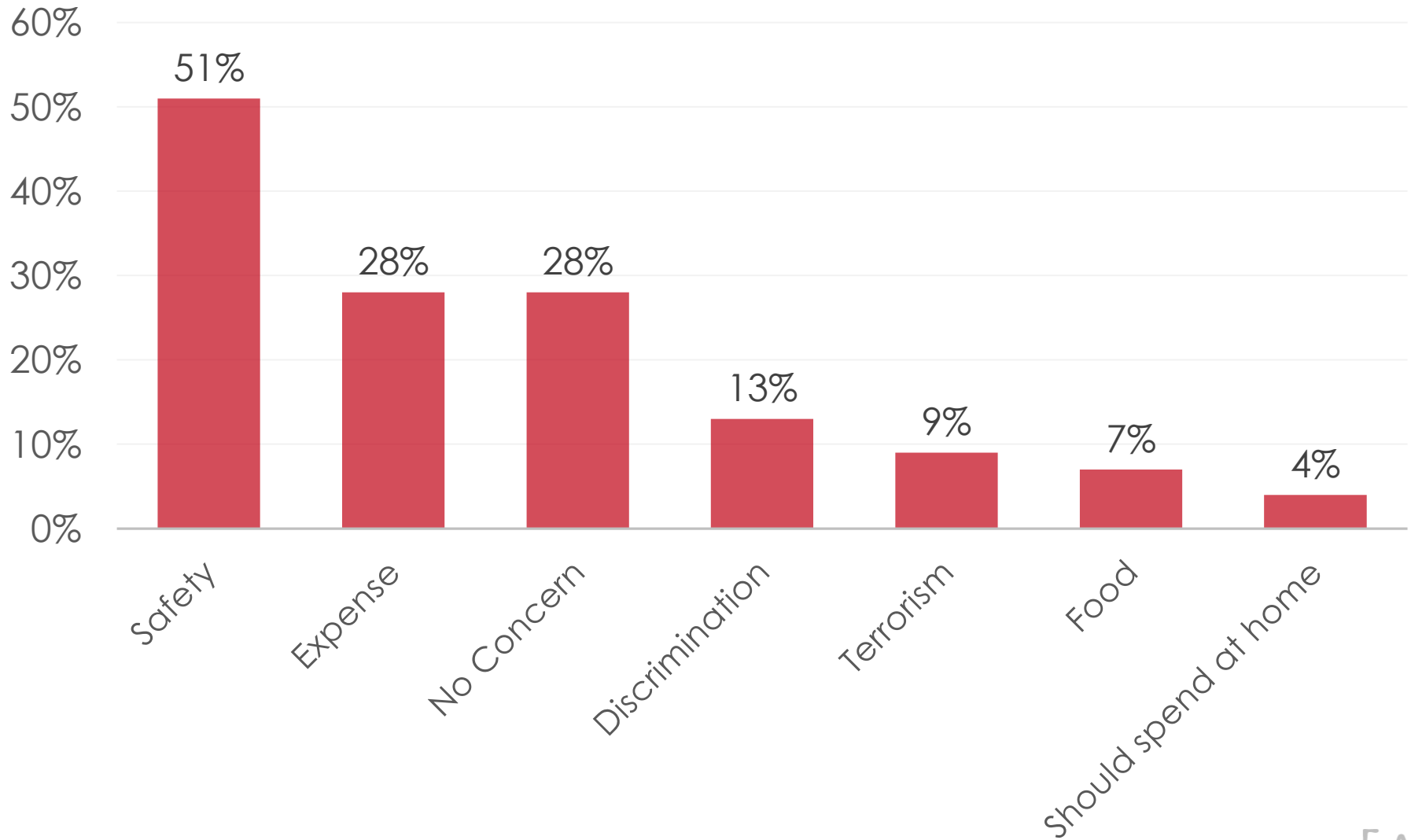
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



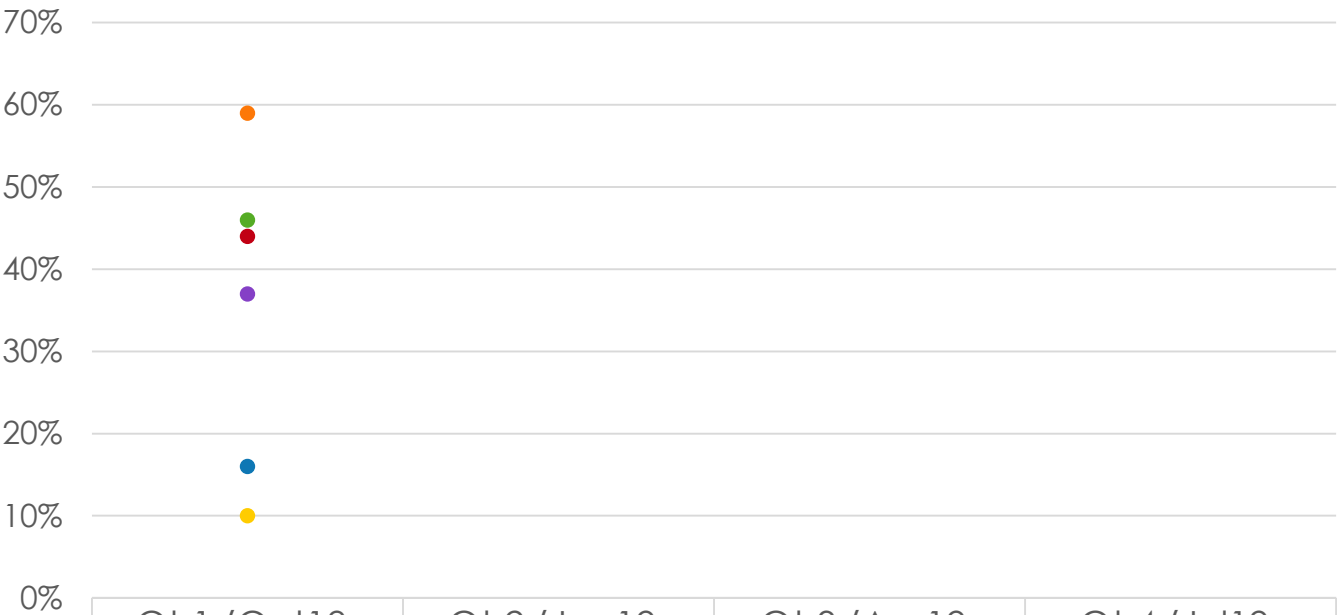
FUTURE TRAVEL CONCERNS



SECTION 7

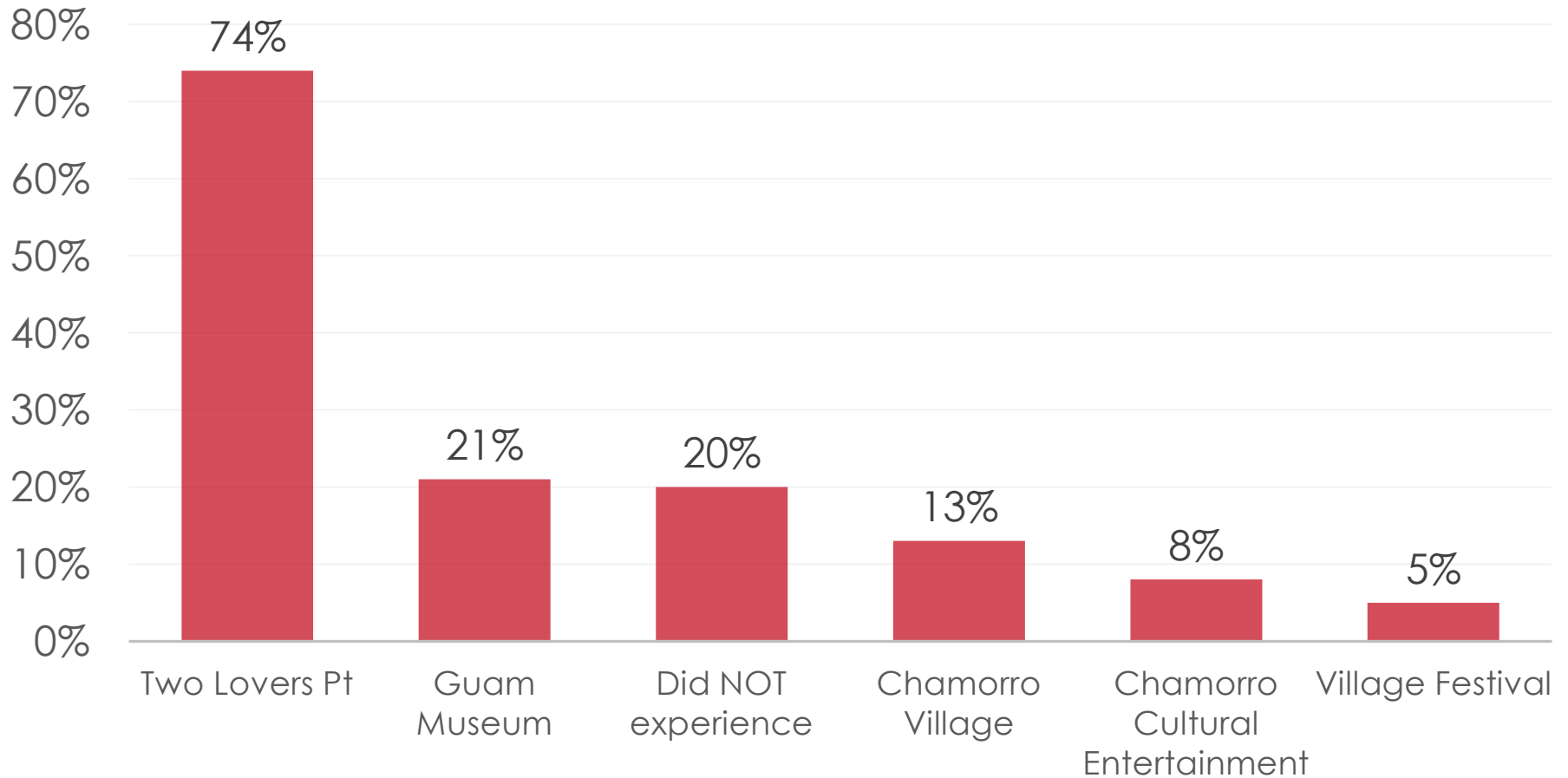
GUAM CULTURE

EXPERIENCED- CHAMORRO/ HAFA ADAI SPIRIT

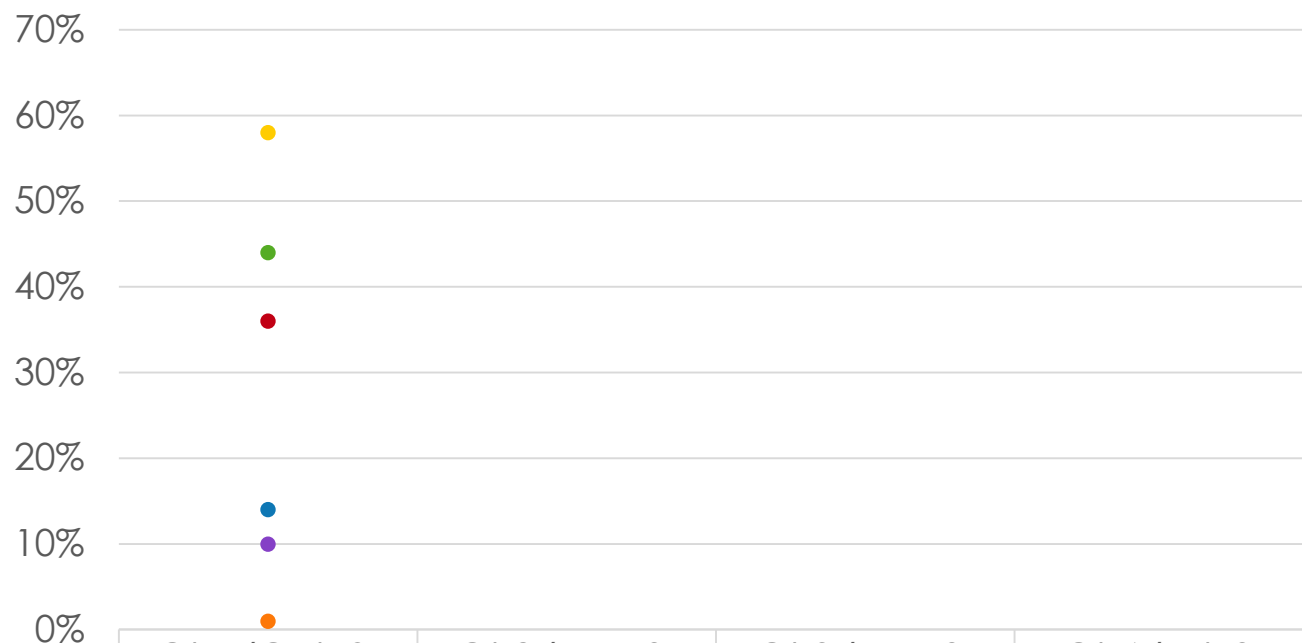


	Qtr1 (Oct18-Dec18)	Qtr2 (Jan19-Mar19)	Qtr3 (Apr19-Jun19)	Qtr4 (Jul19-Sept19)
Did NOT experience	16%			
Beaches	44%			
Chamorro cuisine	46%			
Night Market	10%			
Socializing- locals	37%			
Local Music	59%			

EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS

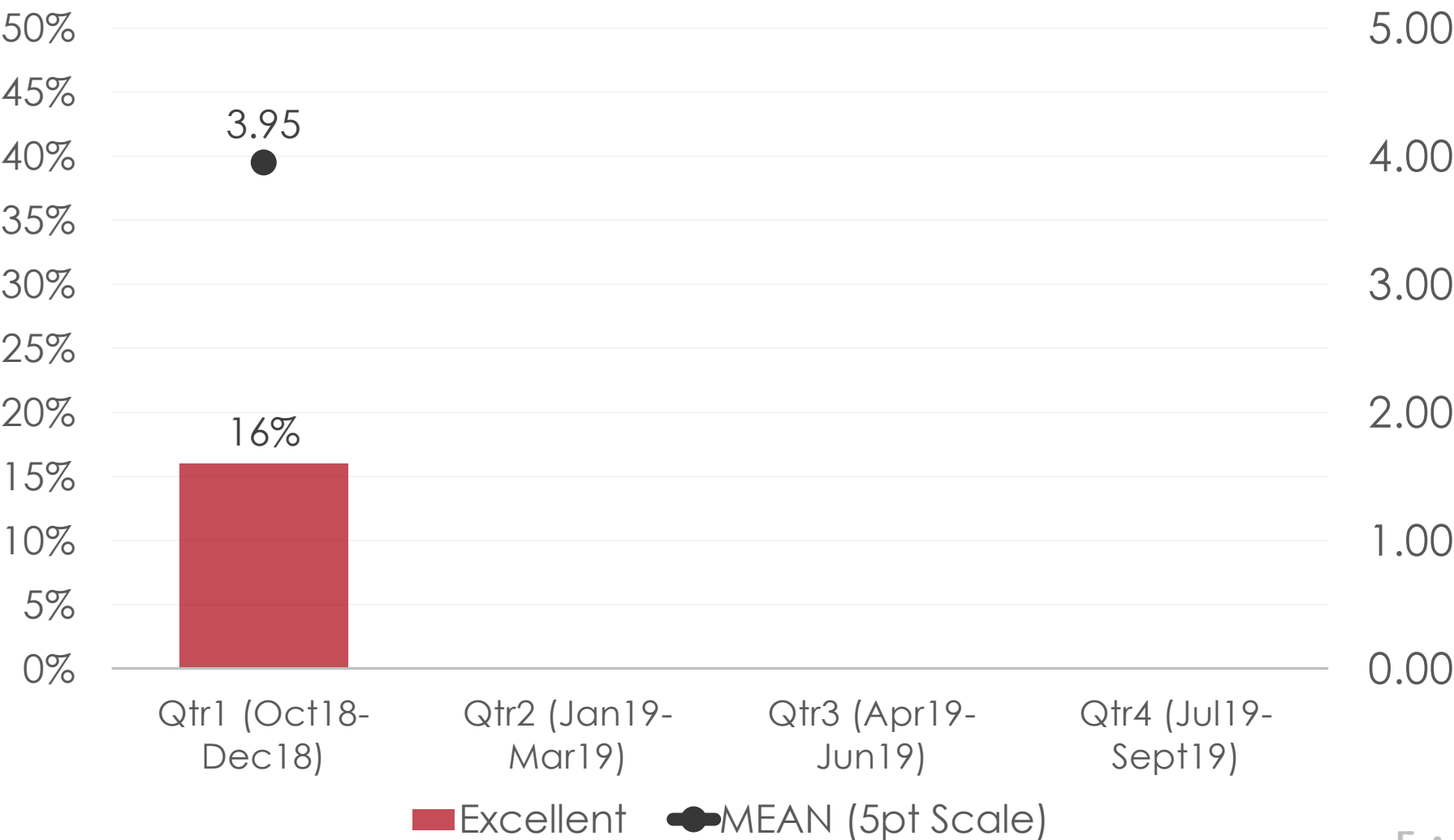


SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS

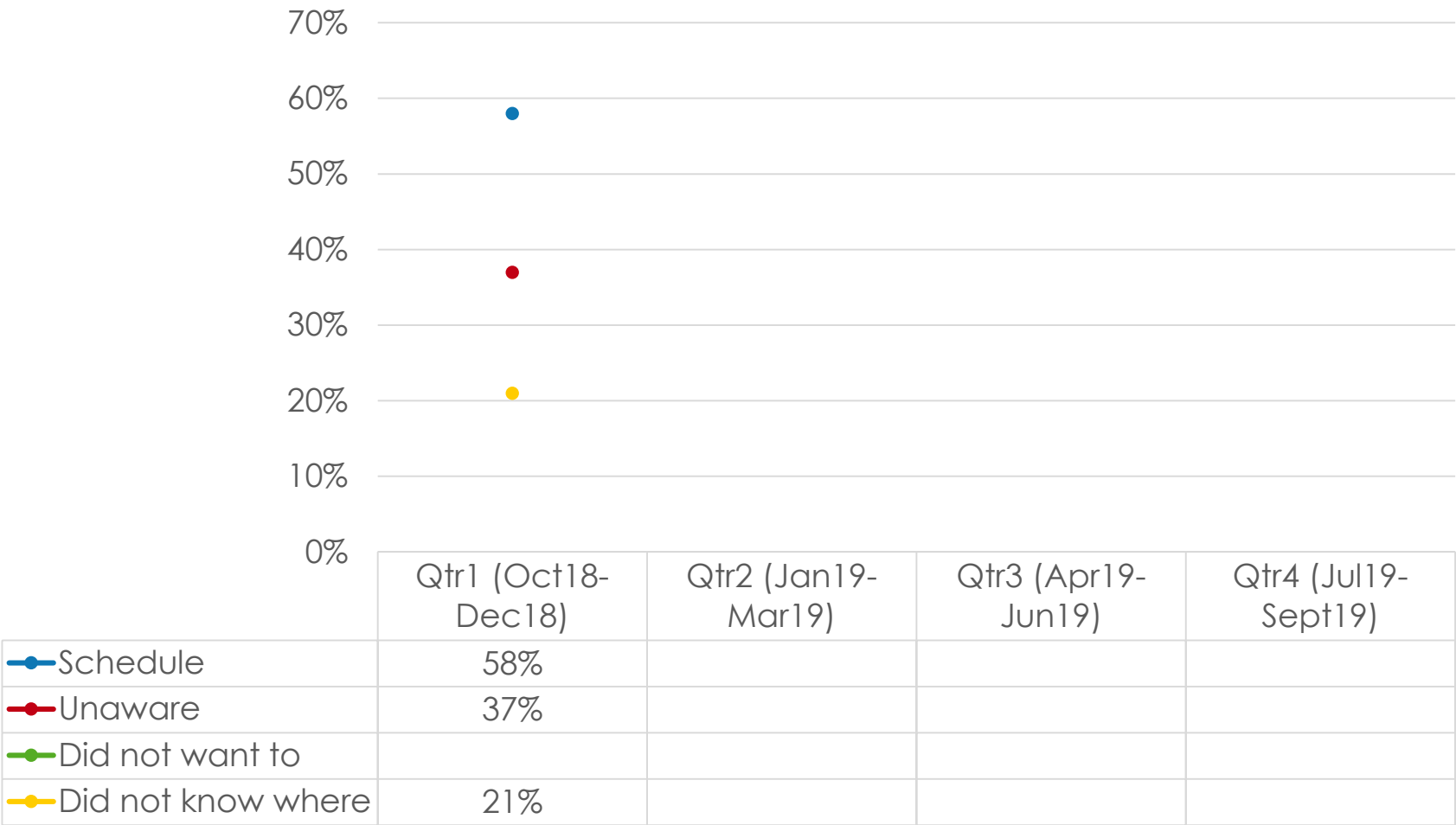


	Qtr1 (Oct18-Dec18)	Qtr2 (Jan19-Mar19)	Qtr3 (Apr19-Jun19)	Qtr4 (Jul19-Sept19)
Travel guide/ brochure	14%			
Travel agency	36%			
Internet	44%			
Family/ Friends	58%			
Hotel staff	10%			
Print	1%			

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 Qtr. FY2019	
Drivers:	1st Qtr. 2019 rank
Quality & Cleanliness of beaches & parks	
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	1
Variety of shopping	
Price of things on Guam	2
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	4
Quality of ground handler	3
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	87.6%

Drivers of Overall Satisfaction

- **Overall satisfaction** with Filipino visitor's experience on Guam is driven by four significant factors in the 1st Quarter FY2019 Period. By rank order they are:
 - **Quality of shopping,**
 - **Price of things on Guam,**
 - **Quality of ground handler, and**
 - **Quality of landscape in Guam.**
- With these factors the overall r^2 is .876 meaning that **87.6% of overall satisfaction is accounted for by these factors.**

Drivers – On-Isle Expenditures

Drivers of Per Person On Island Expenditures, 1st Qtr. FY2019	
Drivers:	rank
Quality & Cleanliness of beaches & parks	
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	0.0%
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 1st Quarter FY2019 Period.