TOURISTS' PROFILE AND LEVEL OF SATISFACTION STUDY

SUMMERY REPORT

DOMESTIC MARKET
SPRING 2018

Observatorio Integral de la Región Turística
Puerto Vallarta-Bahía de Banderas

Contenido

I. Presentation

According to official information, Puerto Vallarta-Bahía de Banderas destination has maintained positive numbers when it comes to occupancy rates, and as a result, there has been a rewarding economic income in the last holiday periods. The domestic market has meant a solid contribution to national tourist destinations compared to seasonality of tourist international market, mainly on Easter holidays as well as public holidays. Due to an environment in continuous change, in which elements such as the insecurity and the economy of the country are part of, the continuous and systematic monitoring of the domestic tourists' profile and evaluation of the destination is a must when it comes to making decisions.

In this study, the results of the data collected during Easter 2018 are shown, in some cases, the information collected this year is compared to the one collected last year in Easter time as well, to identify some variations and tendencies on the demand of the domestic market. This way, the comparison of the data collected will be very useful to all of the instances and dependences of tourism so that they can design strategies that allow the region of Puerto Vallarta-Bahía de Banderas as a competitive destination.

II. Methodology

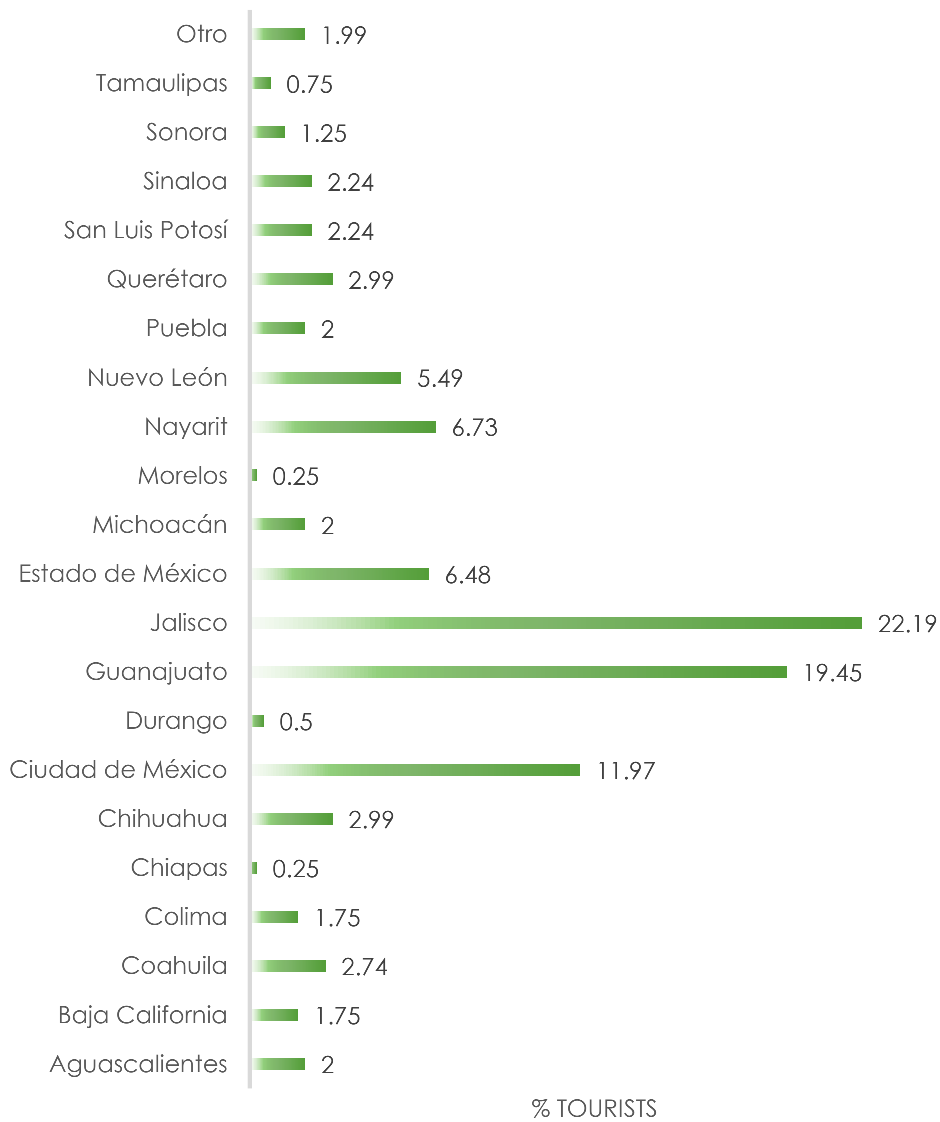
The fieldwork needed to obtain the main characteristics of the domestic market during Easter 2018 is described in the following chart:

Universe	Visitors to Puerto Vallarta-Bahía de Banderas adults staying at least 24 hours.
Sampling technique	Simple random sampling define on simple points in major tourist areas of the destination.
Points in data collection	Marina Vallarta, Centro Histórico, Zona Hotelera Las Glorias, Zona Romántica (south), Airport, Bus Stations, Bucerías, Sayulita.
Sampling error	Confidence level of 95%, and sampling error of 5%.
Sample size	420 valid surveys.
Fieldwork	Done by a group of pollsters from 24th to 31st of March 2018.

III. Tourist's social economic profile

On this section, the main domestic market's social economic variables are shown. They are: State of origin, age, education level, occupation, way of traveling, travel budget; this information allows us to define the tourist's profile who travels to this region of the Mexican Pacific.

Hometown



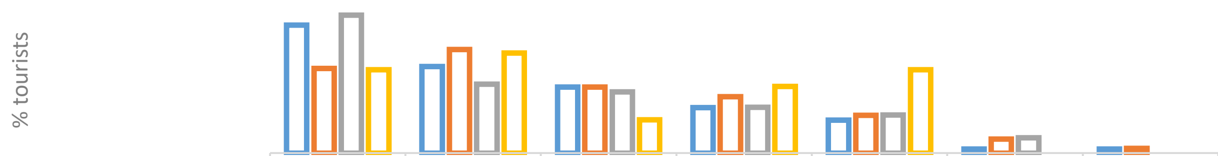
During Easter 2018 people from Jalisco, Guanajuato and Ciudad de México were the majority who visited the destination, and the ones who visited the least were from Estado de México, Nayarit y Nuevo León. The number of people coming from the North of Mexico has increased lightly compared to Easter 2017, as it is shown in the following chart.

Year	2017	2018
Aguascalientes	1.75	1.91
Ciudad de México	15.79	11.48
Durango	0.88	0.48
Jalisco	28.51	21.29
Estado de México	3.95	6.22
Michoacán	0.44	1.91
Morelos	1.32	0.24
Nuevo León	3.07	5.26
Puebla	3.07	1.91
Querétaro	3.07	2.87
San Luis Potosí	2.63	2.15

Percentage change of important issuing markets towards the region (%)

Age and hometown of the main issuing markets

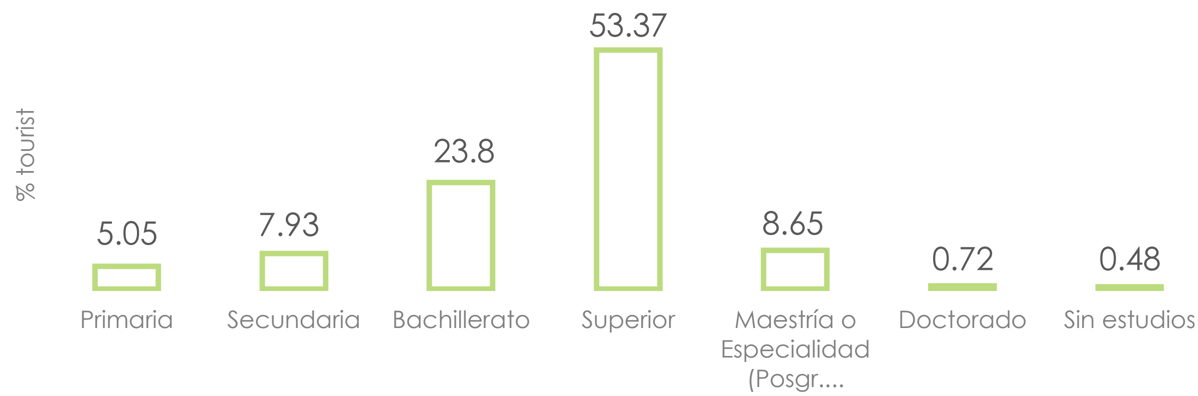
As it was observed, the main age range was from 18 to 25 coming mainly from the states of Jalisco and Ciudad de México, on the other hand, an age range from 26 to 33 was mainly from people coming from the states of Guanajuato and Nuevo León.



	18-25	26-33	34-41	42-49	50-57	58-65	más de 65
Jalisco	34.83	23.60	17.98	12.36	8.99	1.12	1.12
Guanajuato	23.08	28.21	17.95	15.38	10.26	3.85	1.28
Ciudad de México	37.50	18.75	16.67	12.50	10.42	4.17	0.00
Nuevo León	22.73	27.27	9.09	18.18	22.73	0.00	0.00

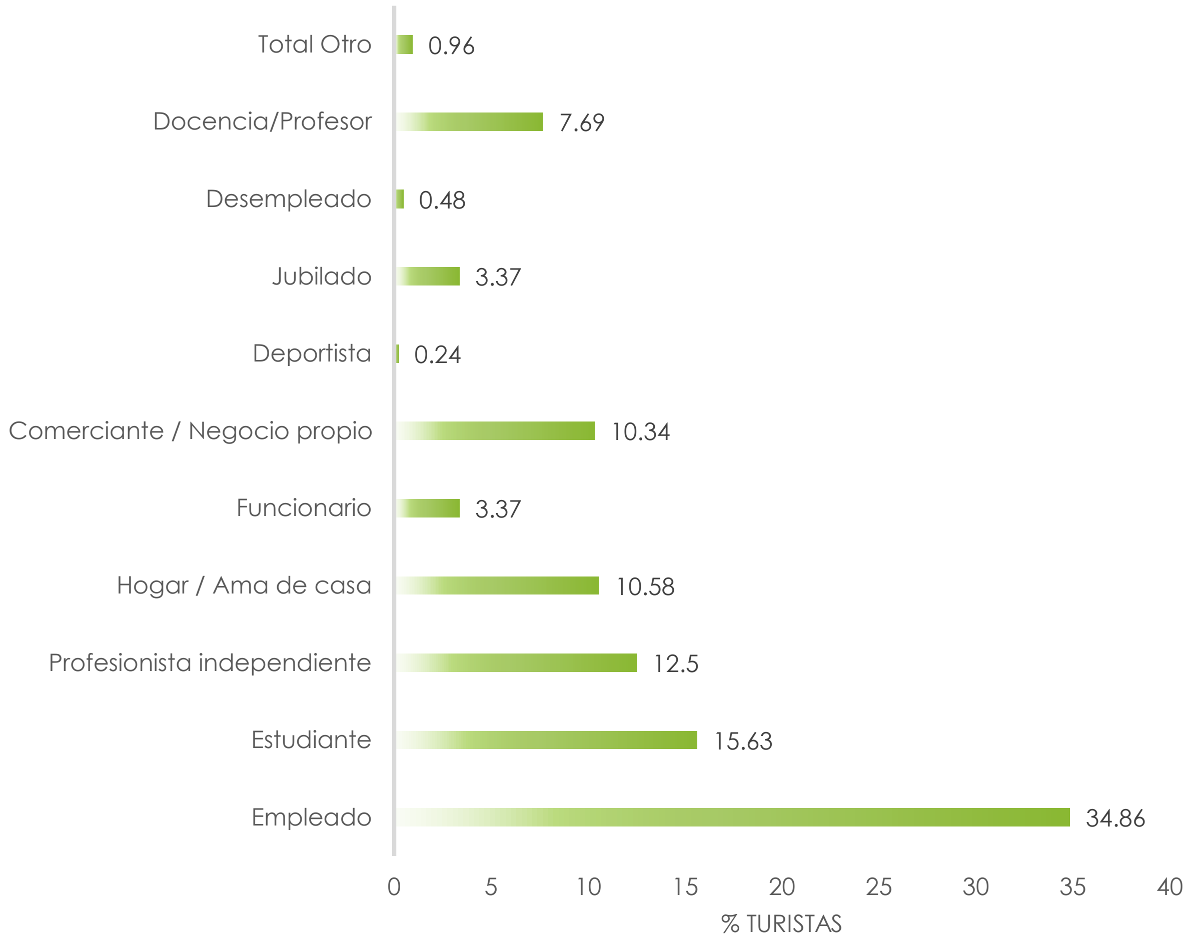
Schooling

The tourist's schooling level shows some slightly variations compared to the 2017 Easter holidays. Comparing both 2017 and 2018, it is observed that there is a similar schooling level between them, mainly in higher education followed by high school; both reached the 77.17% of the people interviewed. People with postgraduate studies represent only 8.7%, slightly higher than the study made last spring vacation.



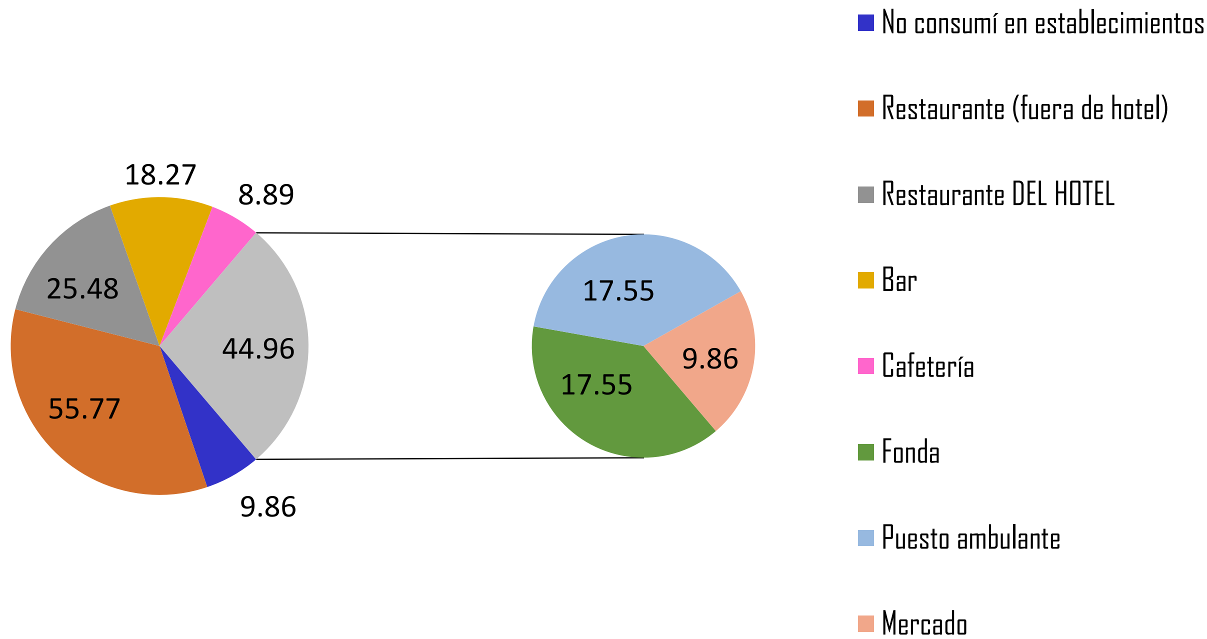
Occupation

More than 34% of the tourists polled say they have a job, and 22% of the people say they work as freelancers or in their own business. Likewise, more than 15% said they were students, which indicates how attractive the destination is for the young segment during Easter holidays.



Feeding

All-inclusive programs imply that tourists can enjoy all of the services offered by the hotels and other accommodation services, including bars and restaurants. These programs, in the Puerto Vallarta-Bahía de Banderas destination, are essential in the accommodation offers in the region. However, generally speaking, during 2018 Easter holidays, the food consumption is distributed mostly in restaurants, small food businesses and illegal street food businesses. More than 62% of the people polled said that they had consumed in one or more of those businesses.



*Multiple choice, the total might be more than 100%.

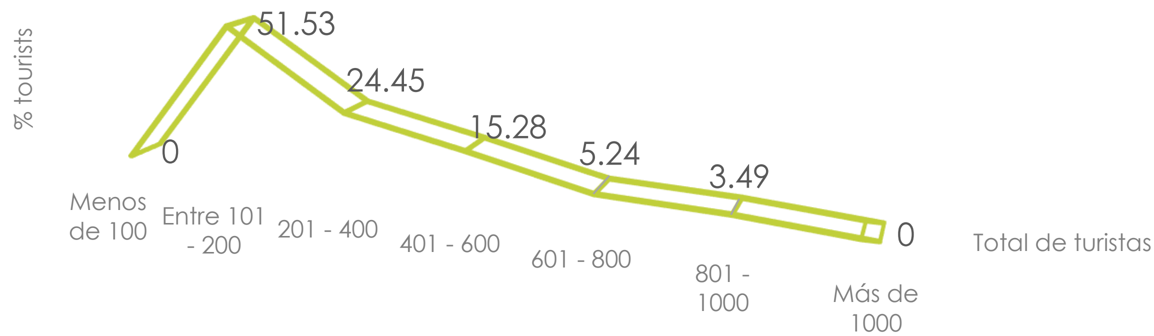
In general, comparing last year to this year, during 2018 Easter holidays, the food consumption, out of the hotels, was obviously increased especially in the small food businesses and illegal street food businesses.

PLACES WHERE FOOD AND BEVERAGE SERVICES WERE TAKEN.	2017	2018
Bar	19.4	18.18%
Restaurant (out of the hotel)	32.76	55.50%
Restaurant in the hotel	40.52	25.36%
Small food business	4.31	17.46%
Cafeteria	12.93	8.85%
Illegal street food business	3.02	17.46%
Food market	12.50	9.81%
People who do not consume food and beverage services in establishments	24.14	9.57%
Others	3.02	0.96%

* Multiple choice, the total might be more than 100%.

Food expenses

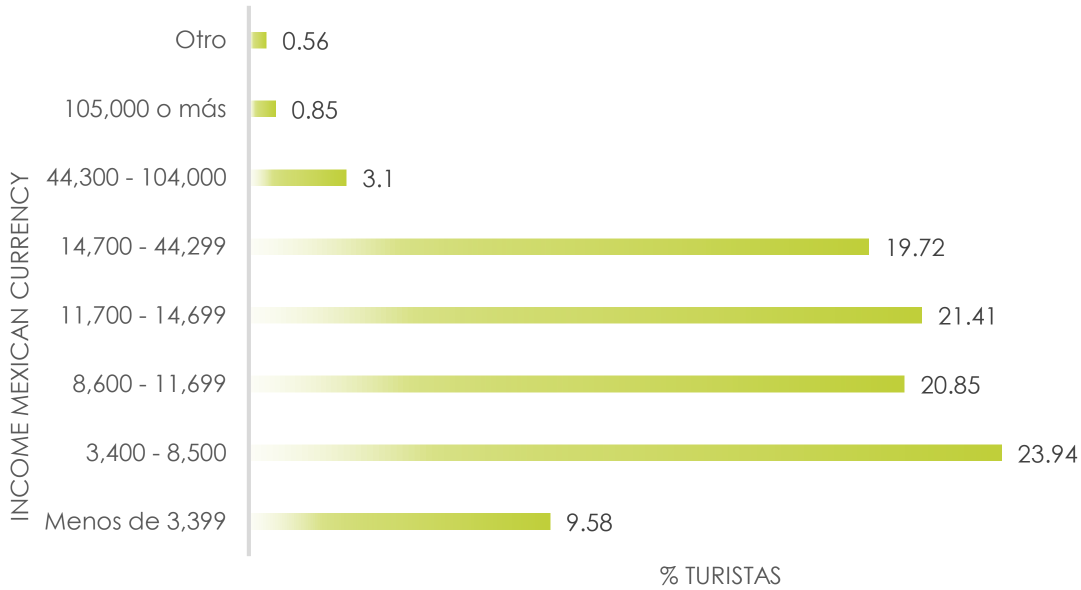
The distribution of the tourists, according to the food expenses range, is shown in the following chart. It is observed that the approximate budget for food per day per person is about 100 and 200 Mexican pesos. It is also observed that a few more than 3% spends 800 and 1000 Mexican pesos in food.



	Menos de 100	Entre 101 - 200	201 - 400	401 - 600	601 - 800	801 - 1000	Más de 1000
Total de turistas	0	51.53	24.45	15.28	5.24	3.49	0

Familiar monthly income

The familiar monthly income is distributed in middle and low social classes. According to the Asociación Mexicana de Agencias de Inteligencia de Mercado classification, the predominant social segments are E, D and D+, which represent to the social groups with incomes between 3,400 and 14,700 Mexican pesos per month. The social group with lower incomes to 3,400 Mexican pesos, represents almost 10% of the people polled, which can have an influence on a lower hiring of recreation services or the consumption of cheaper food services.



Income-Accommodation relation

The highest accommodation demand is mainly focused on the hotels; however, the options are diverse especially those that can be booked on line either on a website or social networks. Due to this, some of them can skip the applicable tax regime.

After observing the social segments for the level of incomes, the lowest purchasing power is emphasized, those who win less than 3,400 Mexican pesos per month. More than 52% belonging to this social segment said that they would stay in hotels. Less than that, the option "staying at friend's or family's houses" with more than 20%, and the option "house or apartment rented" that represents 14.7 %.

Likewise, it is observed a similar behavior with the rest of the social groups, being the previous categories the ones the most mentioned while the application of the surveys.

Accommodation / Monthly income.	Menos de 3,399	3,400 - 8,500	8,600 - 11,699	11,700 - 14,699	14,700 - 44,299
Hotel	52.94%	42.35%	58.11%	53.95%	52.86%
Timeshare	-	1.18%	2.70%	2.63%	7.14%
Cabins	-	1.18%	-	-	1.43%
Hostel	5.88%	3.53%	1.35%	-	2.86%
Motel	-	-	1.35%	1.32%	-
Family and friend's house	20.59%	24.71%	17.57%	18.42%	8.57%
Department/rented house	14.71%	12.94%	5.41%	14.47%	20.00%
Own house	2.94%	4.71%	4.05%	5.26%	5.71%
Trailer Park	-	1.18%	-	-	-
Camping	2.94%	7.06%	6.76%	2.63%	1.43%
Other	-	1.18%	2.70%	1.32%	-

Income and food

The food consumption in illegal street small businesses and food markets is very evident in all the segments in the destination. It is weird that it happens that way, since those businesses are not regulated by any health agencies.

Income (mxn)	Less than 3,399	3,400 - 8,500	8,600 - 11,699	11,700 - 14,699	14,700 - 44,299	44,300 - 104,000
Restaurant (out of the hotel)	41.18%	52.94%	51.35%	55.26%	67.14%	81.82%
Restaurant in the hotel.	17.65%	20.00%	29.73%	25.00%	31.43%	45.45%
Bar	17.65%	17.65%	17.57%	17.11%	28.57%	36.36%
Small food business	17.65%	17.65%	22.97%	14.47%	17.14%	18.18%
Illegal street food business	26.47%	15.29%	17.57%	15.79%	18.57%	27.27%
Food market	8.82%	8.24%	6.76%	7.89%	15.71%	9.09%
I prepared my own food	14.71%	14.12%	8.11%	7.89%	2.86%	9.09%
Cafeteria	11.76%	11.76%	8.11%	7.89%	5.71%	27.27%
Other	-	1.18%	1.35%	-	-	9.09%

*Multiple choices, the people polled can select more than one option; the total might be more than 100%.

Incomes and the way to travel.

The way of getting to the destination is mainly by plane, bus or own car The rest of the options (charter bus, rental car, company car or motorcycle) appeared as a matter of minor importance. In these categories, the segment that uses the plane and the bus are the ones that earn between 3,400 and 11,700 Mexican pesos per month. Those who earn between 11,700 and 44,300 Mexican pesos use their own car.

	Plane	Own car	Bus
Less than 3,399	11.59%	8.33%	11.32%
3,400 - 8,500	26.09%	16.07%	33.02%
8,600 - 11,699	20.29%	16.67%	26.42%
11,700 - 14,699	11.59%	29.76%	16.04%
14,700 - 44,299	21.74%	24.40%	11.32%
44,300 - 104,000	5.80%	4.17%	-
105,000 or more	2.90%	-	0.94%
Other	-	0.60%	0.94%

Cost of the trip for incomes

Incomes (Mexican currency)	Less than 3,399	3,400 - 8,500	8,600 - 11,699	11,700 - 14,699	14,700 - 44,299
Cost of the trip					
Less than 6000	44.12%	24.71%	12.16%	10.53%	2.86%
6000 - 13000	32.35%	37.65%	33.78%	35.53%	32.86%
14000 - 21000	8.82%	15.29%	31.08%	26.32%	27.14%
22000 - 29000	8.82%	2.35%	5.41%	9.21%	21.43%
30000 - 37000	-	3.53%	6.76%	10.53%	5.71%
38000 - 45000	-	4.71%	2.70%	3.95%	1.43%
More than 46000	-	-	1.35%	1.32%	5.71%
Unknown	5.88%	11.76%	6.76%	2.63%	2.86%

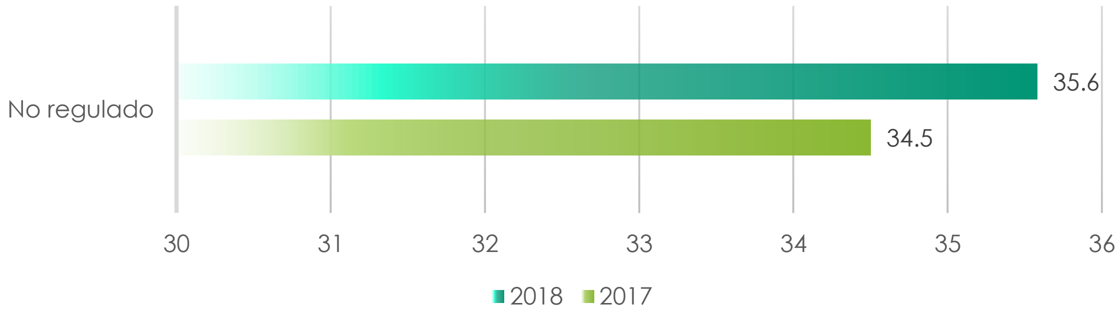
IV. Characteristics of the trip

Accommodation types

As it has been said, the participation of each population segment and the accommodation type used shows a significant division between the regulated and unregulated establishments. The category "Family and friend's house", "rented house" and "own house" are considered as unregulated establishments. This is because they are not part of any tax collection regime. The total of the people polled that selected these categories is 35%, plus it could be added those that selected the "camping" option which is 6.01% , especially those who go camping in Sayulita, Bahía de Banderas; in which, by the way, there is a great offer of camping services with restrooms, electricity, and water and drainage services.

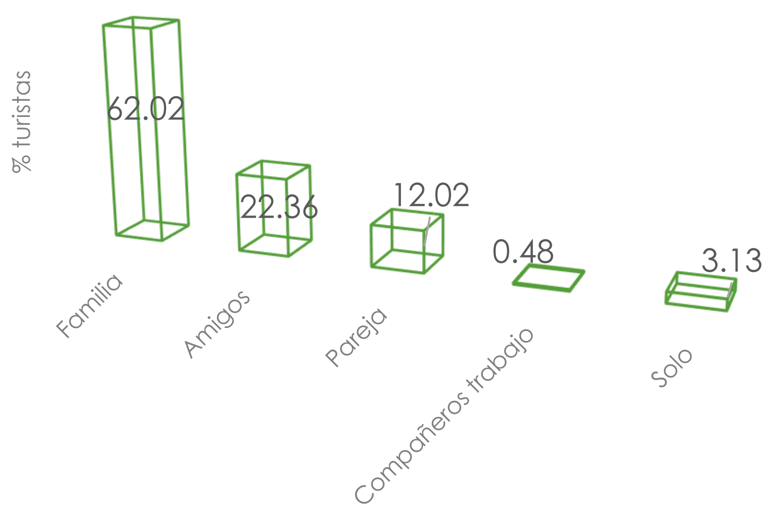
	% participation
Hotel	49.04
Timeshare	3.37
Cabins	0.48
Hostel	3.13
Motel	0.96
Family and friend's house	17.55
Department/rented house	13.46
Own house	4.57
Trailer Park	0.24
Camping	6.01
Other	1.2

According to the historic, during the same period last year, the tendency for unregulated accommodation keeps growing, in this case for 1 point percentage. In the following chart the 2017-2018 comparative is shown.



Who do you travel with?

Relaxing is the main reason why the domestic market travels during this vacation time, which represents 87.02% of the people polled. Likewise, 62% said they travel with family, 22.3% with friends and only 12% with their couples.



Vacation length

Just as the way the international market does it, the tendency with the domestic market seems to be similar; short periods of time. Compared to last year, staying in the destination for 3 or 4 nights increased more than 5%; meanwhile, staying for more than a week decreased as it is shown in the following chart.

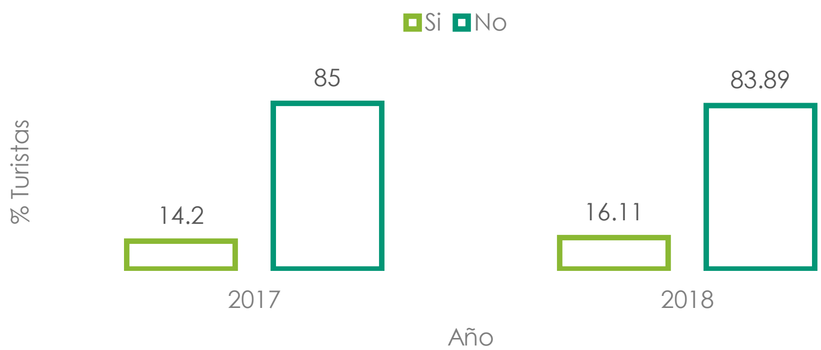
Vacation length	2017 (%)	2018 (%)
1 - 2 NIGHTS	29.31	27.03
3 - 4 NIGHTS	41.81	48.56
5 - 6 NIGHTS	18.1	14.11
MORE THAN 7 DAYS AND LESS THAN A MONTH	9.48	8.61
A MONTH OR MORE	1.29	1.20

Principal mean of transportation in the destination

The increase of the offer of local means of transportation is shown in the survey during this vacation time. Either cabs or Uber services appear with more than 11% each one, less than the public transportation or own cars options.

Activities performed

Contracting leisure activities represents a low percentage among the people polled; this does not vary significantly from last year to this year.

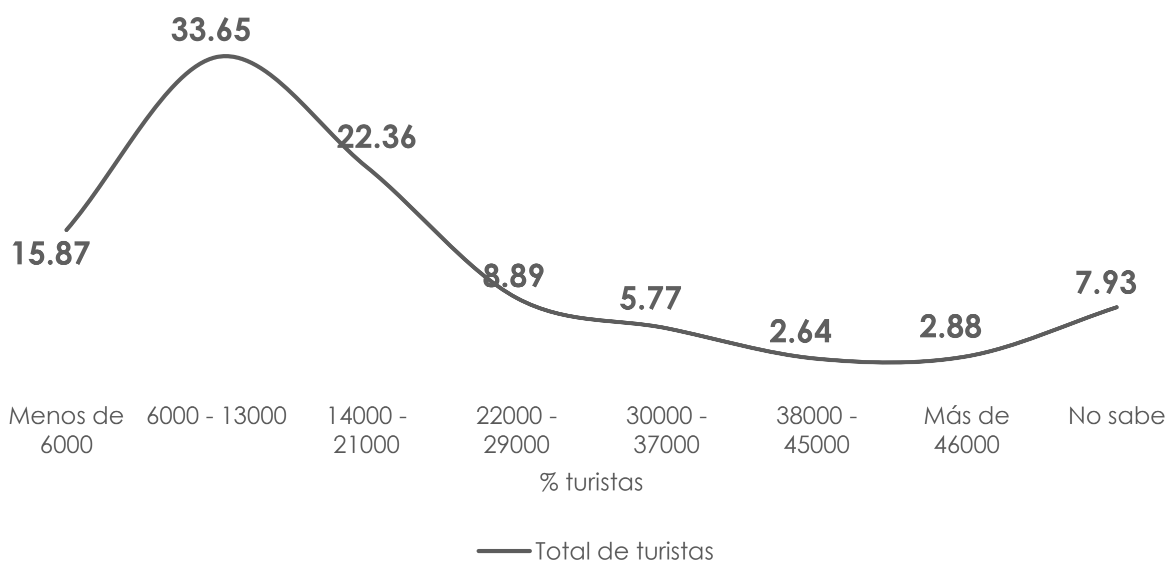


In the comparative of the activities with the highest demand by the domestic market, the boat tours and the city tour are the ones mentioned the most; being the scuba diving activity the one increasing as a leisure activity for the domestic market.

	2017	2018
Boat tour	60.61%	59.70%
City tour	33.33%	40.30%
Scuba diving	3.03%	11.94%

Total cost of the trip

The total cost of the trip including all of the people who join you is mostly between 6,000 and 13,000 Mexican pesos; then 14,000 to 21,000 Mexican pesos. It is notable to mention that more than 15% of the people polled make sure to spend as a total less than 6,000 Mexican pesos, which can correspond to the segments with less incomes according to the estimate previously mentioned.



Compared to last year, there are not significant variations to the total expenses of the trip, taking into consideration economic indicators such us inflation and currency depreciation.

Total cost of the trip (Mexican currency)	2017	2018
LESS THAN 6000	23.28	15.79%
6000 - 13000	27.59	33.49%
14000 - 21000	24.14	22.25%
22000 - 29000	15.52	8.85%
30000 - 37000	3.45	5.74%
38000 - 45000	1.29	2.63%
MORE THAN 46000	0.86	2.87%
UNKNOWN	3.88	7.89%

Traveling with pets

DO YOU TRAVEL WITH PETS?	2017	2018
YES	2.58%	6.94%
NO	97.42%	93.06%

The percentage of the people who travel with their pets is evident from the previous year to this year. This might result very obvious because of the increase of the demand for pet friendly accommodation by the domestic market.

Do you travel with people with disabilities?

Traveling with people with disabilities is becoming more and more usual, compared to last year, an increase of 5 percentage points is observed in this survey. Because of this, focusing on improving the infrastructure as well as the diversification of the touristic offer of the region becomes a very important issue for the destination.

TRAVELING WITH PEOPLE WITH DISABILITIES	2017	2018
YES	2.58%	7.89%
NO	97.42%	92.11%

V. Organization and ways of getting to know the destination

Time in advance to plan the trip

The time in advance to plan the trip is polarized by those who do it in less than 5 days (21.6%) and those who do it in 1 or 2 months (27.8%).

	2017	2018
Less than 5 days	26.29%	21.63%
1 - 2 weeks	12.93%	19.95%
3 - 4 weeks	16.81%	12.26%
From 1 to 2 months	26.29%	27.88%
3 to 4 months	10.78%	10.58%
More than 5 months	6.47%	6.97%
Other	0.43%	0.72%

Loyalty to the destination

The rate of return to the destination is high since it is shown that around 40% of the people polled mentions that they visit it once or twice a year.

	2017	2018
First time	41.80%	38.70%
Once or twice a year	41.81%	38.46%
3 or 4 times a year	11.21%	11.78%
More than 5 times a year	1.72%	1.20%
Every 2 or 3 years	2.59%	7.69%
Other	0.86%	2.16%

Means of communication the destination is known for.

Means of communication by the level of incomes

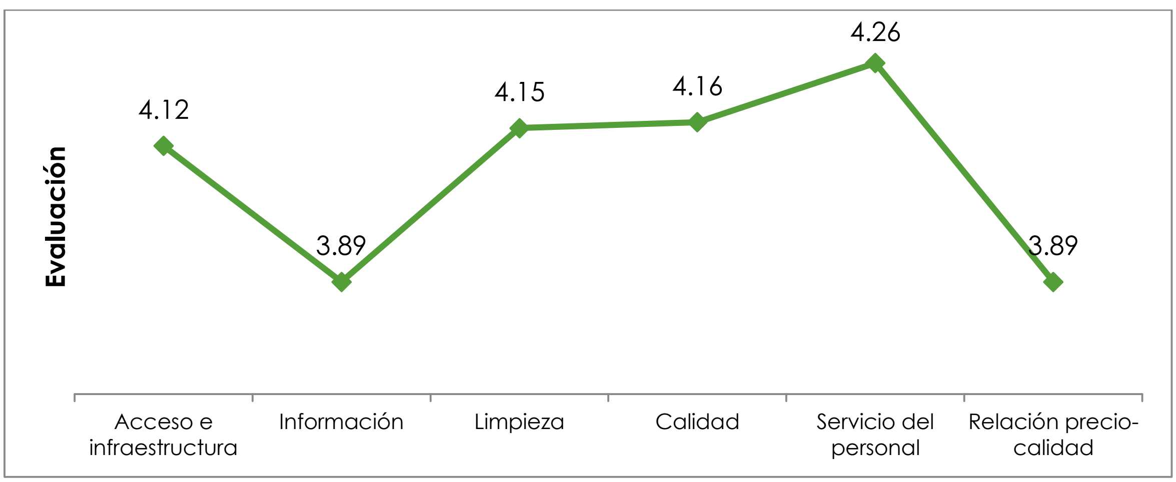
	Menos de 3,399	3,400 - 8,500	8,600 - 11,699	11,700 - 14,699	14,700 - 44,299
Last visit	44.12%	51.76%	50.00%	57.89%	61.43%
Internet	32.35%	29.41%	28.38%	18.42%	24.29%
Magazines	-	-	-	-	-
Newspapers	-	-	-	-	-
By word of mouth	20.59%	18.82%	16.22%	23.68%	8.57%
TV	-	-	1.35%	-	4.29%
Other	2.94%	-	4.05%	-	1.43%

VI. Expectations and evaluation of the destination

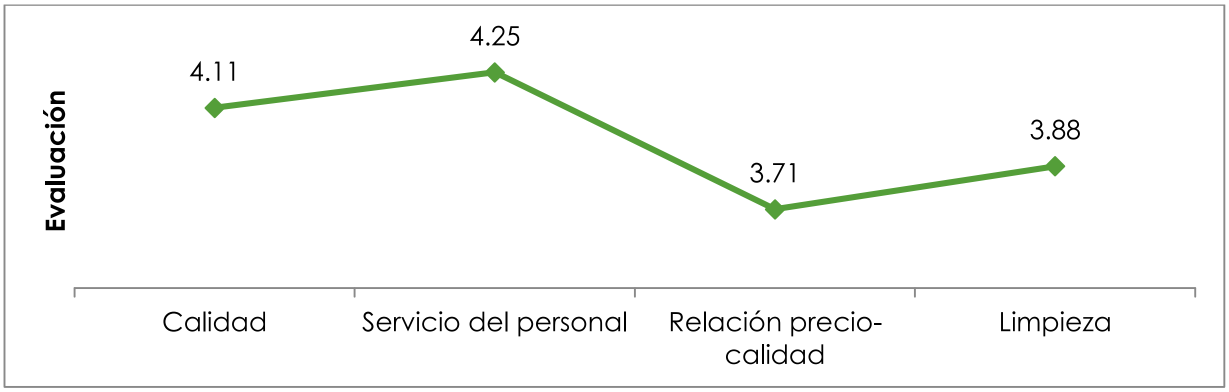
Evaluation of products and services

The evaluation of the accommodation, leisure activities and food establishments is normally positive. To evaluate this variable, a Likert scale is used in which 5 is the highest point. In the following charts, it is observed that in general terms, the results of the evaluation is normally "good" or "very good".

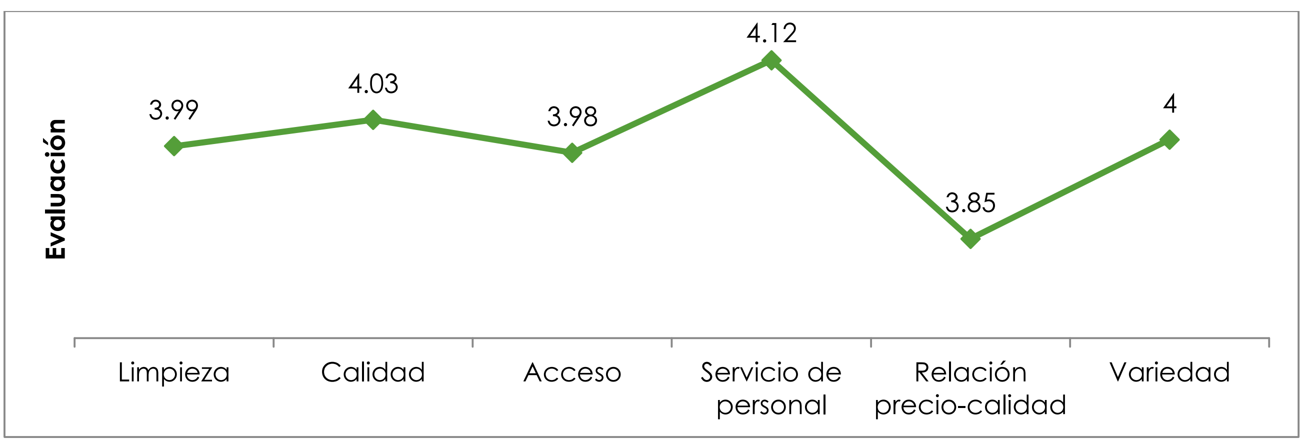
Accommodation



Leisure activities

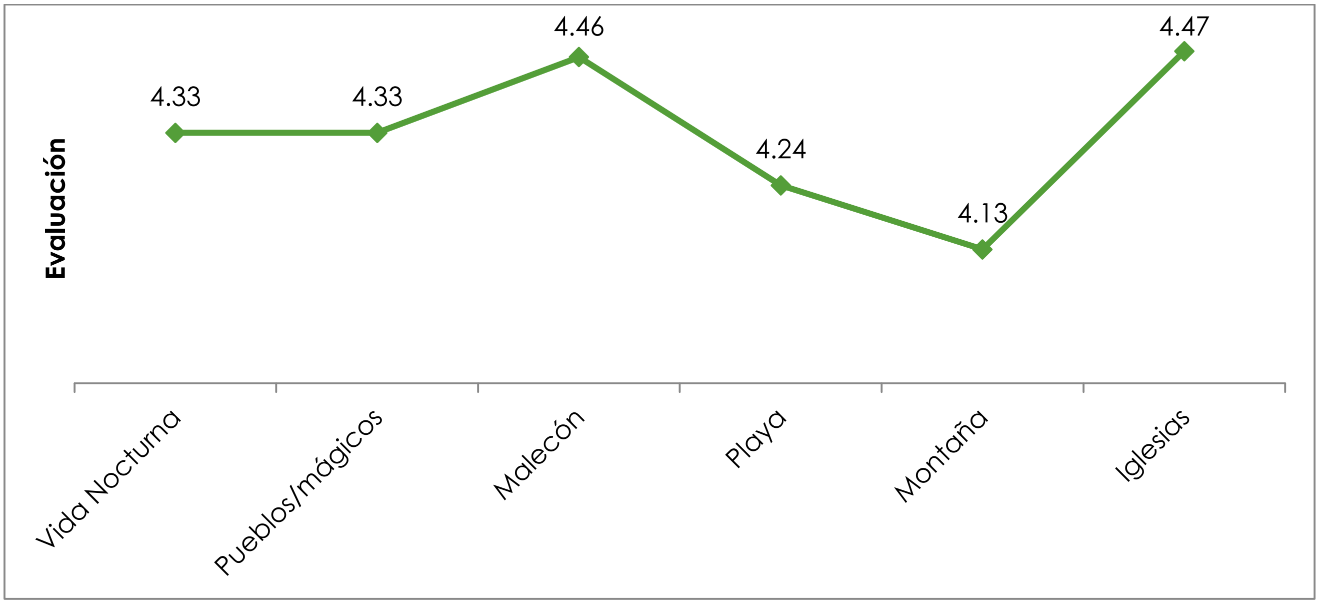


Food establishments



Visited attractions

Very similar to the services, the evaluation of visited attractions is positive, since most of the people polled pointed them out as "good" or "very good", being the highlights "the churches" and the "malecón" (boardwalk).



General evaluation of the destination

EVALUATION	2017	2018
TOO BAD	0	0.00%
BAD	0	0.24%
AVERAGE	16.81	8.61%
GOOD	65.95	44.26%
VERY GOOD	17.24	46.41%

Observatorio Integral de la Región Turística

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