



# *Guam Visitors Bureau*

## Filipino Visitor Tracker Exit Profile & Market Segmentation Report

FY2019 - QTR.2 (JAN-MAR 2019)

[ANTHOLOGY®]  
RESEARCH



# Background and Methodology

- All surveys were partially interviewer administered. Upon completion of the surveys, Anthology's professional Filipino speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent was present.
- A total of 107 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 107 is +/- 9.4 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 +/- 9.4 percentage points.

# Objectives

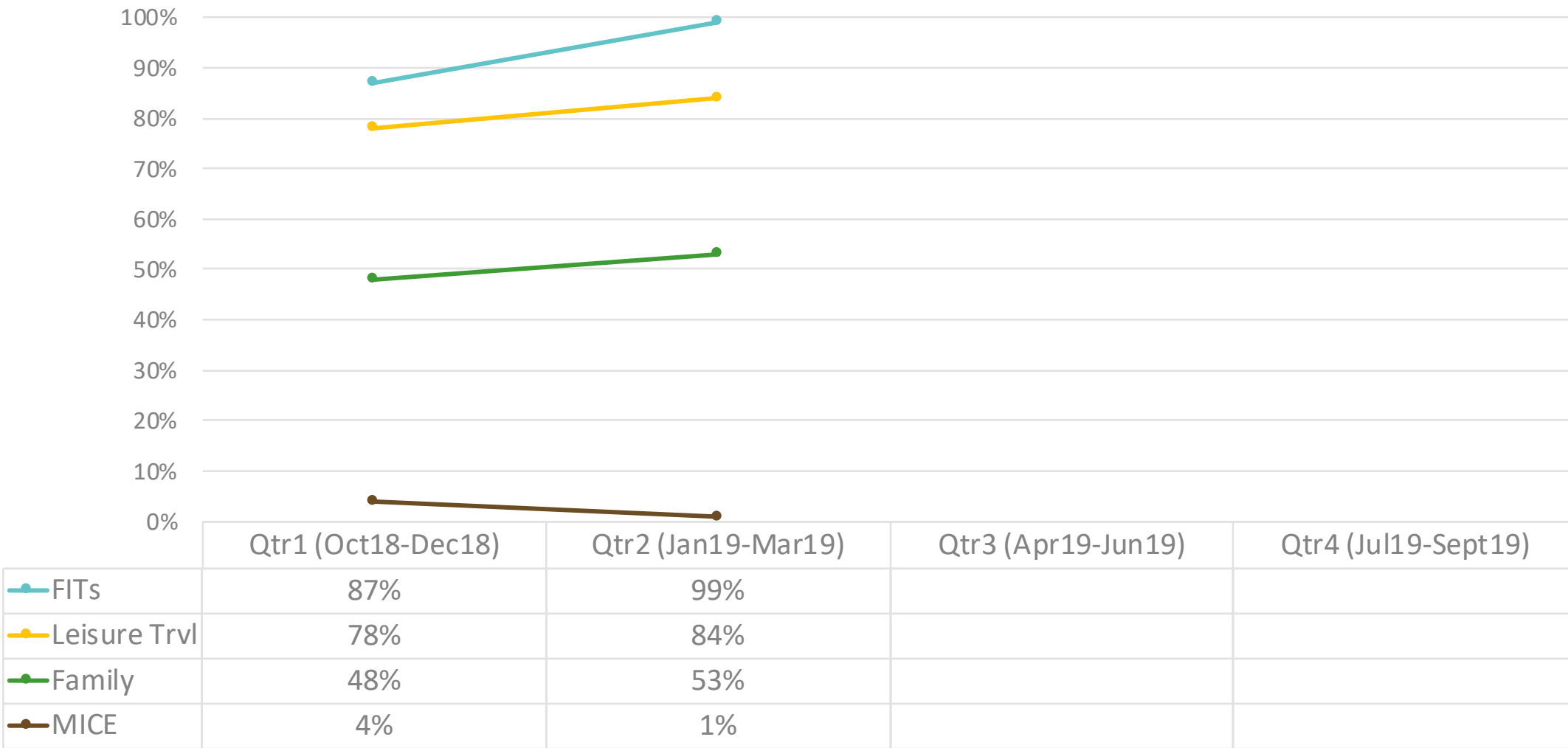
- To monitor the effectiveness of the Philippines seasonal campaigns in attracting Filipino visitors, refresh certain baseline data, to better understand the nature and economic value or impact of each of the targeted segments in the Philippines marketing plan.
- Identify significant determinants of 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 (Q12 Not on Organized Group Tour or Q14 Direct booking w/ airline, hotel)
    - Leisure (Q8- relax, natural beauty, sightseeing, vacation)
    - Family (Q11)
    - MICE (Q8- Convention, conference, trade show, meeting, incentive trip)
  - To identify the most significant factors affecting overall visitor satisfaction.
  - To identify (for all visitors from Philippines) the most important determinants of on-island spending.



# Key Highlighted Segments

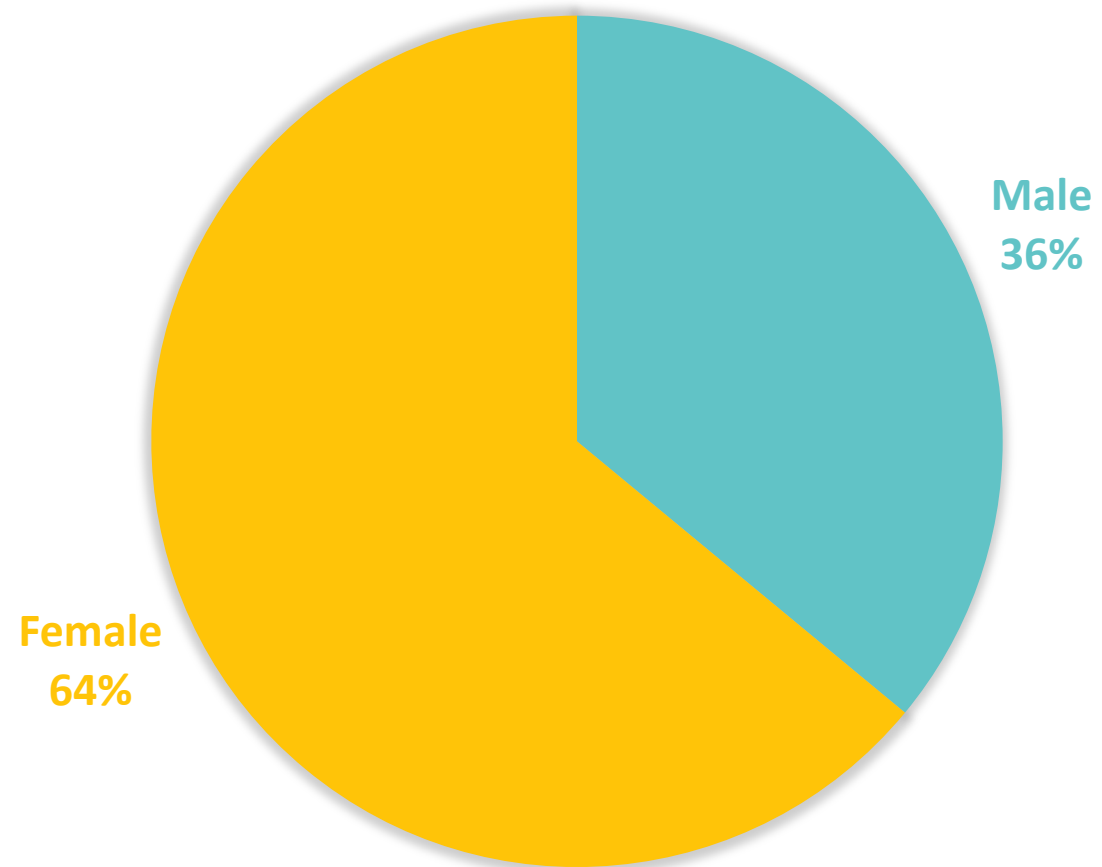




SECTION 1

# PROFILE OF RESPONDENTS

# GENDER

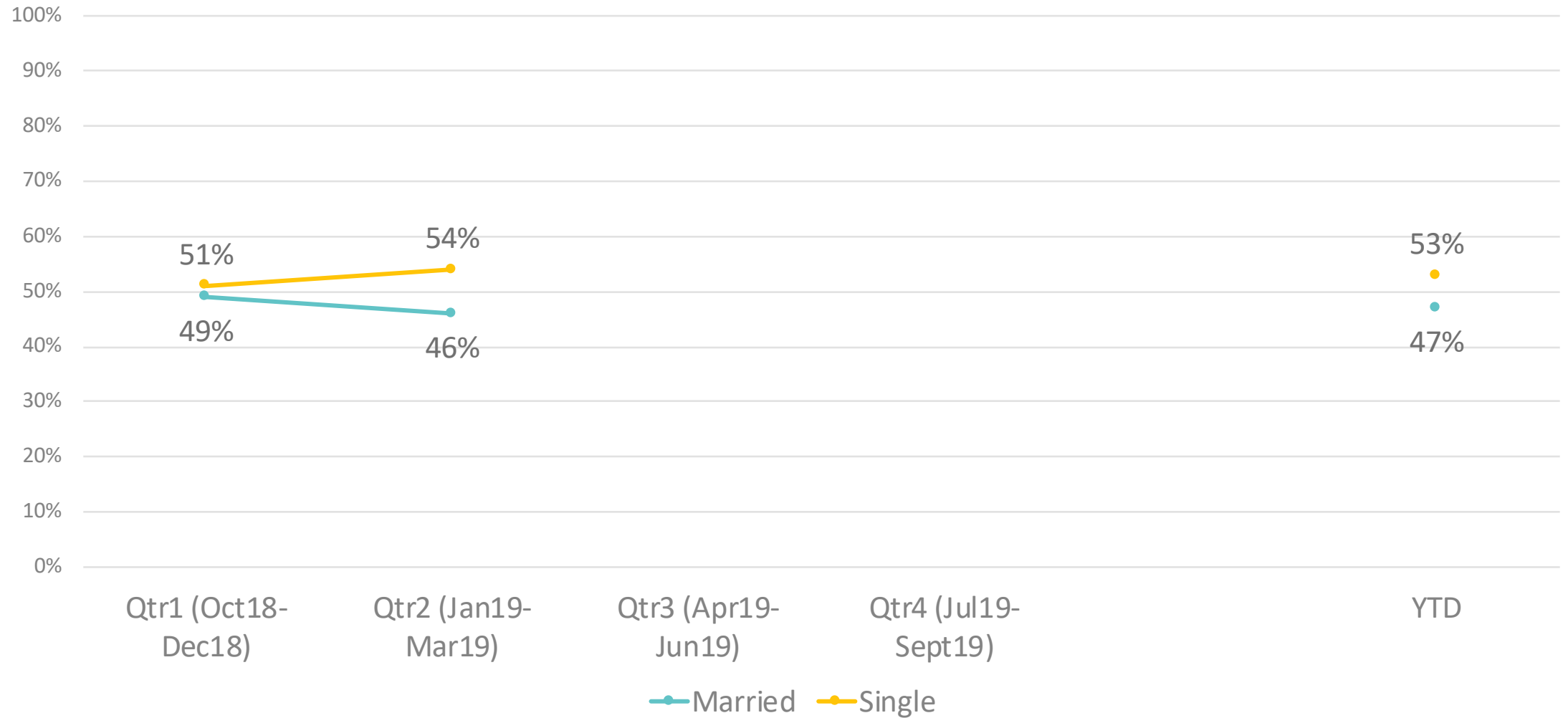


# MARITAL STATUS





# MARITAL STATUS – TRACKING



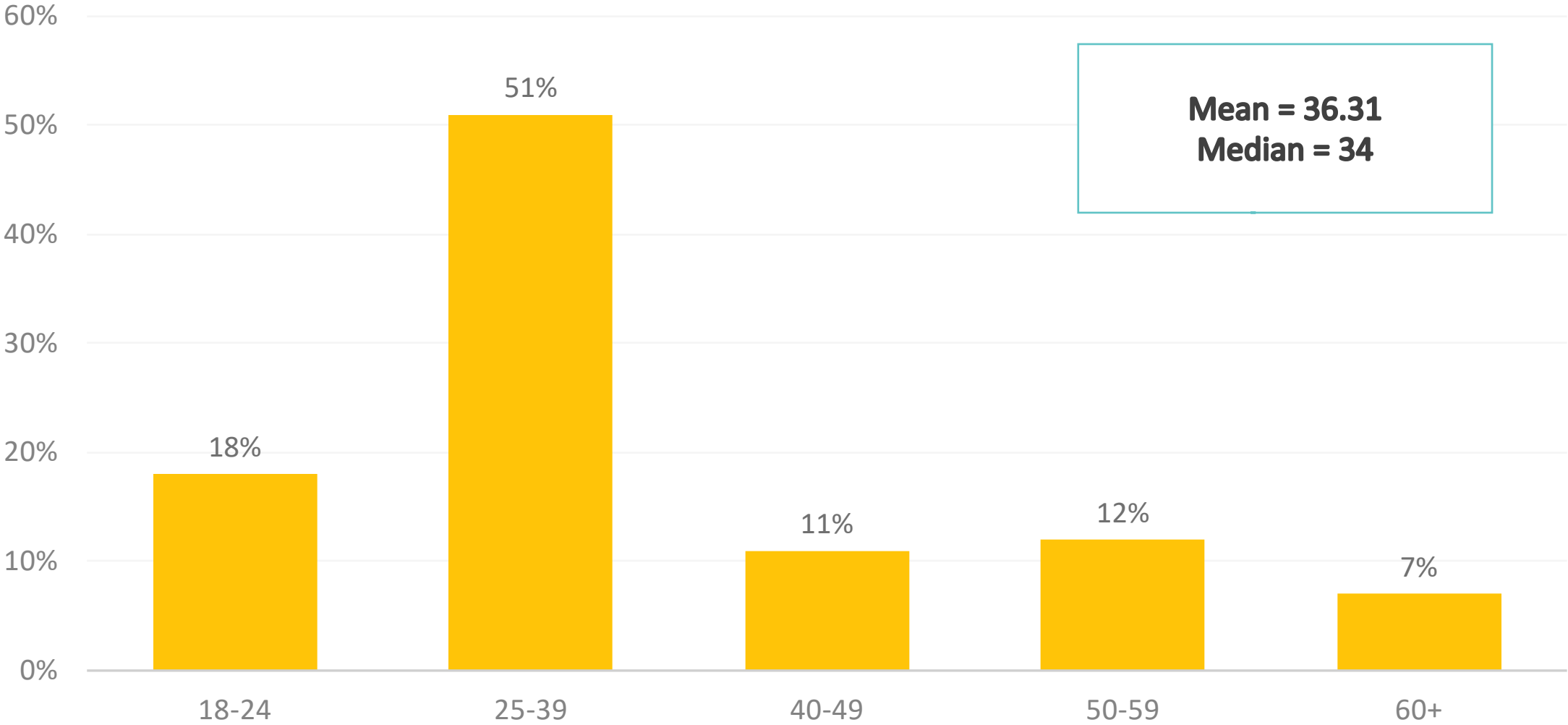
# MARITAL STATUS – SEGMENTATION

**GVB VISITOR SATISFACTION STUDY**  
**QE Are you married or single?**

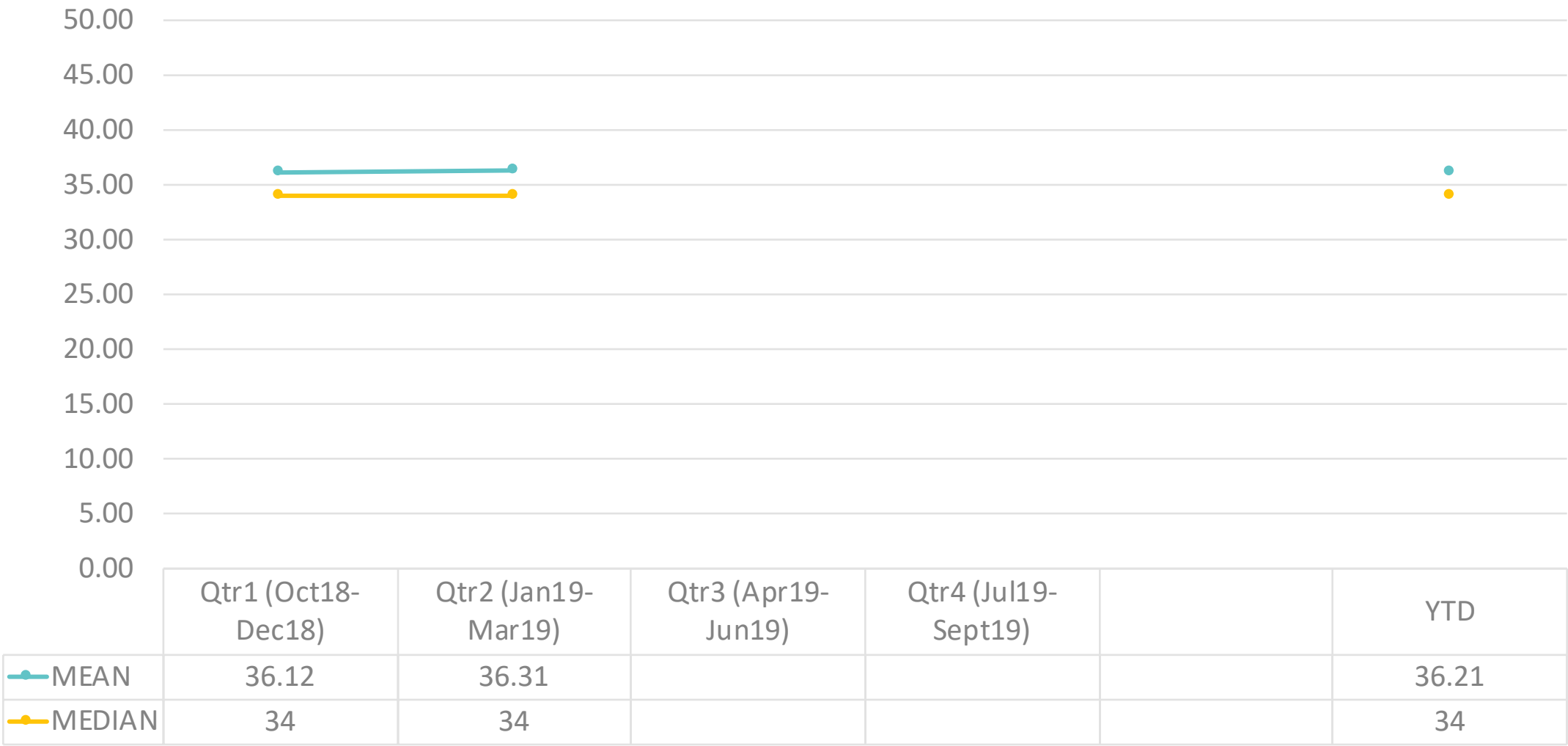
		TOTAL	FAMILY	FIT	MICE
		-	-	-	-
QE	Married	46%	72%	45%	
	Single	54%	28%	55%	100%
	Total	107	57	106	1

\*Prepared by Anthology Research\*

# AGE



# AGE – TRACKING





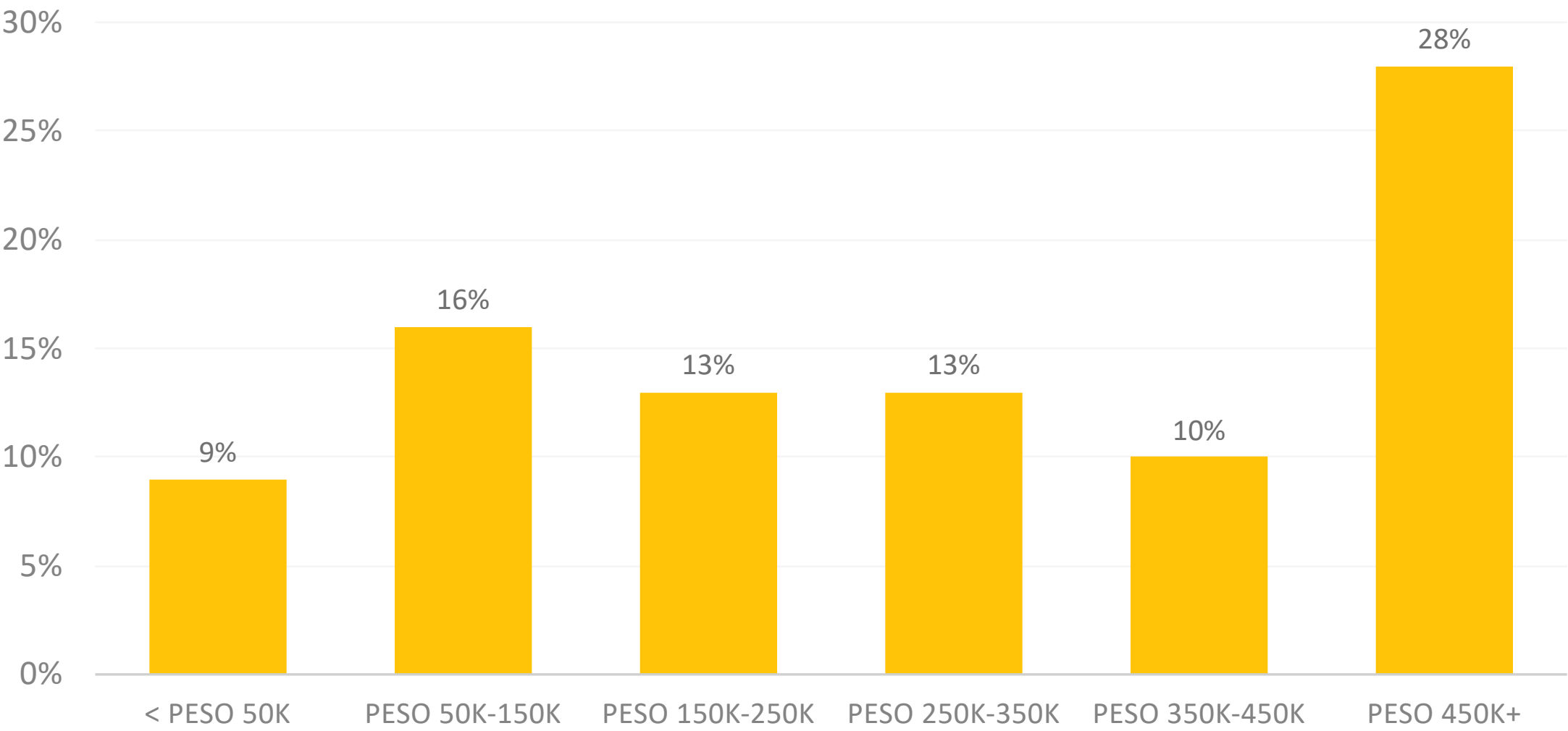
# AGE – SEGMENTATION

**GVB VISITOR SATISFACTION STUDY**  
**QF What was your age on your last birthday?**

		TOTAL	FAMILY	FIT	MICE
		-	-	-	-
QF	18-24	18%	14%	18%	100%
	25-39	51%	54%	52%	
	40-49	11%	11%	11%	
	50-59	12%	12%	12%	
	60+	7%	9%	7%	
	Total	107	57	106	1
QF	Mean	36.31	37.61	36.03	23.00
	Median	34	36	34	23

\*Prepared by Anthology Research\*

# HOUSEHOLD INCOME



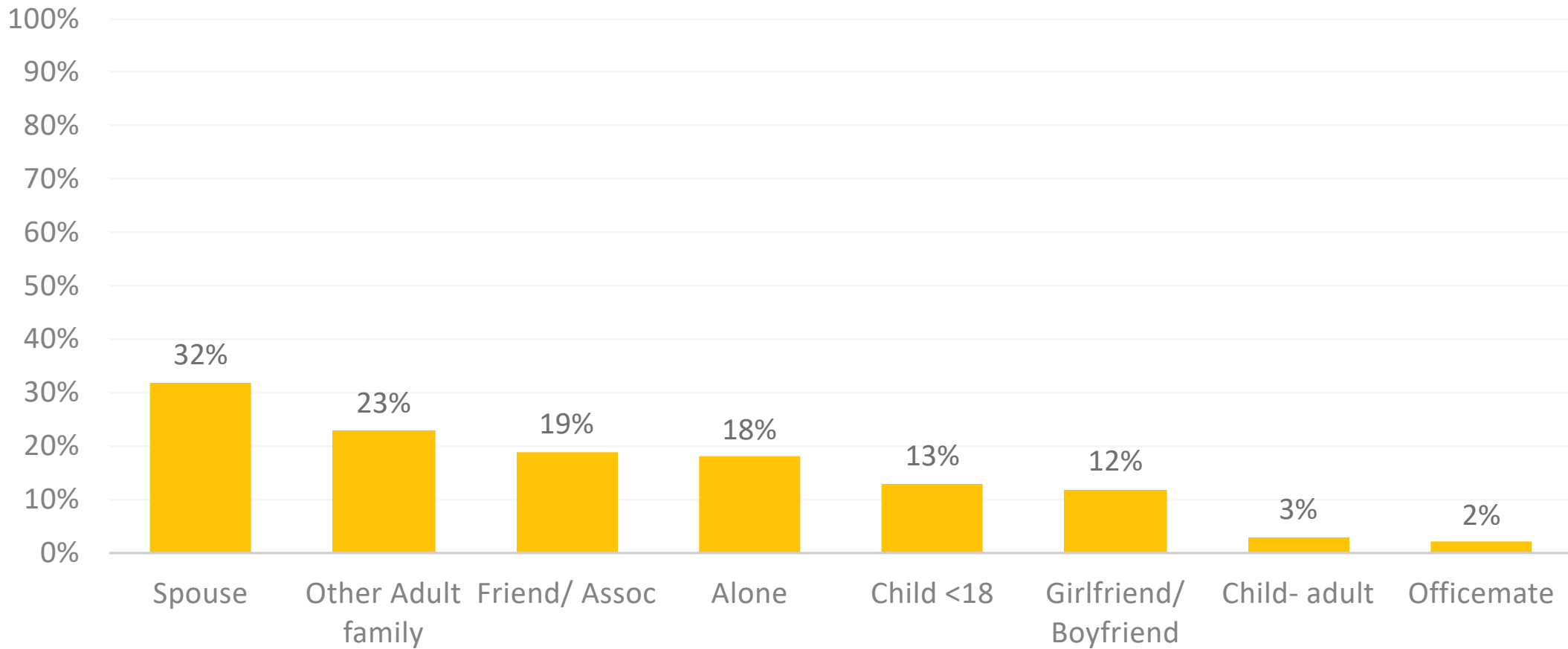
# HOUSEHOLD INCOME – SEGMENTATION

**GVB VISITOR SATISFACTION STUDY**  
**D2 What is your approximate annual household income, before taxes?**

		TOTAL	FAMILY	FIT	MICE
		-	-	-	-
D2	< PESO 50K	9%	5%	9%	
	PESO 50K-150K	16%	18%	16%	
	PESO 150K-250K	13%	9%	13%	
	PESO 250K-350K	13%	12%	13%	
	PESO 350K-450K	10%	9%	9%	
	PESO 450K+	28%	33%	28%	100%
	No income	10%	14%	10%	
	Total	107	57	106	1

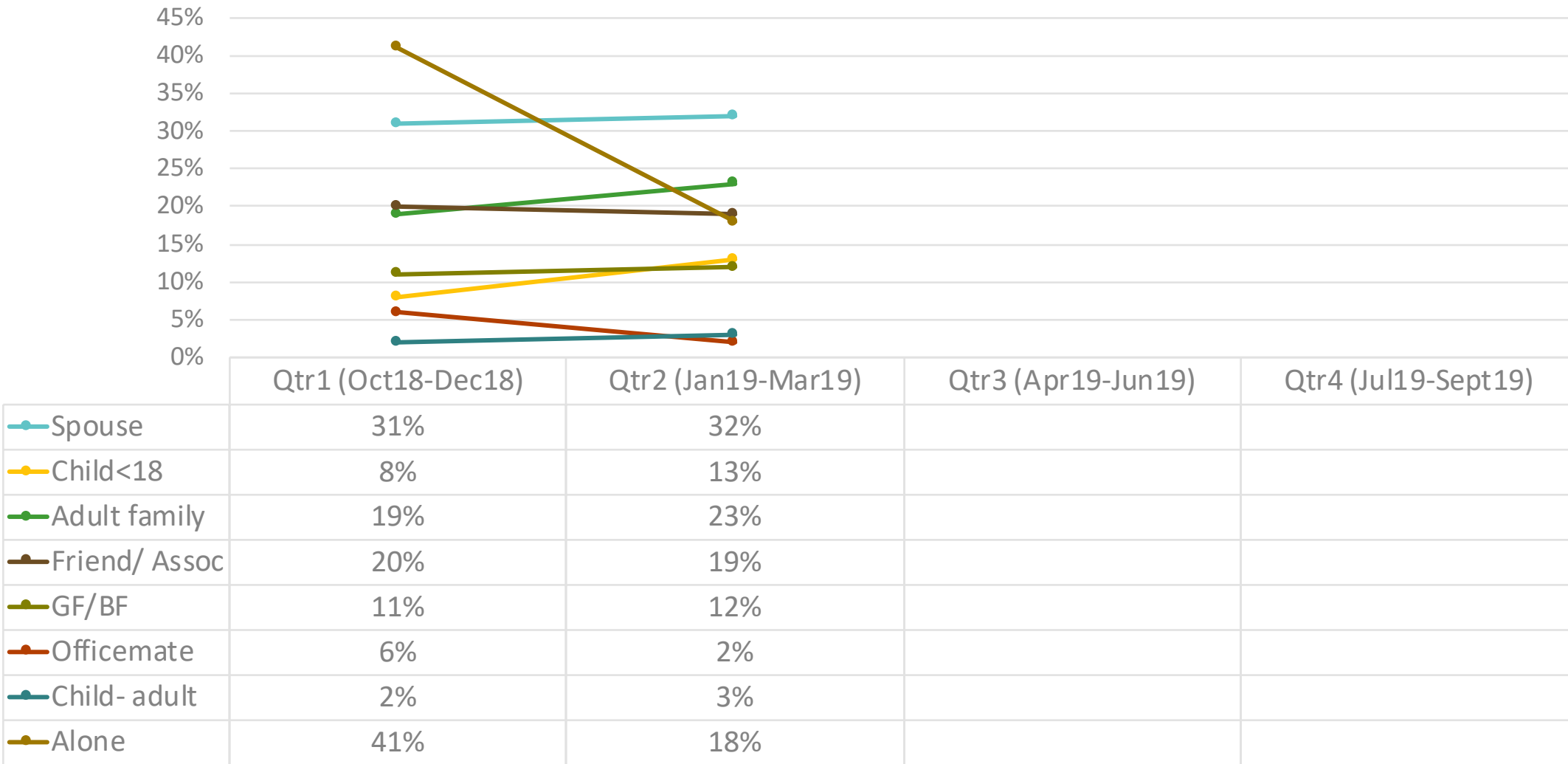
\*Prepared by Anthology Research\*

# TRAVEL PARTY

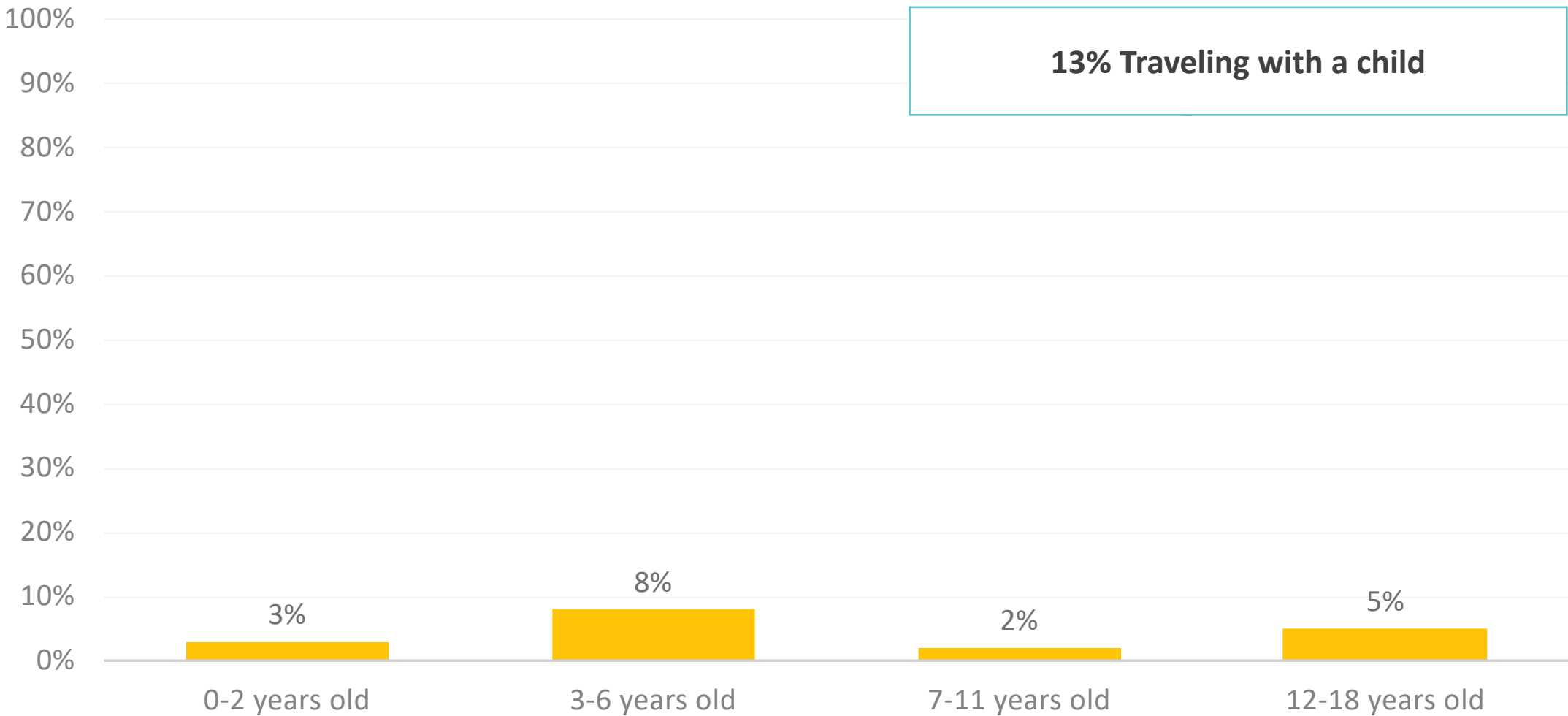




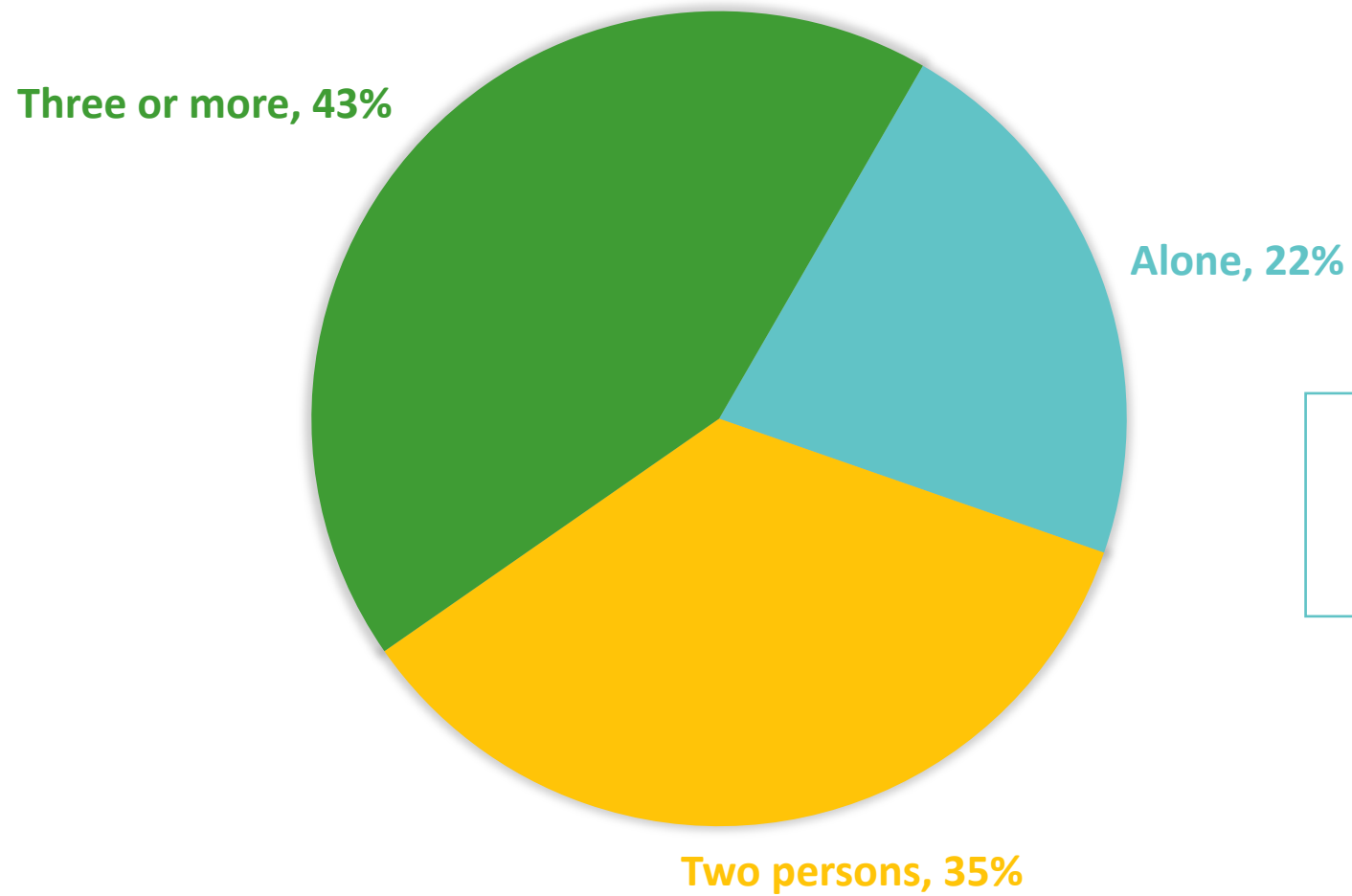
# TRAVEL PARTY – TRACKING



# TRAVEL PARTY – CHILD UNDER 18

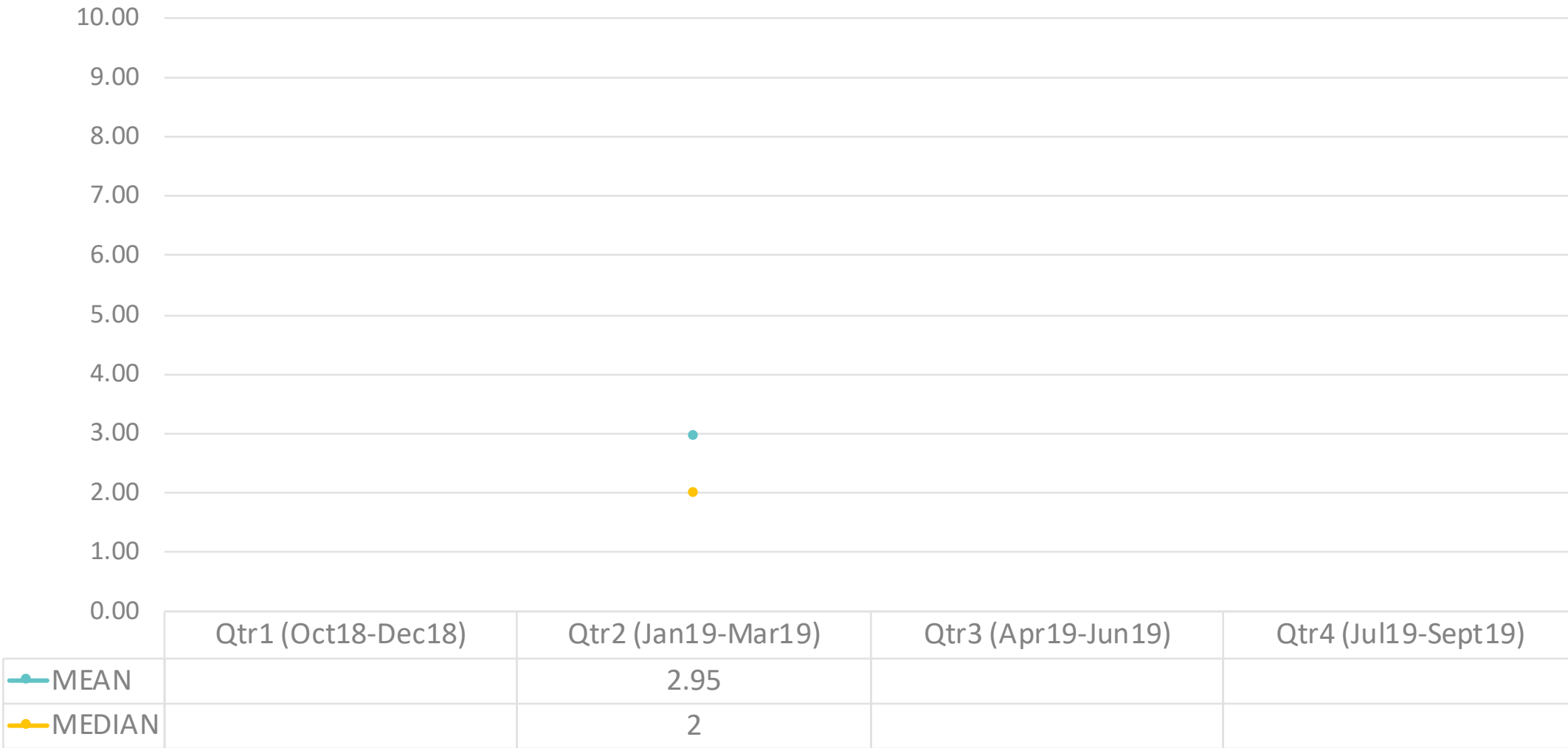


# TRAVEL PARTY SIZE



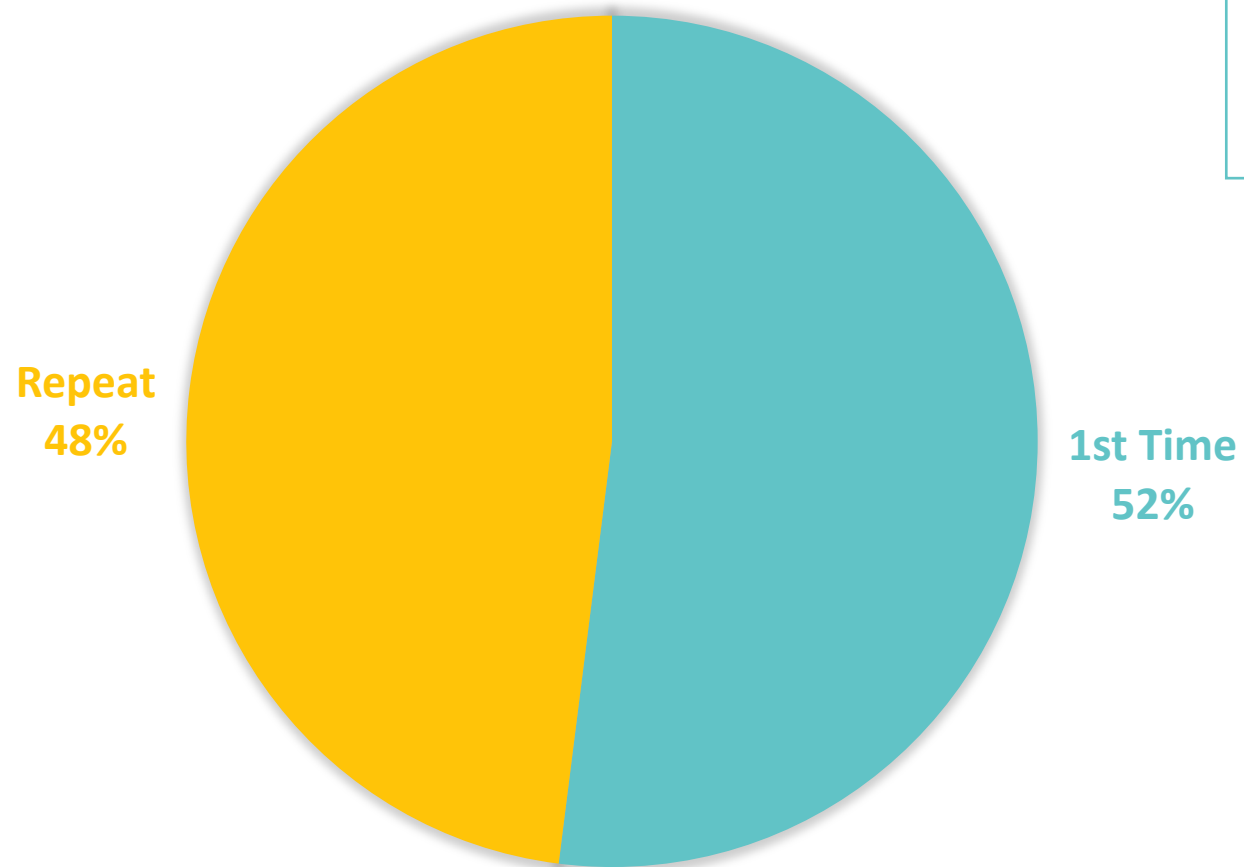
Mean = 2.95  
Median = 2

# TRAVEL PARTY SIZE – TRACKING



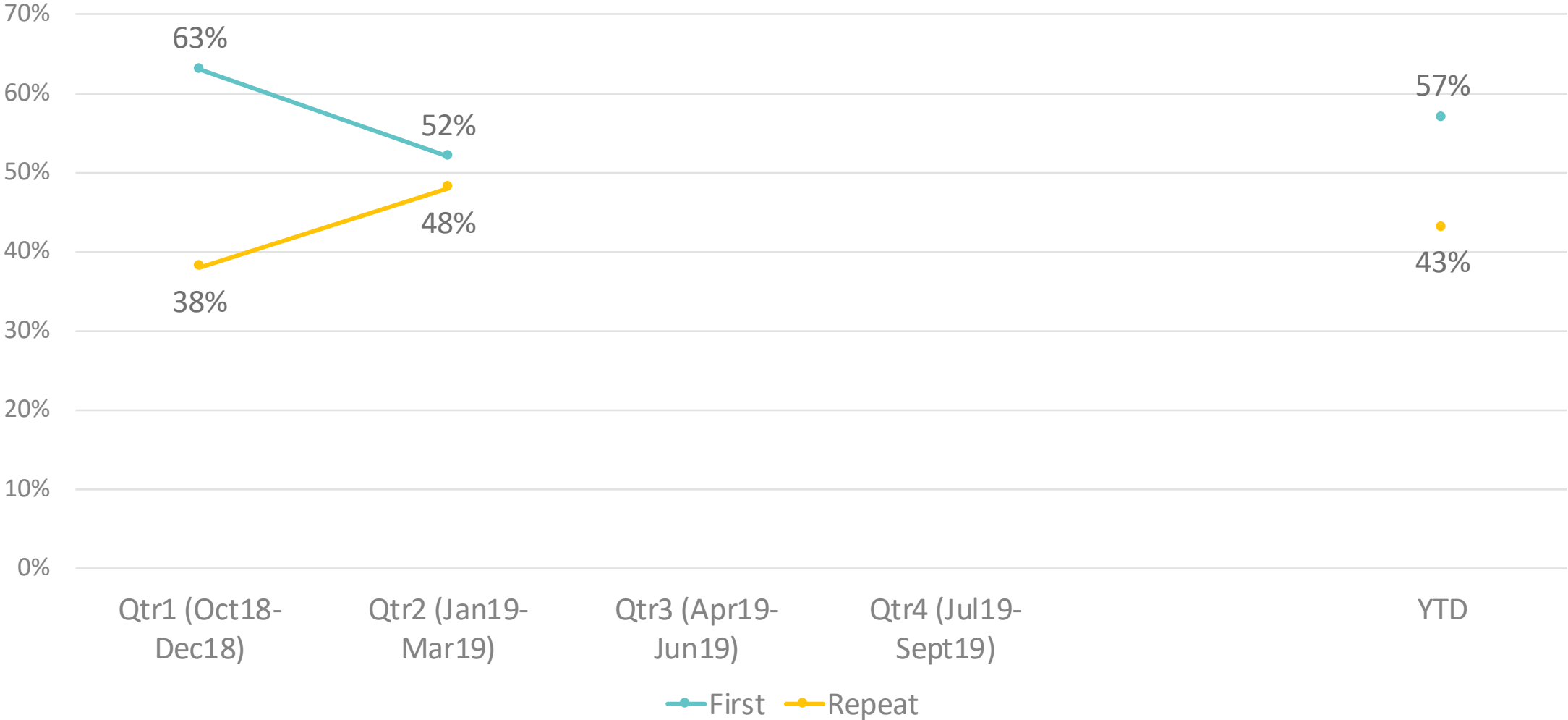


# TRIPS TO GUAM



Mean = 2.08  
Median = 1

# TRIPS TO GUAM – TRACKING



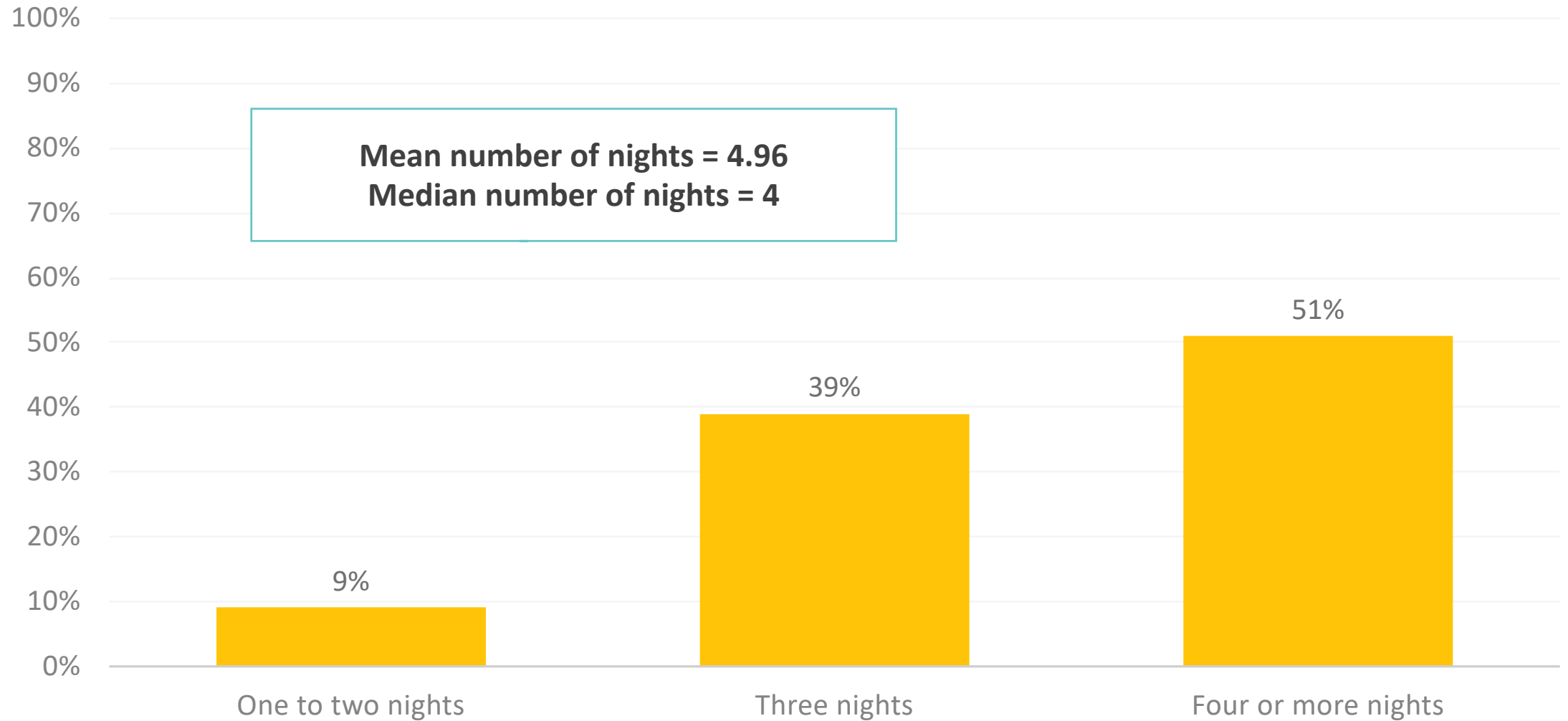
# TRIPS TO GUAM – SEGMENTATION

**GVB VISITOR SATISFACTION STUDY**  
**Q9 Including this trip, how many times have you been to Guam?**

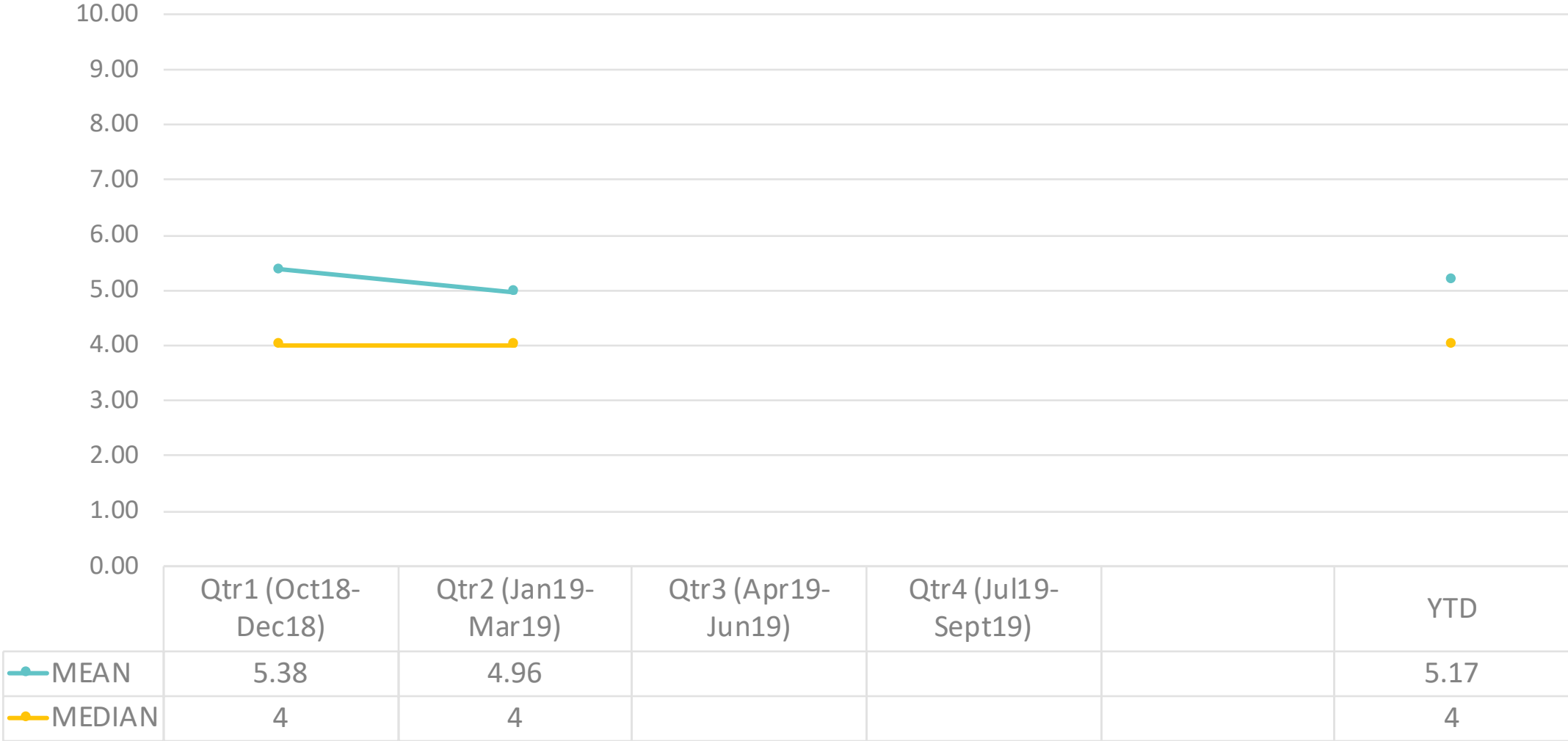
		TOTAL	FAMILY	FIT	MICE
		-	-	-	-
Q9	1st time	52%	49%	53%	
	Repeat	48%	51%	47%	100%
	Total	107	57	106	1
Q9	Mean	2.08	2.09	2.08	3.00
	Median	1	2	1	3

\*Prepared by Anthology Research\*

# LENGTH OF STAY



# LENGTH OF STAY – TRACKING



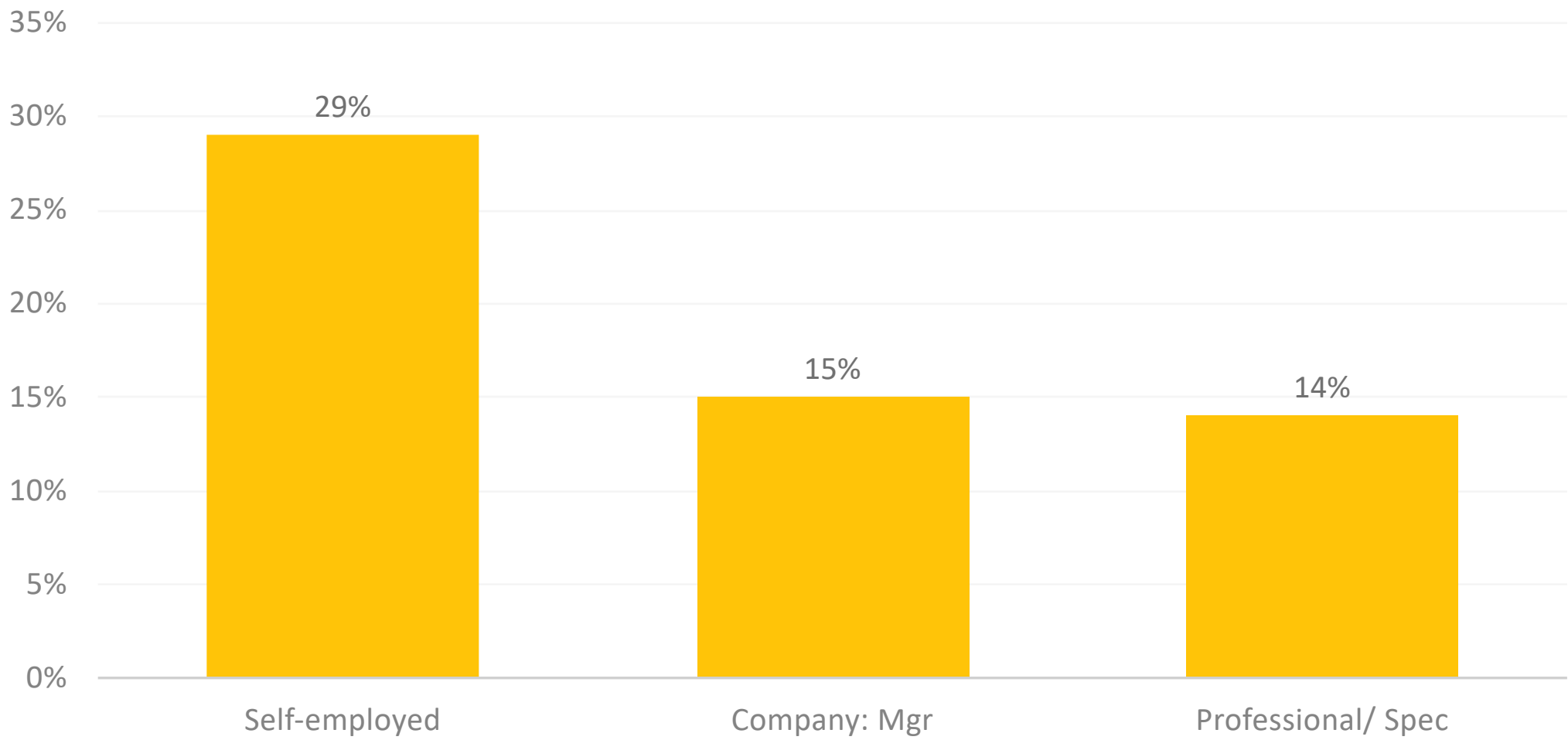
# LENGTH OF STAY – SEGMENTATION

**GVB VISITOR SATISFACTION STUDY**  
**SA How many nights did you stay on Guam?**

		TOTAL	FAMILY	FIT	MICE
		-	-	-	-
SA	1-2 nights	9%	9%	9%	100%
	3 nights	39%	40%	40%	
	4+	51%	51%	51%	
	Total	107	57	106	1
SA	Mean	4.96	5.79	4.94	3.00
	Median	4	4	4	3

\*Prepared by Anthology Research\*

# OCCUPATION – Top Responses (10%+)





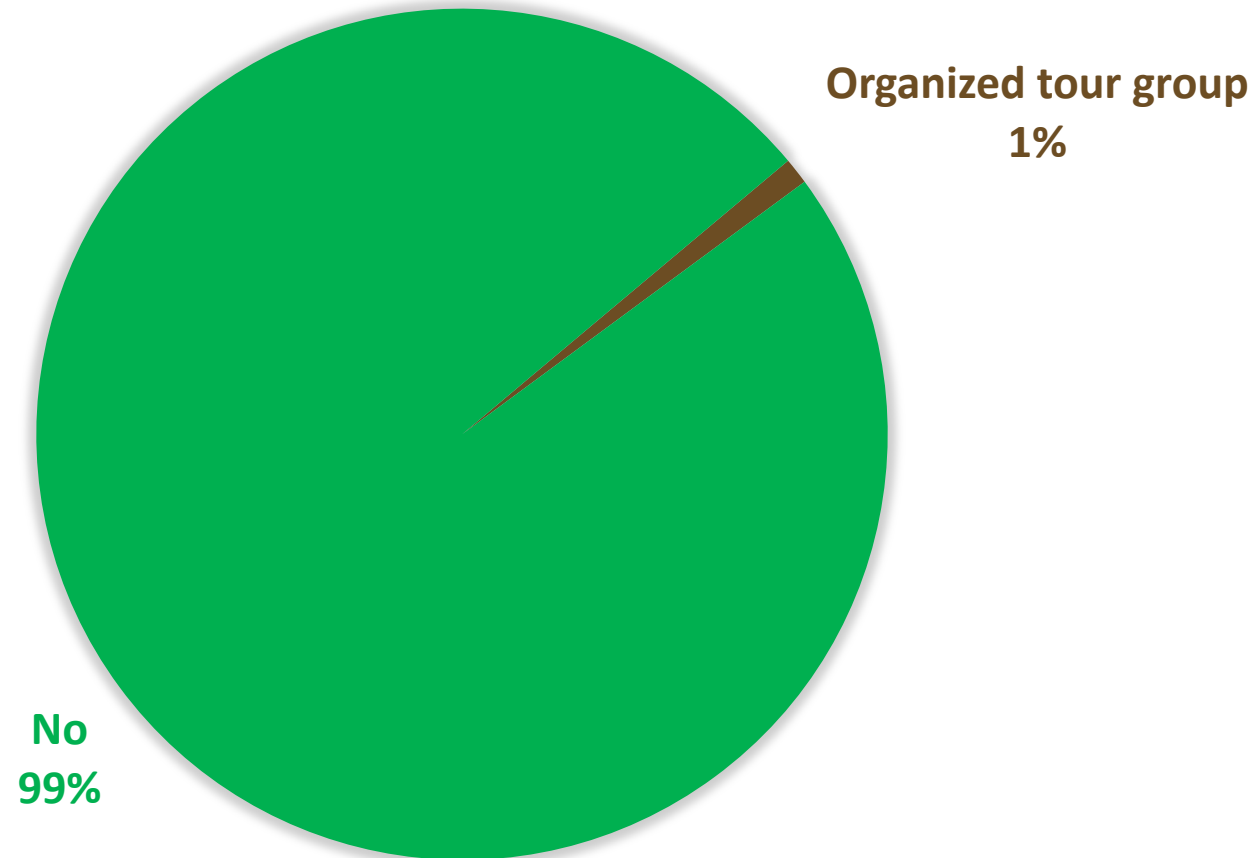
SECTION 2

# TRAVEL PLANNING

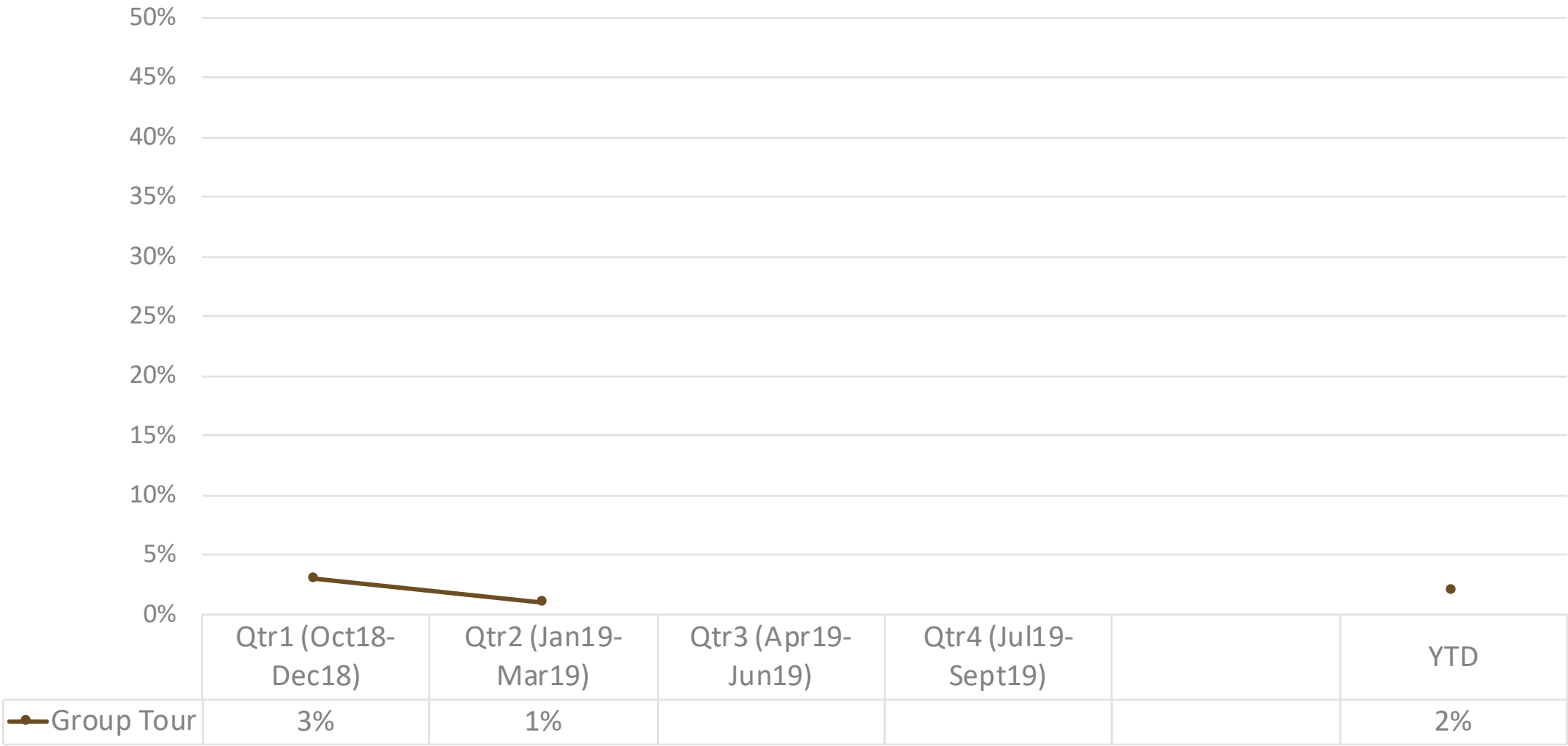




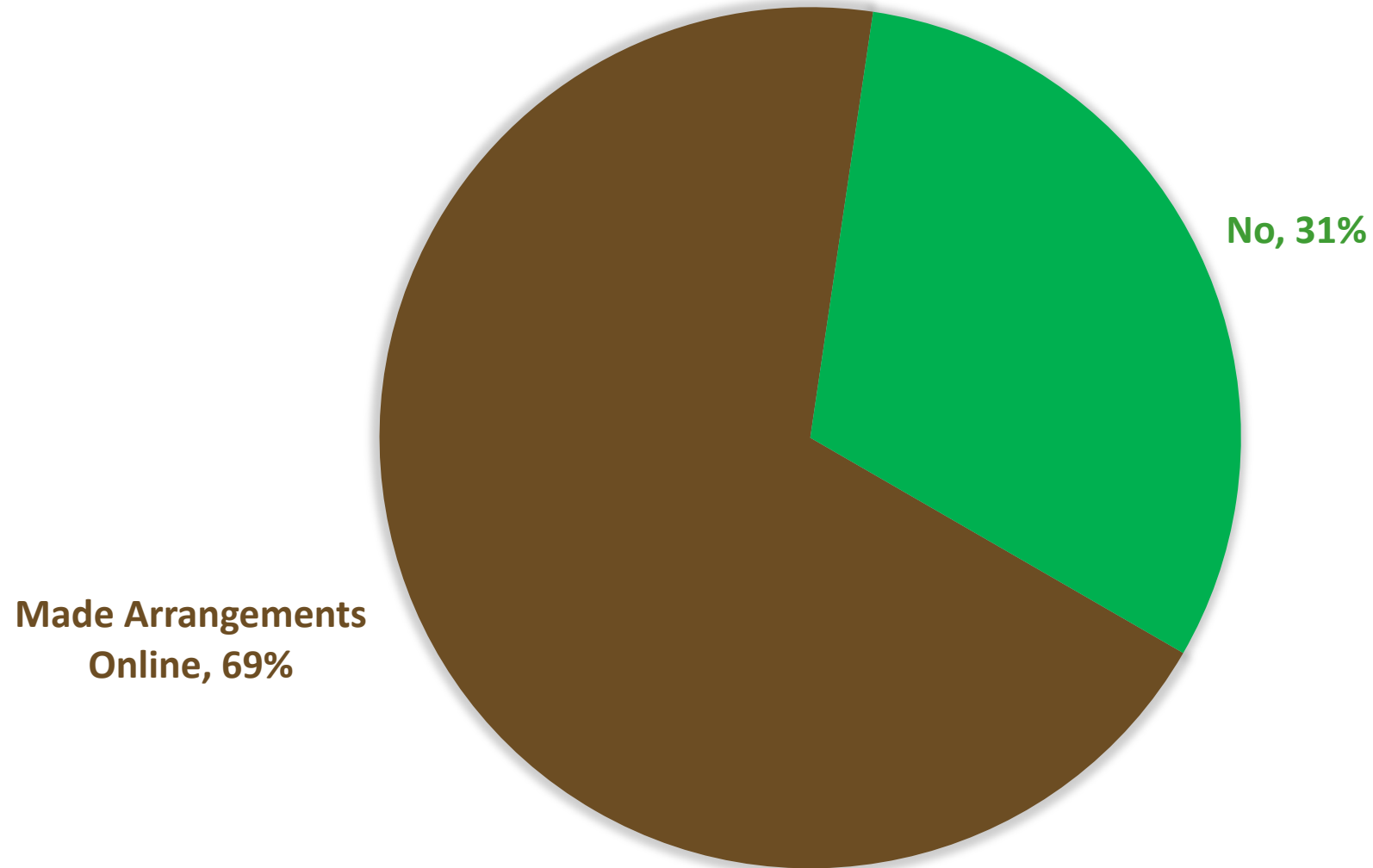
# ORGANIZED TOUR GROUP



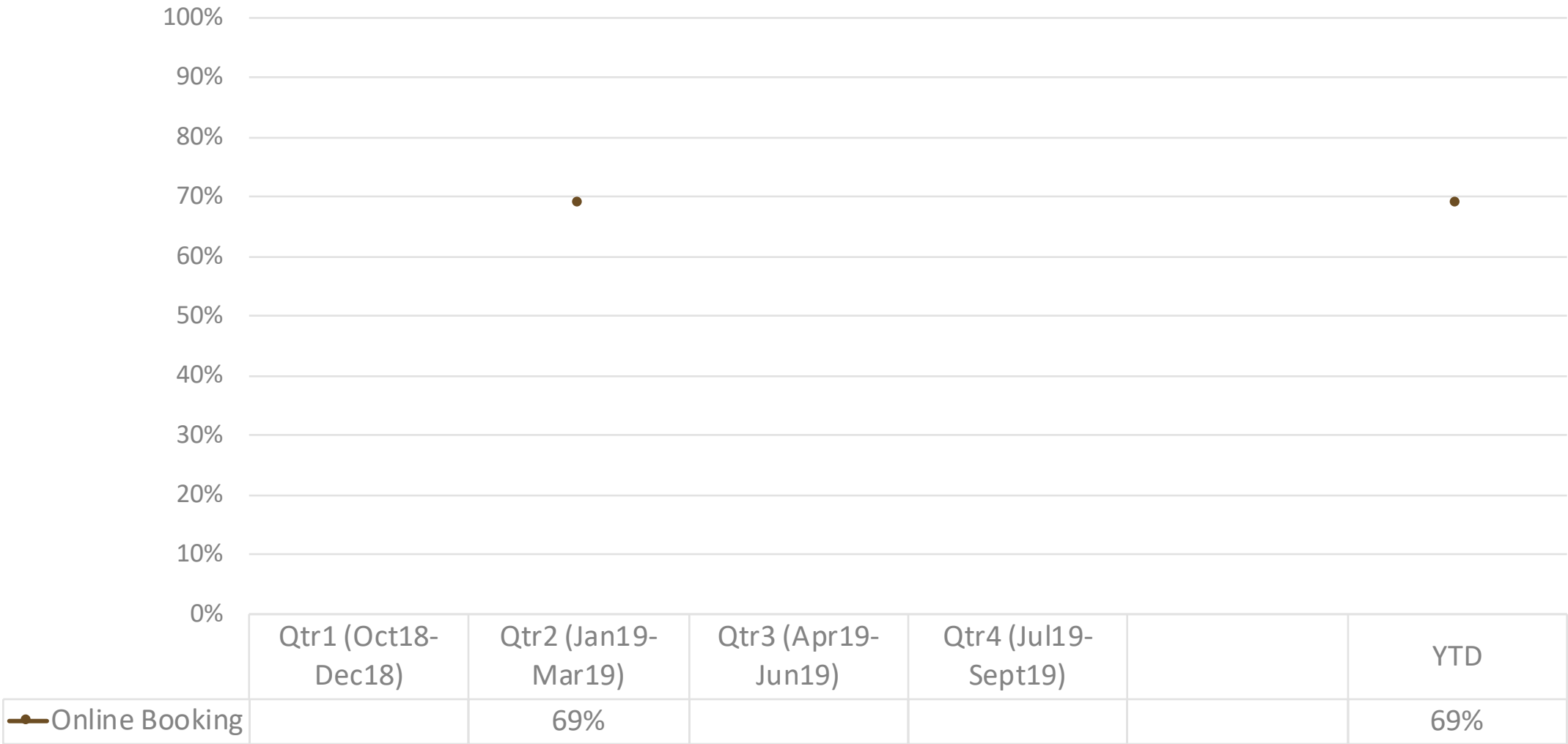
# ORGANIZED TOUR GROUP – TRACKING



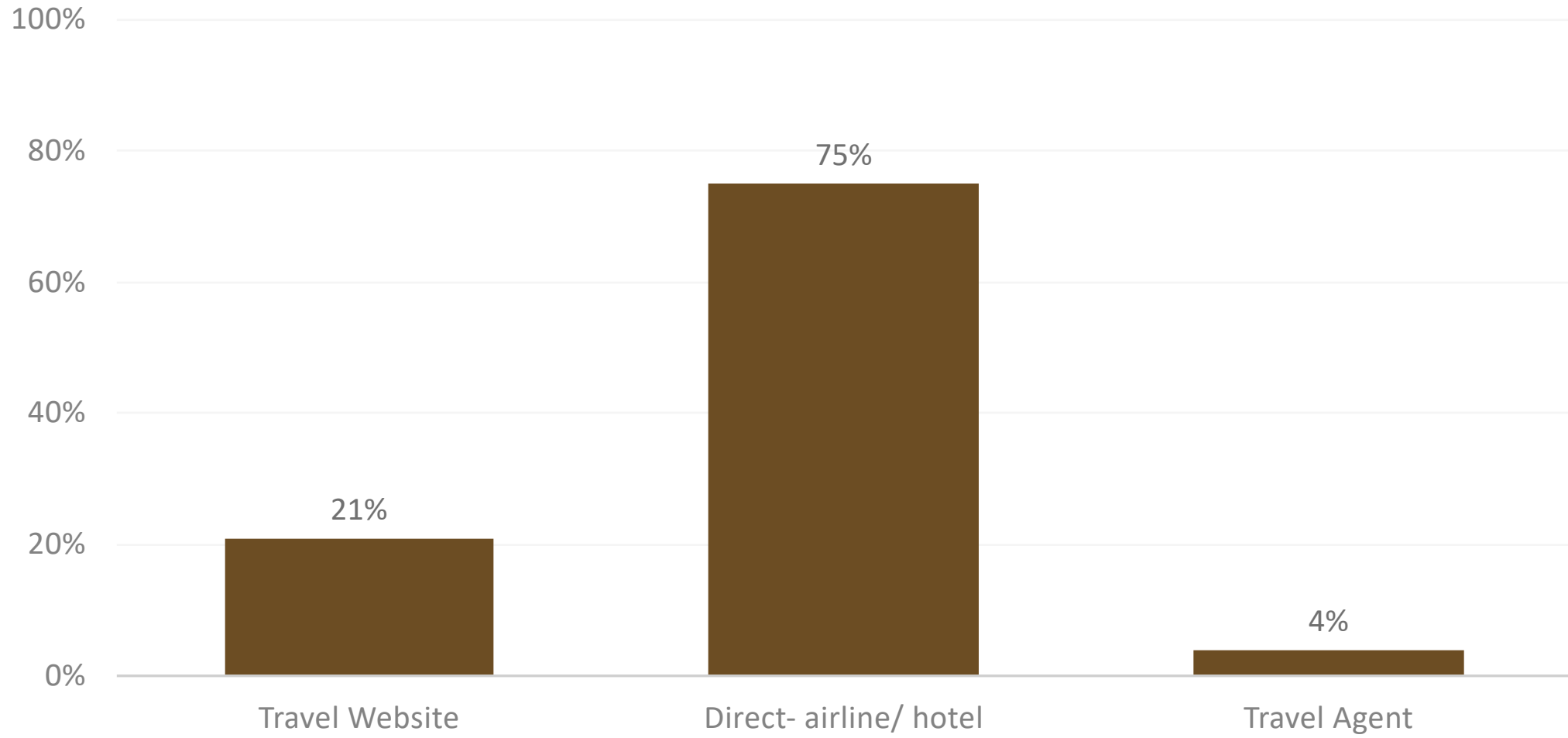
# ONLINE BOOKING



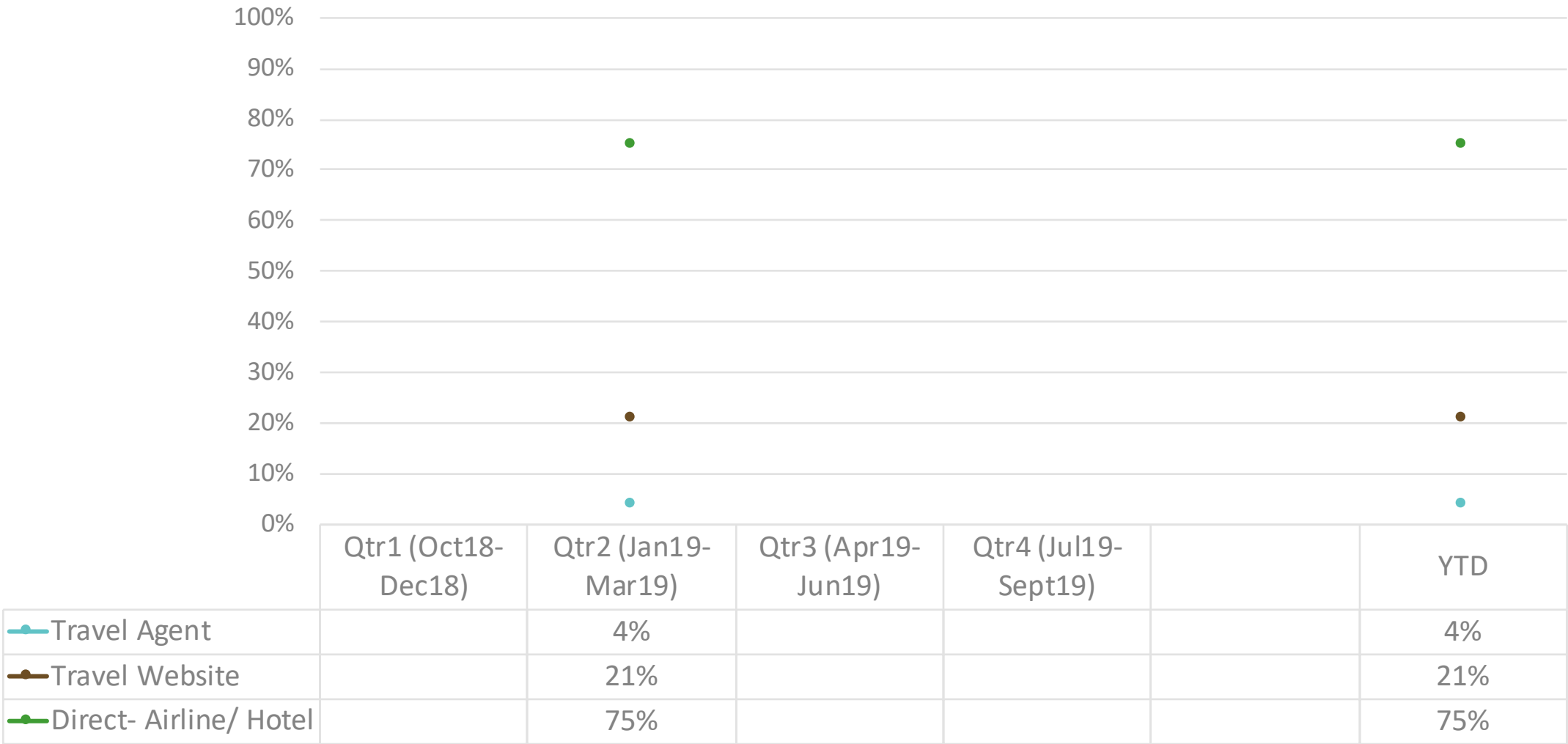
# ONLINE BOOKING – TRACKING



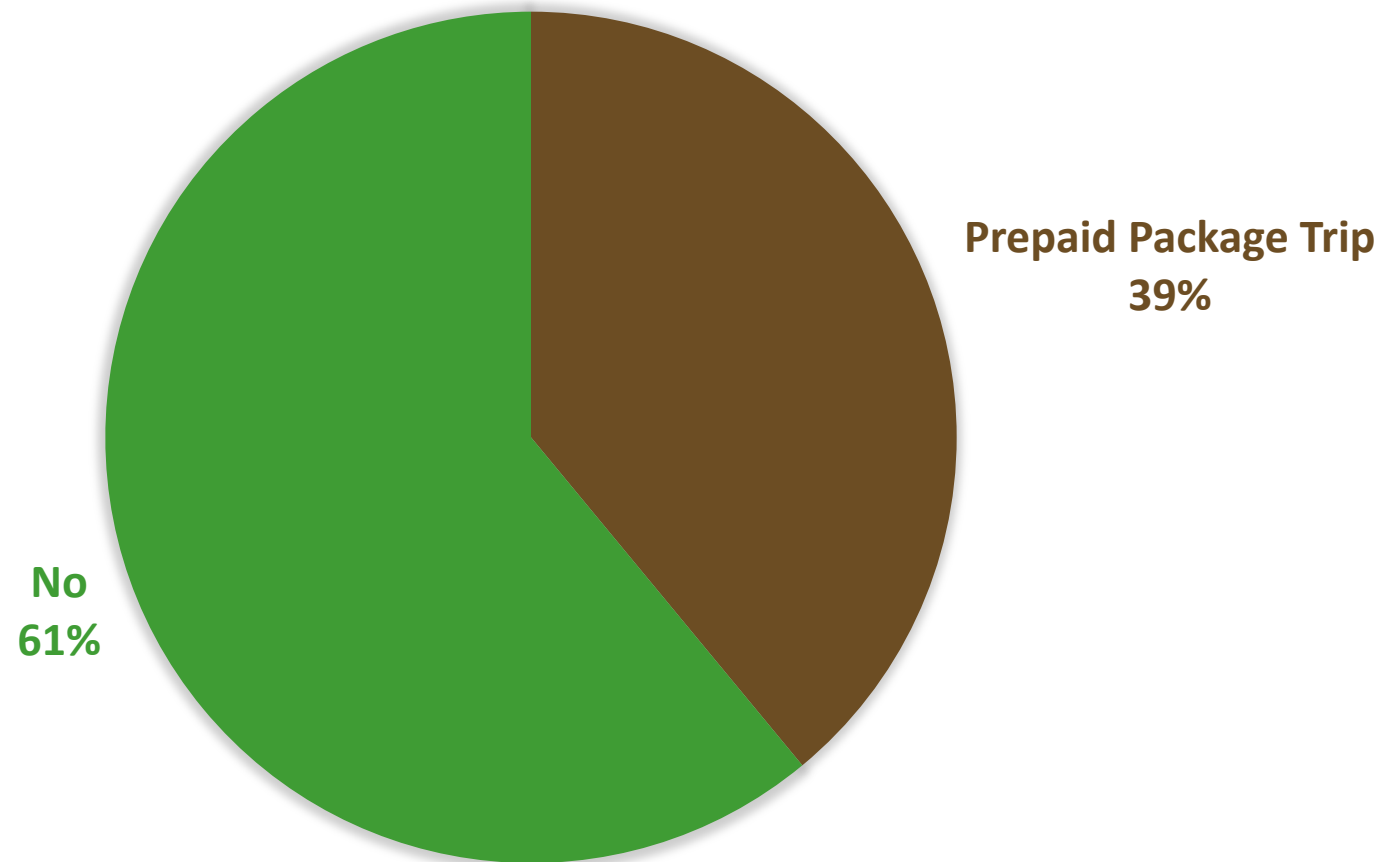
# TRAVEL ARRANGEMENTS



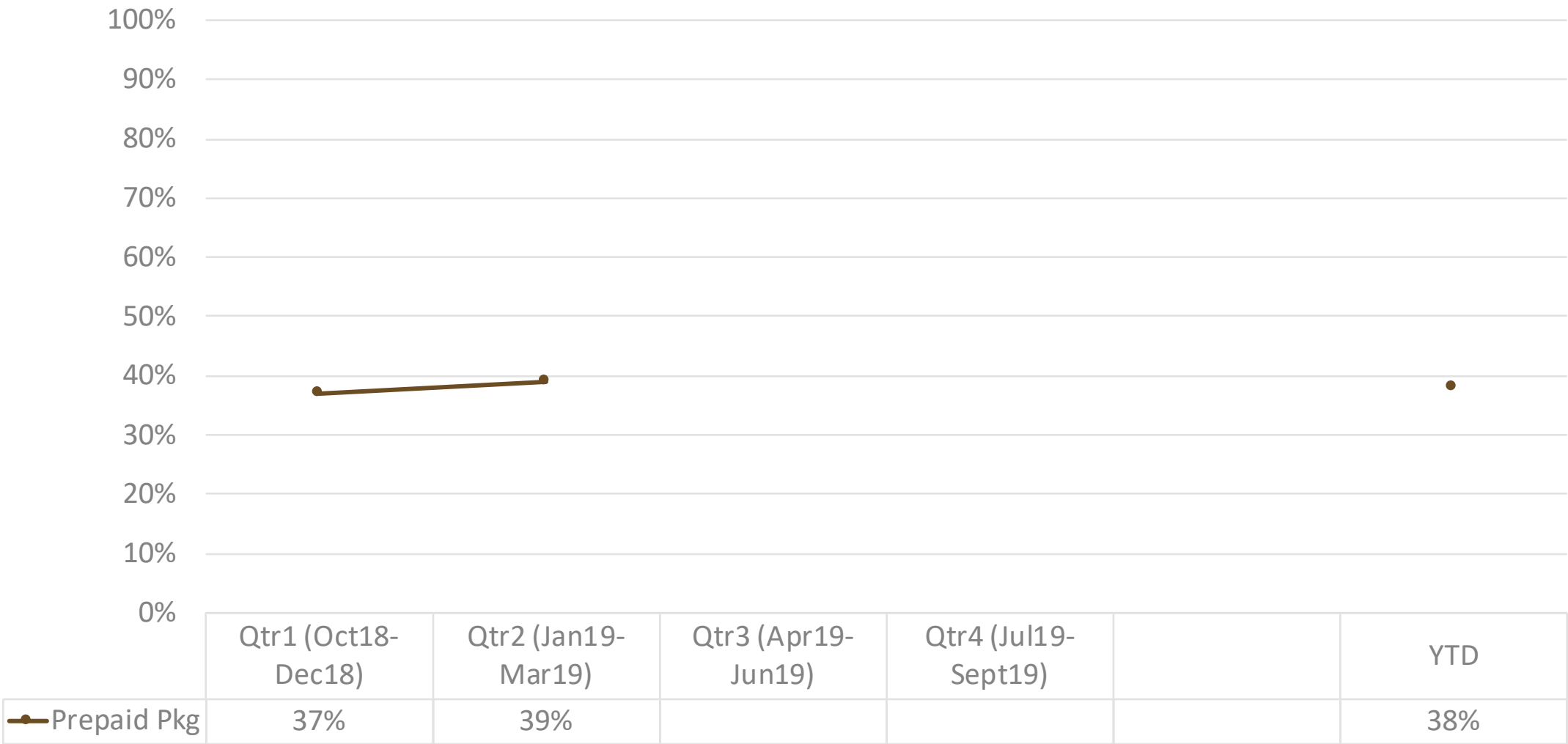
# TRAVEL ARRANGEMENTS – TRACKING



# PREPAID PACKAGE TRIP

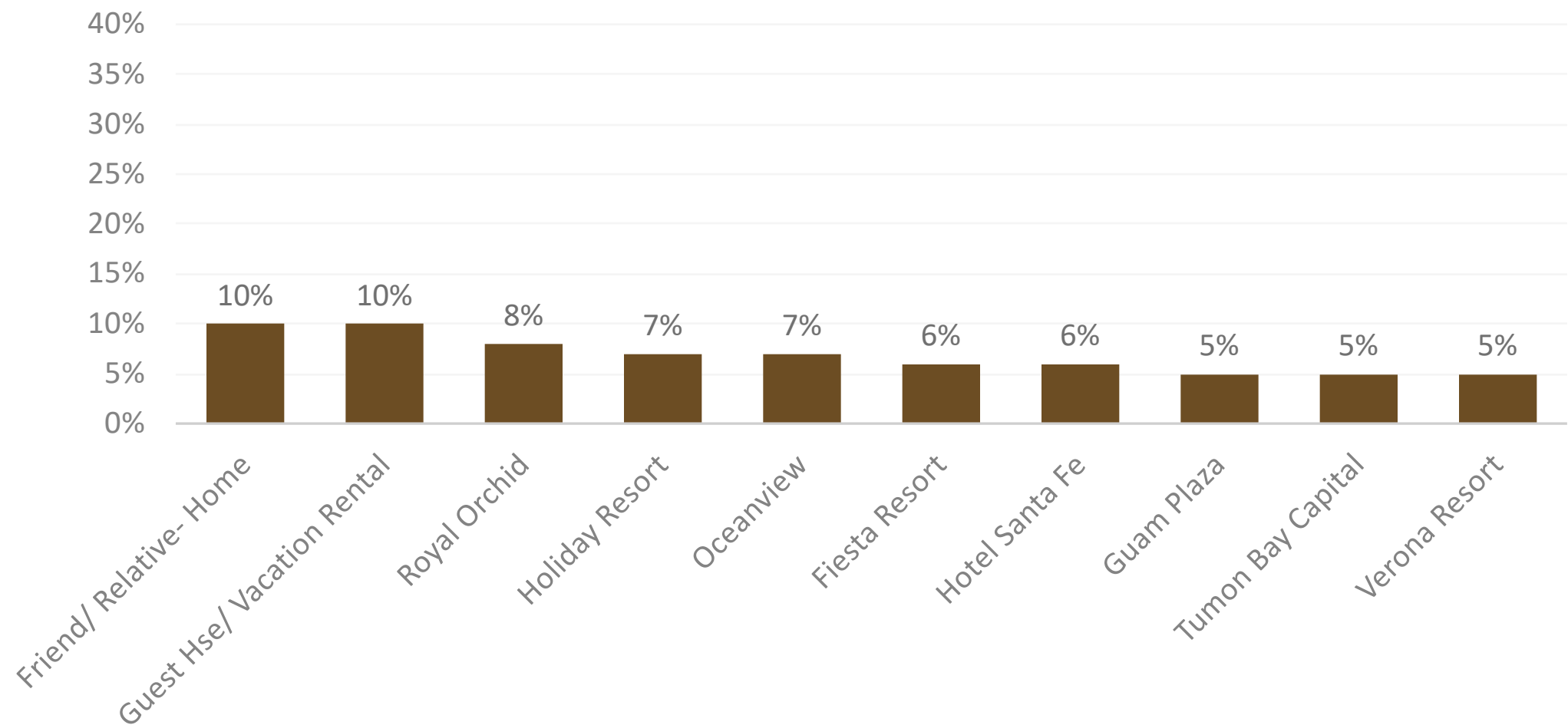


# PREPAID PACKAGE TRIP

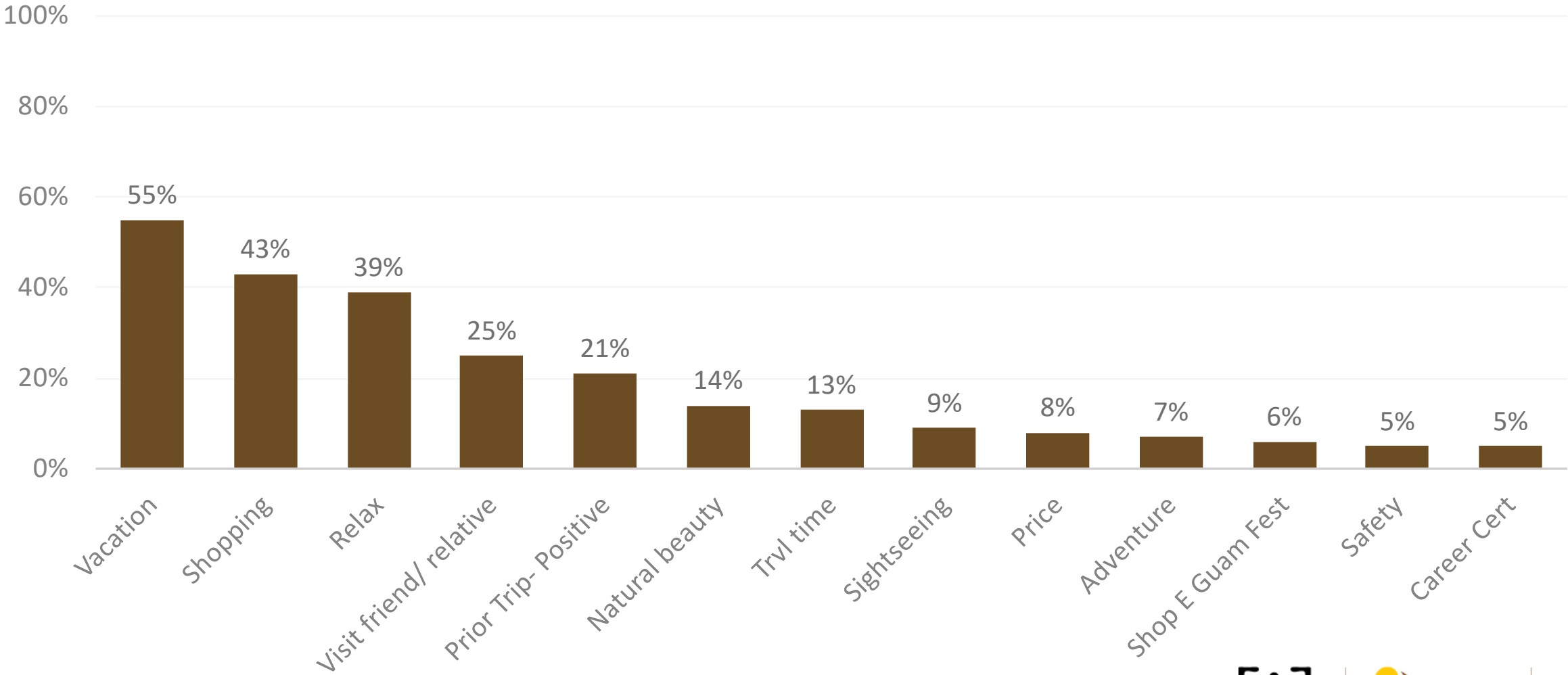




# ACCOMMODATIONS (5%+)



# TRAVEL MOTIVATIONS (10%+)



# TRAVEL MOTIVATIONS – SEGMENTATION

**GVB VISITOR SATISFACTION STUDY**  
**Q8 What top three reasons motivated you to travel to Guam on this trip?**

		TOTAL	QTR FY2019	MONTH FY2019		
		-	Qtr2 (Jan-19-Mar-19)	Jan-19	Feb-19	Mar-19
Q8	Vacation	55%	55%	52%	47%	63%
	Shopping	43%	43%	35%	55%	37%
	Just to relax	39%	39%	13%	53%	41%
	To visit friends or relatives	25%	25%	26%	21%	28%
	A previous visit	21%	21%	39%	11%	20%
	Beautiful seas, beaches, tropical climate	14%	14%	13%	21%	9%
	Short travel time (not too far from home)	13%	13%	9%	21%	9%
	Sightseeing/ visiting tourist spots	9%	9%	9%	11%	9%
	Price of the tour package	8%	8%	4%	11%	9%
	Adventure	7%	7%	9%	5%	9%
	Shop Guam e-Festival	6%	6%	4%	8%	4%
	It is a safe place to spend a vacation	5%	5%	9%	3%	4%
	Career certification/ testing	5%	5%	13%	3%	2%
	Recommendation of friend/ relative/ travel agency	4%	4%	4%	5%	2%
	Water sports (snorkeling, windsurfing, parasailing)	3%	3%	4%	3%	2%
	Company/ business trip	3%	3%	13%		
	Government or military	2%	2%			4%
	To golf	1%	1%			2%
	Honeymoon	1%	1%			2%
	Organized sporting activity/ event	1%	1%			2%
	Incentive trip	1%	1%		3%	
	School trip	1%	1%	4%		
	Social Media networks	1%	1%	4%		
	Total	107	107	23	38	46

\*Prepared by Anthology Research\*



## SECTION 3

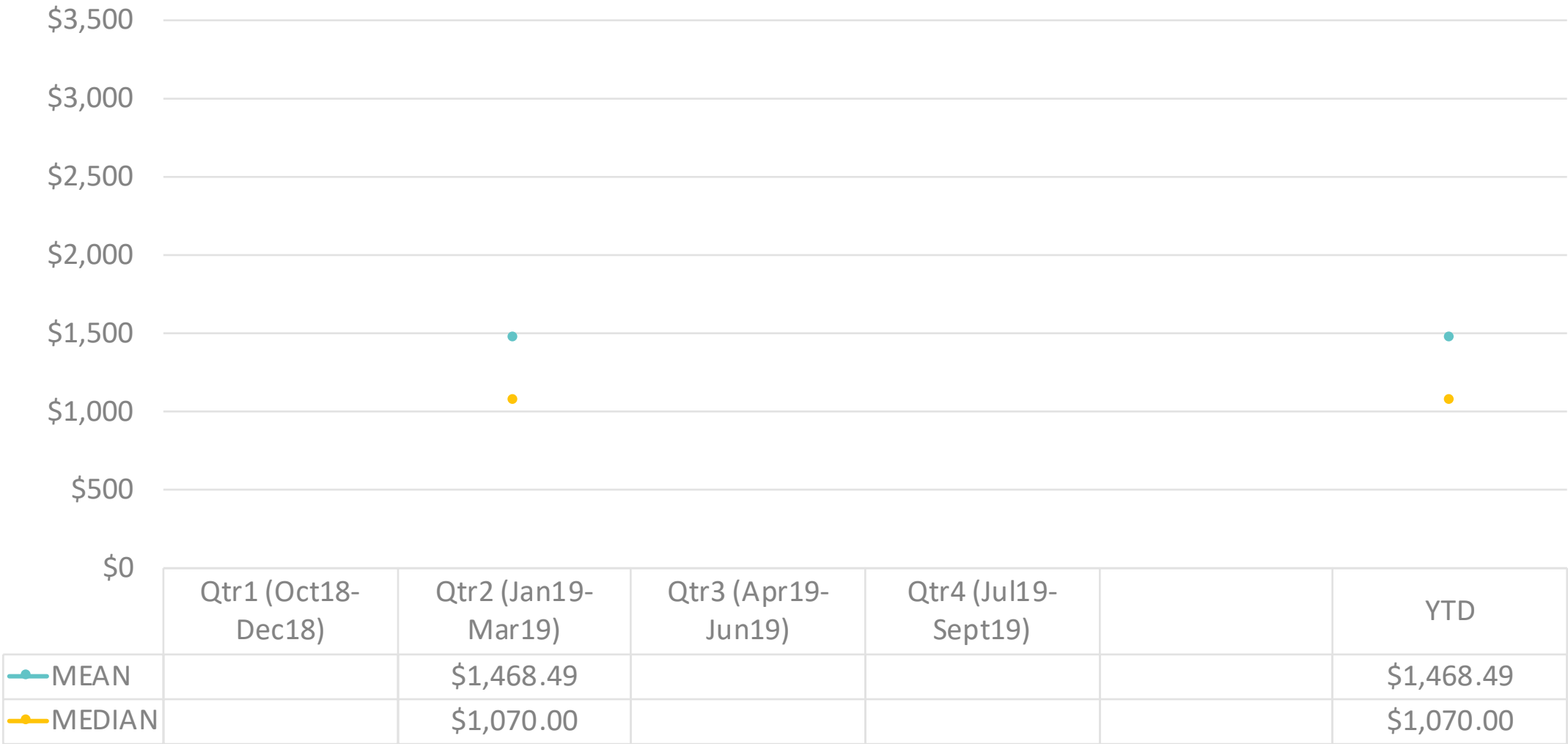
# EXPENDITURES



# PREPAID PACKAGE EXPENDITURES

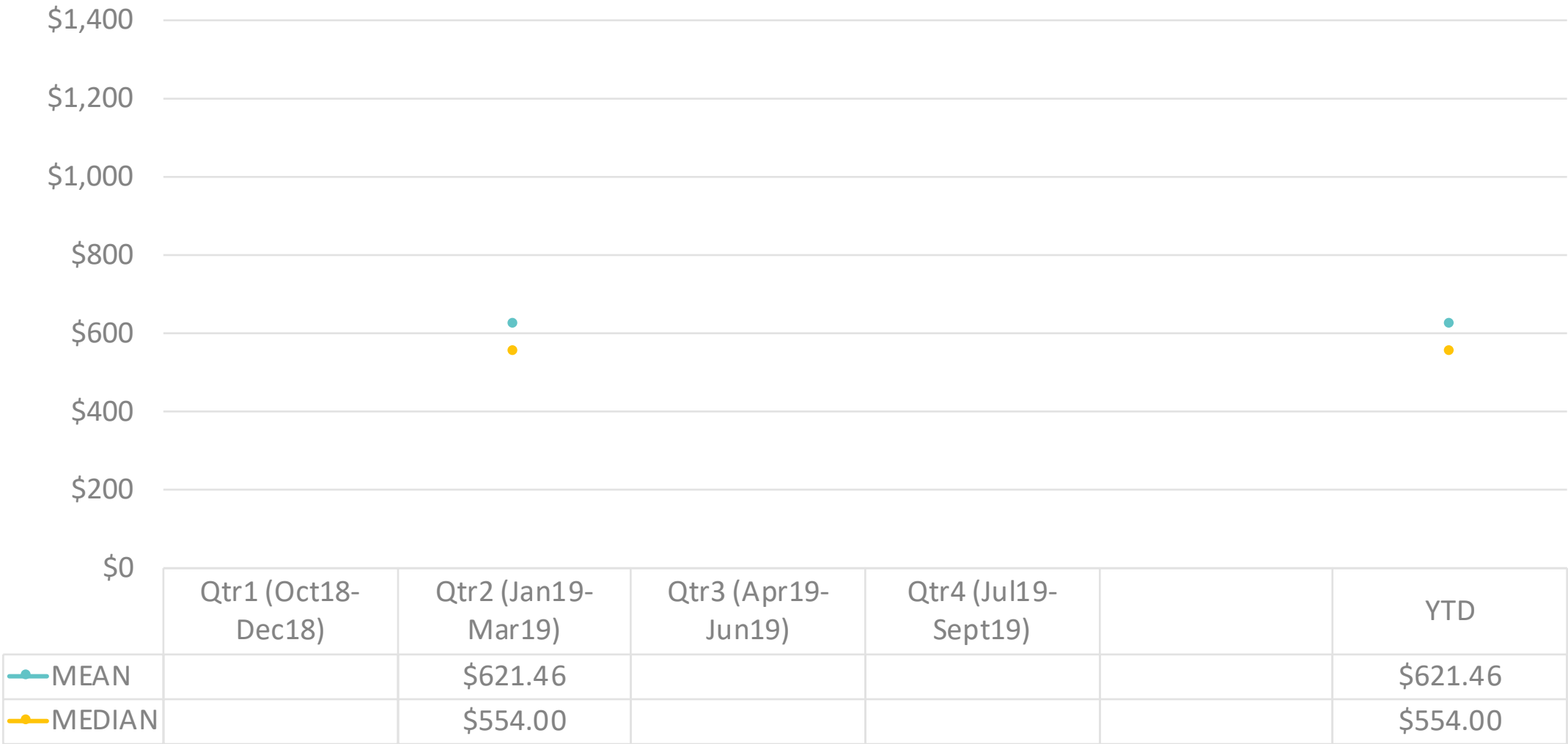
- \$1,468.49 = overall mean average prepaid package expense (for entire travel party) by respondent
- \$621.46 = overall mean average **per person** prepaid package expenditures

# PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING





# PREPAID PACKAGE – PER PERSON EXPENSE TRACKING



# PREPAID PACKAGE – PER PERSON EXPENSE SEGMENTATION

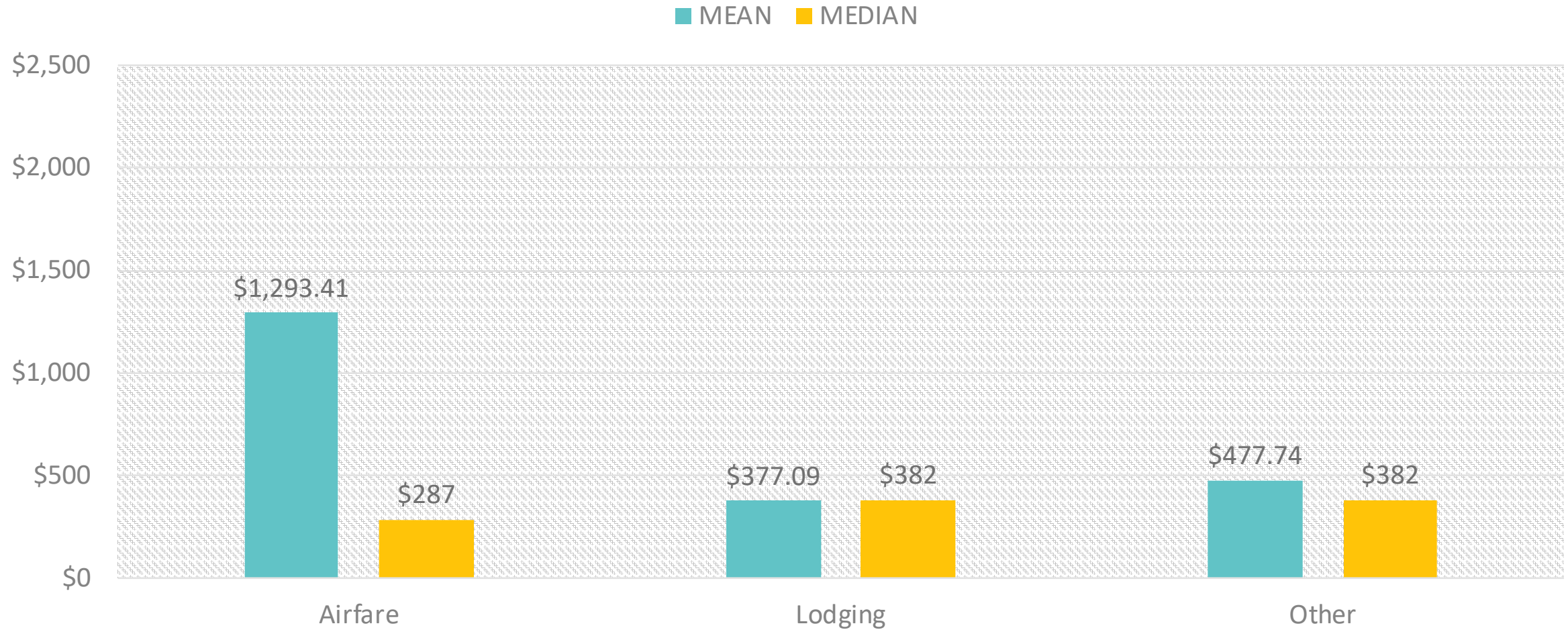
**GVB VISITOR SATISFACTION STUDY**  
**Q20 How much did the total prepaid package trip cost for you and other members of your covered travel party? PER PERSON**

		TOTAL	FAMILY	FIT	MICE
		-	-	-	-
PREPAID PKG PER PERSON	Mean	\$621.46	\$666.36	\$621.46	.
	Median	\$554	\$545	\$554	.

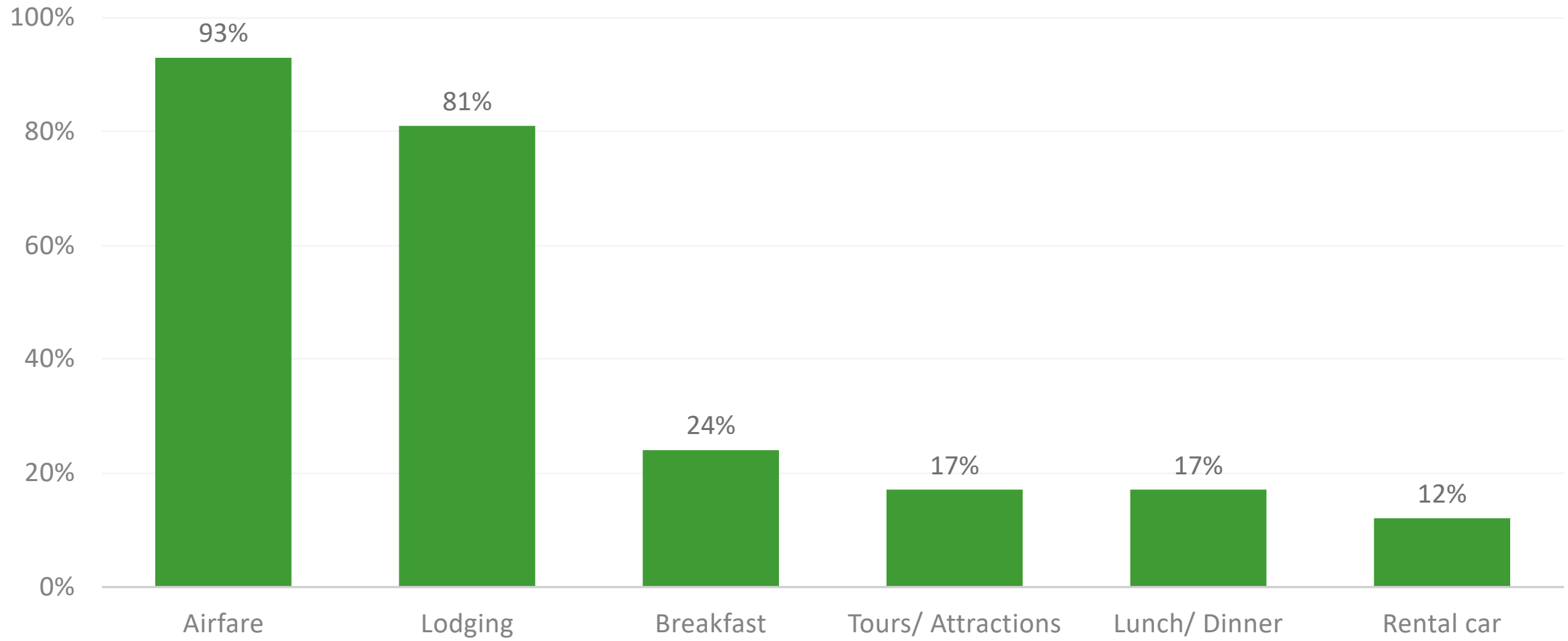
\*Prepared by Anthology Research\*



# PREPAID PACKAGE – BREAKDOWN



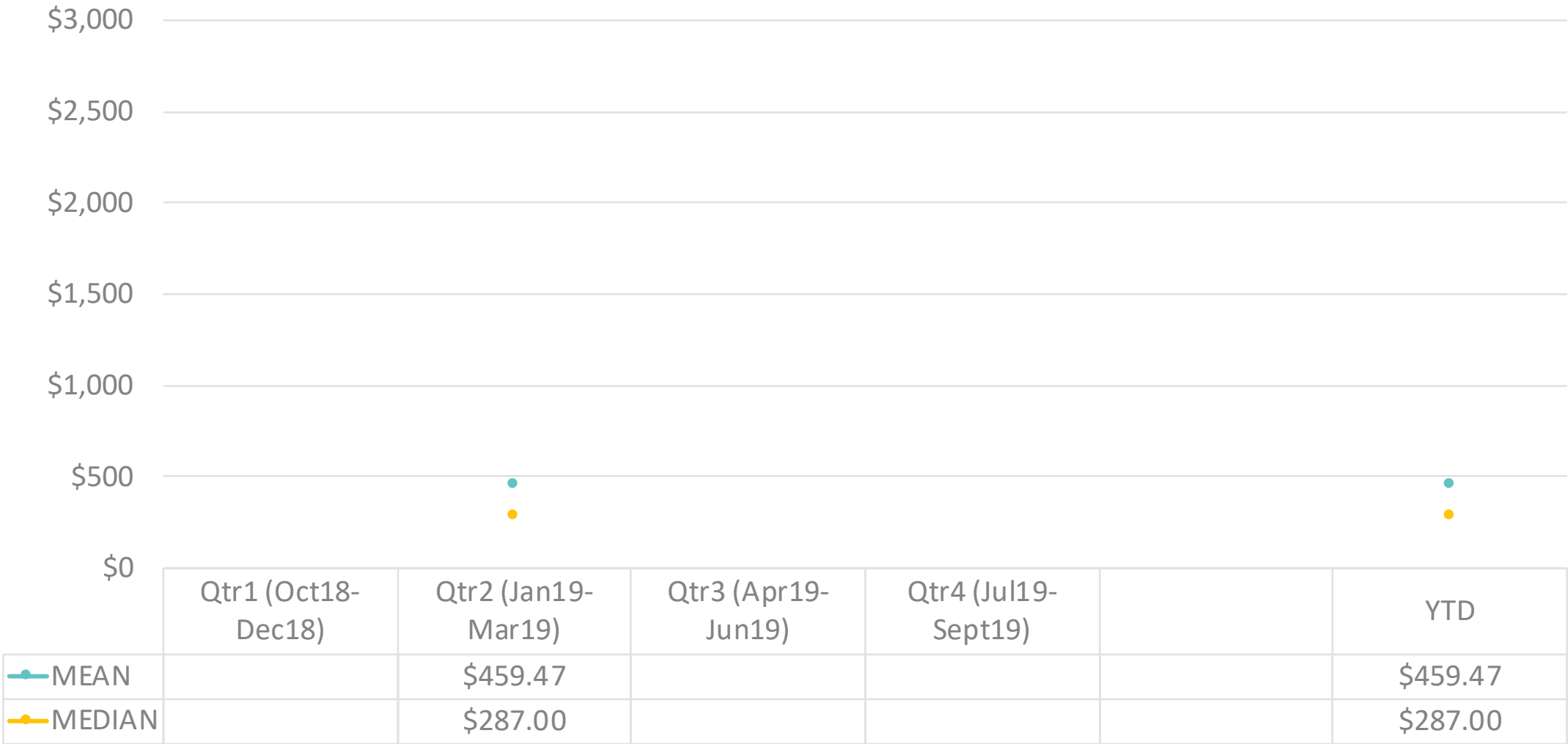
# PREPAID PACKAGE – BREAKDOWN



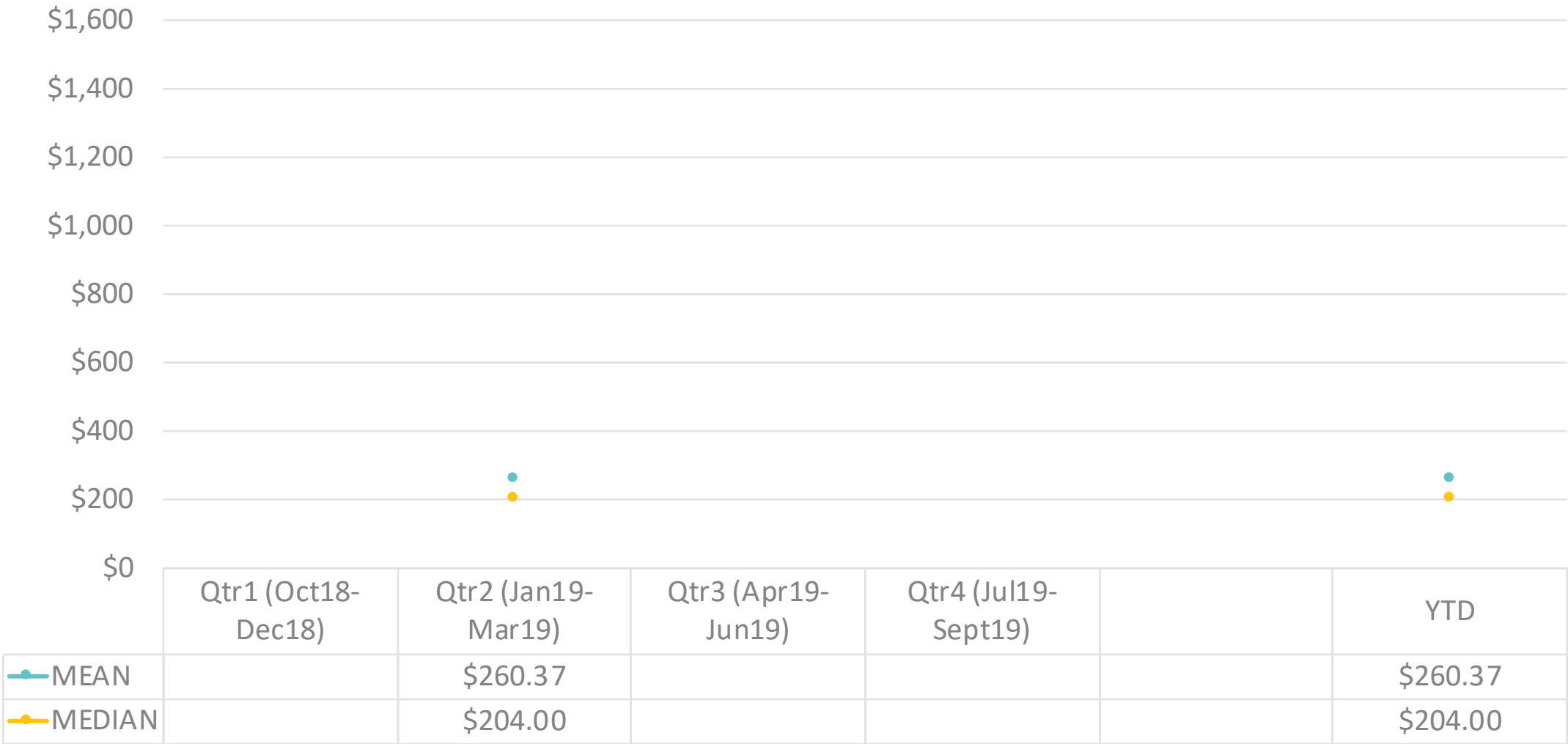
# AIRFARE – FIT TRAVELER

- \$459.47 = overall mean average airfare expense (for entire travel party) by respondent
- \$260.37 = overall mean average **per person** airfare expenditures

# AIRFARE – FIT TRAVELER (GROUP) TRACKING



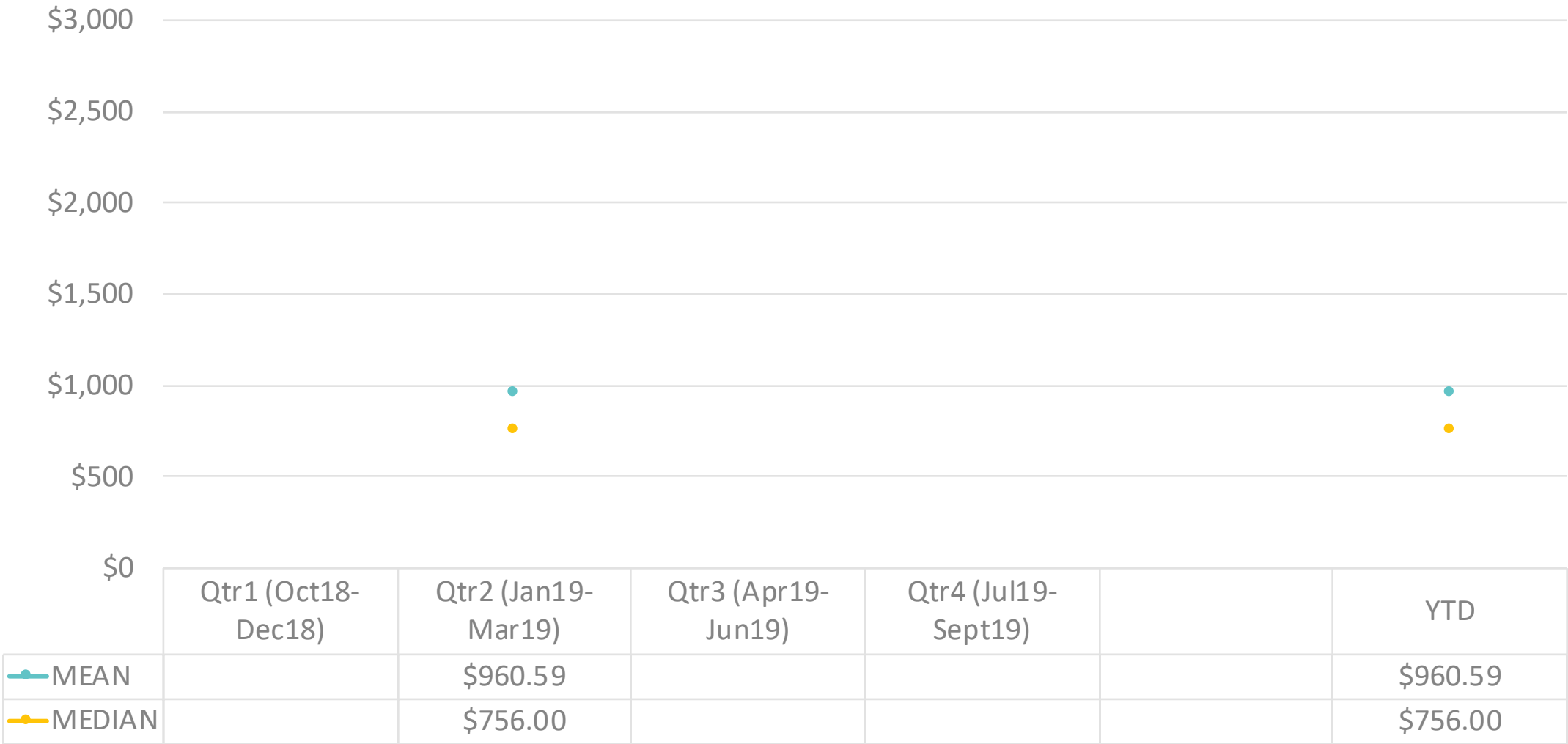
# AIRFARE – FIT TRAVELER (Per Person) TRACKING



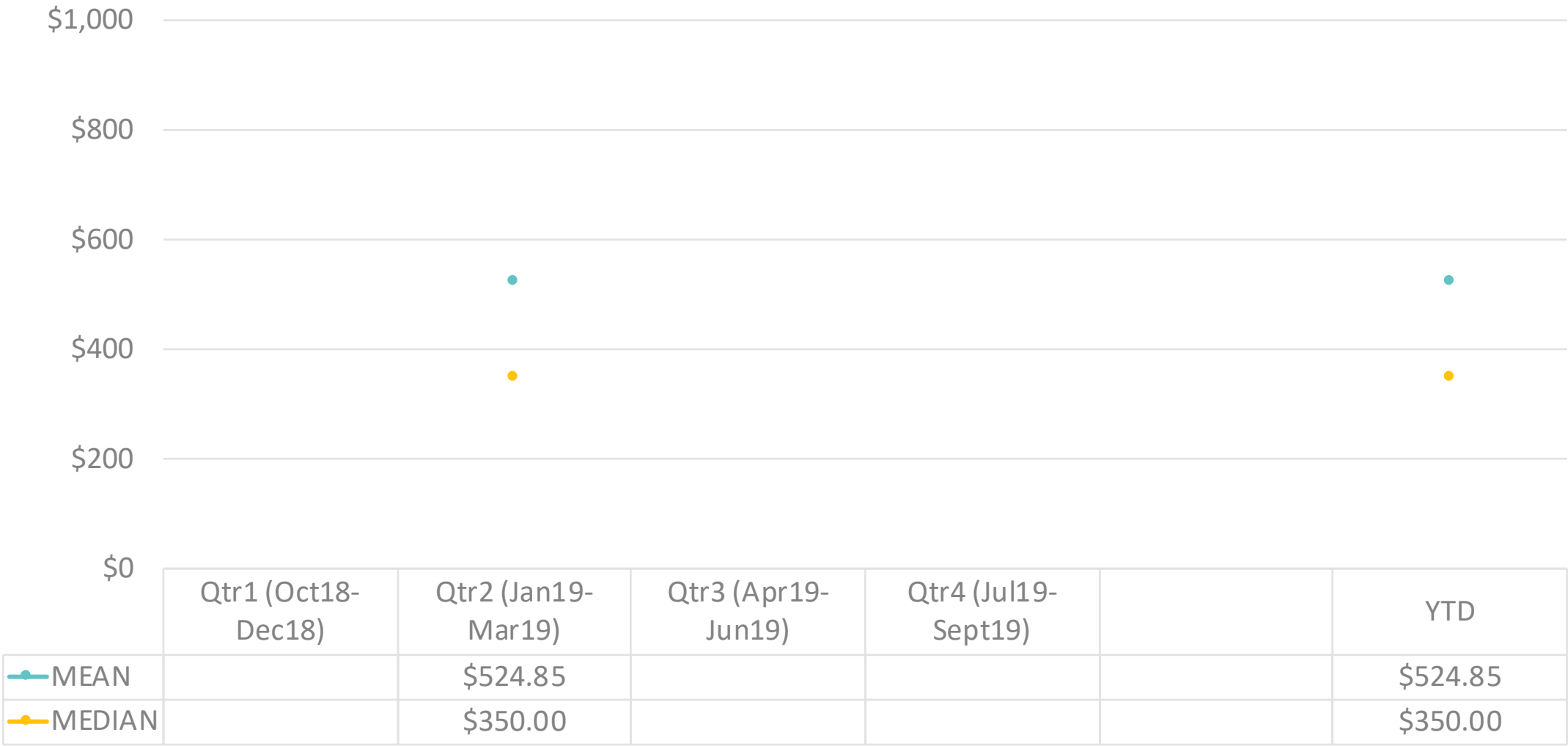
# ONISLE EXPENDITURES

- \$960.59 = overall mean average expense (for entire travel party) by respondent
- \$524.85 = overall mean average **per person** expenditures

# ONISLE – TRAVEL PARTY TRACKING

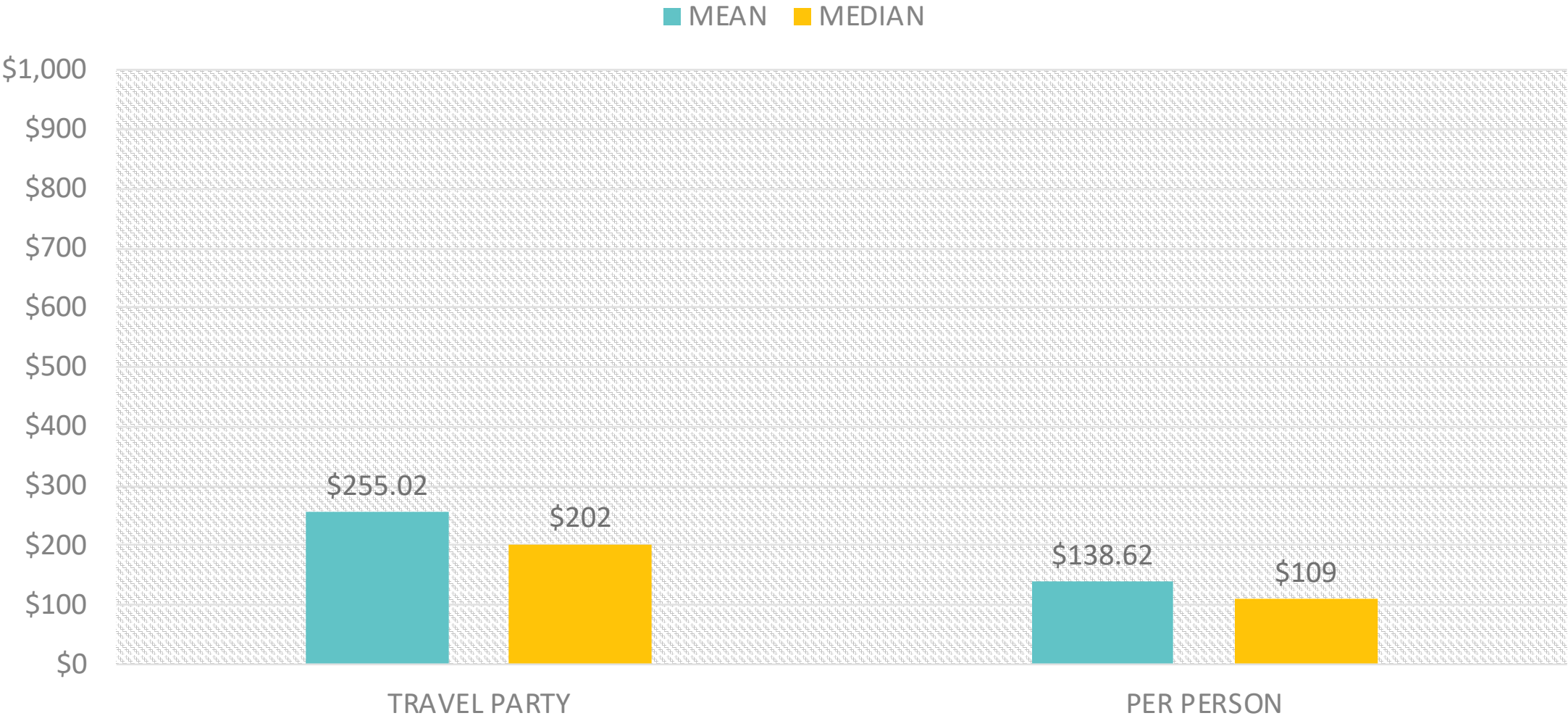


# ONISLE – PER PERSON TRACKING

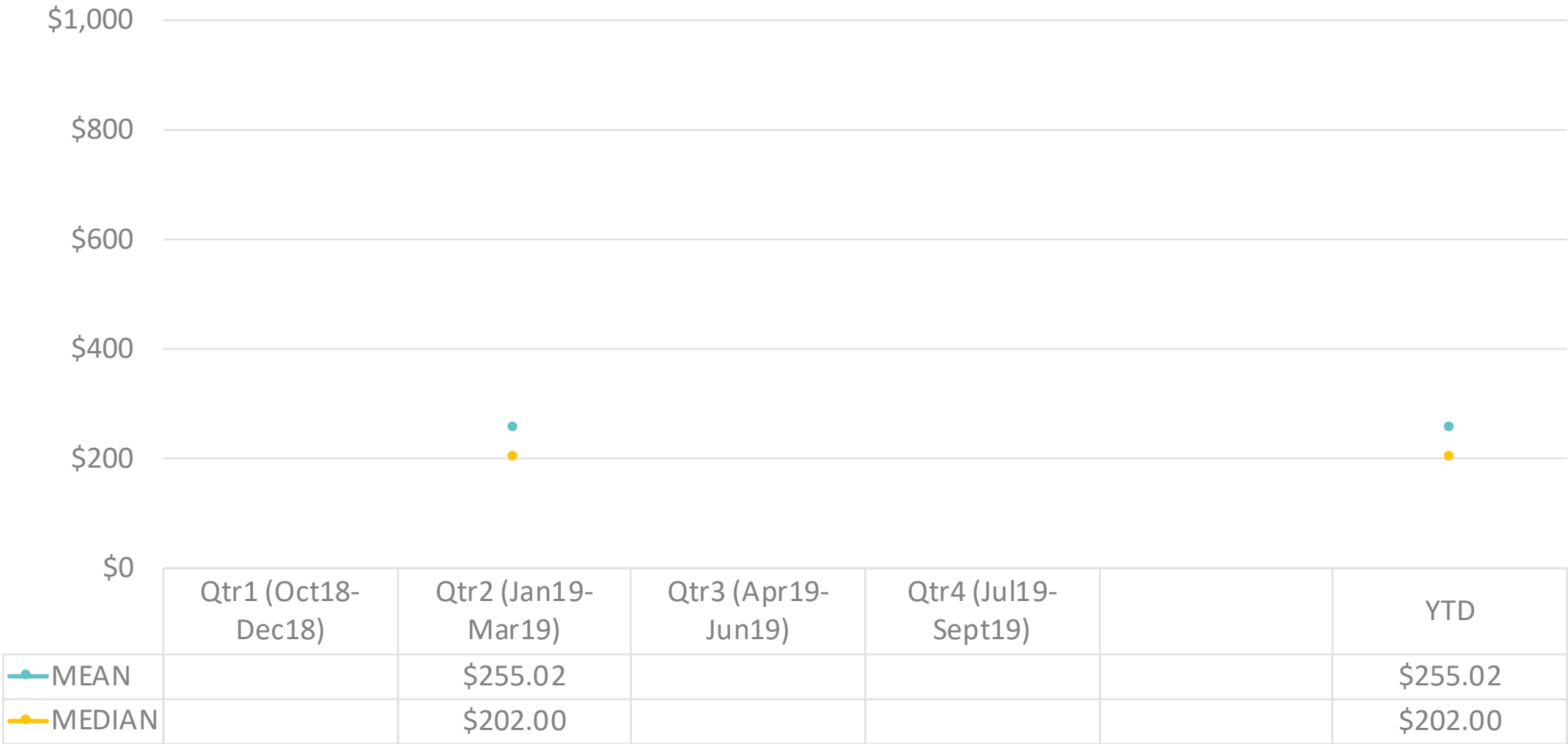




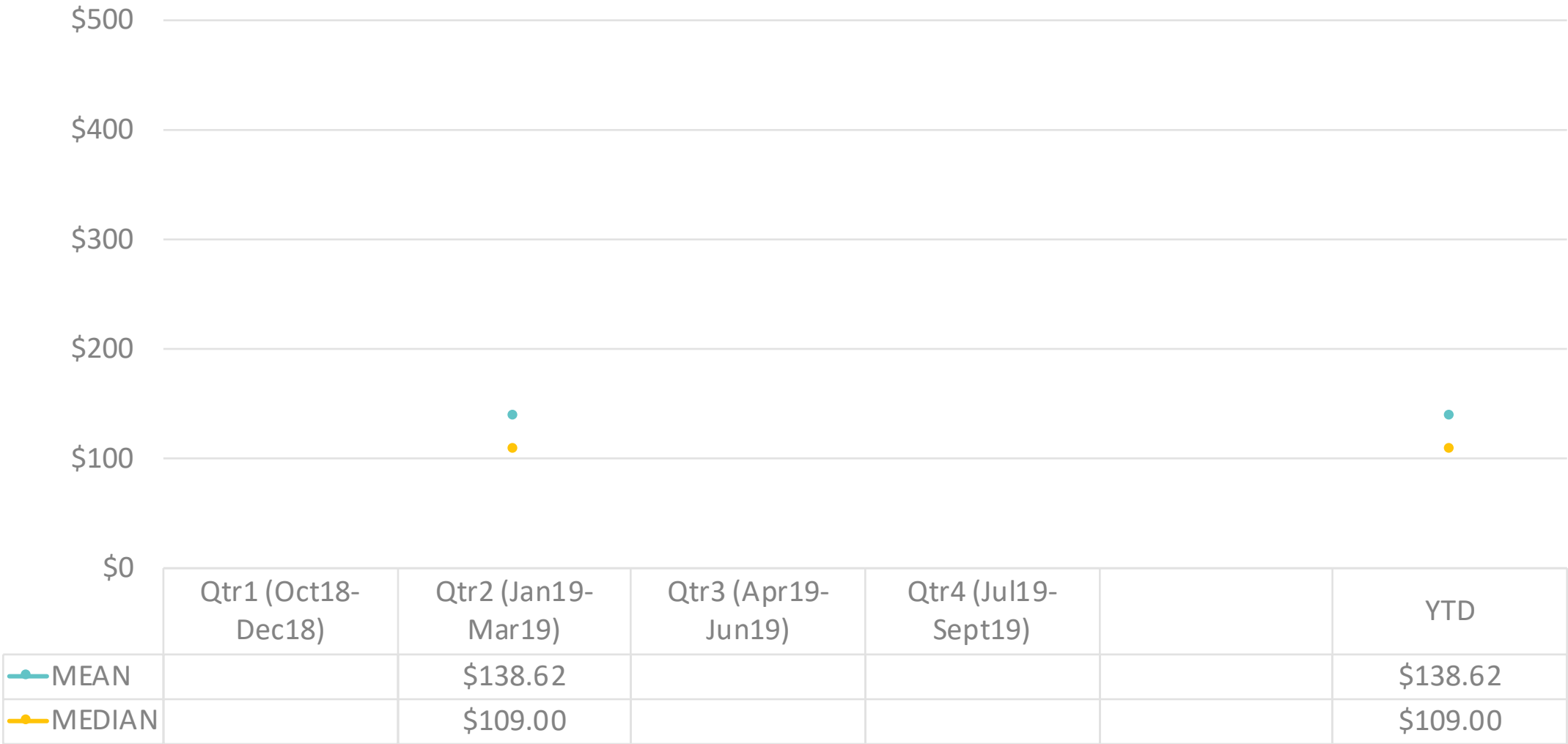
# ONISLE – PER DAY SPENDING



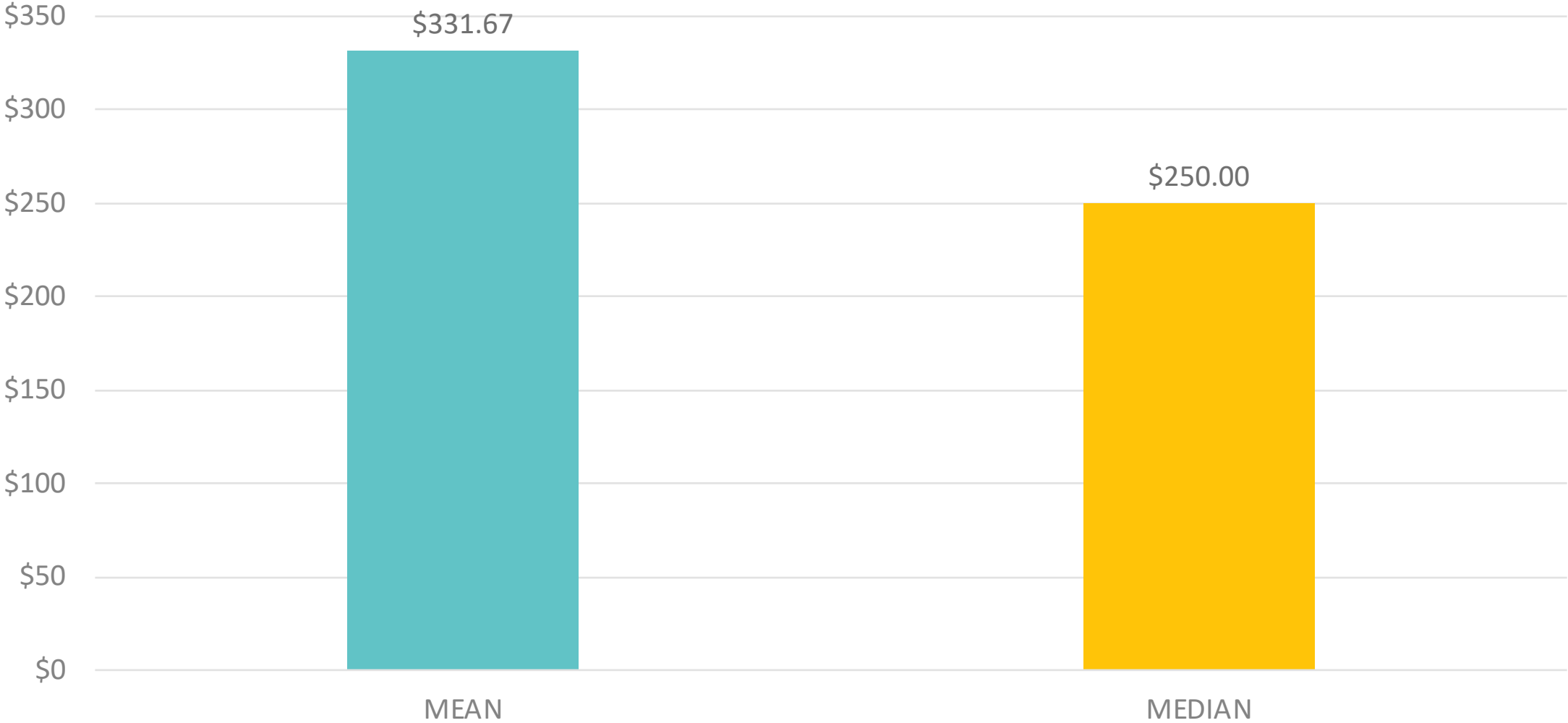
# ONISLE – TRAVEL PARTY/ PER DAY TRACKING



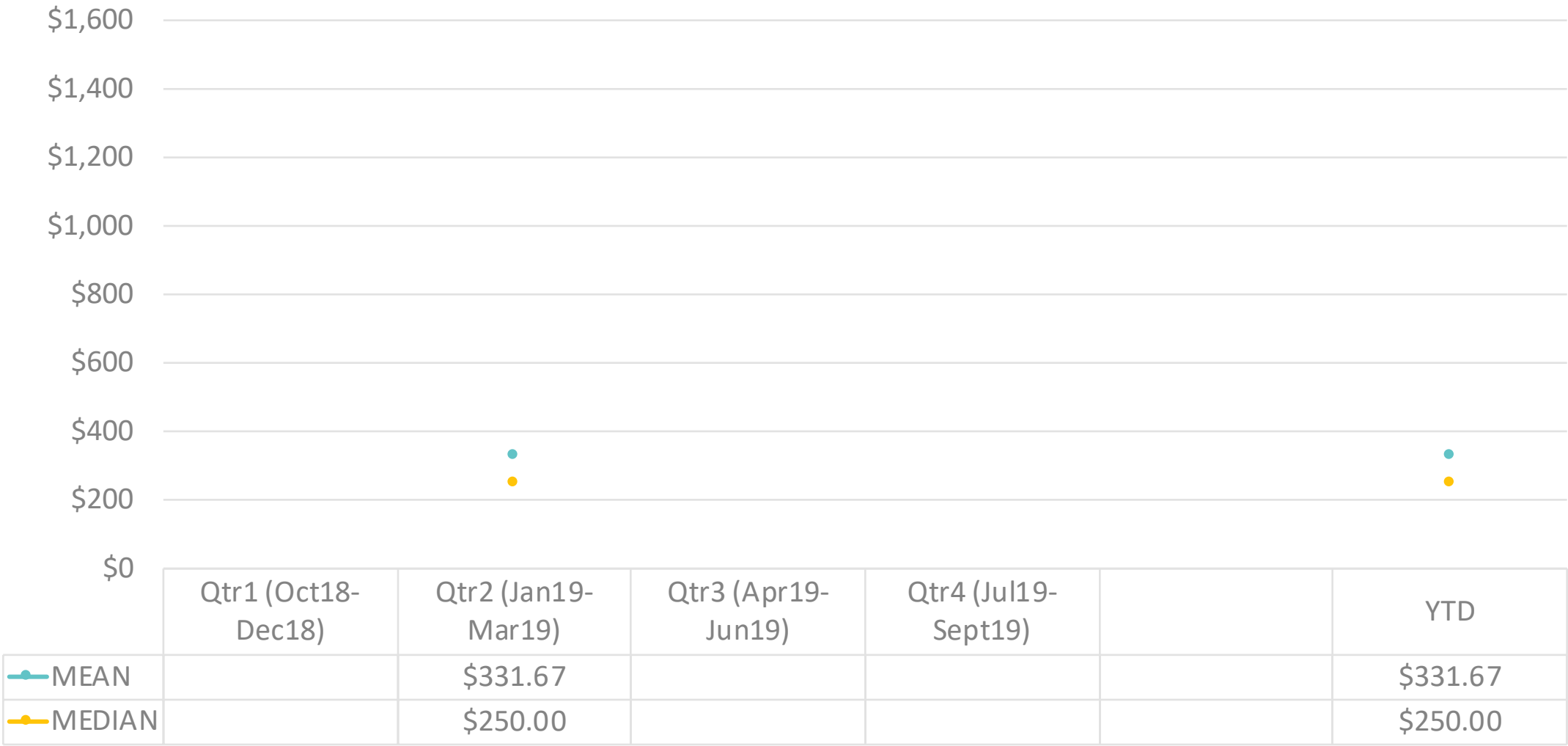
# ONISLE – PER PERSON/ PER DAY TRACKING



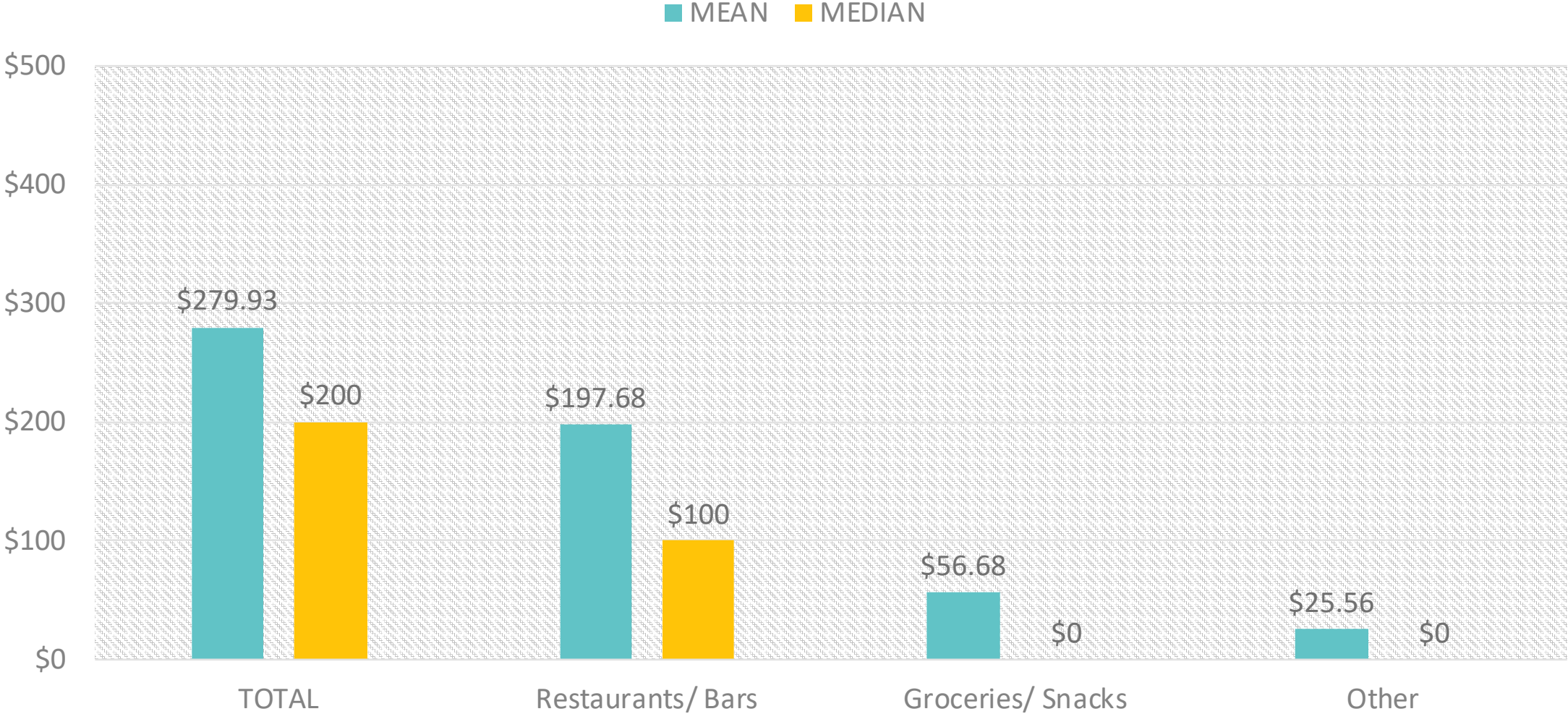
# ONISLE – ACCOMMODATIONS



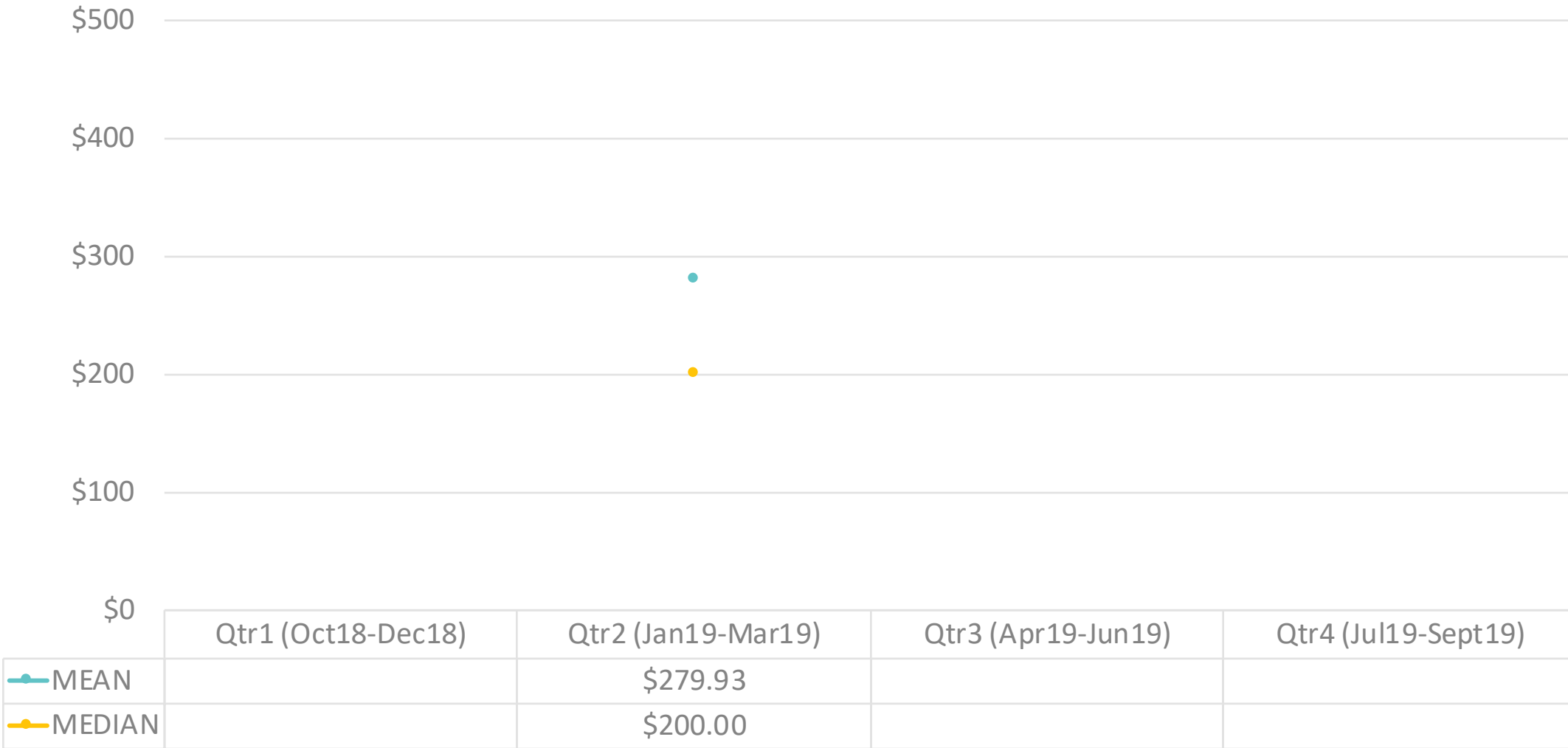
# ONISLE – ACCOMMODATIONS TRACKING



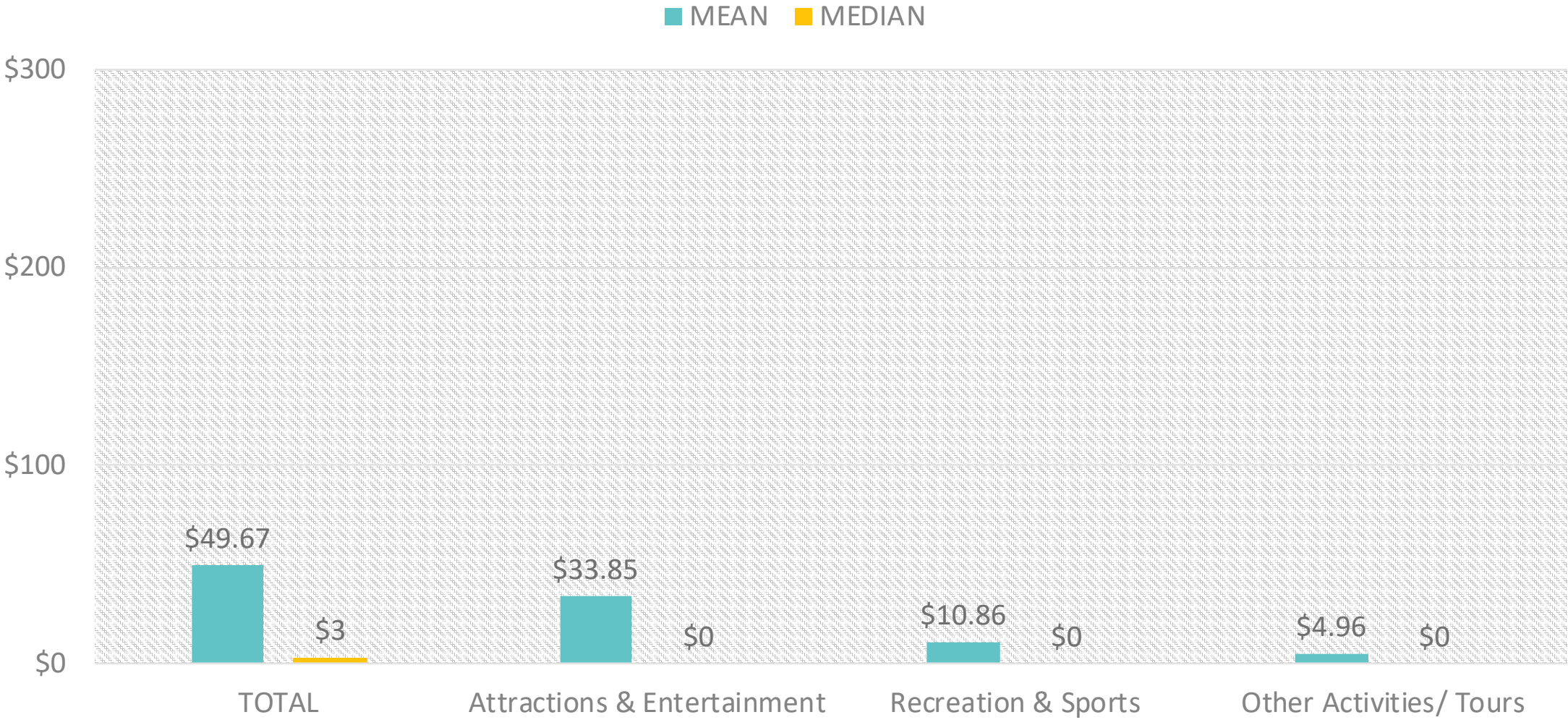
# ONISLE – FOOD & BEVERAGE



# ONISLE – TOTAL FOOD & BEVERAGE TRACKING



# ONISLE – ENTERTAINMENT & RECREATION

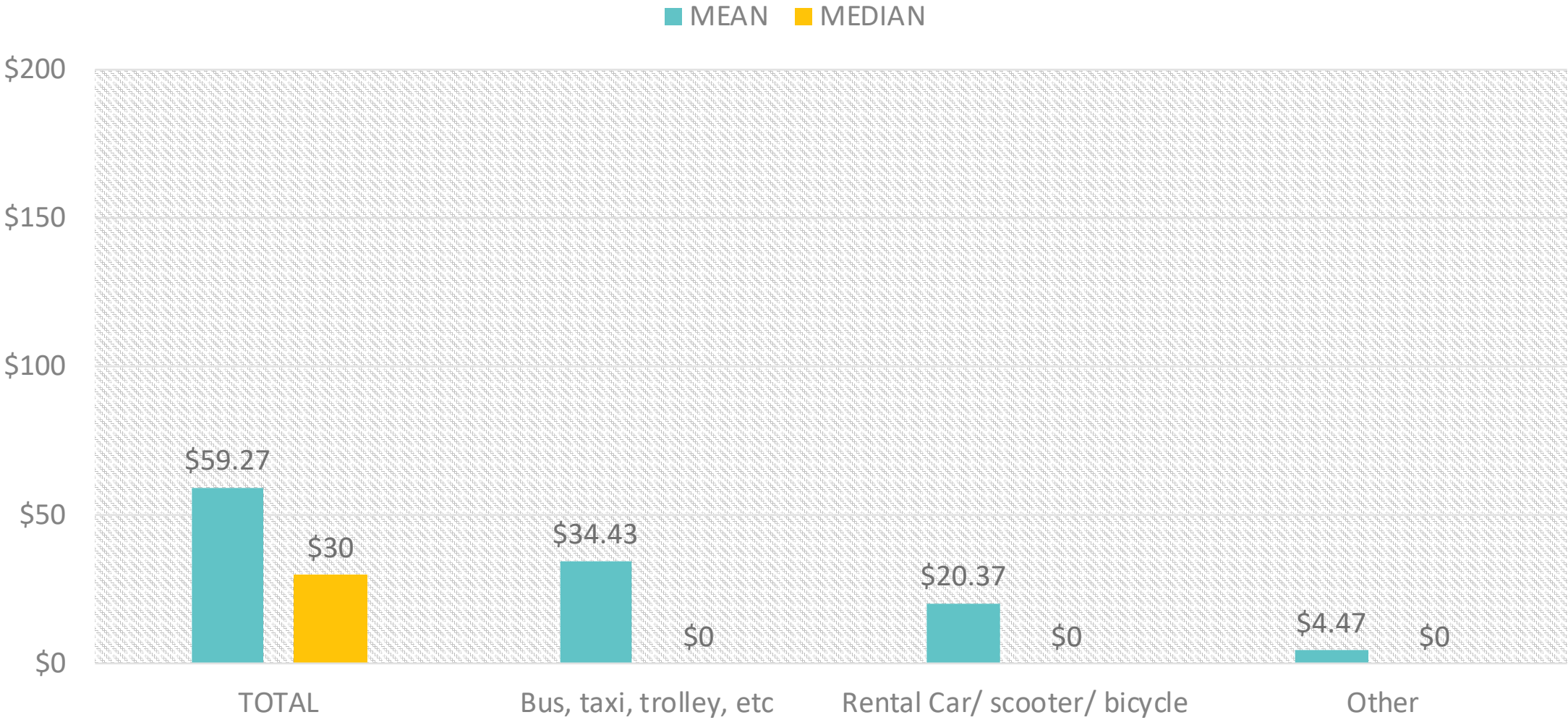




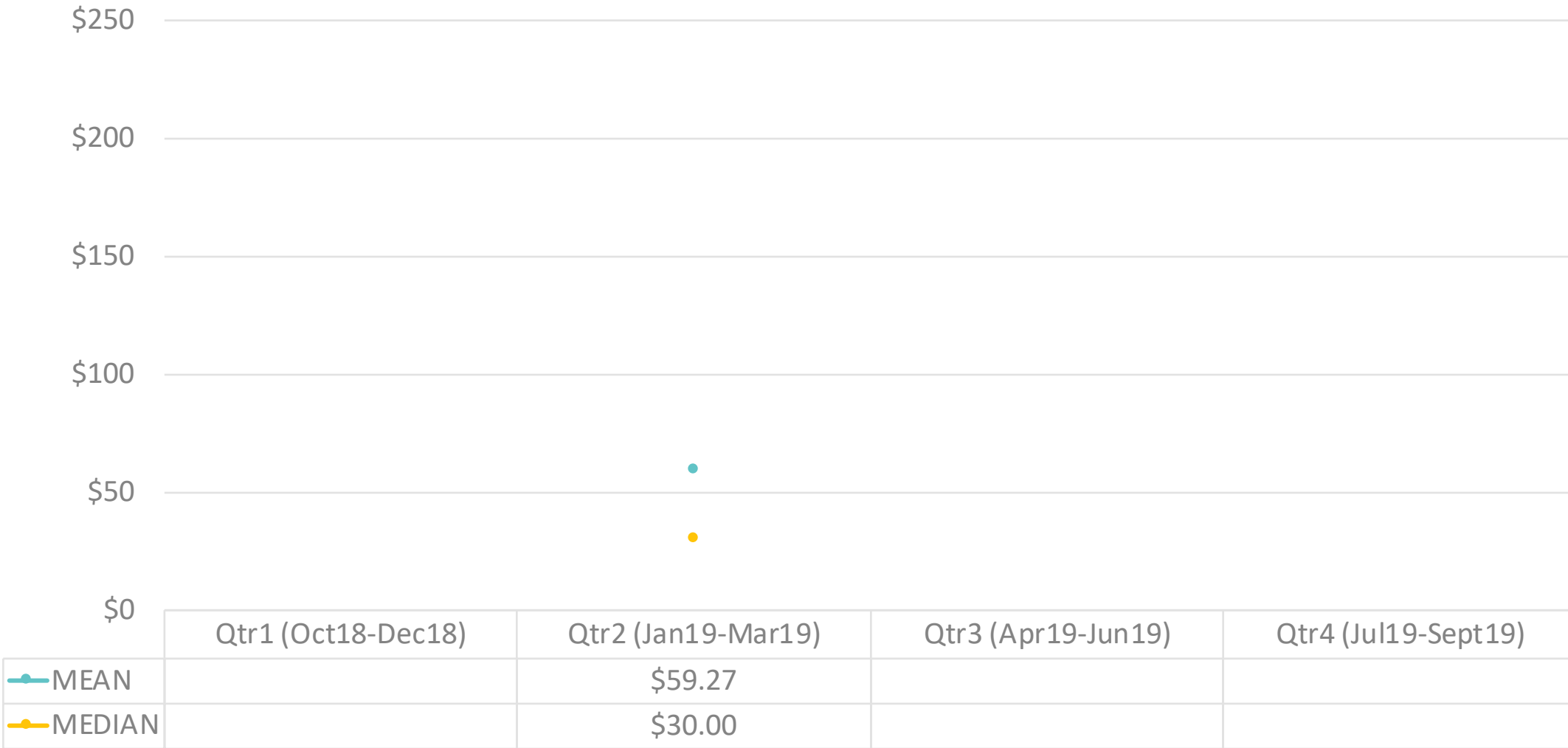
# ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING



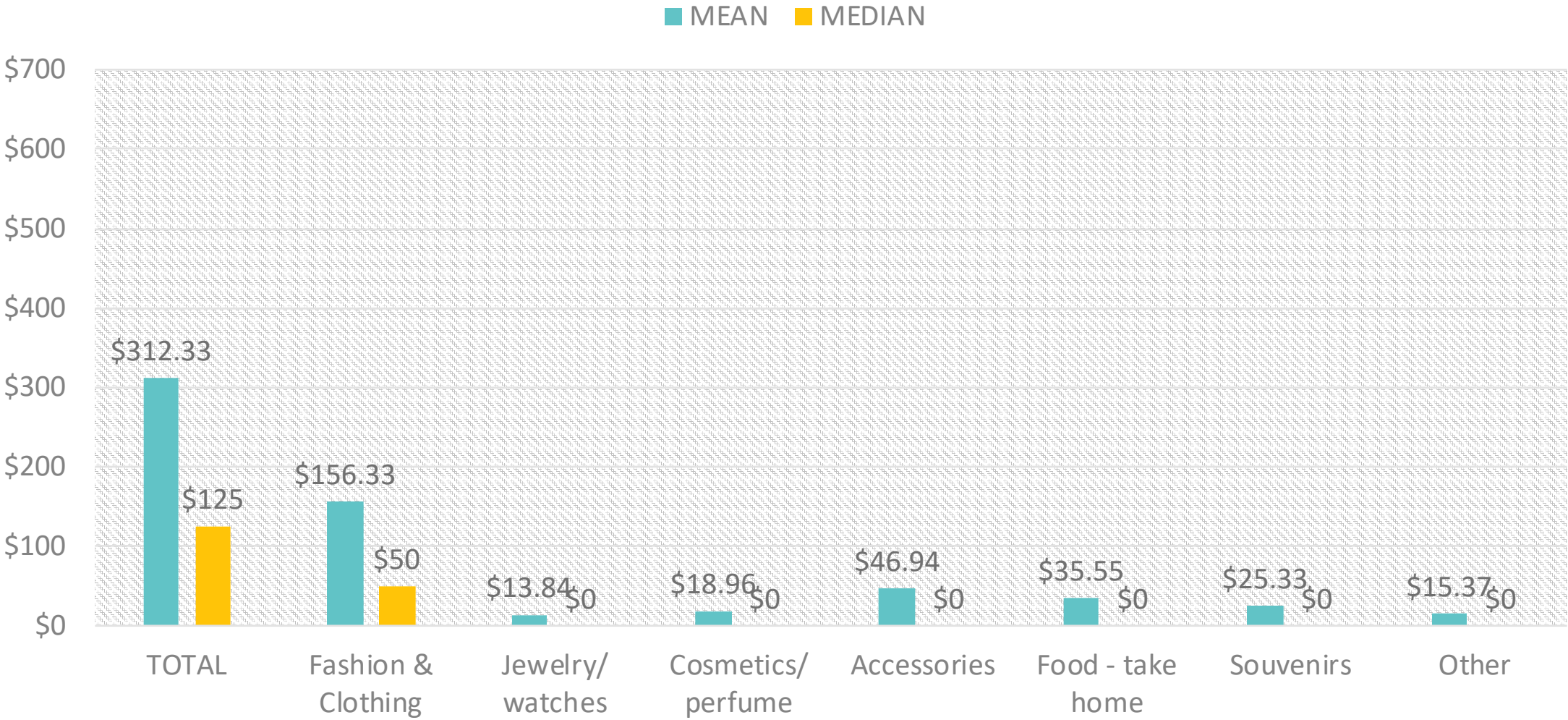
# ONISLE – TRANSPORTATION



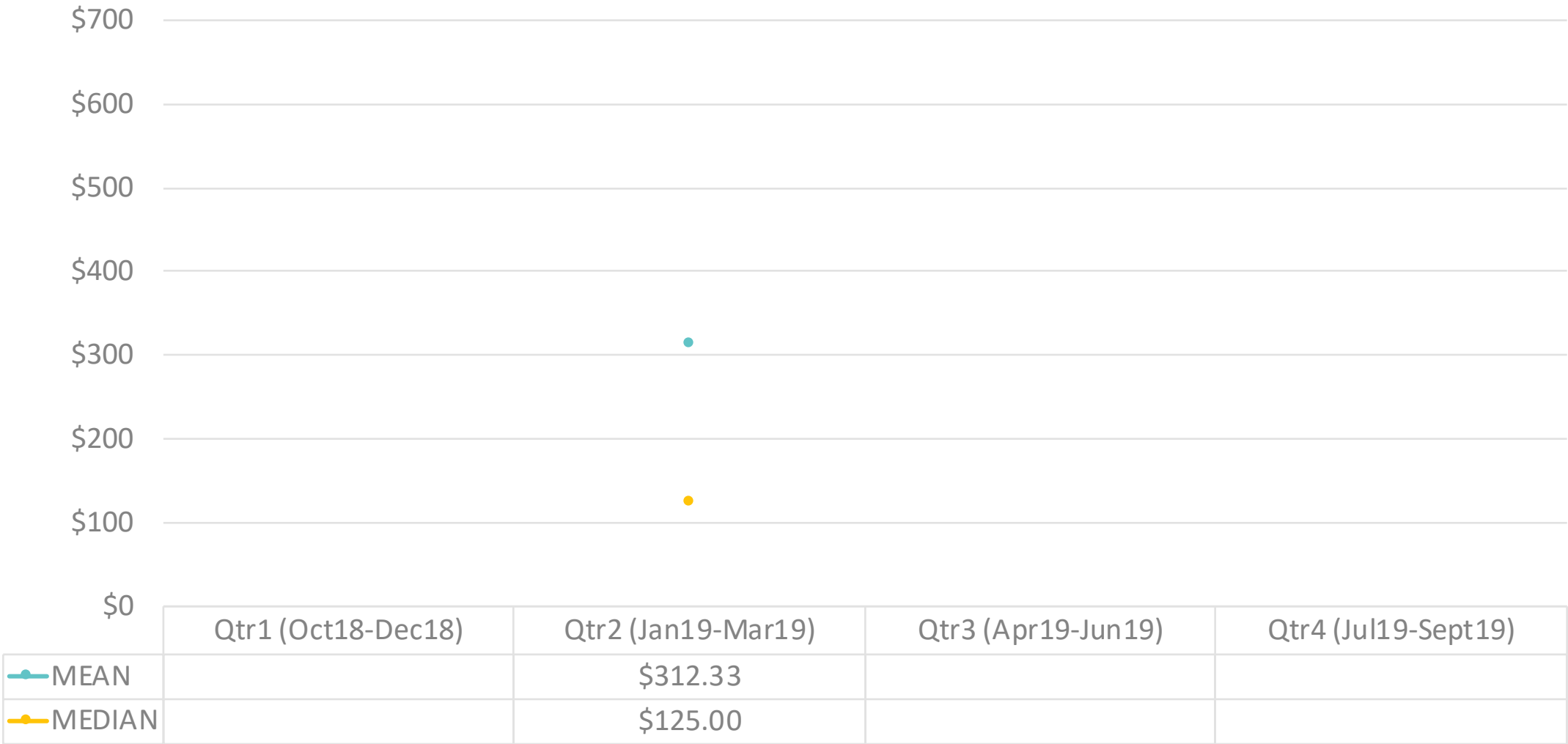
# ONISLE – TOTAL TRANSPORTATION TRACKING



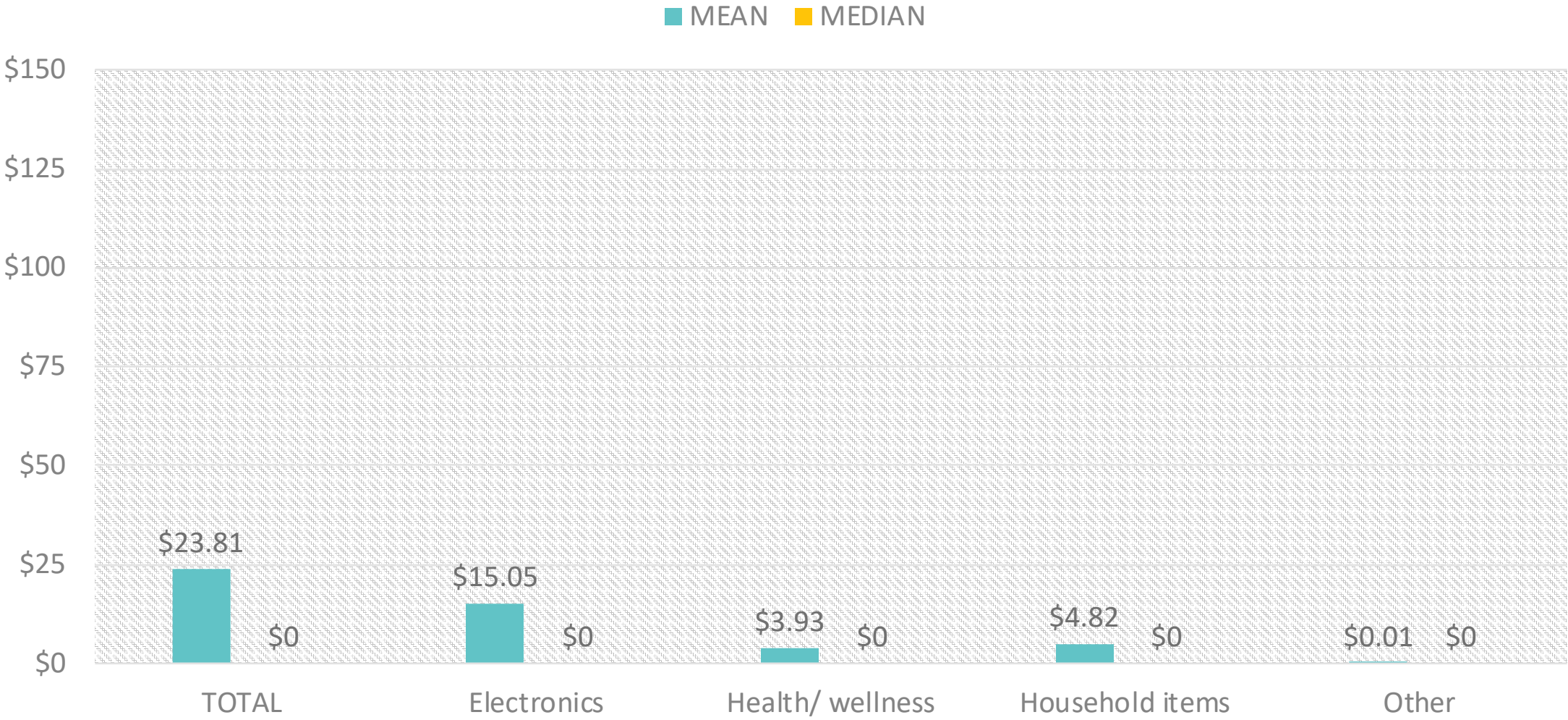
# ONISLE – SHOPPING



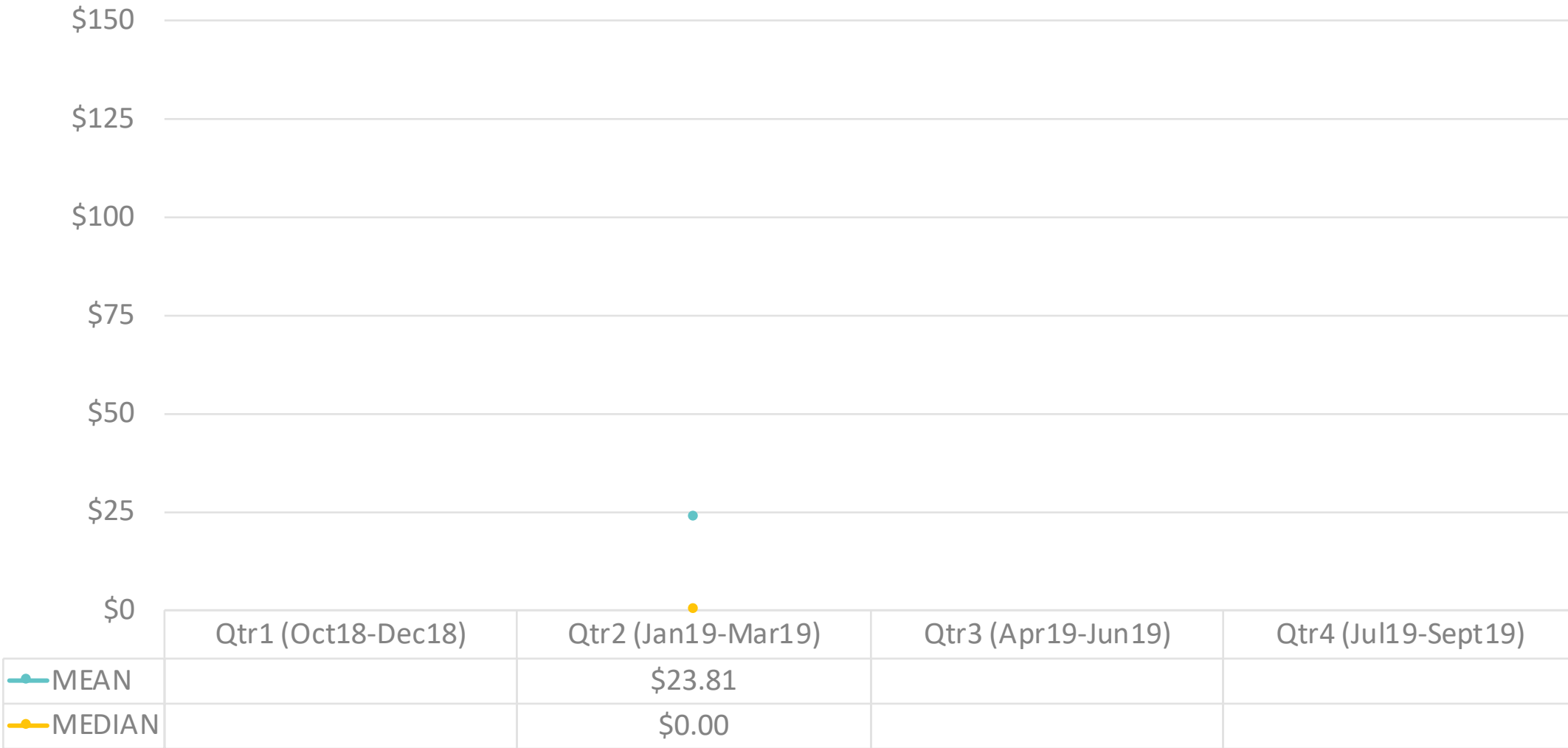
# ONISLE – TOTAL SHOPPING TRACKING



# ONISLE – MISCELLANEOUS



# ONISLE – MISCELLANEOUS TRACKING

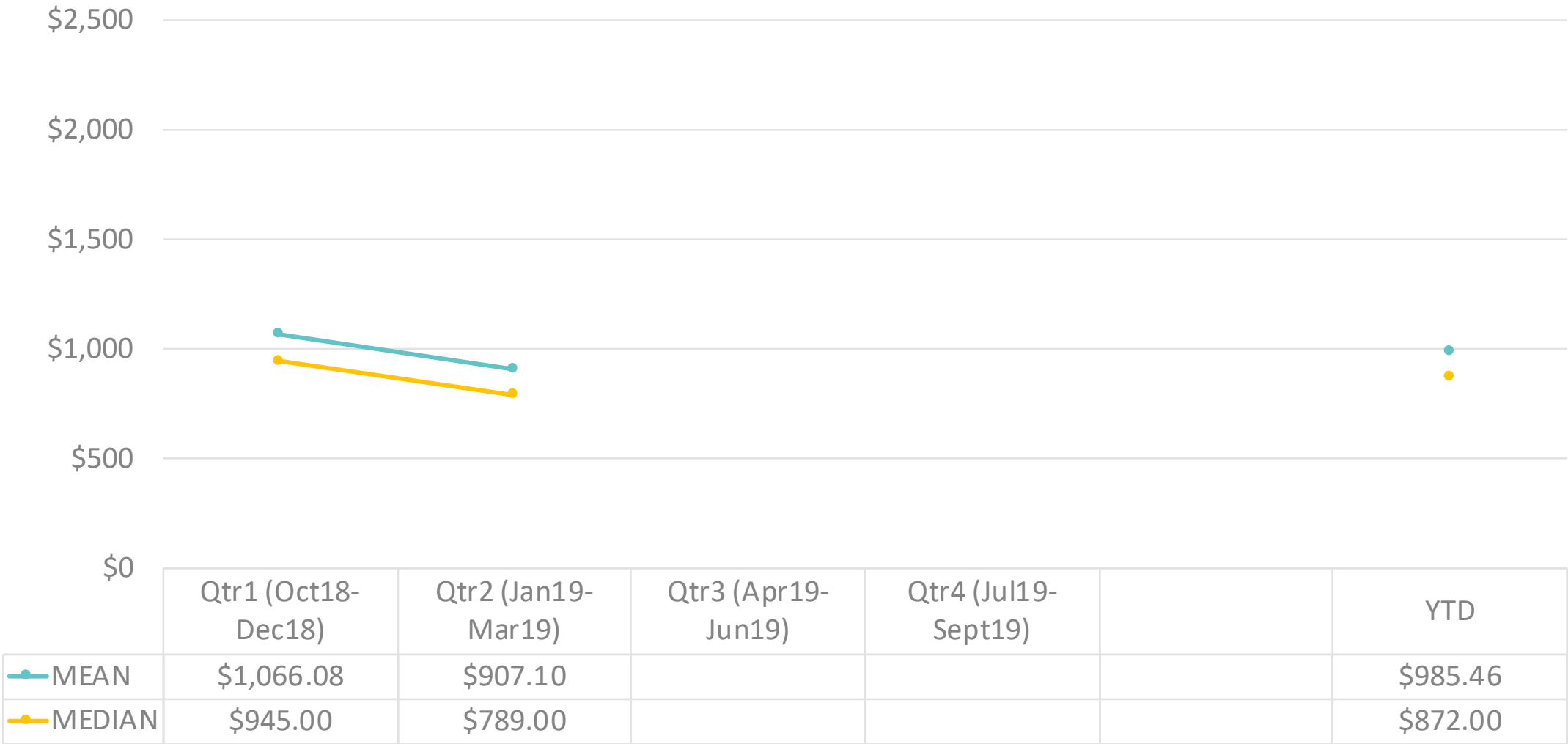


# TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

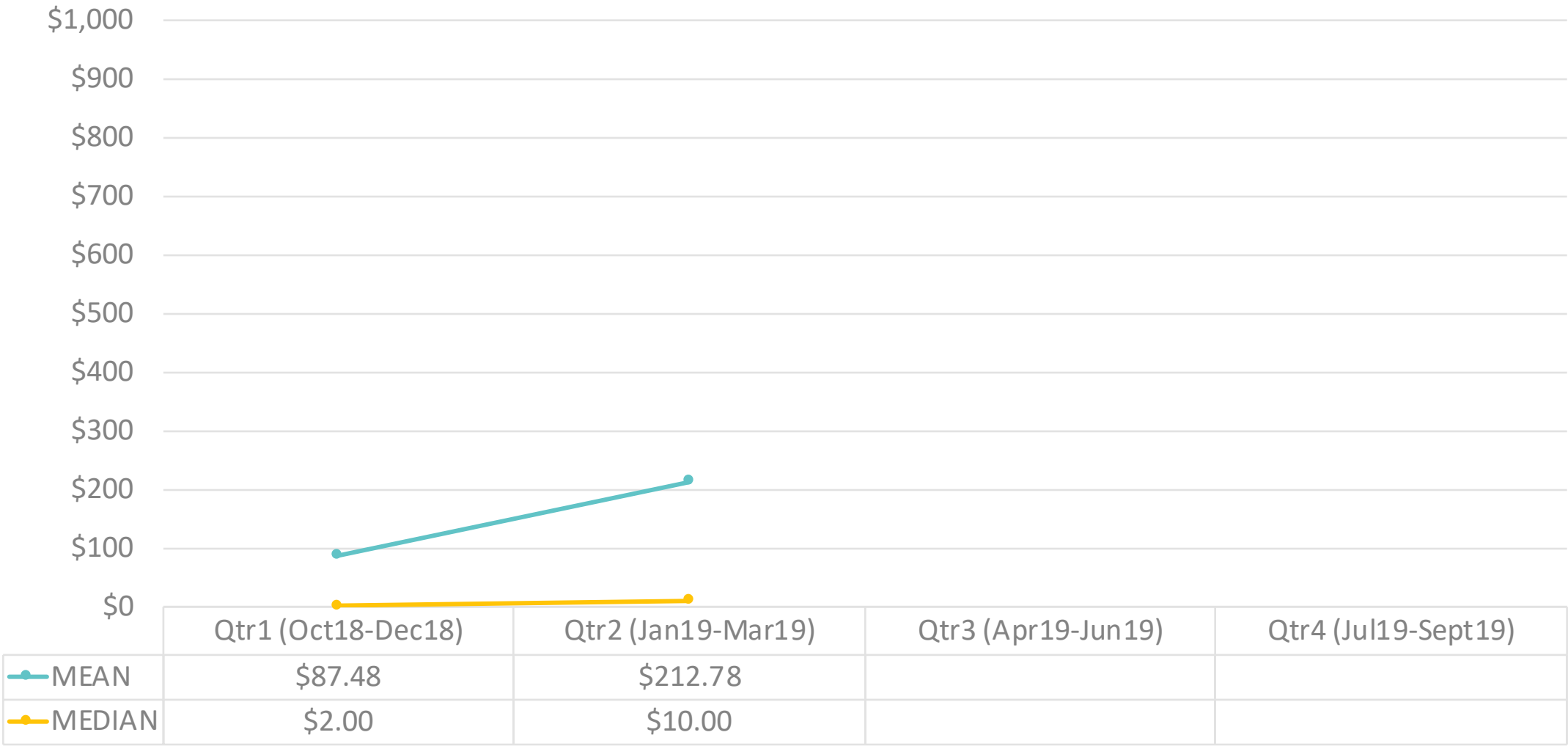
- \$907.10 = Mean average per person
- \$789.00 = Median amount spent per person



# TOTAL EXPENDITURES PER PERSON TRACKING



# GUAM AIRPORT EXPENDITURE TRACKING



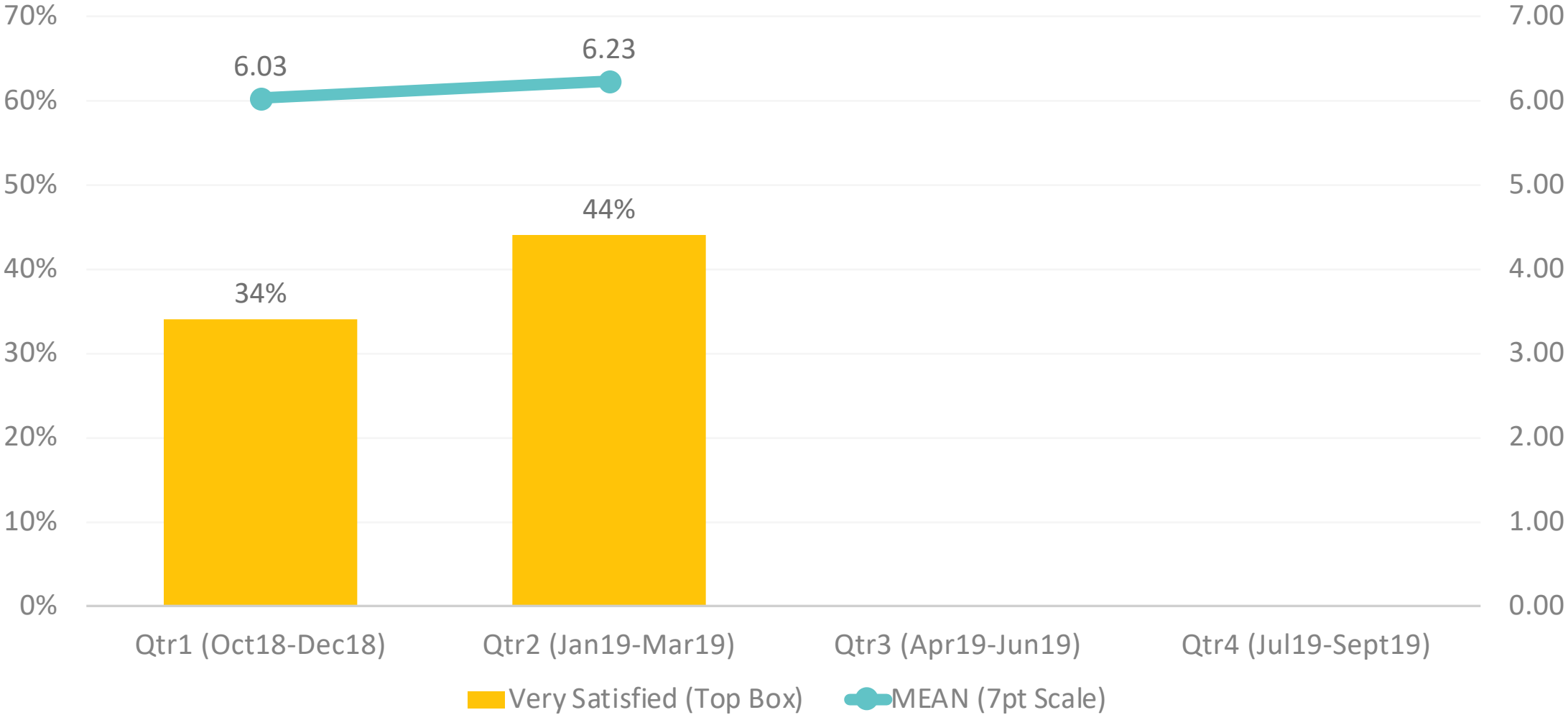


SECTION 4

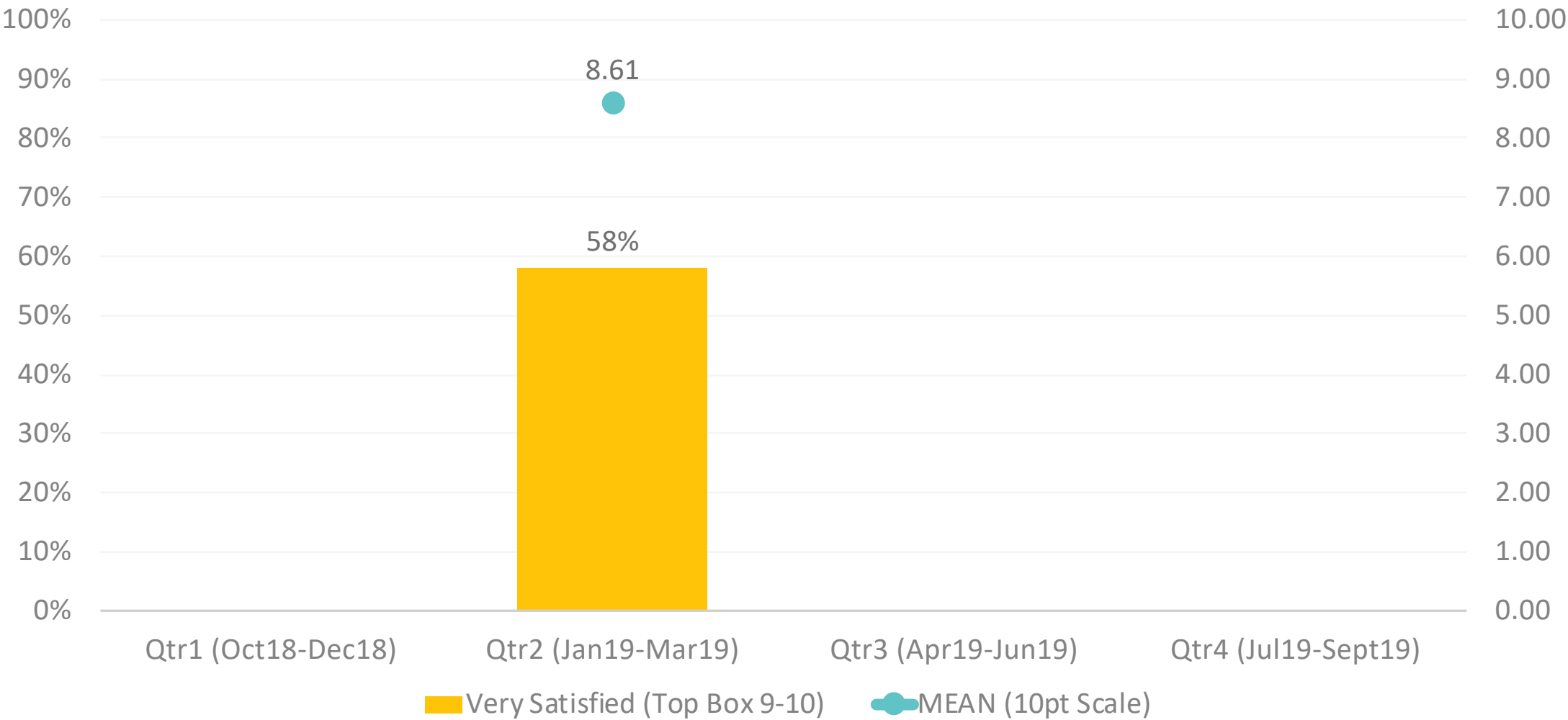
# VISITOR SATISFACTION



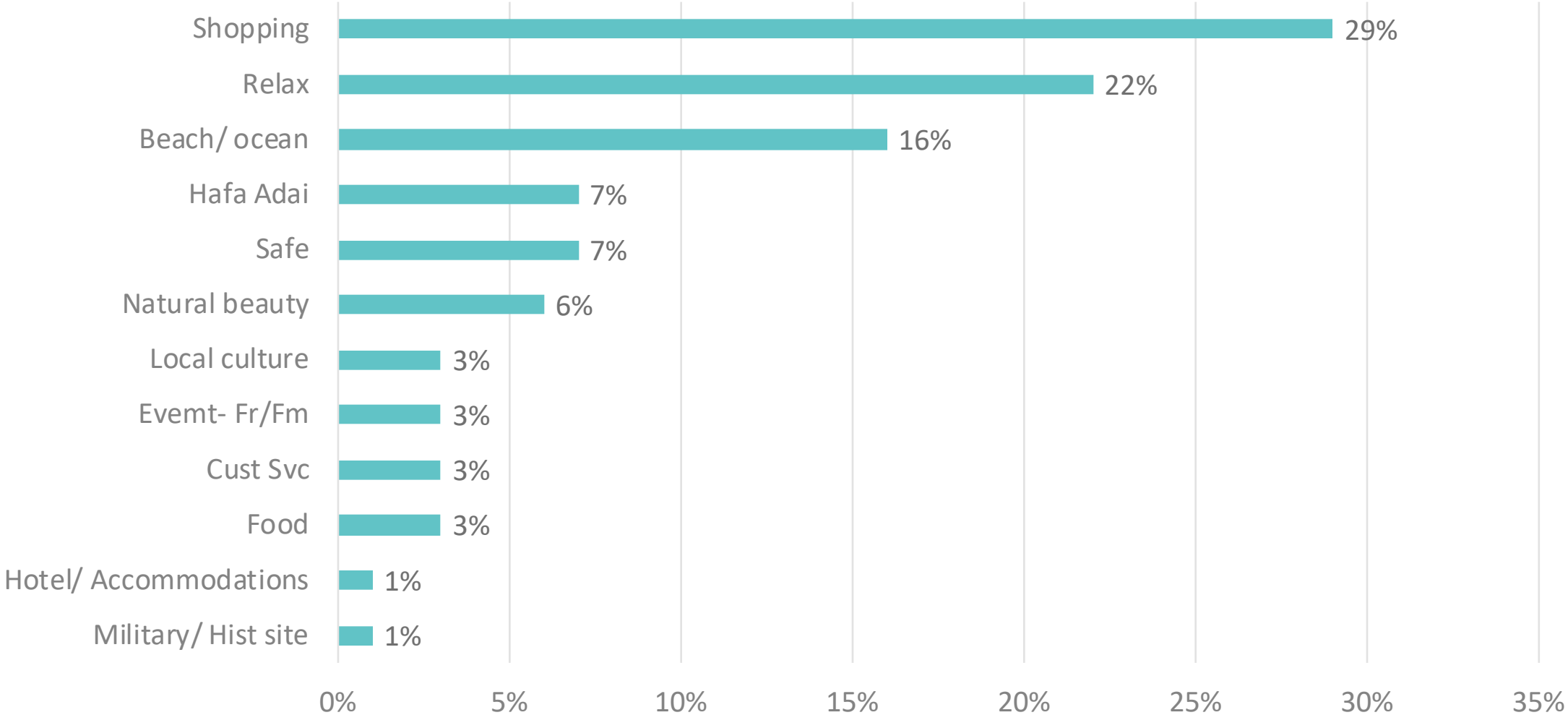
# OVERALL SATISFACTION – 7PT SCALE



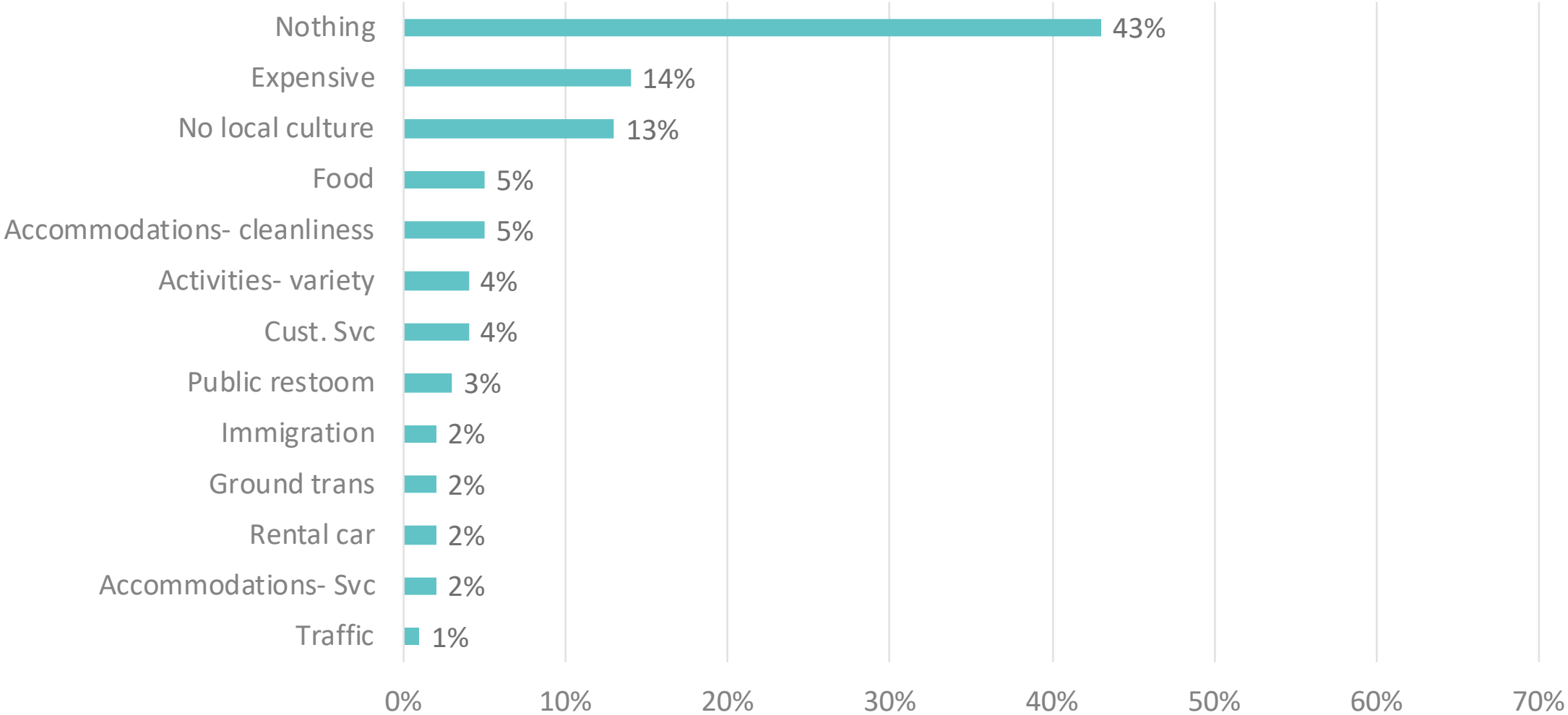
# OVERALL SATISFACTION – 10PT SCALE



# SWOT – POSITIVE ASPECT OF TRIP

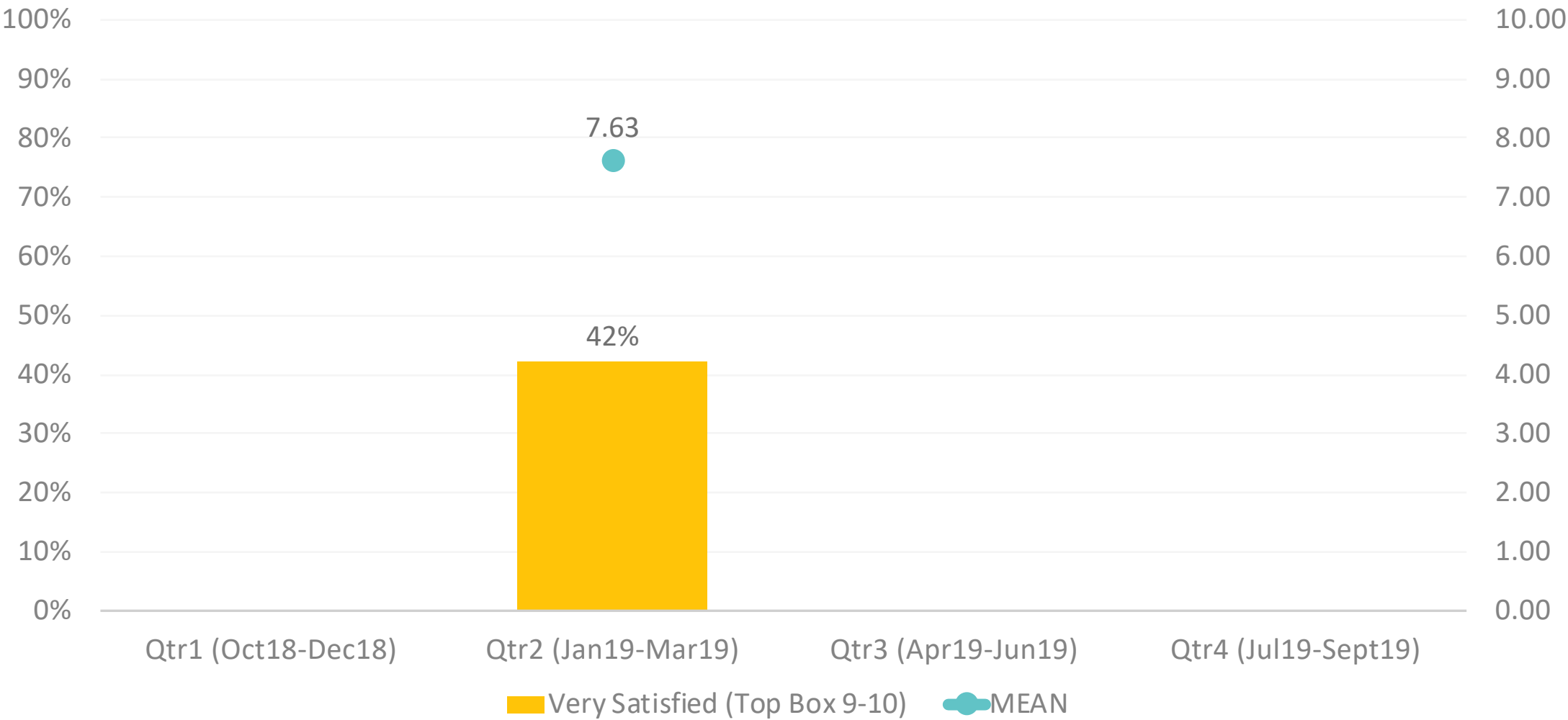


# SWOT – NEGATIVE ASPECT OF TRIP



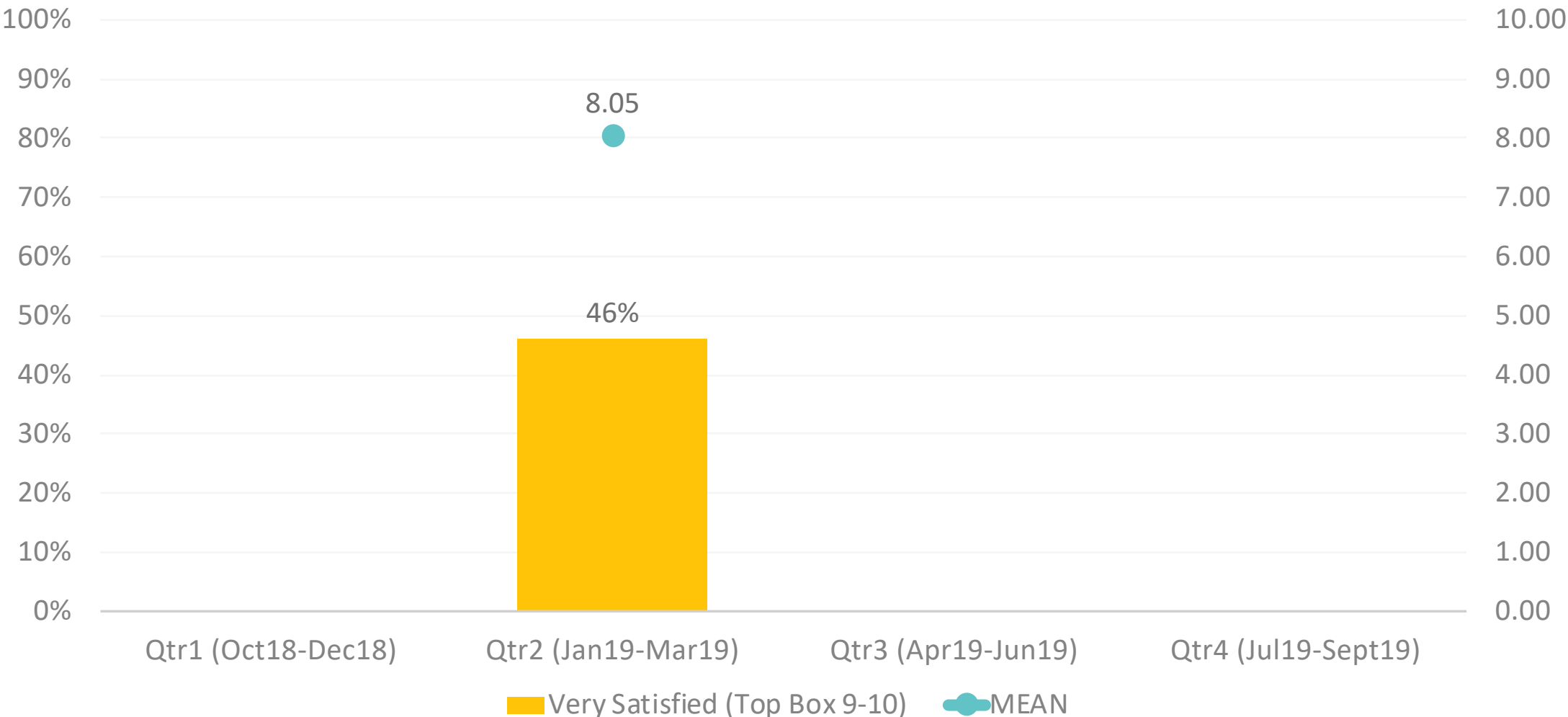


# SATISFACTION – ENTERTAINMENT

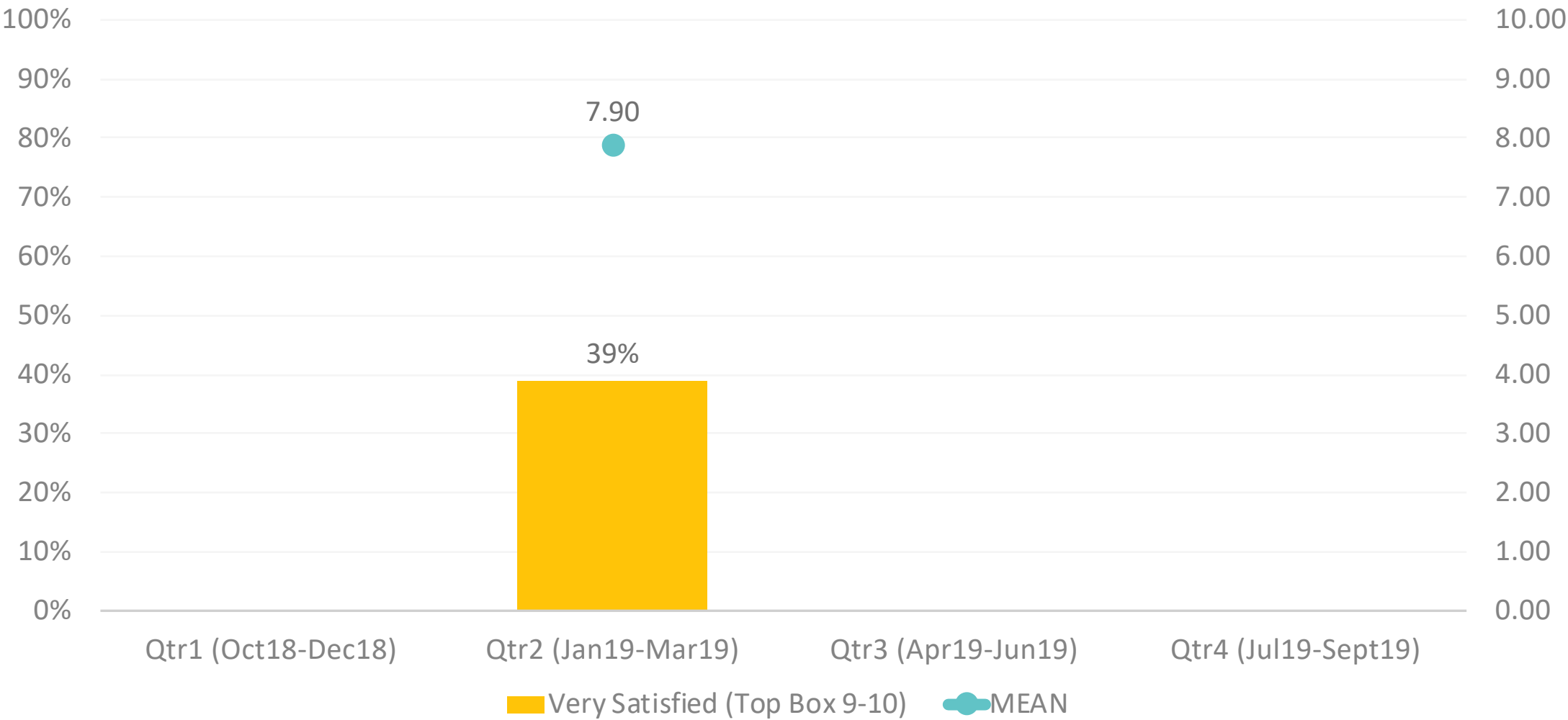




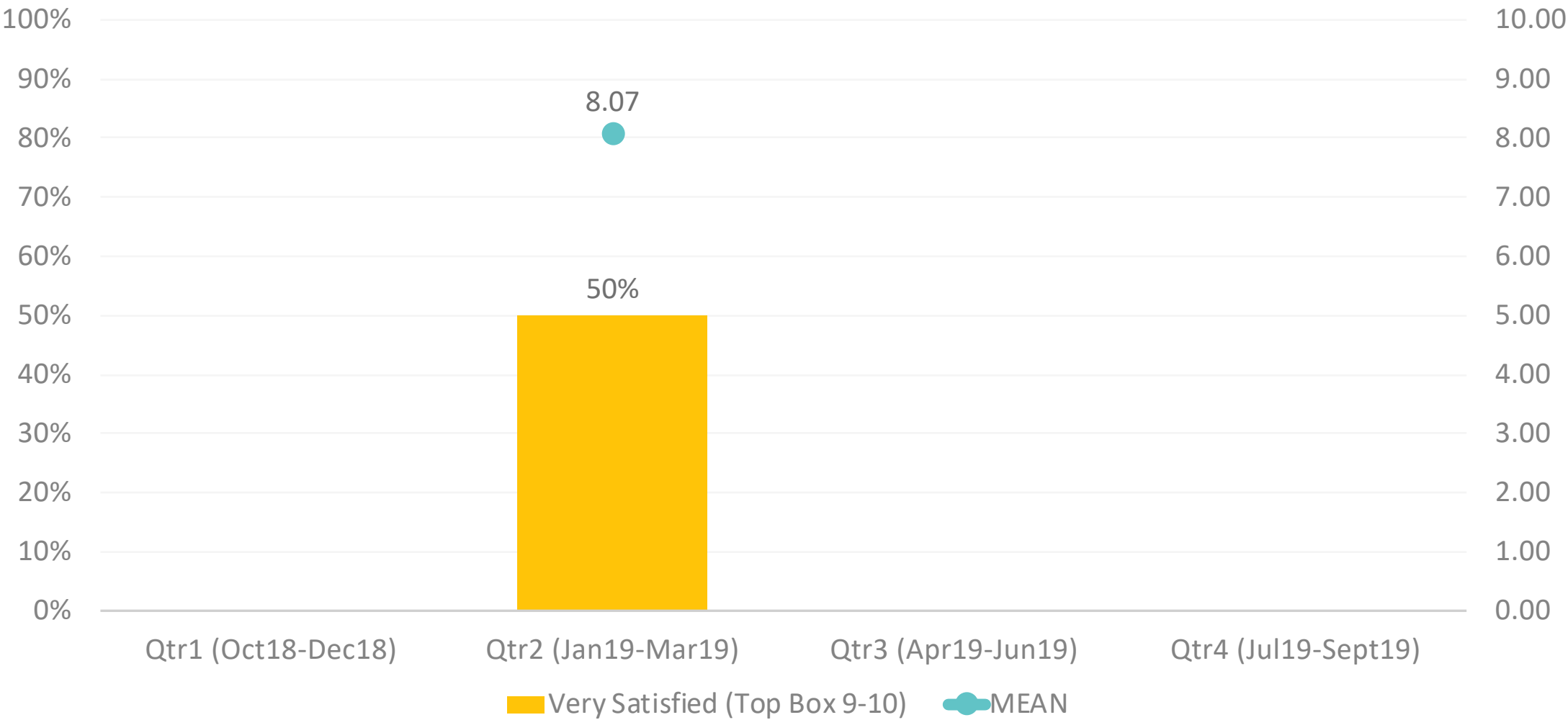
# SATISFACTION – SHOPPING



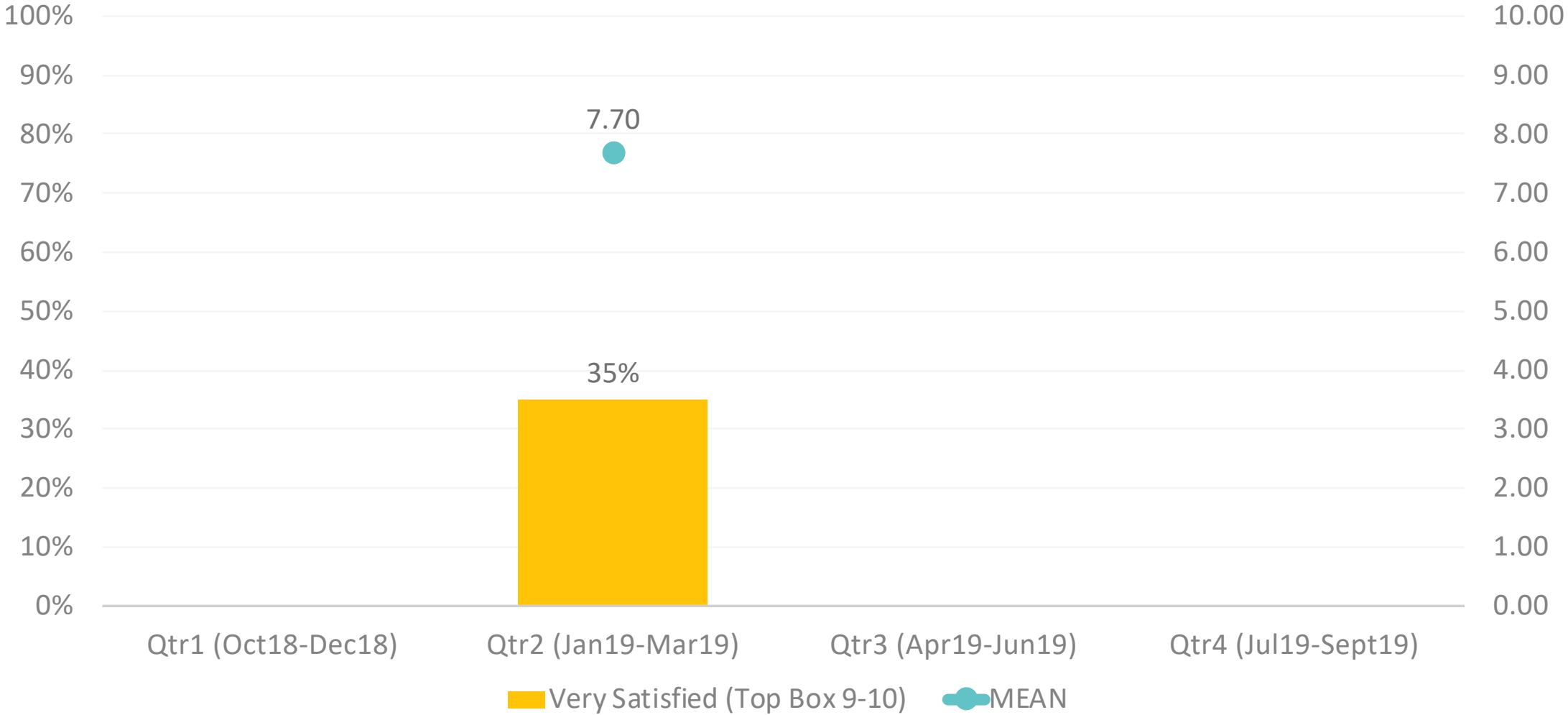
# SATISFACTION – DINING



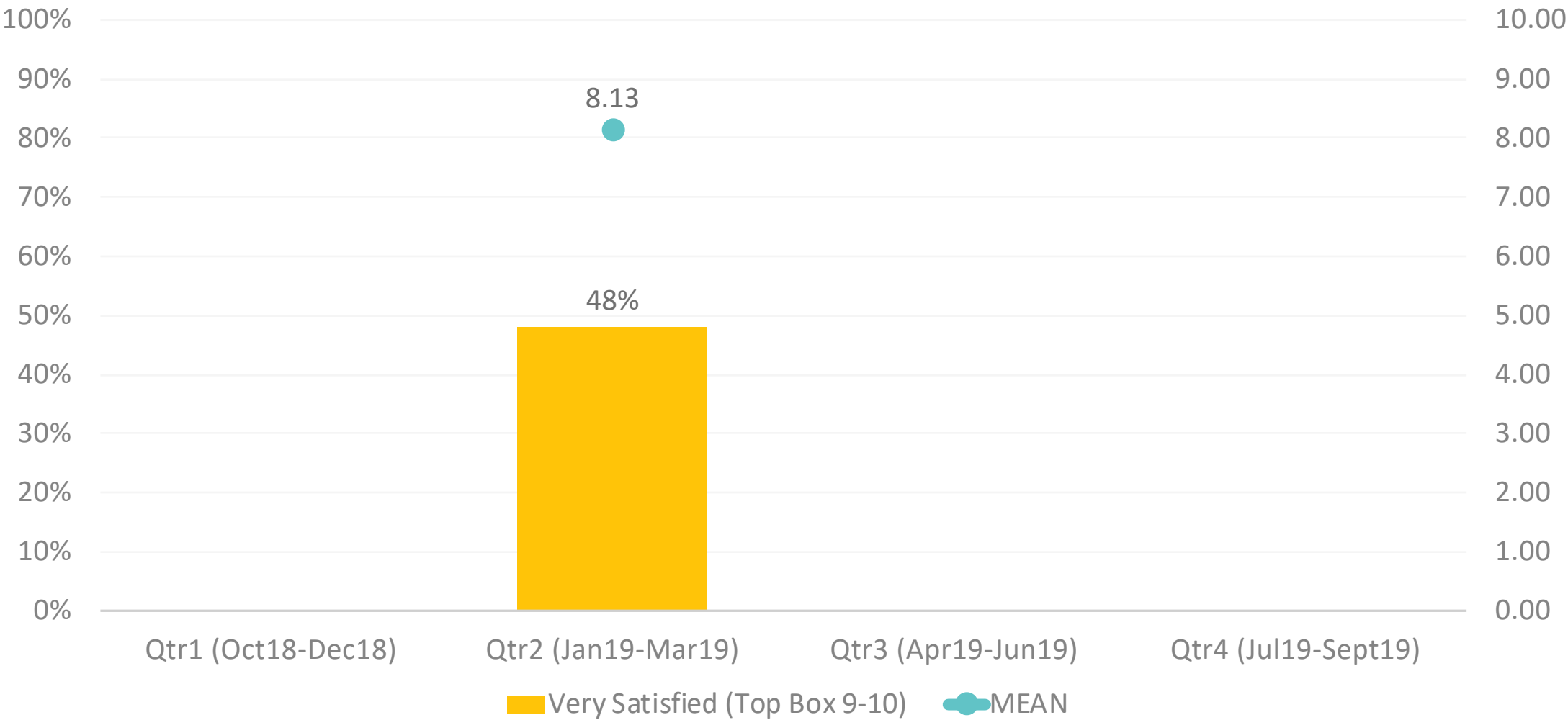
# SATISFACTION – BEACHES



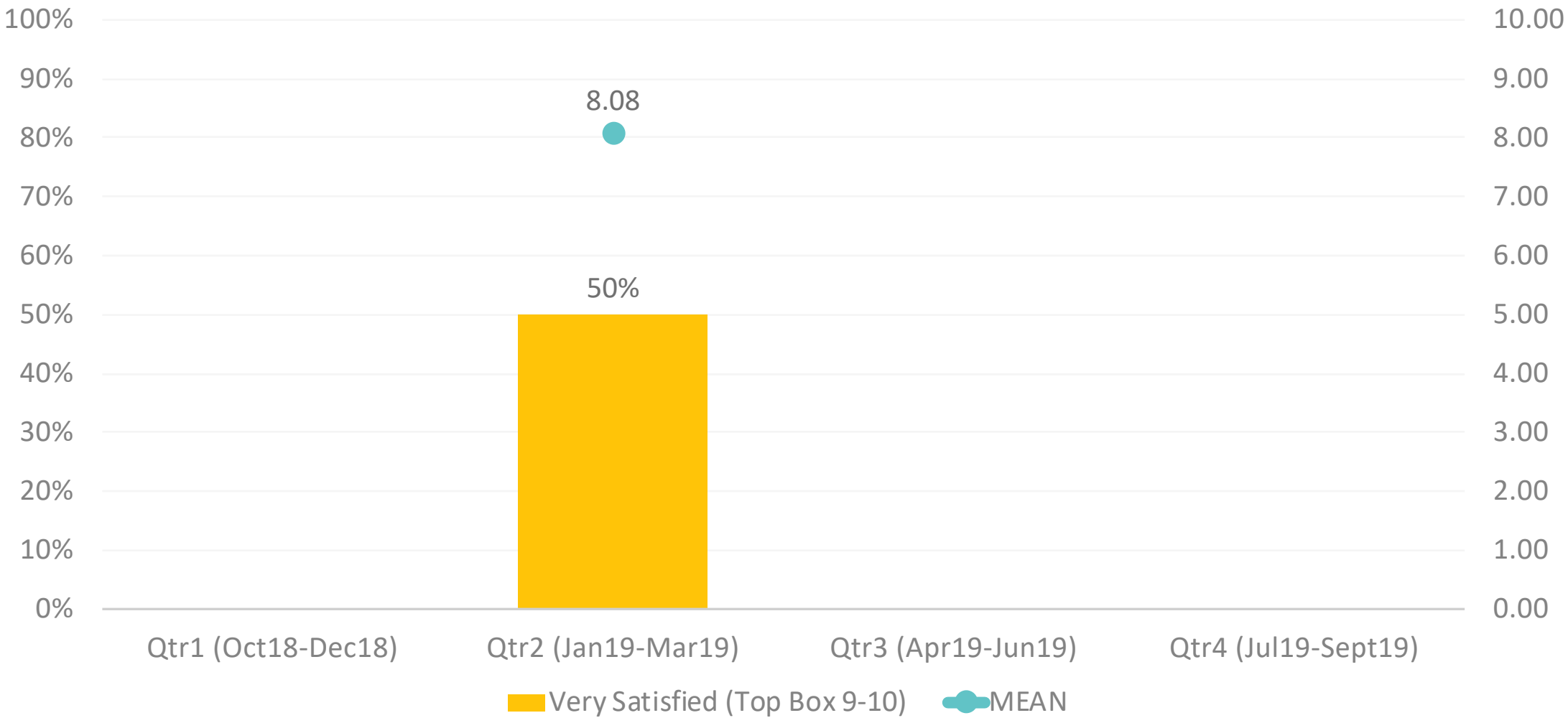
# SATISFACTION – PARKS



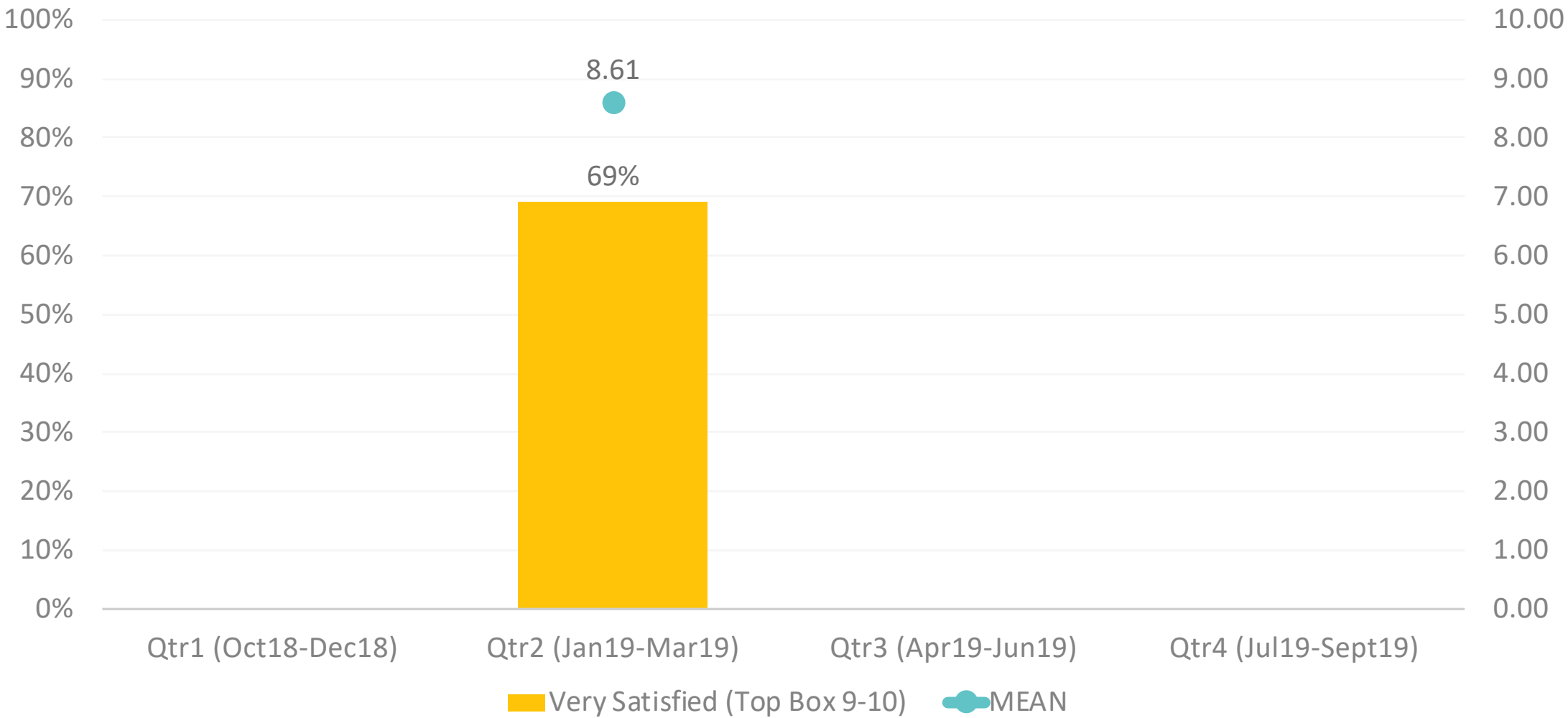
# SATISFACTION – ROADS



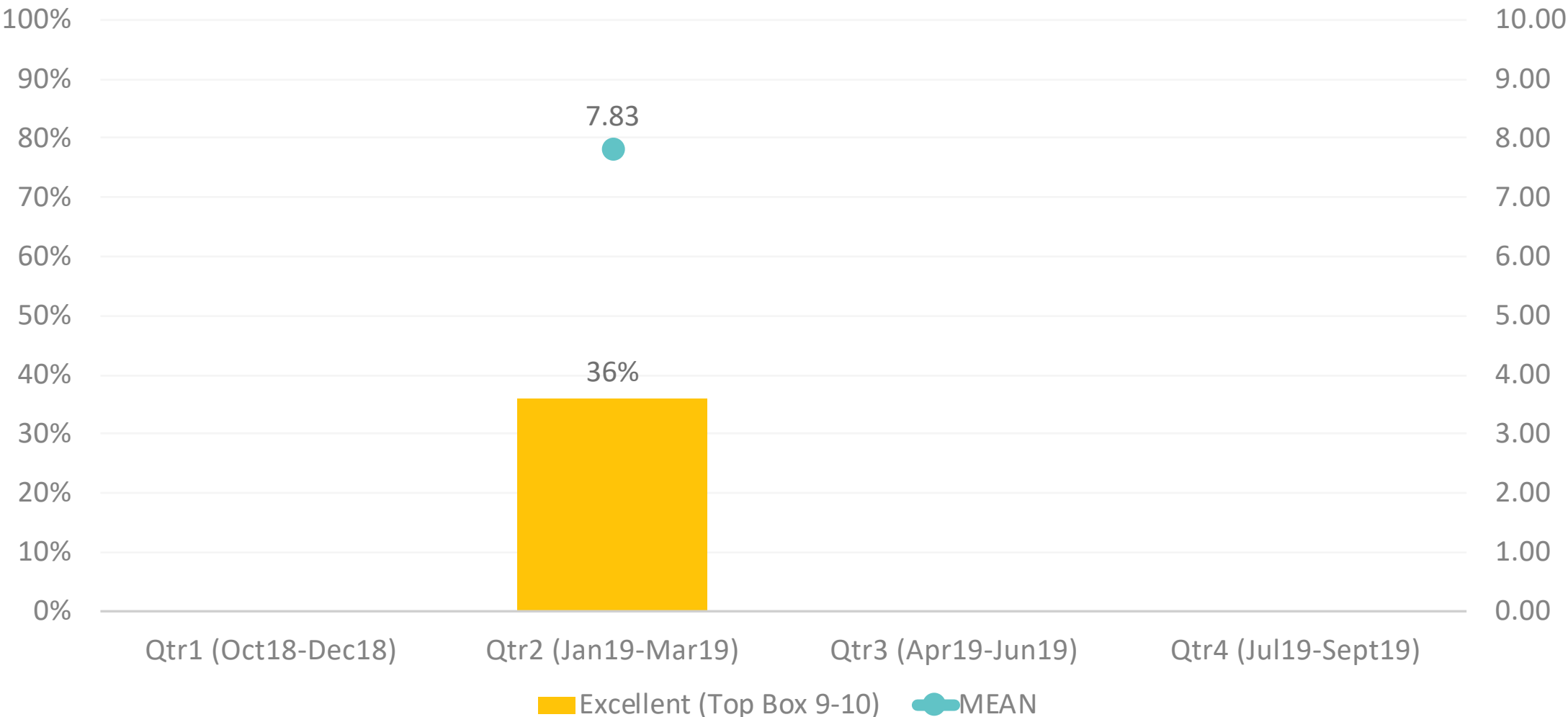
# SATISFACTION – SIGHTSEEING AREAS



# SATISFACTION – SAFETY & SECURITY

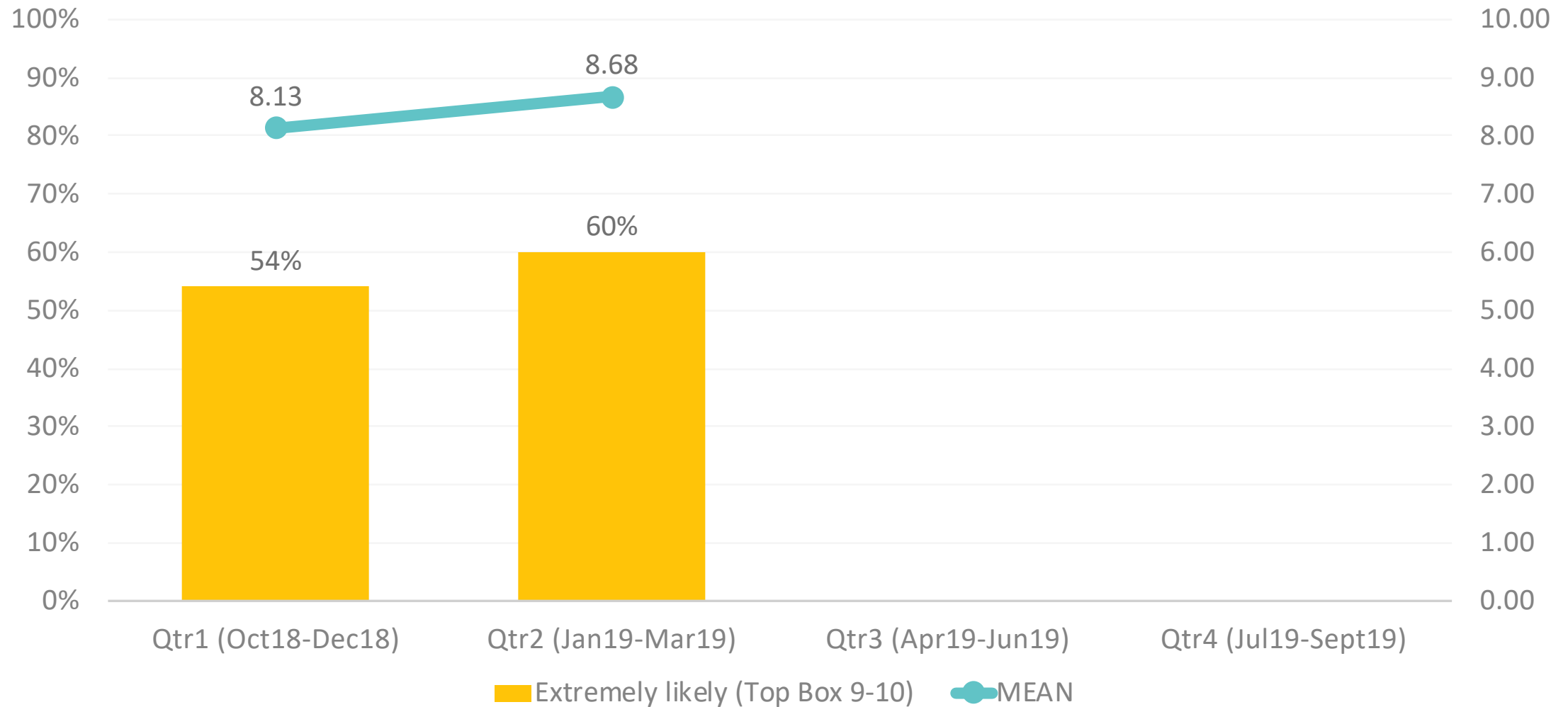


# SATISFACTION – ACCOMMODATIONS

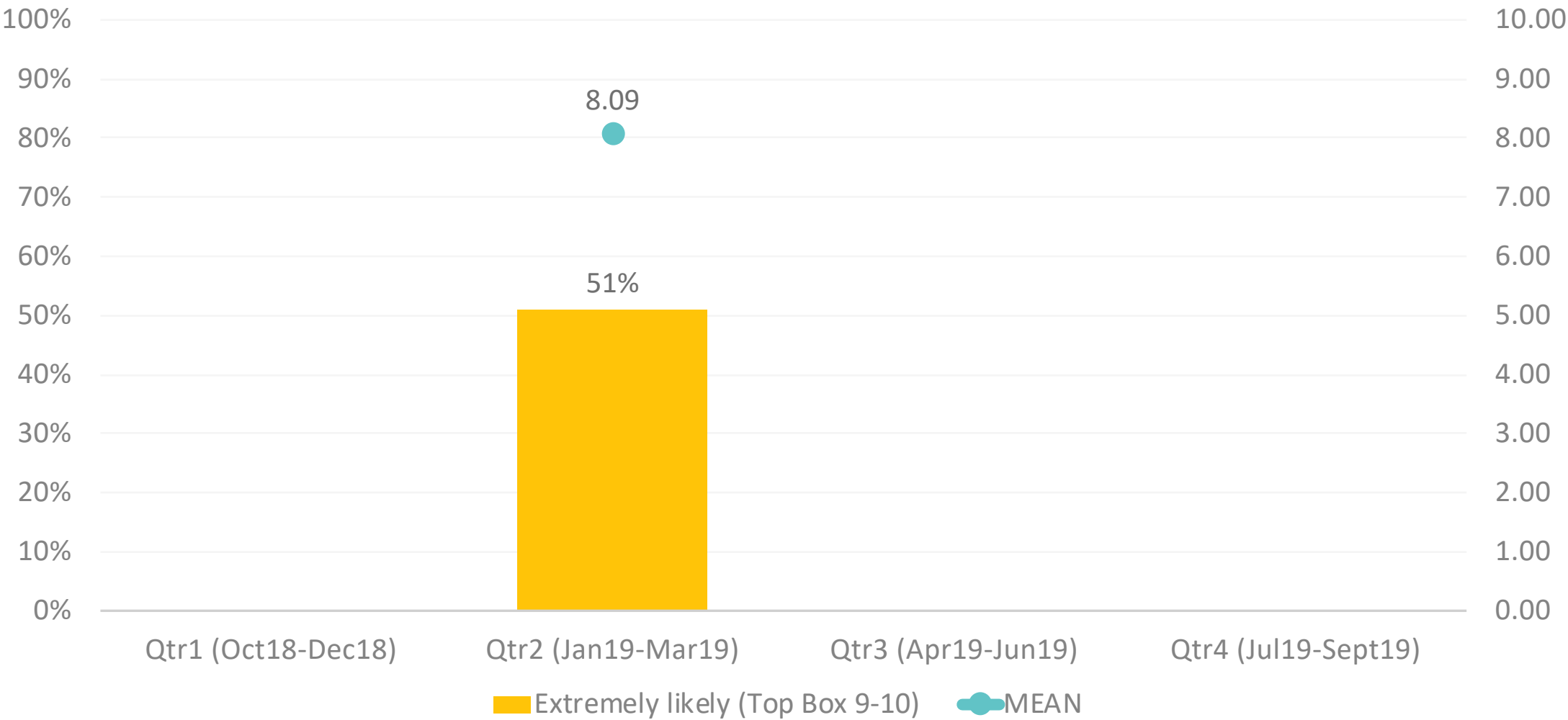




# BRAND ADVOCACY

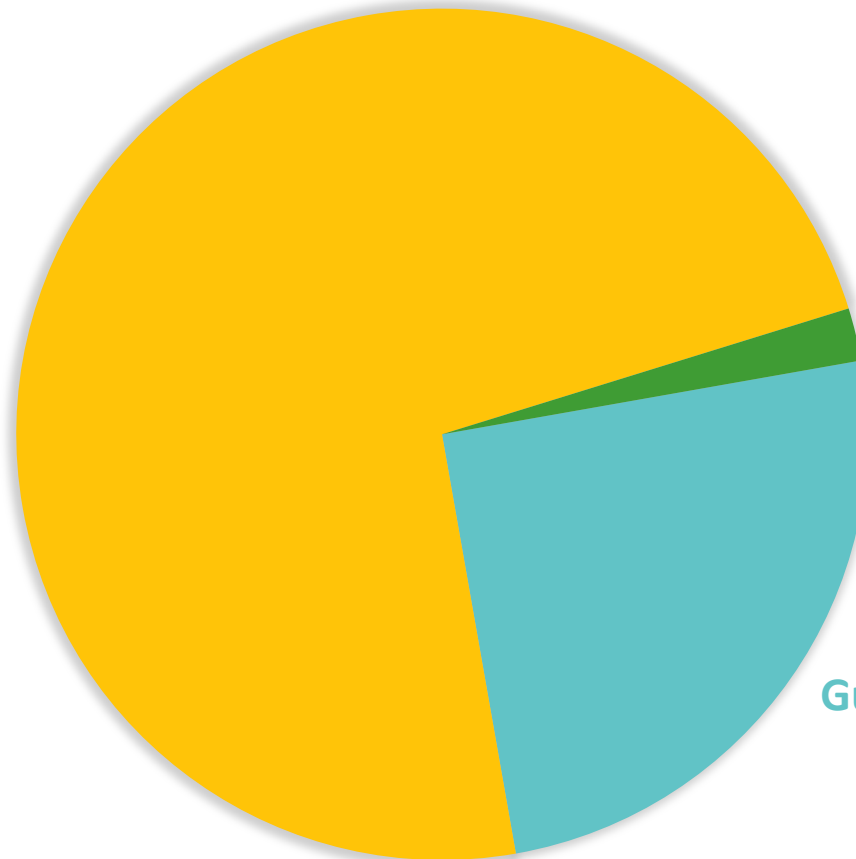


# BRAND LOYALTY



# TRIP EXPECTATIONS

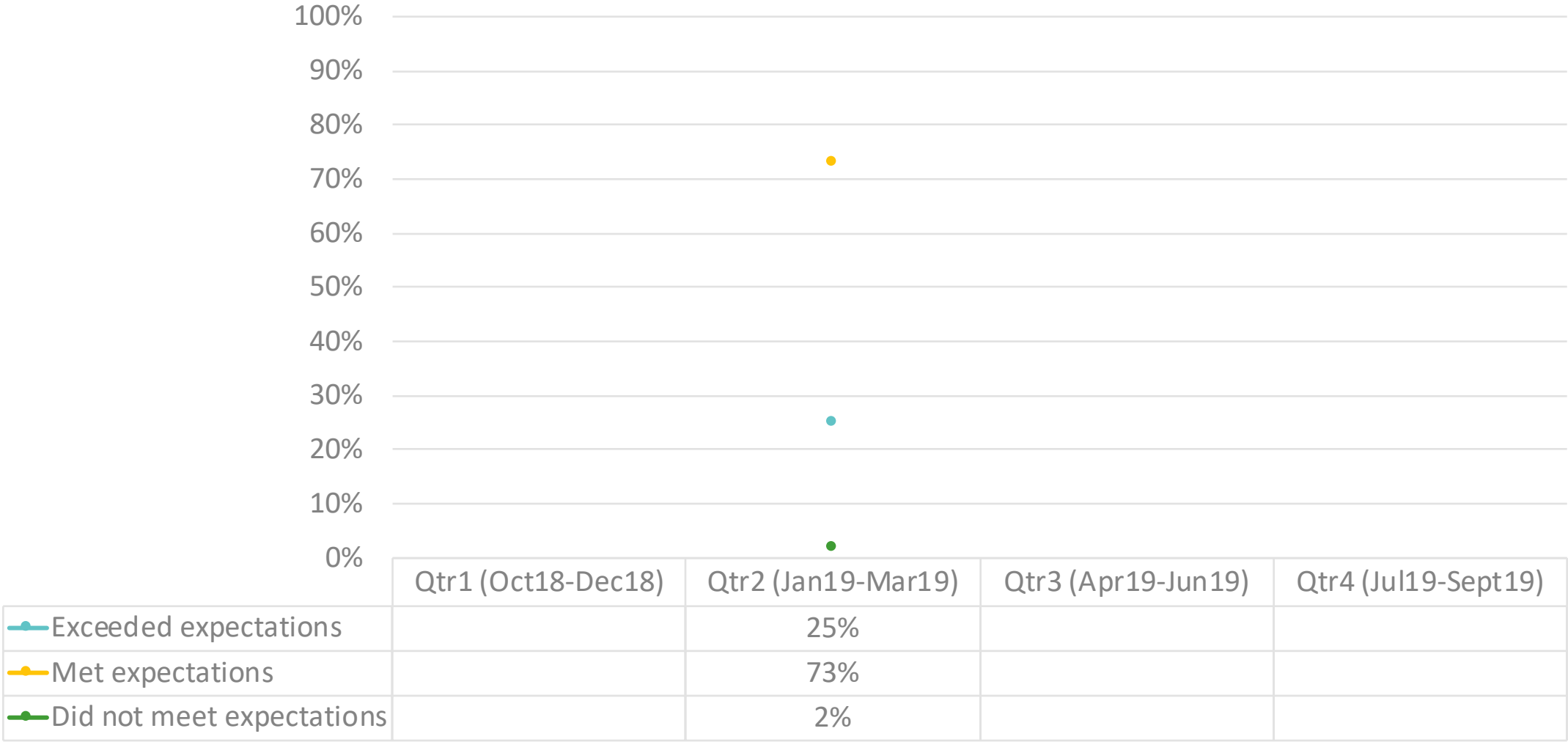
Guam met my  
expectations  
73%



Guam did not meet  
my expectations  
2%

Guam exceeded my  
expectations  
25%

# TRIP EXPECTATIONS – TRACKING



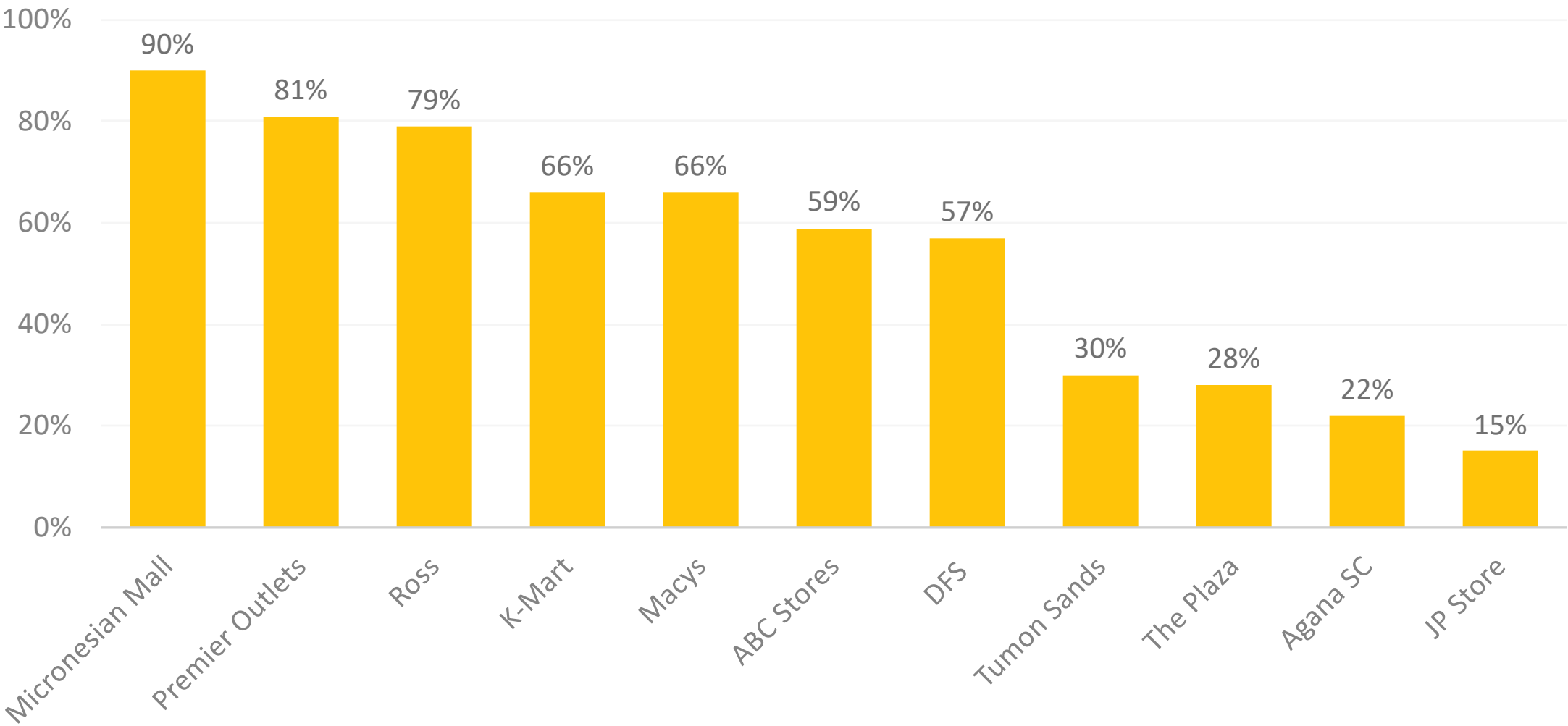


## SECTION 5

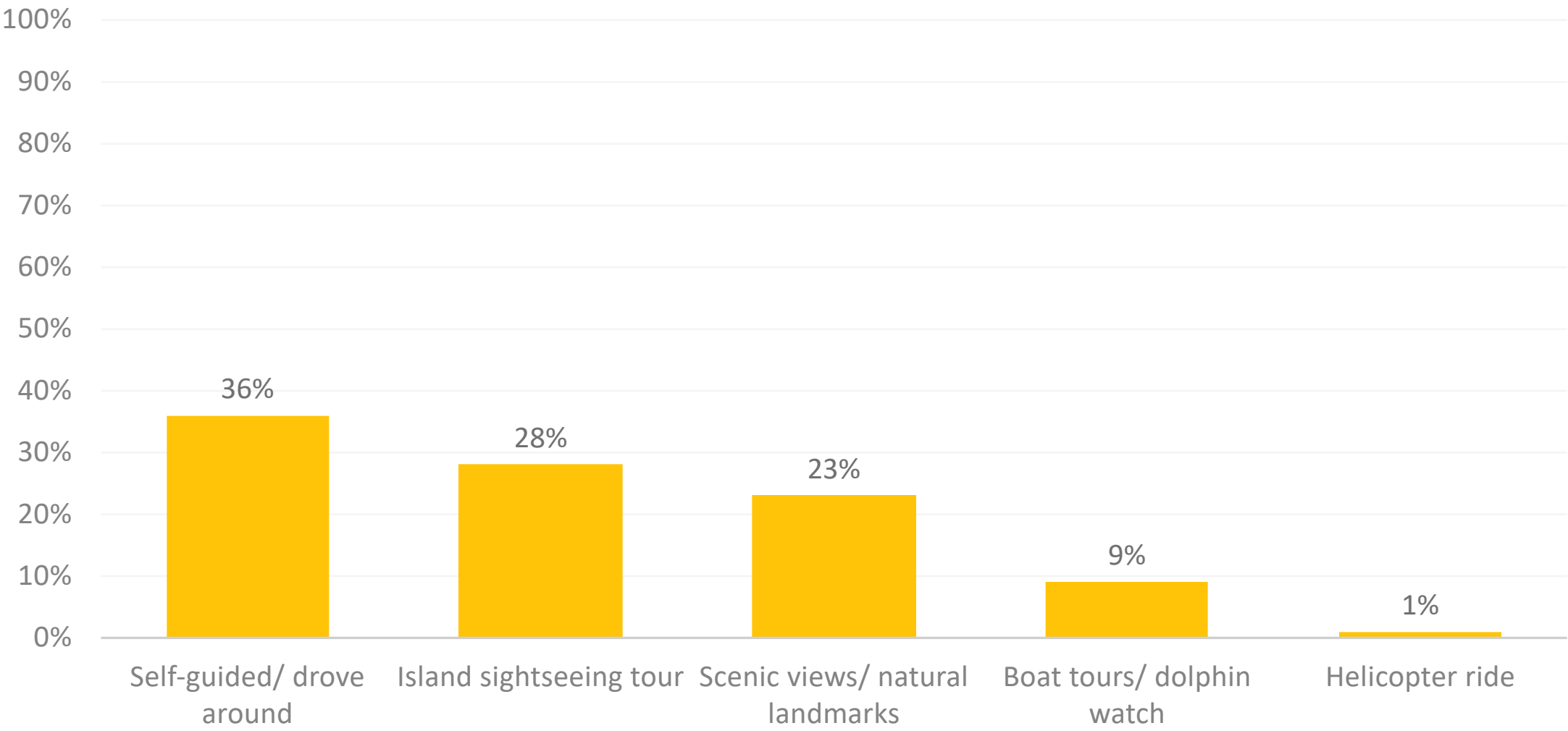
# VISITOR ACTIVITIES



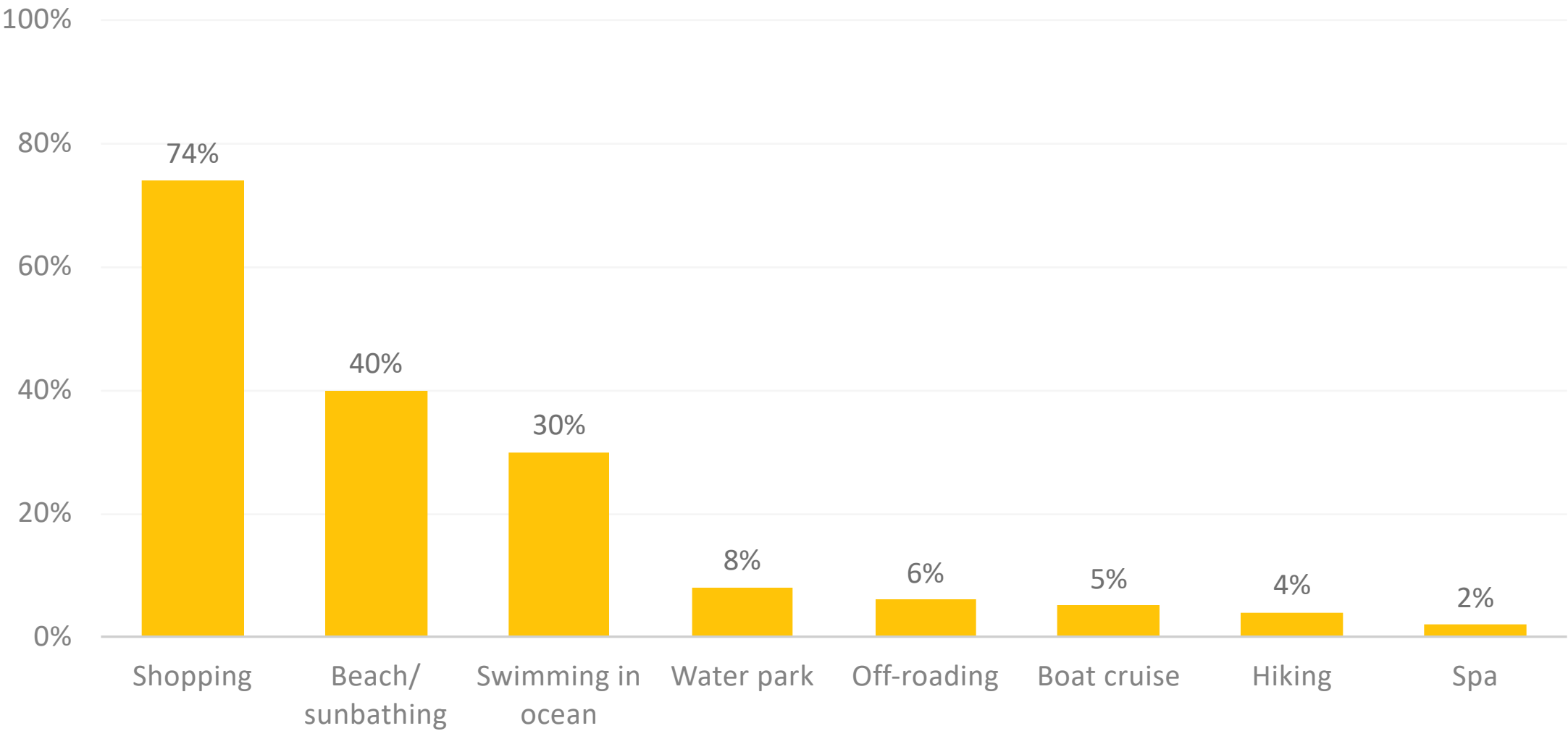
# SHOPPING AREAS – PENETRATION



# ACTIVITIES – SIGHTSEEING

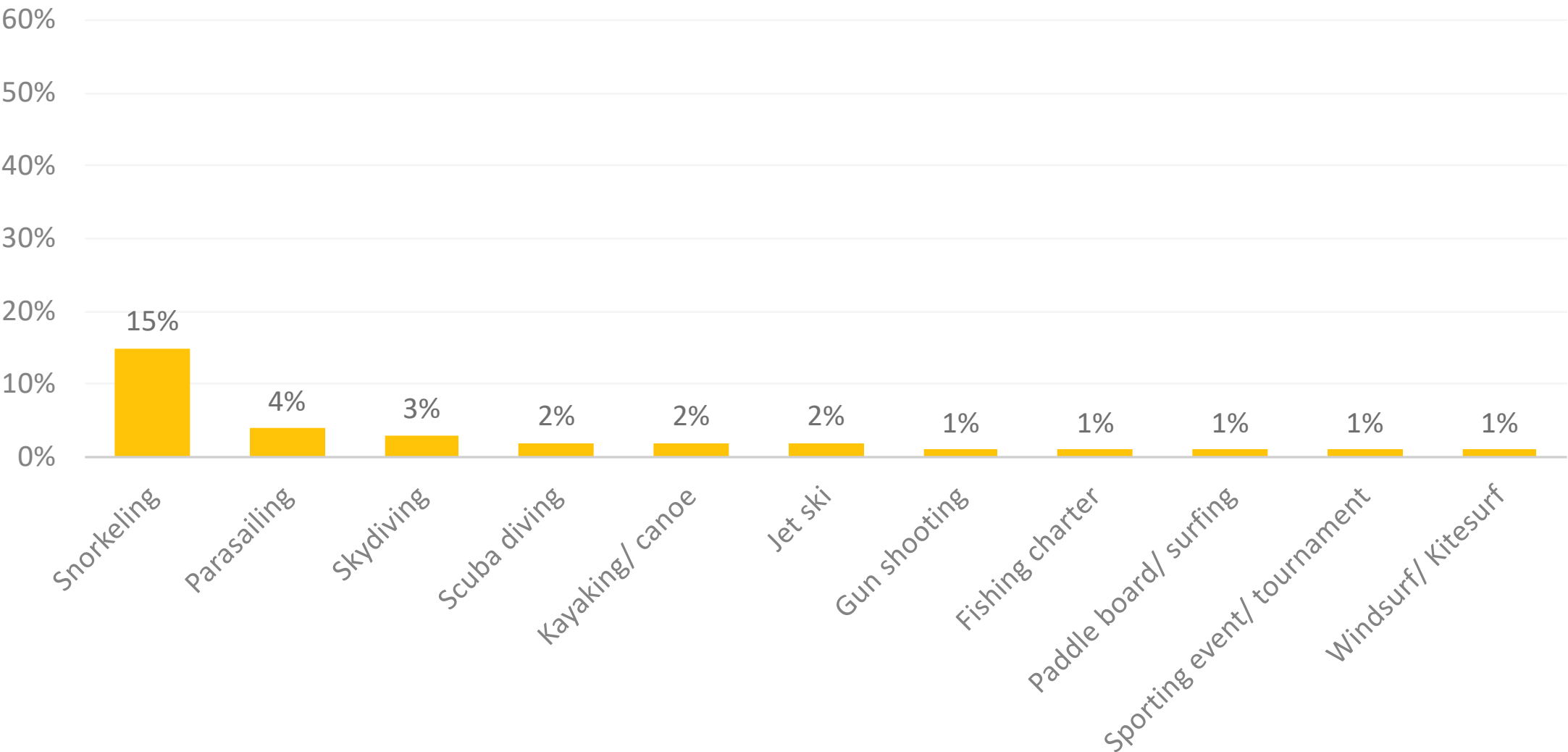


# ACTIVITIES – RECREATION

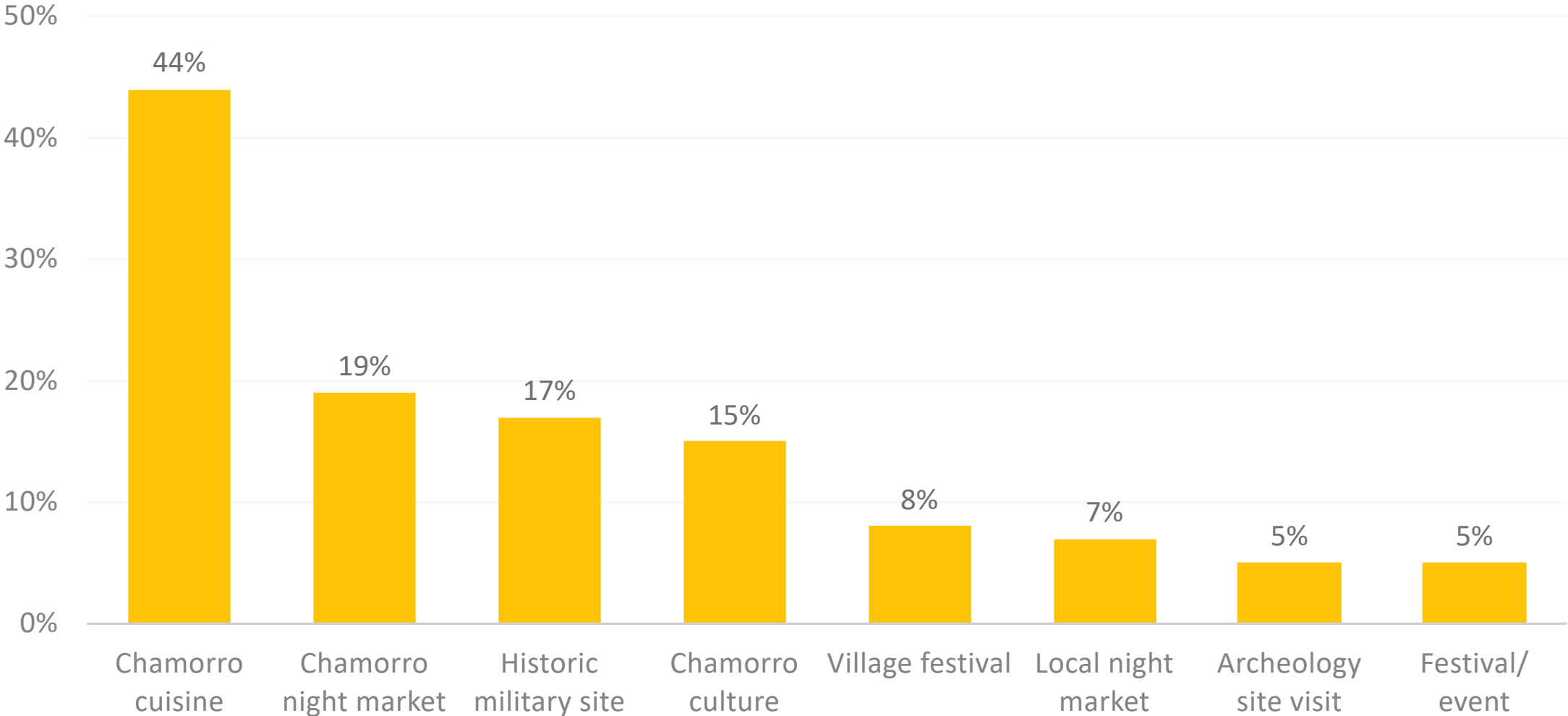




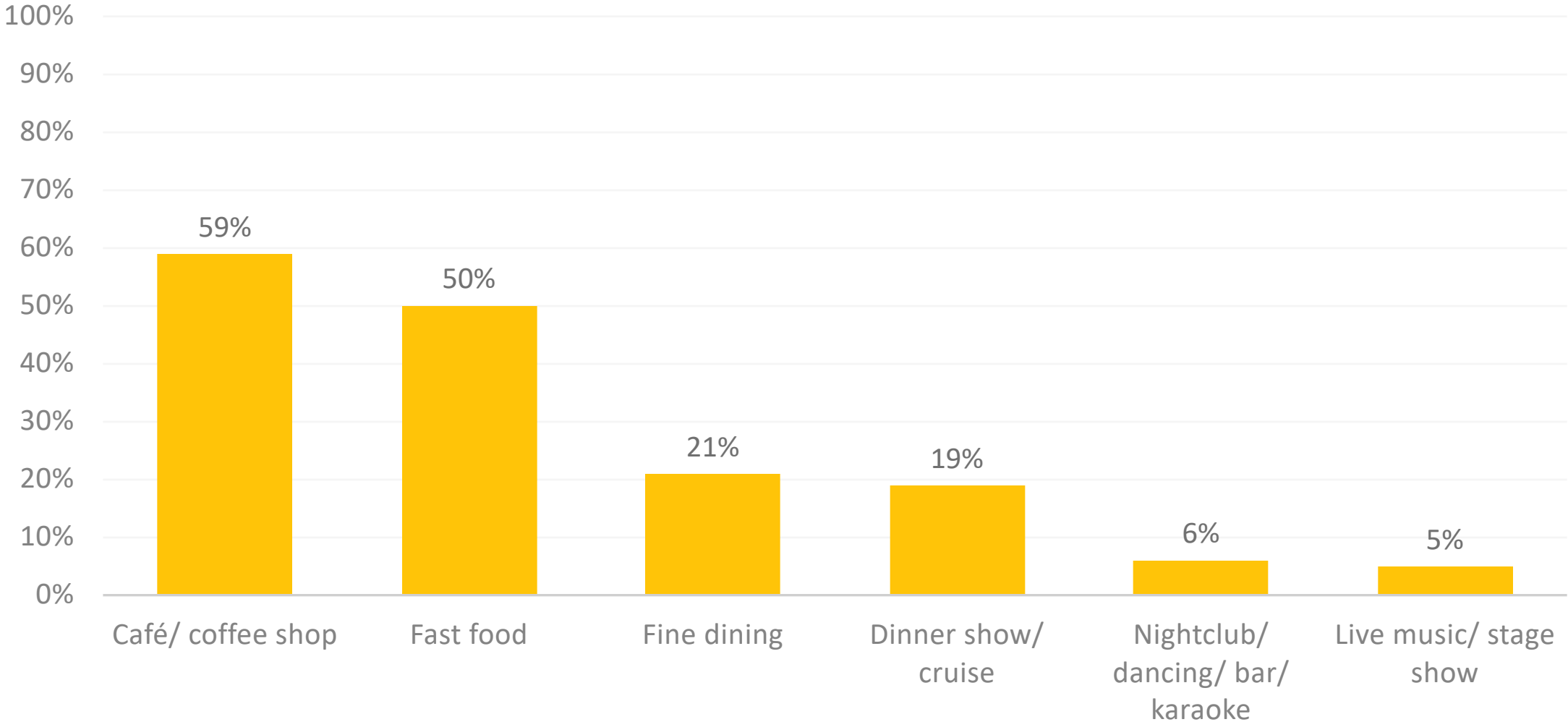
# ACTIVITIES – SPORTS



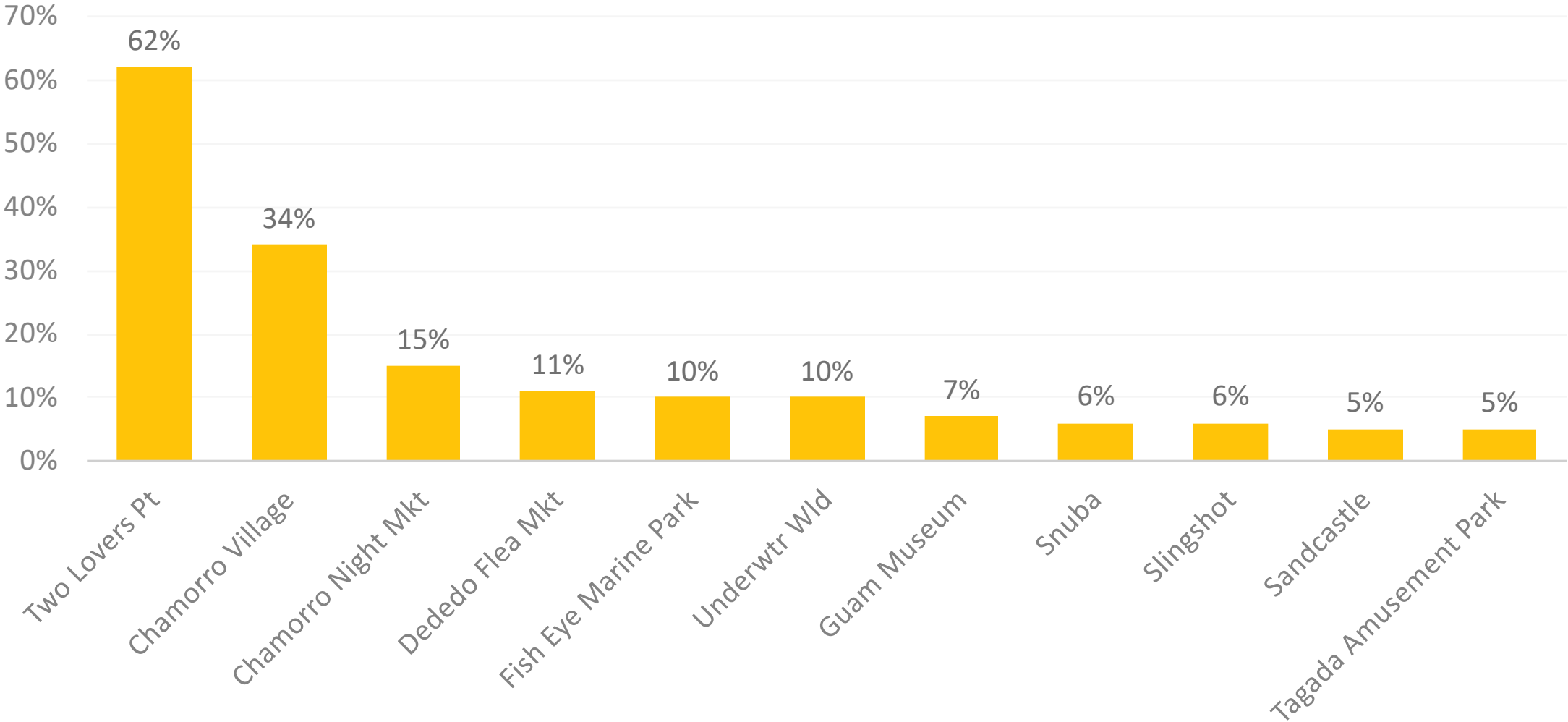
# ACTIVITIES – HISTORY, CULTURE, ARTS



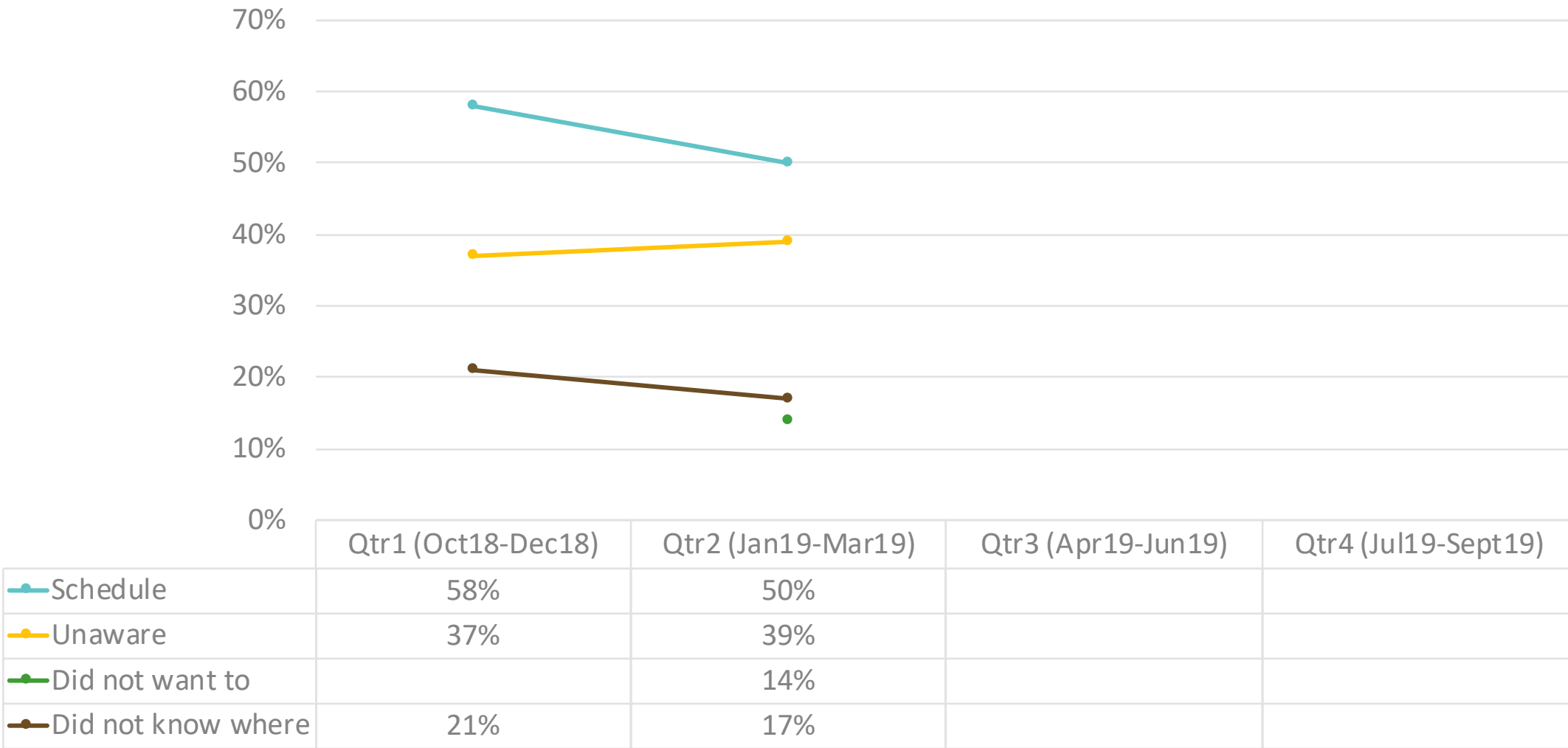
# ACTIVITIES – ENTERTAINMENT & DINING



# LOCAL ATTRACTIONS – TOP RESPONSES (5%+)



# LOCAL CULTURE – OBSTACLES





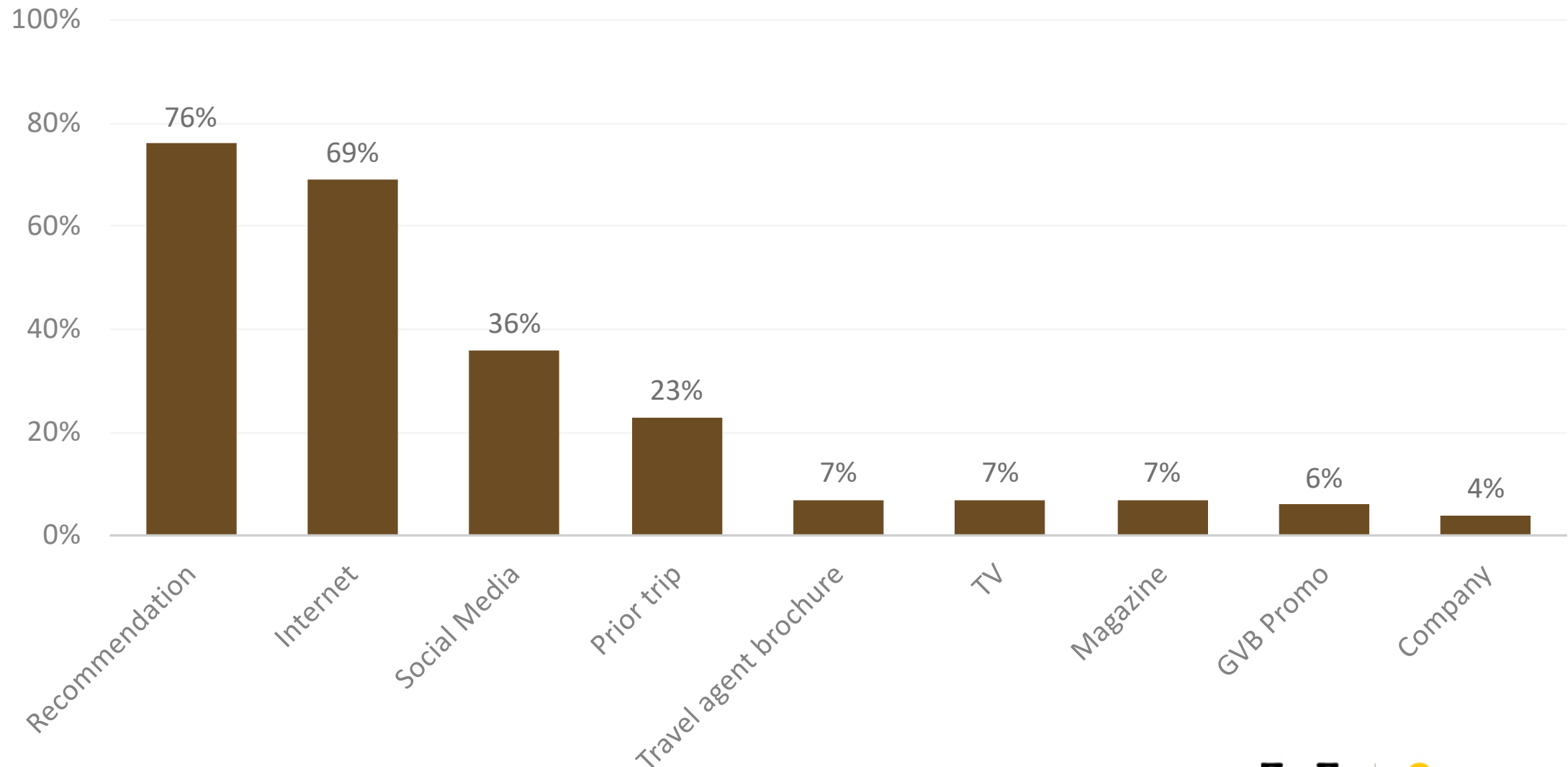
SECTION 6

# SOURCES OF INFORMATION





# PRE-ARRIVAL SOURCES OF INFORMATION



# PRE-ARRIVAL SOURCES OF INFORMATION - SEGMENTATION

## GVB VISITOR SATISFACTION STUDY

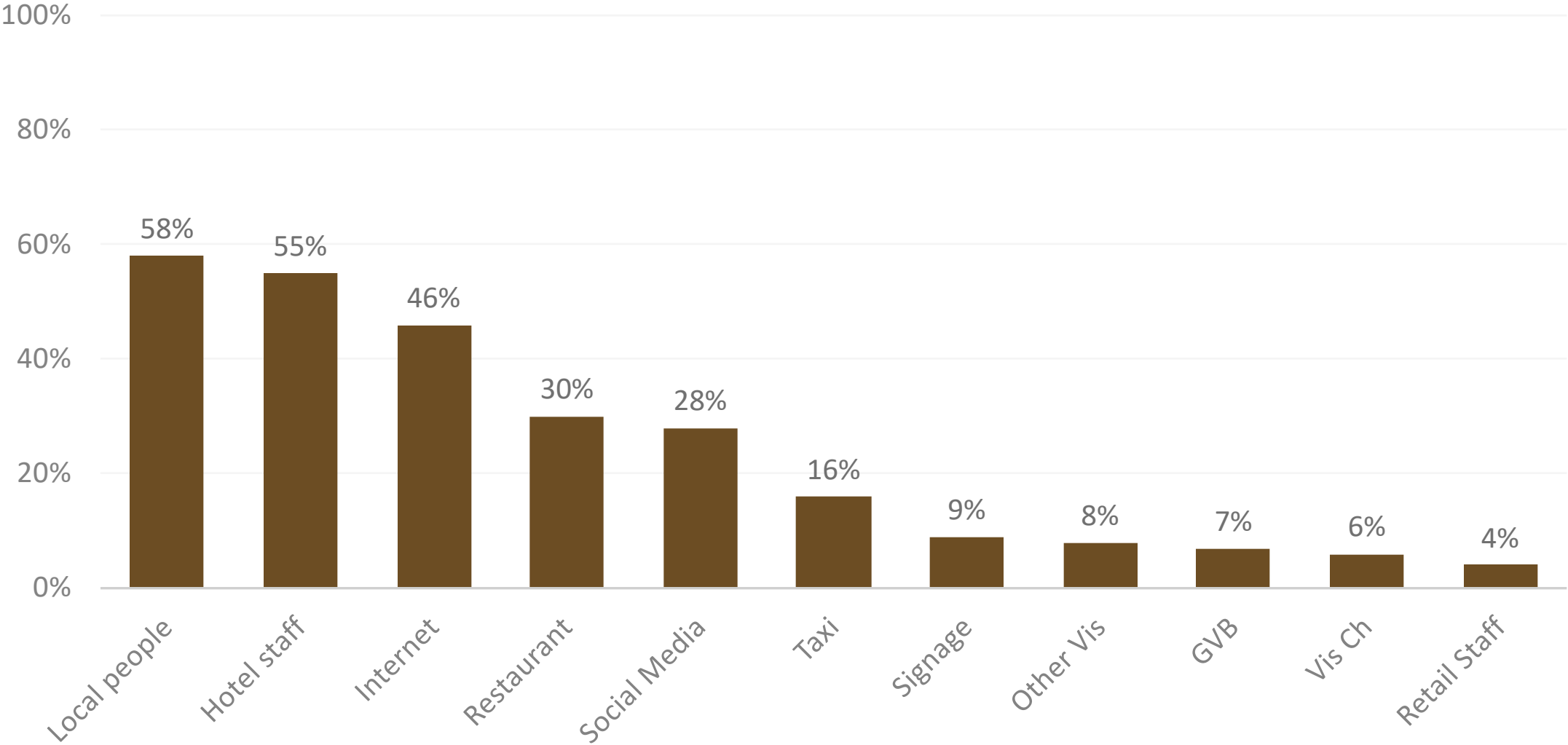
**Q5 Please select the top three sources of information you used to find out about Guam before your trip**

	TOTAL	FAMILY	FIT	MICE
	-	-	-	-
Q5 Friend or relative	76%	82%	75%	100%
Internet/Mobile App	69%	77%	70%	100%
Social media	36%	32%	36%	
I have been to Guam before	23%	26%	24%	100%
Travel agent brochure	7%	11%	8%	
TV	7%	4%	7%	
Magazine (consumer)	7%	5%	7%	
Guam Visitors Bureau promotional activities	6%	7%	6%	
Co-worker/ company travel department	4%	2%	4%	
Newspaper	1%	2%	1%	
Guam Visitors Bureau office	1%		1%	
Radio	1%		1%	
Travel trade shows	1%		1%	
Total	107	57	106	1

\*Prepared by Anthology Research\*



# ONISLE SOURCES OF INFORMATION



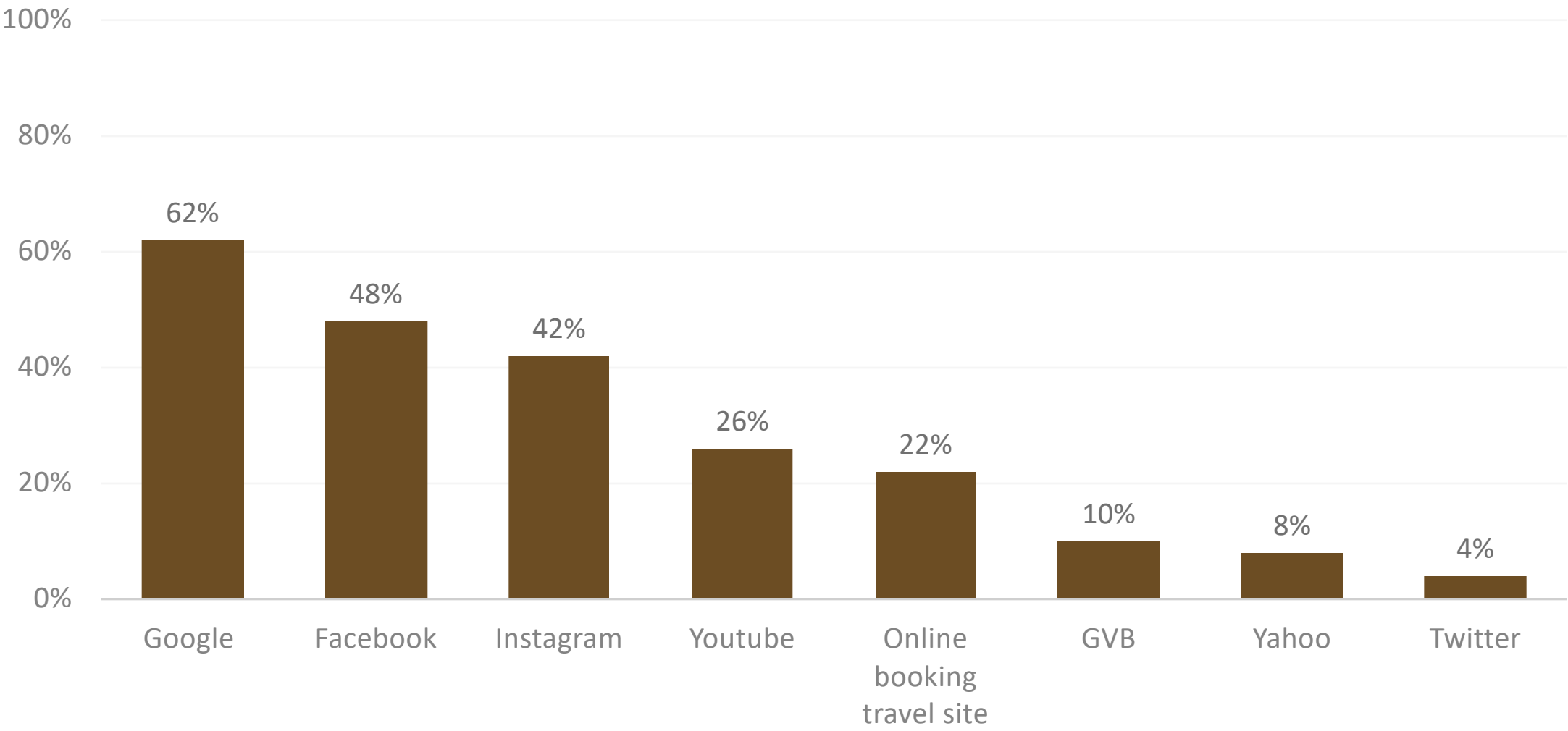
# ONISLE SOURCES OF INFORMATION

**GVB VISITOR SATISFACTION STUDY**  
**Q6 Please select the top three sources of information you used to find out about Guam while you were here**

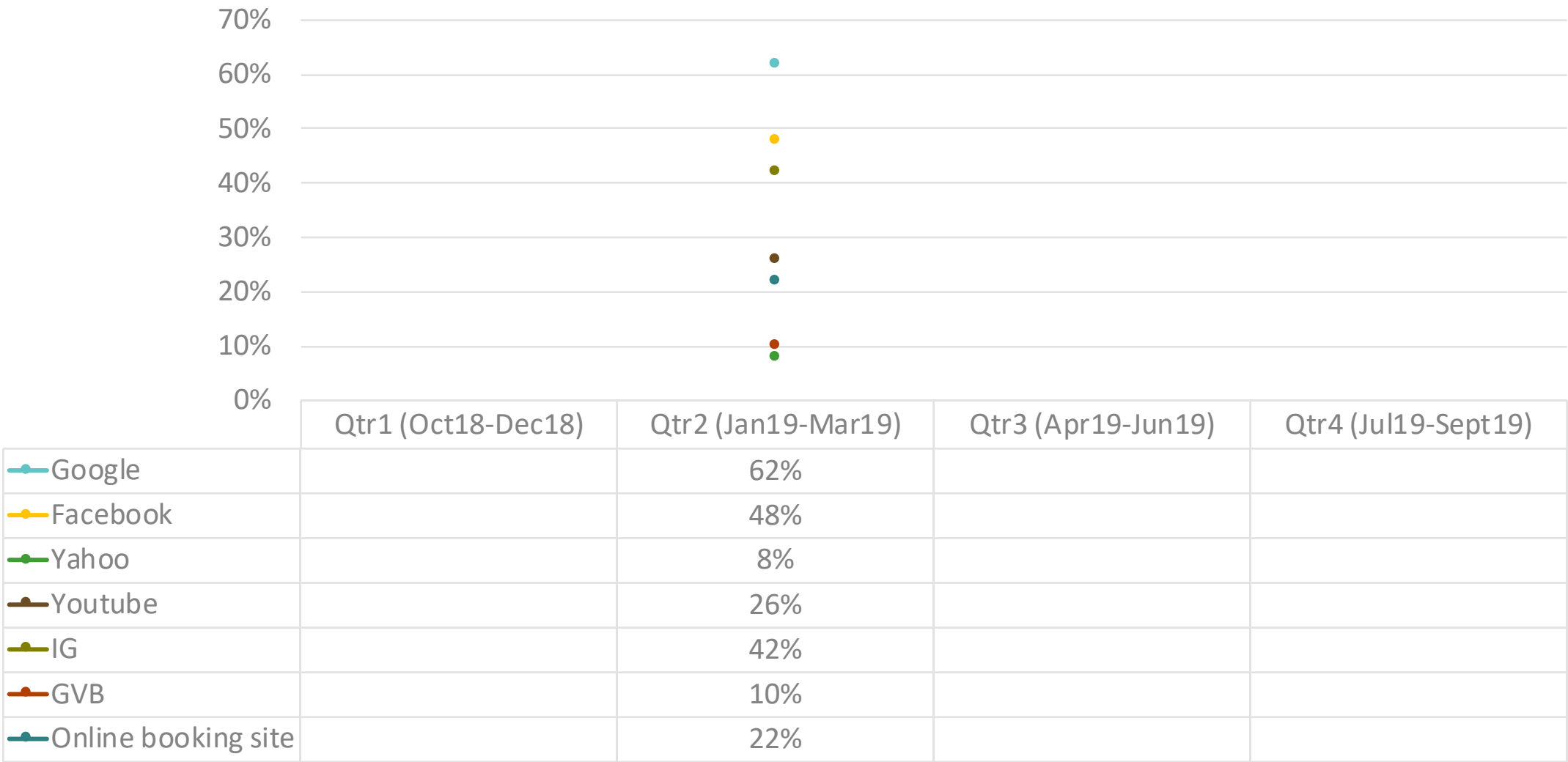
		TOTAL	FAMILY	FIT	MICE
		-	-	-	-
Q6	Local people	58%	54%	58%	100%
	Hotel staff	55%	51%	56%	
	Internet/ Mobile App	46%	42%	46%	100%
	Restaurant staff (outside hotel)	30%	33%	30%	
	Social Media	28%	32%	28%	
	Taxi drivers	16%	21%	16%	100%
	Signs/ advertisement	9%	5%	9%	
	Other visitors	8%	7%	8%	
	Guam Visitors Bureau	7%	9%	7%	
	Visitors channel	6%	5%	6%	
	Retail staff	4%	5%	4%	
	Local publication	4%	5%	4%	
	Tour staff	3%	4%	3%	
	Guide books I brought with me	2%	2%	2%	
	Total	107	57	106	1

\*Prepared by Anthology Research\*

# ONLINE SOURCES OF INFORMATION



# ONLINE SOURCES OF INFORMATION



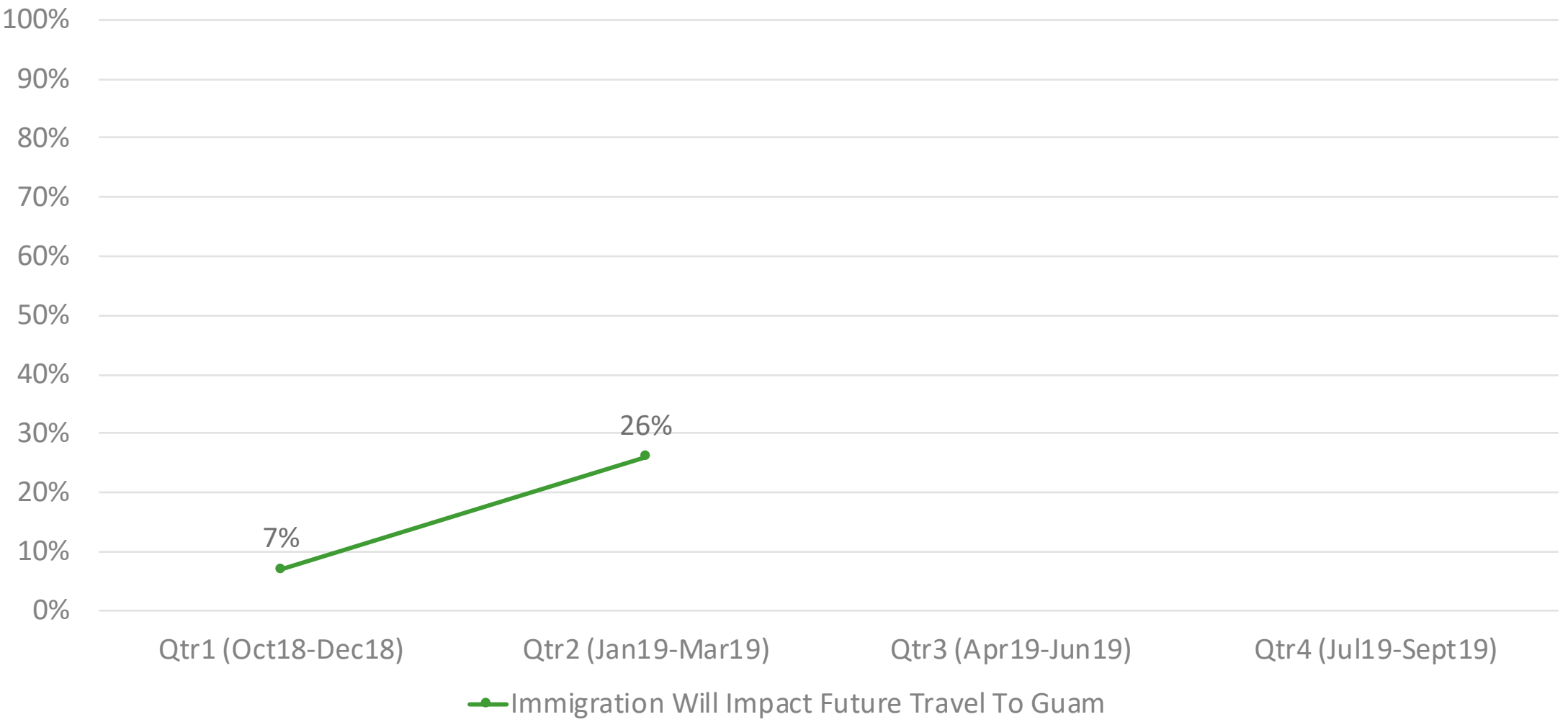


SECTION 7

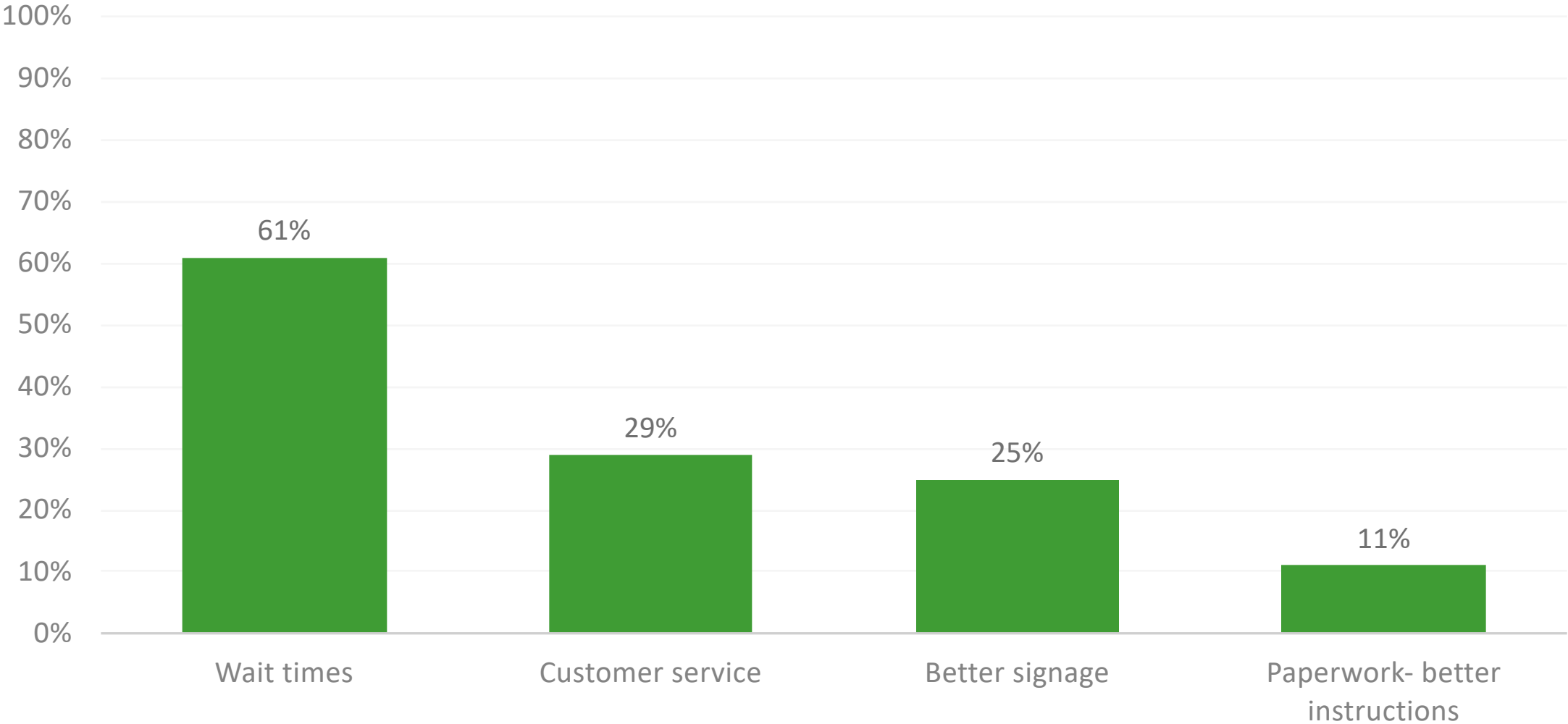
# IMMIGRATION



# IMPACT OF AIRPORT IMMIGRATION SVC ON FUTURE TRAVEL TO GUAM



# AIRPORT – SECURITY/ IMMIGRATION ISSUES







SECTION 8

# ADVANCED STATS





# 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 ( $p < .05$ ) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.
- The predictor variables (drivers) are ranked on the percentage they account for the dependent variable. The top two ranked independent variables generally account for the largest percentages of the dependent variable and are thus the best predictors (drivers) of the dependent variable.

# DRIVERS – OVERALL SATISFACTION

Comparison of Drivers of Overall Satisfaction 2nd Qtr. 2019	
Drivers:	2nd Qtr. 2019 rank
Entertainment	
Shopping	
Dining	
Beaches	
Parks	
Roads	
Sightseeing Areas	1
Being a safe and secure destination	
% of Overall Satisfaction Accounted For:	4.2%
NOTE: Only significant drivers are included.	

# DRIVERS – OVERALL SATISFACTION

- **Overall satisfaction** with the Philippine visitor's experience on Guam is driven by one significant factor in the 2<sup>nd</sup> Quarter 2019 Period. It is:
  - **Sightseeing areas.**
- With this factor, the overall  $r^2$  is .042 meaning that **4.2% of overall satisfaction is accounted for by this factor.**

# DRIVERS – ONISLE EXPENDITURES

Comparison of Drivers of Per Person On Island Expenditures 2nd Qtr. 2019	
	2nd Qtr. 2019 rank
Drivers:	
Entertainment	1
Shopping	
Dining	
Beaches	
Parks	
Roads	
Sightseeing Areas	
Being a safe and secure destination	
% of Overall Satisfaction Accounted For:	10.3%
NOTE: Only significant drivers are included.	

# DRIVERS – ONISLE EXPENDITURES

- **Per Person On Island Expenditure** of Philippine visitors on Guam is driven by one significant factor in the 2<sup>nd</sup> Quarter 2019 Period. It is:
  - **Entertainment.**
- With this factor, the overall  $r^2$  is .103 meaning that **10.3% of per person on island expenditure is accounted for by this factor.**