



# **GUAM VISITORS BUREAU**

## **Russian Visitor Tracker Exit Profile**

### **FY2015**

#### **4<sup>th</sup> QTR. (JUL-SEPT'15)**



**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.

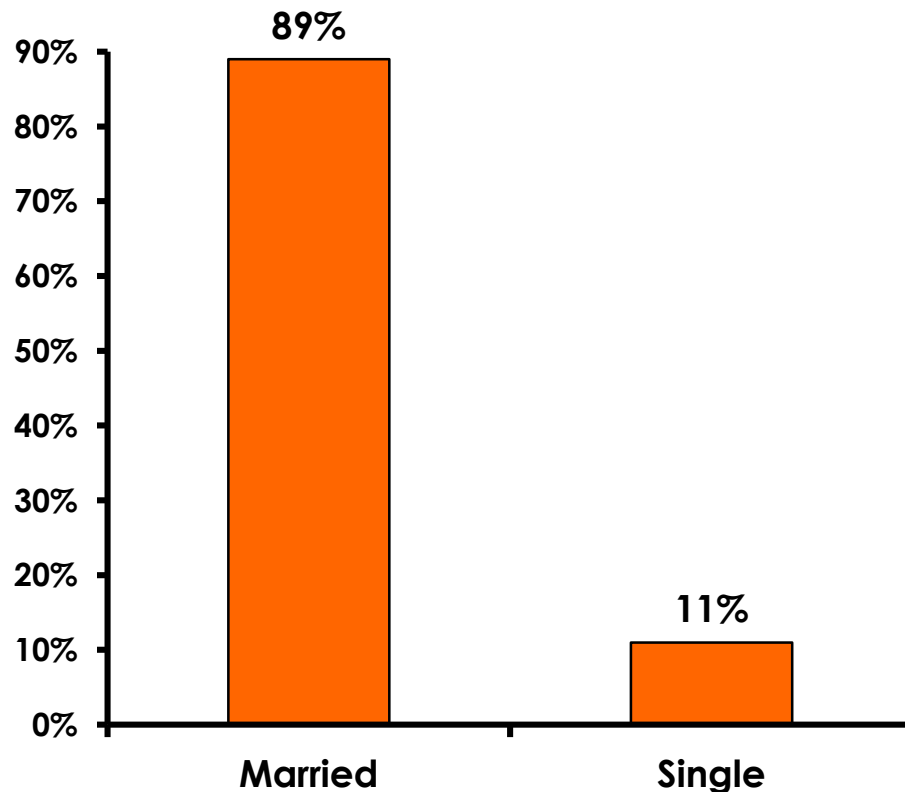
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# OBJECTIVES

- 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.

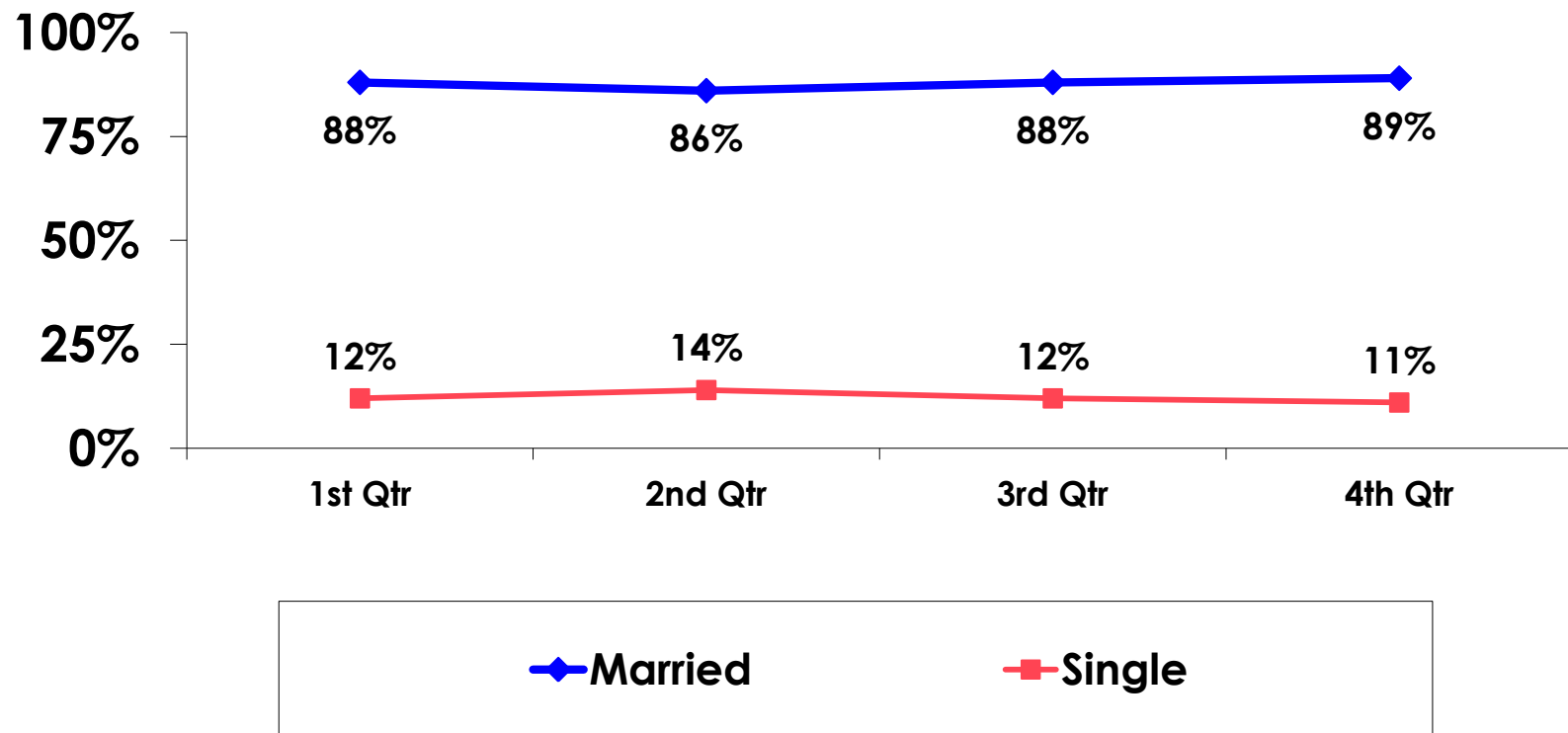
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

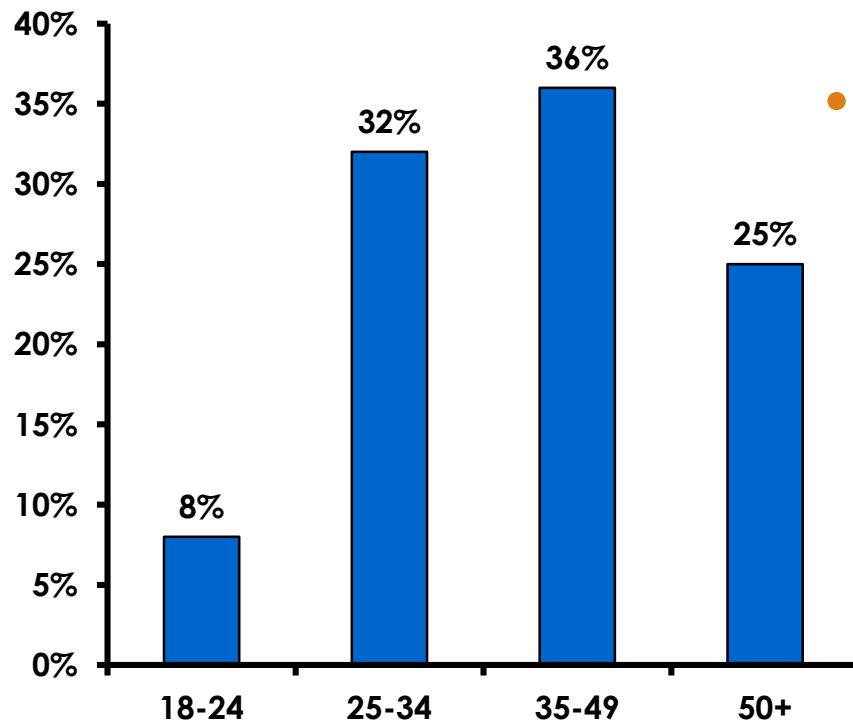


- Majority of Russian visitors are married.

# MARITAL STATUS

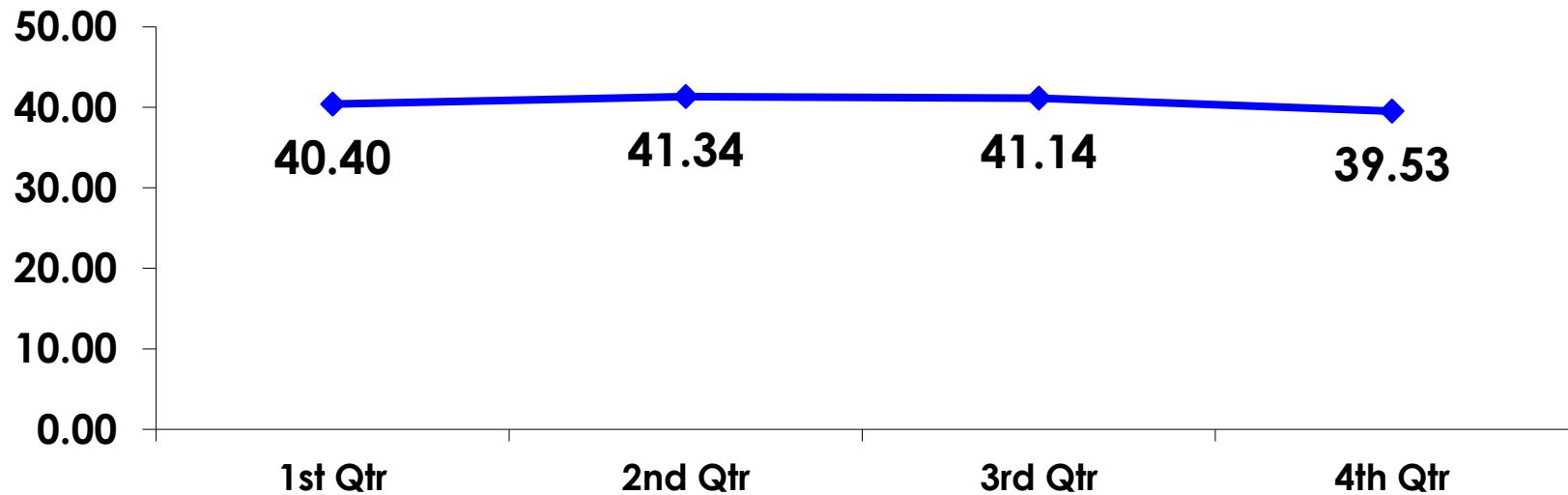


# Age - Overall



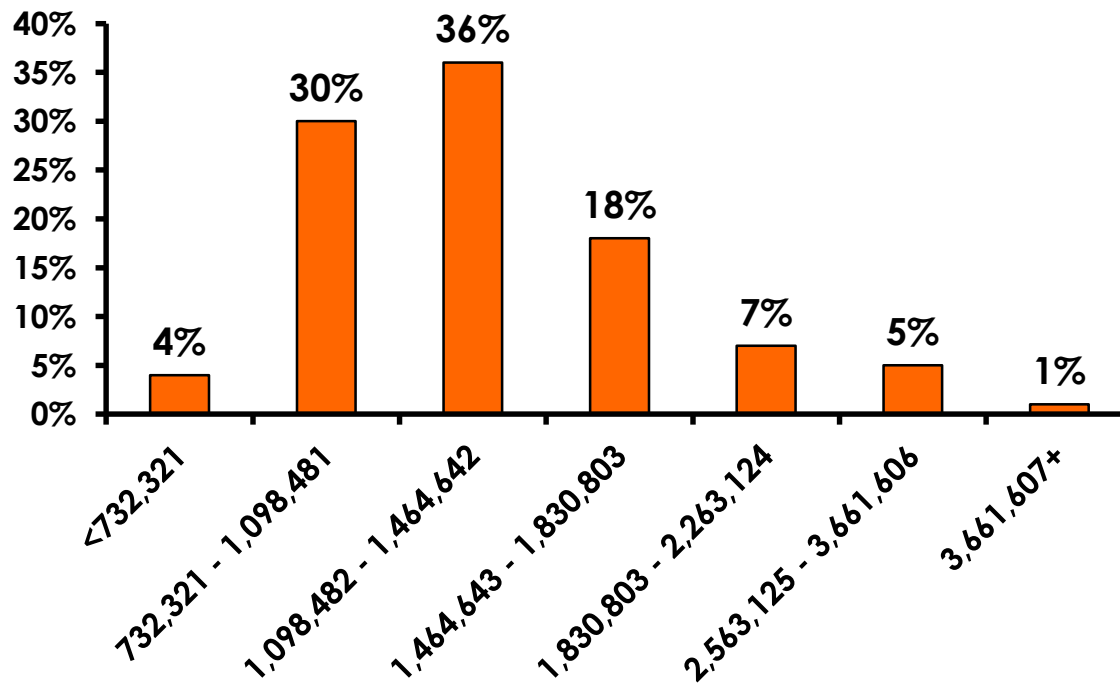
- The average age of the respondents is 39.53 years of age.

# AVERAGE - AGE



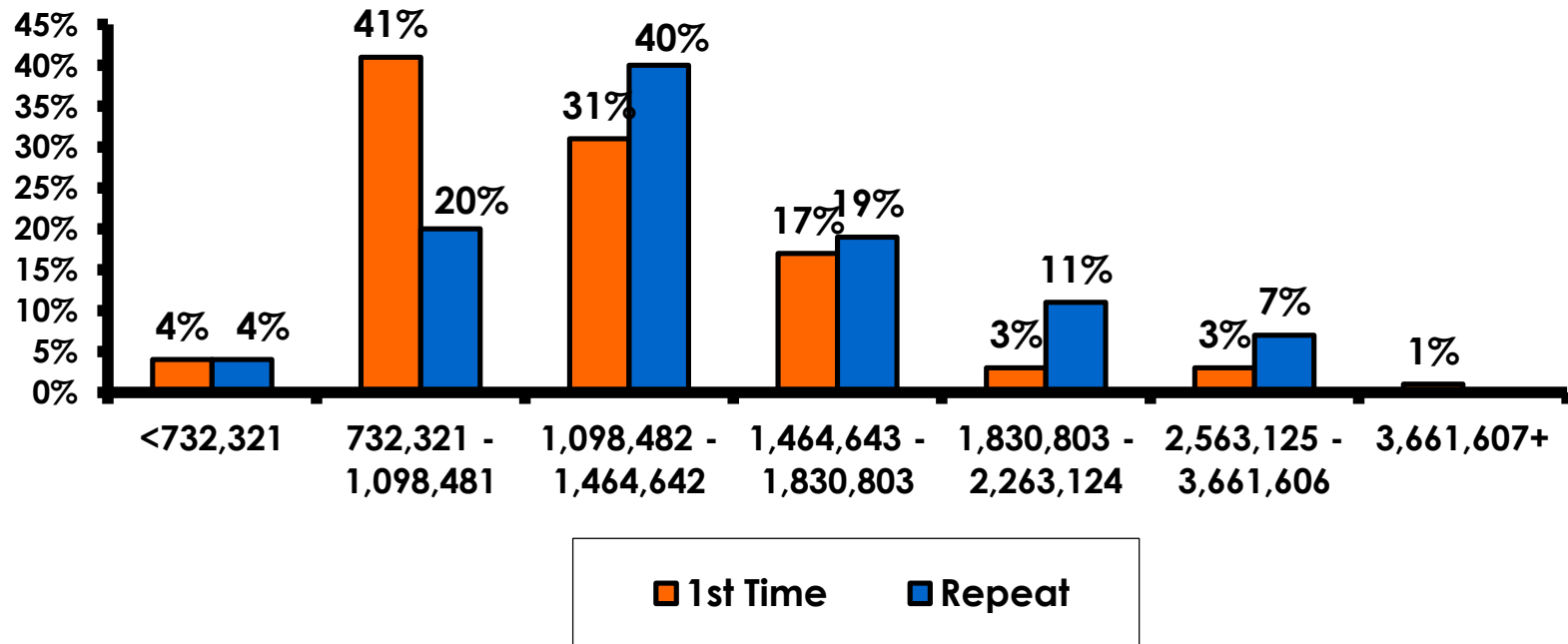


# Personal Income



- Ruble  
62.59=\$1

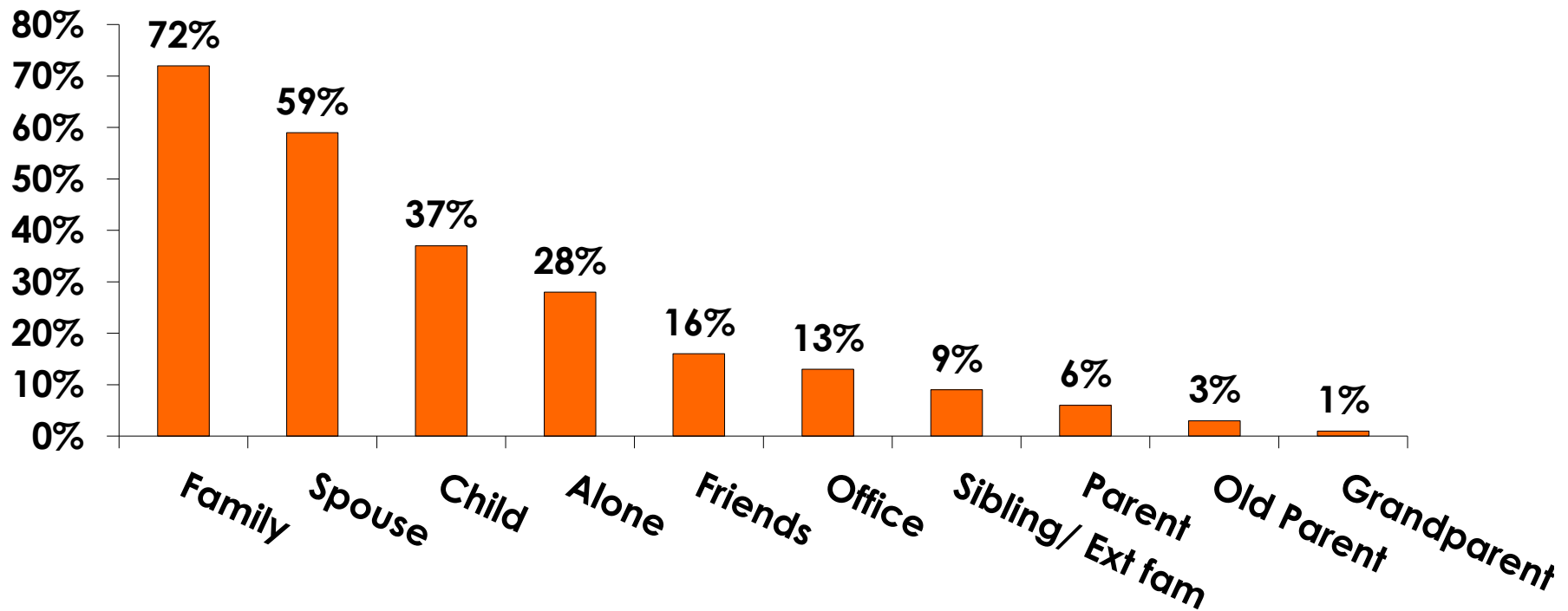
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q27	<732,321	Count	6	2	4	1			4
		Column N %	4%	3%	6%	13%			11%
	732,321-1,098,481	Count	44	15	29	3	16	16	9
		Column N %	30%	20%	41%	38%	36%	30%	25%
	1,098,482-1,464,642	Count	52	32	20	2	17	17	13
		Column N %	36%	42%	29%	25%	38%	32%	36%
	1,464,643-1,830,803	Count	26	16	10		10	10	6
		Column N %	18%	21%	14%		22%	19%	17%
	1,830,803-2,263,124	Count	10	8	2	1	1	5	3
		Column N %	7%	11%	3%	13%	2%	9%	8%
	2,563,125-3,661,606	Count	7	2	5	1	1	4	1
		Column N %	5%	3%	7%	13%	2%	8%	3%
	3,661,607+	Count	1	1				1	
		Column N %	1%	1%				2%	
Total		Count	146	76	70	8	45	53	36

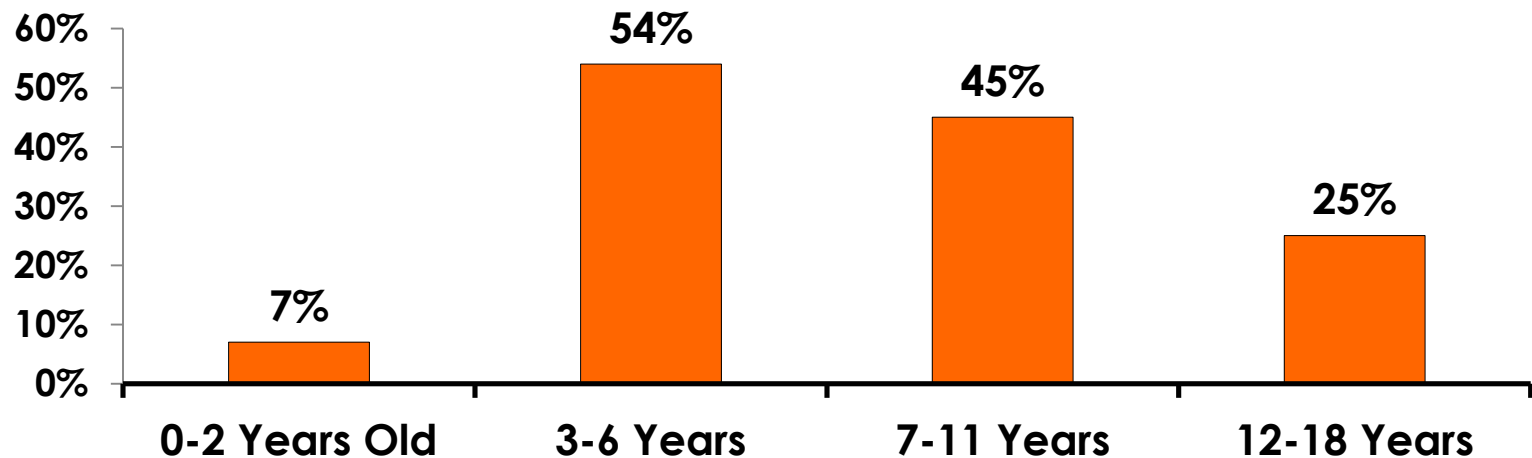
# Travel Companions



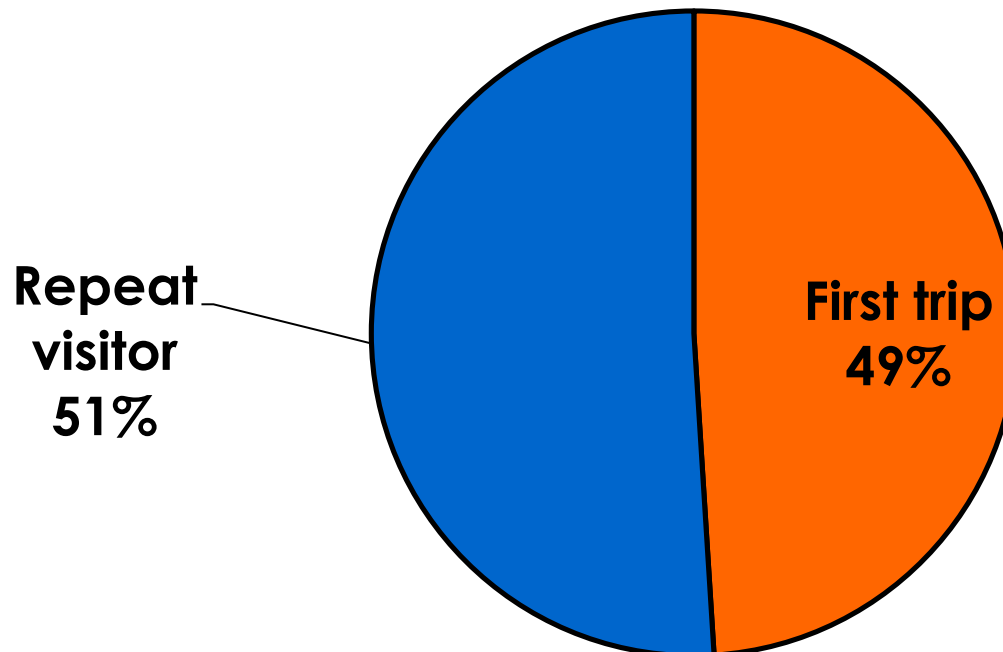
# Number of Children Travel Party

N=55 total respondents traveling with children.

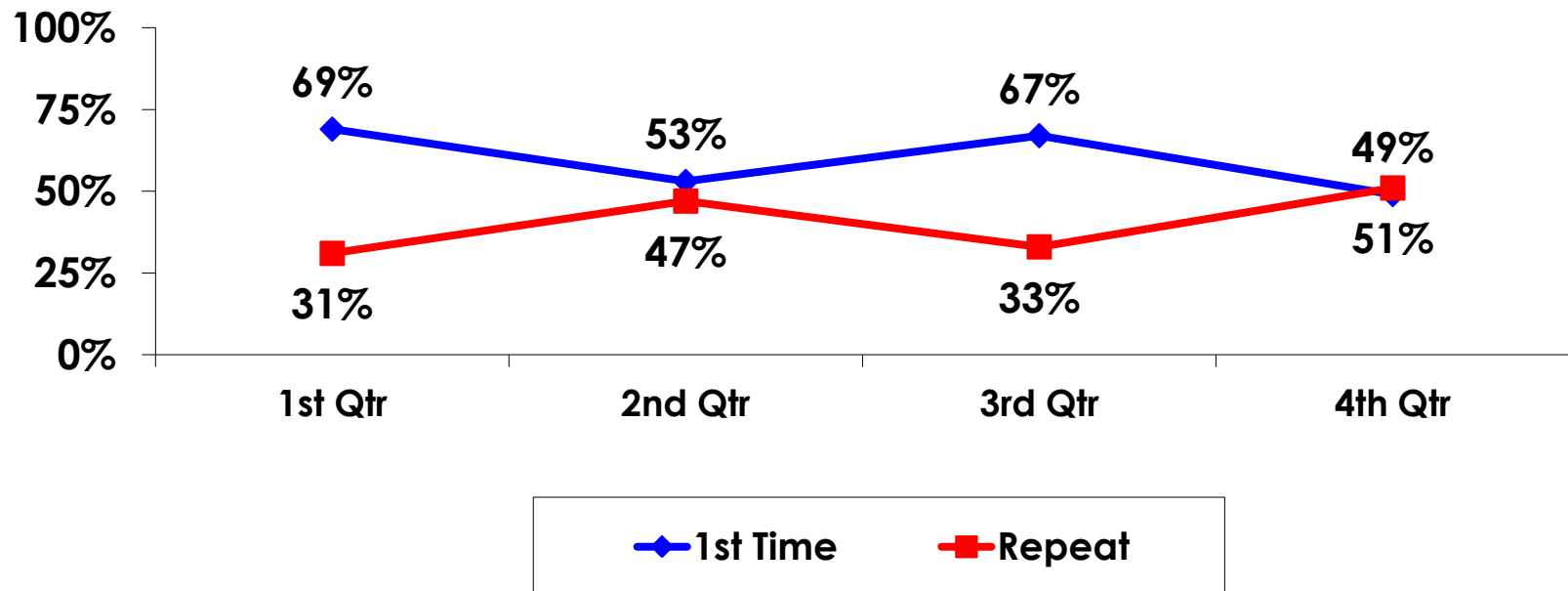
(Of those N=55 respondents, there is a total of 76 children 18 years or younger)



# Prior Trips to Guam



# PRIOR TRIPS TO GUAM



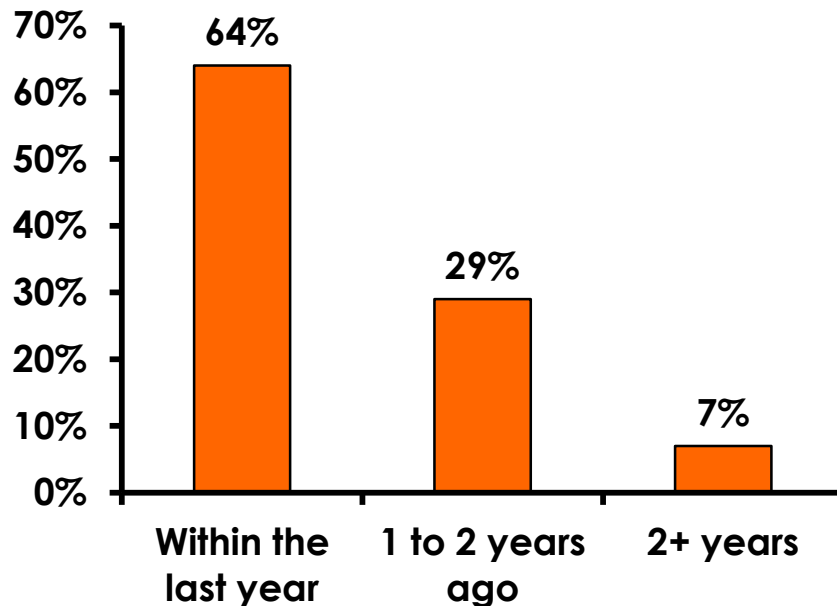
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	78	41	37	
		Column N %	52%	56%	48%	
	Female	Count	72	32	40	
		Column N %	48%	44%	52%	
	Total	Count	150	73	77	
AGE	18-24	Count	11	7	4	
		Column N %	8%	10%	5%	
	25-34	Count	46	21	25	
		Column N %	32%	29%	34%	
	35-49	Count	53	28	25	
		Column N %	36%	39%	34%	
	50+	Count	36	16	20	
		Column N %	25%	22%	27%	
		Total	Count	146	72	74



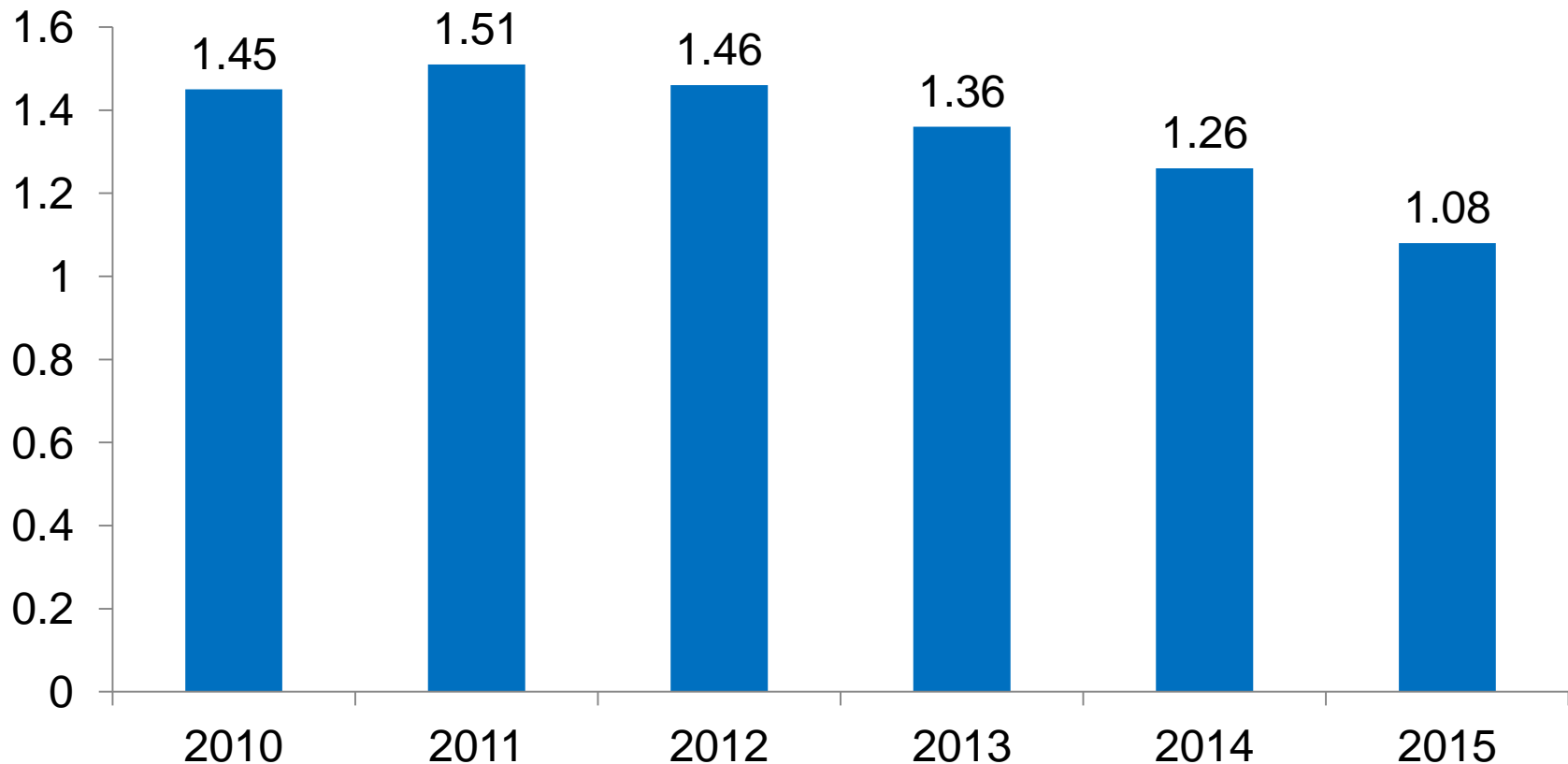
# Repeat Visitors Last Trip

n = 75



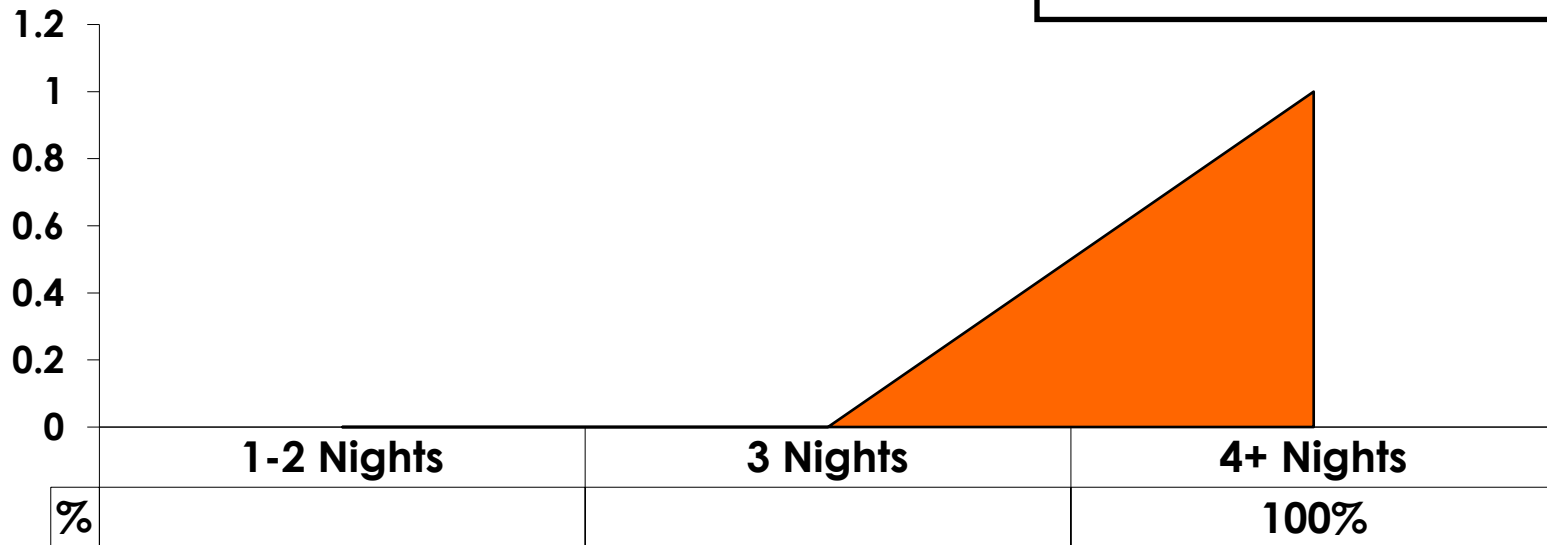
- The average repeat visitor has been to Guam 1.55 times.
- A majority of the repeat visitors have been to Guam within the last year.

# Average Number Overnight Trips (2010-2015) (2 nights or more)

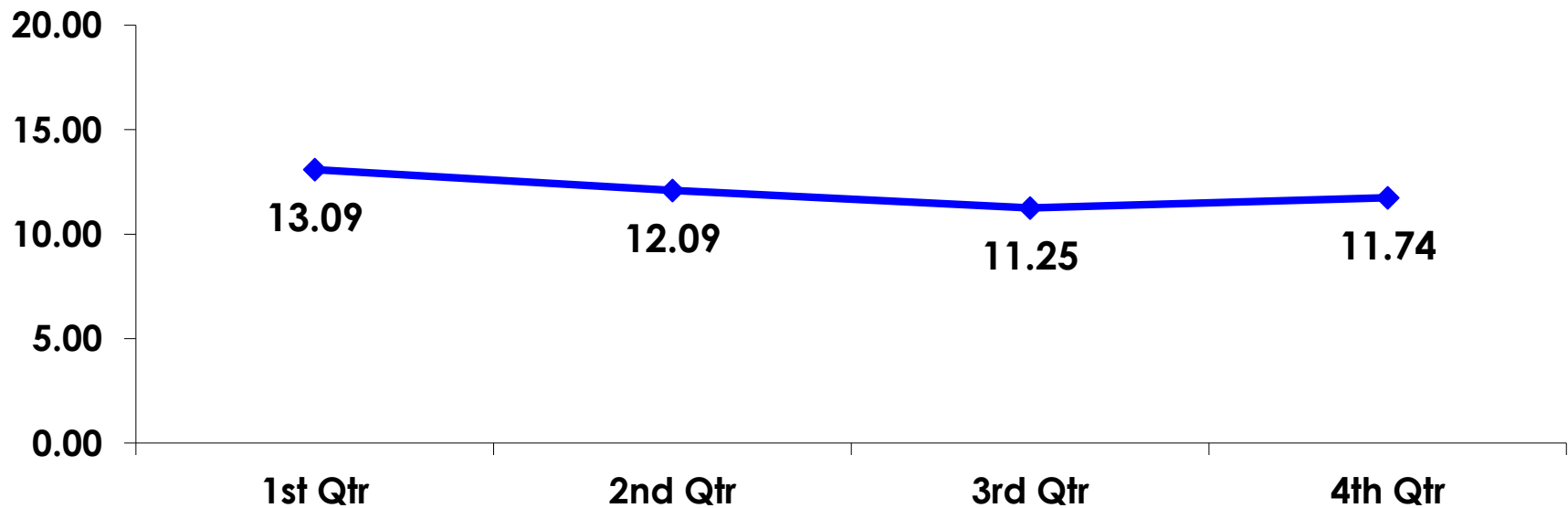


# Length of Stay

Mean = 11.74 Days  
Median = 12.0 Days



# AVG LENGTH OF STAY

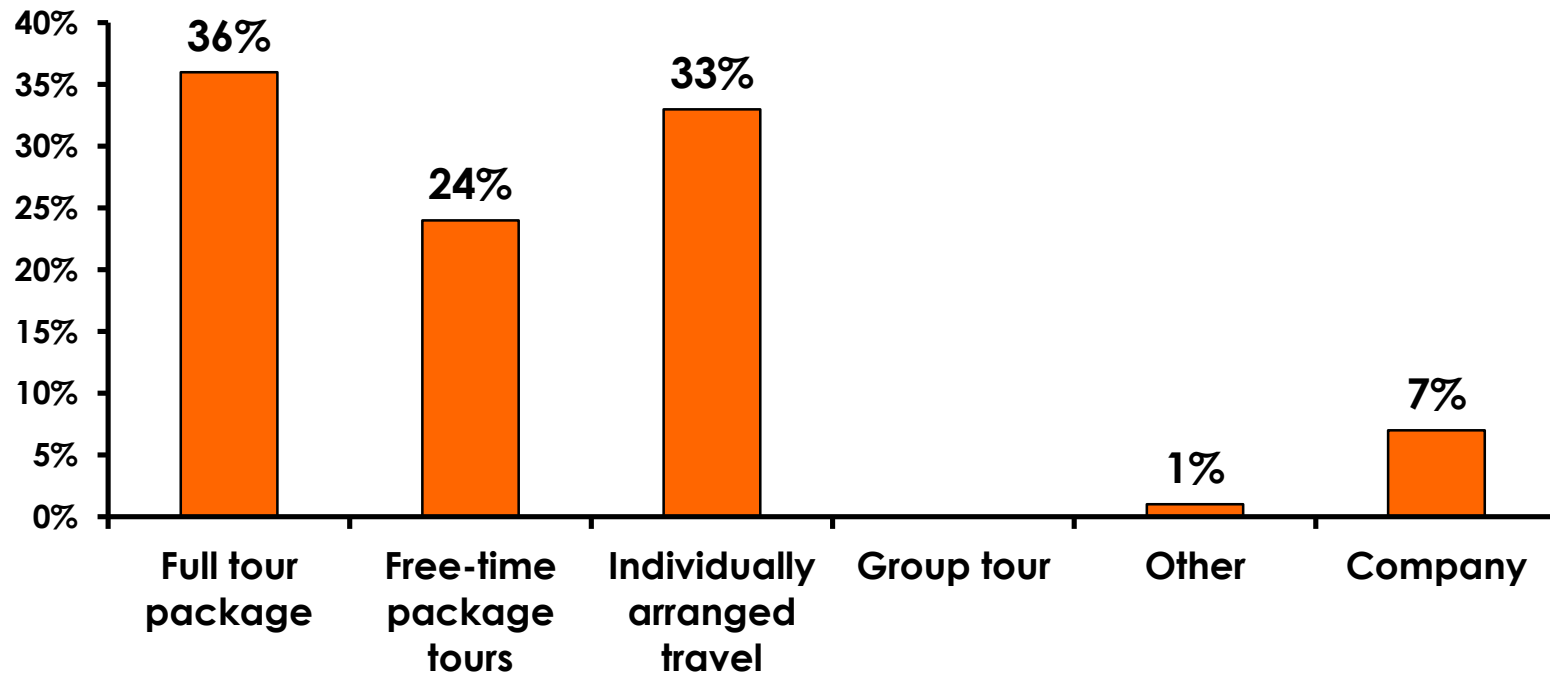


# Occupation by Income

		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	Self-employed	26%		5%	27%	50%	70%	14%	100%	
	Professional/ Specialist	25%		39%	29%	15%	10%			
	Company: Office/ Non-Mgr	13%	17%	27%	10%	4%				
	Homemaker	9%		5%	6%	12%	10%	43%		
	Company: Manager	6%		5%	10%	4%		14%		
	Company: Engineer	6%		7%	12%					
	Retired	5%	67%	7%						
	Student	3%	17%	2%				14%		
	Company: Exec	3%			2%	12%		14%		
	Other	2%			4%		10%			
	32	1%			2%					
	Teacher	1%				4%				
	Govt: Office/ Non-Mgr	1%		2%						
	Company: Salesperson	1%		2%						
	Total	Count	150	6	44	52	26	10	7	1

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



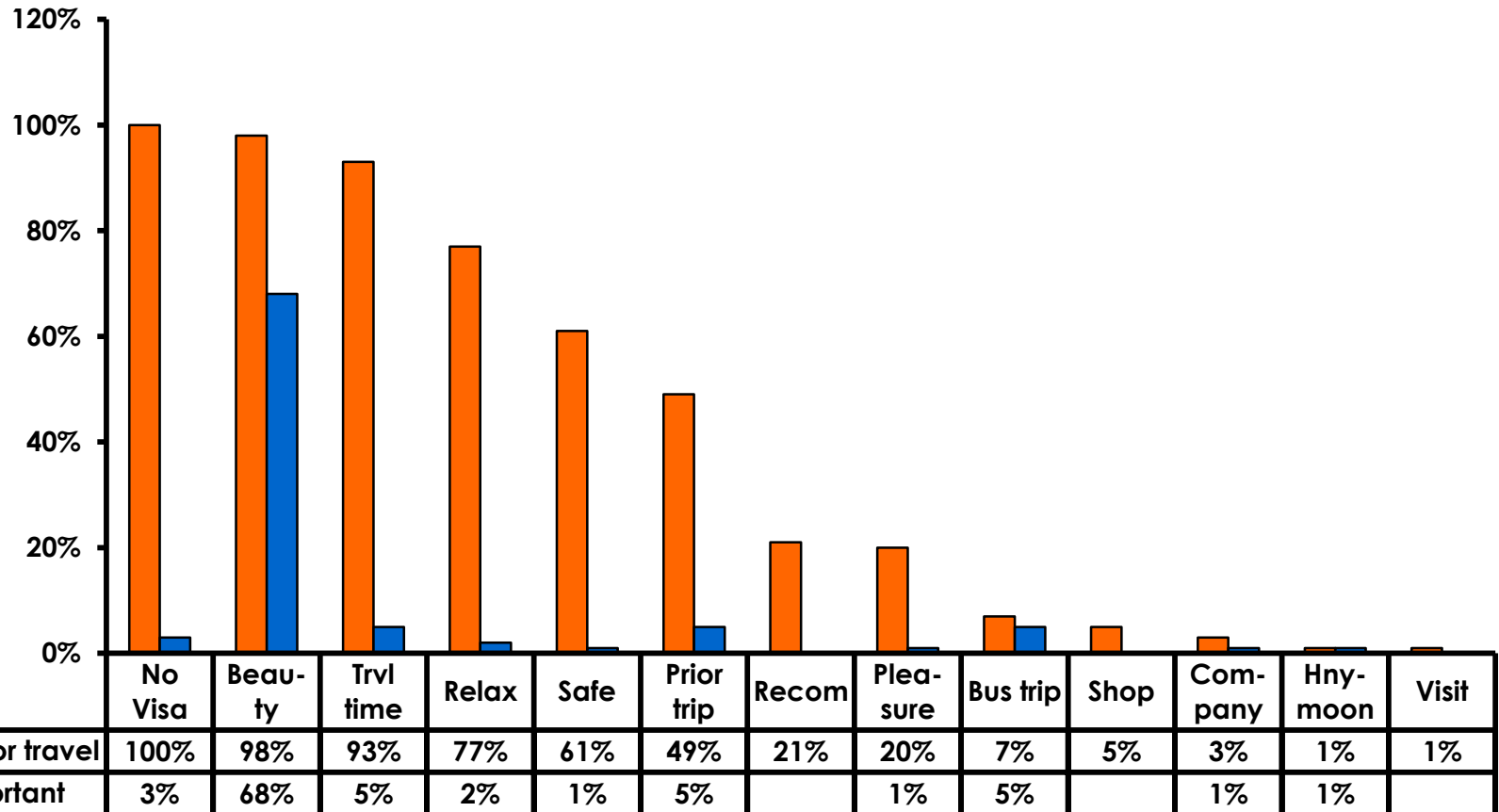
# Accommodation by Income

Average length of stay: 11.74 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	Westin Resort Guam	18%	17%	9%	23%	31%	10%			
	PIC Club	16%		14%	23%	19%				
	Lotte Hotel Guam	11%		9%	10%	8%	30%	14%	100%	
	Fiesta Resort Guam	9%	33%	9%	2%	19%				
	Hilton Guam Resort	7%		9%	12%		10%			
	Bayview Hotel	6%	17%	11%	4%			14%		
	Hyatt Regency Guam	6%		2%	4%	8%	40%			
	Tumon Bay Capital Hotel	4%	17%	5%	6%					
	Guam Reef & Olive Spa	4%	17%	5%	2%	4%	10%			
	Outrigger Guam Resort	4%		2%	4%	4%		29%		
	Verona Resort & Spa	3%			8%					
	Condo	3%		5%				14%		
	31	1%		2%				14%		
	Home stay/ friend/ relative	1%		5%						
	Grand Plaza Hotel	1%		5%						
	Hotel Nikko Guam	1%		2%	2%					
	Leo Palace Resort	1%		2%		4%				
	Apartment	1%				4%				
	Pacific Bay Hotel	1%						14%		
	Guam Plaza Hotel	1%		2%						
	Holiday Resort Guam	1%		2%						
	Pacific Star Resort & Spa	1%			2%					
	Total	Count	150	6	44	52	26	10	7	1



# Travel Motivation - Top Responses



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# Most Important Reason for Choosing Guam

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

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	100%	100%	100%	100%	100%	100%	100%	
	Natural beauty	98%	100%	93%	100%	100%	97%	99%	
	Short travel time	93%	90%	93%	89%	97%	92%	93%	
	Relax	77%	80%	67%	81%	78%	83%	69%	
	Safe	61%	60%	54%	70%	56%	68%	54%	
	Previous trip	49%	30%	50%	47%	56%	47%	51%	
	Recomm- friend/family/trvl agnt	21%	30%	20%	17%	25%	23%	18%	
	Pleasure	20%	20%	15%	23%	22%	22%	18%	
	Other	11%	20%	15%	9%	8%	8%	15%	
	Company/ Business Trip	7%		13%	8%		5%	8%	
	Shopping	5%	10%		8%	6%	8%	1%	
	Company Sponsored	3%		9%				6%	
	Honeymoon	1%			4%		3%		
	Visit friends/ Relatives	1%			2%	3%	1%	1%	
	Price	1%		2%	2%			3%	
	Scuba	1%			2%		1%		
	Total	Count	149	10	46	53	36	78	71

# 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	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Natural beauty	98%	100%	95%	98%	100%	100%	100%	100%	100%
	Short travel time	93%	100%	86%	94%	100%	100%	83%	100%	
	Relax	77%	83%	68%	83%	81%	80%	50%	100%	
	Safe	61%	50%	50%	67%	58%	80%	83%	100%	
	Previous trip	49%	33%	32%	56%	54%	80%	67%		
	Recomm- friend/family/trvl agnt	21%	33%	23%	17%	19%	10%	17%	100%	
	Pleasure	20%	17%	25%	17%	19%	10%	17%	100%	
	Other	11%		7%	8%	19%		67%		
	Company/ Business Trip	7%		14%	8%					
	Shopping	5%		2%	6%	4%	10%		100%	
	Company Sponsored	3%		7%	2%					
	Honeymoon	1%					10%	17%		
	Visit friends/ Relatives	1%				4%		17%		
	Price	1%		2%	2%					
	Scuba	1%			2%					
	Total	Count	149	6	44	52	26	10	6	1

# SECTION 3 **EXPENDITURES**

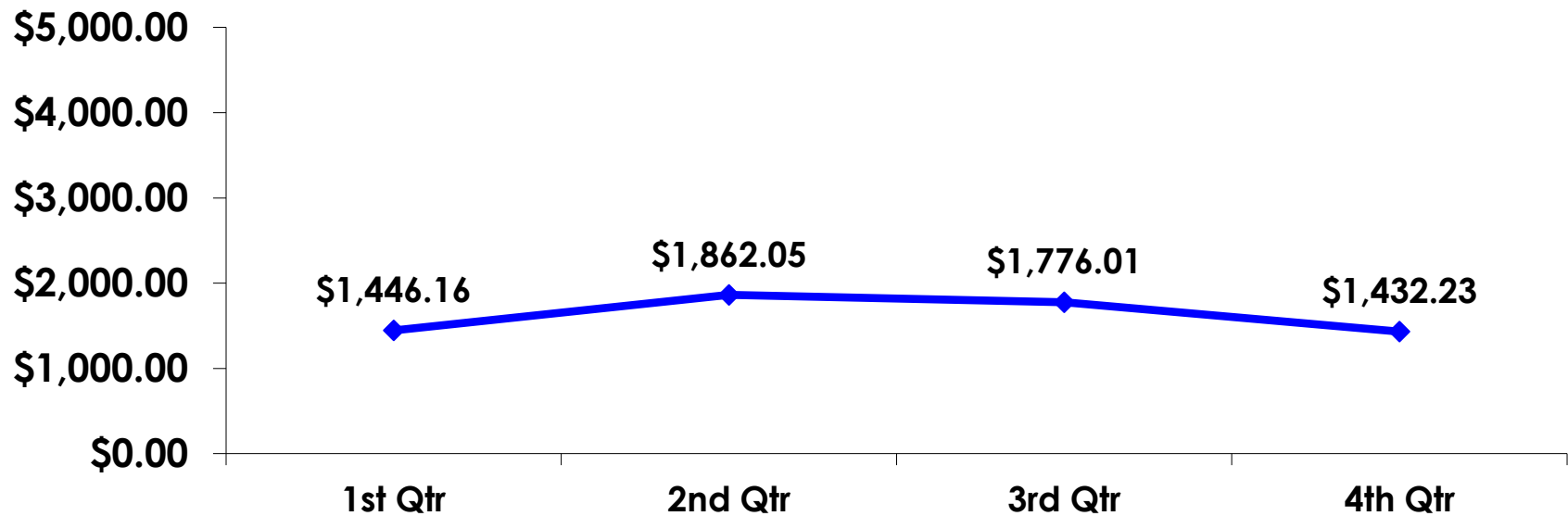
# Prepaid Expenditures

Ruble 62.59 /US\$1

- \$3,402.35 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$7,988 = maximum (highest amount recorded for the entire sample)
- \$1,432.23 = overall mean average per person prepaid expenditures

# PREPAID EXPENDITURES

## Per Person



YTD=\$1,629.36

# Breakdown of Prepaid Expenditures

## Rub 52.72=\$1

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

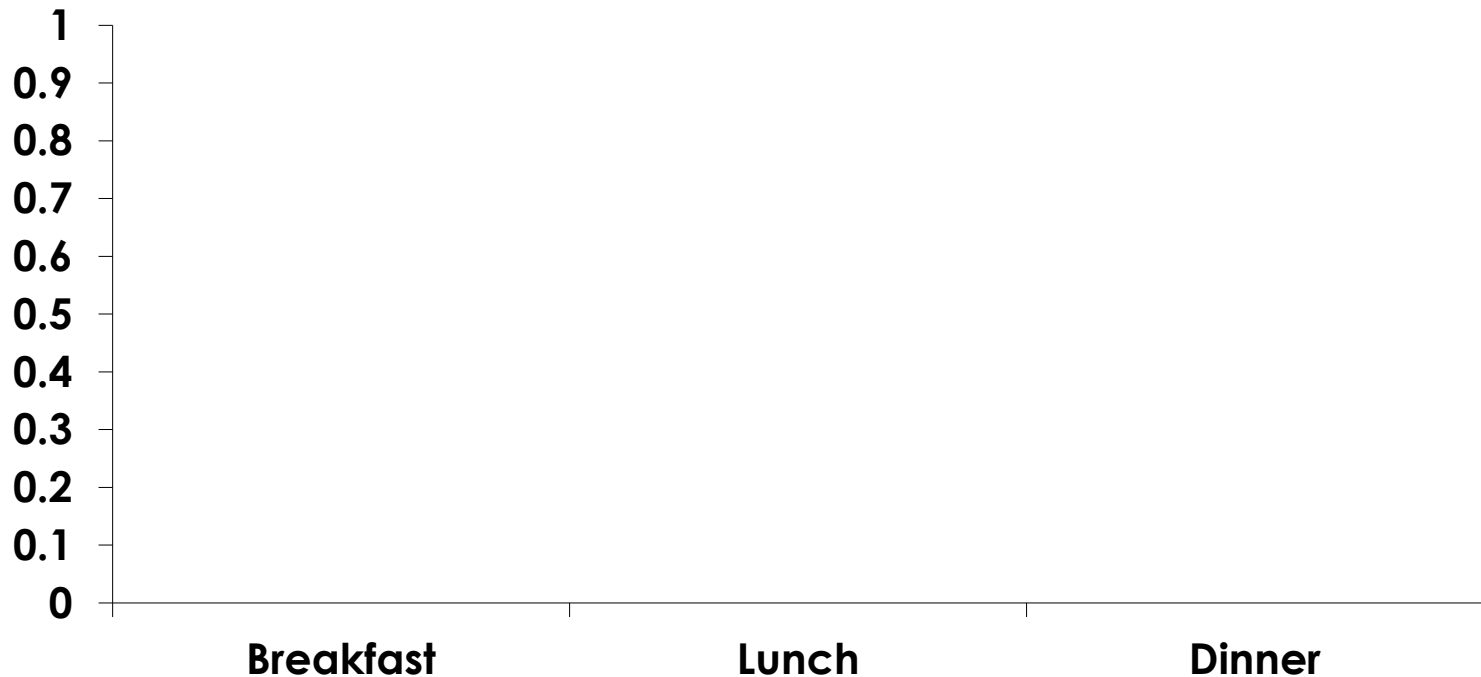
	<b>MEAN \$</b>
Air & Accommodation package only	\$2,950.99
Air & Accommodation w/ daily meal package	\$5,304.03
Air only	\$656.06
Accommodation only	\$479.31
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation – Russia	\$-
Ground transportation – Guam	\$-
Optional tours/ activities	\$-
Other expenses	\$-
<b>Total Prepaid</b>	<b>\$3,402.35</b>



# PREPAID MEAL BREAKDOWN

**Air/ Accommodations with Daily Meal Pkg.**

**n= (none recorded)**

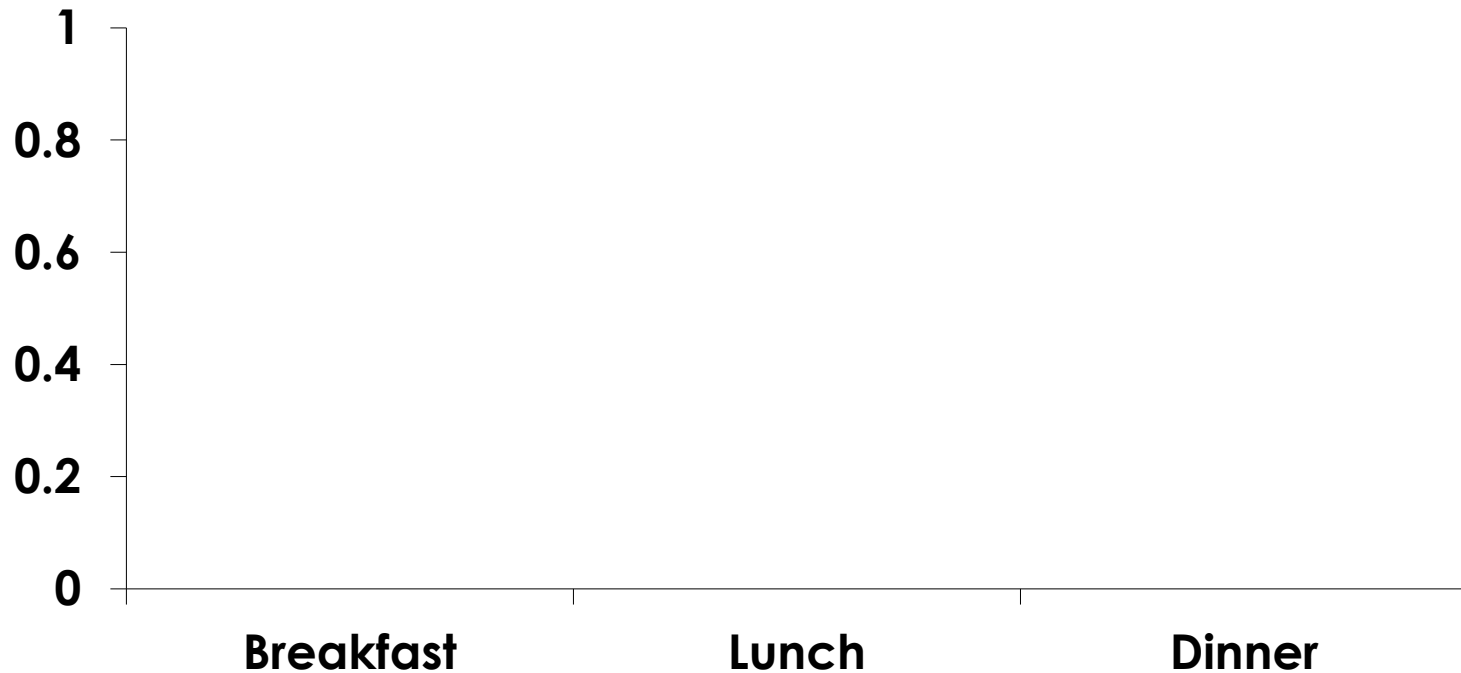


**Mean=\$5,304.03 per travel party**

# PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

**n=x**



Mean=\$x per travel party

# PREPAID GROUND TRANSPORTATION

**n=x**



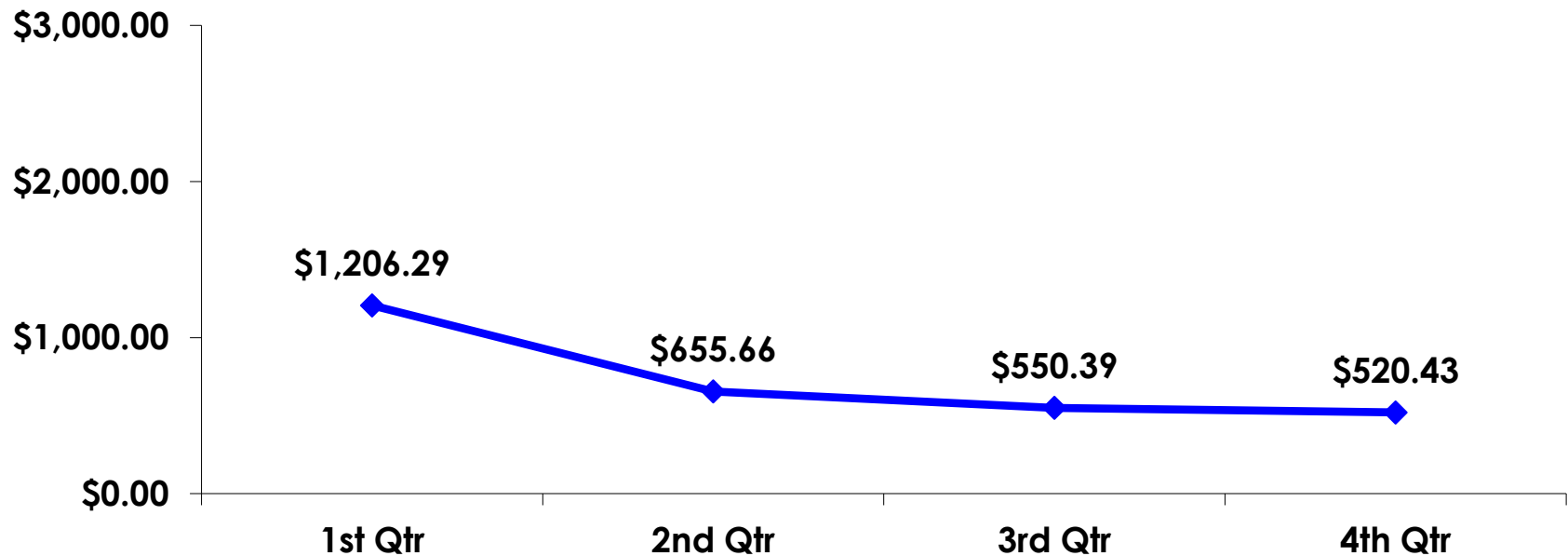
**Mean=\$xxx per travel party**

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# On-Island Expenditures

- \$969.18 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,600 = Maximum (highest amount recorded for the entire sample)
- \$520.43 = overall mean average per person on-island expenditure

# ON-ISLAND EXPENDITURES Per Person



YTD = \$732.89

# 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	\$520.43	\$502.03	\$540.37	\$442.50	\$338.17	\$529.13	\$578.25	\$344.76	\$530.13	\$517.75	\$666.09
	Median	\$471	\$437	\$500	\$440	\$333	\$473	\$540	\$300	\$450	\$500	\$588
	Minimum	\$0	\$0	\$0	\$0	\$107	\$160	\$167	\$0	\$177	\$240	\$250
	Maximum	\$2,000	\$2,000	\$1,190	\$890	\$610	\$2,000	\$1,200	\$860	\$1,150	\$1,000	\$1,190

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$72.57	\$78.01	\$66.67	\$26.36	\$65.43	\$94.43	\$60.56
	Median	\$15	\$30	\$5	\$0	\$50	\$70	\$0
F&B FF/STORE	Mean	\$102.20	\$91.22	\$114.10	\$97.27	\$92.39	\$111.51	\$111.11
	Median	\$100	\$100	\$100	\$100	\$100	\$100	\$110
F&B RESTRNT	Mean	\$161.03	\$179.42	\$141.11	\$32.27	\$149.46	\$201.13	\$155.83
	Median	\$180	\$200	\$150	\$0	\$200	\$200	\$150
OPT TOUR	Mean	\$141.03	\$191.15	\$86.74	\$39.09	\$92.07	\$193.02	\$150.56
	Median	\$90	\$100	\$60	\$0	\$55	\$100	\$100
GIFT- SELF	Mean	\$231.47	\$247.95	\$213.61	\$157.27	\$218.04	\$264.15	\$228.61
	Median	\$200	\$200	\$200	\$190	\$200	\$170	\$200
GIFT- OTHER	Mean	\$146.83	\$143.97	\$149.93	\$61.36	\$171.96	\$136.98	\$159.17
	Median	\$100	\$100	\$100	\$75	\$100	\$100	\$115
TRANS	Mean	\$104.81	\$142.85	\$63.61	\$25.45	\$68.59	\$131.08	\$125.83
	Median	\$50	\$60	\$40	\$40	\$45	\$60	\$50
OTHER	Mean	\$23.77	\$16.22	\$31.94	\$18.18	\$24.13	\$23.49	\$27.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$969.18	\$1,085.92	\$842.71	\$457.27	\$842.93	\$1,148.62	\$1,019.17
	Median	\$890	\$1,000	\$800	\$500	\$855	\$1,000	\$1,000

# On-Island Expenditures

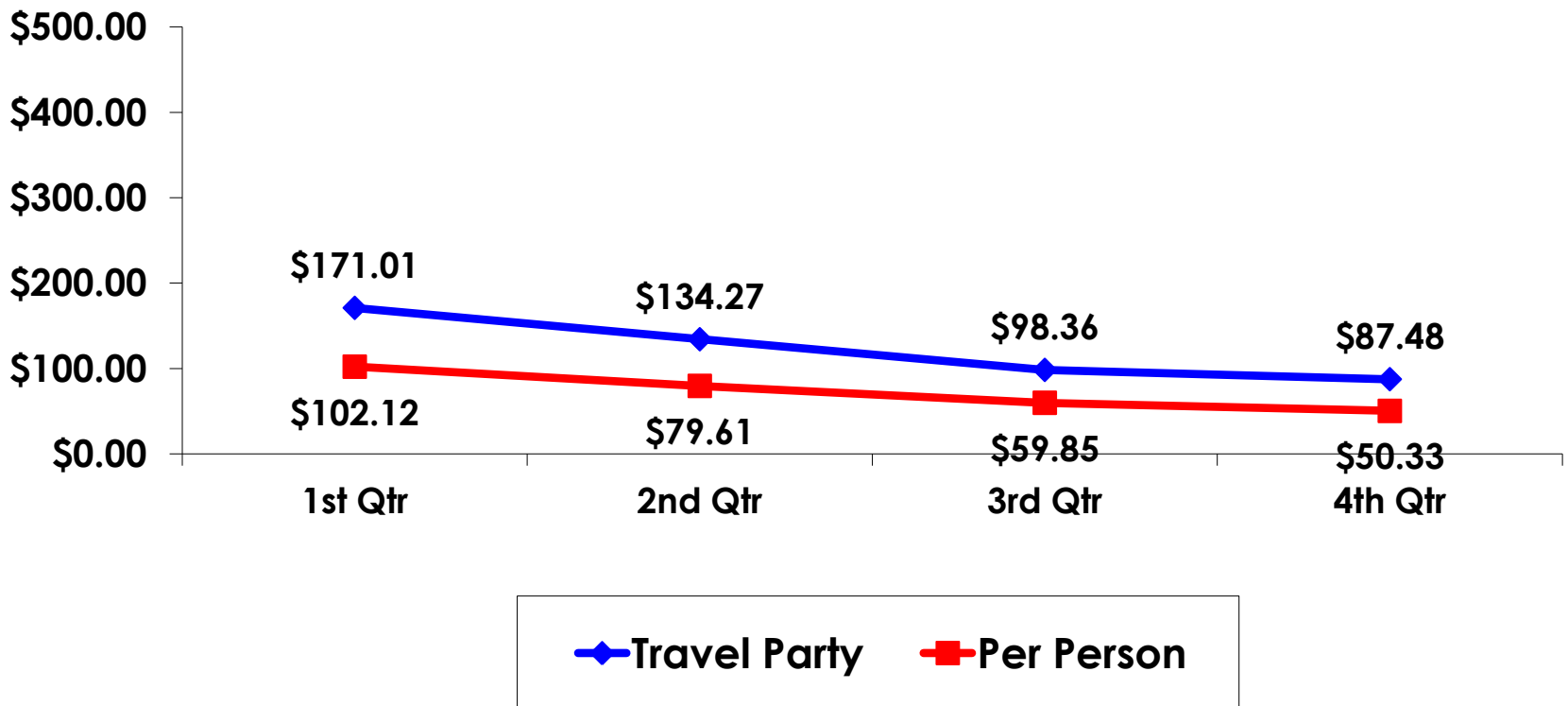
## First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$72.57	\$70.82	\$74.22
	Median	\$15	\$0	\$50
F&B FF/STORE	Mean	\$102.20	\$92.60	\$111.30
	Median	\$100	\$100	\$100
F&B RESTRNT	Mean	\$161.03	\$167.12	\$155.26
	Median	\$180	\$200	\$160
OPT TOUR	Mean	\$141.03	\$188.90	\$95.65
	Median	\$90	\$100	\$60
GIFT- SELF	Mean	\$231.47	\$258.22	\$206.10
	Median	\$200	\$200	\$190
GIFT- OTHER	Mean	\$146.83	\$154.86	\$139.22
	Median	\$100	\$120	\$100
TRANS	Mean	\$104.81	\$108.22	\$101.58
	Median	\$50	\$50	\$50
OTHER	Mean	\$23.77	\$18.70	\$28.57
	Median	\$0	\$0	\$0
TOTAL	Mean	\$969.18	\$1,054.25	\$888.53
	Median	\$890	\$900	\$850



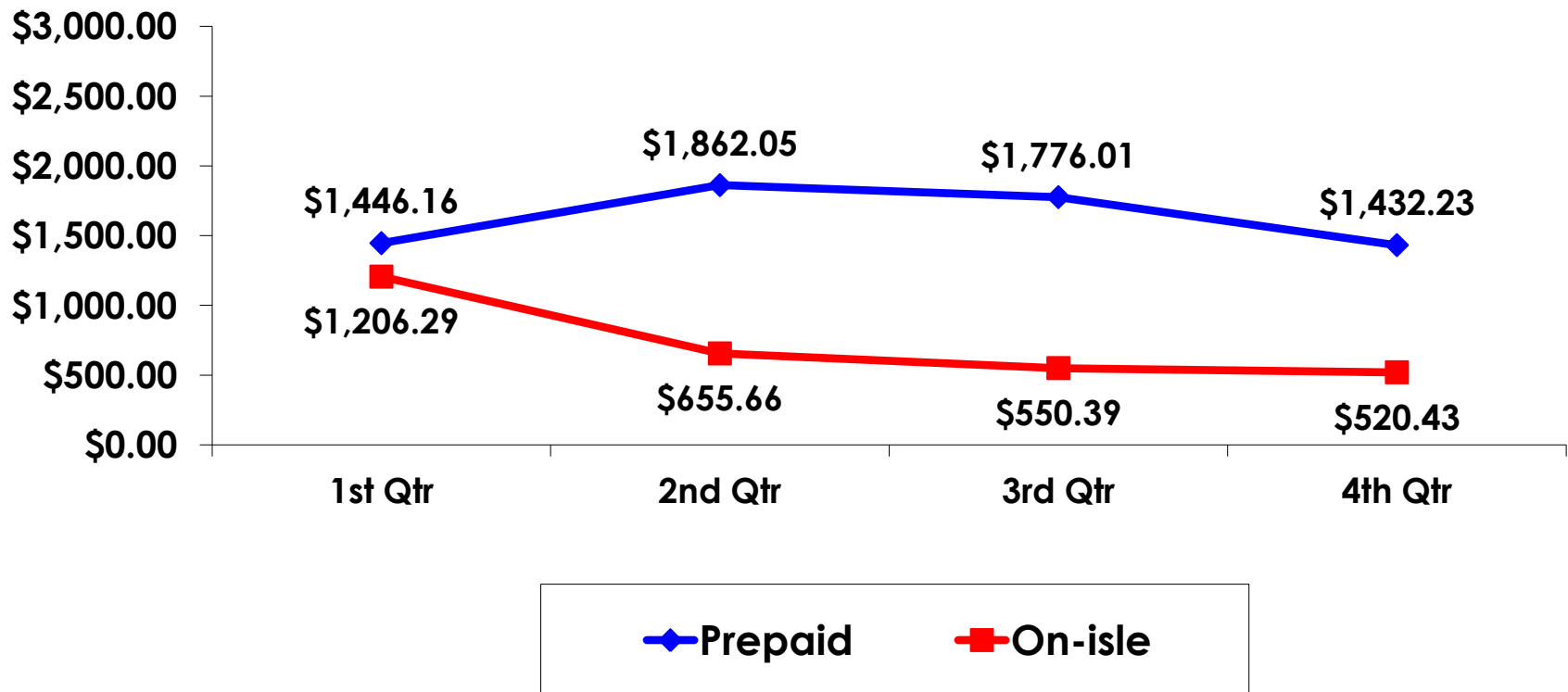
# ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$122.44    Per Person YTD = \$72.96



# PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$1,629.36    On-Isle YTD = \$732.89

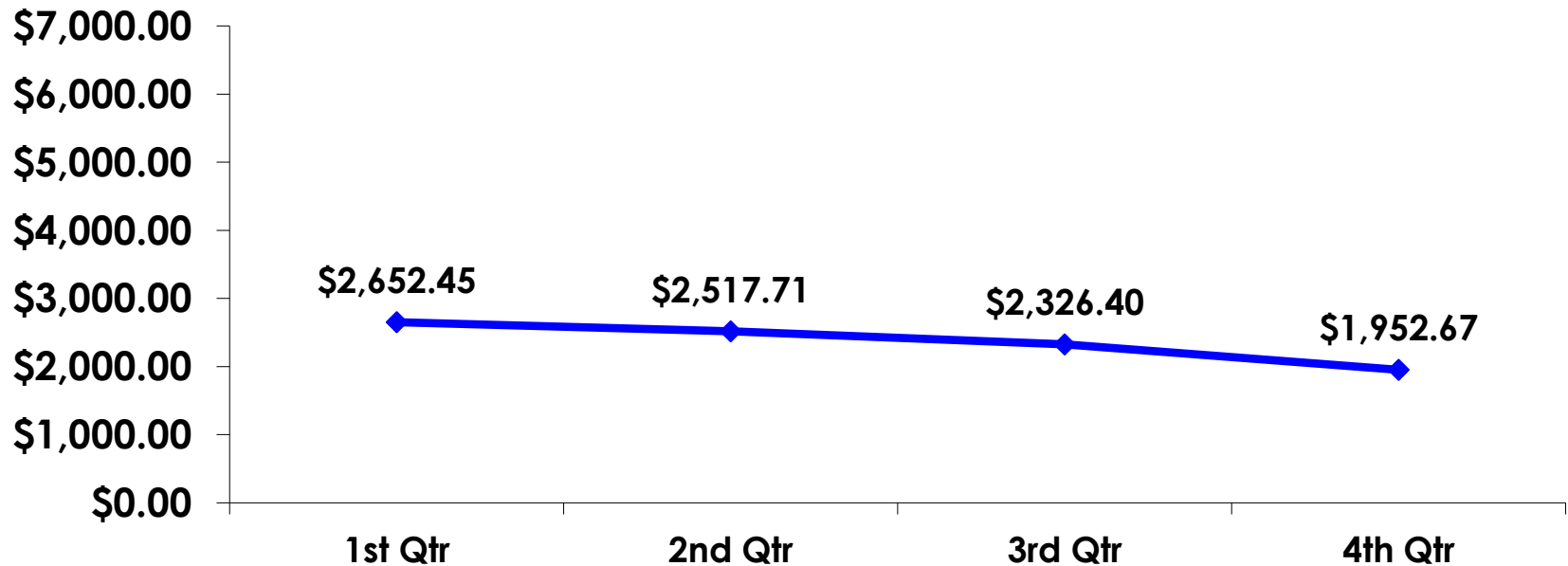


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# Total Expenditures Per Person (Prepaid & On-Island)

- \$1,952.67 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,495 = Maximum (highest amount recorded for the entire sample)

# TOTAL EXPENDITURES Per Person



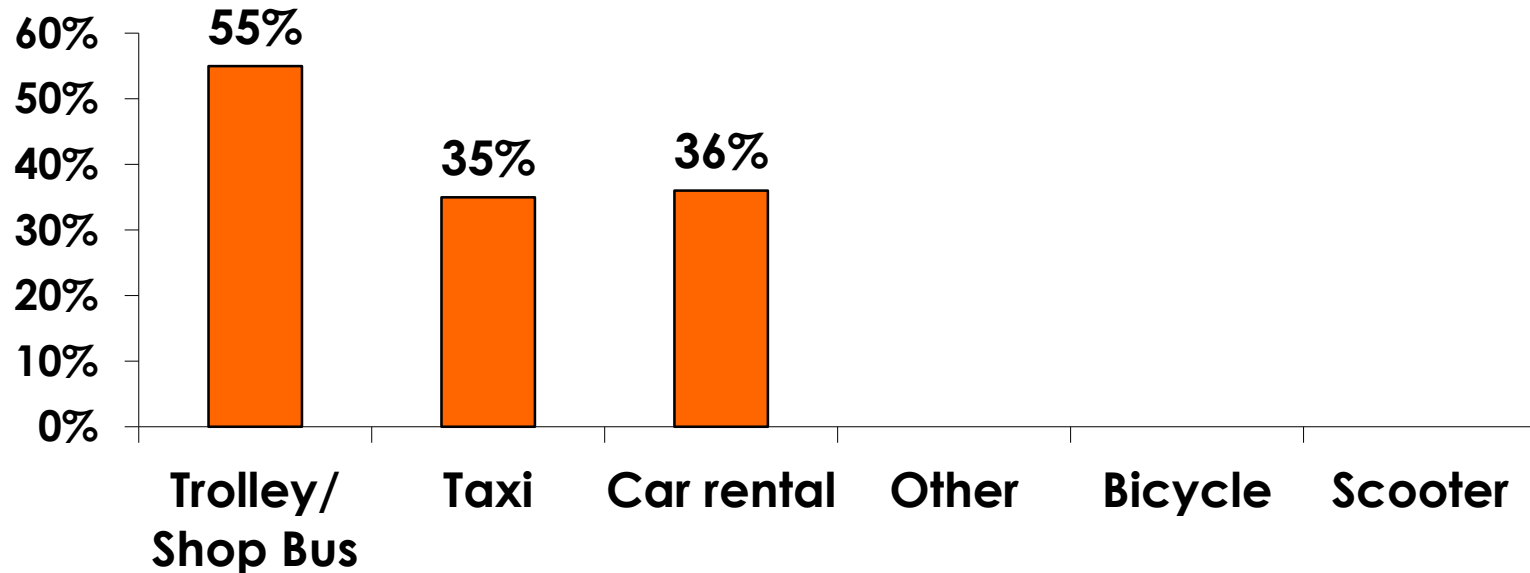
YTD=\$2,362.24

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$72.57
Food & beverage in fast food restaurant/convenience store	\$102.20
Food & beverage at restaurants or drinking establishments outside a hotel	\$161.03
Optional tours and activities	\$141.03
Gifts/ souvenirs for yourself/companions	\$231.47
Gifts/ souvenirs for friends/family at home	\$146.83
Local transportation	\$104.81
Other expenses not covered	\$23.77
<b>Average Total</b>	<b>\$969.18</b>

# Local Transportation

n=124



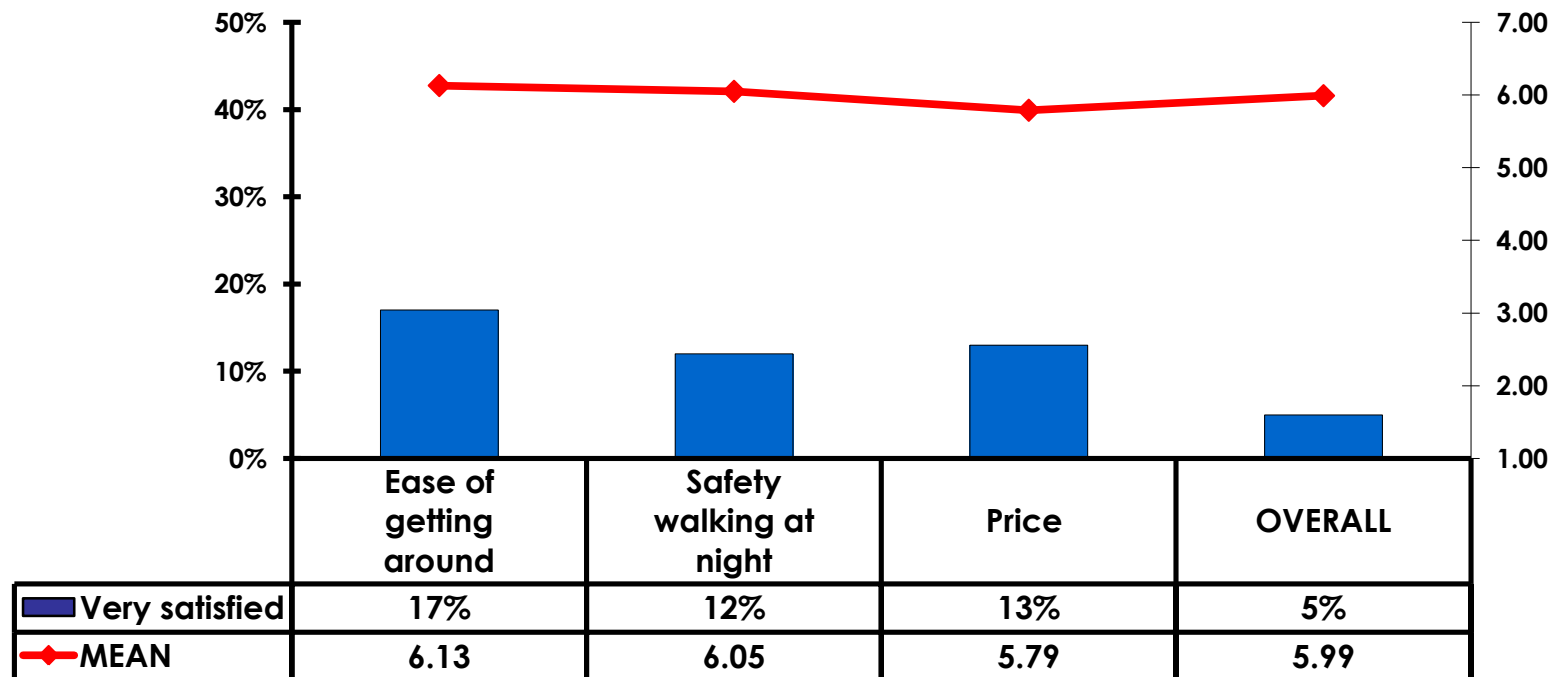
Mean=\$104.81 per travel party

# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied

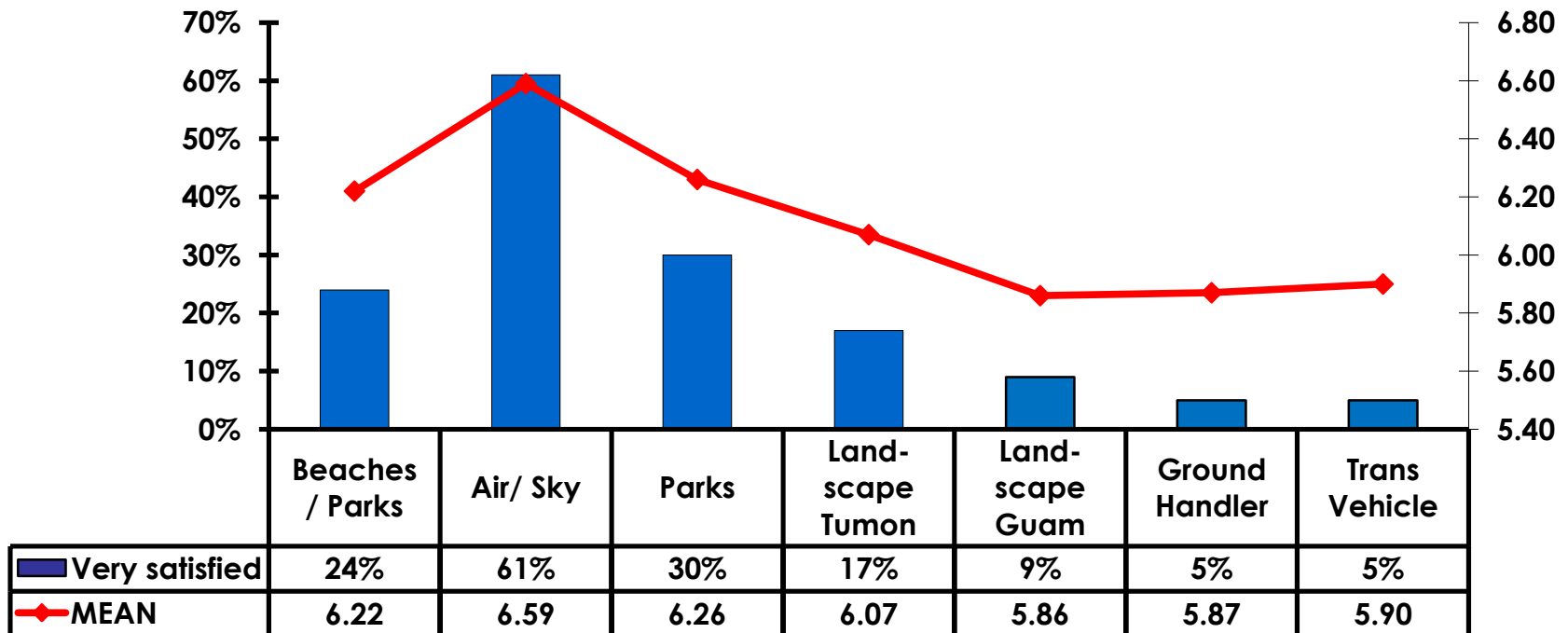




# Satisfaction Quality/ Cleanliness

7pt Rating Scale

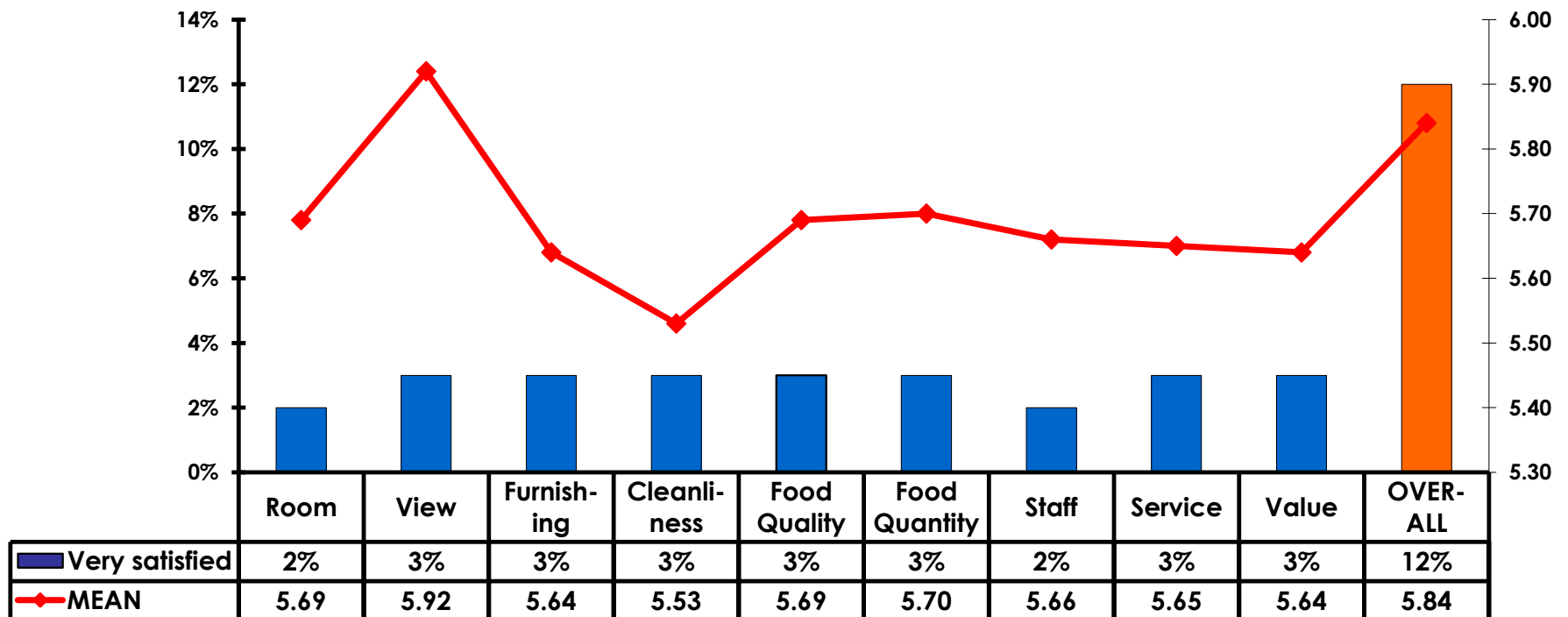
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

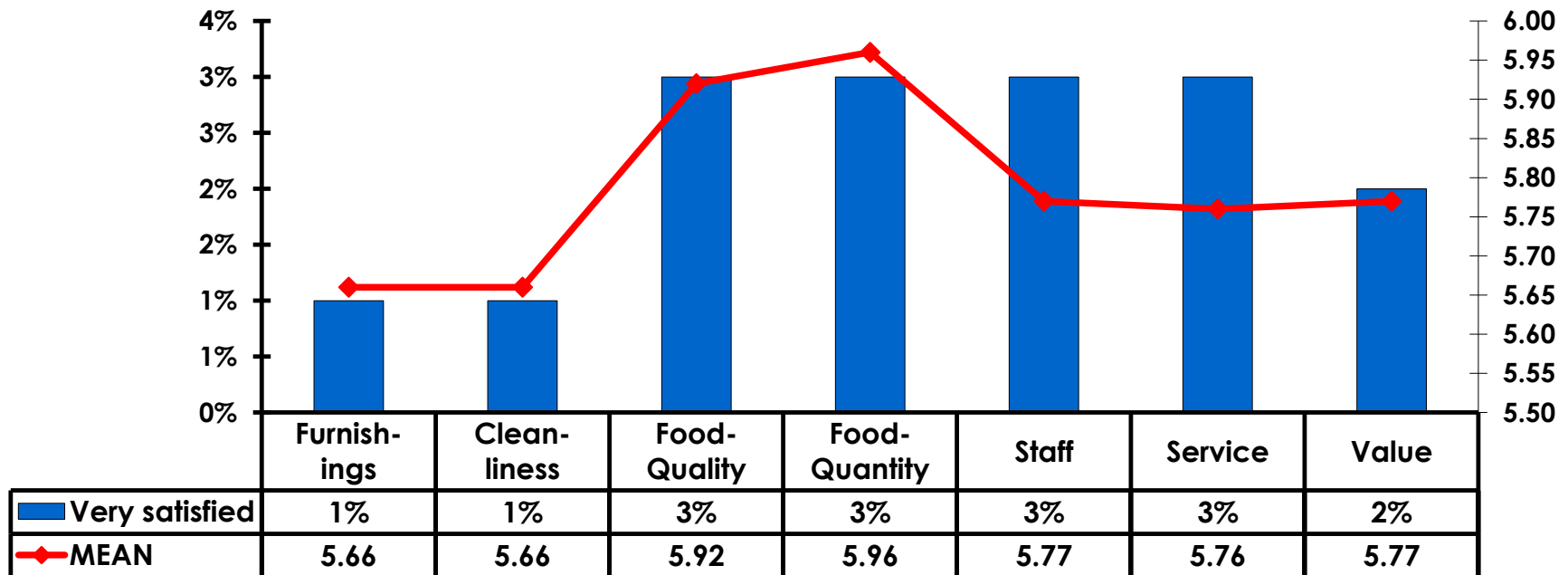
7=Very Satisfied/1=Very Dissatisfied



# 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

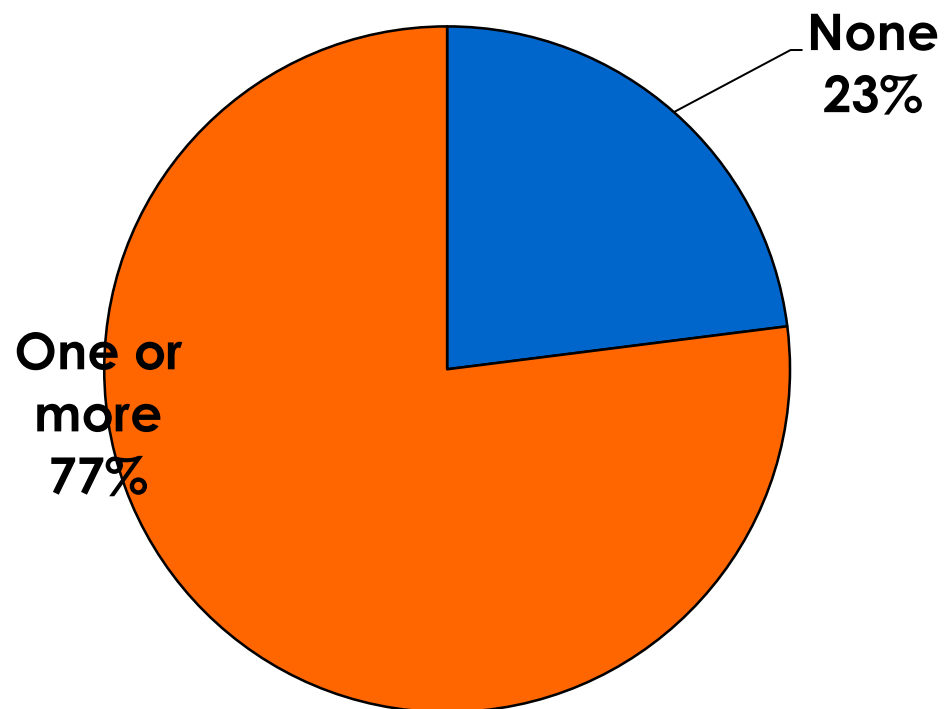
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>61%</b>	Score of 6 to 7 = <b>57%</b>
Score of 4 to 5 = <b>40%</b>	Score of 4 to 5 = <b>43%</b>
Score 1 to 3 = <b>-%</b>	Score 1 to 3 = <b>-%</b>
<b>MEAN = 5.58</b>	<b>MEAN = 5.55</b>

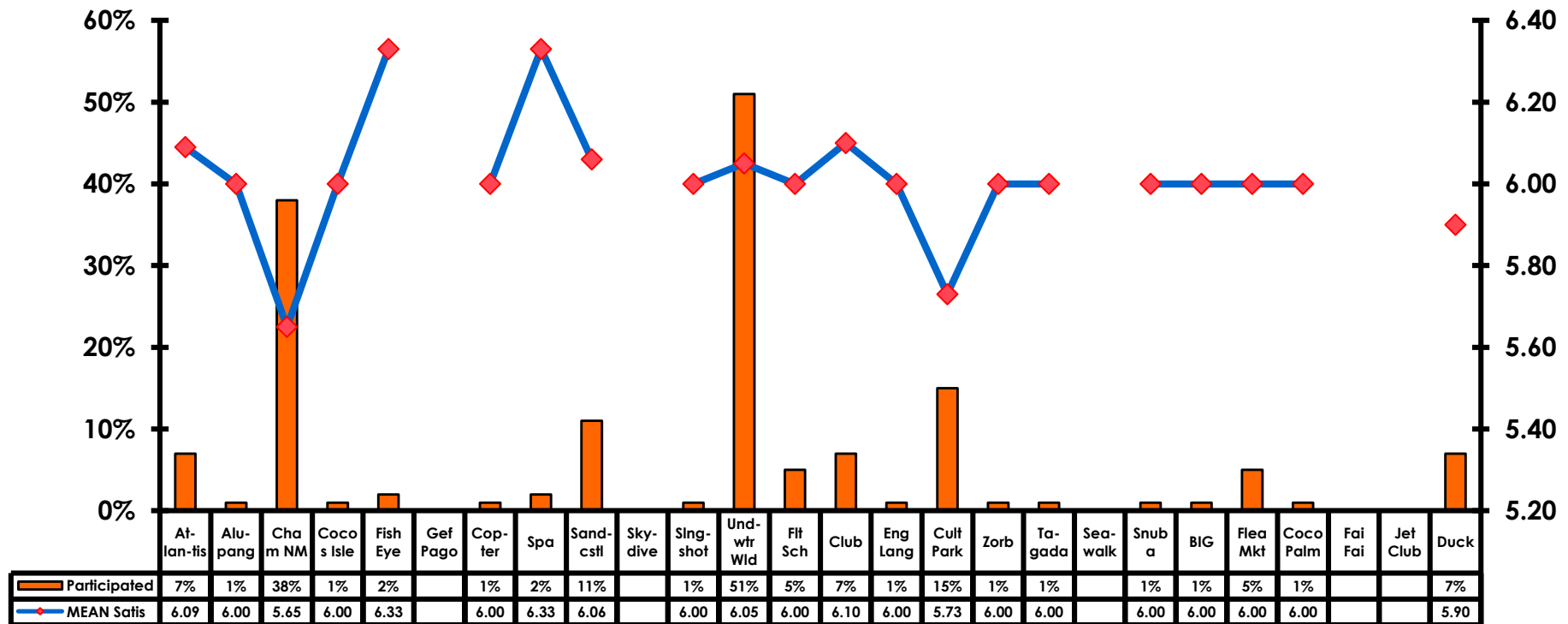
# Optional Tour Participation

- Average number of tours participated in is 2.31



# 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>86%</b>	Score of 6 to 7 = <b>58%</b>
Score of 4 to 5 = <b>14%</b>	Score of 4 to 5 = <b>41%</b>
Score 1 to 3 = <b>-%</b>	Score 1 to 3 = <b>-%</b>
<b>MEAN = 5.99</b>	<b>MEAN = 5.57</b>



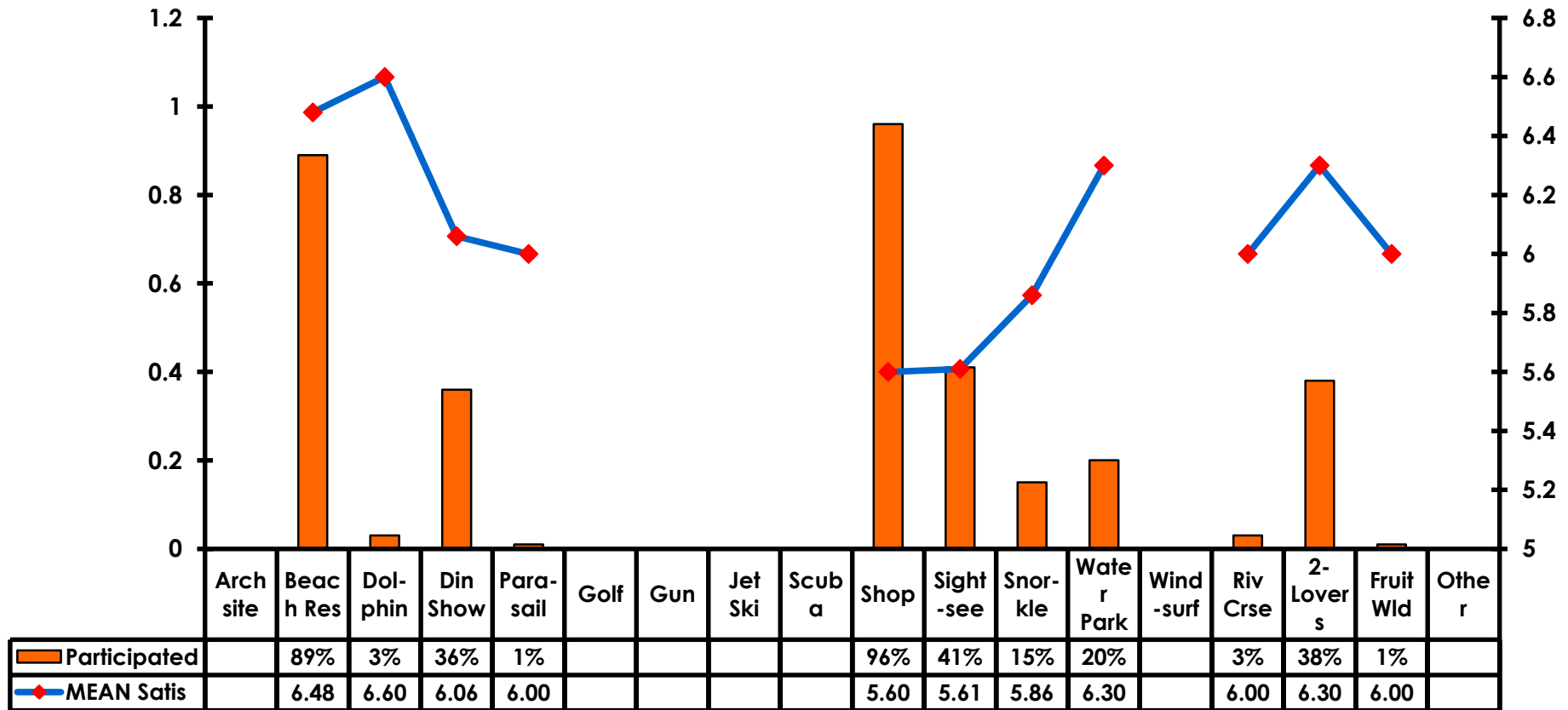
# Night Tours Satisfaction

7pt Rating Scale

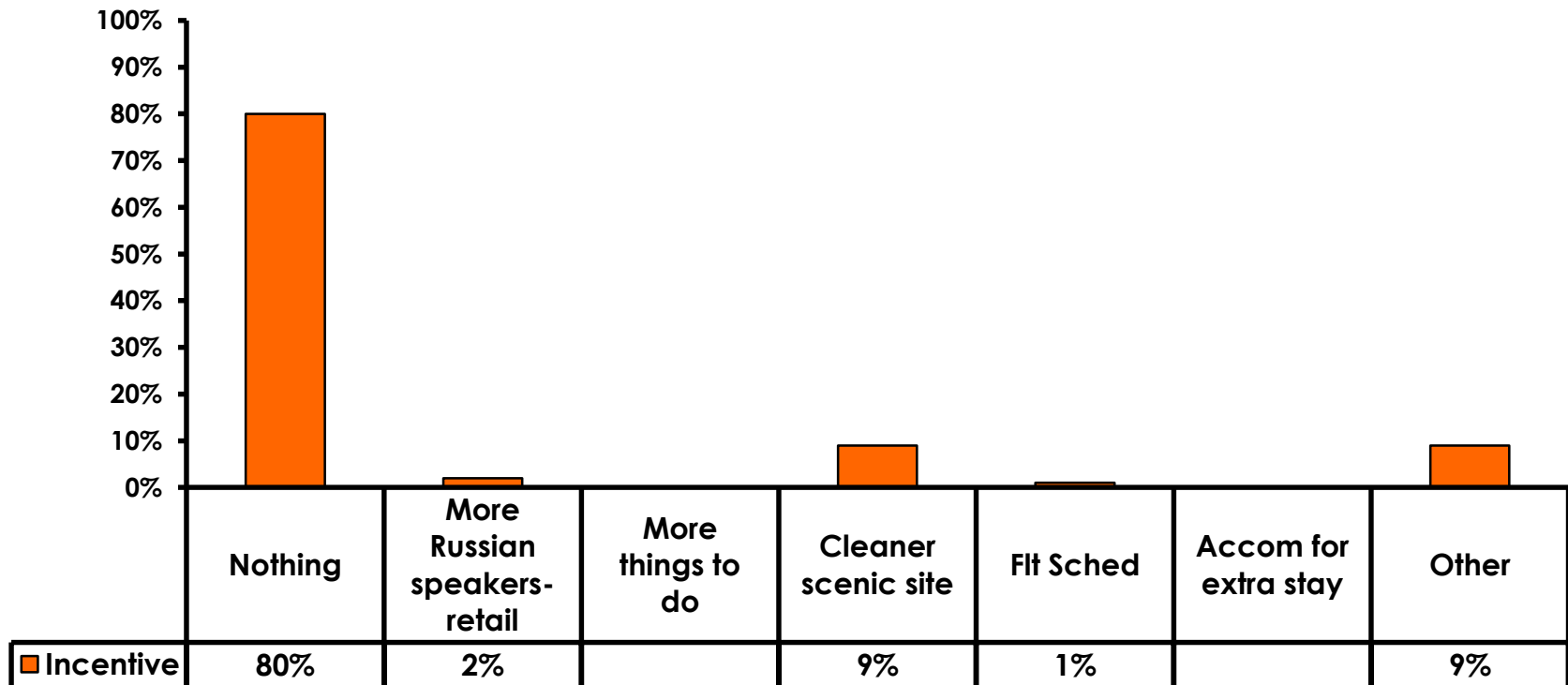
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>70%</b>	Score of 6 to 7 = <b>53%</b>
Score of 4 to 5 = <b>30%</b>	Score of 4 to 5 = <b>47%</b>
Score 1 to 3 = <b>-%</b>	Score 1 to 3 = <b>-%</b>
<b>MEAN = 5.76</b>	<b>MEAN = 5.50</b>

# Satisfaction with Other Activities



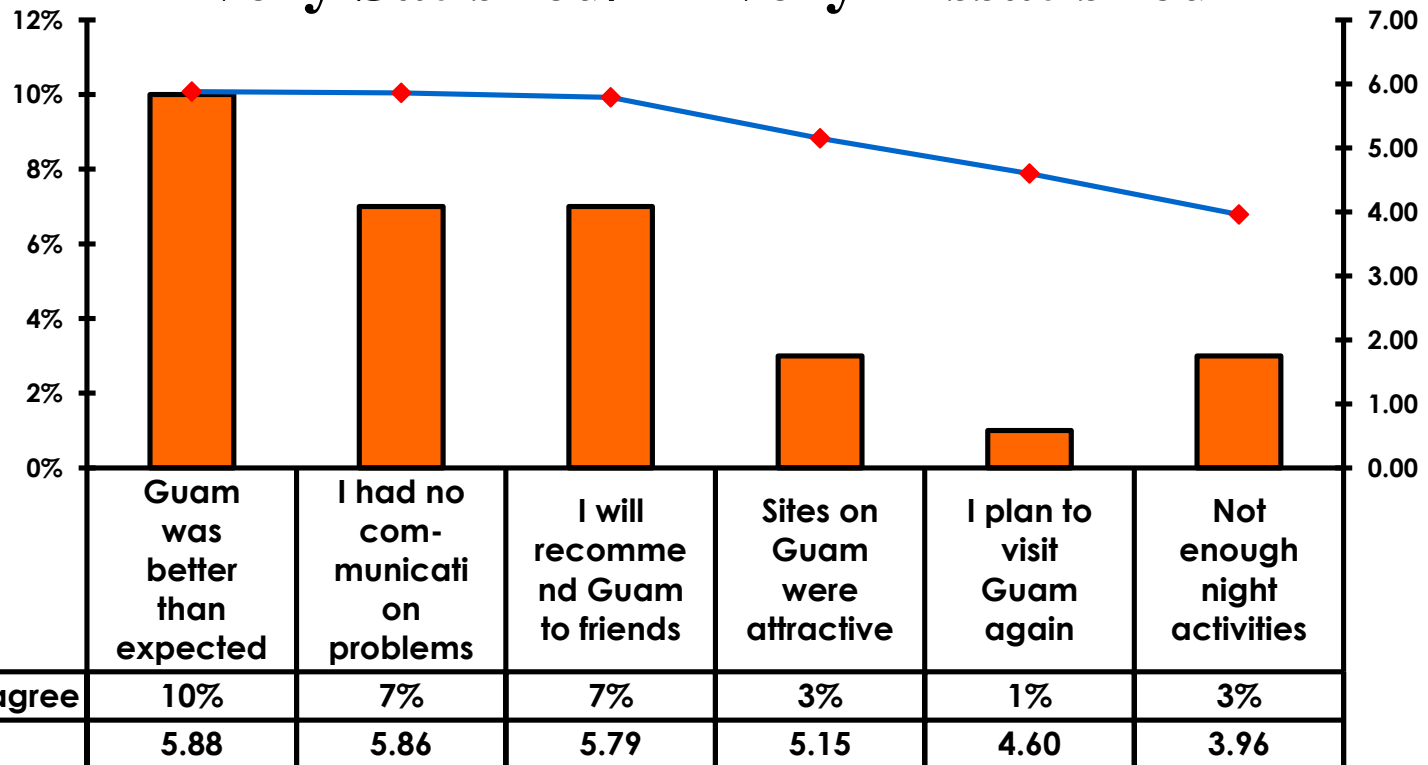
# What would it take to make Guam more enjoyable for families?



# On-Island Perceptions

7pt Rating Scale

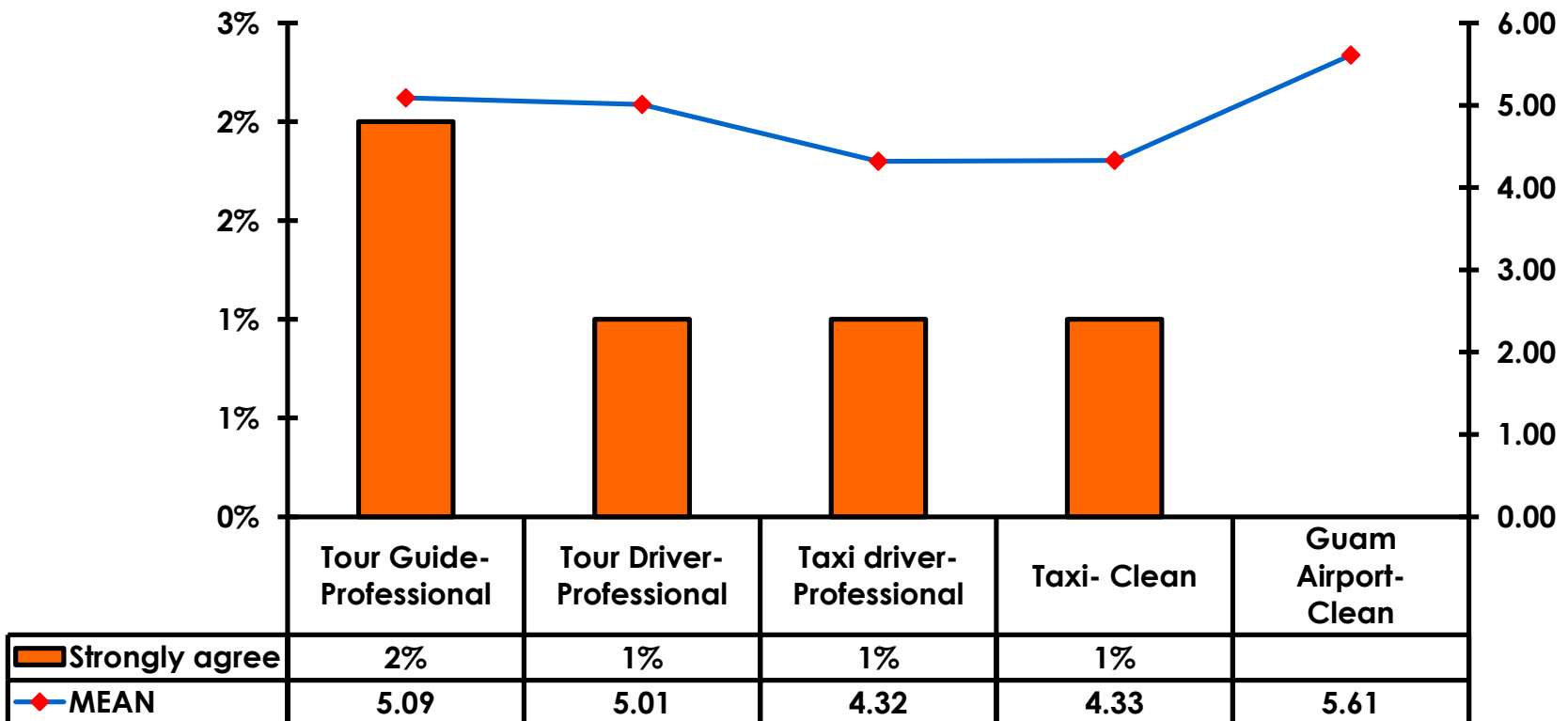
7=Very Satisfied/ 1=Very Dissatisfied



# Transportation

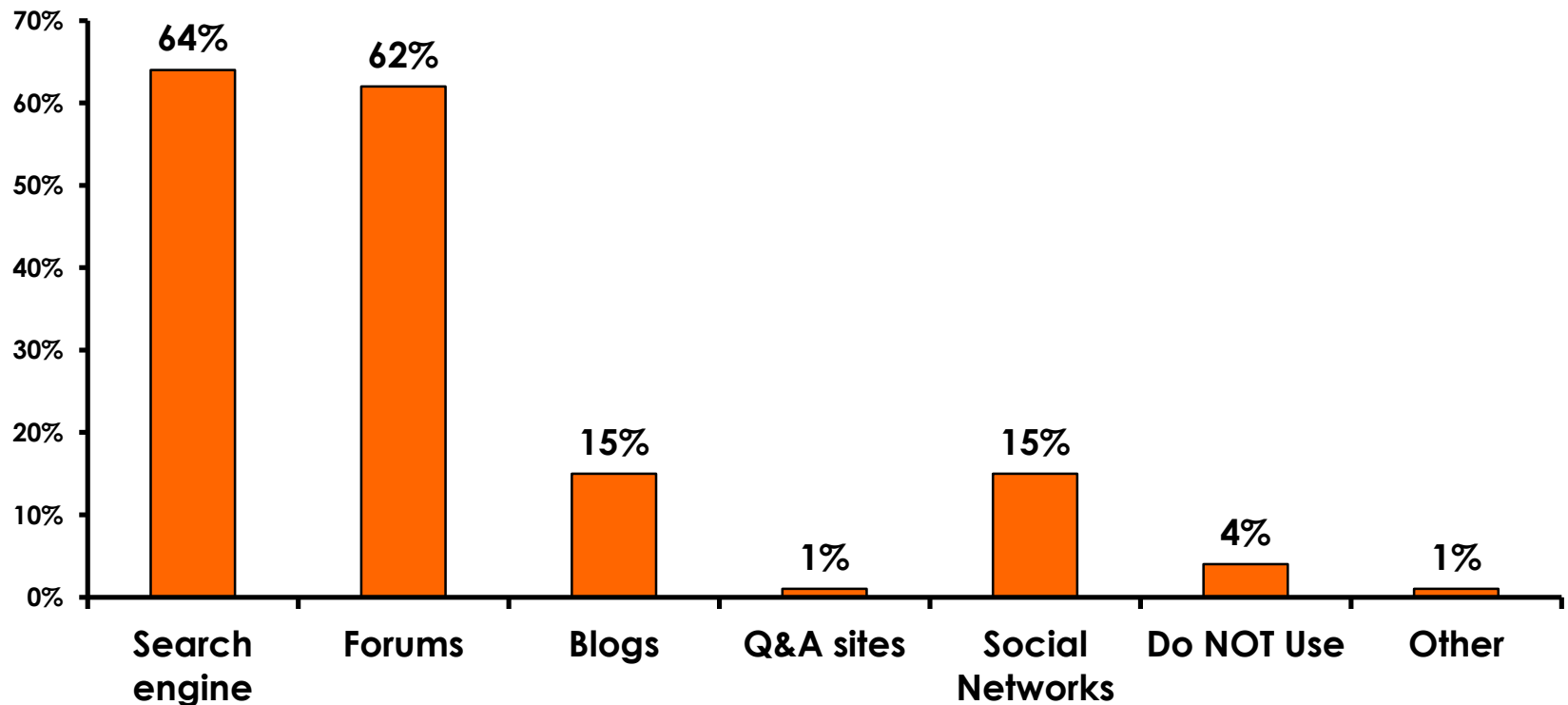
7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



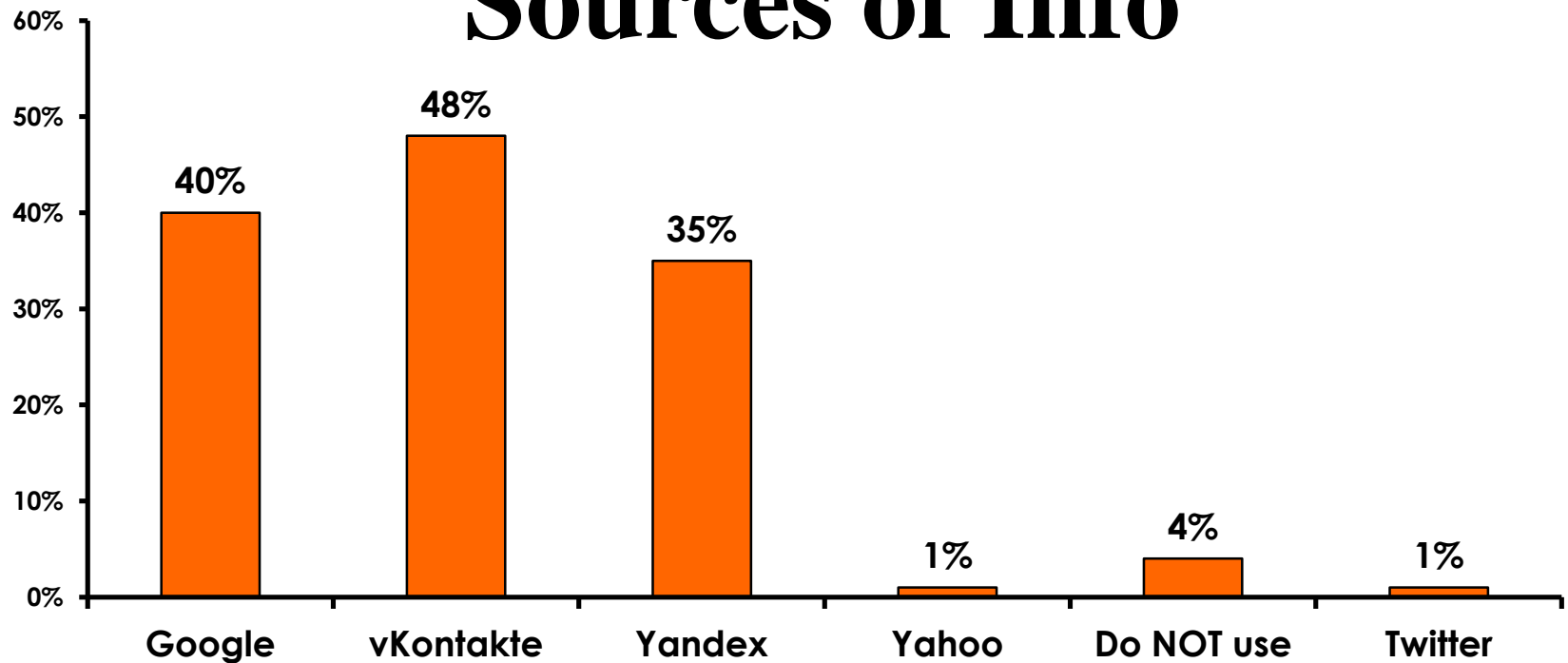
# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info



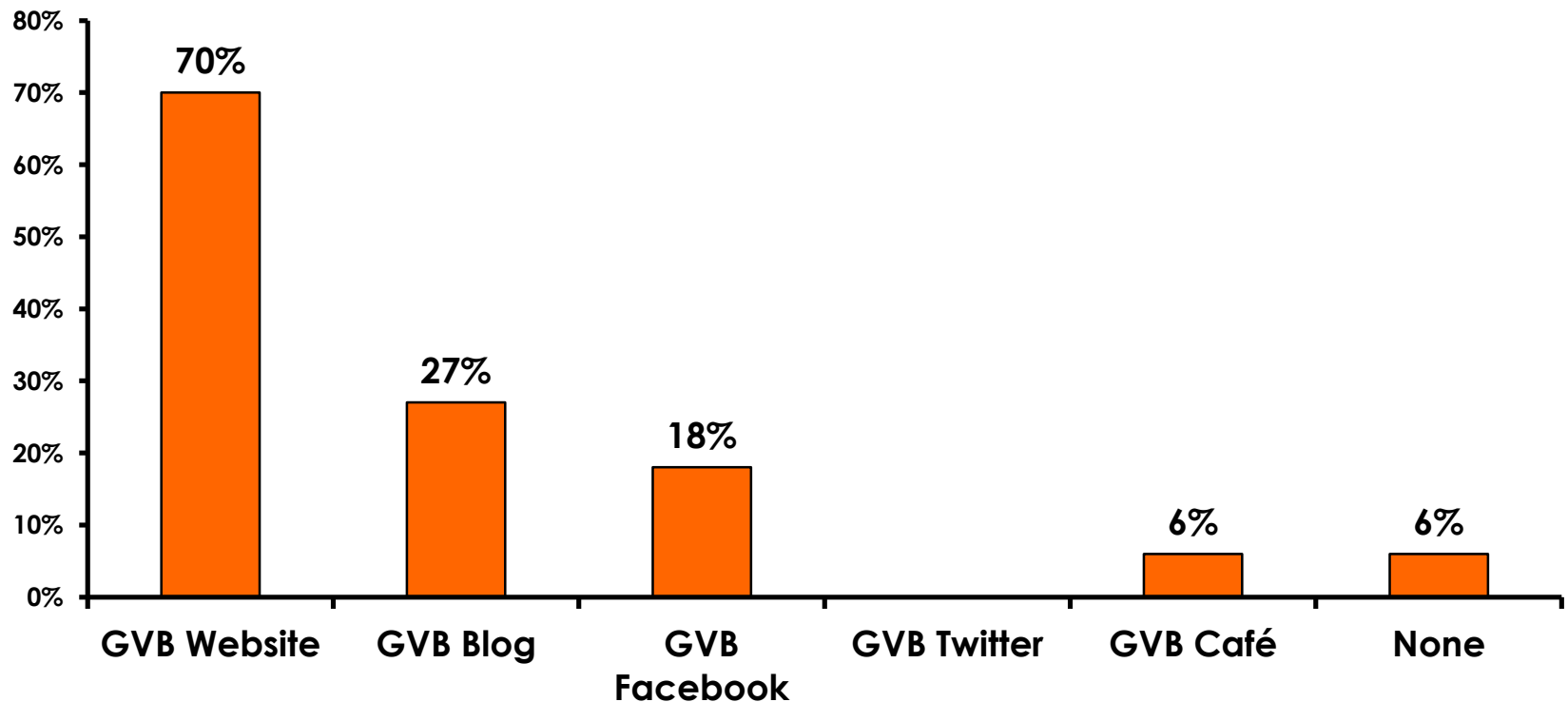
# Internet- Things To Do

## Sources of Info

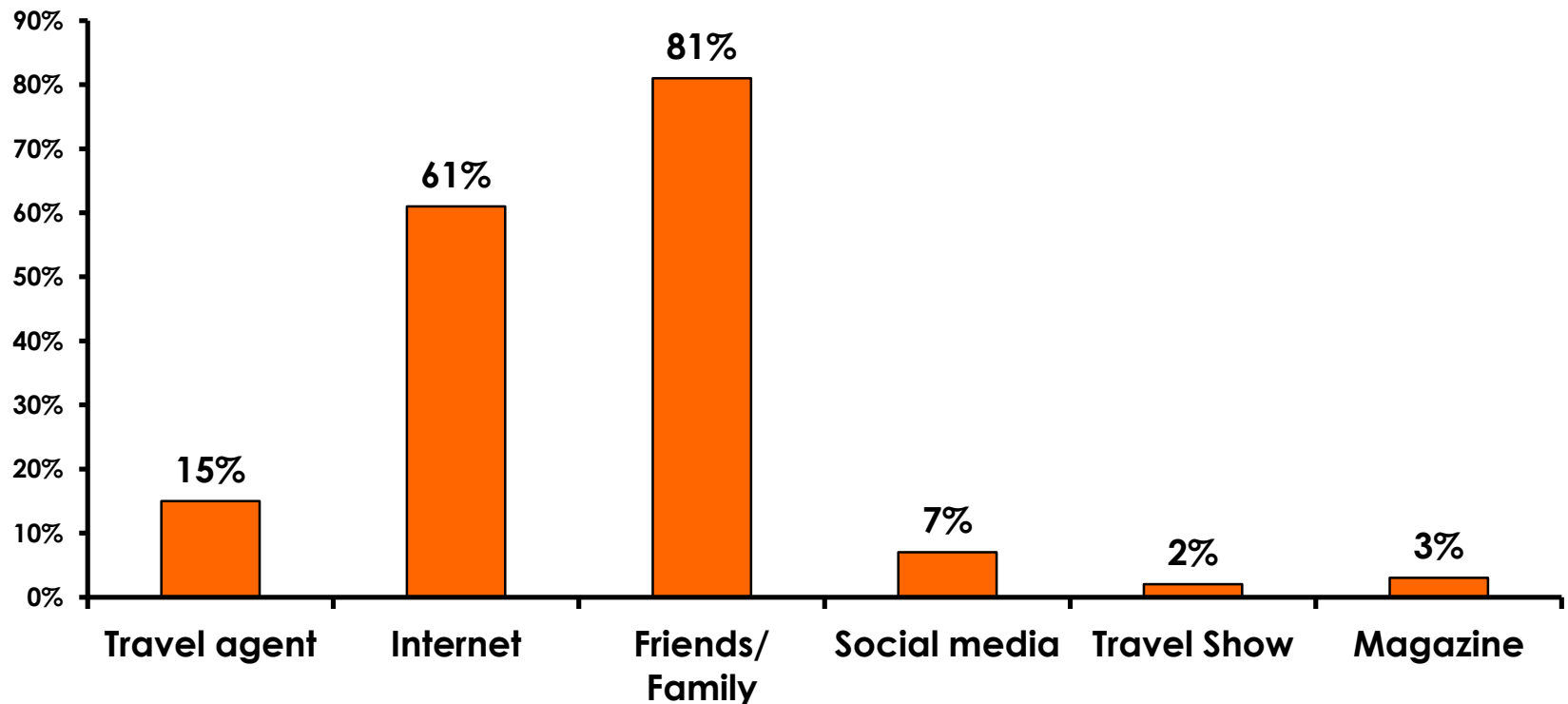




# Internet- GVB Sources

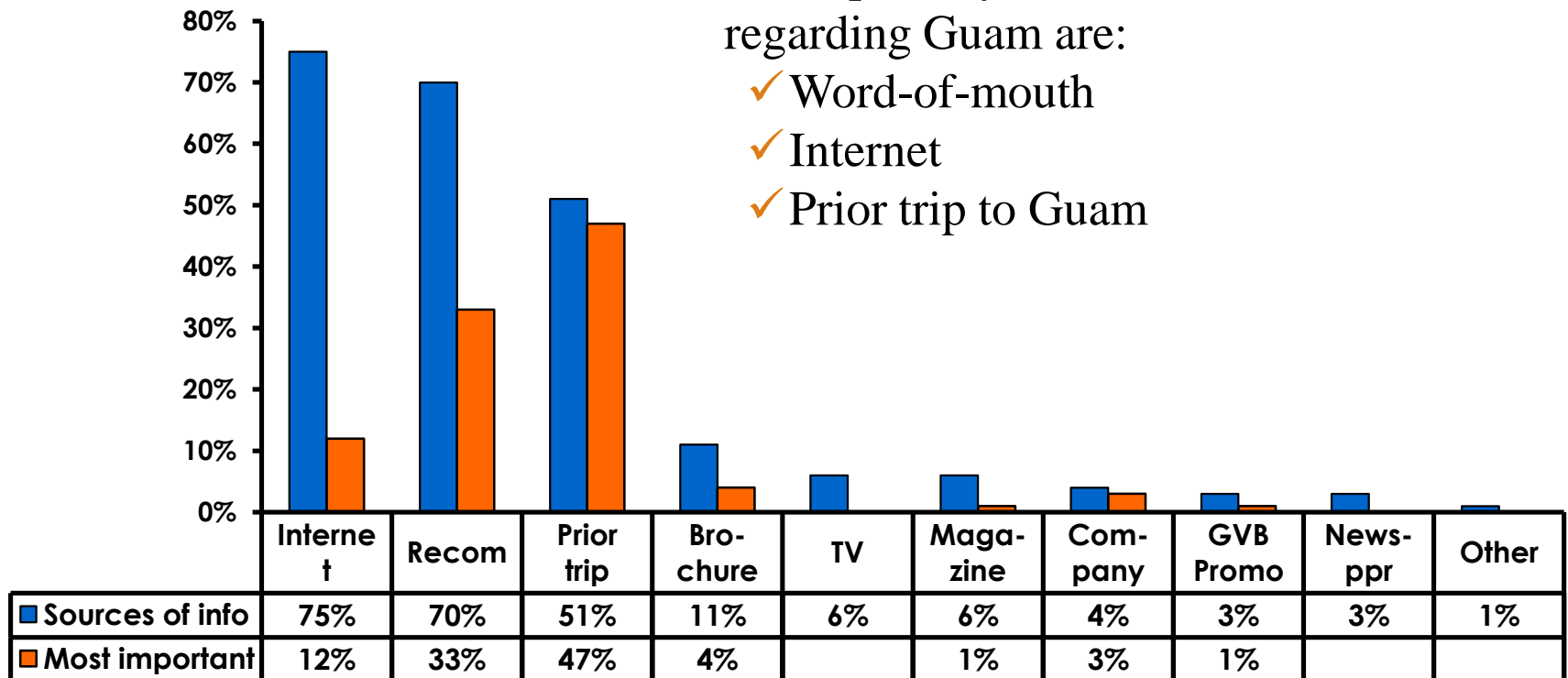


# Travel Motivation- Info Sources



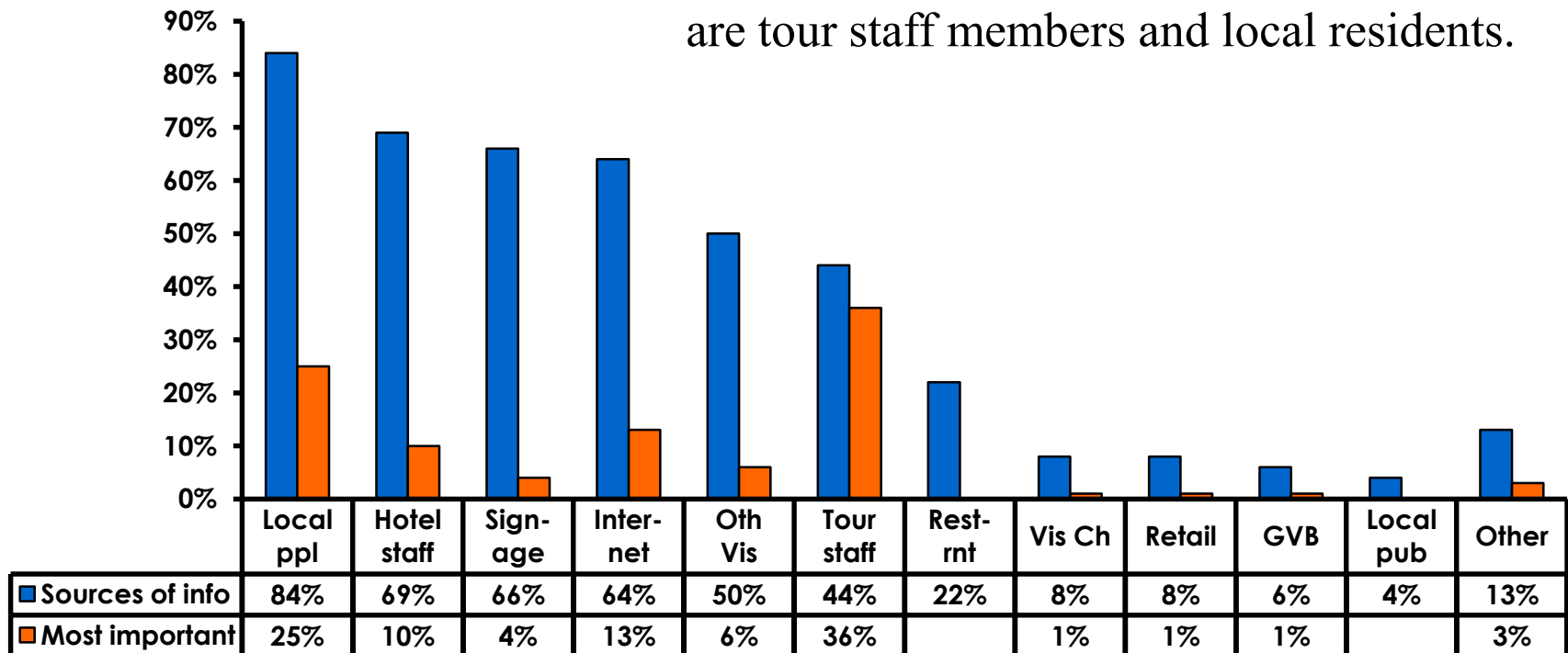
# Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
  - ✓ Word-of-mouth
  - ✓ Internet
  - ✓ Prior trip to Guam



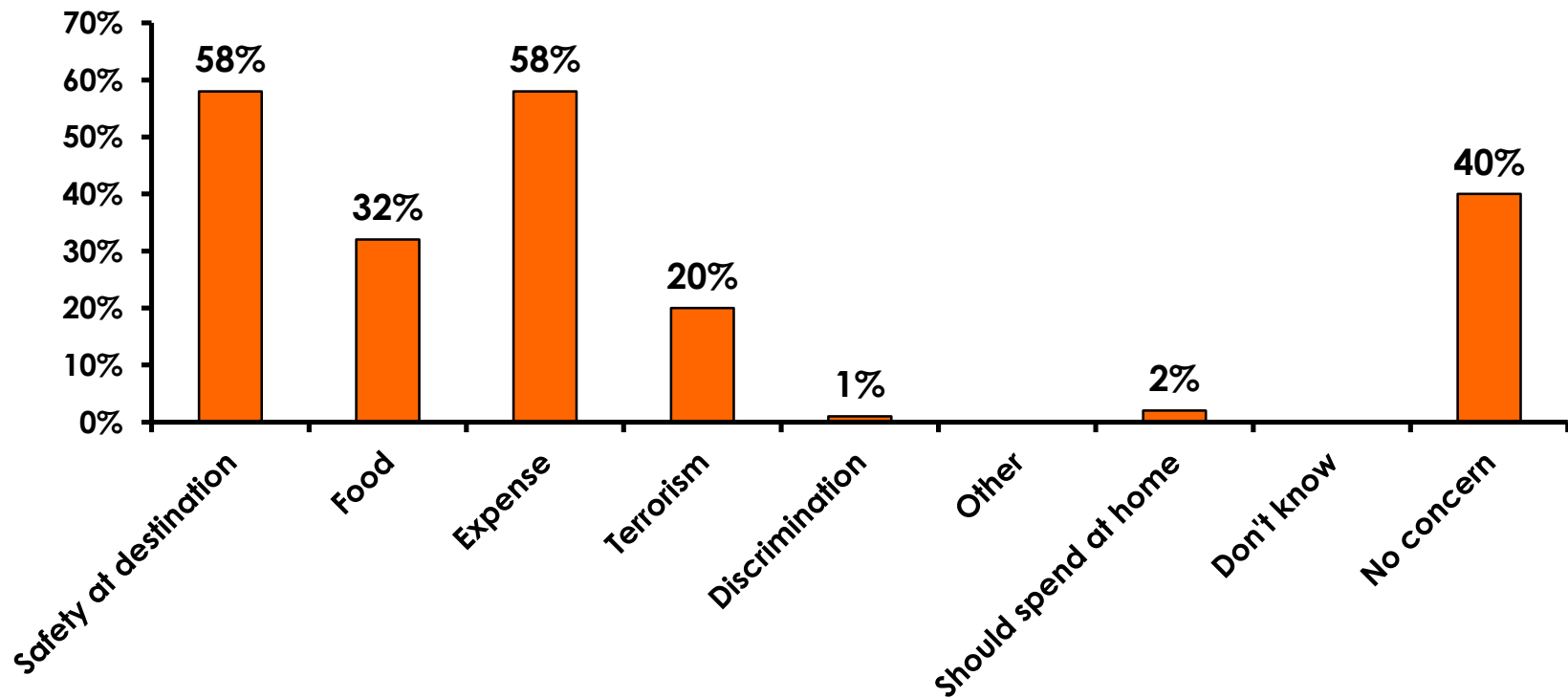
# Sources of Information Post-arrival

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



# SECTION 6 **OTHER ISSUES**

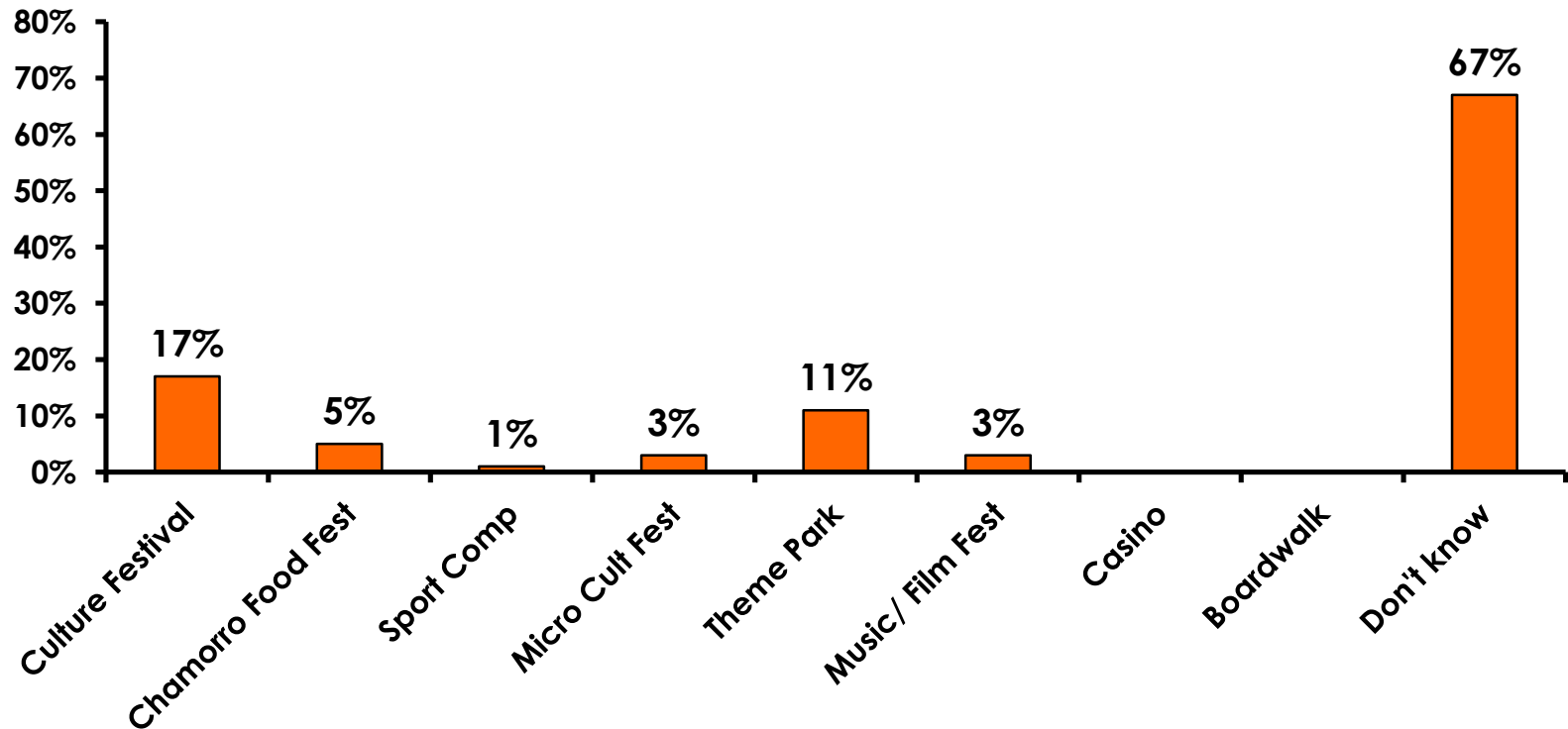
# Concerns about travel outside of Russia - Overall



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

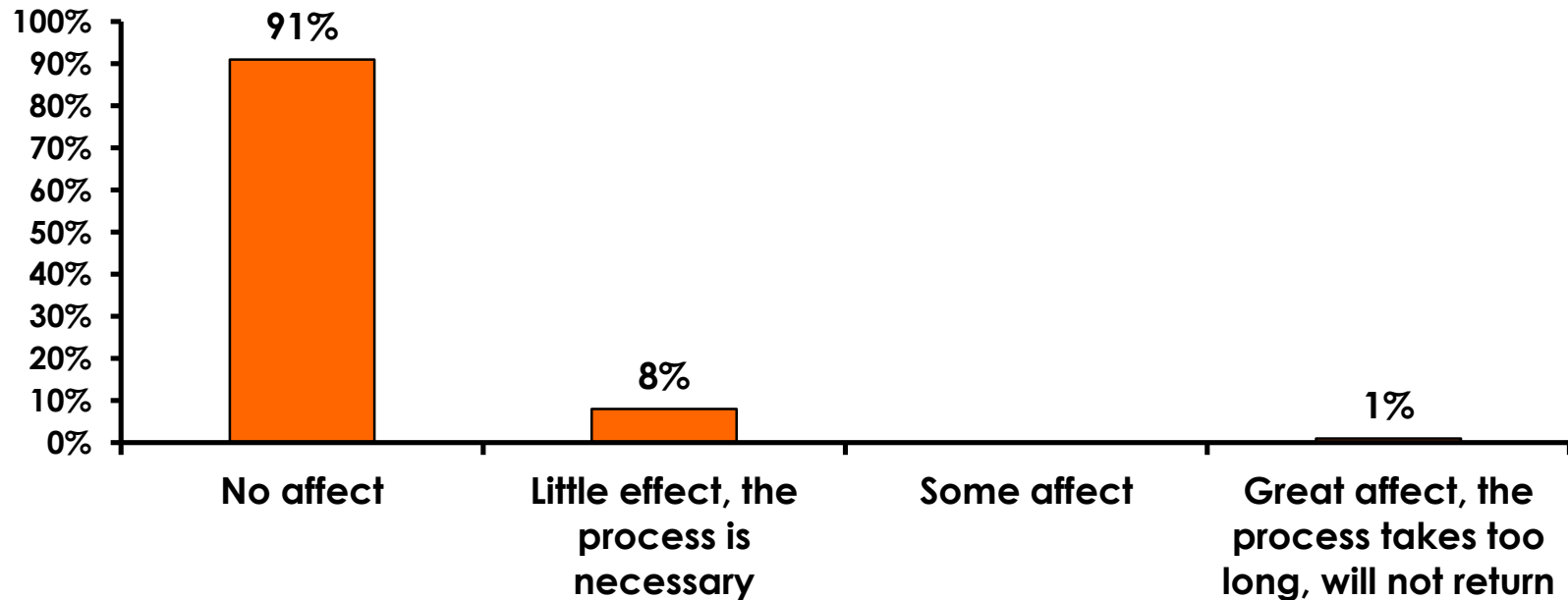
		TOTAL	AGE				Q27							
		-	18-24	25-34	35-49	50+	<732,321	732,321-1,098,481	1,098,482-1,464,642	1,464,643-1,830,803	1,830,803-2,263,124	2,263,124-2,563,125	2,563,125-3,661,606	3,661,607+
Q21	Expense	58%	36%	60%	62%	53%	50%	55%	71%	58%	40%	29%		
	Safety	58%	27%	62%	60%	56%	50%	55%	69%	62%	50%	29%		
	No concerns	40%	64%	38%	36%	44%	50%	43%	29%	38%	50%	71%	100%	
	Food	32%	18%	29%	32%	36%	17%	27%	45%	35%	10%	14%		
	Terrorism	20%	9%	24%	21%	17%	17%	18%	27%	19%	10%	14%		
	Should spend at home	2%		2%	2%	3%			6%					
	Discrimination against Russians	1%			2%							14%		
	Total	Count	149	11	45	53	36	6	44	51	26	10	7	1

# Activities/ Attractions- Appeal





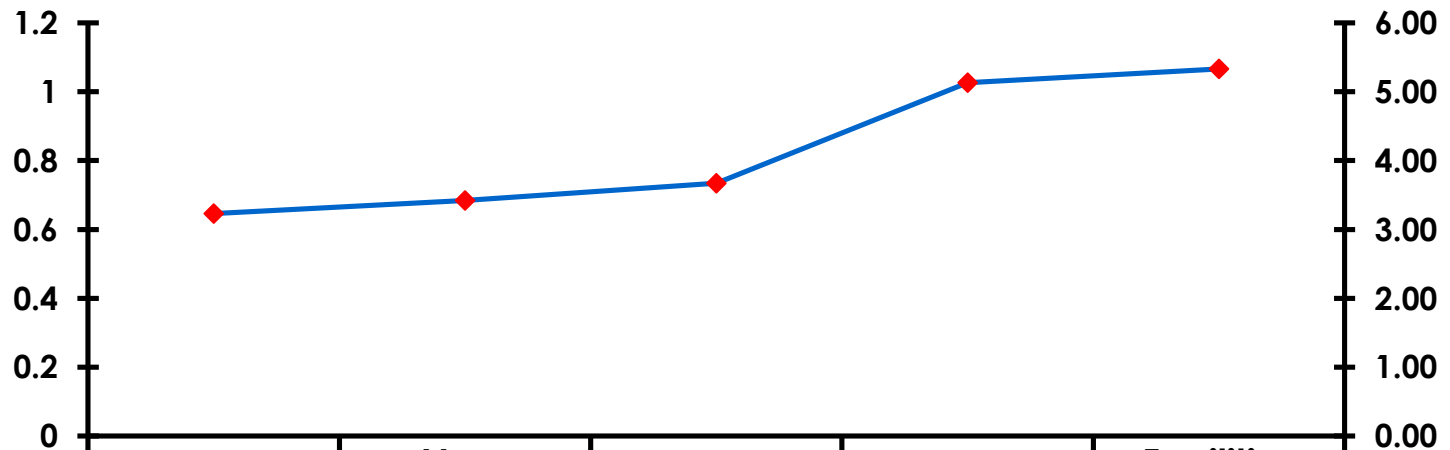
# Security Screening/ Immigration Process at Guam International Airport





# Airport Arrival Experience

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



 Strongly agree					
 MEAN	3.23	3.42	3.67	5.13	5.33