

GUAM VISITORS BUREAU Russia Visitor Tracker Exit Profile FY2015 2ND QTR. (JAN~MAR 2015)



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

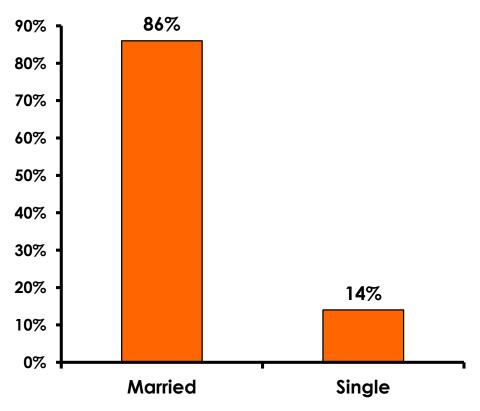
- To monitor the effectiveness of the Russian seasonal campaigns in attracting Russian visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Russian marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.



SECTION 1 PROFILE OF RESPONDENTS



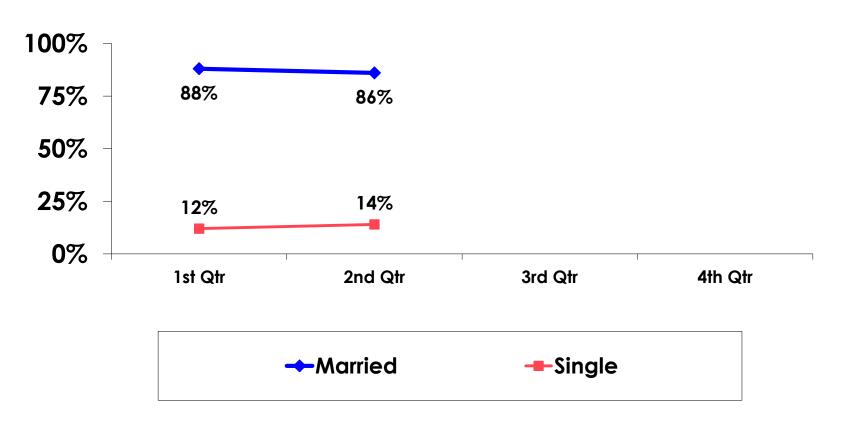
Marital Status - Overall



 Majority of Russian visitors are married.

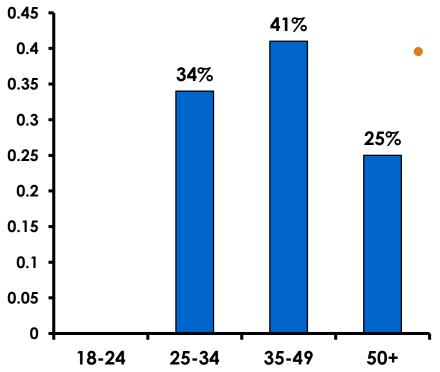


MARITAL STATUS





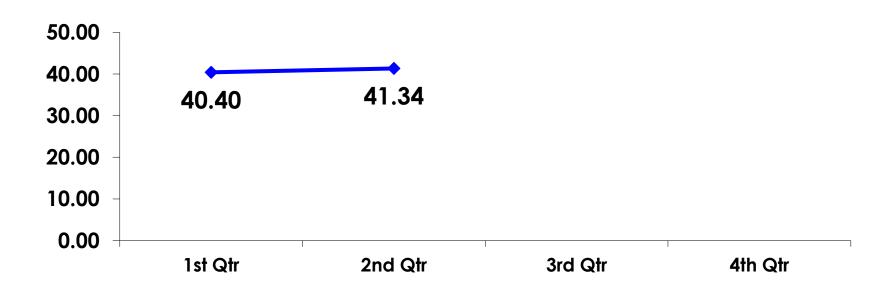
Age - Overall



The average age of the respondents is 41.34 years of age.

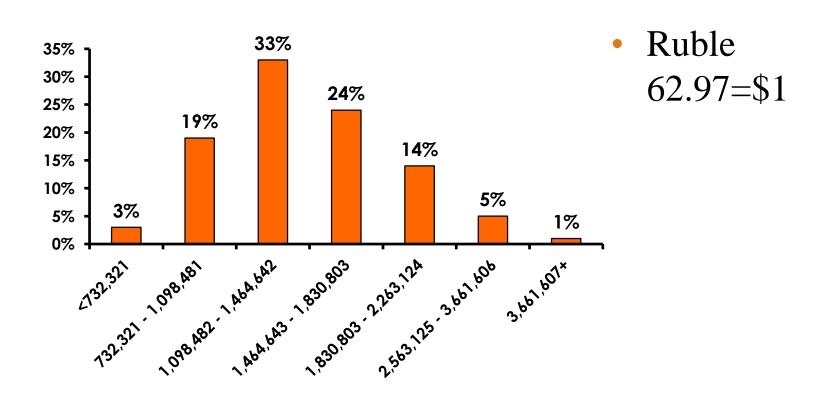


AVERAGE - AGE



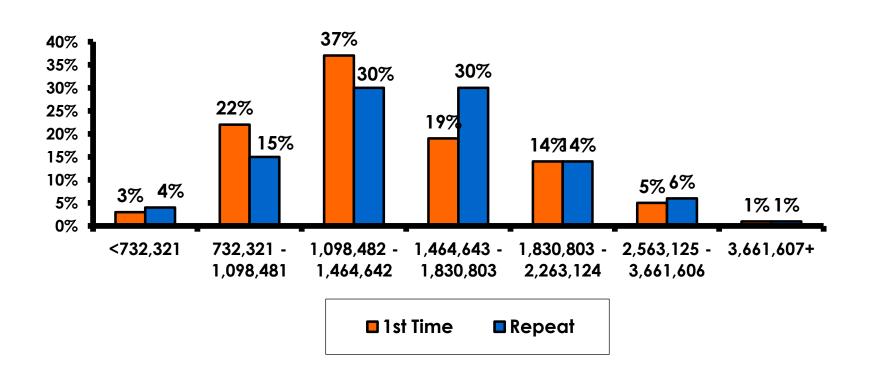


Personal Income





Personal Income – 1st time vs. repeat



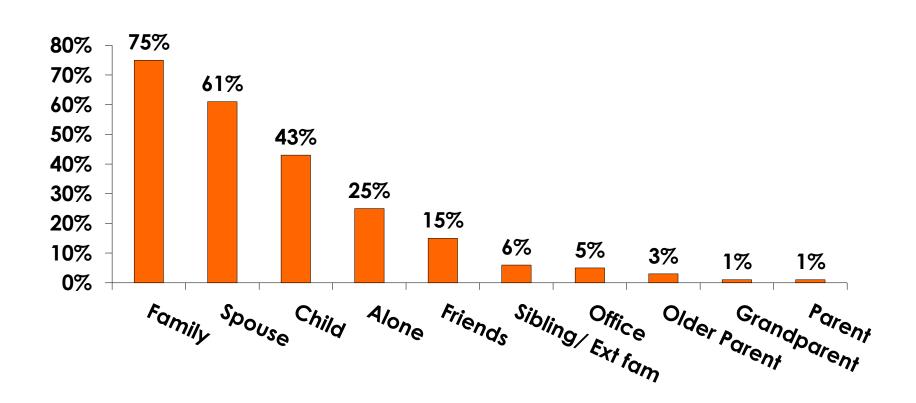


Personal Income by Gender & Age

			TOTAL	GEN	DER		AGE	
			-	Male	Female	25-34	35-49	50+
Q27	<732,321	Count	5	1	4			5
		Column N %	3%	1%	5%			14%
	732,321-1,098,481	Count	28	8	20	13	7	8
		Column N %	19%	10%	27%	25%	12%	22%
	1,098,482-1,464,642	Count	50	21	29	20	20	8
		Column N %	33%	27%	40%	39%	33%	22%
	1,464,643-1,830,803	Count	36	27	9	10	20	6
		Column N %	24%	35%	12%	20%	33%	16%
	1,830,803-2,263,124	Count	21	14	7	7	9	5
		Column N %	14%	18%	10%	14%	15%	14%
	2,563,125-3,661,606	Count	8	4	4	1	3	4
		Column N %	5%	5%	5%	2%	5%	11%
	3,661,607+	Count	2	2			1	1
		Column N %	1%	3%			2%	3%
	Total	Count	150	77	73	51	60	37



Travel Companions

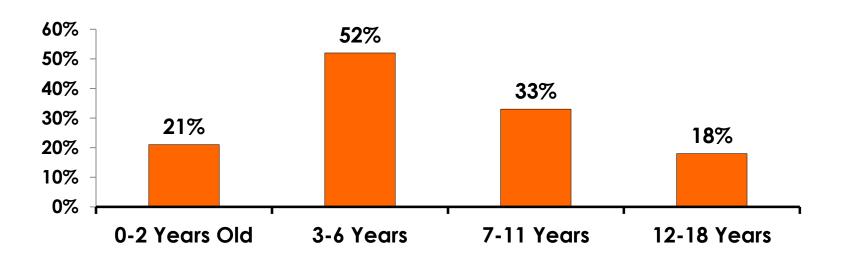




Number of Children Travel Party

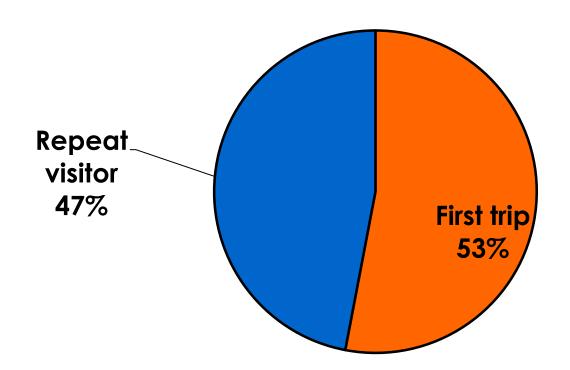
N=65 total respondents traveling with children.

(Of those N=65 respondents, there is a total of 77 children 18 years or younger)



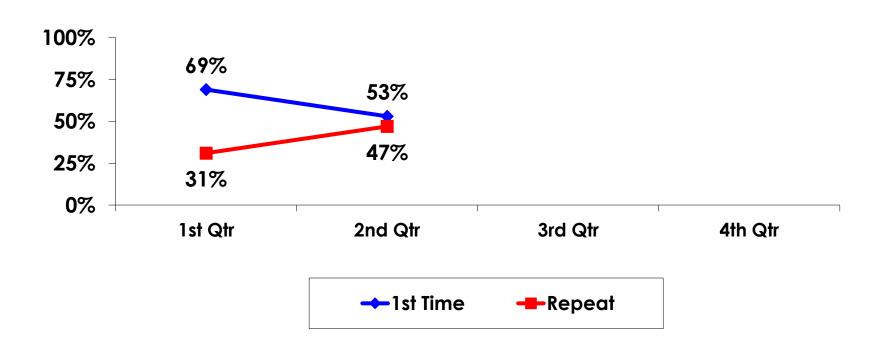


Prior Trips to Guam





PRIOR TRIPS TO GUAM





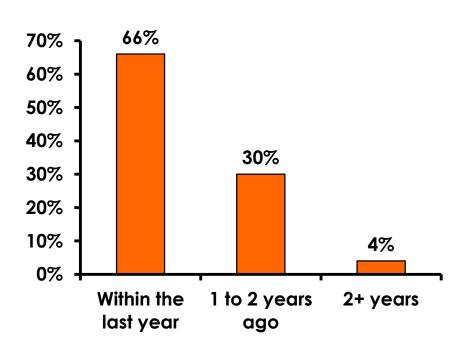
Trips to Guam by Age & Gender

			TOTAL	TRIPS T	O GUAM
			1	1st	Repeat
GENDER	Male	Count	77	45	32
		Column N %	51%	57%	45%
	Female	Count	73	34	39
		Column N %	49%	43%	55%
	Total	Count	150	79	71
AGE	25-34	Count	51	27	24
		Column N %	34%	35%	34%
	35-49	Count	60	31	29
		Column N %	41%	40%	41%
	50+	Count	37	19	18
		Column N %	25%	25%	25%
	Total	Count	148	77	71



Repeat Visitors Last Trip

n = 71

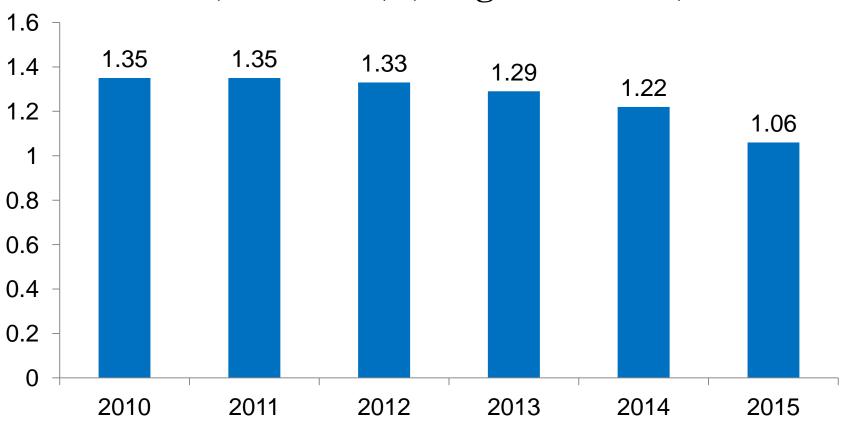


- The average repeat visitor has been to Guam 1.54 times.
- A majority of the repeat visitors have been to Guam within the last year.



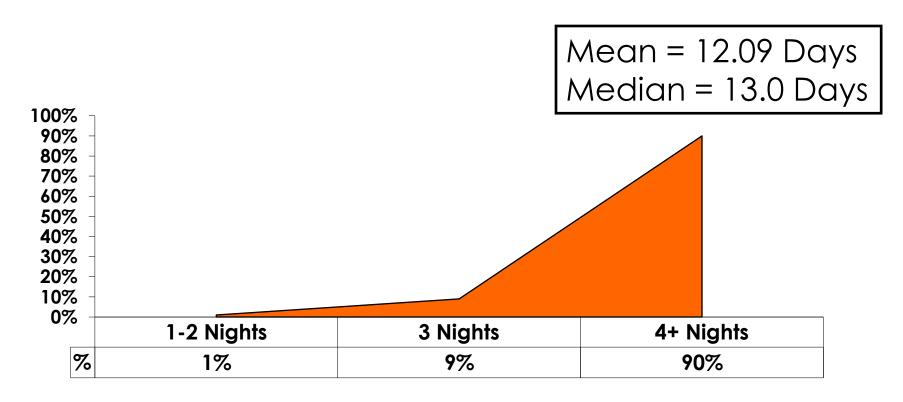
Average Number Overnight Trips

(2010-2015) (2 nights or more)



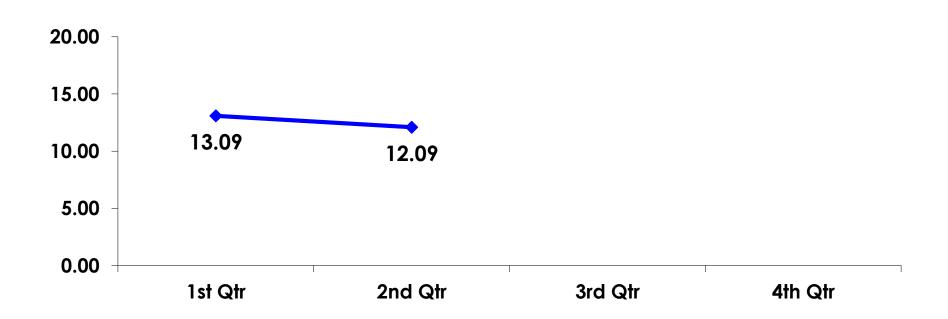


Length of Stay





AVG LENGTH OF STAY





Occupation by Income

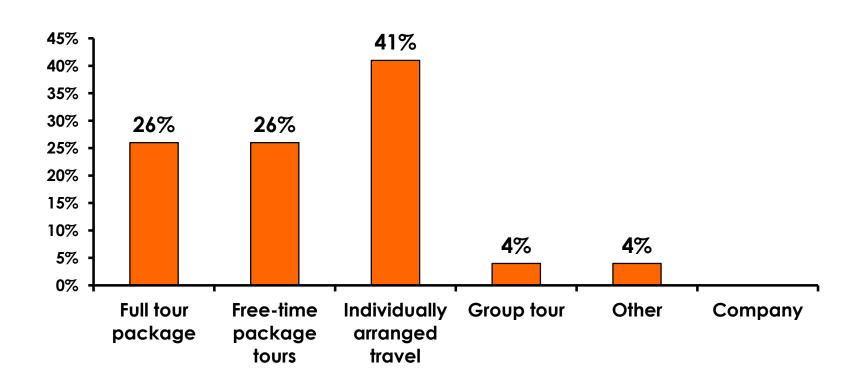
			TOTAL				Q2	7			
			-	<732,321	732,321- 1,098,481	1,098,482- 1,464,642	1,464,643- 1,830,803	1,830,803- 2,263,124	2,563,125- 3,661,606	3,661,607+	No Income
Q26	Self-employed		27%		4%	18%	47%	43%	63%		
	Professional/ Specialist		13%		25%	14%	14%	5%			
	Company: Exec		11%			4%	17%	29%	13%	100%	
	Retired		9%	100%	21%	4%			13%		
	Homemaker		8%			12%	6%	14%	13%		
	Company: Office/ Non- Mgr		7%		18%	8%	3%				
	Company: Manager		6%		4%	10%	3%	10%			
	Company: Engineer		5%		4%	10%	3%				
	Govt: Office/ Non-Mgr		4%		7%	8%					
	Other		3%		4%	4%	6%				
	Skilled worker		1%		7%						
	Teacher		1%		7%						
	Govt: Executive		1%			4%					
	Company: Salesperson		1%			4%					
	Govt: Manager		1%				3%				
	Total	Count	150	5	28	50	36	21	8	2	



SECTION 2 TRAVEL PLANNING



Travel Planning - Overall





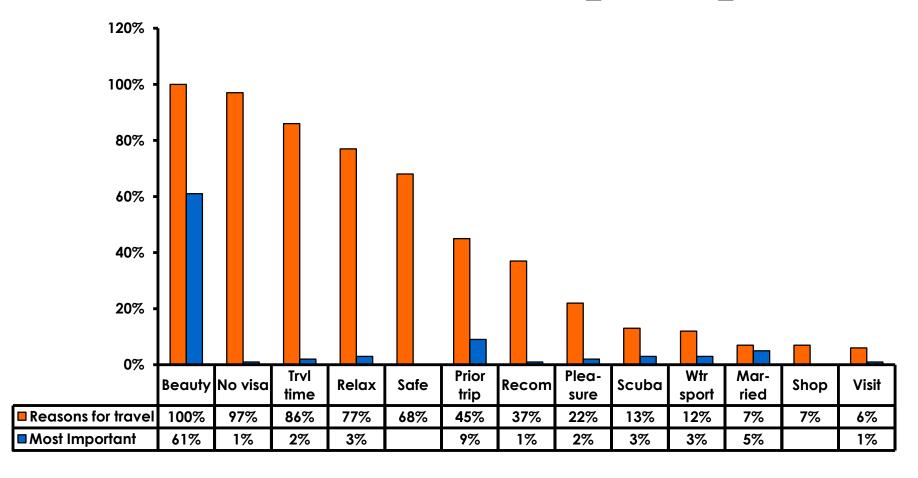
Accommodation by Income

Average length of stay: 12.09 days

			TOTAL				Q2	7			
			-	<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	Fiesta Resort Guam		21%	40%	14%	20%	28%	24%			
	Westin Resort Guam		17%		18%	8%	17%	33%	50%		
	Lotte Hotel Guam		11%		7%	14%	8%	10%	13%	100%	
	PIC Club		10%		18%	6%	17%	5%			
	Tumon Bay Capital Hotel		9%	20%	7%	14%	6%	5%			
	Outrigger Guam Resort		5%		7%	4%		5%	38%		
	Bayview Hotel		5%			10%	6%				
	Guam Reef & Olive Spa		4%		11%	2%	6%				
	Onward Beach Resort		3%	20%	7%		3%				
	Oceanview Hotel		3%	20%		4%		5%			
	Hotel Nikko Guam		3%			6%		5%			
	Hyatt Regency Guam		3%			2%	6%	5%			
	Hilton Guam Resort		2%			2%	3%	5%			
	Home stay/ friend/ relative		1%		4%	2%					
	Holiday Resort Guam		1%			2%	3%				
	Verona Resort & Spa		1%		4%						
	Aqua Suites		1%		4%						
	Condo		1%			2%					
	Total	Count	149	5	28	49	36	21	8	2	



Travel Motivation - Top Responses





Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches
- Positive prior experience
- Get married or attend a wedding 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		100%		100%	100%	100%	100%	100%		
	No Visa required		97%		100%	93%	97%	95%	99%		
	Short travel time		86%		92%	77%	92%	79%	93%		
	Relax		77%		78%	67%	89%	73%	81%		
	Safe		68%		71%	63%	70%	66%	70%		
	Previous trip		45%		41%	47%	49%	39%	51%		
	Recomm- friend/family/trvl agnt		37%		39%	33%	41%	47%	27%		
	Pleasure		22%		24%	27%	14%	27%	16%		
	Other		17%		27%	10%	14%	10%	23%		
	Scuba		13%		8%	22%	5%	19%	5%		
	Water sports		12%		6%	23%	3%	18%	5%		
	Married/ Attn wedding		7%		8%	2%	14%	6%	8%		
	Shopping		7%		6%	7%	8%	6%	7%		
	Visit friends/ Relatives		6%		6%	7%	5%	5%	7%		
	Price		1%		2%		3%	1%	1%		
	Company/ Business Trip		1%				3%		1%		
	Total	Count	150		51	60	37	77	73		



Motivation by Income

		TOTAL				Q2	7			
		-	<732,321	732,321- 1,098,481	1,098,482- 1,464,642	1,464,643- 1,830,803	1,830,803- 2,263,124	2,563,125- 3,661,606	3,661,607+	No Income
Q5A	Natural beauty	100%	100%	100%	100%	100%	100%	100%	100%	
	No Visa required	97%	100%	100%	96%	94%	95%	100%	100%	
	Short travel time	86%	80%	96%	90%	78%	76%	88%	100%	
	Relax	77%	60%	89%	80%	75%	67%	75%		
	Safe	68%	60%	50%	68%	75%	76%	75%	100%	
	Previous trip	45%	60%	39%	38%	56%	43%	50%	50%	
	Recomm- friend/family/trvl agnt	37%	20%	50%	32%	42%	29%	38%	50%	
	Pleasure	22%		21%	22%	22%	33%		50%	
	Other	17%	20%	7%	14%	22%	24%	25%		
	Scuba	13%			14%	19%	24%			
	Water sports	12%		7%	12%	14%	14%		100%	
	Married/ Attn wedding	7%		4%	6%	6%	10%	25%	50%	
	Shopping	7%	20%	7%	6%	8%		13%		
	Visit friends/ Relatives	6%		7%	6%	6%	10%			
	Price	1%			4%					
	Company/ Business Trip	1%			2%					
	Total Co.	unt 150	5	28	50	36	21	8	2	



SECTION 3 EXPENDITURES



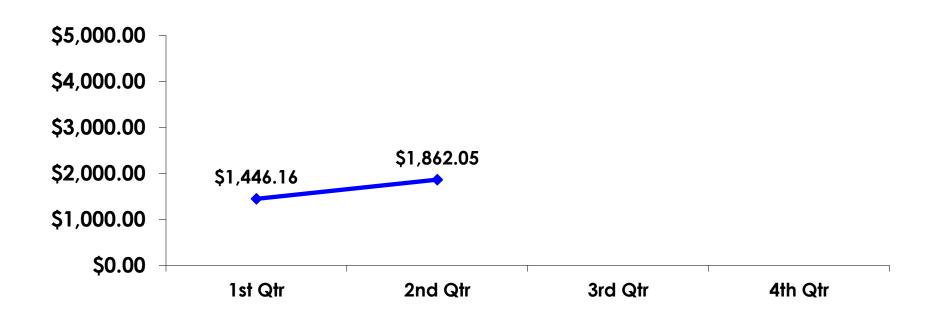
Prepaid Expenditures

Ruble 62.97 /US\$1

- \$3,957.90 = overall mean average prepaid expense (for entire travel party size) by respondent
- $\$0 = \min \text{minimum}$ (lowest amount recorded for the entire sample)
- \$10,934 = maximum (highest amount recorded for the entire sample)
- \$1,862.05 = overall mean average <u>per person</u> prepaid expenditures



PREPAID EXPENDITURES Per Person



YTD=\$1,654.10



Breakdown of Prepaid Expenditures Rub 62.97=\$1

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

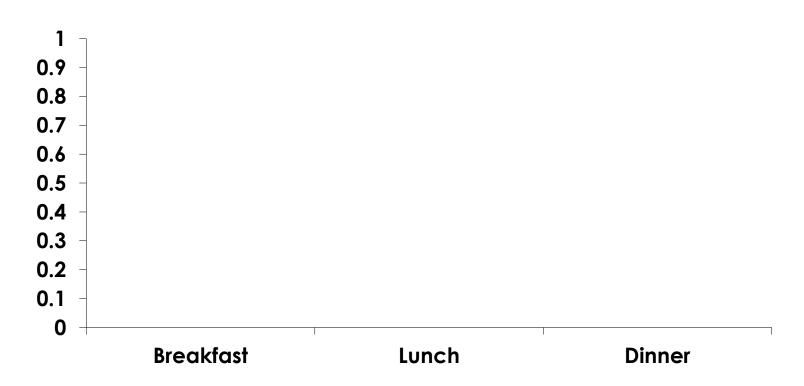
	MEAN \$
Air & Accommodation package only	\$3,603.54
Air & Accommodation w/ daily meal package	\$5,386.05
Air only	\$1,790.98
Accommodation only	\$391.34
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation – Russia	\$-
Ground transportation – Guam	\$-
Optional tours/ activities	\$-
Other expenses	\$-
Total Prepaid	\$3,957.90



PREPAID MEAL BREAKDOWN

Air/Accommodations with Daily Meal Pkg.

n= **X** (None recorded)



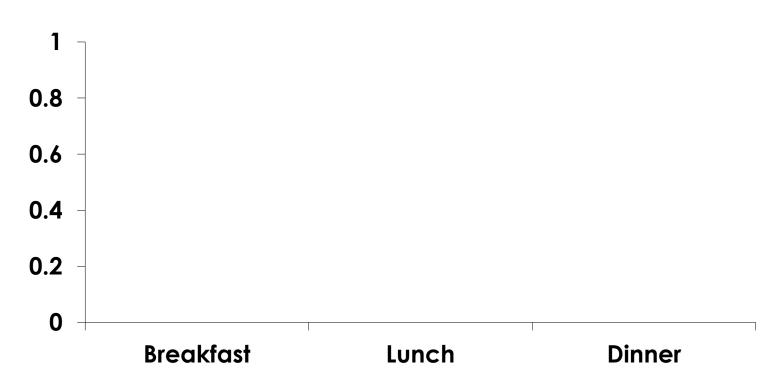
Mean=\$4,813.95 per travel party



PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.





Mean=\$xxx.xx per travel party



PREPAID GROUND TRANSPORTATION

n=x



Mean=\$xxx per travel party

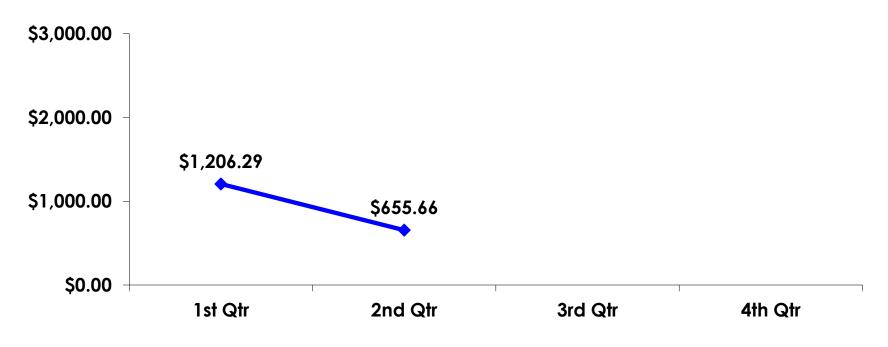


On-Island Expenditures

- \$1,238.06 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,660 = Maximum (highest amount recorded for the entire sample)
- \$655.66 = overall mean average <u>per person</u> onisland expenditure



ON-ISLAND EXPENDITURES Per Person



$$YTD = $930.97$$



Total On-Island Expenditure by Gender & Age

		TOTAL	GEN	DER	GENDER								
						Ma	ile		Female				
					AGE				AGE				
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+	
ONISLE	Mean	\$655.66	\$608.69	\$705.20		\$628.73	\$608.40	\$587.33		\$688.08	\$603.74	\$815.60	
	Median	\$587	\$550	\$600		\$470	\$600	\$538		\$595	\$535	\$800	
	Minimum	\$0	\$157	\$0		\$250	\$275	\$157		\$267	\$0	\$0	
	Maximum	\$2,500	\$1,800	\$2,500		\$1,800	\$1,110	\$1,075		\$1,700	\$1,250	\$2,500	



On-Island Expenditure Categories by Gender & Age

		TOTAL	GEN	DER	AGE					
		-	Male	Female	18-24	25-34	35-49	50+		
F&B HOTEL	Mean	\$61.60	\$76.49	\$45.89		\$57.75	\$71.25	\$48.65		
	Median	\$0	\$0	\$0		\$0	\$0	\$0		
F&B FF/STORE	Mean	\$118.57	\$122.47	\$114.45		\$136.27	\$116.42	\$100.00		
	Median	\$100	\$100	\$100		\$150	\$100	\$90		
F&B RESTRNT	Mean	\$242.13	\$274.55	\$207.95		\$198.63	\$265.33	\$268.11		
	Median	\$230	\$250	\$200		\$200	\$250	\$250		
OPT TOUR	Mean	\$194.19	\$227.18	\$159.38		\$189.90	\$228.83	\$145.49		
	Median	\$180	\$200	\$125		\$200	\$200	\$150		
GIFT- SELF	Mean	\$252.45	\$258.42	\$246.16		\$298.24	\$217.00	\$249.68		
	Median	\$180	\$150	\$200		\$200	\$200	\$150		
GIFT- OTHER	Mean	\$202.23	\$209.55	\$194.52		\$195.00	\$186.67	\$237.57		
	Median	\$150	\$200	\$150		\$150	\$200	\$150		
TRANS	Mean	\$129.88	\$175.30	\$81.97		\$134.61	\$128.45	\$129.46		
	Median	\$60	\$160	\$50		\$70	\$60	\$60		
OTHER	Mean	\$38.61	\$27.65	\$50.16		\$40.04	\$30.78	\$45.19		
	Median	\$0	\$0	\$50		\$0	\$0	\$40		
TOTAL	Mean	\$1,238.06	\$1,368.35	\$1,100.63		\$1,249.45	\$1,249.90	\$1,210.62		
	Median	\$1,085	\$1,200	\$1,000		\$1,100	\$1,100	\$1,000		

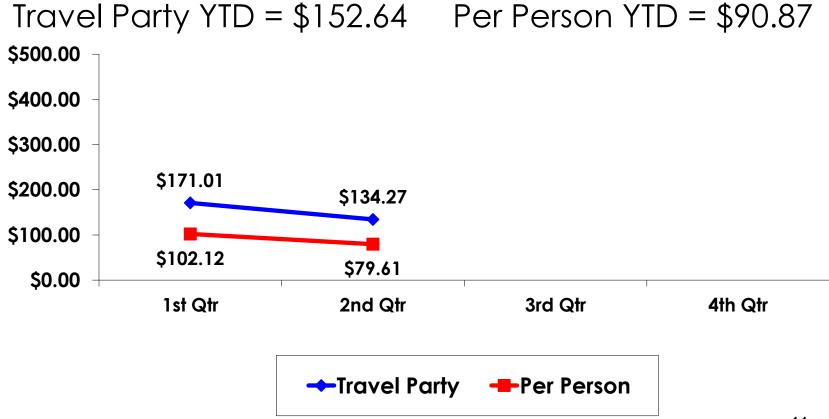


On-Island Expenditures First Timers & Repeaters

		TOTAL	TRIPST	O GUAM
		1	1st	Repeat
F&B HOTEL	Mean	\$61.60	\$62.85	\$60.21
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$118.57	\$126.08	\$110.21
	Median	\$100	\$100	\$100
F&B RESTRNT	Mean	\$242.13	\$215.00	\$272.32
	Median	\$230	\$200	\$250
OPT TOUR	OPTTOUR Mean		\$210.16	\$176.41
	Median	\$180	\$200	\$125
GIFT- SELF	Mean	\$252.45	\$226.30	\$281.55
	Median	\$180	\$200	\$150
GIFT- OTHER	Mean	\$202.23	\$190.38	\$215.42
	Median	\$150	\$200	\$150
TRANS	Mean	\$129.88	\$134.57	\$124.66
	Median	\$60	\$60	\$60
OTHER	Mean	\$38.61	\$28.34	\$50.03
	Median	\$0	\$0	\$25
TOTAL	Mean	\$1,238.06	\$1,193.18	\$1,288.00
	Median	\$1,085	\$1,150	\$1,000



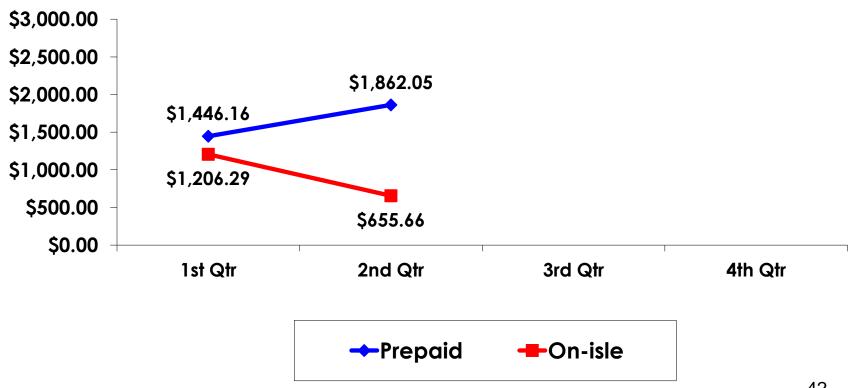
ON-ISLE EXPENDITURES – Per Day





PREPAID/ ON-ISLE **EXPENDITURES – Per Person**

Prepaid YTD = \$1,654.10 On-Isle YTD = \$930.97



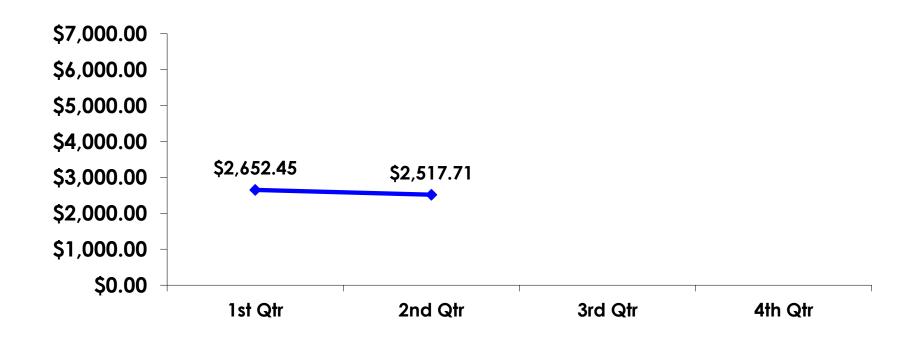


Total Expenditures Per Person (Prepaid & On-Island)

- \$2,517.71 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,764 = Maximum (highest amount recorded for the entire sample)



TOTAL EXPENDITURES Per Person



YTD=\$2,585.08



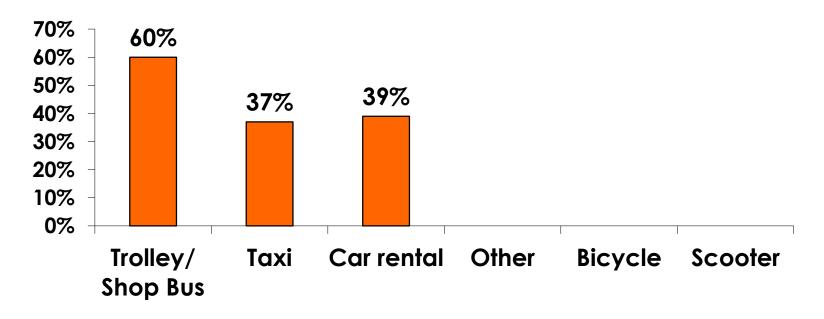
Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$61.60
Food & beverage in fast food restaurant/convenience store	\$118.57
Food & beverage at restaurants or drinking establishments outside a hotel	\$242.13
Optional tours and activities	\$194.19
Gifts/souvenirs for yourself/companions	\$252.45
Gifts/ souvenirs for friends/family at home	\$202.23
Local transportation	\$129.88
Other expenses not covered	\$38.61
Average Total	\$1,238.06



Local Transportation

n=137



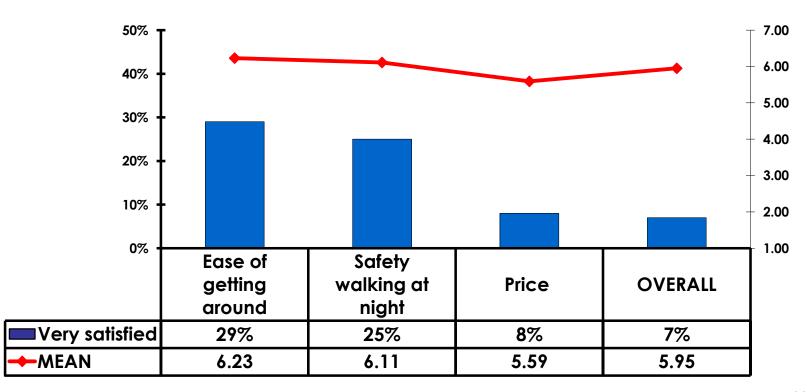
Mean=\$129.88 per travel party



SECTION 4 VISITOR SATISFACTION

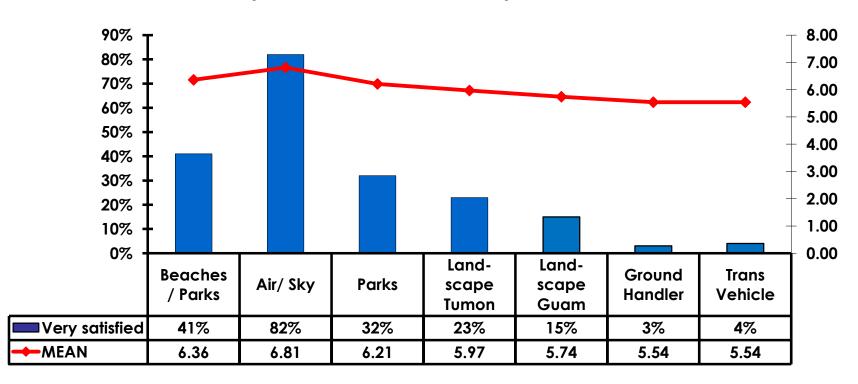


Satisfaction Scores Overall



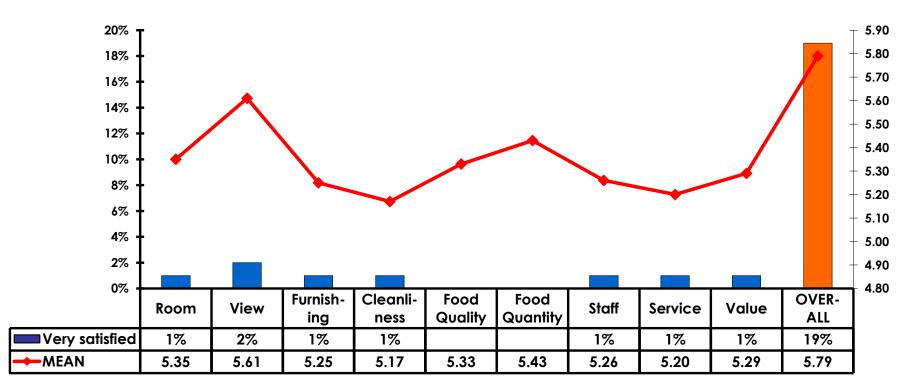


Satisfaction Quality/ Cleanliness





Quality of Accommodations



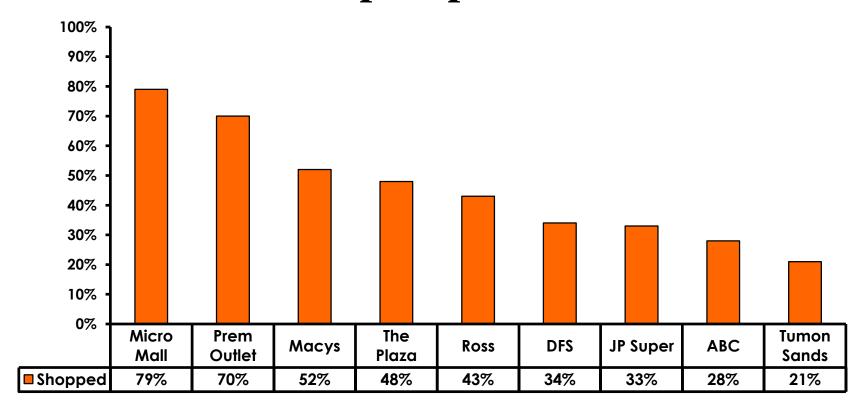


Quality of Dining Experience





Visits to Shopping Centers/Malls on Guam Top responses





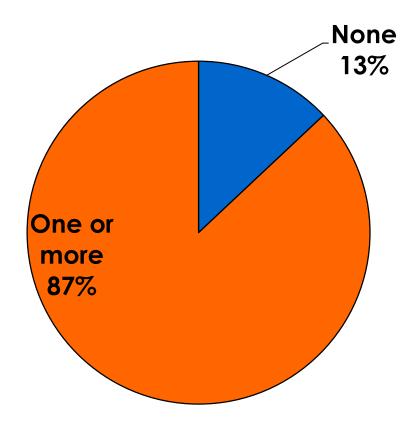
Satisfaction with Shopping

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 46%	Score of 6 to 7 = 46%
Score of 4 to 5 = 52%	Score of 4 to 5 = 51%
Score 1 to 3 = 2 %	Score 1 to 3 = 3 %
MEAN = 5.33	MEAN = 5.29



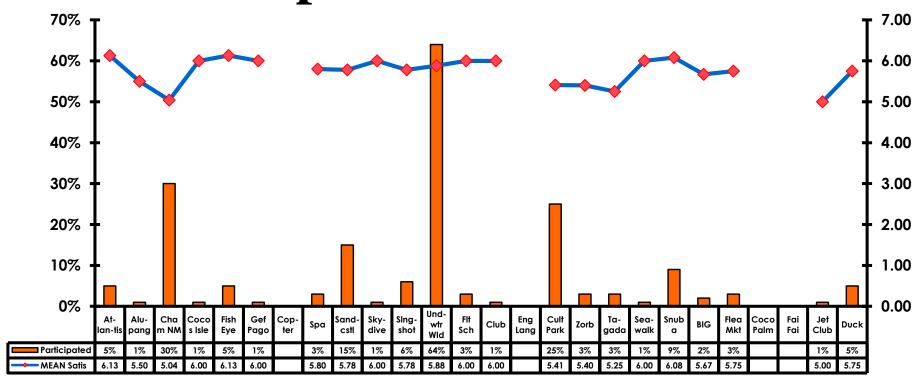
Optional Tour Participation

• Average number of tours participated in is 2.57





Optional Tours Participation & Satisfaction





Day Tours Satisfaction

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 75 %	Score of 6 to 7 = 40%
Score of 4 to 5 = 25 %	Score of 4 to 5 = 50%
Score 1 to 3 = -%	Score 1 to 3 = 8%
MEAN = 5.92	MEAN = 5.02

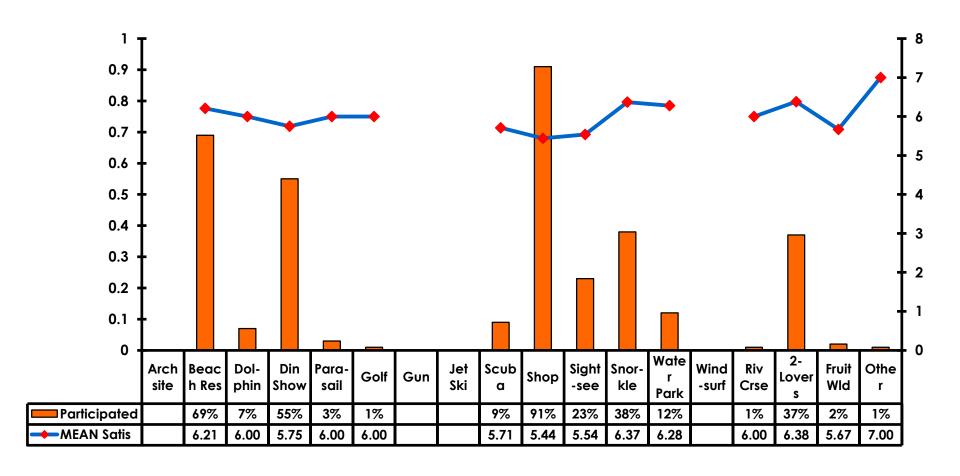


Night Tours Satisfaction

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 36%	Score of 6 to 7 = 24%
Score of 4 to 5 = 64%	Score of 4 to 5 = 62 %
Score 1 to 3 = -%	Score 1 to 3 = 14%
MEAN = 5.23	MEAN = 4.52

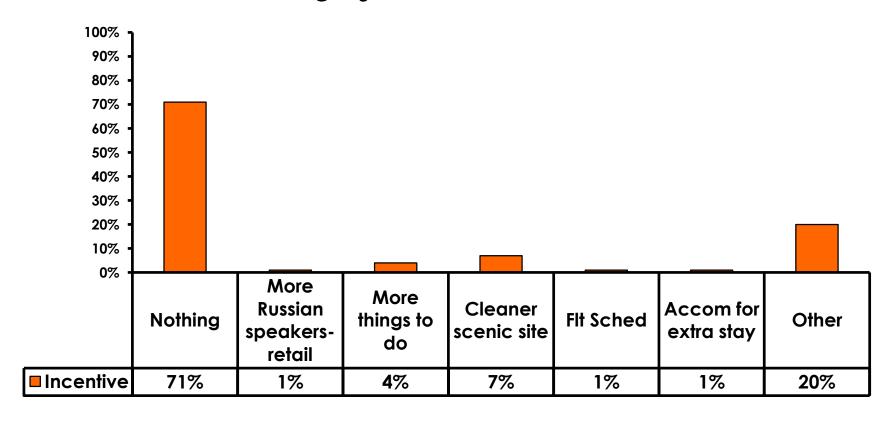


Satisfaction with Other Activities



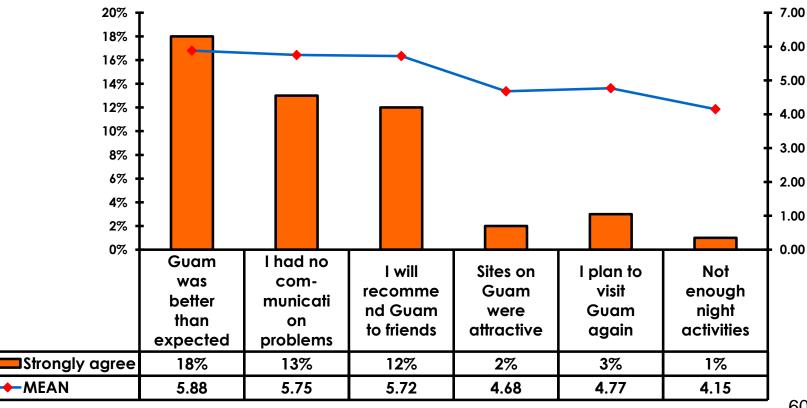


What would it take to make Guam more enjoyable for families?





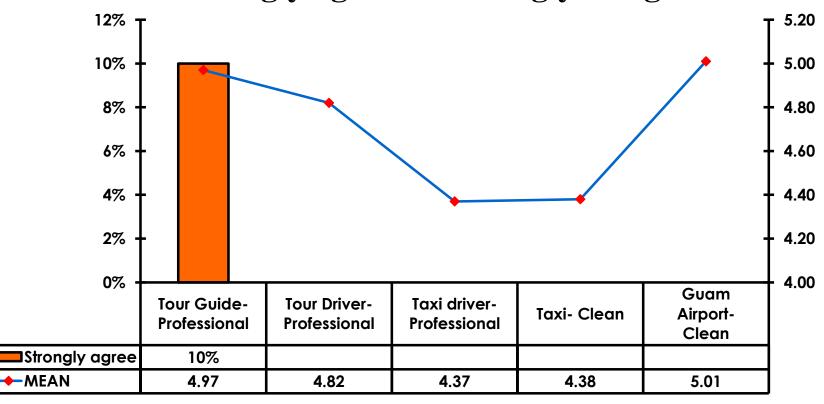
On-Island Perceptions





Transportation

7pt Rating Scale 7=Strongly agree/ 1=Strongly disagree

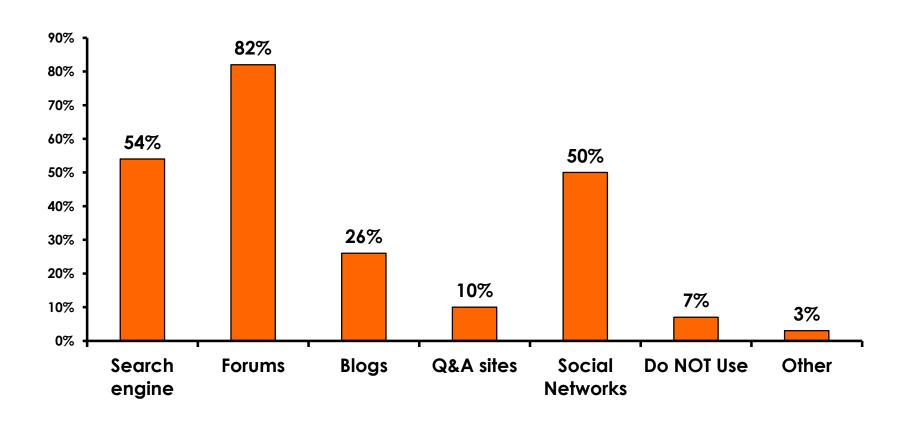




SECTION 5 PROMOTIONS

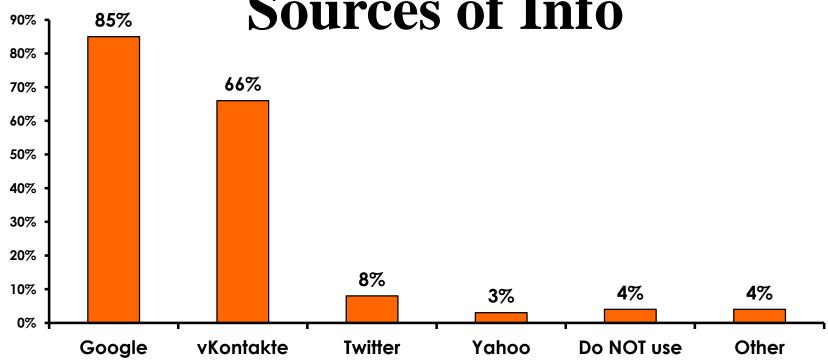


Internet- Guam Sources of Info



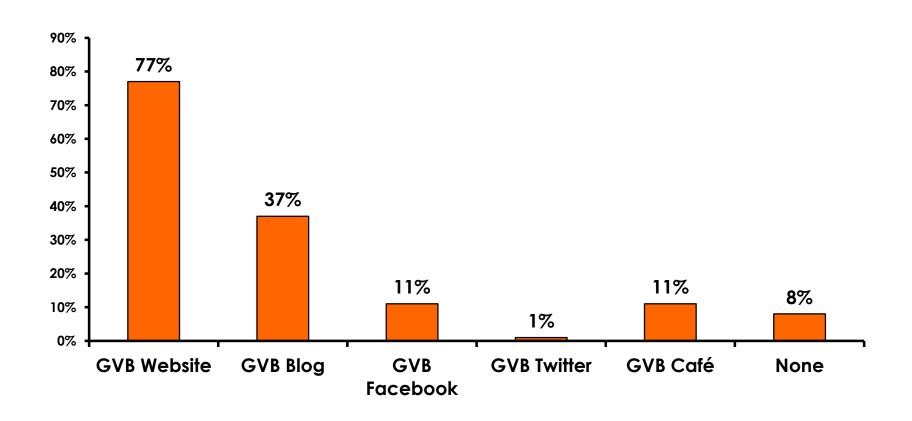


Internet- Things To Do Sources of Info



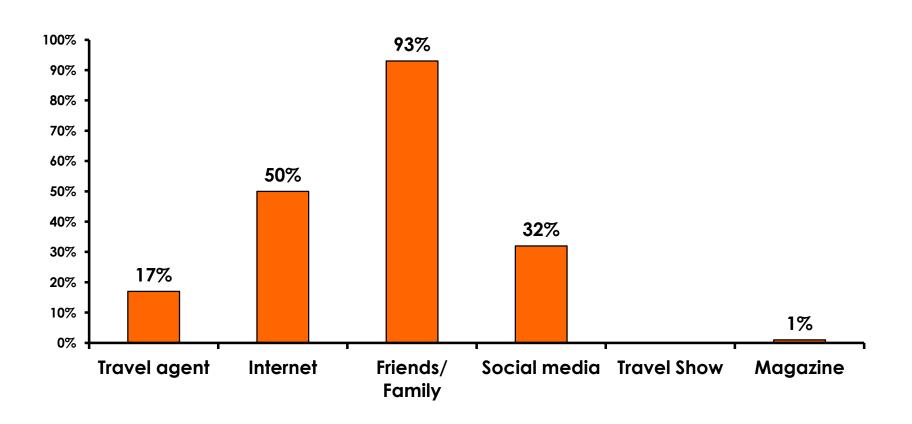


Internet- GVB Sources



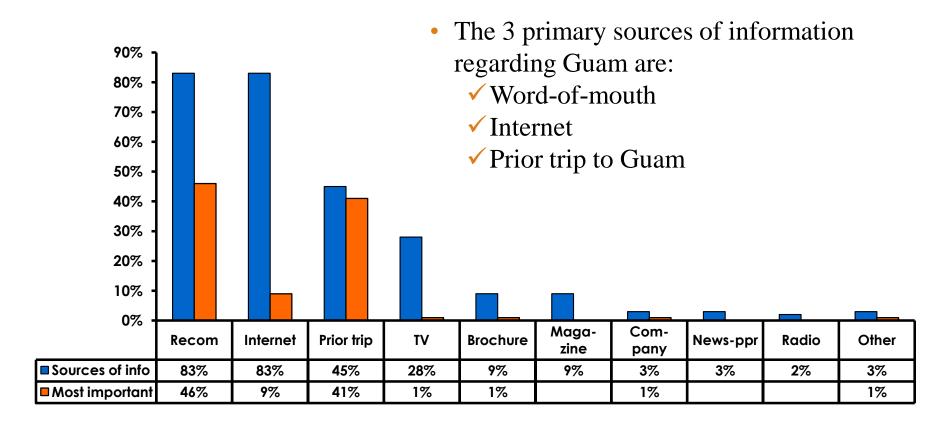


Travel Motivation-Info Sources



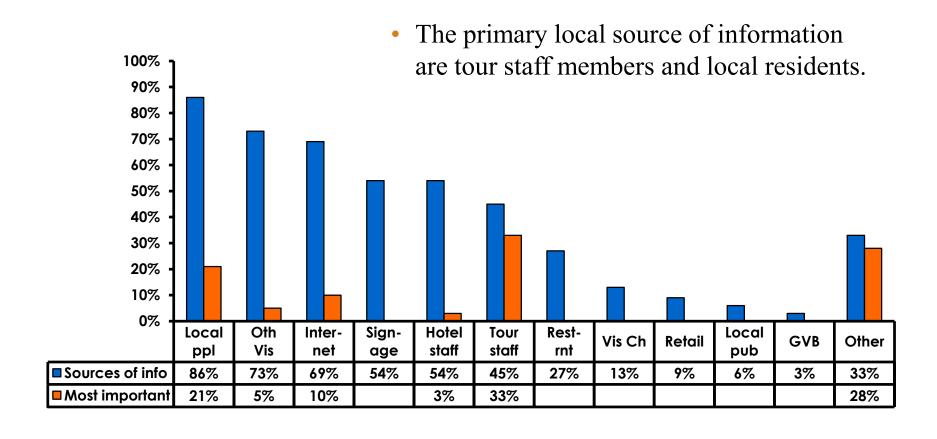


Sources of Information Pre-arrival





Sources of Information Post-arrival

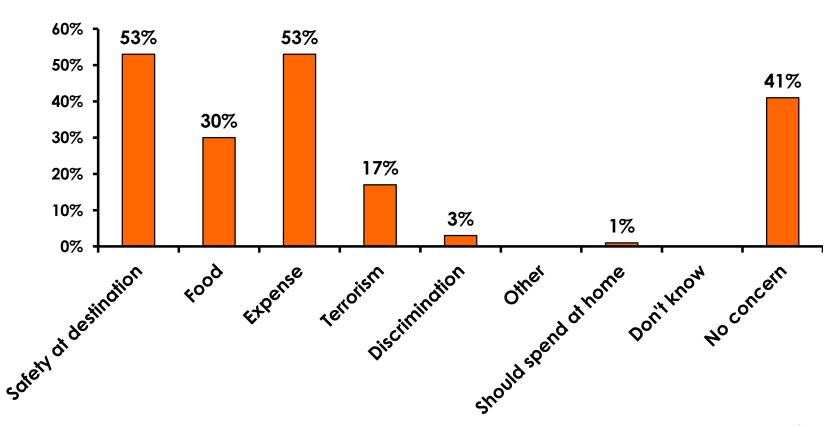




SECTION 6 OTHER ISSUES



Concerns about travel outside of Russia - Overall



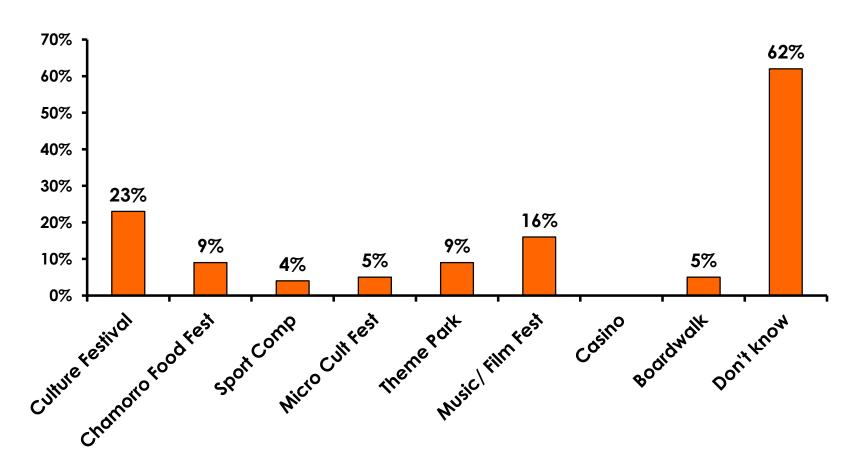


Concerns about travel outside of Russia - By Age & Income

		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	Expense	53%		49%	60%	49%	40%	50%	58%	64%	43%	38%		
	Safety	53%		49%	57%	54%	40%	54%	62%	58%	38%	38%		
	No concerns	41%		45%	37%	43%	60%	36%	34%	36%	57%	63%	100%	
	Food	30%		31%	28%	30%	20%	18%	30%	33%	43%	38%		
	Terrorism	17%		12%	20%	22%		25%	10%	19%	24%	25%		
	Discrimination against Russians	3%			3%	5%			8%					
	Should spend at home	1%			2%				2%					
	Total Coun	150		51	60	37	5	28	50	36	21	8	2	

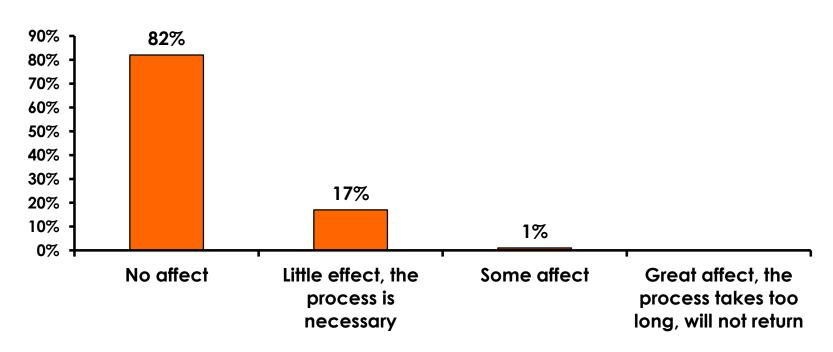


Activities/ Attractions- Appeal





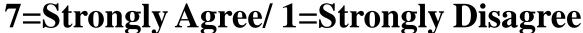
Security Screening/Immigration Process at Guam International Airport

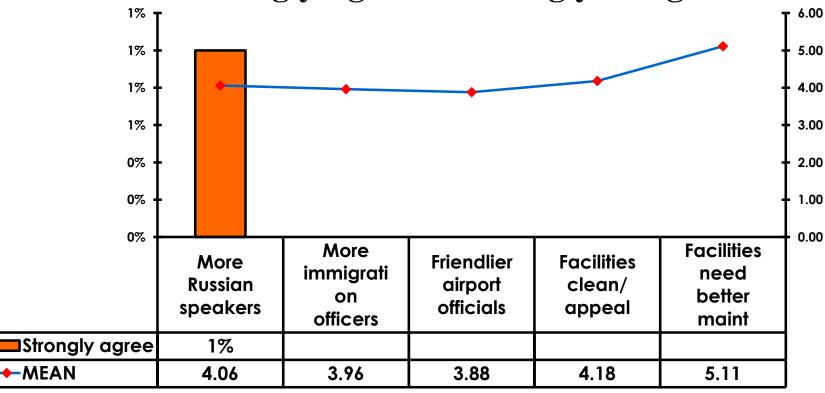




Airport Arrival Experience

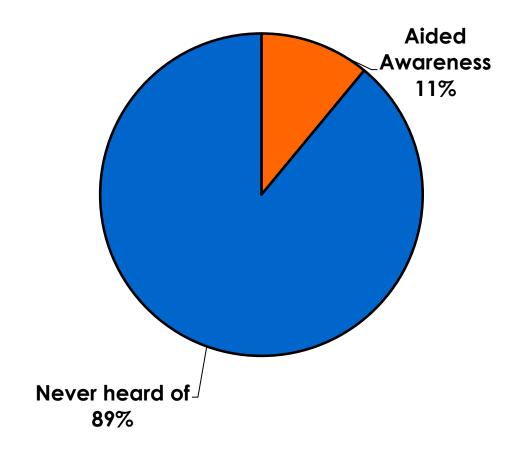
7pt Rating Scale







Shop Guam Festival





Shop Guam Festival - Impact n=16

