



# **GUAM VISITORS BUREAU**

## **Russia Visitor Tracker Exit Profile**

### **FY2016**

### **4<sup>TH</sup> QTR (JUL~SEPT 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 **125** 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 **125** is +/- 8.7 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 +/- 8.7 percentage points.

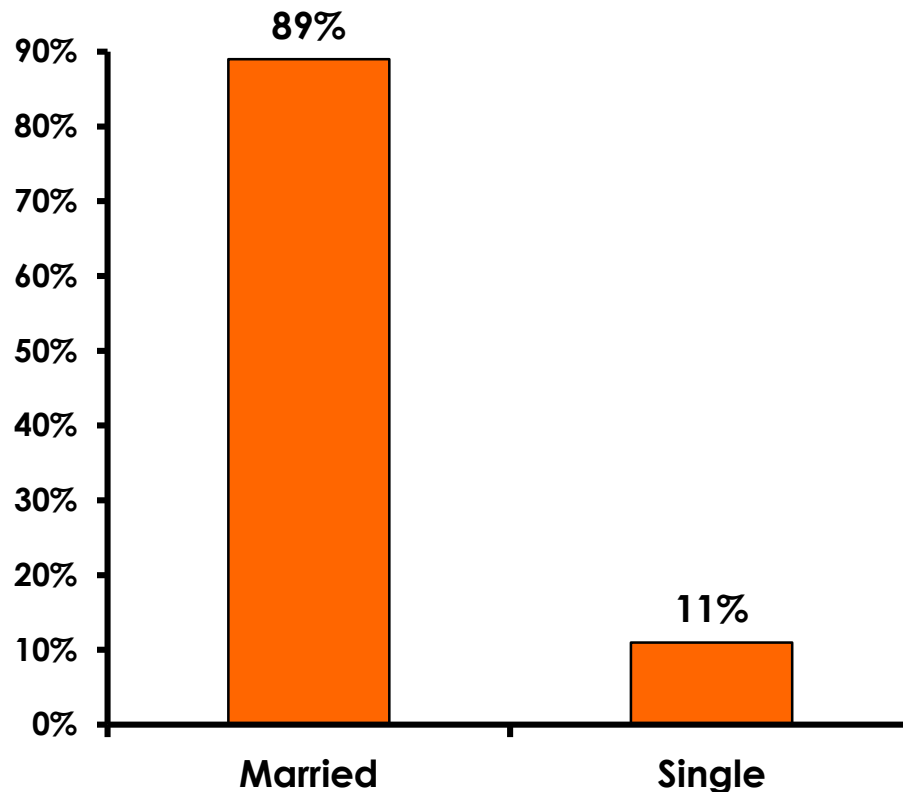
# OBJECTIVES

- 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

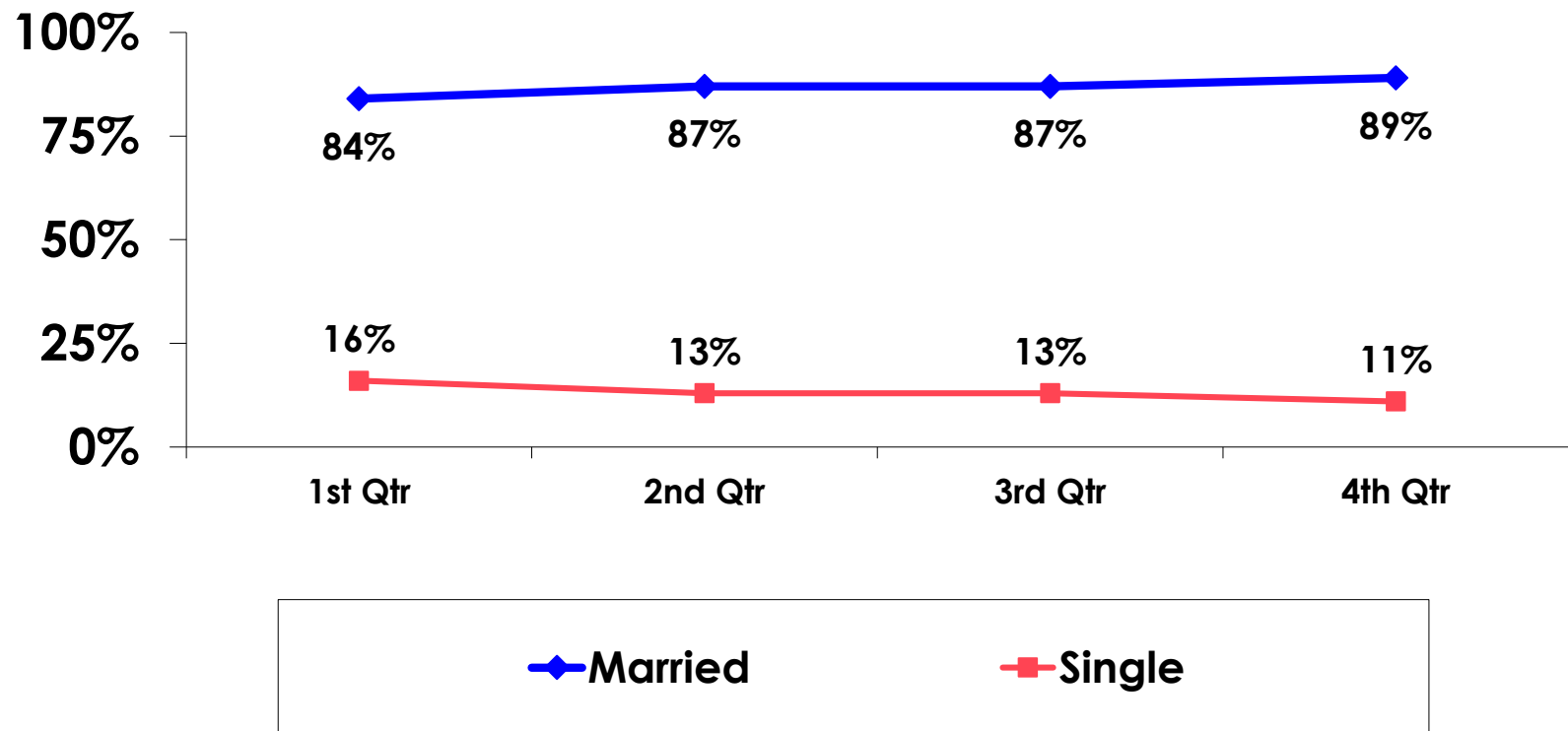
# **PROFILE OF RESPONDENTS**

# Marital Status - Overall

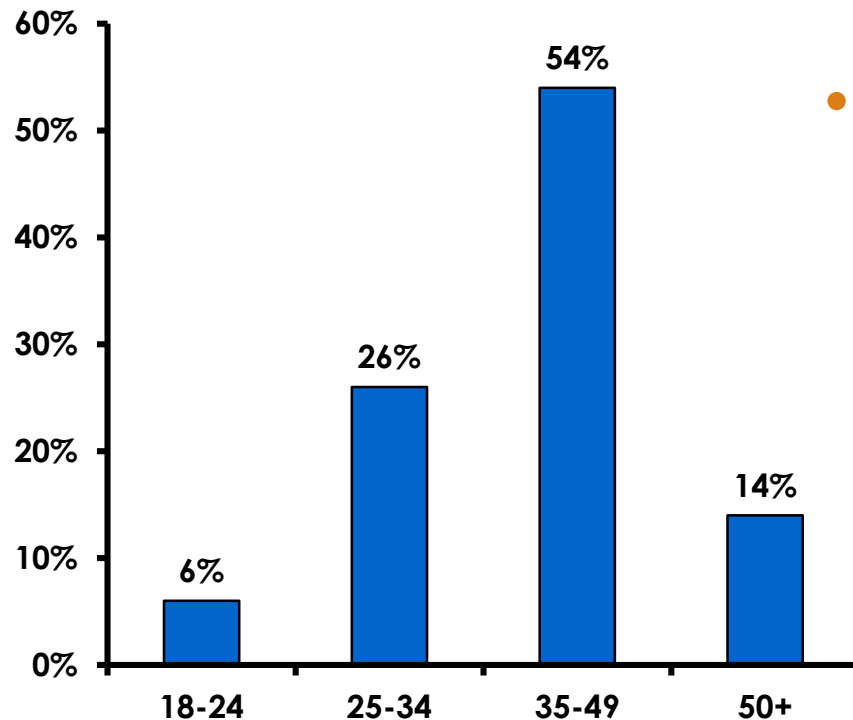


- Majority of Russian visitors are married.

# MARITAL STATUS

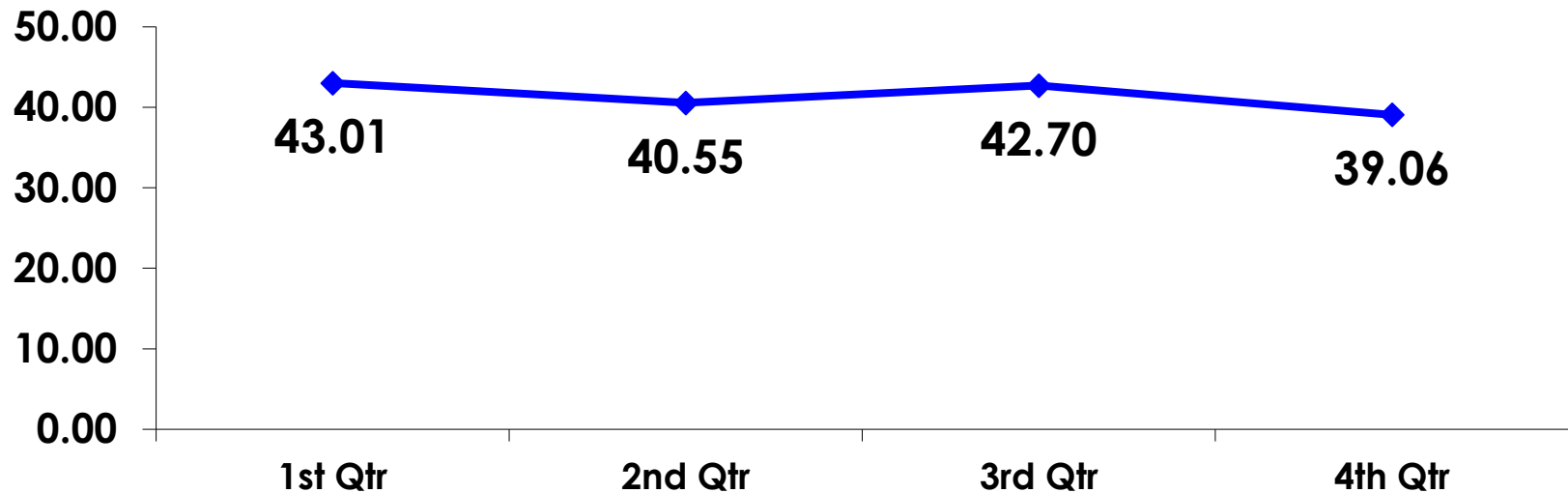


# Age - Overall



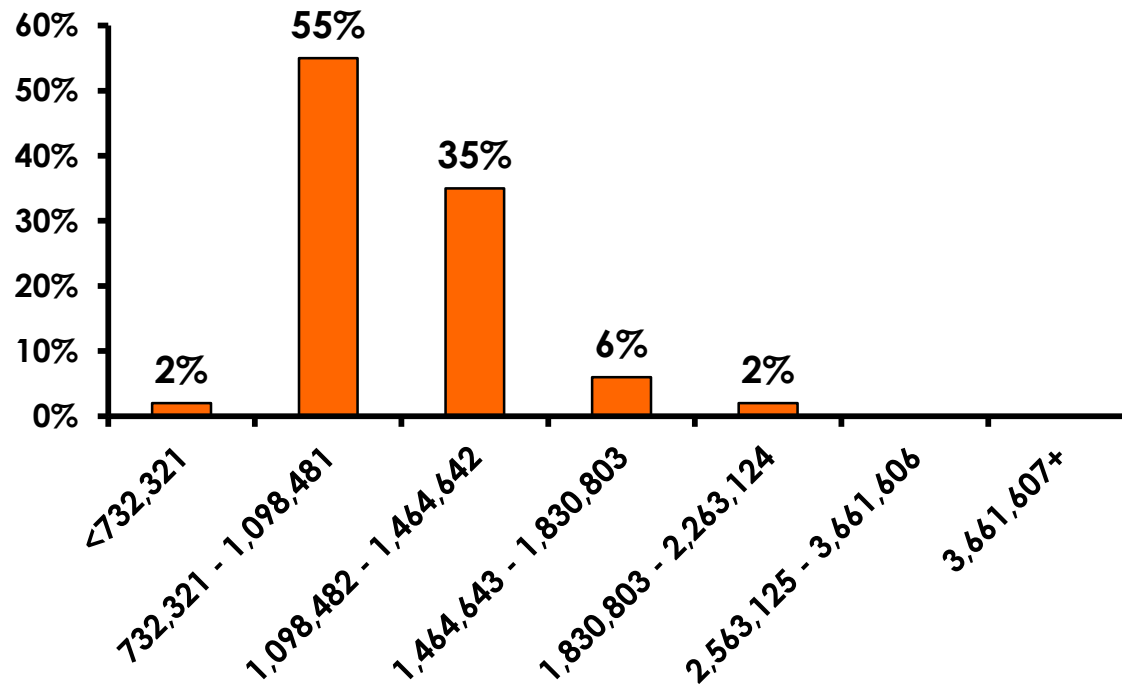
- The average age of the respondents is 39.06 years of age.

# AVERAGE - AGE



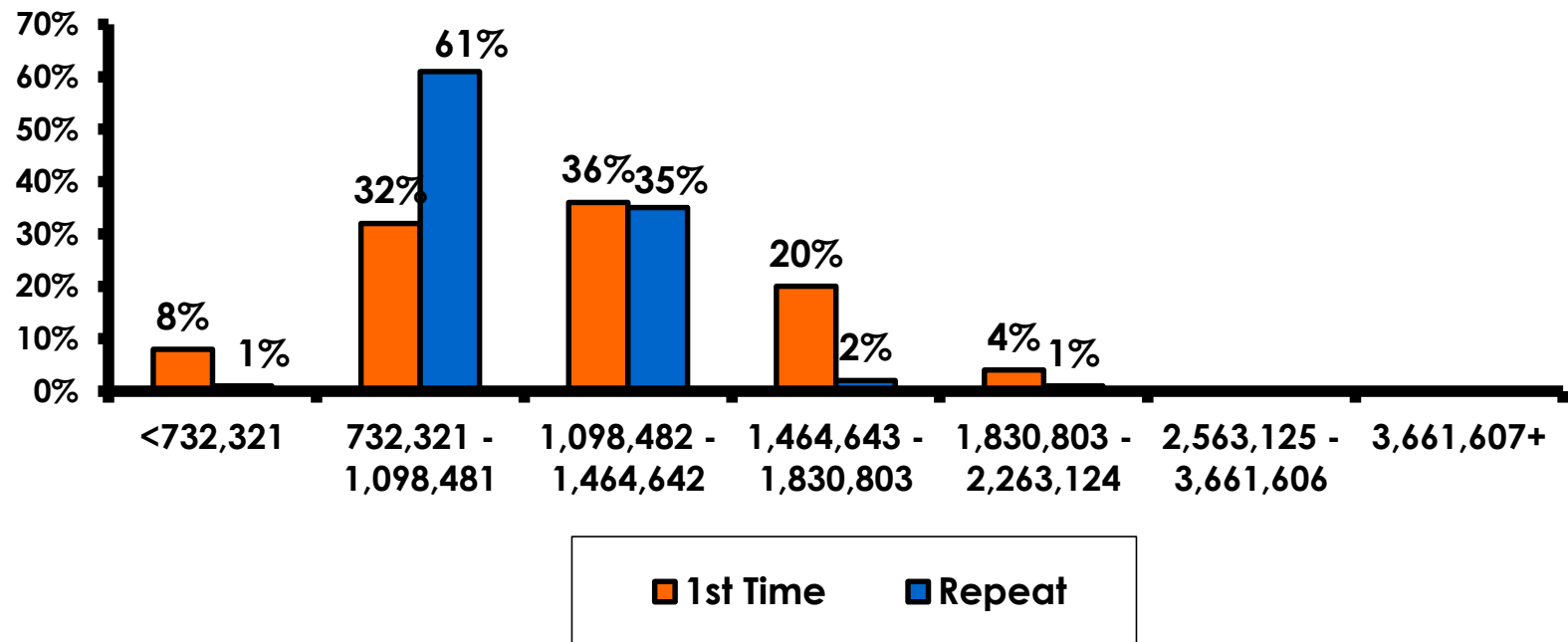


# Personal Income



- Ruble  
64.65=\$1

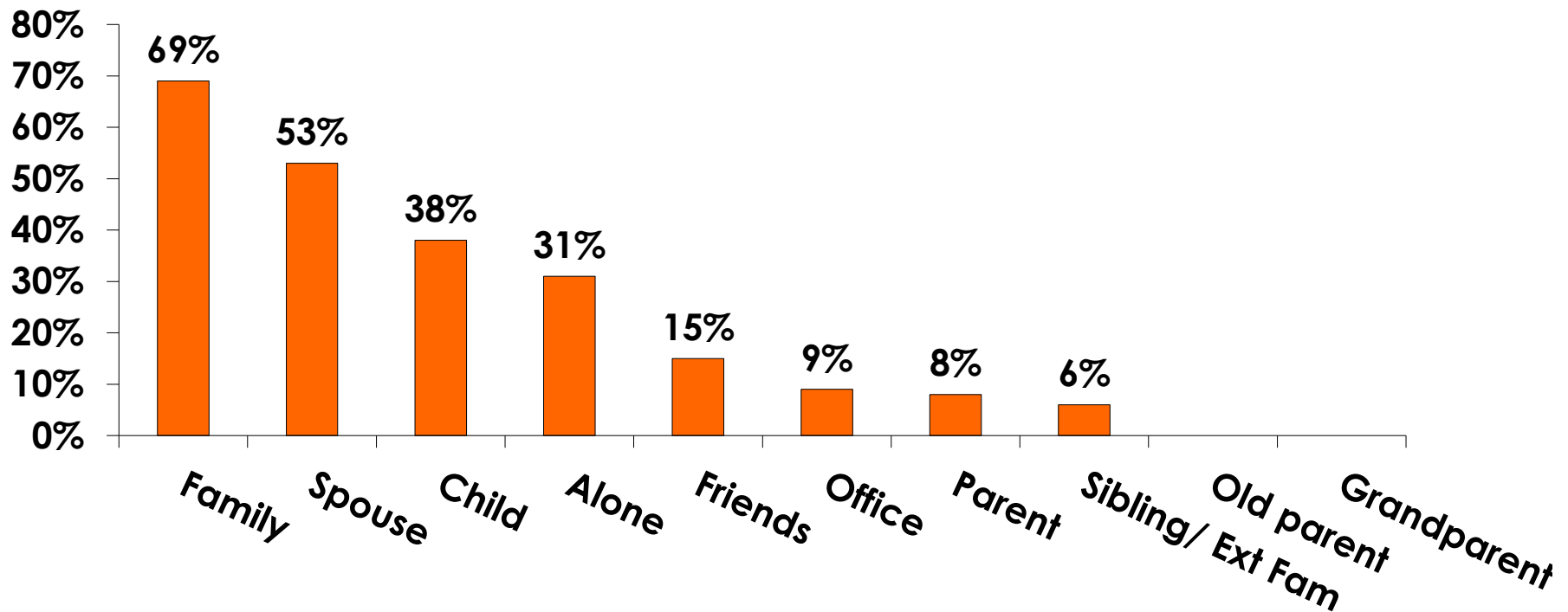
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q27	<732,321	Count	3	1	2			2	1
		Column N %	2%	2%	3%			3%	6%
	732,321-1,098,481	Count	68	28	40	4	22	34	8
		Column N %	55%	48%	62%	57%	69%	51%	47%
	1,098,482-1,464,642	Count	43	23	20	3	8	25	7
		Column N %	35%	40%	31%	43%	25%	37%	41%
	1,464,643-1,830,803	Count	7	5	2		2	4	1
		Column N %	6%	9%	3%		6%	6%	6%
	1,830,803-2,263,124	Count	2	1	1			2	
		Column N %	2%	2%	2%			3%	
	Total	Count	123	58	65	7	32	67	17

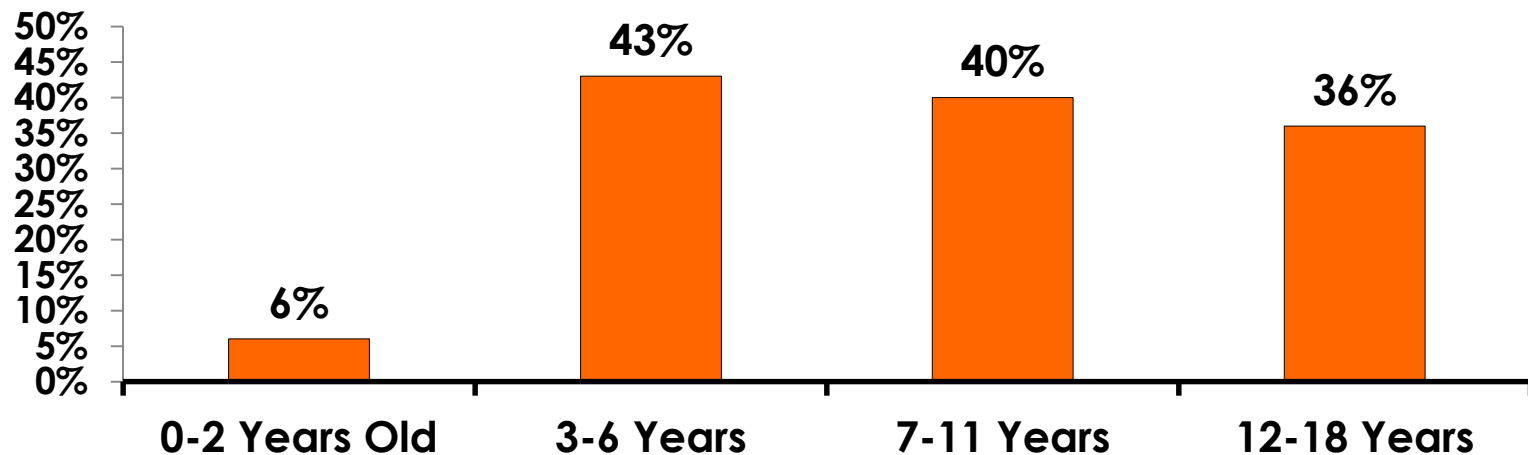
# Travel Companions



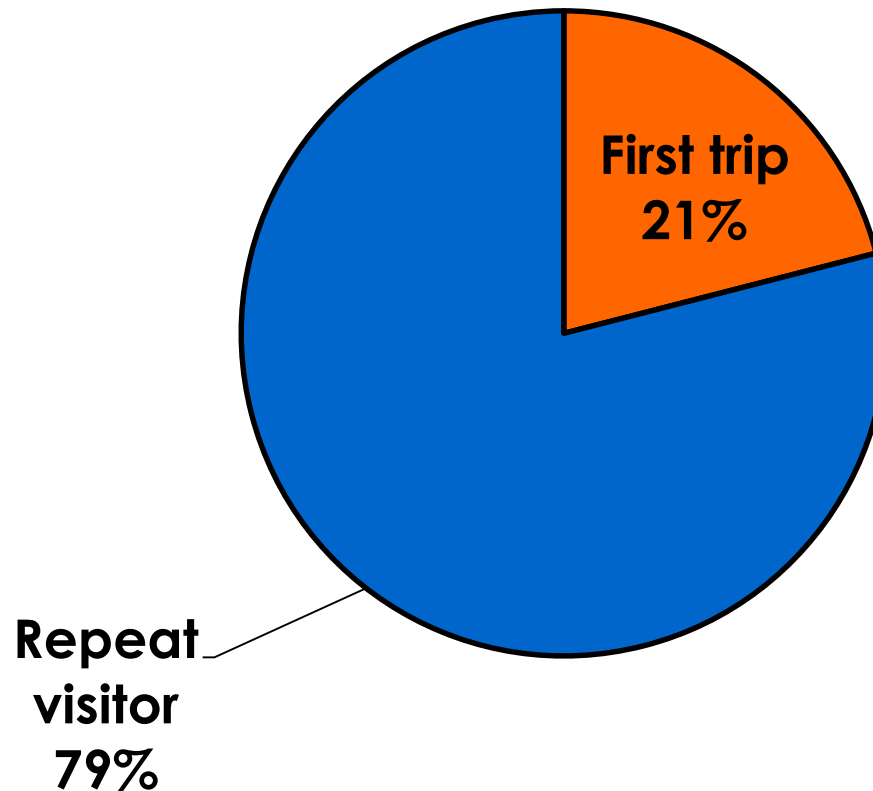
# Number of Children Travel Party

N=47 total respondents traveling with children.

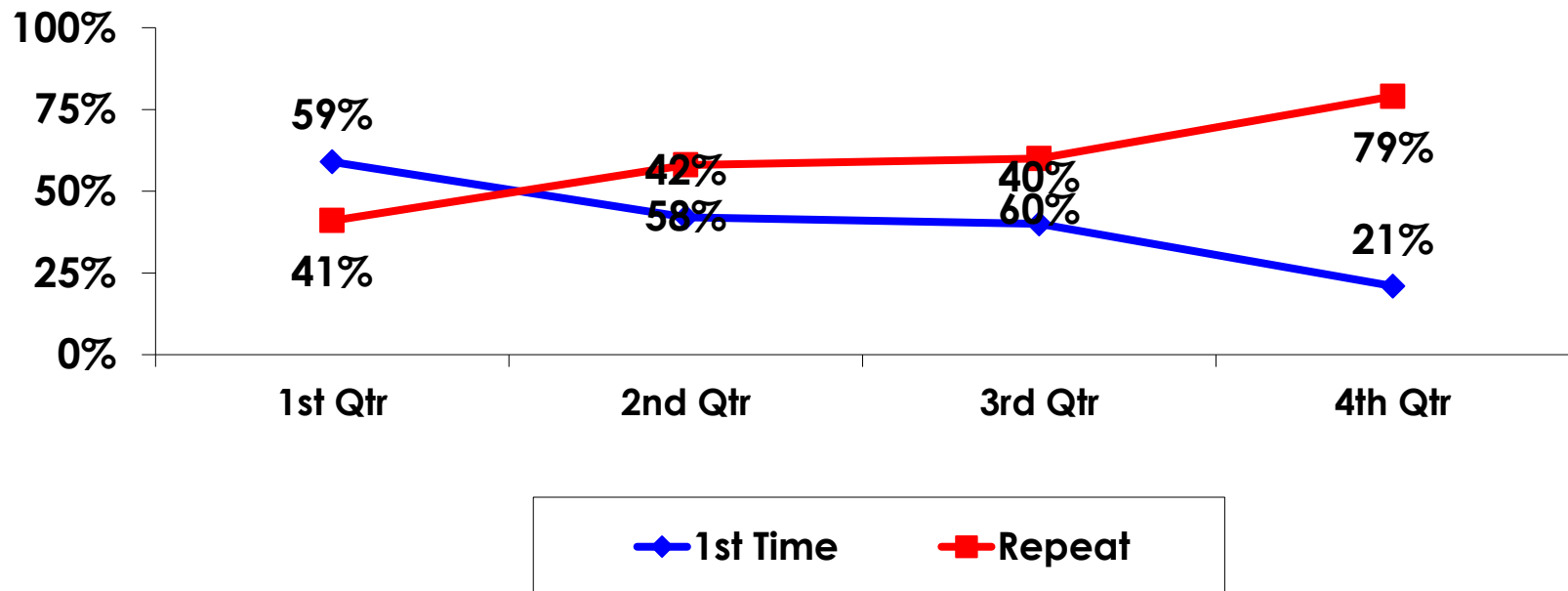
(Of those N=47 respondents, there is a total of 61 children 18 years or younger)



# Prior Trips to Guam



# PRIOR TRIPS TO GUAM



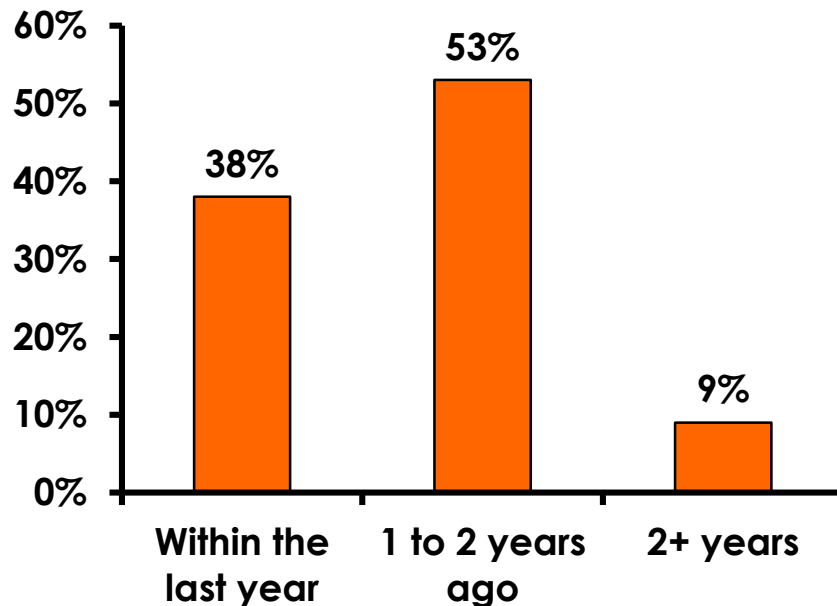
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	59	15	44
		Column N %	47%	58%	44%
	Female	Count	66	11	55
		Column N %	53%	42%	56%
AGE	Total	Count	125	26	99
	18-24	Count	8	2	6
		Column N %	6%	8%	6%
	25-34	Count	32	4	28
		Column N %	26%	15%	28%
	35-49	Count	67	16	51
		Column N %	54%	62%	52%
	50+	Count	18	4	14
		Column N %	14%	15%	14%
	Total	Count	125	26	99



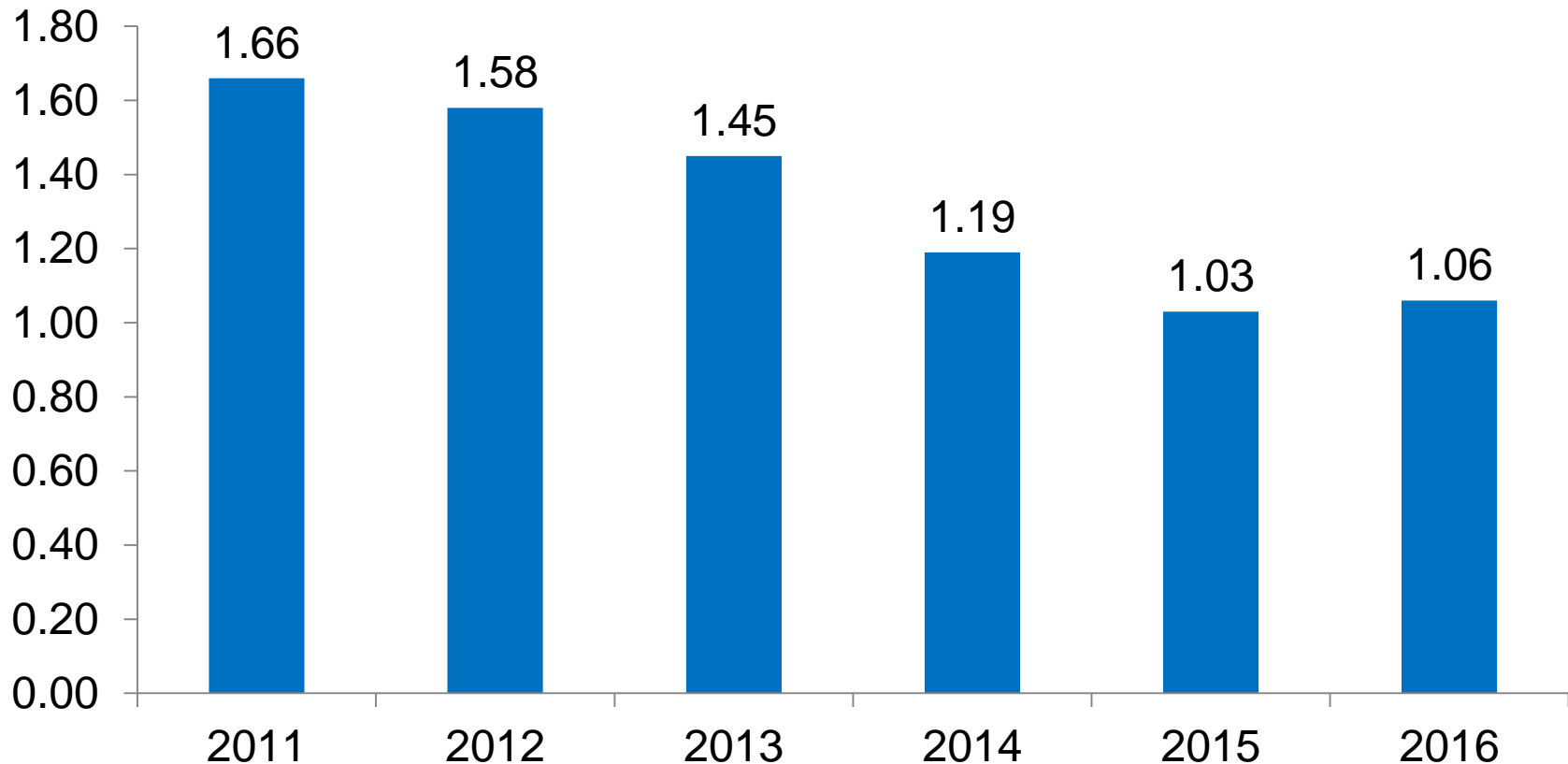
# Repeat Visitors Last Trip

n = 99



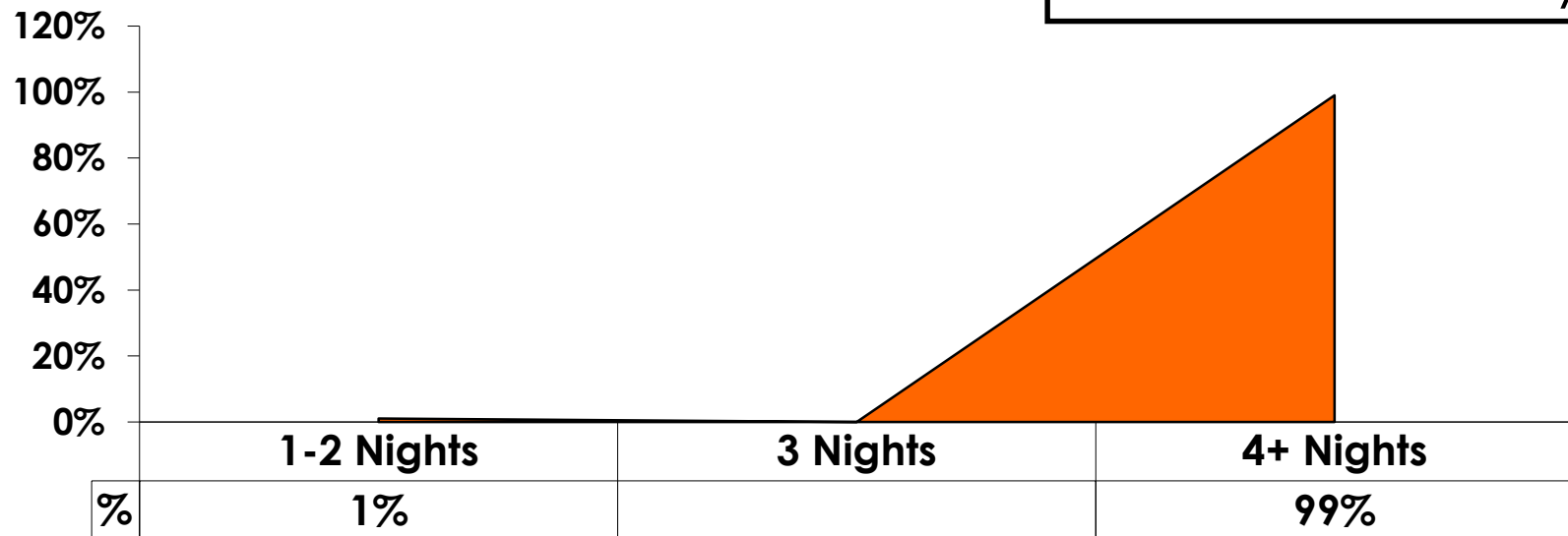
- The average repeat visitor has been to Guam 1.80 times.

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

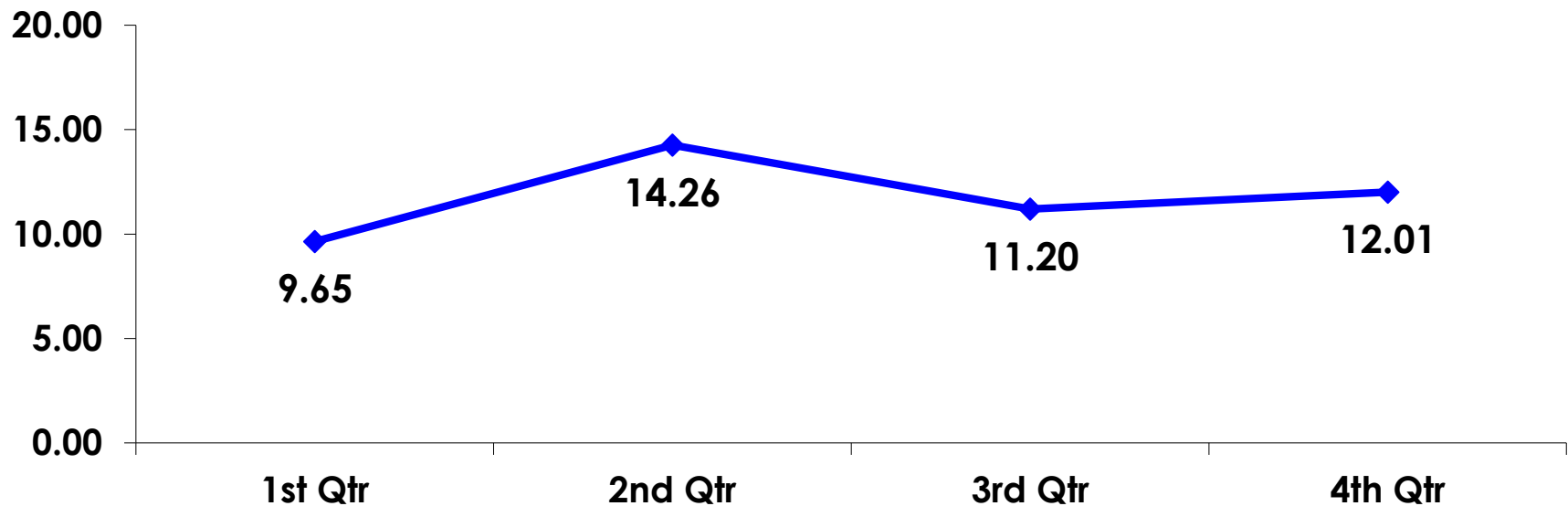


# Length of Stay

Mean = 12.01 Days  
Median = 10 Days



# AVG LENGTH OF STAY

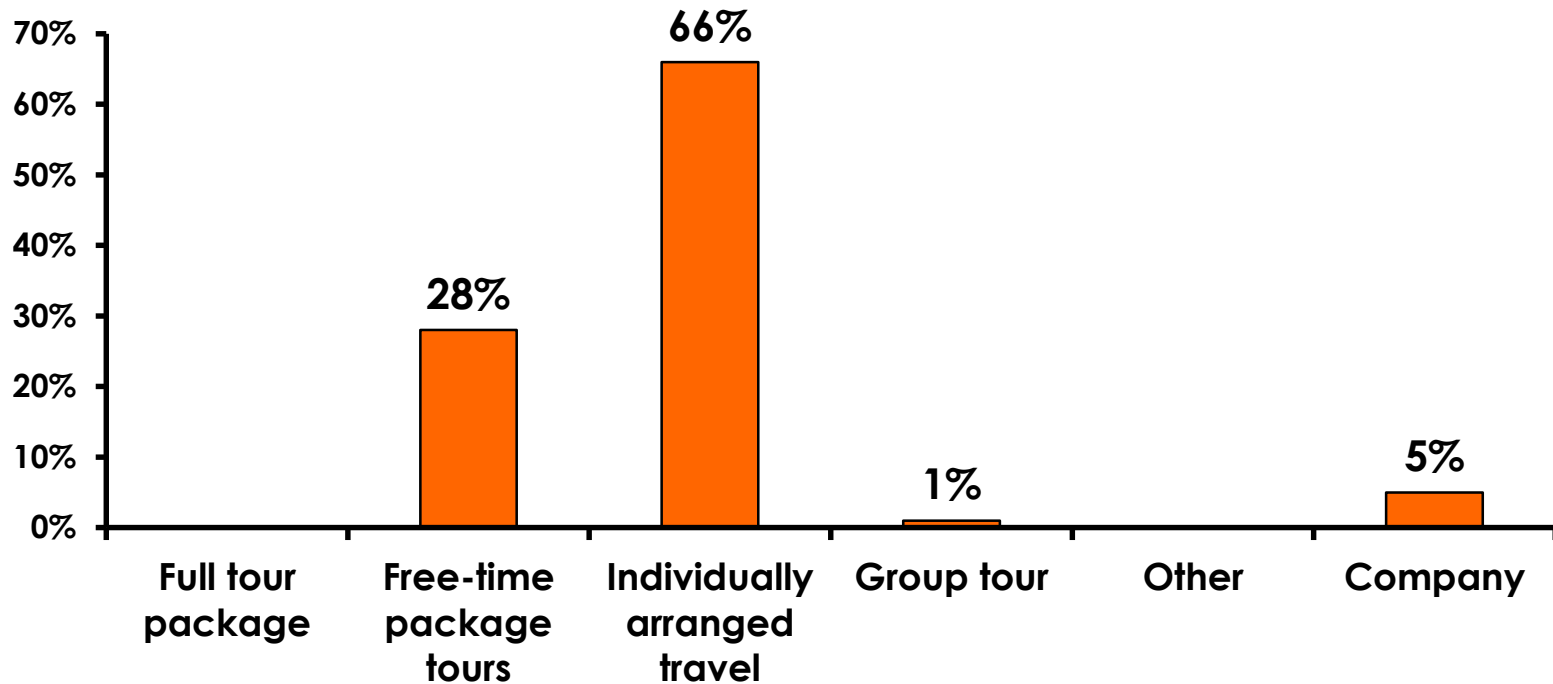


# Occupation by Income

		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	34%	33%	46%	21%	14%				
	Self-employed	23%		15%	33%	57%	50%			
	Company: Manager	13%		13%	16%					
	Company: Office/ Non-Mgr	9%		13%	5%					
	Student	6%		4%	7%					
	Homemaker	4%		1%	5%	14%	50%			
	Company: Engineer	4%		4%	2%	14%				
	Company: Exec	3%			9%					
	Retired	2%	33%							
	Teacher	2%		1%	2%					
	Freelancer	1%	33%							
	Company: Salesperson	1%		1%						
	Total Count	125	3	68	43	7	2			

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



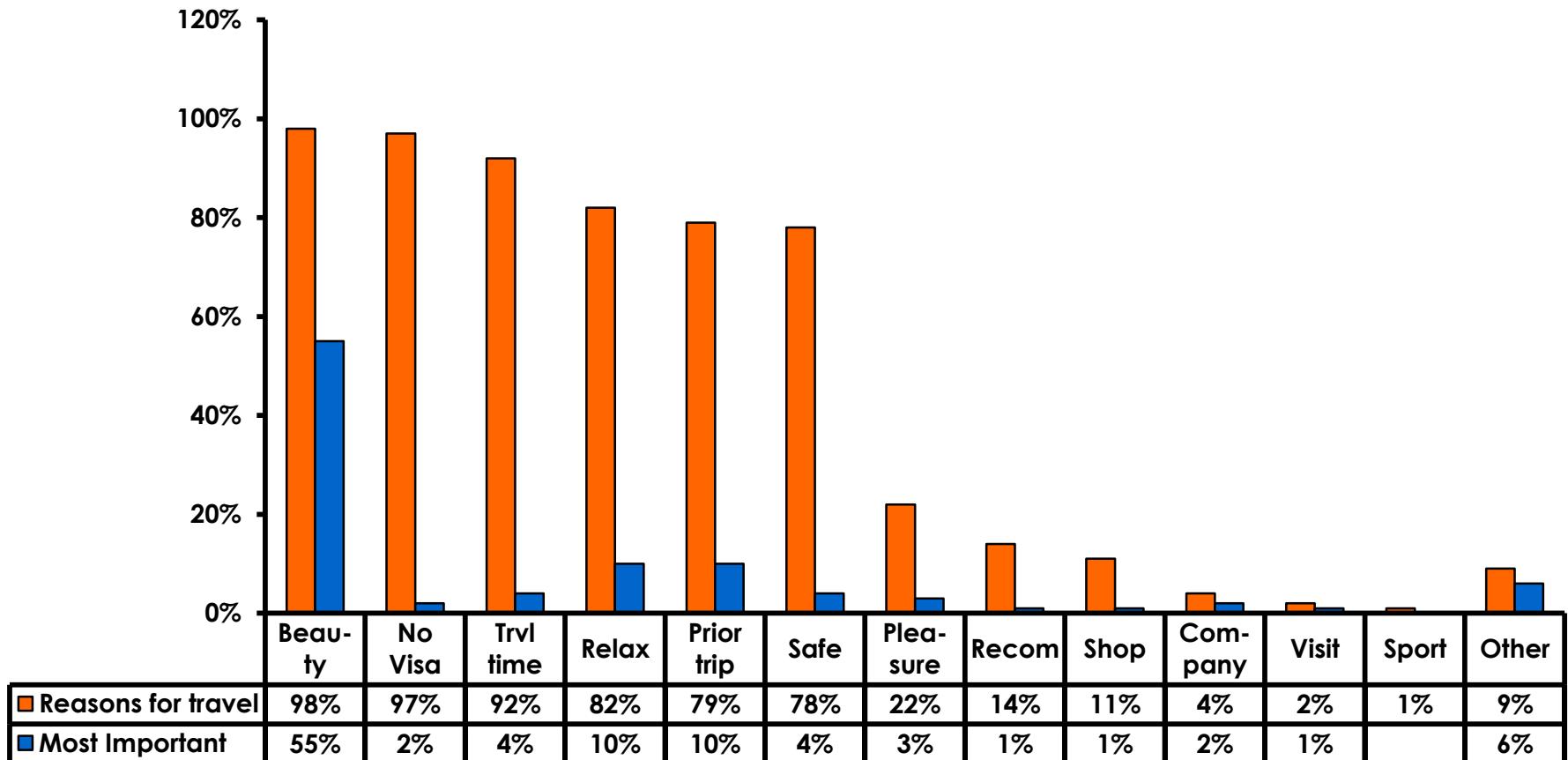
# Accommodation by Income

Average length of stay: 12.01 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+
Q9	Fiesta Resort Guam	17%		26%	5%				
	Westin Resort Guam	13%		12%	14%	17%			
	Bayview Hotel	9%		12%	7%				
	Dusit Thani Guam	7%			16%	33%			
	Apartment	7%		12%	2%				
	Tumon Bay Capital Hotel	6%		6%	9%				
	Condo	6%	33%	7%		17%	50%		
	Lotte Hotel Guam	6%		3%	12%	17%			
	PIC Club	6%		1%	16%				
	Hyatt Regency Guam	6%	33%		9%	17%	50%		
	Pacific Star Resort & Spa	5%		6%	5%				
	Hilton Guam Resort	2%		1%	5%				
	Guam Reef & Olive Spa	2%		4%					
	Home stay/ friend/ relative	2%	33%	1%					
	Guam Plaza Hotel	2%		3%					
	Outrigger Guam Resort	2%		3%					
	Oceanview Hotel	1%		1%					
	Total	Count	124	3	68	43	6	2	



# Travel Motivation - Top Responses



# **Most Important Reason for Choosing Guam**

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

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	98%	100%	100%	97%	100%	97%	100%
	No Visa required	97%	100%	100%	94%	100%	93%	100%
	Short travel time	92%	100%	91%	93%	89%	92%	92%
	Relax	82%	88%	91%	79%	78%	80%	85%
	Previous trip	79%	75%	88%	76%	78%	75%	83%
	Safe	78%	75%	75%	81%	78%	78%	79%
	Pleasure	22%	38%	25%	19%	17%	31%	14%
	Recomm- friend/family/trvl agnt	14%		13%	13%	22%	14%	14%
	Shopping	11%	13%	19%	7%	11%	7%	15%
	Other	9%		16%	7%	6%	8%	9%
	Company/ Business Trip	4%			6%	6%	5%	3%
	Visit friends/ Relatives	2%			3%		3%	
	Organized sports	1%			1%			2%
	Total	Count	125	8	32	67	18	59

# Motivation by Income

		TOTAL	Q27							
		-	<732,321	732,321-1,098,481	1,098,482-1,464,642	1,464,643-1,830,803	1,830,803-2,263,124	2,263,125-3,661,606	3,661,607+	No Income
Q5A	Natural beauty	98%	100%	99%	100%	86%	100%			
	No Visa required	97%	67%	97%	100%	86%	100%			
	Short travel time	92%	100%	88%	98%	86%	100%			
	Relax	82%	33%	88%	86%	29%	100%			
	Previous trip	79%	33%	88%	79%	29%	50%			
	Safe	78%	67%	76%	84%	86%	50%			
	Pleasure	22%		18%	23%	43%	50%			
	Recomm- friend/family/trvl agnt	14%	33%	7%	19%	29%	50%			
	Shopping	11%		13%	9%	14%				
	Other	9%	33%	3%	12%	14%	50%			
	Company/ Business Trip	4%		3%	5%	14%				
	Visit friends/ Relatives	2%		1%	2%					
	Organized sports	1%			2%					
	Total	Count	125	3	68	43	7	2		

# SECTION 3 **EXPENDITURES**

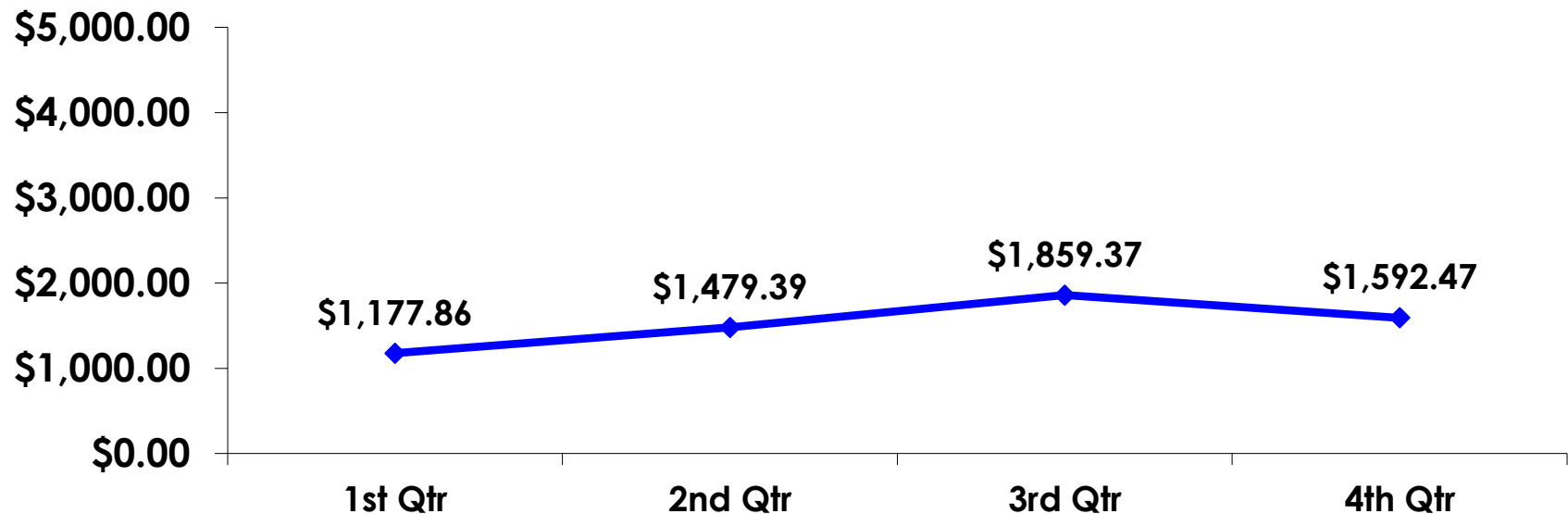
# Prepaid Expenditures

Ruble 64.65 /US\$1

- \$3,393.66 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$10,054 = maximum (highest amount recorded for the entire sample)
- \$1,592.47 = overall mean average per person prepaid expenditures

# PREPAID EXPENDITURES

## Per Person



YTD=\$1,524.36

# Breakdown of Prepaid Expenditures

## Rub 64.65=\$1

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

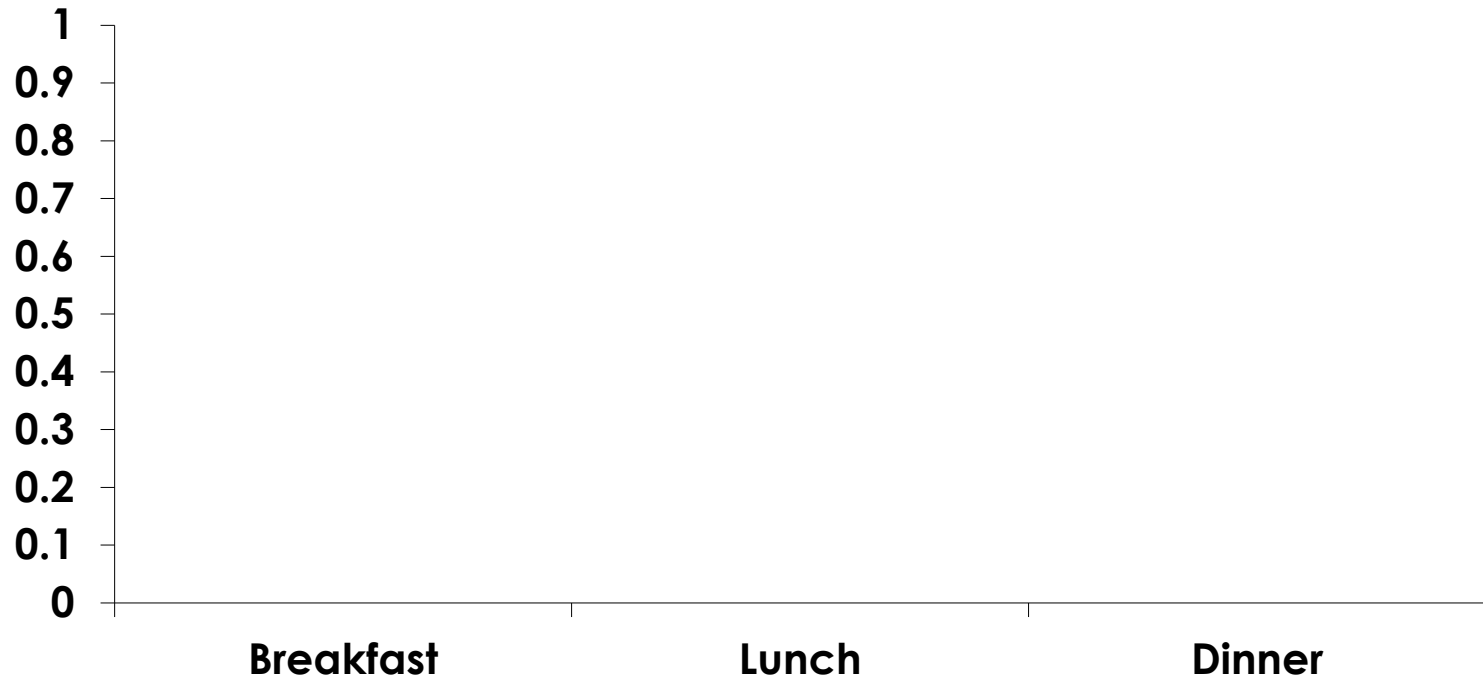
	MEAN \$
Air & Accommodation package only	\$3,562.61
Air & Accommodation w/ daily meal package	\$5,495.29
Air only	\$-
Accommodation only	\$-
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation – Russia	\$-
Ground transportation – Guam	\$-
Optional tours/ activities	\$-
Other expenses	\$-
<b>Total Prepaid</b>	<b>\$3,393.66</b>



# PREPAID MEAL BREAKDOWN

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

**n= x**

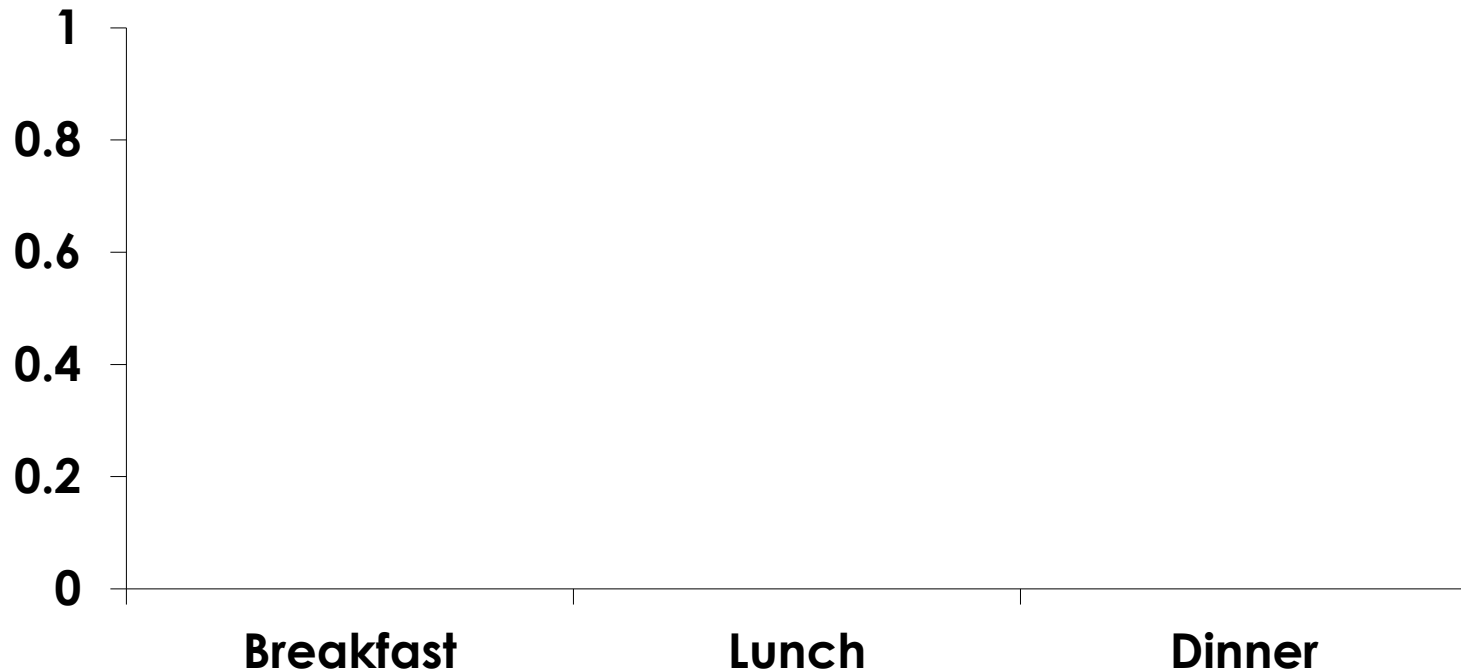


**Mean=\$5,495.29 per travel party**

# PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

**n=X**



Mean=\$x per travel party

# PREPAID GROUND TRANSPORTATION

**n=x**



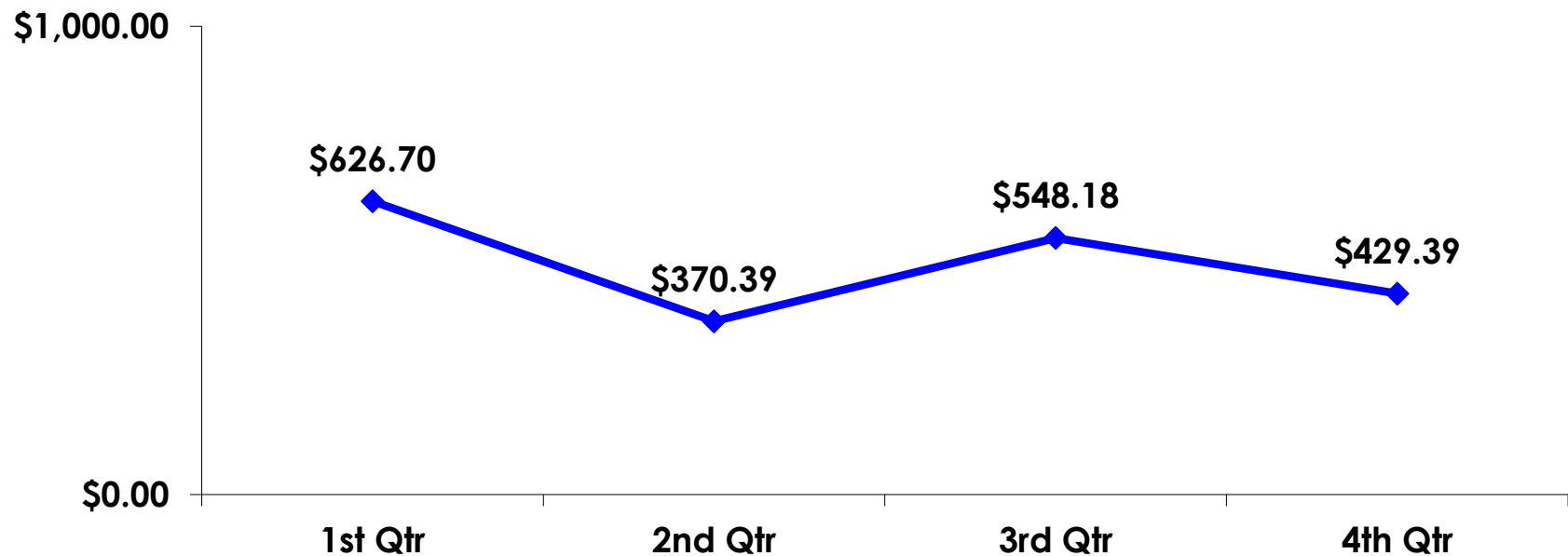
**Mean=\$xxx per travel party**

# On-Island Expenditures

- \$778.05 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,150 = Maximum (highest amount recorded for the entire sample)
- \$429.39 = overall mean average per person on-island expenditure

# ON-ISLAND EXPENDITURES

## Per Person



YTD = \$496.24

# 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	\$429.39	\$384.70	\$469.33	.	\$374.05	\$382.29	\$404.54	\$337.50	\$525.15	\$434.68	\$523.89
	Median	\$350	\$333	\$424	.	\$367	\$313	\$410	\$300	\$400	\$375	\$550
	Minimum	\$0	\$167	\$0	.	\$200	\$167	\$200	\$0	\$170	\$183	\$0
	Maximum	\$1,240	\$900	\$1,240	.	\$500	\$900	\$800	\$1,000	\$1,240	\$1,000	\$720

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$91.99	\$101.10	\$83.85	\$21.25	\$108.91	\$93.79	\$86.67
	Median	\$60	\$90	\$60	\$0	\$78	\$60	\$110
F&B FF/STORE	Mean	\$89.52	\$111.69	\$69.70	\$15.00	\$78.59	\$99.25	\$105.83
	Median	\$75	\$100	\$70	\$0	\$75	\$100	\$83
F&B RESTRNT	Mean	\$105.72	\$119.07	\$93.79	\$32.50	\$122.81	\$108.58	\$97.22
	Median	\$80	\$100	\$78	\$0	\$100	\$90	\$55
OPT TOUR	Mean	\$75.36	\$87.12	\$64.85	\$85.00	\$45.31	\$88.21	\$76.67
	Median	\$0	\$0	\$0	\$50	\$0	\$0	\$25
GIFT- SELF	Mean	\$193.40	\$192.80	\$193.94	\$135.00	\$243.13	\$190.67	\$141.11
	Median	\$160	\$180	\$155	\$140	\$200	\$150	\$120
GIFT- OTHER	Mean	\$55.92	\$48.31	\$62.73	\$25.00	\$81.72	\$39.18	\$86.11
	Median	\$50	\$50	\$50	\$0	\$80	\$25	\$70
TRANS	Mean	\$137.14	\$197.71	\$82.98	\$22.50	\$113.81	\$150.60	\$179.44
	Median	\$80	\$200	\$45	\$0	\$60	\$120	\$175
OTHER	Mean	\$29.00	\$30.68	\$27.50	\$1.25	\$44.06	\$26.04	\$25.56
	Median	\$0	\$0	\$0	\$0	\$25	\$0	\$5
TOTAL	Mean	\$778.05	\$888.47	\$679.33	\$337.50	\$838.34	\$796.33	\$798.61
	Median	\$700	\$850	\$600	\$300	\$900	\$700	\$760

# On-Island Expenditures

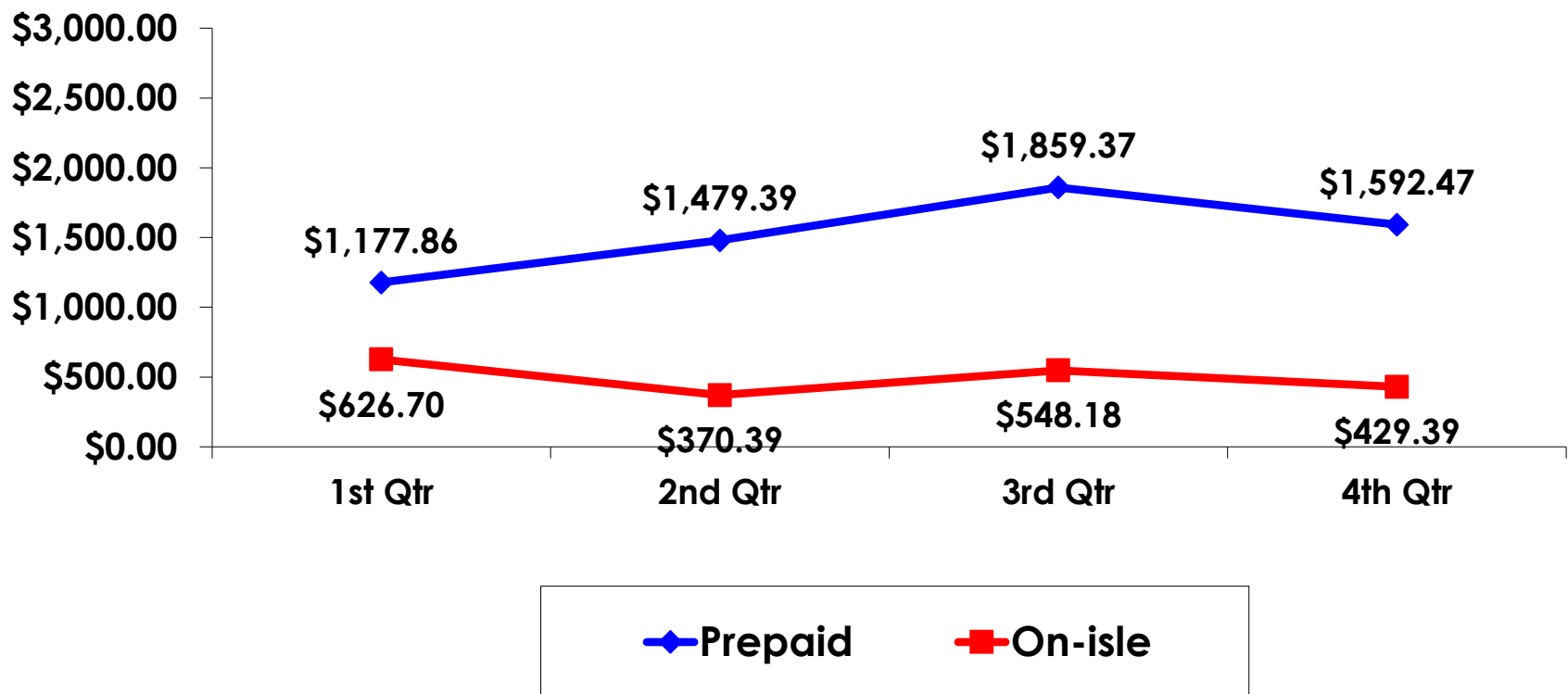
## First Timers vs. Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$91.99	\$55.00	\$101.71
	Median	\$60	\$38	\$80
F&B FF/STORE	Mean	\$89.52	\$76.35	\$92.98
	Median	\$75	\$75	\$80
F&B RESTRNT	Mean	\$105.72	\$115.00	\$103.28
	Median	\$80	\$120	\$80
OPT TOUR	Mean	\$75.36	\$156.54	\$54.04
	Median	\$0	\$135	\$0
GIFT- SELF	Mean	\$193.40	\$210.96	\$188.79
	Median	\$160	\$200	\$150
GIFT- OTHER	Mean	\$55.92	\$65.19	\$53.48
	Median	\$50	\$50	\$50
TRANS	Mean	\$137.14	\$124.04	\$140.58
	Median	\$80	\$60	\$80
OTHER	Mean	\$29.00	\$15.38	\$32.58
	Median	\$0	\$0	\$0
TOTAL	Mean	\$778.05	\$818.46	\$767.43
	Median	\$700	\$935	\$700



# PREPAID/ ON-ISLE EXPENDITURES – Per Person

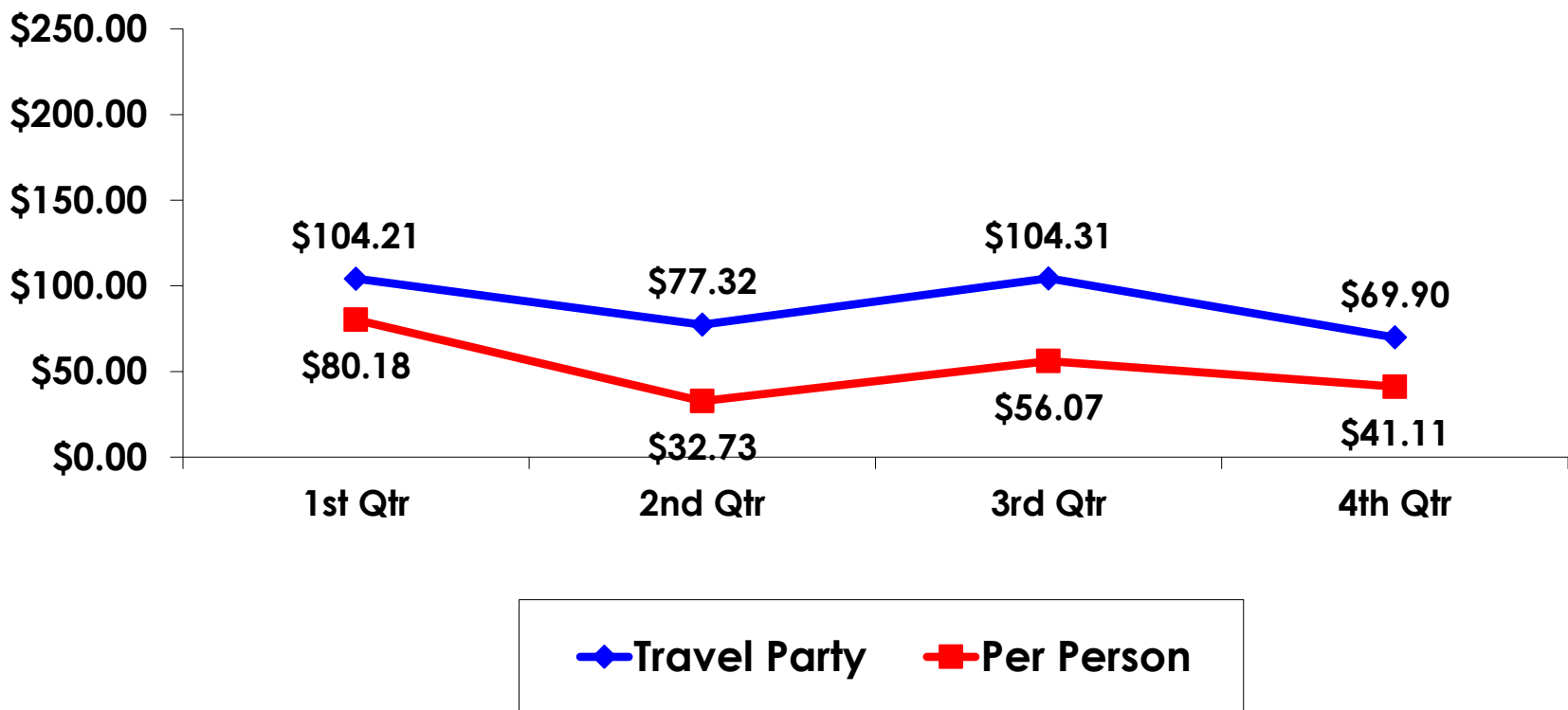
Prepaid YTD = \$1,524.36    On-Isle YTD = \$496.24



# ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$89.73

Per Person YTD = \$53.04

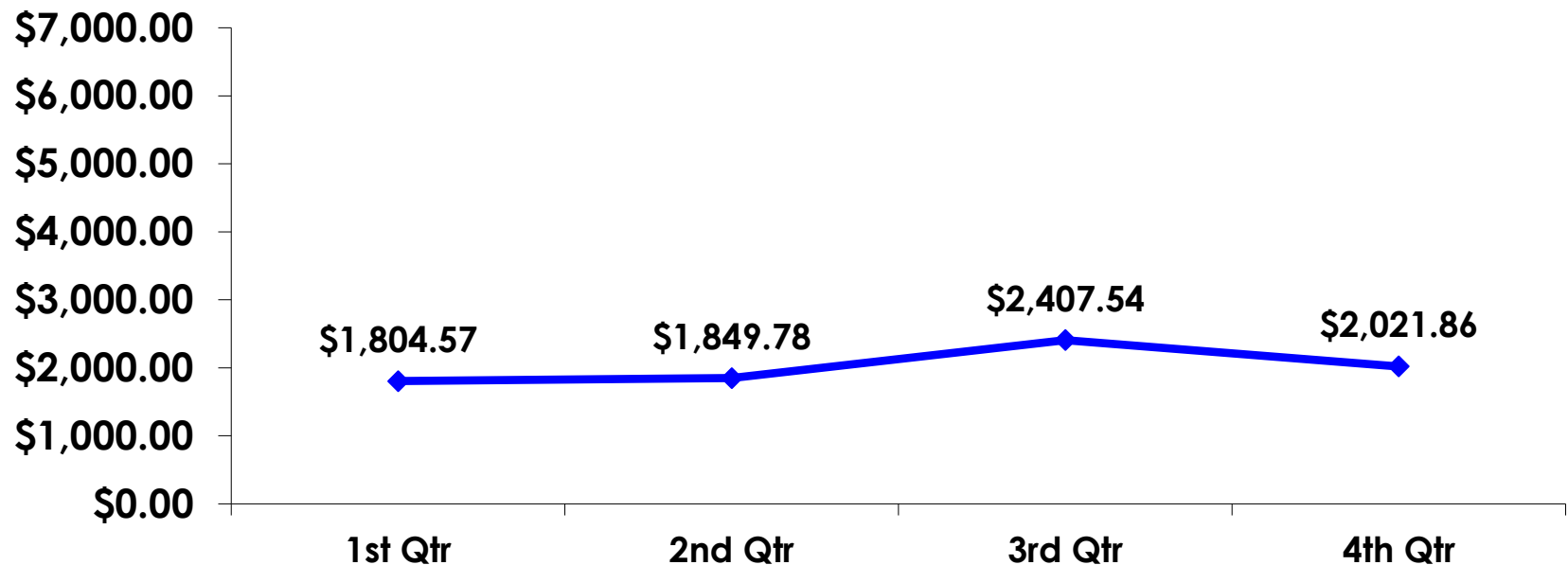


# Total Expenditures Per Person (Prepaid & On-Island)

- \$2,021.86 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,384 = Maximum (highest amount recorded for the entire sample)

# TOTAL EXPENDITURES

## Per Person



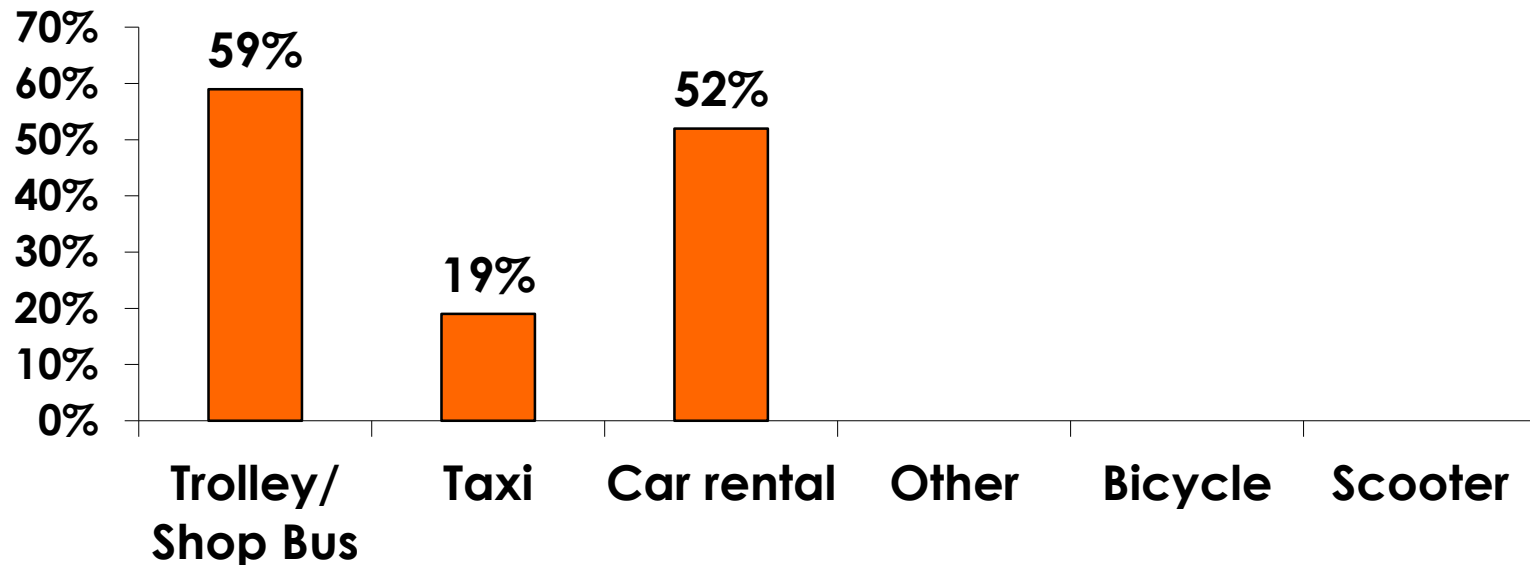
YTD=\$2,020.60

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$91.99
Food & beverage in fast food restaurant/convenience store	\$89.52
Food & beverage at restaurants or drinking establishments outside a hotel	\$105.72
Optional tours and activities	\$75.36
Gifts/ souvenirs for yourself/companions	\$193.40
Gifts/ souvenirs for friends/family at home	\$55.92
Local transportation	\$137.14
Other expenses not covered	\$29.00
<b>Average Total</b>	<b>\$778.05</b>

# Local Transportation

n=101



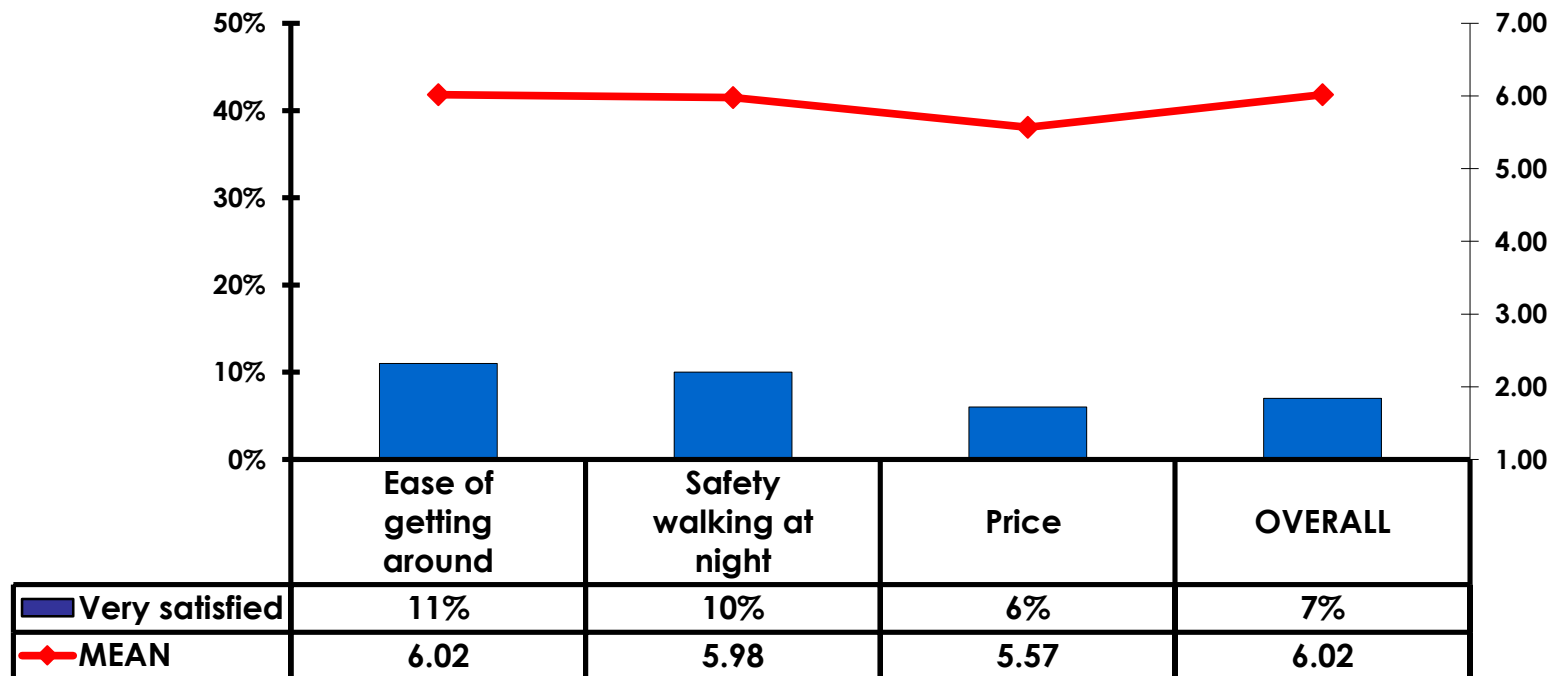
Mean=\$137.14 per travel party

# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied

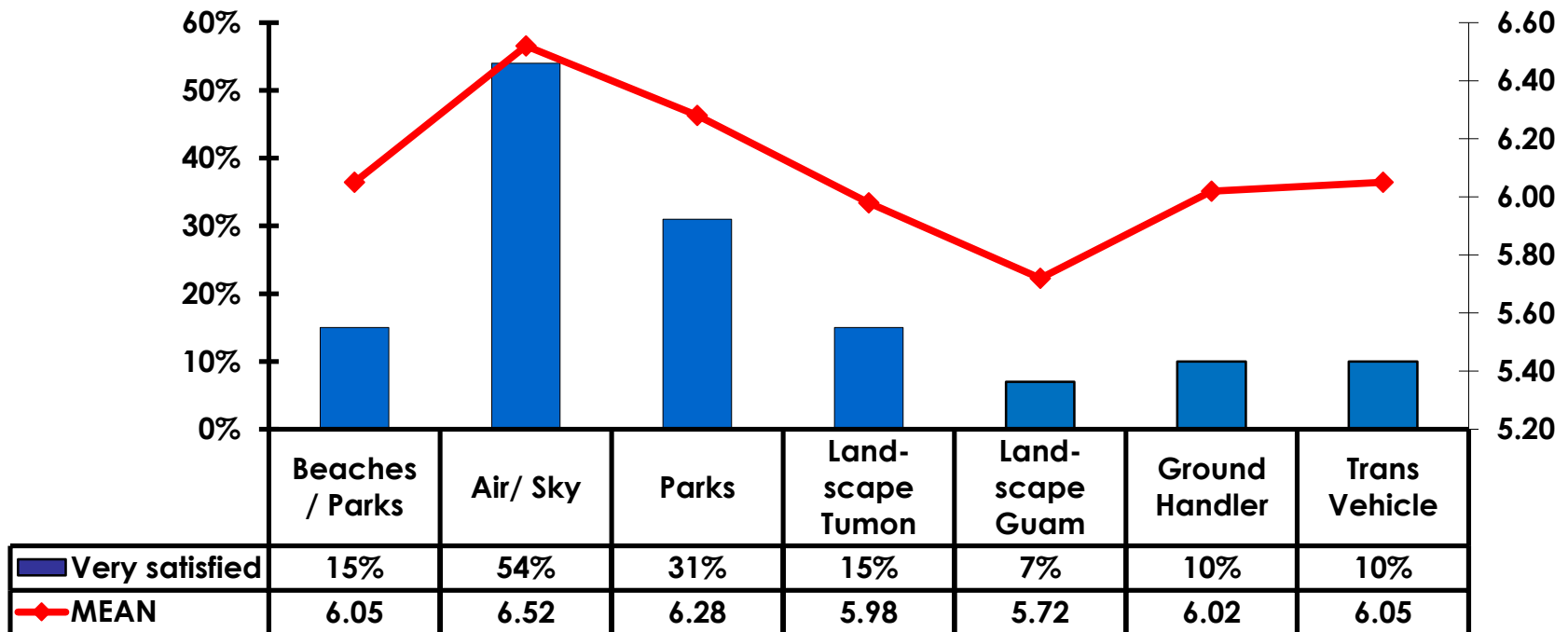




# Satisfaction Quality/ Cleanliness

7pt Rating Scale

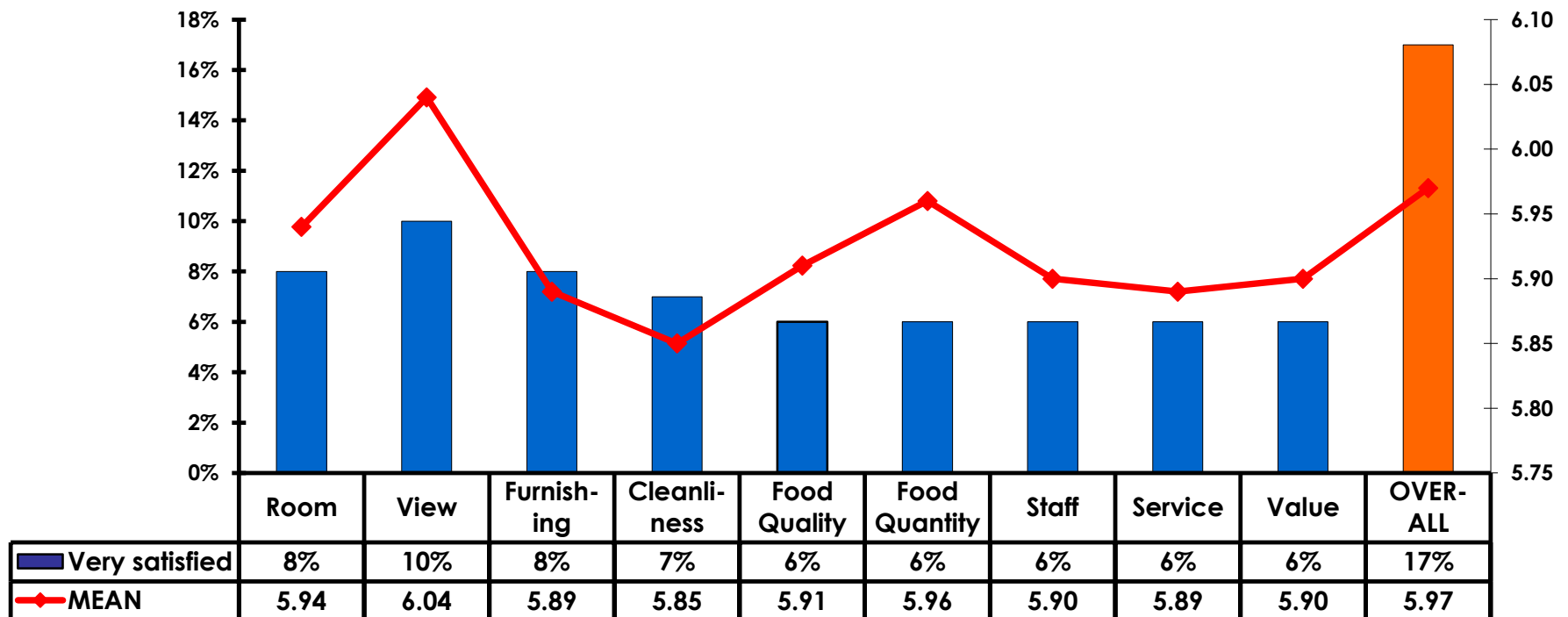
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

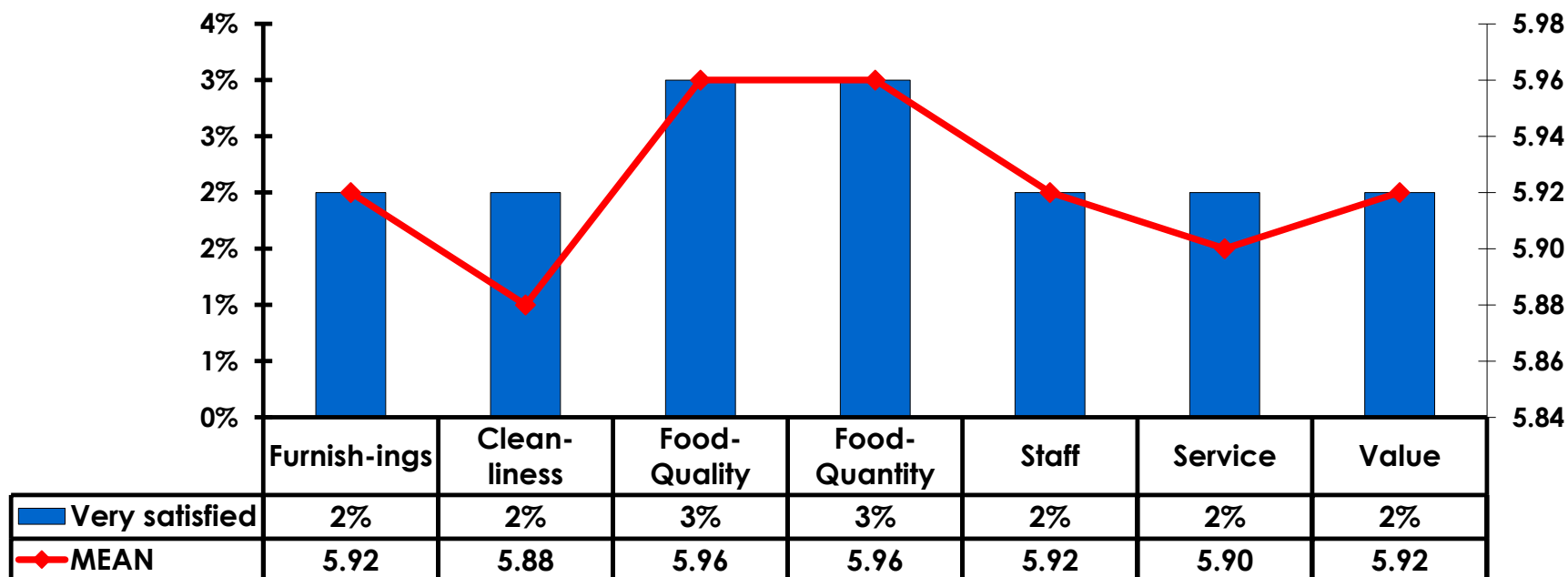
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

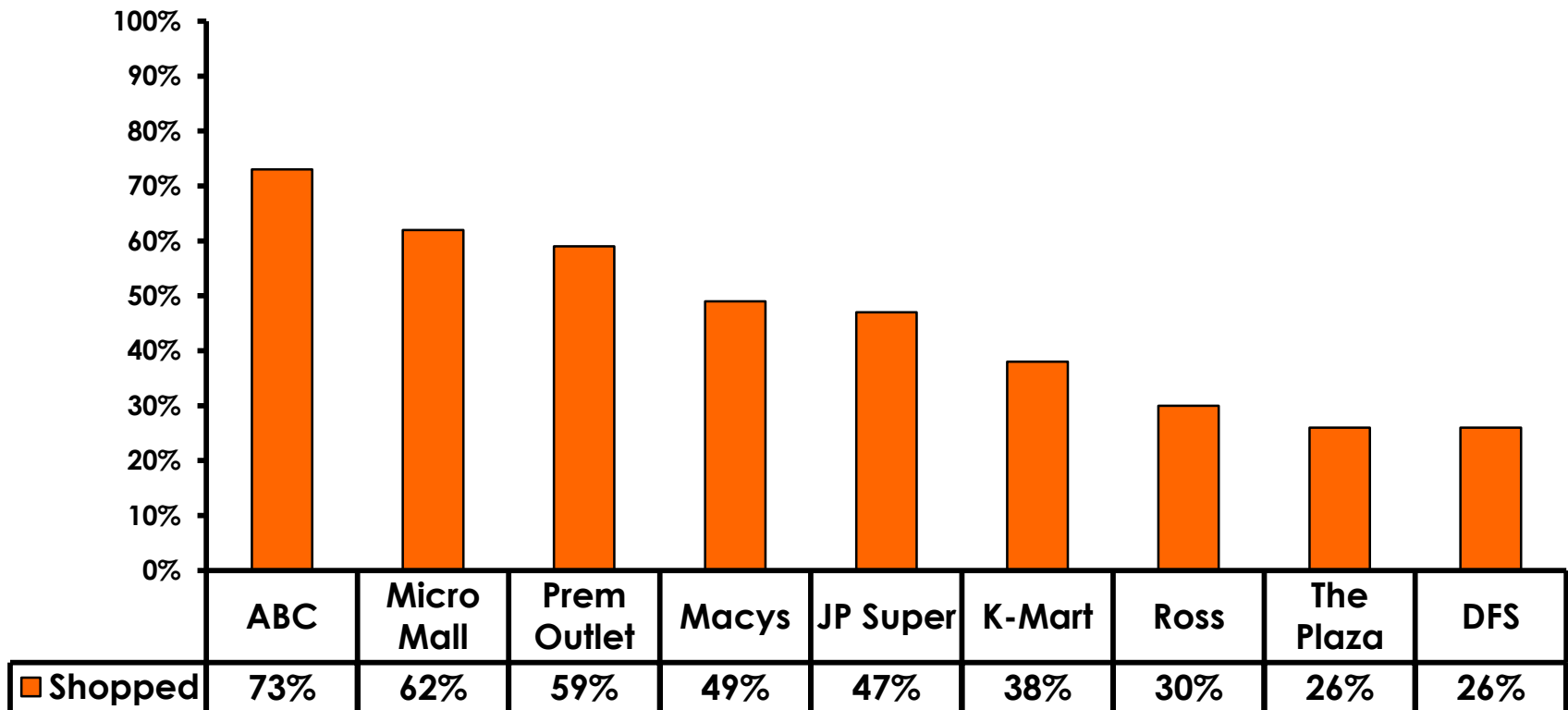
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



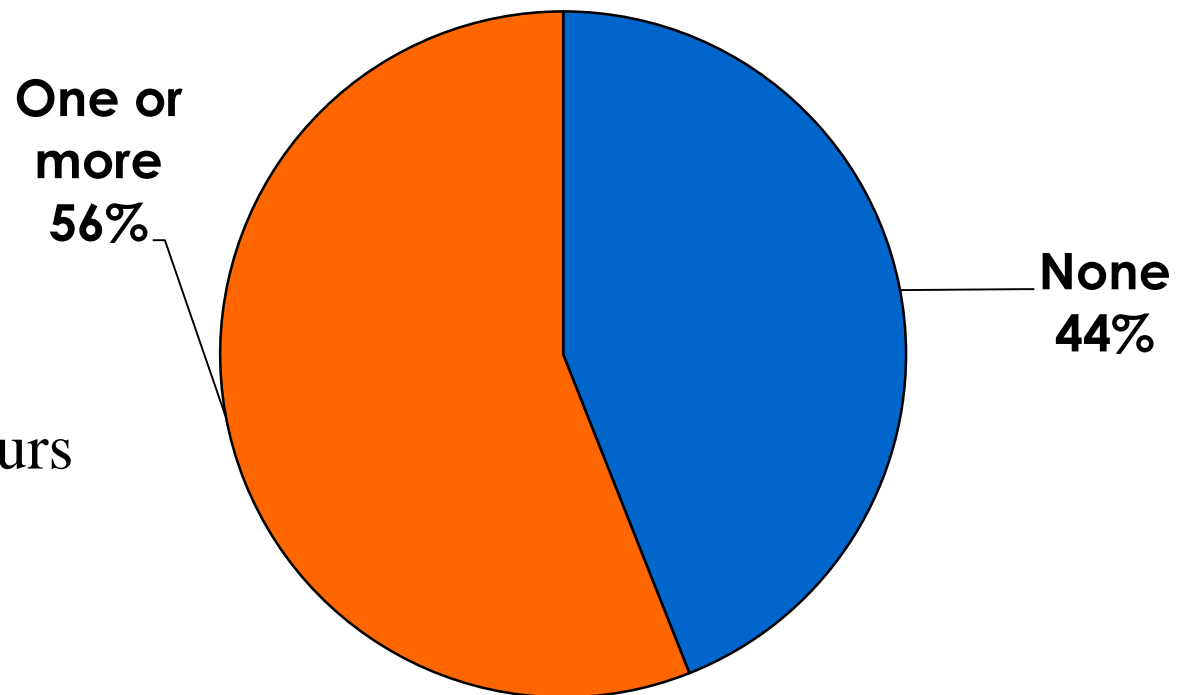
# Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>50%</b>	Score of 6 to 7 = <b>42%</b>
Score of 4 to 5 = <b>50%</b>	Score of 4 to 5 = <b>58%</b>
Score 1 to 3 = %	Score 1 to 3 = %
<b>MEAN = 5.51</b>	<b>MEAN = 5.43</b>

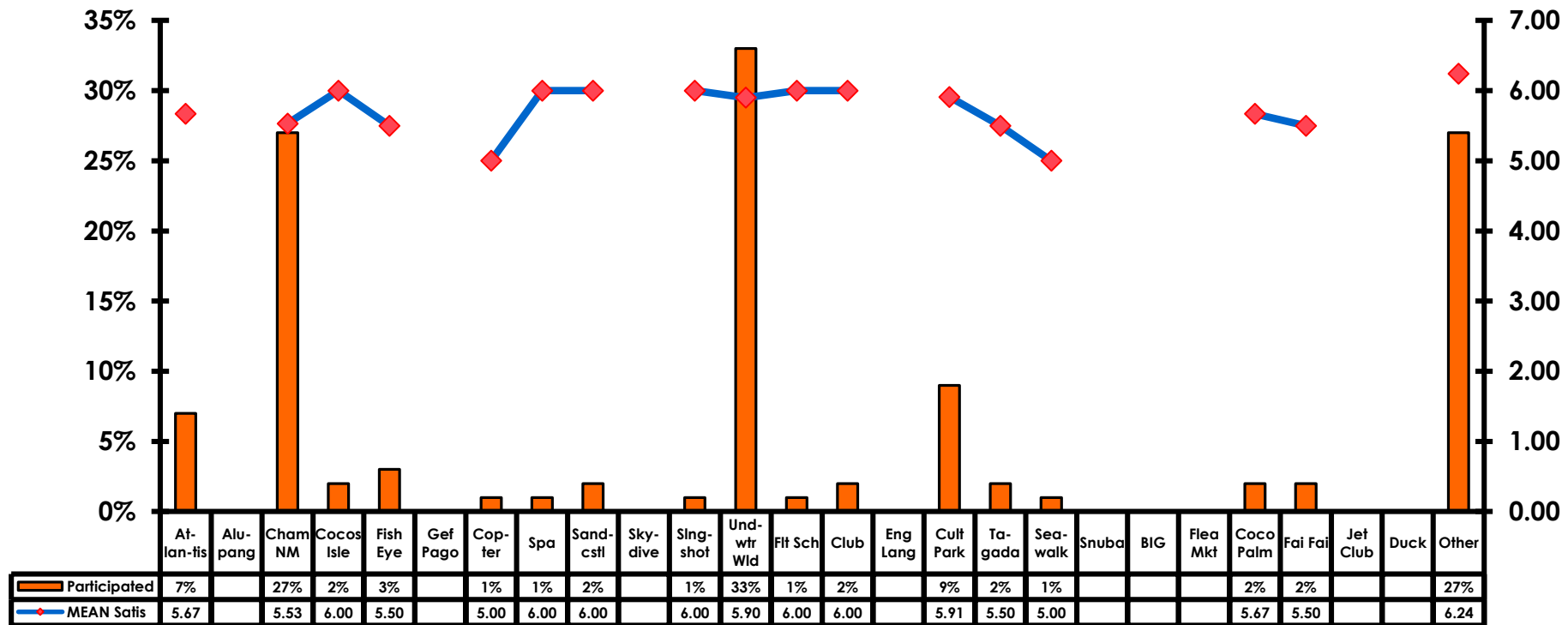
# Optional Tour Participation



- Average number of tours participated in is 1.75

# Optional Tours

## Participation & Satisfaction



# Day Tours Satisfaction

**7pt Rating Scale**

**7=Very Satisfied/ 1=Very Dissatisfied**

<b>Quality of Day Tour</b>	<b>Variety of Day Tour</b>
Score of 6 to 7 = <b>90%</b>	Score of 6 to 7 = <b>61%</b>
Score of 4 to 5 = <b>10%</b>	Score of 4 to 5 = <b>38%</b>
Score 1 to 3 = <b>-%</b>	Score 1 to 3 = <b>-%</b>
<b>MEAN = 6.02</b>	<b>MEAN = 5.65</b>



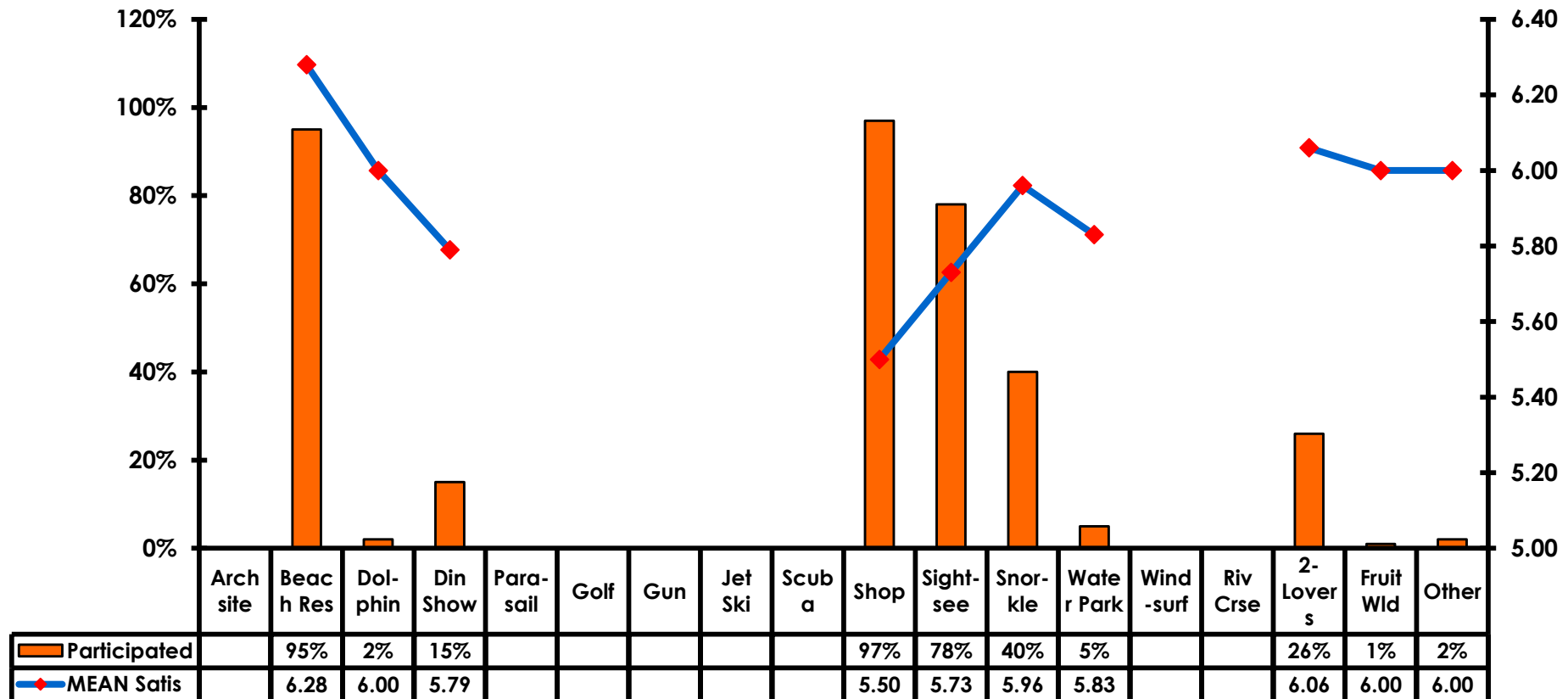
# Night Tours Satisfaction

**7pt Rating Scale**

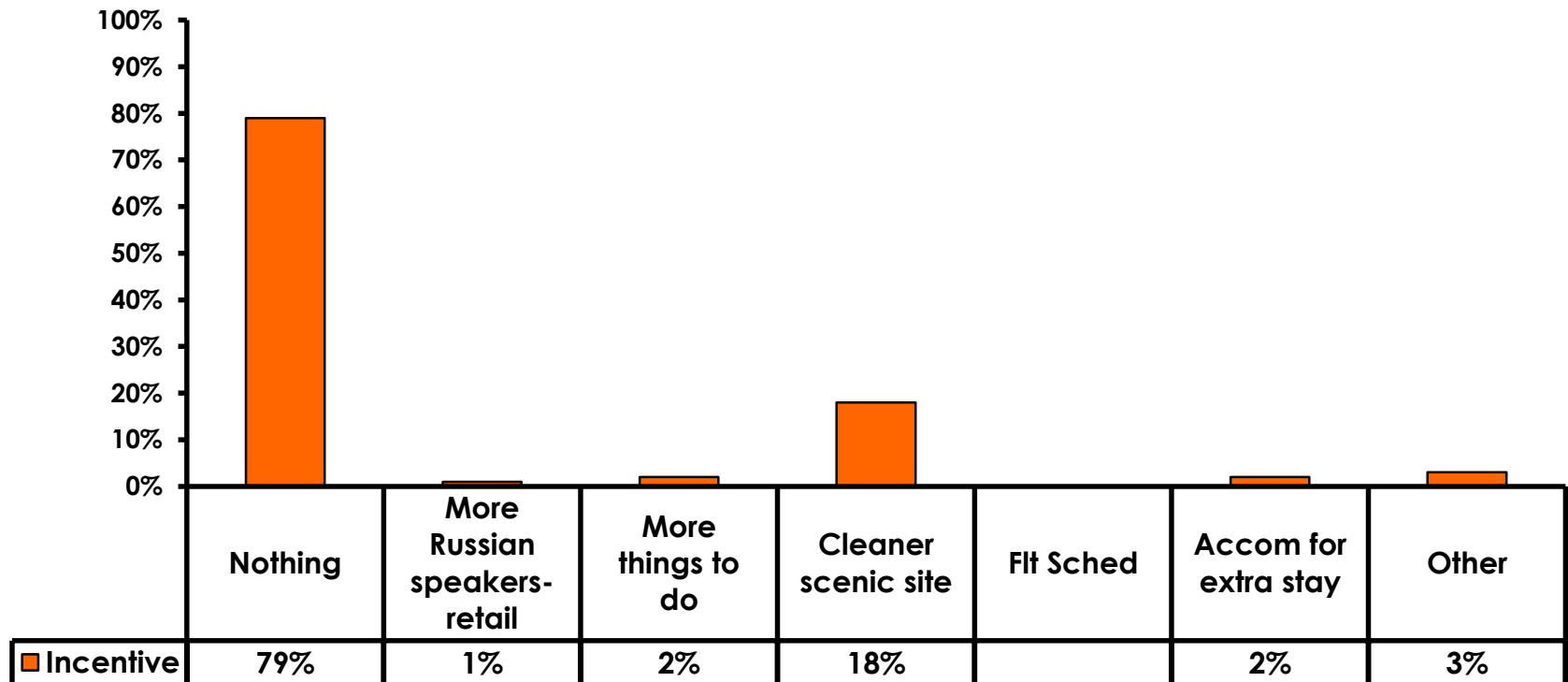
**7=Very Satisfied/ 1=Very Dissatisfied**

<b>Quality of Night Tour</b>	<b>Variety of Night Tour</b>
Score of 6 to 7 = <b>93%</b>	Score of 6 to 7 = <b>94%</b>
Score of 4 to 5 = <b>7%</b>	Score of 4 to 5 = <b>6%</b>
Score 1 to 3 = <b>-%</b>	Score 1 to 3 = <b>-%</b>
<b>MEAN = 5.53</b>	<b>MEAN = 5.38</b>

# Satisfaction with Other Activities



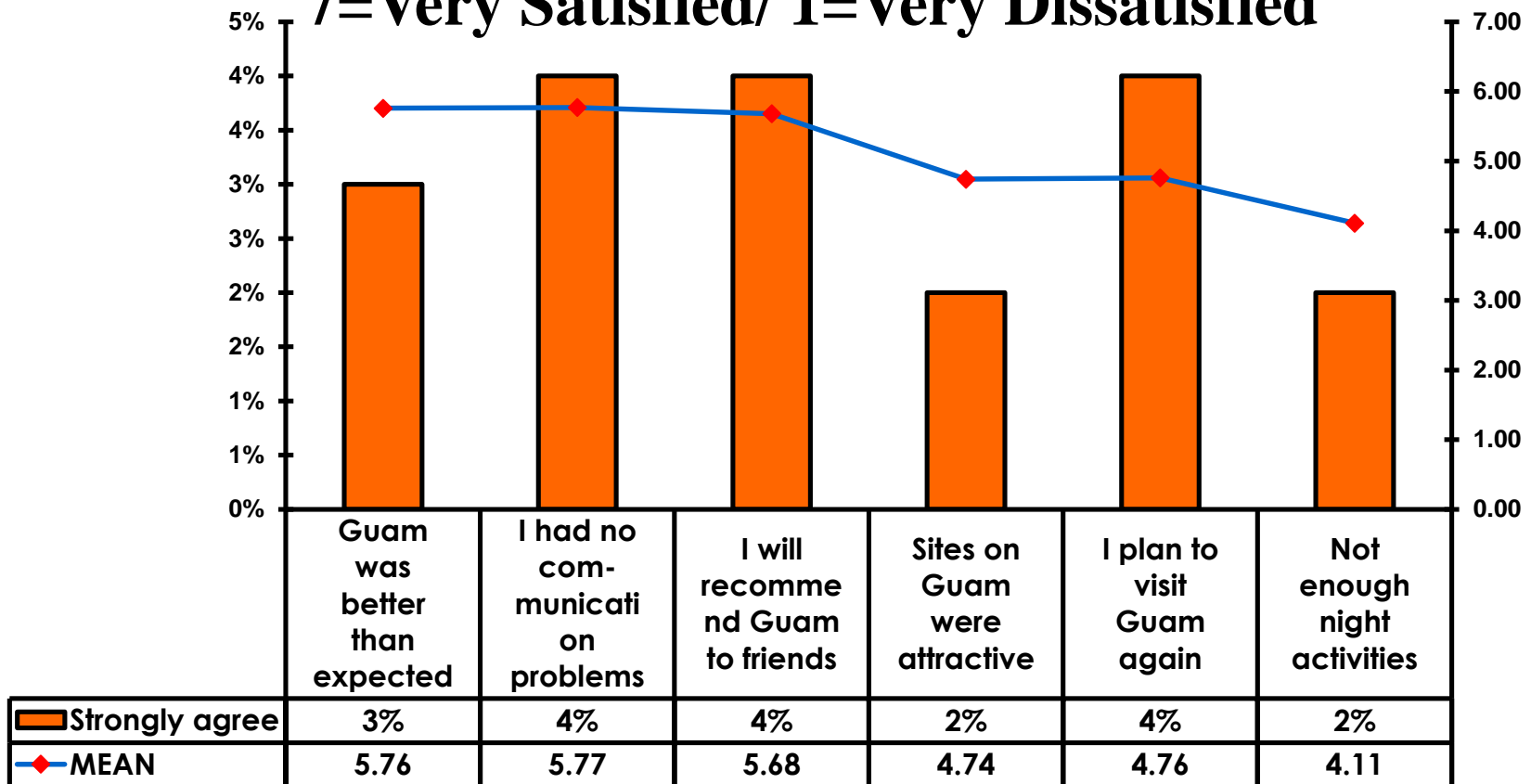
# What would it take to make Guam more enjoyable for families?



# On-Island Perceptions

7pt Rating Scale

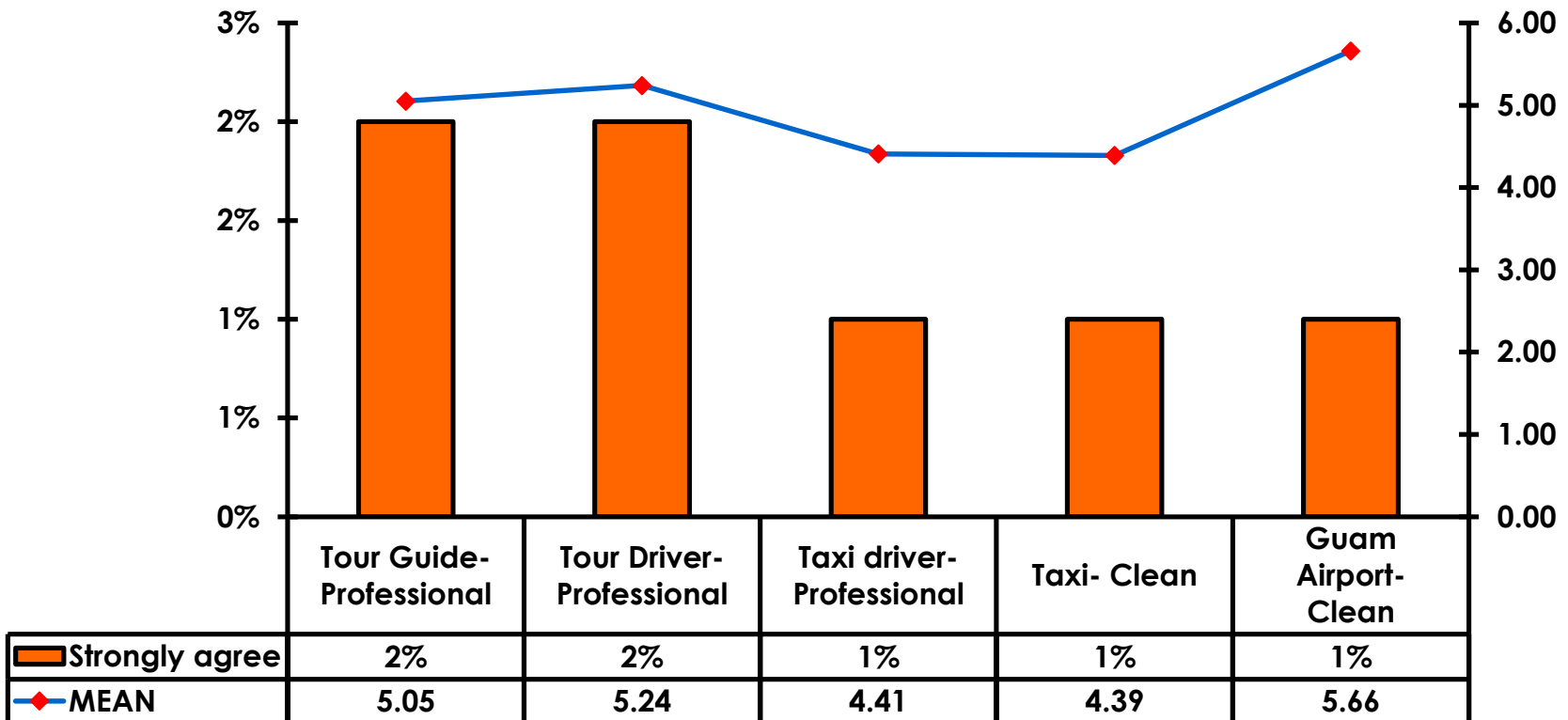
7=Very Satisfied/ 1=Very Dissatisfied



# Transportation

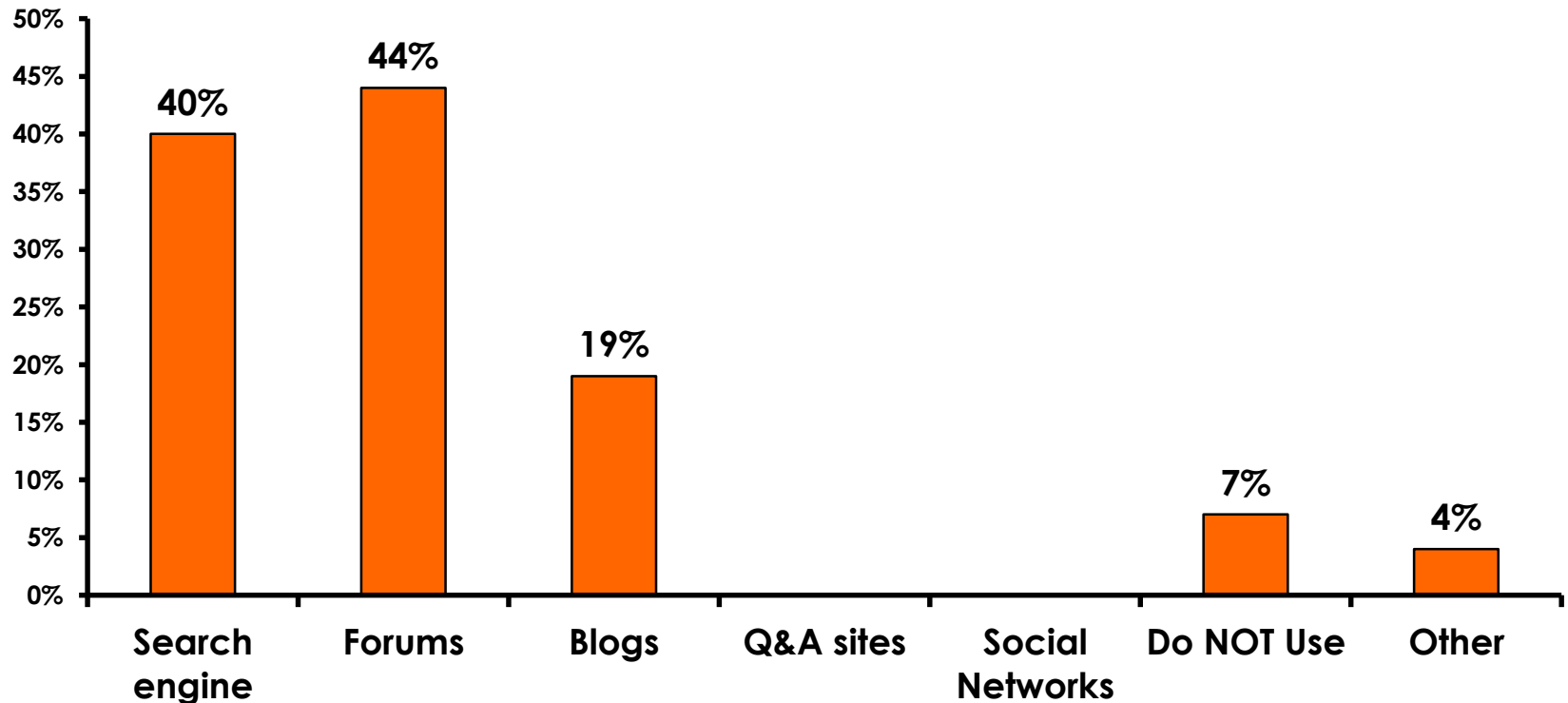
7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



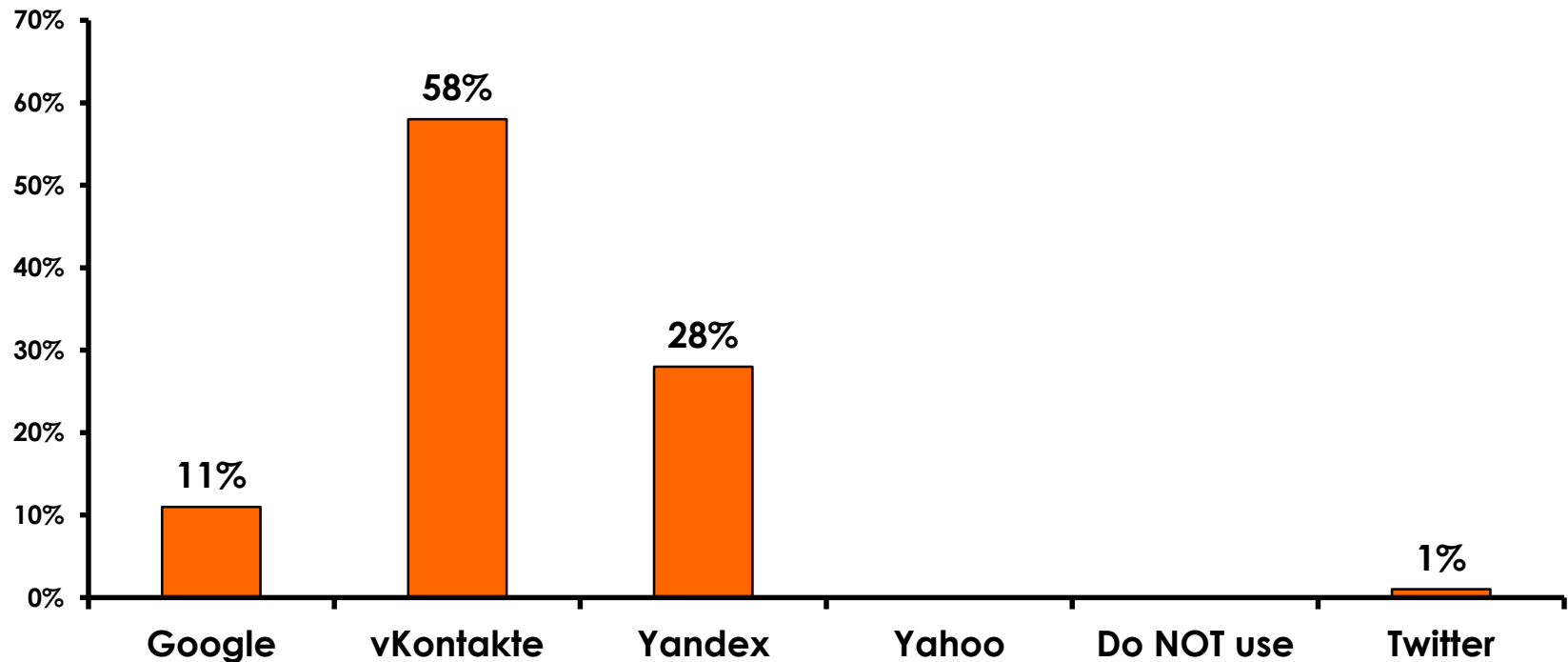
# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info



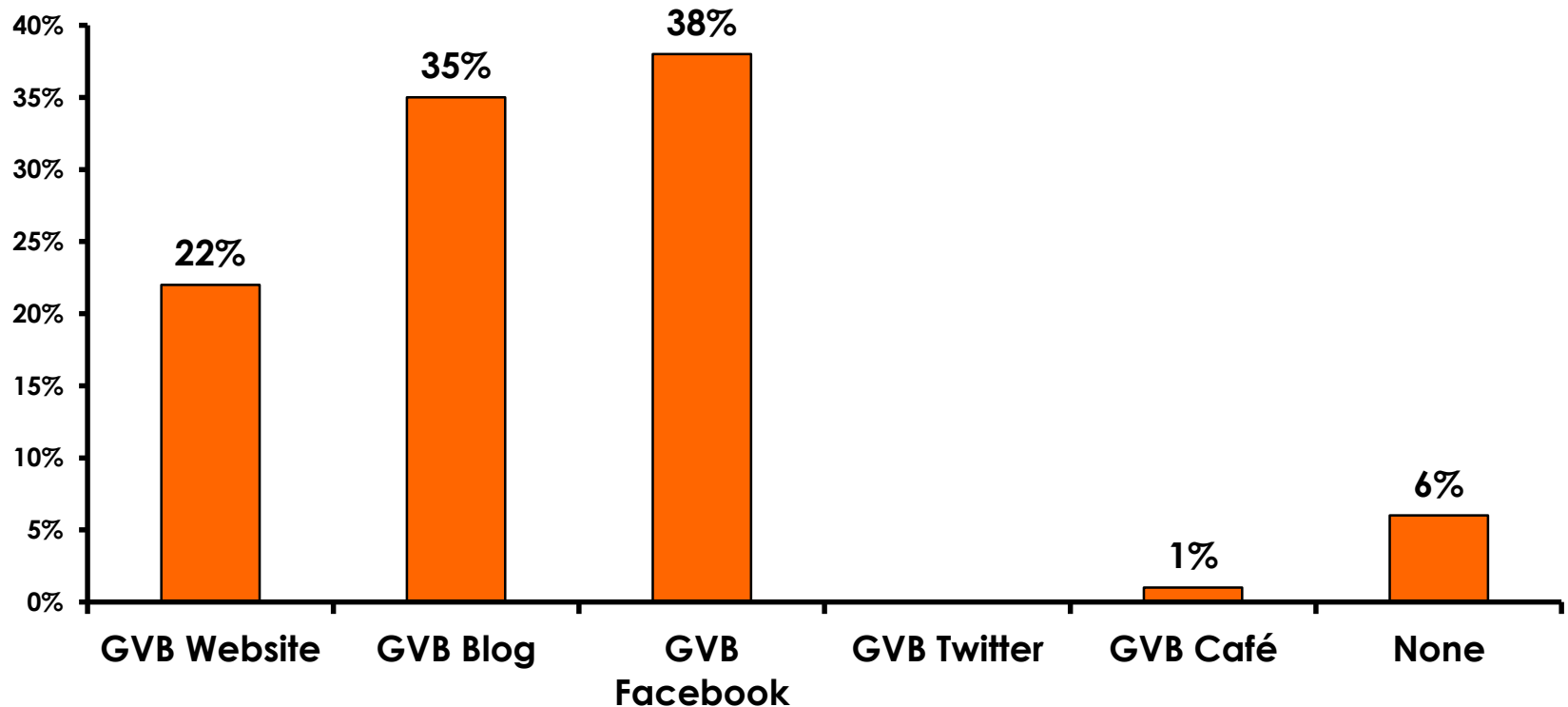
# Internet- Things To Do

## Sources of Info

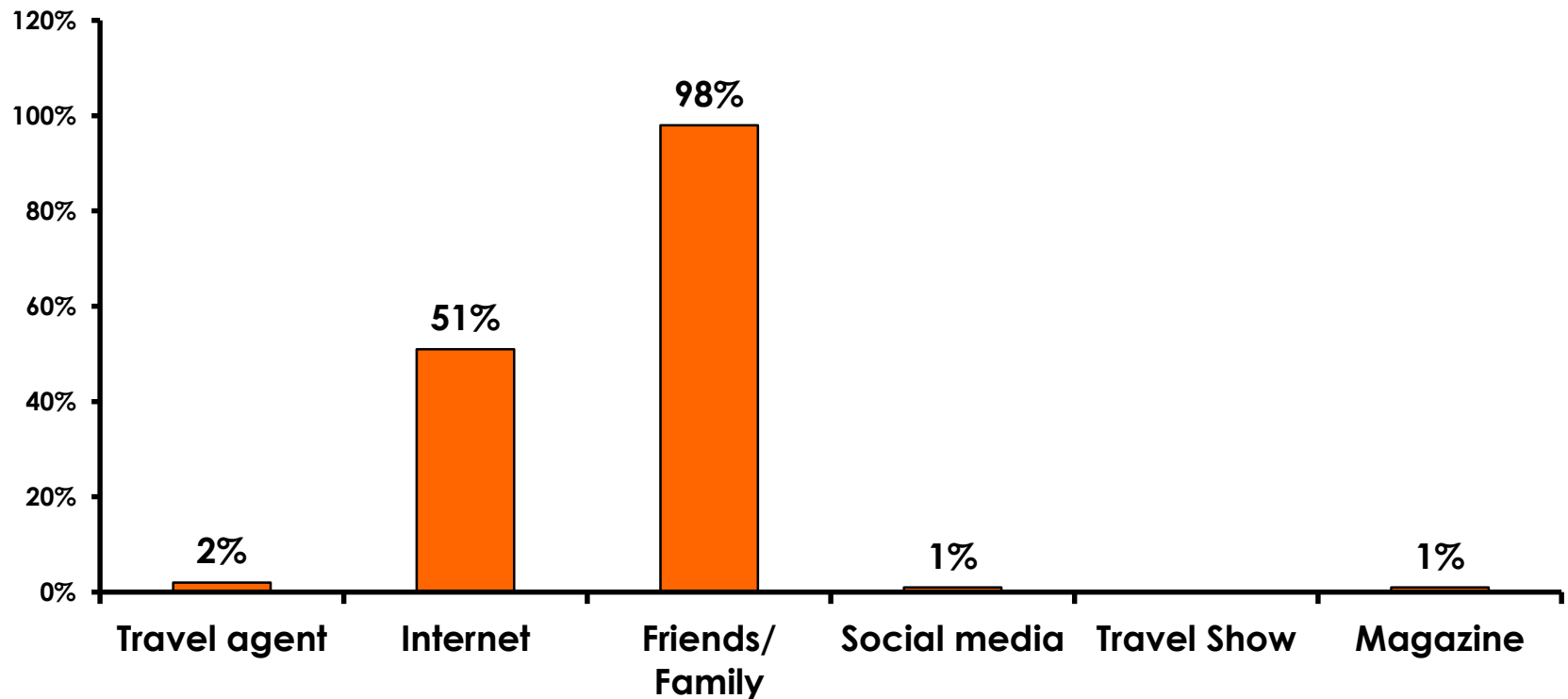




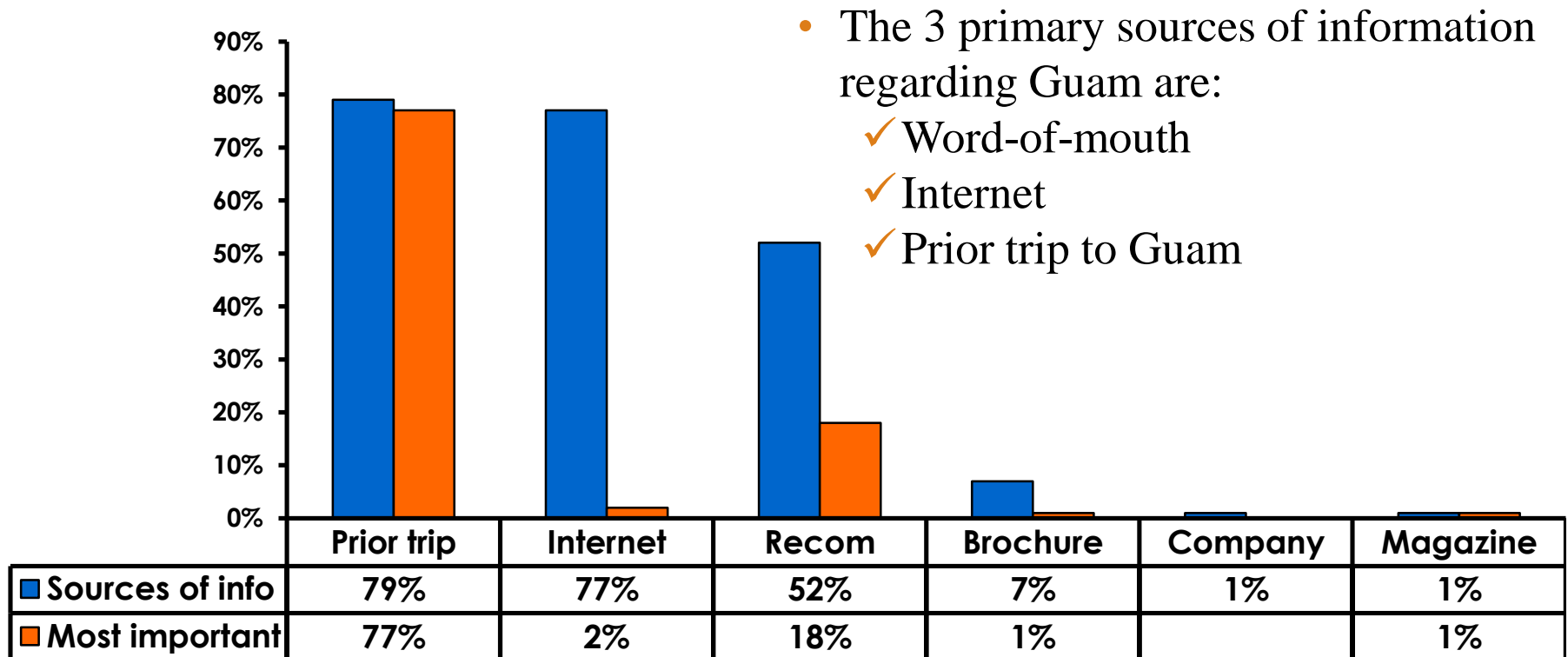
# Internet- GVB Sources



# Travel Motivation- Info Sources

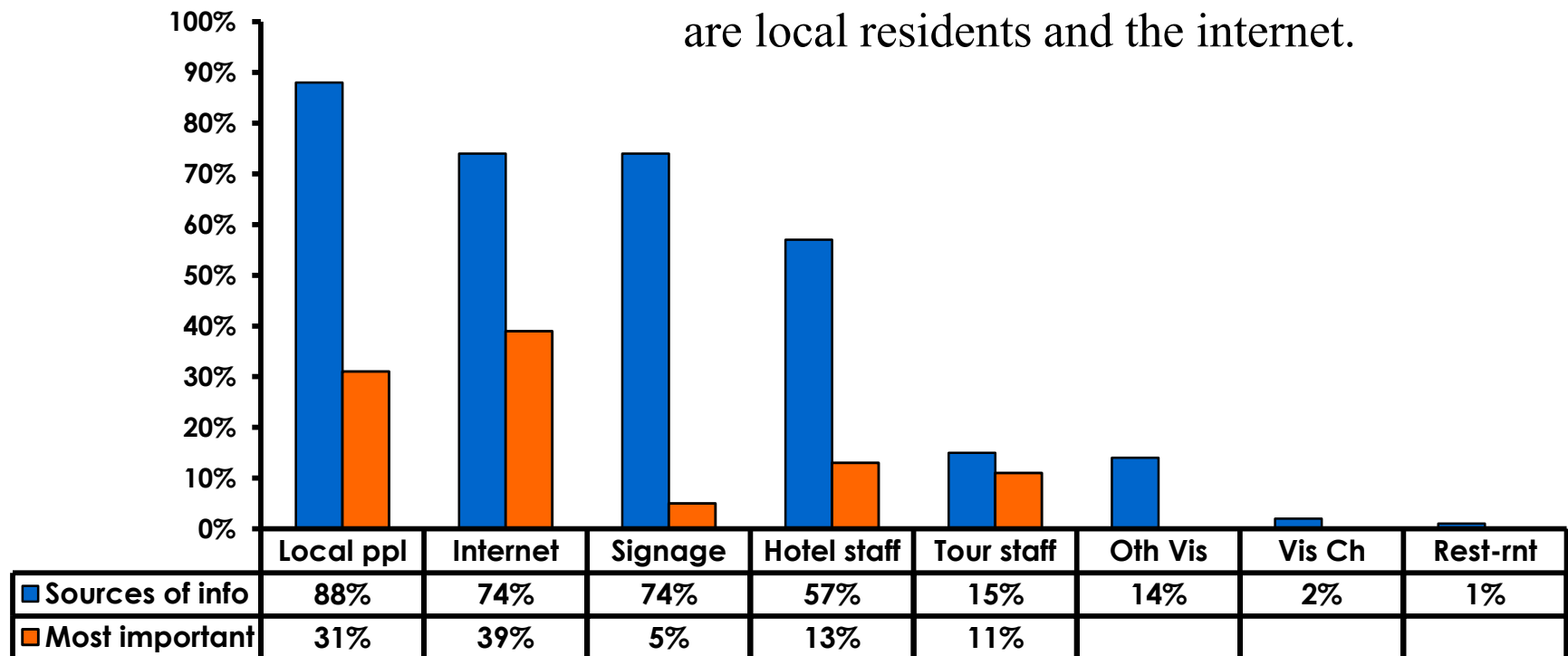


# Sources of Information Pre-arrival



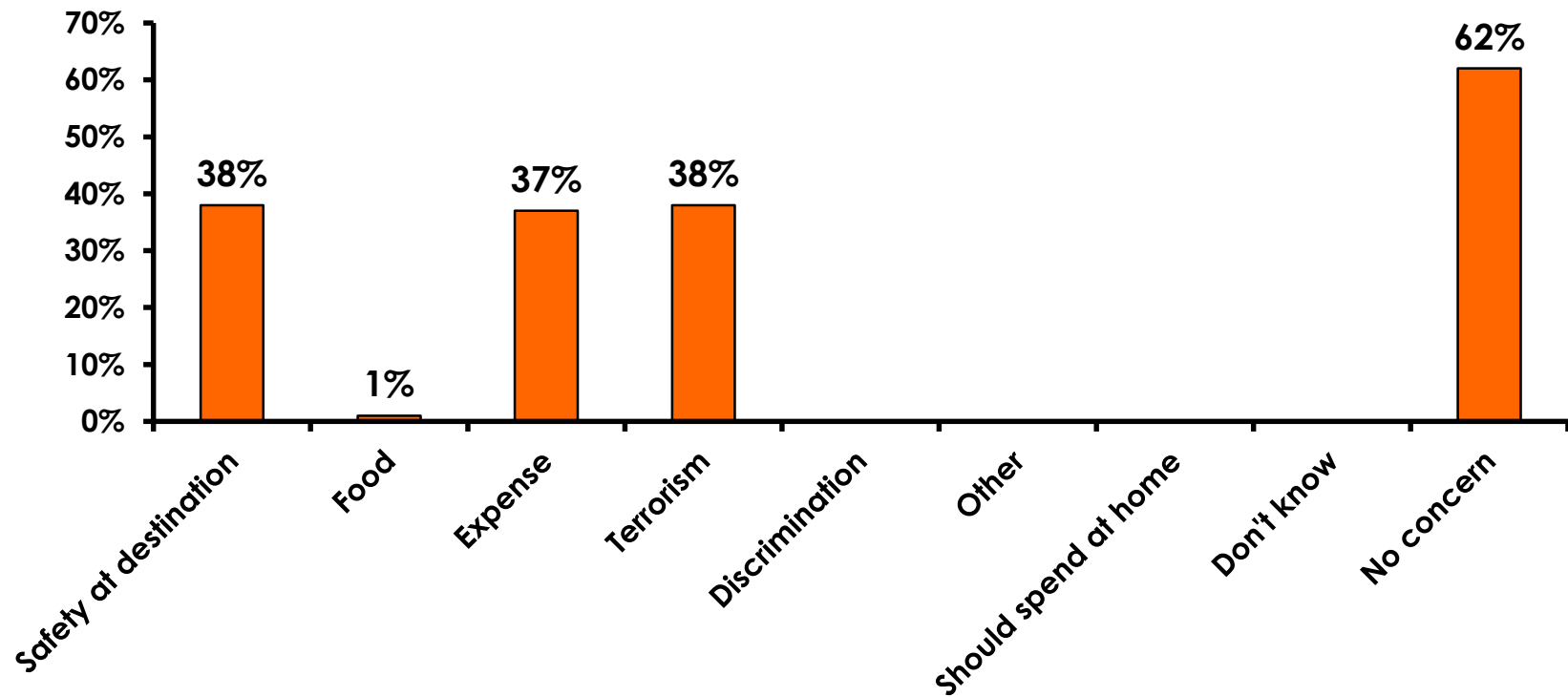
# Sources of Information Post-arrival

- The primary local source of information are local residents and the internet.



# SECTION 6 **OTHER ISSUES**

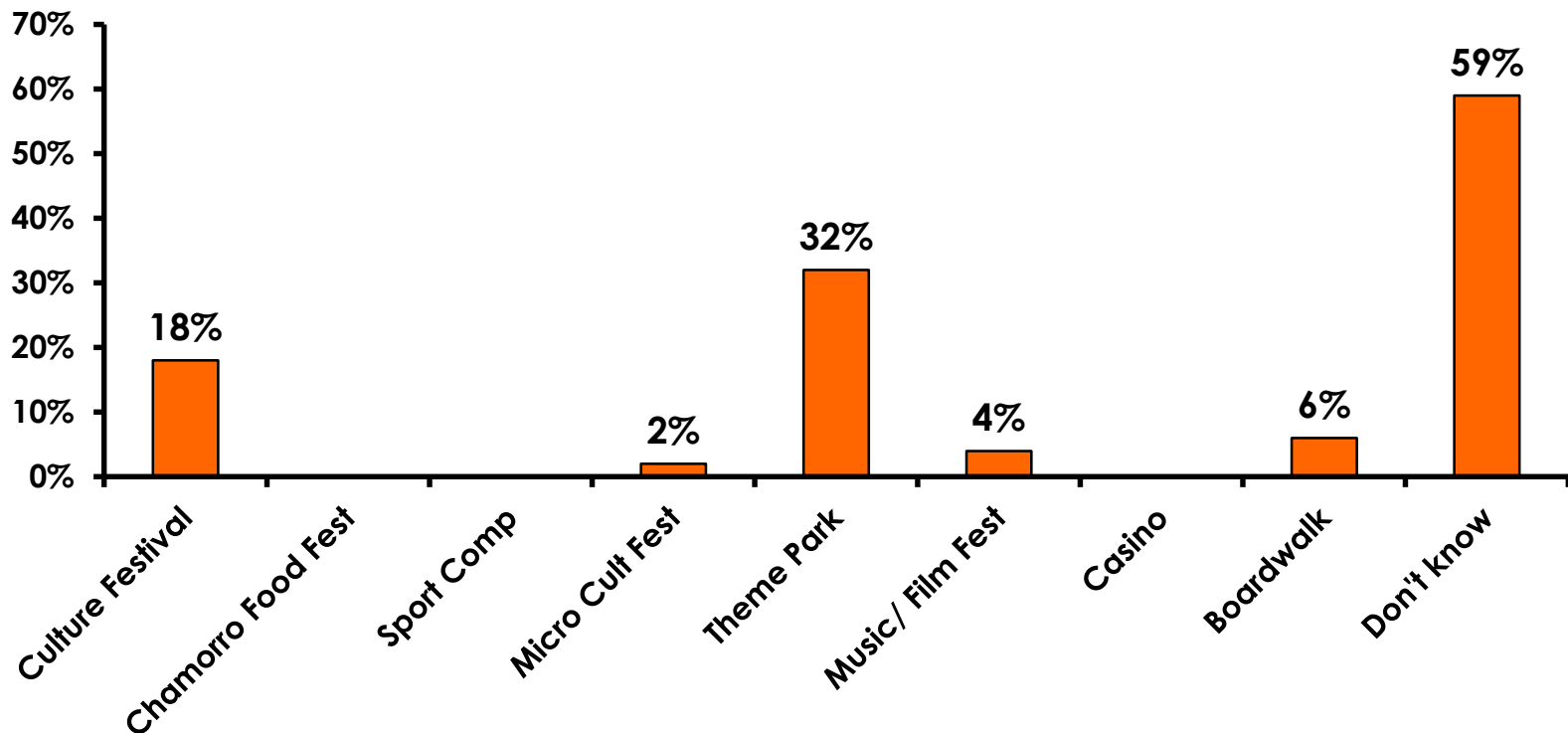
# Concerns about travel outside of Russia - Overall



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

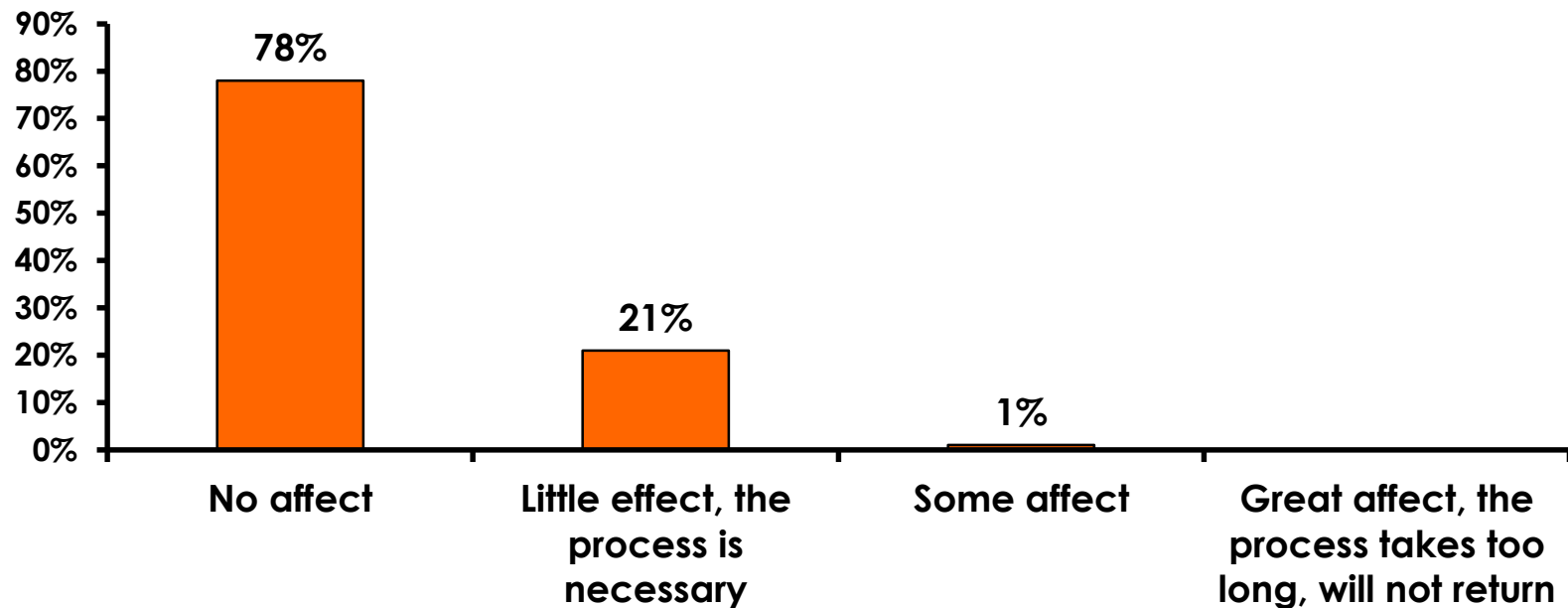
		TOTAL	AGE				Q27							
		-	18-24	25-34	35-49	50+	<732,321	732,321-1,098,481	1,098,482-1,464,642	1,464,643-1,830,803	1,830,803-2,263,124	2,563,125-3,661,606	3,661,607+	No Income
Q21	No concerns	62%	50%	59%	63%	67%	67%	59%	65%	71%	100%			
	Safety	38%	50%	41%	37%	33%	33%	41%	35%	29%				
	Terrorism	38%	50%	41%	37%	33%	33%	41%	35%	29%				
	Expense	37%	50%	41%	34%	33%	33%	40%	35%	14%				
	Food	1%		3%				1%						
	Total Count	125	8	32	67	18	3	68	43	7	2			

# Activities/ Attractions- Appeal





# Security Screening/ Immigration Process at Guam International Airport



# Airport Arrival Experience

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

