



# GUAM VISITORS BUREAU

## Russia Visitor Tracker Exit Profile

### FY2013

### 2ND Qtr. (JAN~MAR 2013)



**Prepared by: QMark Research**

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# Background & Methodology

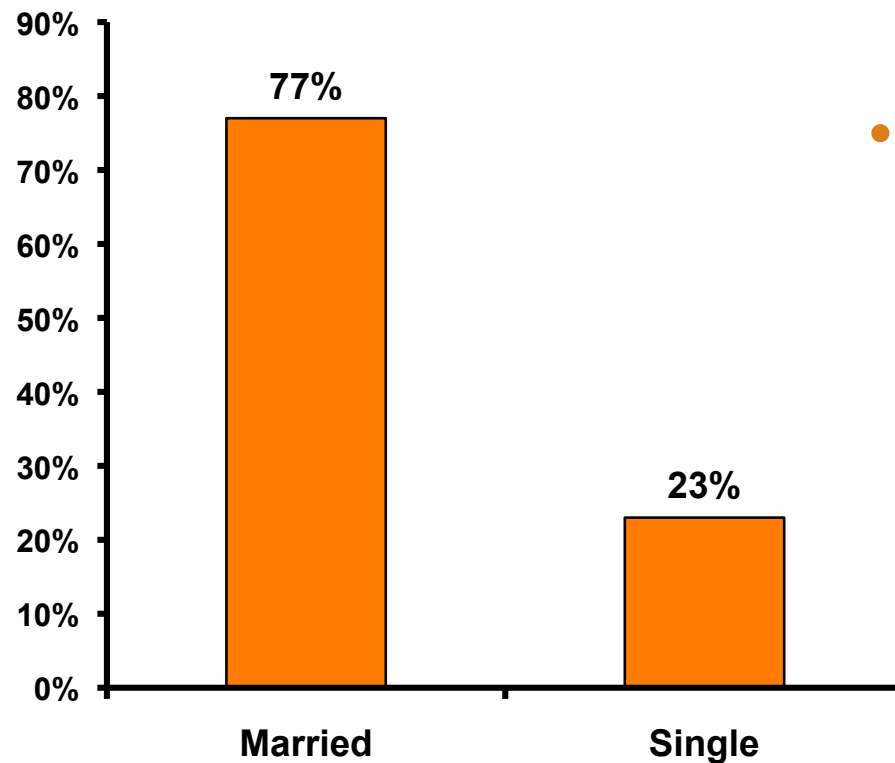
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **151** departing Russian visitors were randomly 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 **151** 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.

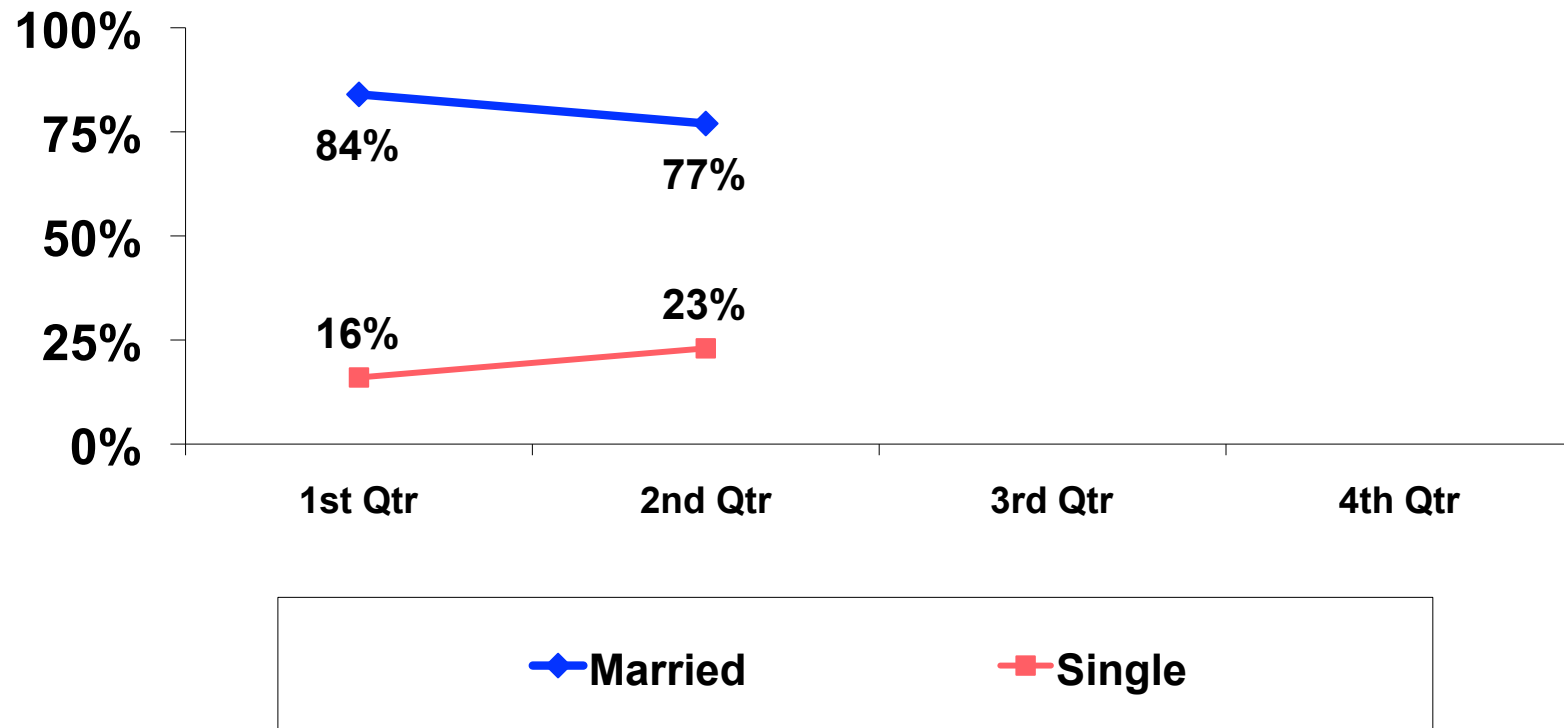
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

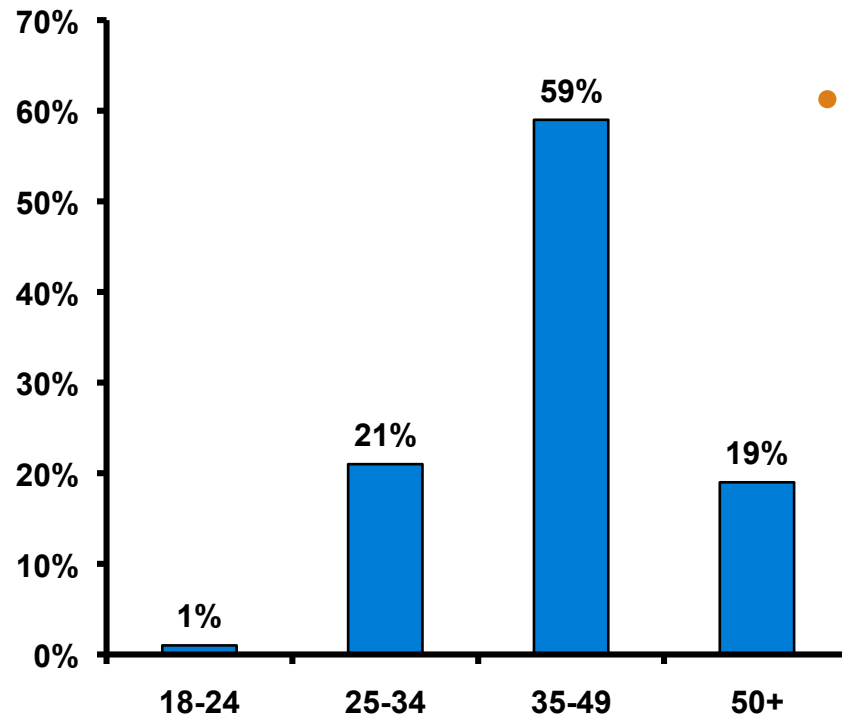


- Majority of Russian visitors are married.

# Marital Status

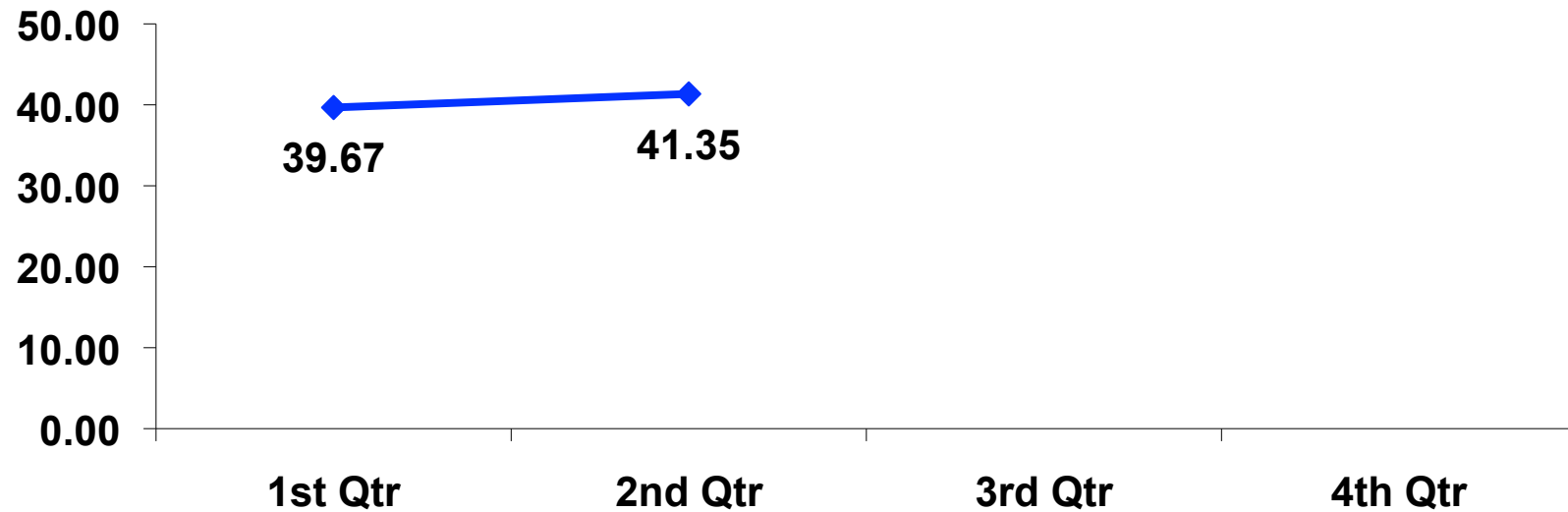


# Age - Overall



- The average age of the respondents is 41.35 years of age.

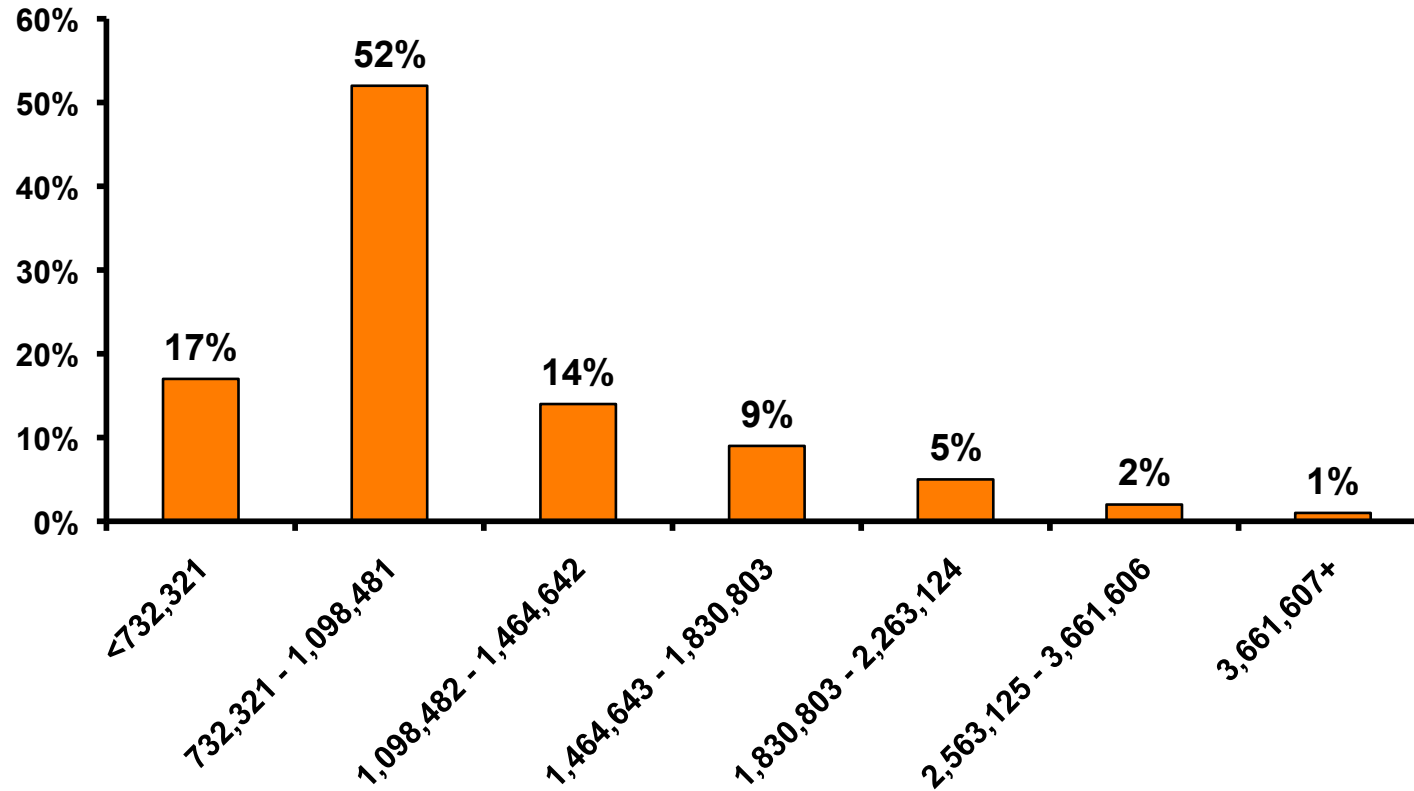
# Average Age



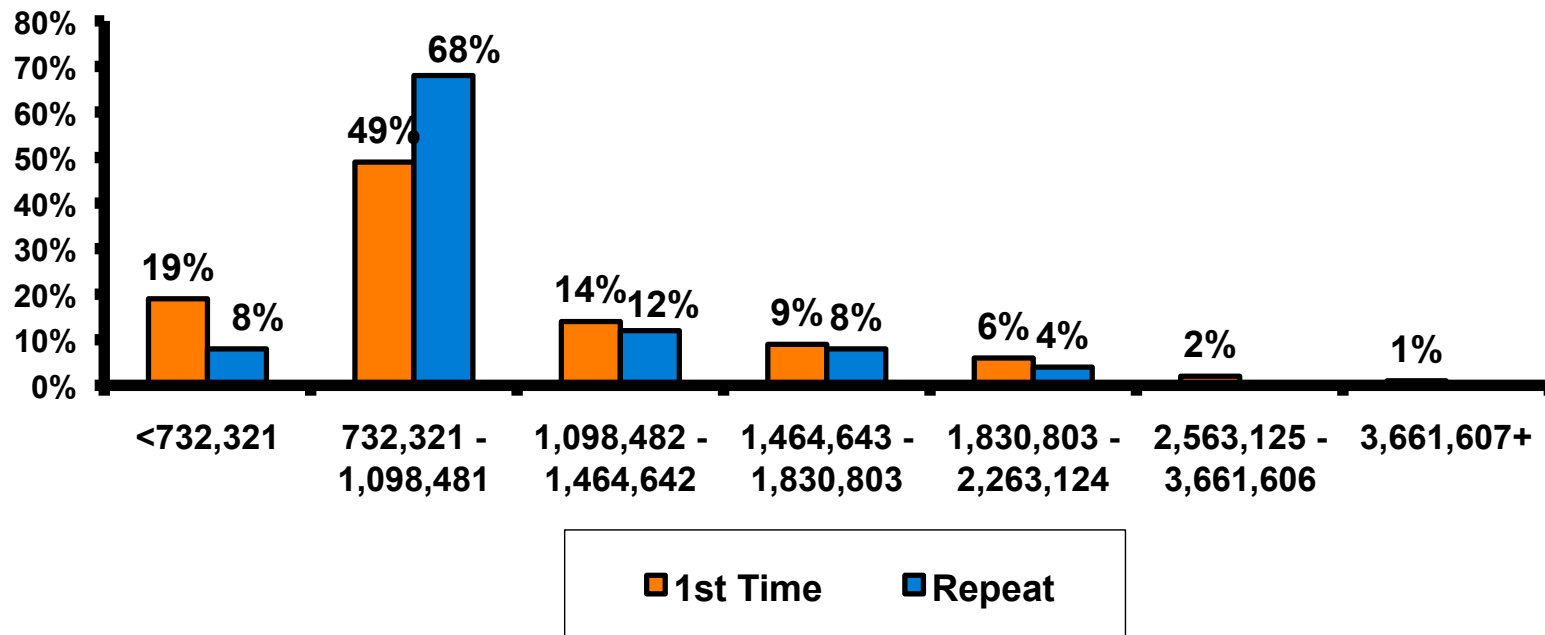


# Personal Income

Ruble 30.32=\$1



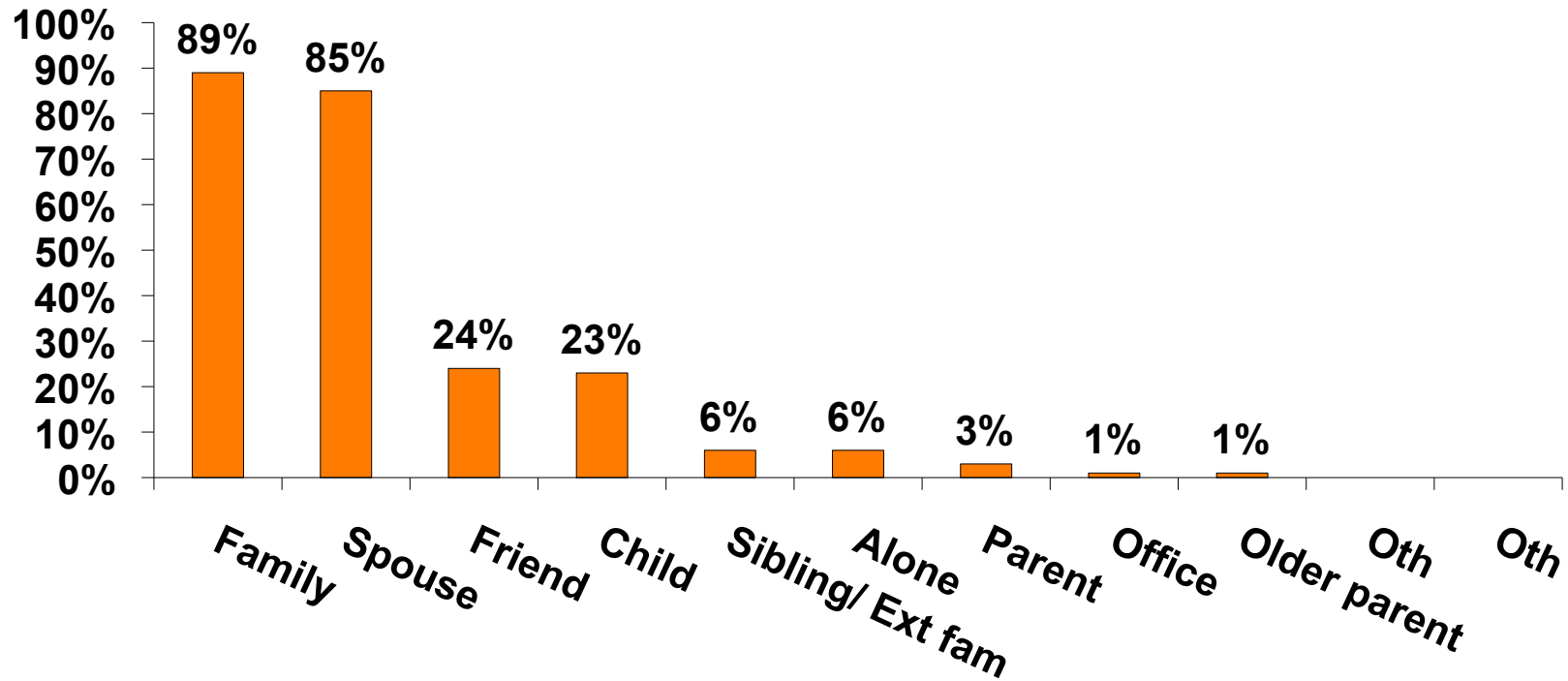
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q27	<732,321	Count	25	9	16	1	6	10	8
		Column N %	17%	13%	21%	100%	19%	12%	29%
	732,321-1,098,481	Count	77	35	42		15	49	12
		Column N %	52%	49%	56%		48%	57%	43%
	1,098,482-1,464,642	Count	20	11	9		6	11	3
		Column N %	14%	15%	12%		19%	13%	11%
	1,464,643-1,830,803	Count	13	7	6		2	8	3
		Column N %	9%	10%	8%		6%	9%	11%
	1,830,803-2,263,124	Count	8	6	2		2	6	
		Column N %	5%	8%	3%		6%	7%	
	2,563,125-3,661,606	Count	3	3				1	2
		Column N %	2%	4%				1%	7%
	3,661,607+	Count	1	1				1	
		Column N %	1%	1%				1%	
	No Income	Count							
		Column N %							

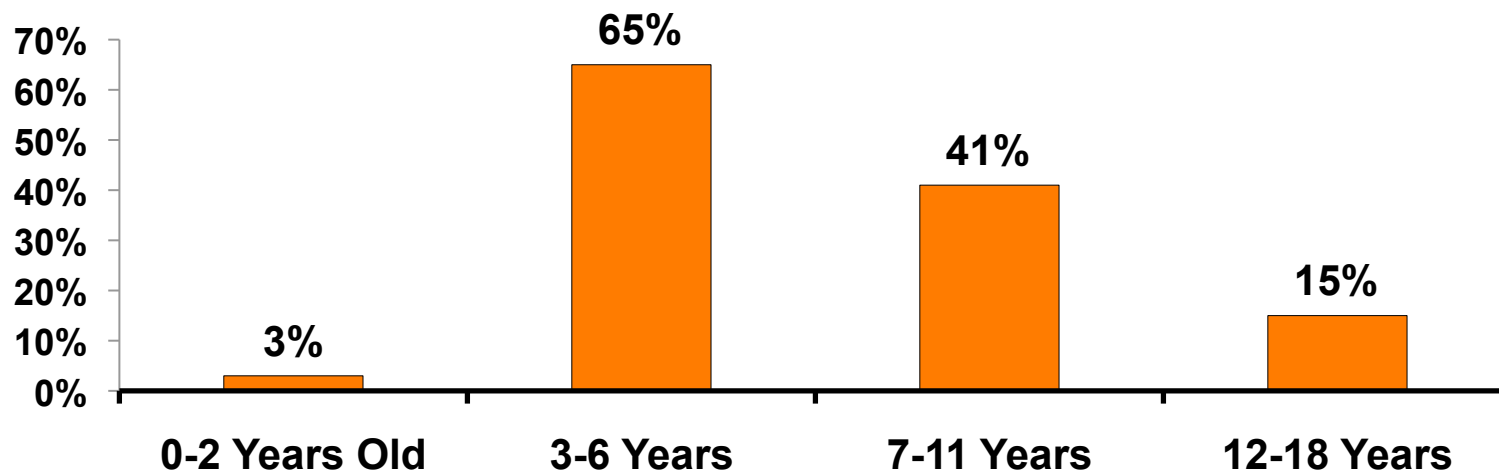
# Travel Companions



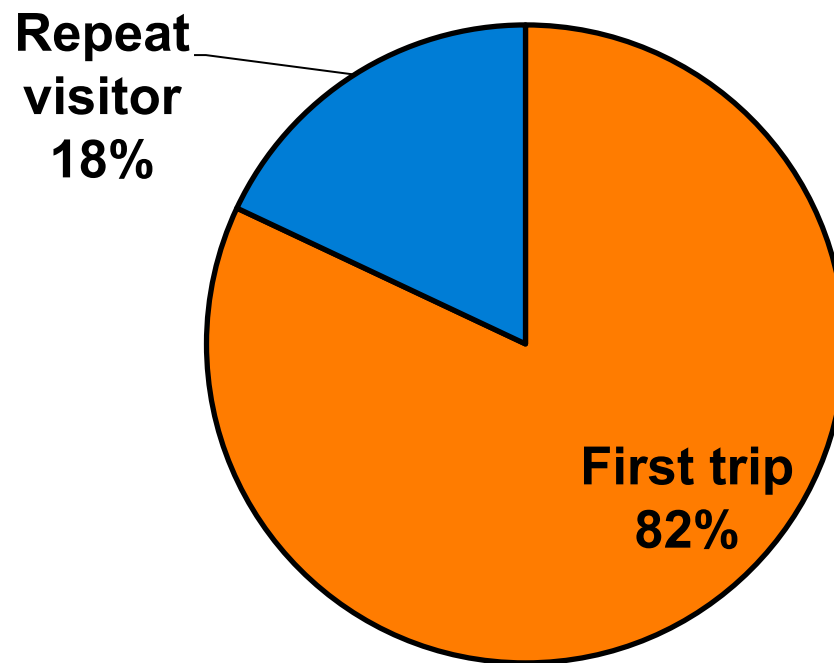
# Number of Children Travel Party

N=34 total respondents traveling with children.

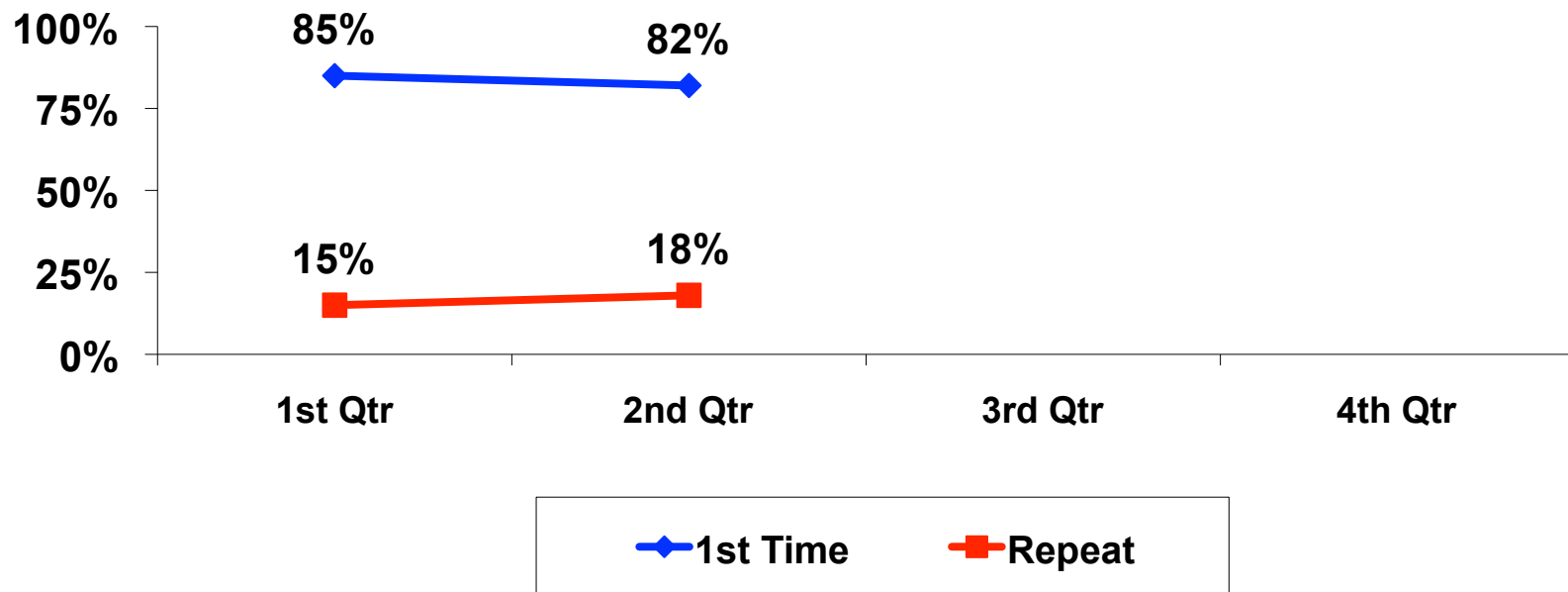
(Of those N=34 respondents, there is a total of 44 children 18 years or younger)



# Prior Trips to Guam



# Prior Trips to Guam



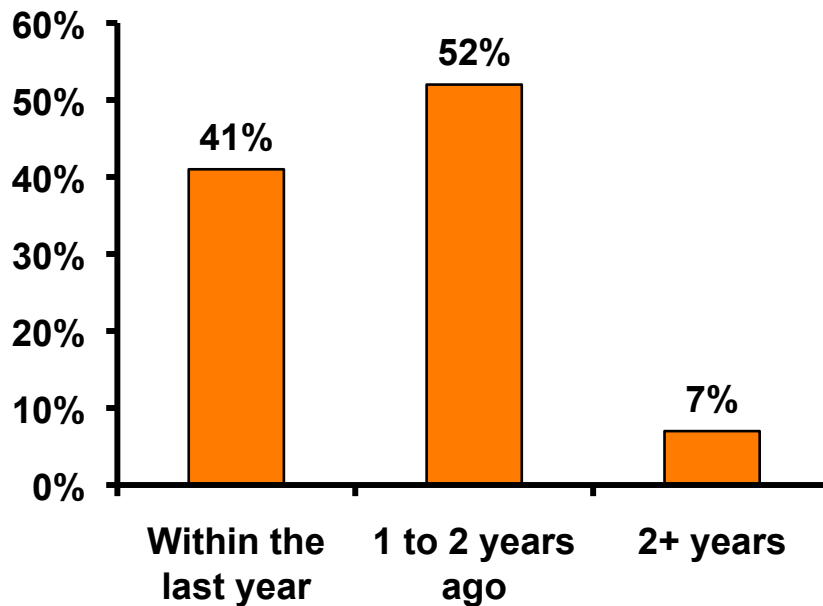
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	76	64	12
		Column N %	50%	52%	44%
	Female	Count	75	60	15
		Column N %	50%	48%	56%
	Total	Count	151	124	27
AGE	18-24	Count	1	1	
		Column N %	1%	1%	
	25-34	Count	32	25	7
		Column N %	21%	20%	26%
	35-49	Count	89	71	18
		Column N %	59%	58%	67%
	50+	Count	28	26	2
		Column N %	19%	21%	7%
	Total	Count	150	123	27



# Repeat Visitors Last Trip

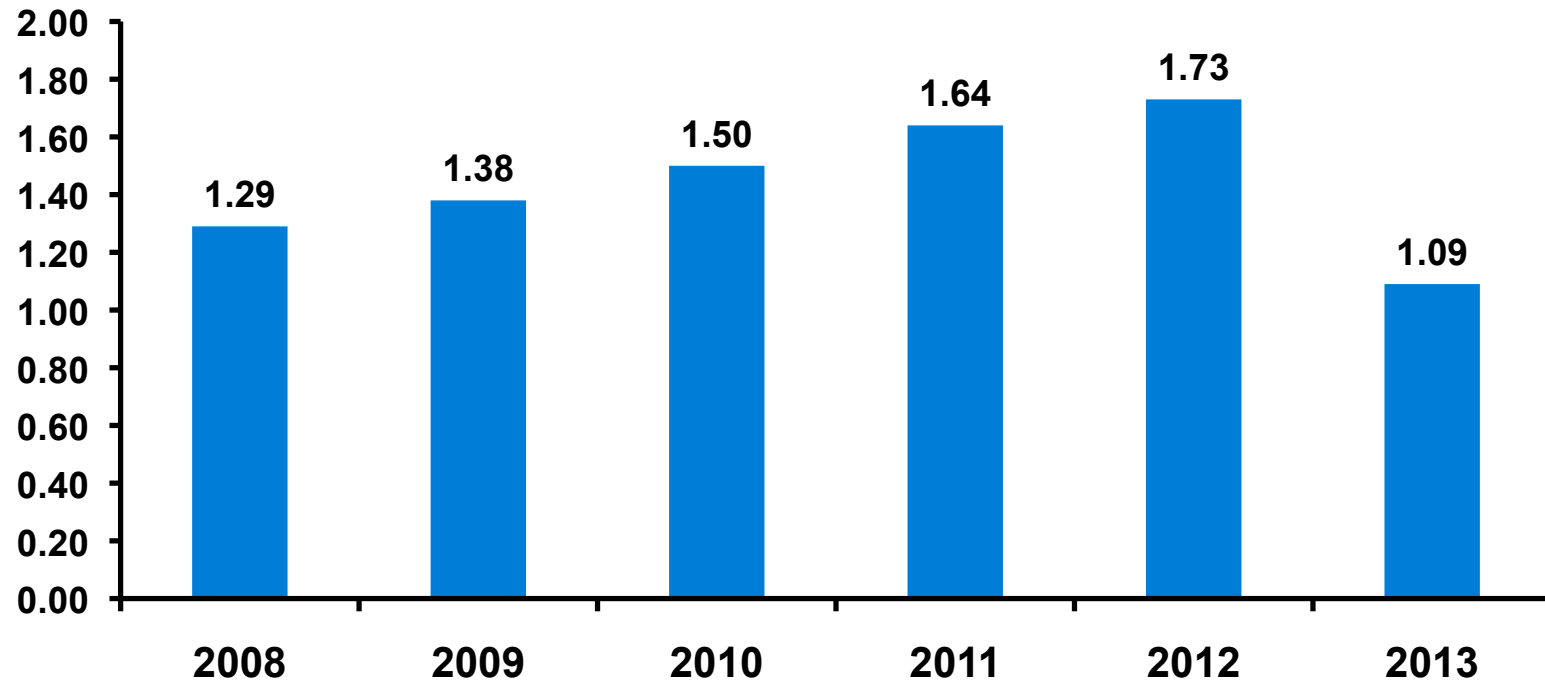
n = 27



- The average repeat visitor has been to Guam 1.07 times.
- A majority of the repeat visitors have been to Guam within the last 2 years.

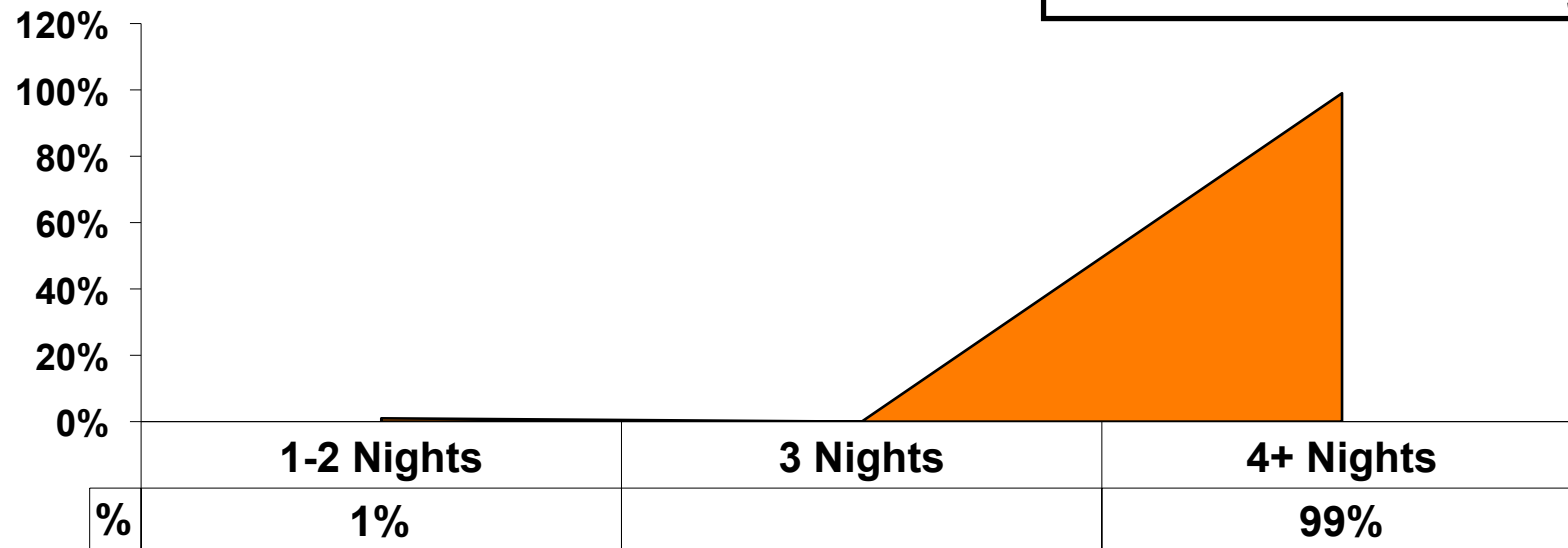
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# Average Number Overnight Trips (2008-2013) (2 nights or more)

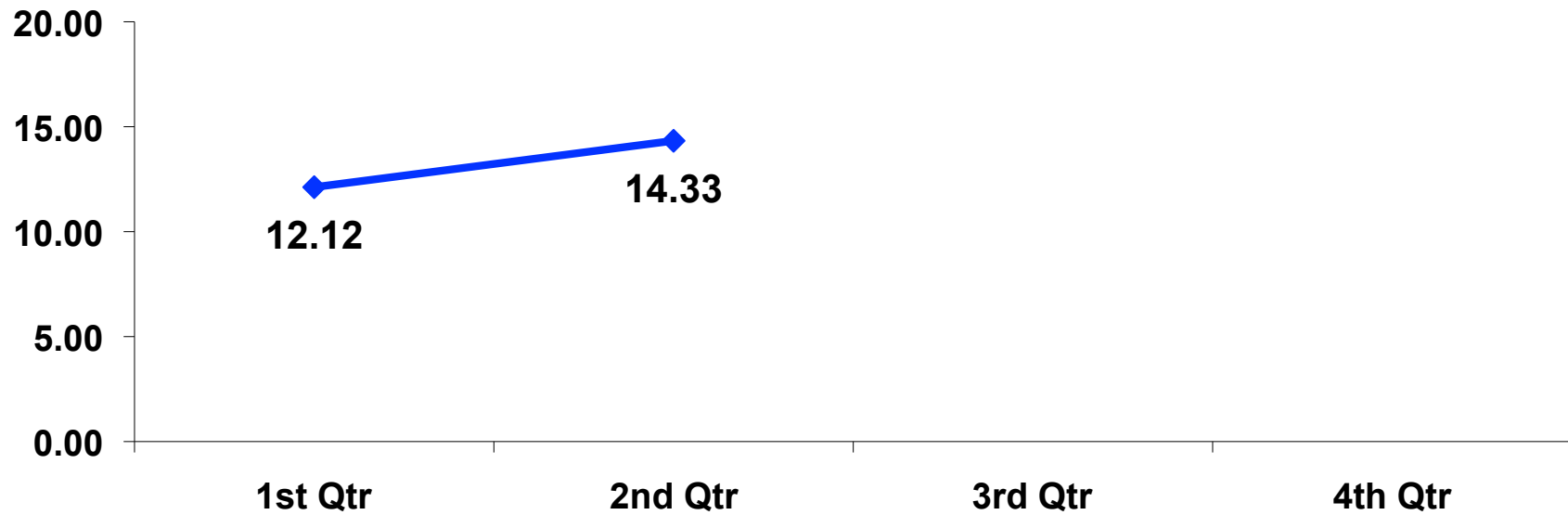


# Length of Stay

Mean = 14.33 Days  
Median = 14.0 Days



# Average Length of Stay

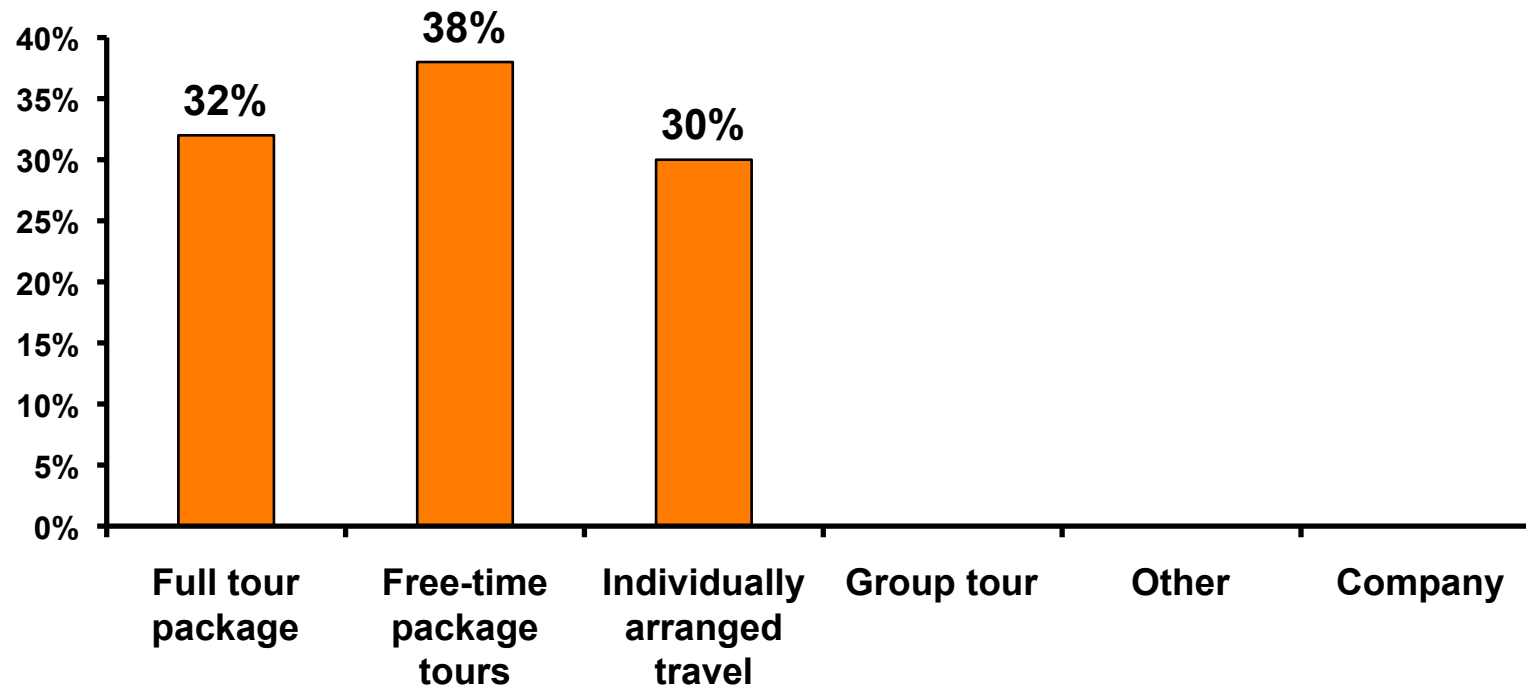


# Occupation by Income

		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	2,563,125-3,661,606	3,661,607+	No Income
Q26	Self-employed	19%	4%	4%	35%	77%	38%	100%		
	Company: Office/ Non-Mgr	17%	20%	23%	10%					
	Professional/ Specialist	14%		26%	5%					
	Company: Manager	11%	12%	12%	20%					
	Homemaker	6%	4%	8%	5%		13%			
	Govt: Office/ Non-Mgr	6%	4%	9%	5%					
	Govt: Executive	5%	8%	4%	10%					
	Company: Exec	5%		3%		23%	25%			
	Company: Engineer	5%	8%	6%						
	Retired	4%	16%	3%						
	Govt: Manager	3%			10%		25%			
	Teacher	2%	8%	1%						
	Company: Salesperson	2%	4%	1%						
	Other	1%	4%						100%	
	Skilled worker	1%	8%							
	Total	Count	151	25	77	20	13	8	3	1

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



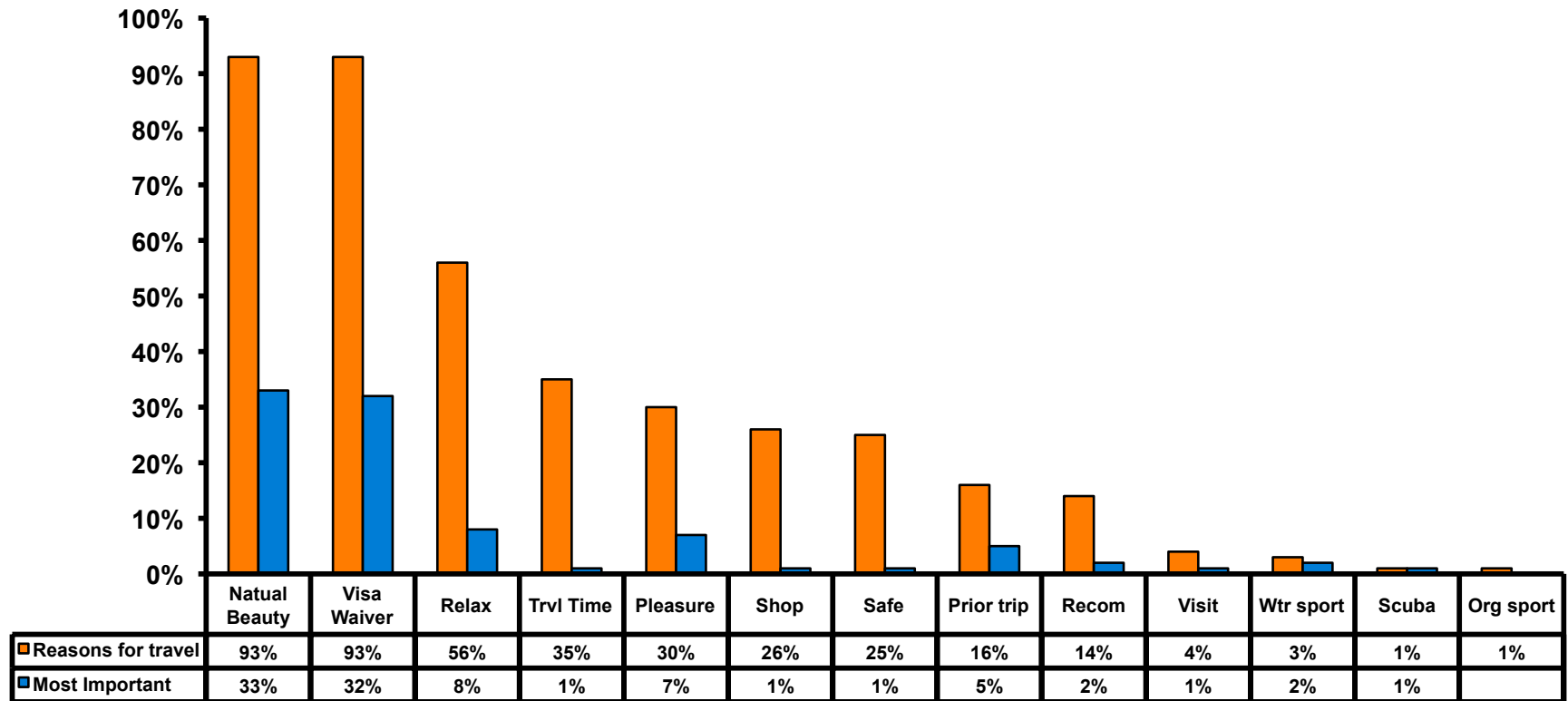
# Accommodation by Income

Average length of stay: 14.33 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	2,263,125-3,661,606	3,661,607+	No Income
Q9	PIC Club	20%	24%	20%	25%	8%	13%			
	Hilton Guam Resort	18%	20%	17%	15%	31%	25%			
	Guam Aurora Resort	13%	16%	8%	15%	15%	25%	33%	100%	
	Westin Resort Guam	9%		8%	10%	23%	25%	33%		
	Hyatt Regency Guam	9%		12%	10%	15%	13%			
	Holiday Resort Guam	8%	12%	11%	5%					
	Fiesta Resort Guam	6%	8%	8%		8%				
	Grand Plaza Hotel	4%	12%	3%	5%					
	Other	3%		3%	5%					
	Guam Marriott Resort	3%	4%	3%						
	Tumon Bay Capital Hotel	1%	4%		5%					
	Outrigger Guam Resort	1%		3%						
	Apartment	1%		1%						
	Onward Beach Resort	1%						33%		
	Sheraton Laguna Guam	1%			5%					
	Pacific Bay Hotel	1%		1%						
	Guam Plaza Hotel	1%		1%						
	Oceanview Hotel	1%		1%						
	Bayview Hotel	1%		1%						
	Total	Count	150	25	76	20	13	8	3	1



# Travel Motivation - Top Responses



# Most Important Reason for Choosing Guam

- Visa waiver
- Guam's natural beauty/ beaches
- To relax

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	93%	100%	91%	93%	96%	92%	95%
	No Visa required	93%	100%	94%	93%	93%	92%	95%
	Relax	56%		50%	58%	57%	58%	55%
	Short travel time	35%		41%	36%	25%	26%	44%
	Pleasure	30%		22%	33%	32%	28%	32%
	Shopping	26%		25%	27%	25%	22%	31%
	Safe	25%		25%	21%	36%	29%	20%
	Previous trip	16%		19%	18%	7%	14%	17%
	Recomm- friend/family/trvl agnt	14%		13%	9%	29%	13%	15%
	Other	5%		6%	6%	4%	8%	3%
	Visit friends/ Relatives	4%		9%	1%	7%	3%	5%
	Water sports	3%		6%	3%		3%	4%
	Scuba	1%			2%		1%	1%
	Organized sports	1%				4%	1%	
	Married/ Attn wedding	1%			1%		1%	
	Company Sponsored	1%				4%	1%	
	Company/ Business Trip	1%			1%			1%
	Price	1%				4%	1%	
	Total	Count	1	32	89	28	76	75

# 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	2,563,125-3,661,606	3,661,607+	No Income
Q5A	Natural beauty	93%	96%	95%	100%	92%	75%	67%	100%	
	No Visa required	93%	96%	94%	95%	100%	75%	100%	100%	
	Relax	56%	56%	57%	65%	54%	63%	33%		
	Short travel time	35%	24%	38%	45%	31%	50%	33%		
	Pleasure	30%	24%	31%	20%	38%	38%	33%	100%	
	Shopping	26%	24%	29%	40%	15%	25%			
	Safe	25%	32%	19%	35%	23%	38%			
	Previous trip	16%	8%	19%	15%	15%	13%			
	Recomm- friend/family/trvl agnt	14%	20%	12%	15%	23%		33%		
	Other	5%	4%	3%	15%					
	Visit friends/ Relatives	4%	8%	1%	5%	8%	13%			
	Water sports	3%	4%	4%	5%					
	Scuba	1%		3%						
	Organized sports	1%	4%							
	Married/ Attn wedding	1%		1%						
	Company Sponsored	1%	4%							
	Company/ Business Trip	1%			5%					
	Price	1%	4%							
	Total	Count	151	25	77	20	13	8	3	1

# SECTION 3 **EXPENDITURES**

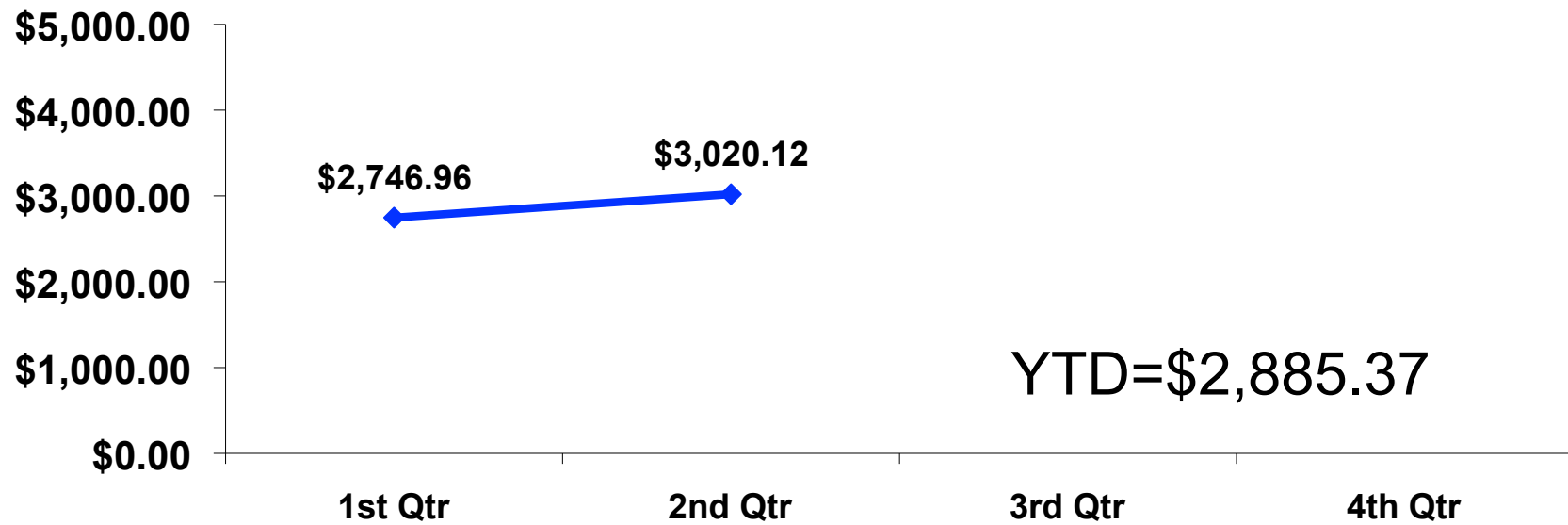
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# Prepaid Expenditures

Ruble 30.32 /US\$1

- \$6,311.59 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$11,873 = maximum (highest amount recorded for the entire sample)
- \$3,020.12 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person



# Breakdown of Prepaid Expenditures

## Ruble 30.32 = \$1

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

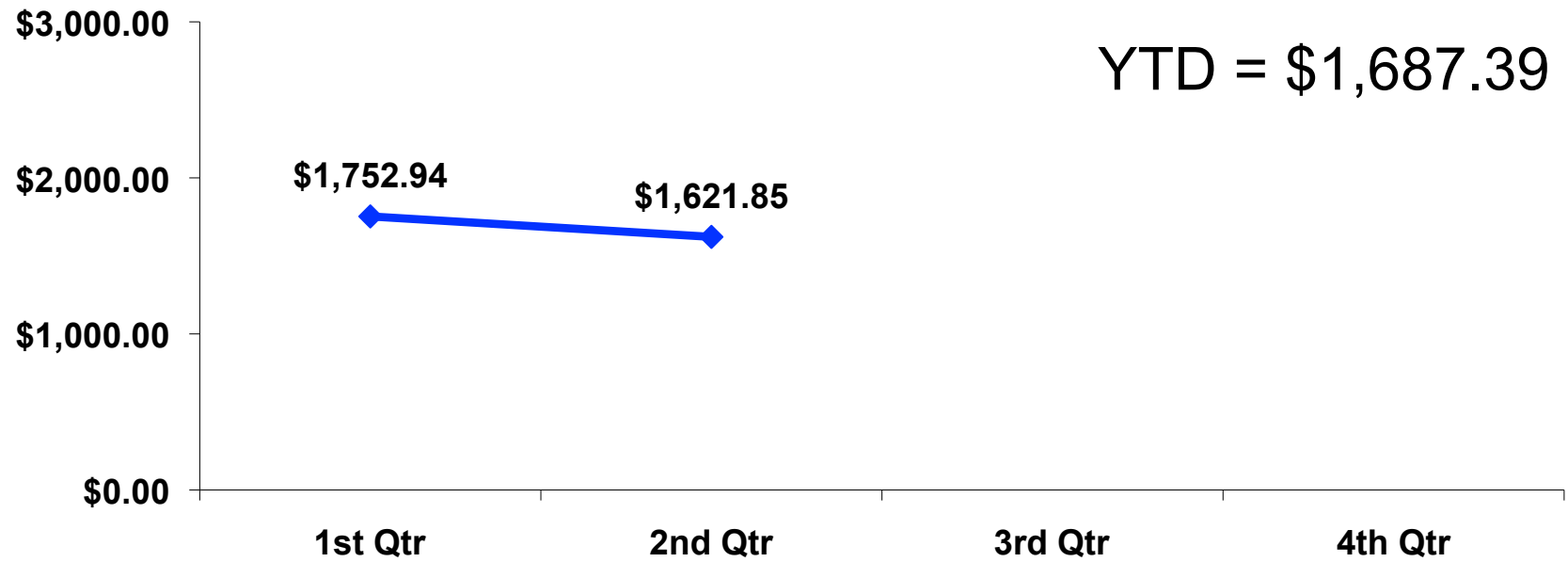
	MEAN \$
Air & Accommodation package only	\$5,885.42
Air & Accommodation w/ daily meal package	\$7,839.98
Air only	\$1,666.84
Accommodation only	\$1,818.70
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation- Russia	\$-
Ground transportation- Guam	\$-
Optional tours/ activities	\$-
Other expenses	\$-
<b>Total Prepaid</b>	<b>\$6,311.59</b>



# On-Island Expenditures

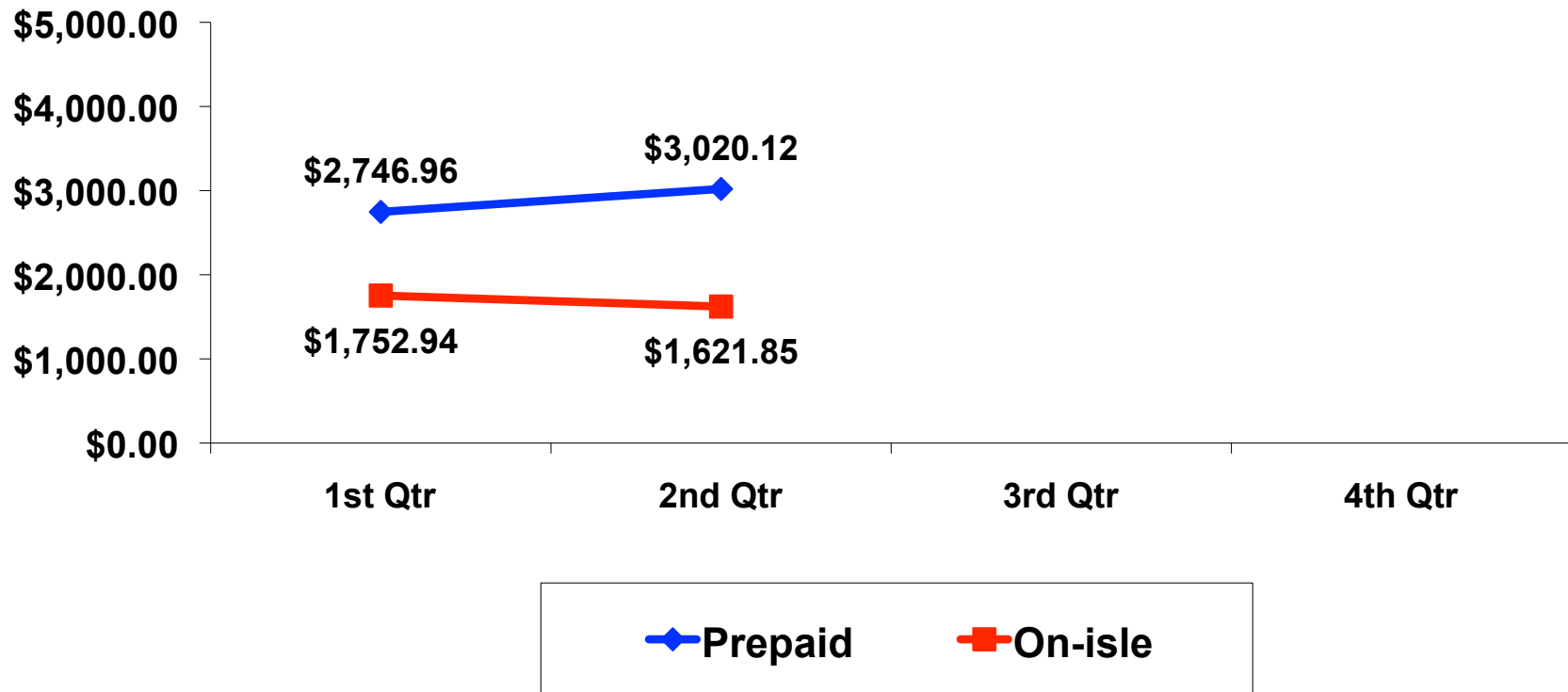
- \$3,390.89 = overall mean average on-island expense (for entire travel party size) by respondent
- \$500 = Minimum (lowest amount recorded for the entire sample)
- \$8,400 = Maximum (highest amount recorded for the entire sample)
- \$1,621.85 = overall mean average per person on-island expenditure

# On-Island Expenditures Per Person



# Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$2,885.37      On-Island YTD = \$1,687.39



# 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	\$1,621.85	\$1,642.66	\$1,601.32	.	\$1,563.12	\$1,692.14	\$1,629.61	\$2,535.00	\$1,403.46	\$1,672.52	\$1,551.39
	Median	\$1,500	\$1,522	\$1,500	.	\$1,405	\$1,580	\$1,568	\$2,535	\$1,333	\$1,488	\$1,555
	Minimum	\$217	\$217	\$500	.	\$767	\$217	\$990	\$2,535	\$500	\$625	\$738
	Maximum	\$6,000	\$3,800	\$6,000	.	\$3,000	\$3,800	\$2,750	\$2,535	\$2,775	\$6,000	\$2,500

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$292.91	\$310.13	\$275.47	\$200.00	\$190.00	\$318.99	\$341.43
	Median	\$250	\$300	\$200	\$200	\$50	\$300	\$225
F&B FF/STORE	Mean	\$43.07	\$14.47	\$72.43	\$0.00	\$87.81	\$35.80	\$17.86
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$671.42	\$698.55	\$643.93	\$600.00	\$829.53	\$604.94	\$701.79
	Median	\$580	\$600	\$500	\$600	\$690	\$500	\$600
OPT TOUR	Mean	\$423.25	\$506.84	\$338.53	\$600.00	\$275.31	\$435.17	\$552.50
	Median	\$300	\$355	\$250	\$600	\$300	\$300	\$400
GIFT- SELF	Mean	\$1,060.46	\$1,098.03	\$1,022.40	\$1,000.00	\$890.94	\$1,167.08	\$930.36
	Median	\$1,000	\$1,000	\$1,000	\$1,000	\$975	\$1,000	\$900
GIFT- OTHER	Mean	\$553.05	\$534.74	\$571.60	\$0.00	\$598.13	\$571.80	\$470.71
	Median	\$400	\$400	\$400	\$0	\$500	\$360	\$400
TRANS	Mean	\$222.85	\$248.29	\$197.07	\$135.00	\$191.56	\$237.81	\$218.57
	Median	\$160	\$200	\$130	\$135	\$120	\$180	\$185
OTHER	Mean	\$163.18	\$172.50	\$153.73	\$0.00	\$358.59	\$105.11	\$130.71
	Median	\$100	\$100	\$100	\$0	\$110	\$100	\$105
TOTAL	Mean	\$3,390.89	\$3,593.03	\$3,186.07	\$2,535.00	\$3,409.38	\$3,416.85	\$3,356.79
	Median	\$3,090	\$3,295	\$3,000	\$2,535	\$2,850	\$3,110	\$3,300

# On-Island Expenditures

## First Timers & Repeaters

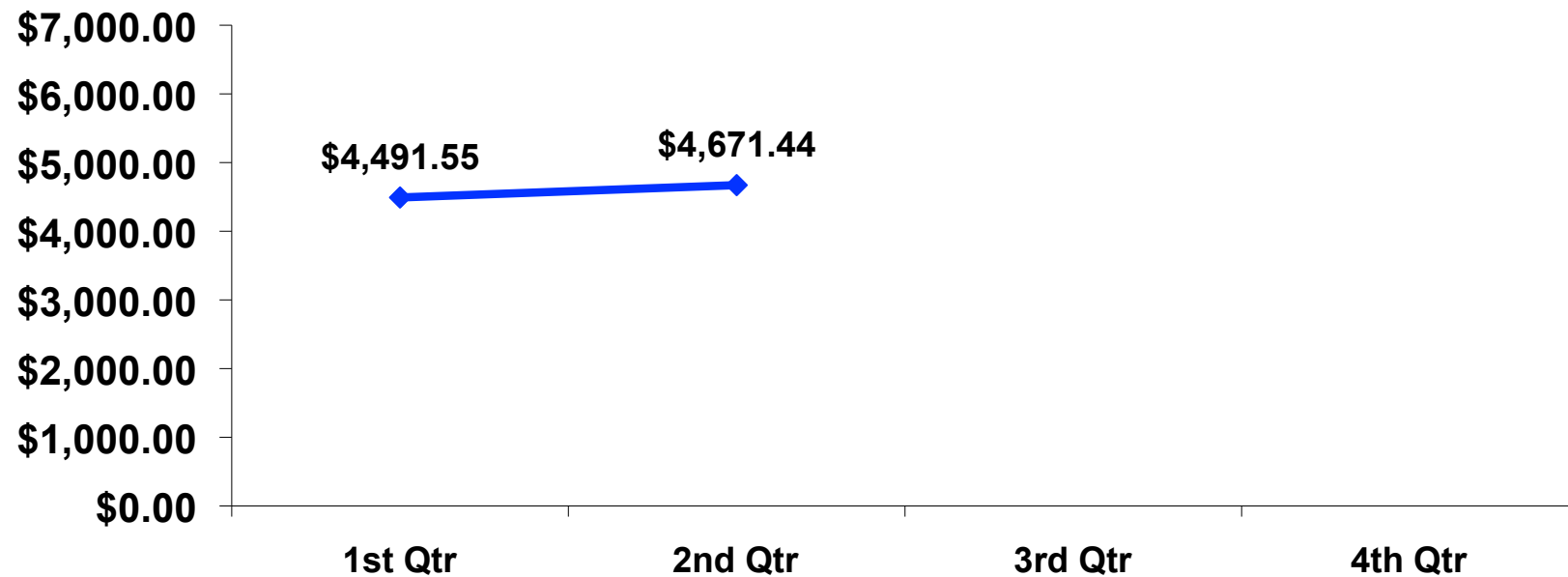
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$292.91	\$303.47	\$244.44
	Median	\$250	\$270	\$200
F&B FF/STORE	Mean	\$43.07	\$42.02	\$48.08
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$671.42	\$659.56	\$725.93
	Median	\$580	\$600	\$500
OPT TOUR	Mean	\$423.25	\$436.13	\$364.07
	Median	\$300	\$300	\$300
GIFT- SELF	Mean	\$1,060.46	\$1,047.58	\$1,119.63
	Median	\$1,000	\$1,000	\$1,000
GIFT- OTHER	Mean	\$553.05	\$531.37	\$652.59
	Median	\$400	\$360	\$500
TRANS	Mean	\$222.85	\$235.12	\$166.48
	Median	\$160	\$180	\$150
OTHER	Mean	\$163.18	\$154.84	\$201.48
	Median	\$100	\$100	\$150
TOTAL	Mean	\$3,390.89	\$3,341.61	\$3,617.22
	Median	\$3,090	\$3,065	\$3,250

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

- \$4,671.44 = overall average
- \$1,072 = Minimum (lowest amount recorded for the entire sample)
- \$12,596 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures Per Person

YTD=\$4,582.10





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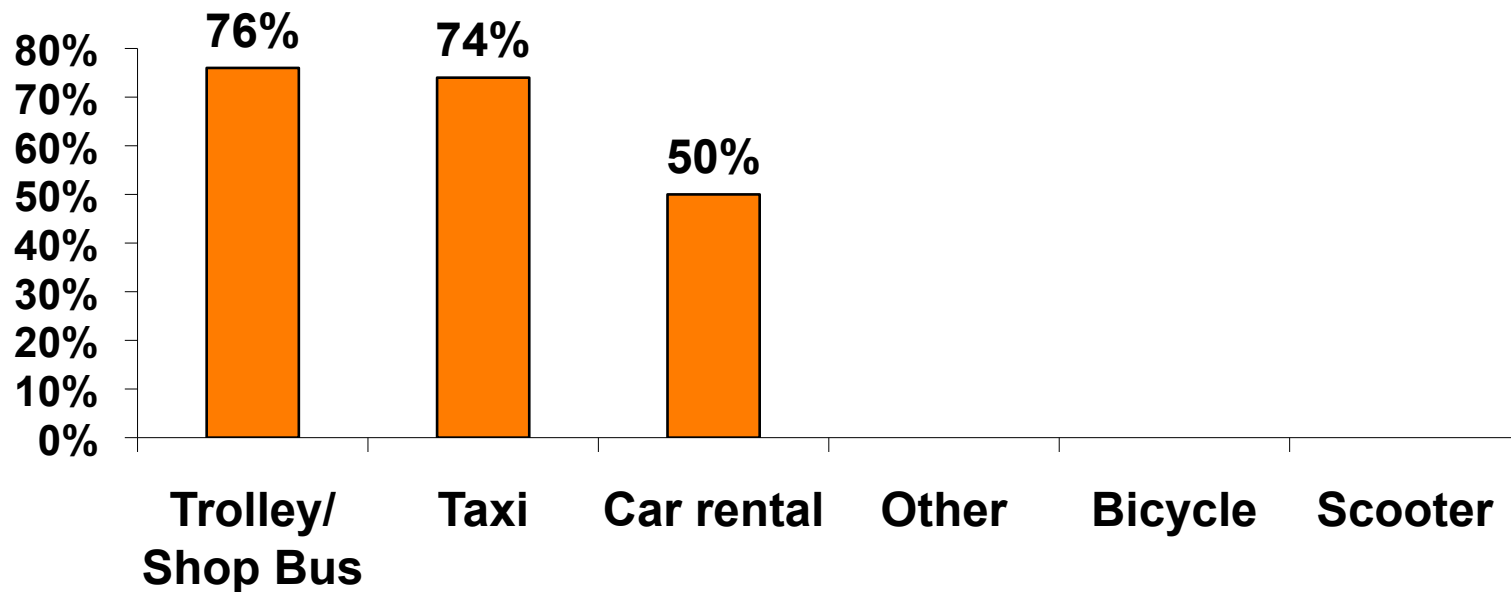
# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$292.91
Food & beverage in fast food restaurant/ convenience store	\$43.07
Food & beverage at restaurants or drinking establishments outside a hotel	\$671.42
Optional tours and activities	\$423.25
Gifts/ souvenirs for yourself/companions	\$1,060.46
Gifts/ souvenirs for friends/family at home	\$553.05
Local transportation	\$222.85
Other expenses not covered	\$163.18
<b>Average Total</b>	<b>\$3,390.89</b>

# Local Transportation

n=147

Mean=\$222.85 per travel party

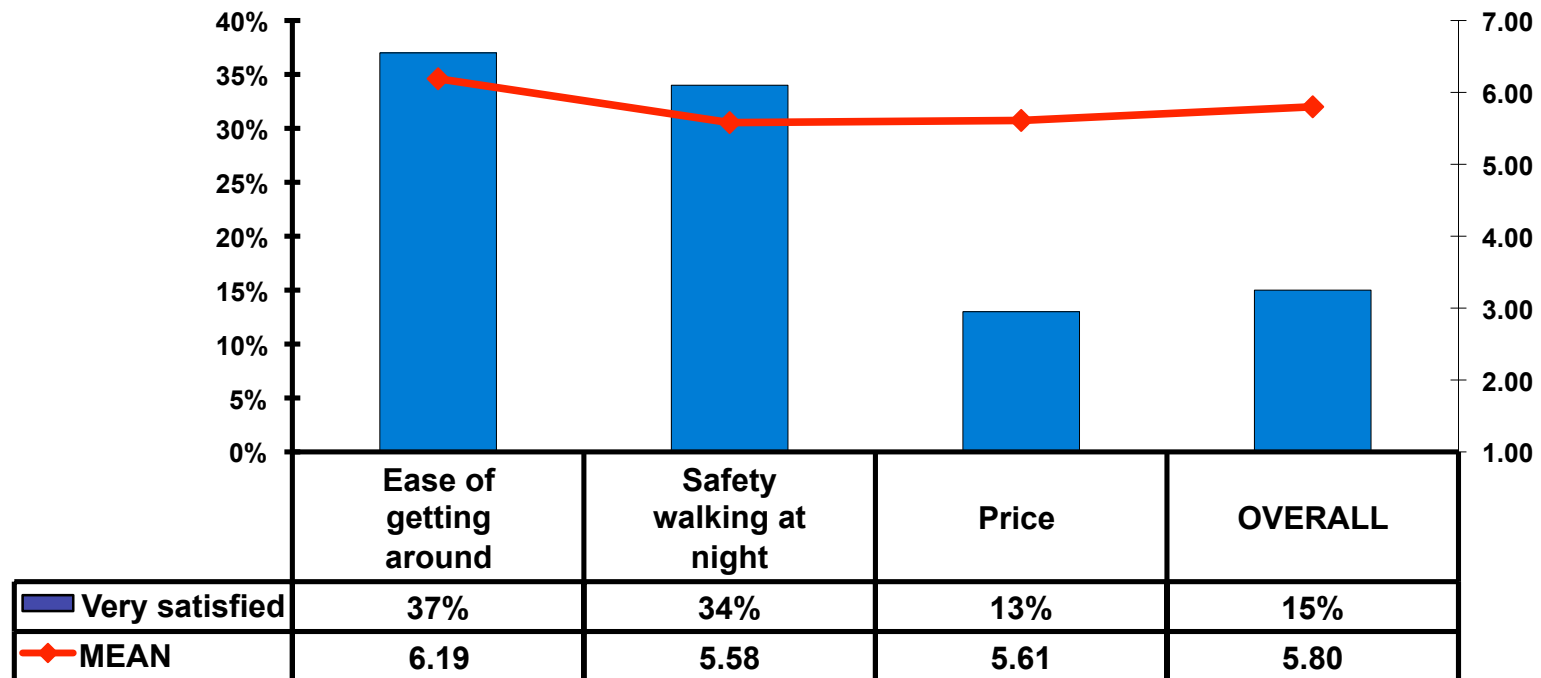


# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

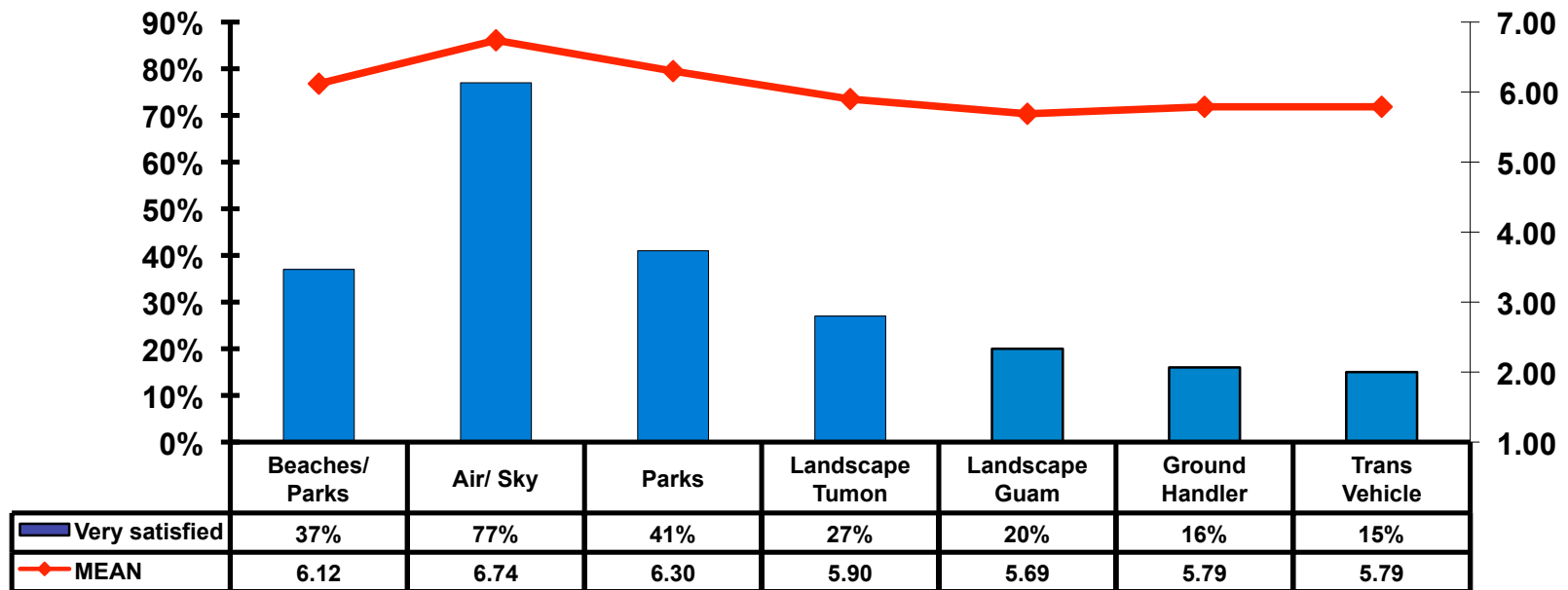
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

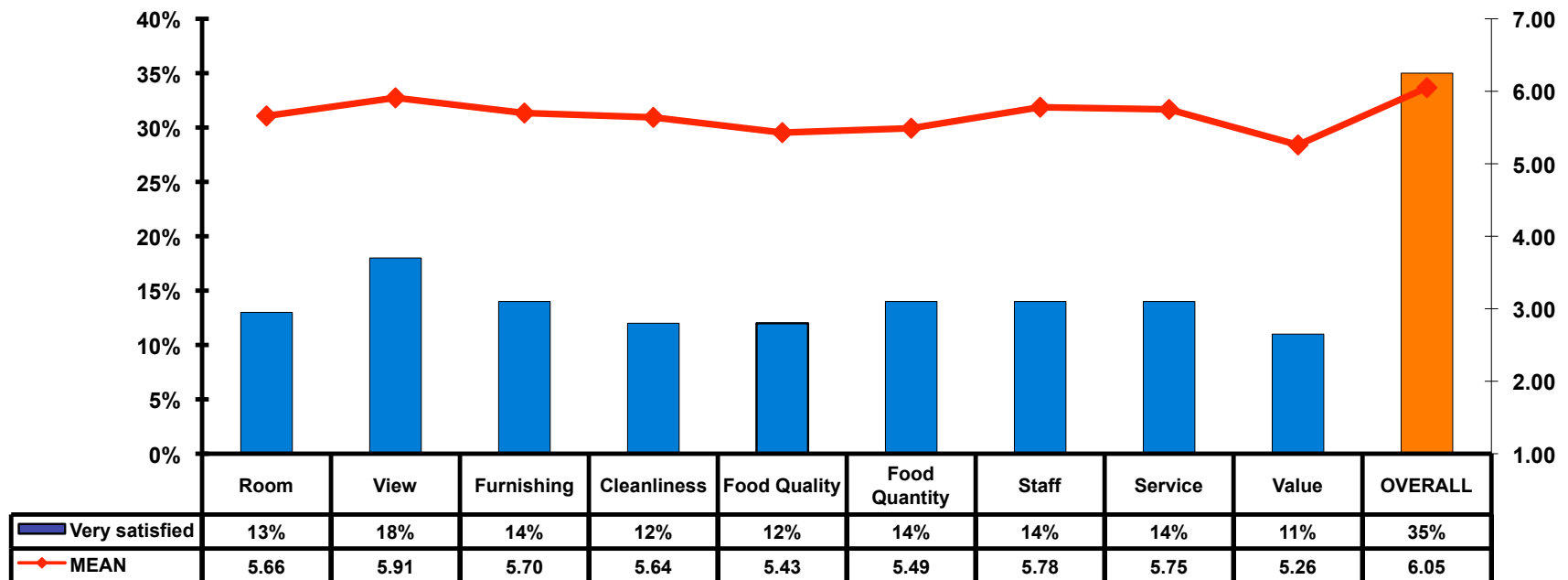
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

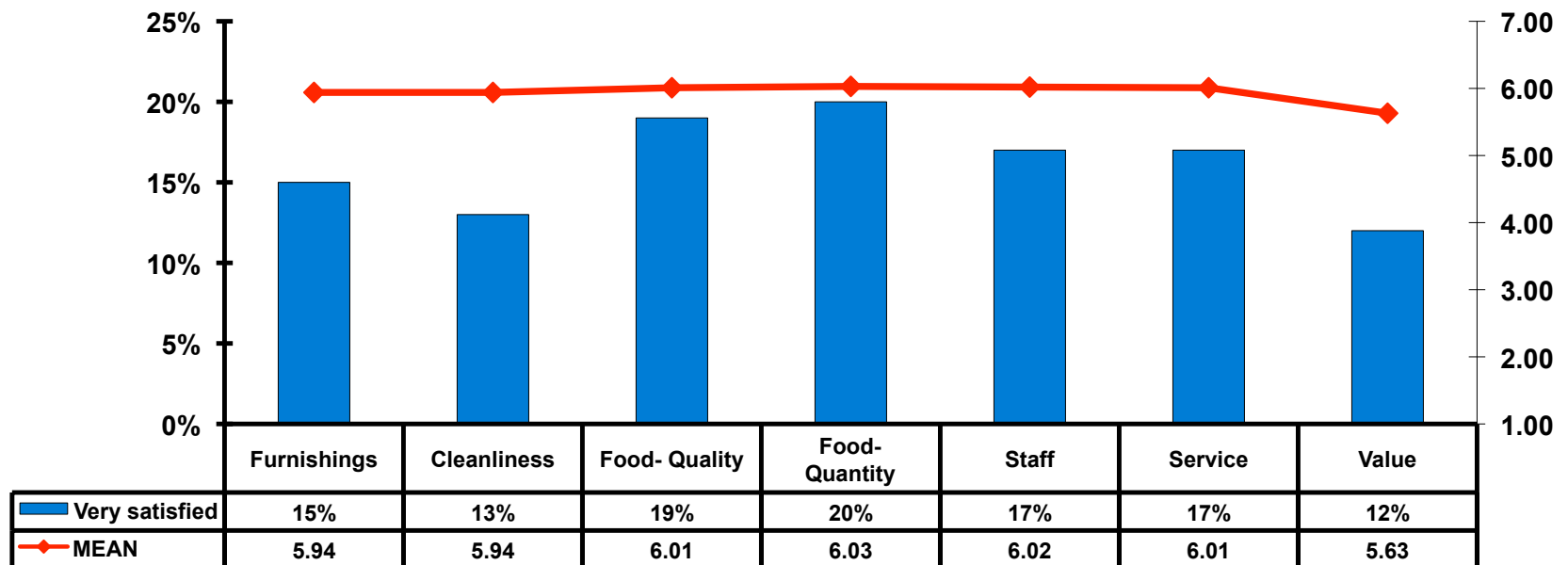
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

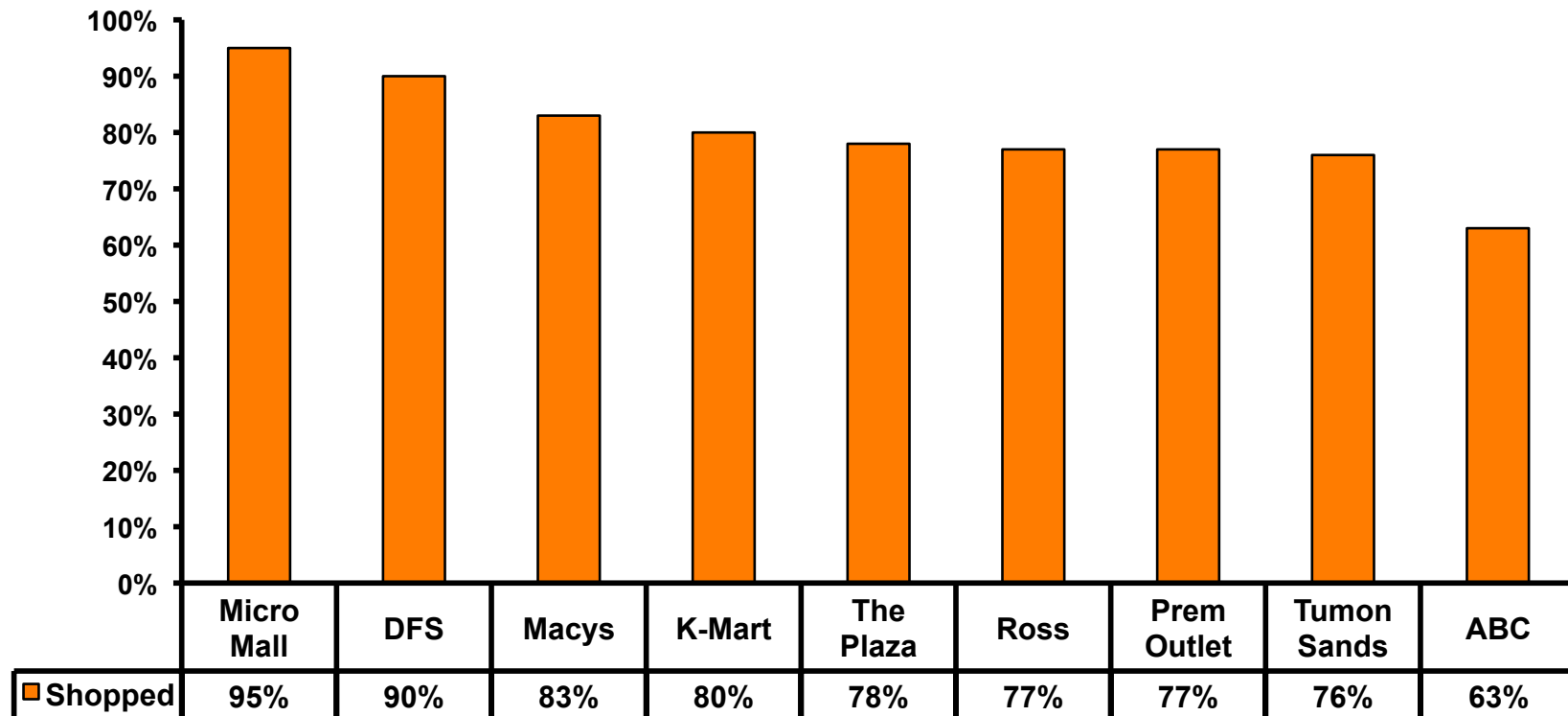
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses





# Satisfaction with Shopping

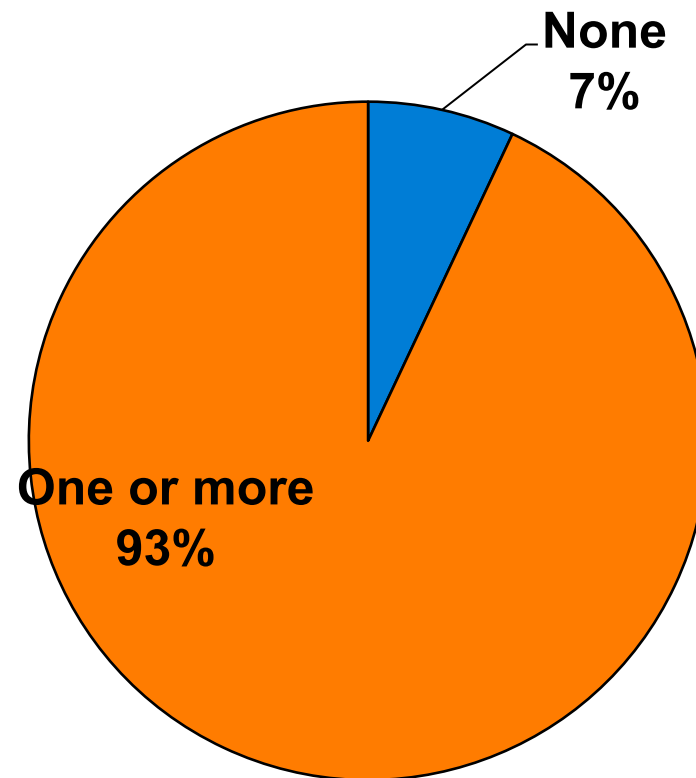
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

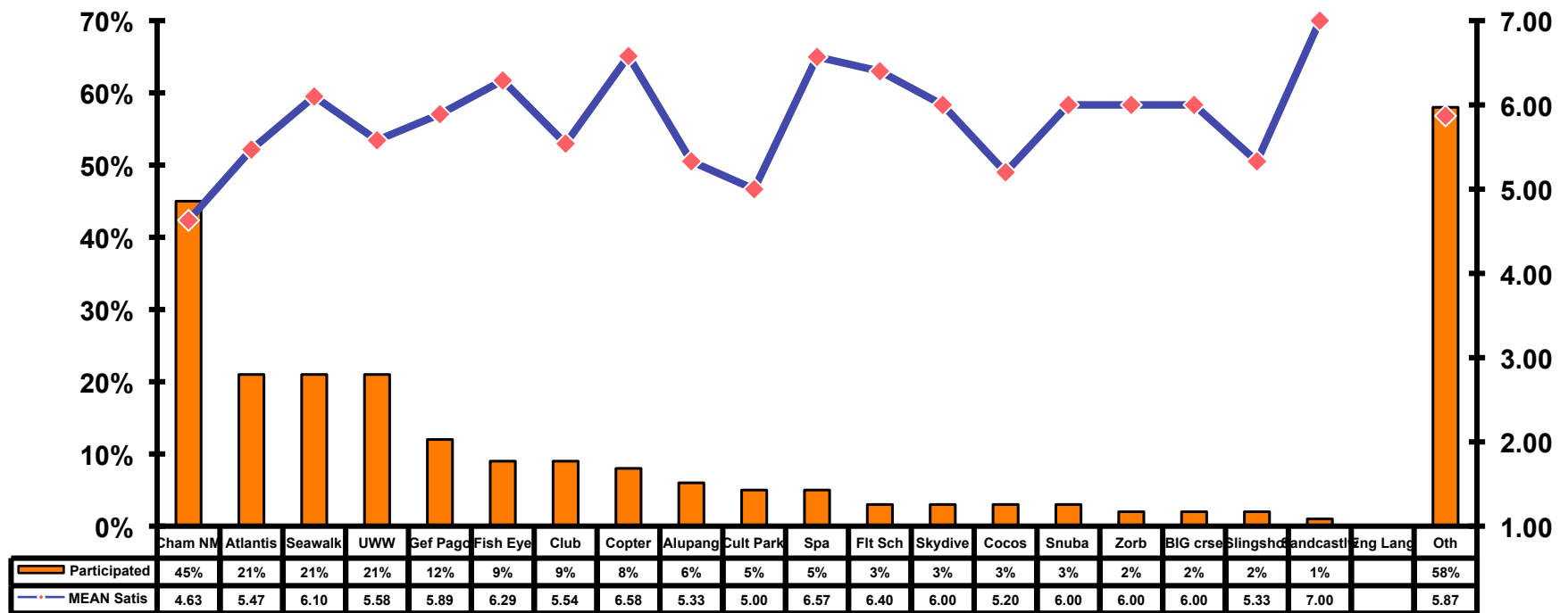
<b>Quality of Shopping</b>	<b>Variety of Shopping</b>
Score of 6 to 7 = <b>57%</b>	Score of 6 to 7 = <b>54%</b>
Score of 4 to 5 = <b>41%</b>	Score of 4 to 5 = <b>44%</b>
Score 1 to 3 = <b>2%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 5.61</b>	<b>MEAN = 5.57</b>

# Optional Tour Participation

- Average number of tours participated in is 2.85



# 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>67%</b>	Score of 6 to 7 = <b>41%</b>
Score of 4 to 5 = <b>32%</b>	Score of 4 to 5 = <b>43%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>17%</b>
<b>MEAN = 5.86</b>	<b>MEAN = 5.01</b>

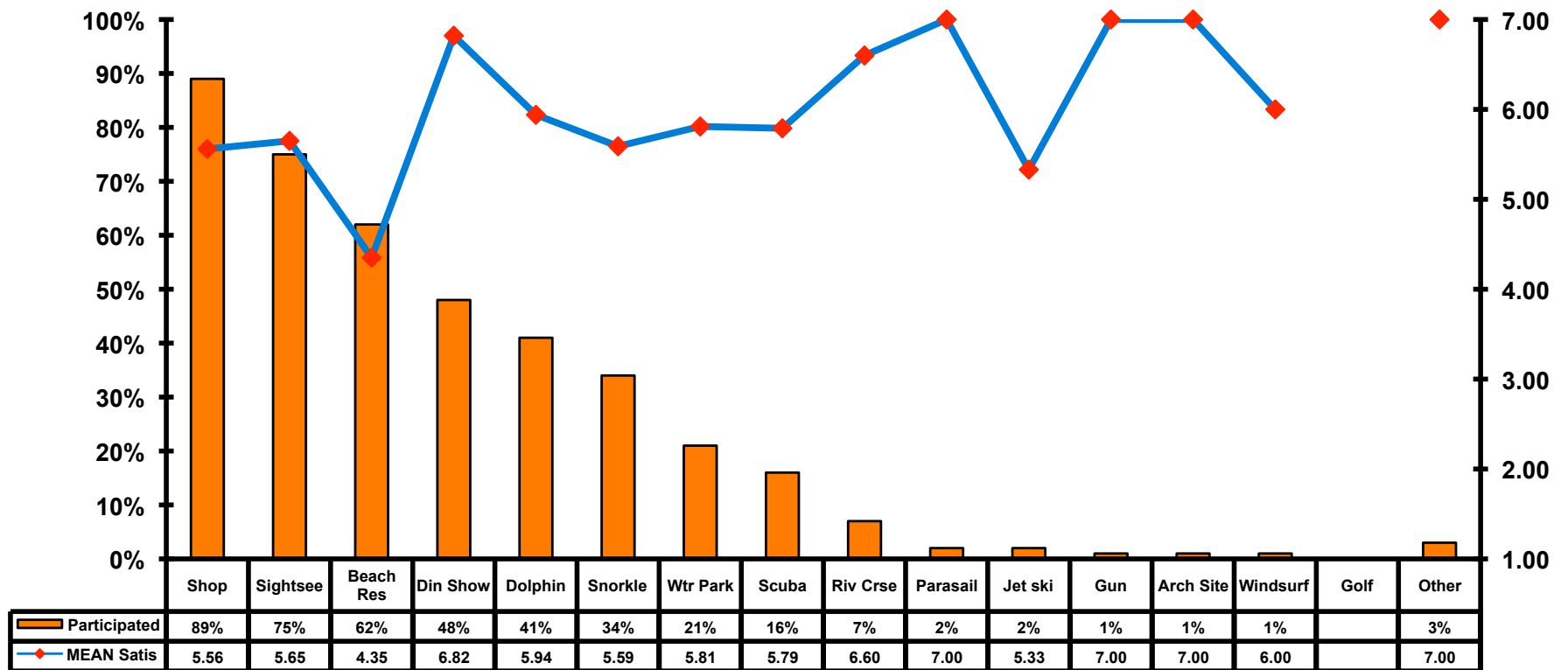
# Night Tours Satisfaction

7pt Rating Scale

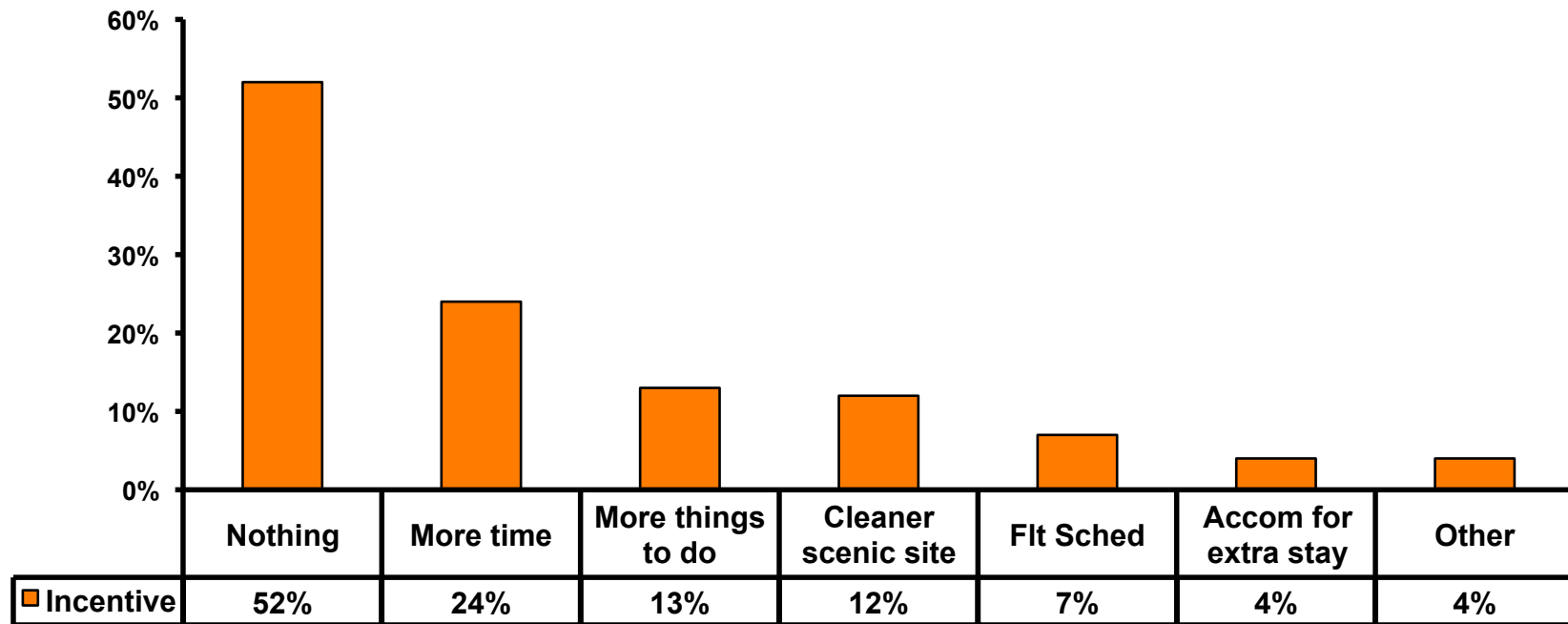
7=Very Satisfied/ 1=Very Dissatisfied

<b>Quality of Night Tour</b>	<b>Variety of Night Tour</b>
Score of 6 to 7 = <b>37%</b>	Score of 6 to 7 = <b>32%</b>
Score of 4 to 5 = <b>55%</b>	Score of 4 to 5 = <b>52%</b>
Score 1 to 3 = <b>8%</b>	Score 1 to 3 = <b>16%</b>
<b>MEAN = 4.96</b>	<b>MEAN = 4.71</b>

# Satisfaction with Other Activities



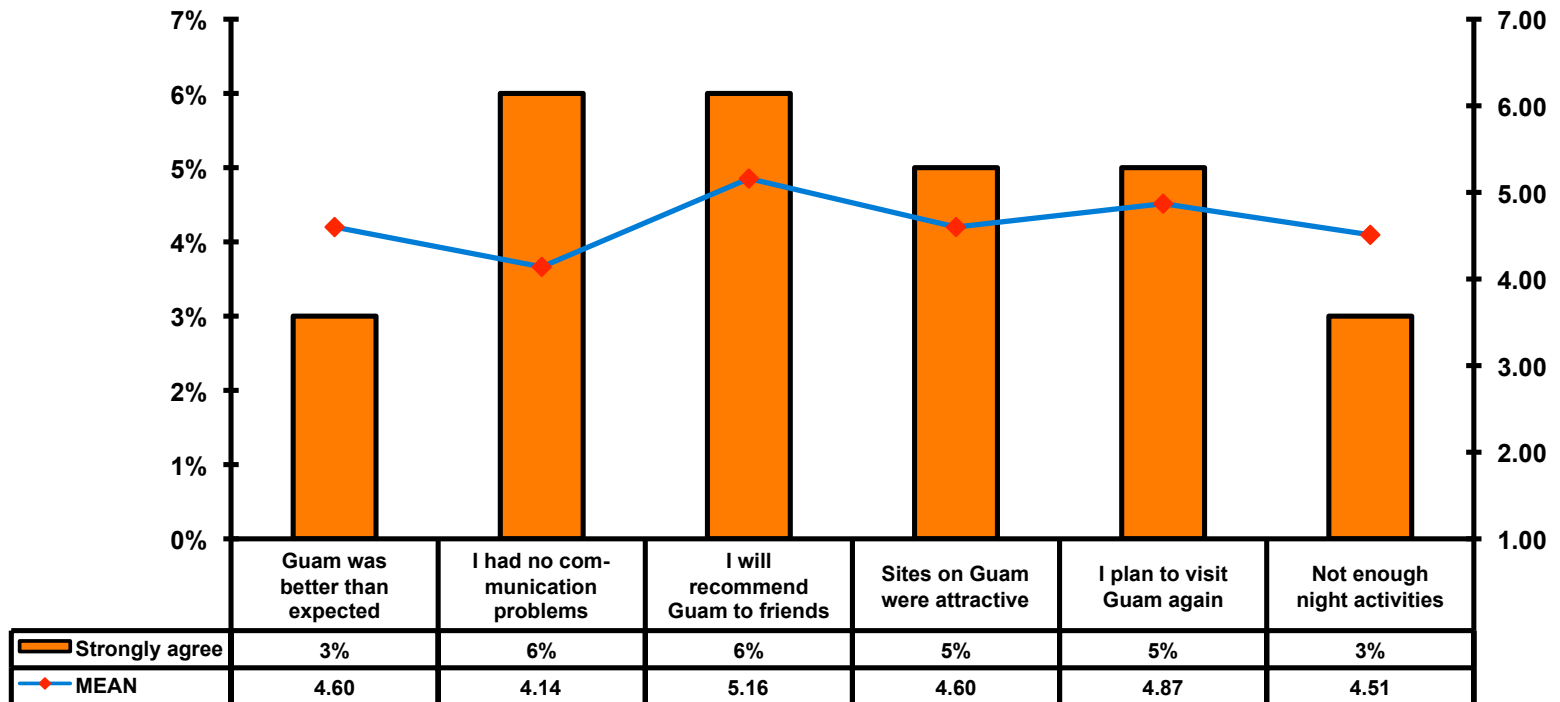
# What would it take to make Guam more enjoyable for families?



# On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

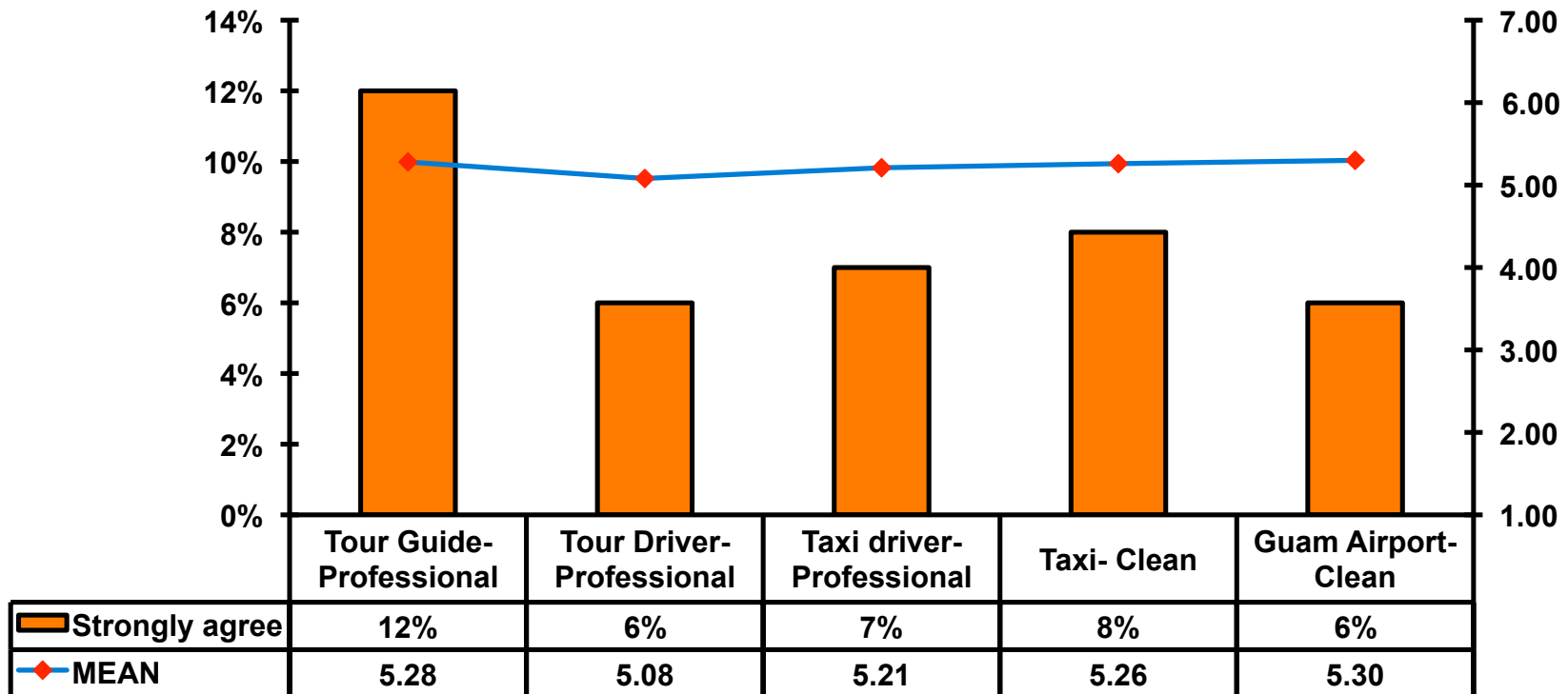




# Transportation

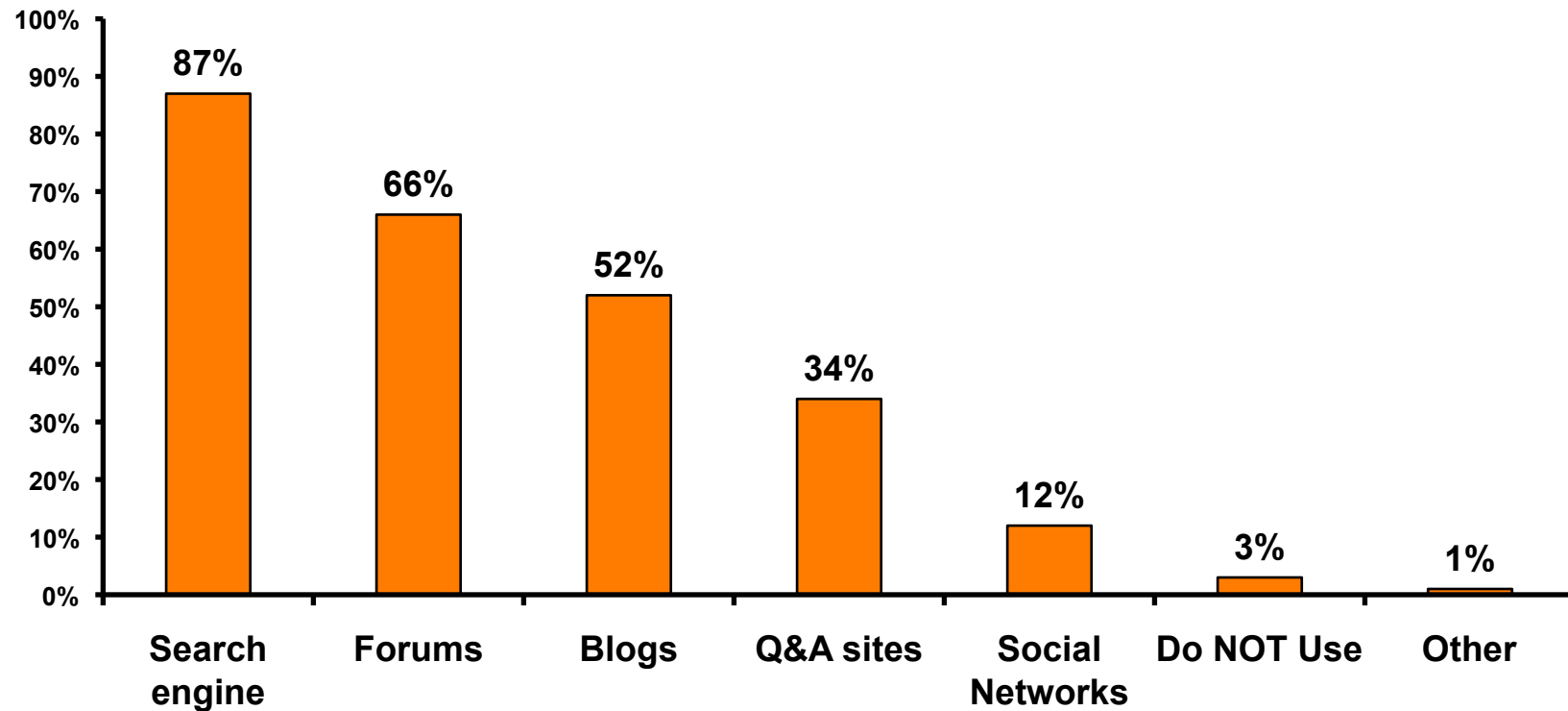
7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



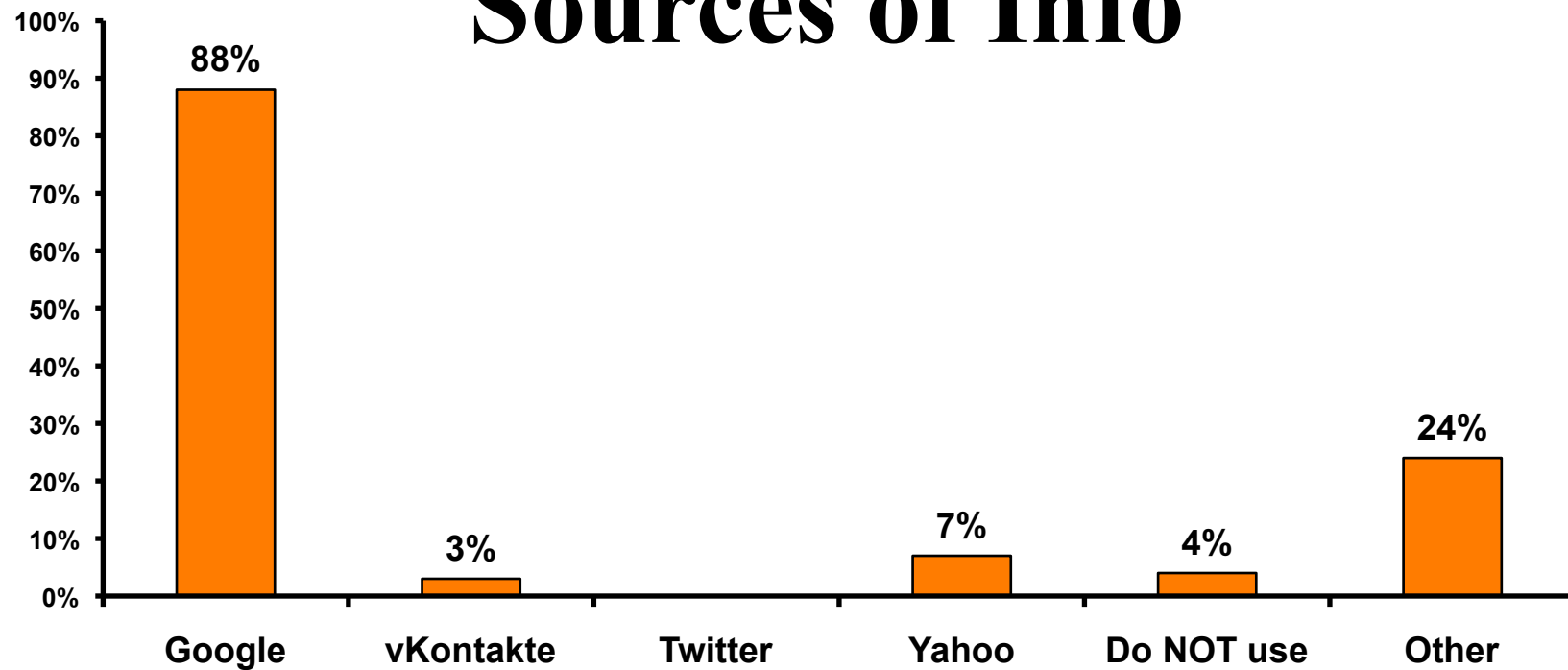
# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info

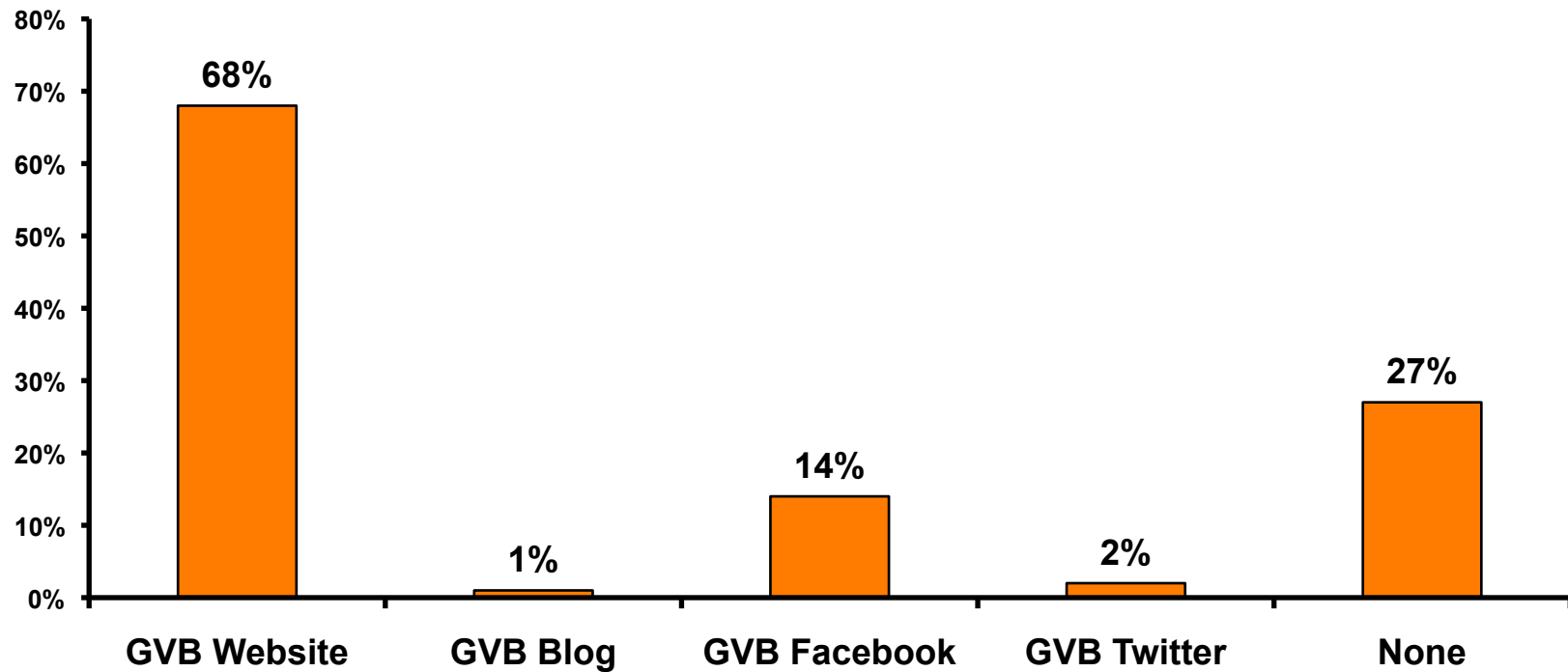


# Internet- Things To Do

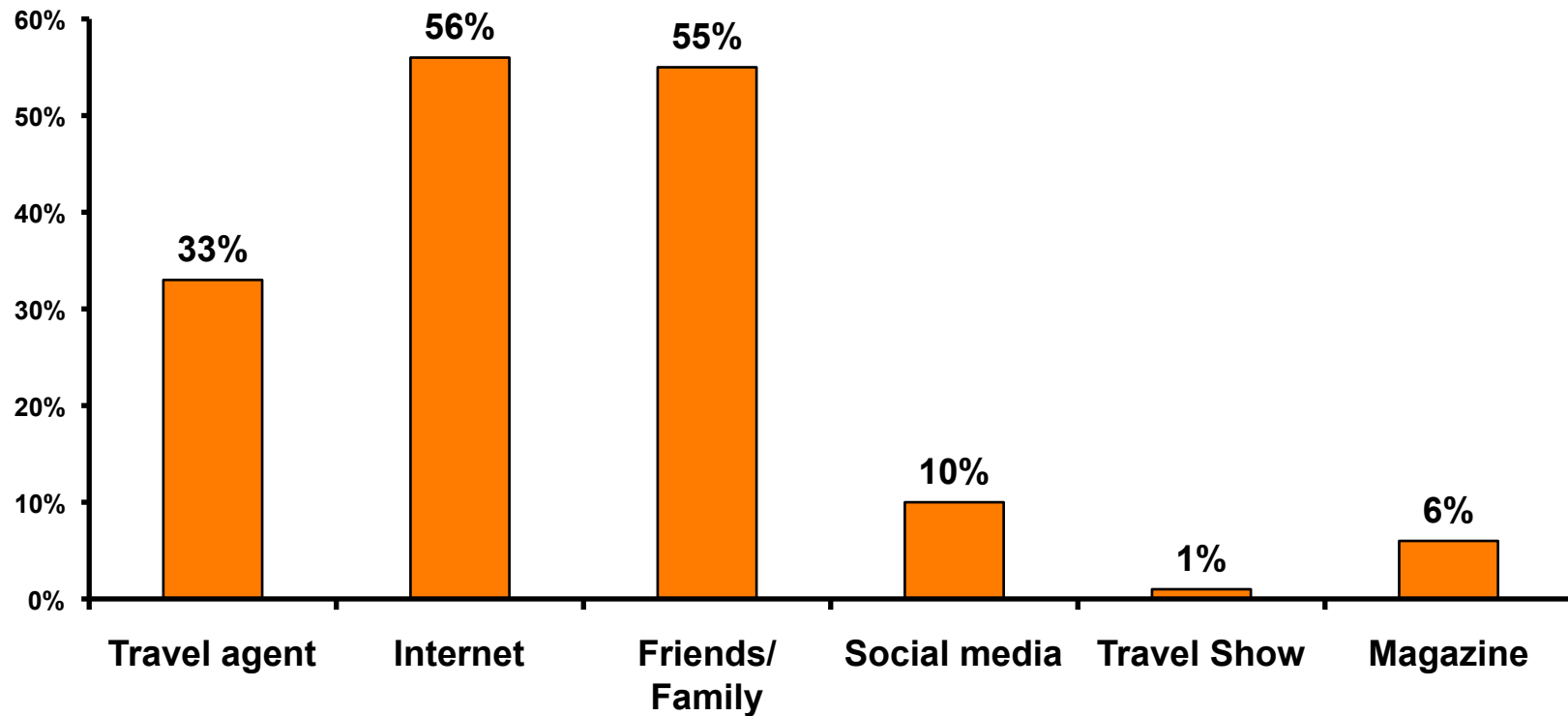
## Sources of Info



# Internet- GVB Sources

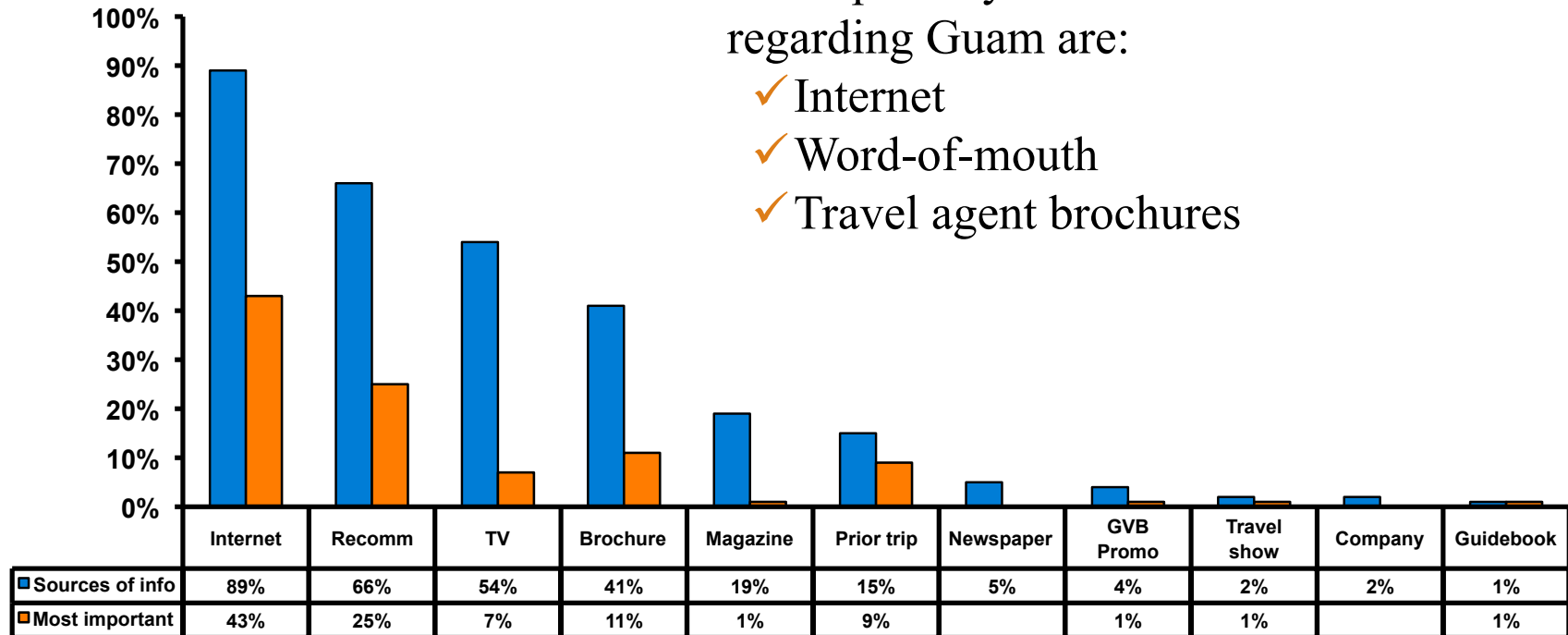


# Travel Motivation- Info Sources



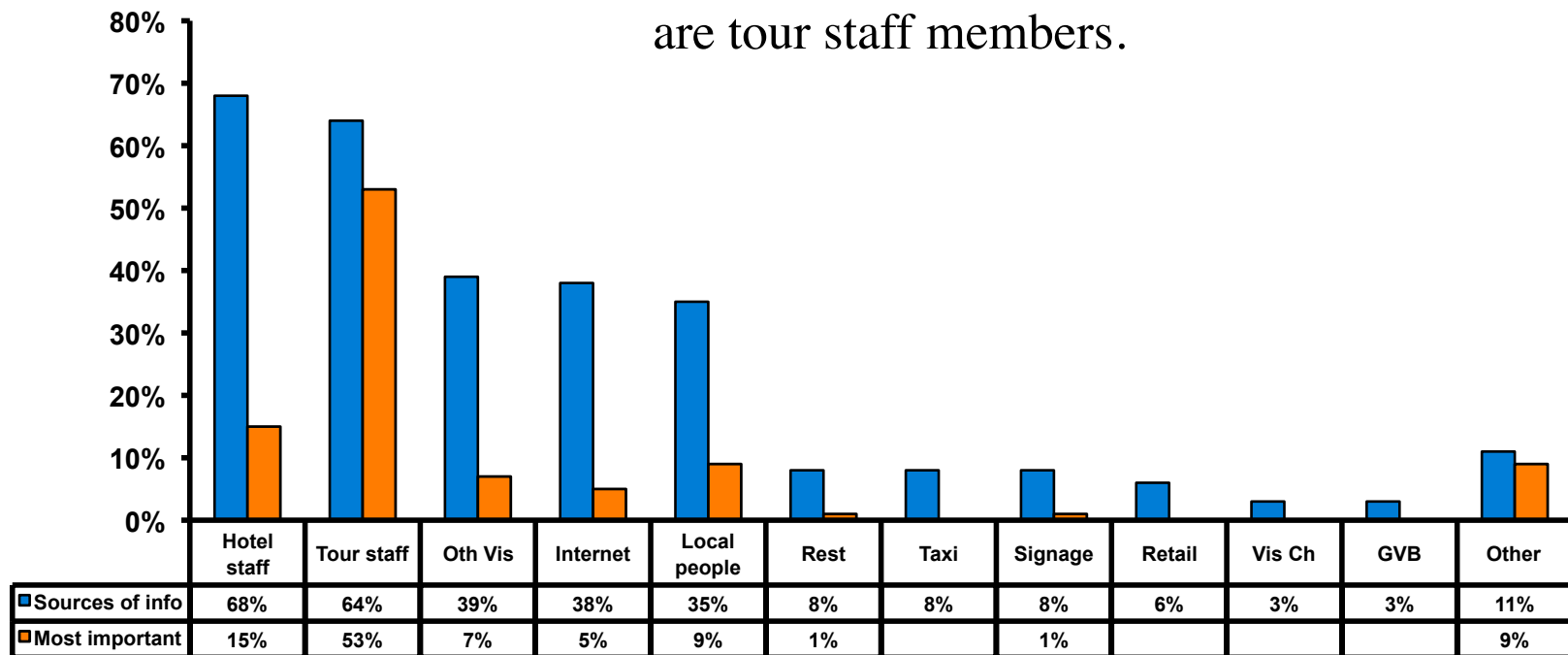
# Sources of Information Pre-arrival

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



# Sources of Information Post-arrival

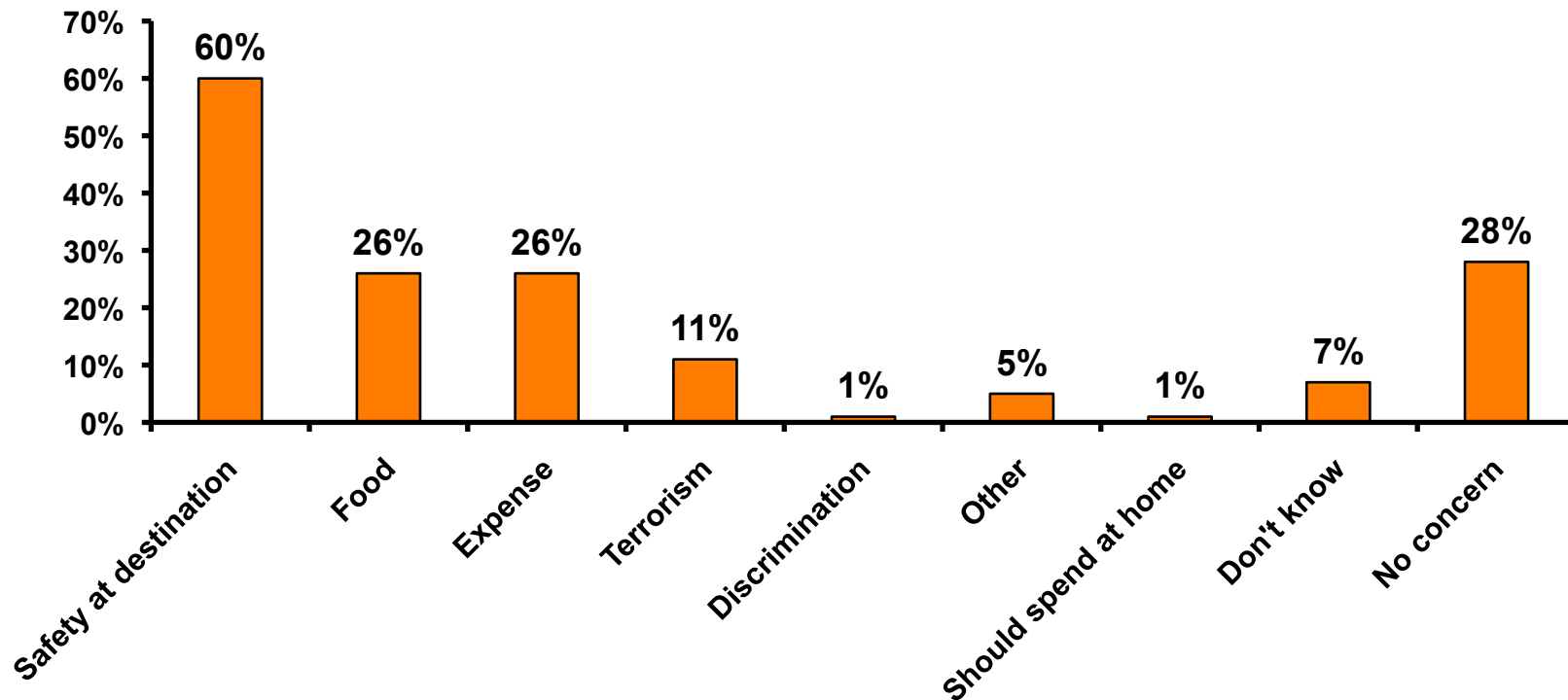
- The primary local source of information are tour staff members.





# SECTION 6 **OTHER ISSUES**

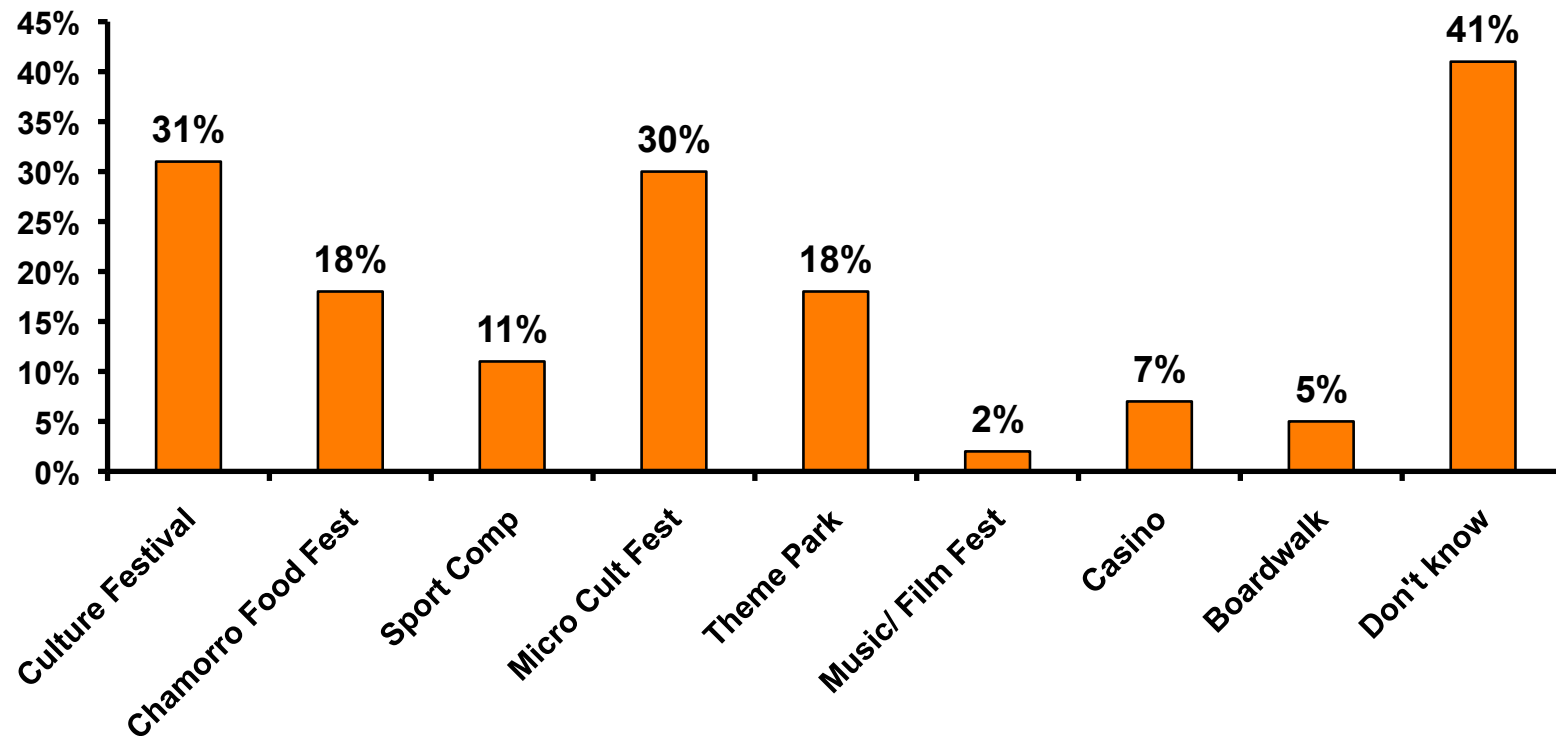
# Concerns about travel outside of Russia - Overall



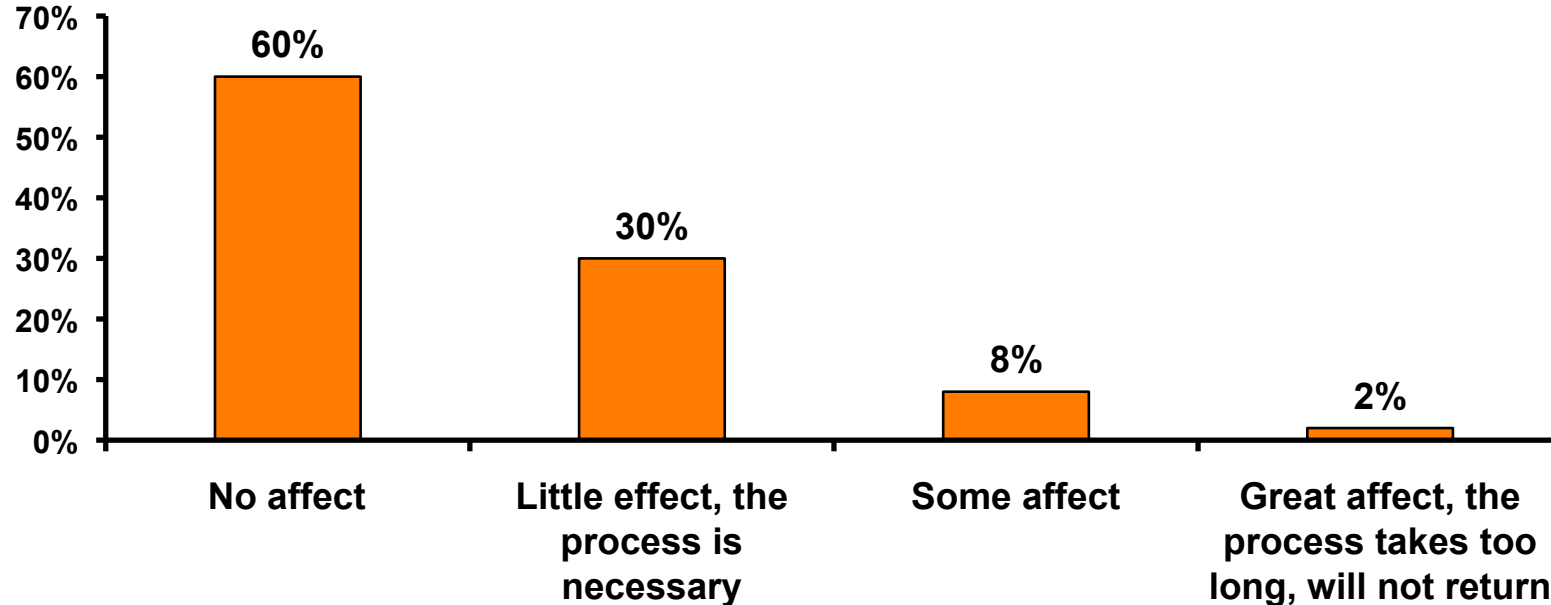
# Concerns about travel outside of Russia - By Age & Income

	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	2,563,125-3,661,606	3,661,607+
Q21 Safety	60%	100%	72%	53%	64%	68%	61%	55%	69%	38%	33%		
No concerns	28%		28%	31%	18%	16%	27%	30%	23%	50%	67%	100%	
Food Expense	26%	100%	25%	29%	14%	40%	18%	20%	46%	38%			
Terrorism	11%		9%	10%	18%	4%	19%		8%				
Don't know	7%		3%	9%	4%	4%	9%		8%				
Other	5%		9%	3%	4%	4%	3%	5%	23%				
Discrimination against Russians	1%			2%			1%			13%			
Should spend at home	1%			2%		4%	1%						
Total	Count	151	1	32	89	28	25	77	20	13	8	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

