Guam Visitors Bureau
Russian Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

QTR1 (OCTOBER 2016-DECEMBER 2016)

Prepared by: Anthology Research

VISIT GUAM 2017 YEAR of LOVE

[ANTHOLOGY]
AnthologyGroup.com

GUAM VISITORS BUREAU
SETBISION BISITAN GUÅHAN

GUAM

Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Russian speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.

- A total of **82** departing Russian 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 **82** is +/- 10.82 percentage points with a 95% confidence level. That is, if all Russian 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 +/- 10.82 percentage points.
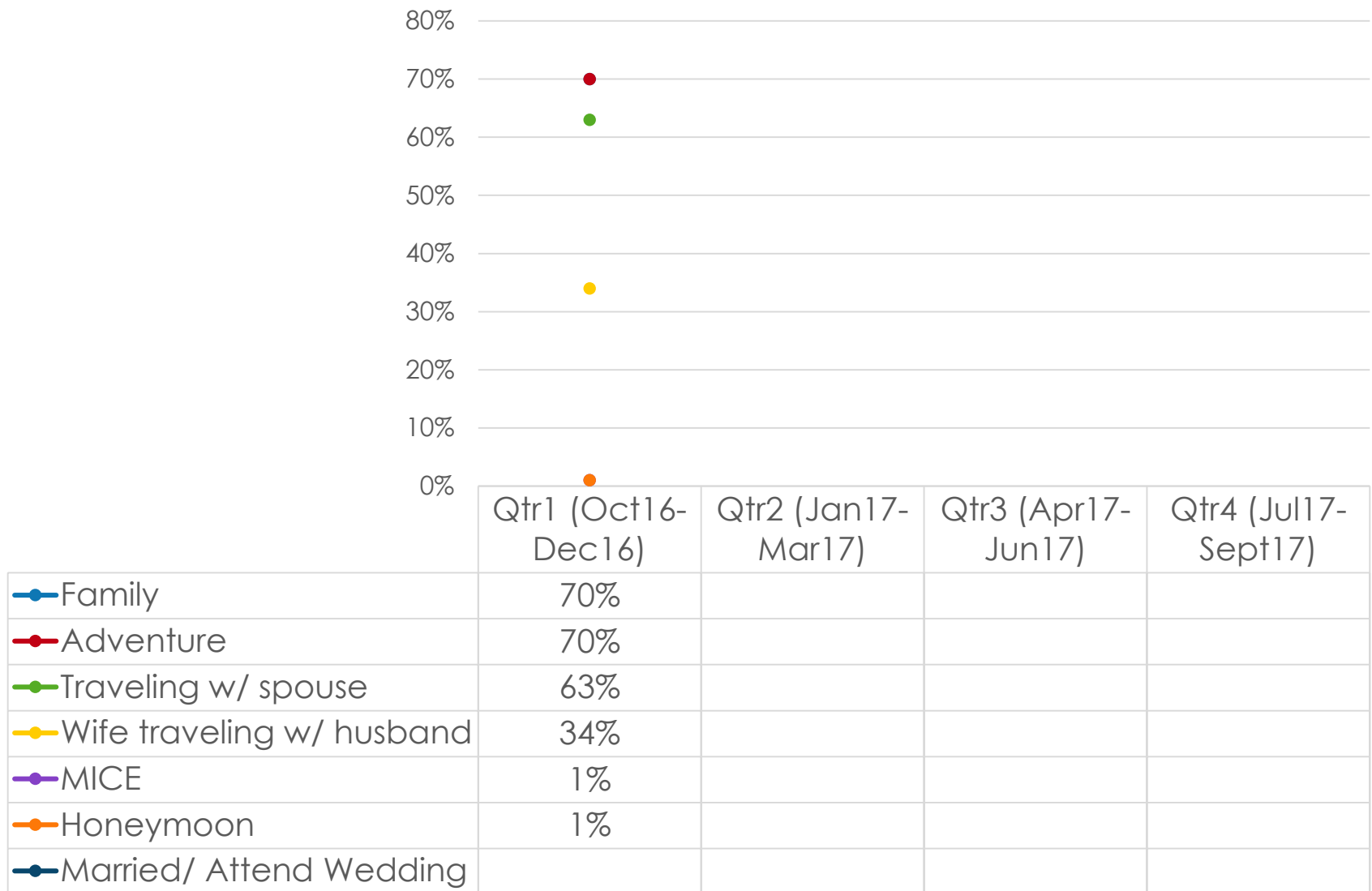
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Objectives

- To monitor the effectiveness of the Russian seasonal campaigns in attracting Russian visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Russian marketing plan.

- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

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Key Highlighted Segments

- **The specific objectives were:**

  - To determine the relative size and expenditure behavior of the following market segments:
    - Family (Q6)
    - Adventure Traveler (Q5A Scuba/ Water sports, Q18 Skydiving, Q19 Scuba, snorkeling, Windsurfing)
    - Wife traveling with husband (Gender- Male, Q6 Traveling with spouse)
    - Traveling with Spouse (QE- Married)
    - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)
    - Honeymoon (Q5A)
    - Wedding (Q5A)

  - To identify the most significant factors affecting overall visitor satisfaction.

  - To identify (for all Russian visitors) the most important determinants of on-island spending
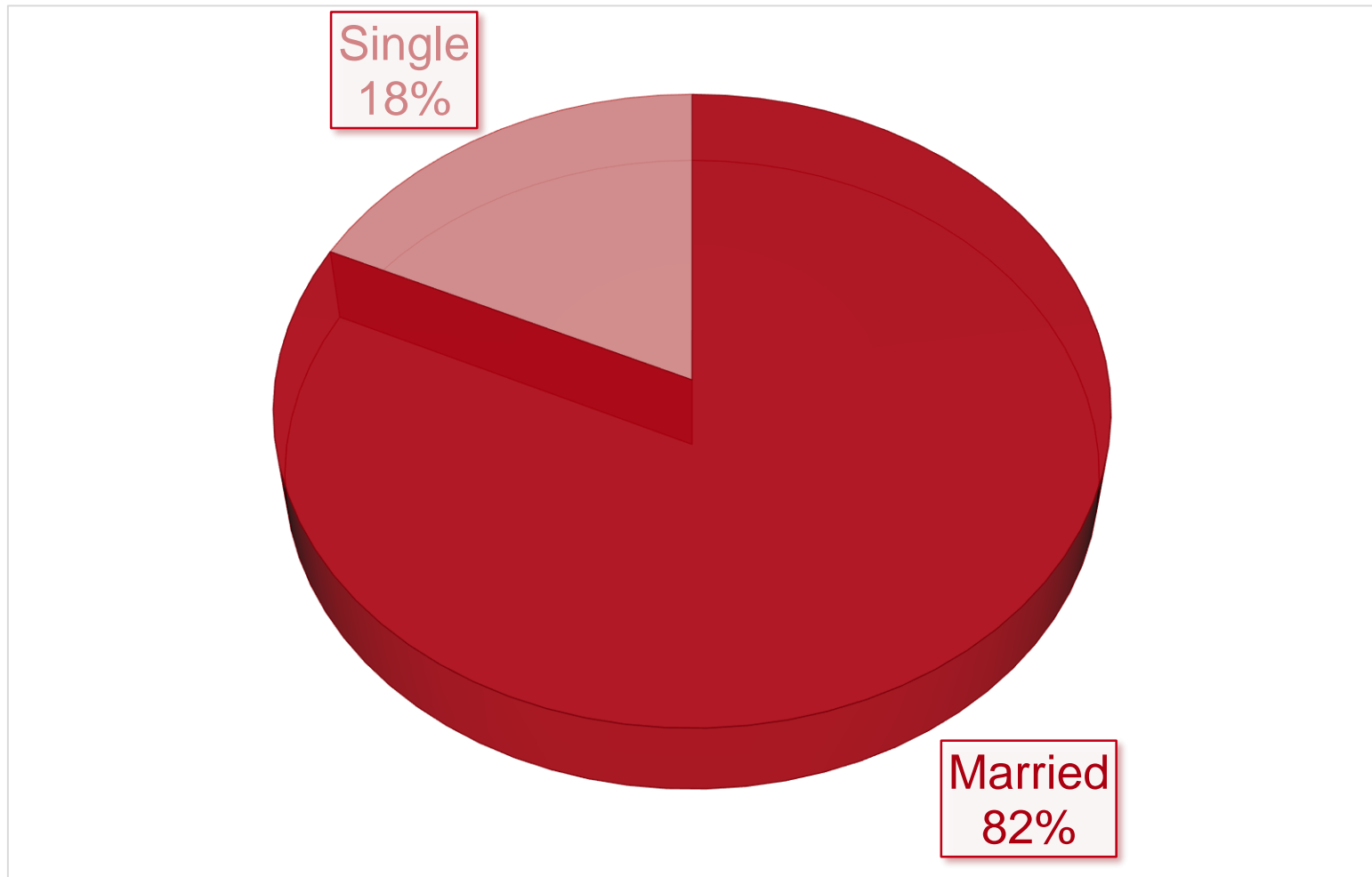
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Key Highlighted Segments

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
Family	70%			
Adventure	70%			
Traveling w/ spouse	63%			
Wife traveling w/ husband	34%			
MICE	1%			
Honeymoon	1%			
Married/ Attend Wedding				

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SECTION 1
PROFILE OF RESPONDENTS

[A]

Marital Status

Single
18%

Married
82%

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Marital status – FY2017 Tracking
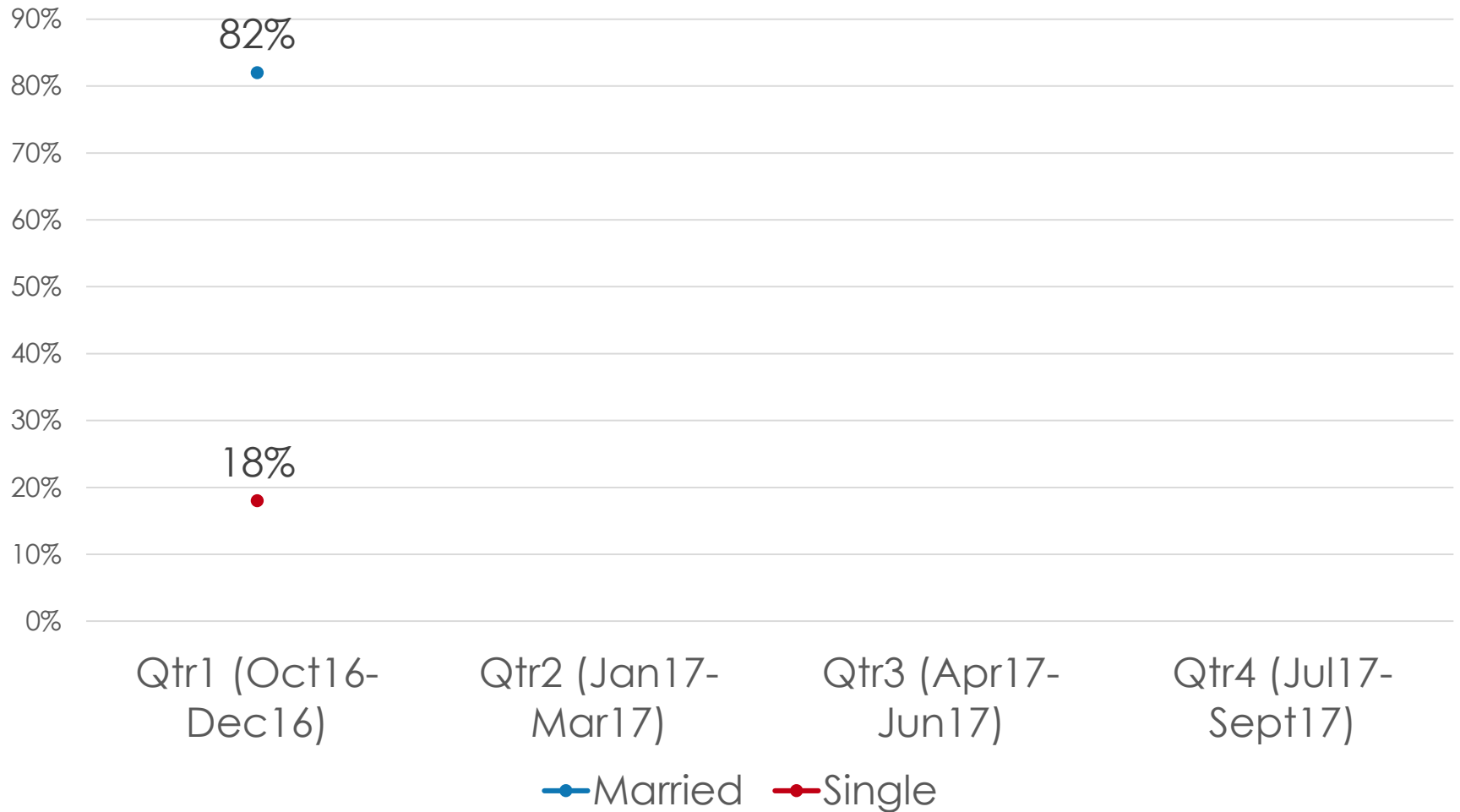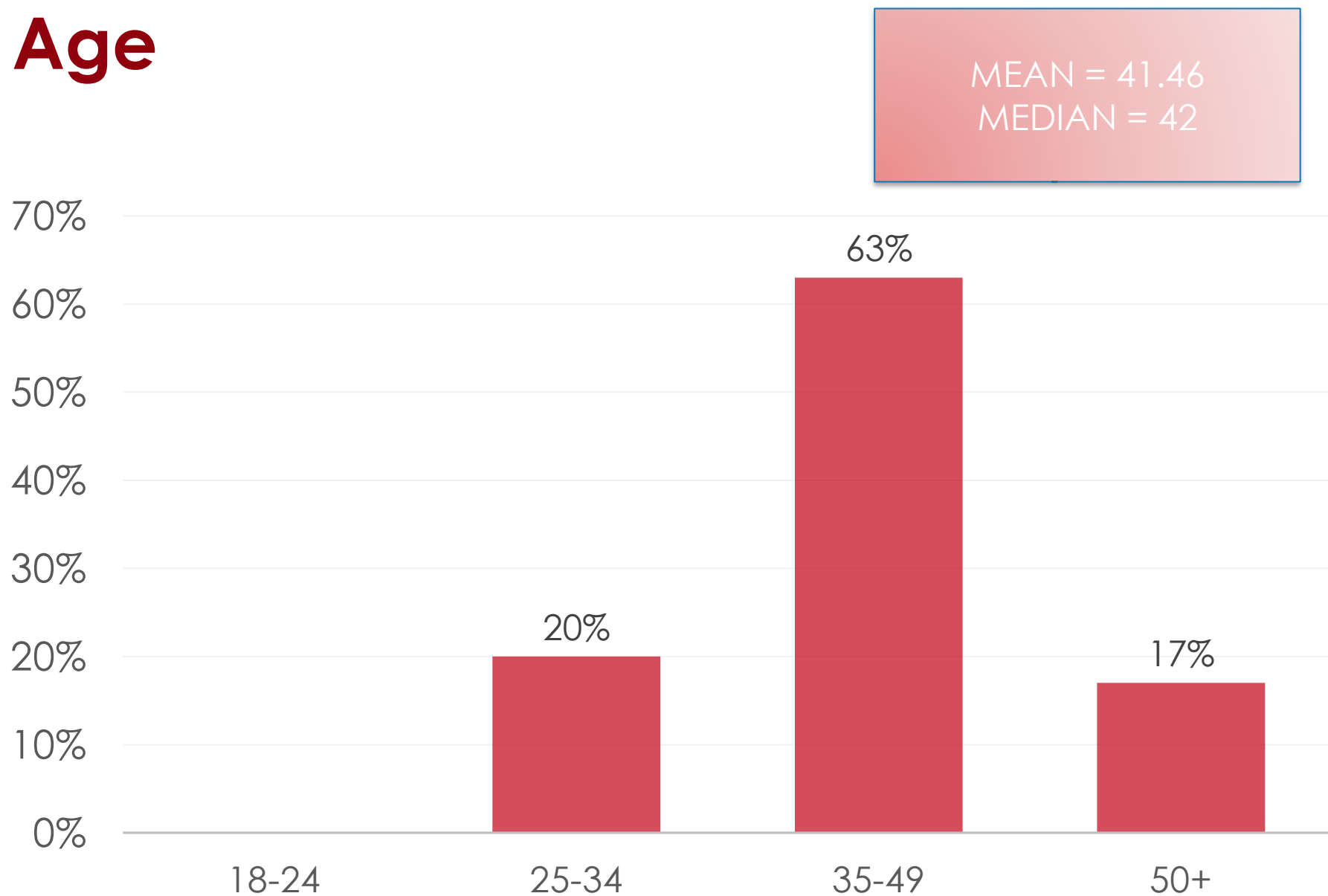
Marital status – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

QE Are you married or single?

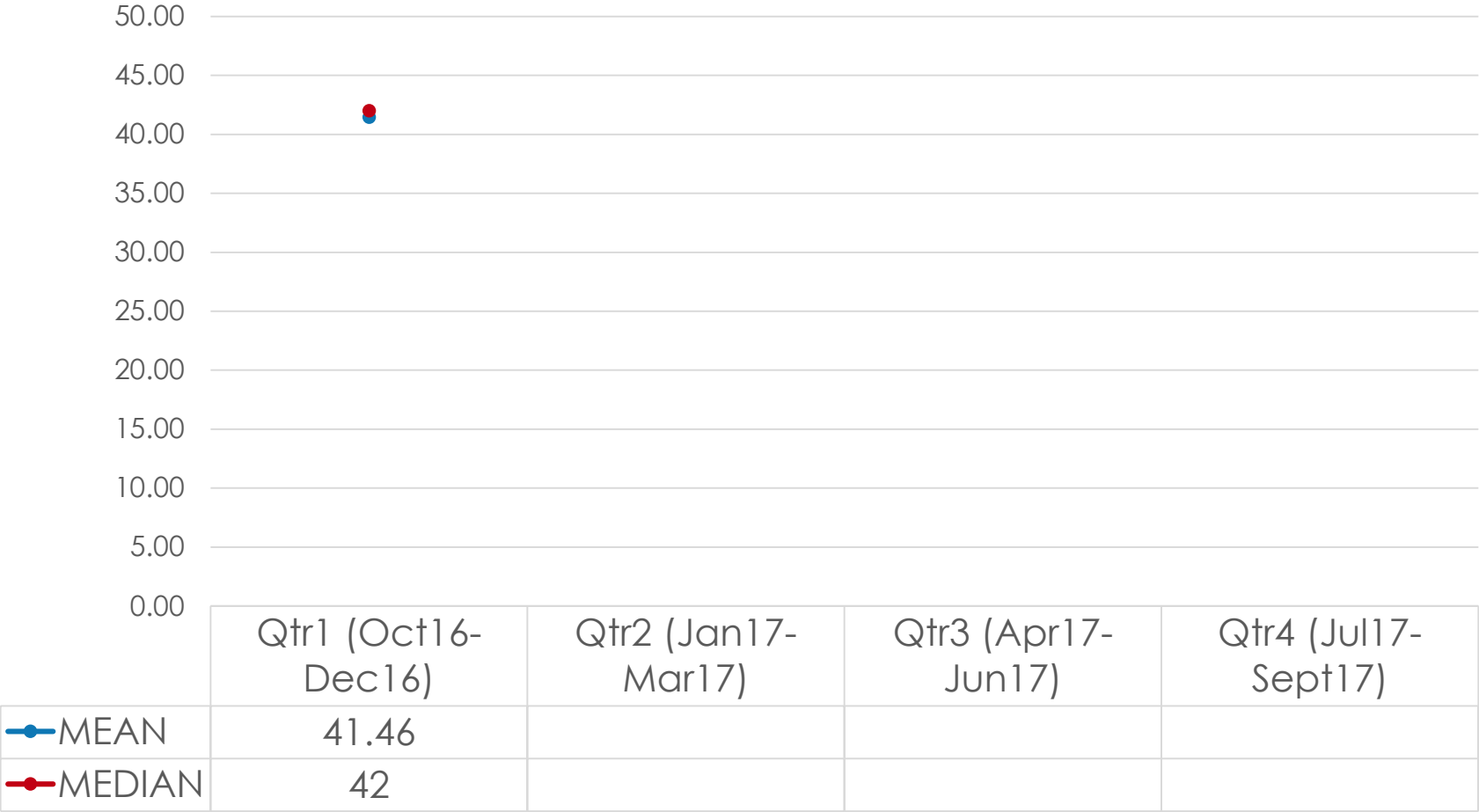|		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
QE	Married	82%	98%	100%	98%	100%	100%	79%
	Single	18%	2%		2%			21%
	Total	82	57	28	52	1	1	57

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Age

MEAN = 41.46
MEDIAN = 42

70%
60%
50%
40%
30%
20%
10%
0%

63%

20%

17%

18-24   25-34   35-49   50+

[A]

Age – FY2017 Tracking

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	41.46			
MEDIAN	42			

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Age – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

QF And what was your age on your last birthday?

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
QF	25-34	20%	18%	7%	15%		100%	21%
	35-49	63%	67%	71%	71%	100%		67%
	50+	17%	16%	21%	13%			12%
	Total	82	57	28	52	1	1	57
QF	Mean	41.46	41.44	43.89	41.38	35.00	25.00	40.56
	Median	42	41	44	42	35	25	39

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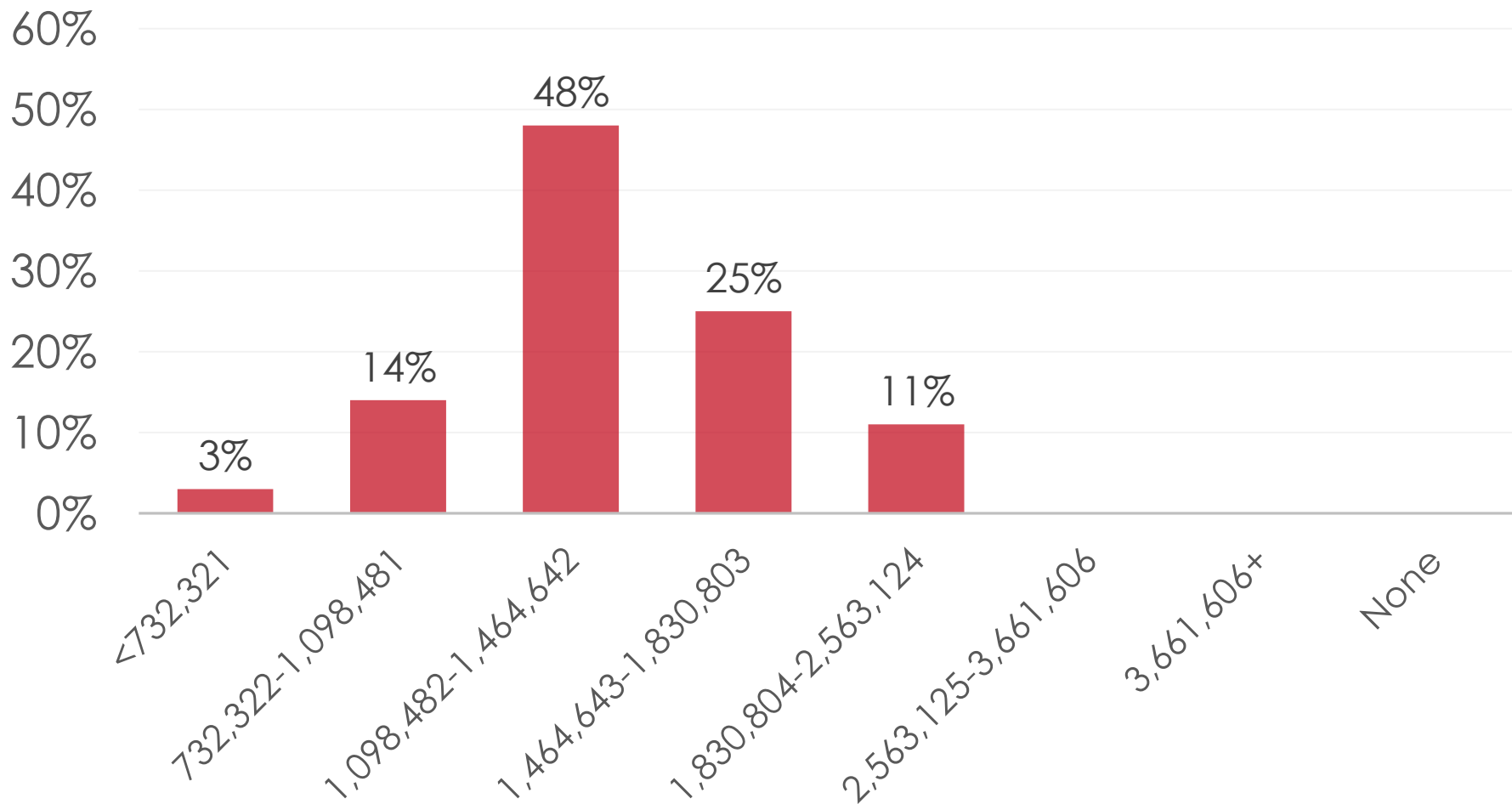
Annual Household Income

EXCHANGE RATE RUBLES 63.20=$1

Annual Household Income (% of respondents):
- <732,321: 3%
- 732,322-1,098,481: 14%
- 1,098,482-1,464,642: 48%
- 1,464,643-1,830,803: 25%
- 1,830,804-2,563,124: 11%
- 2,563,125-3,661,606: 0%
- 3,661,606+: 0%
- None: 0%

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Annual Household Income

EXCHANGE RATE RUBLES 63.20=$1

■ 1st Time ■ Repeat

Income	1st Time	Repeat
<732,321	3%	
732,322-1,098,481	13%	15%
1,098,482-1,464,642	48%	45%
1,464,643-1,830,803	27%	20%
1,830,804-2,563,124	8%	20%
2,563,125-3,661,606		
3,661,606+		
None		
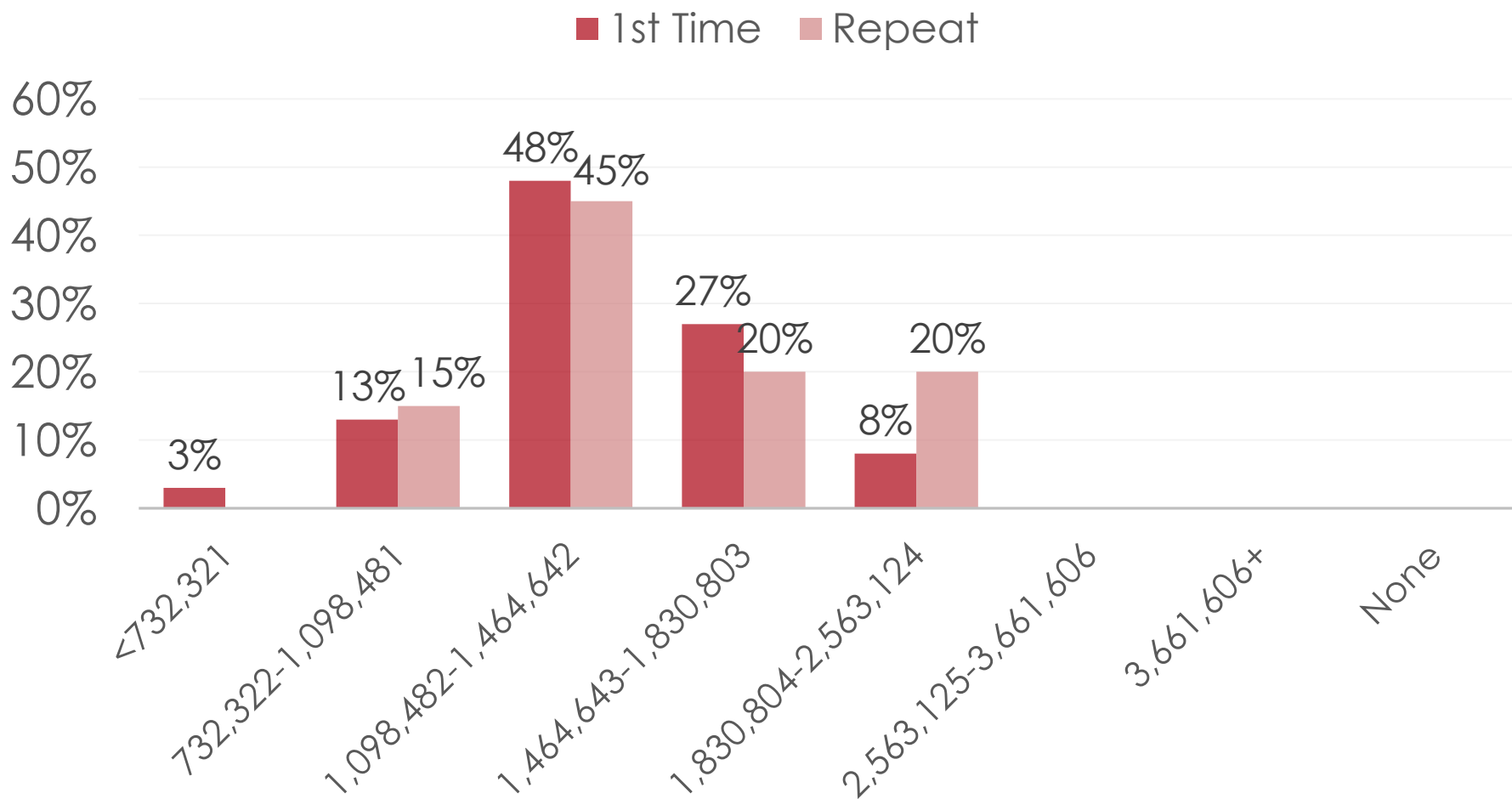
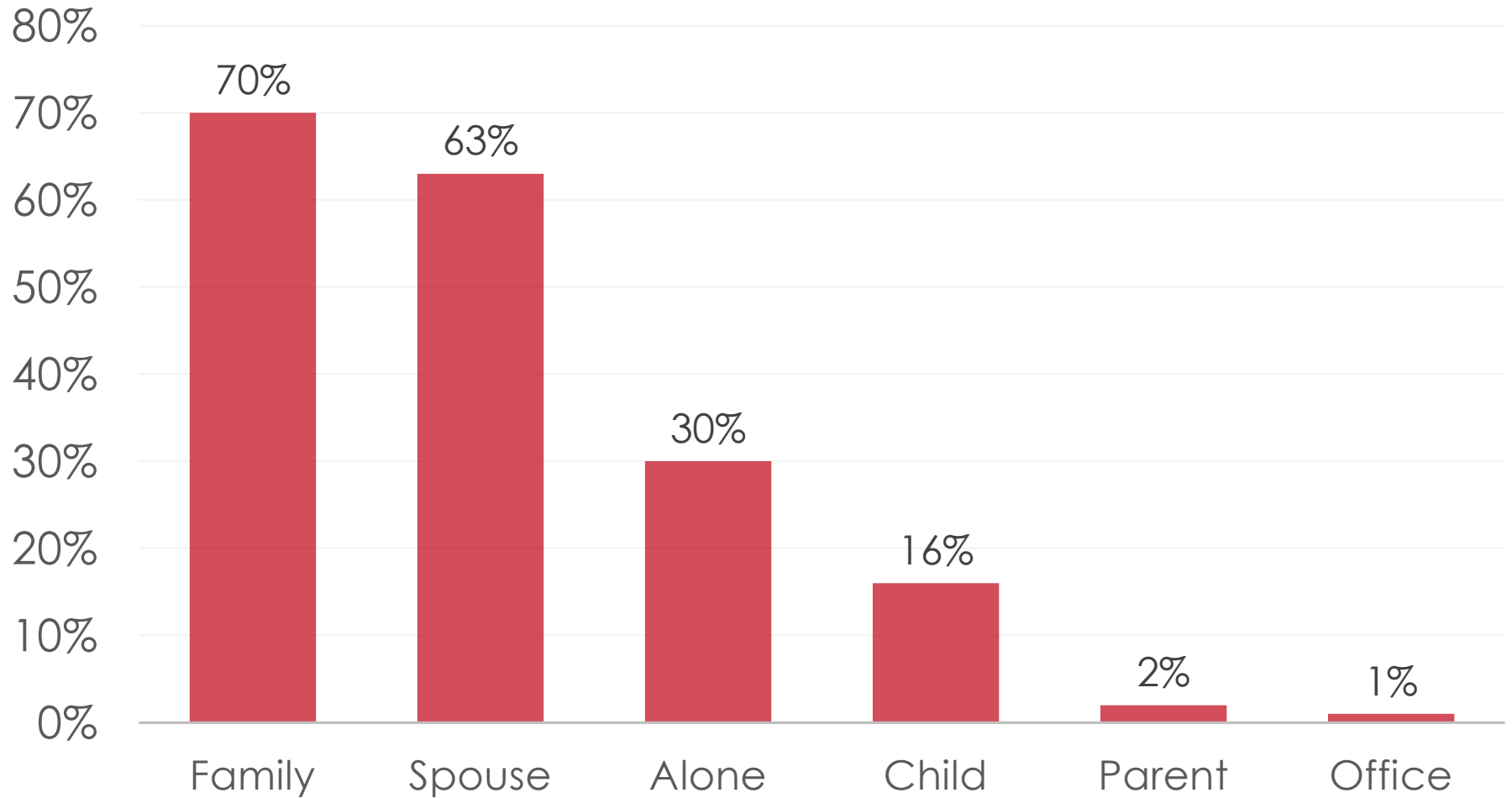# Annual Household Income – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q27 What is your approximate annual household income before taxes?

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
Q27	<732,321	3%	2%	4%	2%			2%
	732,321-1,098,481	14%	5%	7%	6%	100%		11%
	1,098,482-1,464,642	48%	48%	41%	43%		100%	51%
	1,464,643-1,830,803	25%	30%	33%	33%			26%
	1,830,803-2,263,124	11%	14%	15%	16%			11%
	Total	80	56	27	51	1	1	57

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Travel Party

Travel Party - Children

N = 13
16% TRAVELING WITH A CHILD

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Trips to Guam

Repeat 26%

First time 74%

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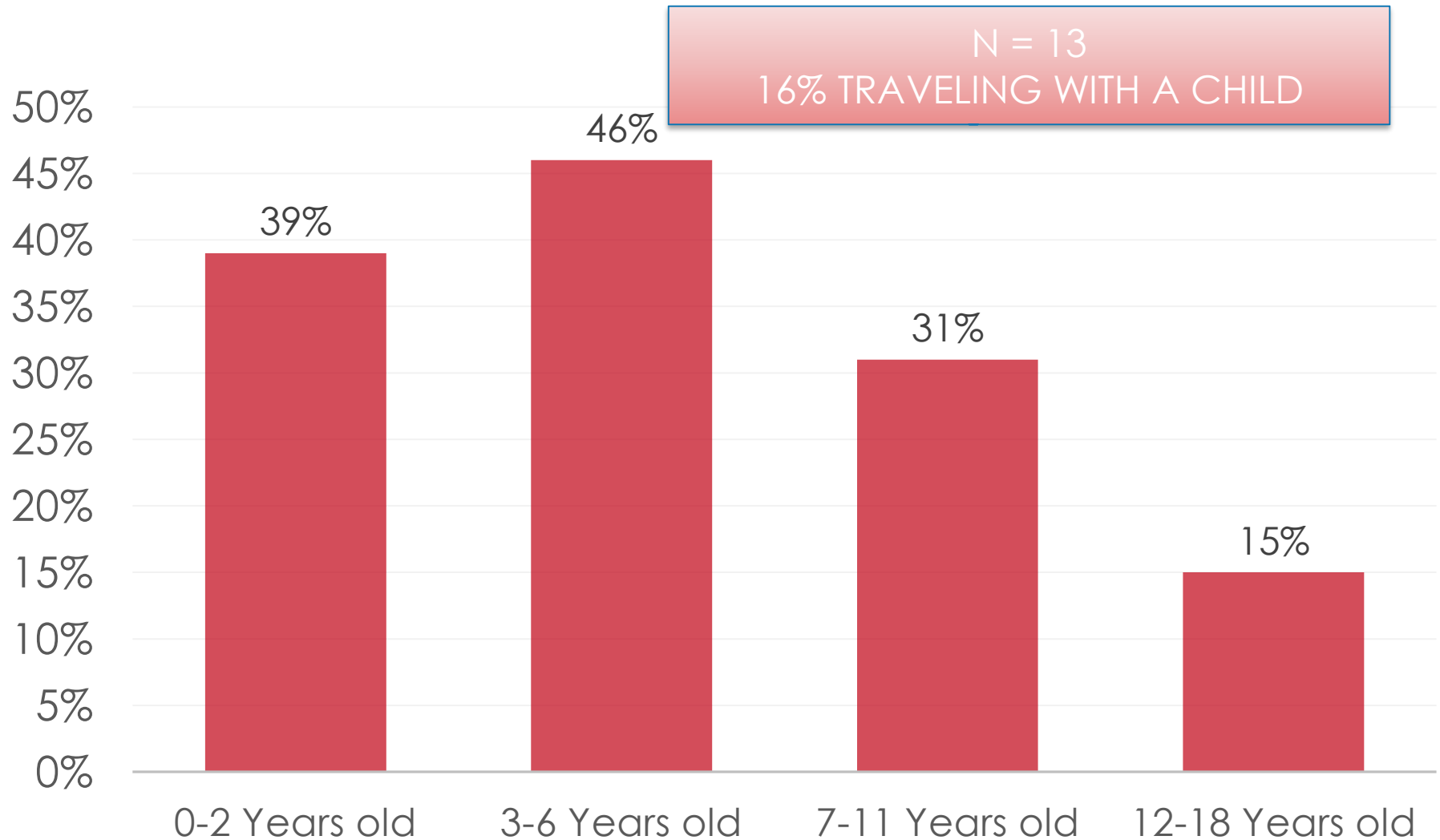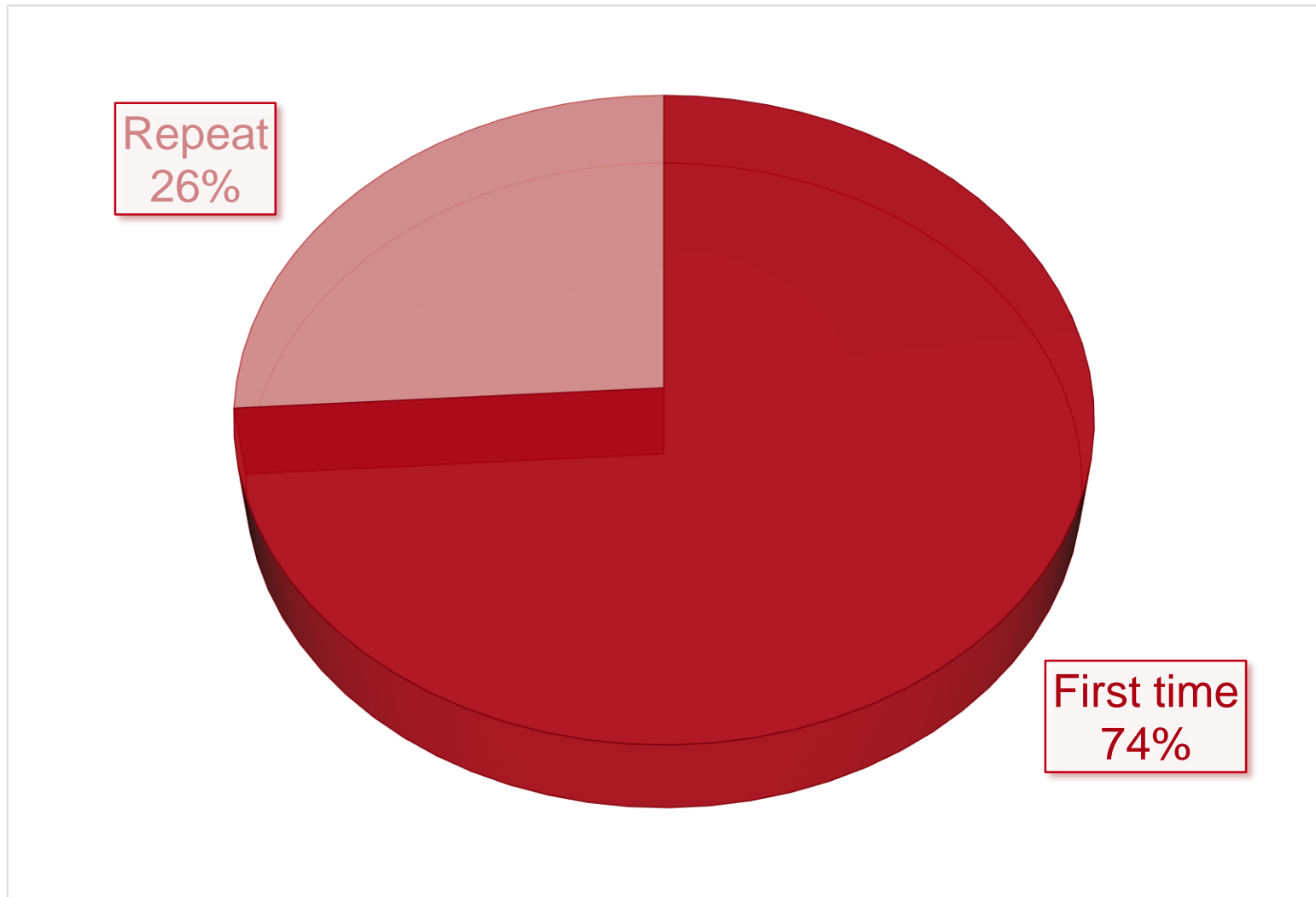
Trips to Guam – FY2017 Tracking

Chart showing percentage of First and Repeat trips to Guam by quarter.

Y-axis: 0% to 80% in 10% increments.

X-axis: Qtr1 (Oct16-Dec16), Qtr2 (Jan17-Mar17), Qtr3 (Apr17-Jun17), Qtr4 (Jul17-Sept17)

Qtr1 (Oct16-Dec16): First = 74%, Repeat = 26%

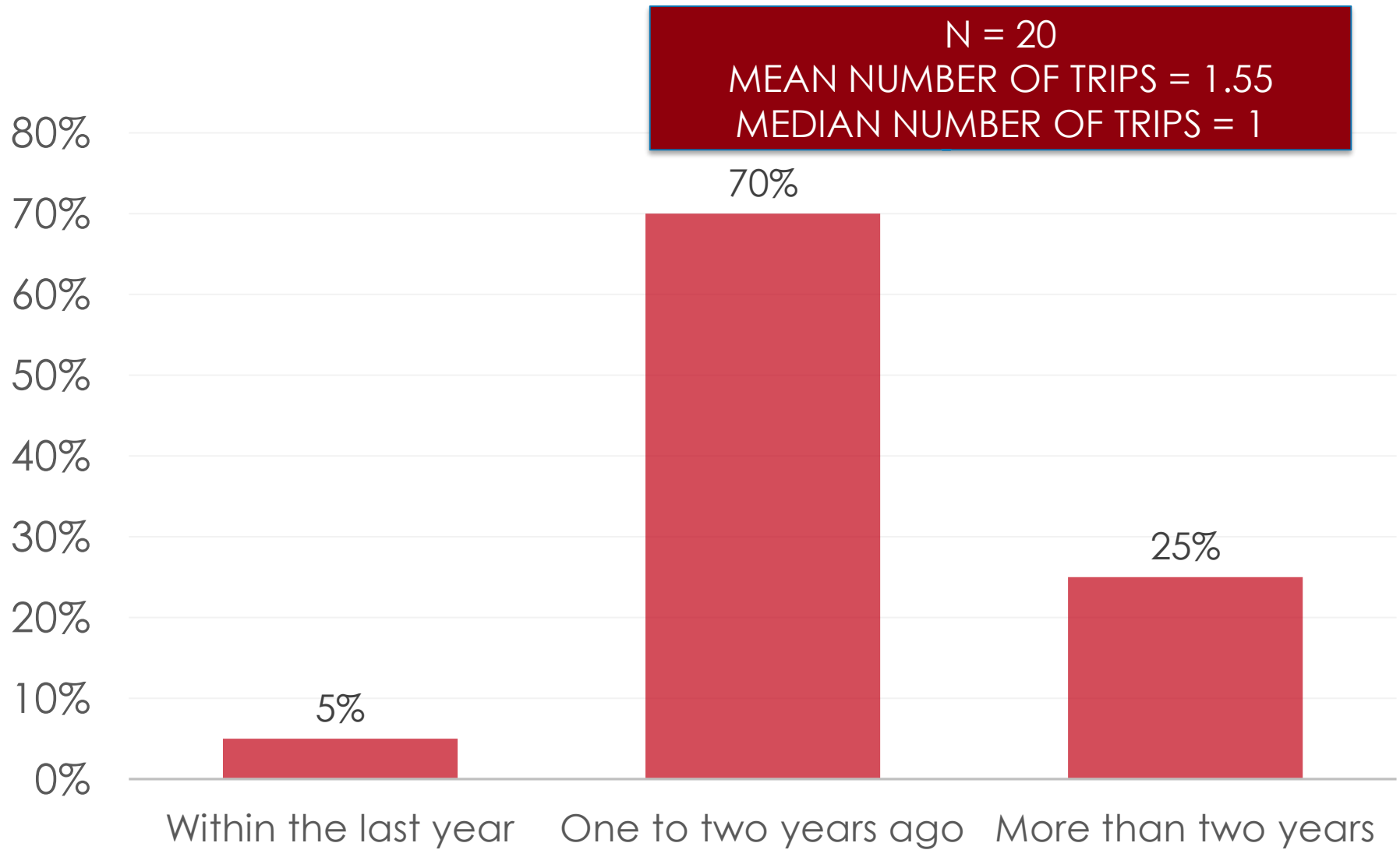Legend: First, Repeat
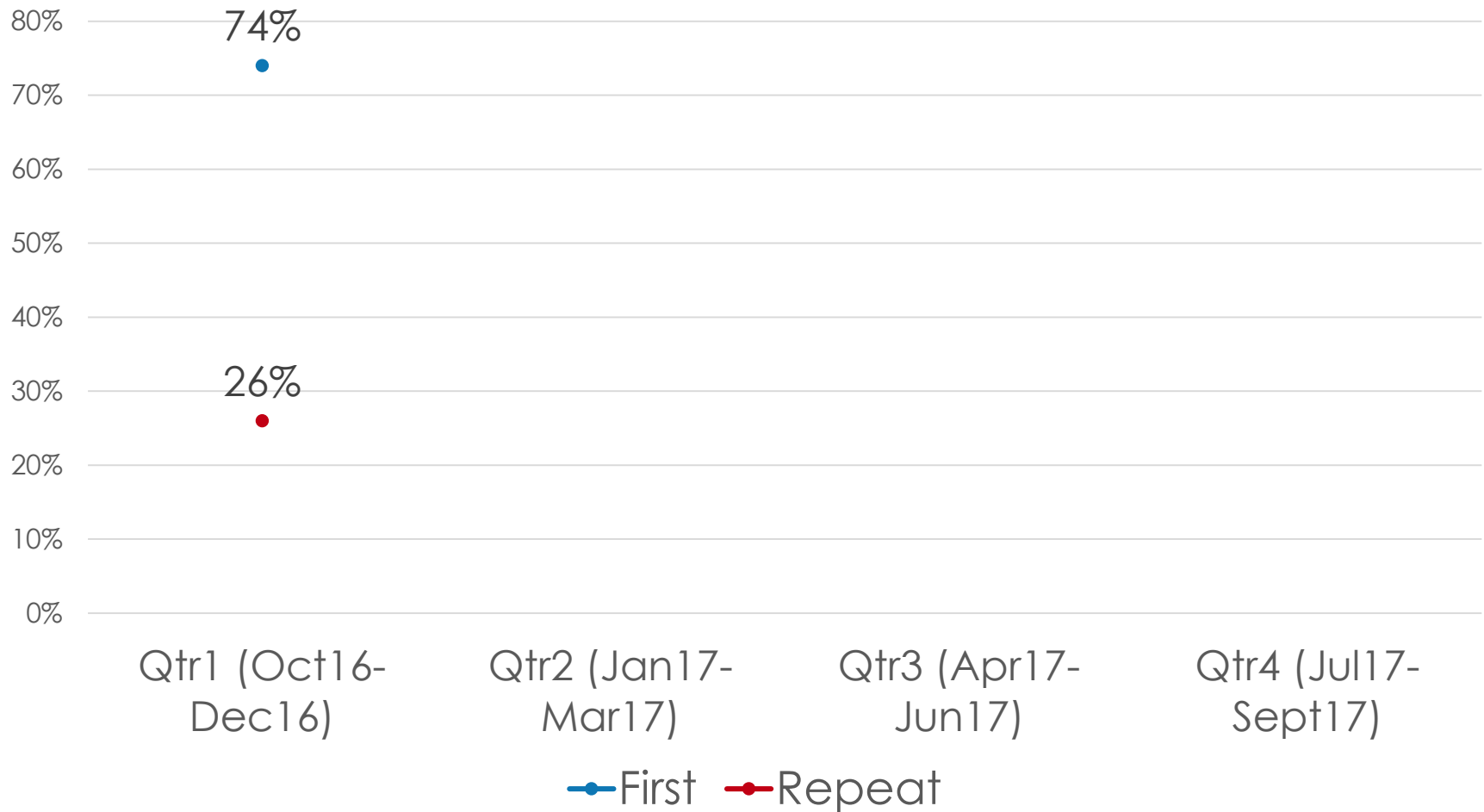
Trips to Guam – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q3A Is this your first trip to Guam?

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
Q3A	Yes	74%	70%	71%	71%	100%	100%	79%
	No	26%	30%	29%	29%			21%
	Total	82	57	28	52	1	1	57

Prepared by QMark Research

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Repeat Visitor- Most Recent Trip

N = 20
MEAN NUMBER OF TRIPS = 1.55
MEDIAN NUMBER OF TRIPS = 1

- Within the last year: 5%
- One to two years ago: 70%
- More than two years: 25%

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Length of Stay

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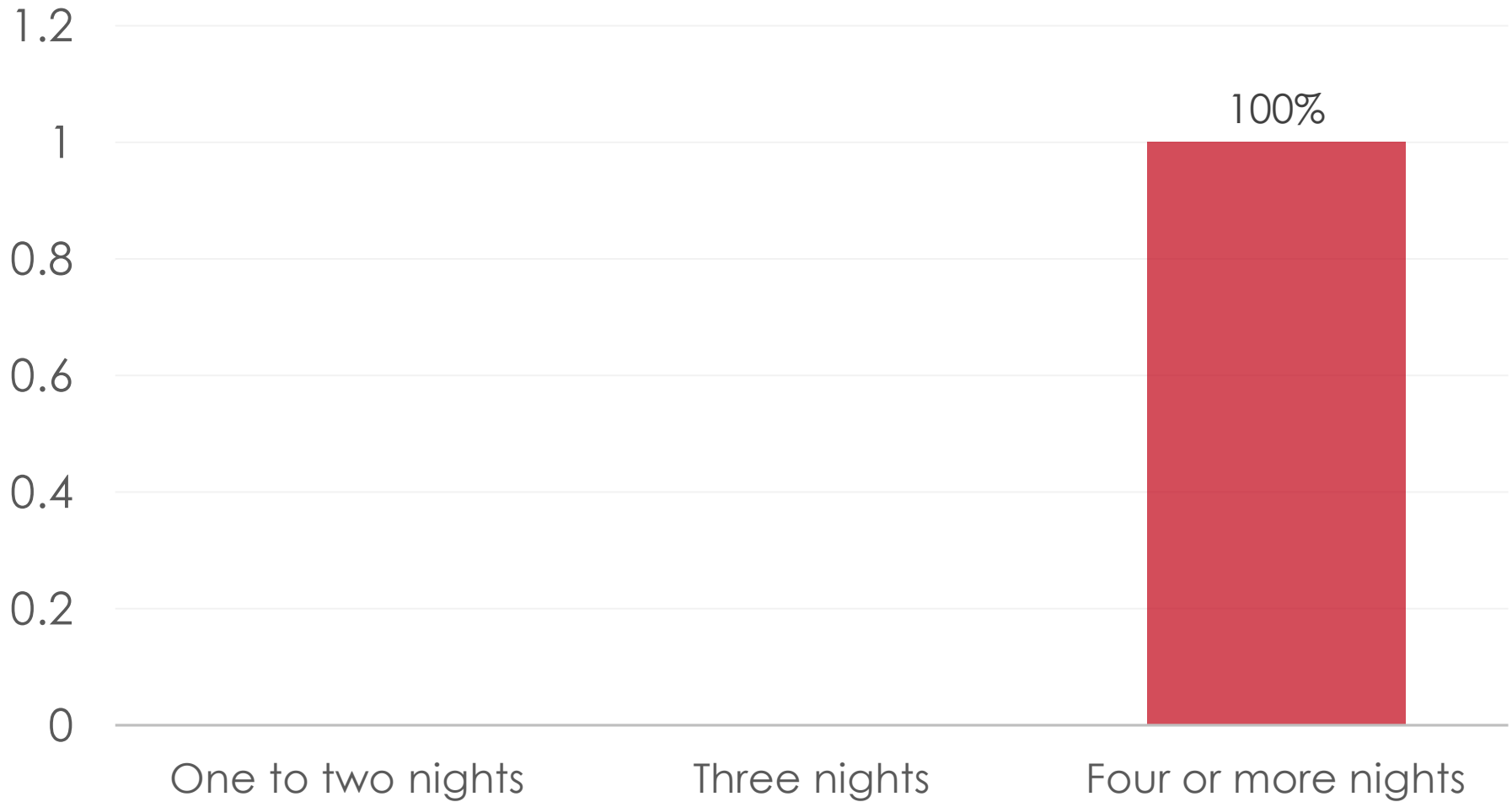
Length of Stay – FY2017 Tracking

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	8.68			
MEDIAN	8			

[A]
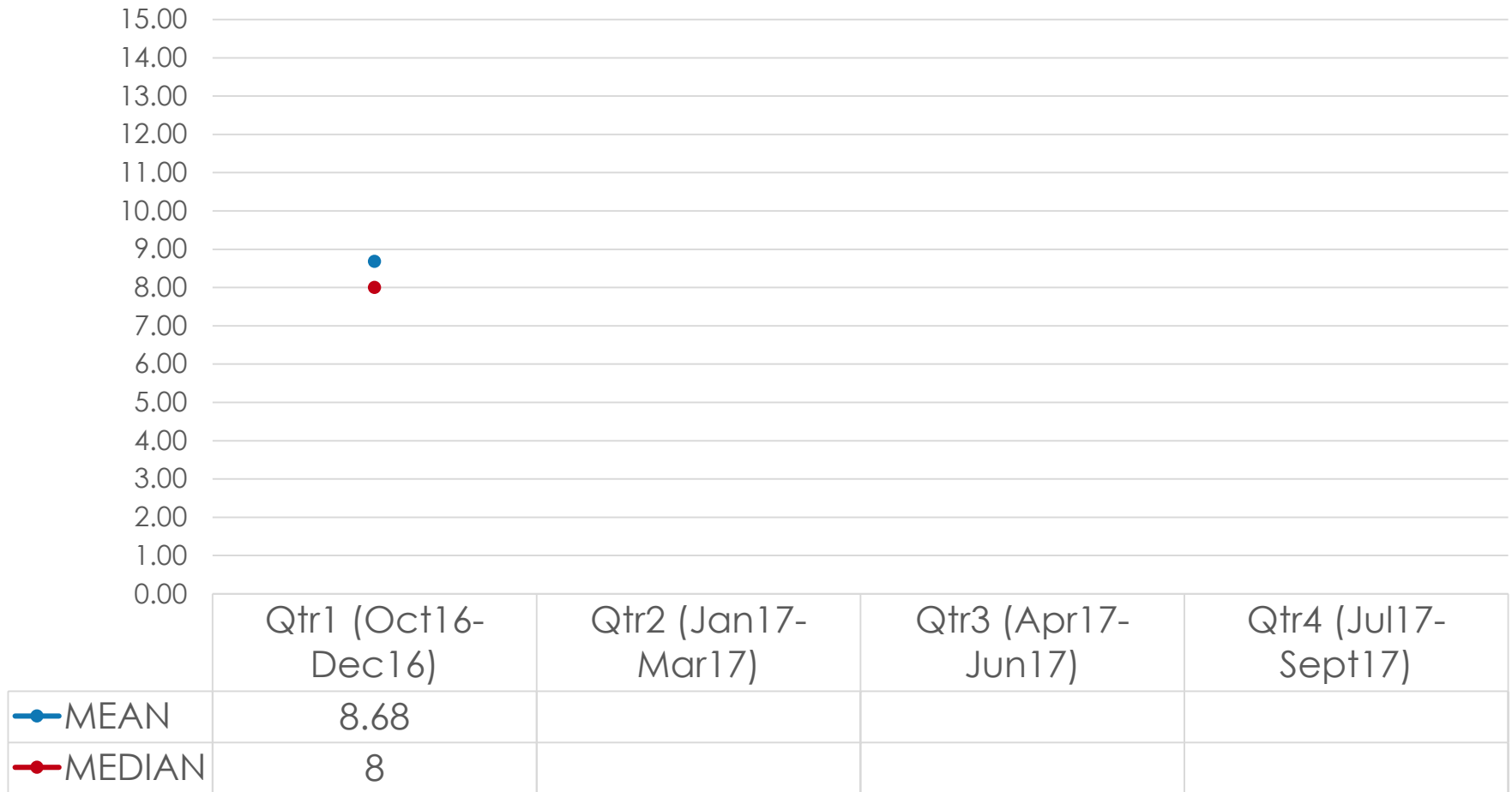
Length of Stay – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q8 How many nights did you stay on Guam?

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
Q8	4+	100%	100%	100%	100%	100%	100%	100%
	Total	82	57	28	52	1	1	57
Q8	Mean	8.68	8.96	8.79	9.10	5.00	9.00	8.44
	Median	8	9	9	9	5	9	8

Prepared by QMark Research

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Occupation – Top Responses (10%+)

Bar chart:
- Self-employed: 24%
- Company: Manager: 19%
- Govt: Office/ Non-mgr: 14%
- Company: Office/ Non-mgr: 11%
- Prof/ Specialist: 10%
- Govt: Manager: 10%

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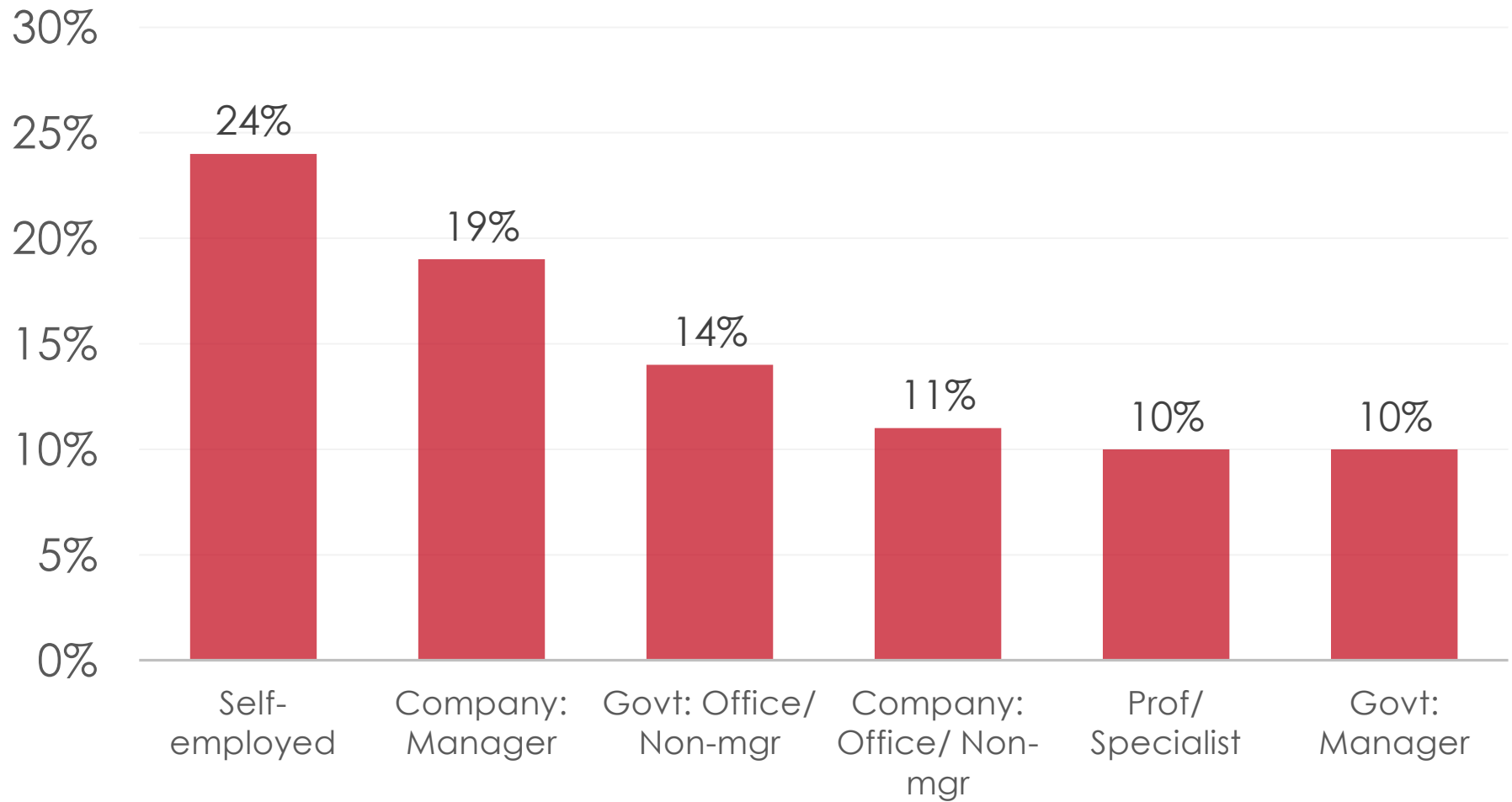
SECTION 2
TRAVEL PLANNING

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Travel Planning

Bar chart showing Travel Planning percentages: FIT 93%, Free-time pkg tour 4%, Full pkg tour 2%, Company Sponsor 1%, Group tour 0%.

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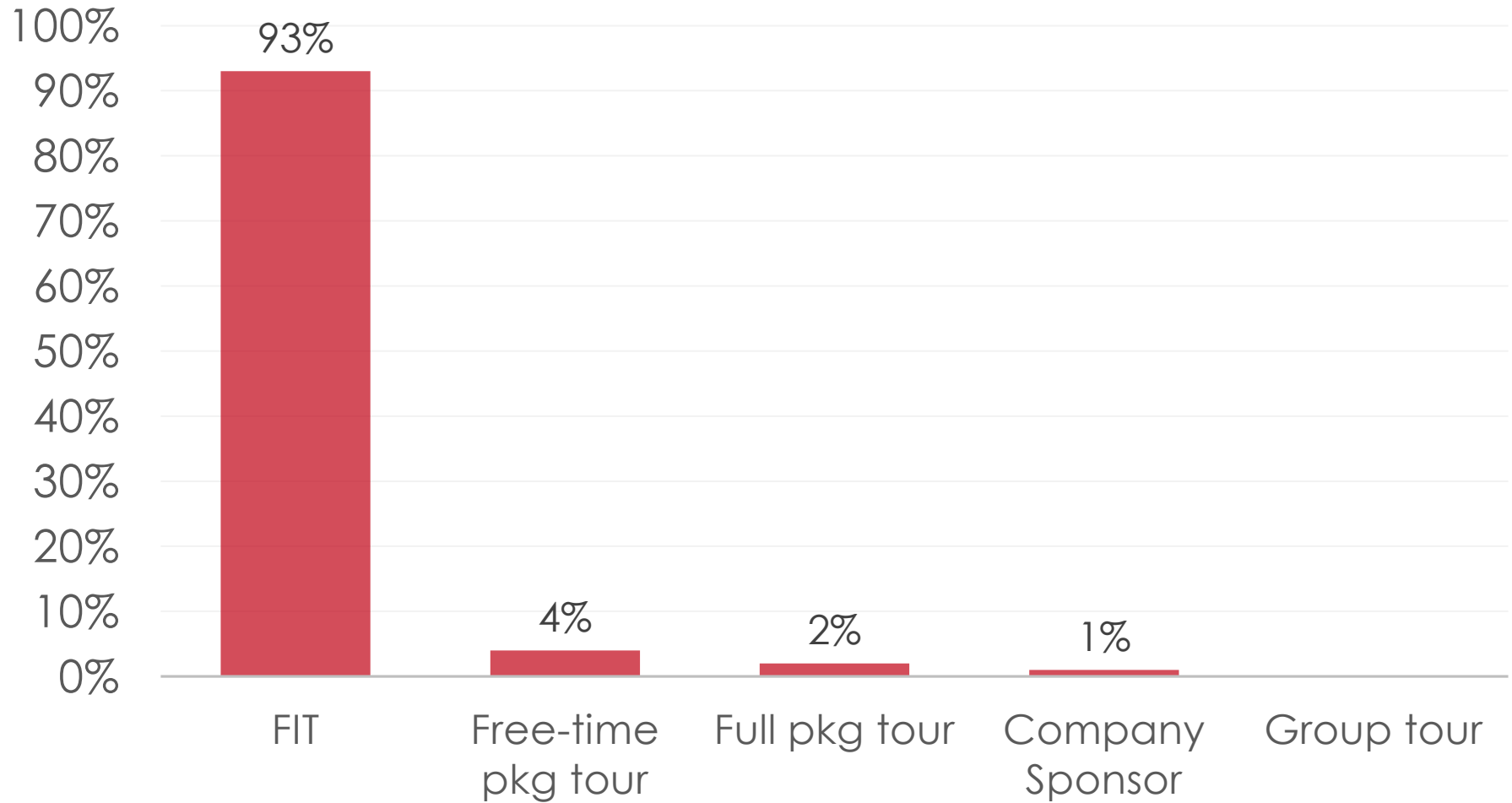
Travel Planning – FY2017 Tracking
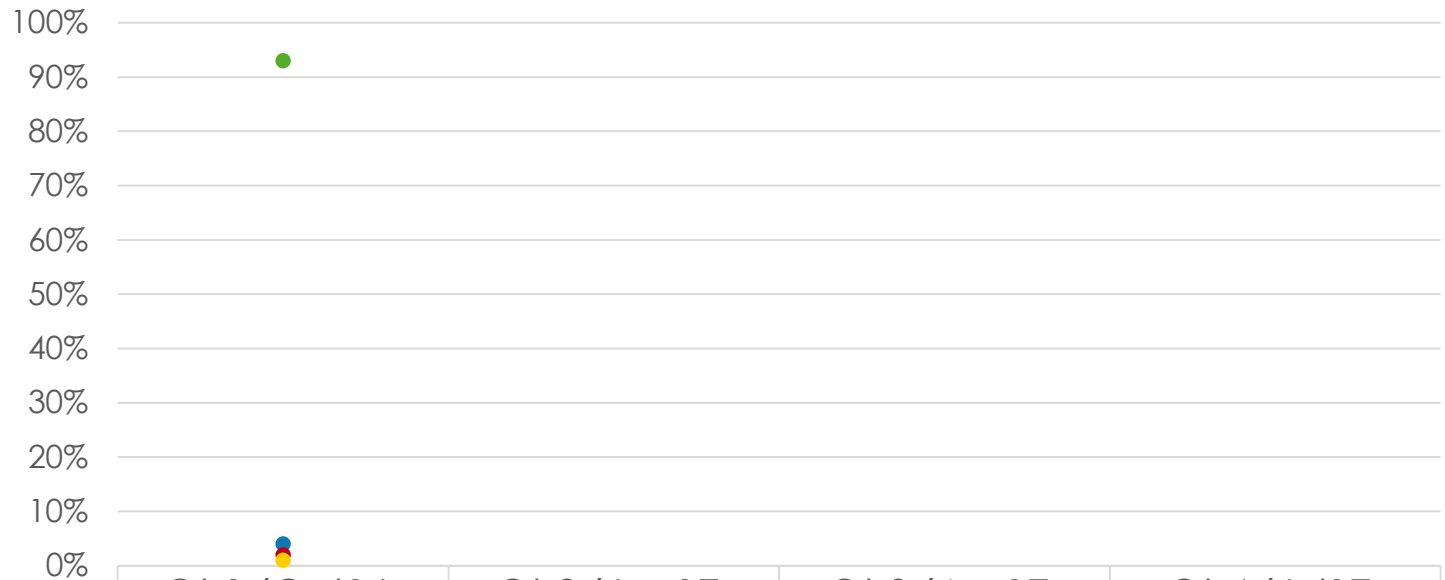
	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
Free-time pkg tour	4%			
Full pkg tour	2%			
FIT	93%			
Company	1%			
Group				

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Travel Planning – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY
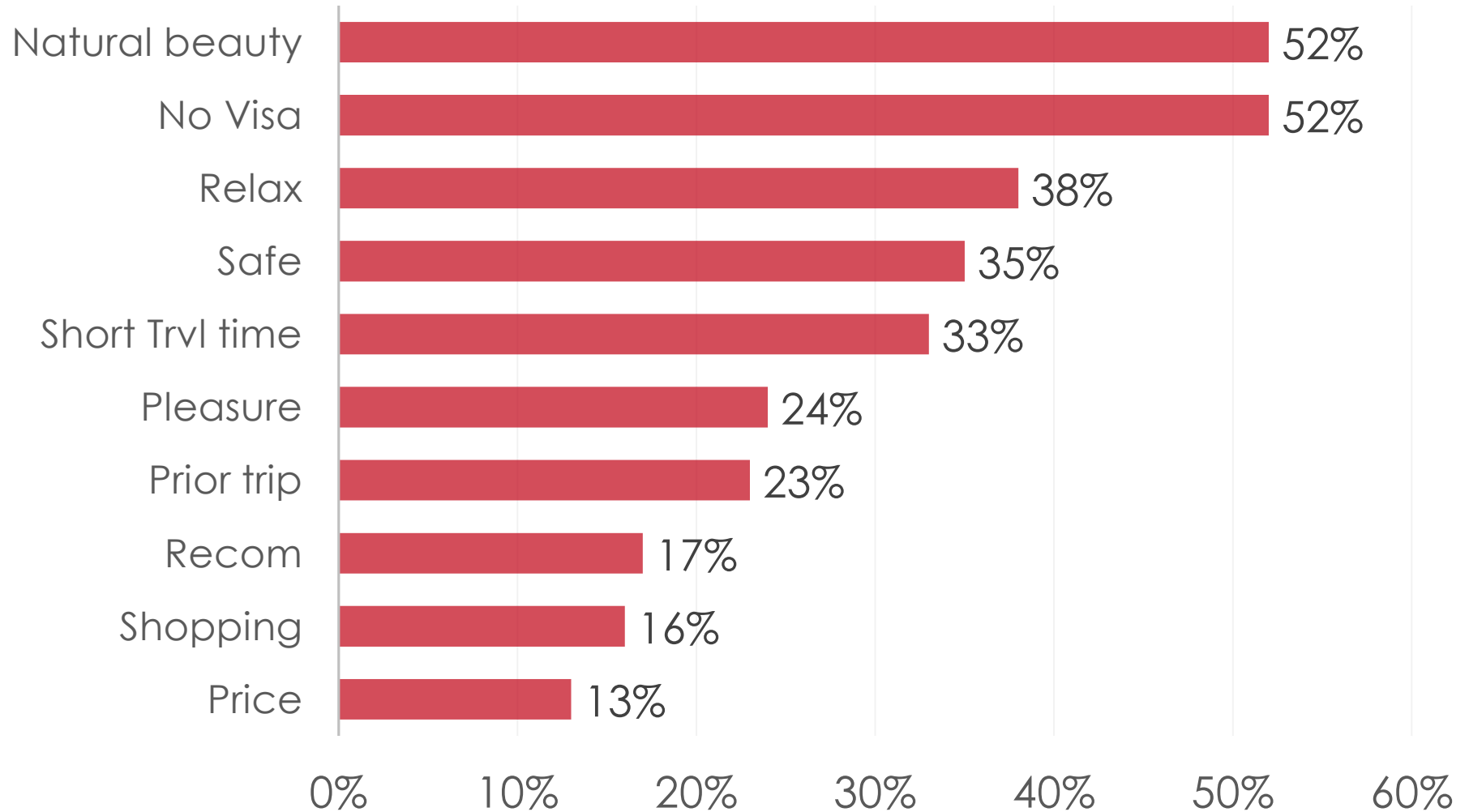
Q7 Please describe your travel arrangements to Guam?

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
q7	Individually arranged travel (FIT)	93%	93%	93%	92%		100%	95%
	Free-time package tour	4%	5%	4%	6%			4%
	Full package tour	2%	2%	4%	2%			2%
	Company paid travel	1%				100%		
	Total	82	57	28	52	1	1	57

Prepared by QMark Research

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Accommodations (Top Responses)

Chart showing "Stayed At" percentages and "Length of Stay":

Accommodation	Stayed At	Length of Stay
Fiesta Resort Guam	20%	8.00
Hilton Guam Resort	16%	8.46
Bayview Hotel	15%	9.67
Condo	9%	9.00
Holiday Resort Guam	9%	7.86
Lotte Hotel Guam	6%	8.60
Hyatt Regency Guam	5%	8.00
PIC Club	5%	10.25

Legend: Stayed At ● Length of Stay

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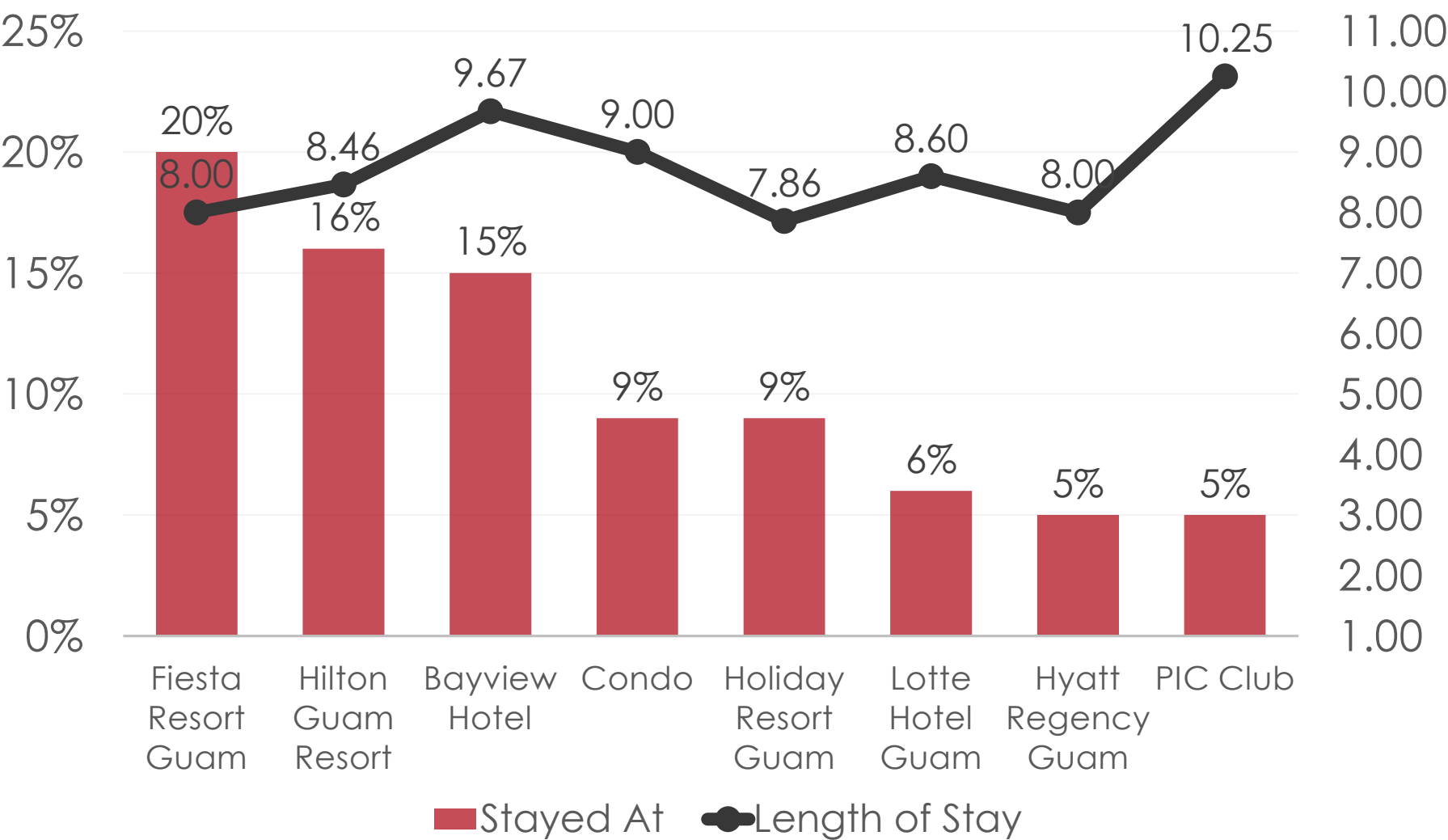
Travel Motivation (Top Responses)

Motivation	%
Natural beauty	52%
No Visa	52%
Relax	38%
Safe	35%
Short Trvl time	33%
Pleasure	24%
Prior trip	23%
Recom	17%
Shopping	16%
Price	13%

[A]

Travel Motivation – Key Segments

Q5A Please select the top 3 reasons that motivated you to travel to Guam?

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
Q5A	Natural beauty	52%	47%	43%	44%			47%
	No Visa required	52%	56%	64%	60%			51%
	Relax	38%	40%	46%	40%			35%
	Safe	35%	35%	36%	33%		100%	33%
	Short travel time	33%	37%	29%	33%		100%	33%
	Pleasure	24%	21%	21%	23%			28%
	Previous trip	23%	28%	25%	27%			18%
	Recomm-friend/family/trvl agnt	17%	18%	29%	19%			18%
	Shopping	16%	18%	14%	19%			12%
	Price	13%	12%	11%	10%			14%
	Visit friends/ Relatives	7%	7%	11%	6%			7%
	Water sports	2%	4%		4%			4%
	Scuba	2%	4%		4%			4%
	Honeymoon	1%	2%		2%		100%	2%
	Convention/ Trade/ Conference	1%				100%		
	Company Sponsored	1%				100%		
	Company/ Business Trip	1%				100%		
	Total	82	57	28	52	1	1	57

Prepared by QMark Research

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SECTION 3
EXPENDITURES

[A]
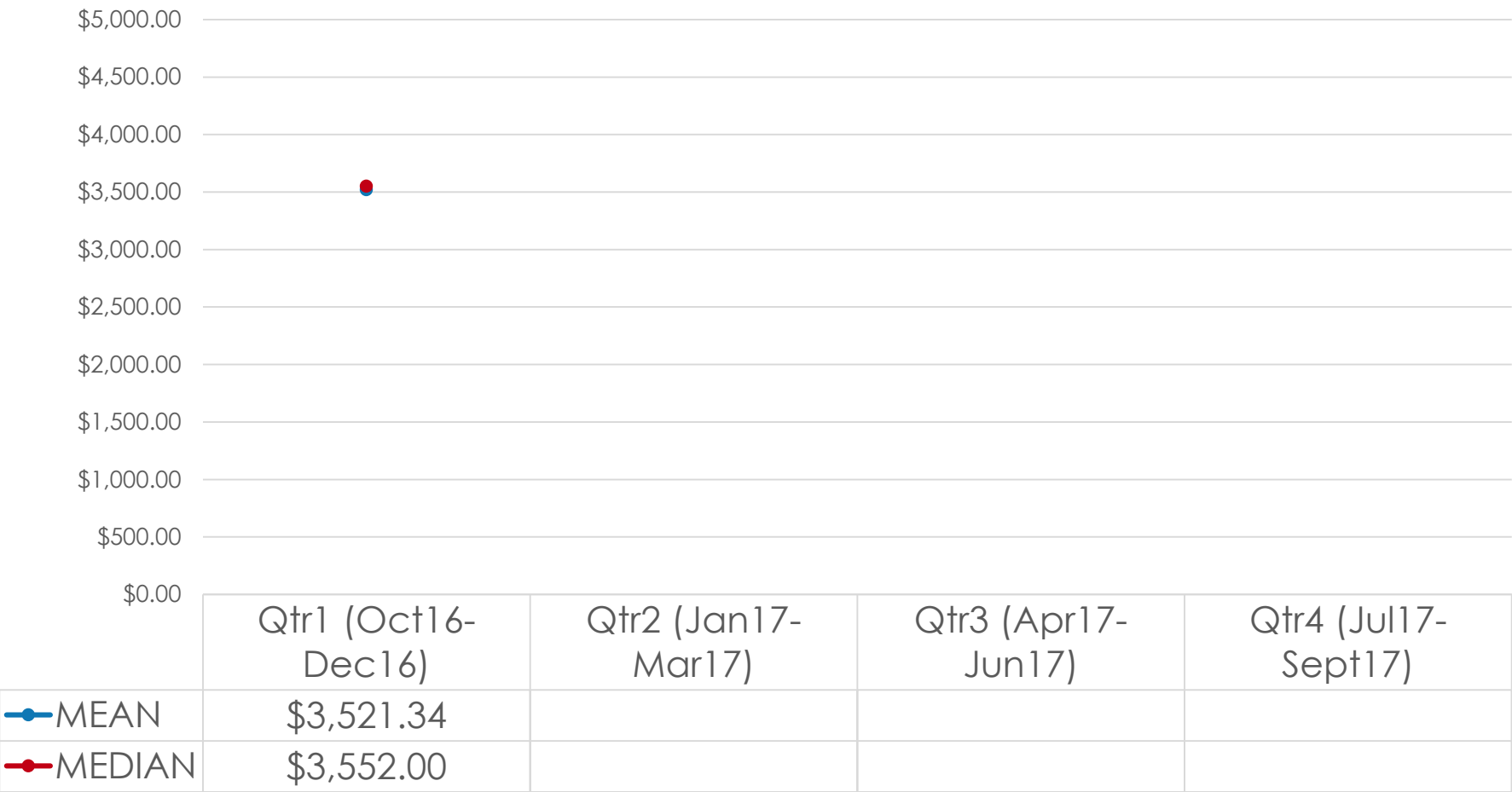
Prepaid Expenditures
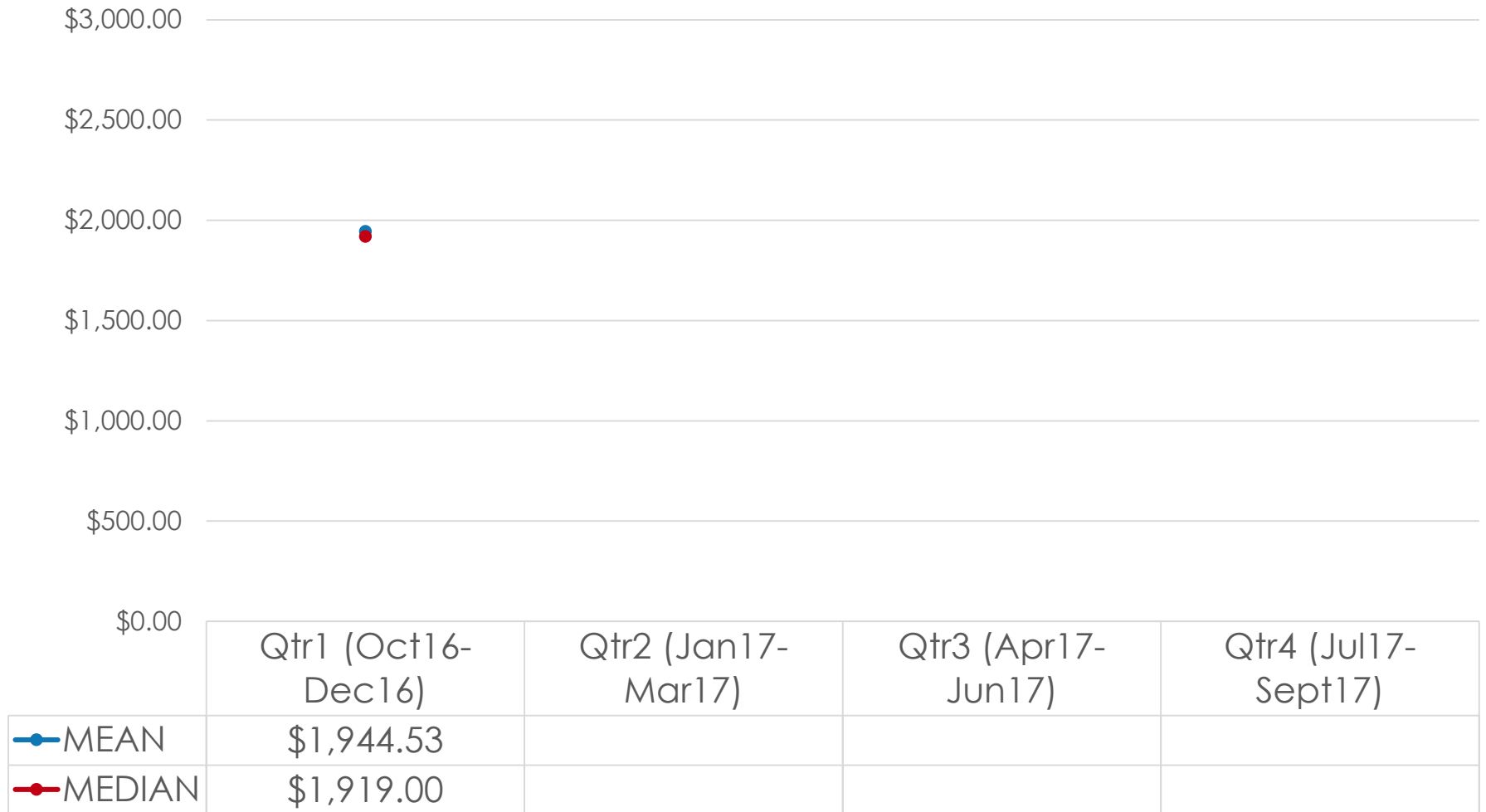
- $3,521.34 = overall mean average prepaid expense (for entire travel party size) by respondent

- $1,944.53 = overall mean average <u>per person</u> prepaid expenditures

[A]

Prepaid Entire Travel Party – FY2017 Tracking

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$3,521.34			
MEDIAN	$3,552.00			

[A]

Prepaid Per Person– FY2017 Tracking

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$1,944.53			
MEDIAN	$1,919.00			

[A]

Prepaid Per Person– Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q10A How much did you pay in Russia before coming to Guam for the tour package, your airfare, lodging meals, and transportation?

PER PERSON

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
RUB$	Mean	$1,944.53	$1,795.01	$1,760.38	$1,791.12	$1,993.67	$1,550.63	$1,902.67
	Median	$1,919	$1,820	$1,776	$1,820	$1,994	$1,551	$1,899

Prepared by QMark Research

[A]

Prepaid Expenses by Category – MEAN Entire Travel Party
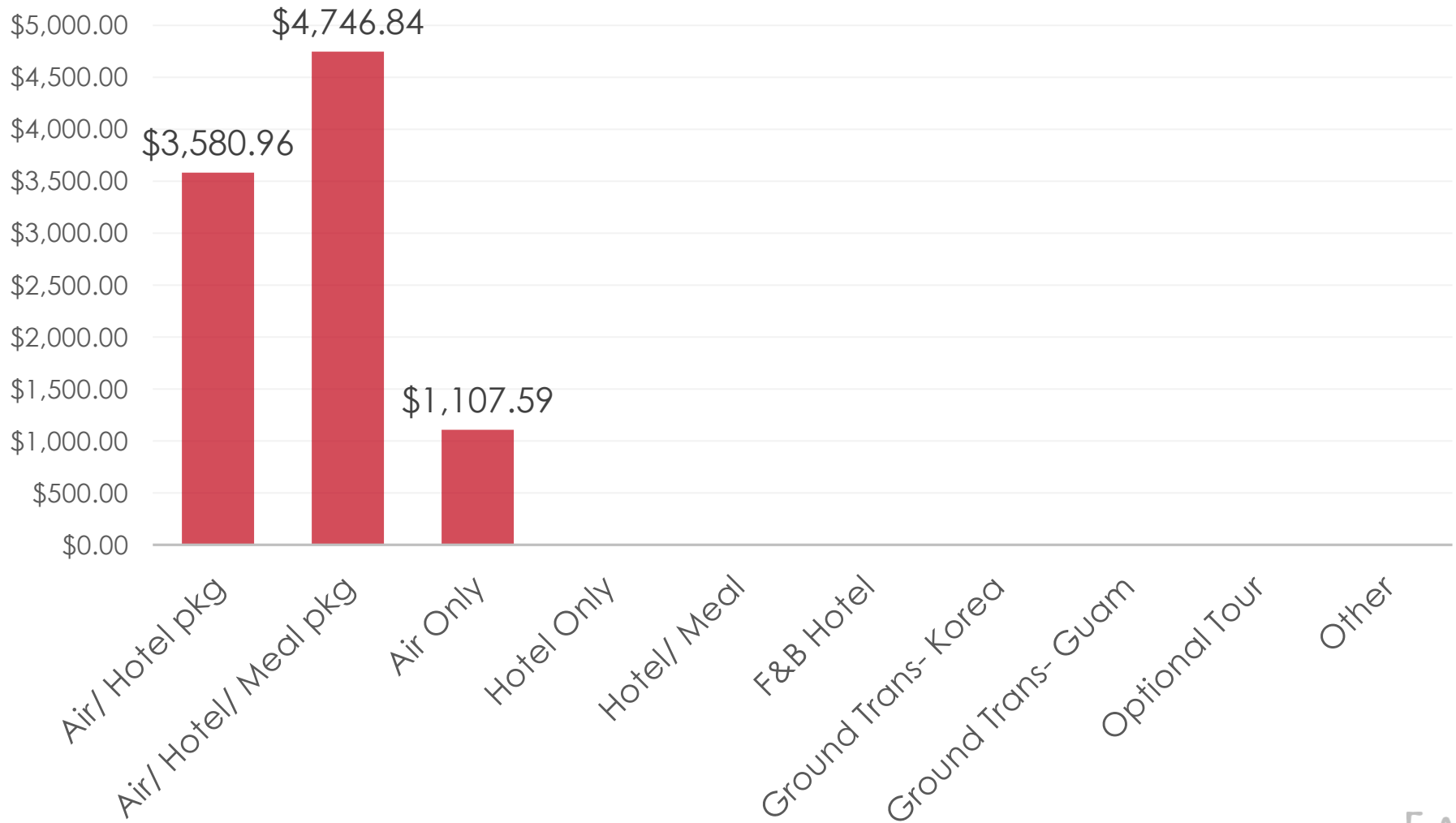
Prepaid– FY2017 Tracking
Airfare & Accommodation Packages

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$3,580.96			
MEDIAN	$3,623.00			

[A]
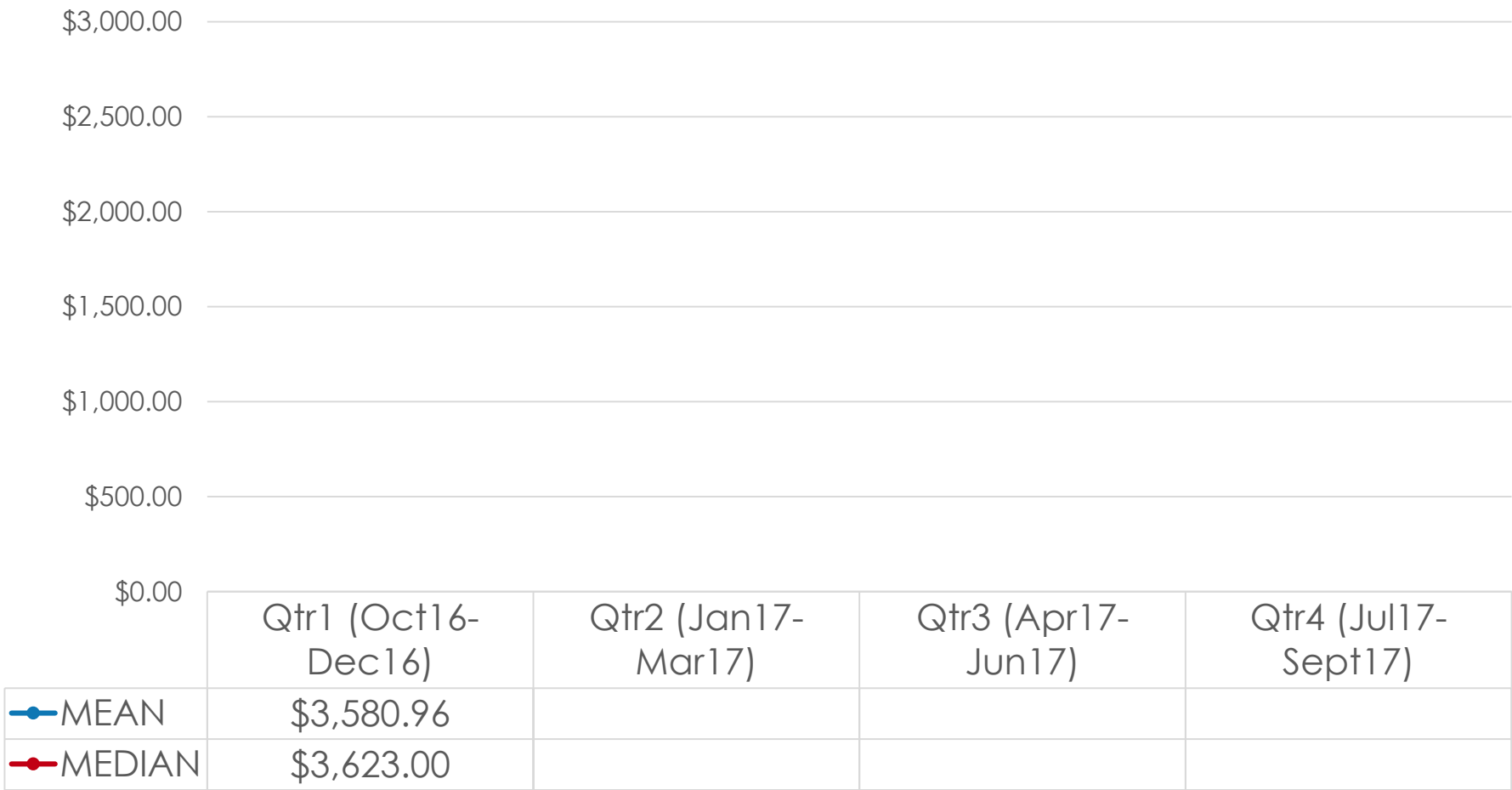
Prepaid– FY2017 Tracking
Airfare & Accommodation W/ Meal Packages

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$4,746.84			
MEDIAN	$4,747.00			

[A]

Prepaid– FY2017 Tracking
Airfare Only

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$1,107.59			
MEDIAN	$1,107.59			

[A]
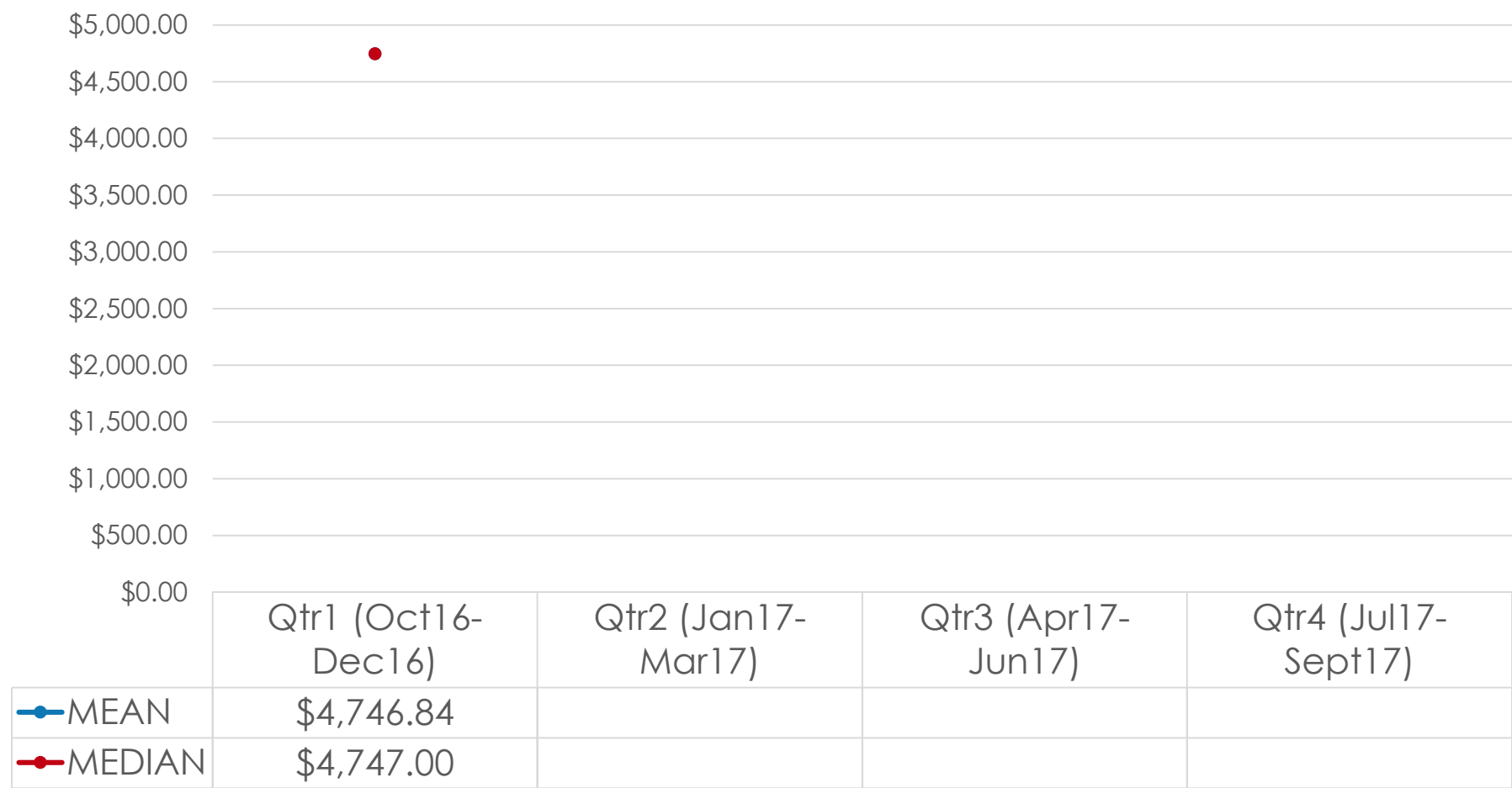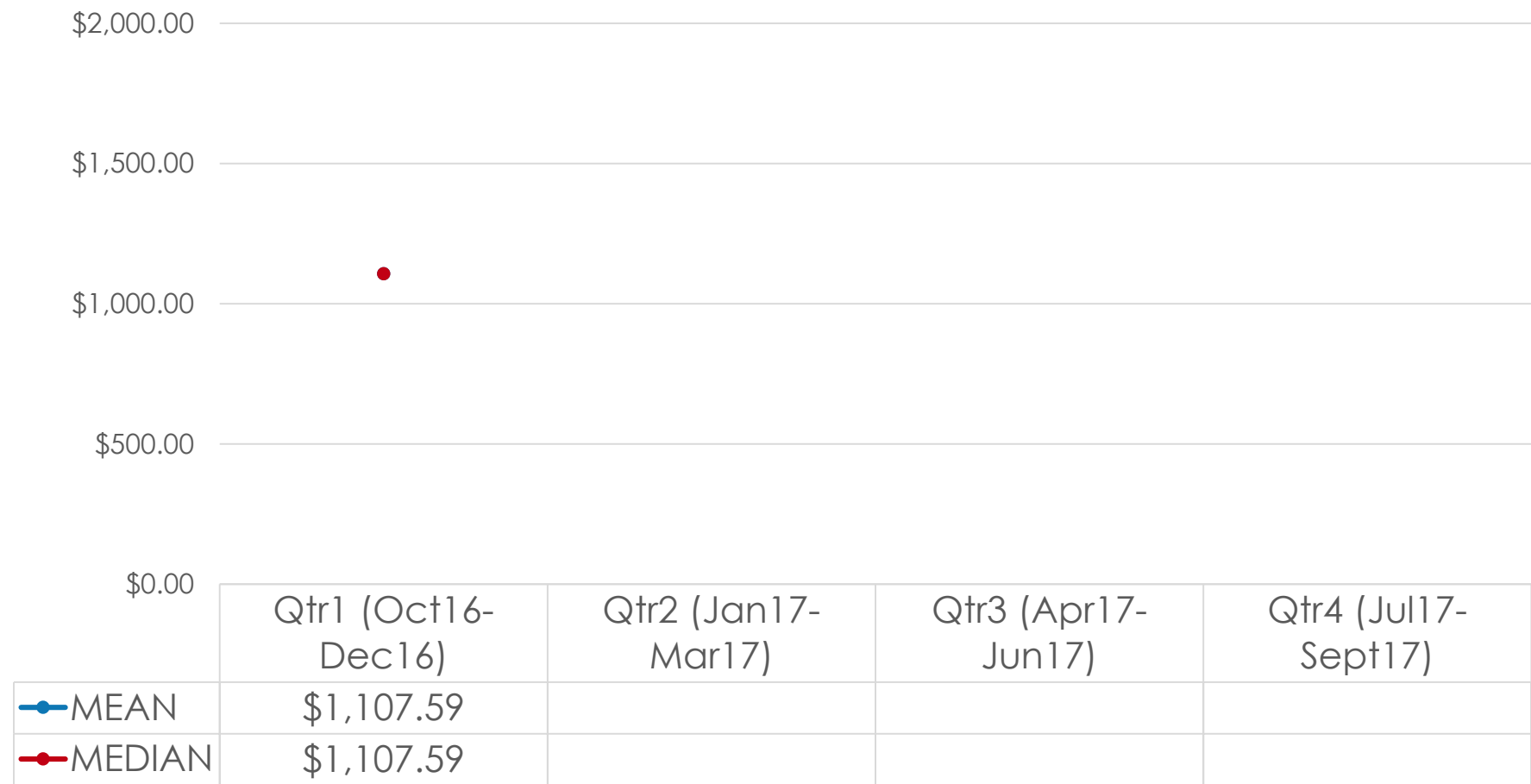
Prepaid– FY2017 Tracking
Accommodations Only (none recorded)

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN				
MEDIAN				

[A]

Prepaid– FY2017 Tracking
Accommodations w/ Meal Only (none recorded)

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN				
MEDIAN				

[A]
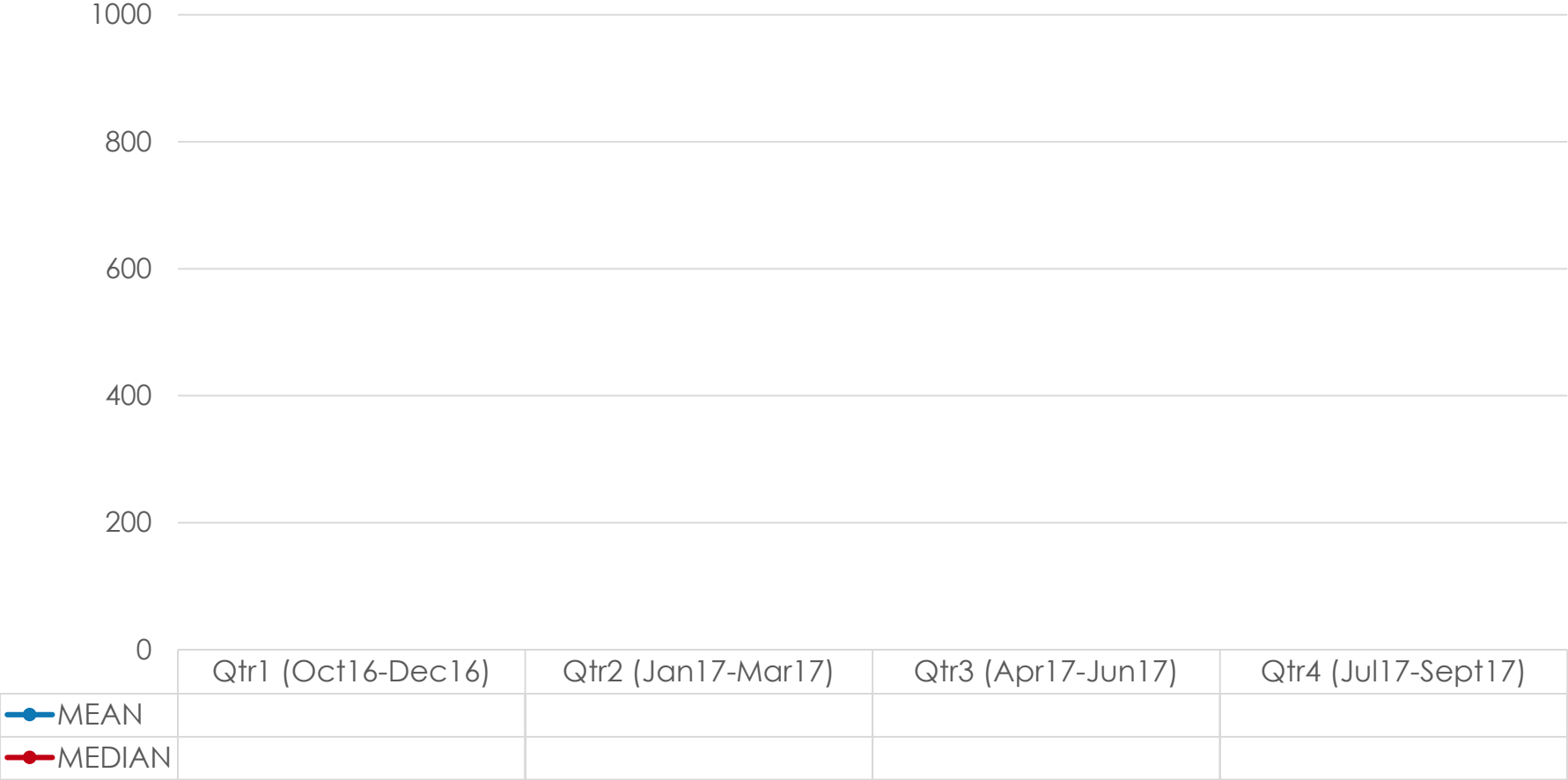
Prepaid– FY2017 Tracking
Food & Beverage in Hotel (none recorded)

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN				
MEDIAN				

[A]
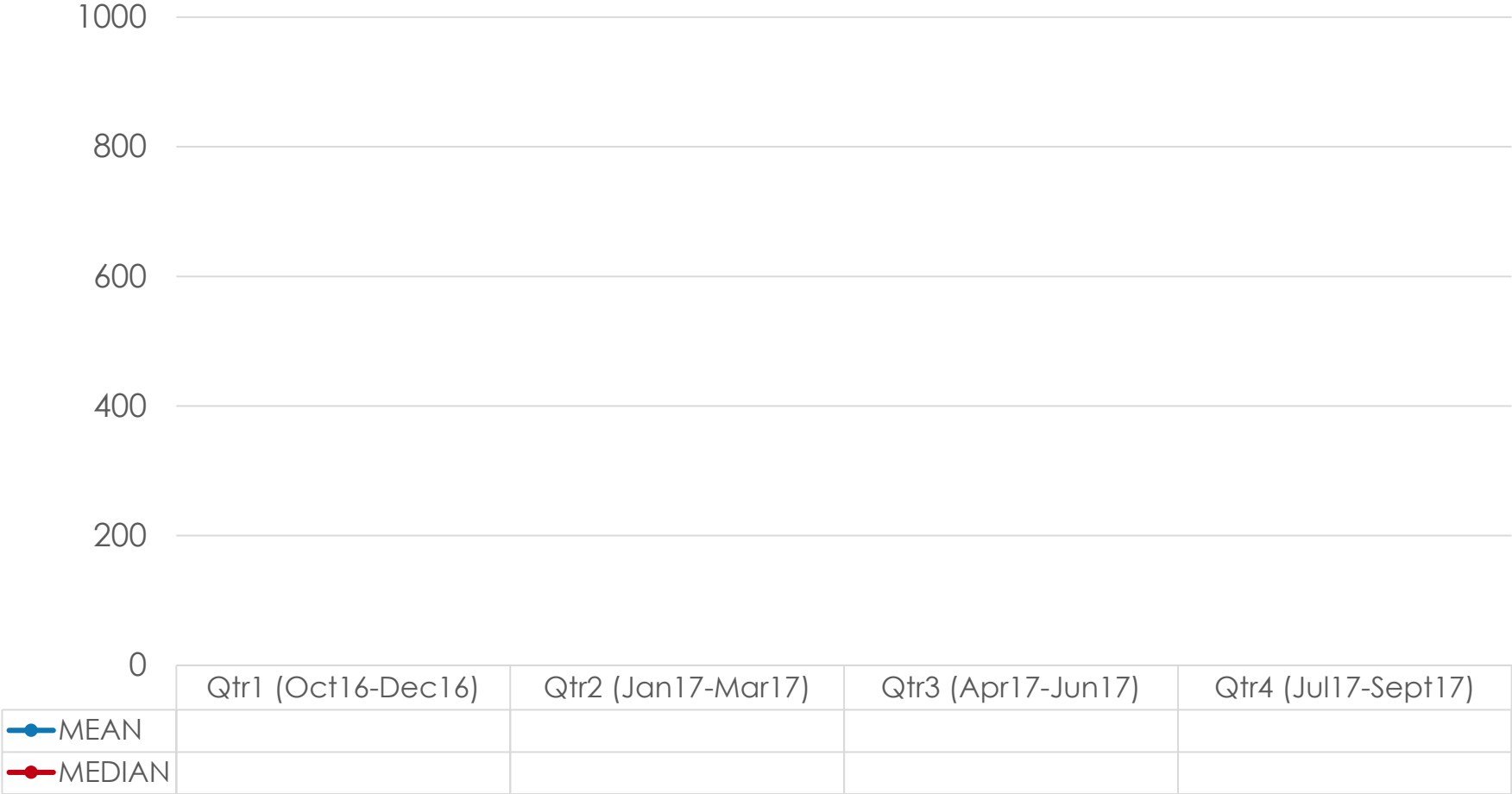
Prepaid– FY2017 Tracking
Ground Transportation – Russia (none recorded)

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN				
MEDIAN				

[A]
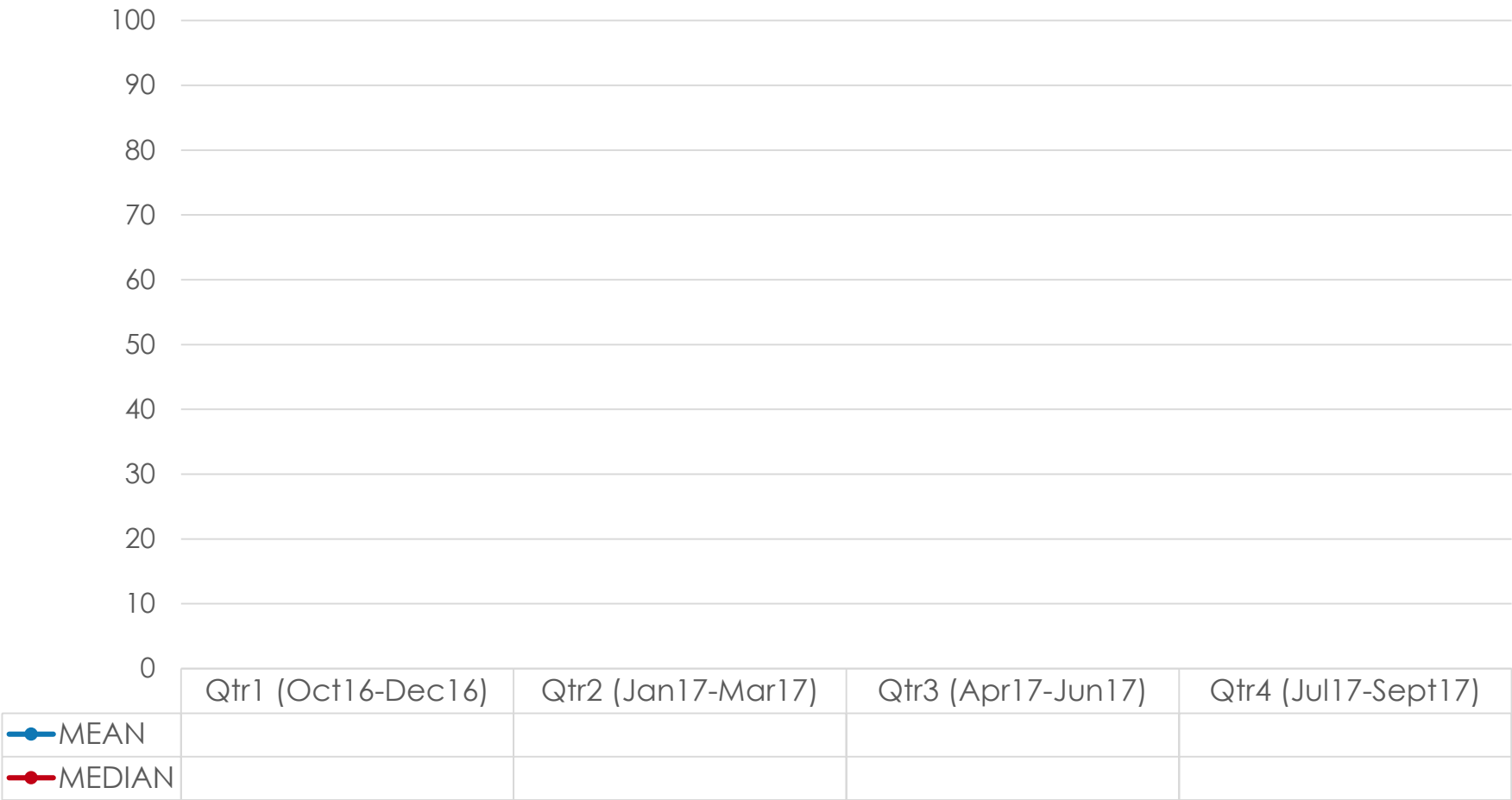
Prepaid– FY2017 Tracking
Ground Transportation – Guam (none recorded)

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN				
MEDIAN				

[A]
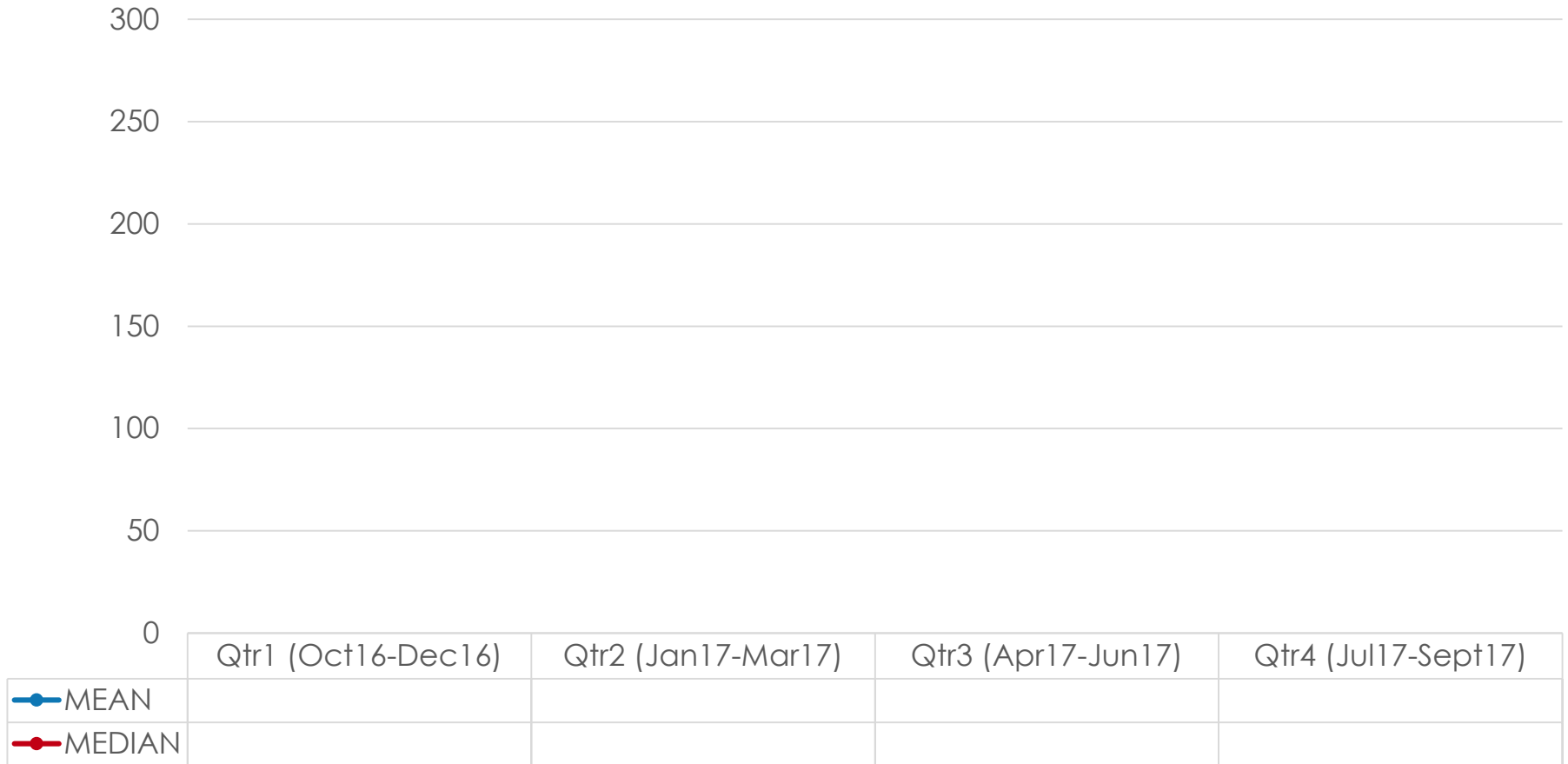
Prepaid– FY2017 Tracking
Optional tours/ Activities (none recorded)

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN				
MEDIAN				

500

400

300

200

100

0

[A]

On-Island Expenditures

- $1,016.24 = overall mean average prepaid expense (for entire travel party size) by respondent

- $591.35 = overall mean average <u>per person</u> prepaid expenditures

[A]

On-Island Entire Travel Party – FY2017 Tracking

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$1,016.24			
MEDIAN	$955.00			

[A]

On-Island Per Person – FY2017 Tracking

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
●—MEAN	$591.35			
●—MEDIAN	$558.00			

[A]

On-Island Per Person – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q11A How much in total did you spend while on Guam during this trip?

PER PERSON

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
ONISLE	Mean	$591.35	$497.30	$513.51	$502.33	$700.00	$425.00	$613.64
	Median	$558	$495	$498	$498	$700	$425	$570

Prepared by QMark Research

[A]

Per Person MEAN expenditures – FY2017 Tracking On-Island/ Prepaid

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
On-Island	$591.35			
Prepaid	$1,944.53			

[A]
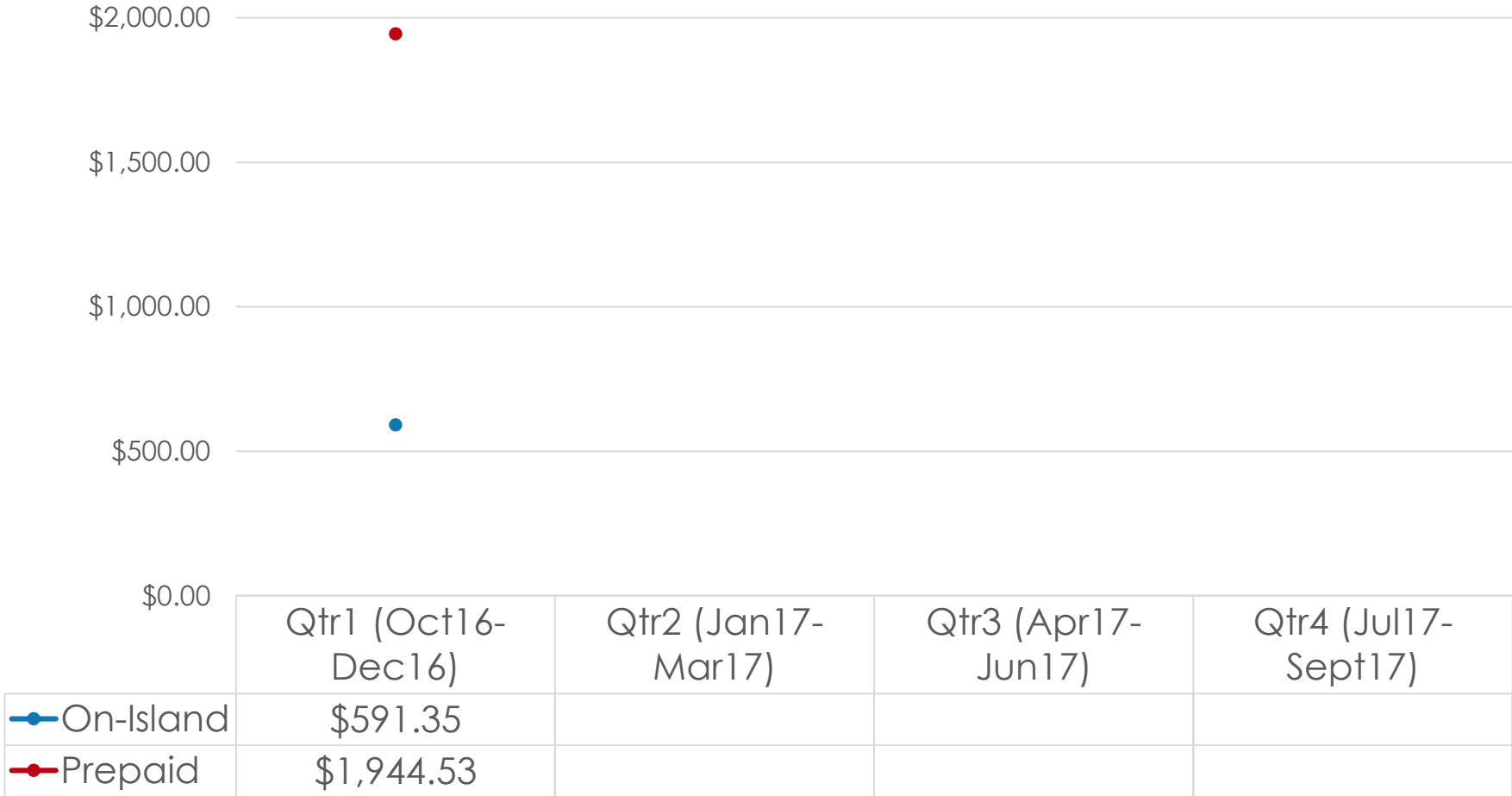
On-Island Per Day Spending – FY2017 Tracking MEAN
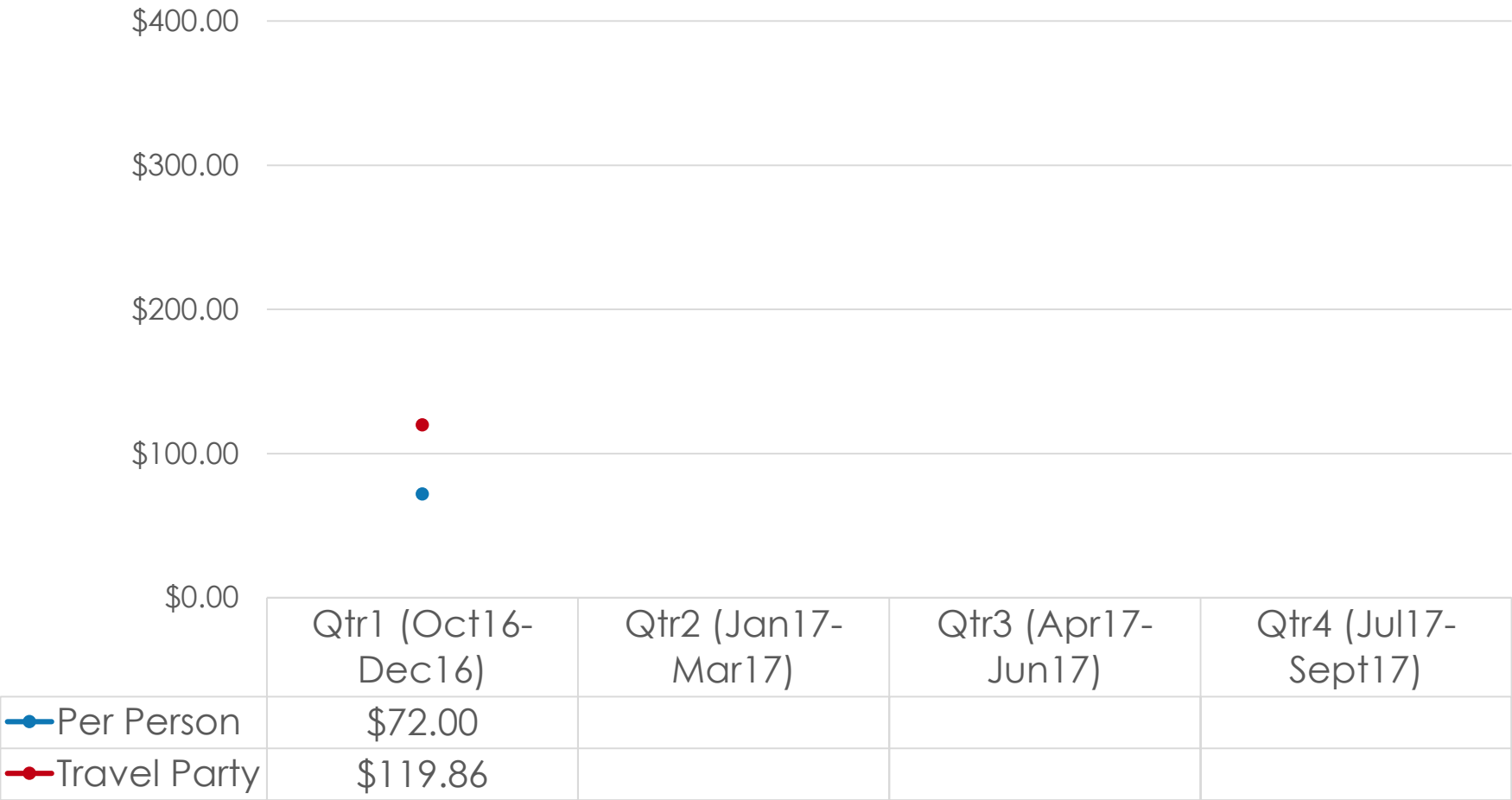
	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
Per Person	$72.00			
Travel Party	$119.86			

[A]

On-Island Expenses by Category – MEAN Entire Travel Party

Bar chart showing mean on-island expenses by category:
- F&B Hotel: $141.34
- F&B Fast Food/Conv Store: $59.27
- F&B Restaurant: $73.68
- Optional Tour: $157.07
- Gift- Self: $269.94
- Gift- Others: $121.95
- Local Trans: $144.02
- Other: $48.96

[A]

On-Island – FY2017 Tracking
Food & Beverage - Hotel

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$141.34			

[A]
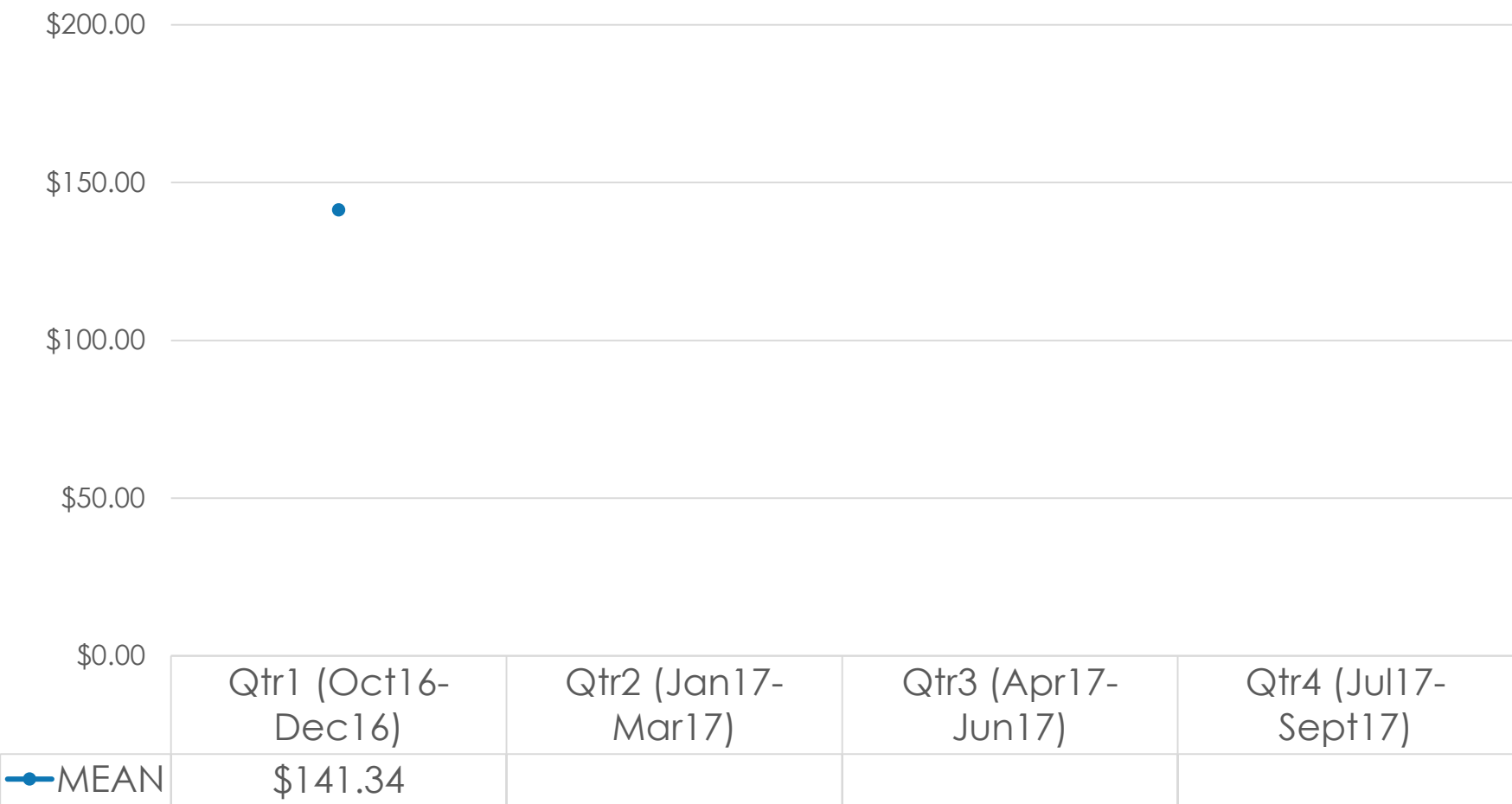
On-Island – FY2017 Tracking
Food & Beverage – Fast Food/ Convenience Store

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$59.27			

56
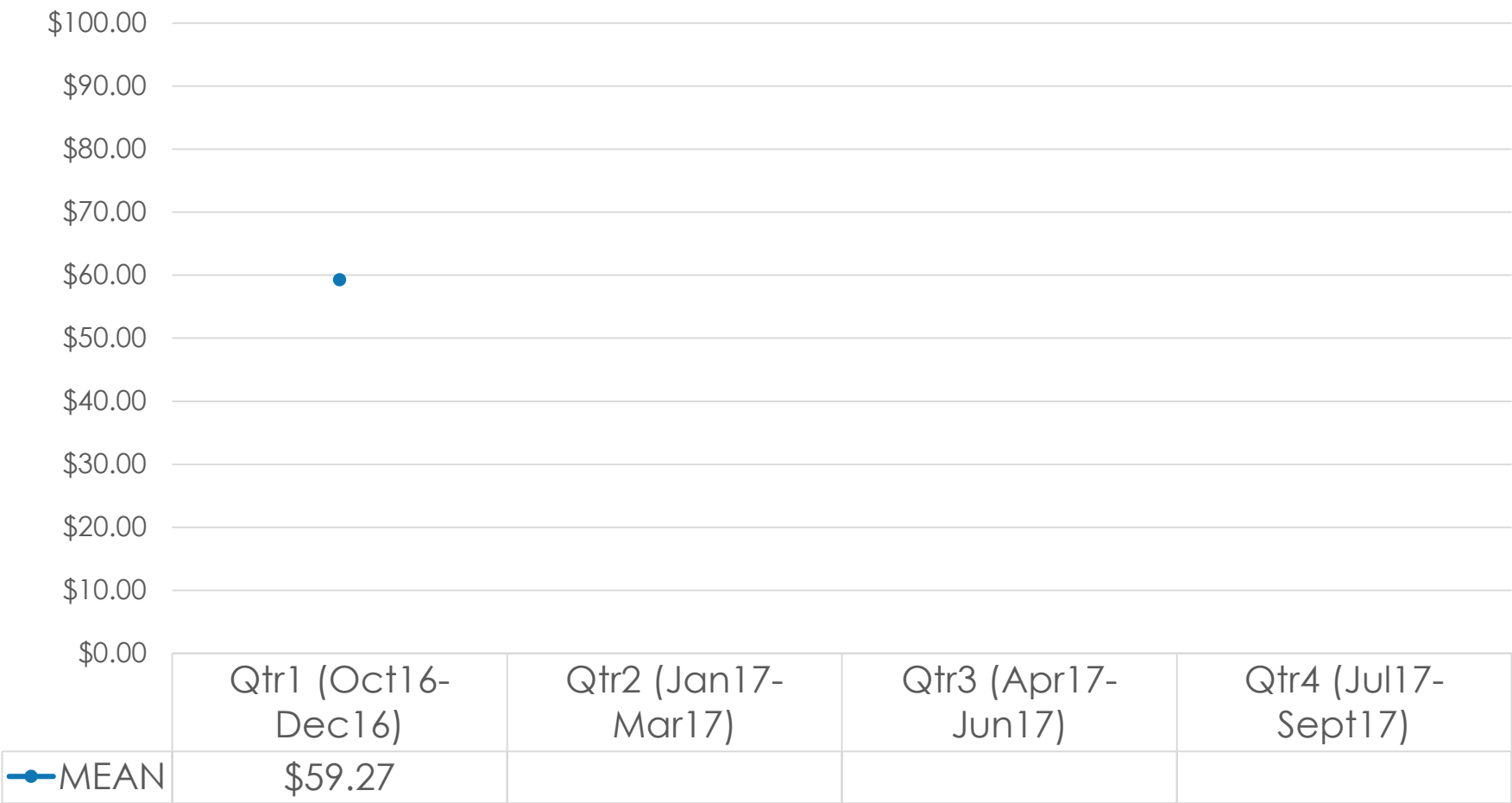
On-Island – FY2017 Tracking
Food & Beverage – Restaurant/ Drinking Est Outside Hotel

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$73.68			

[A]
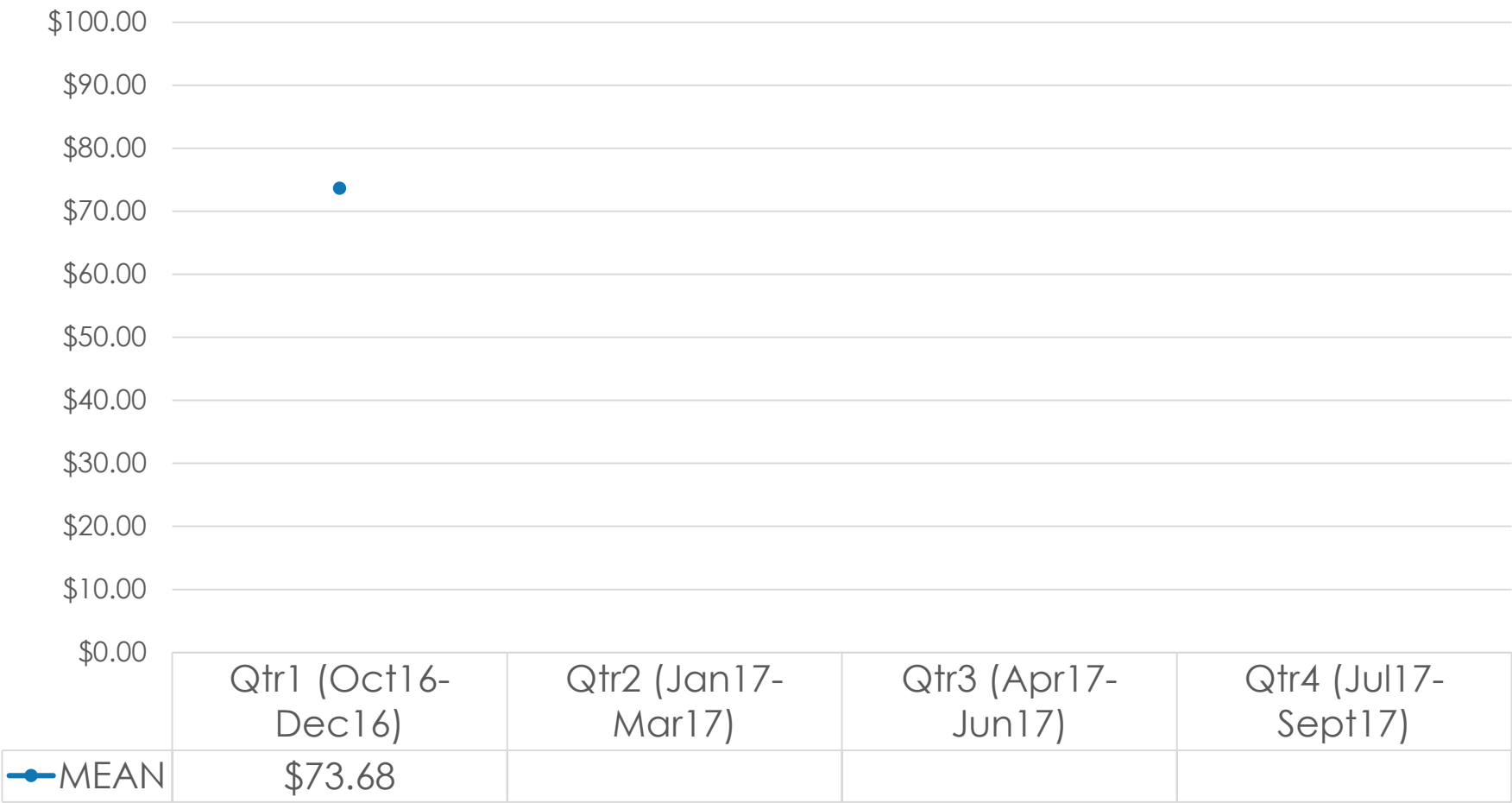
On-Island – FY2017 Tracking
Optional tour/ Activities

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$157.07			

[A]
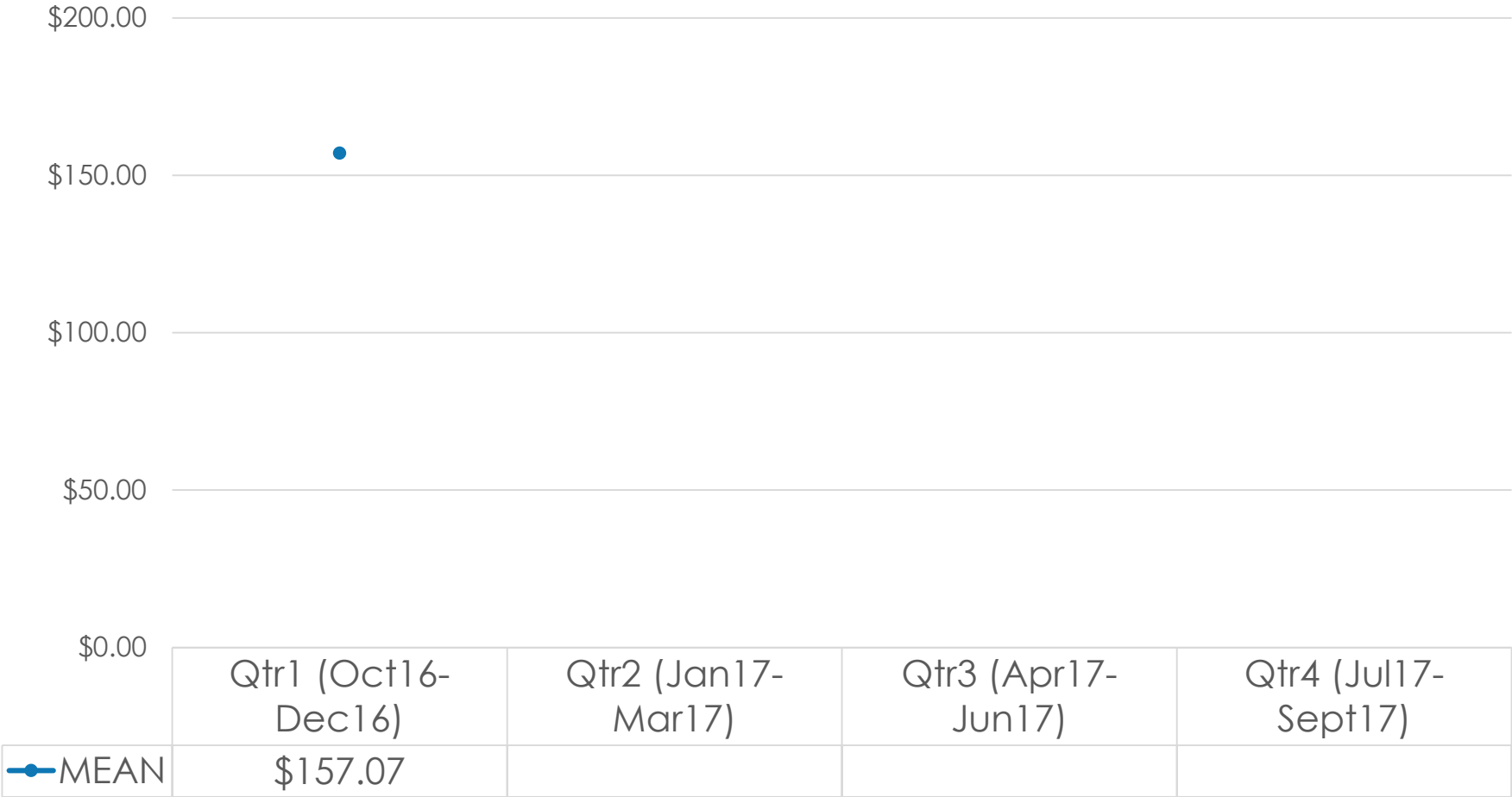
On-Island – FY2017 Tracking
Gift/ Souvenir – Self/ Companion

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$269.94			

[A]
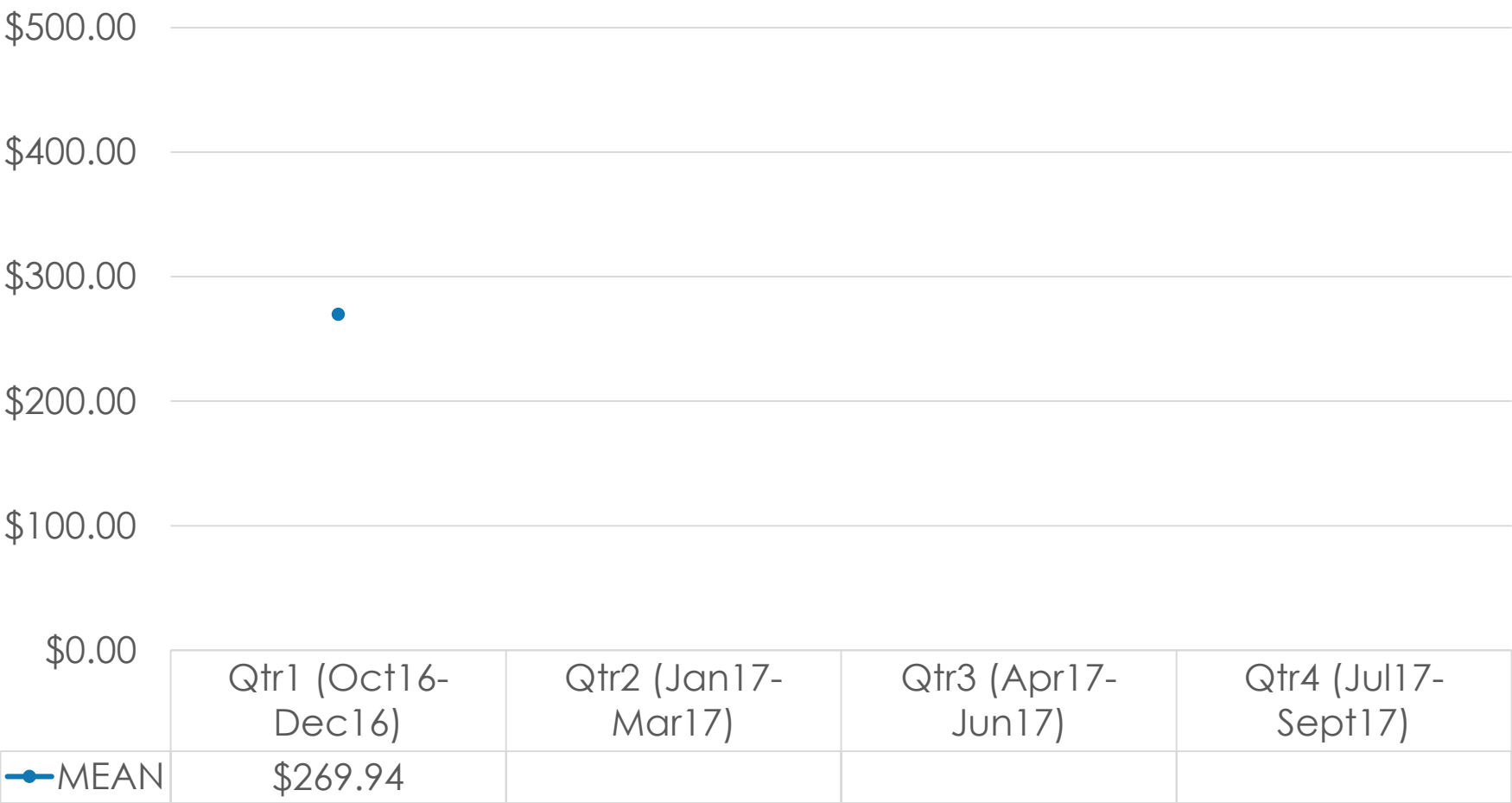
On-Island – FY2017 Tracking
Gift/ Souvenir – Friends/ Family

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$121.95			

[A]
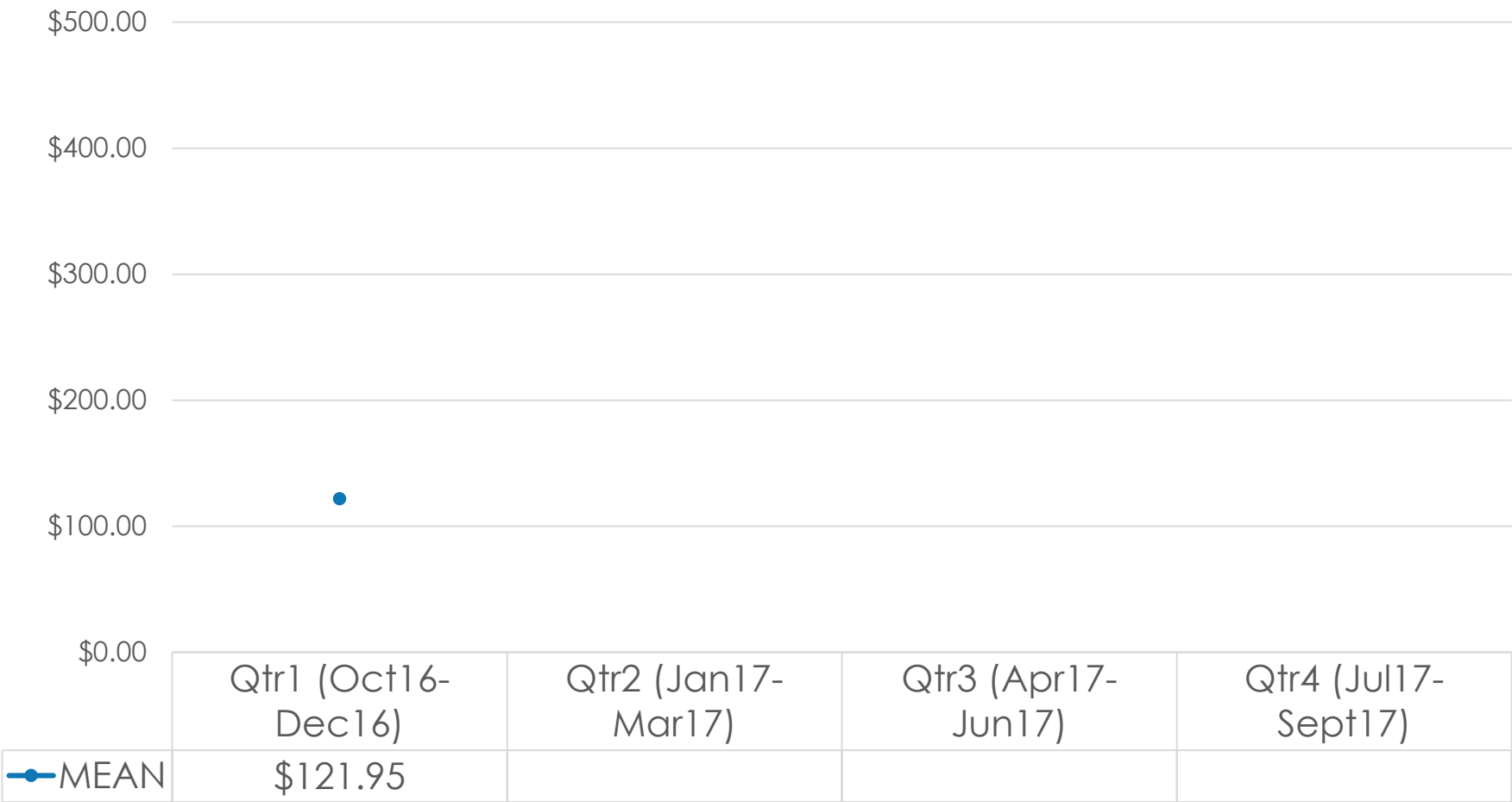
On-Island – FY2017 Tracking
Local Transportation

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$144.02			
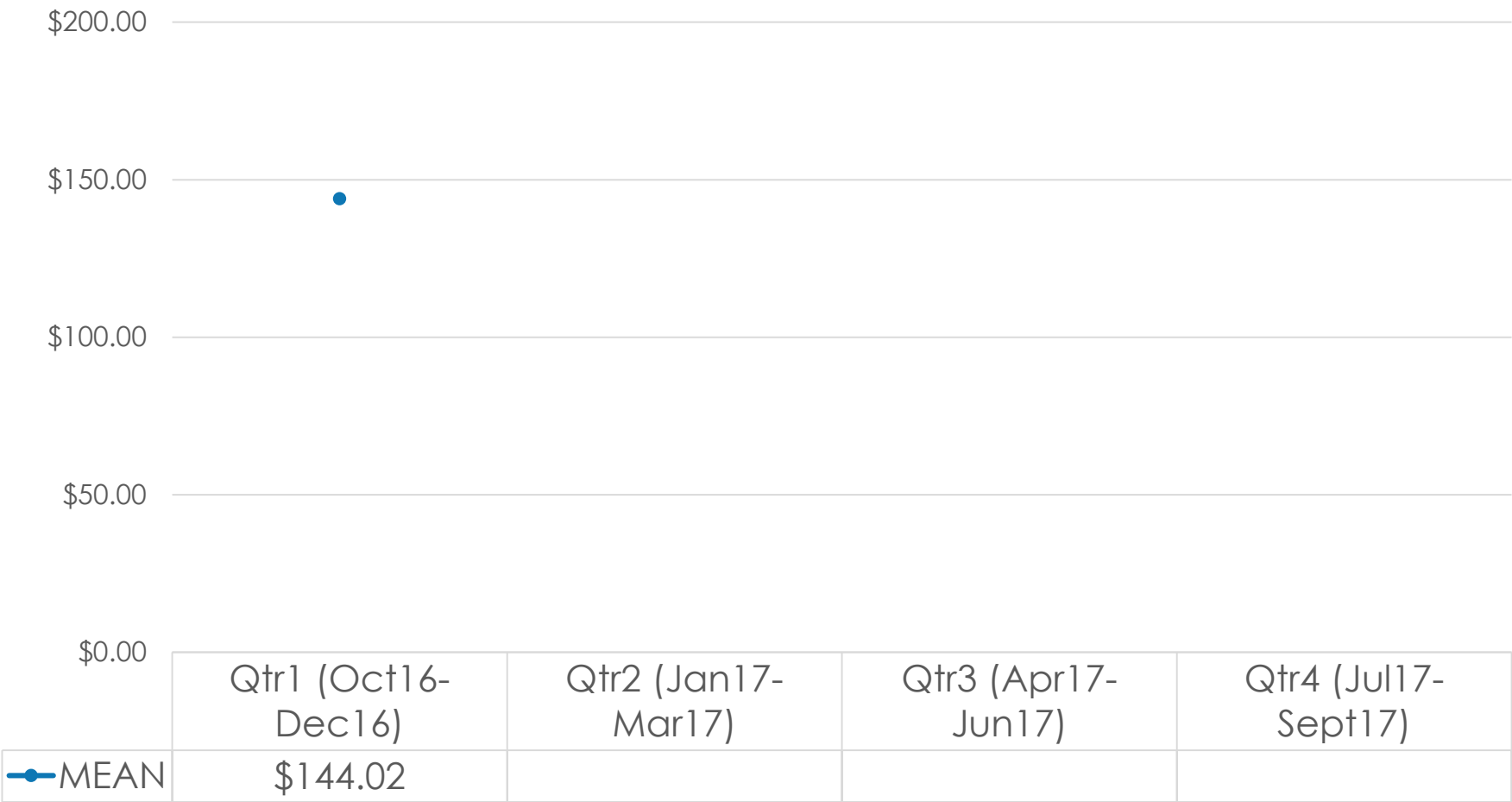
On-Island – FY2017 Tracking
Other Not Included

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$48.96			

[A]
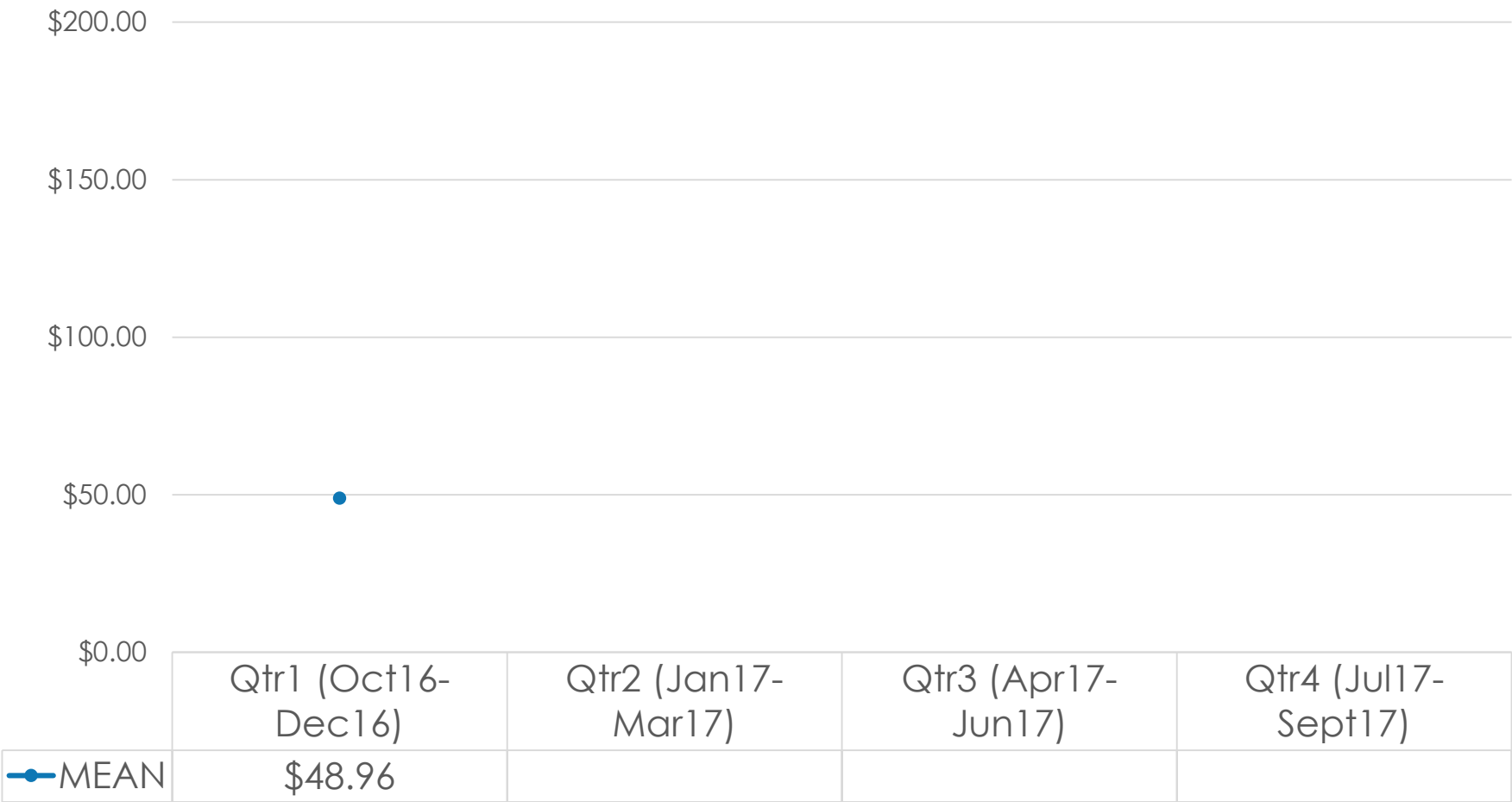
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- $2,535.88 = overall mean average prepaid & on-isle expense

[A]

TOTAL Per Person Expenditures – FY2017 Tracking

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN	$2,535.88			
MEDIAN	$2,469.00			

[A]
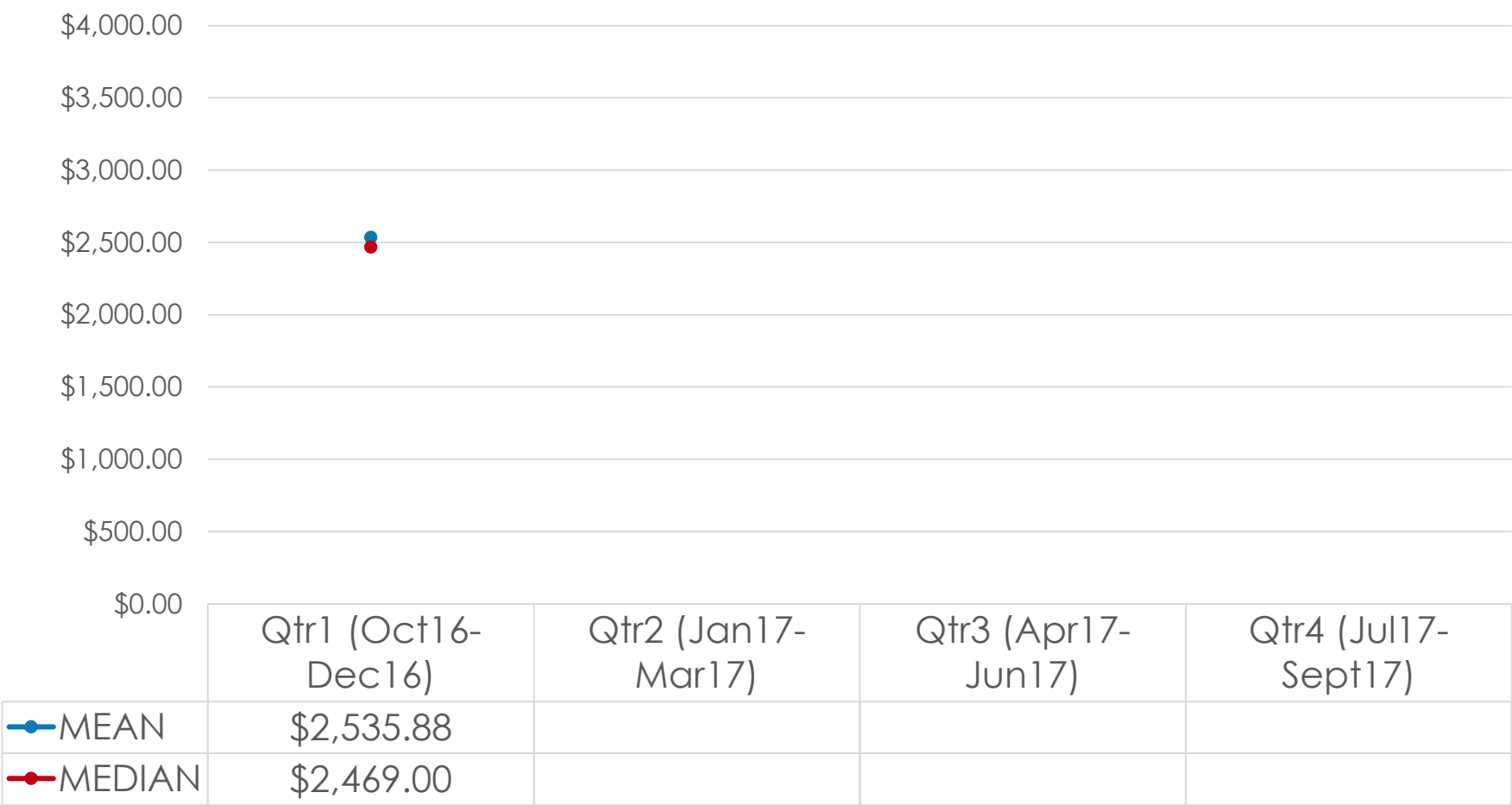
TOTAL Per Person Expenditures – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

TOTAL EXPENDITURES (On-Isle / Prepaid)

PER PERSON

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
TOTAL PP	Mean	$2,535.88	$2,292.31	$2,273.89	$2,293.45	$2,693.67	$1,975.63	$2,516.31
	Median	$2,469	$2,303	$2,288	$2,298	$2,694	$1,976	$2,418

Prepared by QMark Research

[A]

PARTICIPATED IN SHOP GUAM e-FESTIVAL

Yes
100%

[A]
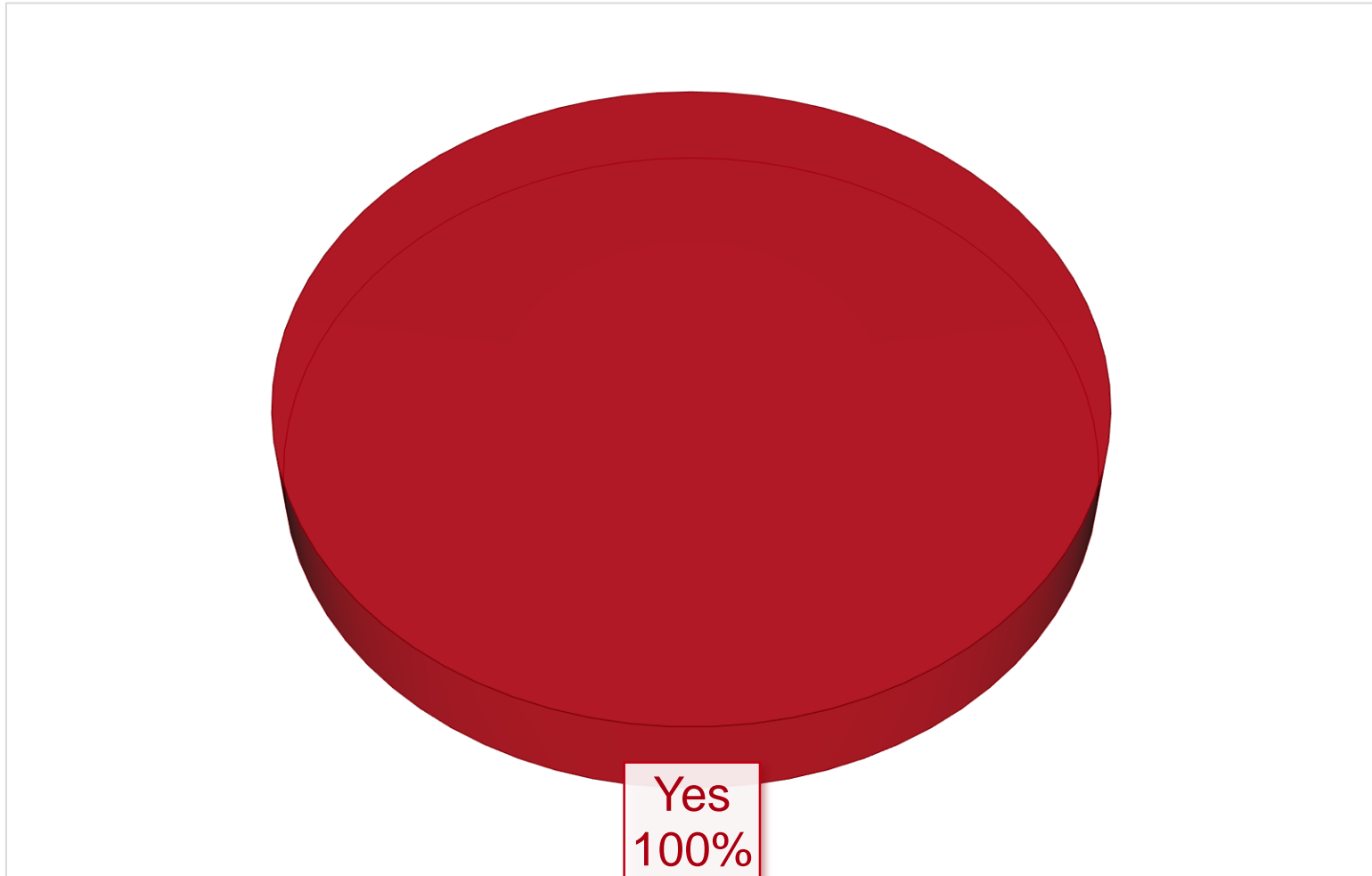
SHOP GUAM E-FESTIVAL SPENDING – FY2017 Tracking

	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
●— MEAN	$336.15			

[A]
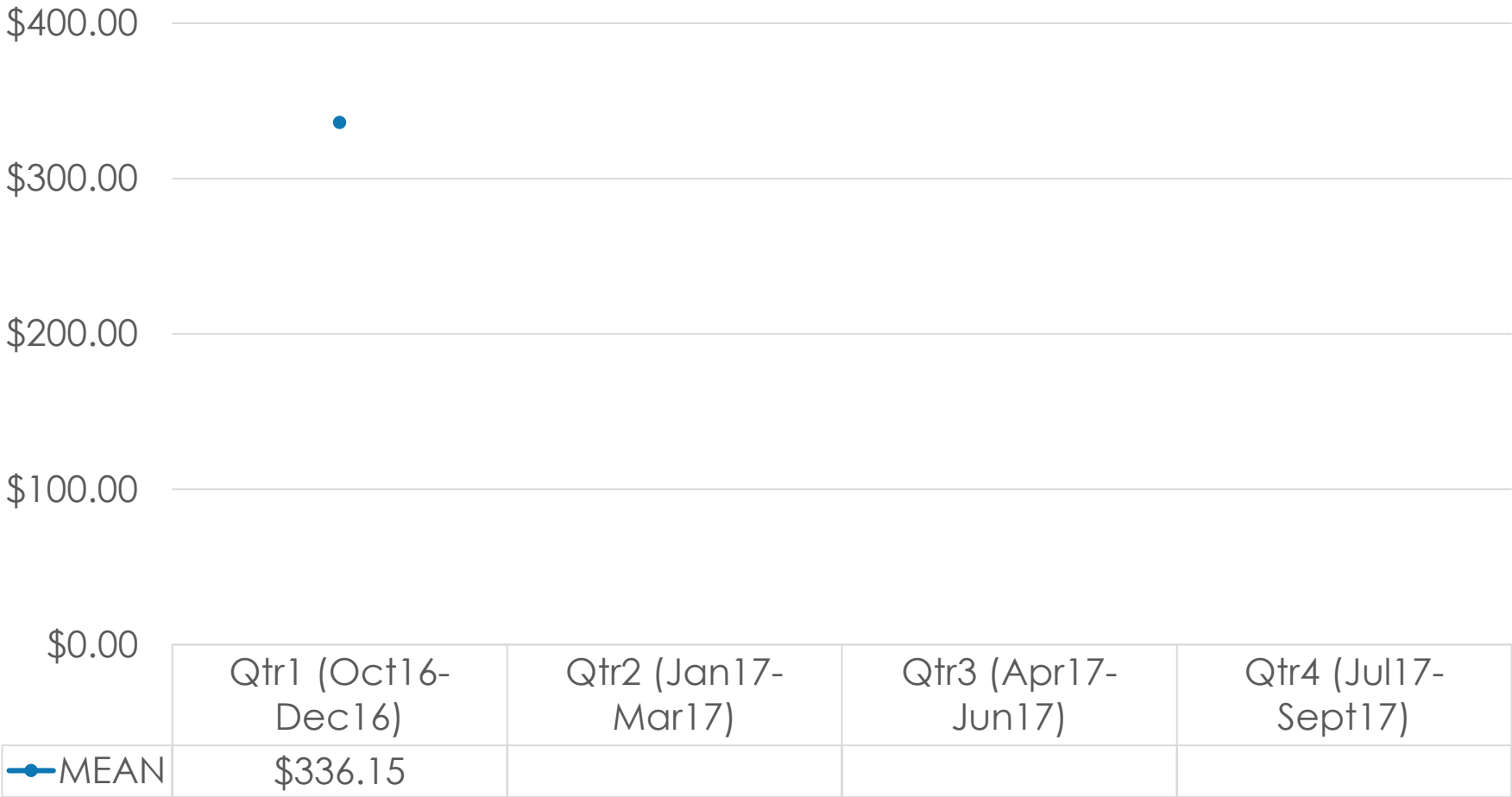
SECTION 4
VISITOR SATISFACTION BEHAVIOR

[A]

OVERALL SATISFACTION

Chart legend: Very Satisfied (Top Box) — MEAN (7pt Scale)

Data shown: Qtr1 (Oct16-Dec16) = 41%, MEAN = 6.41

[A]
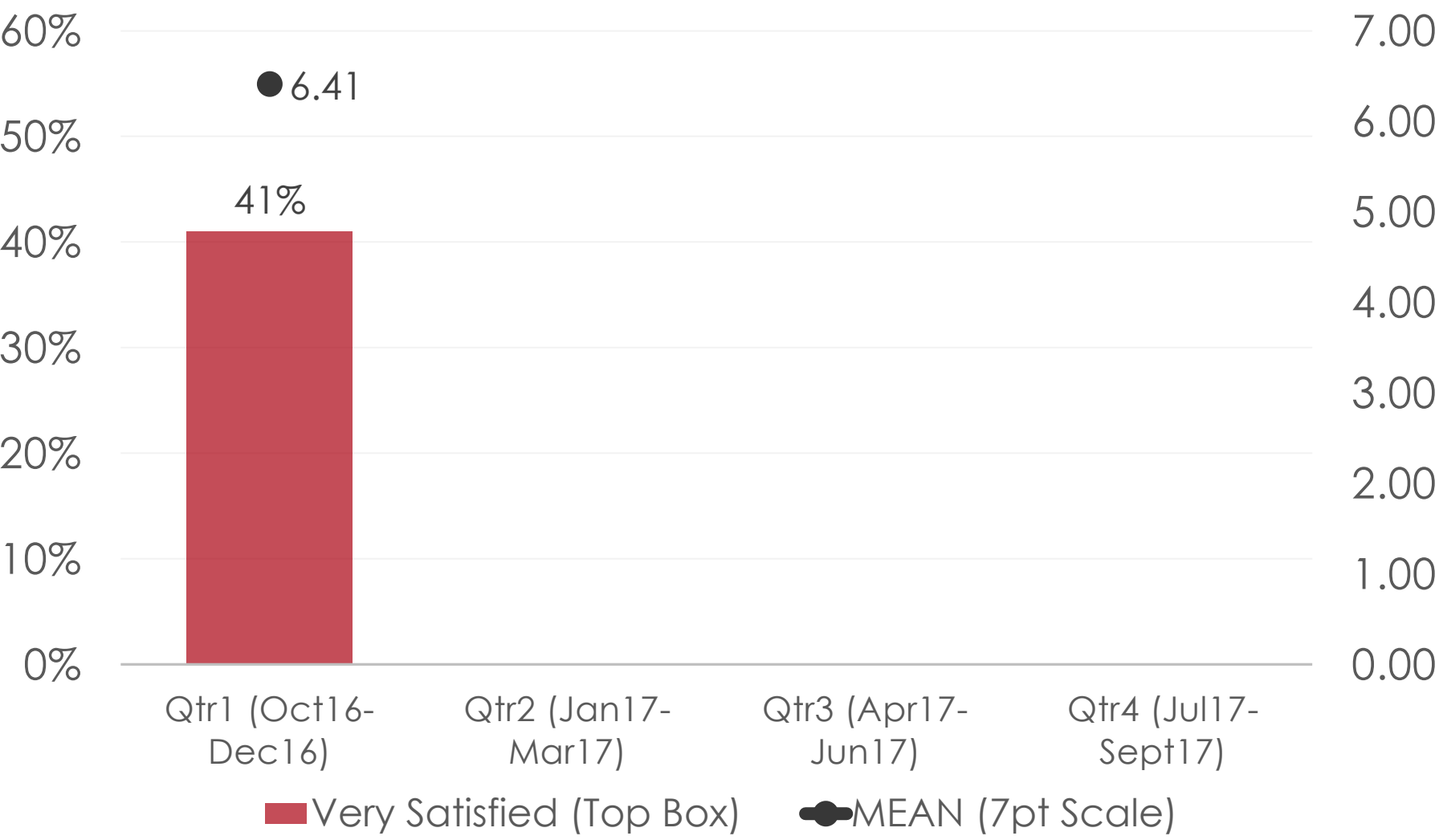
Guam was better than expected

Chart showing Strongly agree percentage and MEAN (7pt Scale) by quarter:
- Qtr1 (Oct16-Dec16): 29%, MEAN 6.20
- Qtr2 (Jan17-Mar17)
- Qtr3 (Apr17-Jun17)
- Qtr4 (Jul17-Sept17)

Legend: ■ Strongly agree ● MEAN (7pt Scale)

70

[A]

I had no communication problems

Strongly agree ● MEAN (7pt Scale)

[A]

I will recommend Guam to friends

Chart showing:
- 6.41 (MEAN point)
- Qtr1 (Oct16-Dec16): 46% Strongly agree

Legend: ■ Strongly agree   ● MEAN (7pt Scale)

X-axis: Qtr1 (Oct16-Dec16), Qtr2 (Jan17-Mar17), Qtr3 (Apr17-Jun17), Qtr4 (Jul17-Sept17)

Left Y-axis: 0% – 60%
Right Y-axis: 0.00 – 7.00

[A]
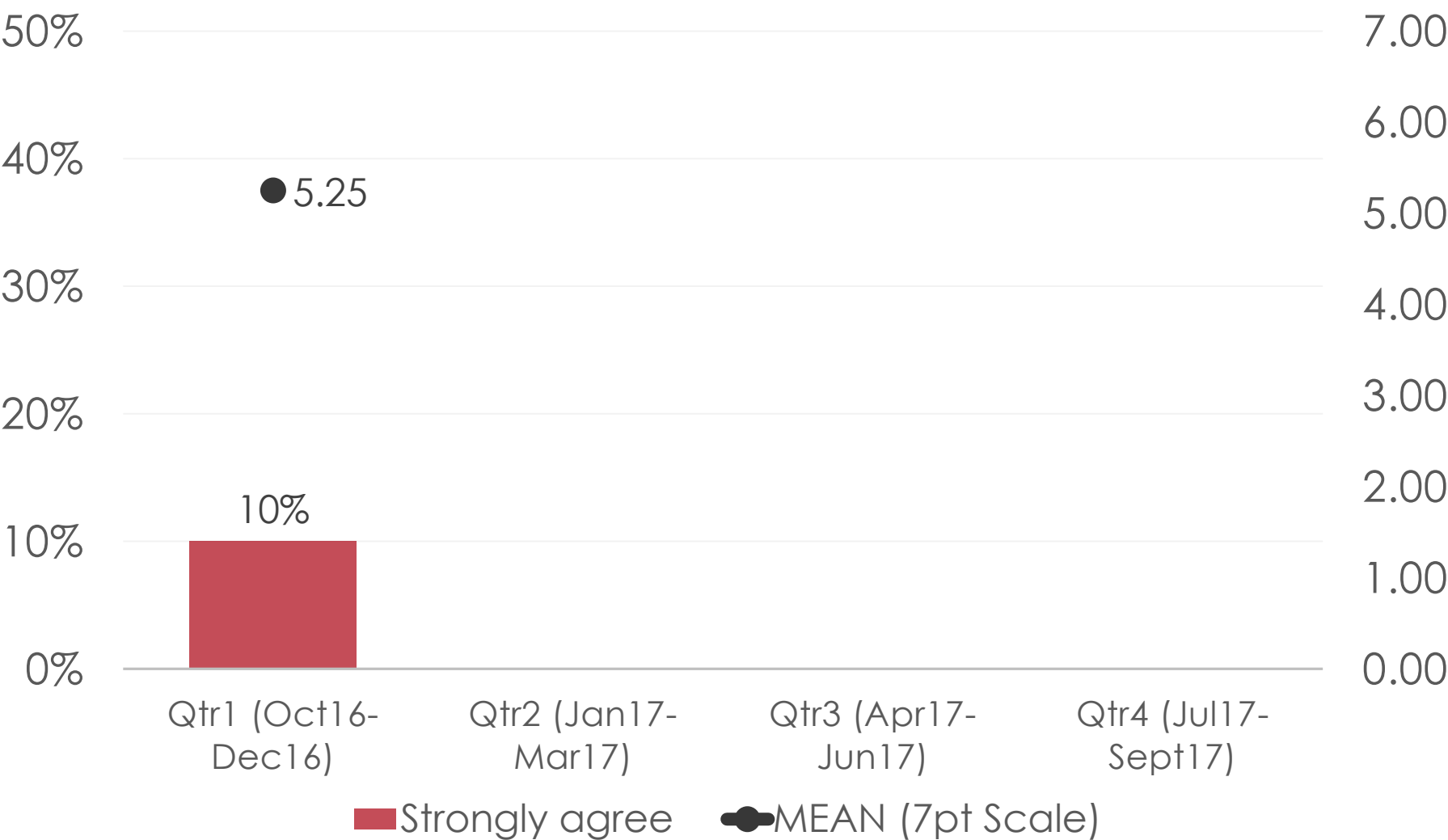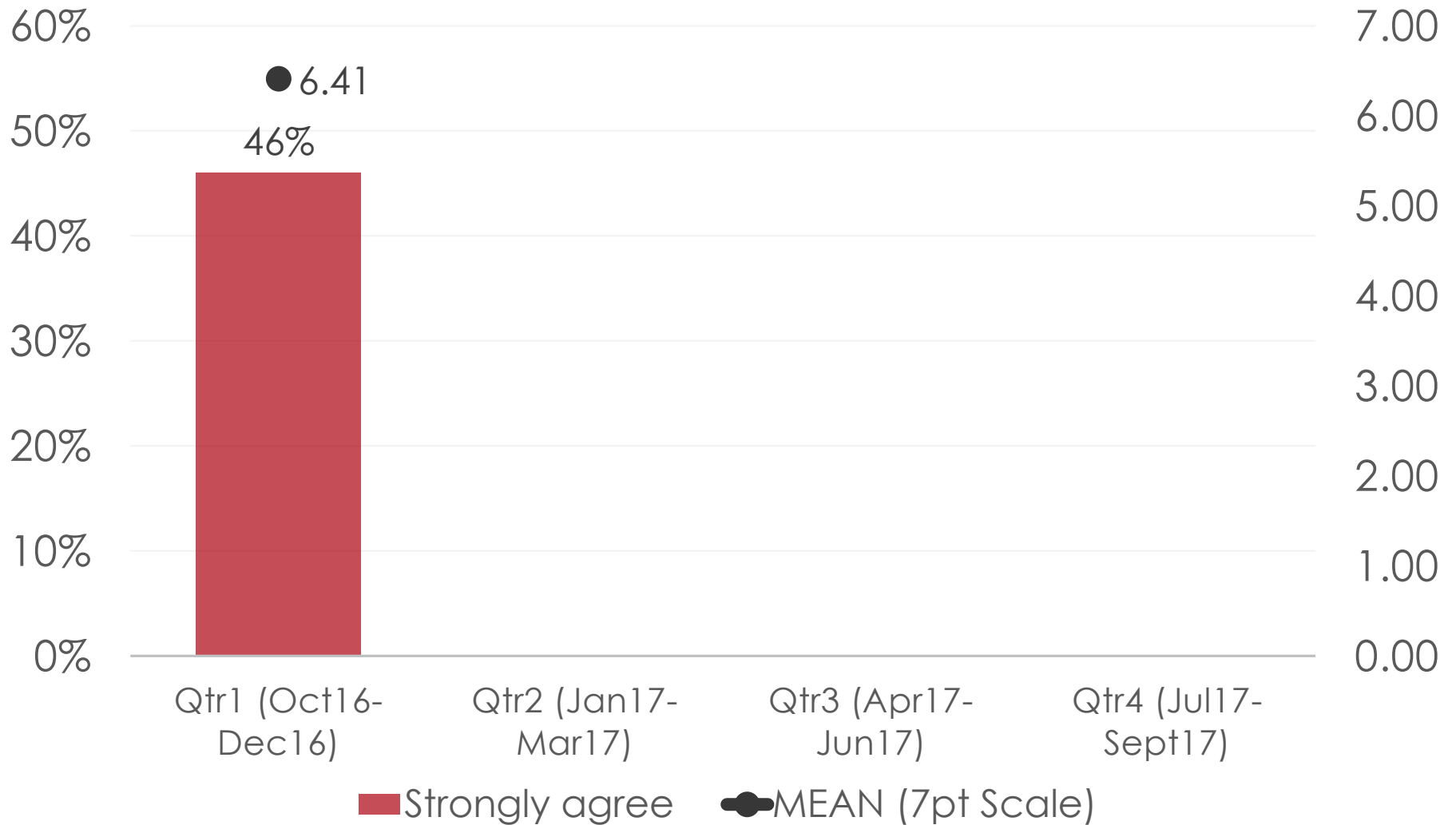
Sites on Guam were attractive
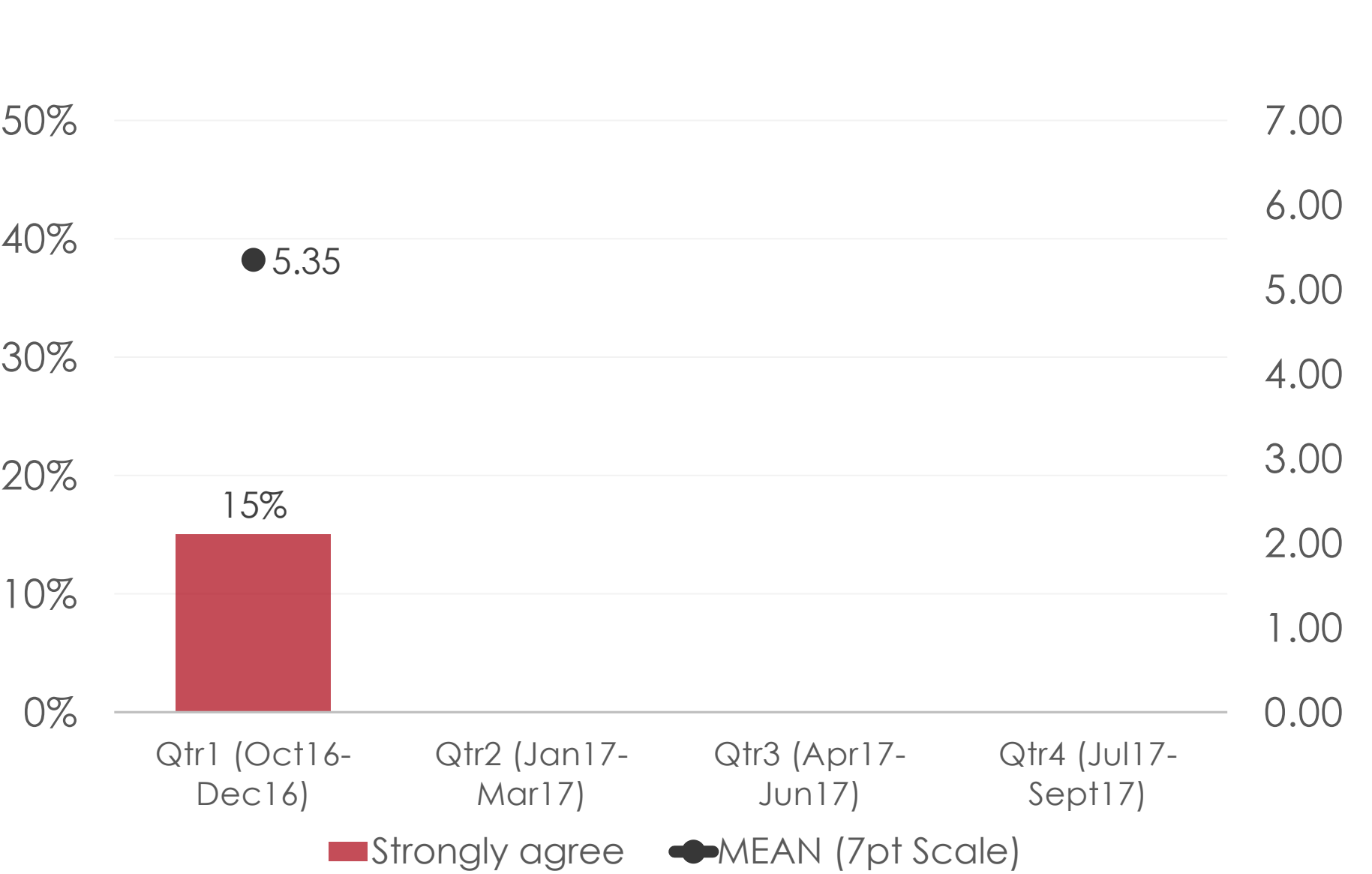
I plan to visit Guam again

- 70%
- 60%
- 50% — 53%
- 40%
- 30%
- 20%
- 10%
- 0%

● 6.42

Right axis: 7.00 / 6.00 / 5.00 / 4.00 / 3.00 / 2.00 / 1.00 / 0.00

Qtr1 (Oct16-Dec16)   Qtr2 (Jan17-Mar17)   Qtr3 (Apr17-Jun17)   Qtr4 (Jul17-Sept17)

■ Strongly agree   ●— MEAN (7pt Scale)

[A]
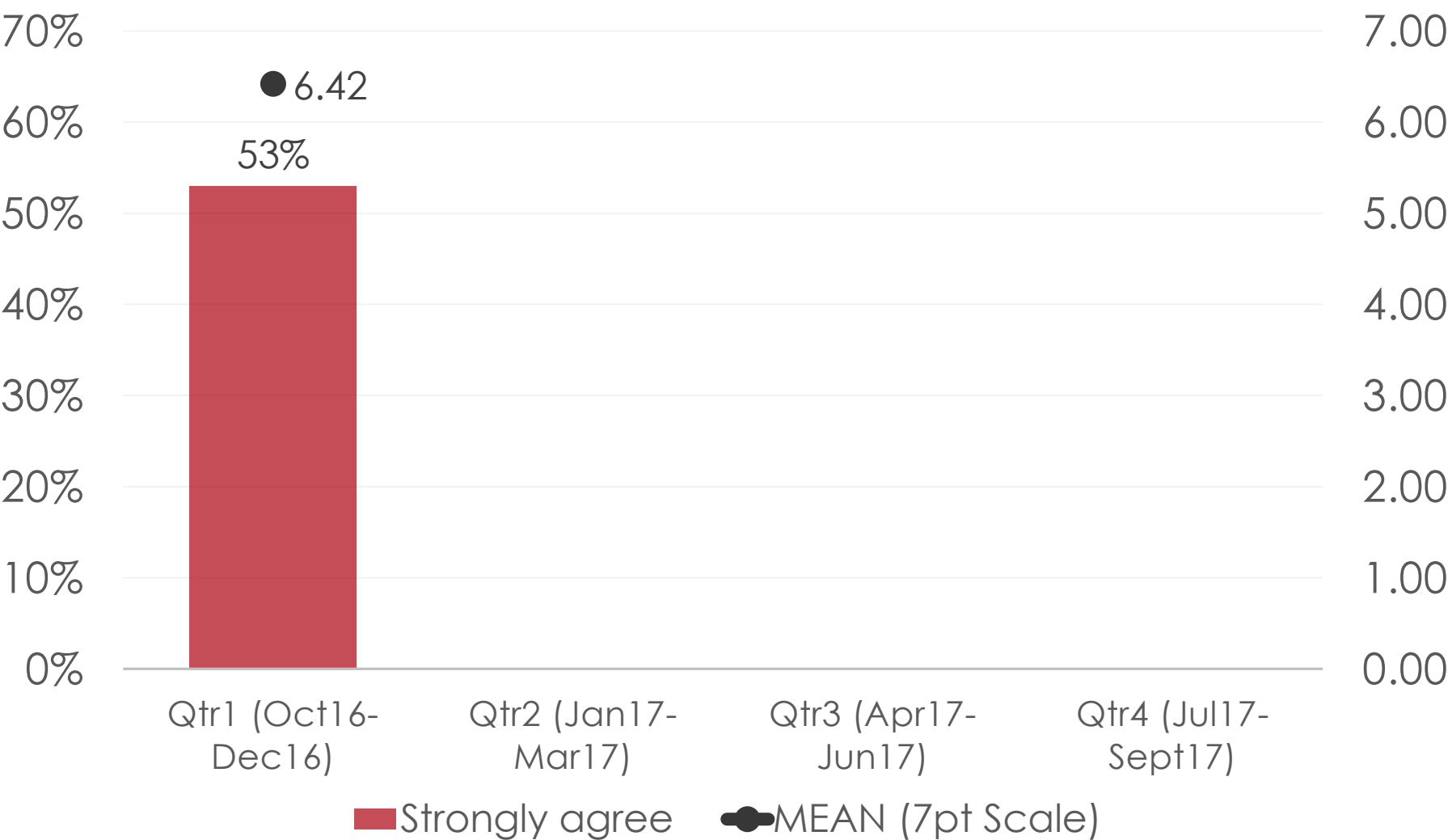
Not enough night time activities

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |

● 4.28

■ Strongly agree   ●─ MEAN (7pt Scale)

[A]
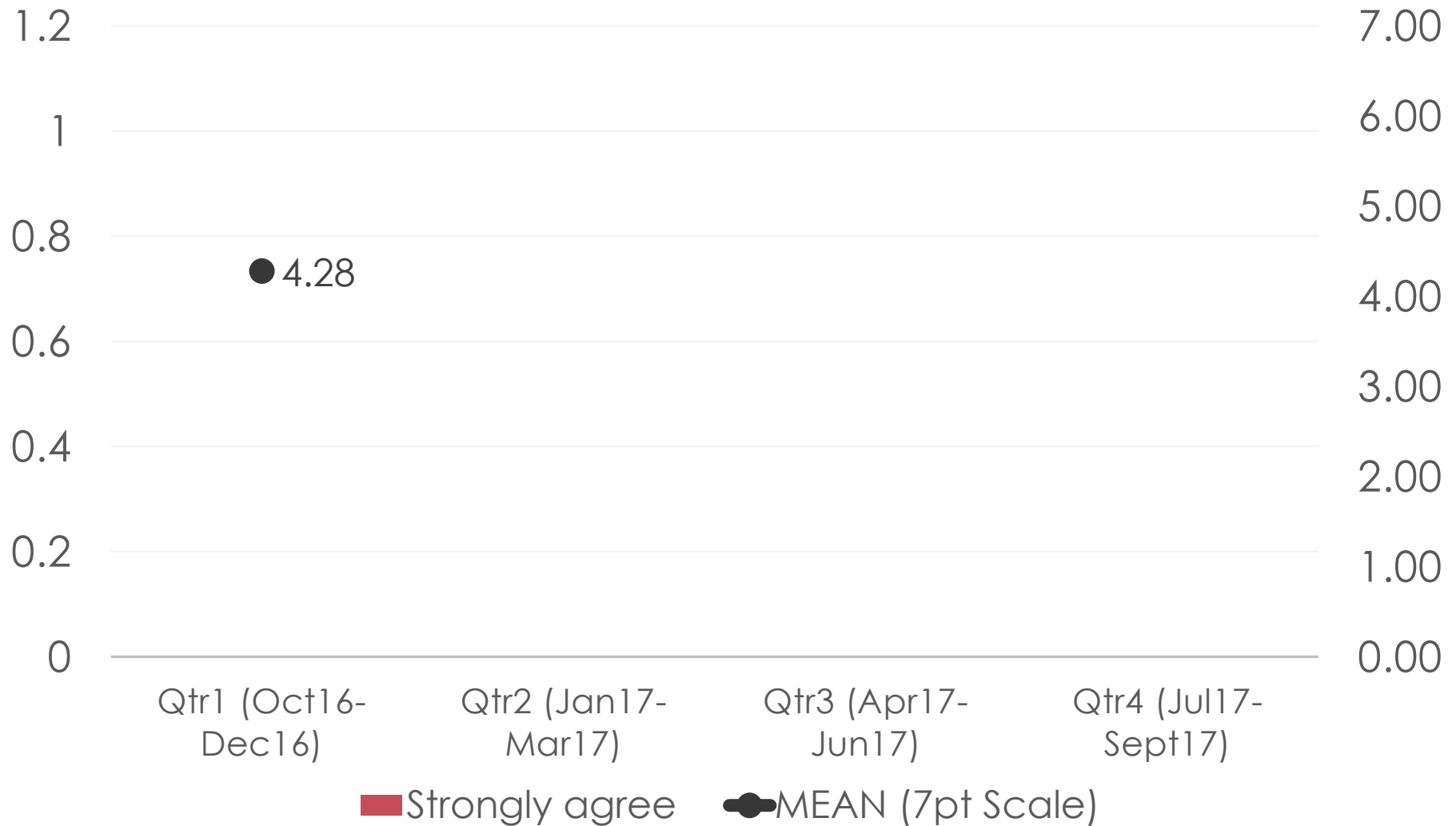
Tour guides were professional

Tour drivers were professional

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |

● 5.11

10%

■ Strongly agree   ●MEAN (7pt Scale)

[A]

Taxi drivers were professional

78

Taxis were clean

Chart showing "Taxis were clean" survey results by quarter.

- Qtr1 (Oct16-Dec16): Strongly agree 4%, MEAN (7pt Scale) 5.65
- Qtr2 (Jan17-Mar17)
- Qtr3 (Apr17-Jun17)
- Qtr4 (Jul17-Sept17)

Left axis: 0% – 50%
Right axis: 0.00 – 7.00

Legend: Strongly agree | MEAN (7pt Scale)

[A]

Guam airport was clean

50%
40%
30%
20%
10%
0%

7.00
6.00
5.00
4.00
3.00
2.00
1.00
0.00

● 6.29
38%

Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17)

■ Strongly agree   ●—MEAN (7pt Scale)

[A]

GENERAL SATISFACTION

GENERAL SATISFACTION –
Quality/ Cleanliness

Legend: Very Satisfied (Top Box) ■ ; MEAN (7pt Scale) ●—●

Categories and values:
- Beaches/ Parks: 63%, 6.63
- Air/ Sky: 65%, 6.65
- Parks: 38%, 6.38
- Landscape Tumon: 49%, 6.49
- Landscape Guam: 24%, 6.20
- Ground Handler: 48%, 6.47
- Transportation vehicle: 29%, 6.28

[A]
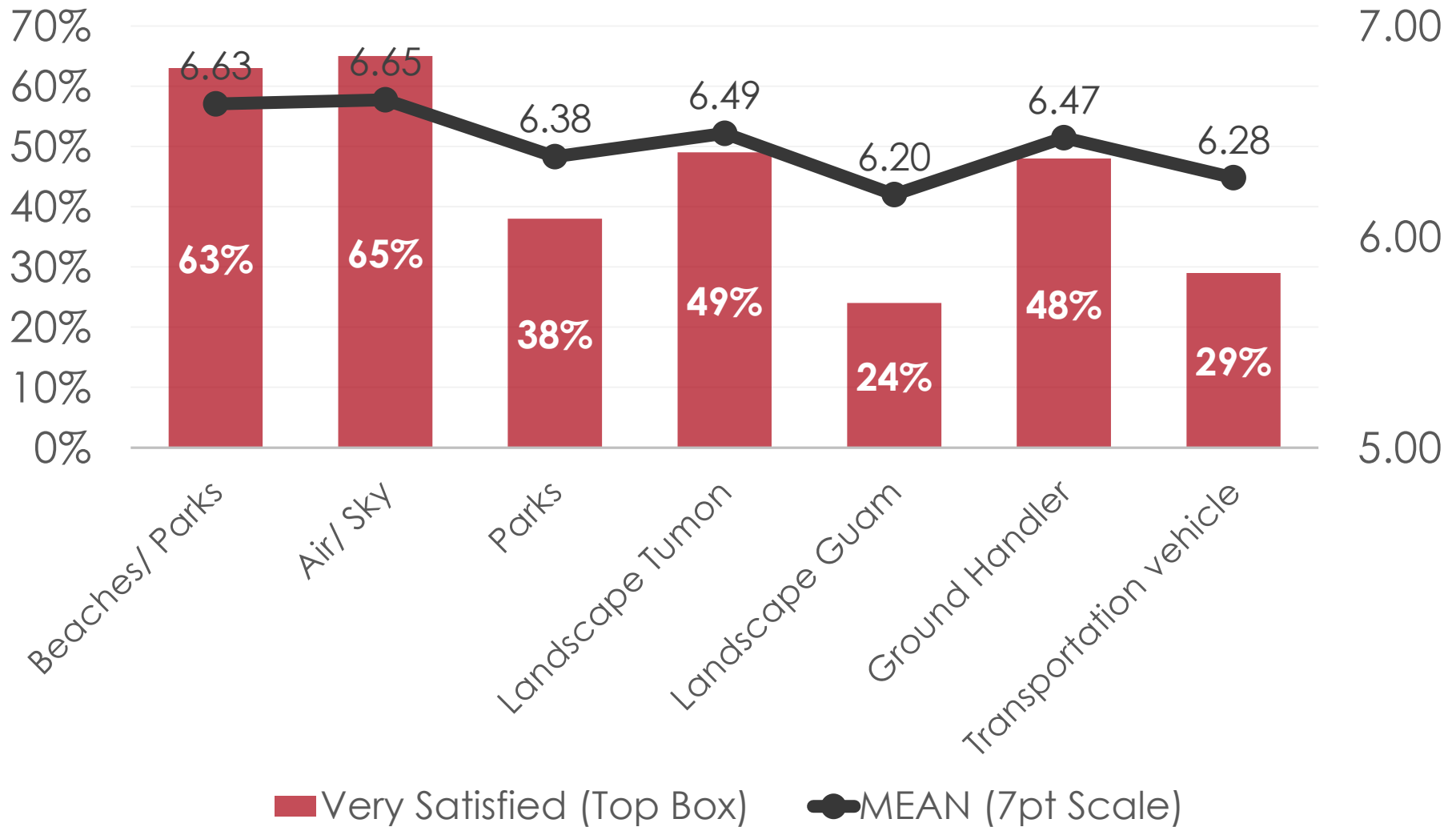
ACCOMMODATIONS –
OVERALL SATISFACTION

50% | 7.00

● 6.28

40% | 6.00

| 5.00

29% | 4.00
30%

20% | 3.00

| 2.00

10% | 1.00

0% | 0.00

Qtr1 (Oct16-Dec16) — Qtr2 (Jan17-Mar17) — Qtr3 (Apr17-Jun17) — Qtr4 (Jul17-Sept17)

■ Very Satisfied (Top Box) ━●━ MEAN (7pt Scale)

[A]
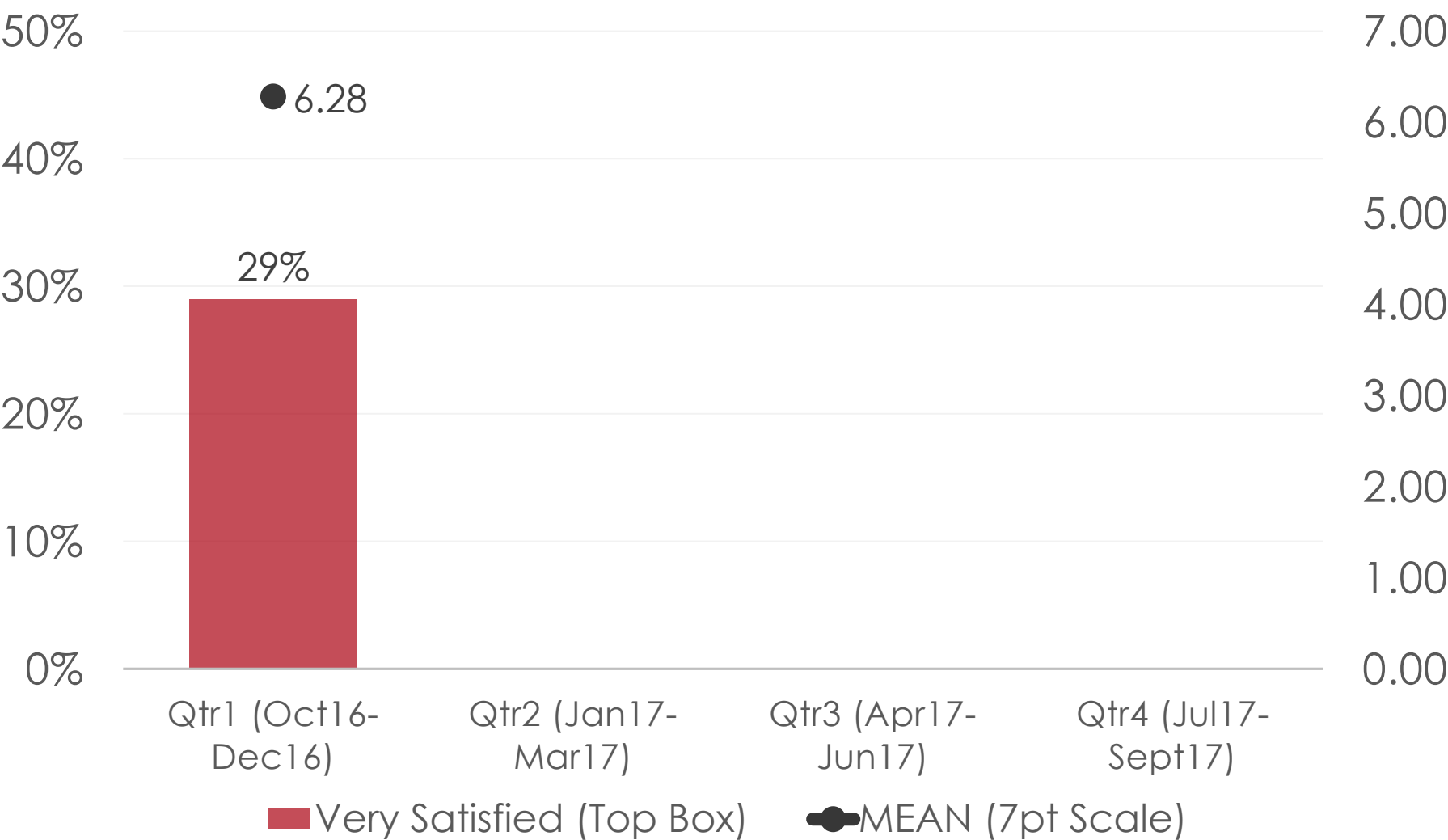
ACCOMMODATIONS –
Satisfaction by Category

Very Satisfied (Top Box) — MEAN (7pt Scale)

Category	Very Satisfied (Top Box)	MEAN (7pt Scale)
Room	32%	6.26
View	37%	6.26
Furnishings	22%	6.11
Cleanliness	15%	6.06
Food- Quality	41%	6.38
Food- Quantity	45%	6.44
Staff	38%	6.33
Service	30%	6.29
Value	19%	6.14

[A]
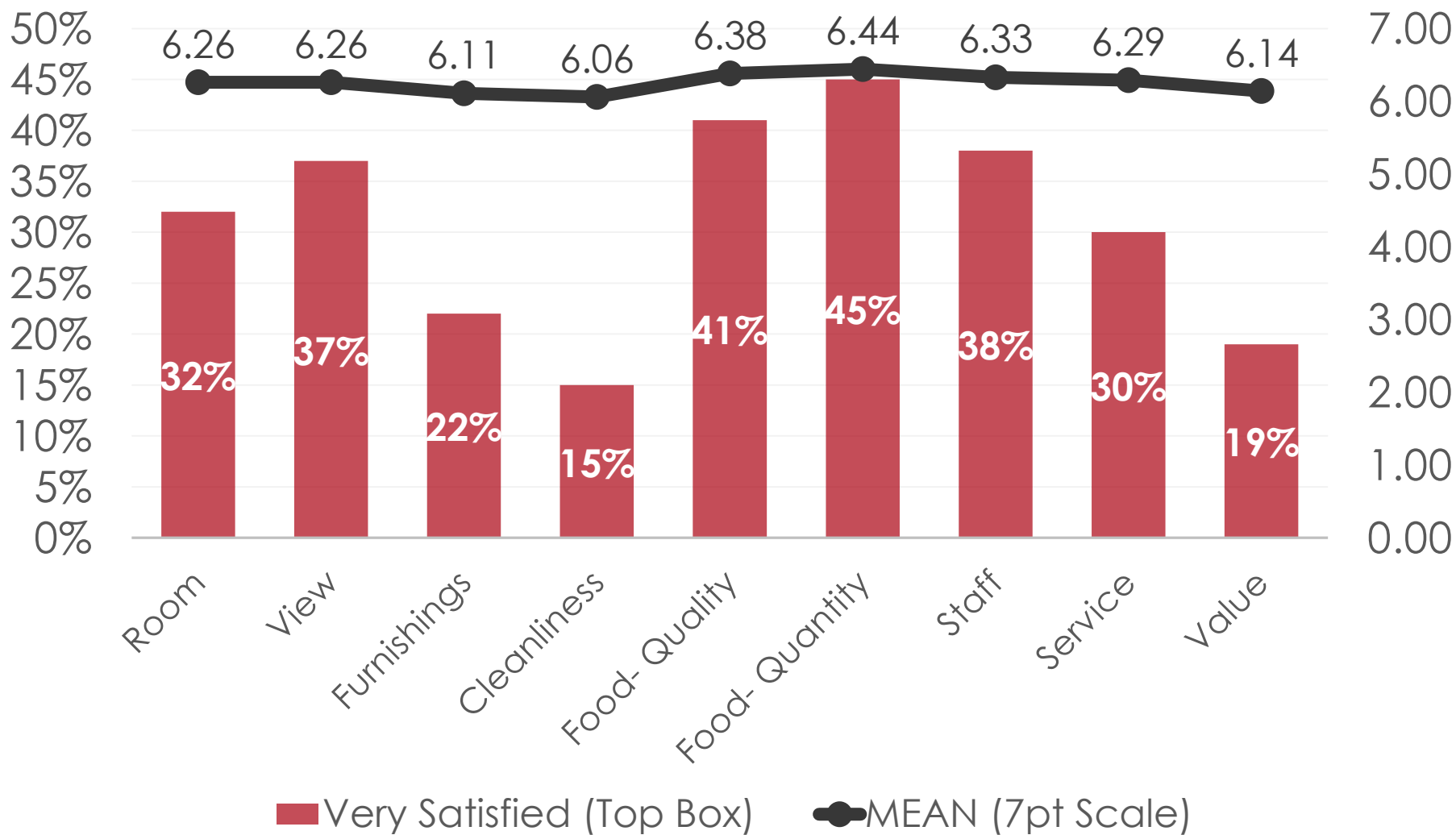
DINING EXPERIENCE (Outside Hotel) –
Satisfaction by Category

Very Satisfied (Top Box) — MEAN (7pt Scale)

[A]
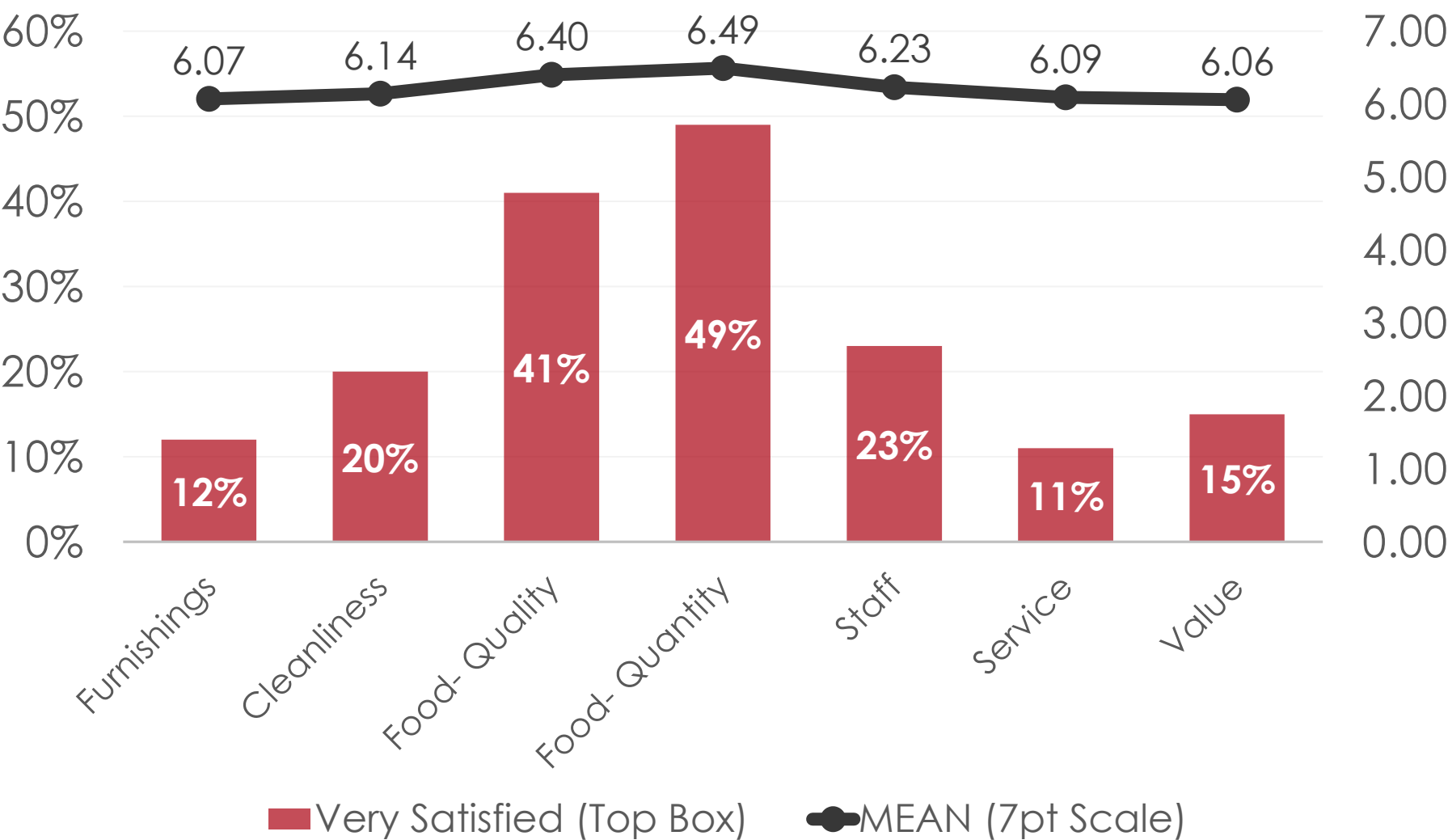
Shopping Malls/ Stores (Top Responses)

Store	Percentage
Ross	80%
Guam Premium Outlet	75%
Micro Mall	72%
K-Mart	70%
Macys	70%
DFS Galleria	34%
ABC Store	24%
JP Super	22%
The Plaza	22%
Tumon Sands	20%

[A]
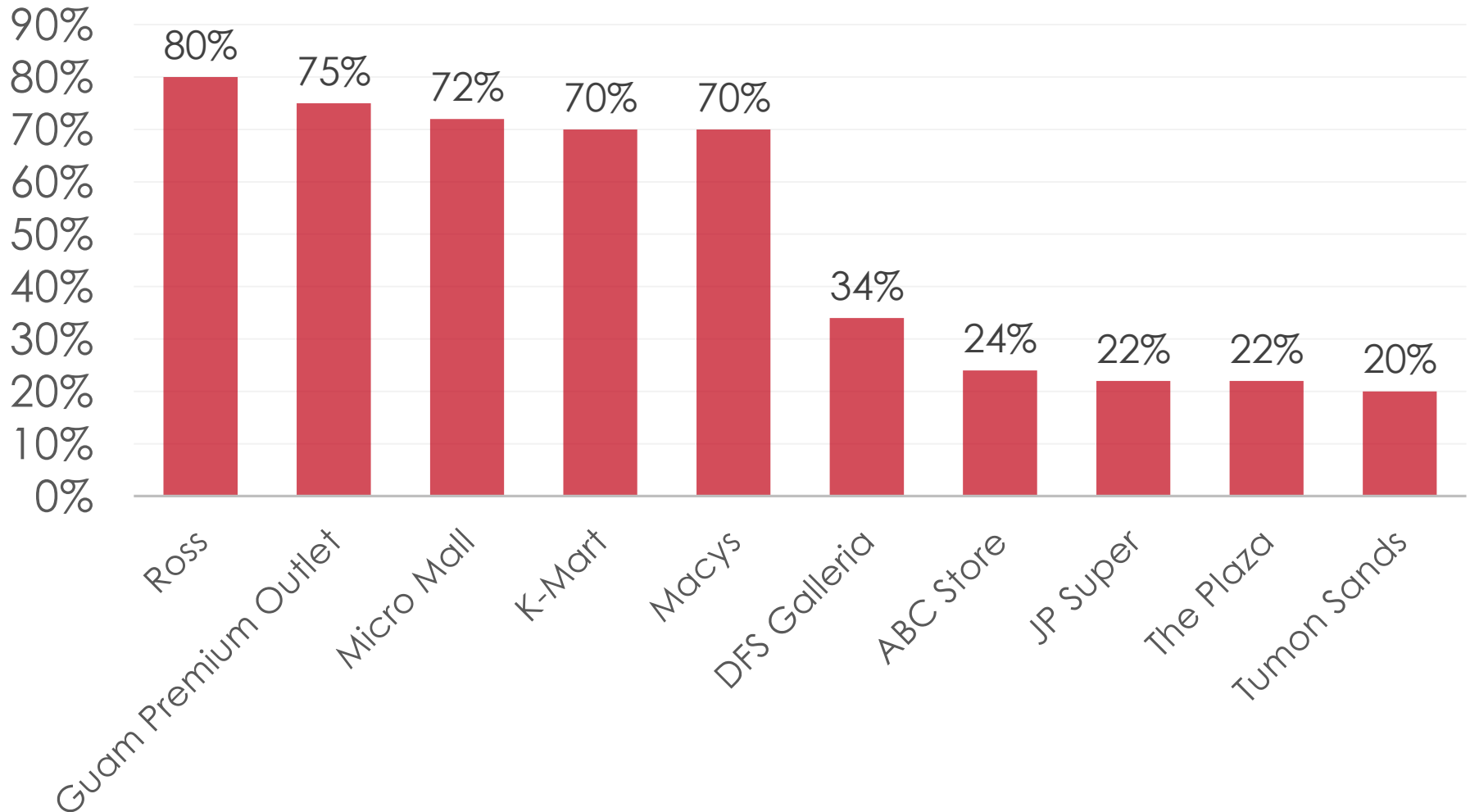
SHOPPING - SATISFACTION
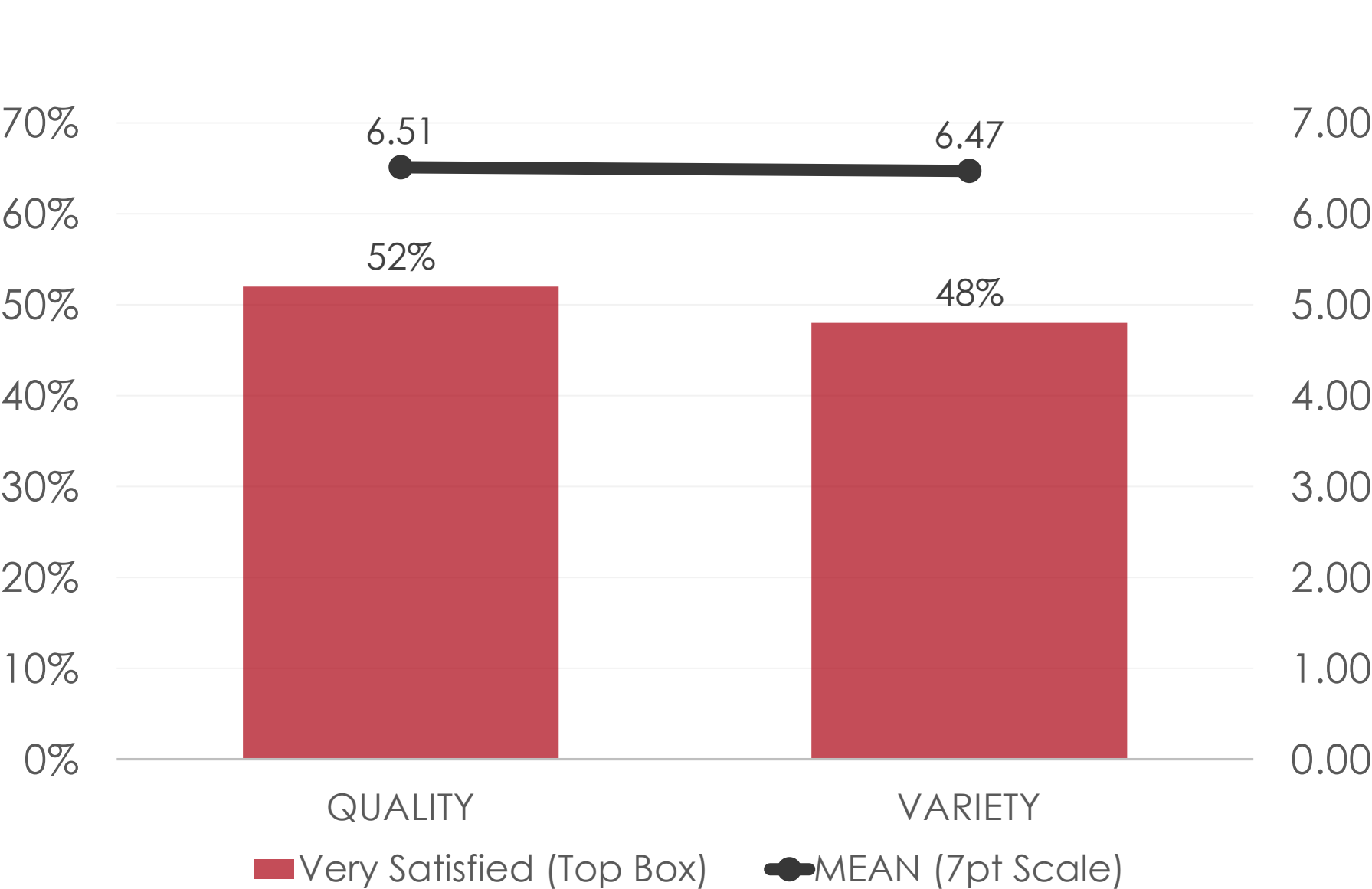
OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

[A]
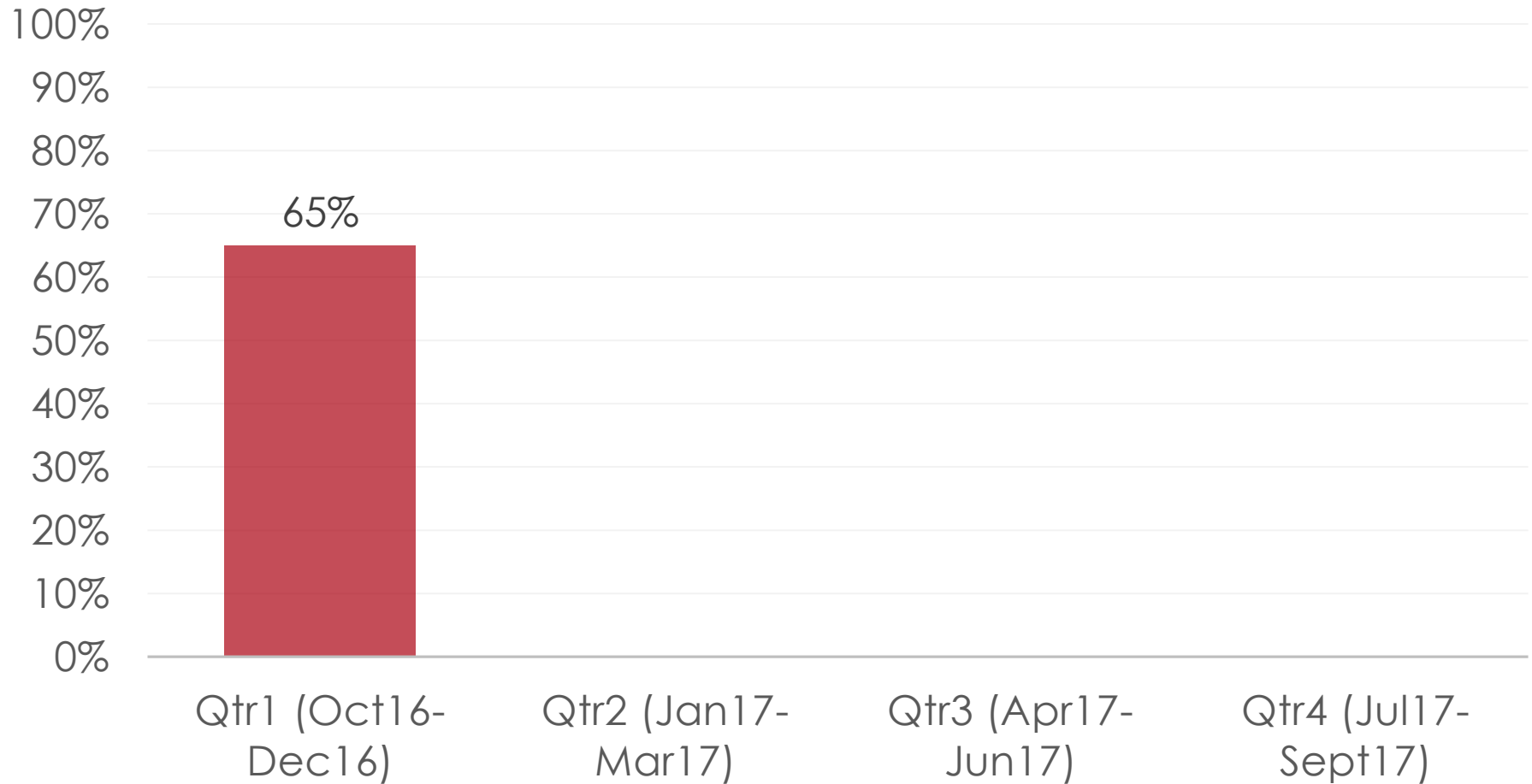
Optional Tour Participation (Top Responses)

[A]
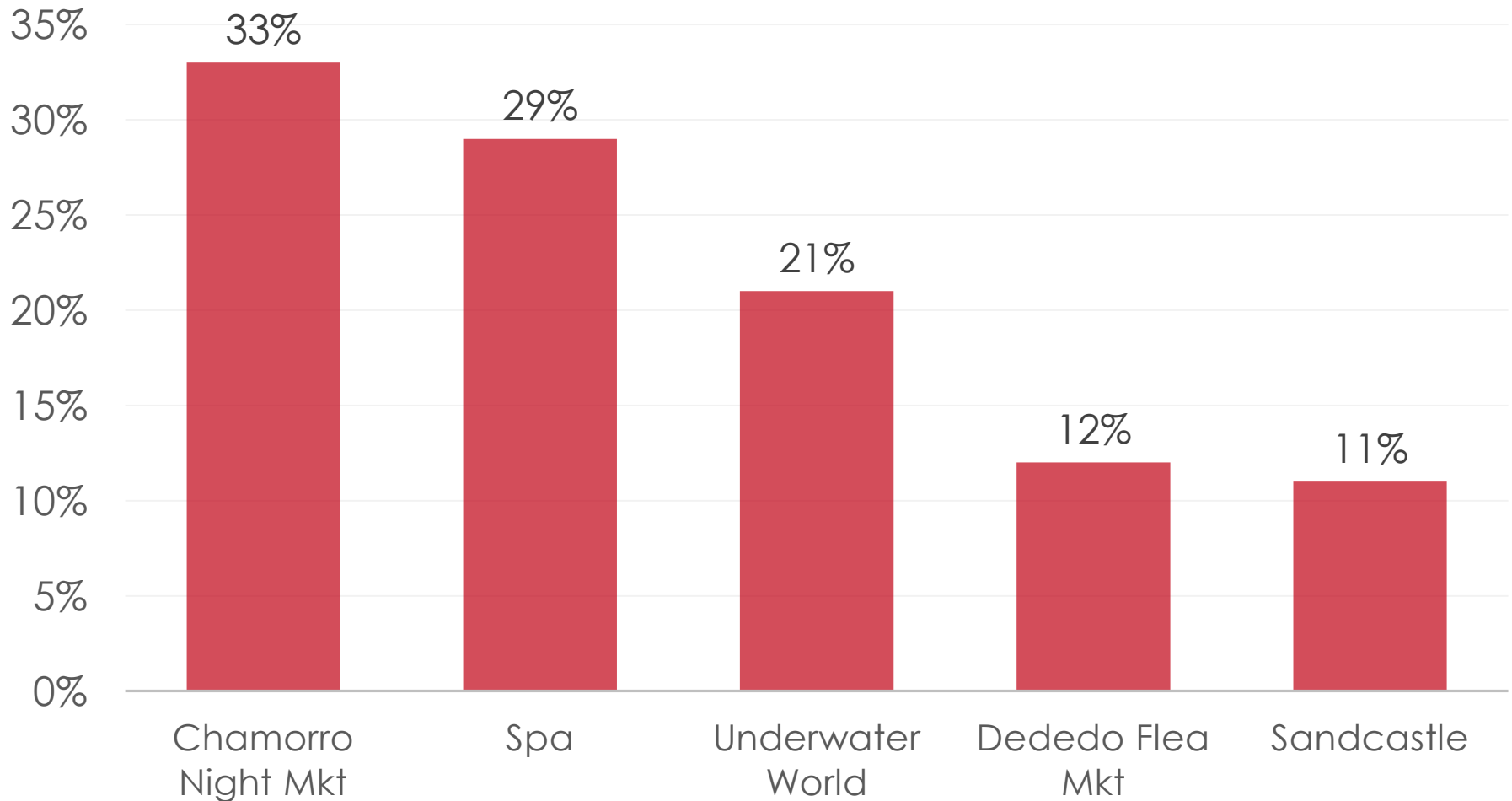
Optional Tour Satisfaction
Top Responses only - Participation (10%+)

Legend: Very Satisfied (Top Box) ■ ● MEAN (7pt Scale)

Tour	Very Satisfied (Top Box)	MEAN (7pt Scale)
Chamorro Night Market	22%	6.15
Spa	54%	6.54
Underwater World	65%	6.65
Dededo Flea Mkt	20%	5.40
Sandcastle	67%	6.67

[A]

DAY TOUR - SATISFACTION

Very Satisfied (Top Box)　　MEAN (7pt Scale)

[A]

NIGHT TOUR - SATISFACTION

Chart legend: Very Satisfied (Top Box) — MEAN (7pt Scale)

QUALITY: 36%, 6.14
VARIETY: 29%, 6.07

[A]

Activities Participation (Top Responses)

A bar chart showing activities participation percentages:
- Shopping: 96%
- Snorkle: 71%
- Sightsee: 45%
- Two-Lovers Pt: 21%
- Dinner Show: 9%
- Beach Res: 8%
- River/ Jungle Cruise: 3%
- Water Park: 1%
- Jet Ski: 1%

[A]

SECTION 5
PROMOTIONS

[A]

INTERNET- GUAM SOURCES OF INFORMATION

[A]
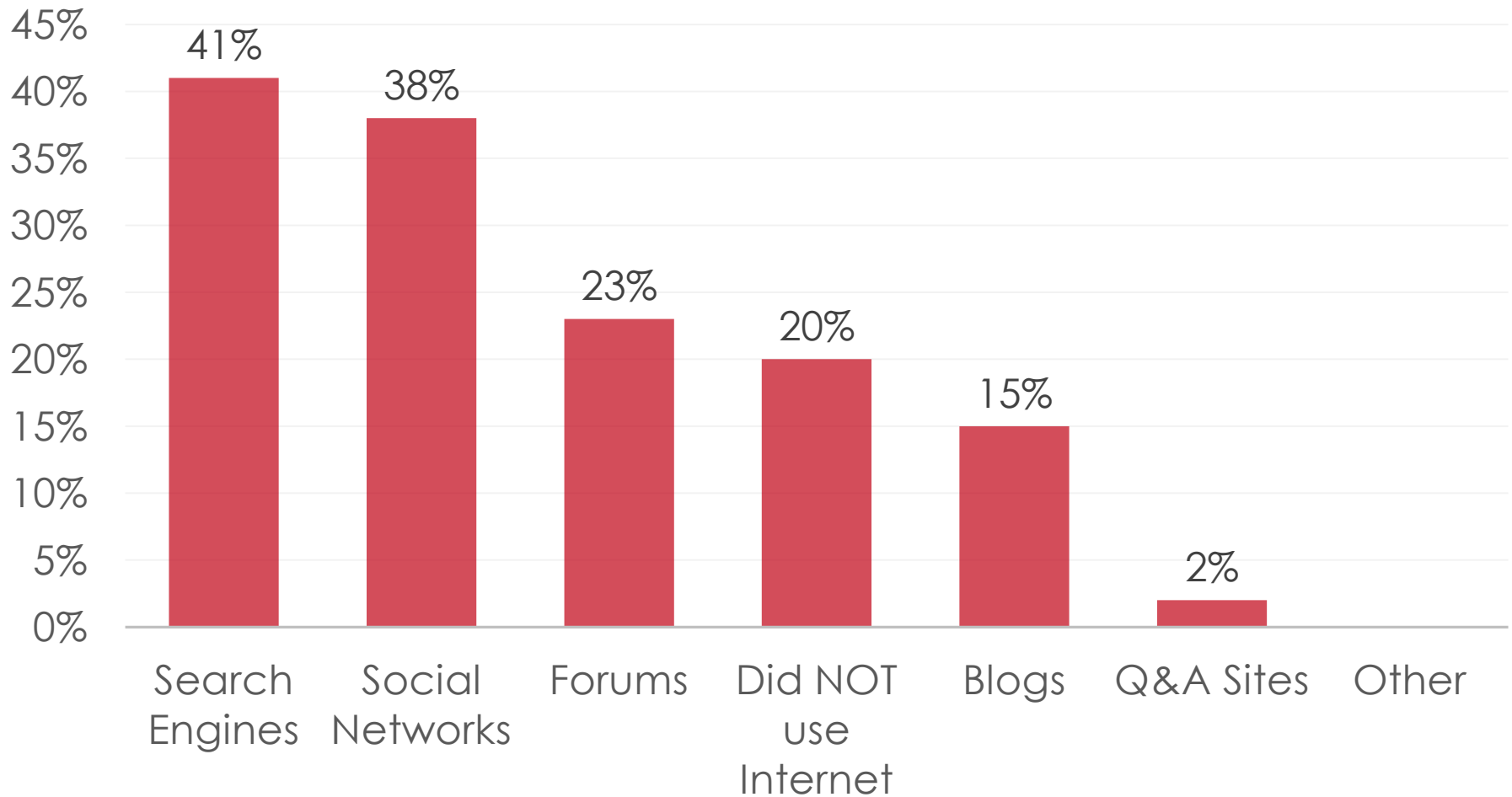
INTERNET- SOURCES OF INFORMATION
Things to do on Guam

[A]
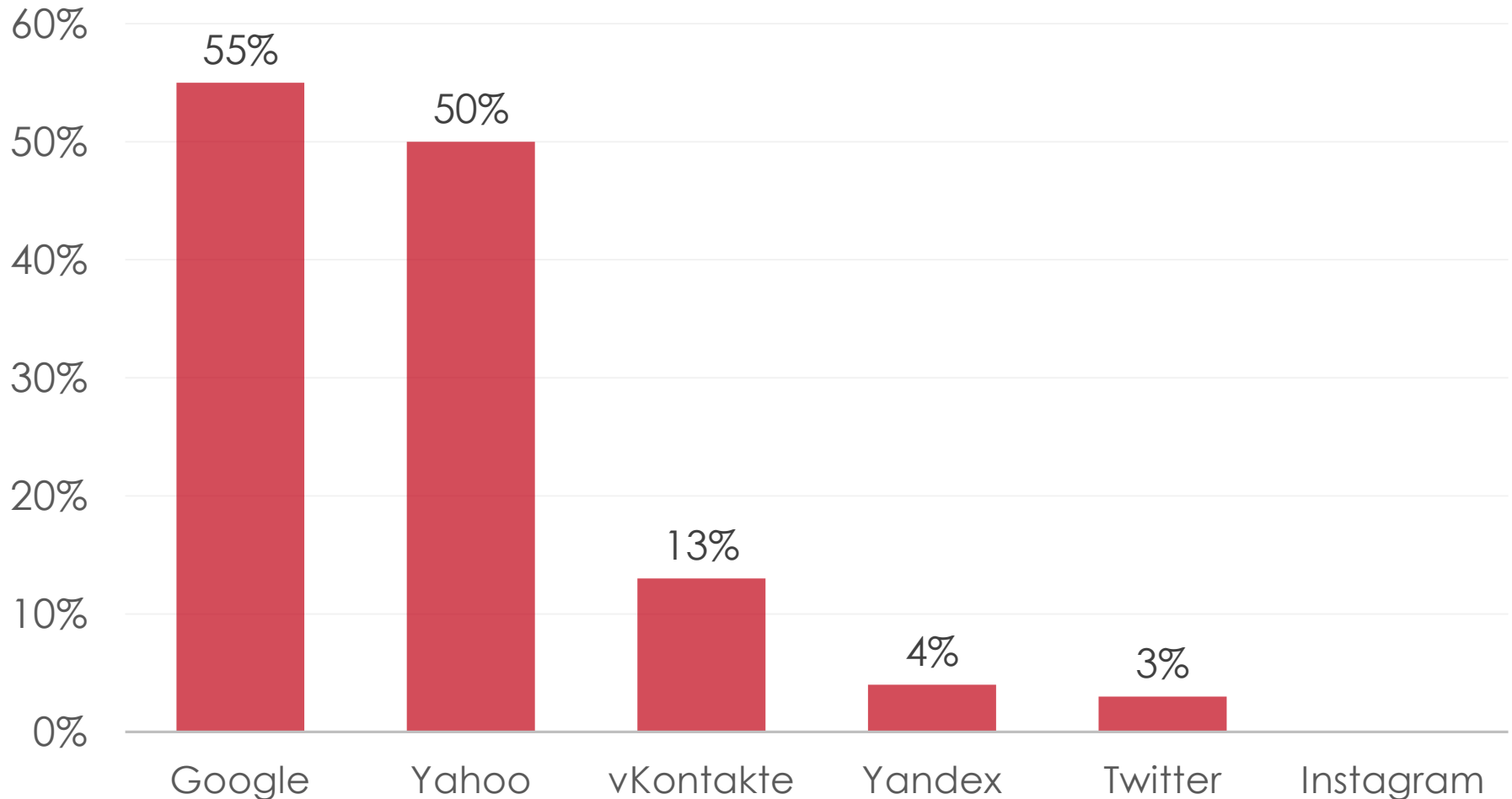
INTERNET- SOURCES OF INFORMATION GVB

[A]

TRAVEL MOTIVATION

[A]

PRE-ARRIVAL
SOURCES OF INFOMATION

[A]
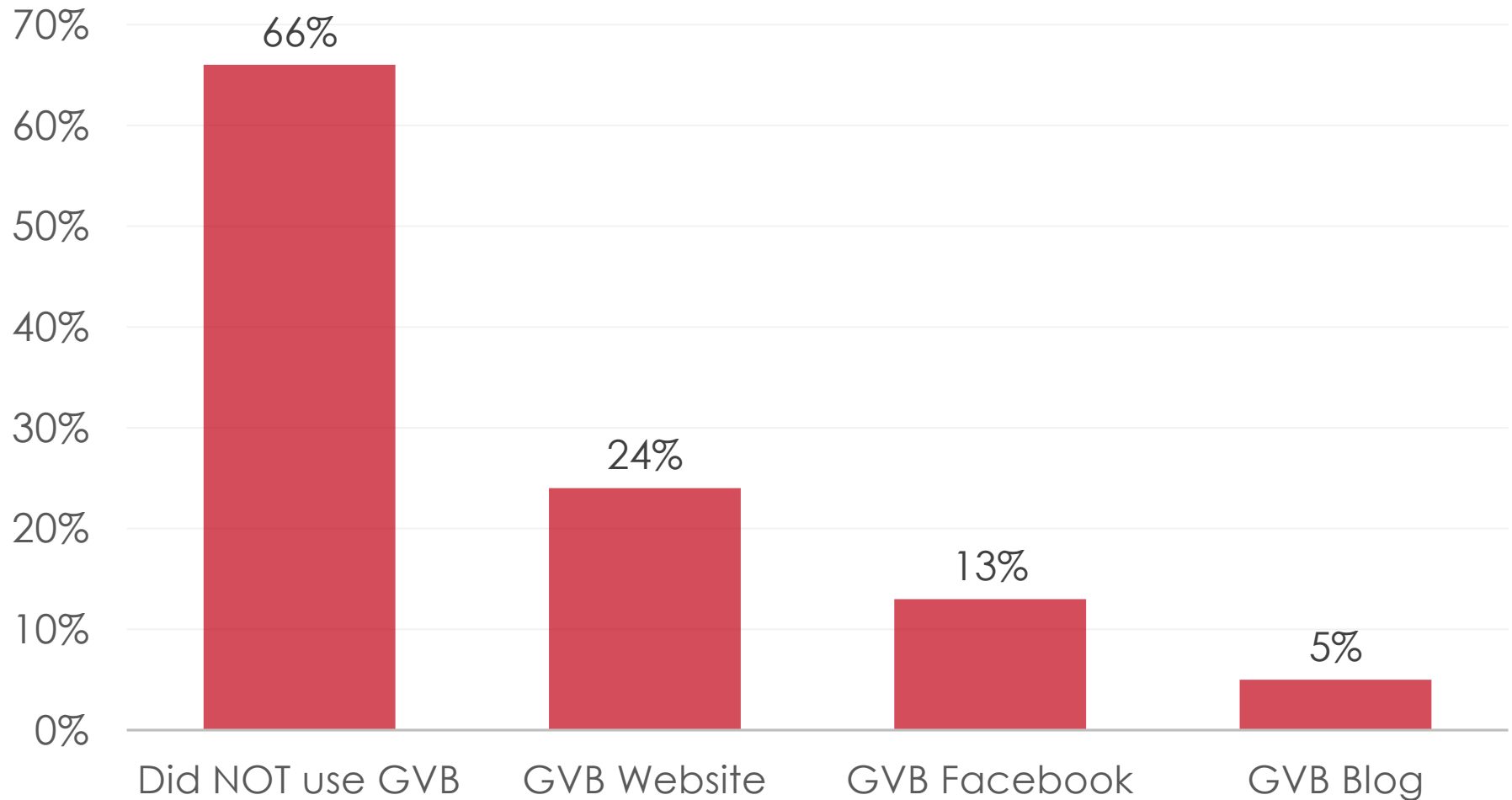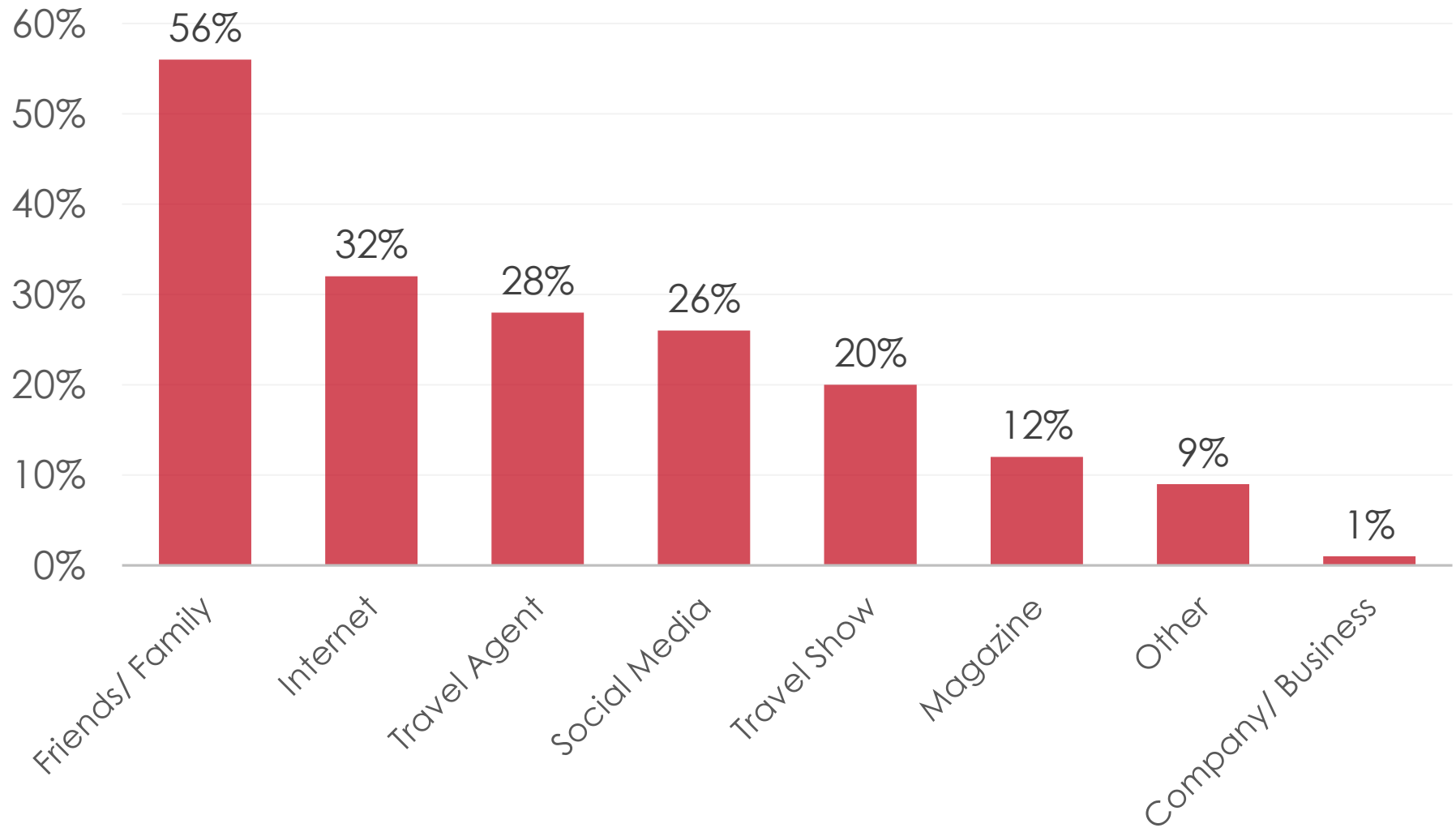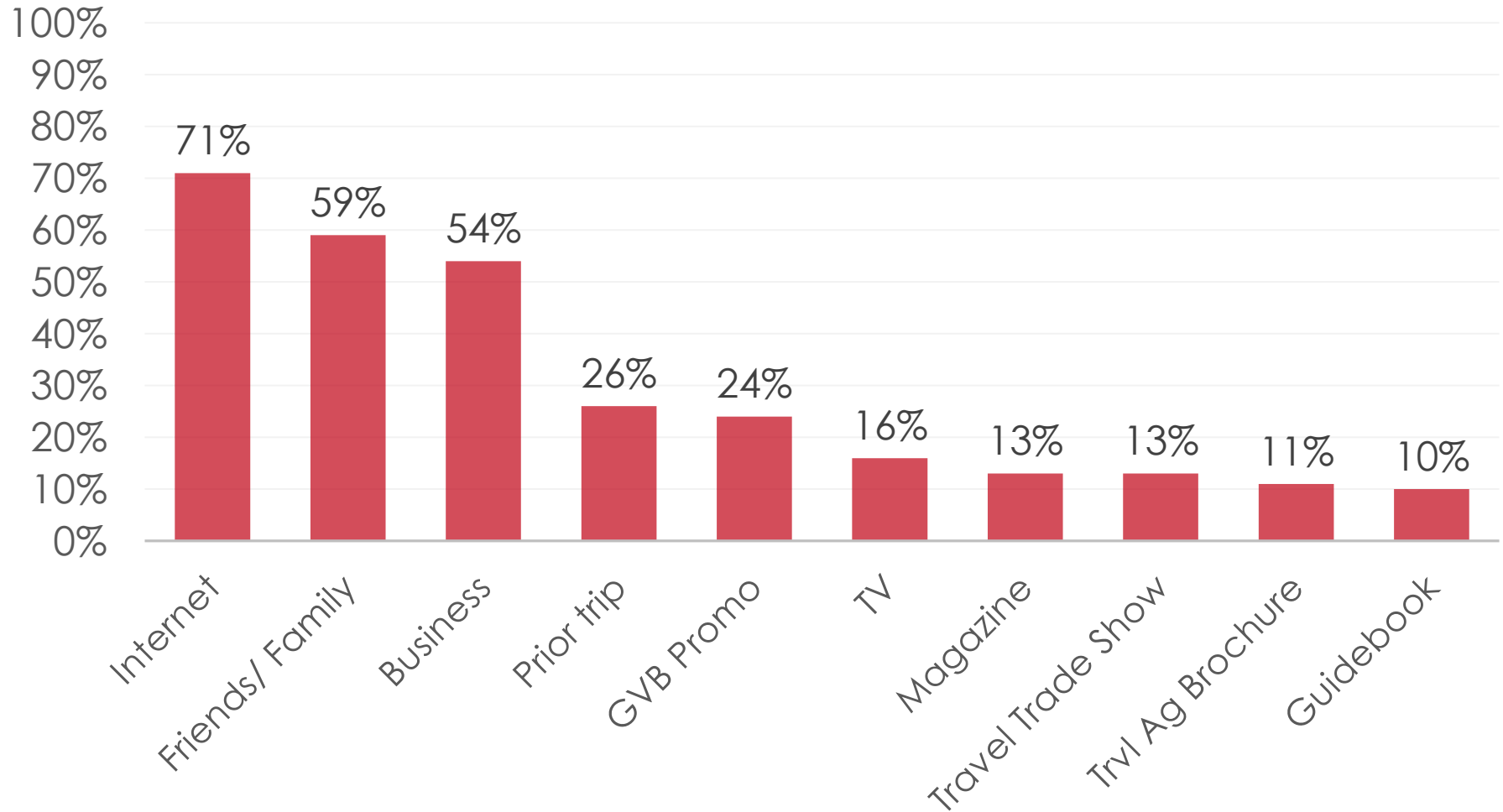
PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments
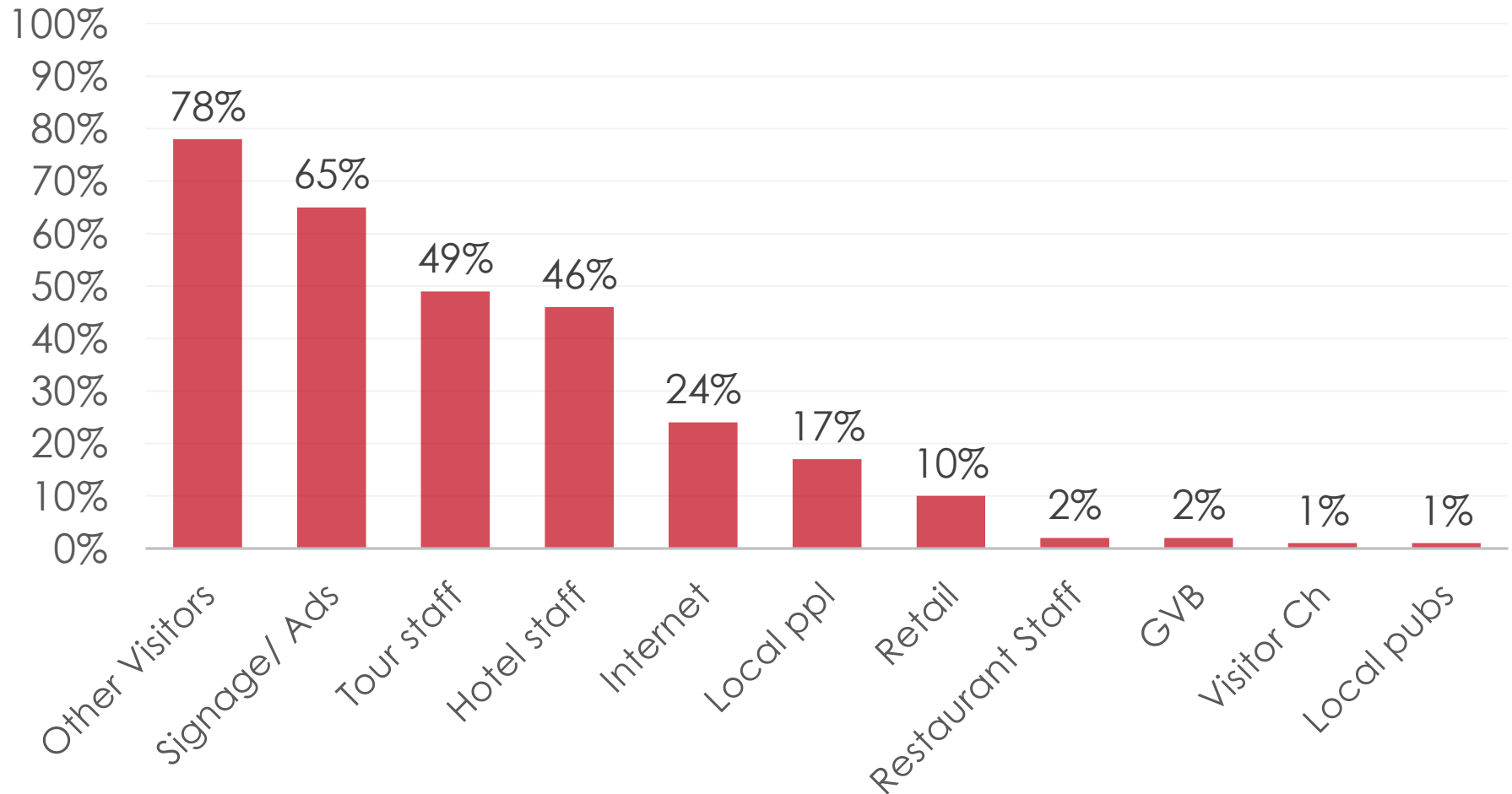
GUAM VISITORS BUREAU - EXIT SURVEY

Q1 Please select the top 3 sources of information you used to find out about Guam before you trip.

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
Q1	Internet	71%	74%	61%	73%	100%	100%	75%
	Friend/ Relative	59%	63%	75%	63%		100%	61%
	Co-Worker/ Company Trvl Dept	54%	47%	57%	48%	100%	100%	54%
	Prior Trip	26%	30%	29%	29%			21%
	GVB Promo	24%	25%	14%	23%			28%
	TV	16%	16%	18%	17%			18%
	Travel Trade Show	13%	12%	7%	13%			14%
	Magazine (Consumer)	13%	11%	14%	10%			14%
	Travel Agent Brochure	11%	11%	7%	10%			11%
	Travel Guidebook-Bookstore	10%	9%	7%	8%	100%		9%
	Consumer Trvl Show	5%	5%	4%	6%			2%
	Radio	1%	2%	4%	2%			
	Total	82	57	28	52	1	1	57

Prepared by QMark Research

100

ONISLE
SOURCES OF INFOMATION

[A]

ON-ISLE SOURCES OF INFORMATION – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q2 Please select the top 3 sources of information you used to find out about Guam while you were here.

|		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
Q2	Other Visitors	78%	86%	89%	87%		100%	82%
	Signs/ Advertisement	65%	67%	71%	63%			61%
	Tour Staff	49%	42%	43%	44%	100%		46%
	Hotel Staff	46%	46%	43%	44%	100%	100%	47%
	Internet	24%	28%	25%	27%	100%		23%
	Local Ppl	17%	14%	18%	13%			16%
	Retail Staff	10%	9%	4%	10%		100%	14%
	GVB	2%	2%		2%			4%
	Restaurant Staff	2%	4%	4%	4%			4%
	Local Publication	1%						2%
	Visitor Channel	1%	2%		2%			
	Total	82	57	28	52	1	1	57

Prepared by QMark Research

[A]

SECTION 6
FUTURE TRAVEL TO GUAM

[A]

What would it take to make you stay an extra day on Guam?
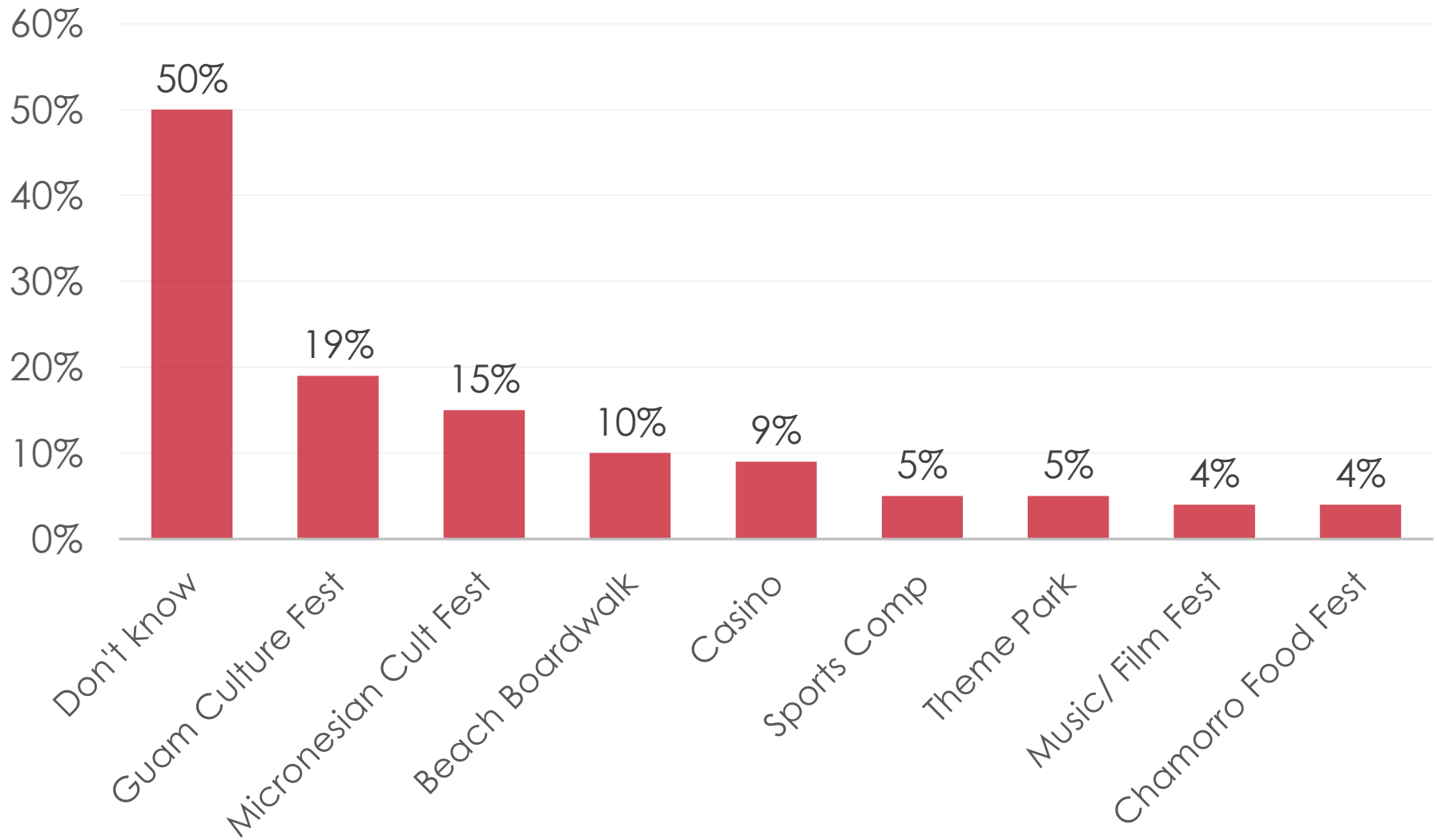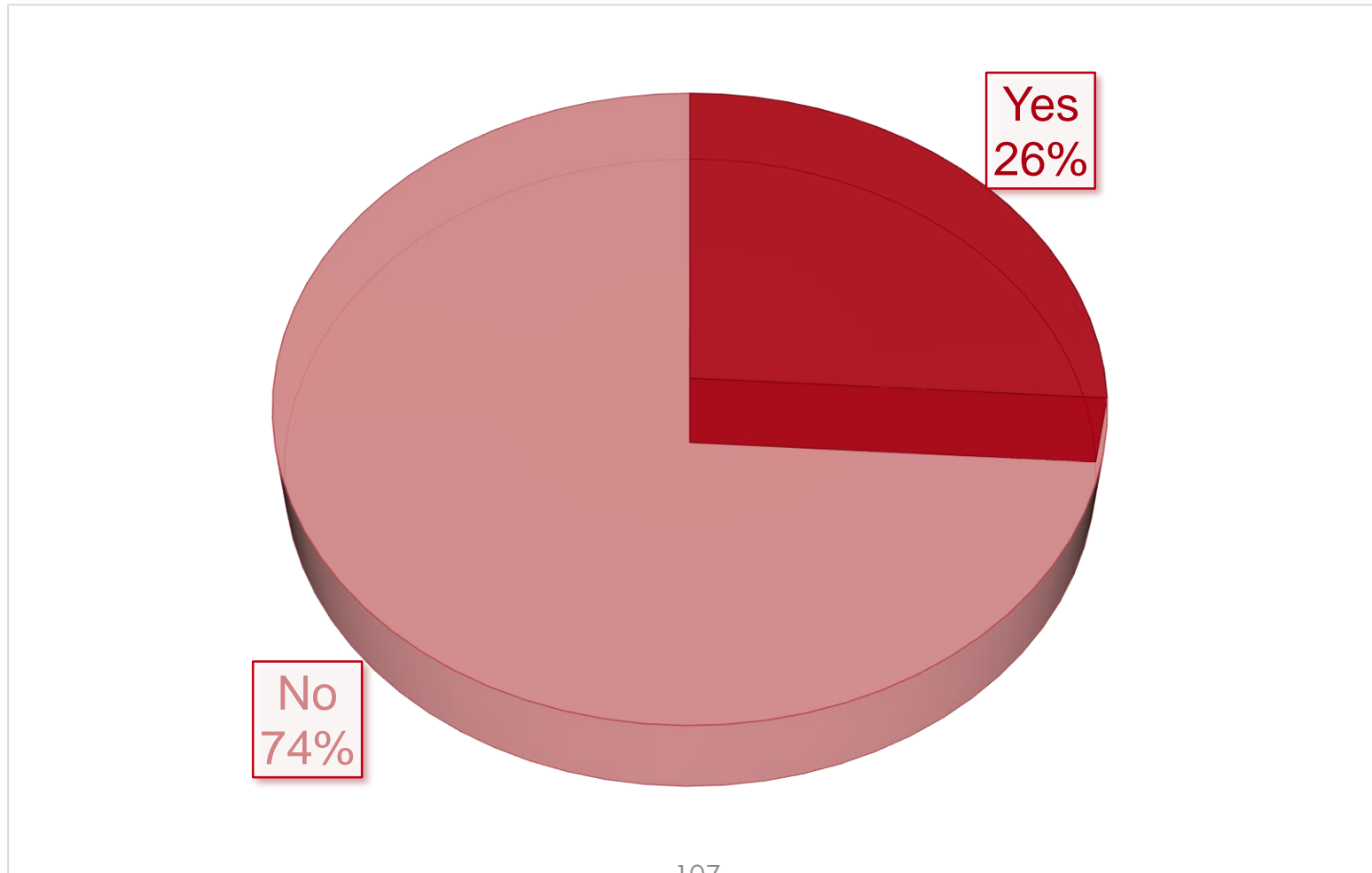
[A]
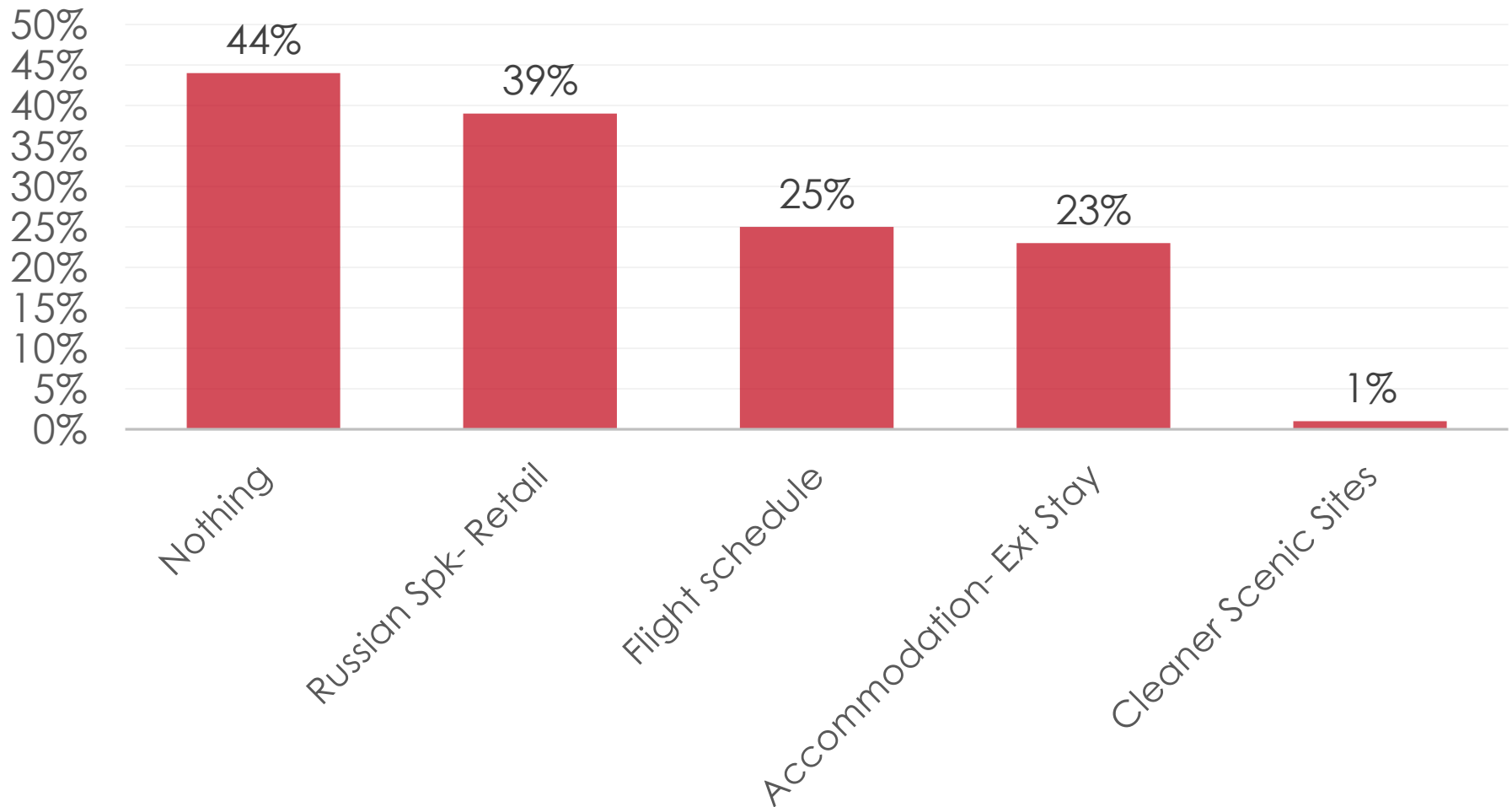
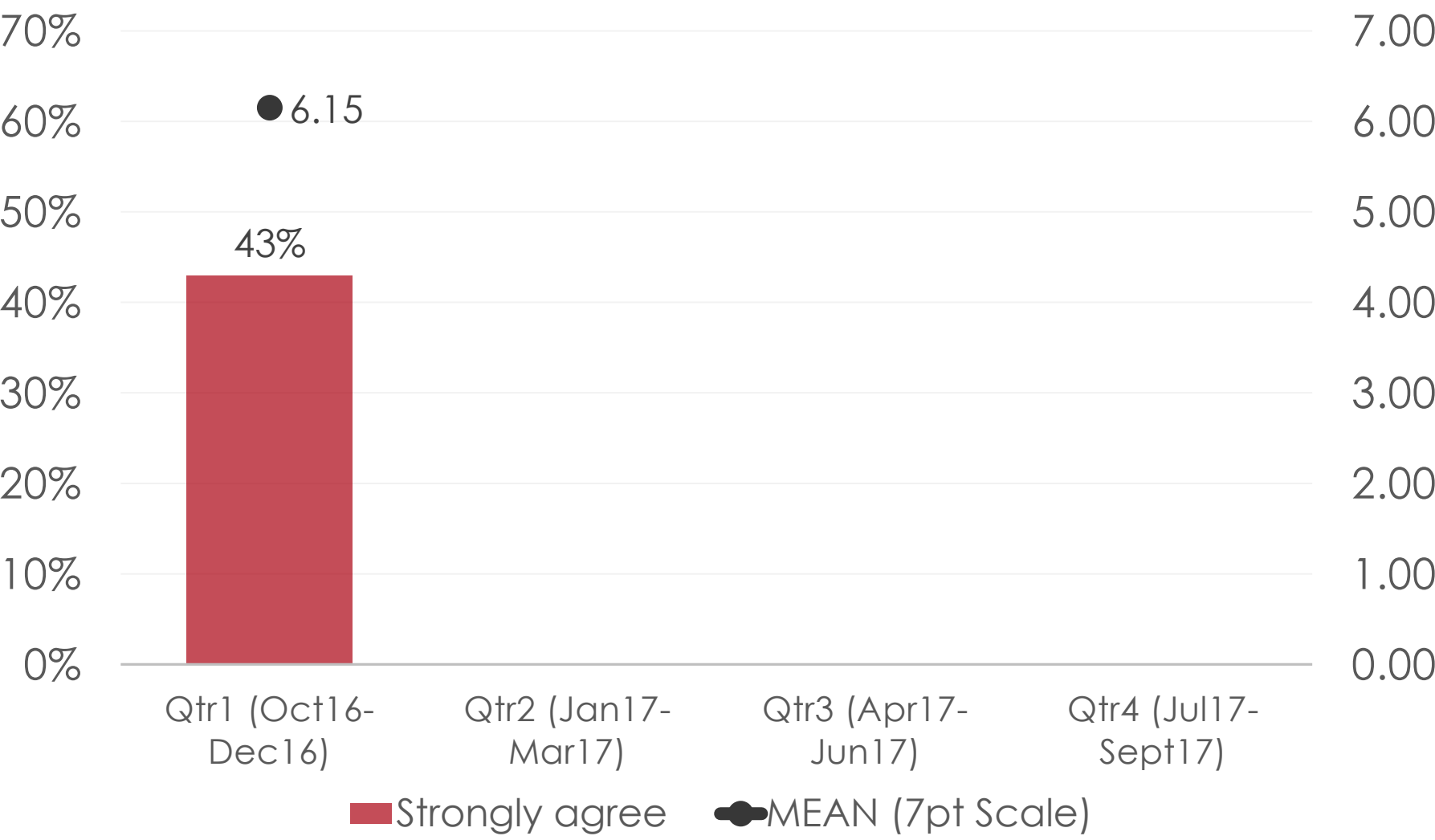# FUTURE TRAVEL CONCERNS
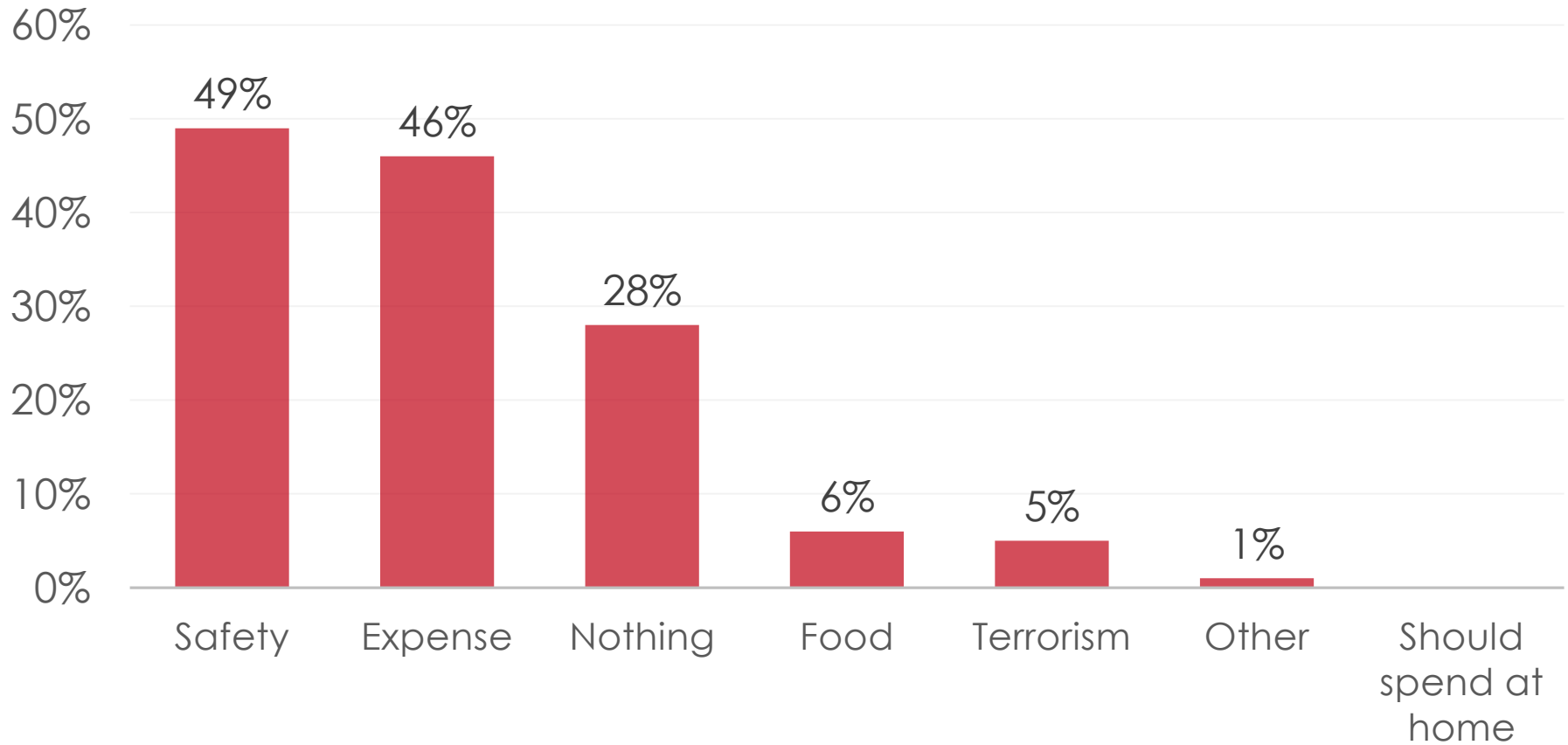
ACTIVITIES/ ATTRACTIONS- APPEAL

Will security screening/ immigration at Guam Airport impact future travel to Guam?
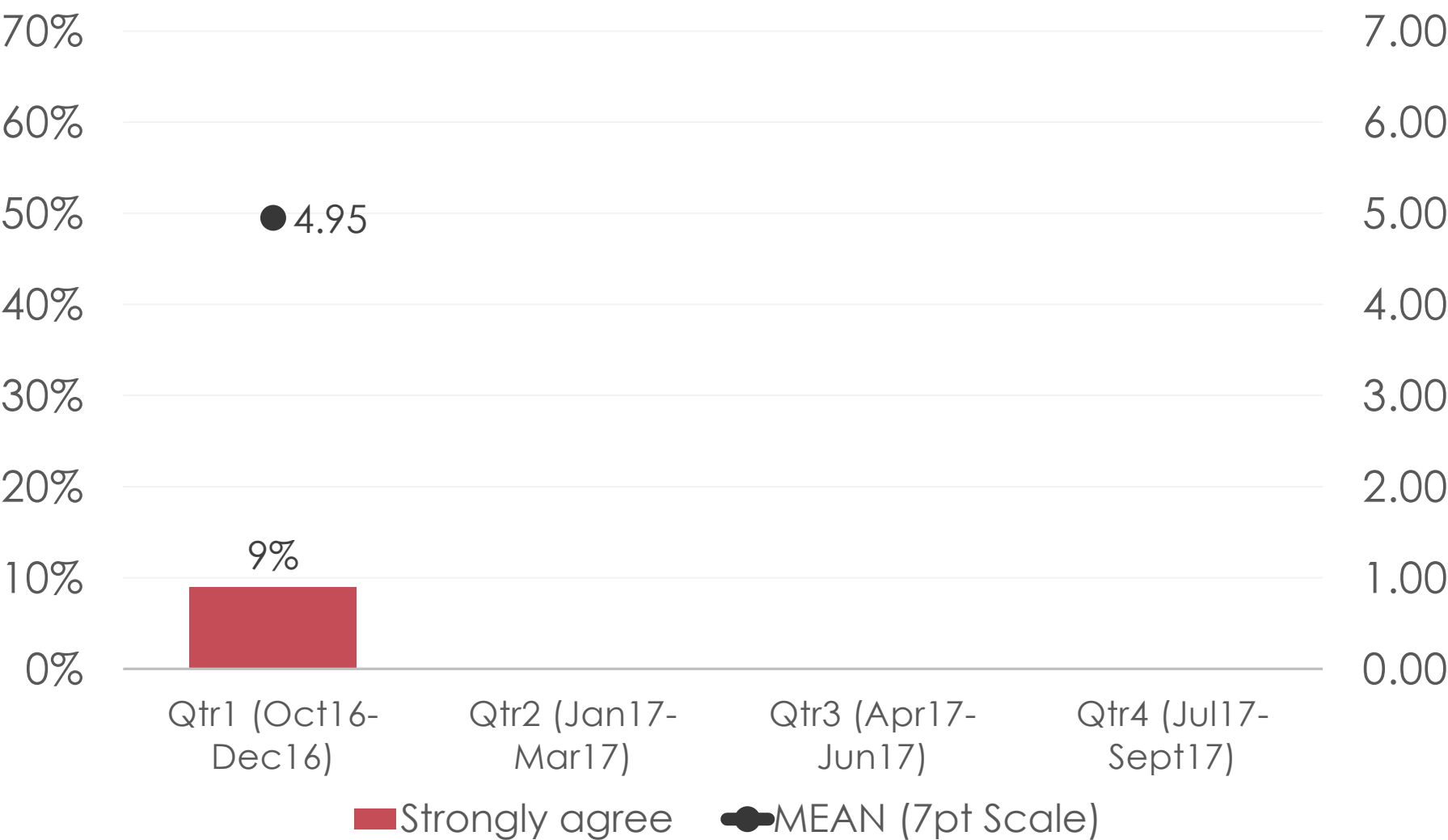

Yes
26%

No
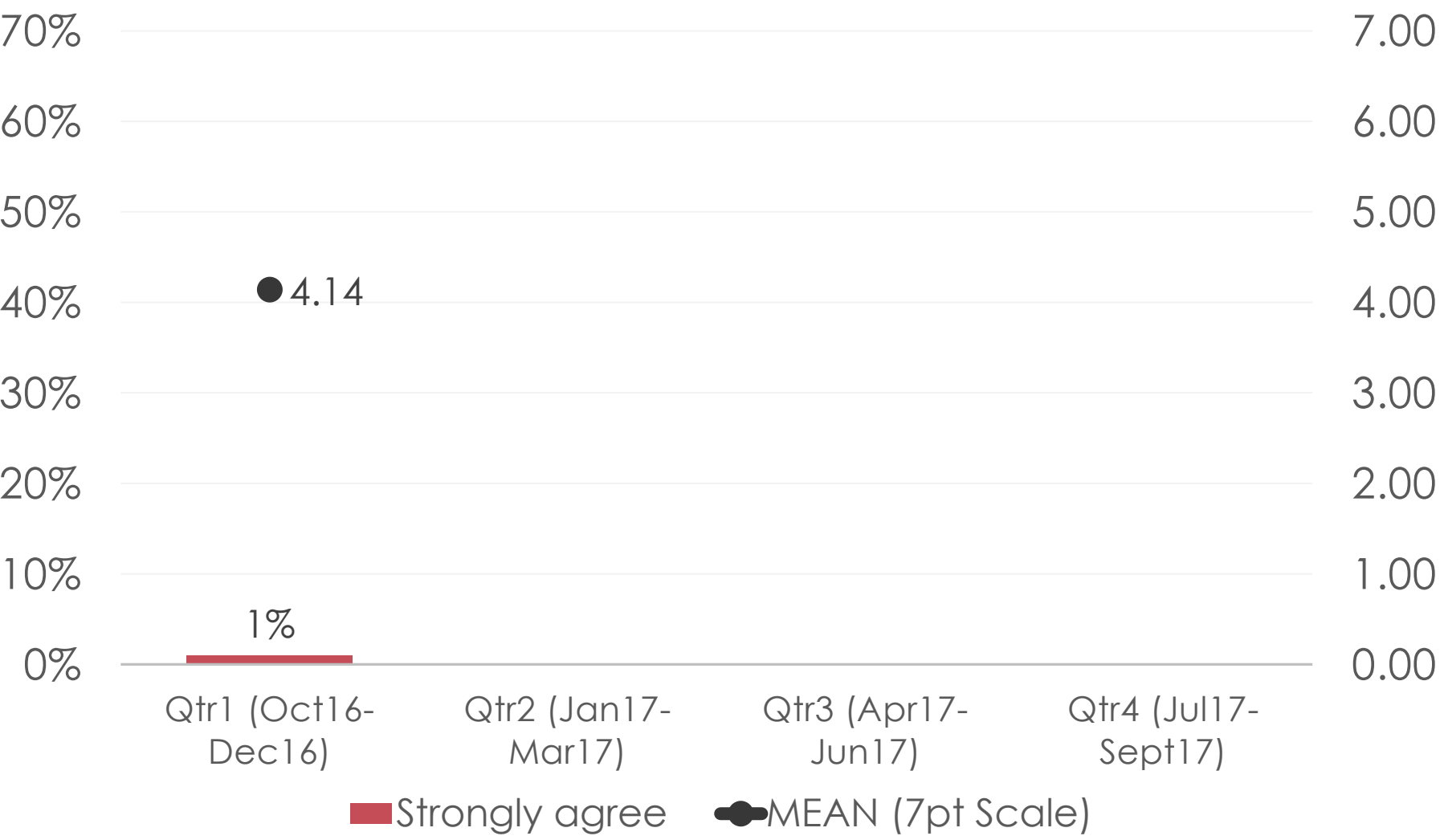74%

[A]

Guam Airport Arrival
Need Russian Speaking Officials
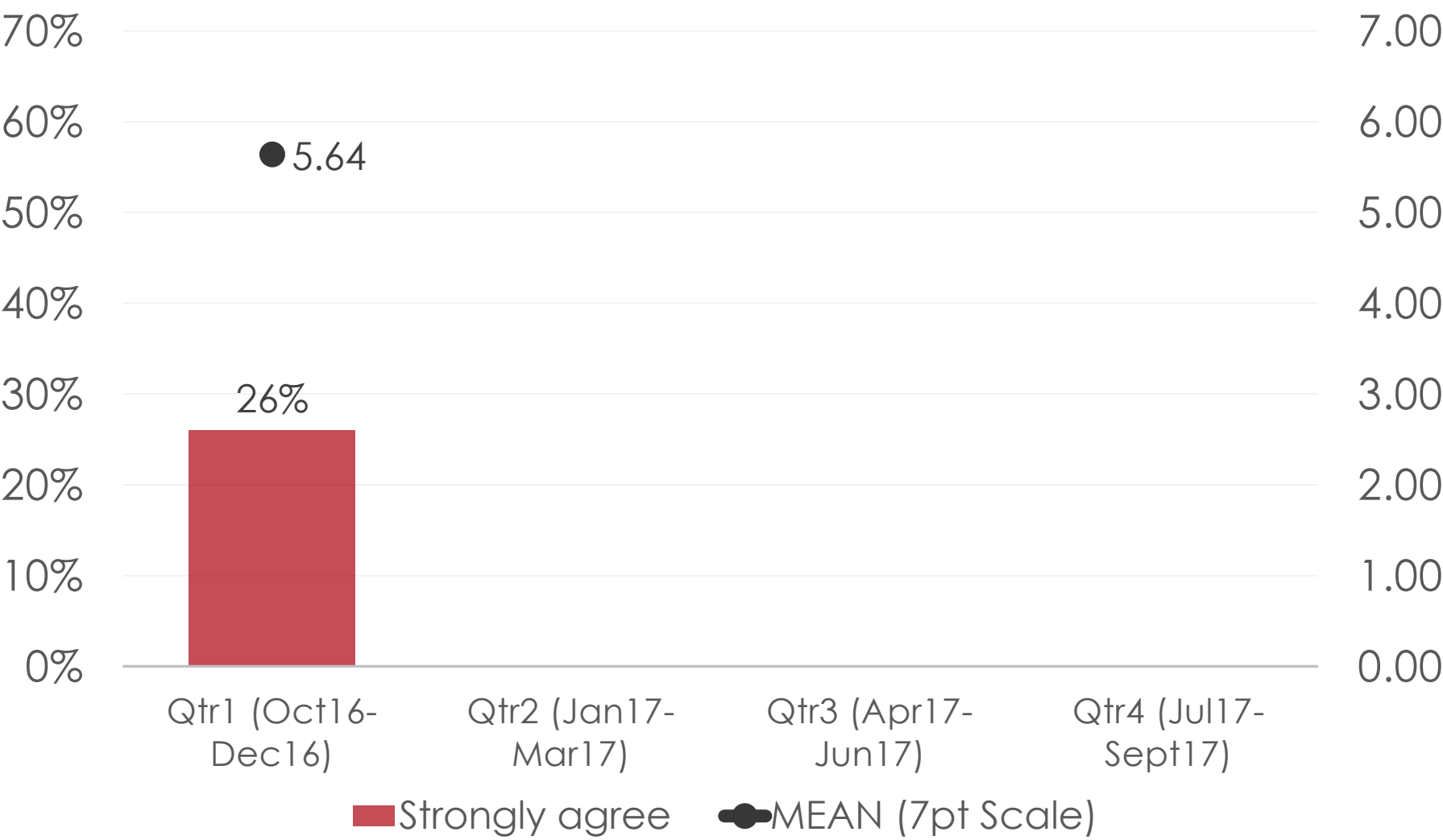
Guam Airport Arrival
Need More Immigration Officers
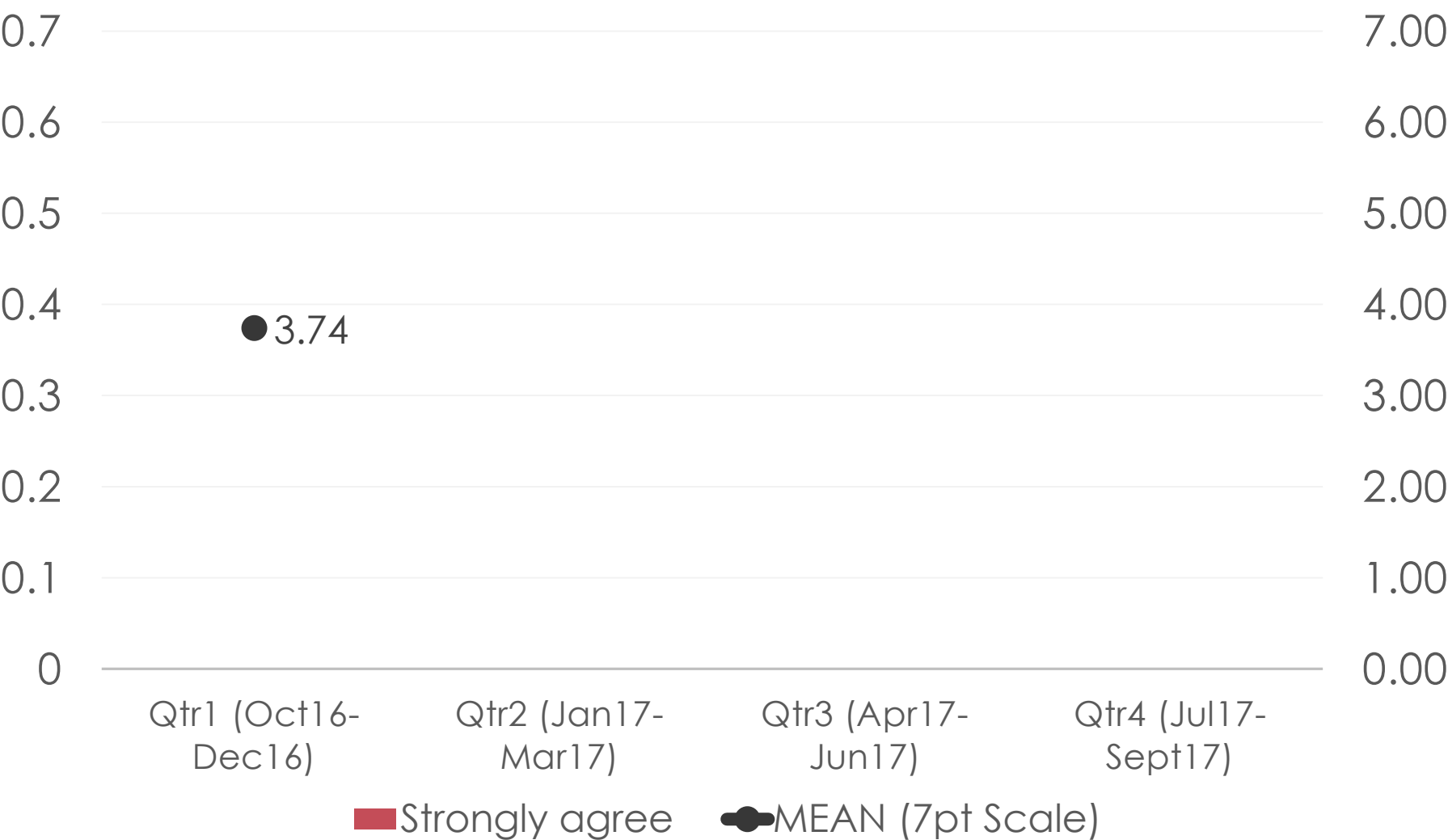
Guam Airport Arrival
Need Friendlier Airport Officials

● 4.14

1%

Qtr1 (Oct16-Dec16) Qtr2 (Jan17-Mar17) Qtr3 (Apr17-Jun17) Qtr4 (Jul17-Sept17)

■ Strongly agree ●— MEAN (7pt Scale)

[A]

Guam Airport Arrival
The Airport Facilities Were Clean/ Appealing

Chart showing "The Airport Facilities Were Clean/ Appealing"

- Qtr1 (Oct16-Dec16): Strongly agree 26%, MEAN ●5.64
- Qtr2 (Jan17-Mar17)
- Qtr3 (Apr17-Jun17)
- Qtr4 (Jul17-Sept17)

Legend: ▪ Strongly agree ●─ MEAN (7pt Scale)

[A]

Guam Airport Arrival
The Airport Facilities Need to be Better Maintained

●3.74

| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |

🟥 Strongly agree   ●━MEAN (7pt Scale)

[A]

SECTION 7
GUAM CULTURE

[A]

EXPERIENCED-CHAMORRO/ HAFA ADAI SPIRIT

Bar chart showing:
- Beaches: 48%
- Chamorro cuisine: 44%
- Did NOT experience: 41%
- Night Market event: 33%
- Live music: 24%
- Socializing w/ locals: 11%
- Other: 0%

[A]
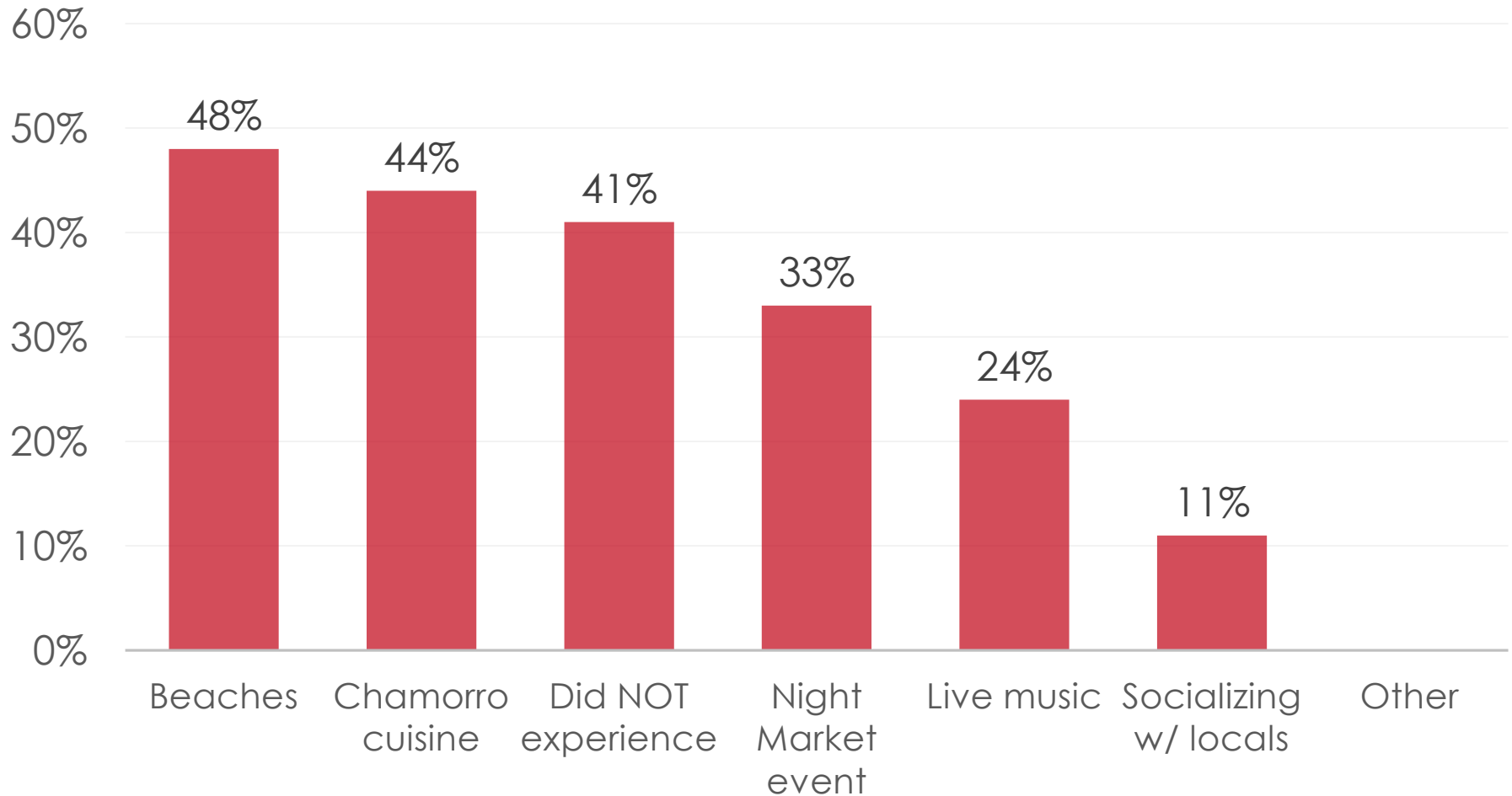
EXPERIENCED-
OTHER CULTURAL ACTIVITY/EVENTS

Bar chart:
- Did NOT experience: 56%
- Chamorro Village: 32%
- Two Lovers Pt: 31%
- Chamorro Cultural Entertainment: 4%
- Gef Pago Park: 1%
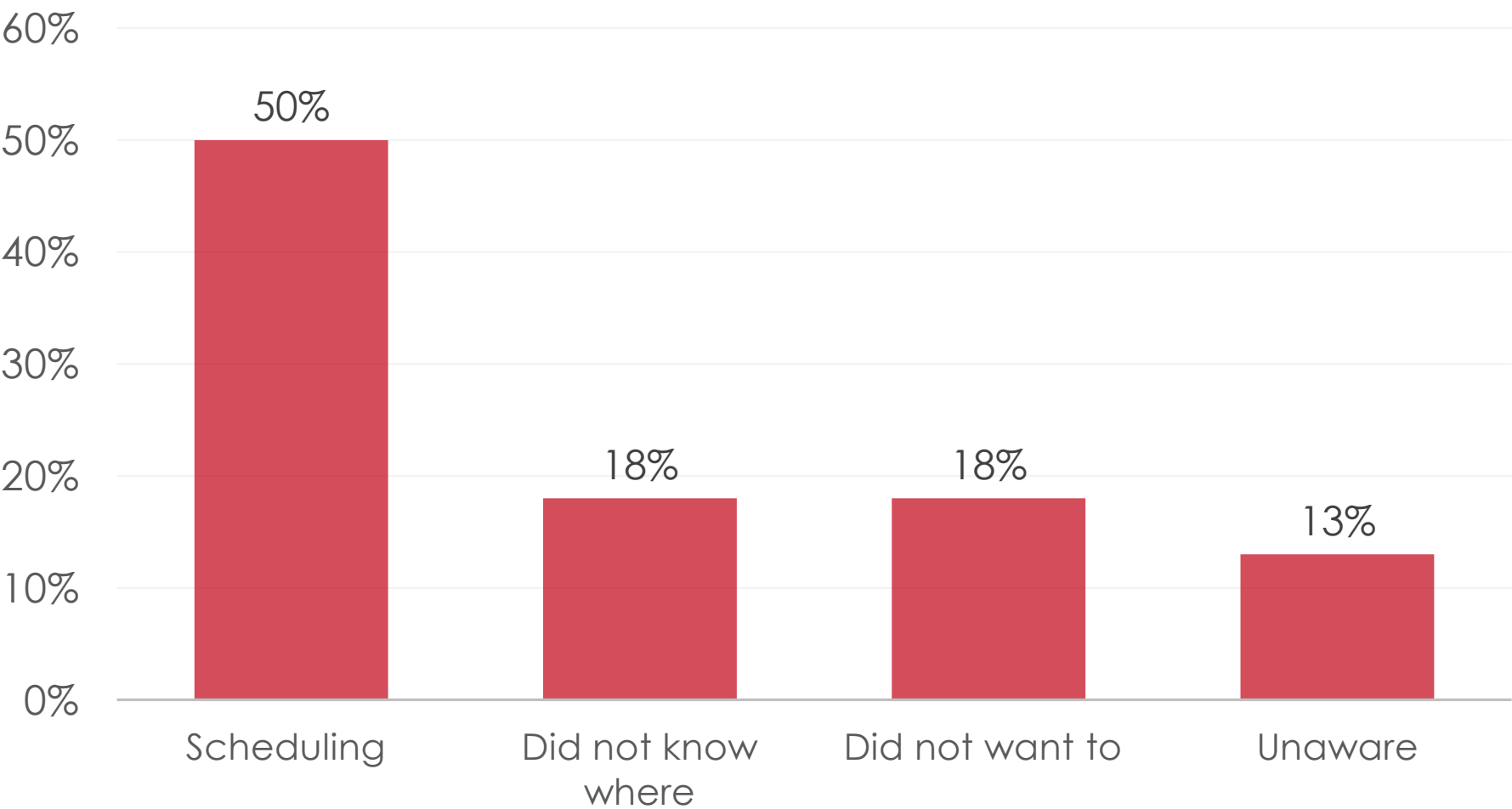
[A]
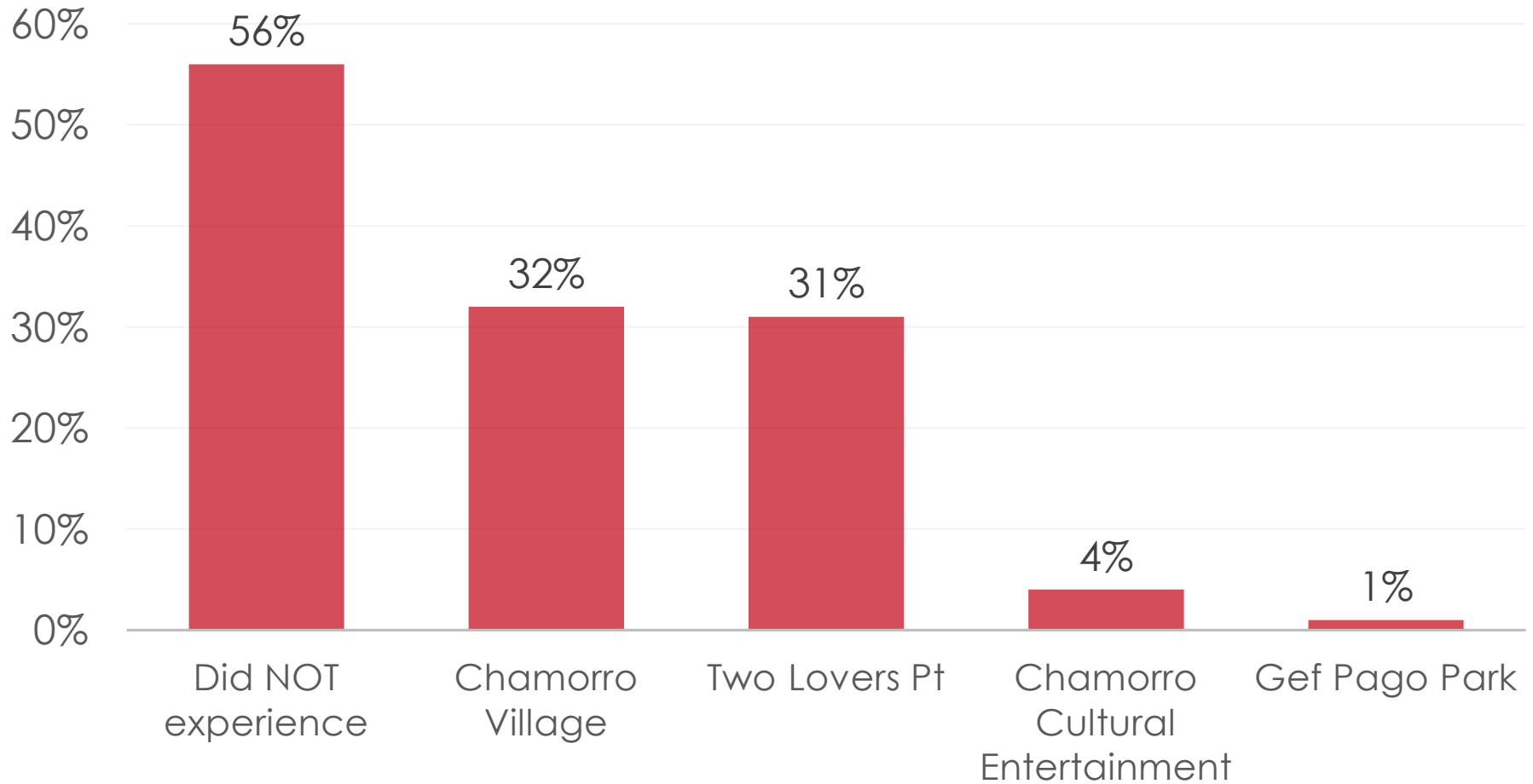
SOURCES OF INFORMATION-CULTURAL ACTIVITY/EVENTS

SATISFACTION- CULTURAL ACTIVITY/EVENTS
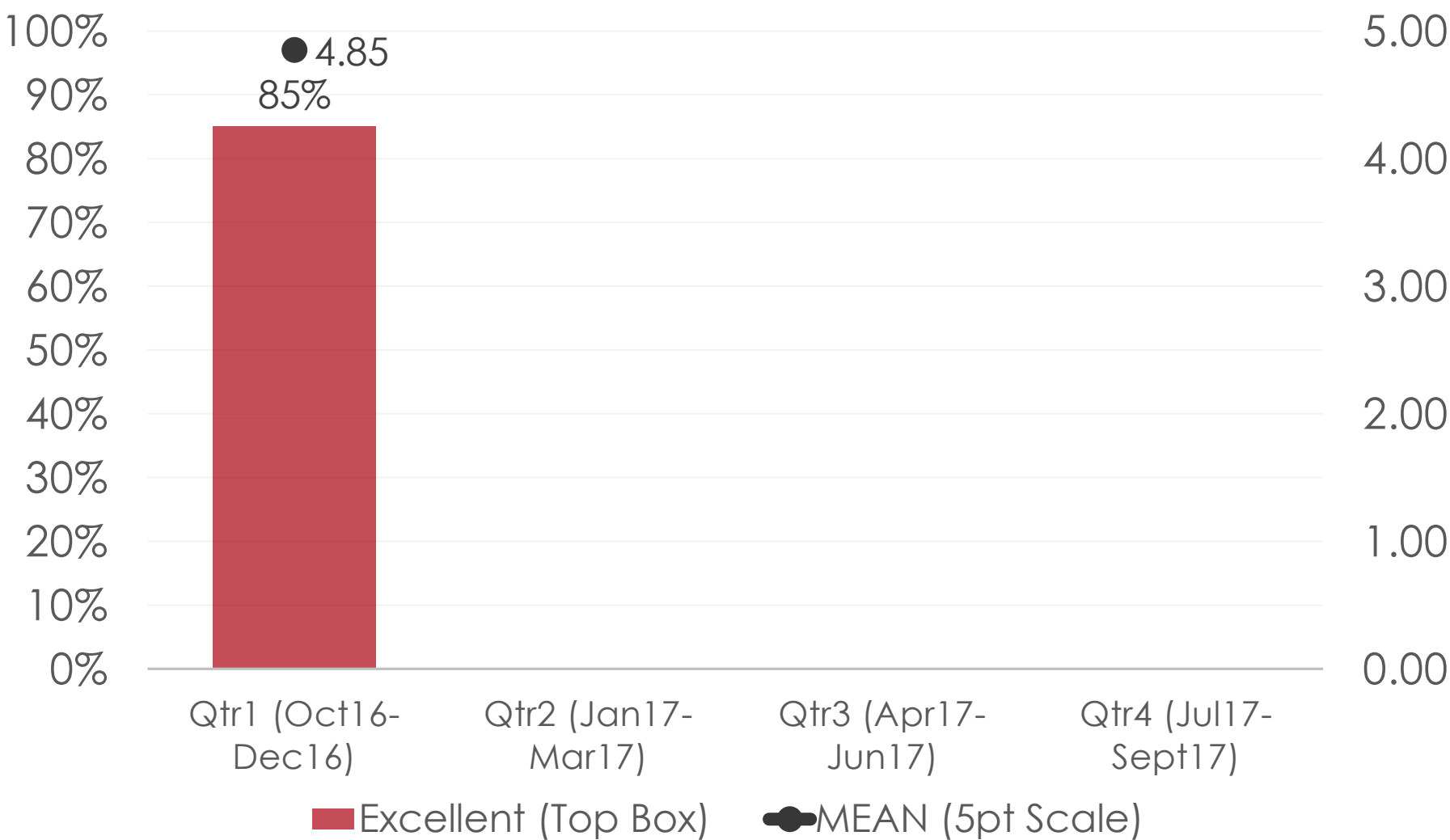
OBSTACLES- CULTURAL ACTIVITY/EVENTS

[A]

ADVANCED STATISTICS

Analysis Technique

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)

- Independent variables are satisfaction with different aspects of trip to Guam (numeric).

- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.

- This determines the significant (p=<.05)drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

[A]

Drivers- Overall Satisfaction

Drivers of Overall Satisfaction, 1st Qtr. 2017	
Drivers:	**rank**
Quality & Cleanliness of beaches & parks	
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	
Variety of shopping	
Price of things on Guam	**1**
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	**2**
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	**3**
% of Overall Satisfaction Accounted For	**75.9%**
NOTE: Only significant drivers are included.	

[A]

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Russian visitor's experience on Guam is driven by three significant factors in the 1st Quarter 2017 Period. By rank order they are:
  - **Price of things on Guam,**
  - **Quality of landscape in Tumon, and**
  - **Quality/cleanliness of transportation vehicles.**

- With all three factors the overall r^2 is .759 meaning that **75.9% of overall satisfaction is accounted for by these factors.**

[A]

Drivers – On-Isle Expenditures

Drivers of Per Person On Island Expenditures, 1st Qtr. 2017	
Drivers:	**rank**
Quality & Cleanliness of beaches & parks	
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	**0.0%**
NOTE: Only significant drivers are included.	

[A]

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Russian visitors on Guam is driven by no significant factors in the 1st Quarter 2017 period.

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