



# **GUAM VISITORS BUREAU**

## **Russia Visitor Tracker Exit Profile**

### **FY2013**

### **1<sup>st</sup> Qtr. (OCT~DEC 2012)**



**Prepared by: QMark Research**

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# Background & Methodology

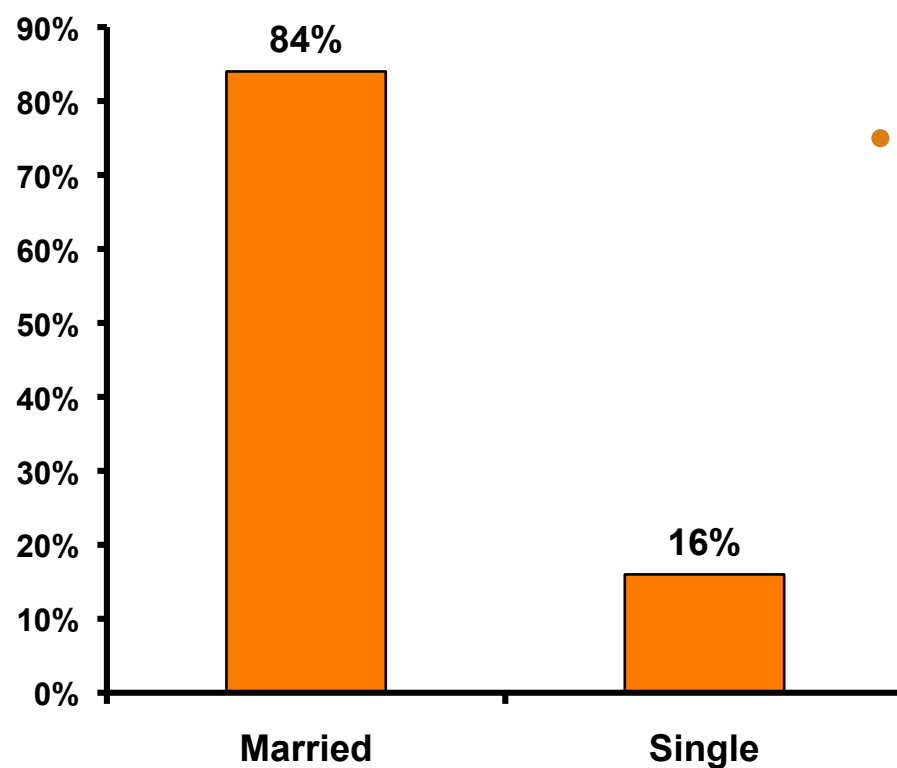
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Russian-speaking speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **150** departing 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.

# 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.

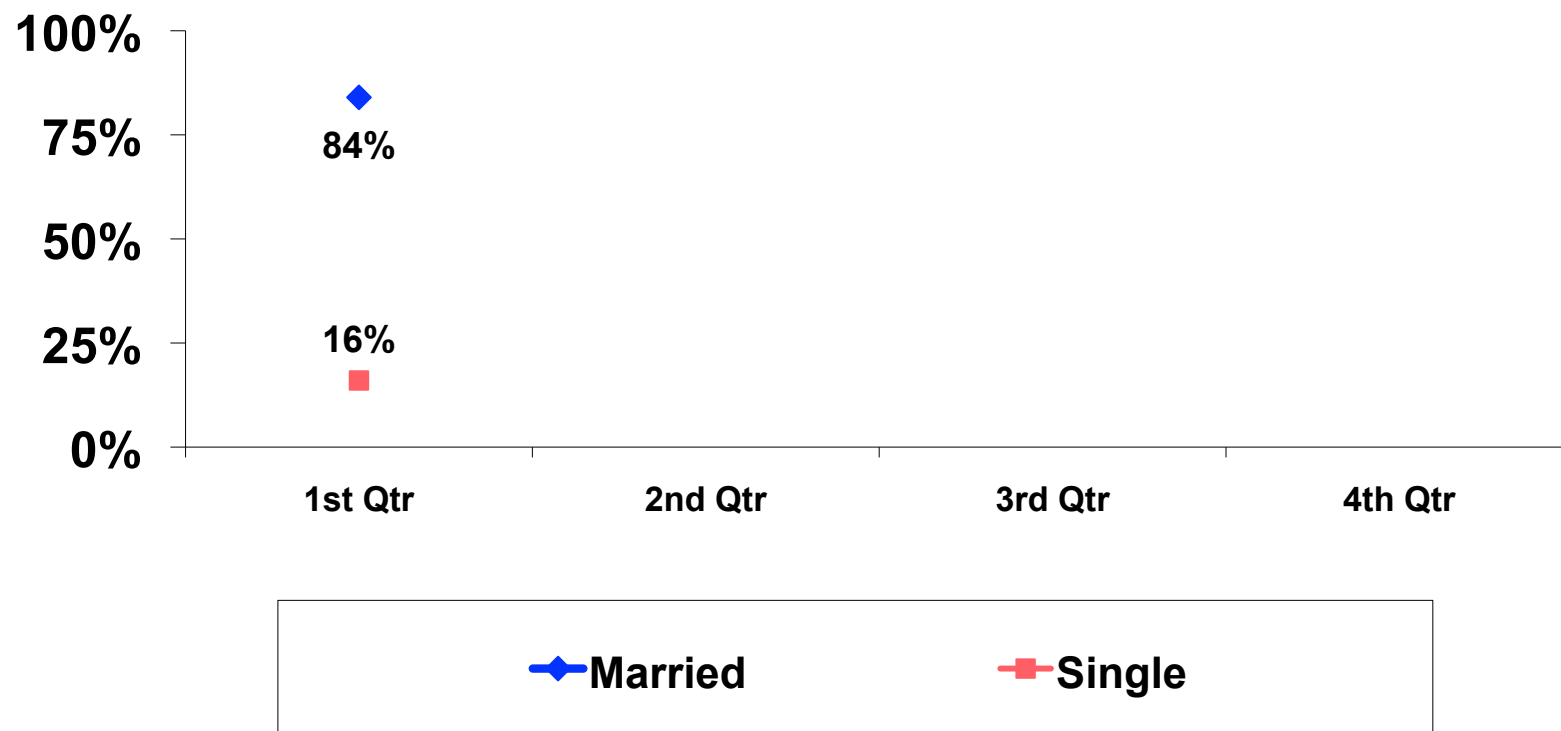
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

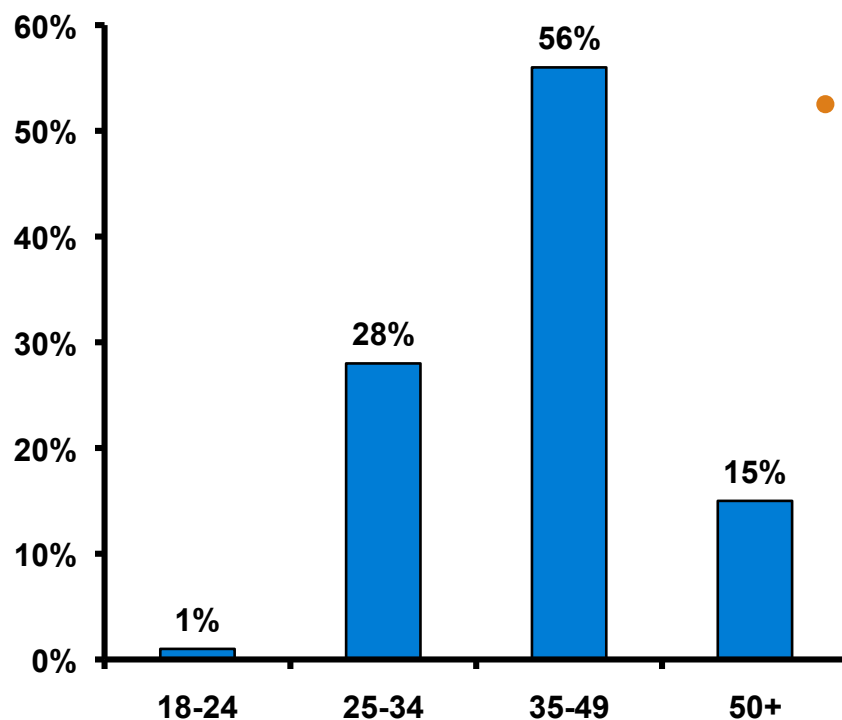


- Majority of Russian visitors are married.

# Marital Status

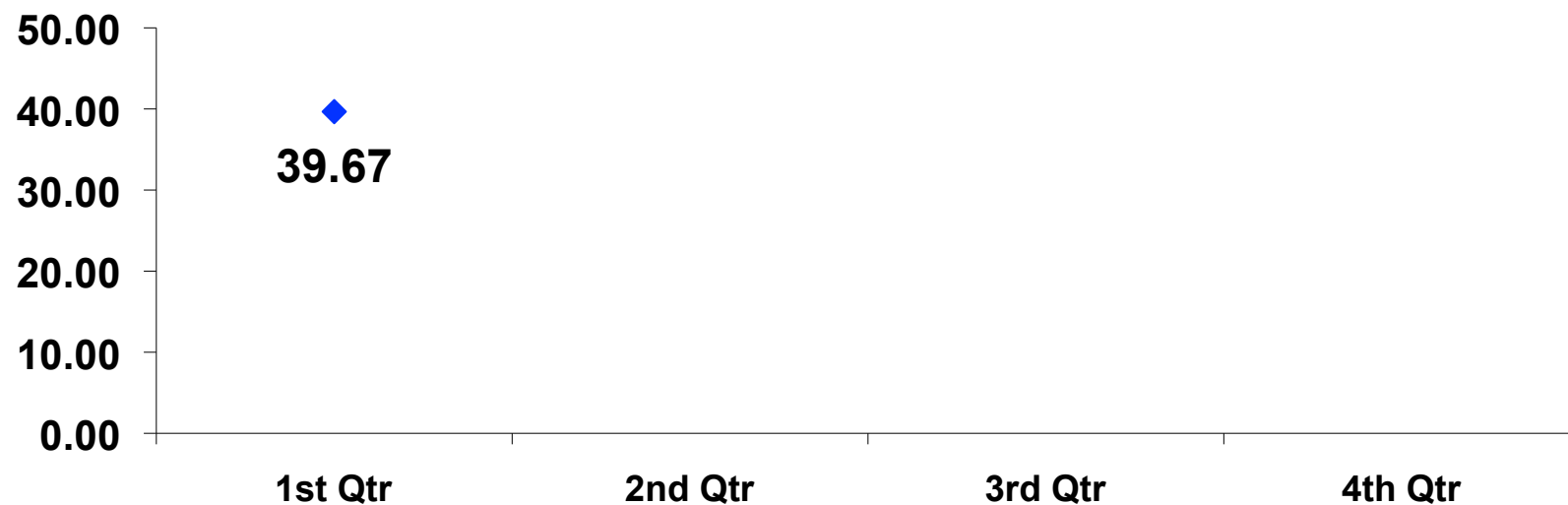


# Age - Overall



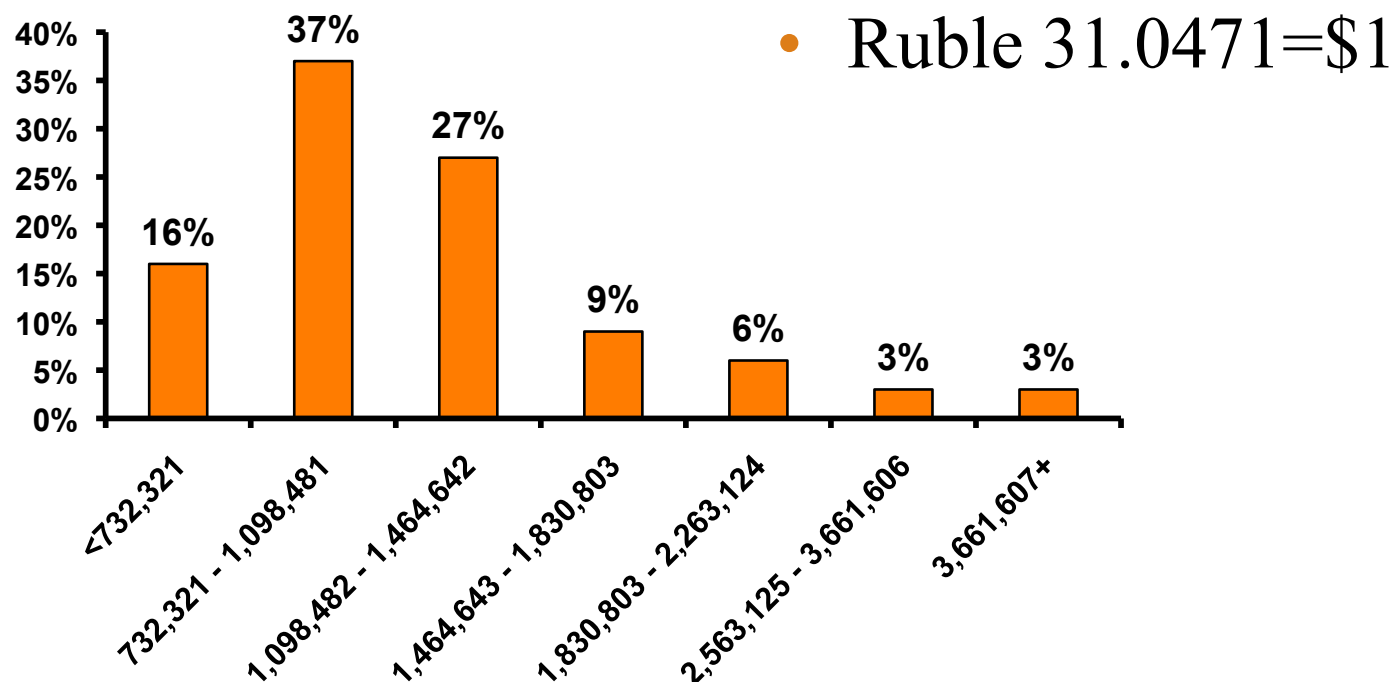
- The average age of the respondents is 39.67 years of age.

# Average Age

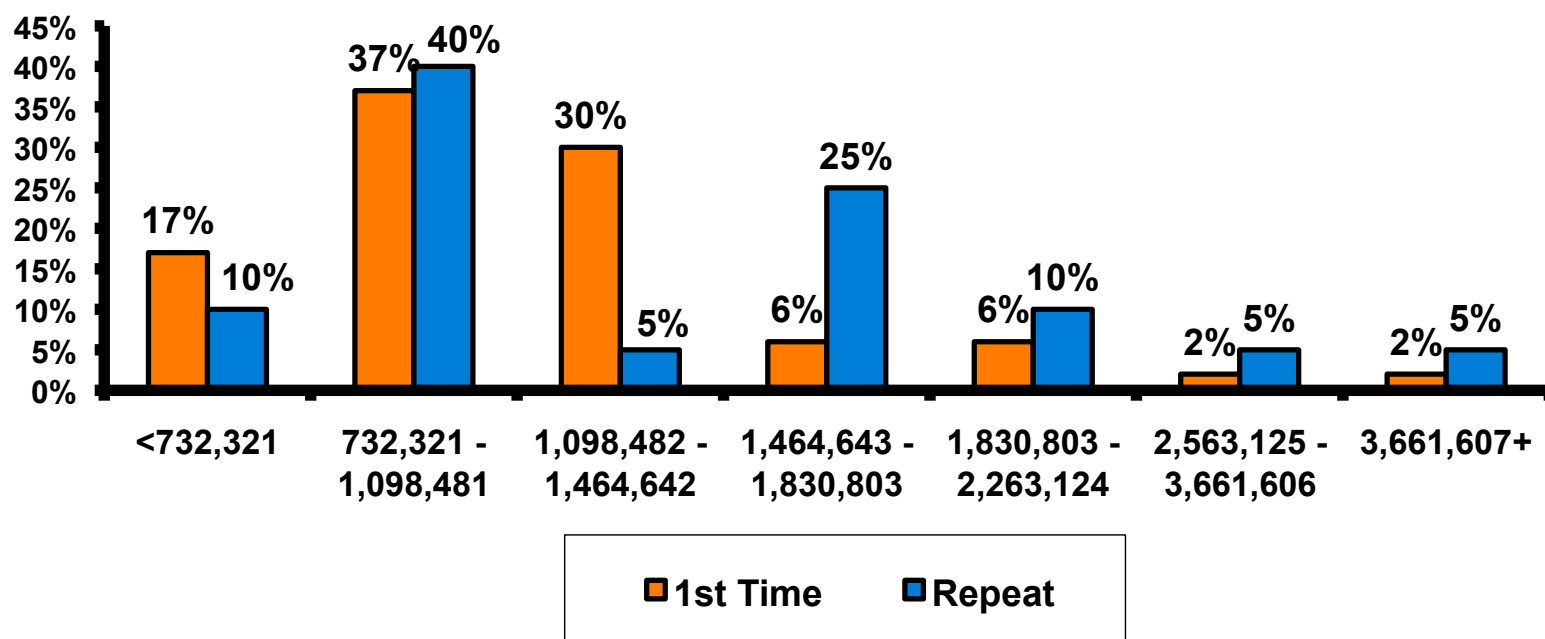




# Personal Income



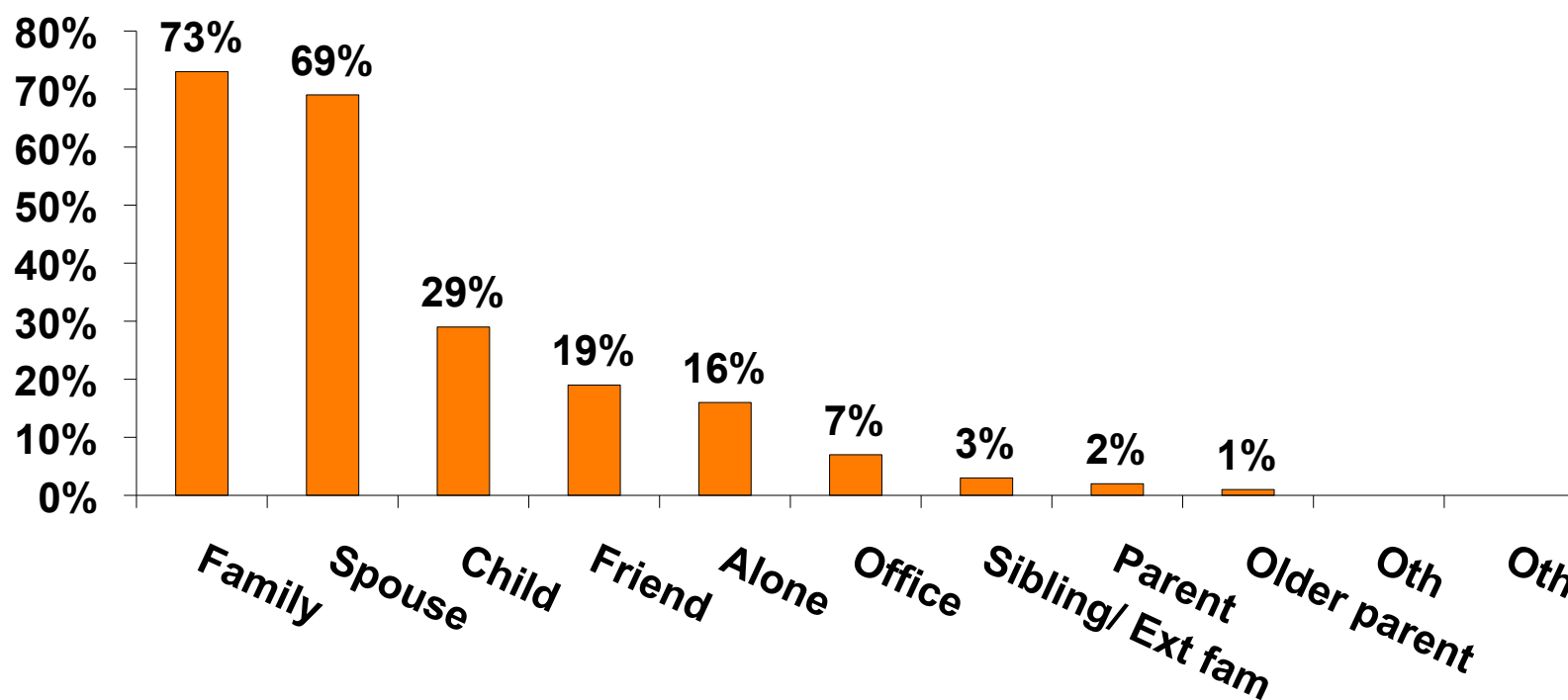
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q27	<732,321	Count	23	8	15	1	7	9	6
		Column N %	16%	11%	21%	50%	18%	11%	27%
	732,321-1,098,481	Count	55	20	35	1	16	28	8
		Column N %	37%	26%	49%	50%	40%	35%	36%
	1,098,482-1,464,642	Count	39	27	12		12	24	3
		Column N %	27%	36%	17%		30%	30%	14%
	1,464,643-1,830,803	Count	13	9	4		1	9	2
		Column N %	9%	12%	6%		3%	11%	9%
	1,830,803-2,263,124	Count	9	8	1		2	6	1
		Column N %	6%	11%	1%		5%	8%	5%
	2,563,125-3,661,606	Count	4	3	1		2	1	1
		Column N %	3%	4%	1%		5%	1%	5%
	3,661,607+	Count	4	1	3			3	1
		Column N %	3%	1%	4%			4%	5%
	No Income	Count							
		Column N %							

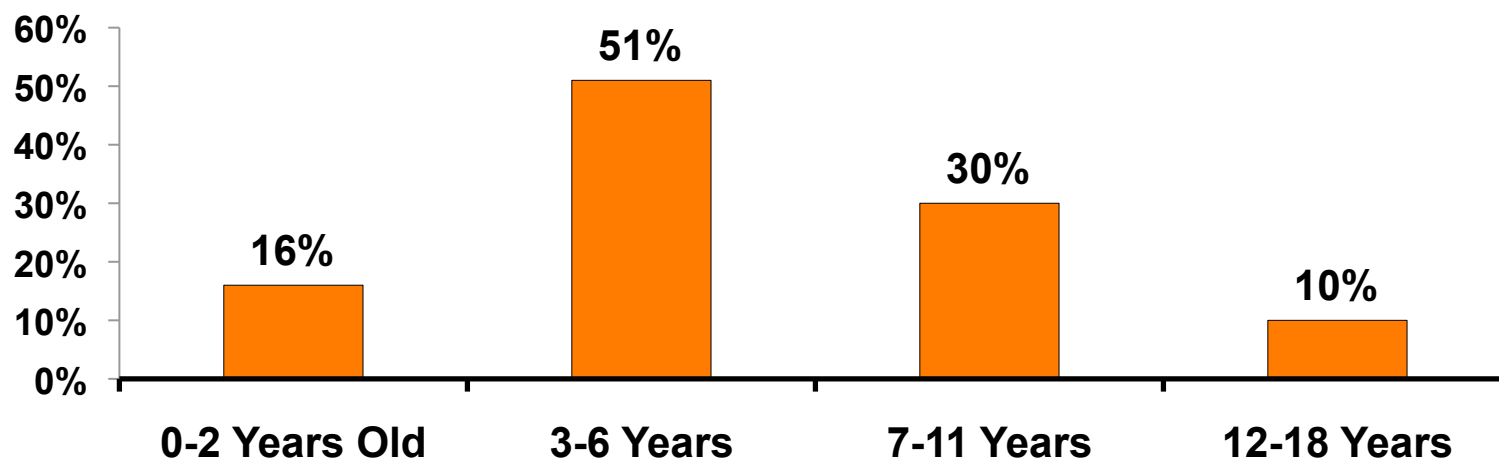
# Travel Companions



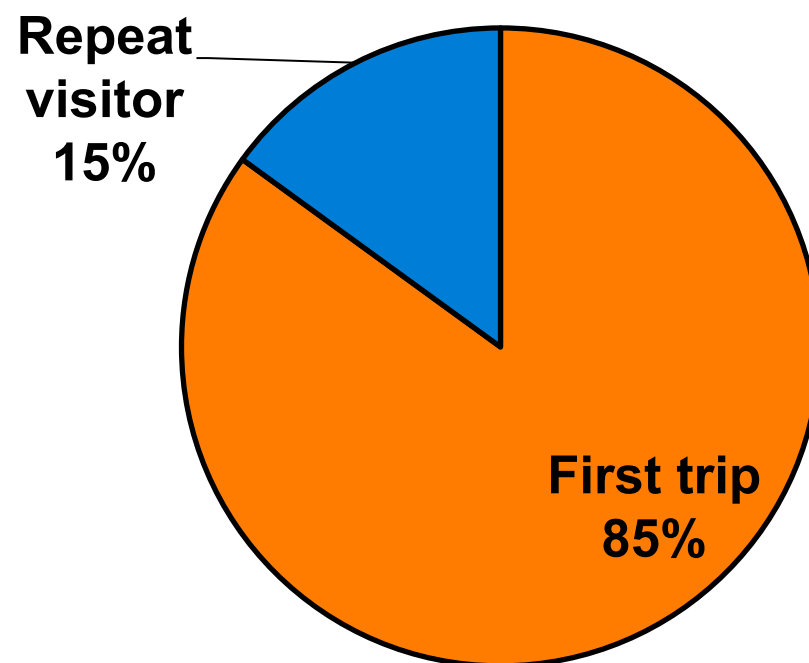
# Number of Children Travel Party

N=43 total respondents traveling with children.

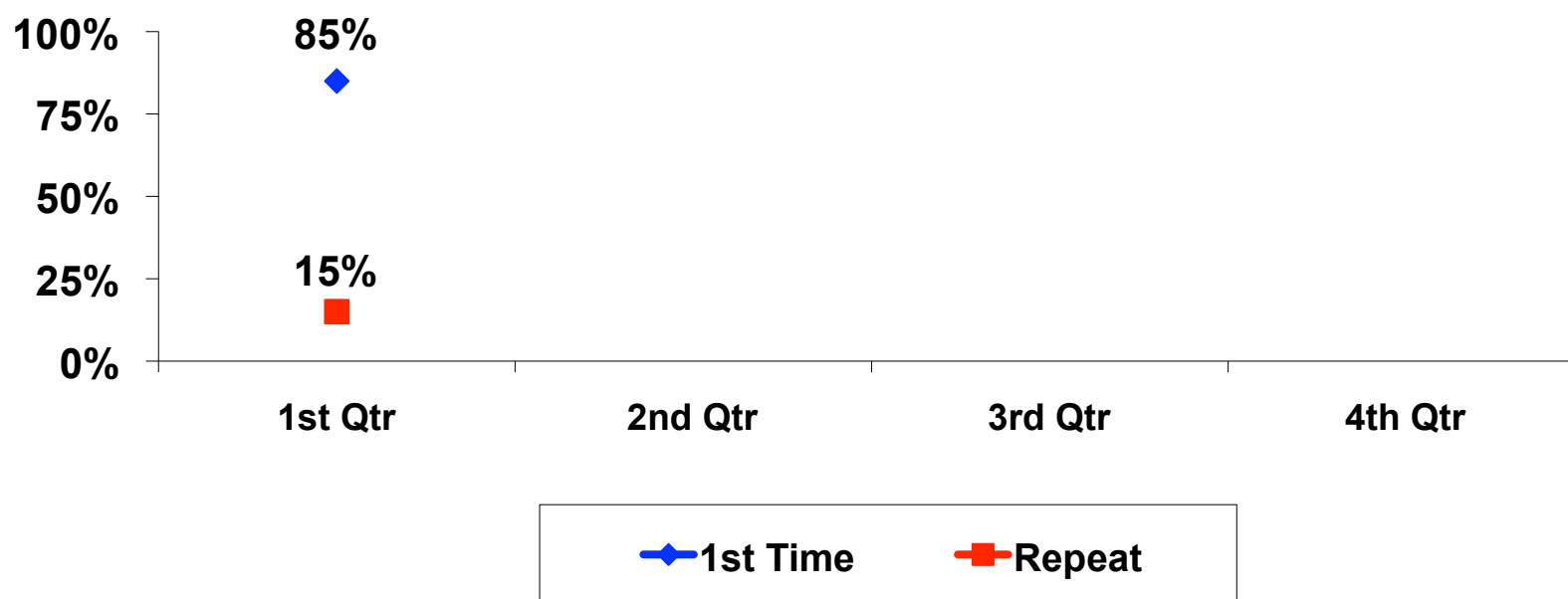
(Of those N=43 respondents, there is a total of 47 children 18 years or younger)



# Prior Trips to Guam



# Prior Trips to Guam



# Trips to Guam by Age & Gender

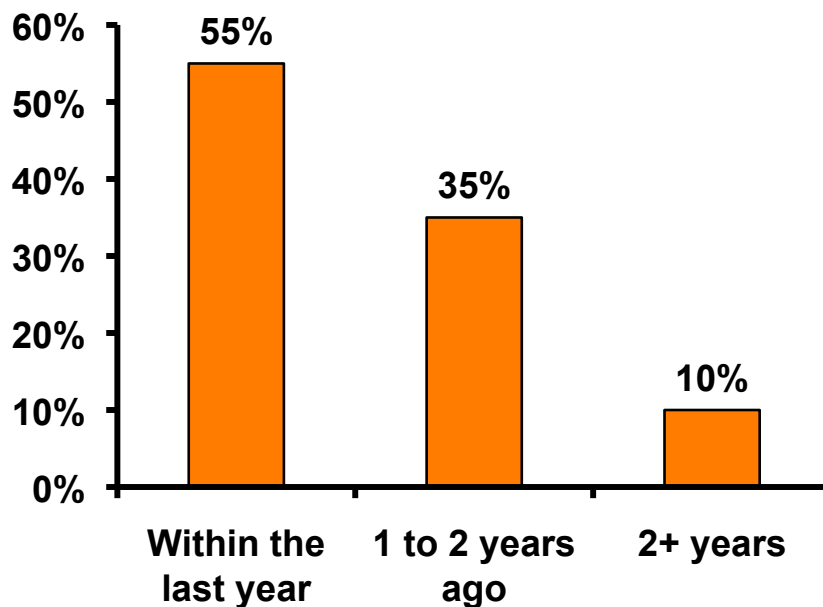
			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	77	69	8
		Column N %	51%	55%	36%
	Female	Count	73	57	14
		Column N %	49%	45%	64%
AGE	Total	Count	150	126	22
	18-24	Count	2	1	1
		Column N %	1%	1%	5%
	25-34	Count	41	35	5
		Column N %	28%	28%	25%
	35-49	Count	82	71	10
		Column N %	56%	57%	50%
	50+	Count	22	18	4
		Column N %	15%	14%	20%
	Total	Count	147	125	20

- First-time visitors tend to be younger than repeat visitors to Guam.



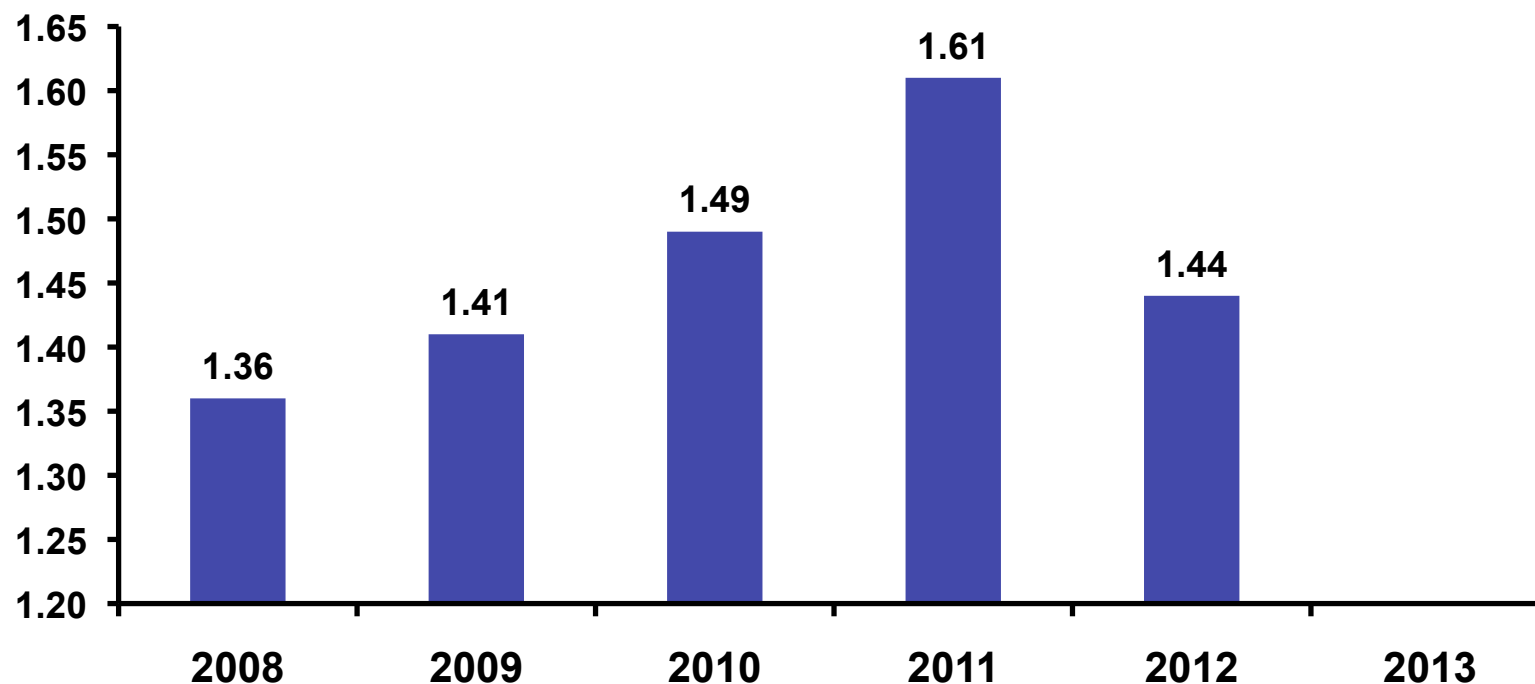
# Repeat Visitors Last Trip

n = 20

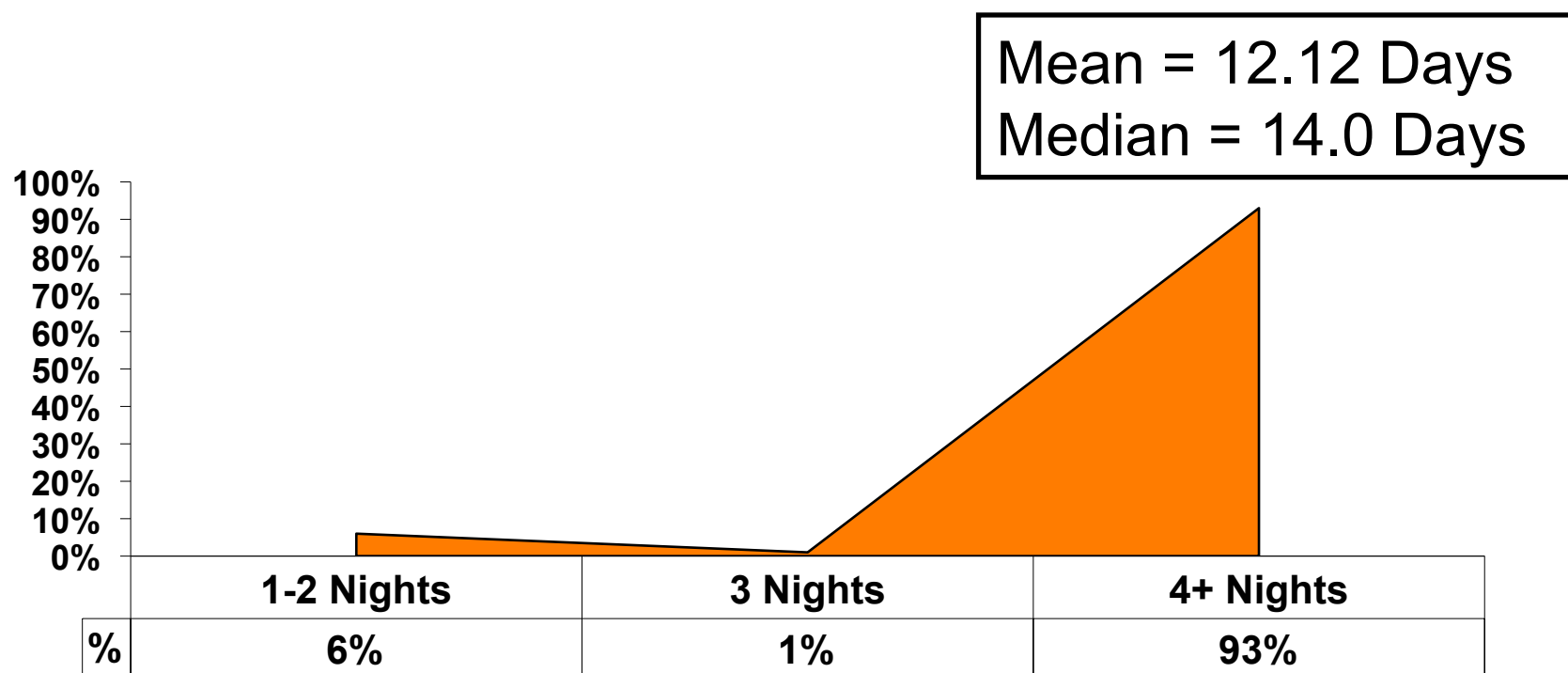


- The average repeat visitor has been to Guam 1.75 times.
- A majority of the repeat visitors have been to Guam within the last 2 years.

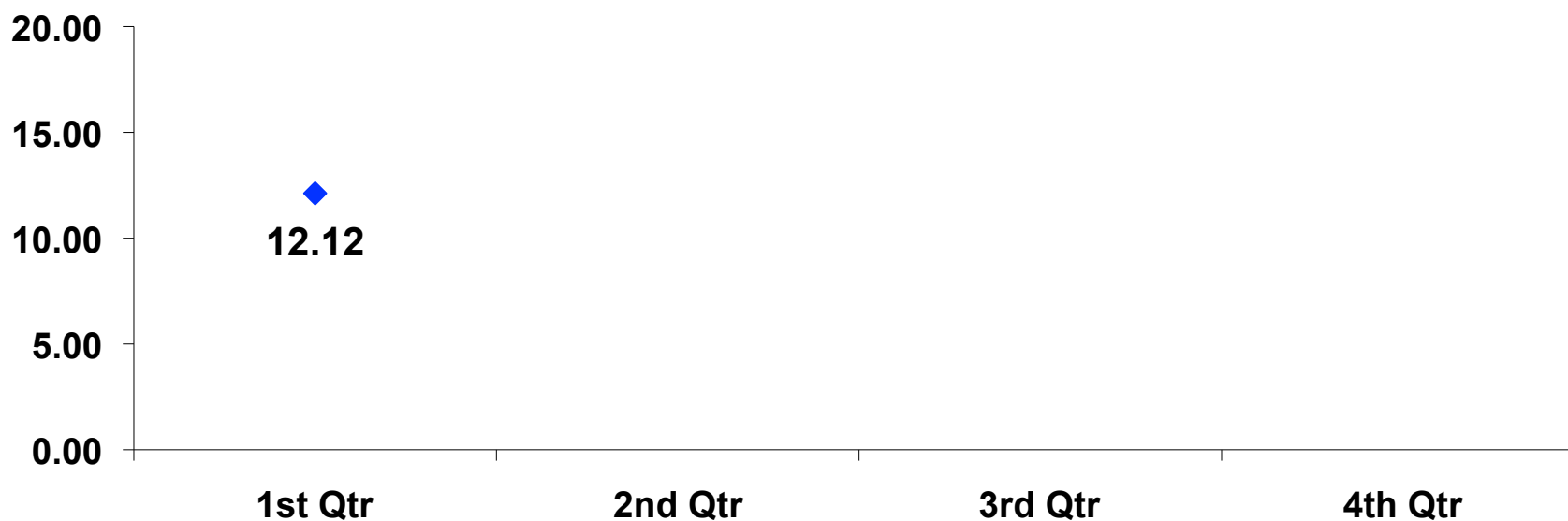
# Average Number Overnight Trips (2008-2013) (2 nights or more)



# Length of Stay



# Average Length of Stay

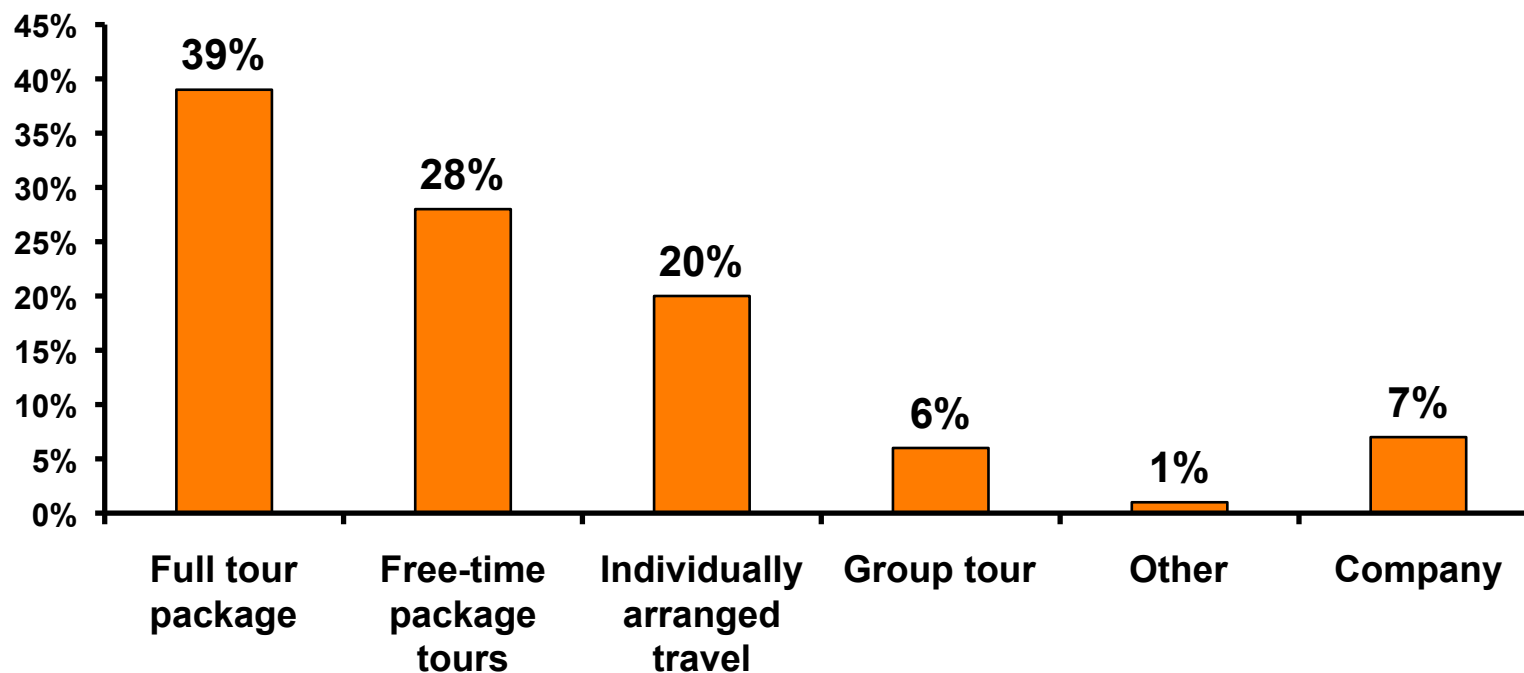


# Occupation by Income

		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	23%	4%	7%	16%	69%	89%	100%	50%
	Professional/ Specialist	20%	13%	28%	26%				
	Company: Manager	18%	13%	15%	37%				25%
	Company: Office/ Non-Mgr	14%	17%	24%	3%	15%			
	Homemaker	6%	4%	9%	5%	8%			
	Company: Exec	5%		2%	11%	8%			25%
	Company: Engineer	3%	4%	6%			11%		
	Skilled worker	3%	9%	4%					
	Retired	2%	13%						
	Teacher	1%	4%	2%					
	Govt: Office/ Non-Mgr	1%	4%		3%				
	Company: Salesperson	1%	4%	2%					
	Other	1%	4%						
	Govt: Executive	1%		2%					
	Govt: Manager	1%	4%						
	Total Count	147	23	54	38	13	9	4	4

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



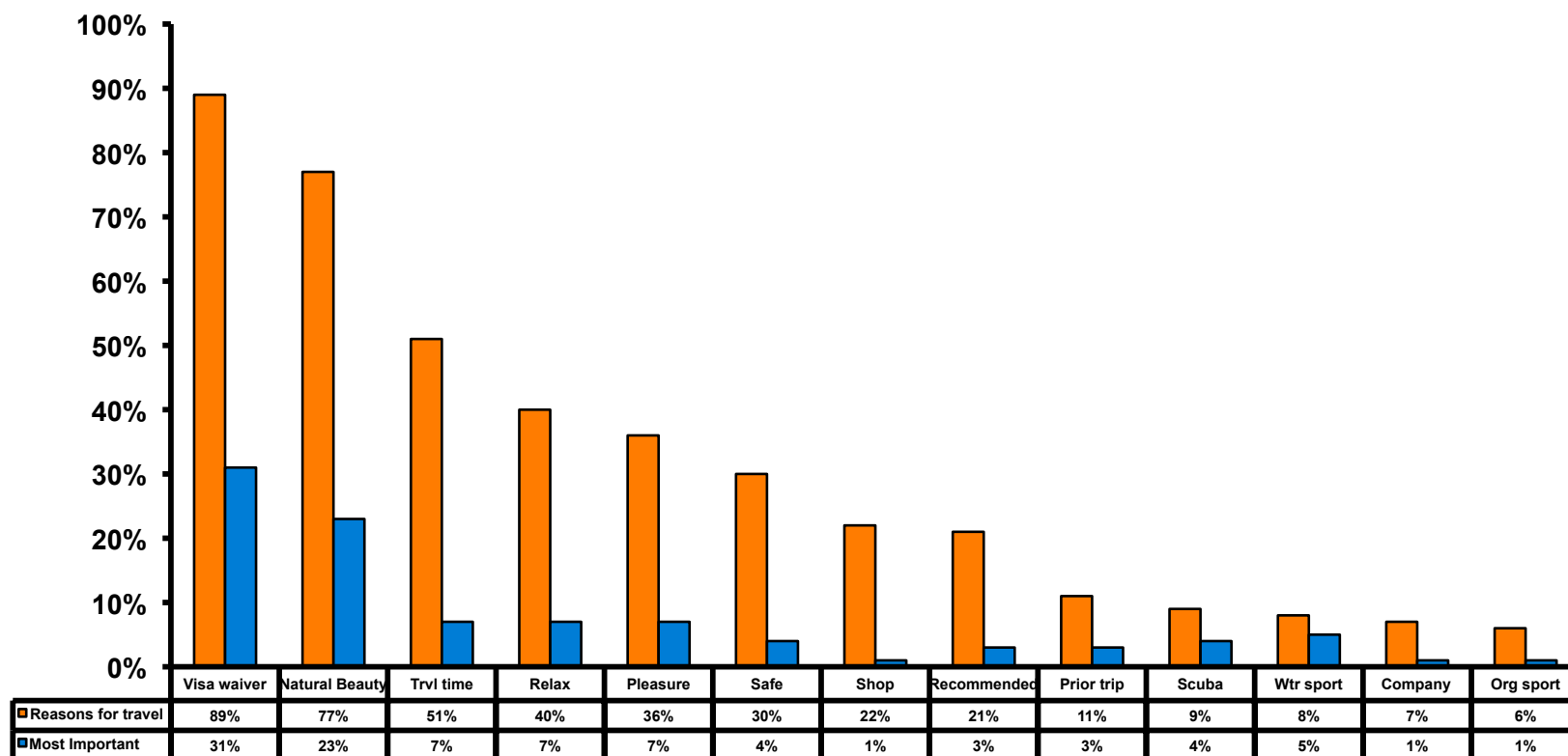
# Accommodation by Income

Average length of stay: 12.12 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+
Q9	PIC Club	28%	35%	31%	13%	31%	22%	50%	50%
	Hilton Guam Resort	20%		15%	33%	31%	44%	25%	
	Fiesta Resort Guam	16%	26%	18%	15%		11%		25%
	Hyatt Regency Guam	15%	4%	7%	23%	38%	22%	25%	25%
	Holiday Resort Guam	4%	9%	4%	5%				
	Outrigger Guam Resort	3%		9%					
	Onward Beach Resort	3%		5%					
	Guam Aurora Resort	3%	9%	2%	3%				
	Sheraton Laguna Guam	2%	9%		3%				
	Westin Resort Guam	1%		4%					
	Guam Marriott Resort	1%	4%		3%				
	Other	1%		2%					
	Hotel Santa Fe	1%		2%					
	Royal Orchid Guam	1%			3%				
	Oceanview Hotel	1%	4%						
	Bayview Hotel	1%		2%					
	Total	Count	149	23	55	39	13	9	4
									4



# Travel Motivation - Top Responses



# **Most Important Reason for Choosing Guam**

- Visa waiver
- Guam's natural beauty/ beaches
- Pleasure

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	No Visa required	89%	100%	80%	96%	77%	91%	86%
	Natural beauty	77%	50%	75%	74%	91%	70%	85%
	Short travel time	51%		50%	59%	27%	49%	53%
	Relax	40%		38%	38%	59%	39%	42%
	Pleasure	36%	50%	38%	38%	27%	36%	36%
	Safe	30%	50%	25%	30%	32%	30%	29%
	Shopping	22%	50%	25%	21%	14%	16%	29%
	Recomm- friend/family/trvl agnt	21%	100%	13%	26%	18%	21%	22%
	Previous trip	11%	50%	10%	10%	14%	8%	15%
	Scuba	9%	50%	18%	7%		13%	6%
	Water sports	8%		8%	11%		10%	6%
	Company Sponsored	7%		13%	6%		9%	4%
	Organized sports	6%		13%	5%		9%	3%
	Visit friends/ Relatives	4%		3%	5%	5%	4%	4%
	Price	4%			6%	5%	4%	4%
	Company/ Business Trip	3%		8%	2%		1%	6%
	Other	1%				5%	1%	
	Total Count	149	2	40	82	22	77	72

# 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	No Visa required	89%	91%	93%	85%	85%	89%	100%	50%
	Natural beauty	77%	91%	84%	74%	77%	33%	50%	50%
	Short travel time	51%	43%	58%	51%	62%	22%	50%	25%
	Relax	40%	26%	33%	51%	46%	22%	75%	75%
	Pleasure	36%	17%	31%	44%	69%	33%	50%	25%
	Safe	30%	17%	22%	31%	77%	11%	50%	50%
	Shopping	22%	22%	27%	13%	31%	22%	25%	25%
	Recomm- friend/family/trvl agnt	21%	26%	22%	21%	23%	33%		
	Previous trip	11%	9%	11%	3%	31%	11%	25%	25%
	Scuba	9%	13%	2%	13%	8%	22%	50%	
	Water sports	8%		2%	13%	8%	33%	25%	25%
	Company Sponsored	7%	4%	11%	5%	8%			
	Organized sports	6%		2%	13%	15%	11%		
	Visit friends/ Relatives	4%	13%	2%	5%				
	Price	4%	9%	4%	3%	8%			
	Company/ Business Trip	3%	4%	7%					
	Other	1%	4%						
	Total Count	149	23	55	39	13	9	4	4

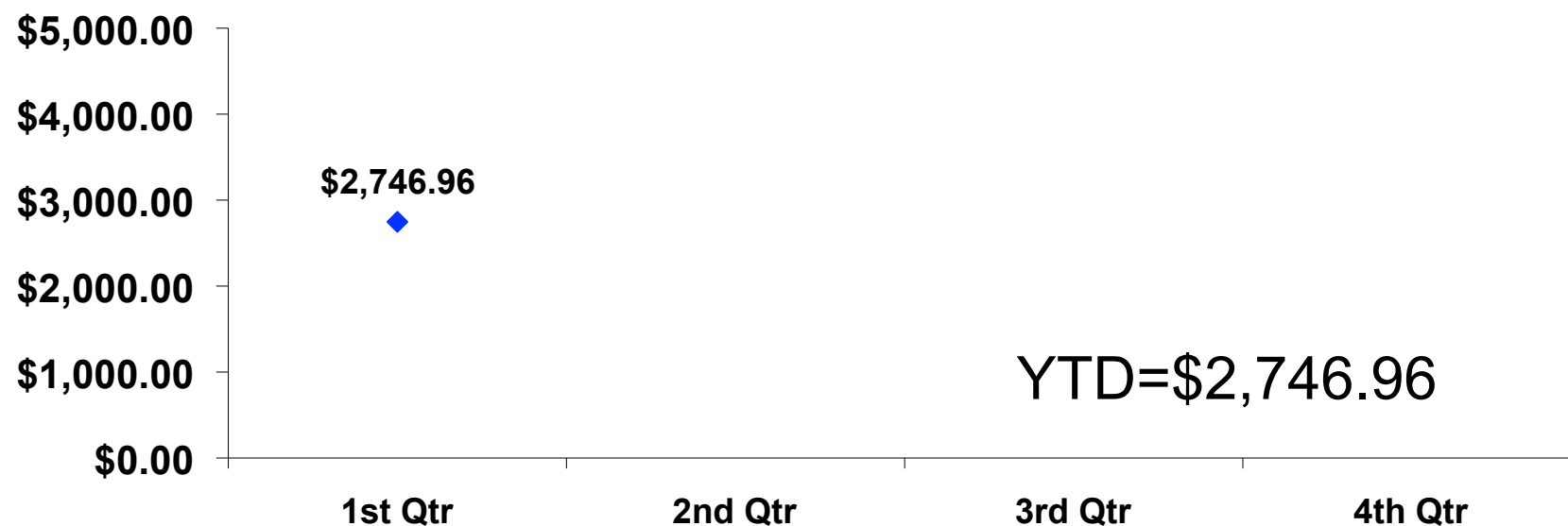
# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures

Ruble 31.0471/US\$1

- \$5,516.10 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$14,816 = maximum (highest amount recorded for the entire sample)
- \$2,746.96 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person



# Breakdown of Prepaid Expenditures

Rub 31.0471=\$1

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

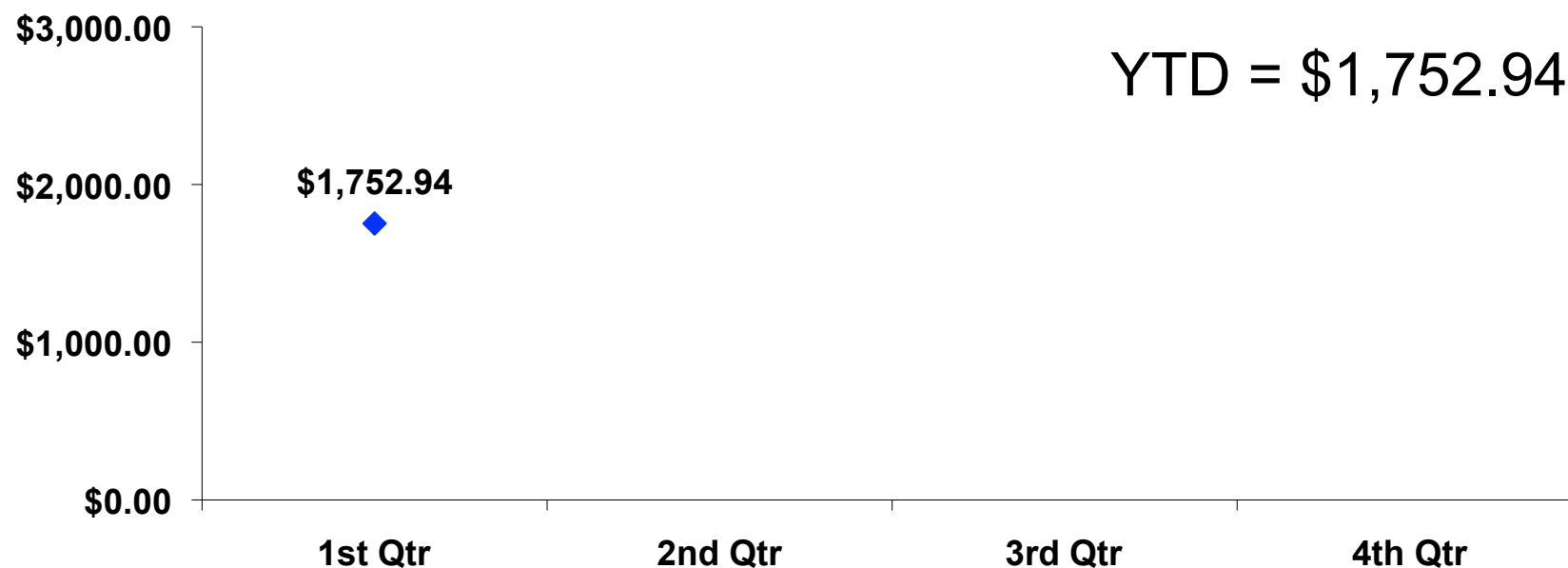
	MEAN \$
Air & Accommodation package only	\$5,748.51
Air & Accommodation w/ daily meal package	\$7,325.34
Air only	\$2,056.02
Accommodation only	\$875.01
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation - Russia	\$16.10
Ground transportation - Guam	\$-
Optional tours/ activities	\$-
Other expenses	\$-
Total Prepaid	\$5,516.10



# On-Island Expenditures

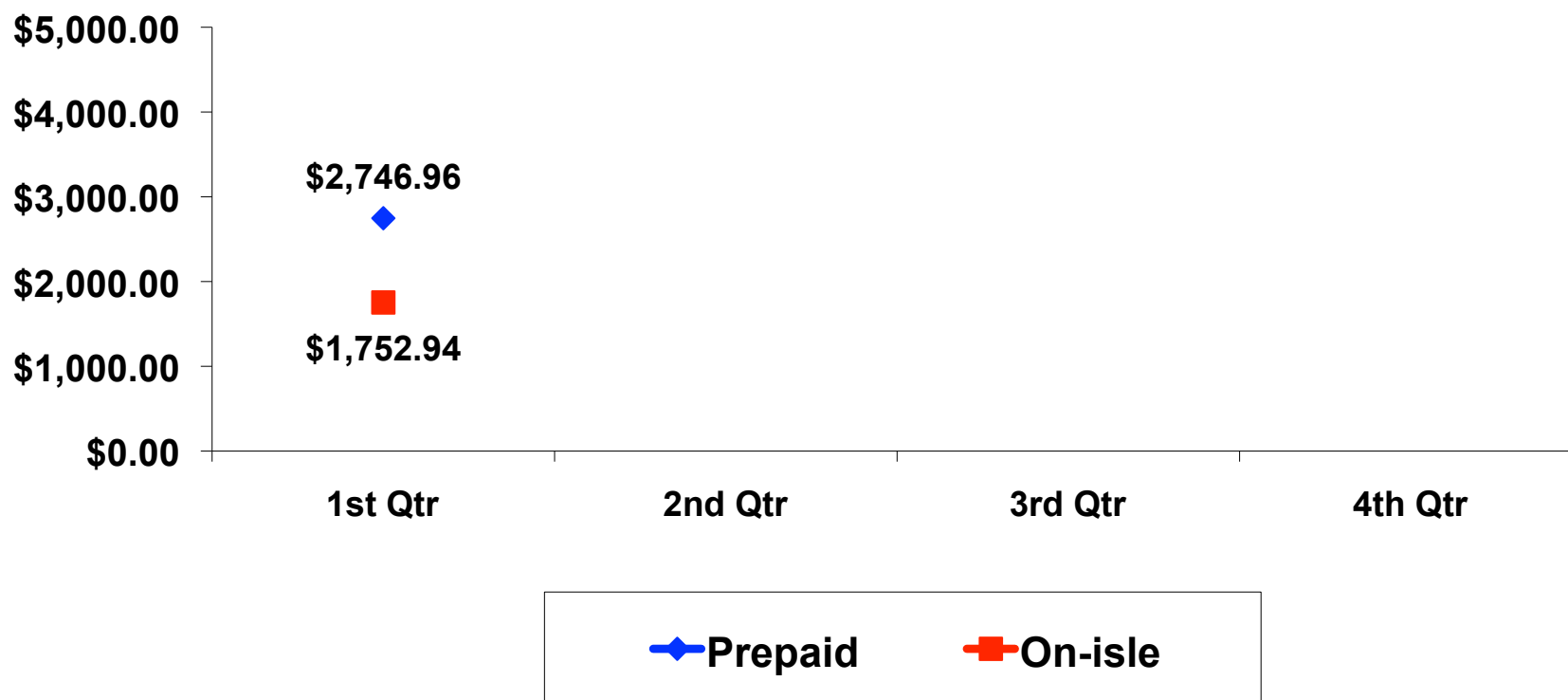
- \$3,441.19 = overall mean average on-island expense (for entire travel party size) by respondent
- \$650 = Minimum (lowest amount recorded for the entire sample)
- \$15,000 = Maximum (highest amount recorded for the entire sample)
- \$1,752.94 = overall mean average per person on-island expenditure

# On-Island Expenditures Per Person



# Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$2,746.96      On-Island YTD = \$1,752.94



# Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
					AGE				AGE			
					18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
ONISLE	Mean	\$1,752.94	\$1,705.32	\$1,803.87	\$1,000.00	\$1,344.50	\$1,779.33	\$1,886.04	\$2,933.33	\$1,714.87	\$1,840.86	\$1,577.00
	Median	\$1,575	\$1,525	\$1,633	\$1,000	\$1,249	\$1,650	\$1,750	\$2,933	\$1,583	\$1,675	\$1,420
	Minimum	\$323	\$323	\$450	\$1,000	\$667	\$323	\$638	\$2,933	\$633	\$450	\$500
	Maximum	\$6,250	\$6,250	\$5,000	\$1,000	\$2,450	\$6,250	\$3,000	\$2,933	\$3,480	\$5,000	\$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	\$423.76	\$450.19	\$395.49	\$1,050.00	\$312.50	\$452.68	\$432.73
	Median	\$250	\$200	\$275	\$1,050	\$175	\$250	\$325
F&B FF/STORE	Mean	\$78.01	\$53.56	\$104.17	\$0.00	\$98.10	\$70.12	\$84.09
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$482.45	\$511.36	\$451.53	\$400.00	\$447.50	\$492.50	\$477.27
	Median	\$350	\$500	\$300	\$400	\$300	\$450	\$325
OPT TOUR	Mean	\$377.08	\$425.06	\$325.76	\$600.00	\$375.25	\$365.67	\$425.91
	Median	\$300	\$320	\$200	\$600	\$225	\$310	\$225
GIFT- SELF	Mean	\$1,264.70	\$1,217.66	\$1,315.00	\$1,400.00	\$1,093.75	\$1,339.51	\$1,143.18
	Median	\$1,000	\$1,000	\$1,000	\$1,400	\$950	\$1,000	\$625
GIFT- OTHER	Mean	\$442.01	\$426.36	\$458.75	\$800.00	\$380.75	\$461.34	\$445.45
	Median	\$300	\$300	\$300	\$800	\$300	\$300	\$300
TRANS	Mean	\$203.64	\$216.27	\$190.14	\$150.00	\$171.50	\$224.55	\$177.73
	Median	\$150	\$150	\$138	\$150	\$90	\$150	\$110
OTHER	Mean	\$182.22	\$190.99	\$172.85	\$500.00	\$177.65	\$187.99	\$160.45
	Median	\$100	\$100	\$100	\$500	\$100	\$100	\$100
TOTAL	Mean	\$3,441.19	\$3,490.94	\$3,387.99	\$5,400.00	\$2,967.22	\$3,600.46	\$3,355.91
	Median	\$2,950	\$3,000	\$2,755	\$5,400	\$2,625	\$3,145	\$2,450

# On-Island Expenditures

## First Timers & Repeaters

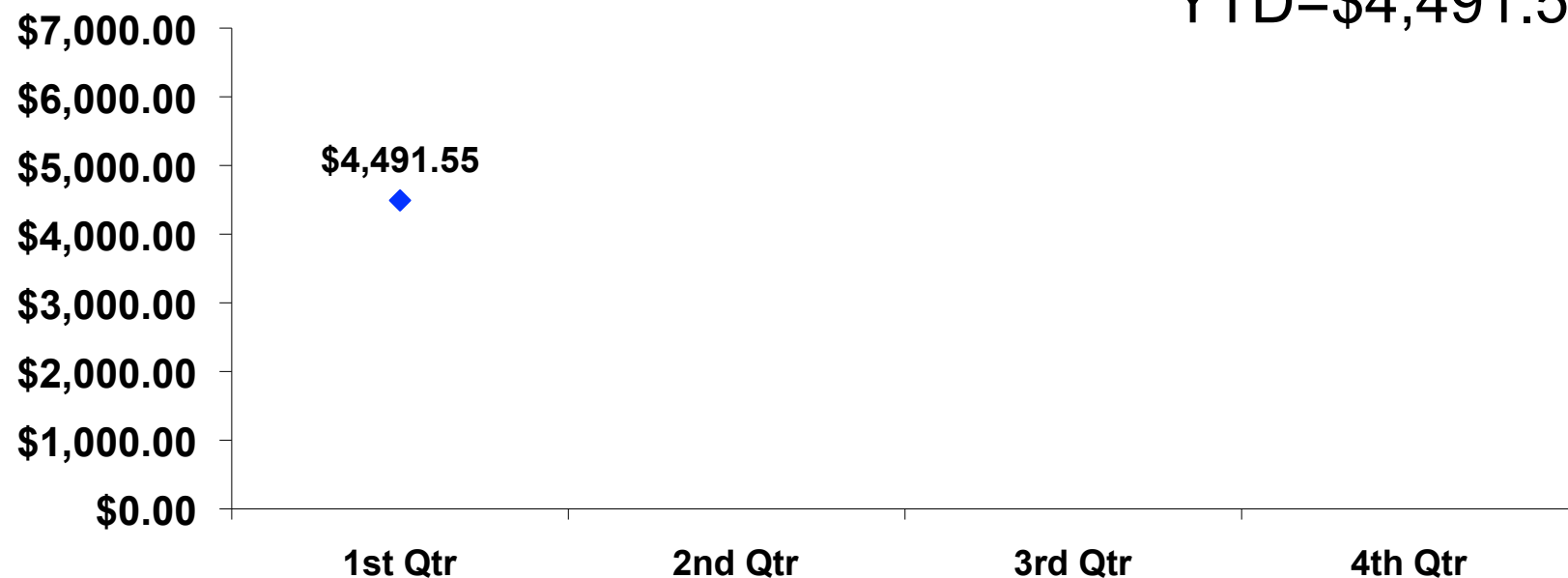
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$423.76	\$410.63	\$518.18
	Median	\$250	\$250	\$450
F&B FF/STORE	Mean	\$78.01	\$63.29	\$165.91
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$482.45	\$461.79	\$554.55
	Median	\$350	\$350	\$475
OPT TOUR	Mean	\$377.08	\$352.66	\$488.64
	Median	\$300	\$275	\$360
GIFT- SELF	Mean	\$1,264.70	\$1,086.83	\$1,886.36
	Median	\$1,000	\$800	\$2,000
GIFT- OTHER	Mean	\$442.01	\$410.00	\$600.00
	Median	\$300	\$300	\$375
TRANS	Mean	\$203.64	\$197.52	\$234.32
	Median	\$150	\$125	\$200
OTHER	Mean	\$182.22	\$176.20	\$170.45
	Median	\$100	\$100	\$100
TOTAL	Mean	\$3,441.19	\$3,135.97	\$4,663.86
	Median	\$2,950	\$2,675	\$4,750

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

- \$4,491.55 = overall average
- \$500 = Minimum (lowest amount recorded for the entire sample)
- \$10,110 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures Per Person

YTD=\$4,491.55



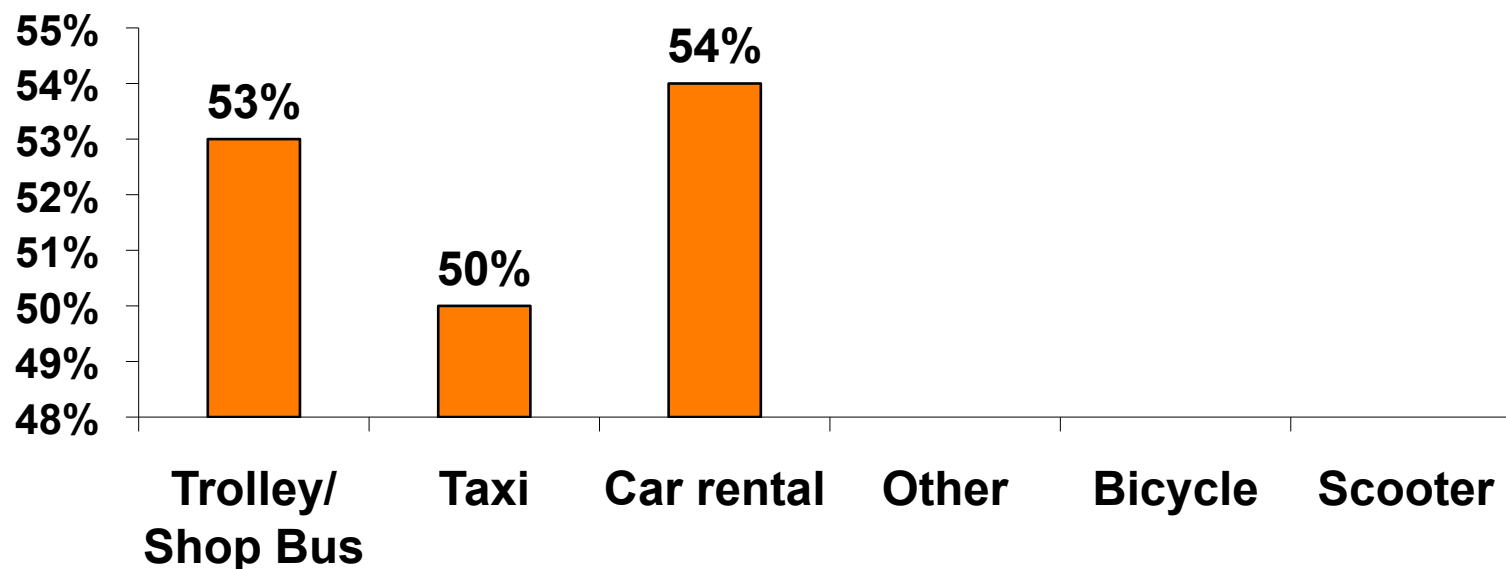


# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$423.76
Food & beverage in fast food restaurant/ convenience store	\$78.01
Food & beverage at restaurants or drinking establishments outside a hotel	\$482.45
Optional tours and activities	\$377.08
Gifts/ souvenirs for yourself/companions	\$1,264.70
Gifts/ souvenirs for friends/family at home	\$442.01
Local transportation	\$203.64
Other expenses not covered	\$182.22
<b>Average Total</b>	<b>\$3,441.19</b>

# Local Transportation

n=119



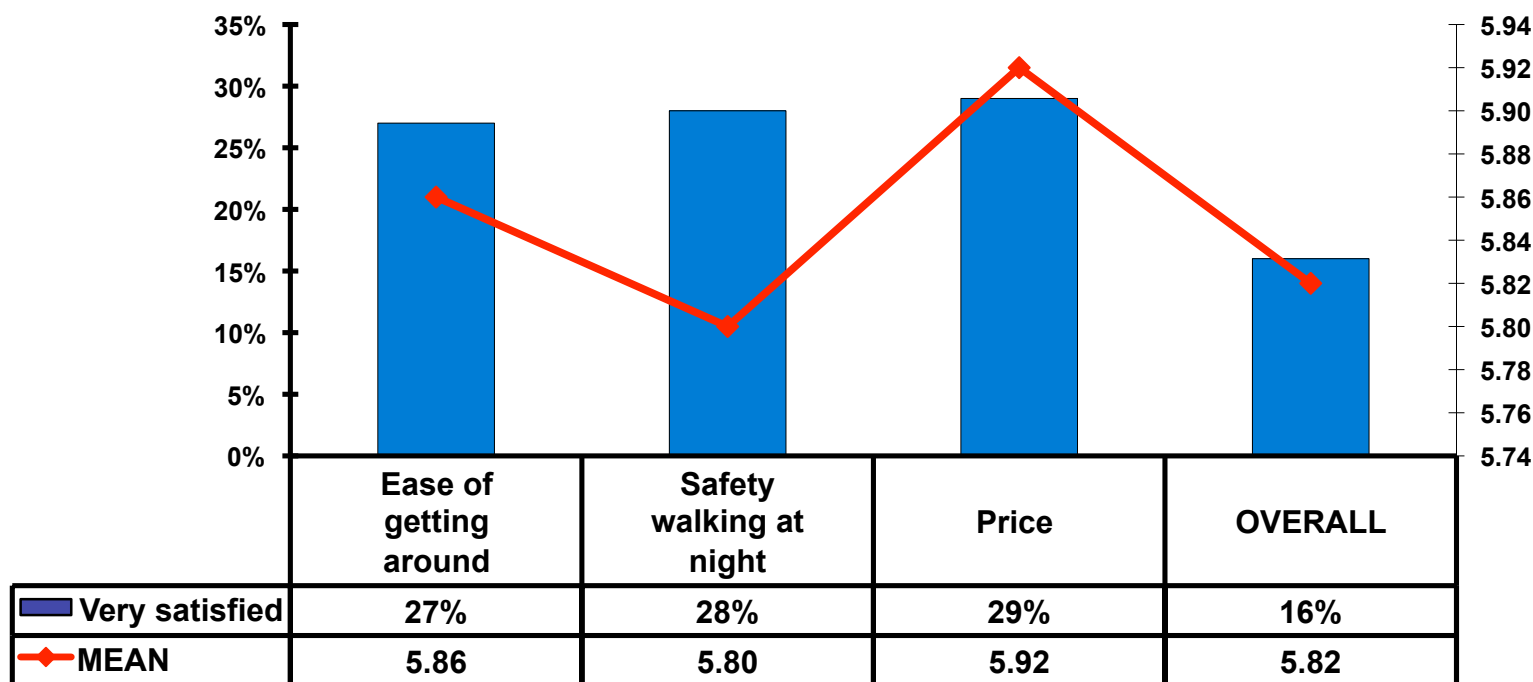
**Mean=\$203.64 per travel party**

# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

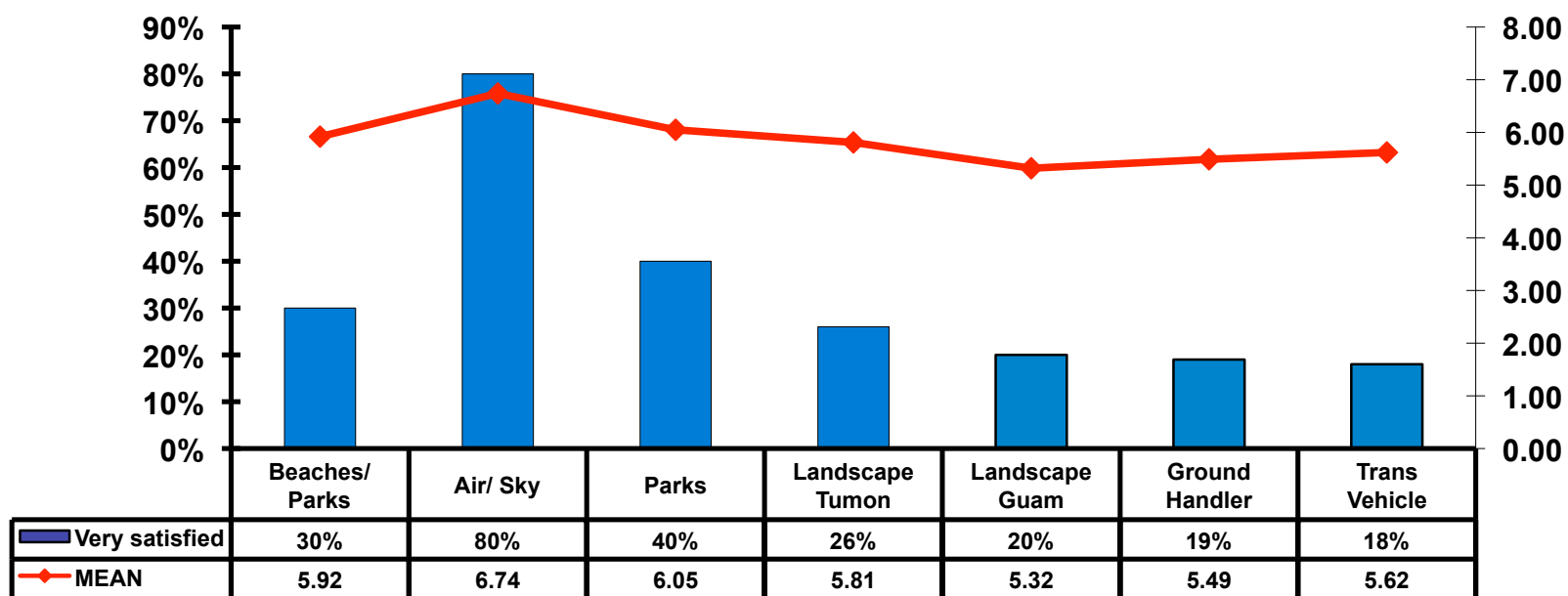
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

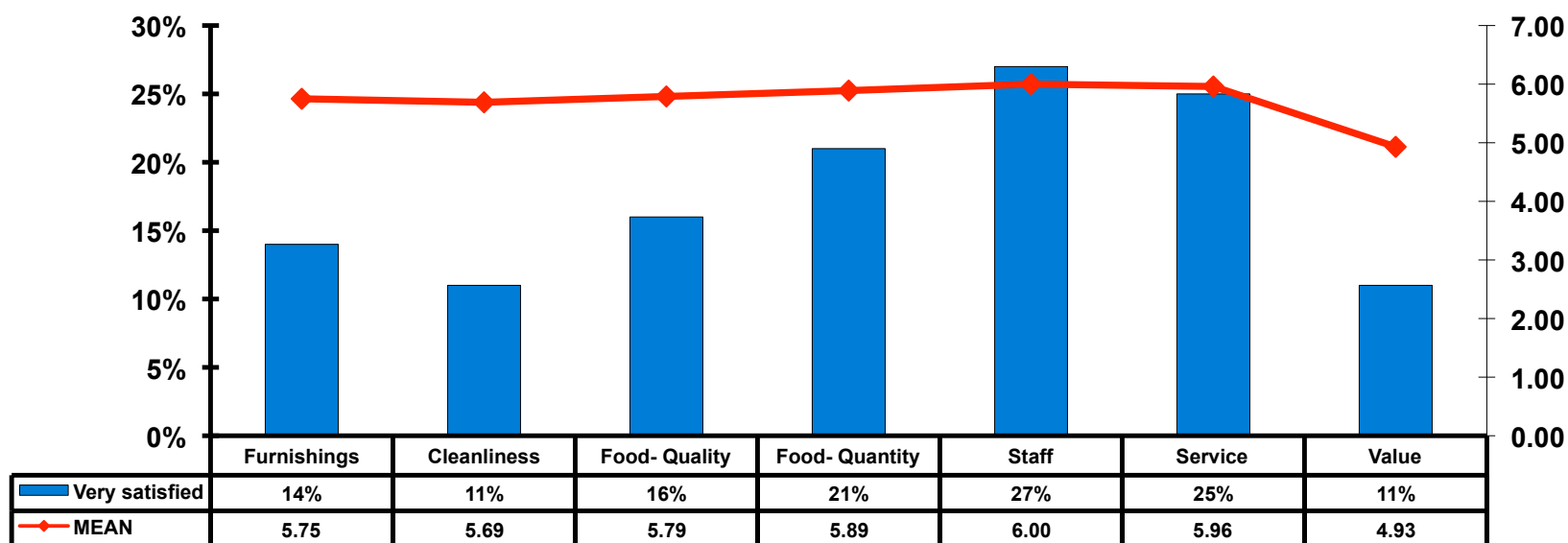
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

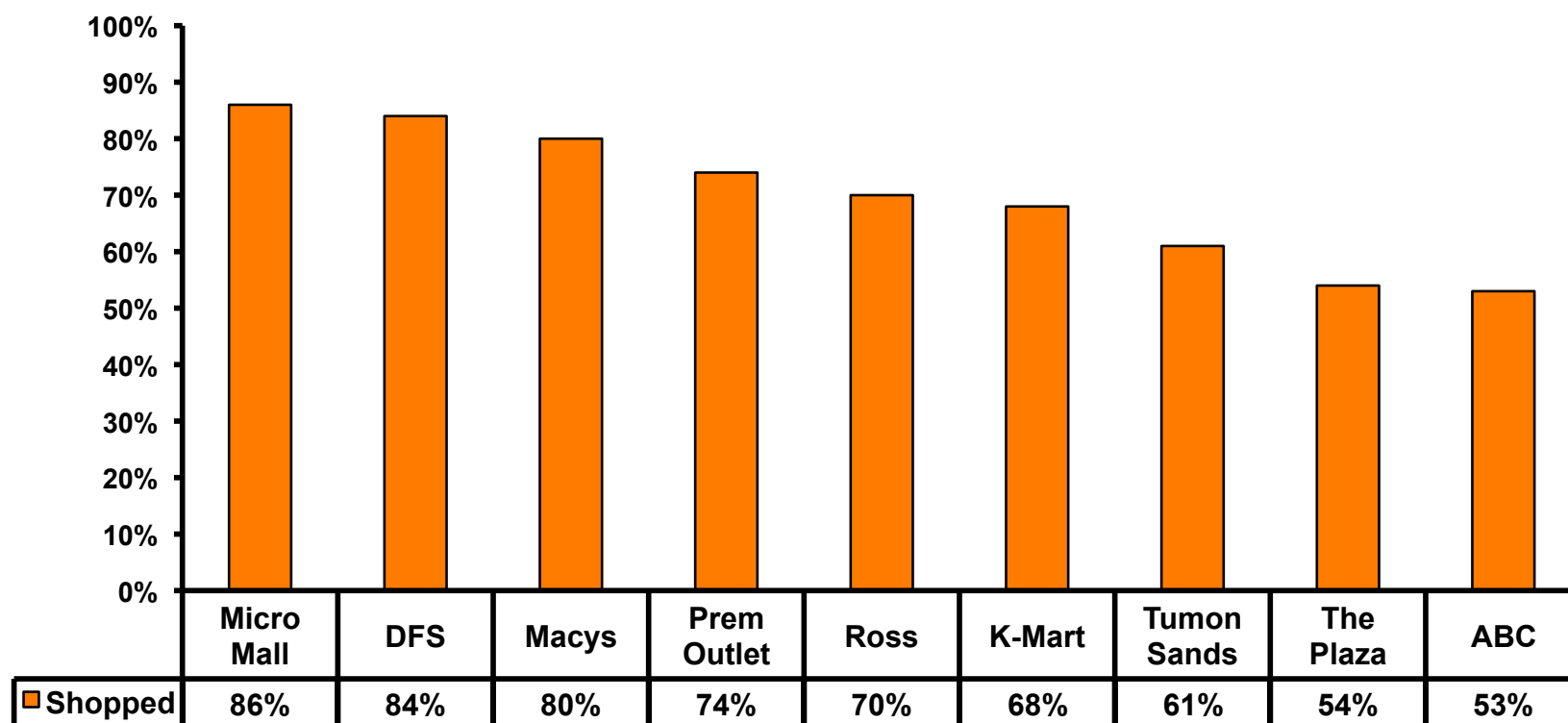
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses





# Satisfaction with Shopping

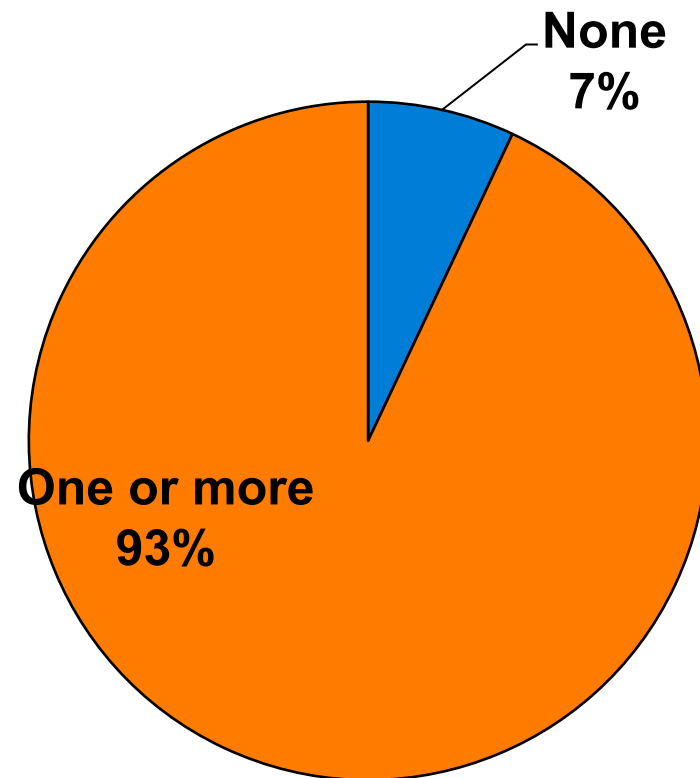
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>79%</b>	Score of 6 to 7 = <b>76%</b>
Score of 4 to 5 = <b>20%</b>	Score of 4 to 5 = <b>24%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 6.02</b>	<b>MEAN = 5.95</b>

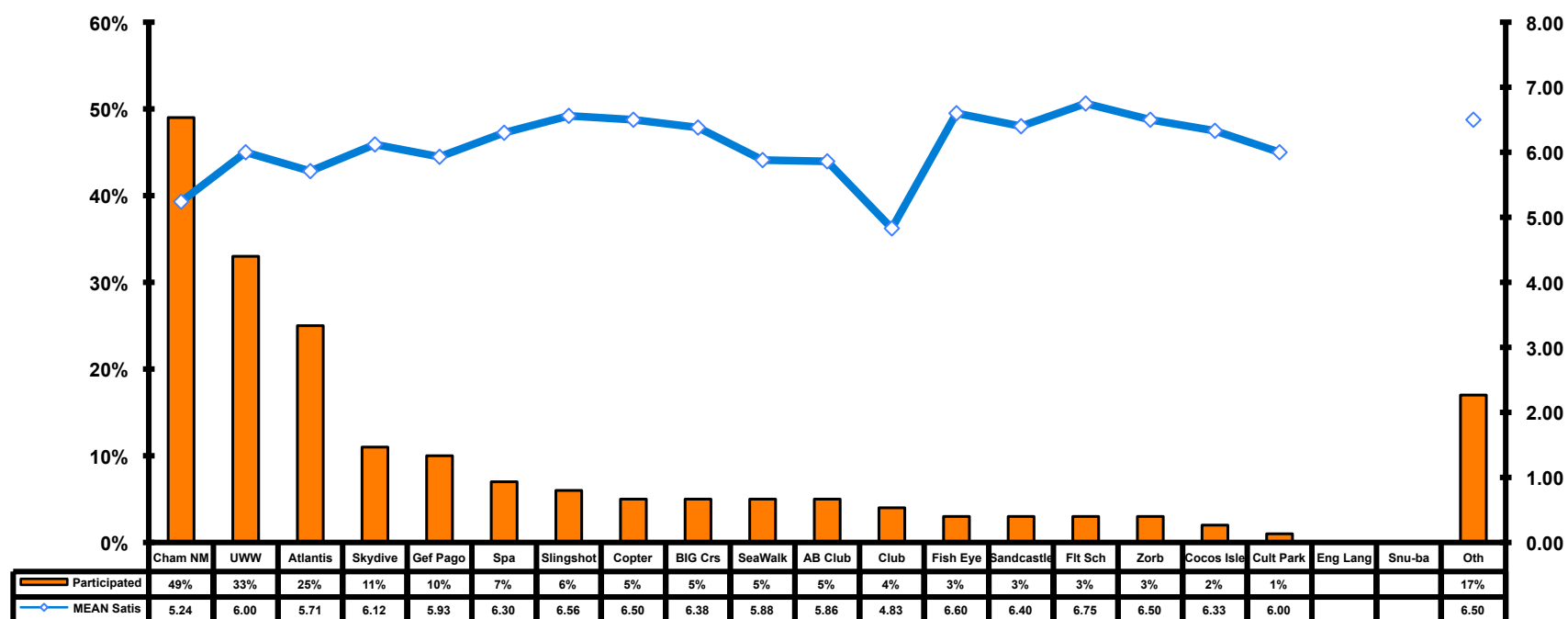
# Optional Tour Participation

- Average number of tours participated in is 2.47



# Optional Tours

## Participation & Satisfaction



# Day Tours Satisfaction

**7pt Rating Scale**

**7=Very Satisfied/ 1=Very Dissatisfied**

<b>Quality of Day Tour</b>	<b>Variety of Day Tour</b>
Score of 6 to 7 = <b>62%</b>	Score of 6 to 7 = <b>35%</b>
Score of 4 to 5 = <b>36%</b>	Score of 4 to 5 = <b>52%</b>
Score 1 to 3 = <b>3%</b>	Score 1 to 3 = <b>13%</b>
<b>MEAN = 5.66</b>	<b>MEAN = 4.84</b>

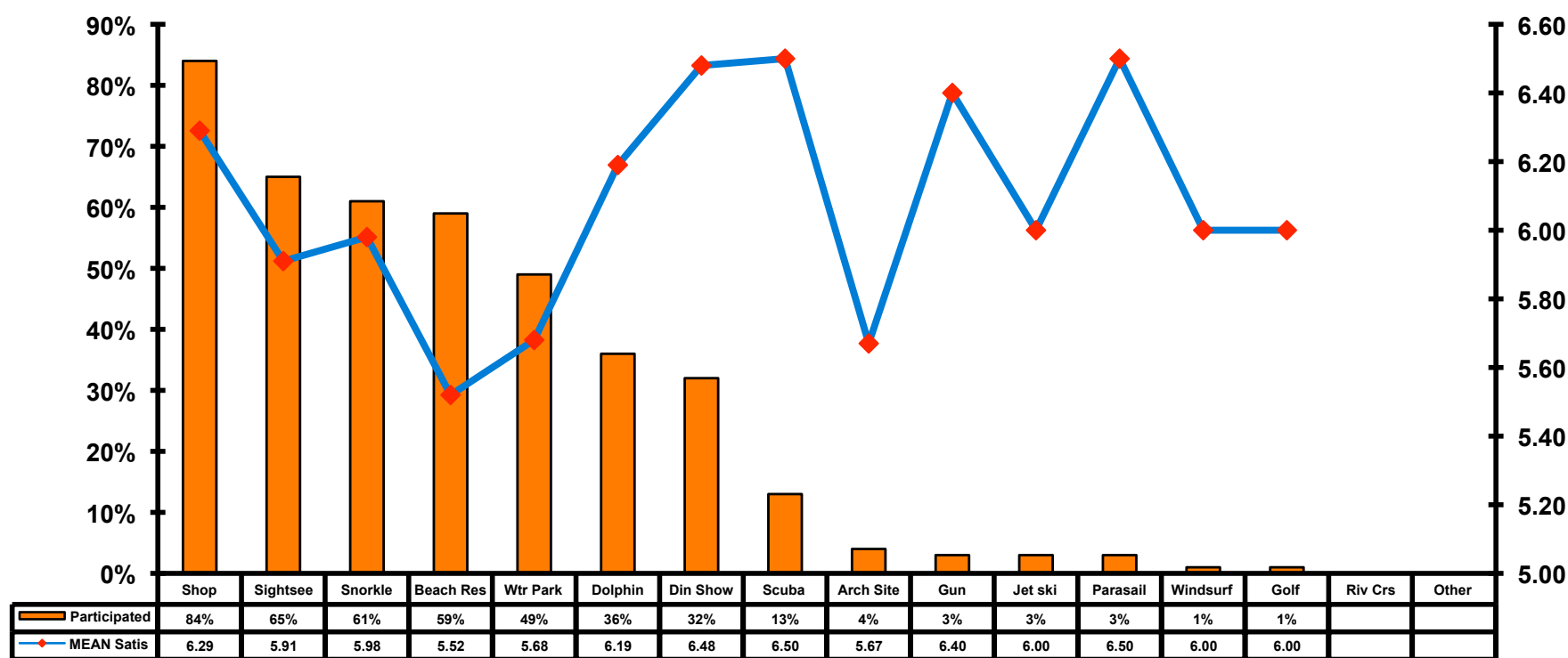
# Night Tours Satisfaction

7pt Rating Scale

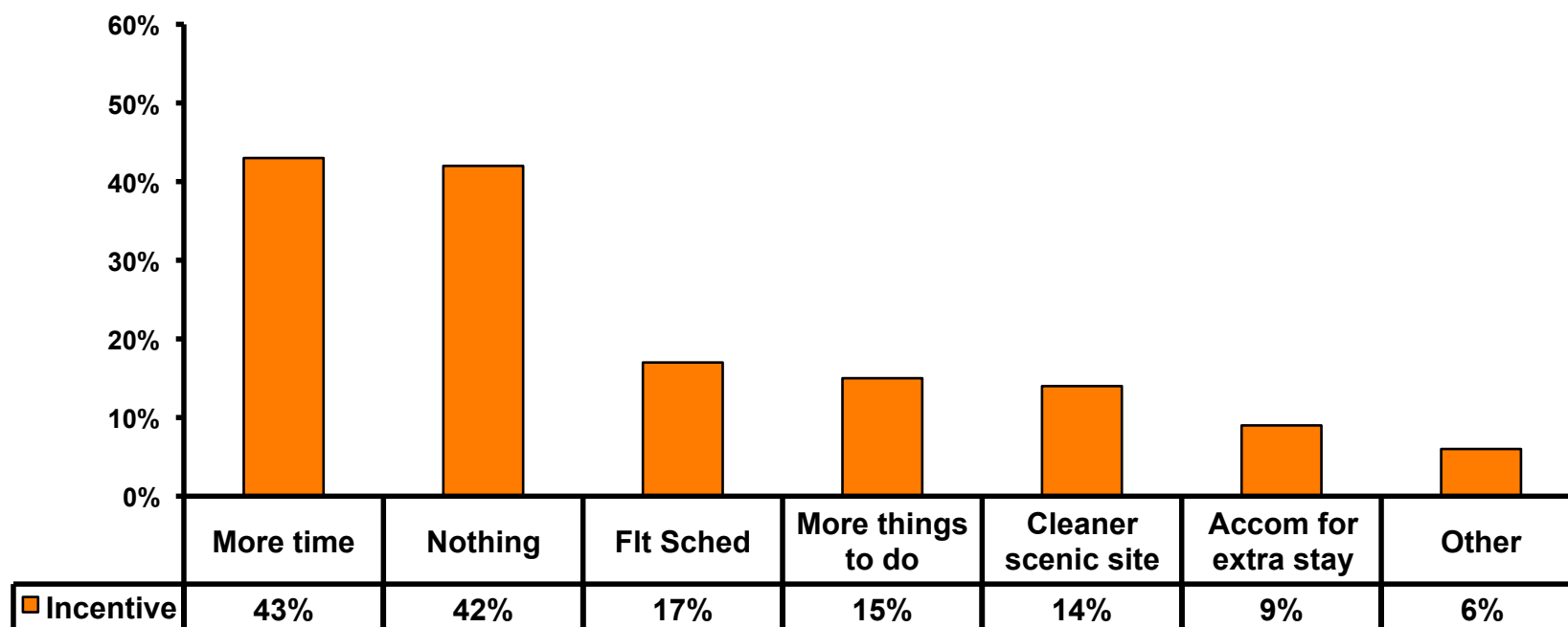
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>25%</b>	Score of 6 to 7 = <b>26%</b>
Score of 4 to 5 = <b>61%</b>	Score of 4 to 5 = <b>52%</b>
Score 1 to 3 = <b>15%</b>	Score 1 to 3 = <b>22%</b>
<b>MEAN = 4.57</b>	<b>MEAN = 4.46</b>

# Satisfaction with Other Activities



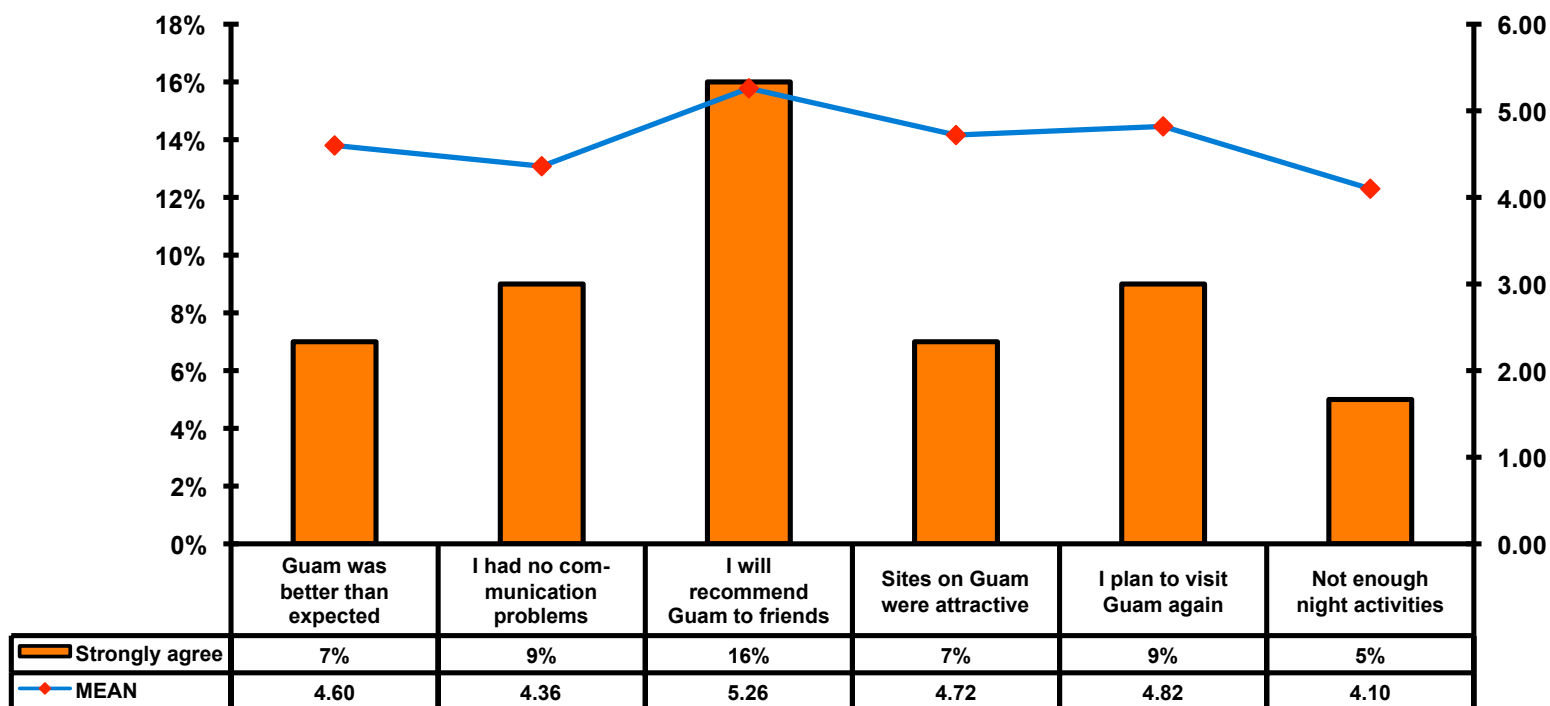
# What would it take to make Guam more enjoyable for families?



# On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

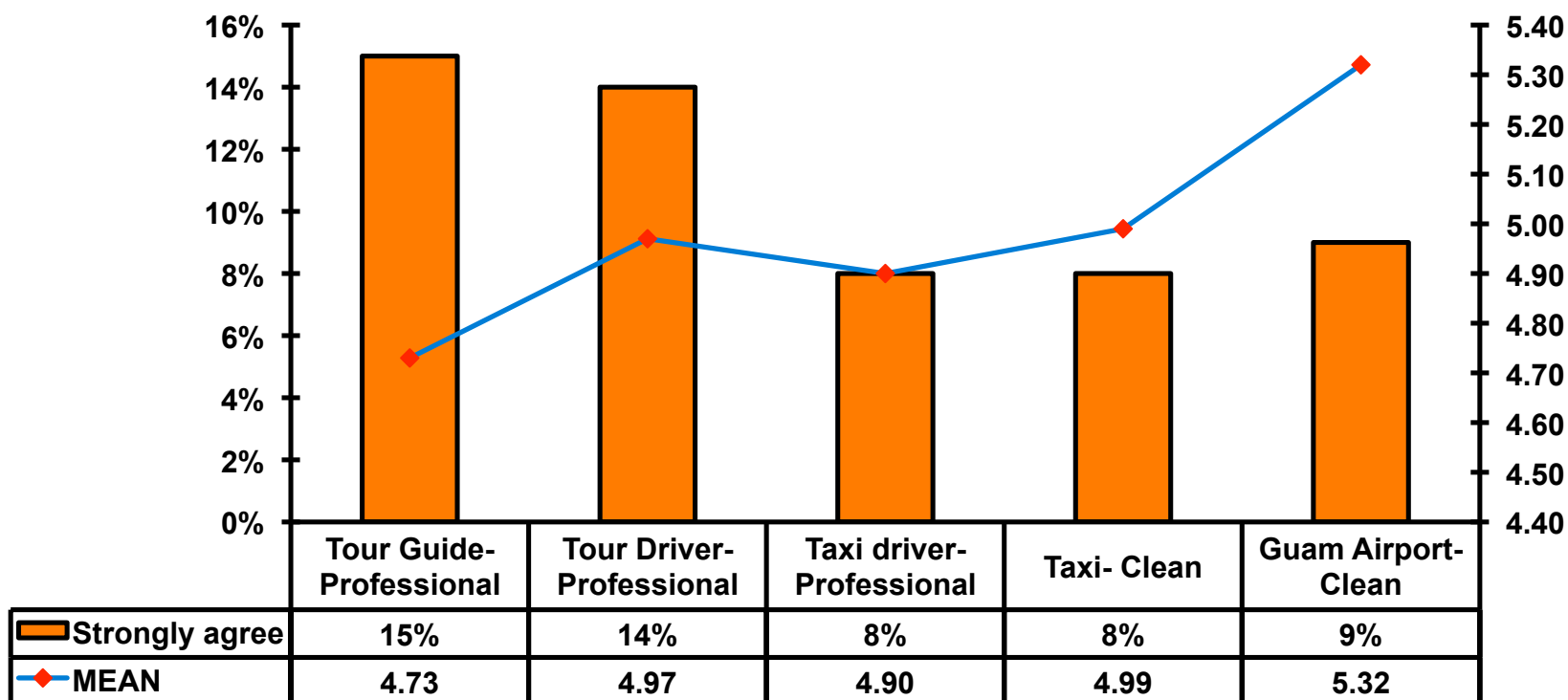




# Transportation

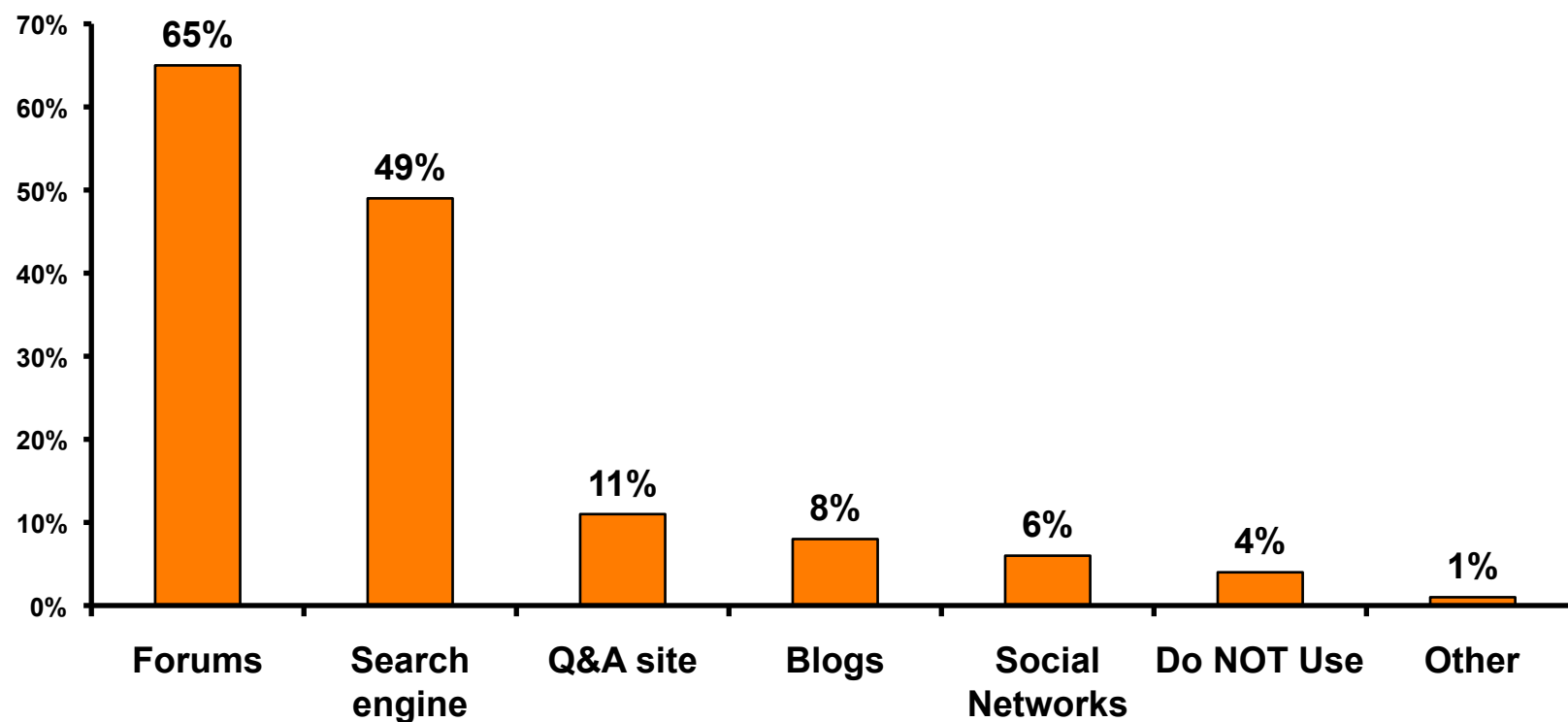
7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



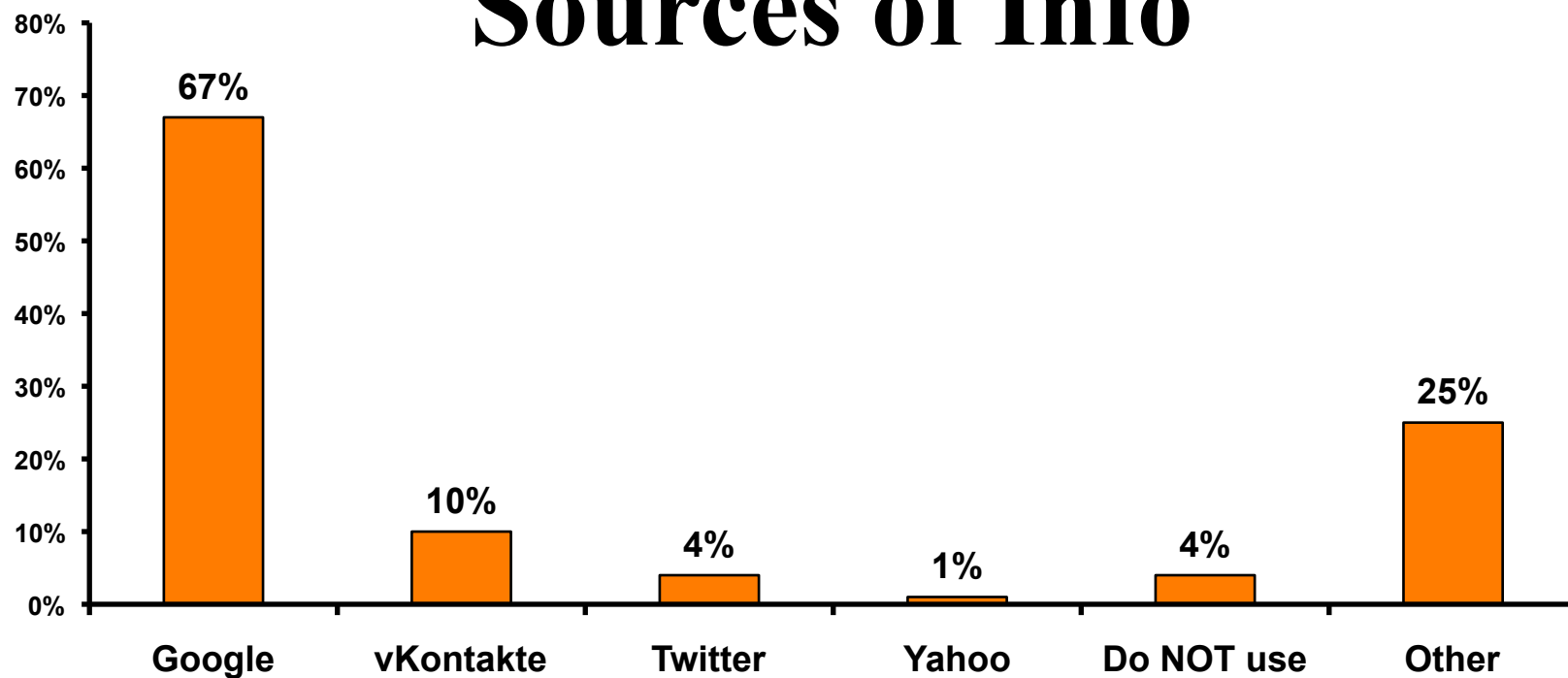
# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info

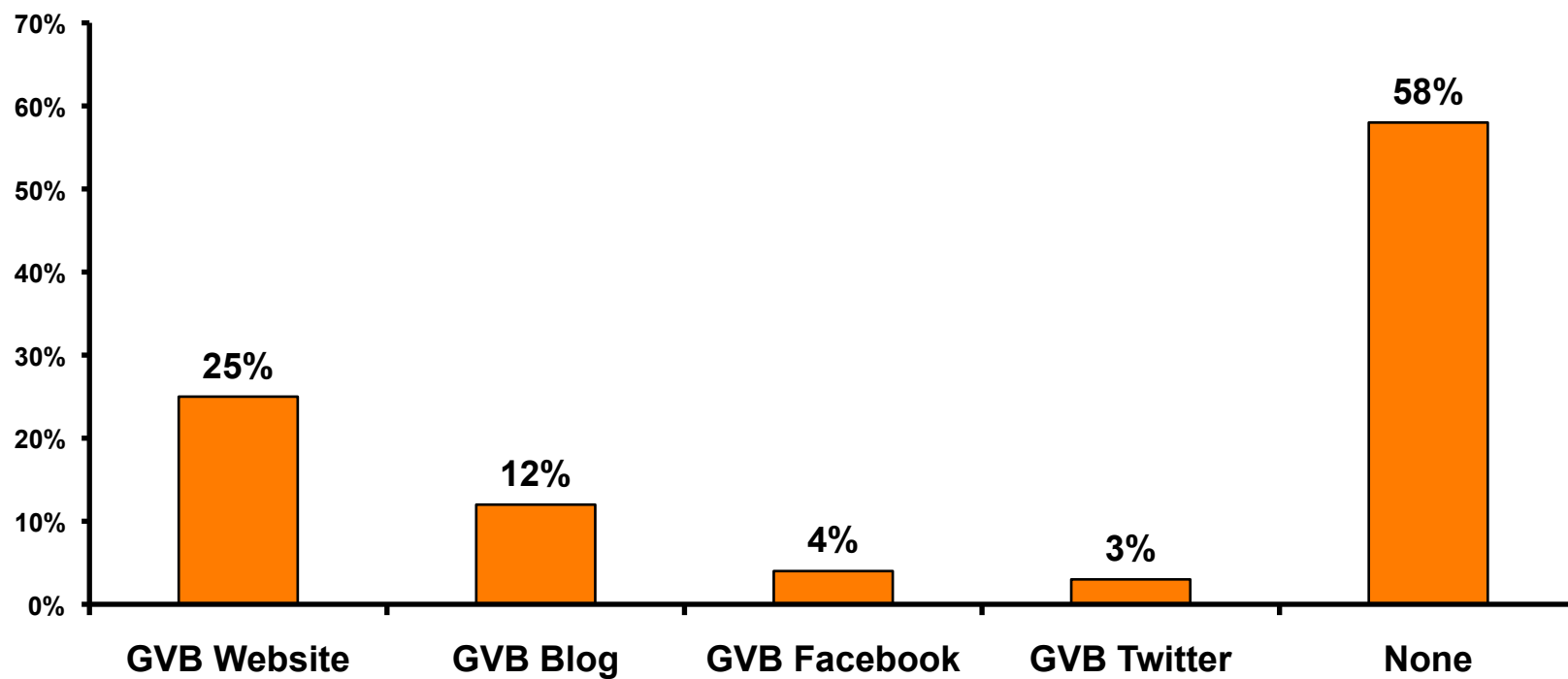


# Internet- Things To Do

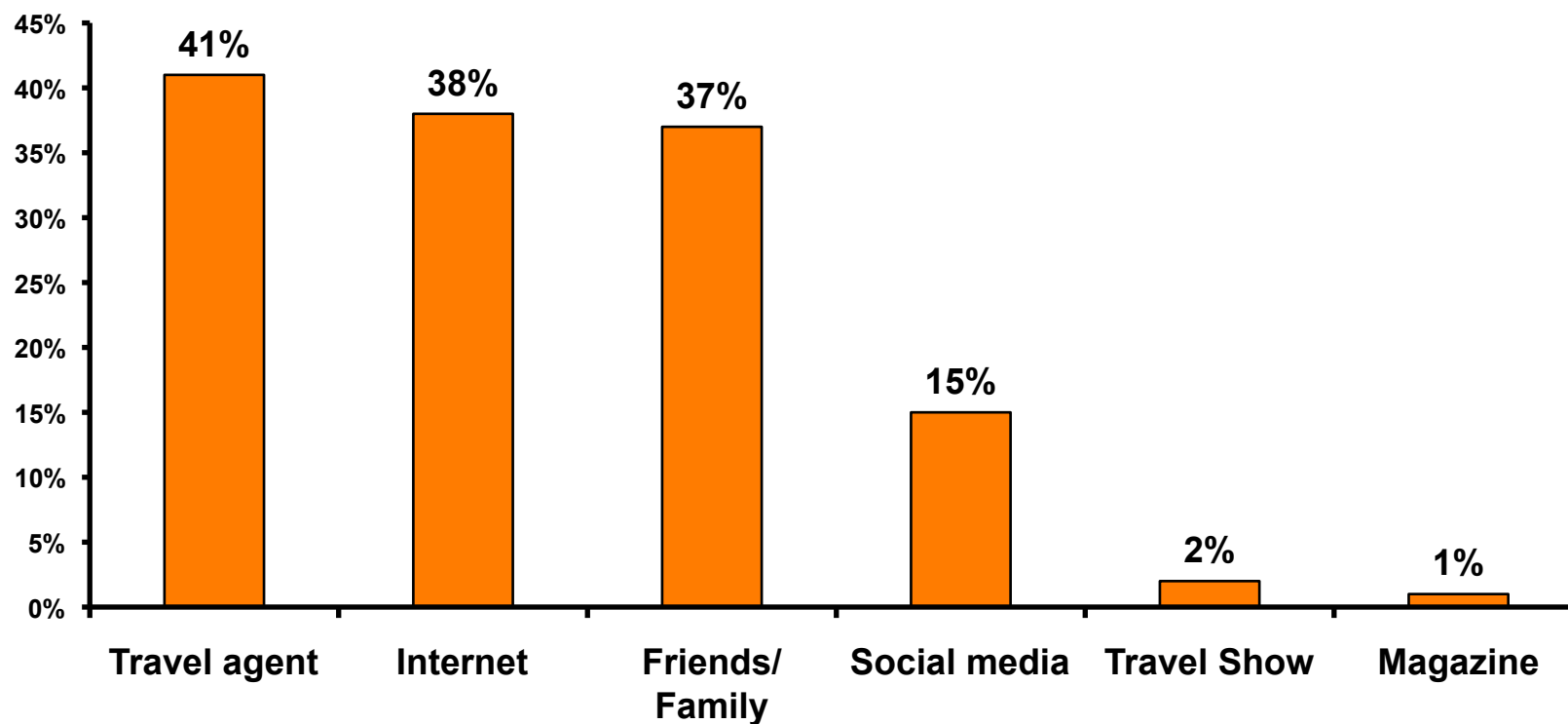
## Sources of Info



# Internet- GVB Sources

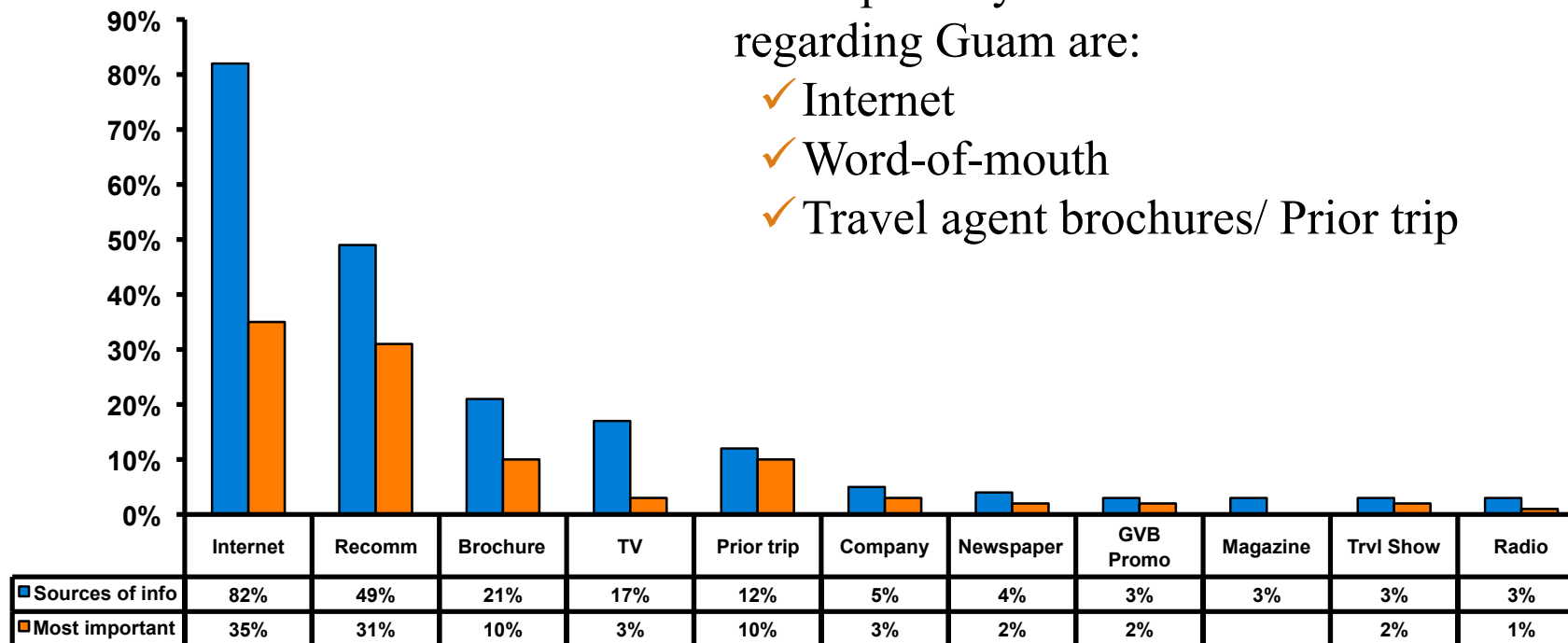


# Travel Motivation- Info Sources



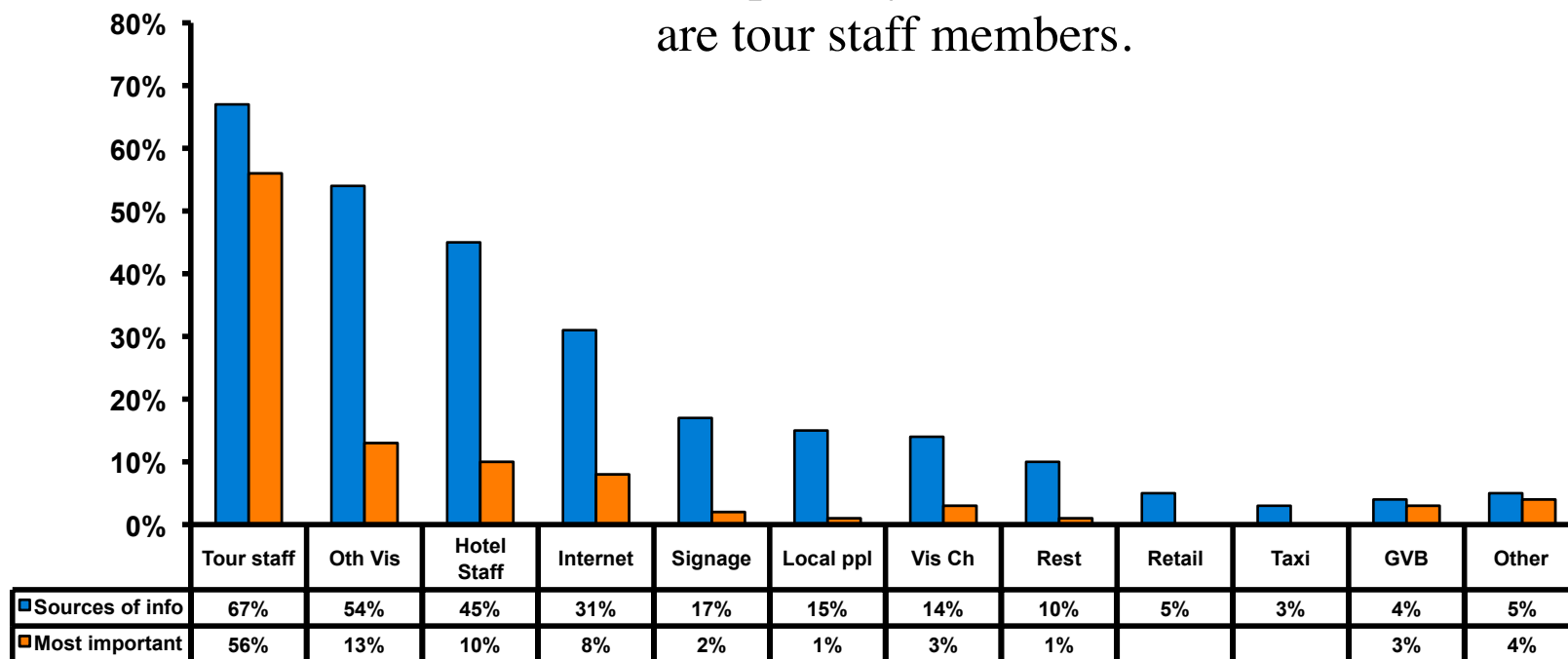
# Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
  - ✓ Internet
  - ✓ Word-of-mouth
  - ✓ Travel agent brochures/ Prior trip



# Sources of Information Post-arrival

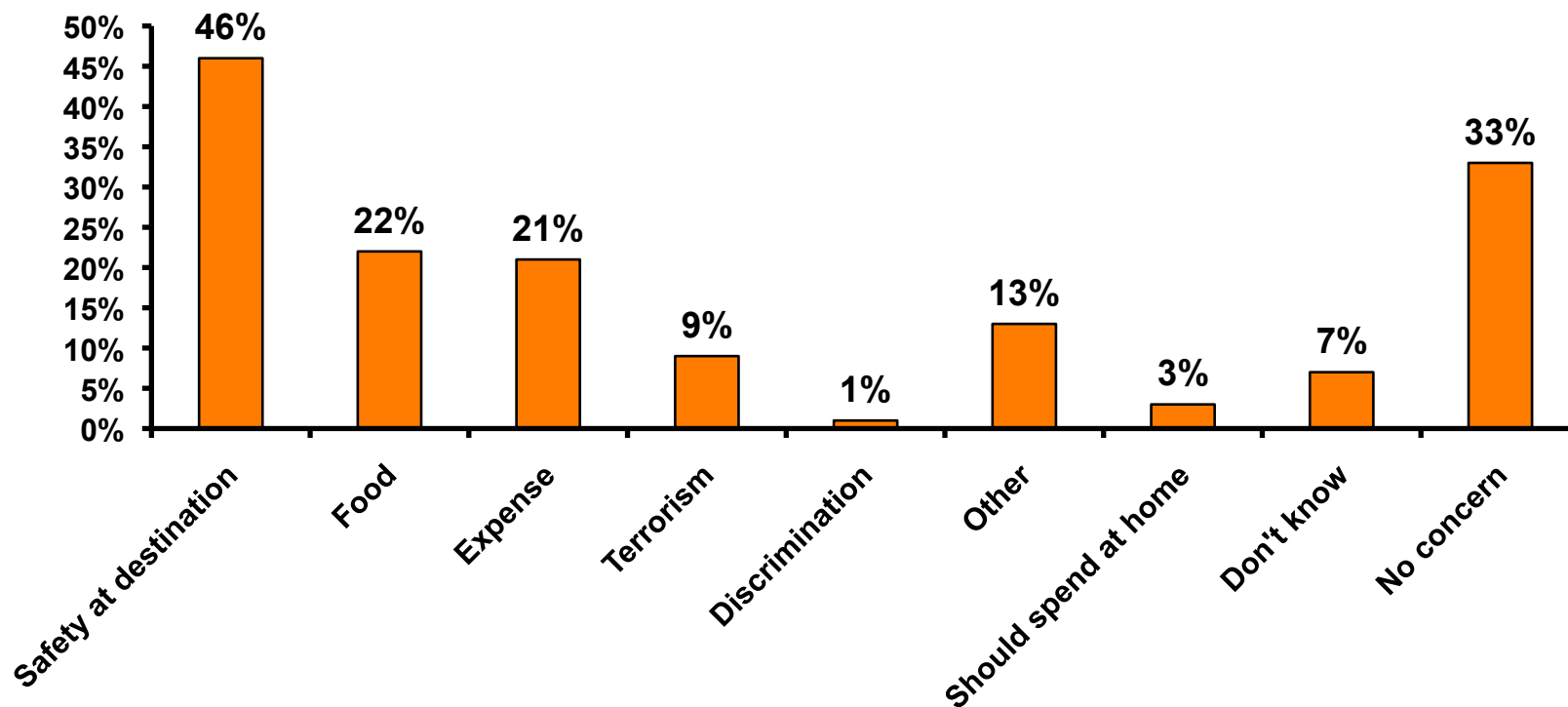
- The primary local source of information are tour staff members.





# SECTION 6 **OTHER ISSUES**

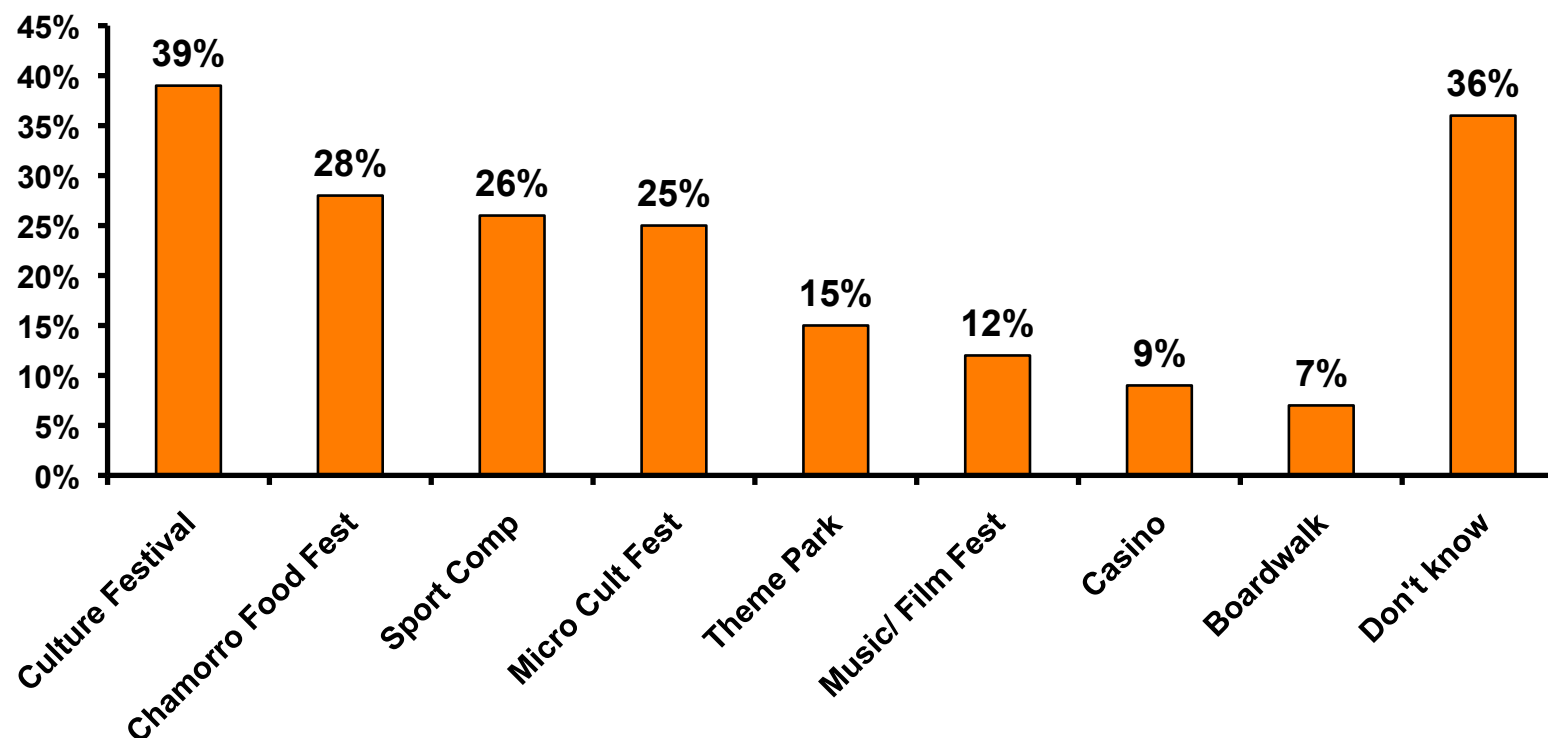
# Concerns about travel outside of Russia - Overall



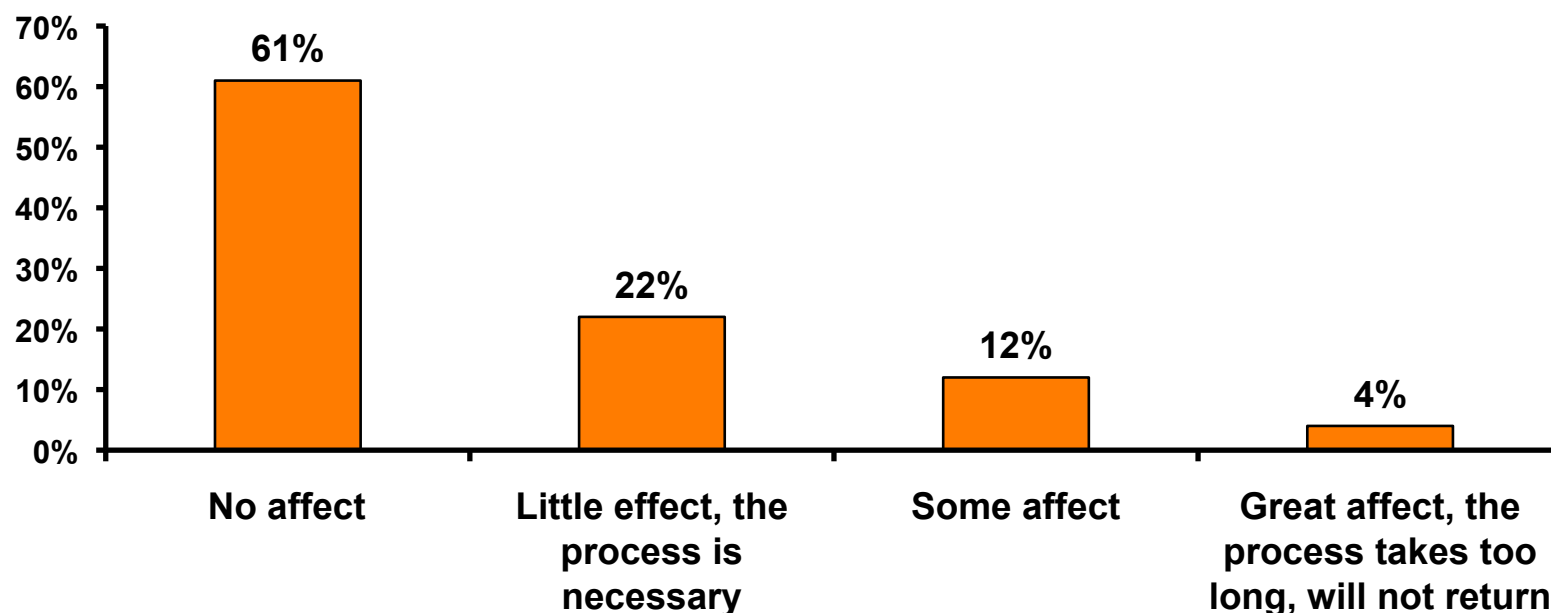
# Concerns about travel outside of Russia - By Age & Income

		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	Safety	46%	100%	38%	46%	50%	48%	49%	44%	54%	22%	50%	25%	
	No concerns	33%		35%	30%	45%	13%	31%	46%	15%	56%	75%	25%	
	Food	22%	50%	20%	26%	5%	13%	20%	23%	38%	33%		50%	
	Expense	21%	50%	20%	21%	18%	30%	20%	26%	8%	22%	25%		
	Other	13%	50%	8%	13%	18%	26%	13%	10%	8%				
	Terrorism	9%		5%	10%	14%	13%	7%	8%	23%				
	Don't know	7%		10%	6%	5%	9%	11%		15%				
	Should spend at home	3%			5%		9%	5%						
	Discrimination against Russians	1%		5%			4%				11%			
	Total	Count	149	2	40	82	22	23	55	39	13	9	4	4

# Activities/ Attractions- Appeal



# Security Screening/ Immigration Process at Guam International Airport



# Airport Arrival Experience

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

