



# **GUAM VISITORS BUREAU**

## **Russia Visitor Tracker Exit Profile**

### **FY2014**

### **1ST Qtr. (OCT~DEC 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 **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.

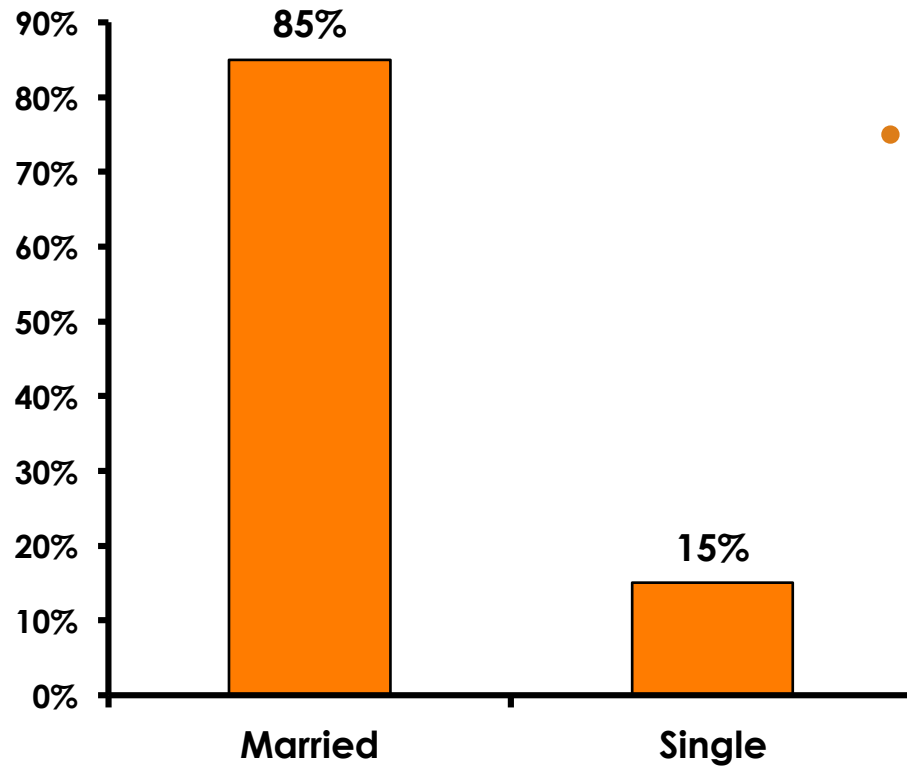
# Objectives

- 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

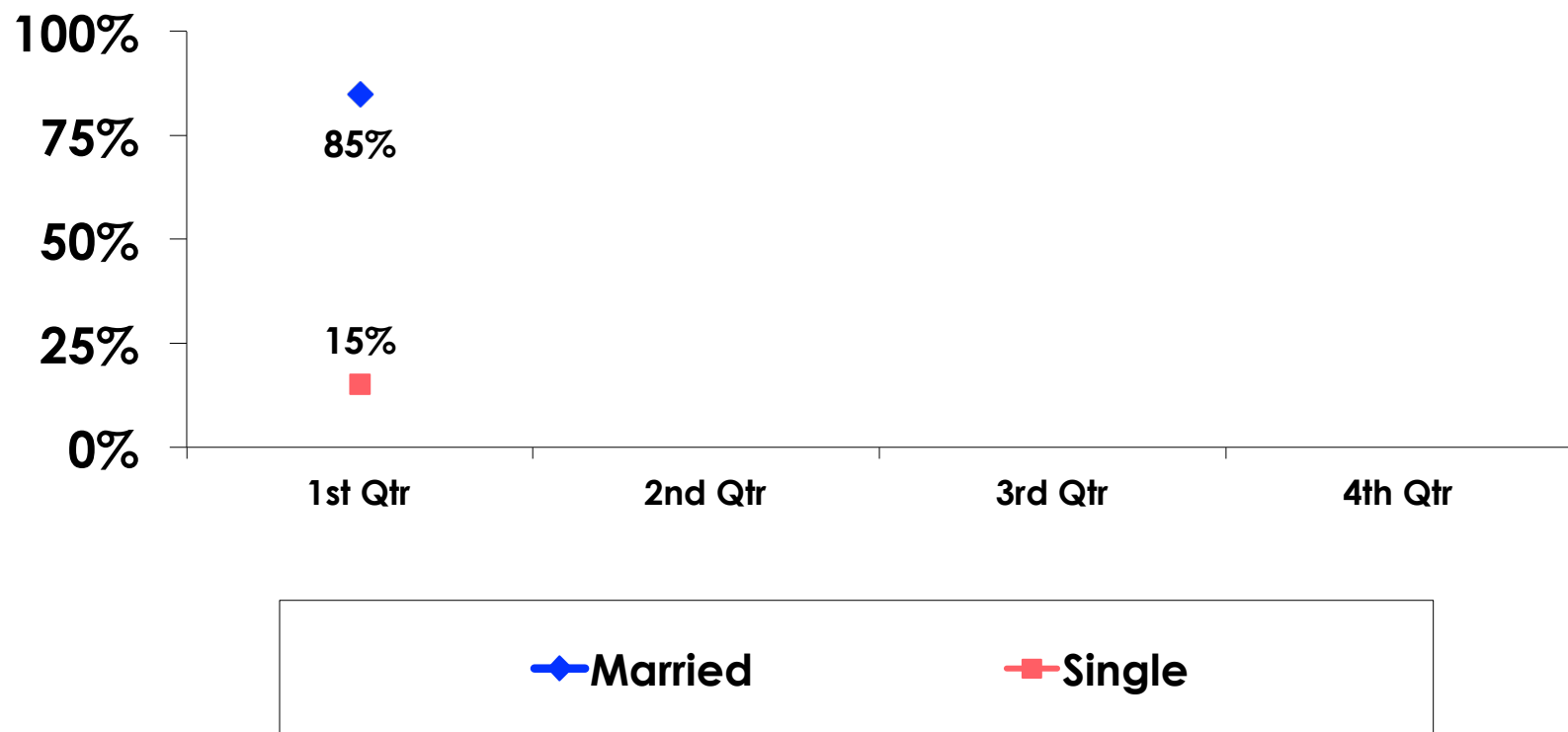
## **PROFILE OF RESPONDENTS**

# Marital Status - Overall

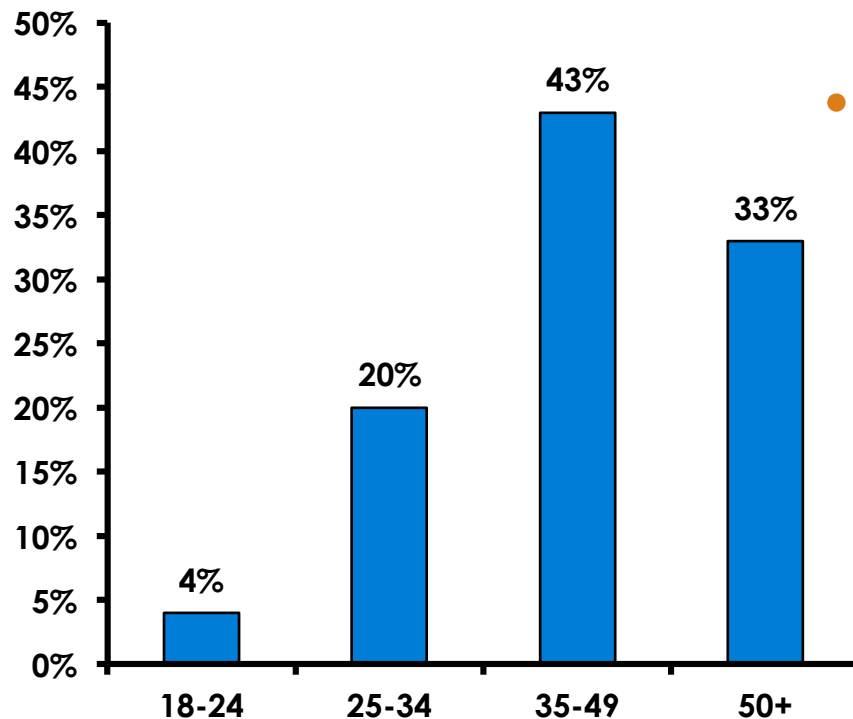


- Majority of Russian visitors are married.

# Marital Status

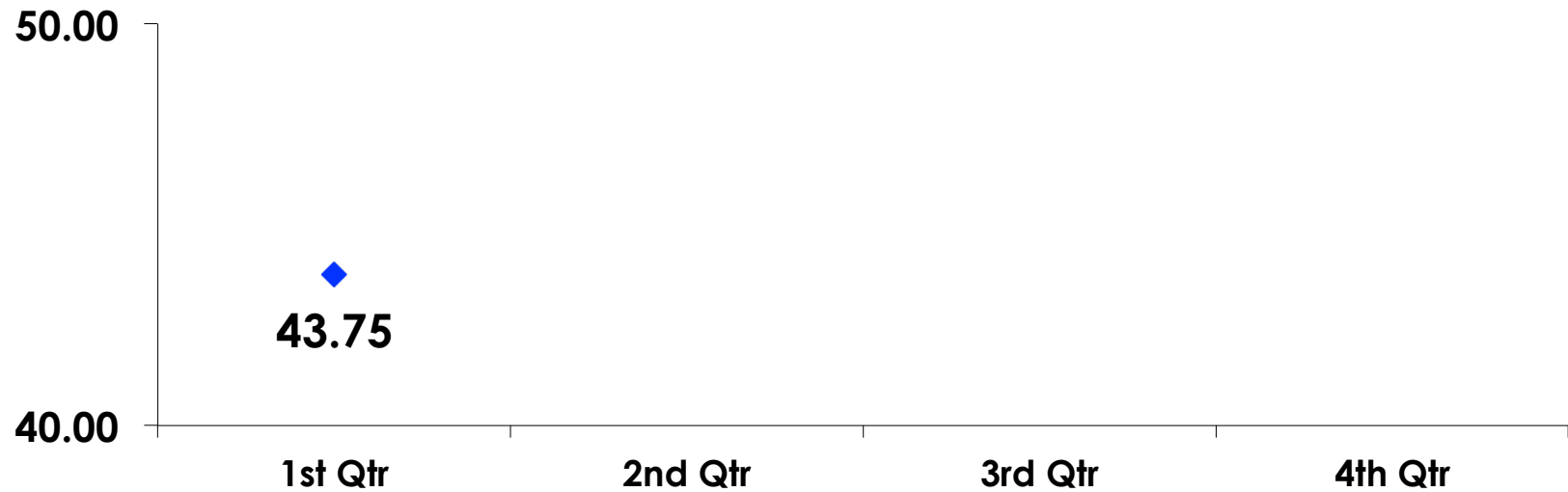


# Age - Overall



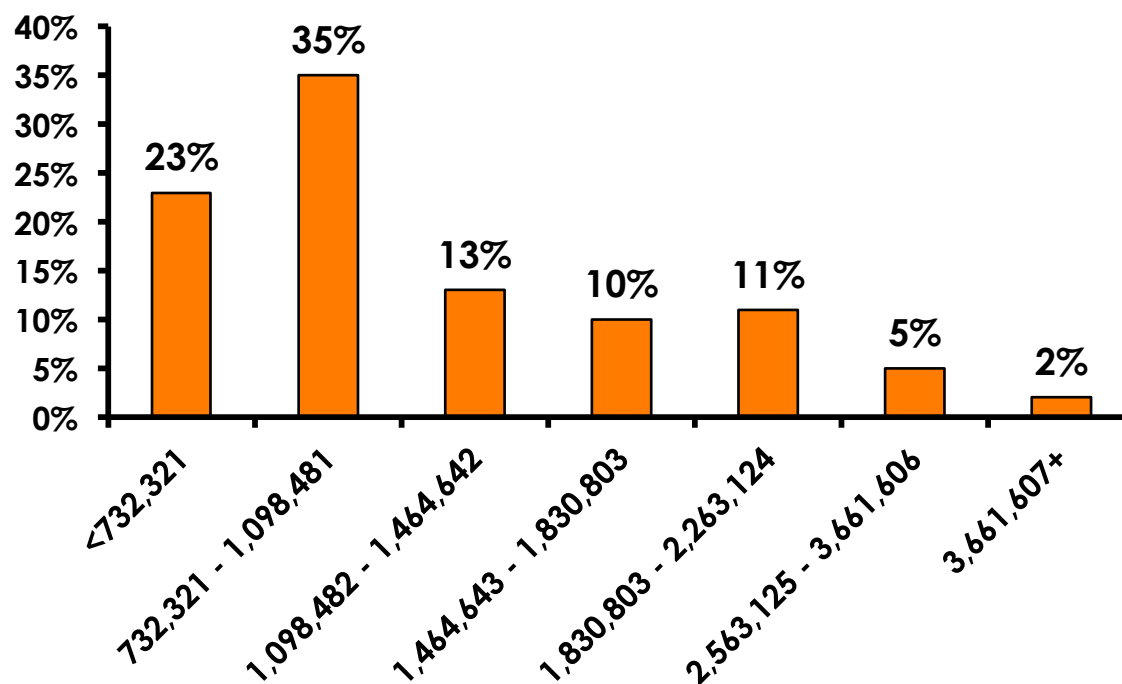
- The average age of the respondents is 43.75 years of age.

# Average Age



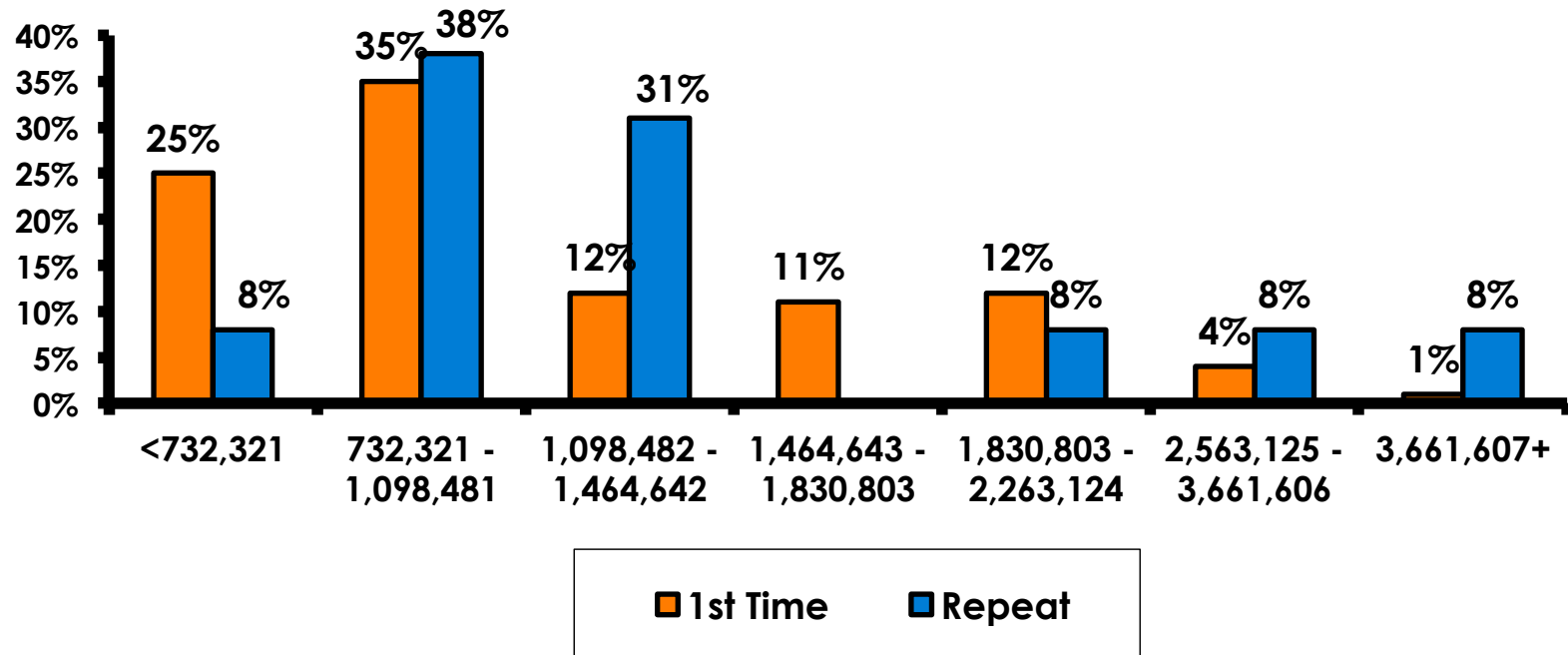


# Personal Income



- Ruble 32.48=  
\$1

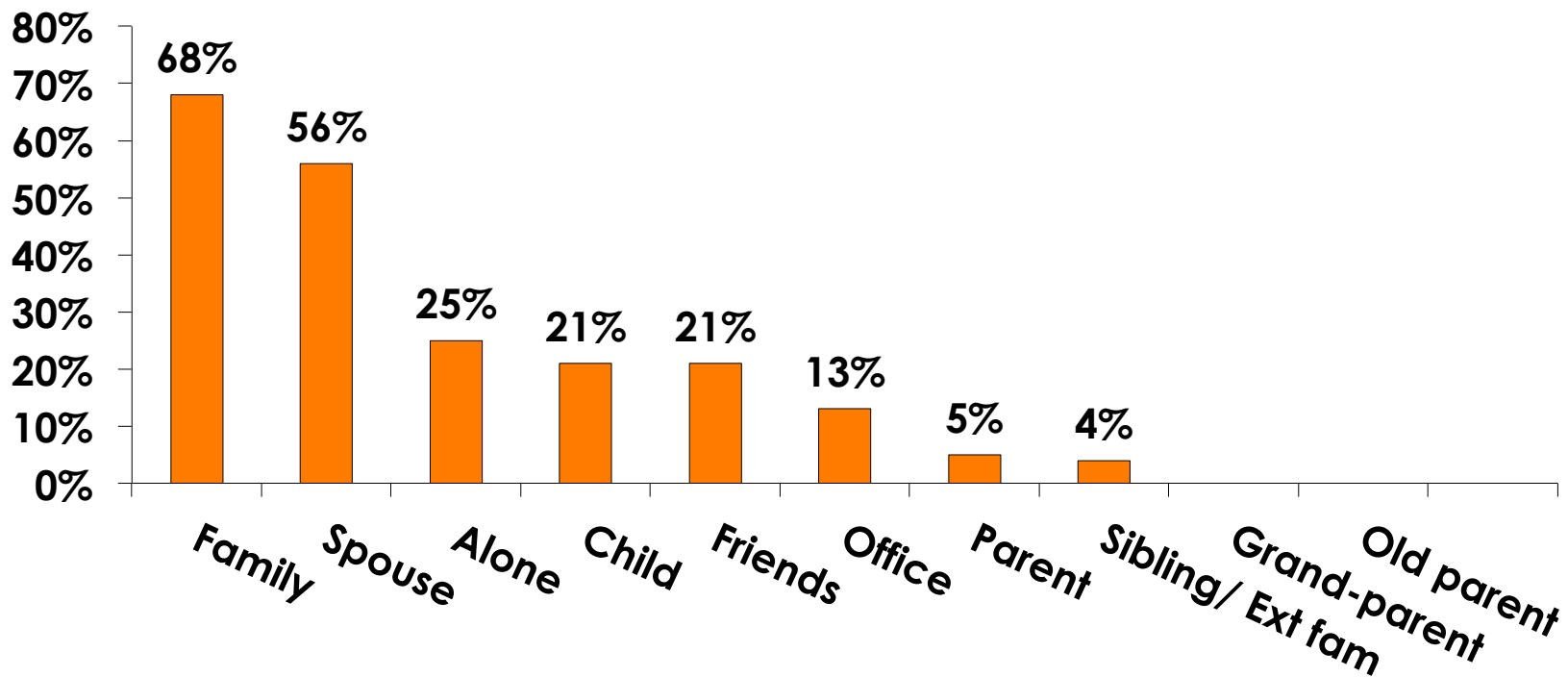
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q27	<732,321	Count	35	13	22	4	9	5	16
		Column N %	23%	17%	31%	67%	32%	8%	33%
	732,321-1,098,481	Count	52	27	25	1	11	26	12
		Column N %	35%	35%	35%	17%	39%	41%	25%
	1,098,482-1,464,642	Count	20	11	9	1	4	8	7
		Column N %	13%	14%	13%	17%	14%	13%	15%
	1,464,643-1,830,803	Count	15	10	5		2	7	6
		Column N %	10%	13%	7%		7%	11%	13%
	1,830,803-2,263,124	Count	17	10	7			10	6
		Column N %	11%	13%	10%			16%	13%
	2,563,125-3,661,606	Count	7	7			1	6	
		Column N %	5%	9%			4%	10%	
	3,661,607+	Count	3		3		1	1	1
		Column N %	2%		4%		4%	2%	2%
	No Income	Count							
		Column N %							

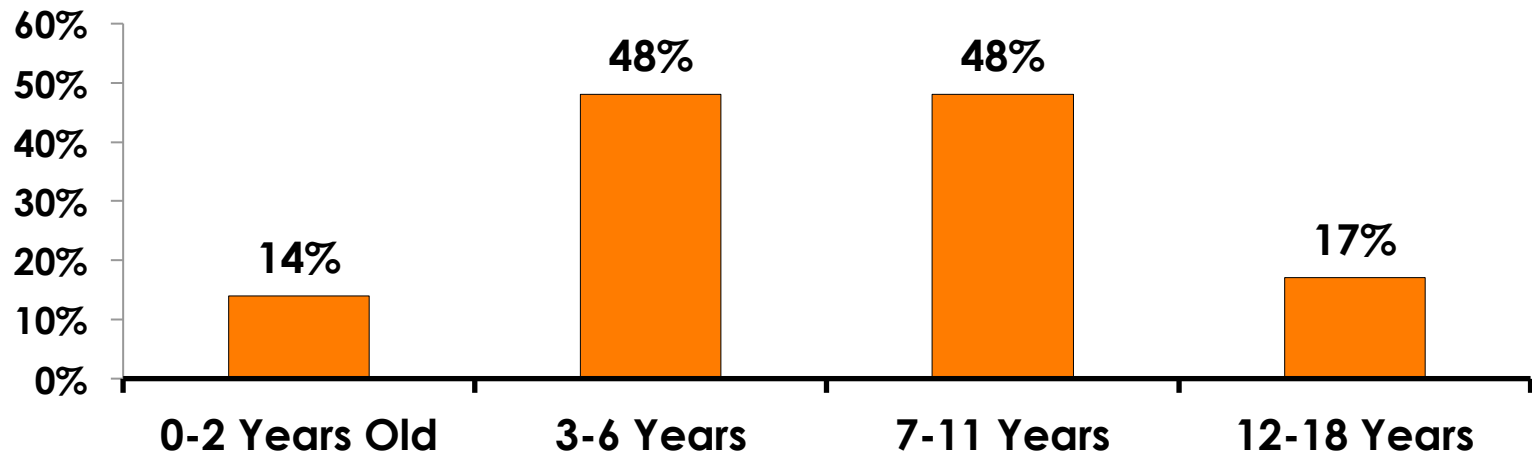
# Travel Companions



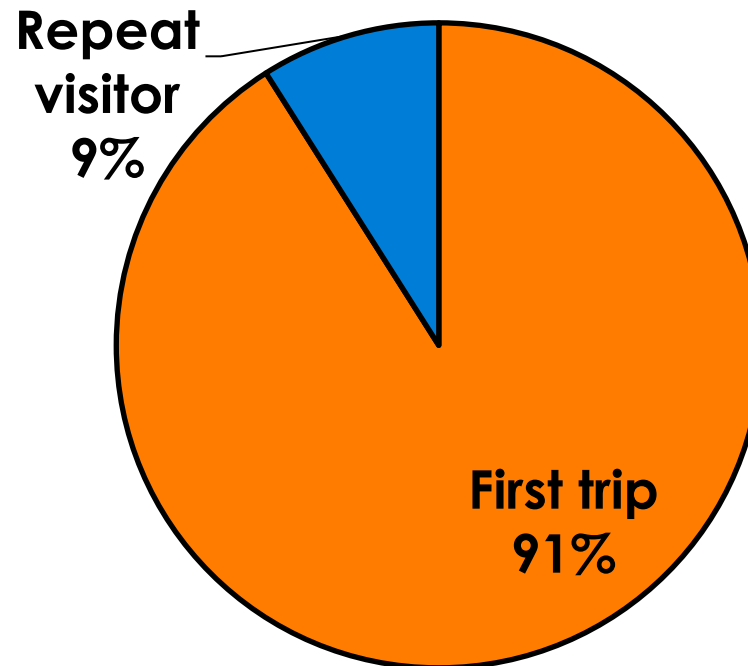
# Number of Children Travel Party

N=29 total respondents traveling with children.

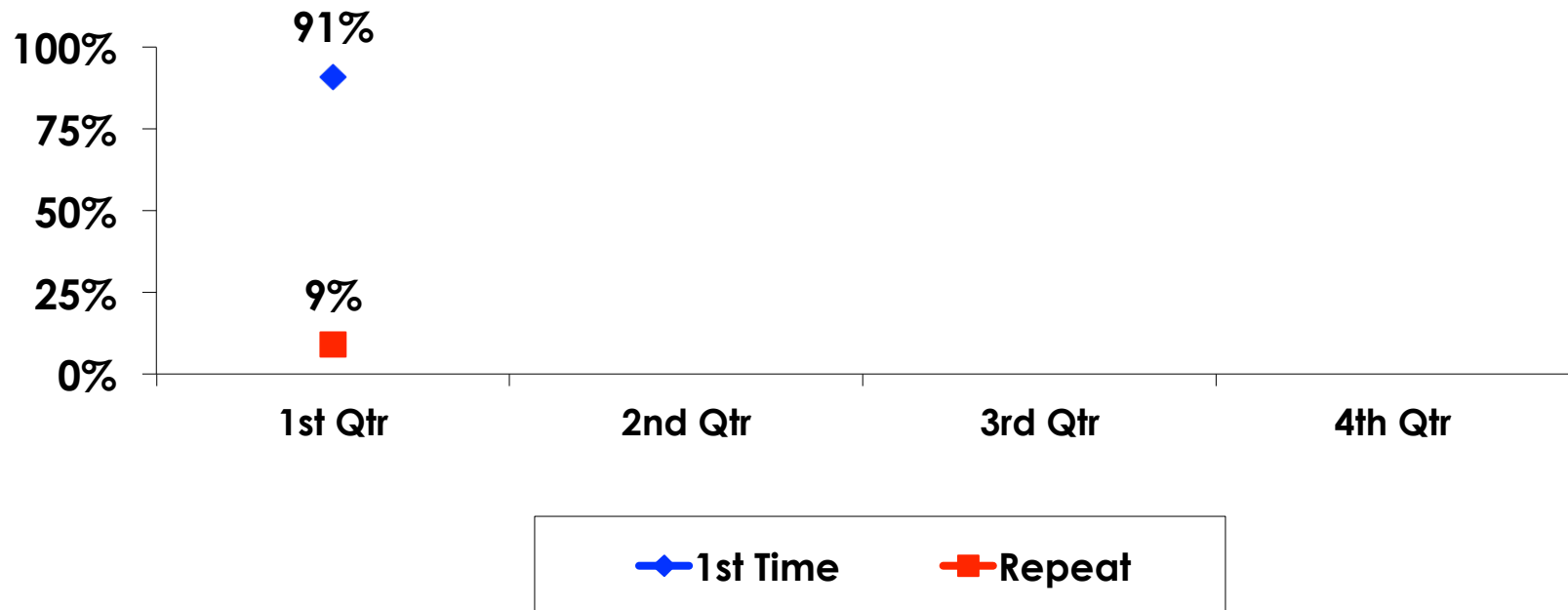
(Of those N=29 respondents, there is a total of 37 children 18 years or younger)



# Prior Trips to Guam



# Prior Trips to Guam



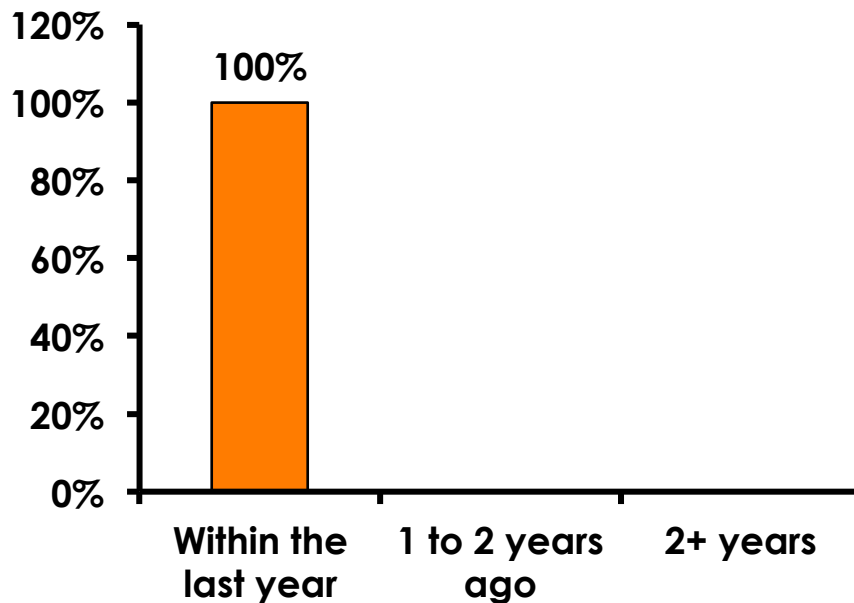
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	79	70	9
		Column N %	52%	51%	69%
	Female	Count	72	68	4
		Column N %	48%	49%	31%
AGE	Total	Count	151	138	13
	18-24	Count	6	6	
		Column N %	4%	4%	
	25-34	Count	29	25	4
		Column N %	20%	19%	33%
	35-49	Count	63	57	6
		Column N %	43%	42%	50%
	50+	Count	49	47	2
		Column N %	33%	35%	17%
	Total	Count	147	135	12



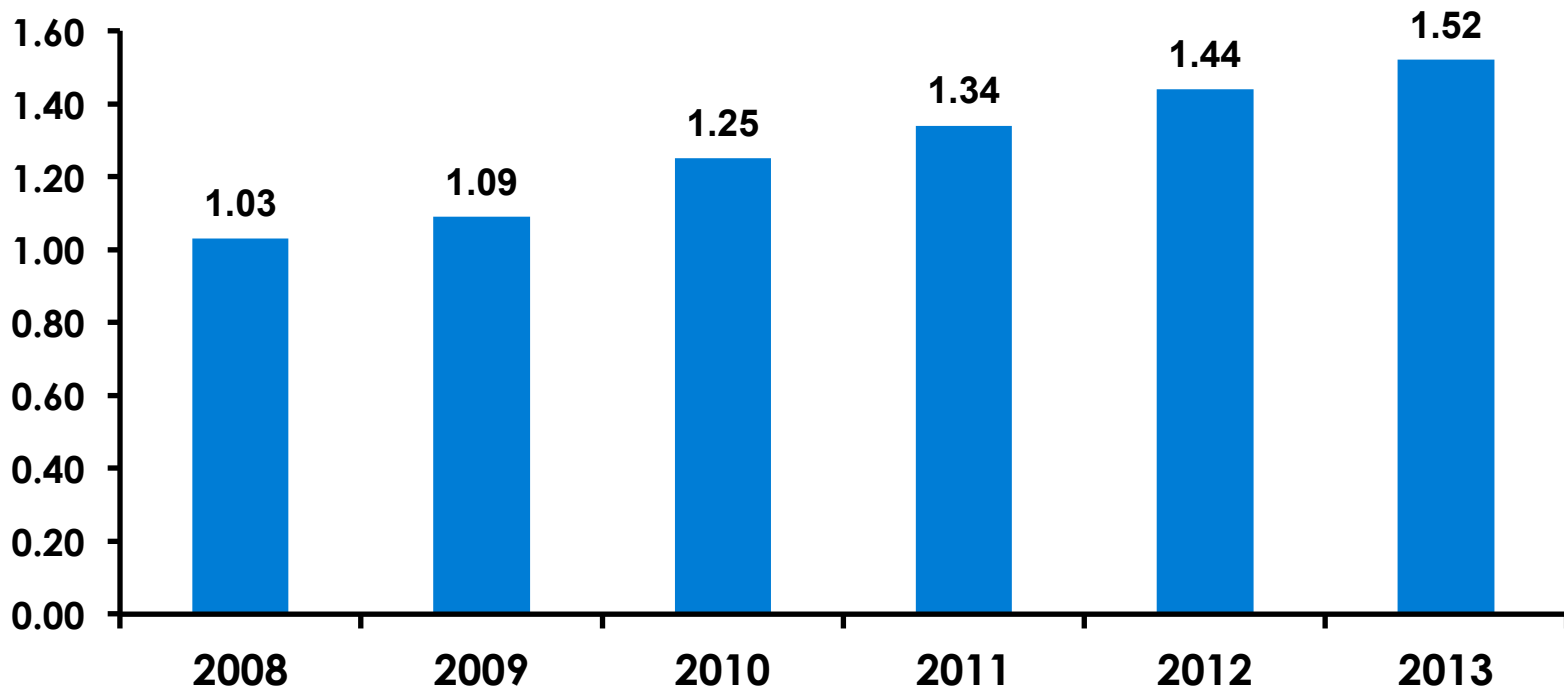
# Repeat Visitors Last Trip

n = 12



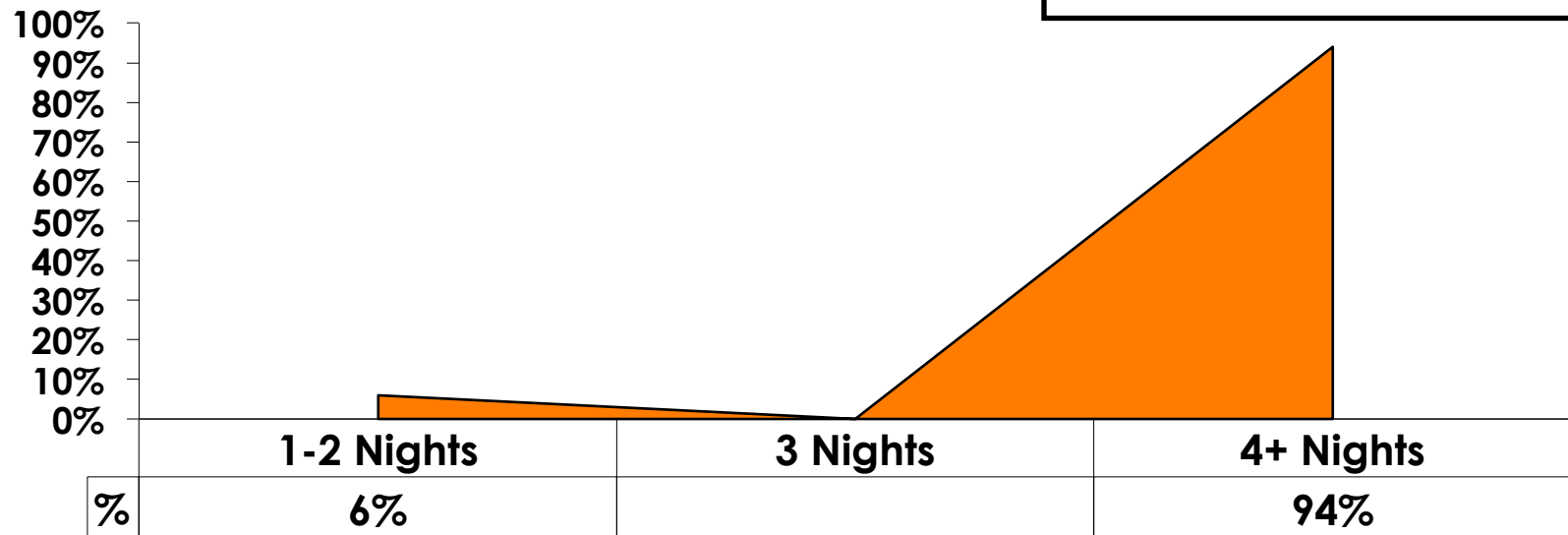
- The average repeat visitor has been to Guam 1.25 times.
- A majority of the repeat visitors have been to Guam within the last years.

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

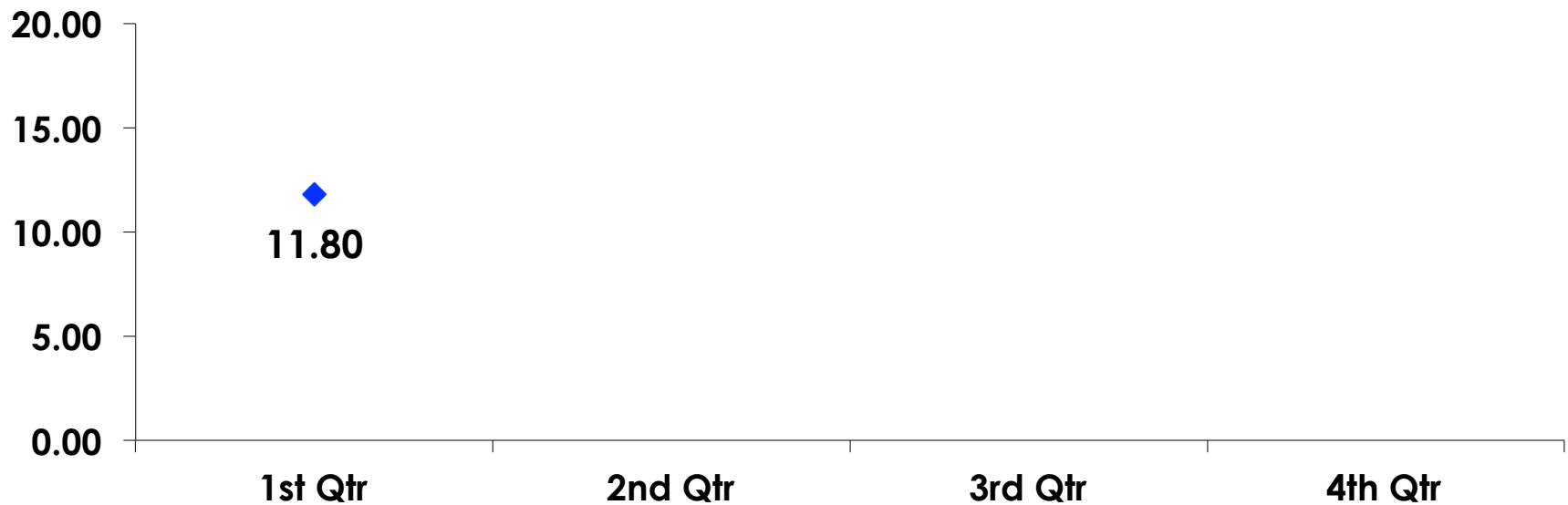


# Length of Stay

Mean = 11.80 Days  
Median = 14.0 Days



# Average Length of Stay

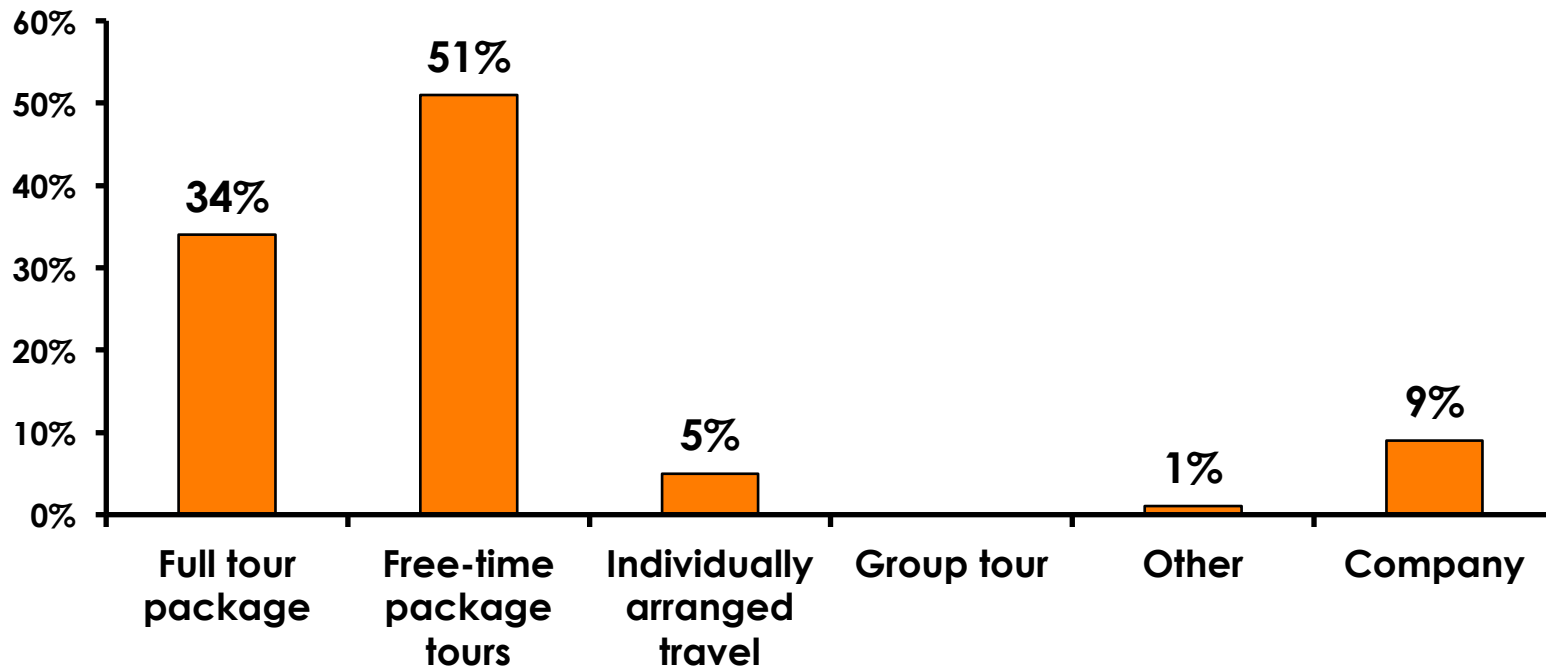


# Occupation by Income

		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	25%	3%	2%	30%	73%	69%	86%	33%	
	Professional/ Specialist	15%	9%	29%	15%		6%			
	Company: Office/ Non-Mgr	13%	23%	17%	10%					
	Company: Engineer	10%	9%	10%	30%	7%				
	Govt: Office/ Non-Mgr	7%	9%	15%						
	Company: Manager	7%		15%	15%					
	Company: Exec	7%	6%	4%		13%	19%	14%		
	Retired	5%	20%							
	Homemaker	3%	3%	2%			6%		67%	
	Govt: Executive	2%	3%	2%		7%				
	Student	1%	6%							
	Teacher	1%	3%	2%						
	Company: Salesperson	1%	6%							
	Other	1%		2%						
	Skilled worker	1%	3%							
	Total	Count	150	35	52	20	15	16	7	3

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



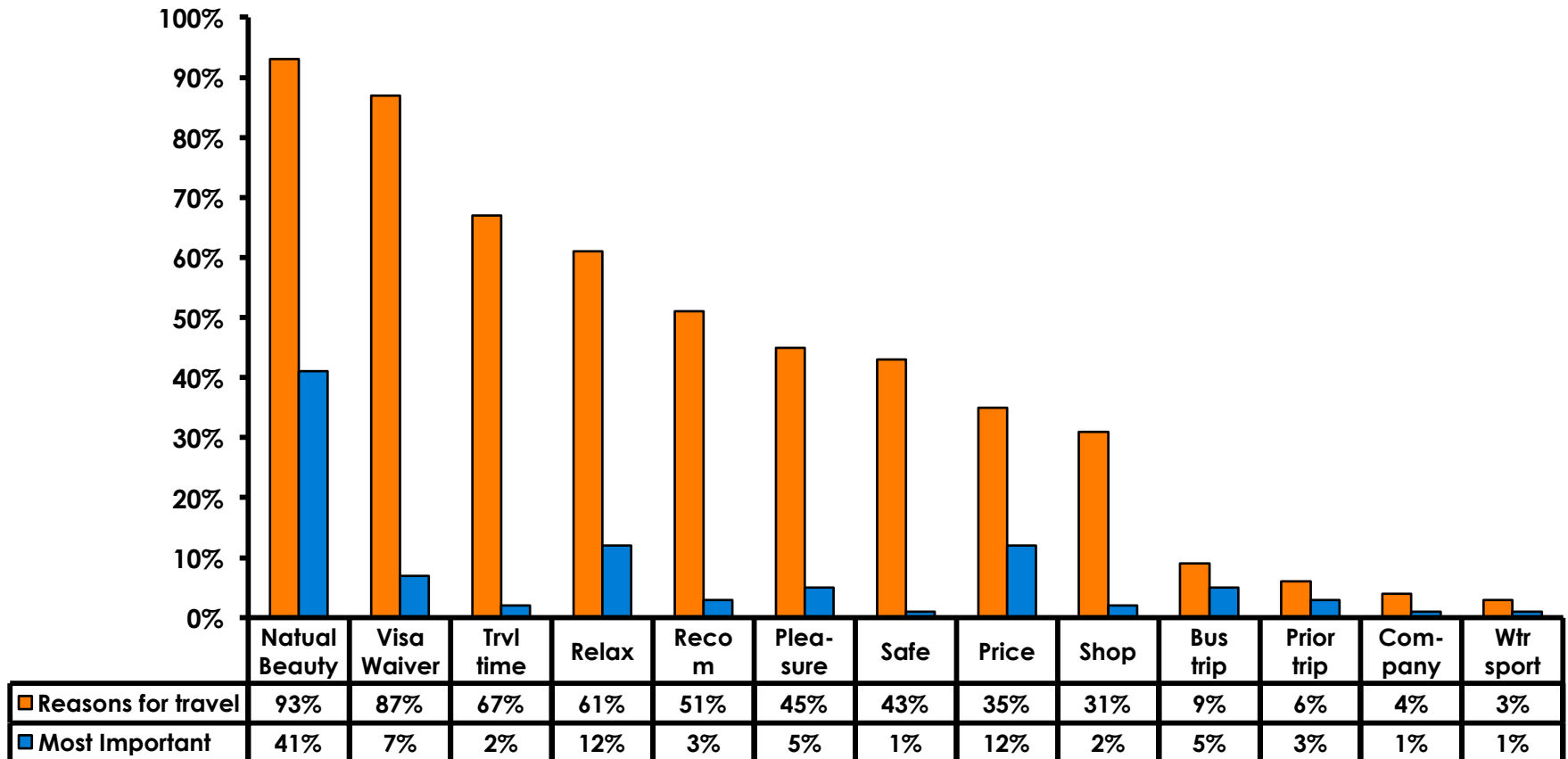
# Accommodation by Income

Average length of stay: 11.80 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	Fiesta Resort Guam	17%	18%	17%	20%	20%	18%			
	Hyatt Regency Guam	17%	15%	10%	20%	13%	29%	43%	33%	
	Westin Resort Guam	13%	9%	6%	25%	20%	18%	29%		
	Guam Reef & Olive Spa	13%	15%	21%	5%	13%				
	Bayview Hotel	11%	32%	6%	10%					
	PIC Club	8%	6%	8%	5%	7%	12%		67%	
	Hotel Nikko Guam	6%		10%	10%	7%	6%			
	Outrigger Guam Resort	4%		6%		7%		14%		
	Hilton Guam Resort	2%		2%		7%	6%			
	Onward Beach Resort	2%		2%		7%		14%		
	Guam Plaza Hotel	2%	3%	2%			6%			
	Holiday Resort Guam	2%		4%	5%					
	Verona Resort & Spa	1%		4%						
	Tumon Bay Capital Hotel	1%	3%	2%						
	Sheraton Laguna Guam	1%		2%			6%			
	Total Count	150	34	52	20	15	17	7	3	



# Travel Motivation - Top Responses



# Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Relaxation and
- Price

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%	97%	92%	94%	97%	89%
	No Visa required	87%	83%	93%	90%	81%	94%	81%
	Short travel time	67%	33%	66%	71%	69%	76%	58%
	Relax	61%	83%	55%	62%	60%	64%	58%
	Recomm- friend/family/trvl agnt	51%	50%	55%	51%	48%	54%	49%
	Pleasure	45%	33%	59%	44%	42%	55%	35%
	Safe	43%	17%	52%	43%	44%	46%	40%
	Price	35%	17%	45%	32%	38%	36%	35%
	Shopping	31%	67%	34%	29%	25%	29%	32%
	Company/ Business Trip	9%	17%		14%	6%	5%	14%
	Previous trip	6%		7%	6%	4%	8%	4%
	Other	5%	17%	7%	2%	6%	6%	3%
	Company Sponsored	4%			6%	4%	4%	4%
	Water sports	3%	33%		3%		3%	3%
	Scuba	3%	17%	3%	3%		4%	1%
	Visit friends/ Relatives	3%		7%		2%	1%	4%
	Organized sports	2%		3%		4%	1%	3%
	Total	Count	150	6	29	63	48	78

# Motivation by Income

		TOTAL	Q27							
		-	<732,321	732,321-1,098,481	1,098,482-1,464,642	1,464,643-1,830,803	1,830,803-2,263,124	2,263,125-3,661,606	3,661,607+	No Income
Q5A	Natural beauty	93%	97%	96%	90%	93%	88%	100%	33%	
	No Visa required	87%	86%	94%	80%	80%	88%	100%	33%	
	Short travel time	67%	60%	75%	55%	73%	71%	71%	67%	
	Relax	61%	66%	67%	75%	60%	41%	43%		
	Recomm- friend/family/trvl agnt	51%	49%	67%	30%	53%	47%	29%	67%	
	Pleasure	45%	43%	51%	35%	53%	41%	57%		
	Safe	43%	31%	53%	45%	47%	41%	43%		
	Price	35%	57%	41%	15%	20%	18%	14%		
	Shopping	31%	29%	37%	40%	20%	24%	14%		
	Company/ Business Trip	9%	11%	8%	10%	13%	12%			
	Previous trip	6%	3%	8%	10%		6%		33%	
	Other	5%	9%	2%	5%			14%	33%	
	Company Sponsored	4%	3%	2%	5%		12%	14%		
	Water sports	3%	9%				6%			
	Scuba	3%		2%	5%	7%	6%			
	Visit friends/ Relatives	3%	3%	4%			6%			
	Organized sports	2%		2%	5%		6%			
	Total	Count	150	35	51	20	15	17	7	3

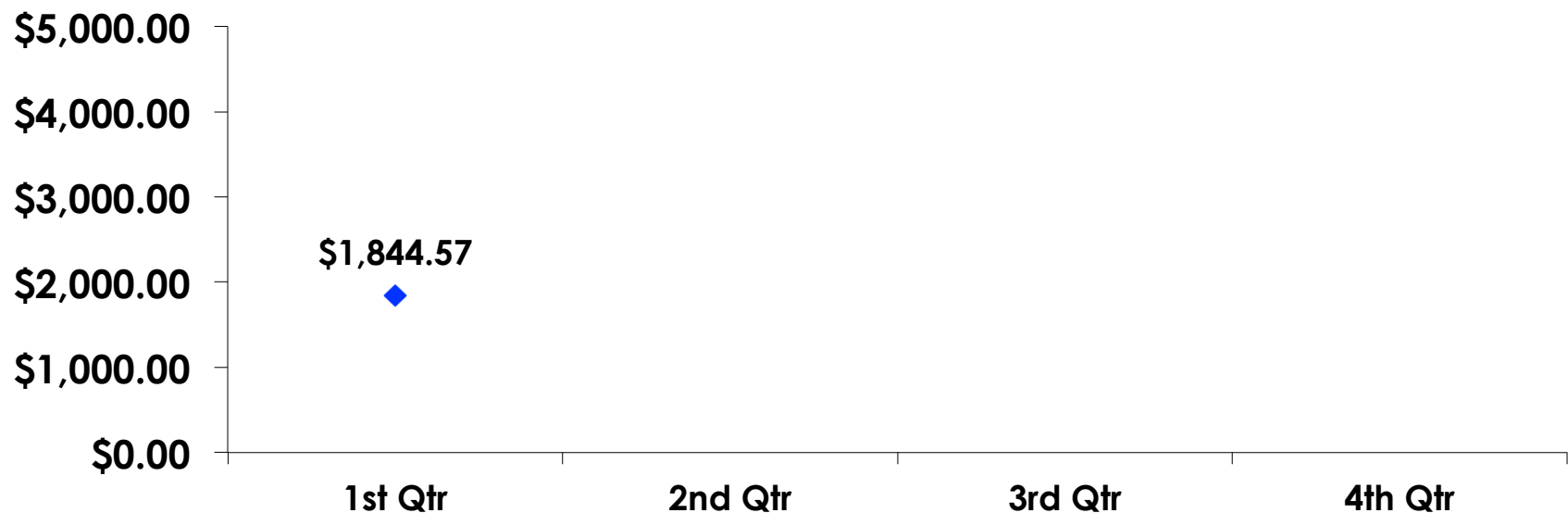
# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures

Ruble 32.48 /US\$1

- \$3,515.38 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$10,776 = maximum (highest amount recorded for the entire sample)
- \$1,844.57 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person



YTD=\$1,844.57

# Breakdown of Prepaid Expenditures

## Rub 32.48=\$1

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

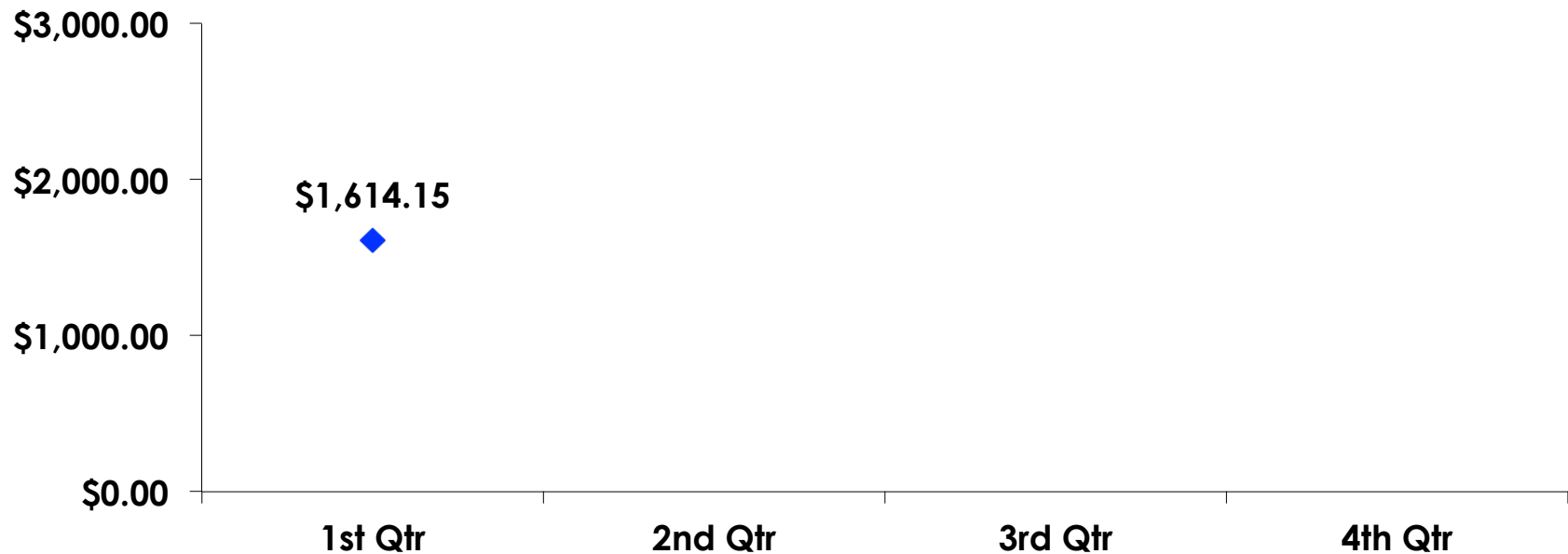
	MEAN \$
Air & Accommodation package only	\$3,702.77
Air & Accommodation w/ daily meal package	\$4,413.03
Air only	\$-
Accommodation only	\$-
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation – Russia	\$-
Ground transportation – Guam	\$-
Optional tours/ activities	\$-
Other expenses	\$-
<b>Total Prepaid</b>	<b>\$3,515.38</b>



# On-Island Expenditures

- \$2,714.77 = overall mean average on-island expense (for entire travel party size) by respondent
- \$450 = Minimum (lowest amount recorded for the entire sample)
- \$10,000 = Maximum (highest amount recorded for the entire sample)
- \$1,614.15 = overall mean average per person on-island expenditure

# On-Island Expenditures Per Person



YTD = \$1,614.15

# Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
					AGE				AGE			
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
ONISLE	Mean	\$1,614.15	\$1,535.17	\$1,700.80	\$1,108.00	\$1,340.89	\$1,685.54	\$1,471.73	\$1,537.50	\$2,279.06	\$1,480.06	\$1,486.96
	Median	\$1,440	\$1,272	\$1,490	\$1,108	\$1,100	\$1,515	\$1,072	\$1,350	\$2,000	\$1,390	\$1,600
	Minimum	\$250	\$267	\$250	\$766	\$450	\$267	\$500	\$450	\$393	\$467	\$250
	Maximum	\$6,000	\$4,100	\$6,000	\$1,450	\$2,800	\$4,000	\$4,100	\$3,000	\$6,000	\$3,000	\$3,000

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$230.63	\$274.68	\$182.29	\$0.00	\$205.17	\$246.98	\$216.63
	Median	\$100	\$200	\$15	\$0	\$100	\$150	\$50
F&B FF/STORE	Mean	\$65.89	\$53.54	\$79.44	\$90.00	\$35.86	\$66.03	\$84.90
	Median	\$0	\$0	\$0	\$60	\$0	\$0	\$0
F&B RESTRNT	Mean	\$433.44	\$431.01	\$436.11	\$458.33	\$510.69	\$445.87	\$363.27
	Median	\$350	\$400	\$300	\$250	\$400	\$350	\$300
OPT TOUR	Mean	\$327.13	\$339.25	\$313.83	\$494.33	\$341.55	\$337.32	\$292.14
	Median	\$300	\$300	\$240	\$233	\$300	\$300	\$290
GIFT- SELF	Mean	\$955.83	\$1,058.23	\$843.47	\$466.67	\$1,184.48	\$1,053.49	\$780.82
	Median	\$500	\$550	\$500	\$500	\$500	\$600	\$500
GIFT- OTHER	Mean	\$372.25	\$339.37	\$408.32	\$200.00	\$365.52	\$370.70	\$379.69
	Median	\$270	\$300	\$237	\$200	\$250	\$250	\$300
TRANS	Mean	\$113.91	\$136.58	\$89.03	\$55.00	\$94.83	\$143.49	\$93.47
	Median	\$60	\$100	\$45	\$40	\$50	\$100	\$30
OTHER	Mean	\$191.92	\$96.46	\$296.67	\$116.67	\$79.31	\$138.41	\$191.22
	Median	\$100	\$100	\$50	\$0	\$100	\$100	\$0
TOTAL	Mean	\$2,714.77	\$2,752.29	\$2,673.61	\$1,894.33	\$2,846.72	\$2,857.54	\$2,405.82
	Median	\$2,200	\$2,450	\$2,000	\$1,225	\$2,500	\$2,300	\$2,000

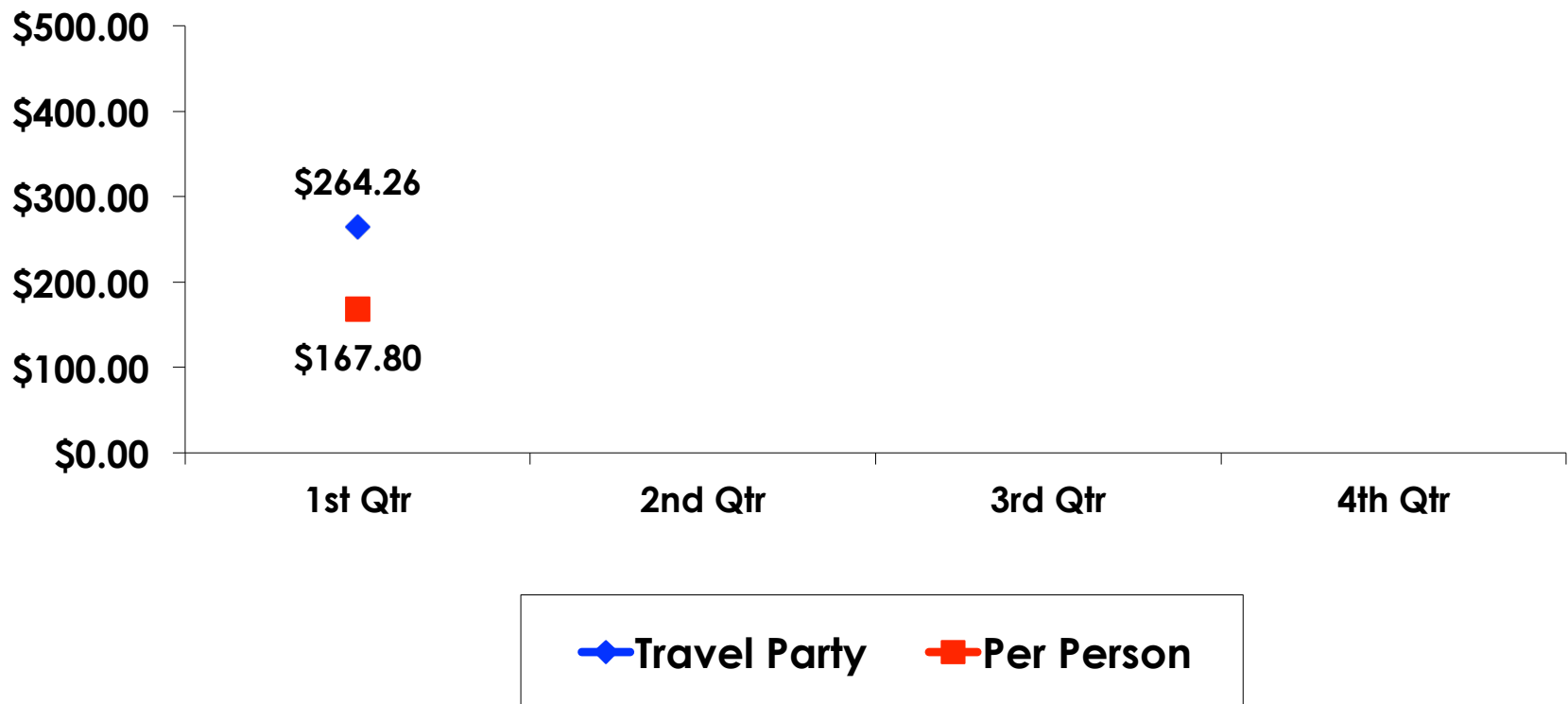
# On-Island Expenditures

## First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$230.63	\$229.17	\$246.15
	Median	\$100	\$100	\$100
F&B FF/STORE	Mean	\$65.89	\$71.38	\$7.69
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$433.44	\$433.33	\$434.62
	Median	\$350	\$350	\$400
OPT TOUR	Mean	\$327.13	\$327.22	\$326.15
	Median	\$300	\$300	\$400
GIFT- SELF	Mean	\$955.83	\$944.06	\$1,080.77
	Median	\$500	\$500	\$500
GIFT- OTHER	Mean	\$372.25	\$353.69	\$569.23
	Median	\$270	\$260	\$300
TRANS	Mean	\$113.91	\$110.72	\$147.69
	Median	\$60	\$50	\$100
OTHER	Mean	\$191.92	\$197.25	\$135.38
	Median	\$100	\$50	\$100
TOTAL	Mean	\$2,714.77	\$2,696.46	\$2,909.23
	Median	\$2,200	\$2,145	\$3,200

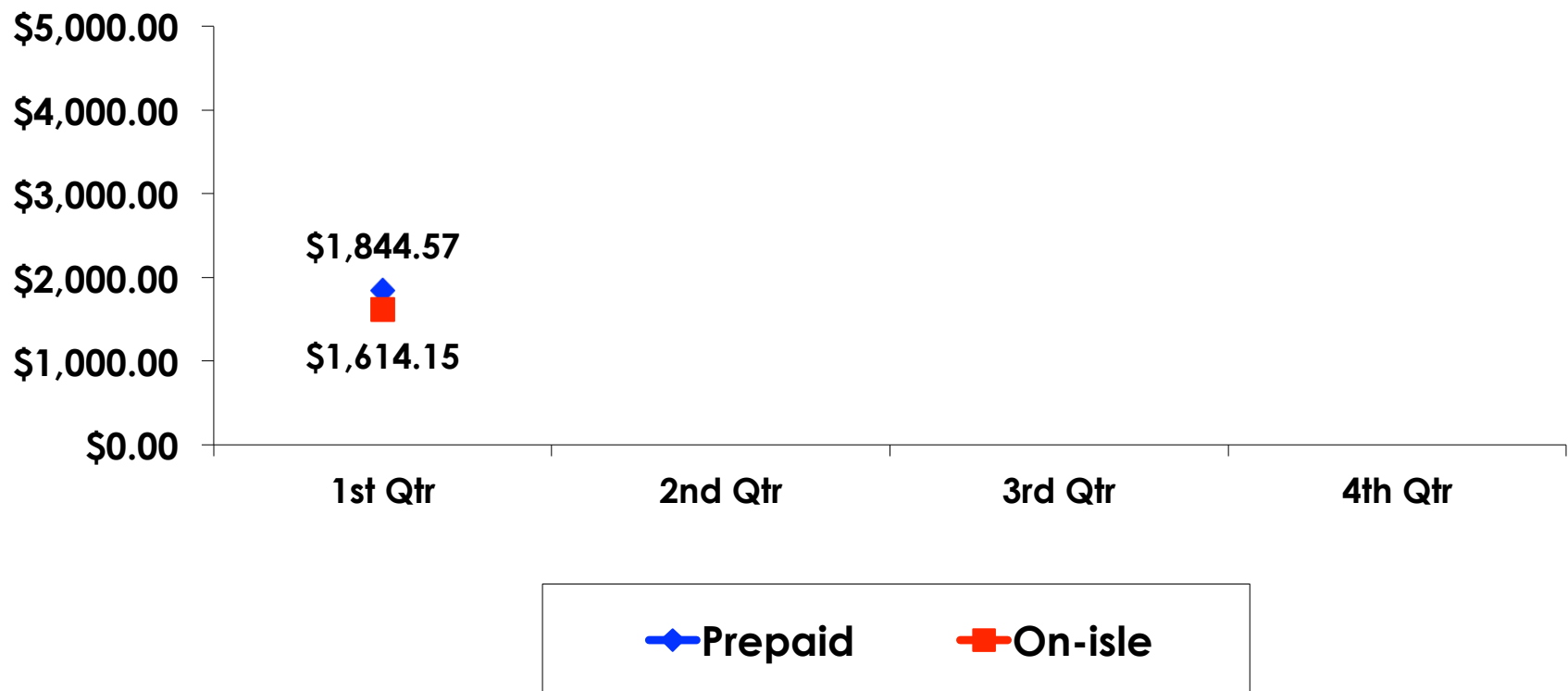
# On-Island Expenditures Per Day

Travel Party YTD = \$264.26      Per Person YTD = \$167.80



# Prepaid/On-Island Expenditures Per Person

Prepaid YTD = \$1,844.57      On-Island YTD = \$1,614.15



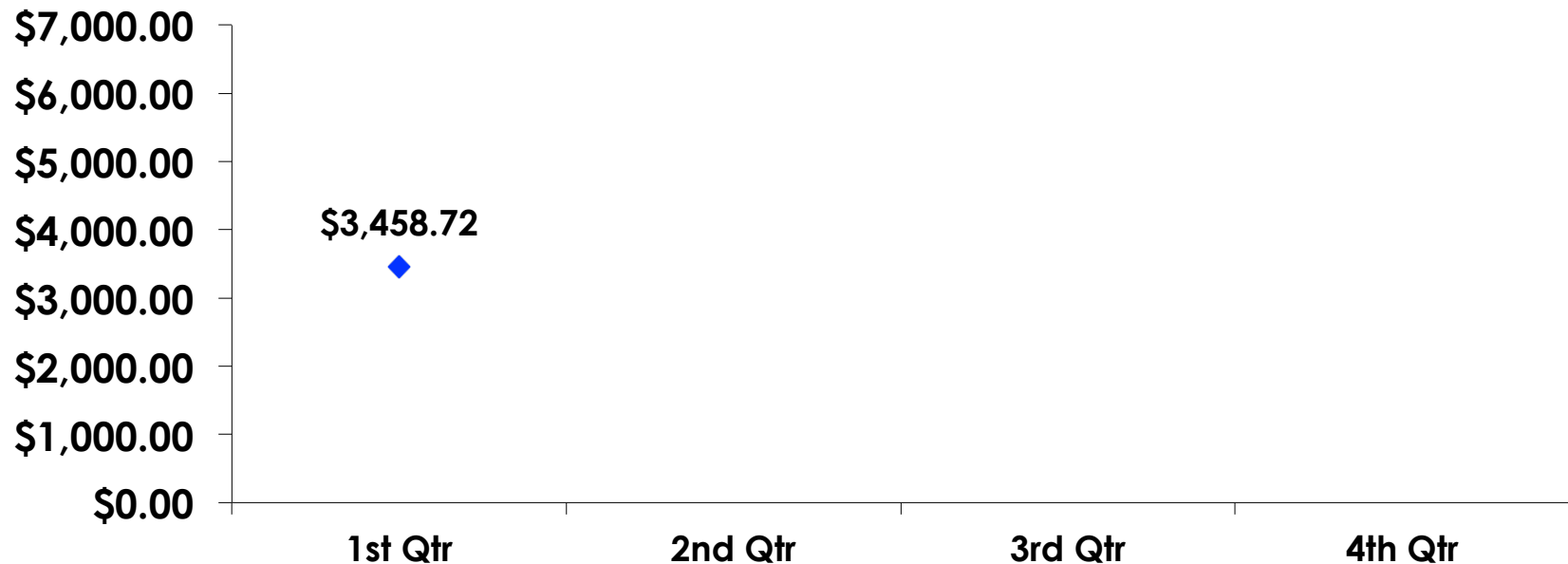
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# **Total Expenditures Per Person (Prepaid & On-Island)**

- \$3,458.72 = overall average
- \$450 = Minimum (lowest amount recorded for the entire sample)
- \$9,002 = Maximum (highest amount recorded for the entire sample)



# Total Expenditures Per Person



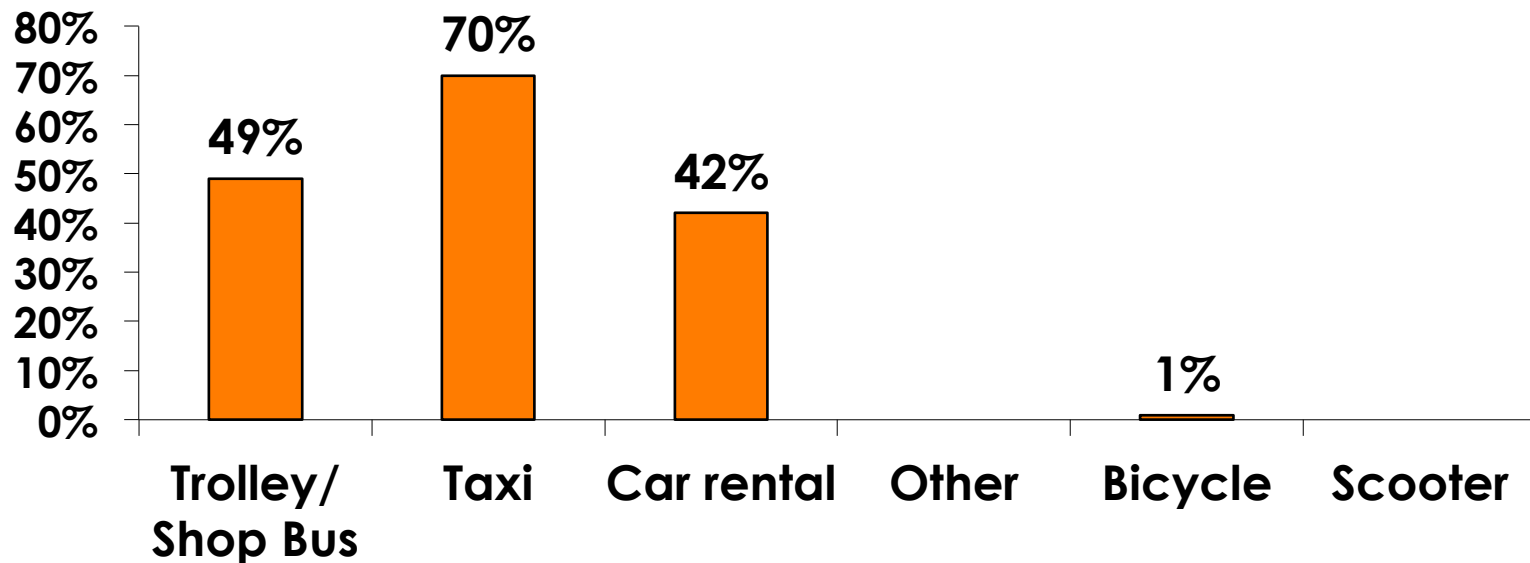
YTD=\$3,458.72

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$230.63
Food & beverage in fast food restaurant/ convenience store	\$65.89
Food & beverage at restaurants or drinking establishments outside a hotel	\$433.44
Optional tours and activities	\$327.13
Gifts/ souvenirs for yourself/companions	\$955.83
Gifts/ souvenirs for friends/family at home	\$372.25
Local transportation	\$113.91
Other expenses not covered	\$191.92
<b>Average Total</b>	<b>\$2,714.77</b>

# Local Transportation

n=79



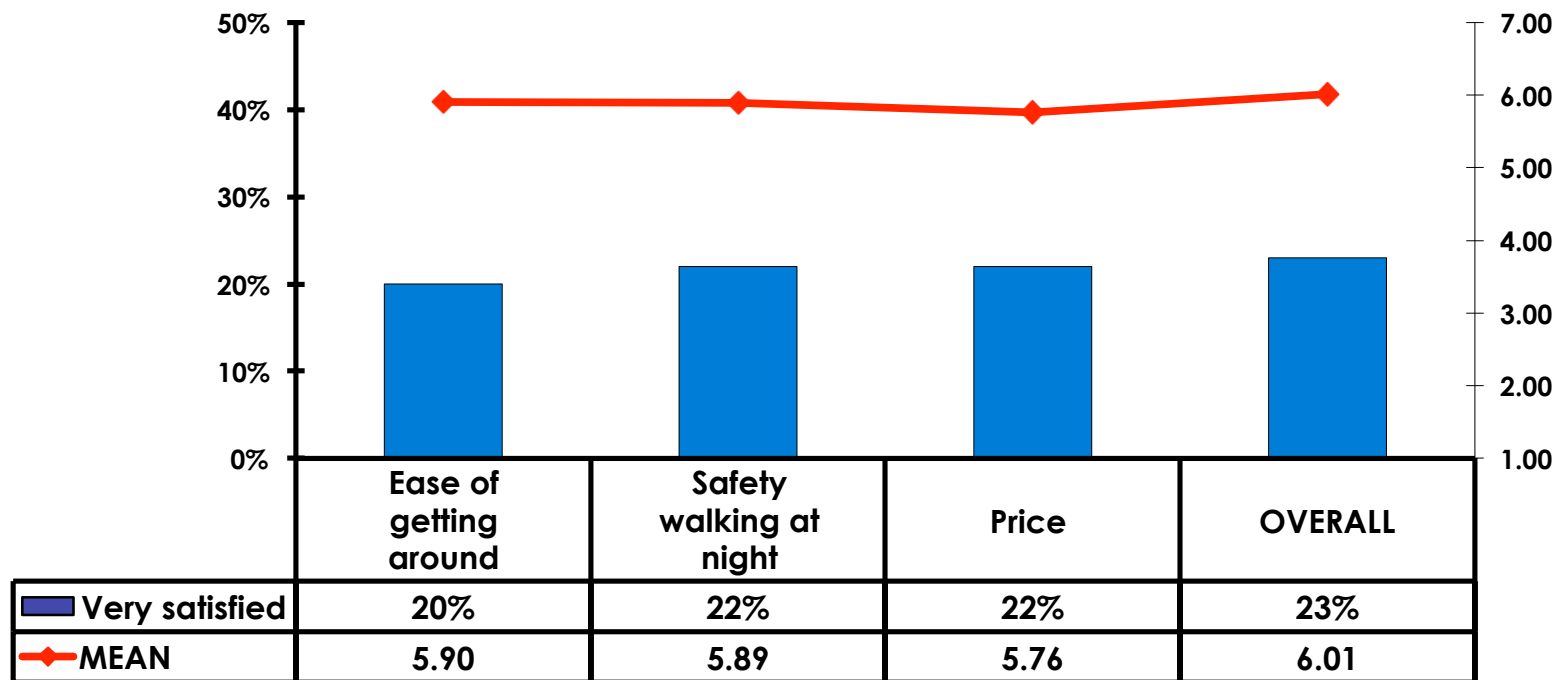
Mean=\$113.91 per travel party

# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

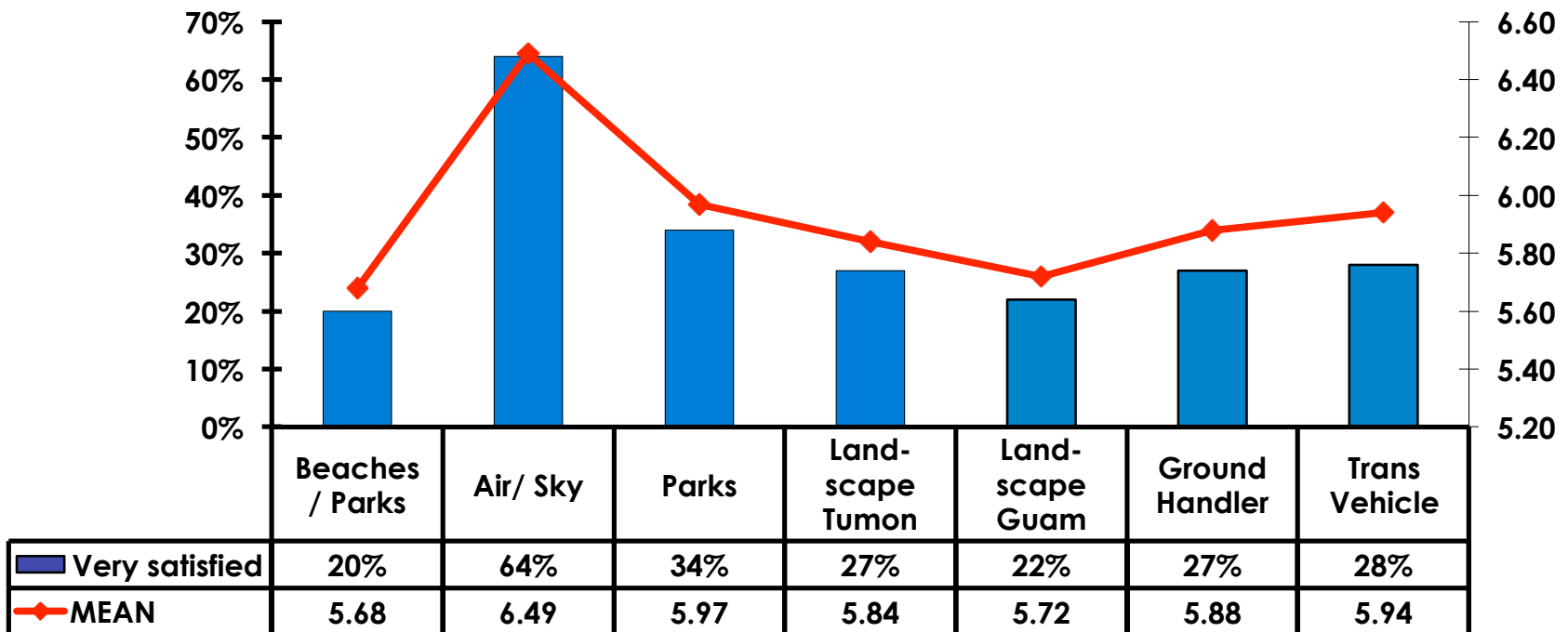
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

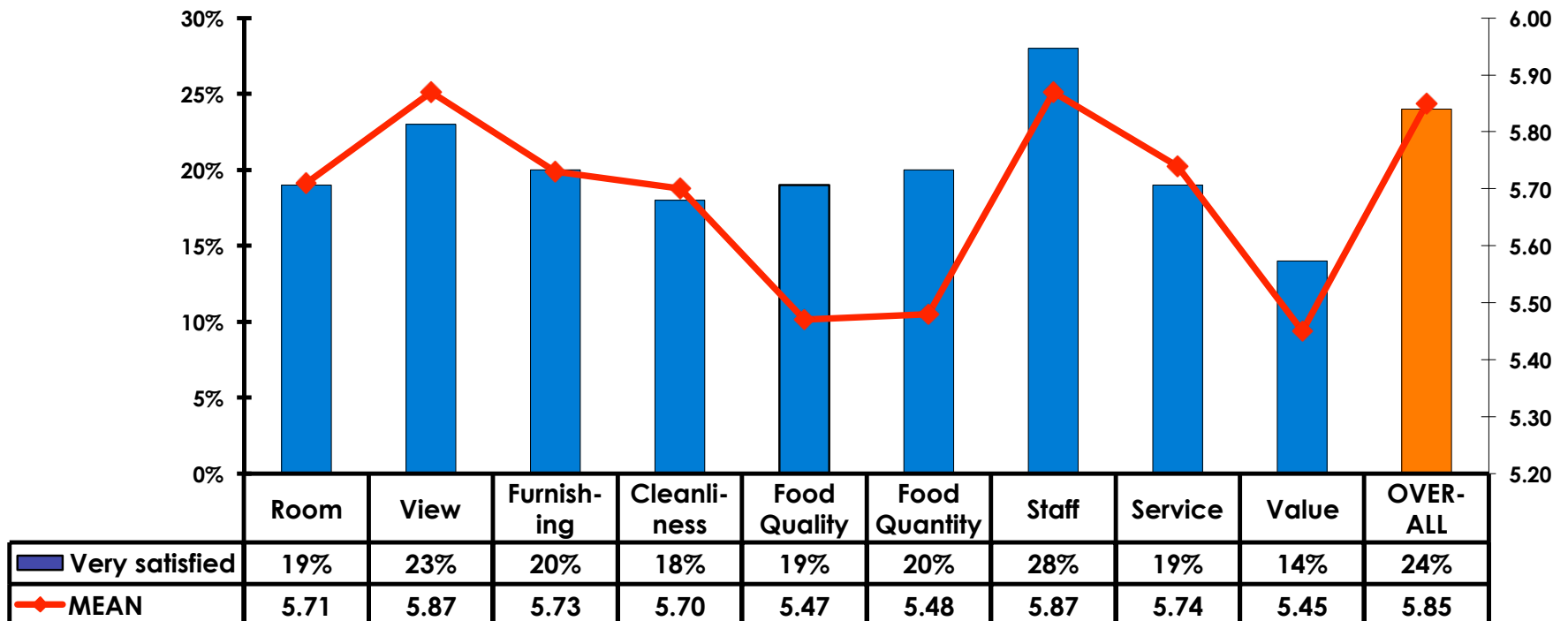
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

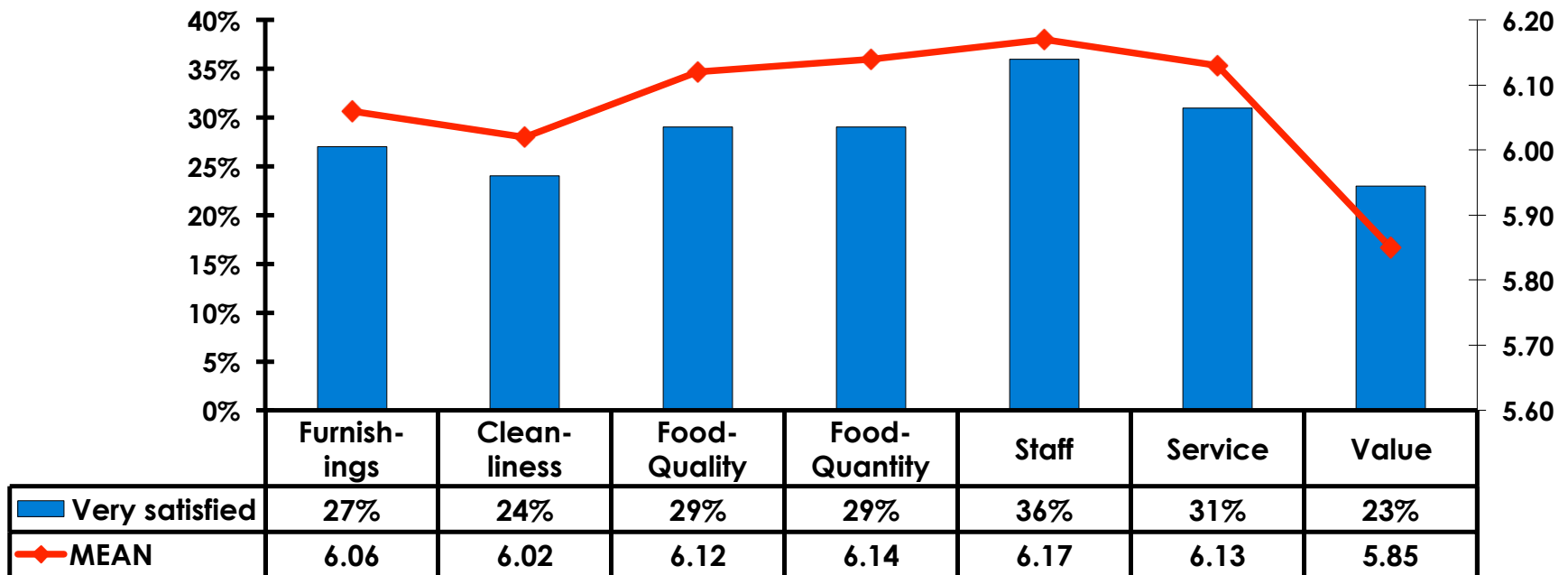
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

7pt Rating Scale

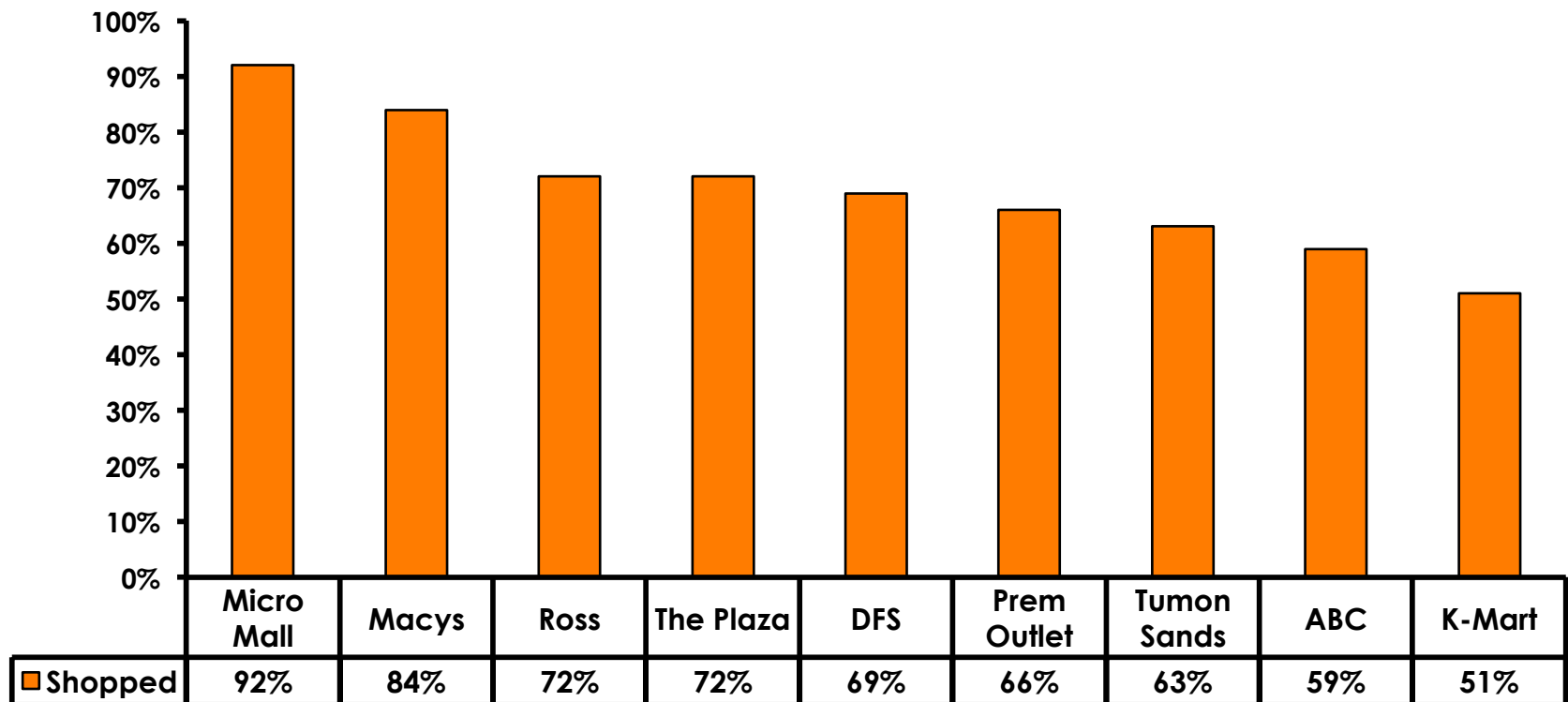
7=Very Satisfied/1=Very Dissatisfied





# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

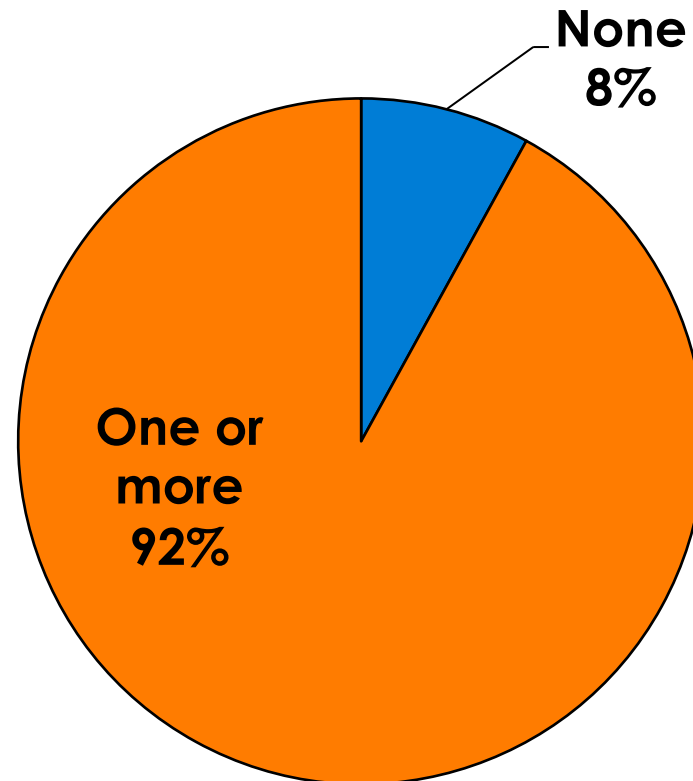
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>76%</b>	Score of 6 to 7 = <b>69%</b>
Score of 4 to 5 = <b>24%</b>	Score of 4 to 5 = <b>29%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>2%</b>
<b>MEAN = 5.99</b>	<b>MEAN = 5.88</b>

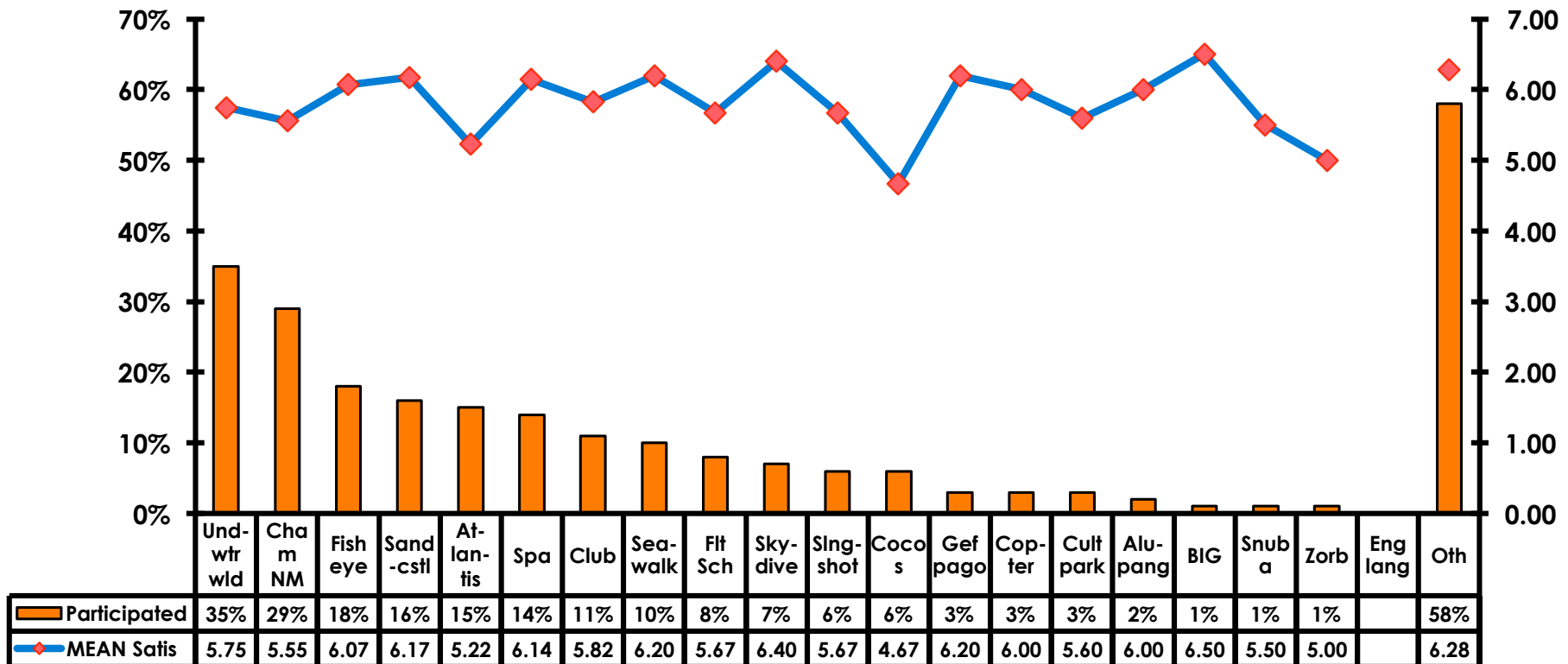
# Optional Tour Participation

- Average number of tours participated in is 2.92



# 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>69%</b>	Score of 6 to 7 = <b>35%</b>
Score of 4 to 5 = <b>29%</b>	Score of 4 to 5 = <b>67%</b>
Score 1 to 3 = <b>2%</b>	Score 1 to 3 = <b>8%</b>
<b>MEAN = 5.92</b>	<b>MEAN = 4.92</b>

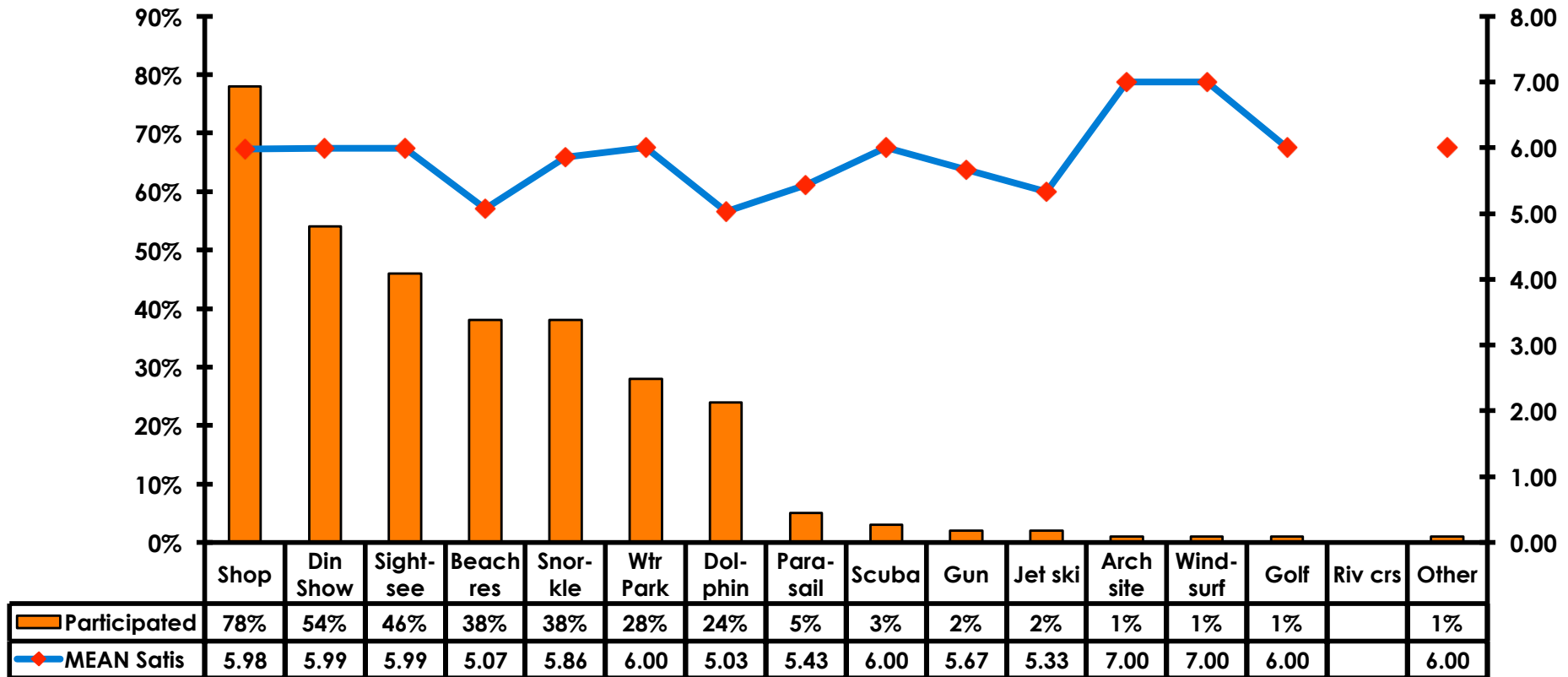
# Night Tours Satisfaction

7pt Rating Scale

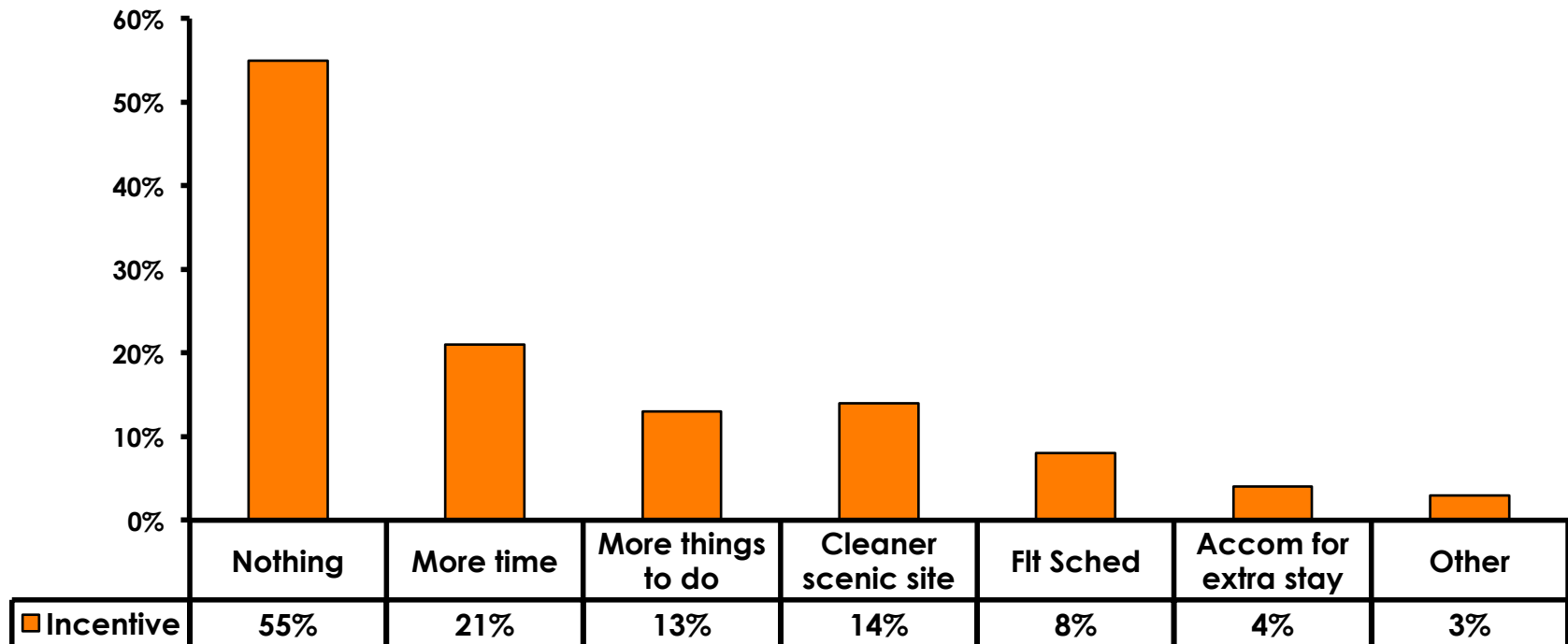
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>29%</b>	Score of 6 to 7 = <b>30%</b>
Score of 4 to 5 = <b>65%</b>	Score of 4 to 5 = <b>56%</b>
Score 1 to 3 = <b>7%</b>	Score 1 to 3 = <b>15%</b>
<b>MEAN = 4.95</b>	<b>MEAN = 4.75</b>

# Satisfaction with Other Activities



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

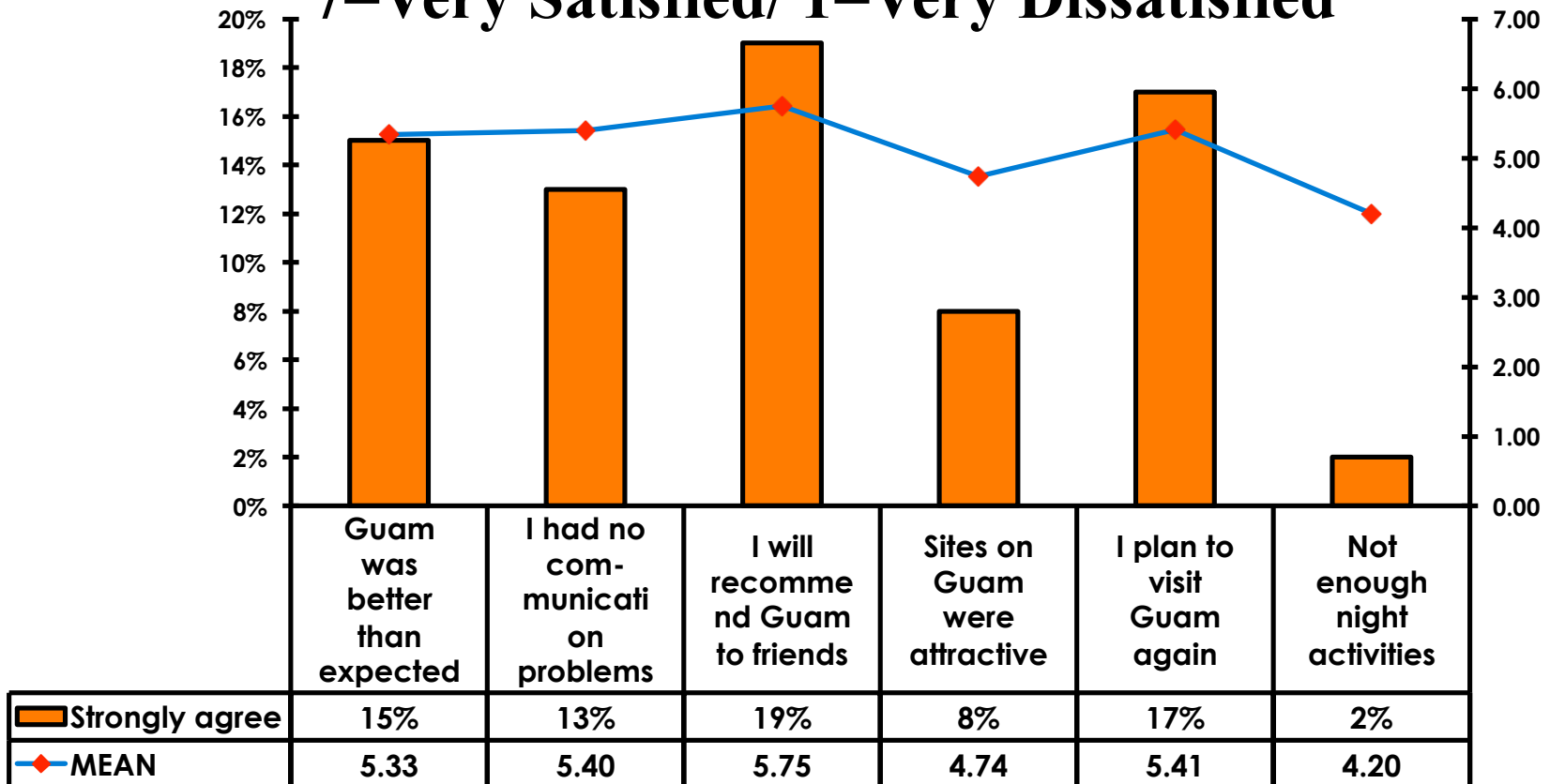




# On-Island Perceptions

7pt Rating Scale

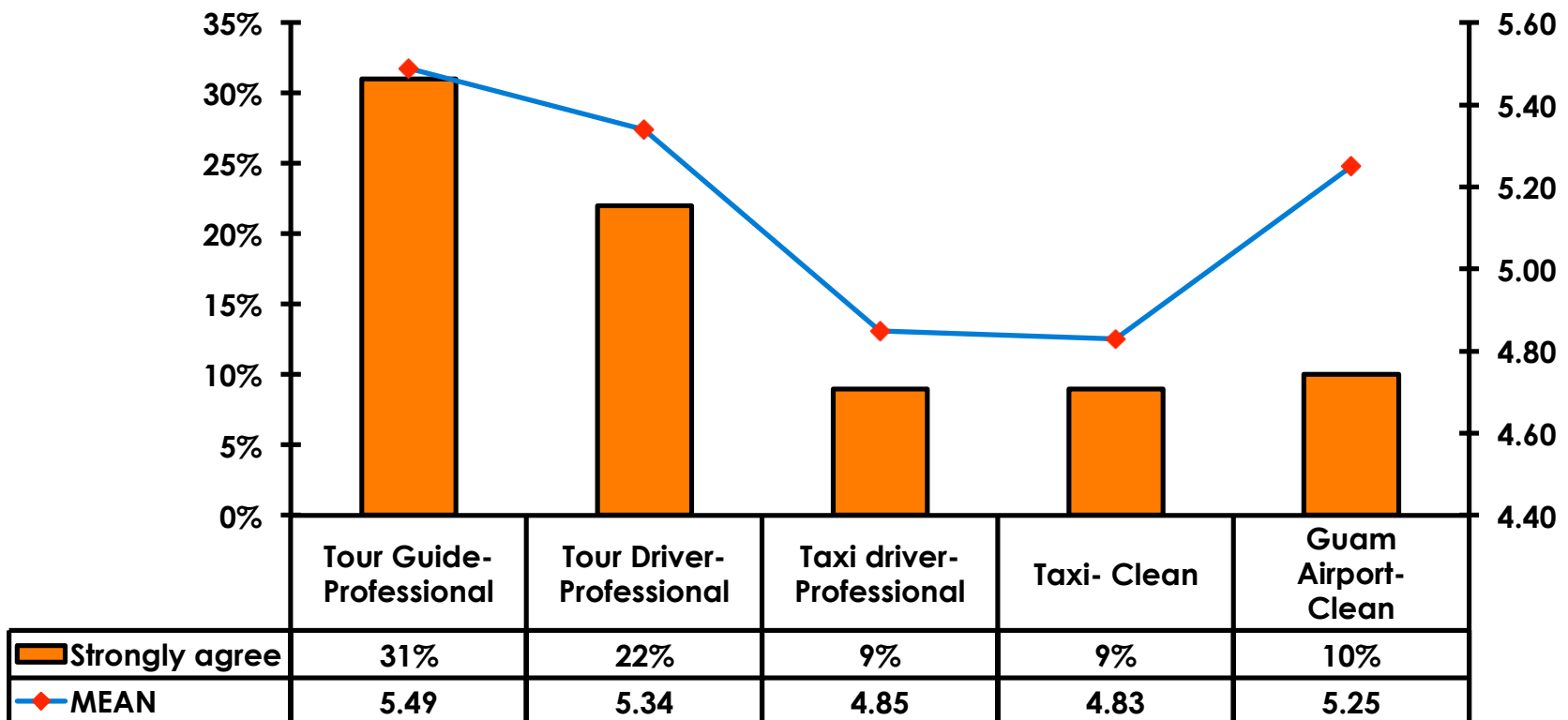
7=Very Satisfied/ 1=Very Dissatisfied



# Transportation

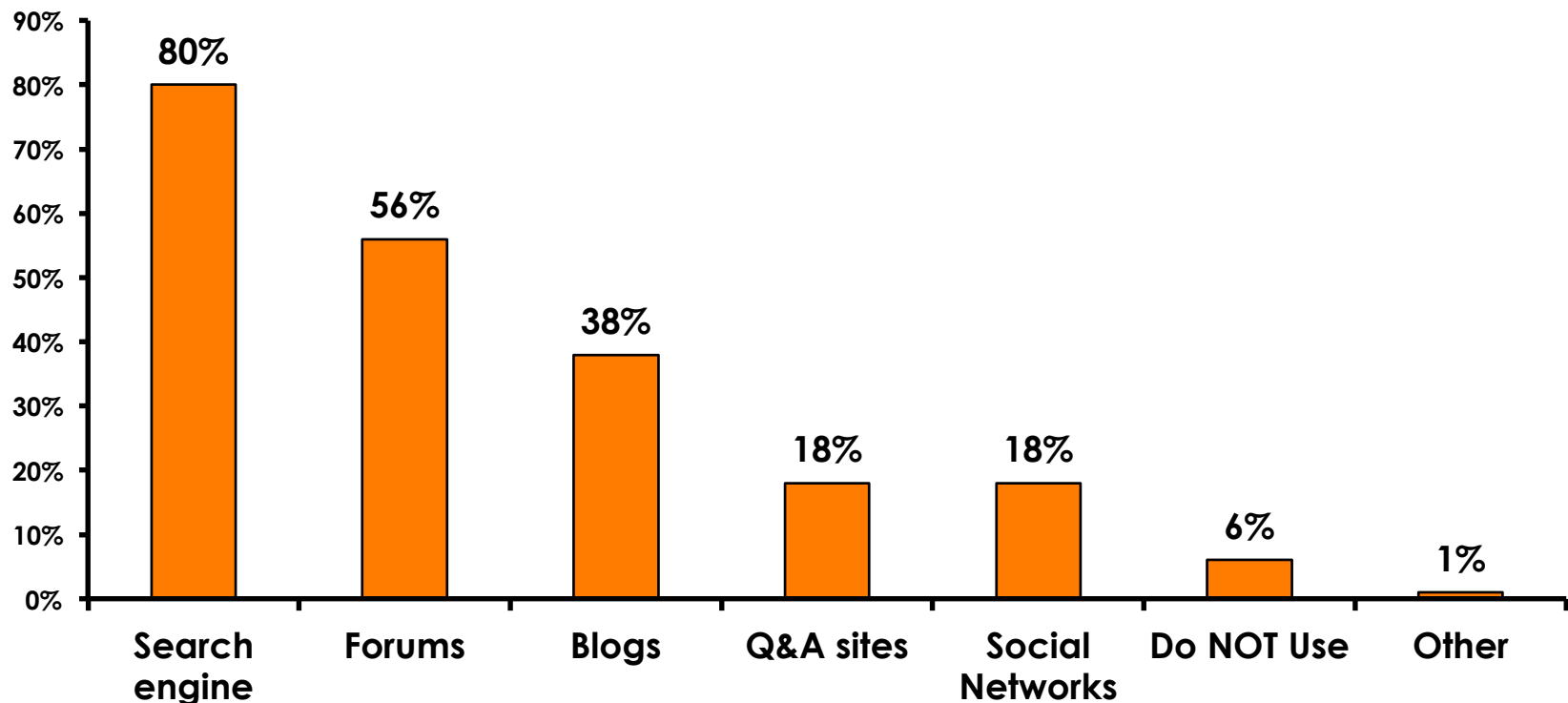
7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



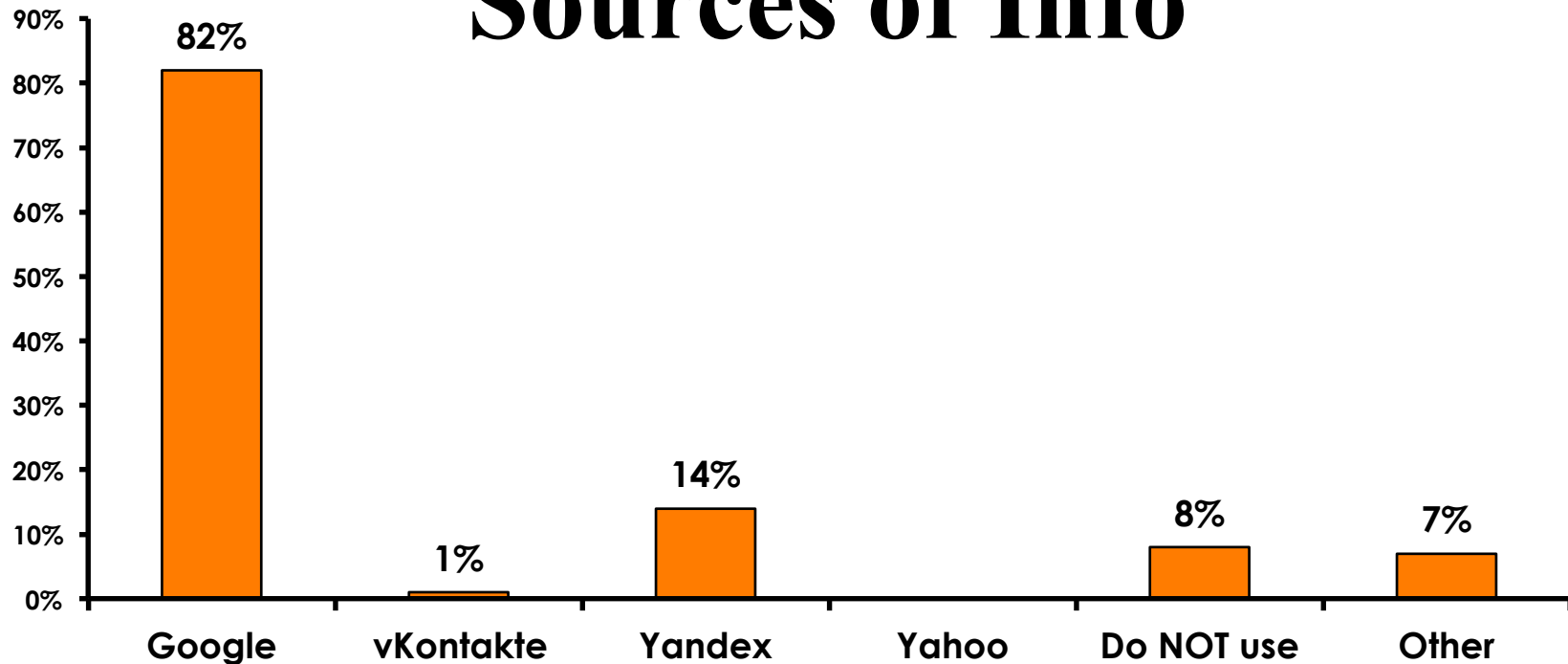
# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info

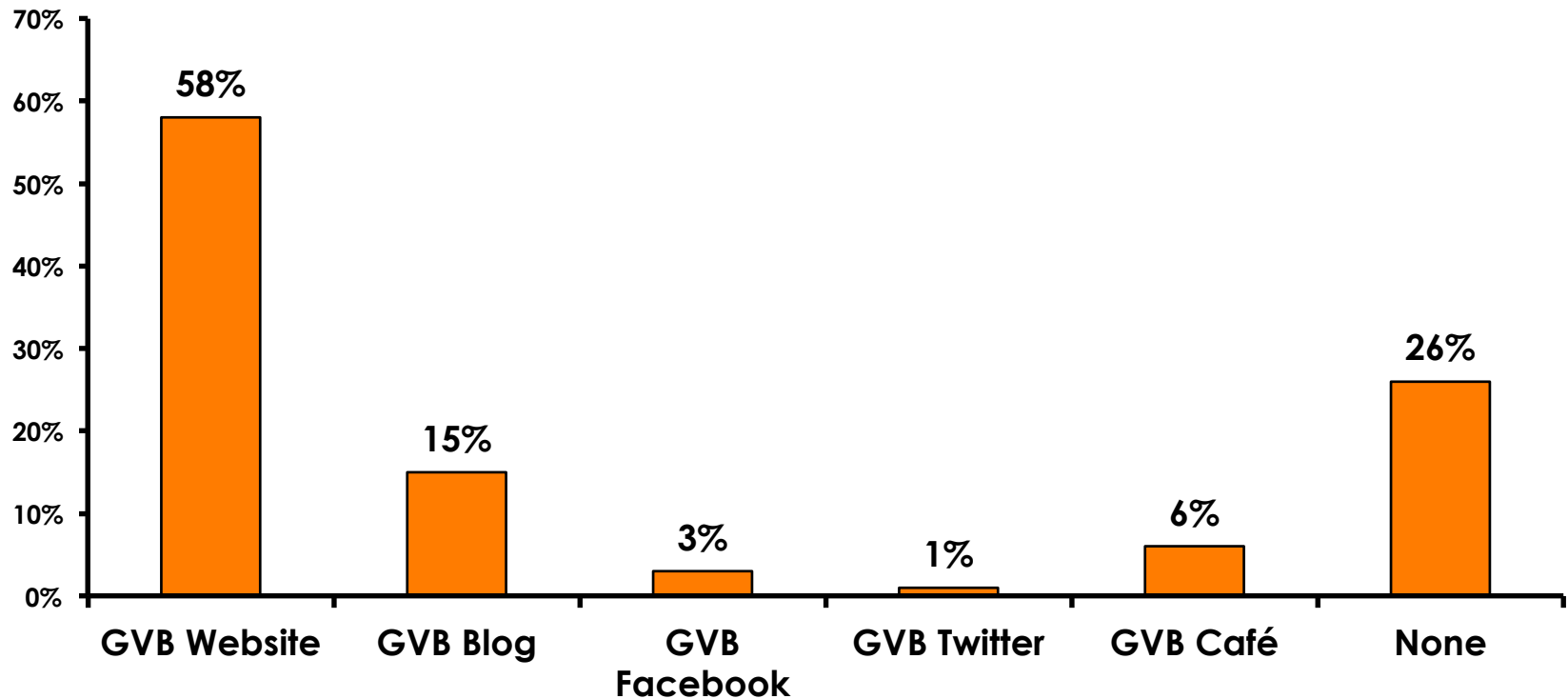


# Internet- Things To Do

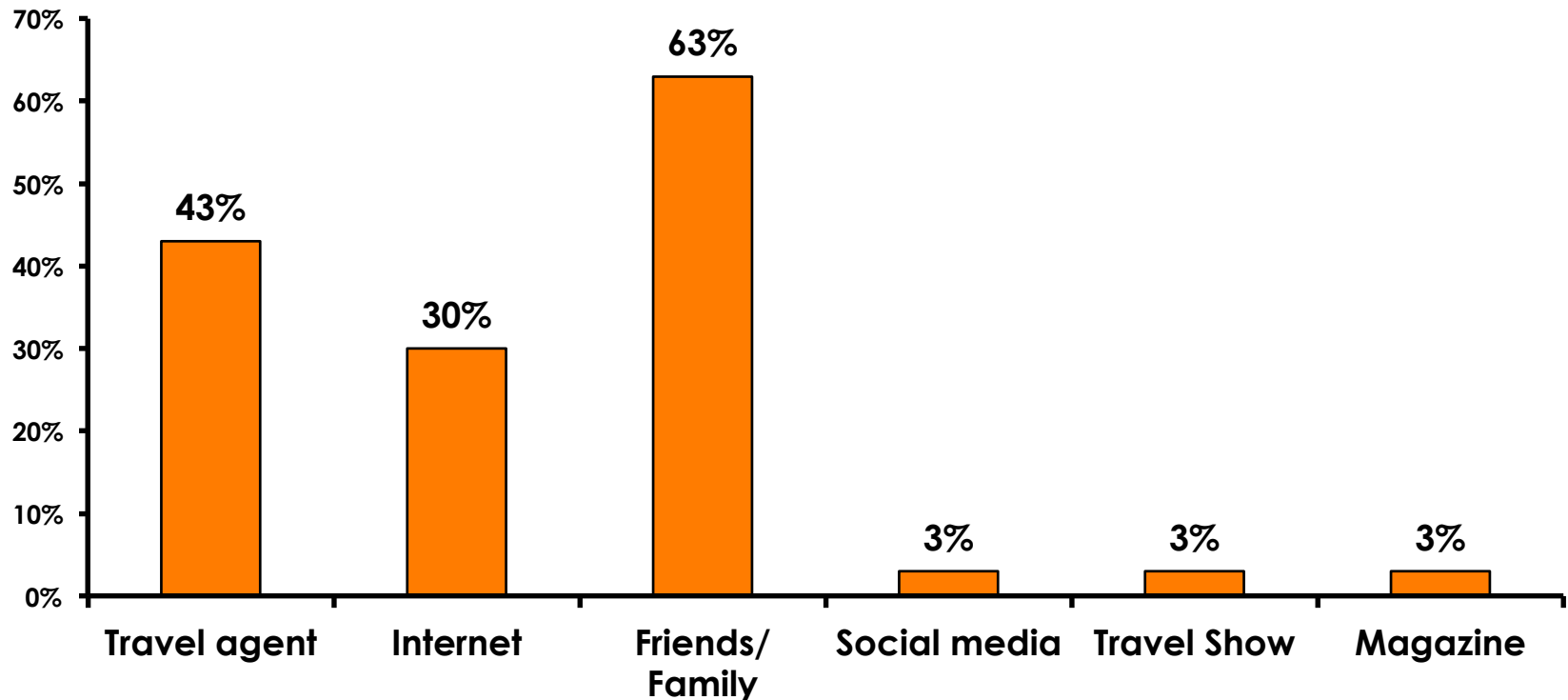
## Sources of Info



# Internet- GVB Sources

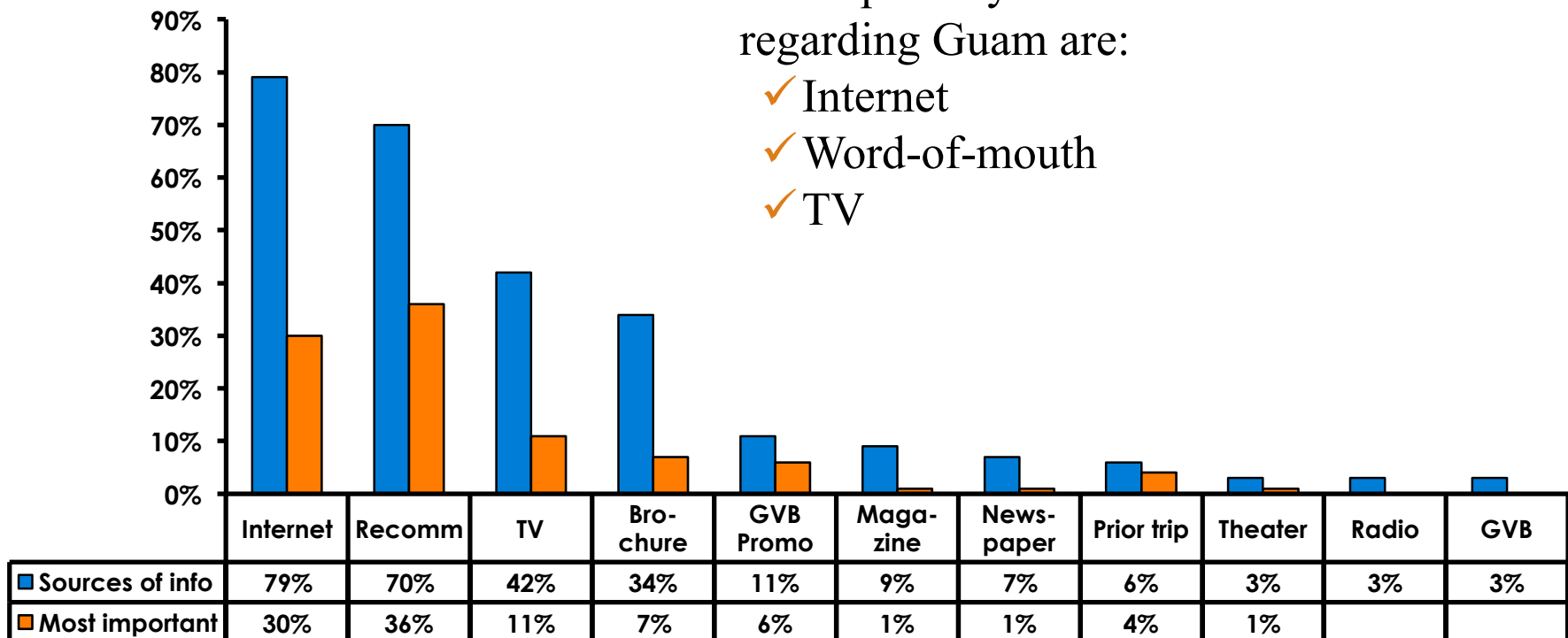


# Travel Motivation- Info Sources



# Sources of Information Pre-arrival

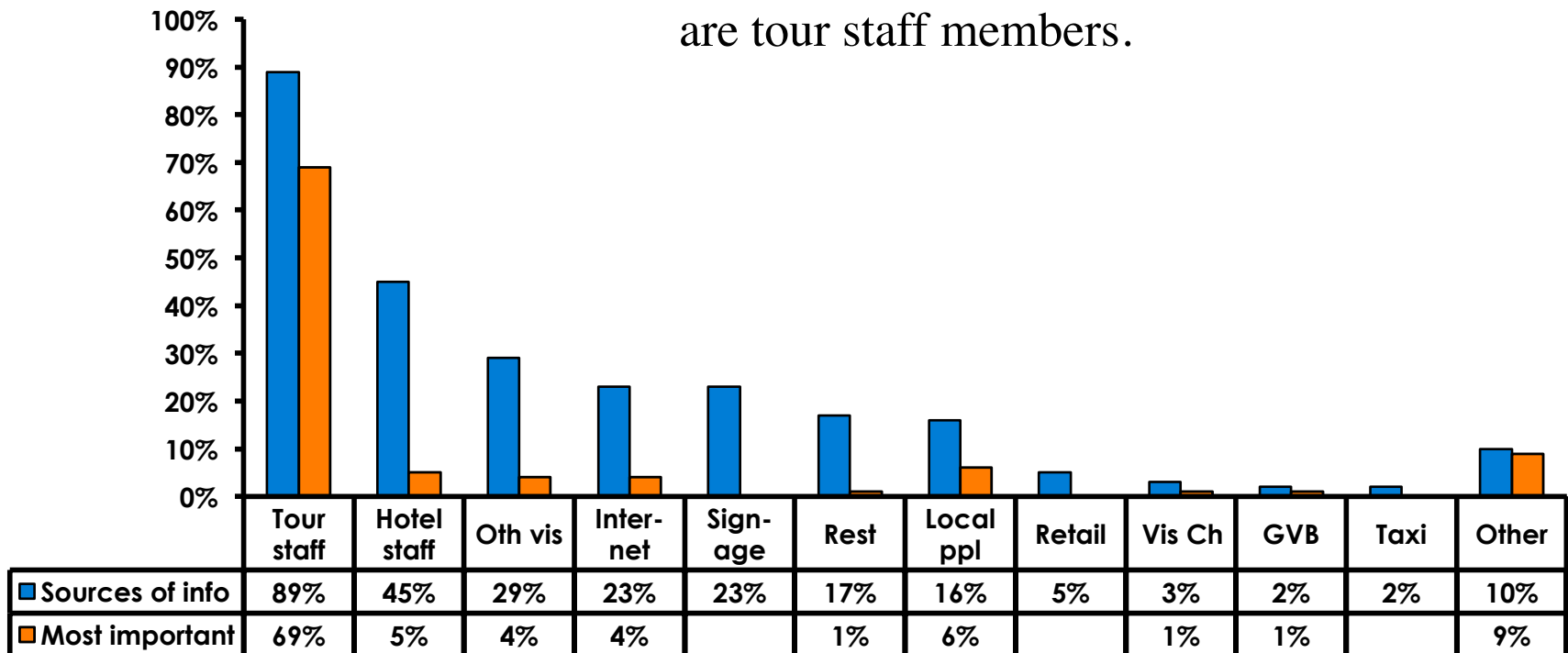
- The 3 primary sources of information regarding Guam are:
  - ✓ Internet
  - ✓ Word-of-mouth
  - ✓ TV





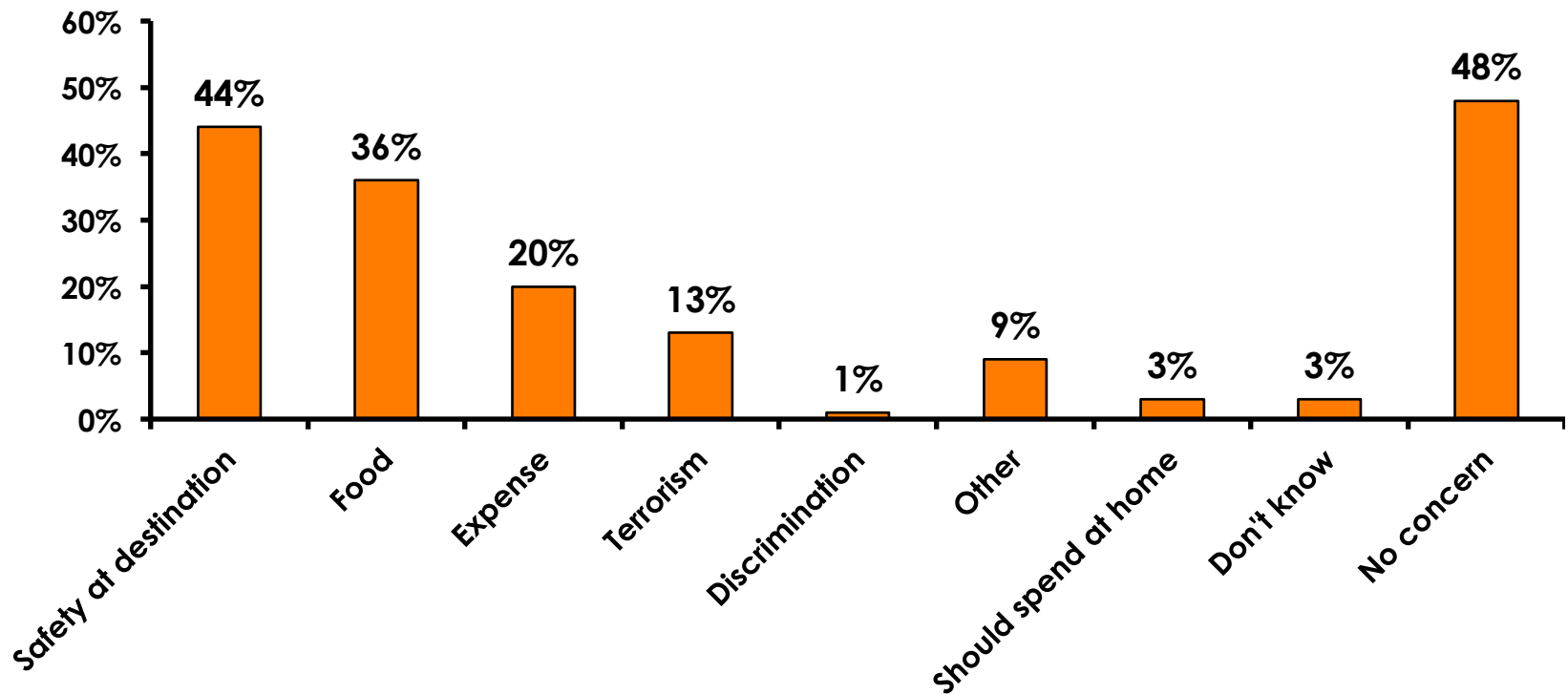
# Sources of Information Post-arrival

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



# SECTION 6 **OTHER ISSUES**

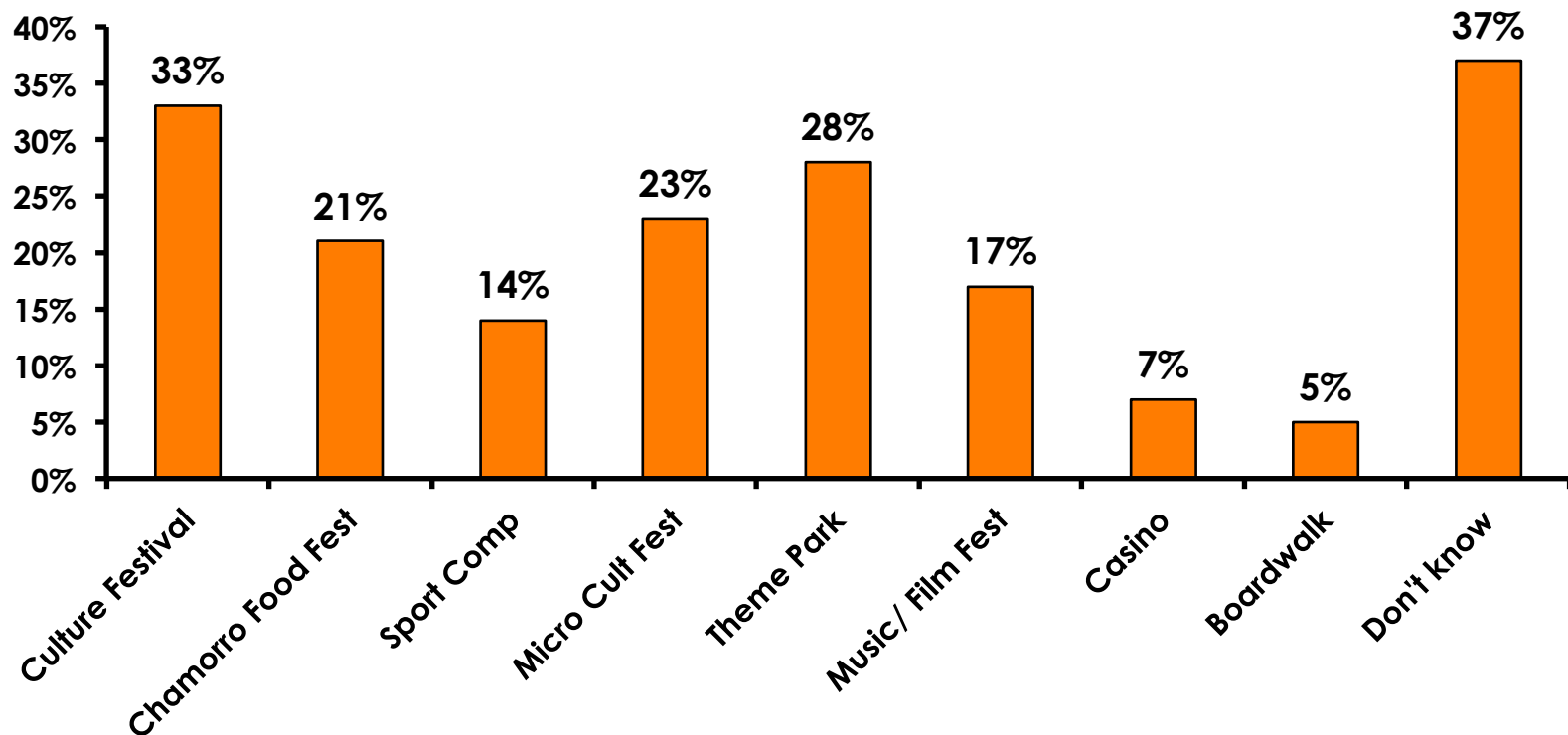
# Concerns about travel outside of Russia - Overall



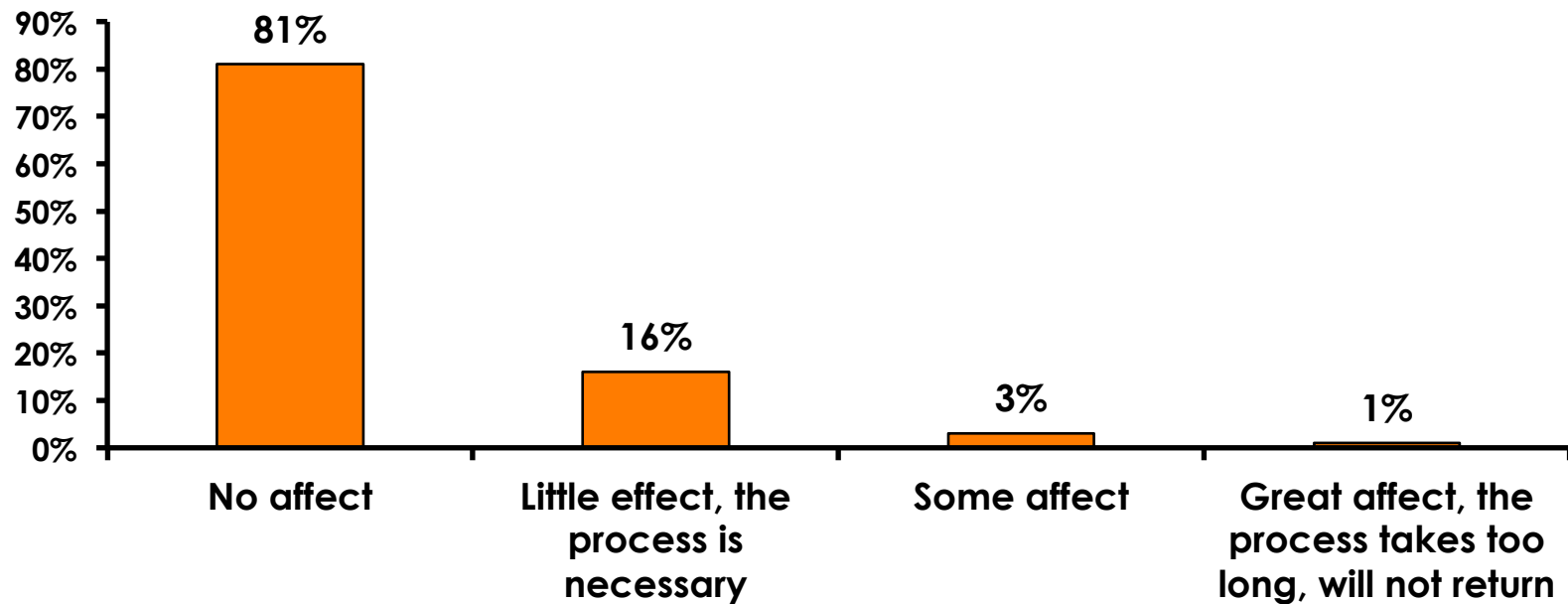
# Concerns about travel outside of Russia - By Age & Income

		TOTAL	AGE				Q27						
		-	18-24	25-34	35-49	50+	<732,321	732,321-1,098,481	1,098,482-1,464,642	1,464,643-1,830,803	1,830,803-2,263,124	2,263,125-3,661,606	3,661,607+ No Income
Q21	No concerns	48%	67%	52%	41%	55%	54%	33%	55%	67%	47%	57%	67%
	Safety	44%	17%	41%	49%	37%	34%	60%	40%	27%	35%	29%	33%
	Food	36%		41%	44%	24%	29%	50%	25%	27%	35%	14%	33%
	Expense	20%	33%	21%	22%	14%	20%	27%	20%	13%	12%		
	Terrorism	13%	17%	10%	16%	10%	11%	17%	10%	7%	12%		
	Other	9%	17%	3%	10%	12%	14%	8%			18%	14%	
	Don't know	3%			2%	6%		4%			6%	14%	
	Should spend at home	3%		3%	2%	4%	3%	4%					
	Discrimination against Russians	1%				2%			5%				
	Total Count	151	6	29	63	49	35	52	20	15	17	7	3

# Activities/ Attractions- Appeal



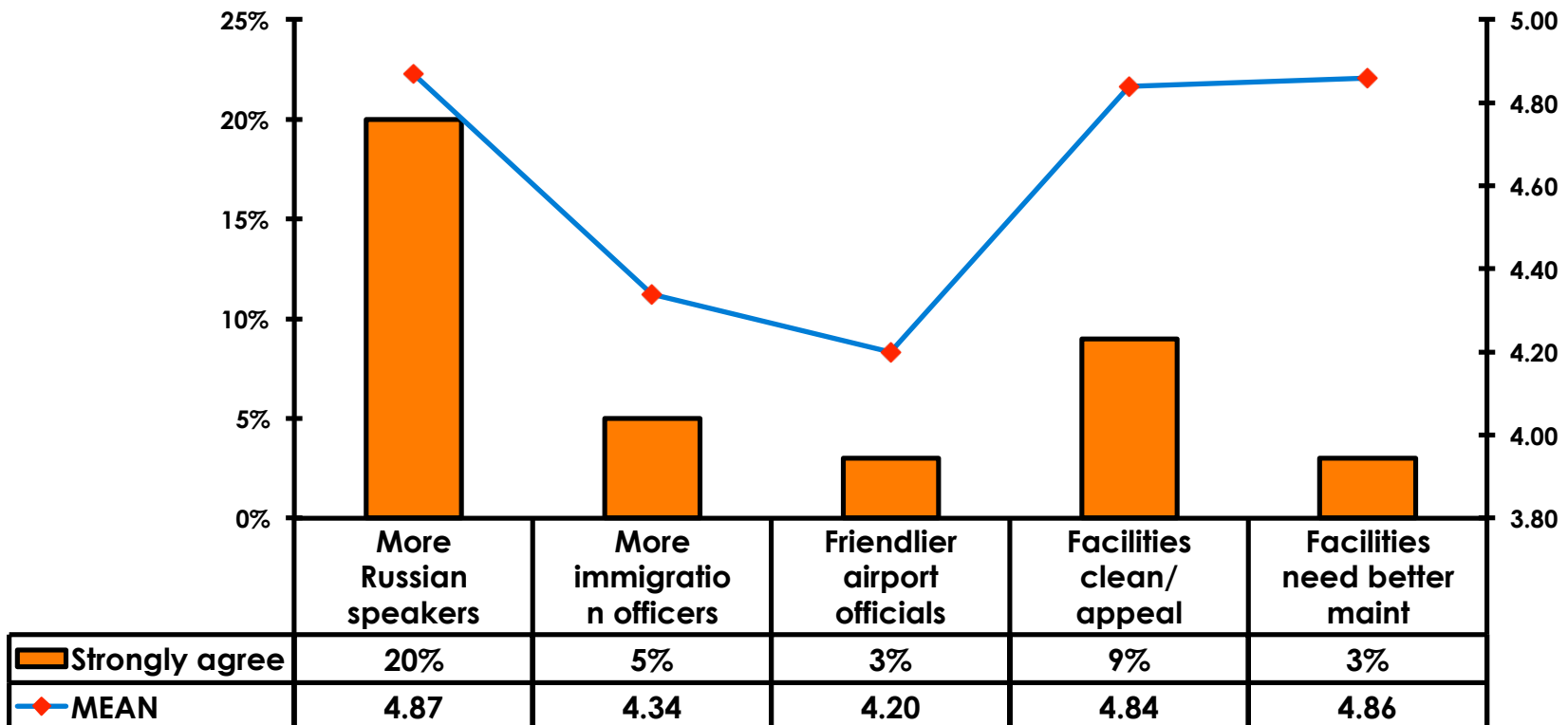
# Security Screening/ Immigration Process at Guam International Airport



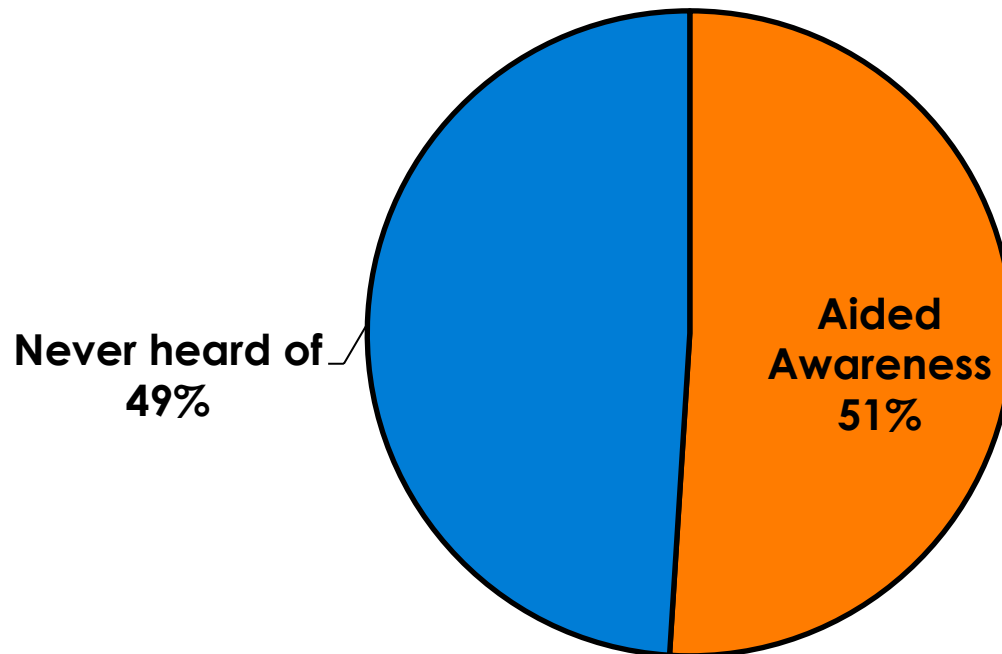
# Airport Arrival Experience

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



# Shop Guam Festival





# Shop Guam Festival - Impact

n=77

