



GUAM VISITORS BUREAU Russia Visitor Tracker Exit Profile FY2013 Data Aggregation



Prepared by: QMark Research

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Background & Methodology

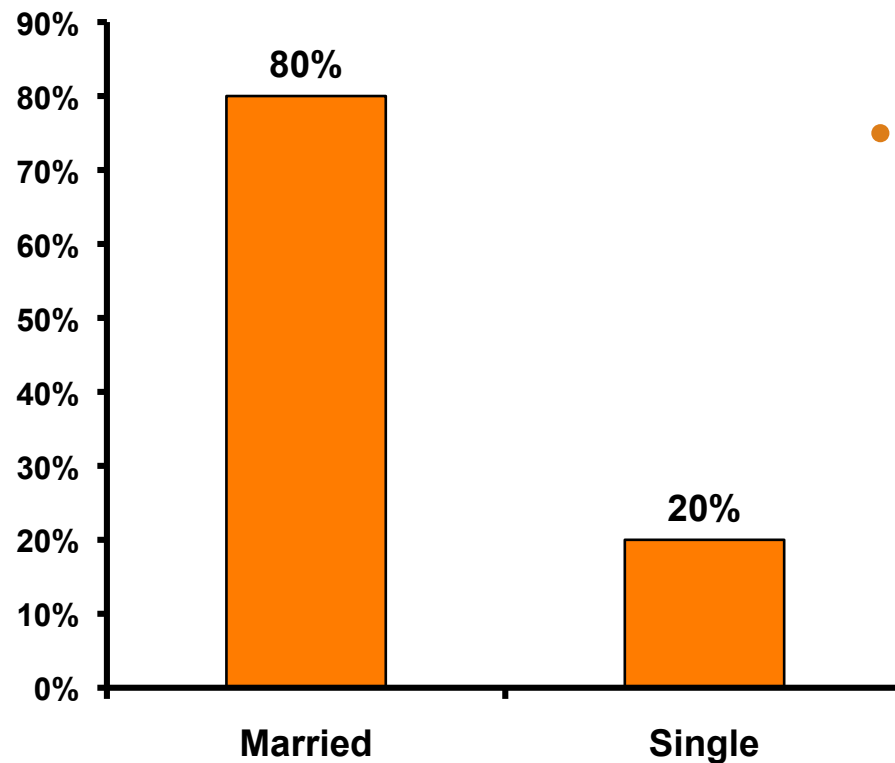
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **602** departing 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 **602** is +/- 4.00 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 +/- 4.00 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.

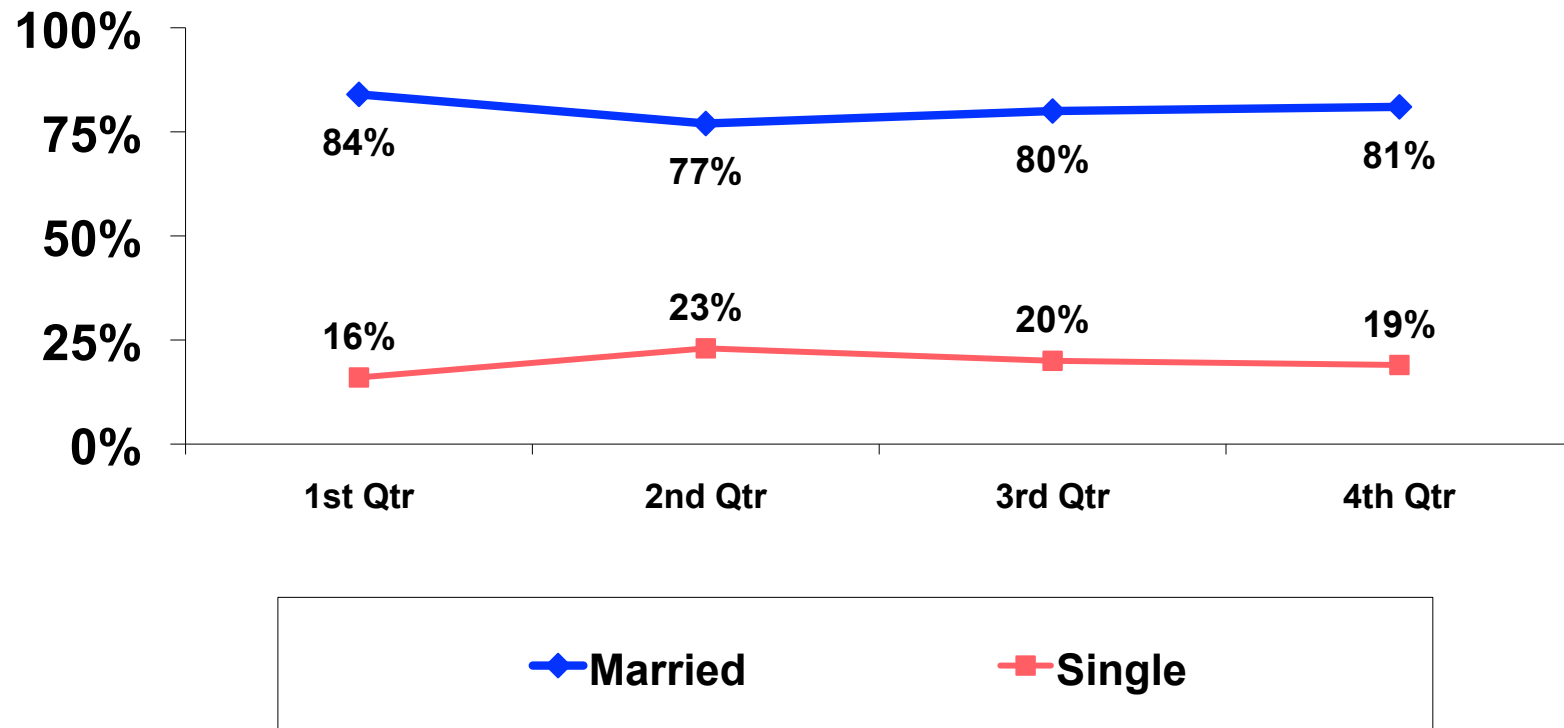
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

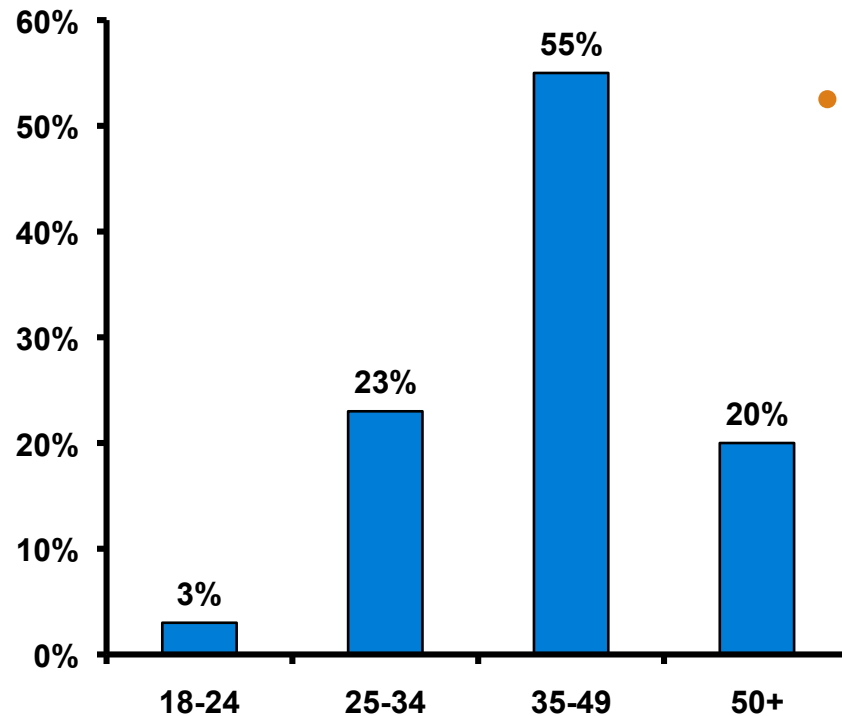


- Majority of Russian visitors are married.

Marital Status

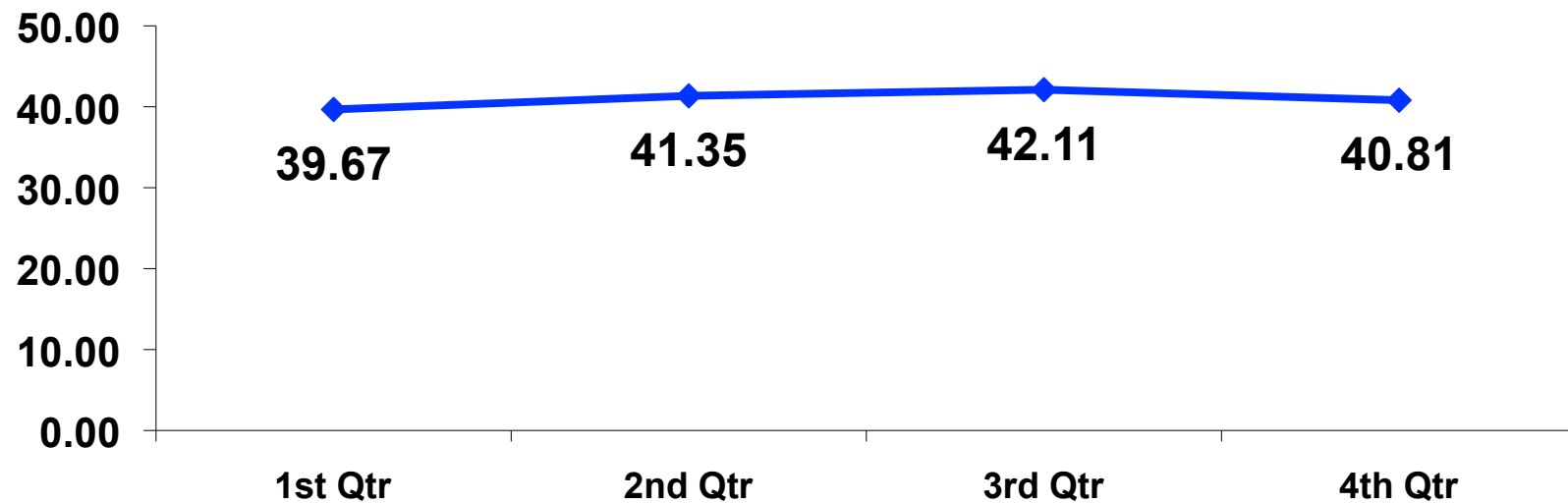


Age - Overall

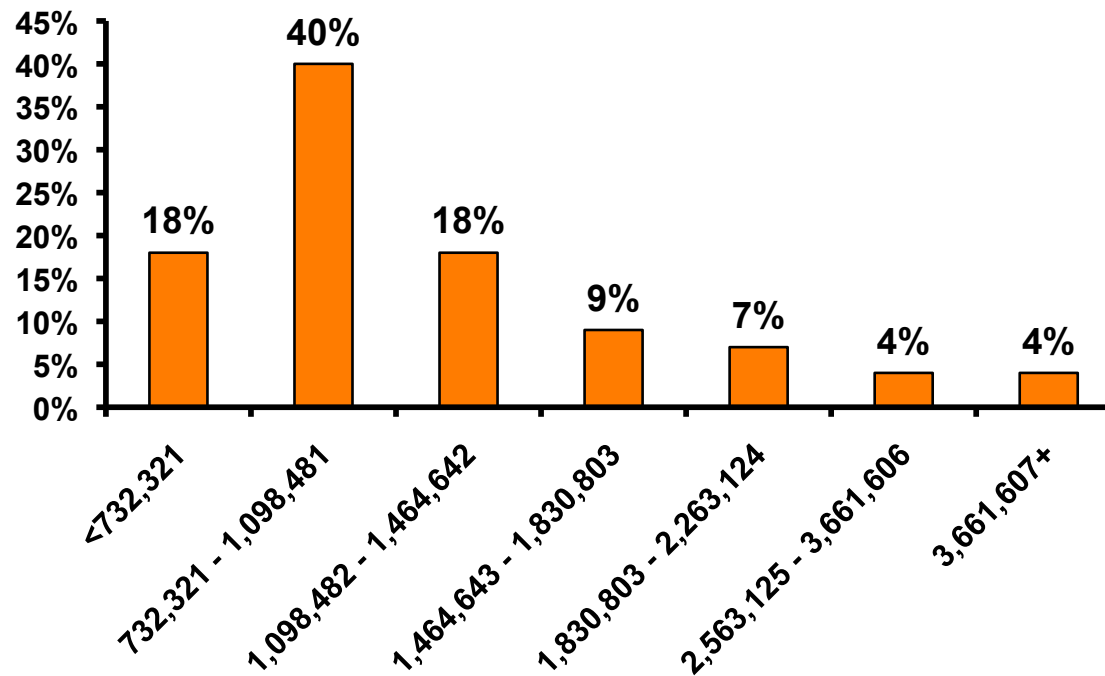


- The average age of the respondents is 40.99 years of age.

Average Age

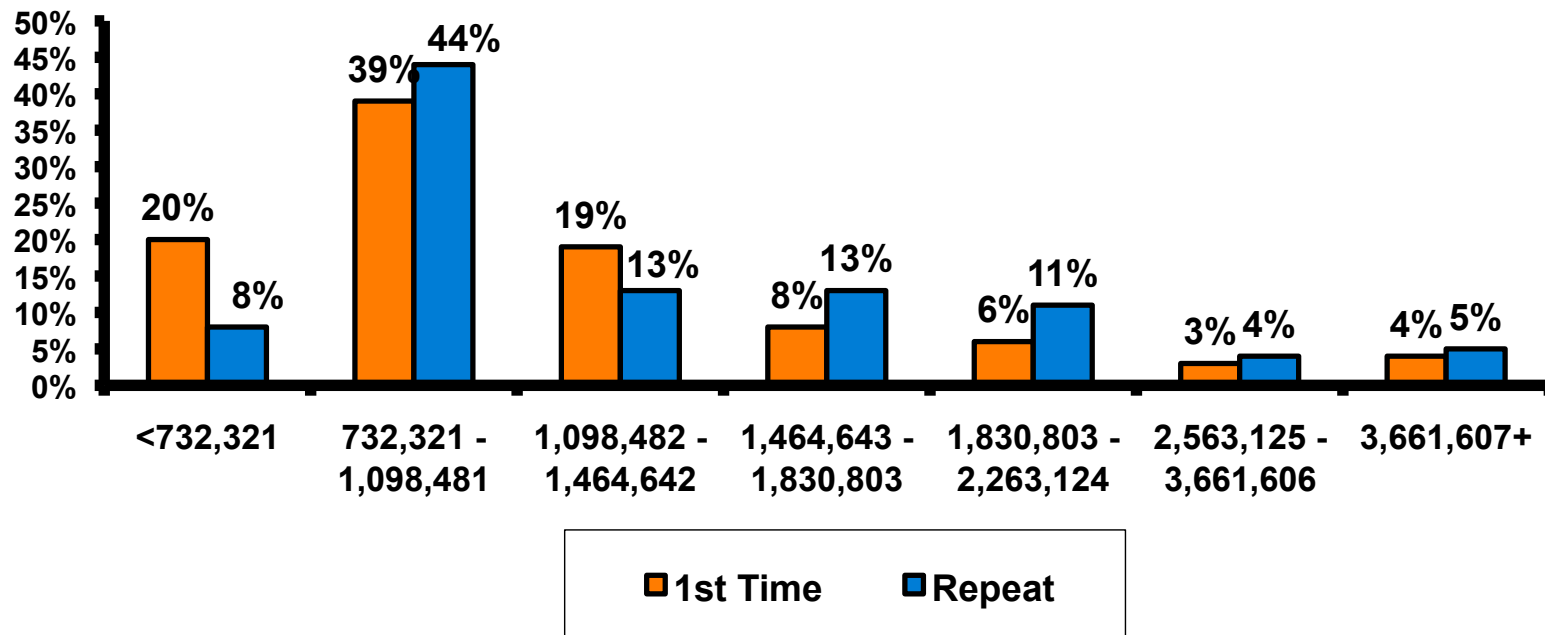


Personal Income



- Ruble Varies=
\$1

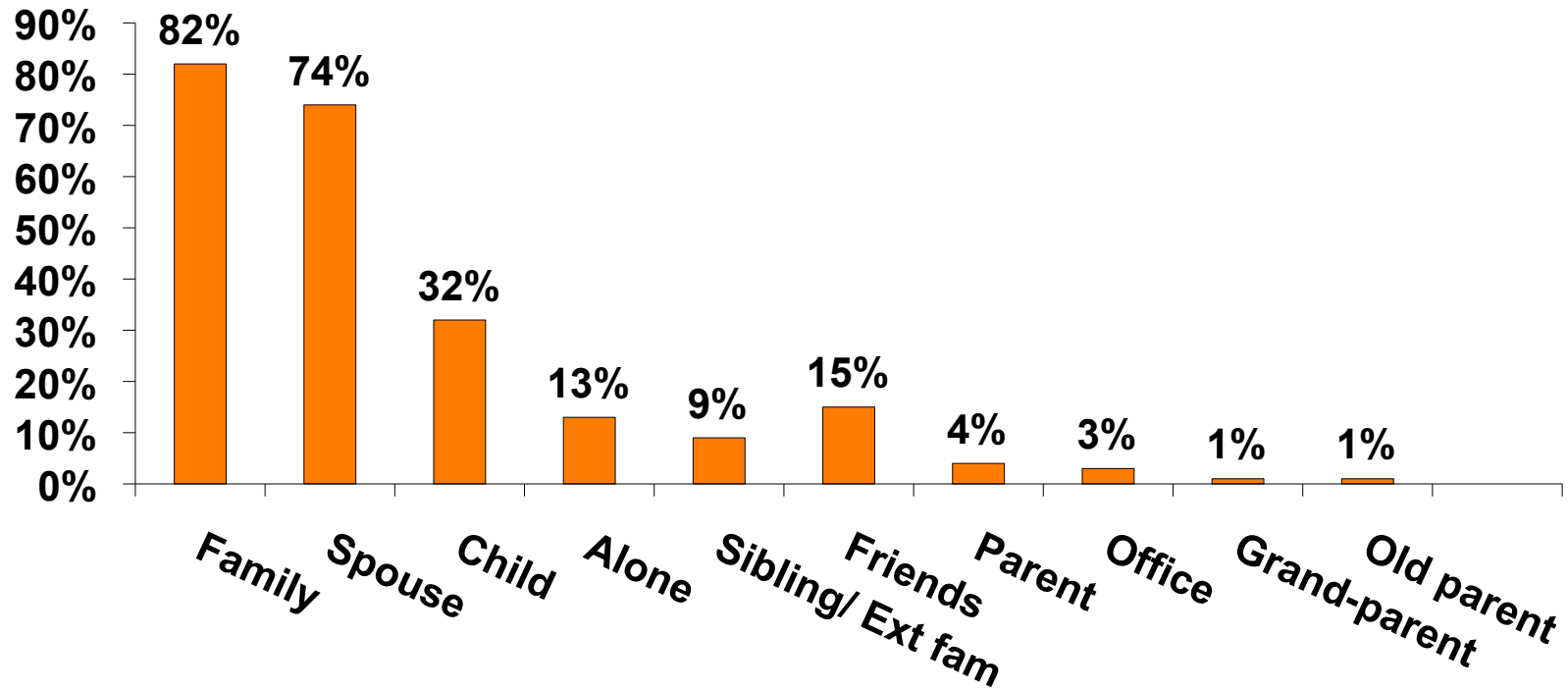
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q27	<732,321	Count	104	33	71	5	24	37	38
		Column N %	18%	11%	24%	29%	18%	12%	32%
	732,321-1,098,481	Count	236	102	134	6	50	140	37
		Column N %	40%	34%	46%	35%	38%	44%	31%
	1,098,482-1,464,642	Count	105	65	40	1	31	57	16
		Column N %	18%	22%	14%	6%	23%	18%	14%
	1,464,643-1,830,803	Count	51	35	16		7	30	13
		Column N %	9%	12%	5%		5%	9%	11%
	1,830,803-2,263,124	Count	42	28	14	2	12	24	4
		Column N %	7%	9%	5%	12%	9%	8%	3%
	2,563,125-3,661,606	Count	21	15	6		5	11	5
		Column N %	4%	5%	2%		4%	3%	4%
	3,661,607+	Count	26	16	10	1	4	16	5
		Column N %	4%	5%	3%	6%	3%	5%	4%
	No Income	Count	3	2	1	2		1	
		Column N %	1%	1%	0%	12%		0%	

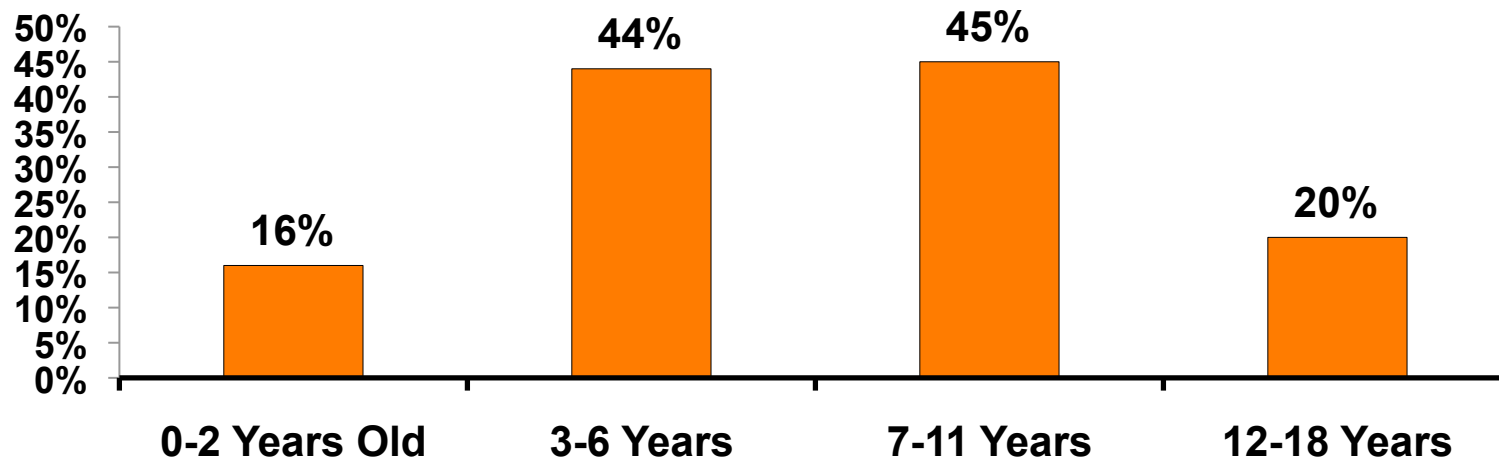
Travel Companions



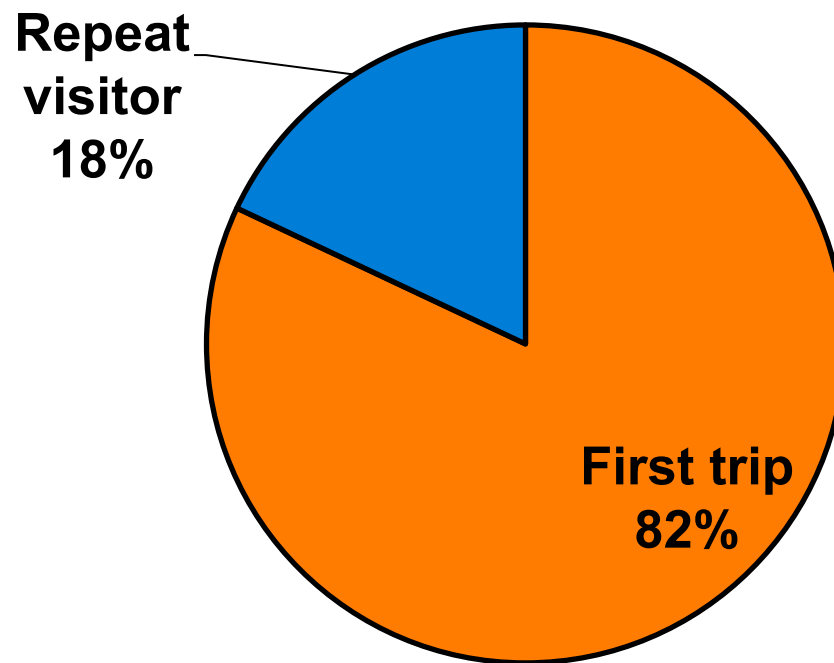
Number of Children Travel Party

N=188 total respondents traveling with children.

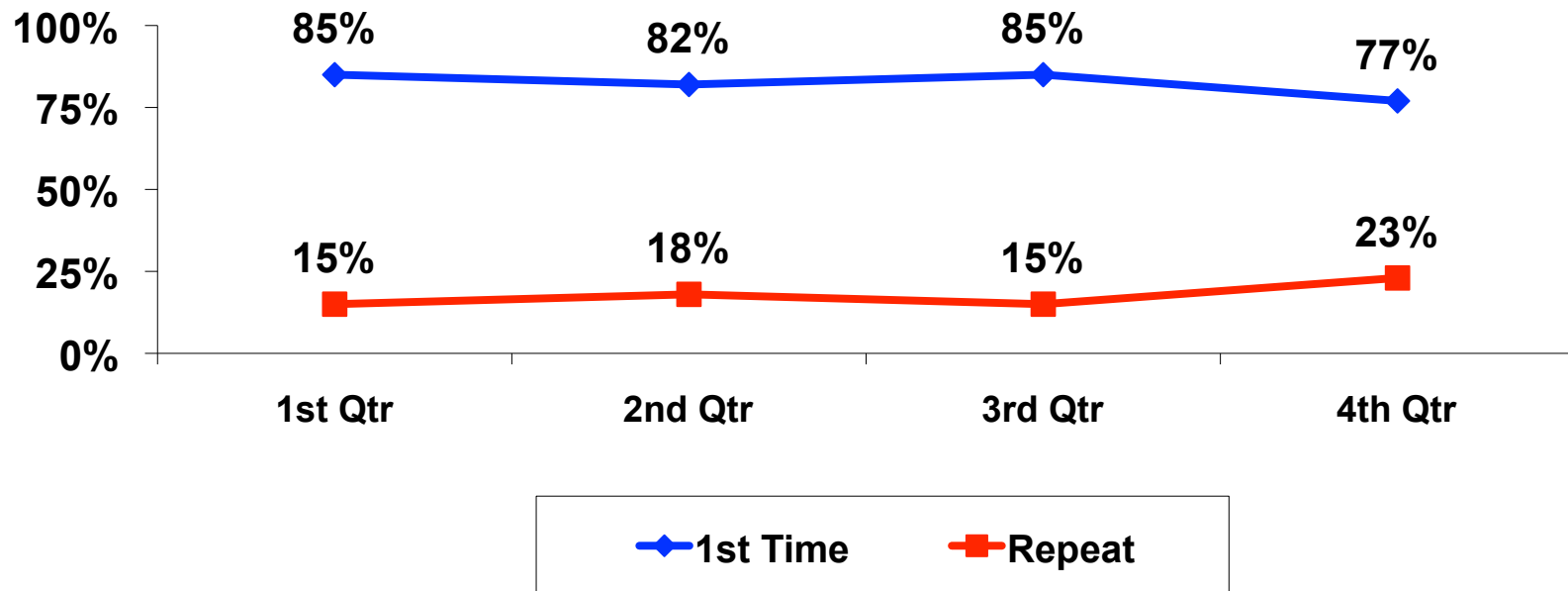
(Of those N=188 respondents, there is a total of 238 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam

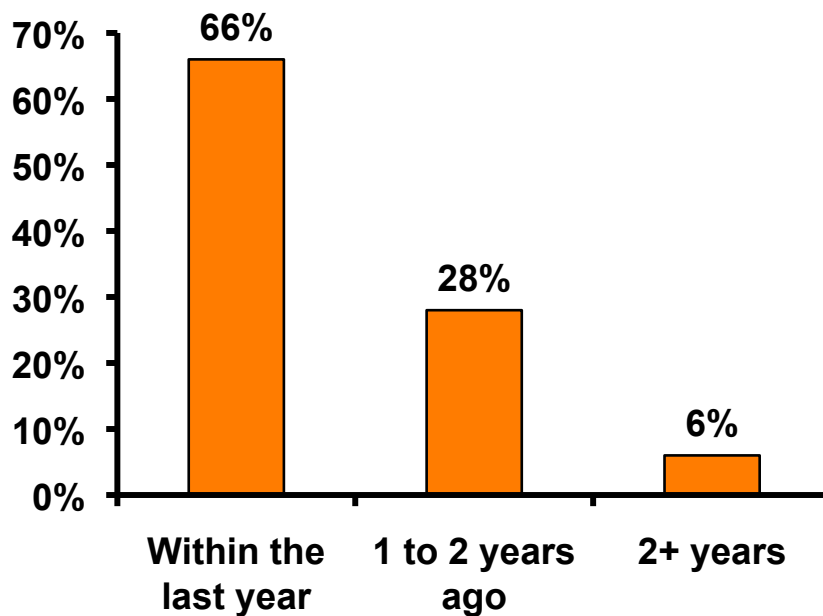


Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	304	254	50
		Column N %	50%	51%	48%
	Female	Count	298	241	55
		Column N %	50%	49%	52%
	Total	Count	602	495	105
AGE	18-24	Count	17	15	2
		Column N %	3%	3%	2%
	25-34	Count	136	105	30
		Column N %	23%	21%	29%
	35-49	Count	327	270	56
		Column N %	55%	55%	54%
	50+	Count	118	103	15
		Column N %	20%	21%	15%
	Total	Count	598	493	103

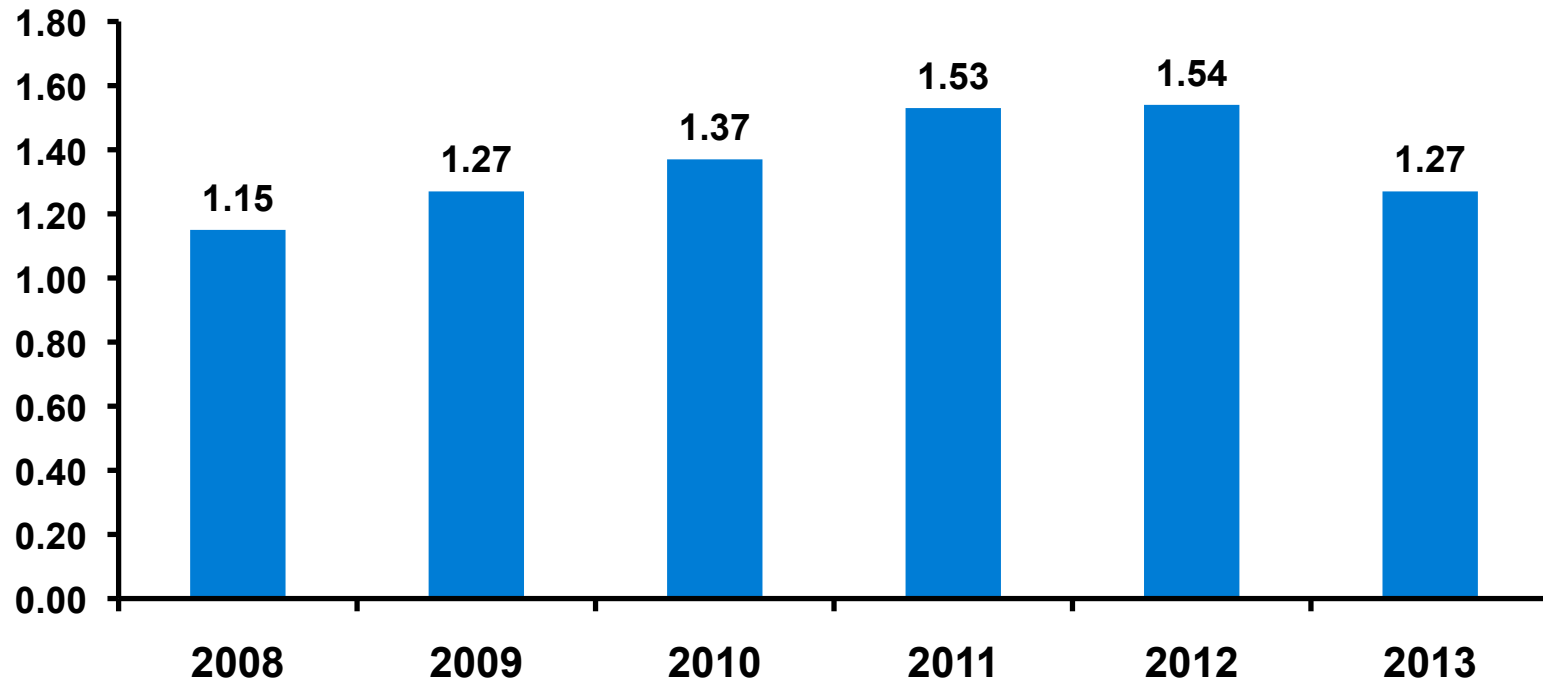
Repeat Visitors Last Trip

n = 102



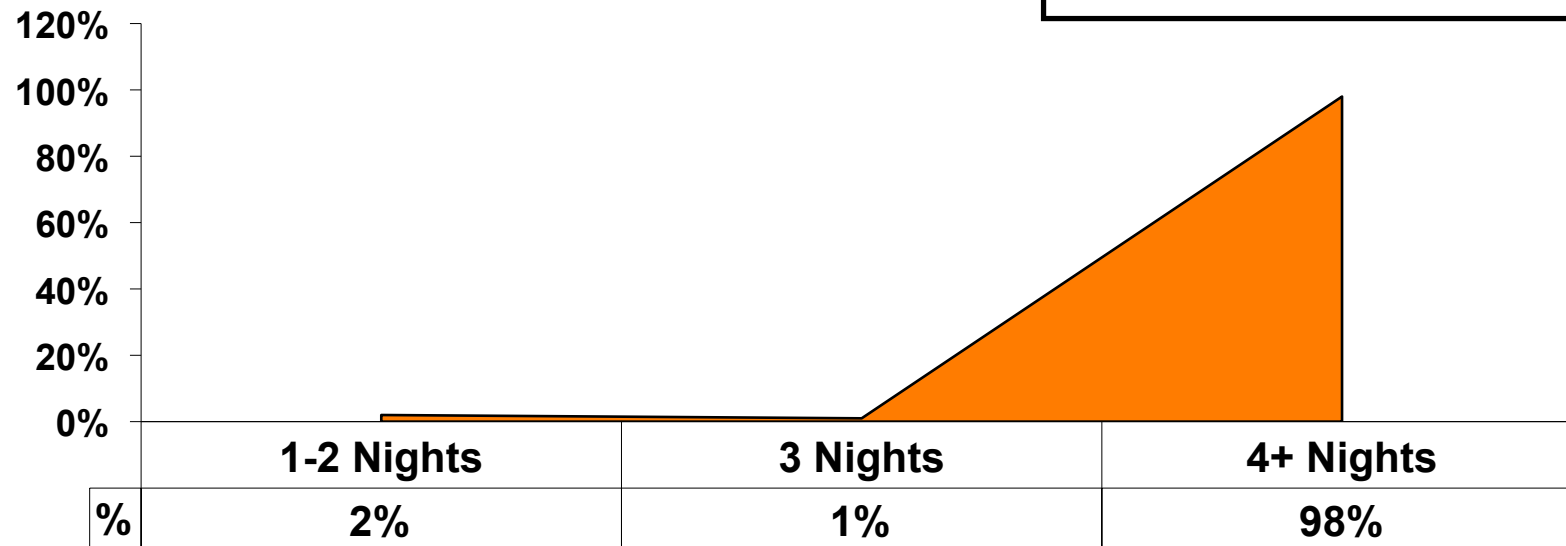
- The average repeat visitor has been to Guam 1.37 times.
- A majority of the repeat visitors have been to Guam within the last year.

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

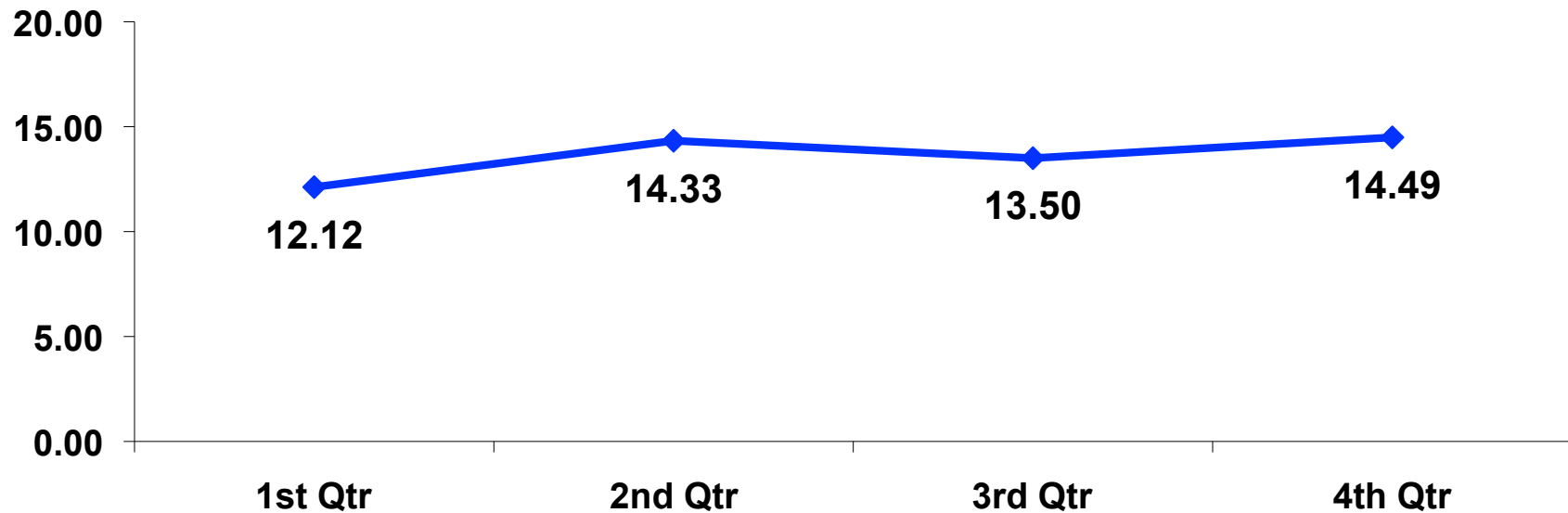


Length of Stay

Mean = 13.62 Days
Median = 14.0 Days



Average Length of Stay

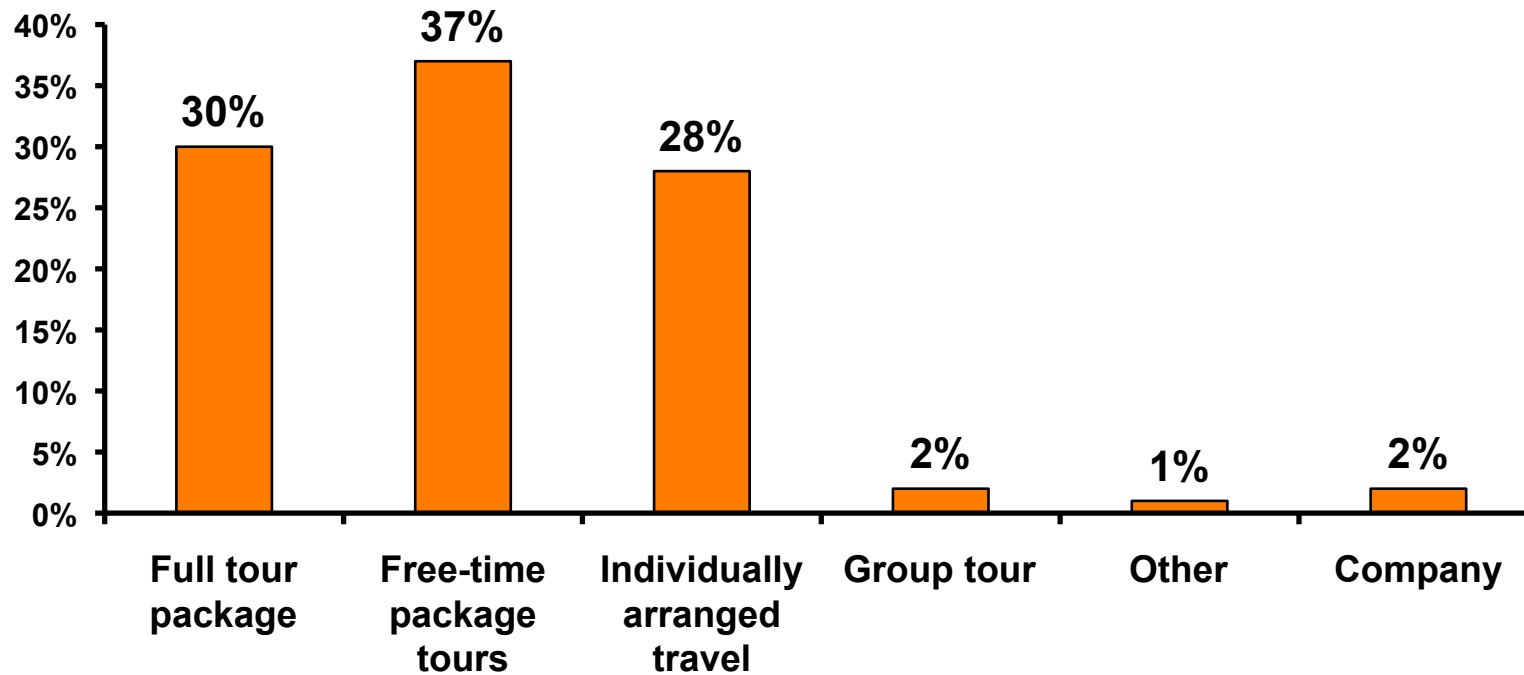


Occupation by Income

		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	2,263,125-3,661,606	3,661,607+	No Income	
Q26	Self-employed	21%	4%	3%	23%	63%	57%	71%	52%	33%	
	Professional/ Specialist	19%	5%	31%	21%	6%	5%	5%	12%		
	Company: Office/ Non-Mgr	14%	19%	24%	5%	4%					
	Company: Manager	10%	6%	10%	23%	2%	2%		8%		
	Homemaker	6%	4%	8%	5%	4%	7%	5%	4%		
	Retired	5%	26%	1%	1%						
	Company: Exec	5%	1%	2%	5%	16%	14%	14%	12%		
	Company: Engineer	5%	8%	6%	3%		7%	5%			
	Govt. Office/ Non-Mgr	4%	4%	6%	5%				4%		
	Govt. Executive	3%	2%	3%	4%	4%	2%				
	Other	2%	6%	0%	2%	2%			8%		
	Govt. Manager	2%	2%	1%	4%		5%				
	Teacher	2%	6%	1%							
	Company: Salesperson	1%	2%	2%							
	Skilled worker	1%	5%	1%							
	Student	1%	1%							67%	
	Unemployed	0%	1%								
	Total	Count	597	104	235	104	51	42	21	25	3

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

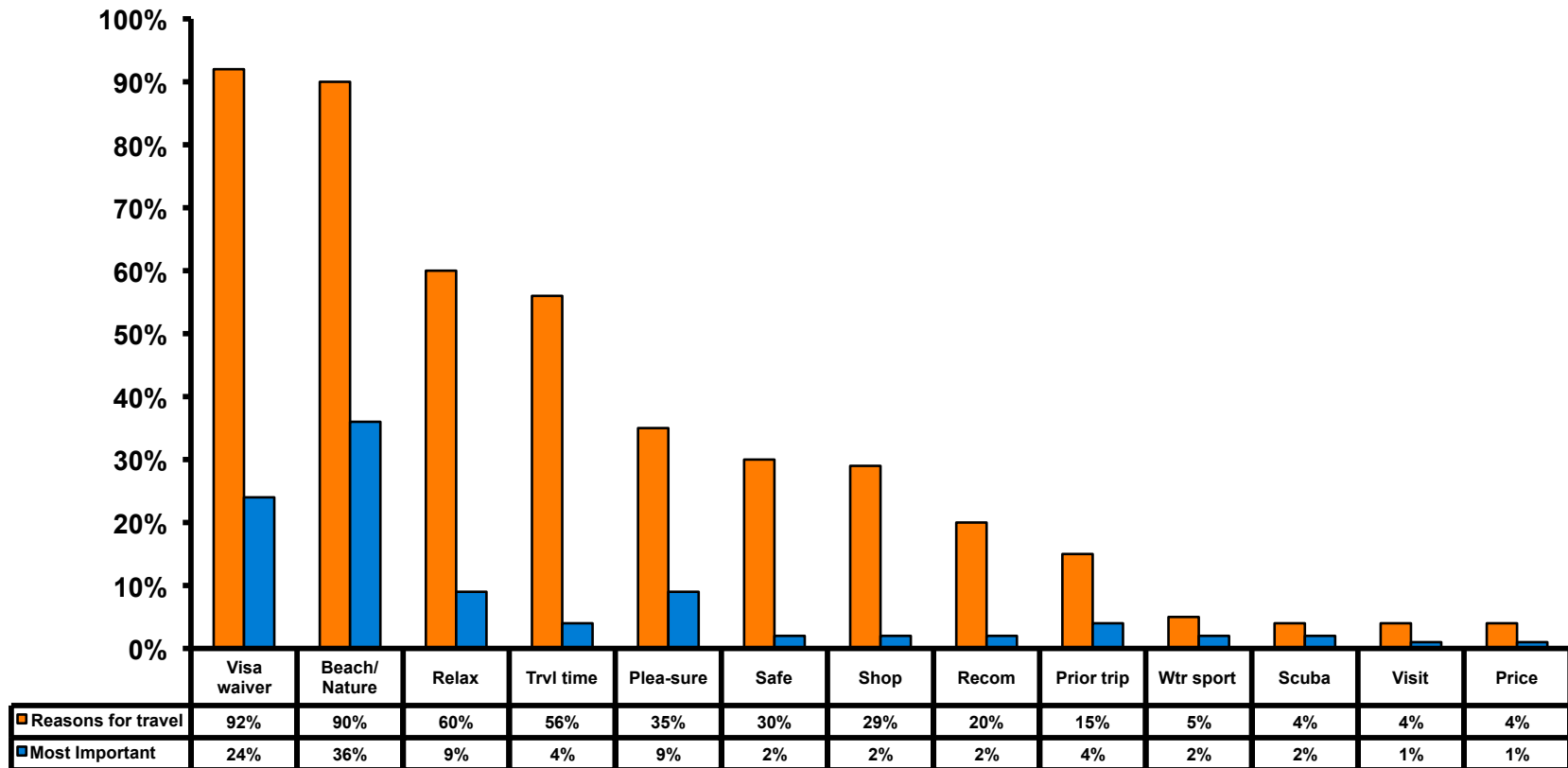


Accommodation by Income

Average length of stay: 13.62 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										
PIC Club	24%	28%	24%	20%	18%	19%	29%	23%		
Hilton Guam Resort	14%	9%	12%	21%	22%	21%	5%	4%		
Fiesta Resort Guam	13%	23%	12%	11%	12%	5%		15%		
Hyatt Regency Guam	11%	5%	8%	14%	24%	17%	10%	23%	33%	
Westin Resort Guam	11%	6%	8%	9%	18%	24%	33%	27%		
Holiday Resort Guam	7%	5%	10%	9%	2%	5%			33%	
Guam Aurora Resort	6%	7%	6%	4%	6%	7%	5%	8%		
Oceanview Hotel	2%	3%	4%	1%					33%	
Guam Marriott Resort	2%	3%	3%	2%		2%	5%			
Onward Beach Resort	2%		3%	2%			10%			
Outrigger Guam Resort	2%		5%							
Bayview Hotel	2%	3%	2%	1%						
Grand Plaza Hotel	1%	4%	1%	1%						
Other	1%		1%	1%						
Sheraton Laguna Guam	1%	2%		2%						
Tumon Bay Capital Hotel	1%	2%		1%						
Verona Resort & Spa	0%		0%							
Home stay/ friend/ relative	0%	1%					5%			
Apartment	0%		1%							
Pacific Bay Hotel	0%		0%							
Hotel Santa Fe	0%		0%							
Condo	0%	1%								
Royal Orchid Guam	0%			1%						
Guam Plaza Hotel	0%		0%							
Guam Reef & Olive Spa	0%			1%						
Total	Count	600	104	235	105	51	42	21	26	3

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	No Visa required	92%	82%	89%	94%	90%	92%	91%	
	Natural beauty	90%	82%	87%	90%	95%	89%	91%	
	Relax	60%	47%	53%	61%	68%	59%	61%	
	Short travel time	56%	24%	55%	60%	49%	53%	58%	
	Pleasure	35%	47%	30%	38%	30%	36%	34%	
	Safe	30%	29%	24%	31%	36%	32%	28%	
	Shopping	29%	35%	29%	30%	25%	25%	33%	
	Recomm- friend/family/trvl agnt	20%	41%	16%	20%	20%	20%	19%	
	Previous trip	15%	12%	19%	16%	10%	15%	15%	
	Water sports	5%		7%	5%	3%	5%	4%	
	Scuba	4%	6%	7%	4%		5%	3%	
	Visit friends/ Relatives	4%	12%	5%	3%	3%	3%	4%	
	Price	4%		3%	4%	3%	4%	3%	
	Other	3%	6%	4%	2%	3%	3%	2%	
	Organized sports	2%		4%	2%	1%	3%	1%	
	Company Sponsored	2%		4%	2%	2%	3%	1%	
	Company/ Business Trip	2%		2%	2%	3%	2%	2%	
	Honeymoon	1%	6%			2%	1%	0%	
	Married/ Attn wedding	0%		1%	0%		1%		
	Total	Count	600	17	135	327	117	303	297

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	No Visa required	92%	95%	95%	89%	94%	83%	90%	81%	33%
	Natural beauty	90%	94%	91%	90%	92%	81%	71%	88%	67%
	Relax	60%	60%	62%	63%	57%	45%	67%	58%	67%
	Short travel time	56%	55%	55%	57%	61%	55%	67%	54%	33%
	Pleasure	35%	30%	29%	37%	49%	43%	38%	50%	33%
	Safe	30%	25%	25%	31%	47%	33%	43%	50%	33%
	Shopping	29%	25%	36%	25%	25%	26%	19%	35%	
	Recomm- friend/family/trvl agnt	20%	28%	16%	16%	22%	21%	24%	27%	
	Previous trip	15%	7%	16%	11%	24%	24%	19%	15%	33%
	Water sports	5%	2%	4%	9%	6%	7%	5%	8%	
	Scuba	4%	4%	3%	7%	2%	7%	10%		
	Visit friends/ Relatives	4%	7%	1%	3%	2%	5%	5%	15%	
	Price	4%	5%	5%	3%	4%				
	Other	3%	4%	2%	4%	2%				
	Organized sports	2%	1%	1%	5%	4%	2%	5%		
	Company Sponsored	2%	3%	3%	2%	2%				
	Company/ Business Trip	2%	3%	2%	2%				8%	
	Honeymoon	1%	1%	1%						
	Married/ Attn wedding	0%		1%						
	Total Count	600	104	235	105	51	42	21	26	3

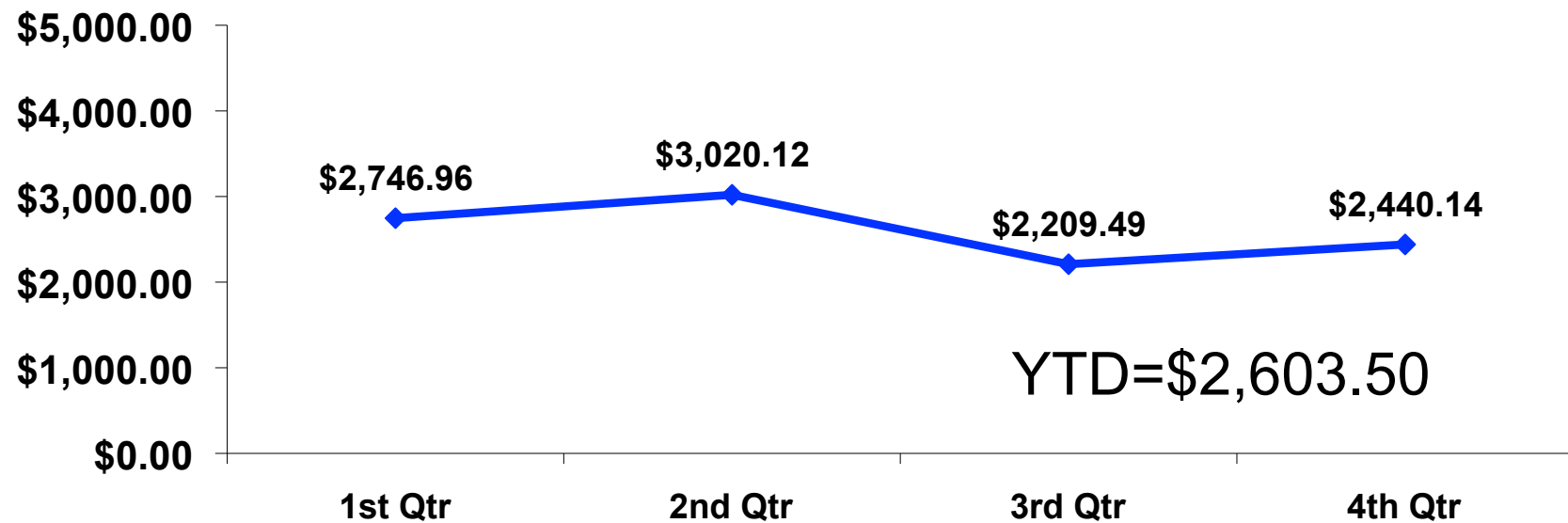
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

Ruble Varies /US\$1

- \$5,626.62 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$19,853 = maximum (highest amount recorded for the entire sample)
- \$2,603.50 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

Rub Varies=\$1

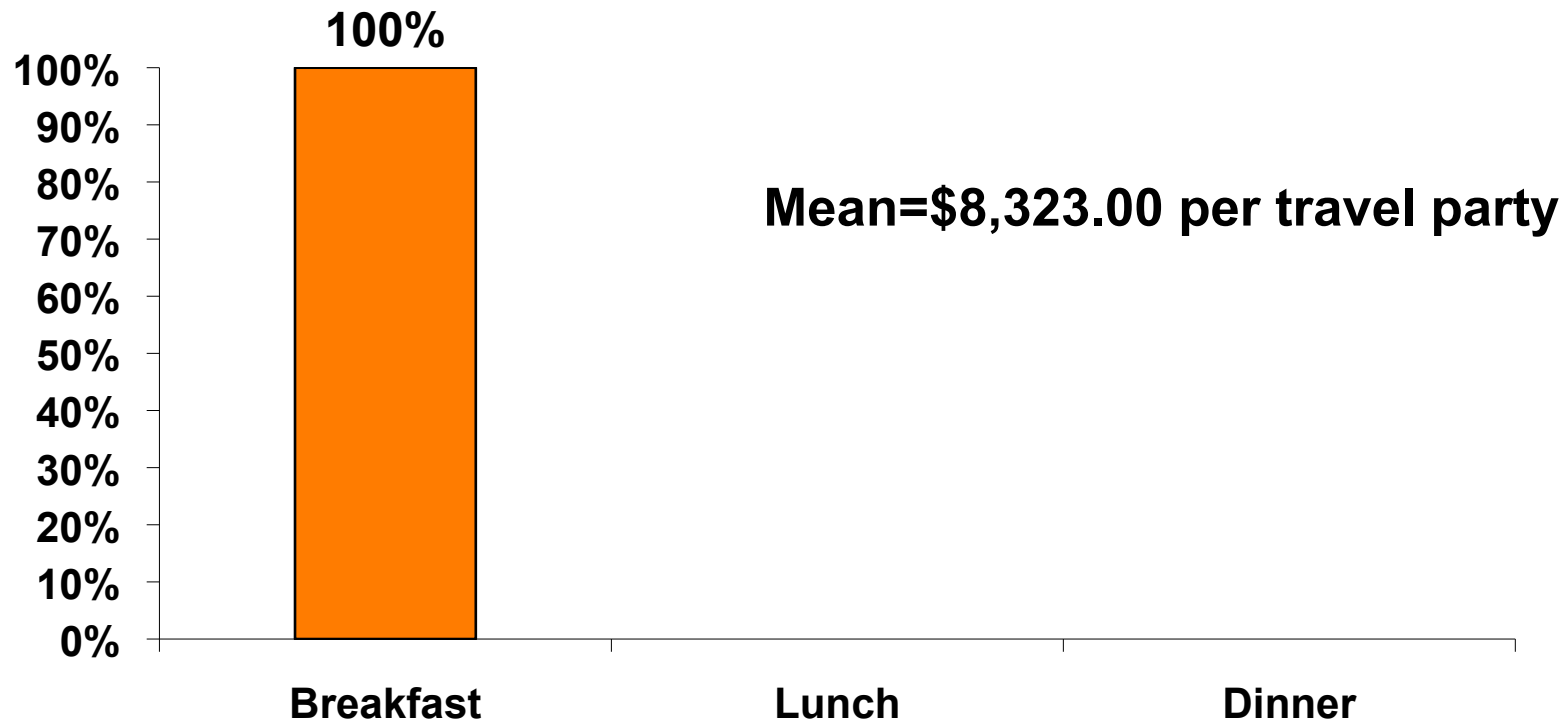
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$5,366.19
Air & Accommodation w/ daily meal package	\$8,323.00
Air only	\$2,166.59
Accommodation only	\$2,031.37
Accommodation w/ daily meal only	\$3,444.30
Food & Beverages in Hotel	\$-
Ground transportation - Russia	\$16.10
Ground transportation - Guam	\$-
Optional tours/ activities	\$-
Other expenses	\$610.87
Total Prepaid	\$5,626.62

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

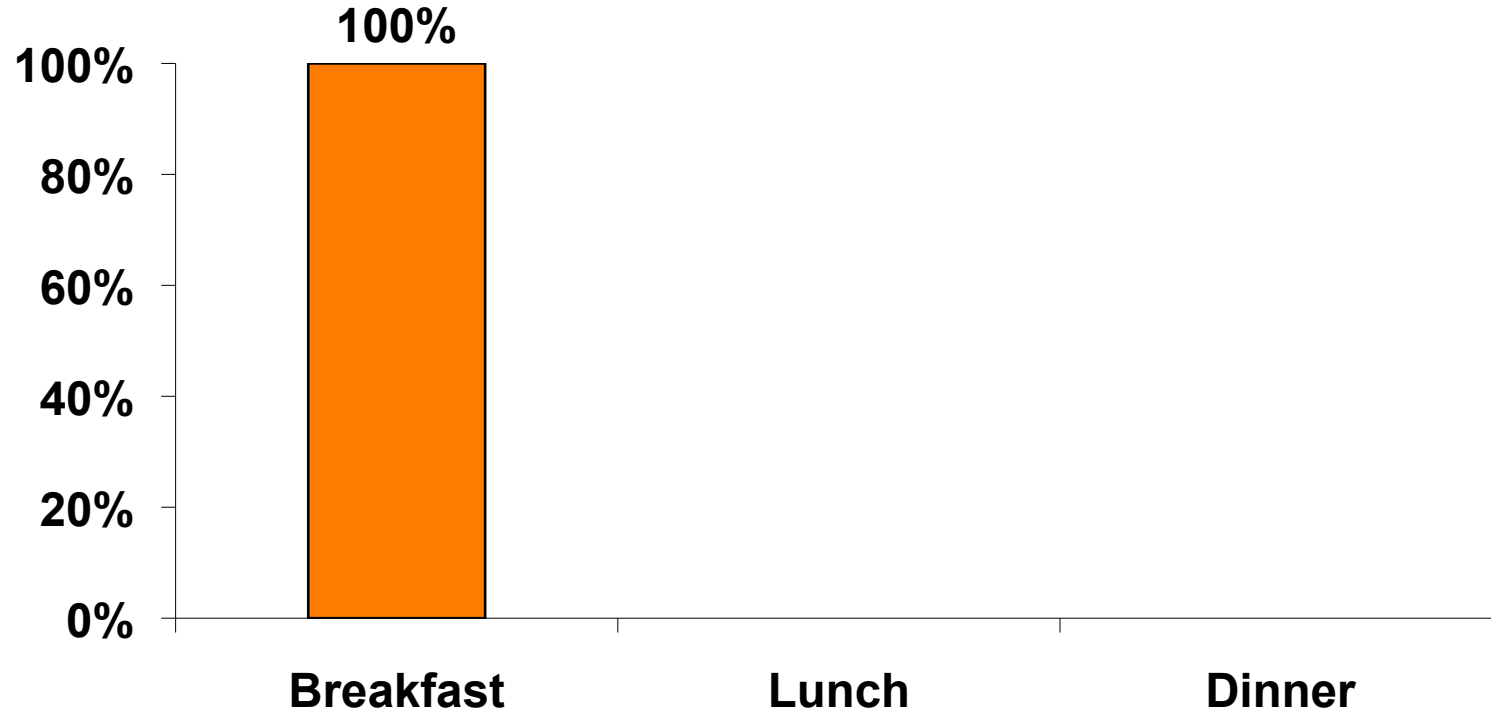
n= 2



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

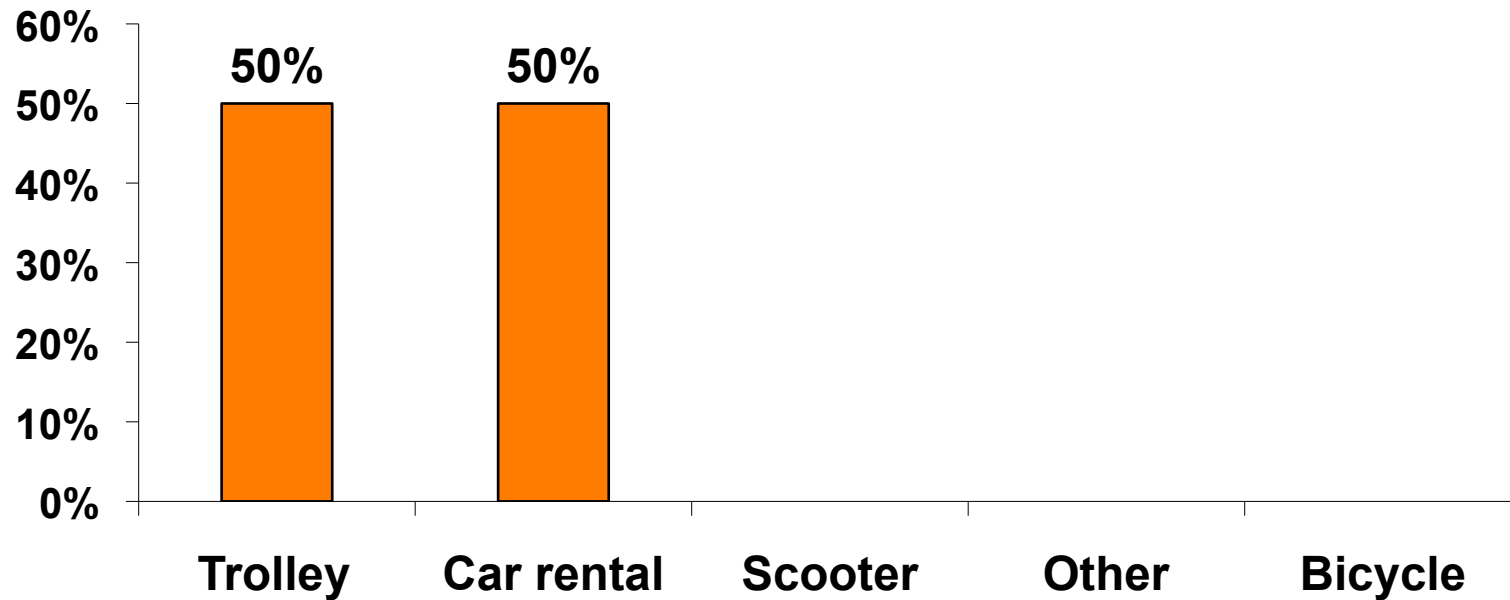
n=2



Mean=\$3,444.30 per travel party

Prepaid Ground Transportation

n=2

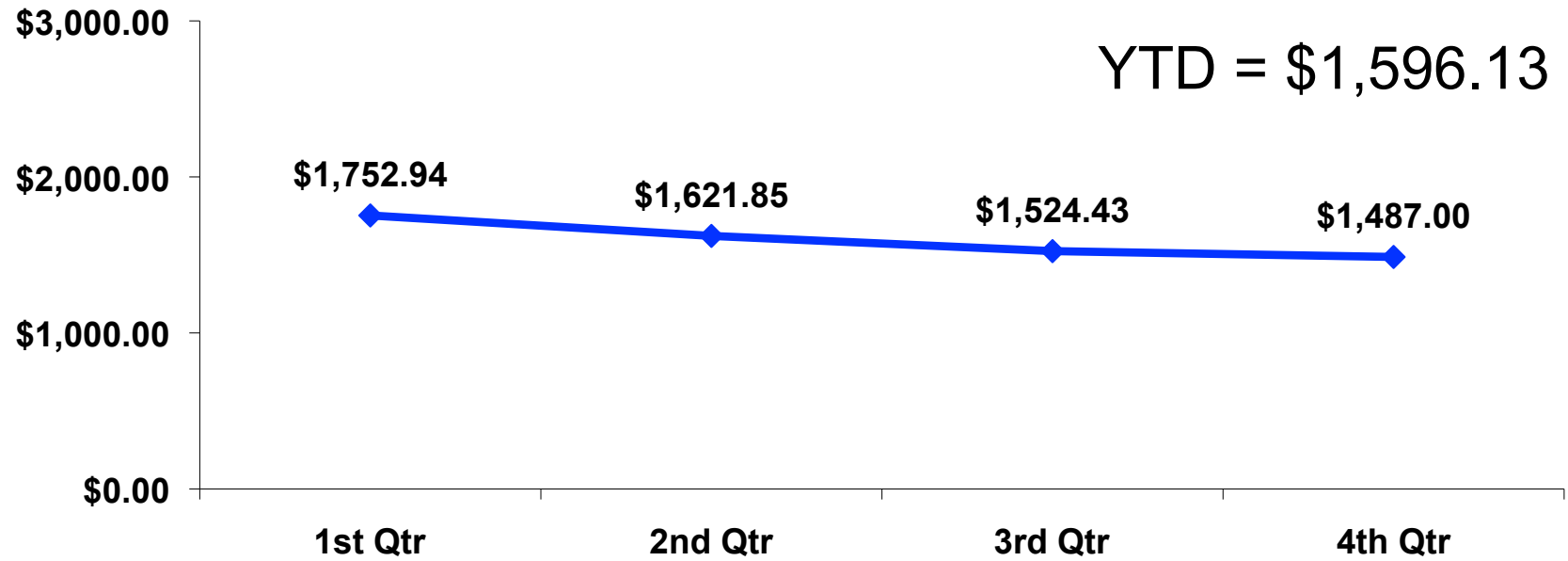


Mean=\$xxx per travel party (none recorded)

On-Island Expenditures

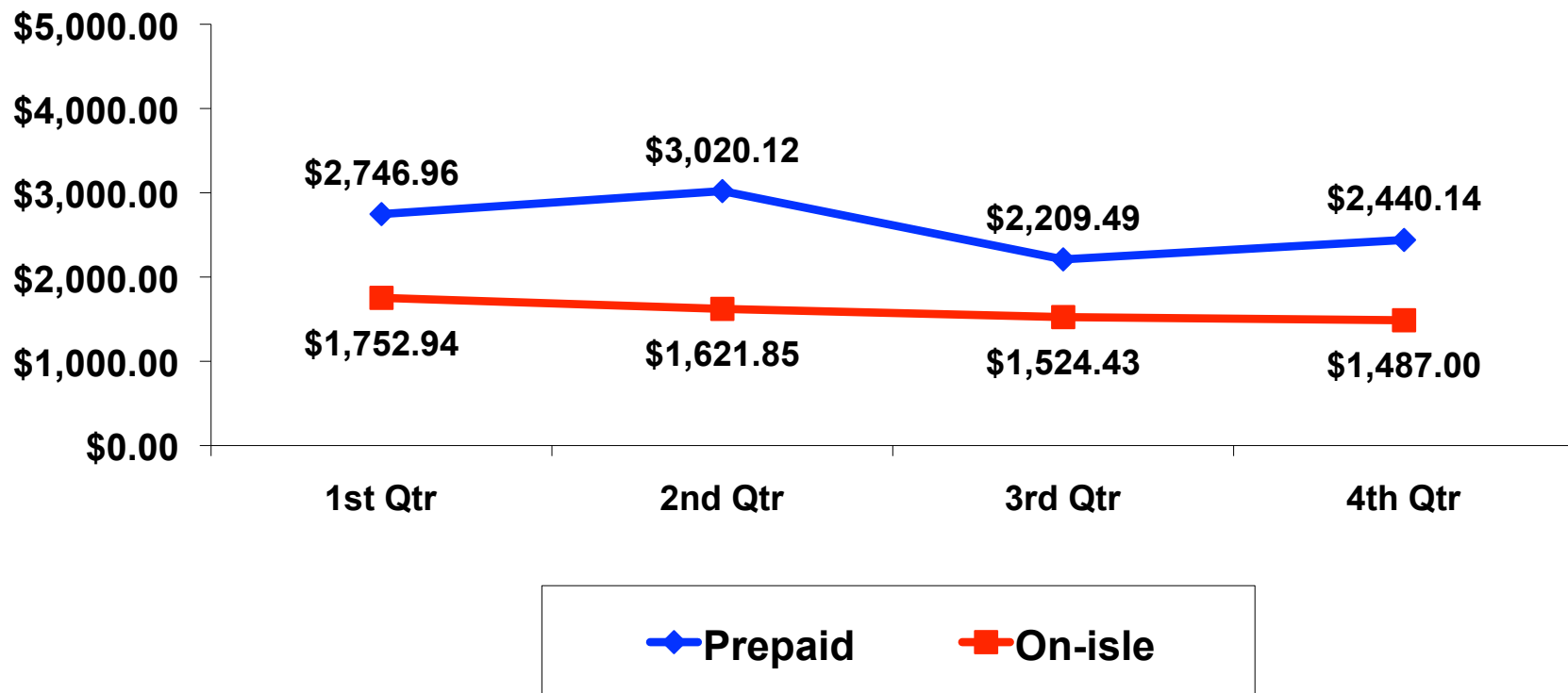
- \$3,319.55 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$20,000 = Maximum (highest amount recorded for the entire sample)
- \$1,596.13 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person



Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$2,603.50 On-Island 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	\$1,596.13	\$1,591.95	\$1,600.39	\$1,348.12	\$1,451.79	\$1,627.45	\$1,650.75	\$1,885.74	\$1,472.92	\$1,666.24	\$1,517.38
	Median	\$1,367	\$1,350	\$1,400	\$1,005	\$1,320	\$1,350	\$1,400	\$1,500	\$1,338	\$1,425	\$1,400
	Minimum	\$0	\$217	\$0	\$600	\$375	\$217	\$638	\$0	\$0	\$340	\$0
	Maximum	\$7,750	\$7,750	\$6,000	\$3,000	\$5,567	\$7,750	\$5,000	\$4,180	\$4,500	\$6,000	\$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	\$366.52	\$401.88	\$330.32	\$377.06	\$337.63	\$392.21	\$323.17
	Median	\$290	\$300	\$250	\$300	\$180	\$300	\$205
F&B FF/STORE	Mean	\$52.14	\$37.95	\$66.71	\$72.35	\$71.14	\$49.60	\$35.40
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$532.18	\$573.87	\$489.51	\$432.35	\$566.70	\$521.88	\$527.80
	Median	\$450	\$500	\$400	\$400	\$420	\$450	\$475
OPT TOUR	Mean	\$362.95	\$399.01	\$326.04	\$364.71	\$347.63	\$370.38	\$364.15
	Median	\$300	\$300	\$250	\$200	\$250	\$300	\$275
GIFT- SELF	Mean	\$1,151.61	\$1,182.20	\$1,120.30	\$879.41	\$1,175.73	\$1,217.83	\$954.36
	Median	\$800	\$800	\$800	\$500	\$940	\$900	\$675
GIFT- OTHER	Mean	\$482.91	\$495.23	\$470.30	\$461.76	\$433.11	\$520.86	\$439.75
	Median	\$300	\$300	\$300	\$150	\$300	\$300	\$300
TRANS	Mean	\$214.38	\$250.34	\$177.58	\$114.41	\$219.67	\$228.91	\$181.61
	Median	\$150	\$200	\$120	\$60	\$150	\$150	\$100
OTHER	Mean	\$168.12	\$169.36	\$166.85	\$158.24	\$176.45	\$176.02	\$141.69
	Median	\$100	\$100	\$100	\$0	\$100	\$100	\$100
TOTAL	Mean	\$3,319.55	\$3,510.05	\$3,124.56	\$2,860.29	\$3,300.59	\$3,468.35	\$2,967.92
	Median	\$2,800	\$2,840	\$2,644	\$2,000	\$2,800	\$2,920	\$2,600

On-Island Expenditures

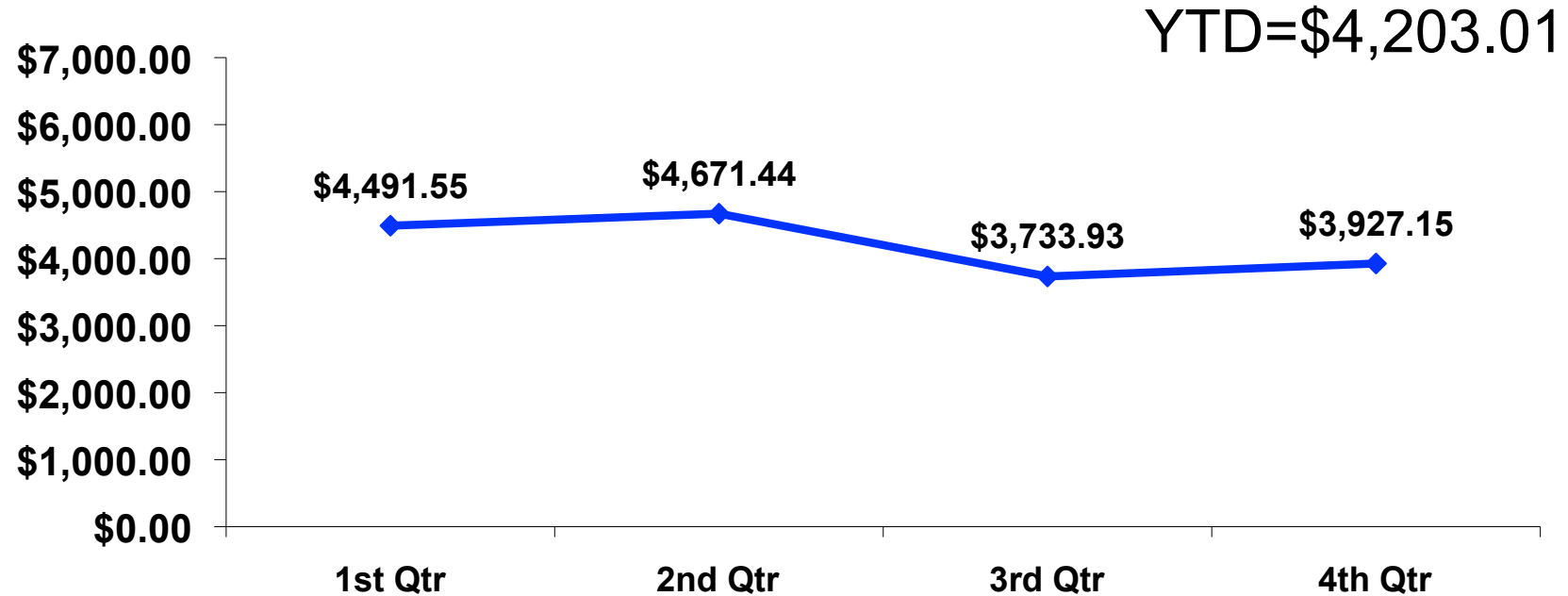
First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$366.52	\$356.84	\$415.62
	Median	\$290	\$250	\$320
F&B FF/STORE	Mean	\$52.14	\$49.32	\$66.06
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$532.18	\$531.70	\$525.24
	Median	\$450	\$450	\$400
OPT TOUR	Mean	\$362.95	\$363.14	\$356.00
	Median	\$300	\$300	\$250
GIFT- SELF	Mean	\$1,151.61	\$1,042.93	\$1,579.71
	Median	\$800	\$800	\$1,000
GIFT- OTHER	Mean	\$482.91	\$451.13	\$627.81
	Median	\$300	\$300	\$300
TRANS	Mean	\$214.38	\$206.72	\$249.67
	Median	\$150	\$150	\$195
OTHER	Mean	\$168.12	\$169.21	\$153.14
	Median	\$100	\$100	\$100
TOTAL	Mean	\$3,319.55	\$3,150.56	\$4,005.00
	Median	\$2,800	\$2,690	\$3,200

Total Expenditures Per Person (Prepaid & On-Island)

- \$4,203.01 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$12,596 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

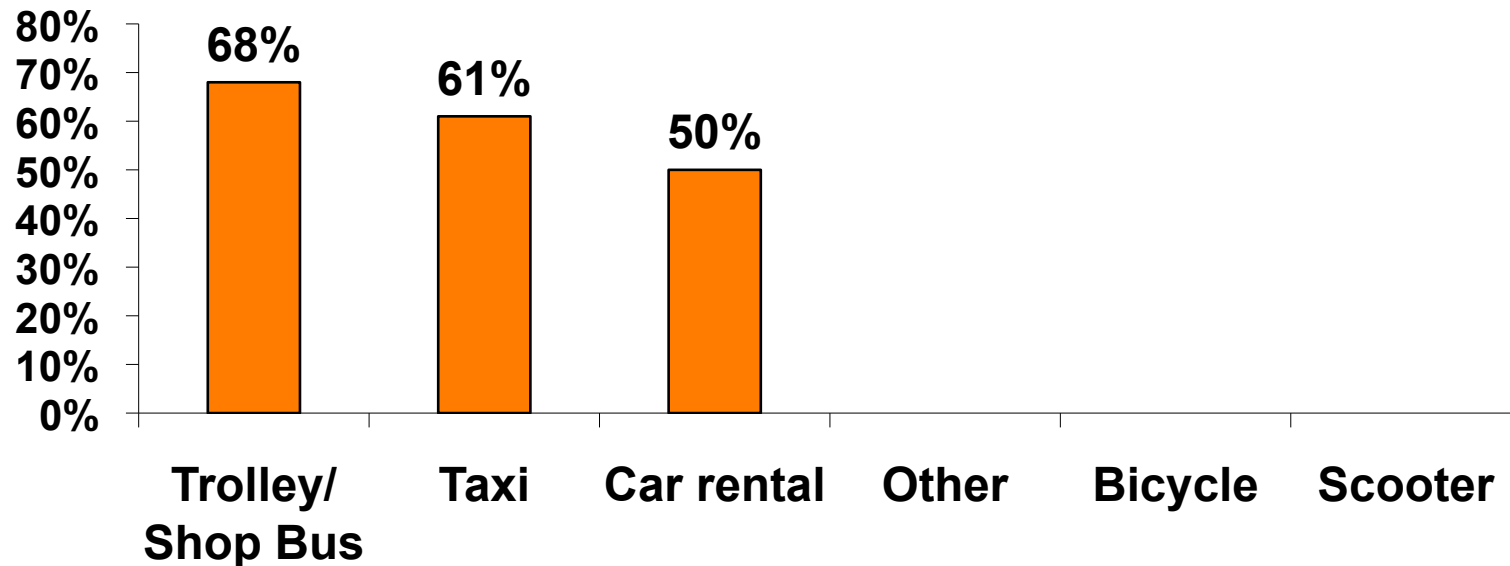


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$366.52
Food & beverage in fast food restaurant/ convenience store	\$52.14
Food & beverage at restaurants or drinking establishments outside a hotel	\$532.18
Optional tours and activities	\$362.95
Gifts/ souvenirs for yourself/companions	\$1,151.61
Gifts/ souvenirs for friends/family at home	\$482.91
Local transportation	\$214.38
Other expenses not covered	\$168.12
Average Total	\$3,319.55

Local Transportation

n=541



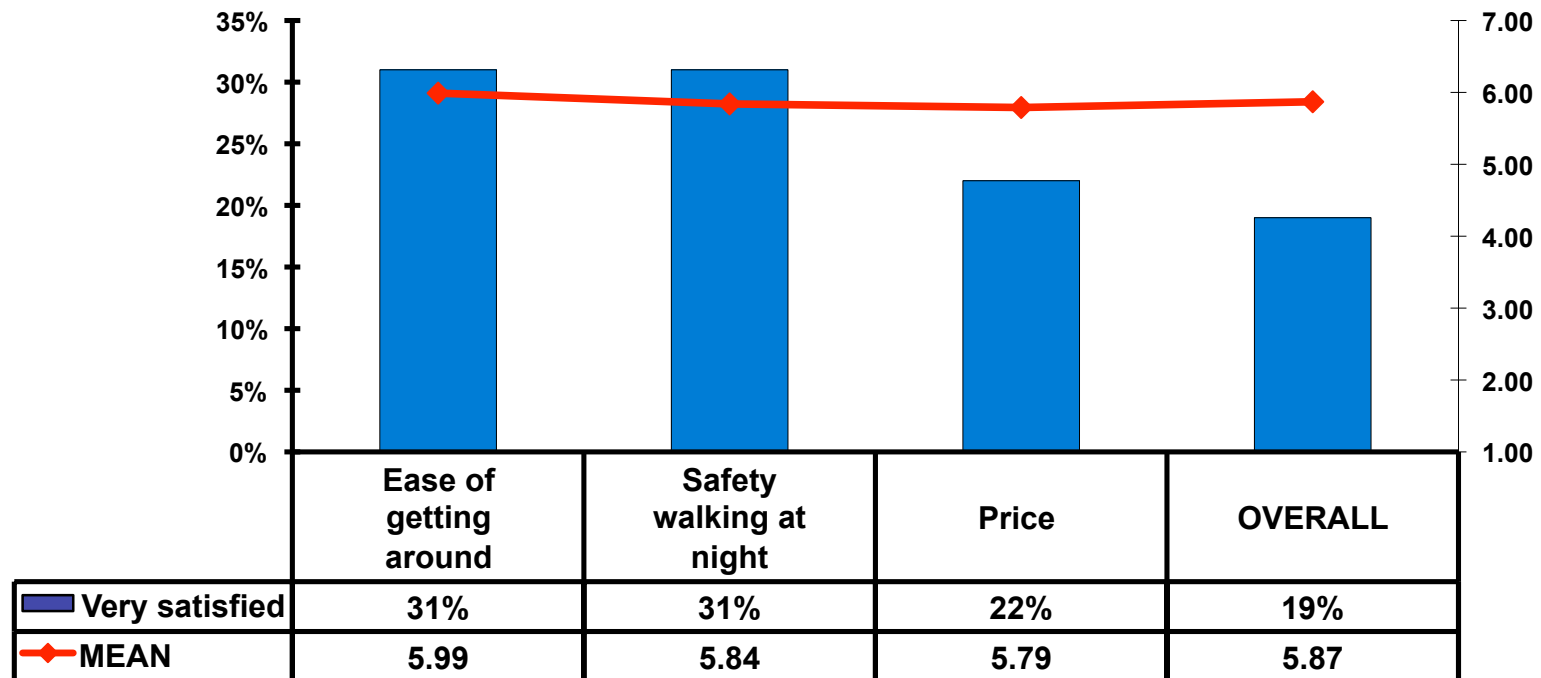
Mean=\$214.38 per travel party

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

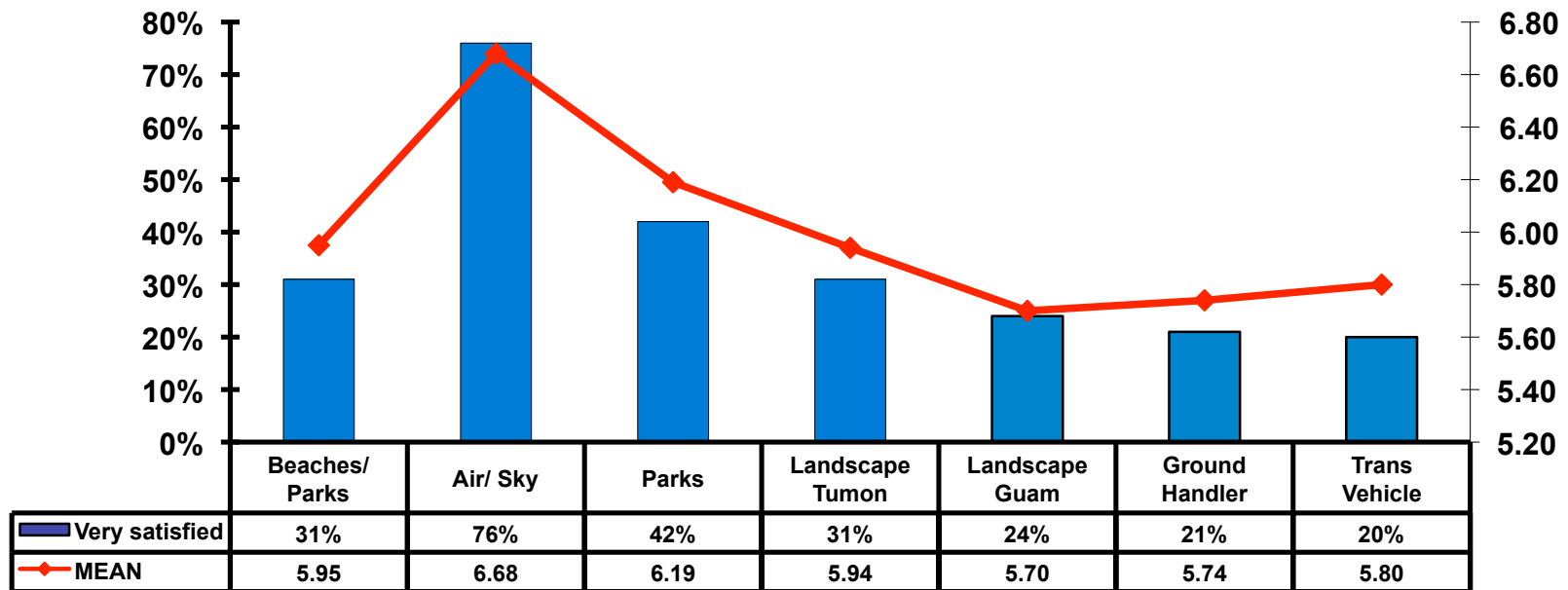
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

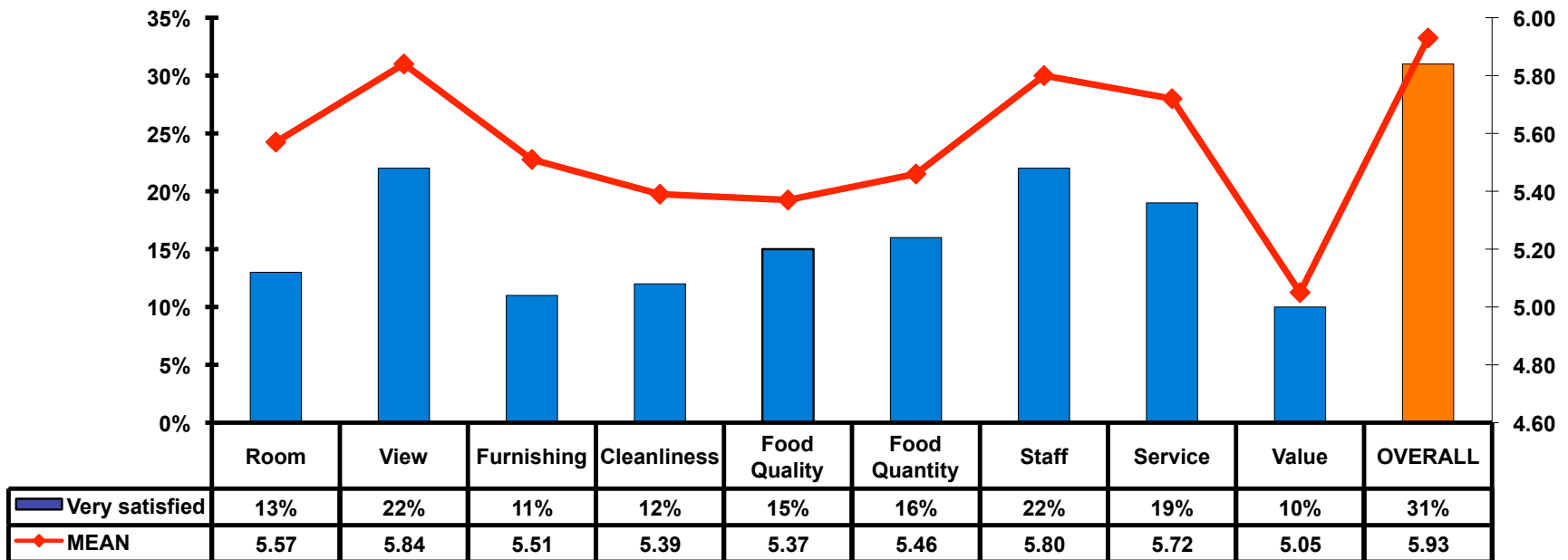
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

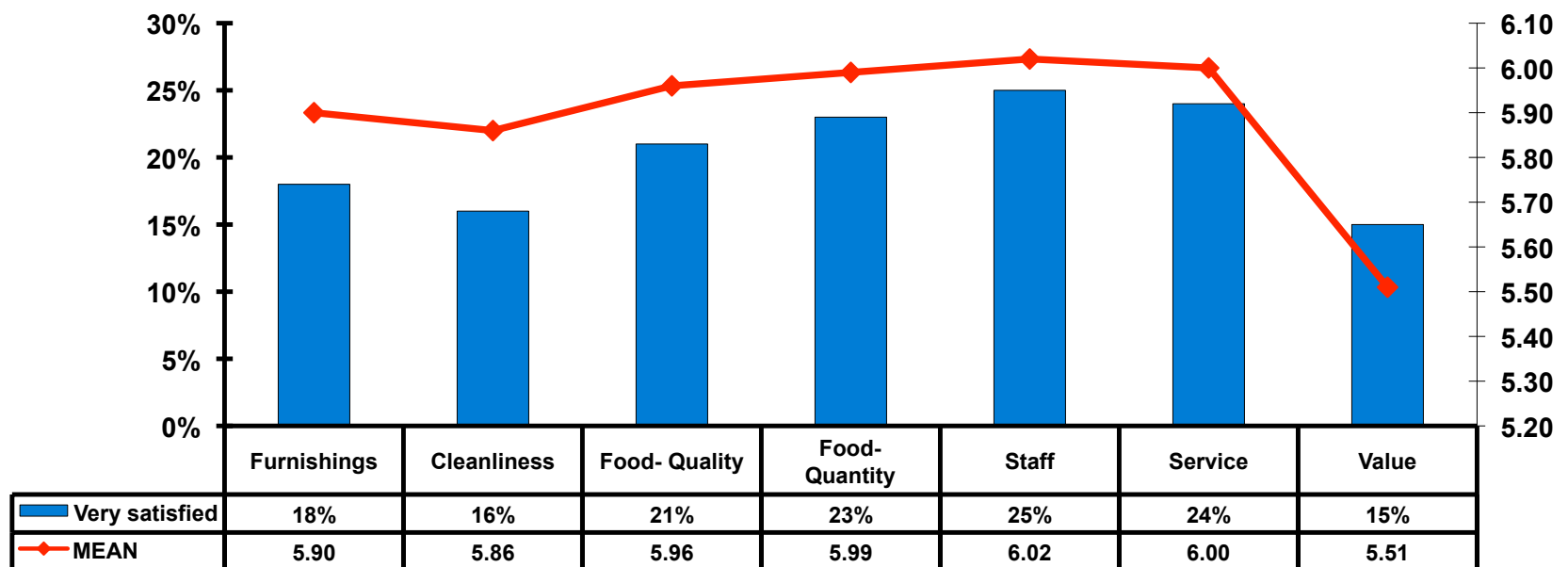
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

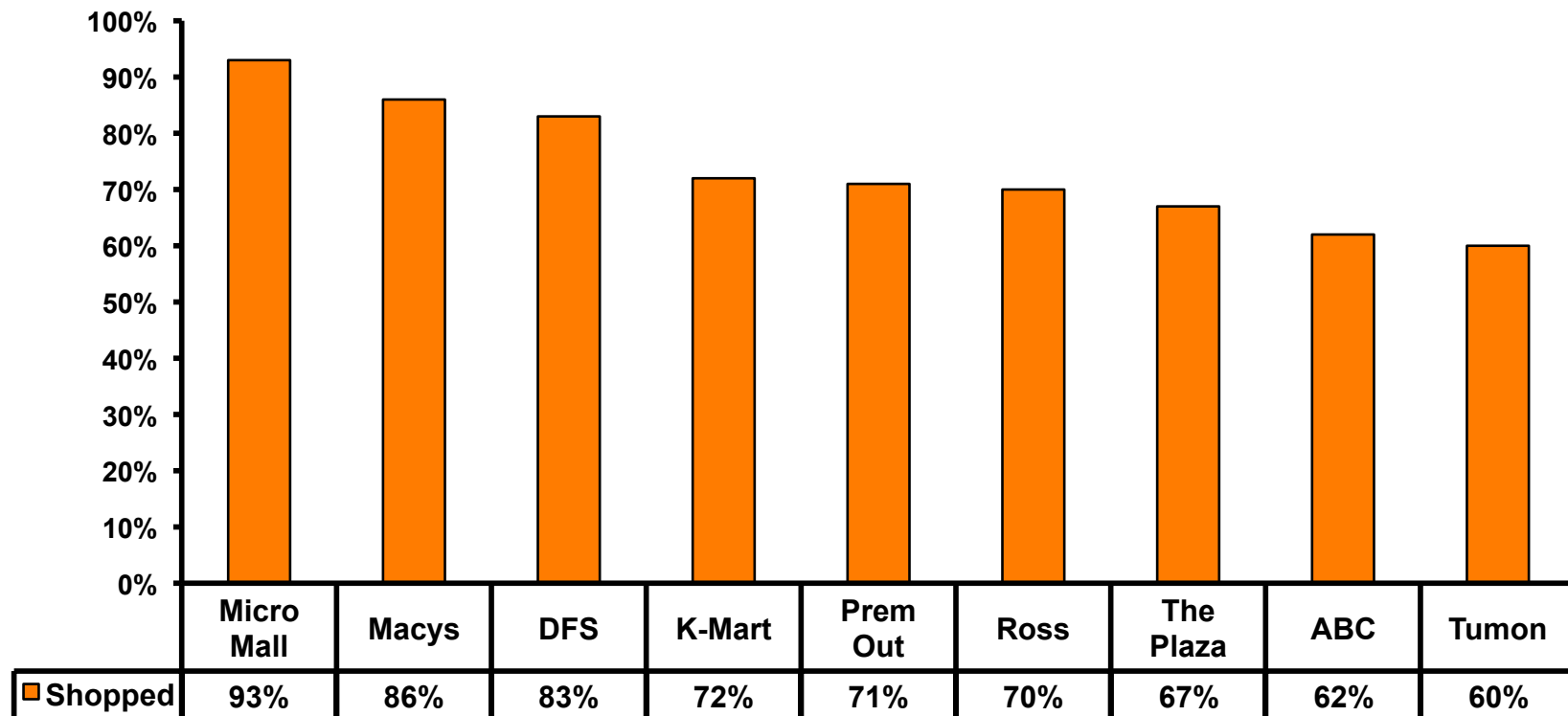
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

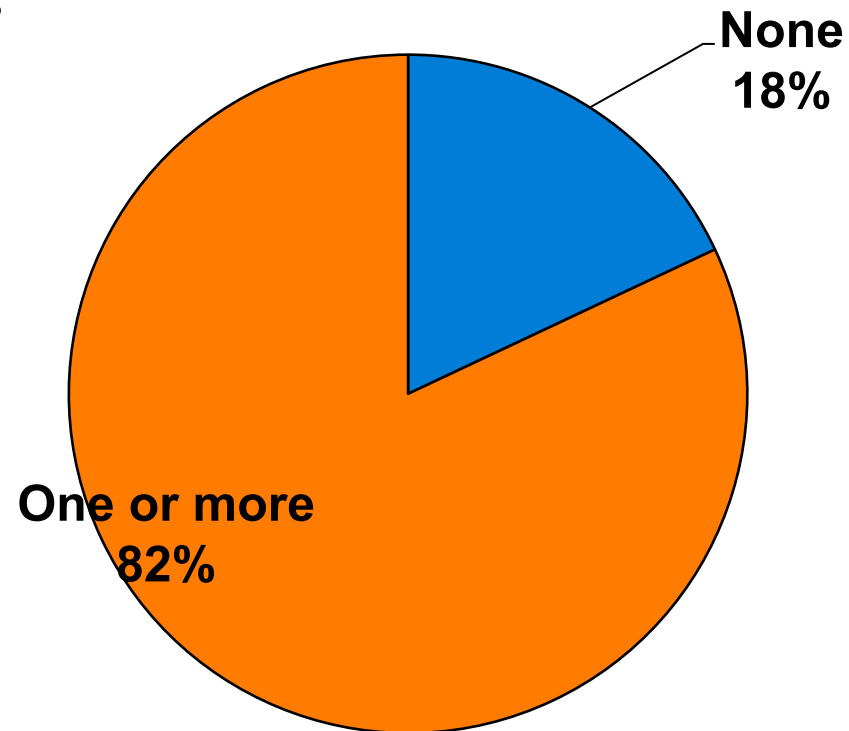
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

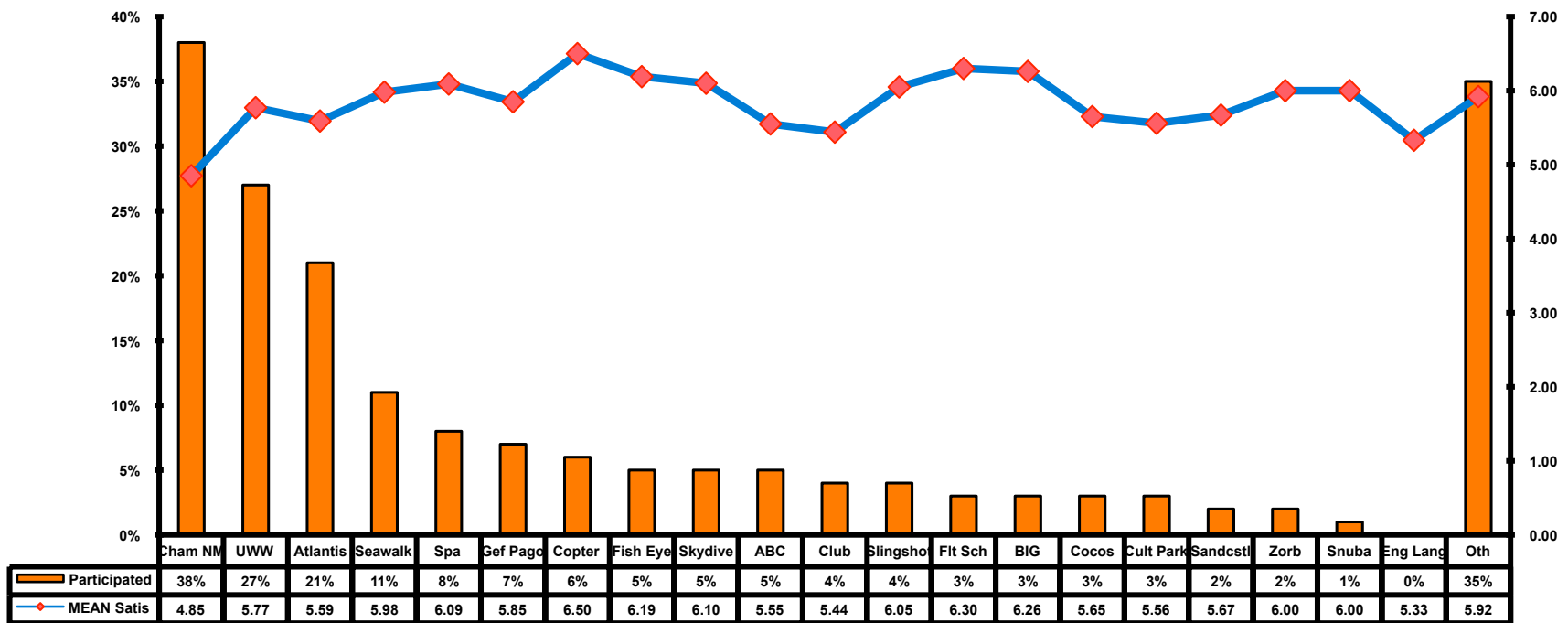
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 69%	Score of 6 to 7 = 68%
Score of 4 to 5 = 29%	Score of 4 to 5 = 30%
Score 1 to 3 = 7%	Score 1 to 3 = 1%
MEAN = 5.84	MEAN = 5.83

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

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 62%	Score of 6 to 7 = 41%
Score of 4 to 5 = 35%	Score of 4 to 5 = 42%
Score 1 to 3 = 2%	Score 1 to 3 = 16%
MEAN = 5.70	MEAN = 4.99

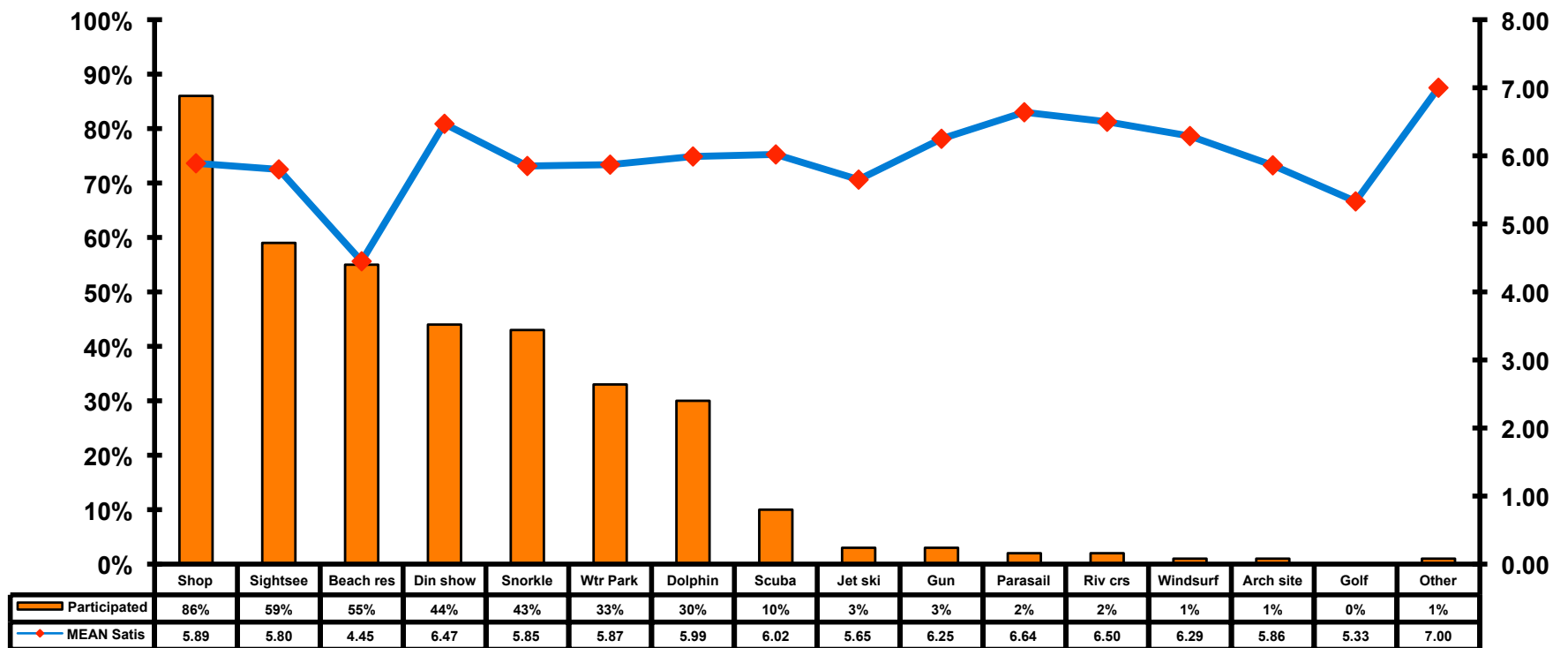
Night Tours Satisfaction

7pt Rating Scale

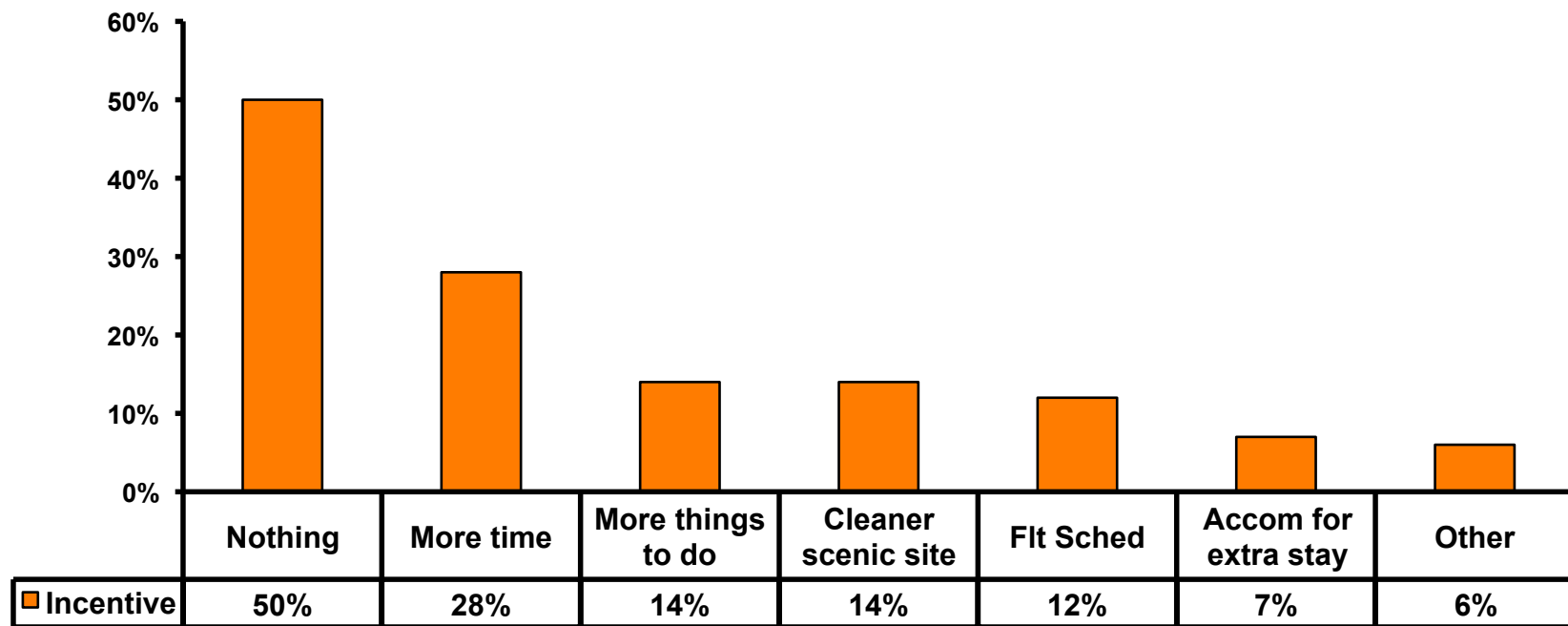
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 34%	Score of 6 to 7 = 35%
Score of 4 to 5 = 56%	Score of 4 to 5 = 49%
Score 1 to 3 = 9%	Score 1 to 3 = 16%
MEAN = 4.93	MEAN = 4.79

Satisfaction with Other Activities



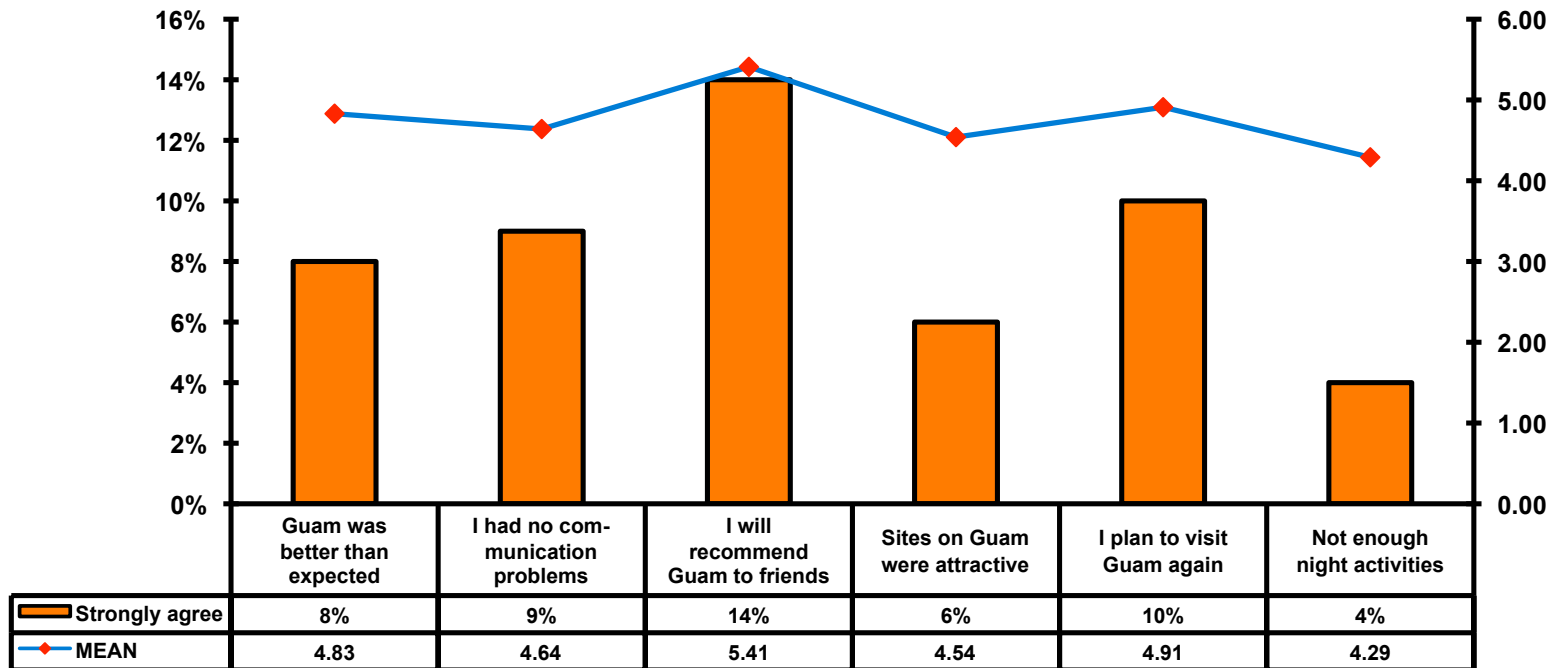
What would it take to make Guam more enjoyable for families?



On-Island Perceptions

7pt Rating Scale

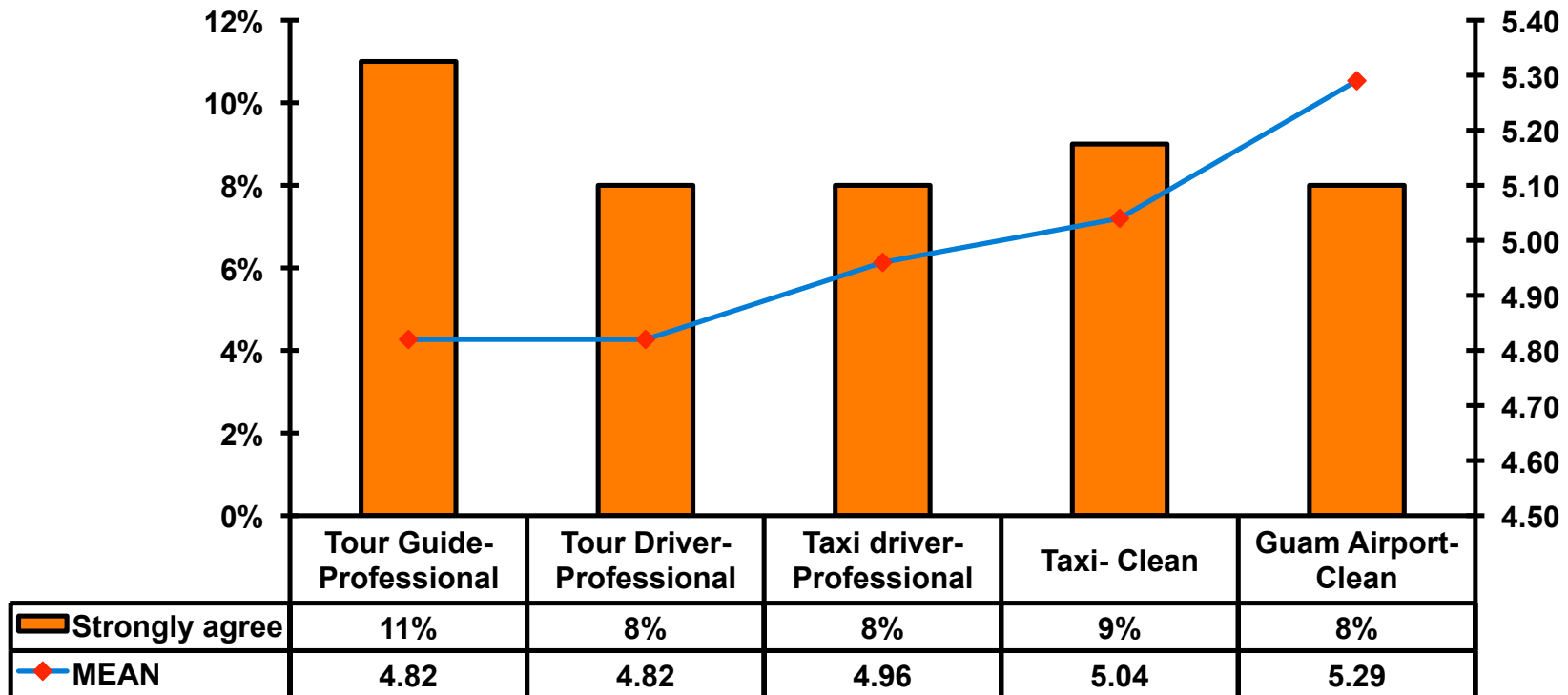
7=Very Satisfied/ 1=Very Dissatisfied



Transportation

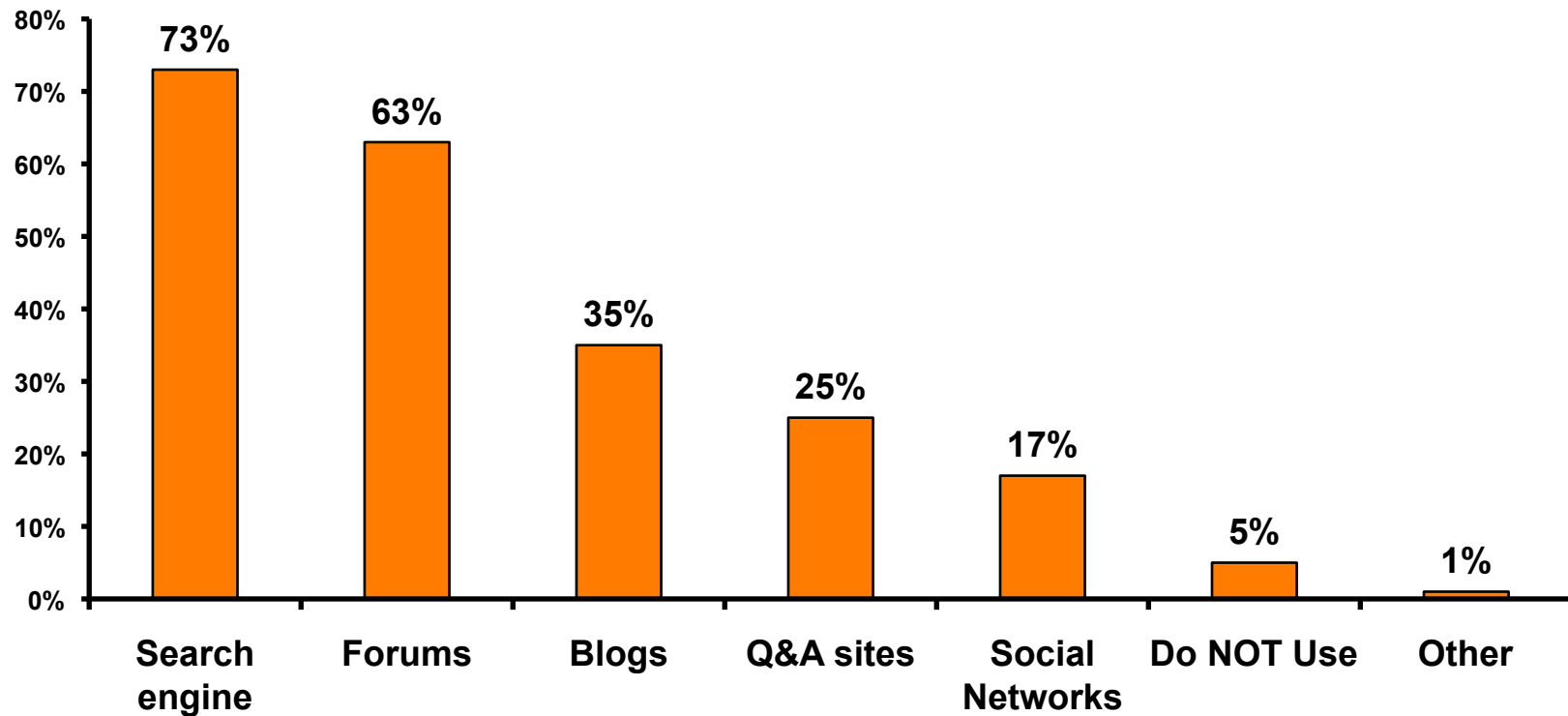
7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



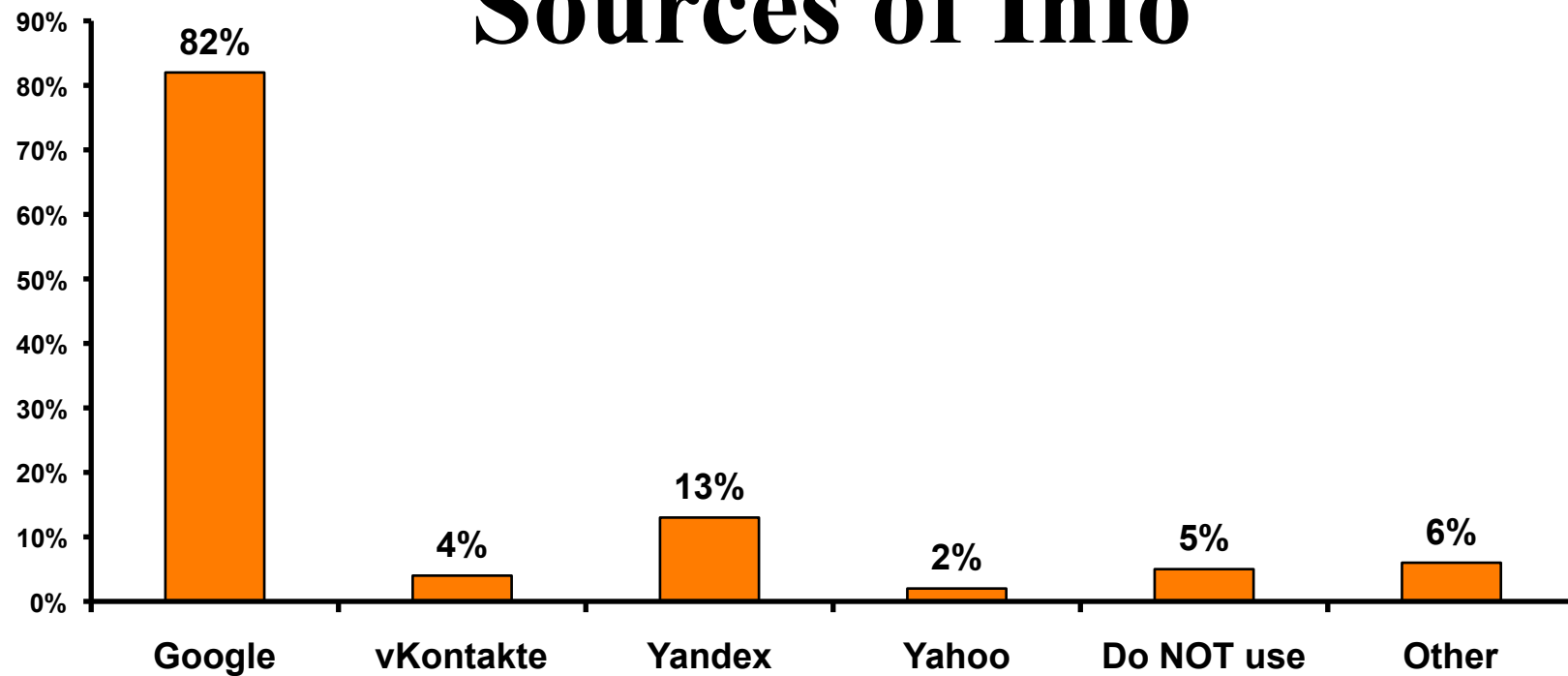
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

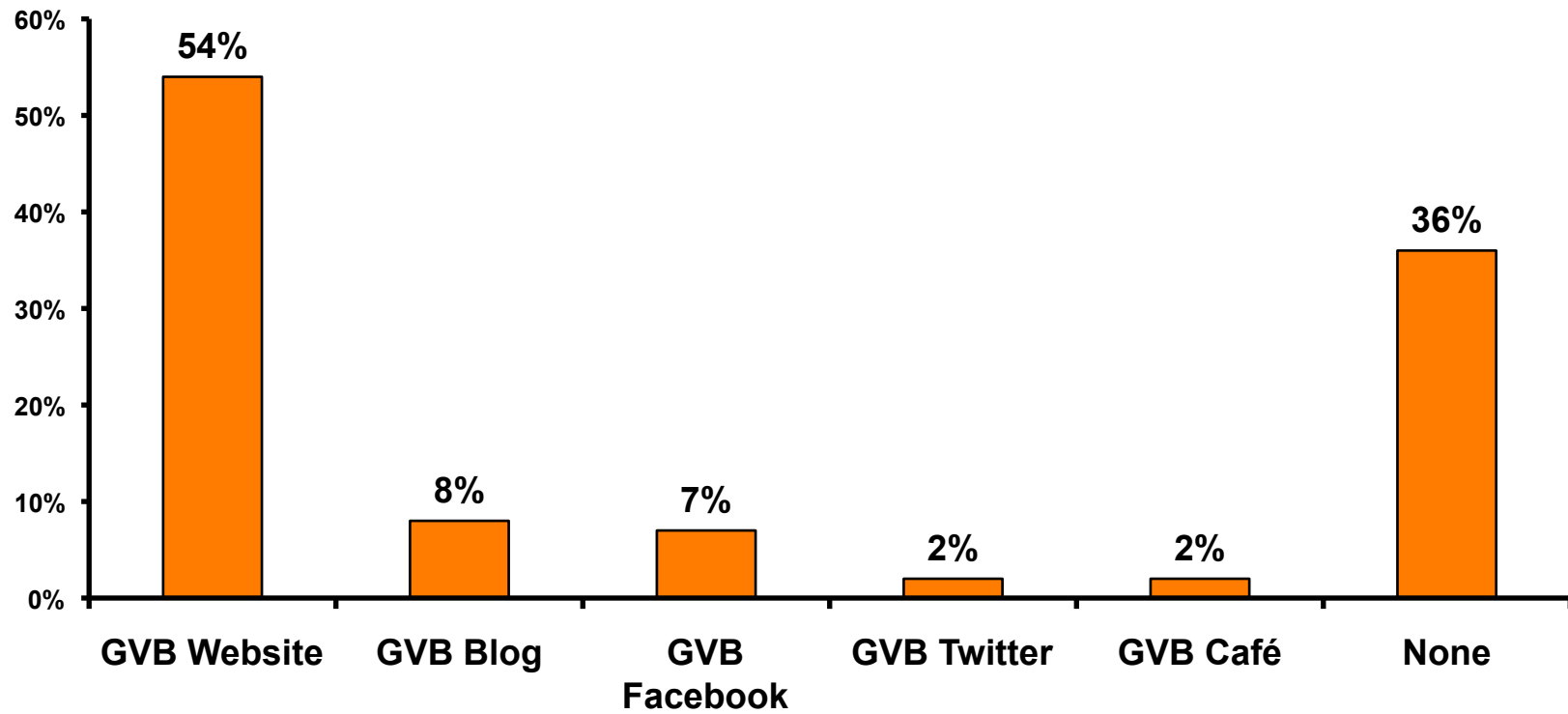


Internet- Things To Do

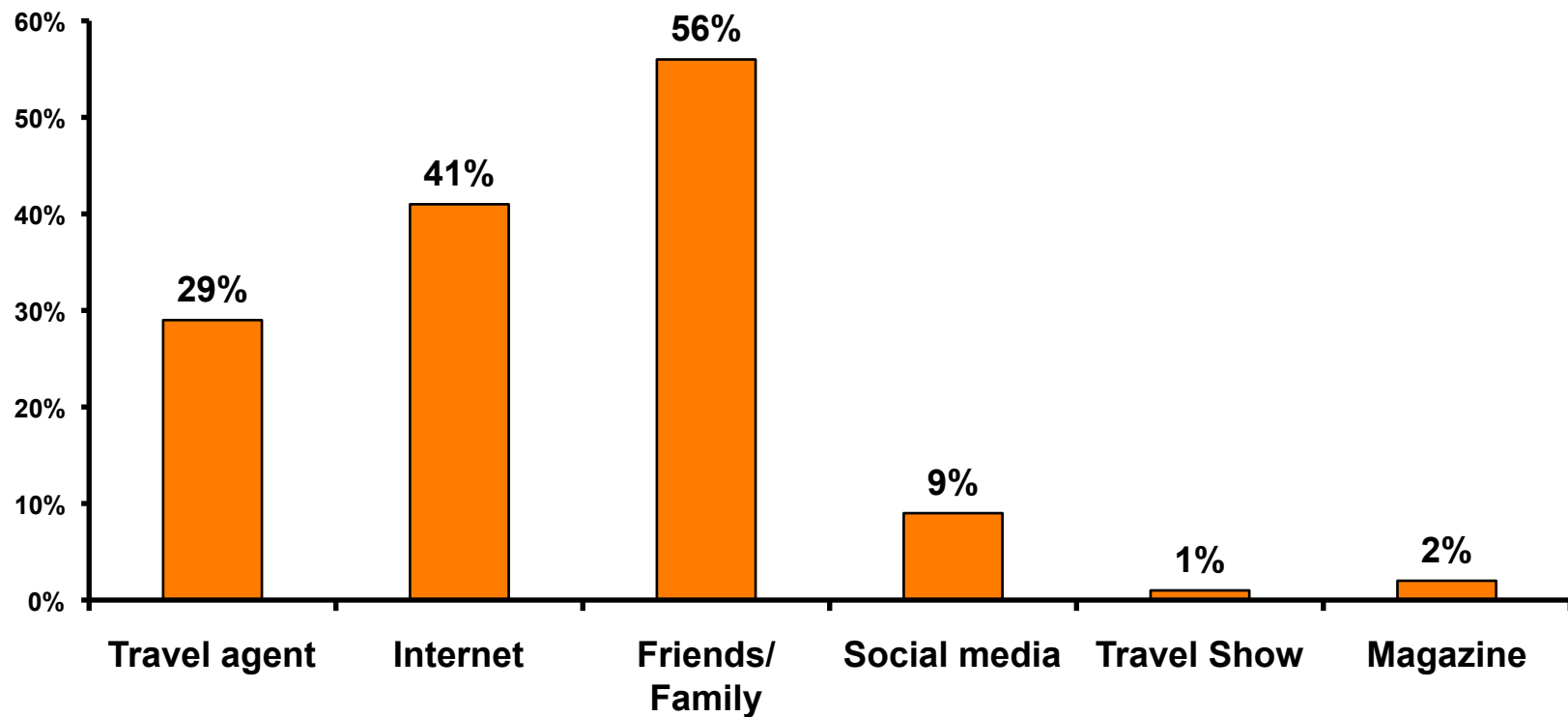
Sources of Info



Internet- GVB Sources

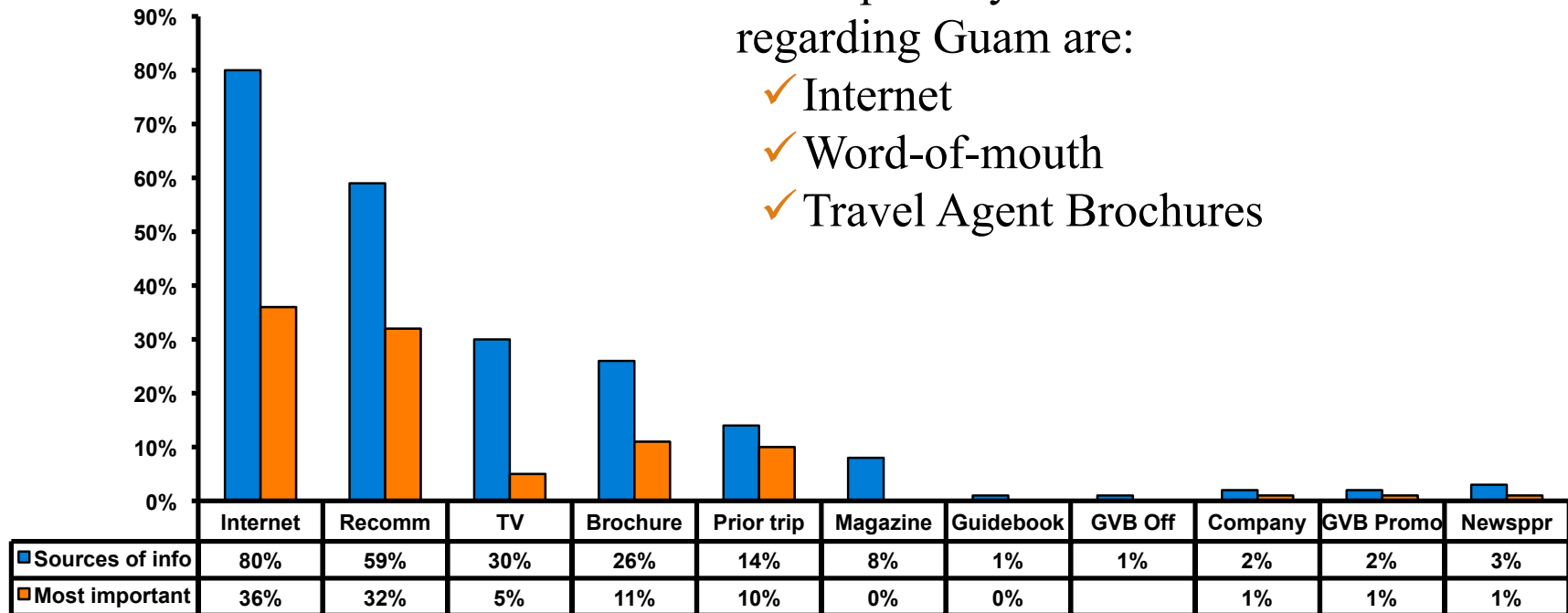


Travel Motivation- Info Sources



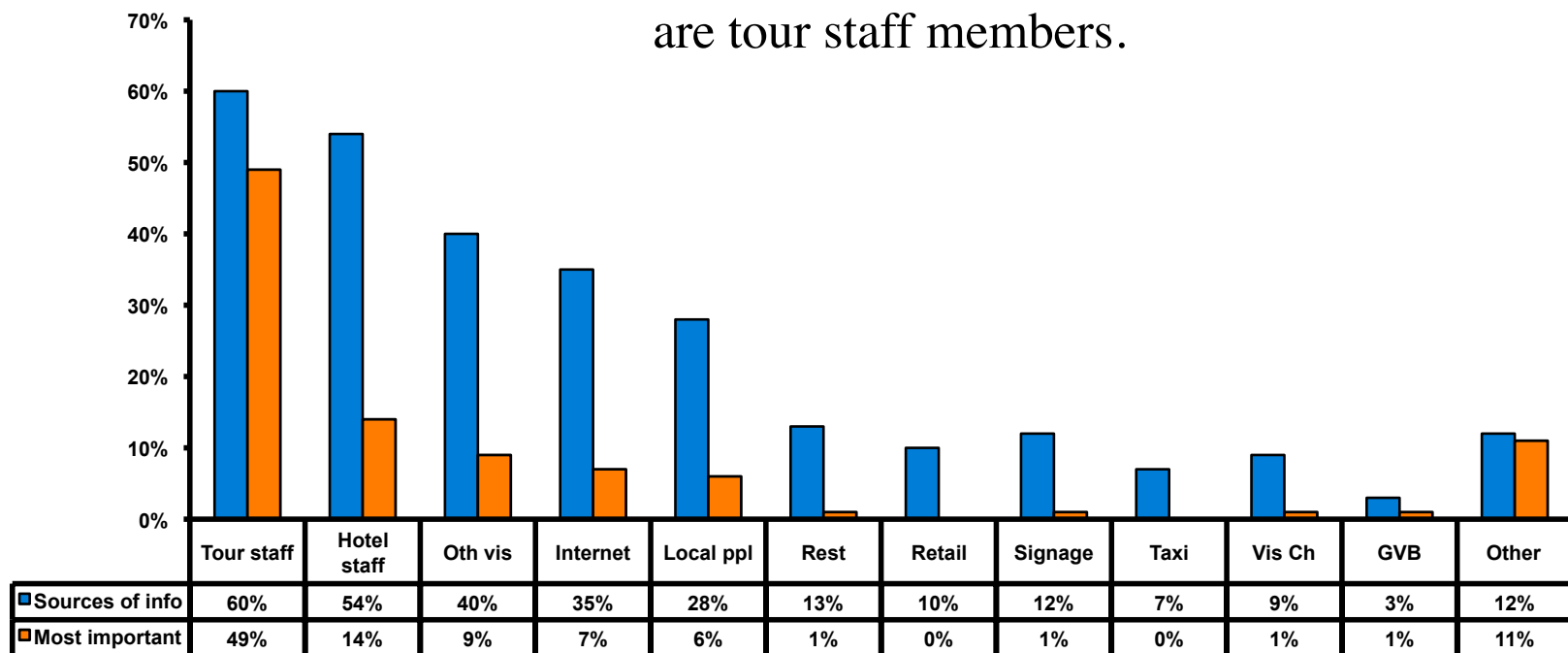
Sources of Information Pre-arrival

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



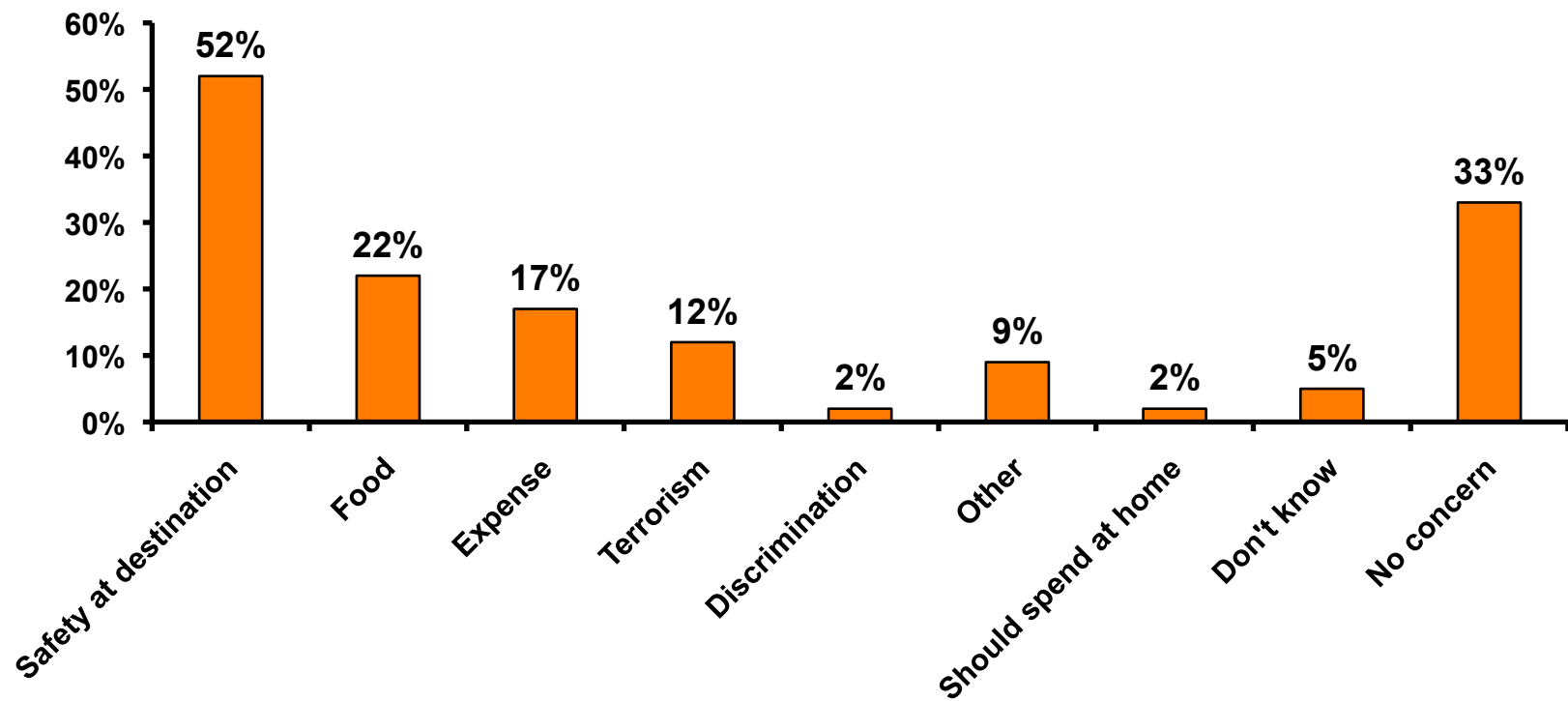
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

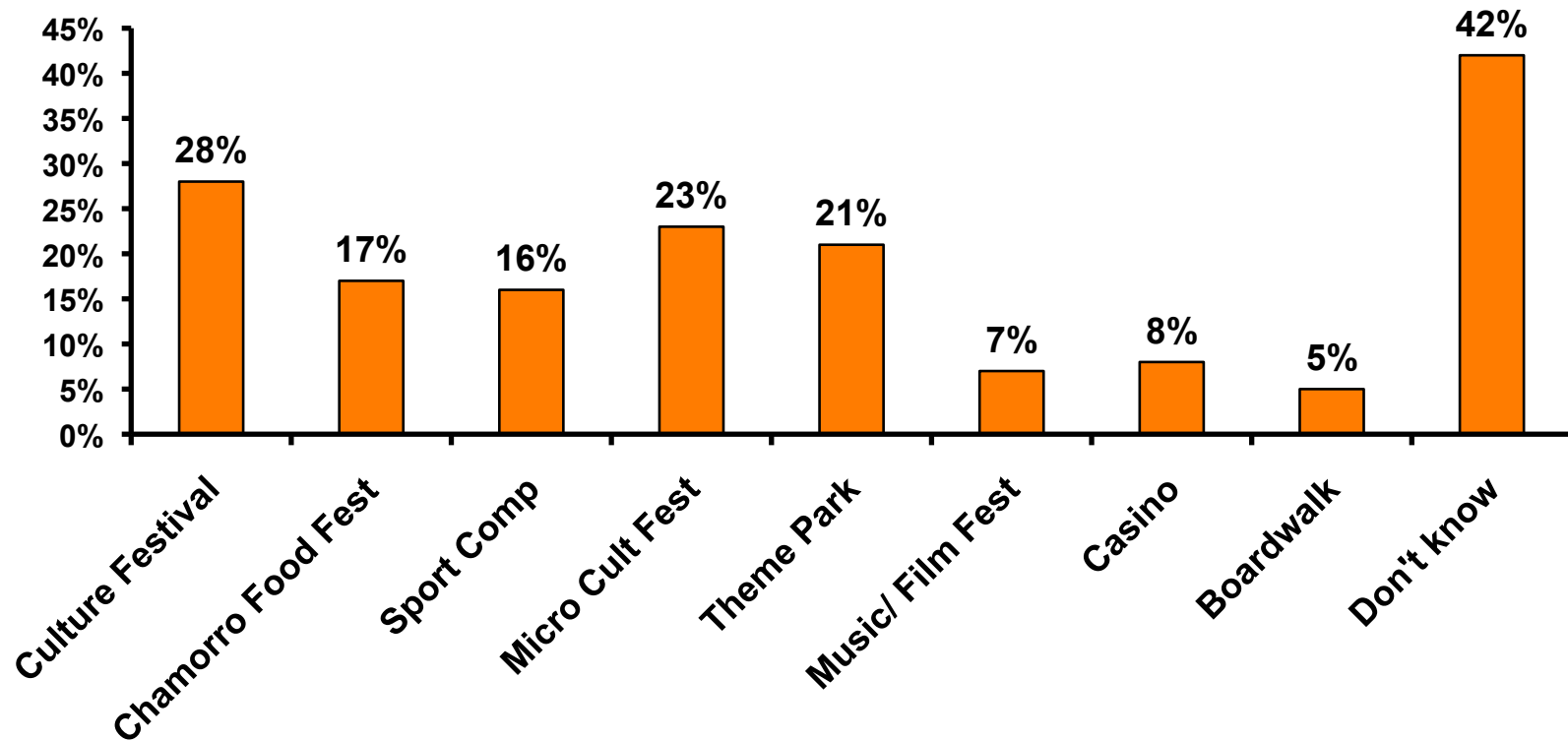
Concerns about travel outside of Russia - Overall



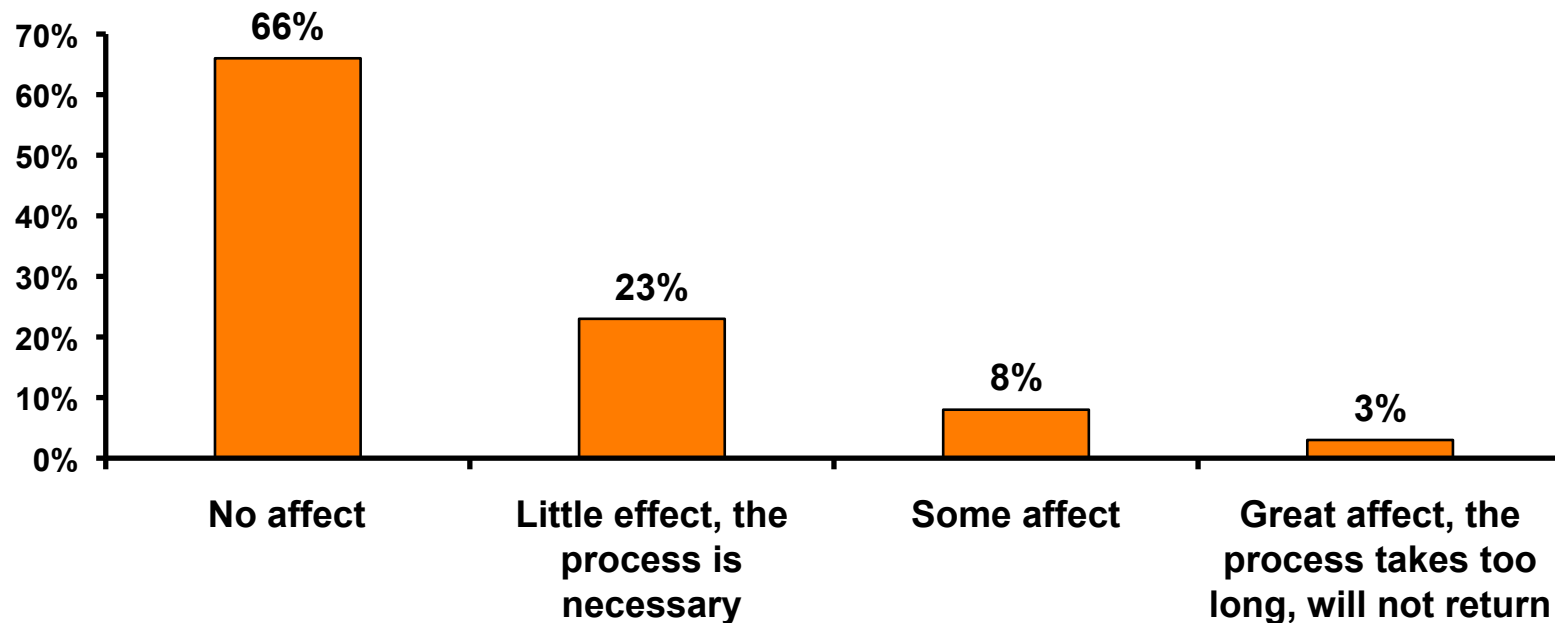
Concerns about travel outside of Russia - By Age & Income

		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+	No Income	
Q21	Safety	52%	53%	56%	50%	51%	58%	55%	50%	55%	38%	43%	50%	33%	
	No concerns	33%	29%	32%	34%	34%	26%	30%	39%	29%	45%	52%	31%	67%	
	Food	22%	24%	28%	21%	15%	25%	18%	21%	31%	21%	14%	35%		
	Expense	17%	29%	19%	15%	16%	25%	17%	15%	18%	10%	5%	4%		
	Terrorism	12%		10%	13%	14%	11%	16%	8%	14%	12%	10%	4%		
	Other	9%	18%	8%	9%	9%	13%	6%	13%	16%		10%	12%		
	Don't know	5%		4%	6%	5%	5%	8%		8%	2%		4%		
	Should spend at home	2%		1%	3%		4%	3%			2%				
	Discrimination against Russians	2%	6%	2%	1%	1%	1%	1%			7%	5%	4%		
	Total	Count	600	17	135	327	117	104	236	104	51	42	21	26	3

Activities/ Attractions- Appeal



Security Screening/ Immigration Process at Guam International Airport



Airport Arrival Experience

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

