



GUAM VISITORS BUREAU

Russia Visitor Tracker Exit Profile

FY2014

4TH Qtr. (JUL~SEPT 2014)



Prepared by: QMark Research

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Background & Methodology

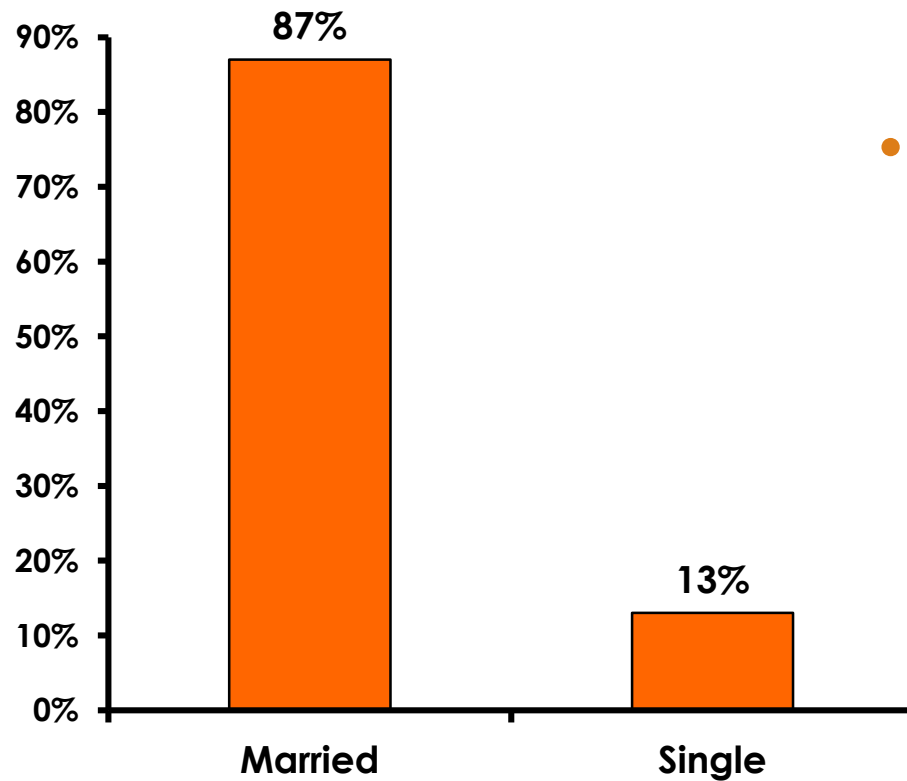
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **150** departing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

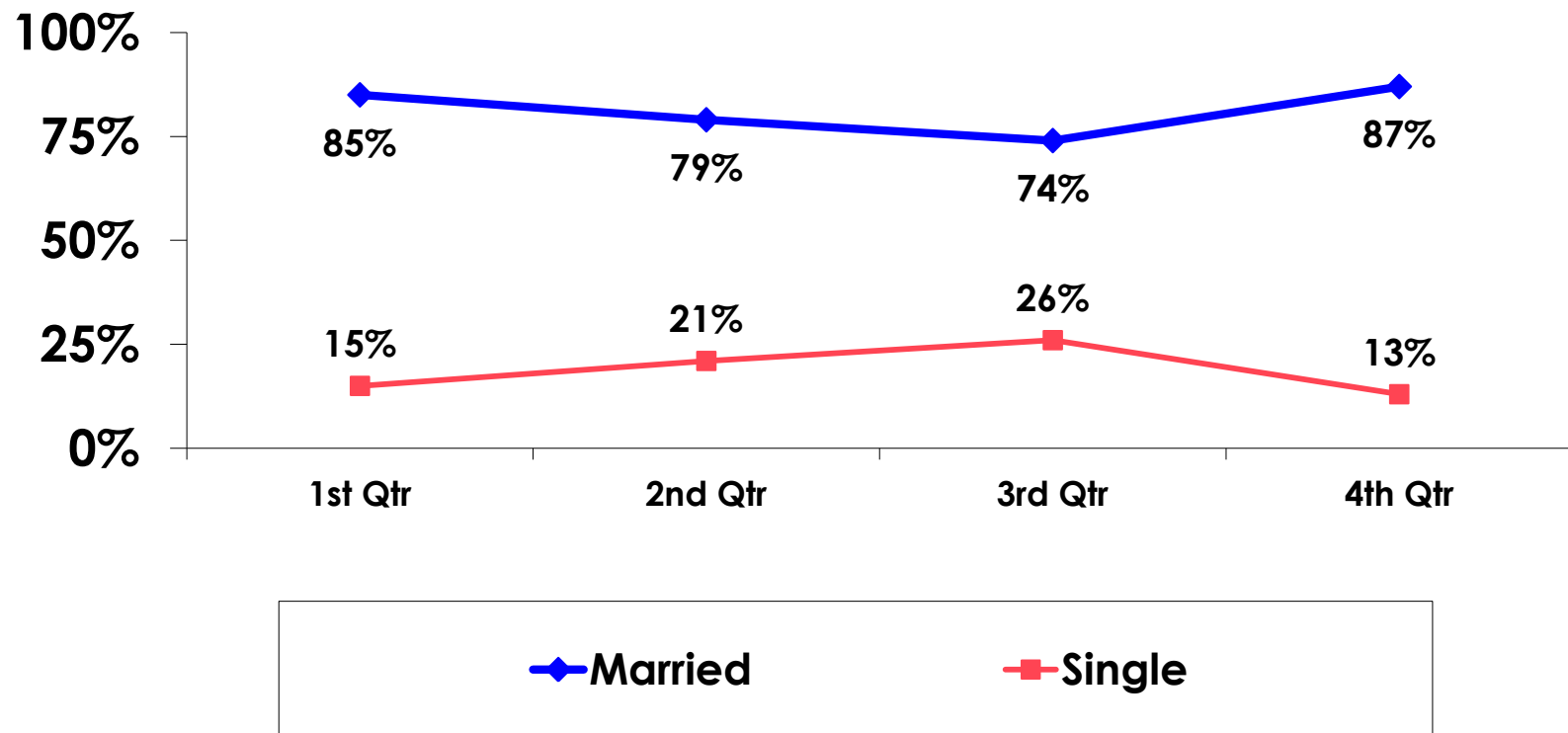
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

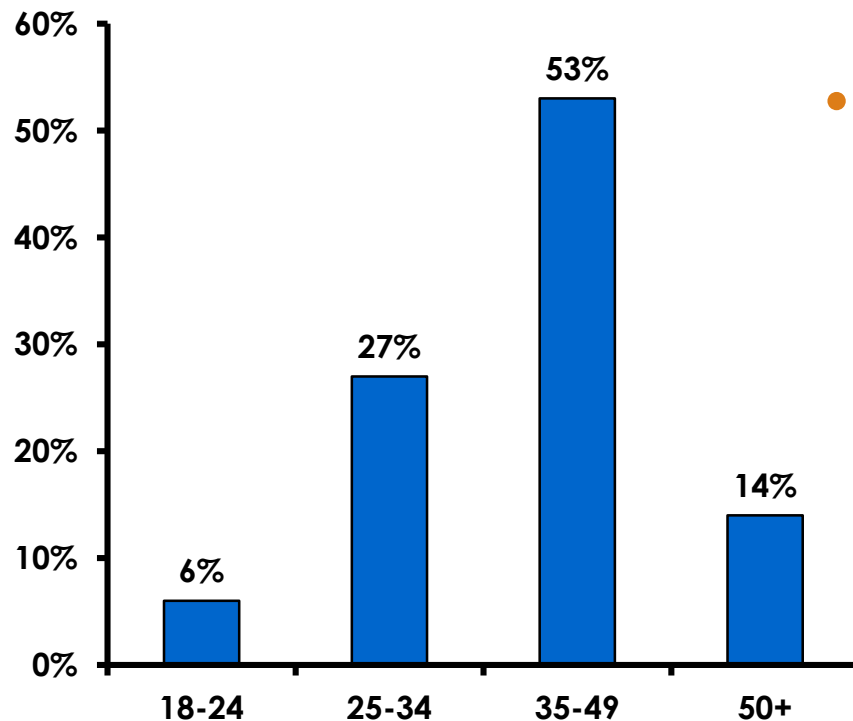


- Majority of Russian visitors are married.

MARITAL STATUS

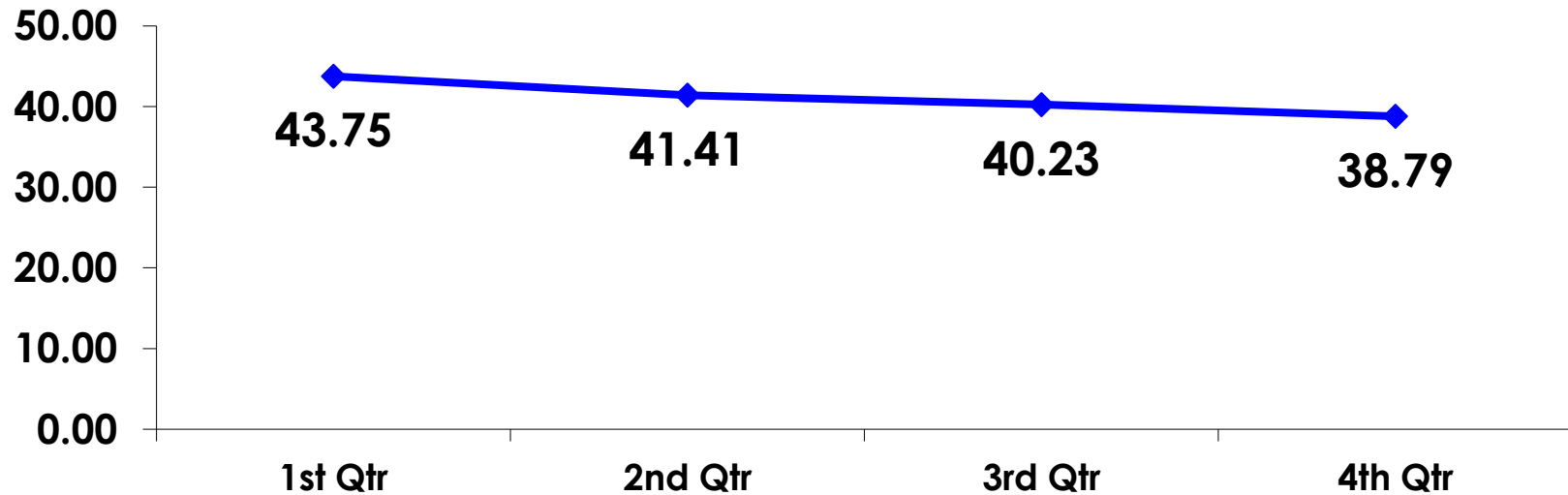


Age - Overall

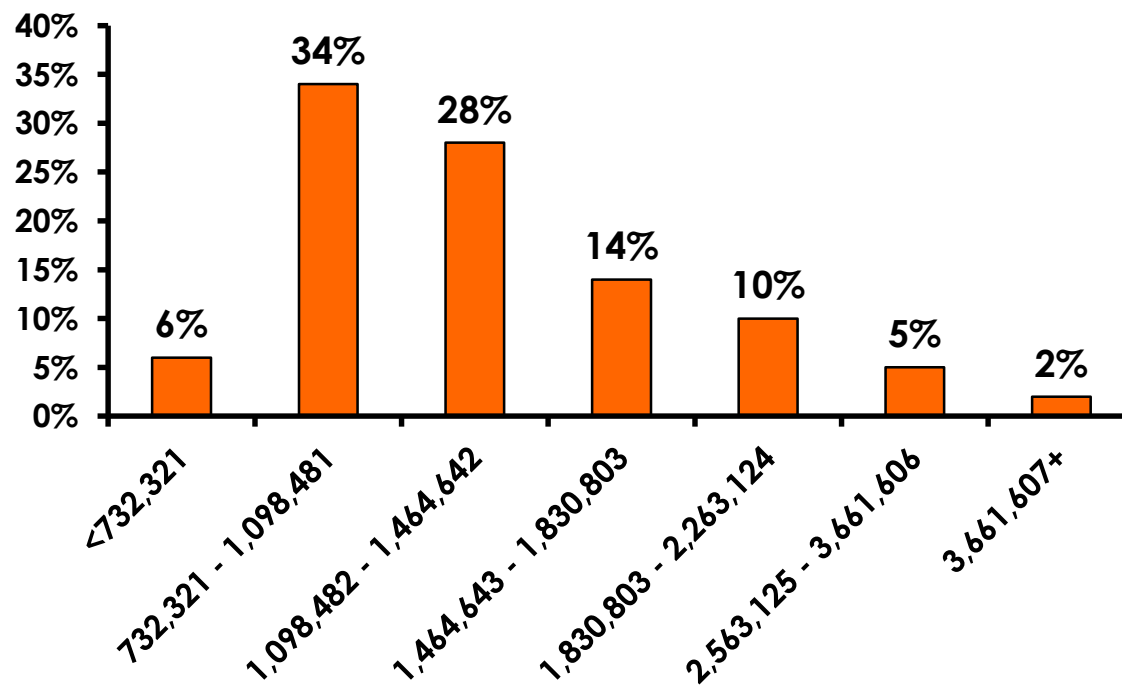


- The average age of the respondents is 38.79 years of age.

AVERAGE - AGE

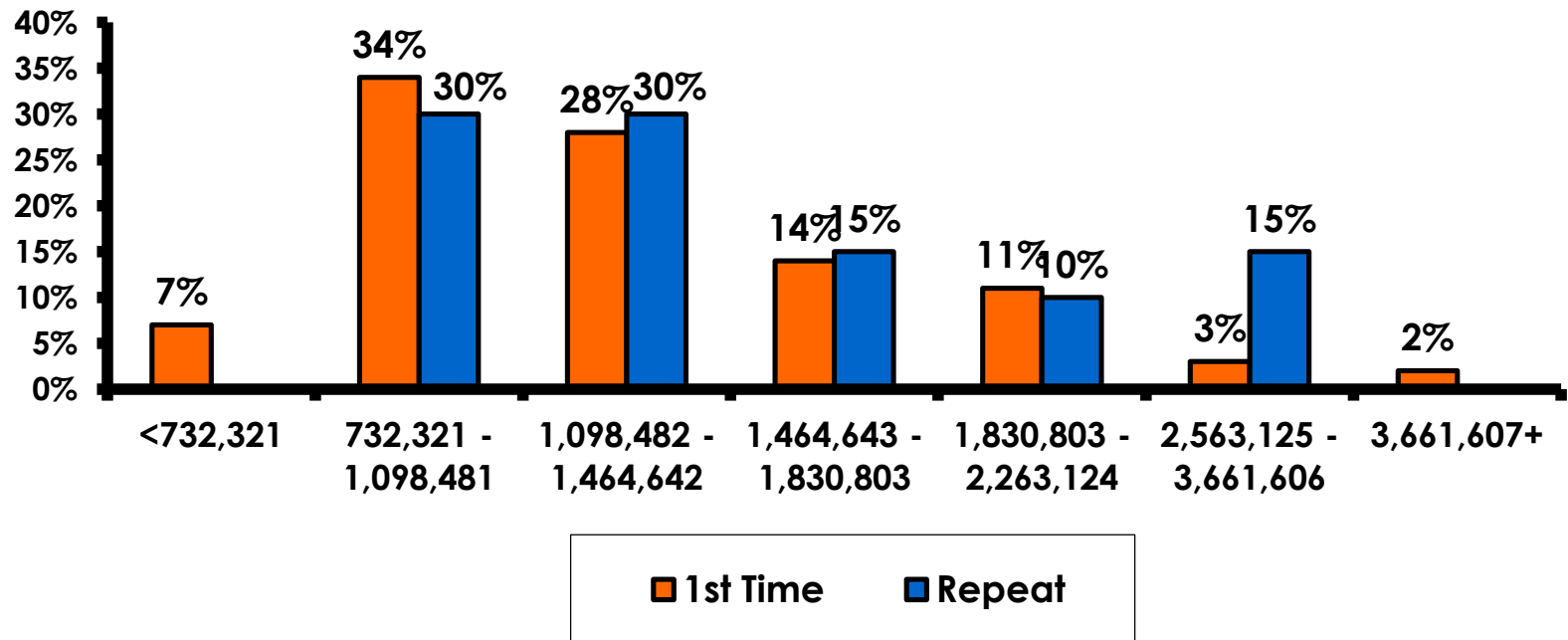


Personal Income



- Ruble
35.20=\$1

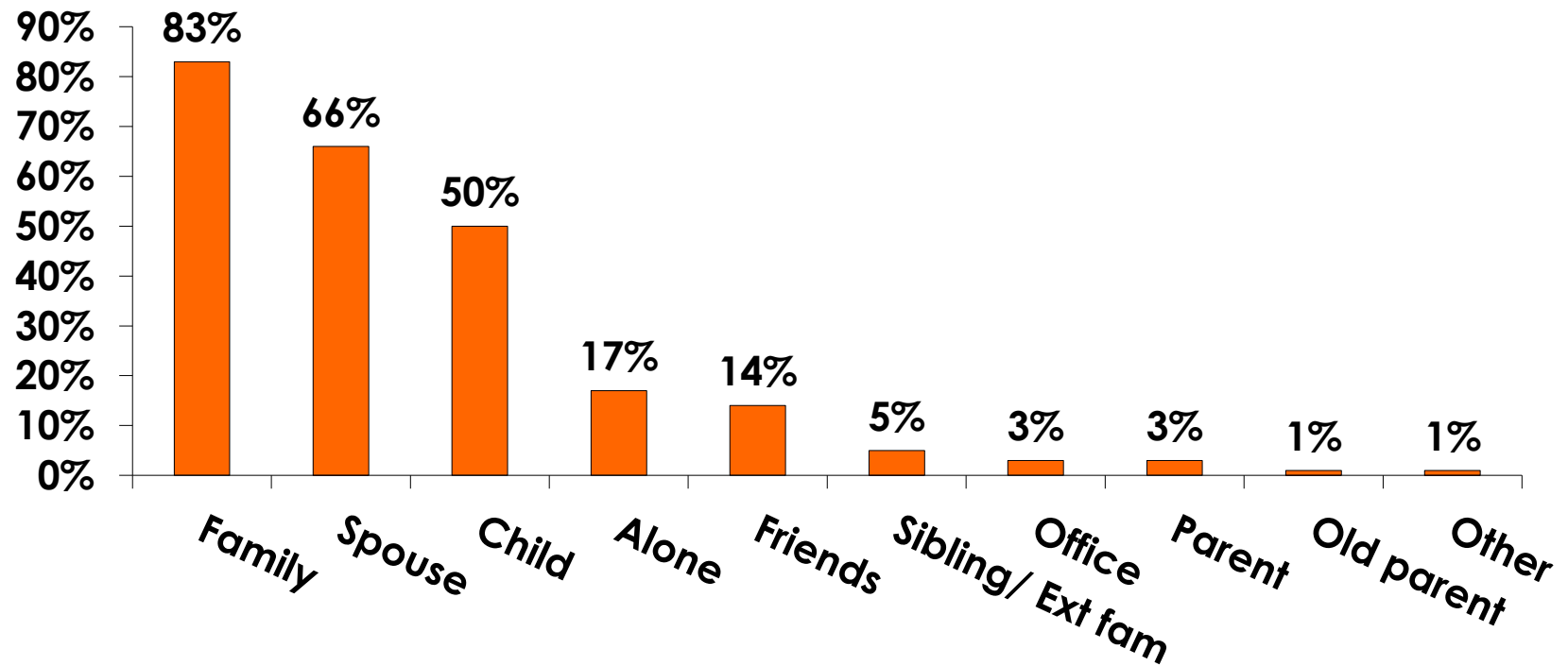
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q27	<732,321	Count	8	3	5	4			4
		Column N %	6%	4%	7%	44%			19%
	732,321-1,098,481	Count	48	22	26	2	11	27	8
		Column N %	34%	32%	35%	22%	29%	36%	38%
	1,098,482-1,464,642	Count	40	15	25		15	21	4
		Column N %	28%	22%	34%		39%	28%	19%
	1,464,643-1,830,803	Count	20	14	6	1	3	13	3
		Column N %	14%	20%	8%	11%	8%	17%	14%
	1,830,803-2,263,124	Count	15	8	7		6	9	
		Column N %	10%	12%	9%		16%	12%	
	2,563,125-3,661,606	Count	7	3	4		1	4	2
		Column N %	5%	4%	5%		3%	5%	10%
	3,661,607+	Count	3	3			2	1	
		Column N %	2%	4%			5%	1%	
	No Income	Count	2	1	1	2			
		Column N %	1%	1%	1%	22%			

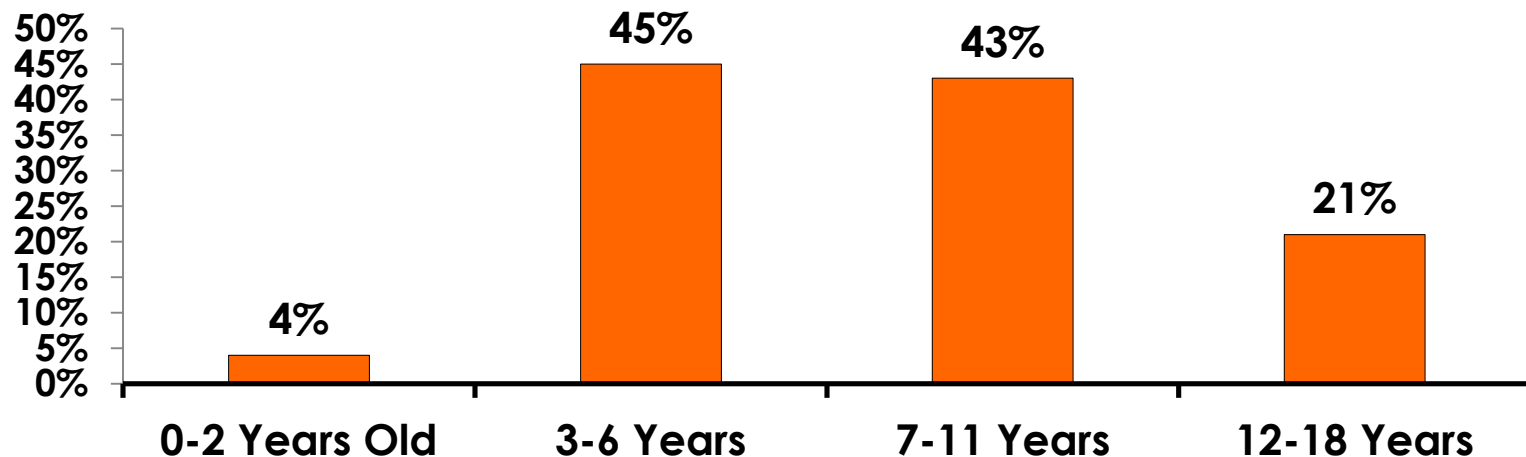
Travel Companions



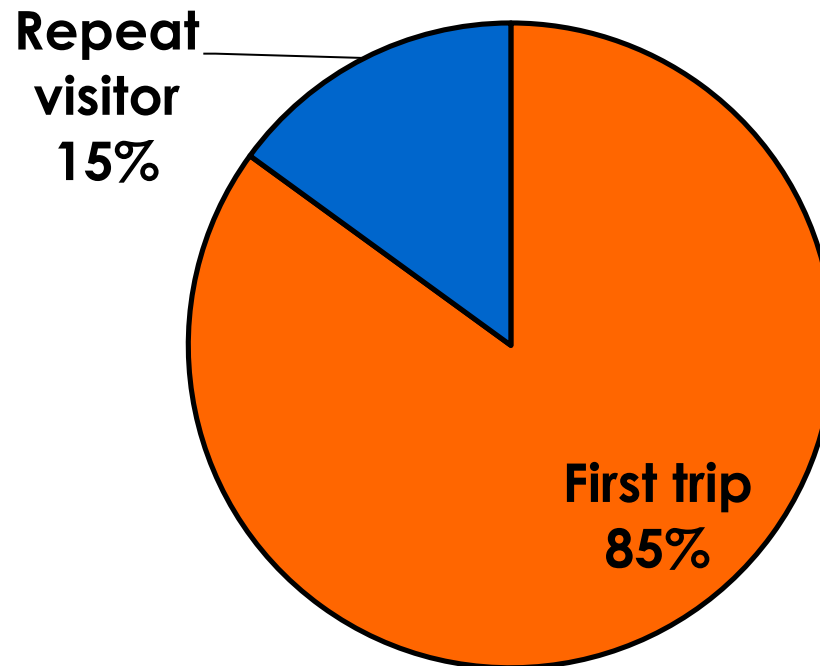
Number of Children Travel Party

N=75 total respondents traveling with children.

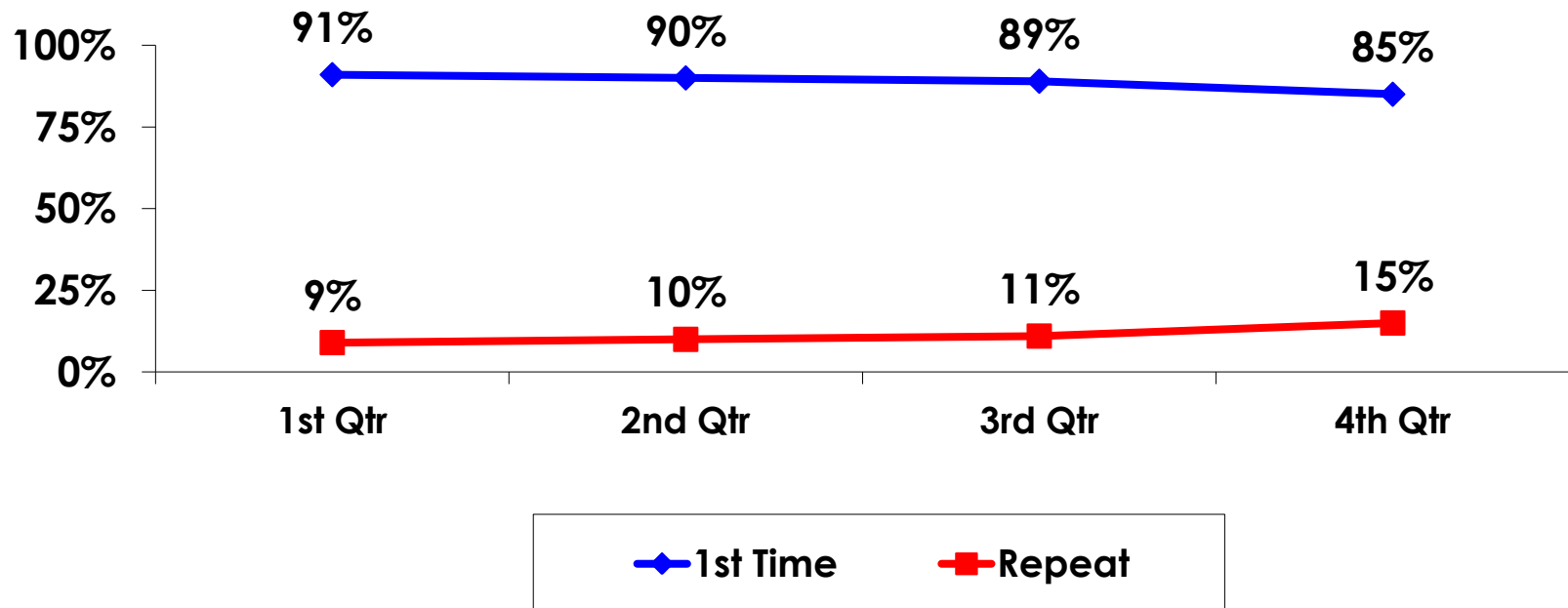
(Of those N=75 respondents, there is a total of 94 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM

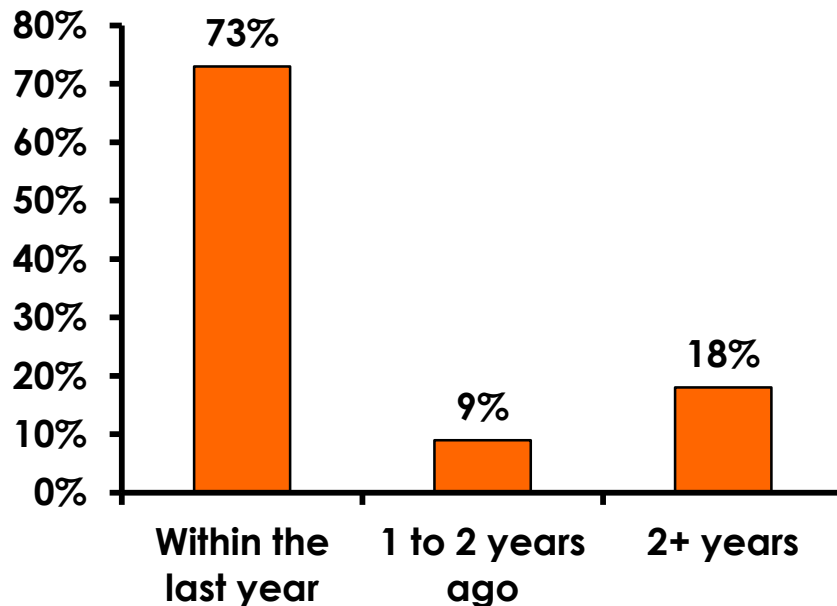


Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	73	62	11	
		Column N %	49%	49%	48%	
	Female	Count	77	65	12	
		Column N %	51%	51%	52%	
	Total	Count	150	127	23	
AGE	18-24	Count	9	9		
		Column N %	6%	7%		
	25-34	Count	41	35	6	
		Column N %	27%	28%	26%	
	35-49	Count	79	63	16	
		Column N %	53%	50%	70%	
	50+	Count	21	20	1	
		Column N %	14%	16%	4%	
		Total	Count	150	127	23

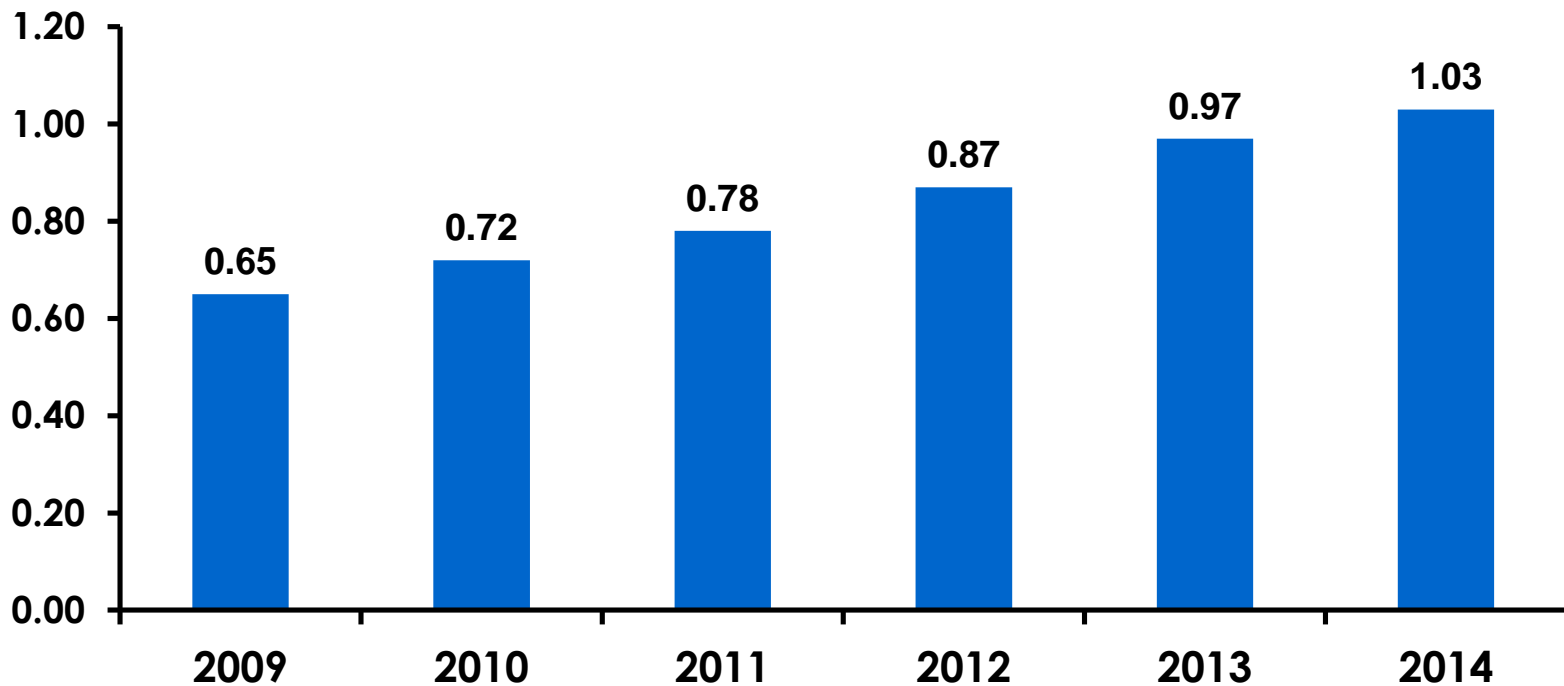
Repeat Visitors Last Trip

n = 22



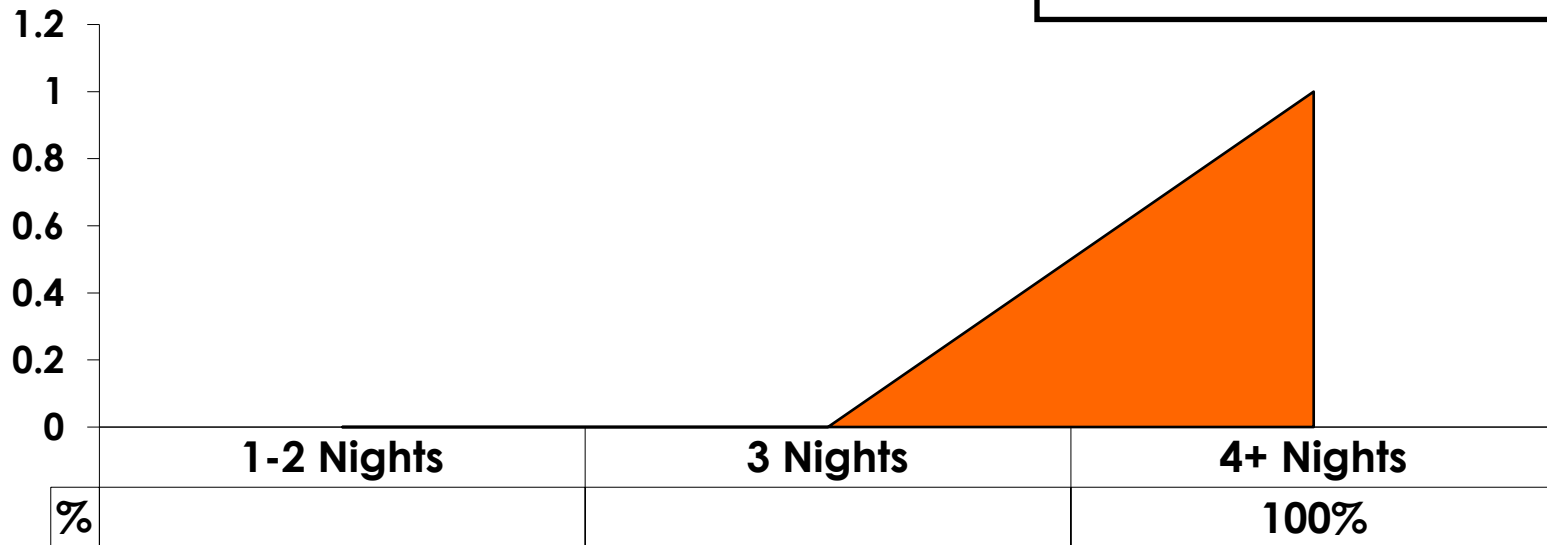
- The average repeat visitor has been to Guam 1.05 times.
- A majority of the repeat visitors have been to Guam within the last year.

Average Number Overnight Trips (2009-2014) (2 nights or more)

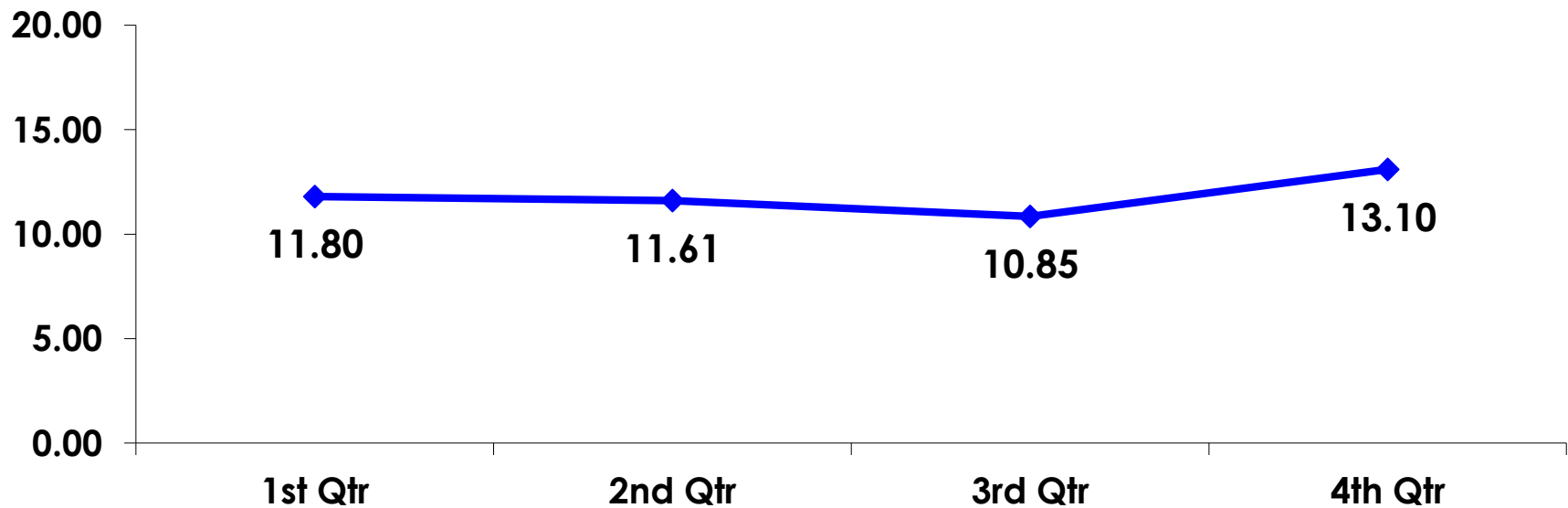


Length of Stay

Mean = 13.10 Days
Median = 13.0 Days



AVG LENGTH OF STAY

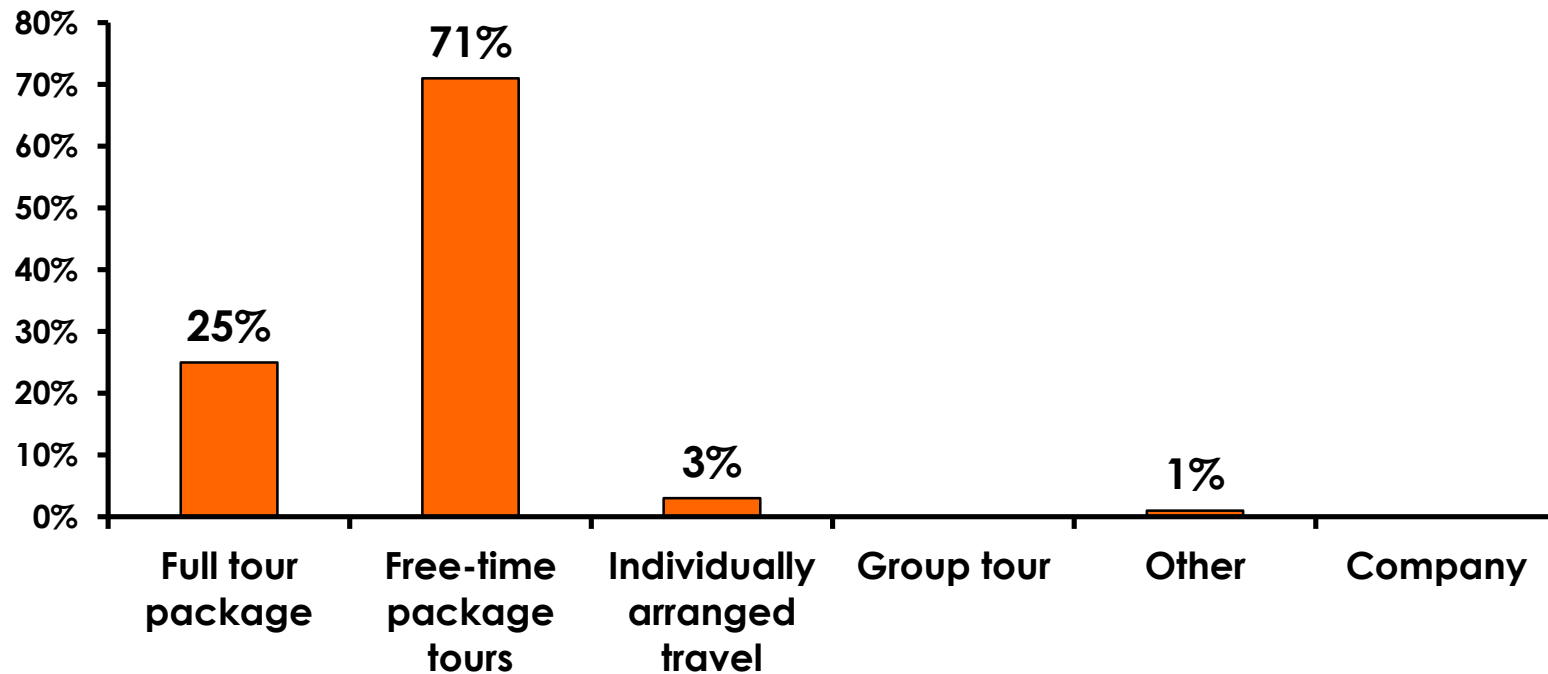


Occupation by Income

		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	Professional/ Specialist	19%		25%	30%	15%					
	Self-employed	15%				35%			71%		
	Company: Office/ Non-Mgr	12%	13%	25%	8%	5%					
	Homemaker	11%	13%	8%	20%	5%	13%				
	Other	8%		13%	10%		13%				
	Company: Engineer	7%		6%	13%	10%					
	Retired	5%	38%	6%		5%					
	Company: Exec	5%		2%		5%	7%	14%	100%		
	Teacher	5%		6%	10%						
	Company: Manager	5%		4%	3%	10%		14%			
	Student	4%	38%			5%				100%	
	Govt: Office/ Non-Mgr	3%		2%	5%		7%				
	Freelancer	1%		2%		5%					
	Govt: Executive	1%			3%						
	Total	Count	150	8	48	40	20	15	7	3	2

SECTION 2 **TRAVEL PLANNING**

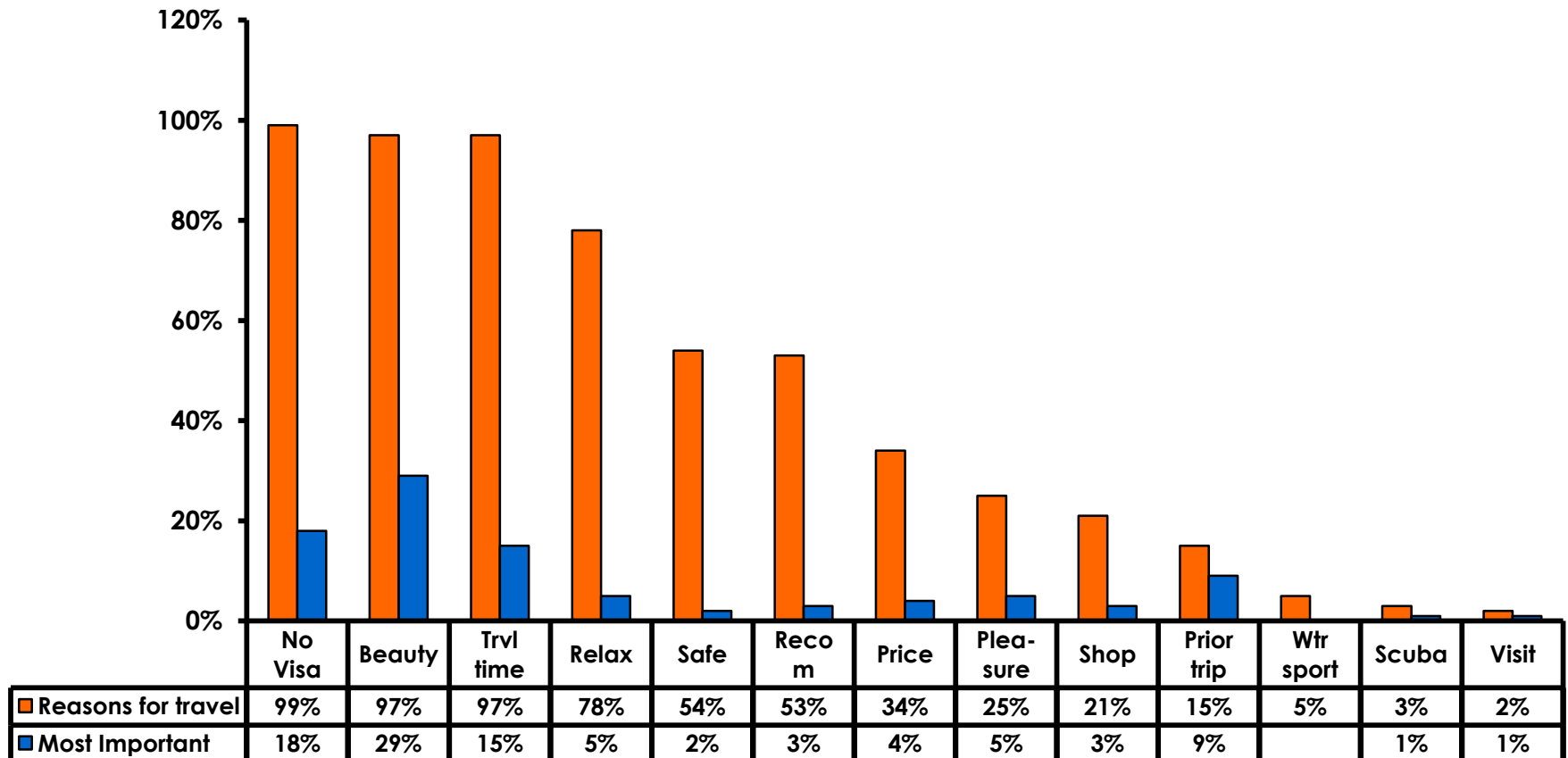
Travel Planning - Overall



Accommodation 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	
Q9	PIC Club	17%		13%	28%	20%	13%				
	Bayview Hotel	10%	25%	10%	13%	5%	7%				
	Tumon Bay Capital Hotel	8%	25%	10%	5%	10%				50%	
	Onward Beach Resort	7%		4%	18%	10%					
	Westin Resort Guam	7%		2%	3%	20%	20%	14%			
	Royal Orchid Guam	5%		13%	3%	5%					
	Outrigger Guam Resort	5%		2%	5%	5%	7%	29%	33%		
	Hyatt Regency Guam	5%				5%	20%	29%	33%		
	Verona Resort & Spa	5%	13%	6%	8%						
	Guam Reef & Olive Spa	5%		4%	8%		13%				
	Guam Marriott Resort	4%	13%	6%	3%					50%	
	Fiesta Resort Guam	3%		2%	5%	5%					
	Oceanview Hotel	3%		8%	3%						
	Holiday Resort Guam	3%		4%	3%	5%					
	Pacific Bay Hotel	3%	13%	6%							
	Home stay/ friend/ relative	2%		4%		5%					
	Hilton Guam Resort	2%				5%	7%	14%			
	Hotel Santa Fe	1%		2%			7%				
	Apartment	1%	13%						33%		
	Hotel Nikko Guam	1%					7%	14%			
	Grand Plaza Hotel	1%		2%							
	Total	Count	150	8	48	40	20	15	7	3	2

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches
- No visa requirement
- Short travel time

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	99%	100%	100%	100%	95%	100%	99%	
	Natural beauty	97%	100%	100%	97%	90%	99%	96%	
	Short travel time	97%	78%	100%	100%	90%	99%	96%	
	Relax	78%	89%	66%	82%	81%	81%	75%	
	Safe	54%	33%	66%	53%	43%	56%	52%	
	Recomm- friend/family/trv agnt	53%	67%	61%	52%	33%	52%	53%	
	Price	34%	56%	32%	34%	29%	30%	38%	
	Pleasure	25%		29%	25%	29%	33%	18%	
	Shopping	21%	33%	22%	23%	5%	12%	29%	
	Previous trip	15%		15%	20%	5%	15%	16%	
	Other	9%		12%	10%		8%	9%	
	Water sports	5%		7%	5%		8%	1%	
	Scuba	3%		5%	3%		3%	3%	
	Visit friends/ Relatives	2%			3%	5%	1%	3%	
	Organized sports	1%		2%				1%	
	Company Sponsored	1%		2%				1%	
	Total	Count	150	9	41	79	21	73	77

Motivation by Income

		TOTAL	Q27								
		-	<732,321	732,321-1,098,481	1,098,482-1,464,642	1,464,643-1,830,803	1,830,803-2,263,124	2,263,125-3,661,606	3,661,607+	No Income	
Q5A	No Visa required	99%	100%	100%	98%	100%	100%	100%	100%	100%	
	Natural beauty	97%	88%	96%	98%	100%	100%	100%	100%	100%	
	Short travel time	97%	75%	100%	100%	95%	100%	86%	100%	100%	
	Relax	78%	88%	77%	78%	85%	60%	71%	100%	100%	
	Safe	54%	13%	52%	50%	75%	33%	86%	100%	50%	
	Recomm- friend/family/trvl agnt	53%	25%	58%	50%	35%	53%	57%	100%	100%	
	Price	34%	25%	46%	33%	25%	33%	14%		100%	
	Pleasure	25%		13%	33%	40%	47%	29%			
	Shopping	21%	25%	15%	30%	10%	27%	29%		50%	
	Previous trip	15%		13%	15%	15%	13%	43%			
	Other	9%		17%	10%	5%					
	Water sports	5%		4%	5%	5%	13%				
	Scuba	3%		2%	3%		7%				
	Visit friends/ Relatives	2%		4%	3%						
	Organized sports	1%		2%							
	Company Sponsored	1%		2%							
	Total	Count	150	8	48	40	20	15	7	3	2

SECTION 3 **EXPENDITURES**

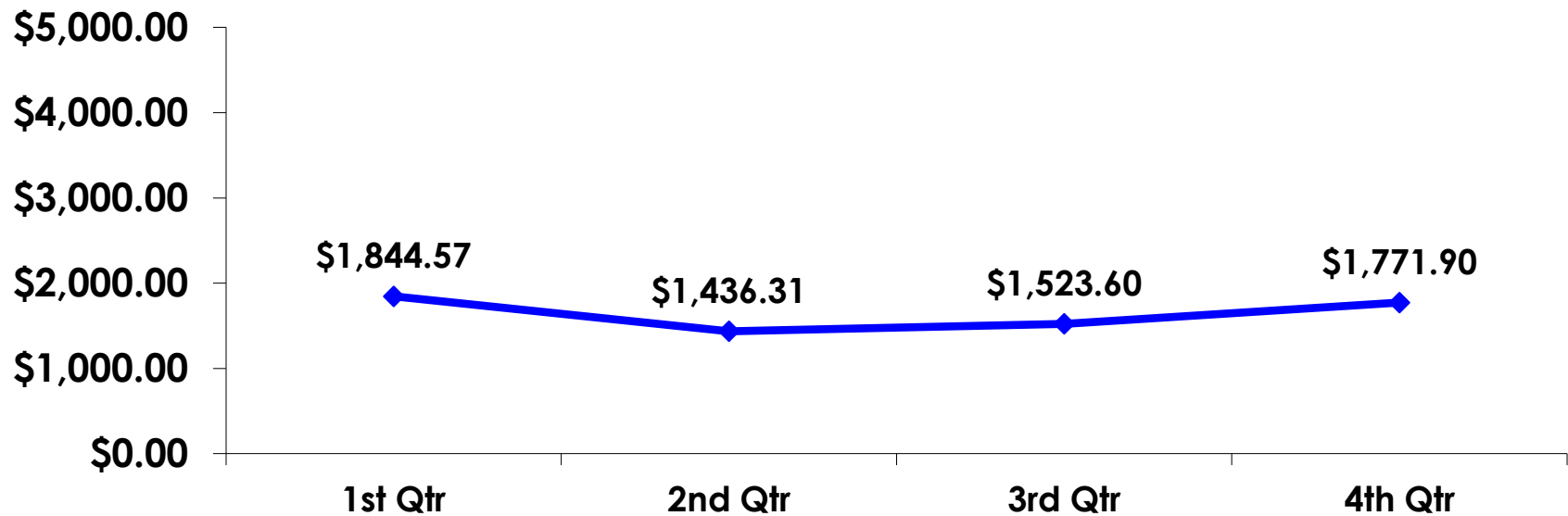
Prepaid Expenditures

Ruble 35.20 /US\$1

- \$4,060.85 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$14,205 = maximum (highest amount recorded for the entire sample)
- \$1,771.90 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$1,644.43

Breakdown of Prepaid Expenditures

Rub 35.20=\$1

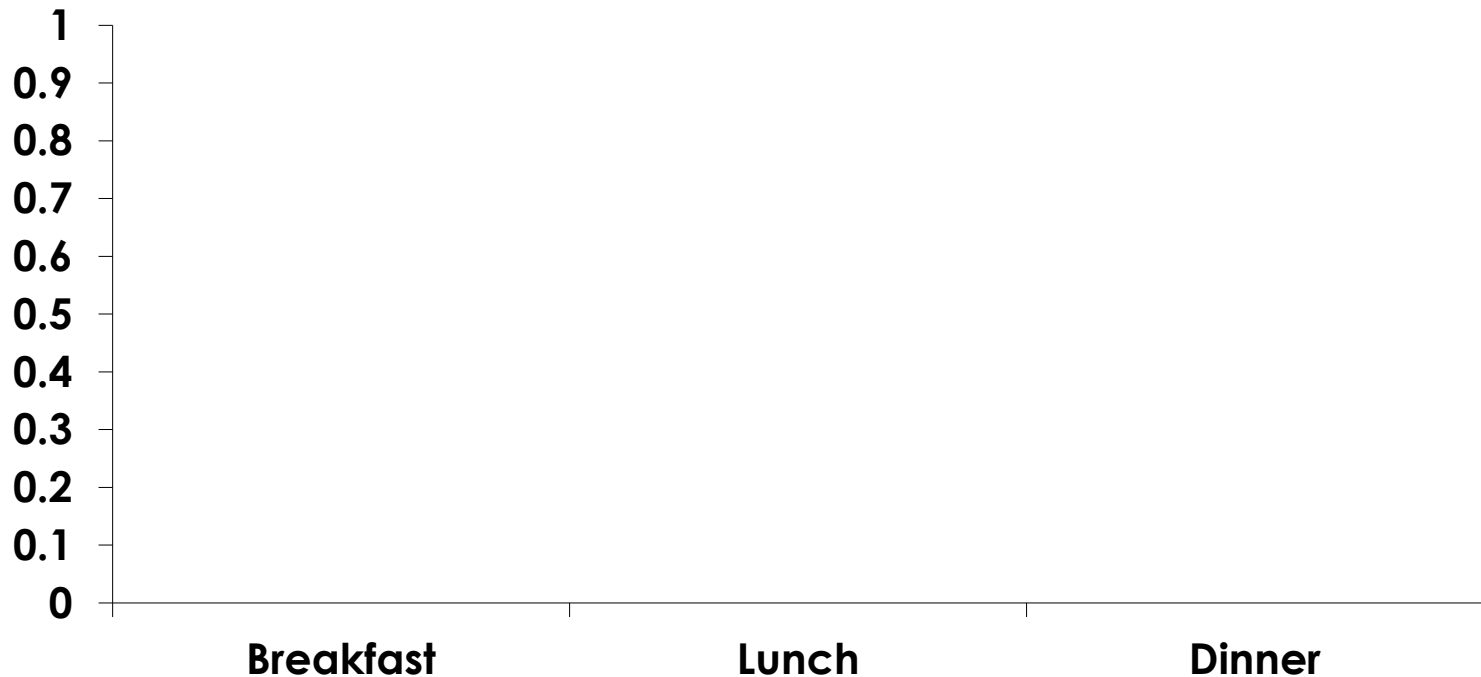
**(Filter: Only those who responded/
Per Travel Party)**

	MEAN \$
Air & Accommodation package only	\$3,312.24
Air & Accommodation w/ daily meal package	\$5,751.68
Air only	\$4,545.45
Accommodation only	\$-
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation – Russia	\$-
Ground transportation – Guam	\$-
Optional tours/ activities	\$-
Other expenses	\$-
Total Prepaid	\$4,060.85

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n= x

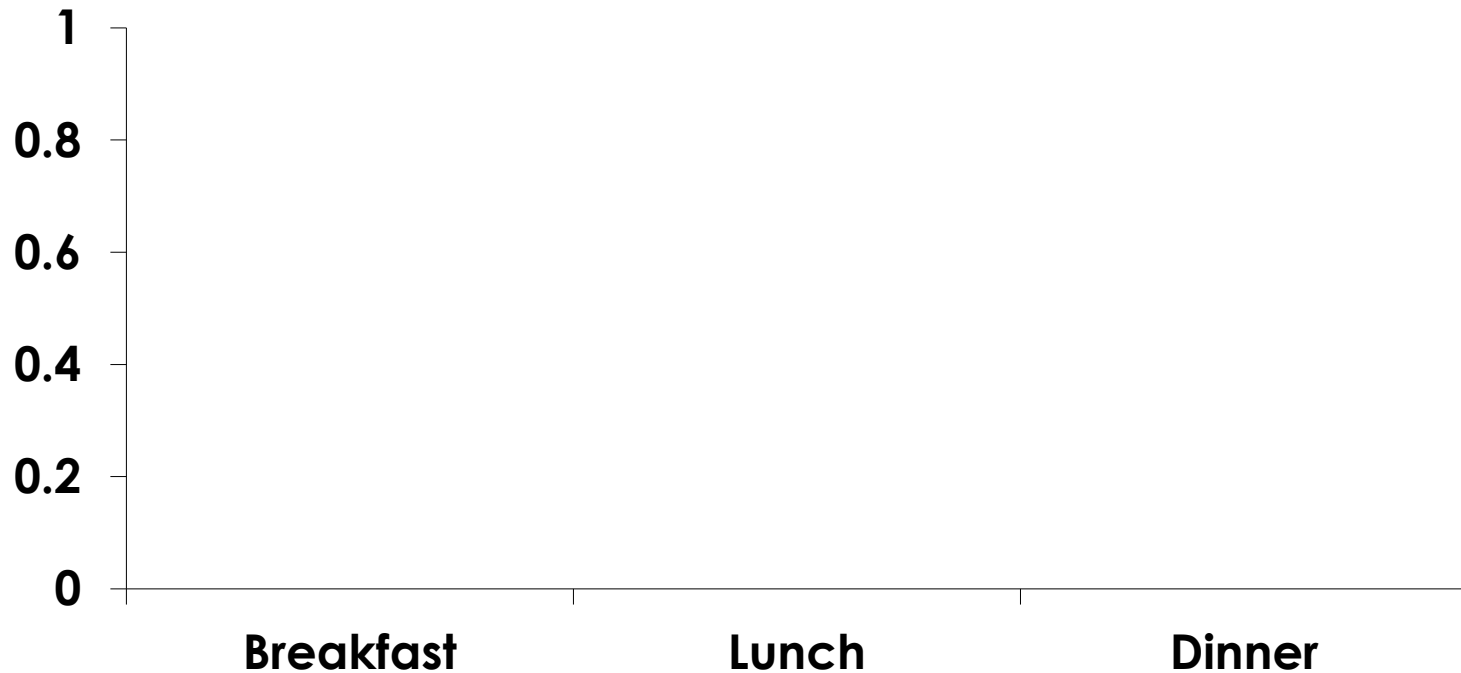


Mean=\$5,751.68 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

n=x



Mean=\$xxx.xx per travel party

PREPAID GROUND TRANSPORTATION

n=x



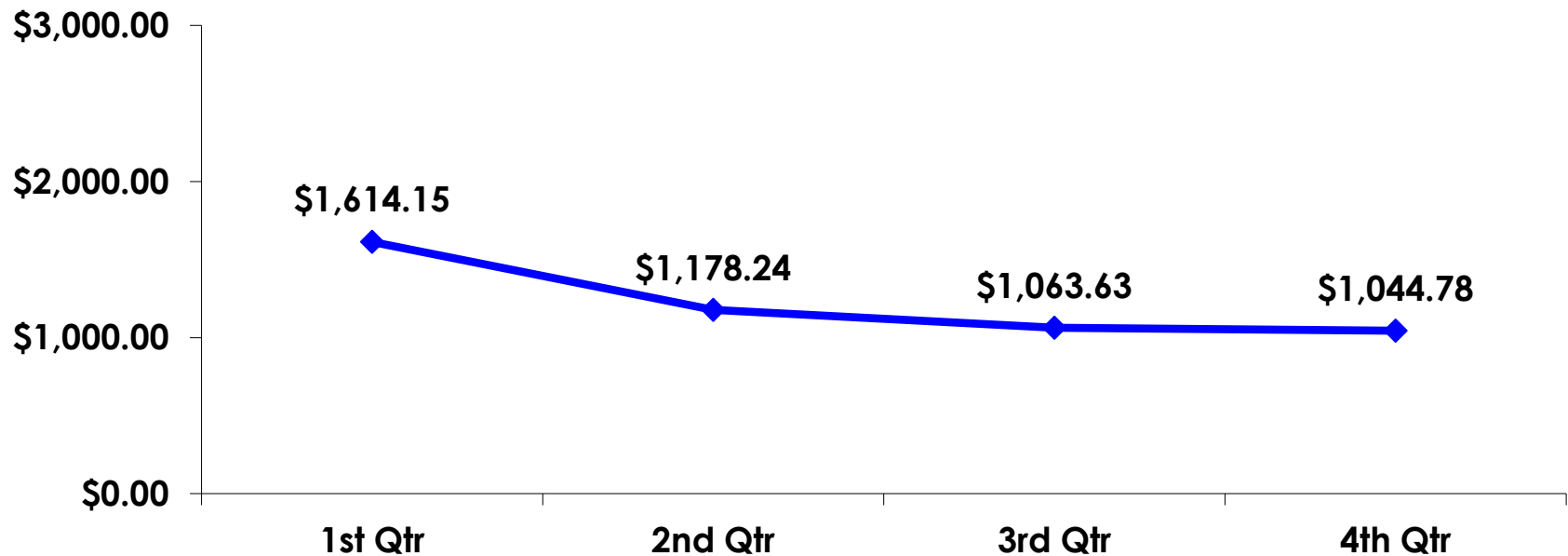
Mean=\$xxx per travel party

On-Island Expenditures

- \$2,019.41 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$13,750 = Maximum (highest amount recorded for the entire sample)
- \$1,044.78 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person



YTD = \$1,225.85

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	\$1,044.78	\$987.85	\$1,098.75	\$1,348.00	\$685.24	\$1,075.70	\$865.91	\$1,402.50	\$1,076.67	\$1,108.53	\$1,001.67
	Median	\$775	\$750	\$800	\$1,130	\$600	\$800	\$750	\$1,805	\$775	\$800	\$920
	Minimum	\$0	\$333	\$0	\$500	\$337	\$333	\$533	\$0	\$0	\$295	\$440
	Maximum	\$5,170	\$5,000	\$5,170	\$2,860	\$1,250	\$5,000	\$1,750	\$2,000	\$5,170	\$4,020	\$1,900

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$114.50	\$152.60	\$78.38	\$11.11	\$93.54	\$138.86	\$108.10
	Median	\$0	\$50	\$0	\$0	\$50	\$0	\$100
F&B FF/STORE	Mean	\$85.37	\$83.77	\$86.88	\$125.56	\$71.22	\$79.56	\$117.62
	Median	\$95	\$90	\$100	\$130	\$90	\$90	\$100
F&B RESTRNT	Mean	\$325.03	\$321.10	\$328.77	\$272.22	\$304.15	\$353.73	\$280.48
	Median	\$350	\$350	\$350	\$240	\$300	\$350	\$280
OPT TOUR	Mean	\$280.03	\$288.42	\$272.08	\$270.00	\$241.95	\$313.99	\$230.95
	Median	\$300	\$300	\$300	\$300	\$300	\$300	\$250
GIFT- SELF	Mean	\$688.60	\$621.85	\$751.88	\$757.78	\$505.61	\$807.47	\$569.05
	Median	\$350	\$350	\$400	\$270	\$300	\$400	\$300
GIFT- OTHER	Mean	\$353.60	\$358.36	\$349.09	\$397.78	\$321.95	\$356.46	\$385.71
	Median	\$250	\$250	\$250	\$200	\$250	\$250	\$250
TRANS	Mean	\$87.37	\$117.95	\$58.38	\$5.56	\$92.68	\$101.08	\$60.48
	Median	\$15	\$50	\$0	\$0	\$50	\$50	\$0
OTHER	Mean	\$110.81	\$167.95	\$56.64	\$32.22	\$96.83	\$146.09	\$39.05
	Median	\$0	\$0	\$0	\$0	\$50	\$0	\$0
TOTAL	Mean	\$2,019.41	\$2,114.93	\$1,928.84	\$1,872.22	\$1,727.93	\$2,248.68	\$1,789.05
	Median	\$1,600	\$1,620	\$1,600	\$1,600	\$1,600	\$1,680	\$1,500

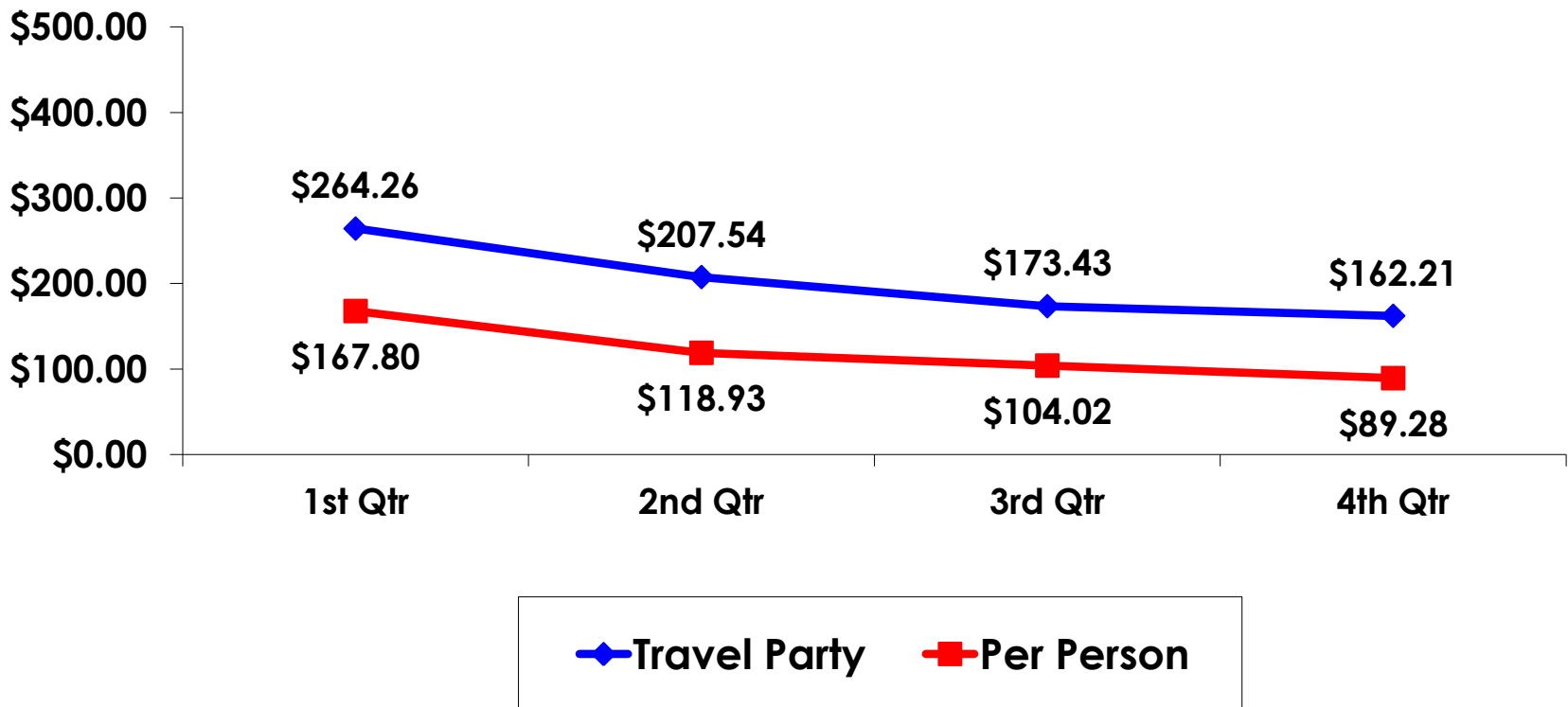
On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$114.50	\$117.76	\$96.52
	Median	\$0	\$0	\$50
F&B FF/STORE	Mean	\$85.37	\$88.19	\$69.78
	Median	\$95	\$100	\$75
F&B RESTRNT	Mean	\$325.03	\$312.17	\$396.09
	Median	\$350	\$300	\$400
OPT TOUR	Mean	\$280.03	\$275.12	\$307.17
	Median	\$300	\$300	\$300
GIFT- SELF	Mean	\$688.60	\$597.56	\$1,191.30
	Median	\$350	\$300	\$1,000
GIFT- OTHER	Mean	\$353.60	\$312.52	\$580.43
	Median	\$250	\$250	\$400
TRANS	Mean	\$87.37	\$73.50	\$163.91
	Median	\$15	\$0	\$100
OTHER	Mean	\$110.81	\$116.14	\$81.35
	Median	\$0	\$0	\$10
TOTAL	Mean	\$2,019.41	\$1,897.44	\$2,692.87
	Median	\$1,600	\$1,550	\$2,300

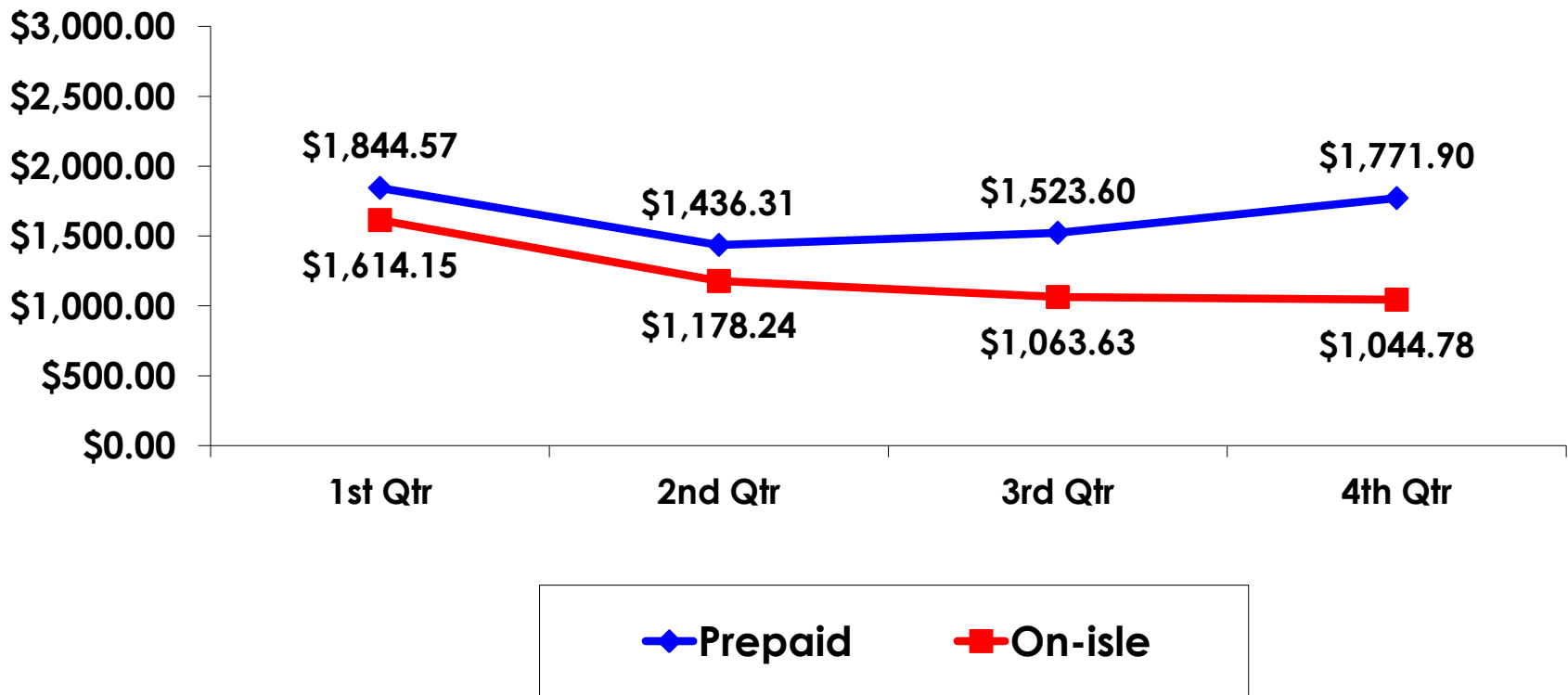
ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$201.89 Per Person YTD = \$120.04



PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$1,644.43 On-Isle YTD = \$1,225.85

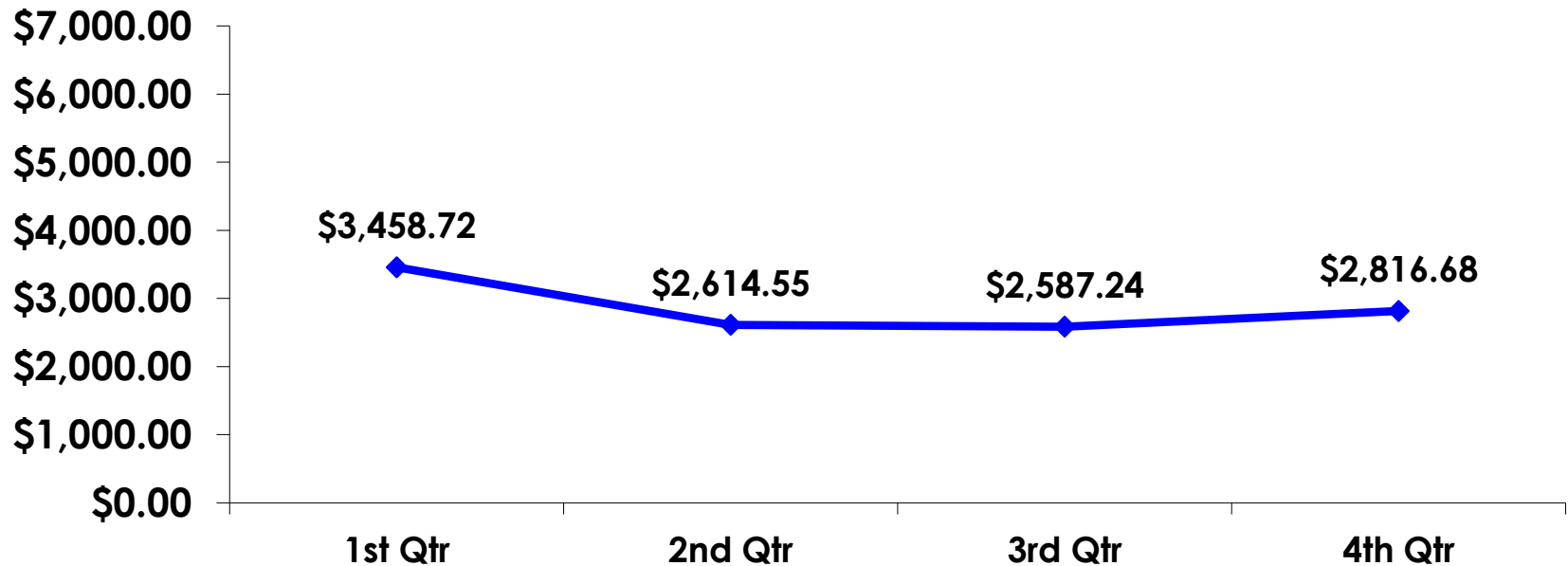


Total Expenditures Per Person (Prepaid & On-Island)

- \$2,816.68 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,727 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES

Per Person



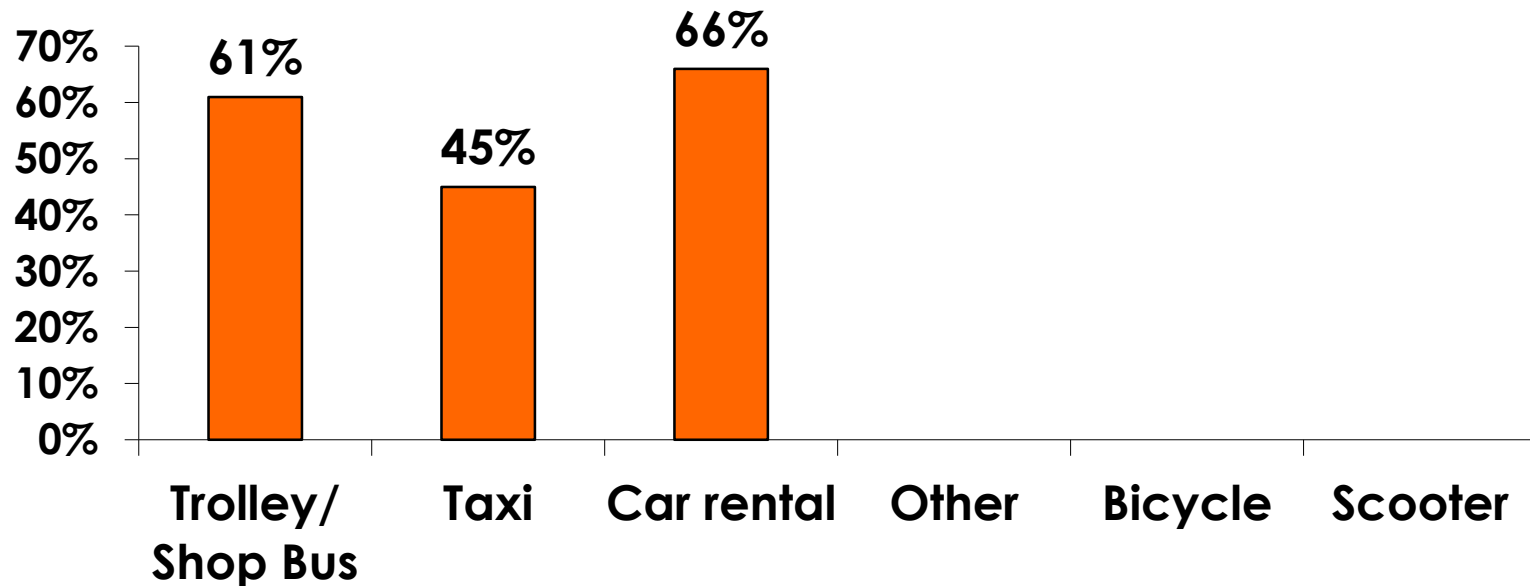
YTD=\$2,870.28

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$114.50
Food & beverage in fast food restaurant/convenience store	\$85.37
Food & beverage at restaurants or drinking establishments outside a hotel	\$325.03
Optional tours and activities	\$280.03
Gifts/ souvenirs for yourself/companions	\$688.60
Gifts/ souvenirs for friends/family at home	\$353.60
Local transportation	\$87.37
Other expenses not covered	\$110.81
Average Total	\$2,019.41

Local Transportation

n=56



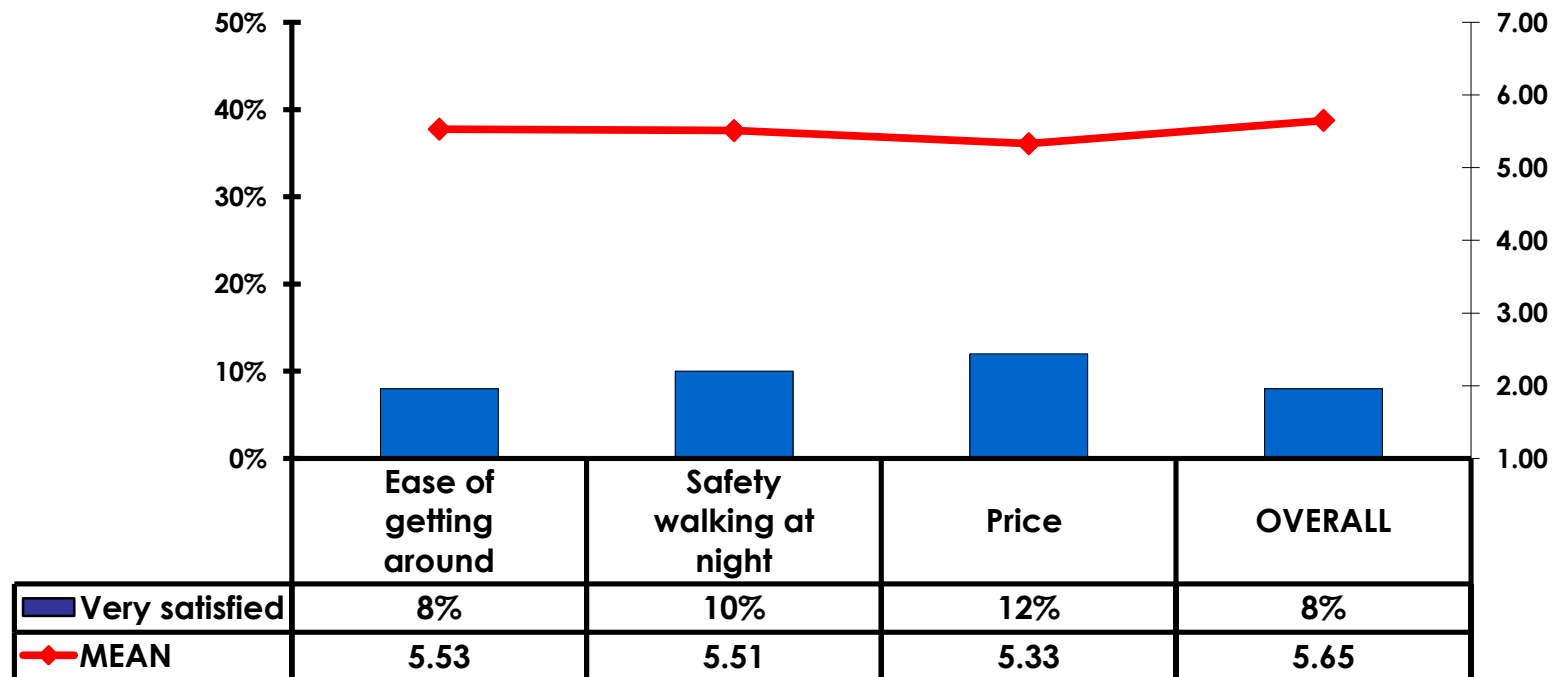
Mean=\$87.37 per travel party

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

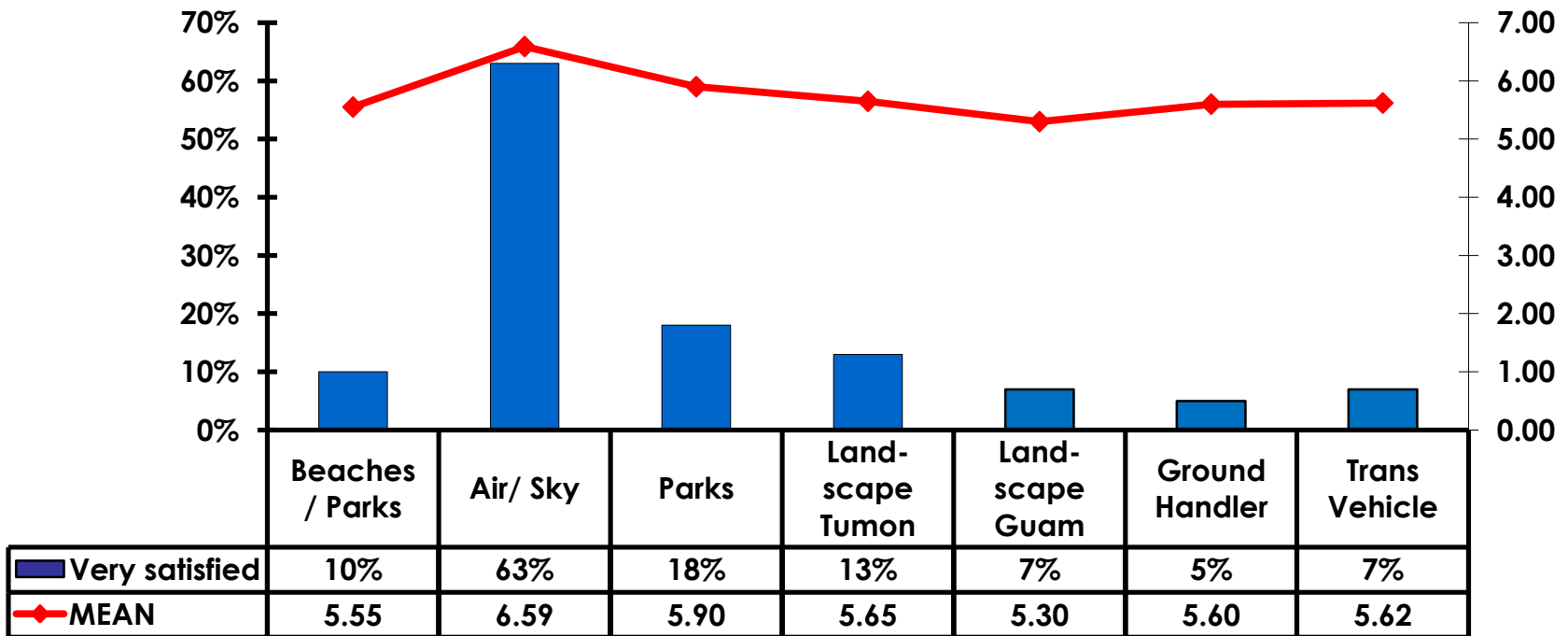
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

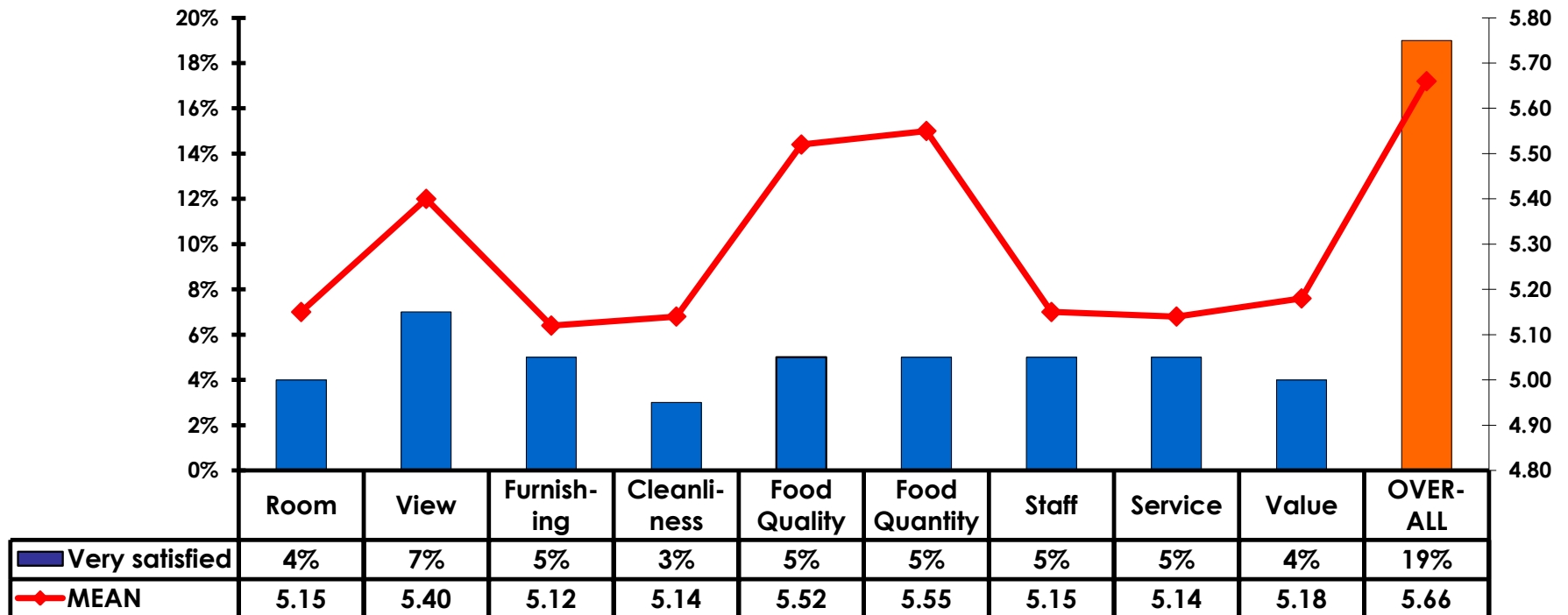
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

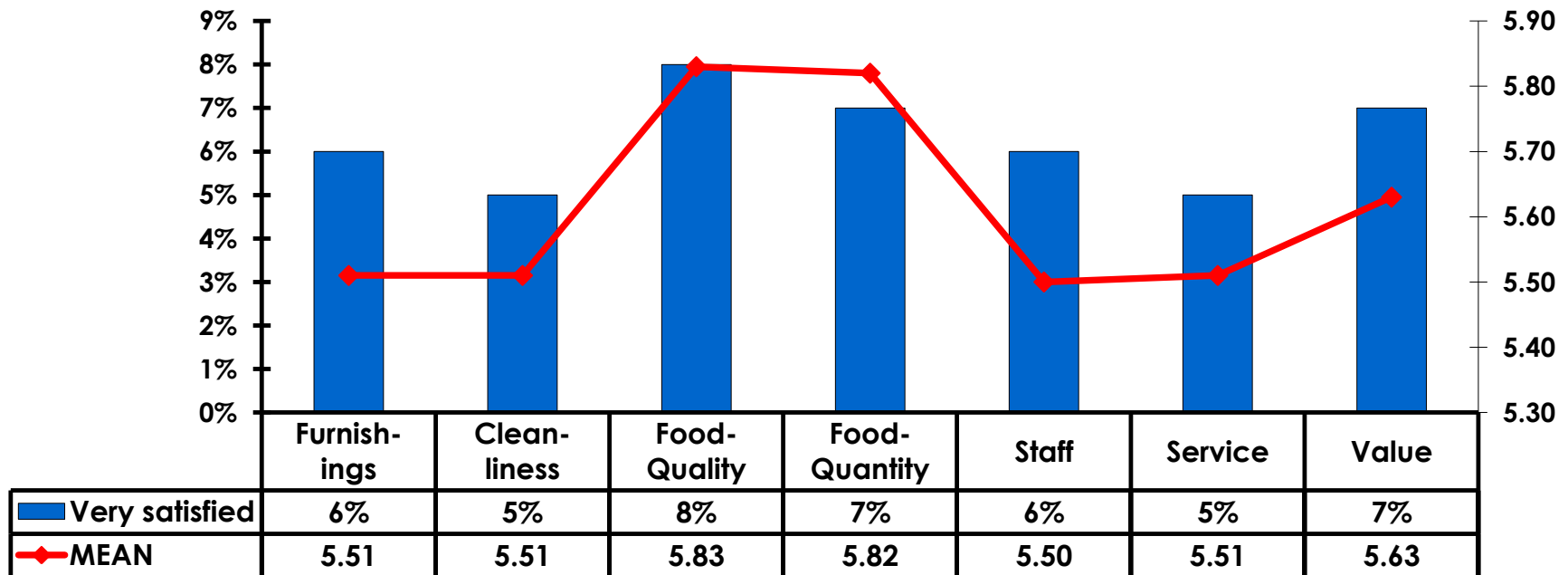
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

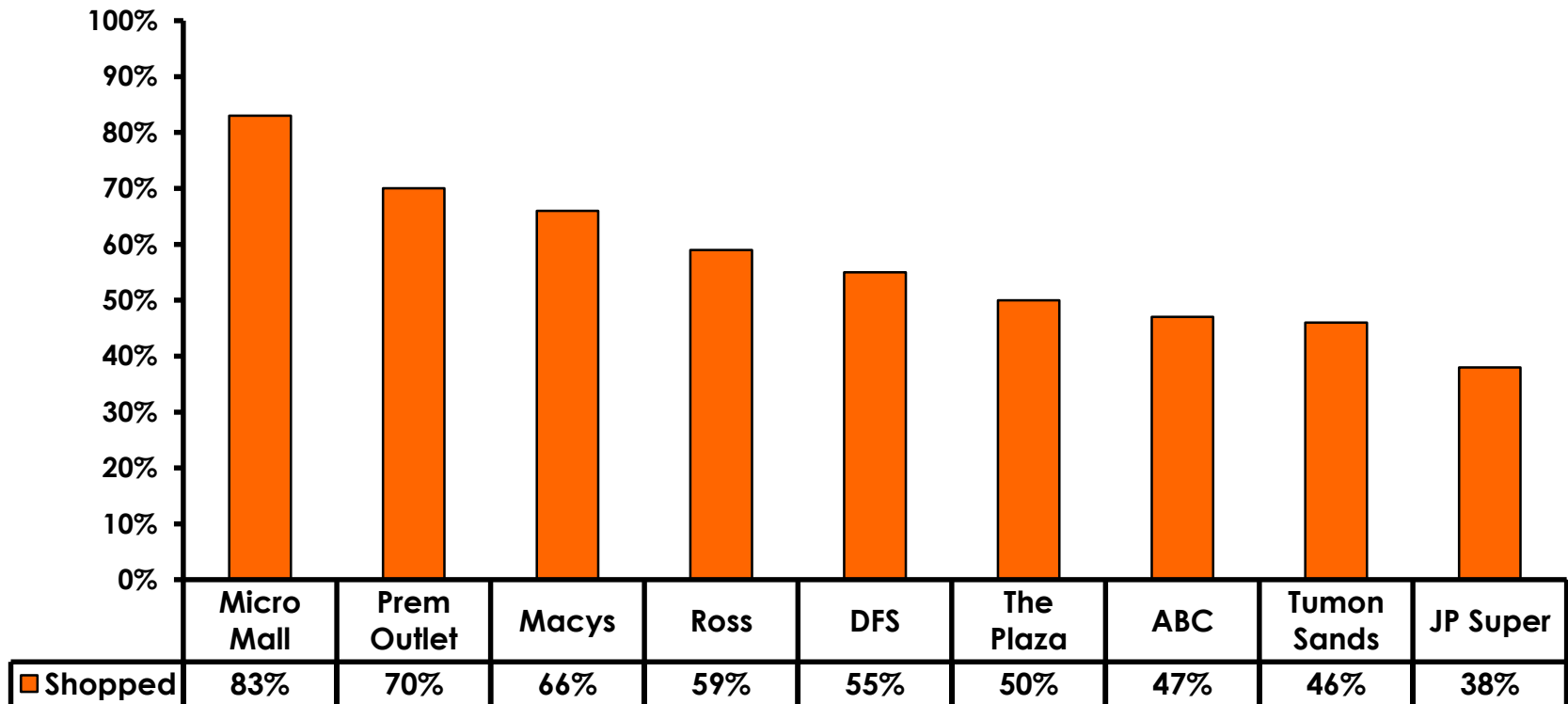
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

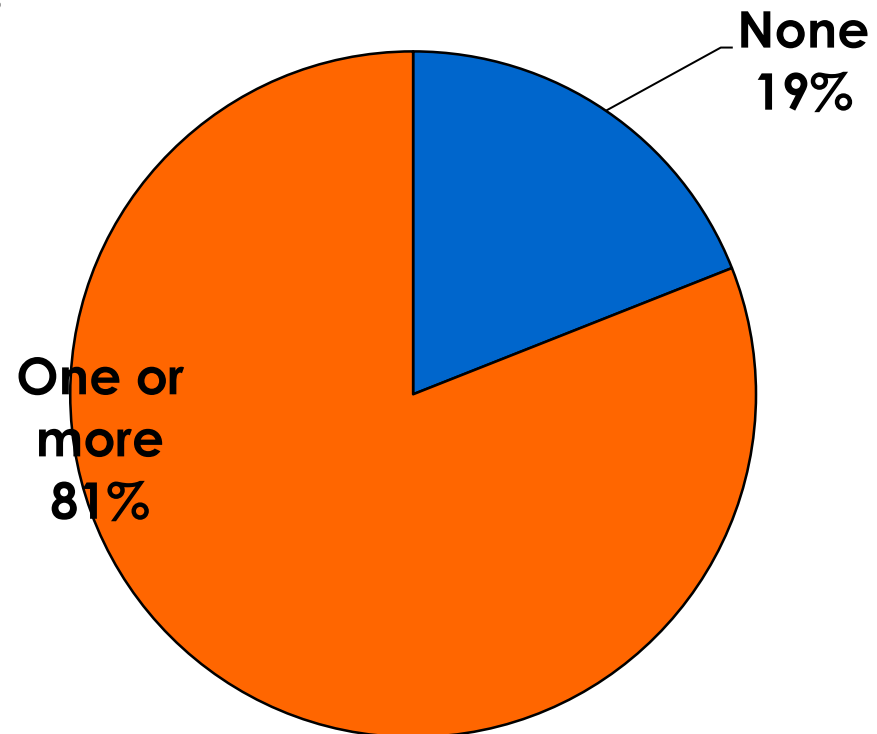
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 45%	Score of 6 to 7 = 37%
Score of 4 to 5 = 52%	Score of 4 to 5 = 57%
Score 1 to 3 = 3%	Score 1 to 3 = 6%
MEAN = 5.40	MEAN = 5.19

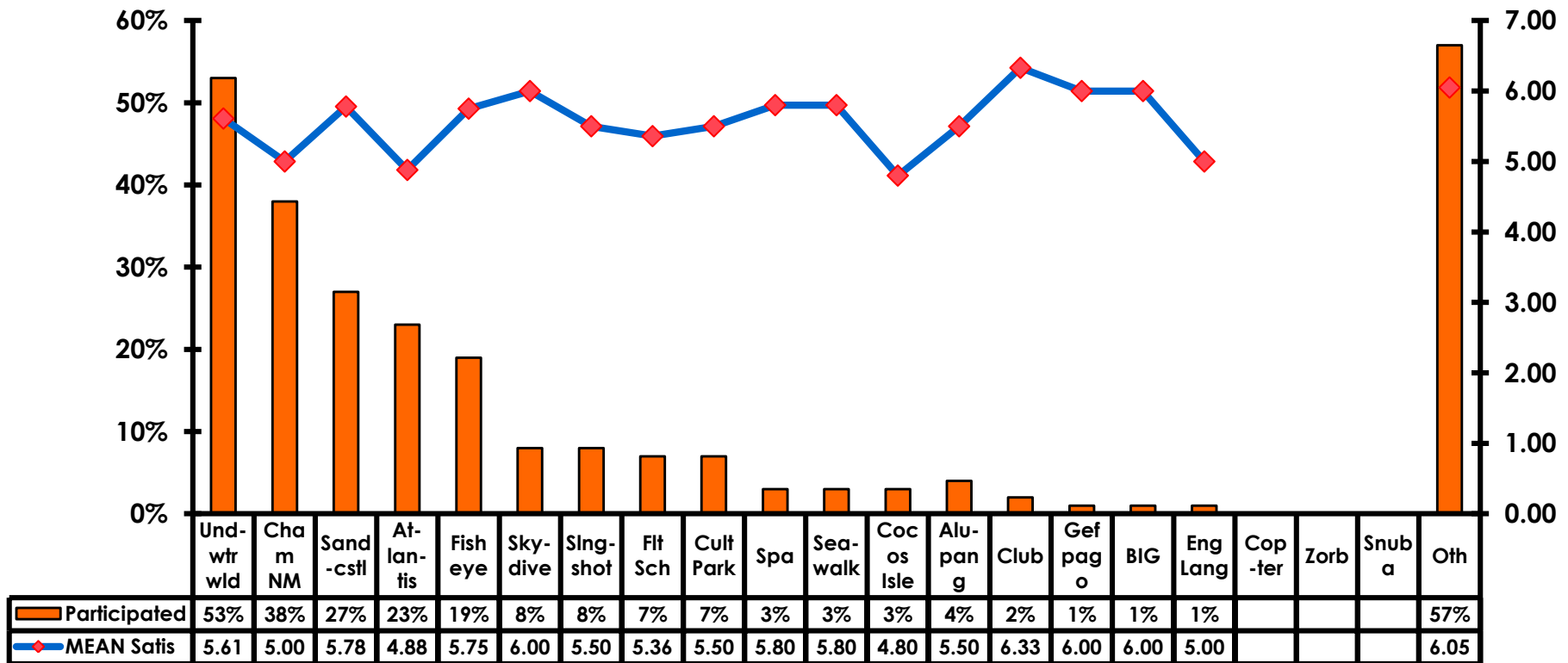
Optional Tour Participation

- Average number of tours participated in is 2.50



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 = 58%	Score of 6 to 7 = 17%
Score of 4 to 5 = 36%	Score of 4 to 5 = 61%
Score 1 to 3 = 5%	Score 1 to 3 = 4%
MEAN = 5.66	MEAN = 4.23

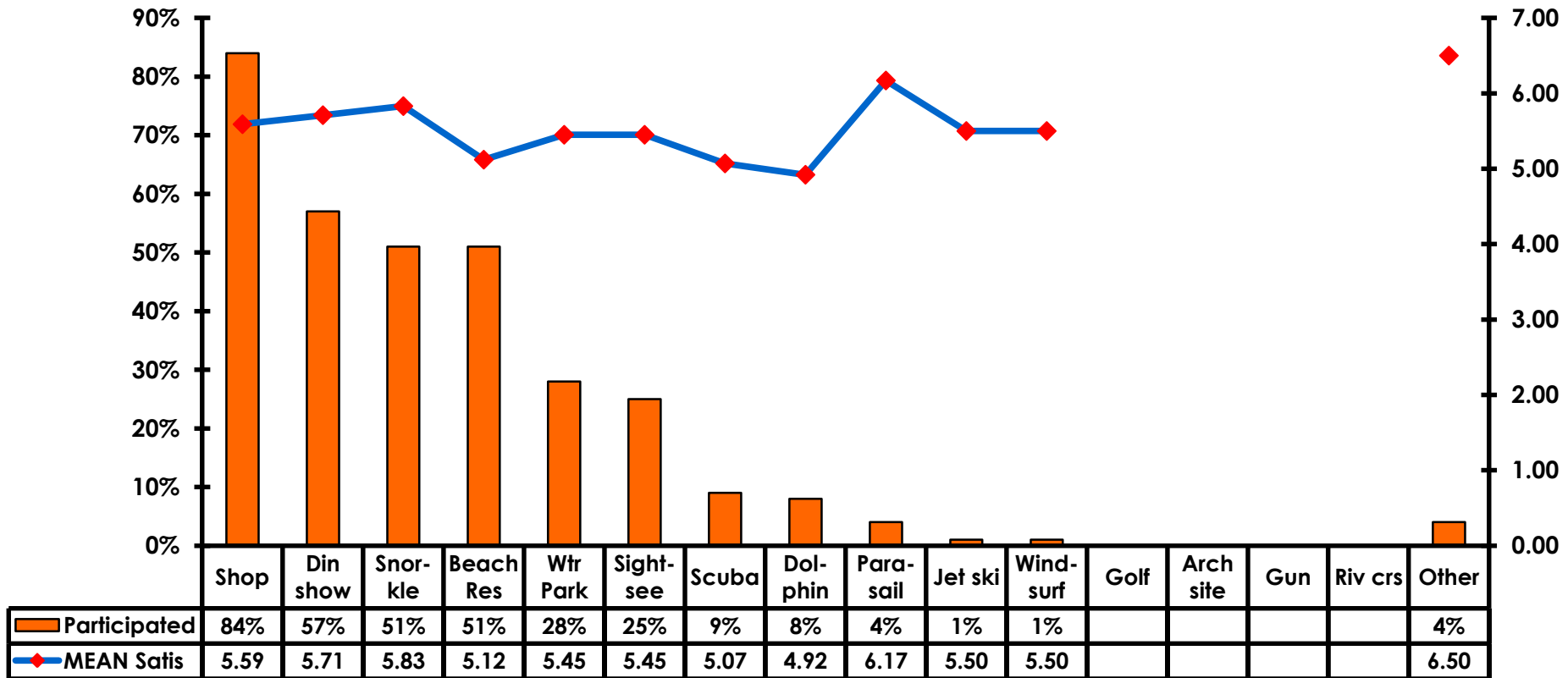
Night Tours Satisfaction

7pt Rating Scale

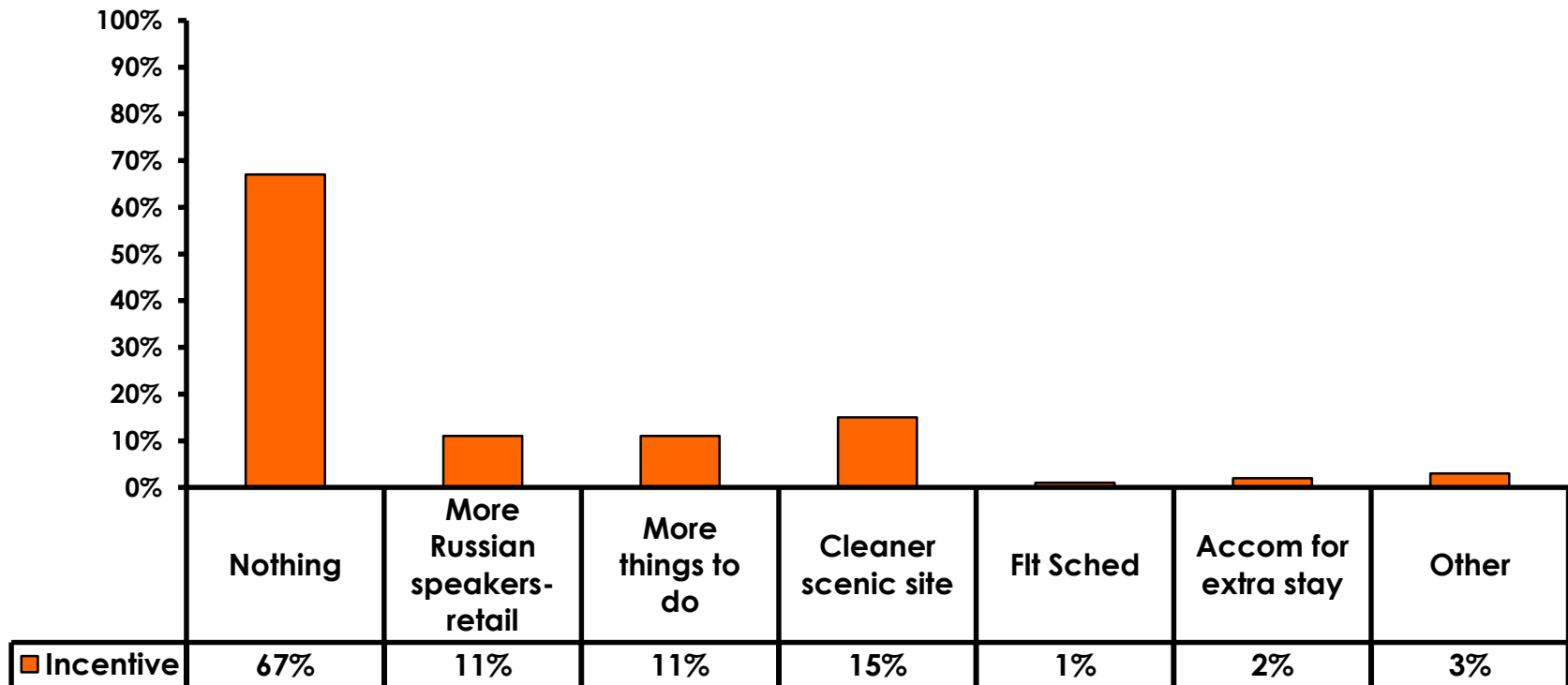
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 32%	Score of 6 to 7 = 22%
Score of 4 to 5 = 53%	Score of 4 to 5 = 57%
Score 1 to 3 = 16%	Score 1 to 3 = 22%
MEAN = 4.94	MEAN = 4.54

Satisfaction with Other Activities



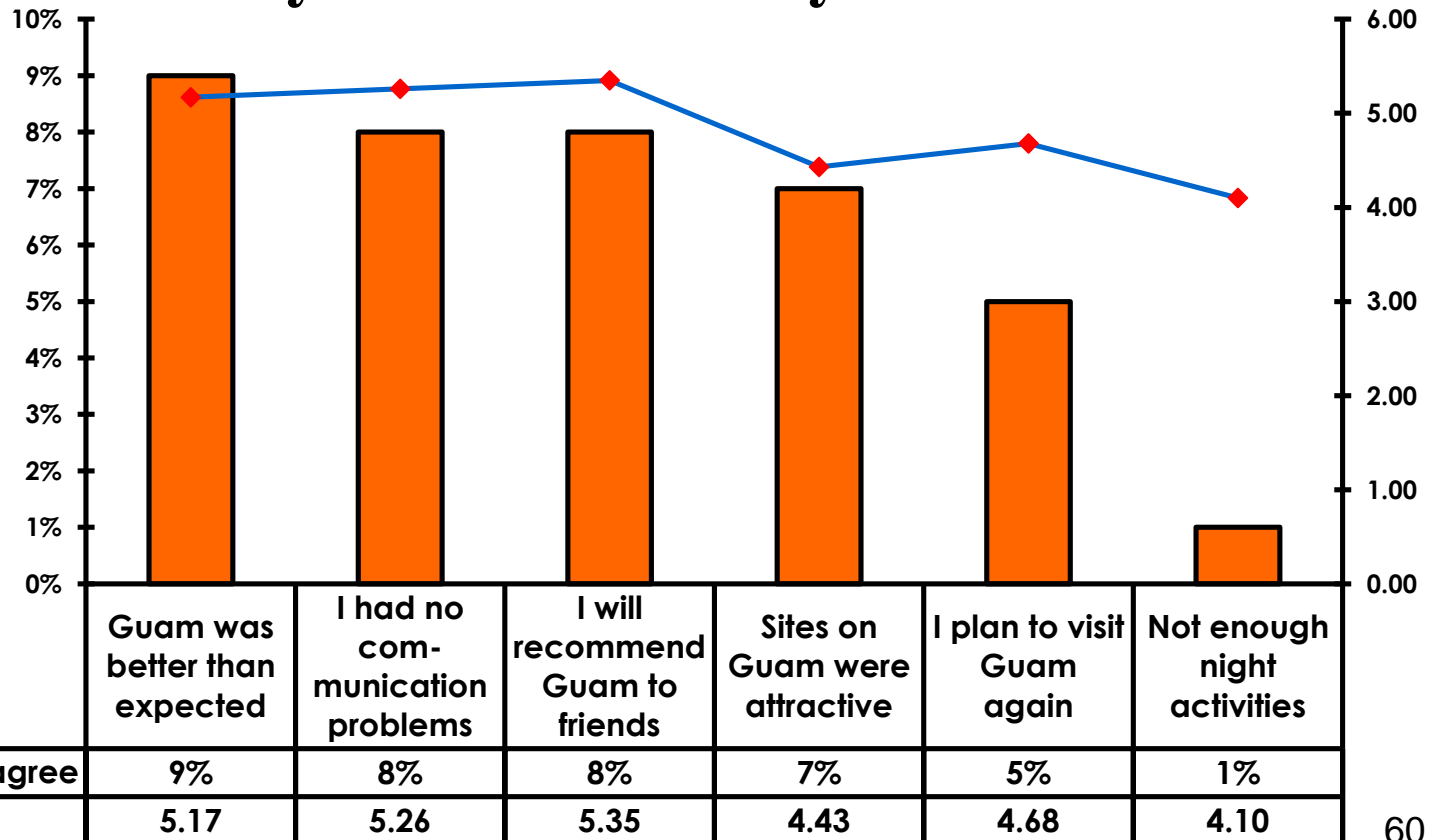
What would it take to make Guam more enjoyable for families?



On-Island Perceptions

7pt Rating Scale

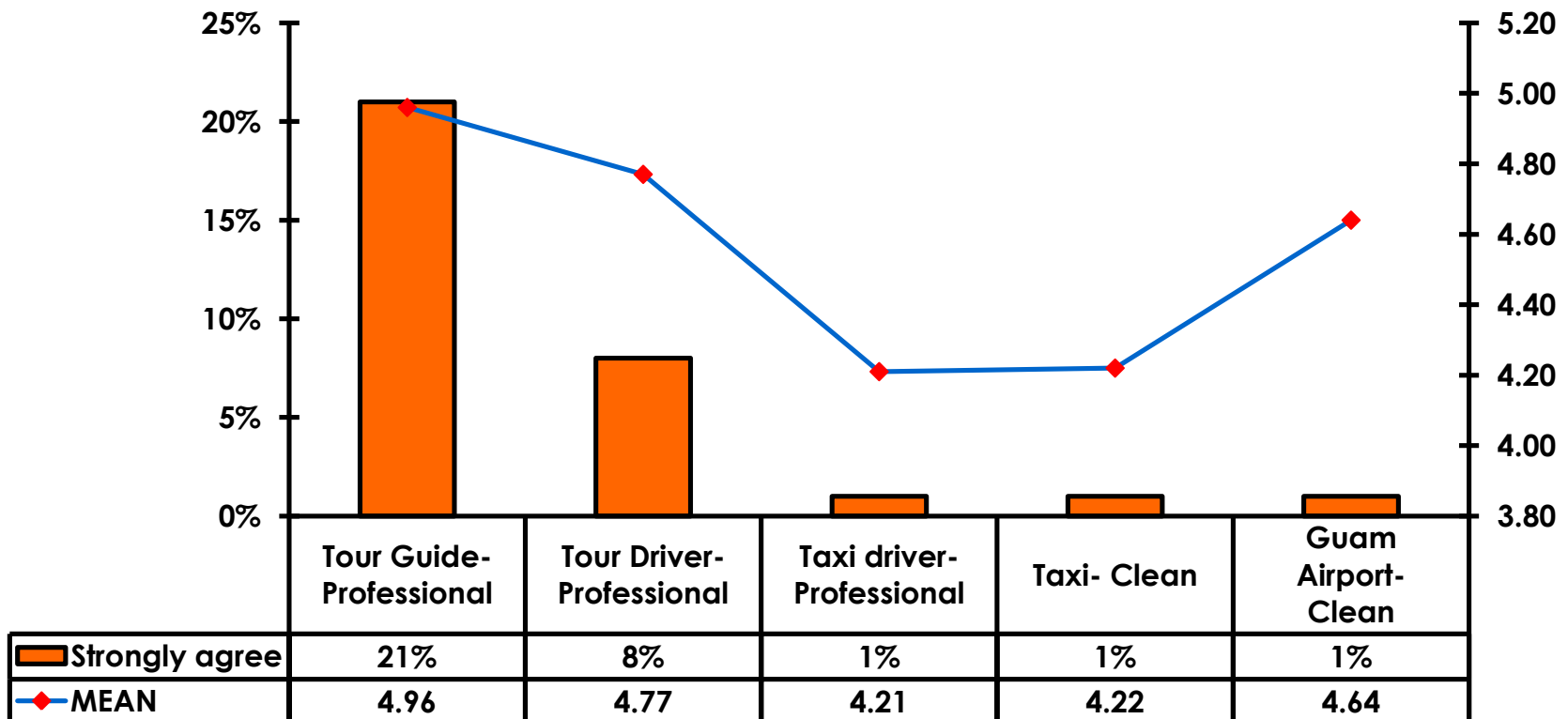
7=Very Satisfied/ 1=Very Dissatisfied



Transportation

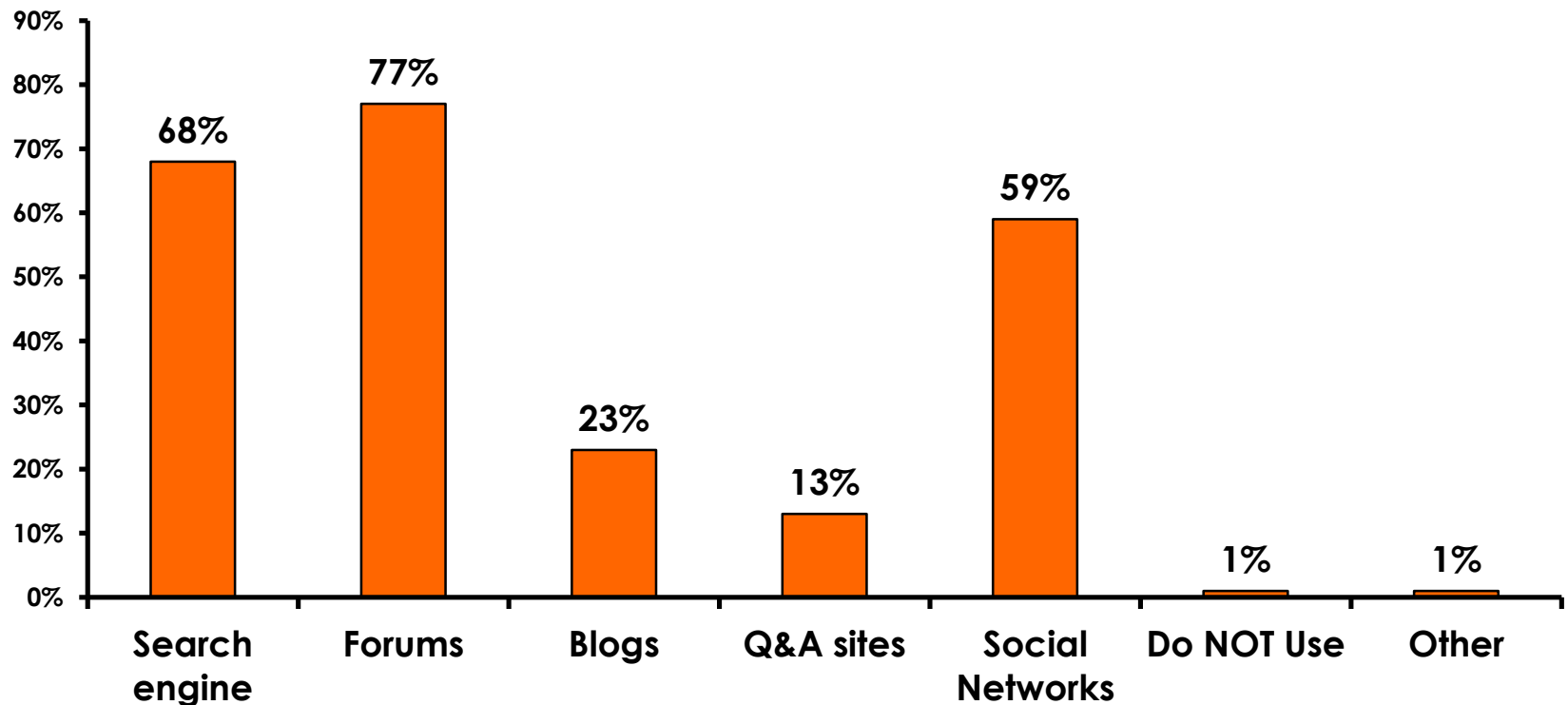
7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



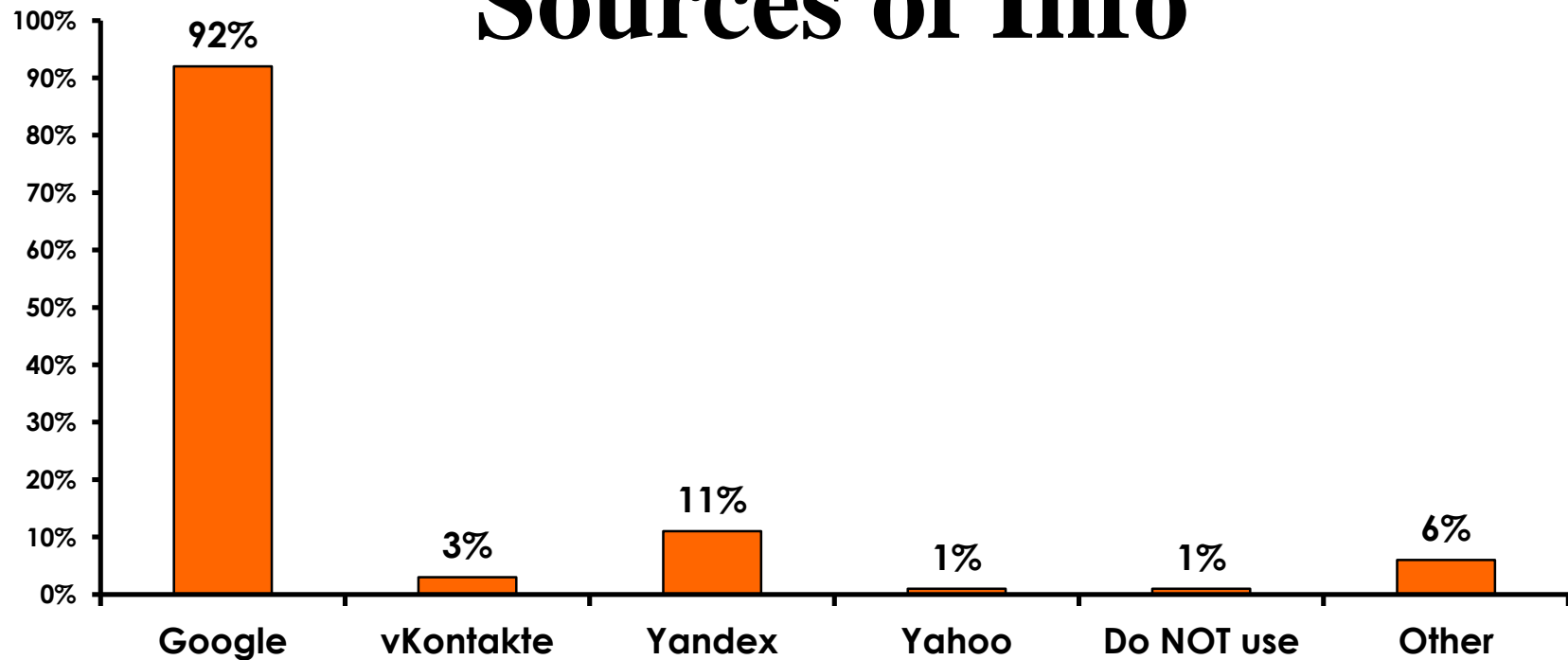
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

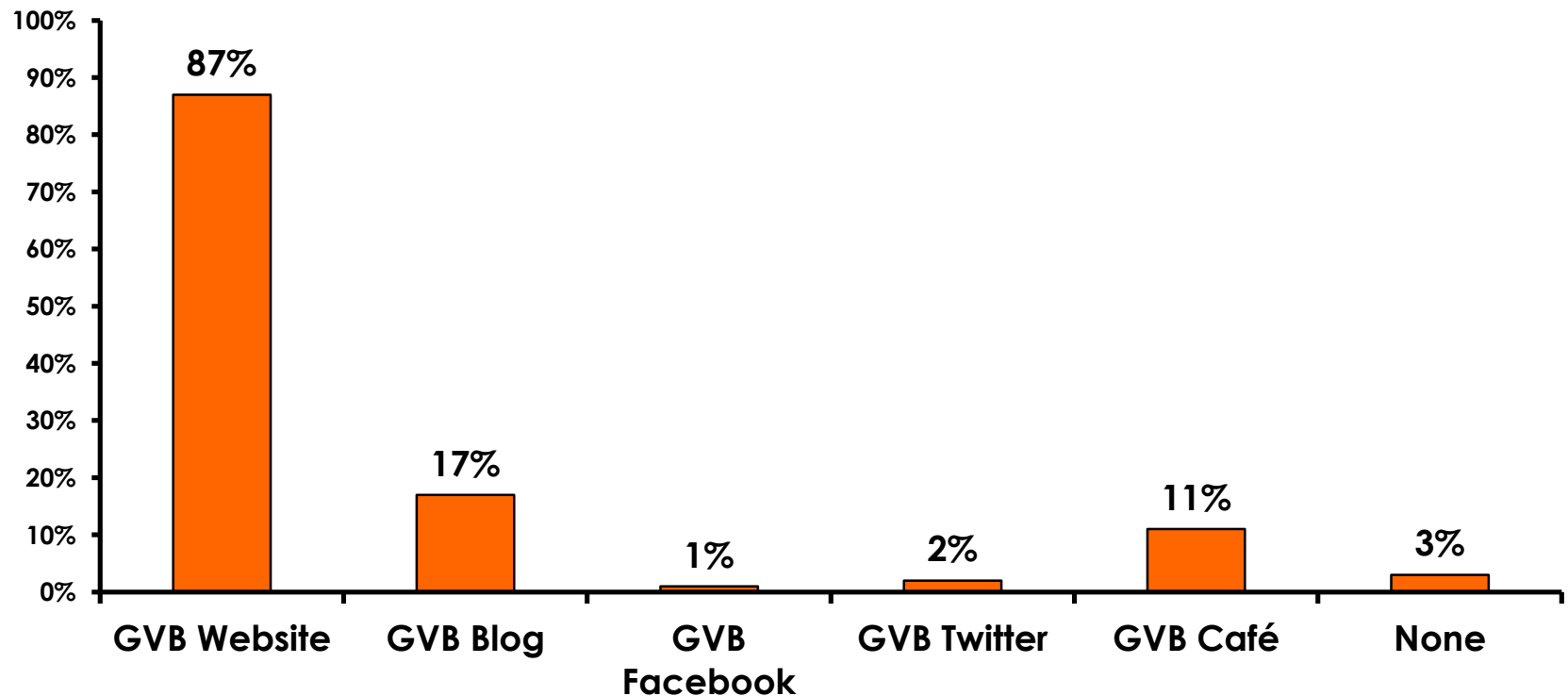


Internet- Things To Do

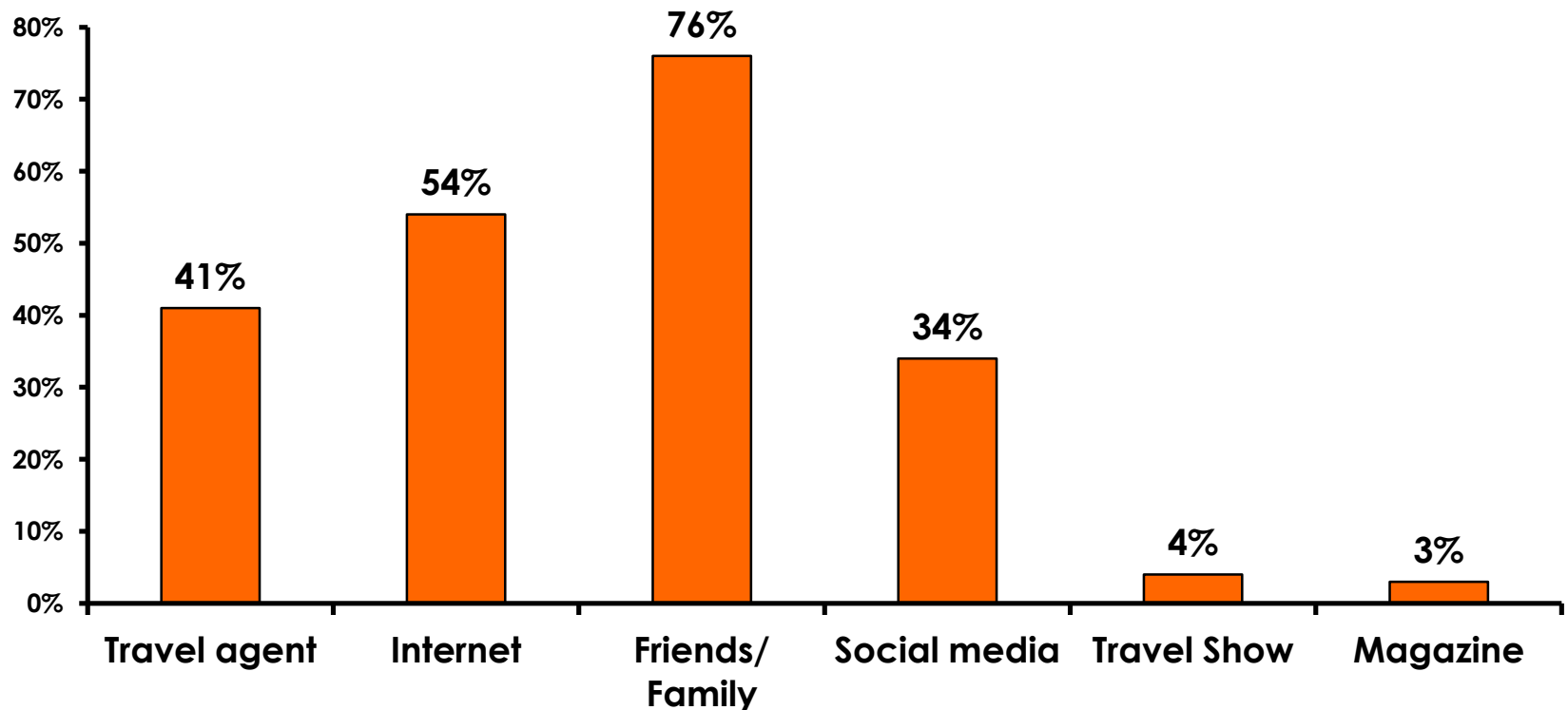
Sources of Info



Internet- GVB Sources

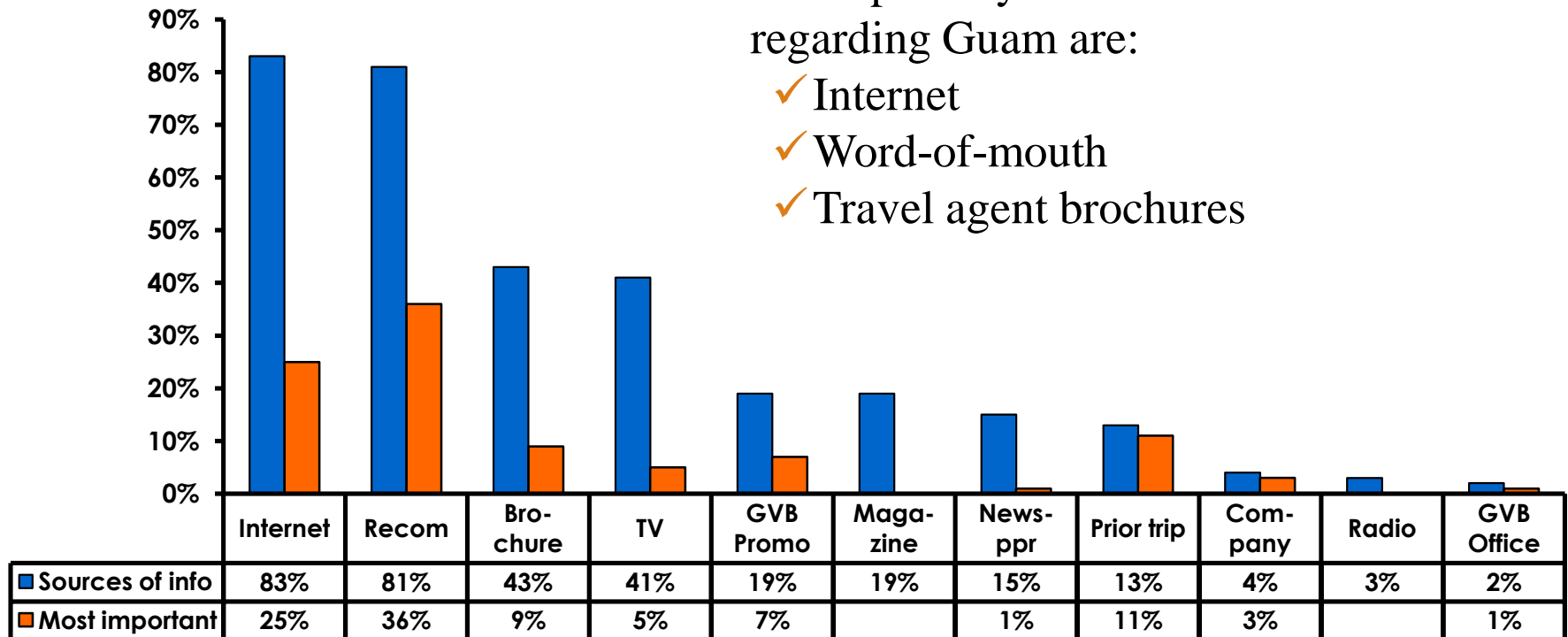


Travel Motivation- Info Sources



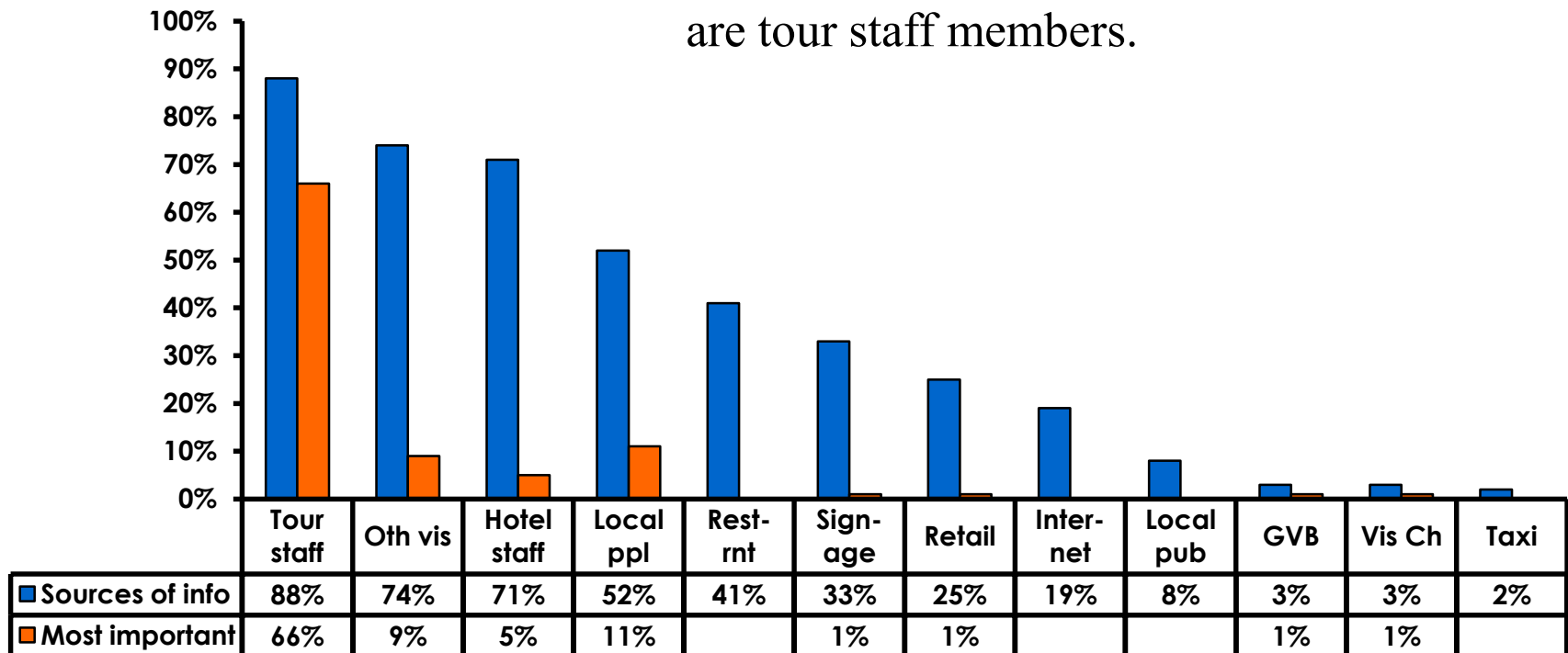
Sources of Information Pre-arrival

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



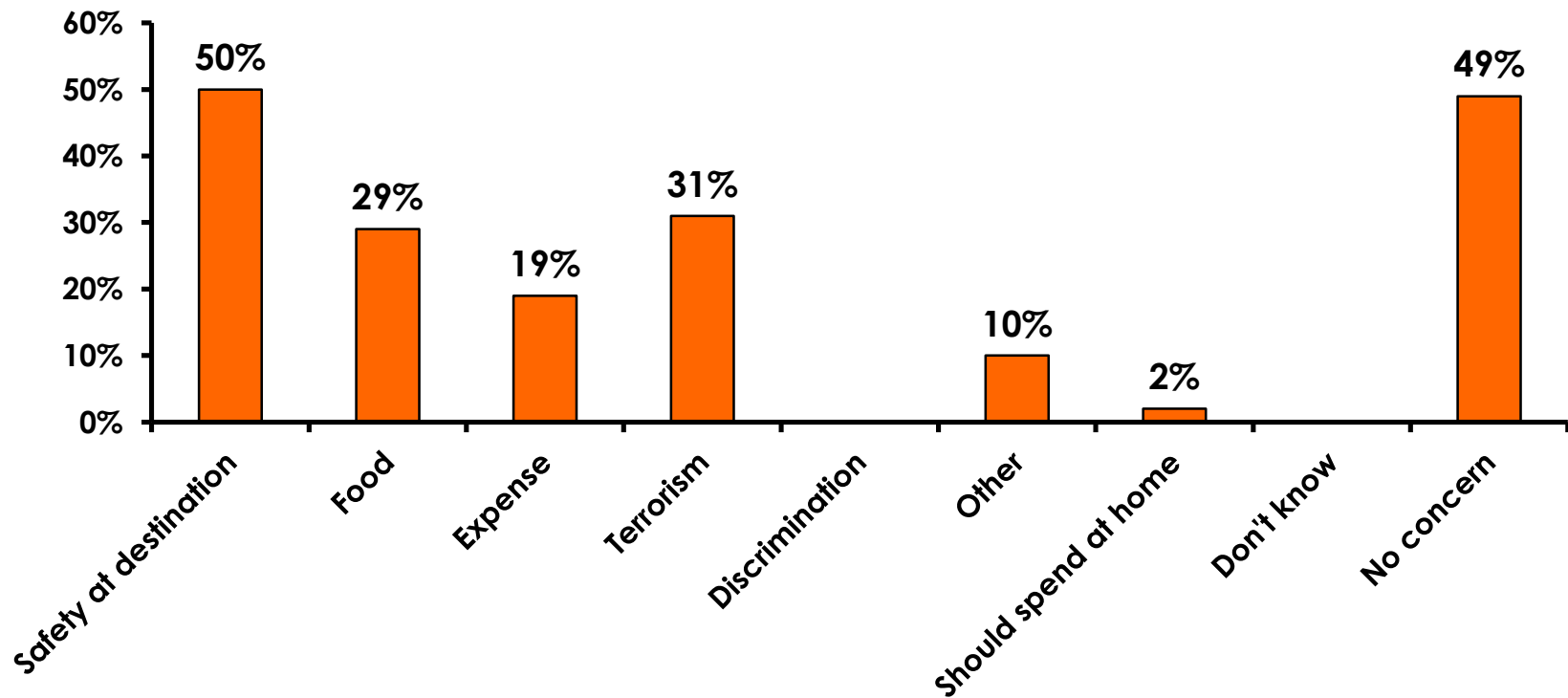
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

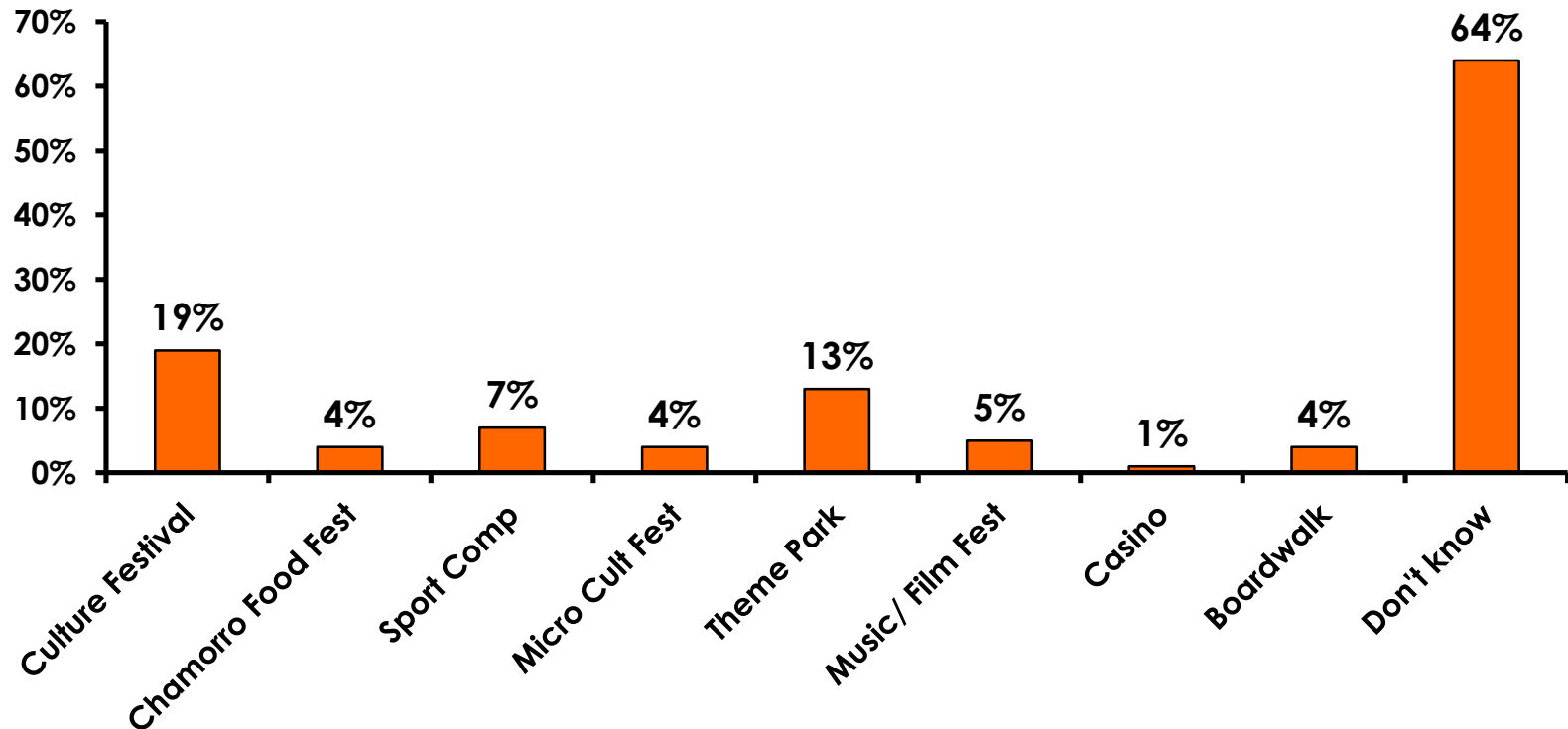
Concerns about travel outside of Russia - Overall



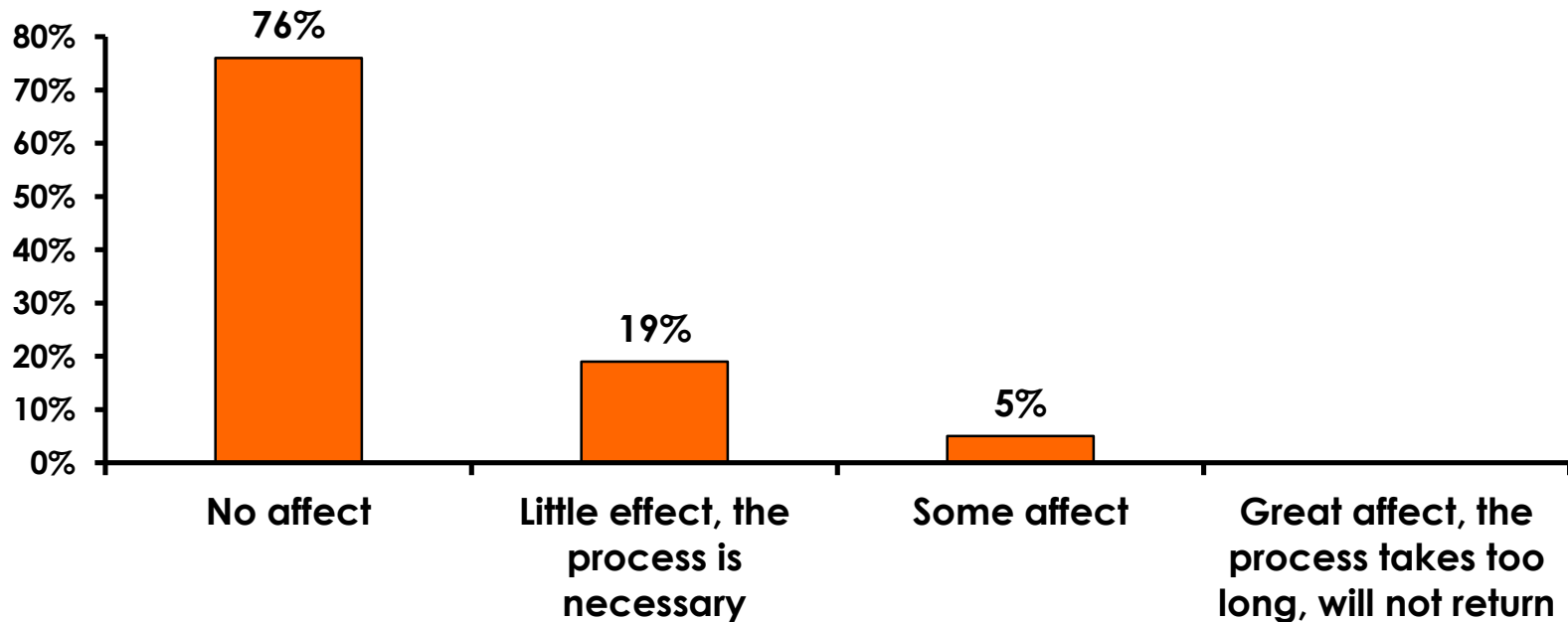
Concerns about travel outside of Russia - By Age & Income

		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	50%	33%	51%	54%	38%	38%	58%	63%	25%	40%	29%	33%	50%	
	No concerns	49%	67%	46%	46%	57%	63%	42%	35%	70%	60%	71%	67%	50%	
	Terrorism	31%	33%	22%	35%	33%	25%	38%	38%	20%	13%	29%	33%	50%	
	Food	29%		44%	27%	19%	13%	29%	45%	10%	20%	29%	33%		
	Expense	19%		12%	25%	19%	13%	33%	18%	5%	13%	14%			
	Other	10%		5%	13%	14%	13%	13%	18%	5%					
	Should spend at home	2%		2%	3%			4%	3%						
	Total	Count	150	9	41	79	21	8	48	40	20	15	7	3	2

Activities/ Attractions- Appeal



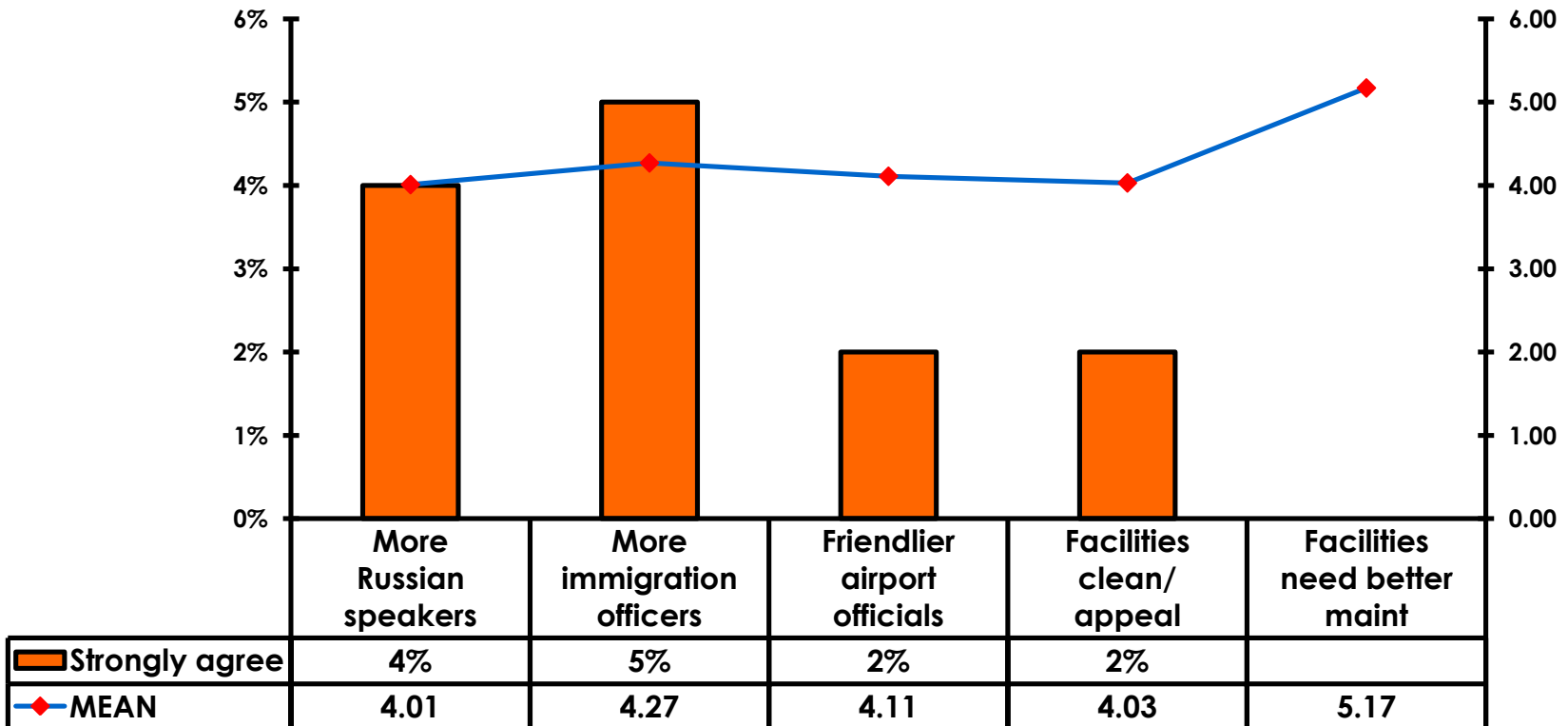
Security Screening/ Immigration Process at Guam International Airport



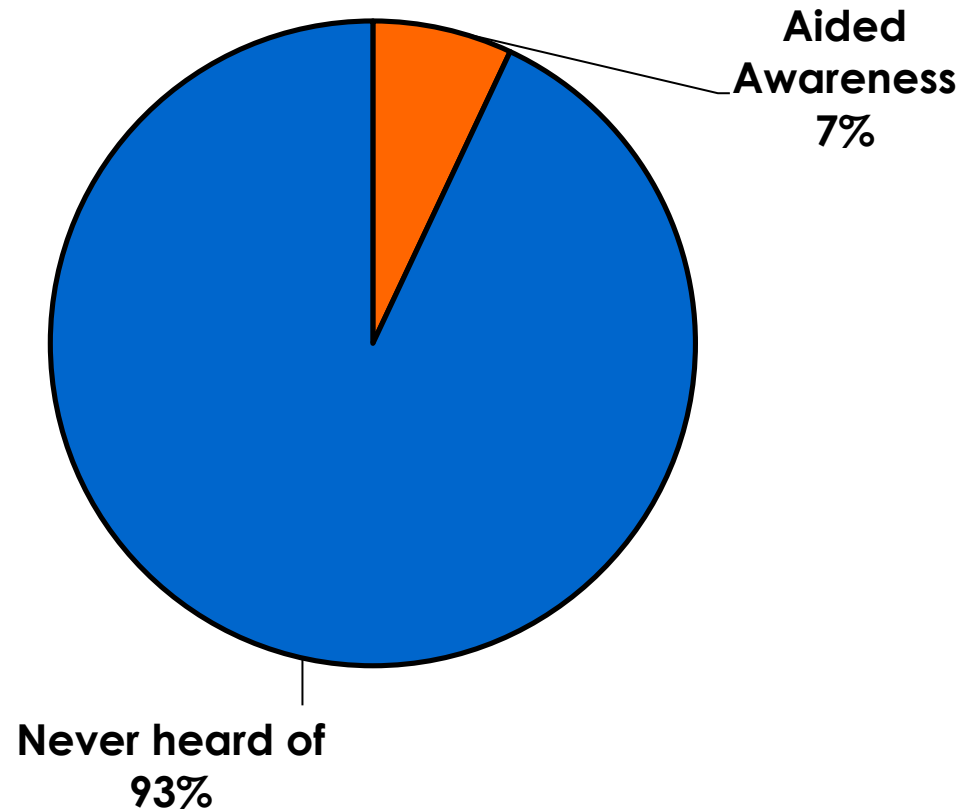
Airport Arrival Experience

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



Shop Guam Festival



Shop Guam Festival - Impact

n=13

