GUAM VISITORS BUREAU
Russia Visitor Tracker Exit Profile
FY2013 Market Segmentation
3rd Qtr. (APR~JUN 2013)

Prepared by: QMark Research

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 **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 +/- 8.0 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.

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.

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

	1st QTR	2nd QTR	3rd QTR	4th QTR
Families	72%	89%	83%	
Adventure traveler	89%	68%	67%	
Wives	39%	33%	36%	
MICE	-	-	-	
18-35	34%	27%	27%	
36-55	59%	66%	62%	
Child	29%	23%	29%	
Wedding/ Honeymoon	-	1%	1%	
Seniors (60+)	2%	3%	5%	
Sports Competition	6%	1%	1%	
TOTAL	**150**	**151**	**151**	

SECTION 1
PROFILE OF RESPONDENTS

Marital Status Tracking
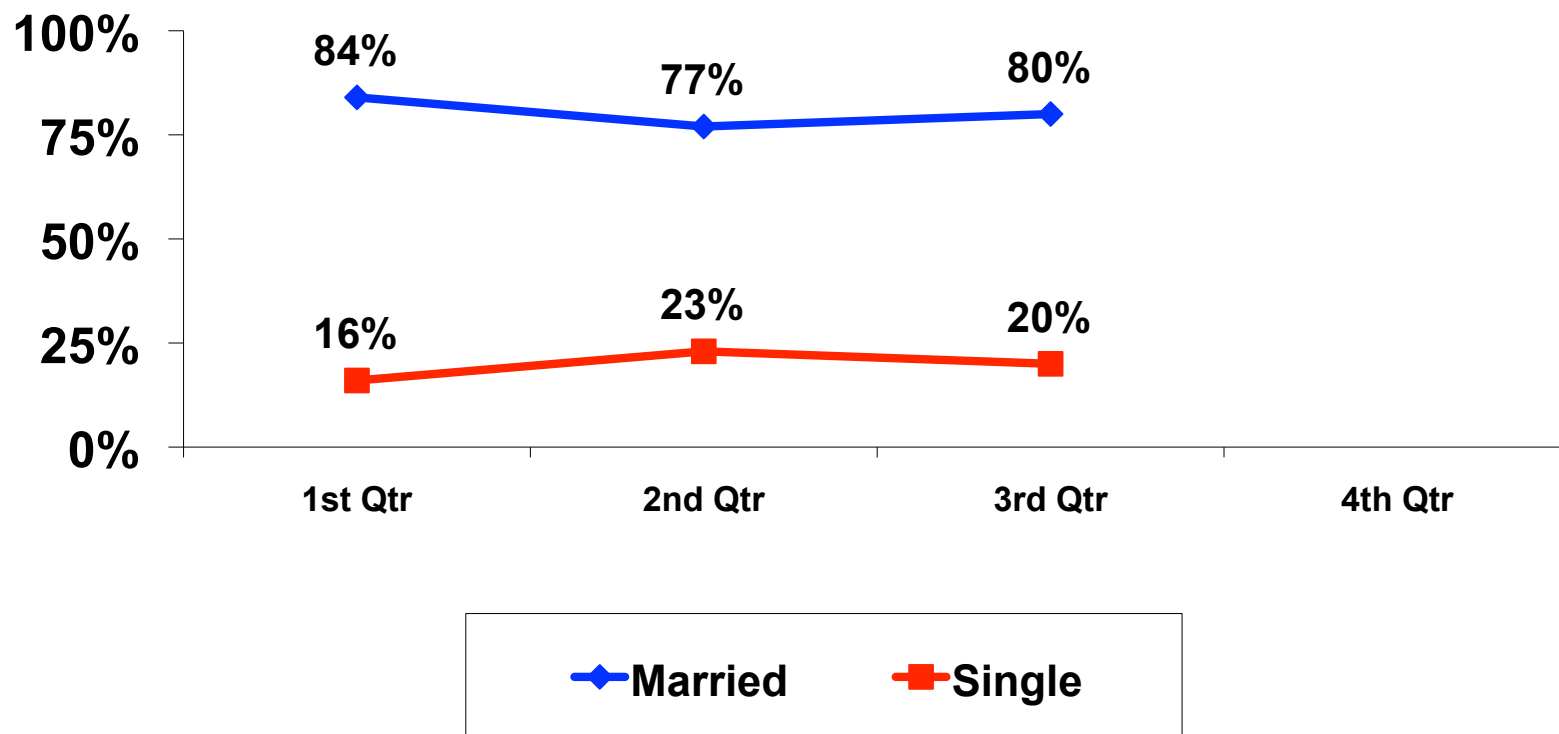
Marital Status Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QE	Married	Count	121	109	86	55		27	83	38	1	6	2
		Column N %	80%	87%	85%	100%		68%	88%	88%	50%	86%	100%
	Single	Count	30	17	15			13	11	5	1	1	
		Column N %	20%	13%	15%			33%	12%	12%	50%	14%	
	Total	Count	151	126	101	55		40	94	43	2	7	2

Average Age Tracking
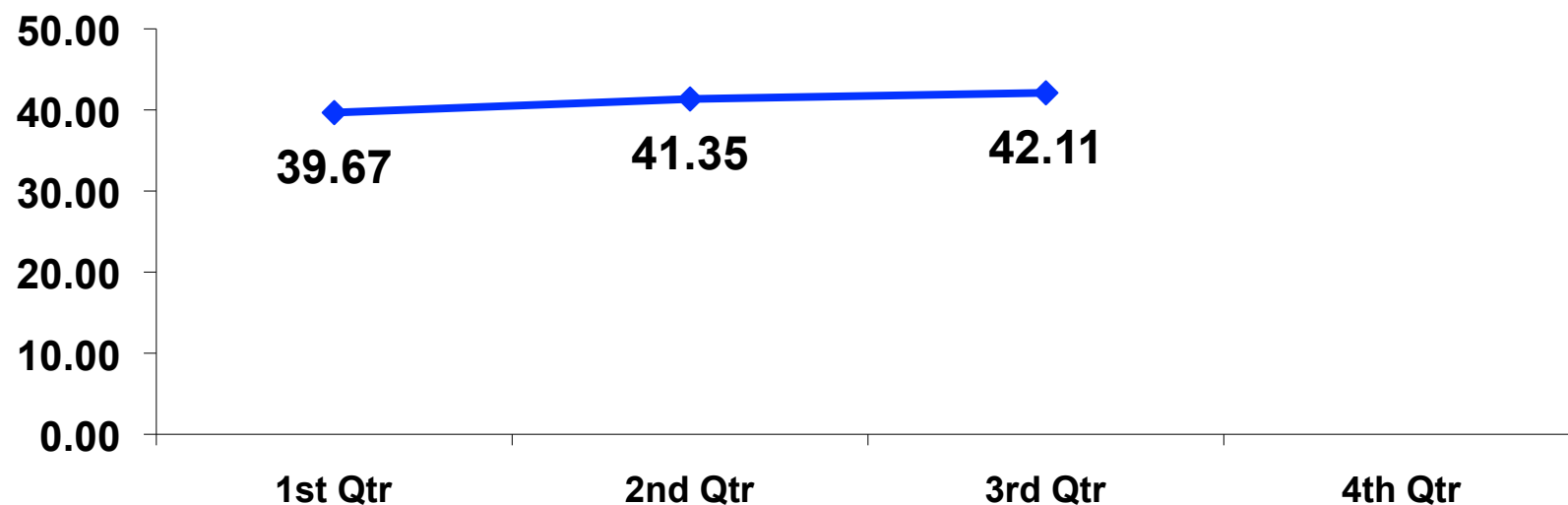
Age Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	7	3	4	1		7		1			
		Column N %	5%	2%	4%	2%		18%		2%			
	25-34	Count	27	24	17	13		27		17			1
		Column N %	18%	19%	17%	24%		68%		40%			50%
	35-49	Count	78	69	60	29		6	72	22			1
		Column N %	52%	55%	59%	53%		15%	77%	51%			50%
	50+	Count	39	30	20	12			22	3	2	7	
		Column N %	26%	24%	20%	22%			23%	7%	100%	100%	
	Total	Count	151	126	101	55		40	94	43	2	7	2
QF	Mean		42.11	41.99	41.19	41.95	.	30.20	44.10	37.14	51.00	61.29	38.00

Income Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q27	<732,321	Count	31	19	16	11		9	11	6		4	
		Column N %	21%	15%	16%	20%		23%	12%	14%		57%	
	732,321-1,098,481	Count	64	58	46	30		16	46	14	2	2	2
		Column N %	43%	47%	47%	56%		41%	50%	33%	100%	29%	100%
	1,098,482-1,464,642	Count	17	13	10	5		7	7	8		1	
		Column N %	11%	11%	10%	9%		18%	8%	19%		14%	
	1,464,643-1,830,803	Count	12	11	12	2			12	3			
		Column N %	8%	9%	12%	4%			13%	7%			
	1,830,803-2,263,124	Count	9	8	5	2		4	5	4			
		Column N %	6%	7%	5%	4%		10%	5%	10%			
	2,563,125-3,661,606	Count	4	3	1	1			3	1			
		Column N %	3%	2%	1%	2%			3%	2%			
	3,661,607+	Count	9	9	6	3		2	7	5			
		Column N %	6%	7%	6%	6%		5%	8%	12%			
	No Income	Count	2	2	2			1	1	1			
		Column N %	1%	2%	2%			3%	1%	2%			
	Total	Count	148	123	98	54		39	92	42	2	7	2

Prior Trips to Guam Tracking
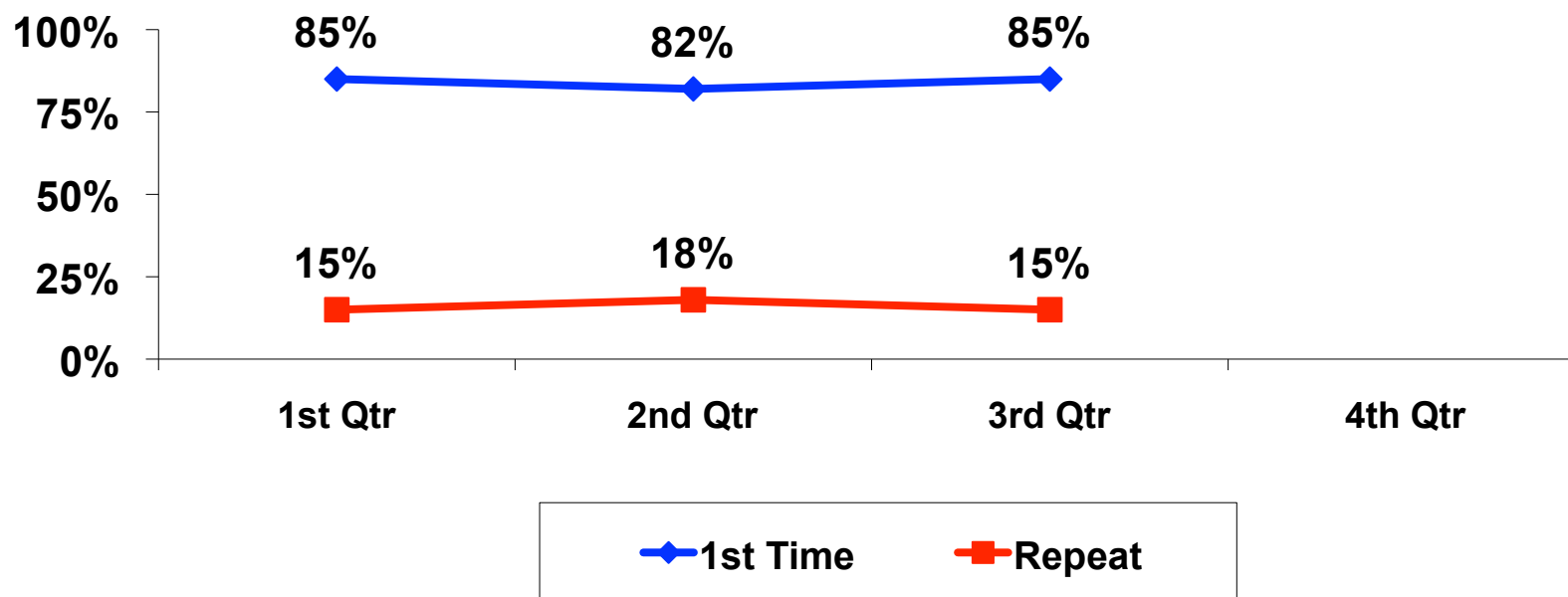
Prior Trips to Guam Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	129	106	85	49		36	76	38	2	7	2
		Column N %	85%	84%	84%	89%		90%	81%	88%	100%	100%	100%
	No	Count	22	20	16	6		4	18	5			
		Column N %	15%	16%	16%	11%		10%	19%	12%			
	Total	Count	151	126	101	55		40	94	43	2	7	2

Average Length of Stay Tracking
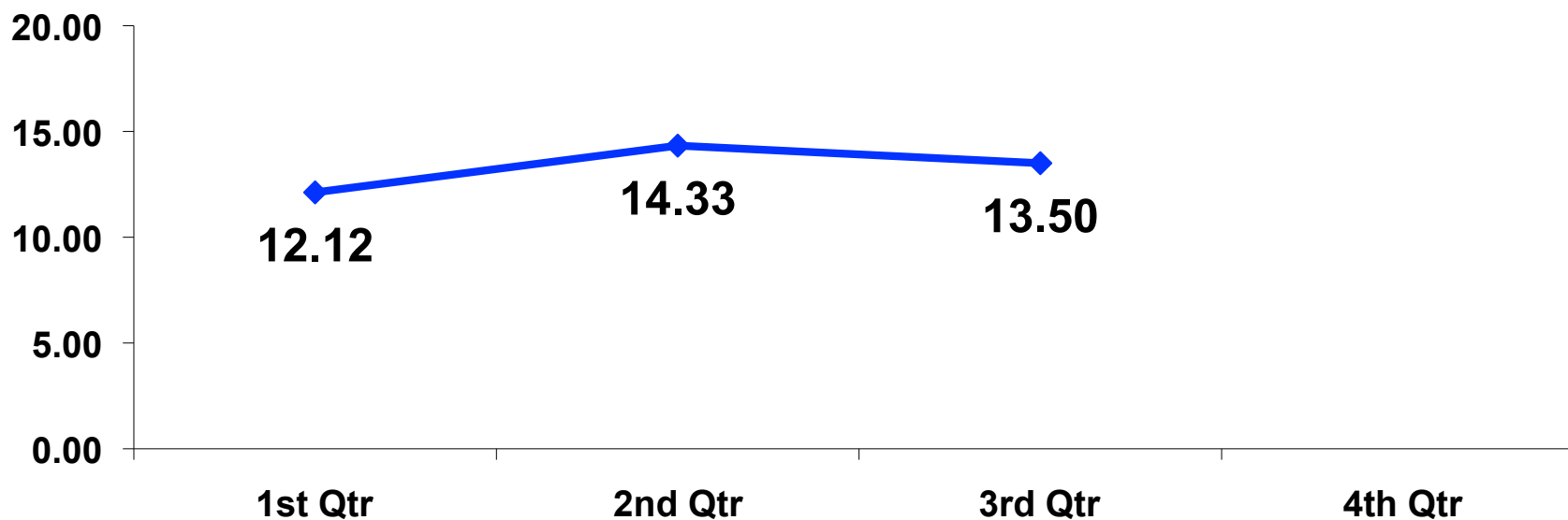
Average Length of Stay Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q8	4+	Count	151	126	101	55		40	94	43	2	7	2
		Column N %	100%	100%	100%	100%		100%	100%	100%	100%	100%	100%
	Total	Count	151	126	101	55		40	94	43	2	7	2
Q8	Mean		13.50	13.73	13.28	12.82	.	13.88	13.28	13.84	12.00	14.57	14.50
	Median		14	14	14	14	.	14	14	14	12	13	15

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	29	29	23	12		7	21	12			1
		Column N %	19%	23%	23%	22%		18%	22%	28%			50%
	Free-time package tour	Count	66	54	46	24		9	47	10	2	5	1
		Column N %	44%	43%	46%	44%		23%	50%	23%	100%	71%	50%
	Individually arranged travel (FIT)	Count	50	39	30	17		22	25	19		1	
		Column N %	33%	31%	30%	31%		55%	27%	44%		14%	
	Company paid travel	Count	2	1	2			1	1	1			
		Column N %	1%	1%	2%			3%	1%	2%			
	Other	Count	4	3		2		1		1		1	
		Column N %	3%	2%		4%		3%		2%		14%	
	Total	Count	151	126	101	55		40	94	43	2	7	2

Travel Motivation Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q5A	Natural beauty	Count	146	123	98	52		38	91	42	2	7	1
		Column N %	97%	98%	97%	95%		95%	98%	98%	100%	100%	50%
	No Visa required	Count	142	119	93	54		36	89	41	2	7	2
		Column N %	95%	95%	92%	98%		90%	96%	95%	100%	100%	100%
	Short travel time	Count	114	96	77	43		29	73	34	1	4	1
		Column N %	76%	77%	76%	78%		73%	78%	79%	50%	57%	50%
	Relax	Count	103	85	76	39		25	66	27		6	1
		Column N %	69%	68%	75%	71%		63%	71%	63%		86%	50%
	Shopping	Count	59	52	39	21		16	39	14	1	3	1
		Column N %	39%	42%	39%	38%		40%	42%	33%	50%	43%	50%
	Pleasure	Count	53	41	29	17		13	35	15		2	
		Column N %	35%	33%	29%	31%		33%	38%	35%		29%	
	Safe	Count	48	37	29	14		10	32	18		1	1
		Column N %	32%	30%	29%	25%		25%	34%	42%		14%	50%
	Recomm- friend/family/trvl agnt	Count	34	30	22	8		9	24	8			
		Column N %	23%	24%	22%	15%		23%	26%	19%			
	Previous trip	Count	19	18	13	5		3	16	4			
		Column N %	13%	14%	13%	9%		8%	17%	9%			
	Price	Count	8	5	6	4		3	4	1		1	
		Column N %	5%	4%	6%	7%		8%	4%	2%		14%	
	Water sports	Count	7	5	4	3		2	3	2		1	
		Column N %	5%	4%	4%	5%		5%	3%	5%		14%	
	Scuba	Count	5	4	5	4		1	4	1			
		Column N %	3%	3%	5%	7%		3%	4%	2%			
	Other	Count	4	4	3	3		2	1	2			
		Column N %	3%	3%	3%	5%		5%	1%	5%			
	Company/ Business Trip	Count	4	3	2	1			3				
		Column N %	3%	2%	2%	2%			3%				
	Visit friends/ Relatives	Count	3	2	2			2	1				
		Column N %	2%	2%	2%			5%	1%				
	Organized sports	Count	2	2	1	1		1	1	1			2
		Column N %	1%	2%	1%	2%		3%	1%	2%			100%
	Honeymoon	Count	2	2	2	1			2		2		
		Column N %	1%	2%	2%	2%			2%		100%		
	Total	Count	150	125	101	55		40	93	43	2	7	2

Information Sources Segmentation

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q1	Internet	Count	120	100	87	48		36	74	34	2	4	2
		Column N %	79%	79%	86%	87%		90%	79%	79%	100%	57%	100%
	Friend/ Relative	Count	86	68	55	33		19	55	19		5	
		Column N %	57%	54%	54%	60%		48%	59%	44%		71%	
	TV	Count	43	39	26	13		9	28	12		4	
		Column N %	28%	31%	26%	24%		23%	30%	28%		57%	
	Travel Agent Brochure	Count	33	27	19	11		6	22	3		2	2
		Column N %	22%	21%	19%	20%		15%	23%	7%		29%	100%
	Other	Count	17	12	7	6		7	7	7		1	
		Column N %	11%	10%	7%	11%		18%	7%	16%		14%	
	Prior Trip	Count	17	16	13	4		3	14	5			
		Column N %	11%	13%	13%	7%		8%	15%	12%			
	Magazine (Consumer)	Count	9	8	4	4		1	7	3			
		Column N %	6%	6%	4%	7%		3%	7%	7%			
	Newspaper	Count	5	4	2	4			3	2		1	
		Column N %	3%	3%	2%	7%			3%	5%		14%	
	Travel Guidebook-Bookstore	Count	2	2	2	1		1	1		1		
		Column N %	1%	2%	2%	2%		3%	1%		50%		
	Theater Ad	Count	1	1		1						1	
		Column N %	1%	1%		2%						14%	
	GVB Promo	Count	1	1	1				1				
		Column N %	1%	1%	1%				1%				
	Co-Worker/ Company Trvl Dept	Count	1		1			1					
		Column N %	1%		1%			3%					
	Total	Count	151	126	101	55		40	94	43	2	7	2

SECTION 3
EXPENDITURES

Prepaid Expenditures Tracking
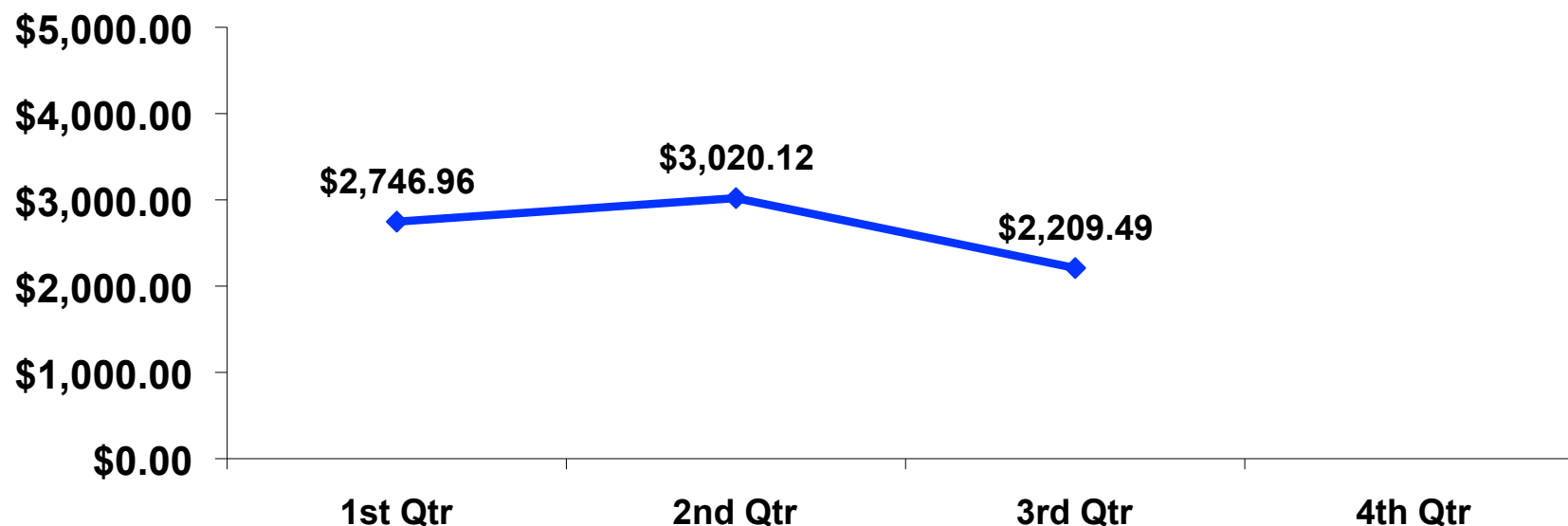
YTD=$2,658.07

Prepaid Expenditures
Per Person Segmentation

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
RUB$	Mean	$2,209.49	$2,242.17	$2,262.05	$2,108.80	.	$1,944.02	$2,365.74	$2,001.98	$2,128.68	$2,149.26	$2,776.89
	Median	$2,177	$2,147	$2,081	$2,134	.	$1,987	$2,281	$2,027	$2,129	$2,241	$2,777

On-Island Expenditures Tracking

YTD = $1,632.59
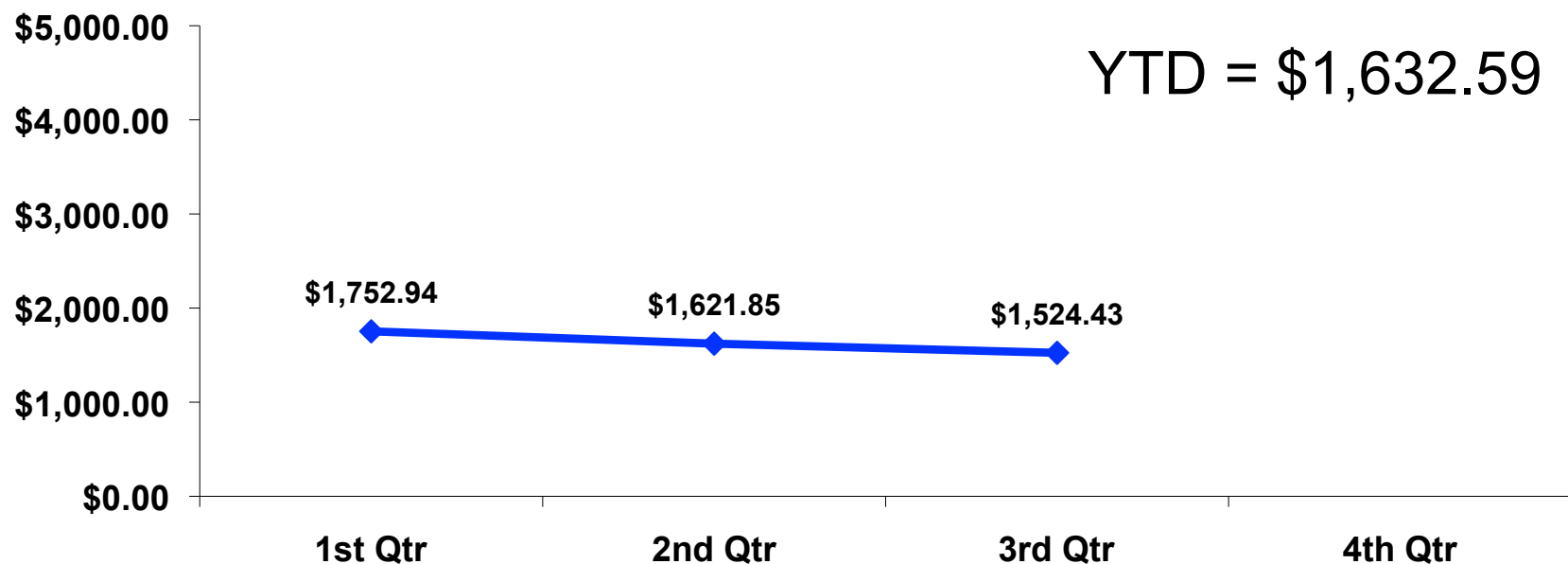
On-Island Expenditures
Per Person Segmentation

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
ONISLE	Mean	$1,524.43	$1,478.21	$1,472.21	$1,459.19	.	$1,374.32	$1,588.06	$1,378.55	$1,087.50	$1,215.29	$996.67
	Median	$1,250	$1,229	$1,250	$1,250	.	$1,119	$1,265	$1,113	$1,088	$1,185	$997

On-Island Expense Breakdown

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	$385.99	$428.52	$416.57	$371.45	.	$347.50	$417.98	$485.35	$350.00	$454.86	$275.00
	Median	$350	$400	$350	$350	.	$200	$400	$450	$350	$600	$275
F&B FF/STORE	Mean	$36.32	$30.99	$31.98	$32.27	.	$29.50	$34.36	$45.35	$90.00	$3.57	$0.00
	Median	$0	$0	$0	$0	.	$0	$0	$0	$90	$0	$0
F&B RESTRNT	Mean	$472.25	$493.81	$429.21	$444.73	.	$519.00	$456.49	$489.53	$100.00	$492.86	$1,600.00
	Median	$350	$350	$350	$320	.	$360	$350	$300	$100	$250	$1,600
OPT TOUR	Mean	$325.70	$342.94	$387.33	$357.82	.	$364.25	$330.43	$316.05	$215.00	$242.86	$225.00
	Median	$300	$325	$360	$300	.	$225	$355	$200	$215	$200	$225
GIFT- SELF	Mean	$1,124.10	$1,227.69	$1,005.19	$1,130.27	.	$1,228.10	$1,171.70	$1,870.70	$225.00	$575.00	$150.00
	Median	$600	$700	$600	$650	.	$675	$600	$940	$225	$275	$150
GIFT- OTHER	Mean	$439.21	$465.16	$452.28	$248.73	.	$378.25	$487.66	$436.28	$1,075.00	$221.43	$325.00
	Median	$200	$200	$200	$200	.	$200	$200	$200	$1,075	$200	$325
TRANS	Mean	$221.02	$250.64	$239.05	$187.87	.	$252.03	$235.88	$298.14	$120.00	$60.00	$65.00
	Median	$130	$150	$150	$100	.	$190	$140	$190	$120	$50	$65
OTHER	Mean	$156.03	$161.51	$165.84	$124.73	.	$99.75	$185.43	$164.42	$0.00	$208.57	$25.00
	Median	$100	$100	$100	$100	.	$100	$115	$100	$0	$150	$25
TOTAL	Mean	$3,174.38	$3,417.77	$3,121.80	$2,946.60	.	$3,224.13	$3,339.61	$4,173.95	$2,175.00	$2,259.14	$2,665.00
	Median	$2,520	$2,620	$2,520	$2,500	.	$2,735	$2,620	$3,040	$2,175	$2,100	$2,665

Total Expenditures Tracking

YTD=$4,295.58

$4,491.55 $4,671.44

$3,733.93

$10,000.00			
$8,000.00			
$6,000.00			
$4,000.00			
$2,000.00			
$0.00			
1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
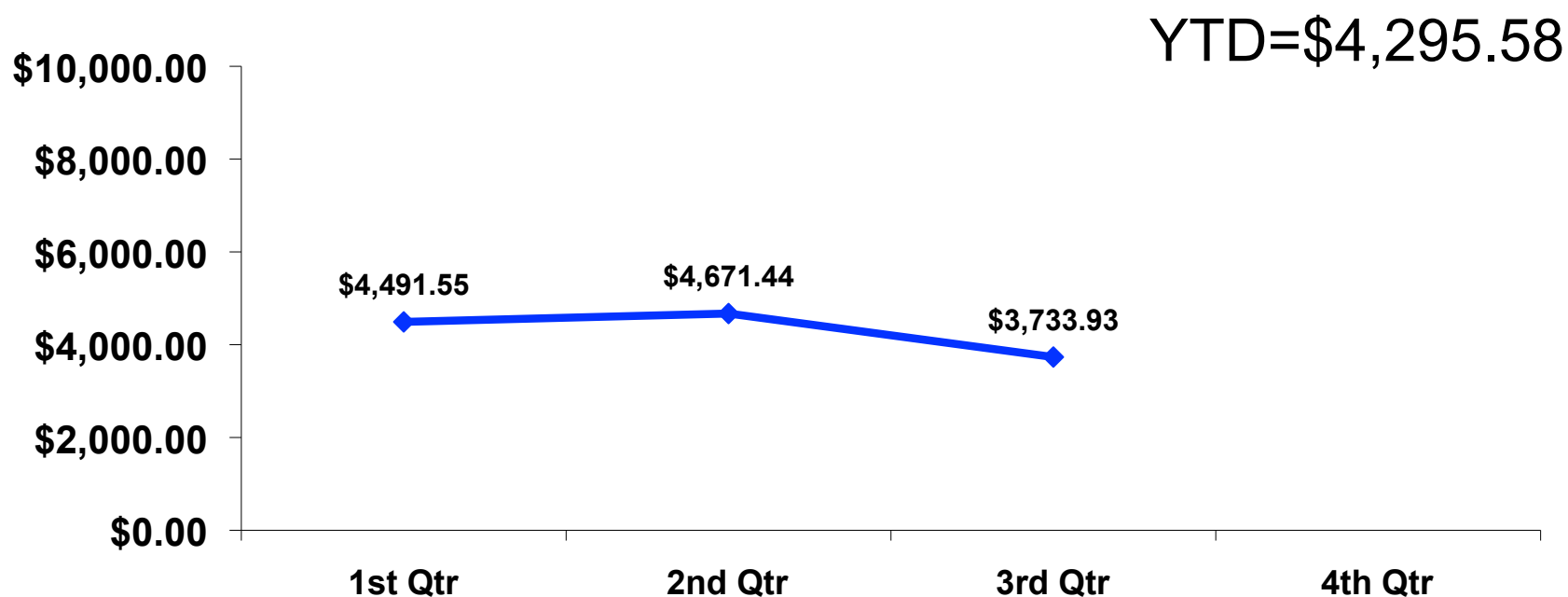
Total Expenditures
Per Person Segmentation

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
TOTPP	Mean	$3,733.93	$3,720.37	$3,734.26	$3,567.99	.	$3,318.34	$3,953.80	$3,380.53	$3,216.18	$3,364.54	$3,773.56
	Median	$3,461	$3,364	$3,381	$3,401	.	$3,149	$3,622	$3,091	$3,216	$3,241	$3,774

SECTION 4
ADVANCED STATISTICS

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.

Comparison of Drivers of Overall Satisfaction, 1st Qtr 2012, 2nd,3rd Qtr 2013 and Overall 1st Qtr 2012-3rd Qtr 2013				
Drivers:	1st Qtr 2012 rank	2nd Qtr 2013 rank	**3rd Qtr 2013 rank**	Combined 1st Qtr 2012, 2,3d Qtr 2013 rank
Quality & Cleanliness of beaches & parks	1			1
Ease of getting around		3		
Safety walking around at night	5		**3**	
Quality of daytime tours				
Variety of daytime tours	3			5
Quality of nighttime tours				
Variety of nighttime tours		5		
Quality of shopping		1	**2**	2
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations	2	2		3
Quality/cleanliness of air, sky				
Quality/cleanliness of parks				
Quality of landscape in Tumon	4	6		4
Quality of landscape in Guam				
Quality of ground handler				
Quality/cleanliness of transportation vehicles		4	**1**	
% of Per Person On Island Expenditures Accounted For	62.4%	75.8%	**74.8%**	64.4%
NOTE: Only significant drivers are included.				

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Russian visitor's experience on Guam is driven by three significant factors in the Third Quarter 2013 Period. By rank order they are:
    - **Quality/cleanliness of transportation vehicles,**
    - **Quality of shopping, and**
    - **Safety walking around at night.**
- With all three factors the overall r^2 is .748 meaning that **74.8% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, 1st Qtr 2012, 2nd Qtr 2013 and Overall 1st Qtr 2012, 2nd & 3rd Qtr 2013				
	1st Qtr 2012	2nd Qtr 2013	**3rd Qtr 2013**	Combined 1st Qtr 2012, 2nd & 3rd Qtr 2013
Drivers:	rank	rank	**rank**	rank
Quality & Cleanliness of beaches & parks				
Ease of getting around	1			
Safety walking around at night				
Quality of daytime tours		1		
Variety of daytime tours		3		2
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				3
Quality of landscape in Tumon				
Quality of landscape in Guam		2		1
Quality of ground handler				
Quality/cleanliness of transportation vehicles				
% of Per Person On Island Expenditures Accounted For	3.8%	19.0%	**0.0%**	9.1%
NOTE: Only significant drivers are included.				

Drivers of Per Person On-Island Expenditure

- **Per Person On Island Expenditure** of Russian visitors on Guam is driven by no significant factors in the third quarter 2013 Period.