

Guam Visitors Bureau

Russian Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

QTR.2 (JANUARY - MARCH 2017)

Prepared by: Anthology Research

Information contained herein is the property of the Guam Visitors Bureau. The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.



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 **63** 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 **63** is +/- 12.35 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 +/- 12.35 percentage points.

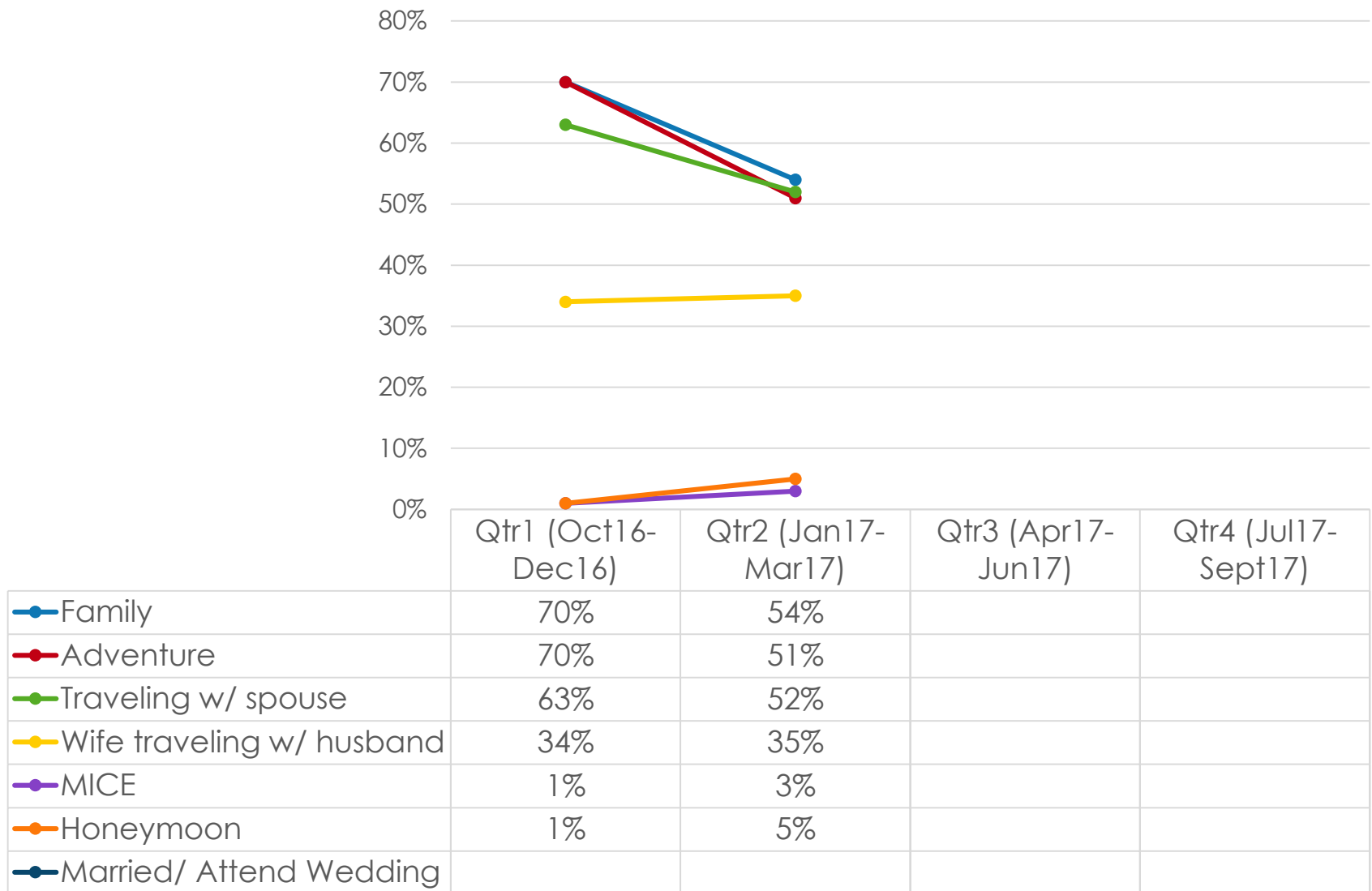
Objectives

- 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.

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

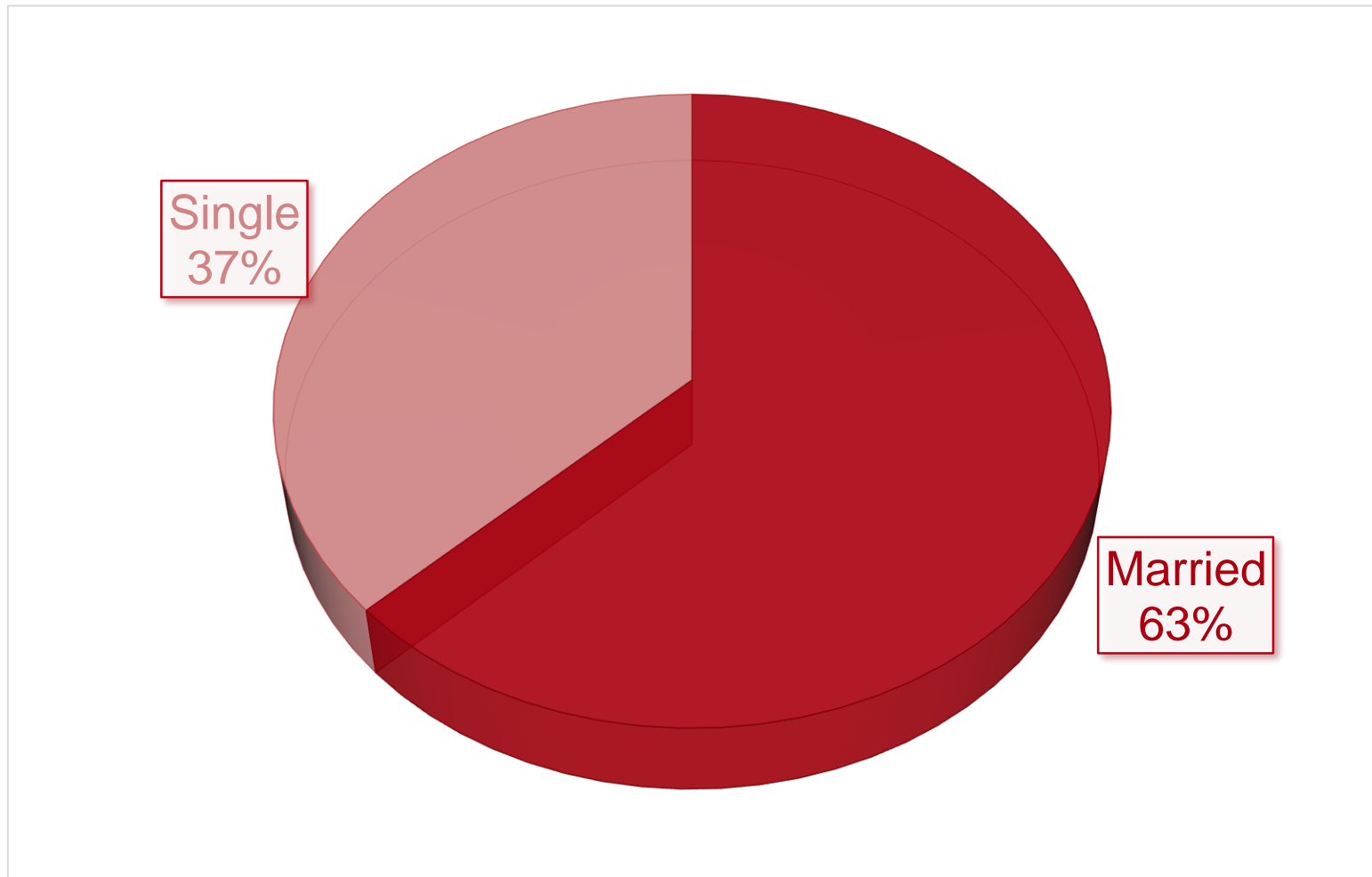
Key Highlighted Segments



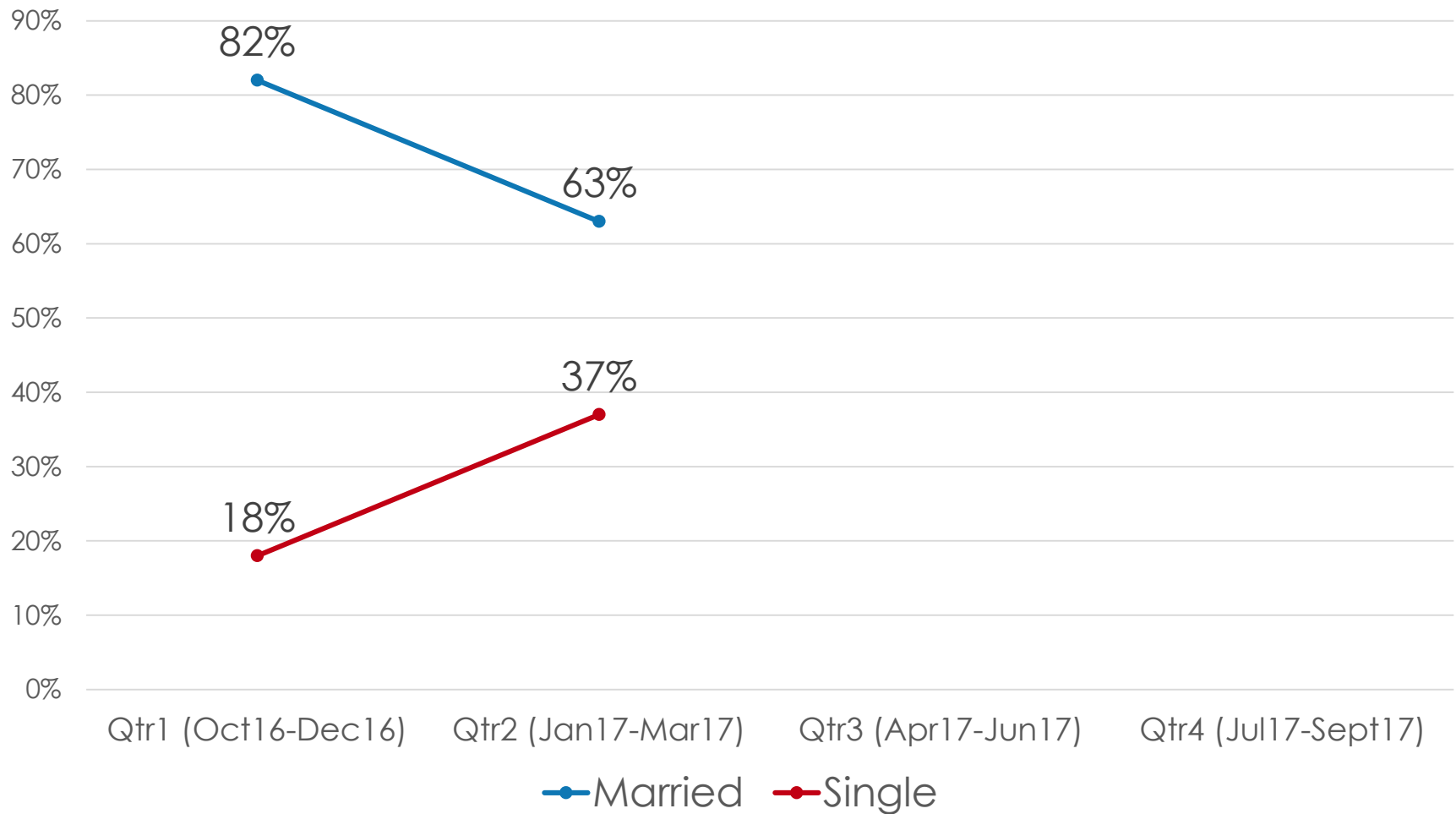
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2017 Tracking



Marital status – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

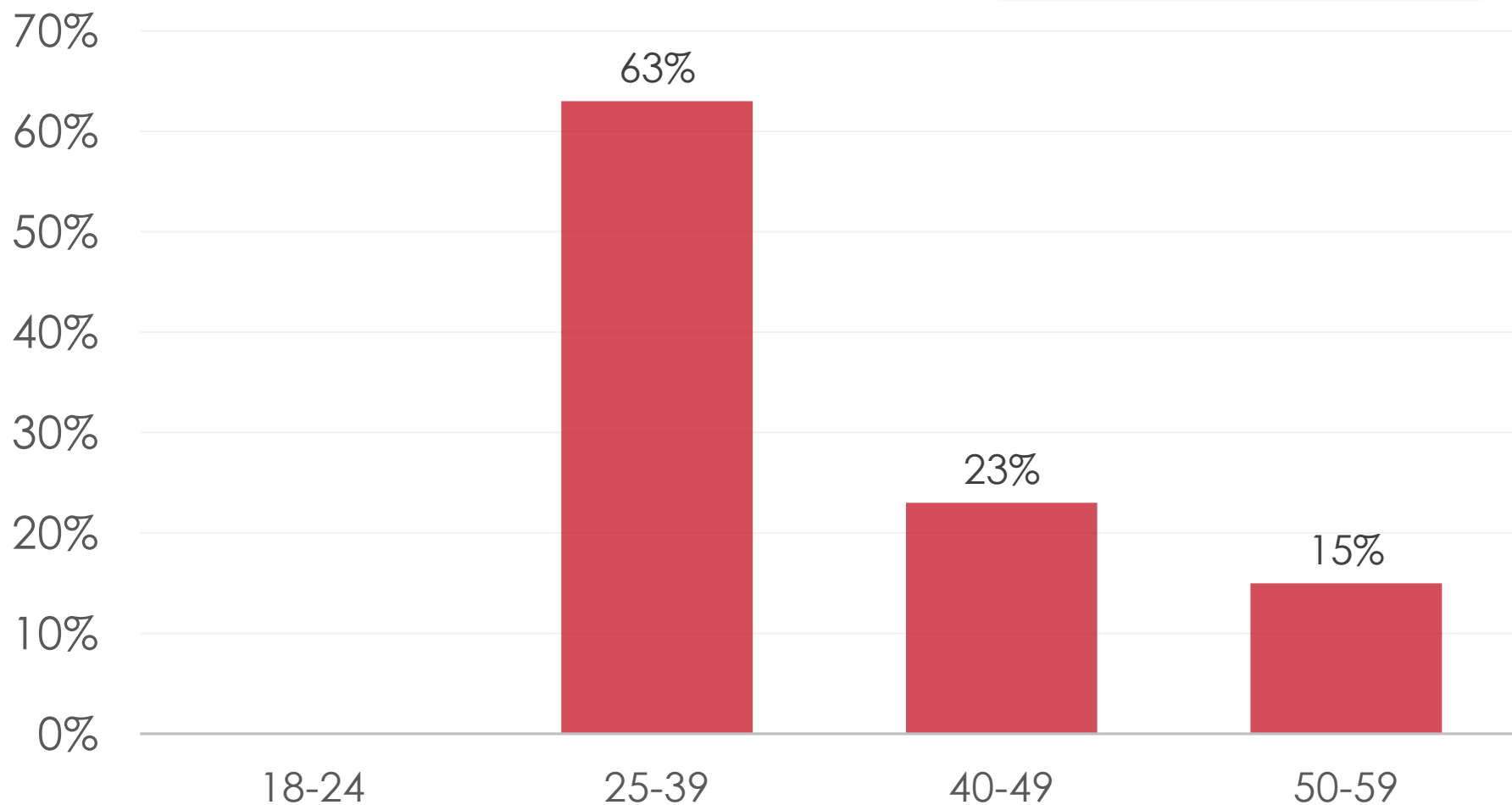
QE Are you married or single?

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
QE	Married	63%	97%	95%	97%	100%	100%	71%
	Single	37%	3%	5%	3%			29%
	Total	62	33	21	32	2	3	31

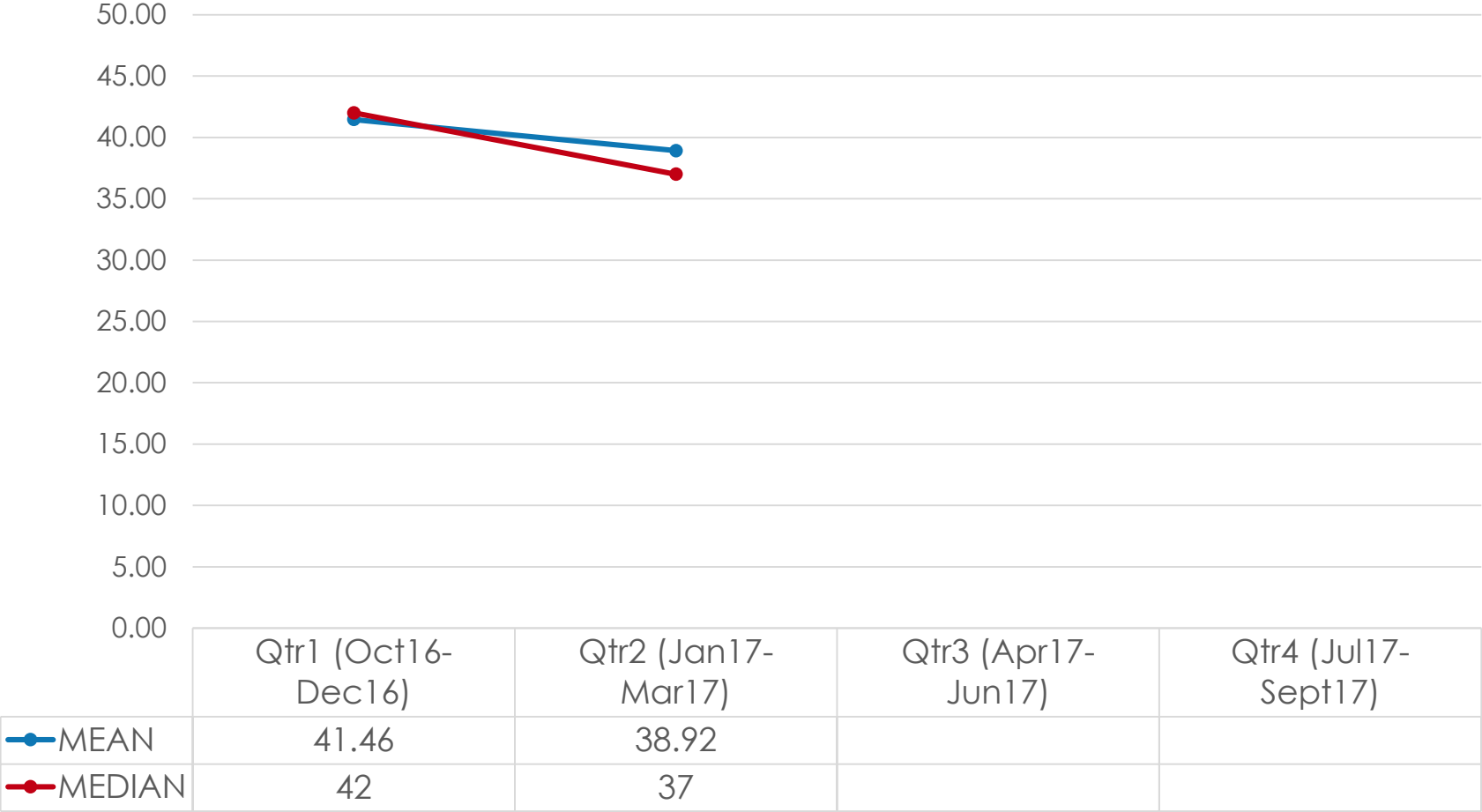
Prepared by QMark Research

Age

MEAN = 38.92
MEDIAN = 37



Age – FY2017 Tracking



Age – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

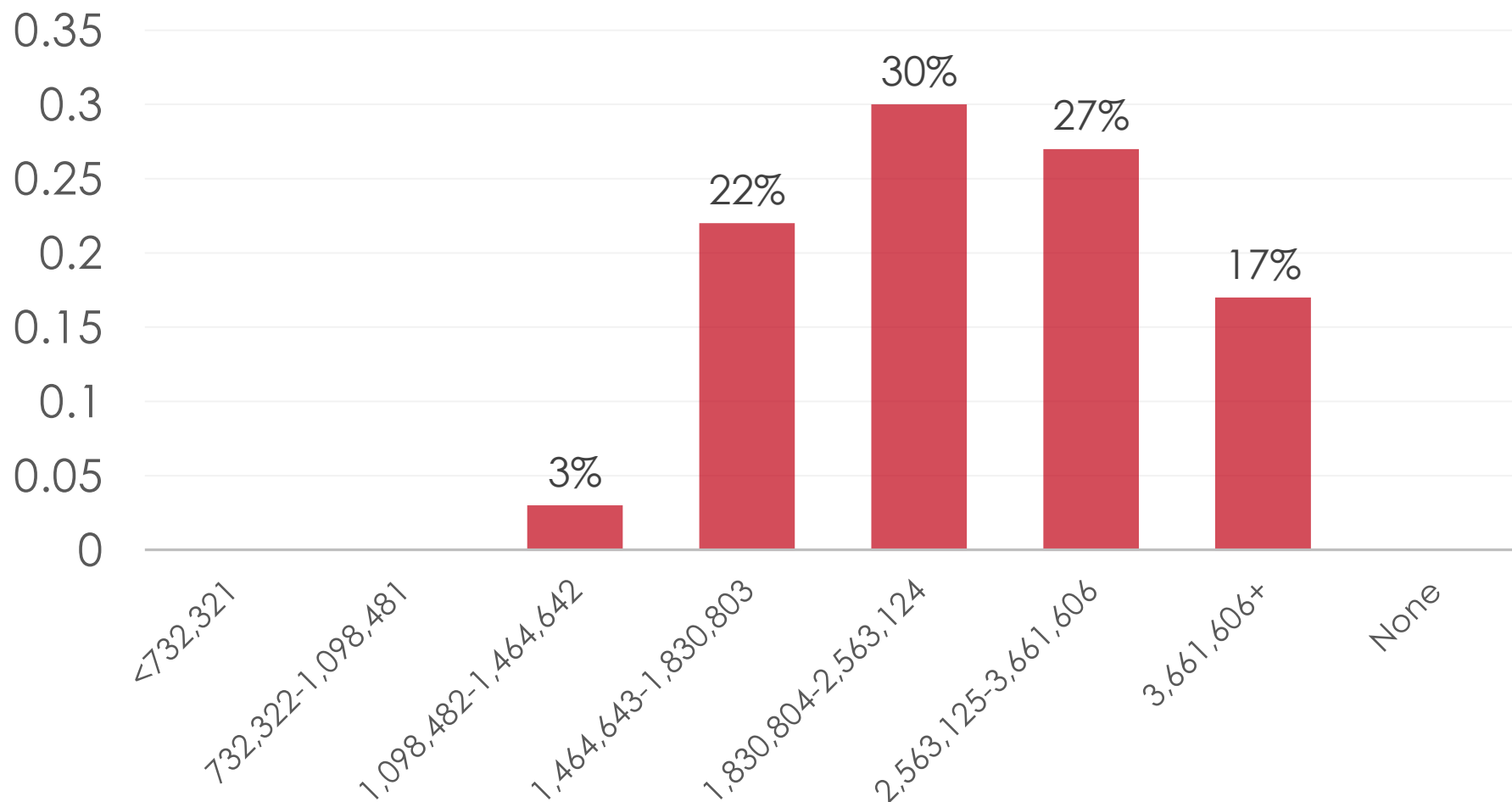
QF And what was your age on your last birthday?

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
QF	25-39	63%	41%	55%	42%	100%	67%	59%
	40-49	23%	32%	18%	30%		33%	16%
	50-59	15%	26%	27%	27%			25%
	Total	62	34	22	33	2	3	32
QF	Mean	38.92	43.06	42.05	43.36	37.00	38.00	40.44
	Median	37	41	39	41	37	37	38

Prepared by QMark Research

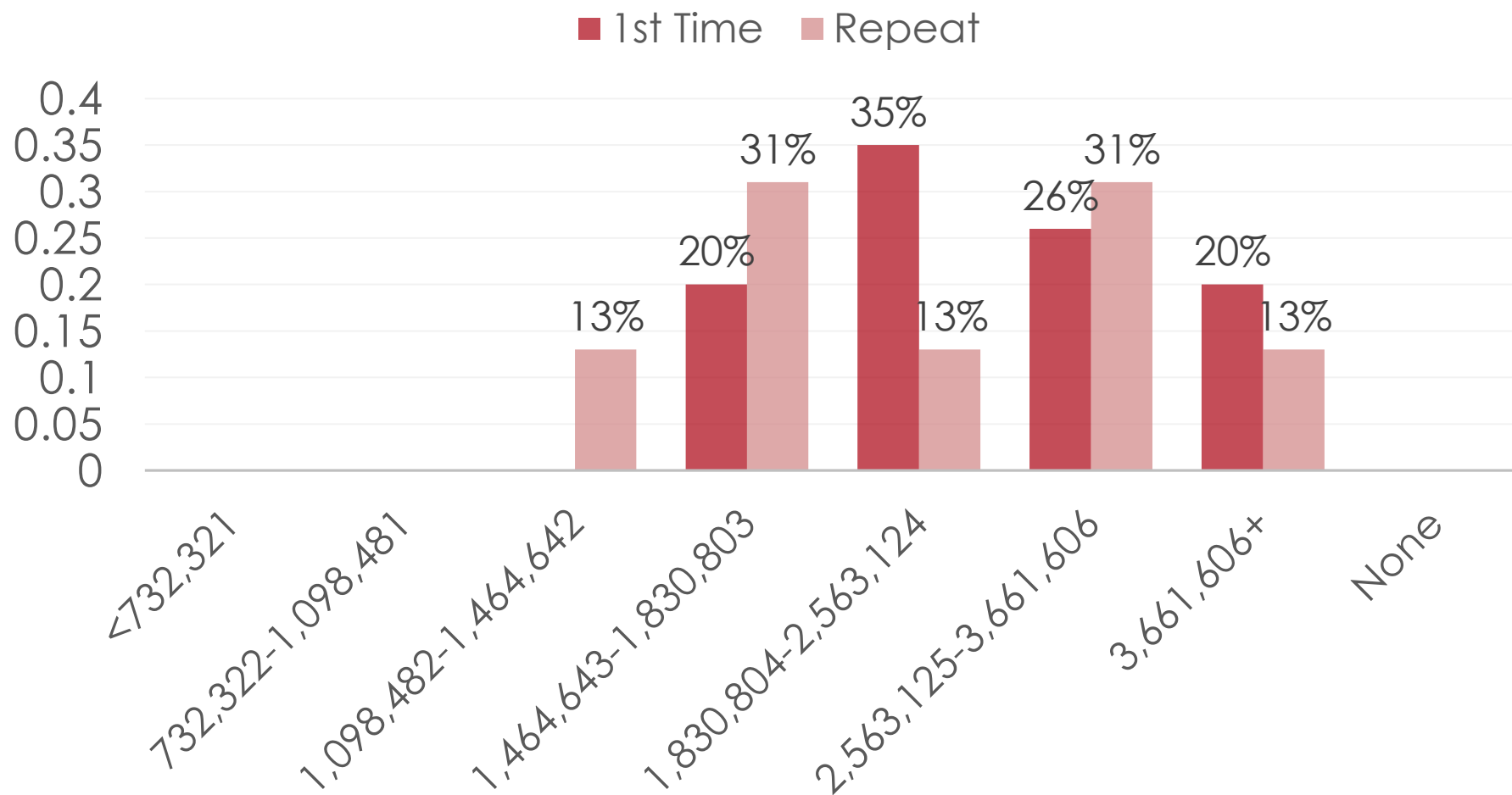
Annual Household Income

EXCHANGE RATE RUBLES 58.65=\$1



Annual Household Income

EXCHANGE RATE RUBLES 58.65=\$1



Annual Household Income – Key Segments

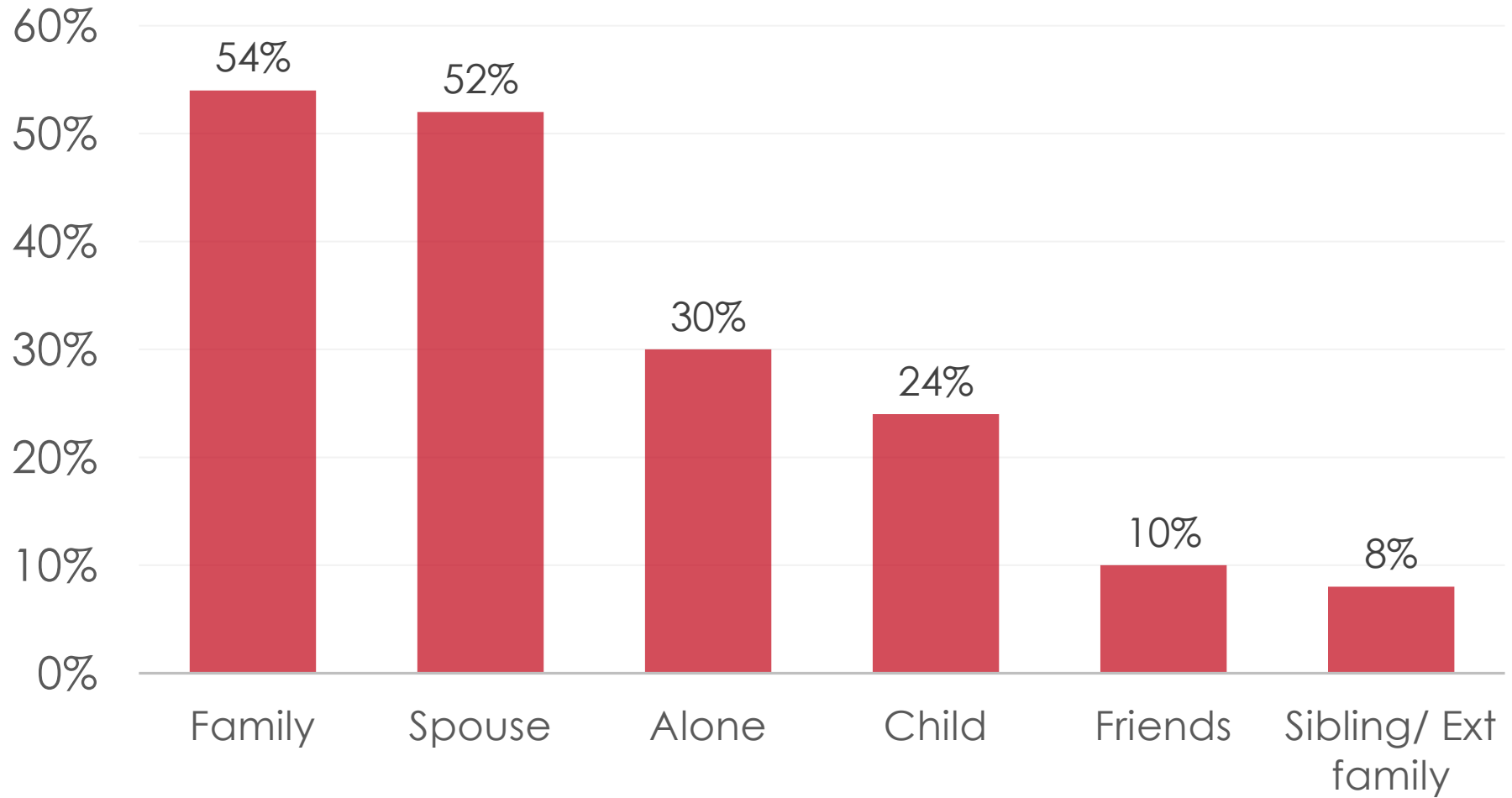
GUAM VISITORS BUREAU - EXIT SURVEY

Q27 What is your approximate annual household income before taxes?

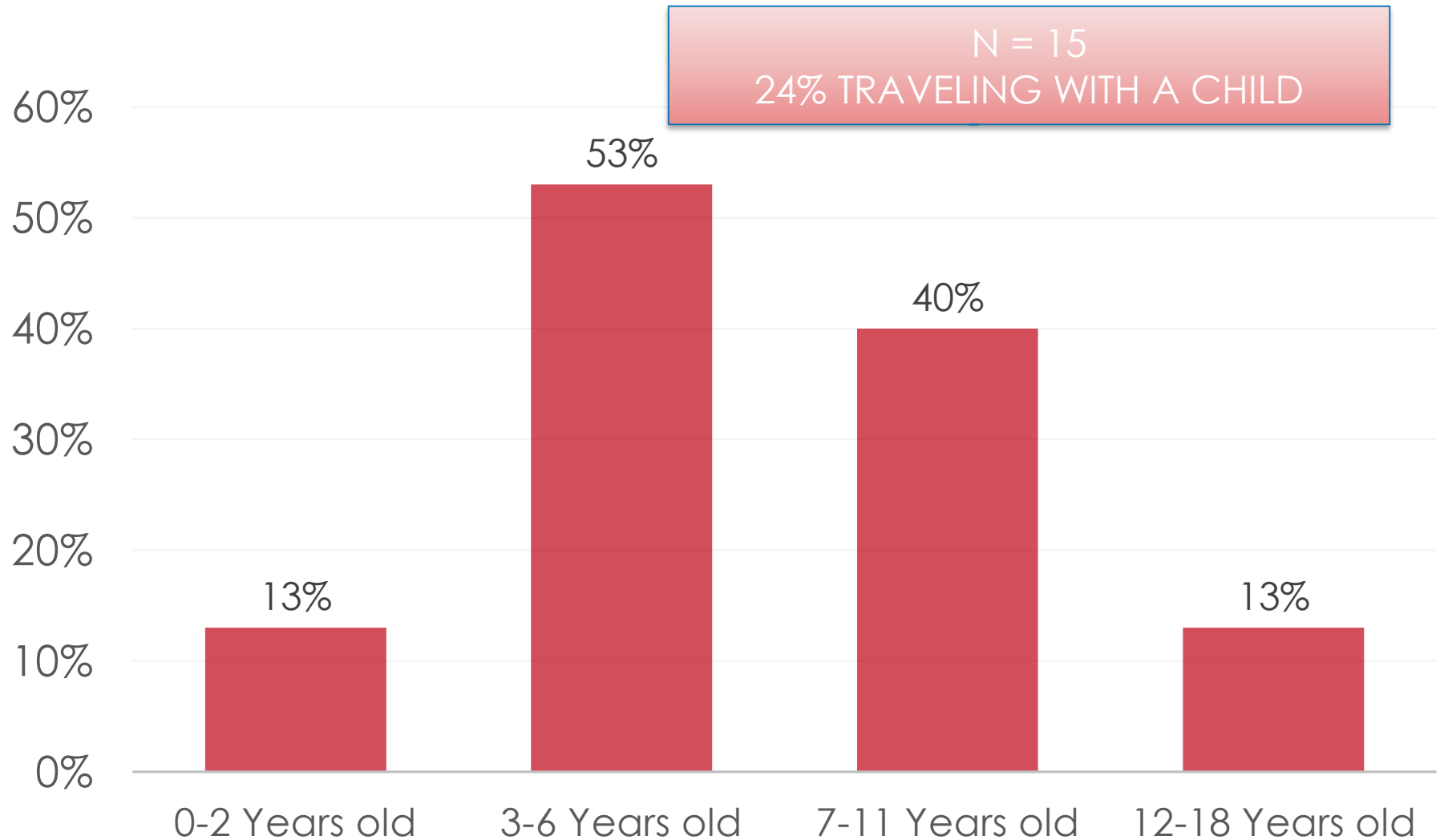
		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
Q27	1,098,482-1,464,642	3%						
	1,464,643-1,830,803	22%	9%	9%	6%	50%		19%
	1,830,803-2,263,124	30%	21%	18%	24%	50%	33%	34%
	2,563,125-3,661,606	27%	41%	50%	42%		33%	28%
	3,661,607+	17%	29%	23%	27%		33%	19%
	Total	63	34	22	33	2	3	32

Prepared by QMark Research

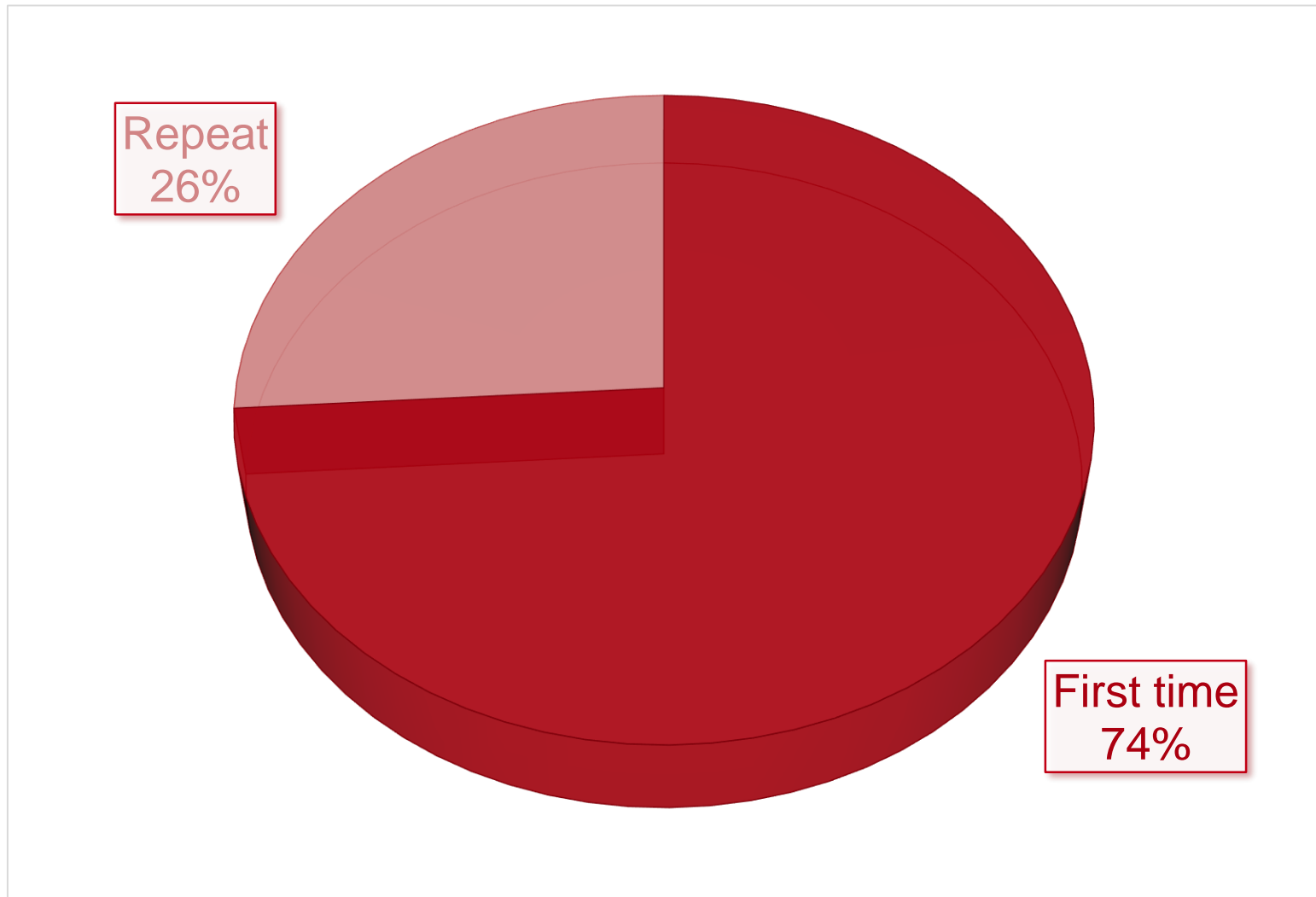
Travel Party



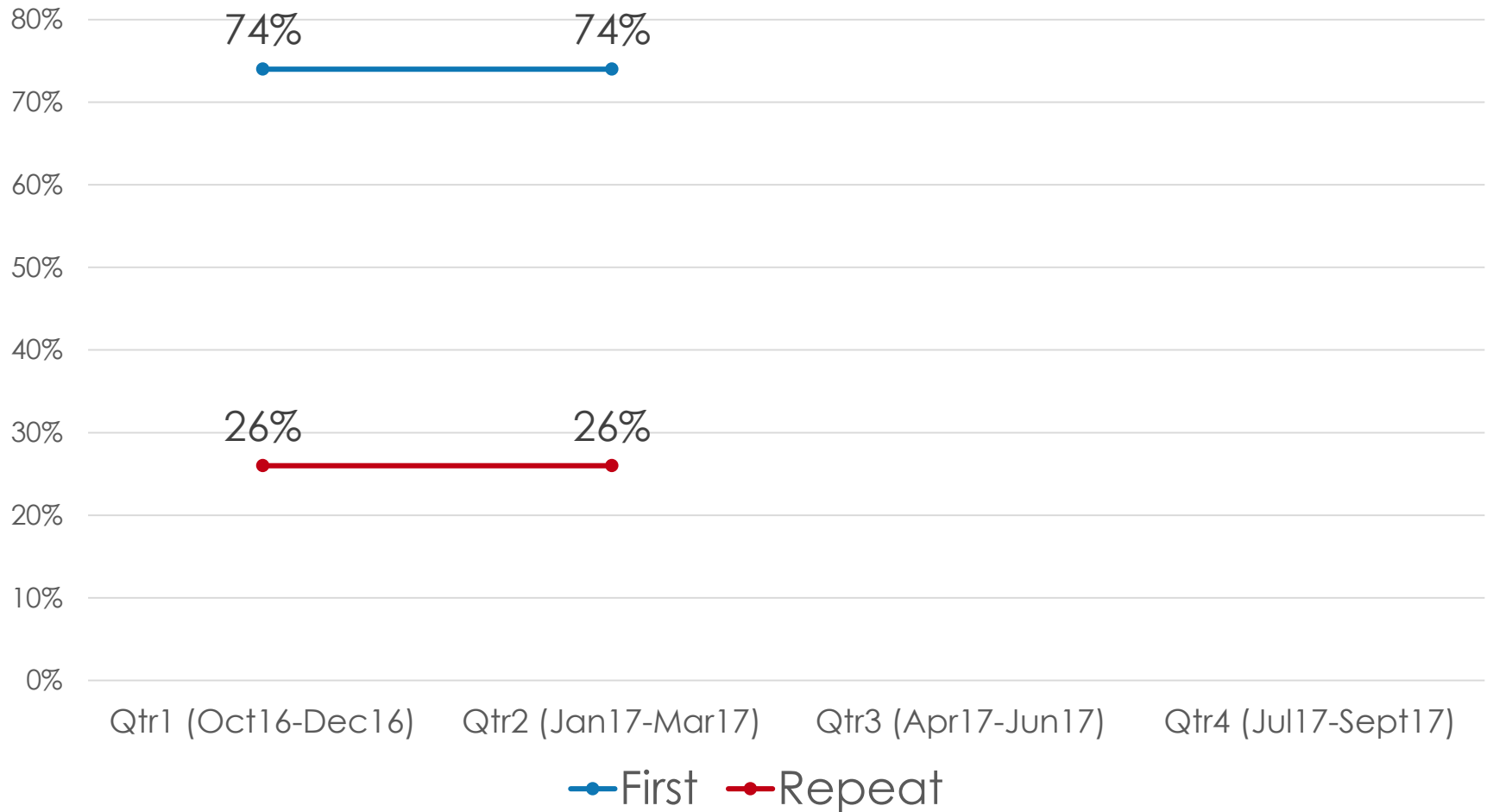
Travel Party - Children



Trips to Guam



Trips to Guam – FY2017 Tracking



Trips to Guam – Key Segments

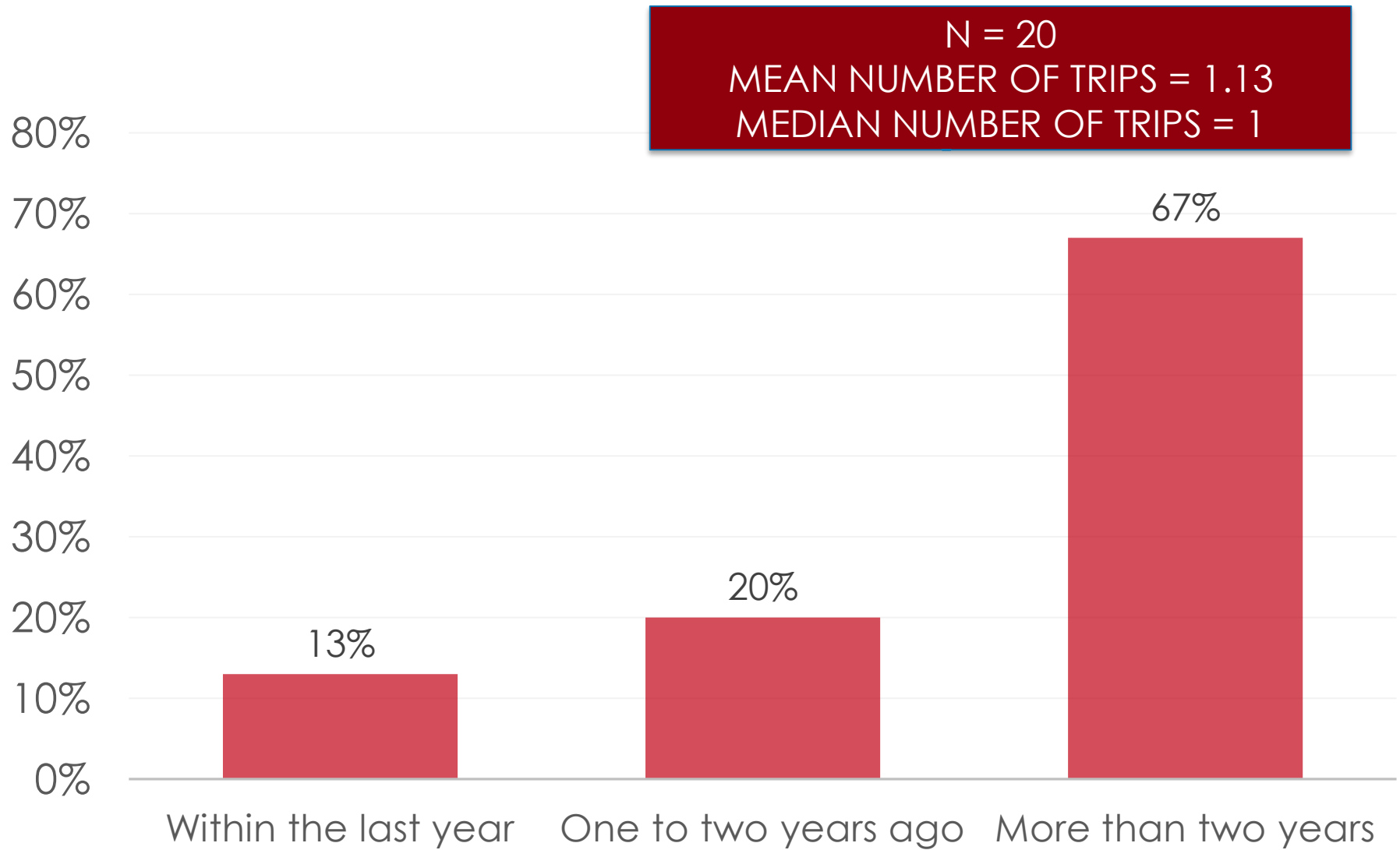
GUAM VISITORS BUREAU - EXIT SURVEY

Q3A Is this your first trip to Guam?

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
Q3A	Yes	74%	85%	86%	88%		100%	84%
	No	26%	15%	14%	13%	100%		16%
	Total	62	33	21	32	2	3	31

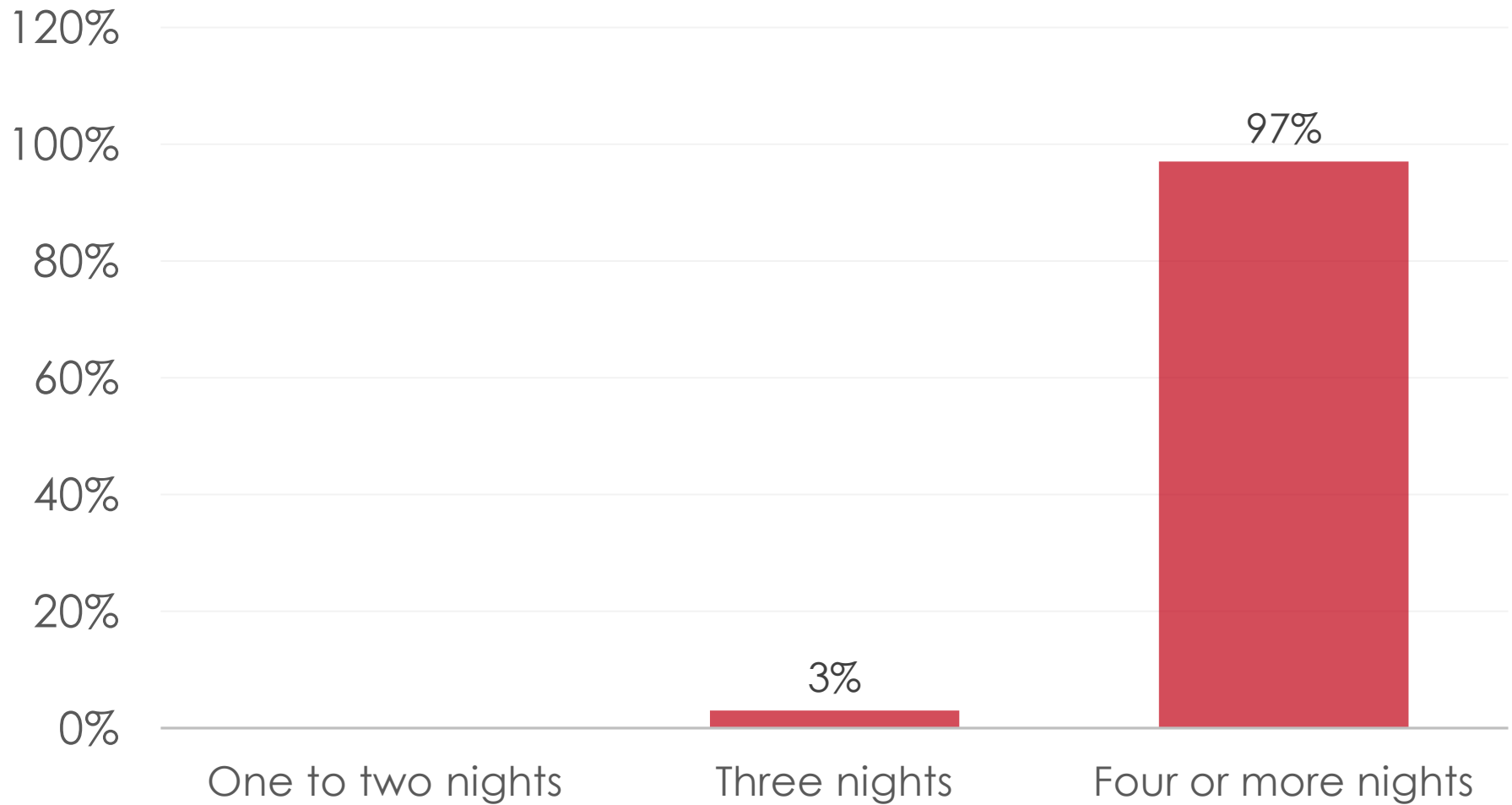
Prepared by QMark Research

Repeat Visitor- Most Recent Trip

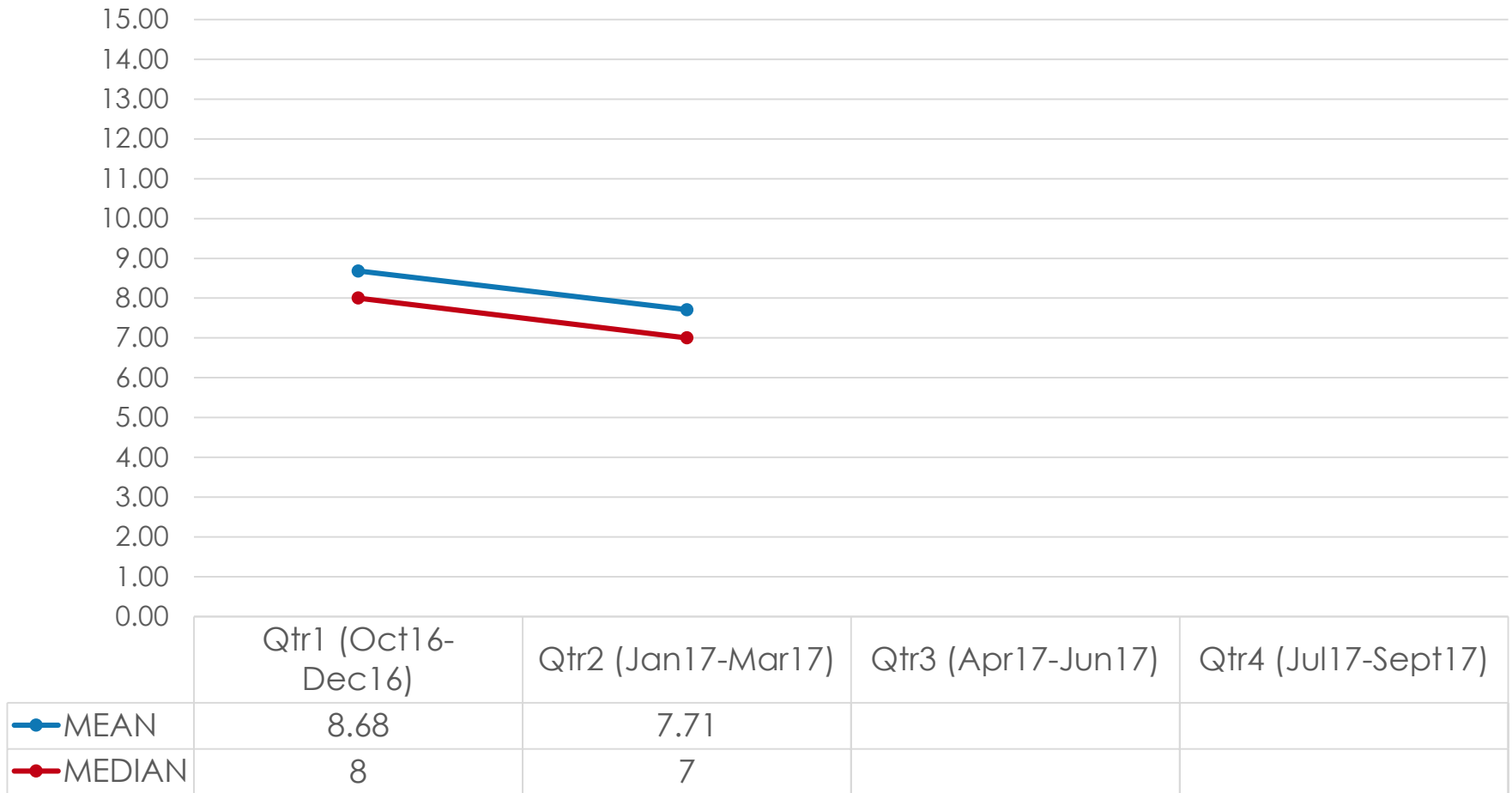


Length of Stay

MEAN NUMBER OF NIGHTS = 7.71
MEDIAN NUMBER OF NIGHTS = 7



Length of Stay – FY2017 Tracking



Length of Stay – Key Segments

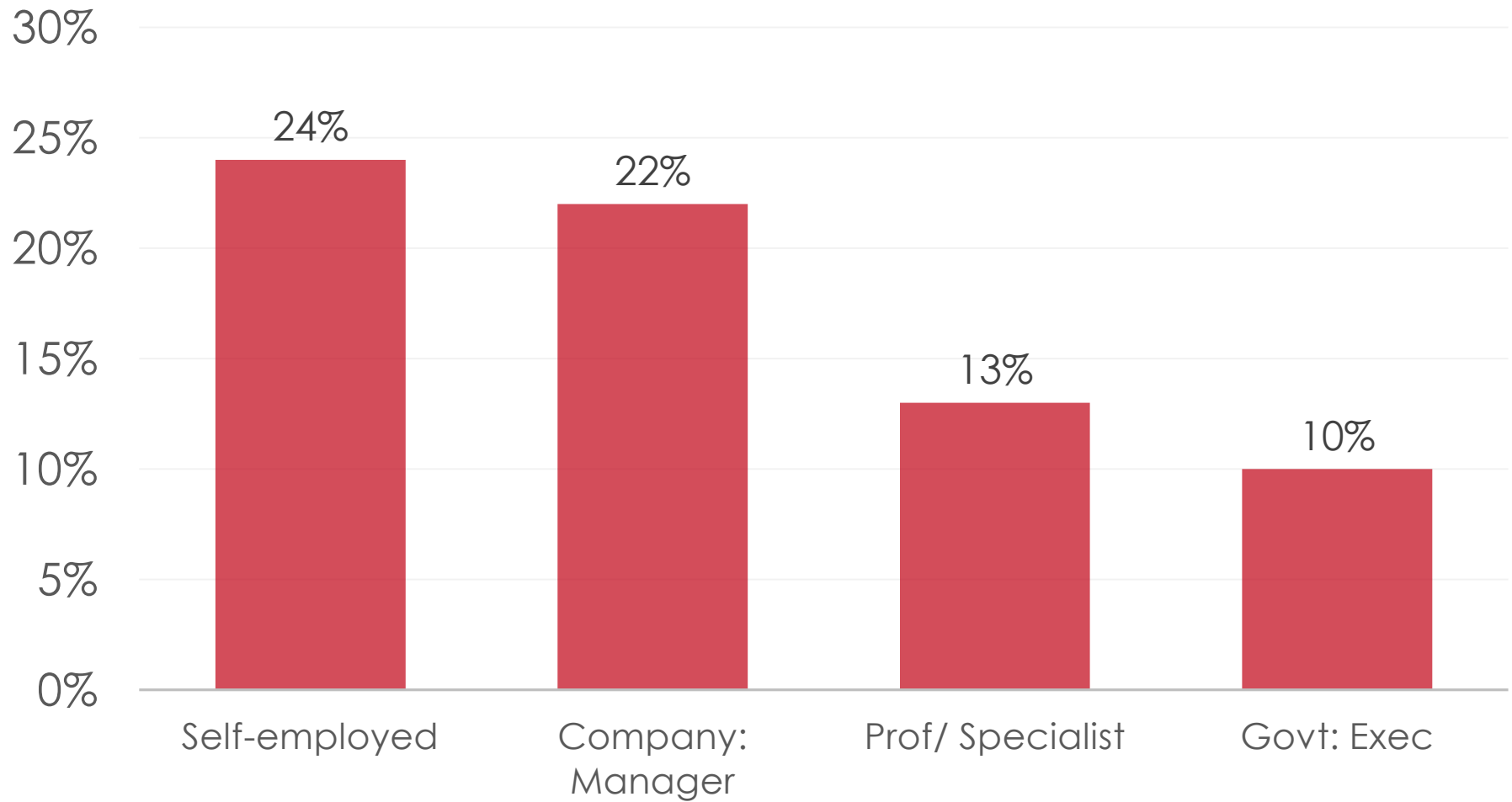
GUAM VISITORS BUREAU - EXIT SURVEY

Q8 How many nights did you stay on Guam?

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
Q8	3	3%	6%	5%	3%			6%
	4+	97%	94%	95%	97%	100%	100%	94%
	Total	63	34	22	33	2	3	32
Q8	Mean	7.71	7.97	8.05	8.09	5.00	8.00	7.72
	Median	7	8	8	8	5	7	8

Prepared by QMark Research

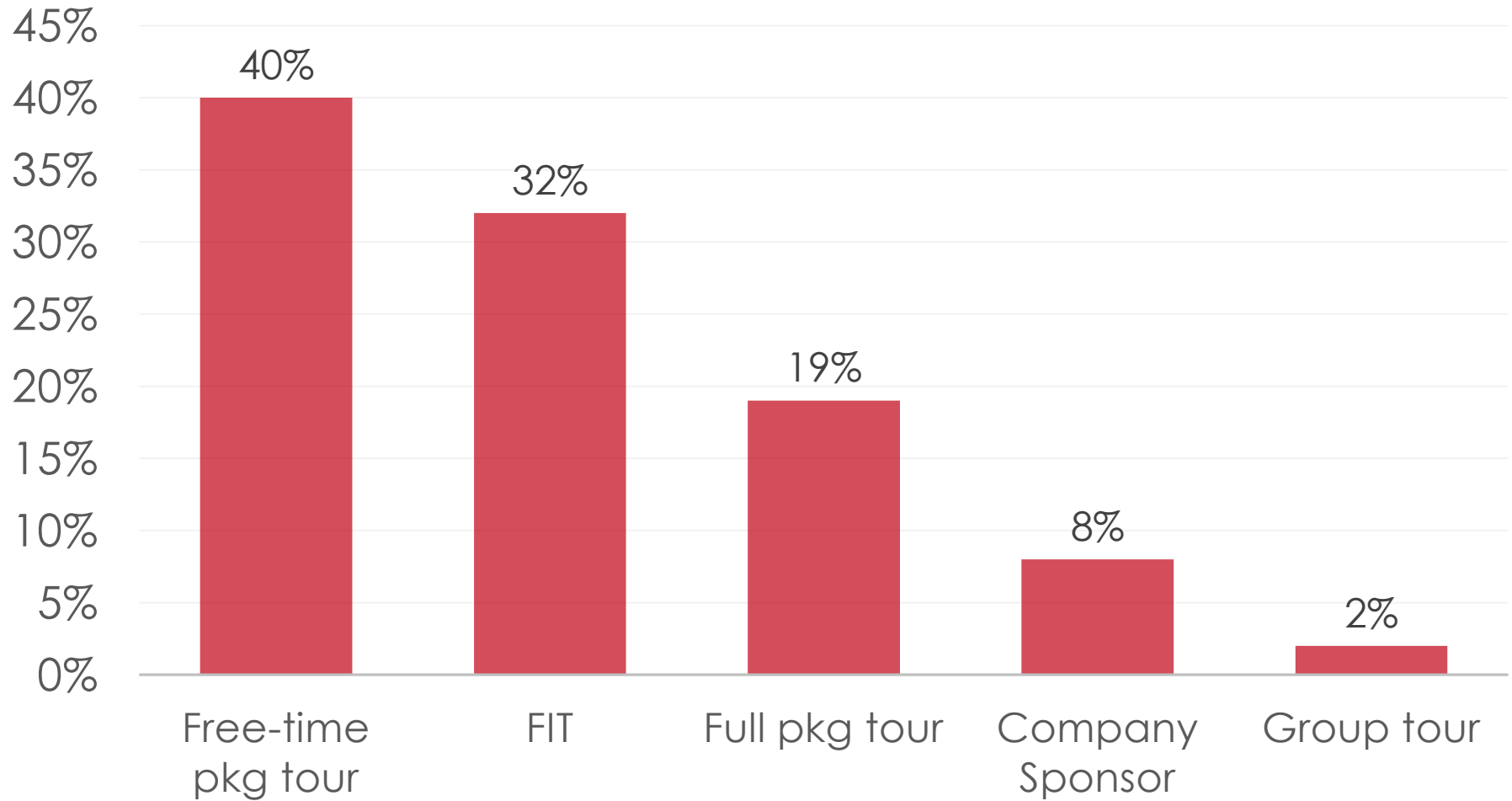
Occupation – Top Responses (10%+)



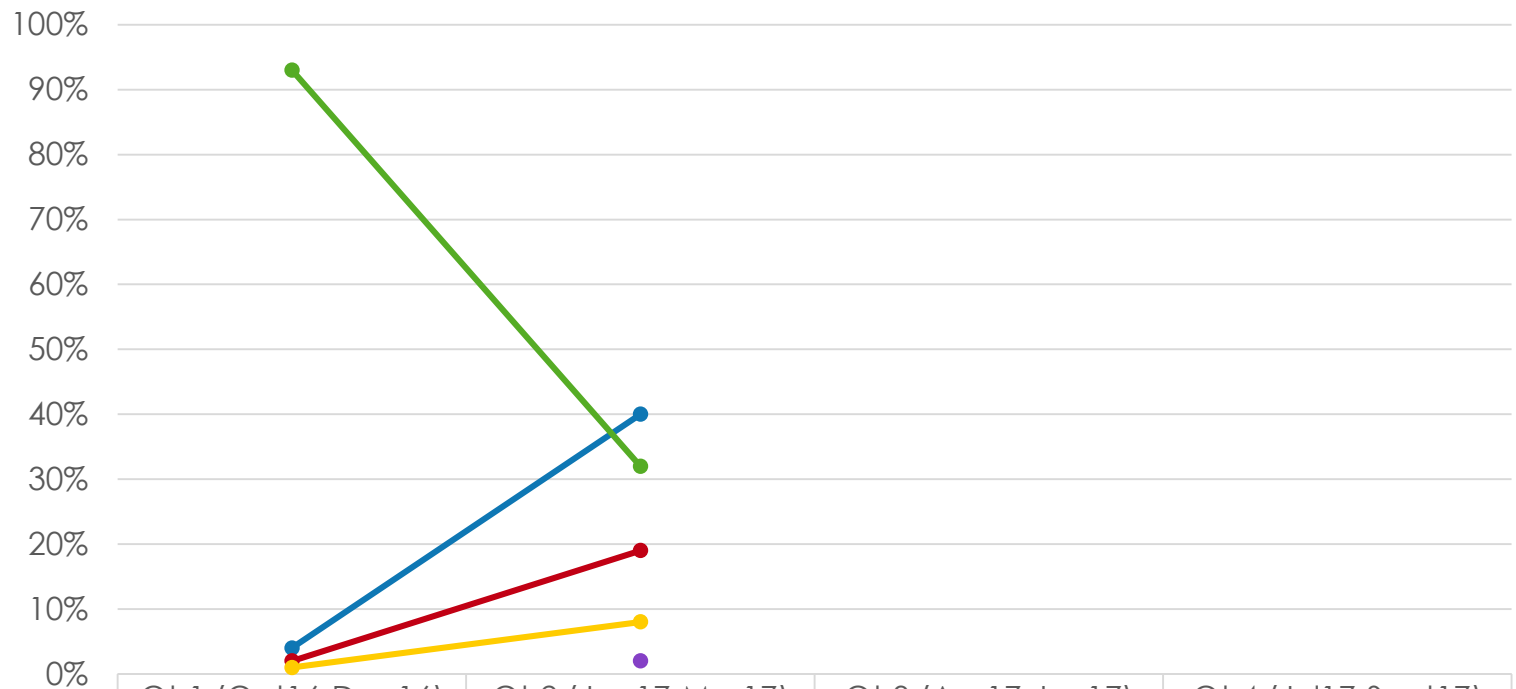
SECTION 2

TRAVEL PLANNING

Travel Planning



Travel Planning – FY2017 Tracking



	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
Free-time pkg tour	4%	40%		
Full pkg tour	2%	19%		
FIT	93%	32%		
Company	1%	8%		
Group		2%		

Travel Planning – Key Segments

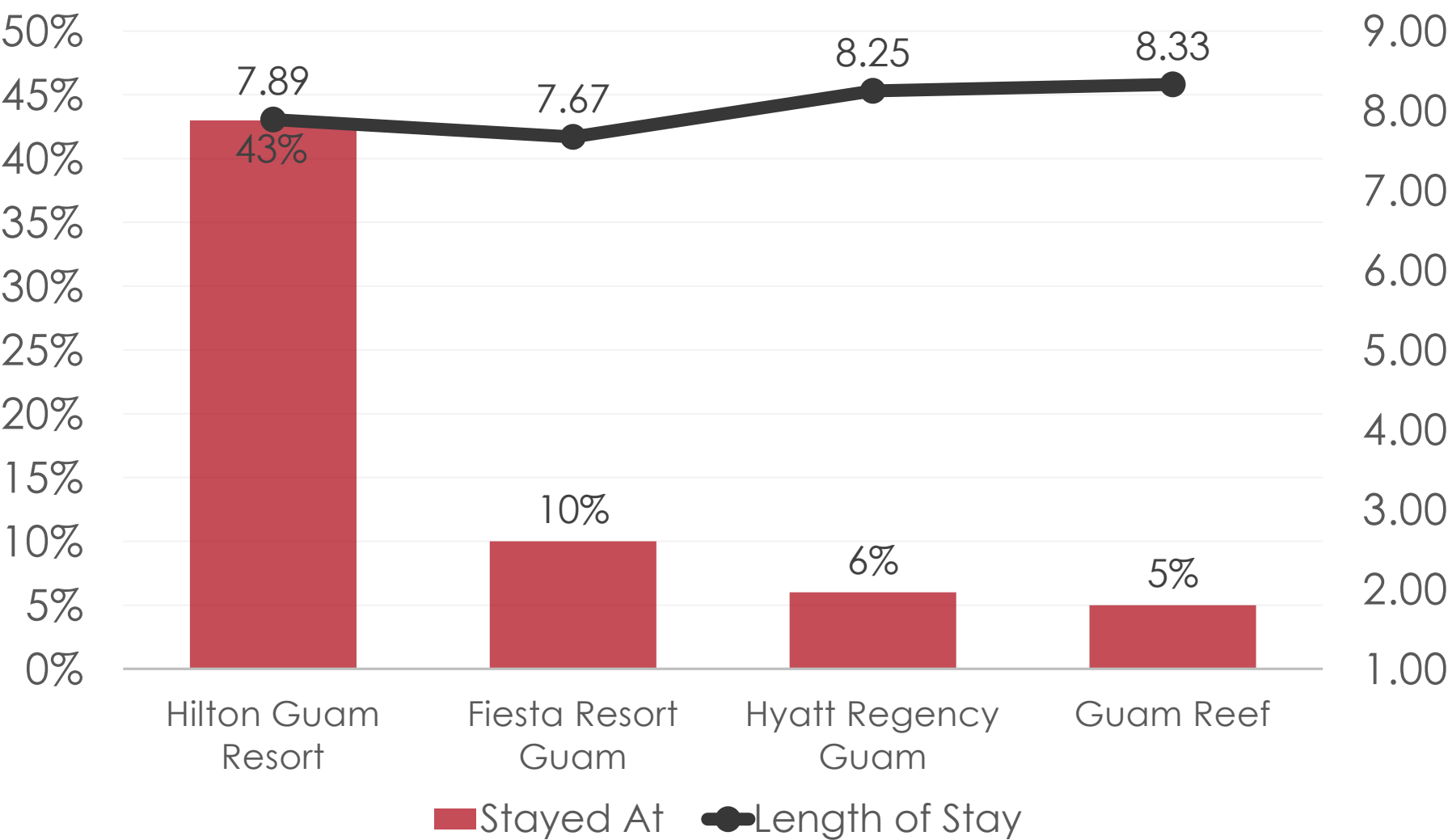
GUAM VISITORS BUREAU - EXIT SURVEY

Q7 Please describe your travel arrangements to Guam?

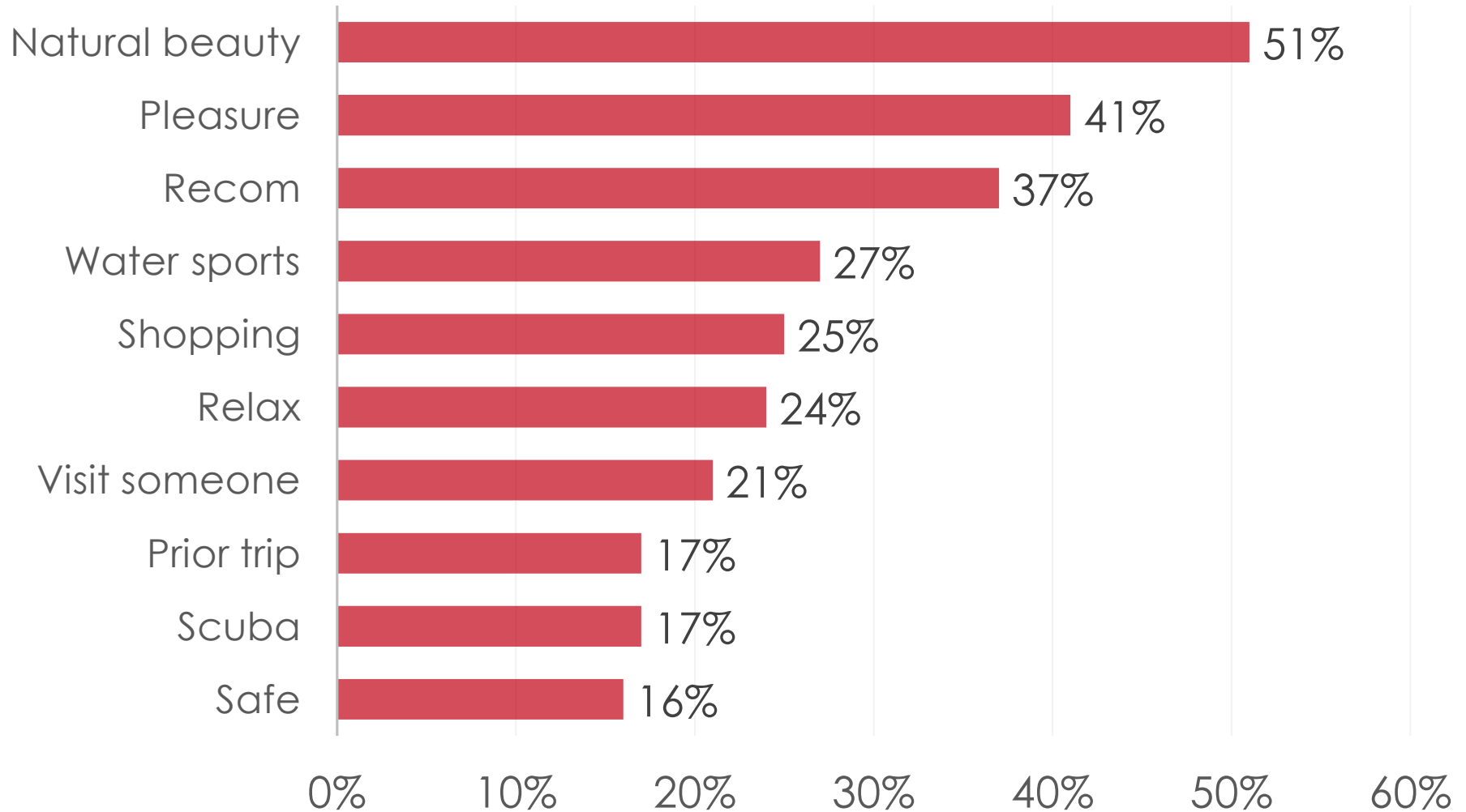
		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
q7	Free-time package tour	40%	53%	55%	55%		33%	50%
	Individually arranged travel (FIT)	32%	21%	18%	18%			28%
	Full package tour	19%	24%	27%	24%	50%	67%	16%
	Company paid travel	8%	3%		3%	50%		6%
	Group tour	2%						
	Total	63	34	22	33	2	3	32

Prepared by QMark Research

Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

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	51%	44%	50%	45%	50%		53%
	Pleasure	41%	44%	36%	45%		100%	22%
	Recomm- friend/family/trvl agnt	37%	32%	36%	33%	50%		38%
	Water sports	27%	32%	32%	30%			53%
	Shopping	25%	32%	23%	30%		33%	25%
	Relax	24%	32%	36%	33%			25%
	Visit friends/ Relatives	21%	26%	32%	27%		67%	22%
	Scuba	17%	26%	27%	27%			34%
	Previous trip	17%	9%	9%	6%	50%		13%
	Safe	16%	12%	9%	12%			6%
	Honeymoon	5%	6%	5%	9%		100%	
	Company/ Business Trip	5%						6%
	Short travel time	5%	6%	9%	6%			9%
	Price	5%	6%	5%	3%			6%
	Organized sports	3%				50%		
	Company Sponsored	3%				100%		
	Other	2%						
	Total	63	34	22	33	2	3	32

Prepared by QMark Research

SECTION 3

EXPENDITURES

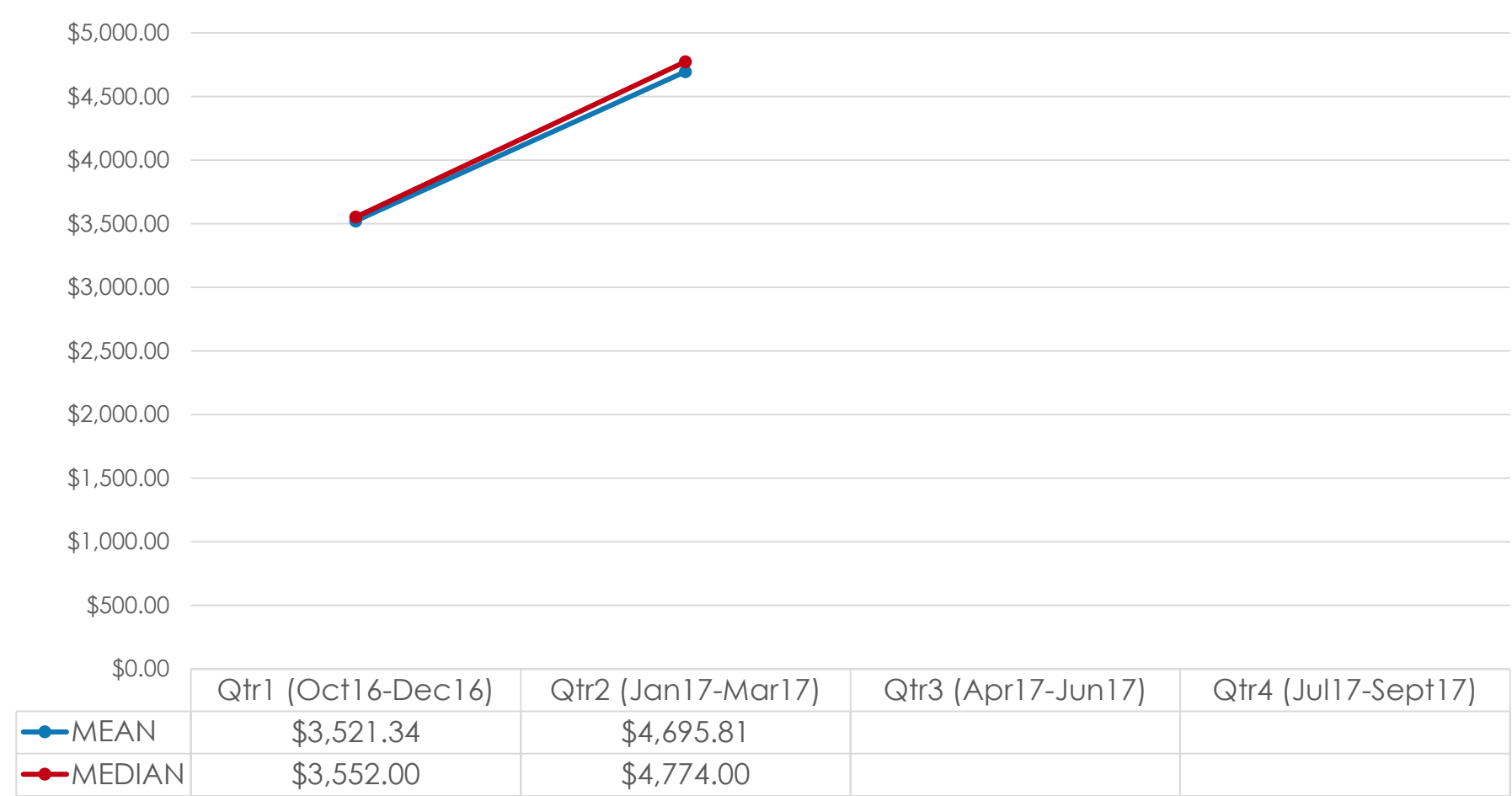
Prepaid Expenditures

EXCHANGE RATE RUBLES 58.65=\$1

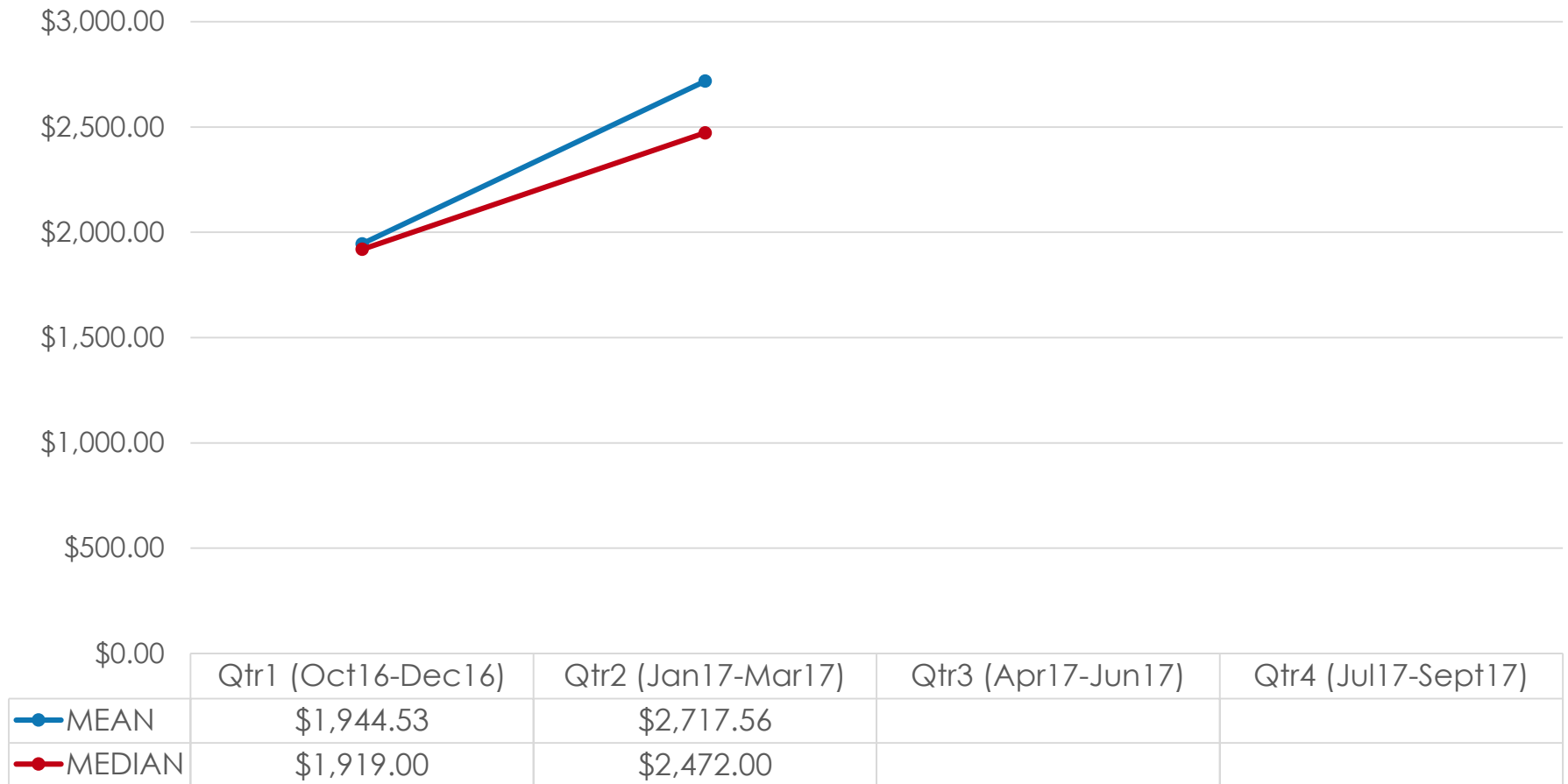
- \$4,695.81 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$2,717.56 = overall mean average per person prepaid expenditures

Prepaid Entire Travel Party – FY2017

Tracking



Prepaid Per Person– FY2017 Tracking



Prepaid Per Person– Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

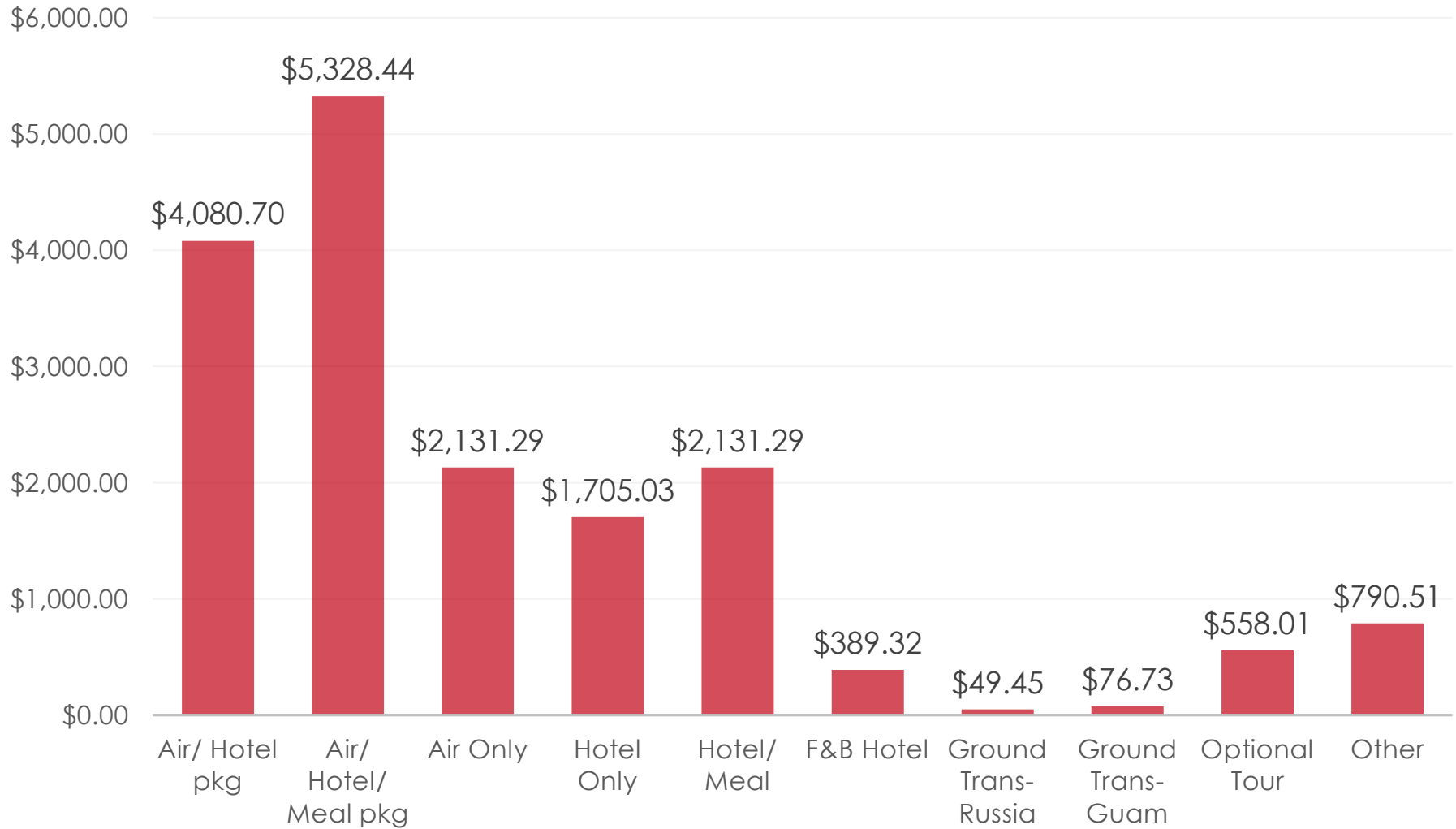
Q10A How much did you pay in Russia before coming to Guam for the tour package, your airfare, lodging meals, and transportation?

PER PERSON

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
RUB\$	Mean	\$2,717.56	\$2,434.05	\$2,603.53	\$2,455.28	\$170.50	\$2,401.25	\$2,971.32
	Median	\$2,472	\$2,217	\$2,302	\$2,217	\$171	\$2,387	\$2,643

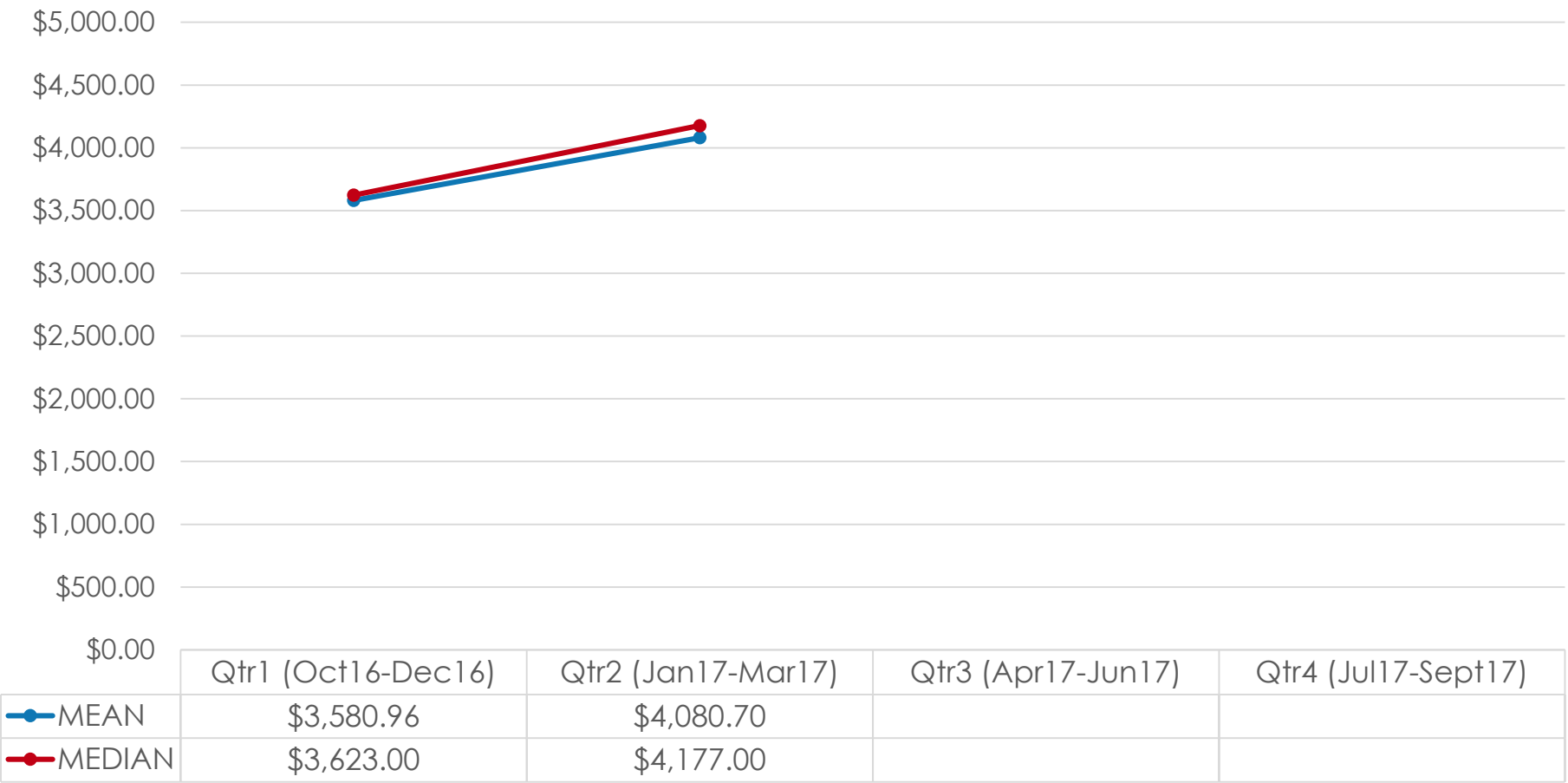
Prepared by QMark Research

Prepaid Expenses by Category – MEAN Entire Travel Party



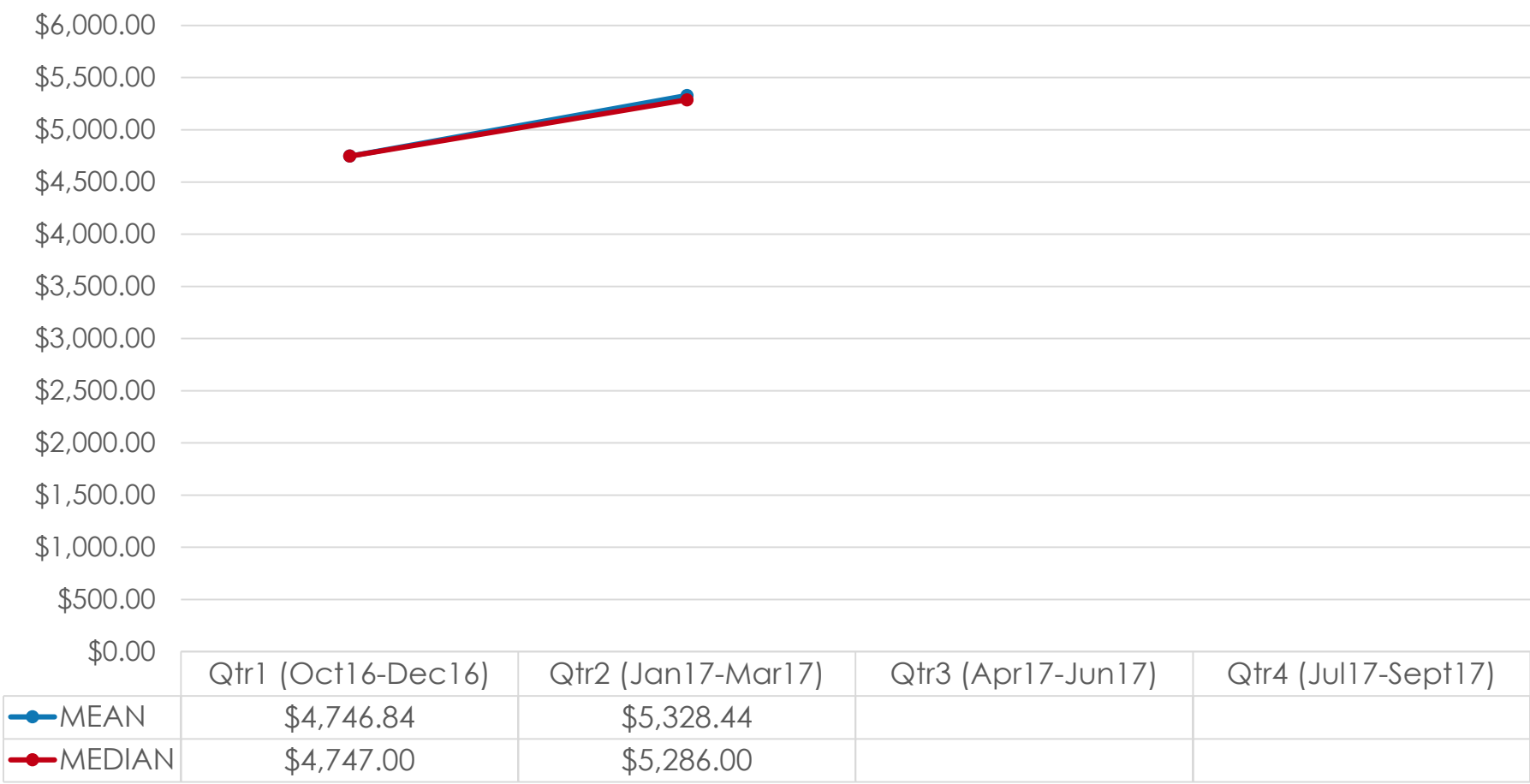
Prepaid– FY2017 Tracking

Airfare & Accommodation Packages



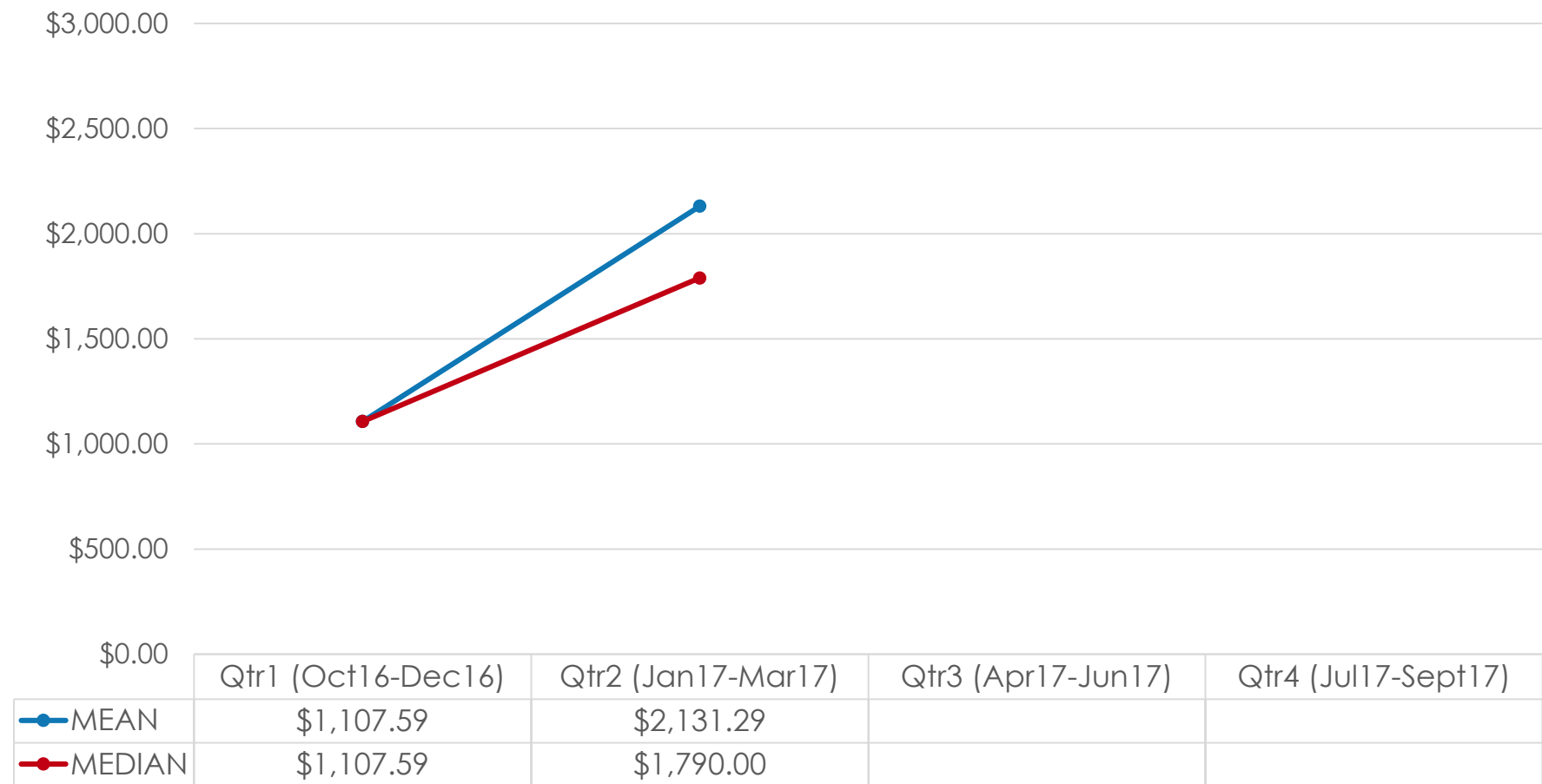
Prepaid– FY2017 Tracking

Airfare & Accommodation W/ Meal Packages



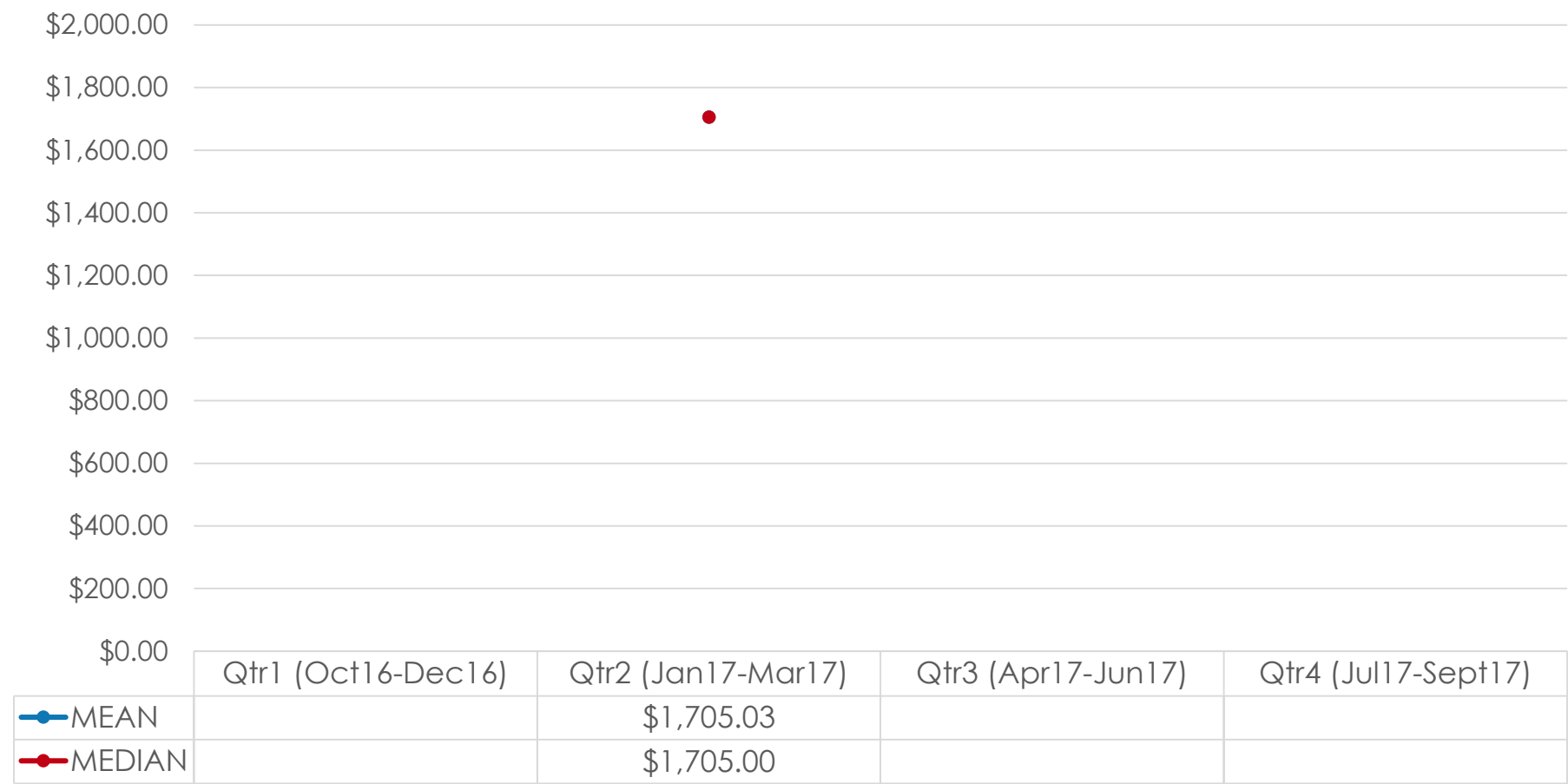
Prepaid– FY2017 Tracking

Airfare Only



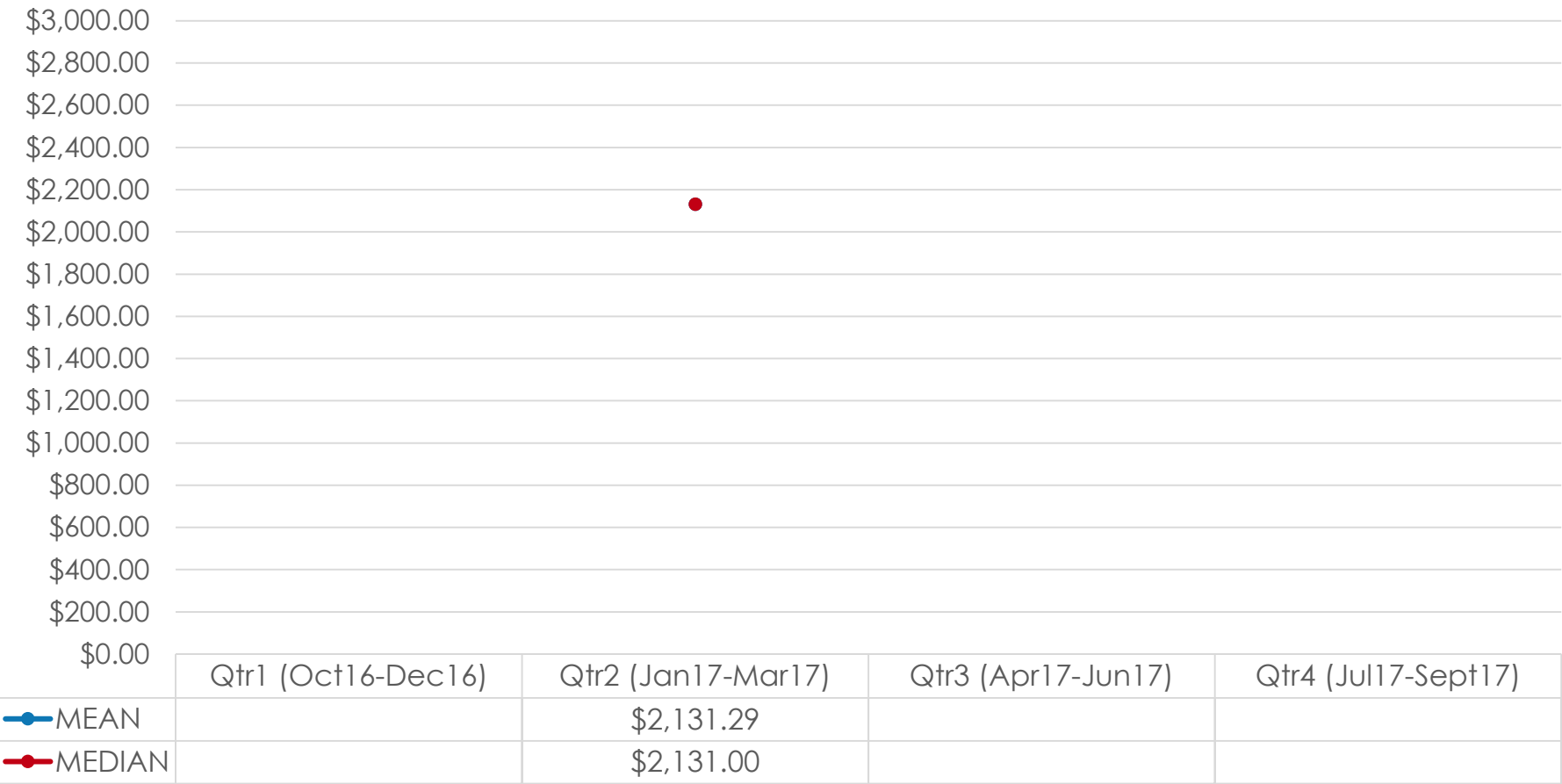
Prepaid– FY2017 Tracking

Accommodations Only



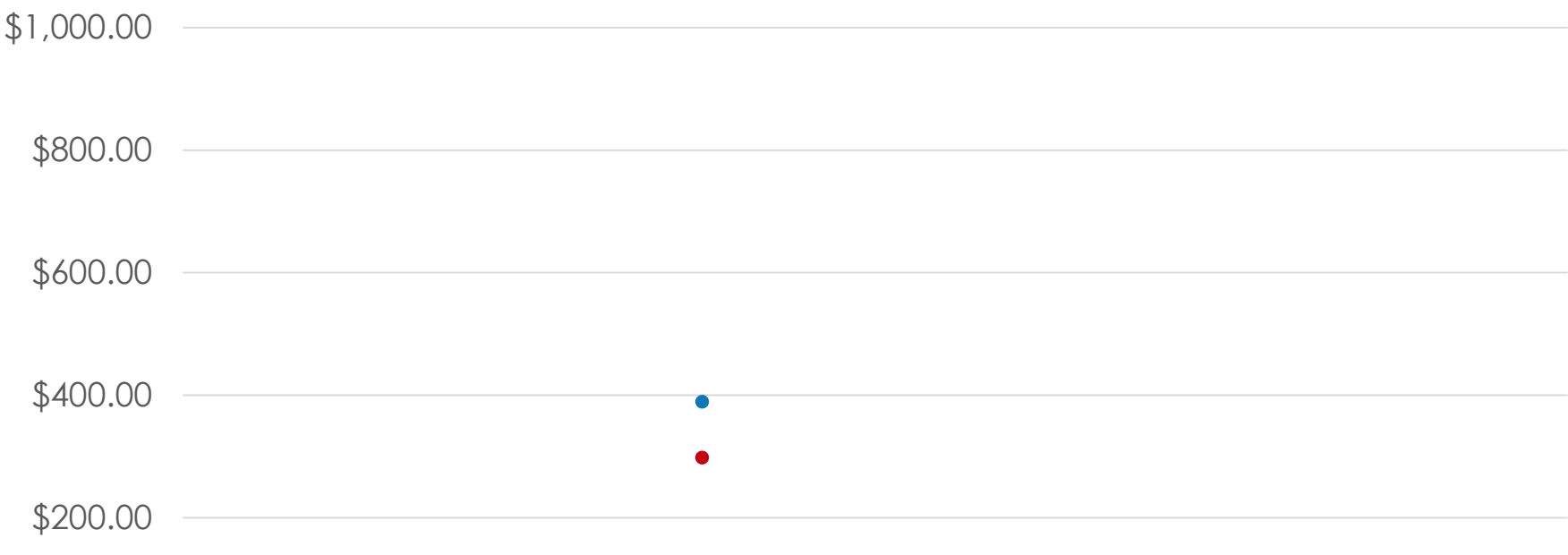
Prepaid– FY2017 Tracking

Accommodations w/ Meal Only



Prepaid– FY2017 Tracking

Food & Beverage in Hotel



	Qtr1 (Oct16-Dec16)	Qtr2 (Jan17-Mar17)	Qtr3 (Apr17-Jun17)	Qtr4 (Jul17-Sept17)
MEAN		\$389.32		
MEDIAN		\$298.00		

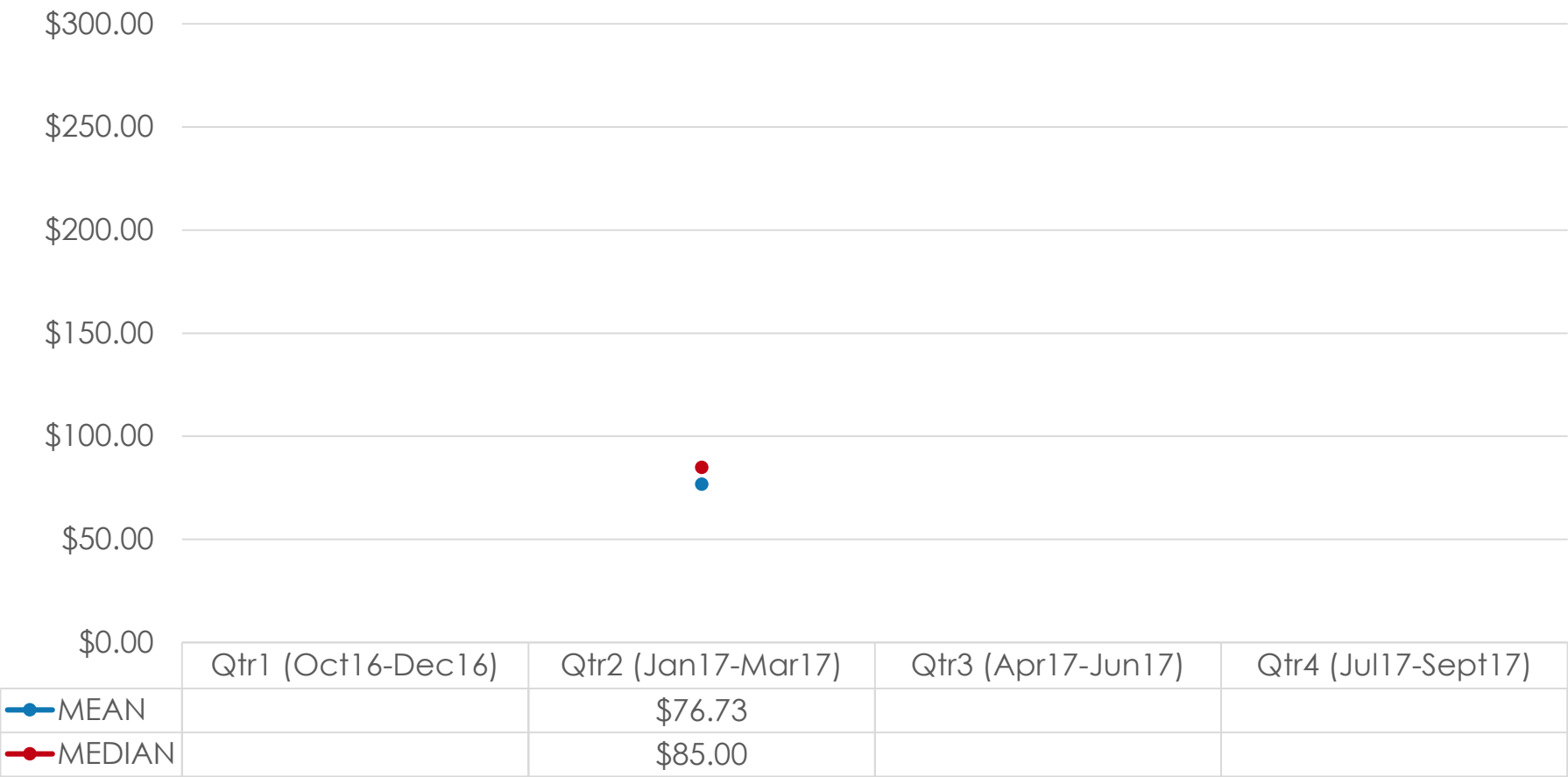
Prepaid– FY2017 Tracking

Ground Transportation - Russia



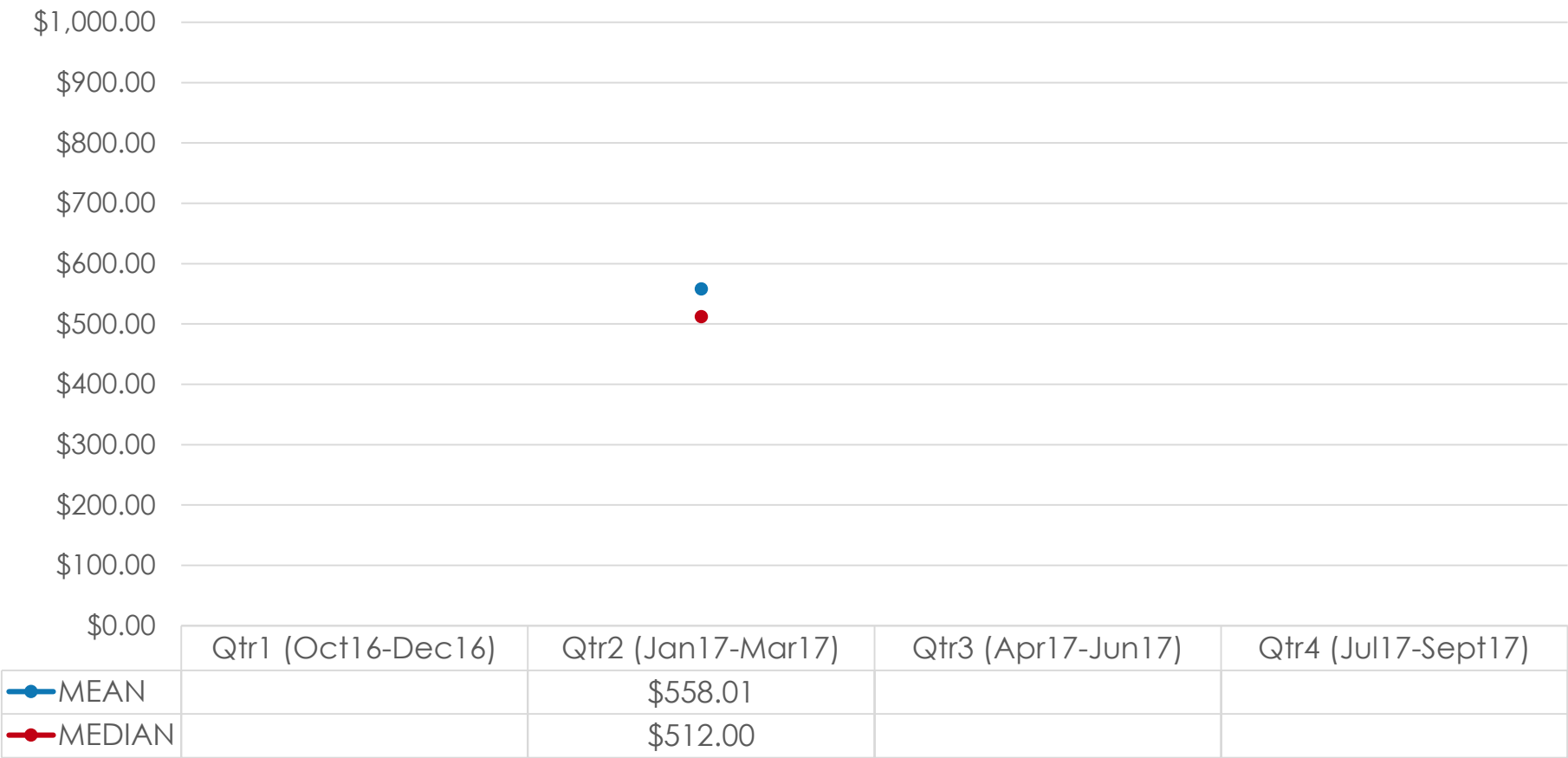
Prepaid– FY2017 Tracking

Ground Transportation - Guam



Prepaid– FY2017 Tracking

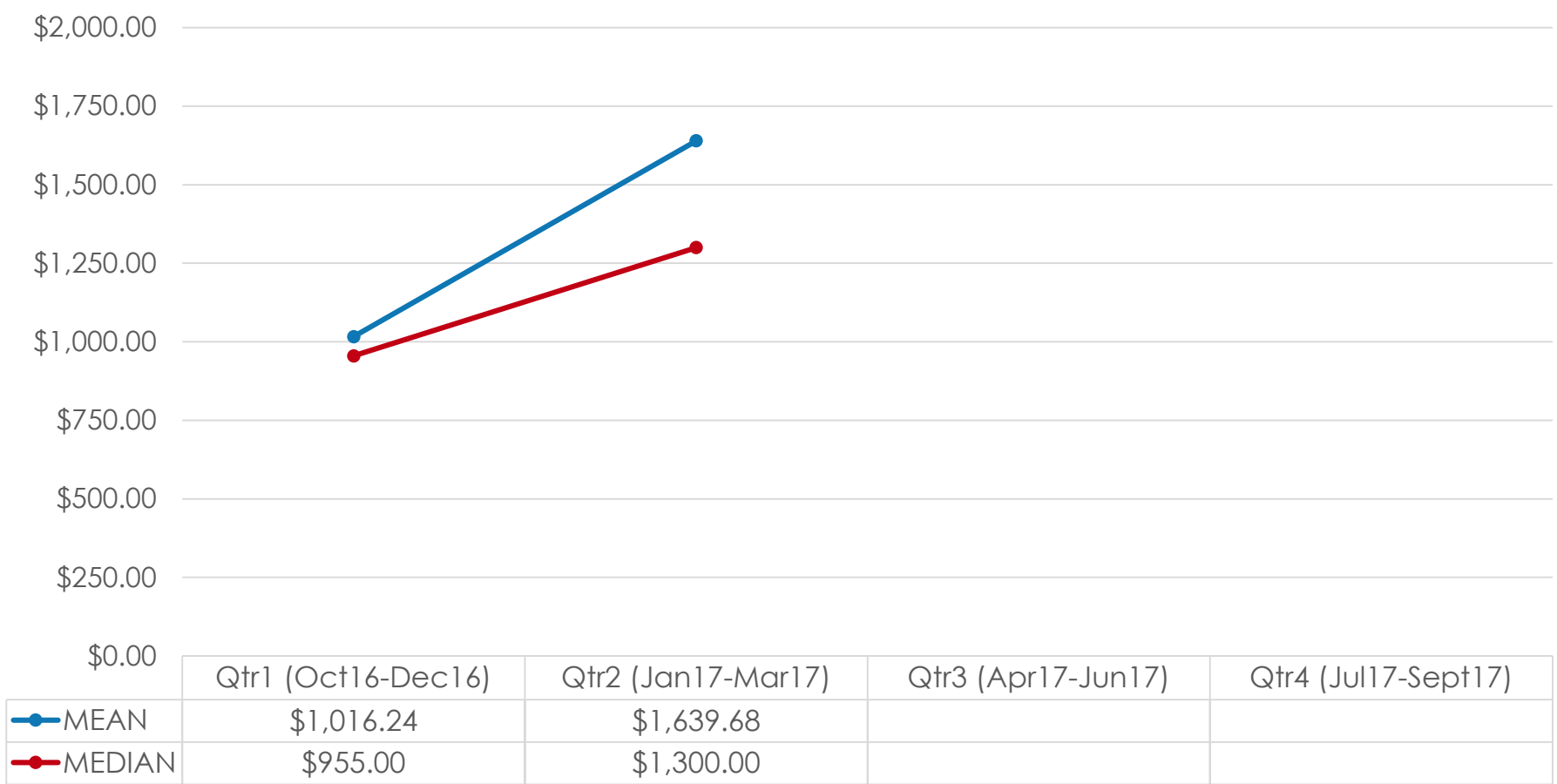
Optional tours/ Activities



On-Island Expenditures

- \$1,639.68 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$931.65 = overall mean average per person prepaid expenditures

On-Island Entire Travel Party – FY2017 Tracking



On-Island Per Person – FY2017 Tracking



On-Island Per Person – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

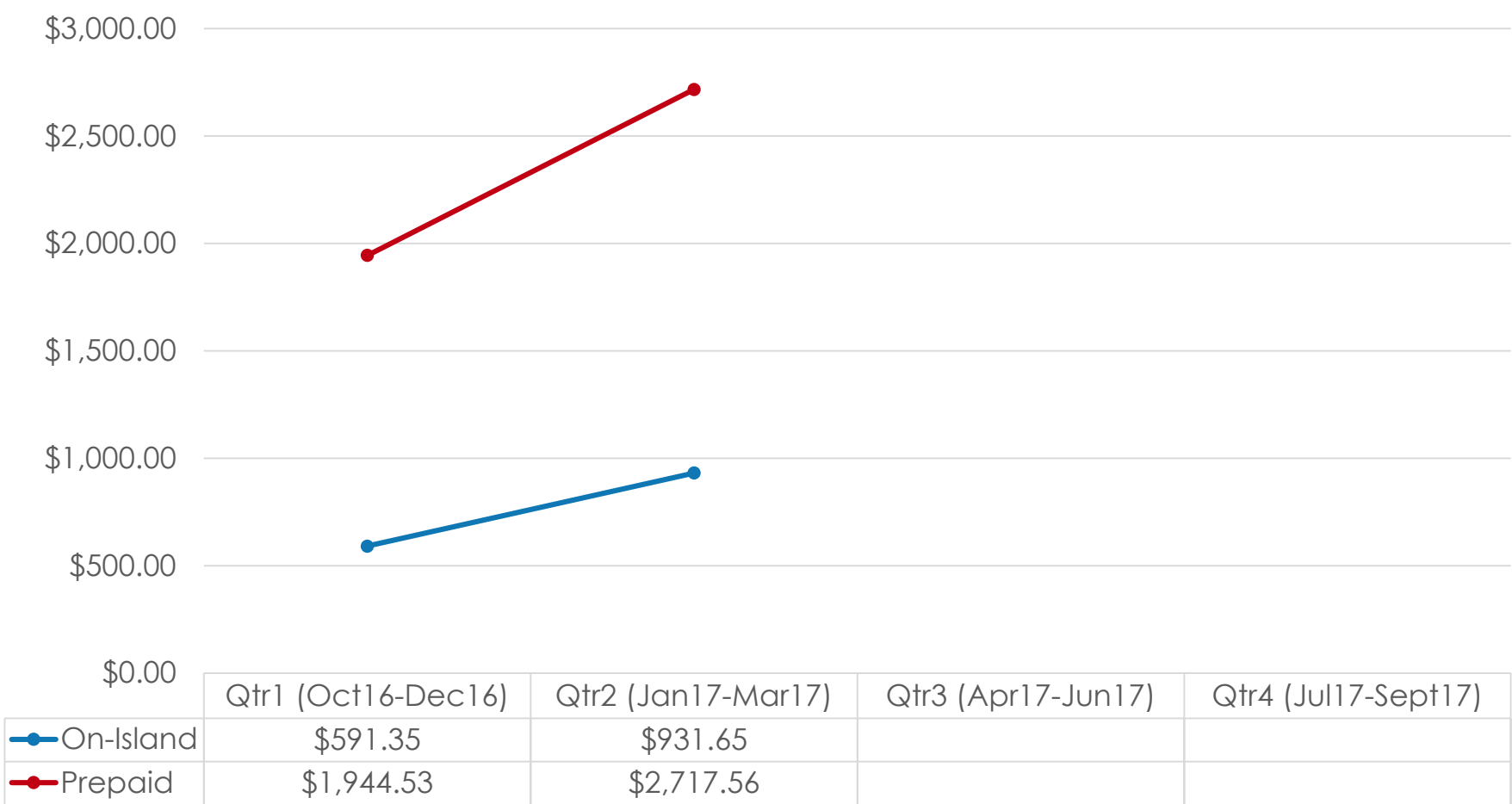
Q11A How much in total did you spend while on Guam during this trip?

PER PERSON

		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
ONISLE	Mean	\$931.65	\$803.50	\$862.61	\$828.36	\$550.00	\$1,708.33	\$957.45
	Median	\$750	\$625	\$658	\$650	\$550	\$850	\$725

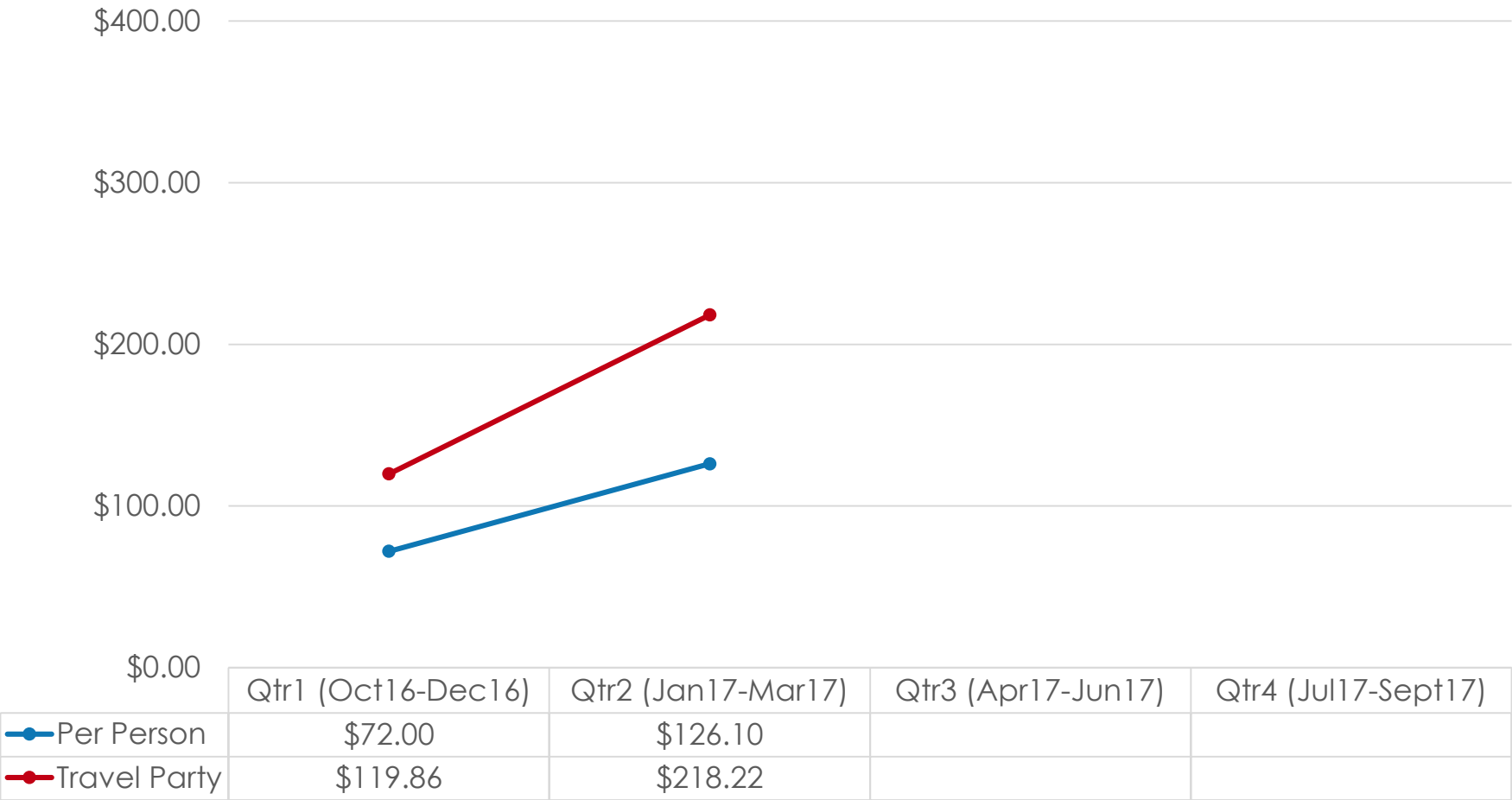
Prepared by QMark Research

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



On-Island Per Day Spending – FY2017 Tracking

MEAN

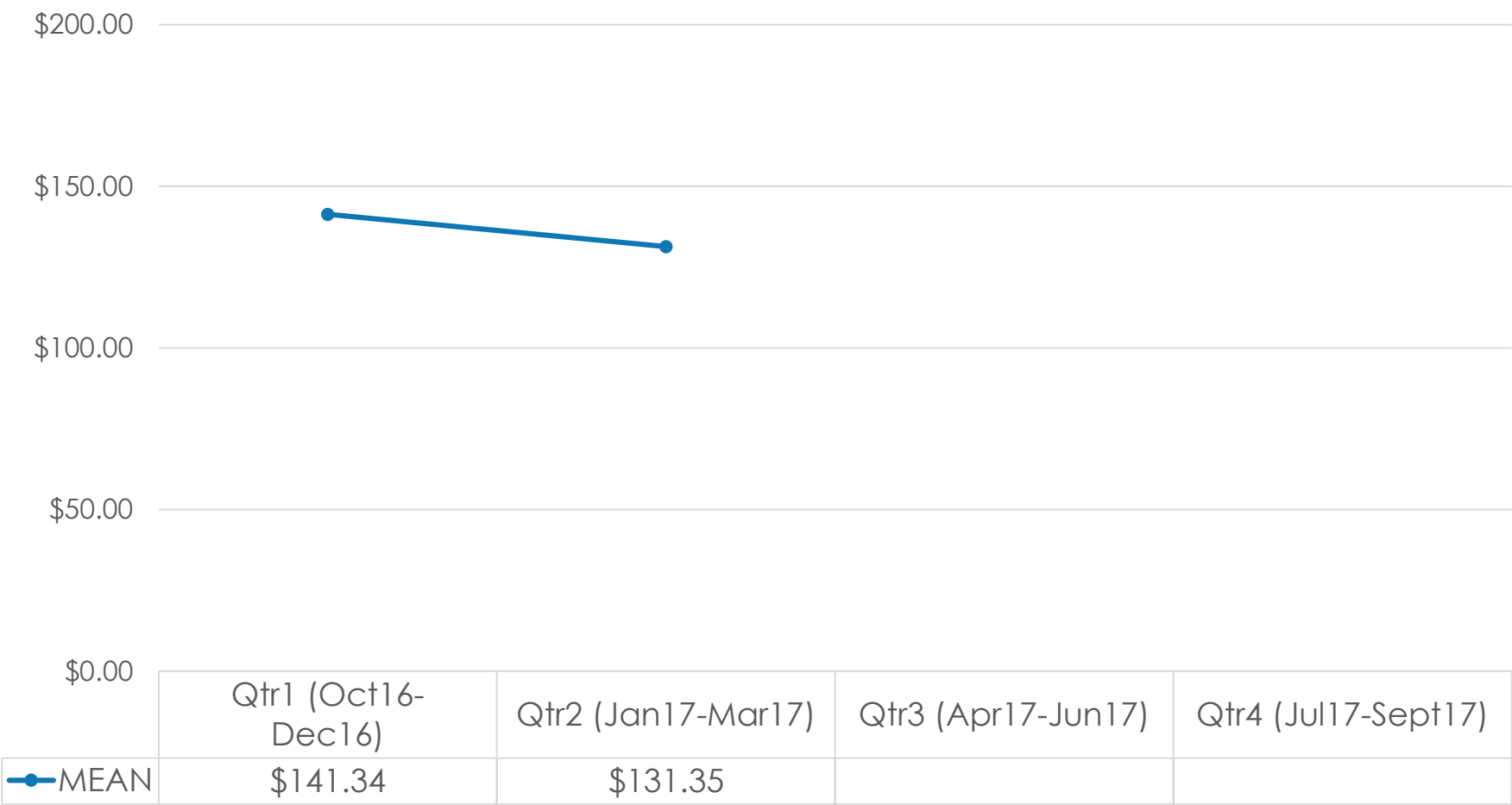


On-Island Expenses by Category – MEAN Entire Travel Party



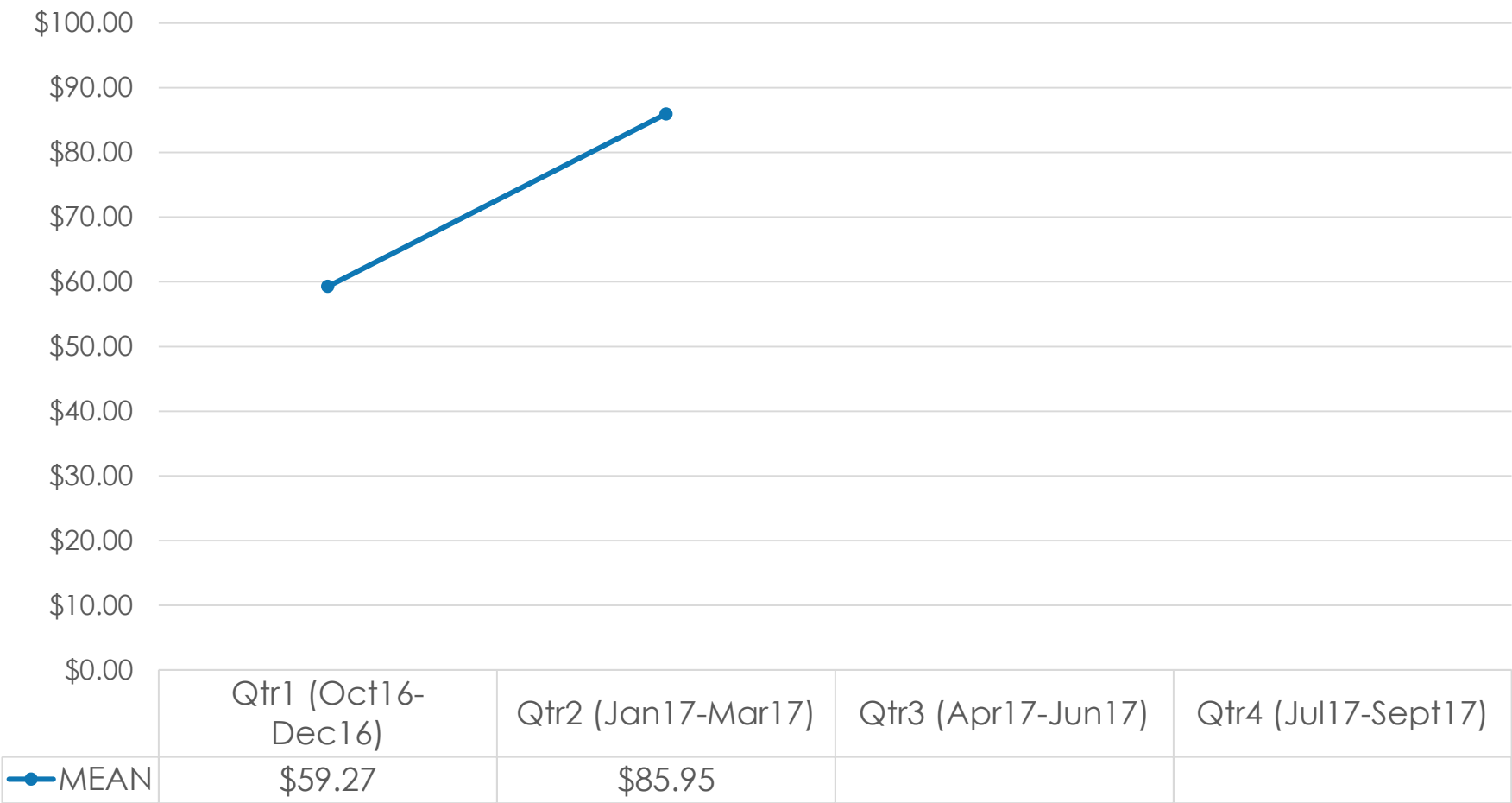
On-Island – FY2017 Tracking

Food & Beverage - Hotel



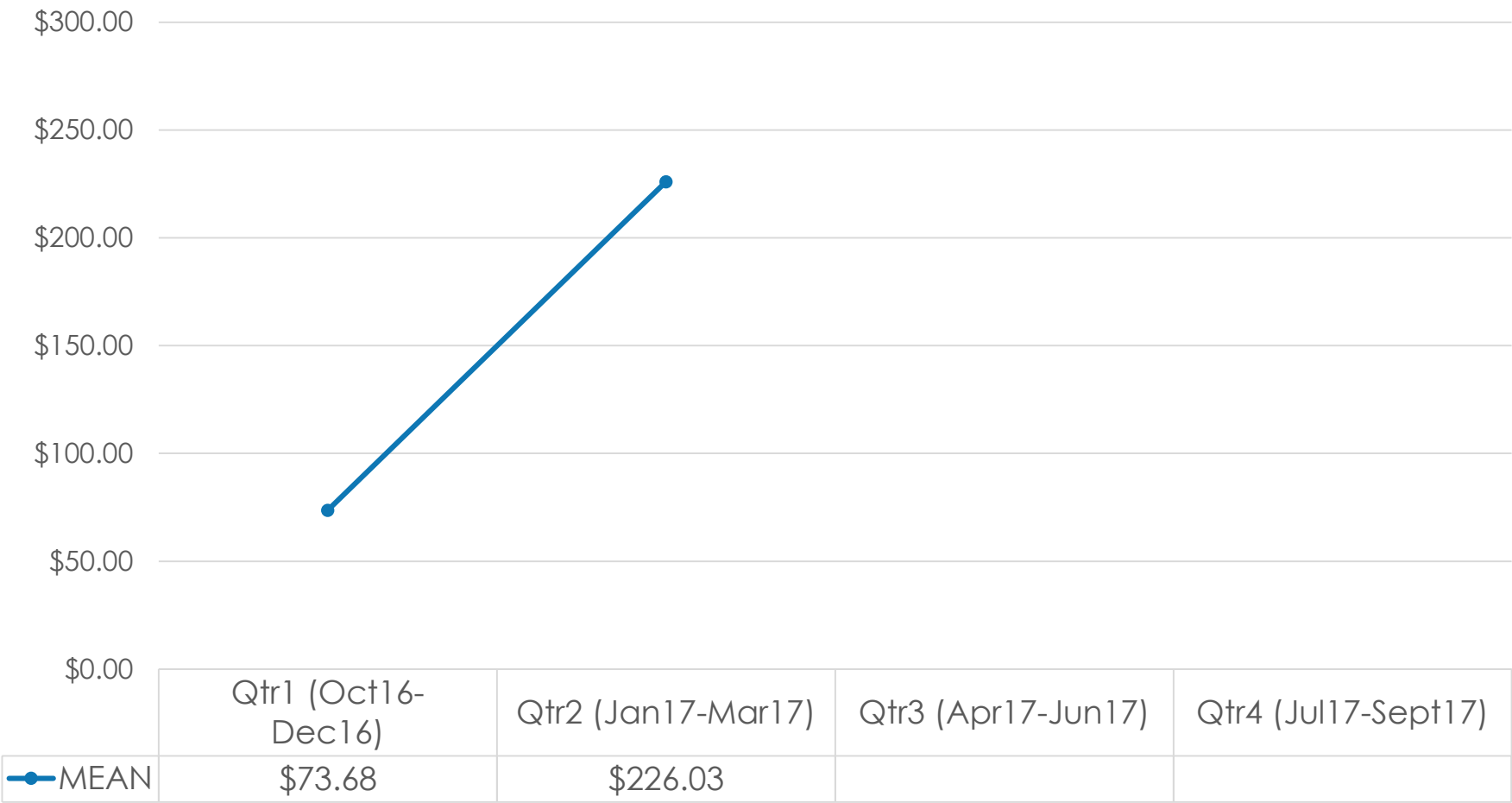
On-Island – FY2017 Tracking

Food & Beverage – Fast Food/ Convenience Store



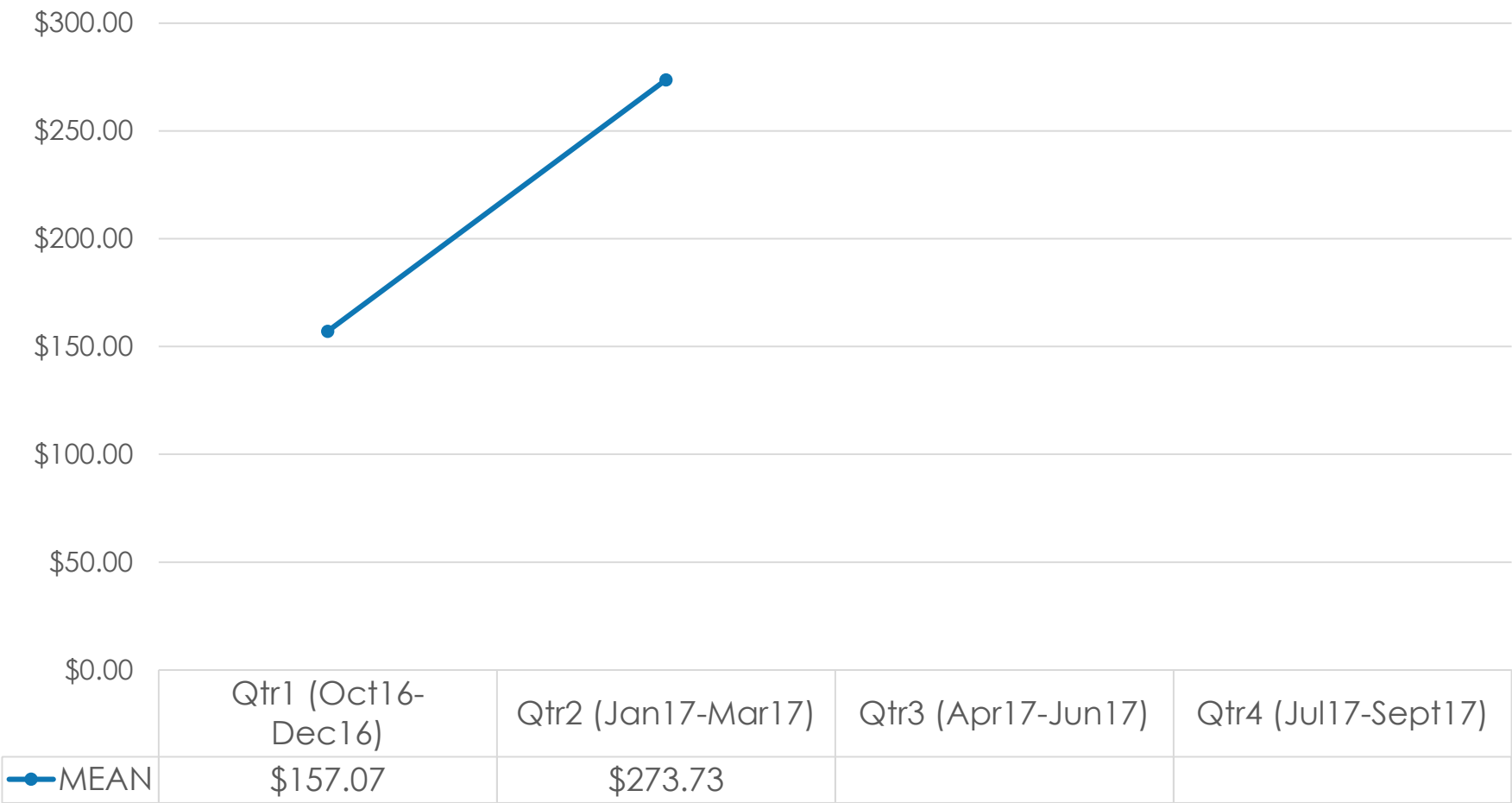
On-Island – FY2017 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



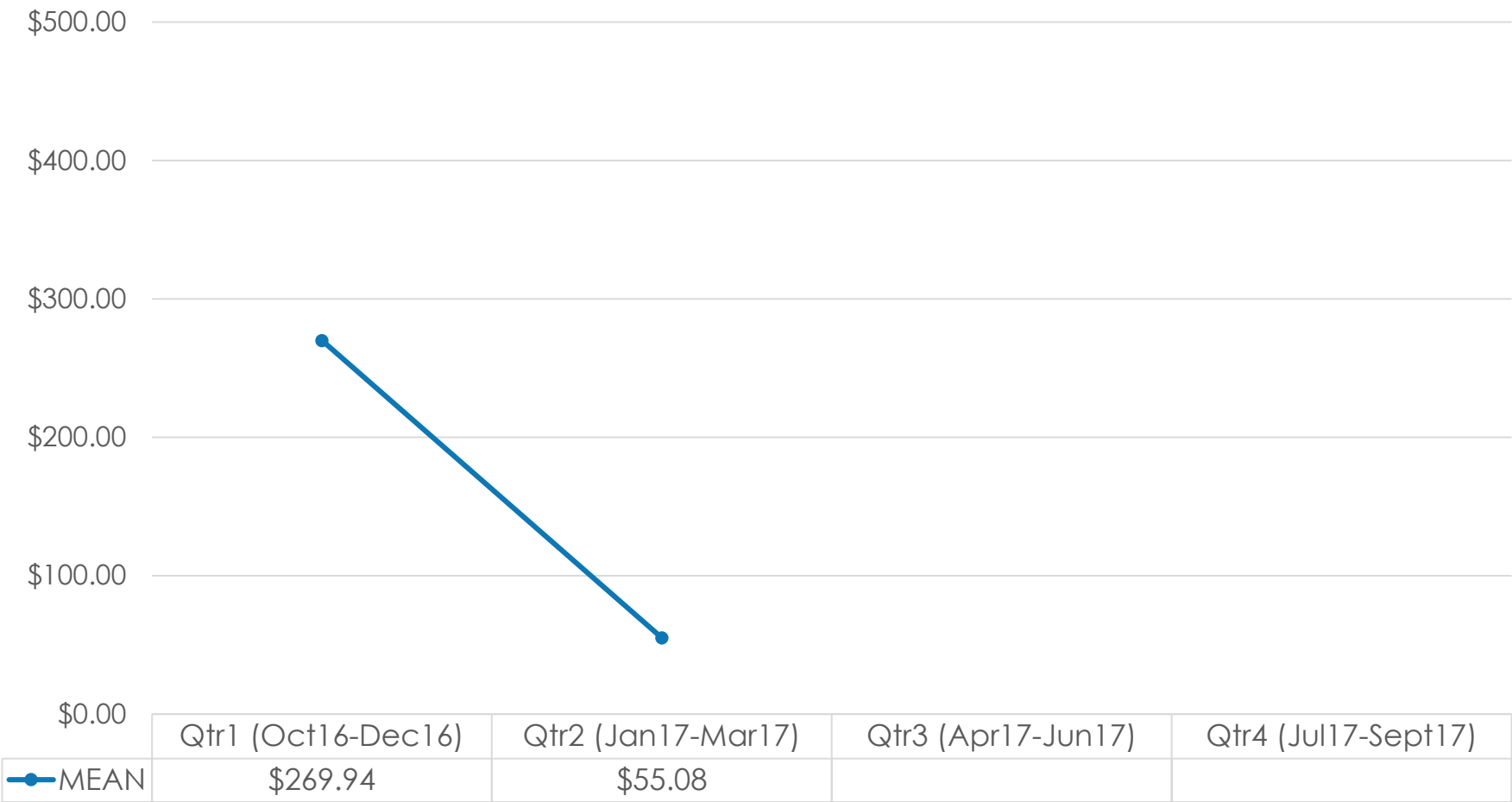
On-Island – FY2017 Tracking

Optional tour/ Activities



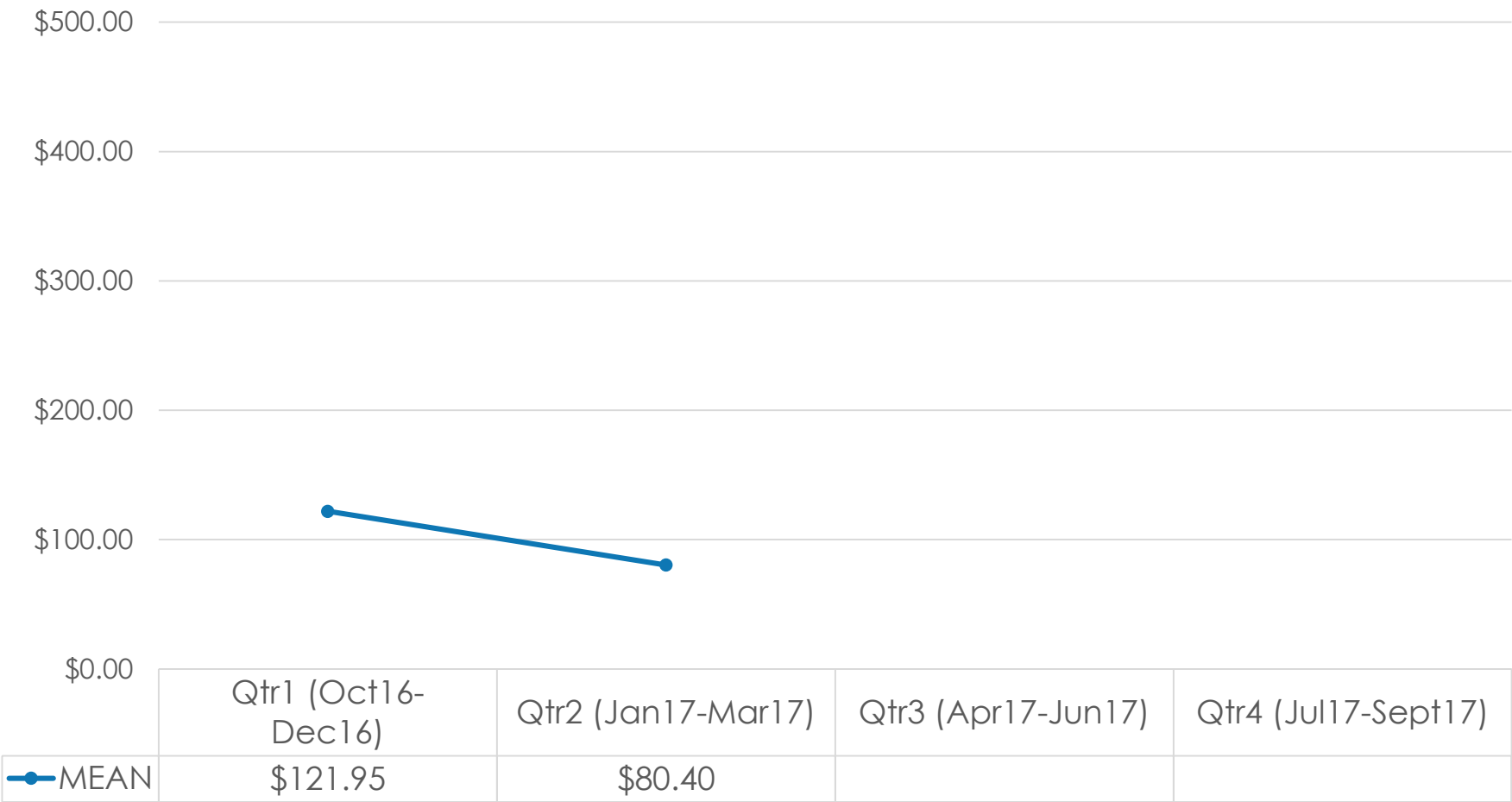
On-Island – FY2017 Tracking

Gift/ Souvenir – Self/ Companion



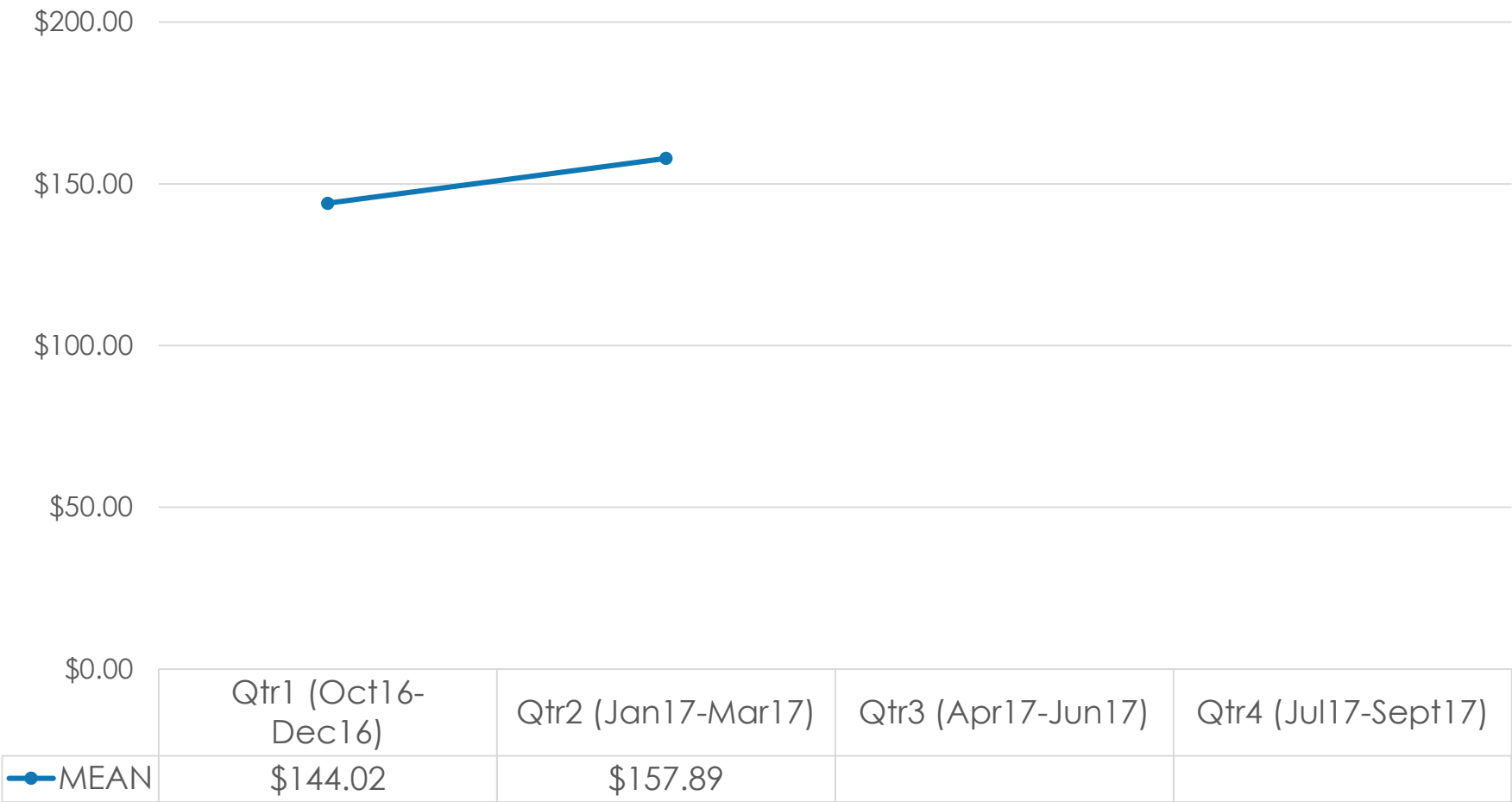
On-Island – FY2017 Tracking

Gift/ Souvenir – Friends/ Family



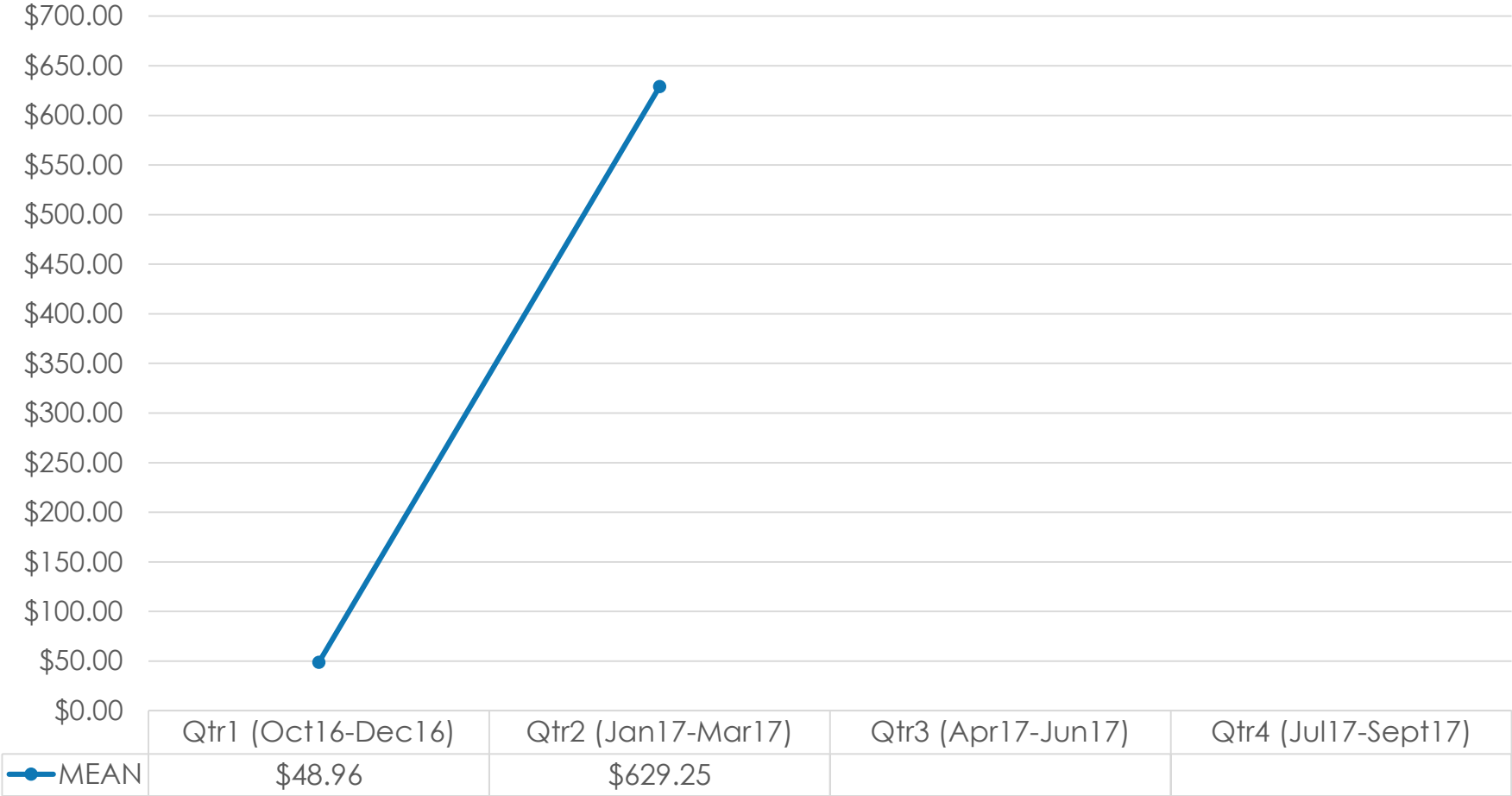
On-Island – FY2017 Tracking

Local Transportation



On-Island – FY2017 Tracking

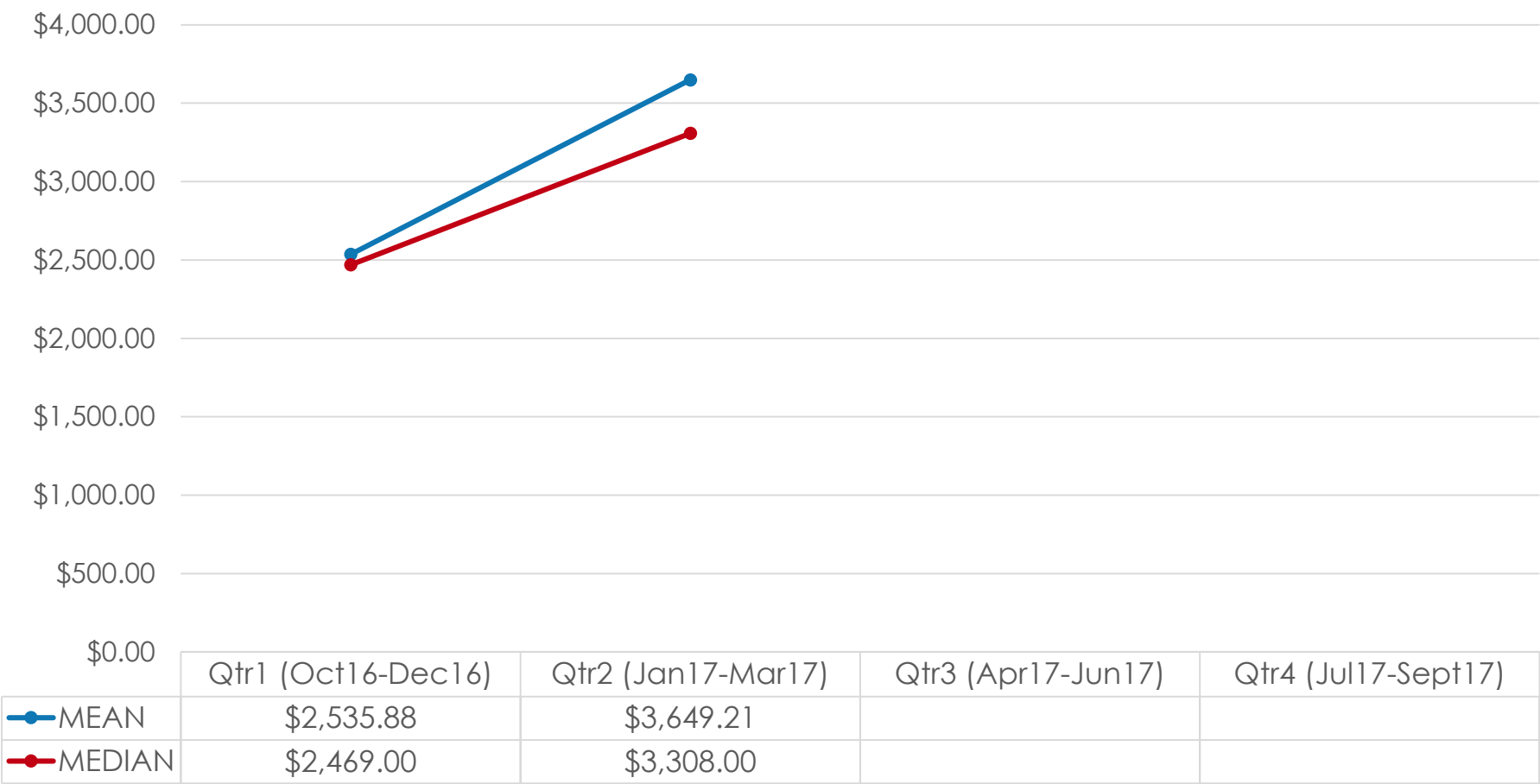
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$3,649.21 = overall mean average prepaid expense by respondent/ Per Person

TOTAL Per Person Expenditures – FY2017 Tracking



TOTAL Per Person Expenditures – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

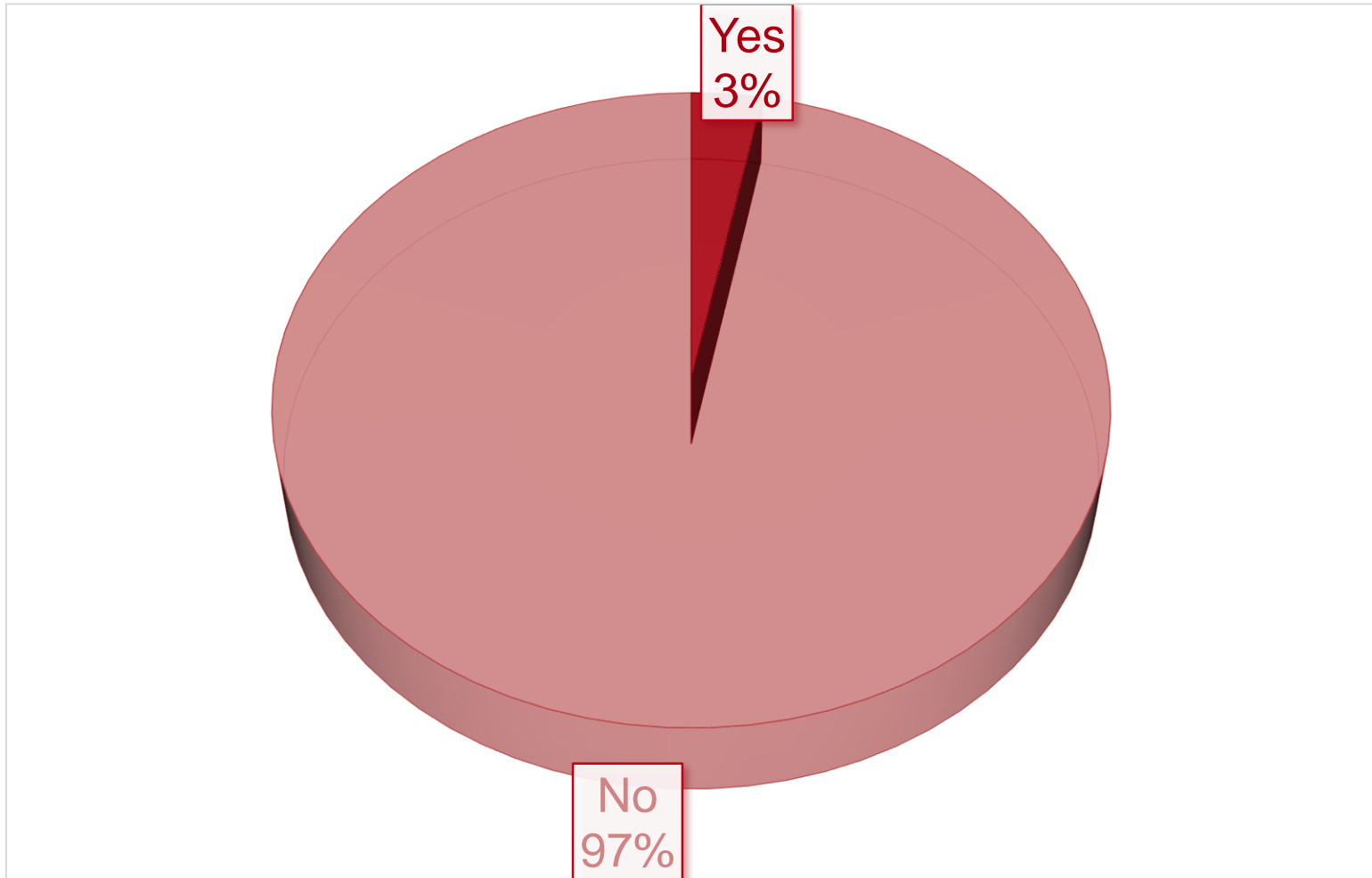
TOTAL EXPENDITURES (On-Isle / Prepaid)

PER PERSON

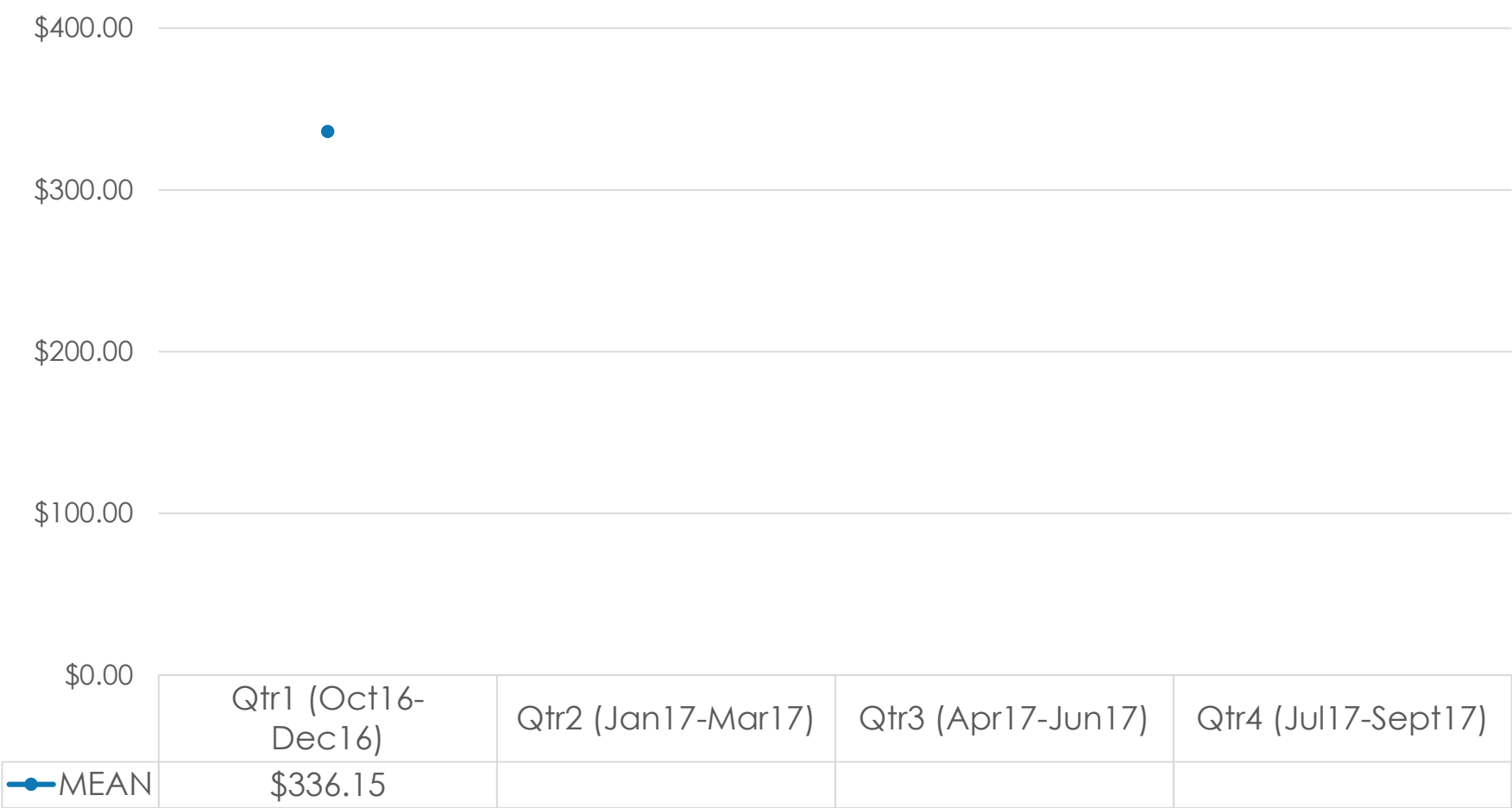
		TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
		-	-	-	-	-	-	-
TOTAL PP	Mean	\$3,649.21	\$3,237.55	\$3,466.14	\$3,283.64	\$720.50	\$4,109.58	\$3,928.76
	Median	\$3,308	\$3,003	\$3,046	\$3,037	\$721	\$3,237	\$3,386

Prepared by QMark Research

PARTICIPATED IN SHOP GUAM e-FESTIVAL



SHOP GUAM E-FESTIVAL SPENDING – FY2017 Tracking (none recorded)

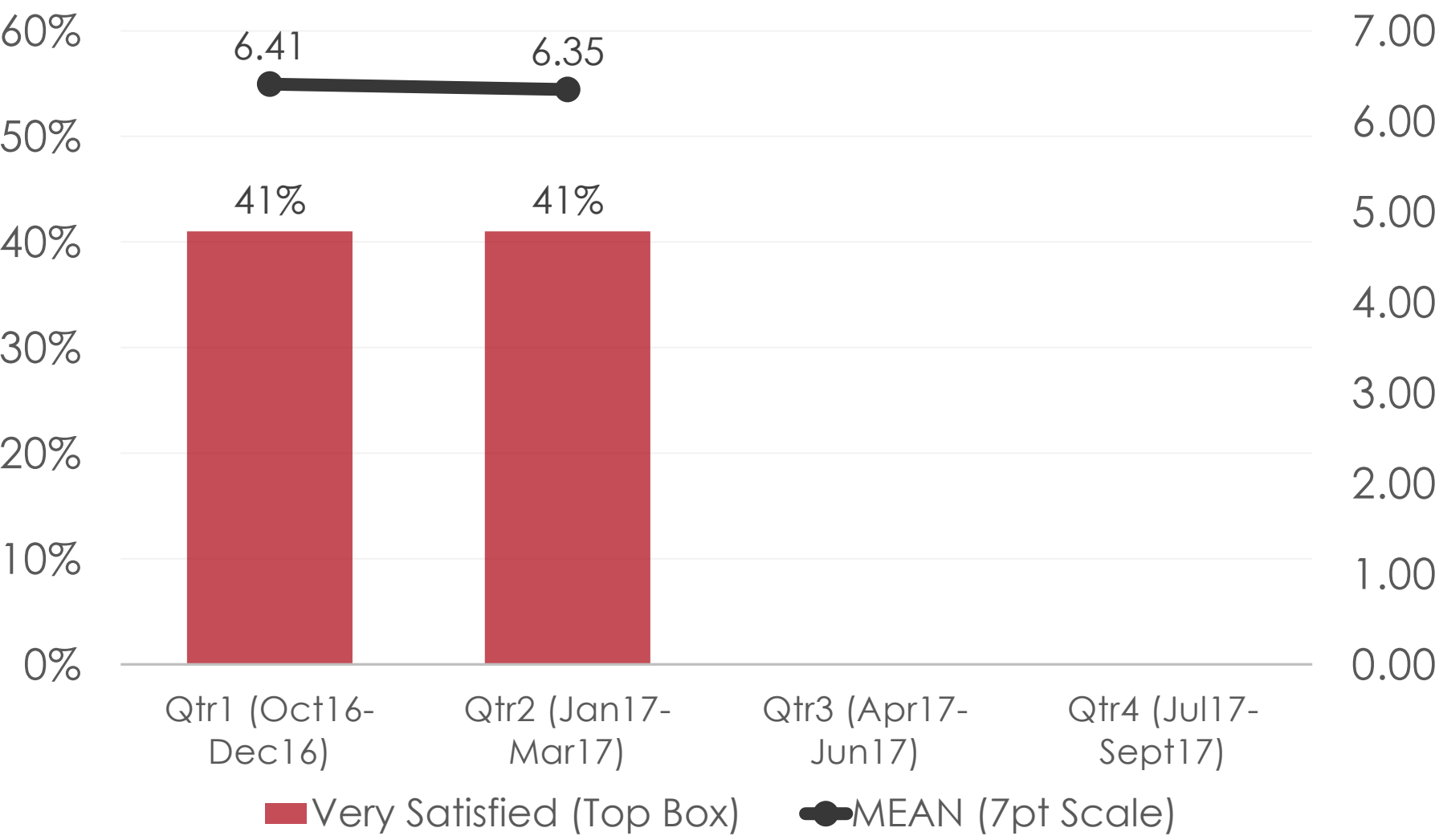


SECTION 4

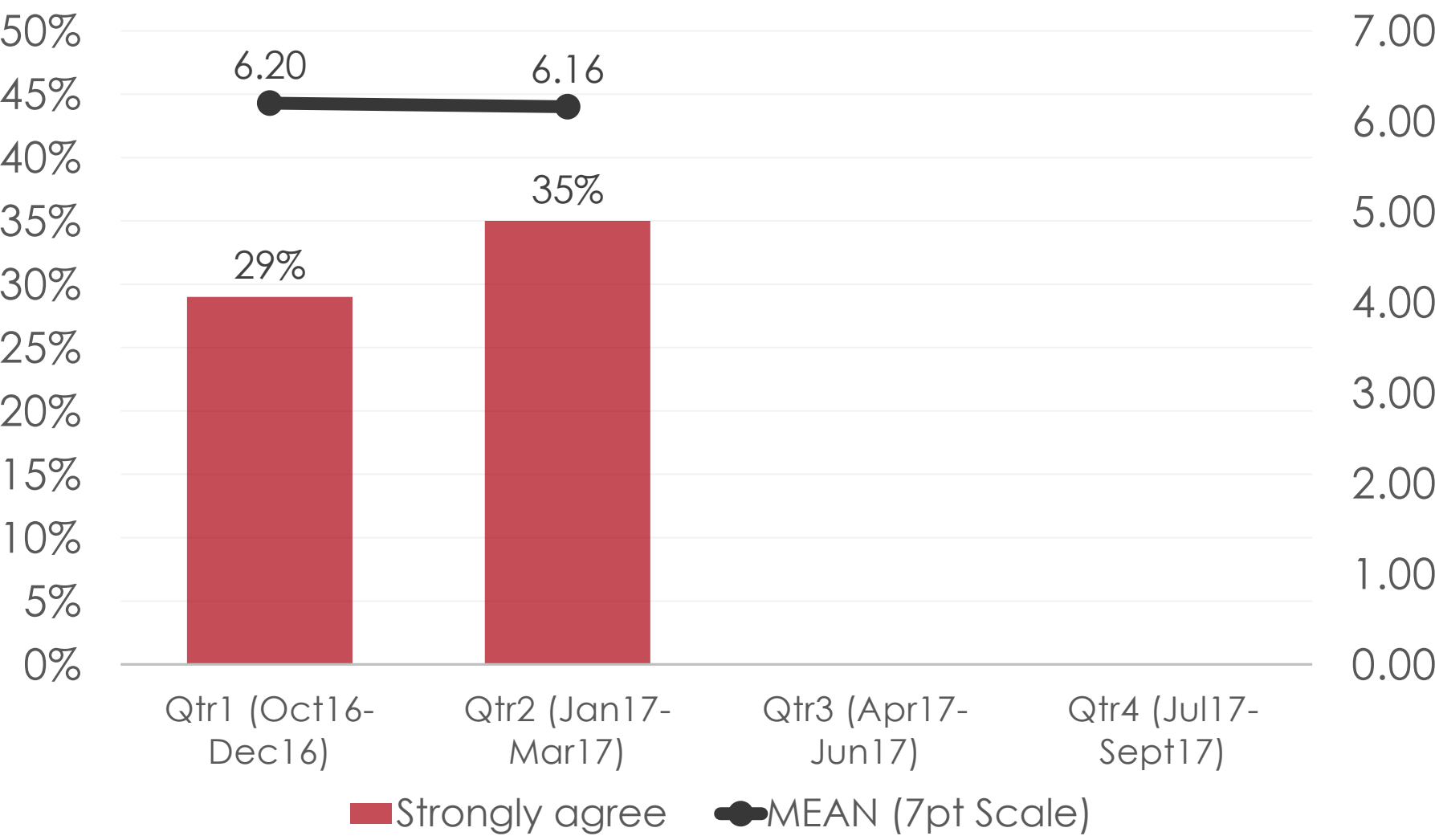
VISITOR SATISFACTION

BEHAVIOR

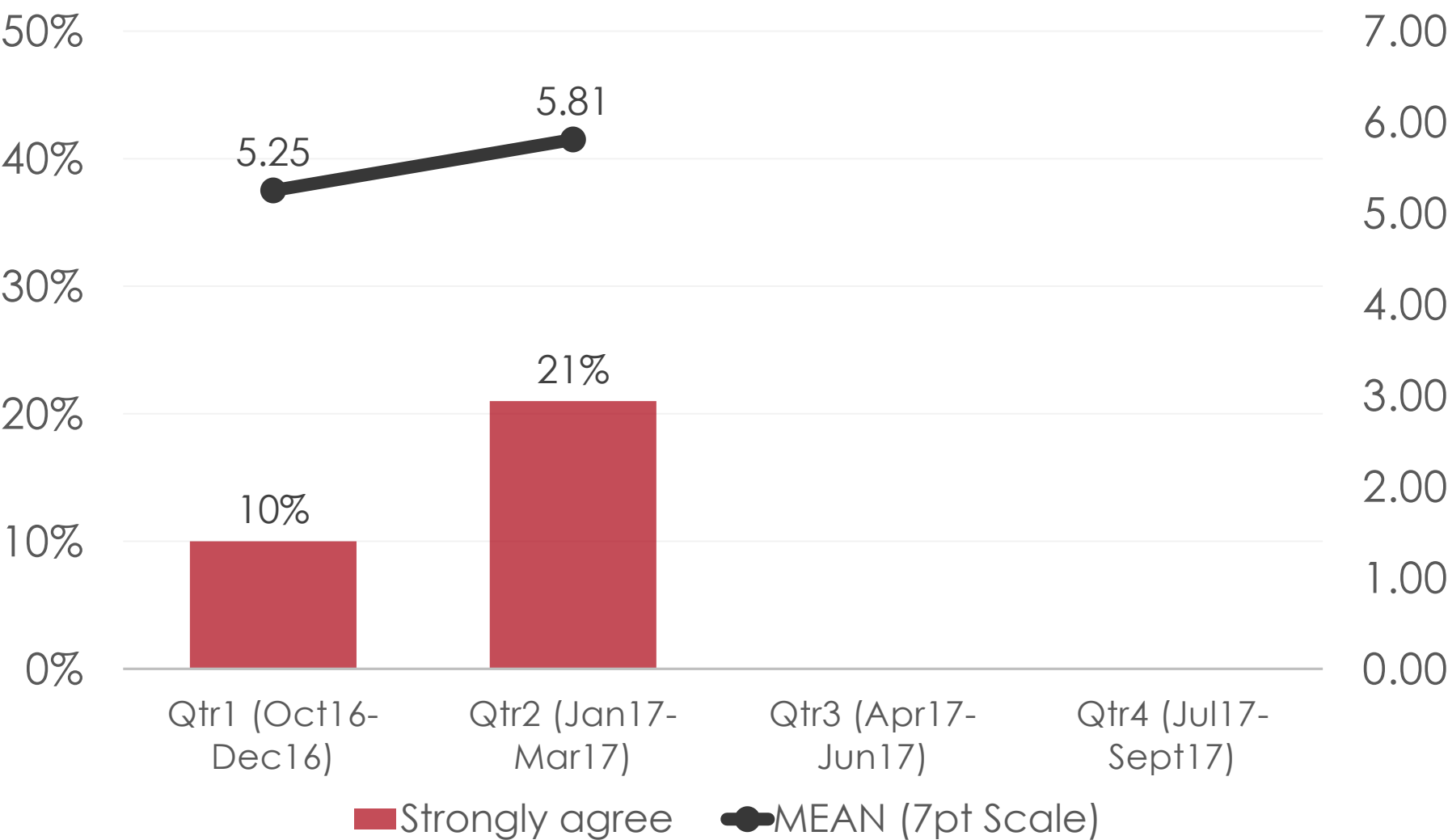
OVERALL SATISFACTION



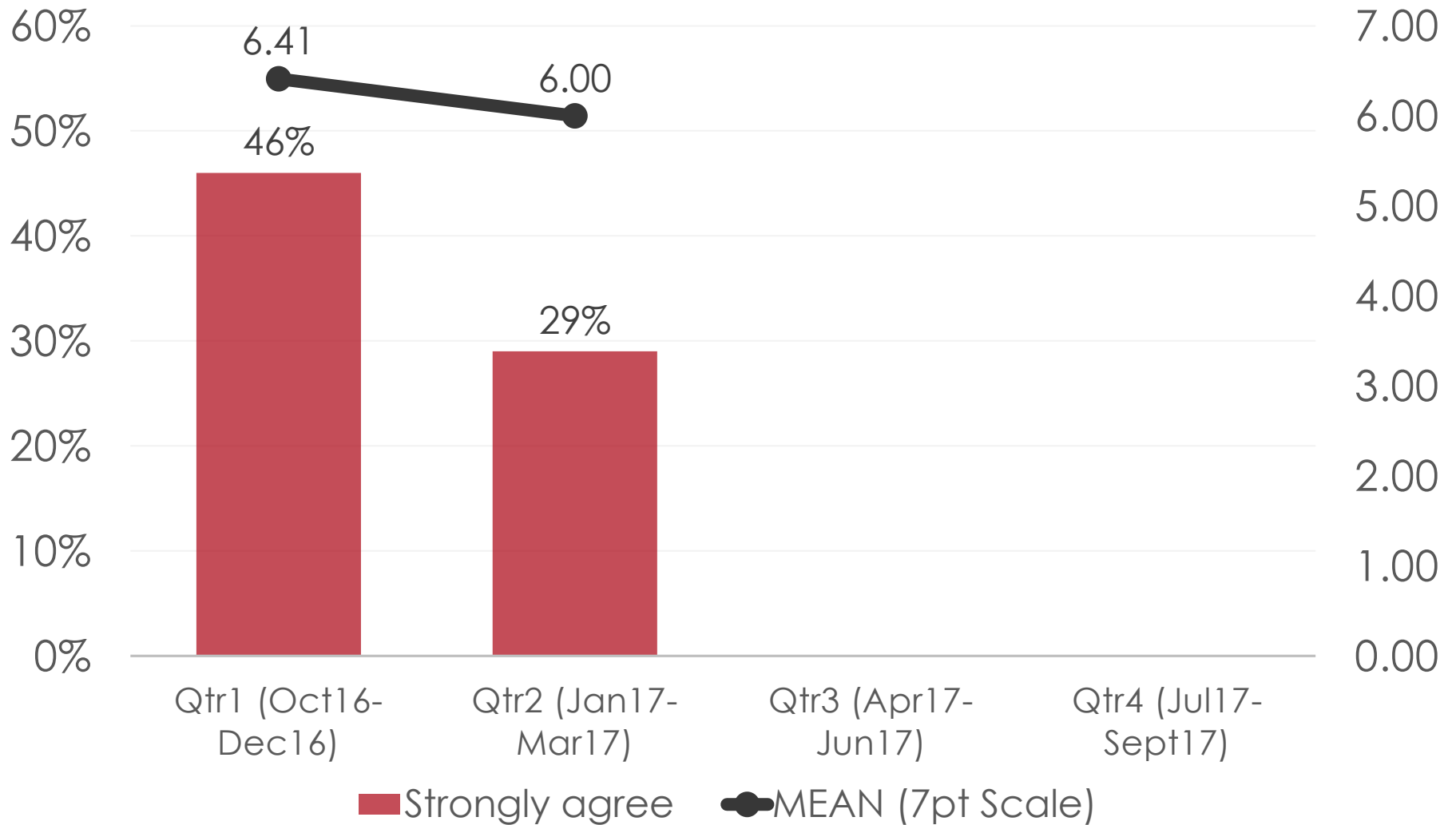
Guam was better than expected



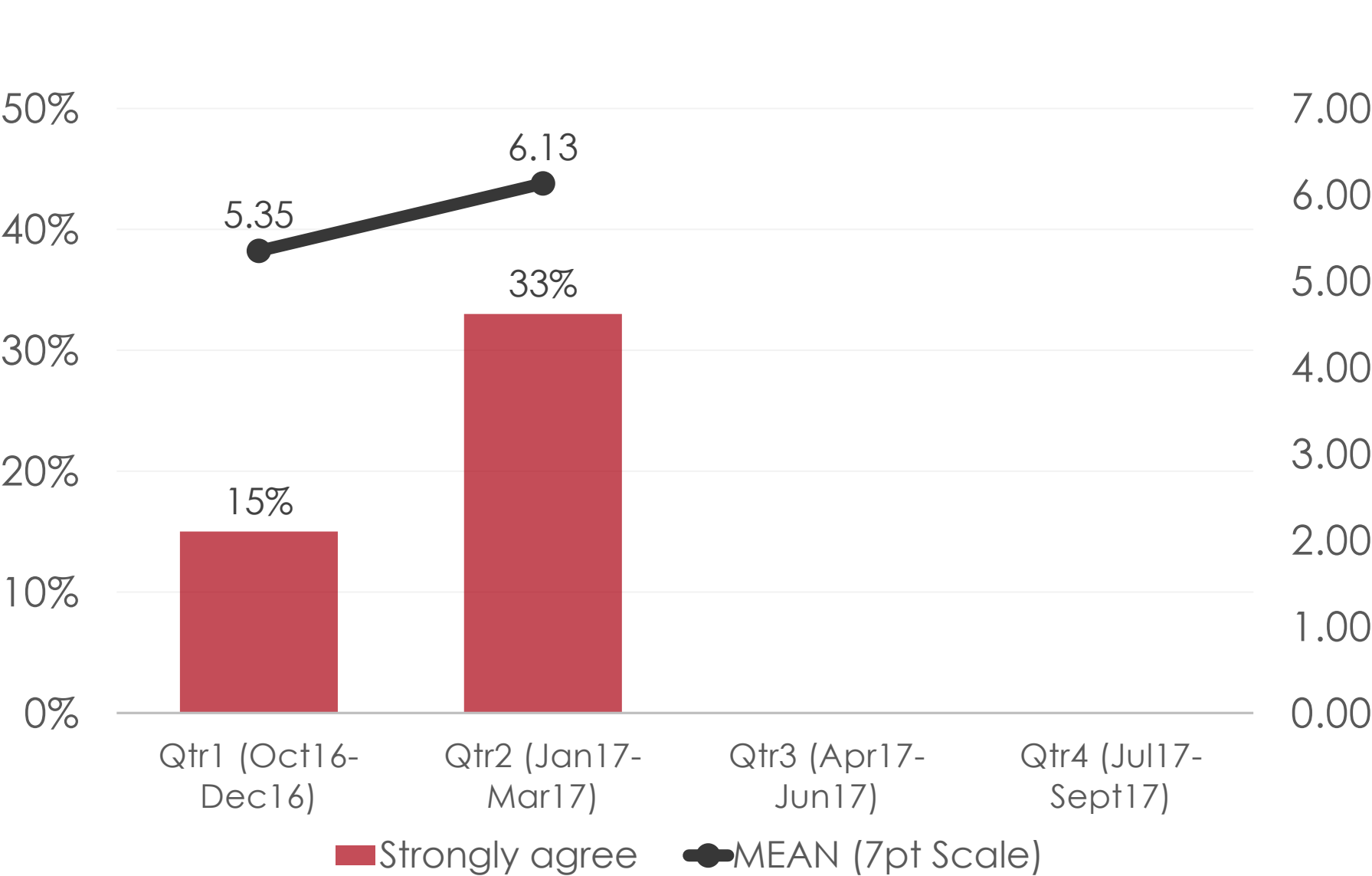
I had no communication problems



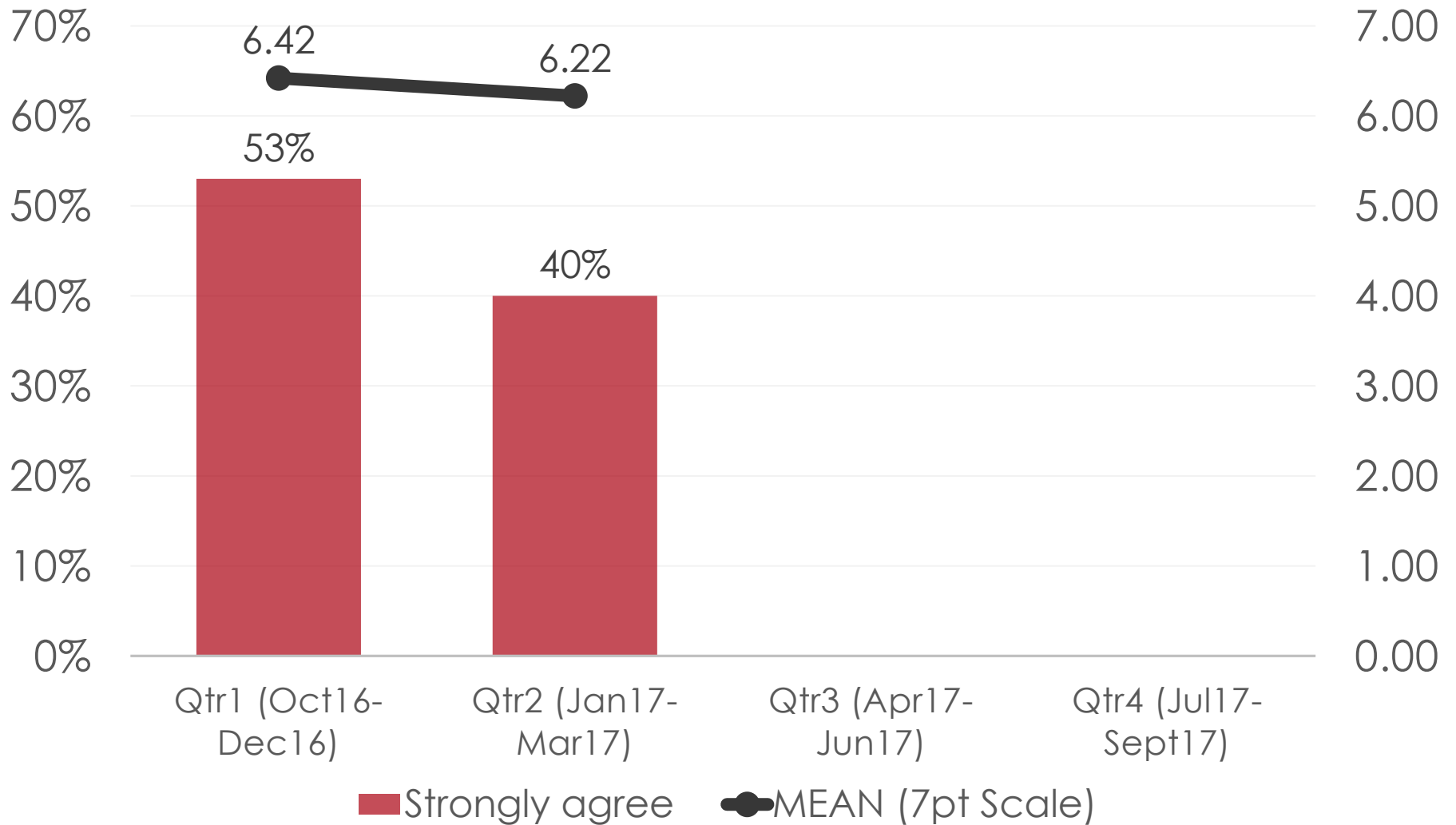
I will recommend Guam to friends



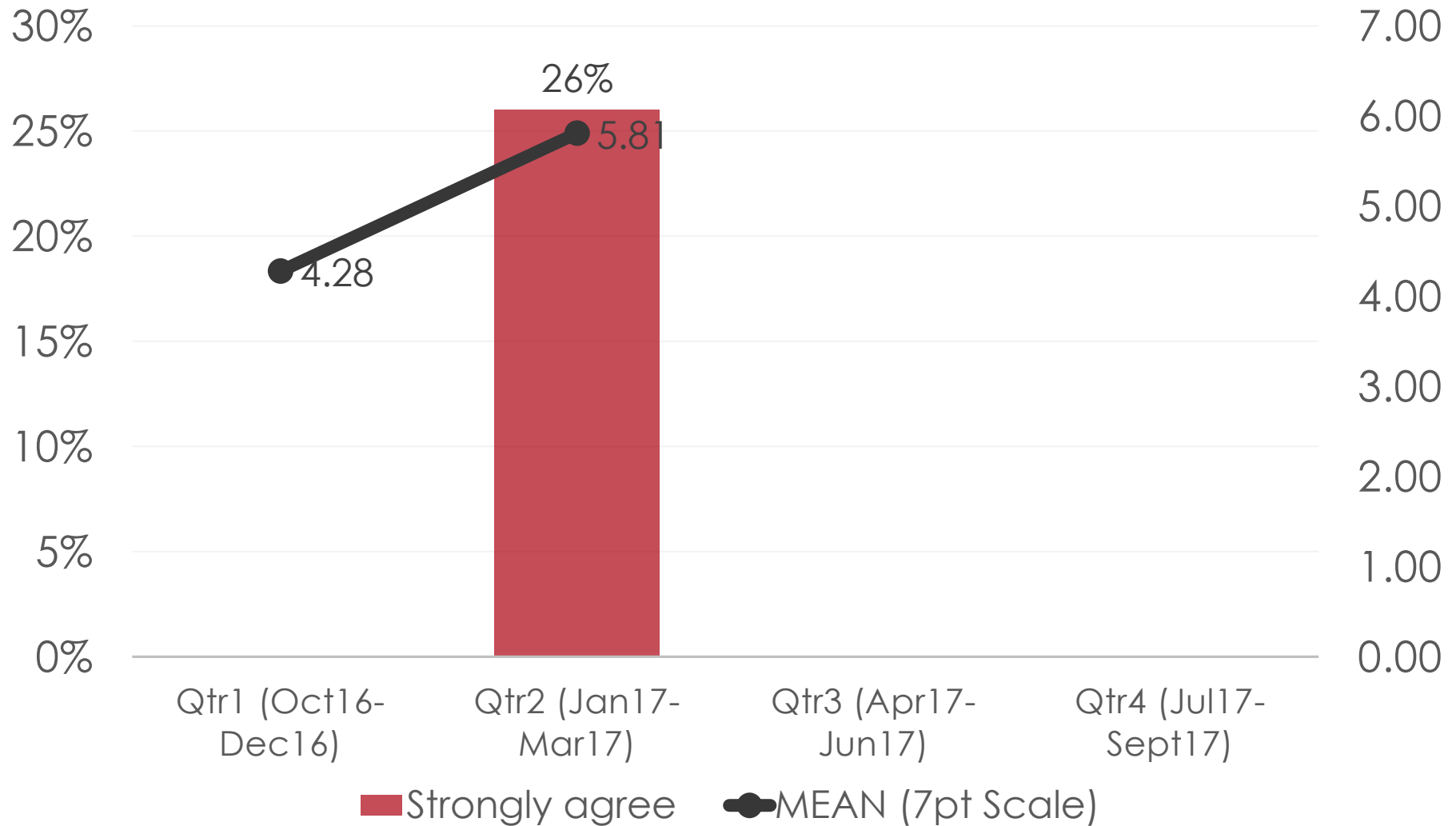
Sites on Guam were attractive



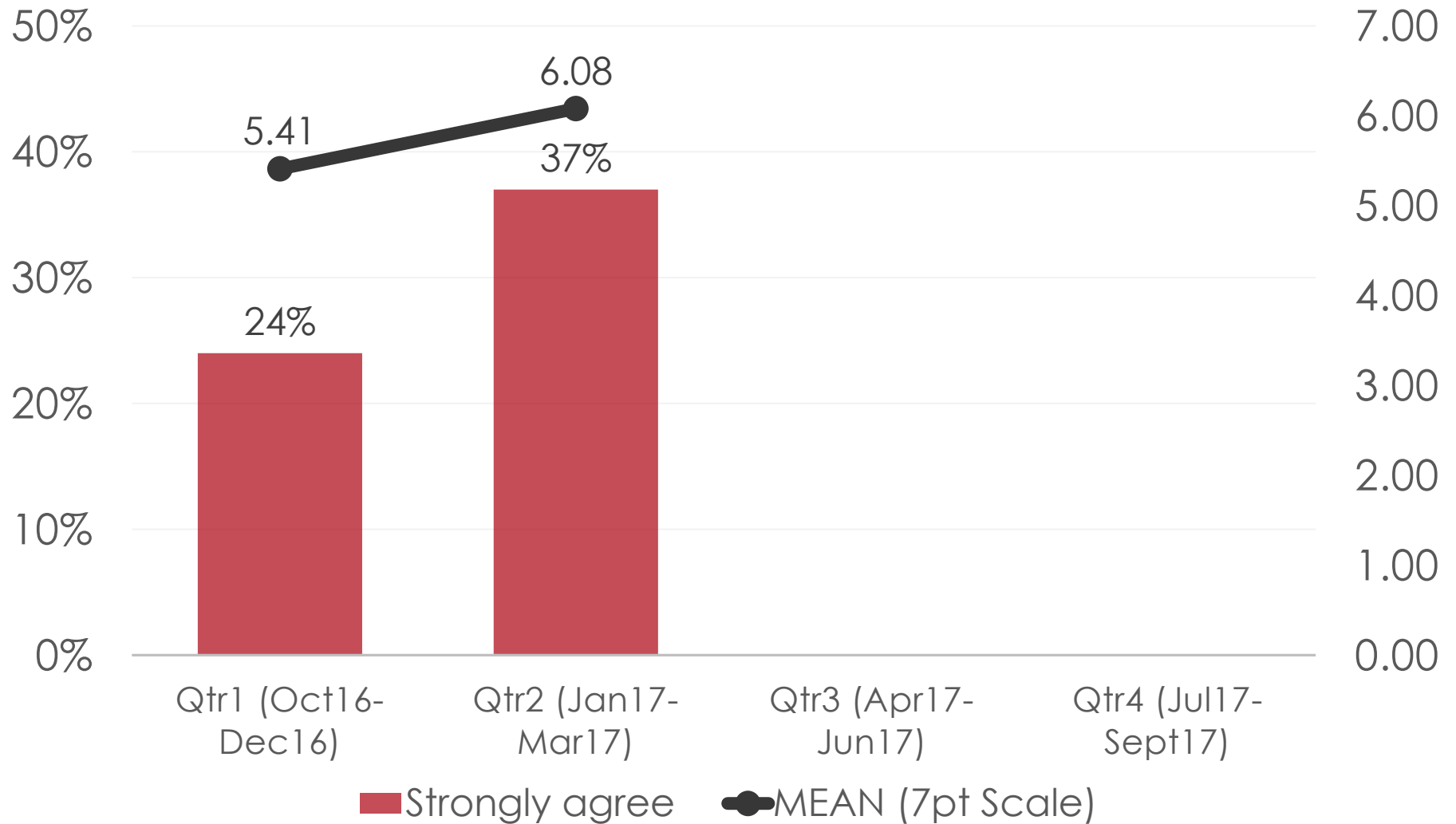
I plan to visit Guam again



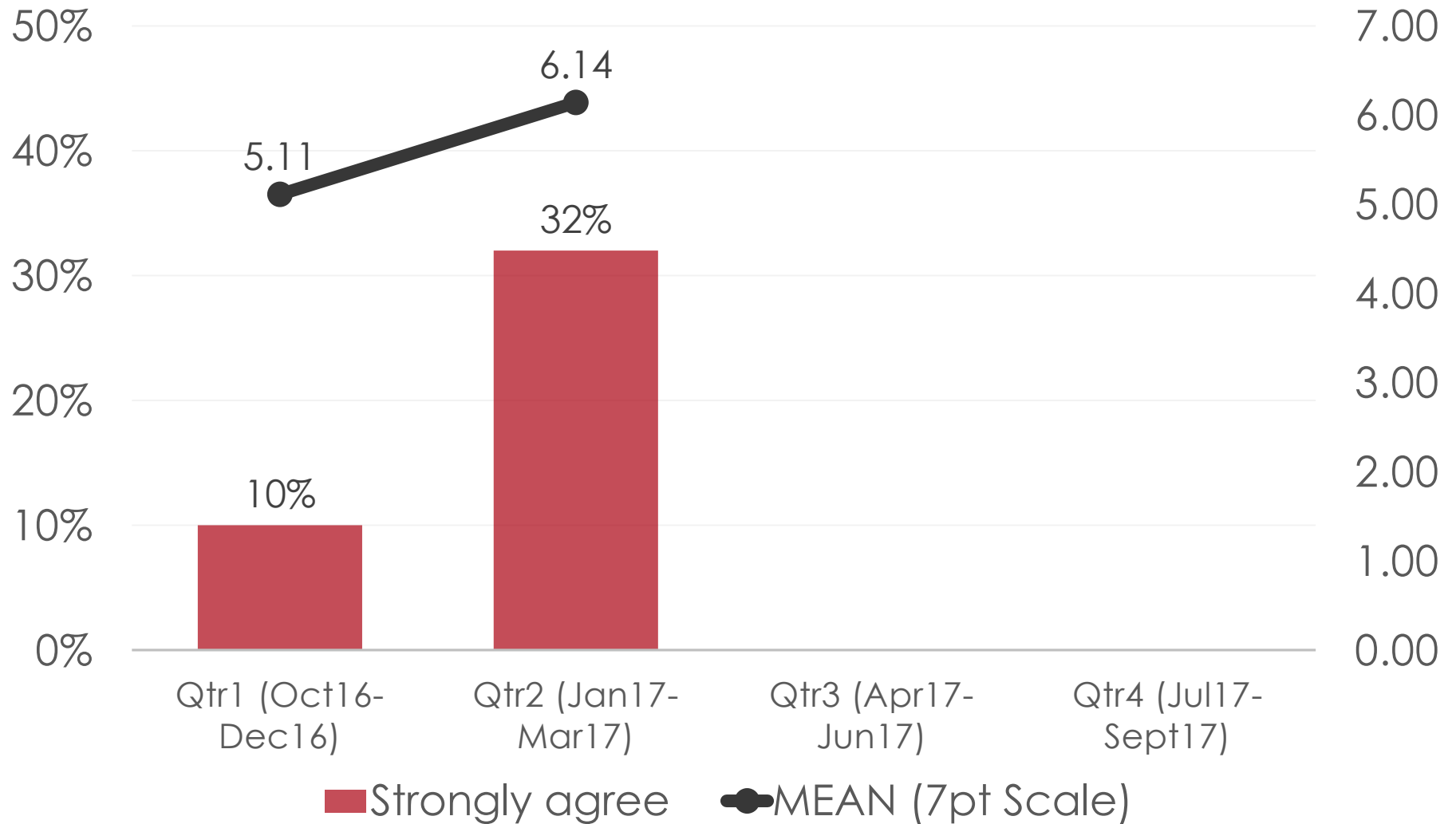
Not enough night time activities



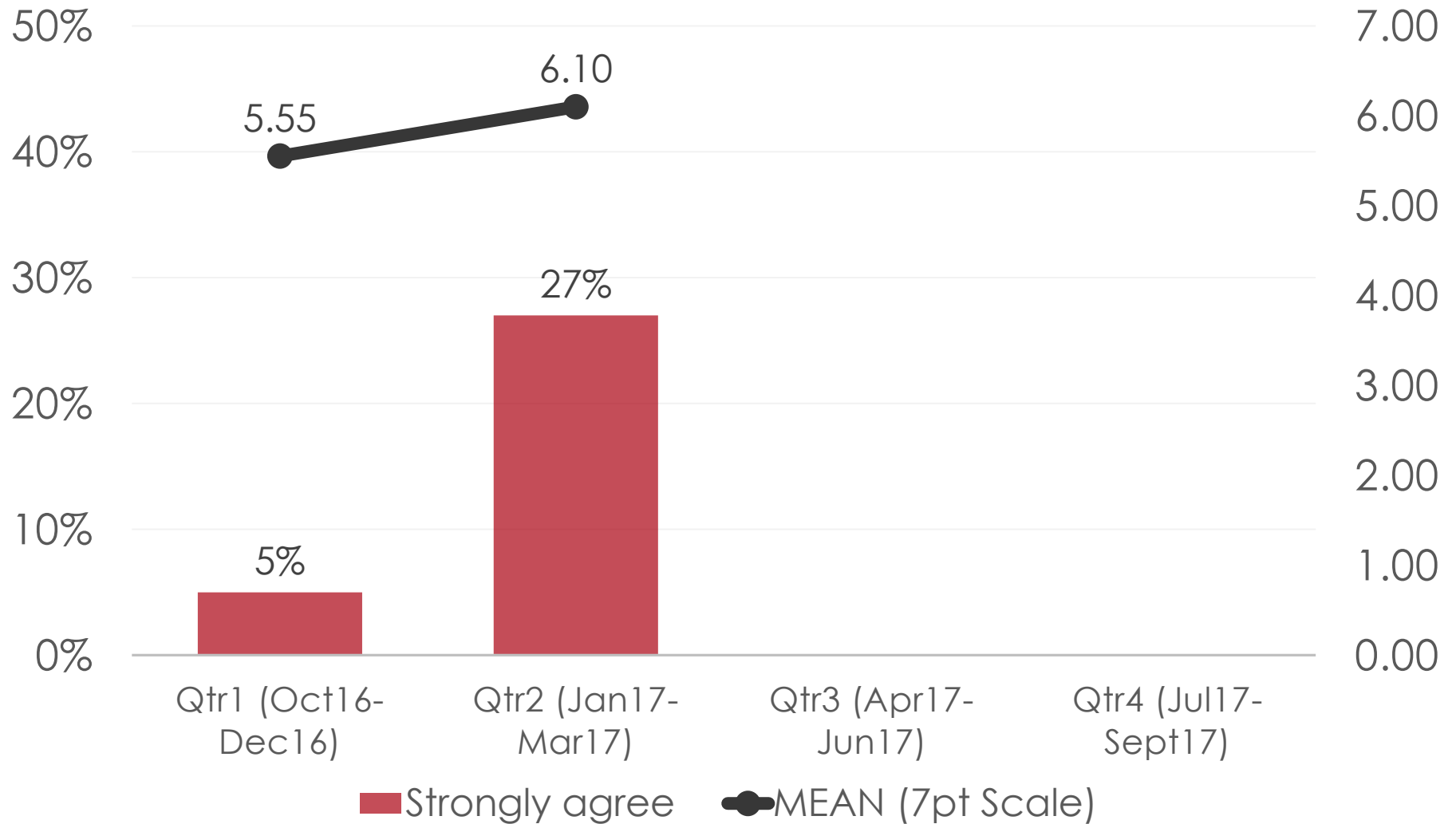
Tour guides were professional



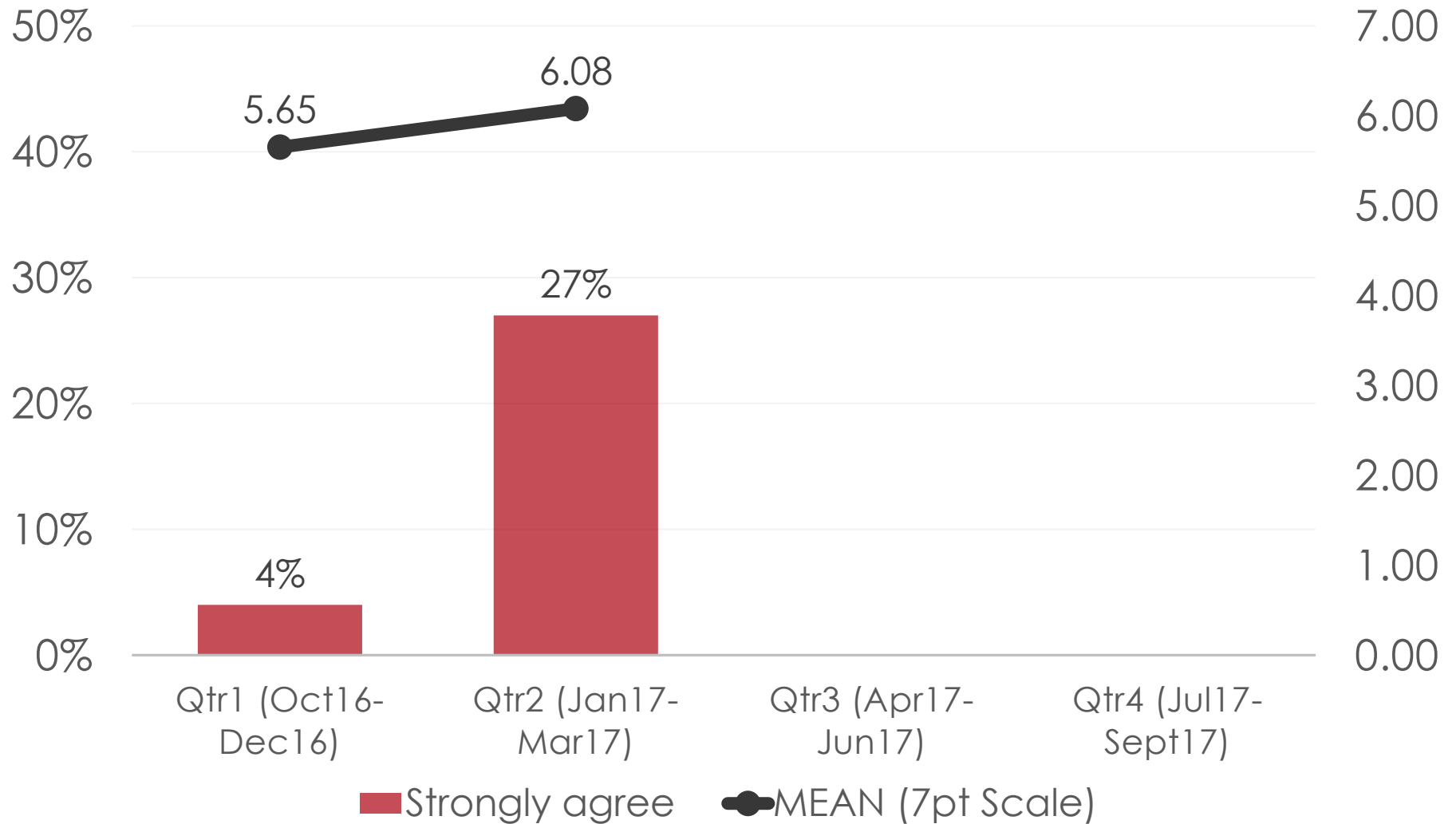
Tour drivers were professional



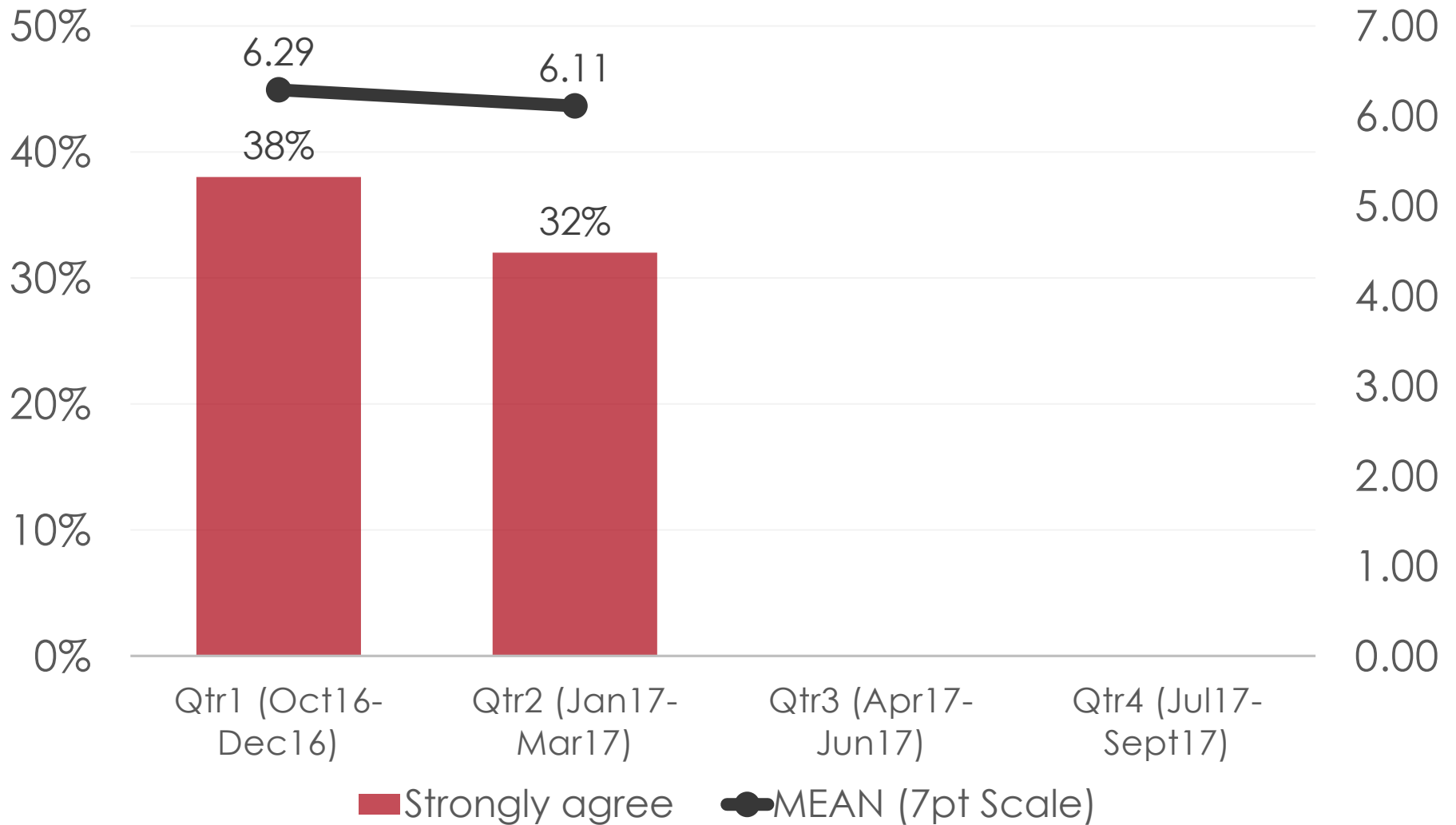
Taxi drivers were professional



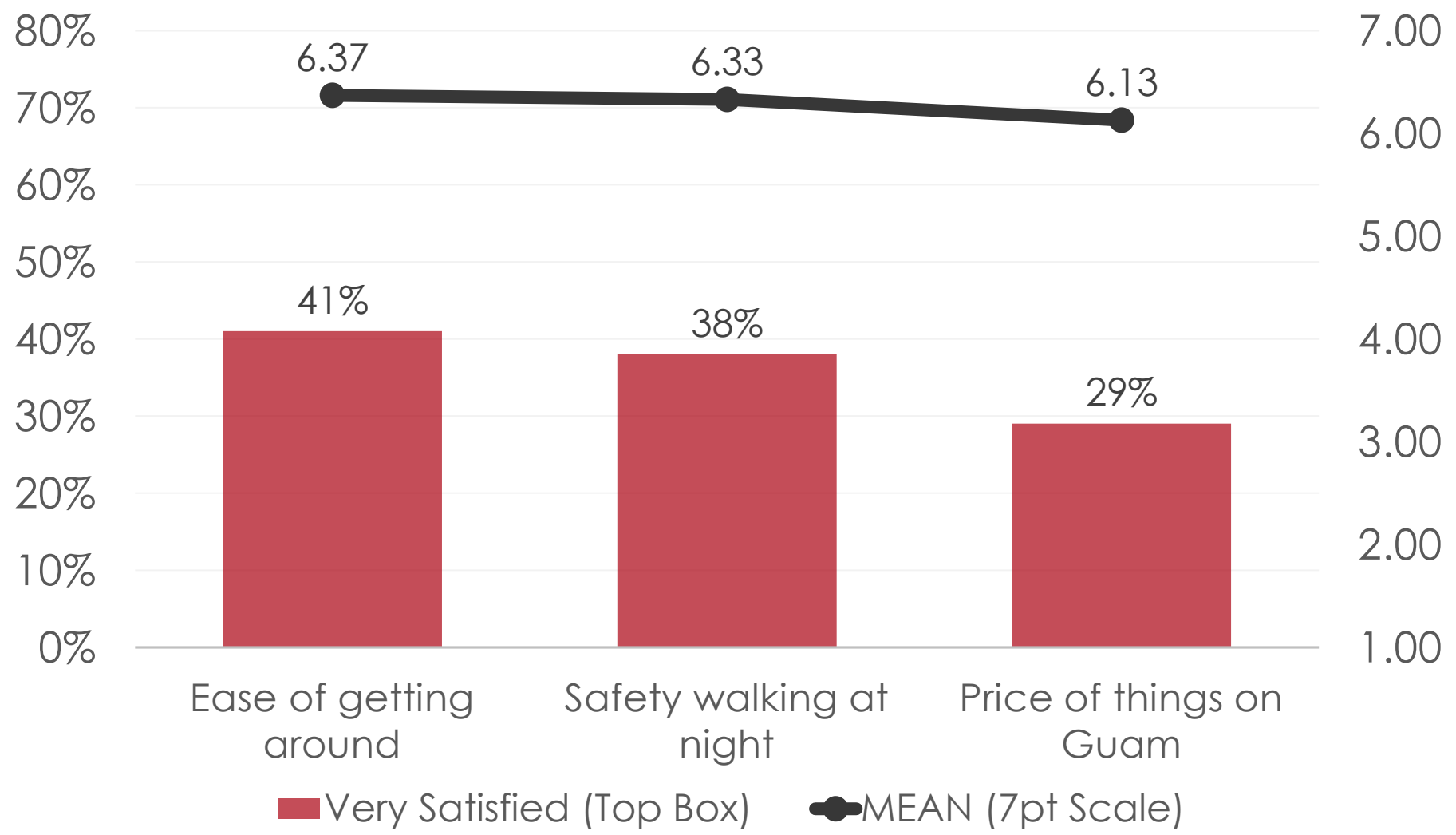
Taxis were clean



Guam airport was clean

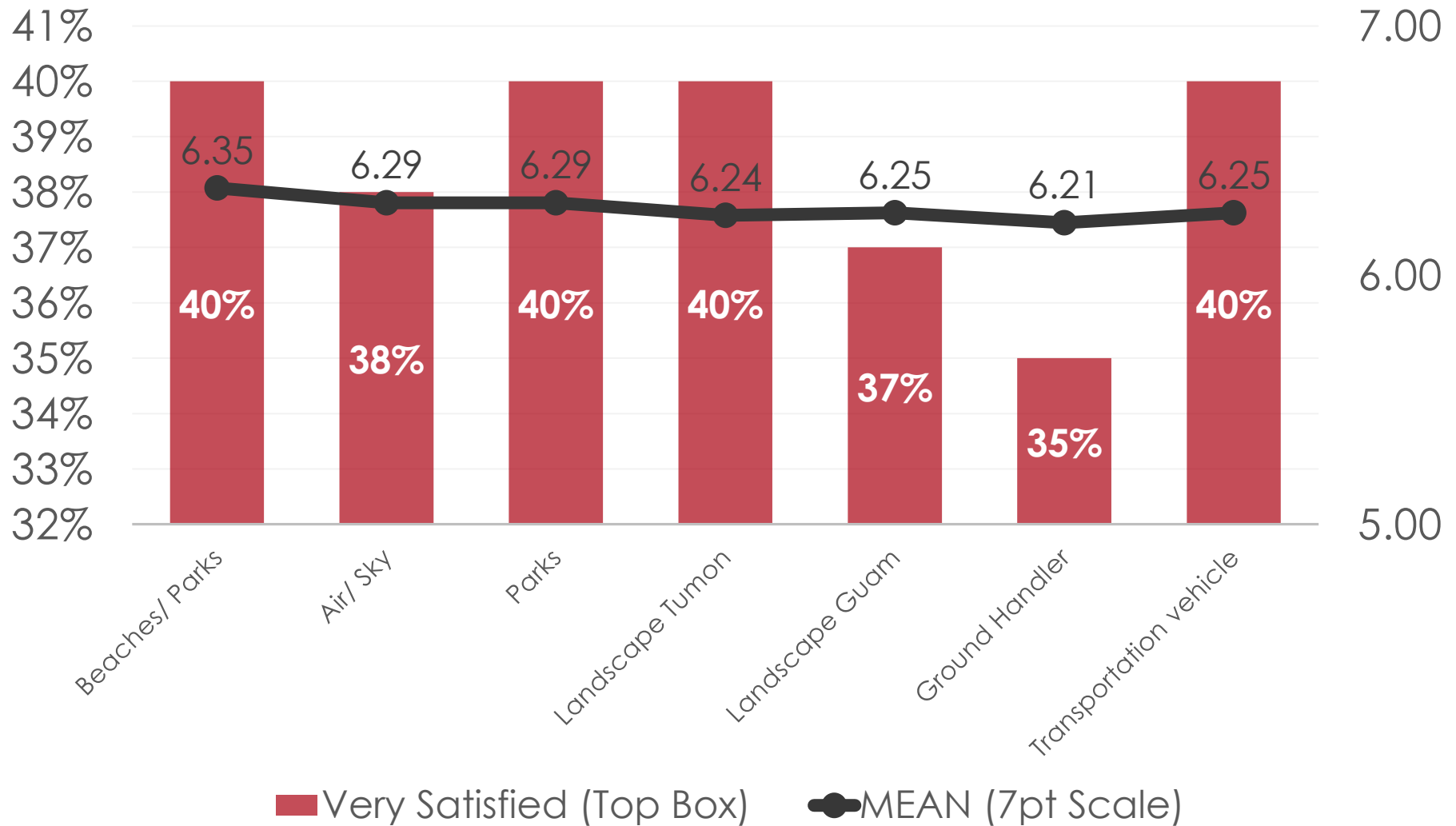


GENERAL SATISFACTION

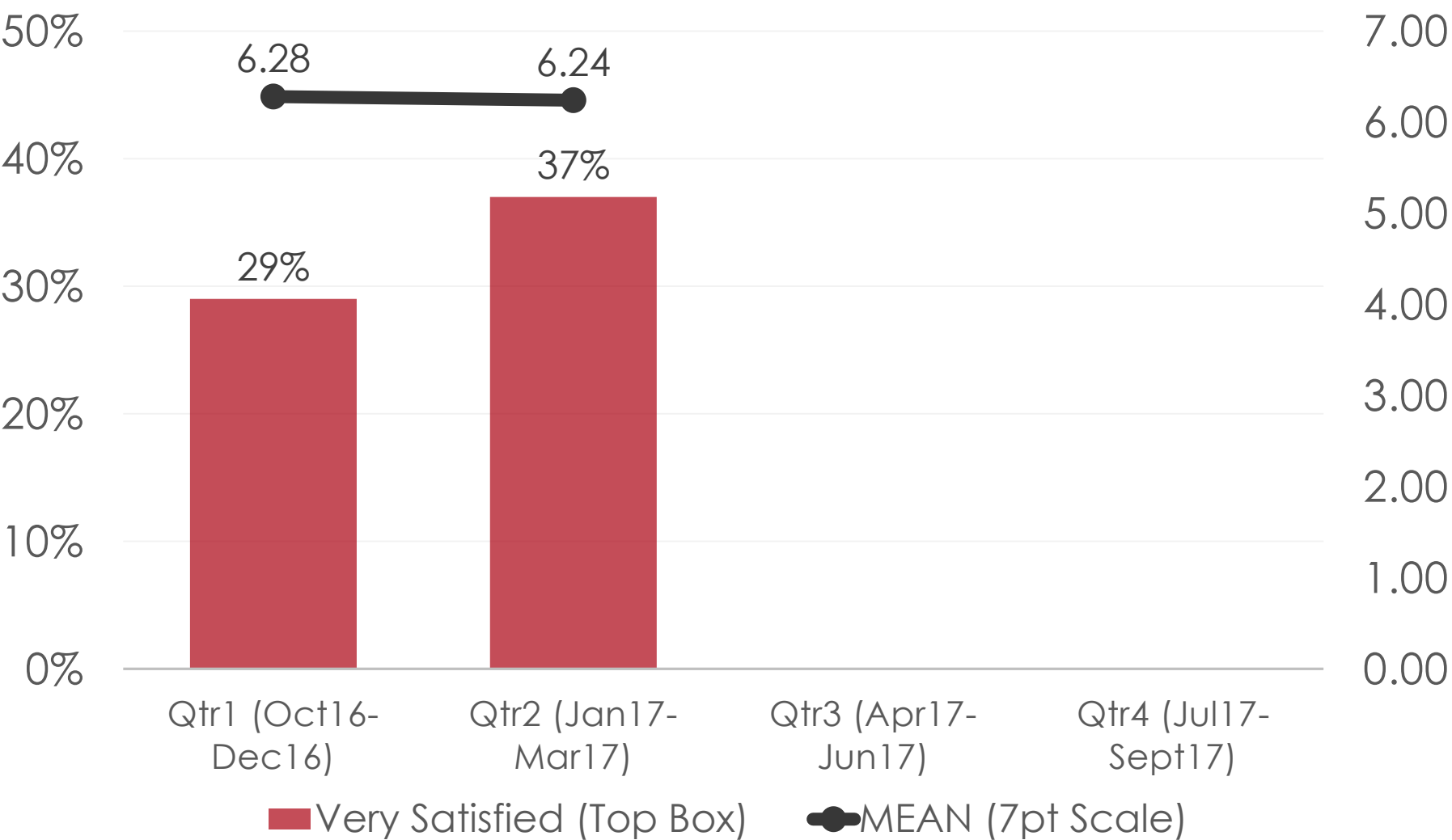


GENERAL SATISFACTION –

Quality/ Cleanliness

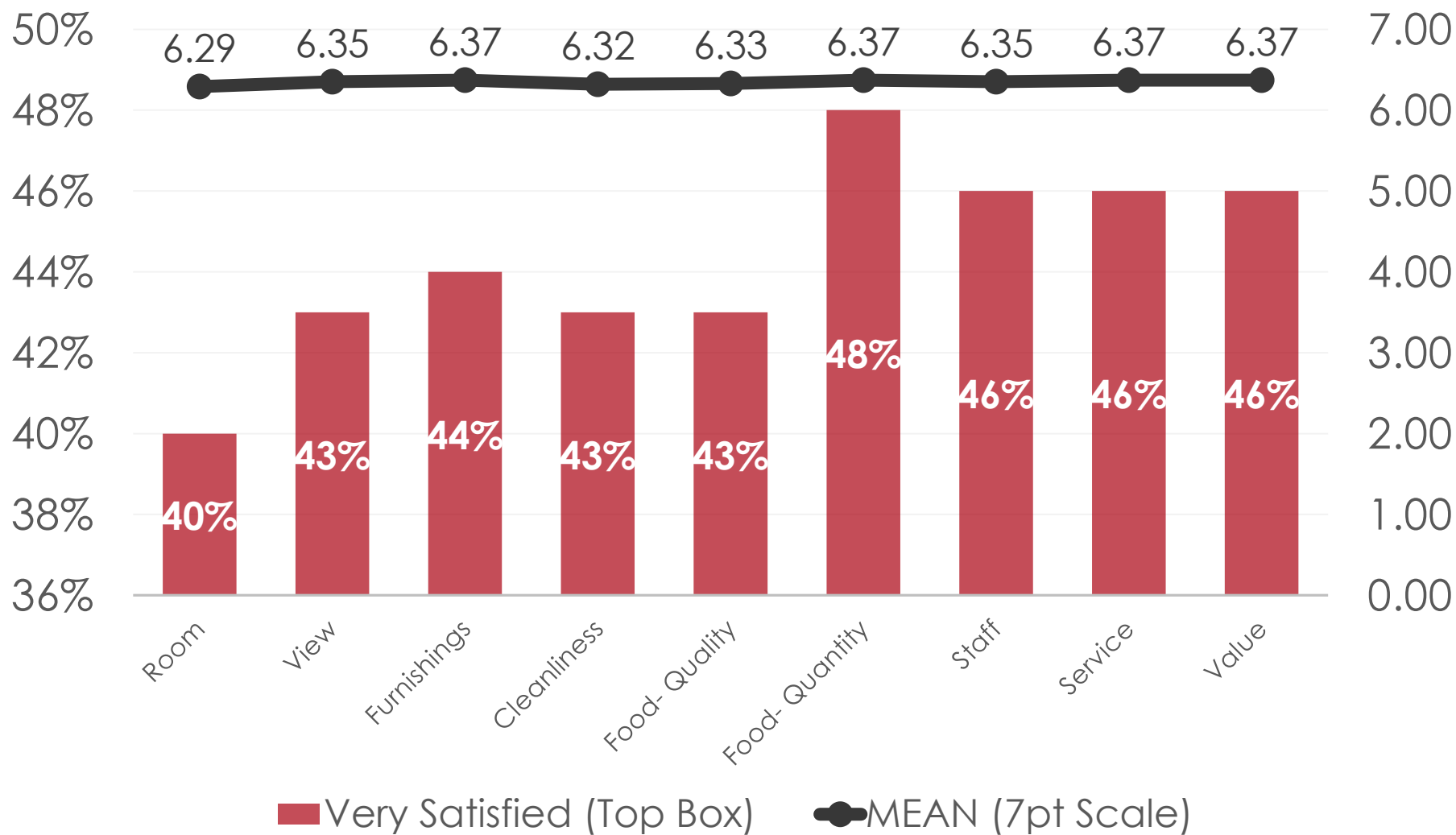


ACCOMMODATIONS – OVERALL SATISFACTION

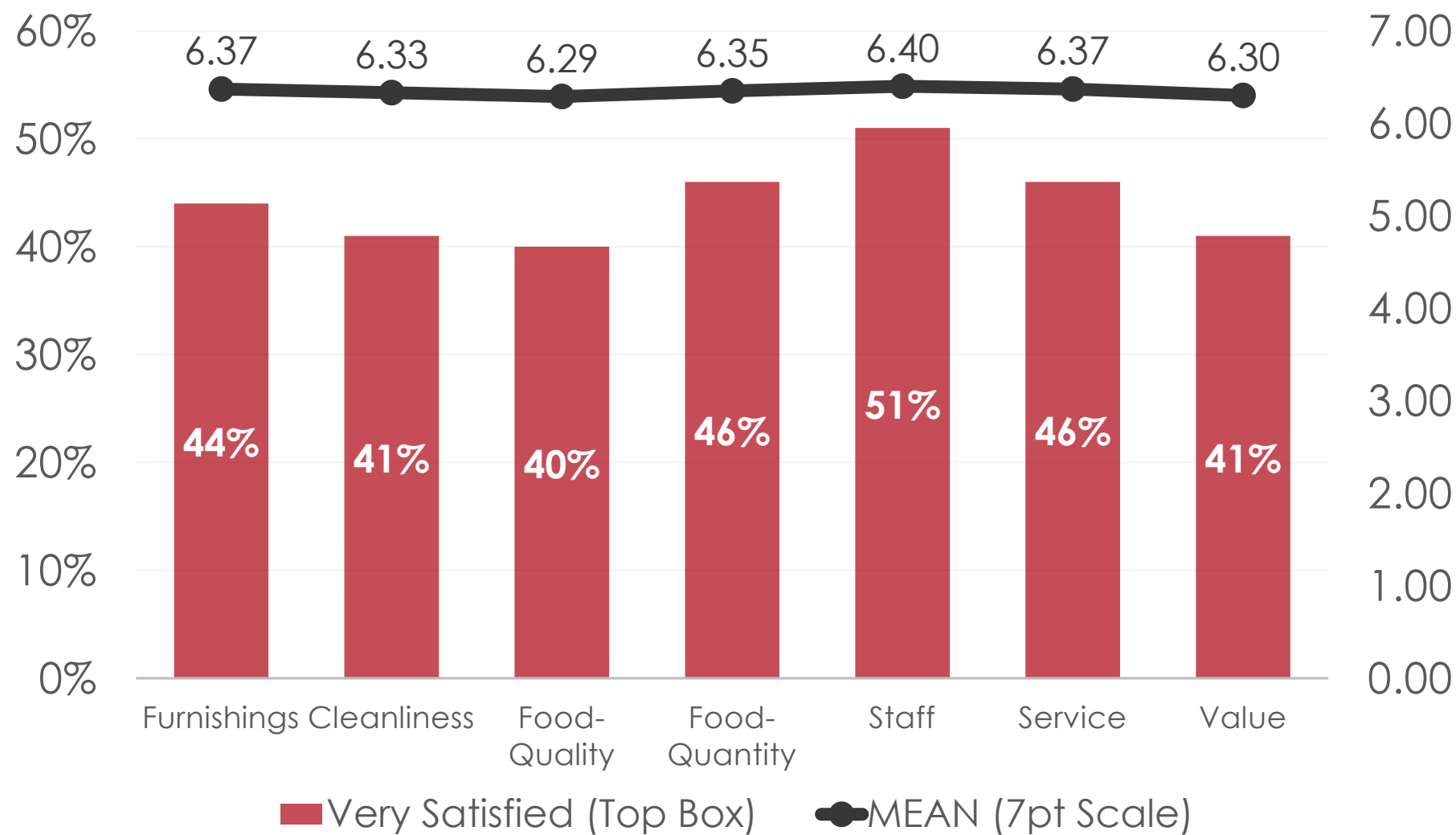


ACCOMMODATIONS –

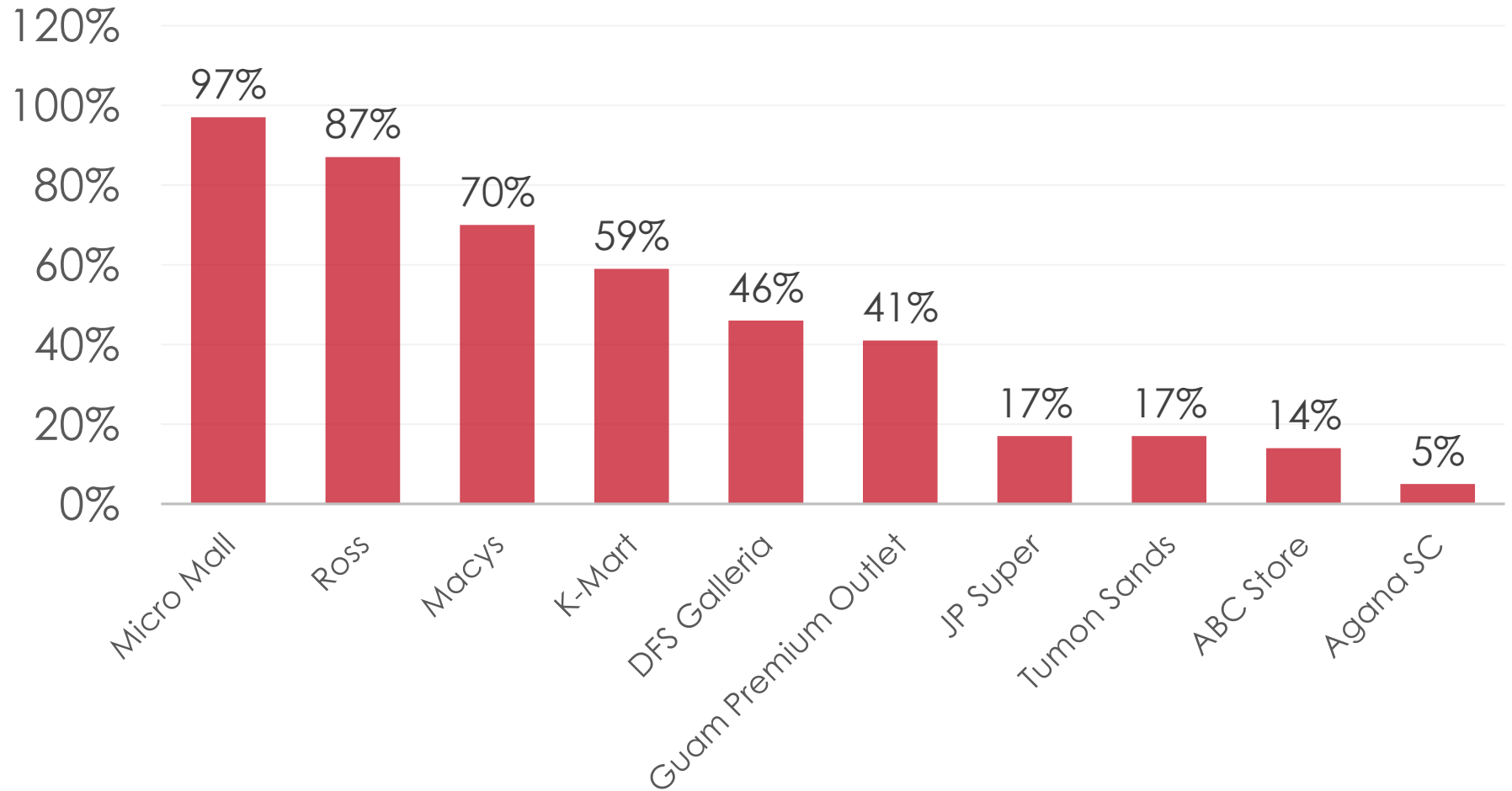
Satisfaction by Category



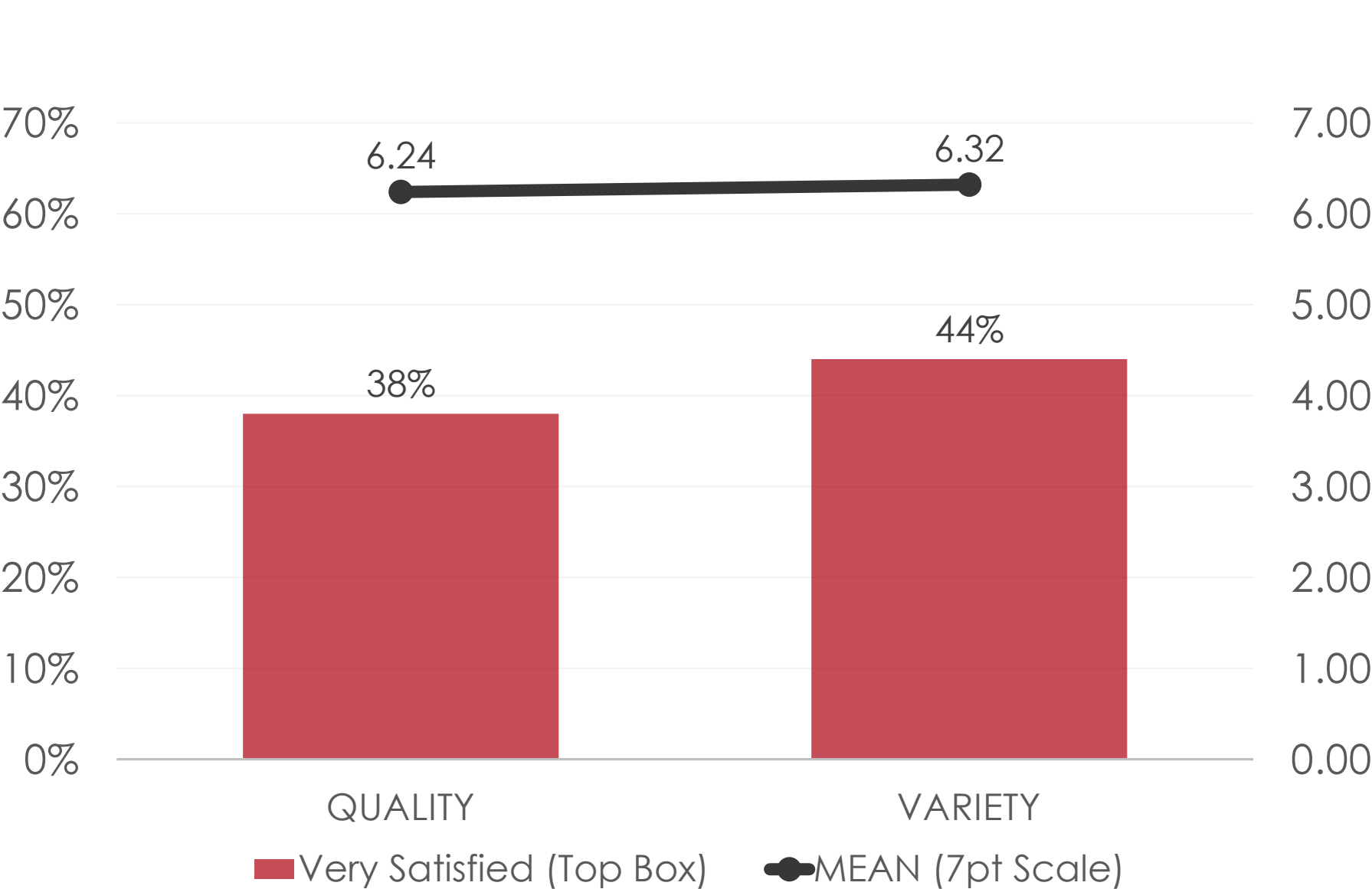
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



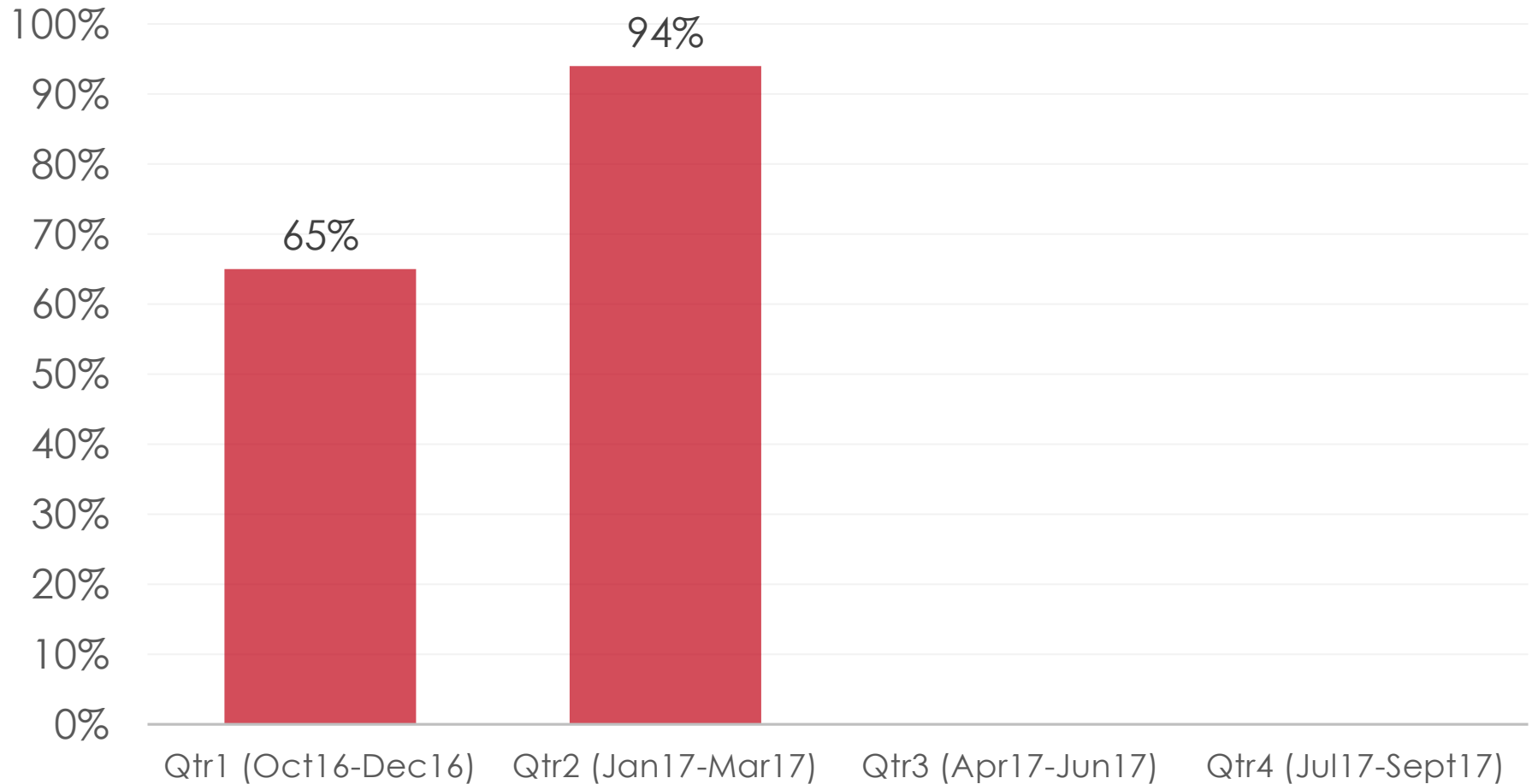
Shopping Malls/ Stores (Top Responses)



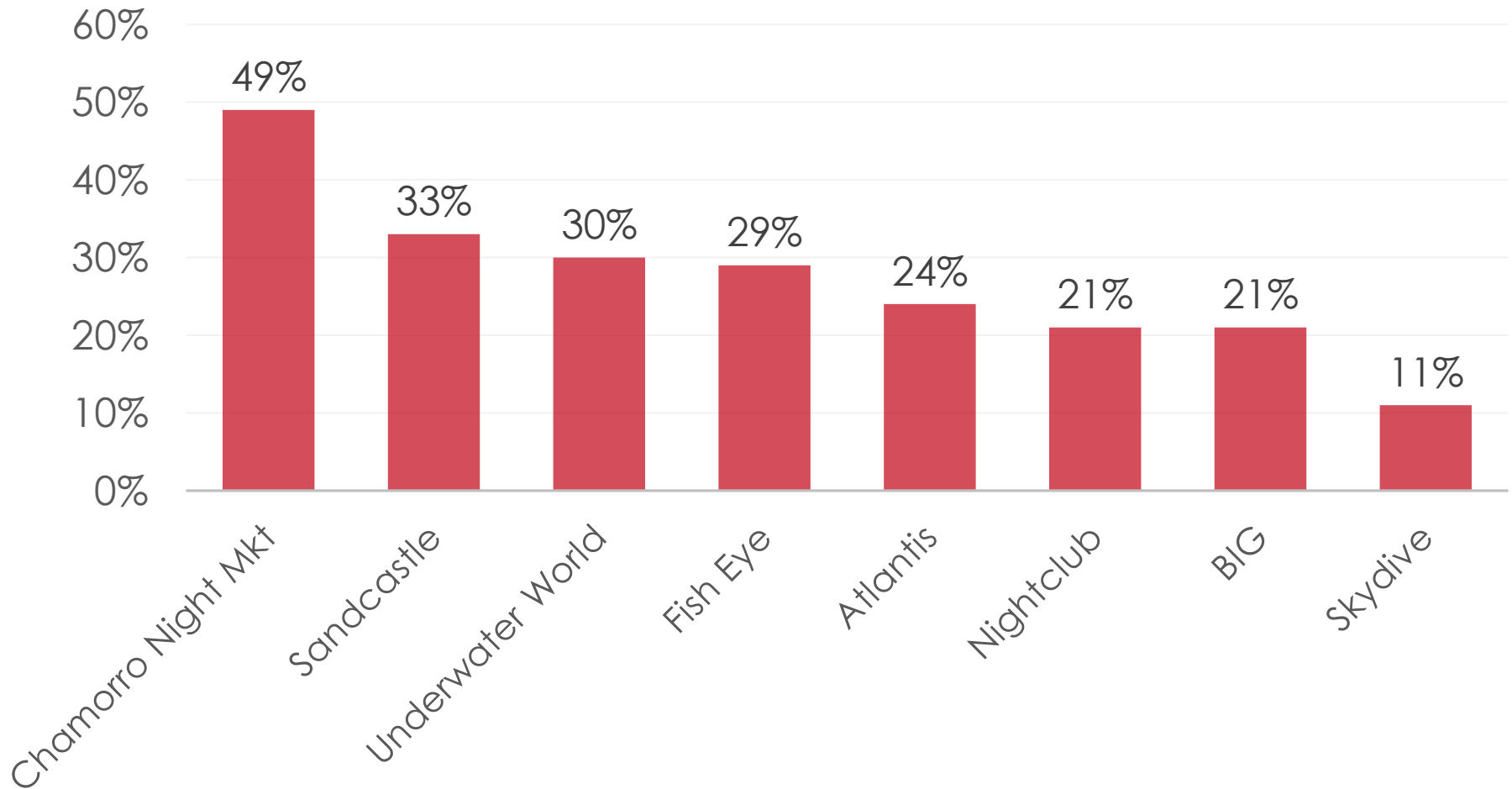
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

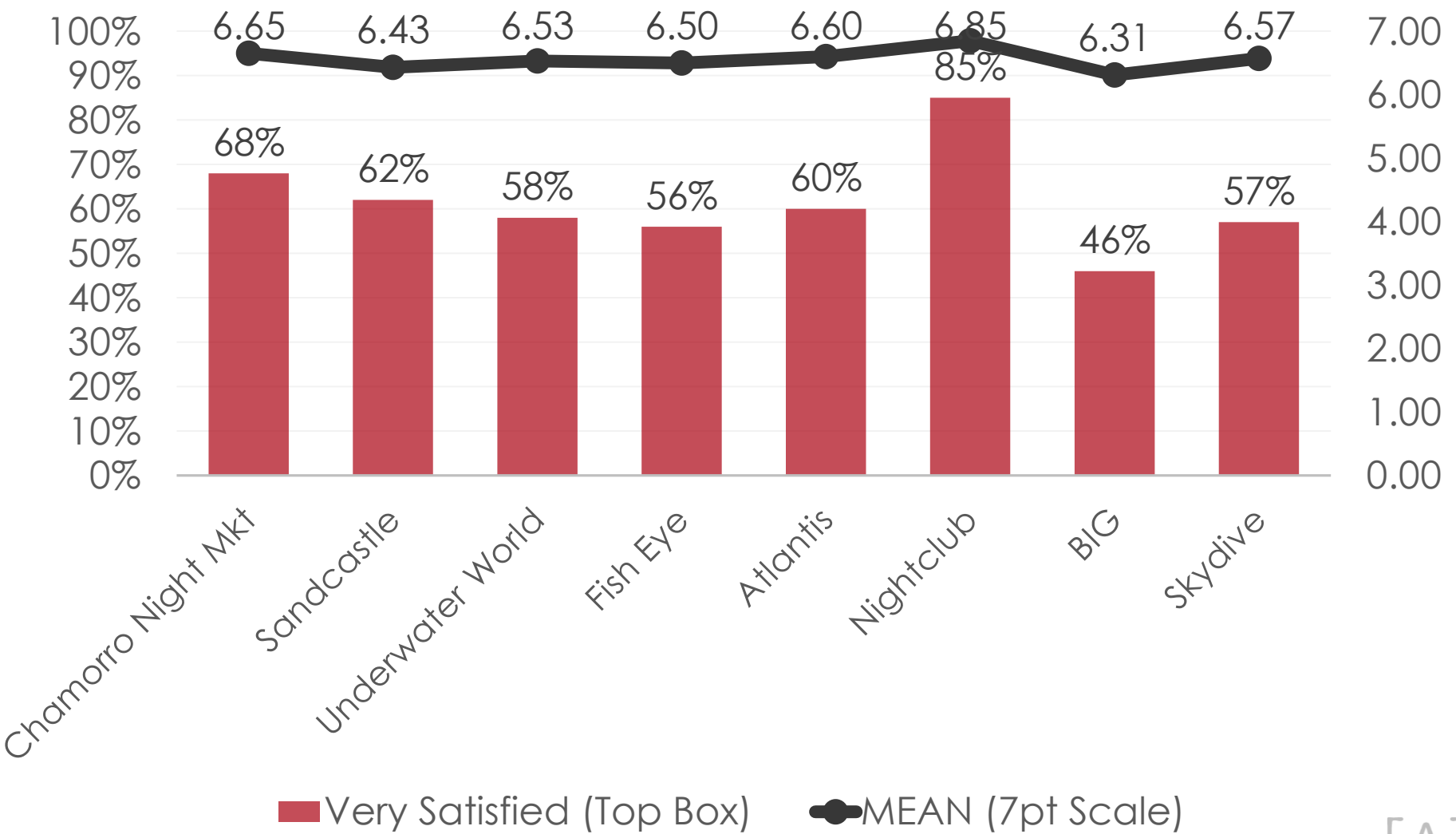


Optional Tour Participation (Top Responses)

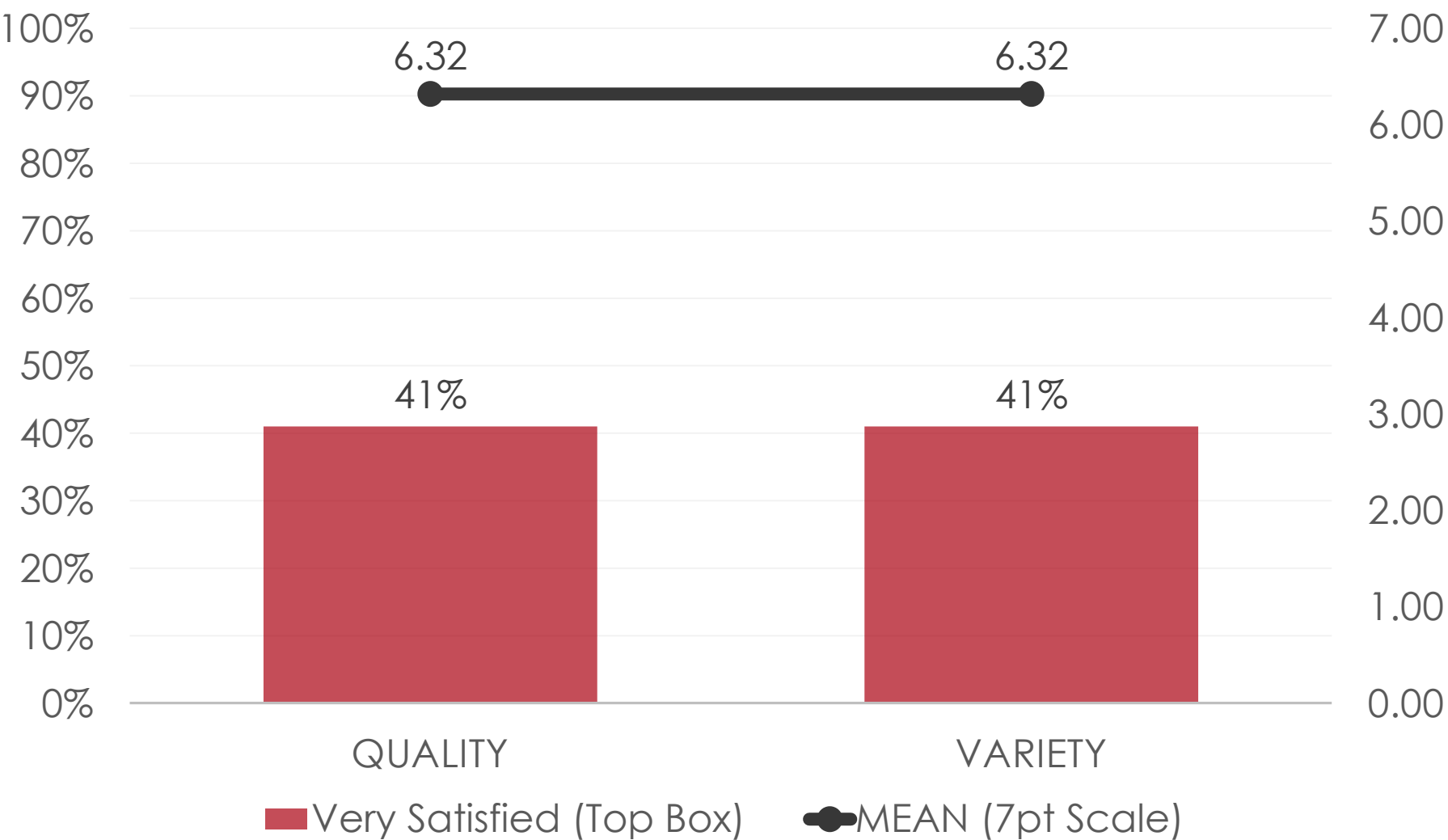


Optional Tour Satisfaction

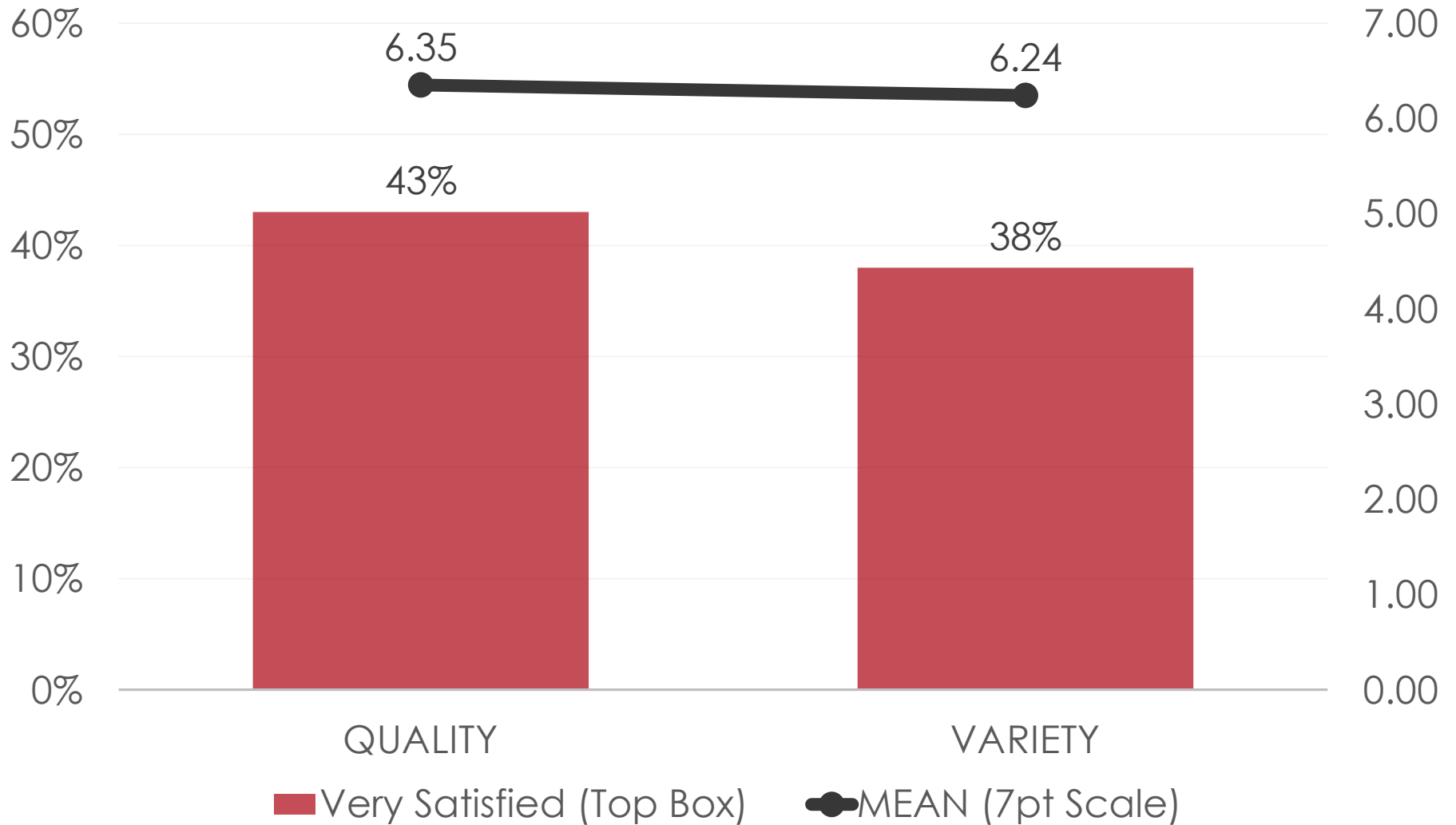
Top Responses only - Participation (10%+)



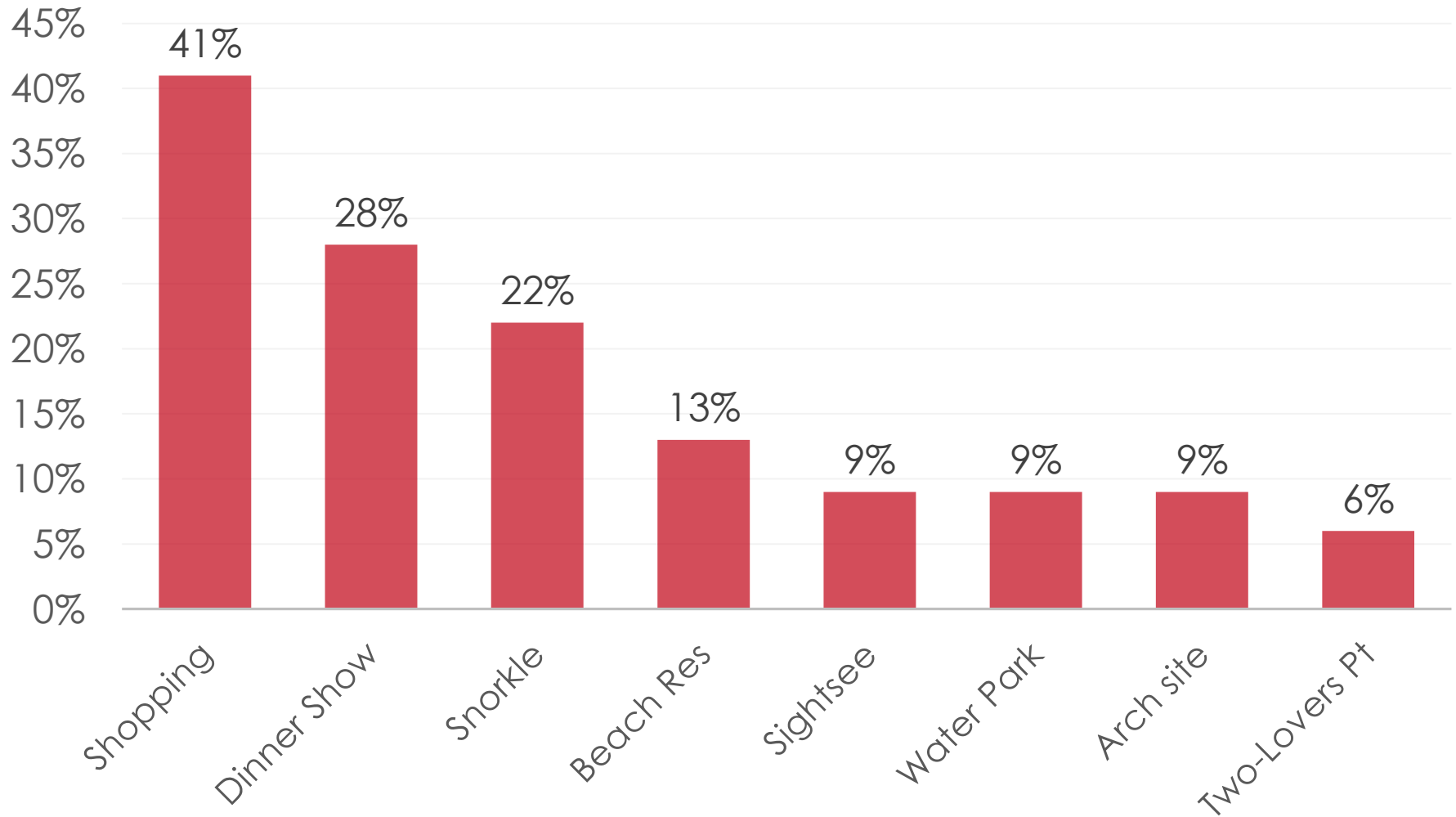
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION



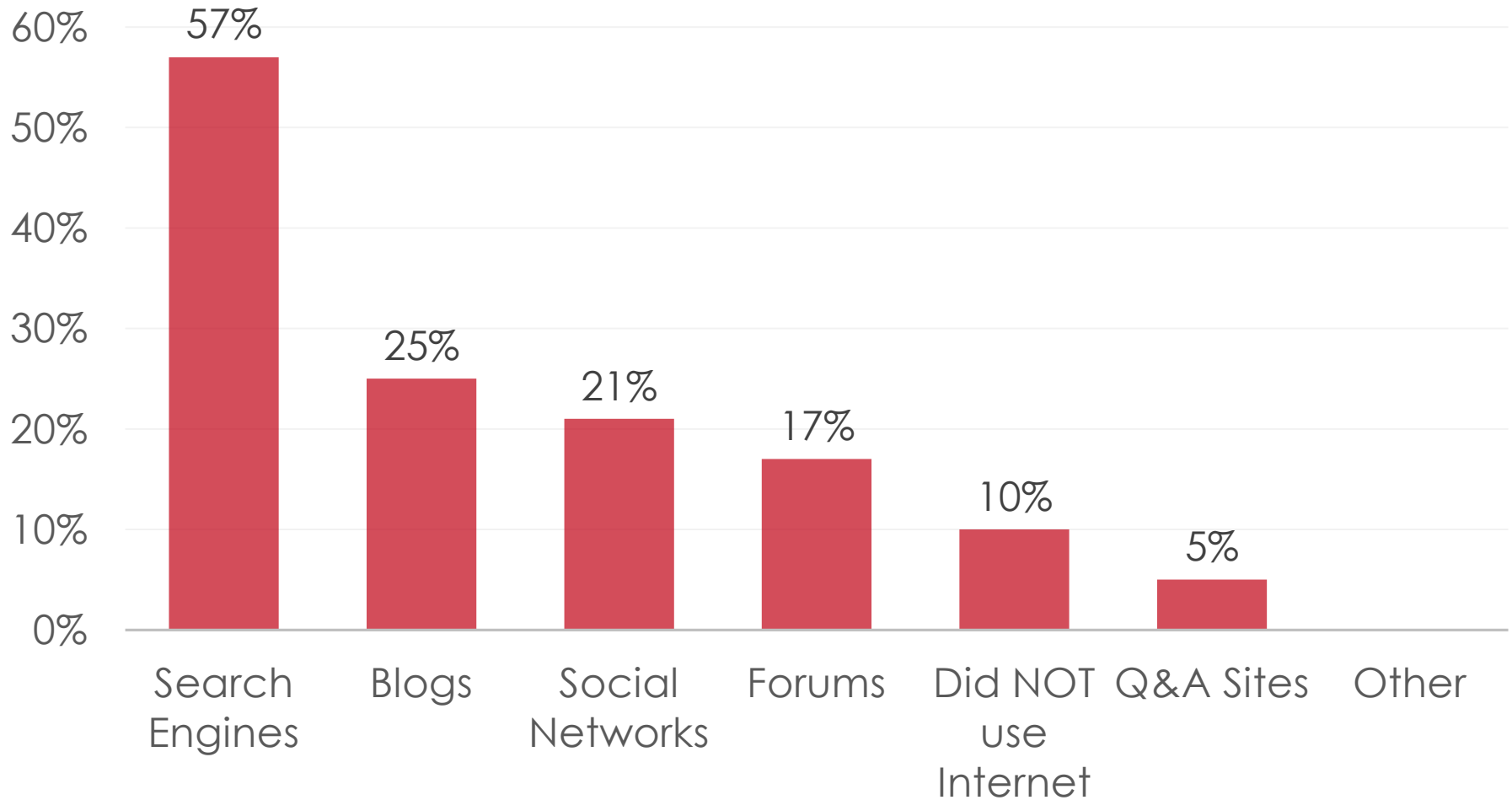
Activities Participation (Top Responses)



SECTION 5

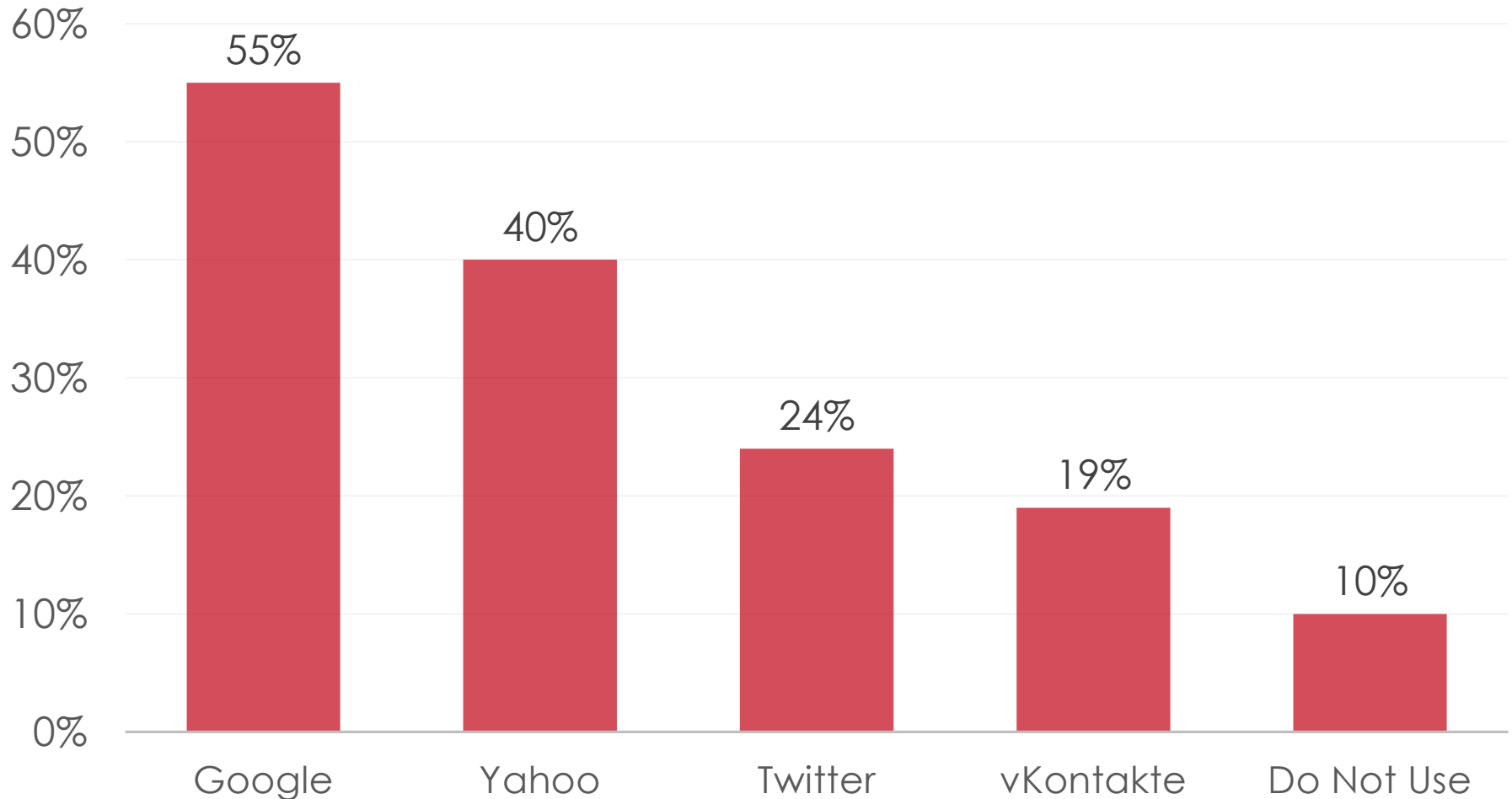
PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



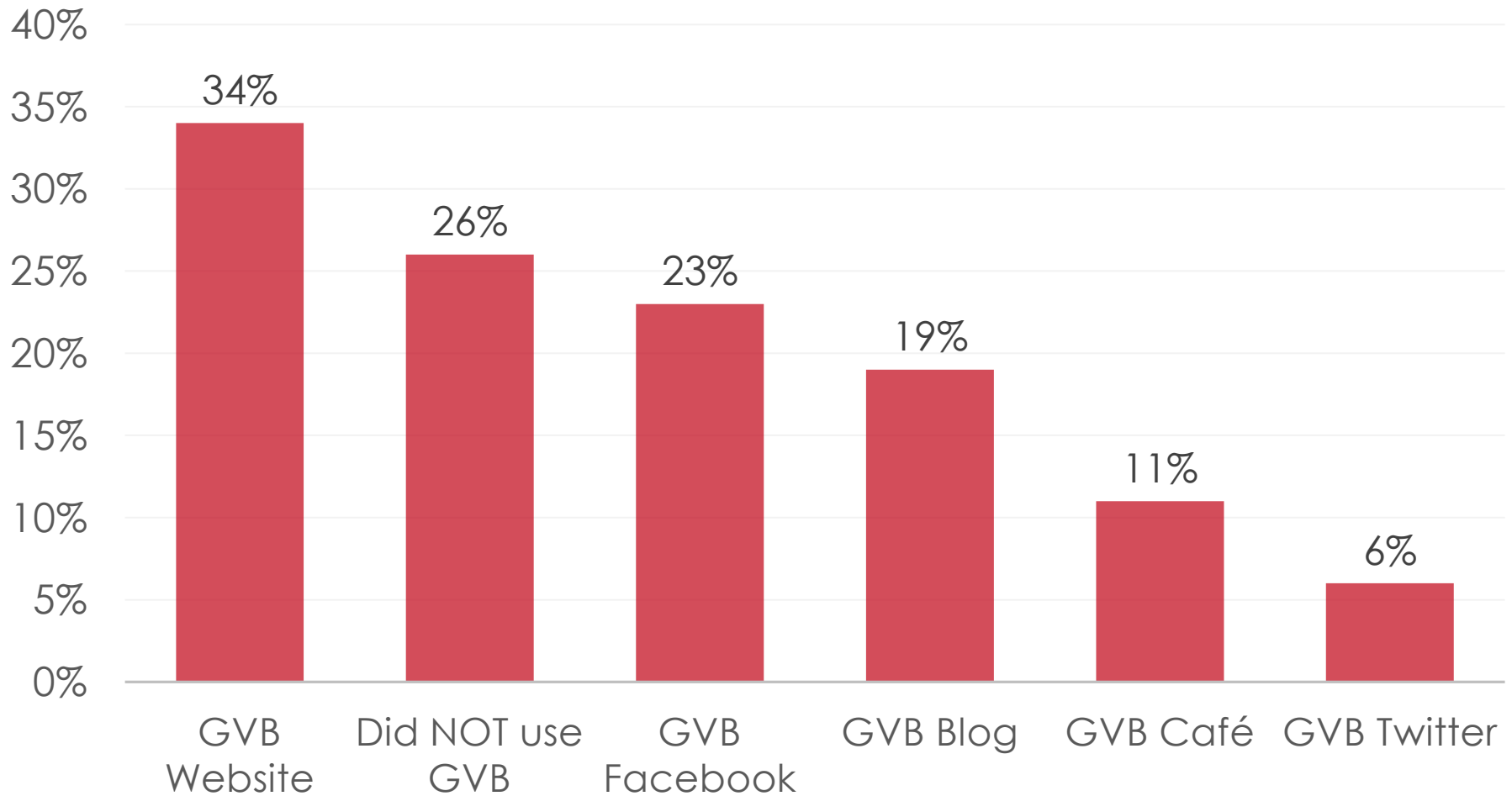
INTERNET- SOURCES OF INFORMATION

Things to do on Guam

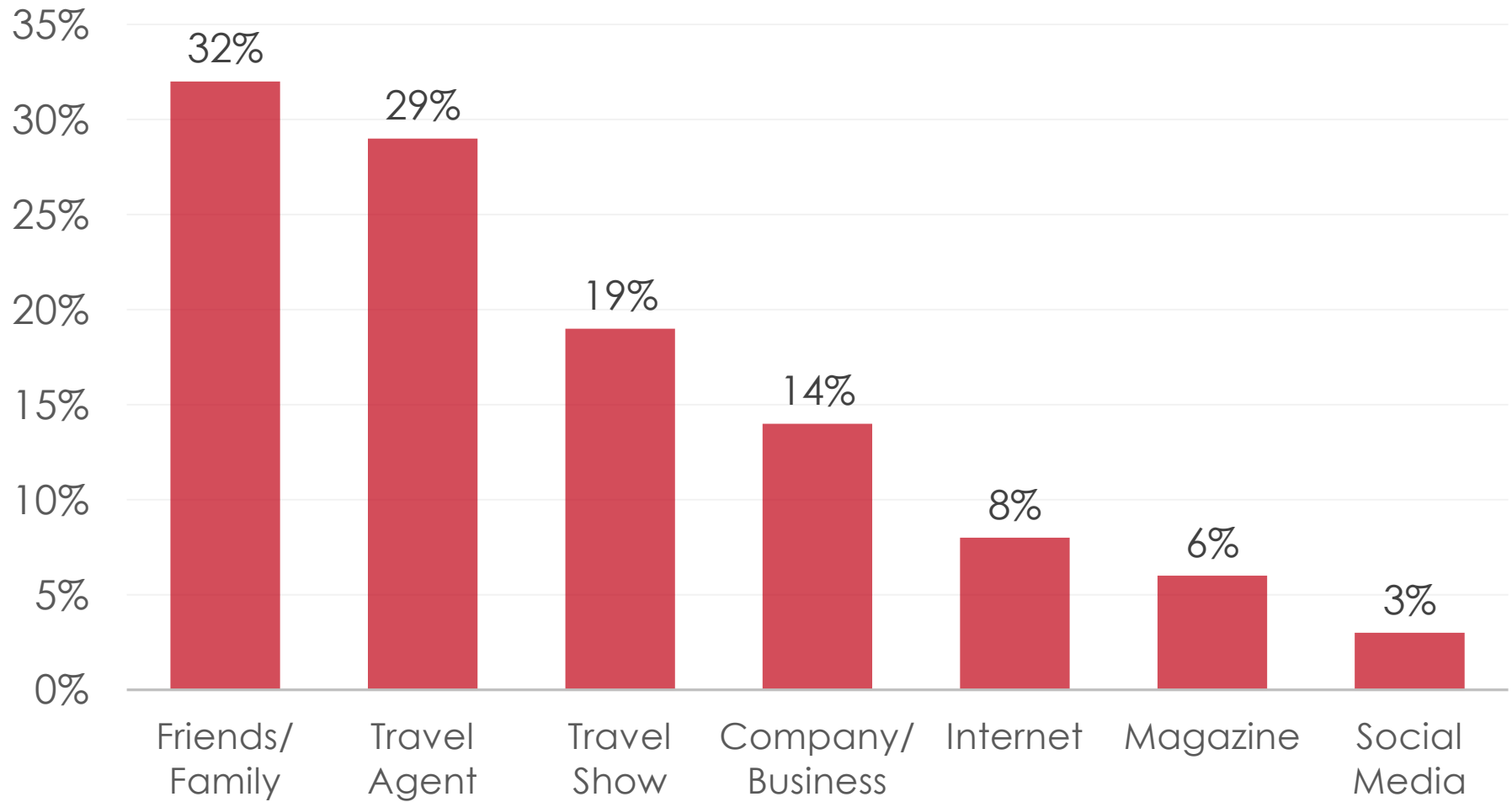


INTERNET- SOURCES OF INFORMATION

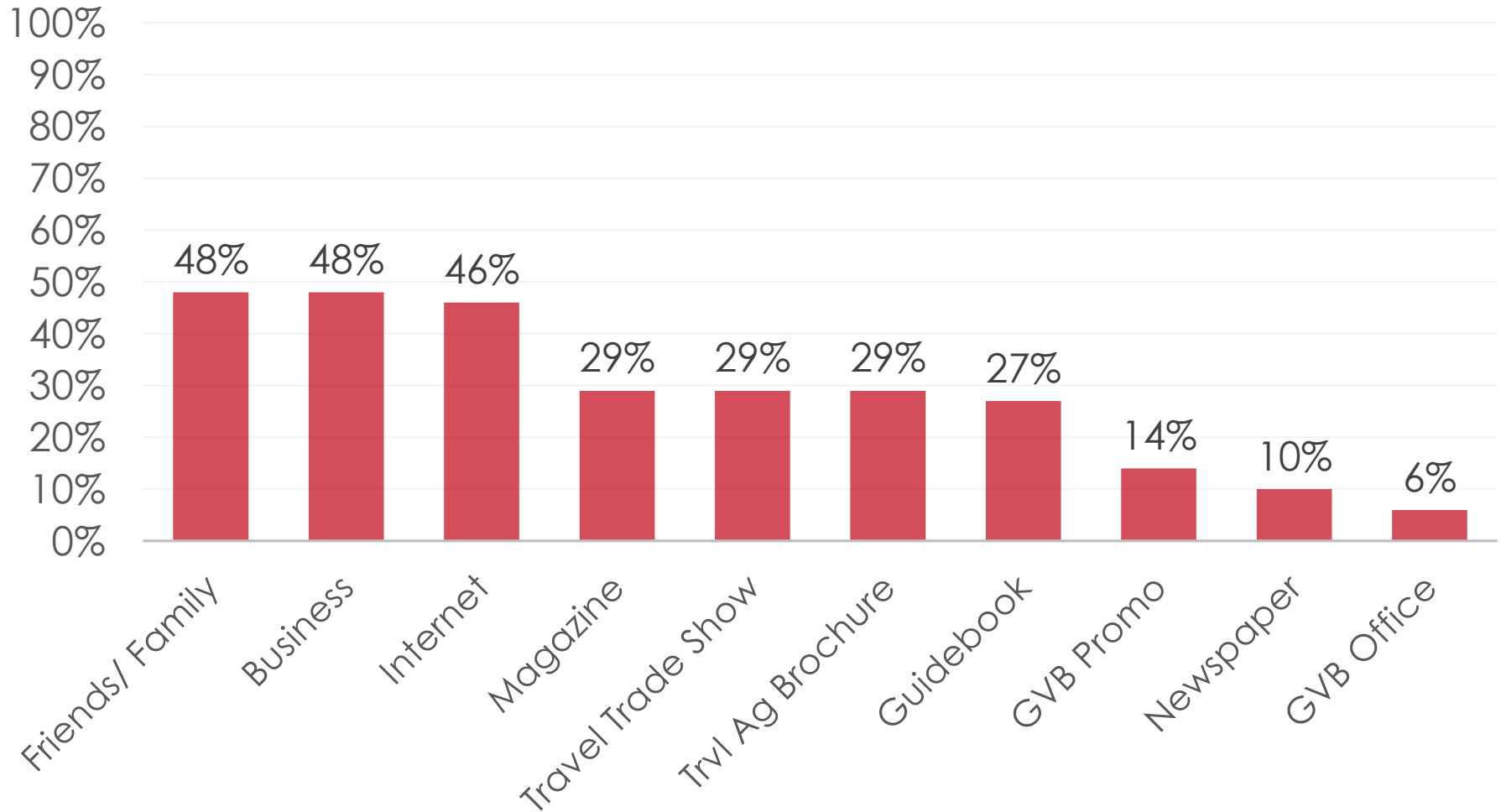
GVB



TRAVEL MOTIVATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

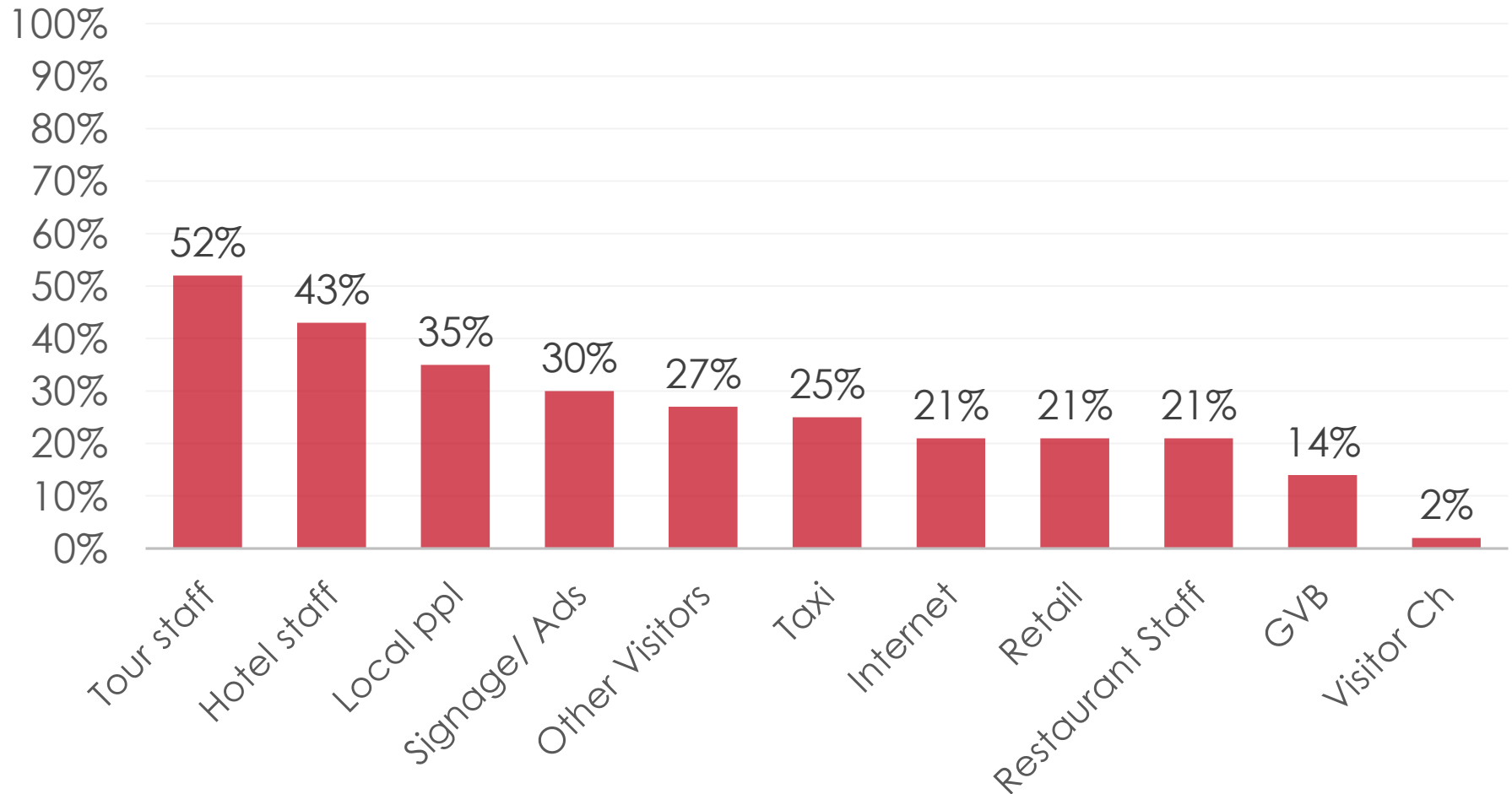
GUAM VISITORS BUREAU - EXIT SURVEY

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	Friend/ Relative	48%	62%	68%	67%		33%	50%
	Co-Worker/ Company Trvl Dept	48%	50%	50%	48%		33%	50%
	Internet	46%	50%	50%	45%	50%	33%	44%
	Travel Trade Show	29%	29%	32%	30%	100%	33%	31%
	Travel Agent Brochure	29%	29%	23%	27%		33%	28%
	Magazine (Consumer)	29%	32%	36%	33%	50%	33%	25%
	Travel Guidebook- Bookstore	27%	12%	9%	15%	50%	33%	28%
	GVB Promo	14%	15%	9%	15%		33%	13%
	Newspaper	10%	9%	9%	6%			9%
	GVB Office	6%	3%	5%	3%			9%
	Consumer Trvl Show	5%	3%	5%	3%			6%
	Prior Trip	5%	3%	5%	3%	50%		6%
	Theater Ad	3%	6%	5%	6%		33%	3%
	Radio	3%	3%		3%			3%
	Other	2%						
	TV	2%						
	Total	63	34	22	33	2	3	32

ONISLE

SOURCES OF INFORMATION



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.

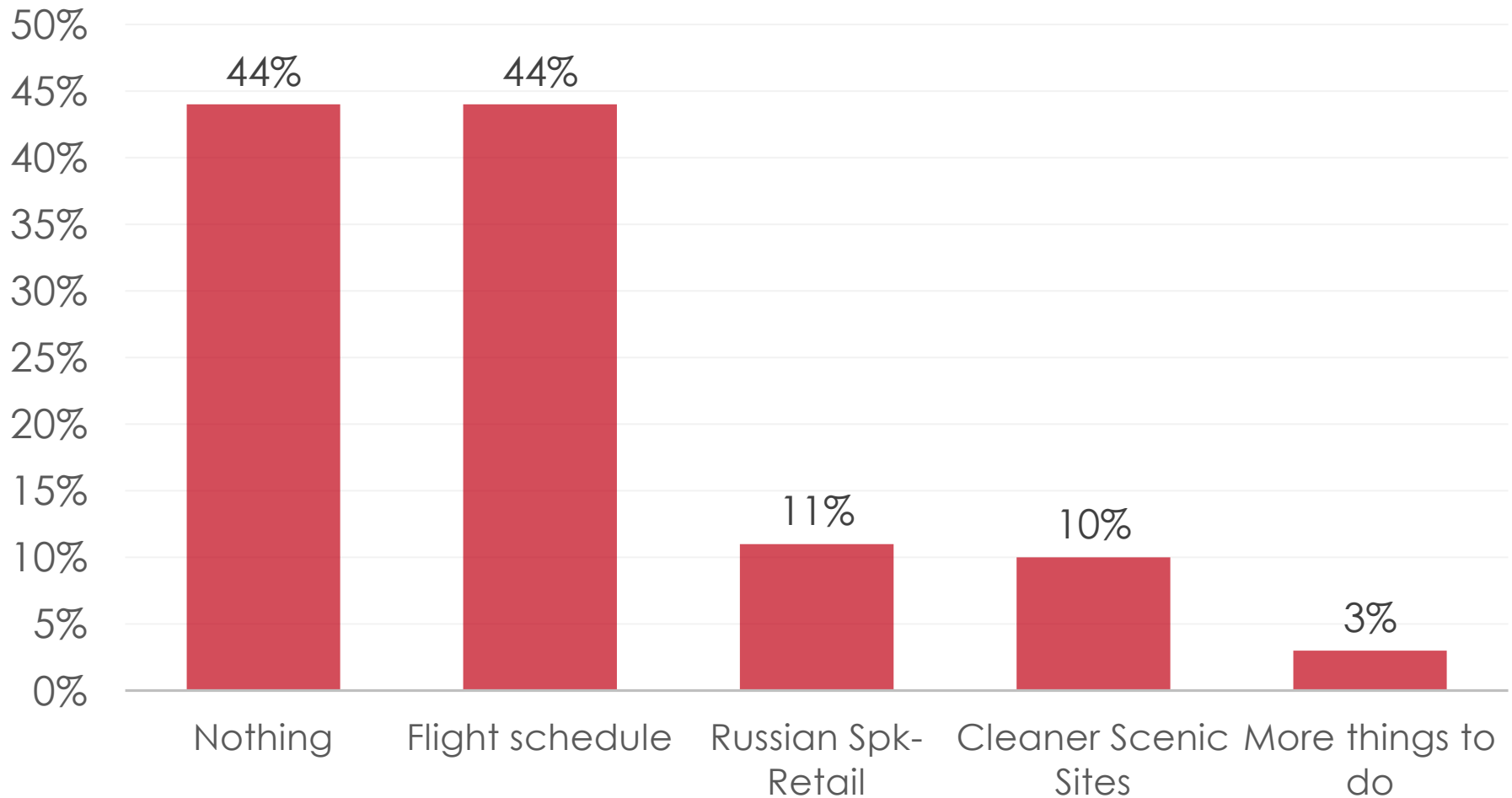
	TOTAL	FAMILY	WIFE TRVL W/ HUSBAND	TRVL W/ SPOUSE	MICE	HONEYMOON	ADVENTURE
	-	-	-	-	-	-	-
Q2 Tour Staff	52%	53%	55%	52%	100%	100%	56%
Hotel Staff	43%	50%	50%	52%			47%
Local Ppl	35%	41%	36%	42%	50%	67%	44%
Signs/ Advertisement	30%	29%	32%	33%	50%	33%	28%
Other Visitors	27%	29%	27%	30%	50%		25%
Taxi Driver	25%	24%	27%	21%			25%
Internet	21%	15%	14%	12%			16%
Restaurant Staff	21%	18%	18%	18%	50%	33%	16%
Retail Staff	21%	24%	23%	24%		67%	19%
GVB	14%	15%	18%	12%			16%
Other	2%						
Local Publication	2%						3%
Visitor Channel	2%	3%		3%			
Total	63	34	22	33	2	3	32

Prepared by QMark Research

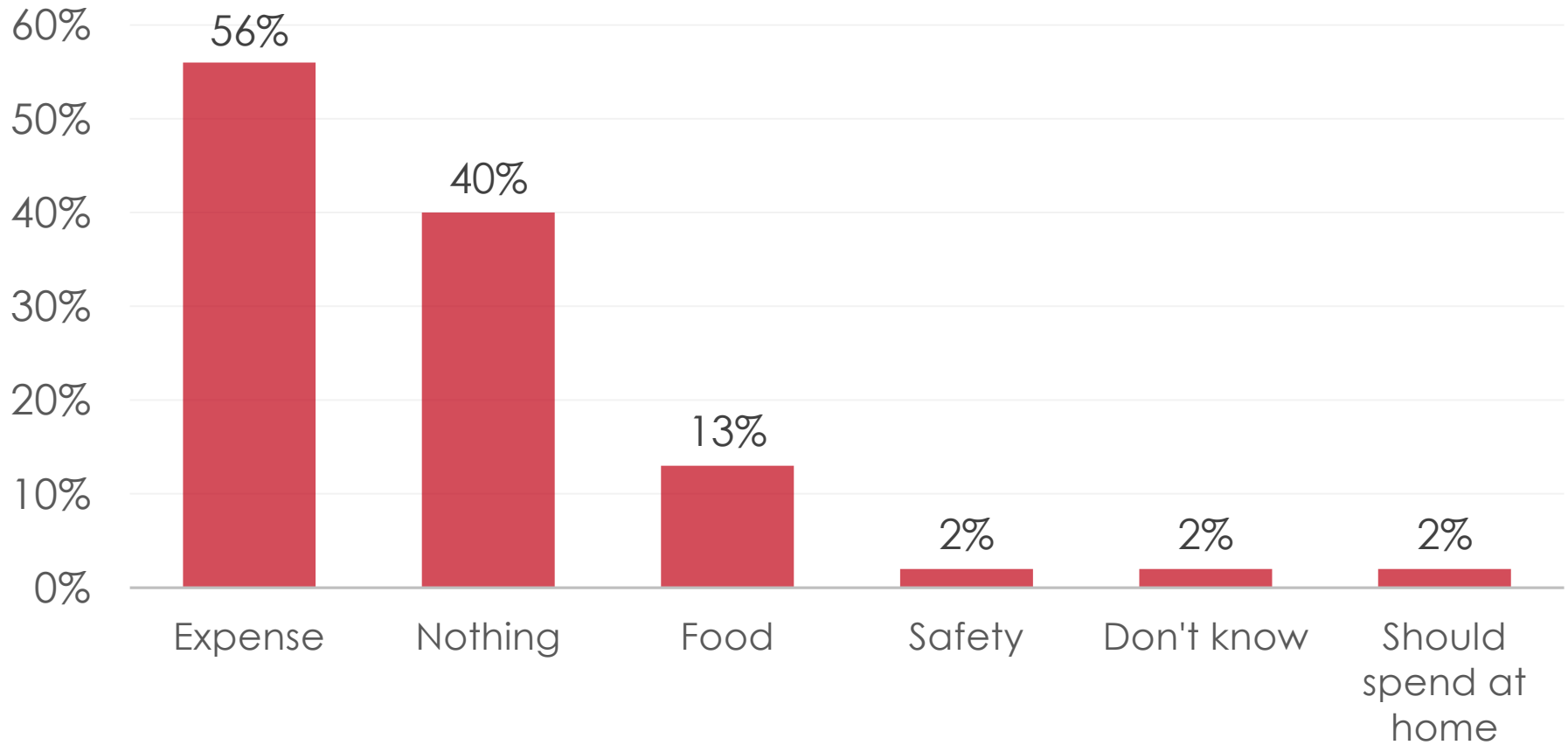
SECTION 6

FUTURE TRAVEL TO GUAM

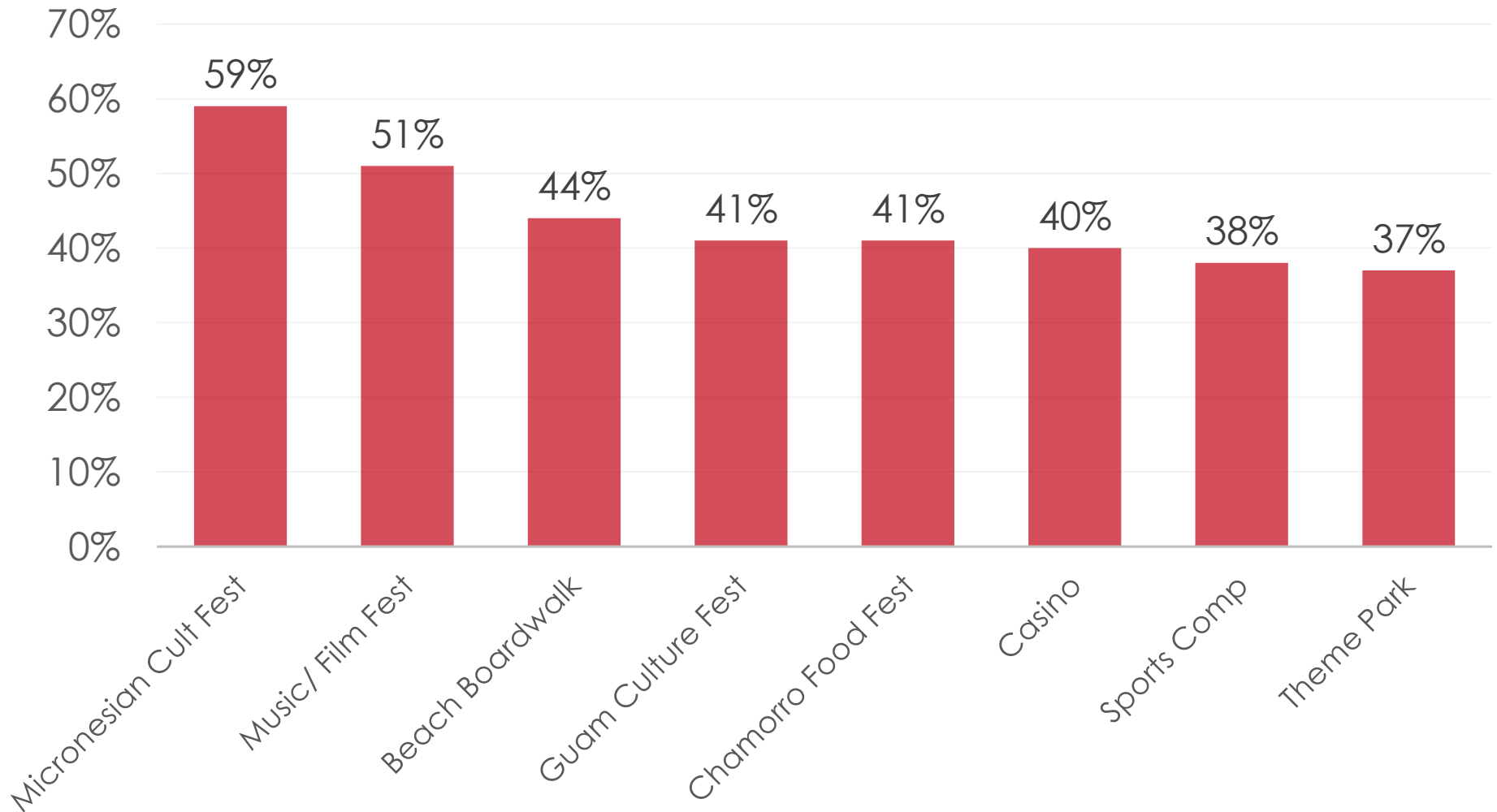
What would it take to make you stay an extra day on Guam?



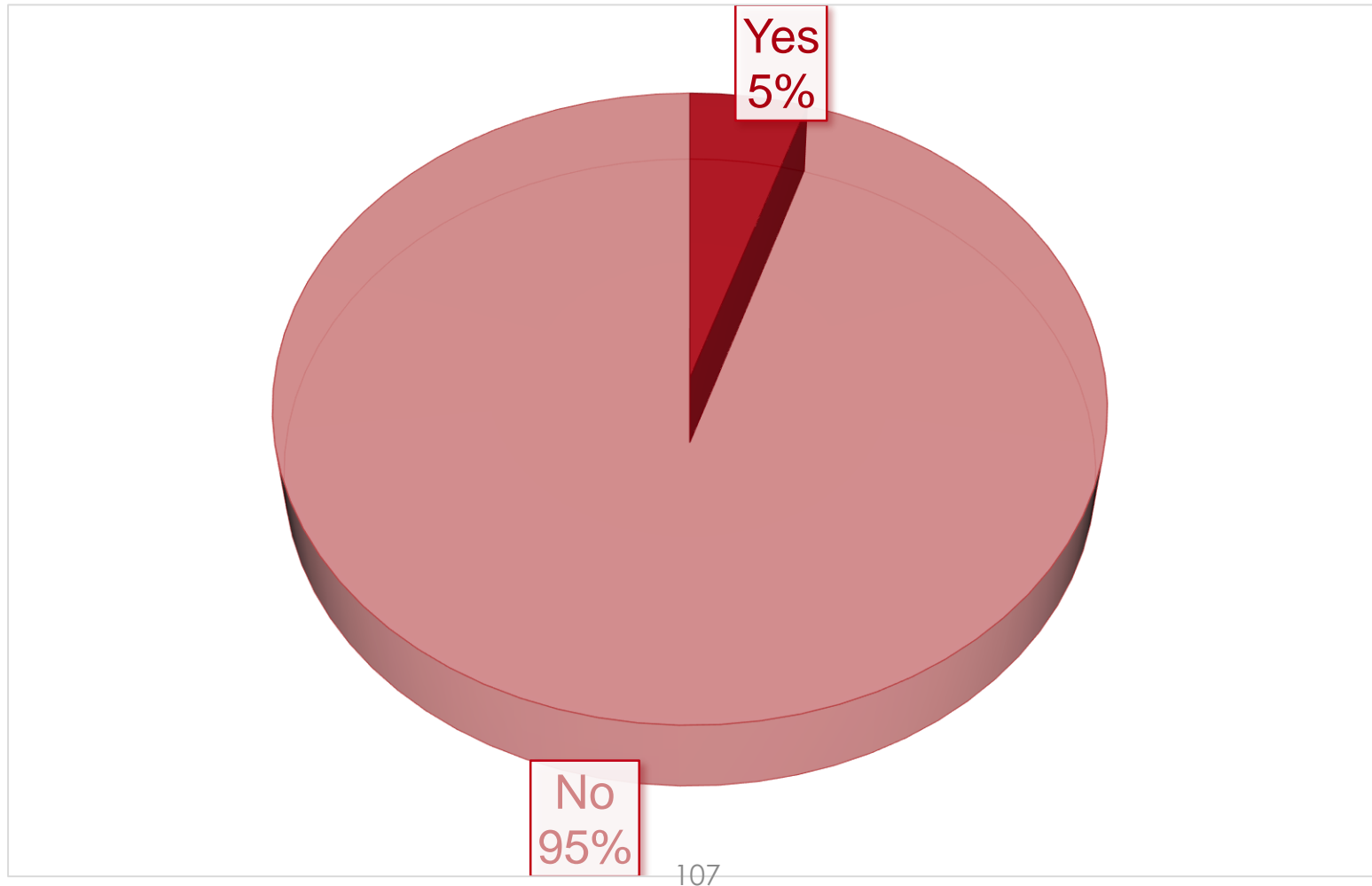
FUTURE TRAVEL CONCERNS



ACTIVITIES/ ATTRACTIONS- APPEAL

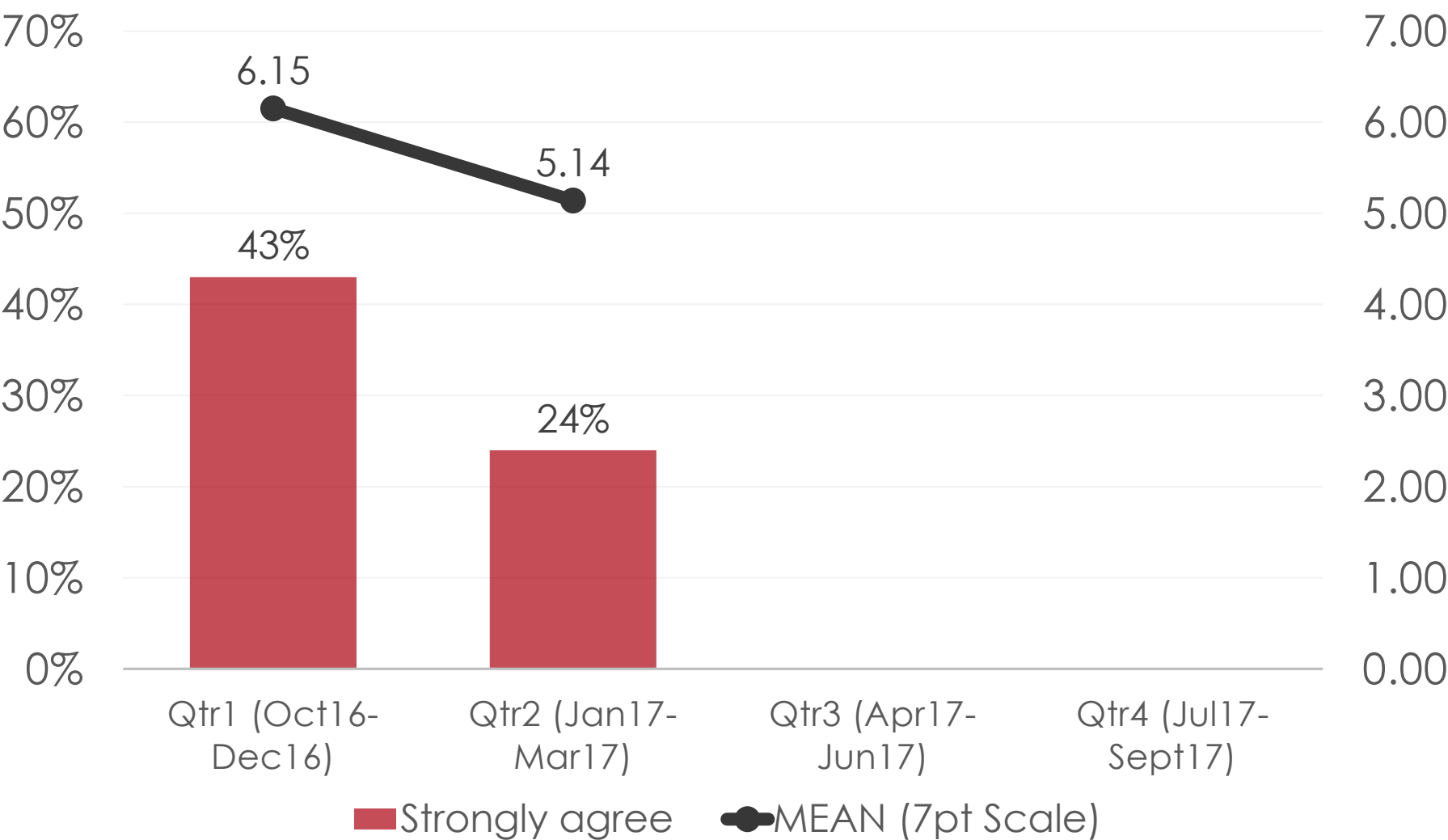


Will security screening/ immigration at Guam Airport impact future travel to Guam?

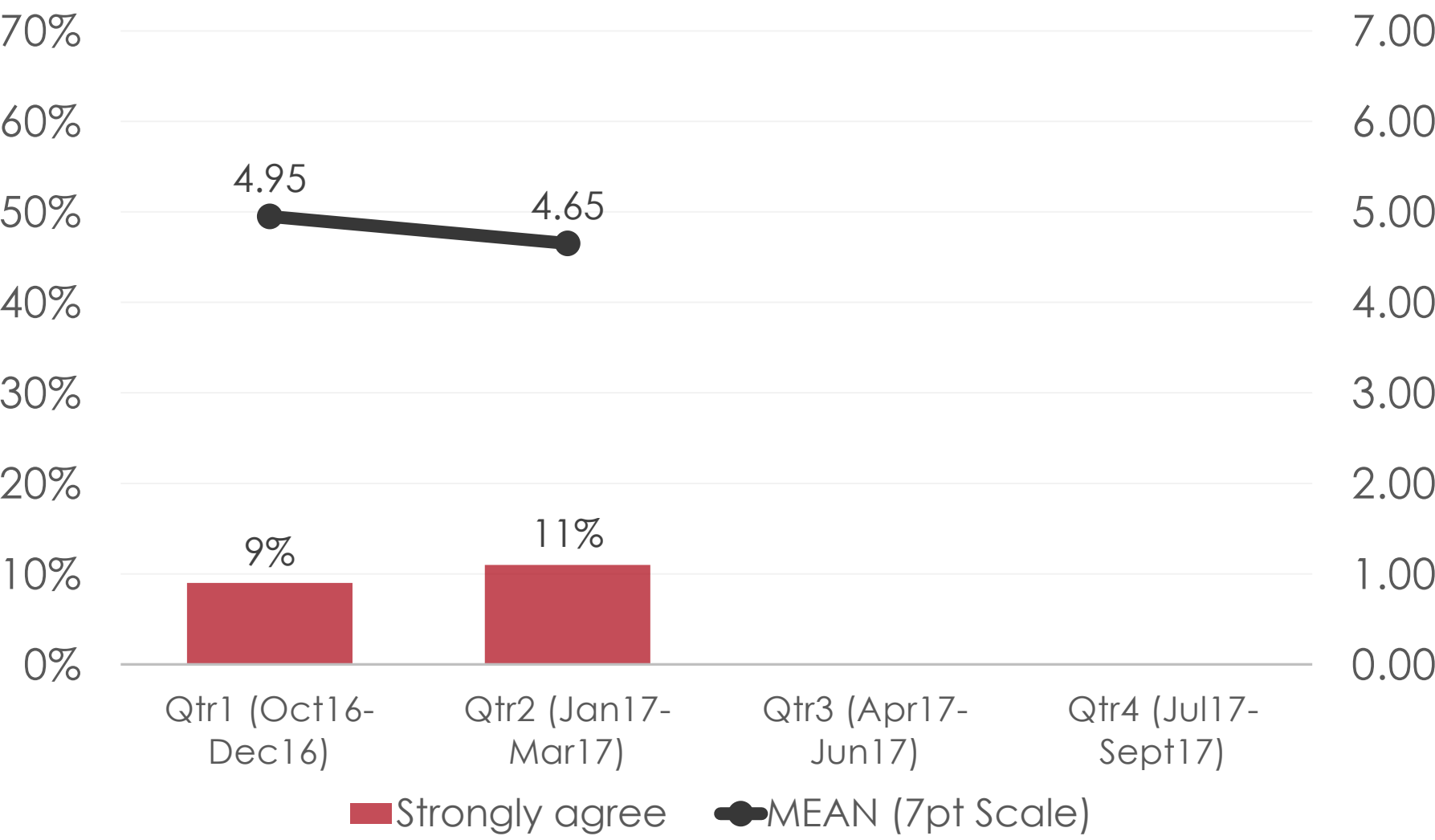


Guam Airport Arrival

Need Russian Speaking Officials

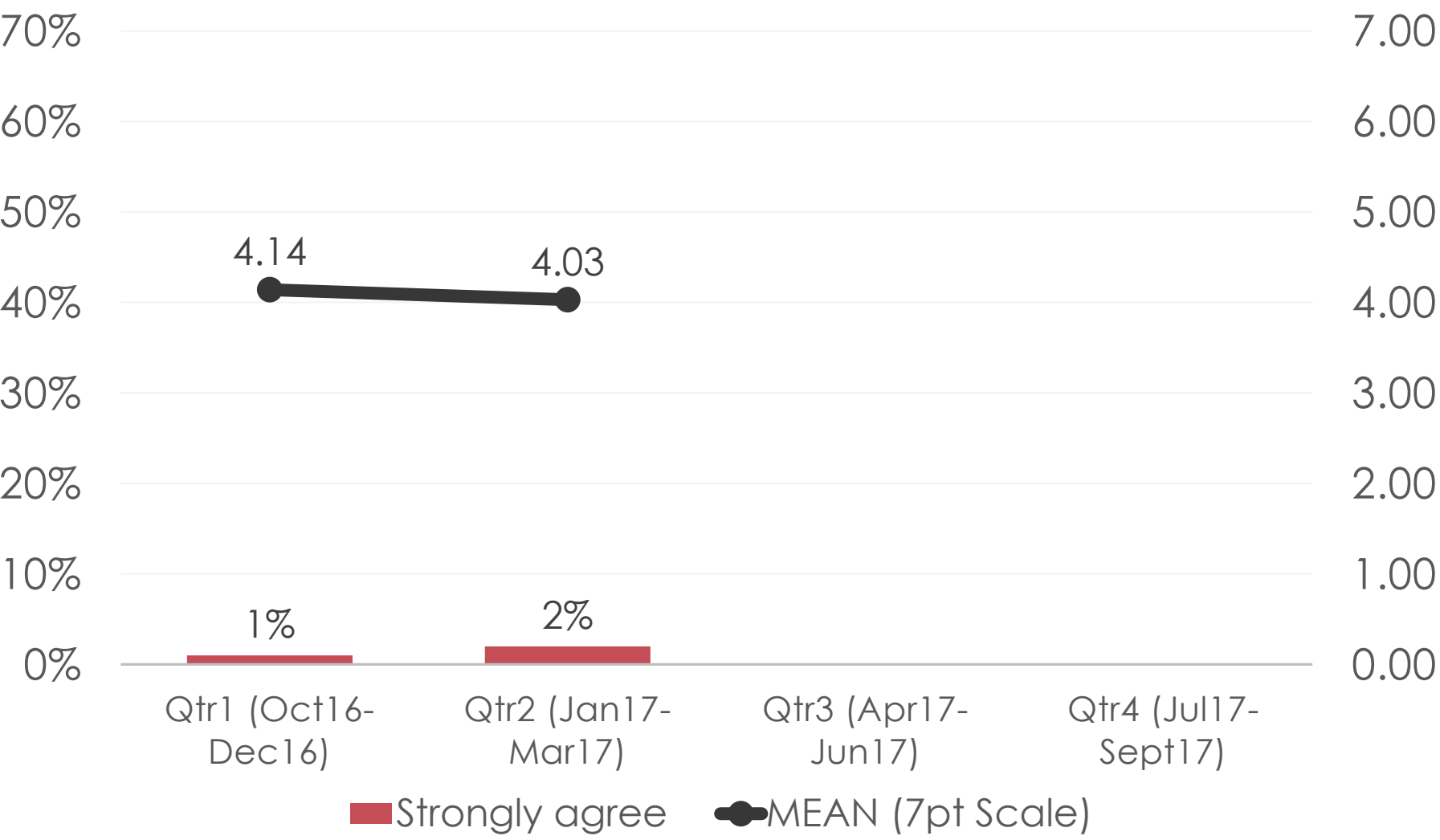


Guam Airport Arrival Need More Immigration Officers



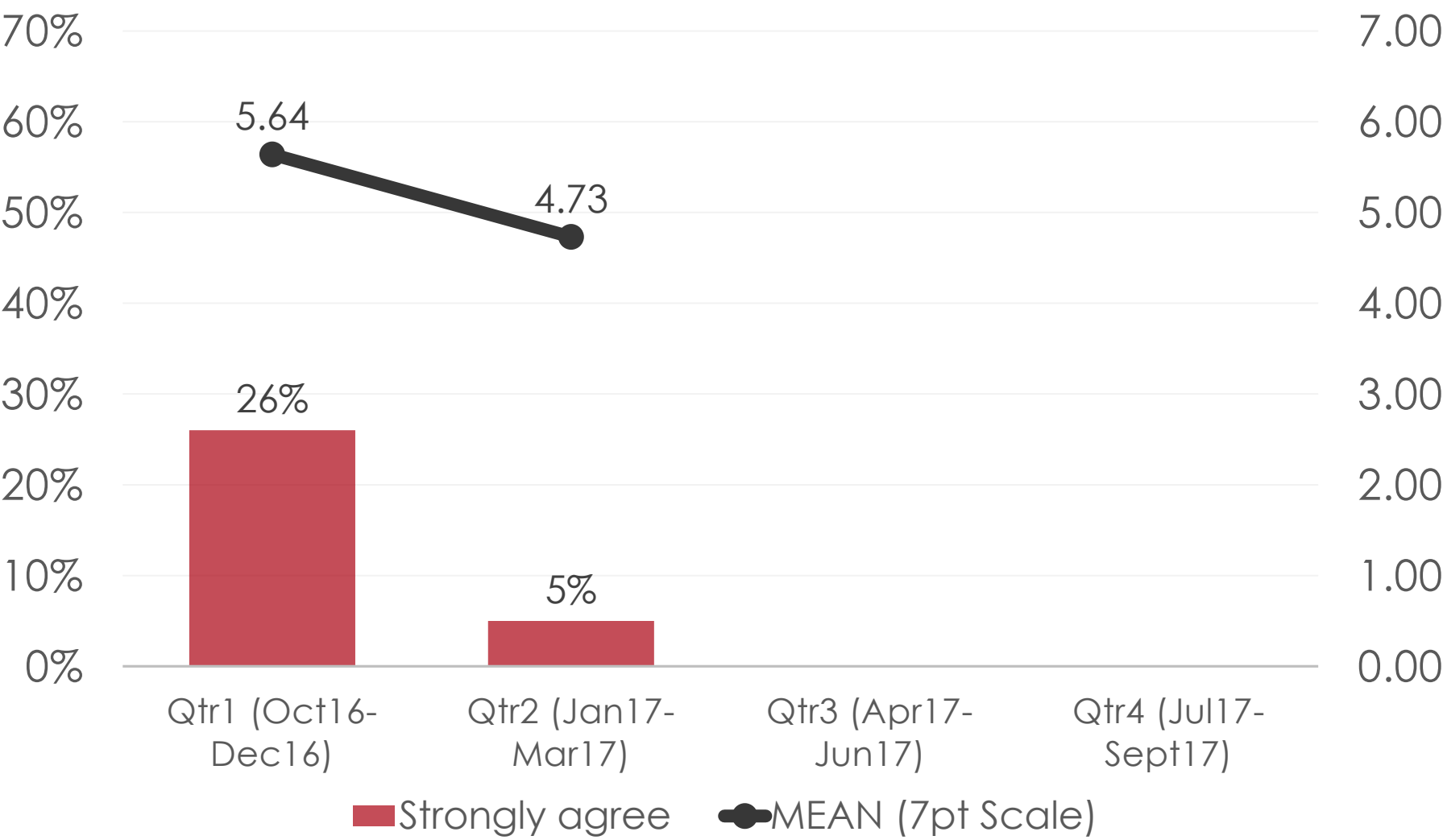
Guam Airport Arrival

Need Friendlier Airport Officials



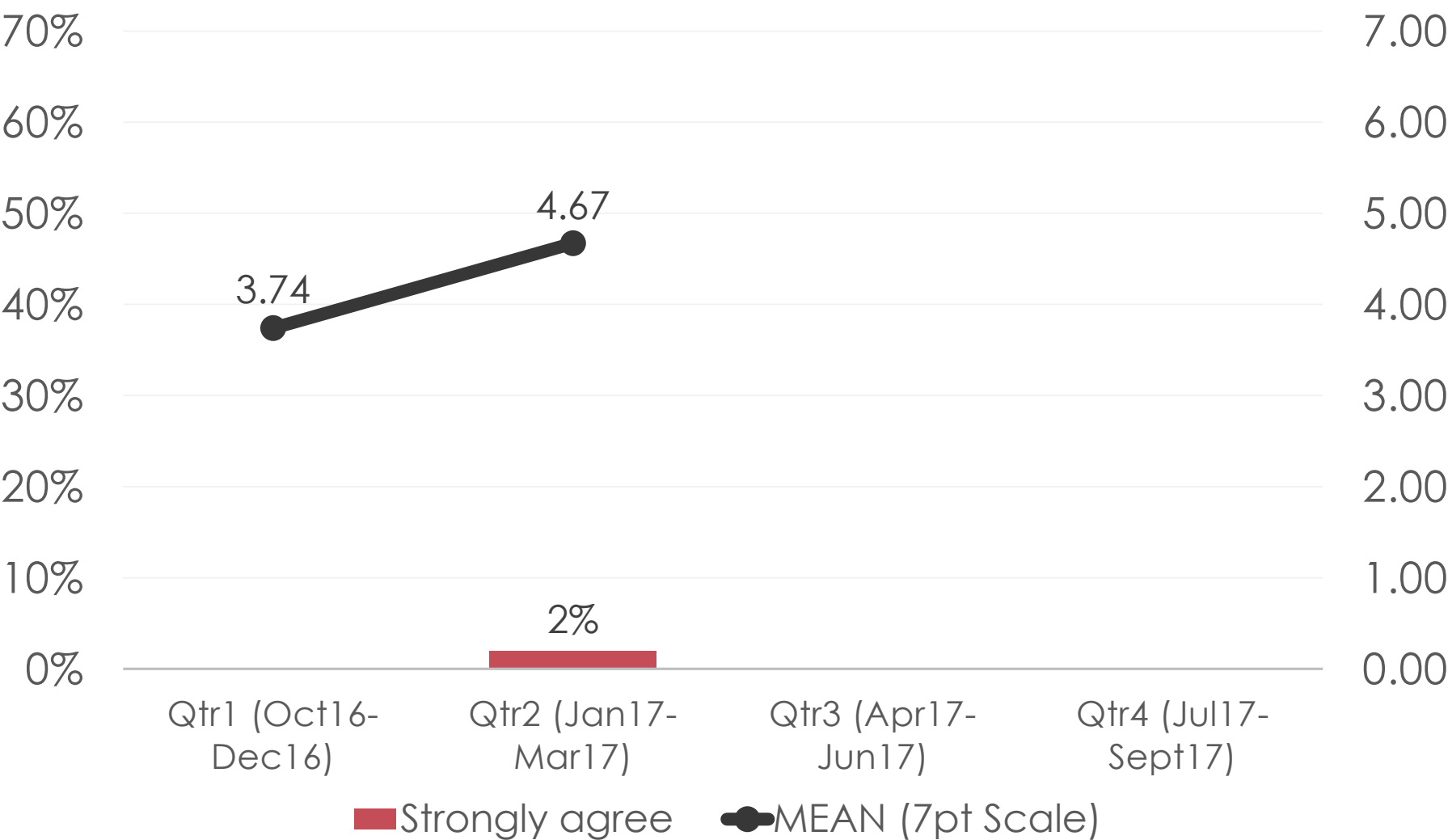
Guam Airport Arrival

The Airport Facilities Were Clean/ Appealing



Guam Airport Arrival

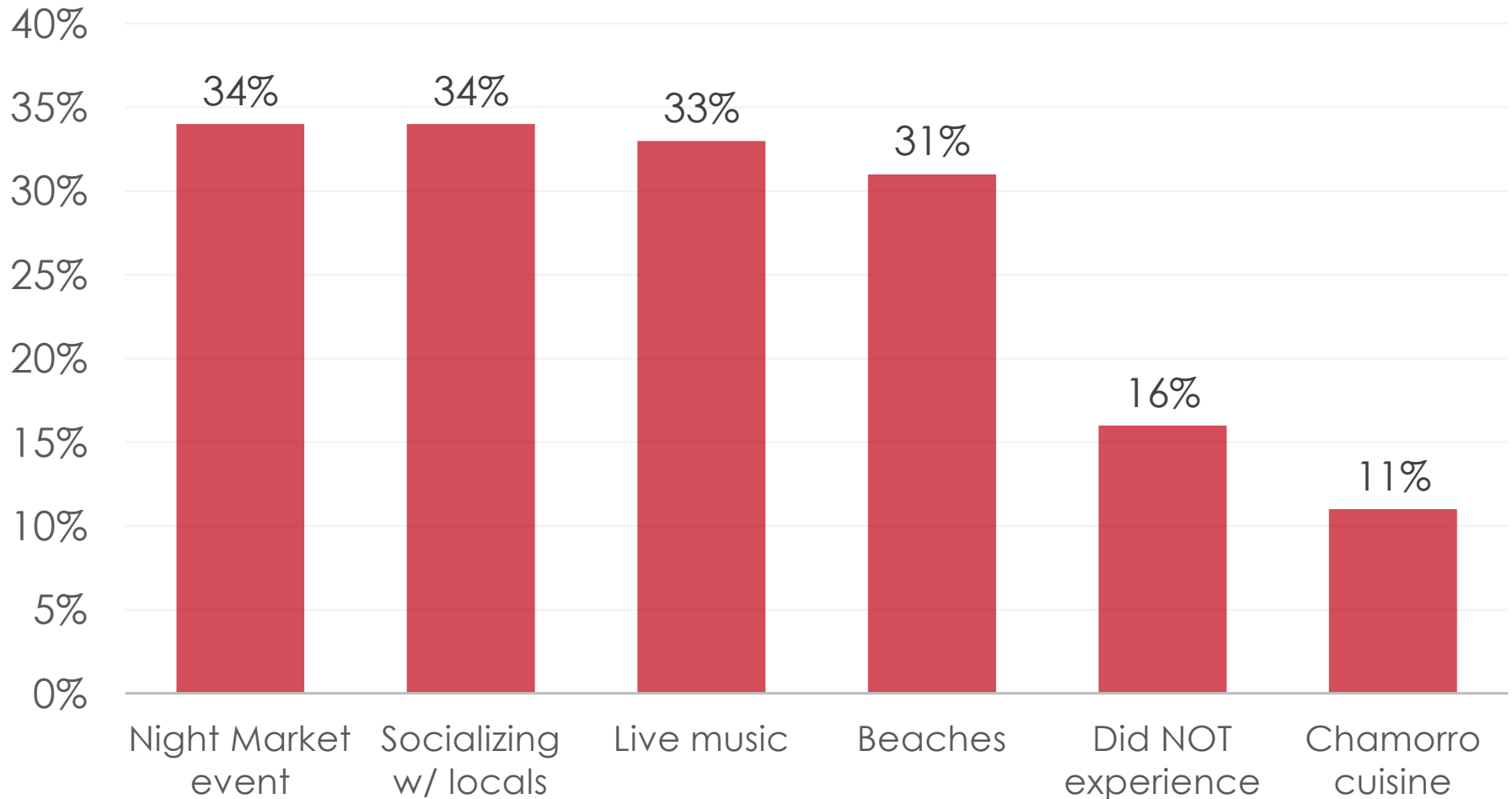
The Airport Facilities Need to be Better Maintained



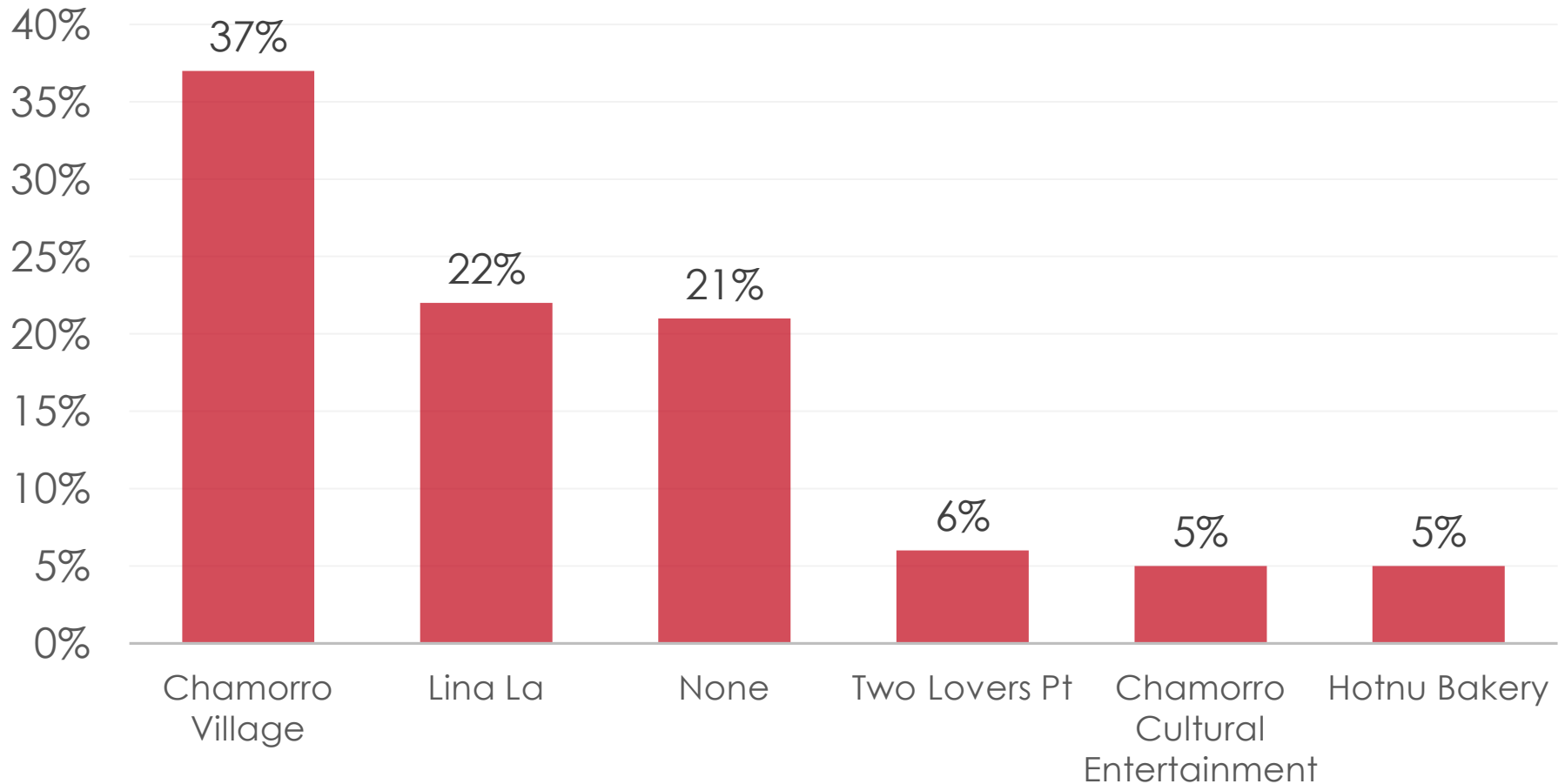
SECTION 7

GUAM CULTURE

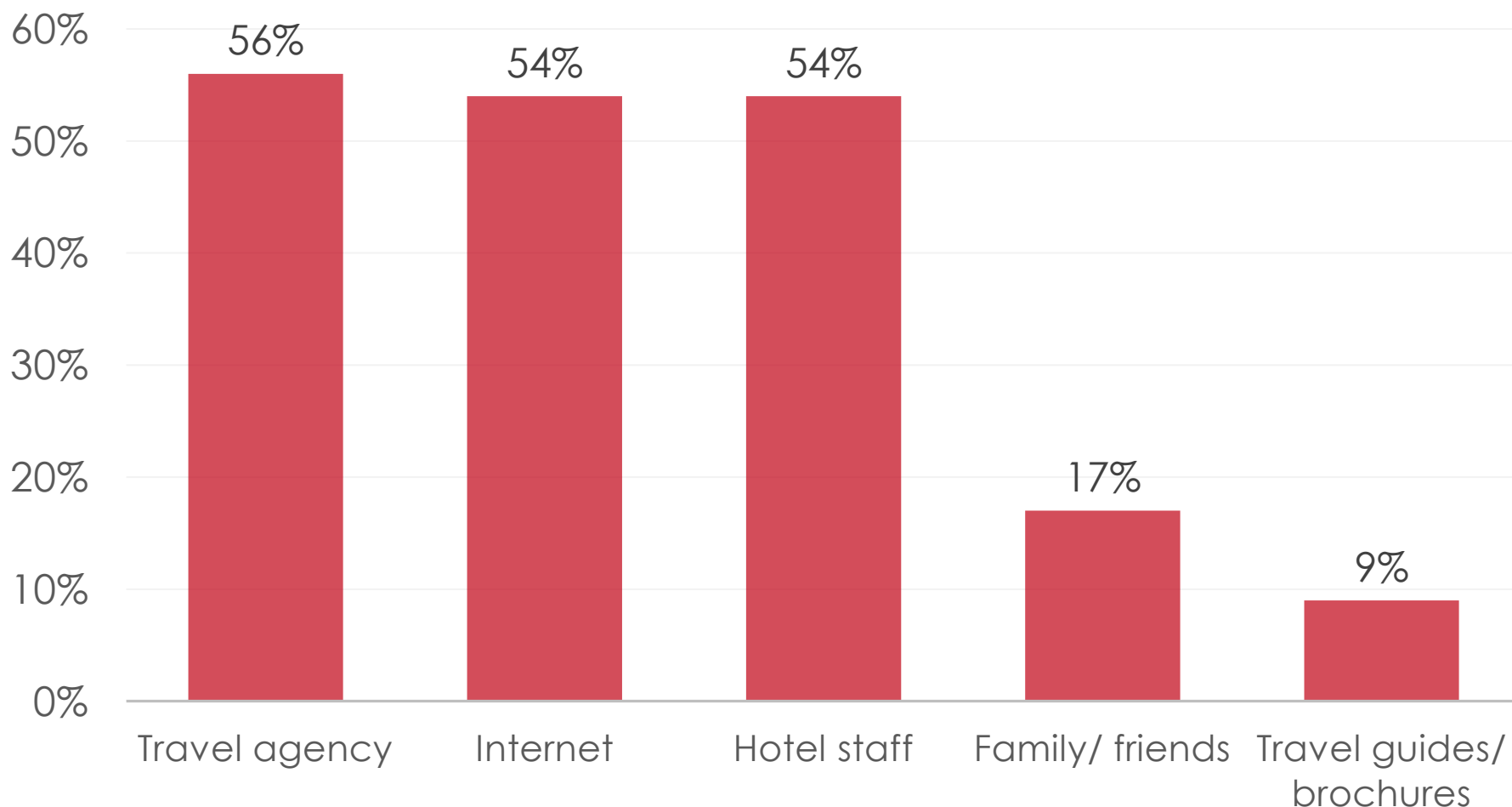
EXPERIENCED- CHAMORRO/ HAF A AD AI SPIRIT



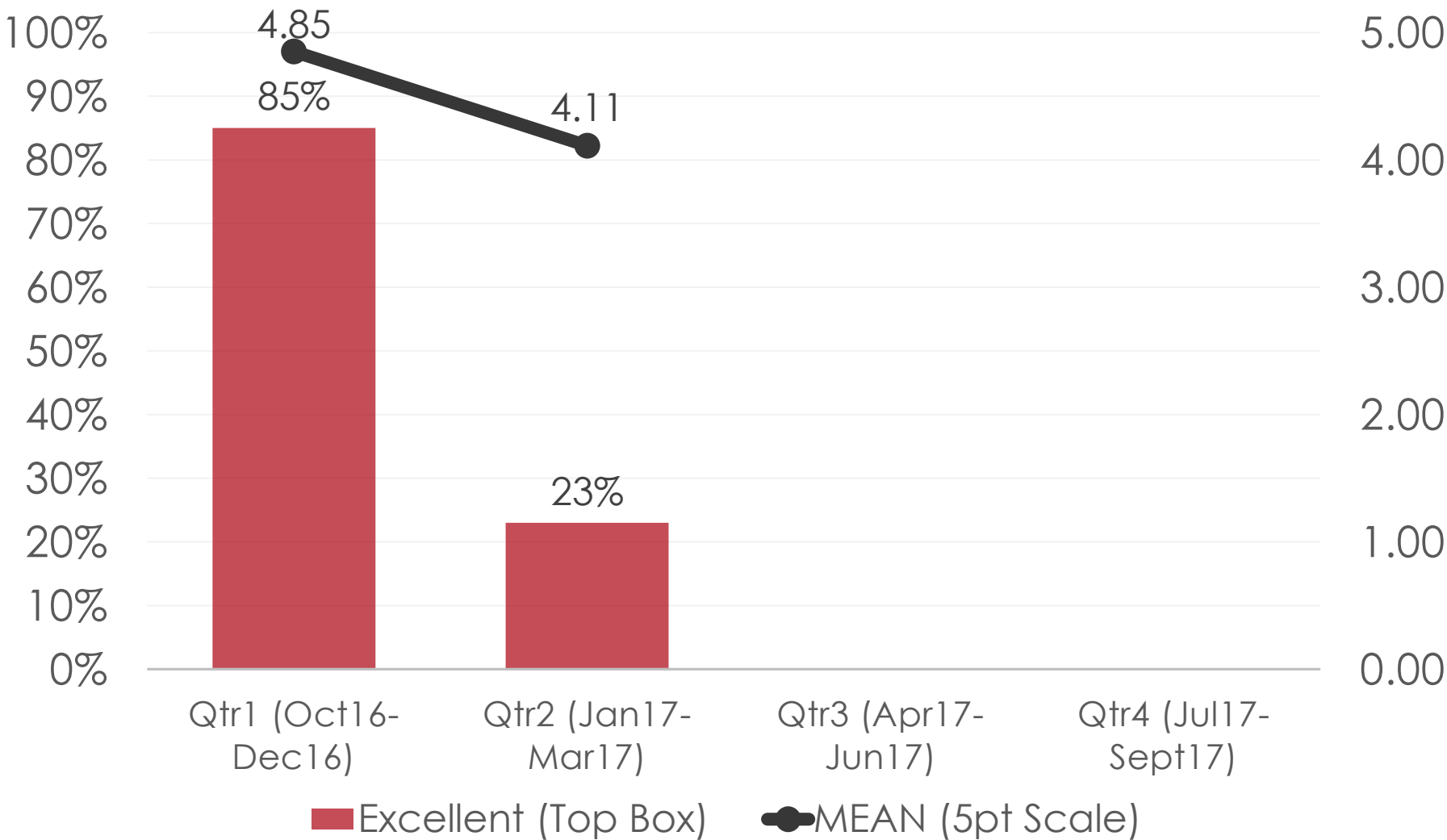
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



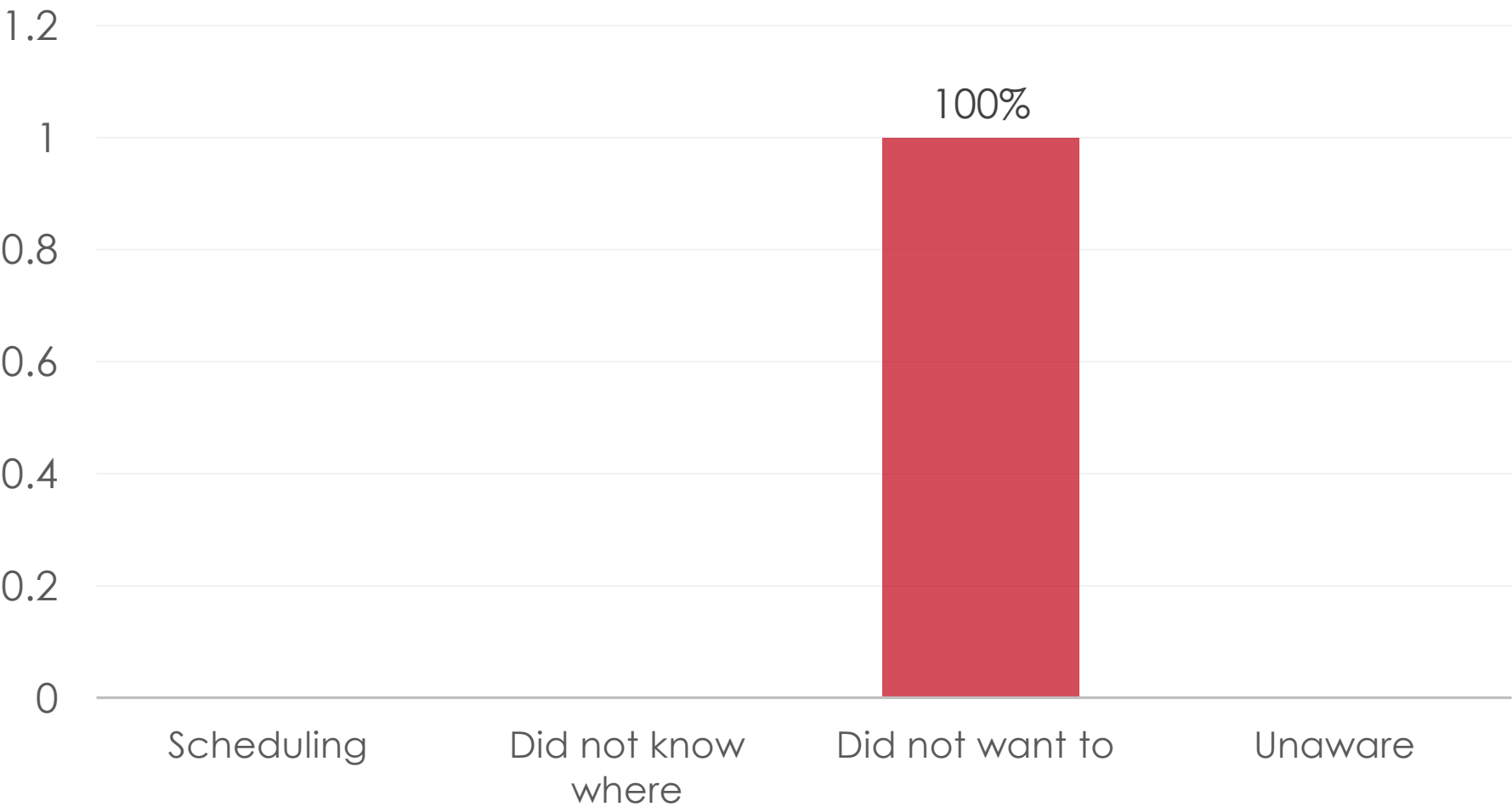
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



SATISFACTION- CULTURAL ACTIVITY/EVENTS



OBSTACLES- CULTURAL ACTIVITY/EVENTS



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 ($p \leq .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Drivers- Overall Satisfaction

Comparison of Drivers of Overall Satisfaction, 1st, 2nd Qtr and Overall 1-2 Qtr 2017			
	1st Qtr	2nd Qtr	Combined 1-2 Qtr 2017
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks			
Ease of getting around		4	3
Safety walking around at night			
Quality of daytime tours		1	
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping			
Variety of shopping		2	2
Price of things on Guam	1		
Quality of hotel accommodations			
Quality/cleanliness of air, sky			4
Quality/cleanliness of parks			
Quality of landscape in Tumon	2	3	1
Quality of landscape in Guam			
Quality of ground handler			
Quality/cleanliness of transportation vehicles	3		
% of Per Person On Island Expenditures Accounted For	75.9%	80.9%	72.8%

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Russian visitor's experience on Guam is driven by four significant factors in the 2nd Quarter 2017 Period. By rank order they are:
 - **Quality of day time tours,**
 - **Variety of shopping,**
 - **Quality of landscape in Tumon, and**
 - **Ease of getting around.**
- With all four factors the overall r^2 is .809 meaning that **80.9% of overall satisfaction is accounted for by these factors.**

Drivers – On-Isle Expenditures

Comparison of Drivers of Per Person On Isle Expenditure, 1st,2nd Qtr and Overall 1-2 Qtr 2017			
	1st Qtr	2nd Qtr	Combined 1-2 Qtr 2017
Drivers:	rank	rank	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%	0.0%	0.0%
NOTE: Only significant drivers are included.			

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Russian visitors on Guam is driven by no significant factors in the 2nd Quarter 2017 period.