



# GUAM VISITORS BUREAU

## Russia Visitor Tracker Exit Profile

### FY2013 Market Segmentation

#### 1<sup>st</sup> Qtr. (OCT~DEC 2012)



**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 Russian 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 +/- 8.0 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 +/- 8.0 percentage points.

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# Objectives

- **The specific objectives of the analysis were:**
  - To determine the relative size and expenditure behavior of the following market segments:
    - Families
    - Adventure traveler
    - Wives
    - MICE
    - 18-35
    - 36-55
    - Child
    - Wedding/ Honeymoon
    - Seniors
    - Sports competition
  - To identify (for all Russian visitors) the most important determinants of on-island spending; and
  - To identify the most significant factors affecting overall visitor satisfaction.

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# Highlighted Segments Parameters

- Families – Q.6
- Adventure traveler – Q.18/19/23
- Wife – Q.E/ Gender
- MICE– Q.5A
- 18-35 – Q.F
- 36-55 – Q.F
- Child – Q.6
- Wedding/ Honeymoon – Q.5A
- Senior – Q.F
- Sports competition – Q.5A

# Highlighted Segments

	1 <sup>st</sup> QTR	2 <sup>nd</sup> QTR	3 <sup>rd</sup> QTR	4 <sup>th</sup> QTR
<b>Families</b>	72%			
<b>Adventure traveler</b>	89%			
<b>Wives</b>	39%			
<b>MICE</b>	-			
<b>18-35</b>	34%			
<b>36-55</b>	59%			
<b>Child</b>	29%			
<b>Wedding/ Honeymoon</b>	-			
<b>Seniors (60+)</b>	2%			
<b>Sports Competition</b>	6%			
<b>TOTAL</b>	<b>150</b>			

SECTION 1  
**PROFILE OF RESPONDENTS**

# Marital Status Tracking

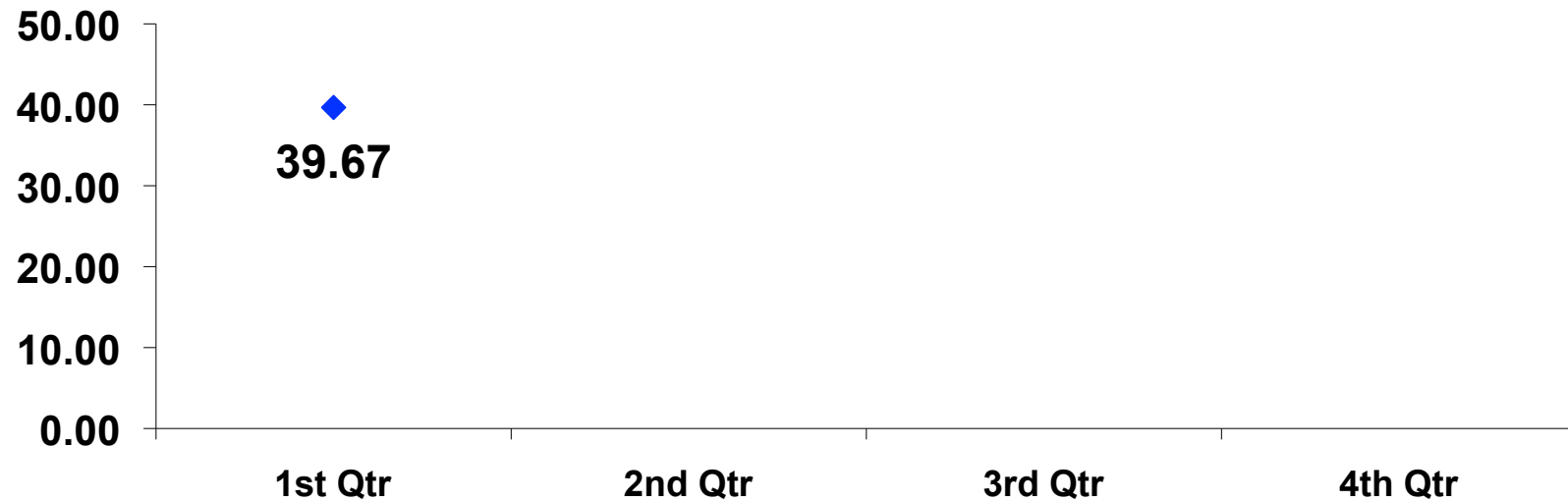


# Marital Status Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QE	Married	Count	124	92	109	58		43	76	35		2	7
		Column N %	84%	87%	83%	100%		84%	87%	83%		67%	78%
	Single	Count	24	14	22			8	11	7		1	2
		Column N %	16%	13%	17%			16%	13%	17%		33%	22%
Total		Count	148	106	131	58		51	87	42		3	9



# Average Age Tracking



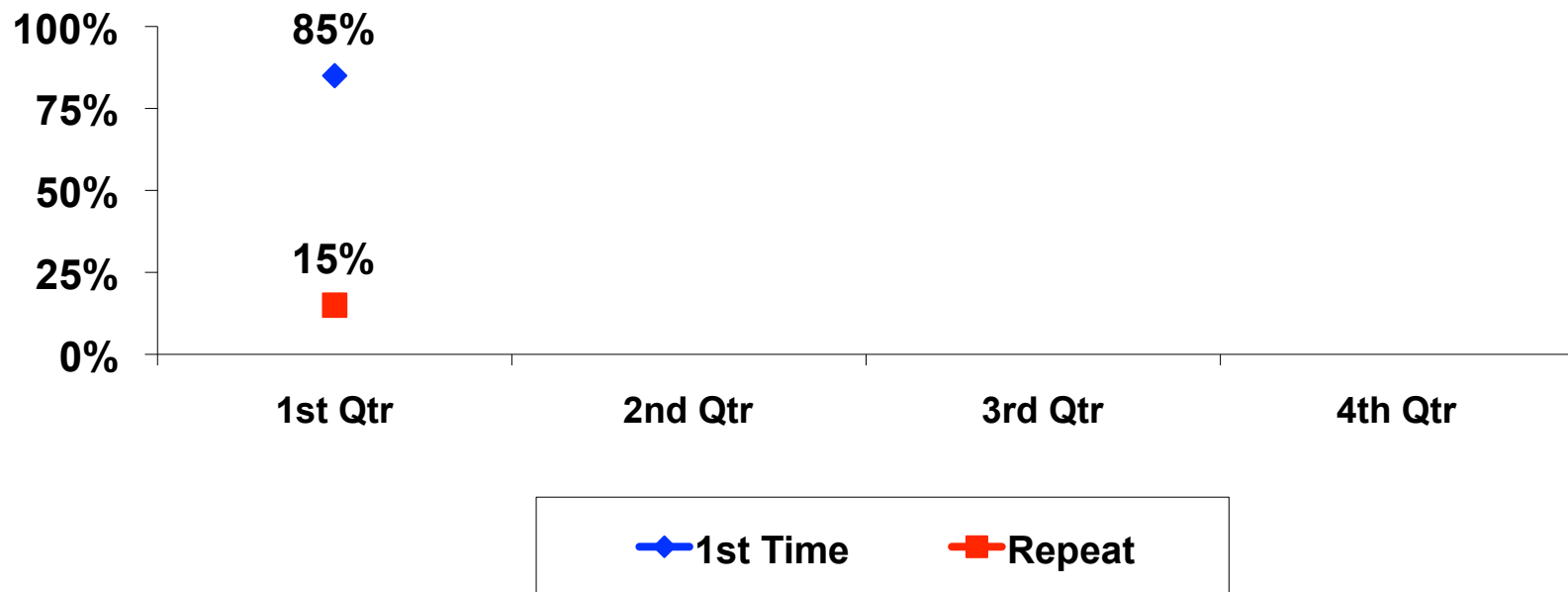
# Age Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	2	2	1			2					
		Column N %	1%	2%	1%			4%					
	25-34	Count	41	22	37	24		41		20			5
		Column N %	28%	21%	28%	42%		80%		48%			56%
	35-49	Count	82	66	75	27		8	74	20			4
		Column N %	56%	62%	58%	47%		16%	84%	48%			44%
	50+	Count	22	16	17	6			14	2		3	
		Column N %	15%	15%	13%	11%			16%	5%		100%	
	Total	Count	147	106	130	57		51	88	42		3	9
QF	Mean		39.67	40.24	39.20	38.16		31.43	42.72	35.24		61.67	34.89

# Income - Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q27	<732,321	Count	23	14	16	13		9	11	5		3	
		Column N %	16%	13%	12%	23%		18%	13%	12%		100%	
	732,321-1,098,481	Count	55	36	48	27		19	32	13			1
		Column N %	37%	34%	37%	48%		39%	37%	31%			11%
	1,098,482-1,464,642	Count	39	32	38	8		15	24	13			5
		Column N %	27%	30%	29%	14%		31%	28%	31%			56%
	1,464,643-1,830,803	Count	13	11	12	3		2	8	4			2
		Column N %	9%	10%	9%	5%		4%	9%	10%			22%
	1,830,803-2,263,124	Count	9	6	9	1		2	6	3			1
		Column N %	6%	6%	7%	2%		4%	7%	7%			11%
	2,563,125-3,661,606	Count	4	3	4	1		2	2	2			
		Column N %	3%	3%	3%	2%		4%	2%	5%			
	3,661,607+	Count	4	4	4	3			4	2			
		Column N %	3%	4%	3%	5%			5%	5%			
Total		Count	147	106	131	56		49	87	42		3	9

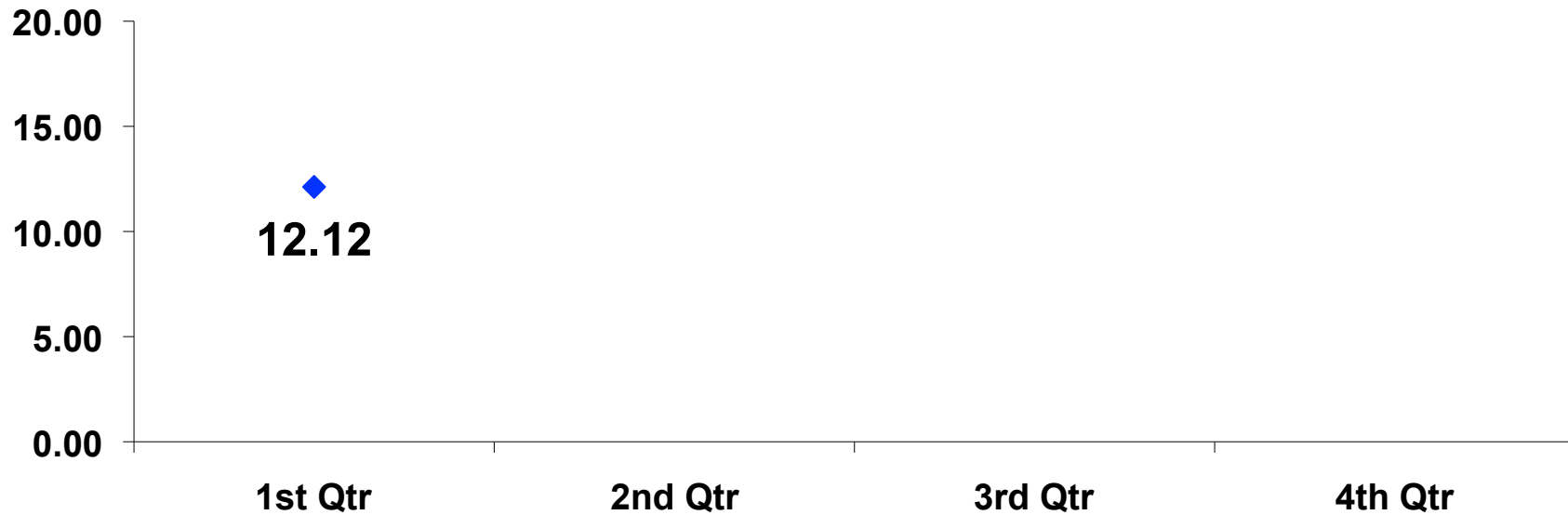
# Prior Trips to Guam Tracking



# Prior Trips to Guam Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	126	86	113	44		43	76	32		3	9
		Column N %	85%	80%	86%	79%		86%	87%	76%		100%	100%
	No	Count	22	21	19	12		7	11	10			
		Column N %	15%	20%	14%	21%		14%	13%	24%			
	Total	Count	148	107	132	56		50	87	42		3	9

# Average Length of Stay Tracking



# Average Length of Stay Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q8	1-2	Count	8	1	7	2		4	4				7
		Column N %	6%	1%	5%	4%		8%	5%				
	3	Count	2		2				2				
		Column N %	1%		2%				2%				
	4+	Count	135	106	120	55		44	80	43		3	1
		Column N %	93%	99%	93%	96%		92%	93%	100%		100%	13%
	Total	Count	145	107	129	57		48	86	43		3	8
Q8	Mean		12.12	13.28	12.17	12.49		11.25	12.43	13.12		14.00	3.50
	Median		14	14	13	14		13	14	13		14	2

# SECTION 2 **TRAVEL PLANNING**



# Travel Planning Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q7	Full package tour	Count	58	51	54	20		12	42	20		1	1
		Column N %	39%	48%	41%	35%		24%	48%	47%		33%	11%
	Free-time package tour	Count	41	32	37	16		17	22	15			
		Column N %	28%	30%	28%	28%		34%	25%	35%			
	Individually arranged travel (FIT)	Count	29	22	24	15		9	16	8		1	
		Column N %	20%	21%	18%	26%		18%	18%	19%		33%	
	Group tour	Count	9	2	9	2		5	4				6
		Column N %	6%	2%	7%	4%		10%	5%				67%
	Company paid travel	Count	10		8	4		7	3				2
		Column N %	7%		6%	7%		14%	3%				22%
	Other	Count	1									1	
		Column N %	1%									33%	
	Total	Count	148	107	132	57		50	87	43		3	9

# Travel Motivation Segmentation

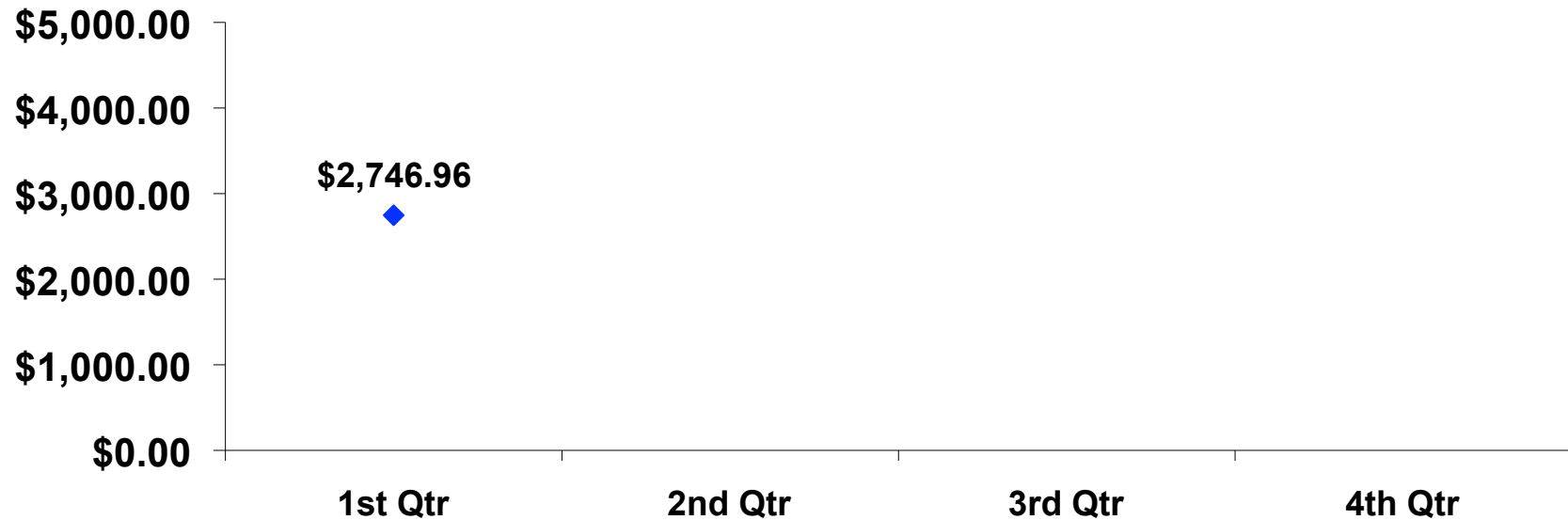
			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q5A	No Visa required	Count	132	96	118	48		42	81	34		3	6
		Column N %	89%	89%	89%	84%		84%	92%	79%		100%	67%
	Natural beauty	Count	115	89	101	48		39	65	38		3	2
		Column N %	77%	82%	76%	84%		78%	74%	88%		100%	22%
	Short travel time	Count	76	63	70	32		25	46	23		1	1
		Column N %	51%	58%	53%	56%		50%	52%	53%		33%	11%
	Relax	Count	60	48	55	22		18	35	18		2	
		Column N %	40%	44%	41%	39%		36%	40%	42%		67%	
	Pleasure	Count	54	44	51	21		18	32	16			
		Column N %	36%	41%	38%	37%		36%	36%	37%			
	Safe	Count	44	37	39	16		12	27	14		1	
		Column N %	30%	34%	29%	28%		24%	31%	33%		33%	
	Shopping	Count	33	27	30	16		11	19	10			
		Column N %	22%	25%	23%	28%		22%	22%	23%			
	Recomm- friend/family/trvl agnt	Count	32	24	25	12		11	18	6		2	
		Column N %	21%	22%	19%	21%		22%	20%	14%		67%	
	Previous trip	Count	17	16	15	9		6	8	7			
		Column N %	11%	15%	11%	16%		12%	9%	16%			
	Scuba	Count	14	5	12	3		8	6	3			8
		Column N %	9%	5%	9%	5%		16%	7%	7%			89%
	Water sports	Count	12	7	12	2		4	8	4			5
		Column N %	8%	6%	9%	4%		8%	9%	9%			56%
	Company Sponsored	Count	10	1	9	3		7	3				3
		Column N %	7%	1%	7%	5%		14%	3%				33%
	Organized sports	Count	9	2	9	1		5	4				9
		Column N %	6%	2%	7%	2%		10%	5%				100%
	Visit friends/ Relatives	Count	6	6	5	3		1	4	3		1	
		Column N %	4%	6%	4%	5%		2%	5%	7%		33%	
	Price	Count	6	4	5	1			5			1	
		Column N %	4%	4%	4%	2%			6%			33%	
	Company/ Business Trip	Count	5	1	3	4		3	2	1			
		Column N %	3%	1%	2%	7%		6%	2%	2%			
	Other	Count	1	1	1							1	
		Column N %	1%	1%	1%							33%	
	Total	Count	149	108	133	57		50	88	43		3	9

# Information Sources Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q1	Internet	Count	123	86	113	41		43	71	34		1	9
		Column N %	82%	80%	85%	71%		84%	81%	79%		33%	100%
	Friend/ Relative	Count	73	49	65	27		27	38	24		3	8
		Column N %	49%	45%	49%	47%		53%	43%	56%		100%	89%
	Travel Agent Brochure	Count	32	24	31	11		10	21	9			1
		Column N %	21%	22%	23%	19%		20%	24%	21%			11%
	TV	Count	25	19	23	8		6	17	5		1	1
		Column N %	17%	18%	17%	14%		12%	19%	12%		33%	11%
	Prior Trip	Count	18	17	15	9		6	9	8			
		Column N %	12%	16%	11%	16%		12%	10%	19%			
	Co-Worker/ Company Trvl Dept	Count	7	4	6	3		2	5	2			
		Column N %	5%	4%	5%	5%		4%	6%	5%			
	Newspaper	Count	6	5	5	3		2	3	1			
		Column N %	4%	5%	4%	5%		4%	3%	2%			
	GVB Promo	Count	5	2	4	2			4				
		Column N %	3%	2%	3%	3%			5%				
	Magazine (Consumer)	Count	5	4	5	3			5	1			
		Column N %	3%	4%	4%	5%			6%	2%			
	Consumer Trvl Show	Count	4	2	4	2		1	3	1			
		Column N %	3%	2%	3%	3%		2%	3%	2%			
	Radio	Count	4	4	3	2		2	2	2			
		Column N %	3%	4%	2%	3%		4%	2%	5%			
	Travel Trade Show	Count	3	1	2			1	2				
		Column N %	2%	1%	2%			2%	2%				
	GVB Office	Count	3	2	3	1		2	1	1			
		Column N %	2%	2%	2%	2%		4%	1%	2%			
	Total	Count	150	108	133	58		51	88	43		3	9

SECTION 3  
**EXPENDITURES**

# Prepaid Expenditures Tracking

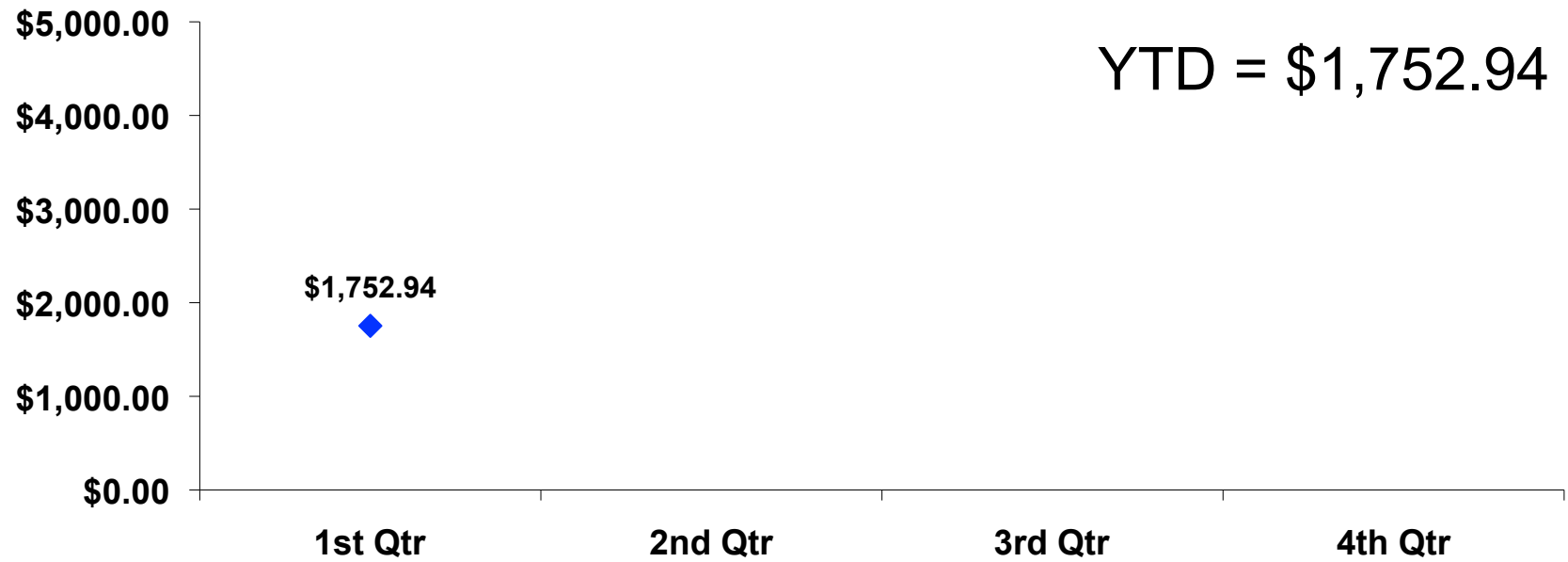


YTD=\$2,746.96

# Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
RUB\$	Mean	\$2,746.96	\$2,997.61	\$2,728.28	\$2,910.94	.	\$2,332.20	\$3,002.99	\$2,580.22	.	\$1,610.46	\$465.24
	Median	\$2,845	\$2,883	\$2,789	\$2,797	.	\$2,308	\$2,979	\$2,604	.	\$1,933	\$0

# On-Island Expenditures Tracking



# On-Island Expenditures Per Person Segmentation

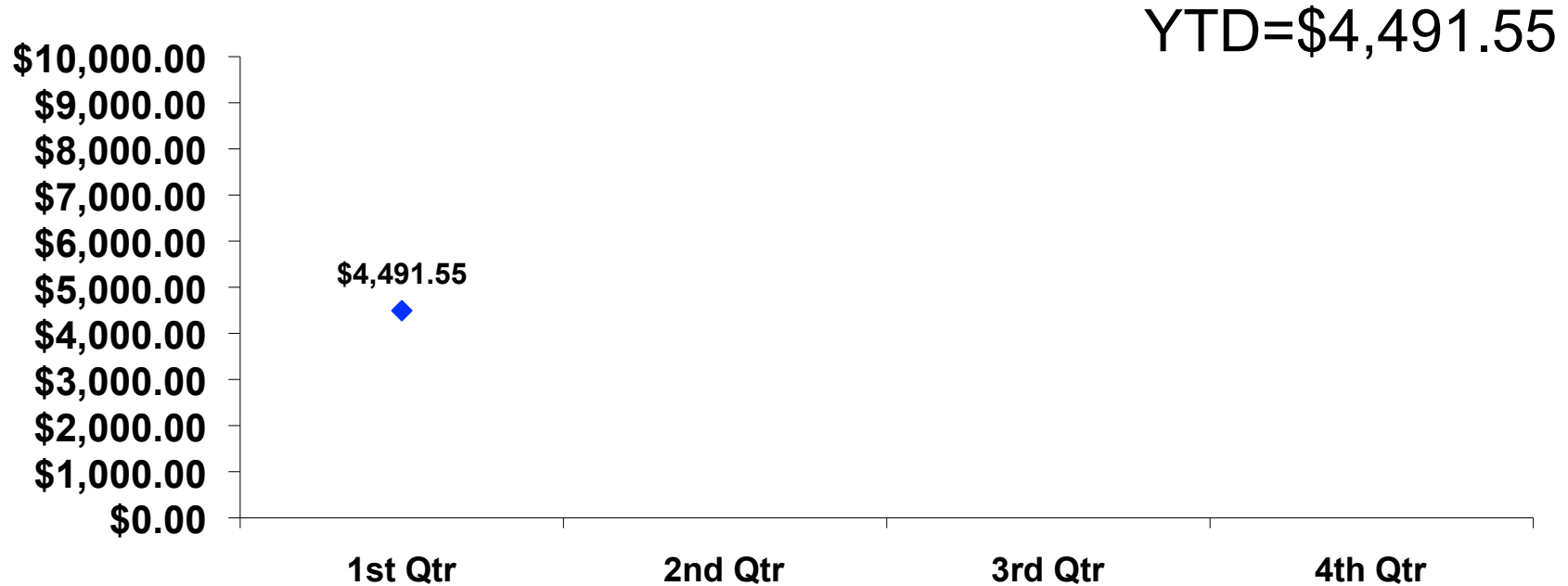
		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
ONISLE	Mean	\$1,752.94	\$1,756.18	\$1,777.57	\$1,818.07	.	\$1,585.43	\$1,836.90	\$1,321.93	.	\$1,050.83	\$1,216.67
	Median	\$1,575	\$1,572	\$1,667	\$1,667	.	\$1,500	\$1,662	\$1,100	.	\$990	\$1,000



# On-Island Expense Breakdown

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$423.76	\$509.07	\$427.14	\$395.18	.	\$344.80	\$468.18	\$402.09	.	\$333.33	\$277.78
	Median	\$250	\$300	\$250	\$250	.	\$225	\$250	\$250	.	\$300	\$150
F&B FF/STORE	Mean	\$78.01	\$92.35	\$80.63	\$102.63	.	\$93.48	\$64.20	\$109.86	.	\$0.00	\$0.00
	Median	\$0	\$0	\$0	\$0	.	\$0	\$0	\$0	.	\$0	\$0
F&B RESTRNT	Mean	\$482.45	\$557.18	\$503.80	\$486.14	.	\$438.40	\$490.51	\$575.12	.	\$266.67	\$261.11
	Median	\$350	\$500	\$400	\$350	.	\$300	\$450	\$300	.	\$200	\$250
OPT TOUR	Mean	\$377.08	\$461.16	\$410.49	\$255.00	.	\$356.20	\$378.12	\$497.56	.	\$93.33	\$100.00
	Median	\$300	\$360	\$300	\$200	.	\$200	\$335	\$300	.	\$100	\$100
GIFT- SELF	Mean	\$1,264.70	\$1,522.59	\$1,283.01	\$1,472.46	.	\$1,183.00	\$1,283.98	\$1,573.26	.	\$333.33	\$238.89
	Median	\$1,000	\$1,200	\$1,000	\$1,000	.	\$1,000	\$1,000	\$1,000	.	\$350	\$150
GIFT- OTHER	Mean	\$442.01	\$439.17	\$428.87	\$456.67	.	\$405.60	\$446.36	\$403.49	.	\$366.67	\$422.22
	Median	\$300	\$300	\$300	\$300	.	\$300	\$300	\$250	.	\$350	\$250
TRANS	Mean	\$203.64	\$251.42	\$218.74	\$181.32	.	\$175.20	\$220.38	\$247.33	.	\$100.00	\$65.56
	Median	\$150	\$200	\$150	\$120	.	\$90	\$150	\$160	.	\$100	\$0
OTHER	Mean	\$182.22	\$213.48	\$192.11	\$175.53	.	\$180.12	\$190.97	\$204.56	.	\$100.00	\$61.11
	Median	\$100	\$100	\$100	\$100	.	\$100	\$100	\$100	.	\$100	\$50
TOTAL	Mean	\$3,441.19	\$4,024.65	\$3,529.08	\$3,545.96	.	\$3,124.98	\$3,550.66	\$3,930.67	.	\$1,593.33	\$1,426.67
	Median	\$2,950	\$3,480	\$3,000	\$3,000	.	\$2,675	\$3,130	\$3,120	.	\$1,525	\$1,000

# Total Expenditures Tracking



# Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
TOTPP	Mean	\$4,491.55	\$4,742.28	\$4,497.35	\$4,709.69	.	\$3,912.57	\$4,827.67	\$3,889.97	.	\$2,661.29	\$1,681.91
	Median	\$4,458	\$4,541	\$4,541	\$4,419	.	\$3,728	\$4,684	\$3,751	.	\$2,570	\$1,000

SECTION 4  
**ADVANCED STATISTICS**

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# Analysis Technique

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ( $p < .05$ ) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

<b>Drivers of Overall Satisfaction, 1st Qtr 2012</b>	
<b>Drivers:</b>	<b>rank</b>
Quality & Cleanliness of beaches & parks	<b>1</b>
Ease of getting around	
Safety walking around at night	<b>5</b>
Quality of daytime tours	
Variety of daytime tours	<b>3</b>
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	<b>2</b>
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	<b>4</b>
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	
% of Overall Satisfaction Accounted For	<b>62.4%</b>
NOTE: Only significant drivers are included.	

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# DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Russian visitor's experience on Guam is driven by five significant factors in the First Quarter 2012 Period. By rank order they are:
  - **Quality & cleanliness of beaches and parks,**
  - **Quality of hotel accommodations,**
  - **Variety of day time tours,**
  - **Quality of landscape in Tumon, and**
  - **Safety walking around at night.**
- With all five factors the overall  $r^2$  is .624 meaning that **62.4% of overall satisfaction is accounted for by these five factors.**

<b>Drivers of Per Person On Island Expenditures, 1st Qtr 2012</b>	
<b>Drivers:</b>	<b>rank</b>
Quality & Cleanliness of beaches & parks	
Ease of getting around	<b>1</b>
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	<b>3.8%</b>
NOTE: Only significant drivers are included.	



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# Drivers of Per Person On-Island Expenditure

- **Per Person On-Island Expenditure** of Russian visitors on Guam is driven by one significant factor in the first quarter 2012 Period. That factor is:
  - **Ease of getting around.**
- With this one factor the overall  $r^2$  is .038 meaning that **3.8% of per person on island expenditure is accounted for by this factor.**