



# **GUAM VISITORS BUREAU**

## **Russia Visitor Tracker Exit Profile**

### **FY2016**

#### **2<sup>ND</sup> QTR. (JAN~MAR 2016)**



**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.

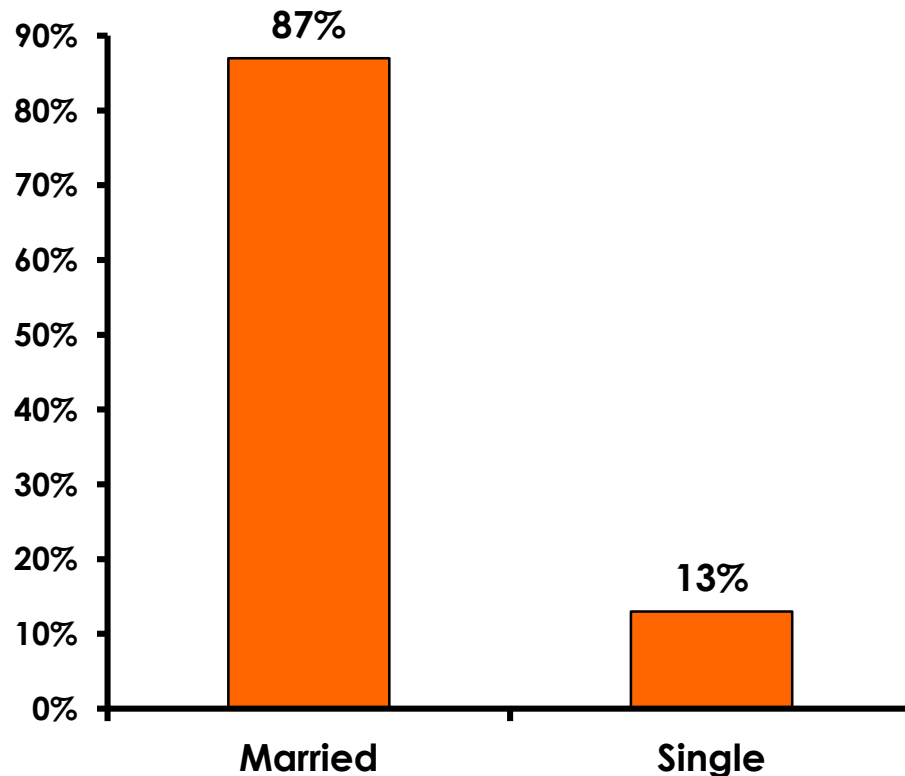
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# OBJECTIVES

- 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.

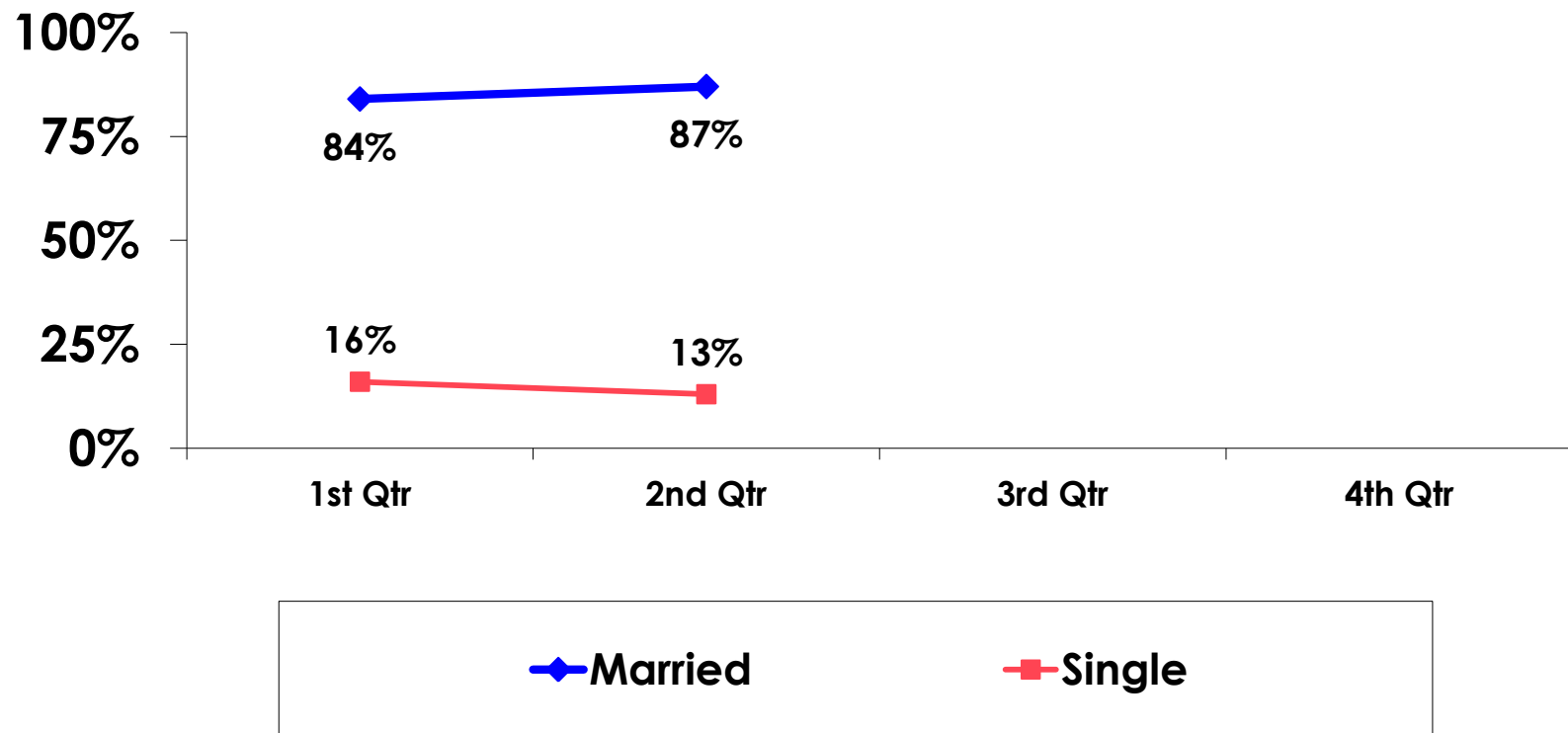
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

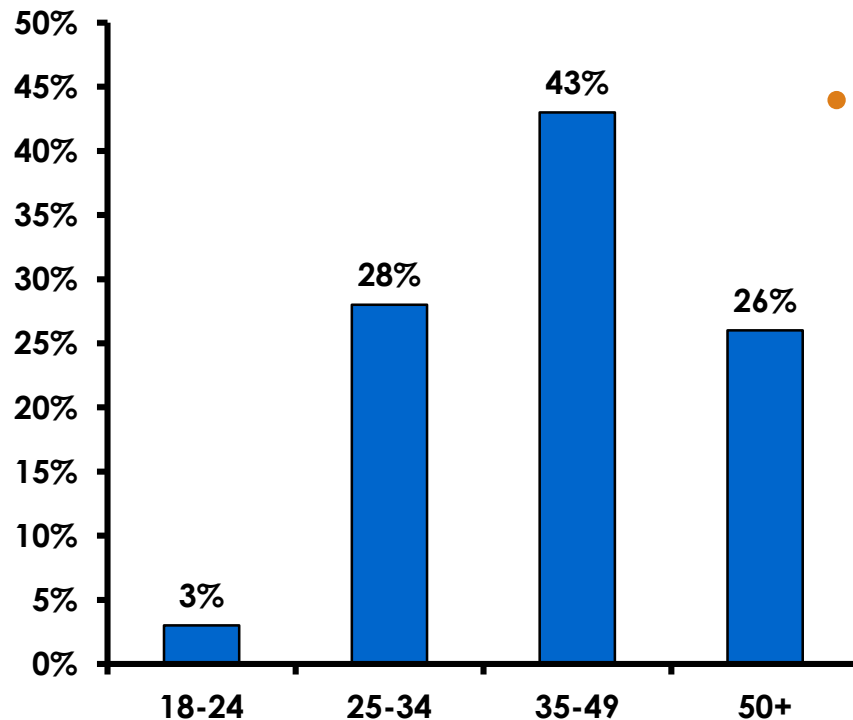


- Majority of Russian visitors are married.

# MARITAL STATUS

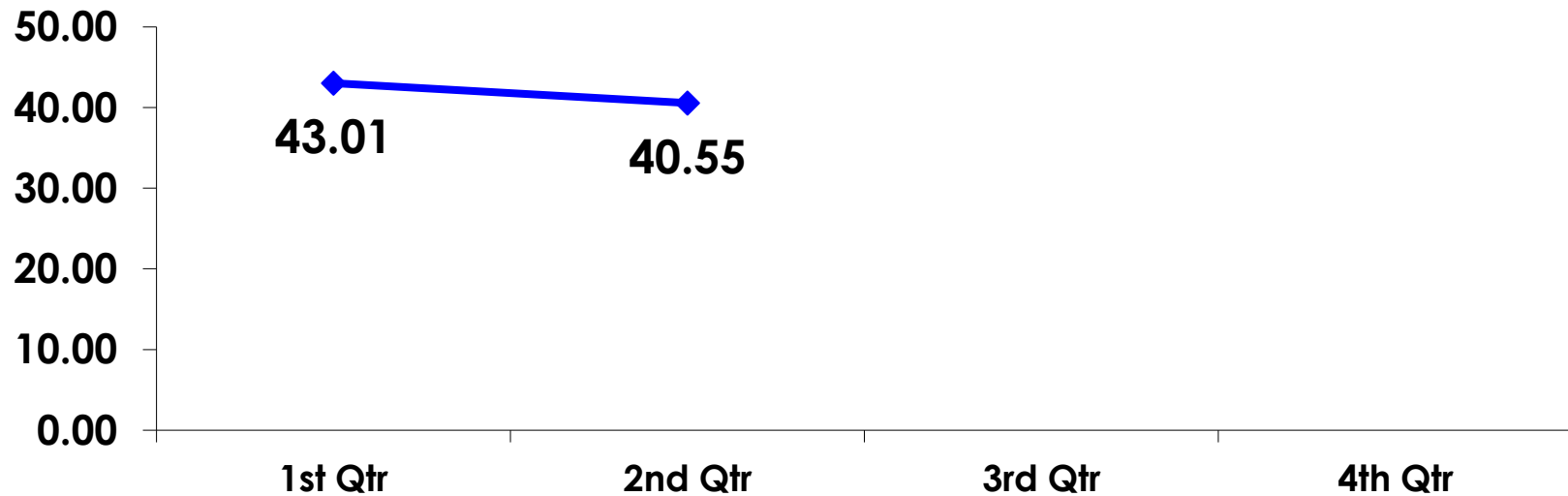


# Age - Overall



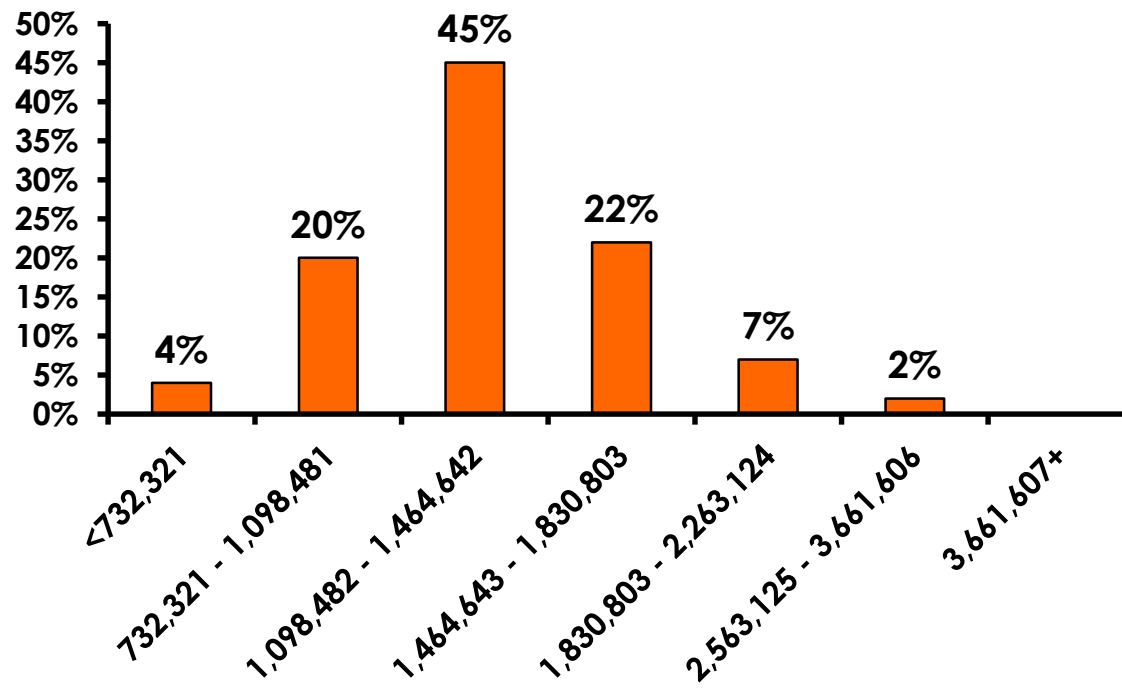
- The average age of the respondents is 40.55 years of age.

# AVERAGE - AGE



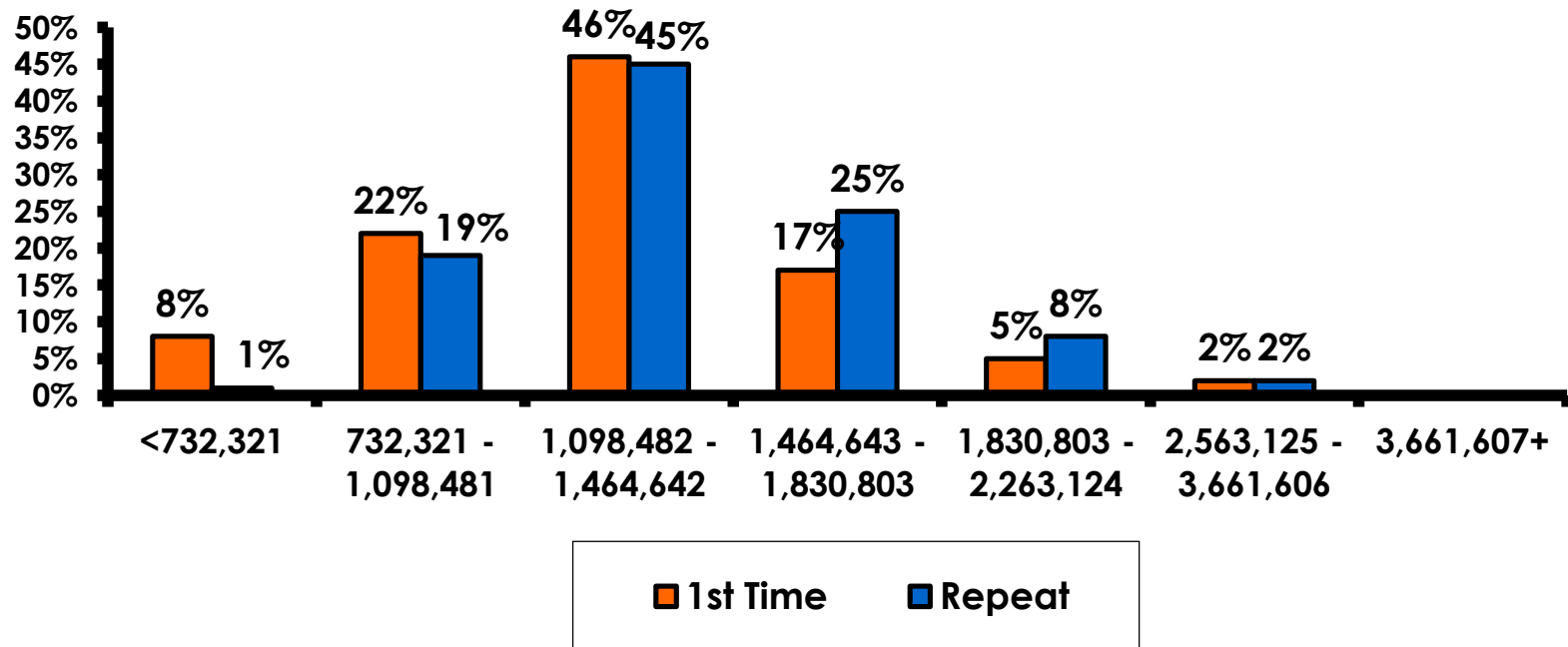


# Personal Income



- Ruble  
74.55=\$1

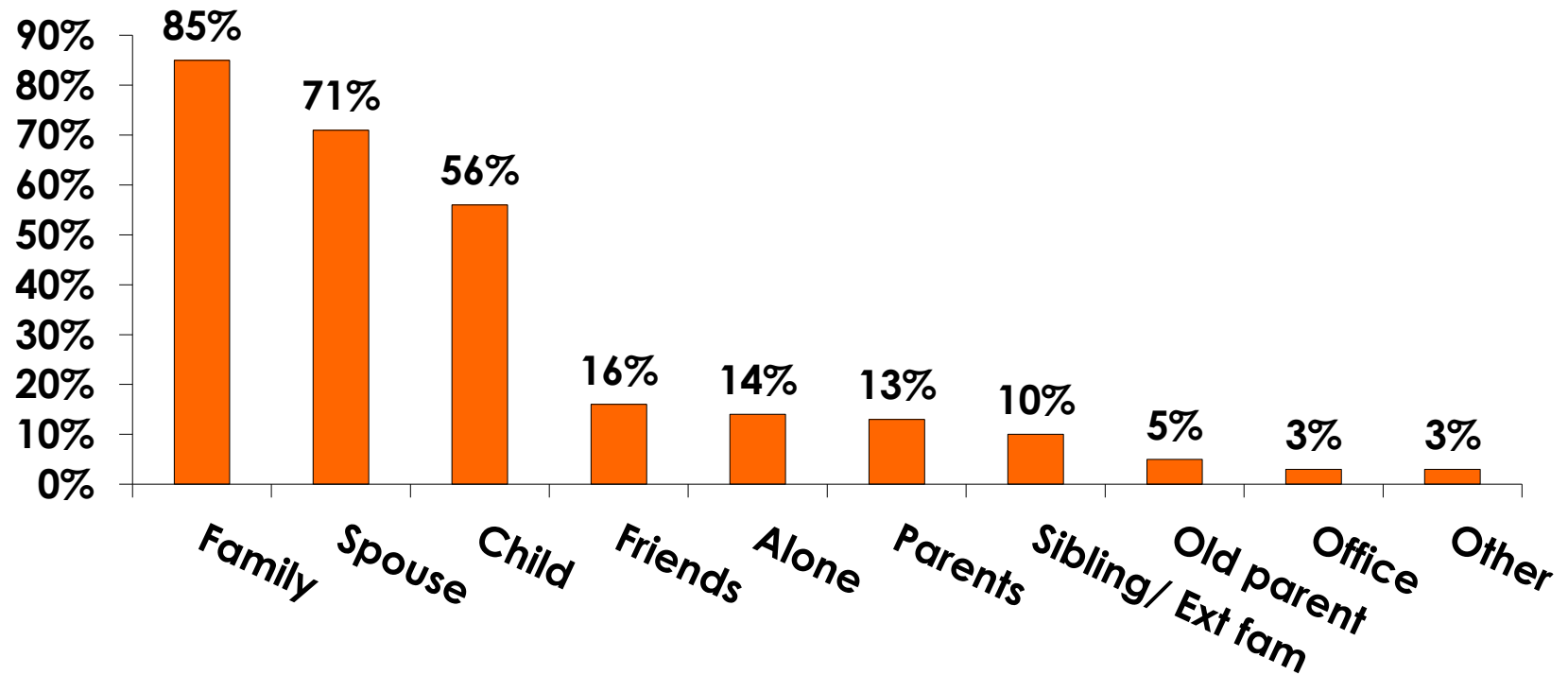
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q27	<732,321	Count	6	1	5	1	2		3
		Column N %	4%	1%	7%	33%	5%		8%
	732,321-1,098,481	Count	30	9	21	1	11	17	1
		Column N %	20%	12%	28%	33%	26%	27%	3%
	1,098,482-1,464,642	Count	67	35	32	1	17	31	16
		Column N %	45%	47%	43%	33%	40%	48%	43%
	1,464,643-1,830,803	Count	32	22	10		8	14	10
		Column N %	22%	30%	14%		19%	22%	27%
	1,830,803-2,263,124	Count	10	5	5		3	2	5
		Column N %	7%	7%	7%		7%	3%	14%
	2,563,125-3,661,606	Count	3	2	1		1		2
		Column N %	2%	3%	1%		2%		5%
	Total	Count	148	74	74	3	42	64	37

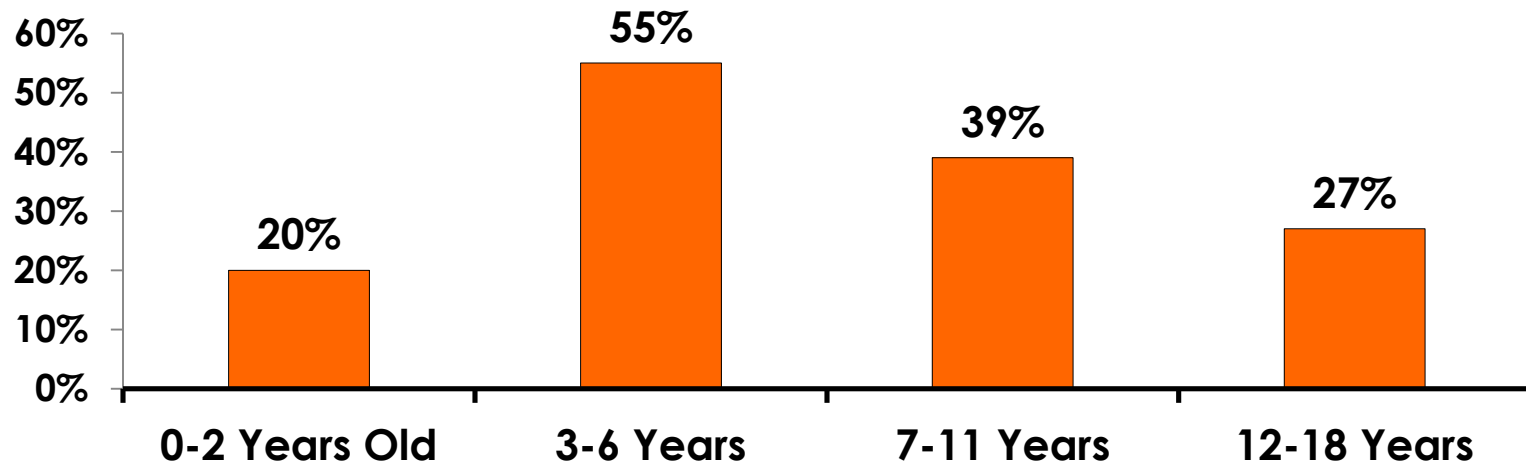
# Travel Companions



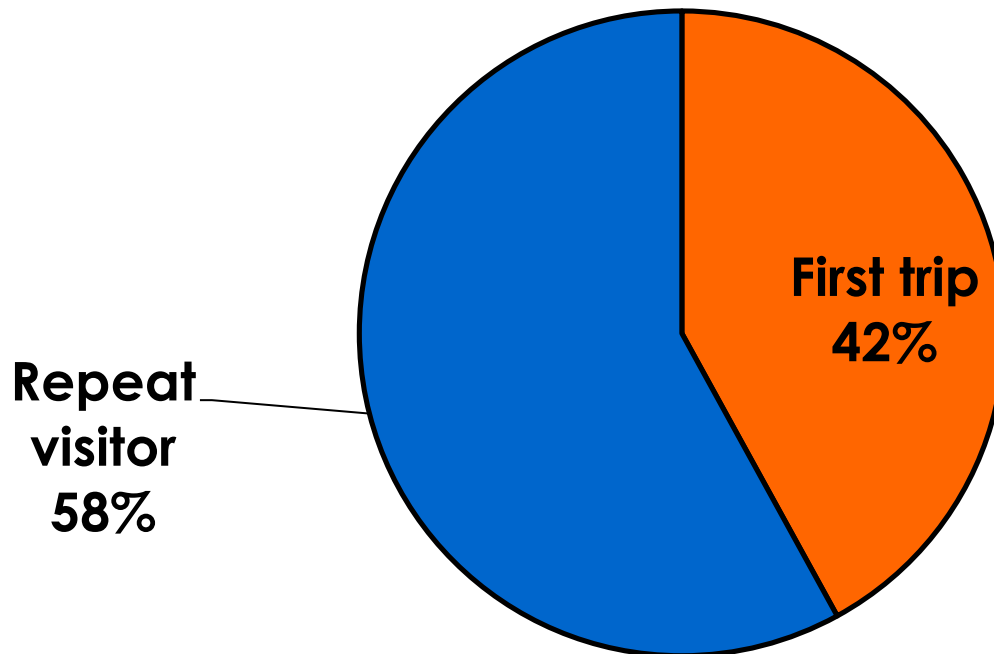
# Number of Children Travel Party

N=85 total respondents traveling with children.

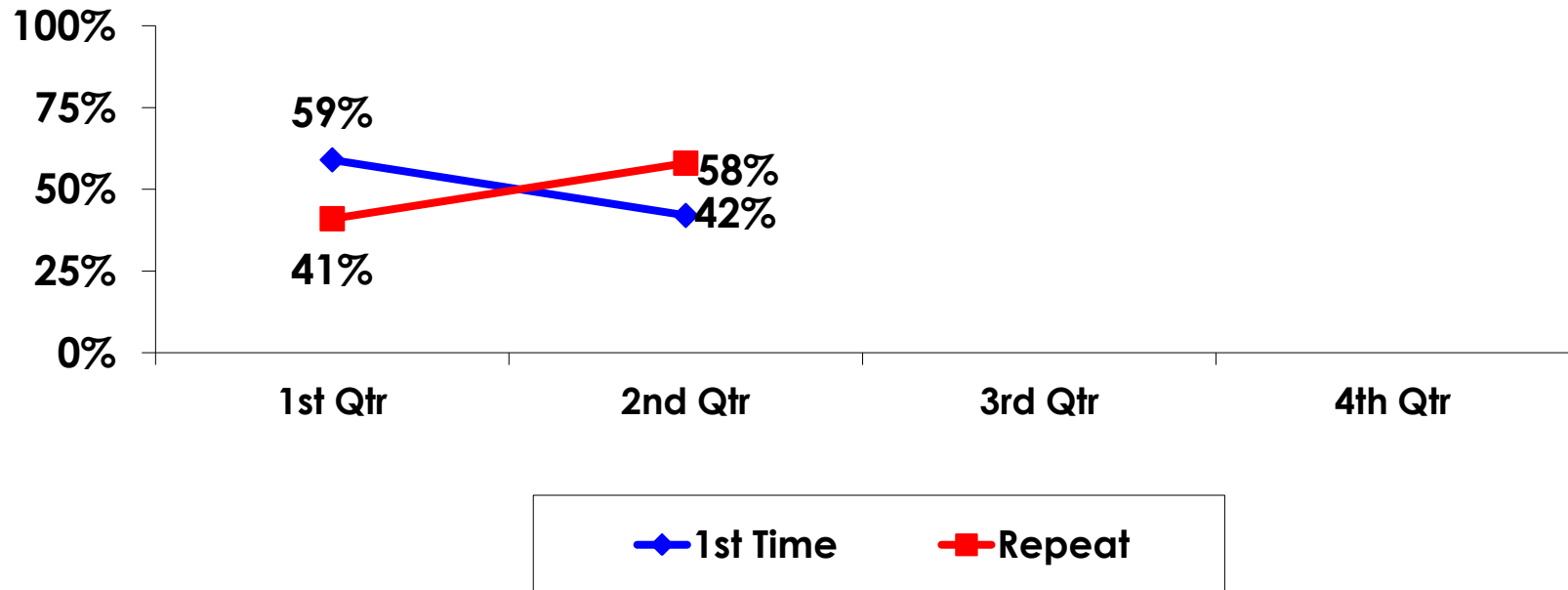
(Of those N=85 respondents, there is a total of 123 children 18 years or younger)



# Prior Trips to Guam



# PRIOR TRIPS TO GUAM



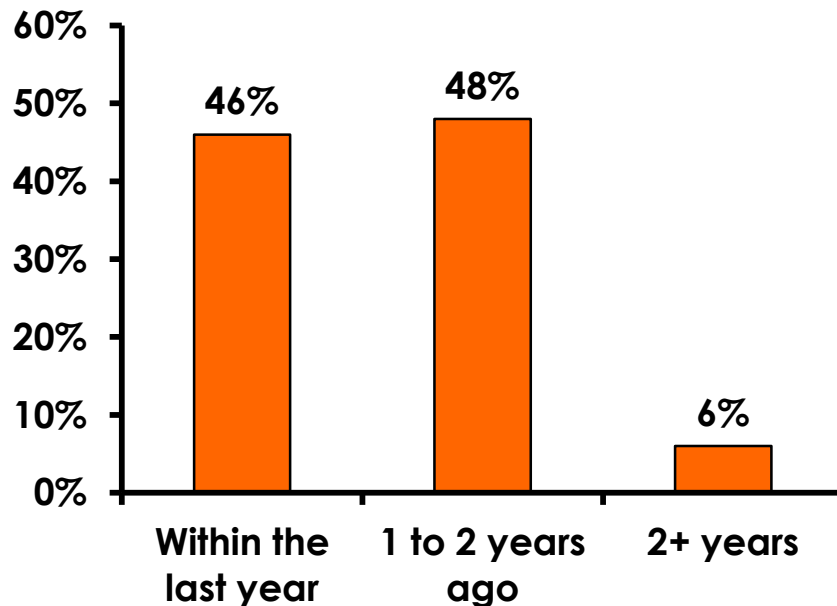
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	76	28	48	
		Column N %	50%	44%	55%	
	Female	Count	75	36	39	
		Column N %	50%	56%	45%	
	Total	Count	151	64	87	
AGE	18-24	Count	5	4	1	
		Column N %	3%	6%	1%	
	25-34	Count	42	17	25	
		Column N %	28%	27%	29%	
	35-49	Count	64	27	37	
		Column N %	43%	44%	43%	
	50+	Count	38	14	24	
		Column N %	26%	23%	28%	
		Total	Count	149	62	87



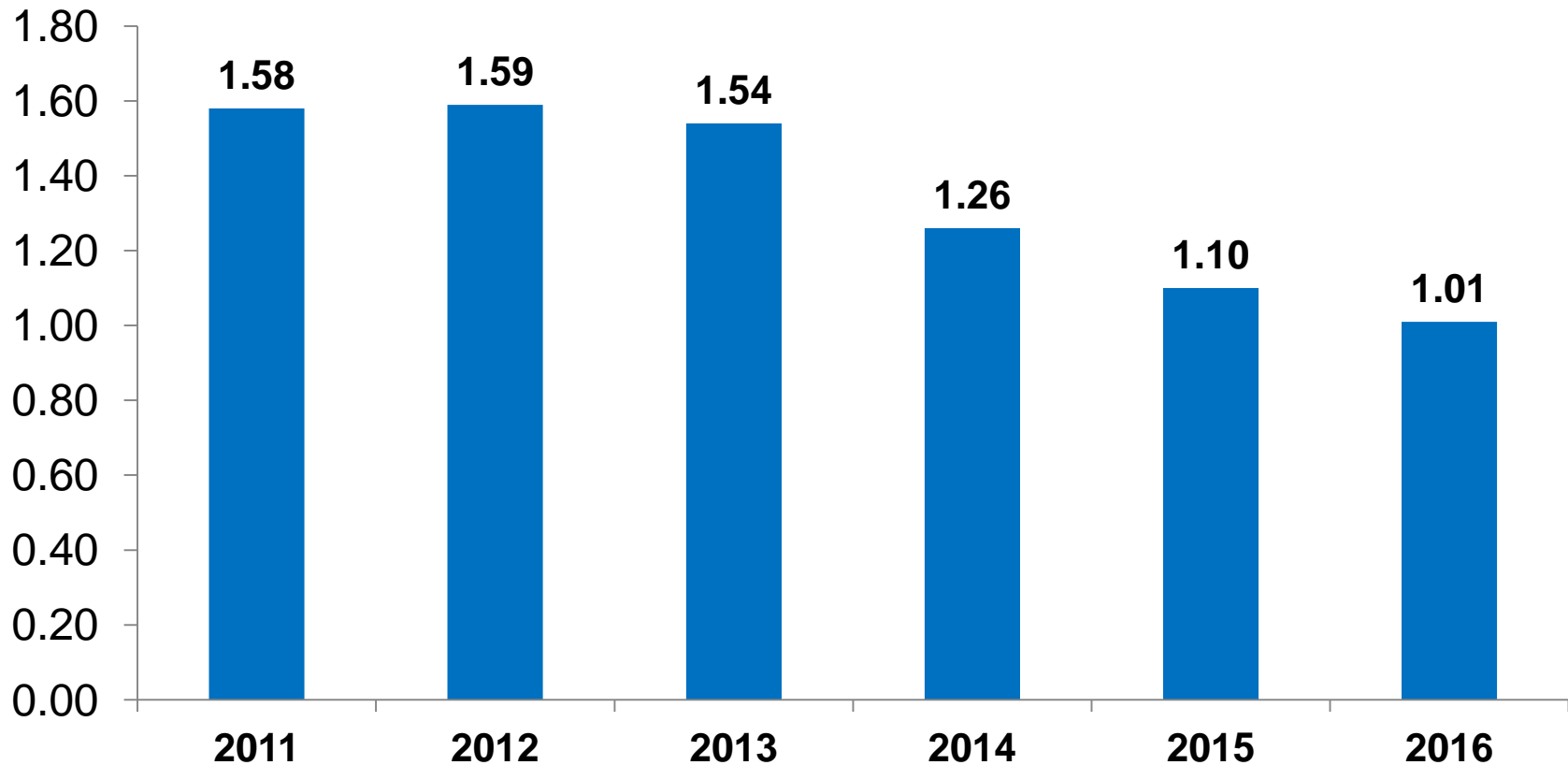
# Repeat Visitors Last Trip

n = 85



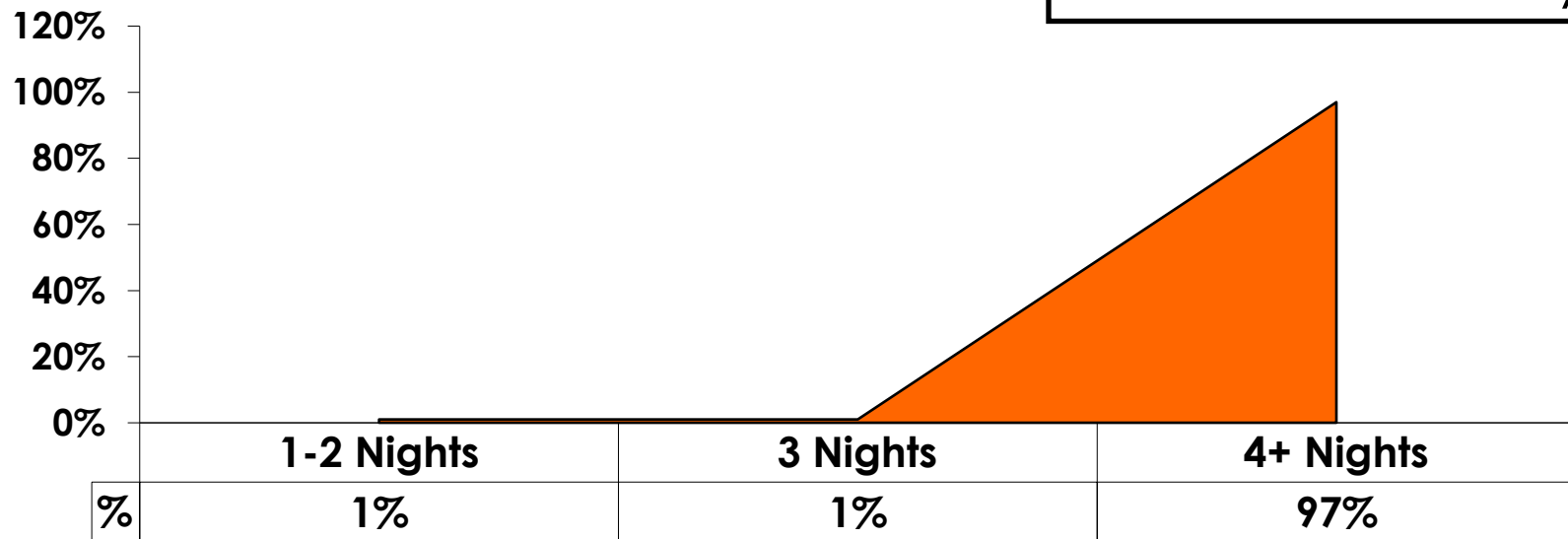
- The average repeat visitor has been to Guam 1.78 times.
- A majority of the repeat visitors have been to Guam within the last two years.

# Average Number Overnight Trips (2011-2016) (2 nights or more)

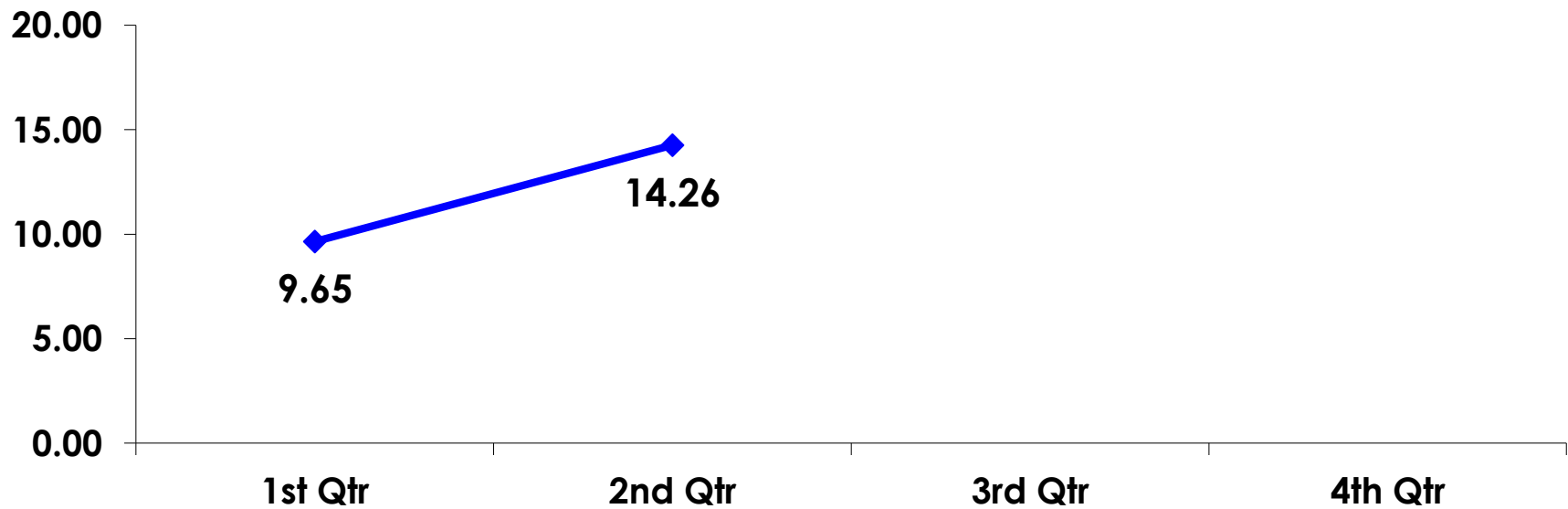


# Length of Stay

Mean = 14.26 Days  
Median = 14 Days



# AVG LENGTH OF STAY

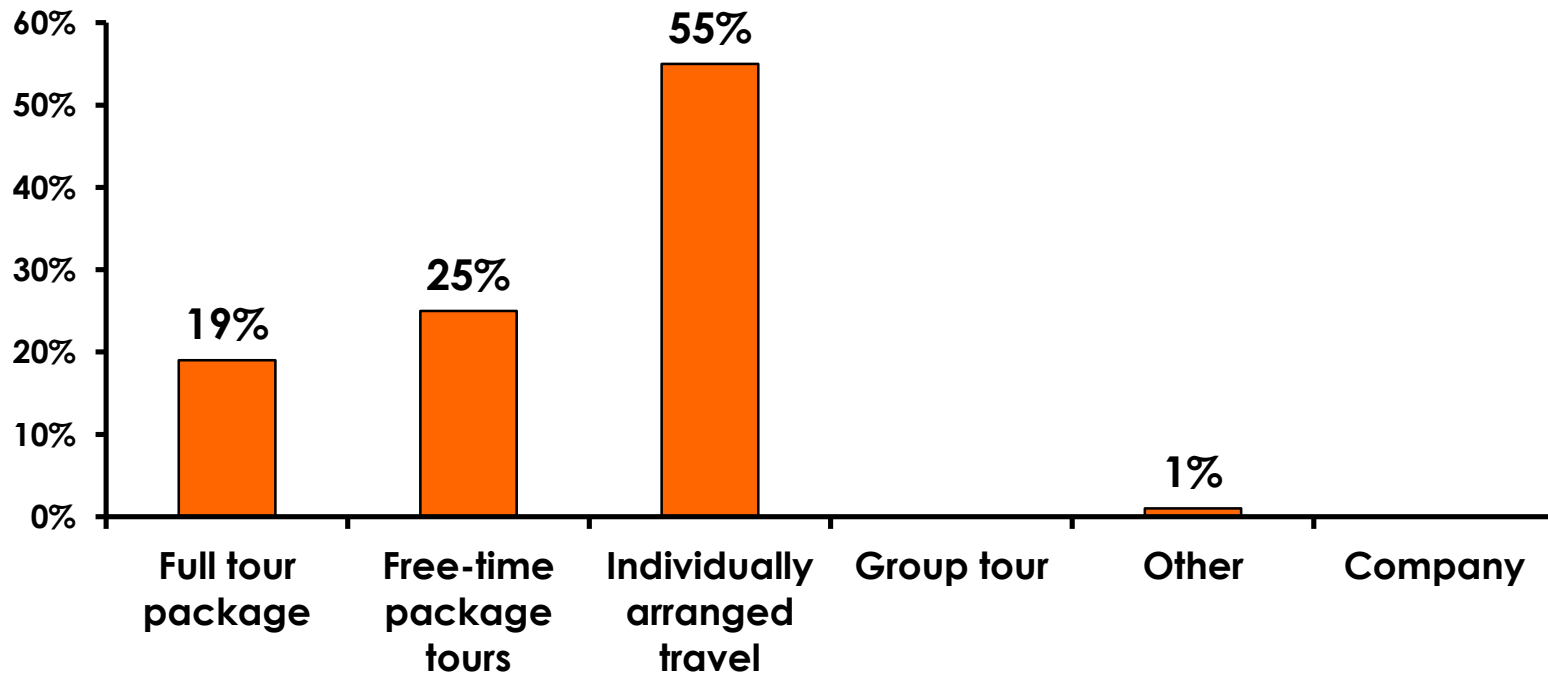


# Occupation by Income

		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	40%		13%	43%	63%	40%	100%		
	Professional/ Specialist	17%		30%	24%					
	Company: Office/ Non-Mgr	11%	17%	20%	6%	9%	10%			
	Company: Exec	8%			7%	16%	20%			
	Company: Manager	7%		13%	10%					
	Homemaker	6%		10%	1%	9%	20%			
	Retired	3%	50%	3%						
	Company: Engineer	3%		3%	4%					
	Student	2%	33%							
	Teacher	2%		3%	3%					
	Other	1%				3%				
	Skilled worker	1%		3%						
	Company: Salesperson	1%					10%			
	Total	Count	151	6	30	67	32	10	3	

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



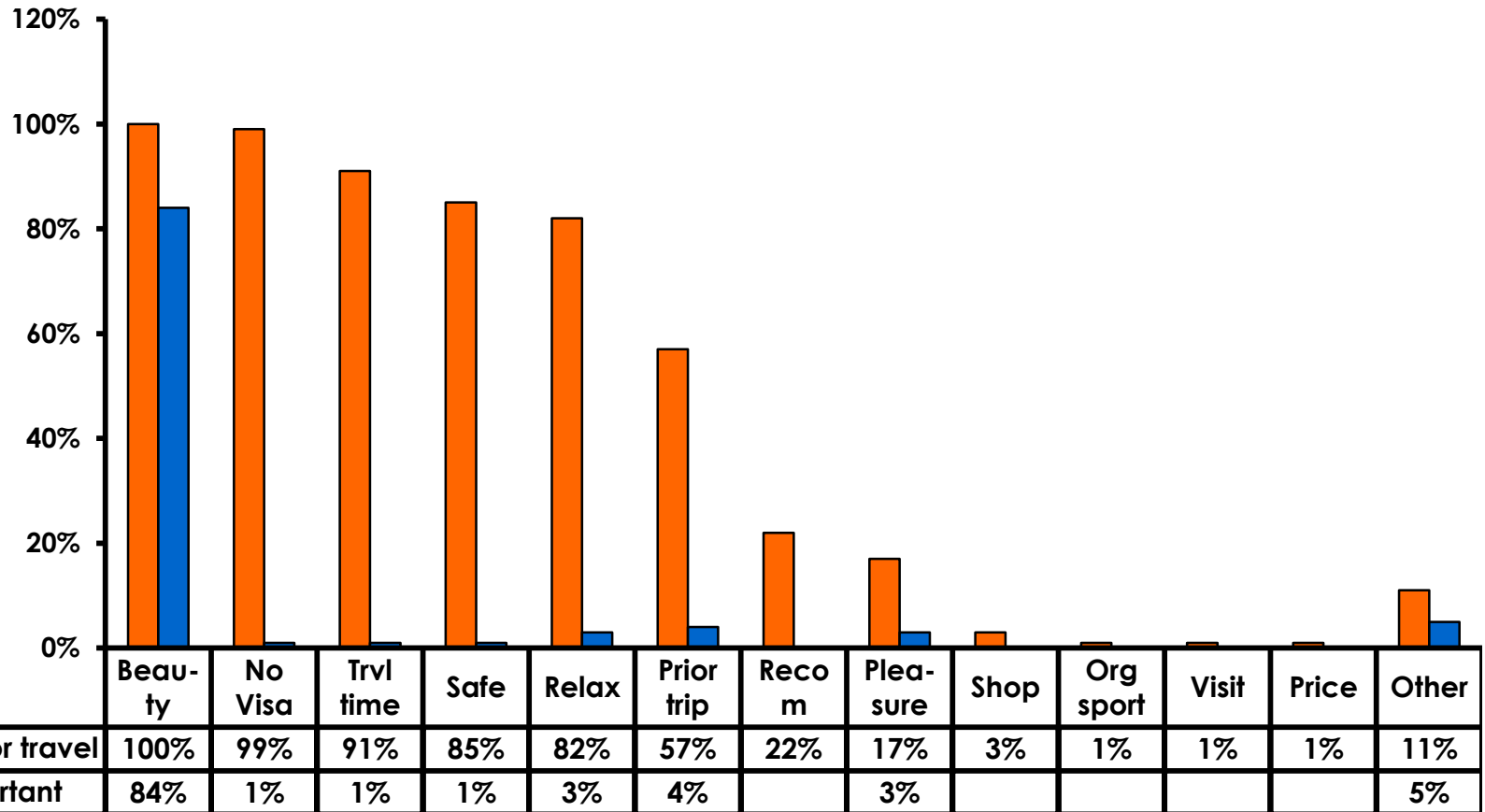
# Accommodation by Income

Average length of stay: 14.26 days

	TOTAL	Q27								
		-	<732,321	732,321-1,098,481	1,098,482-1,464,642	1,464,643-1,830,803	1,830,803-2,263,124	2,563,125-3,661,606	3,661,607+	No Income
Q9										
Bayview Hotel	17%	17%	30%	12%	9%	30%				
Westin Resort Guam	15%	17%	7%	16%	19%	20%	33%			
Hilton Guam Resort	13%		10%	9%	25%					
PIC Club	13%	17%		22%	9%					
Fiesta Resort Guam	11%		20%	13%	6%					
Tumon Bay Capital Hotel	7%		7%	7%	3%	20%				
Lotte Hotel Guam	5%		3%	6%	6%					
Guam Reef & Olive Spa	4%	17%	7%	3%		10%				
Hyatt Regency Guam	4%			3%	13%					
Dusit Thani Guam	3%					20%	67%			
Apartment	2%		3%	1%	3%					
Condo	2%	17%		1%	3%					
Onward Beach Resort	1%	17%		1%						
Pacific Bay Hotel	1%		3%	1%						
Outrigger Guam Resort	1%		3%		3%					
Other	1%			1%						
Oceanview Hotel	1%		3%							
Pacific Star Resort & Spa	1%		3%							
Total	Count	151	6	30	67	32	10	3		



# Travel Motivation - Top Responses



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# Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches
- Previous trip
- Pleasure

are the primary reasons for visiting during this period.

# Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty	100%	100%	100%	100%	100%	100%	100%	
	No Visa required	99%	100%	100%	98%	97%	100%	97%	
	Short travel time	91%	100%	93%	91%	87%	89%	92%	
	Safe	85%	80%	79%	88%	89%	91%	80%	
	Relax	82%	80%	81%	83%	87%	83%	81%	
	Previous trip	57%	20%	57%	58%	63%	63%	51%	
	Recomm- friend/family/trvl agnt	22%	20%	21%	20%	26%	22%	21%	
	Pleasure	17%		17%	16%	18%	18%	15%	
	Other	11%		14%	6%	16%	11%	11%	
	Shopping	3%		5%	5%		3%	4%	
	Organized sports	1%			2%			1%	
	Visit friends/ Relatives	1%		2%				1%	
	Price	1%			2%			1%	
	Total	Count	151	5	42	64	38	76	75

# 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	Natural beauty	100%	100%	100%	100%	100%	100%	100%		
	No Visa required	99%	100%	100%	99%	100%	90%	100%		
	Short travel time	91%	83%	97%	90%	91%	90%	67%		
	Safe	85%	67%	67%	94%	84%	90%	100%		
	Relax	82%	50%	83%	76%	94%	90%	100%		
	Previous trip	57%	17%	53%	55%	66%	70%	67%		
	Recomm- friend/family/trvl agnt	22%	33%	27%	21%	19%	10%	33%		
	Pleasure	17%	17%	13%	21%	13%	10%			
	Other	11%	33%	7%	7%	13%	30%			
	Shopping	3%		7%		9%				
	Organized sports	1%		3%						
	Visit friends/ Relatives	1%					10%			
	Price	1%		3%						
	Total	Count	151	6	30	67	32	10	3	

# SECTION 3 **EXPENDITURES**

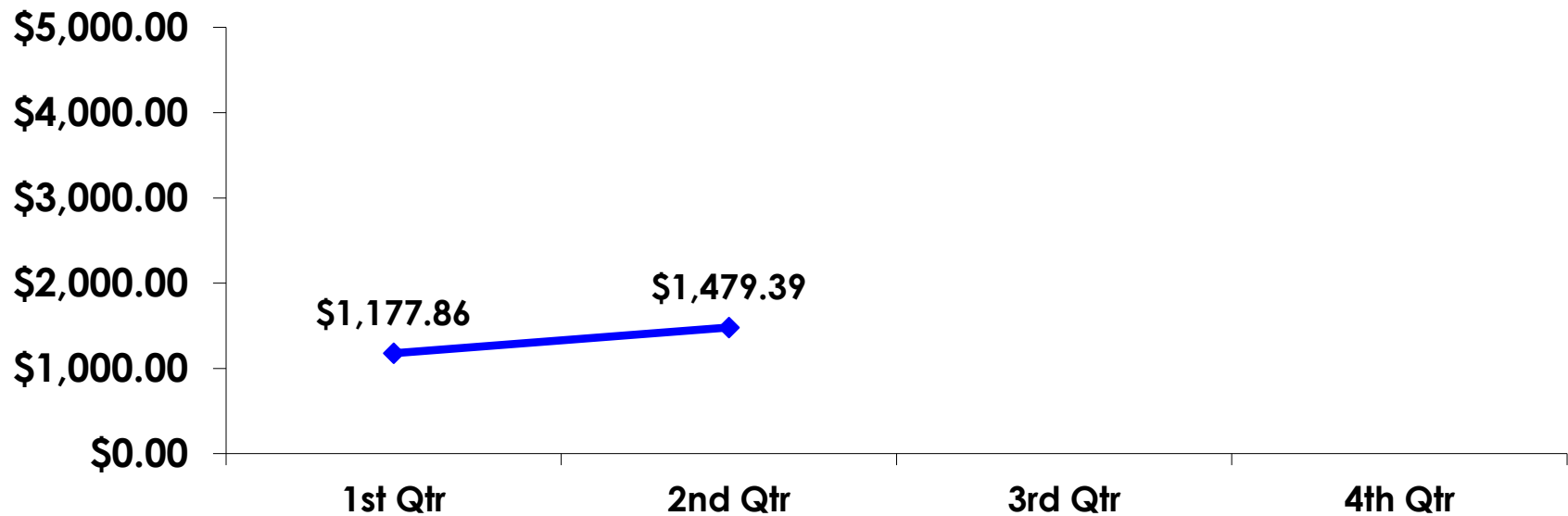
# Prepaid Expenditures

Ruble 74.55 /US\$1

- \$3,868.40 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$12,743 = maximum (highest amount recorded for the entire sample)
- \$1,479.39 = overall mean average per person prepaid expenditures

# PREPAID EXPENDITURES

## Per Person



YTD=\$1,329.13

# Breakdown of Prepaid Expenditures

## Rub 74.55=\$1

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

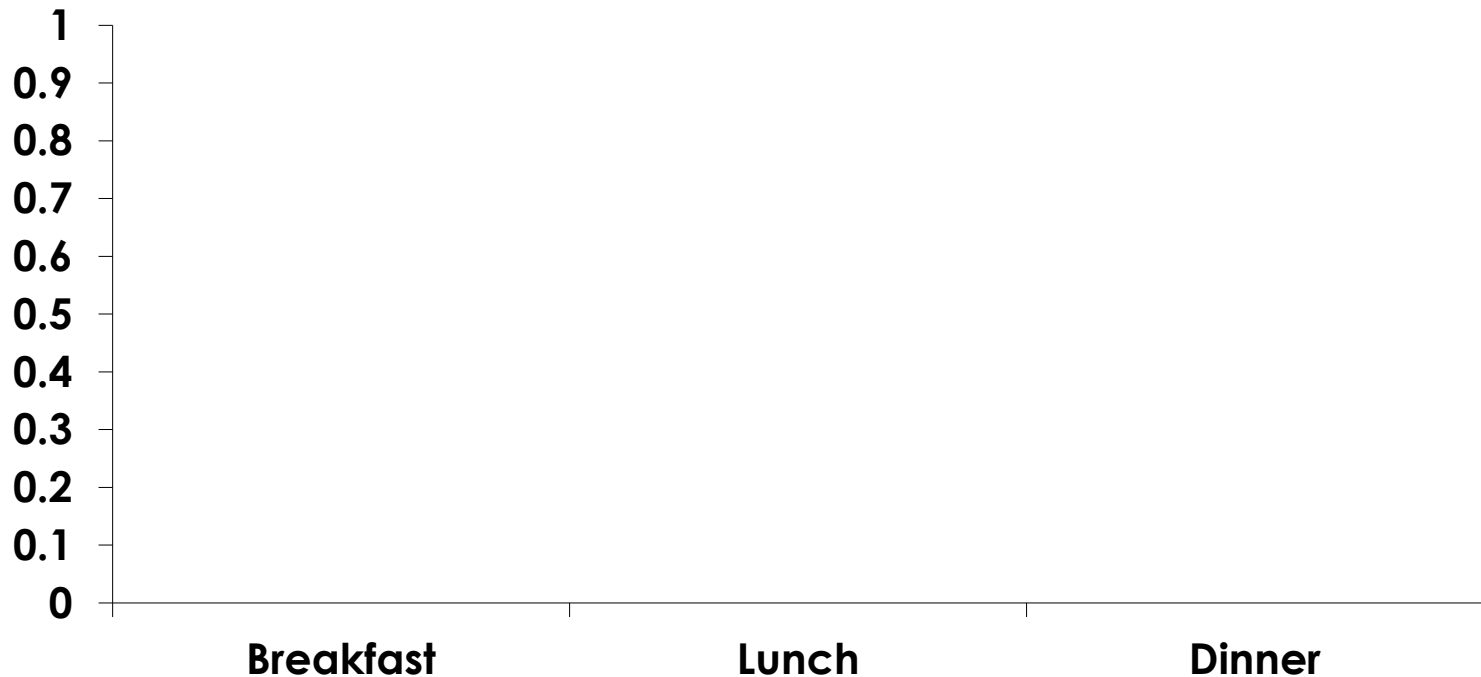
	MEAN \$
Air & Accommodation package only	\$3,565.19
Air & Accommodation w/ daily meal package	\$5,421.49
Air only	\$2,912.10
Accommodation only	\$2,929.60
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation – Russia	\$-
Ground transportation – Guam	\$-
Optional tours/ activities	\$-
Other expenses	\$-
<b>Total Prepaid</b>	<b>\$3,868.40</b>



# PREPAID MEAL BREAKDOWN

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

**n= X (none recorded)**

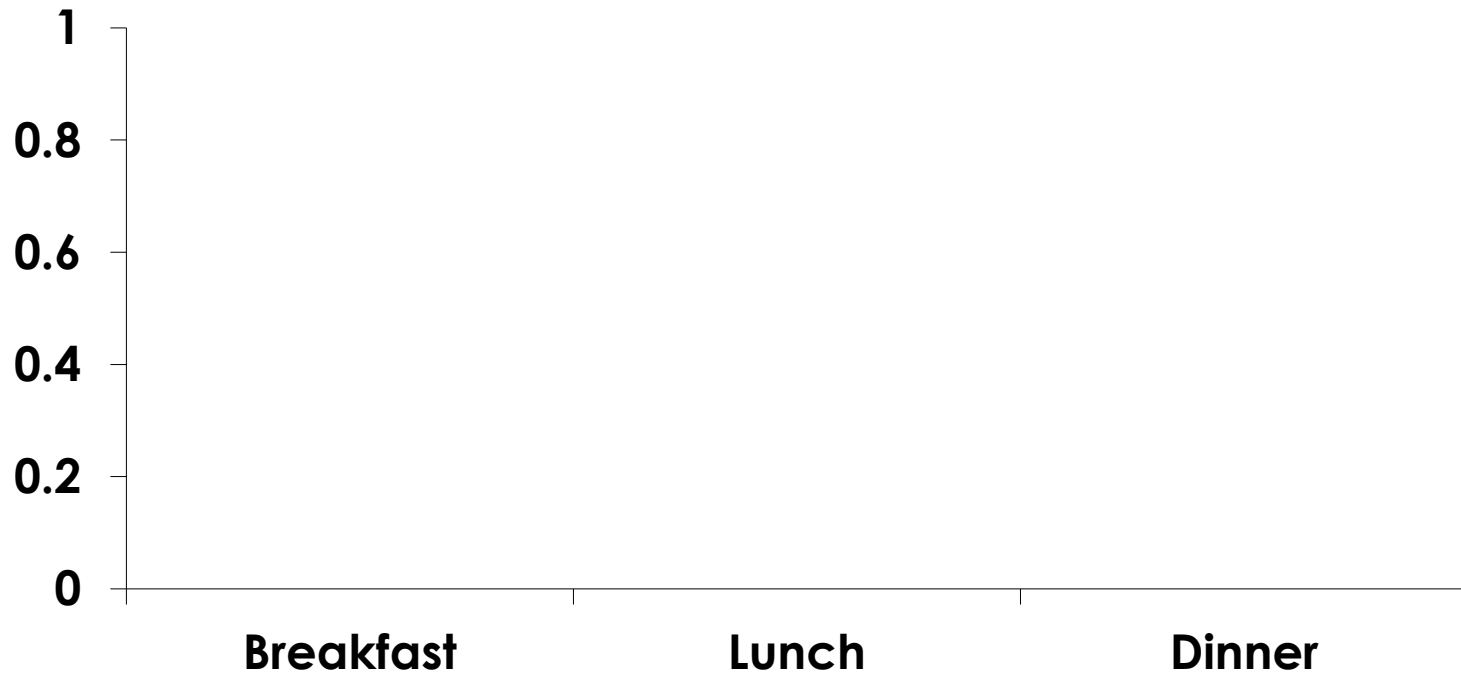


**Mean=\$5,421.49 per travel party**

# PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

n=X



Mean=\$xxx per travel party

# PREPAID GROUND TRANSPORTATION

**n=x**



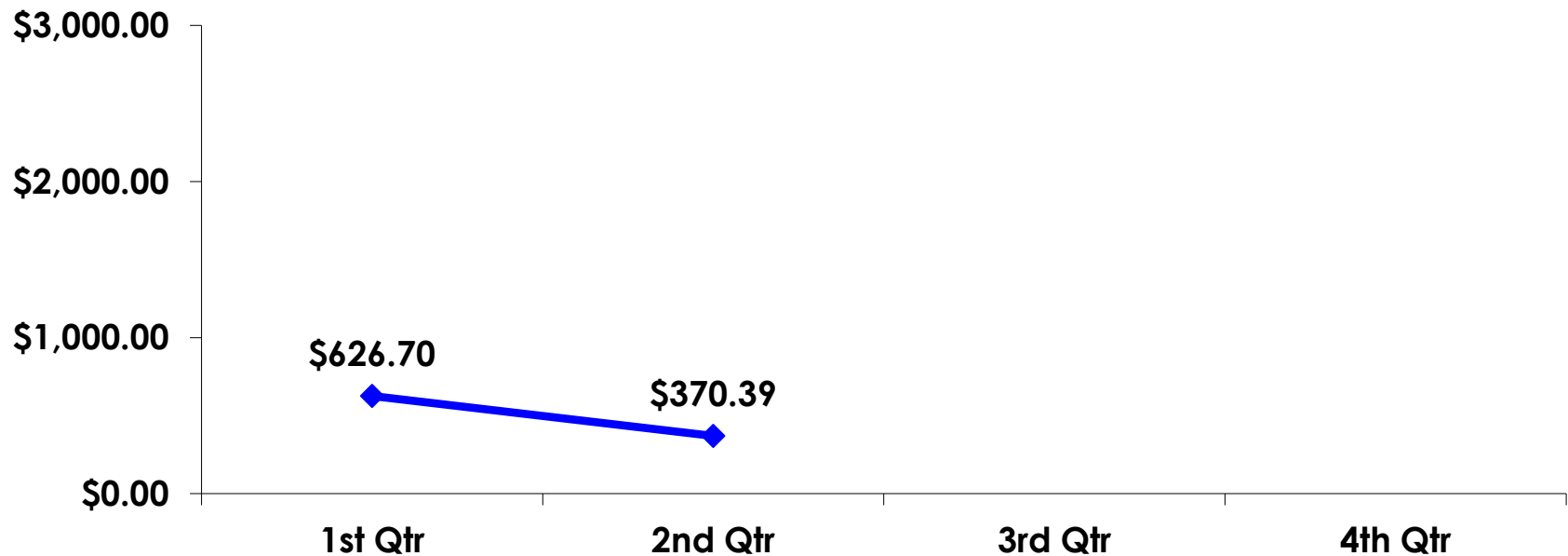
**Mean=\$xxx per travel party**

# On-Island Expenditures

- \$855.21 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,300 = Maximum (highest amount recorded for the entire sample)
- \$370.39 = overall mean average per person on-island expenditure

# ON-ISLAND EXPENDITURES

## Per Person



YTD = \$498.12

# 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	\$370.39	\$352.22	\$388.80	\$250.00	\$312.14	\$342.61	\$392.57	\$447.50	\$315.57	\$362.10	\$687.96
	Median	\$300	\$300	\$300	\$250	\$253	\$333	\$350	\$430	\$256	\$297	\$625
	Minimum	\$0	\$75	\$0	\$250	\$125	\$147	\$75	\$250	\$0	\$66	\$200
	Maximum	\$1,500	\$950	\$1,500	\$250	\$767	\$650	\$950	\$680	\$900	\$1,010	\$1,500

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$112.44	\$100.32	\$124.73	\$32.00	\$93.45	\$108.33	\$149.50
	Median	\$60	\$60	\$60	\$50	\$60	\$60	\$90
F&B FF/STORE	Mean	\$87.23	\$85.16	\$89.33	\$34.00	\$80.60	\$100.58	\$77.89
	Median	\$75	\$75	\$80	\$0	\$75	\$100	\$70
F&B RESTRNT	Mean	\$121.56	\$132.30	\$110.67	\$80.00	\$105.83	\$137.81	\$117.37
	Median	\$100	\$120	\$80	\$0	\$80	\$120	\$75
OPT TOUR	Mean	\$91.79	\$114.21	\$69.07	\$42.00	\$72.38	\$115.31	\$78.42
	Median	\$60	\$80	\$60	\$50	\$60	\$70	\$0
GIFT- SELF	Mean	\$196.16	\$212.50	\$179.60	\$154.00	\$205.24	\$186.09	\$209.74
	Median	\$180	\$200	\$150	\$150	\$175	\$150	\$200
GIFT- OTHER	Mean	\$88.11	\$104.08	\$71.93	\$60.00	\$83.81	\$80.08	\$114.74
	Median	\$100	\$100	\$50	\$50	\$100	\$50	\$100
TRANS	Mean	\$133.64	\$147.43	\$119.67	\$6.00	\$105.48	\$122.34	\$200.26
	Median	\$50	\$60	\$40	\$0	\$50	\$50	\$180
OTHER	Mean	\$24.27	\$25.00	\$23.53	\$0.00	\$28.93	\$25.47	\$21.58
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$855.21	\$921.00	\$788.53	\$408.00	\$775.71	\$876.02	\$969.50
	Median	\$760	\$800	\$750	\$300	\$700	\$800	\$790

# On-Island Expenditures

## First Timers & Repeaters

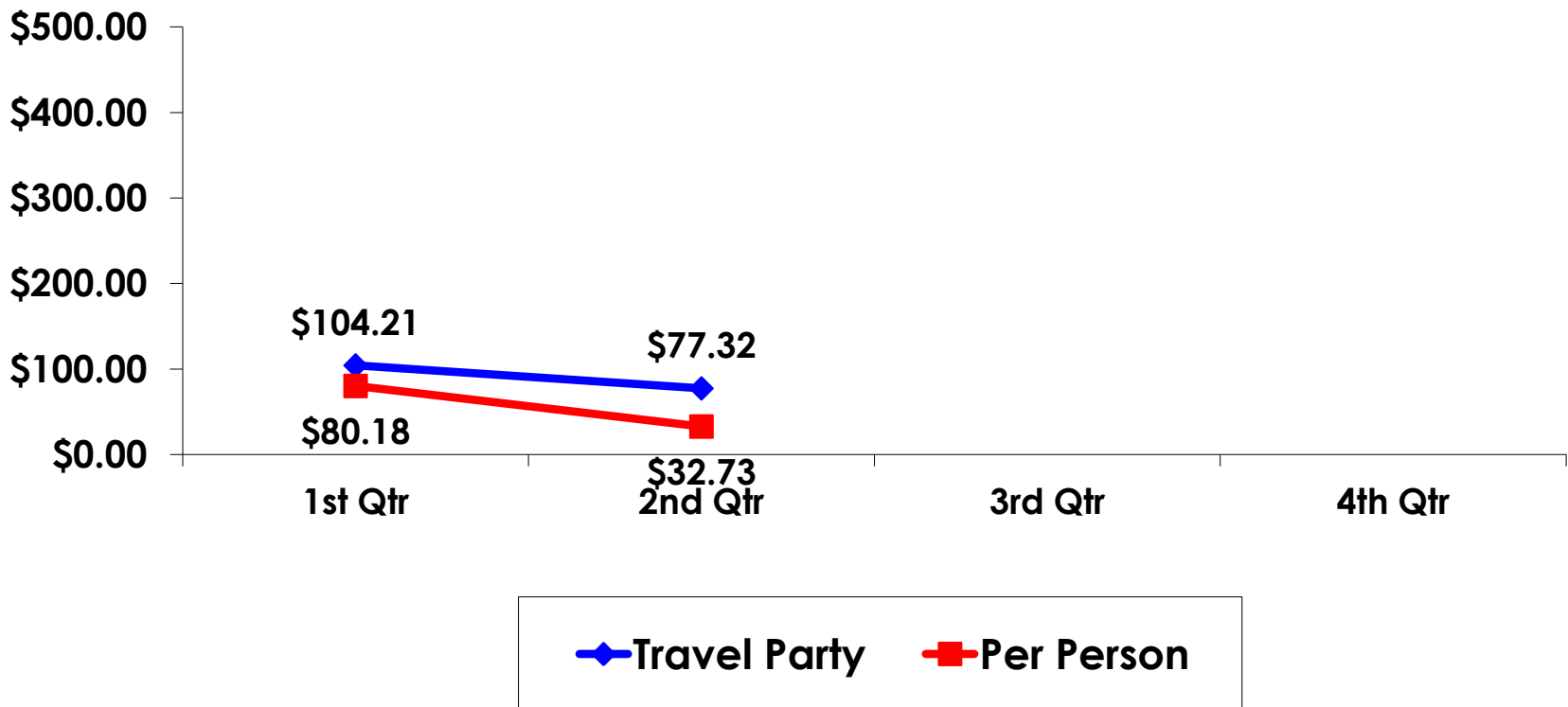
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$112.44	\$93.34	\$126.49
	Median	\$60	\$50	\$80
F&B FF/STORE	Mean	\$87.23	\$73.83	\$97.09
	Median	\$75	\$63	\$100
F&B RESTRNT	Mean	\$121.56	\$138.67	\$108.97
	Median	\$100	\$100	\$100
OPT TOUR	Mean	\$91.79	\$141.88	\$54.94
	Median	\$60	\$100	\$0
GIFT- SELF	Mean	\$196.16	\$201.56	\$192.18
	Median	\$180	\$200	\$150
GIFT- OTHER	Mean	\$88.11	\$94.06	\$83.74
	Median	\$100	\$100	\$100
TRANS	Mean	\$133.64	\$92.14	\$164.17
	Median	\$50	\$40	\$100
OTHER	Mean	\$24.27	\$28.36	\$21.26
	Median	\$0	\$0	\$0
TOTAL	Mean	\$855.21	\$863.84	\$848.85
	Median	\$760	\$800	\$750



# ON-ISLE EXPENDITURES – Per Day

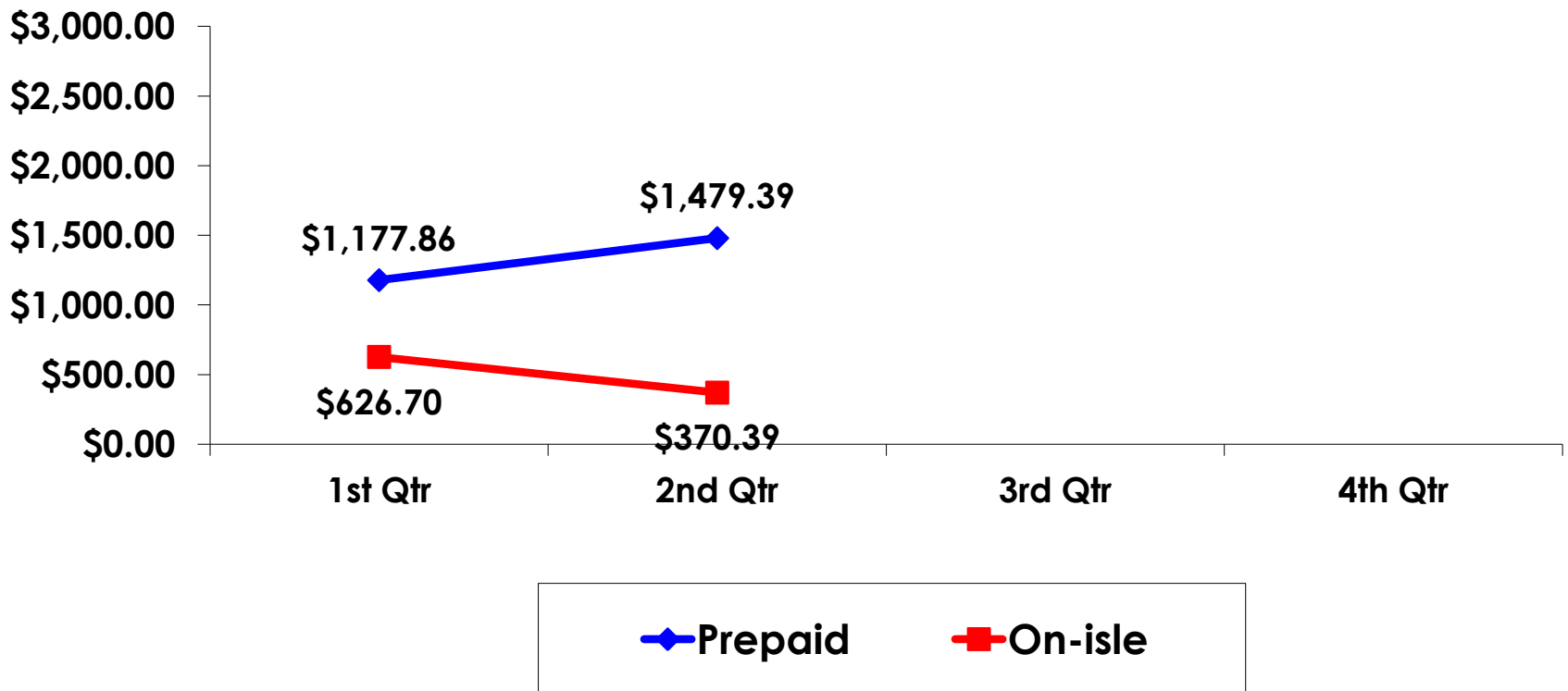
Travel Party YTD = \$90.81

Per Person YTD = \$56.54



# PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$1,329.13      On-Isle YTD = \$498.12



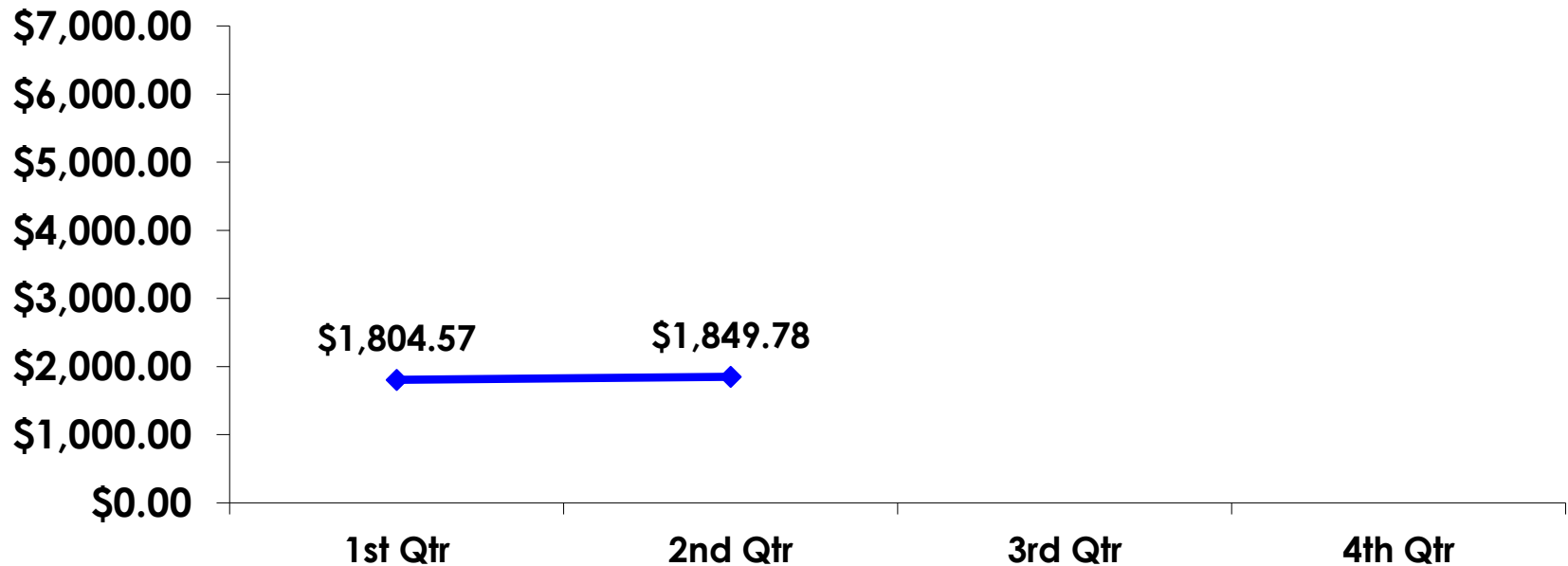
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# Total Expenditures Per Person (Prepaid & On-Island)

- \$1,849.78 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,256 = Maximum (highest amount recorded for the entire sample)

# TOTAL EXPENDITURES

## Per Person



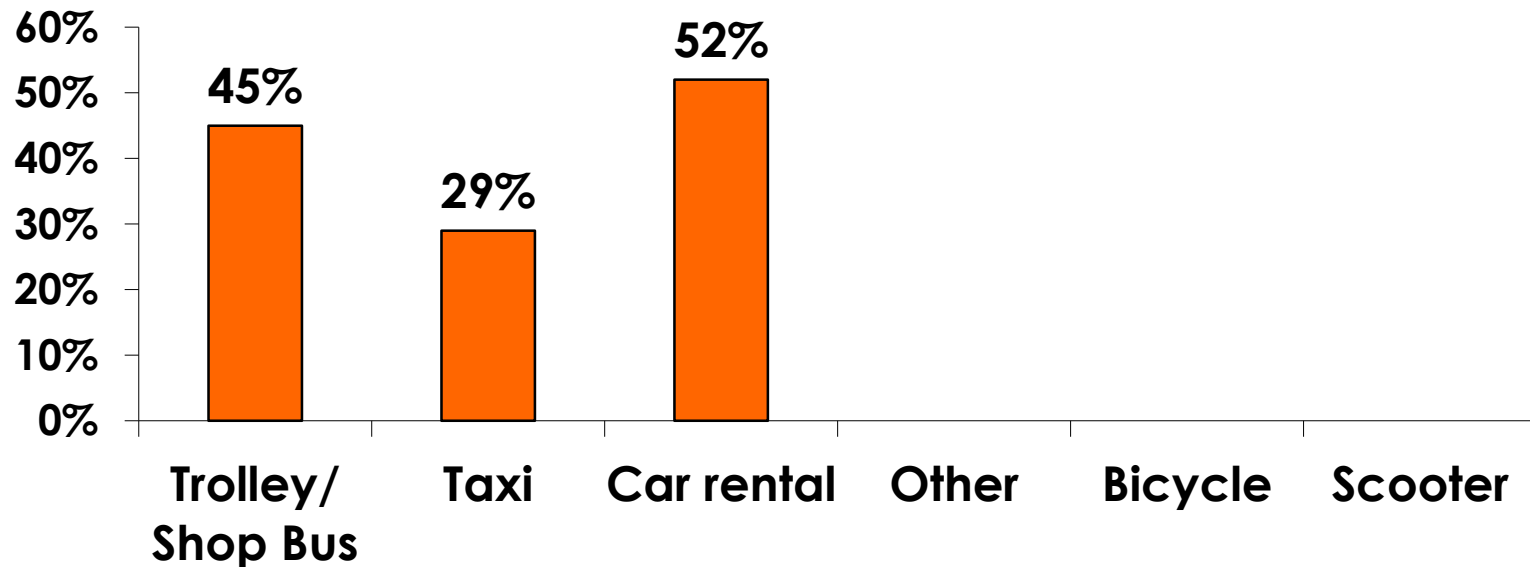
YTD=\$1,827.25

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$112.44
Food & beverage in fast food restaurant/convenience store	\$87.23
Food & beverage at restaurants or drinking establishments outside a hotel	\$121.56
Optional tours and activities	\$91.79
Gifts/ souvenirs for yourself/companions	\$196.16
Gifts/ souvenirs for friends/family at home	\$88.11
Local transportation	\$133.64
Other expenses not covered	\$24.27
<b>Average Total</b>	<b>\$855.21</b>

# Local Transportation

n=113



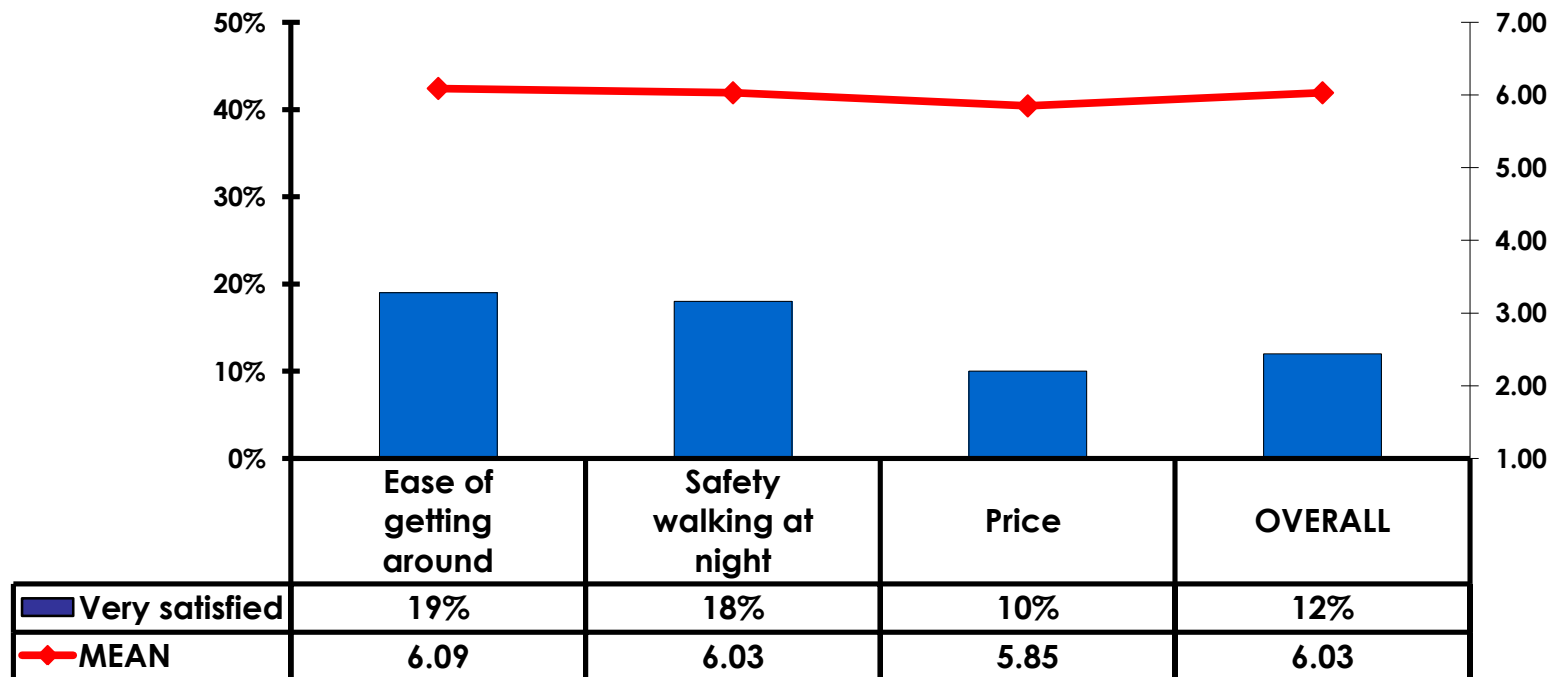
Mean=\$133.64 per travel party

# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied

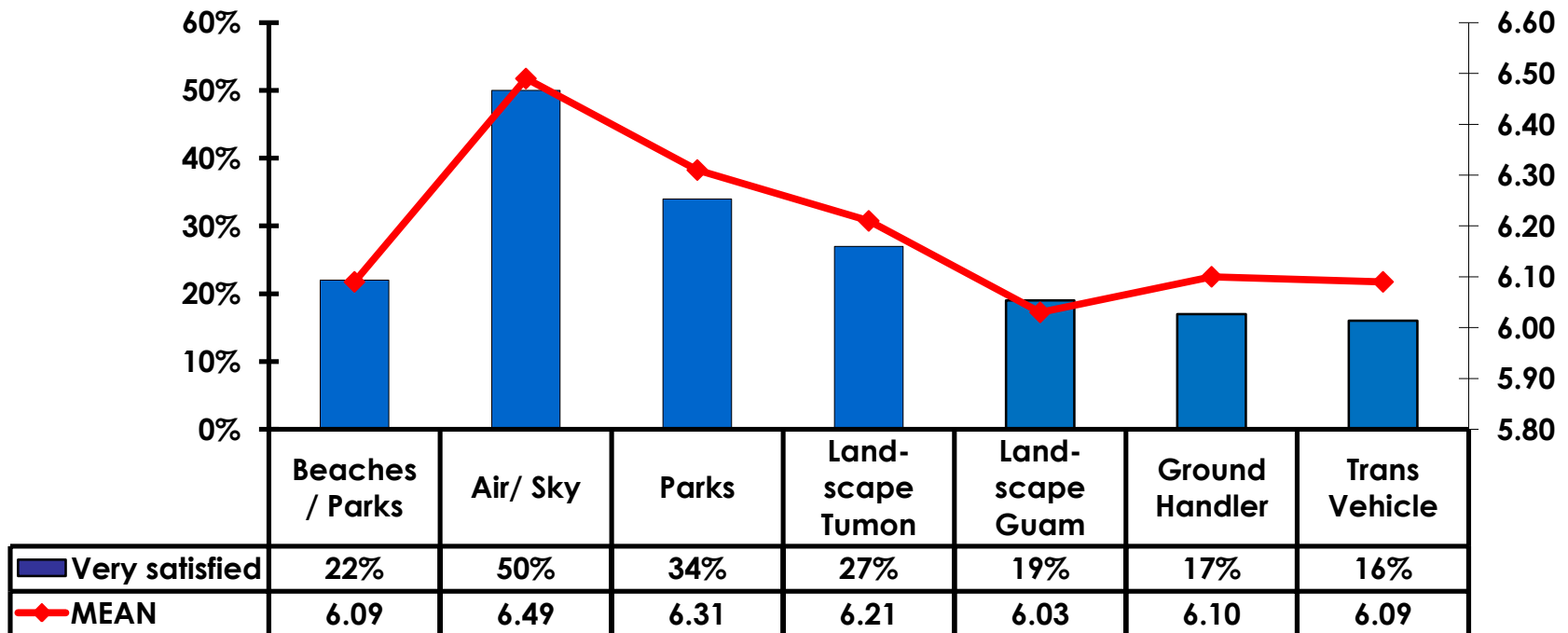




# Satisfaction Quality/ Cleanliness

7pt Rating Scale

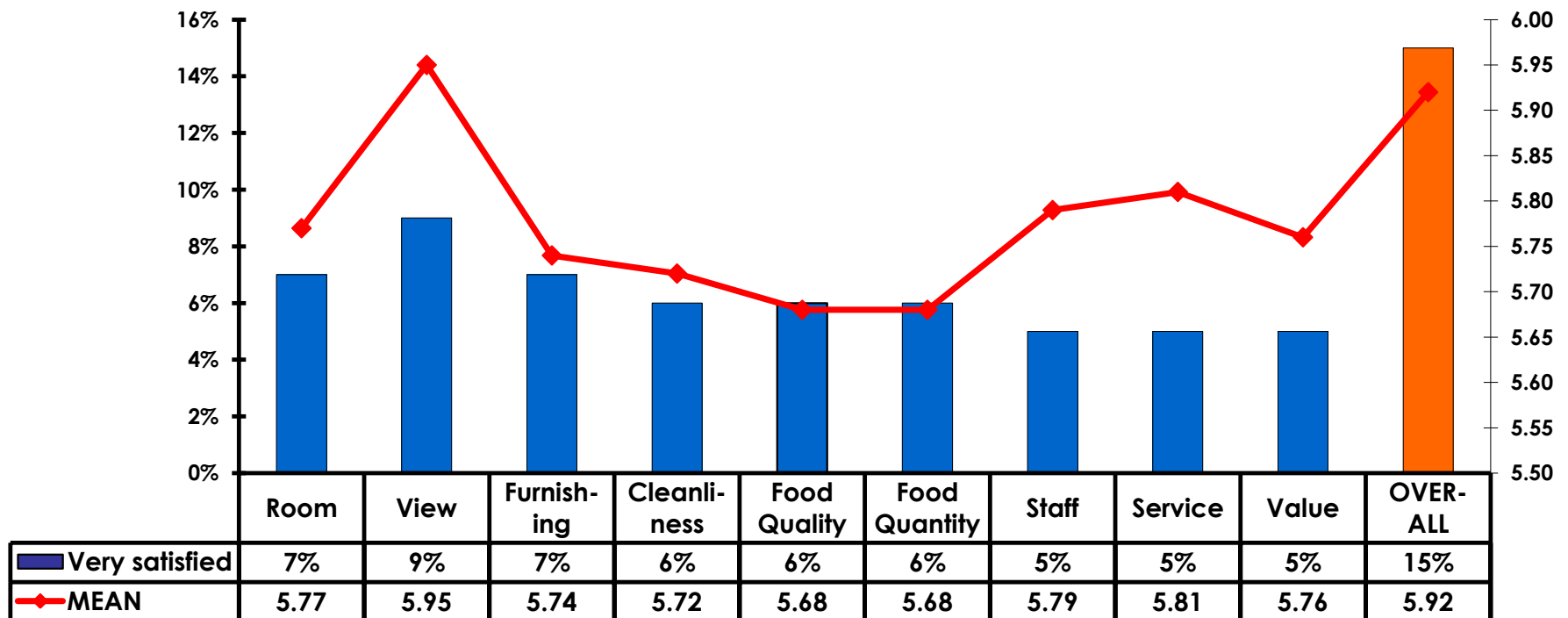
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

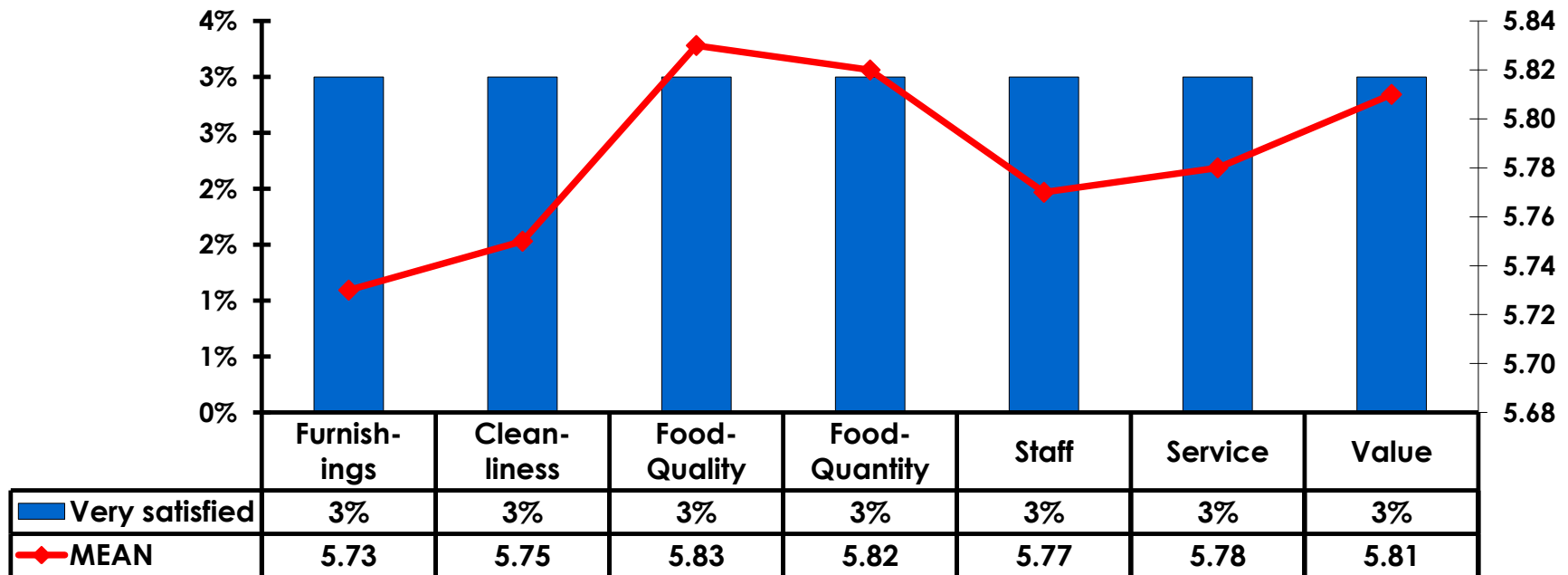
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

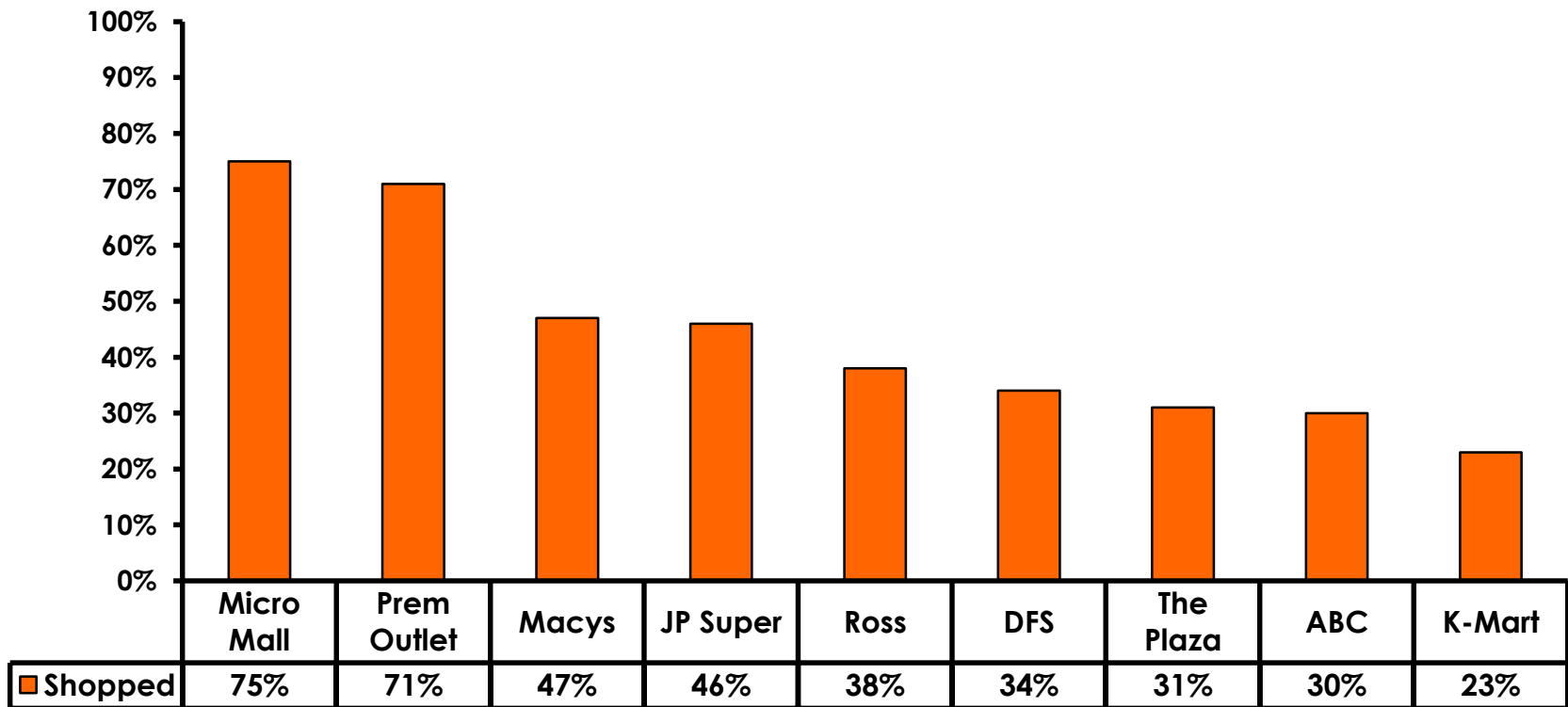
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

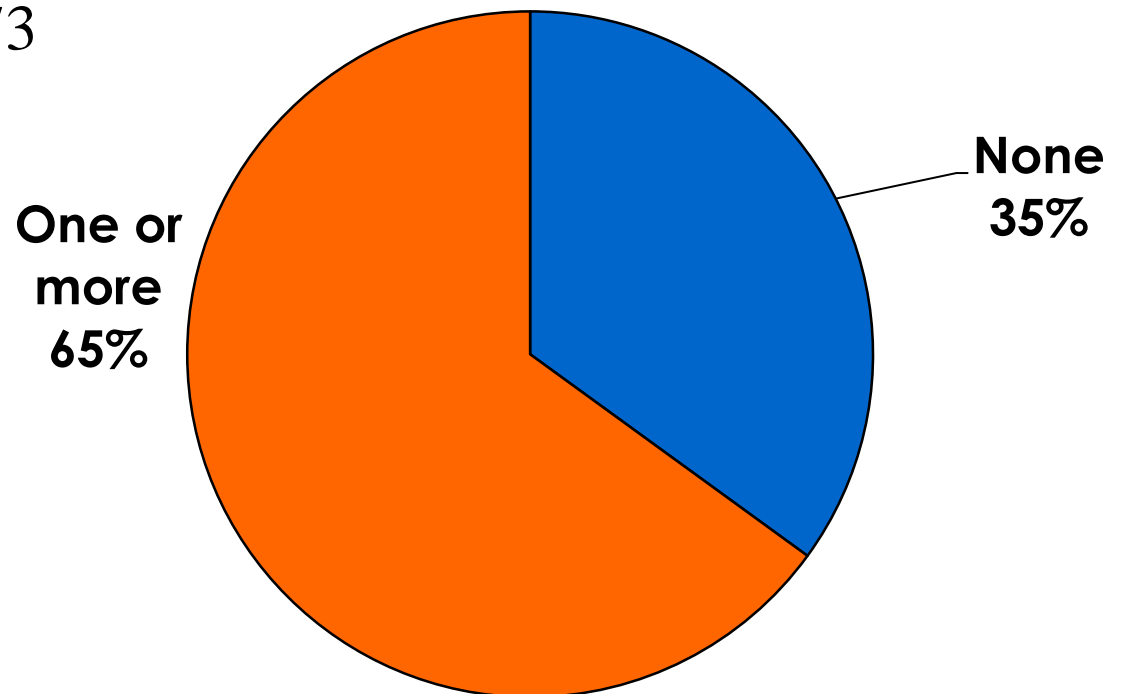
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

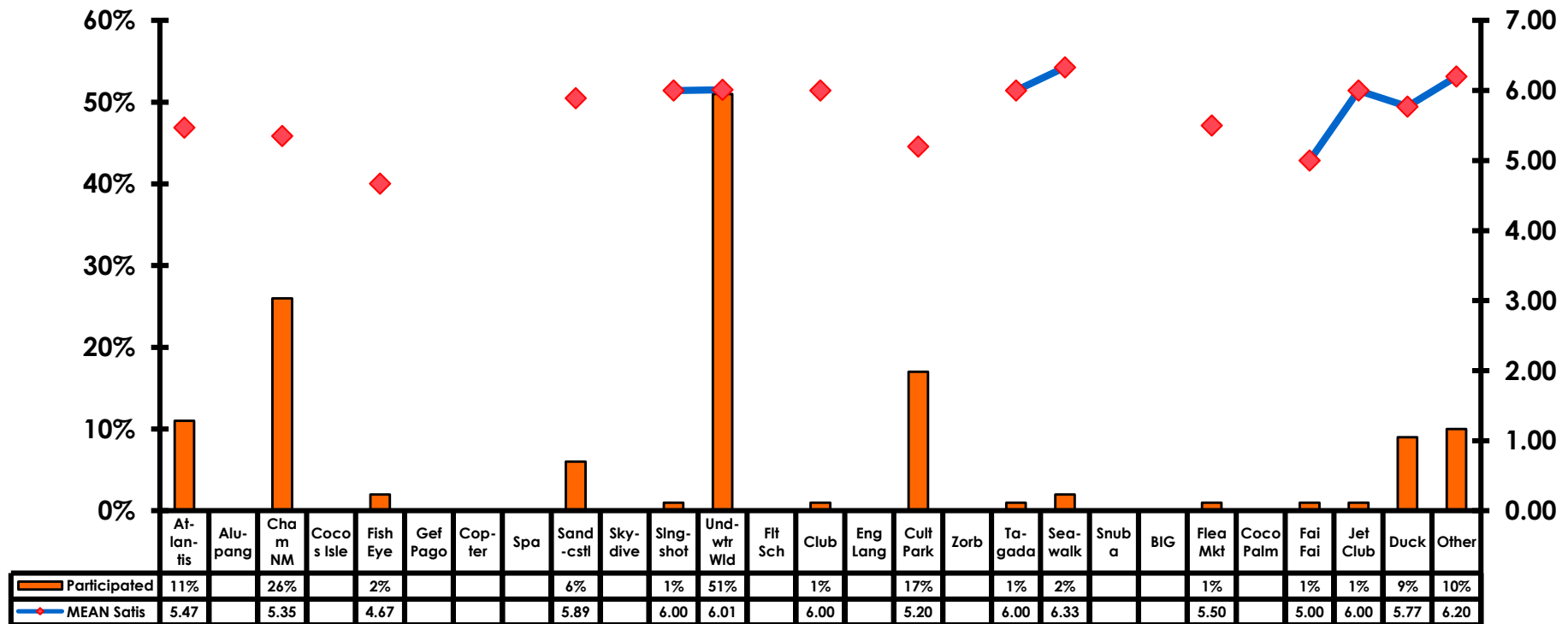
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>58%</b>	Score of 6 to 7 = <b>53%</b>
Score of 4 to 5 = <b>41%</b>	Score of 4 to 5 = <b>44%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>3%</b>
<b>MEAN = 5.56</b>	<b>MEAN = 5.49</b>

# Optional Tour Participation

- Average number of tours participated in is 1.73



# 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>80%</b>	Score of 6 to 7 = <b>63%</b>
Score of 4 to 5 = <b>20%</b>	Score of 4 to 5 = <b>32%</b>
Score 1 to 3 = <b>-%</b>	Score 1 to 3 = <b>5%</b>
<b>MEAN = 5.91</b>	<b>MEAN = 5.55</b>



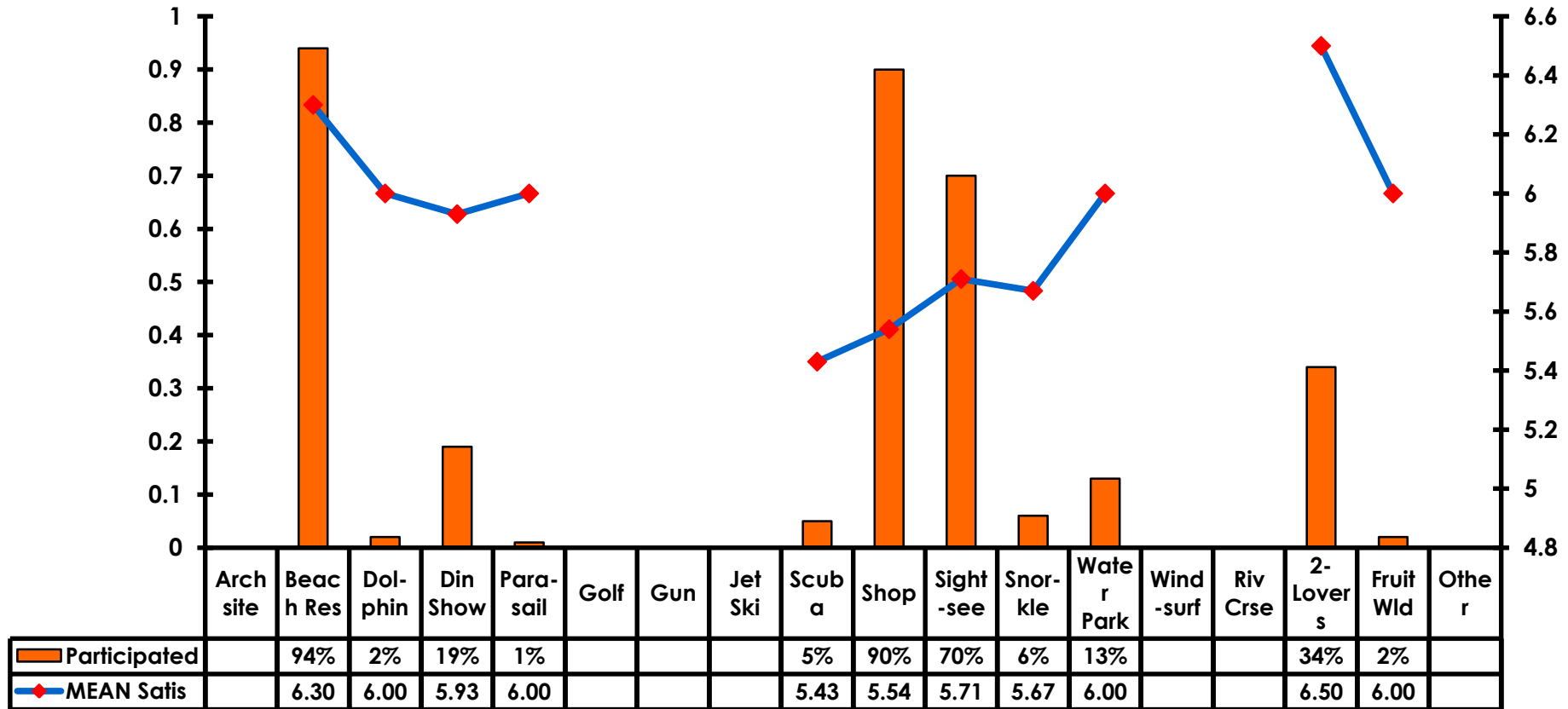
# Night Tours Satisfaction

7pt Rating Scale

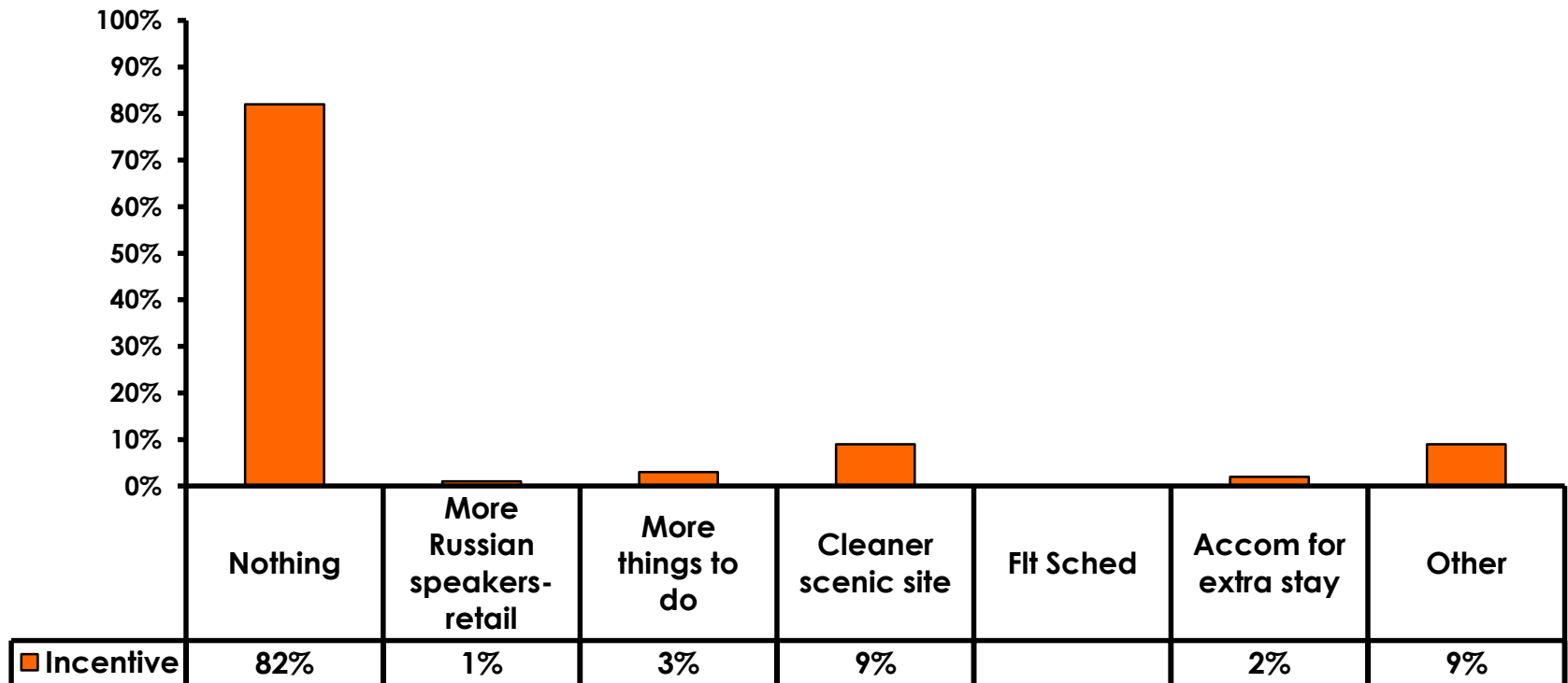
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>56%</b>	Score of 6 to 7 = <b>52%</b>
Score of 4 to 5 = <b>43%</b>	Score of 4 to 5 = <b>39%</b>
Score 1 to 3 = <b>-%</b>	Score 1 to 3 = <b>9%</b>
<b>MEAN = 5.41</b>	<b>MEAN = 5.27</b>

# Satisfaction with Other Activities



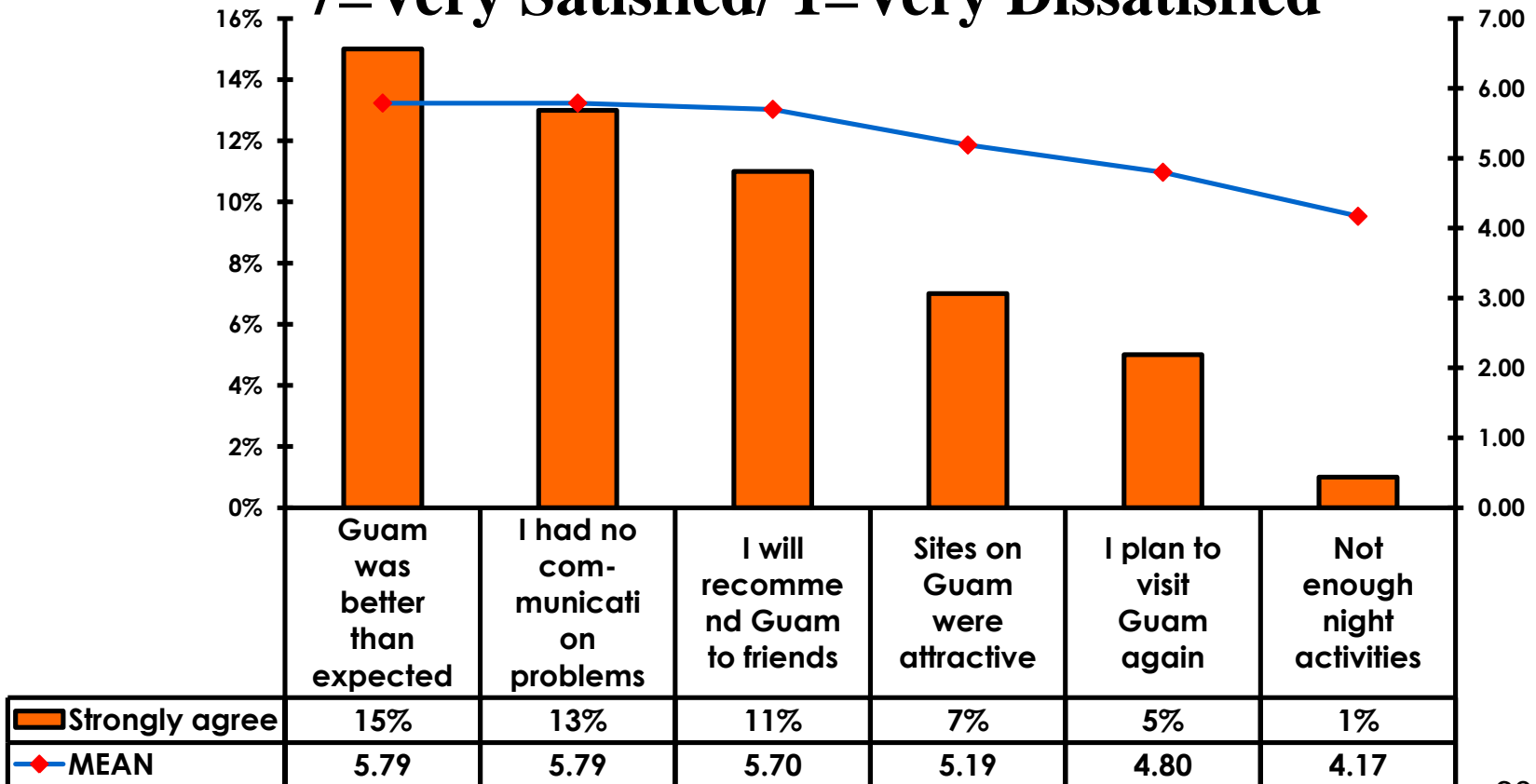
# What would it take to make Guam more enjoyable for families?



# On-Island Perceptions

7pt Rating Scale

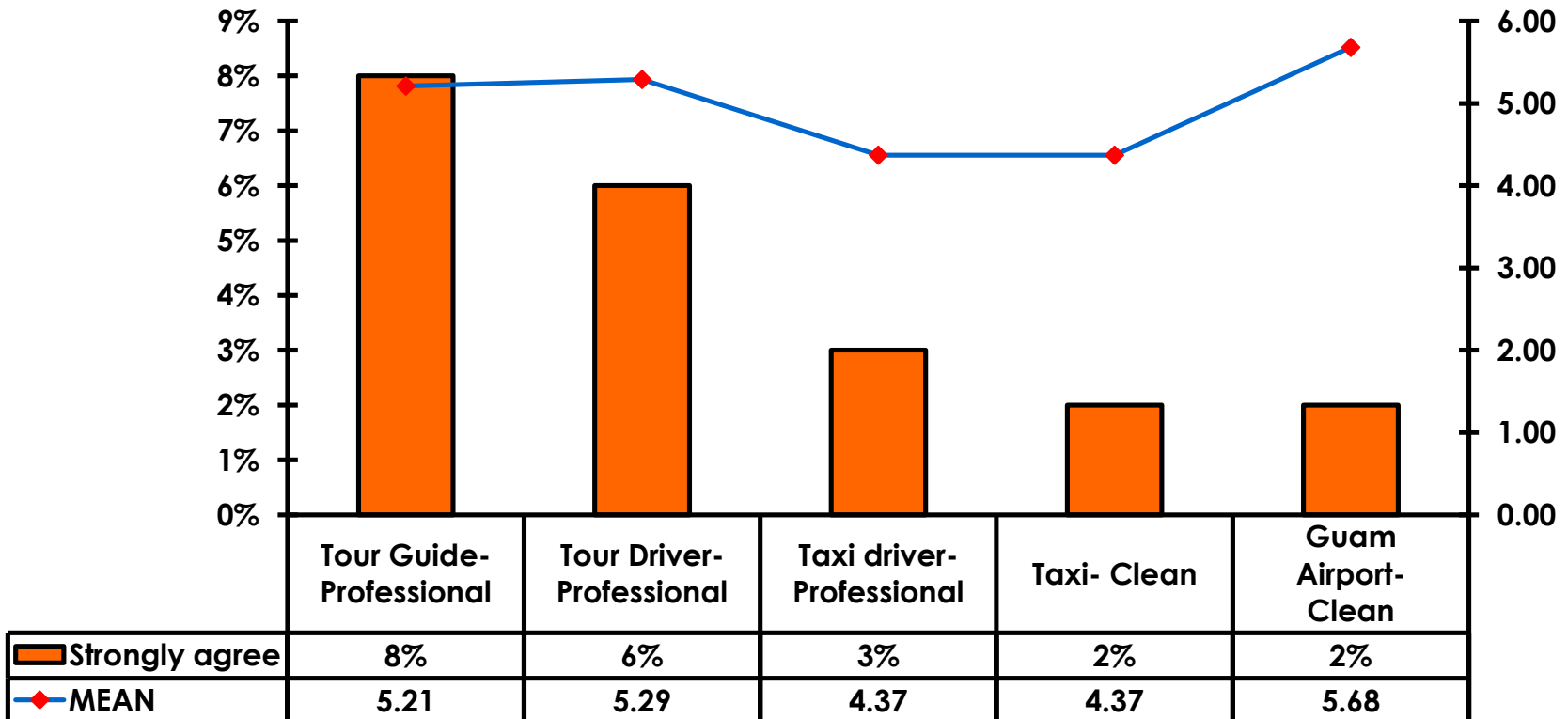
7=Very Satisfied/ 1=Very Dissatisfied



# Transportation

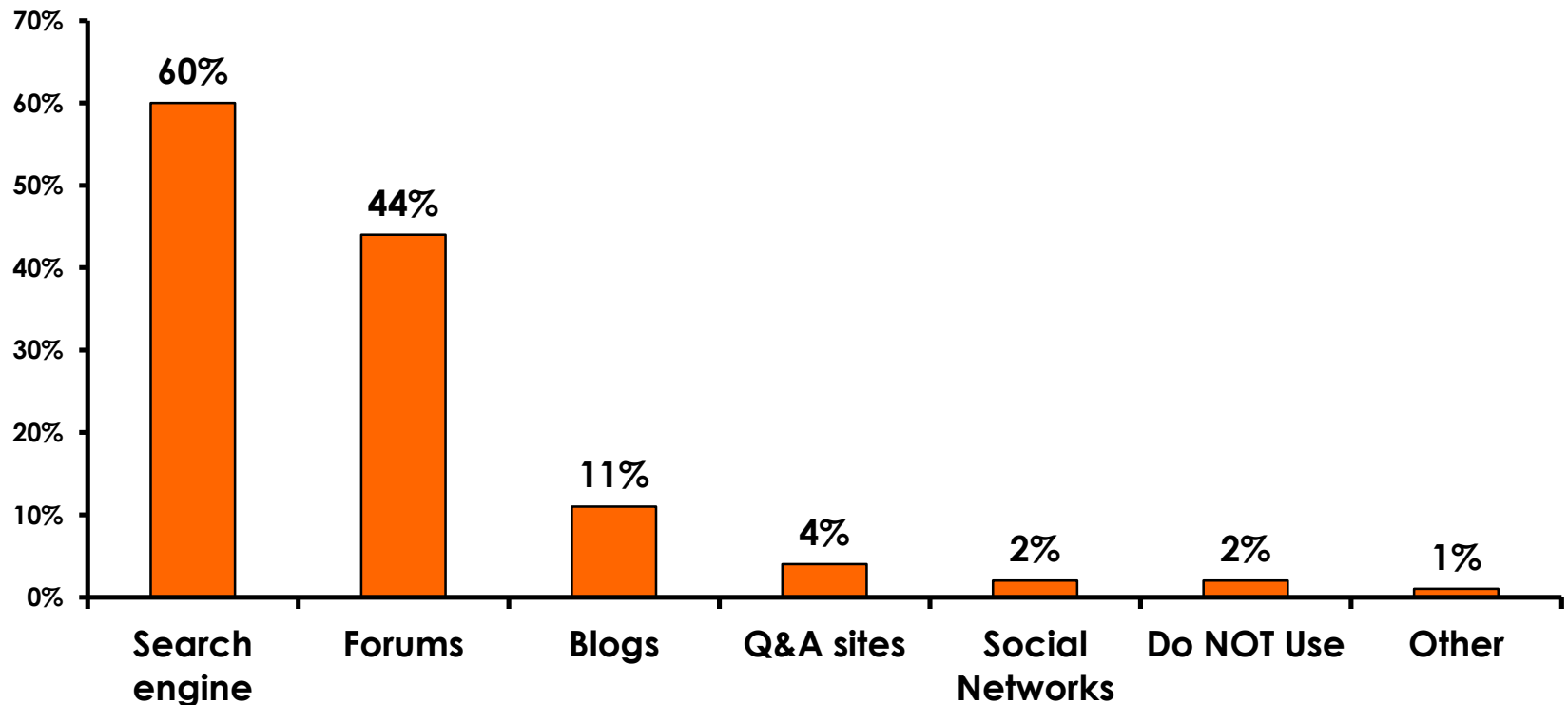
7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree

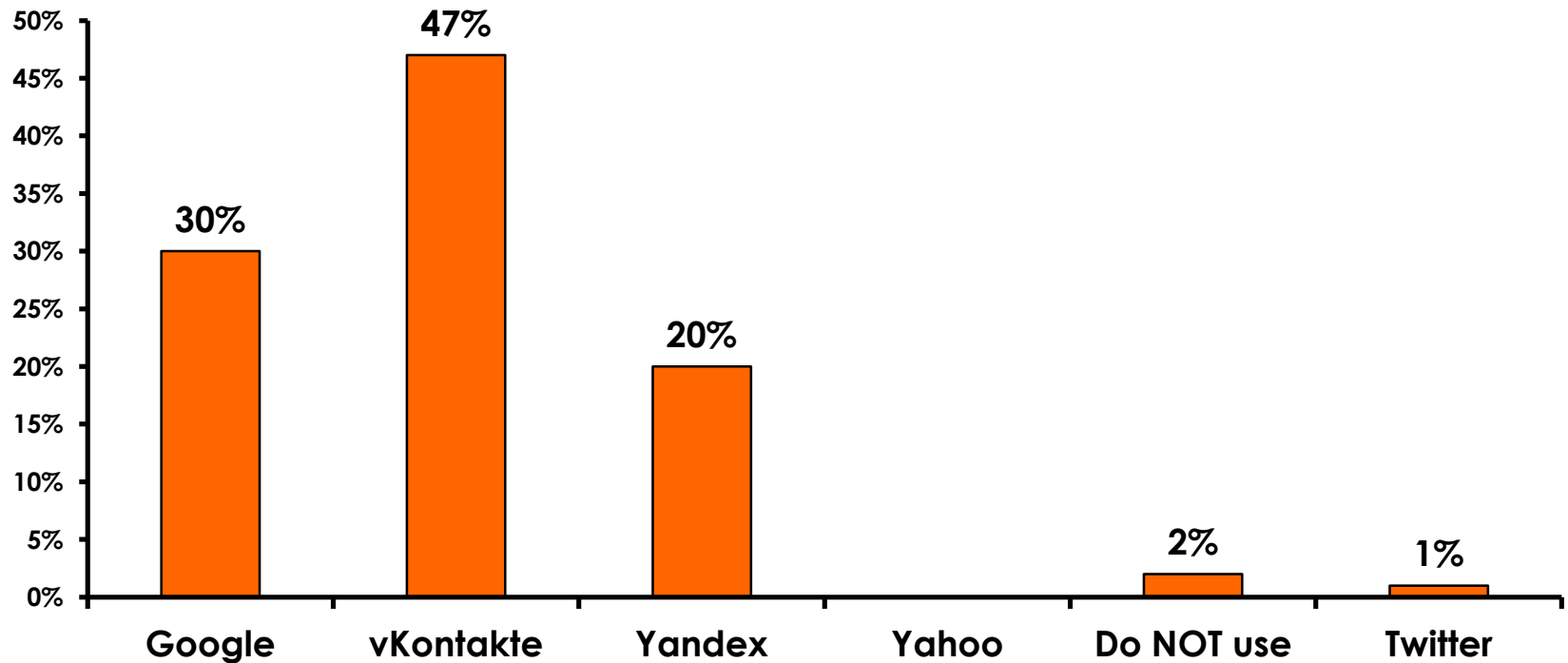


# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info

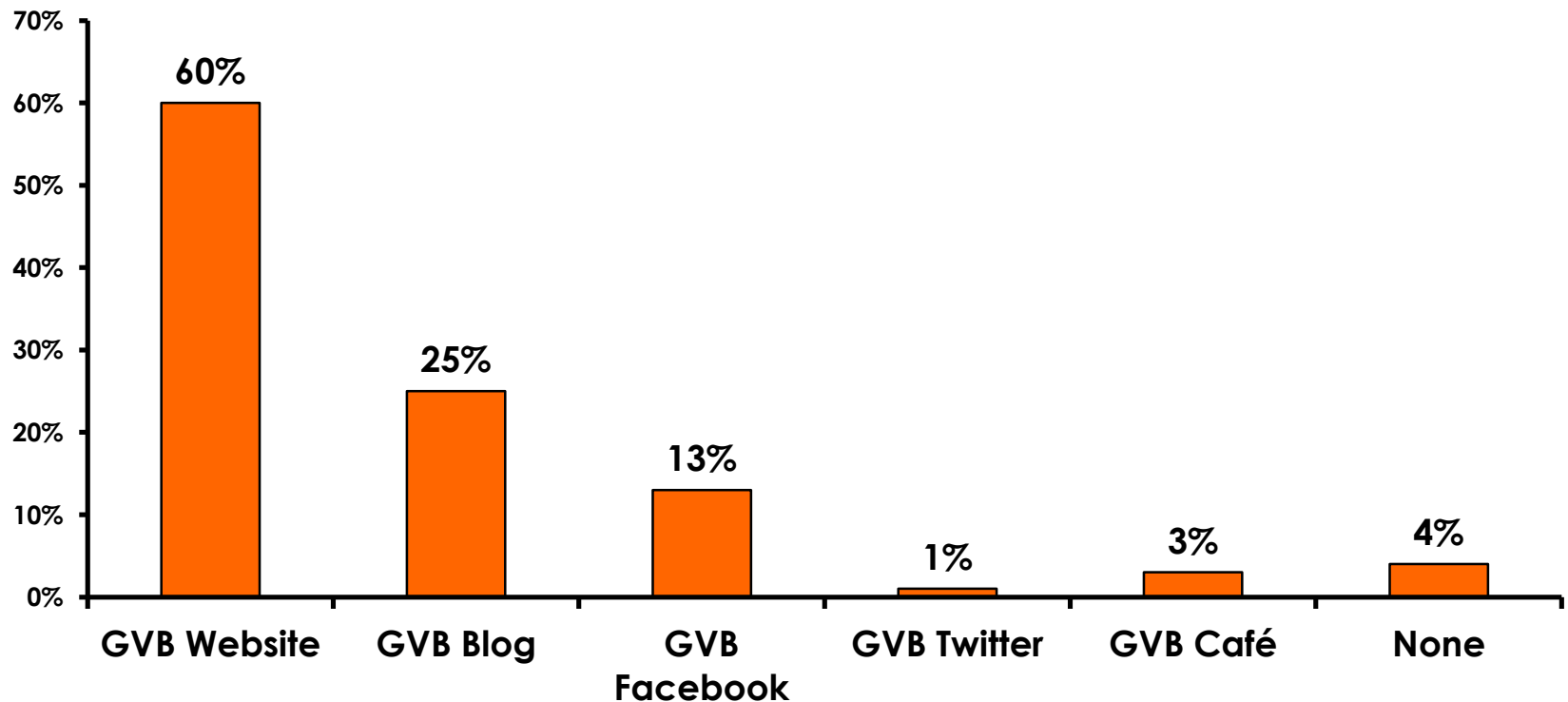


## Internet- Things To Do Sources of Info

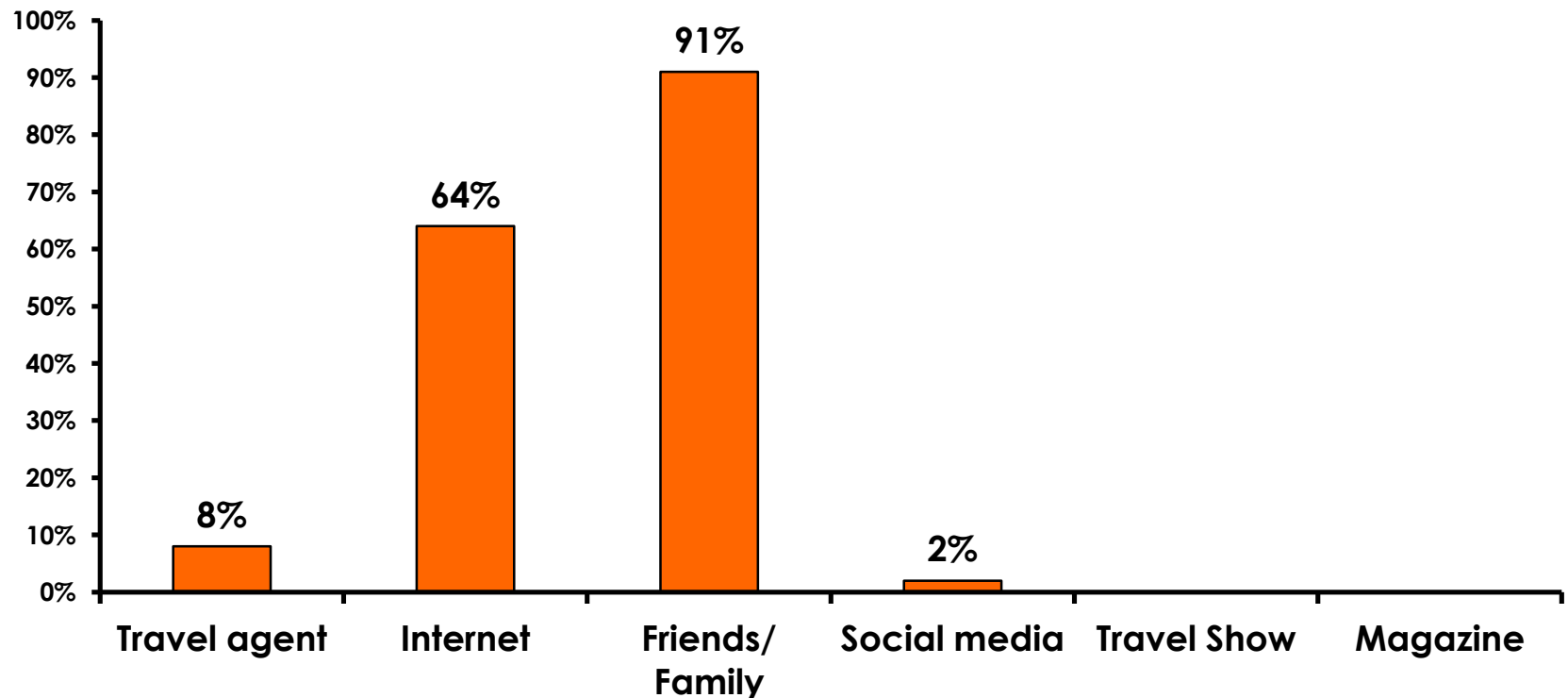




# Internet- GVB Sources

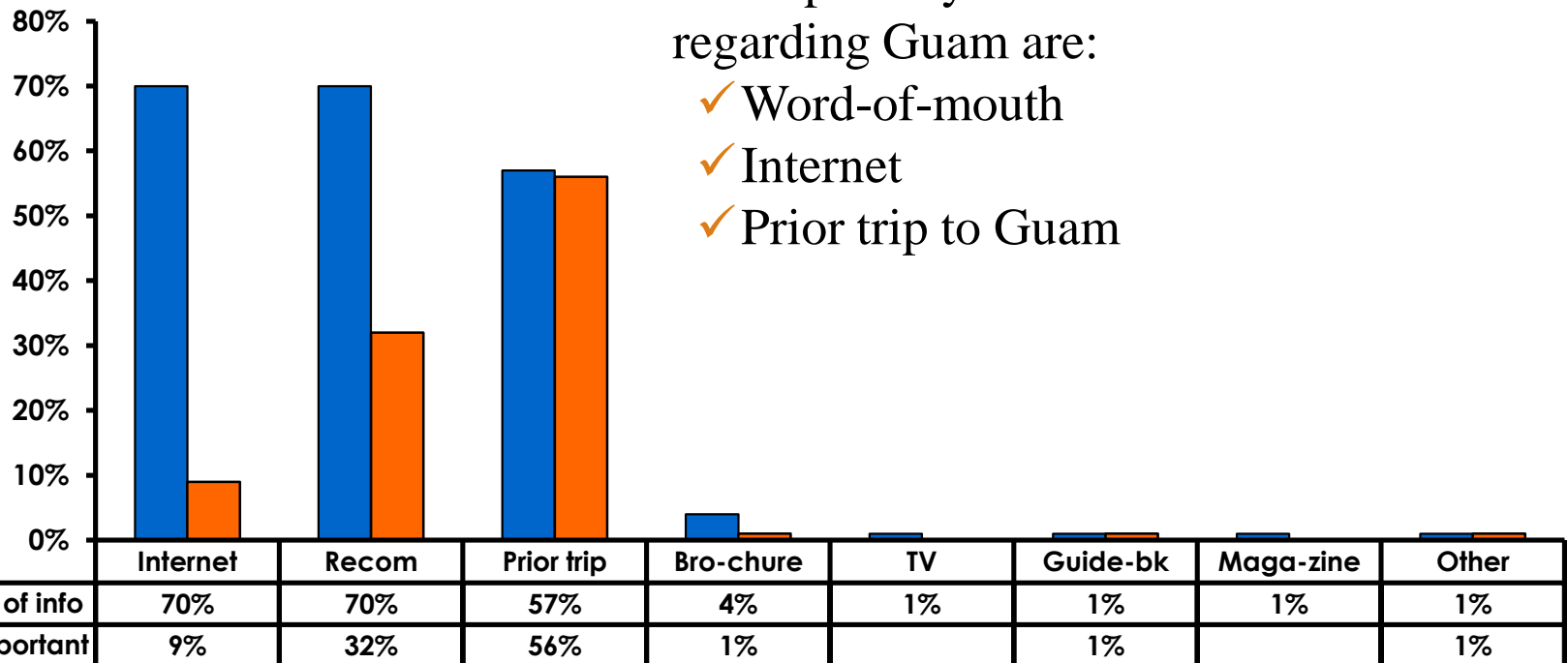


# Travel Motivation- Info Sources



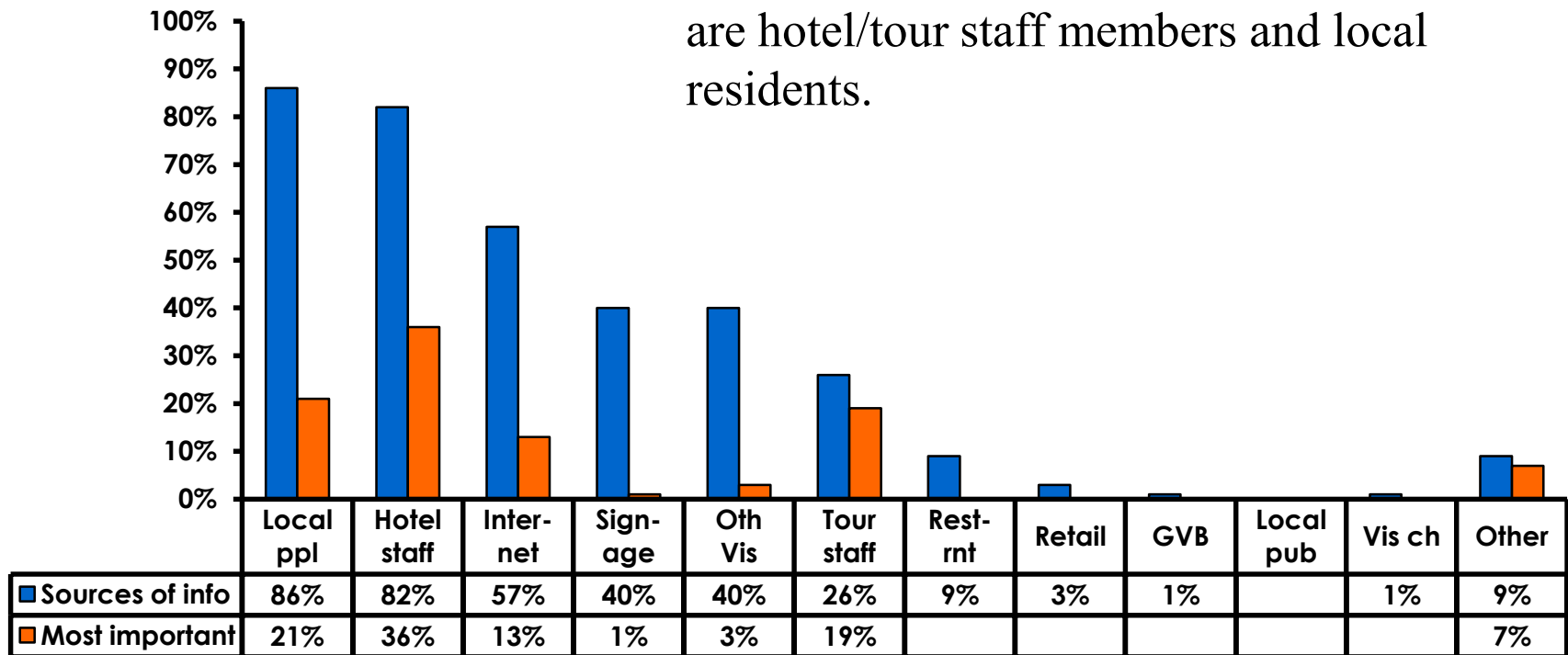
# Sources of Information Pre-arrival

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



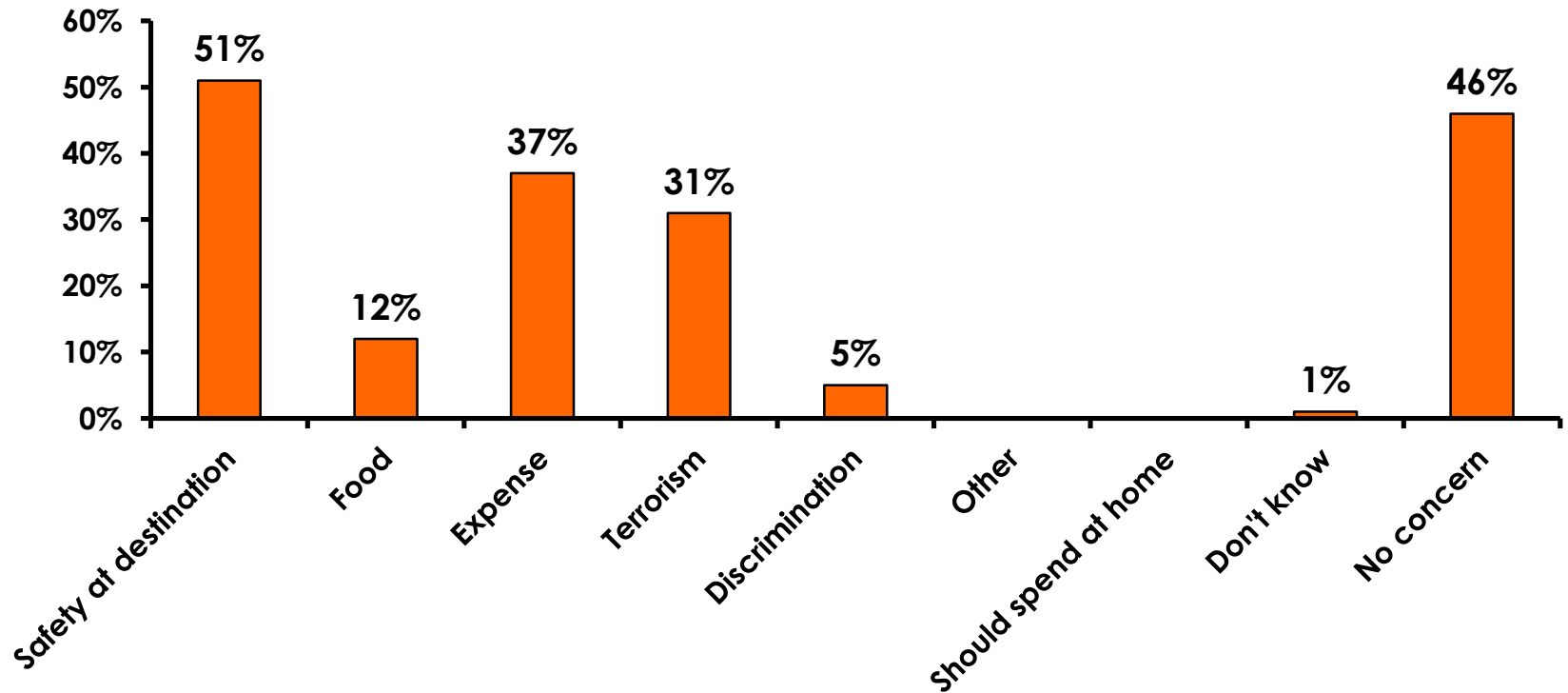
# Sources of Information Post-arrival

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



# SECTION 6 **OTHER ISSUES**

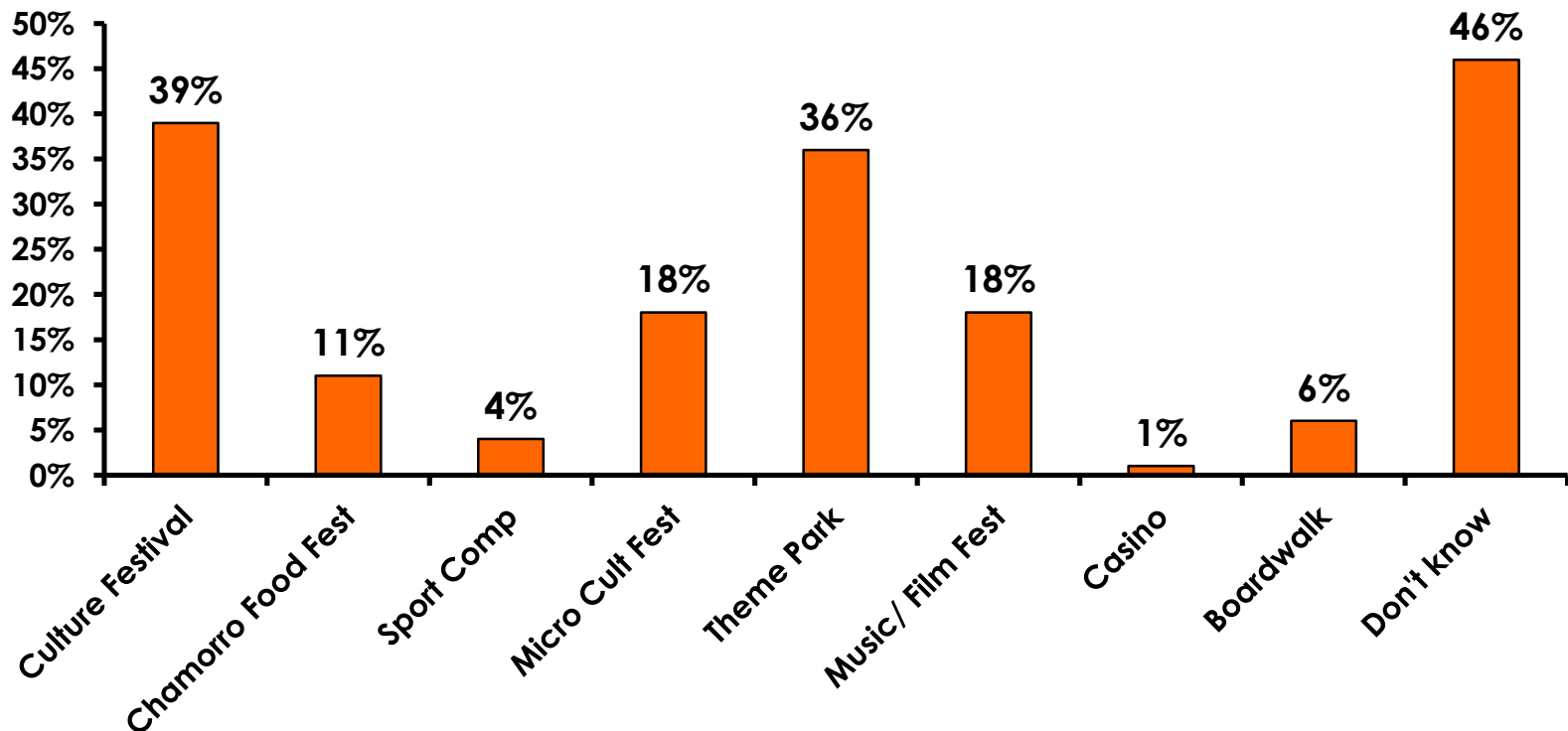
# Concerns about travel outside of Russia - Overall



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

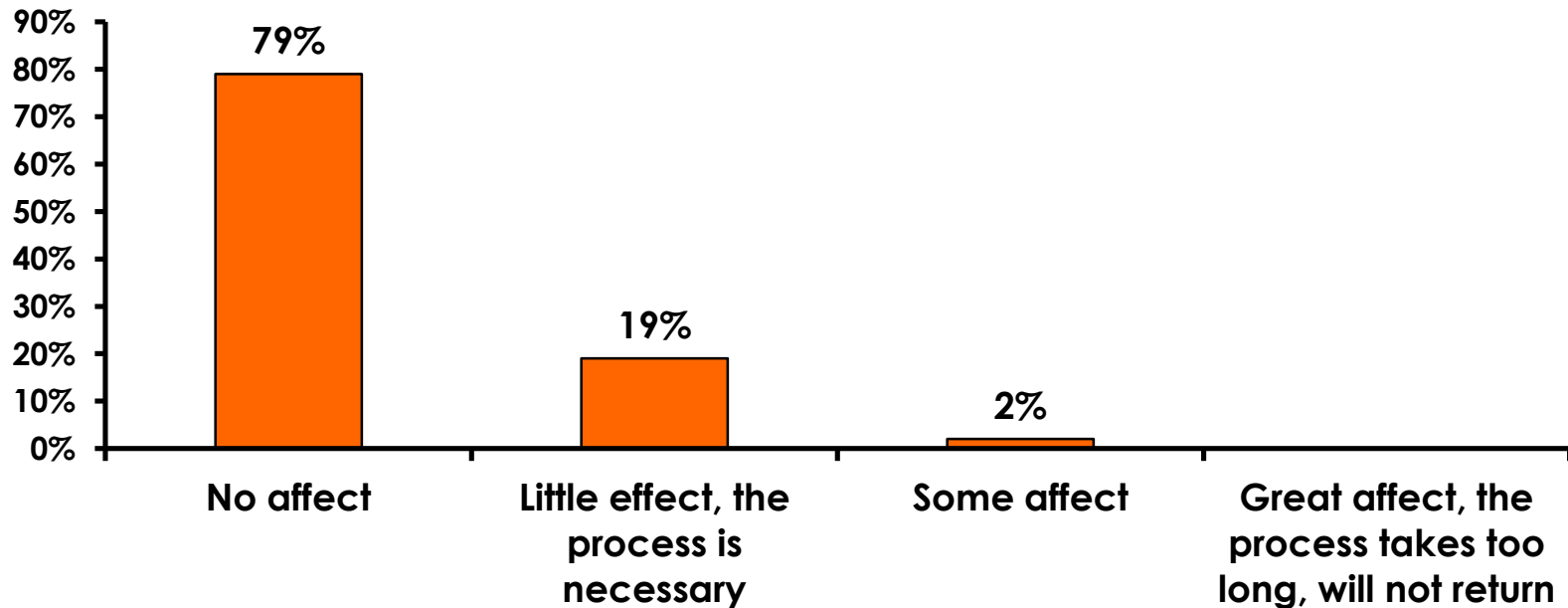
		TOTAL	AGE				Q27						
		-	18-24	25-34	35-49	50+	<732,321	732,321-1,098,481	1,098,482-1,464,642	1,464,643-1,830,803	1,830,803-2,263,124	2,263,125-3,661,606	3,661,607+
Q21	Safety	51%	40%	50%	55%	45%	50%	53%	51%	53%	60%		
	No concerns	46%	60%	48%	42%	53%	50%	43%	46%	44%	40%	100%	
	Expense	37%	20%	33%	39%	39%	33%	50%	34%	44%	10%		
	Terrorism	31%	20%	21%	41%	24%	17%	33%	36%	31%	10%		
	Food	12%		19%	11%	8%	17%	10%	15%	9%	10%		
	Discrimination against Russians	5%		7%	6%			3%	9%	3%			
	Don't know	1%		2%	2%				1%	3%			
	Total	Count	5	42	64	38	6	30	67	32	10	3	

# Activities/ Attractions- Appeal





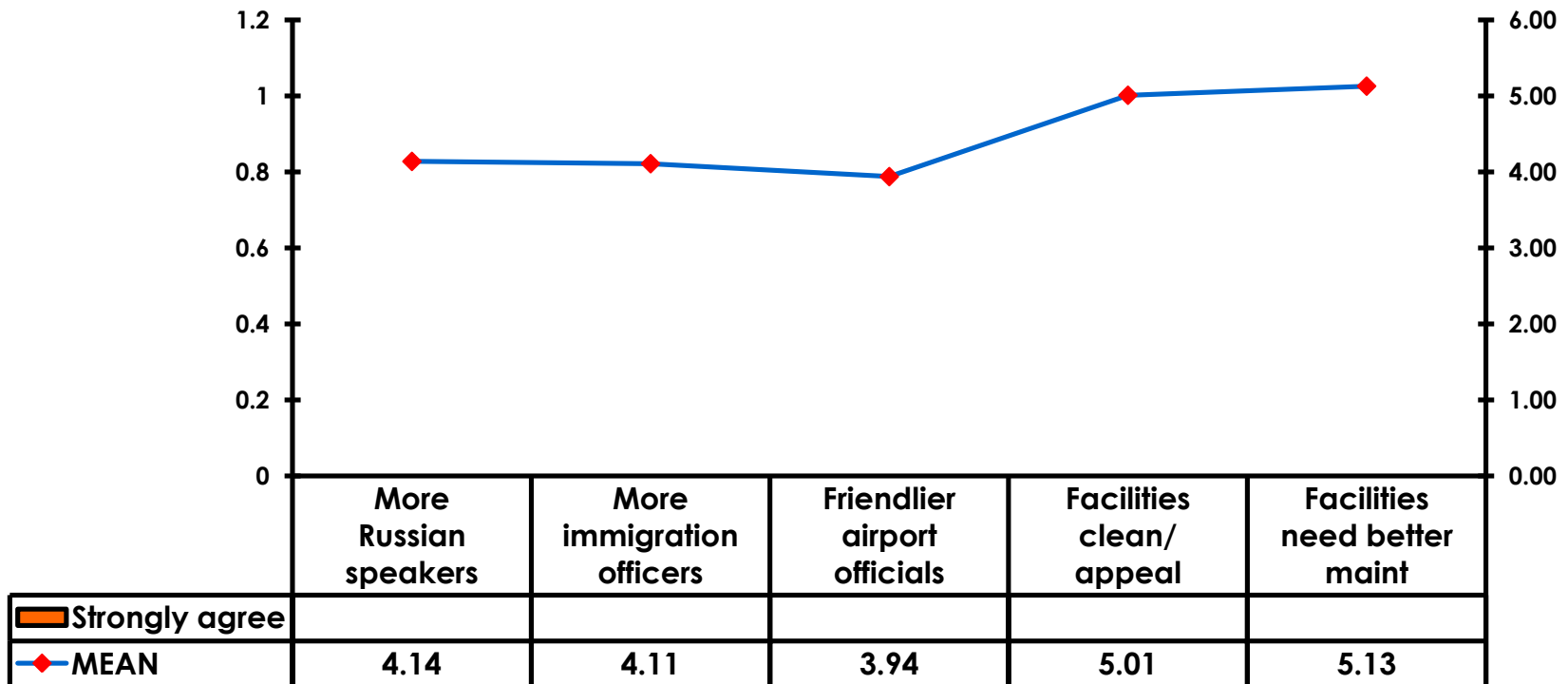
# Security Screening/ Immigration Process at Guam International Airport



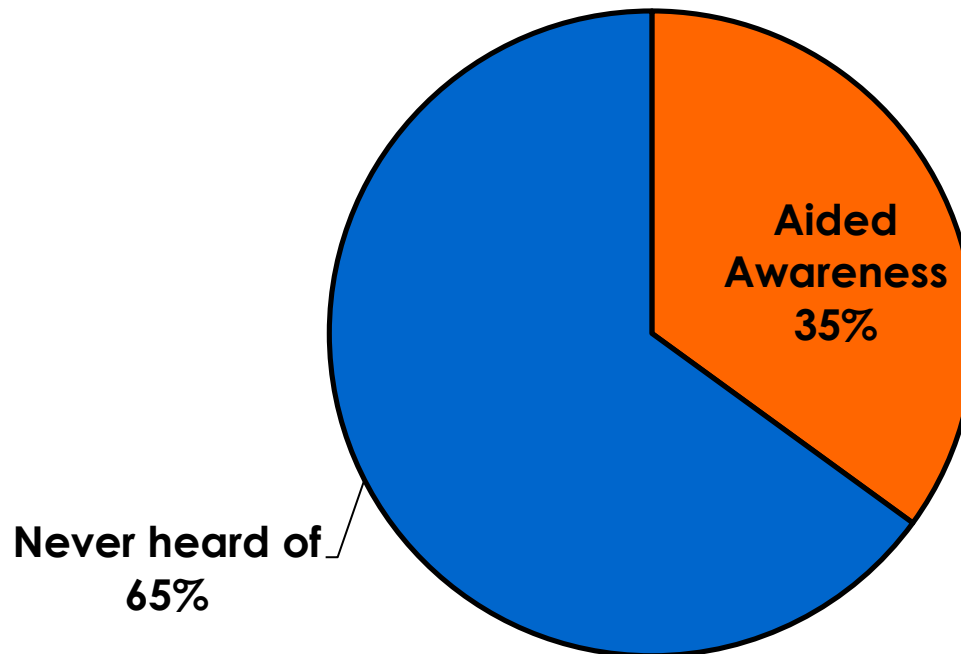
# Airport Arrival Experience

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



# Shop Guam Festival



# Shop Guam Festival - Impact

n=53

