

# PHILIPPINES VISITOR PROFILE

OCTOBER - DECEMBER 2019

## VISITOR SATISFACTION



**74%**  
VERY  
SATISFIED



**9/10**  
AVERAGE

**54%**  
SHOPPING



**14%**  
NO LOCAL  
CULTURE



**76%**  
EXTREMELY LIKELY  
TO RECOMMEND



**68%**  
EXTREMELY LIKELY  
TO RETURN IN THE  
NEXT THREE YEARS

## SPENDING



**\$217.44**  
ON ISLAND  
PER PERSON  
PER DAY



**\$1,143.94**  
TOTAL SPENDING  
PER PERSON  
(PREPAID + ON ISLAND)

## MOST POPULAR



### Recreation

**75%** Shopping

### Entertainment & Dining

**70%** Fast Food

### Local Attractions

**60%** Two Lovers Point

### Sightseeing

**48%** Self-Guided/Drove Around

### History, Culture & Arts

**38%** Chamorro Cuisine

### Sports

**5%** Snorkeling

# PHILIPPINES VISITOR PROFILE

OCTOBER - DECEMBER 2019

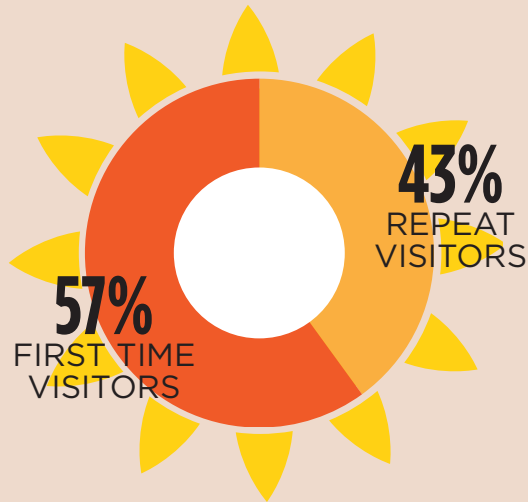
## TRAVELER PROFILE



**40.08**  
AVERAGE AGE

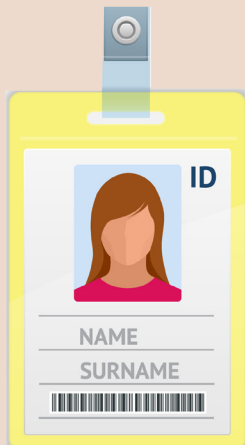


**3.0**  
AVERAGE  
PARTY SIZE



**4.86**  
NIGHTS  
AVERAGE  
LENGTH  
OF STAY

## OCCUPATION



**25%** COMPANY, MANAGER

**25%** SELF-EMPLOYED

**12%** PROF/SPECIALIST

**10%** COMPANY, NON-MANAGER

## TRAVEL MOTIVATIONS



Motivation	Percentage
Vacation	62%
Shopping	52%
Visit Friend/Relative	25%
Positive Prior Experience	25%

## TRIP PLANNING



MADE TRAVEL ARRANGEMENTS ONLINE



**25%**  
USED A  
TRAVEL  
WEBSITE



**6%**  
USED A  
TRAVEL AGENT



**70%**  
BOOKED DIRECT  
WITH AIRLINE  
AND/OR HOTEL





# *Guam Visitors Bureau*

## **Philippine Visitor Tracker Exit Profile & Market Segmentation Report**

FY2020 – QTR.1 (OCT-DEC 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.

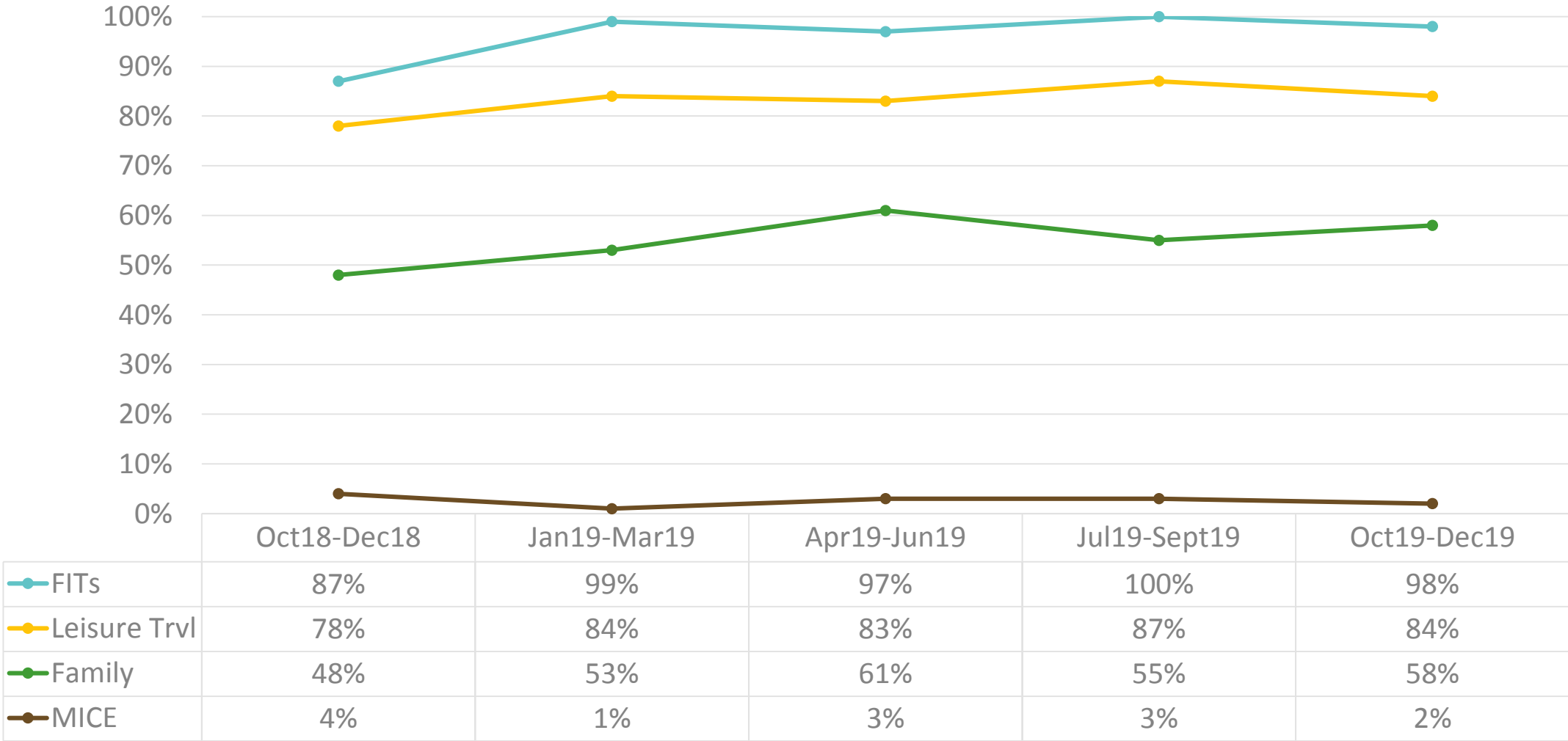
# Objectives

- 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







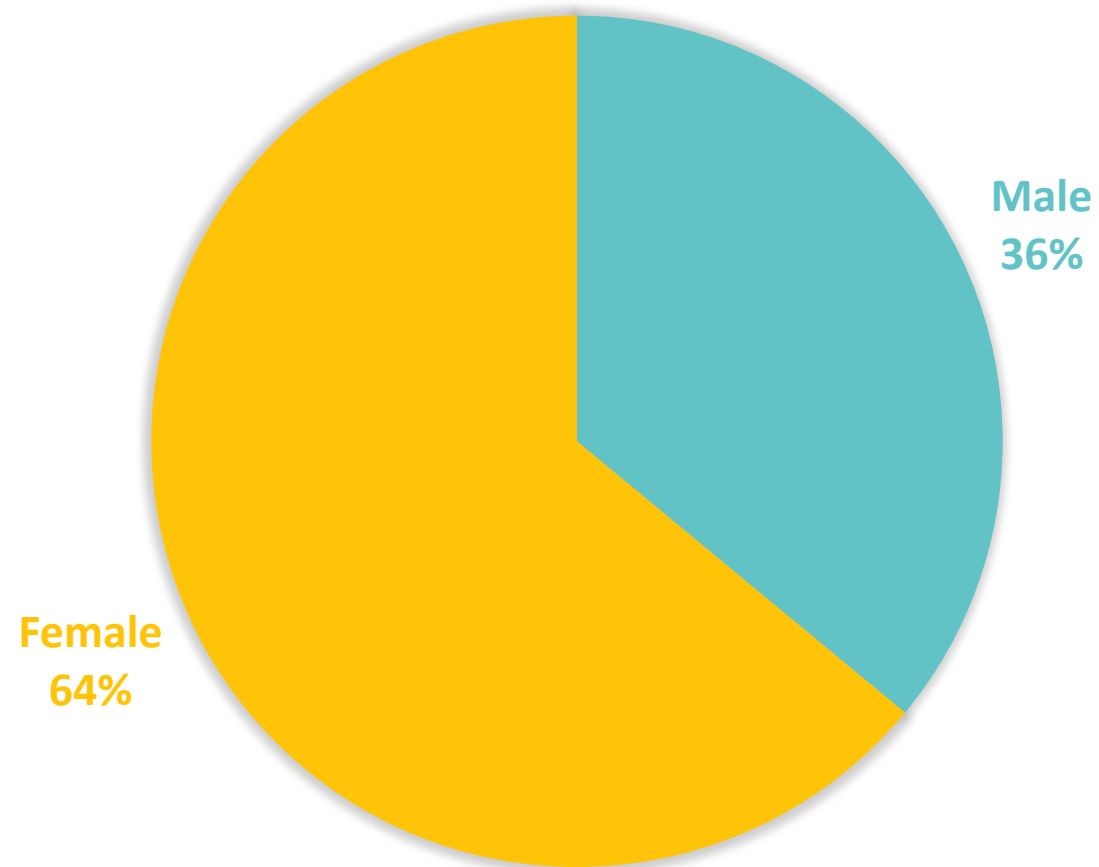
SECTION 1

# PROFILE OF RESPONDENTS





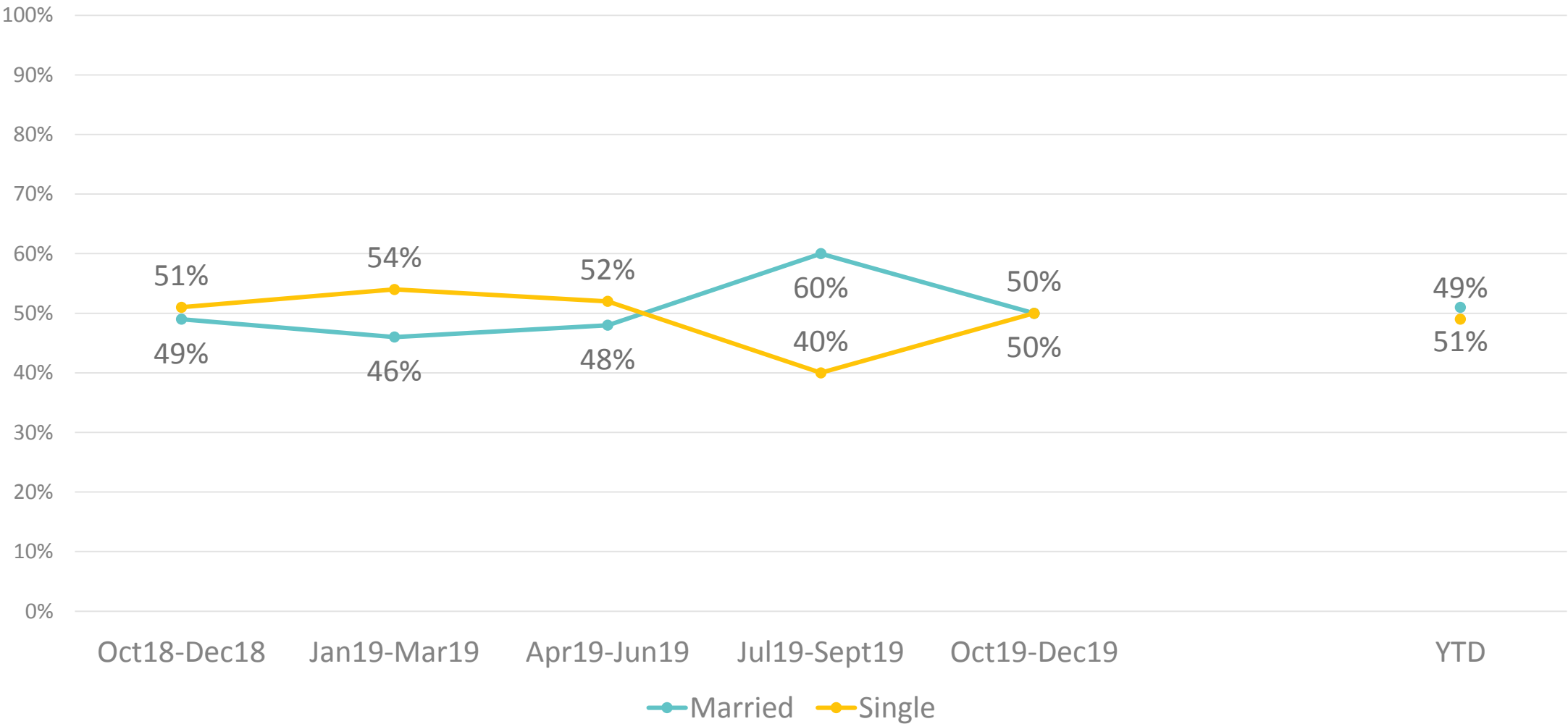
# GENDER



# MARITAL STATUS



# MARITAL STATUS – TRACKING





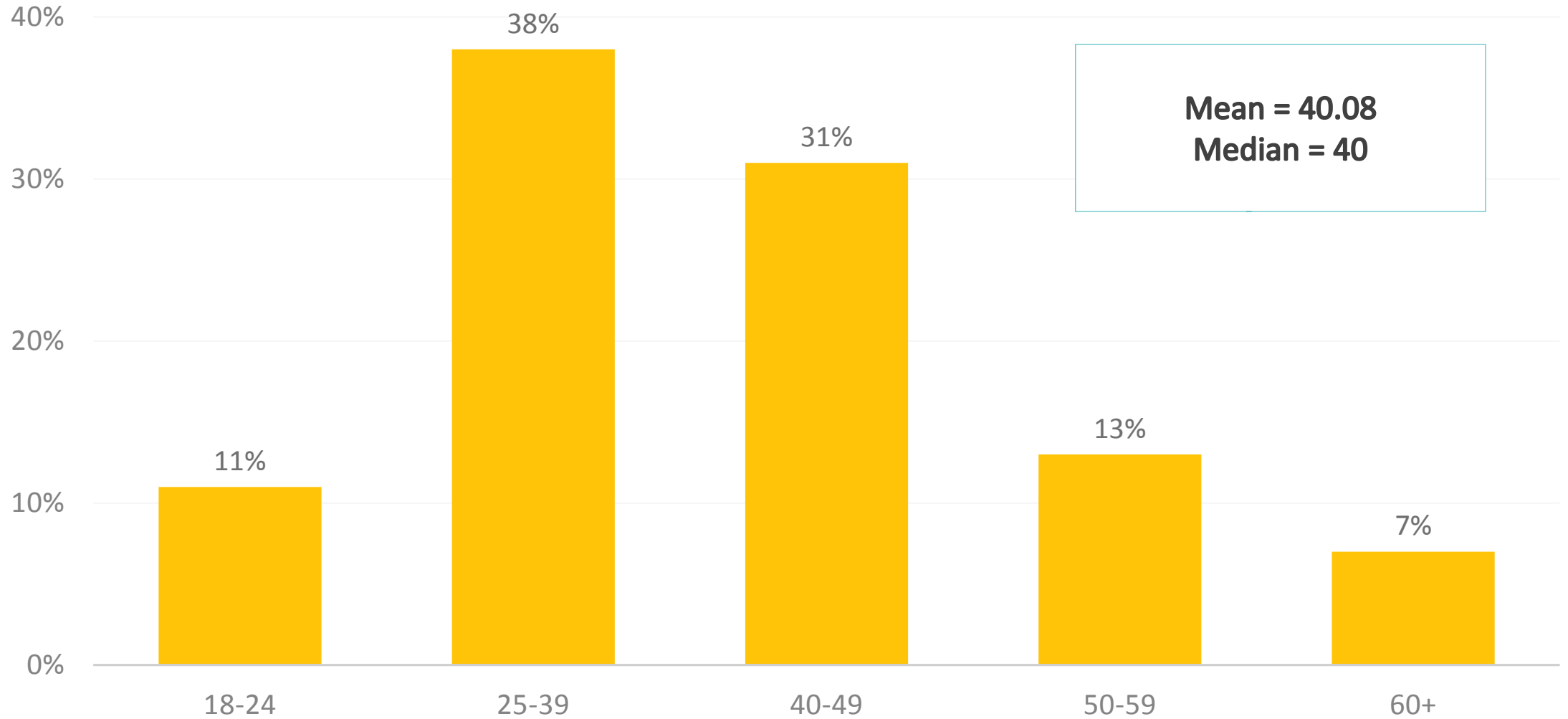
# MARITAL STATUS – SEGMENTATION

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

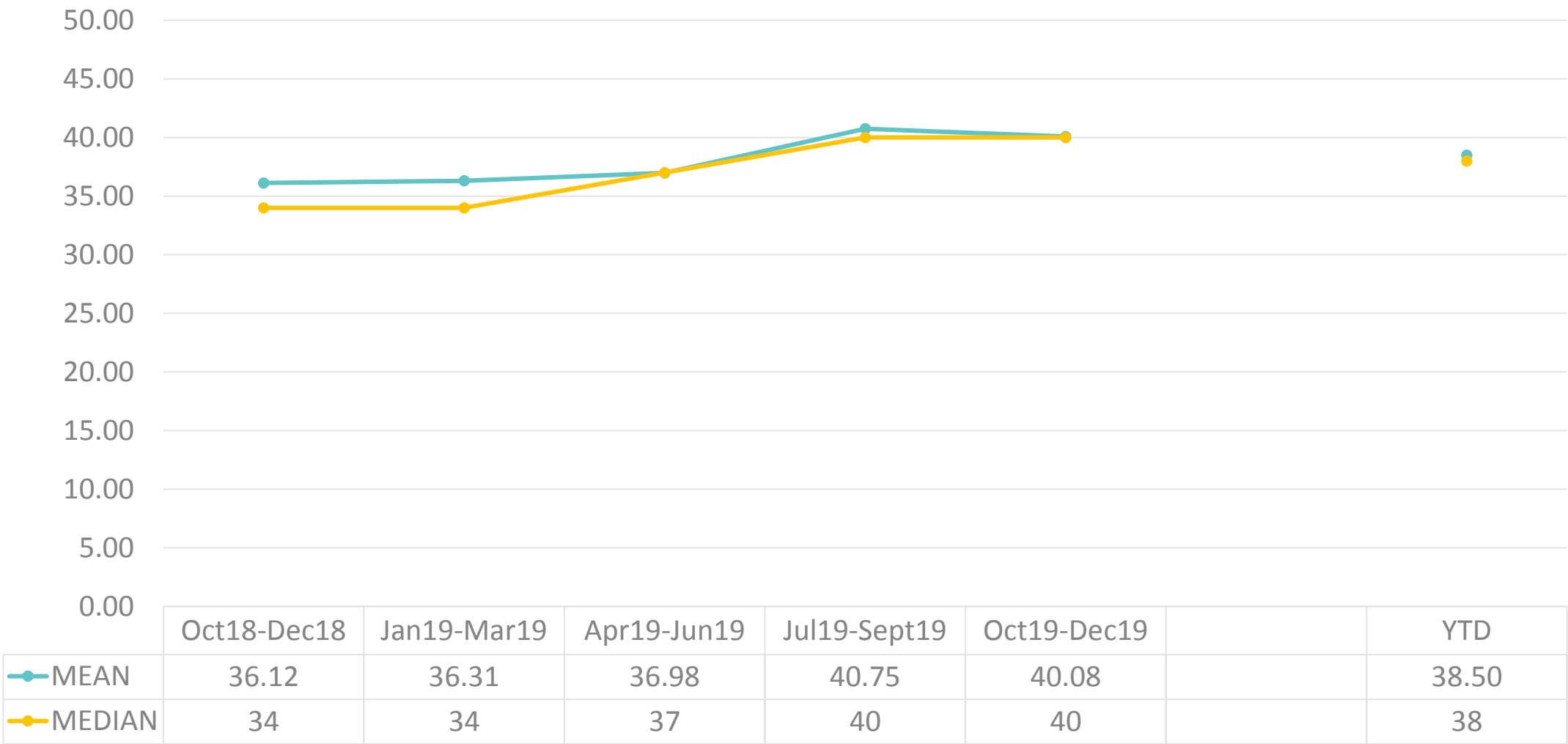
		TOTAL	FAMILY	FIT	MICE	LEISURE
		-	-	-	-	-
QE	Married	50%	59%	50%	50%	52%
	Single	50%	41%	50%	50%	48%
	Total	102	59	100	2	86

\*Prepared by Anthology Research\*

# AGE



# AGE – TRACKING





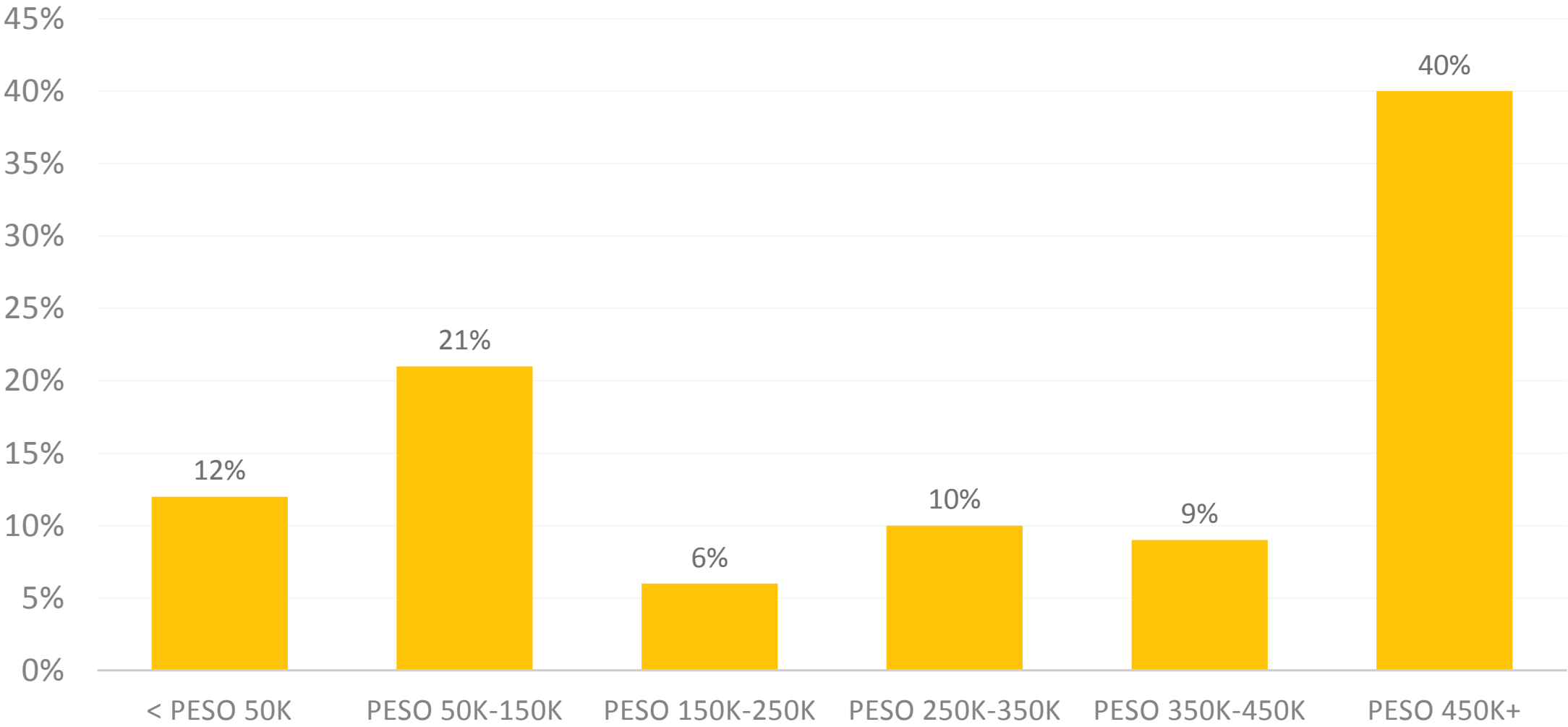
# AGE – SEGMENTATION

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

		TOTAL	FAMILY	FIT	MICE	LEISURE
		-	-	-	-	-
QF	18-24	11%	15%	11%	50%	7%
	25-39	38%	39%	38%		40%
	40-49	31%	29%	31%	50%	34%
	50-59	13%	15%	13%		13%
	60+	7%	2%	7%		7%
	Total	102	59	100	2	86
QF	Mean	40.08	38.42	40.04	34.50	40.88
	Median	40	38	40	35	40

\*Prepared by Anthology Research\*

# HOUSEHOLD INCOME



# HOUSEHOLD INCOME – SEGMENTATION

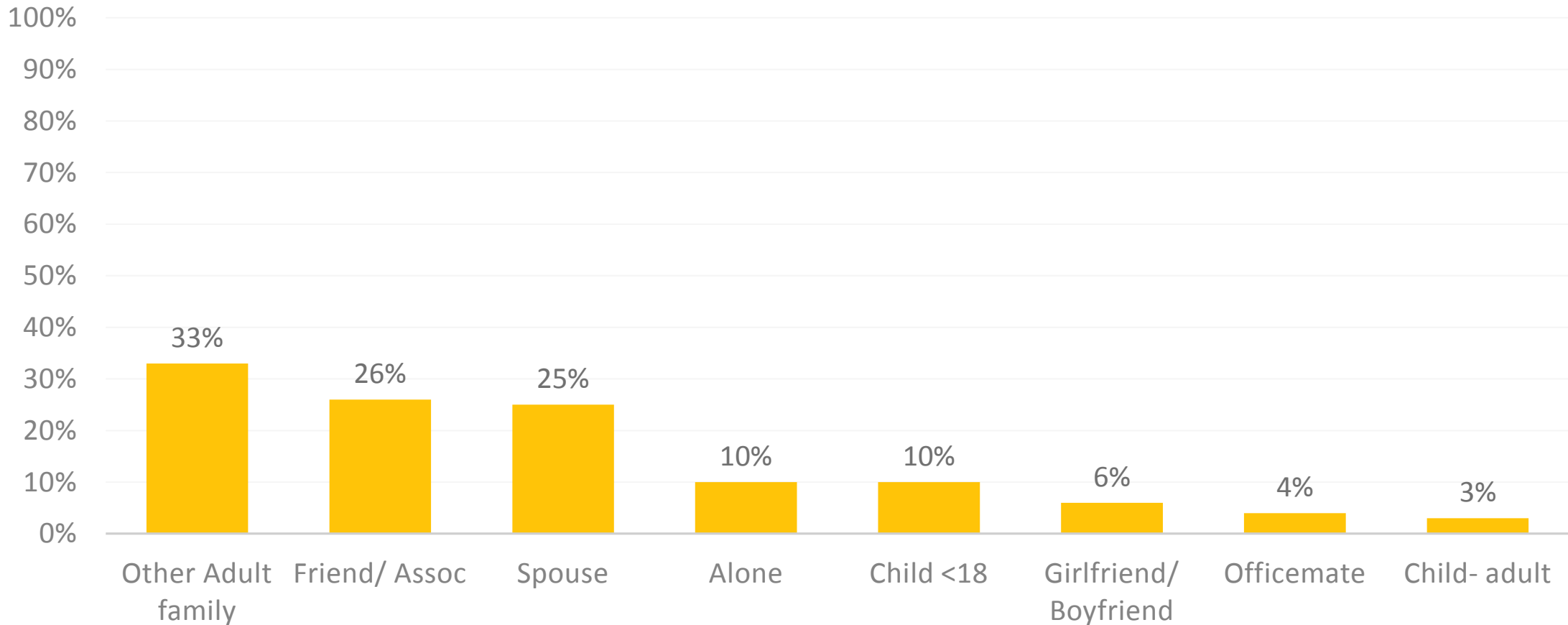
**GVB VISITOR SATISFACTION STUDY**  
**D2 What is your approximate annual household income, before taxes?**

		TOTAL	FAMILY	FIT	MICE	LEISURE
		-	-	-	-	-
D2	< PESO 50K	12%	12%	12%		7%
	PESO 50K-150K	21%	22%	20%		21%
	PESO 150K-250K	6%	8%	6%		6%
	PESO 250K-350K	10%	5%	10%		10%
	PESO 350K-450K	9%	8%	8%		9%
	PESO 450K+	40%	39%	41%	50%	43%
	No income	3%	5%	3%	50%	3%
	Total	102	59	100	2	86

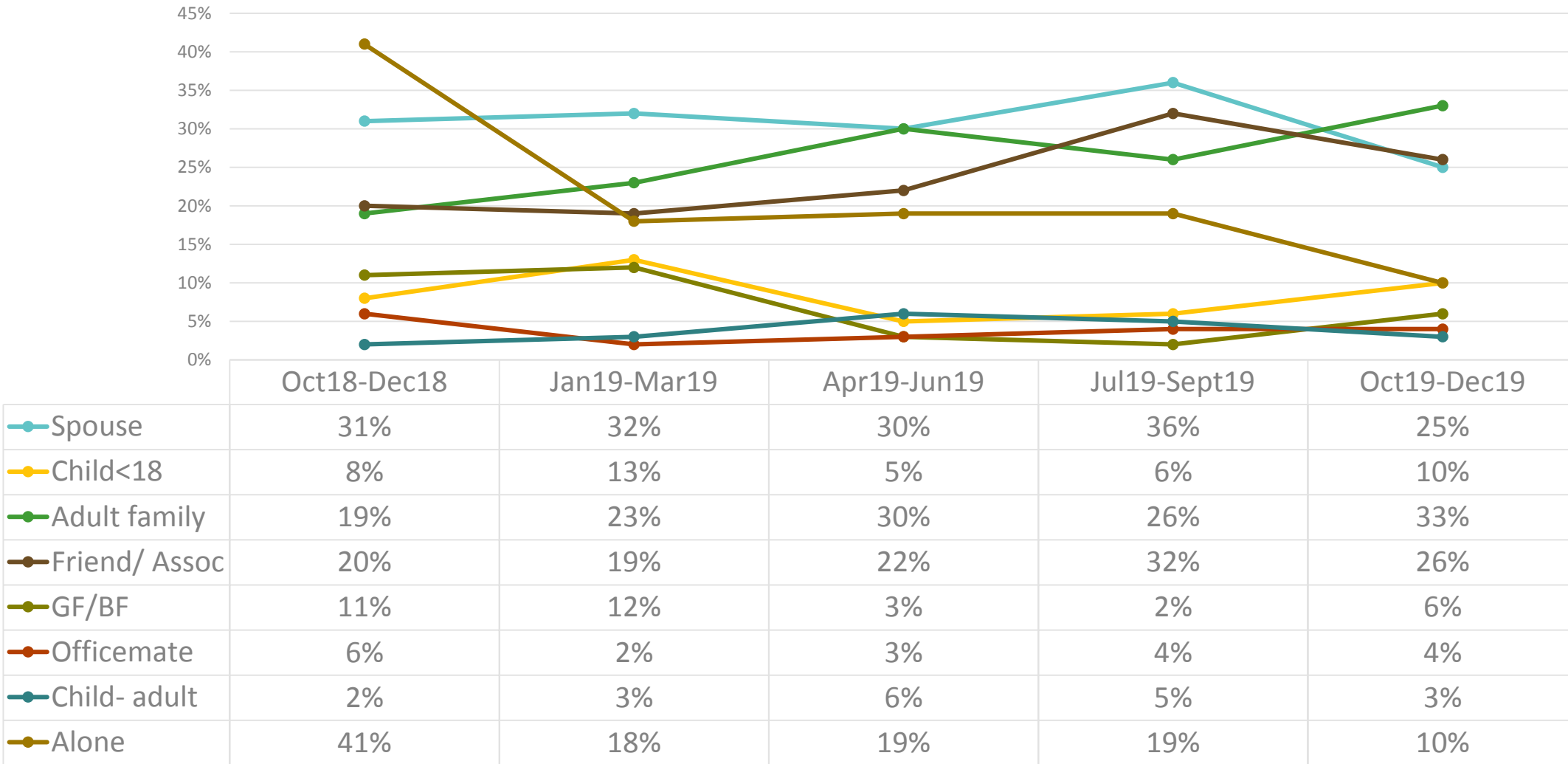
\*Prepared by Anthology Research\*



# TRAVEL PARTY



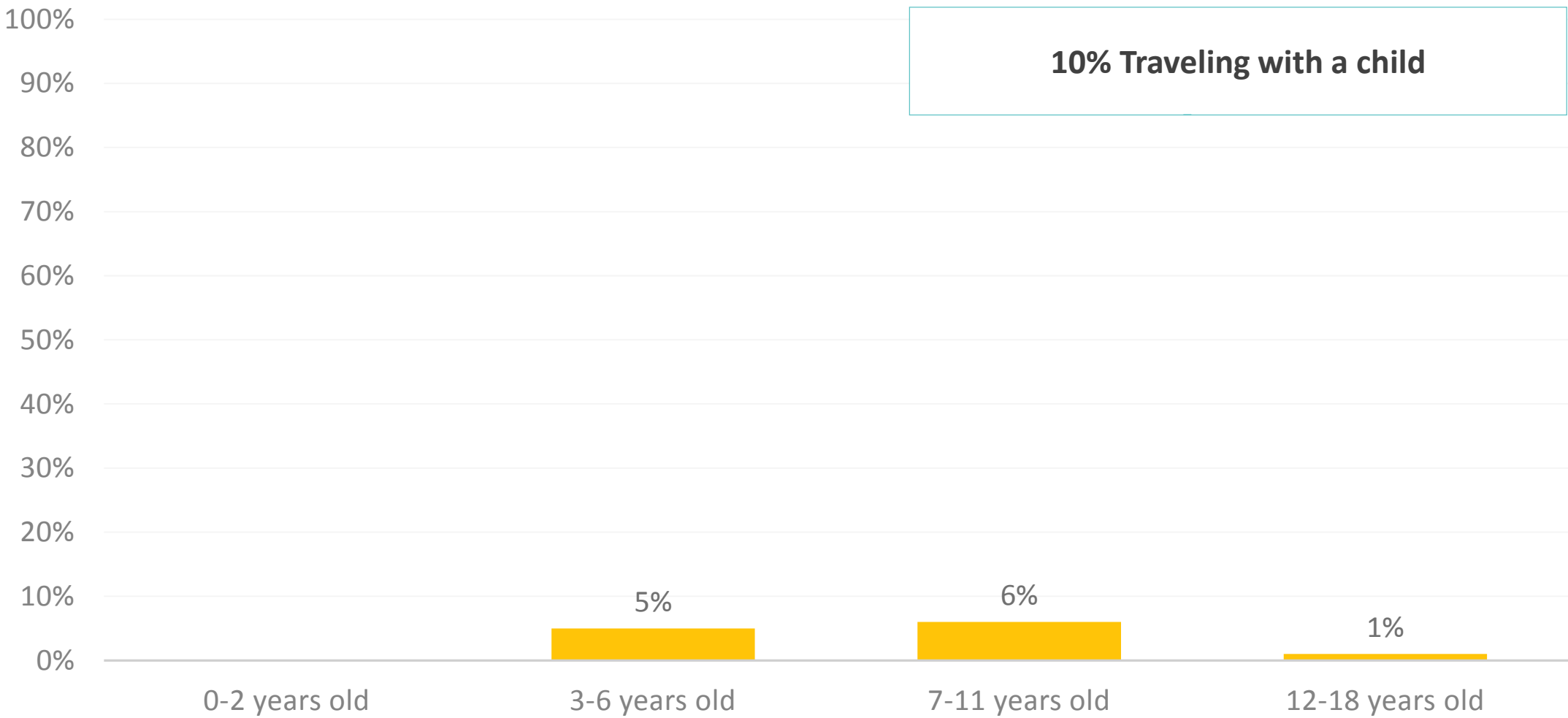
# TRAVEL PARTY – TRACKING



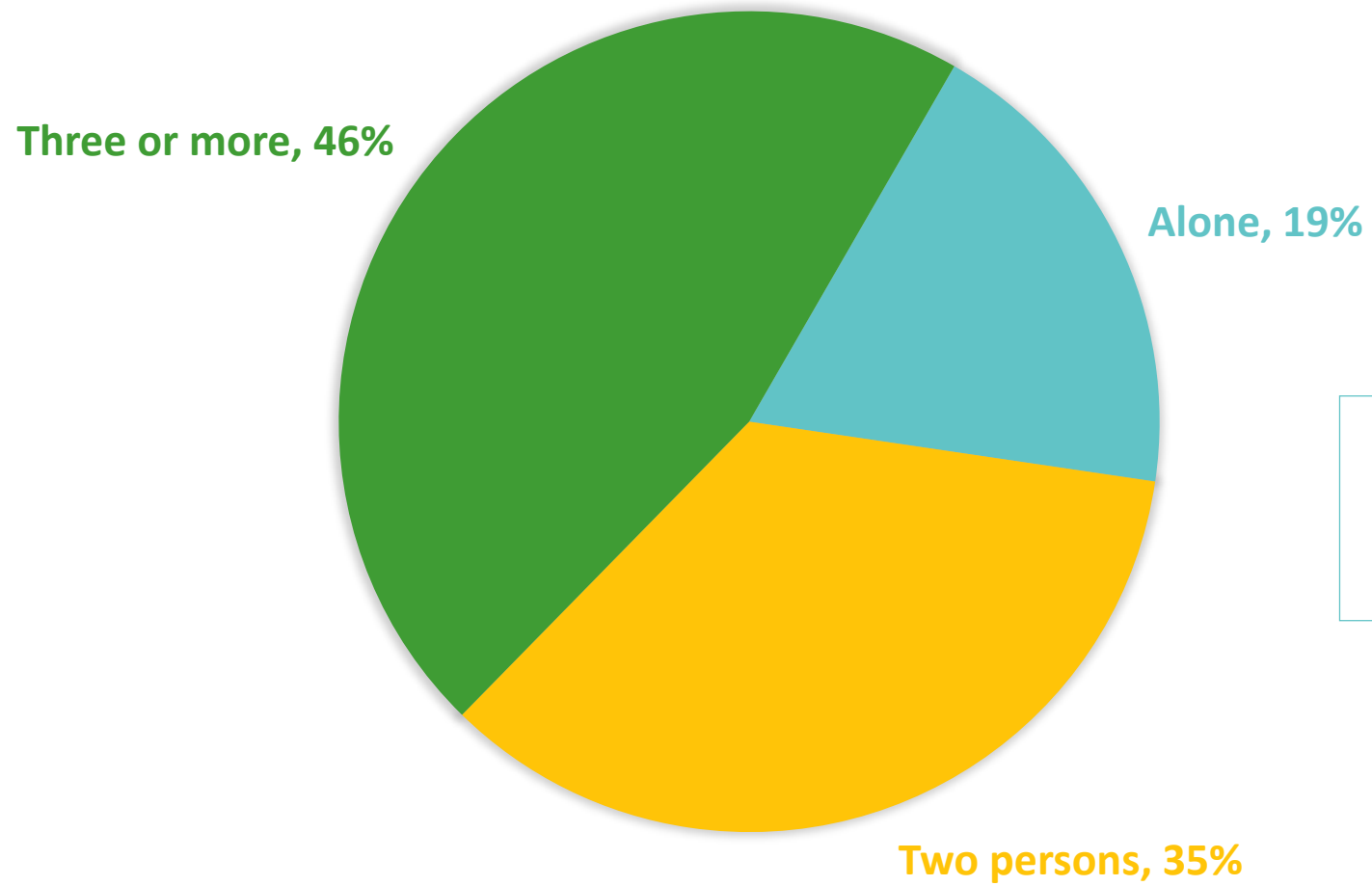
[A]



# TRAVEL PARTY – CHILD UNDER 18

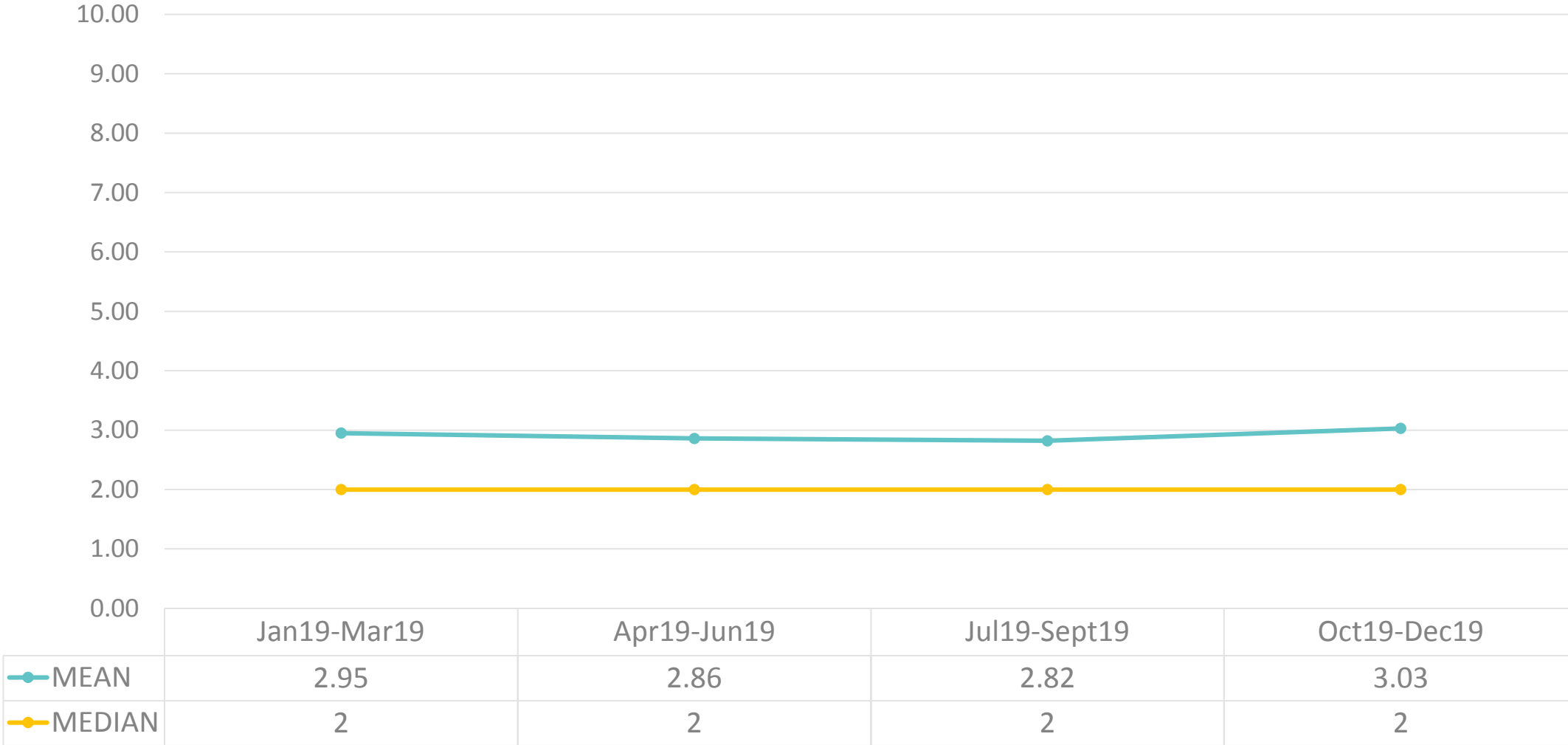


# TRAVEL PARTY SIZE



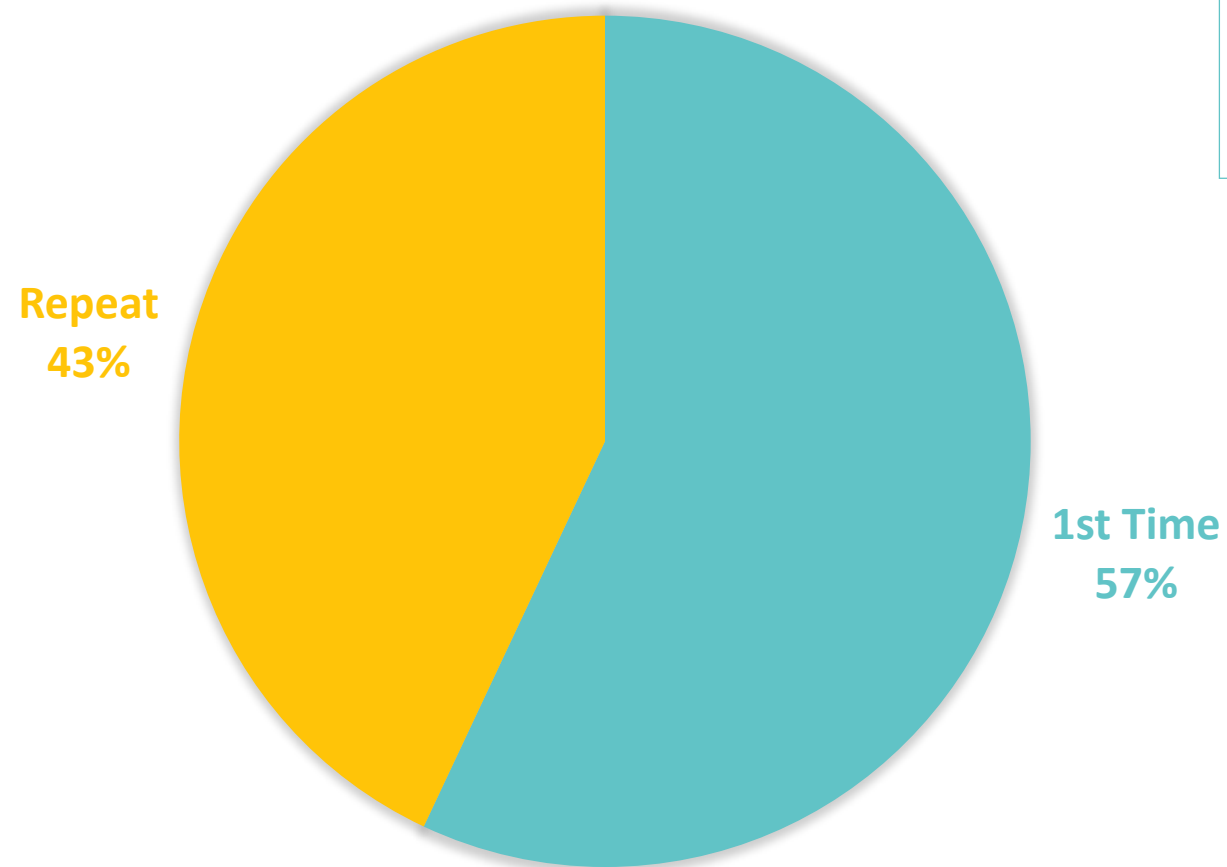
**Mean = 3.03**  
**Median = 2**

# TRAVEL PARTY SIZE – TRACKING



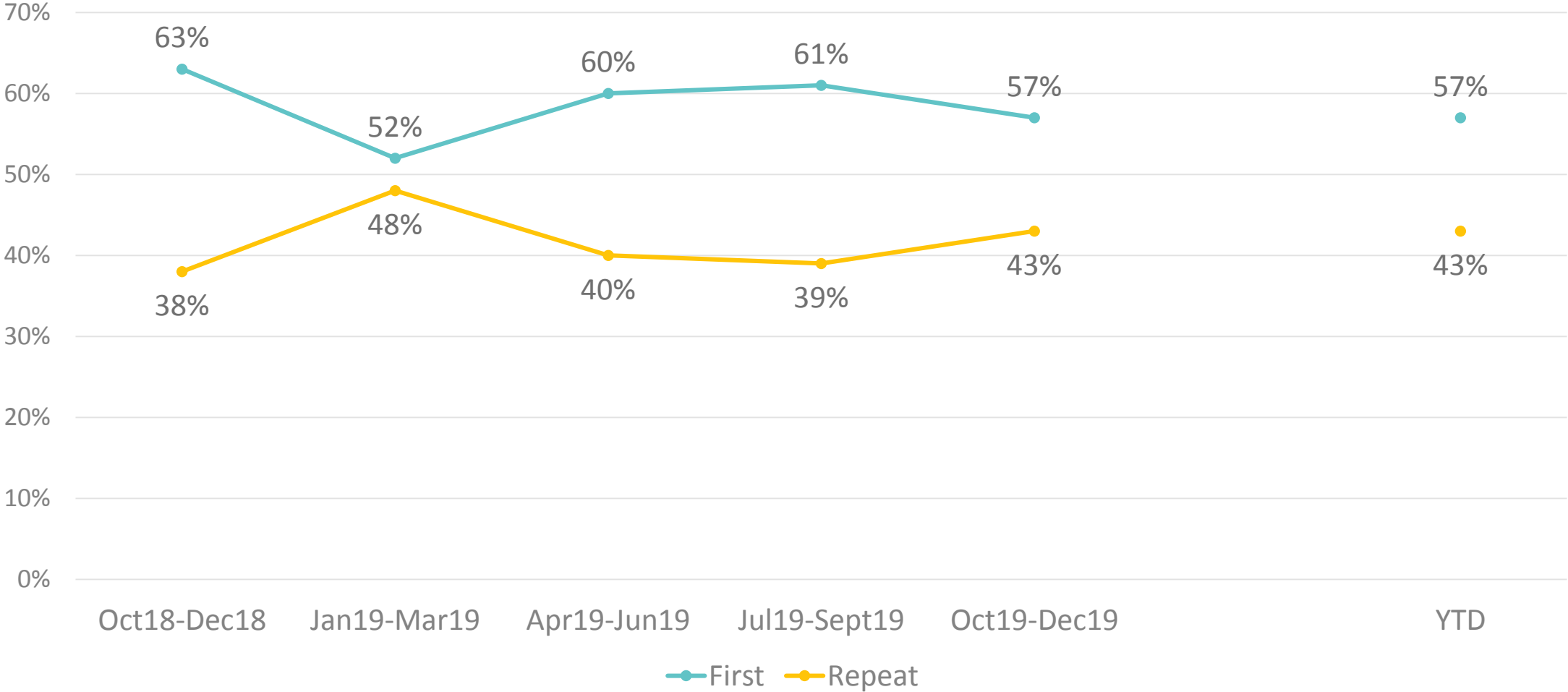


# TRIPS TO GUAM



Mean = 2.37  
Median = 1

# TRIPS TO GUAM – TRACKING



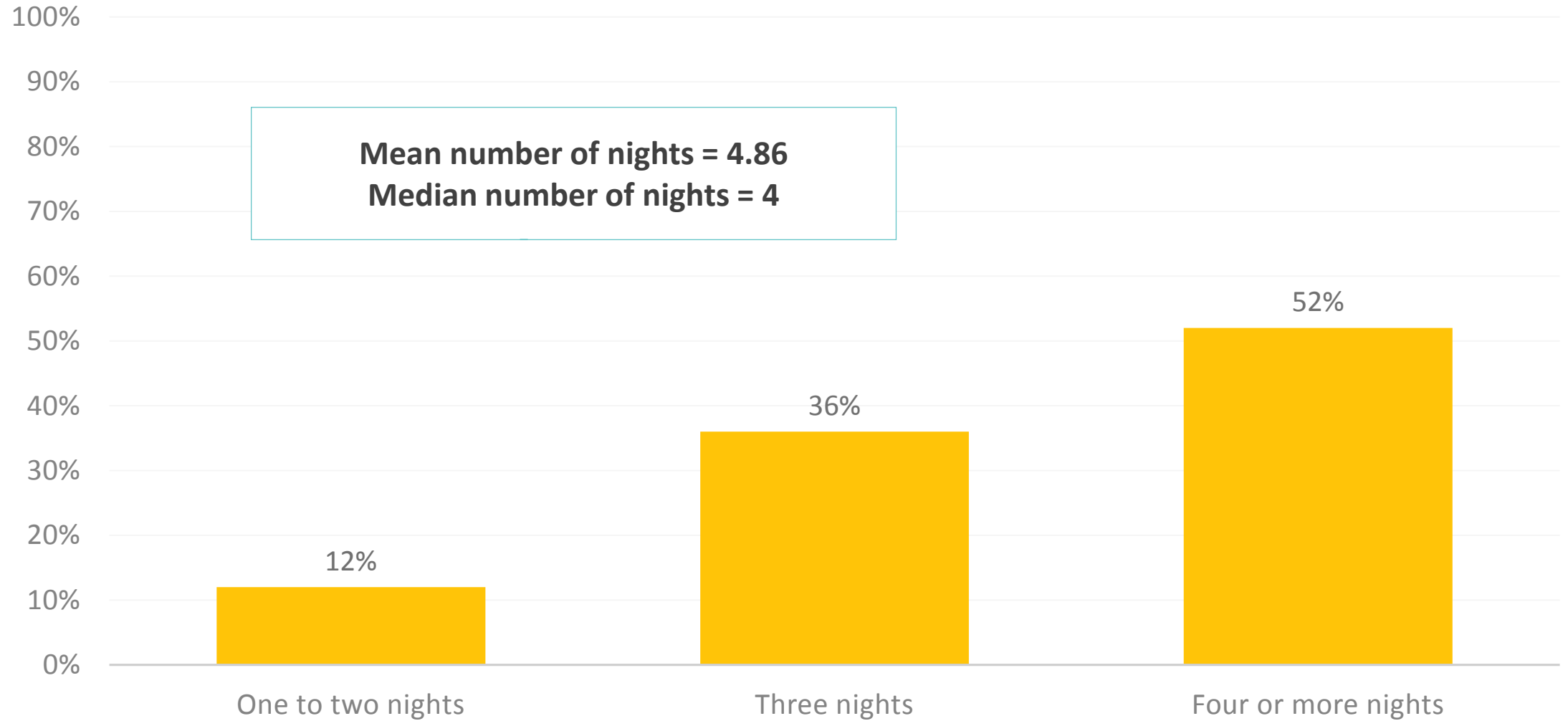
# TRIPS TO GUAM – SEGMENTATION

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

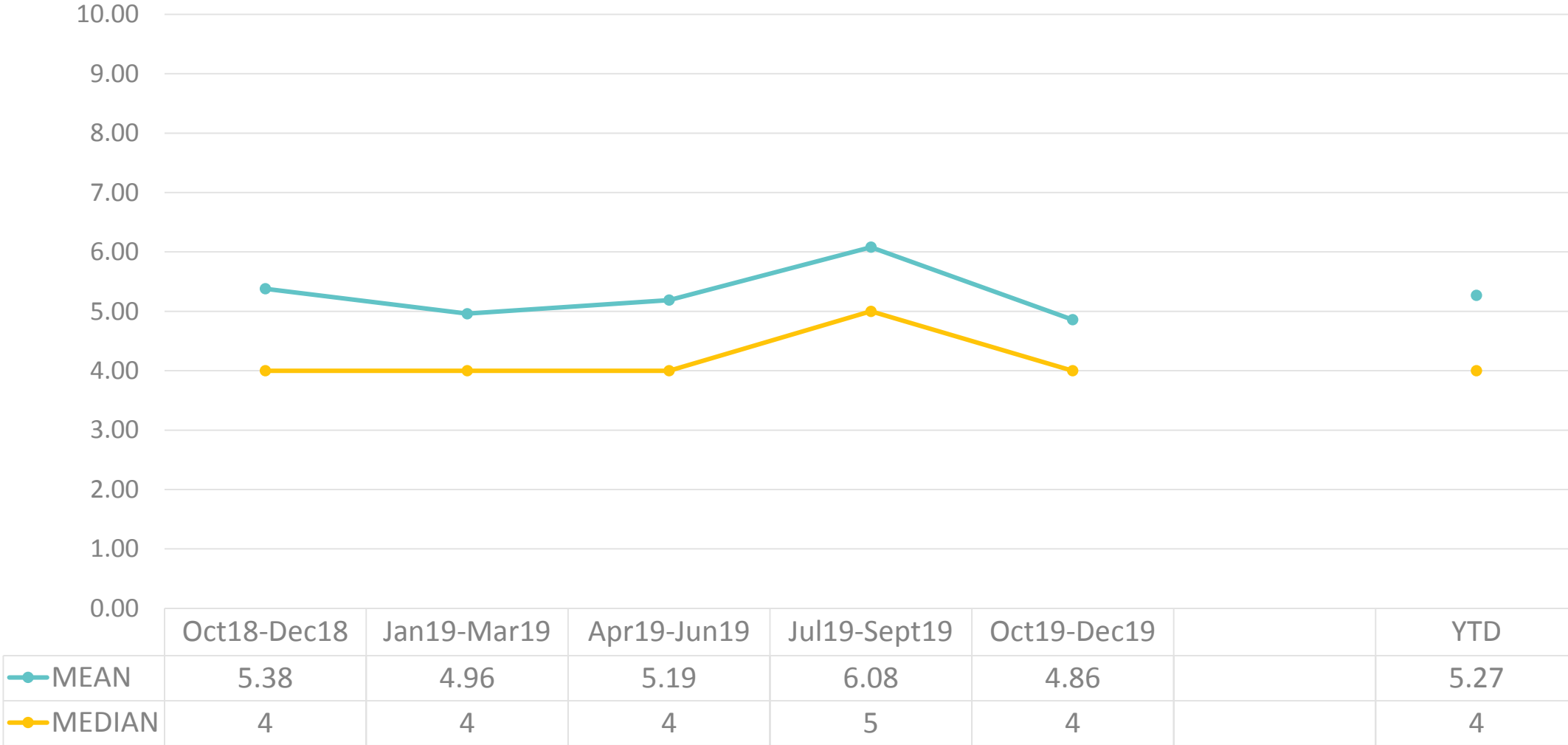
		TOTAL	FAMILY	FIT	MICE	LEISURE
		-	-	-	-	-
Q9	1st time	57%	53%	56%	100%	62%
	Repeat	43%	47%	44%		38%
	Total	102	59	100	2	86
Q9	Mean	2.37	2.34	2.40	1.00	1.85
	Median	1	1	1	1	1

\*Prepared by Anthology Research\*

# LENGTH OF STAY



# LENGTH OF STAY – TRACKING





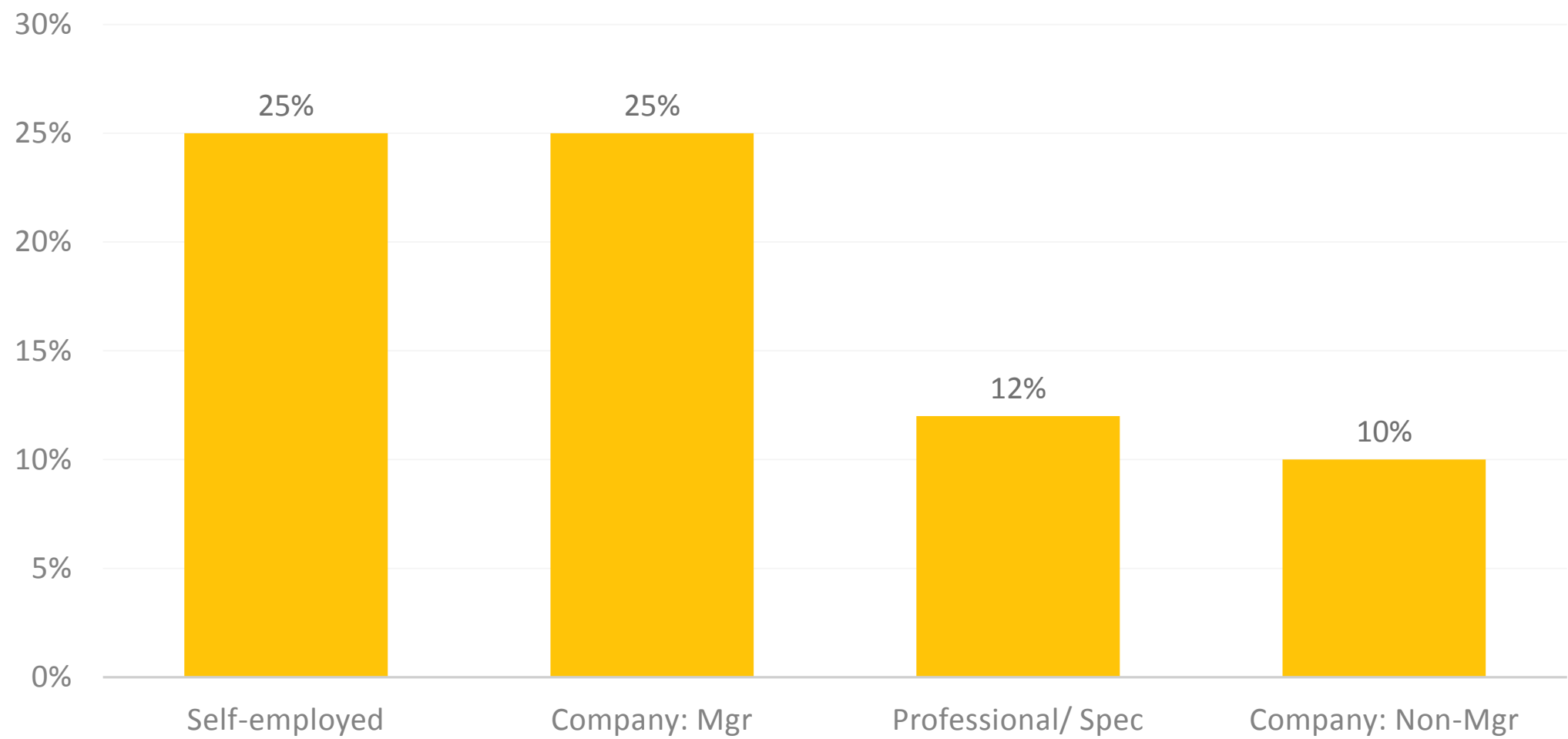
# LENGTH OF STAY – SEGMENTATION

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

		TOTAL	FAMILY	FIT	MICE	LEISURE
		-	-	-	-	-
SA	1-2 nights	12%	14%	12%	50%	12%
	3 nights	36%	39%	35%		38%
	4+	52%	47%	53%	50%	50%
	Total	102	59	100	2	86
SA	Mean	4.86	4.81	4.90	4.00	4.74
	Median	4	3	4	4	4

\*Prepared by Anthology Research\*

# OCCUPATION – Top Responses (10%+)



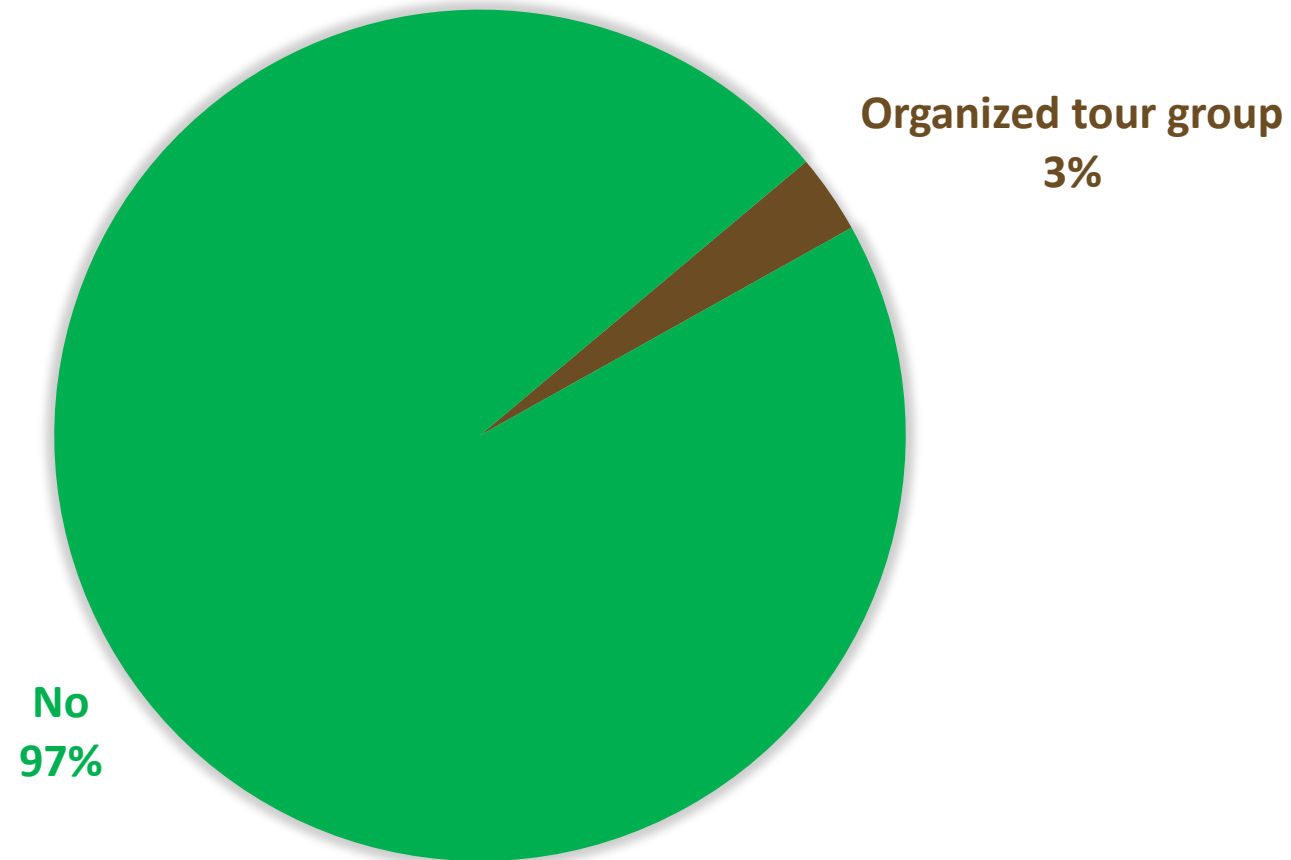


## SECTION 2

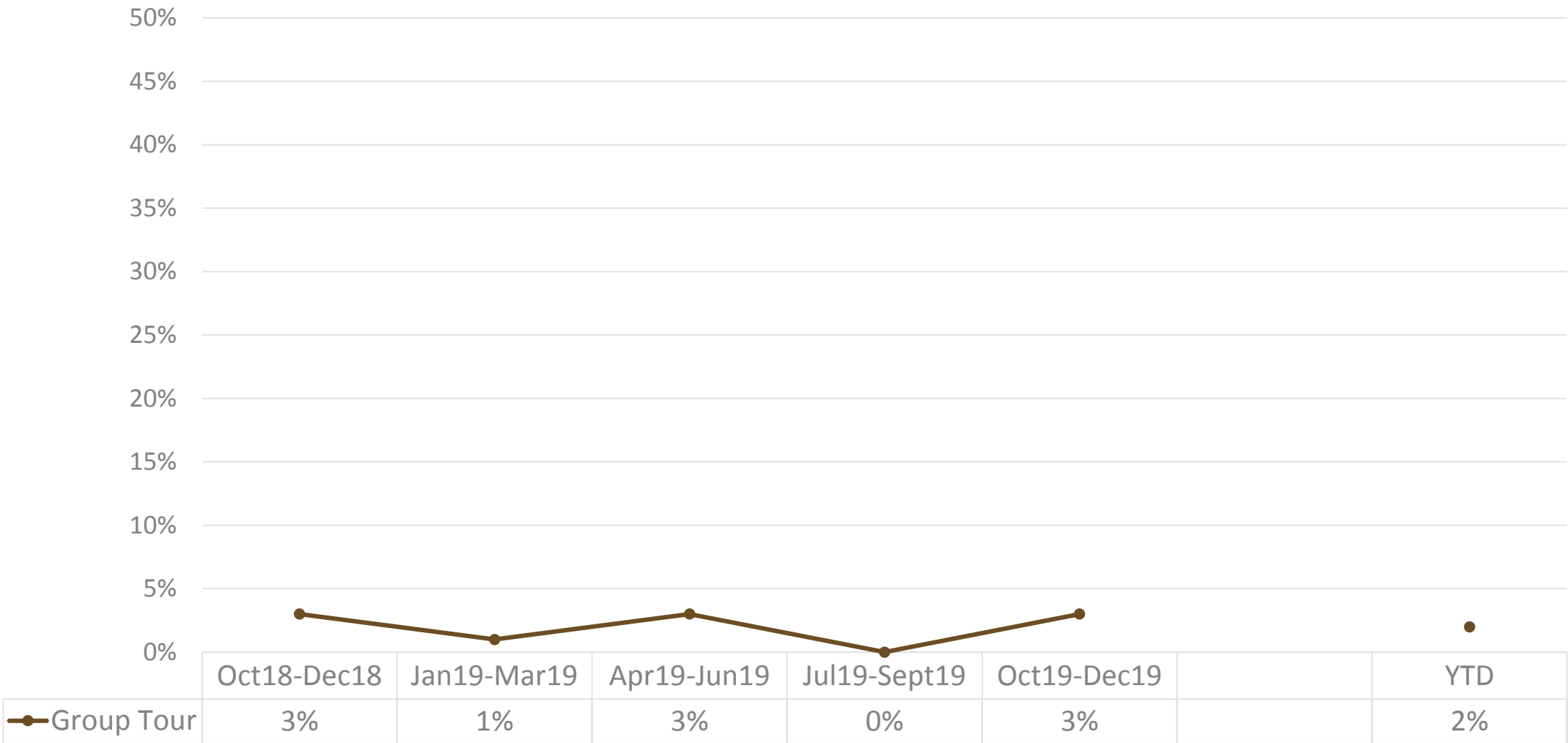
# TRAVEL PLANNING



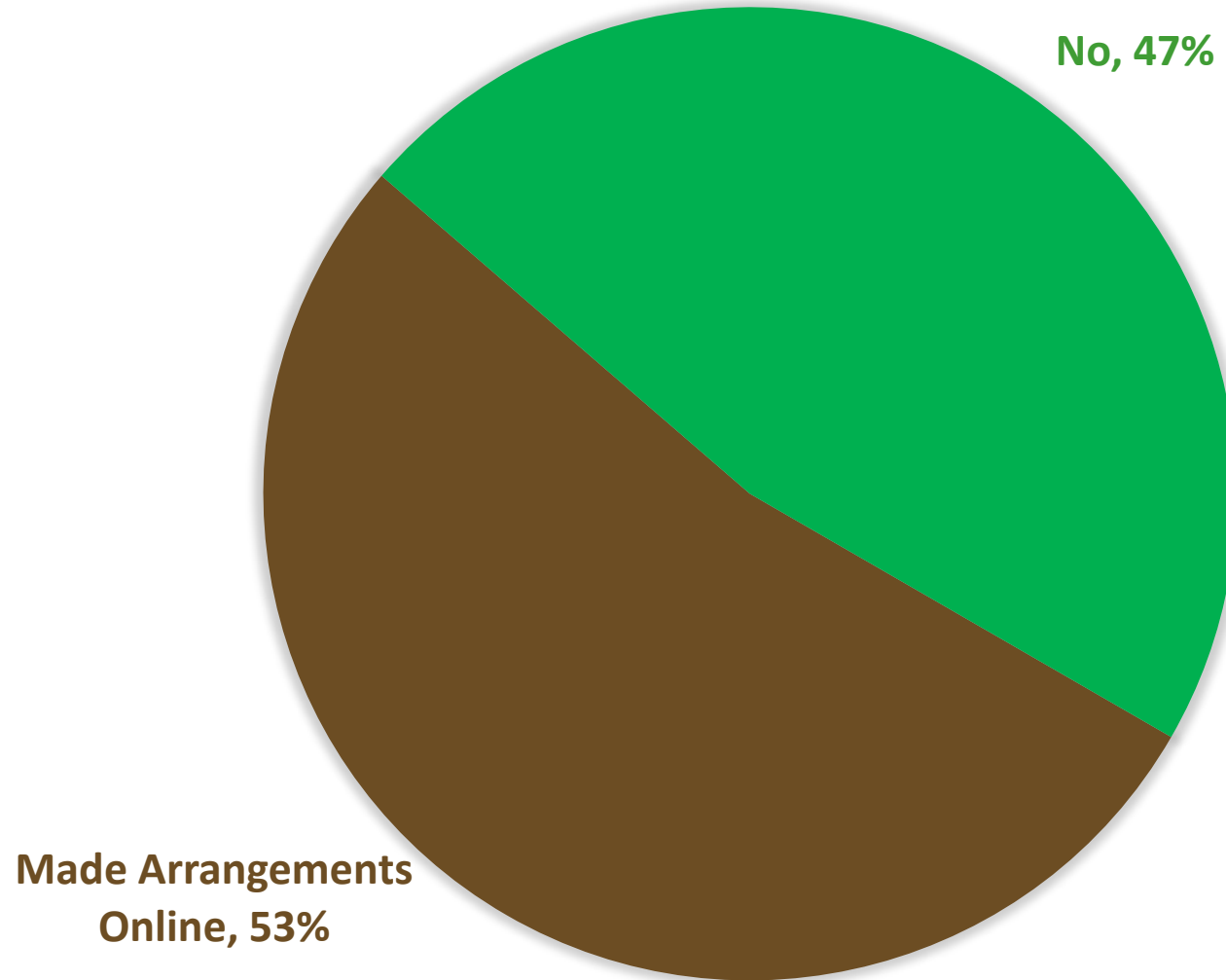
# ORGANIZED TOUR GROUP



# ORGANIZED TOUR GROUP – TRACKING

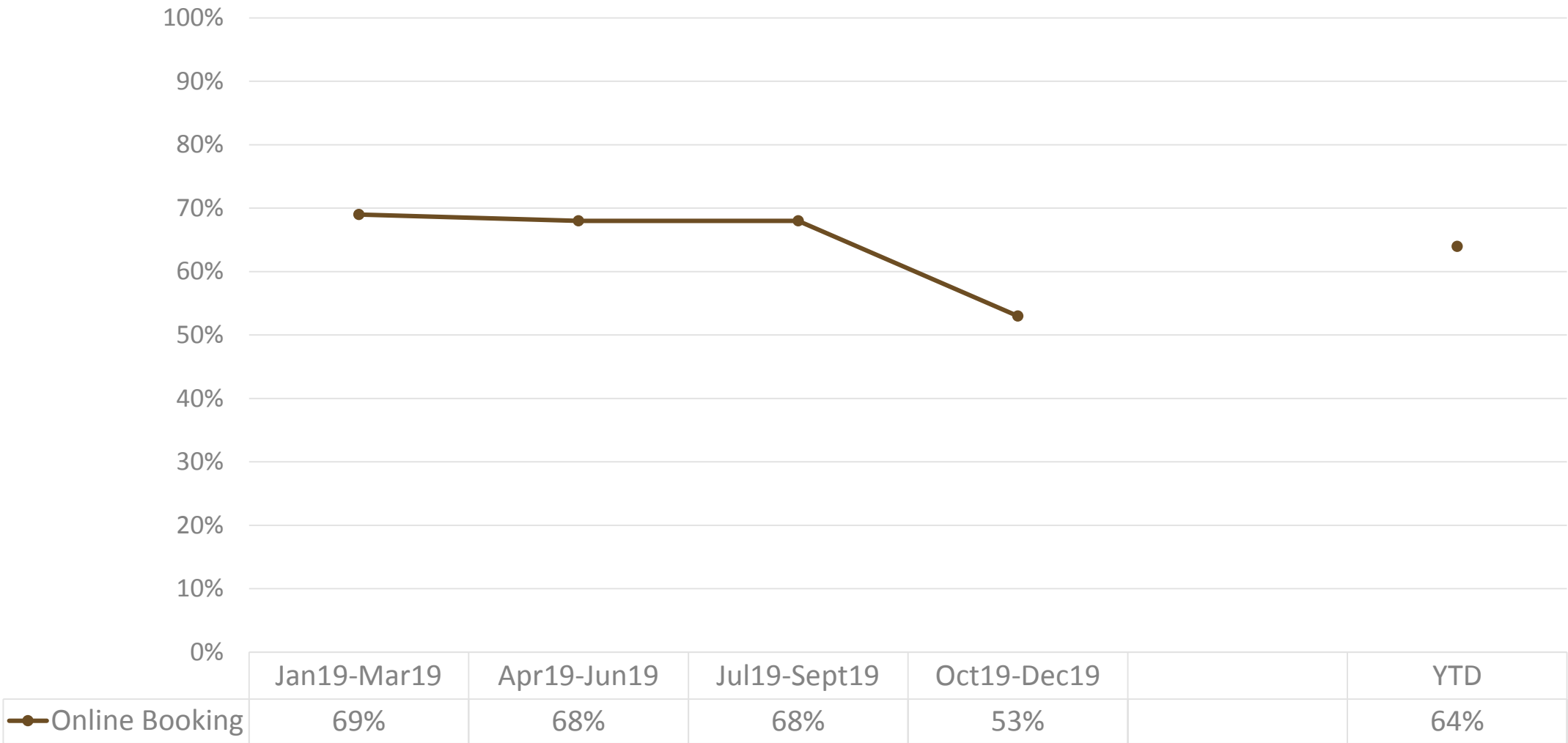


# ONLINE BOOKING

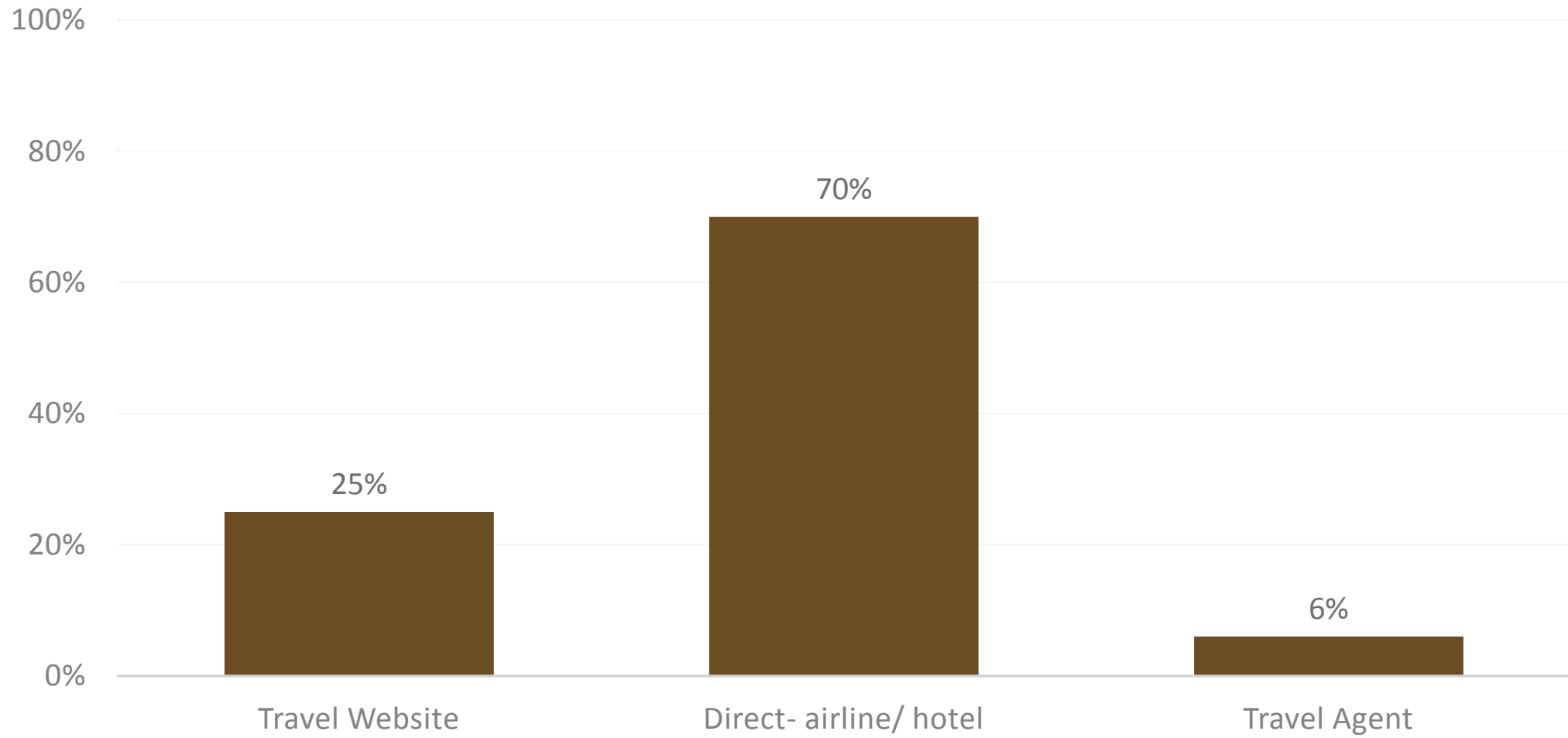




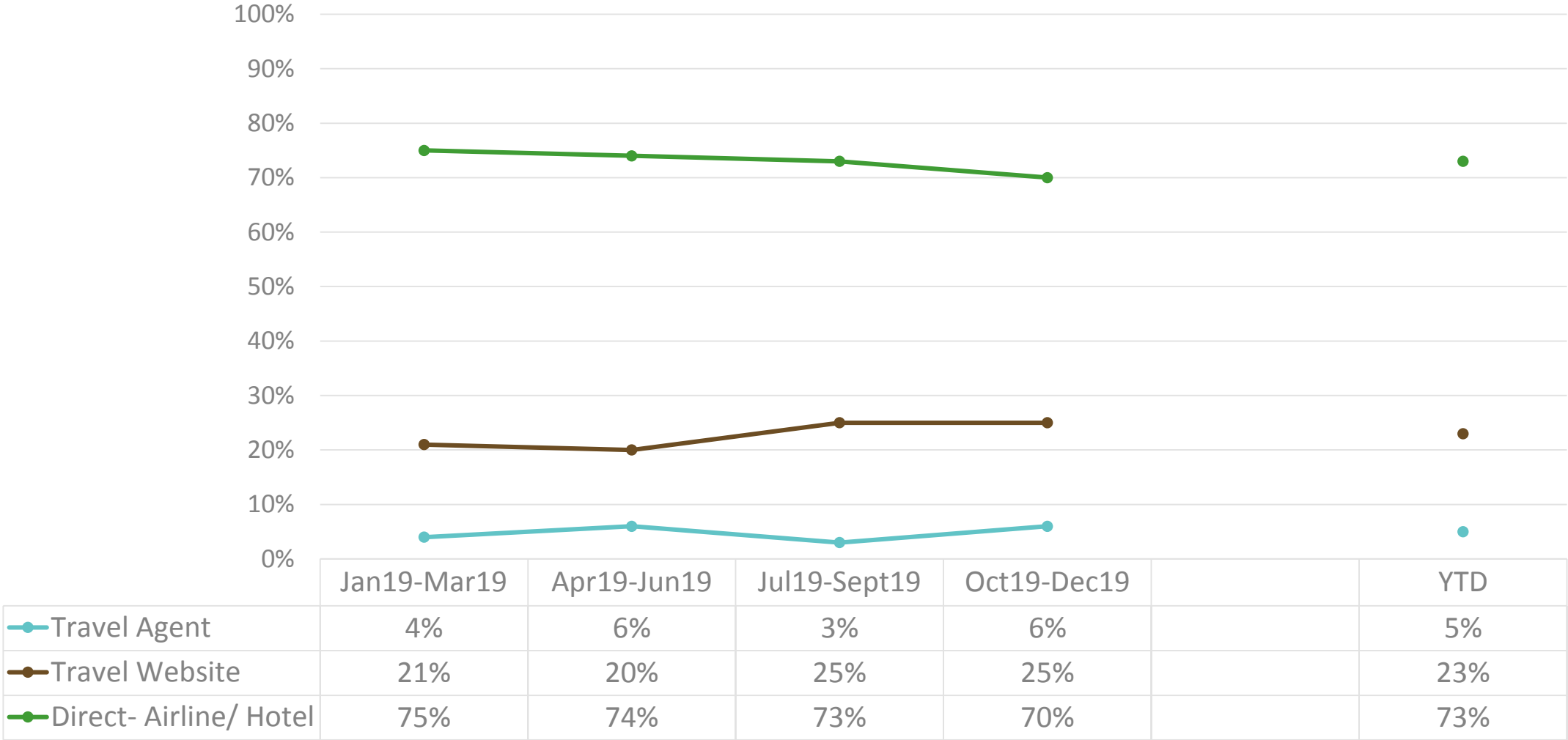
# ONLINE BOOKING – TRACKING



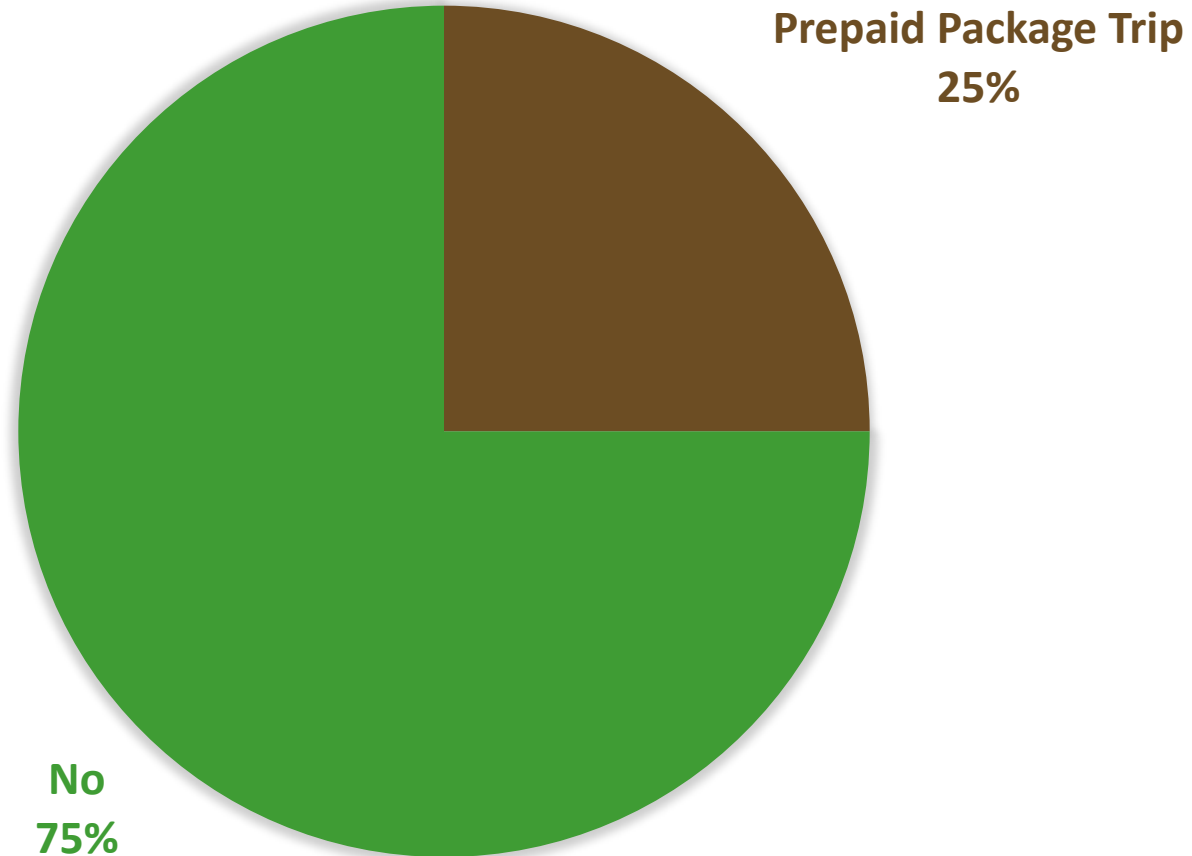
# TRAVEL ARRANGEMENTS



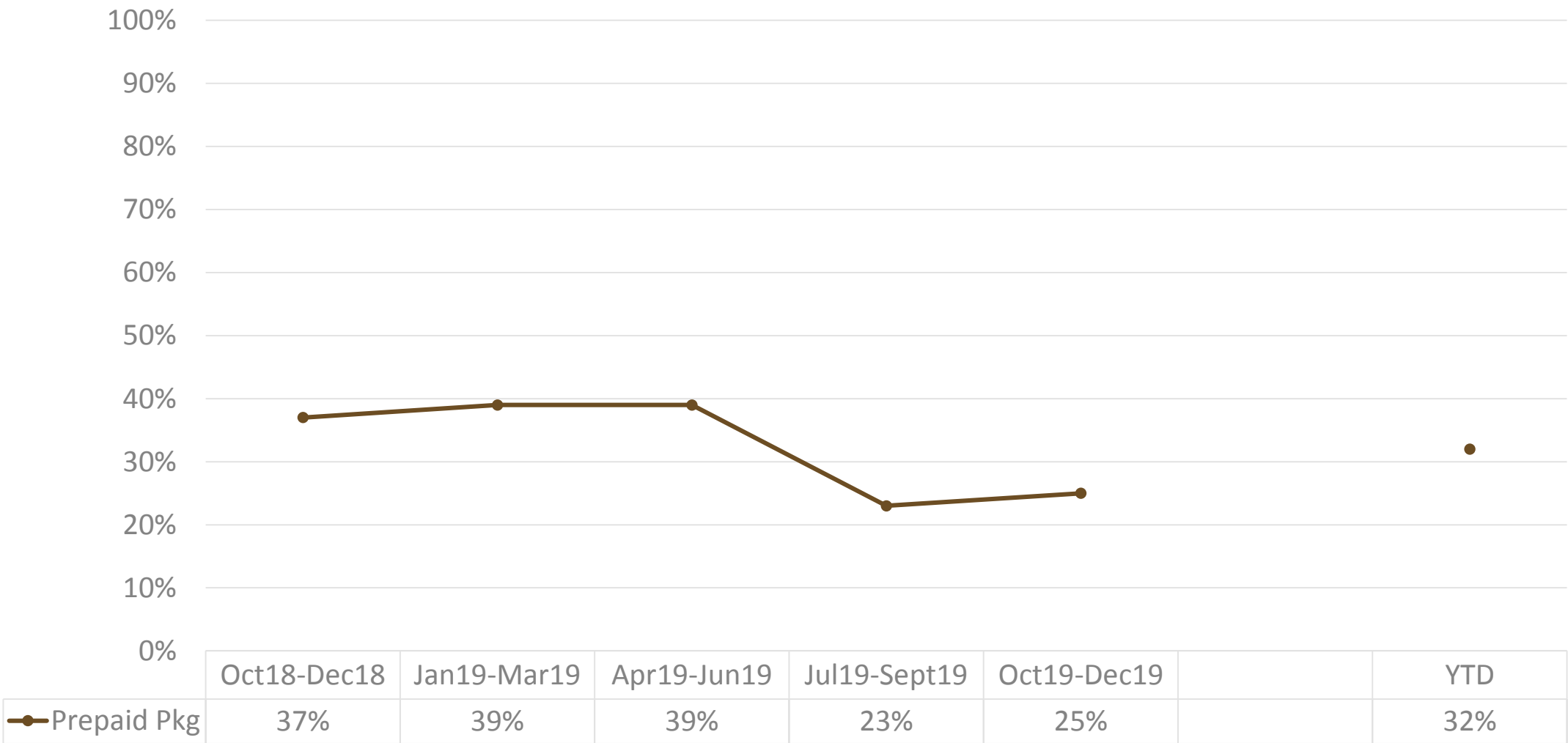
# TRAVEL ARRANGEMENTS – TRACKING



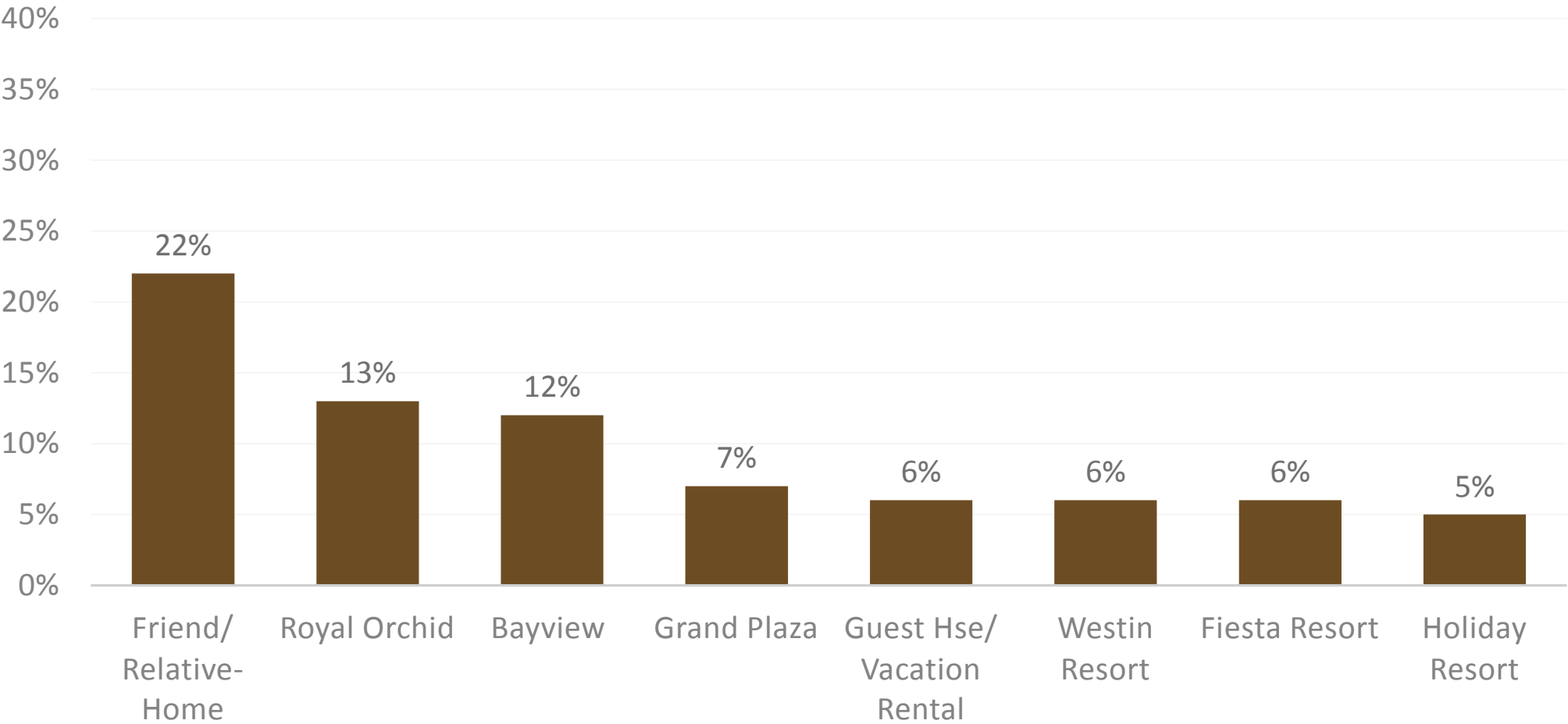
# PREPAID PACKAGE TRIP



# PREPAID PACKAGE TRIP

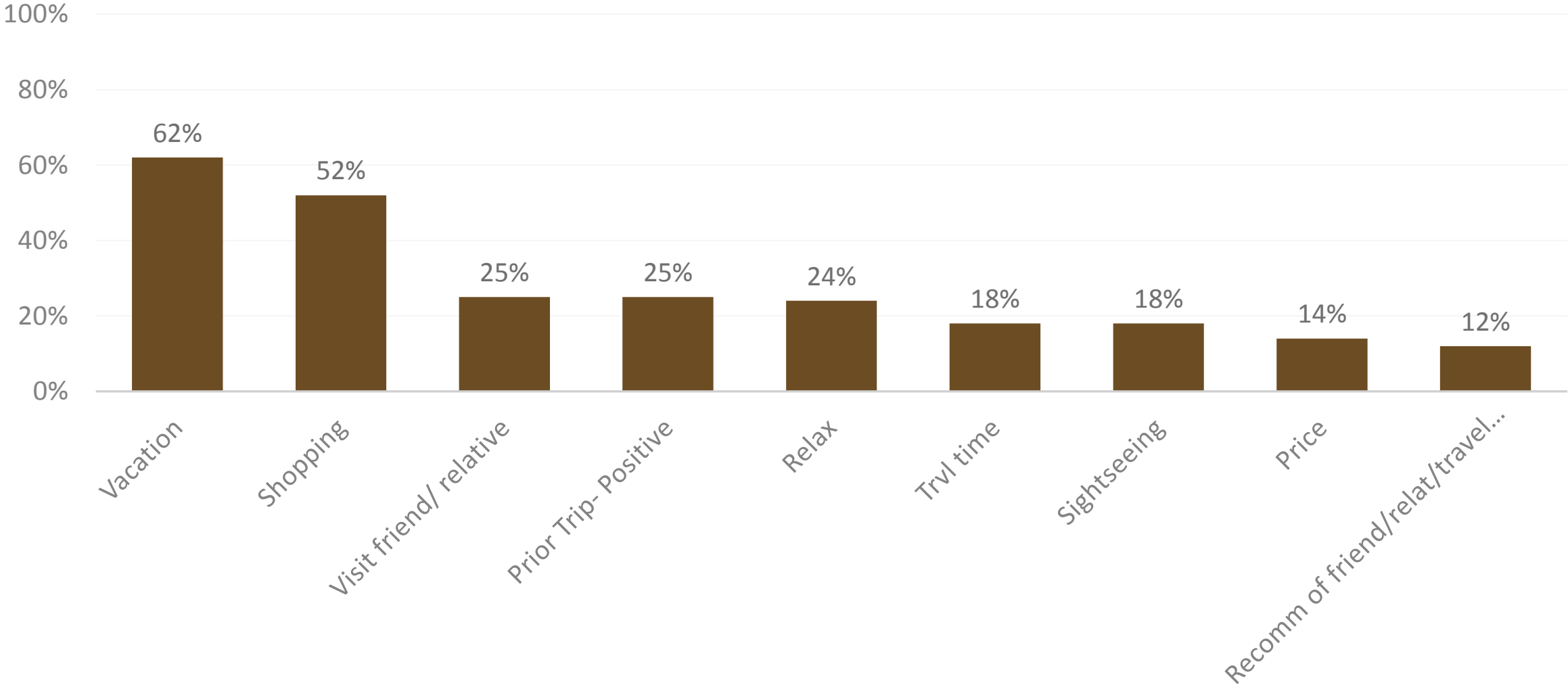


# ACCOMMODATIONS (5%+)





# 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	LEISURE
		-	-	-	-	-
Q8	Vacation	62%	68%	62%	50%	73%
	Shopping	52%	51%	52%	50%	52%
	A previous visit	25%	31%	26%		20%
	To visit friends or relatives	25%	24%	25%		20%
	Just to relax	24%	22%	24%		28%
	Short travel time (not too far from home)	18%	15%	18%	50%	20%
	Sightseeing/ visiting tourist spots	18%	15%	16%	50%	21%
	Price of the tour package	14%	15%	13%		8%
	Recommendation of friend/ relative/ travel agency	12%	15%	11%		10%
	Beautiful seas, beaches, tropical climate	9%	7%	9%		10%
	It is a safe place to spend a vacation	6%	2%	6%		6%
	Honeymoon	5%	7%	5%		6%
	Adventure	4%	3%	4%		5%
	Water sports (snorkeling, windsurfing, parasailing)	3%		3%		2%
	Career certification/ testing	2%	3%	2%		
	Shop Guam e-Festival	2%	2%	2%		1%
	Scuba diving	1%		1%		
	Convention/ conference/ trade show/ meeting	1%	2%	1%	50%	1%
	Incentive trip	1%		1%	50%	1%
	Social Media networks	1%		1%		
	Total	102	59	100	2	86

\*Prepared by Anthology Research\*



## SECTION 3

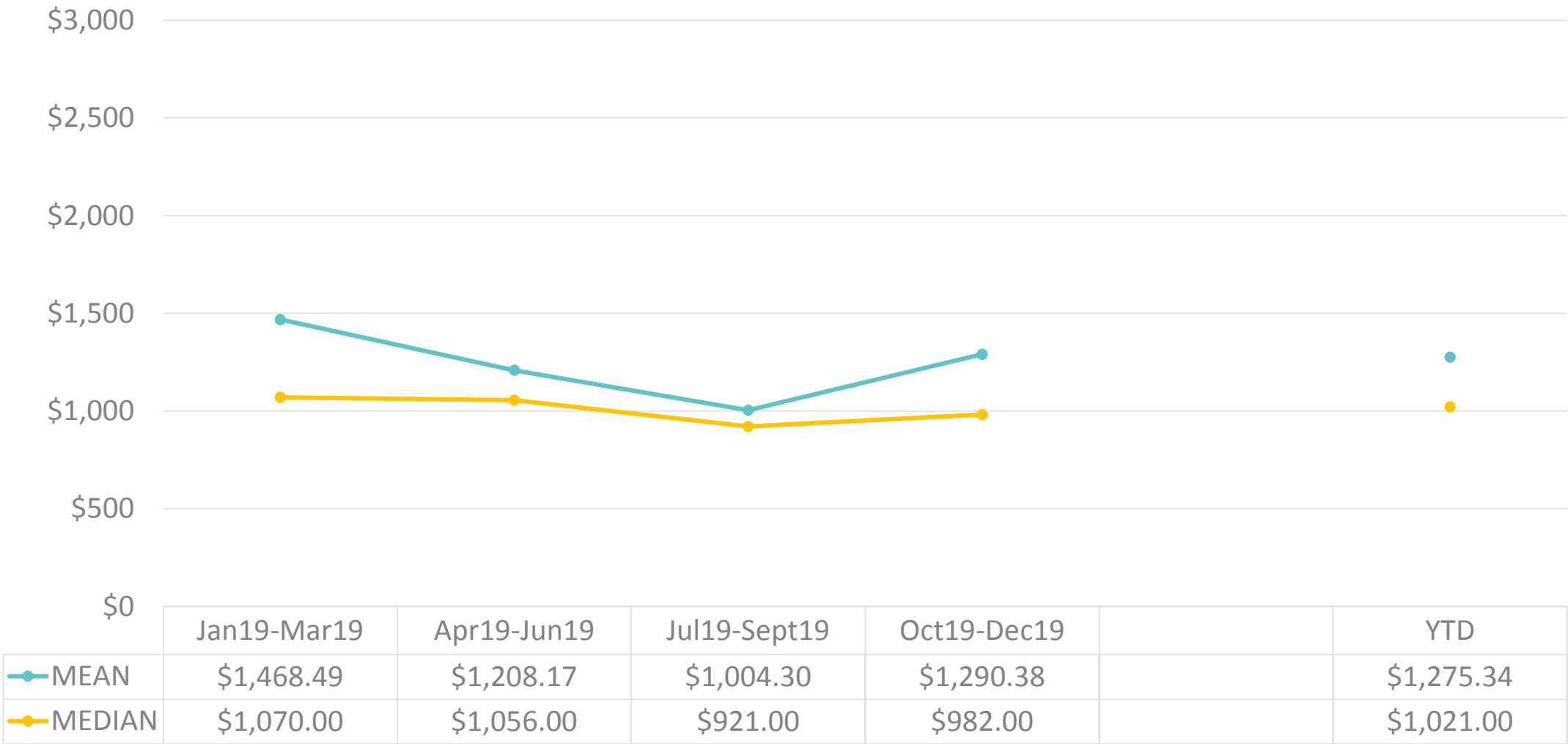
# EXPENDITURES



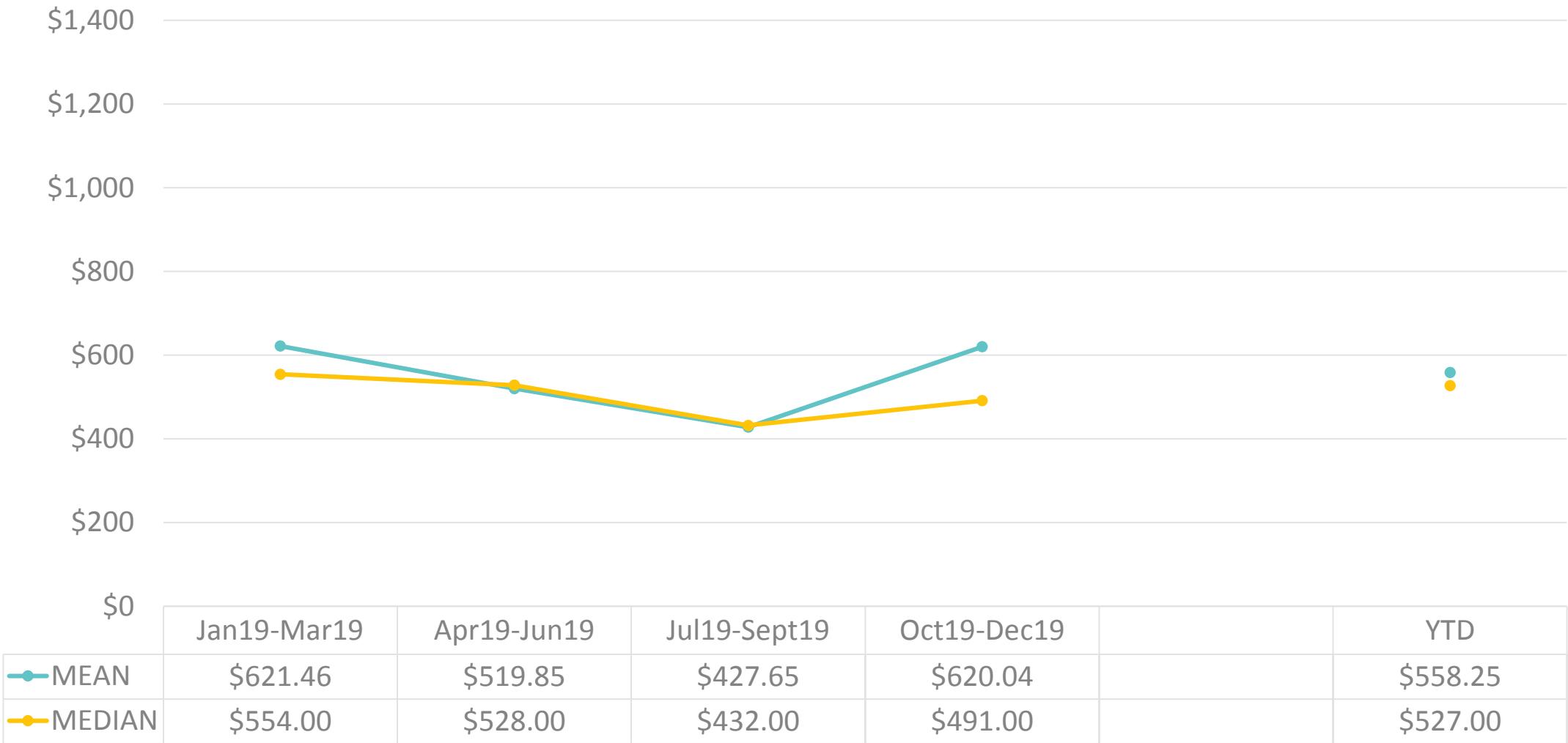
# PREPAID PACKAGE EXPENDITURES

- \$1,290.38 = overall mean average prepaid package expense (for entire travel party) by respondent
- \$620.04 = overall mean average **per person** prepaid package expenditures

# PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING



# PREPAID PACKAGE – PER PERSON EXPENSE TRACKING





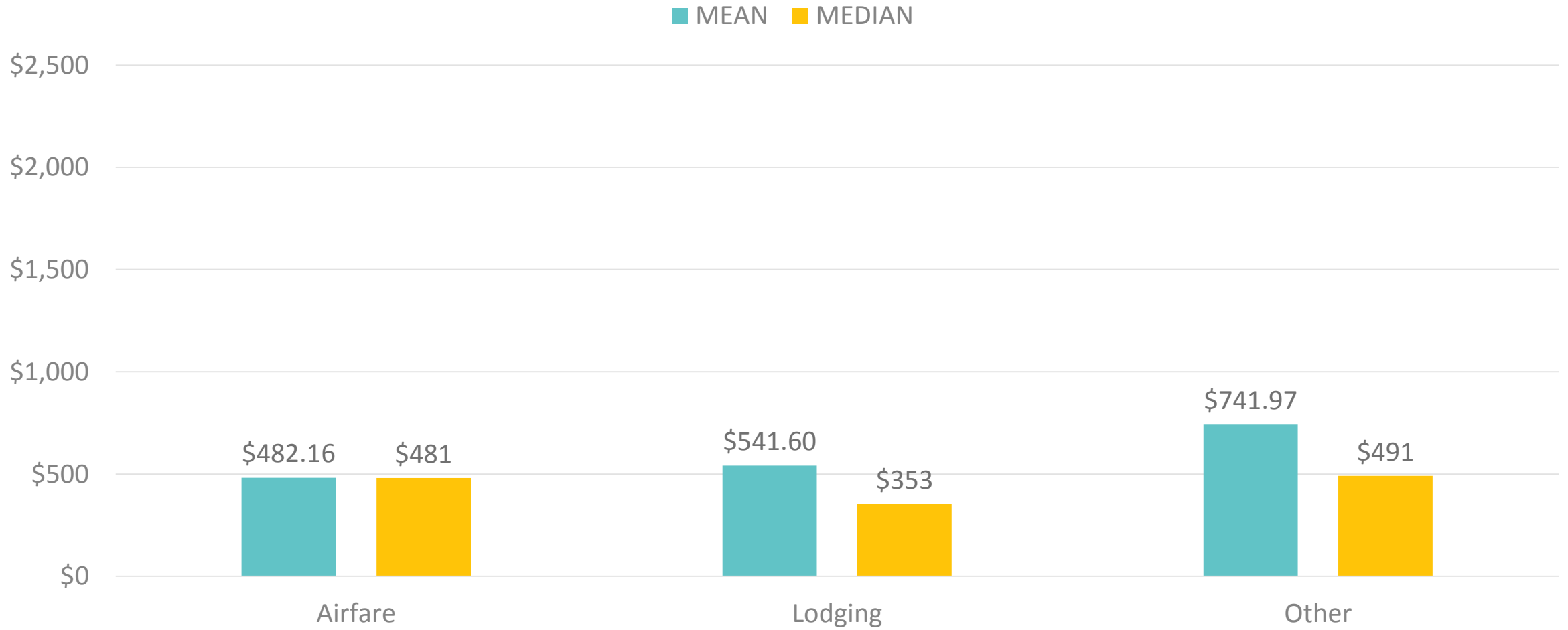
# PREPAID PACKAGE – PER PERSON EXPENSE SEGMENTATION

**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	\$620.04	\$640.91	\$647.46	\$760.70	\$487.76
	Median	\$491	\$351	\$491	\$761	\$421

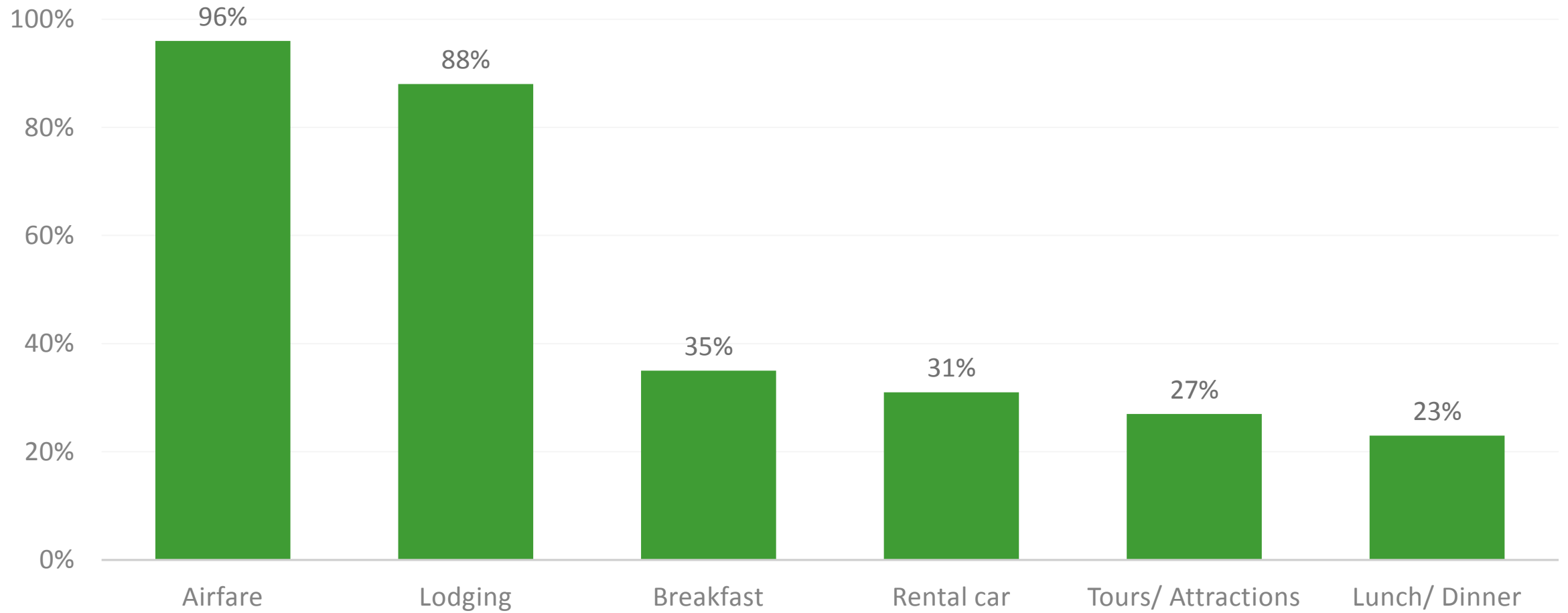
\*Prepared by Anthology Research\*

# PREPAID PACKAGE – BREAKDOWN





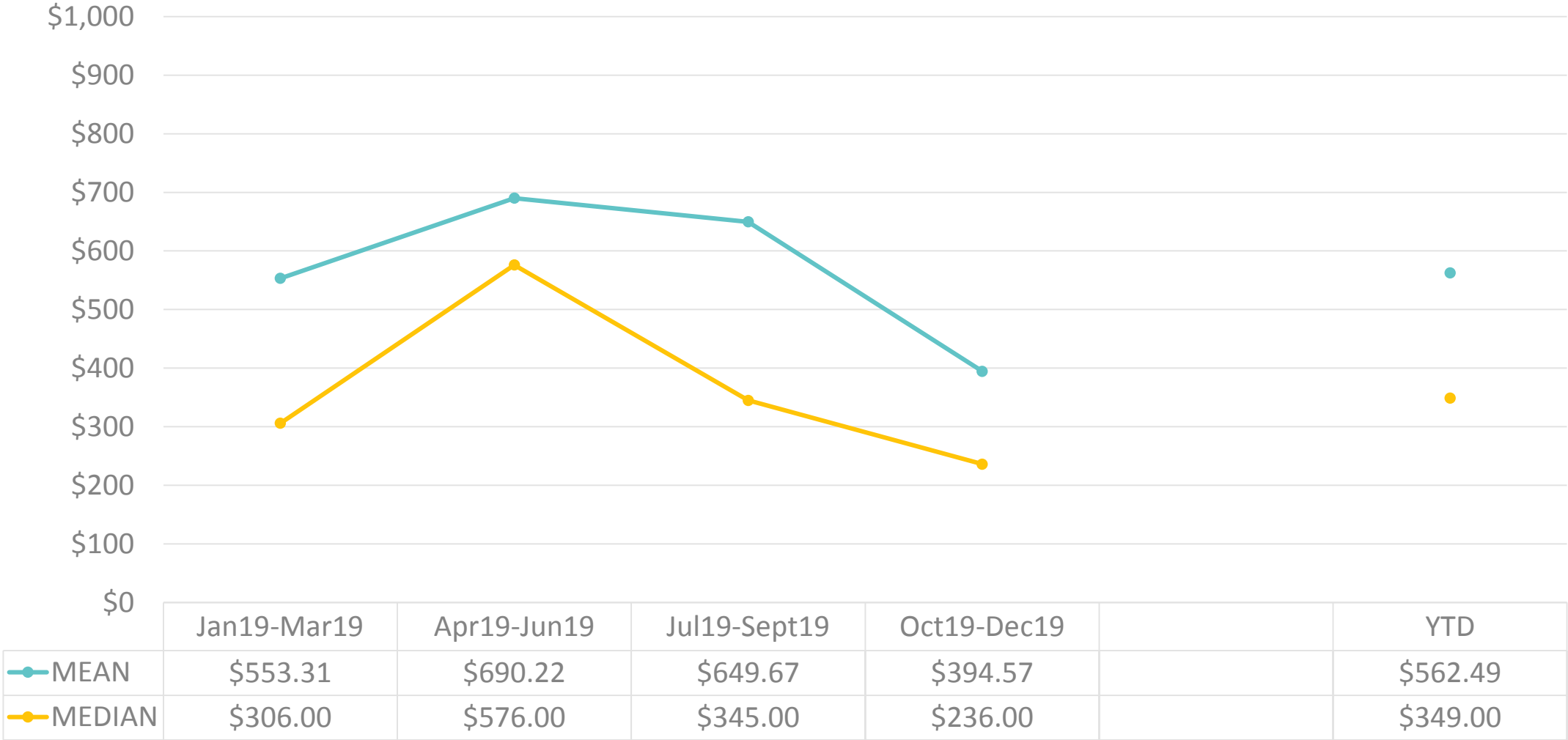
# PREPAID PACKAGE – BREAKDOWN



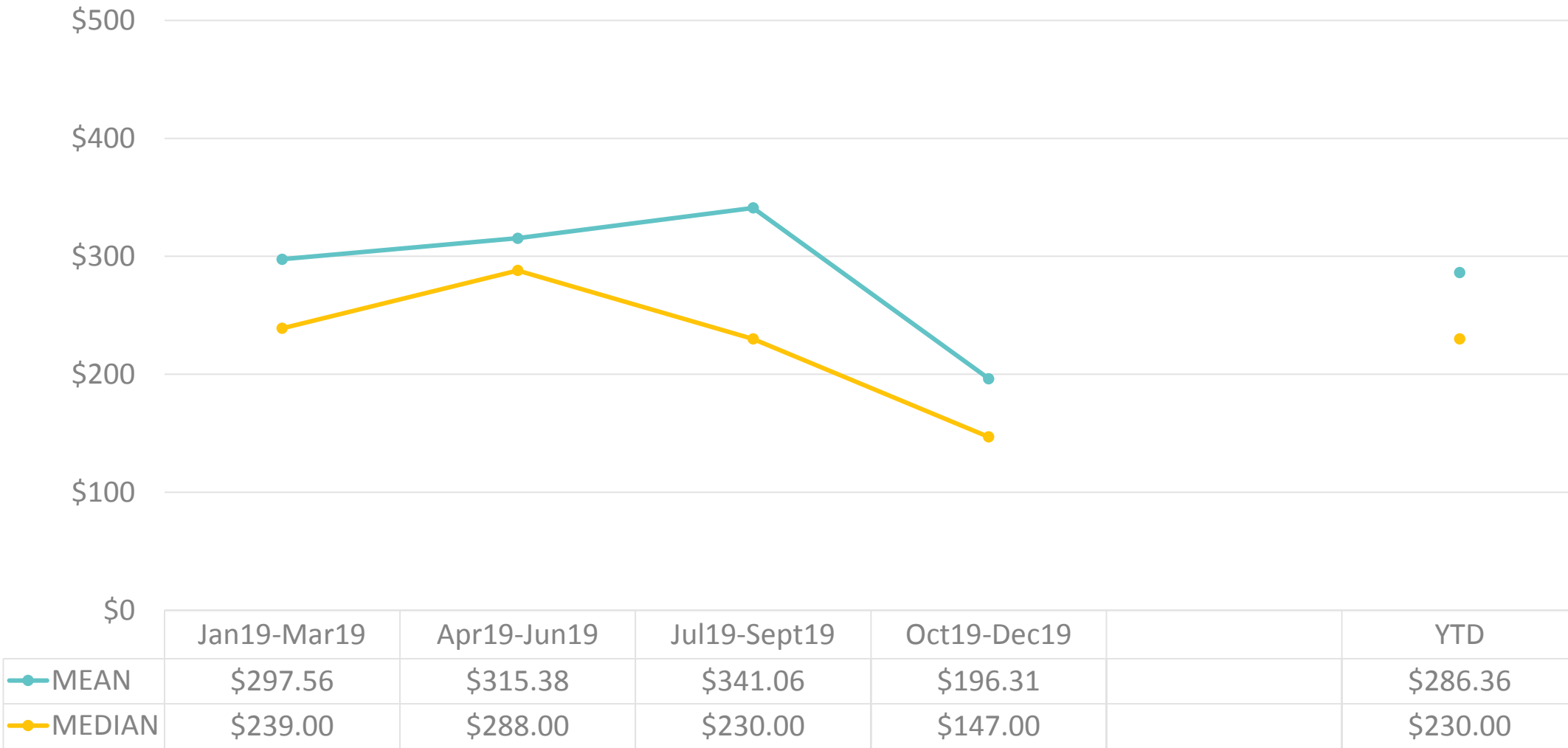
# AIRFARE – FIT TRAVELER

- \$358.23 = overall mean average airfare expense (for entire travel party) by respondent
- \$178.23 = overall mean average **per person** airfare expenditures

# AIRFARE – FIT TRAVELER (GROUP) TRACKING



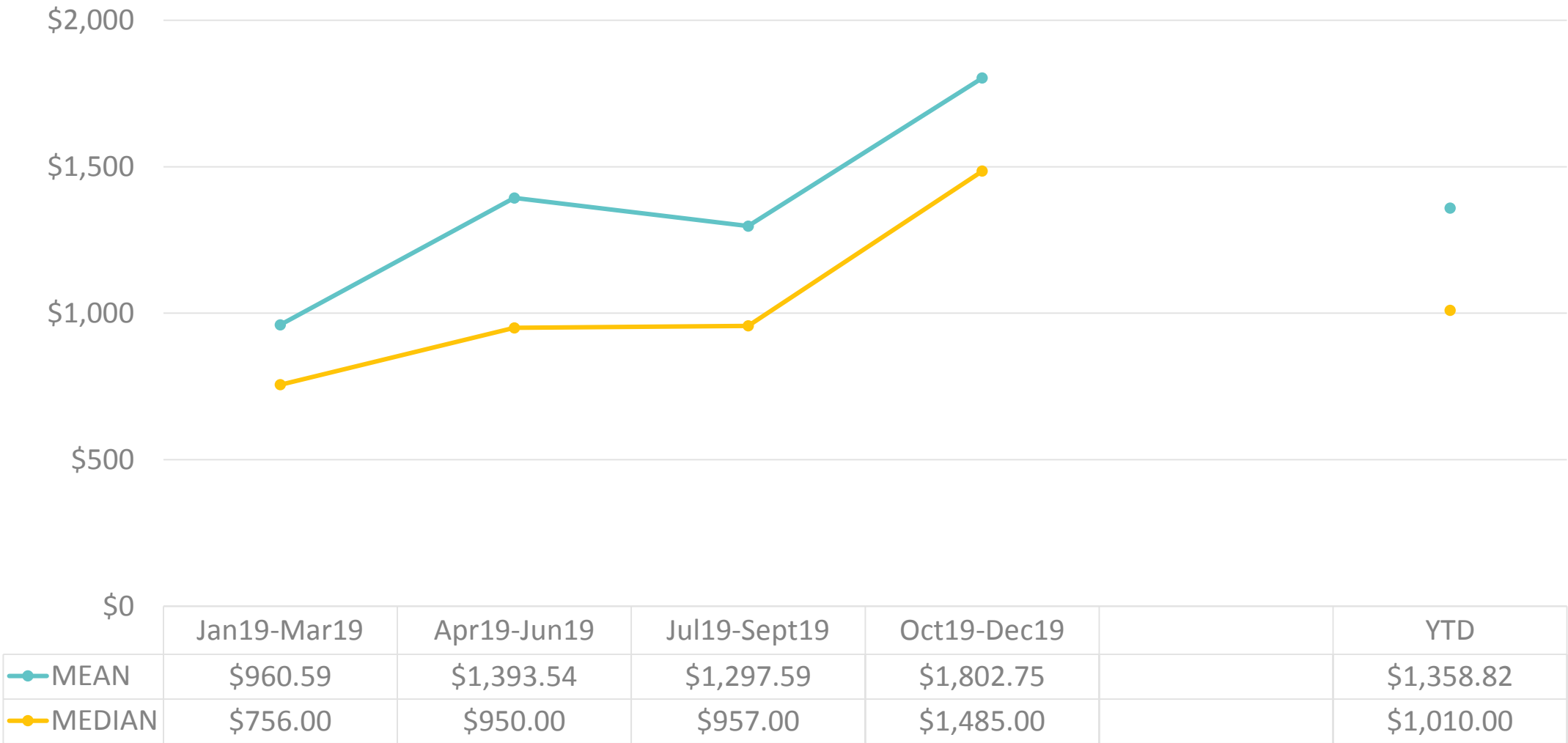
# AIRFARE – FIT TRAVELER (Per Person) TRACKING



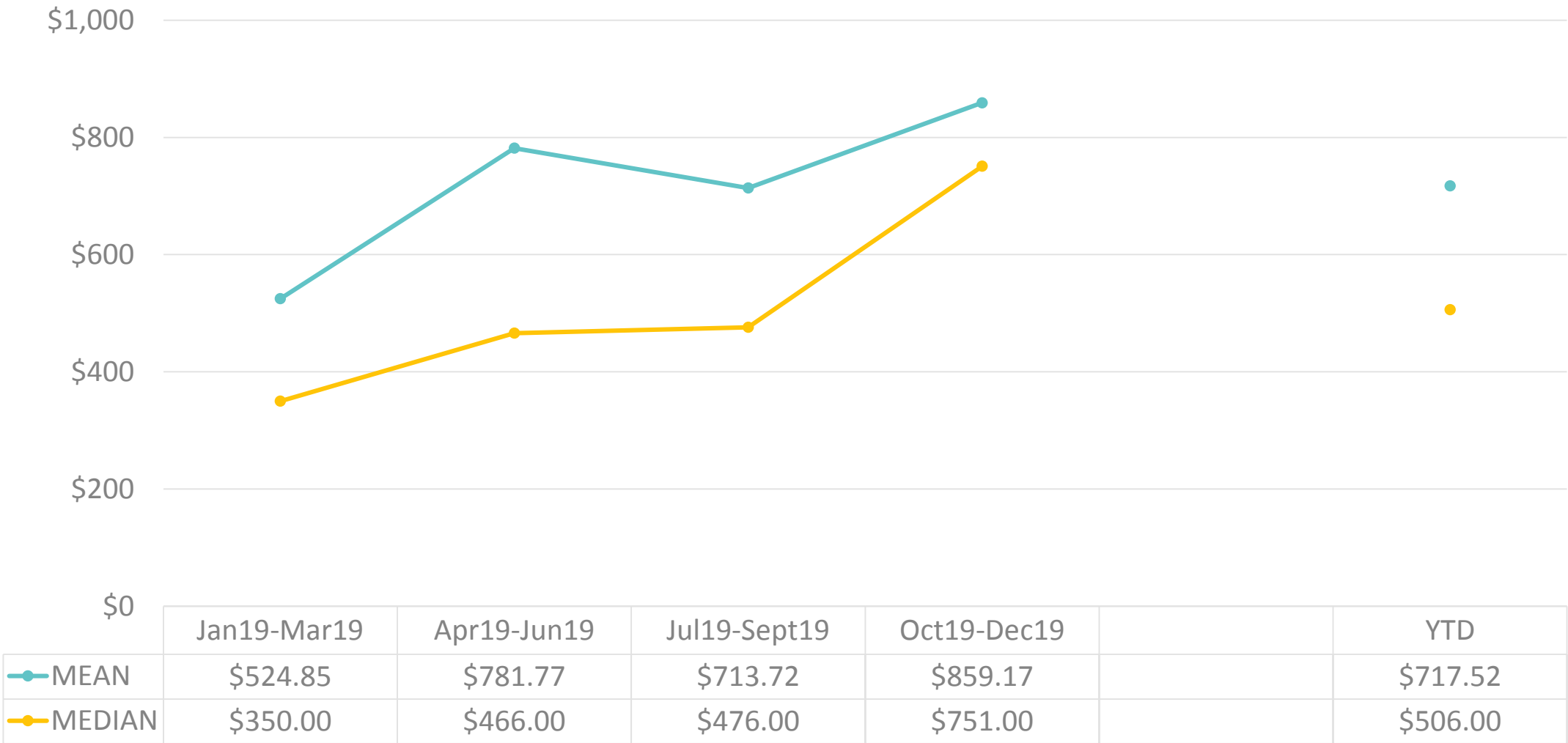
# ONISLE EXPENDITURES

- \$1,802.75 = overall mean average expense (for entire travel party) by respondent
- \$859.17 = overall mean average **per person** expenditures

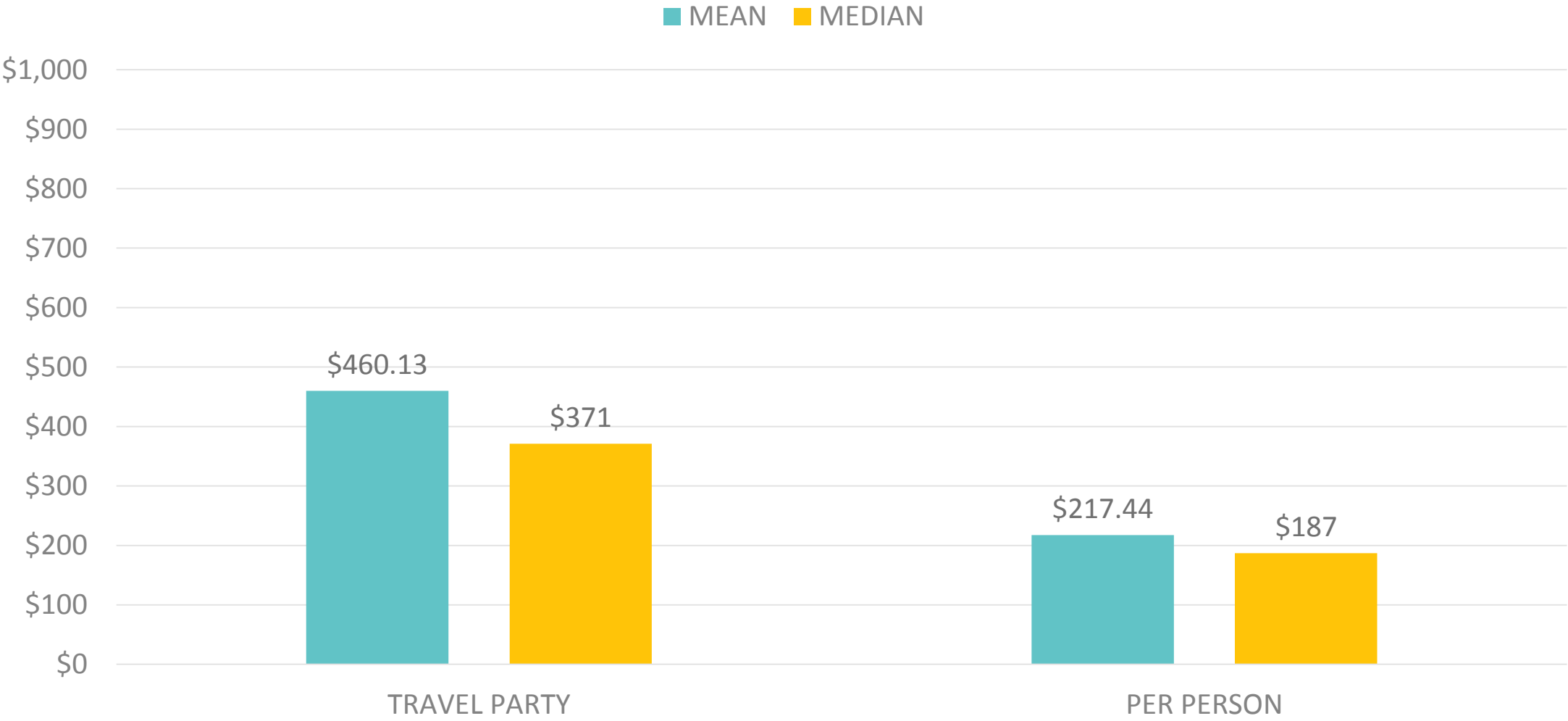
# ONISLE – TRAVEL PARTY TRACKING



# ONISLE – PER PERSON TRACKING

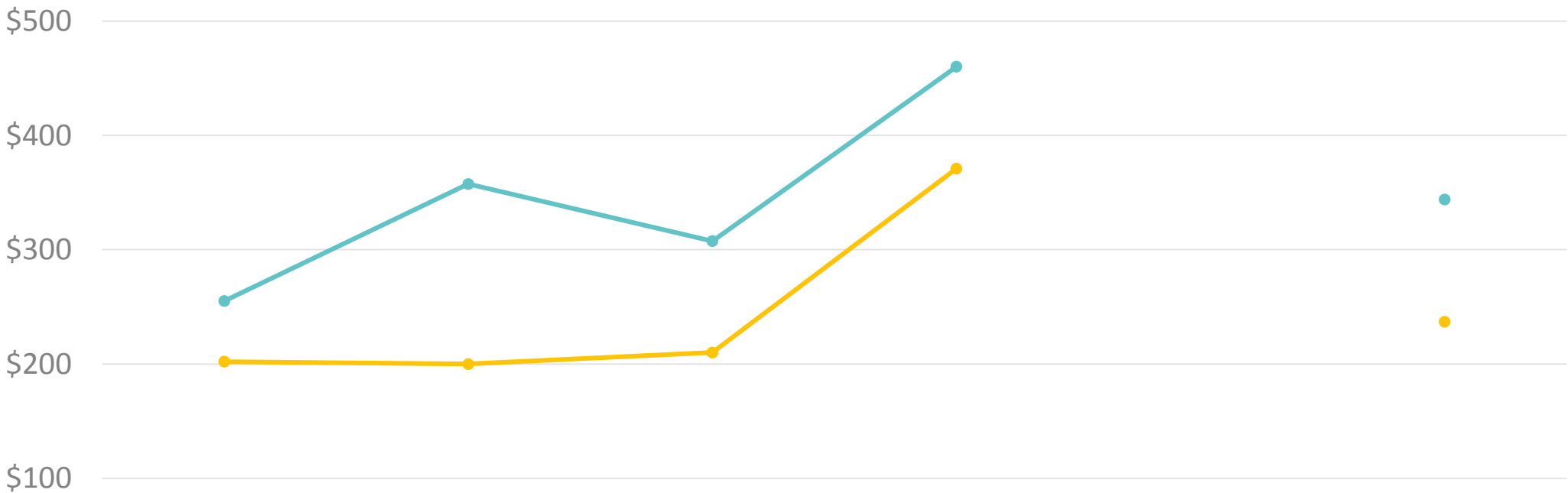


# ONISLE – PER DAY SPENDING



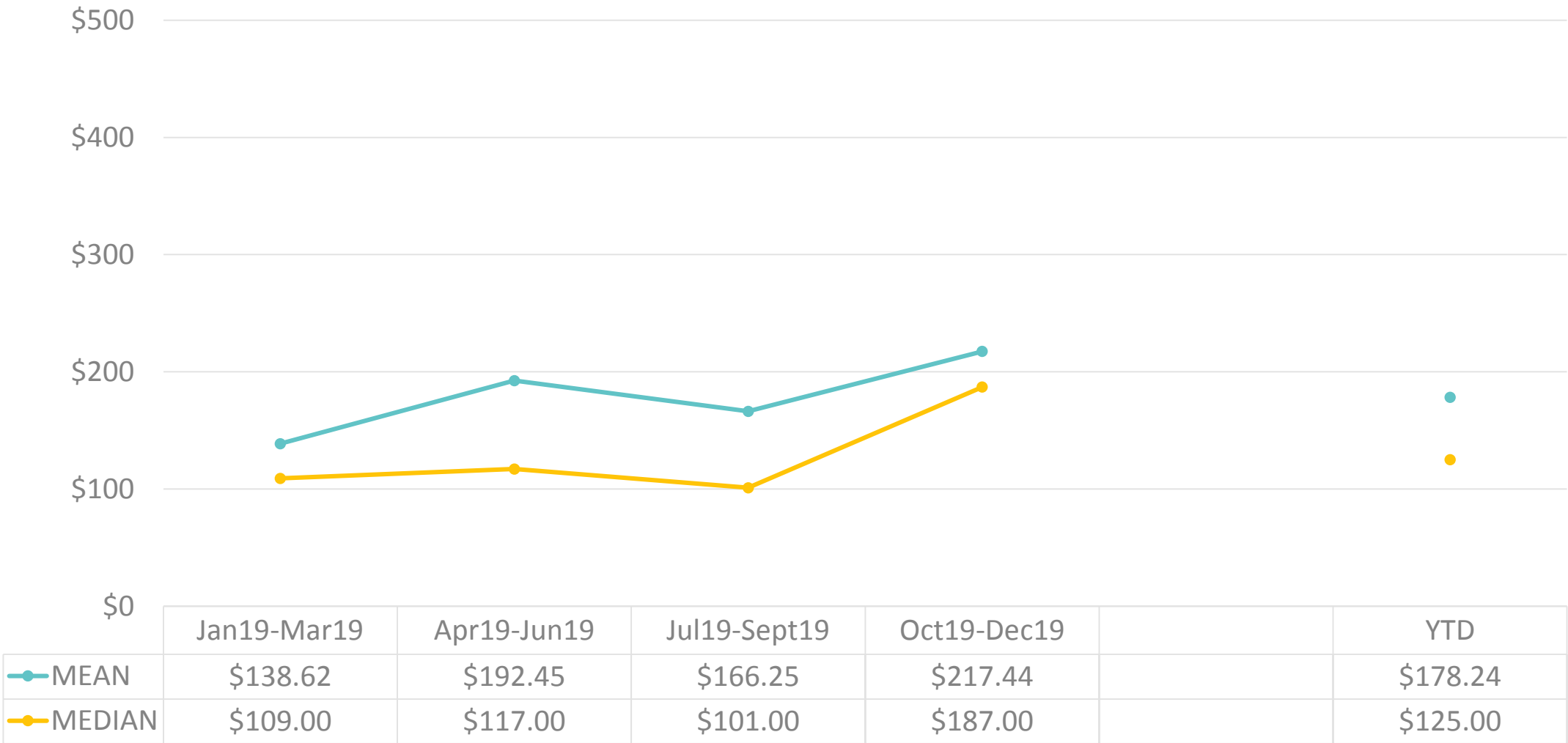


# ONISLE – TRAVEL PARTY/ PER DAY TRACKING

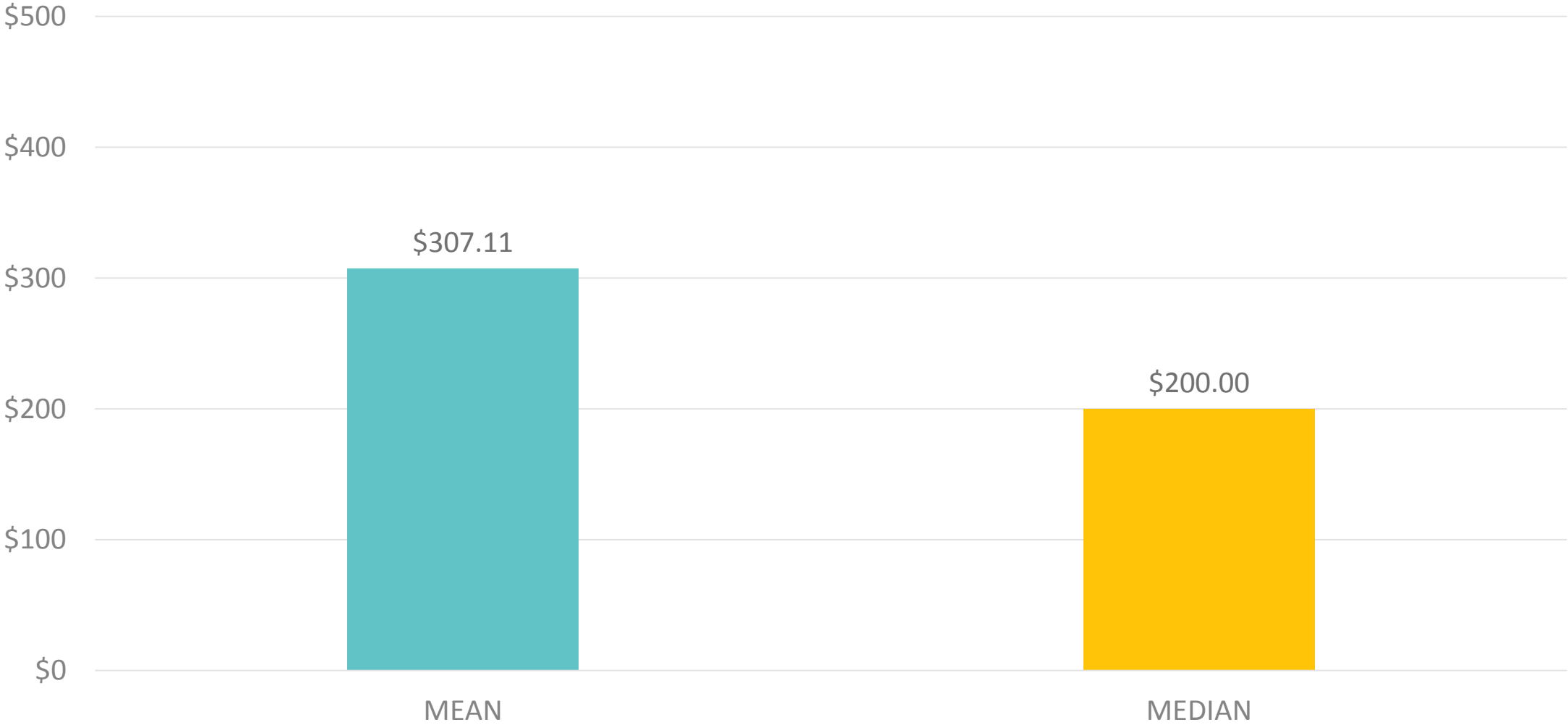


	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
MEAN	\$255.02	\$357.55	\$307.56	\$460.13		\$344.01
MEDIAN	\$202.00	\$200.00	\$210.00	\$371.00		\$237.00

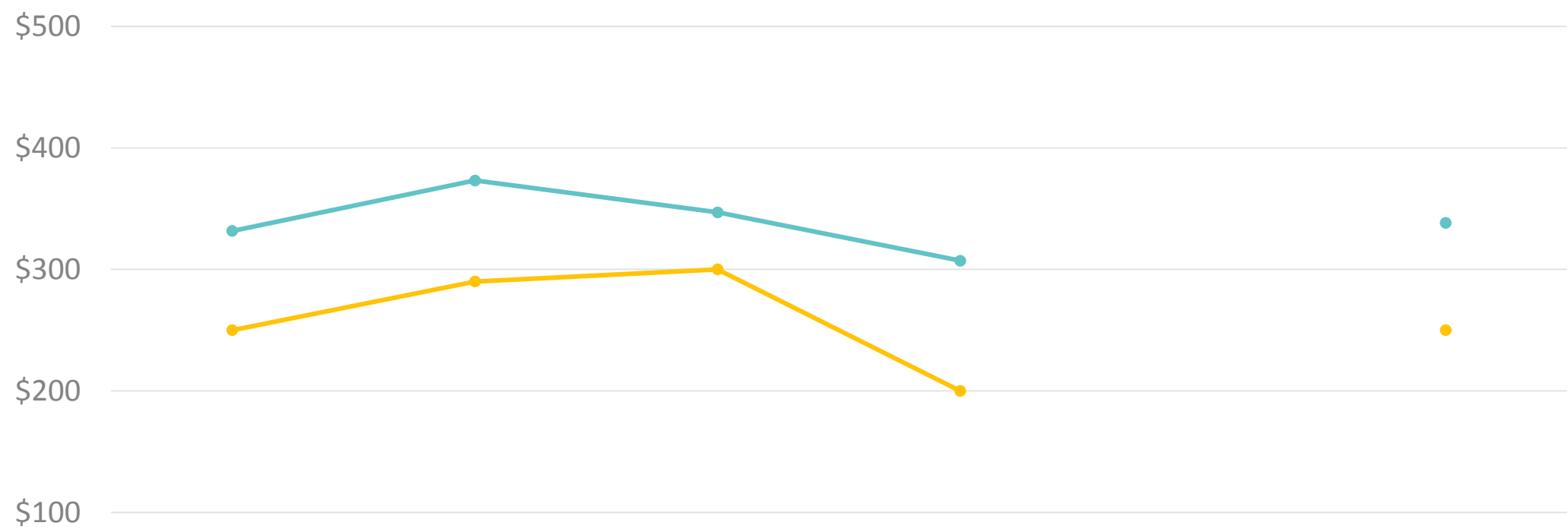
# ONISLE – PER PERSON/ PER DAY TRACKING



# ONISLE – ACCOMMODATIONS

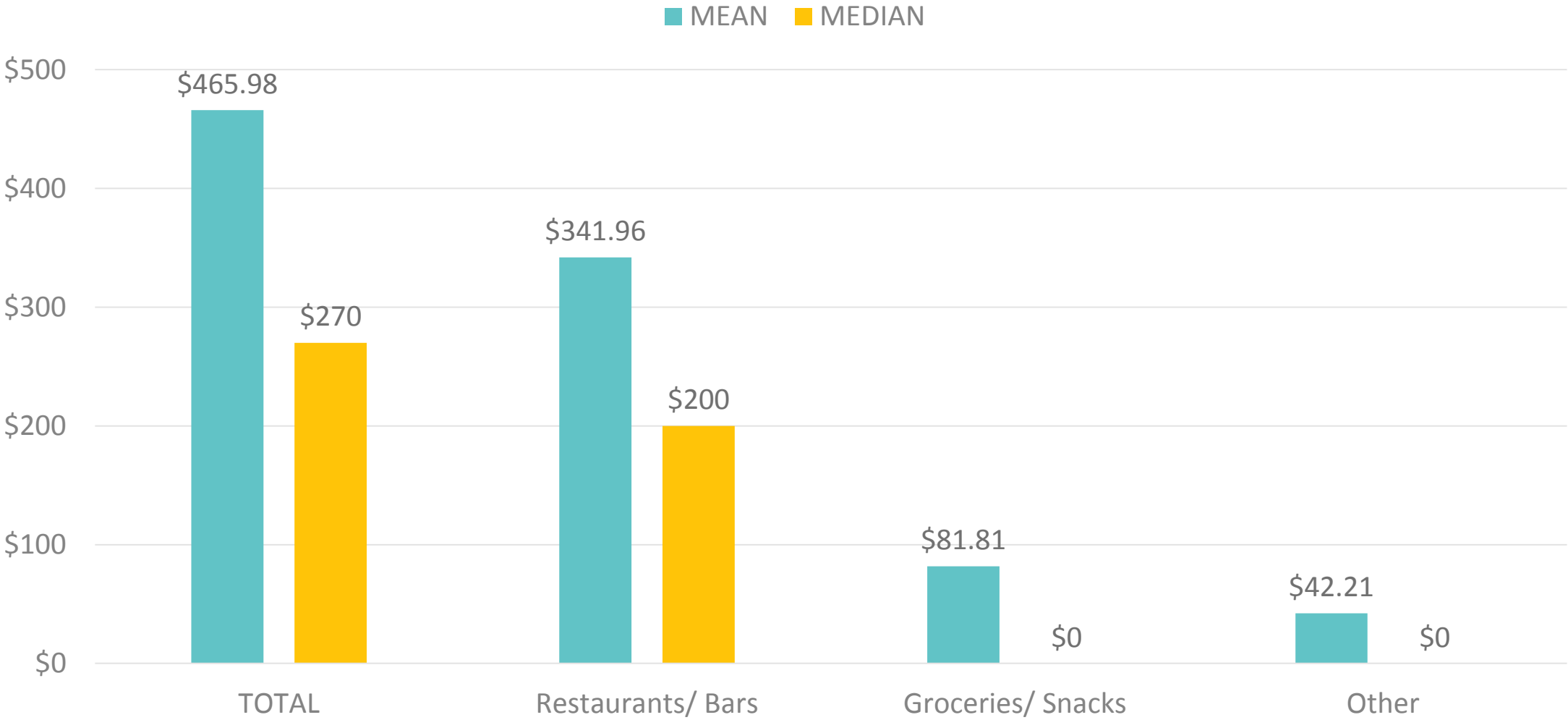


# ONISLE – ACCOMMODATIONS TRACKING

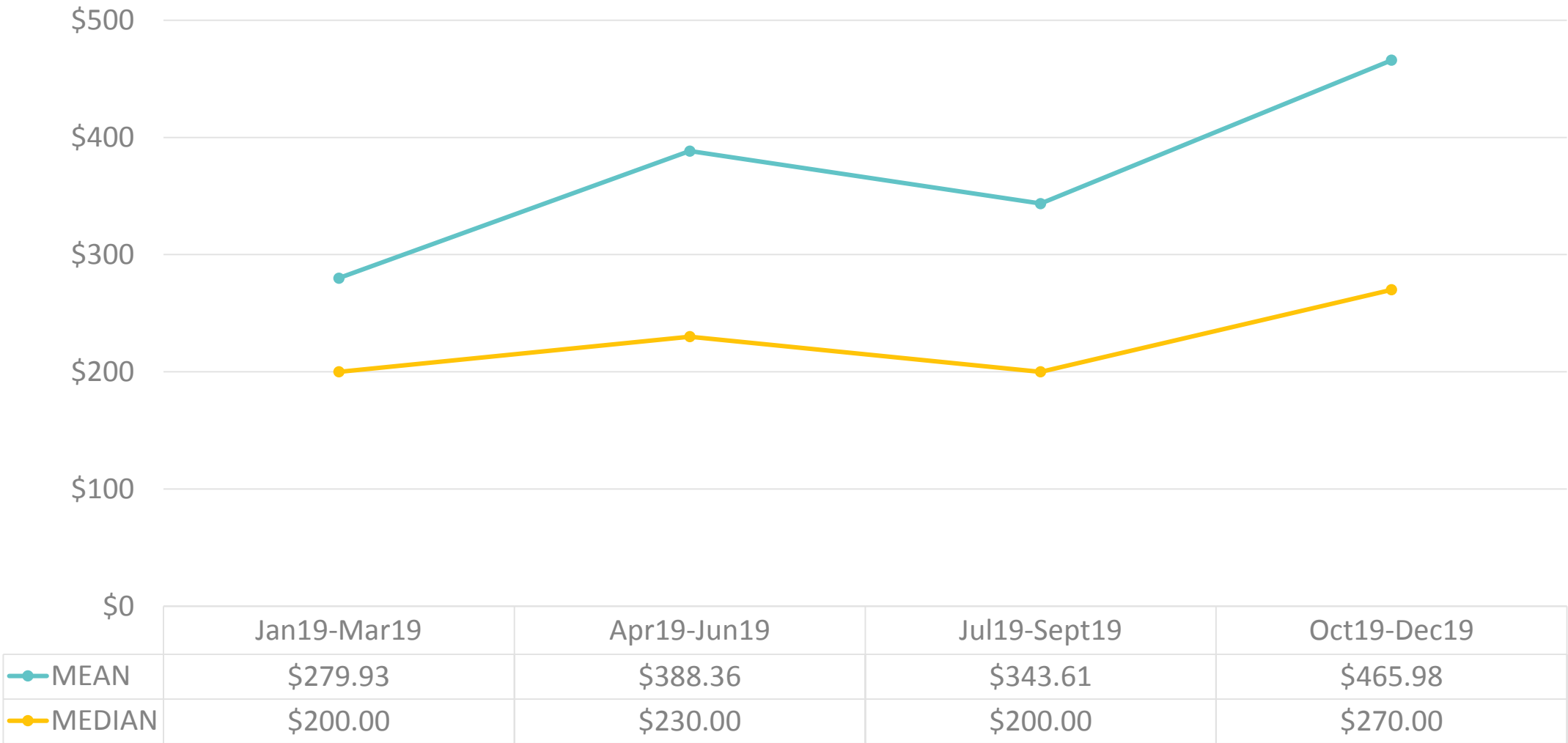


	Jan19-Mar19	Apr19-Jun19	Jul19-Sept19	Oct19-Dec19		YTD
MEAN	\$331.67	\$373.15	\$346.99	\$307.11		\$338.34
MEDIAN	\$250.00	\$290.00	\$300.00	\$200.00		\$250.00

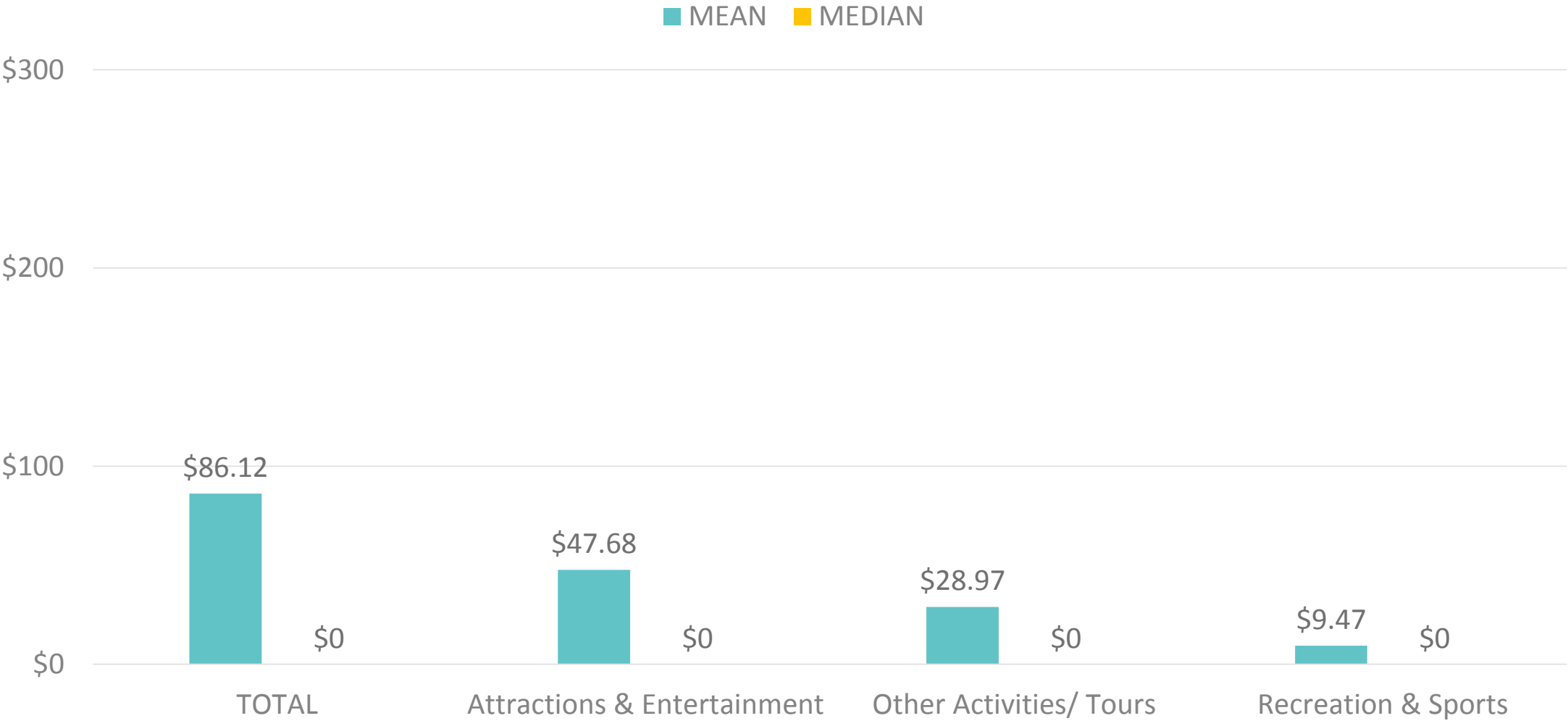
# ONISLE – FOOD & BEVERAGE



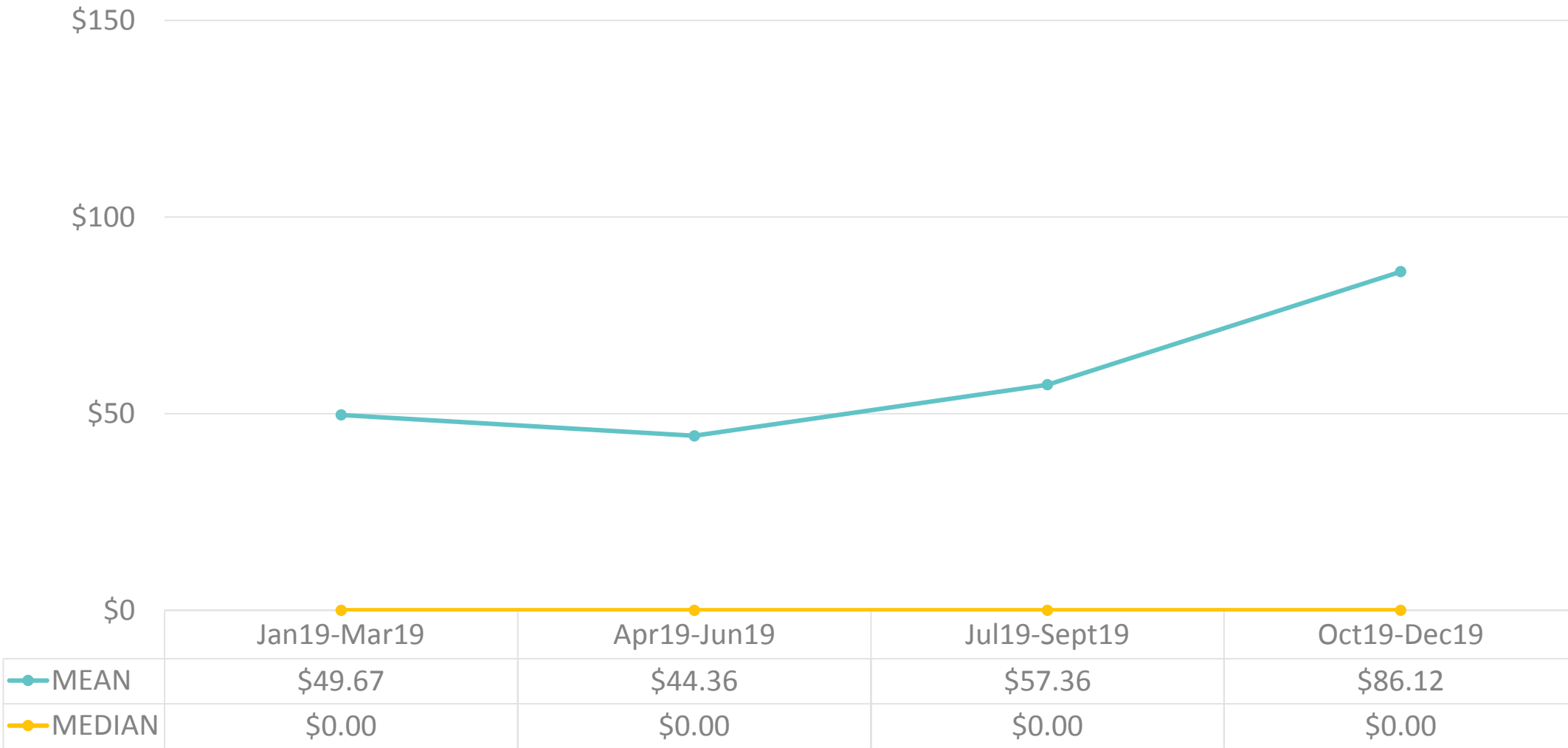
# ONISLE – TOTAL FOOD & BEVERAGE TRACKING



# ONISLE – ENTERTAINMENT & RECREATION

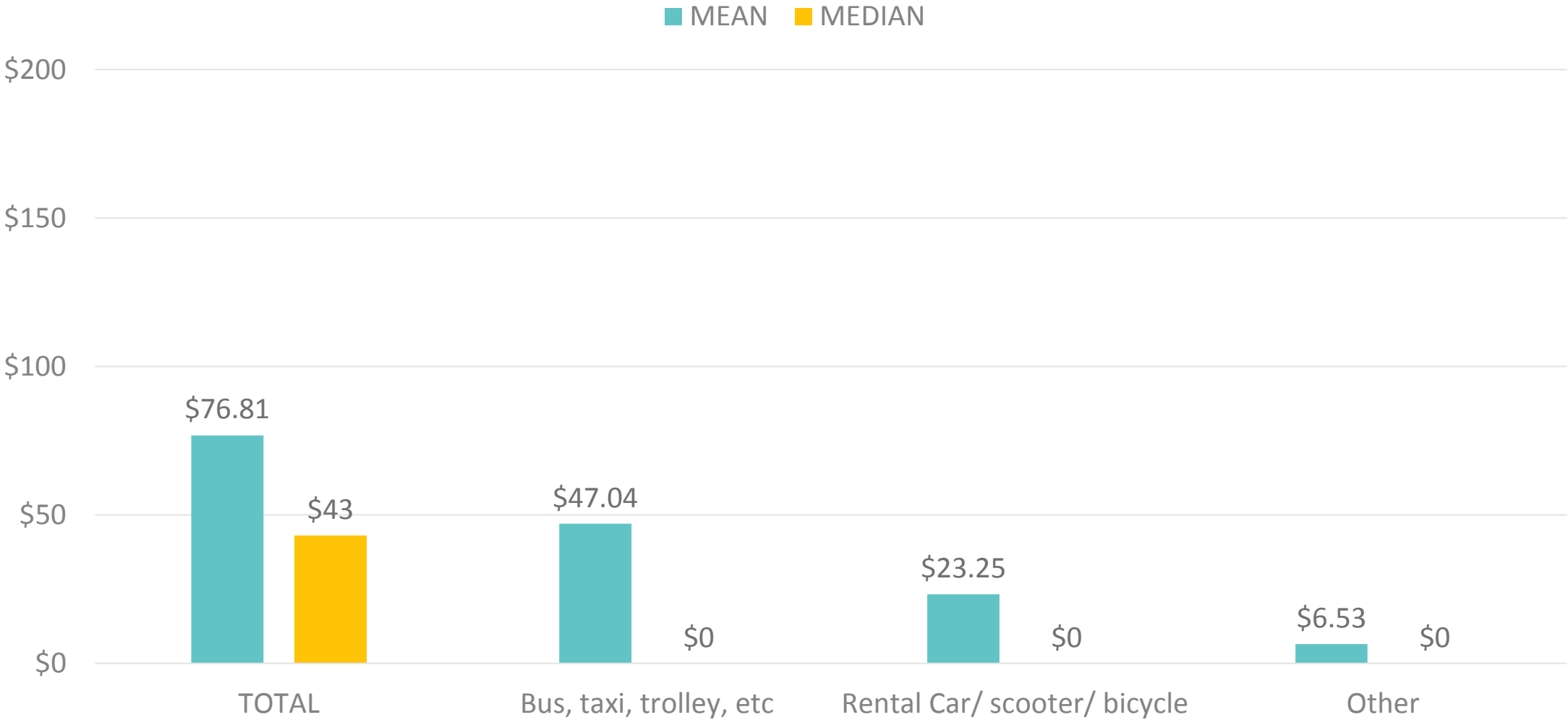


# ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING

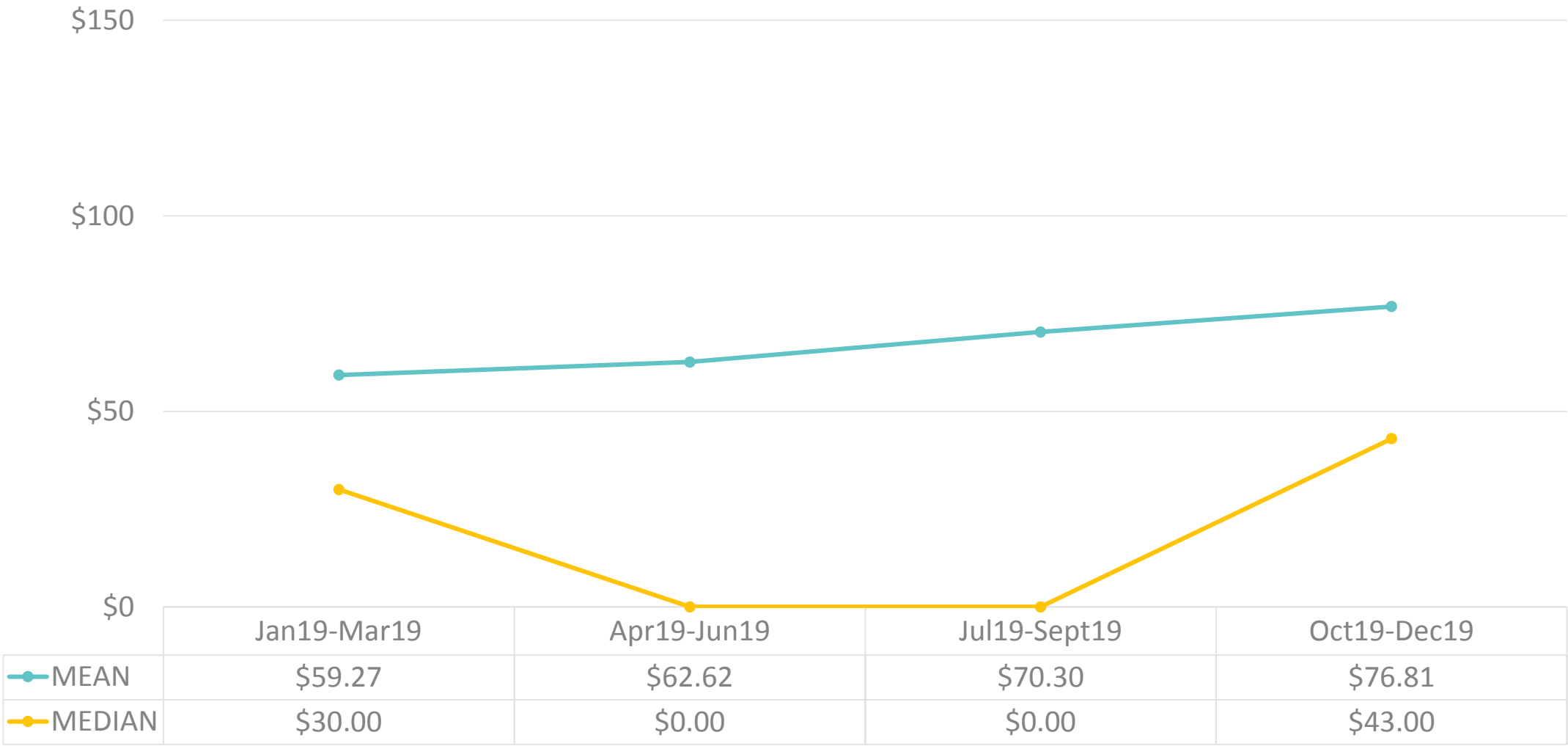




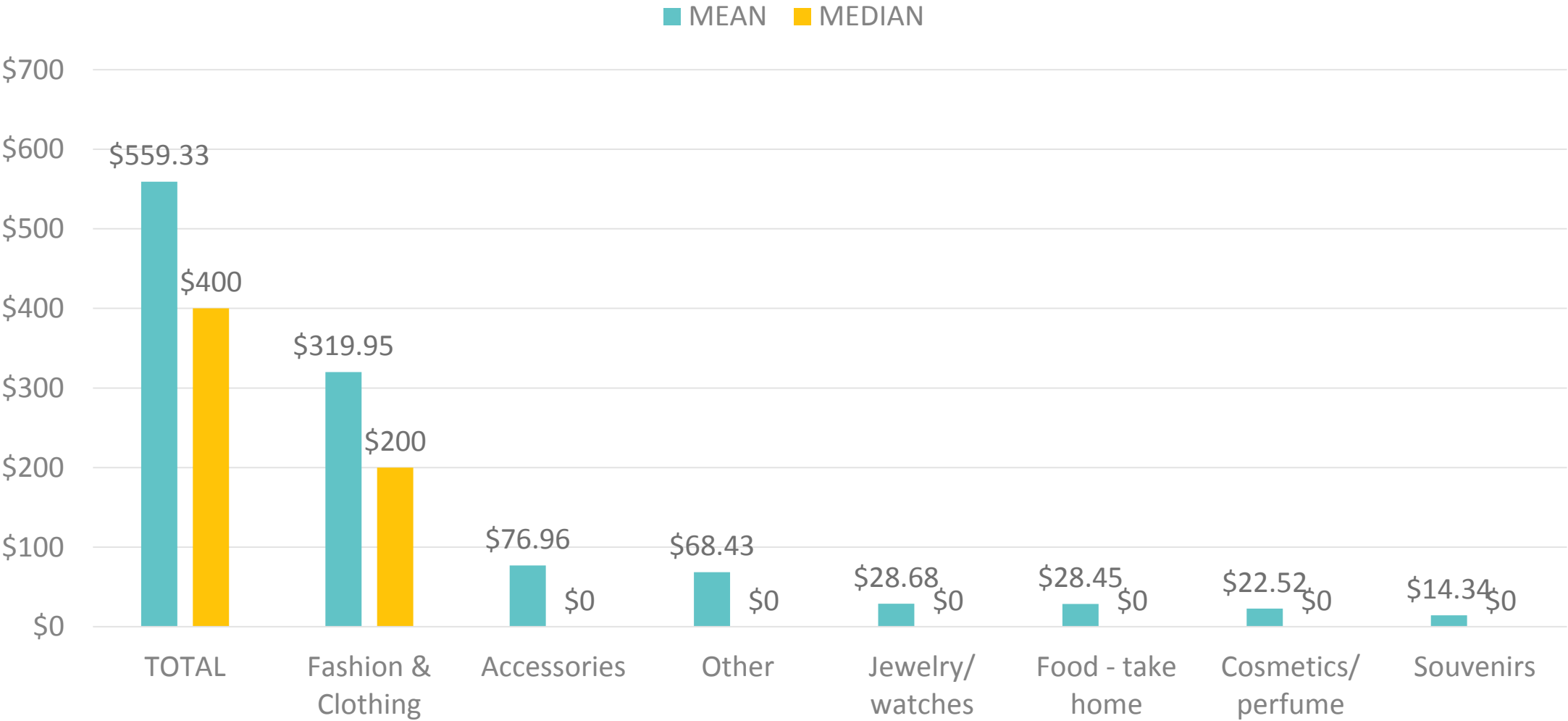
# ONISLE – TRANSPORTATION



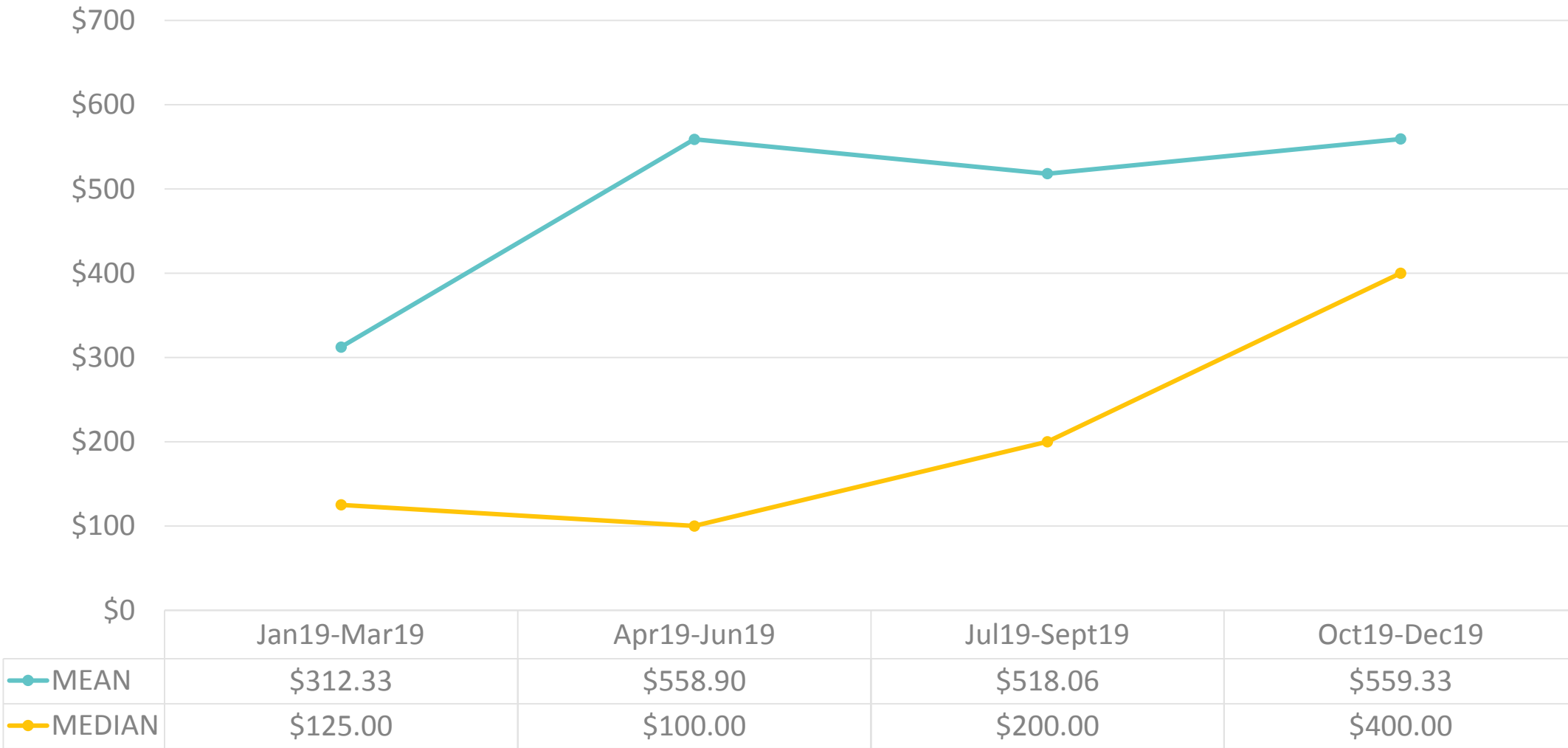
# ONISLE – TOTAL TRANSPORTATION TRACKING



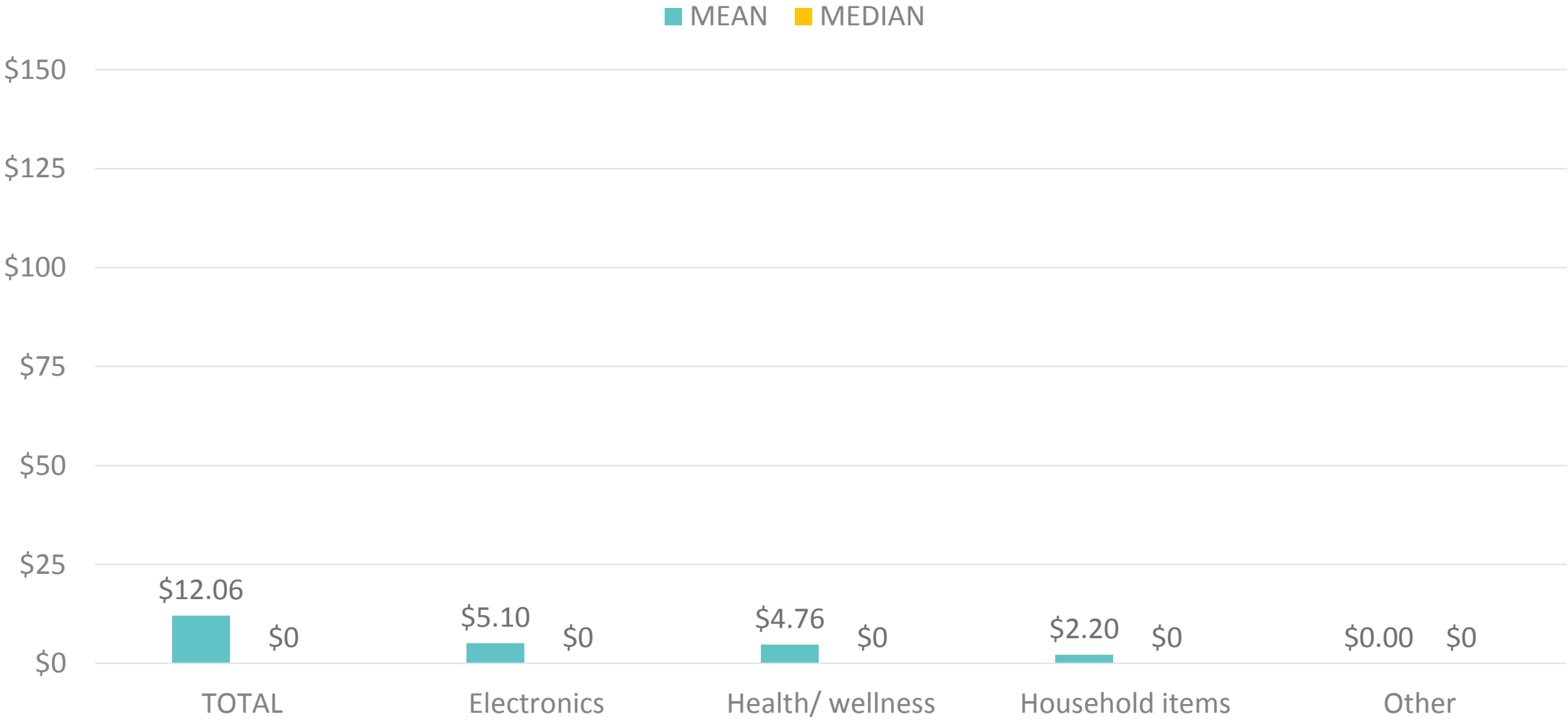
# ONISLE – SHOPPING



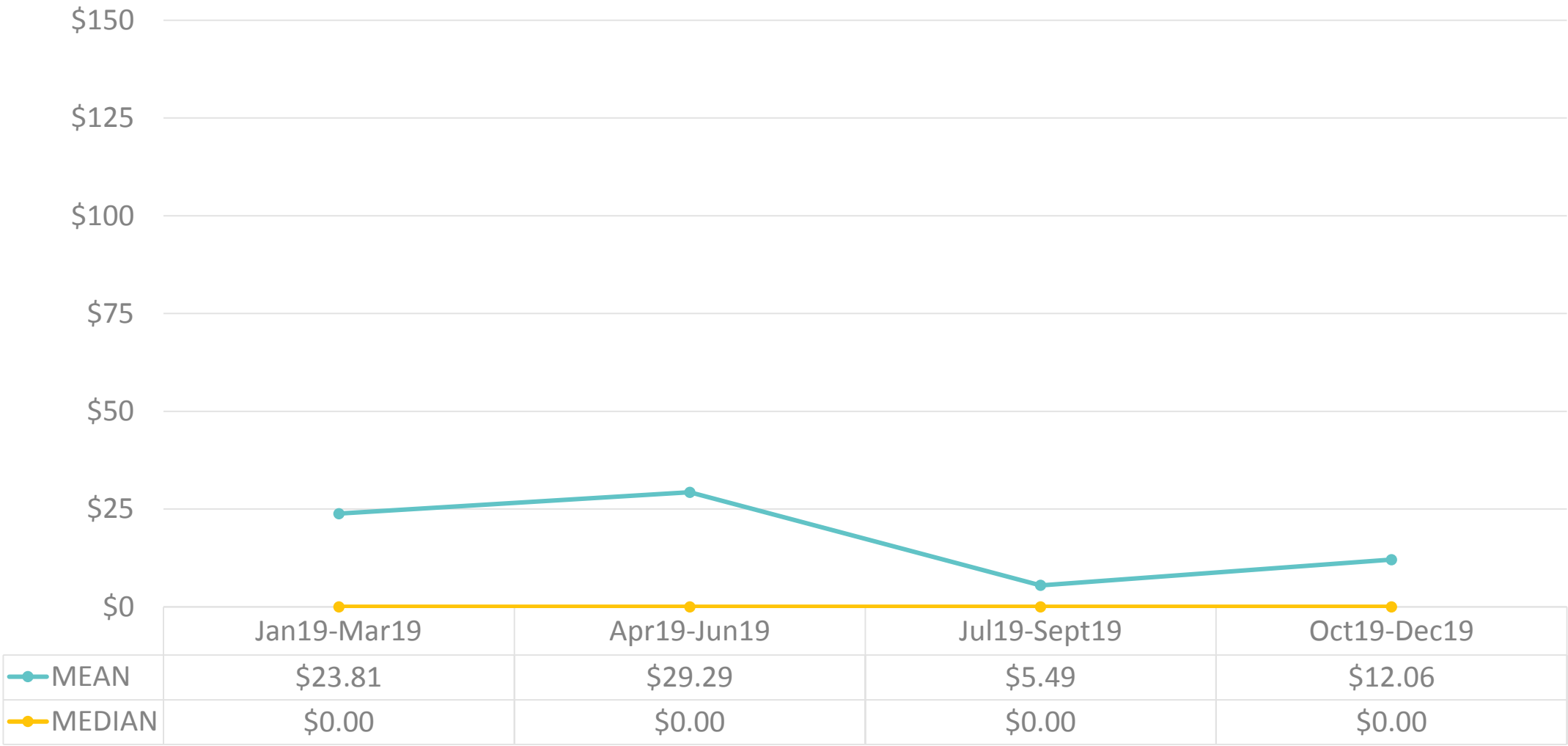
# ONISLE – TOTAL SHOPPING TRACKING



# ONISLE – MISCELLANEOUS



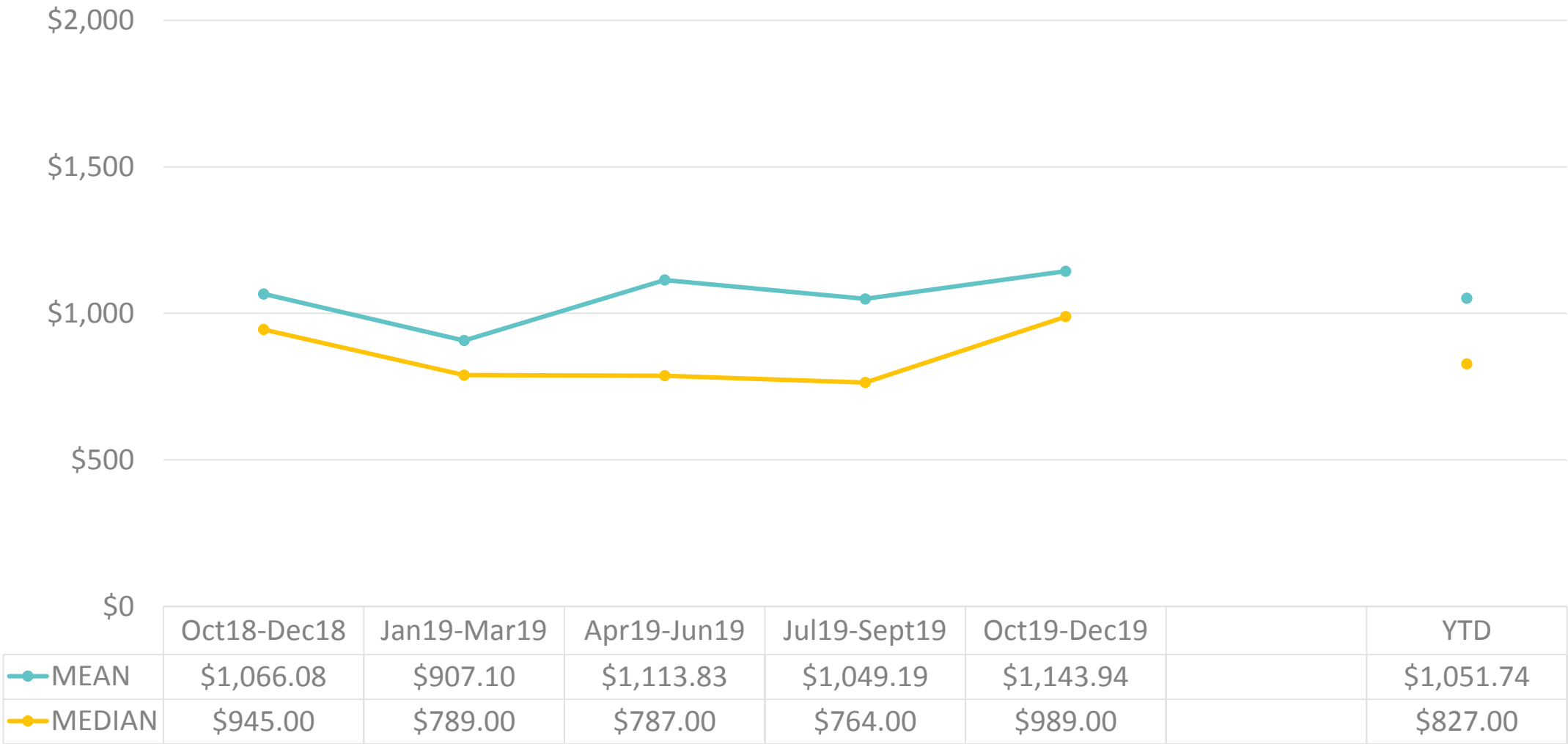
# ONISLE – MISCELLANEOUS TRACKING



# TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

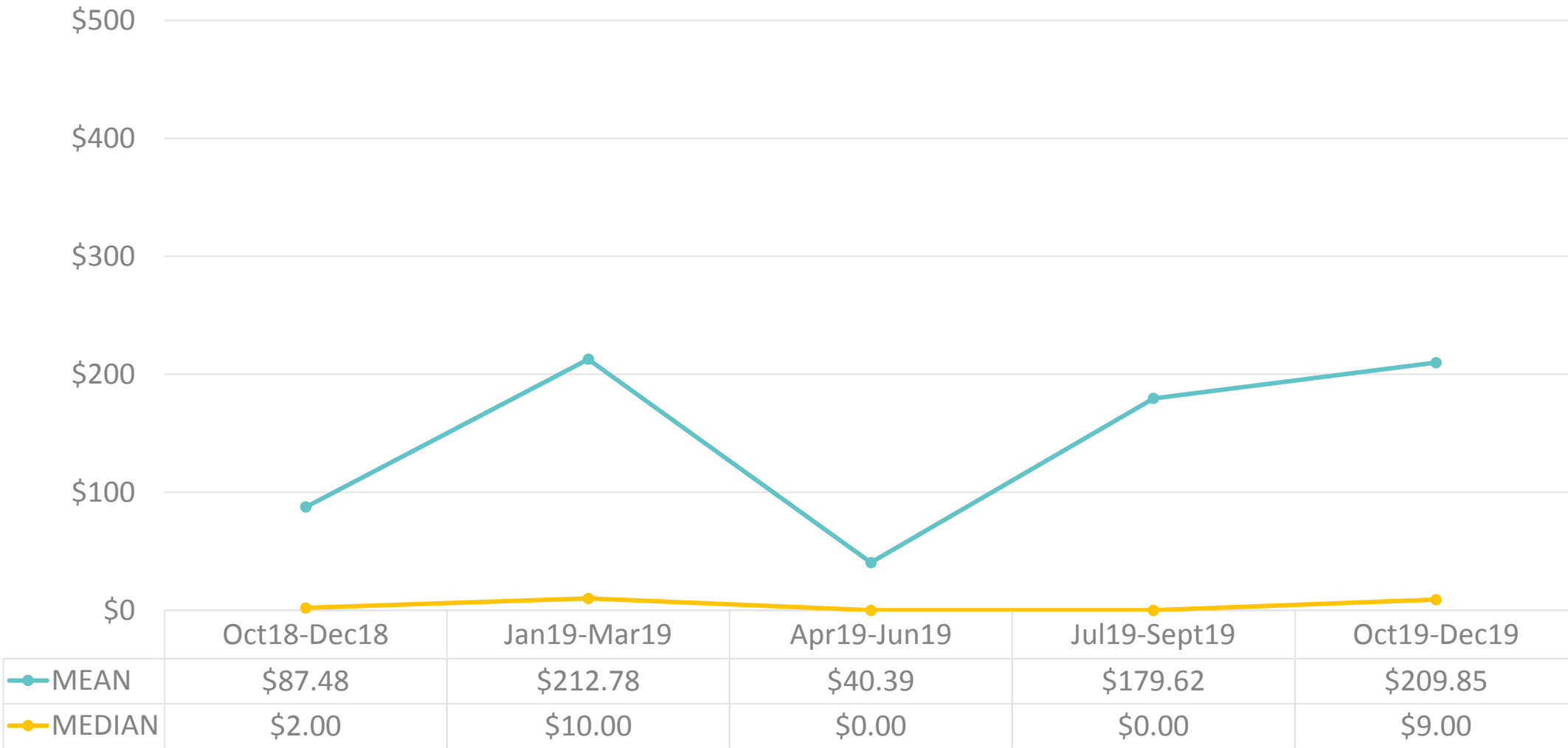
- \$1,143.94 = Mean average per person
- \$989.00 = Median amount spent per person

# TOTAL EXPENDITURES PER PERSON TRACKING





# GUAM AIRPORT EXPENDITURE TRACKING



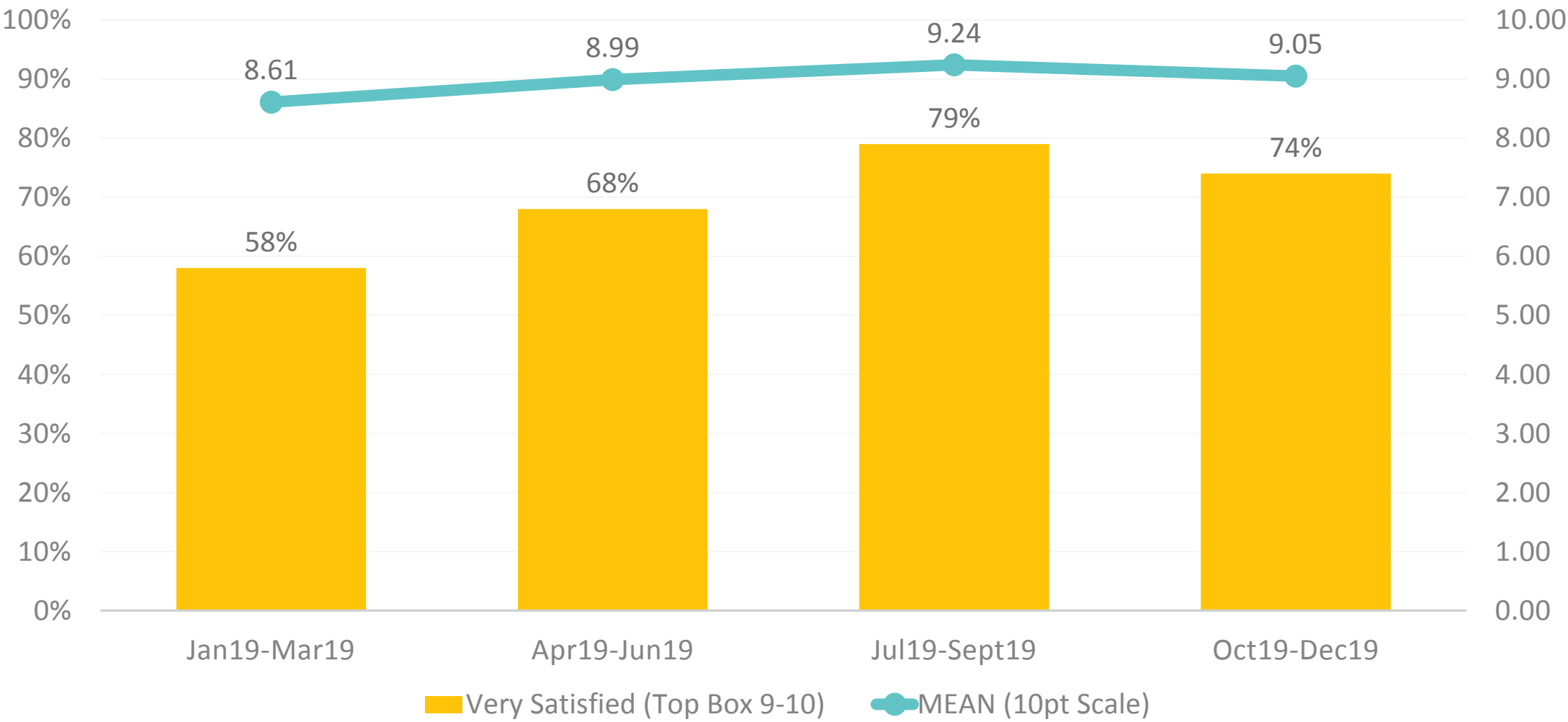


SECTION 4

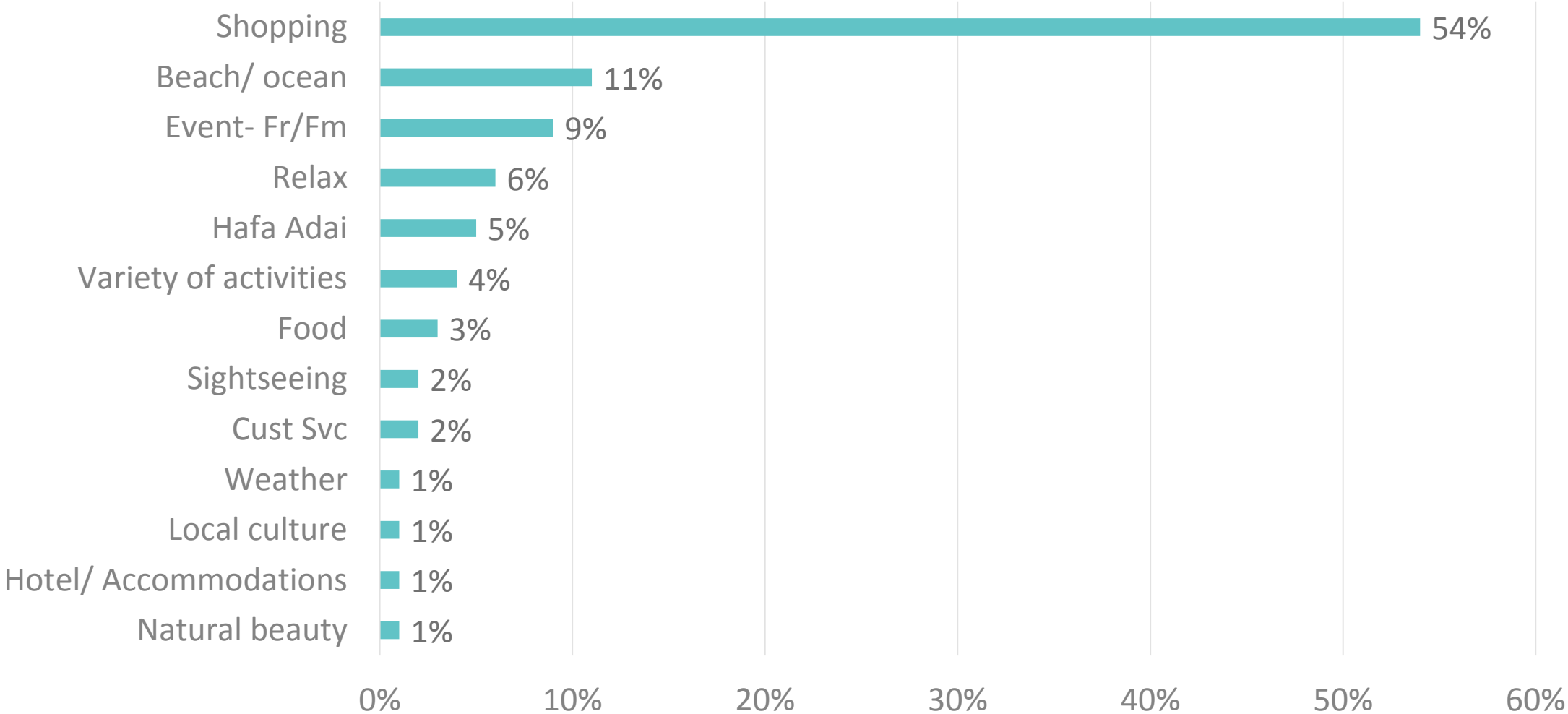
# VISITOR SATISFACTION



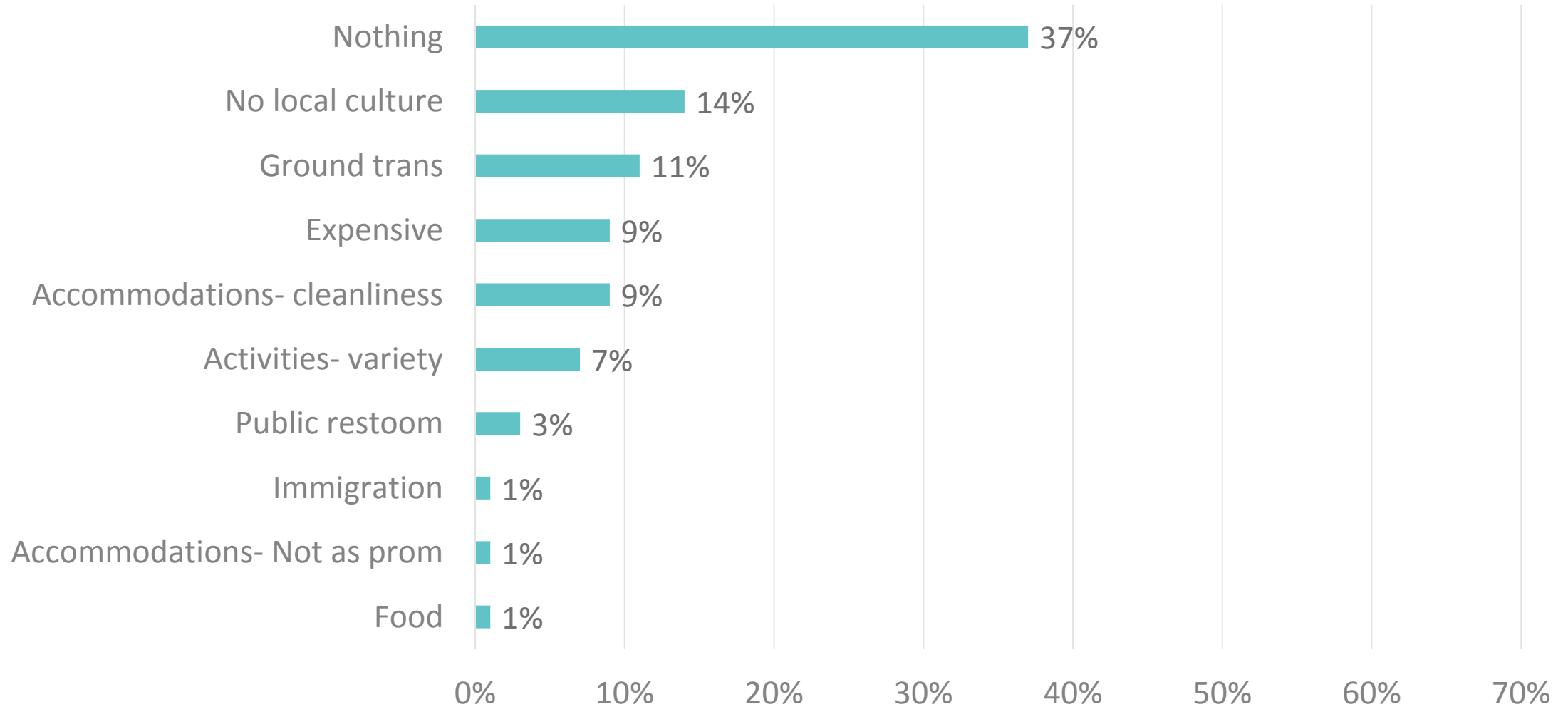
# OVERALL SATISFACTION – 10PT SCALE



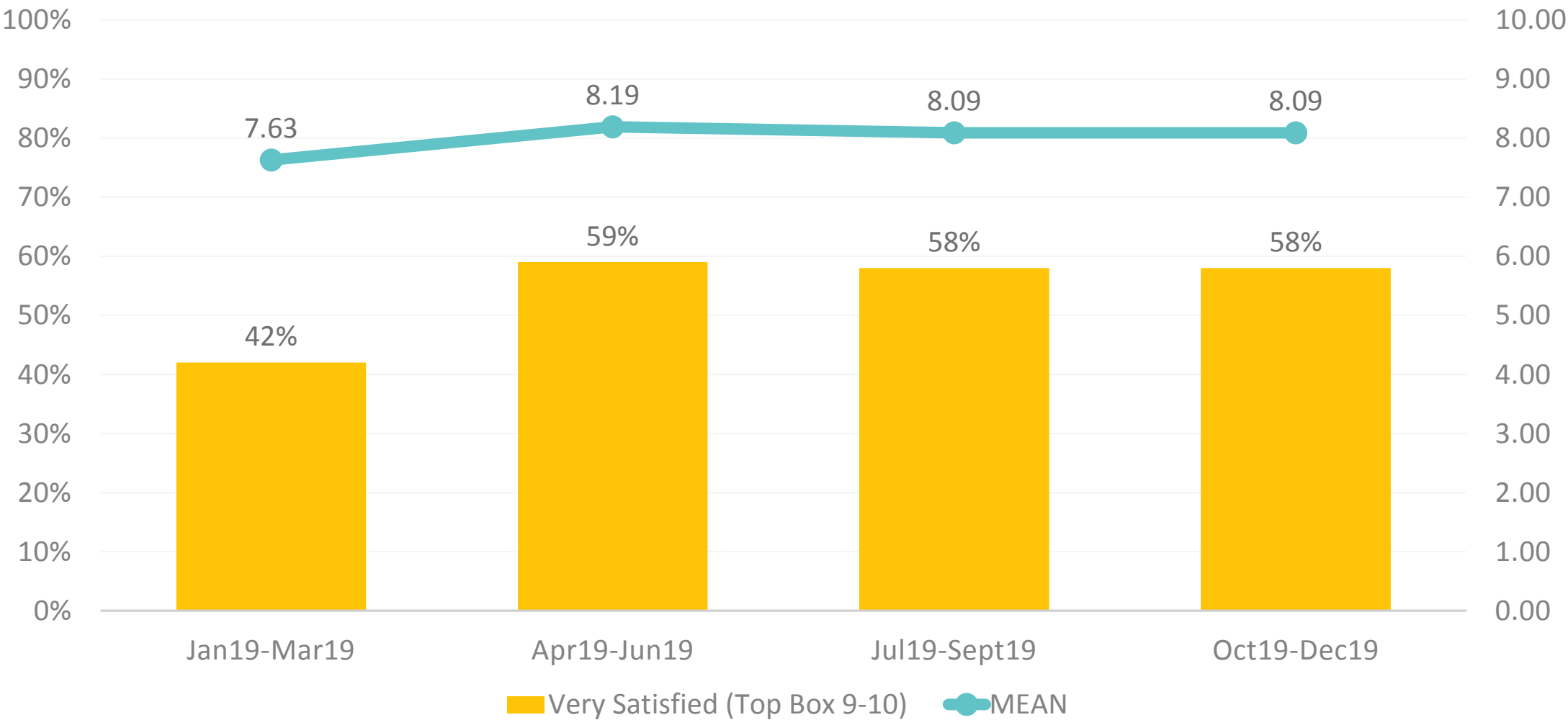
# SWOT – POSITIVE ASPECT OF TRIP



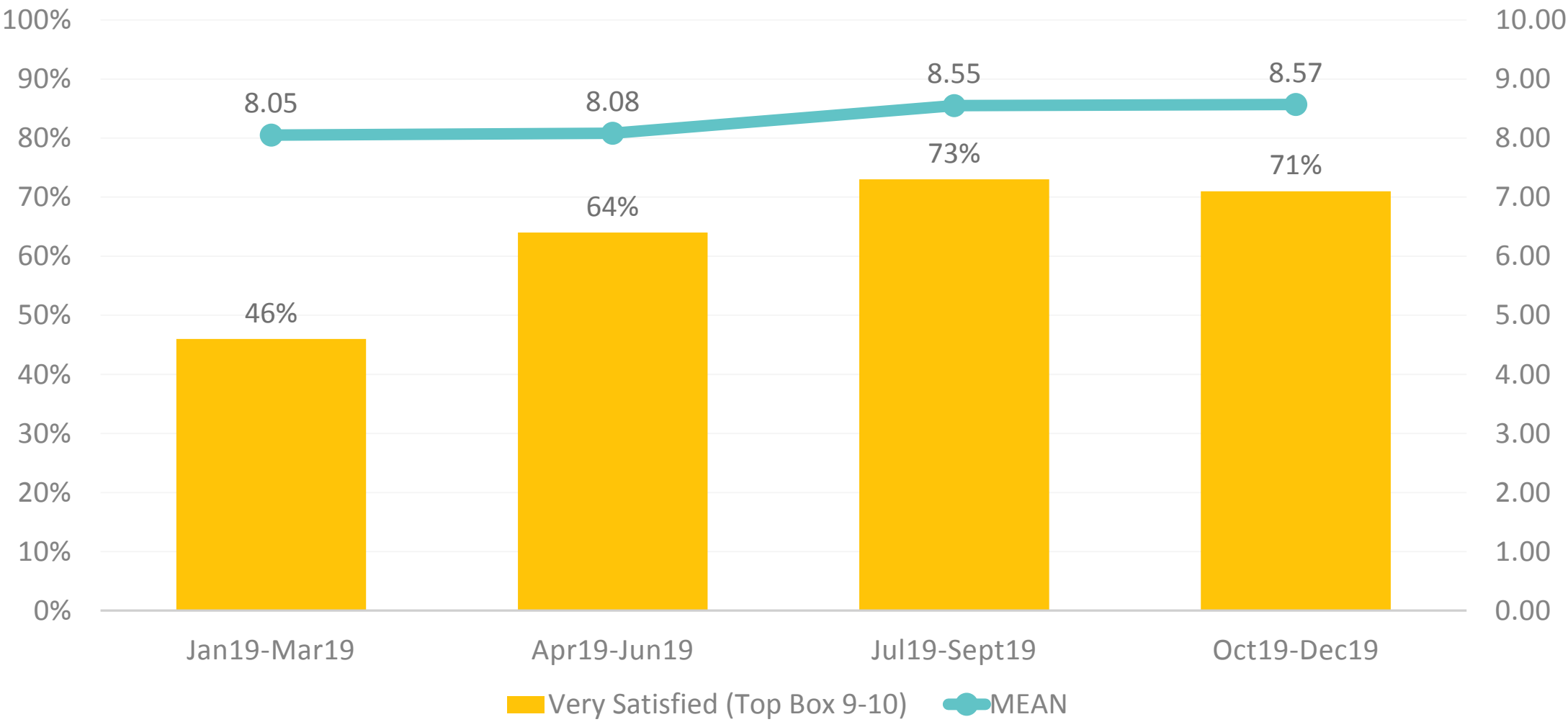
# SWOT – NEGATIVE ASPECT OF TRIP



# SATISFACTION – ENTERTAINMENT

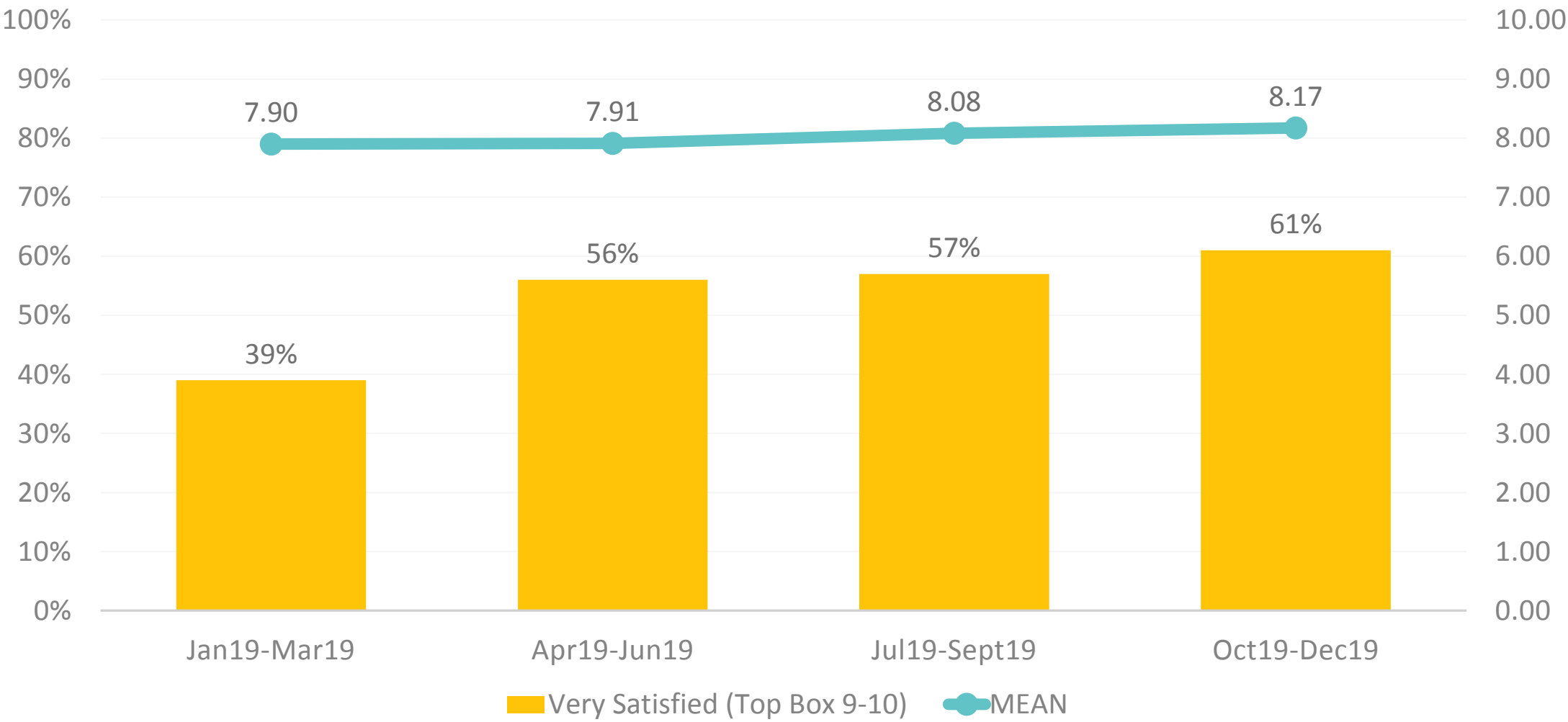


# SATISFACTION – SHOPPING



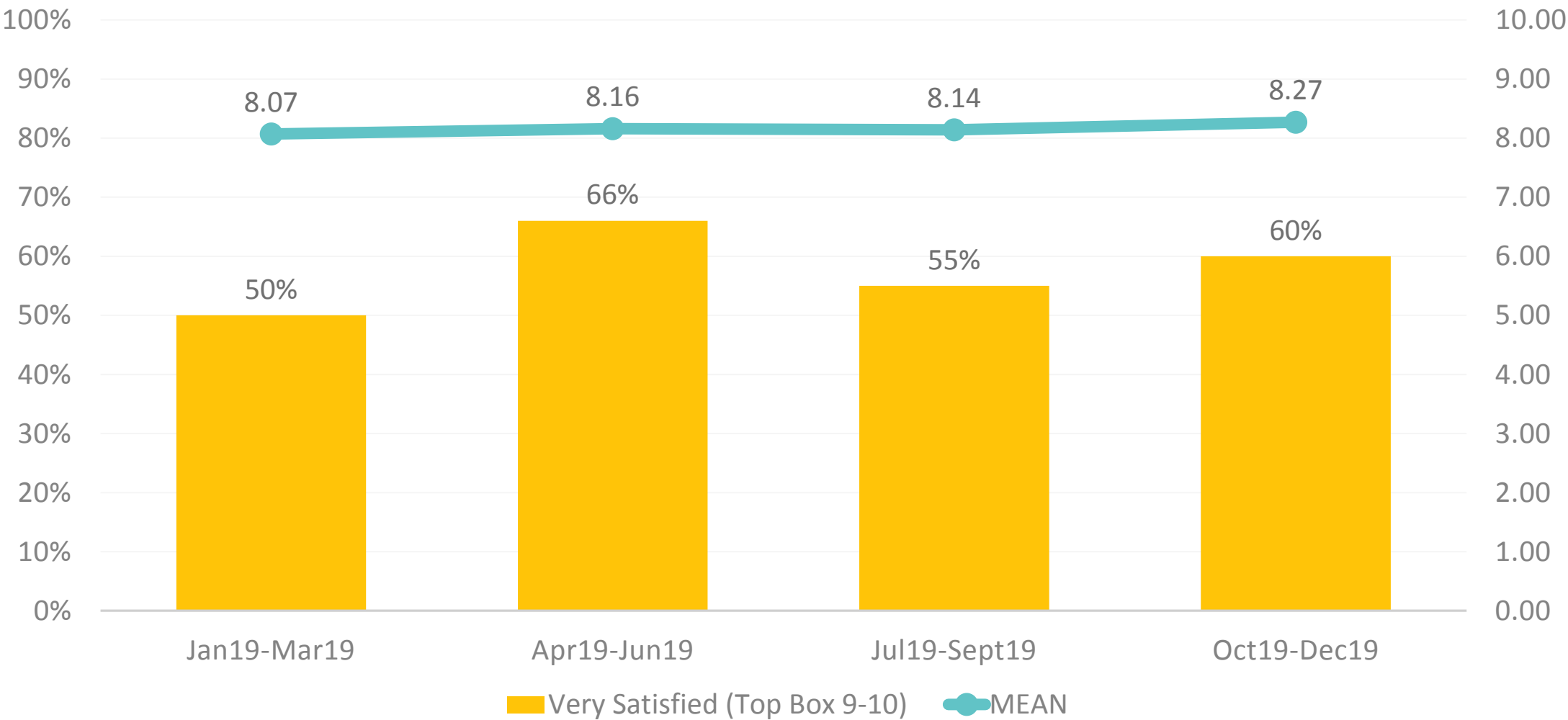


# SATISFACTION – DINING

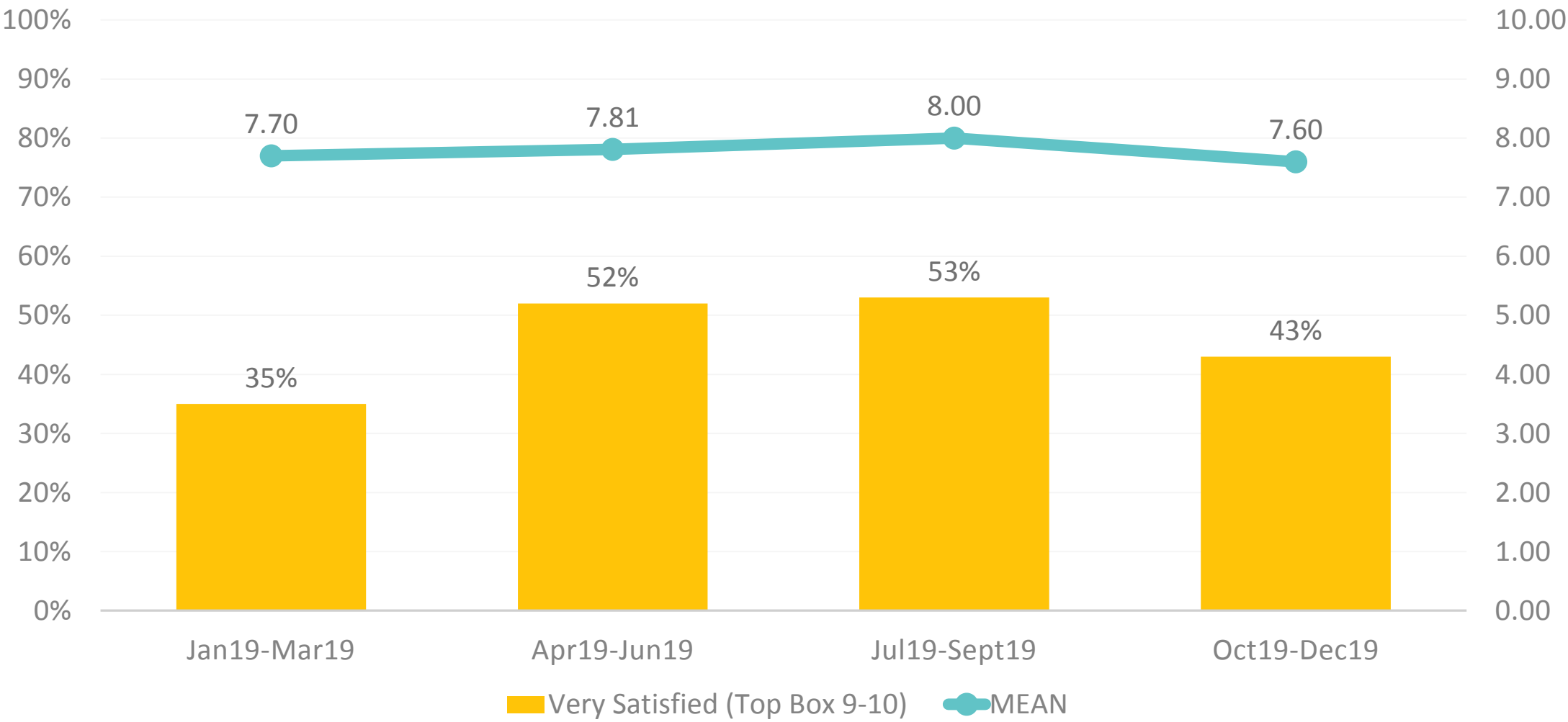




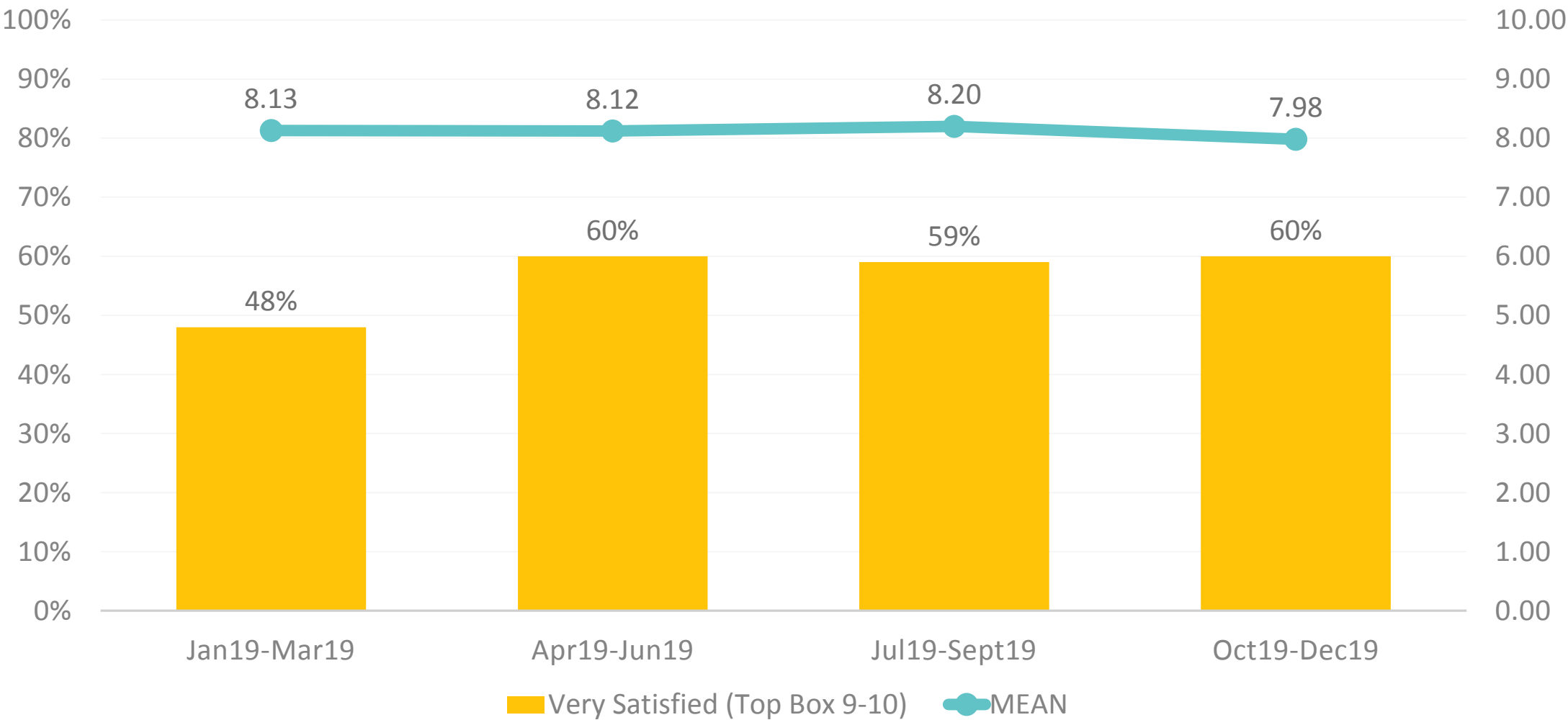
# SATISFACTION – BEACHES



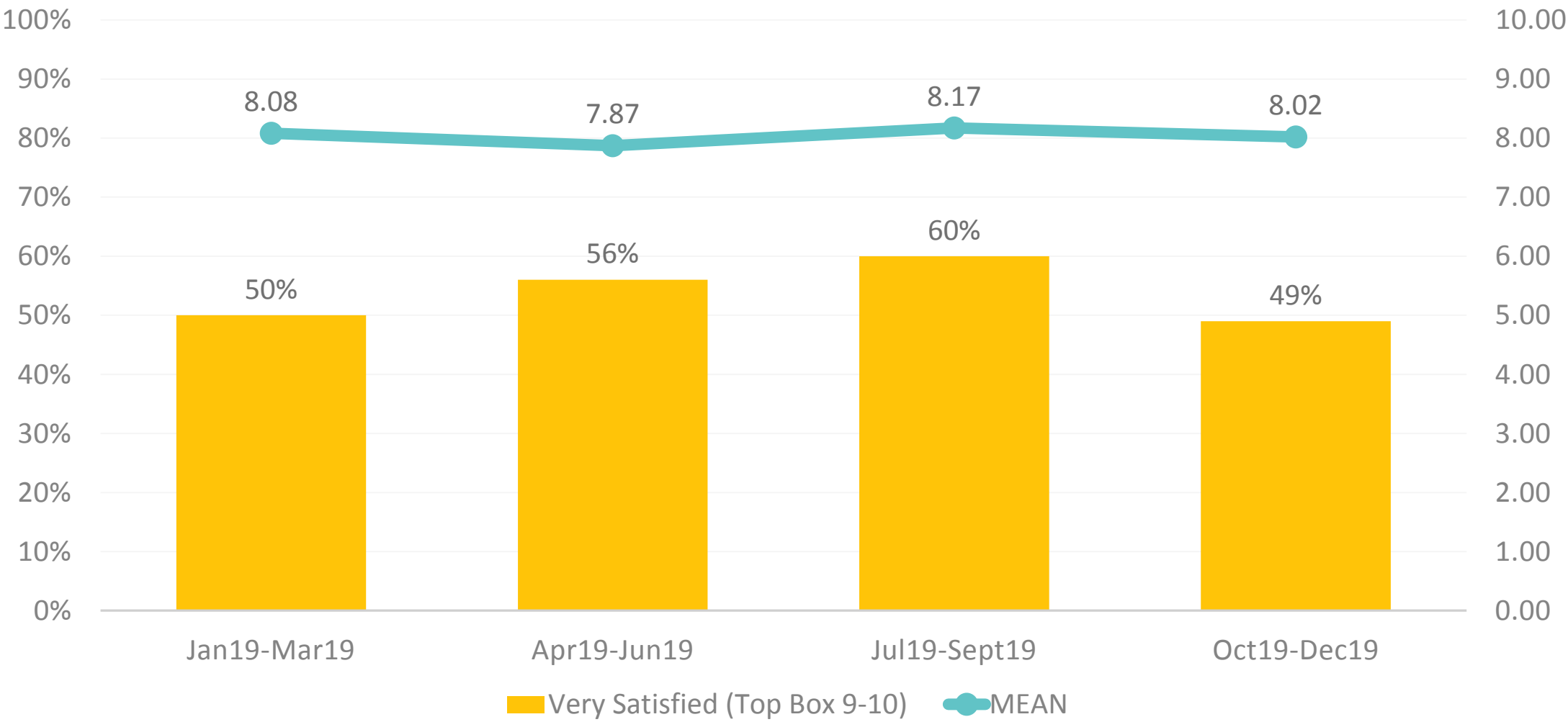
# SATISFACTION – PARKS



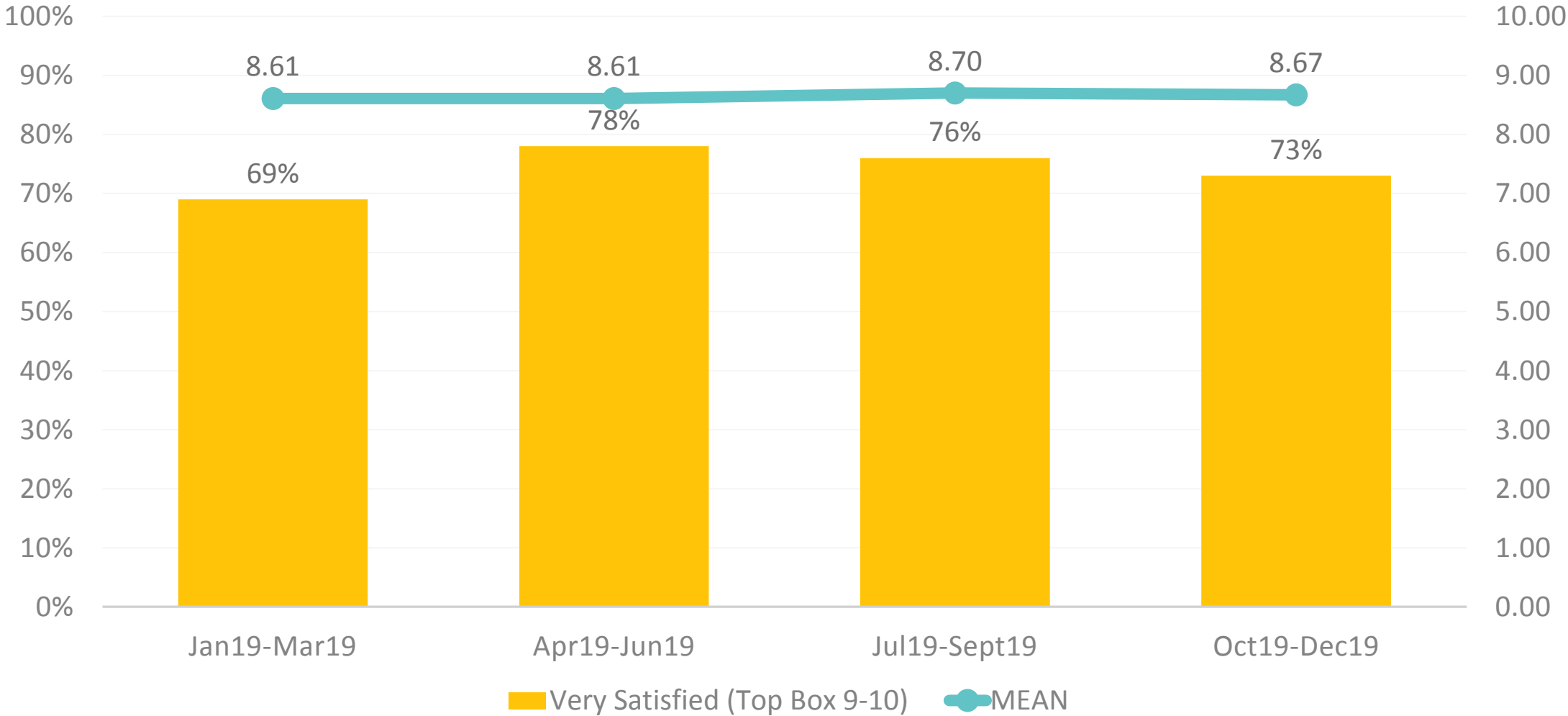
# SATISFACTION – ROADS



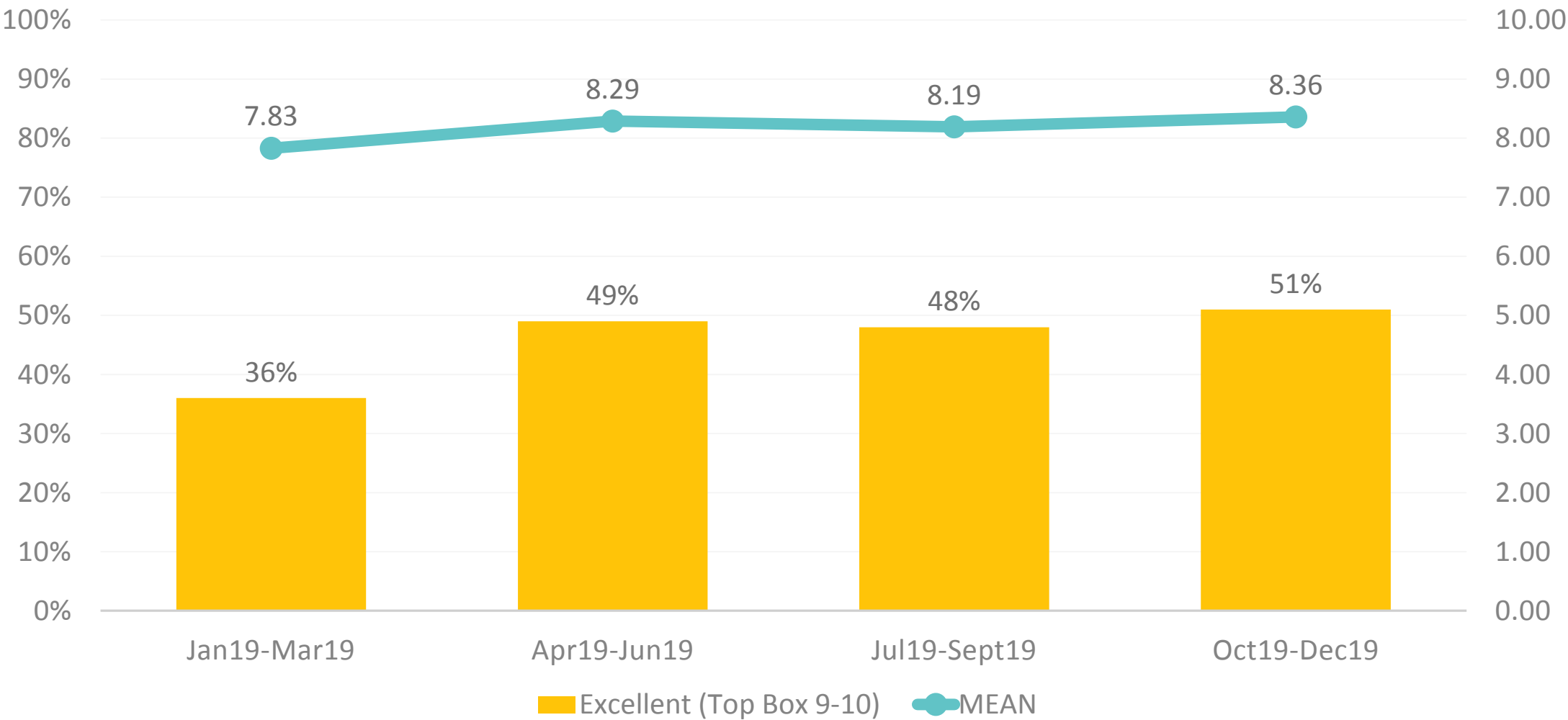
# SATISFACTION – SIGHTSEEING AREAS



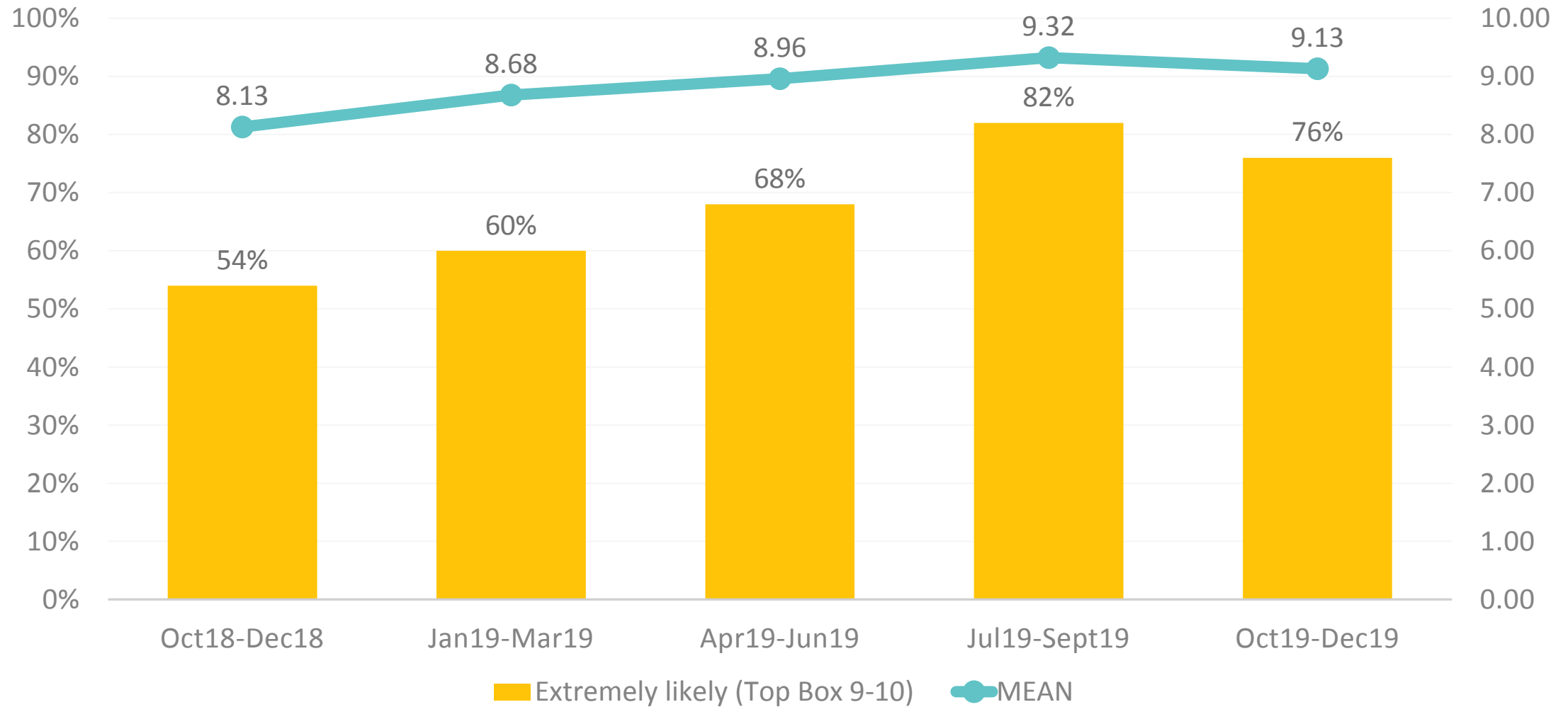
# SATISFACTION – SAFETY & SECURITY



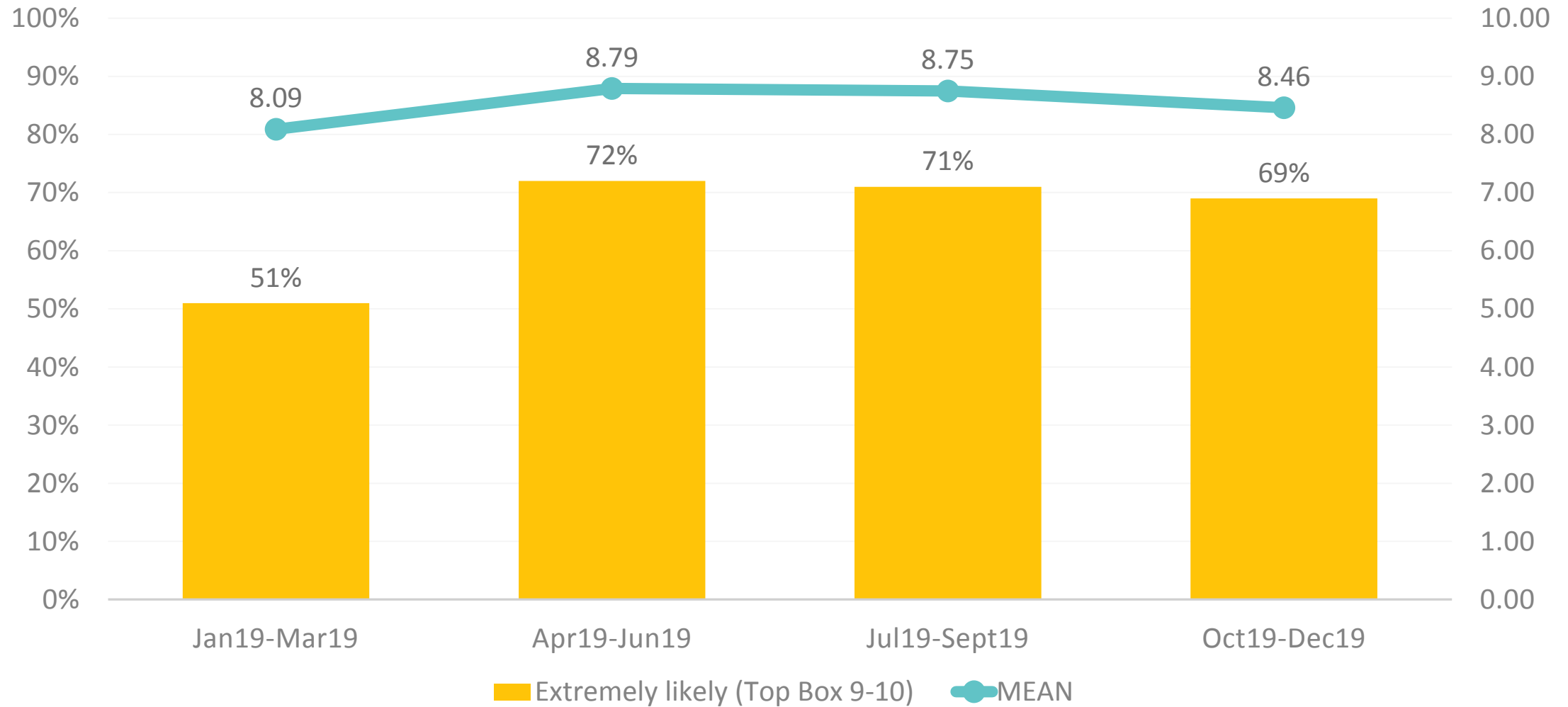
# SATISFACTION – ACCOMMODATIONS



# BRAND ADVOCACY

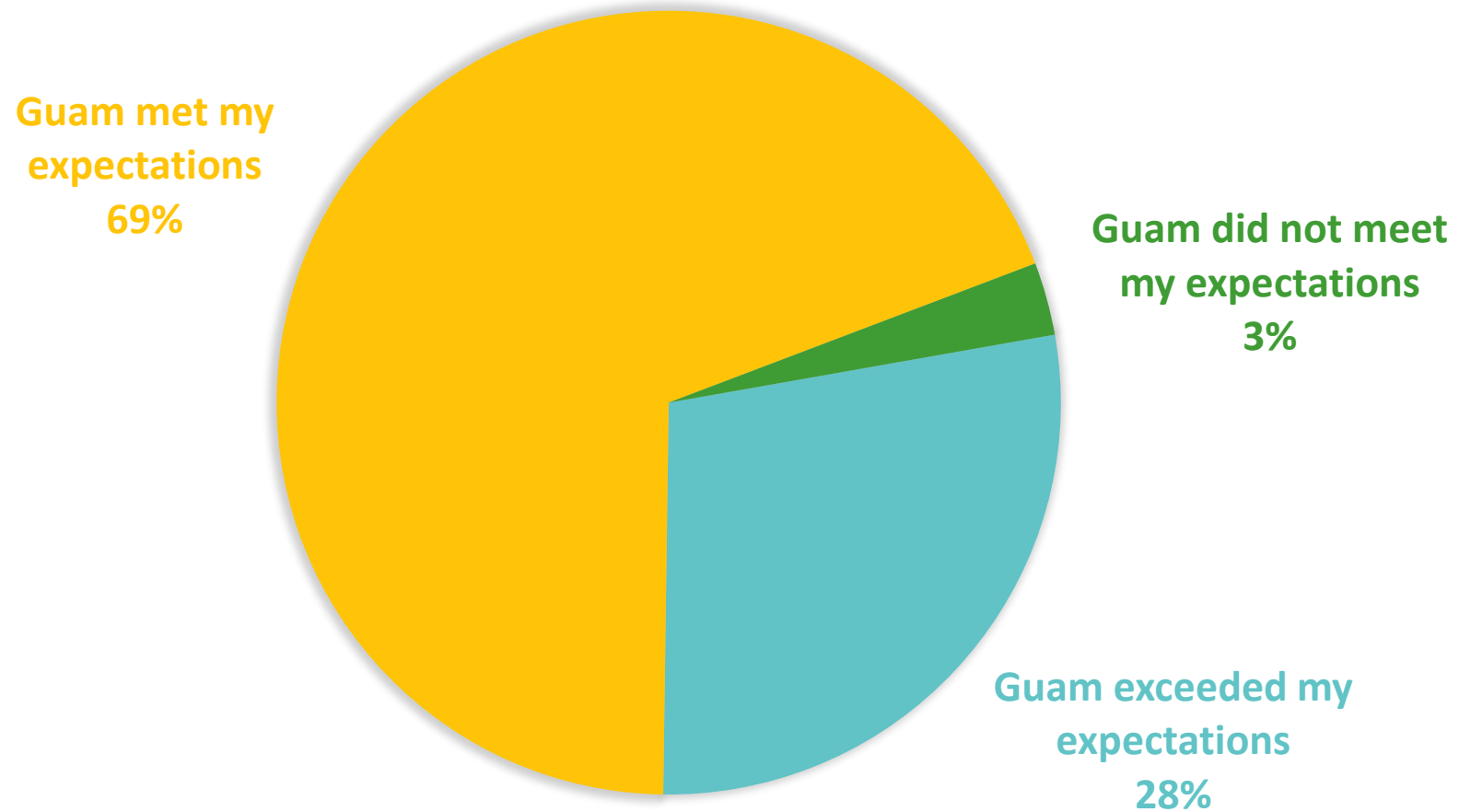


# BRAND LOYALTY

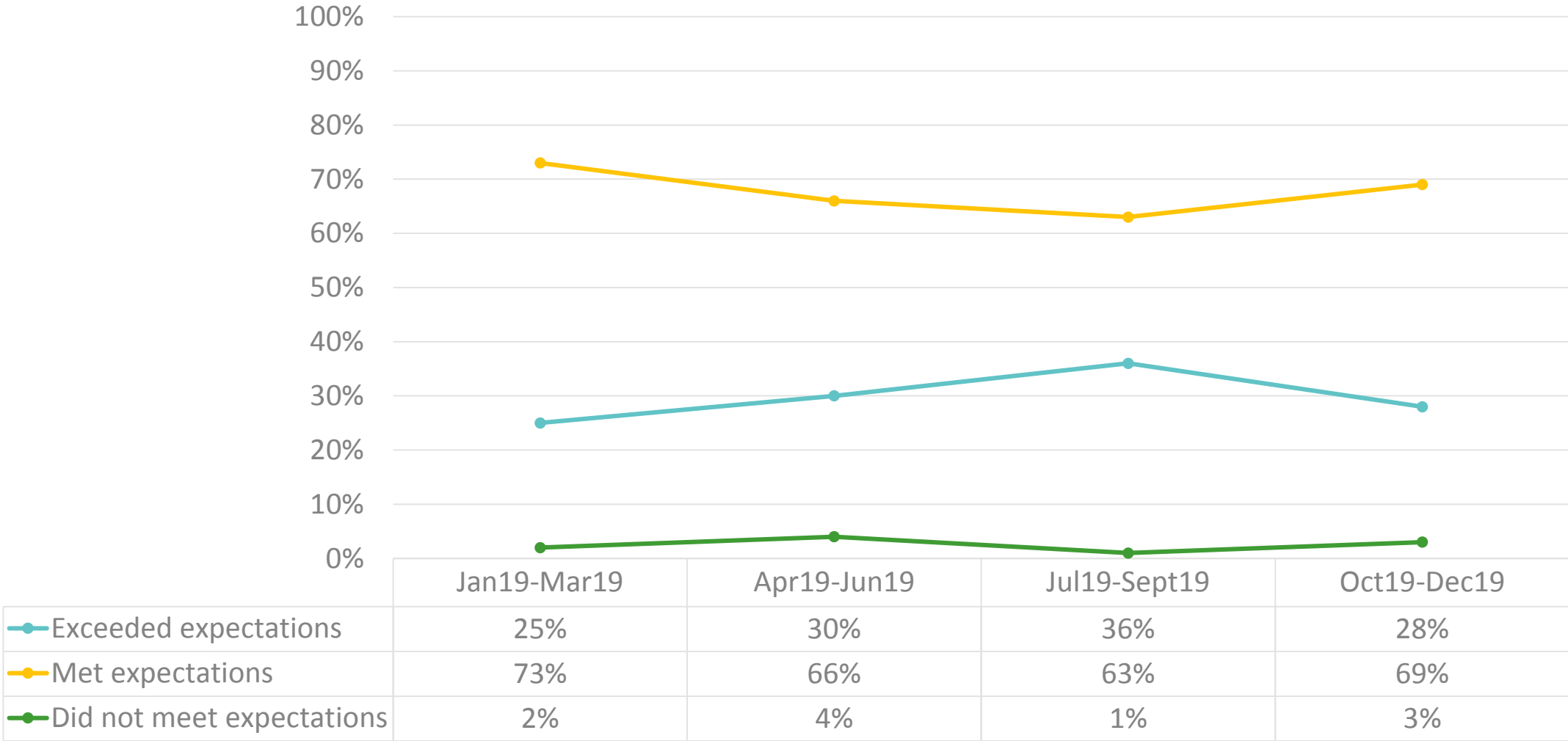


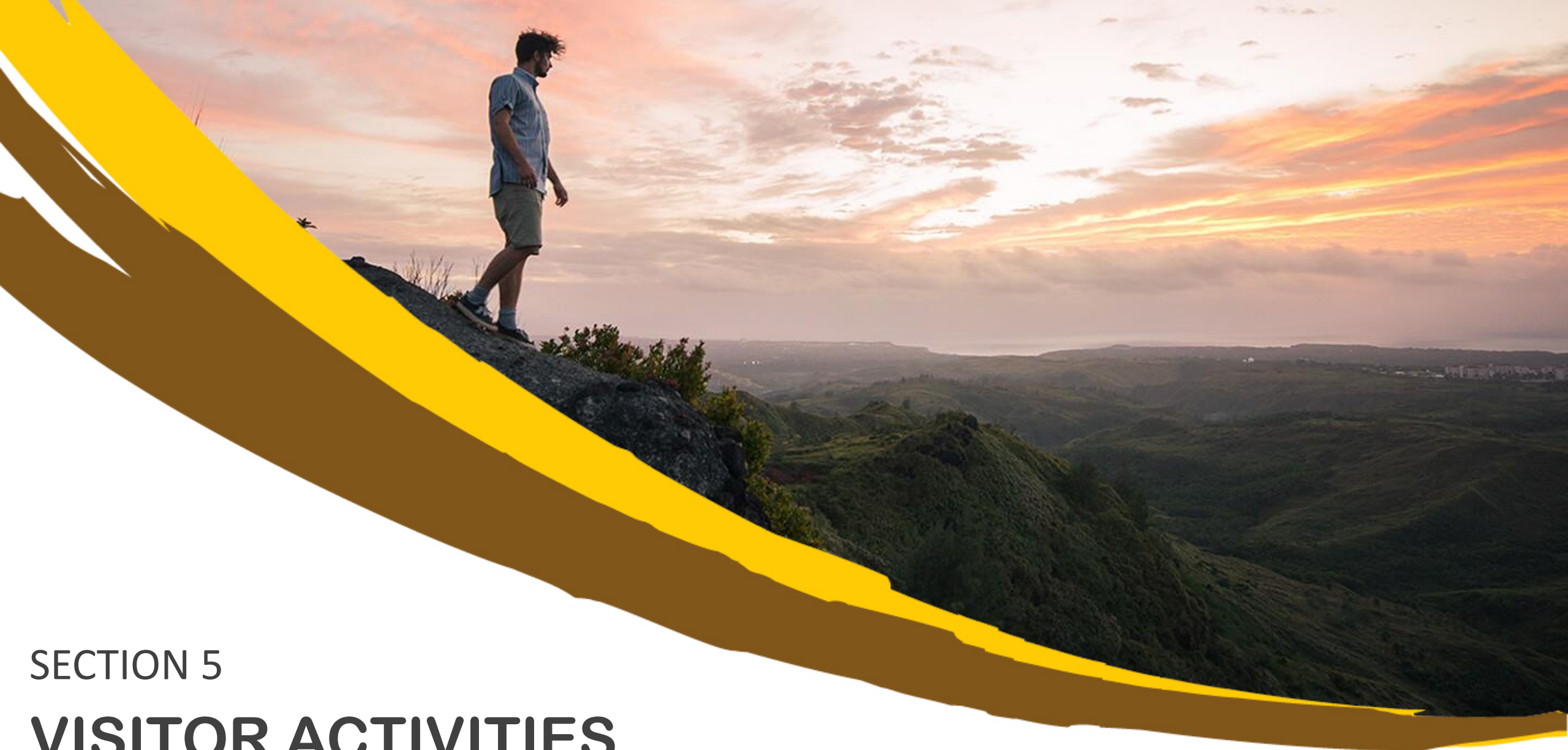


# TRIP EXPECTATIONS



# TRIP EXPECTATIONS – TRACKING



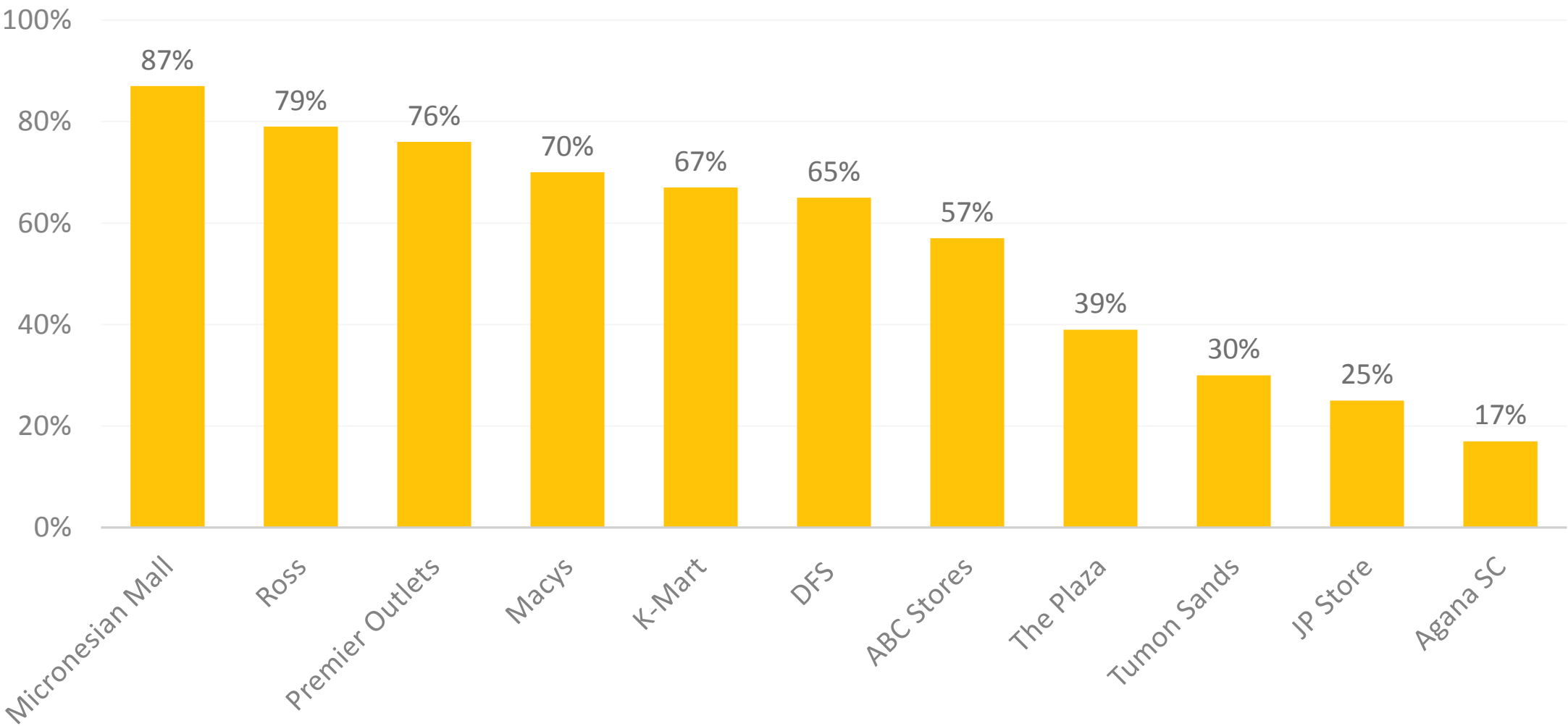


## SECTION 5

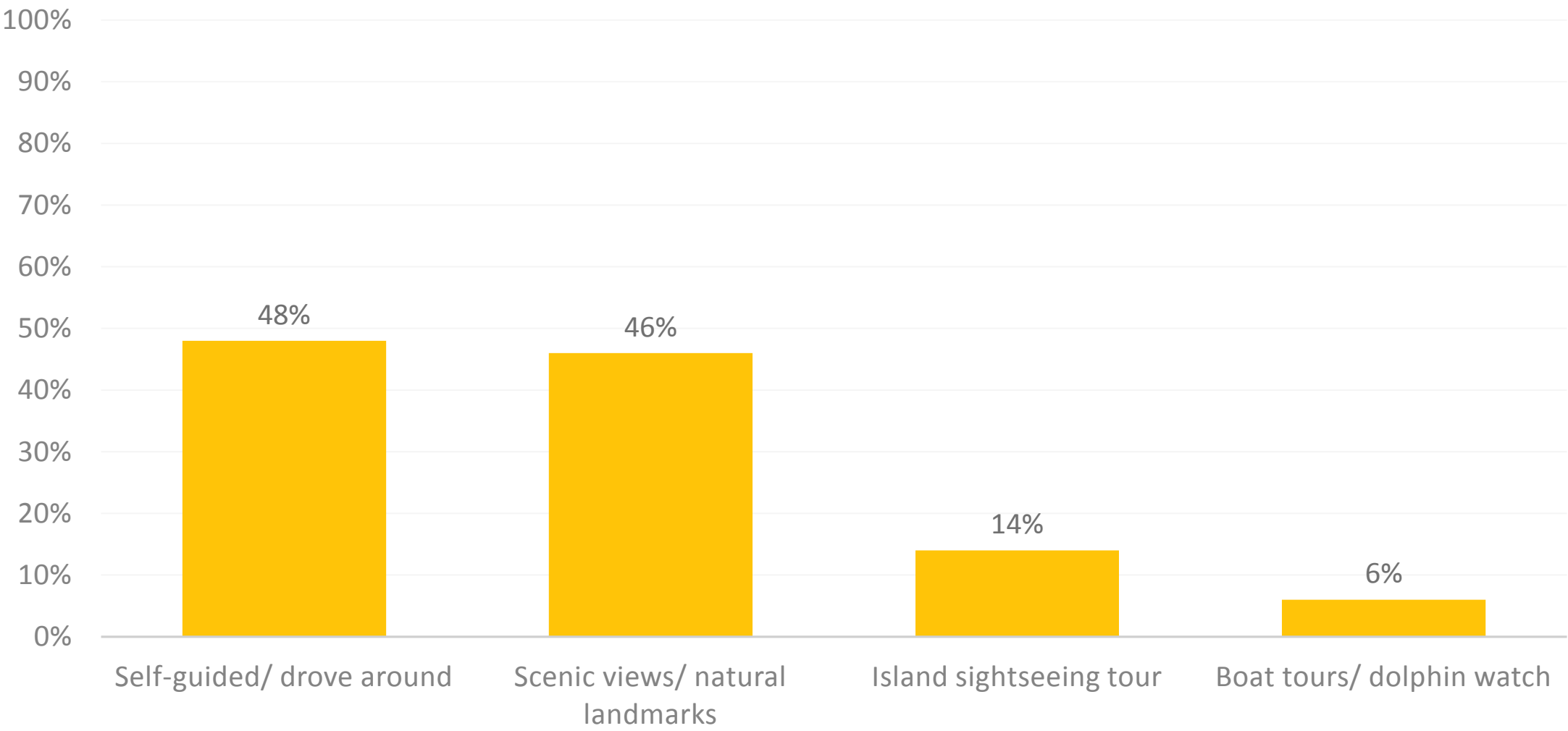
# VISITOR ACTIVITIES



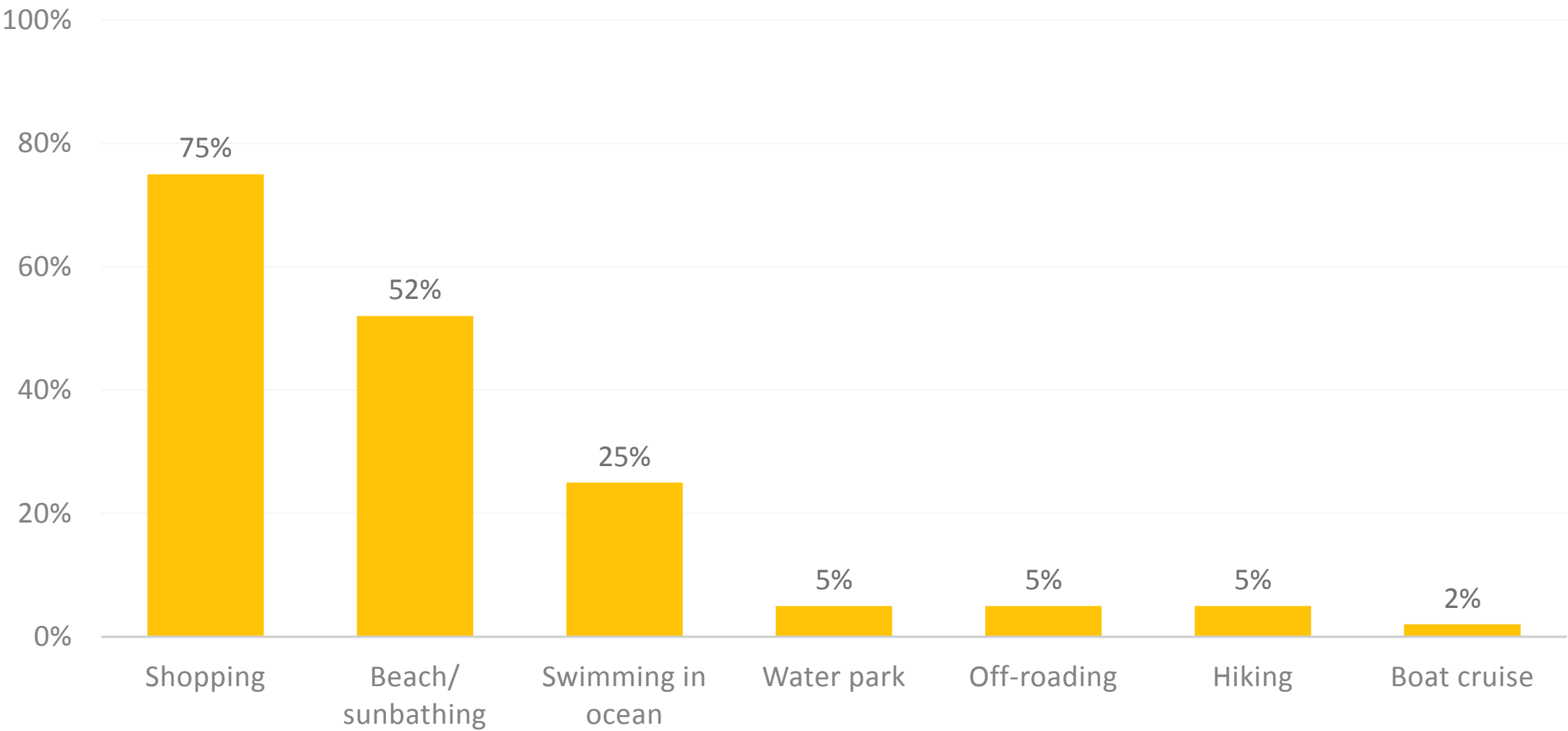
# SHOPPING AREAS – PENETRATION



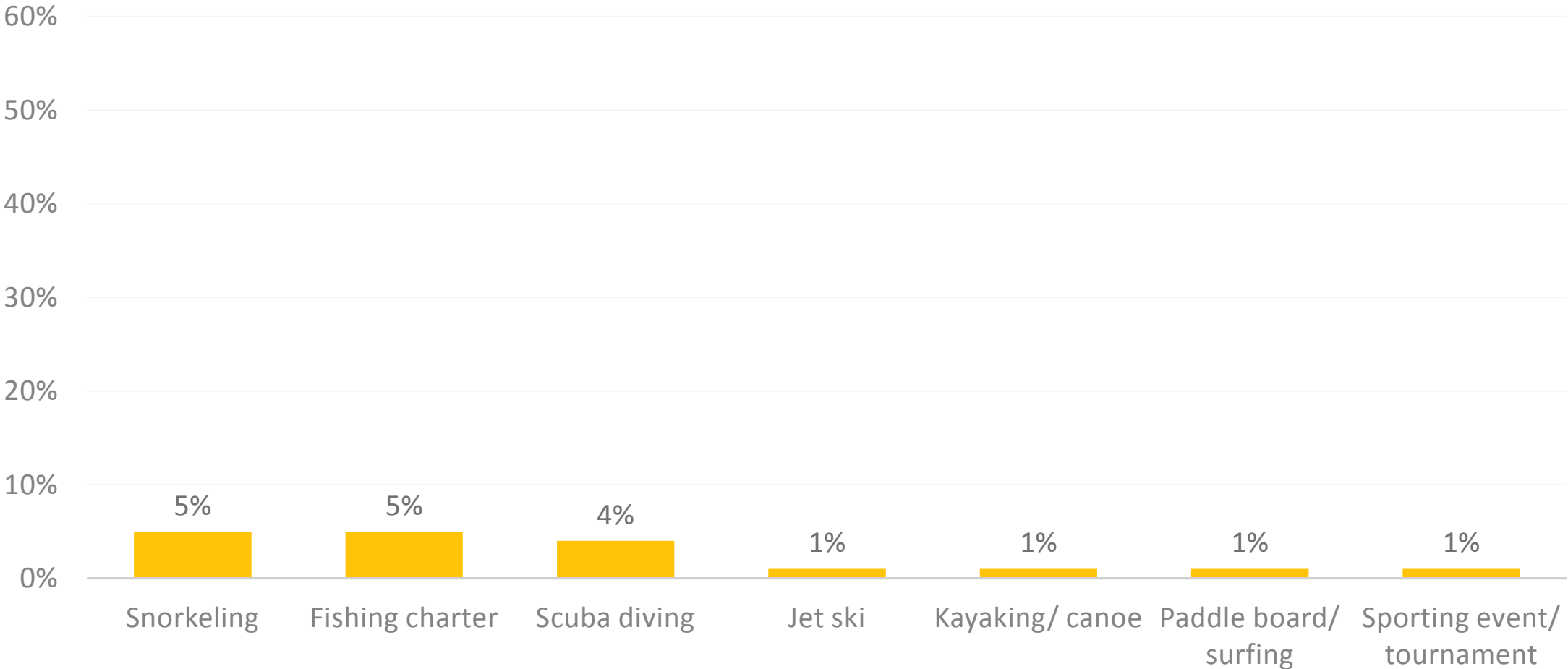
# ACTIVITIES – SIGHTSEEING



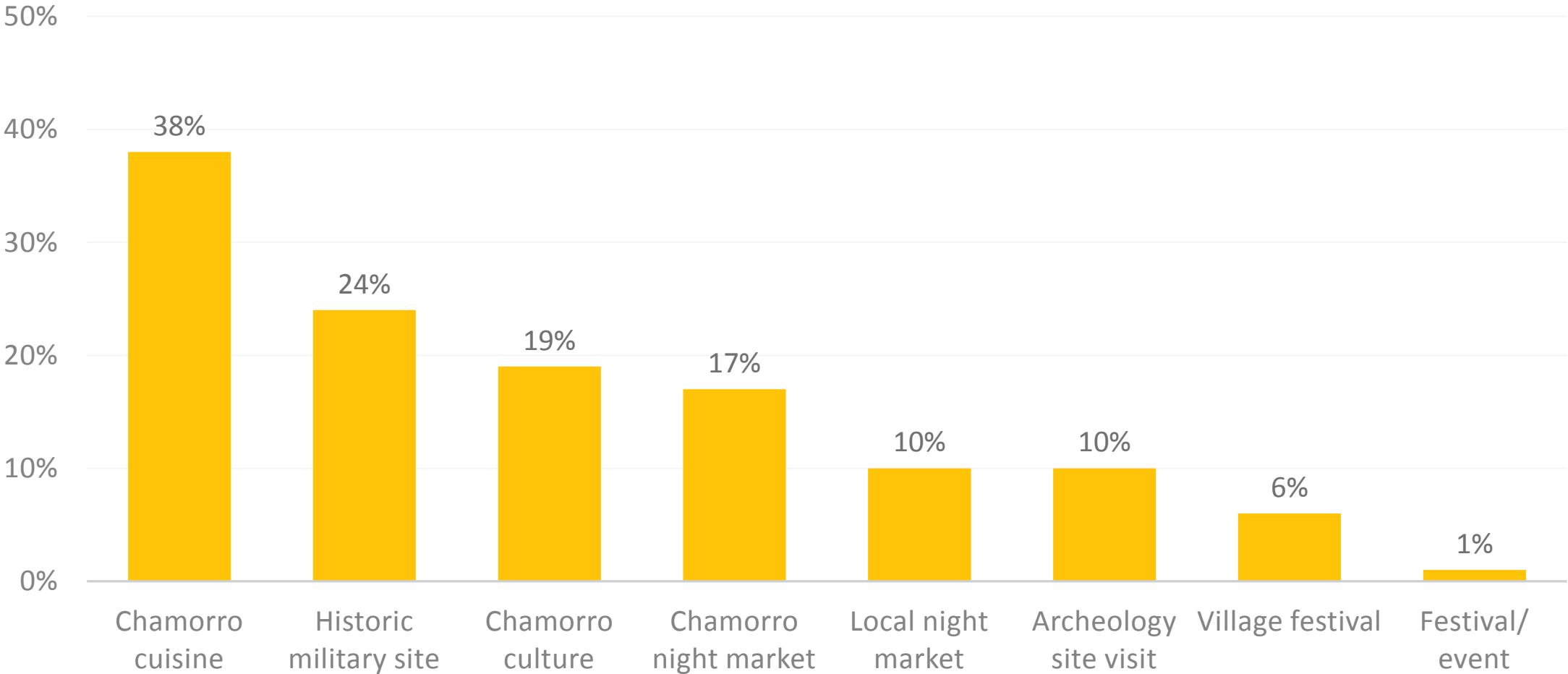
# ACTIVITIES – RECREATION



# ACTIVITIES – SPORTS

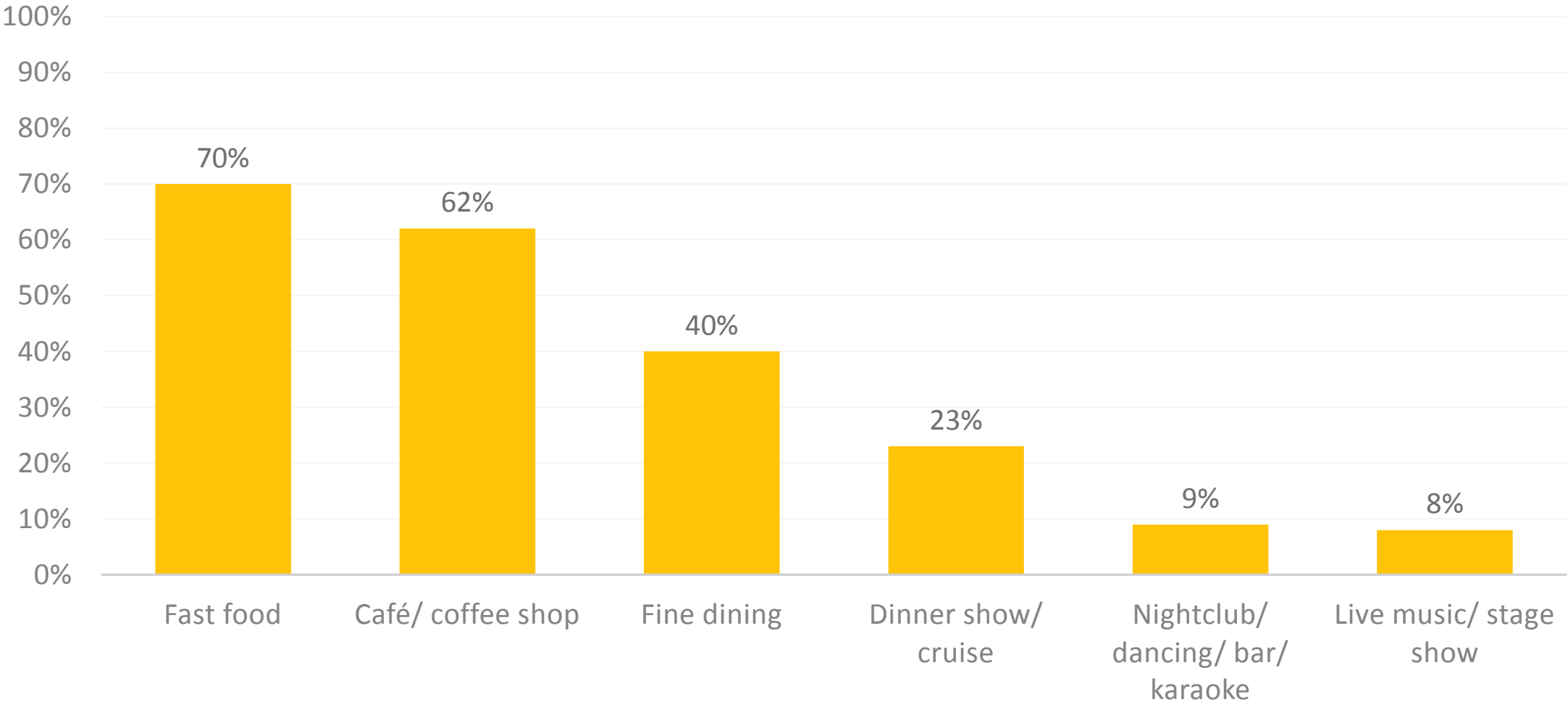


# ACTIVITIES – HISTORY, CULTURE, ARTS

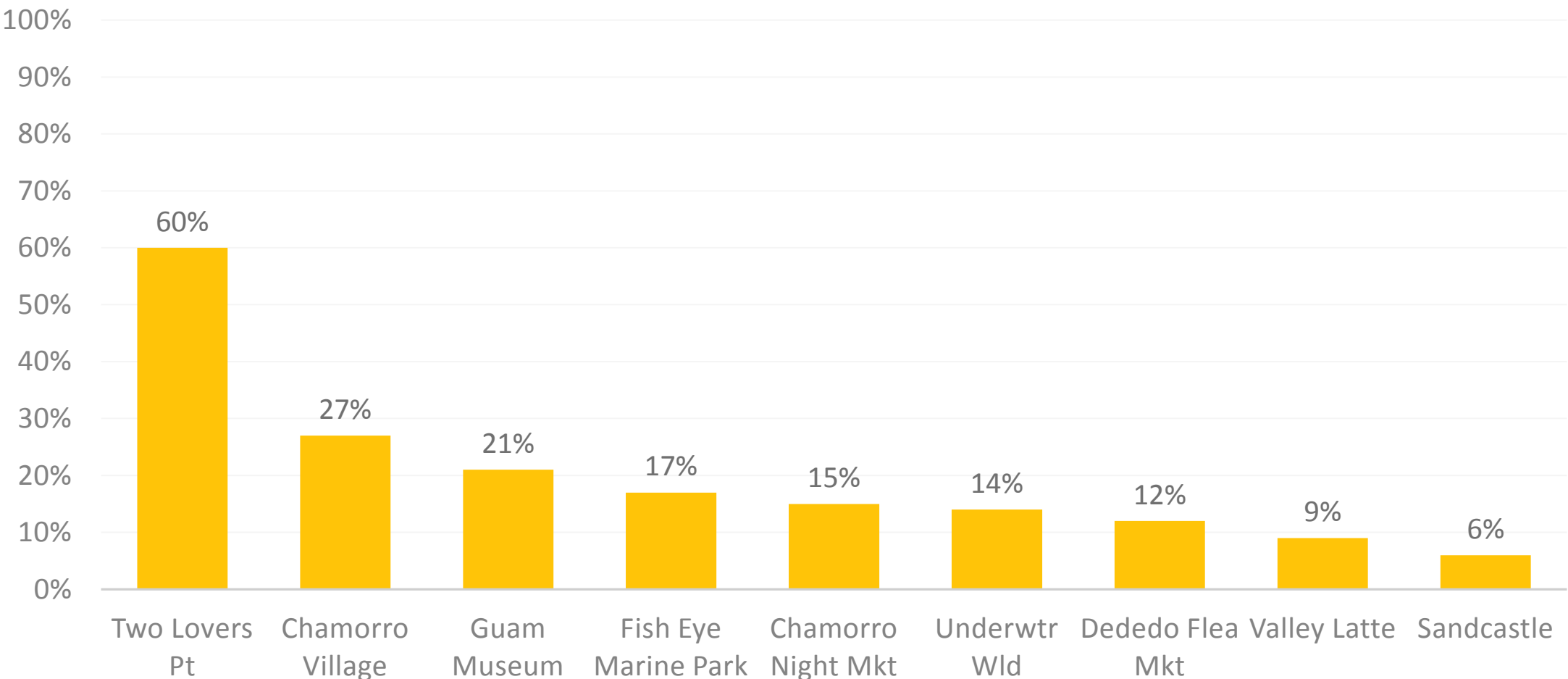




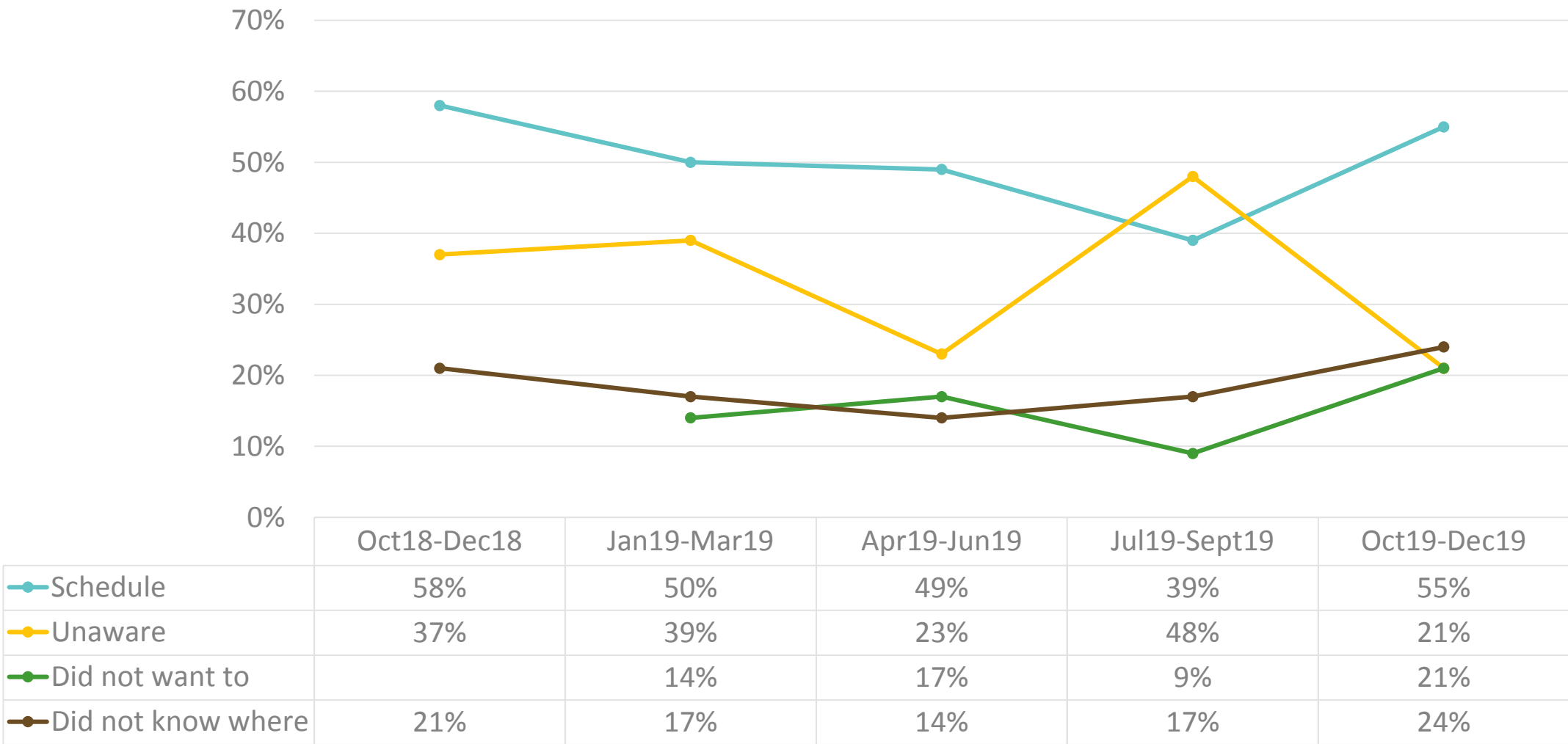
# ACTIVITIES – ENTERTAINMENT & DINING



# LOCAL ATTRACTIONS – TOP RESPONSES (5%+)



# LOCAL CULTURE – OBSTACLES



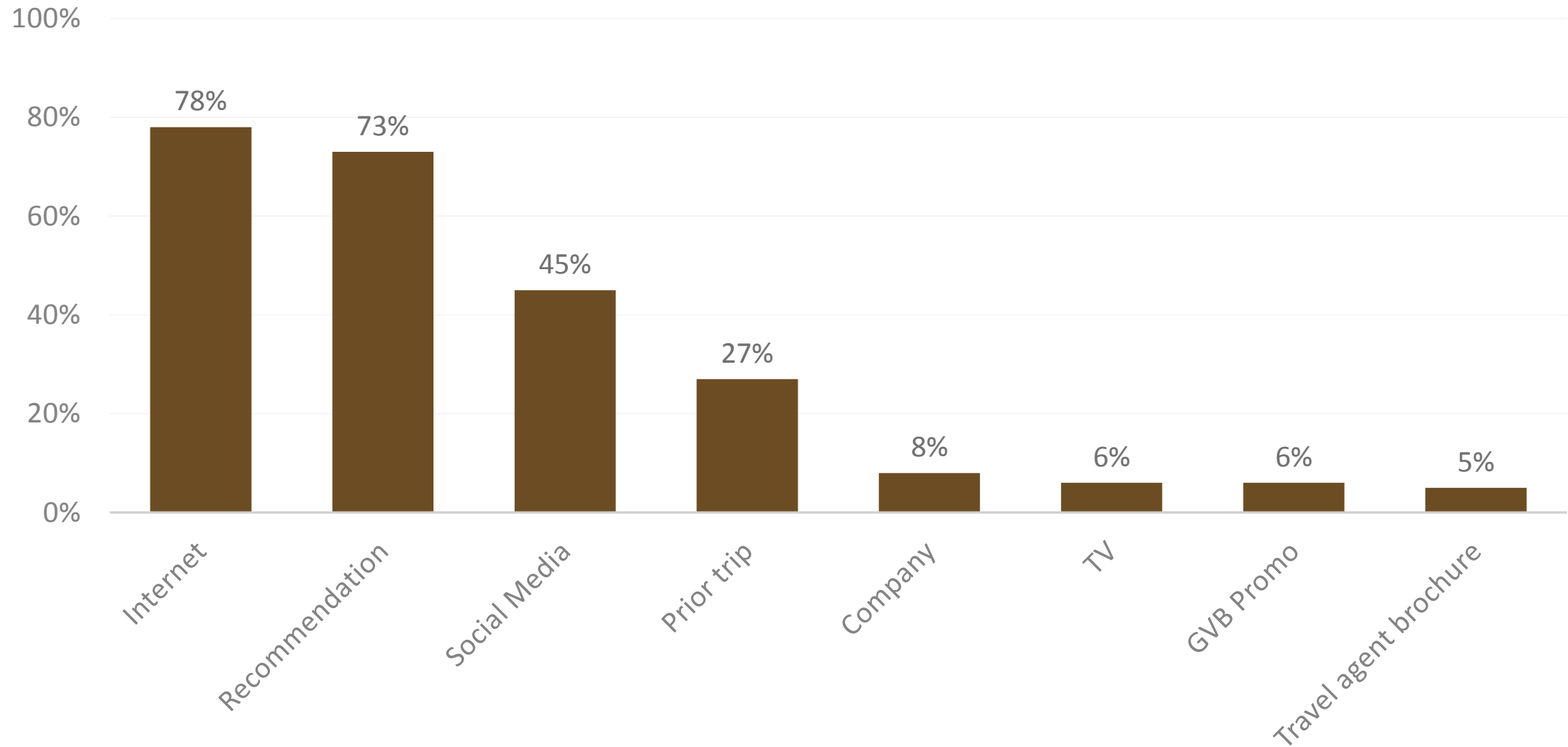


## SECTION 6

# SOURCES OF INFORMATION



# PRE-ARRIVAL SOURCES OF INFORMATION



# PRE-ARRIVAL SOURCES OF INFORMATION - SEGMENTATION

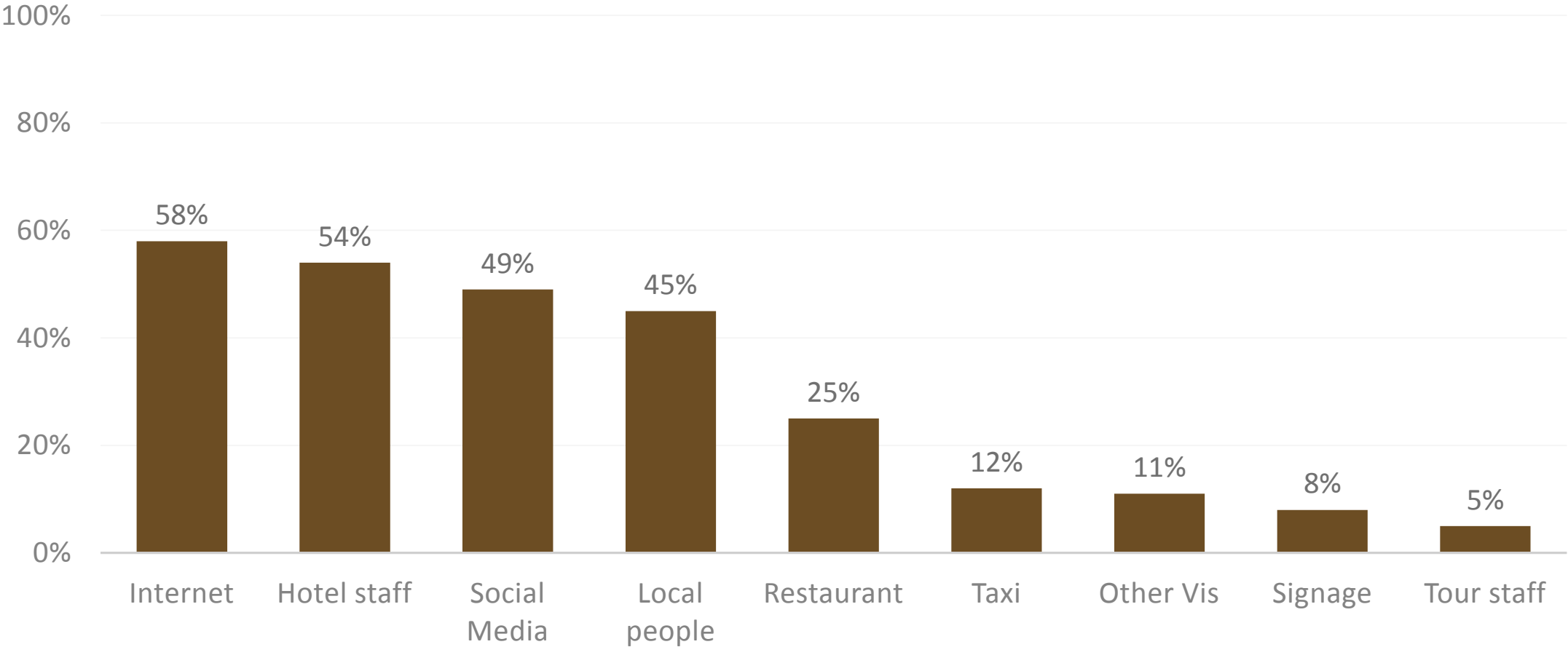
## GVB VISITOR SATISFACTION STUDY

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

		TOTAL	FAMILY	FIT	MICE	LEISURE
		-	-	-	-	-
Q5	Internet/Mobile App	78%	75%	78%	100%	83%
	Friend or relative	73%	78%	74%	100%	72%
	Social media	45%	49%	46%	100%	45%
	I have been to Guam before	27%	29%	28%		27%
	Co-worker/ company travel department	8%	5%	8%		8%
	TV	6%	8%	6%		6%
	Guam Visitors Bureau promotional activities	6%	5%	6%		6%
	Travel agent brochure	5%	3%	3%		5%
	Magazine (consumer)	3%	5%	3%		3%
	Guam Visitors Bureau office	3%	3%	3%		2%
	Travel trade shows	3%	3%	1%		3%
	Newspaper	2%	2%	2%		2%
	Travel guide book at bookstores	2%		2%		1%
	Total	102	59	100	2	86

\*Prepared by Anthology Research\*

# ONISLE SOURCES OF INFORMATION





# ONISLE SOURCES OF INFORMATION

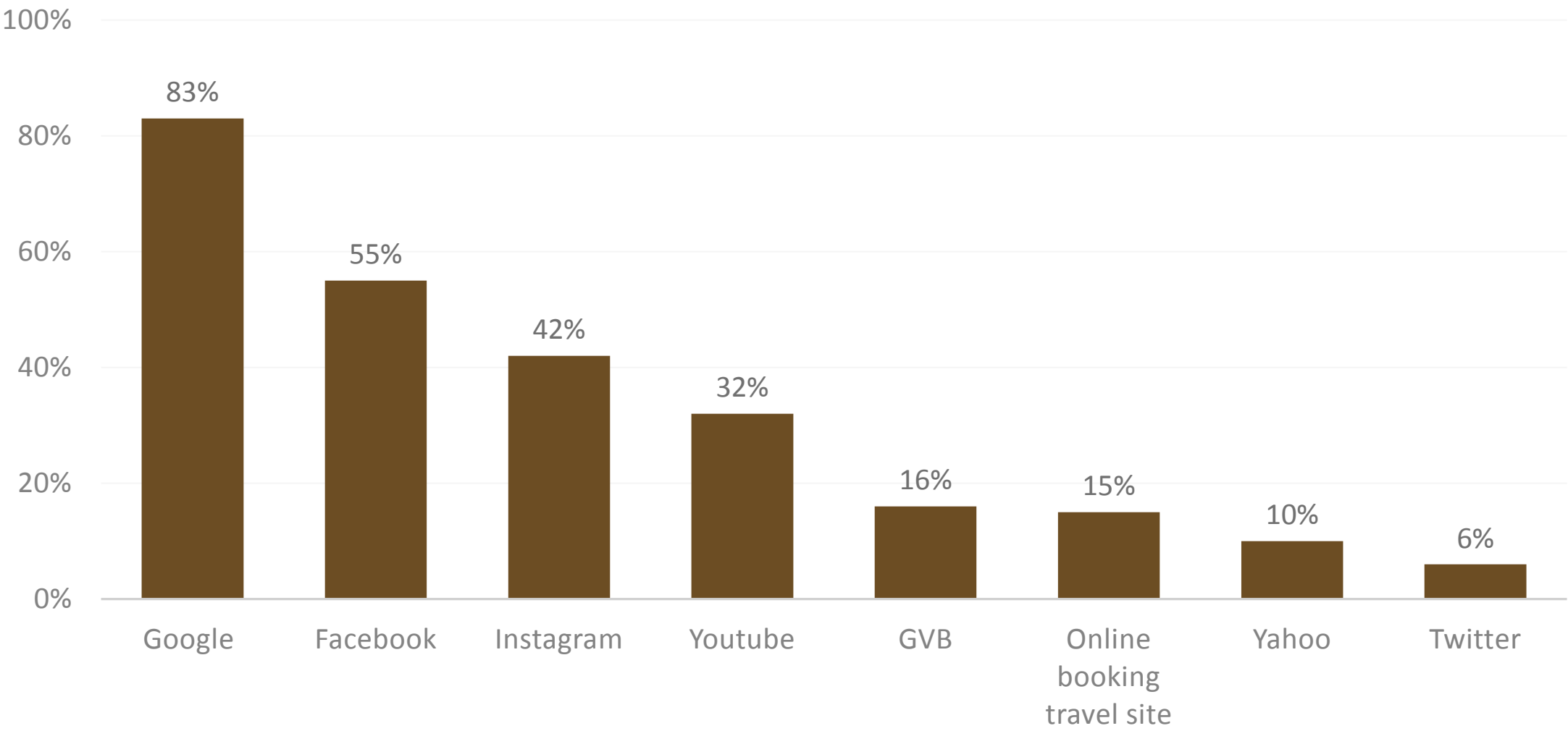
**GVB VISITOR SATISFACTION STUDY**  
**Q6 Please select the top three sources of information you used to find out about Guam while you were here**

		TOTAL	FAMILY	FIT	MICE	LEISURE
		-	-	-	-	-
Q6	Internet/ Mobile App	58%	56%	59%		56%
	Hotel staff	54%	51%	53%	100%	58%
	Social Media	49%	58%	49%	50%	52%
	Local people	45%	41%	45%		41%
	Restaurant staff (outside hotel)	25%	25%	25%		27%
	Taxi drivers	12%	10%	12%	100%	13%
	Other visitors	11%	8%	11%		10%
	Signs/ advertisement	8%	12%	8%		5%
	Tour staff	5%	2%	3%	50%	6%
	Guam Visitors Bureau	4%	2%	4%		5%
	Visitors channel	3%	5%	3%		2%
	Retail staff	2%	3%	2%		2%
	Local publication	2%	2%	2%		1%
	Total	102	59	100	2	86

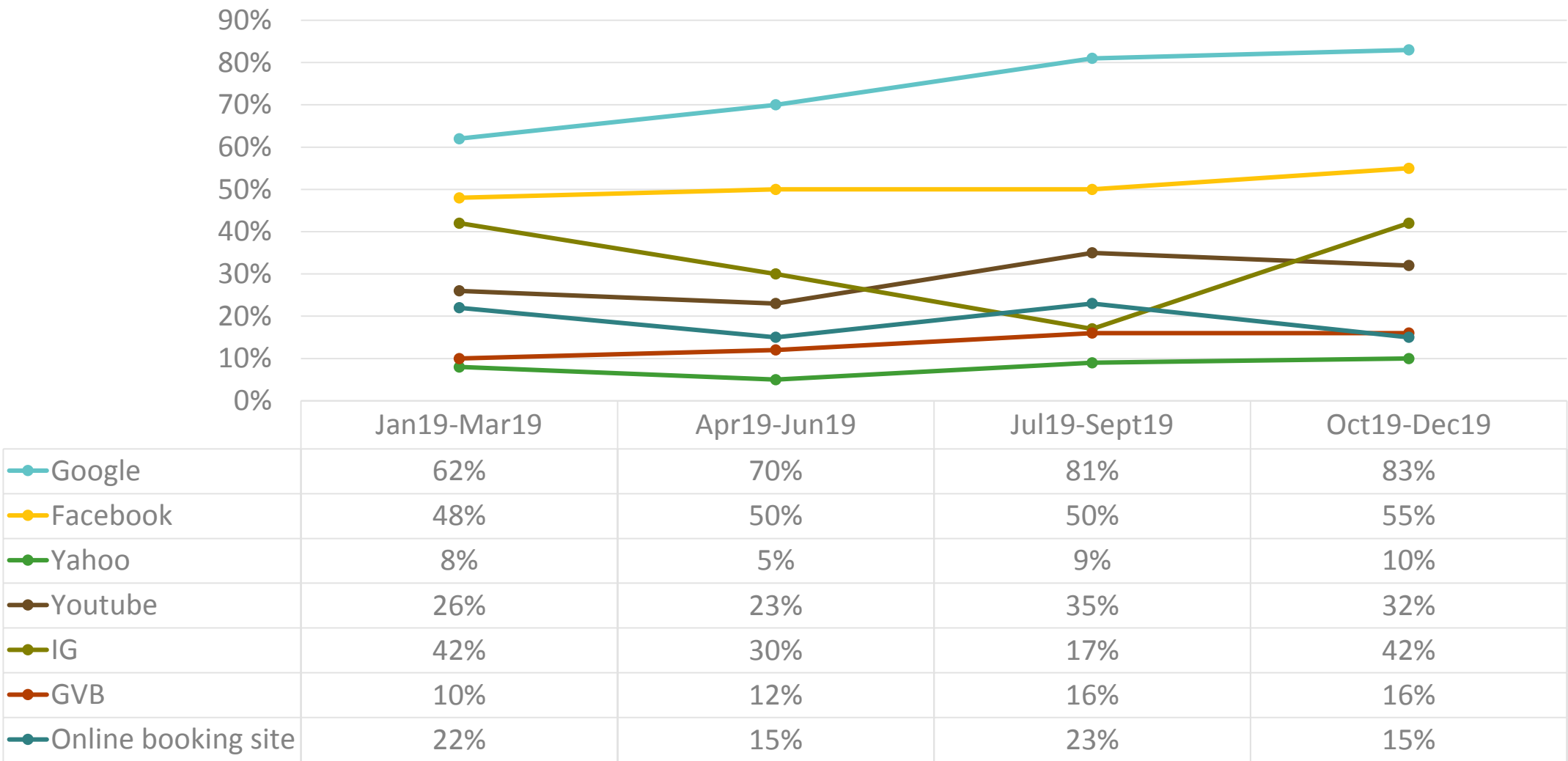
\*Prepared by Anthology Research\*



# ONLINE SOURCES OF INFORMATION



# ONLINE SOURCES OF INFORMATION



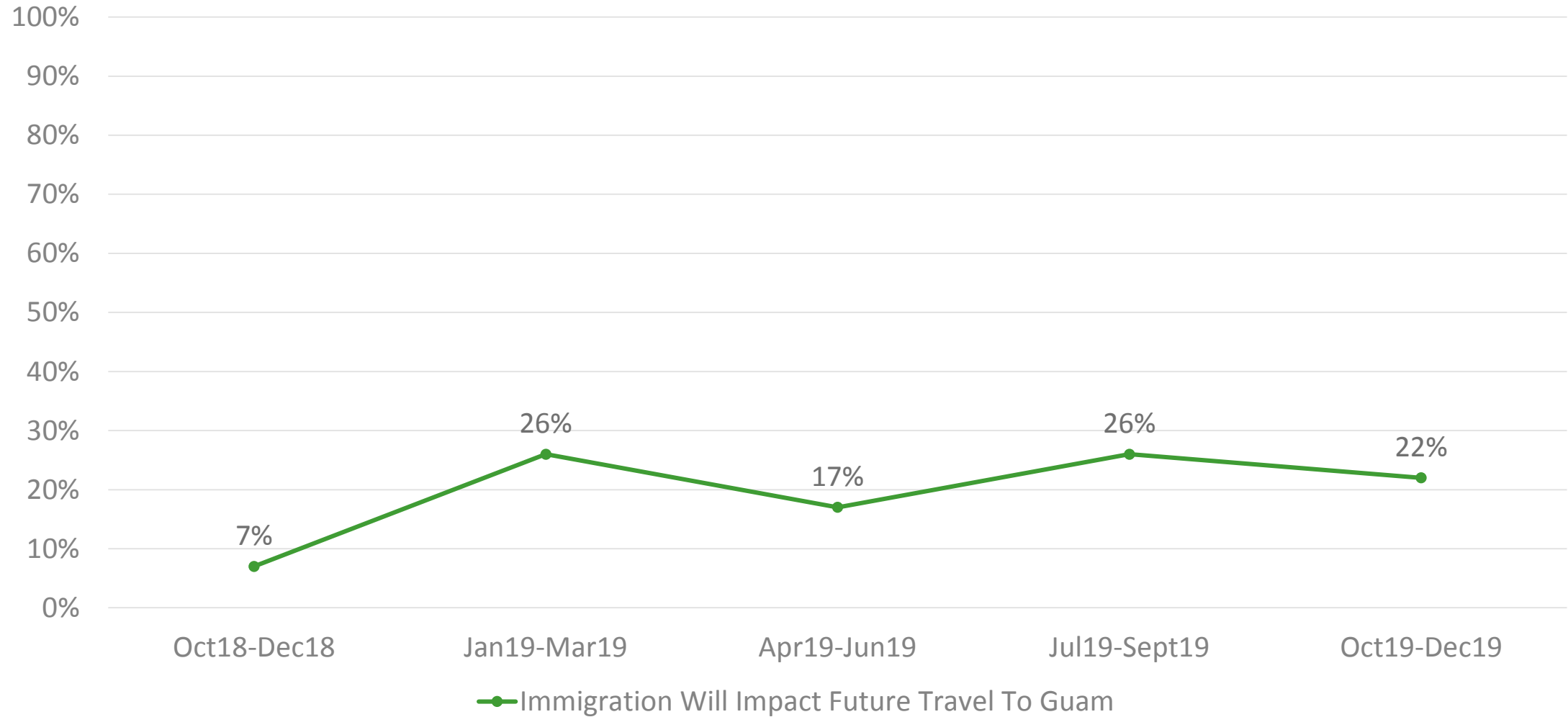


SECTION 7

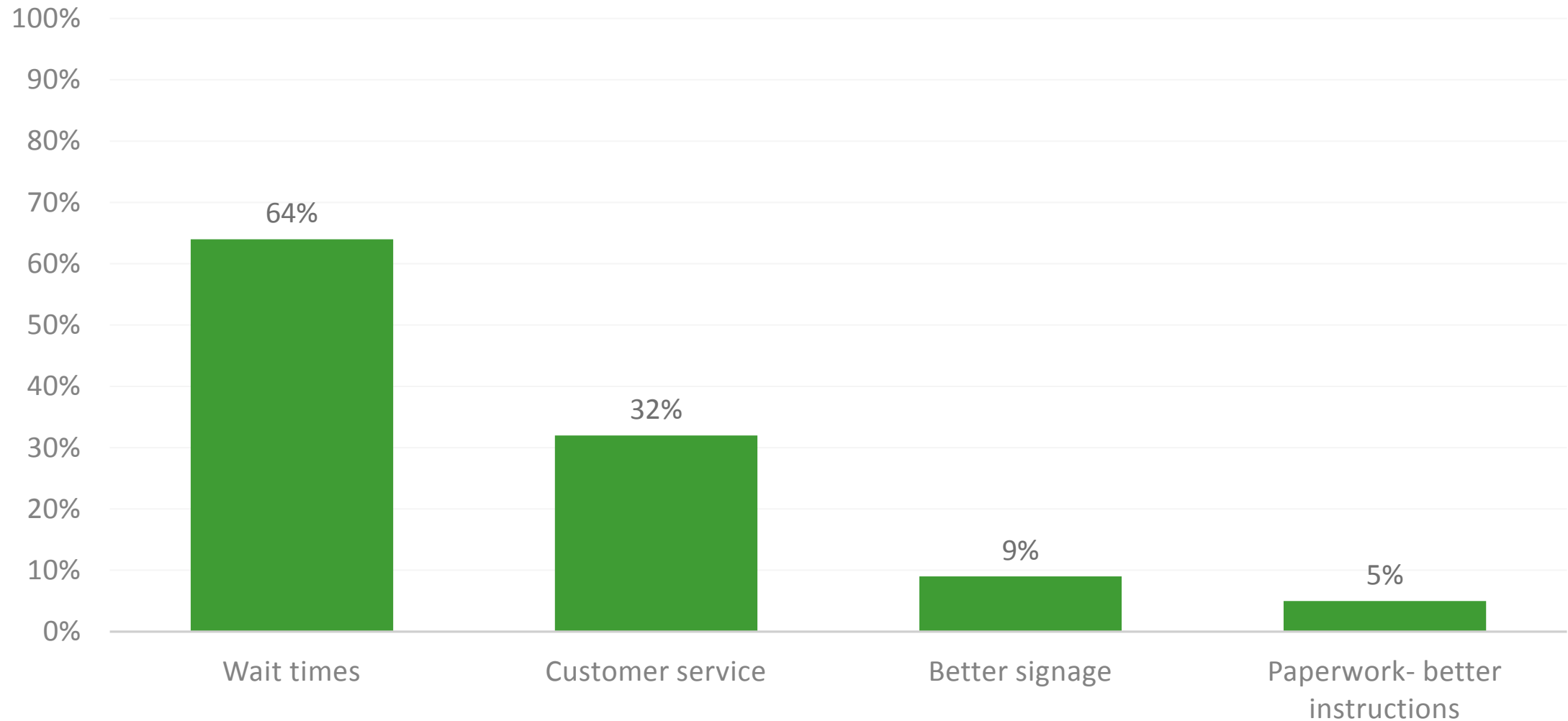
**IMMIGRATION**



# 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, Jan-Dec 2019					
	Jan-Mar 2019	Apr-Jun 2019	Jul-Sept 2019	<b>Oct-Dec 2019</b>	Jan-Dec 2019
Drivers:	rank	rank	rank	<b>rank</b>	rank
Entertainment			1		4
Shopping					
Dining				<b>1</b>	1
Beaches				<b>3</b>	
Parks				<b>4</b>	
Roads				<b>2</b>	
Sightseeing Areas	1	1			3
Being a safe and secure destination					2
% of Overall Satisfaction Accounted For:	4.2%	4.9%	7.2%	<b>42.8%</b>	12.2%
NOTE: Only significant drivers are included.					



# DRIVERS – OVERALL SATISFACTION

- **Overall satisfaction** with the Philippine visitor's experience on Guam is driven by four significant factors in the October – December 2019 Period. By rank order, they are:
  - **Dining,**
  - **Roads,**
  - **Beaches, and**
  - **Parks.**
- With these factors the overall  $r^2$  is .42.8, meaning that **42.8% of overall satisfaction is accounted for by these factors.**

# DRIVERS – ONISLE EXPENDITURES

Comparison of Drivers of Per Person On Island Expenditures, Jan-Dec 2019					
	Jan-Mar 2019	Apr-Jun 2019	Jul-Sept 2019	<b>Oct-Dec 2019</b>	Jan-Dec 2019
Drivers:	rank	rank	rank	<b>rank</b>	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%	<b>0.0%</b>	5.6%
NOTE: Only significant drivers are included.					

# DRIVERS – ONISLE EXPENDITURES

- **Per Person On Island Expenditure** of Philippine visitors on Guam is driven by no significant factor in the October – December 2019 Period.