



Guam Visitors Bureau

Philippine Visitor Tracker Exit Profile & Market Segmentation Report

FY2019 - QTR.3 (APR-JUN 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 103 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 103 is +/- 9.66 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 +/- 9.66 percentage points.

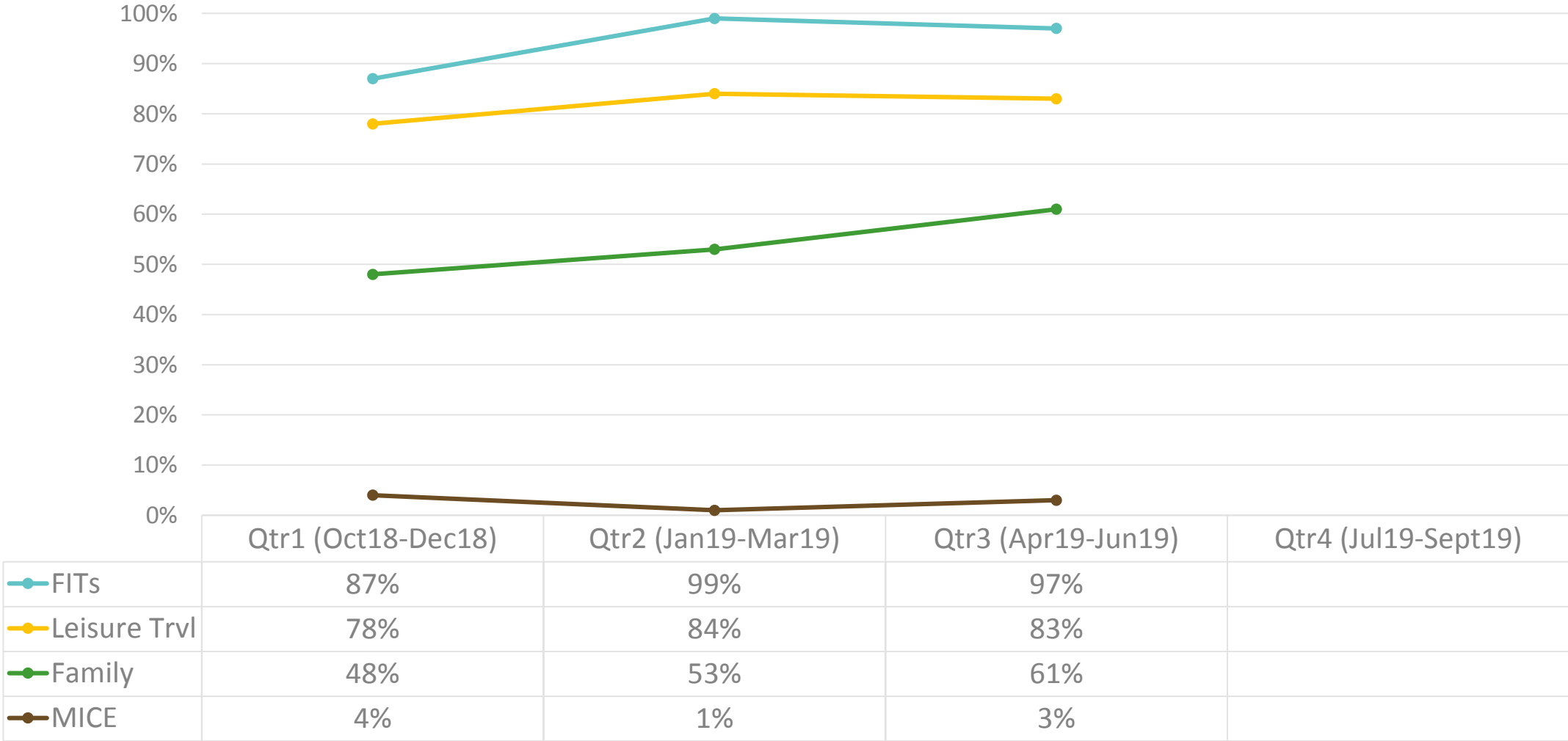
Objectives

- 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 (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



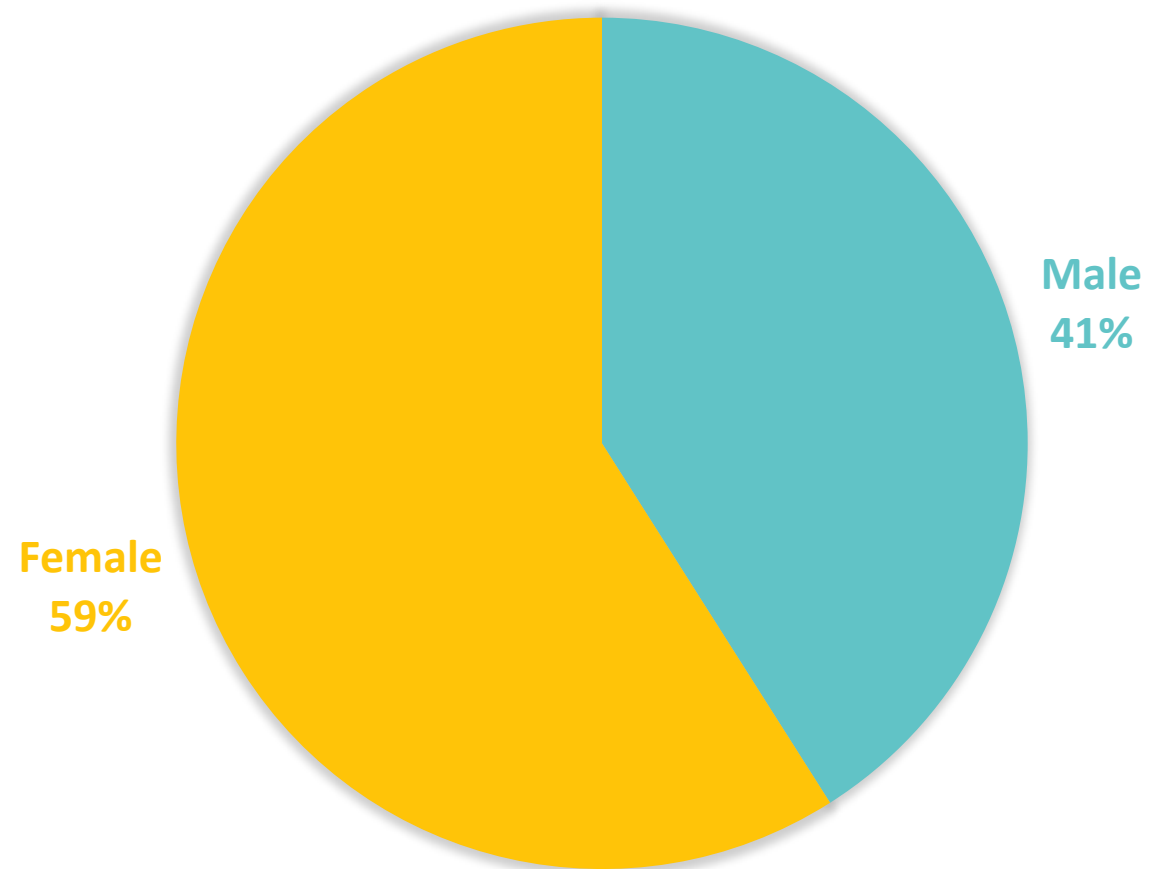


SECTION 1

PROFILE OF RESPONDENTS



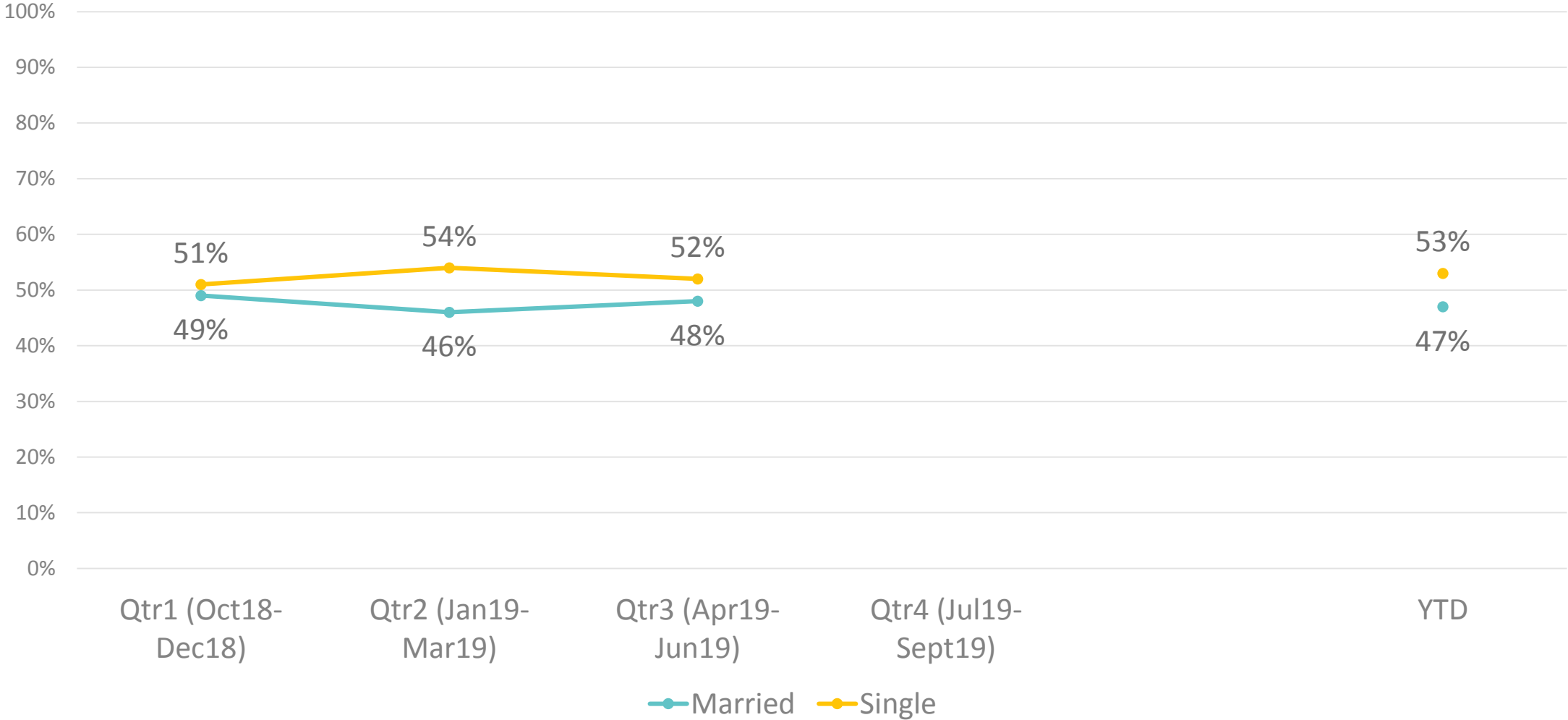
GENDER



MARITAL STATUS



MARITAL STATUS – TRACKING



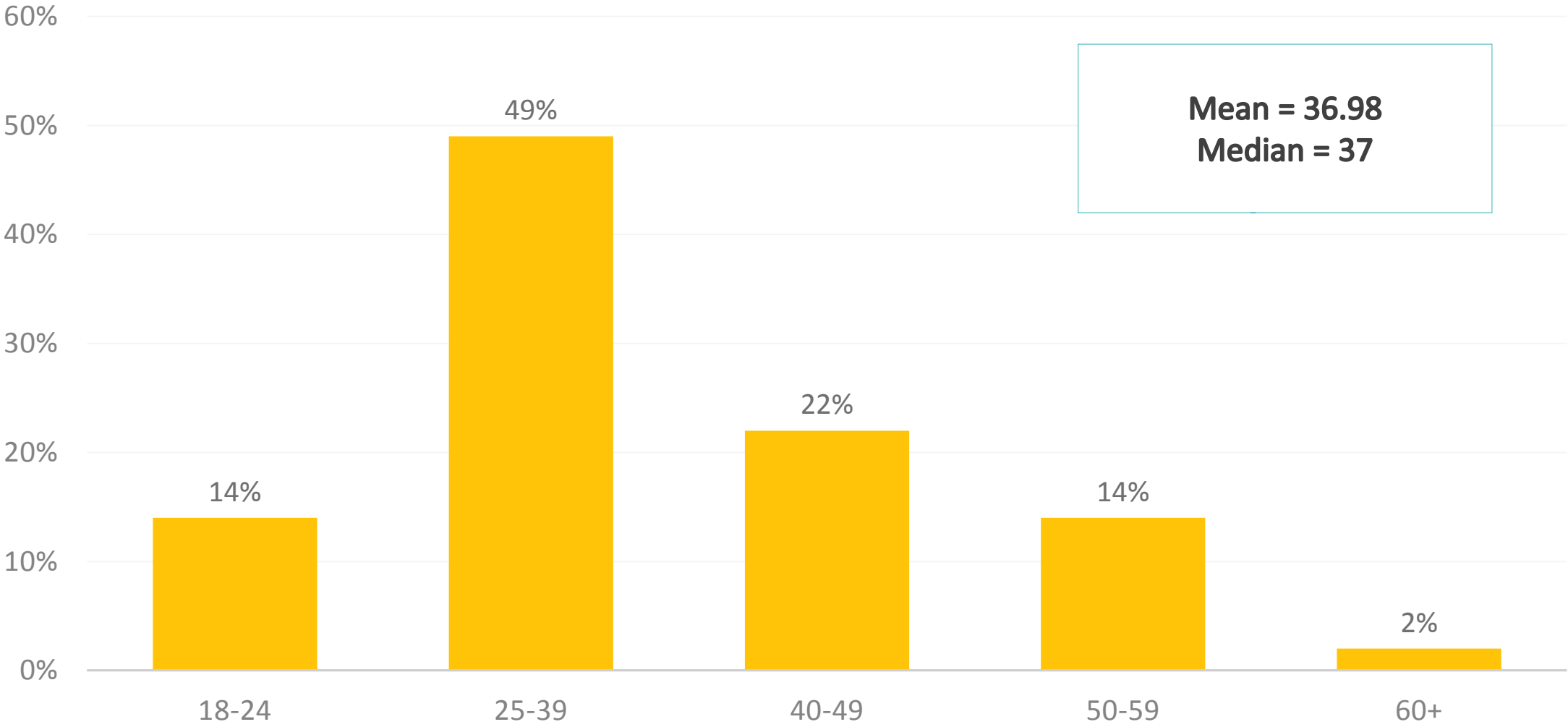
MARITAL STATUS – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
QE Are you married or single?

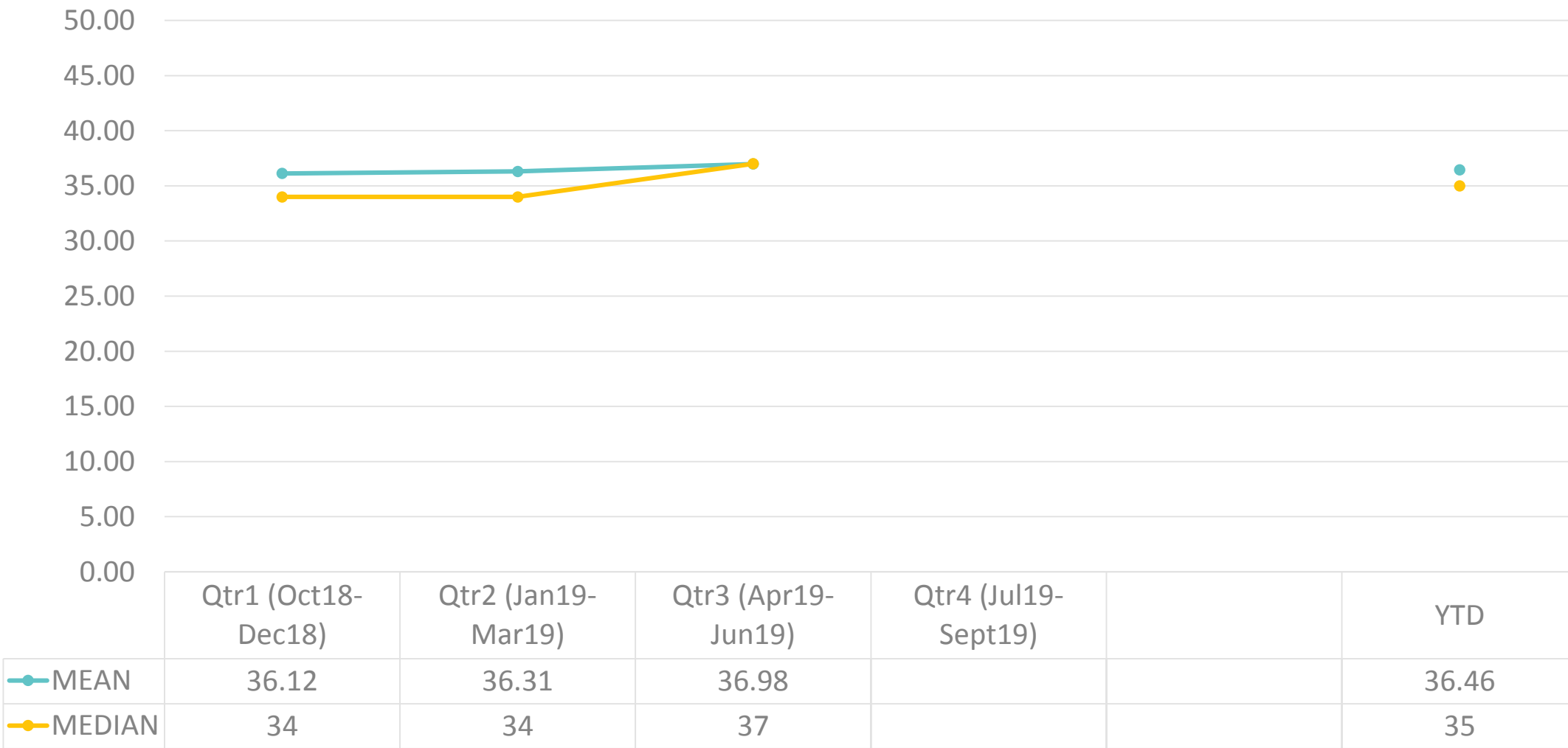
		TOTAL	FAMILY	FIT	MICE
		-	-	-	-
QE	Married	48%	62%	48%	100%
	Single	52%	38%	52%	
	Total	103	63	100	3

Prepared by Anthology Research

AGE



AGE – TRACKING



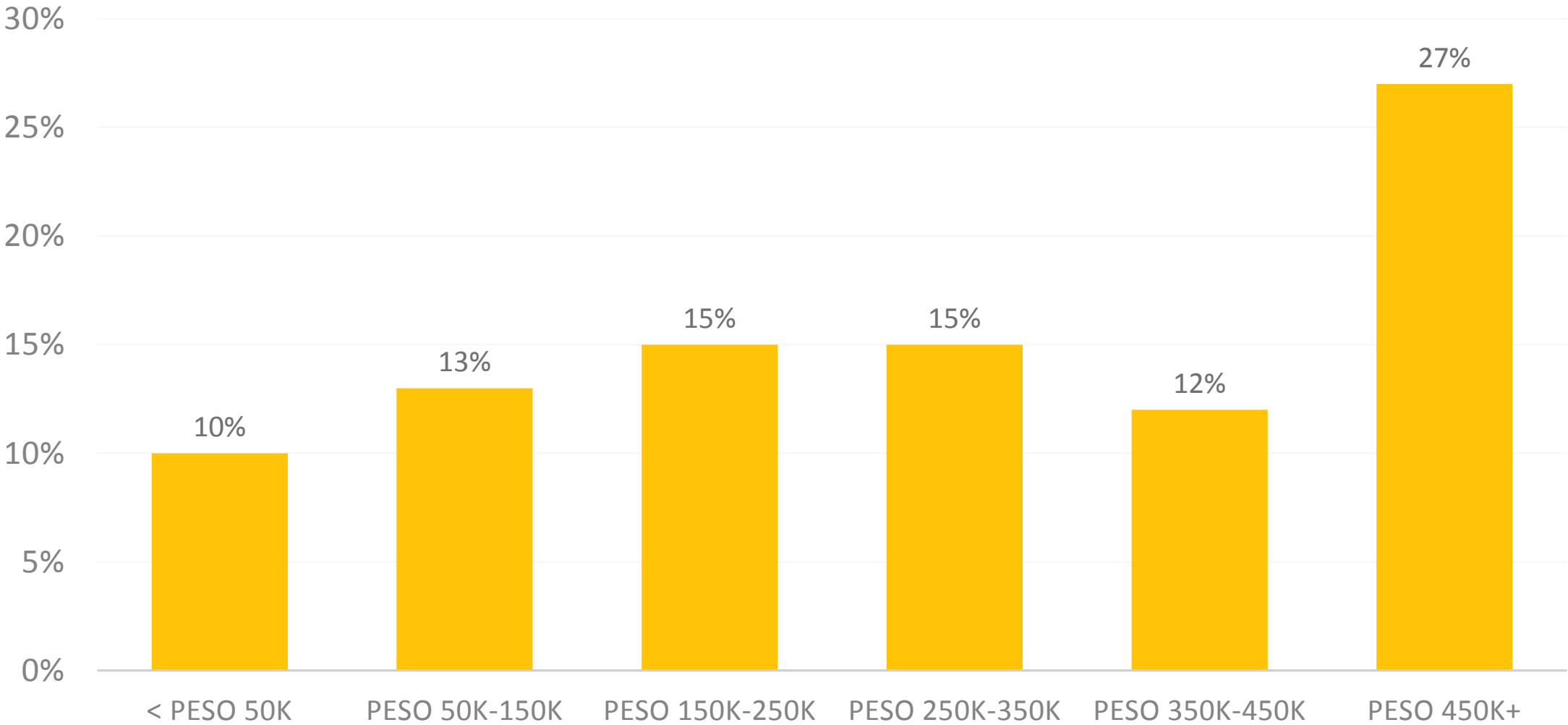
AGE – SEGMENTATION

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

		TOTAL	FAMILY	FIT	MICE
		-	-	-	-
QF	18-24	14%	16%	14%	
	25-39	49%	46%	48%	33%
	40-49	22%	22%	22%	33%
	50-59	14%	14%	14%	33%
	60+	2%	2%	2%	
	Total	103	63	100	3
QF	Mean	36.98	37.16	37.04	43.33
	Median	37	37	37	41

Prepared by Anthology Research

HOUSEHOLD INCOME



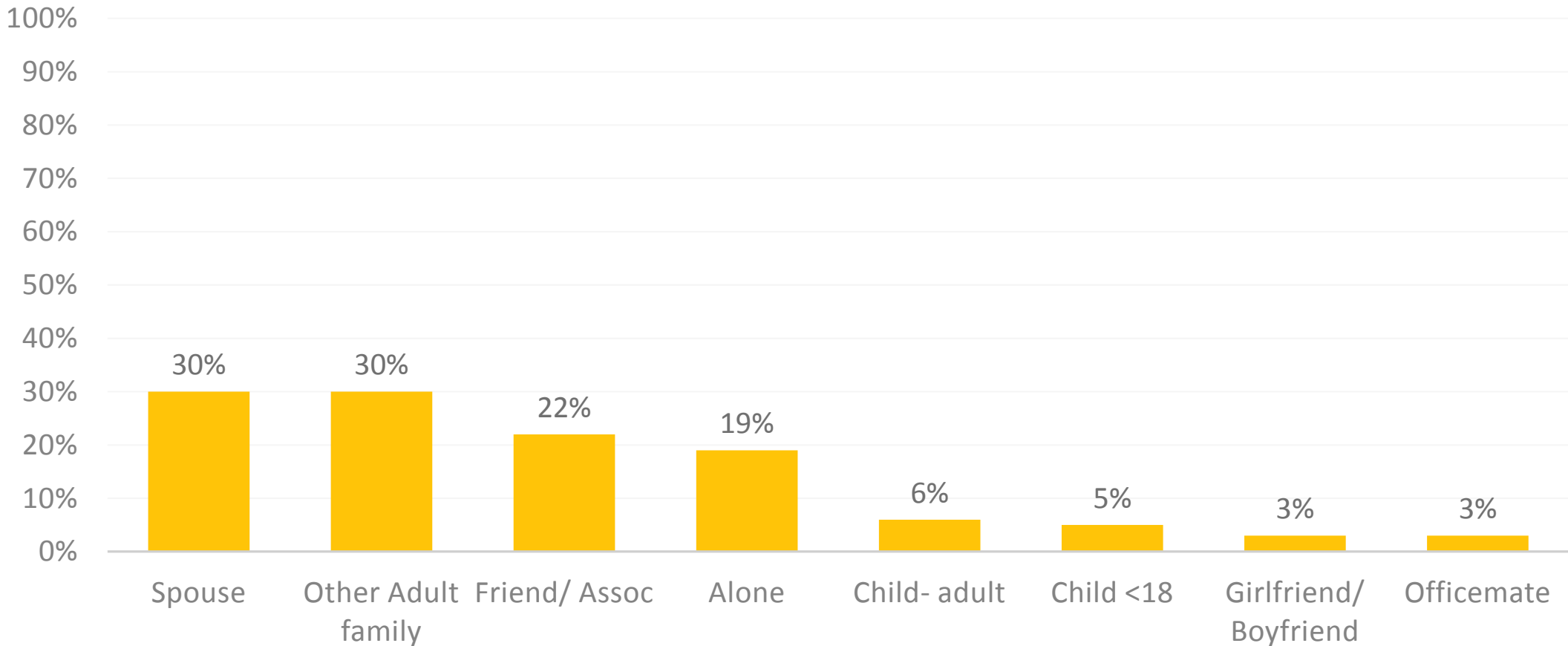
HOUSEHOLD INCOME – SEGMENTATION

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

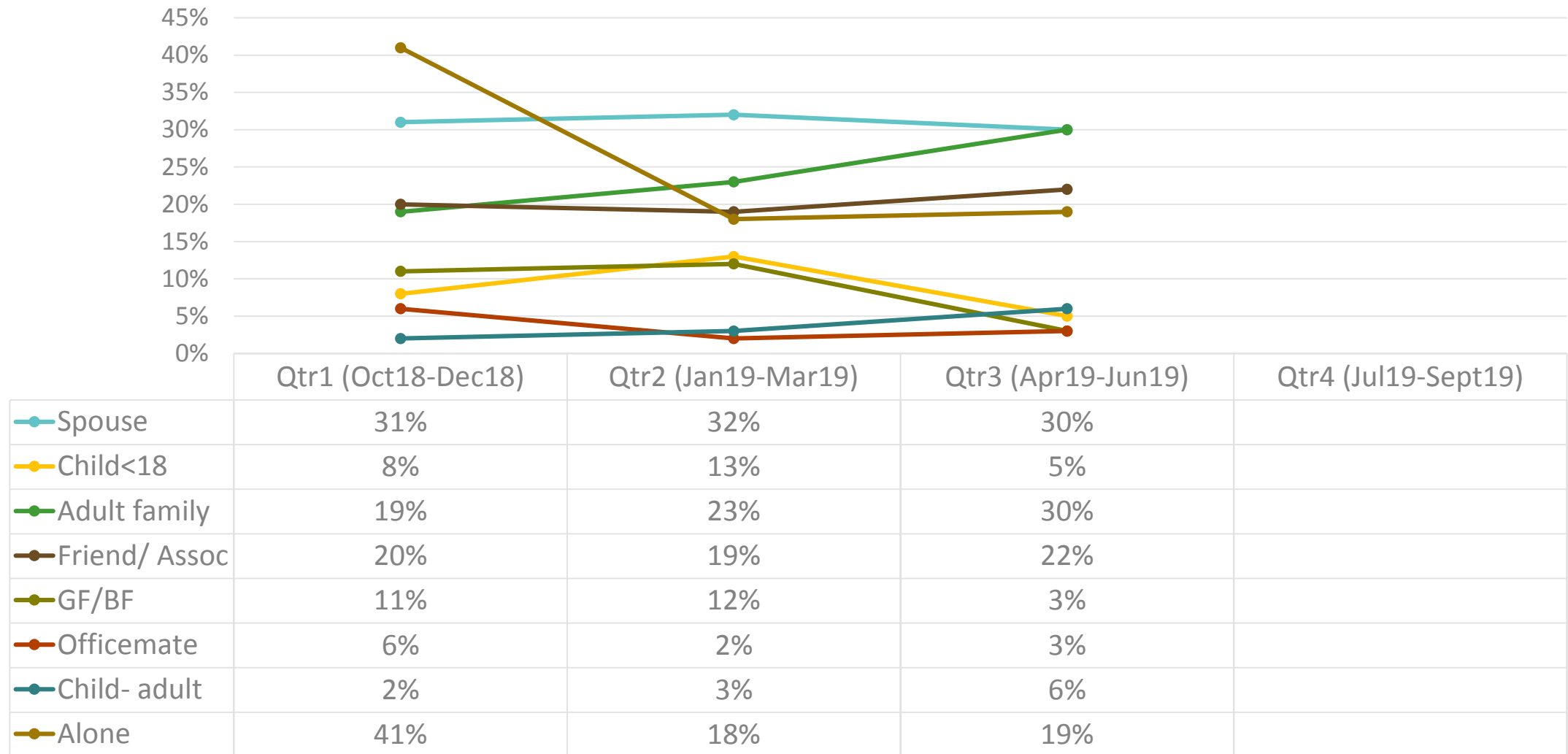
		TOTAL	FAMILY	FIT	MICE
		-	-	-	-
D2	< PESO 50K	10%	11%	8%	
	PESO 50K-150K	13%	10%	13%	
	PESO 150K-250K	15%	10%	14%	
	PESO 250K-350K	15%	19%	15%	33%
	PESO 350K-450K	12%	10%	12%	
	PESO 450K+	27%	30%	28%	33%
	No income	10%	11%	10%	33%
	Total	103	63	100	3

Prepared by Anthology Research

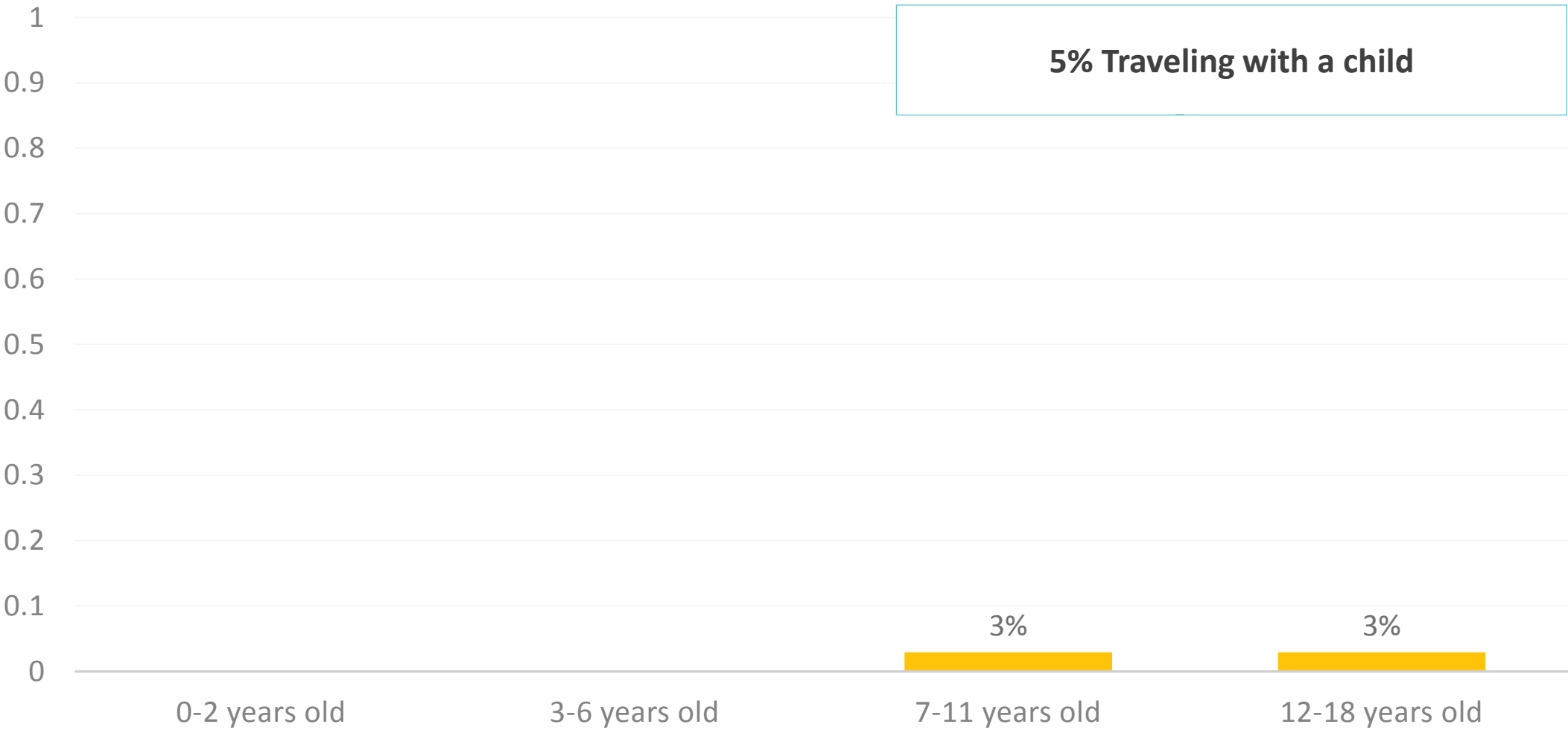
TRAVEL PARTY



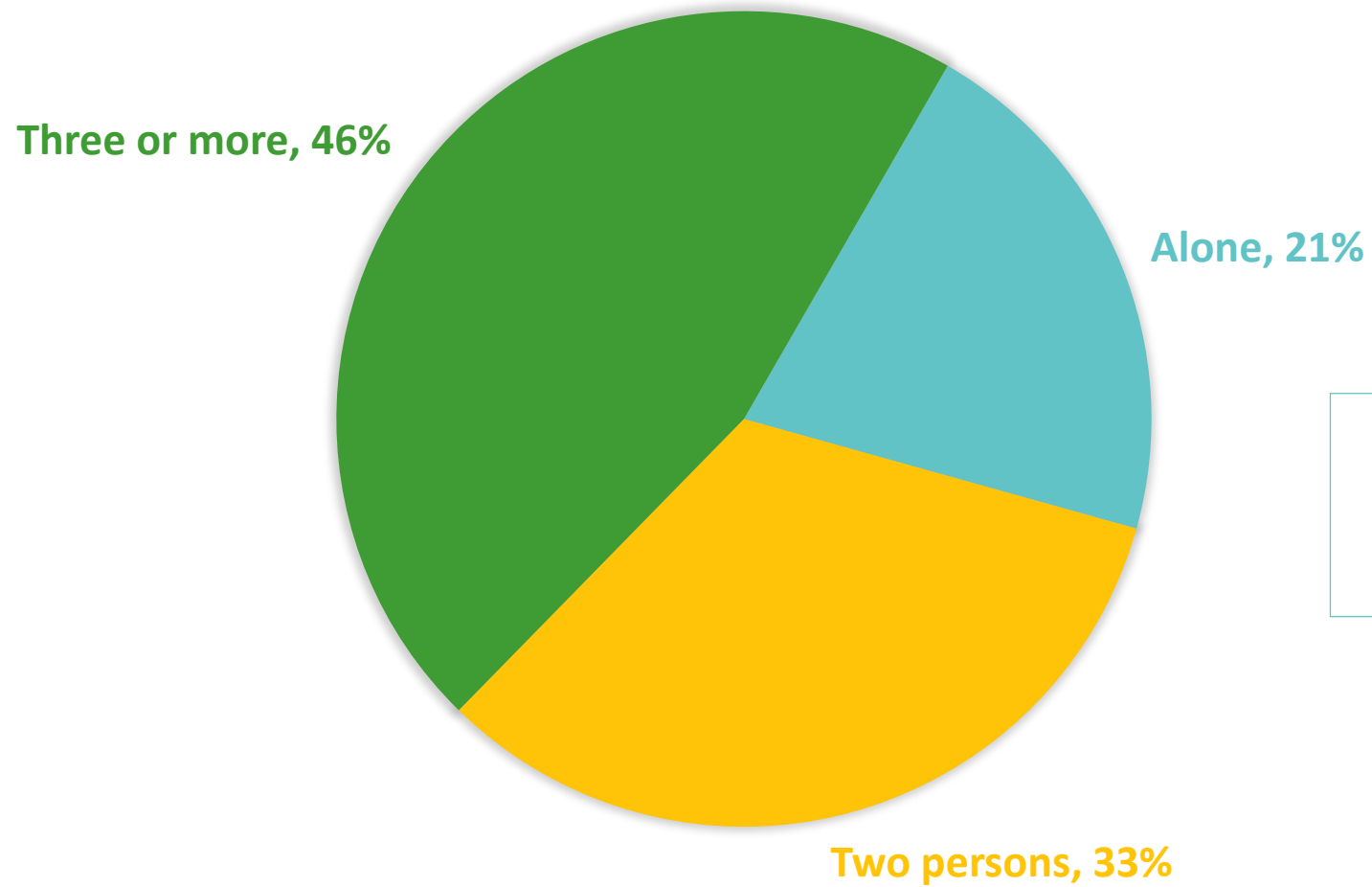
TRAVEL PARTY – TRACKING



TRAVEL PARTY – CHILD UNDER 18

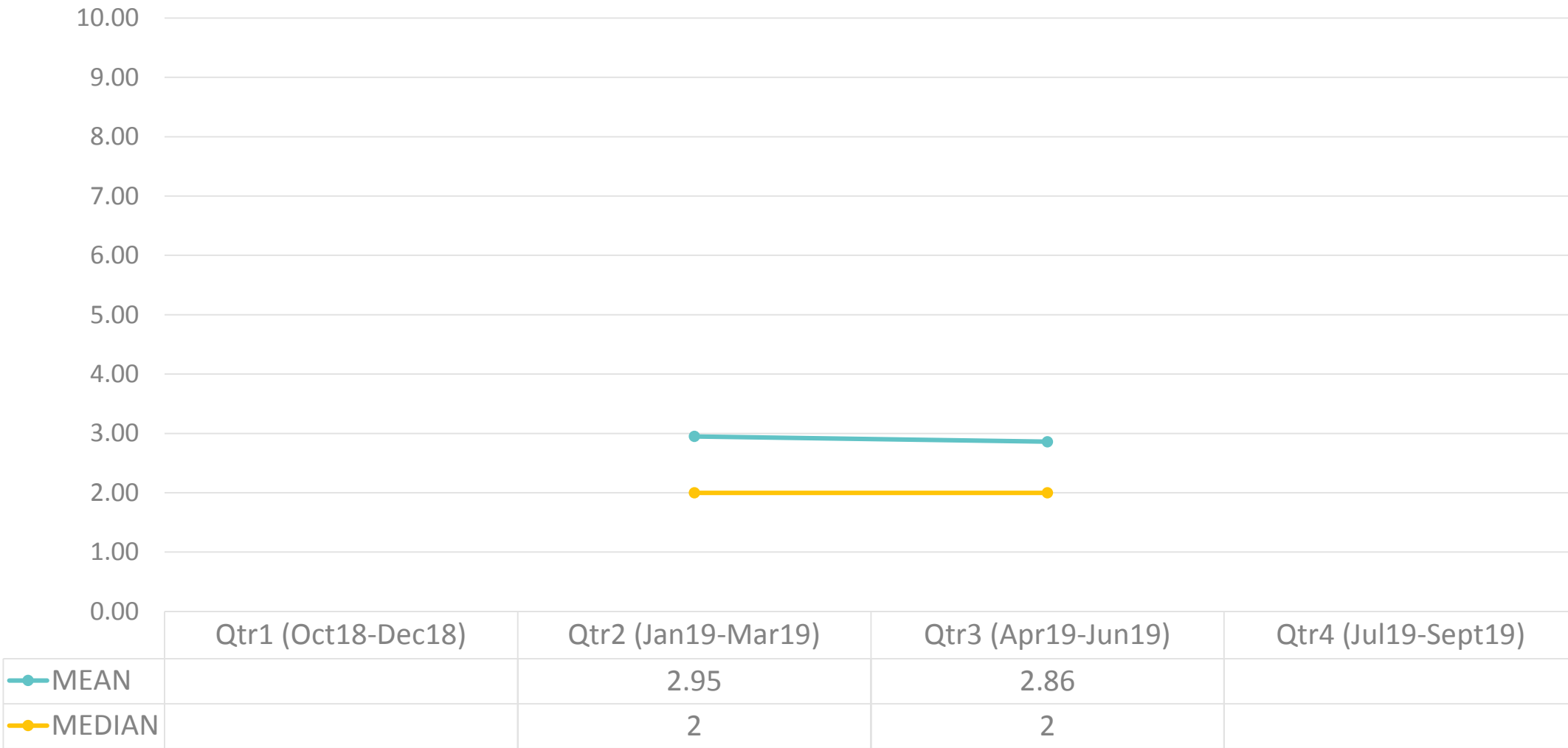


TRAVEL PARTY SIZE



Mean = 2.86
Median = 2

TRAVEL PARTY SIZE – TRACKING

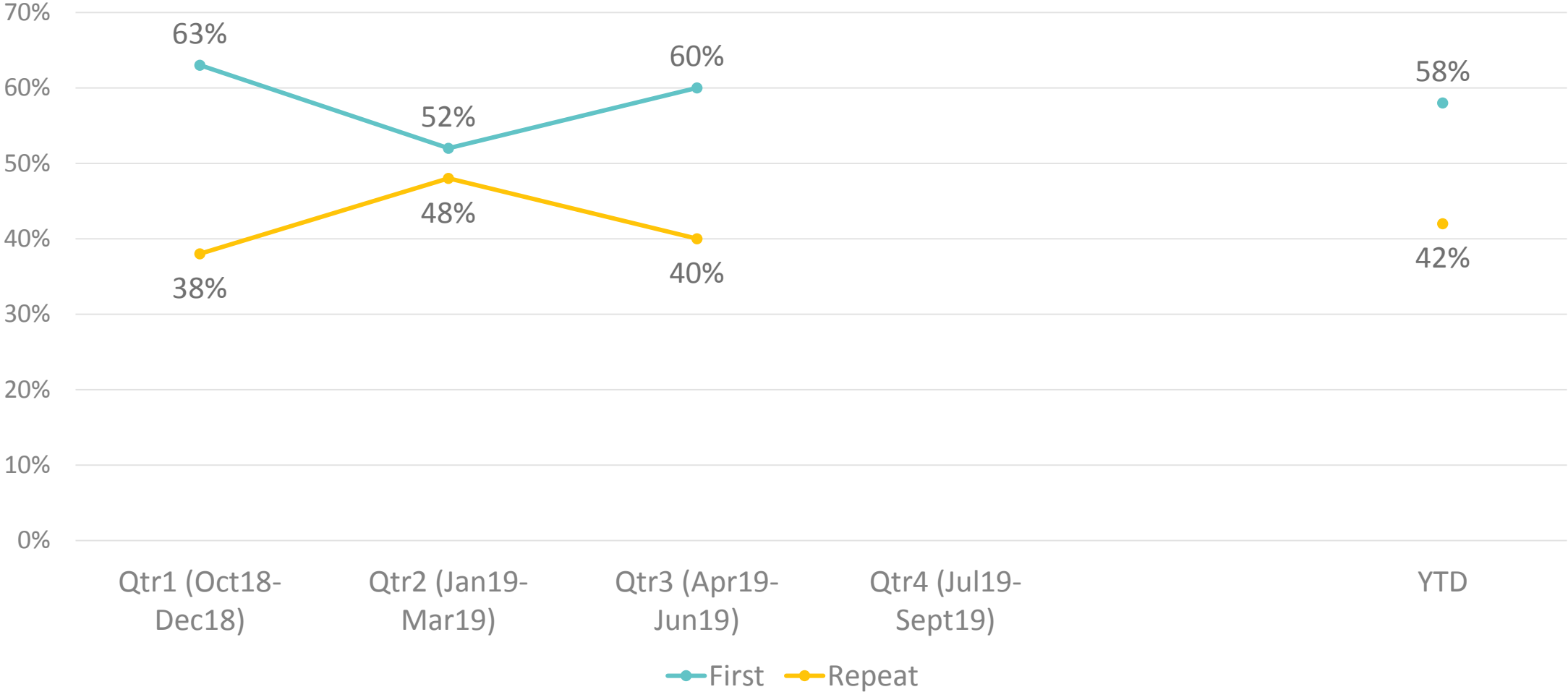


TRIPS TO GUAM



Mean = 2.51
Median = 1

TRIPS TO GUAM – TRACKING



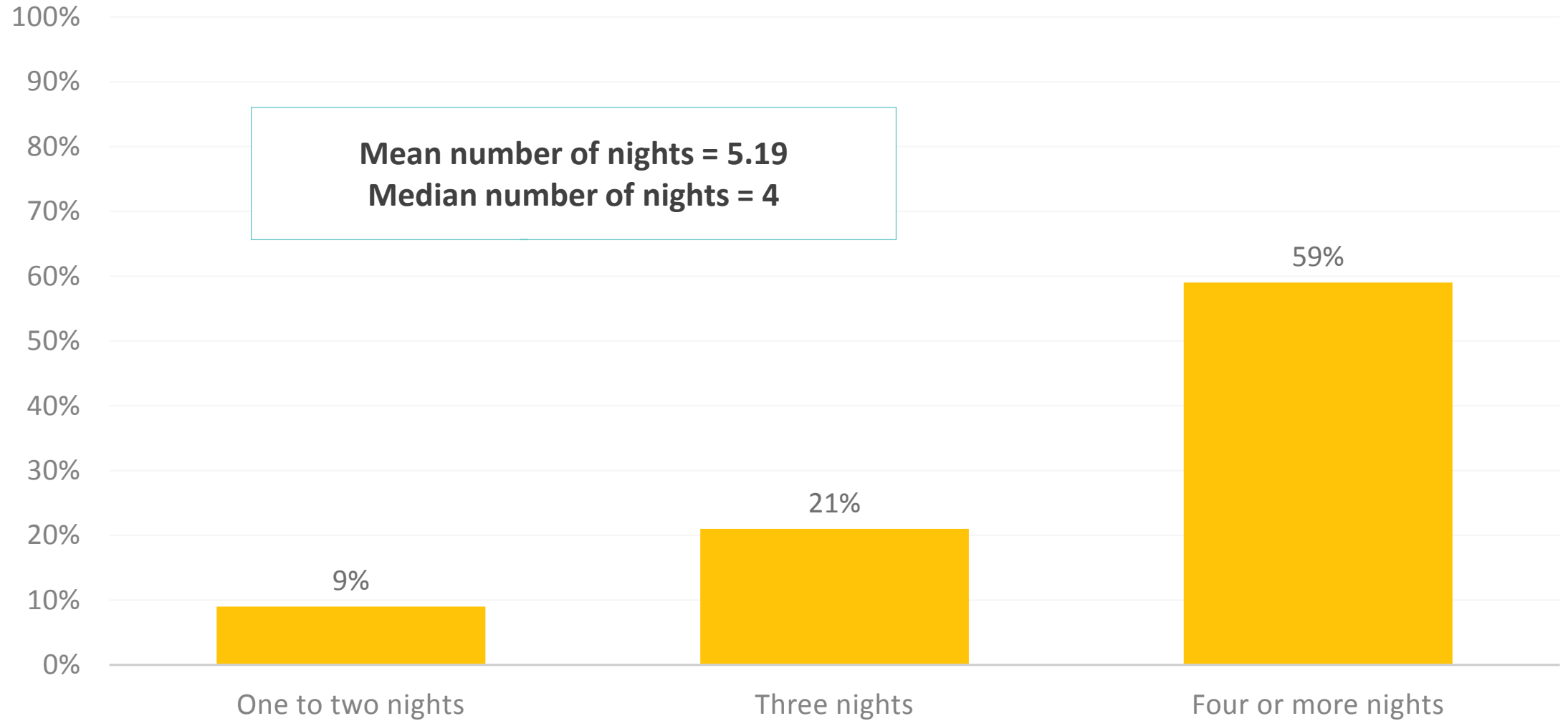
TRIPS TO GUAM – SEGMENTATION

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

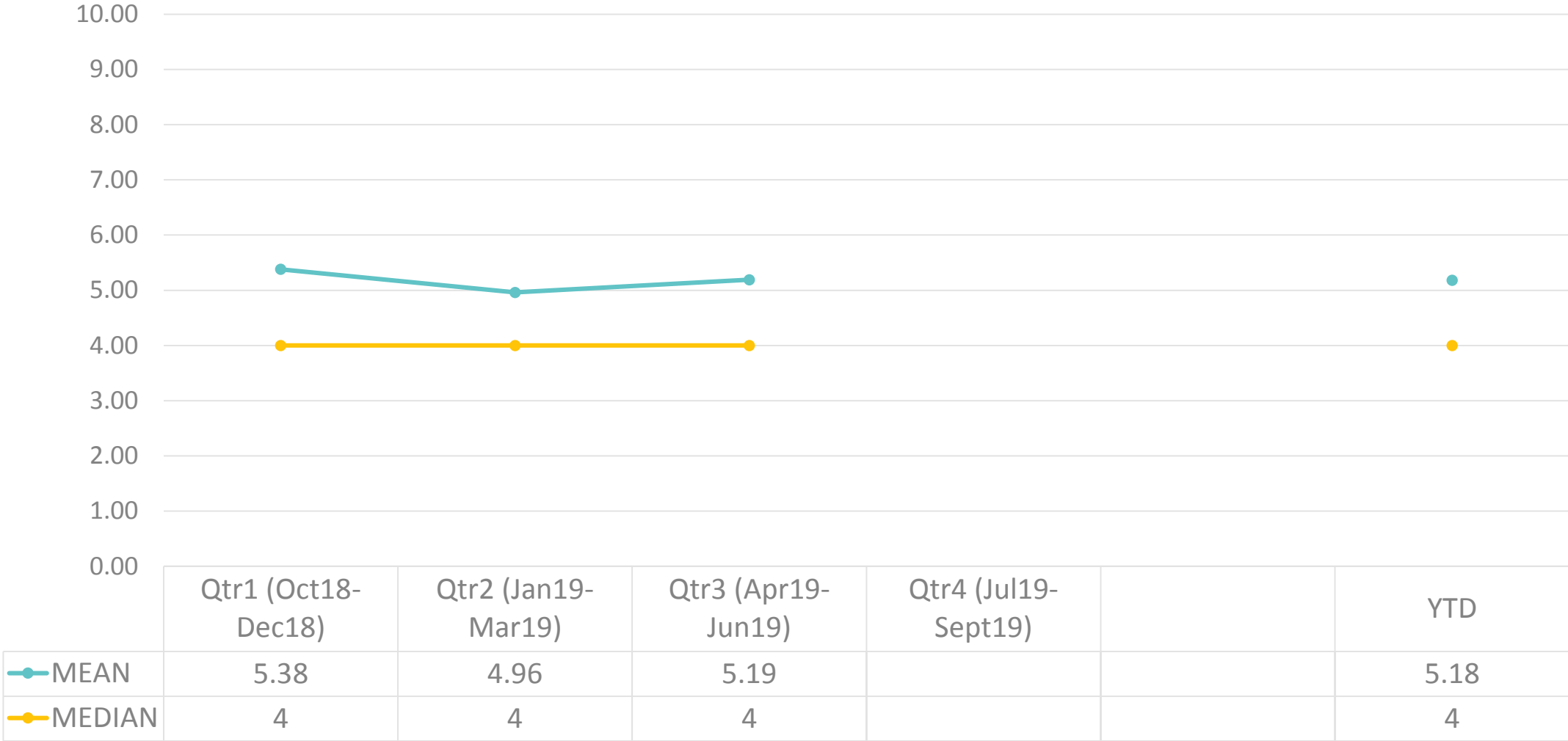
		TOTAL	FAMILY	FIT	MICE
		-	-	-	-
Q9	1st time	60%	63%	60%	
	Repeat	40%	37%	40%	100%
	Total	103	63	100	3
Q9	Mean	2.51	2.33	2.55	4.67
	Median	1	1	1	5

Prepared by Anthology Research

LENGTH OF STAY



LENGTH OF STAY – TRACKING



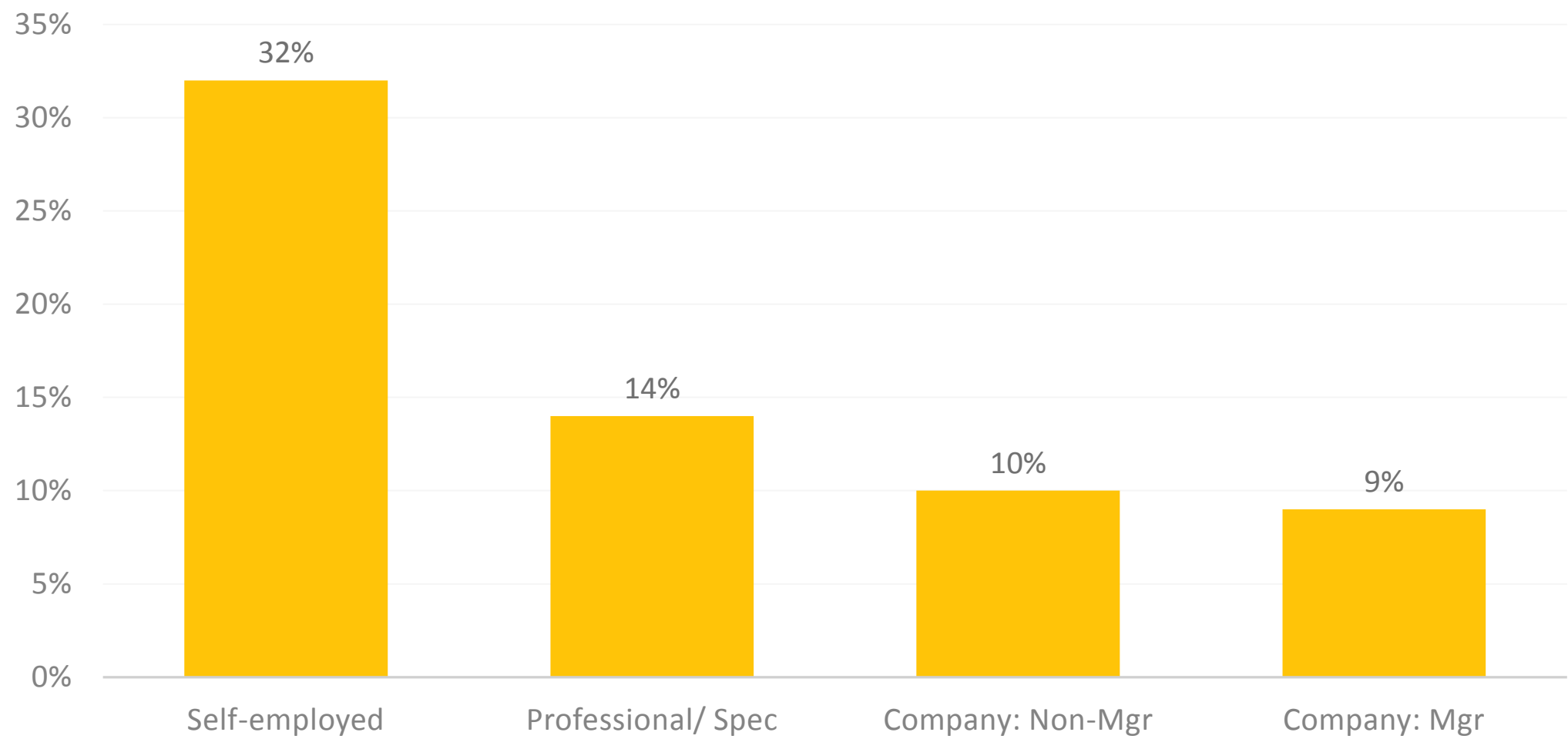
LENGTH OF STAY – SEGMENTATION

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

		TOTAL	FAMILY	FIT	MICE
		-	-	-	-
SA	1-2 nights	19%	19%	20%	100%
	3 nights	21%	25%	21%	
	4+	59%	56%	59%	
	Total	103	63	100	
SA	Mean	5.19	4.59	5.23	6.00
	Median	4	4	4	6

Prepared by Anthology Research

OCCUPATION – Top Responses (10%+)



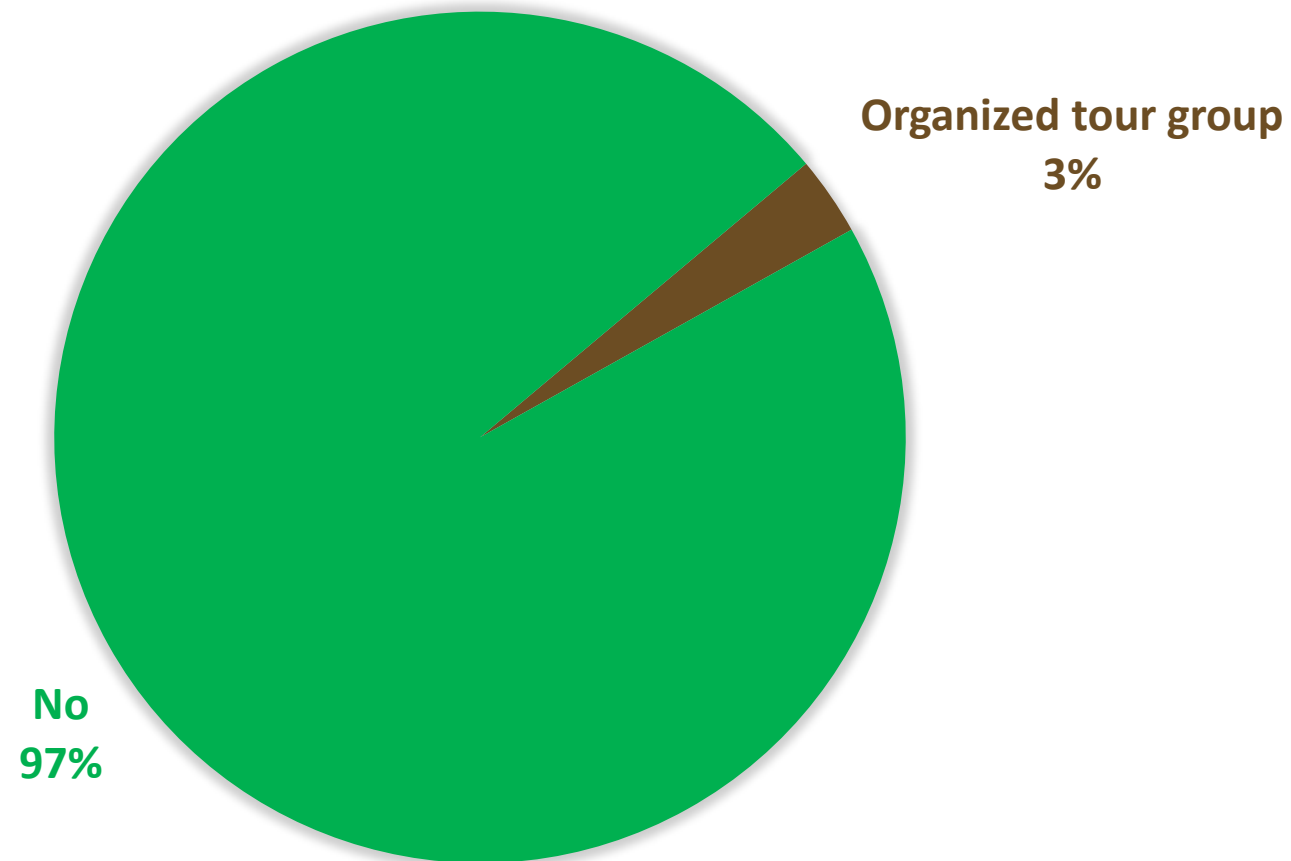


SECTION 2

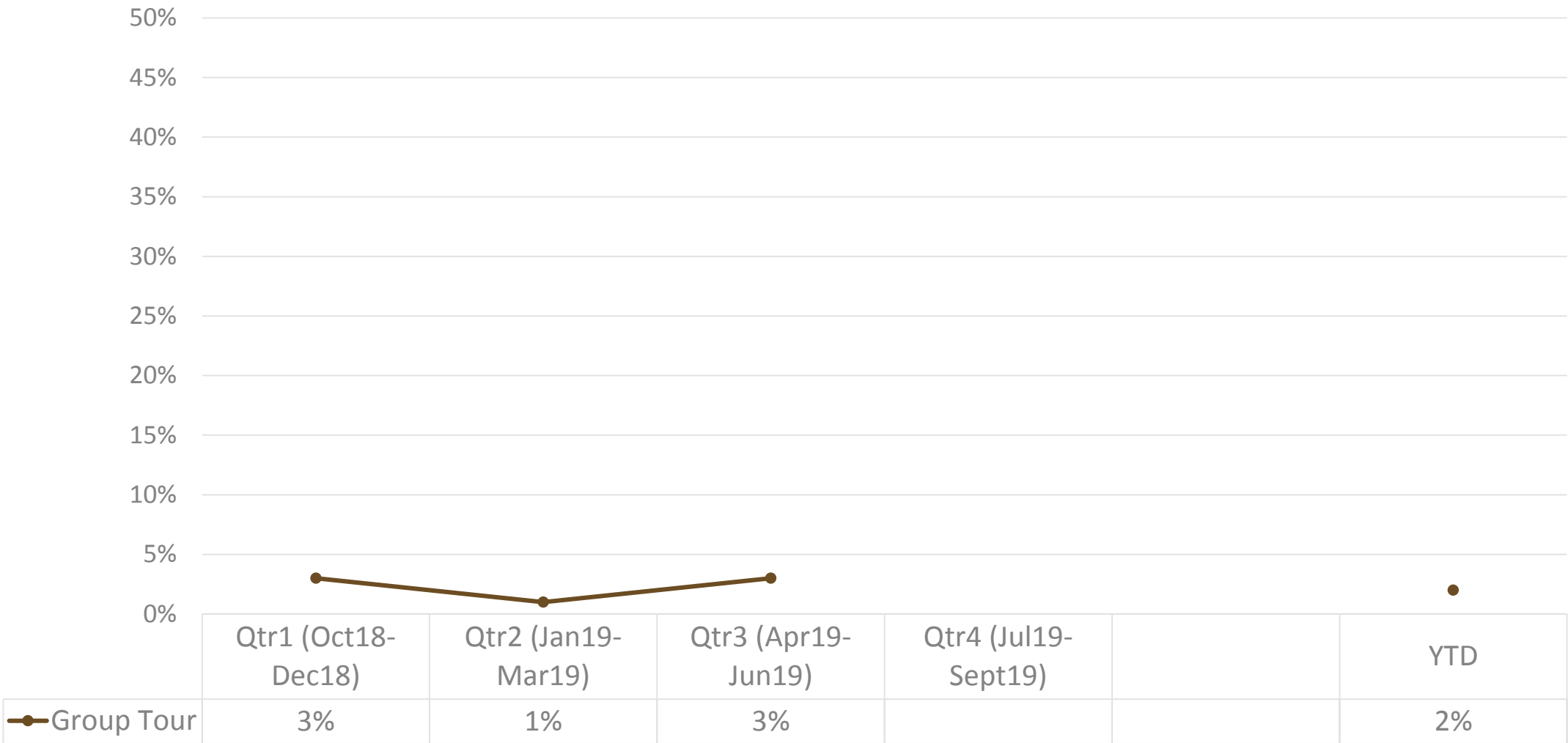
TRAVEL PLANNING



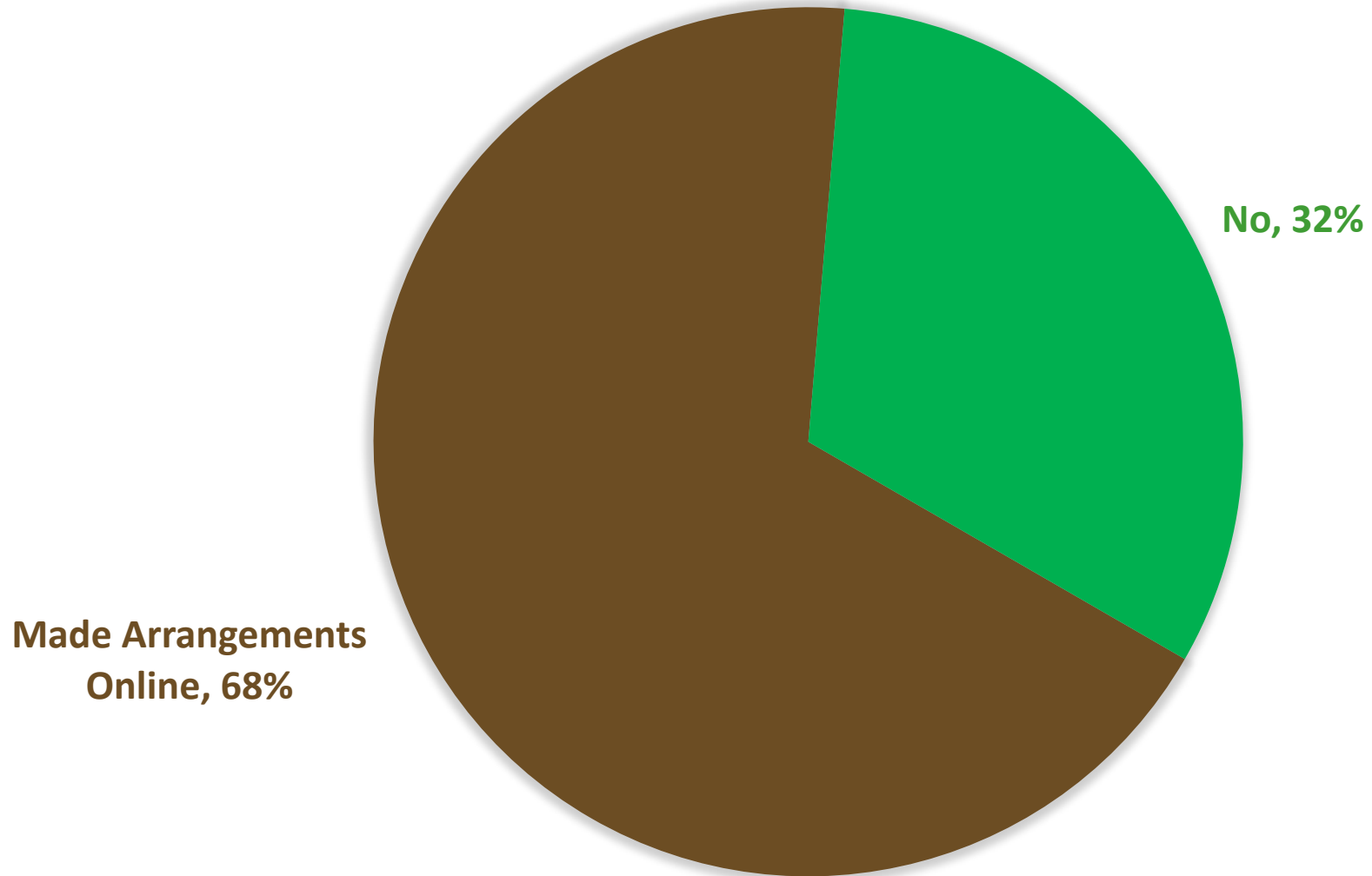
ORGANIZED TOUR GROUP



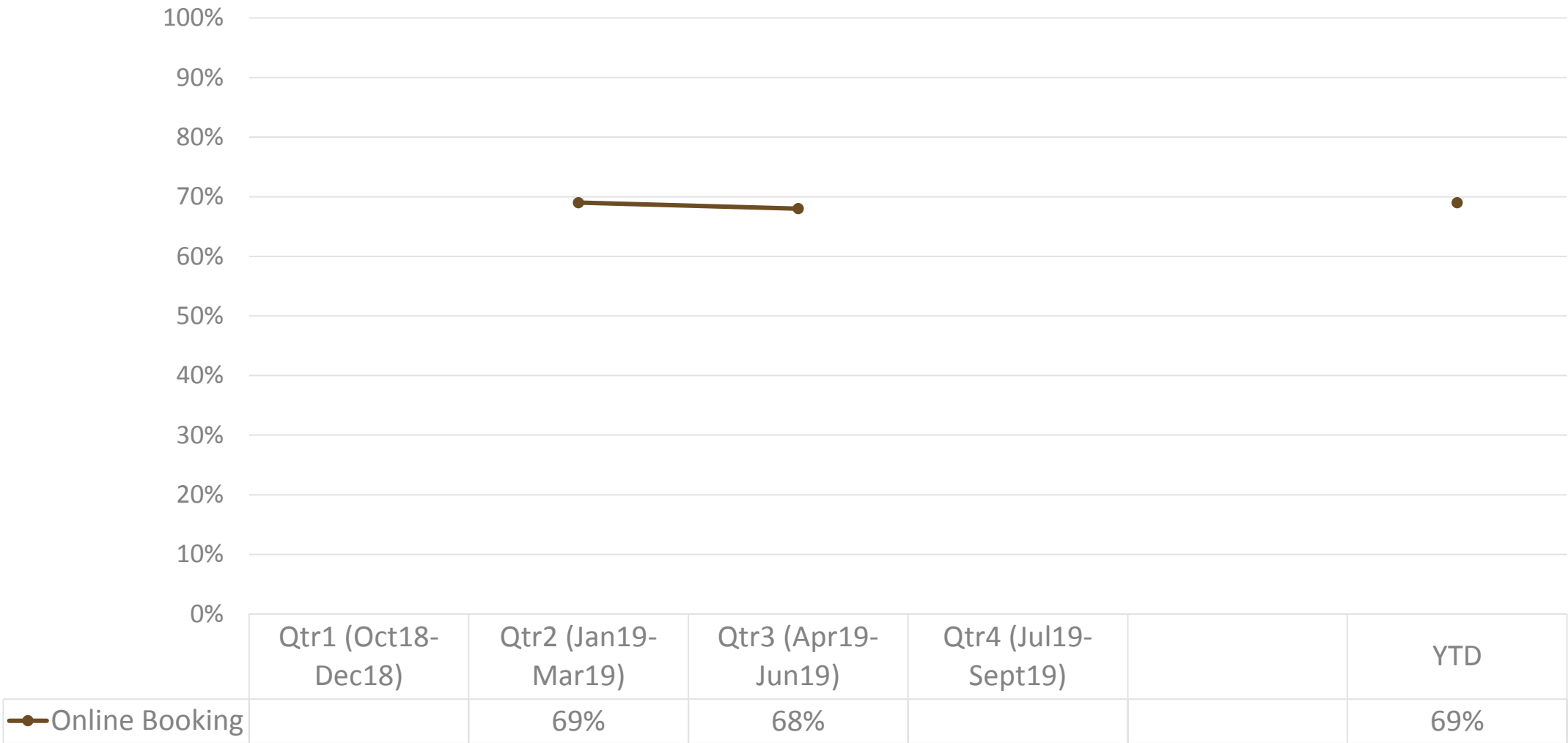
ORGANIZED TOUR GROUP – TRACKING



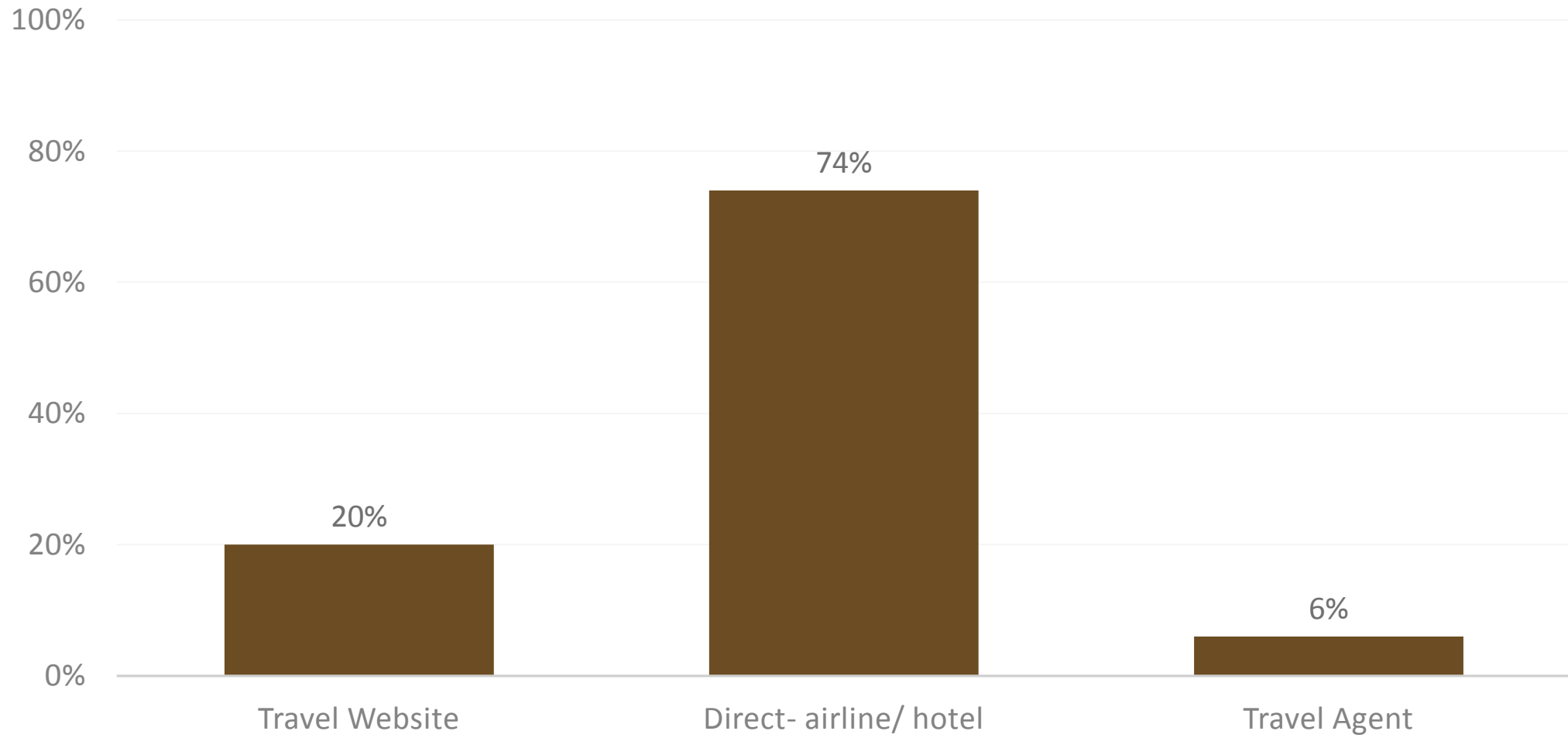
ONLINE BOOKING



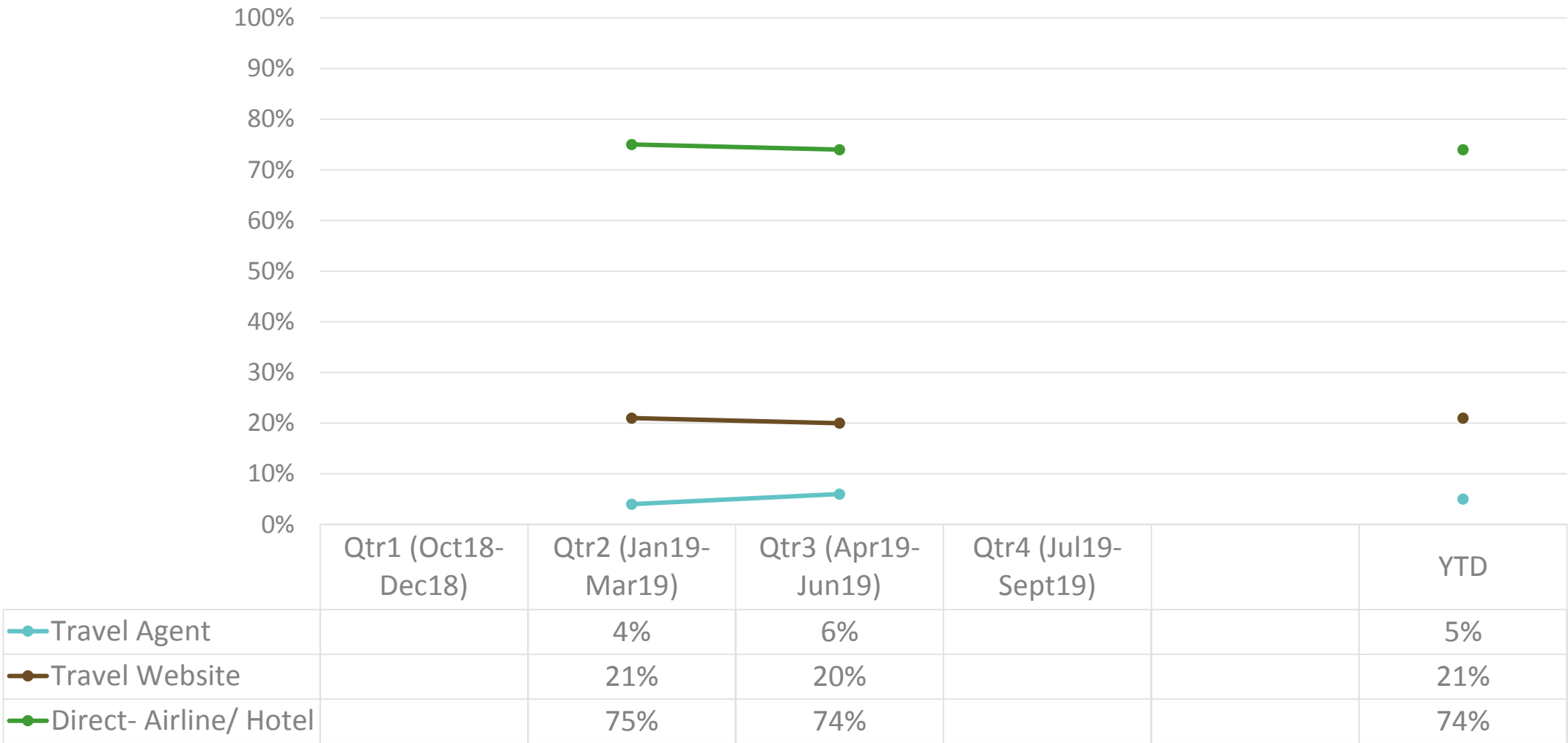
ONLINE BOOKING – TRACKING



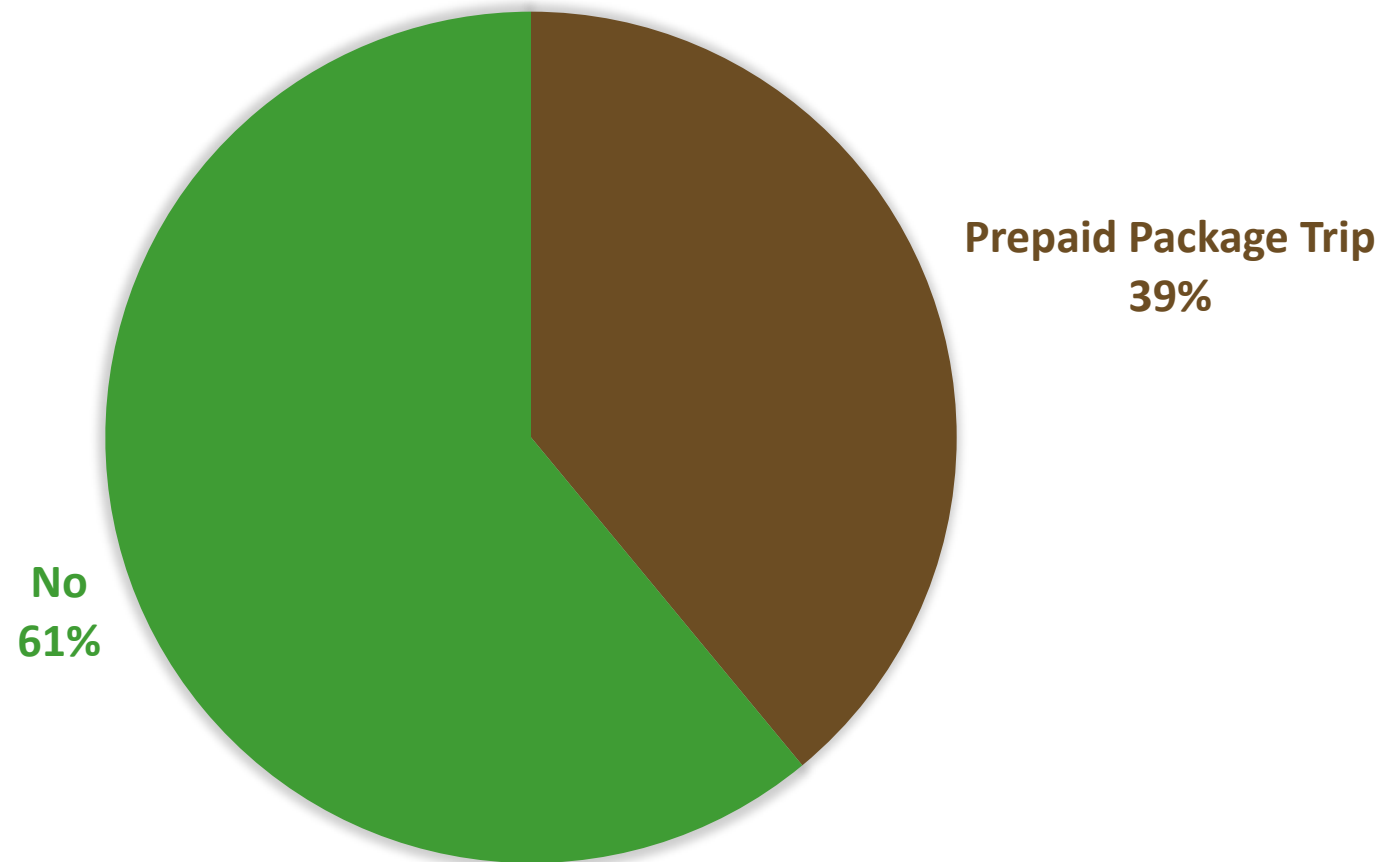
TRAVEL ARRANGEMENTS



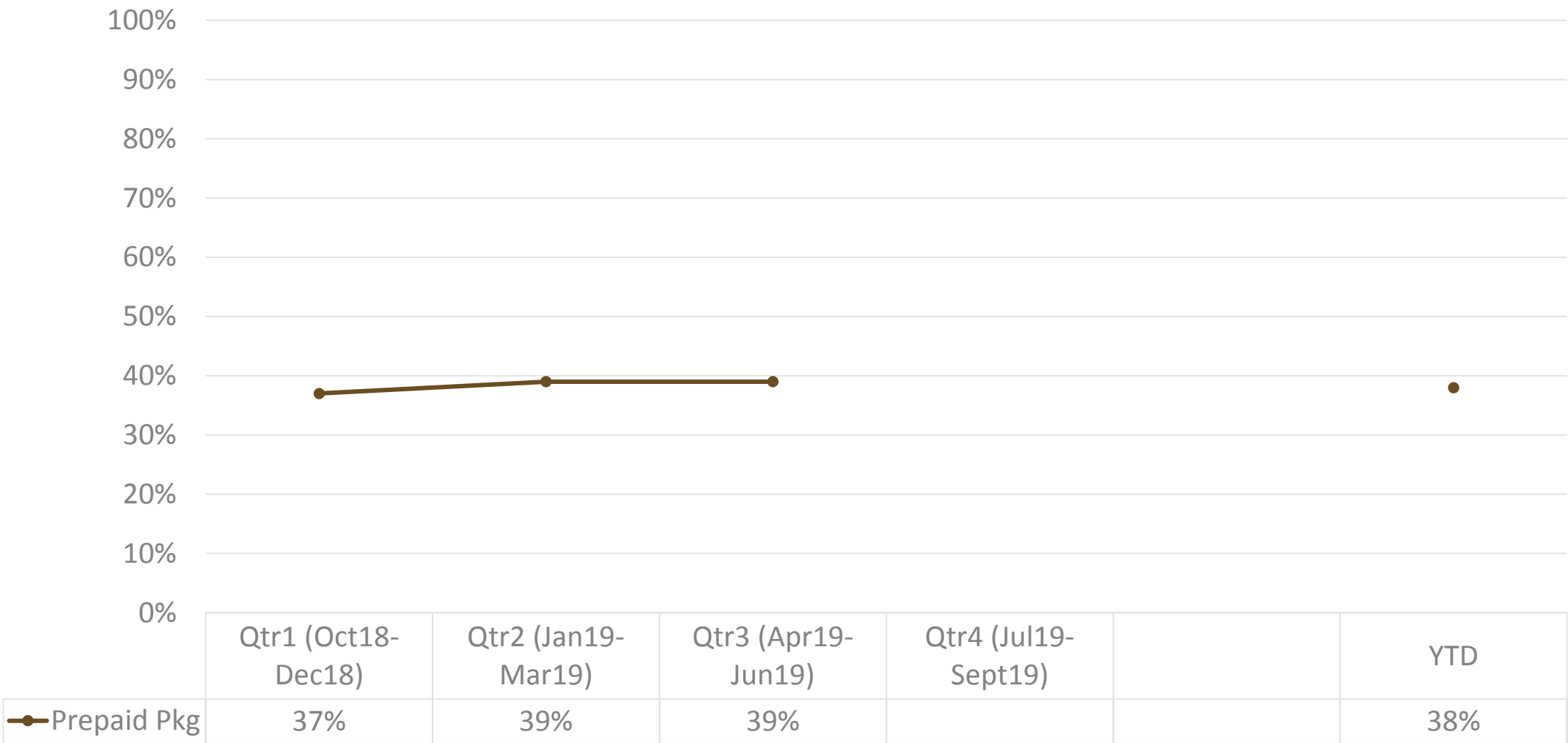
TRAVEL ARRANGEMENTS – TRACKING



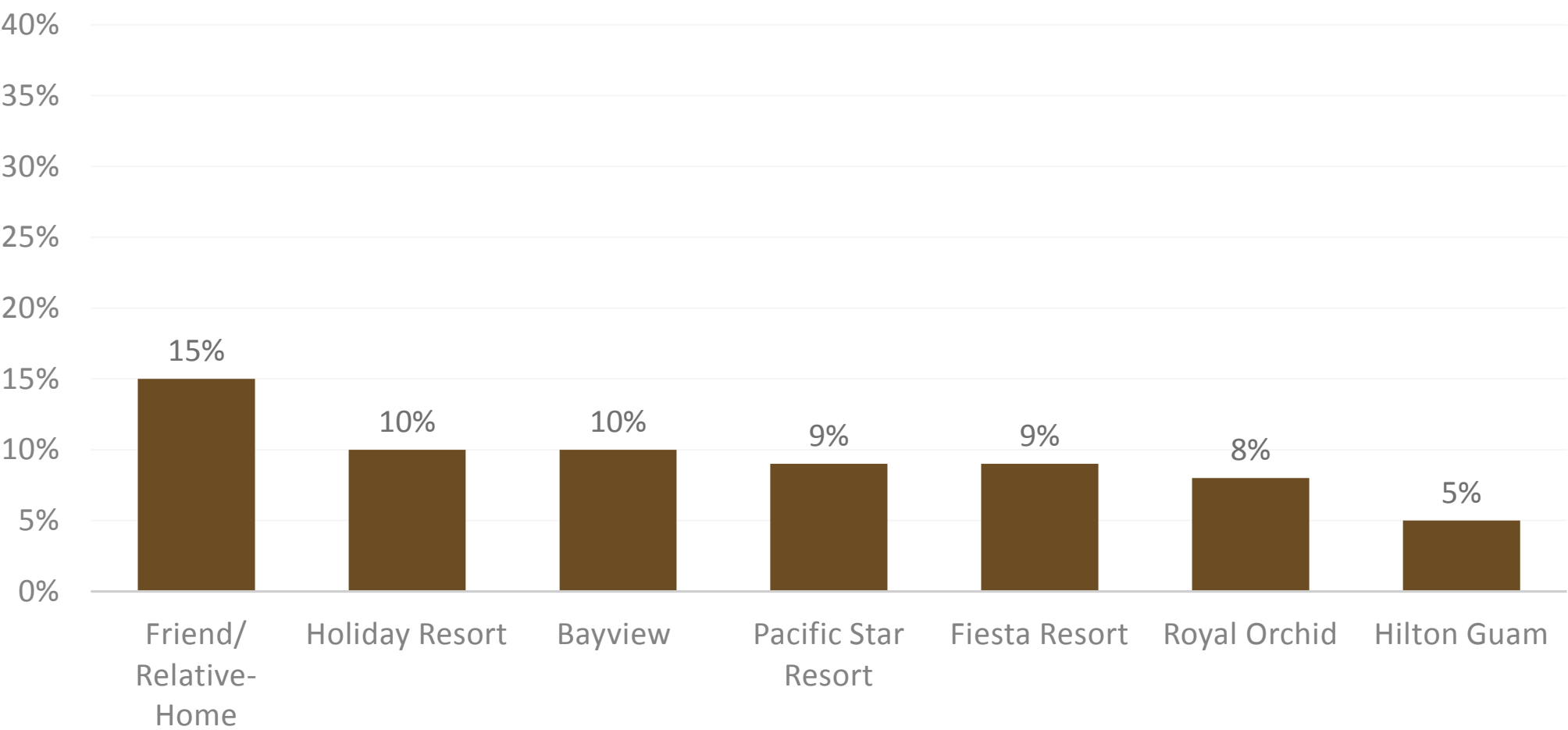
PREPAID PACKAGE TRIP



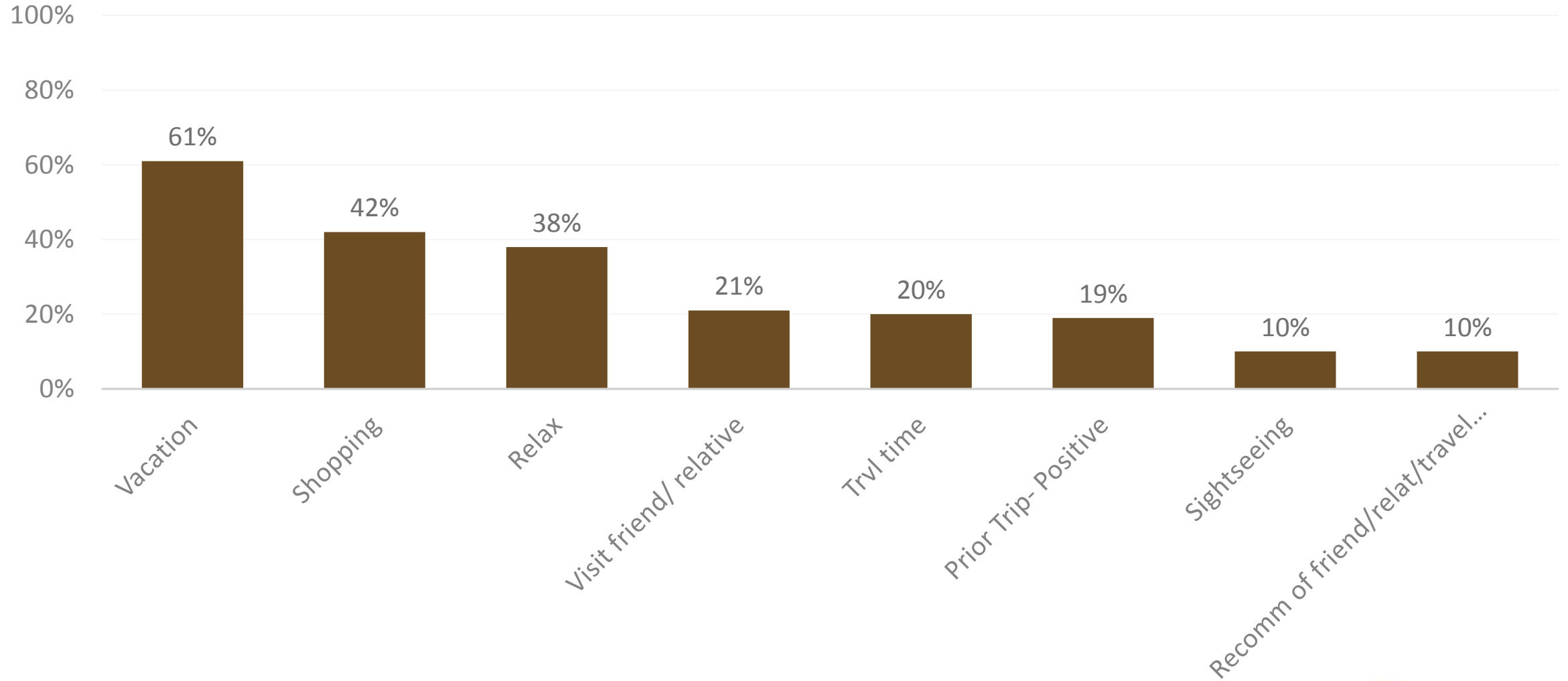
PREPAID PACKAGE TRIP



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	FAMILY	FIT	MICE
	-	-	-	-
Q8 Vacation	61%	67%	61%	33%
Shopping	42%	41%	41%	33%
Just to relax	38%	35%	38%	
To visit friends or relatives	21%	19%	21%	
Short travel time (not too far from home)	20%	21%	21%	
A previous visit	19%	21%	20%	67%
Recommendation of friend/ relative/ travel agency	10%	8%	8%	
Sightseeing/ visiting tourist spots	10%	11%	10%	
Beautiful seas, beaches, tropical climate	8%	5%	8%	33%
Adventure	7%	6%	7%	
Price of the tour package	5%	5%	5%	
Scuba diving	4%	3%	4%	
Water sports (snorkeling, windsurfing, parasailing)	4%	3%	4%	
Convention/ conference/ trade show/ meeting	3%	5%	3%	100%
It is a safe place to spend a vacation	3%	3%	2%	
Career certification/ testing	2%	2%	2%	
Honeymoon	2%	3%	2%	
To golf	1%		1%	
Company/ business trip	1%		1%	
Organized sporting activity/ event	1%	2%	1%	
Government or military	1%	2%	1%	
Shop Guam e-Festival	1%	2%	1%	
Total	103	63	100	3

Prepared by Anthology Research



SECTION 3

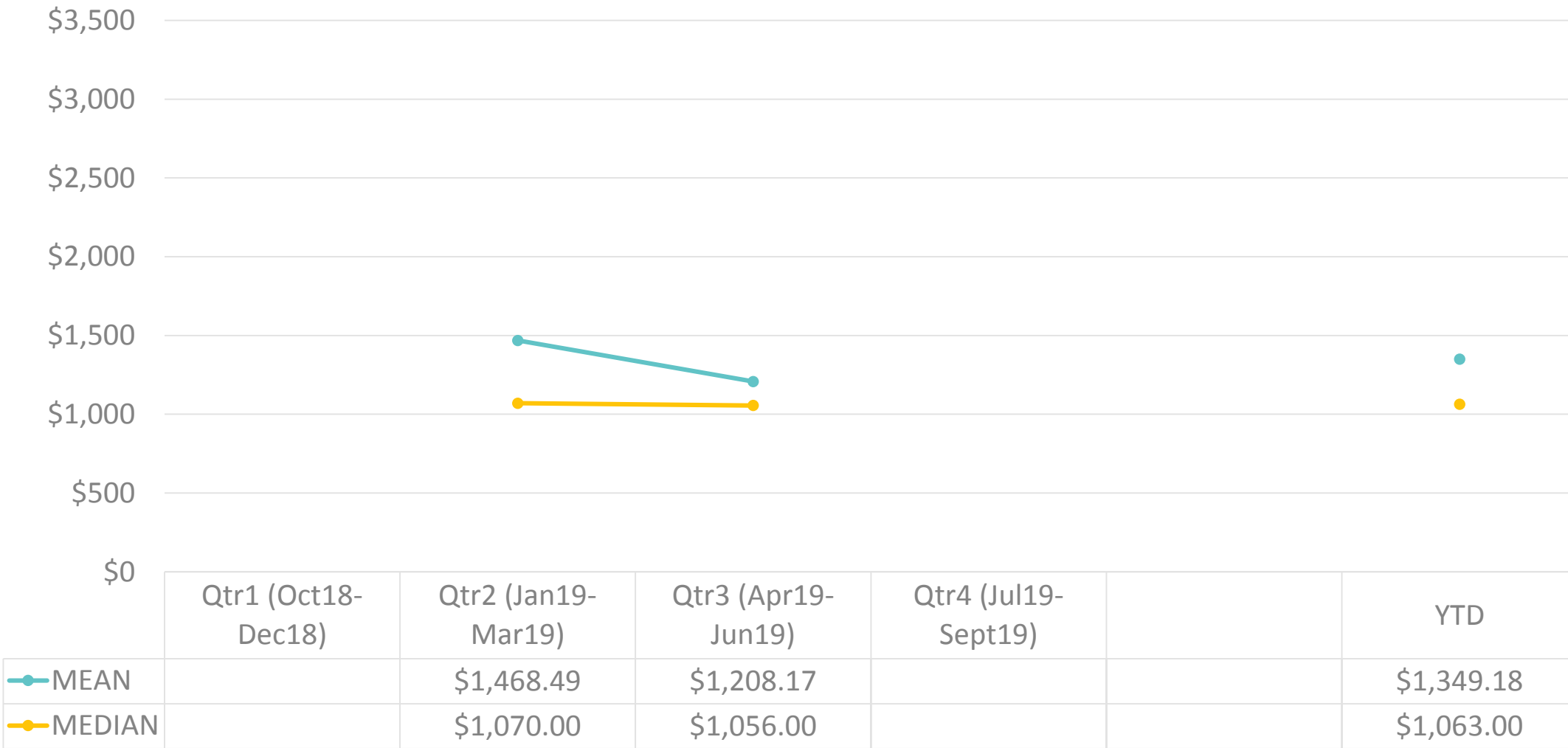
EXPENDITURES



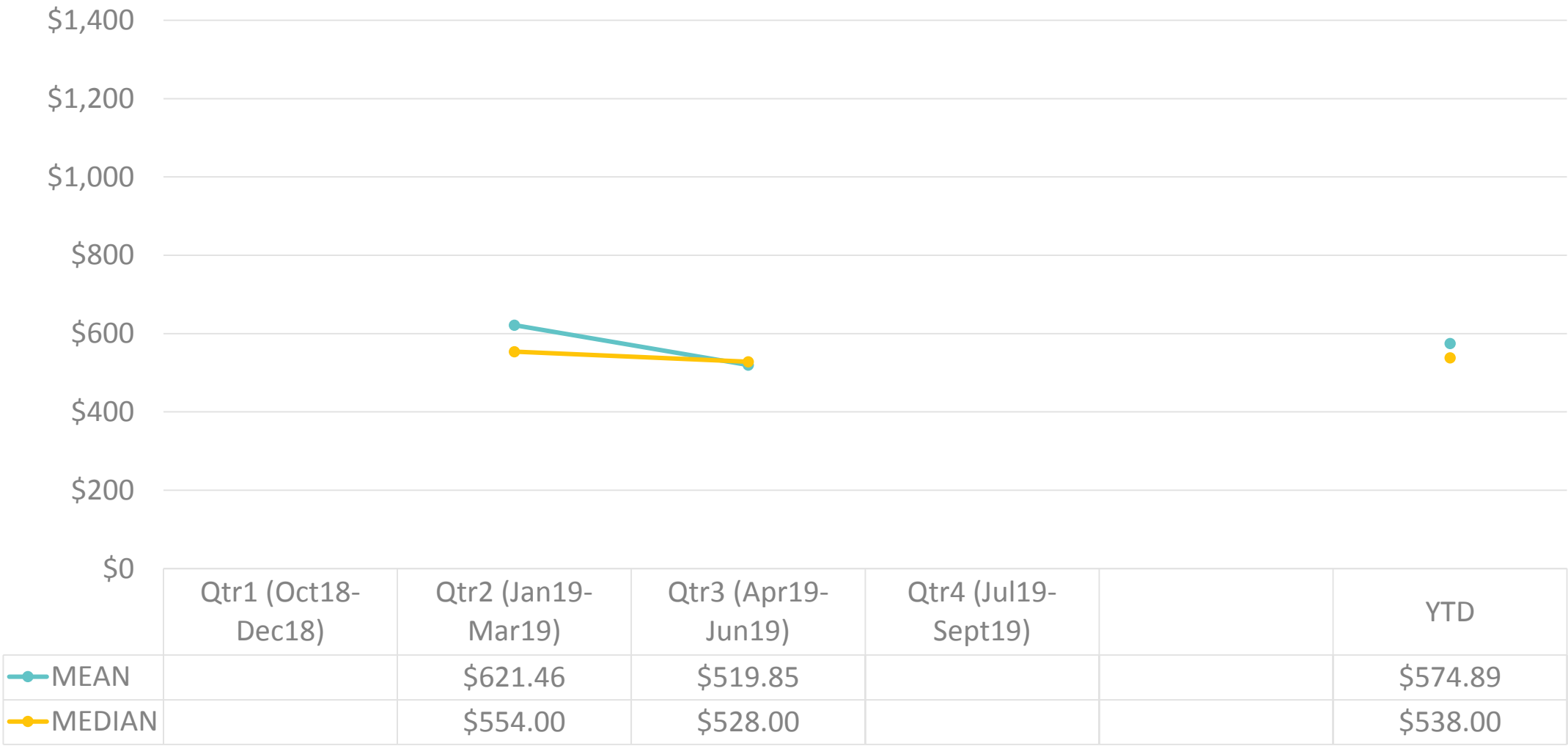
PREPAID PACKAGE EXPENDITURES

- \$1,208.17 = overall mean average prepaid package expense (for entire travel party) by respondent
- \$519.85 = overall mean average **per person** prepaid package expenditures

PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING



PREPAID PACKAGE – PER PERSON EXPENSE TRACKING



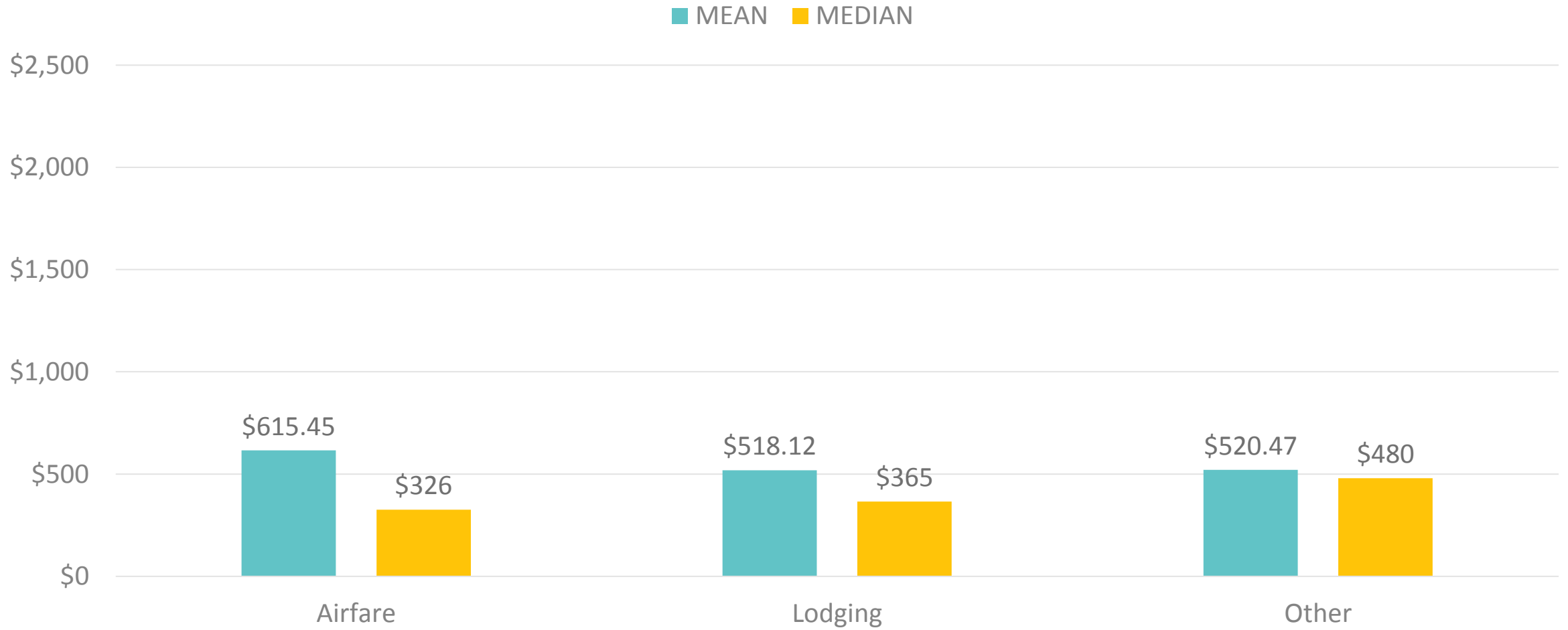
PREPAID PACKAGE – PER PERSON EXPENSE SEGMENTATION

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

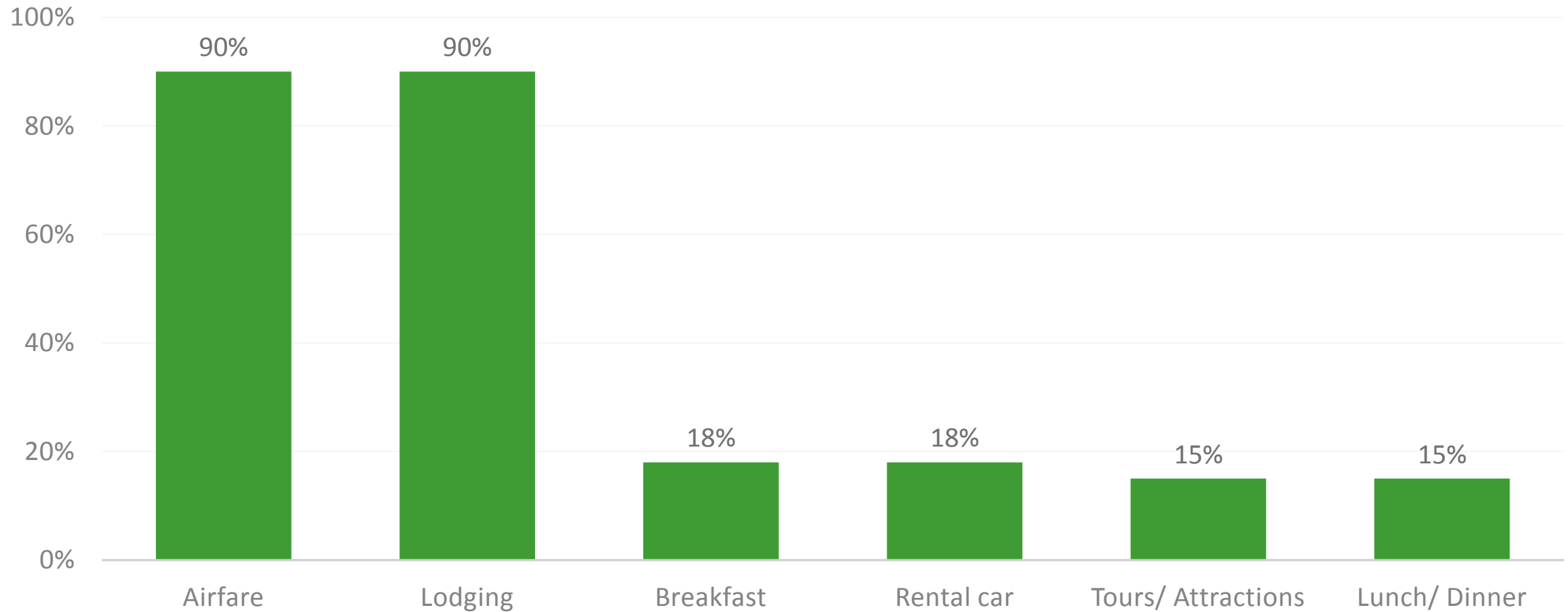
		TOTAL	FAMILY	FIT	MICE	LEISURE
		-	-	-	-	-
PREPAID PKG PER PERSON	Mean	\$519.85	\$503.42	\$519.85	.	\$542.57
	Median	\$528	\$538	\$528	.	\$547

Prepared by Anthology Research

PREPAID PACKAGE – BREAKDOWN



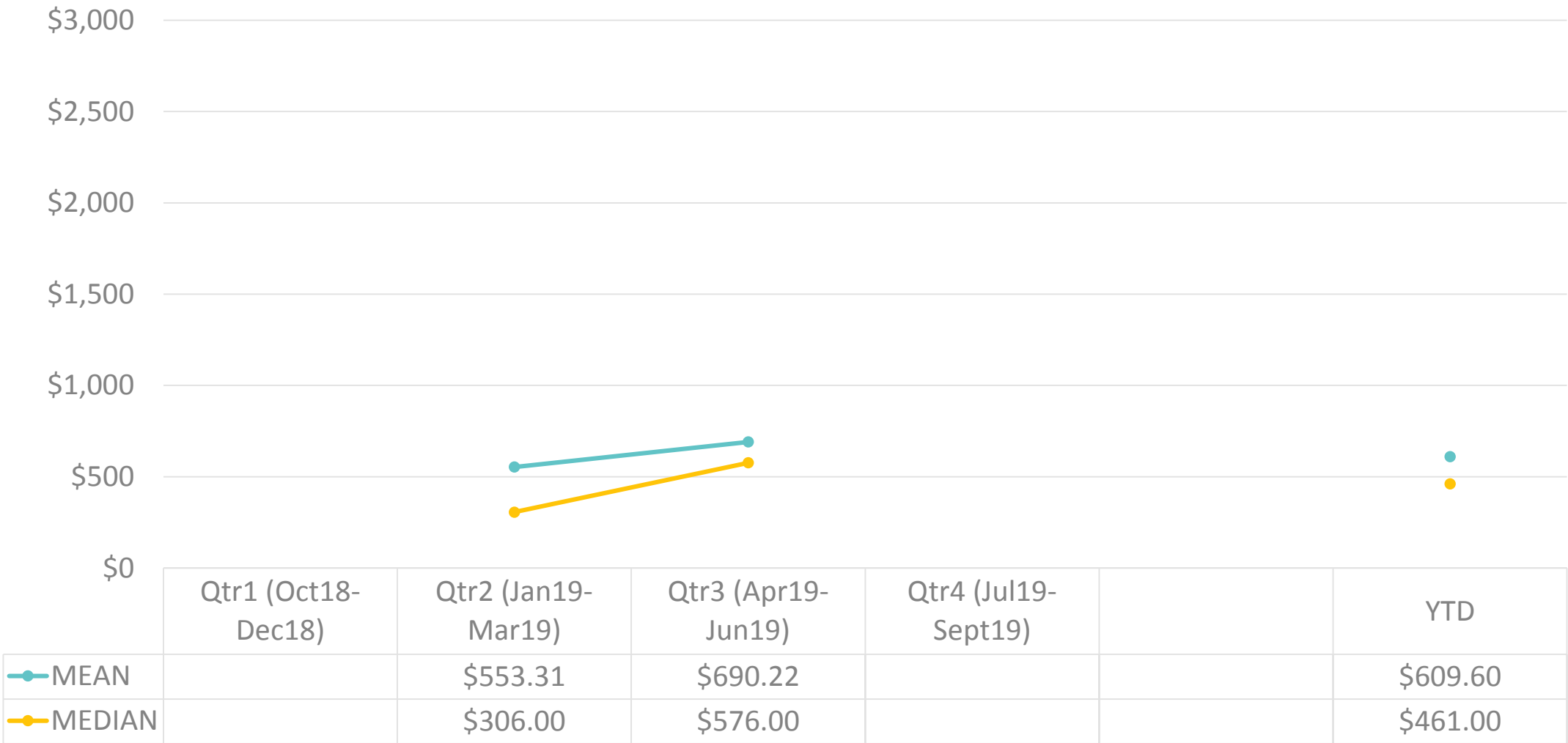
PREPAID PACKAGE – BREAKDOWN



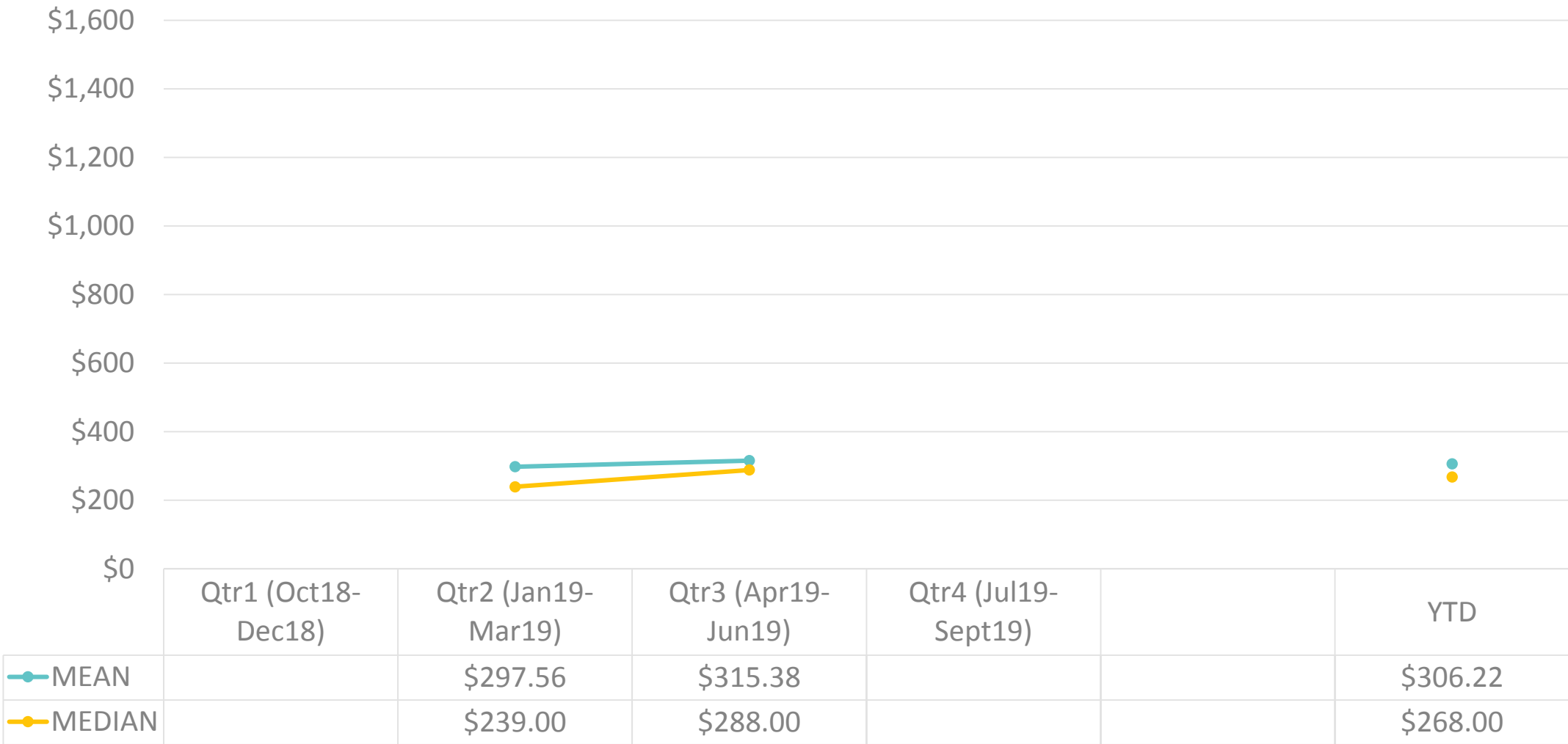
AIRFARE – FIT TRAVELER

- \$690.22 = overall mean average airfare expense (for entire travel party) by respondent
- \$315.38 = overall mean average **per person** airfare expenditures

AIRFARE – FIT TRAVELER (GROUP) TRACKING



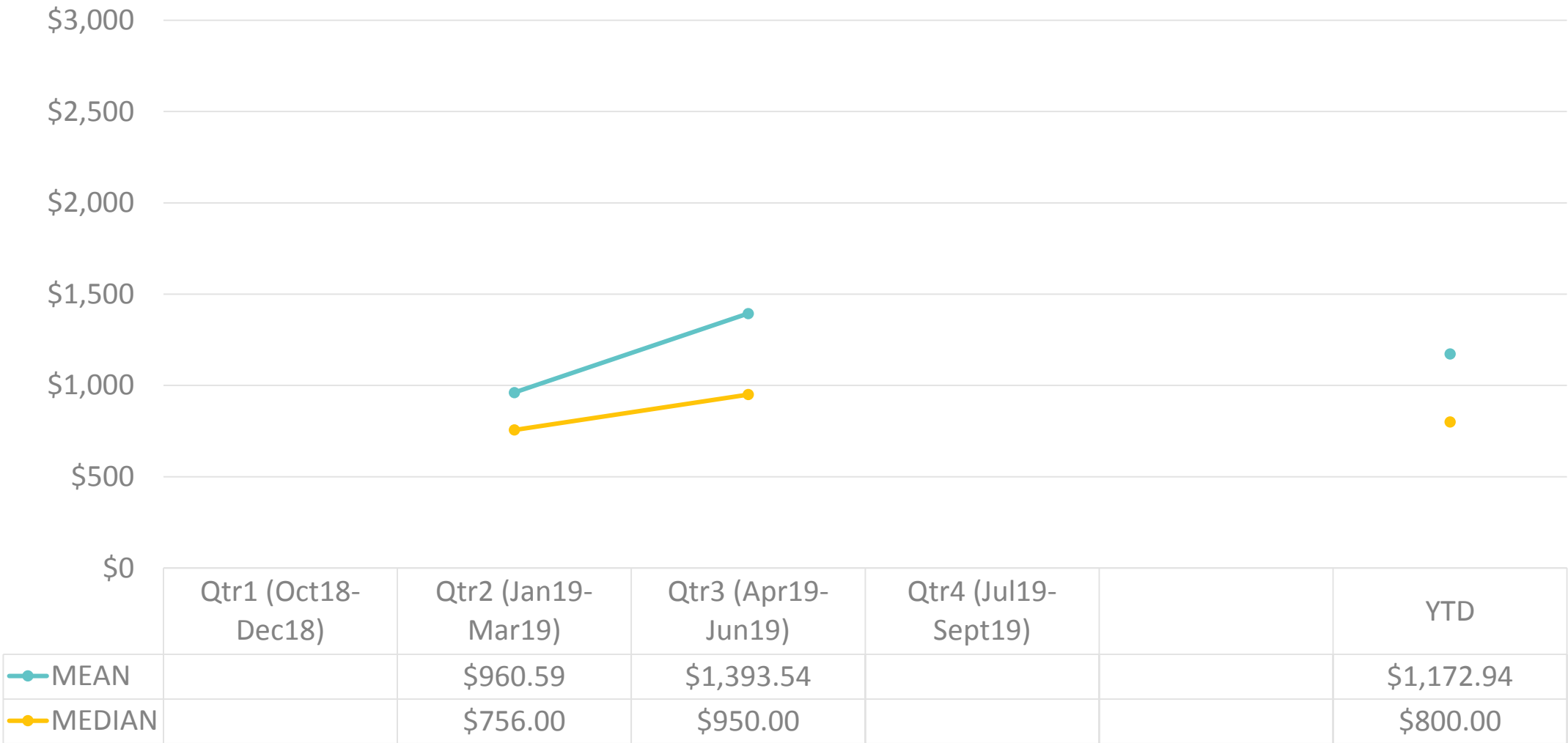
AIRFARE – FIT TRAVELER (Per Person) TRACKING



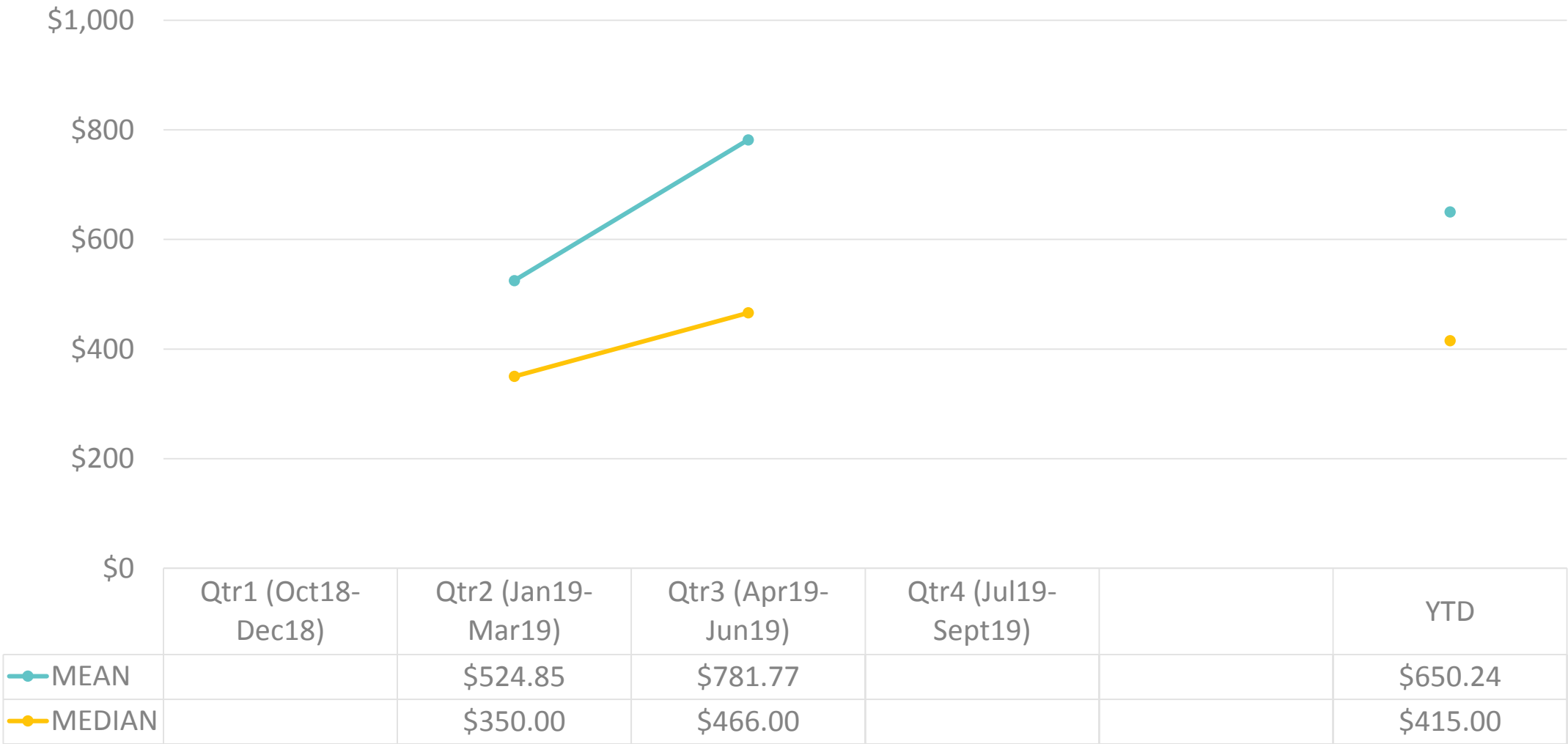
ONISLE EXPENDITURES

- \$1,393.54 = overall mean average expense (for entire travel party) by respondent
- \$781.77 = overall mean average **per person** expenditures

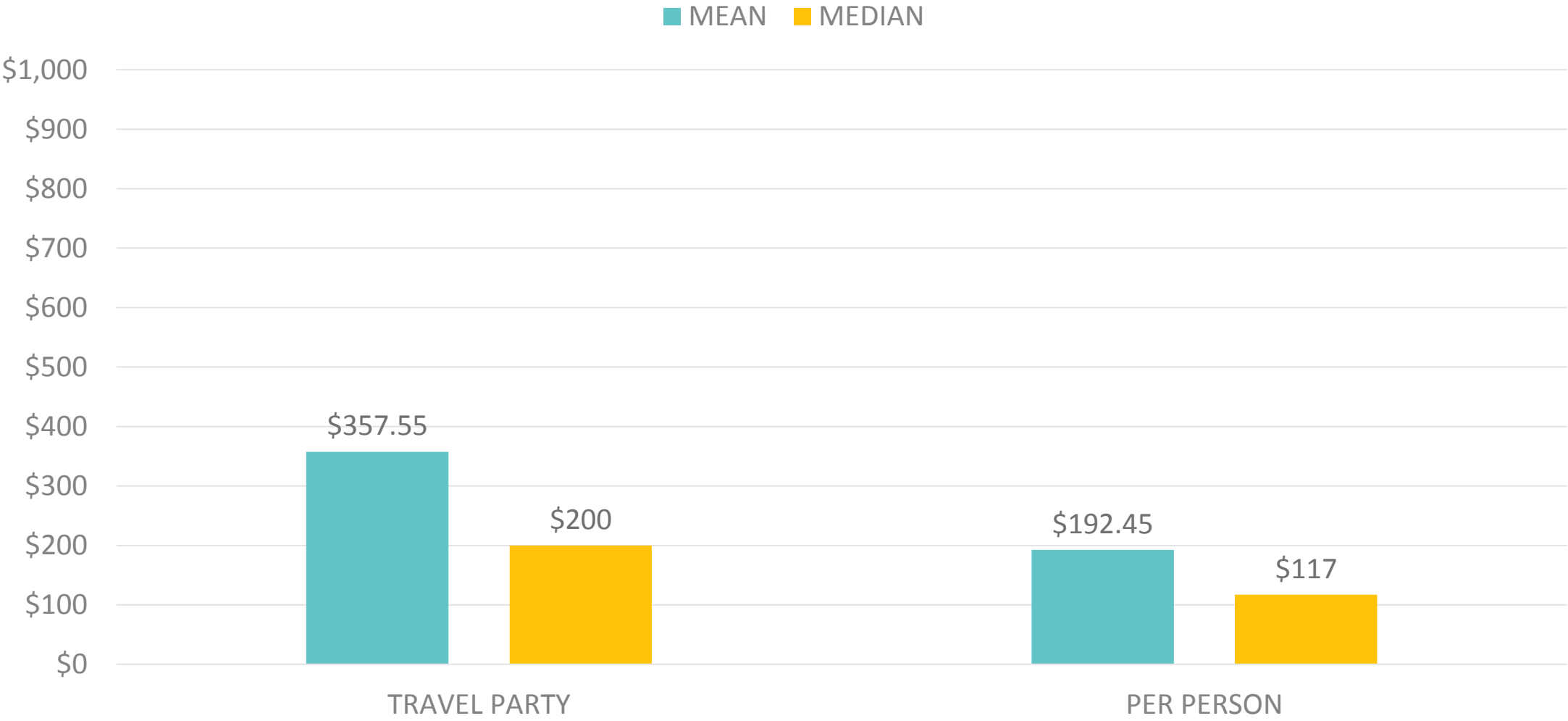
ONISLE – TRAVEL PARTY TRACKING



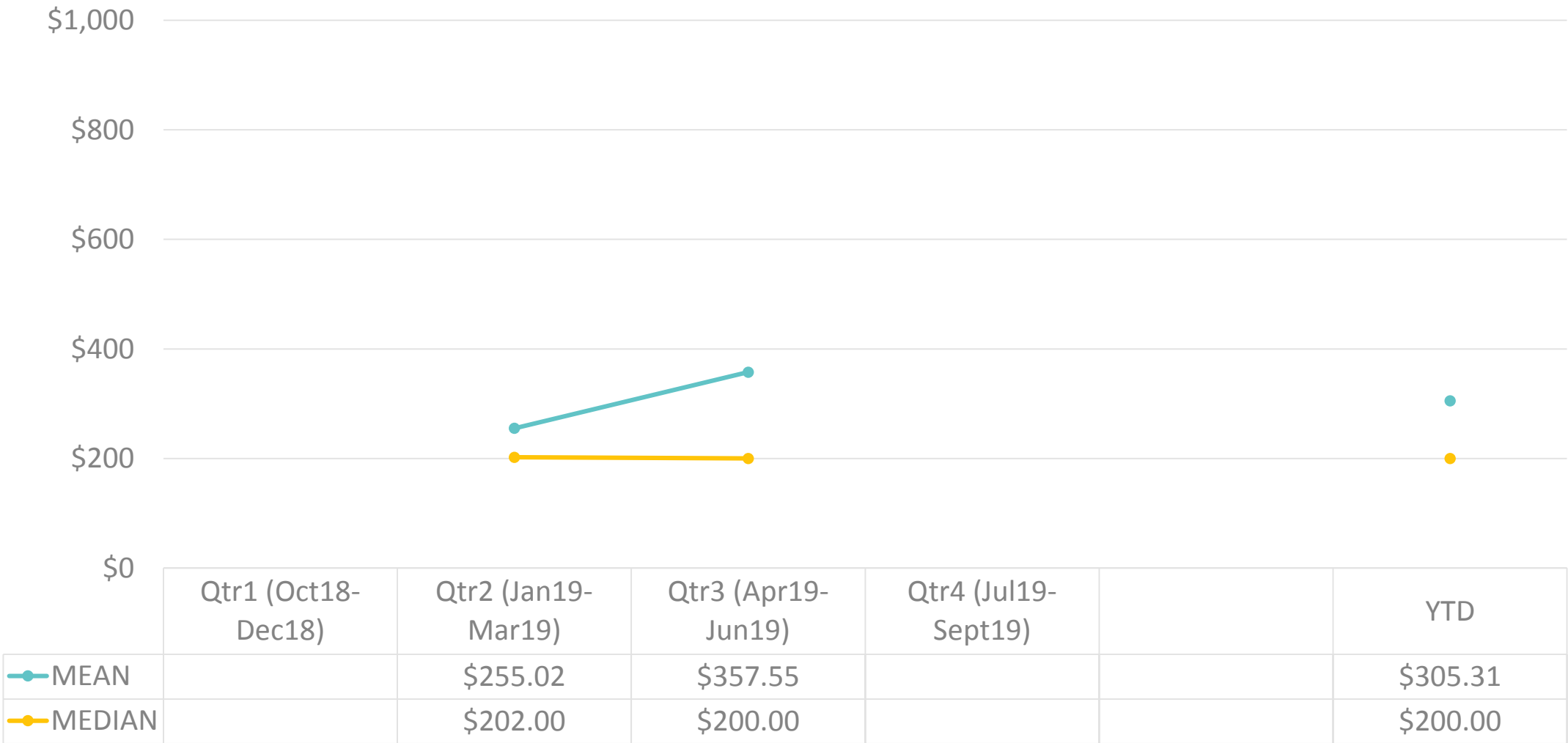
ONISLE – PER PERSON TRACKING



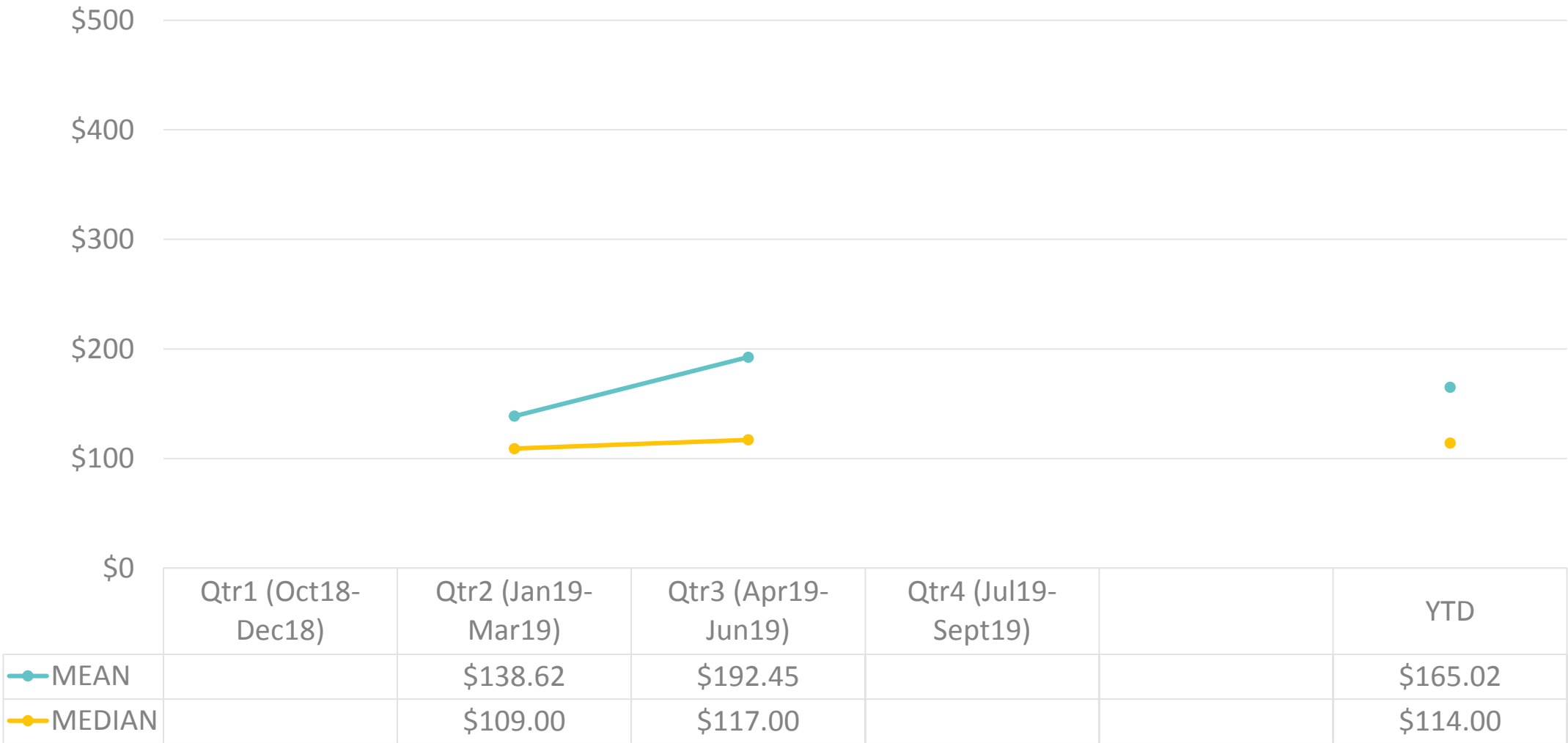
ONISLE – PER DAY SPENDING



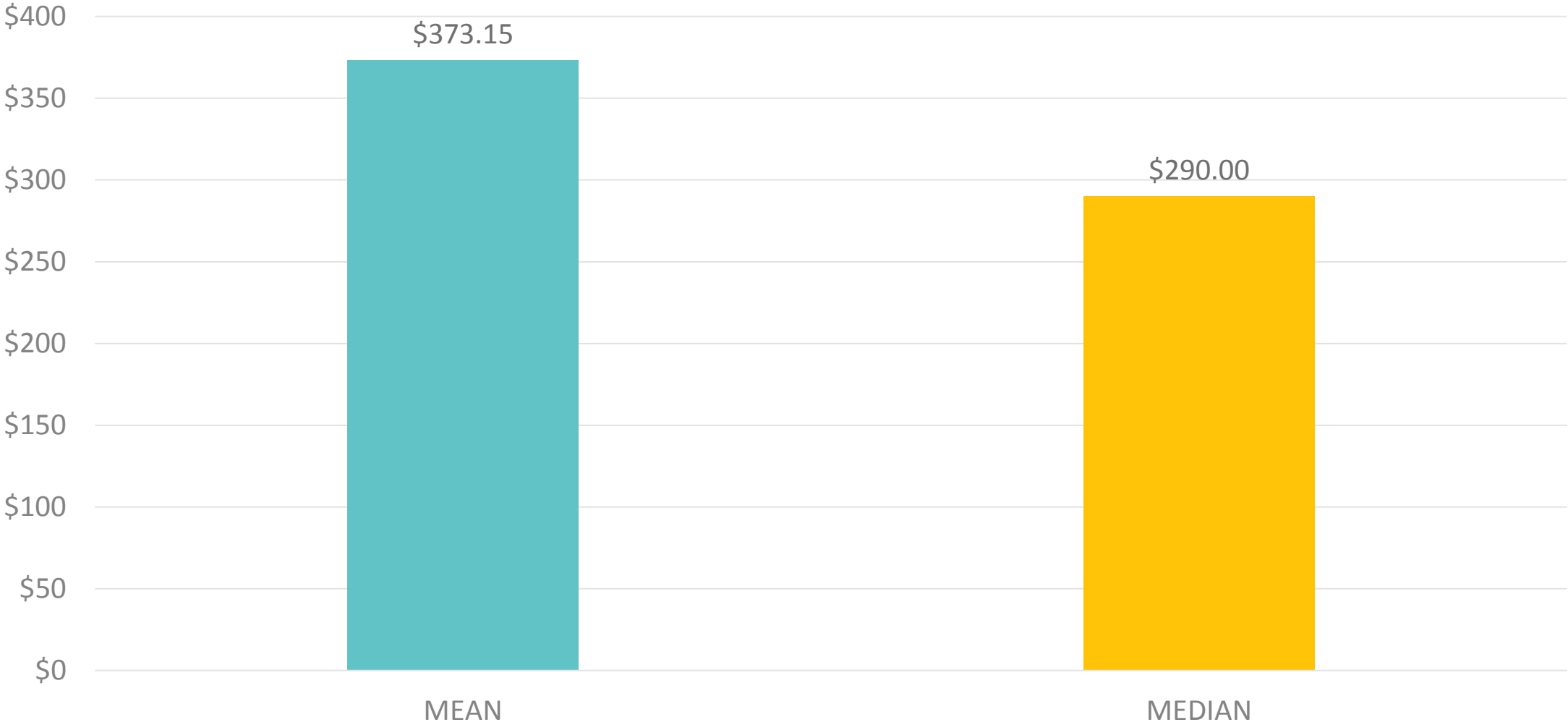
ONISLE – TRAVEL PARTY/ PER DAY TRACKING



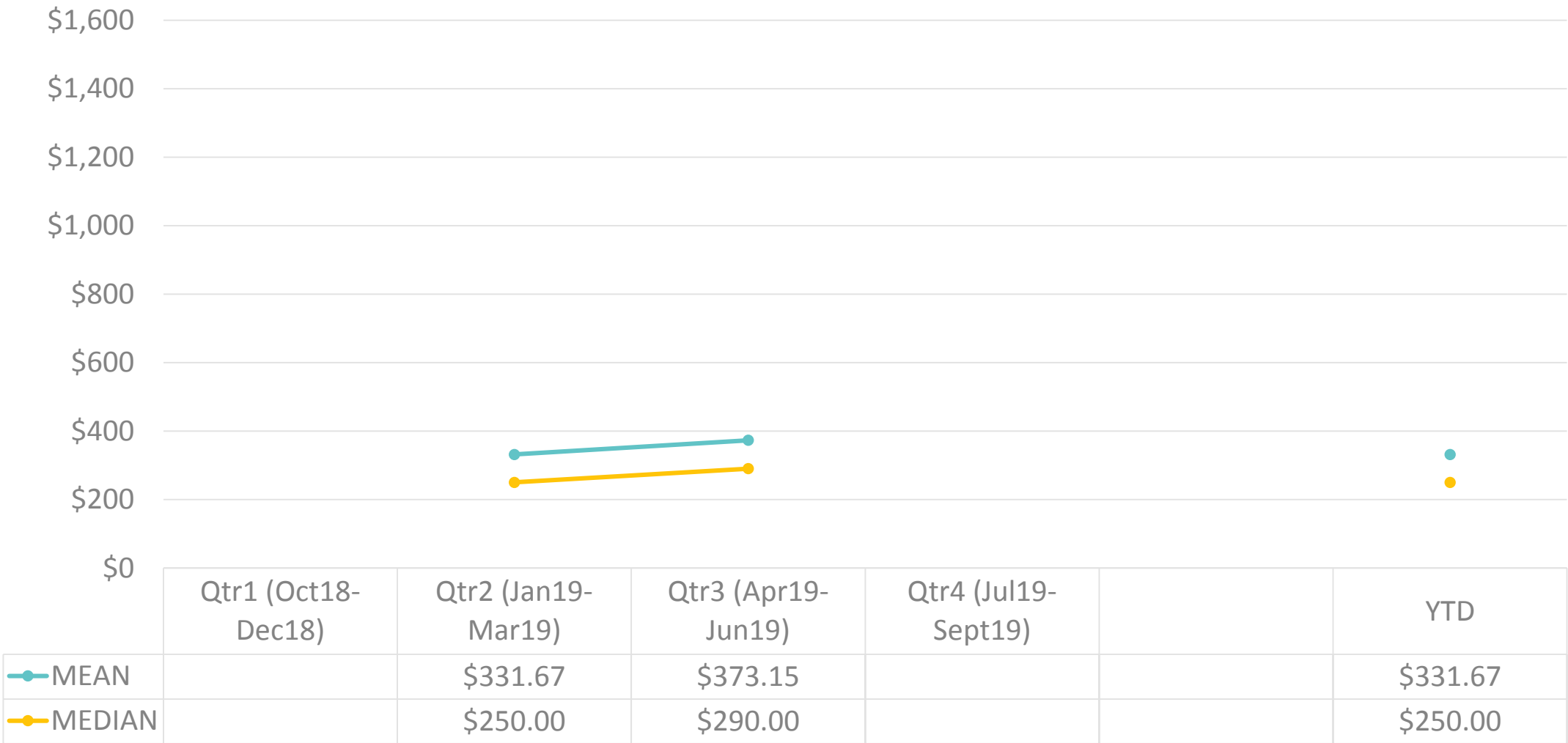
ONISLE – PER PERSON/ PER DAY TRACKING



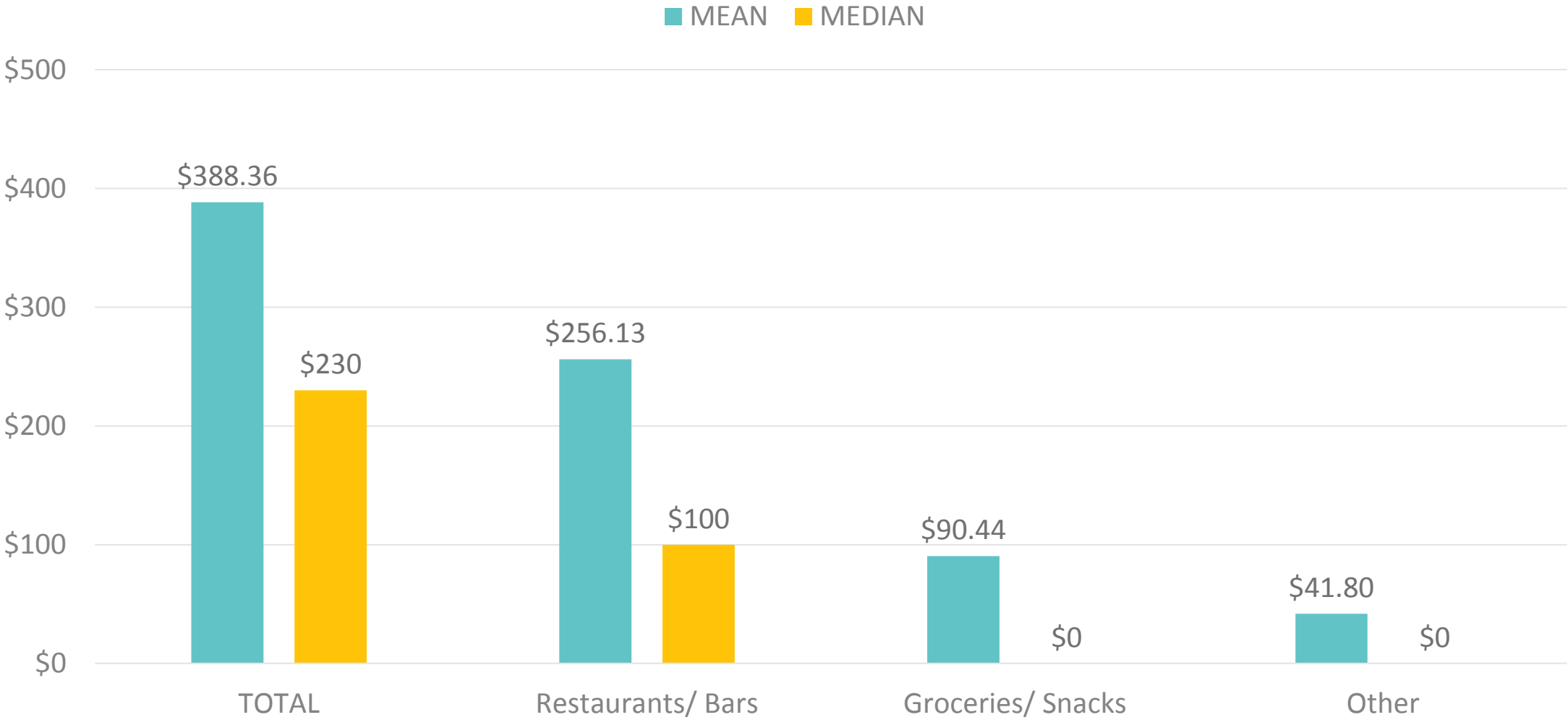
ONISLE – ACCOMMODATIONS



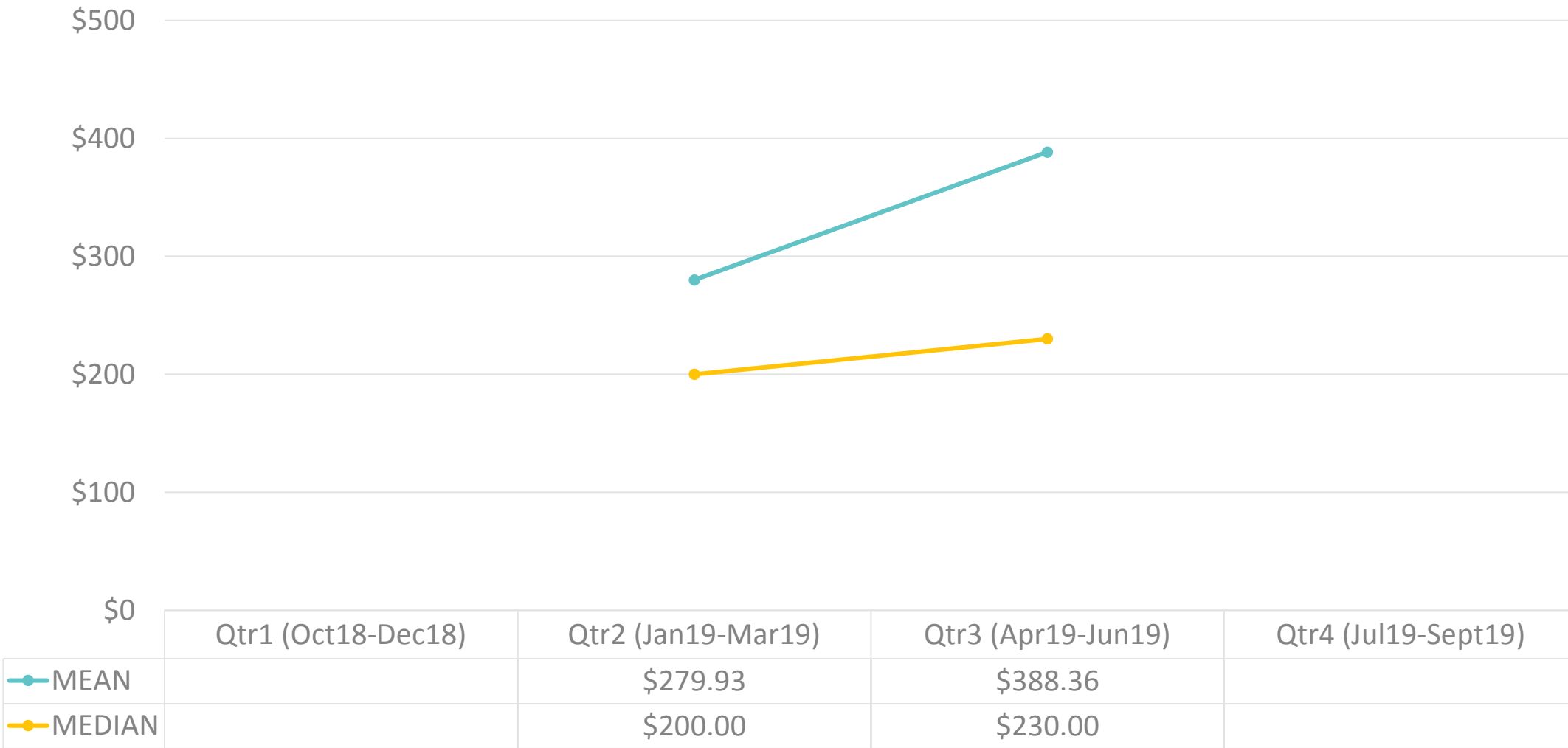
ONISLE – ACCOMMODATIONS TRACKING



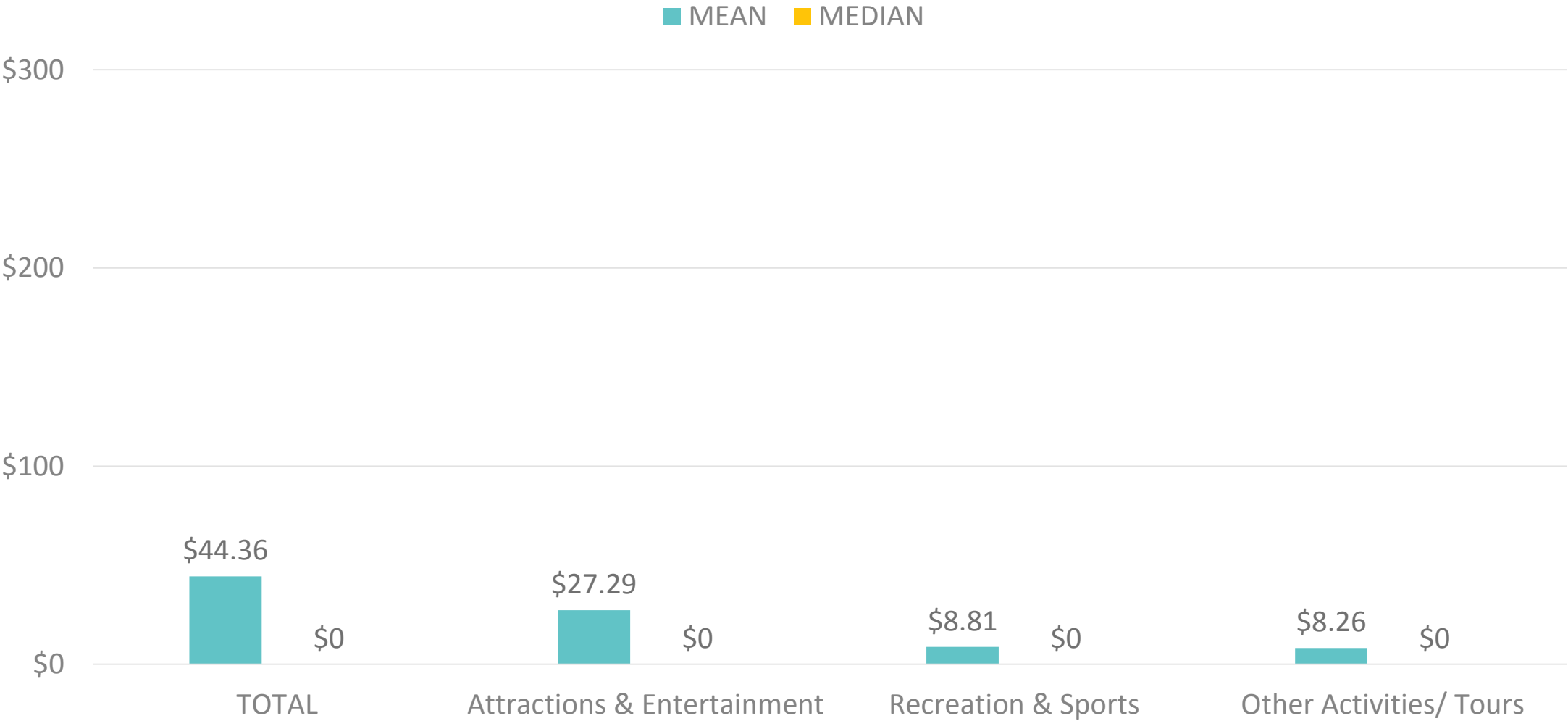
ONISLE – FOOD & BEVERAGE



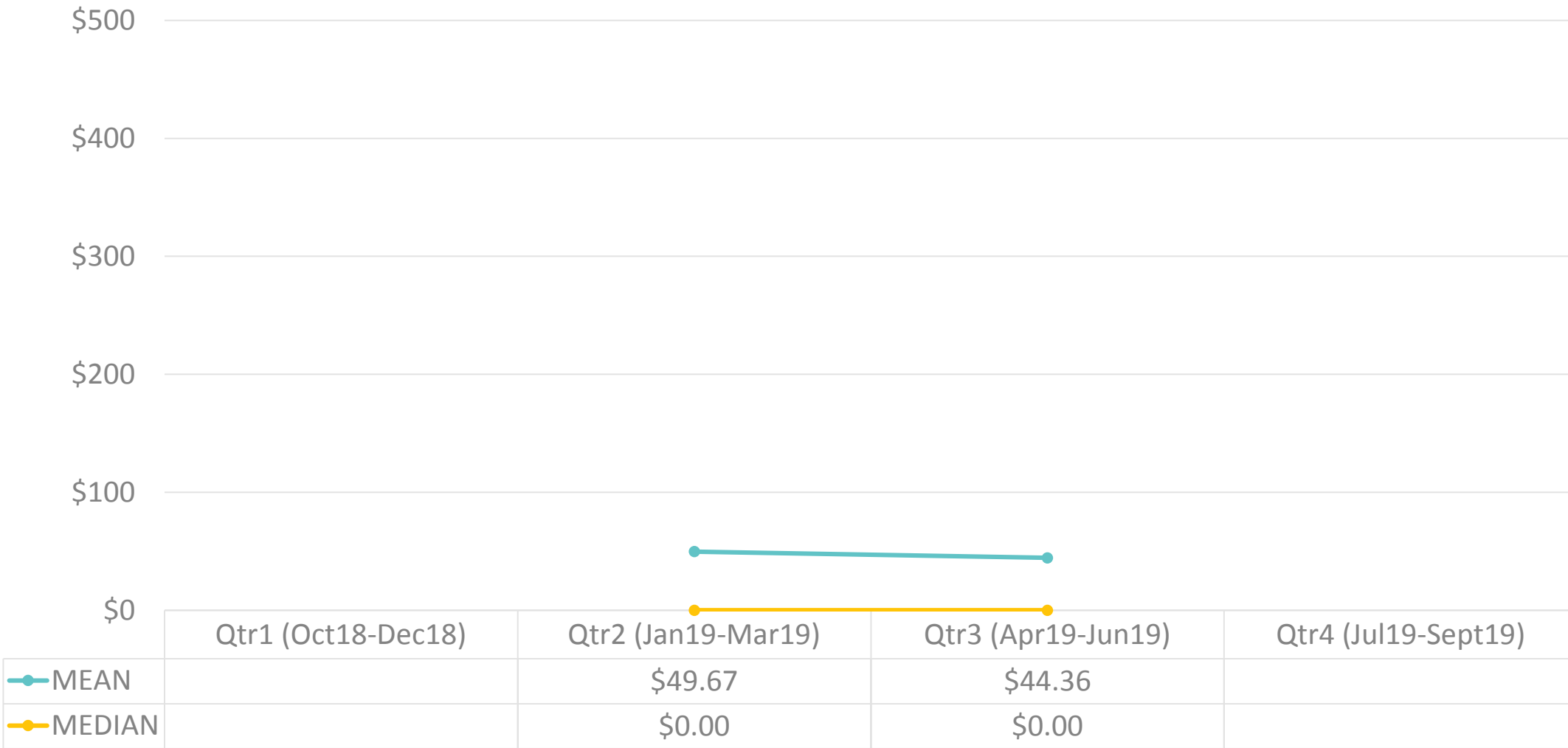
ONISLE – TOTAL FOOD & BEVERAGE TRACKING



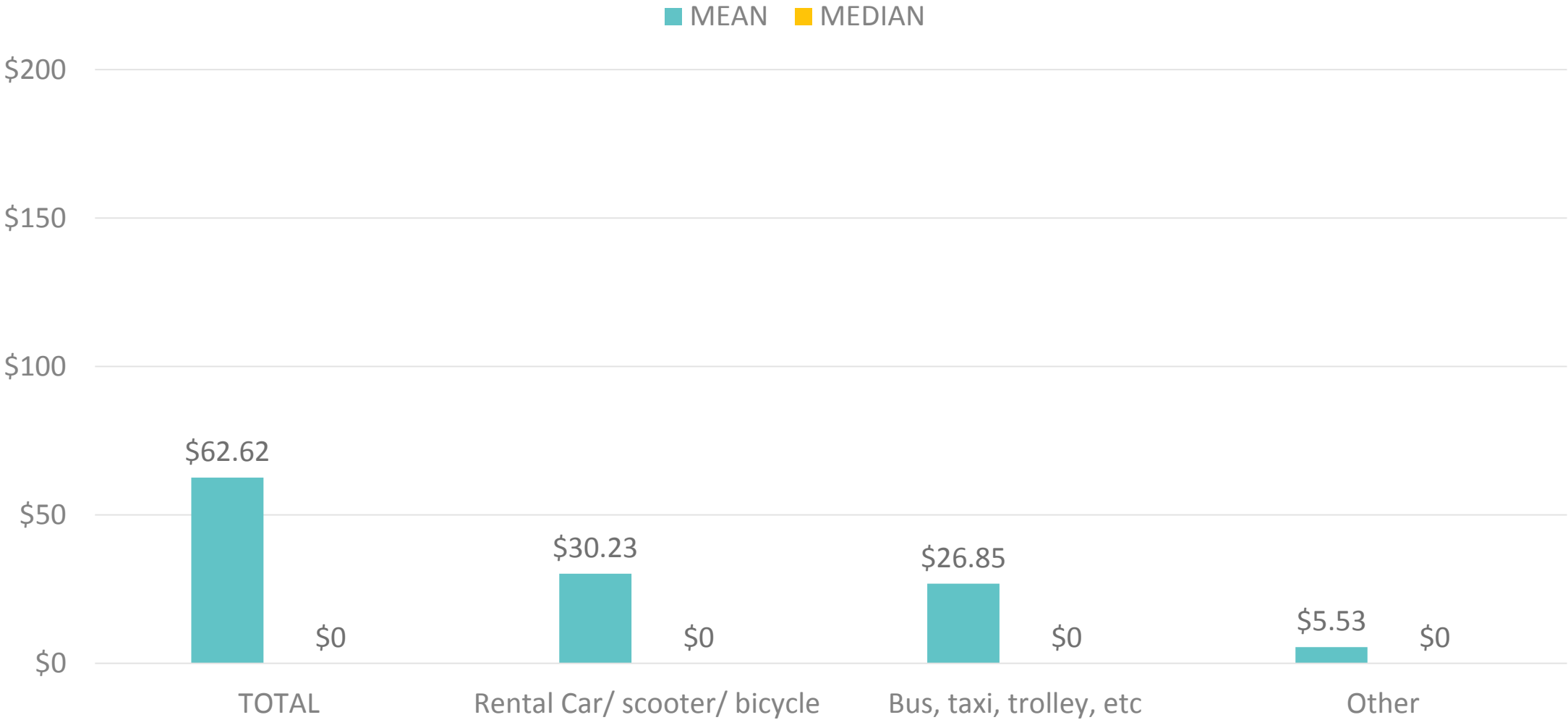
ONISLE – ENTERTAINMENT & RECREATION



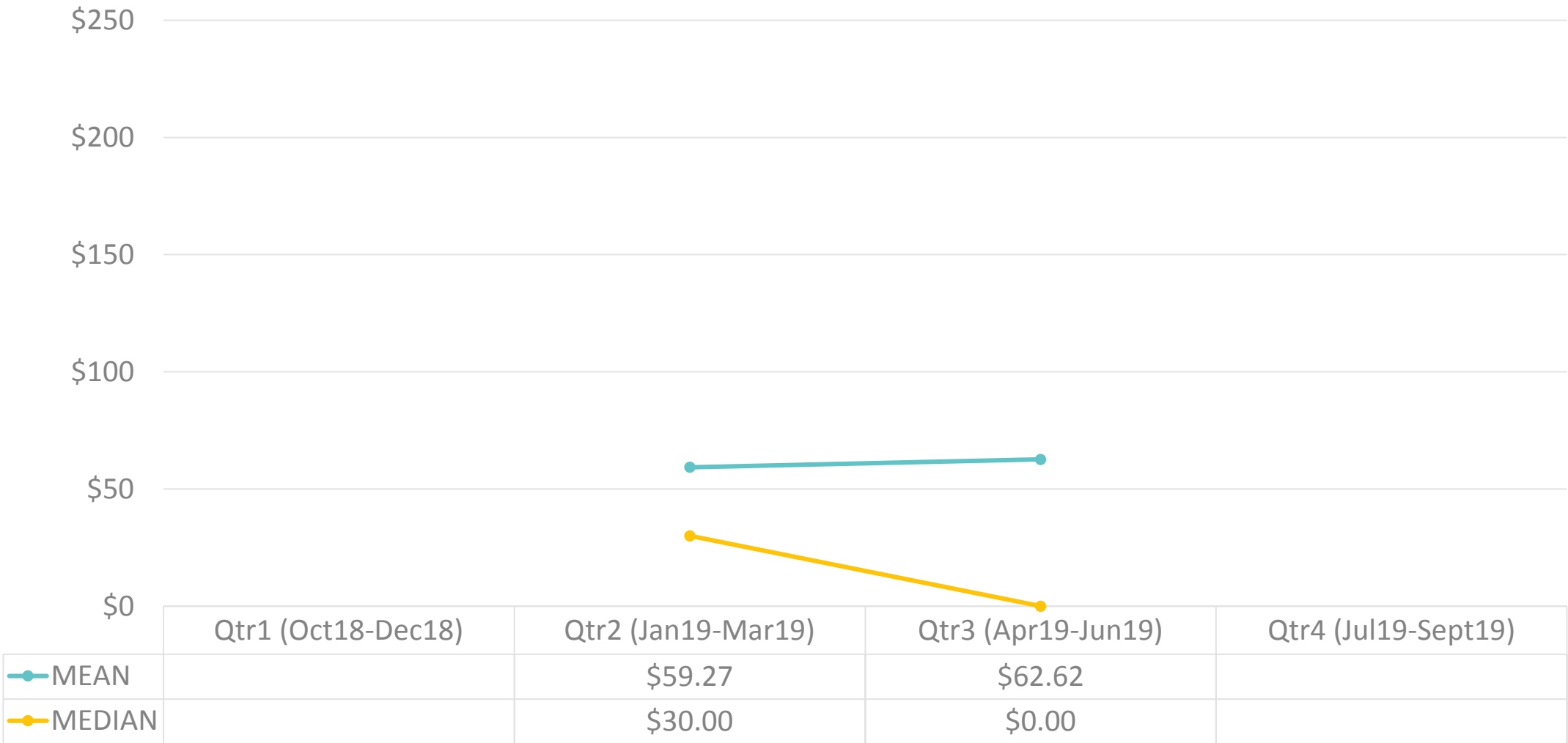
ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING



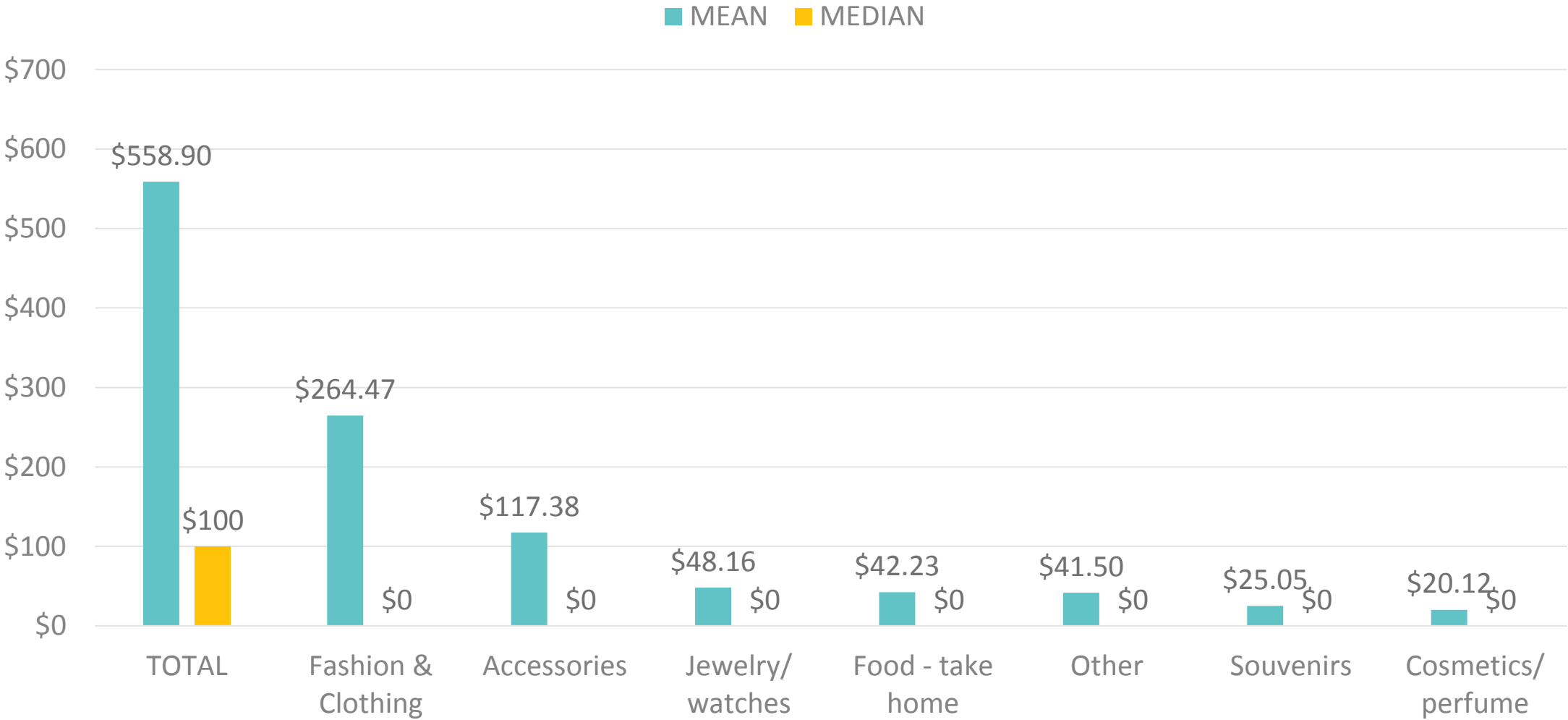
ONISLE – TRANSPORTATION



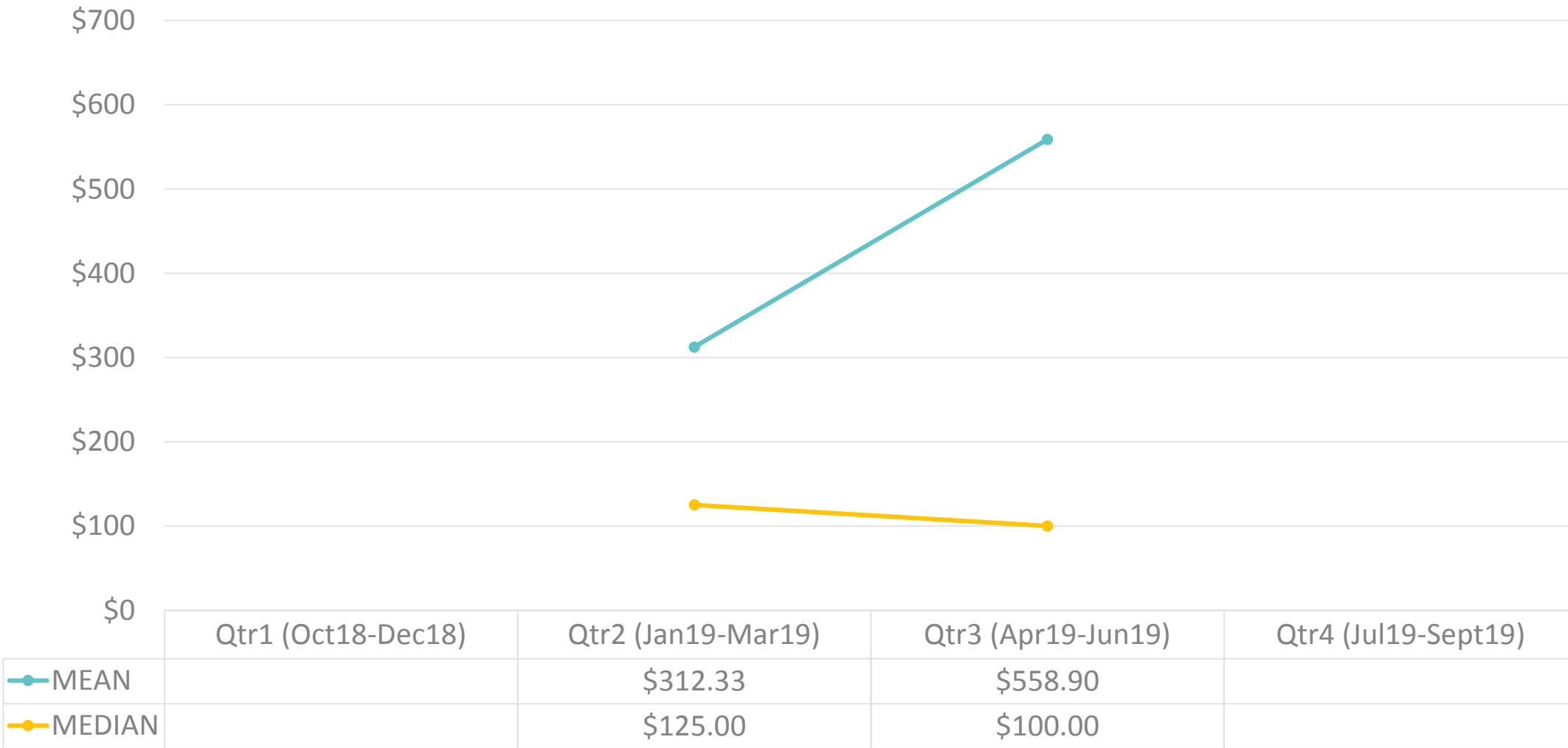
ONISLE – TOTAL TRANSPORTATION TRACKING



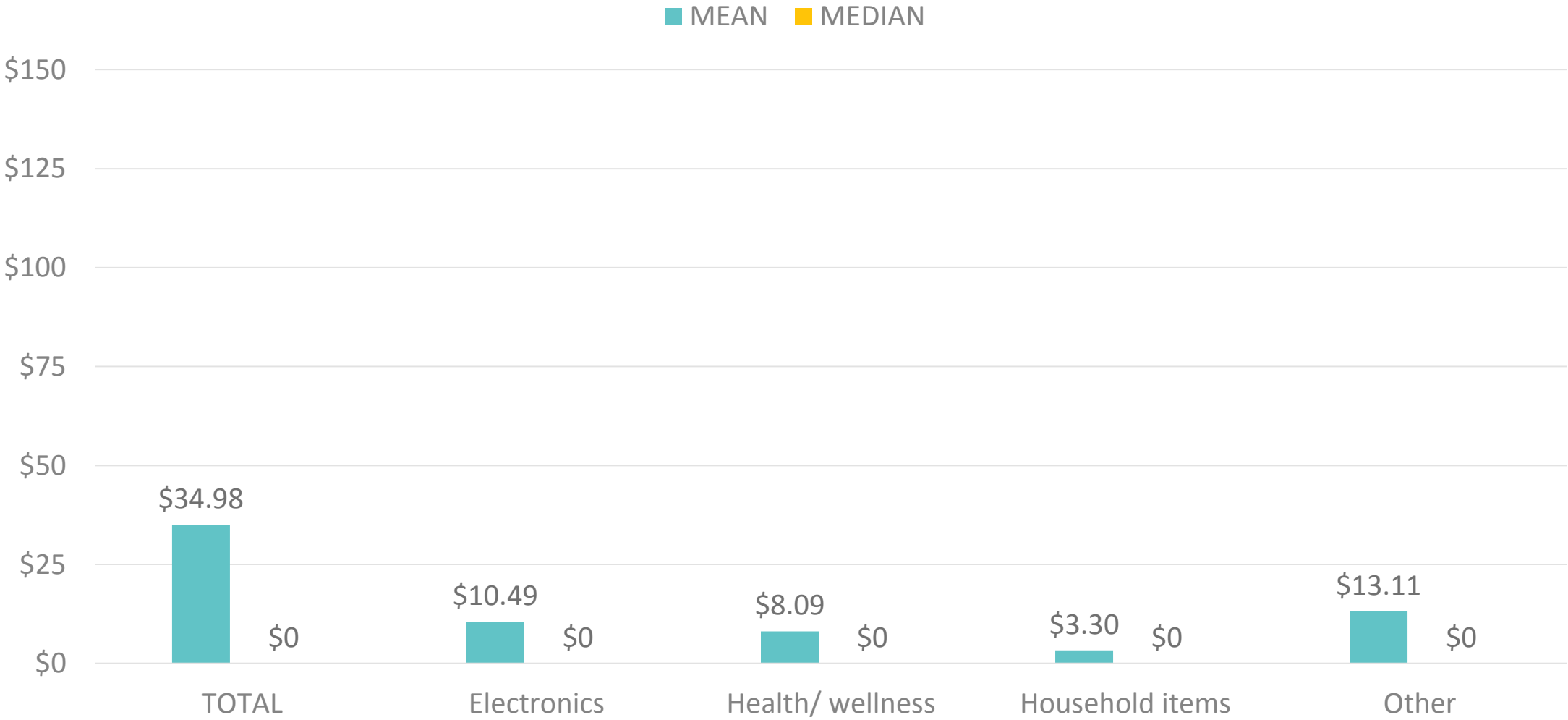
ONISLE – SHOPPING



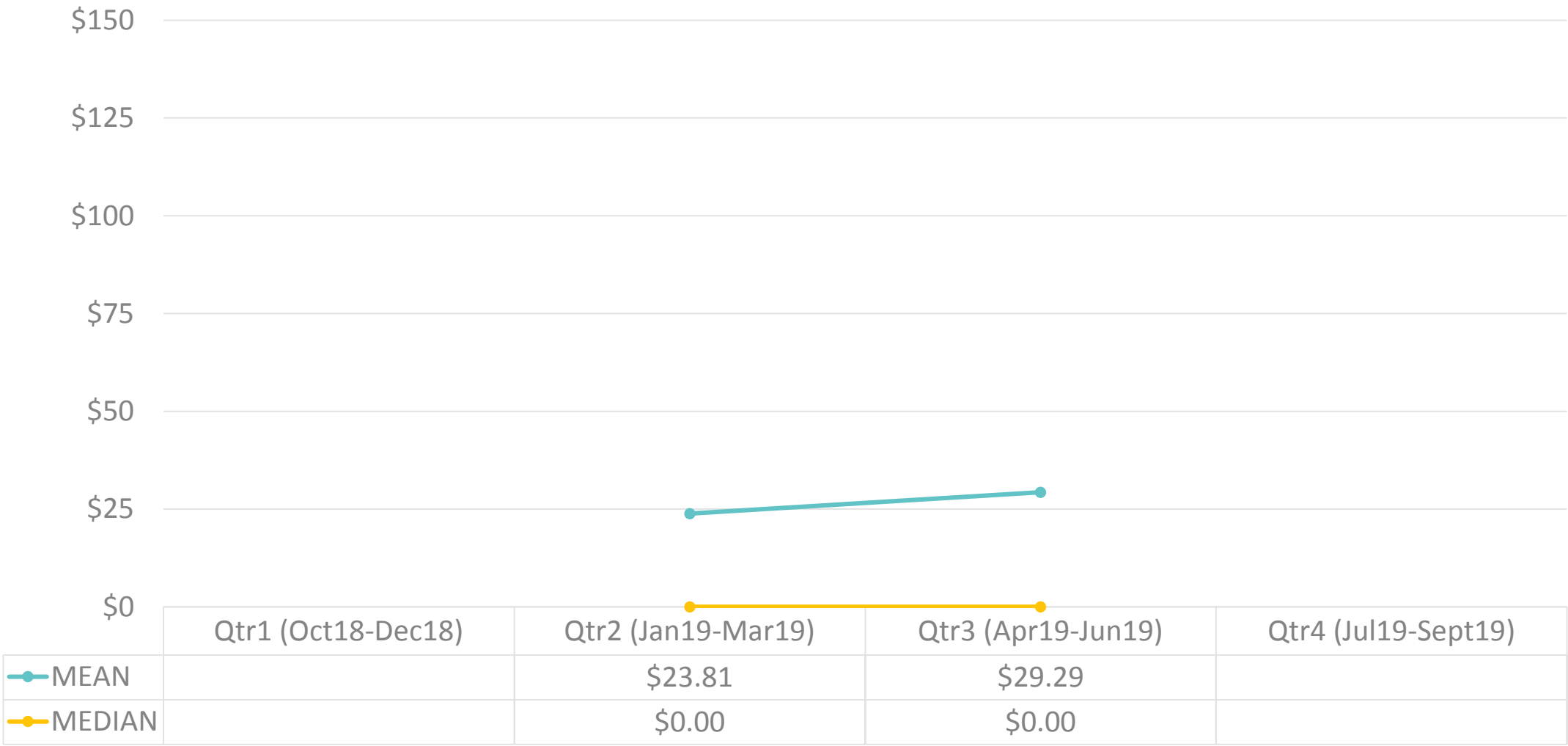
ONISLE – TOTAL SHOPPING TRACKING



ONISLE – MISCELLANEOUS



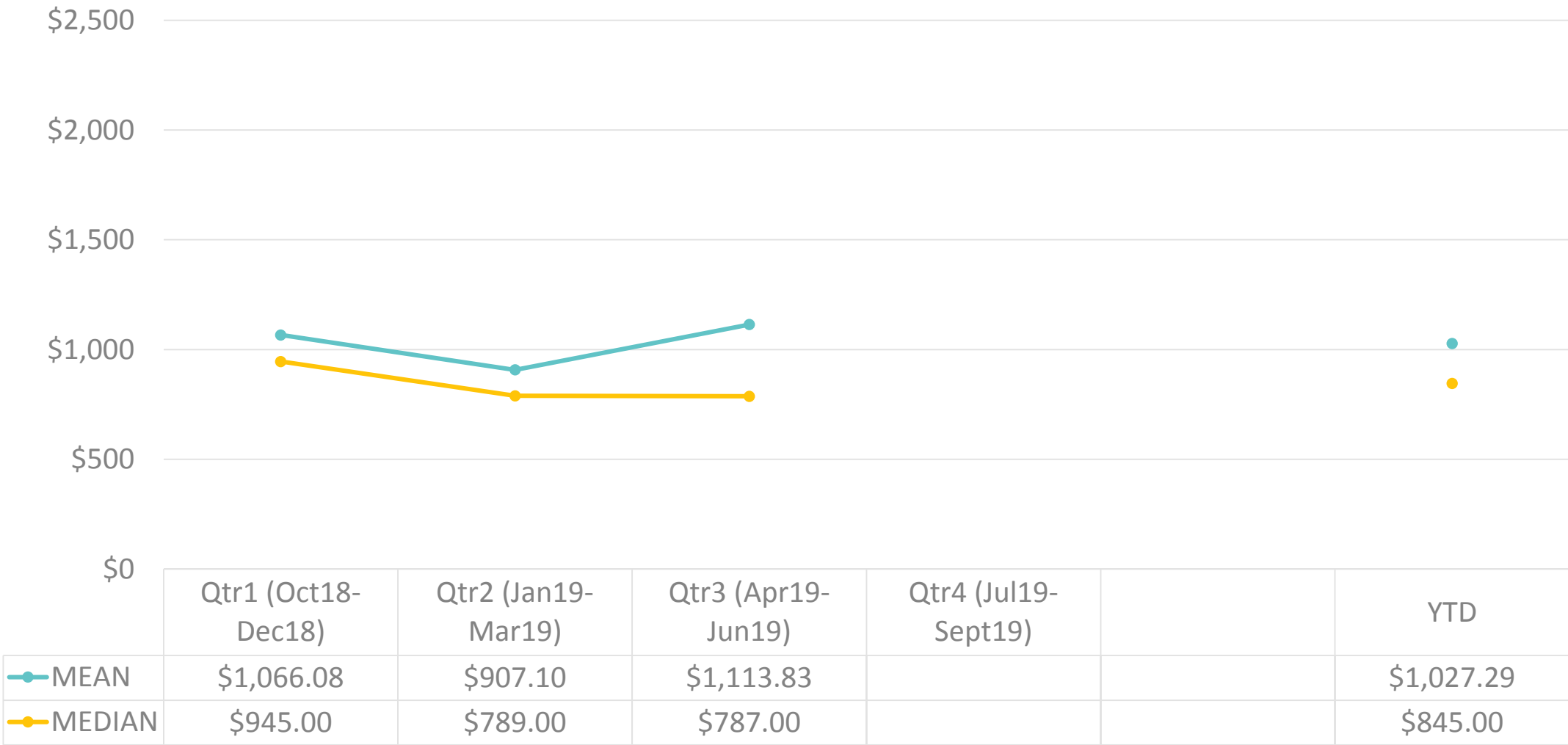
ONISLE – MISCELLANEOUS TRACKING



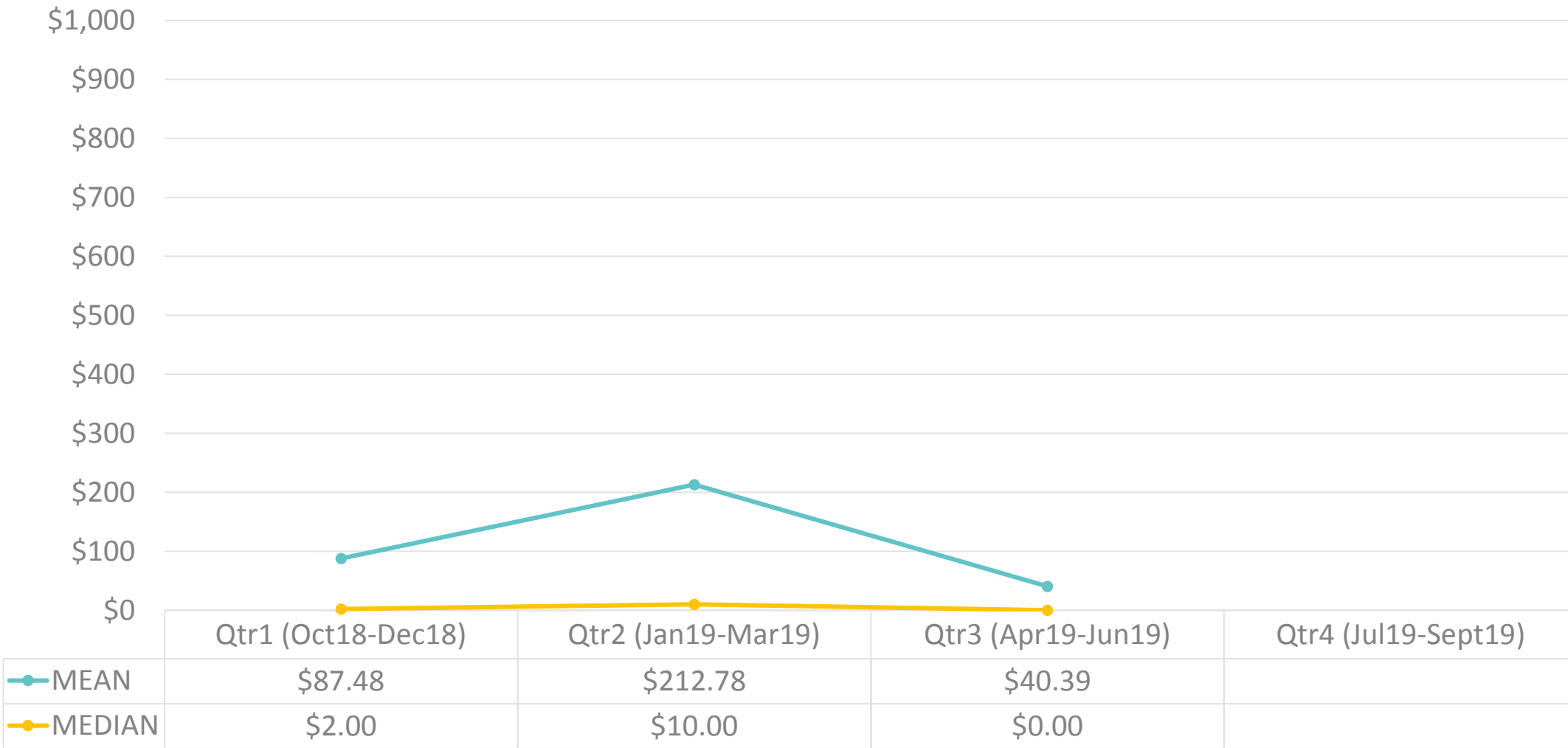
TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

- \$1,113.83 = Mean average per person
- \$787.00 = Median amount spent per person

TOTAL EXPENDITURES PER PERSON TRACKING



GUAM AIRPORT EXPENDITURE TRACKING



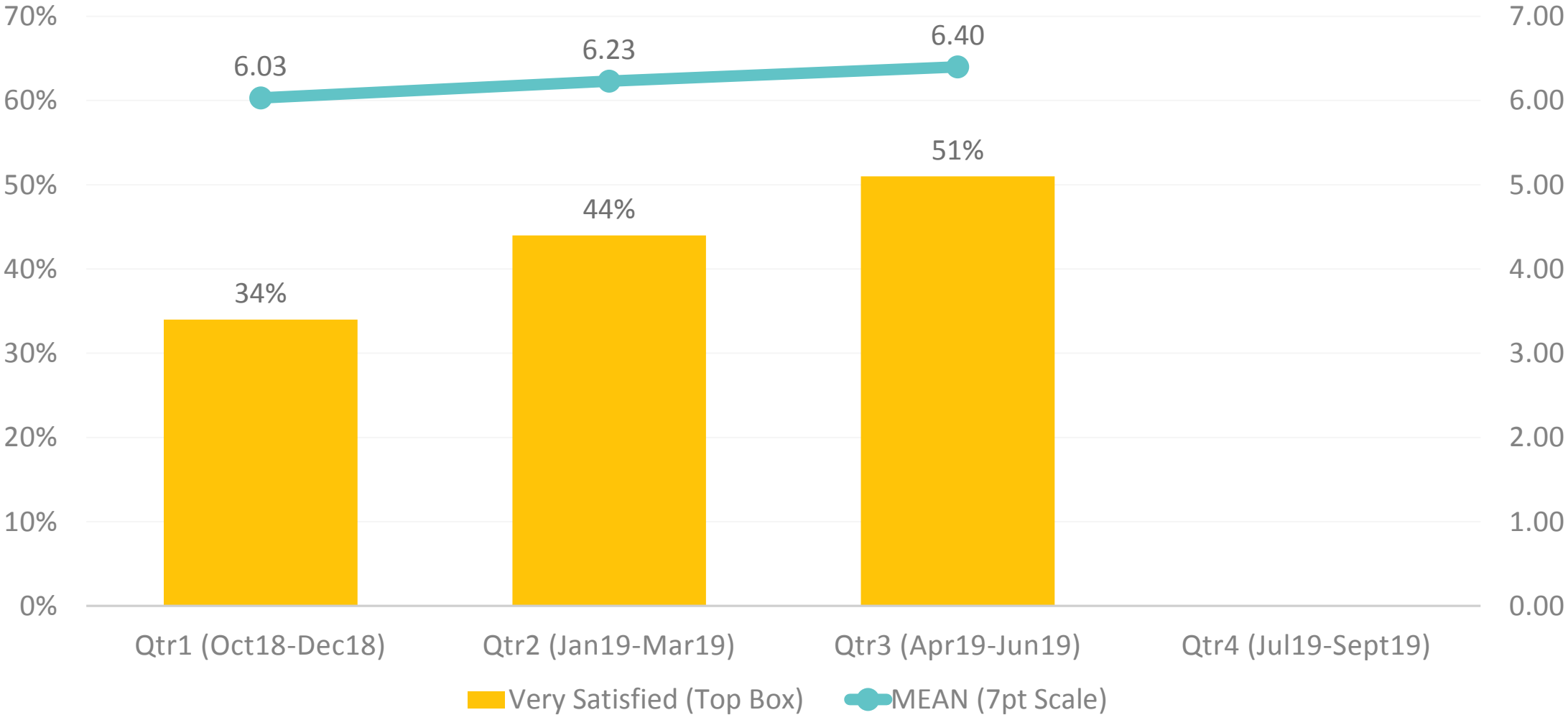


SECTION 4

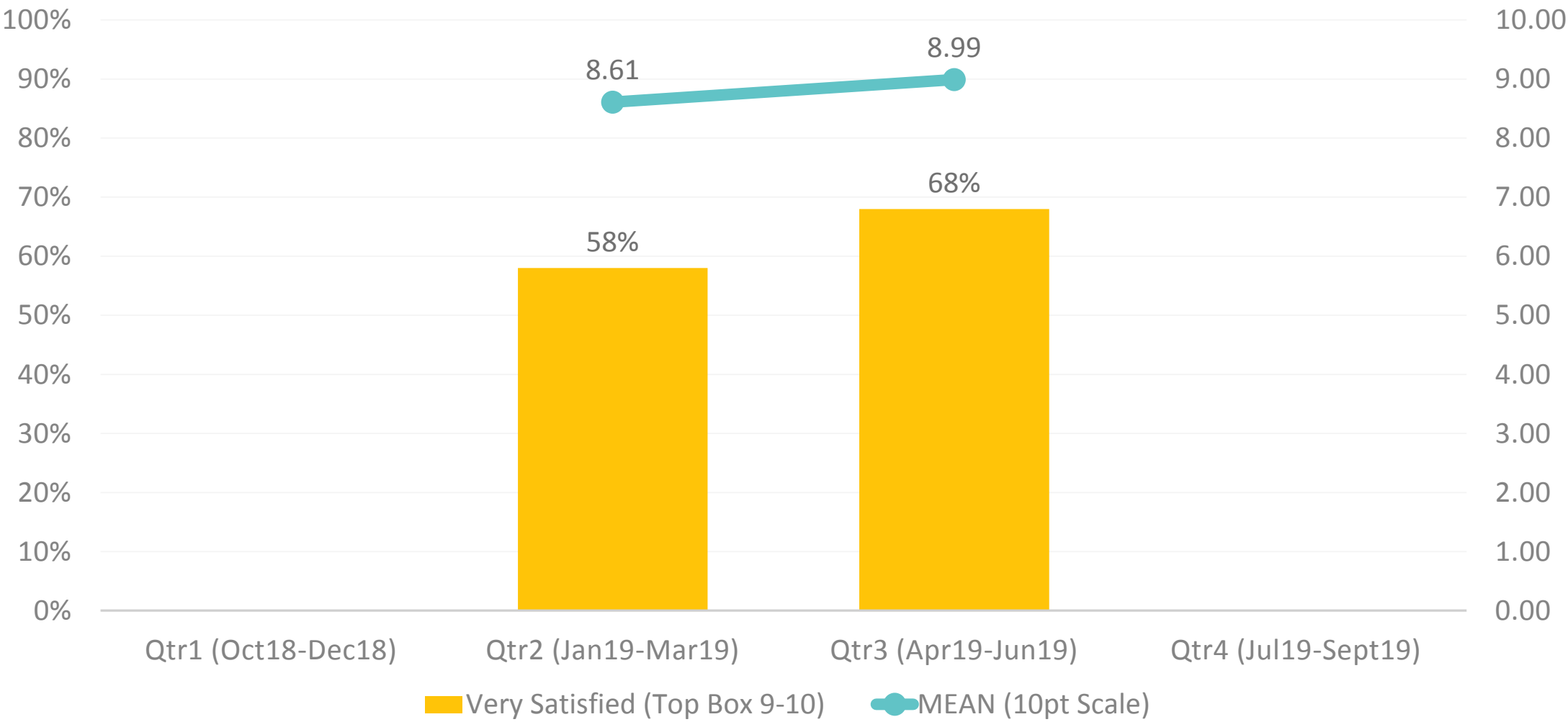
VISITOR SATISFACTION



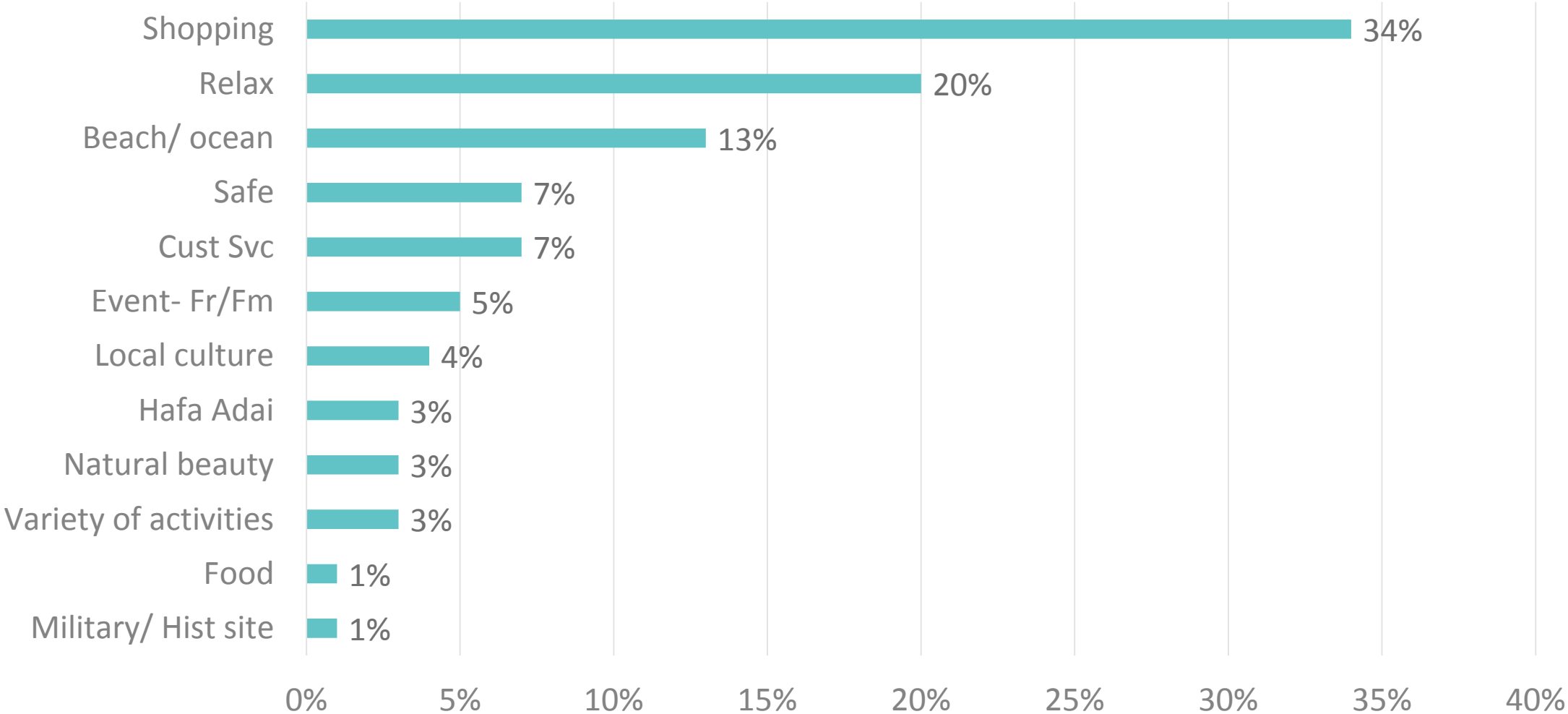
OVERALL SATISFACTION – 7PT SCALE



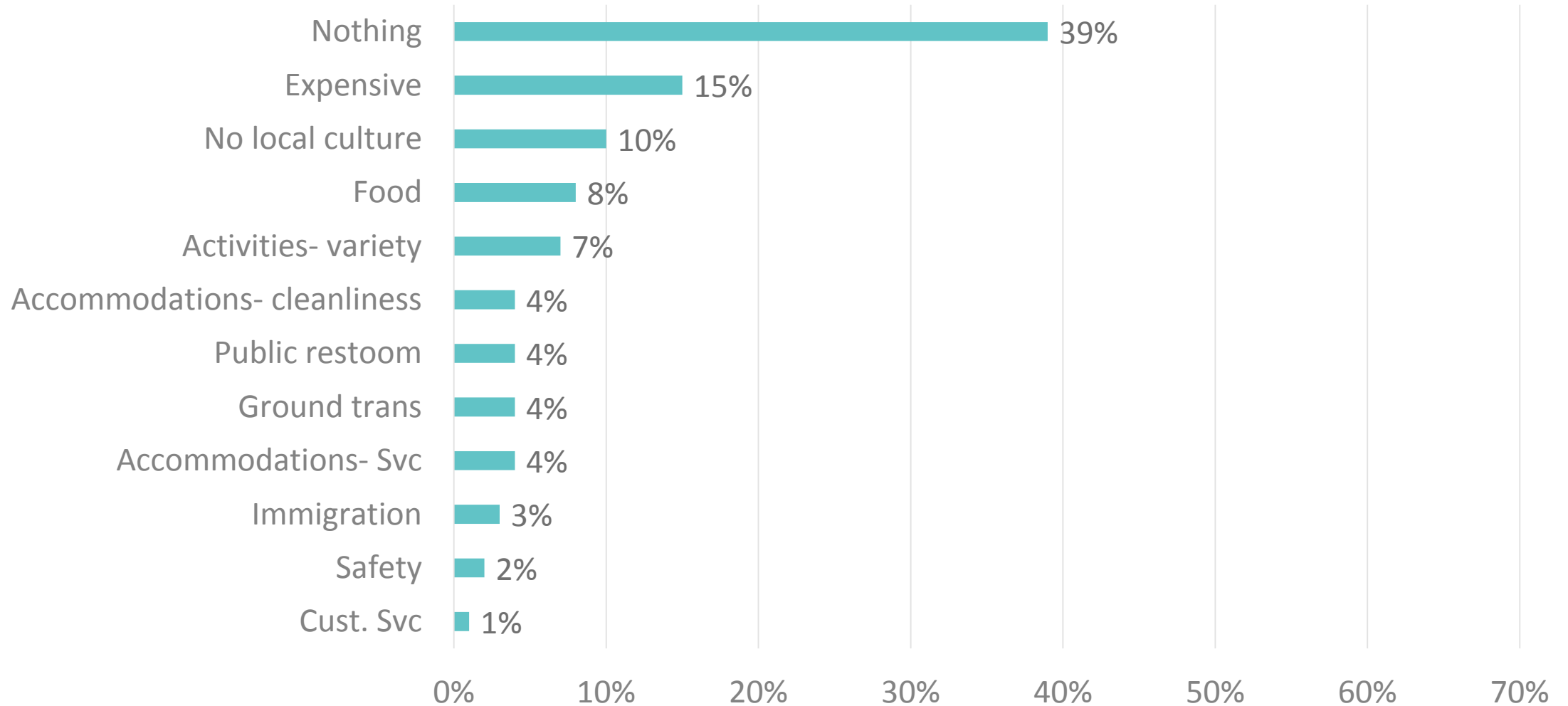
OVERALL SATISFACTION – 10PT SCALE



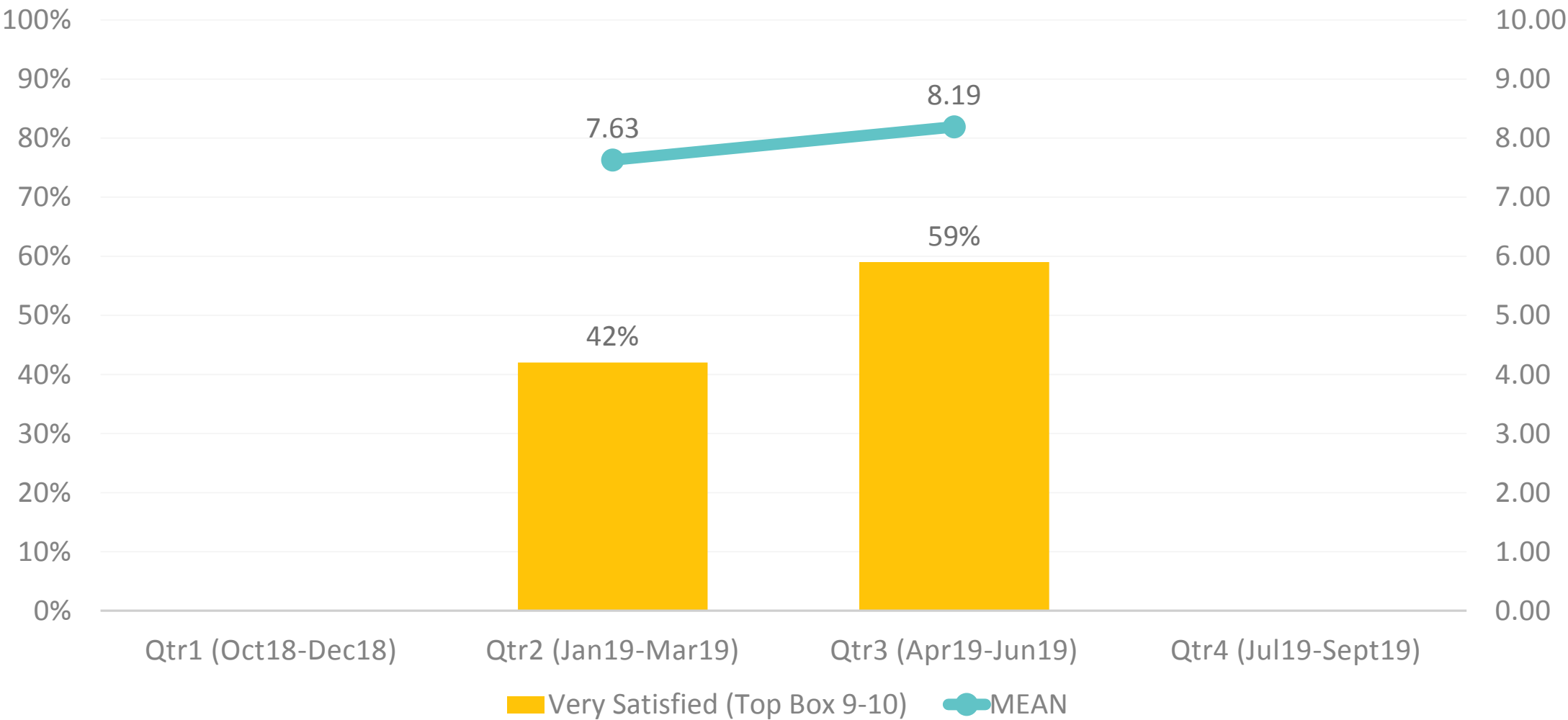
SWOT – POSITIVE ASPECT OF TRIP



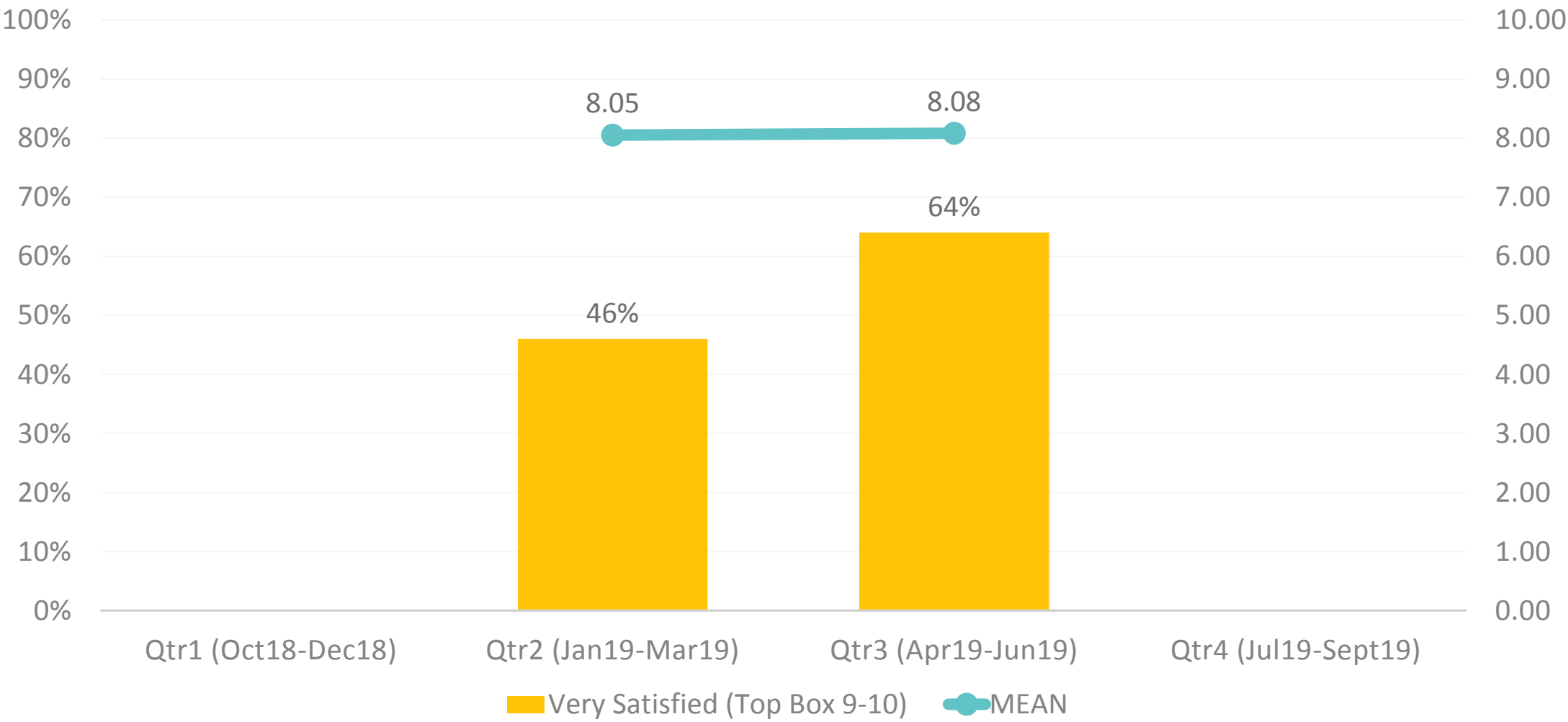
SWOT – NEGATIVE ASPECT OF TRIP



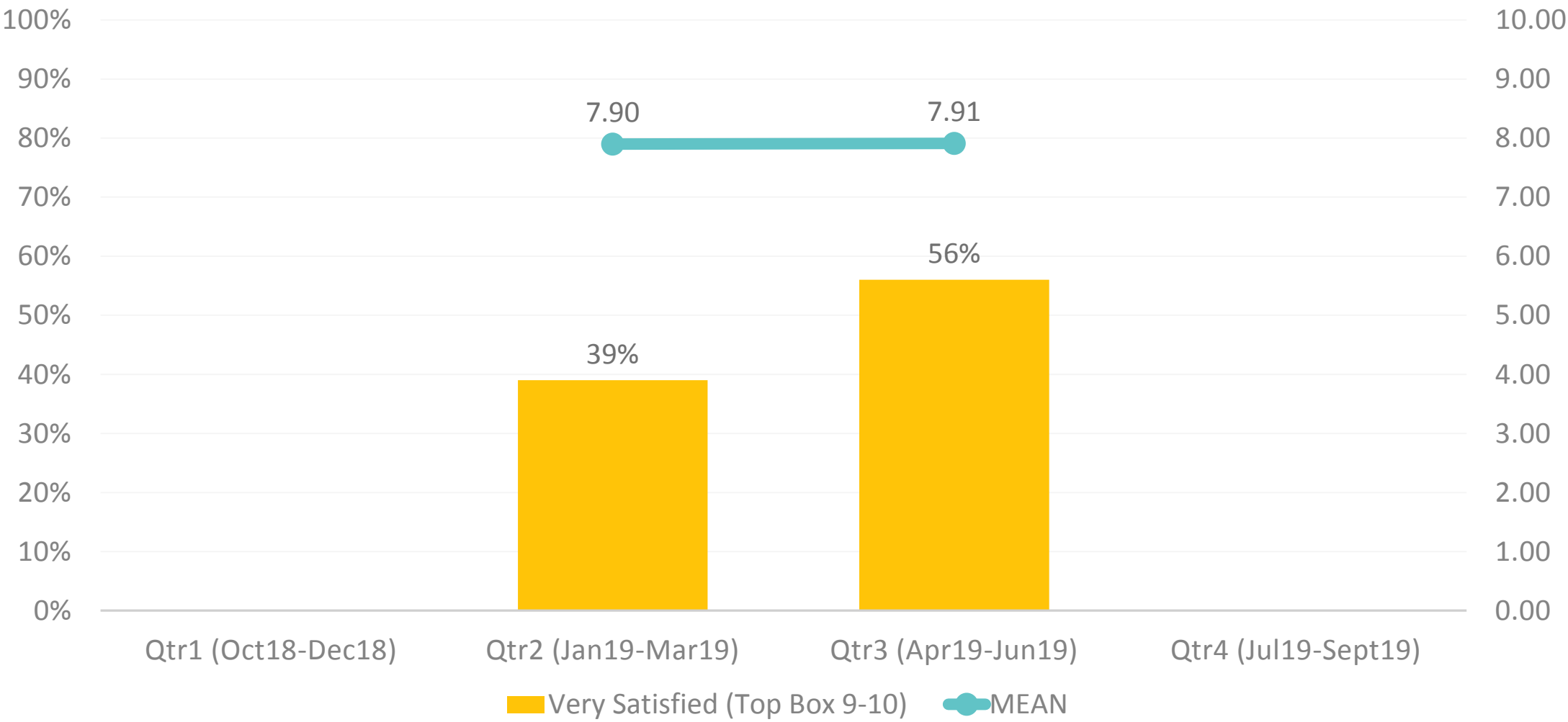
SATISFACTION – ENTERTAINMENT



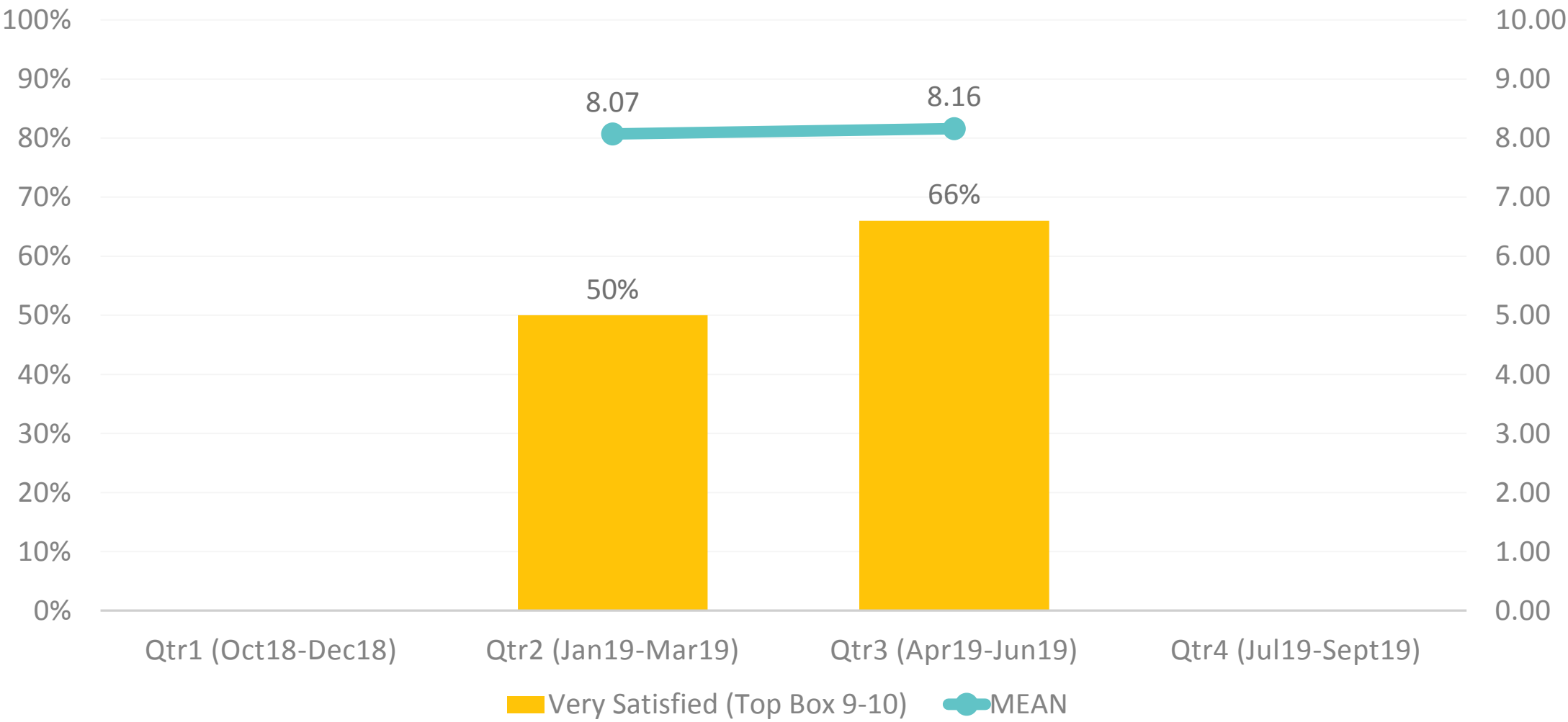
SATISFACTION – SHOPPING



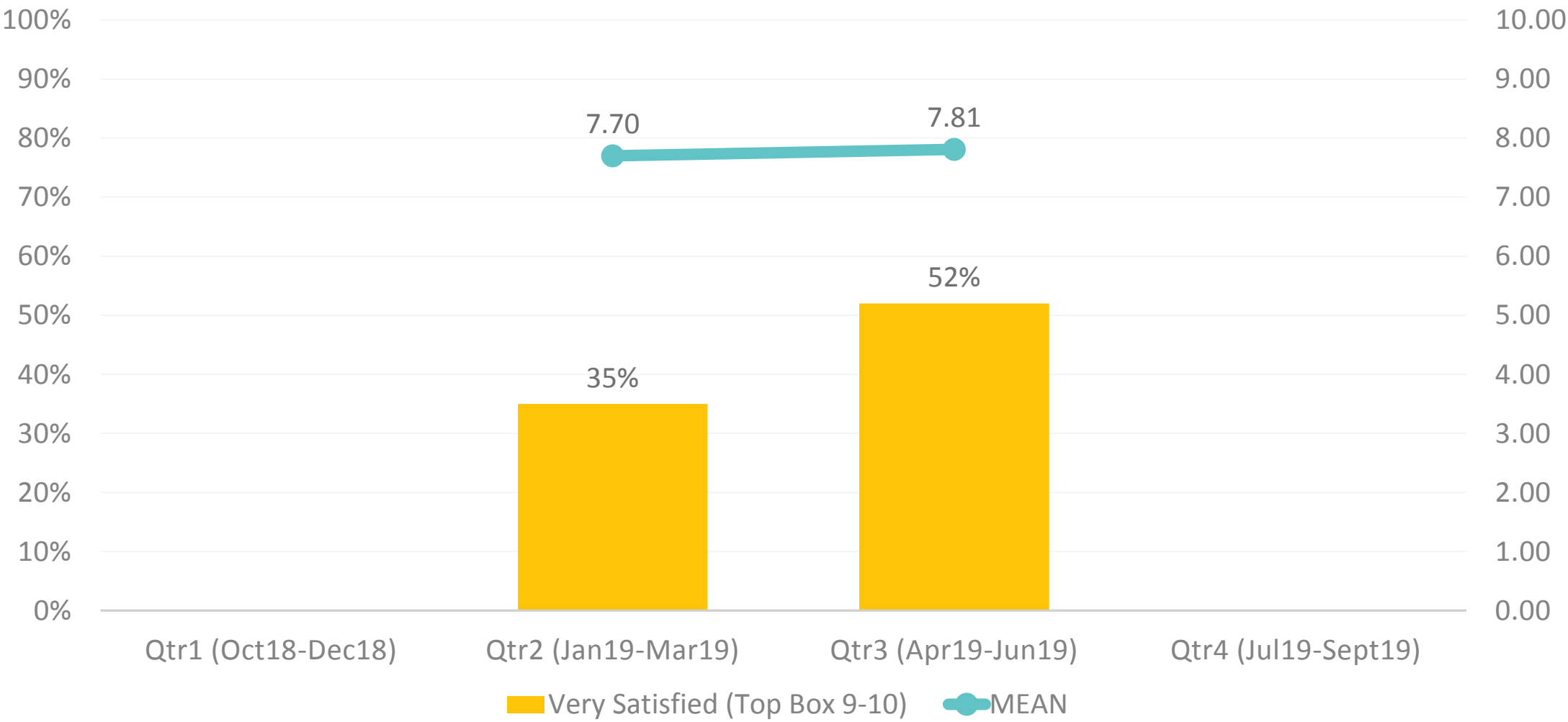
SATISFACTION – DINING



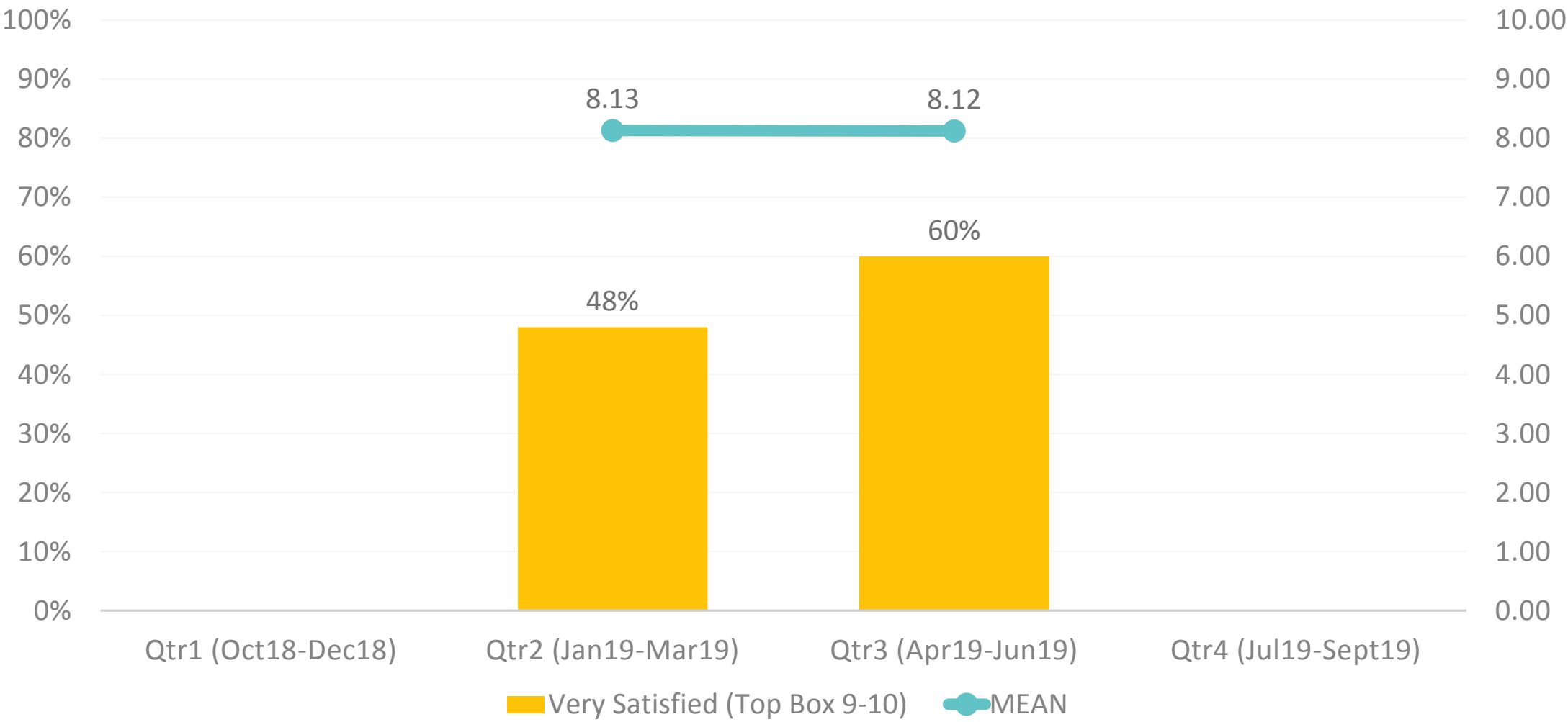
SATISFACTION – BEACHES



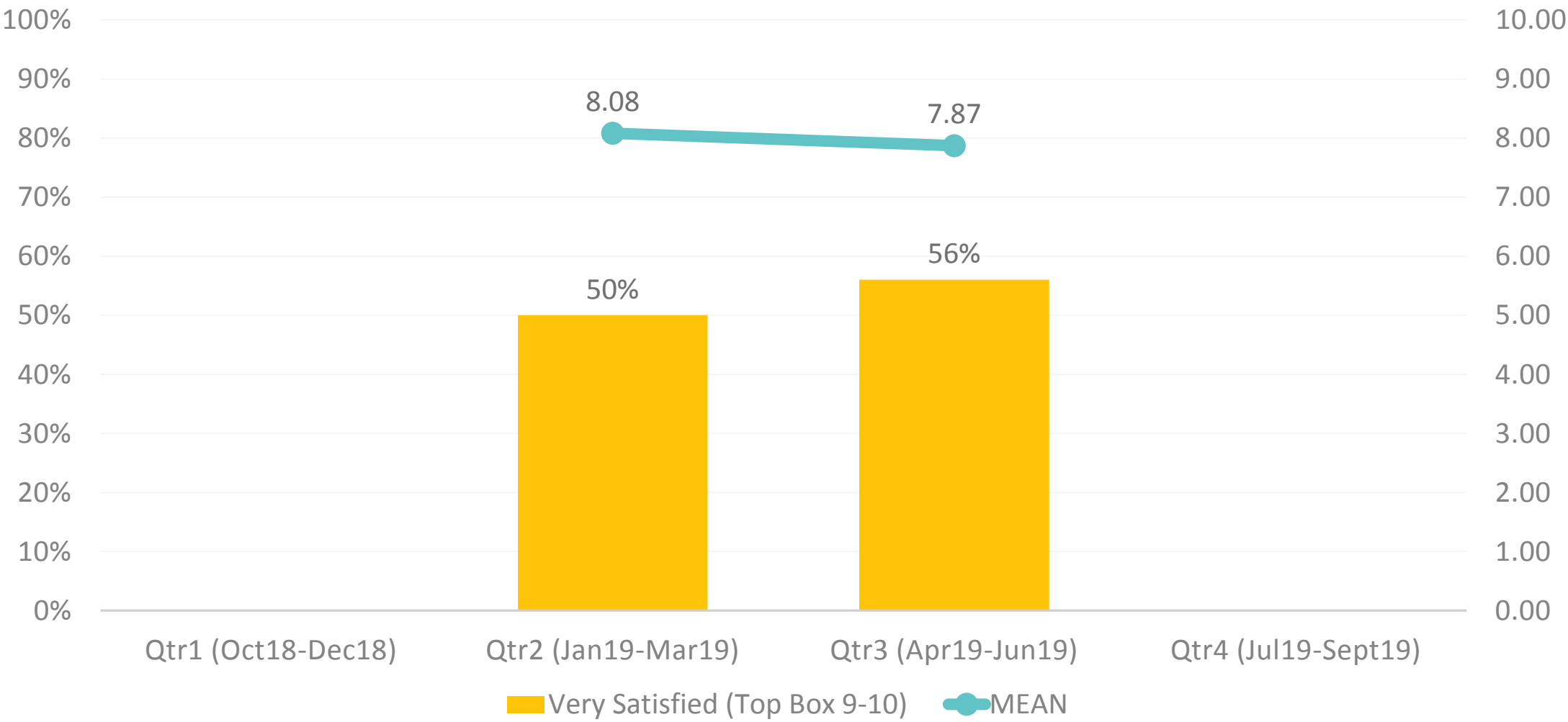
SATISFACTION – PARKS



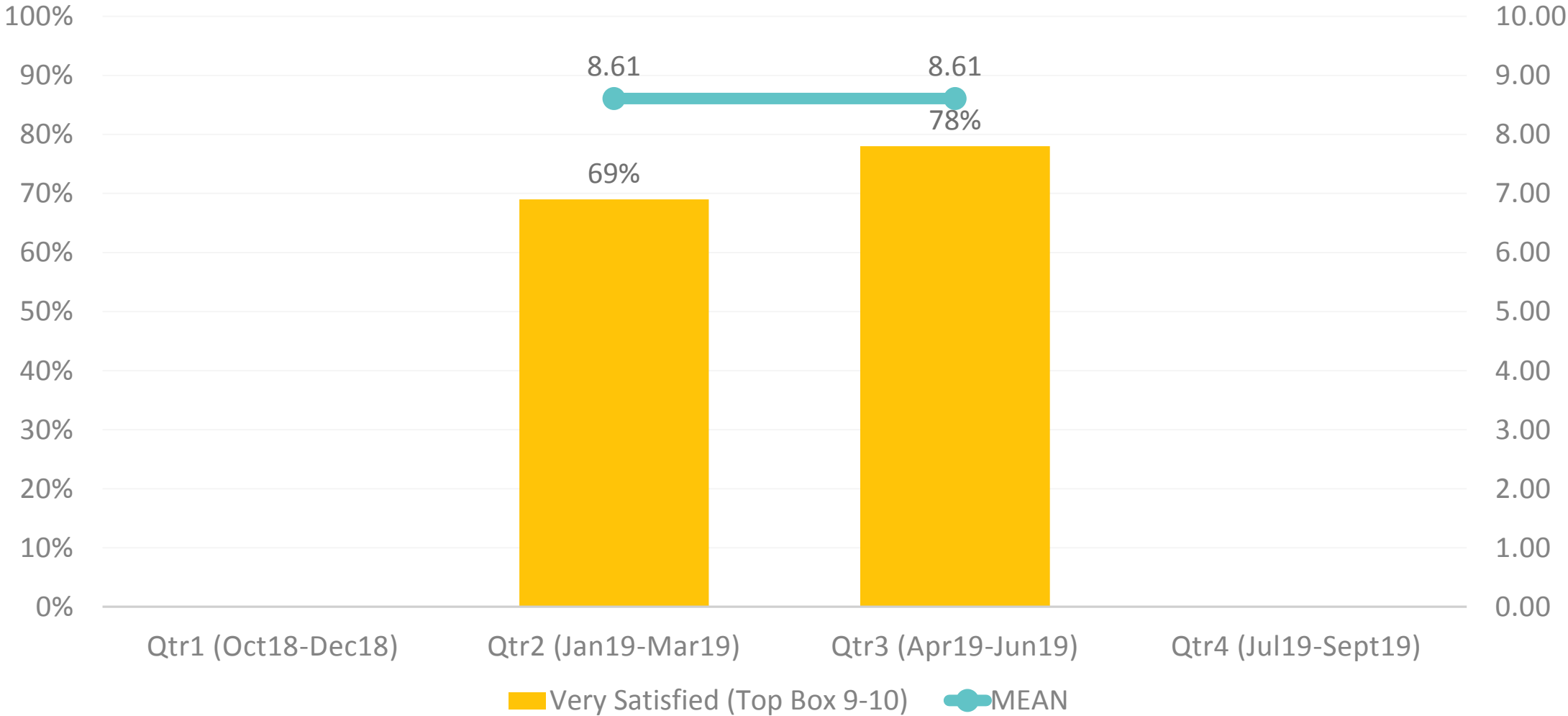
SATISFACTION – ROADS



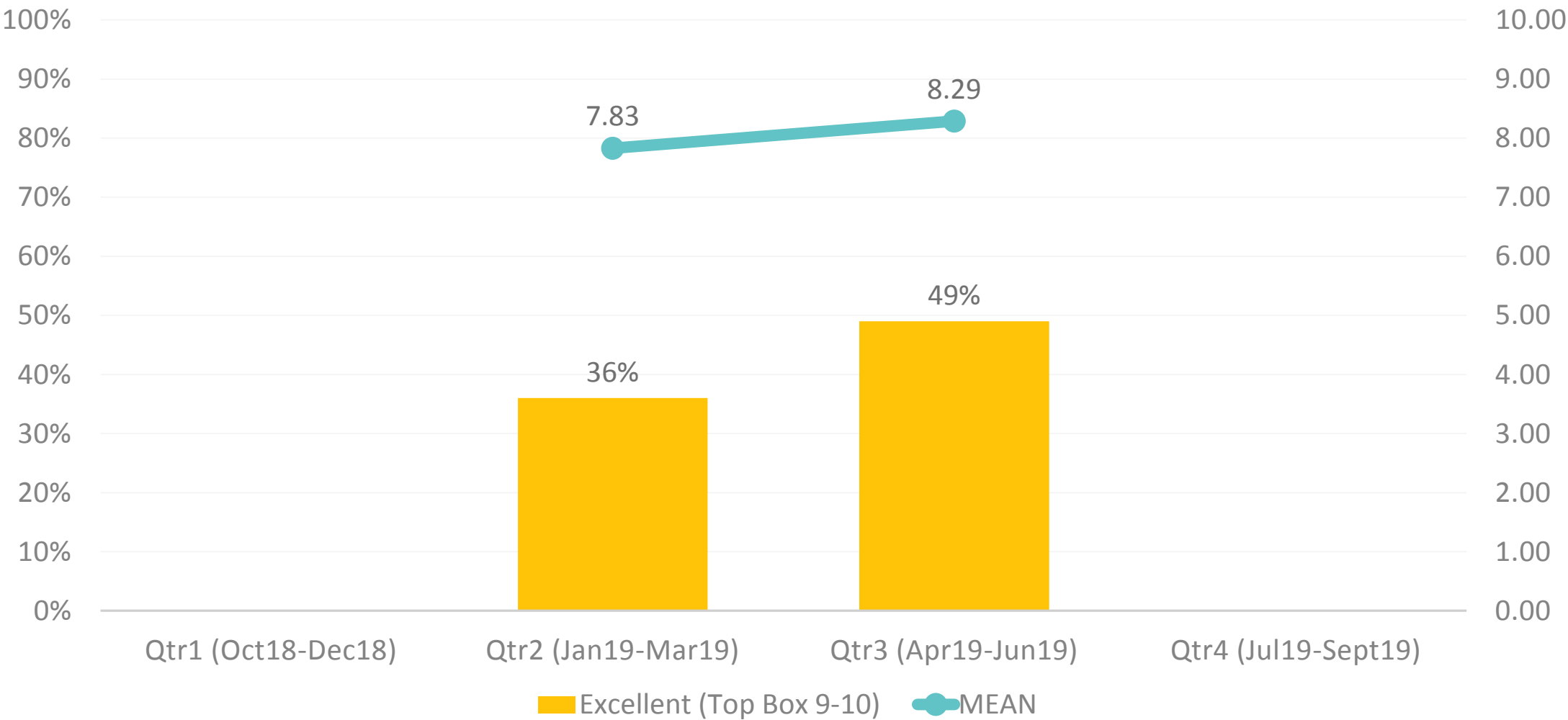
SATISFACTION – SIGHTSEEING AREAS



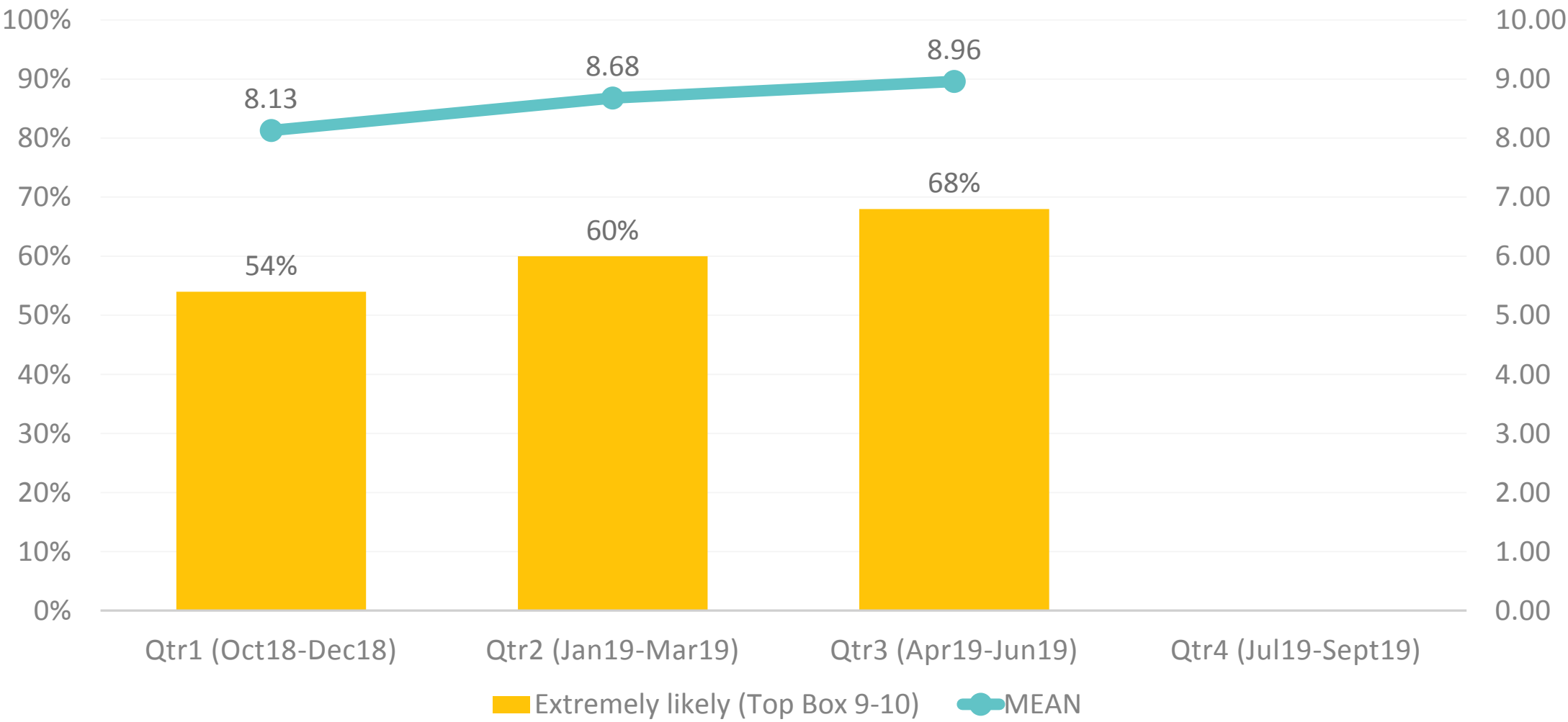
SATISFACTION – SAFETY & SECURITY



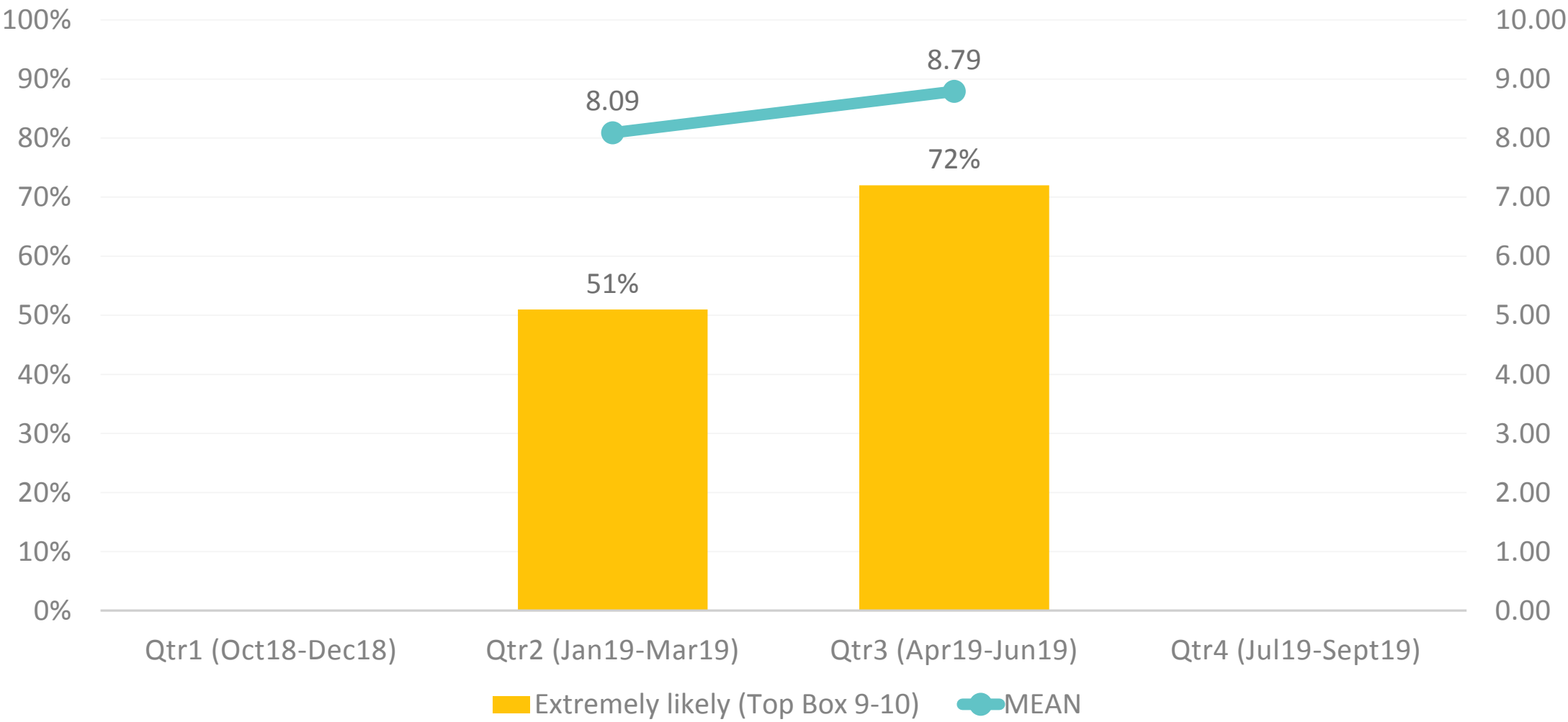
SATISFACTION – ACCOMMODATIONS



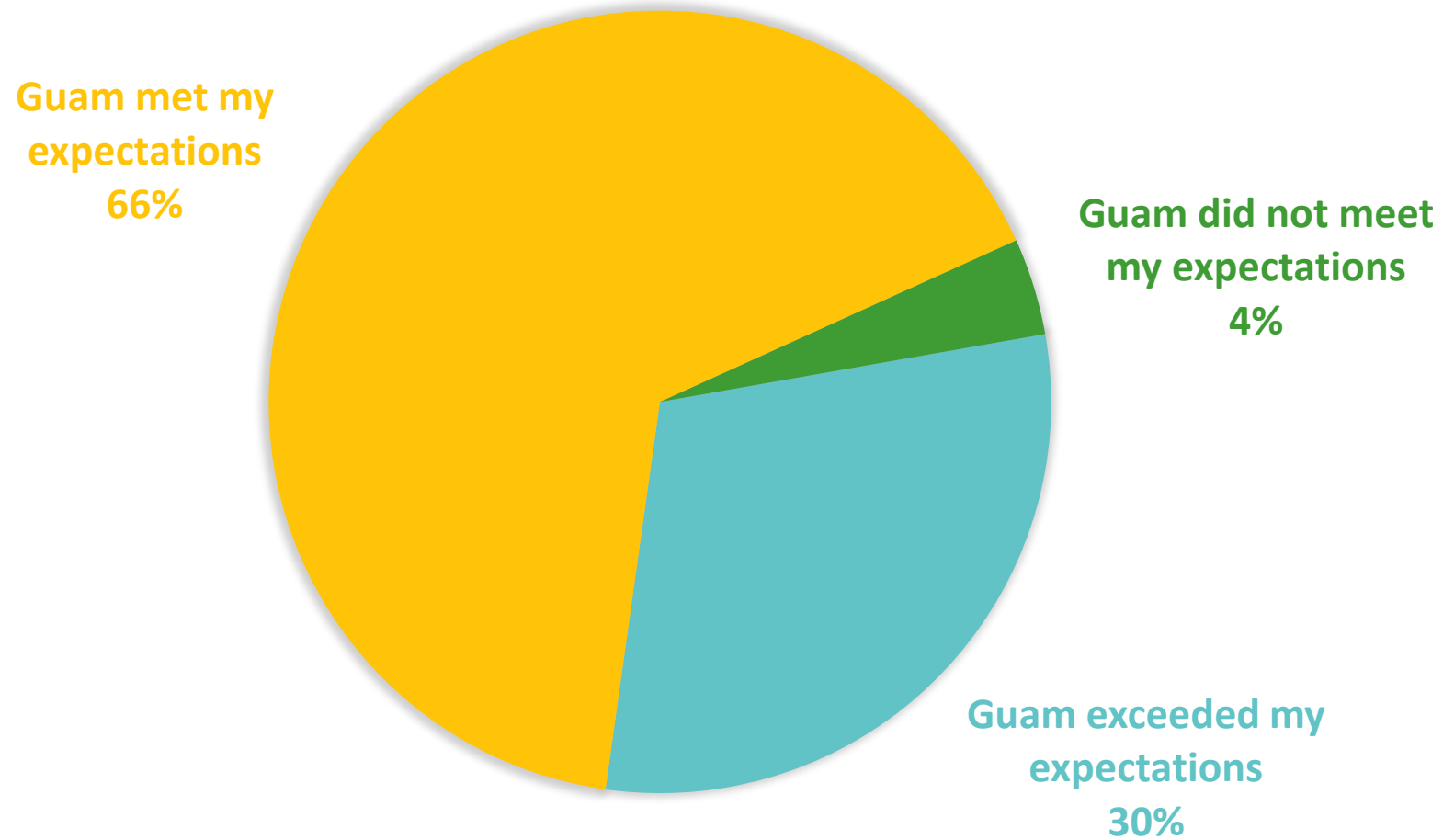
BRAND ADVOCACY



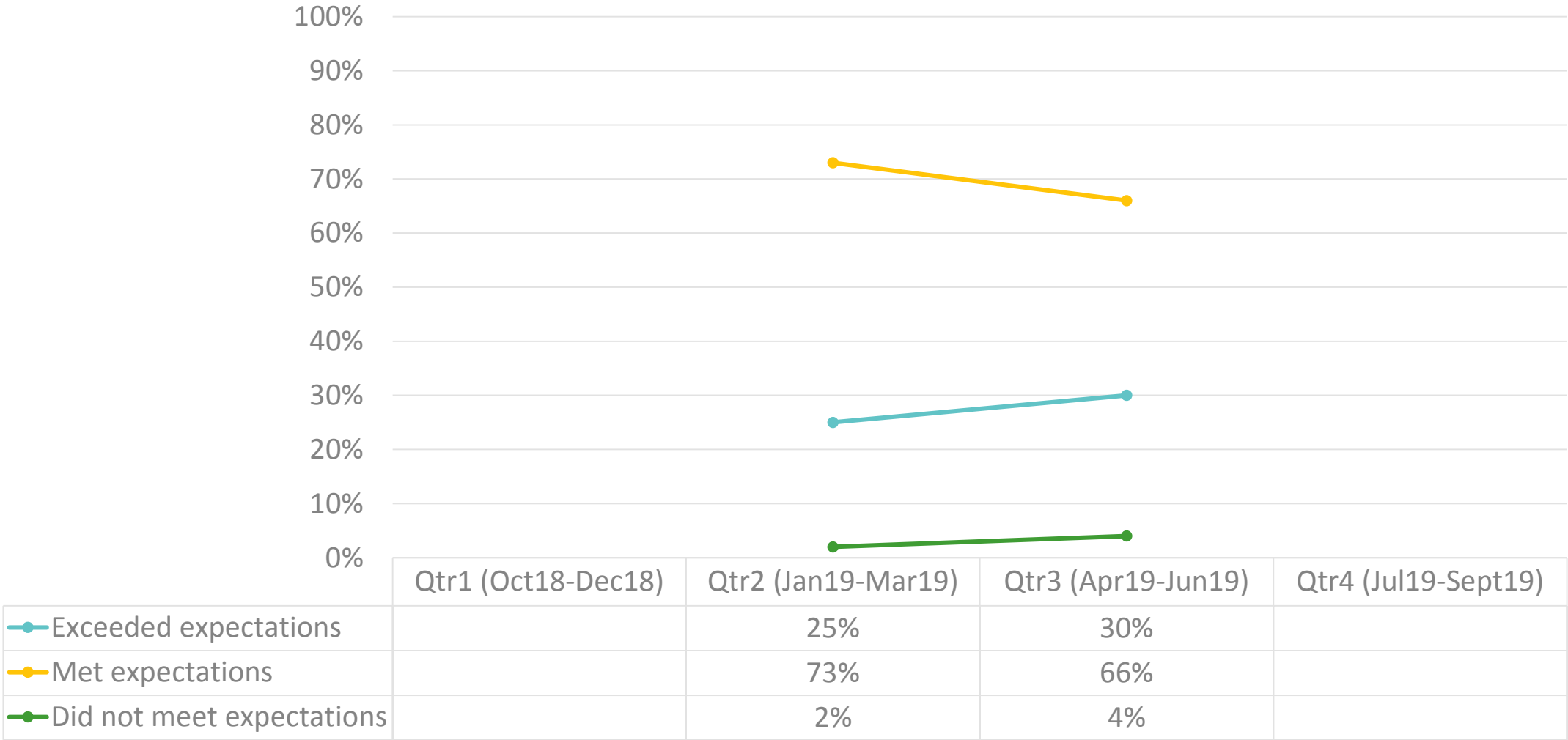
BRAND LOYALTY

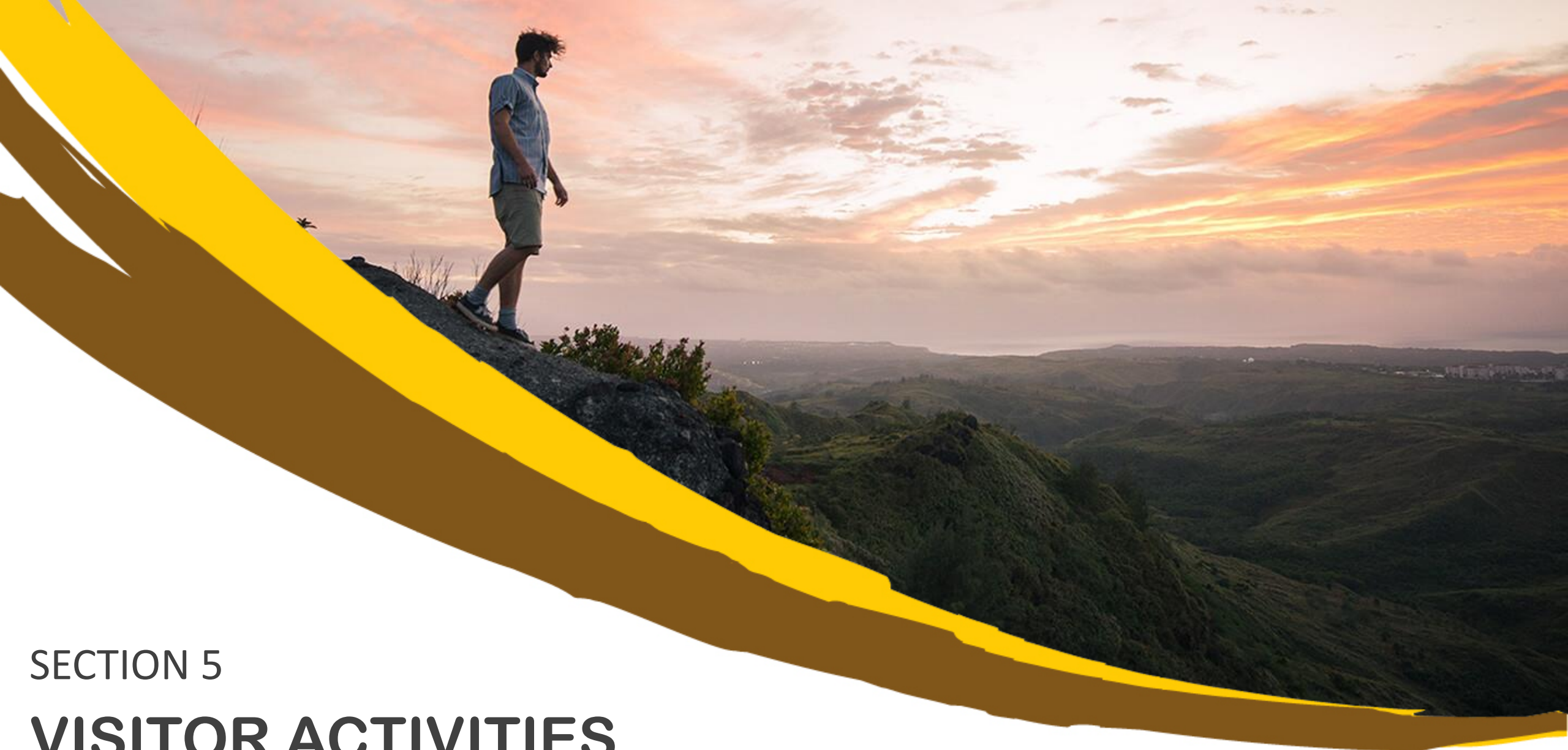


TRIP EXPECTATIONS



TRIP EXPECTATIONS – TRACKING



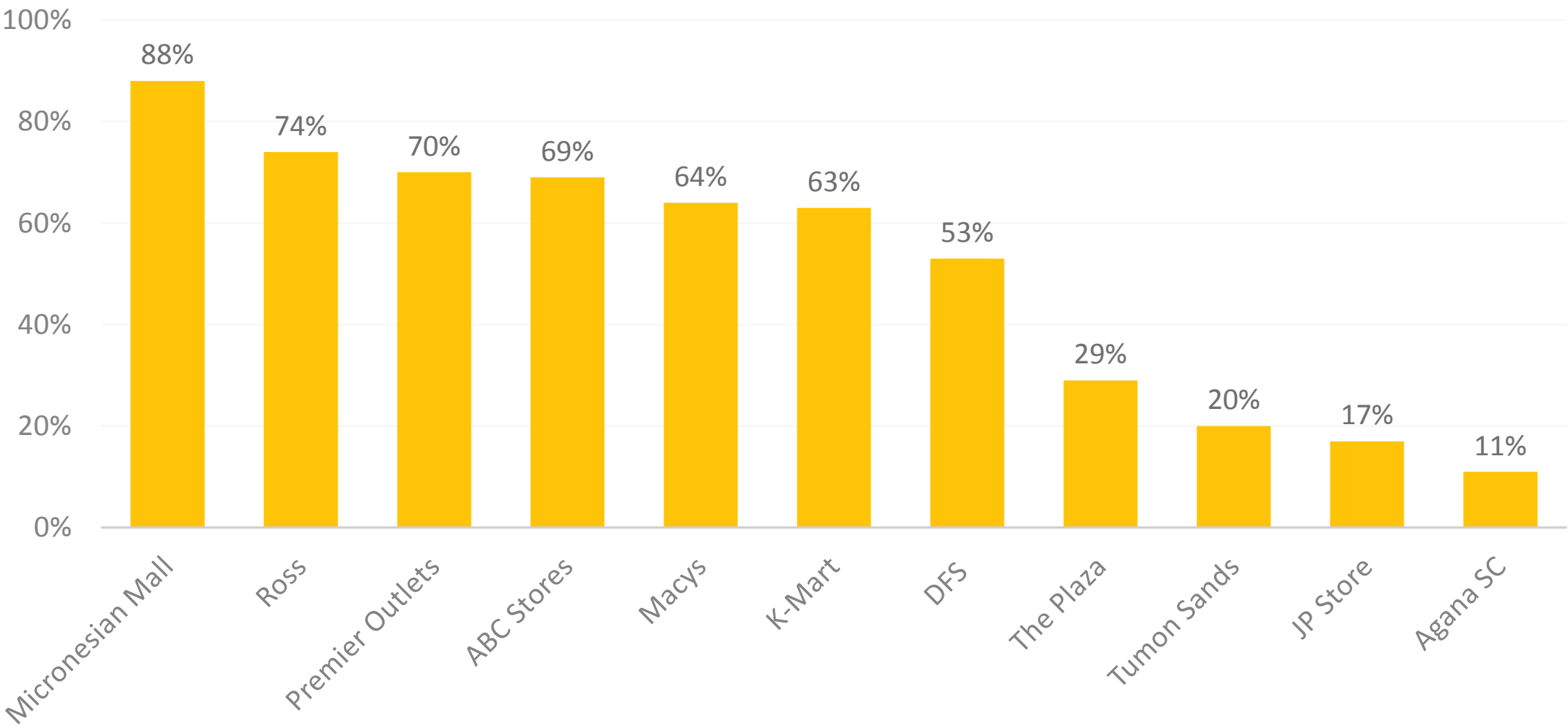


SECTION 5

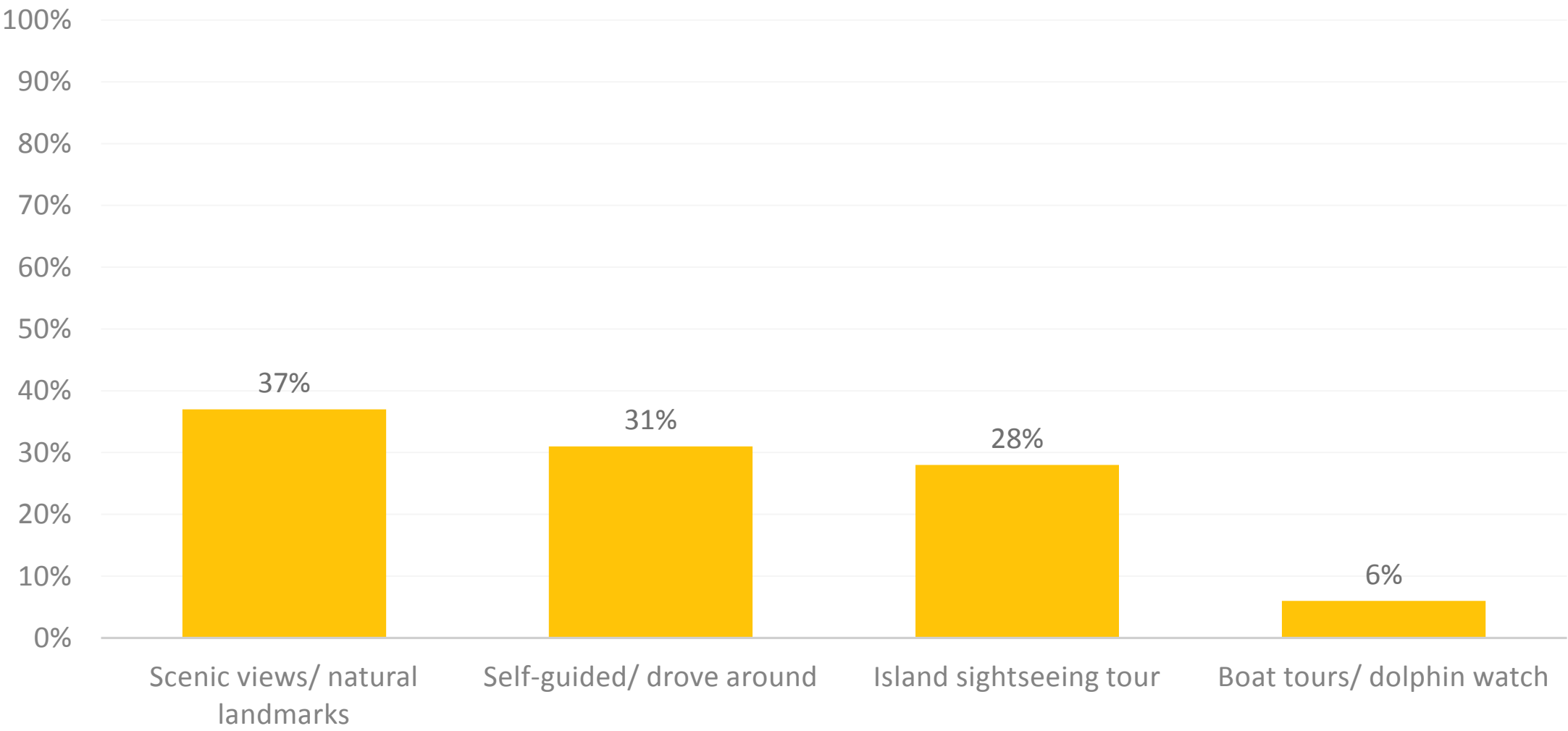
VISITOR ACTIVITIES



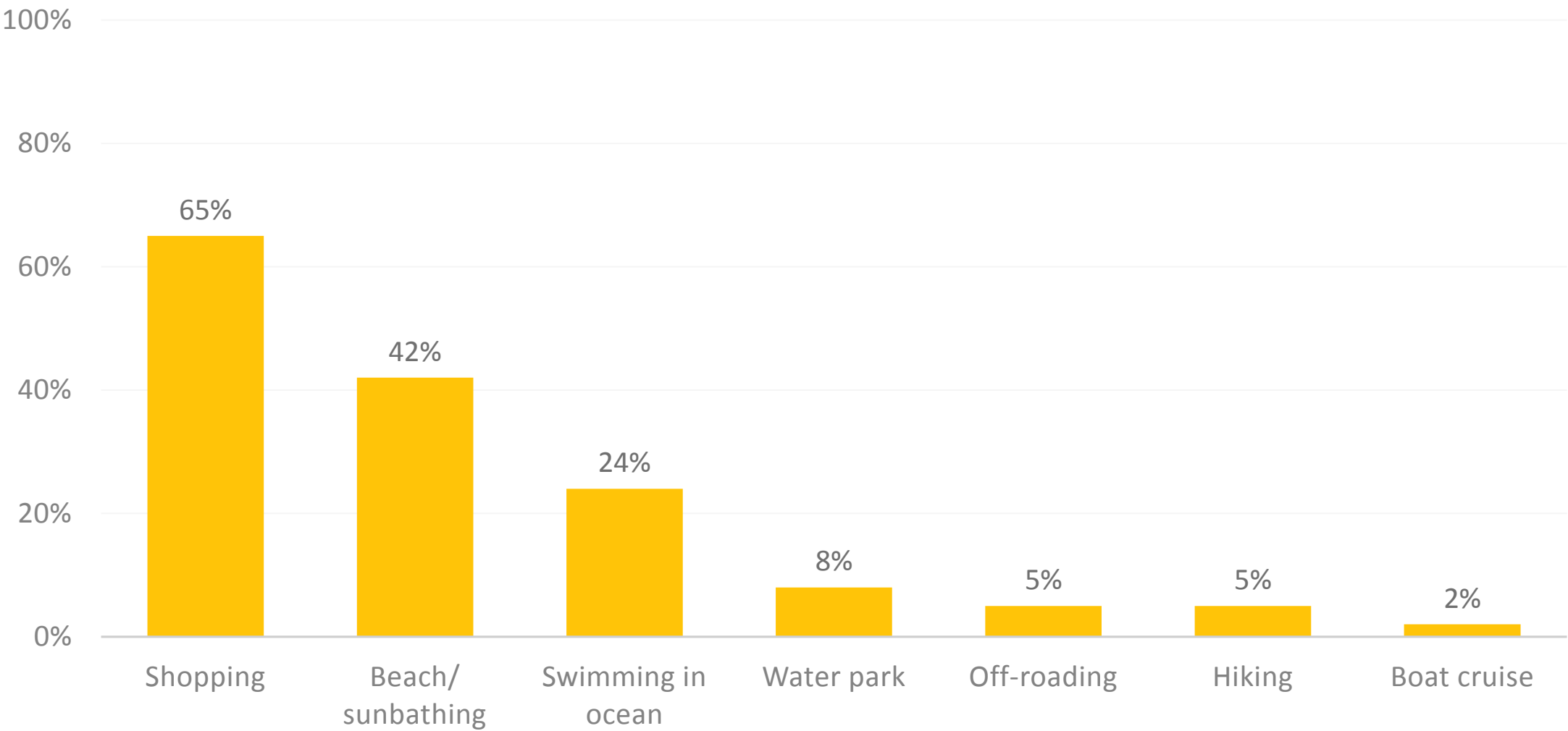
SHOPPING AREAS – PENETRATION



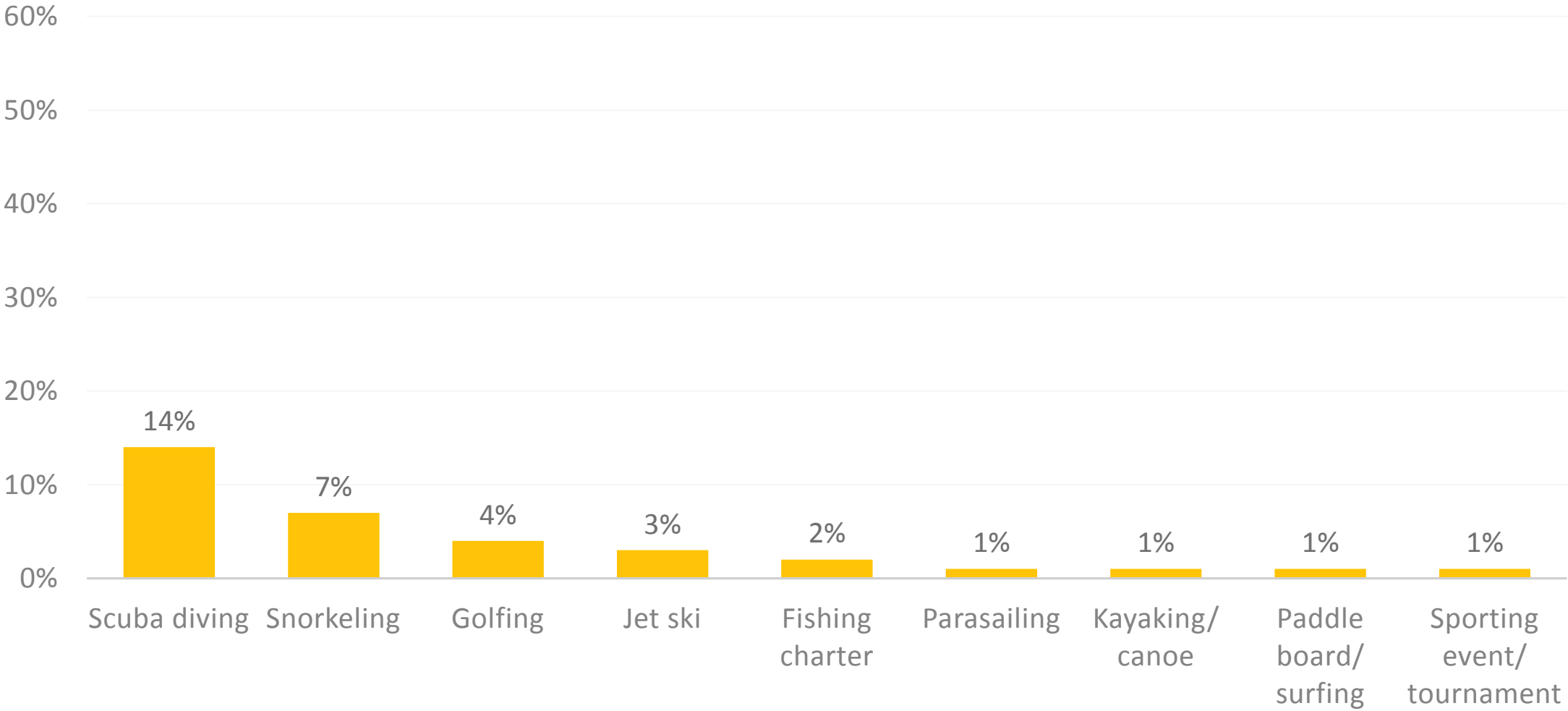
ACTIVITIES – SIGHTSEEING



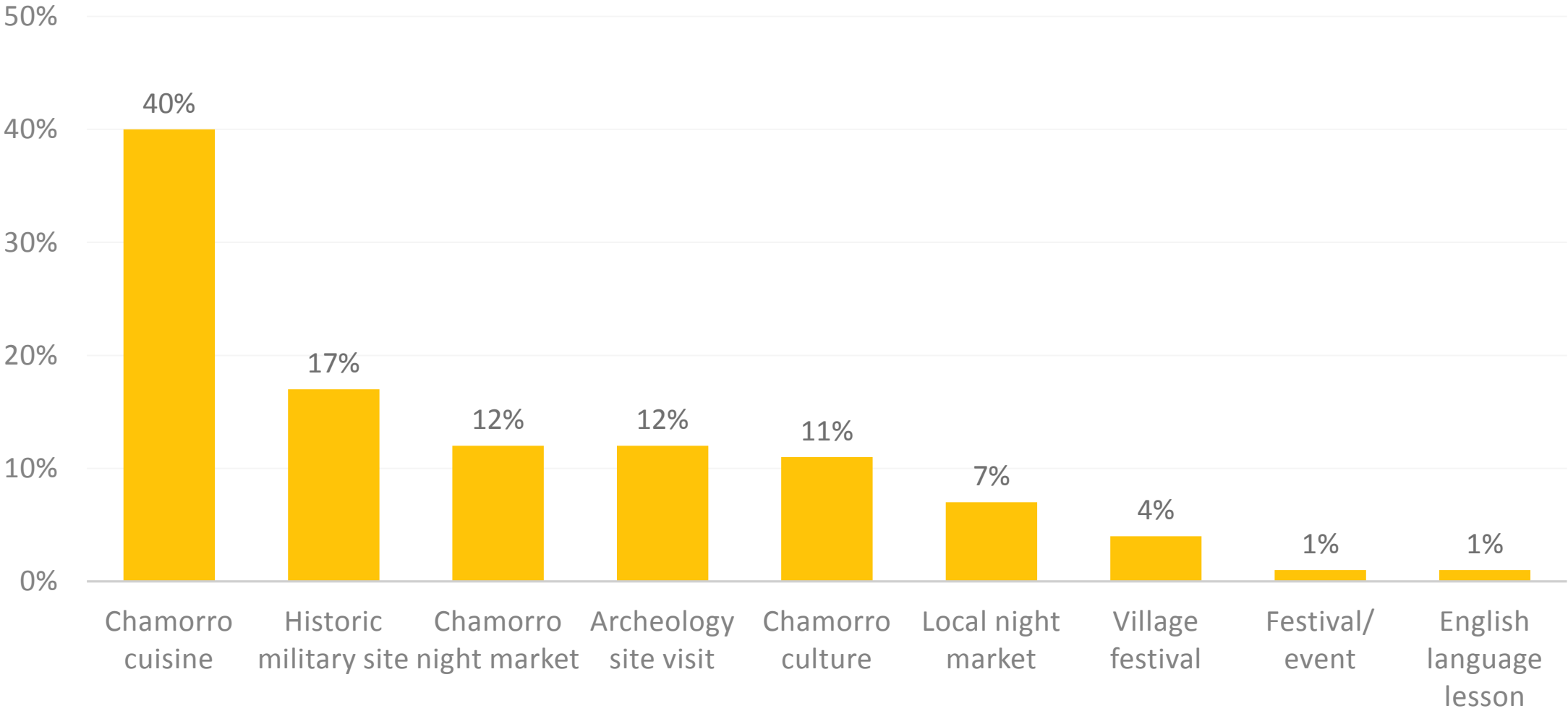
ACTIVITIES – RECREATION



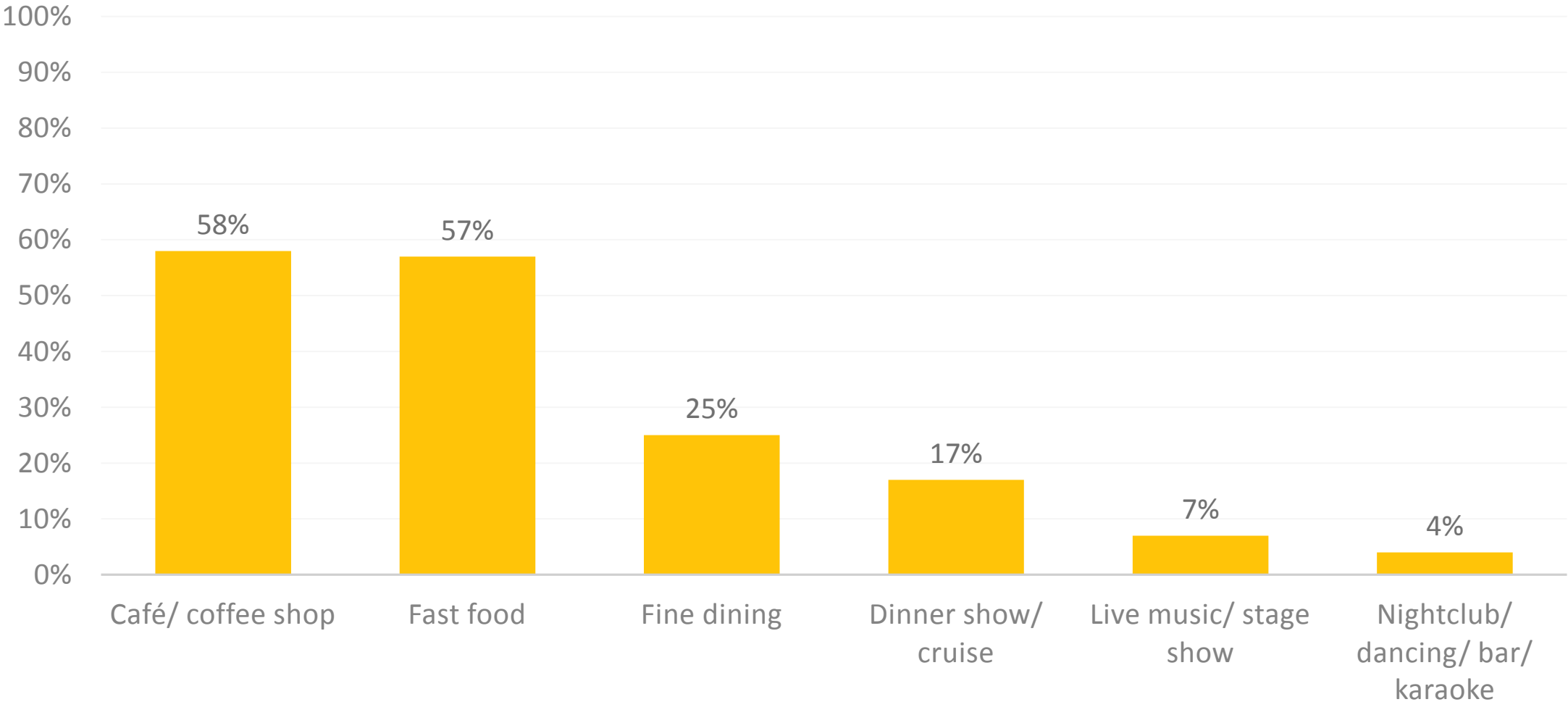
ACTIVITIES – SPORTS



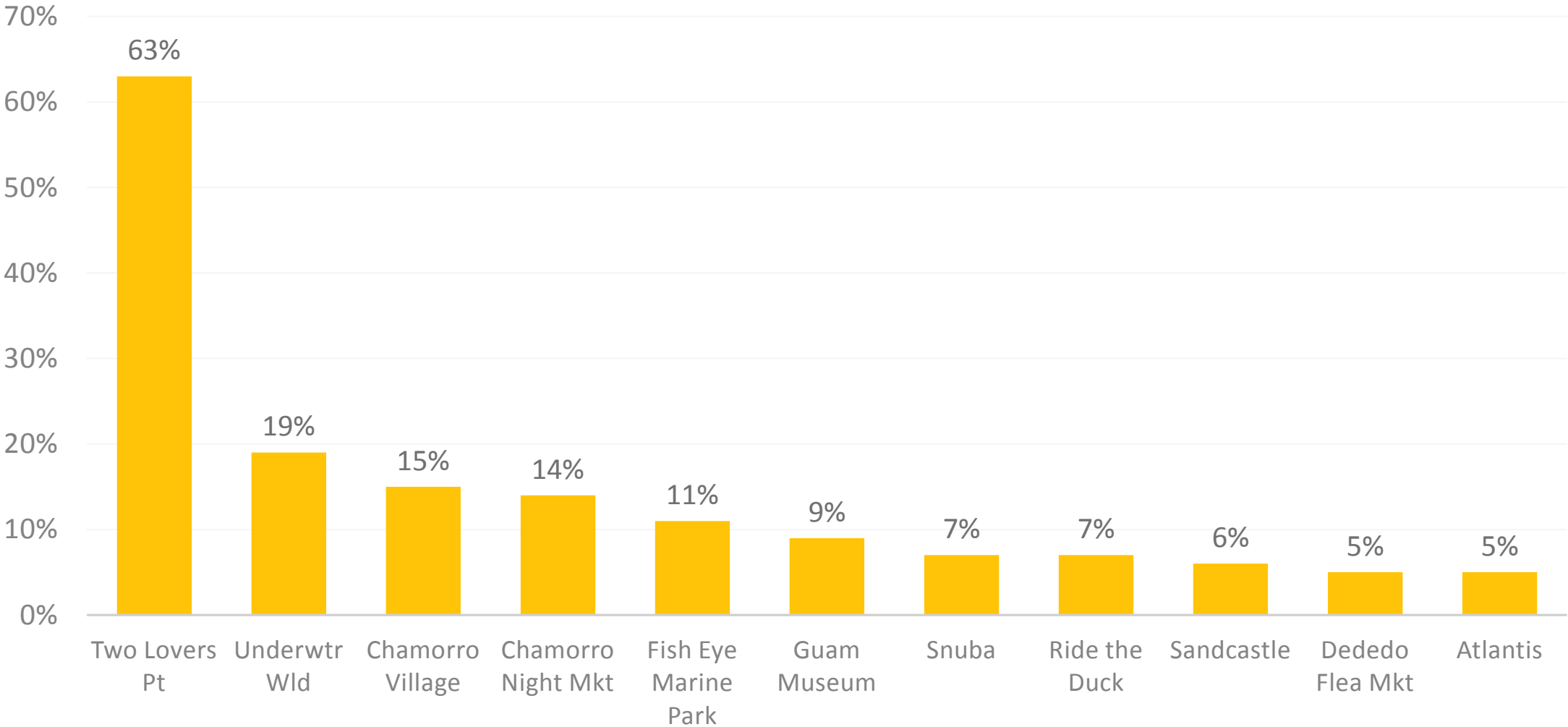
ACTIVITIES – HISTORY, CULTURE, ARTS



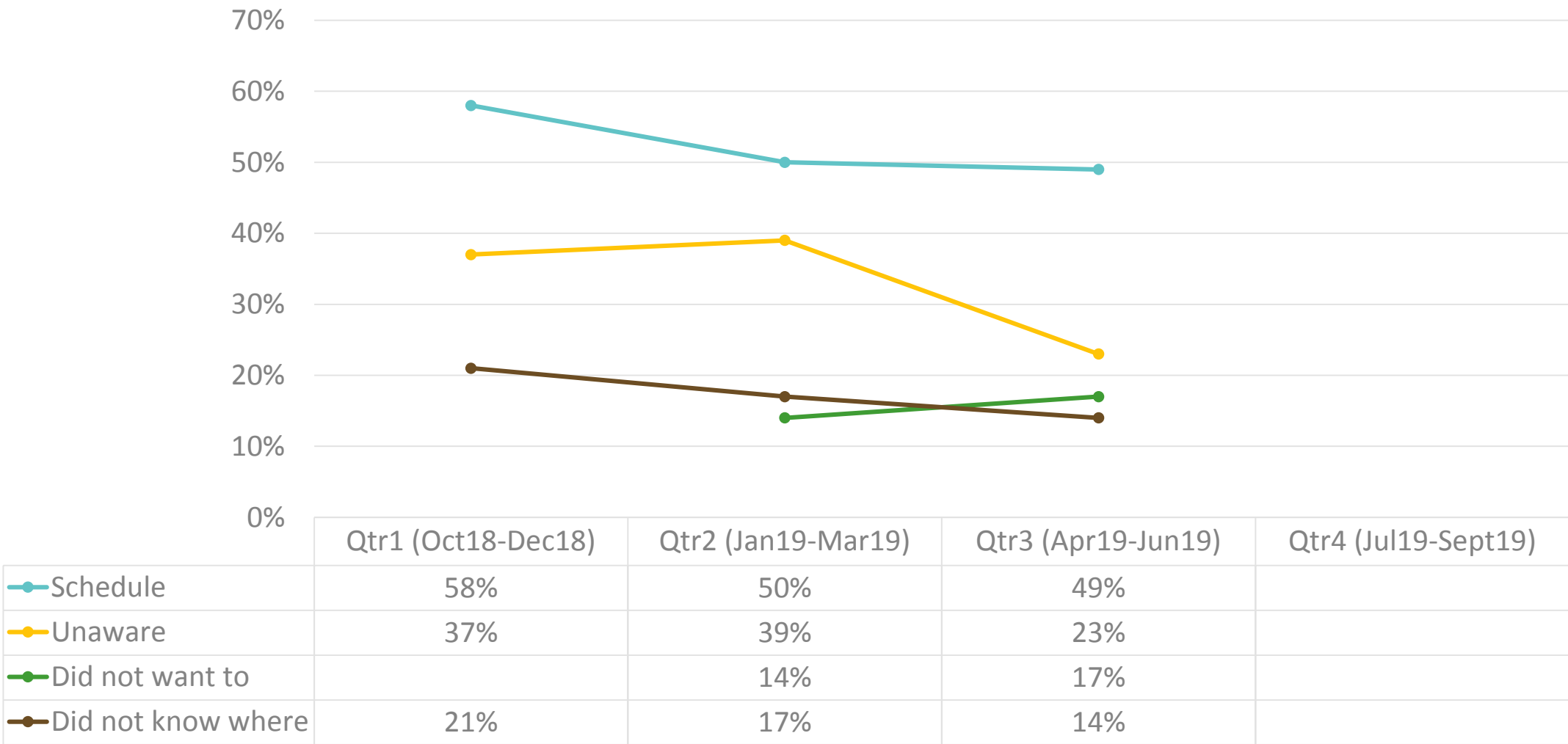
ACTIVITIES – ENTERTAINMENT & DINING



LOCAL ATTRACTIONS – TOP RESPONSES (5%+)



LOCAL CULTURE – OBSTACLES



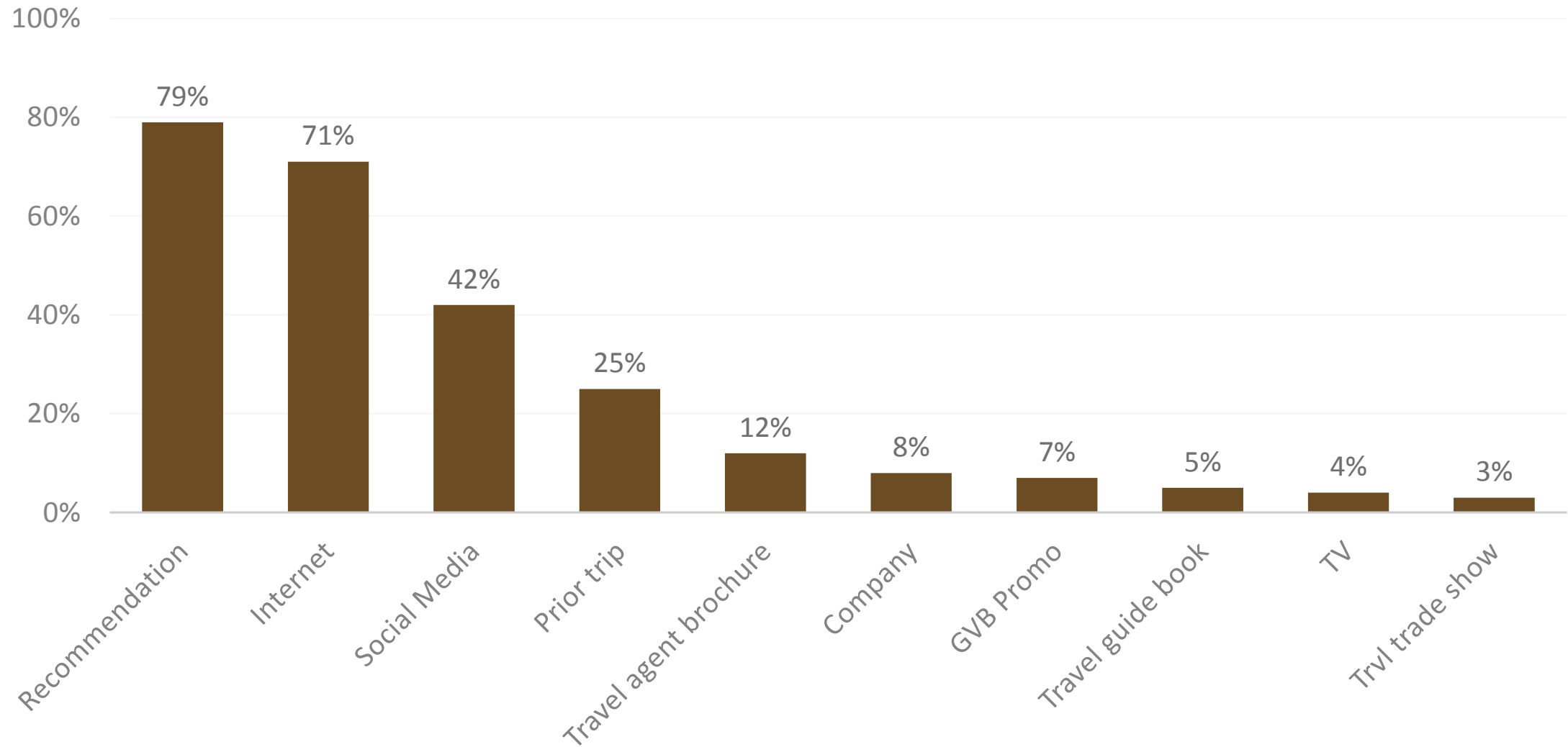


SECTION 6

SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION - SEGMENTATION

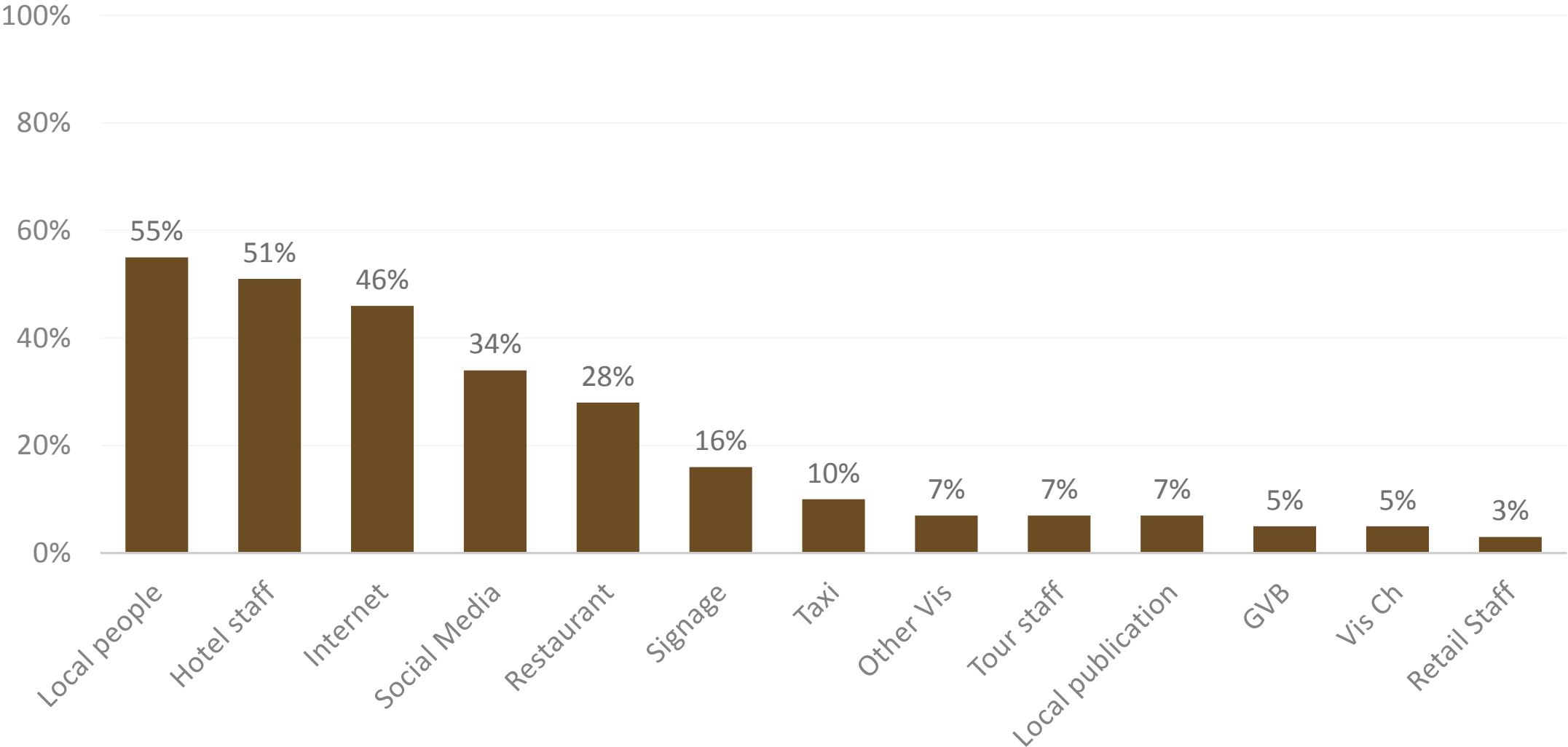
GVB VISITOR SATISFACTION STUDY

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	79%	78%	78%	67%
	Internet/Mobile App	71%	76%	71%	100%
	Social media	42%	43%	42%	
	I have been to Guam before	25%	22%	25%	67%
	Travel agent brochure	12%	11%	11%	
	Co-worker/ company travel department	8%	5%	7%	
	Guam Visitors Bureau promotional activities	7%	8%	7%	
	Travel guide book at bookstores	5%	5%	5%	
	TV	4%	3%	4%	
	Travel trade shows	3%	5%	3%	
	Radio	1%	2%	1%	
	Total	103	63	100	3

Prepared by Anthology Research

ONISLE SOURCES OF INFORMATION



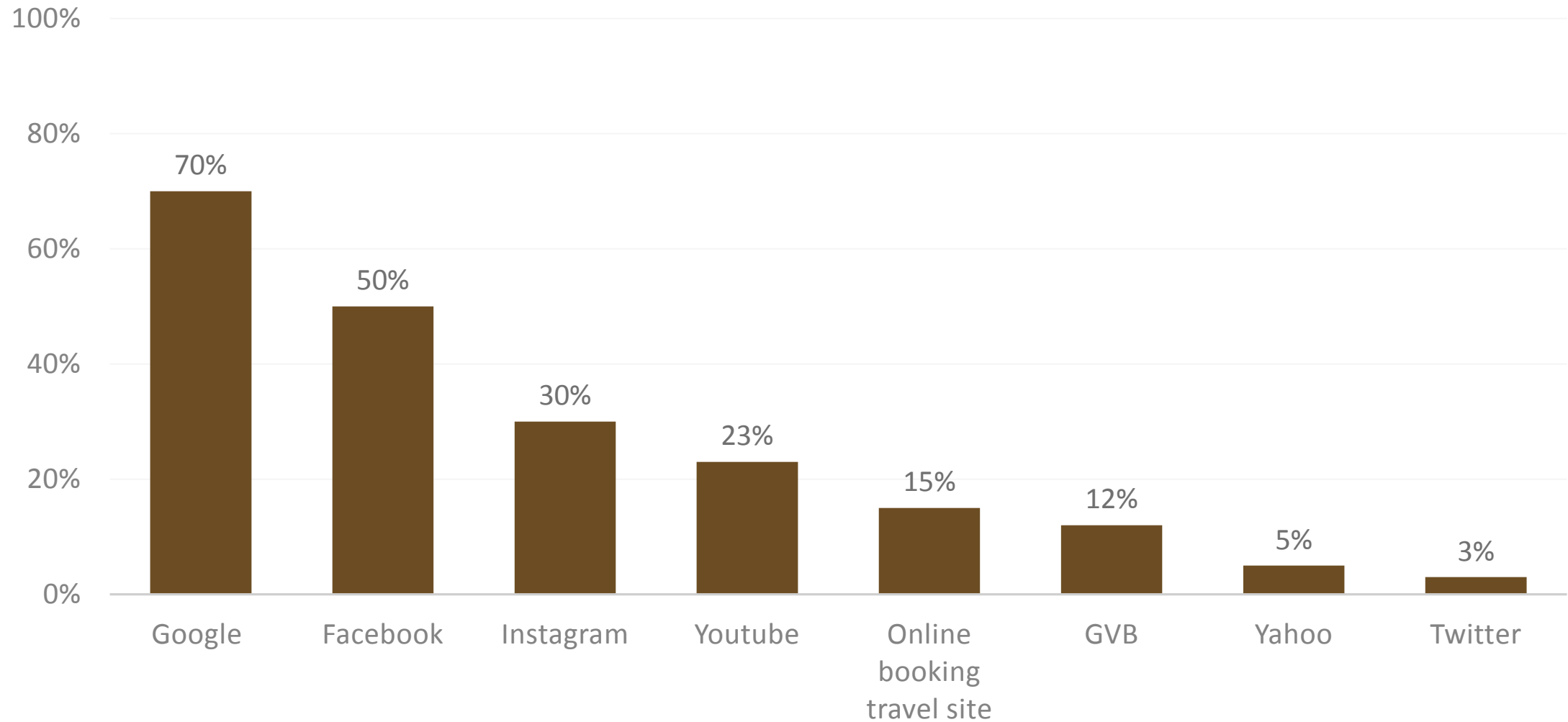
ONISLE SOURCES OF INFORMATION

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

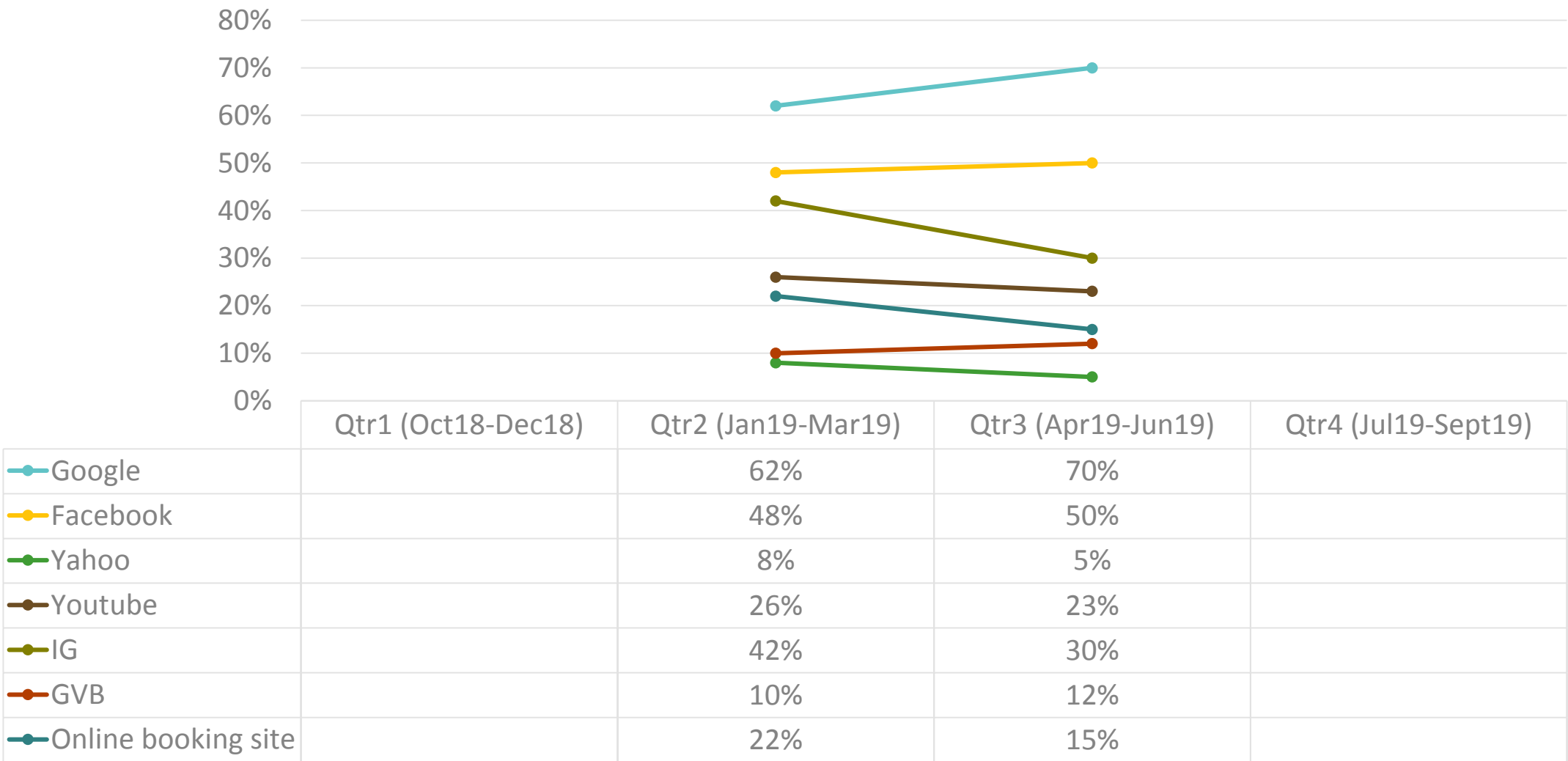
	TOTAL	FAMILY	FIT	MICE
	-	-	-	-
Q6 Local people	55%	54%	55%	100%
Hotel staff	51%	46%	53%	33%
Internet/ Mobile App	46%	51%	46%	33%
Social Media	34%	37%	34%	
Restaurant staff (outside hotel)	28%	29%	28%	
Signs/ advertisement	16%	16%	15%	33%
Taxi drivers	10%	8%	10%	33%
Tour staff	7%	10%	5%	
Local publication	7%	2%	7%	
Other visitors	7%	6%	7%	
Visitors channel	5%	5%	5%	
Guam Visitors Bureau	5%	6%	5%	
Retail staff	3%	2%	3%	
Guide books I brought with me	1%		1%	
Total	103	63	100	3

Prepared by Anthology Research

ONLINE SOURCES OF INFORMATION



ONLINE SOURCES OF INFORMATION



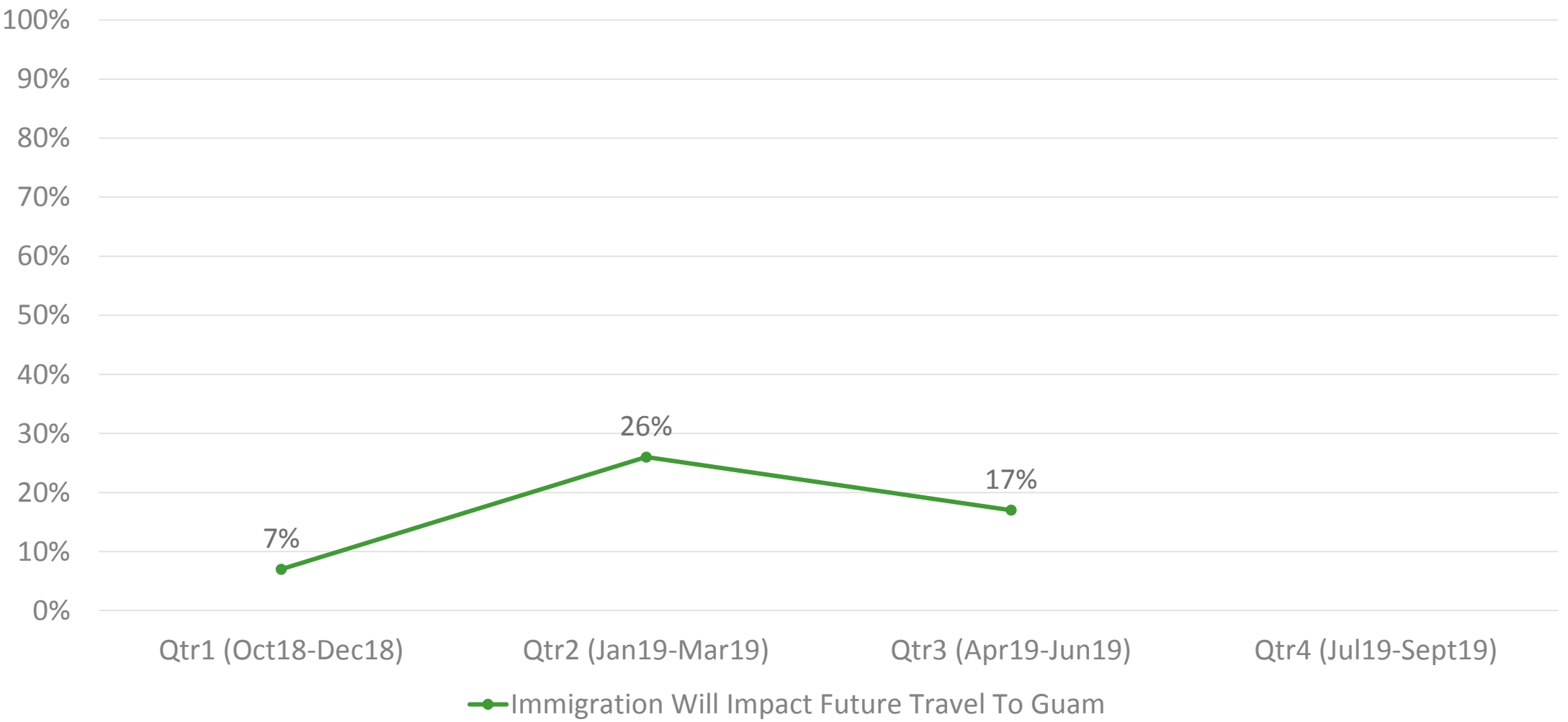


SECTION 7

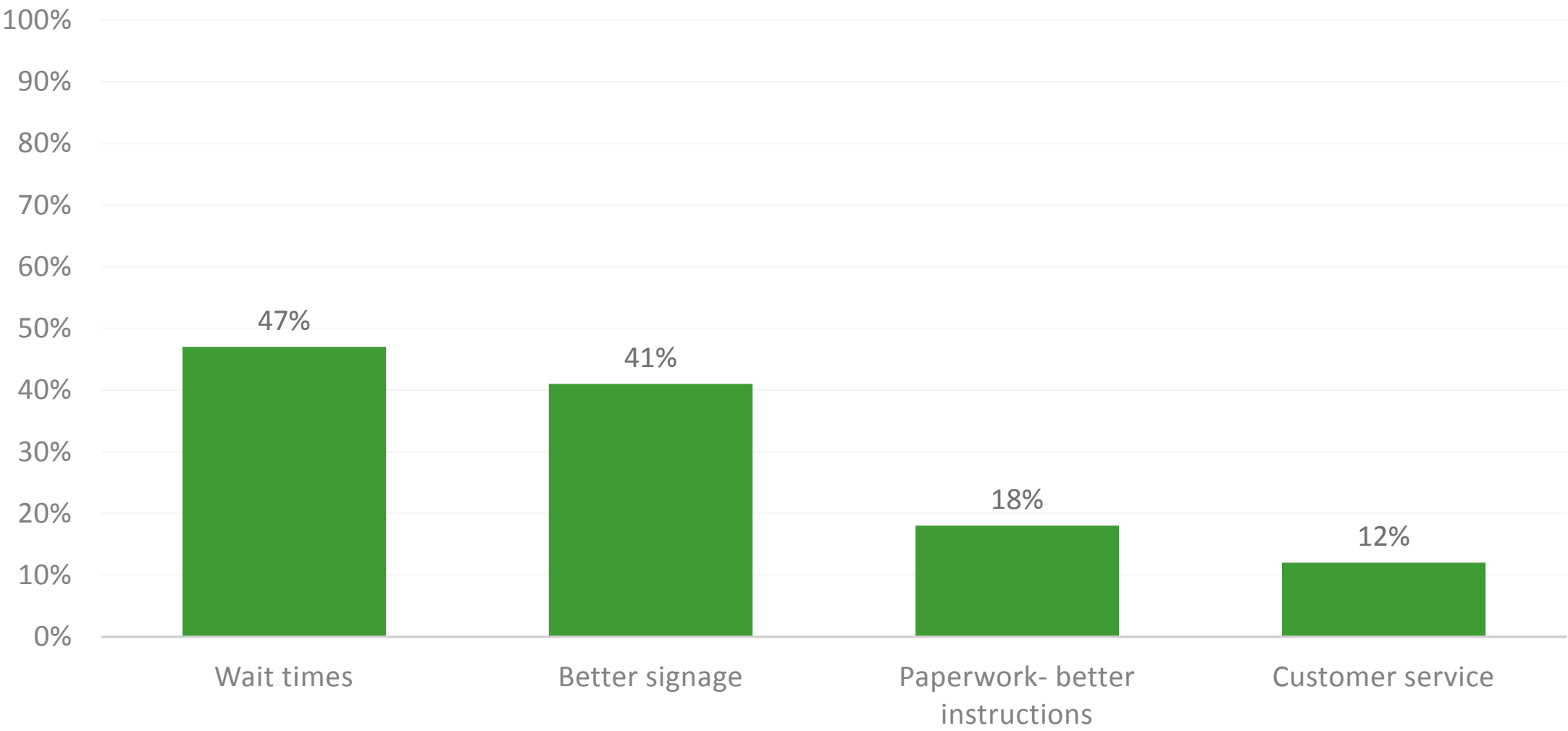
IMMIGRATION



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 ($p \leq .05$) 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, 2-3 Qtr. 2019			
	2nd Qtr 2019	3rd Qtr. 2019	Combined 2-3 Qtr. 2019
Drivers:	rank	rank	rank
Entertainment			1
Shopping			
Dining			
Beaches			
Parks			
Roads			
Sightseeing Areas	1	1	
Being a safe and secure destination			
% of Overall Satisfaction Accounted For:	4.2%	4.9%	10.2%
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 3rd Quarter 2019 Period. It is:
 - **Sightseeing areas**
- With this factor, the overall r^2 is .049 meaning that **4.9% of overall satisfaction is accounted for by this factor.**

DRIVERS – ONISLE EXPENDITURES

Comparison of Drivers of Per Person On Island Expenditures, 2-3 Qtr. 2019

	2nd Qtr. 2019	3rd Qtr. 2019	Combined 2-3 Qtr. 2019
Drivers:	rank	rank	rank
Entertainment	1	1	
Shopping			
Dining			
Beaches			
Parks			
Roads			
Sightseeing Areas			1
Being a safe and secure destination			
% of Overall Satisfaction Accounted For:	10.3%	10.2%	4.9%
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 3rd Quarter 2019 Period. It is:
 - **Entertainment**
- With this factor, the overall r^2 is .102 meaning that **10.2% of per person on island expenditure is accounted for by this factor.**