



# **GUAM VISITORS BUREAU**

## **Russia Visitor Tracker Exit Profile**

### **FY2014**

### **2nd Quarter (January-March 2014)**



**Prepared by: QMark Research**

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# Background & Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **150** departing Russian visitors were randomly interviewed and was coordinated with the Russian tour agents to be interviewed by QMark interviewers before departing the island.
- The margin of error for a sample of **150** is +/- 8.00 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 +/- 8.00 percentage points.

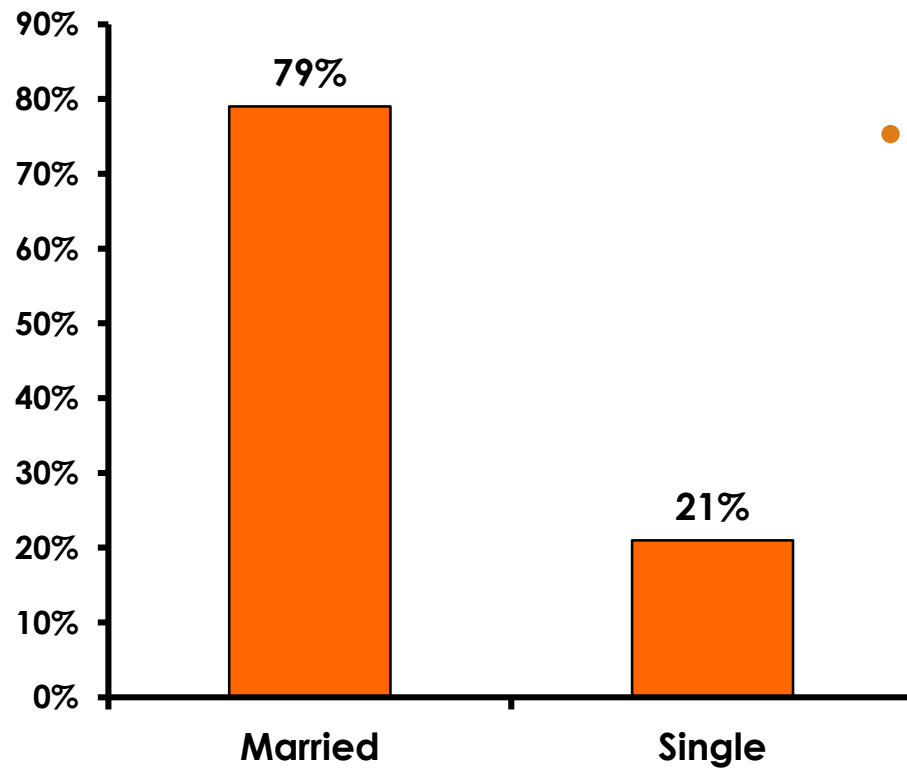
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# OBJECTIVES

- 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.

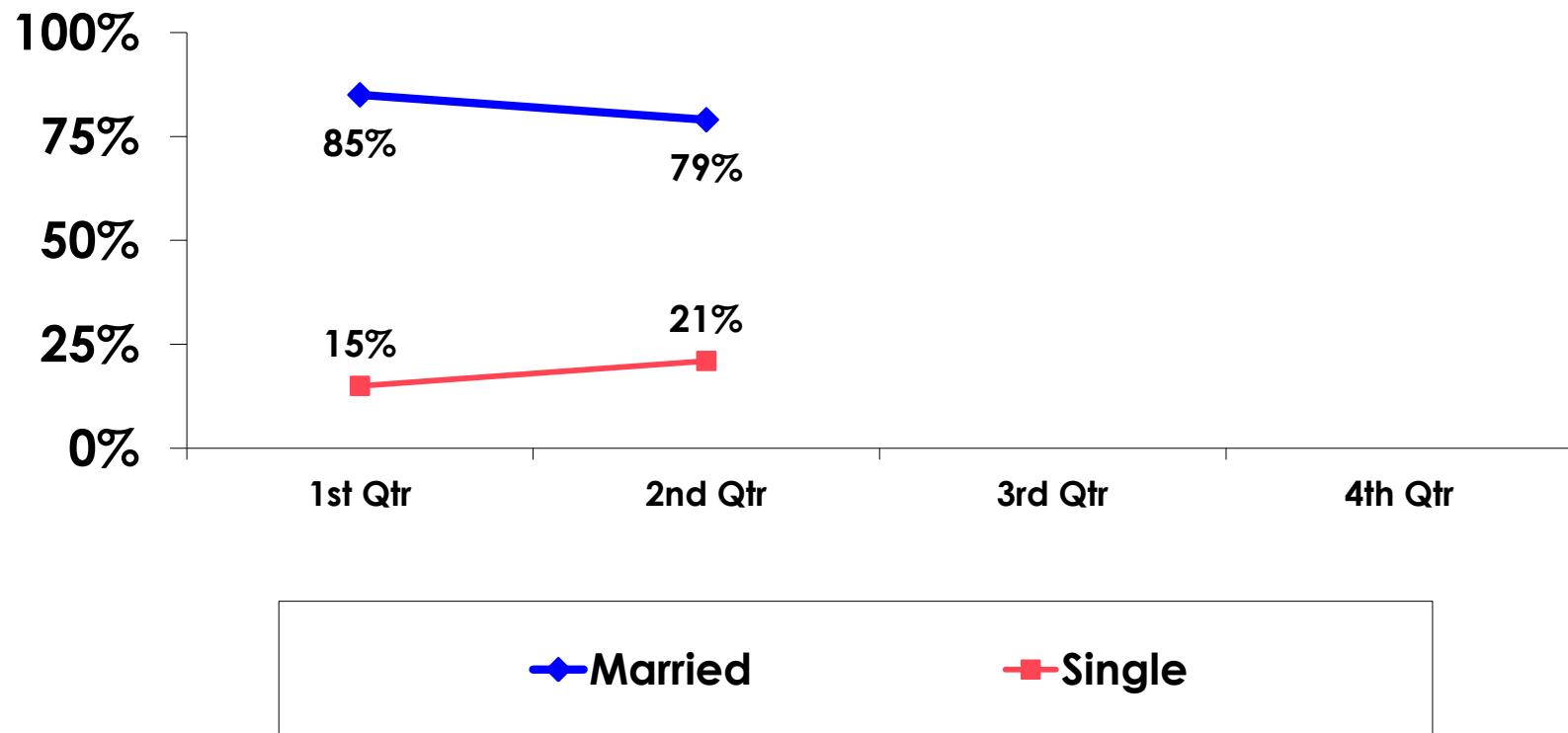
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

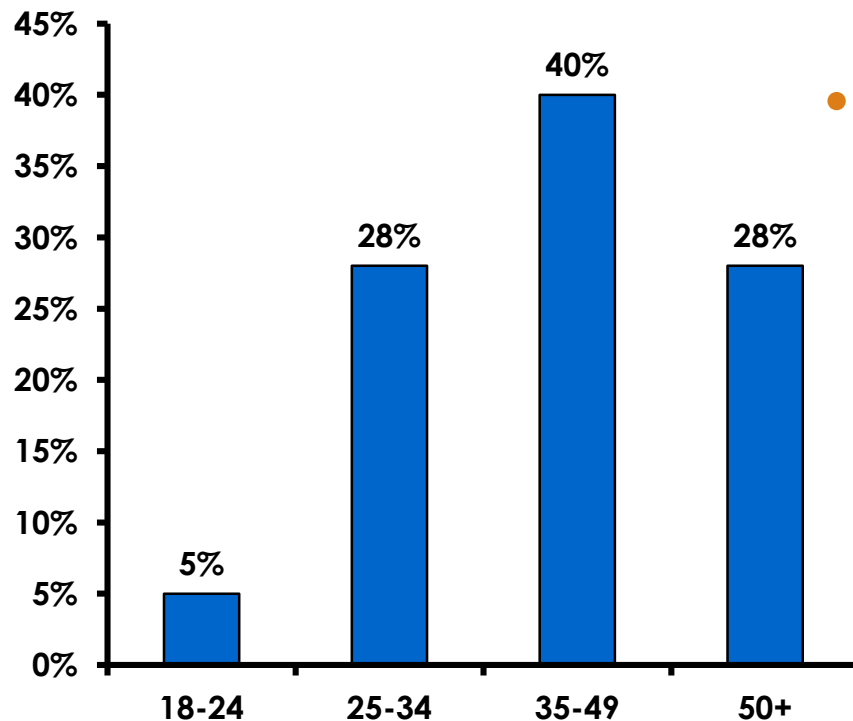


- Majority of Russian visitors are married.

# MARITAL STATUS

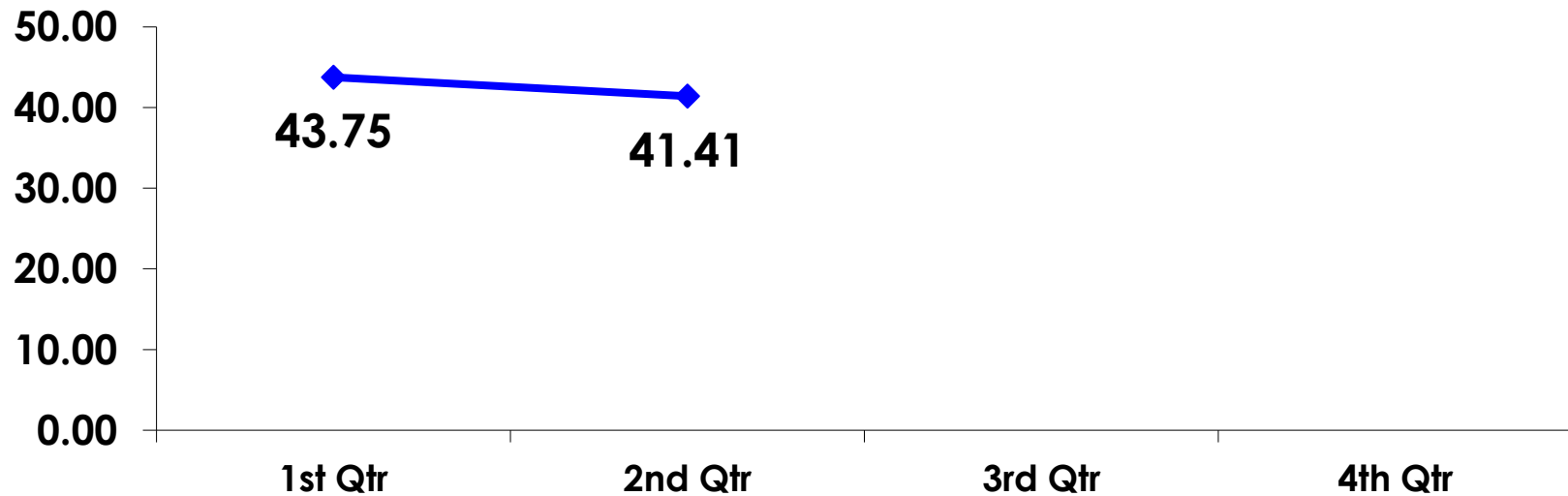


# Age - Overall



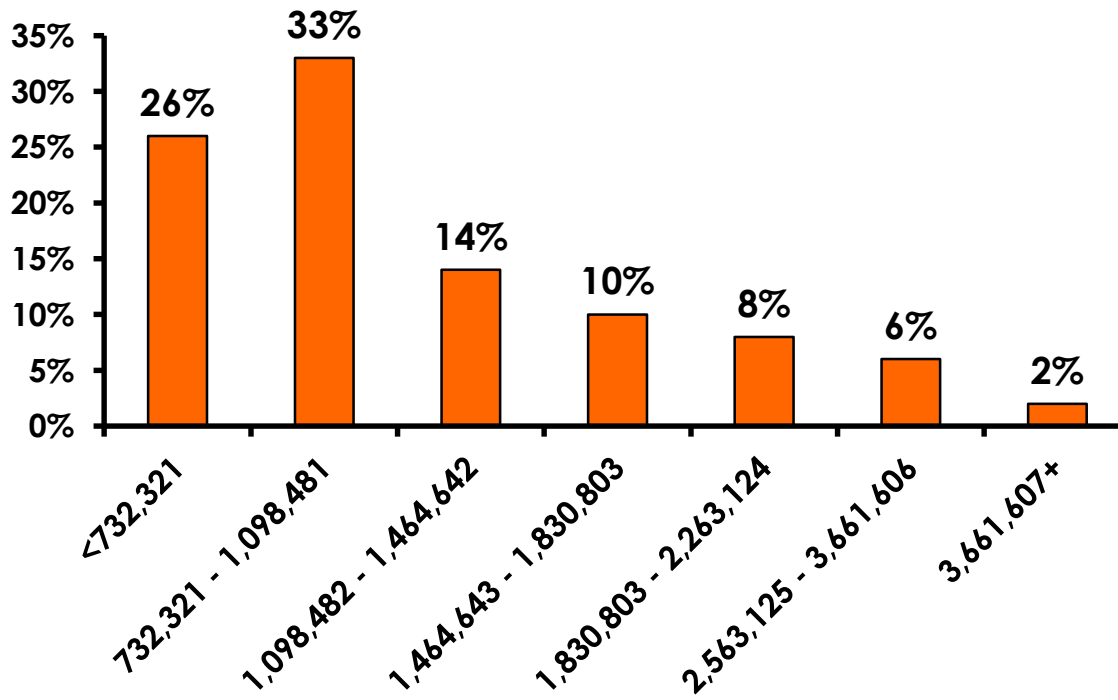
- The average age of the respondents is 41.41 years of age.

# AVERAGE - AGE



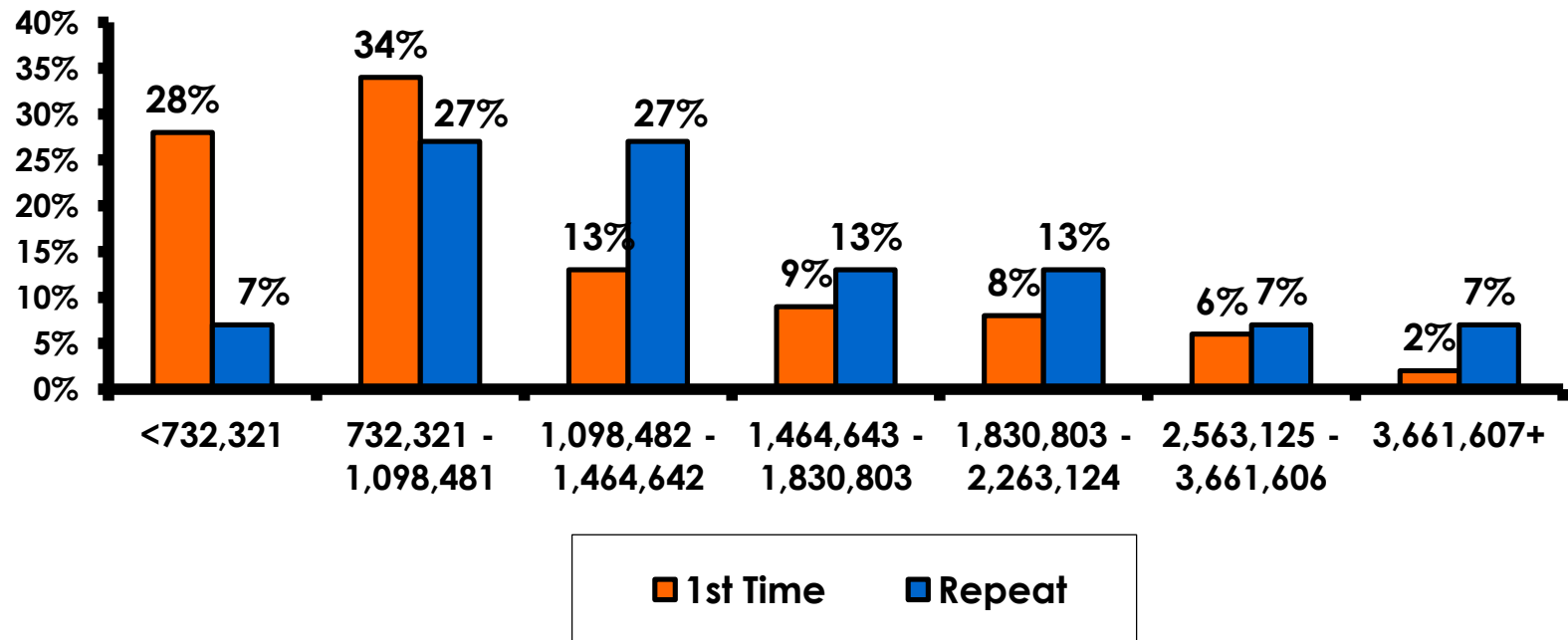


# Personal Income



- Ruble  
35.34=\$1

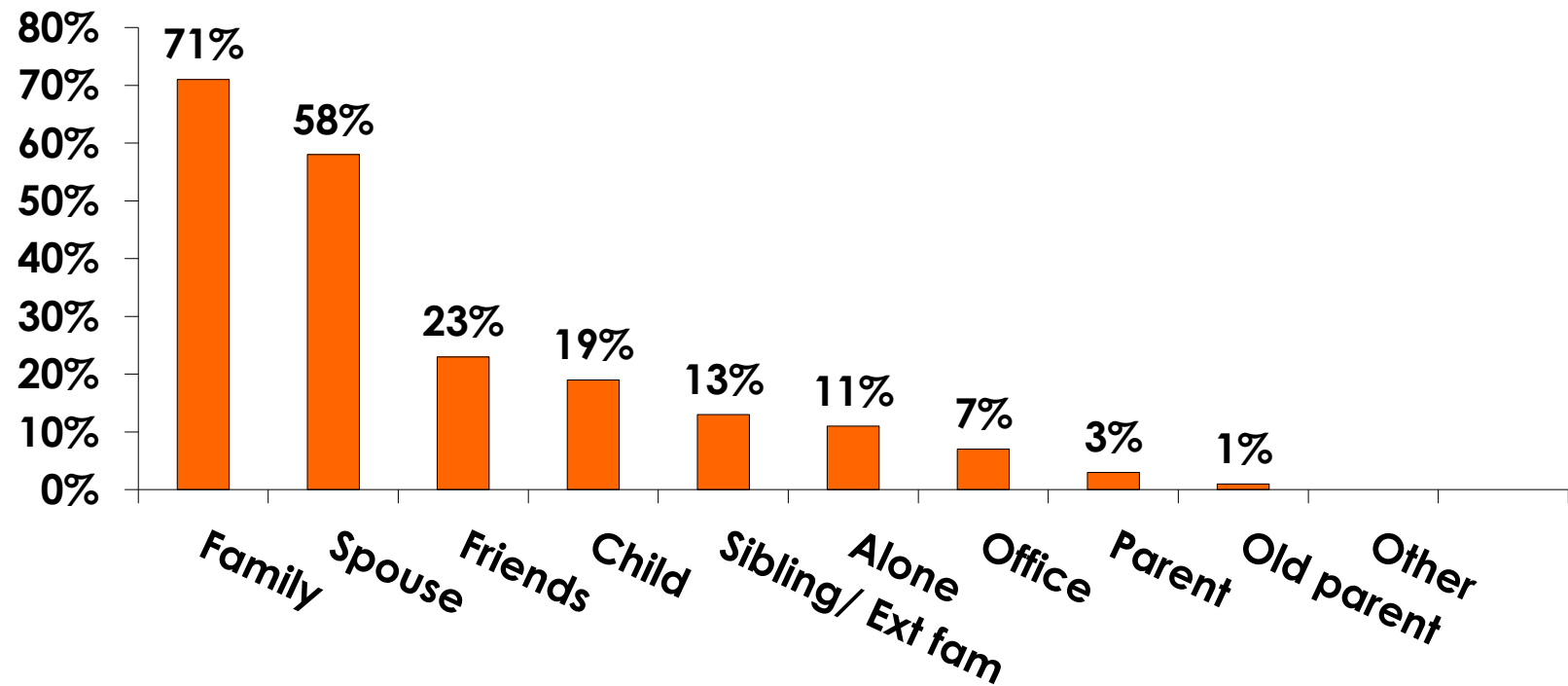
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q27	<732,321	Count	38	15	23	3	17	9	9
		Column N %	26%	20%	32%	43%	41%	15%	23%
	732,321-1,098,481	Count	49	25	24	2	15	23	9
		Column N %	33%	33%	33%	29%	37%	39%	23%
	1,098,482-1,464,642	Count	21	9	12		6	7	8
		Column N %	14%	12%	17%		15%	12%	21%
	1,464,643-1,830,803	Count	14	7	7	1	1	6	6
		Column N %	10%	9%	10%	14%	2%	10%	15%
	1,830,803-2,263,124	Count	12	8	4		1	4	6
		Column N %	8%	11%	6%		2%	7%	15%
	2,563,125-3,661,606	Count	9	9			1	7	1
		Column N %	6%	12%			2%	12%	3%
	3,661,607+	Count	3	2	1			3	
		Column N %	2%	3%	1%			5%	
	No Income	Count	1		1	1			
		Column N %	1%		1%	14%			

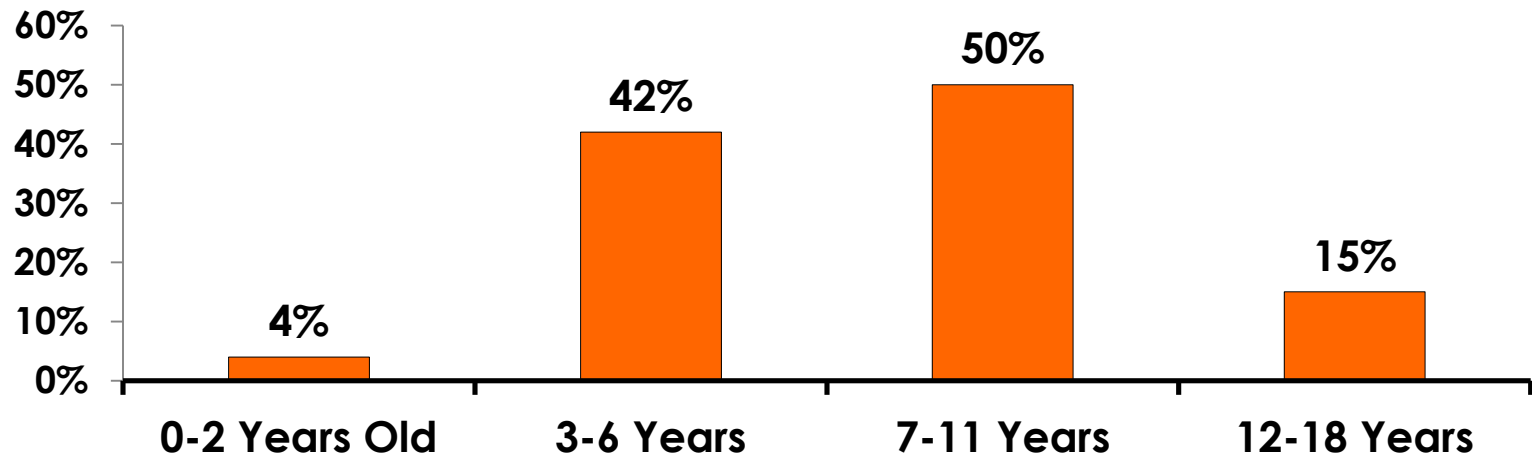
# Travel Companions



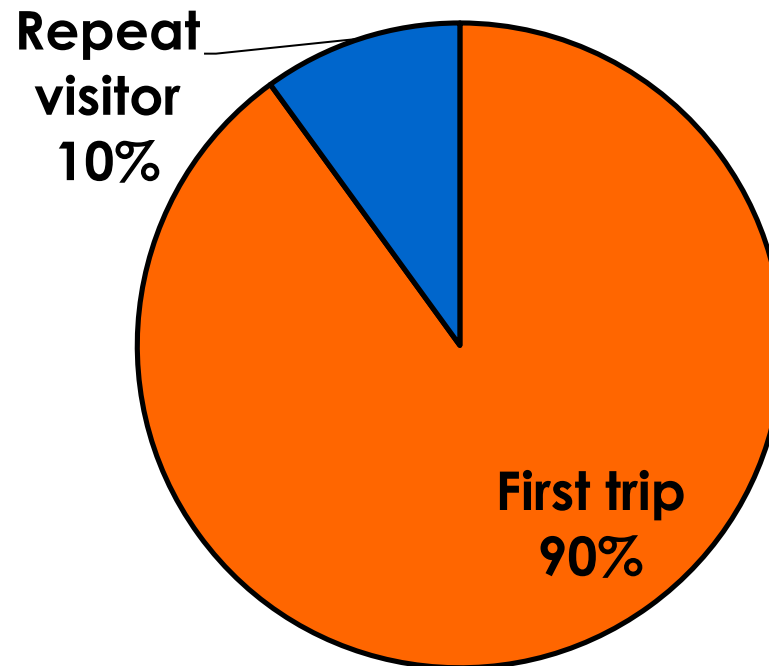
# Number of Children Travel Party

N=26 total respondents traveling with children.

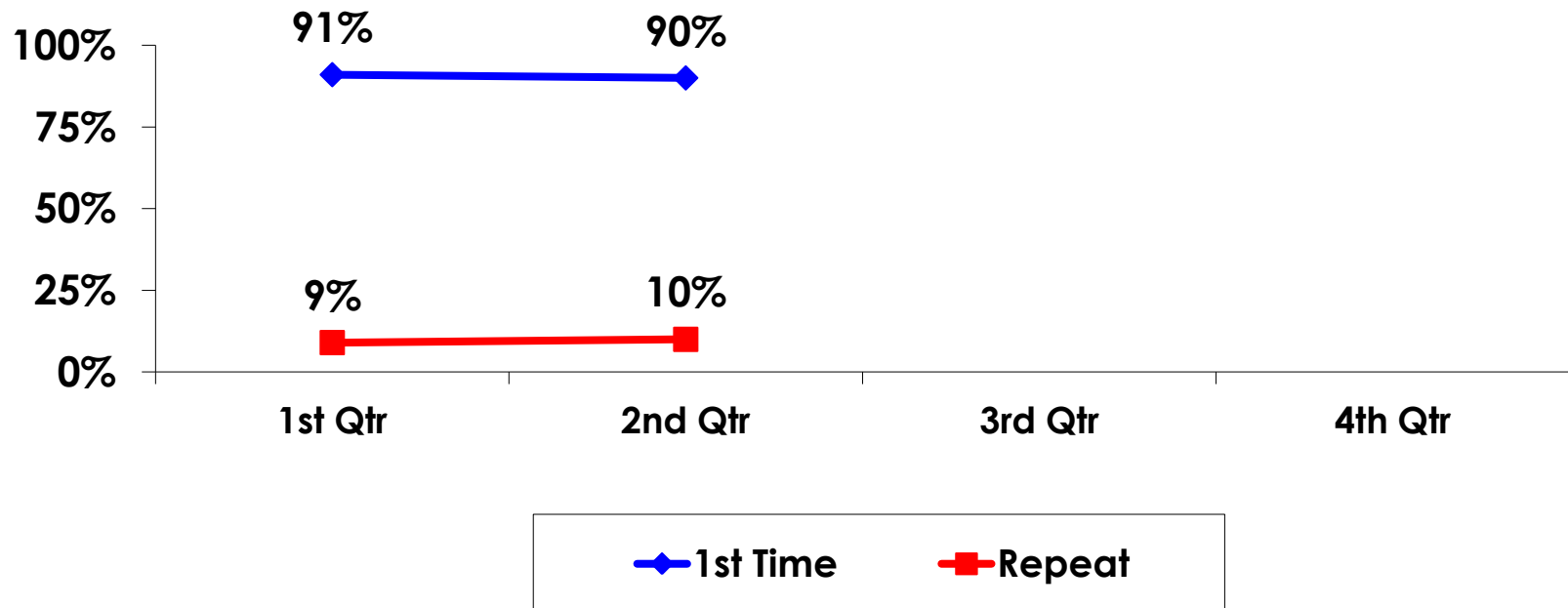
(Of those N=26 respondents, there is a total of 29 children 18 years or younger)



# Prior Trips to Guam



# PRIOR TRIPS TO GUAM



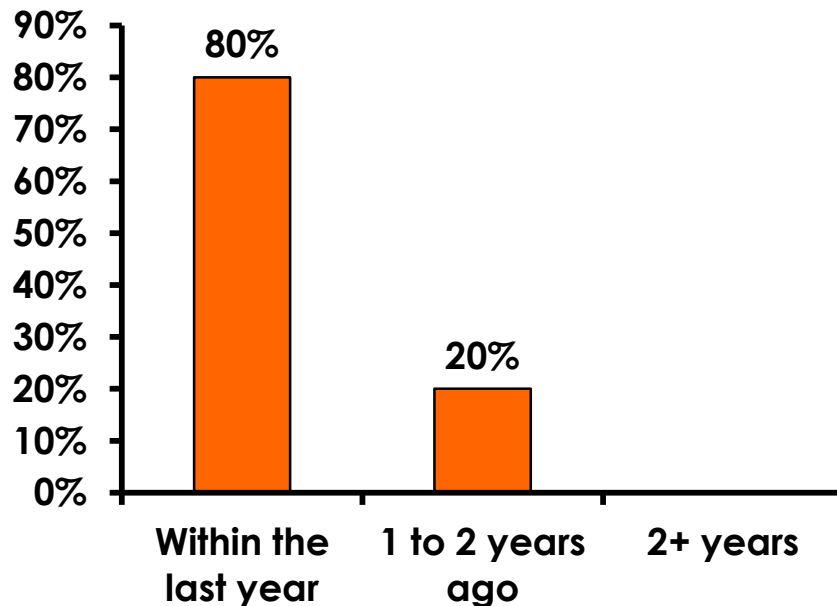
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	77	71	6	
		Column N %	51%	53%	40%	
	Female	Count	73	64	9	
		Column N %	49%	47%	60%	
	Total	Count	150	135	15	
AGE	18-24	Count	8	8		
		Column N %	5%	6%		
	25-34	Count	41	38	3	
		Column N %	28%	28%	20%	
	35-49	Count	59	51	8	
		Column N %	40%	38%	53%	
	50+	Count	41	37	4	
		Column N %	28%	28%	27%	
		Total	Count	149	134	15



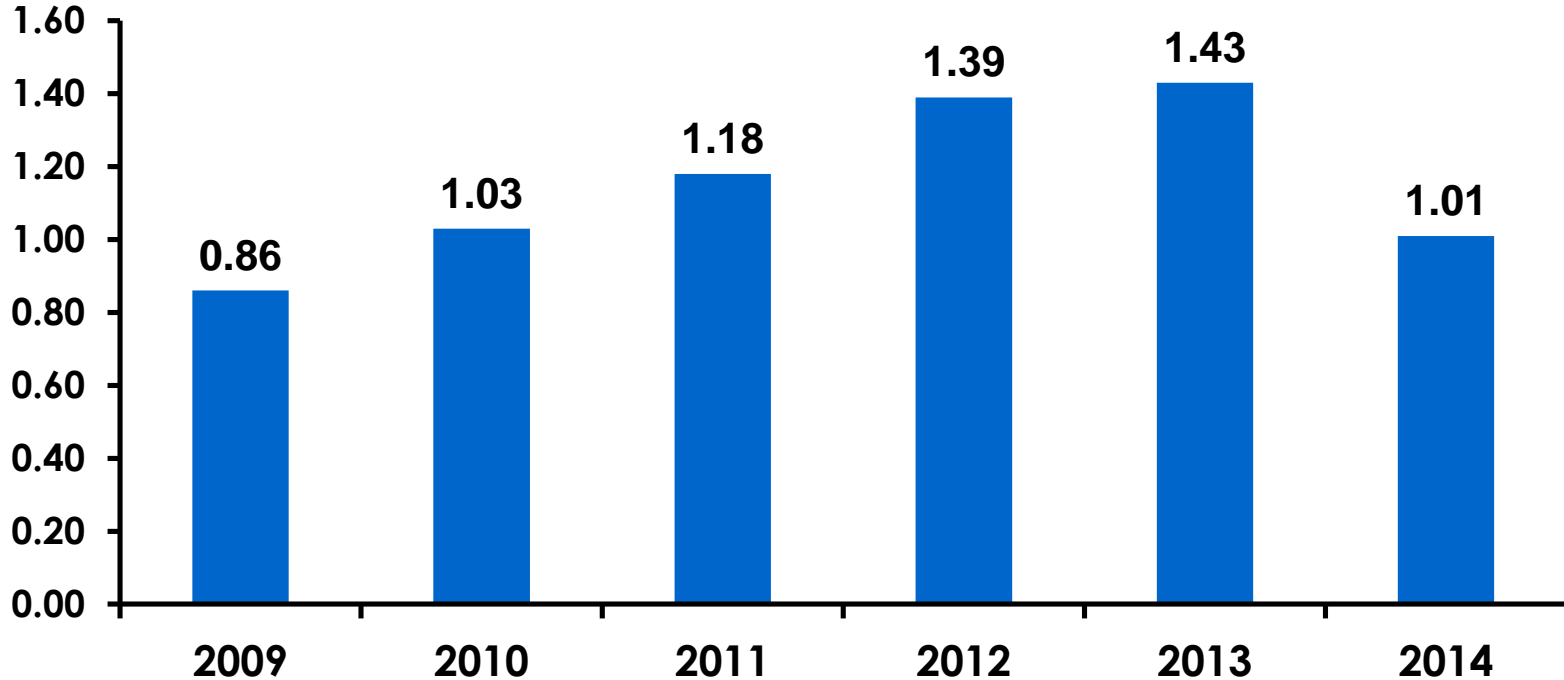
# Repeat Visitors Last Trip

n = 15



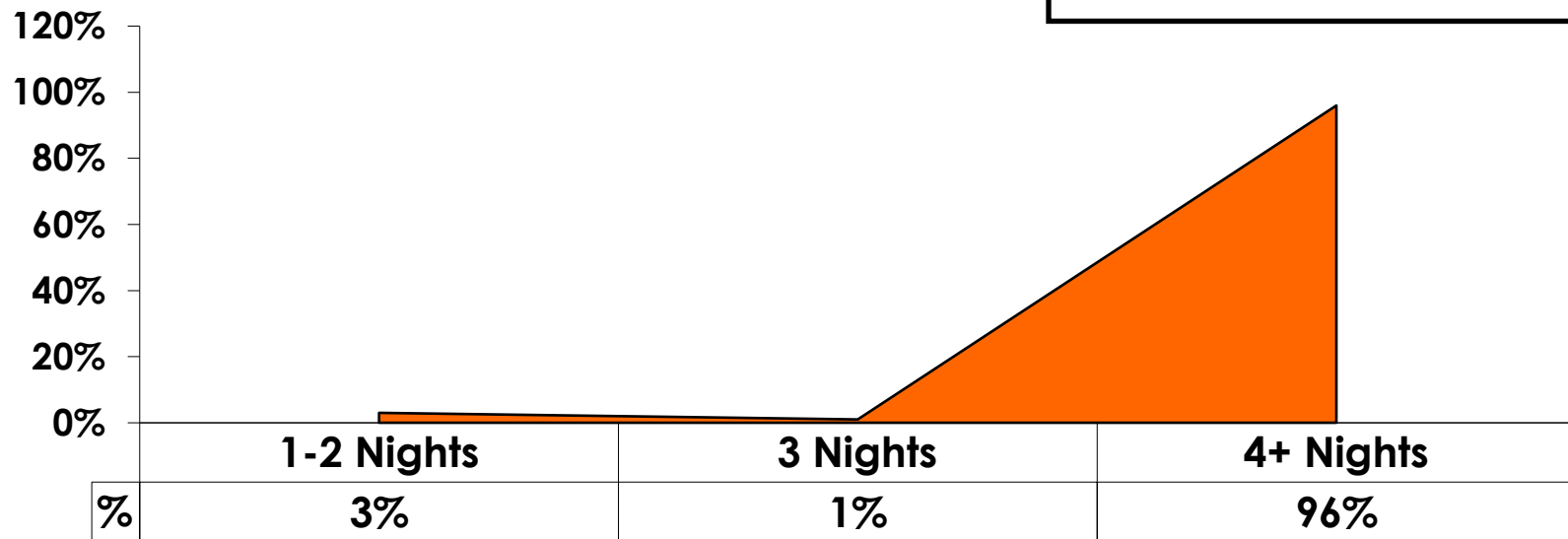
- The average repeat visitor has been to Guam 1.60 times.
- A majority of the repeat visitors have been to Guam within the last year.

# Average Number Overnight Trips (2009-2014) (2 nights or more)

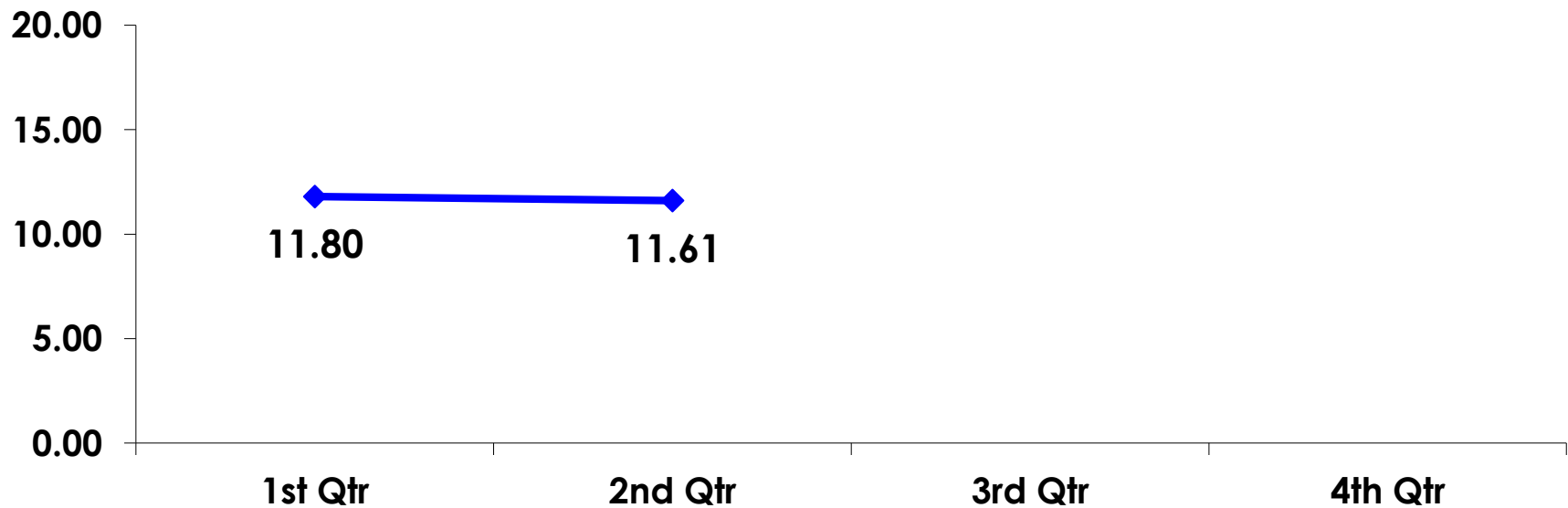


# Length of Stay

Mean = 11.61 Days  
Median = 13.0 Days



# AVG LENGTH OF STAY

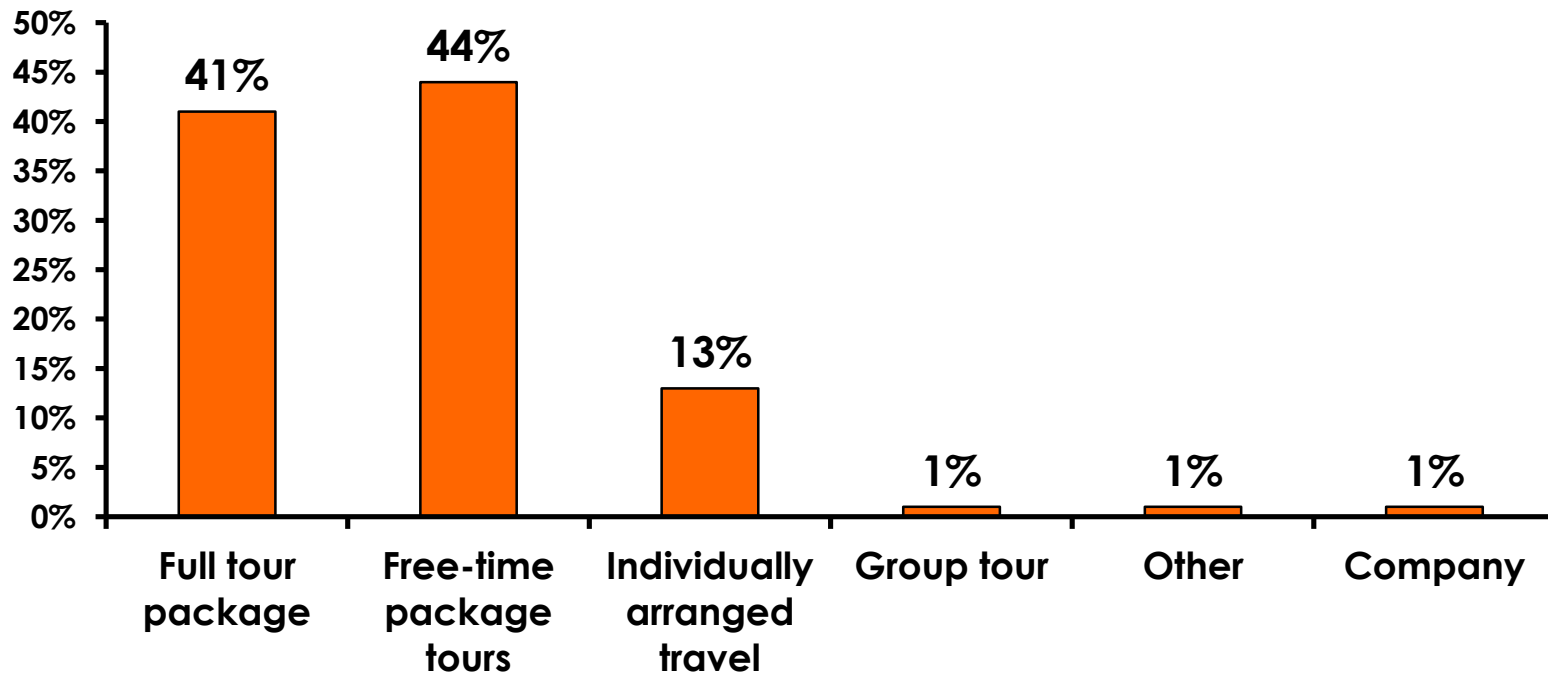


# Occupation by Income

		TOTAL	Q27								
		-	<732,321	732,321-1,098,481	1,098,482-1,464,642	1,464,643-1,830,803	1,830,803-2,263,124	2,263,125-3,661,606	3,661,607+	No Income	
Q26	Self-employed	25%	5%	6%	29%	50%	67%	89%	100%		
	Professional/ Specialist	15%	5%	29%	29%						
	Company: Office/ Non-Mgr	10%	34%	4%							
	Company: Exec	9%		6%	5%	43%	17%	11%			
	Govt: Office/ Non-Mgr	7%	13%	10%			8%				
	Company: Manager	7%	8%	12%	10%						
	Company: Engineer	7%	3%	14%	10%						
	Govt: Executive	5%	5%	4%	5%	7%	8%				
	Teacher	3%	5%	6%							
	Retired	3%	11%								
	Student	2%	3%							100%	
	Homemaker	2%	3%		10%						
	Other	1%		4%							
	Govt: Manager	1%		2%	5%						
	Freelancer	1%	3%								
	Skilled worker	1%	3%								
	Company: Salesperson	1%		2%							
	Total	Count	150	38	49	21	14	12	9	3	1

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



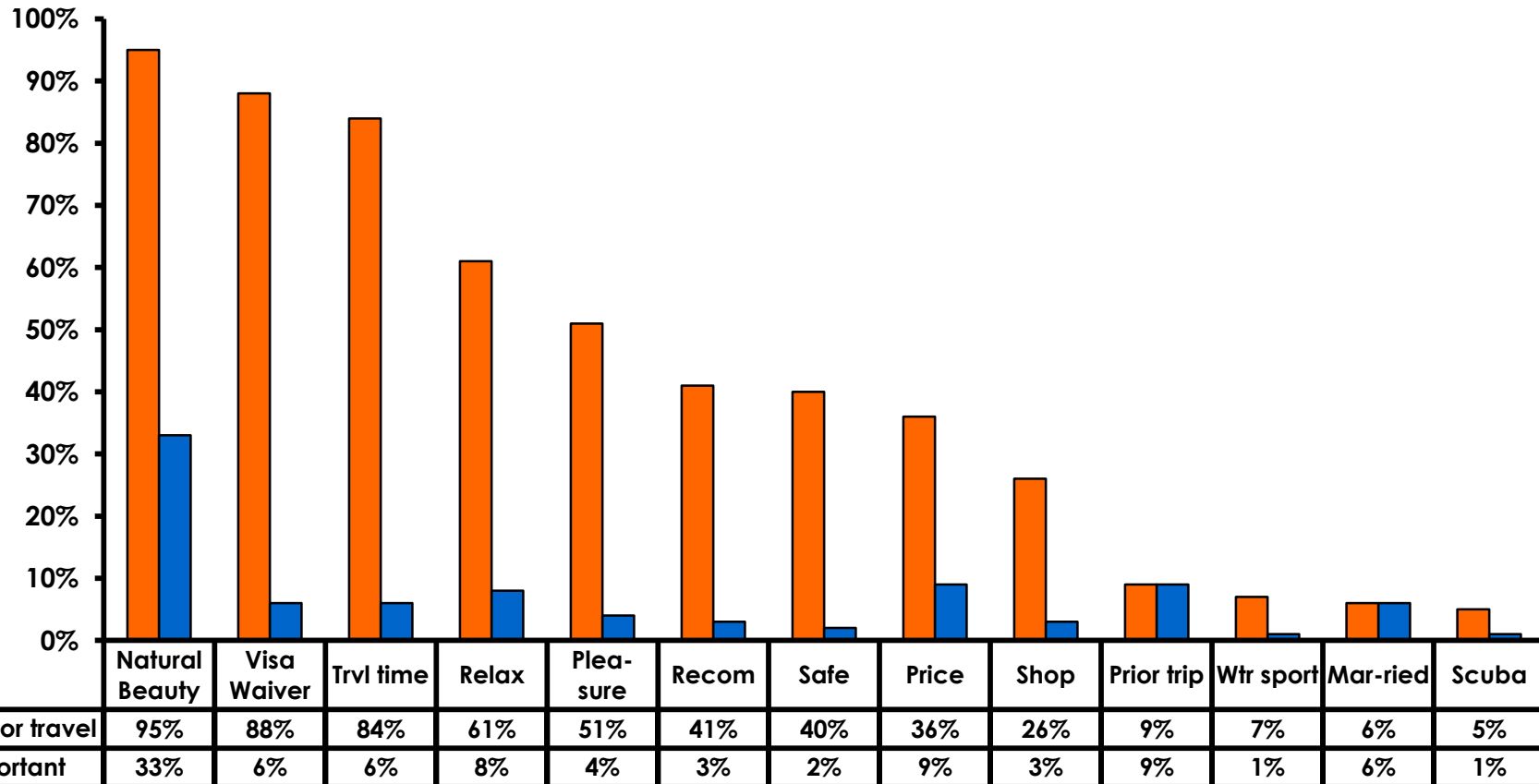
# Accommodation by Income

Average length of stay: 11.61 days

	TOTAL	Q27								
		-	<732,321	732,321-1,098,481	1,098,482-1,464,642	1,464,643-1,830,803	1,830,803-2,263,124	2,563,125-3,661,606	3,661,607+	No Income
Q9										
Bayview Hotel	21%	24%	27%		29%	17%	11%			100%
Fiesta Resort Guam	12%	16%	13%	5%	7%	8%	33%			
Onward Beach Resort	7%	3%	8%	5%	7%	8%	22%			
Tumon Bay Capital Hotel	7%	11%	8%	5%	7%					
Hilton Guam Resort	7%		2%	19%	7%	17%	11%	50%		
Guam Reef & Olive Spa	7%	11%	2%	19%		8%				
Verona Resort & Spa	5%	5%	8%			8%				
Oceanview Hotel	5%	5%	6%	5%		8%				
Hotel Nikko Guam	5%	3%	4%	14%	7%					
Hyatt Regency Guam	5%	3%	6%		7%	17%				
Westin Resort Guam	3%	3%	4%	5%						
Outrigger Guam Resort	3%		4%		14%					
Holiday Resort Guam	3%	8%		5%						
Hotel Santa Fe	2%	3%		5%		8%				
Sheraton Laguna Guam	2%			5%	7%		11%			
Condo	1%	5%								
Royal Orchid Guam	1%		2%	5%						
Guam Marriott Resort	1%						11%	50%		
PIC Club	1%		2%	5%						
Home stay/ friend/ relative	1%	3%								
Apartment	1%				7%					
Pacific Bay Hotel	1%		2%							
Total	Count	148	38	48	21	14	12	9	2	1



# Travel Motivation - Top Responses



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# Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
  - Price and
  - Prior trip
- are the primary reasons for visiting during this period.

# Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty	95%	88%	93%	95%	98%	92%	97%	
	No Visa required	88%	63%	90%	90%	90%	91%	85%	
	Short travel time	84%	50%	80%	90%	88%	88%	79%	
	Relax	61%	50%	61%	63%	63%	60%	63%	
	Pleasure	51%	25%	46%	54%	56%	52%	49%	
	Recomm- friend/family/trvl agnt	41%	50%	39%	46%	37%	38%	45%	
	Safe	40%	38%	39%	42%	39%	32%	48%	
	Price	36%	38%	56%	31%	24%	29%	44%	
	Shopping	26%	25%	29%	29%	17%	18%	34%	
	Previous trip	9%		7%	12%	10%	8%	11%	
	Water sports	7%	38%	10%	3%	2%	8%	5%	
	Married/ Attn wedding	6%	13%	2%	10%	2%	12%		
	Scuba	5%	25%	7%	2%	5%	4%	7%	
	Other	4%	13%	5%	2%	5%	1%	7%	
	Company/ Business Trip	4%		7%	2%	2%	5%	3%	
	Visit friends/ Relatives	3%	13%	2%	2%	5%	3%	4%	
	Honeymoon	1%	13%		2%		3%		
	Company Sponsored	1%	13%		2%			3%	
	Organized sports	1%			2%			1%	
	Total	Count	150	8	41	59	41	77	73

# Motivation by Income

		TOTAL	Q27								
		-	<732,321	732,321-1,098,481	1,098,482-1,464,642	1,464,643-1,830,803	1,830,803-2,263,124	2,263,125-3,661,606	3,661,607+	No Income	
Q5A	Natural beauty	95%	97%	94%	95%	100%	92%	89%	100%		
	No Visa required	88%	79%	94%	95%	86%	75%	100%	100%		
	Short travel time	84%	79%	92%	90%	71%	67%	89%	100%		
	Relax	61%	71%	67%	43%	64%	42%	56%	67%	100%	
	Pleasure	51%	34%	55%	81%	29%	50%	78%	33%		
	Recomm- friend/family/trvl agnt	41%	45%	51%	38%	50%	8%	22%		100%	
	Safe	40%	45%	43%	48%	36%	25%	11%	67%		
	Price	36%	42%	55%	29%	21%	8%				
	Shopping	26%	21%	29%	33%	14%	25%	44%		100%	
	Previous trip	9%	3%	6%	19%	14%	17%	11%	33%		
	Water sports	7%	3%	6%		14%	8%	11%			
	Married/ Attn wedding	6%	3%		10%		17%	33%	33%		
	Scuba	5%	11%	6%	5%						
	Other	4%	5%	2%	5%	14%					
	Company/ Business Trip	4%	3%	4%	5%		8%				
	Visit friends/ Relatives	3%	3%	2%			8%	11%		100%	
	Honeymoon	1%		2%				11%			
	Company Sponsored	1%	5%								
	Organized sports	1%				7%					
	Total	Count	150	38	49	21	14	12	9	3	1

# SECTION 3 **EXPENDITURES**

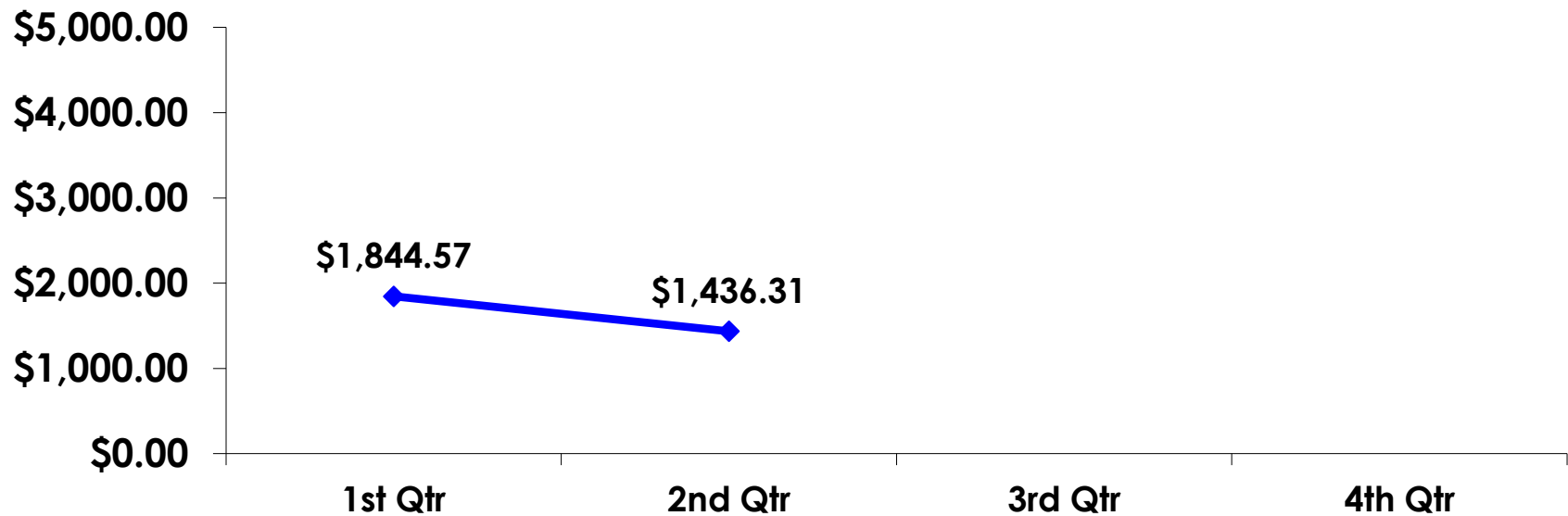
# Prepaid Expenditures

Ruble 35.34 /US\$1

- \$2,853.98 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$11,177 = maximum (highest amount recorded for the entire sample)
- \$1,436.31 = overall mean average per person prepaid expenditures

# PREPAID EXPENDITURES

## Per Person



YTD=\$1,641.12

# Breakdown of Prepaid Expenditures

## Rub 35.34=\$1

**(Filter: Only those who responded/  
Per Travel Party)**

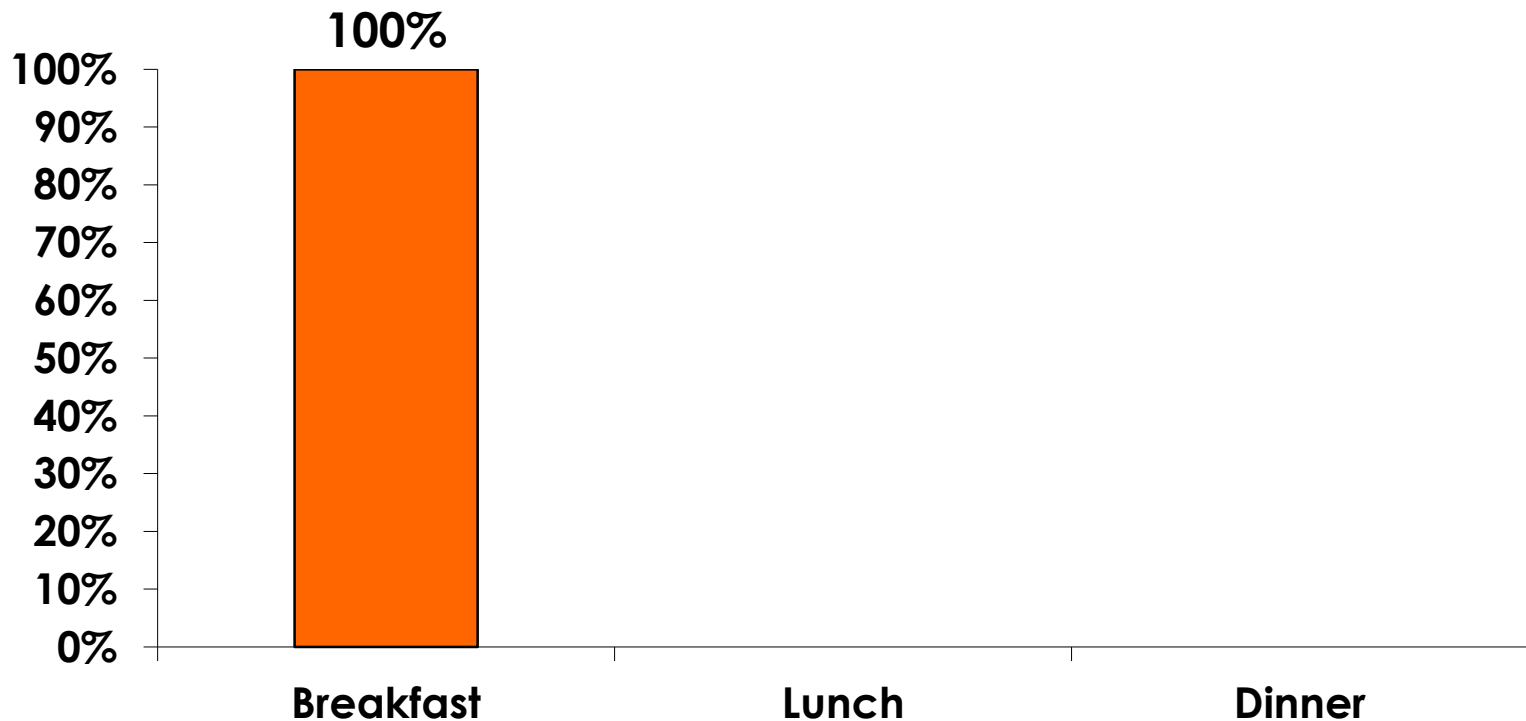
	MEAN \$
Air & Accommodation package only	\$2,288.51
Air & Accommodation w/ daily meal package	\$3,643.58
Air only	\$1,337.01
Accommodation only	\$1,245.05
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation – Russia	\$-
Ground transportation – Guam	\$-
Optional tours/ activities	\$-
Other expenses	\$848.90
<b>Total Prepaid</b>	<b>\$2,853.98</b>



# PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n= 1

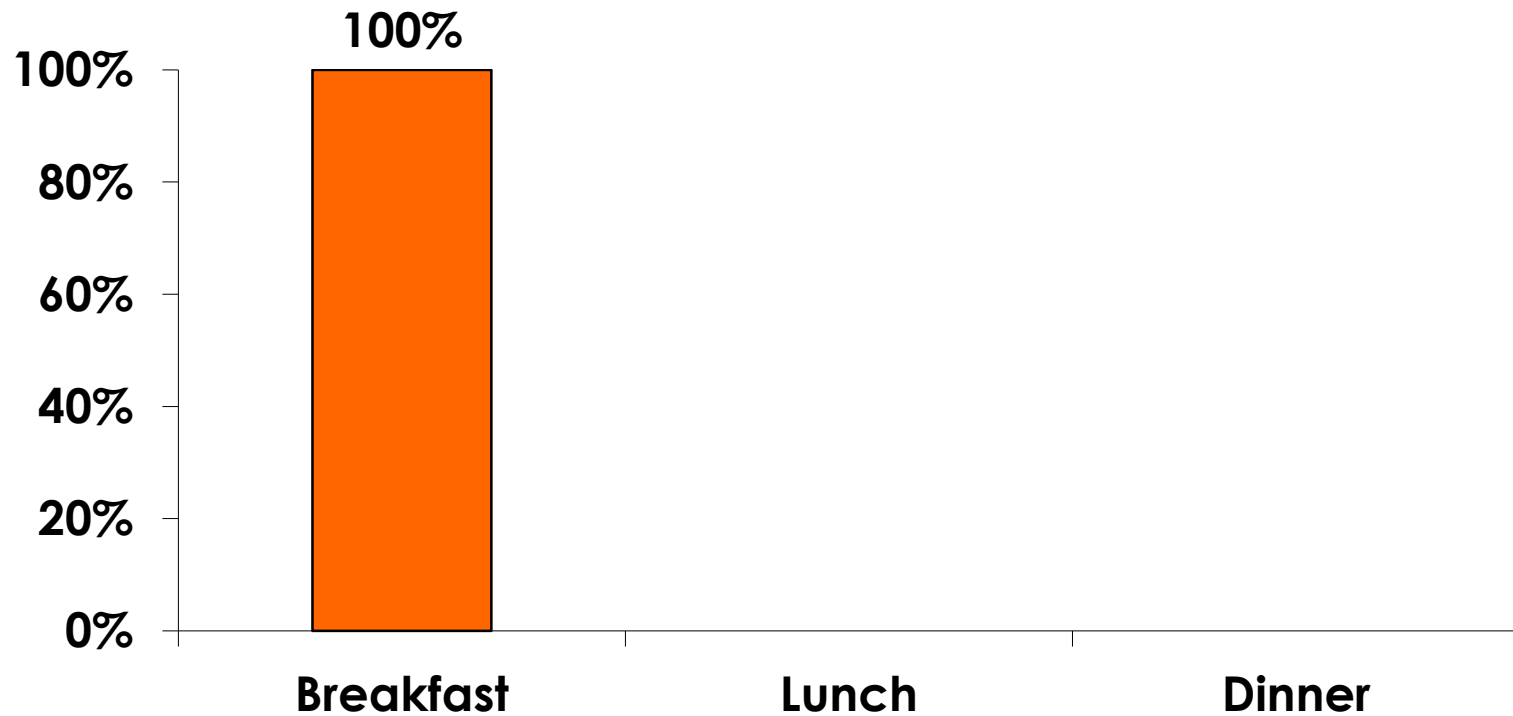


Mean=\$3,643.58 per travel party

# PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

n=1



Mean=\$ No Responses

# PREPAID GROUND TRANSPORTATION

**n=x**



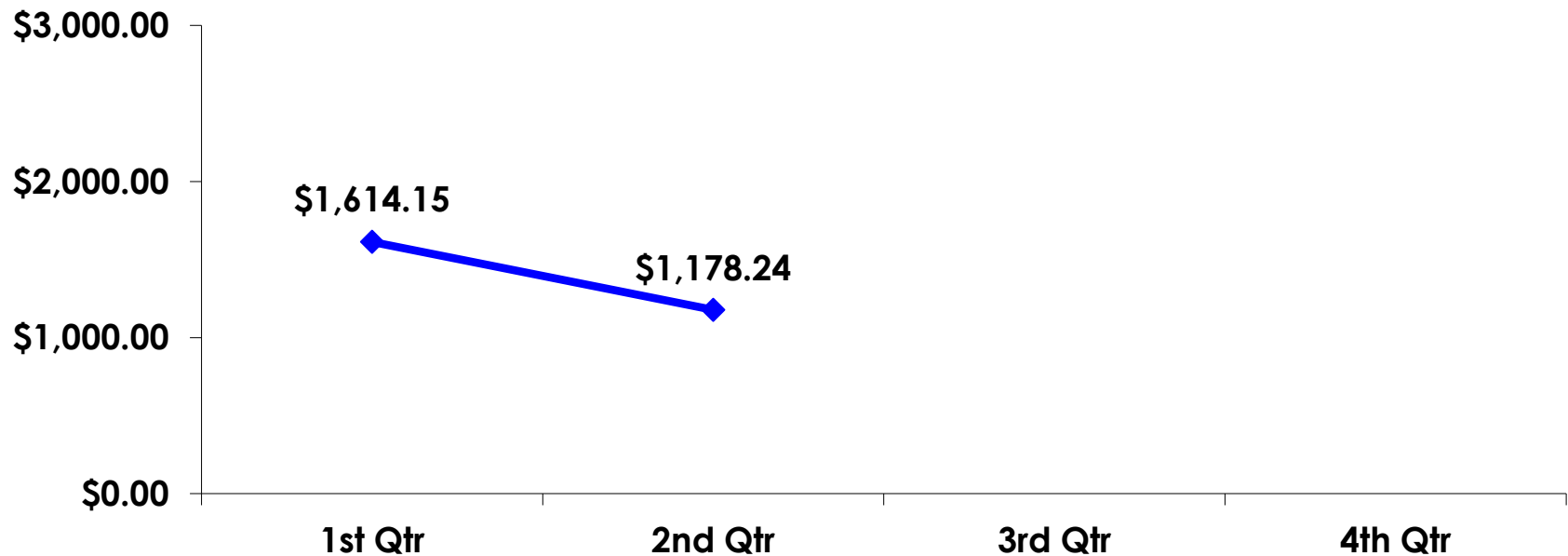
**Mean=\$xxx per travel party**

# On-Island Expenditures

- \$2,138.61 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$20,000 = Maximum (highest amount recorded for the entire sample)
- \$1,178.24 = overall mean average per person on-island expenditure

# ON-ISLAND EXPENDITURES

## Per Person



YTD = \$1,396.91

# Total On-Island Expenditure by Gender & Age

	TOTAL	GENDER		GENDER								
		-	Male	Female	Male				Female			
					AGE				AGE			
					18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
ONISLE	Mean	\$1,178.24	\$1,168.43	\$1,188.58	\$533.33	\$991.10	\$1,259.44	\$1,252.86	\$1,214.67	\$1,058.23	\$1,111.54	\$1,425.58
	Median	\$948	\$905	\$1,000	\$700	\$605	\$1,000	\$905	\$840	\$900	\$805	\$1,000
	Minimum	\$0	\$0	\$275	\$0	\$114	\$500	\$425	\$600	\$383	\$275	\$600
	Maximum	\$6,667	\$6,667	\$4,000	\$900	\$5,000	\$6,667	\$5,000	\$3,000	\$2,600	\$3,000	\$4,000

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$103.05	\$126.75	\$78.04	\$35.00	\$37.00	\$150.00	\$117.32
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$77.05	\$75.03	\$79.18	\$162.50	\$108.10	\$67.29	\$45.24
	Median	\$0	\$0	\$0	\$25	\$100	\$0	\$0
F&B RESTRNT	Mean	\$541.36	\$574.68	\$506.22	\$506.25	\$584.49	\$506.27	\$532.20
	Median	\$450	\$450	\$450	\$450	\$350	\$450	\$480
OPT TOUR	Mean	\$252.13	\$258.35	\$245.58	\$300.00	\$218.66	\$252.37	\$269.88
	Median	\$250	\$240	\$280	\$290	\$250	\$250	\$280
GIFT- SELF	Mean	\$711.97	\$953.90	\$456.78	\$200.00	\$391.95	\$933.56	\$781.59
	Median	\$350	\$500	\$300	\$150	\$300	\$500	\$350
GIFT- OTHER	Mean	\$280.87	\$307.60	\$252.67	\$182.50	\$224.27	\$286.44	\$331.10
	Median	\$200	\$200	\$200	\$130	\$200	\$200	\$200
TRANS	Mean	\$84.27	\$91.62	\$76.51	\$70.00	\$81.10	\$106.10	\$60.85
	Median	\$0	\$20	\$0	\$25	\$0	\$60	\$0
OTHER	Mean	\$82.47	\$71.04	\$94.52	\$58.75	\$97.44	\$76.78	\$82.32
	Median	\$0	\$0	\$0	\$5	\$0	\$0	\$0
TOTAL	Mean	\$2,138.61	\$2,479.09	\$1,779.47	\$1,515.00	\$1,743.44	\$2,361.02	\$2,265.61
	Median	\$1,505	\$1,850	\$1,440	\$1,500	\$1,300	\$1,850	\$1,700

# On-Island Expenditures

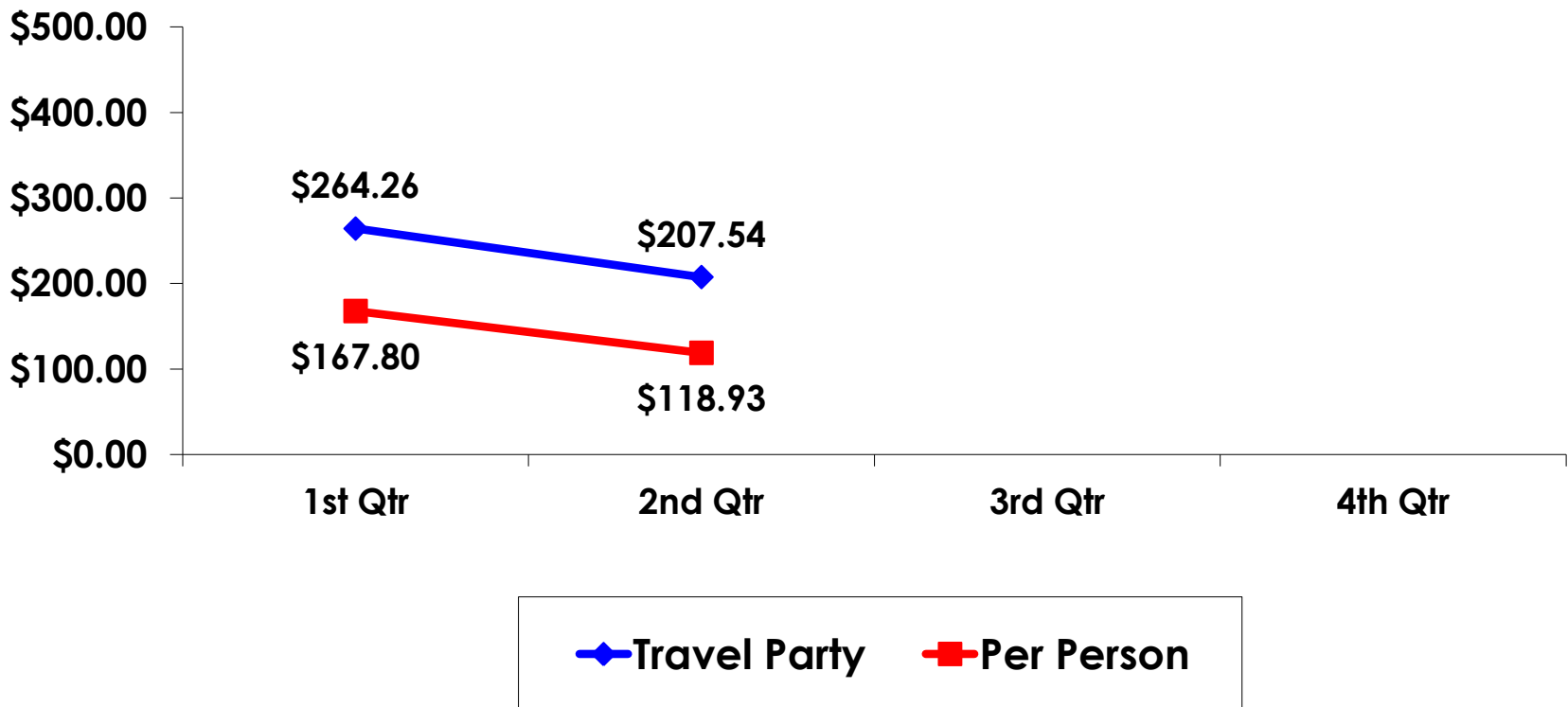
## First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$103.05	\$85.24	\$263.33
	Median	\$0	\$0	\$250
F&B FF/STORE	Mean	\$77.05	\$84.13	\$13.33
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$541.36	\$550.77	\$456.67
	Median	\$450	\$450	\$500
OPT TOUR	Mean	\$252.13	\$259.11	\$189.33
	Median	\$250	\$280	\$100
GIFT- SELF	Mean	\$711.97	\$752.56	\$346.67
	Median	\$350	\$350	\$200
GIFT- OTHER	Mean	\$280.87	\$282.44	\$266.67
	Median	\$200	\$200	\$300
TRANS	Mean	\$84.27	\$74.93	\$168.33
	Median	\$0	\$0	\$150
OTHER	Mean	\$82.47	\$88.15	\$31.33
	Median	\$0	\$0	\$0
TOTAL	Mean	\$2,138.61	\$2,183.01	\$1,739.00
	Median	\$1,505	\$1,500	\$1,700



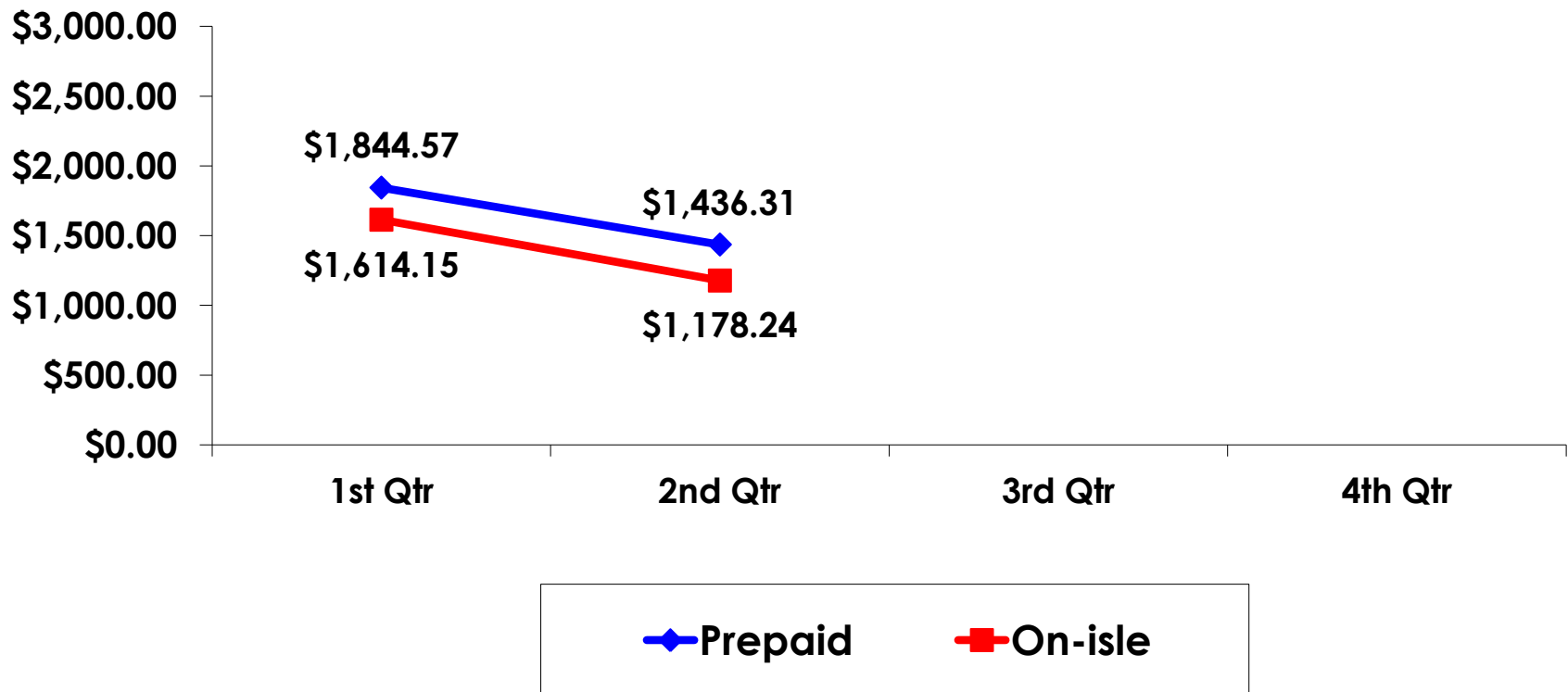
# ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$236.09      Per Person YTD = \$143.53



# PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$1,641.12    On-Isle YTD = \$1,396.91

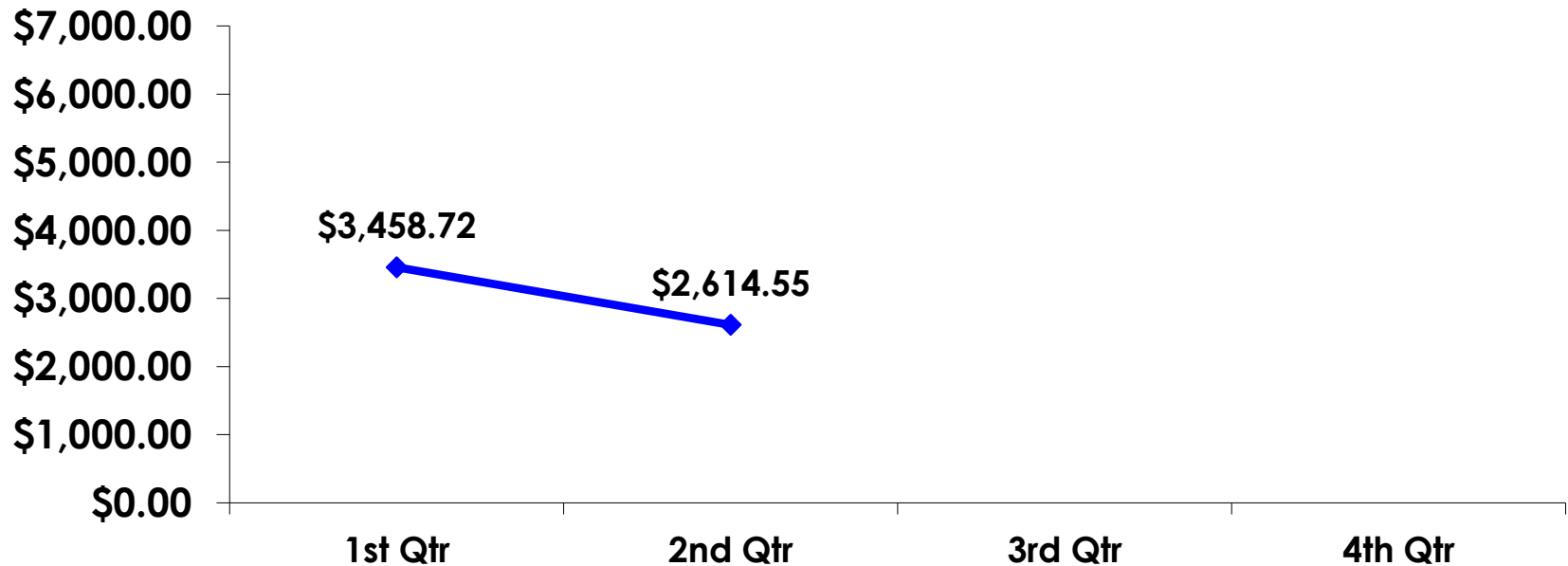


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# Total Expenditures Per Person (Prepaid & On-Island)

- \$2,614.55 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,392 = Maximum (highest amount recorded for the entire sample)

# TOTAL EXPENDITURES Per Person



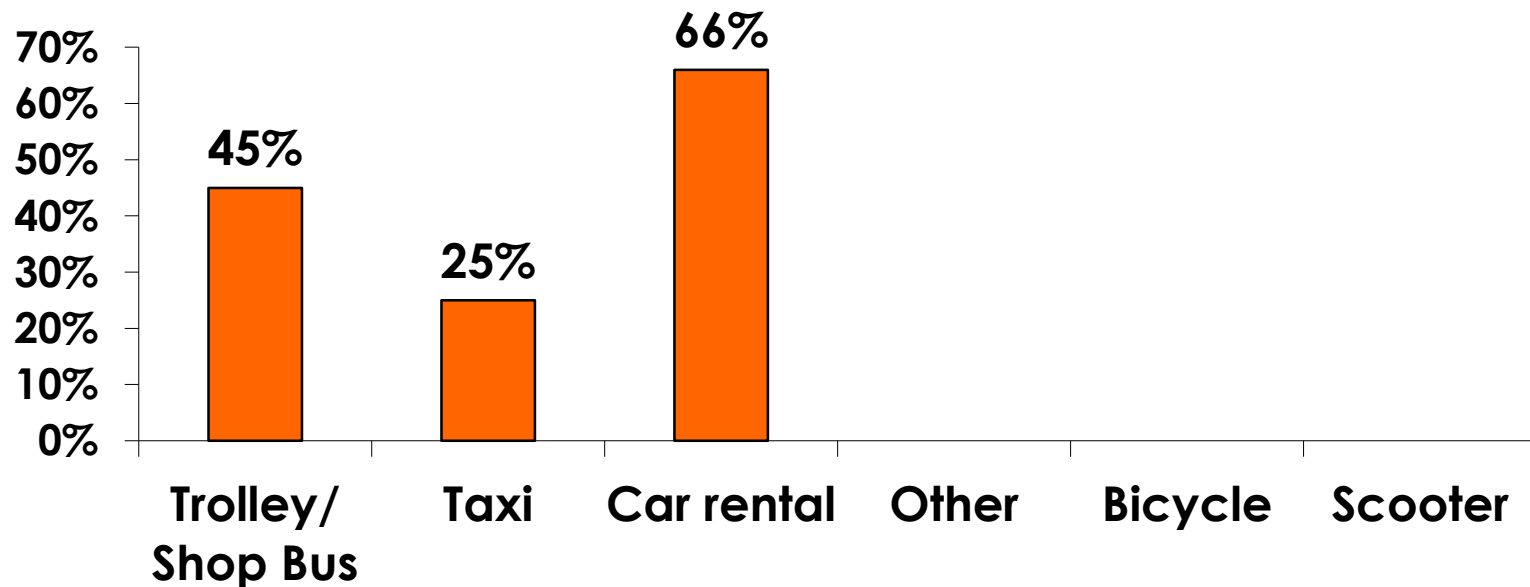
YTD=\$3,038.03

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$103.05
Food & beverage in fast food restaurant/convenience store	\$77.05
Food & beverage at restaurants or drinking establishments outside a hotel	\$541.36
Optional tours and activities	\$252.13
Gifts/ souvenirs for yourself/companions	\$711.97
Gifts/ souvenirs for friends/family at home	\$280.87
Local transportation	\$84.27
Other expenses not covered	\$82.47
<b>Average Total</b>	<b>\$2,138.61</b>

# Local Transportation

n=64



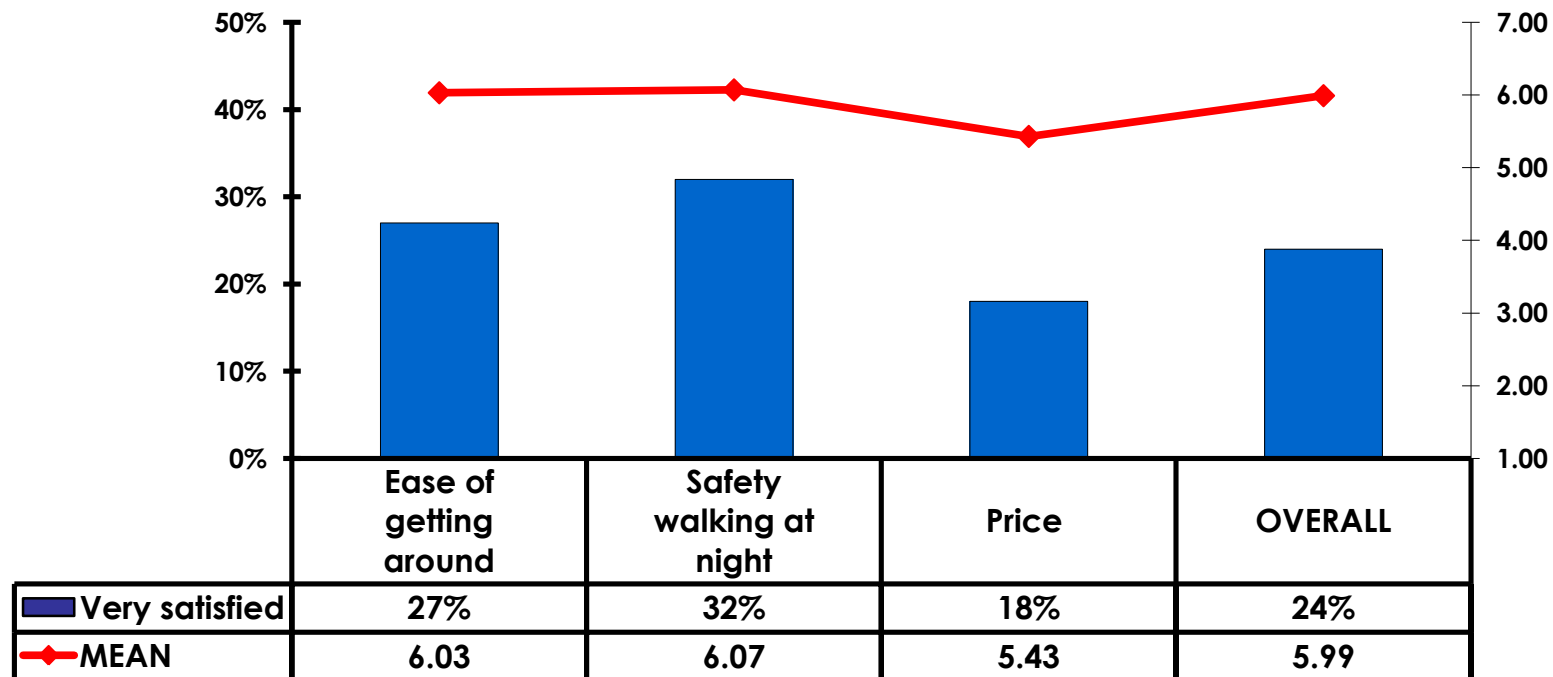
Mean=\$84.27 per travel party

# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied

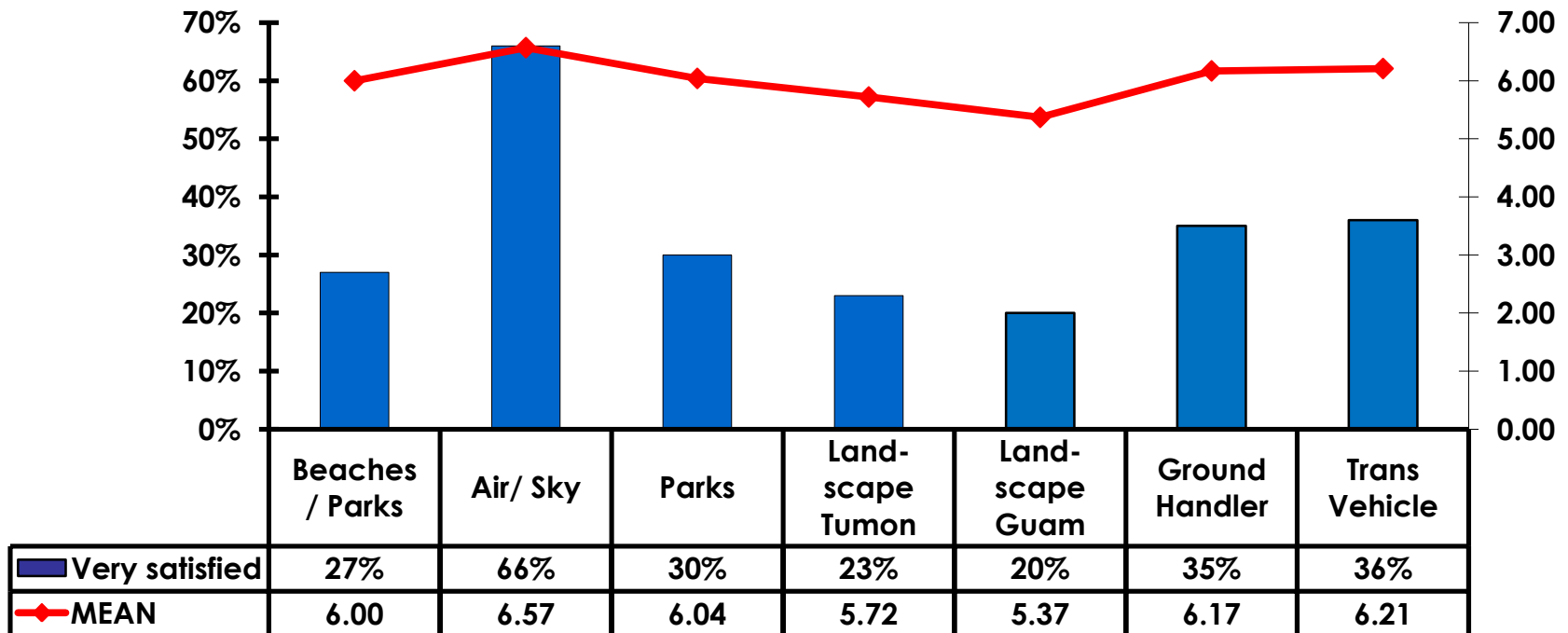




# Satisfaction Quality/ Cleanliness

7pt Rating Scale

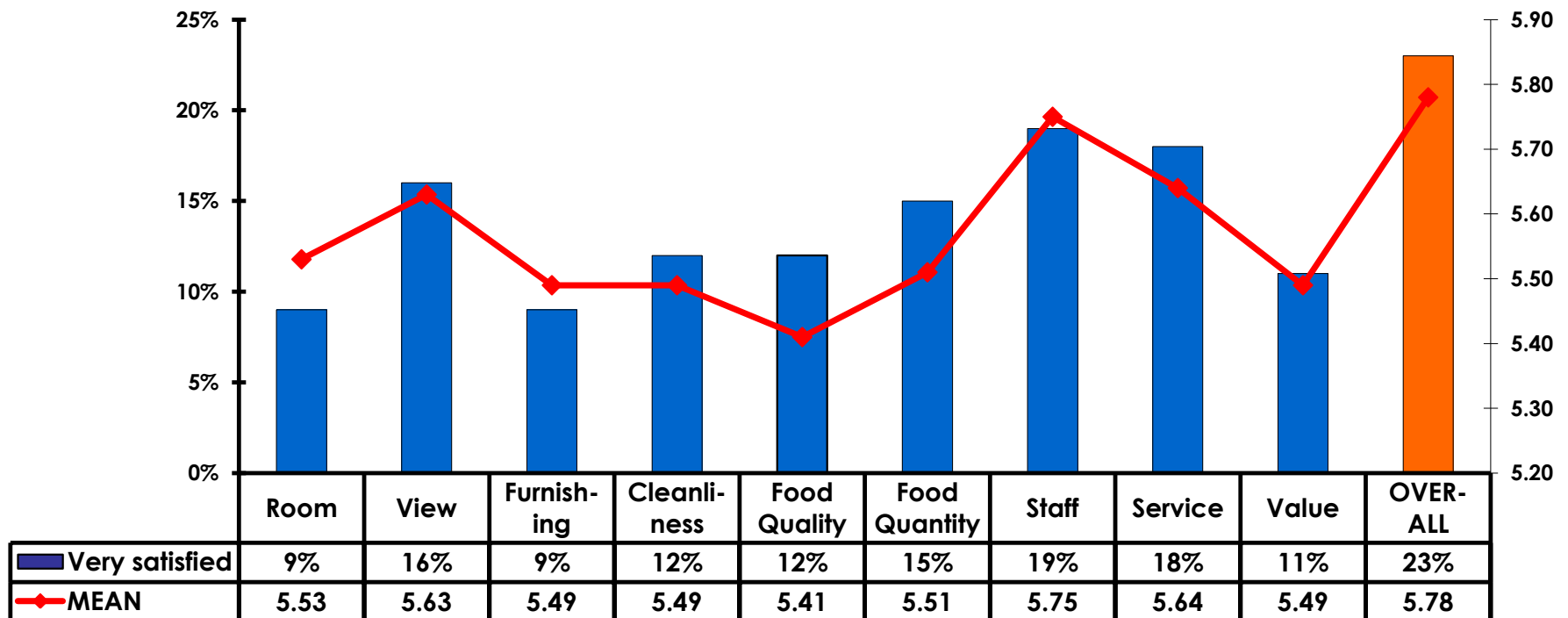
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

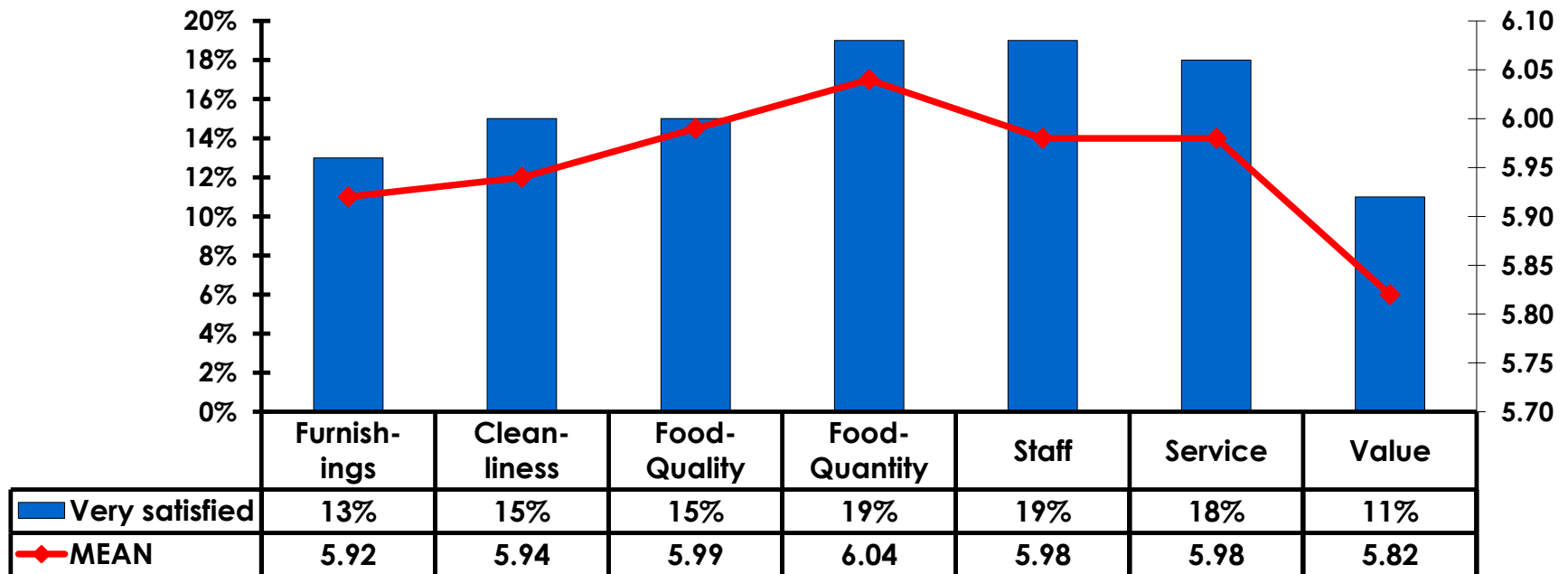
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

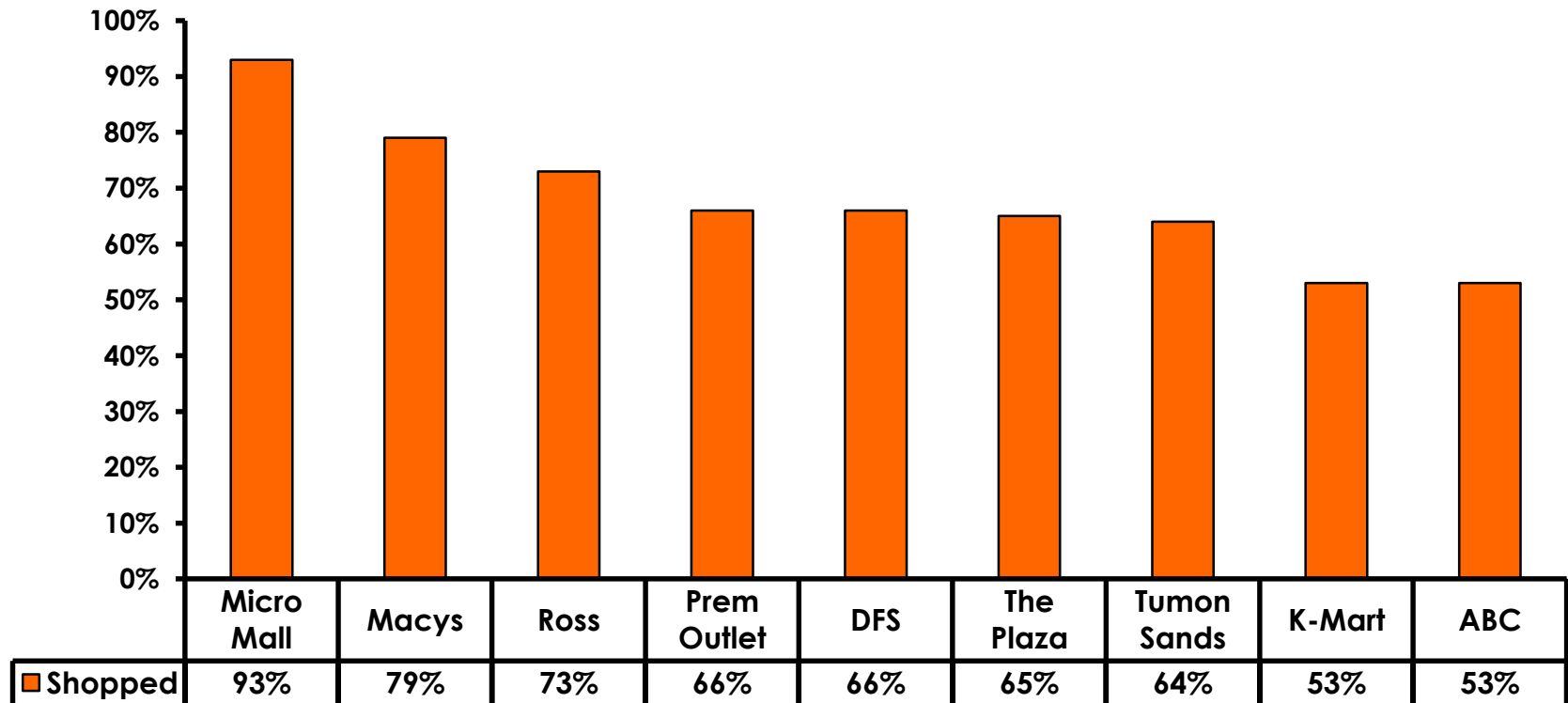
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

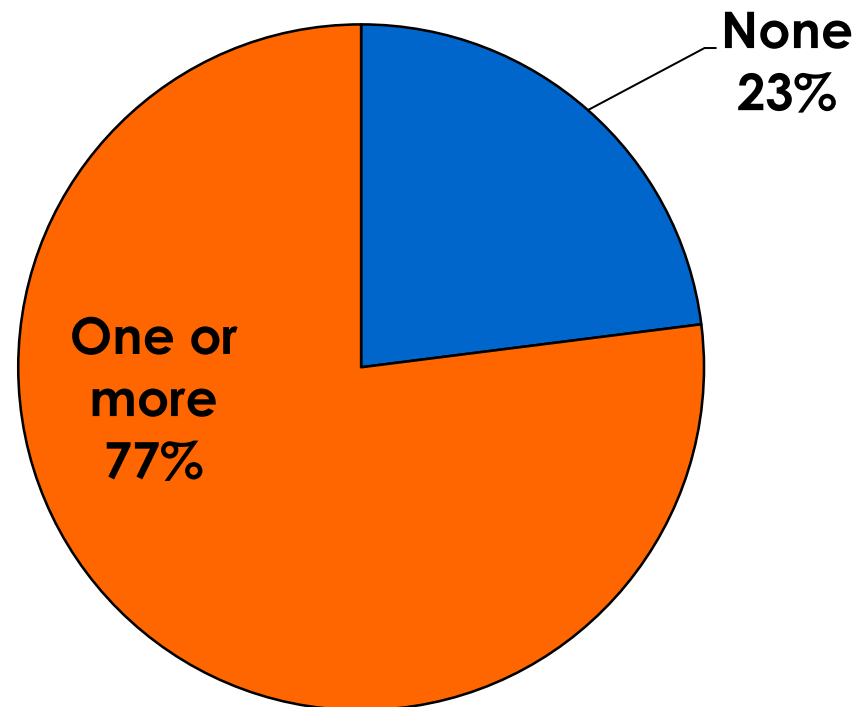
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>53%</b>	Score of 6 to 7 = <b>53%</b>
Score of 4 to 5 = <b>44%</b>	Score of 4 to 5 = <b>42%</b>
Score 1 to 3 = <b>3%</b>	Score 1 to 3 = <b>6%</b>
<b>MEAN = 5.53</b>	<b>MEAN = 5.47</b>

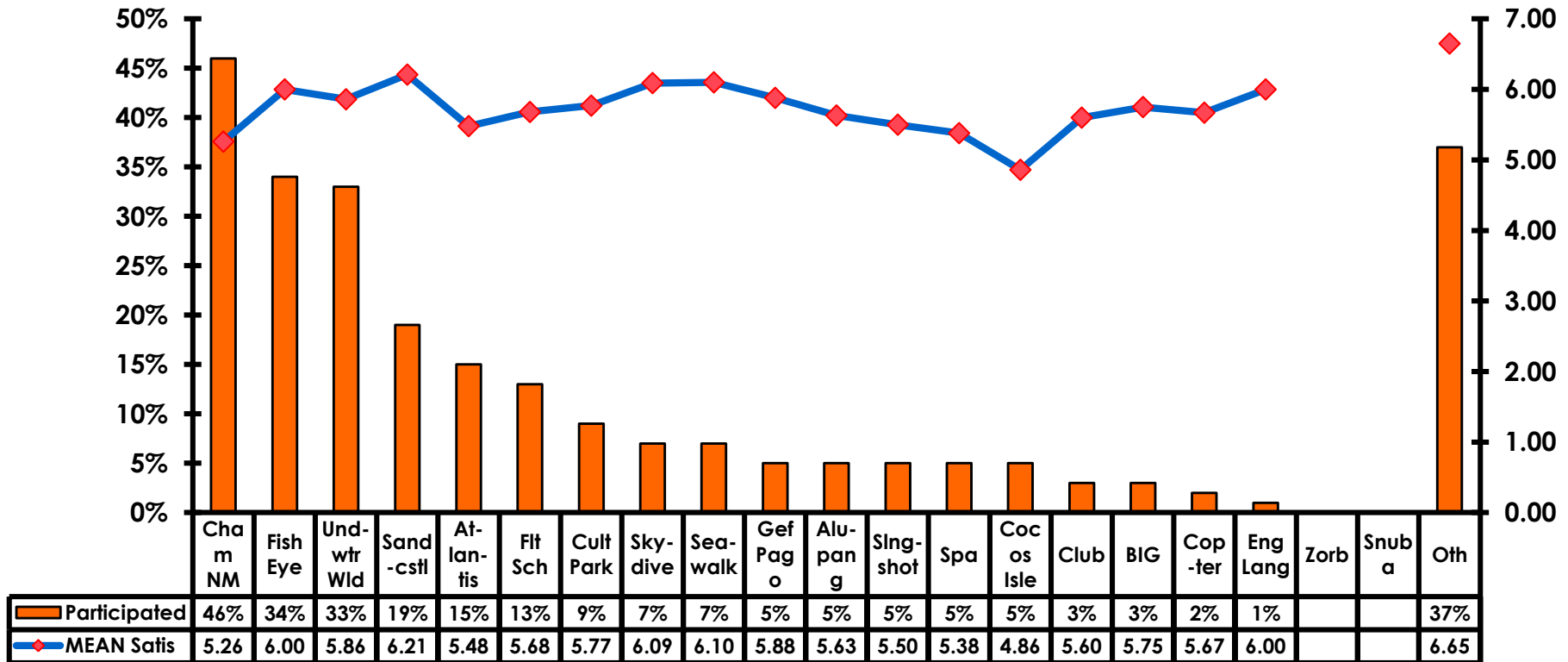
# Optional Tour Participation

- Average number of tours participated in is 2.63



# Optional Tours

## Participation & Satisfaction



# Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = <b>77%</b>	Score of 6 to 7 = <b>40%</b>
Score of 4 to 5 = <b>17%</b>	Score of 4 to 5 = <b>45%</b>
Score 1 to 3 = <b>5%</b>	Score 1 to 3 = <b>16%</b>
<b>MEAN = 6.03</b>	<b>MEAN = 5.07</b>



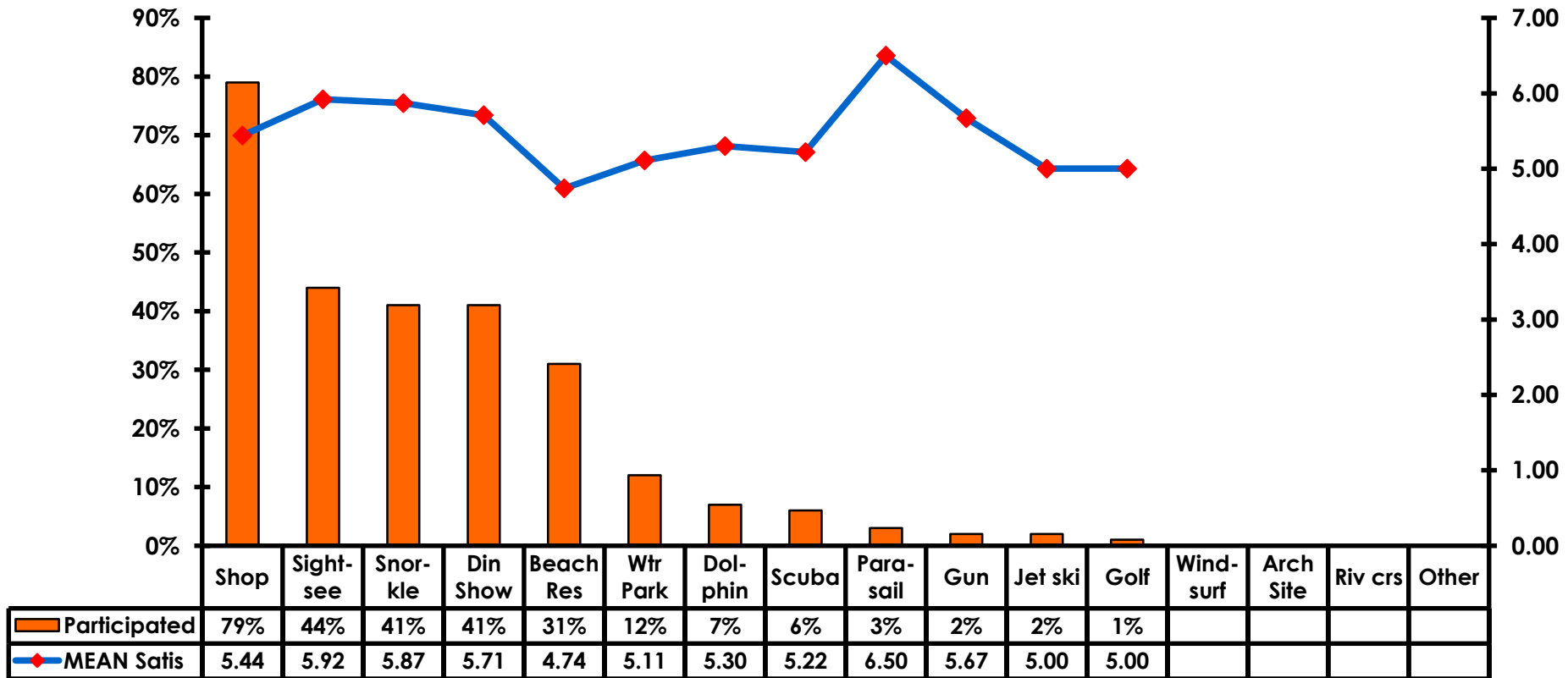
# Night Tours Satisfaction

7pt Rating Scale

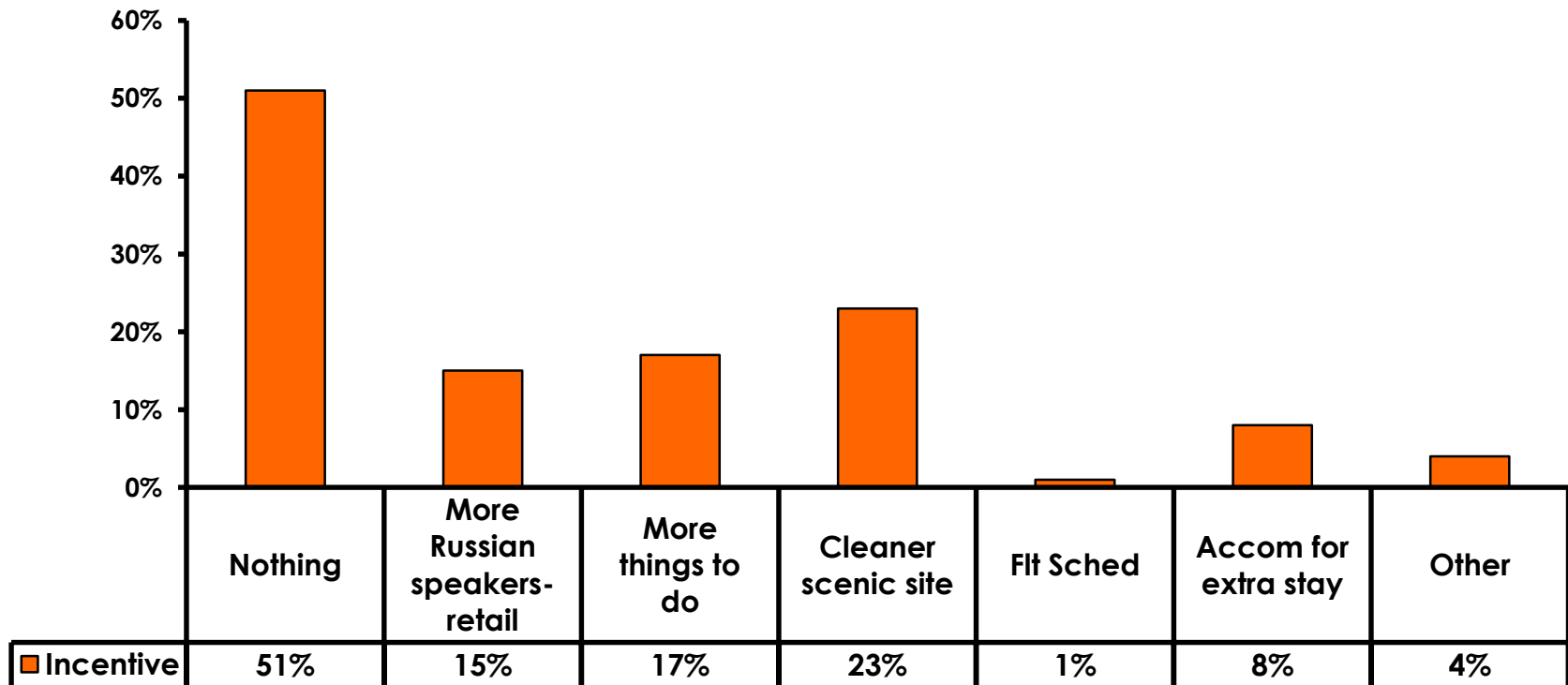
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>50%</b>	Score of 6 to 7 = <b>43%</b>
Score of 4 to 5 = <b>39%</b>	Score of 4 to 5 = <b>45%</b>
Score 1 to 3 = <b>12%</b>	Score 1 to 3 = <b>12%</b>
<b>MEAN = 5.21</b>	<b>MEAN = 5.07</b>

# Satisfaction with Other Activities



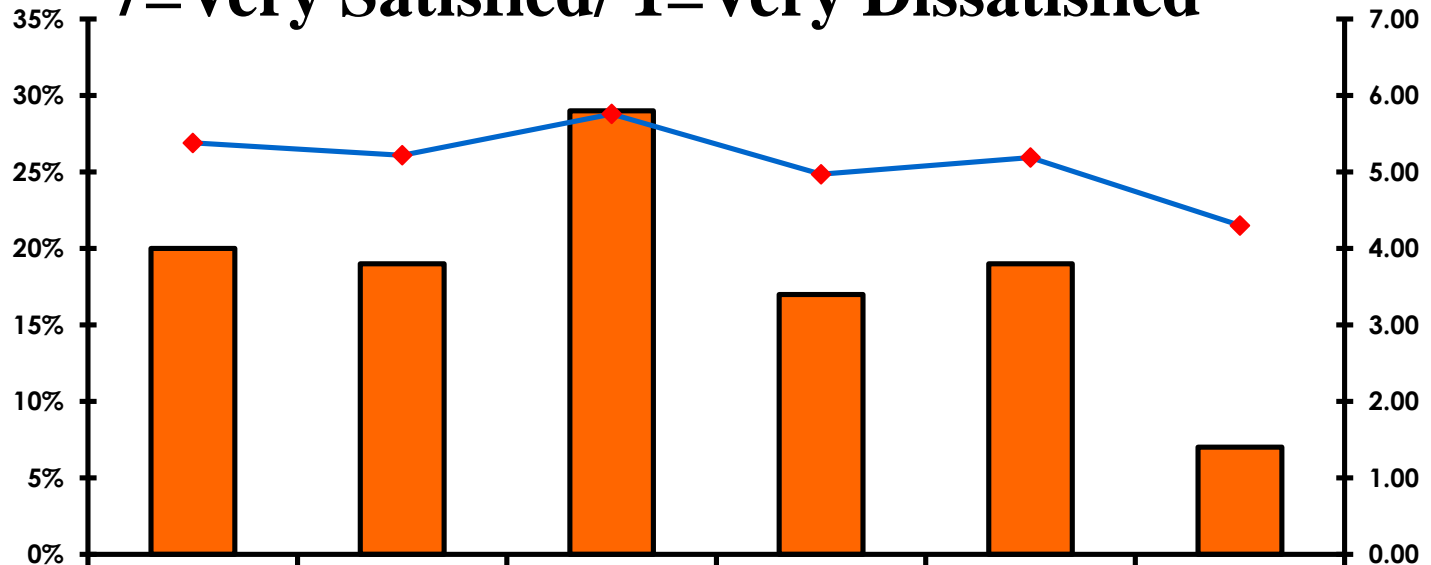
# What would it take to make Guam more enjoyable for families?



# On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

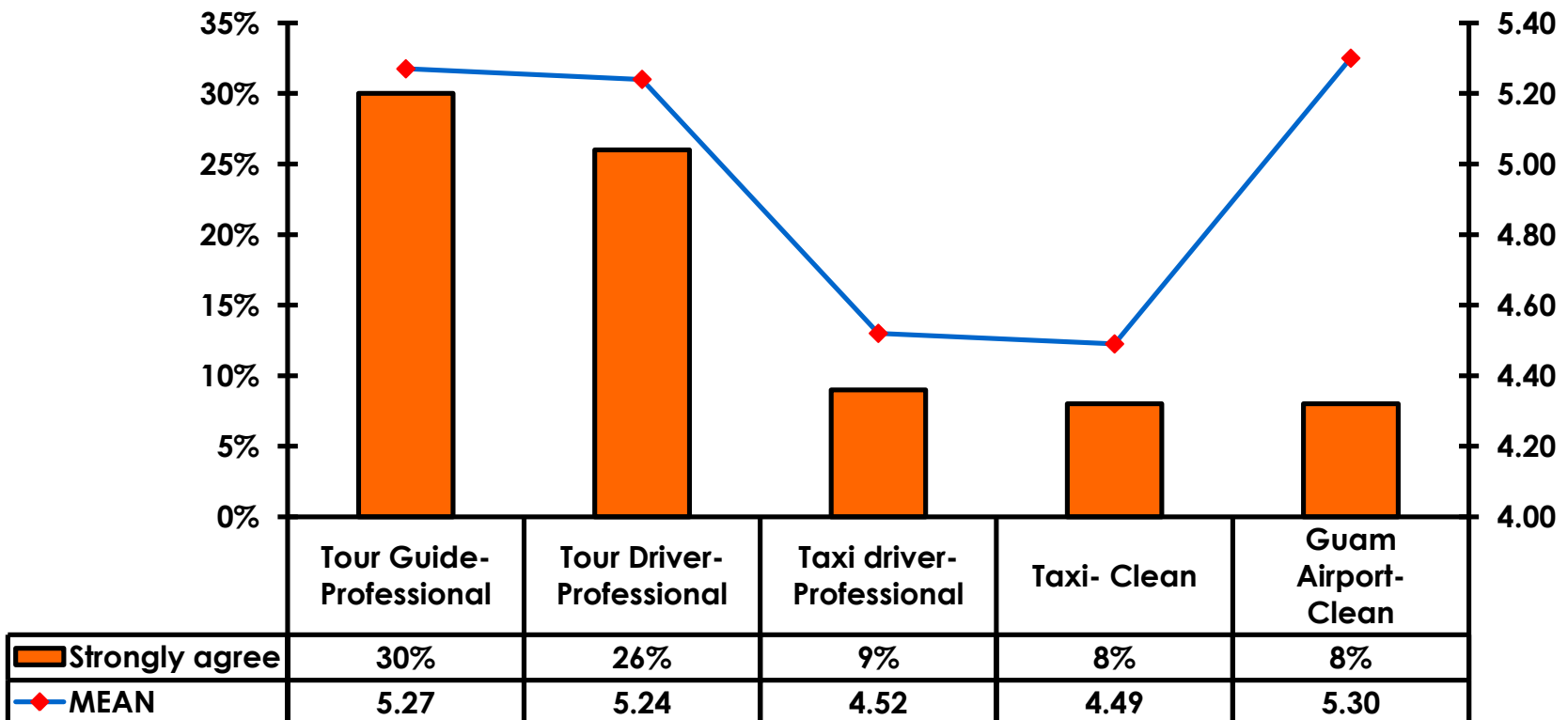


	Guam was better than expected	I had no communication problems	I will recommend Guam to friends	Sites on Guam were attractive	I plan to visit Guam again	Not enough night activities
<b>Strongly agree</b>	20%	19%	29%	17%	19%	7%
<b>MEAN</b>	5.38	5.22	5.76	4.97	5.19	4.30

# Transportation

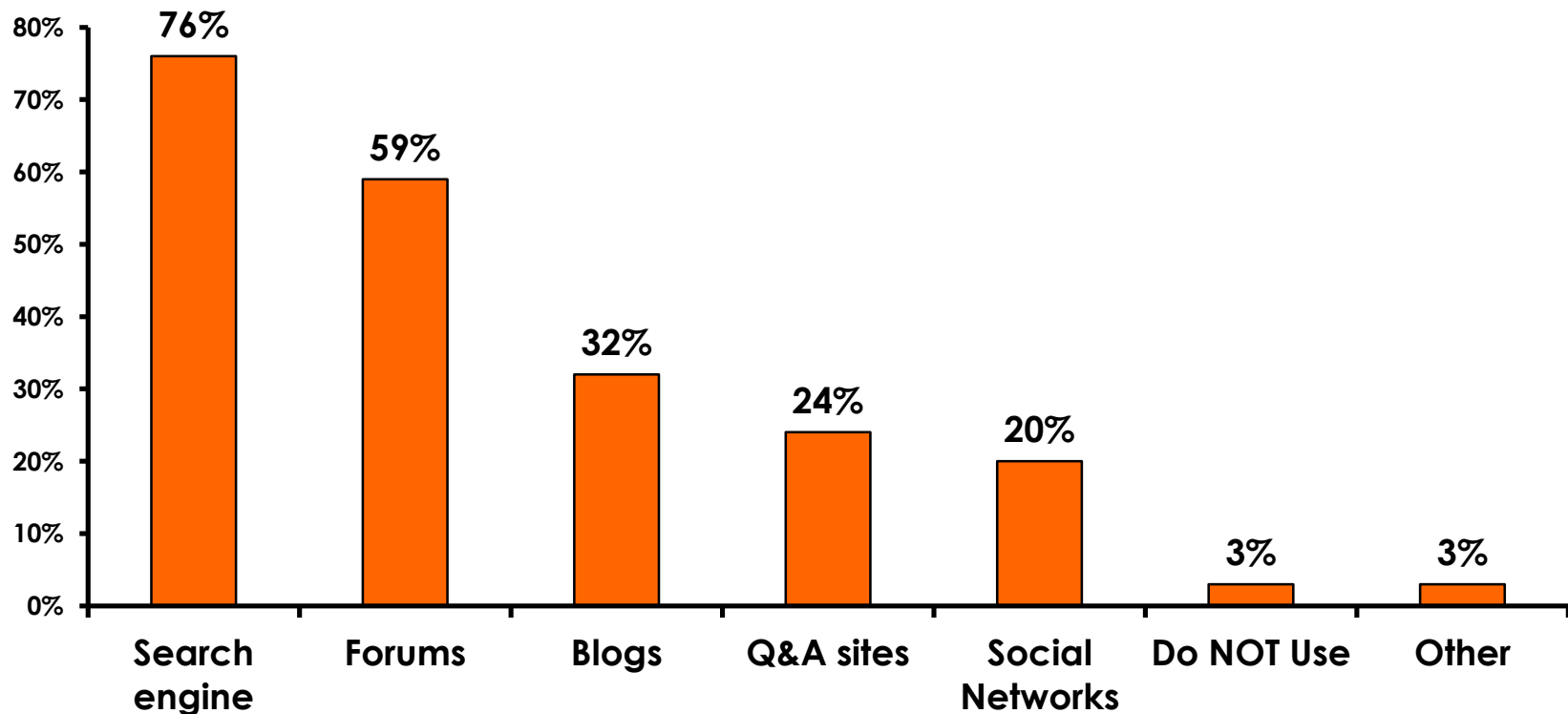
7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



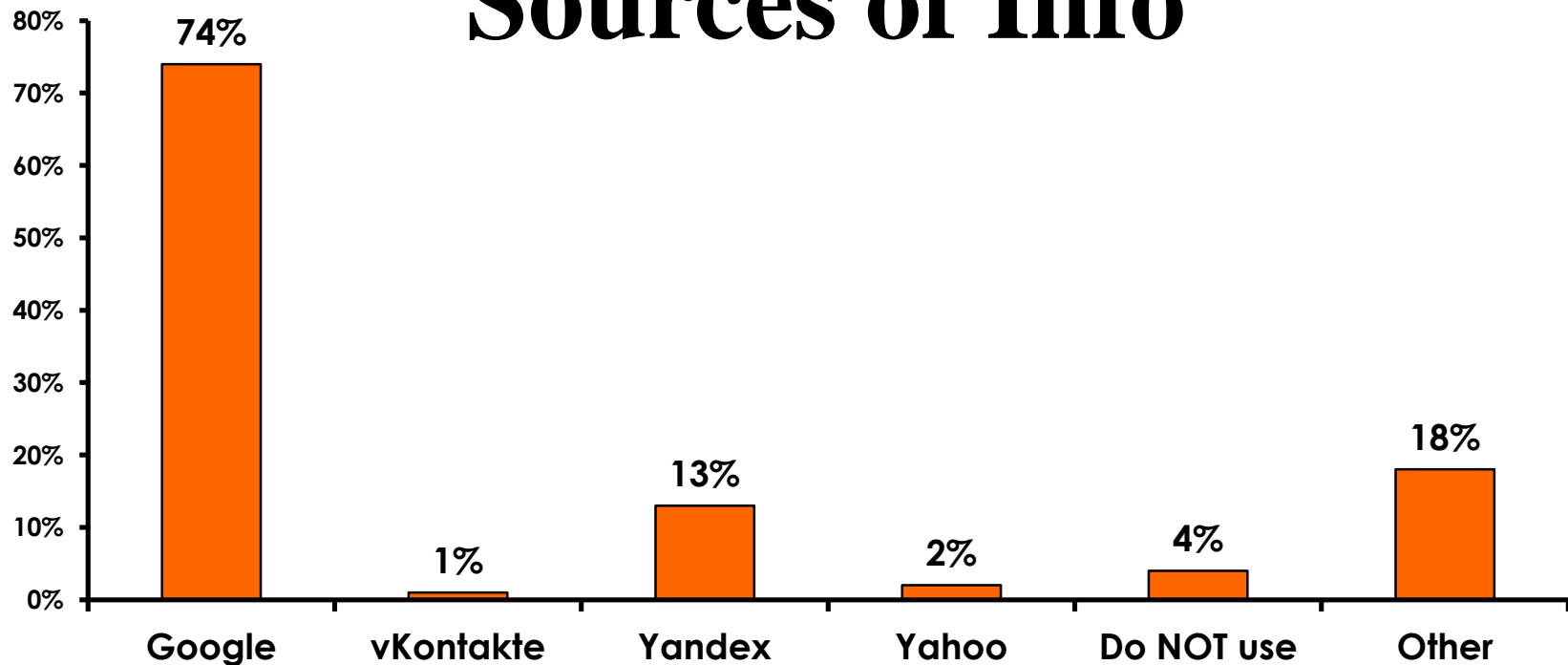
# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info



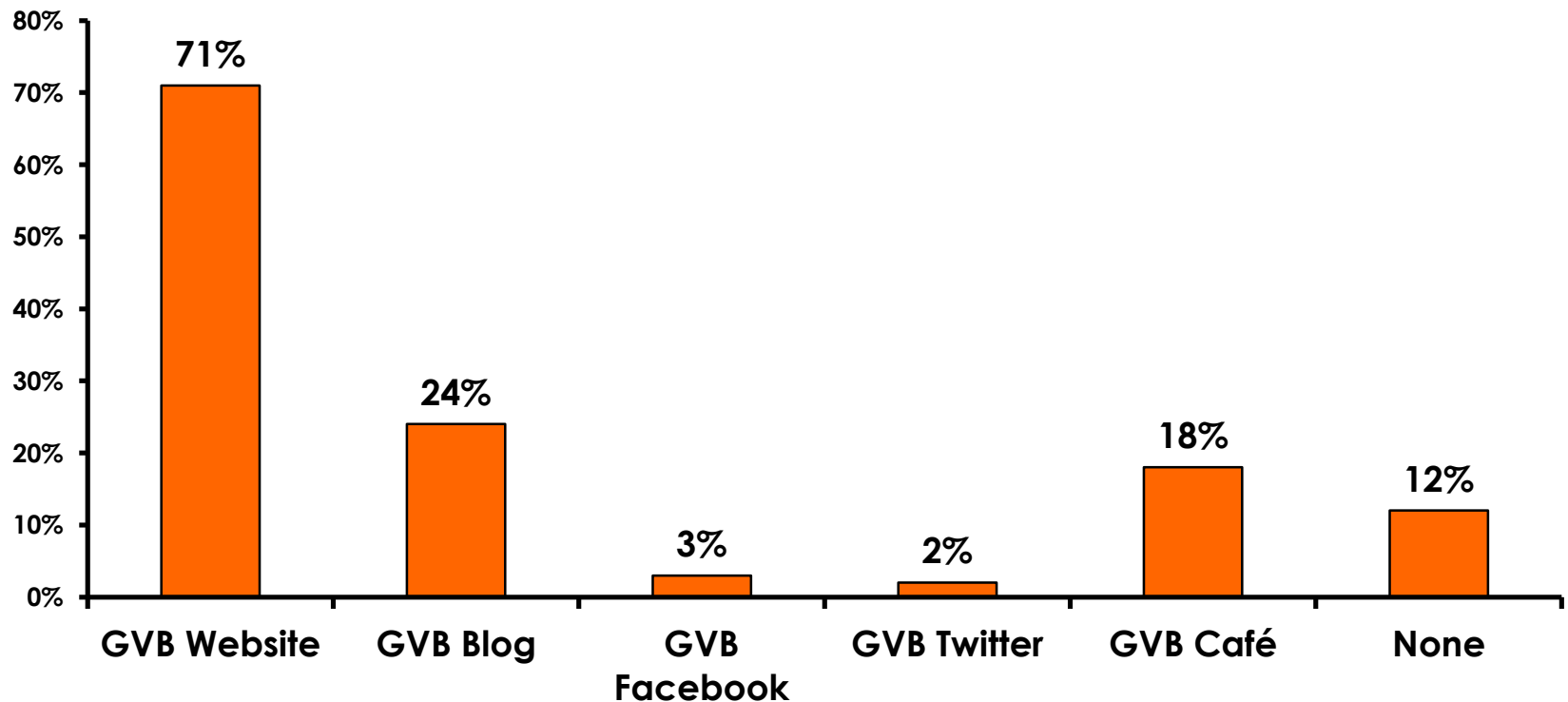
# Internet- Things To Do

## Sources of Info

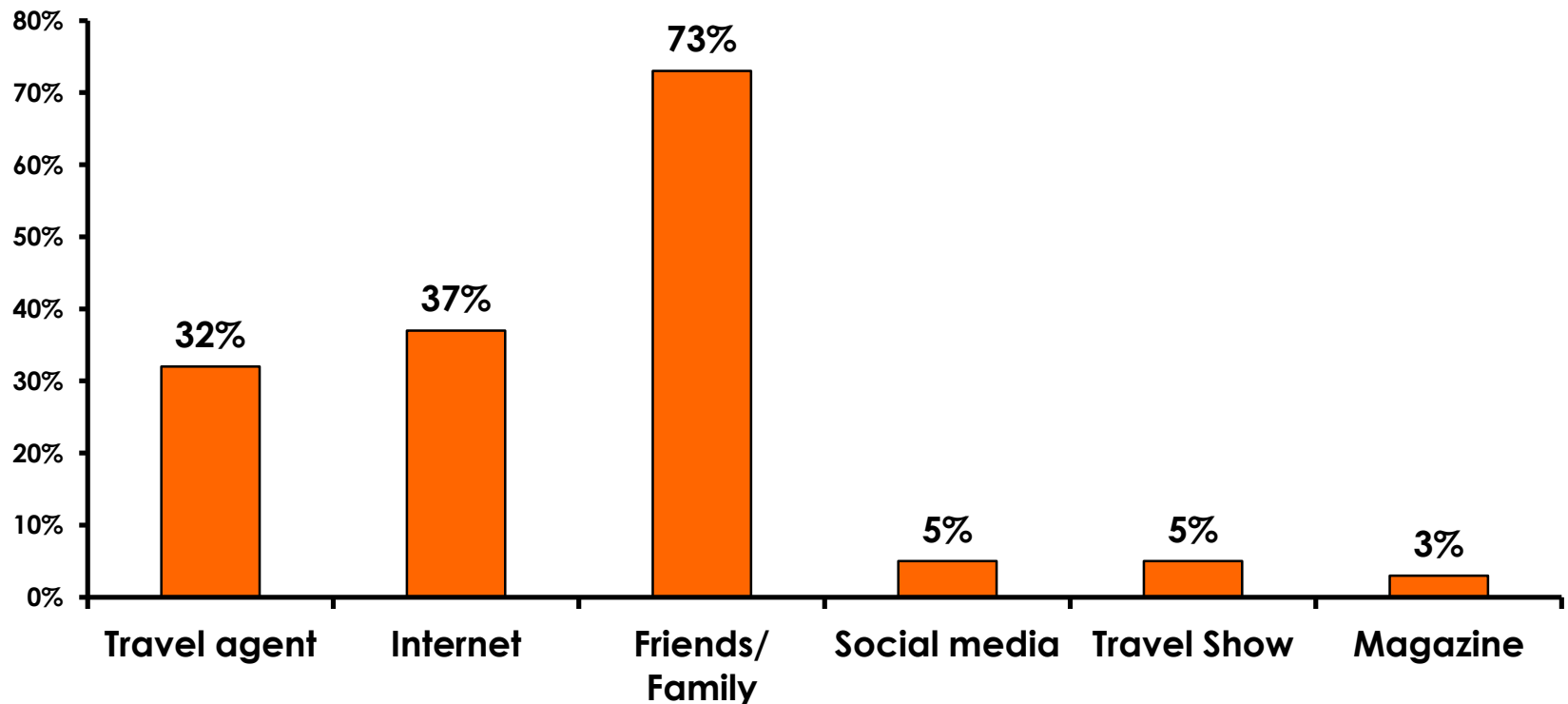




# Internet- GVB Sources

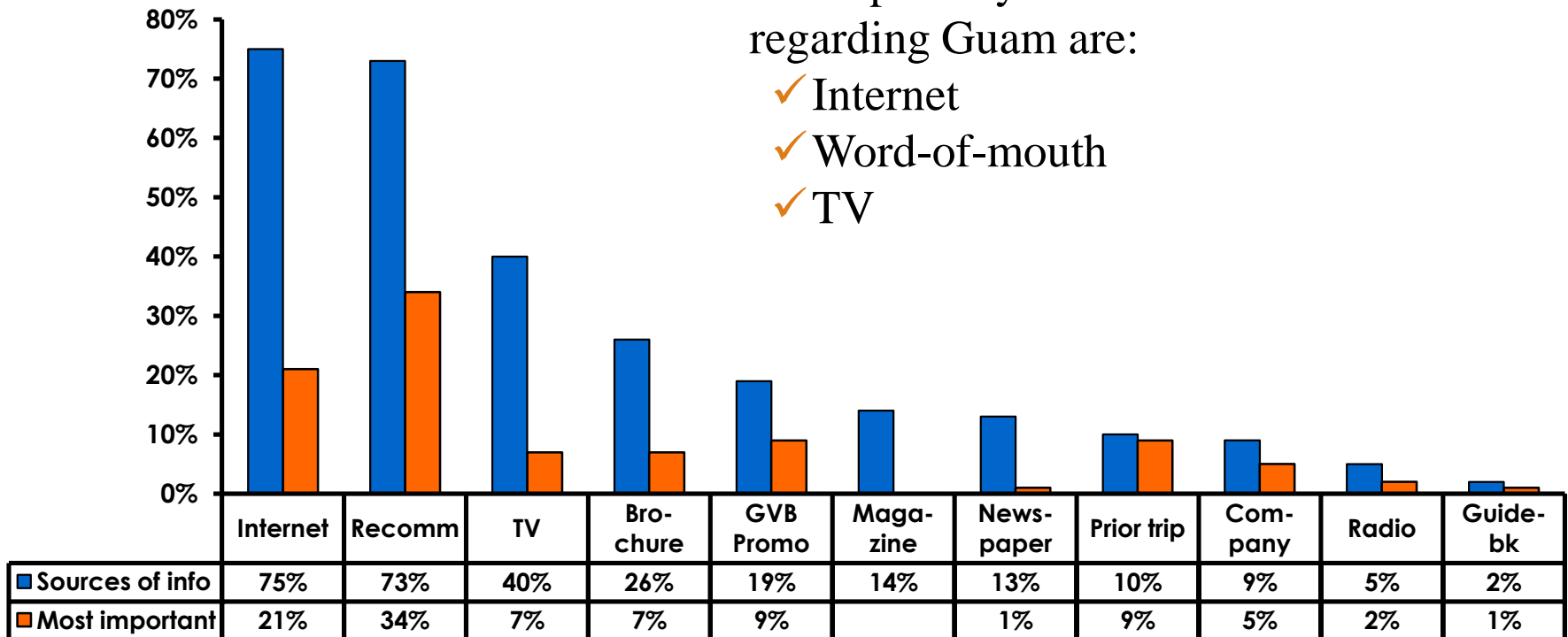


# Travel Motivation- Info Sources



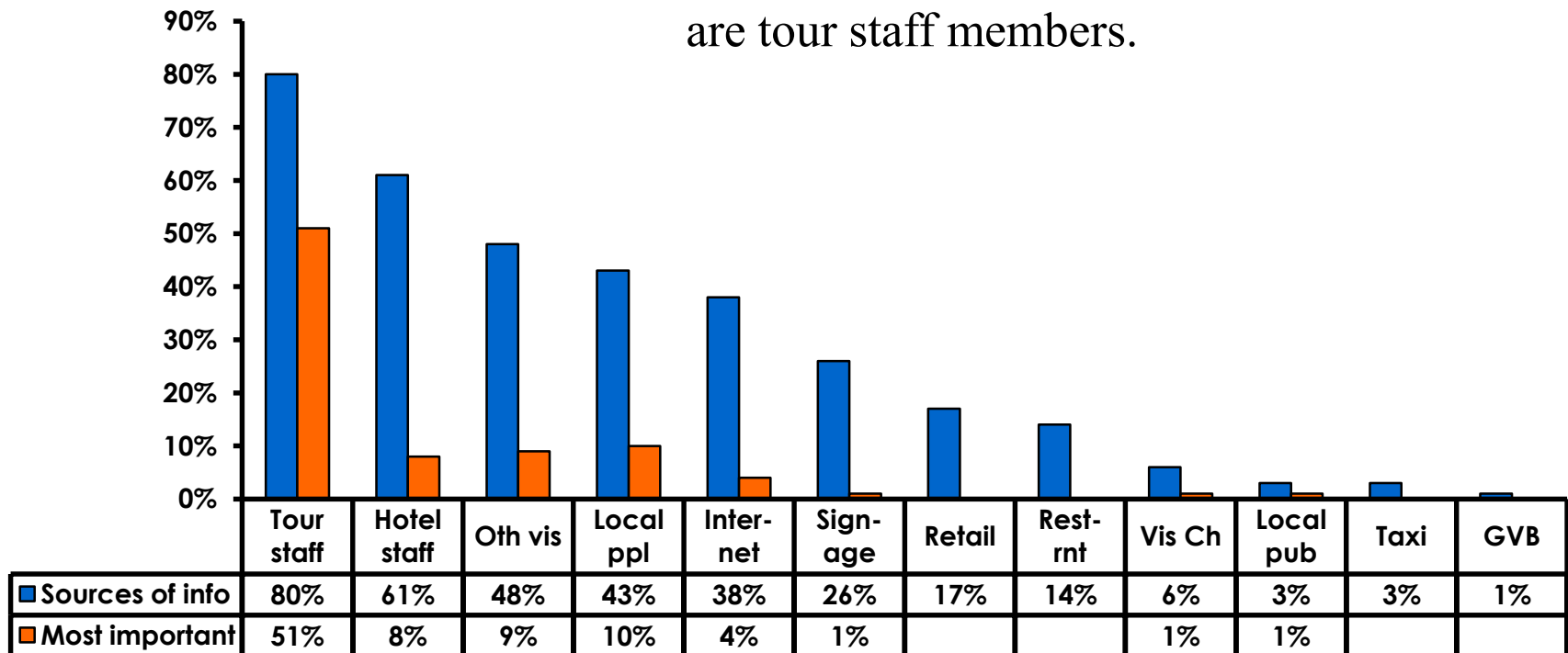
# Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
  - ✓ Internet
  - ✓ Word-of-mouth
  - ✓ TV



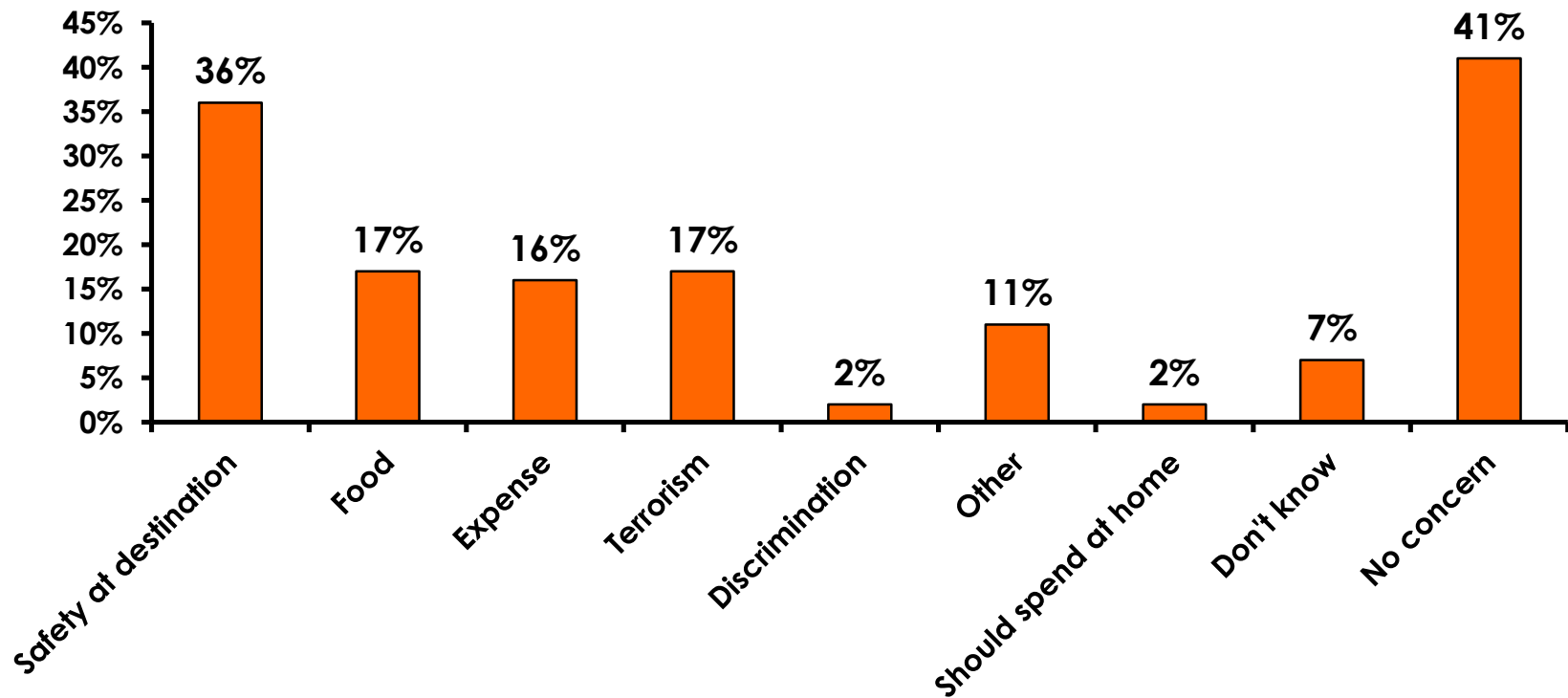
# Sources of Information Post-arrival

- The primary local source of information are tour staff members.



# SECTION 6 **OTHER ISSUES**

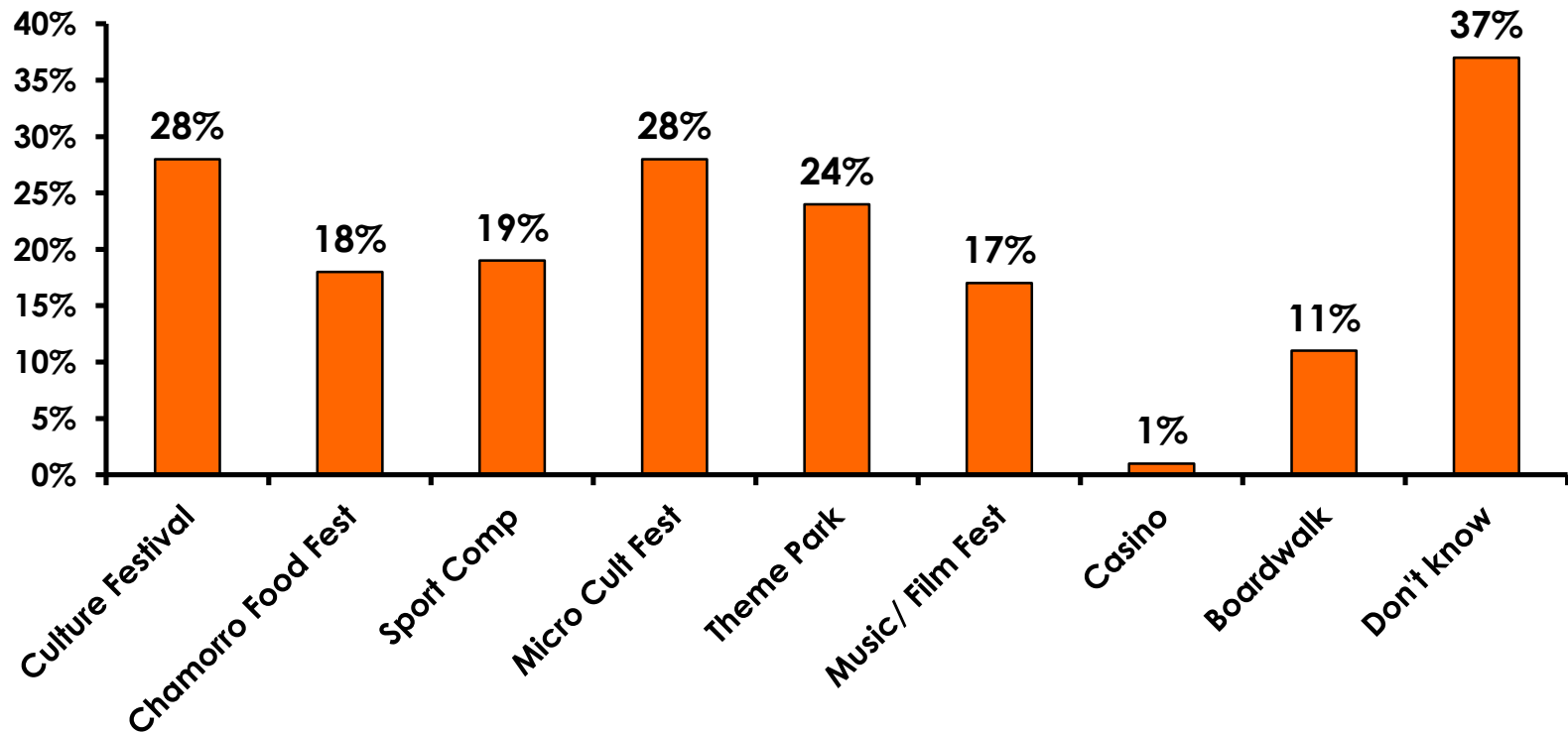
# Concerns about travel outside of Russia - Overall



# Concerns about travel outside of Russia - By Age & Income

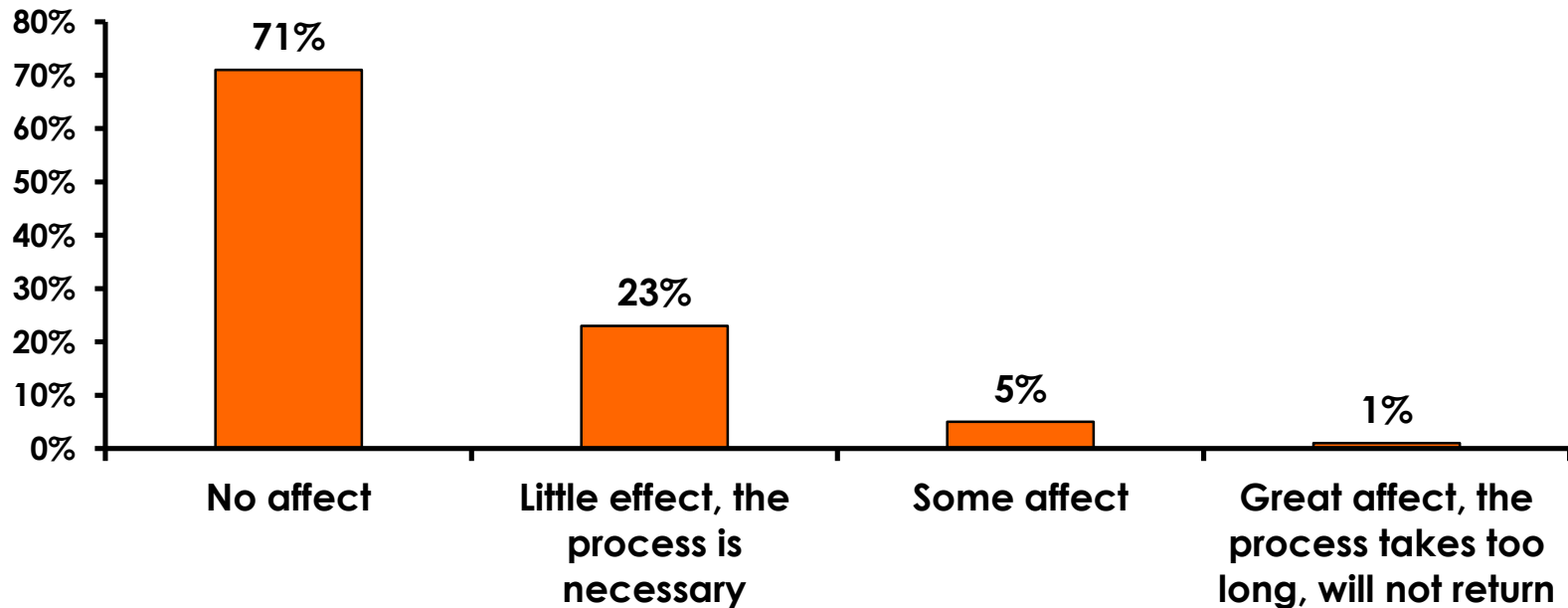
		TOTAL	AGE				Q27								
		-	18-24	25-34	35-49	50+	<732,321	732,321-1,098,481	1,098,482-1,464,642	1,464,643-1,830,803	1,830,803-2,263,124	2,263,125-3,661,606	3,661,607+	No Income	
Q21	No concerns	41%	63%	37%	34%	51%	42%	39%	24%	64%	42%	44%	67%		
	Safety	36%	25%	41%	44%	22%	42%	31%	38%	29%	33%	44%	33%	100%	
	Food	17%	13%	20%	15%	20%	26%	12%	19%	14%	17%	11%			
	Terrorism	17%	13%	17%	24%	7%	21%	14%	19%	14%	17%	11%		100%	
	Expense	16%	25%	27%	17%	2%	21%	20%	10%	14%	8%	11%			
	Other	11%		10%	12%	12%	5%	16%	5%	7%	8%	33%			
	Don't know	7%		7%	7%	10%	8%	10%	14%						
	Discrimination against Russians	2%				7%		2%	10%						
	Should spend at home	2%		2%	2%	2%		6%							
	Total	Count	150	8	41	59	41	38	49	21	14	12	9	3	1

# Activities/ Attractions- Appeal





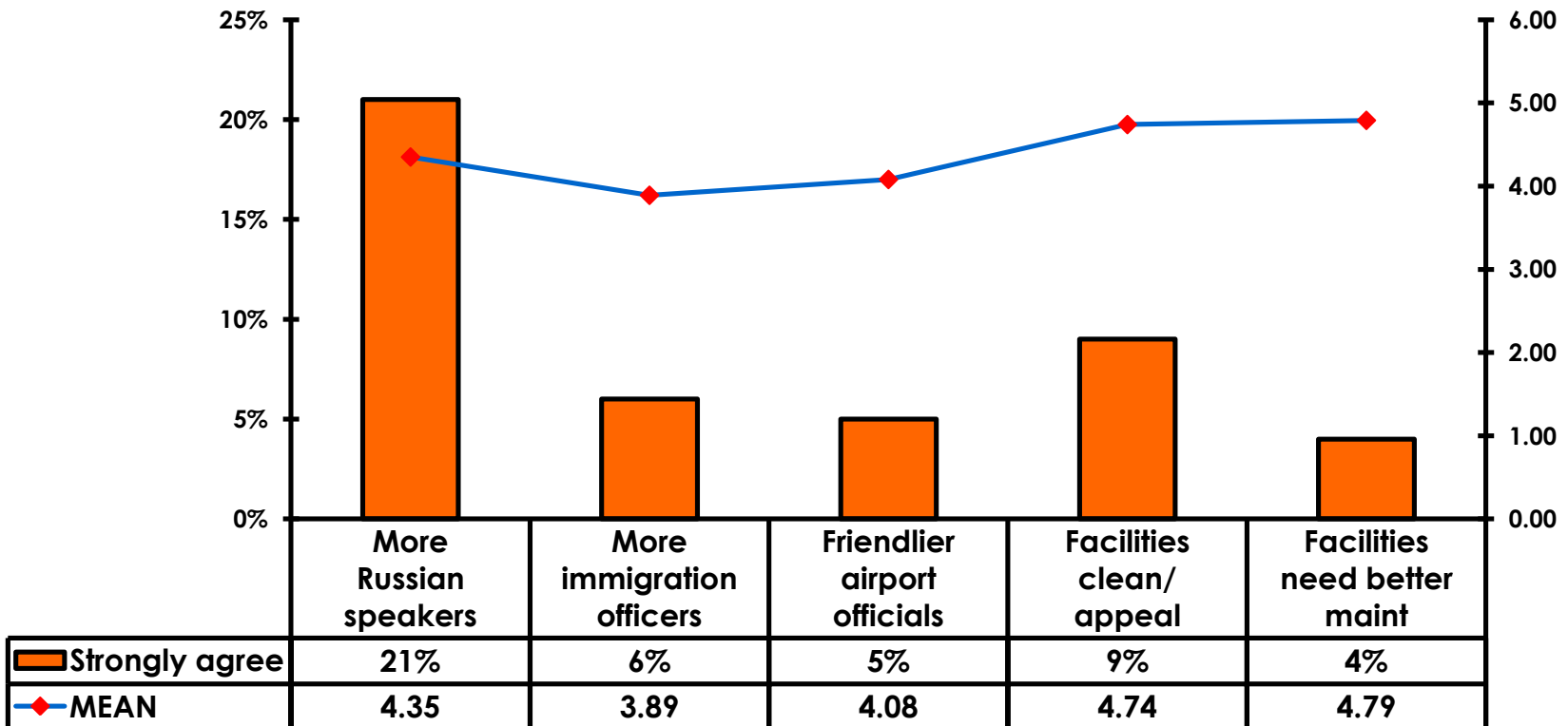
# Security Screening/ Immigration Process at Guam International Airport



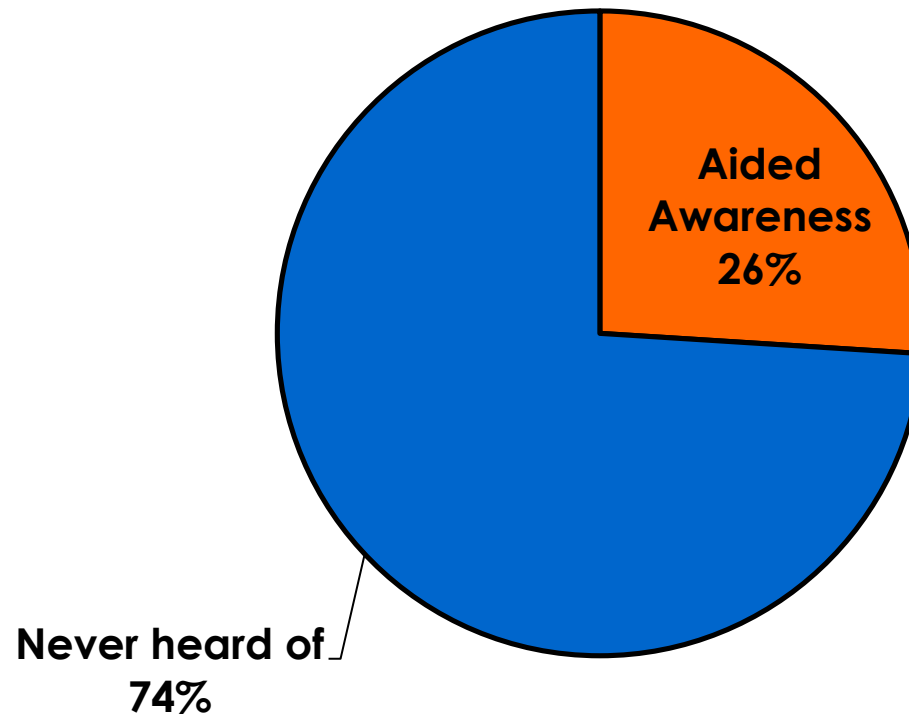
# Airport Arrival Experience

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



# Shop Guam Festival



# Shop Guam Festival - Impact

n=39

