



# **GUAM VISITORS BUREAU**

## **Russia Visitor Tracker Exit Profile**

### **FY2013**

### **4th Qtr. (JULY~SEPT 2013)**



**Prepared by: QMark Research**

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# Background & Methodology

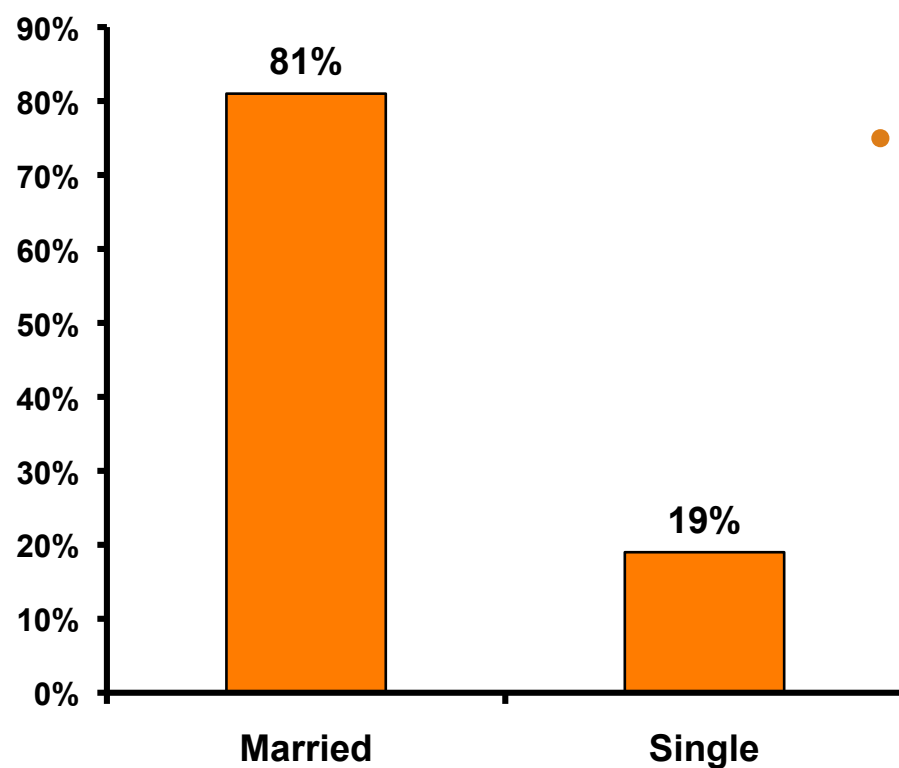
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **150** departing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

# 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.

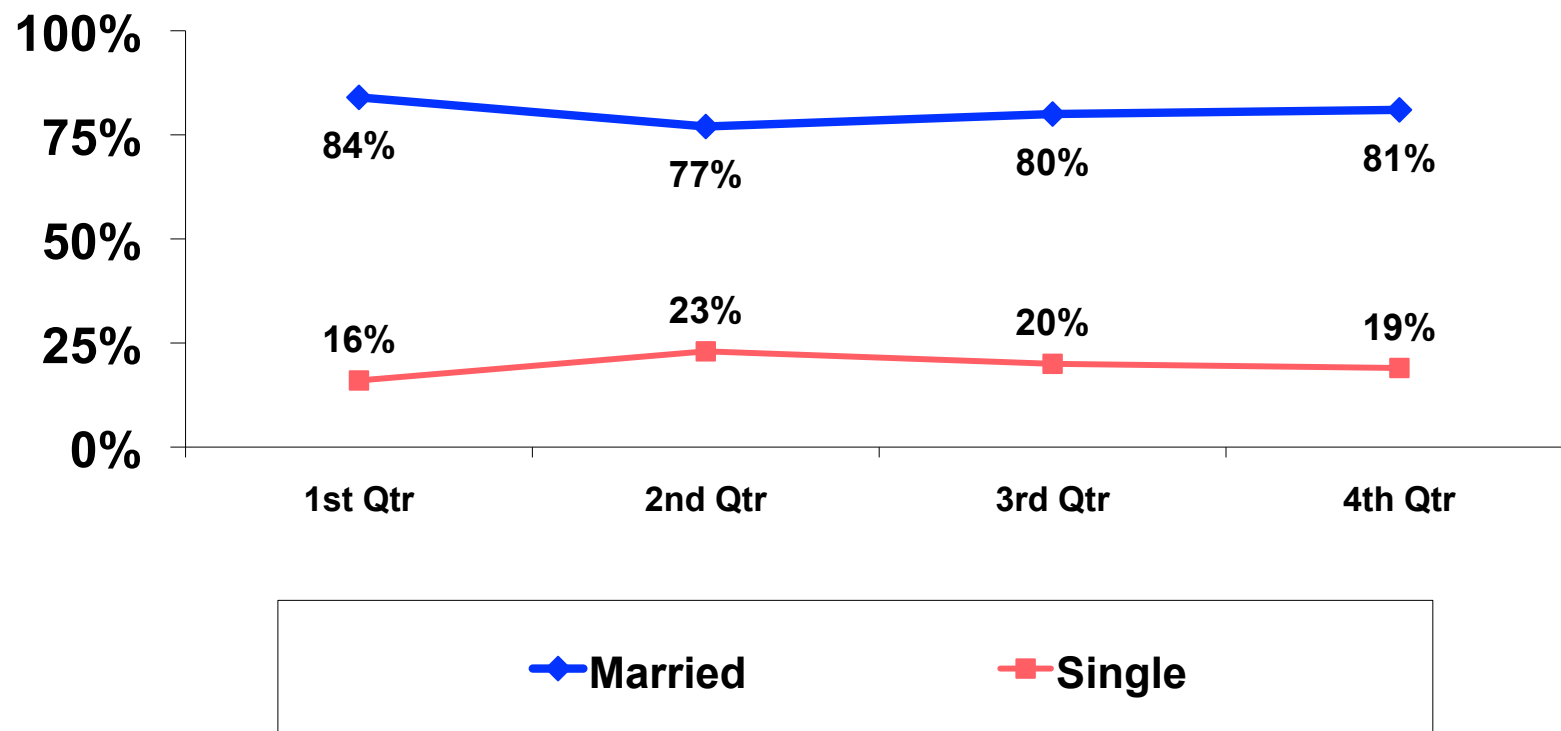
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

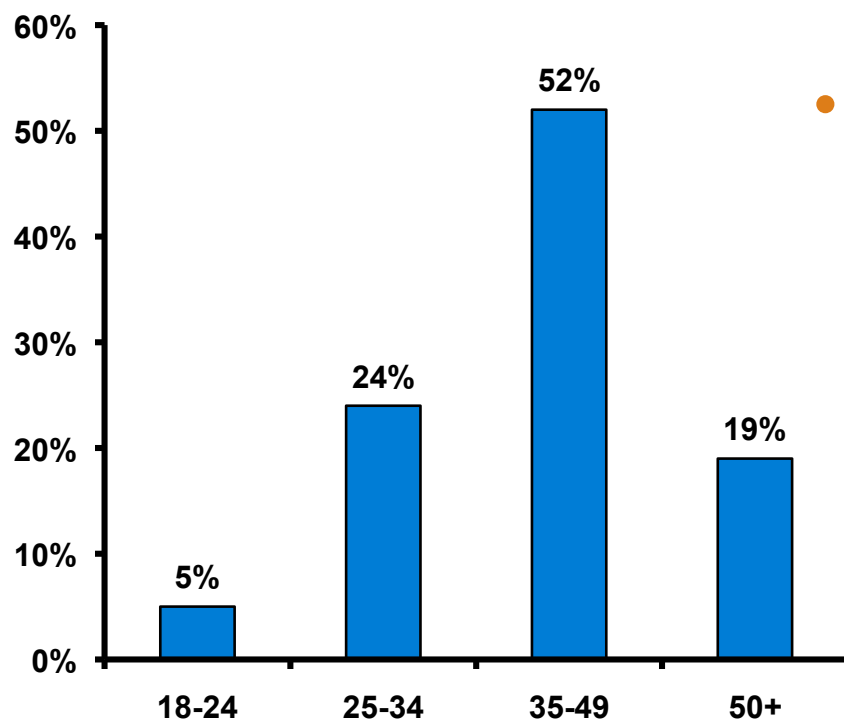


- Majority of Russian visitors are married.

# Marital Status

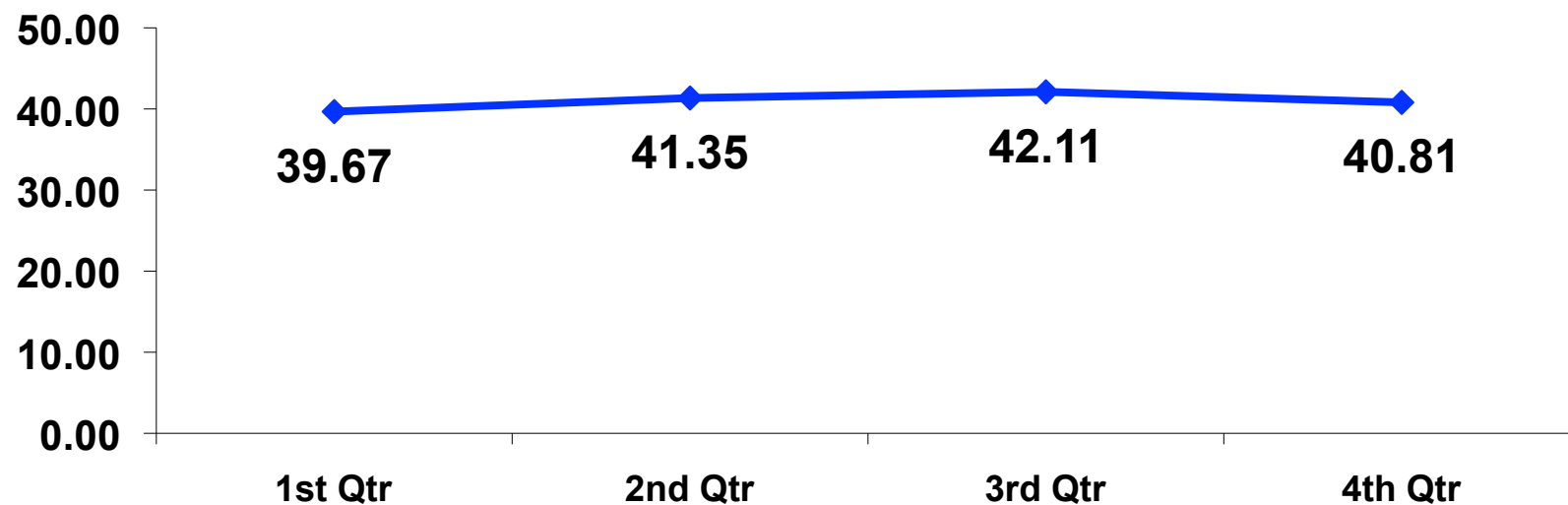


# Age - Overall



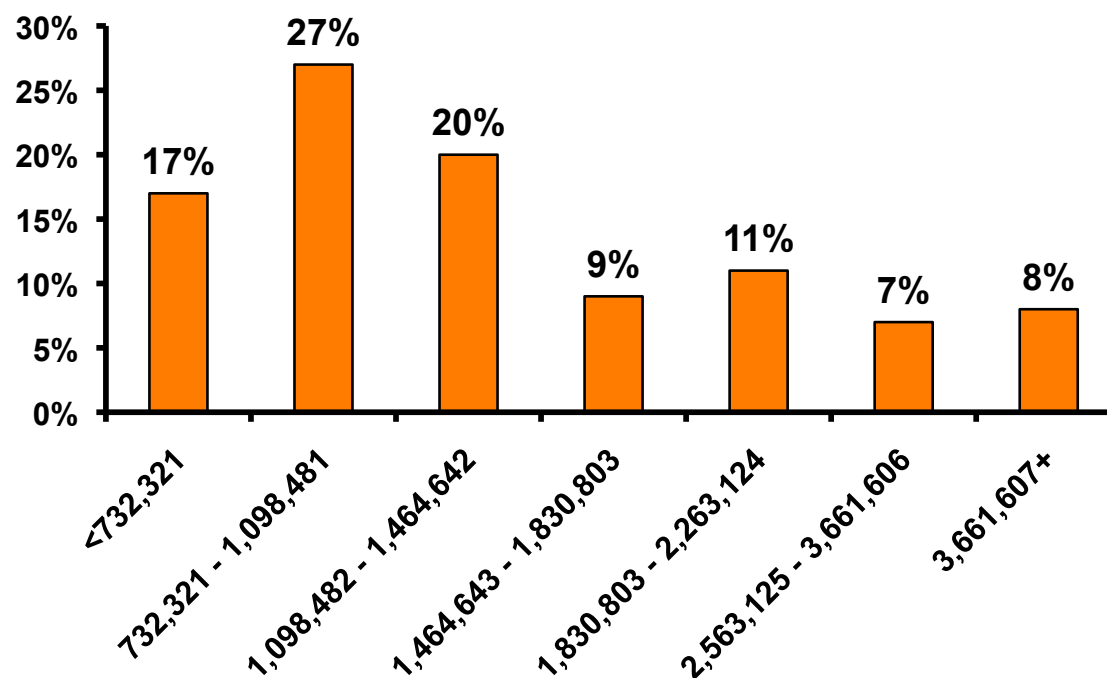
- The average age of the respondents is 40.81 years of age.

# Average Age



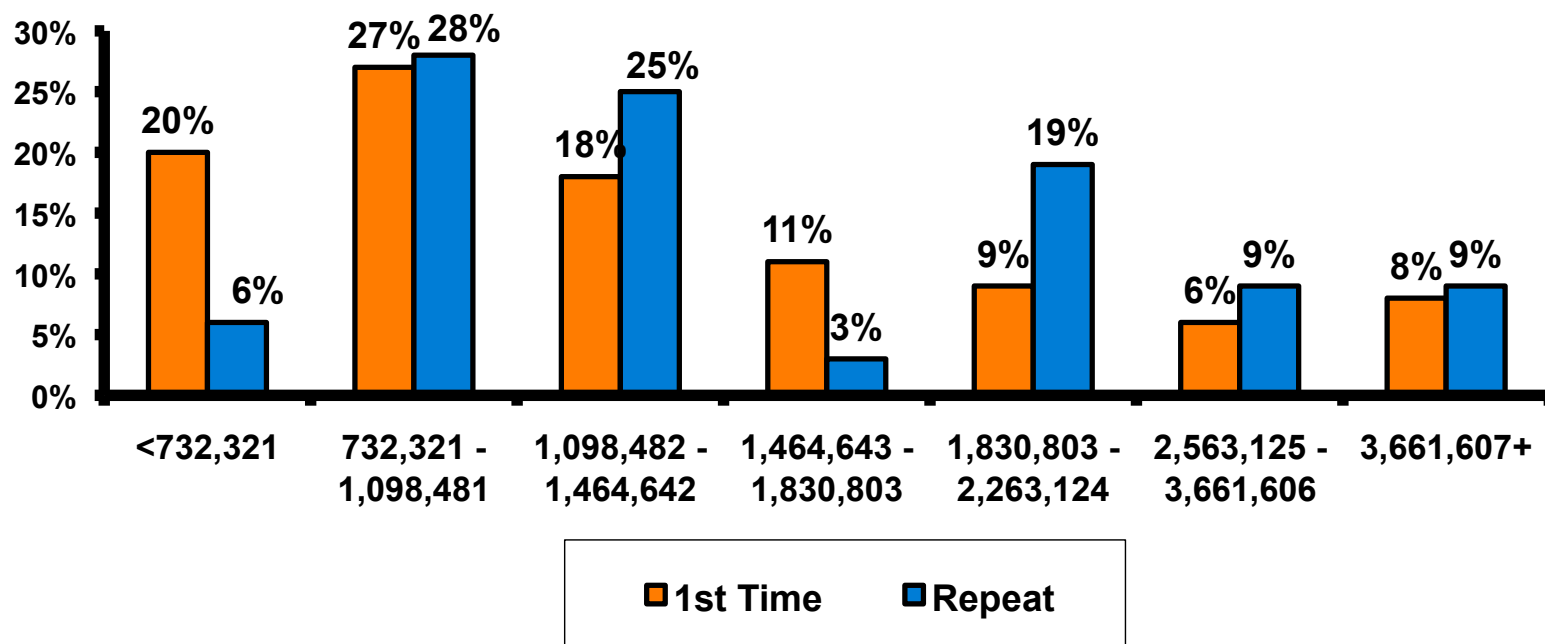


# Personal Income



- Ruble 32.74= \$1

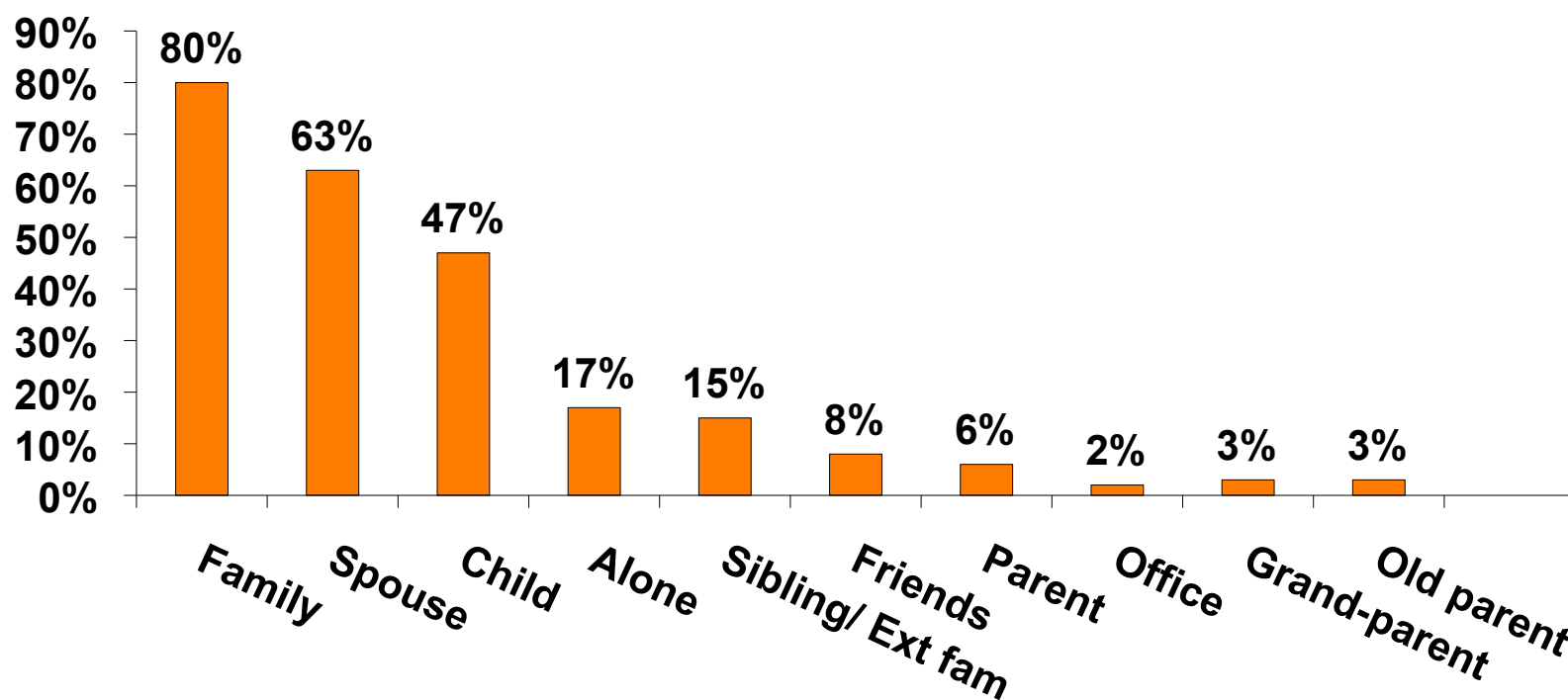
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q27	<732,321	Count	25	6	19	2	4	9	10
		Column N %	17%	8%	26%	29%	11%	12%	34%
	732,321-1,098,481	Count	40	19	21	1	11	22	6
		Column N %	27%	26%	29%	14%	31%	30%	21%
	1,098,482-1,464,642	Count	29	16	13	1	6	17	5
		Column N %	20%	22%	18%	14%	17%	23%	17%
	1,464,643-1,830,803	Count	13	9	4		4	6	3
		Column N %	9%	12%	5%		11%	8%	10%
	1,830,803-2,263,124	Count	16	8	8	1	5	8	2
		Column N %	11%	11%	11%	14%	14%	11%	7%
	2,563,125-3,661,606	Count	10	6	4		3	6	1
		Column N %	7%	8%	5%		8%	8%	3%
	3,661,607+	Count	12	8	4	1	3	6	2
		Column N %	8%	11%	5%	14%	8%	8%	7%
	No Income	Count	1	1		1			
		Column N %	1%	1%		14%			

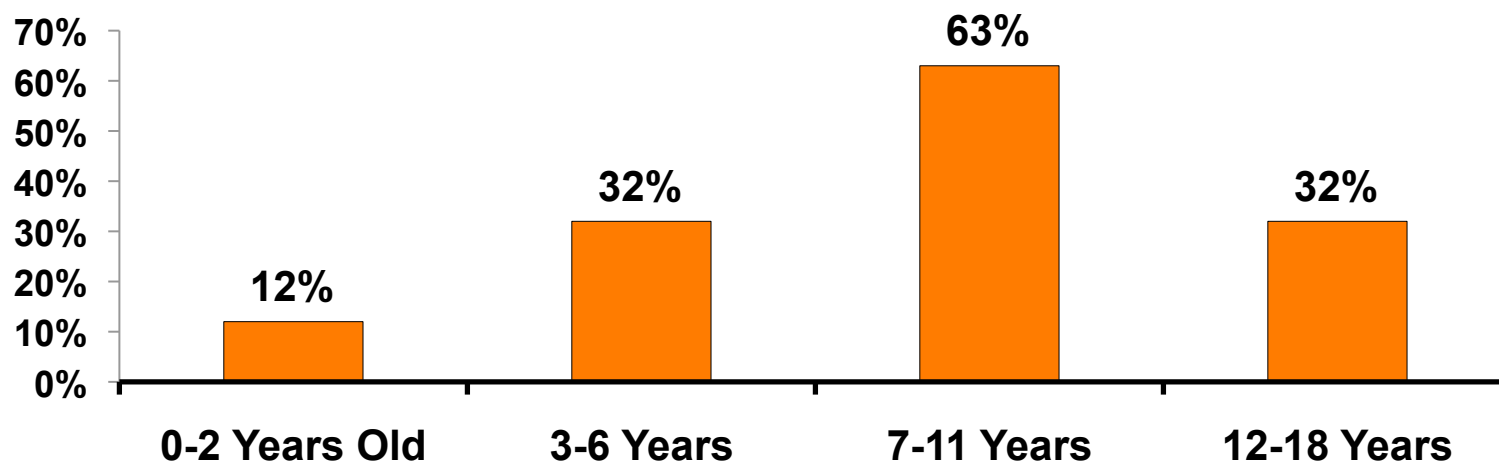
# Travel Companions



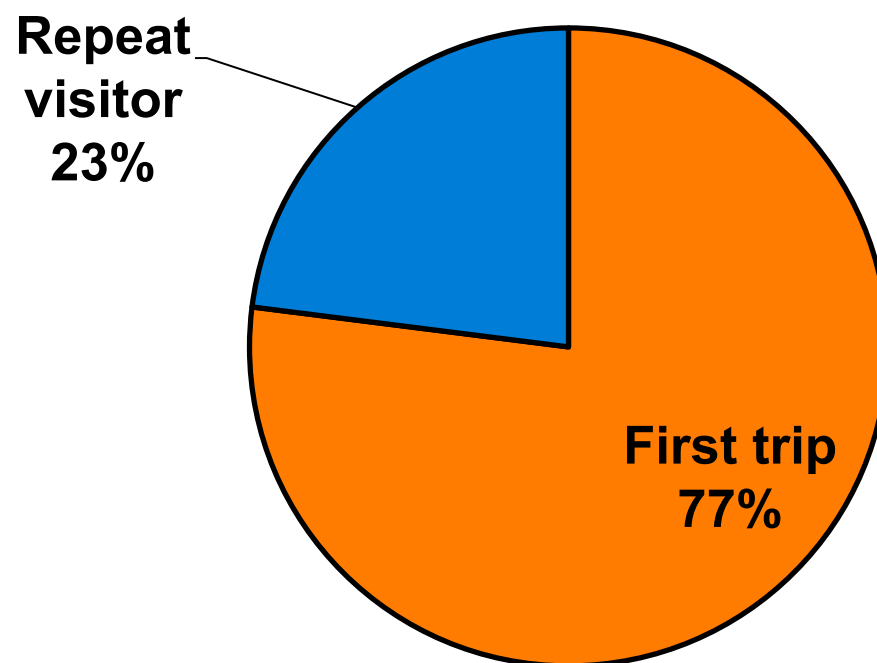
# Number of Children Travel Party

N=68 total respondents traveling with children.

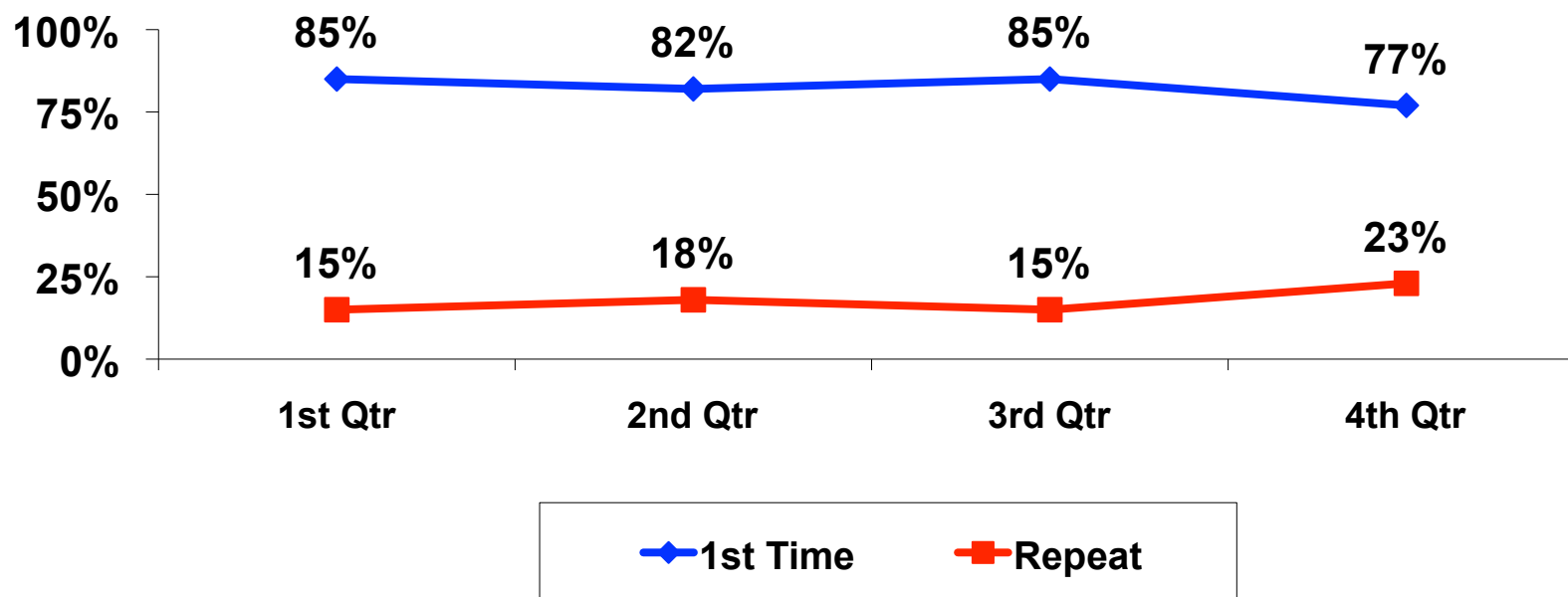
(Of those N=68 respondents, there is a total of 95 children 18 years or younger)



# Prior Trips to Guam



# Prior Trips to Guam



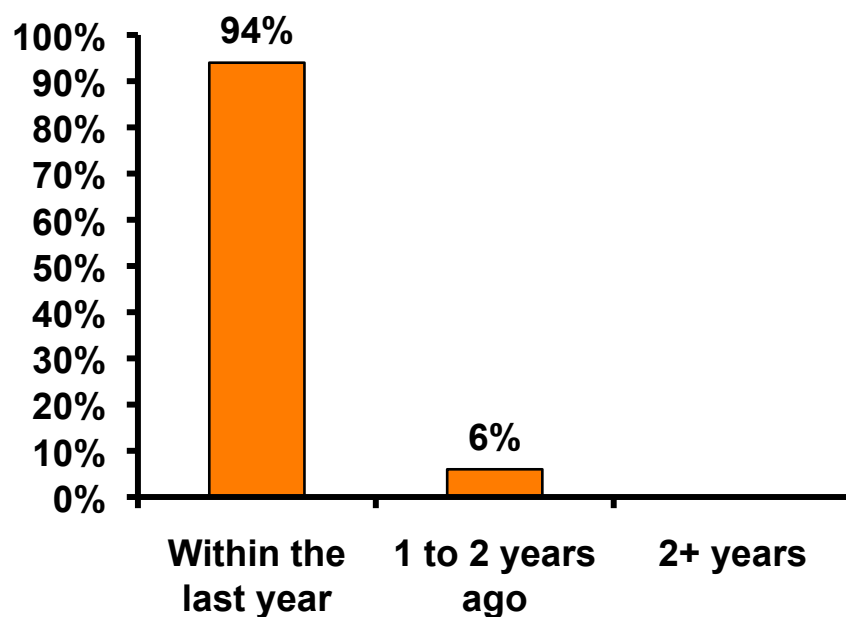
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	75	57	18
		Column N %	50%	49%	53%
	Female	Count	75	59	16
		Column N %	50%	51%	47%
AGE	Total	Count	150	116	34
	18-24	Count	7	7	
		Column N %	5%	6%	
	25-34	Count	36	21	15
		Column N %	24%	18%	44%
	35-49	Count	78	63	15
		Column N %	52%	54%	44%
	50+	Count	29	25	4
		Column N %	19%	22%	12%
	Total	Count	150	116	34



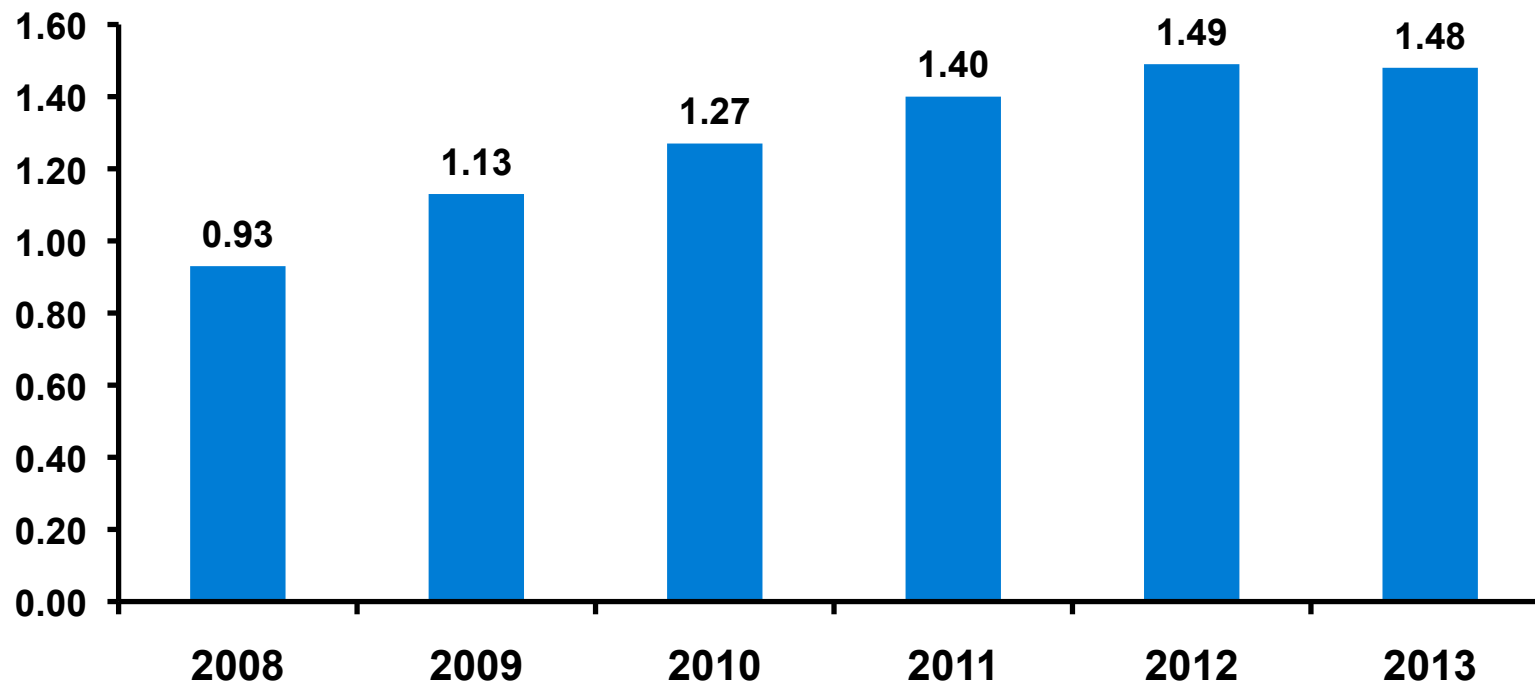
# Repeat Visitors Last Trip

n = 34



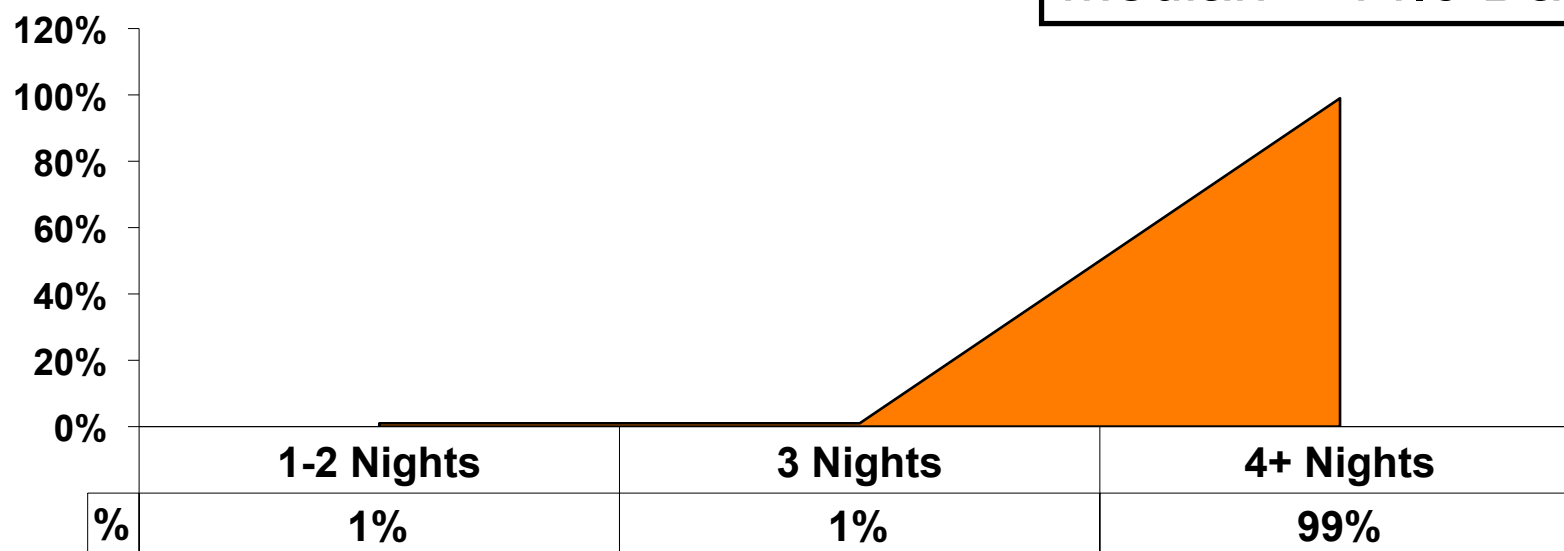
- The average repeat visitor has been to Guam 1.47 times.
- A majority of the repeat visitors have been to Guam within the last years.

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

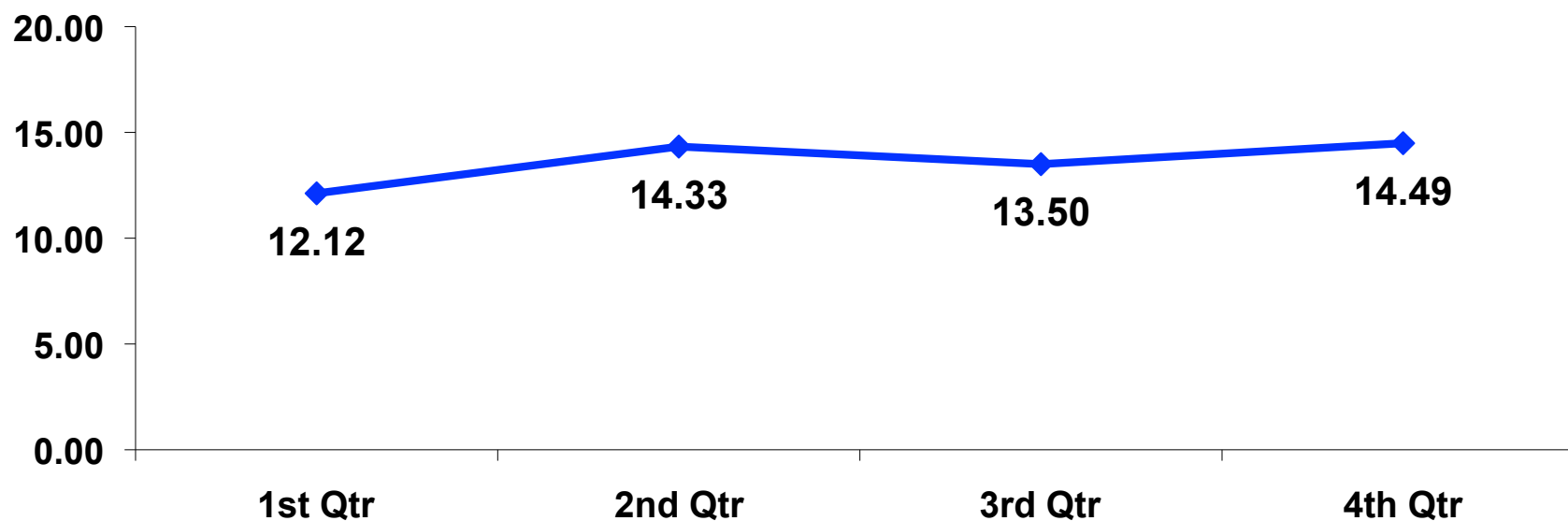


# Length of Stay

Mean = 14.49 Days  
Median = 14.0 Days



# Average Length of Stay

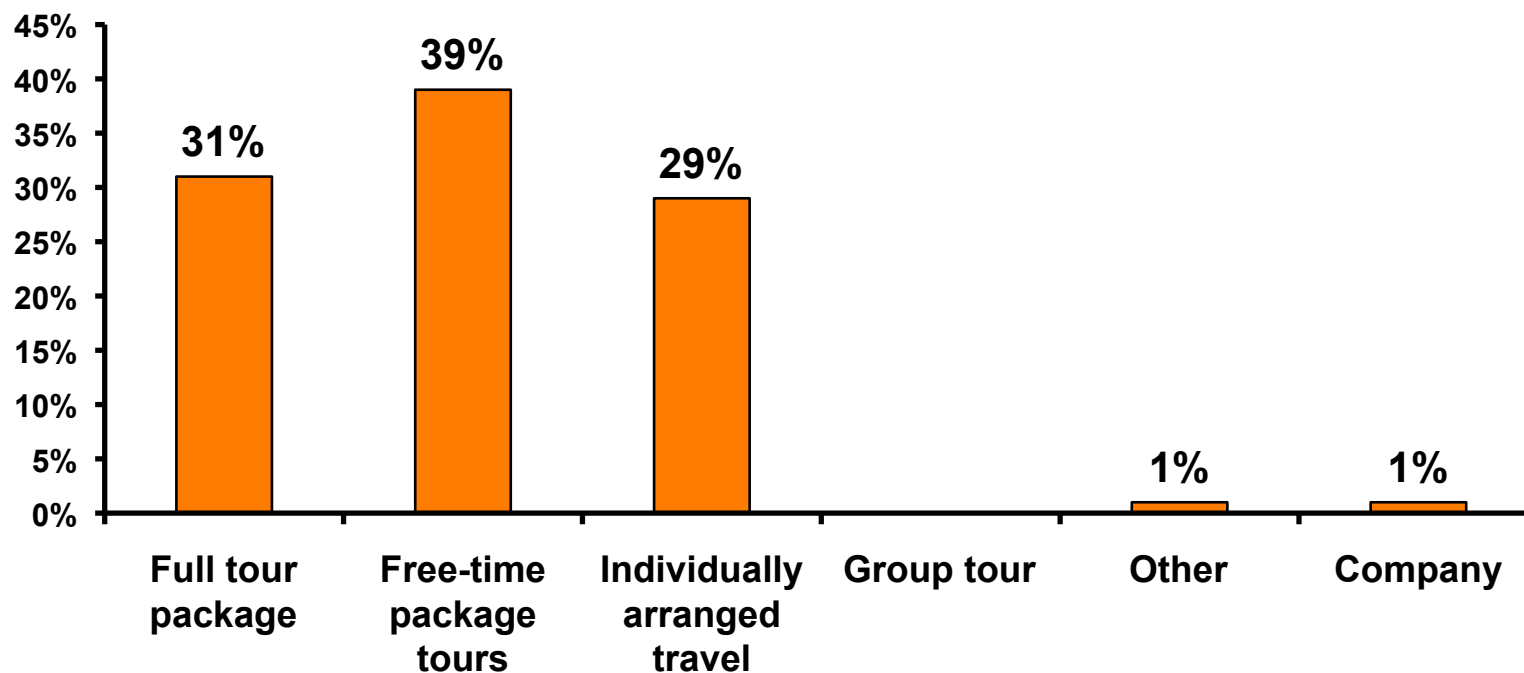


# Occupation by Income

		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	23%	8%		14%	54%	56%	60%	58%	100%
	Professional/ Specialist	21%		33%	34%	23%	6%		25%	
	Company: Office/ Non-Mgr	10%	8%	28%	7%					
	Retired	7%	36%	3%	3%					
	Homemaker	7%	4%	8%	3%	8%	13%	10%	8%	
	Company: Exec	5%	4%		3%	8%	13%	20%	8%	
	Company: Engineer	5%	8%	3%	10%		6%	10%		
	Govt: Office/ Non-Mgr	4%	4%	10%	3%					
	Company: Manager	4%		5%	7%	8%				
	Other	3%	8%	3%	3%					
	Teacher	3%	12%	3%						
	Govt: Manager	3%	4%	3%	7%					
	Govt: Executive	2%		3%	3%		6%			
	Unemployed	1%	4%							
	Student	1%								
	Company: Salesperson	1%		3%						
	Total	Count	149	25	40	29	13	16	10	

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



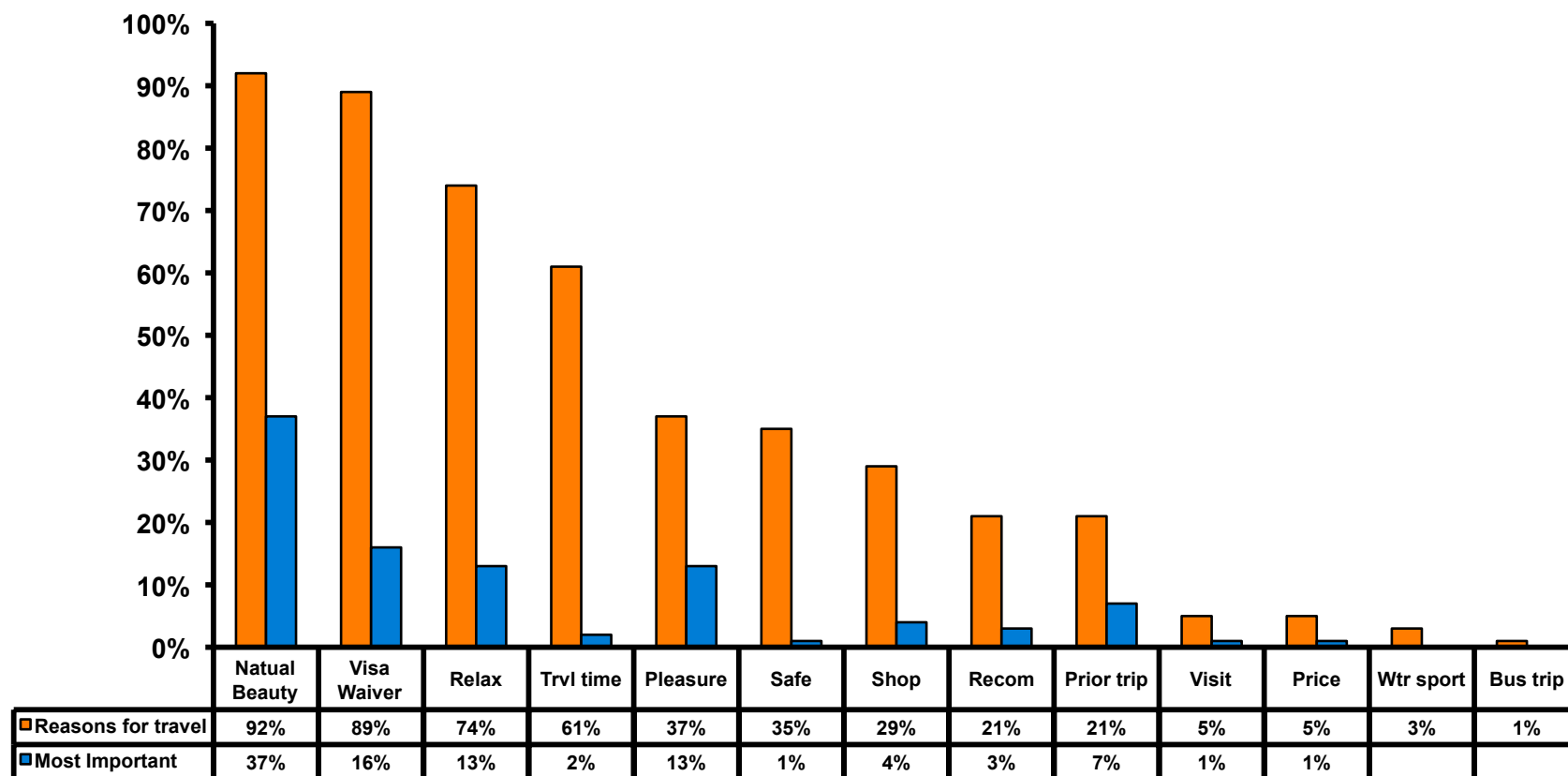
# Accommodation by Income

Average length of stay: 14.49 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	31%	40%	35%	28%	23%	25%	30%	17%	100%
	Westin Resort Guam	23%	8%	13%	17%	31%	44%	50%	50%	
	Fiesta Resort Guam	15%	32%	13%	14%	31%			8%	
	Hyatt Regency Guam	7%		5%	7%	8%	19%		17%	
	Oceanview Hotel	6%	4%	15%	3%					
	Hilton Guam Resort	5%	4%	3%	10%	8%	6%		8%	
	Bayview Hotel	4%	12%	3%	3%					
	Holiday Resort Guam	4%		8%	10%					
	Guam Marriott Resort	2%			3%		6%	10%		
	Verona Resort & Spa	1%		3%						
	Onward Beach Resort	1%			3%			10%		
	Outrigger Guam Resort	1%		5%						
	Total Count	150	25	40	29	13	16	10	12	1



# Travel Motivation - Top Responses



# **Most Important Reason for Choosing Guam**

- Guam's natural beauty/ beaches,
- Visa waiver,
- Relaxation and 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	Natural beauty	92%	71%	92%	94%	93%	95%	89%
	No Visa required	89%	71%	94%	90%	86%	92%	87%
	Relax	74%	43%	69%	77%	79%	71%	77%
	Short travel time	61%		58%	72%	52%	63%	60%
	Pleasure	37%	29%	36%	41%	31%	39%	36%
	Safe	35%	14%	25%	38%	45%	33%	37%
	Shopping	29%	29%	33%	27%	28%	23%	35%
	Recomm- friend/family/trvl agnt	21%	43%	19%	21%	21%	20%	23%
	Previous trip	21%		39%	19%	10%	23%	20%
	Visit friends/ Relatives	5%	29%	3%	5%		4%	5%
	Price	5%		6%	5%	3%	7%	3%
	Water sports	3%		6%	3%	3%	4%	3%
	Other	2%	14%	6%			3%	1%
	Company/ Business Trip	1%			1%	3%	3%	
	Scuba	1%		3%	1%		3%	
	Organized sports	1%			1%		1%	
	Honeymoon	1%	14%				1%	
	Married/ Attn wedding	1%		3%			1%	
	Company Sponsored	1%				3%		1%
	Total Count	150	7	36	78	29	75	75

# Motivation by Income

		TOTAL	Q27							No Income
		-	<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+	
Q5A	Natural beauty	92%	92%	88%	100%	100%	100%	70%	92%	100%
	No Visa required	89%	96%	95%	90%	100%	75%	80%	83%	
	Relax	74%	76%	85%	79%	69%	44%	80%	67%	
	Short travel time	61%	60%	58%	69%	62%	63%	70%	50%	
	Pleasure	37%	40%	30%	38%	38%	50%	20%	50%	
	Safe	35%	24%	35%	28%	54%	44%	50%	42%	
	Shopping	29%	32%	25%	28%	15%	38%	30%	42%	
	Recomm- friend/family/trvl agnt	21%	36%	18%	14%	15%	19%	20%	25%	
	Previous trip	21%	8%	20%	24%	8%	38%	30%	25%	
	Visit friends/ Relatives	5%	4%				6%	10%	33%	
	Price	5%		10%	7%	8%				
	Water sports	3%	4%	5%		8%			8%	
	Other	2%	4%	3%		8%				
	Company/ Business Trip	1%	4%						8%	
	Scuba	1%	4%				6%			
	Organized sports	1%						10%		
	Honeymoon	1%	4%							
	Married/ Attn wedding	1%		3%						
	Company Sponsored	1%	4%							
	Total Count	150	25	40	29	13	16	10	12	1

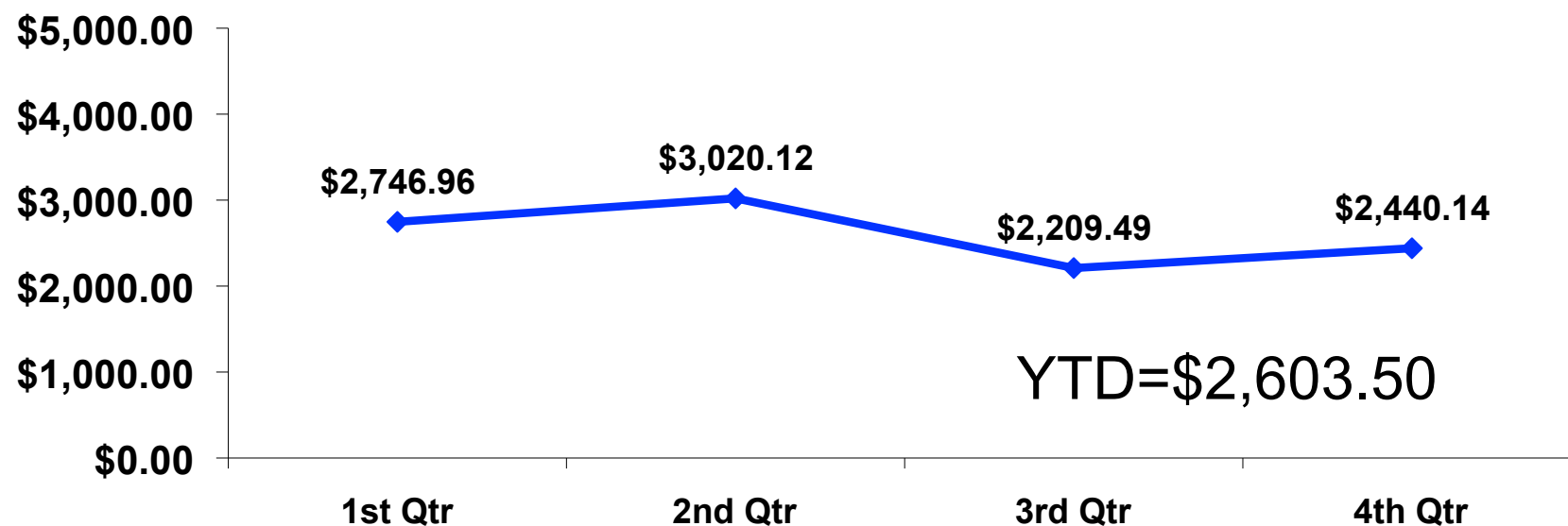
# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures

Ruble 32.74 /US\$1

- \$5,960.52 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$19,856 = maximum (highest amount recorded for the entire sample)
- \$2,440.14 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person



# Breakdown of Prepaid Expenditures

Rub 32.74=\$1

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

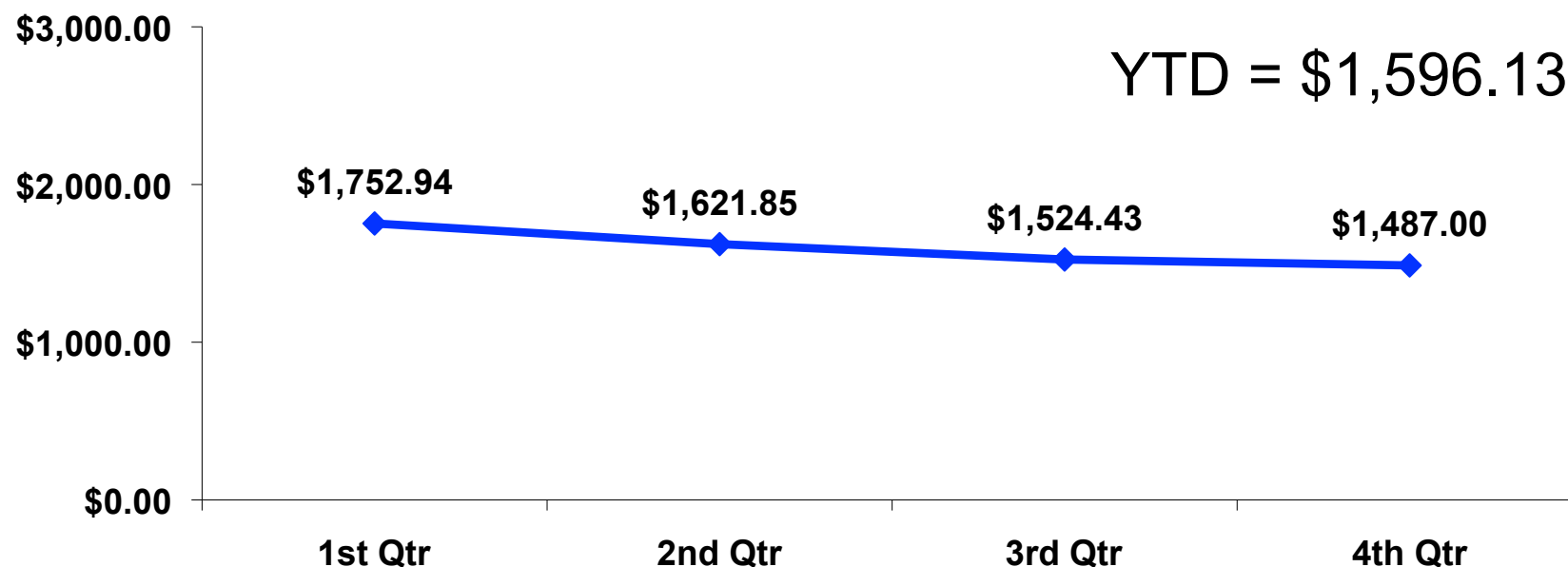
	MEAN \$
Air & Accommodation package only	\$5,599.31
Air & Accommodation w/ daily meal package	\$8,535.36
Air only	\$2,541.23
Accommodation only	\$3,245.27
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation - Russia	\$-
Ground transportation - Guam	\$-
Optional tours/ activities	\$-
Other expenses	\$610.87
Total Prepaid	\$5,960.52



# On-Island Expenditures

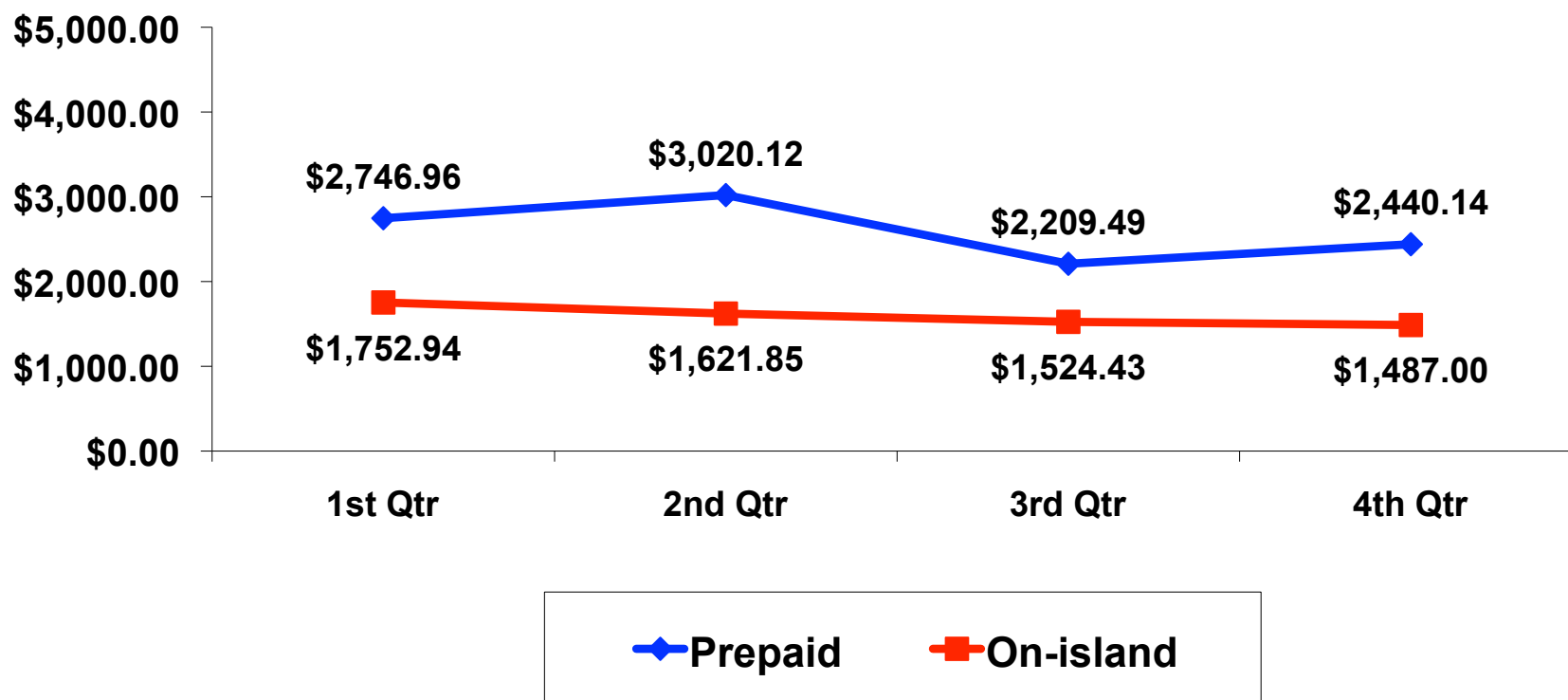
- \$3,273.04 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$20,000 = Maximum (highest amount recorded for the entire sample)
- \$1,487.00 = overall mean average per person on-island expenditure

# On-Island Expenditures Per Person



# Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$2,603.50      On-Isle YTD = \$1,596.13



# 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	\$1,487.00	\$1,422.14	\$1,551.86	\$1,505.00	\$1,345.00	\$1,355.39	\$1,725.00	\$2,090.00	\$1,567.89	\$1,623.32	\$1,315.10
	Median	\$1,217	\$1,200	\$1,260	\$1,000	\$1,250	\$1,150	\$1,450	\$2,090	\$1,360	\$1,150	\$1,260
	Minimum	\$0	\$300	\$0	\$600	\$375	\$300	\$755	\$0	\$495	\$340	\$0
	Maximum	\$6,800	\$6,800	\$5,000	\$3,000	\$3,000	\$6,800	\$5,000	\$4,180	\$4,500	\$5,000	\$2,810

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$364.15	\$432.16	\$296.13	\$200.00	\$462.78	\$389.13	\$214.14
	Median	\$175	\$300	\$0	\$200	\$300	\$275	\$0
F&B FF/STORE	Mean	\$51.41	\$49.36	\$53.47	\$128.57	\$57.50	\$57.95	\$7.66
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$501.73	\$563.20	\$440.27	\$485.71	\$493.61	\$526.92	\$447.93
	Median	\$400	\$400	\$350	\$400	\$435	\$400	\$340
OPT TOUR	Mean	\$325.73	\$362.80	\$288.67	\$171.43	\$376.67	\$367.95	\$186.21
	Median	\$200	\$150	\$200	\$0	\$225	\$300	\$0
GIFT- SELF	Mean	\$1,158.73	\$1,189.87	\$1,127.60	\$1,014.29	\$1,428.89	\$1,125.26	\$948.28
	Median	\$600	\$600	\$600	\$200	\$900	\$600	\$600
GIFT- OTHER	Mean	\$496.93	\$401.87	\$592.00	\$628.57	\$348.06	\$565.38	\$465.86
	Median	\$300	\$300	\$300	\$100	\$300	\$300	\$300
TRANS	Mean	\$209.84	\$276.33	\$143.35	\$65.71	\$242.36	\$216.94	\$185.17
	Median	\$150	\$200	\$100	\$50	\$150	\$150	\$100
OTHER	Mean	\$171.27	\$116.93	\$225.60	\$185.71	\$66.39	\$239.87	\$113.45
	Median	\$100	\$100	\$50	\$0	\$0	\$100	\$100
TOTAL	Mean	\$3,273.04	\$3,392.33	\$3,153.75	\$2,737.14	\$3,477.64	\$3,488.60	\$2,568.62
	Median	\$2,598	\$2,630	\$2,500	\$2,000	\$2,790	\$2,665	\$2,300

# On-Island Expenditures

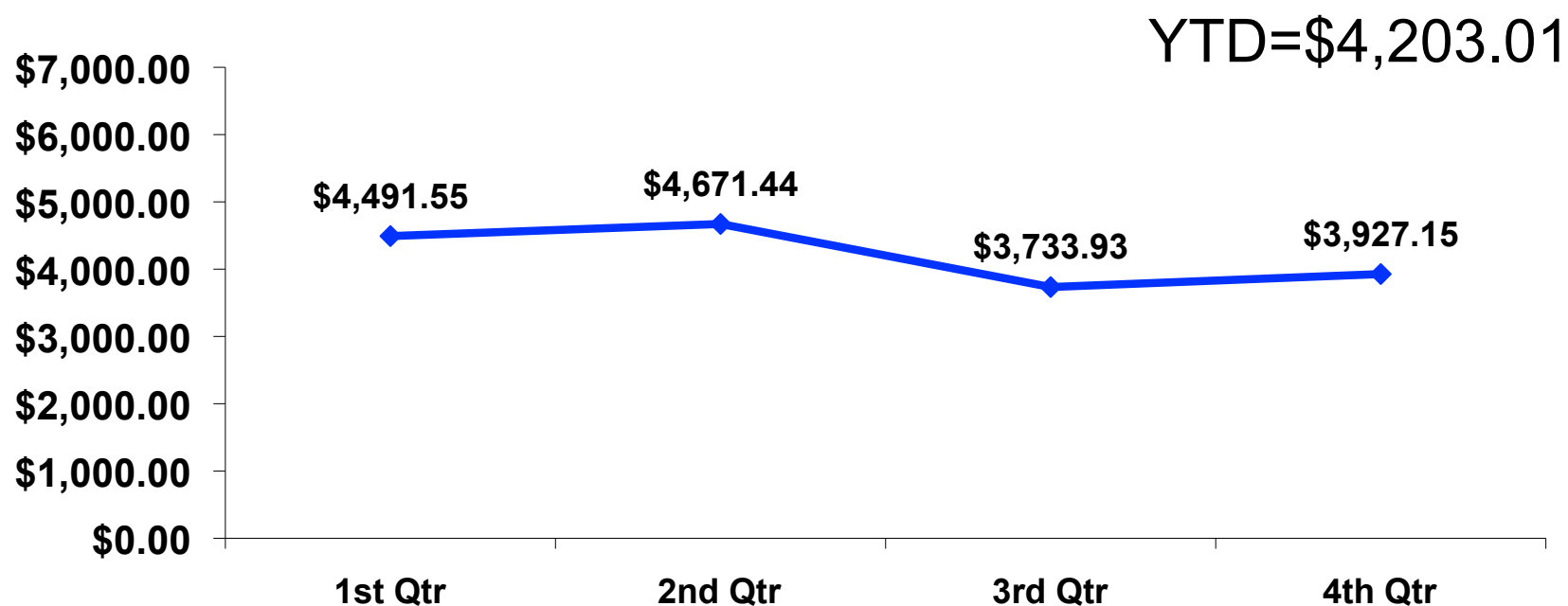
## First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$364.15	\$323.90	\$501.47
	Median	\$175	\$125	\$325
F&B FF/STORE	Mean	\$51.41	\$58.55	\$27.06
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$501.73	\$546.81	\$347.94
	Median	\$400	\$400	\$250
OPT TOUR	Mean	\$325.73	\$331.47	\$306.18
	Median	\$200	\$300	\$0
GIFT- SELF	Mean	\$1,158.73	\$1,042.41	\$1,555.59
	Median	\$600	\$600	\$900
GIFT- OTHER	Mean	\$496.93	\$505.95	\$466.18
	Median	\$300	\$300	\$300
TRANS	Mean	\$209.84	\$184.19	\$297.35
	Median	\$150	\$150	\$220
OTHER	Mean	\$171.27	\$196.38	\$85.59
	Median	\$100	\$100	\$50
TOTAL	Mean	\$3,273.04	\$3,180.91	\$3,587.35
	Median	\$2,598	\$2,622	\$2,540

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

- \$3,927.15 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$11,687 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures Per Person



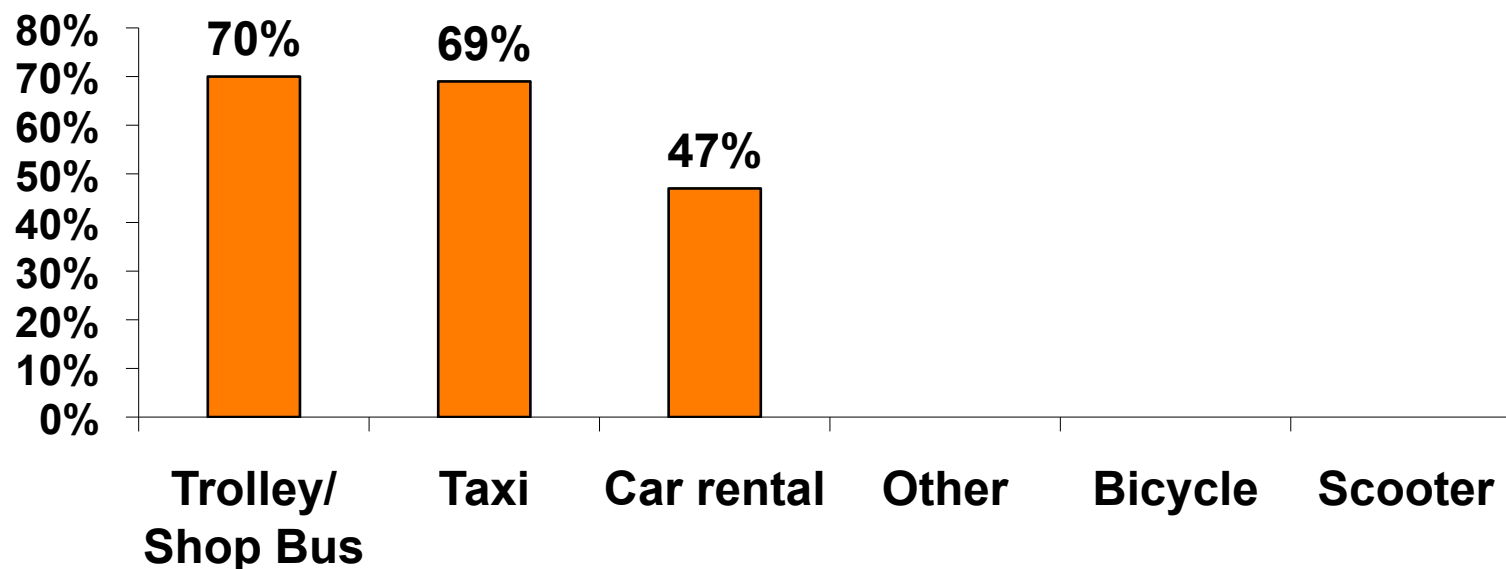


# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$364.15
Food & beverage in fast food restaurant/ convenience store	\$51.41
Food & beverage at restaurants or drinking establishments outside a hotel	\$501.73
Optional tours and activities	\$325.73
Gifts/ souvenirs for yourself/companions	\$1,158.73
Gifts/ souvenirs for friends/family at home	\$496.93
Local transportation	\$209.84
Other expenses not covered	\$171.27
<b>Average Total</b>	<b>\$3,273.04</b>

# Local Transportation

n=131



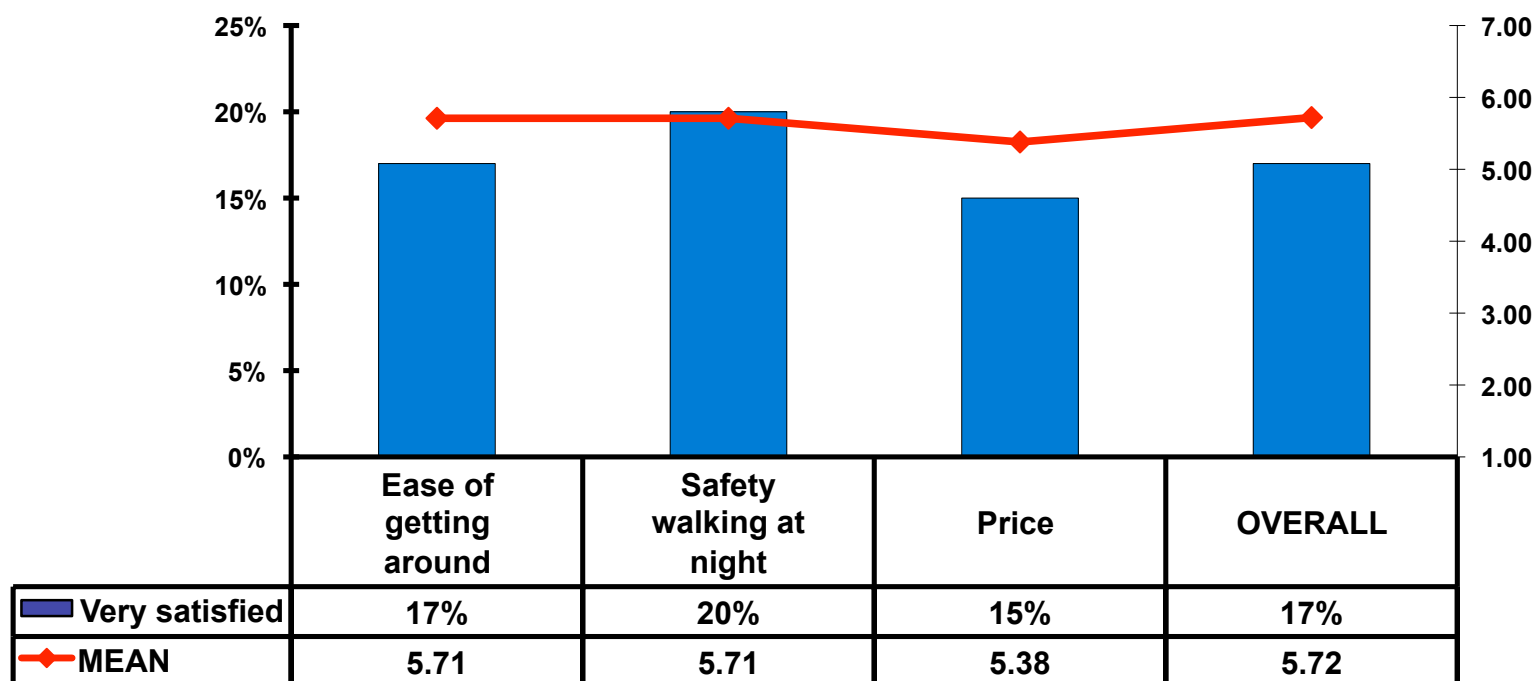
Mean=\$209.84 per travel party

# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

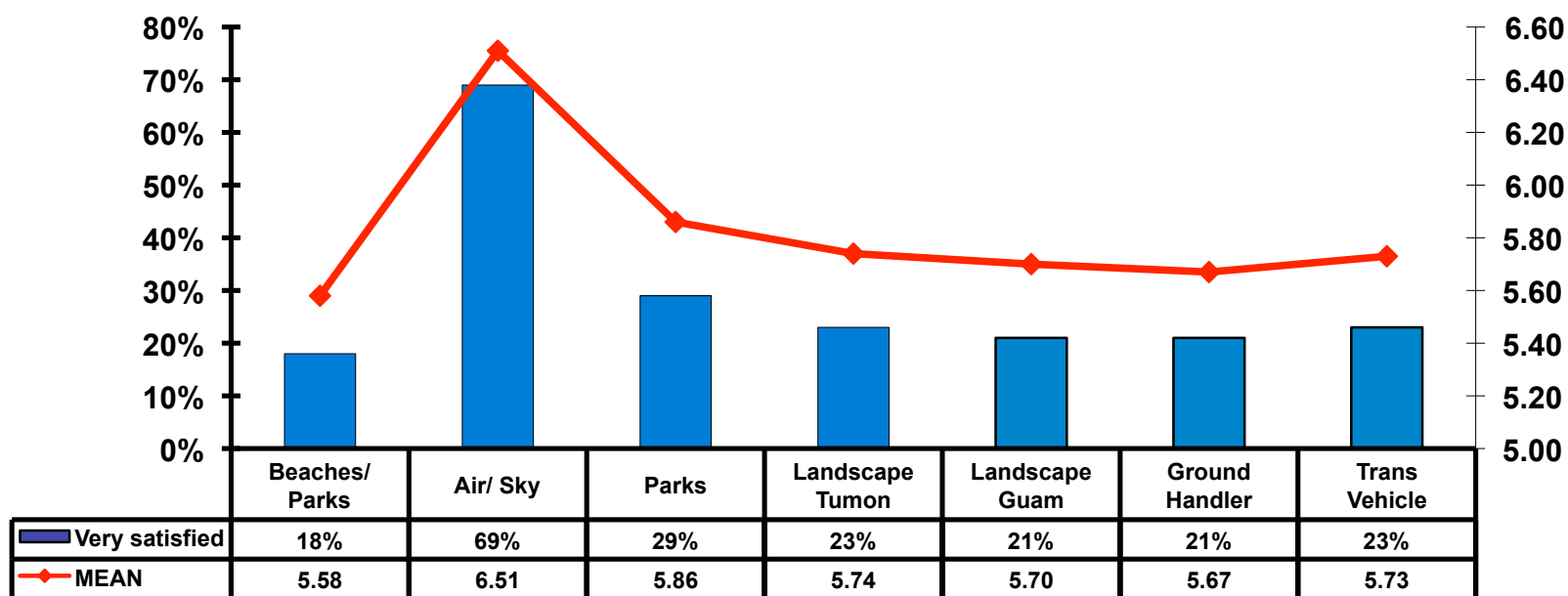
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

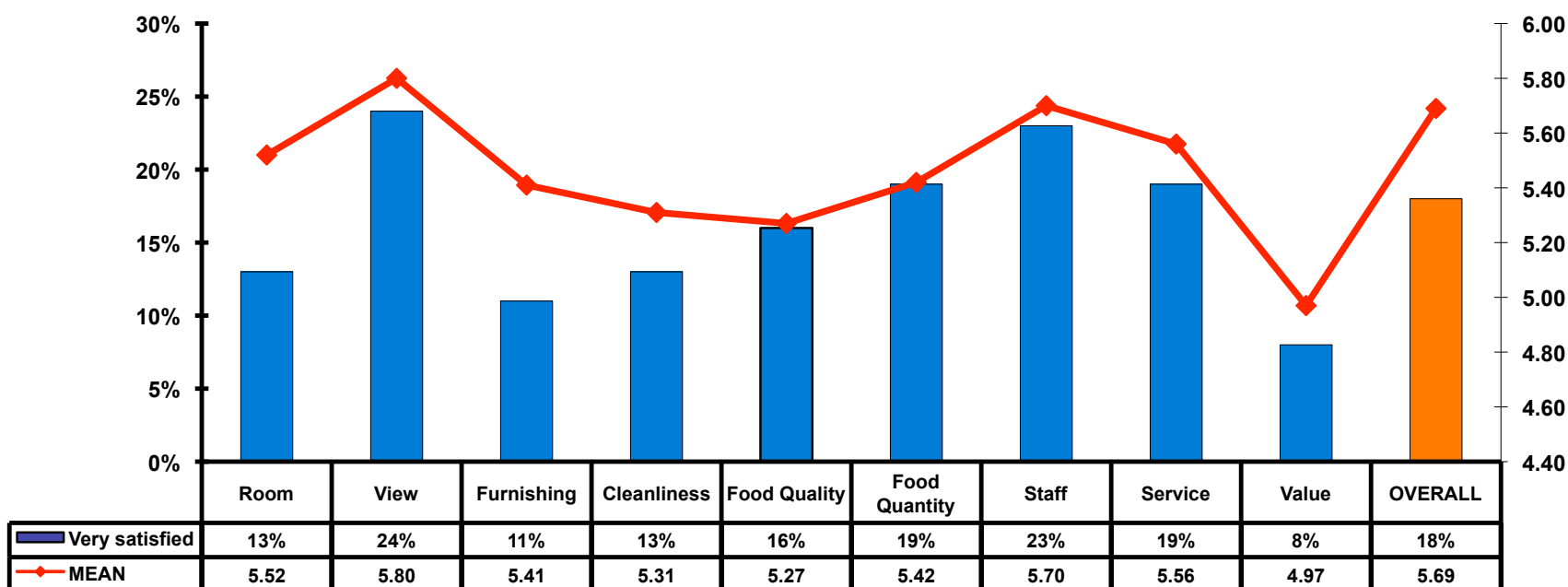
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

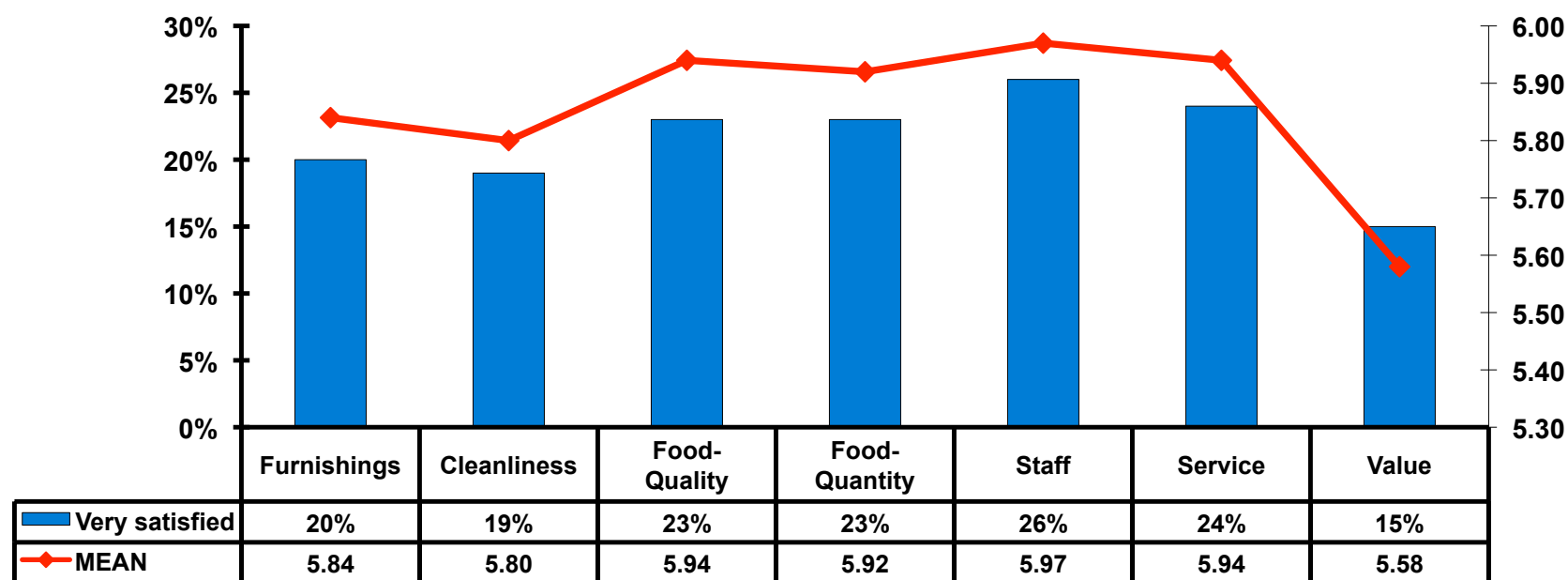
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

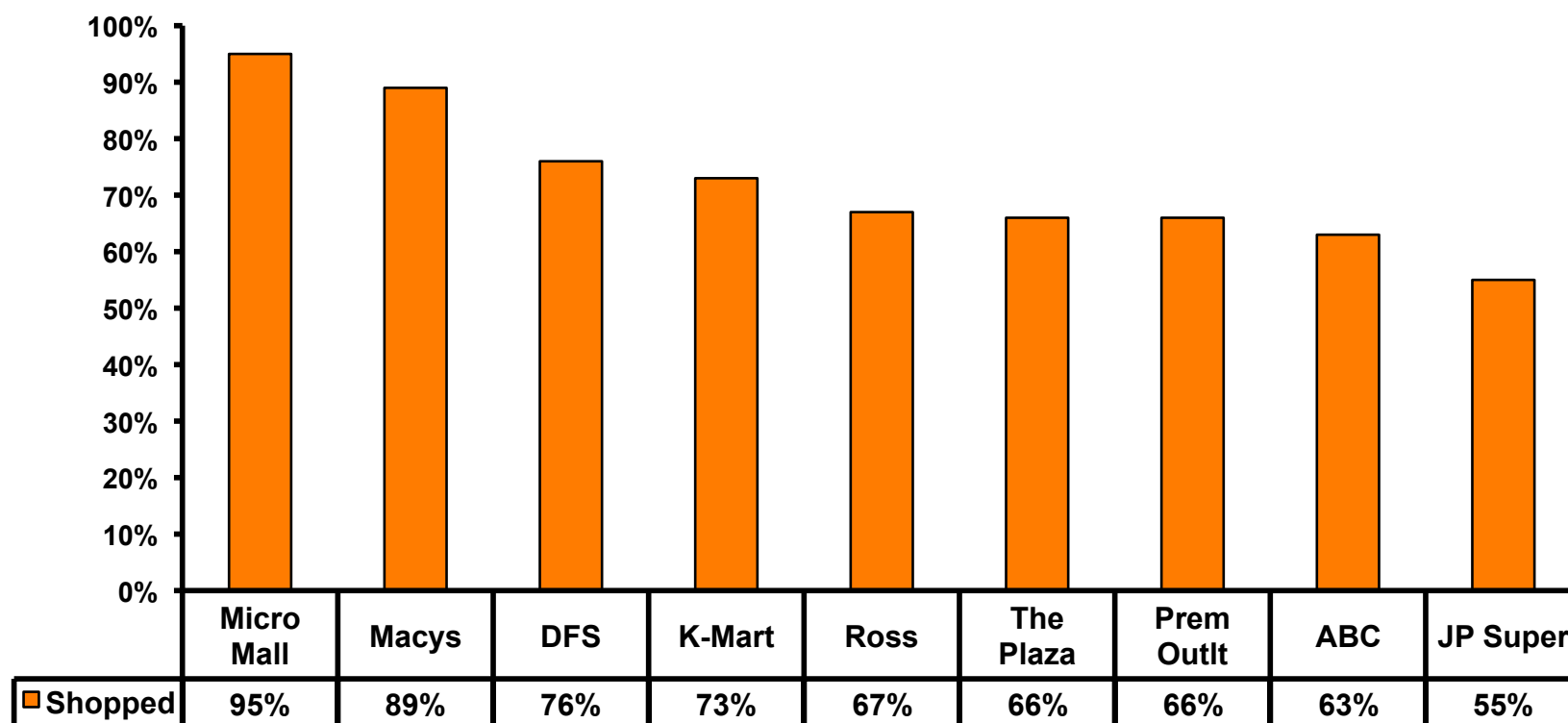
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses





# Satisfaction with Shopping

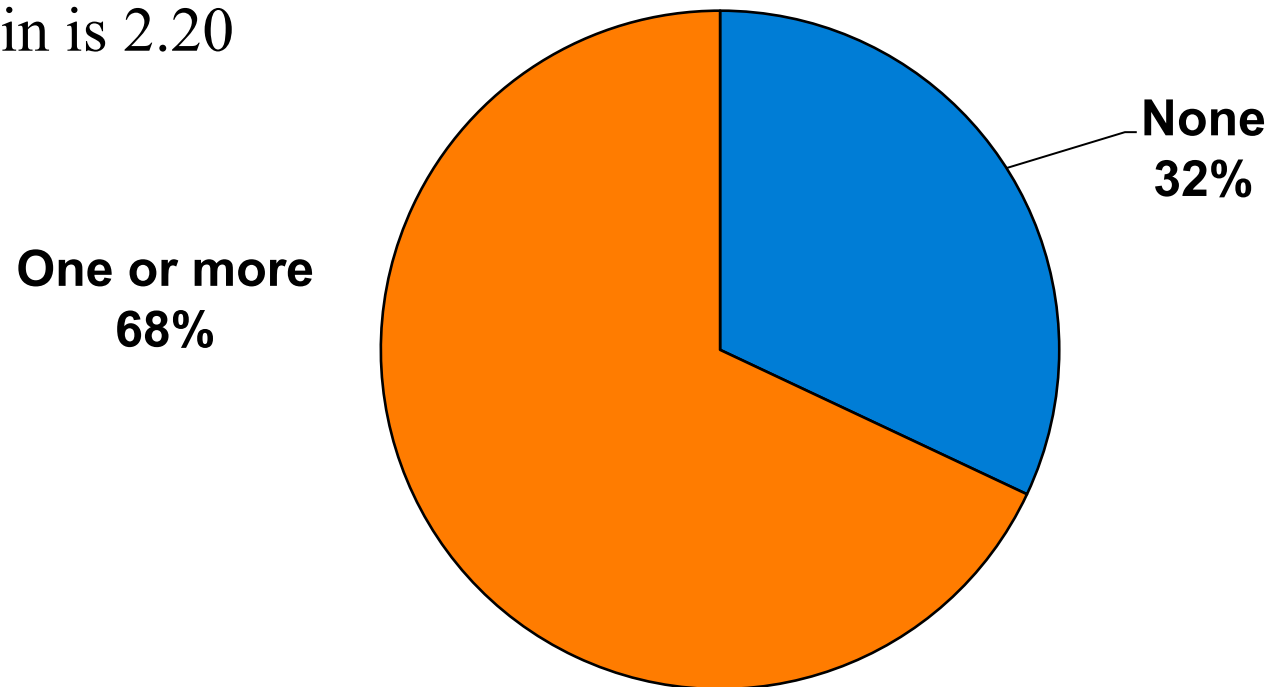
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>51%</b>	Score of 6 to 7 = <b>54%</b>
Score of 4 to 5 = <b>44%</b>	Score of 4 to 5 = <b>43%</b>
Score 1 to 3 = <b>5%</b>	Score 1 to 3 = <b>4%</b>
<b>MEAN = 5.54</b>	<b>MEAN = 5.55</b>

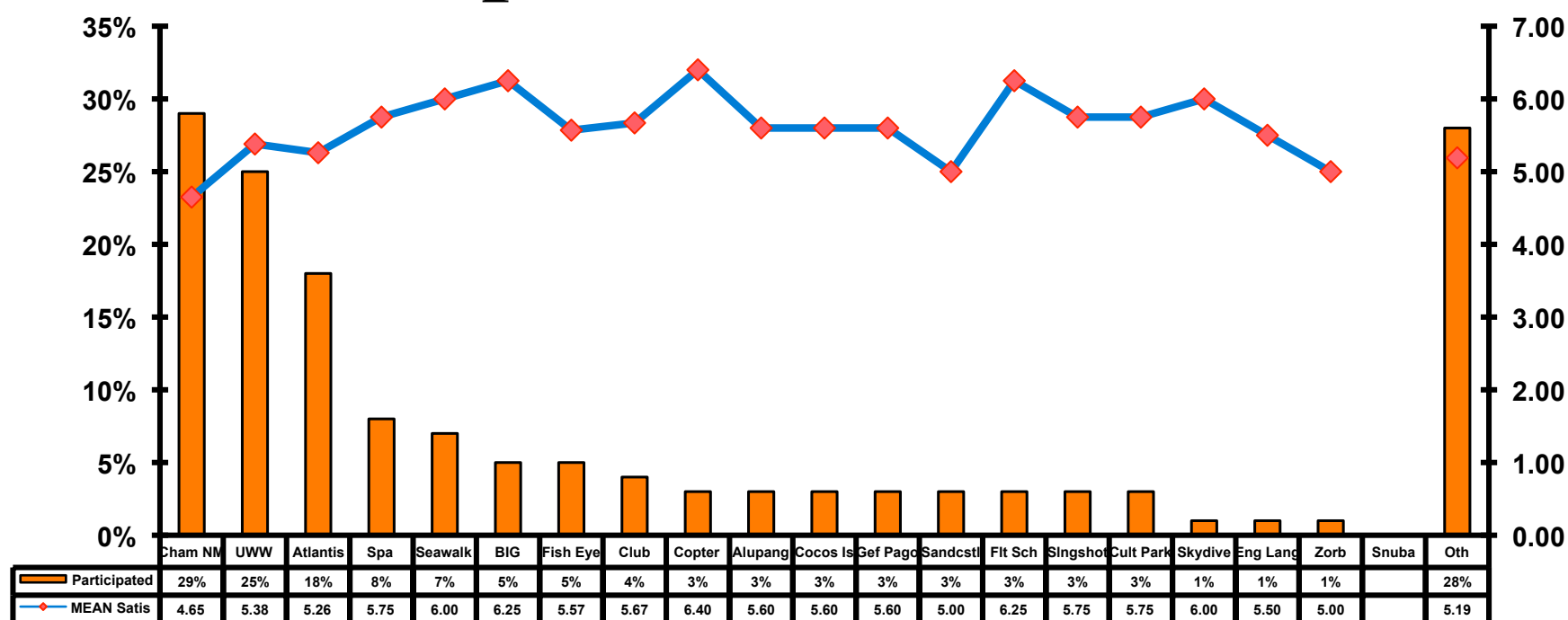
# Optional Tour Participation

- Average number of tours participated in is 2.20



# 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>39%</b>	Score of 6 to 7 = <b>26%</b>
Score of 4 to 5 = <b>55%</b>	Score of 4 to 5 = <b>40%</b>
Score 1 to 3 = <b>6%</b>	Score 1 to 3 = <b>34%</b>
<b>MEAN = 5.19</b>	<b>MEAN = 4.38</b>

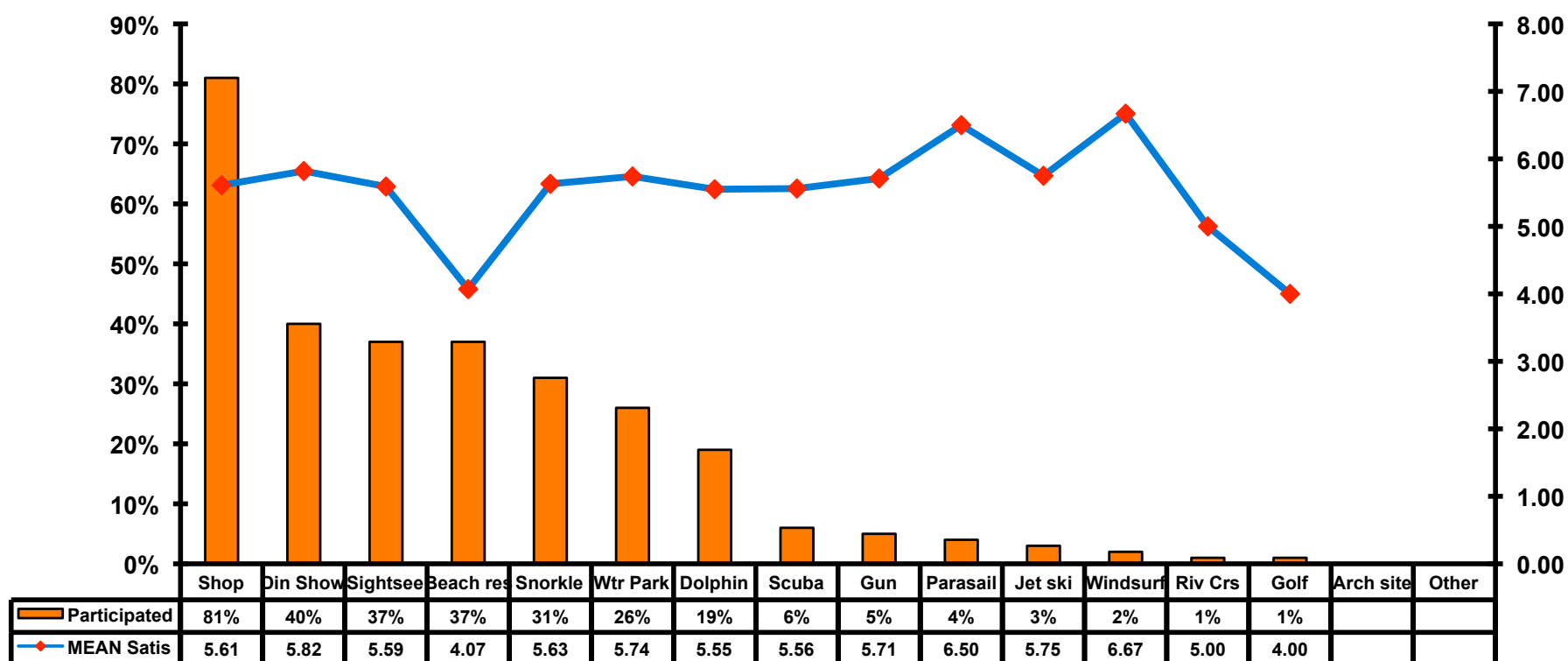
# Night Tours Satisfaction

7pt Rating Scale

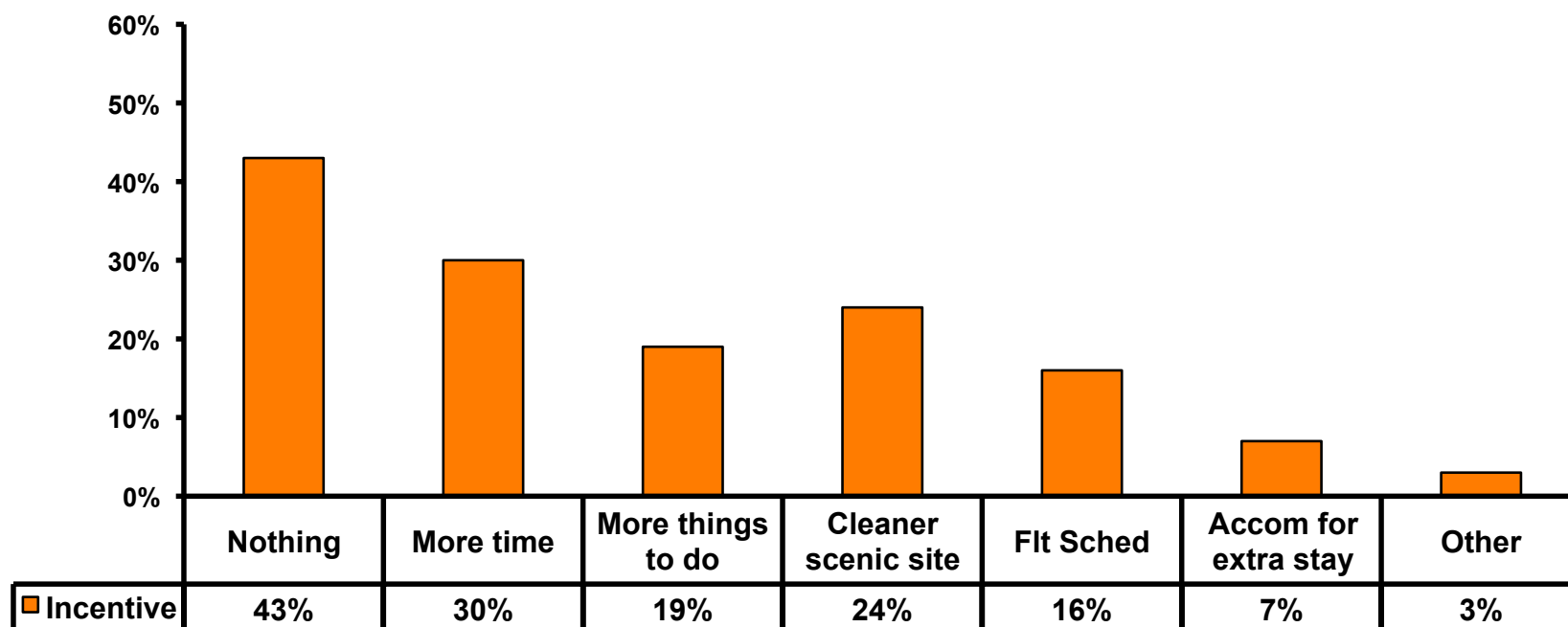
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>34%</b>	Score of 6 to 7 = <b>37%</b>
Score of 4 to 5 = <b>53%</b>	Score of 4 to 5 = <b>46%</b>
Score 1 to 3 = <b>13%</b>	Score 1 to 3 = <b>17%</b>
<b>MEAN = 4.93</b>	<b>MEAN = 4.85</b>

# Satisfaction with Other Activities



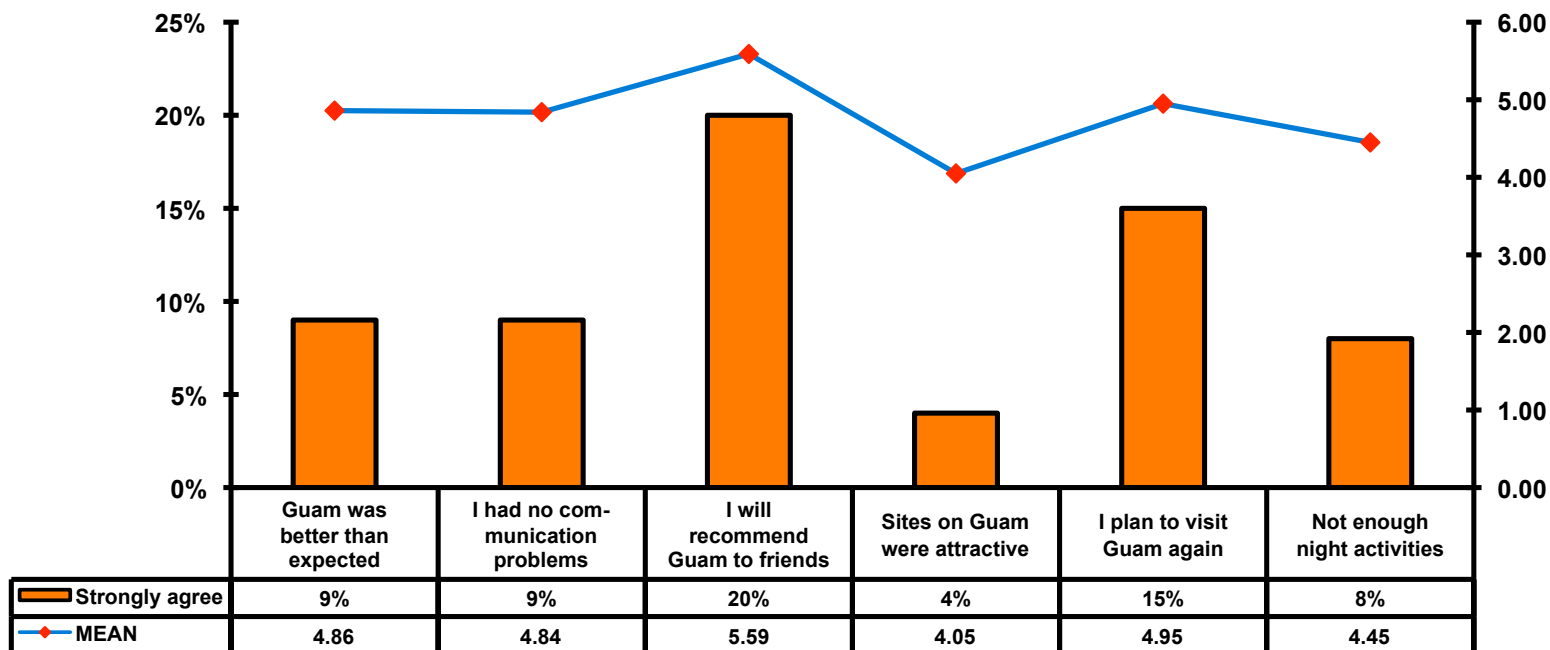
# What would it take to make Guam more enjoyable for families?



# On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

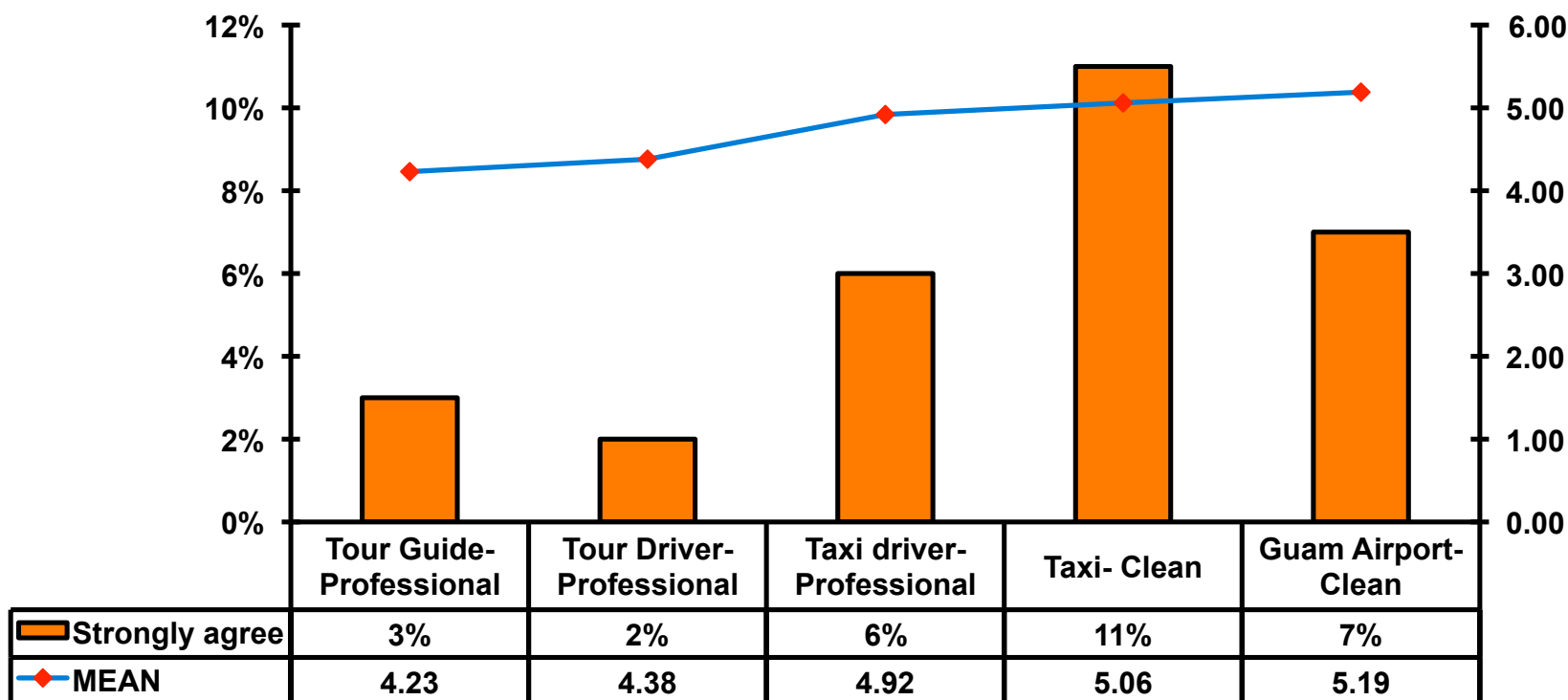




# Transportation

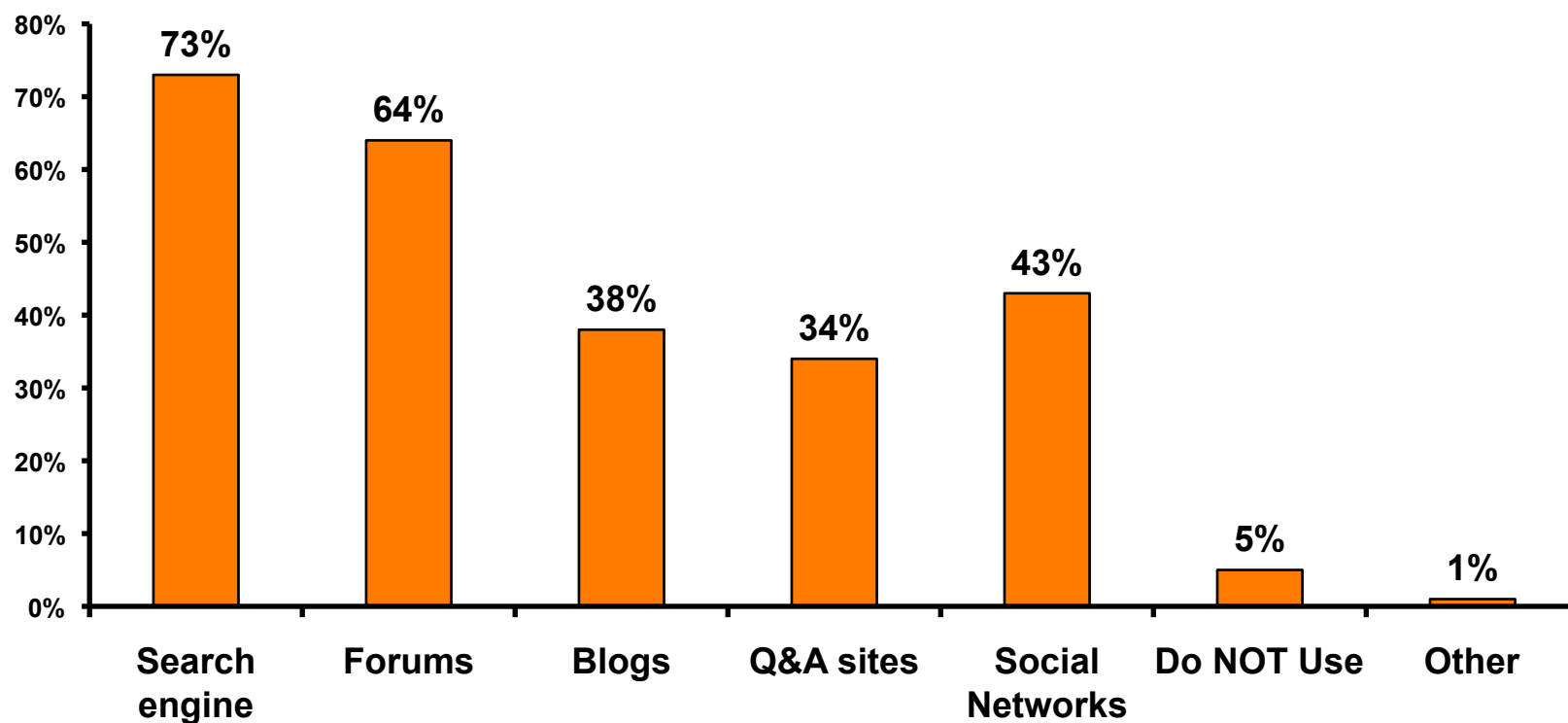
7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



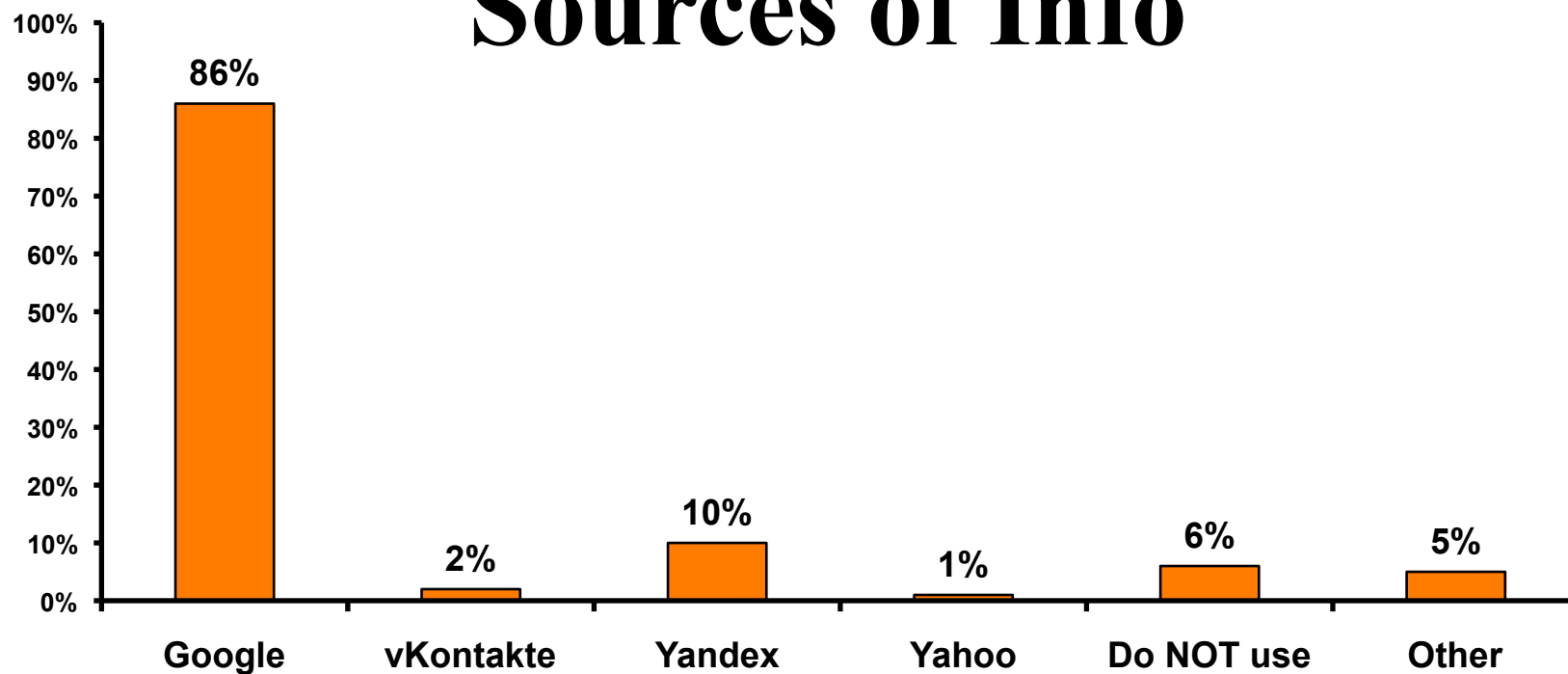
# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info

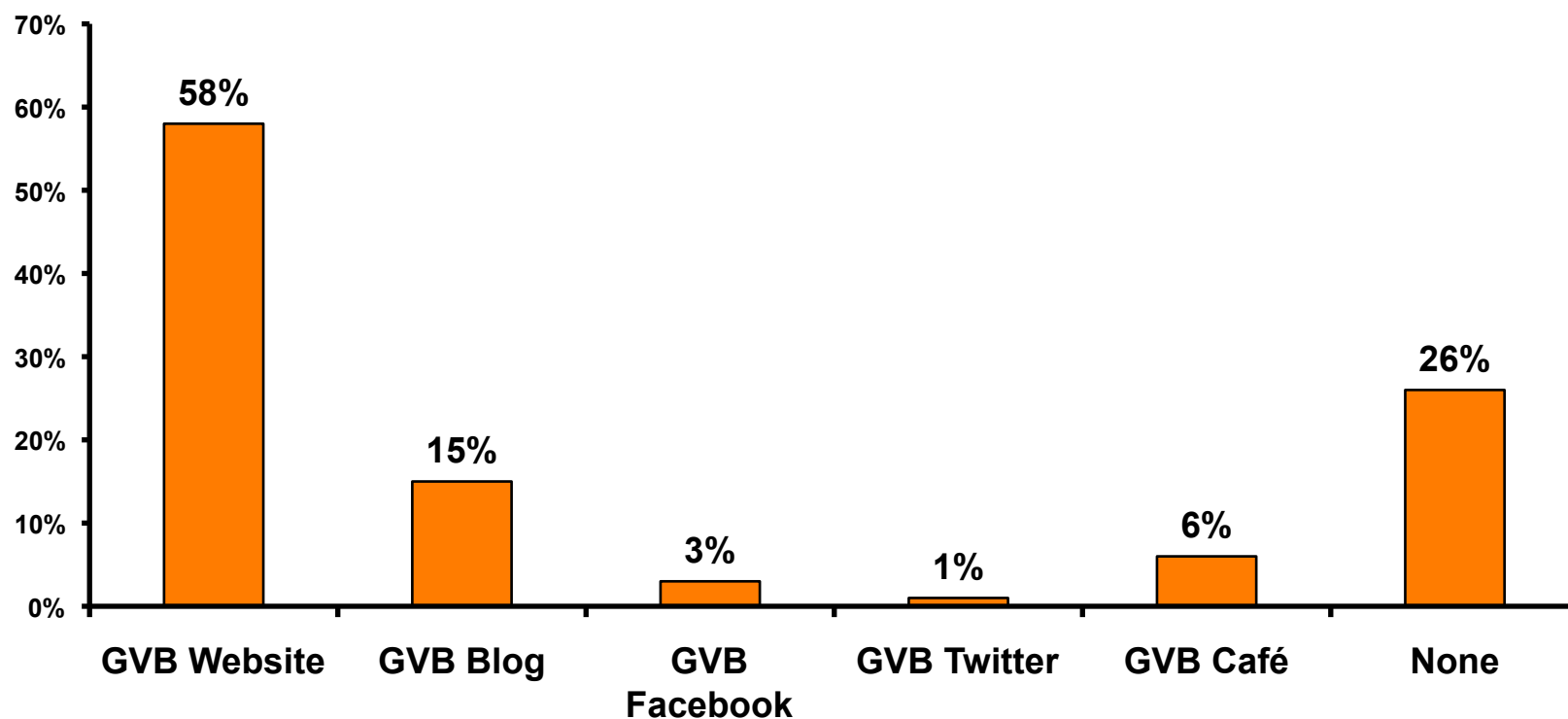


# Internet- Things To Do

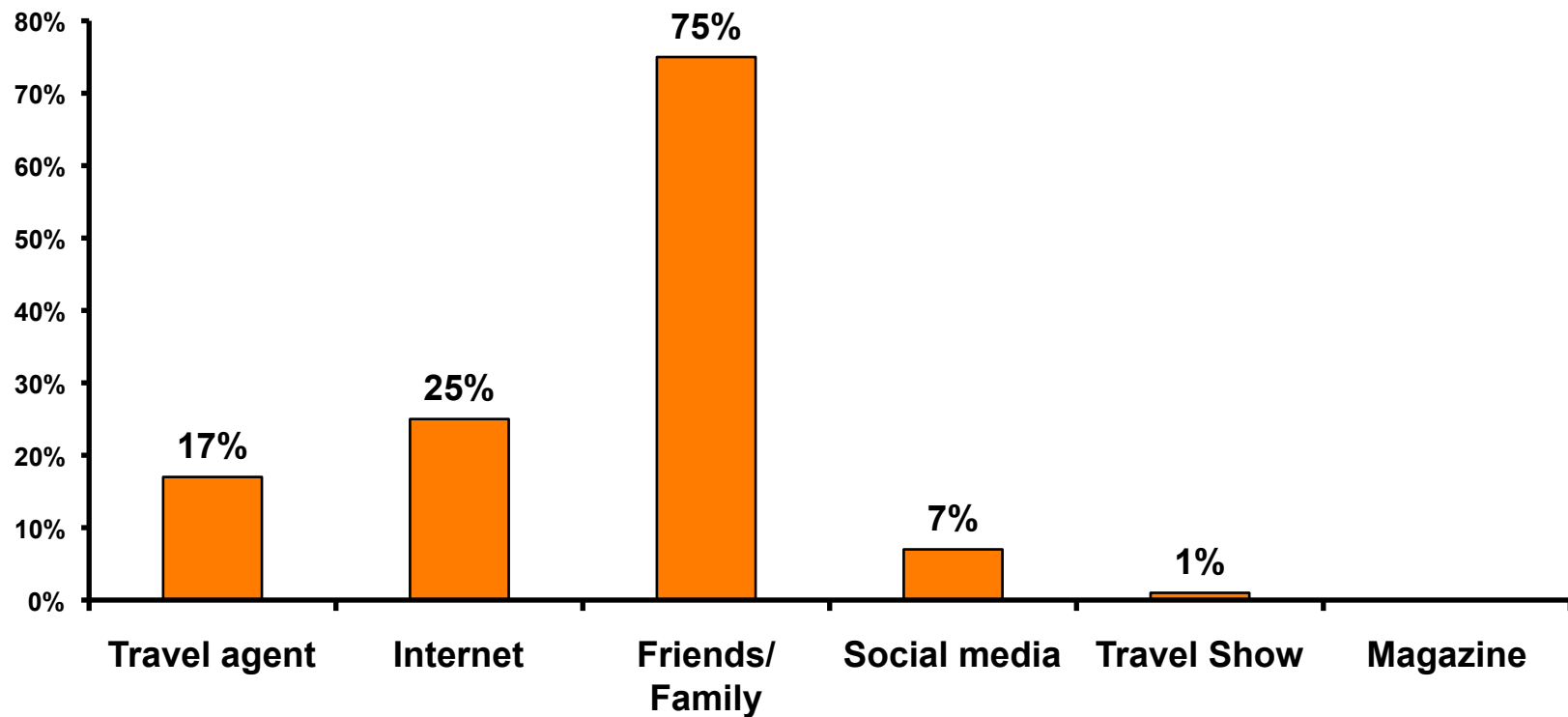
## Sources of Info



# Internet- GVB Sources

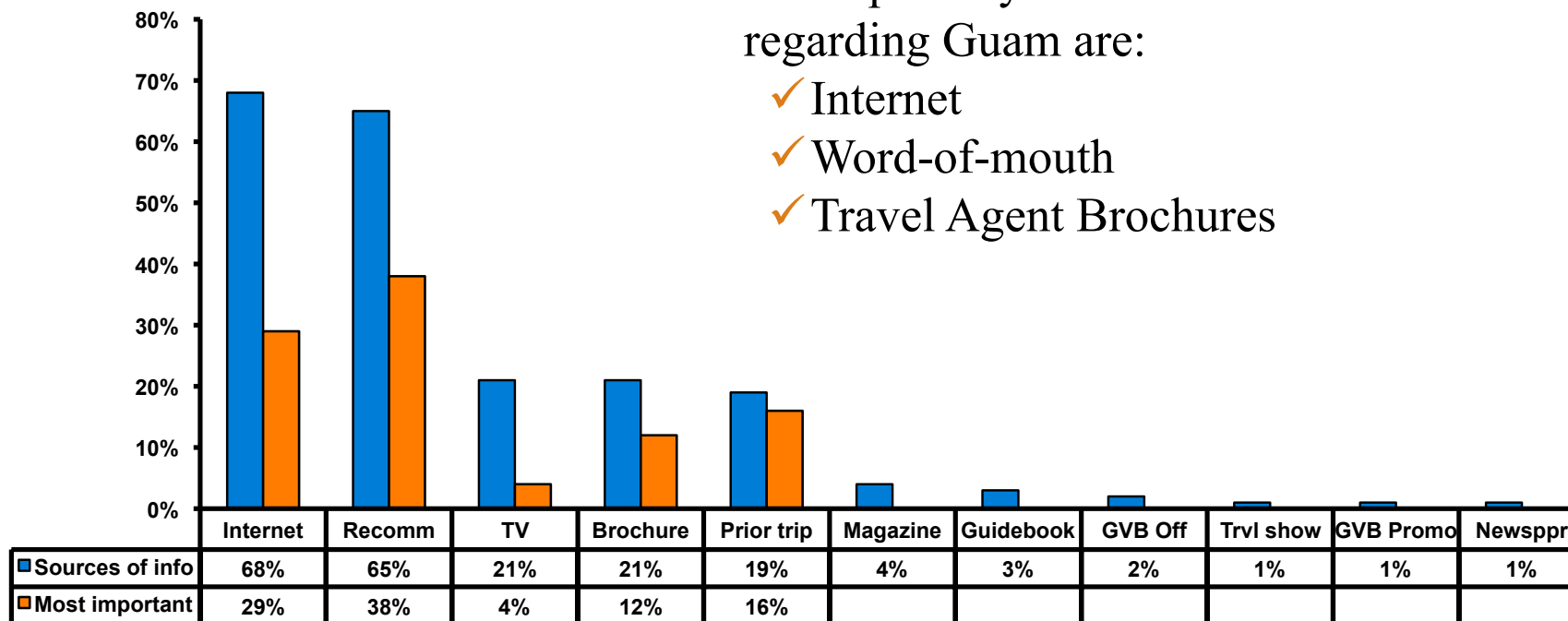


# Travel Motivation- Info Sources



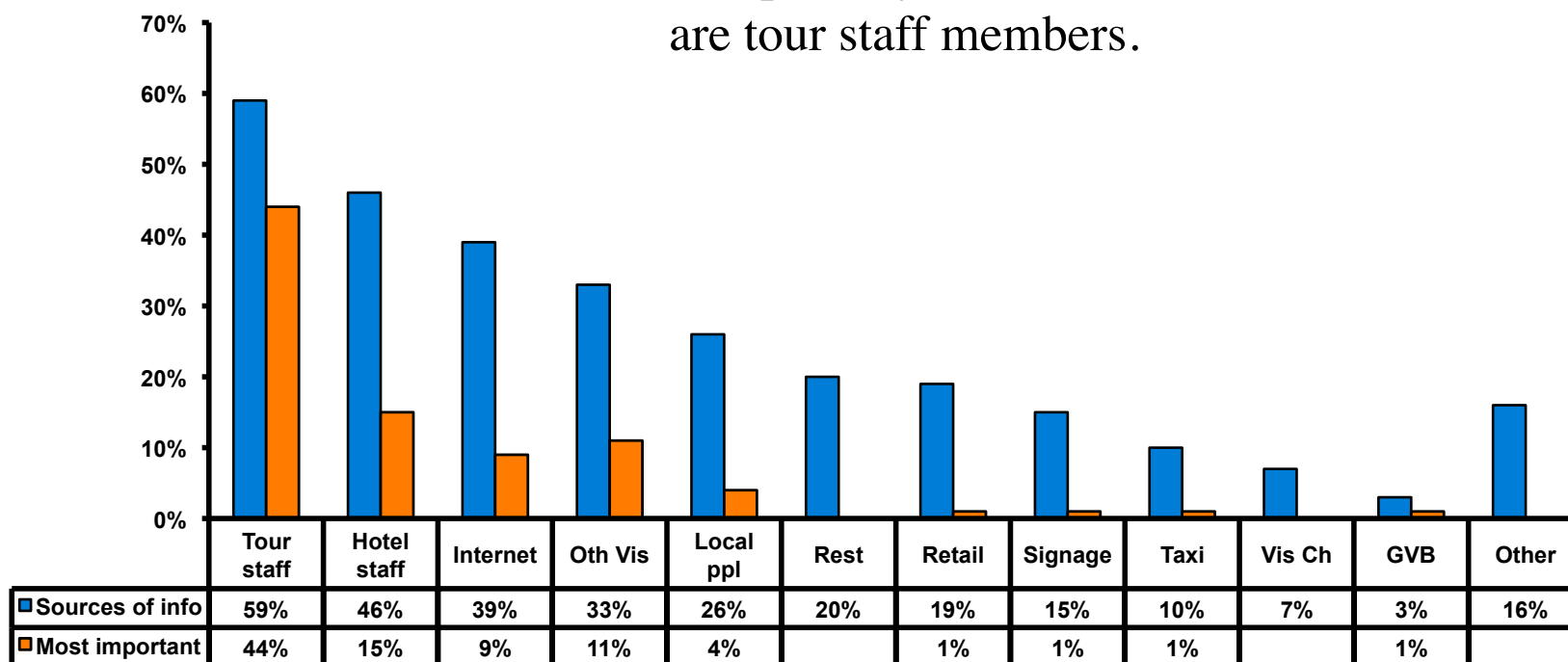
# Sources of Information Pre-arrival

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



# Sources of Information Post-arrival

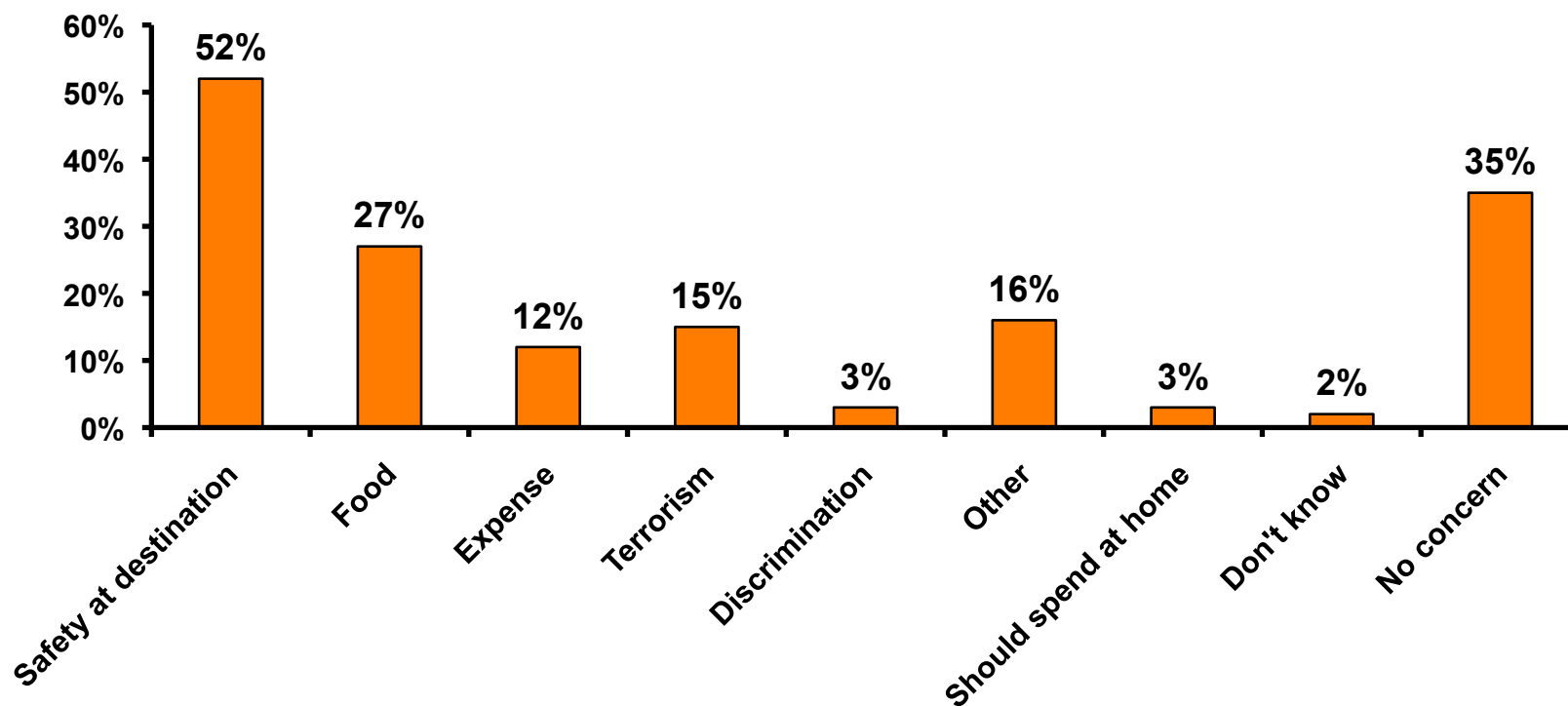
- The primary local source of information are tour staff members.





# SECTION 6 **OTHER ISSUES**

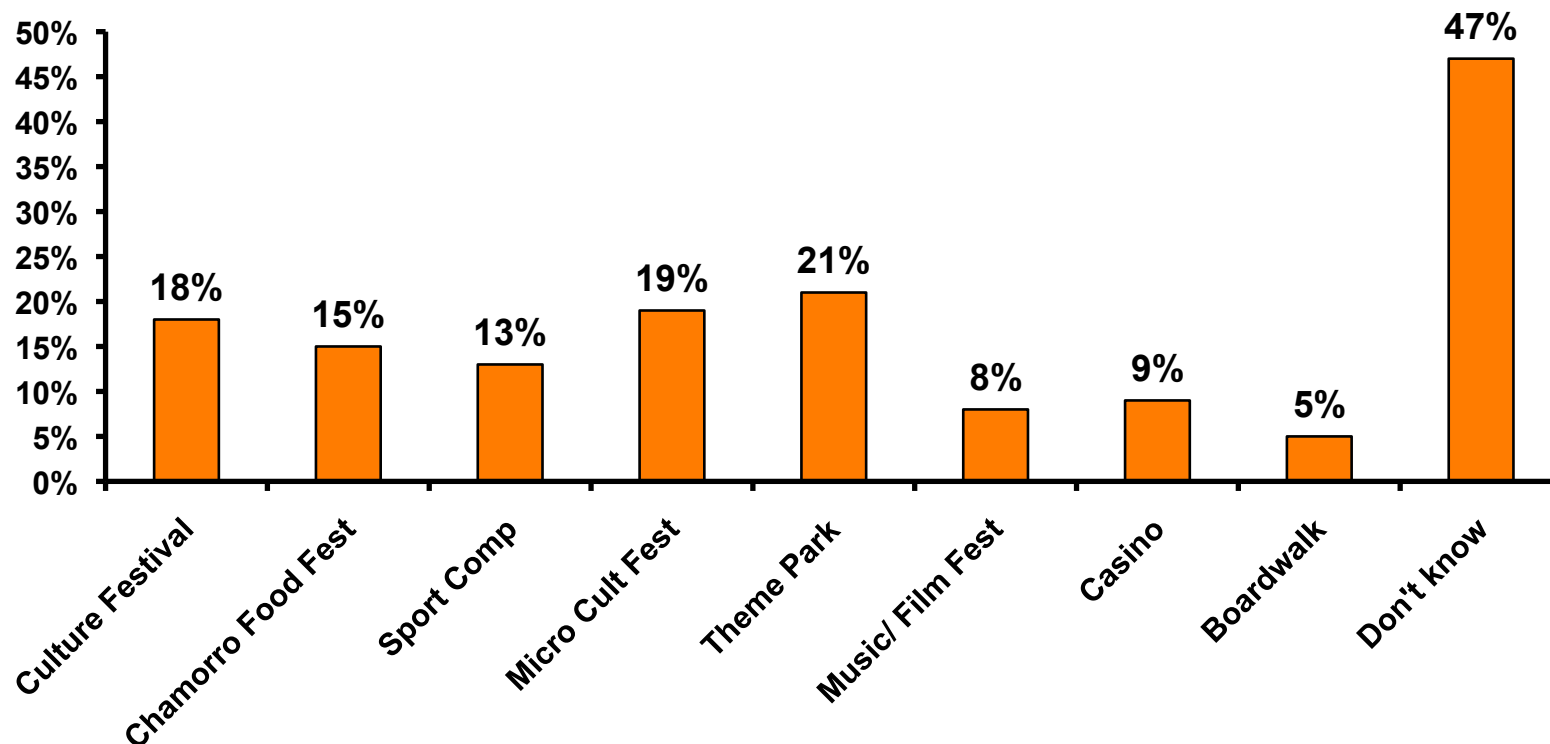
# Concerns about travel outside of Russia - Overall



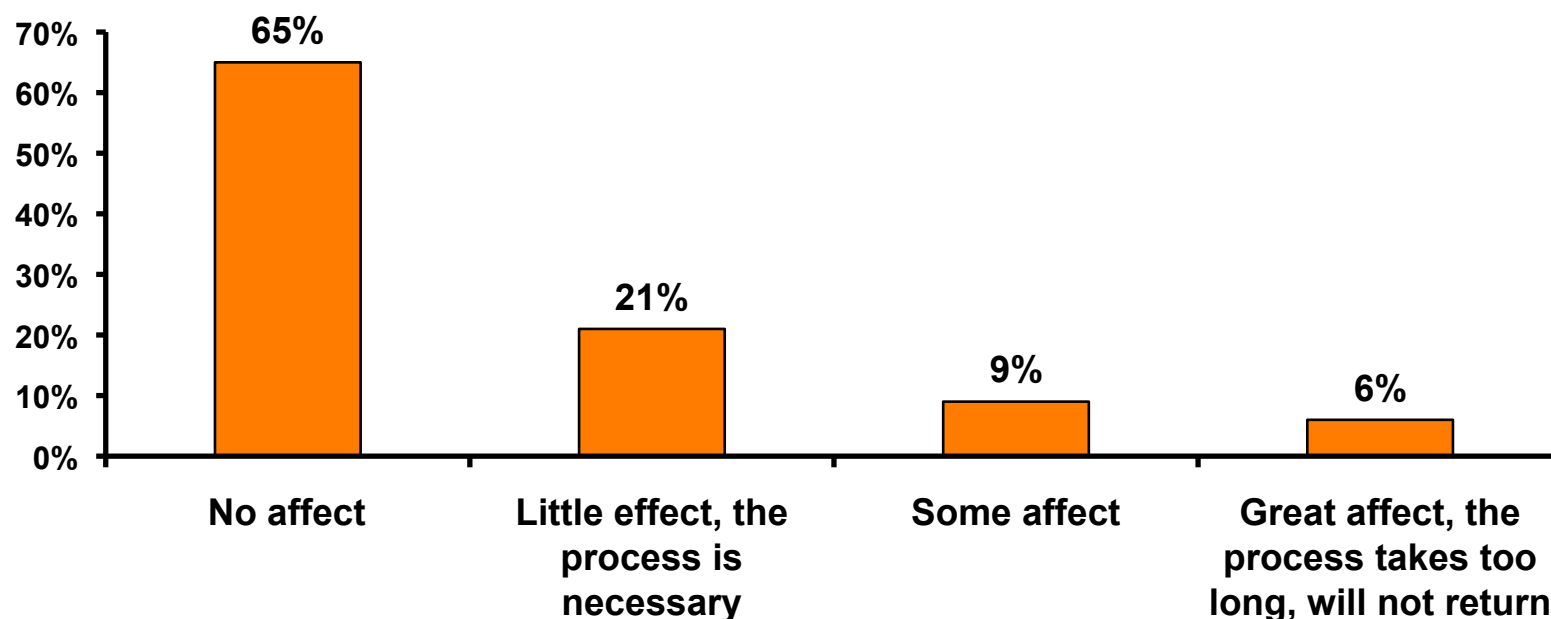
# Concerns about travel outside of Russia - By Age & Income

		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	2,263,125-3,661,606	3,661,607+	No Income
Q21	Safety	52%	43%	67%	53%	34%	52%	60%	52%	62%	44%	40%	42%	100%
	No concerns	35%	29%	25%	36%	48%	40%	33%	34%	31%	31%	40%	33%	
	Food	27%	14%	42%	22%	24%	32%	30%	24%	38%	13%	20%	33%	
	Other	16%	14%	14%	15%	21%	16%	15%	24%	23%		20%	17%	
	Terrorism	15%		17%	17%	14%	24%	15%	14%	8%	19%	20%	8%	
	Expense	12%	43%	17%	6%	14%	20%	20%	7%	15%	6%			
	Discrimination against Russians	3%	14%	3%	1%	3%		3%			6%	10%	8%	
	Should spend at home	3%		3%	4%		4%	5%			6%			
	Don't know	2%			4%						6%		8%	
	Total Count	150	7	36	78	29	25	40	29	13	16	10	12	1

# Activities/ Attractions- Appeal



# Security Screening/ Immigration Process at Guam International Airport



# Airport Arrival Experience

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

