



Guam Visitors Bureau

Philippine Visitor Tracker Exit Profile & Market Segmentation Report

FY2019 - QTR.4 (JUL-SEPT 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 102 departing Filipino visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of 102 is +/- 9.80 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 +/- 9.80 percentage points.

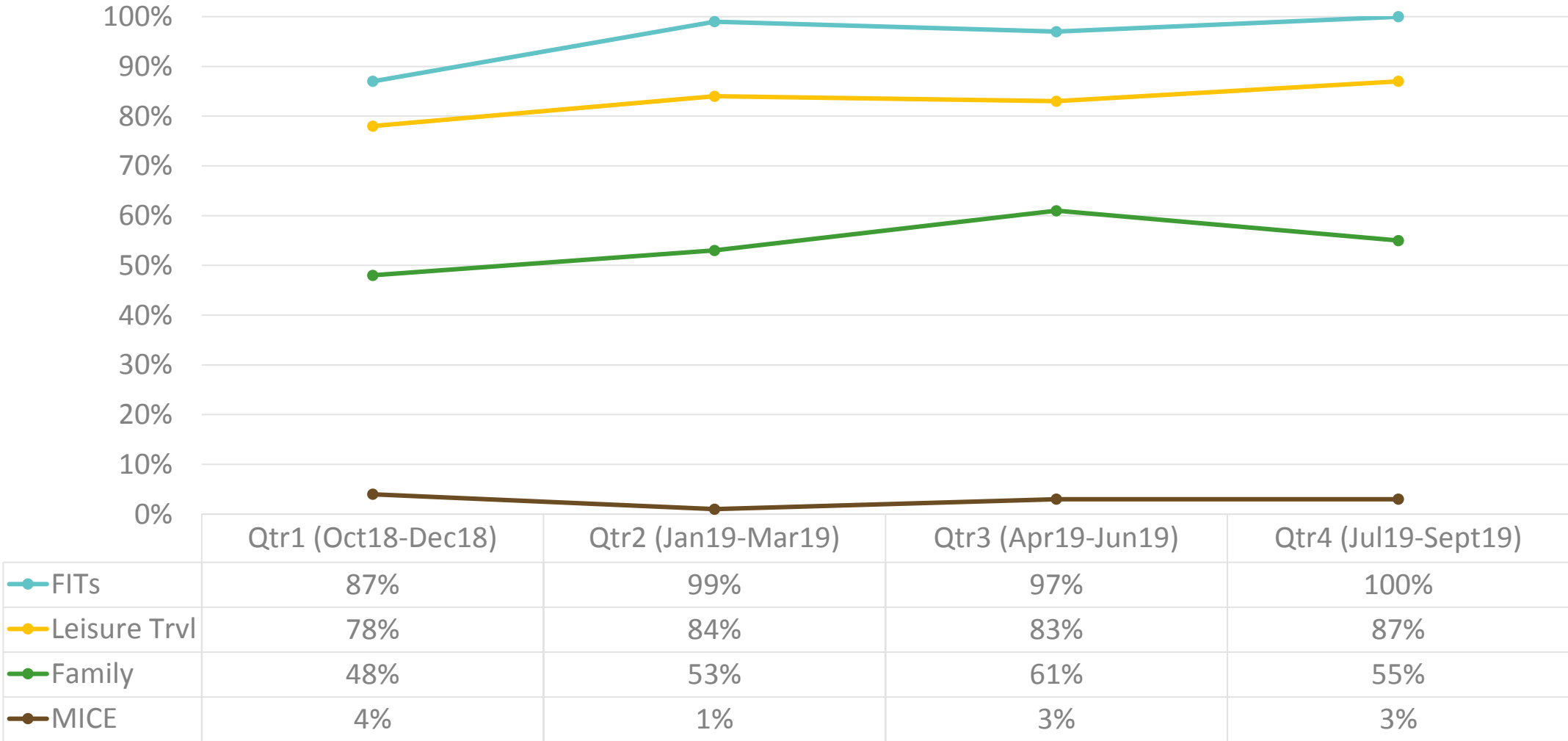
Objectives

- 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



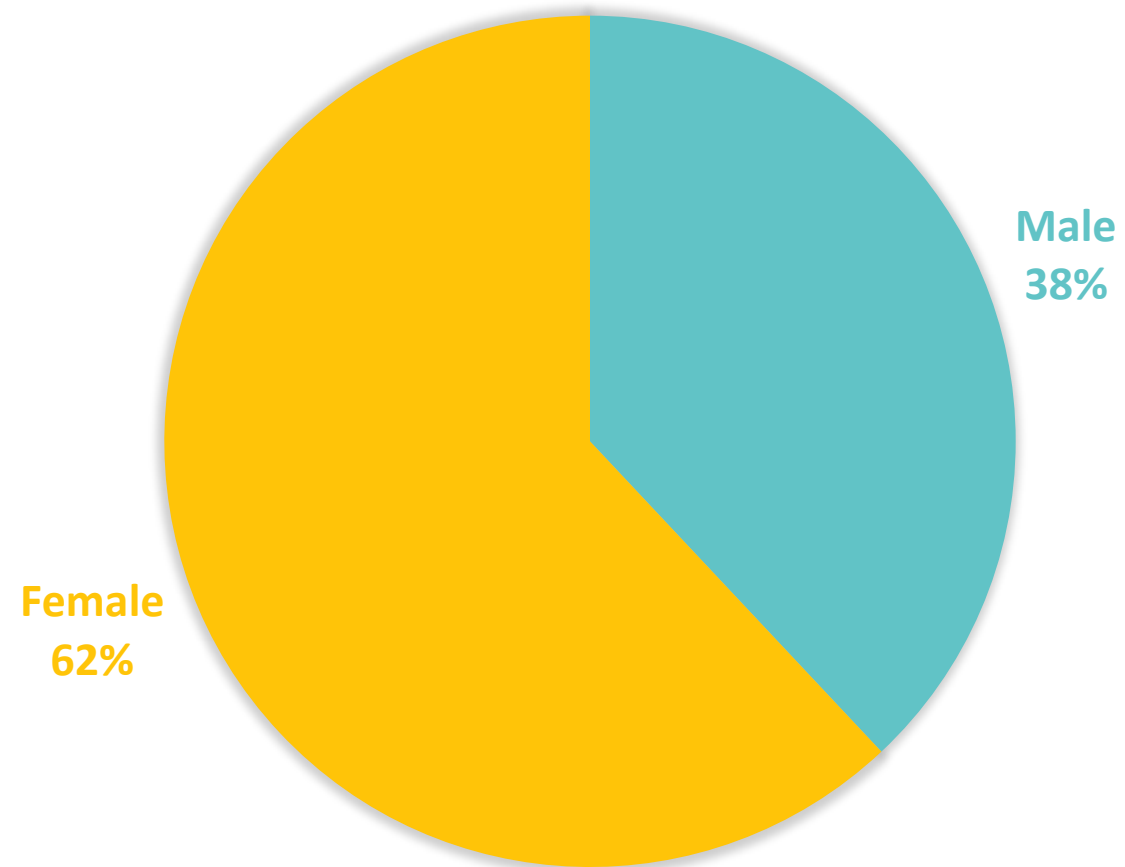


SECTION 1

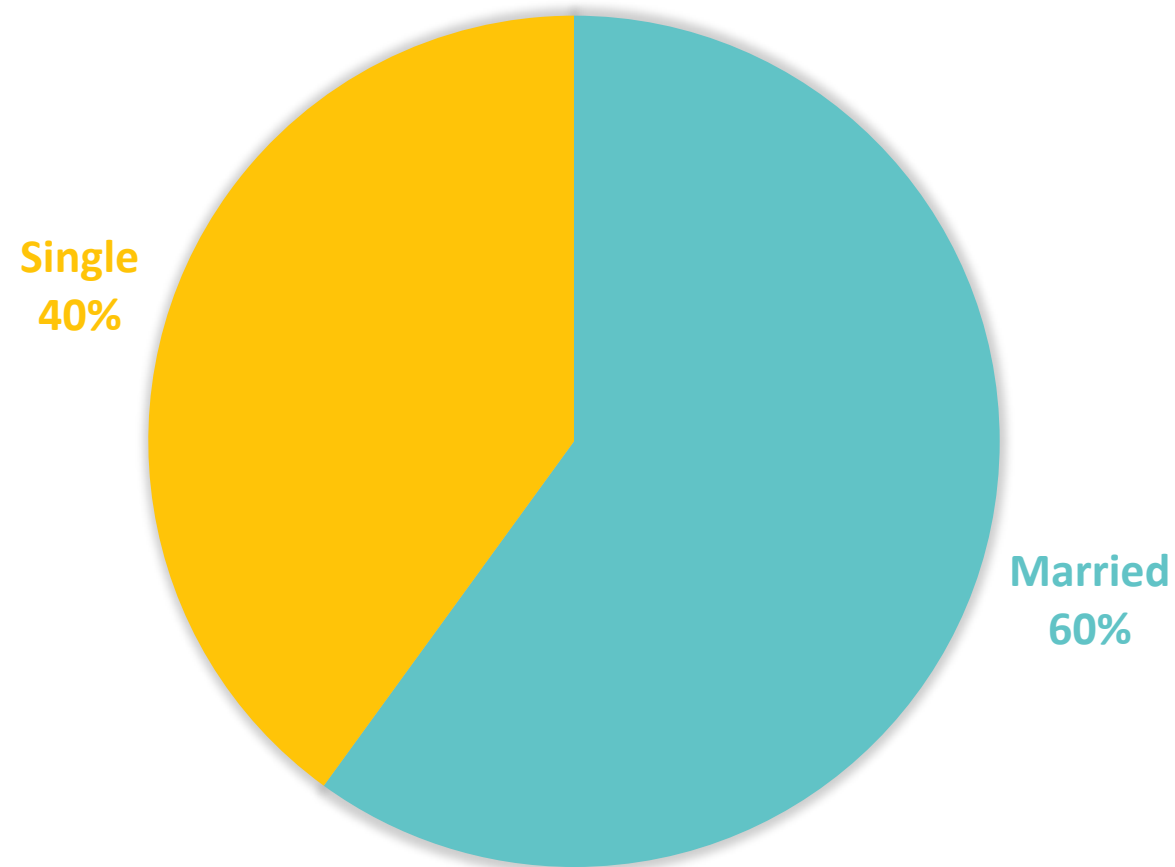
PROFILE OF RESPONDENTS



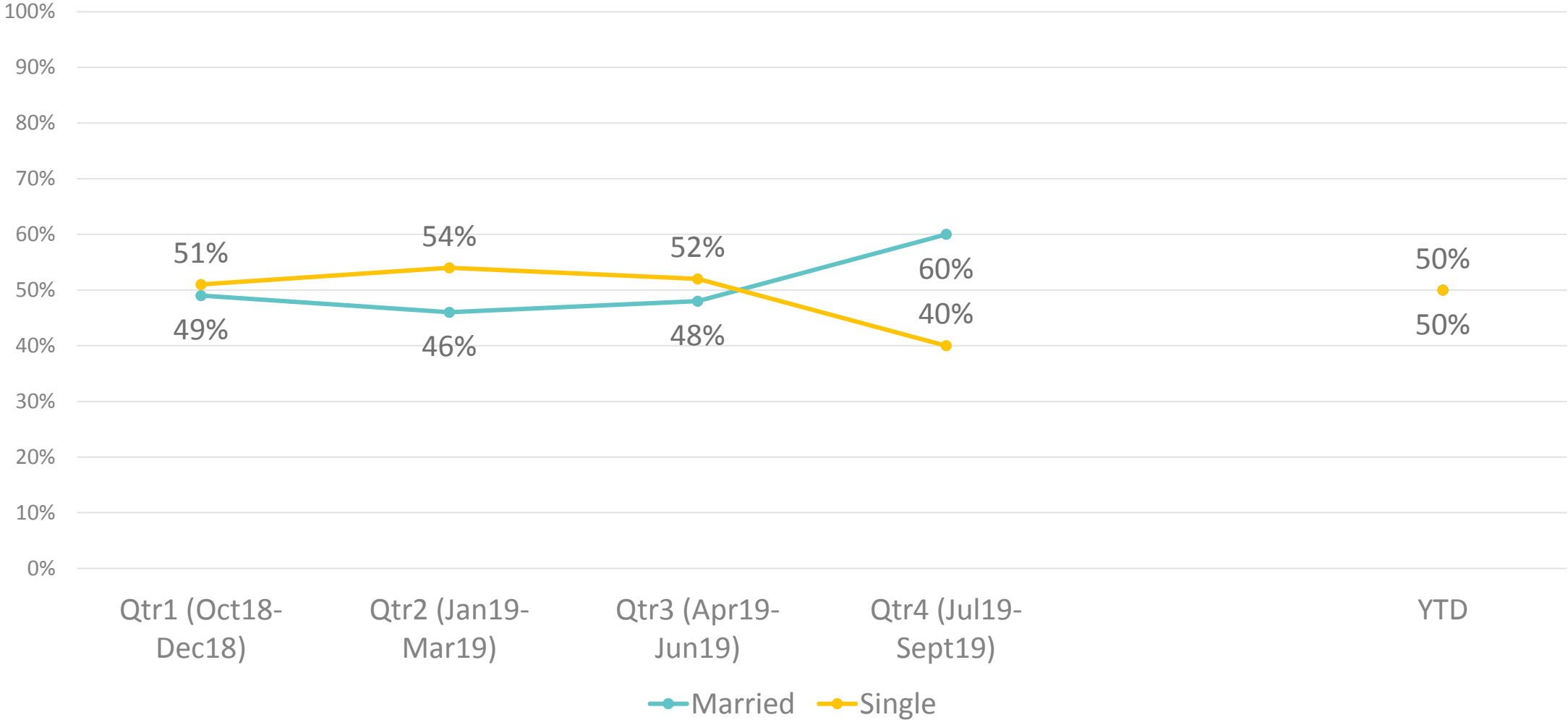
GENDER



MARITAL STATUS



MARITAL STATUS – TRACKING



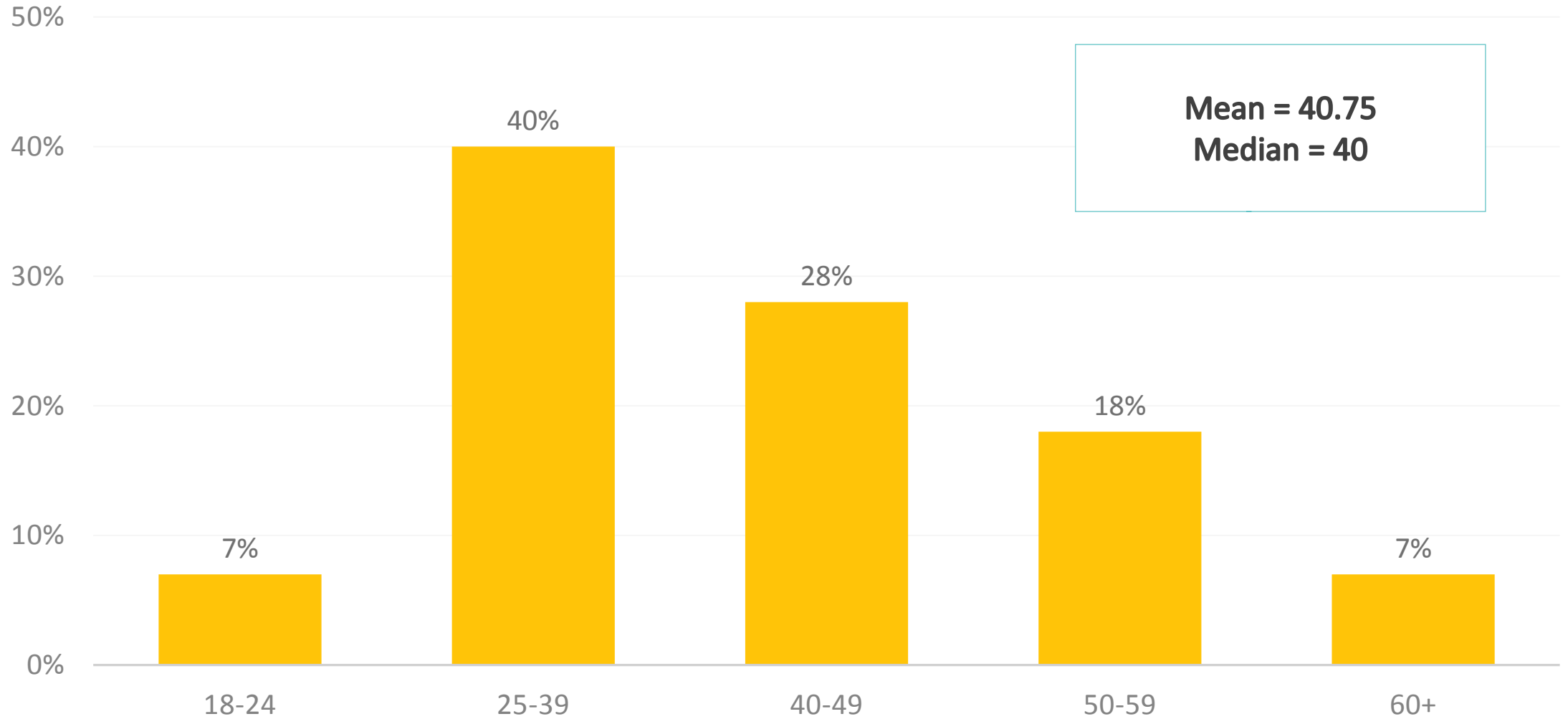
MARITAL STATUS – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
QE Are you married or single?

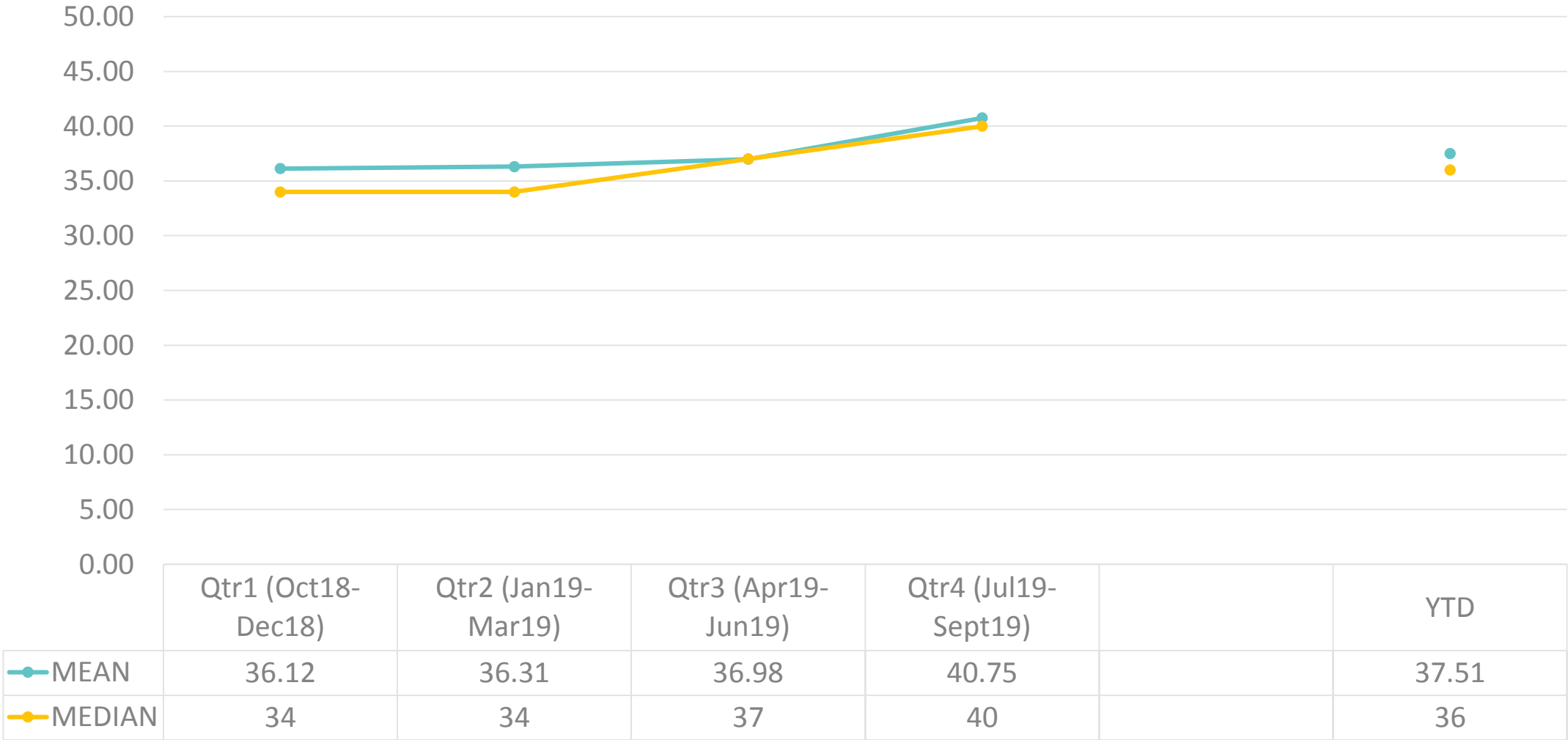
| | | TOTAL | FAMILY | FIT | MICE | LEISURE |
|----|---------|-------|--------|-----|------|---------|
| | | - | - | - | - | - |
| QE | Married | 60% | 77% | 60% | 100% | 58% |
| | Single | 40% | 23% | 40% | | 42% |
| | Total | 102 | 56 | 102 | 3 | 89 |

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AGE



AGE – TRACKING



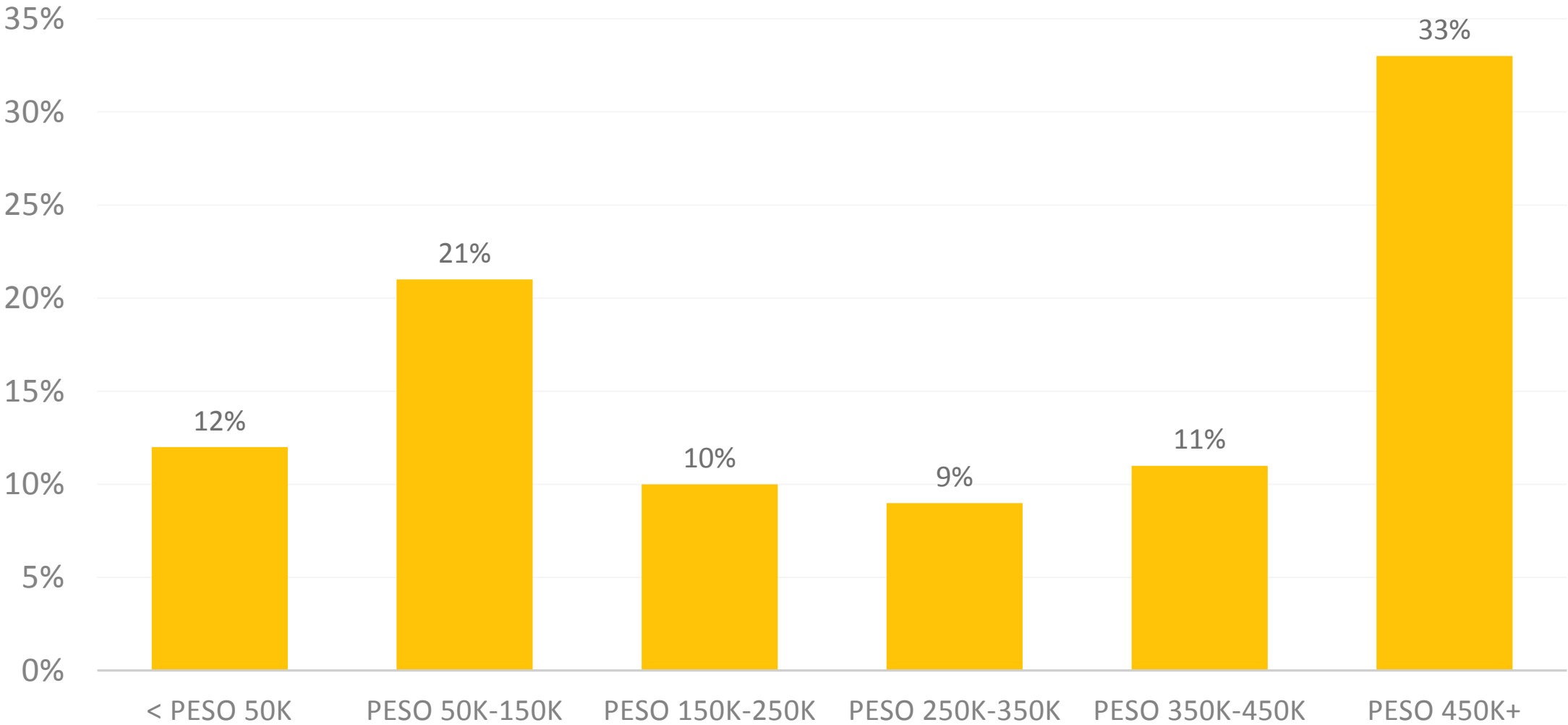
AGE – SEGMENTATION

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

| | | TOTAL | FAMILY | FIT | MICE | LEISURE |
|----|--------|-------|--------|-------|-------|---------|
| | | - | - | - | - | - |
| QF | 18-24 | 7% | 9% | 7% | | 7% |
| | 25-39 | 40% | 36% | 40% | 67% | 42% |
| | 40-49 | 28% | 30% | 28% | | 29% |
| | 50-59 | 18% | 18% | 18% | 33% | 17% |
| | 60+ | 7% | 7% | 7% | | 6% |
| | Total | 102 | 56 | 102 | 3 | 89 |
| QF | Mean | 40.75 | 40.54 | 40.75 | 41.00 | 40.20 |
| | Median | 40 | 40 | 40 | 35 | 40 |

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HOUSEHOLD INCOME



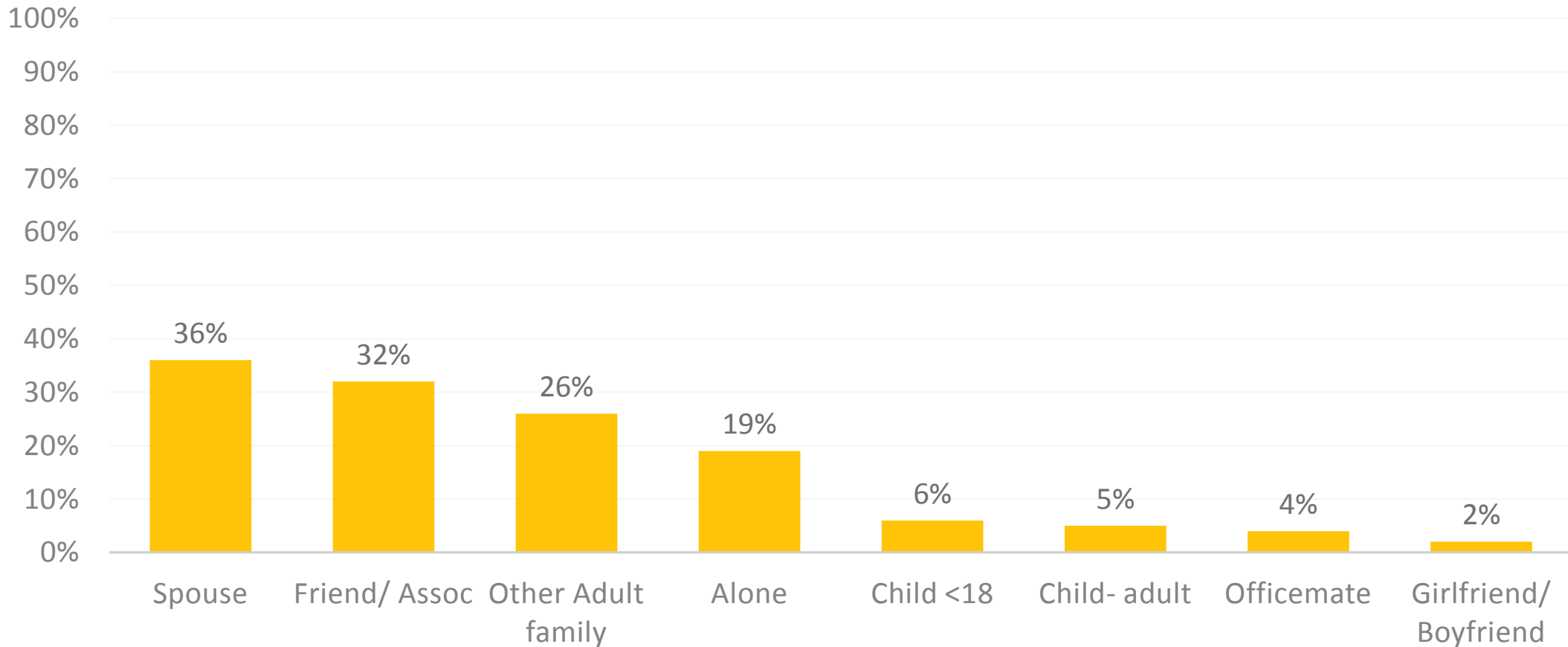
HOUSEHOLD INCOME – SEGMENTATION

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

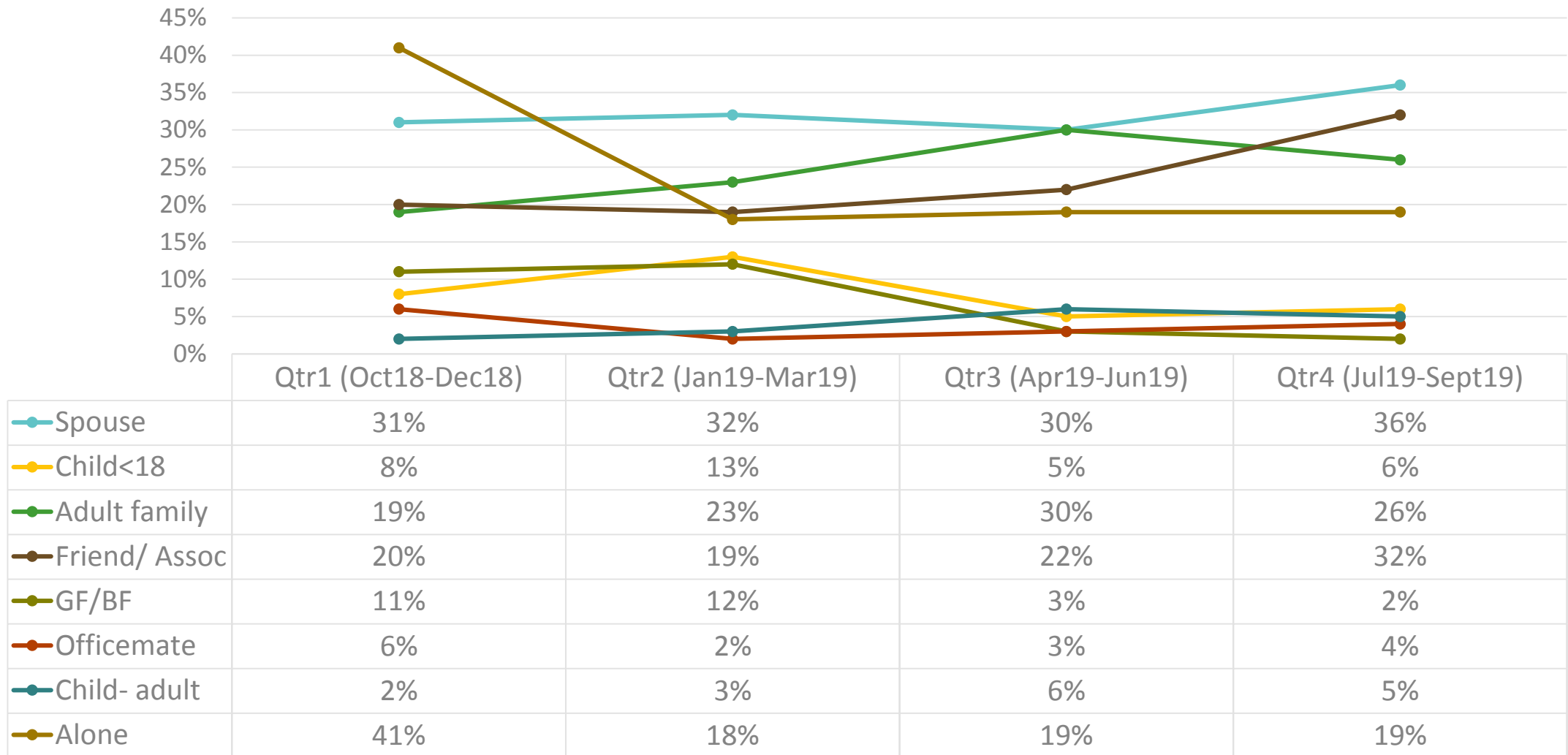
| | | TOTAL | FAMILY | FIT | MICE | LEISURE |
|----|----------------|-------|--------|-----|------|---------|
| | | - | - | - | - | - |
| D2 | < PESO 50K | 12% | 7% | 12% | | 12% |
| | PESO 50K-150K | 21% | 16% | 21% | | 19% |
| | PESO 150K-250K | 10% | 9% | 10% | | 11% |
| | PESO 250K-350K | 9% | 13% | 9% | | 8% |
| | PESO 350K-450K | 11% | 7% | 11% | 33% | 11% |
| | PESO 450K+ | 33% | 43% | 33% | 67% | 34% |
| | No income | 5% | 5% | 5% | | 4% |
| | Total | 102 | 56 | 102 | 3 | 89 |

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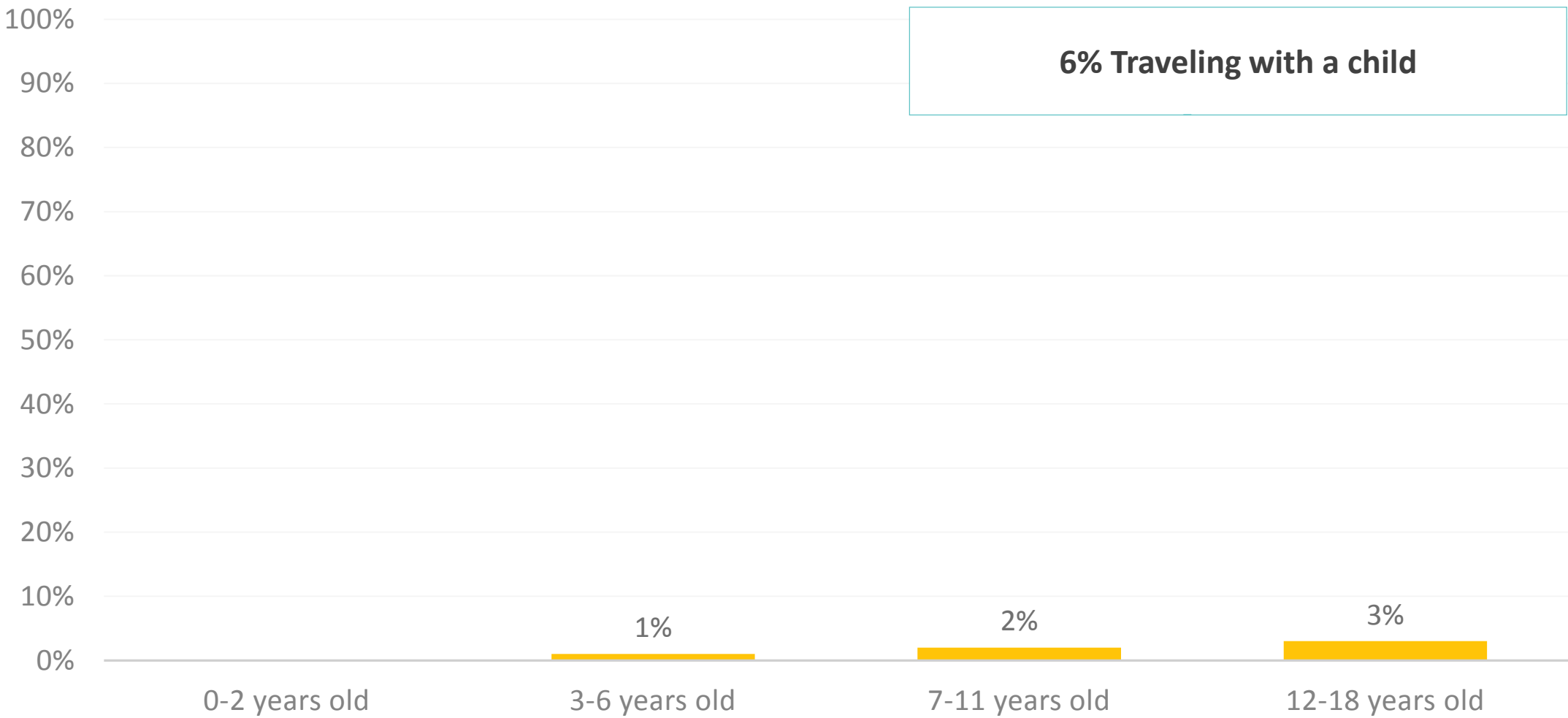
TRAVEL PARTY



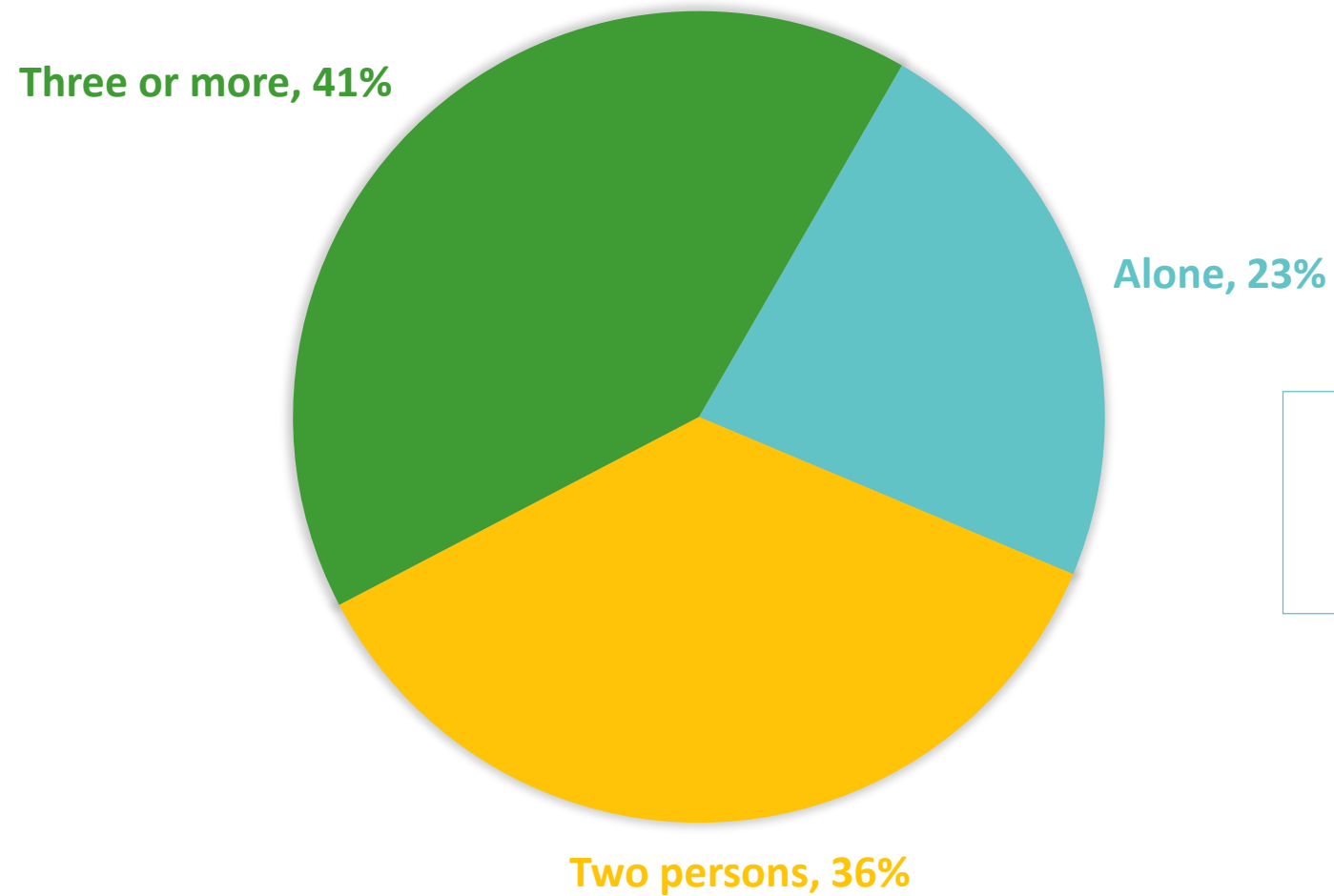
TRAVEL PARTY – TRACKING



TRAVEL PARTY – CHILD UNDER 18

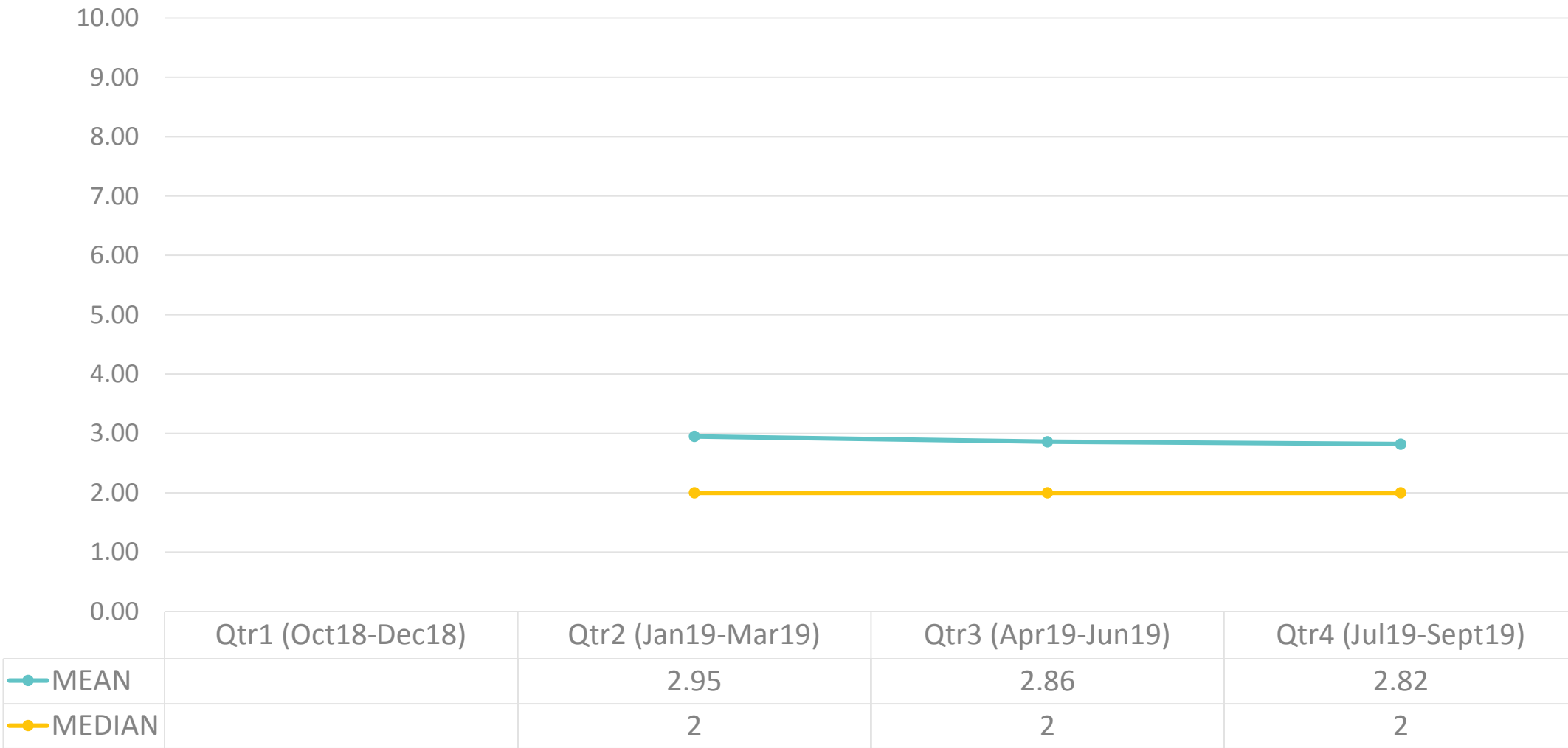


TRAVEL PARTY SIZE



Mean = 2.82
Median = 2

TRAVEL PARTY SIZE – TRACKING

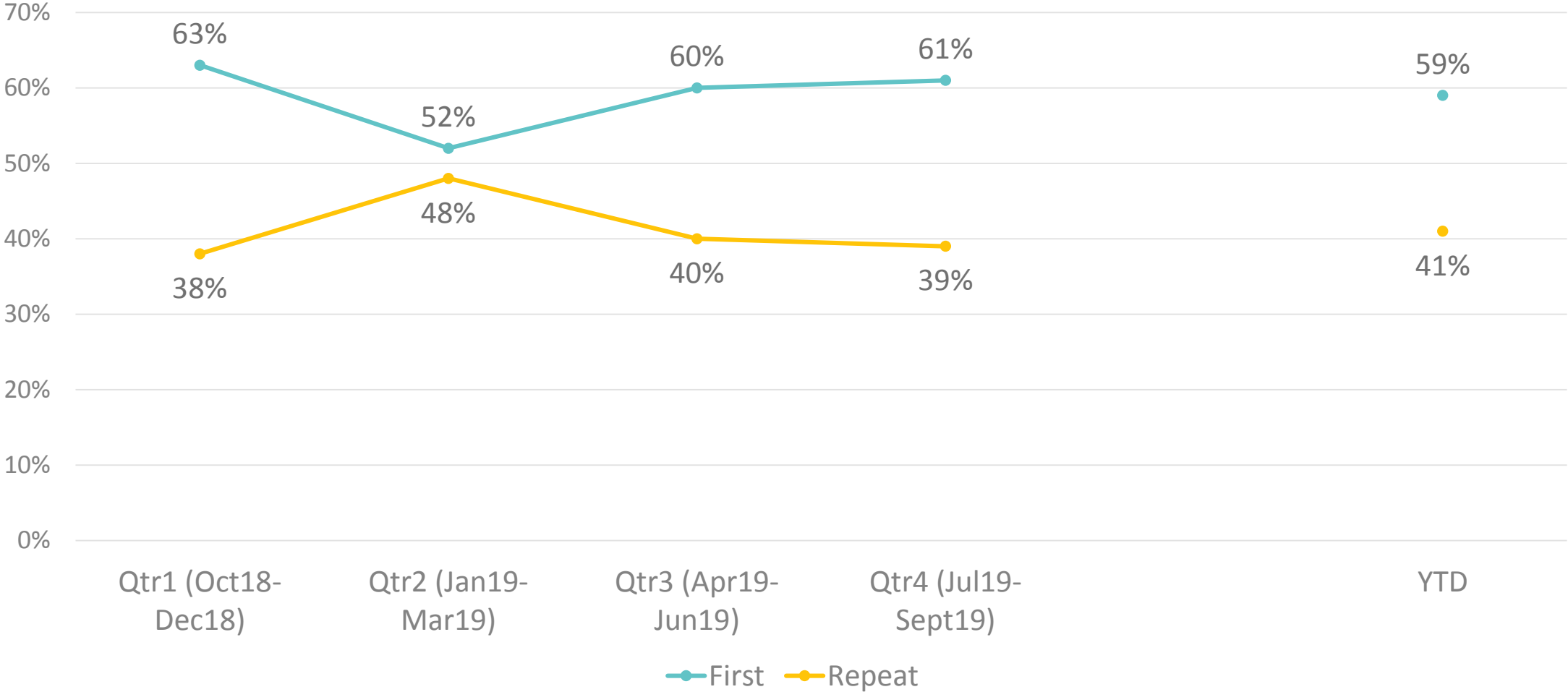


TRIPS TO GUAM



Mean = 2.44
Median = 1

TRIPS TO GUAM – TRACKING



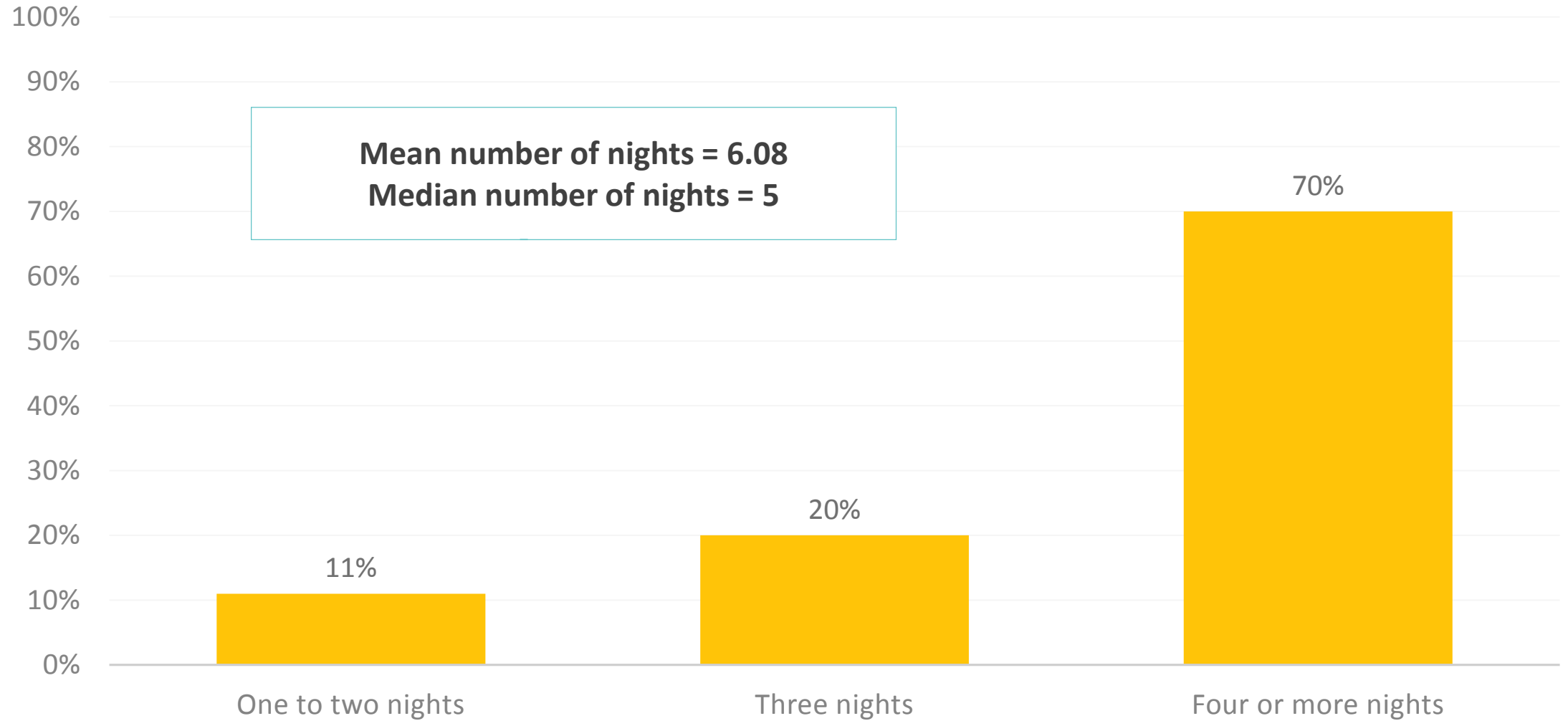
TRIPS TO GUAM – SEGMENTATION

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

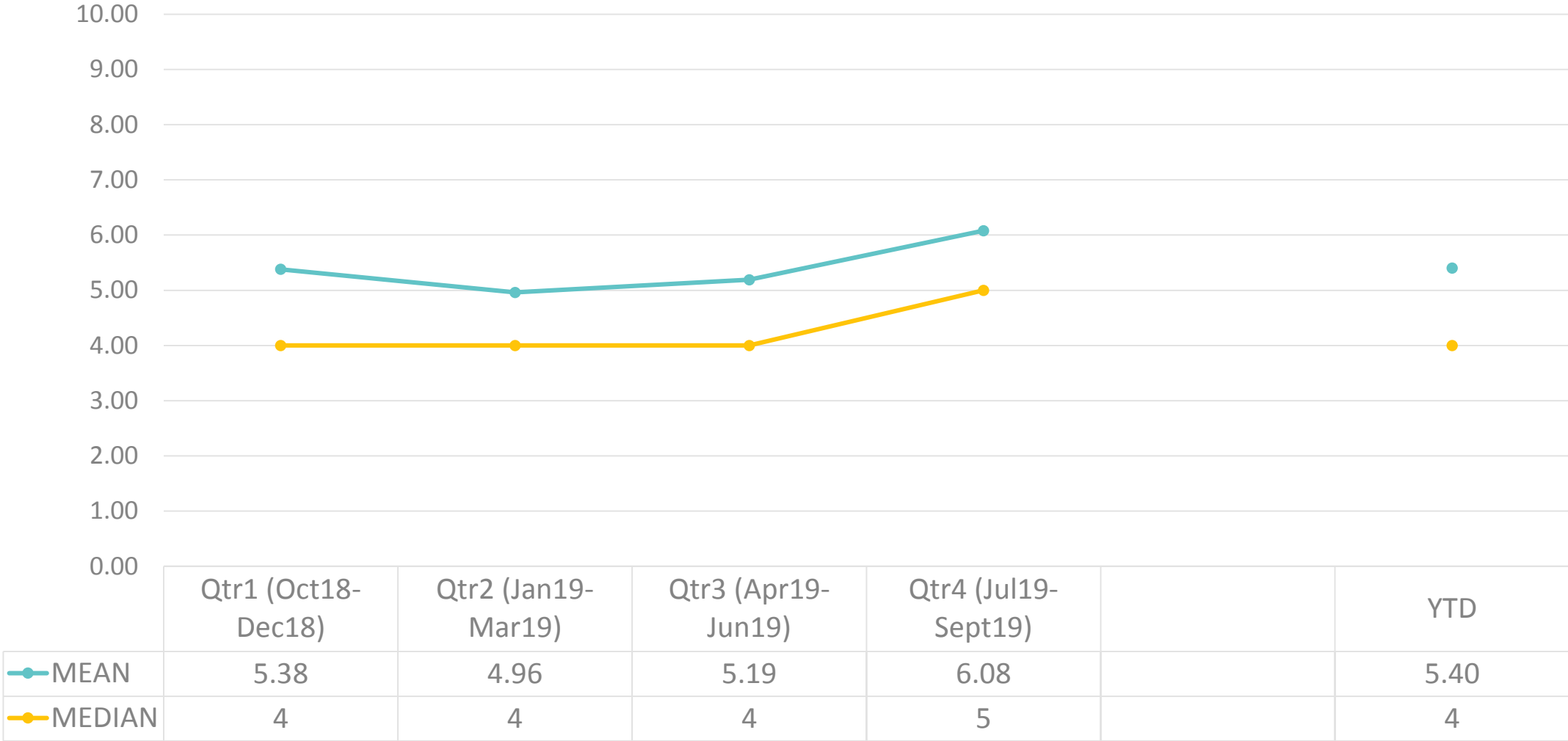
| | | TOTAL | FAMILY | FIT | MICE | LEISURE |
|----|----------|-------|--------|------|------|---------|
| | | - | - | - | - | - |
| Q9 | 1st time | 61% | 55% | 61% | 67% | 62% |
| | Repeat | 39% | 45% | 39% | 33% | 38% |
| | Total | 102 | 56 | 102 | 3 | 89 |
| Q9 | Mean | 2.44 | 2.55 | 2.44 | 1.33 | 2.43 |
| | Median | 1 | 1 | 1 | 1 | 1 |

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LENGTH OF STAY



LENGTH OF STAY – TRACKING



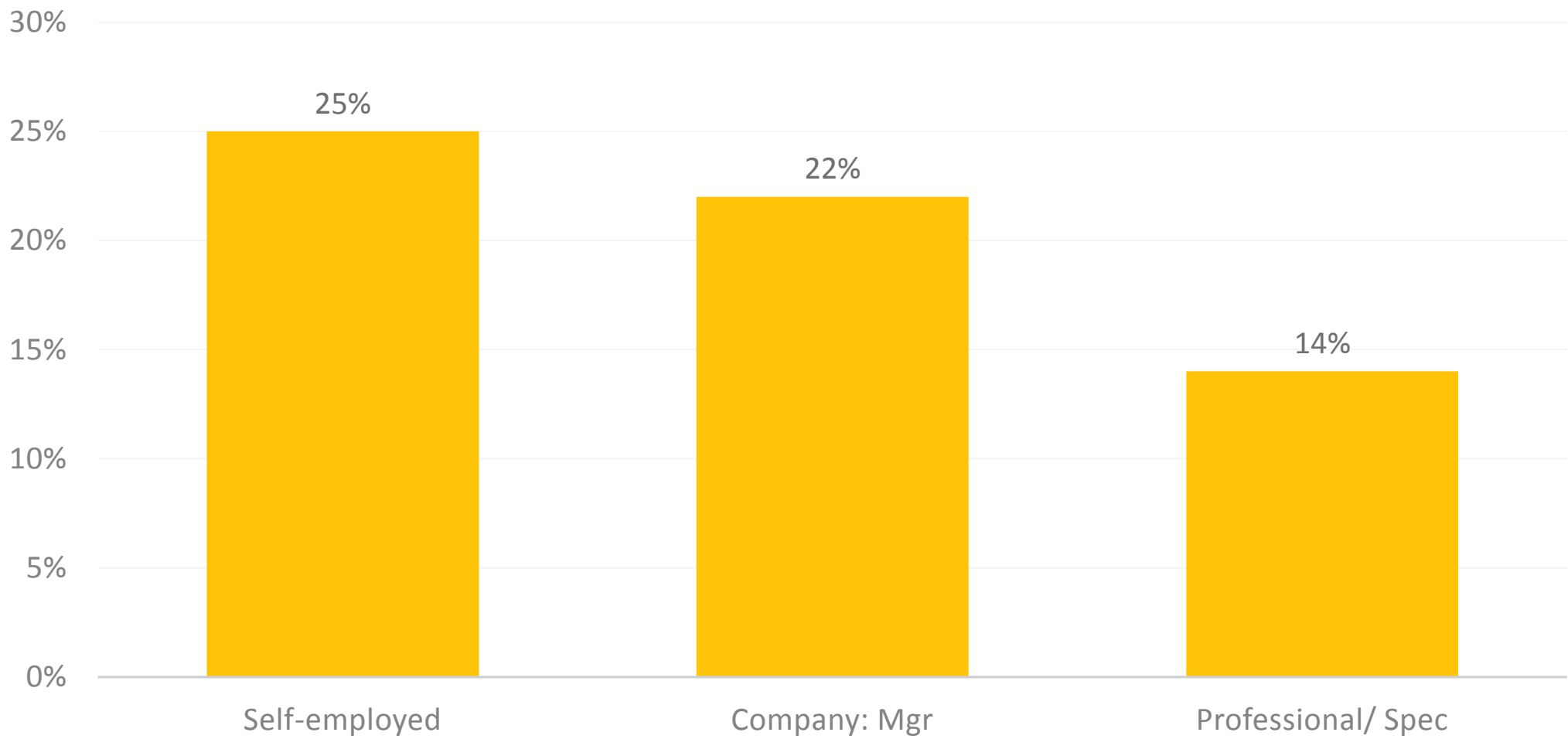
LENGTH OF STAY – SEGMENTATION

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

| | | TOTAL | FAMILY | FIT | MICE | LEISURE |
|----|------------|-------|--------|------|------|---------|
| | | - | - | - | - | - |
| SA | 1-2 nights | 11% | 9% | 11% | 33% | 10% |
| | 3 nights | 20% | 23% | 20% | | 21% |
| | 4+ | 70% | 68% | 70% | 67% | 69% |
| | Total | 102 | 56 | 102 | 3 | 89 |
| SA | Mean | 6.08 | 4.59 | 6.08 | 4.67 | 5.49 |
| | Median | 5 | 5 | 5 | 5 | 5 |

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OCCUPATION – Top Responses (10%+)



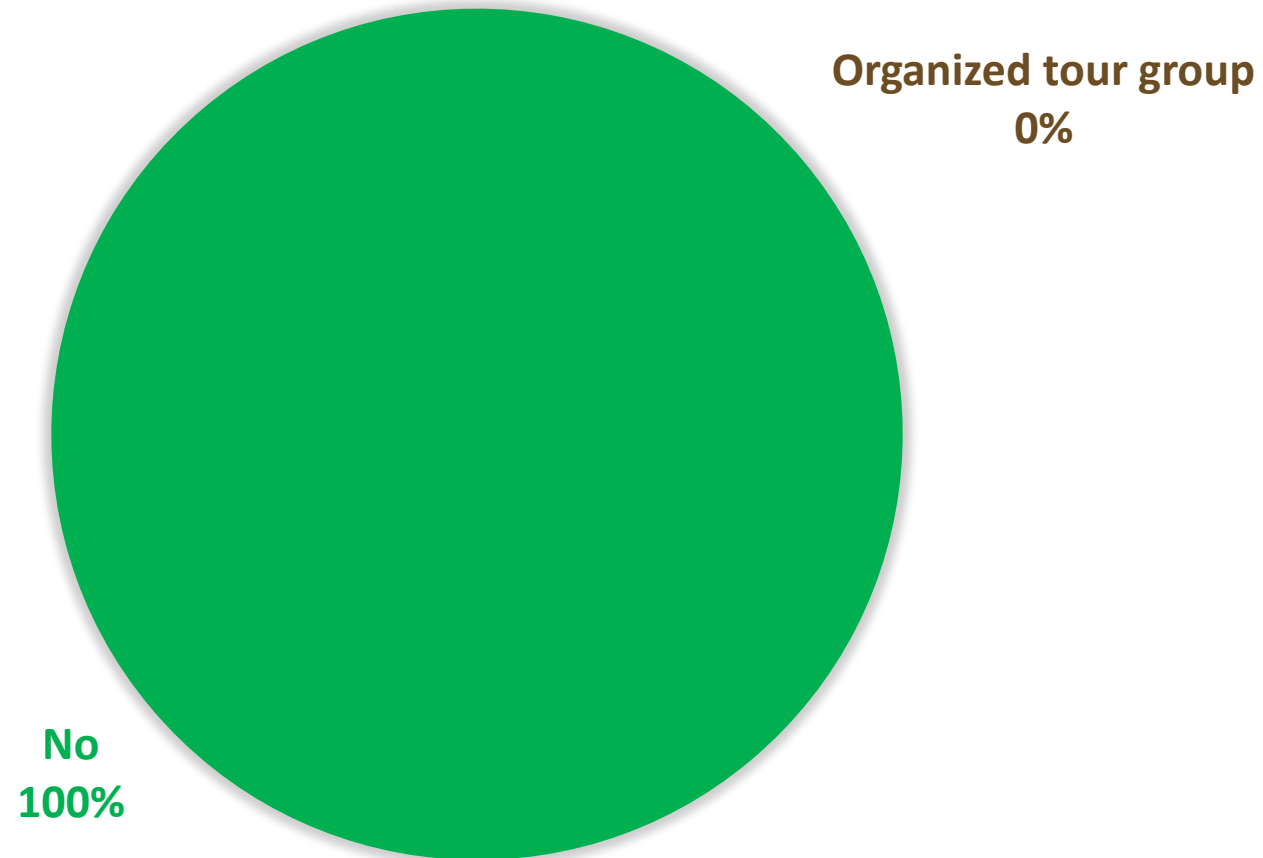


SECTION 2

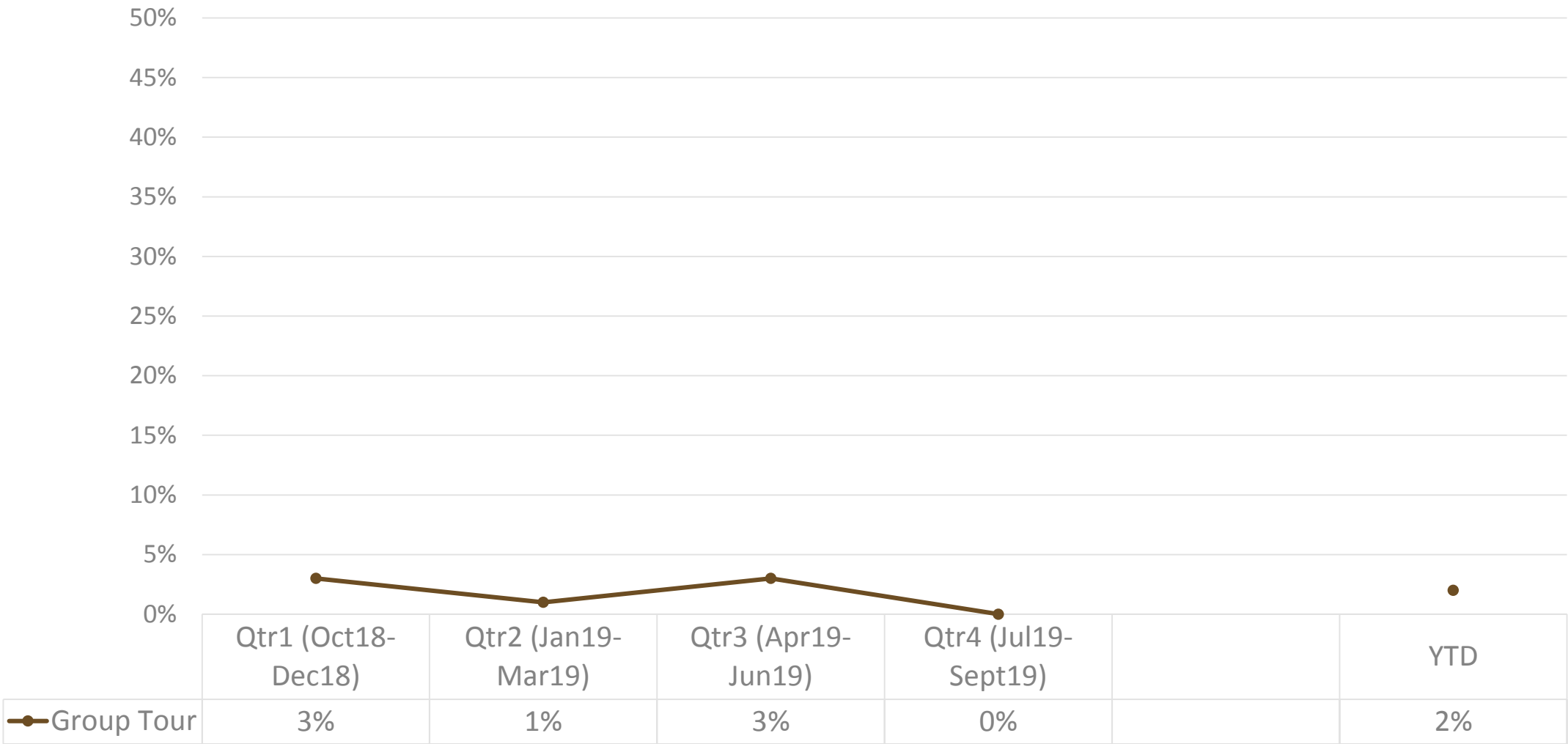
TRAVEL PLANNING



ORGANIZED TOUR GROUP



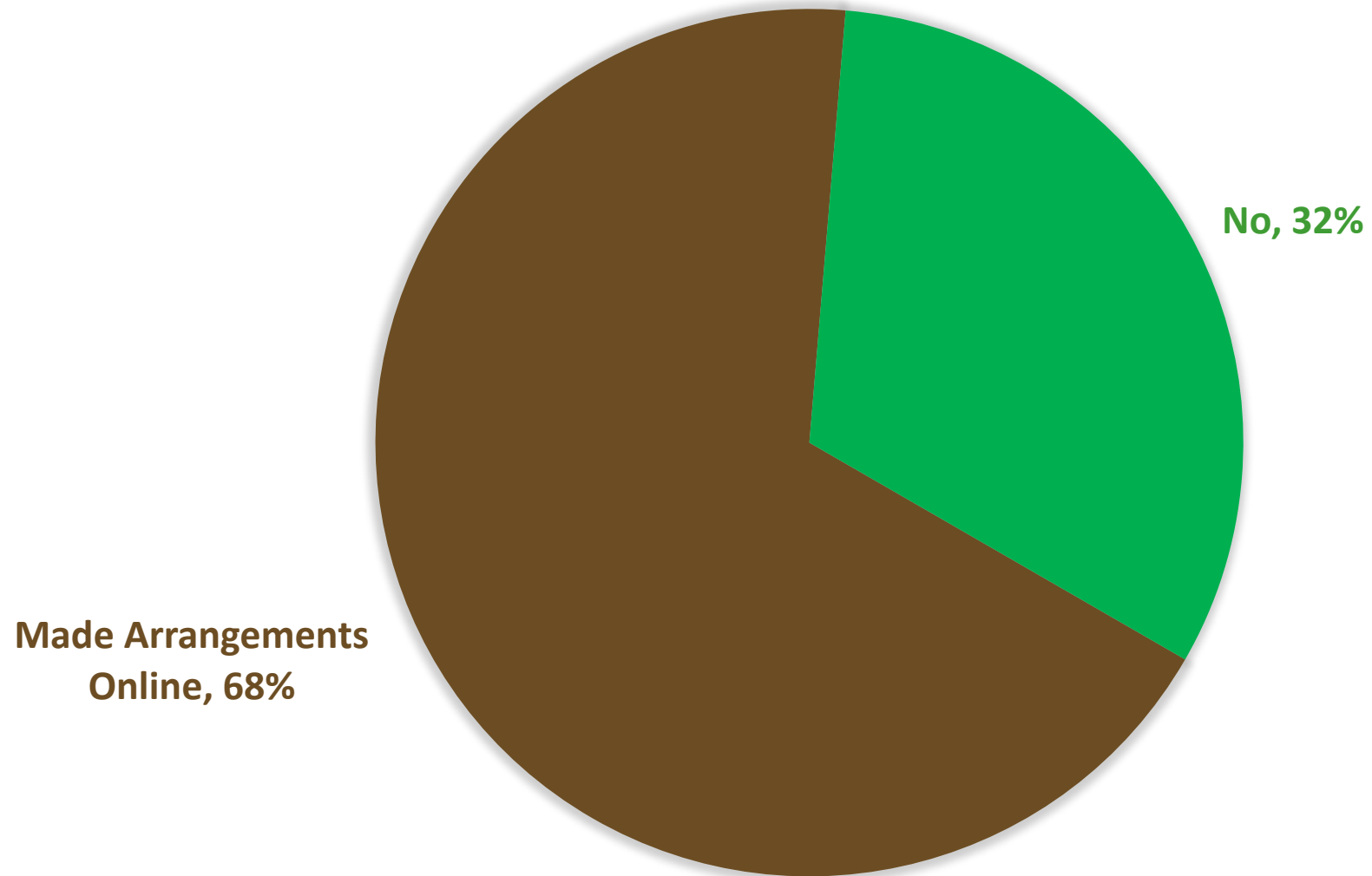
ORGANIZED TOUR GROUP – TRACKING



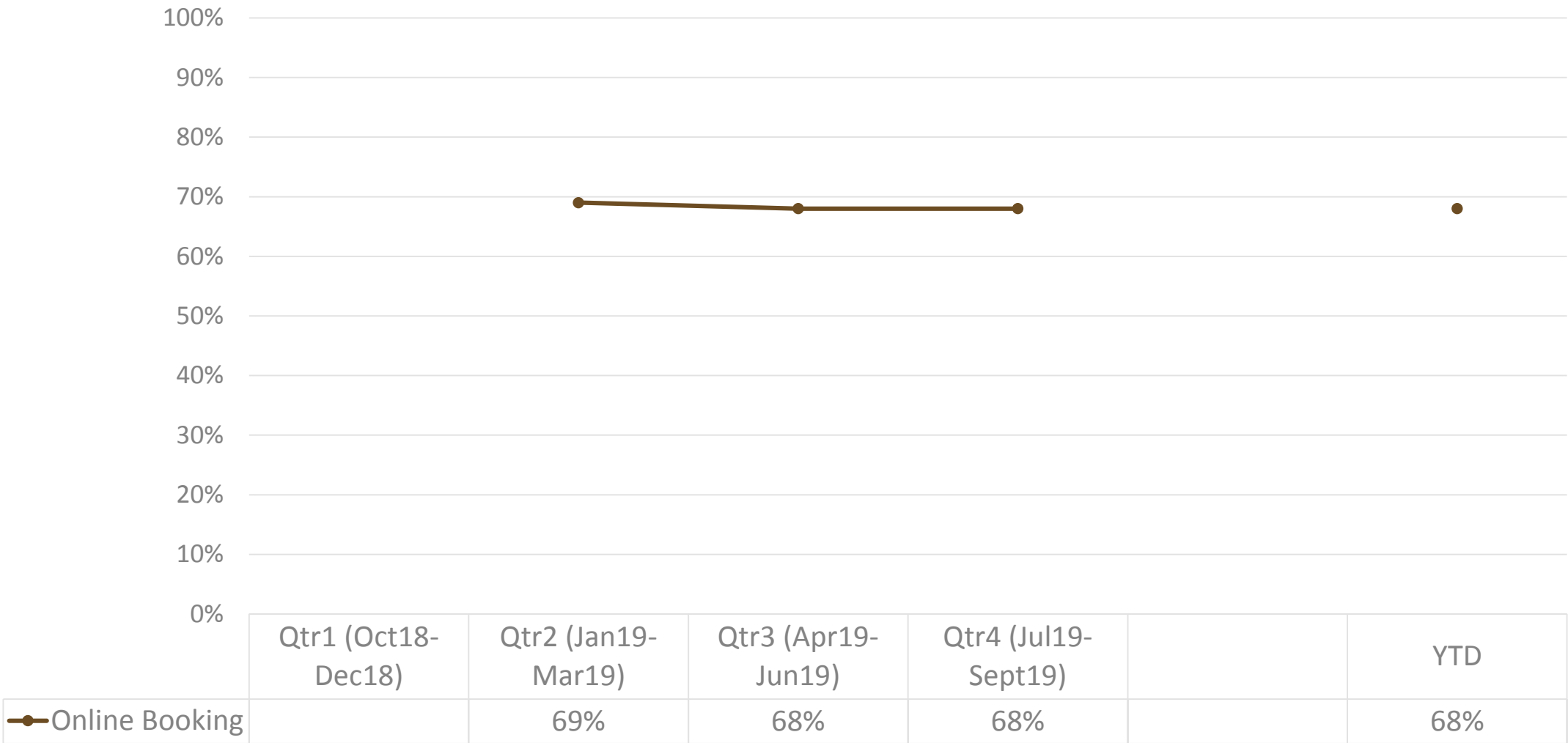
[A]



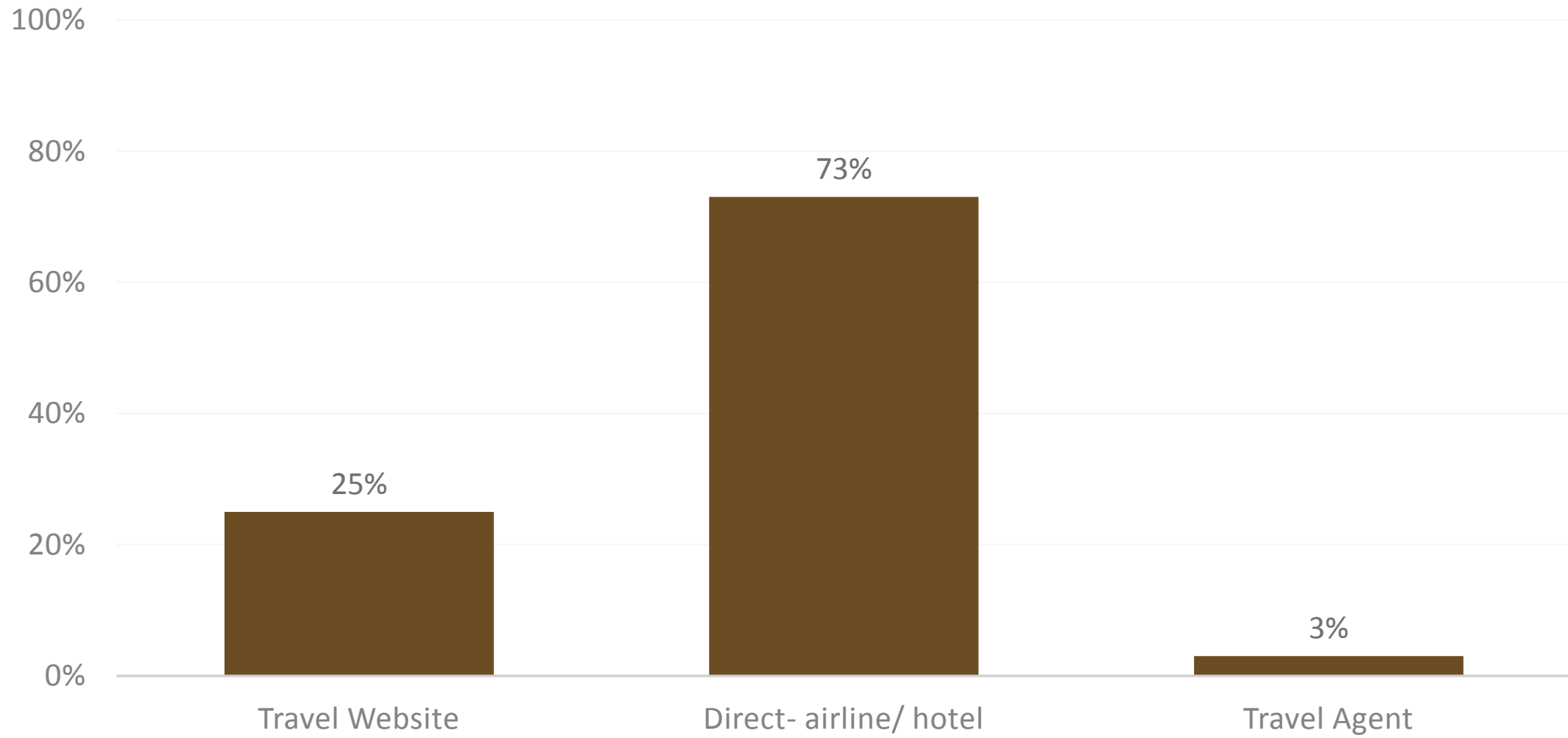
ONLINE BOOKING



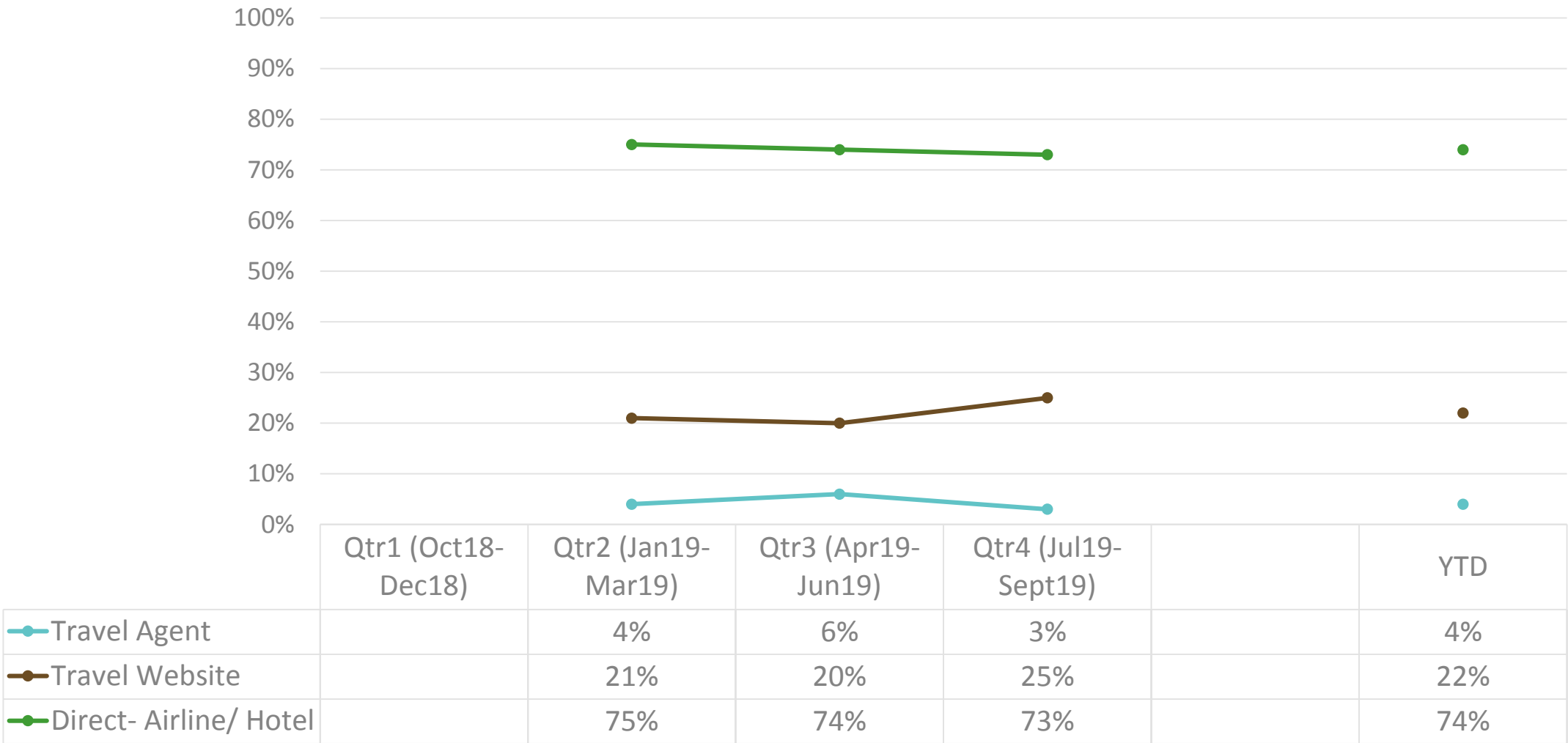
ONLINE BOOKING – TRACKING



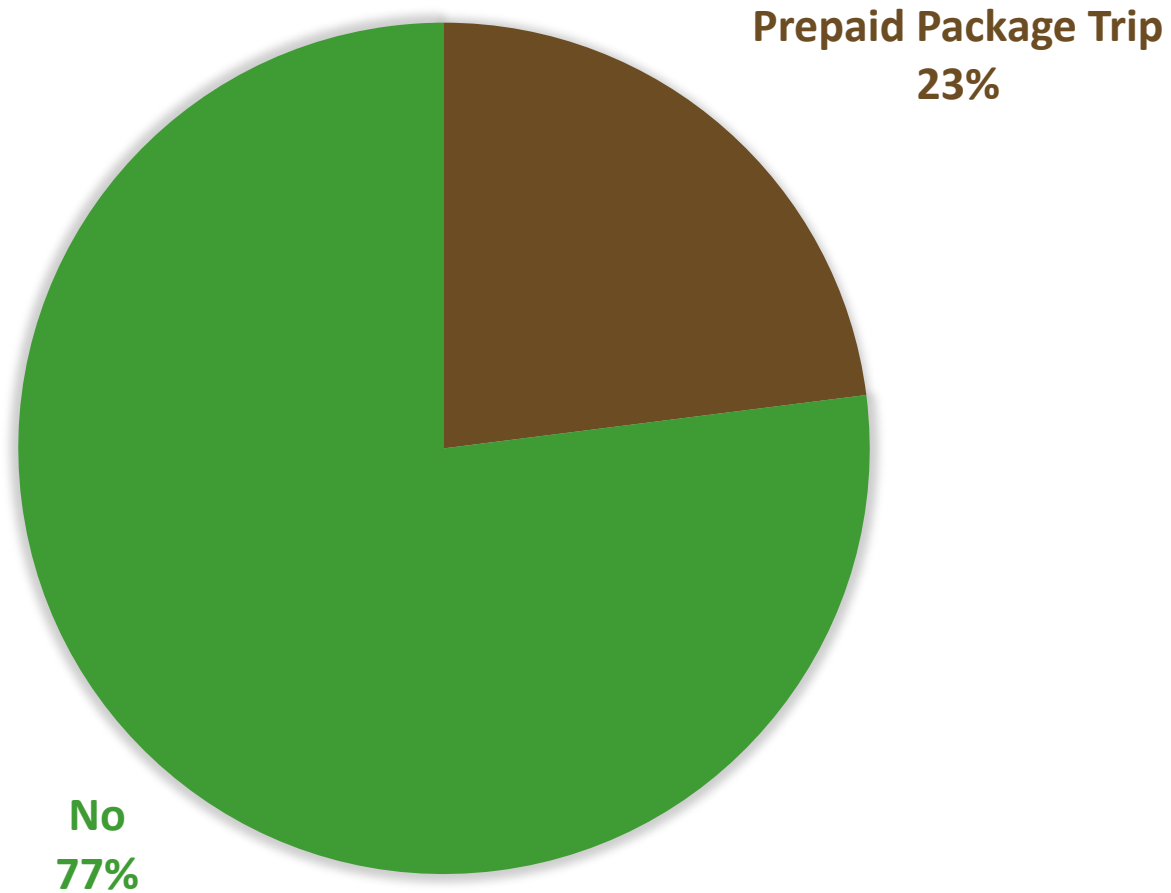
TRAVEL ARRANGEMENTS



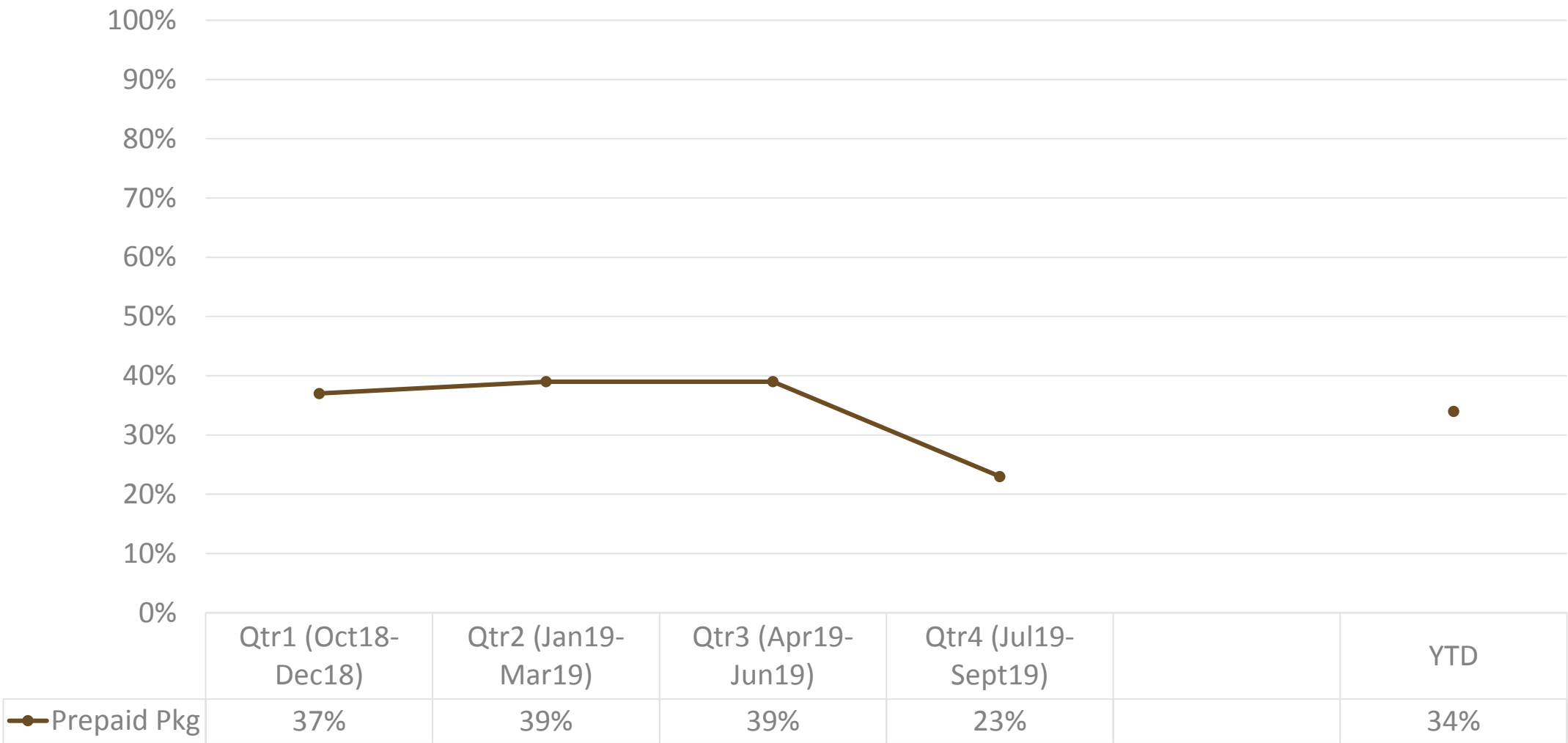
TRAVEL ARRANGEMENTS – TRACKING



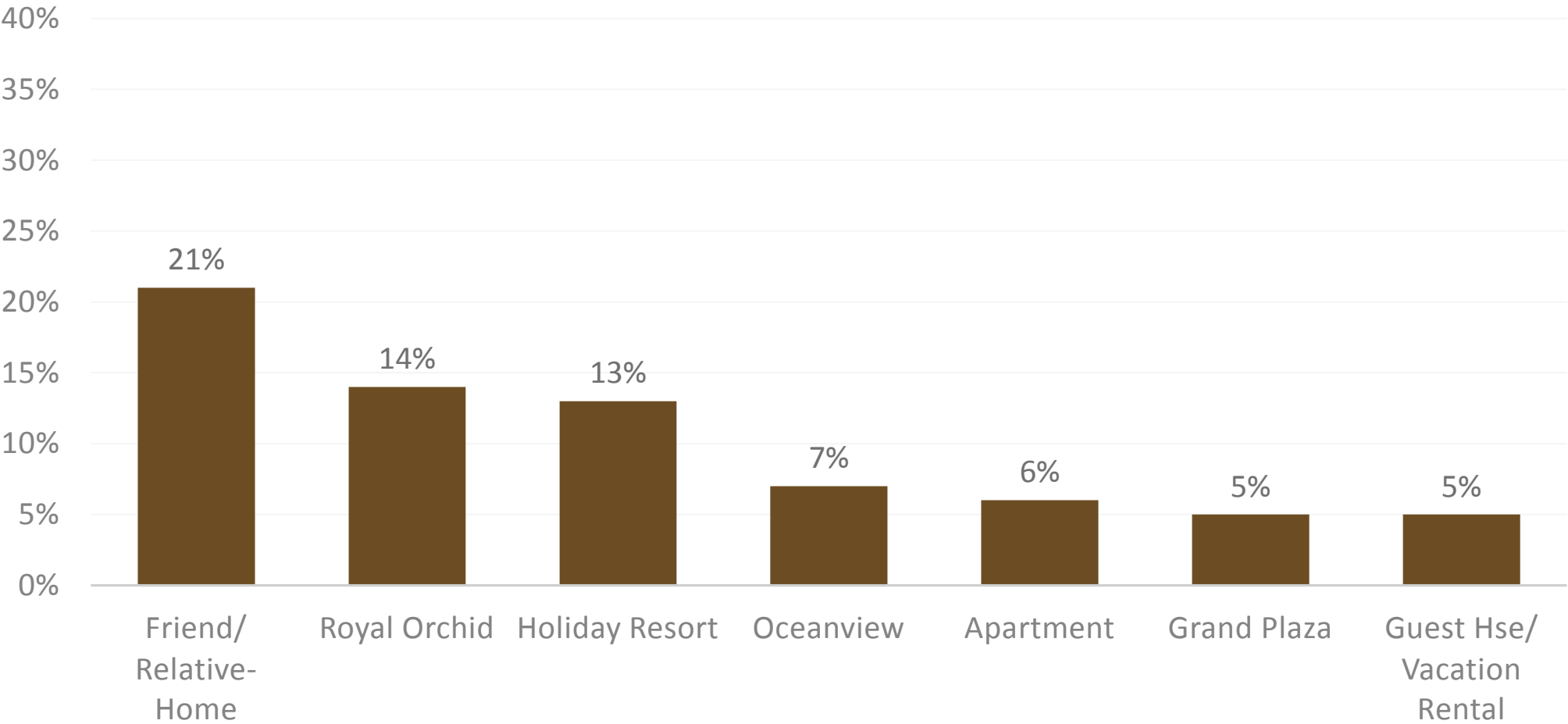
PREPAID PACKAGE TRIP



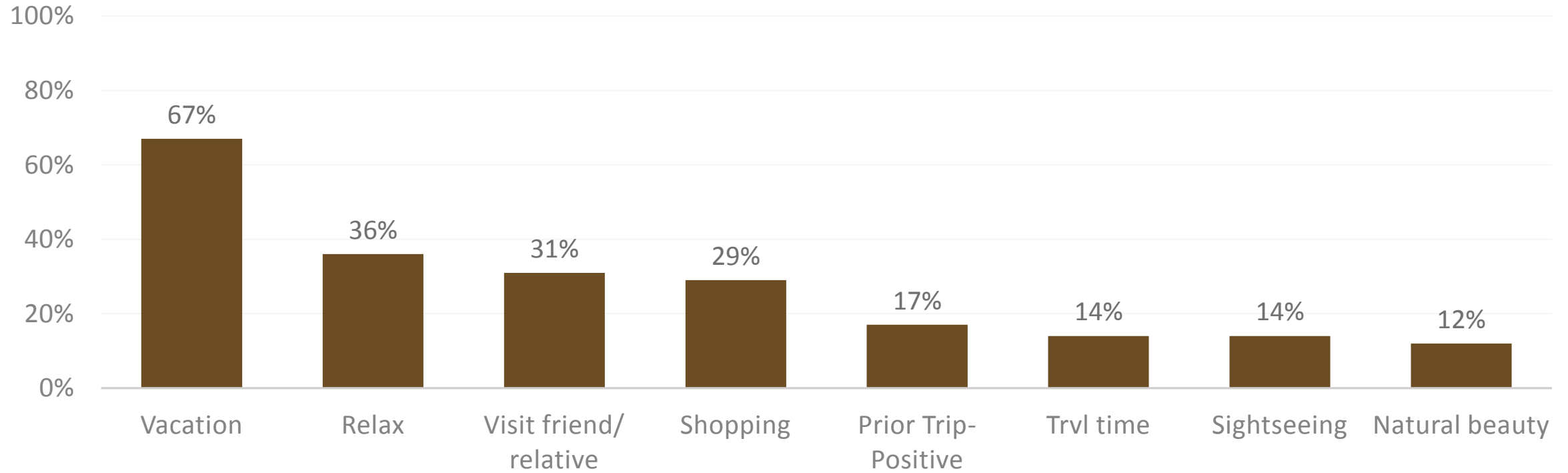
PREPAID PACKAGE TRIP



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 | LEISURE |
|---|-------|--------|-----|------|---------|
| | - | - | - | - | - |
| Q8 Vacation | 67% | 70% | 67% | 67% | 76% |
| Just to relax | 36% | 29% | 36% | 67% | 42% |
| To visit friends or relatives | 31% | 29% | 31% | | 26% |
| Shopping | 29% | 29% | 29% | | 30% |
| A previous visit | 17% | 25% | 17% | | 17% |
| Short travel time (not too far from home) | 14% | 13% | 14% | | 15% |
| Sightseeing/ visiting tourist spots | 14% | 13% | 14% | 33% | 16% |
| Beautiful seas, beaches, tropical climate | 12% | 13% | 12% | | 13% |
| Price of the tour package | 8% | 13% | 8% | | 4% |
| Recommendation of friend/ relative/ travel agency | 7% | 7% | 7% | | 7% |
| It is a safe place to spend a vacation | 6% | 9% | 6% | | 7% |
| Shop Guam e-Festival | 5% | 4% | 5% | 33% | 6% |
| Company/ business trip | 4% | 4% | 4% | | 4% |
| Honeymoon | 4% | 5% | 4% | | 4% |
| Adventure | 3% | 2% | 3% | | 3% |
| Social Media networks | 3% | 5% | 3% | | 1% |
| Scuba diving | 2% | 2% | 2% | | 1% |
| Career certification/ testing | 2% | | 2% | | 2% |
| To Get Married/ attend Wedding | 2% | 4% | 2% | | 1% |
| Incentive trip | 2% | 2% | 2% | 67% | 2% |
| Water sports (snorkeling, windsurfing, parasailing) | 1% | | 1% | | |
| Convention/ conference/ trade show/ meeting | 1% | | 1% | 33% | 1% |
| Government or military | 1% | 2% | 1% | | 1% |
| School trip | 1% | 2% | 1% | | |
| Total | 102 | 56 | 102 | 3 | 89 |

Prepared by Anthology Research



SECTION 3

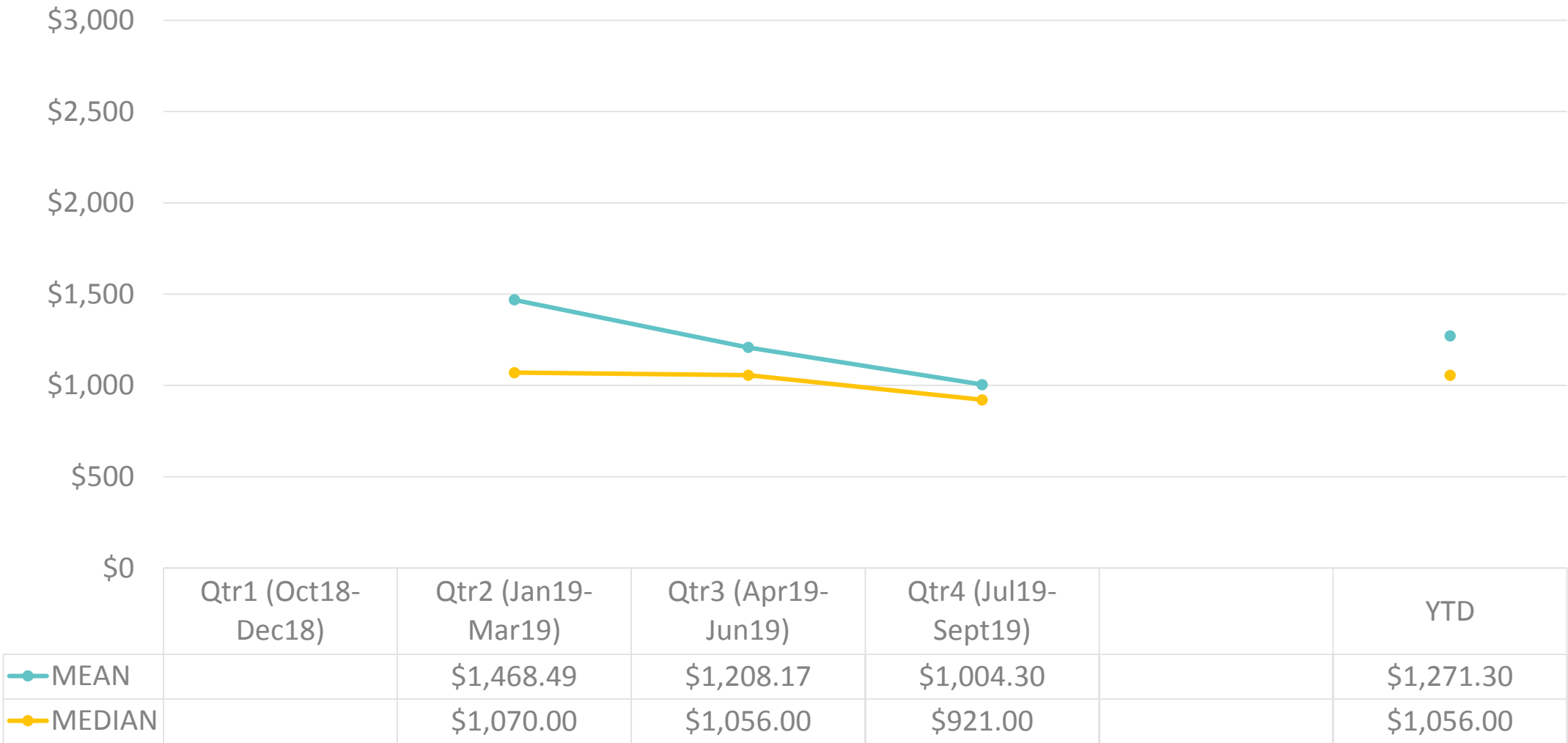
EXPENDITURES



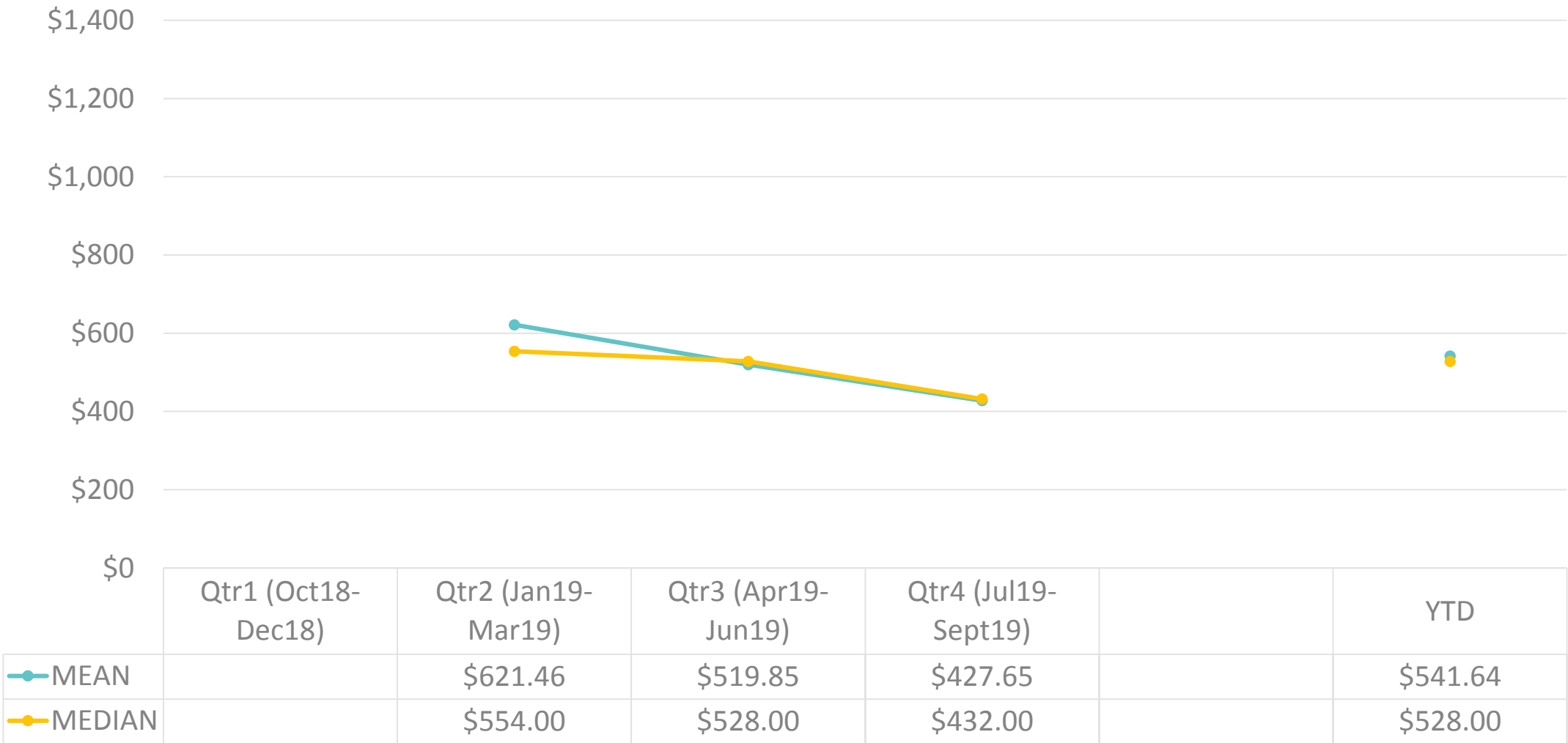
PREPAID PACKAGE EXPENDITURES

- \$1,004.30 = overall mean average prepaid package expense (for entire travel party) by respondent
- \$427.65 = overall mean average **per person** prepaid package expenditures

PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING



PREPAID PACKAGE – PER PERSON EXPENSE TRACKING



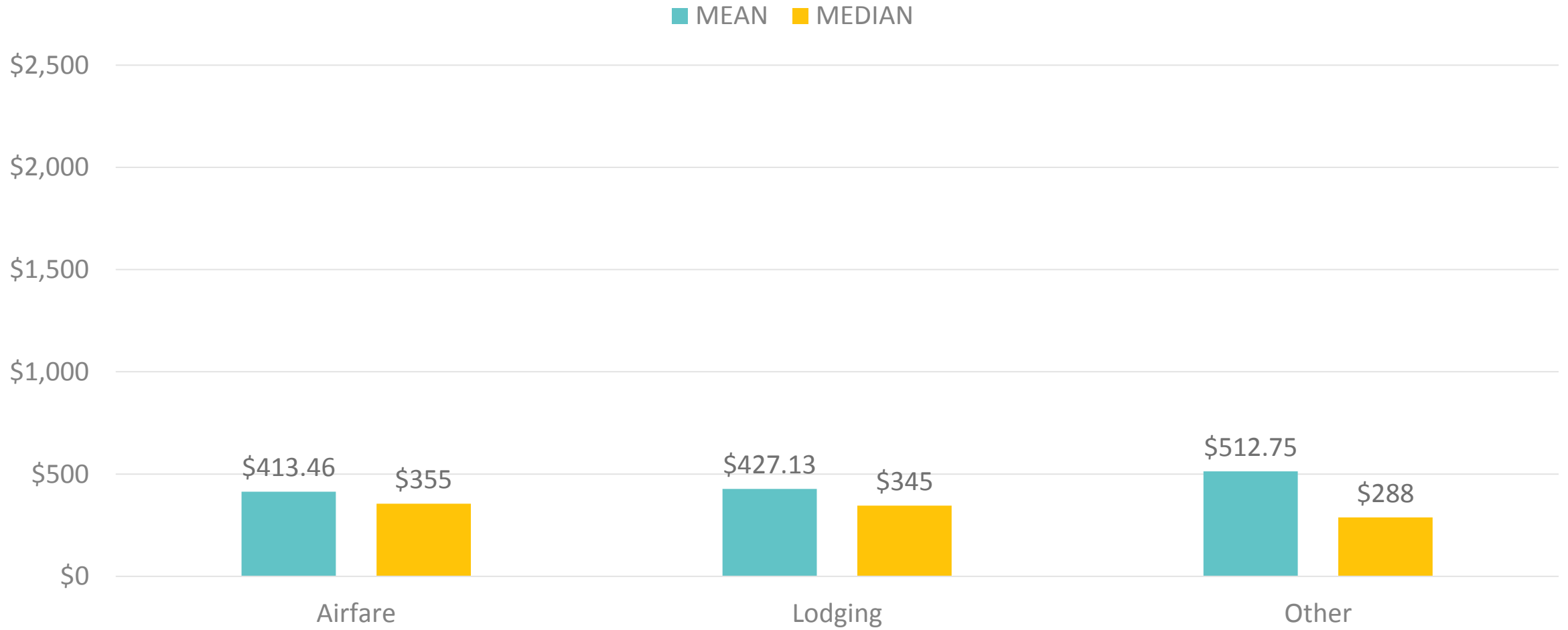
PREPAID PACKAGE – PER PERSON EXPENSE SEGMENTATION

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

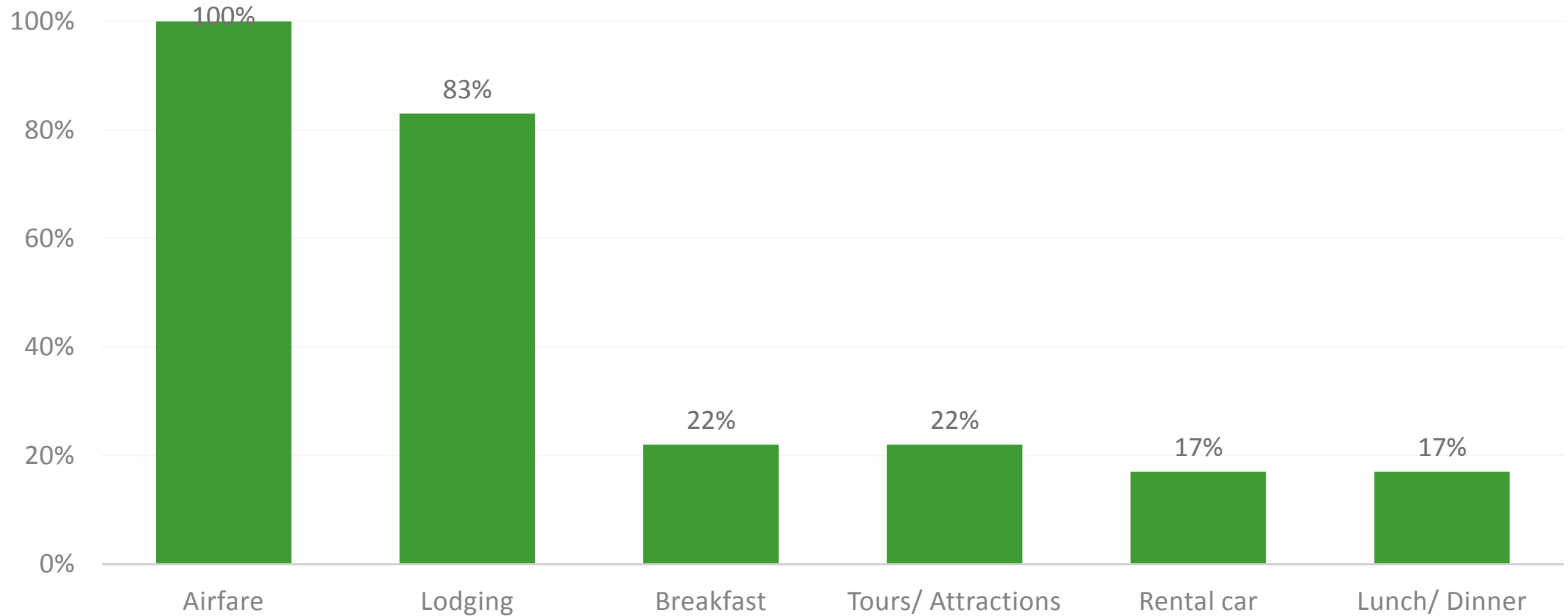
| | | TOTAL | FAMILY | FIT | MICE | LEISURE |
|------------------------|--------|----------|----------|----------|------|----------|
| | | - | - | - | - | - |
| PREPAID PKG PER PERSON | Mean | \$427.65 | \$355.72 | \$427.65 | . | \$427.65 |
| | Median | \$432 | \$302 | \$432 | . | \$432 |

Prepared by Anthology Research

PREPAID PACKAGE – BREAKDOWN



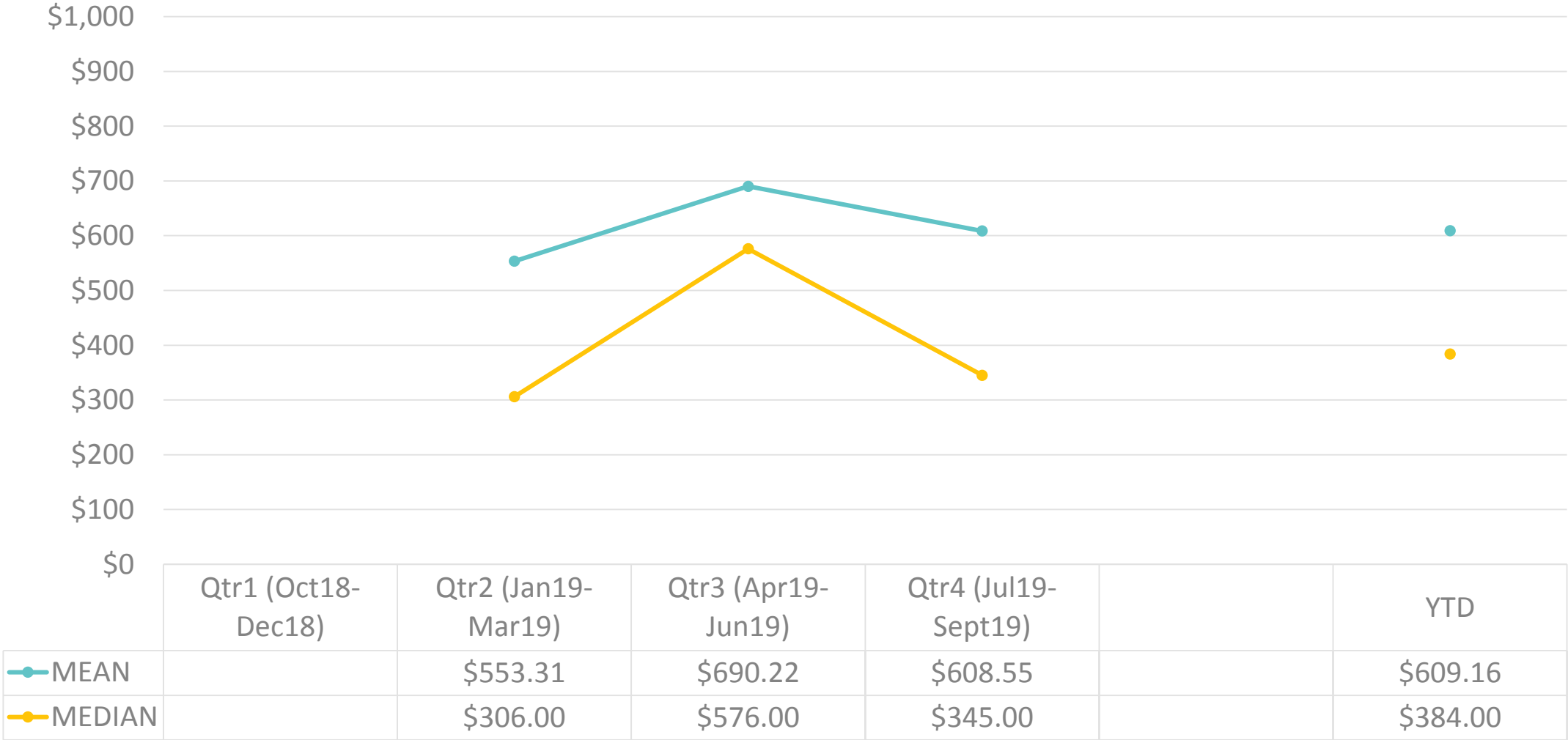
PREPAID PACKAGE – BREAKDOWN



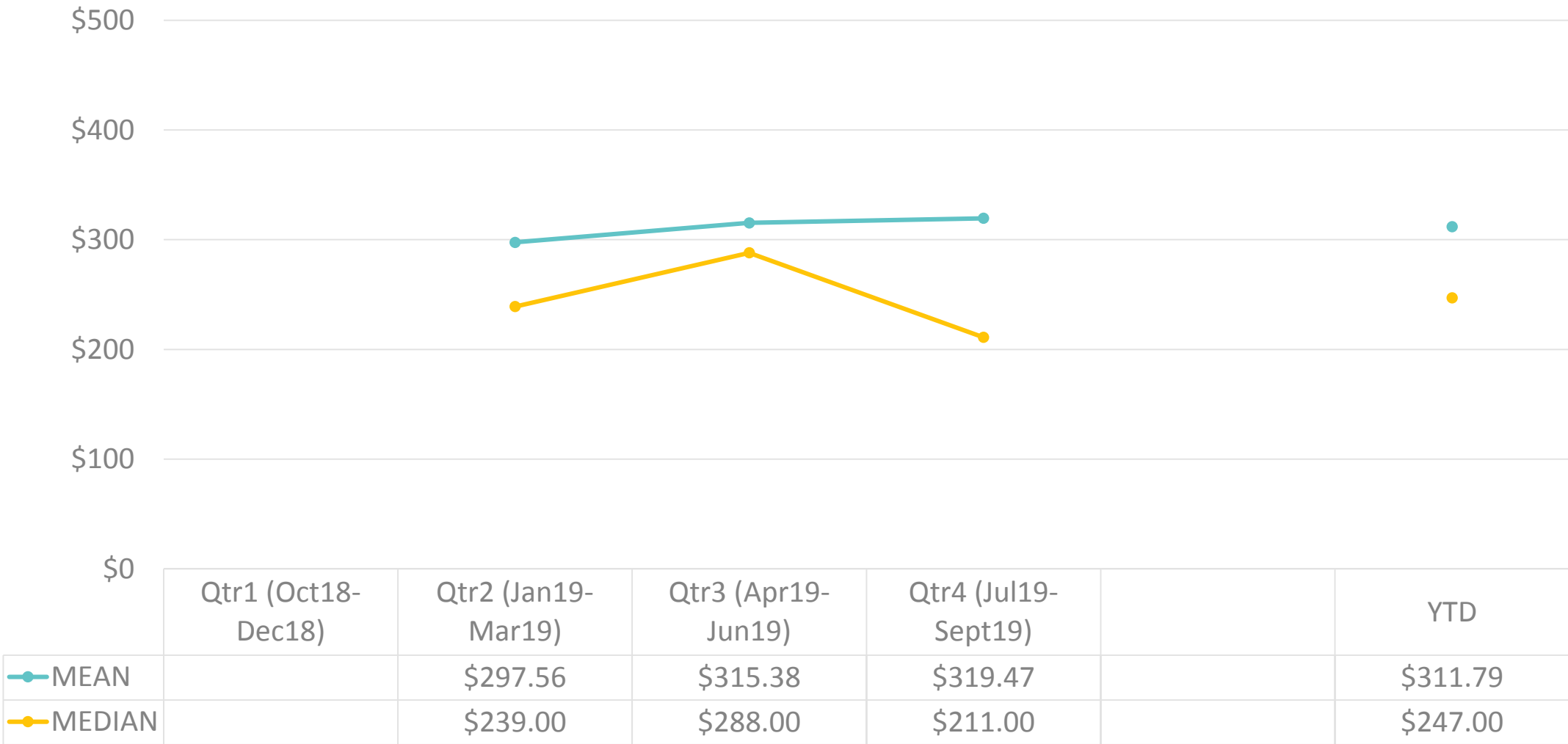
AIRFARE – FIT TRAVELER

- \$608.55 = overall mean average airfare expense (for entire travel party) by respondent
- \$319.47 = overall mean average **per person** airfare expenditures

AIRFARE – FIT TRAVELER (GROUP) TRACKING



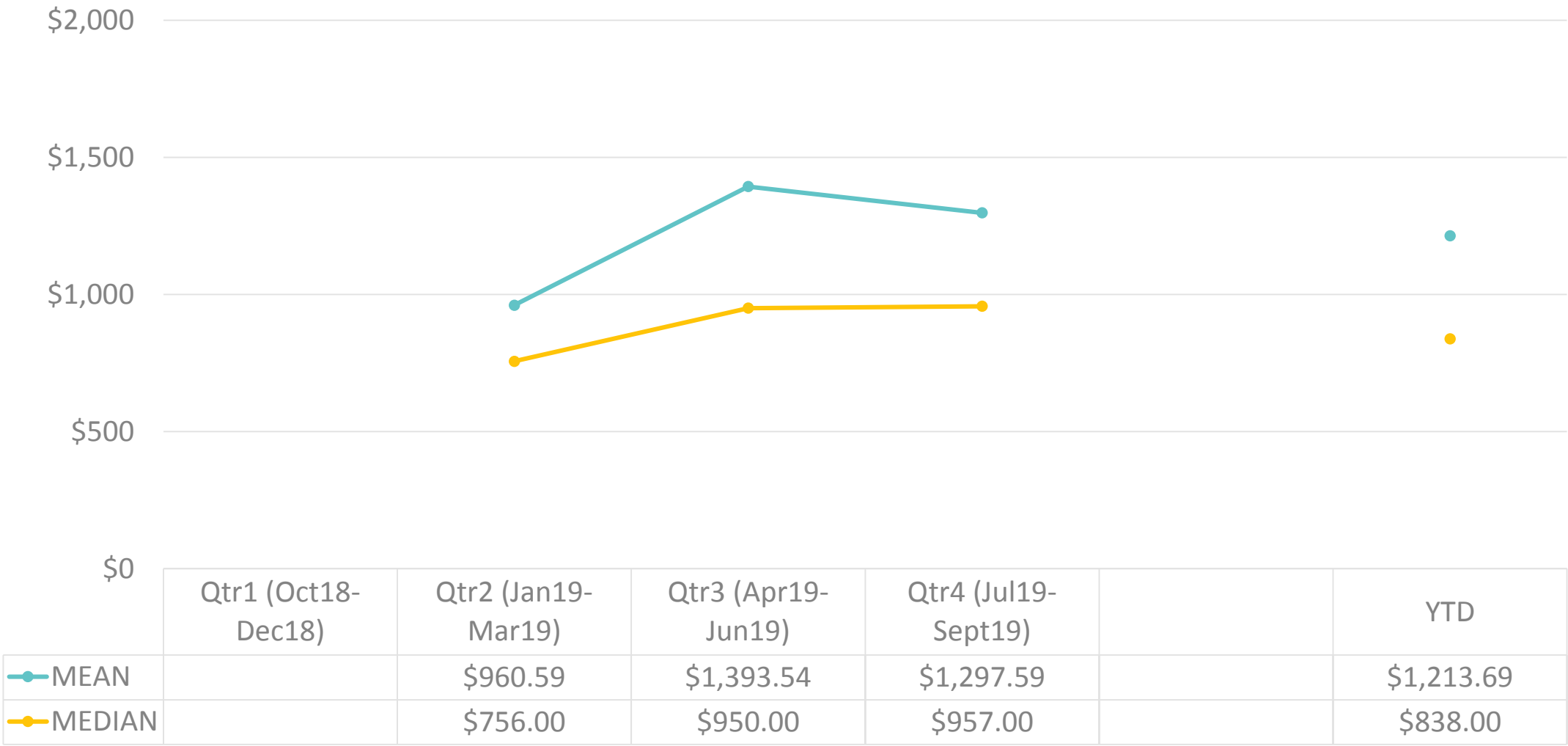
AIRFARE – FIT TRAVELER (Per Person) TRACKING



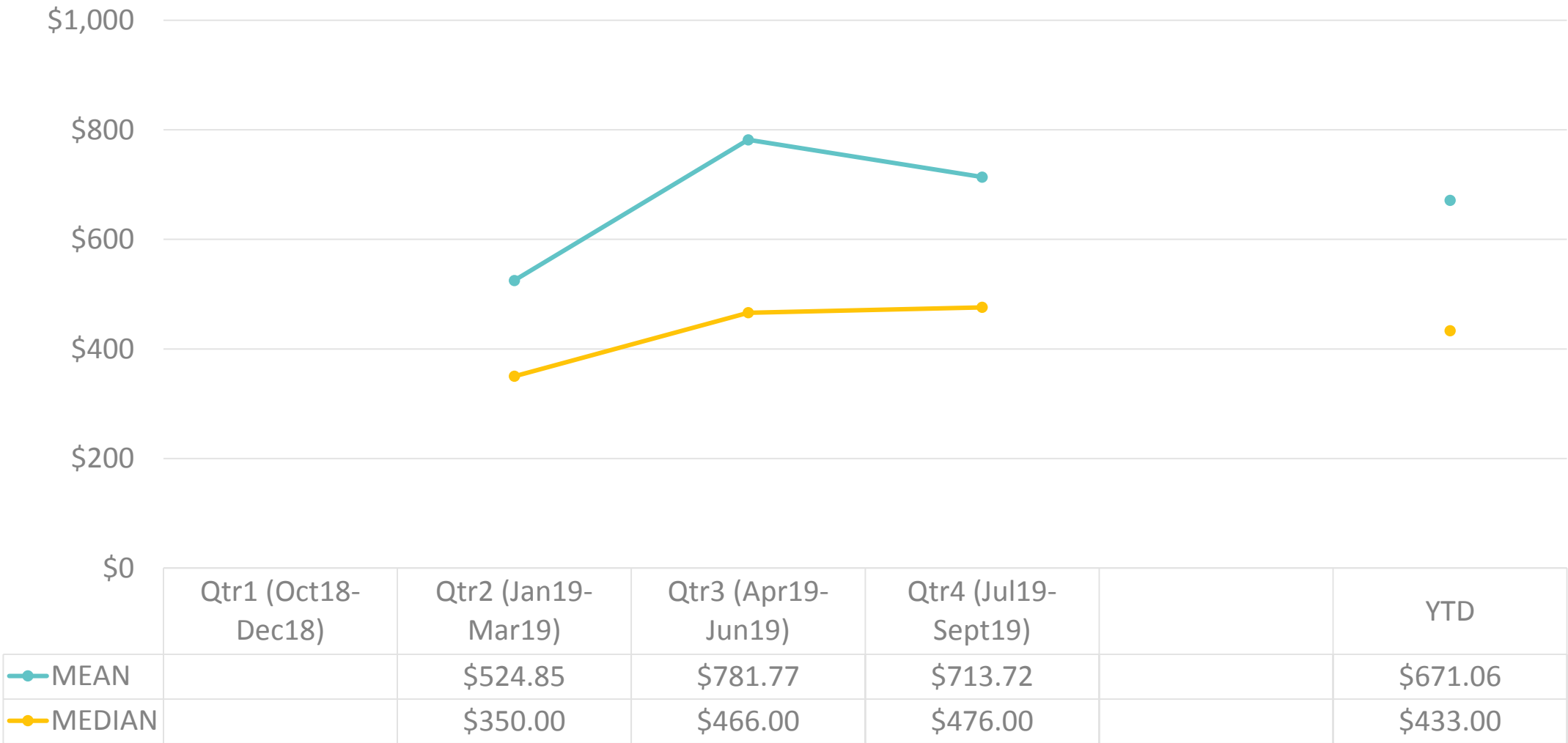
ONISLE EXPENDITURES

- \$1,297.59 = overall mean average expense (for entire travel party) by respondent
- \$713.72 = overall mean average **per person** expenditures

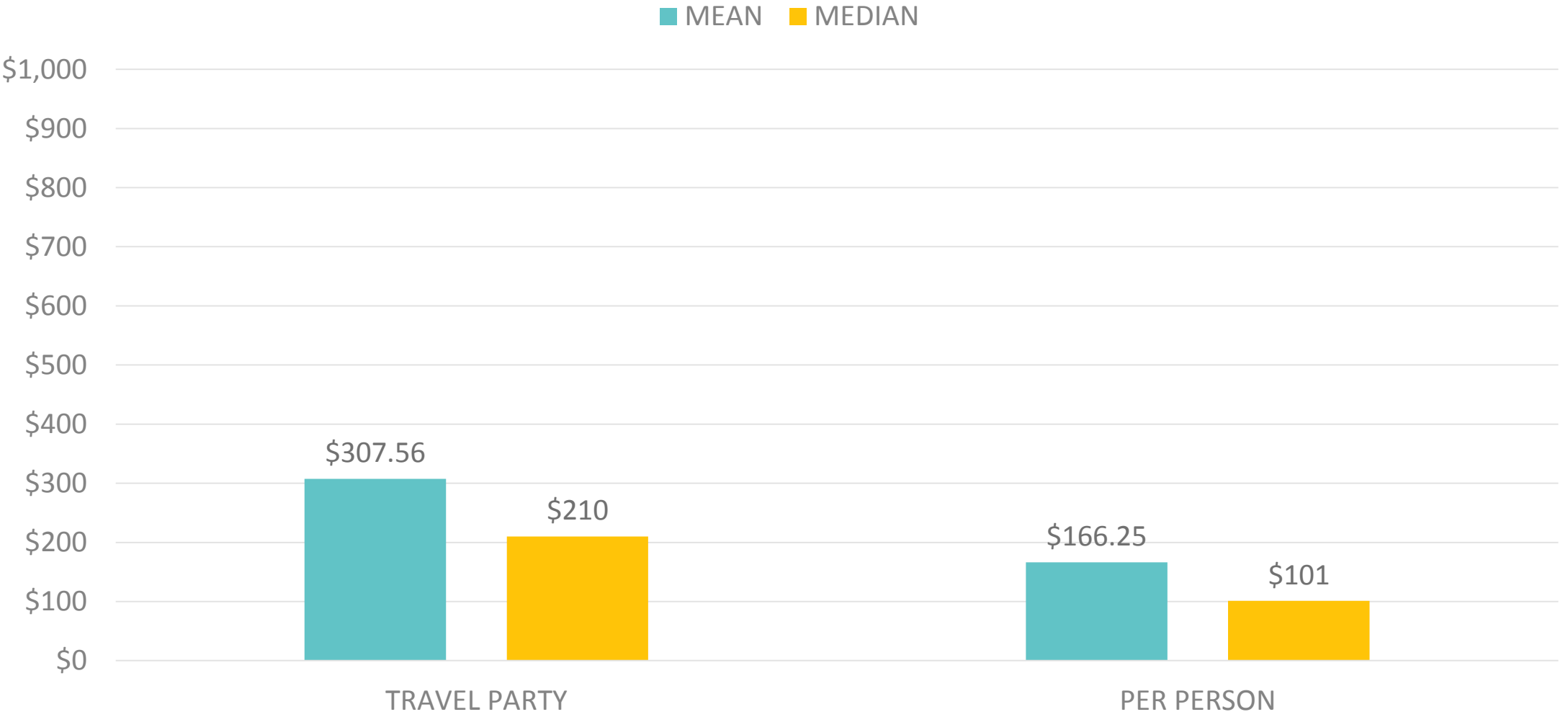
ONISLE – TRAVEL PARTY TRACKING



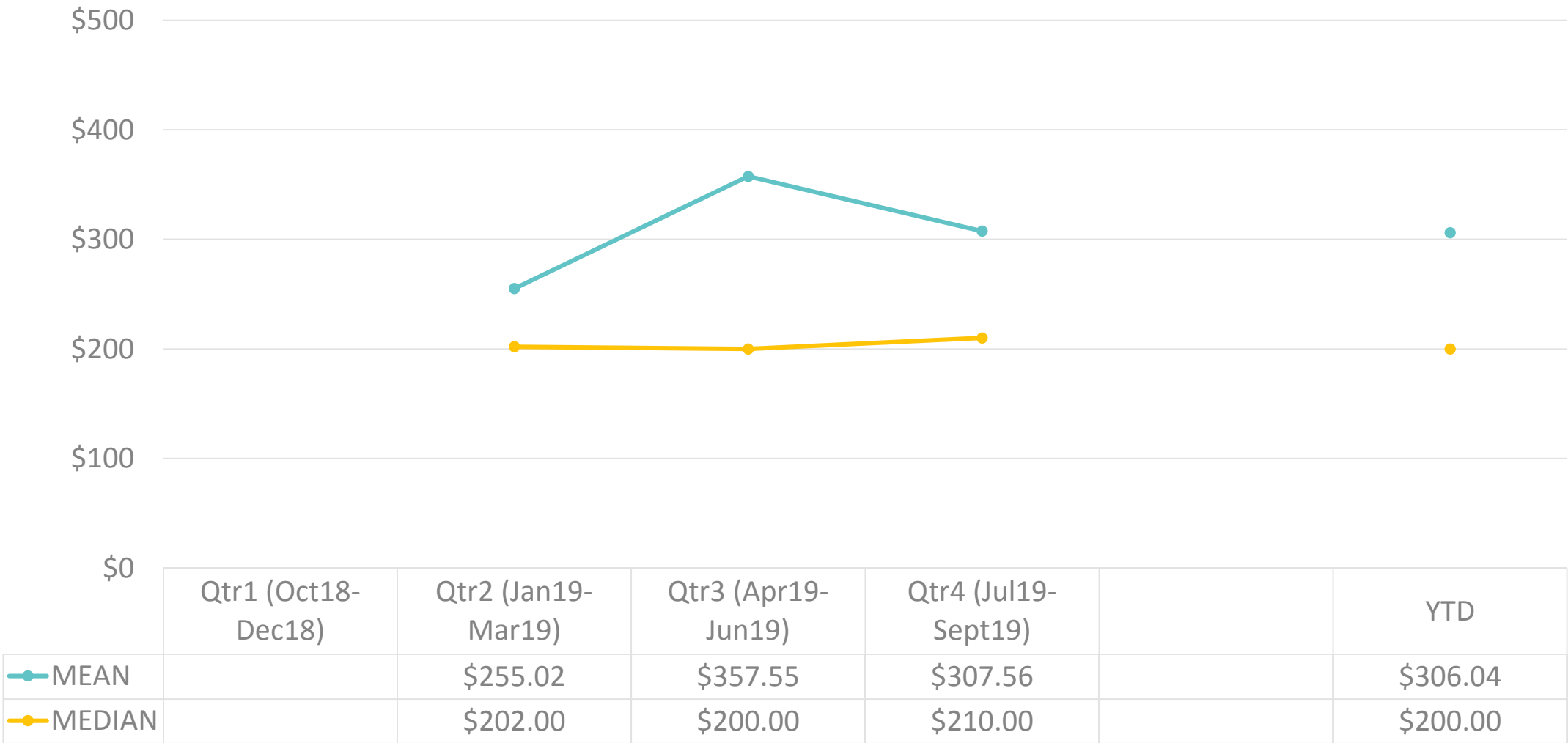
ONISLE – PER PERSON TRACKING



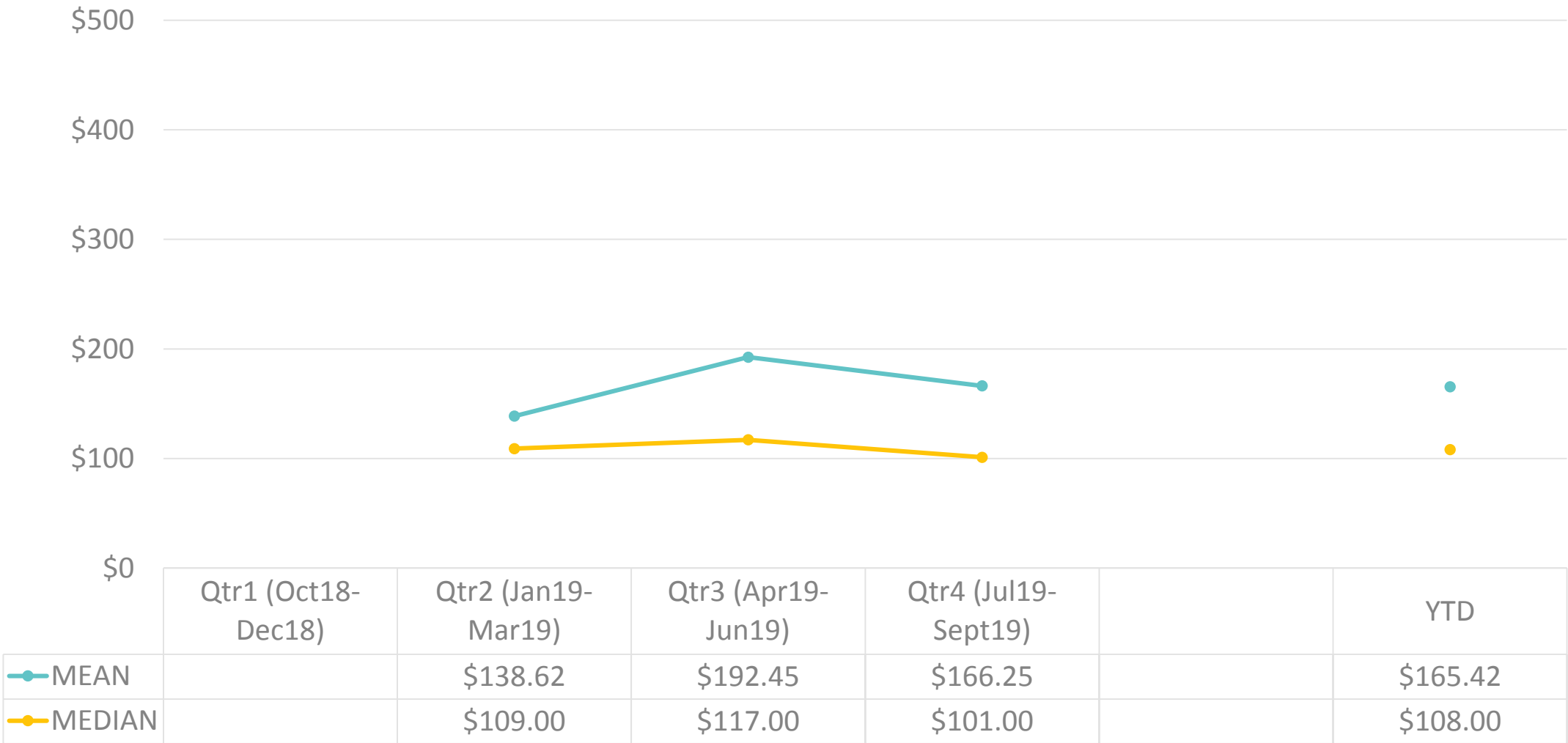
ONISLE – PER DAY SPENDING



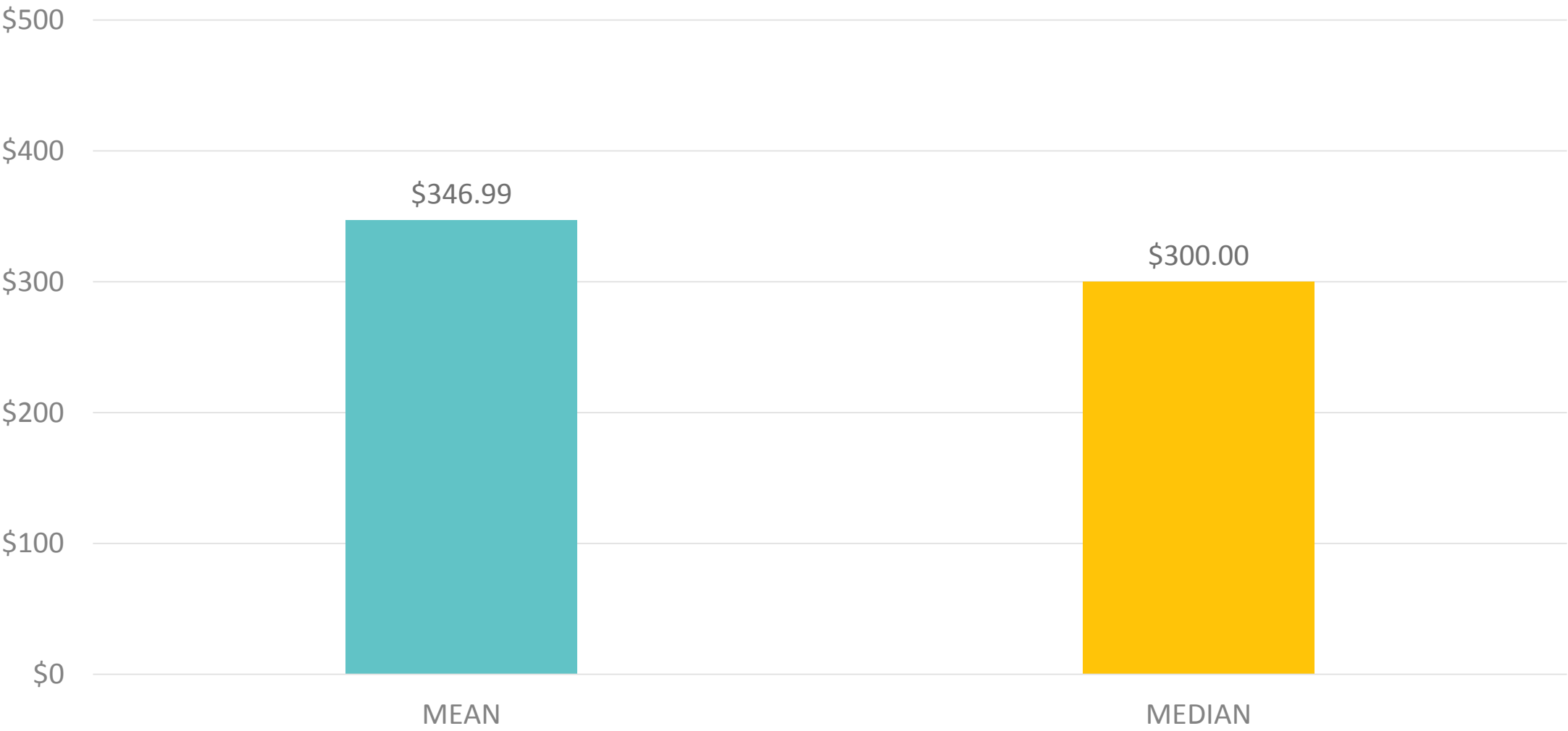
ONISLE – TRAVEL PARTY/ PER DAY TRACKING



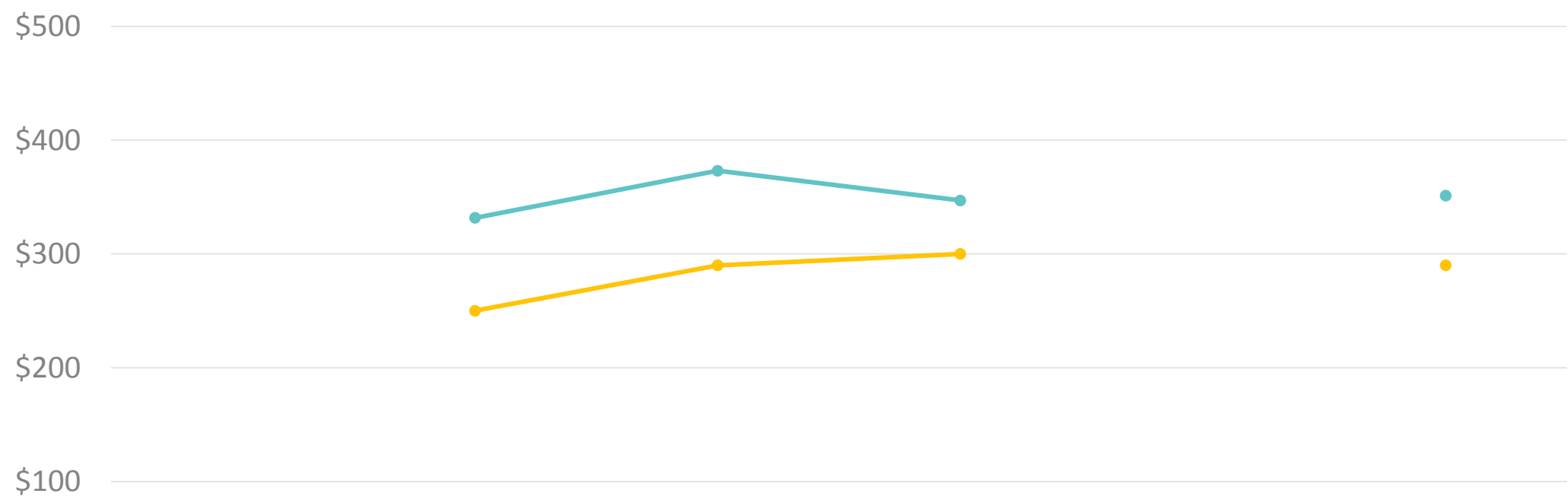
ONISLE – PER PERSON/ PER DAY TRACKING



ONISLE – ACCOMMODATIONS

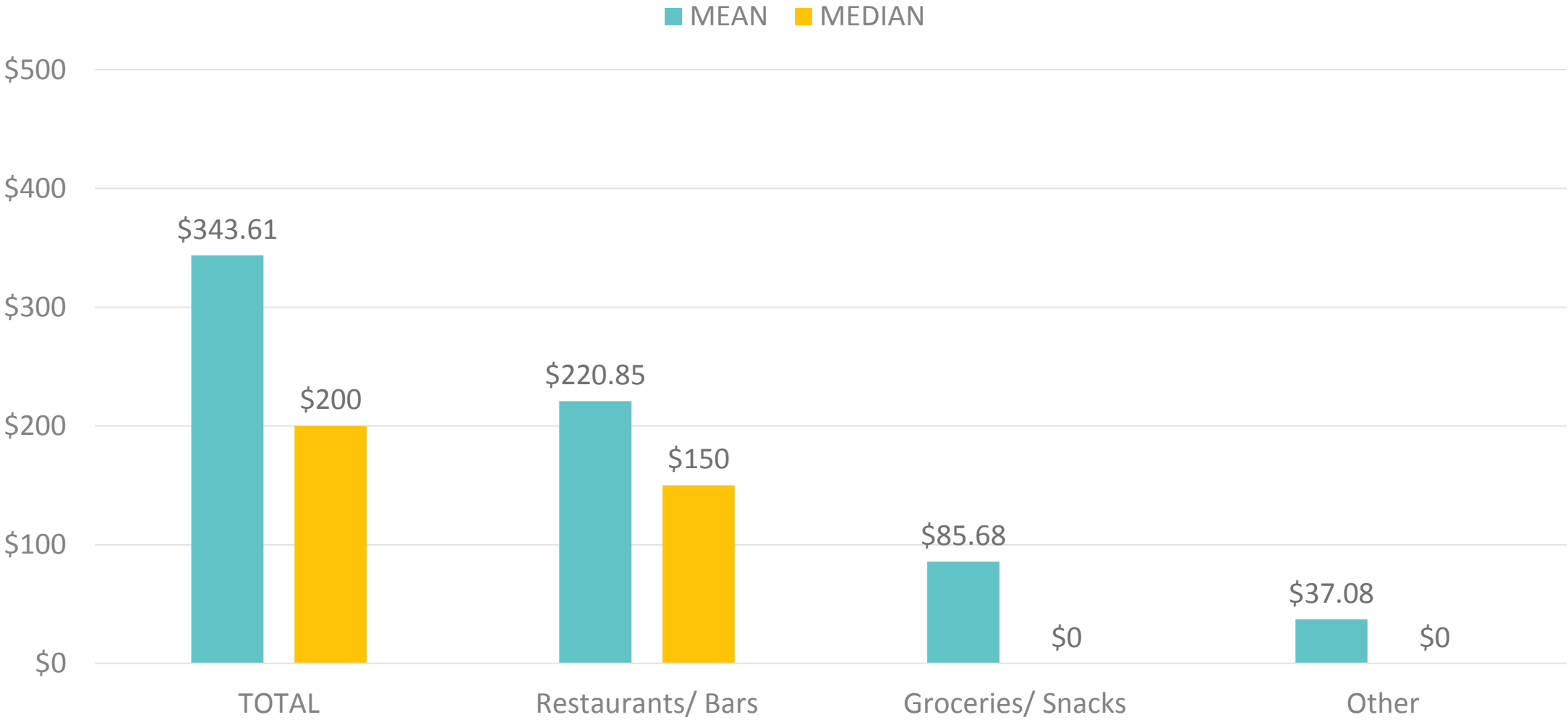


ONISLE – ACCOMMODATIONS TRACKING

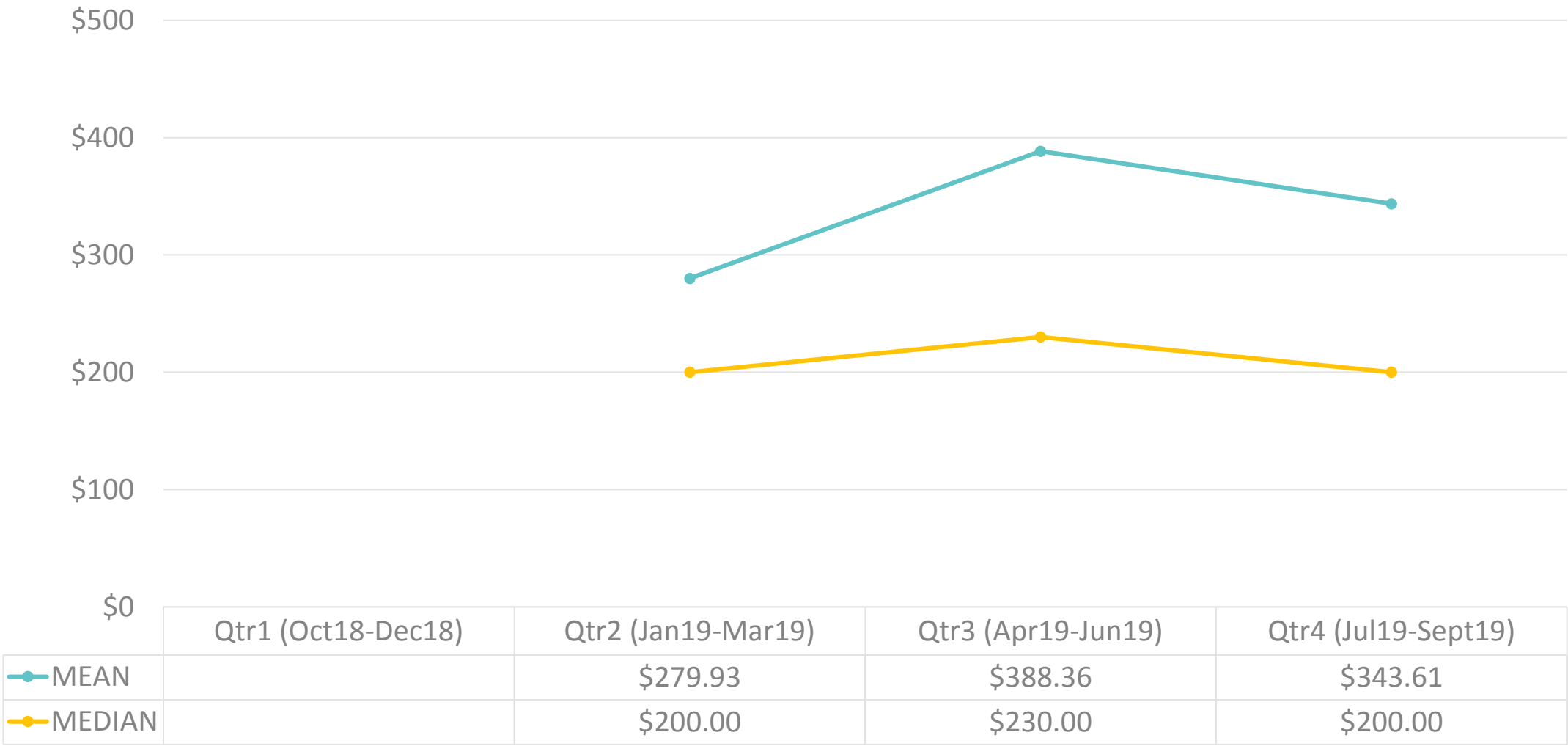


| | Qtr1 (Oct18-Dec18) | Qtr2 (Jan19-Mar19) | Qtr3 (Apr19-Jun19) | Qtr4 (Jul19-Sept19) | | YTD |
|--------|--------------------|--------------------|--------------------|---------------------|--|----------|
| MEAN | | \$331.67 | \$373.15 | \$346.99 | | \$351.14 |
| MEDIAN | | \$250.00 | \$290.00 | \$300.00 | | \$290.00 |

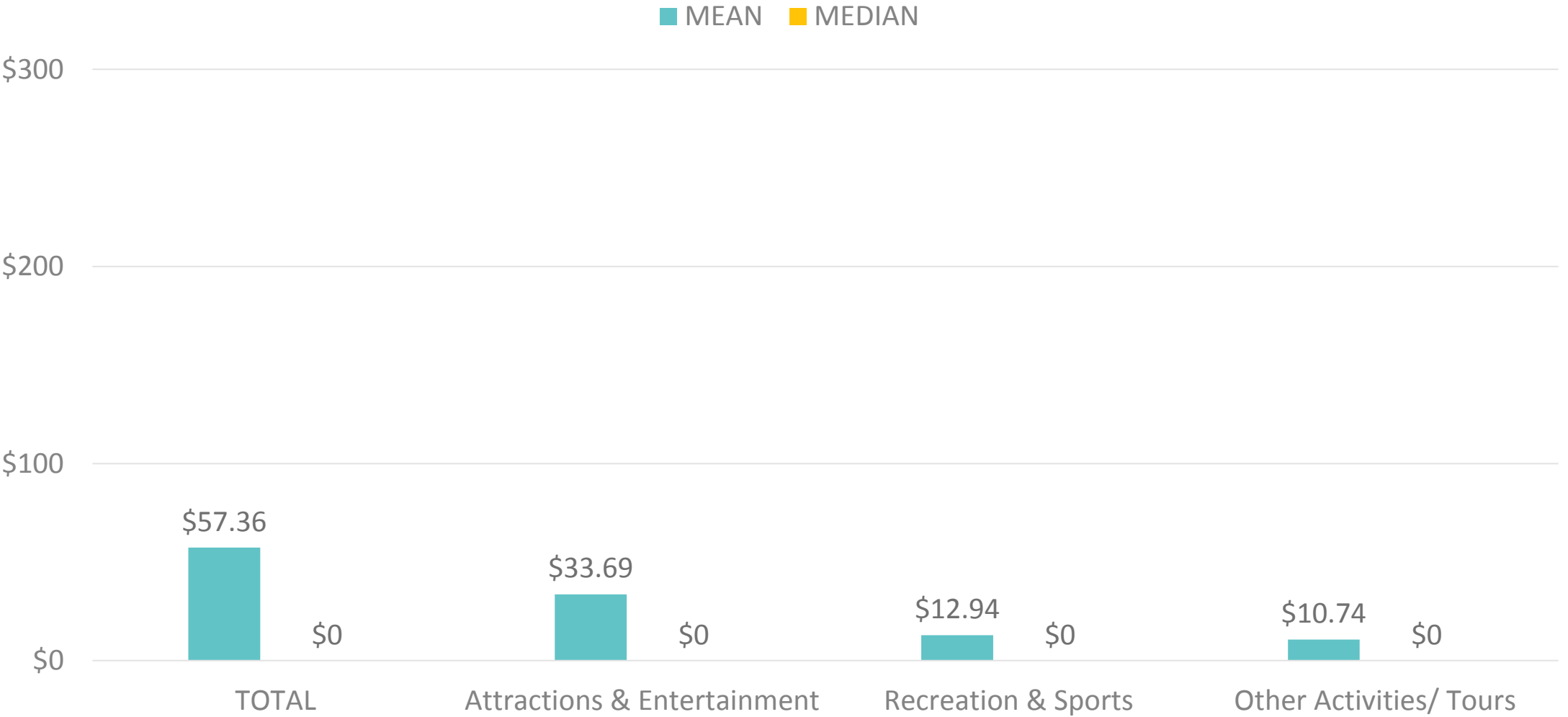
ONISLE – FOOD & BEVERAGE



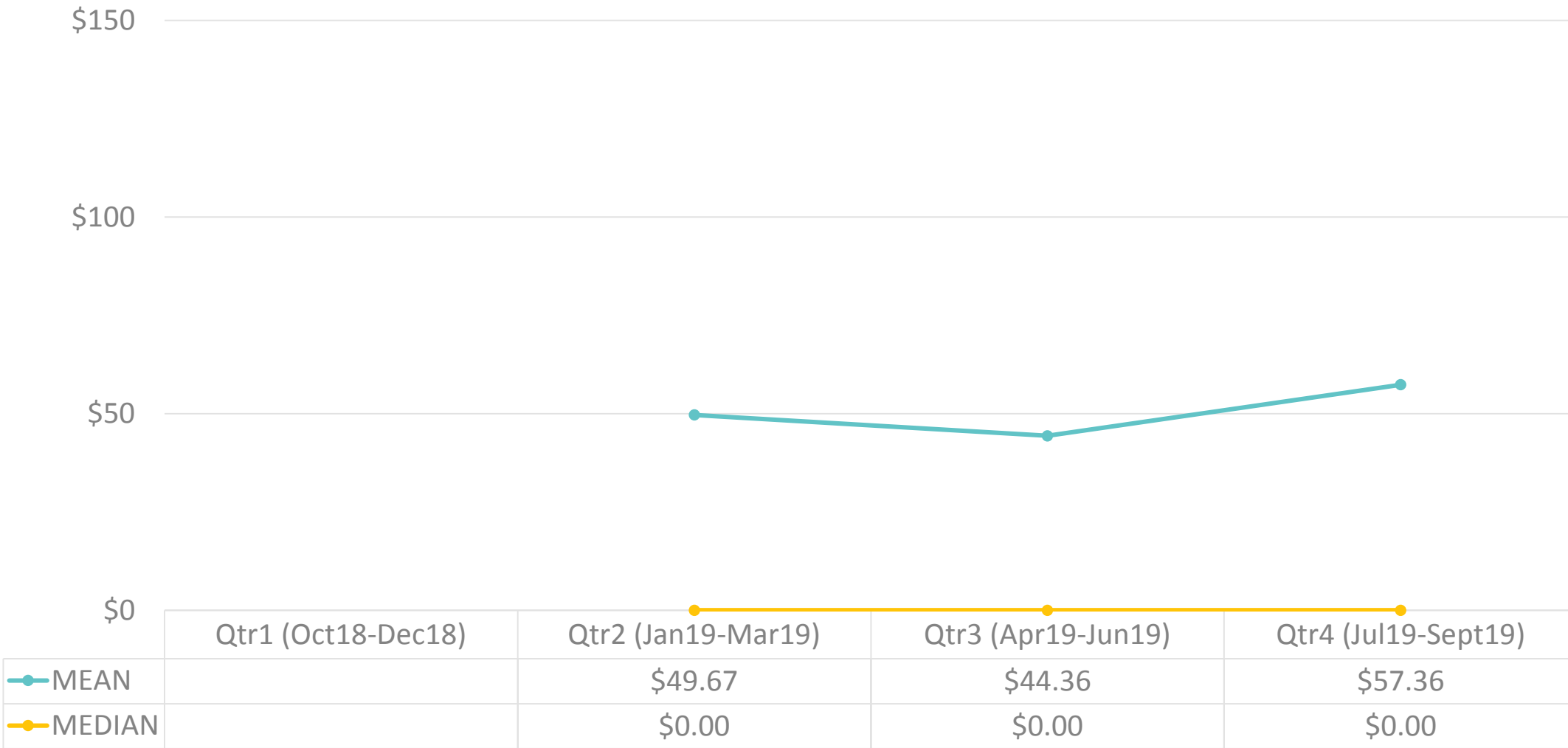
ONISLE – TOTAL FOOD & BEVERAGE TRACKING



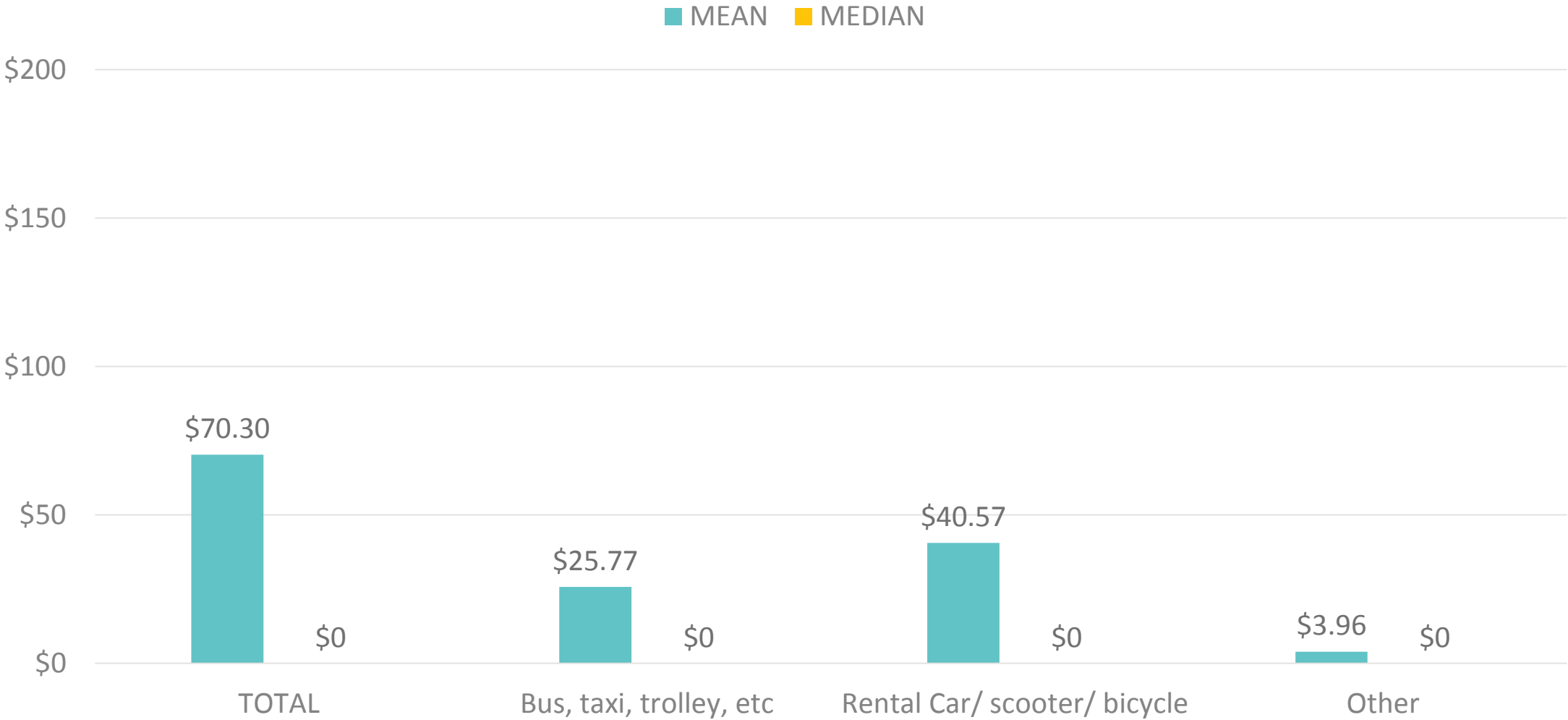
ONISLE – ENTERTAINMENT & RECREATION



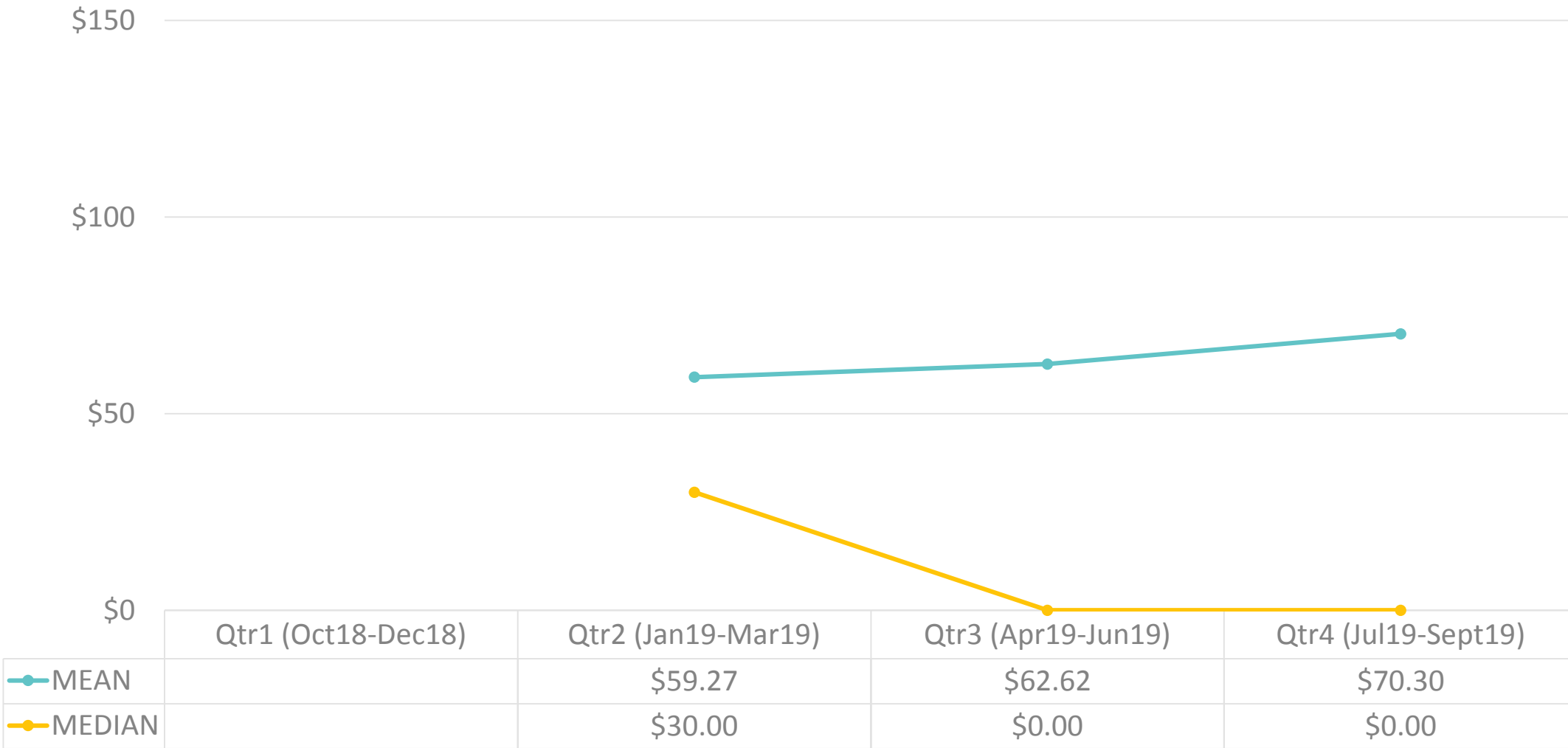
ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING



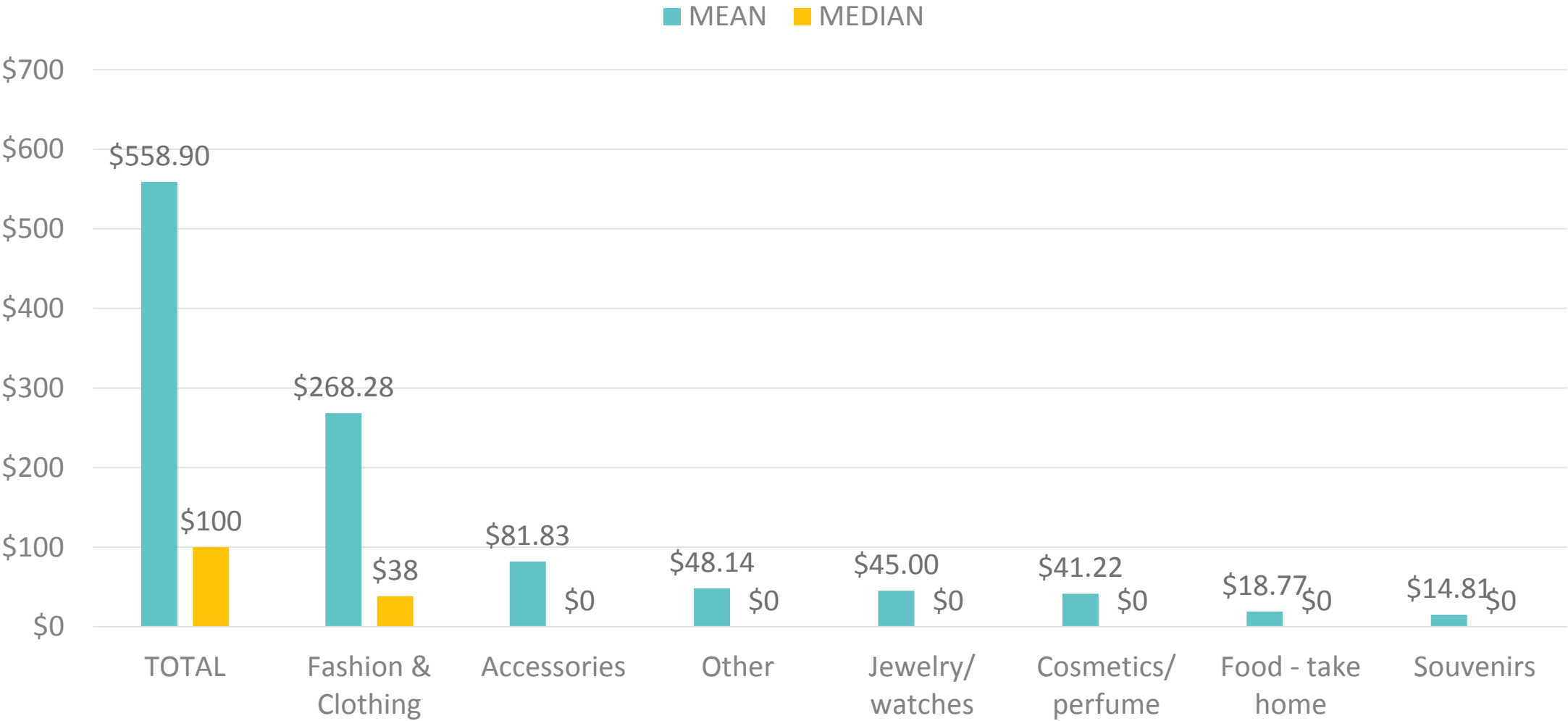
ONISLE – TRANSPORTATION



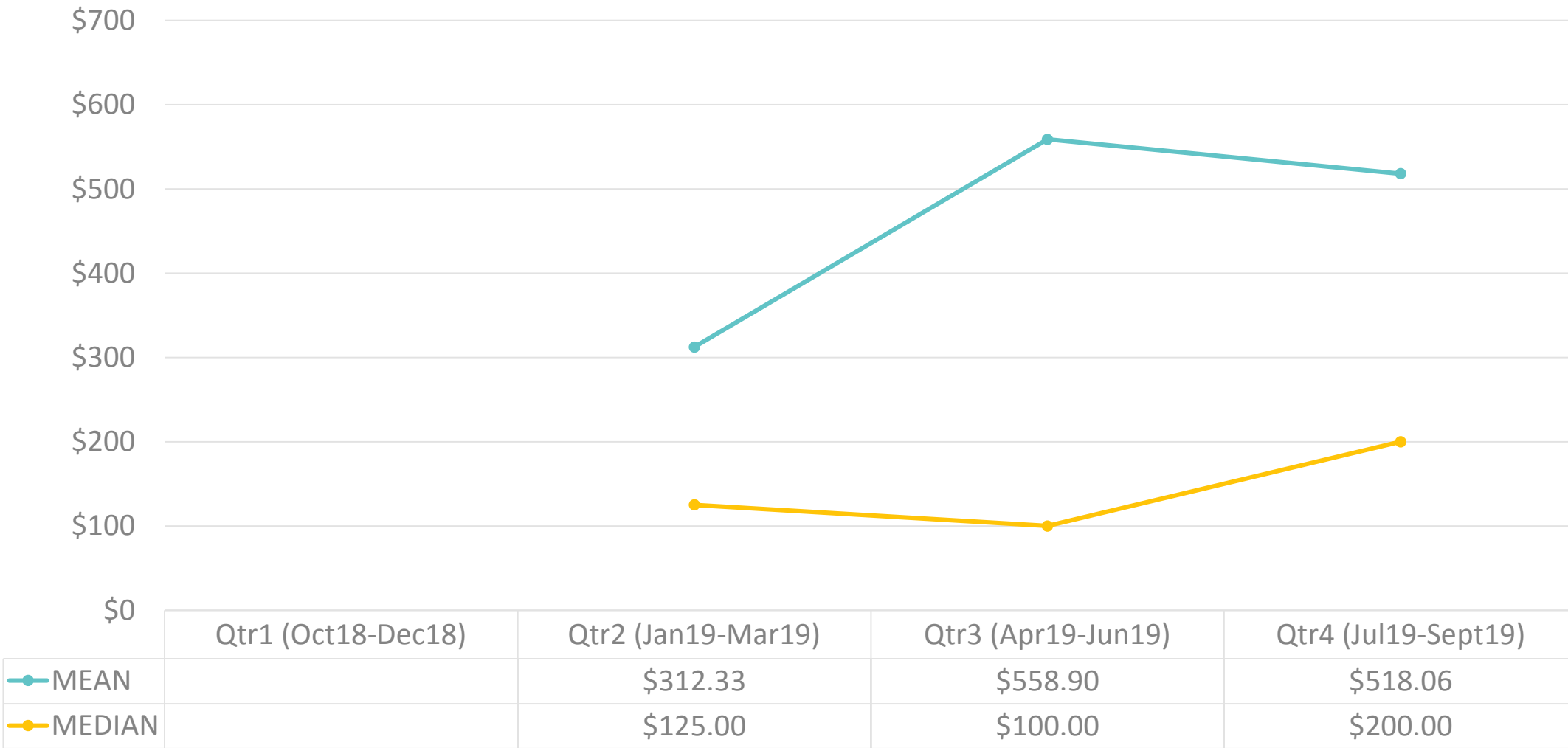
ONISLE – TOTAL TRANSPORTATION TRACKING



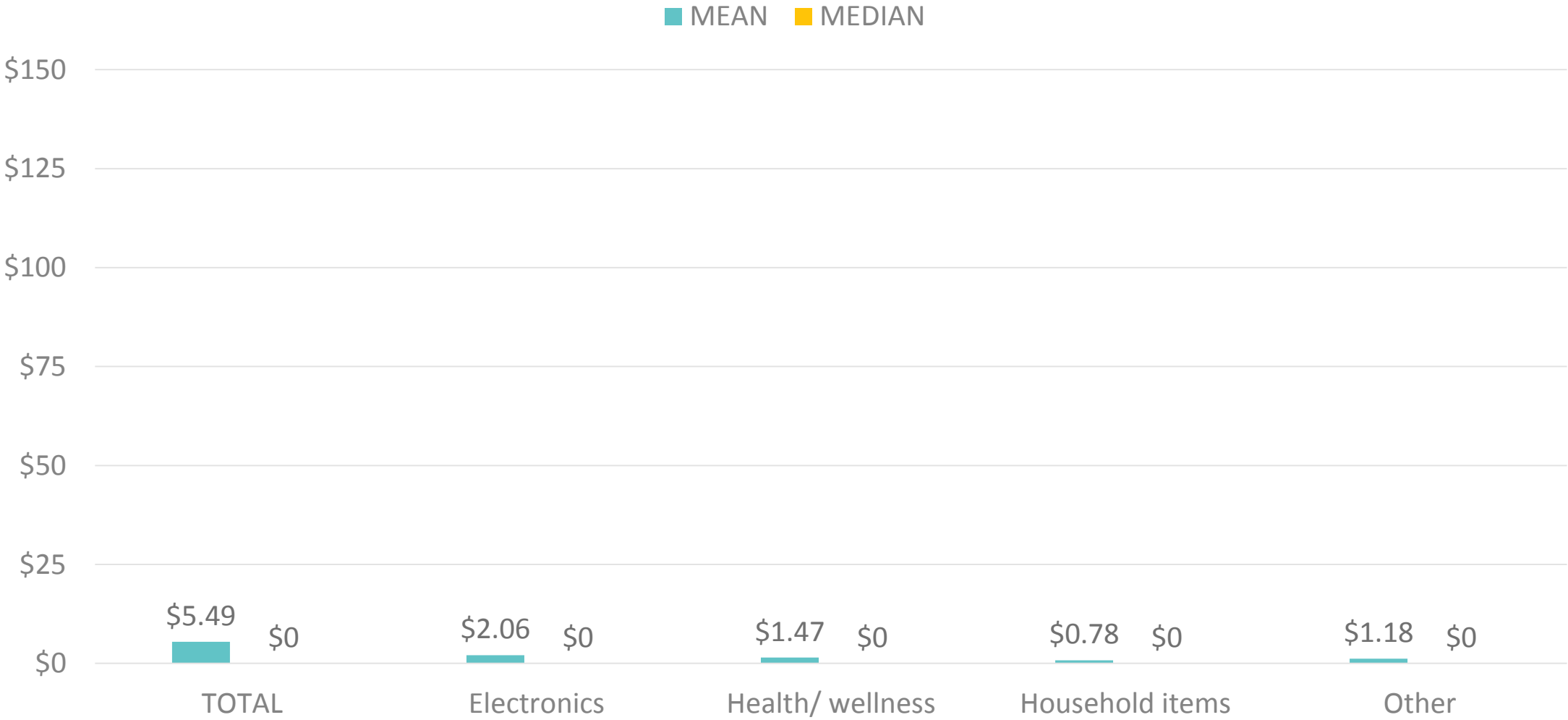
ONISLE – SHOPPING



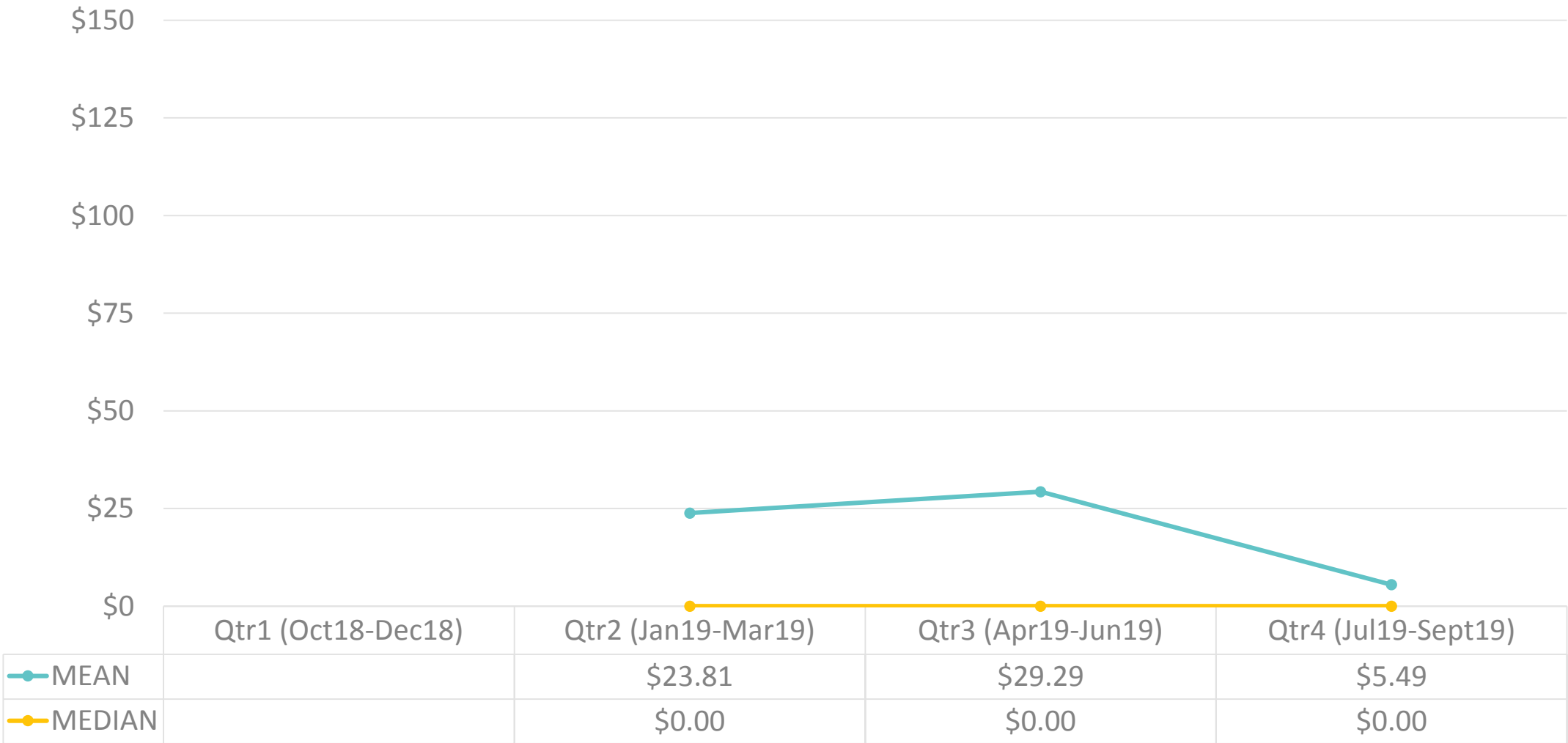
ONISLE – TOTAL SHOPPING TRACKING



ONISLE – MISCELLANEOUS



ONISLE – MISCELLANEOUS TRACKING



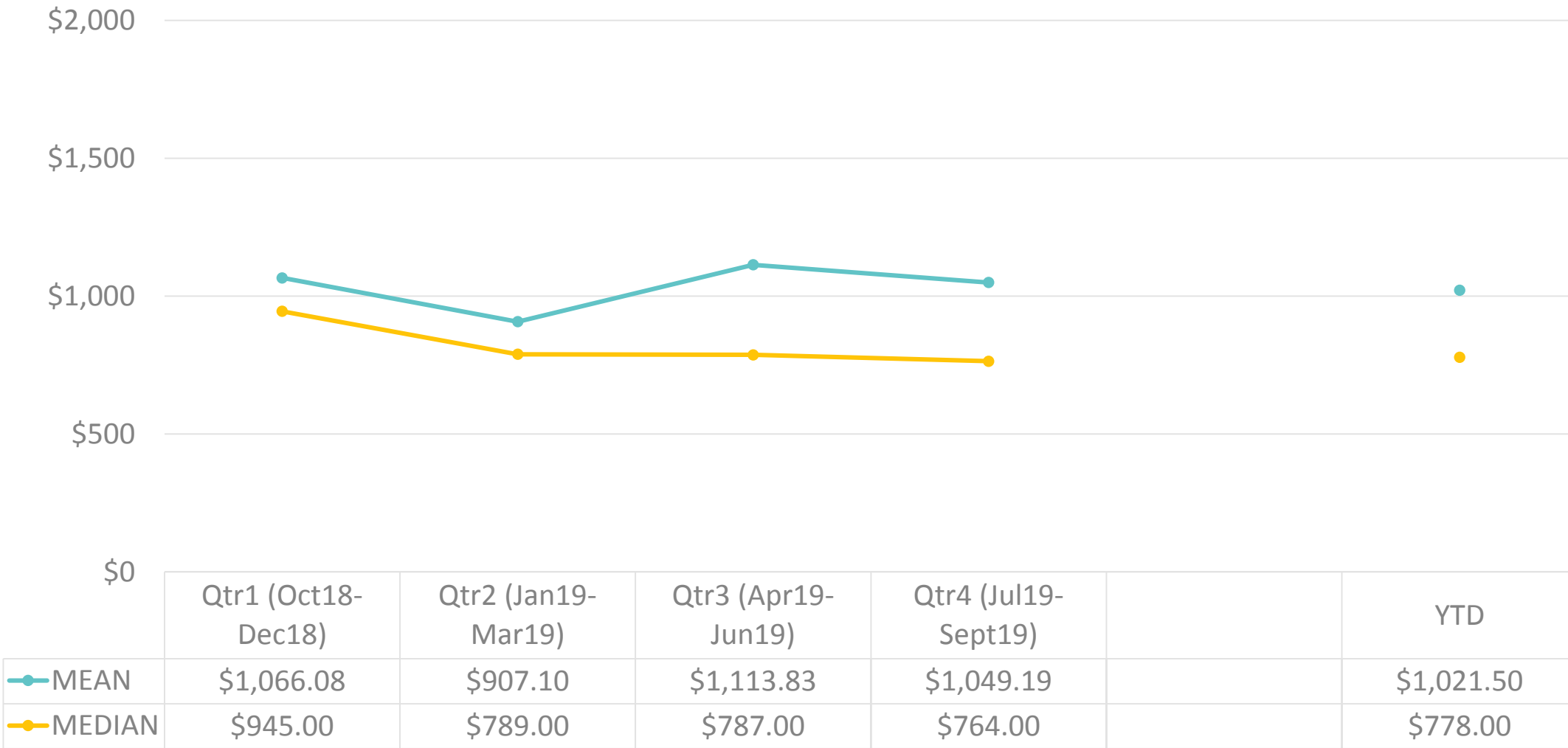
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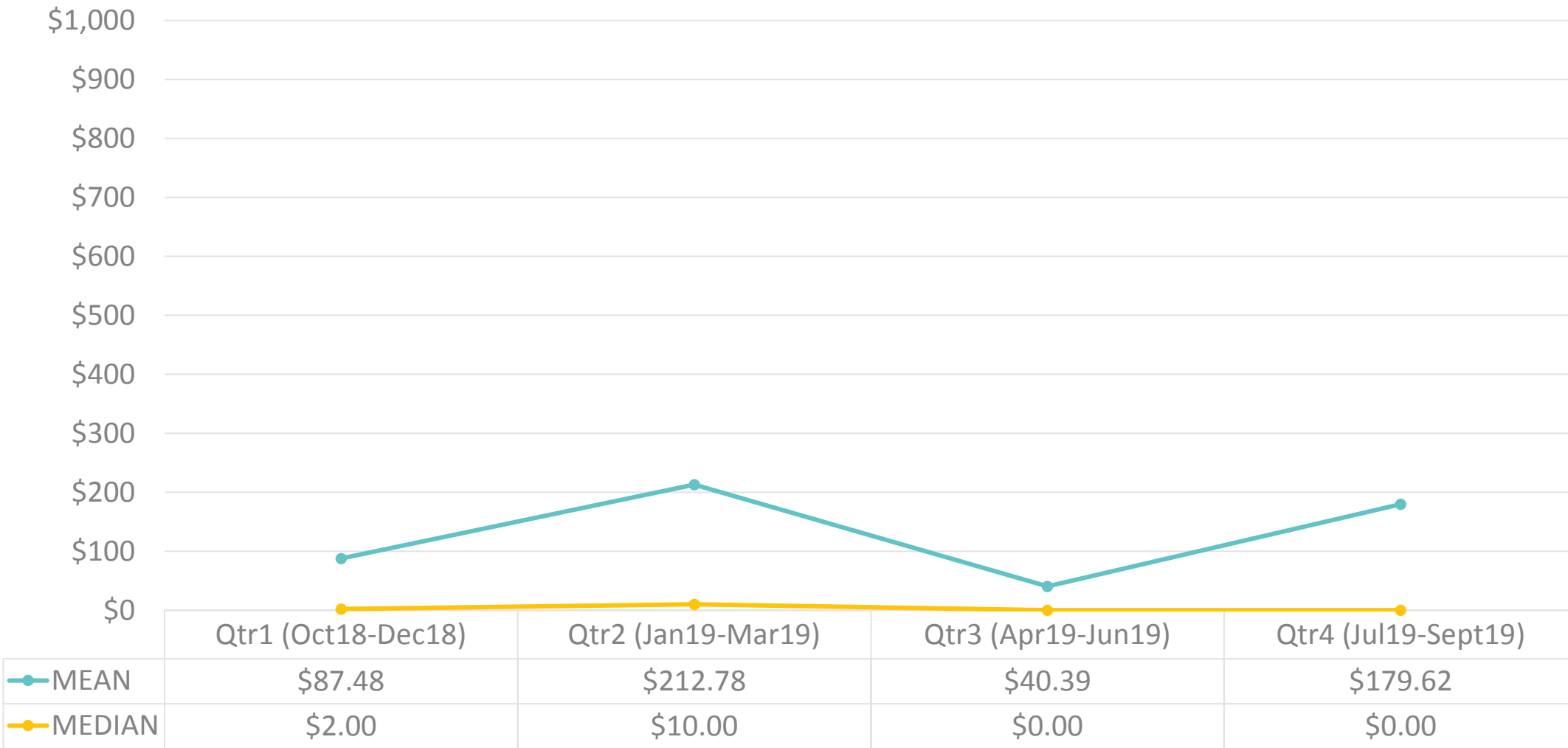
TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

- \$1,049.19 = Mean average per person
- \$764.00 = Median amount spent per person

TOTAL EXPENDITURES PER PERSON TRACKING



GUAM AIRPORT EXPENDITURE TRACKING



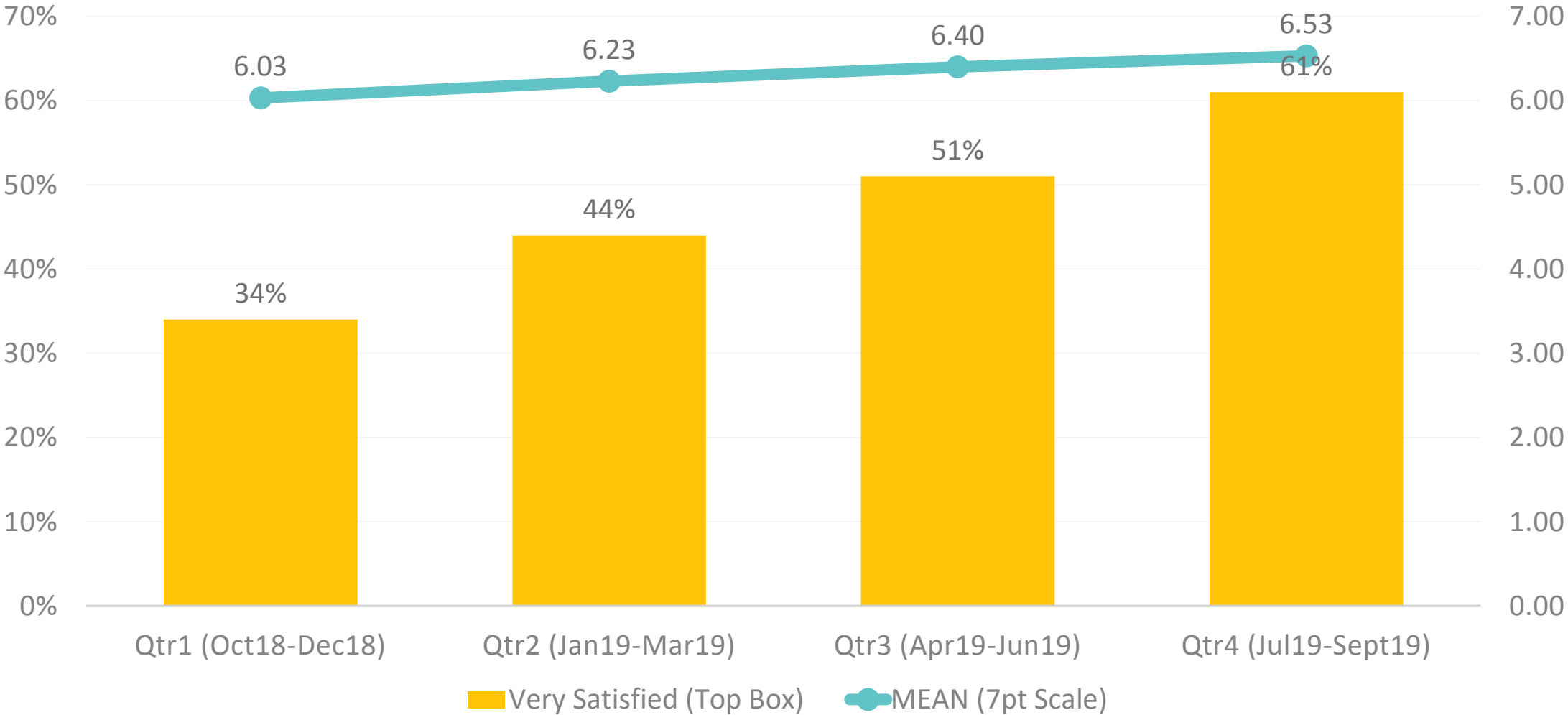


SECTION 4

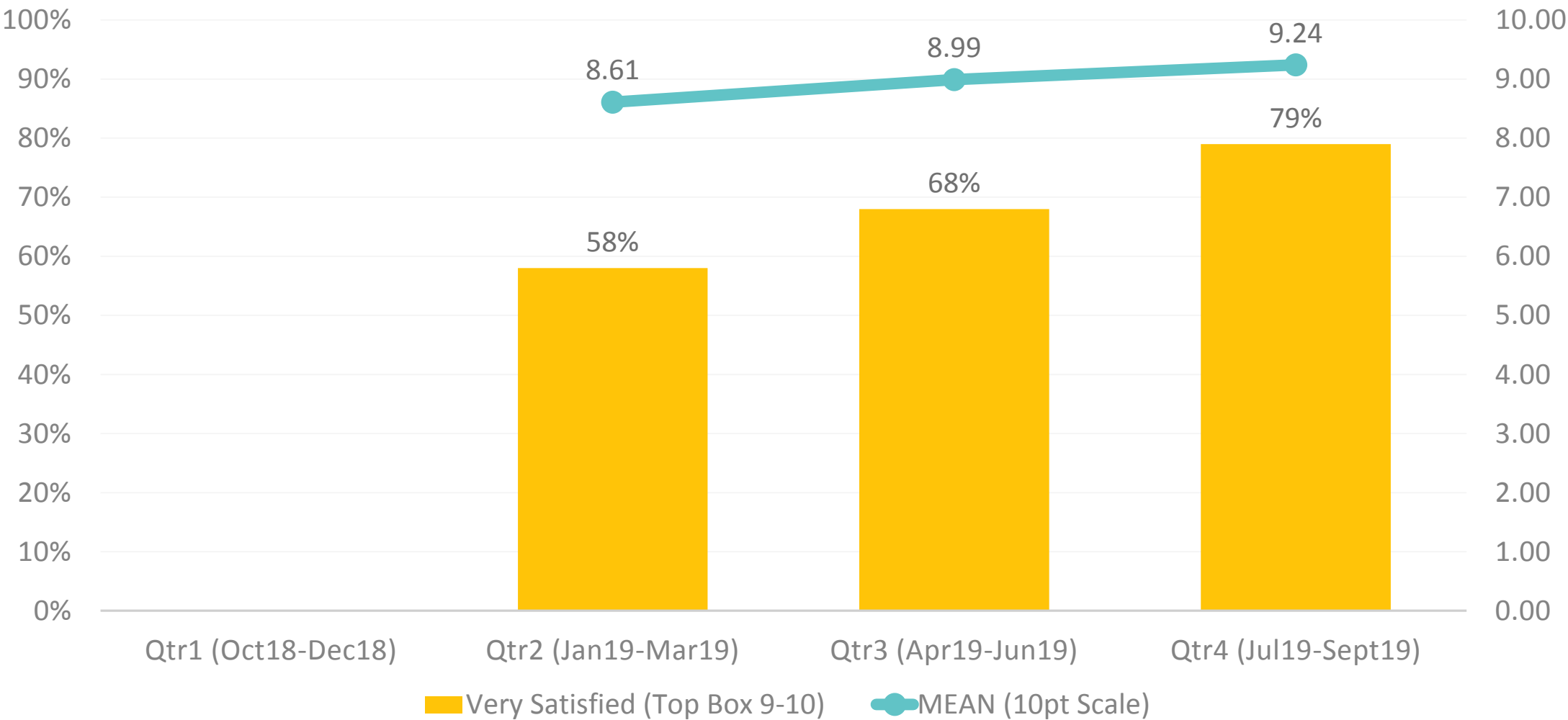
VISITOR SATISFACTION



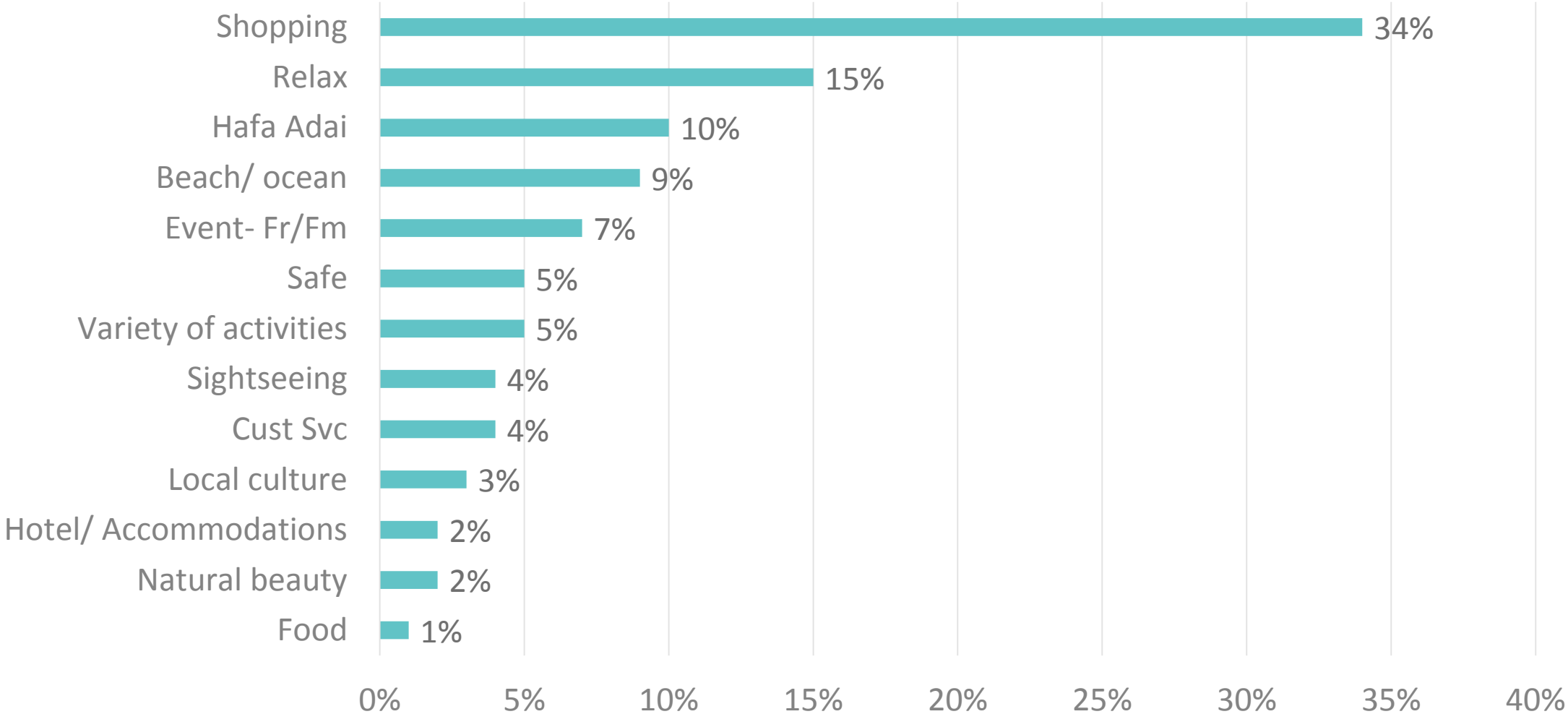
OVERALL SATISFACTION – 7PT SCALE



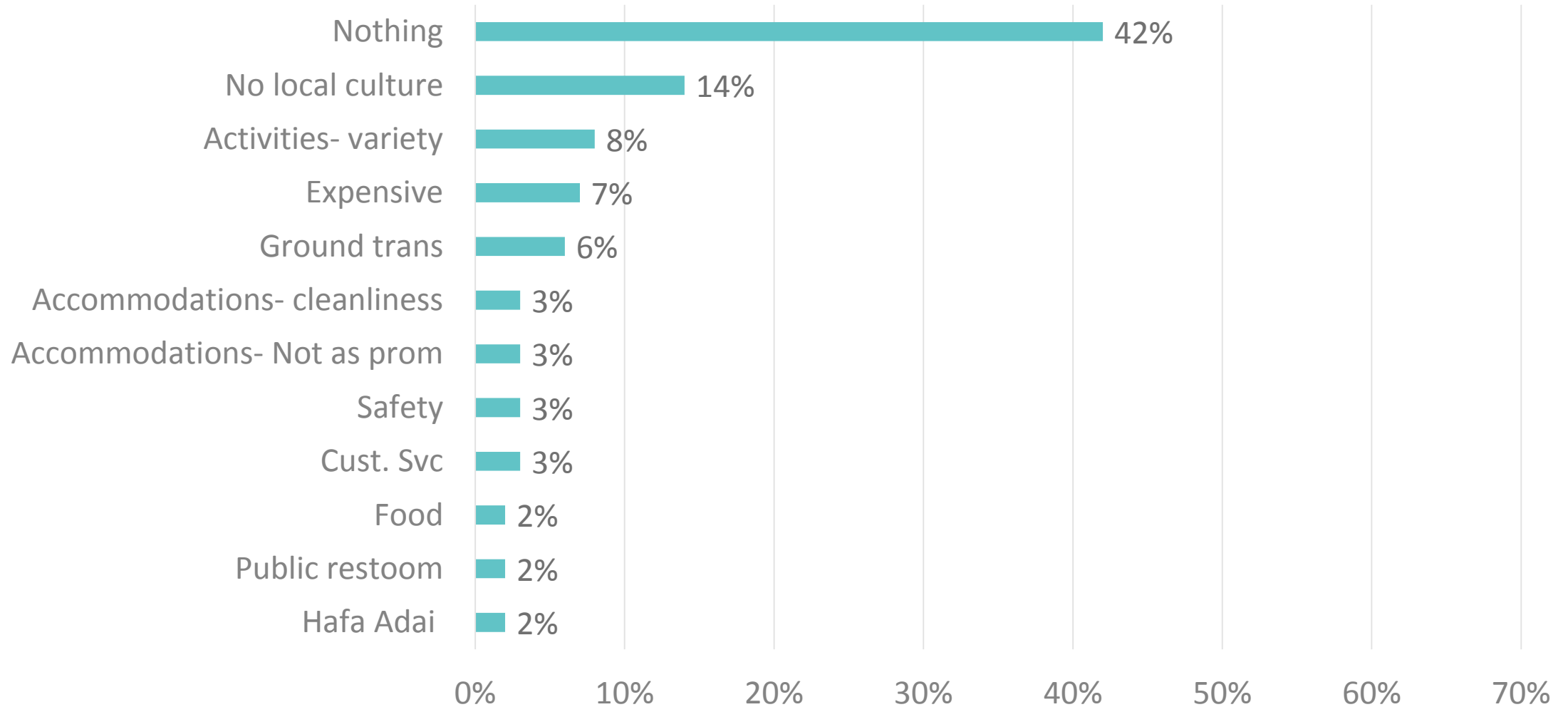
OVERALL SATISFACTION – 10PT SCALE



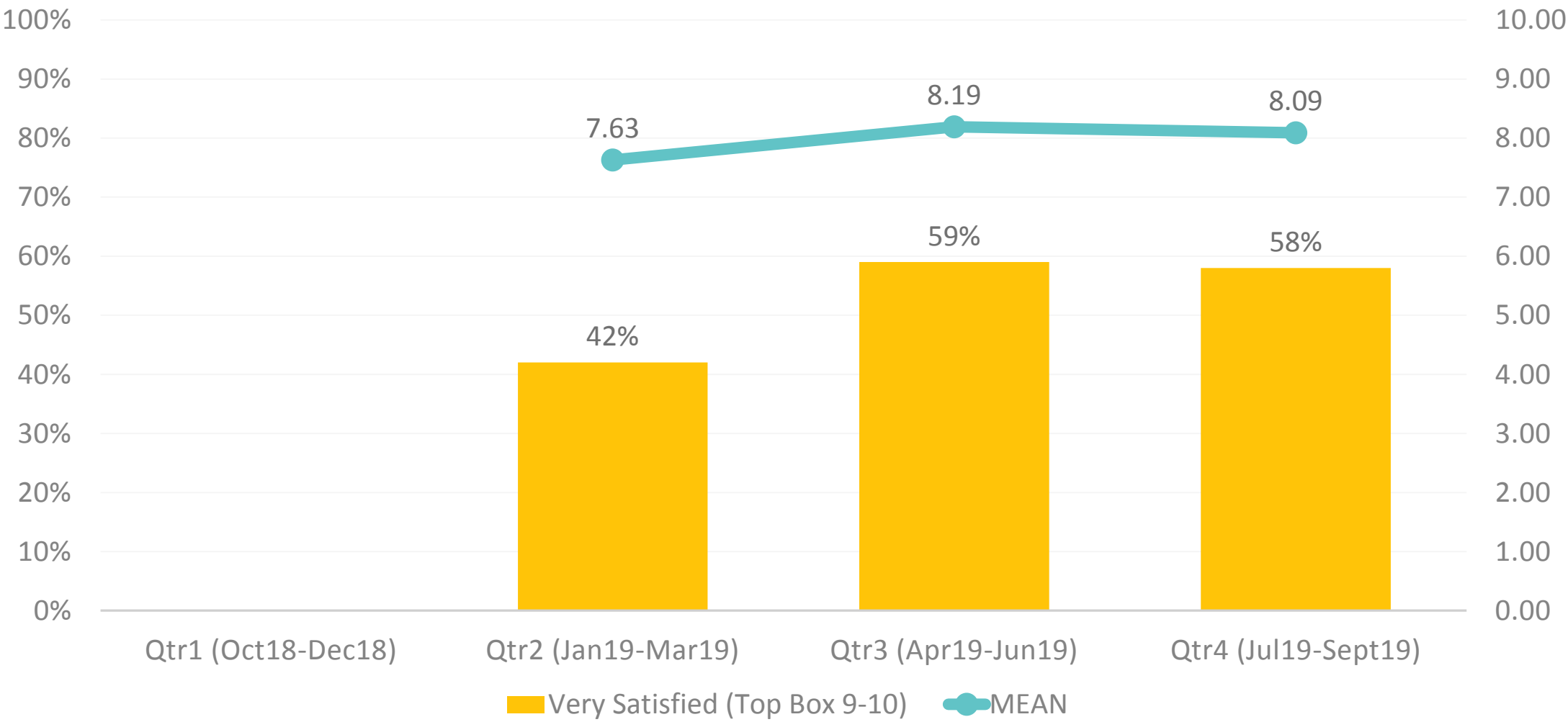
SWOT – POSITIVE ASPECT OF TRIP



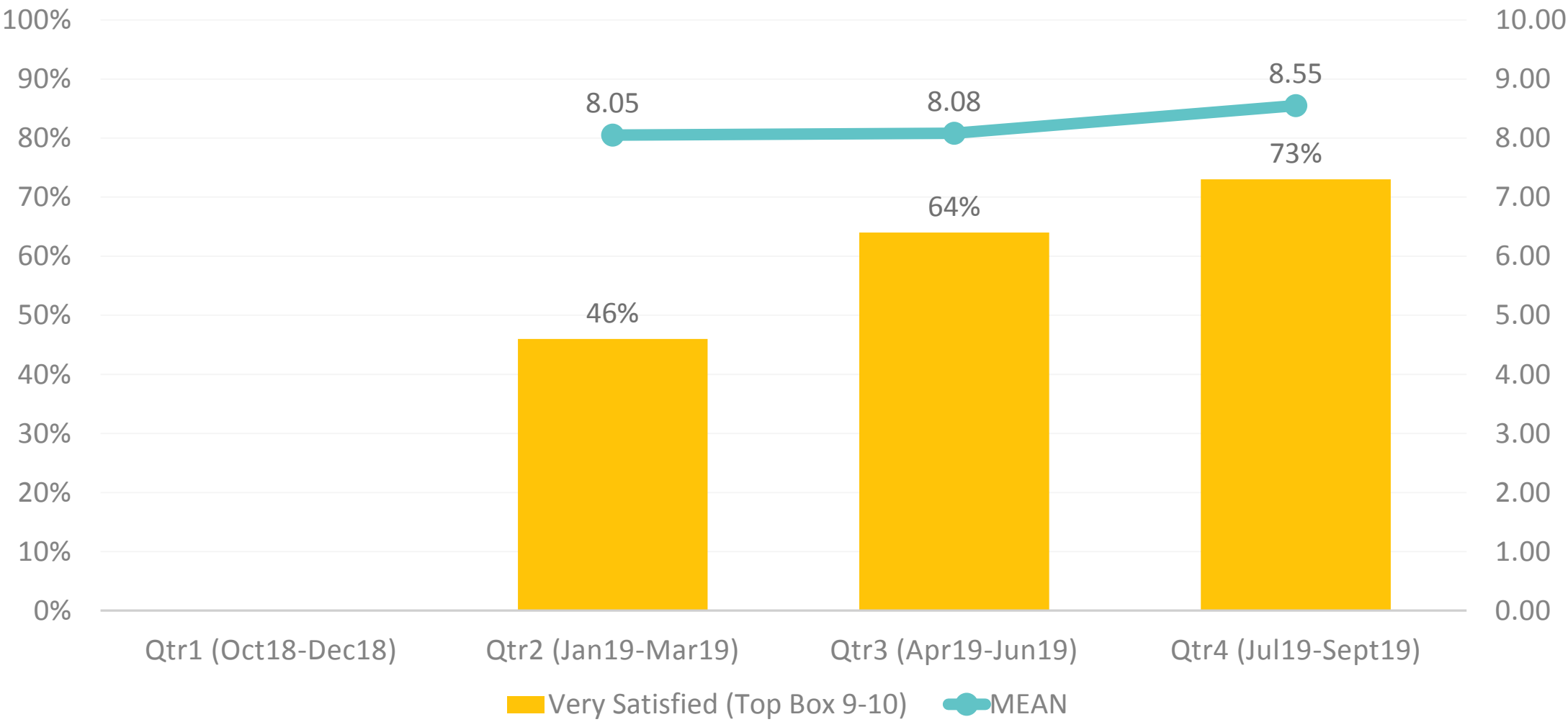
SWOT – NEGATIVE ASPECT OF TRIP



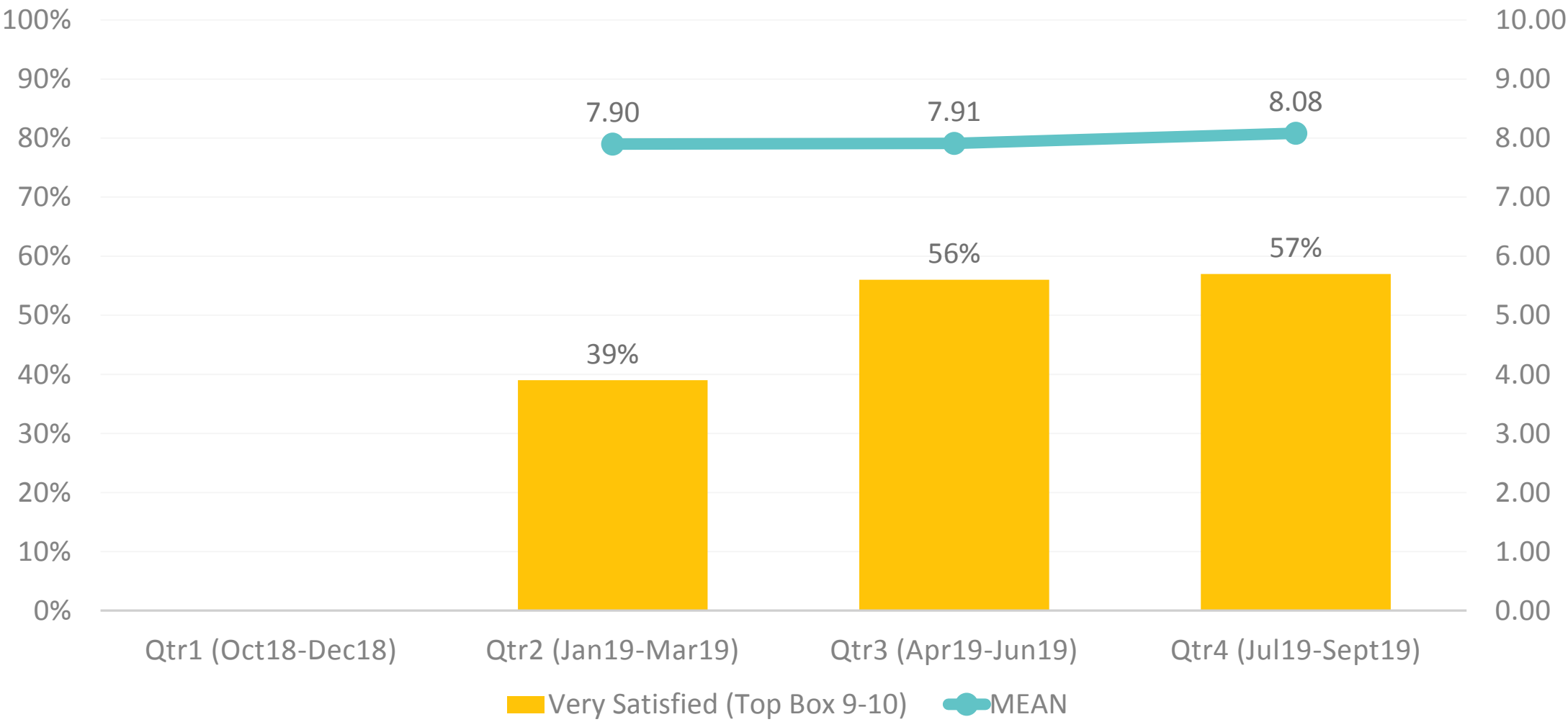
SATISFACTION – ENTERTAINMENT



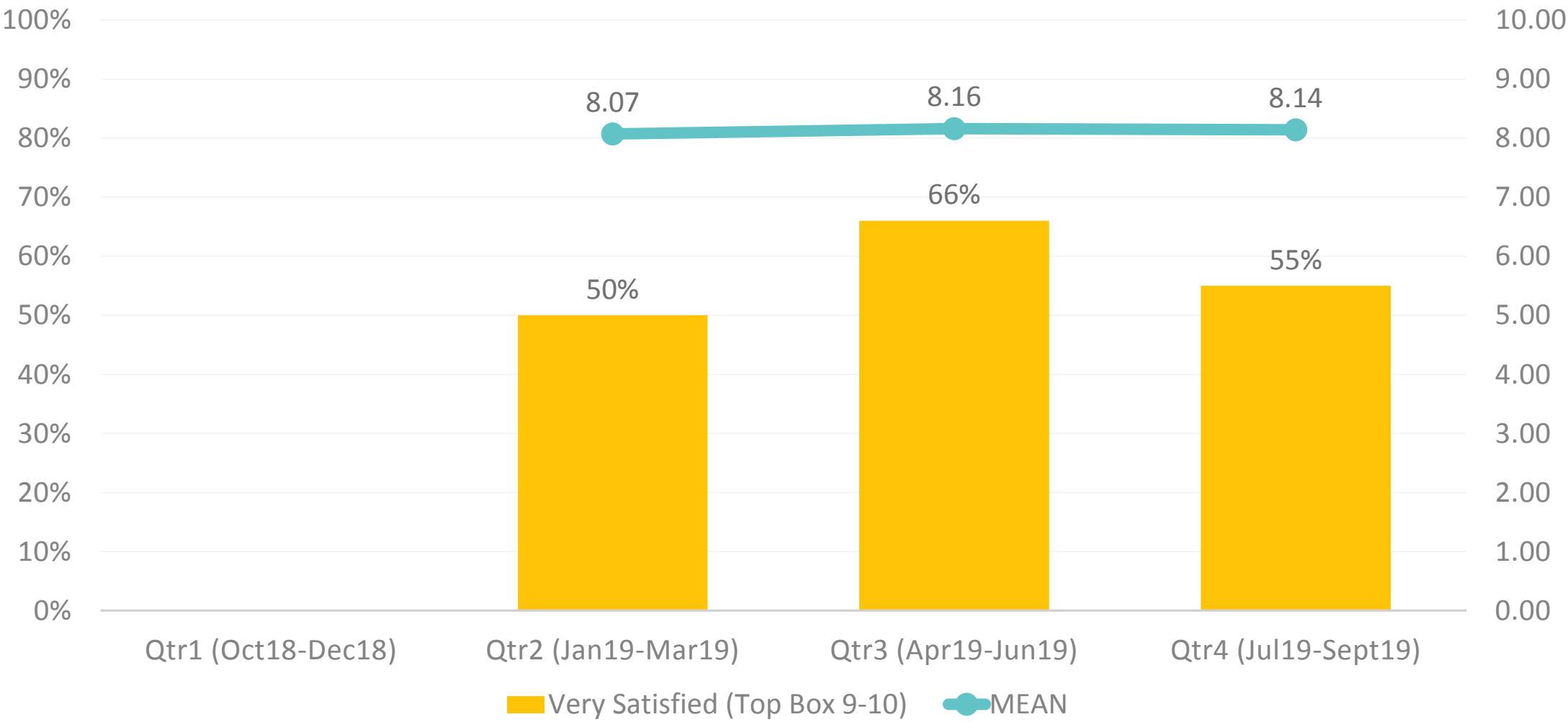
SATISFACTION – SHOPPING



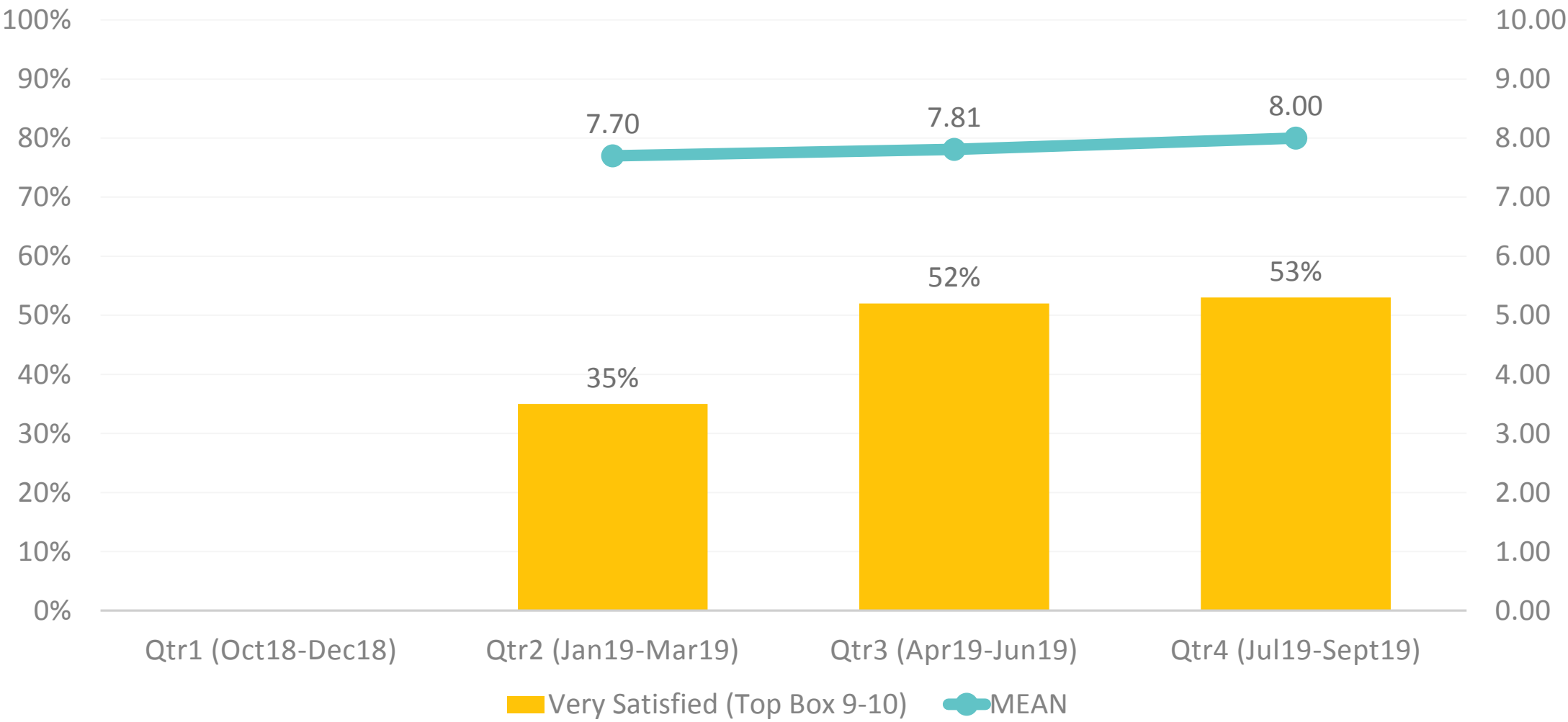
SATISFACTION – DINING



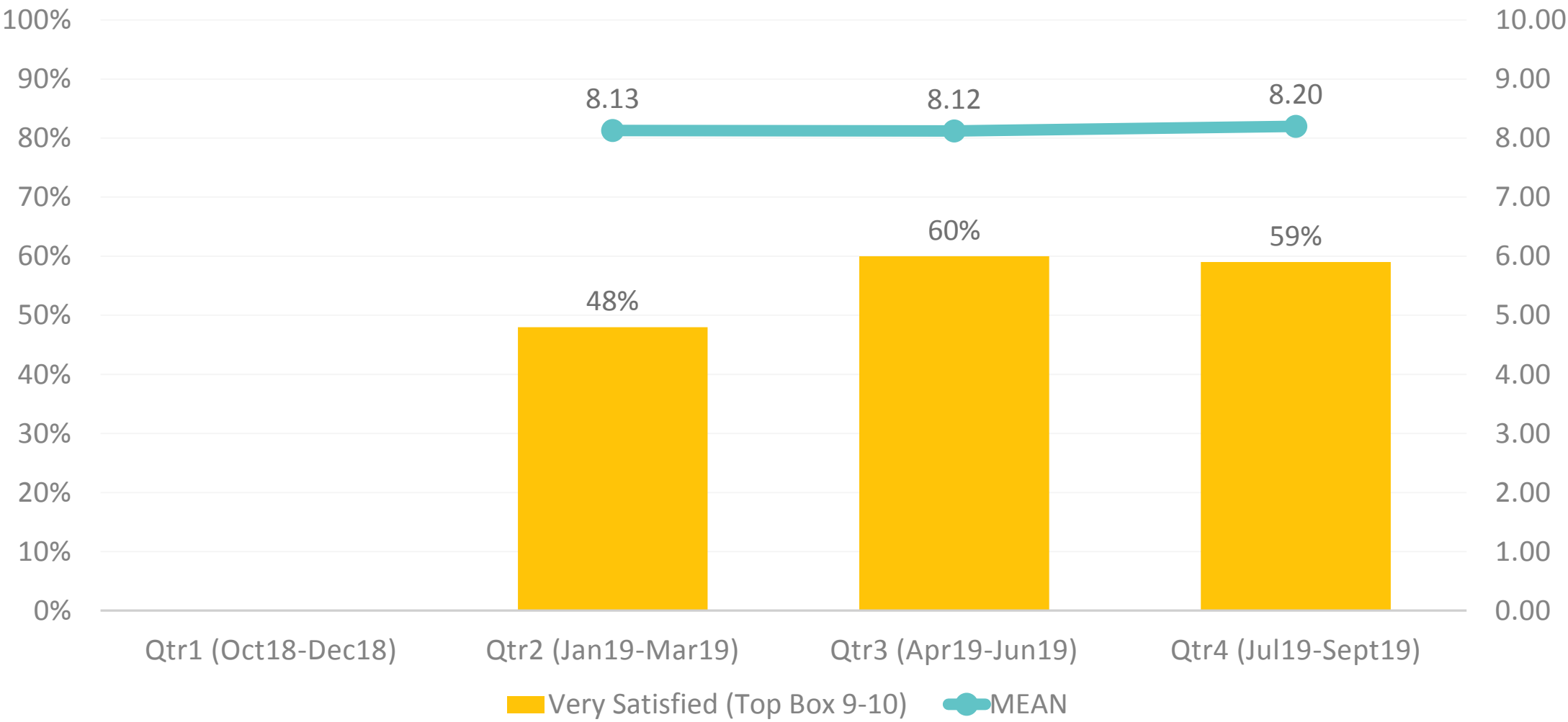
SATISFACTION – BEACHES



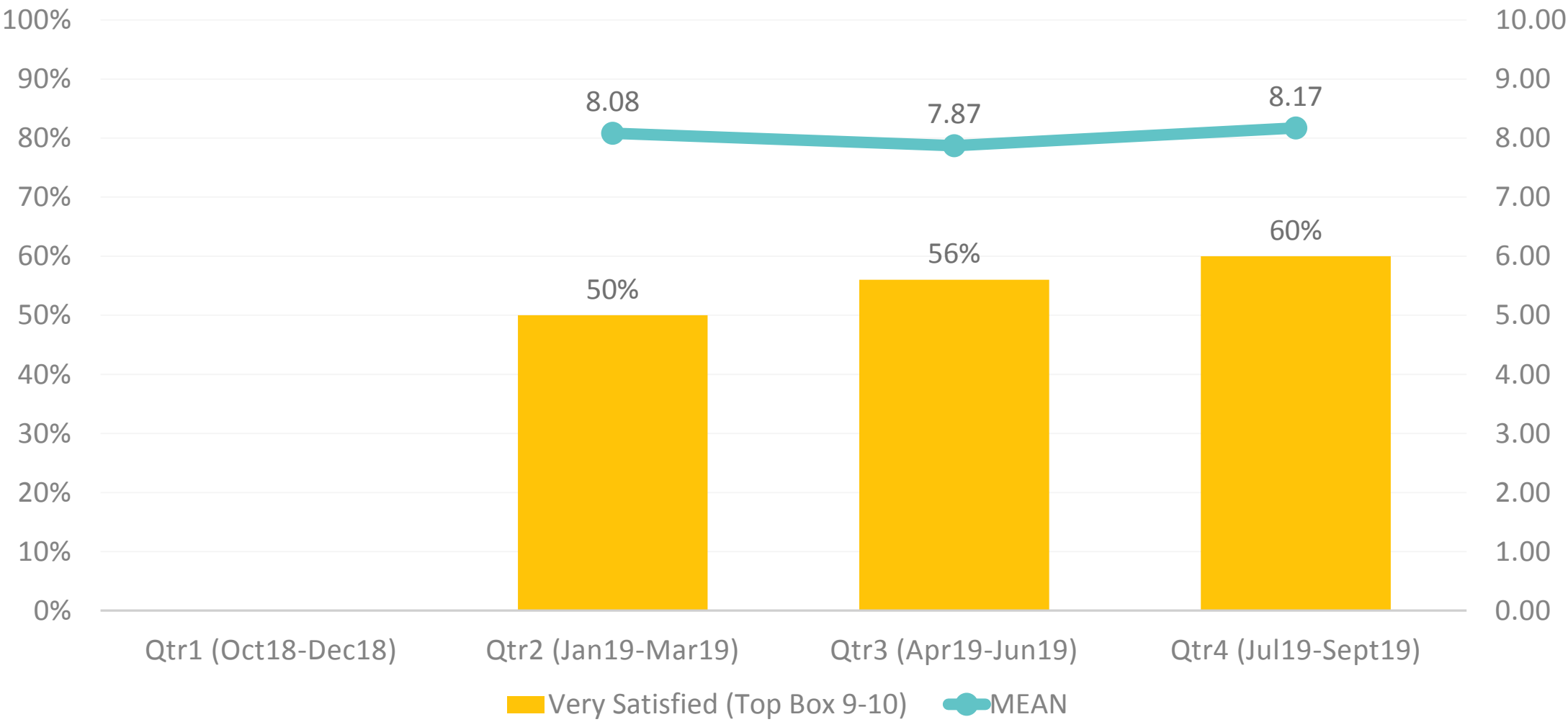
SATISFACTION – PARKS



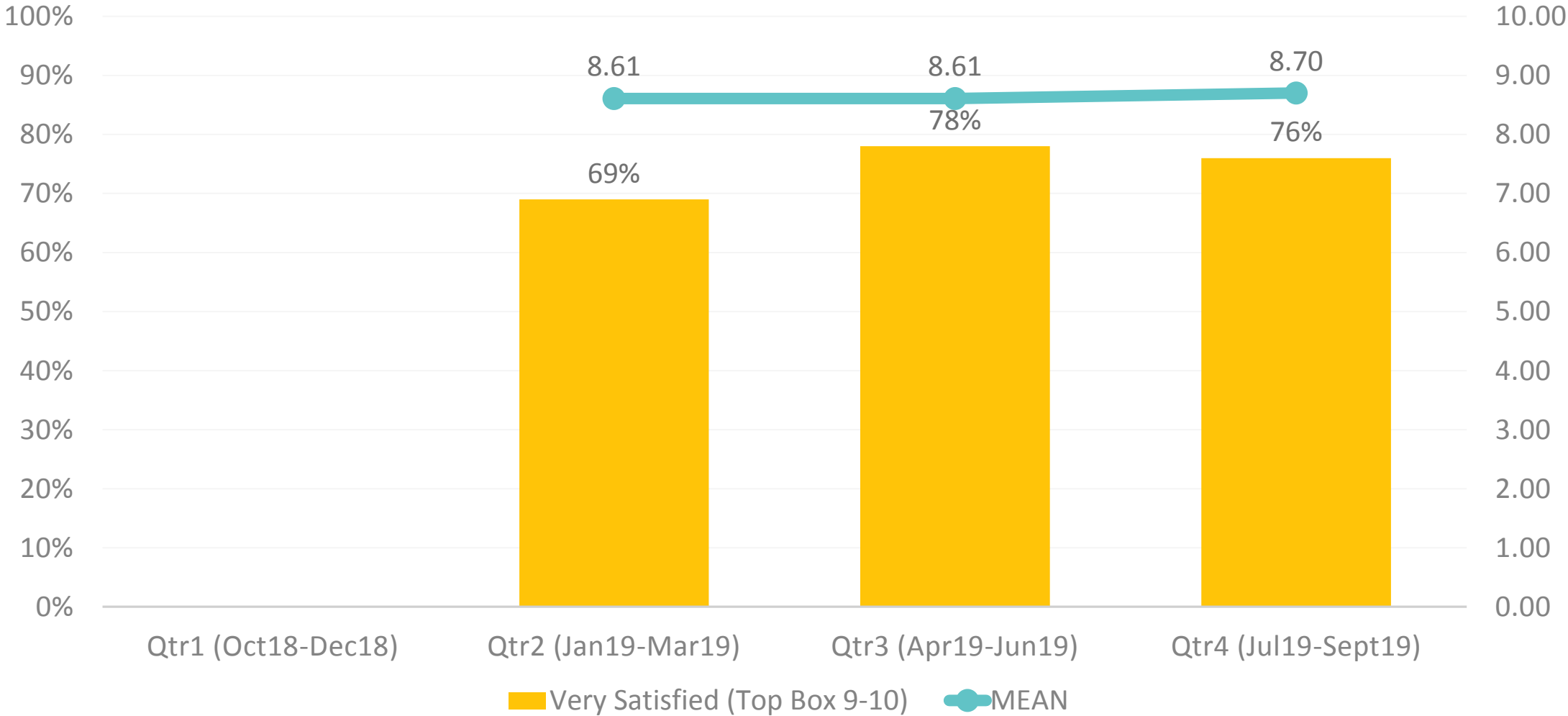
SATISFACTION – ROADS



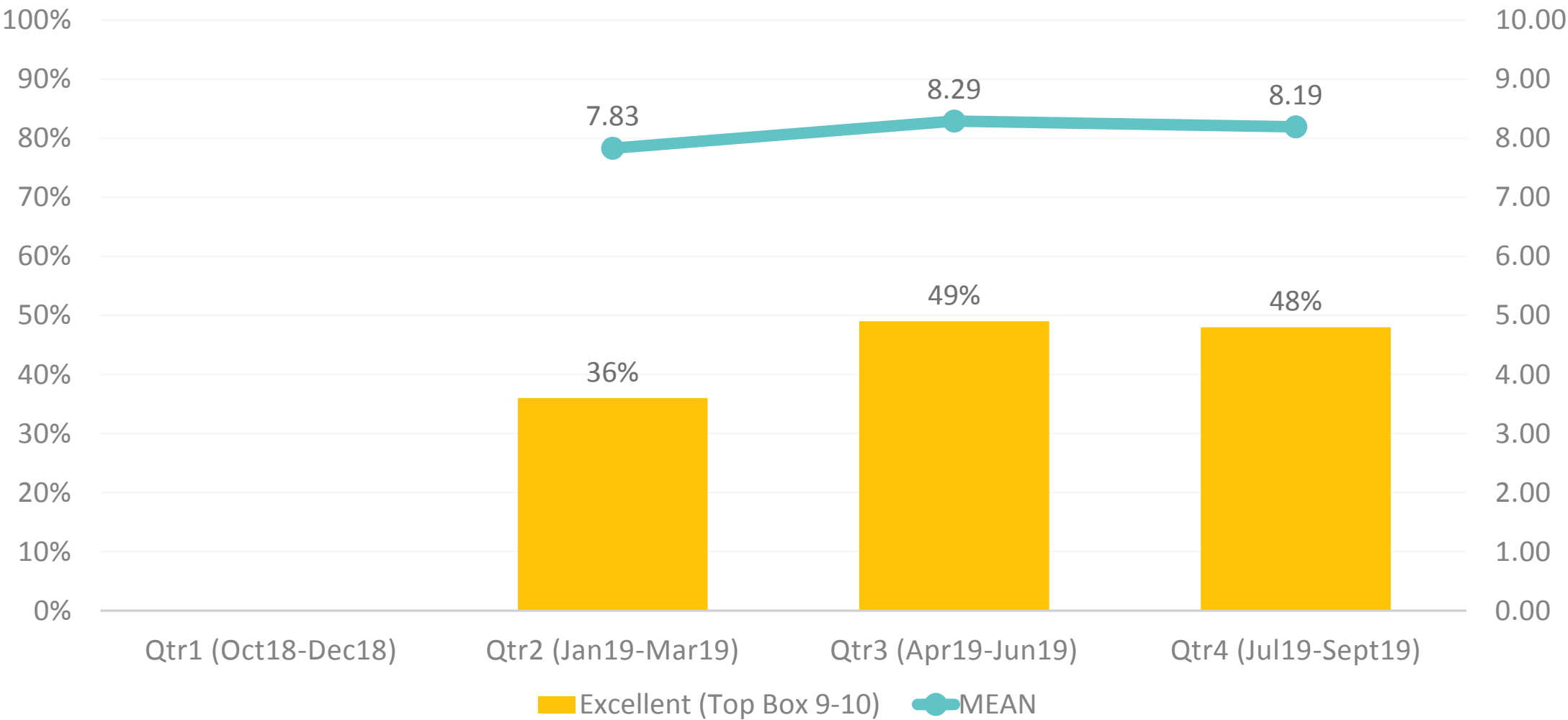
SATISFACTION – SIGHTSEEING AREAS



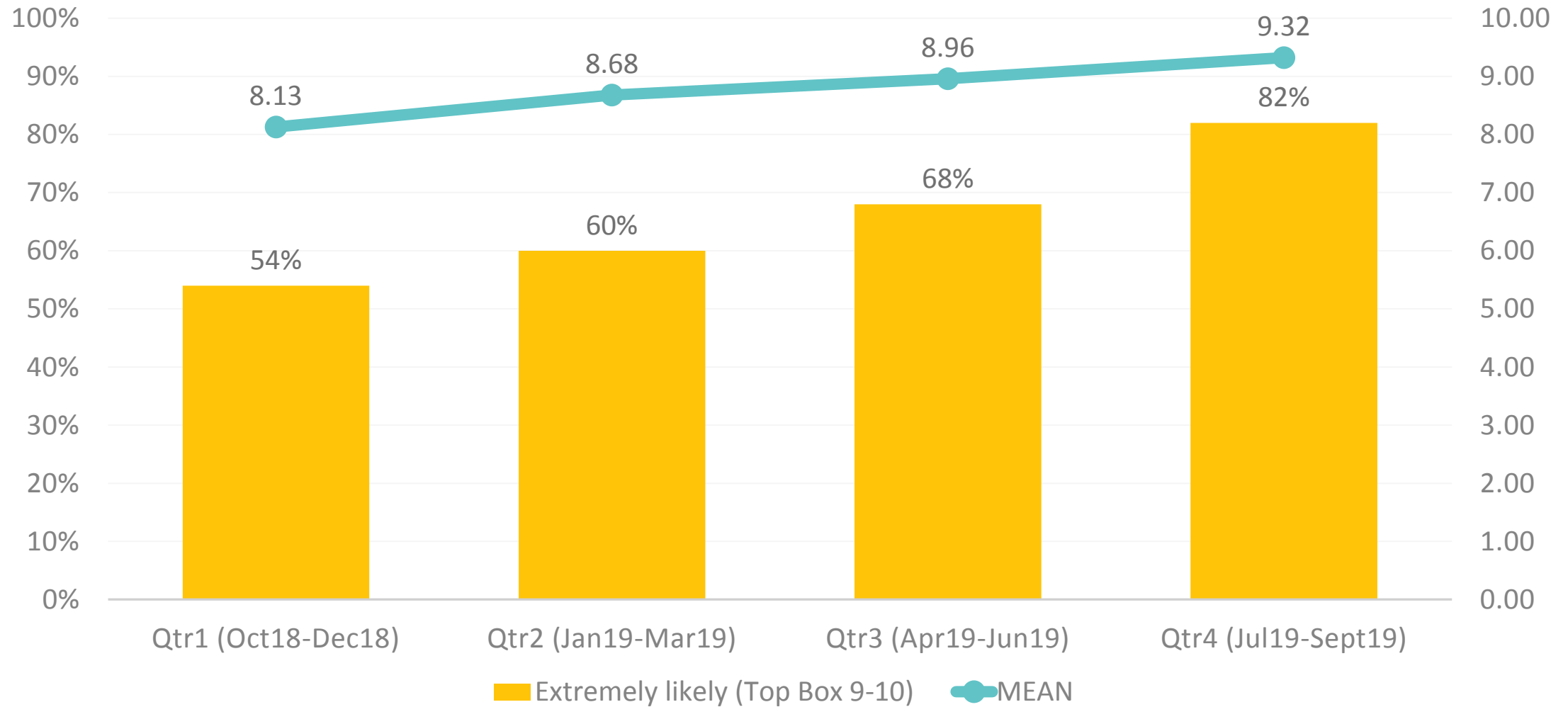
SATISFACTION – SAFETY & SECURITY



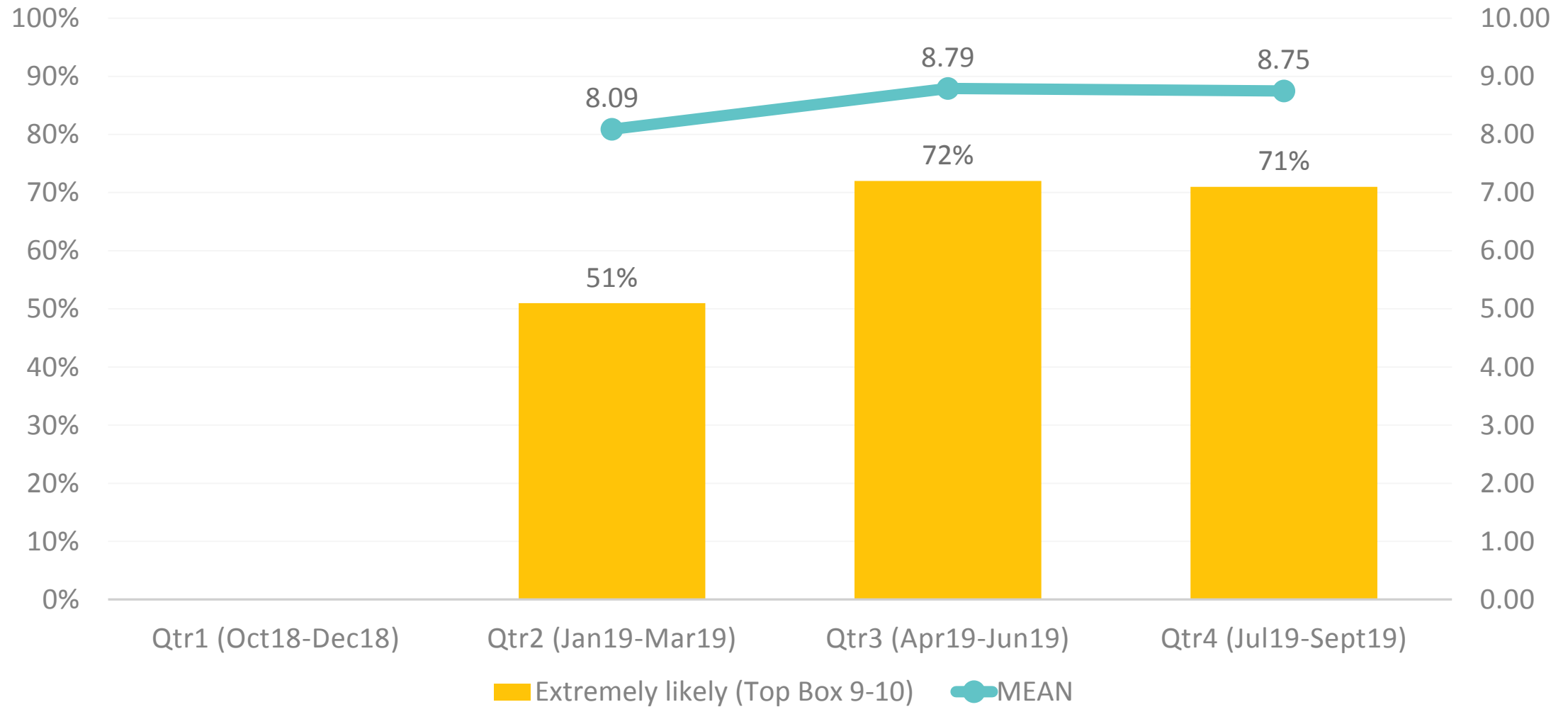
SATISFACTION – ACCOMMODATIONS



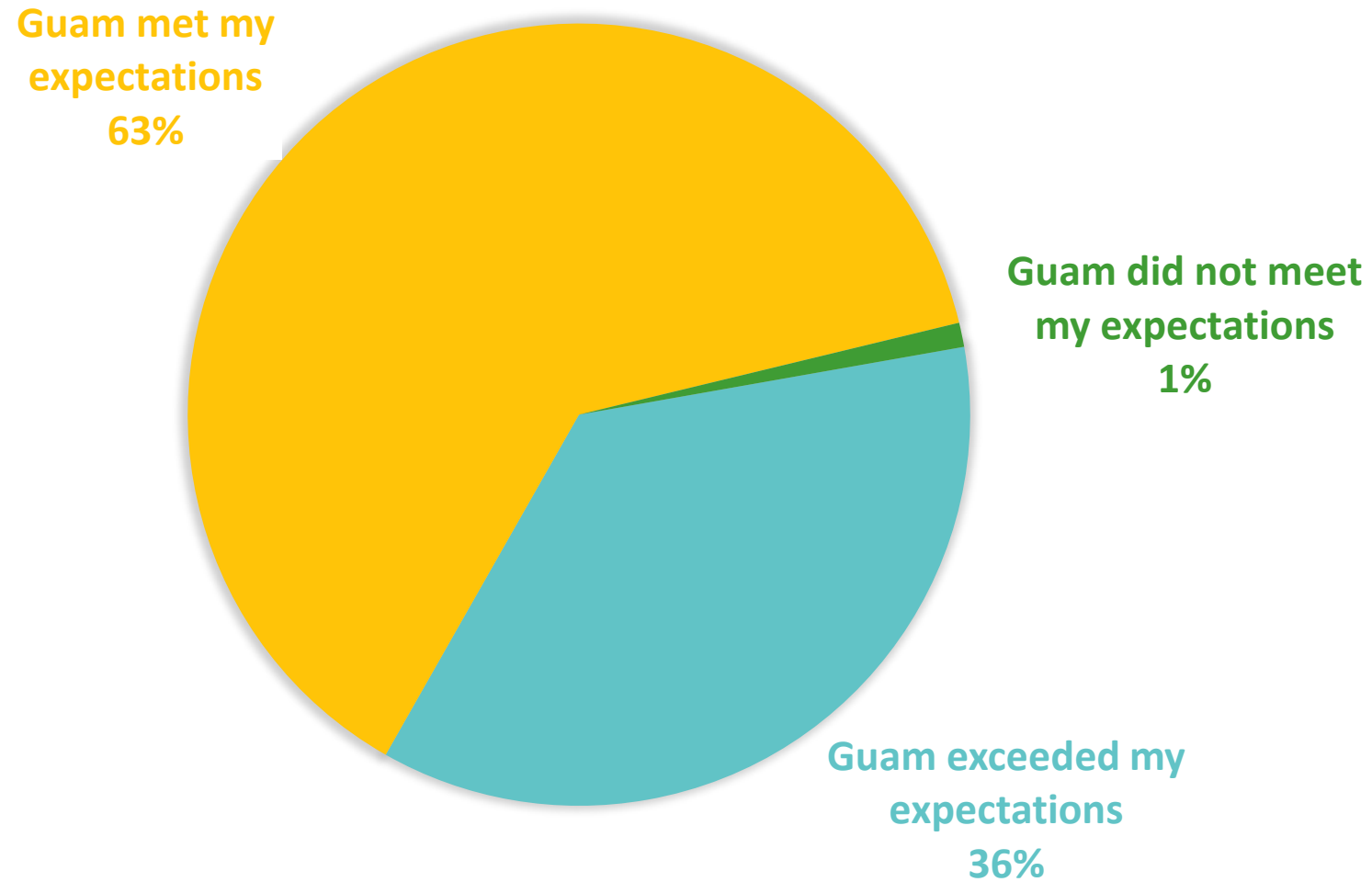
BRAND ADVOCACY



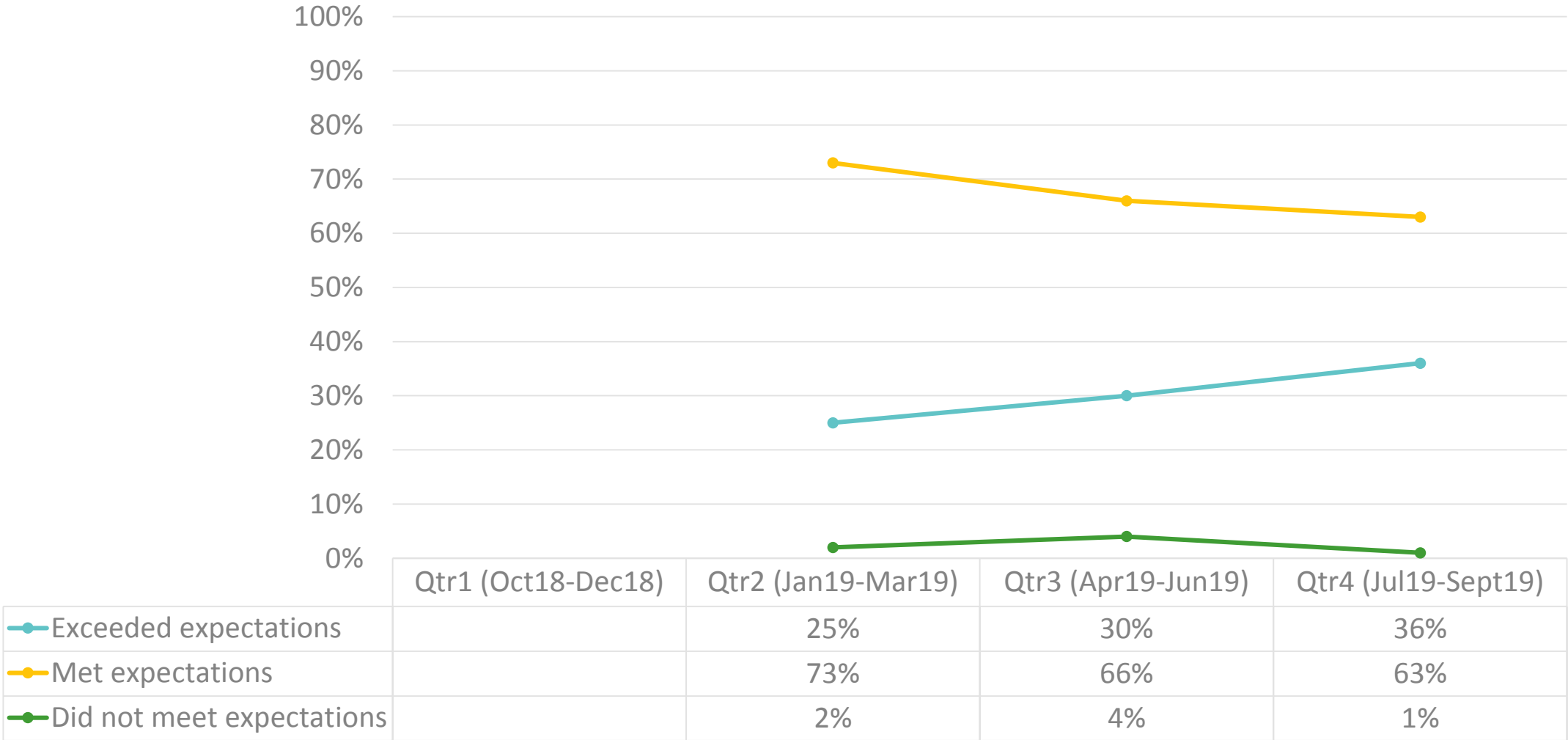
BRAND LOYALTY



TRIP EXPECTATIONS



TRIP EXPECTATIONS – TRACKING



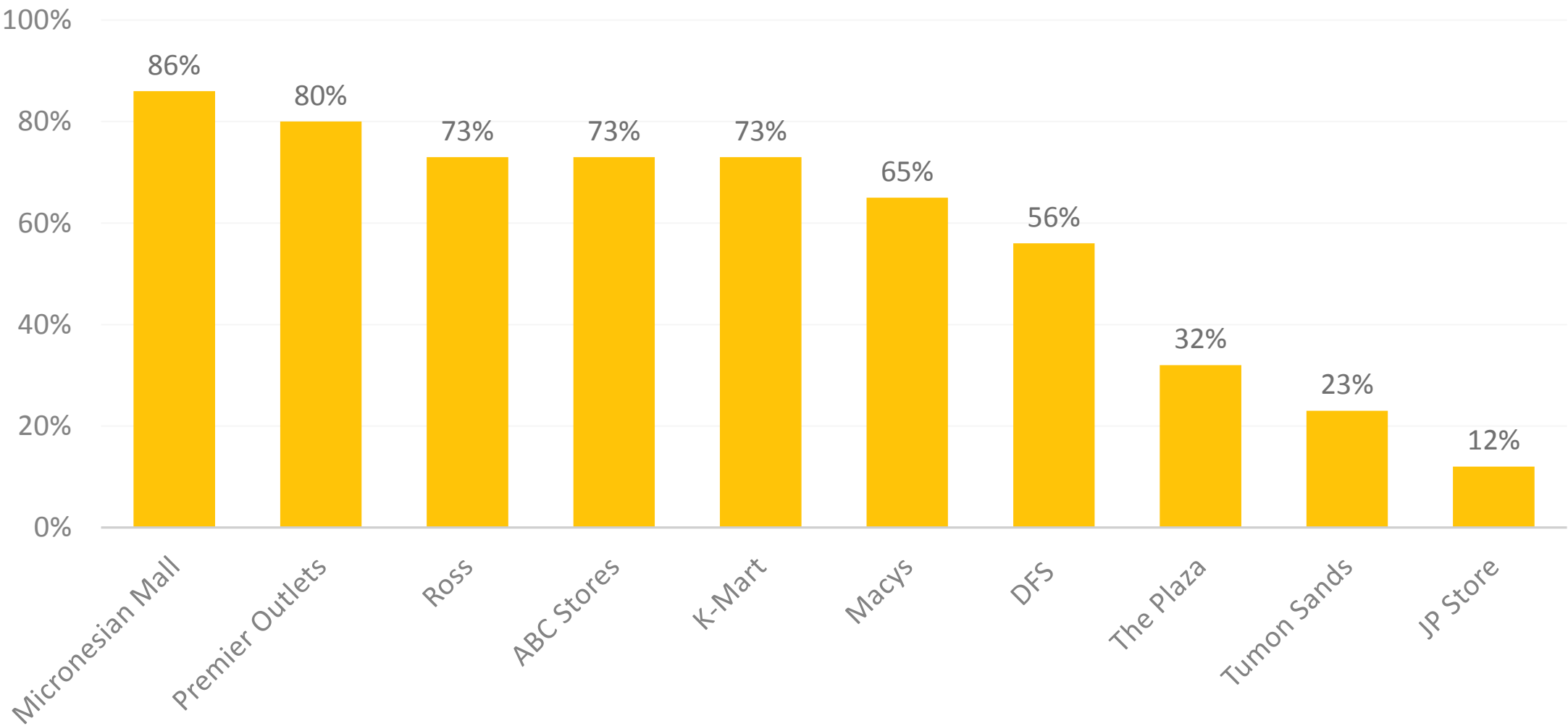


SECTION 5

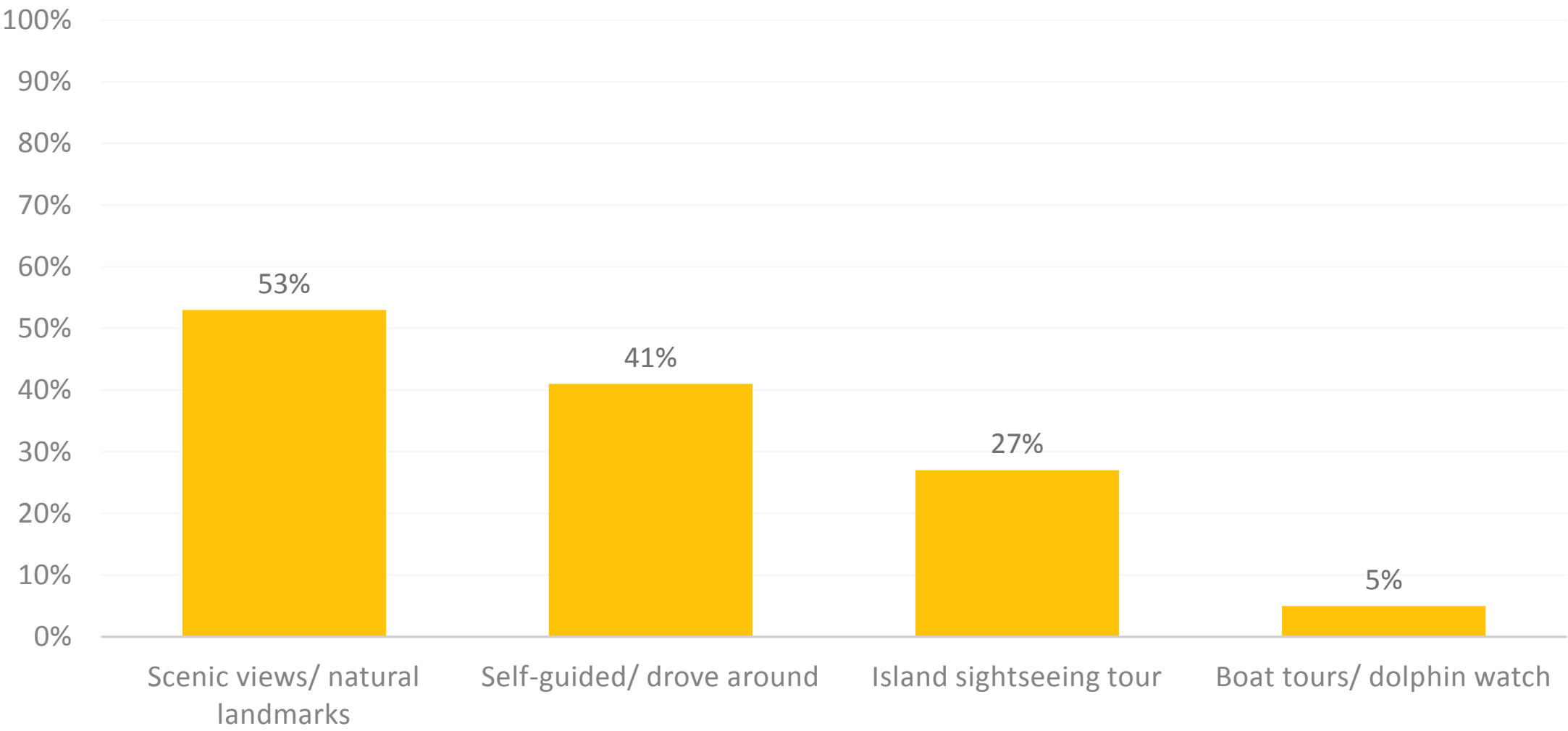
VISITOR ACTIVITIES



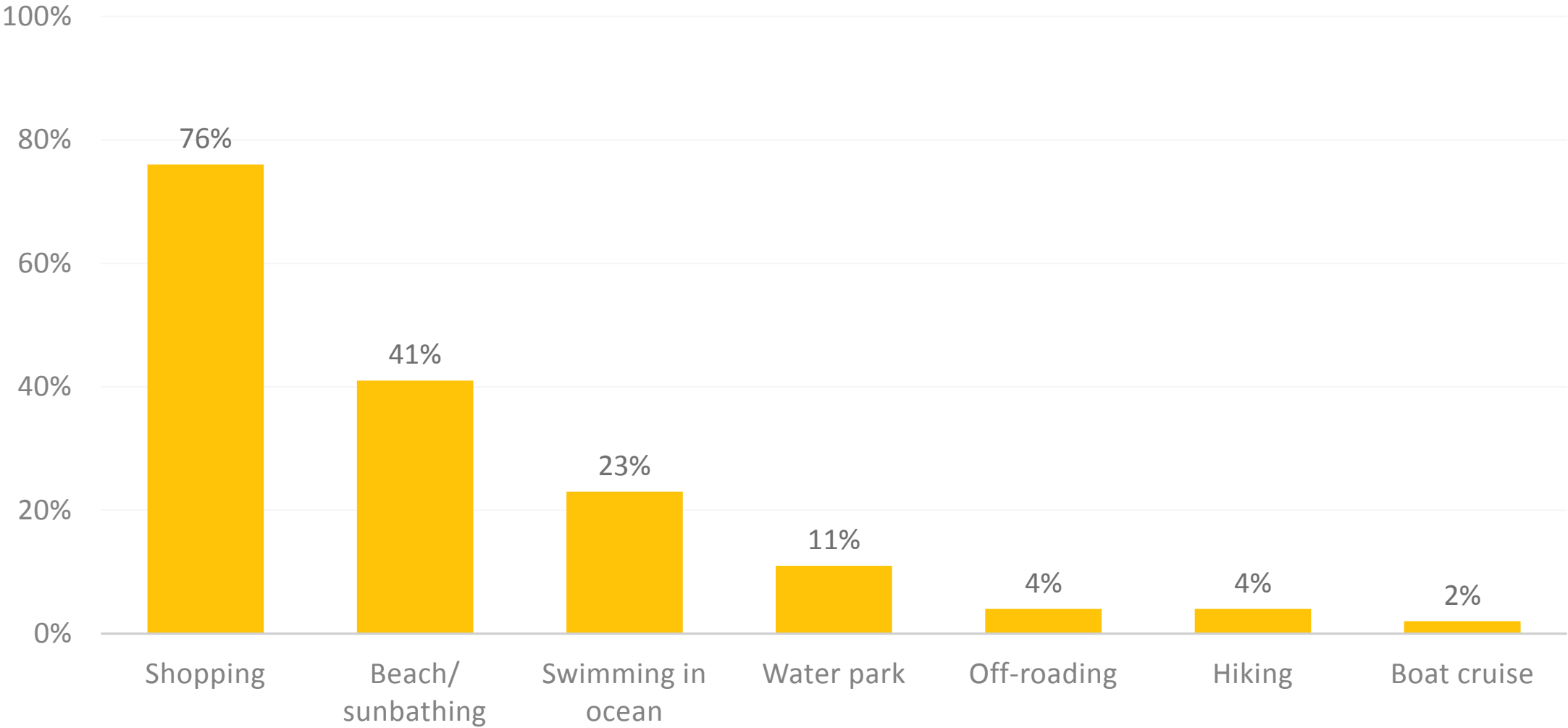
SHOPPING AREAS – PENETRATION



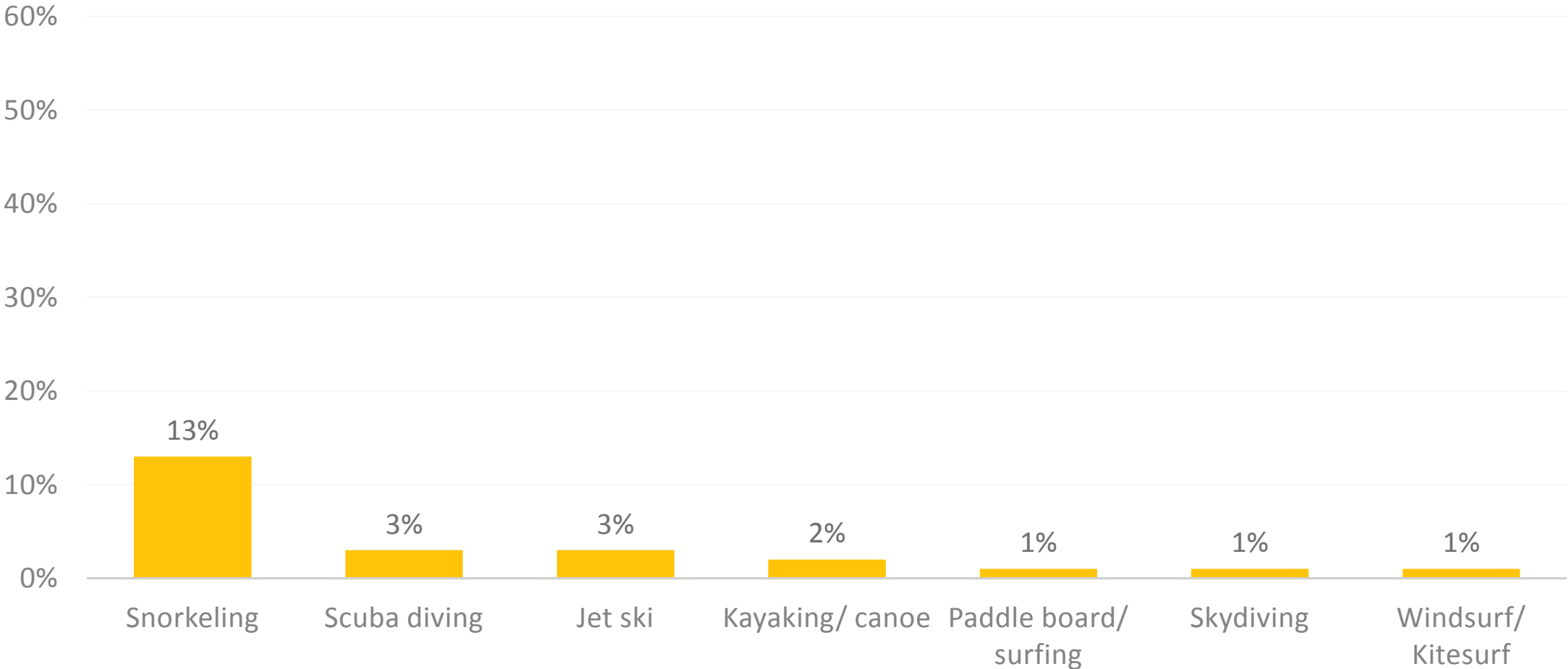
ACTIVITIES – SIGHTSEEING



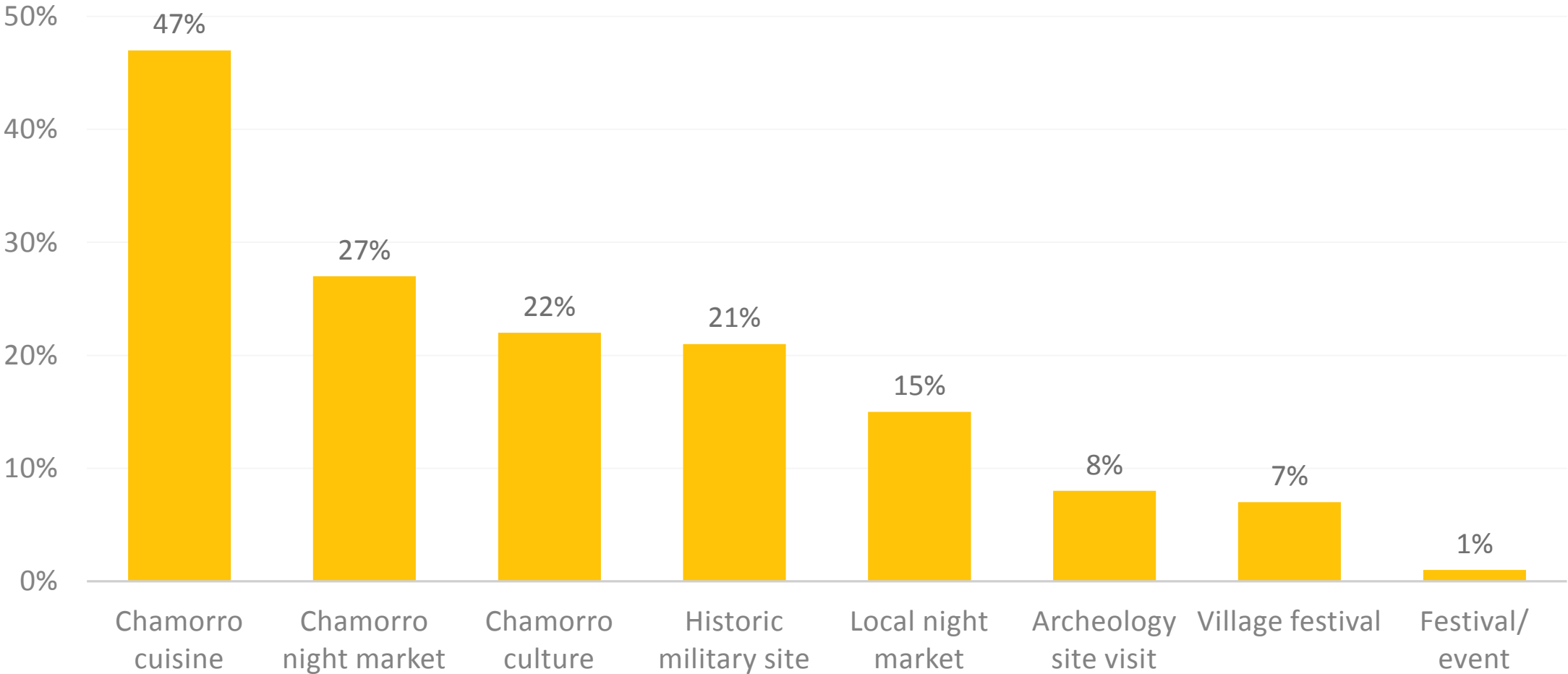
ACTIVITIES – RECREATION



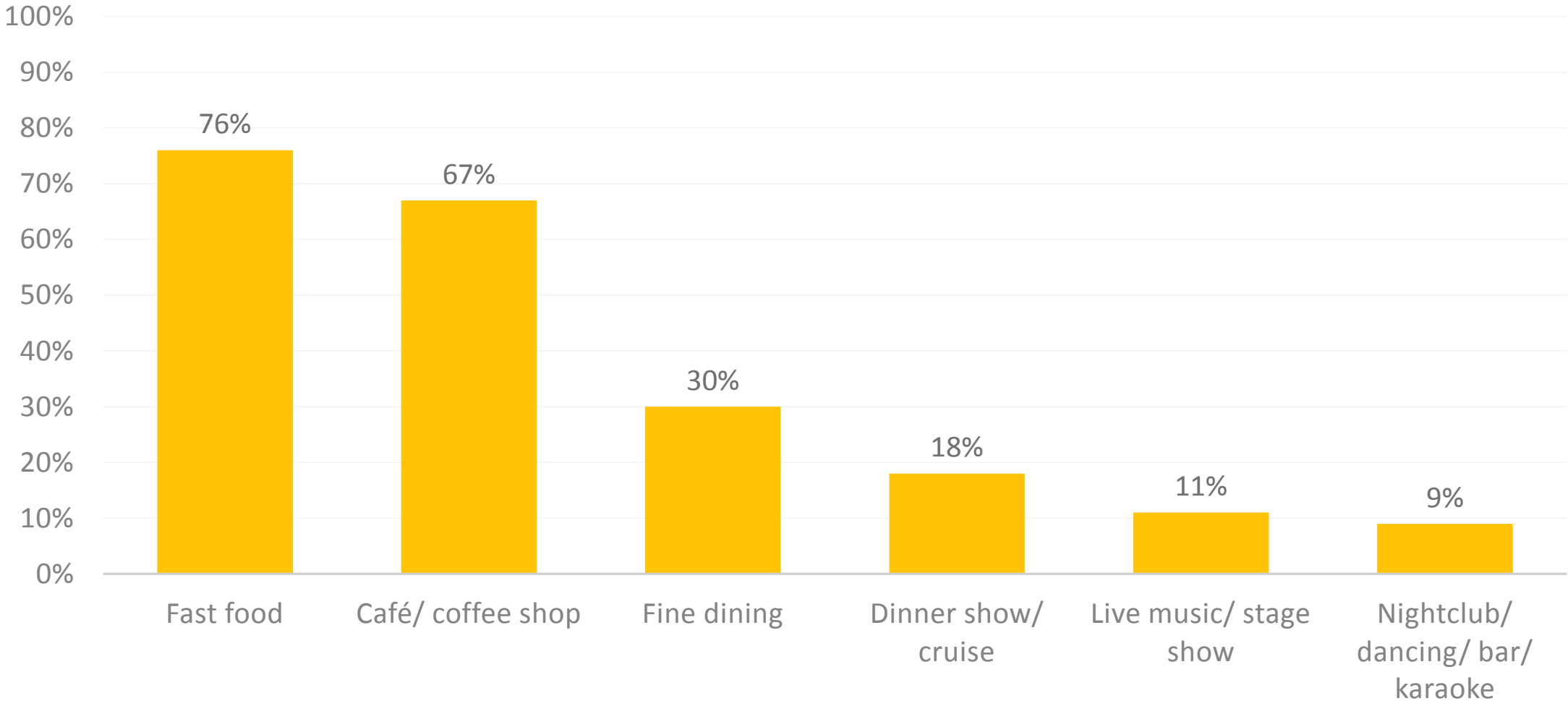
ACTIVITIES – SPORTS



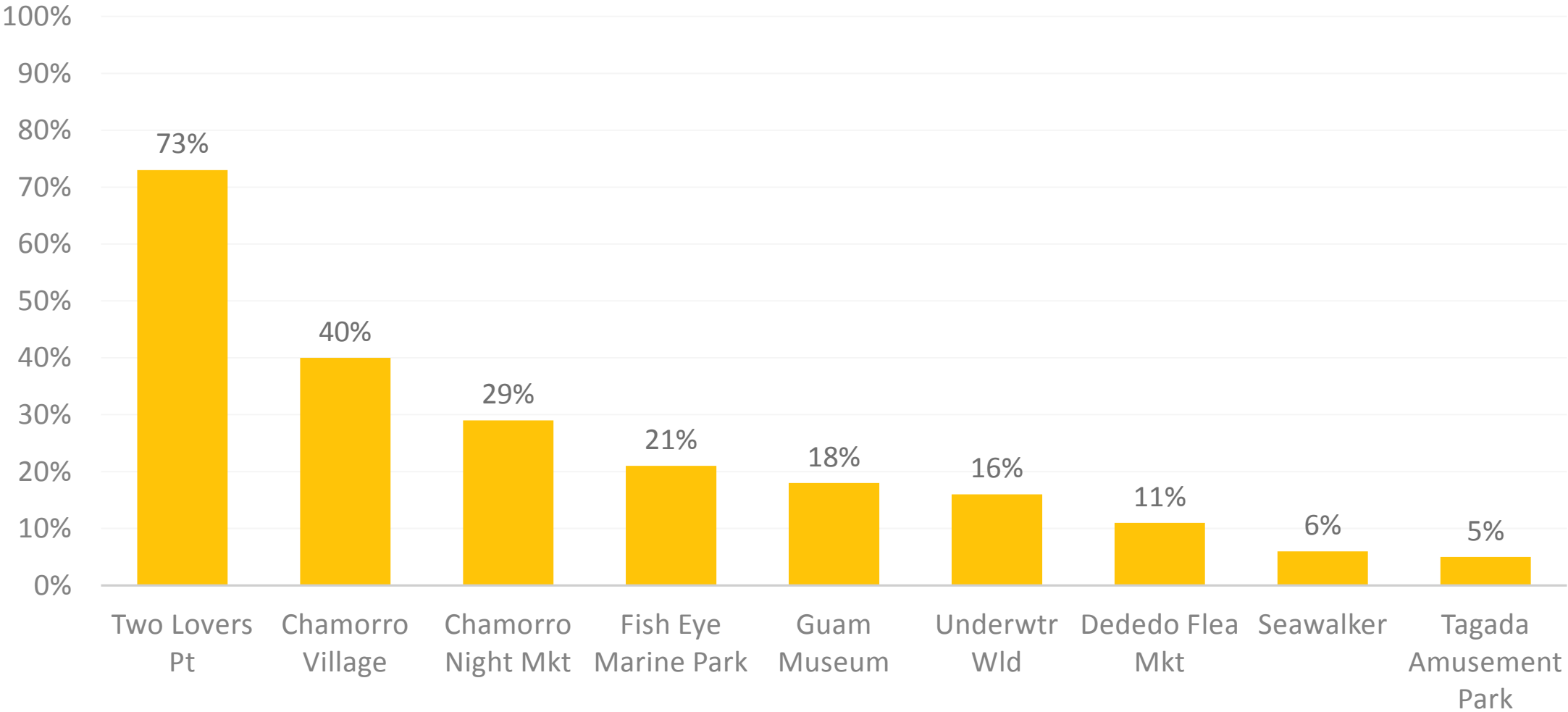
ACTIVITIES – HISTORY, CULTURE, ARTS



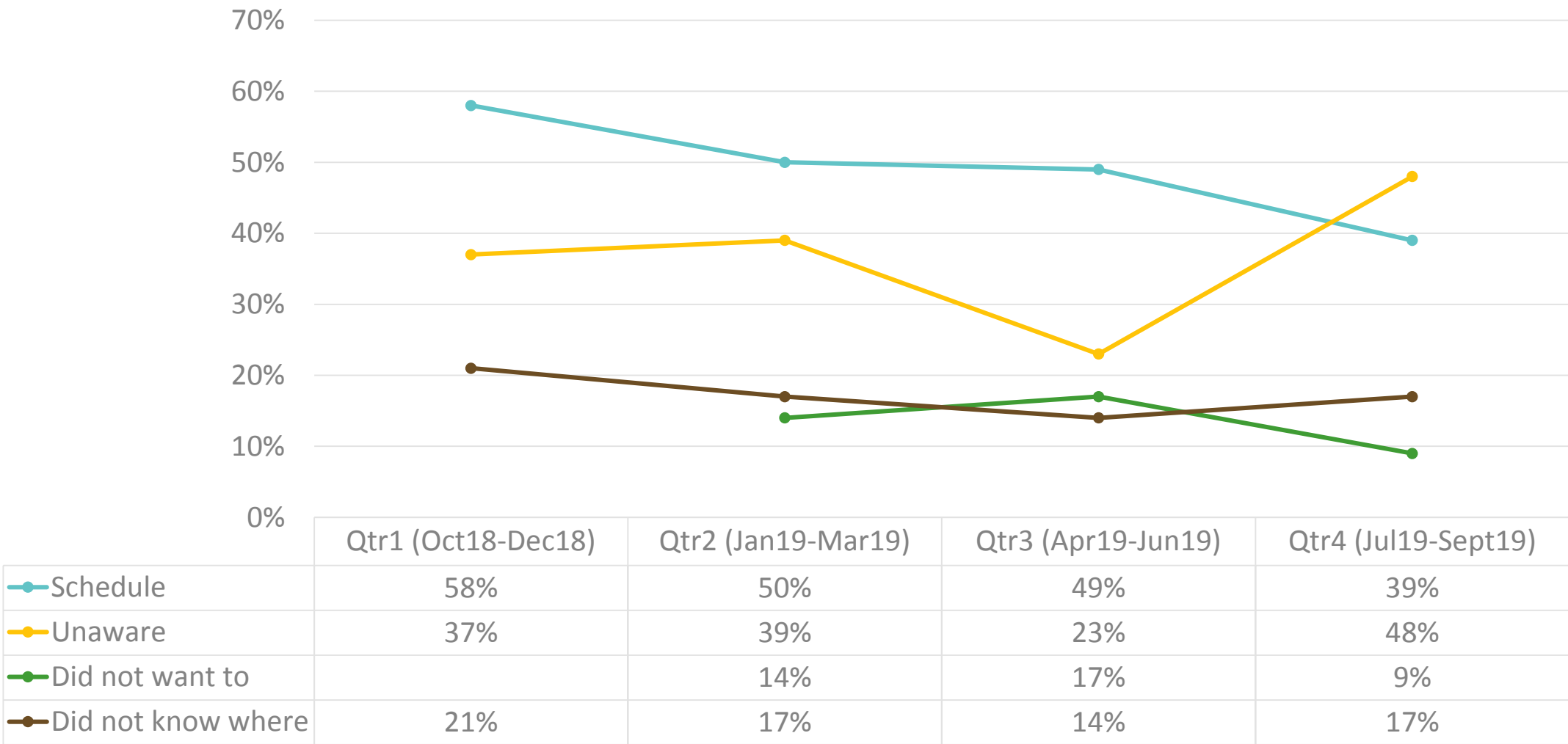
ACTIVITIES – ENTERTAINMENT & DINING



LOCAL ATTRACTIONS – TOP RESPONSES (5%+)



LOCAL CULTURE – OBSTACLES



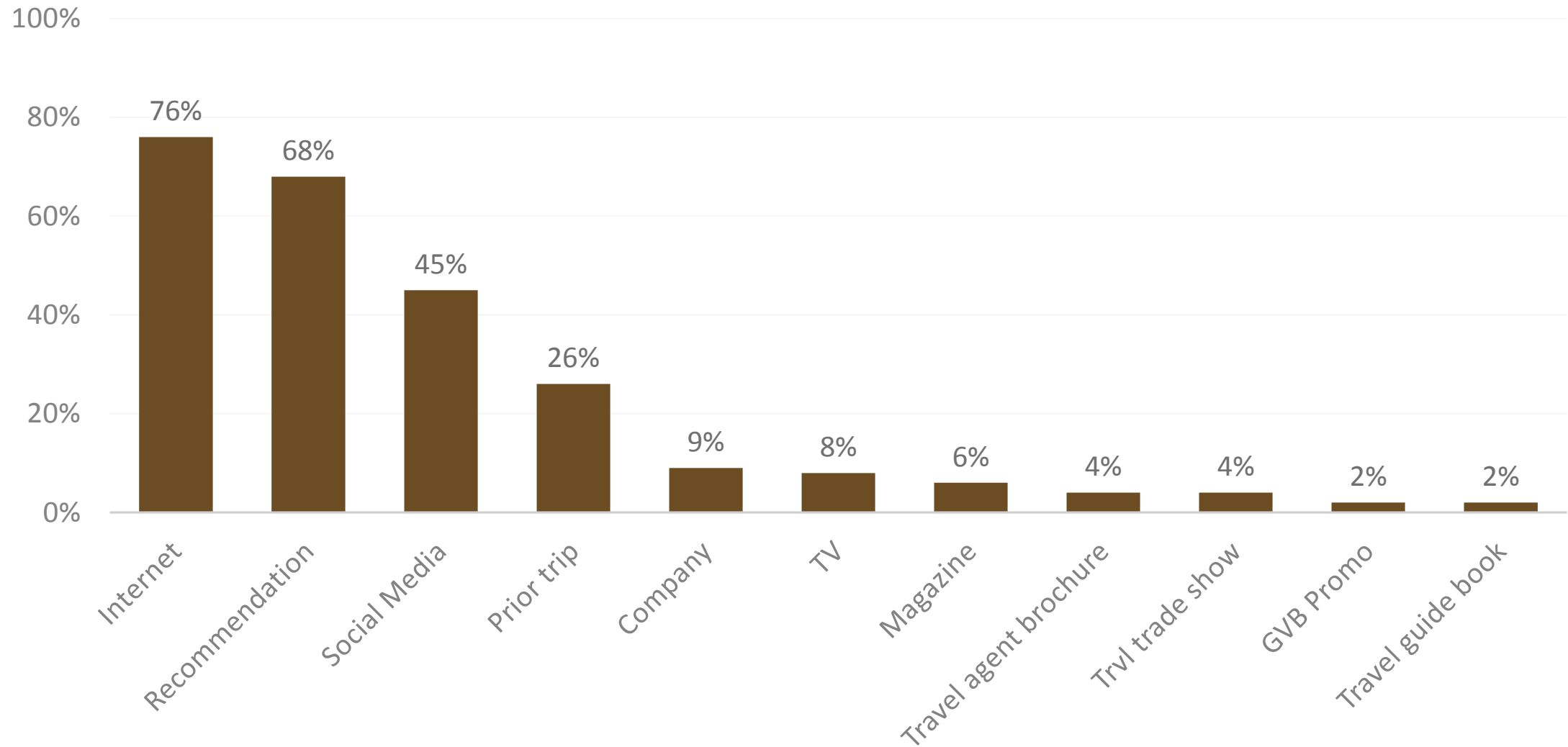
An aerial photograph of a rugged coastline with dark, mossy cliffs and turquoise water. White waves are crashing against the rocks. A thick, diagonal brushstroke in yellow and brown colors runs from the top left towards the bottom right, partially obscuring the image.

SECTION 6

SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION - SEGMENTATION

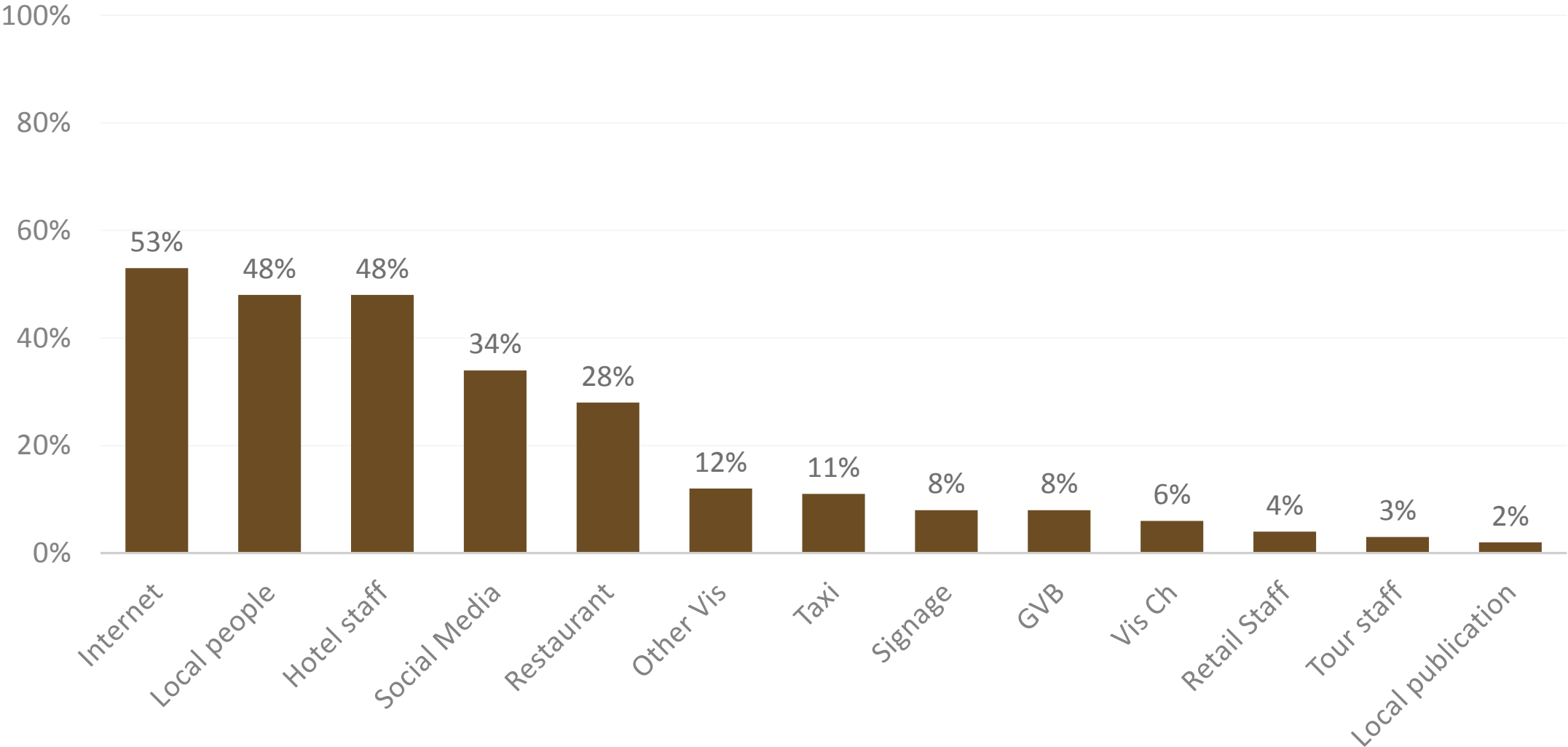
GVB VISITOR SATISFACTION STUDY

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

| | | TOTAL | FAMILY | FIT | MICE | LEISURE |
|----|---|-------|--------|-----|------|---------|
| | | - | - | - | - | - |
| Q5 | Internet/Mobile App | 76% | 75% | 76% | 100% | 76% |
| | Friend or relative | 68% | 70% | 68% | 67% | 69% |
| | Social media | 45% | 46% | 45% | 33% | 44% |
| | I have been to Guam before | 26% | 34% | 26% | 33% | 27% |
| | Co-worker/ company travel department | 9% | 5% | 9% | | 10% |
| | TV | 8% | 7% | 8% | | 7% |
| | Magazine (consumer) | 6% | 4% | 6% | | 7% |
| | Travel agent brochure | 4% | 4% | 4% | | 4% |
| | Travel trade shows | 4% | 4% | 4% | | 4% |
| | Travel guide book at bookstores | 2% | | 2% | | 2% |
| | Guam Visitors Bureau promotional activities | 2% | 2% | 2% | | 2% |
| | Consumer travel shows | 2% | 2% | 2% | | 2% |
| | Newspaper | 1% | 2% | 1% | | 1% |
| | Guam Visitors Bureau office | 1% | 2% | 1% | | 1% |
| | Total | 102 | 56 | 102 | 3 | 89 |

Prepared by Anthology Research

ONISLE SOURCES OF INFORMATION



[A]



ONISLE SOURCES OF INFORMATION

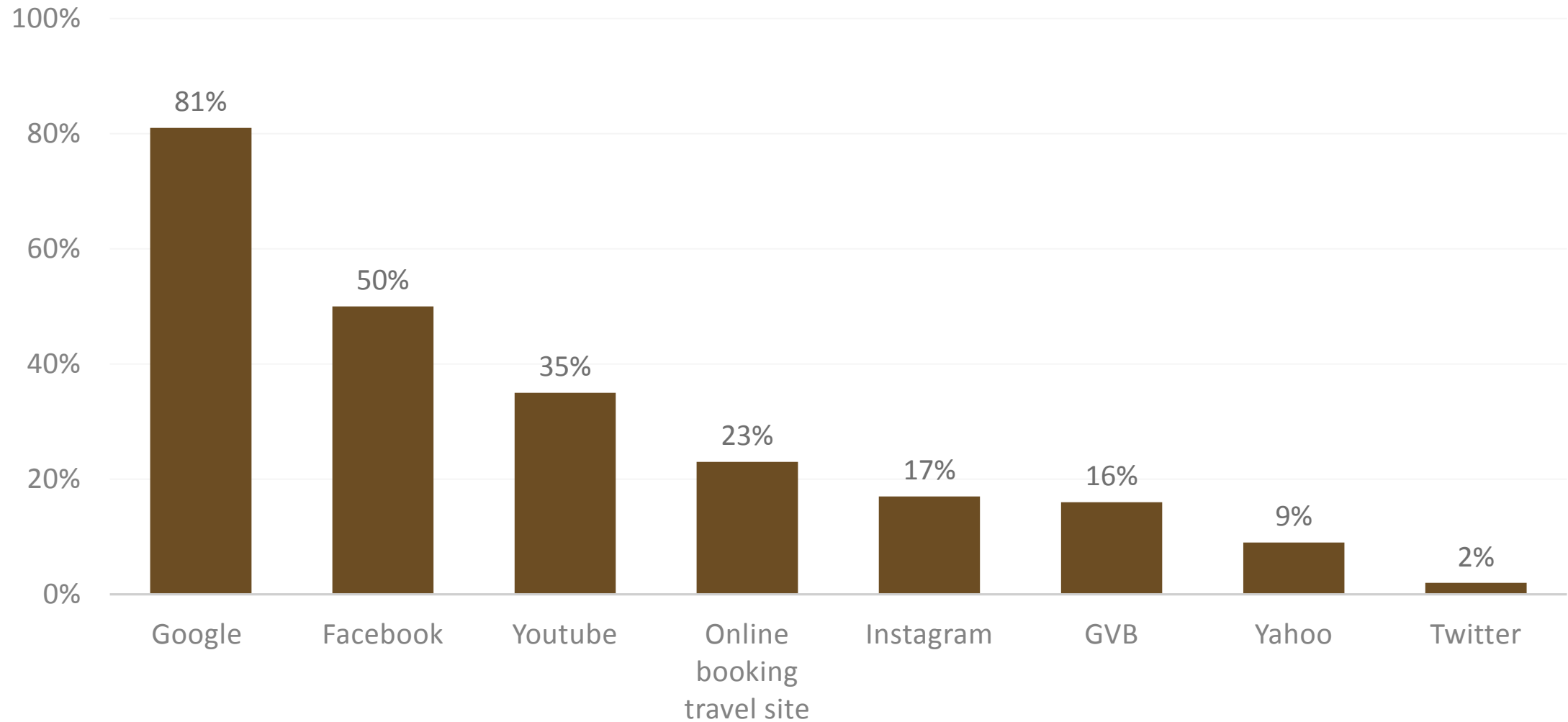
GVB VISITOR SATISFACTION STUDY

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

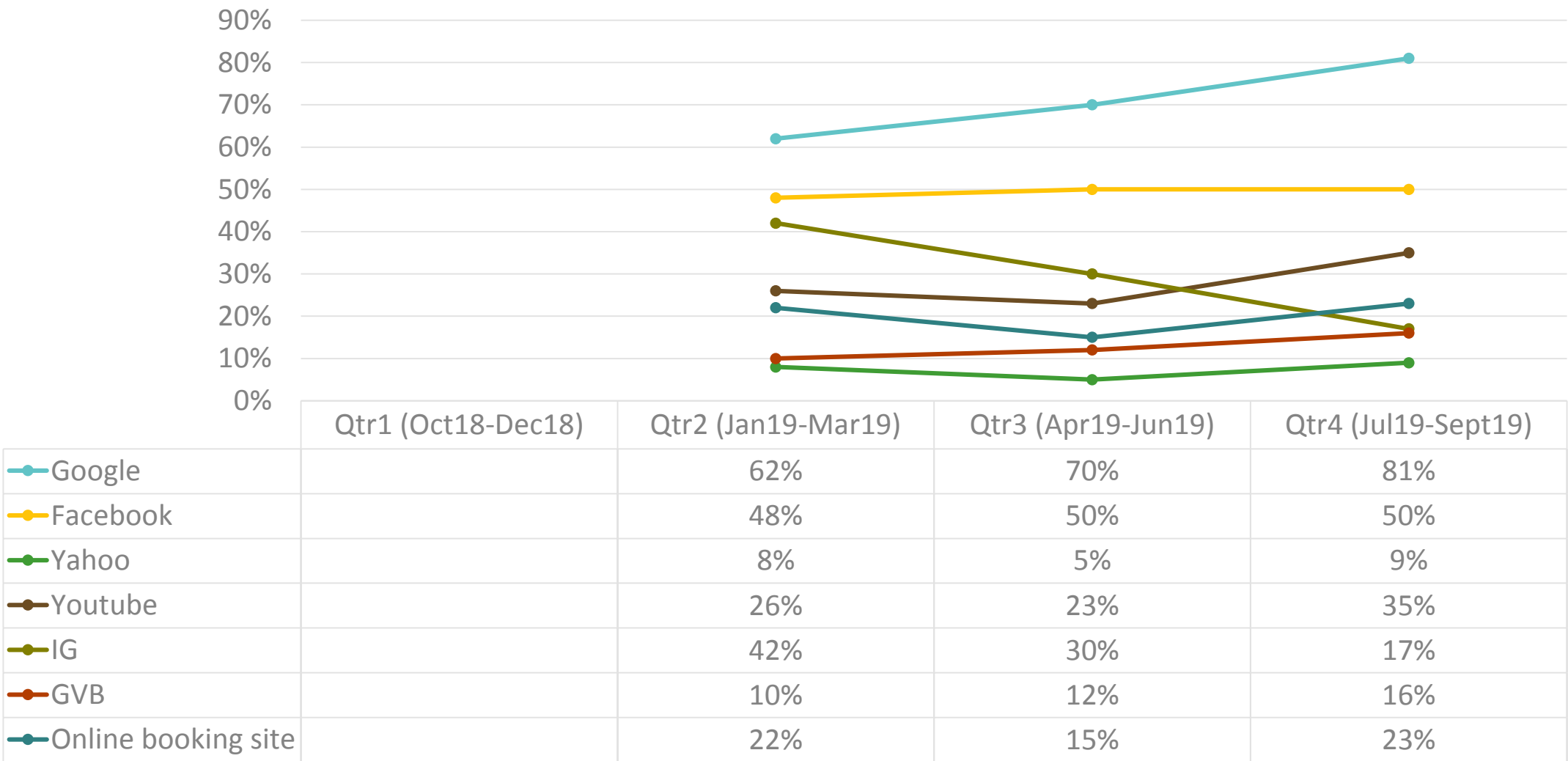
| | | TOTAL | FAMILY | FIT | MICE | LEISURE |
|----|----------------------------------|-------|--------|-----|------|---------|
| | | - | - | - | - | - |
| Q6 | Internet/ Mobile App | 53% | 52% | 53% | 100% | 56% |
| | Hotel staff | 48% | 50% | 48% | 33% | 51% |
| | Local people | 48% | 45% | 48% | 67% | 47% |
| | Social Media | 34% | 39% | 34% | 67% | 35% |
| | Restaurant staff (outside hotel) | 28% | 23% | 28% | 33% | 28% |
| | Other visitors | 12% | 9% | 12% | | 12% |
| | Taxi drivers | 11% | 14% | 11% | | 11% |
| | Signs/ advertisement | 8% | 7% | 8% | | 7% |
| | Guam Visitors Bureau | 8% | 9% | 8% | | 8% |
| | Visitors channel | 6% | 9% | 6% | | 6% |
| | Retail staff | 4% | 5% | 4% | | 3% |
| | Tour staff | 3% | 5% | 3% | | 2% |
| | Local publication | 2% | 2% | 2% | | 2% |
| | Guide books I brought with me | 1% | | 1% | | 1% |
| | Total | 102 | 56 | 102 | 3 | 89 |

Prepared by Anthology Research

ONLINE SOURCES OF INFORMATION



ONLINE SOURCES OF INFORMATION



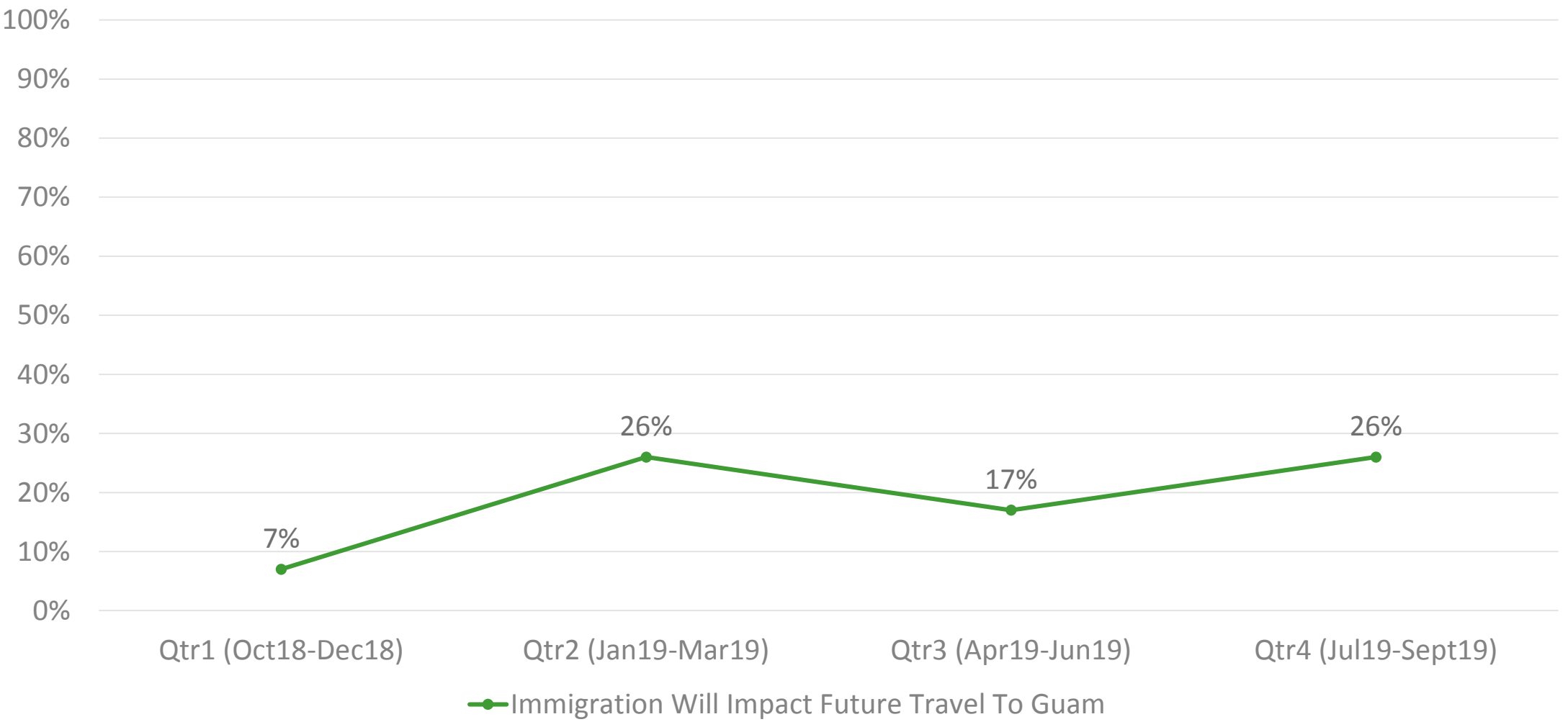


SECTION 7

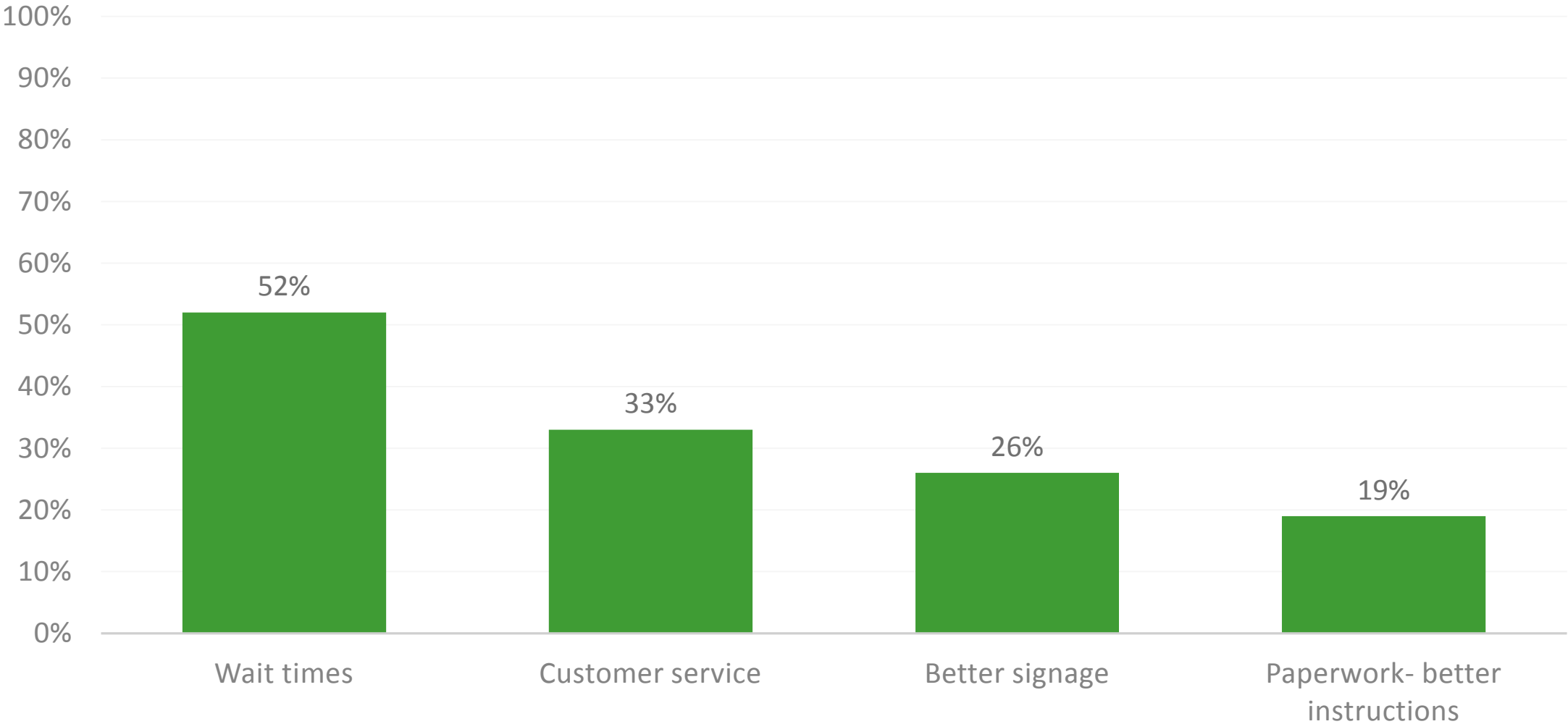
IMMIGRATION



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, 2-4 Qtr. 2019 | | | | |
|--|------------------|------------------|-------------------------|------------------|
| | 2nd Qtr. 2019 | 3rd Qtr. 2019 | 4th Qtr. 2019 | 2-4 Qtr. 2019 |
| Drivers: | rank | rank | rank | rank |
| Entertainment | | | 1 | 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% | 7.2% | 5.1% |
| 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 4th Quarter 2019 Period. It is:
 - **Entertainment**
- With this factor, the overall r^2 is .072 meaning that **7.2% of overall satisfaction is accounted for by this factor.**

DRIVERS – ONISLE EXPENDITURES

| Comparison of Drivers of Per Person On Island Expenditures, 2-4 Qtr. 2019 | | | | |
|---|------------------|------------------|-------------------------|------------------|
| | 2nd Qtr. 2019 | 3rd Qtr. 2019 | 4th Qtr. 2019 | 2-4 Qtr. 2019 |
| Drivers: | rank | rank | rank | rank |
| Entertainment | 1 | 1 | | 2 |
| Shopping | | | | |
| Dining | | | | |
| Beaches | | | 1 | 1 |
| Parks | | | | |
| Roads | | | | |
| Sightseeing Areas | | | | |
| Being a safe and secure destination | | | | |
| % of Overall Satisfaction Accounted For: | 10.3% | 10.2% | 16.8% | 6.9% |
| 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 4th Quarter 2019 Period. It is:
 - **Beaches**
- With this factor, the overall r^2 is .168 meaning that **16.8% of per person on island expenditure is accounted for by this factor.**