



GUAM VISITORS BUREAU

Russia Visitor Tracker Exit Profile

FY2013 Market Segmentation

4th Qtr. (JUL~SEPT 2013)



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.

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

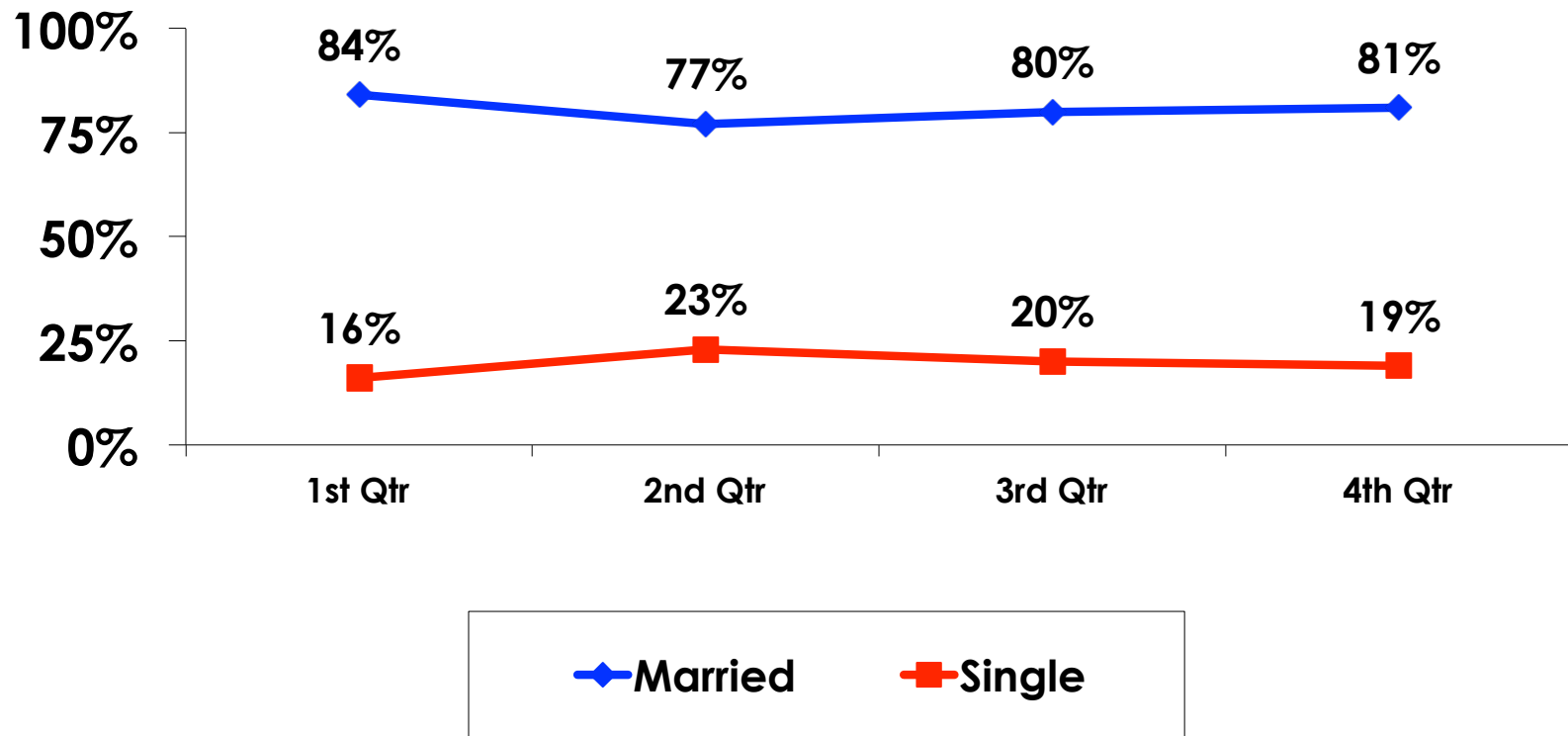
- Families – Q.6
- Adventure traveler – Q.18/19/23
- Wife – Q.E/ Gender
- MICE– Q.5A
- 18-35 – Q.F
- 36-55 – Q.F
- Child – Q.6
- Wedding/ Honeymoon – Q.5A
- Senior – Q.F
- Sports competition – Q.5A

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
Families	72%	89%	83%	80%
Adventure traveler	89%	68%	67%	53%
Wives	39%	33%	36%	38%
MICE	-	-	-	-
18-35	34%	27%	27%	33%
36-55	59%	66%	62%	52%
Child	29%	23%	29%	47%
Wedding/ Honeymoon	-	1%	1%	1%
Seniors (60+)	2%	3%	5%	9%
Sports Competition	6%	1%	1%	1%
TOTAL	150	151	150	150

SECTION 1 **PROFILE OF RESPONDENTS**

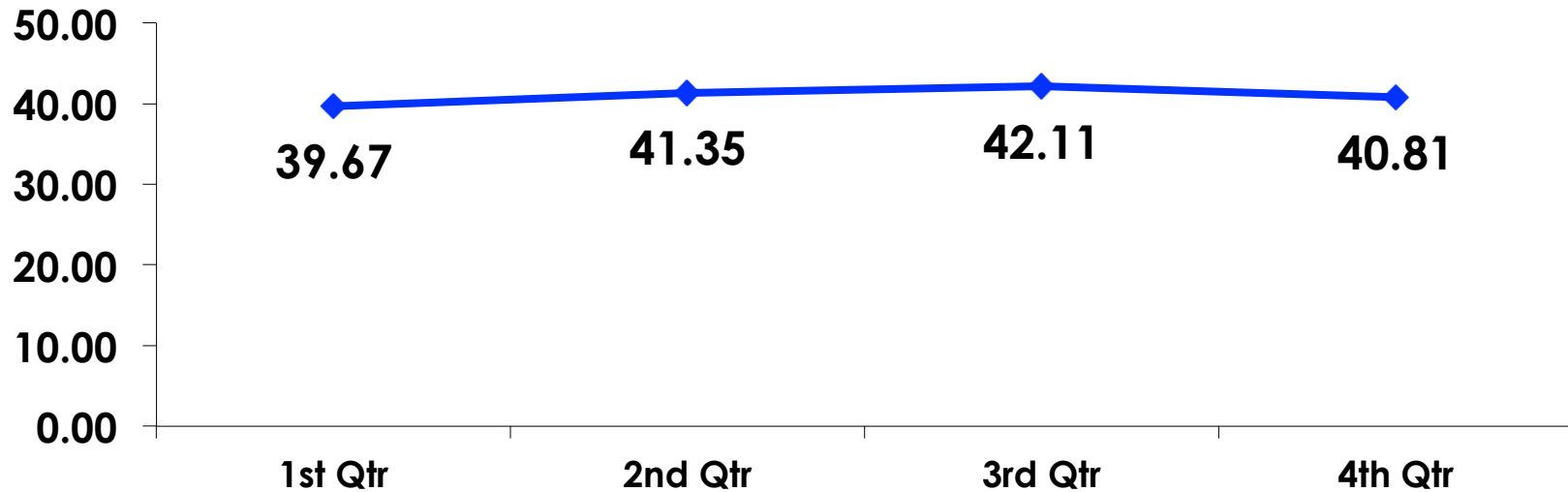
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QE	Married	Count	121	106	62	57		40	65	61	2	11	1
		Column N %	81%	88%	78%	100%		80%	83%	87%	100%	79%	100%
	Single	Count	29	14	18			10	13	9		3	
		Column N %	19%	12%	23%			20%	17%	13%		21%	
	Total	Count	150	120	80	57		50	78	70	2	14	1

AVERAGE AGE - TRACKING



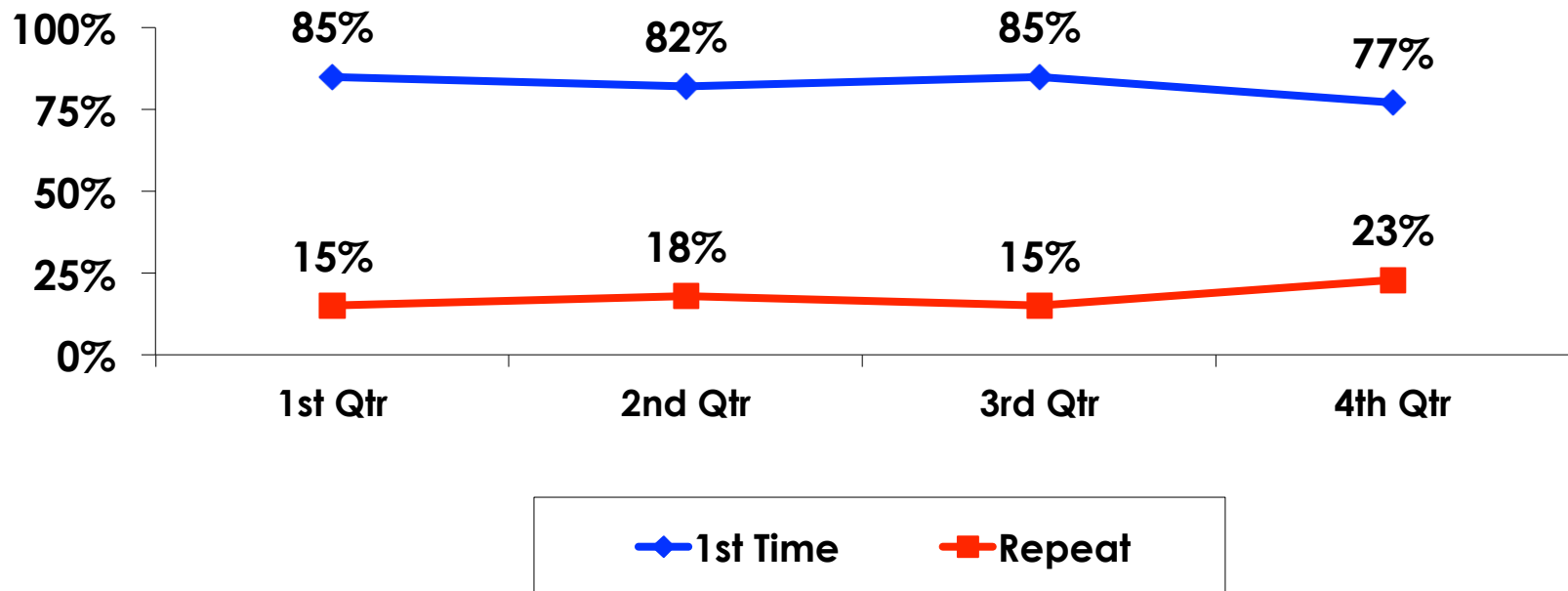
AGE- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	7	4	7	2		7			1		
		Column N %	5%	3%	9%	4%		14%			50%		
	25-34	Count	36	28	22	16		36		21	1		
		Column N %	24%	23%	28%	28%		72%		30%	50%		
	35-49	Count	78	70	39	29		7	71	42			1
		Column N %	52%	58%	49%	51%		14%	91%	60%			100%
	50+	Count	29	18	12	10			7	7		14	
		Column N %	19%	15%	15%	18%			9%	10%		100%	
	Total	Count	150	120	80	57		50	78	70	2	14	1
QF	Mean		40.81	40.11	38.56	40.61		30.10	41.87	38.86	28.00	63.86	49.00

INCOME - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q27	<732,321	Count	25	15	13	11		6	10	10	1	6	
		Column N %	17%	13%	17%	20%		12%	14%	15%	50%	43%	
	732,321-1,098,481	Count	40	30	16	16		13	22	15	1	3	
		Column N %	27%	26%	21%	29%		26%	30%	22%	50%	21%	
	1,098,482-1,464,642	Count	29	27	17	12		9	16	16		2	
		Column N %	20%	23%	22%	21%		18%	22%	24%		14%	
	1,464,643-1,830,803	Count	13	11	8	3		5	6	6		1	
		Column N %	9%	9%	10%	5%		10%	8%	9%		7%	
	1,830,803-2,263,124	Count	16	15	11	7		6	8	12		2	
		Column N %	11%	13%	14%	13%		12%	11%	18%		14%	
	2,563,125-3,661,606	Count	10	9	5	3		5	5	4			1
		Column N %	7%	8%	6%	5%		10%	7%	6%			100%
	3,661,607+	Count	12	10	7	4		5	7	5			
		Column N %	8%	9%	9%	7%		10%	9%	7%			
	No Income	Count	1		1			1					
		Column N %	1%		1%			2%					
	Total	Count	146	117	78	56		50	74	68	2	14	1

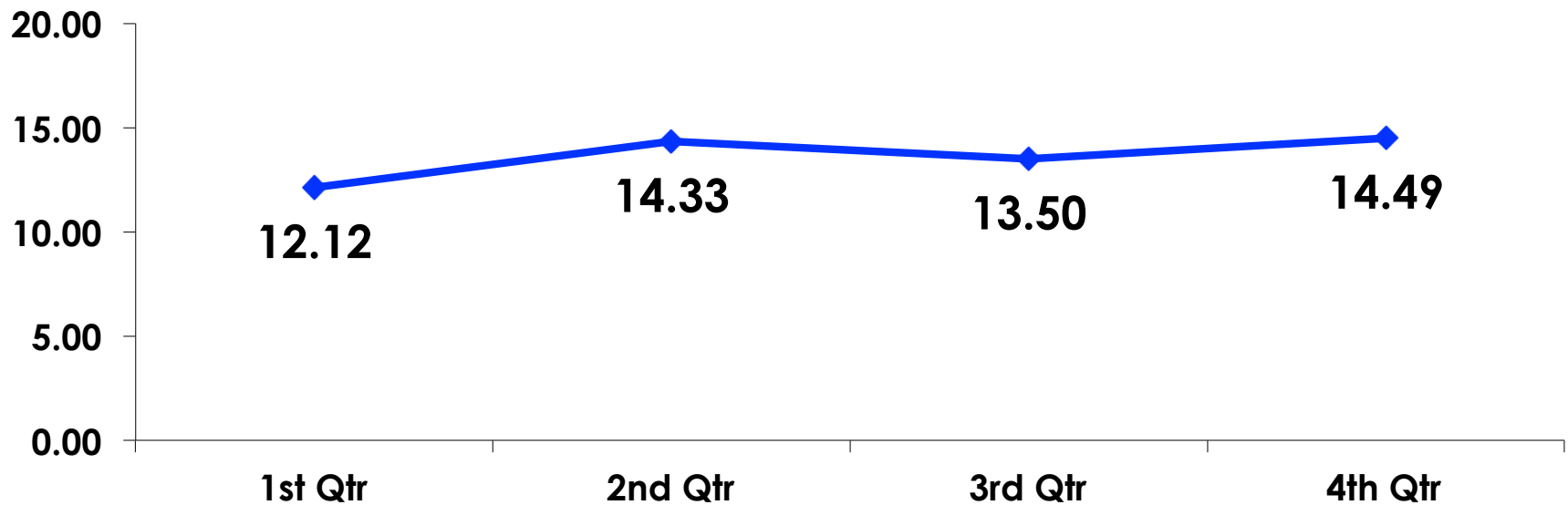
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	116	89	66	42		31	66	46	1	12	1
		Column N %	77%	74%	83%	74%		62%	85%	66%	50%	86%	100%
	No	Count	34	31	14	15		19	12	24	1	2	
		Column N %	23%	26%	18%	26%		38%	15%	34%	50%	14%	
	Total	Count	150	120	80	57		50	78	70	2	14	1

AVG LENGTH OF STAY - TRACKING



AVG LENGTH OF STAY - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q8	1-2	Count	1	1	1	1			1	1			
		Column N %	1%	1%	1%	2%			1%	1%			
	3	Count	1	1	1				1				
		Column N %	1%	1%	1%				1%				
	4+	Count	148	118	78	56		50	76	69	2	14	1
		Column N %	99%	98%	98%	98%		100%	97%	99%	100%	100%	100%
	Total	Count	150	120	80	57		50	78	70	2	14	1
Q8	Mean		14.49	14.52	14.65	14.44		14.26	14.51	15.03	14.00	15.14	10.00
	Median		14	14	14	14		14	14	14	14	15	10

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	46	40	32	13		11	27	26		7	1
		Column N %	31%	34%	40%	23%		22%	35%	38%		50%	100%
	Free-time package tour	Count	58	51	31	21		19	34	27	1	2	
		Column N %	39%	43%	39%	38%		39%	44%	39%	50%	14%	
	Individually arranged travel (FIT)	Count	43	28	17	20		19	17	16	1	4	
		Column N %	29%	24%	21%	36%		39%	22%	23%	50%	29%	
	Company paid travel	Count	1			1							
		Column N %	1%			2%							
	Other	Count	1			1						1	
		Column N %	1%			2%						7%	
	Total	Count	149	119	80	56		49	78	69	2	14	1

TRAVEL MOTIVATION - SEGMENTATION

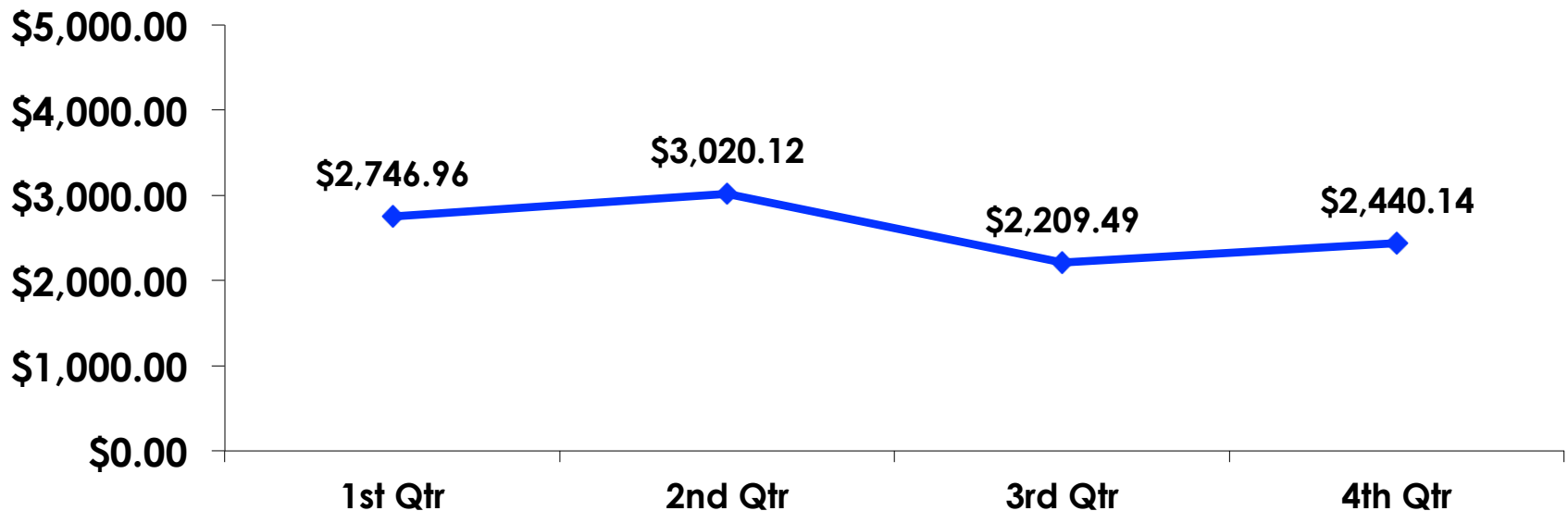
			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q5A	Natural beauty	Count	138	113	75	51		45	73	66	2	13	1
		Column N %	92%	94%	94%	89%		90%	94%	94%	100%	93%	100%
	No Visa required	Count	134	108	73	52		45	71	61	2	13	
		Column N %	89%	90%	91%	91%		90%	91%	87%	100%	93%	
	Relax	Count	111	88	57	41		32	63	53	1	9	1
		Column N %	74%	73%	71%	72%		64%	81%	76%	50%	64%	100%
	Short travel time	Count	92	79	51	37		27	56	46		4	1
		Column N %	61%	66%	64%	65%		54%	72%	66%		29%	100%
	Pleasure	Count	56	48	35	20		17	31	25		5	
		Column N %	37%	40%	44%	35%		34%	40%	36%		36%	
	Safe	Count	53	46	30	21		13	31	25		6	1
		Column N %	35%	38%	38%	37%		26%	40%	36%		43%	100%
	Shopping	Count	43	33	25	22		17	20	24		4	1
		Column N %	29%	28%	31%	39%		34%	26%	34%		29%	100%
	Recomm- friend/family/trv agnt	Count	32	22	20	12		10	18	10		4	
		Column N %	21%	18%	25%	21%		20%	23%	14%		29%	
	Previous trip	Count	32	29	14	14		18	12	23	1	1	
		Column N %	21%	24%	18%	25%		36%	15%	33%	50%	7%	
	Visit friends/ Relatives	Count	7	5	4	4		4	3	3		1	
		Column N %	5%	4%	5%	7%		8%	4%	4%	50%		
	Price	Count	7	5	4	1		2	5	3			
		Column N %	5%	4%	5%	2%		4%	6%	4%			
	Water sports	Count	5	4	5	1		2	2	1			
		Column N %	3%	3%	6%	2%		4%	3%	1%			
	Other	Count	3	3	1	1		3		2			
		Column N %	2%	3%	1%	2%		6%		3%			
	Company/ Business Trip	Count	2	2					1	1		1	
		Column N %	1%	2%					1%	1%		7%	
	Scuba	Count	2	1	1			1	1	1			
		Column N %	1%	1%	1%			2%	1%	1%			
	Organized sports	Count	1	1					1				1
		Column N %	1%	1%					1%				100%
	Honeymoon	Count	1	1	1			1			1		
		Column N %	1%	1%	1%			2%			50%		
	Married/ Attn wedding	Count	1	1	1			1			1		
		Column N %	1%	1%	1%			2%			50%		
	Company Sponsored	Count	1	1		1			1	1			
		Column N %	1%	1%		2%			1%	1%			
	Total	Count	150	120	80	57		50	78	70	2	14	1

INFORMATION SOURCES - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q1	Internet	Count	102	85	60	35		32	61	52	1	7	1
		Column N %	68%	71%	75%	61%		64%	78%	74%	50%	50%	100%
	Friend/ Relative	Count	98	76	57	38		33	48	42	2	11	1
		Column N %	65%	63%	71%	67%		66%	62%	60%	100%	79%	100%
	Travel Agent Brochure	Count	31	27	21	12		10	18	11		1	
		Column N %	21%	23%	26%	21%		20%	23%	16%		7%	
	TV	Count	31	28	23	11		13	16	17		1	
		Column N %	21%	23%	29%	19%		26%	21%	24%		7%	
	Prior Trip	Count	29	26	12	13		17	9	20	1	2	
		Column N %	19%	22%	15%	23%		34%	12%	29%	50%	14%	
	Other	Count	10	5	6	6		7	2	4			
		Column N %	7%	4%	8%	11%		14%	3%	6%			
	Magazine (Consumer)	Count	6	5	5	3		2	4	4			
		Column N %	4%	4%	6%	5%		4%	5%	6%			
	Travel Guidebook- Bookstore	Count	4	4	2	1		1	3	3			
		Column N %	3%	3%	3%	2%		2%	4%	4%			
	GVB Office	Count	3	2	2	2		1	1				
		Column N %	2%	2%	3%	4%		2%	1%				
	Consumer Trvl Show	Count	1	1		1			1				
		Column N %	1%	1%		2%			1%				
	GVB Promo	Count	1	1	1				1				
		Column N %	1%	1%	1%				1%				
	Newspaper	Count	1		1			1					
		Column N %	1%		1%			2%					
	Total	Count	150	120	80	57		50	78	70	2	14	1

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING

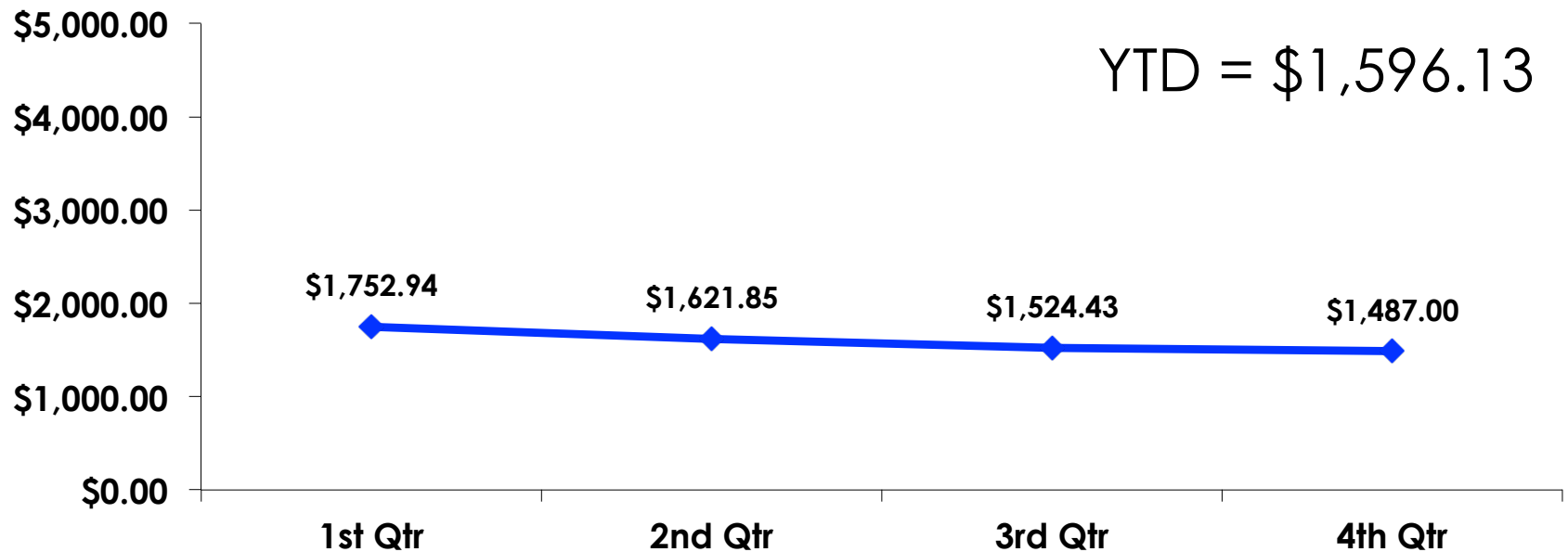


YTD=\$2,603.50

PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
RUB\$	Mean	\$2,440.14	\$2,550.32	\$2,479.47	\$2,284.03	.	\$2,437.69	\$2,583.57	\$2,273.53	\$1,970.07	\$1,993.16	\$2,412.95
	Median	\$2,482	\$2,609	\$2,718	\$2,443	.	\$2,482	\$2,527	\$2,291	\$1,970	\$2,482	\$2,413

ON-ISLAND EXPENDITURES - TRACKING



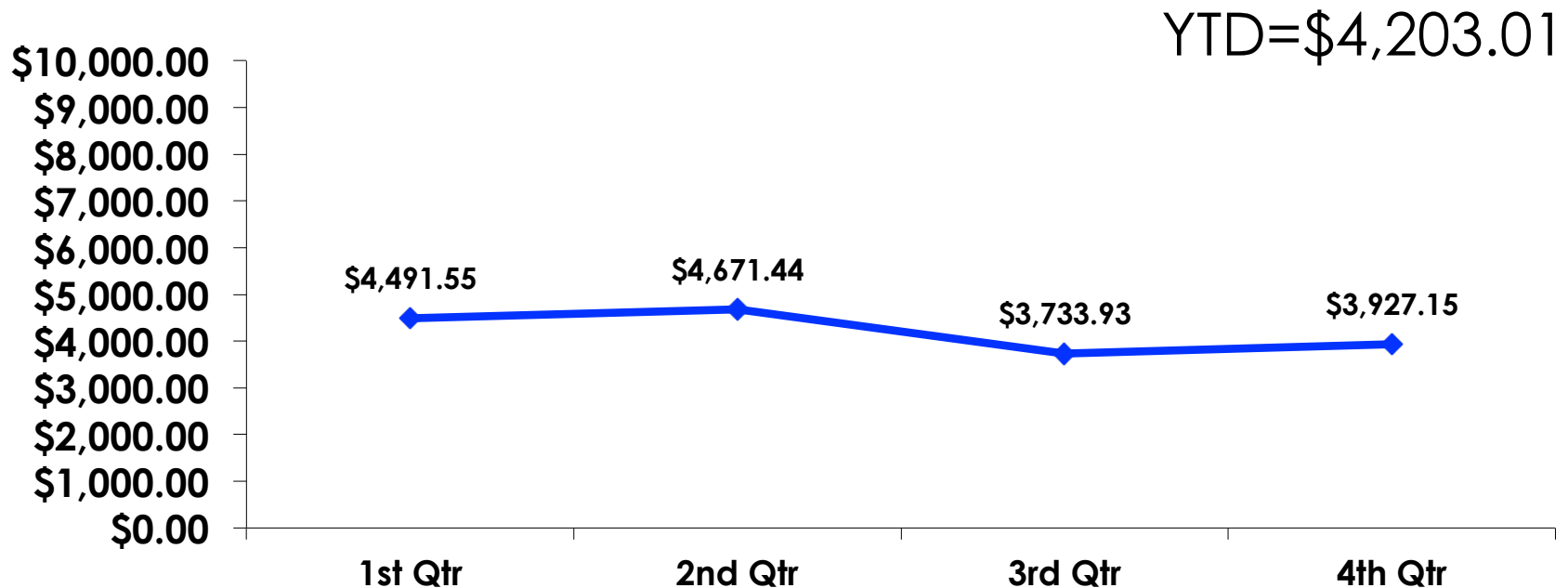
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
ONISLE	Mean	\$1,487.00	\$1,407.55	\$1,453.21	\$1,529.96	.	\$1,454.17	\$1,534.11	\$1,176.55	\$1,145.00	\$1,369.76	\$1,350.00
	Median	\$1,217	\$1,150	\$1,198	\$1,167	.	\$1,242	\$1,150	\$850	\$1,145	\$1,345	\$1,350

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$364.15	\$418.60	\$335.40	\$312.28	.	\$393.20	\$408.36	\$473.57	\$150.00	\$129.29	\$0.00
	Median	\$175	\$300	\$125	\$0	.	\$265	\$300	\$100	\$150	\$0	\$0
F&B FF/STORE	Mean	\$51.41	\$49.77	\$69.03	\$41.93	.	\$59.40	\$57.95	\$66.71	\$100.00	\$15.71	\$0.00
	Median	\$0	\$0	\$0	\$0	.	\$0	\$0	\$0	\$100	\$0	\$0
F&B RESTRNT	Mean	\$501.73	\$530.42	\$578.38	\$481.93	.	\$473.40	\$537.18	\$461.86	\$300.00	\$427.86	\$600.00
	Median	\$400	\$400	\$450	\$350	.	\$400	\$400	\$325	\$300	\$300	\$600
OPT TOUR	Mean	\$325.73	\$362.58	\$481.38	\$294.74	.	\$303.20	\$378.21	\$414.43	\$200.00	\$228.57	\$400.00
	Median	\$200	\$275	\$325	\$200	.	\$175	\$300	\$200	\$200	\$75	\$400
GIFT- SELF	Mean	\$1,158.73	\$1,230.92	\$1,203.25	\$1,123.16	.	\$1,282.80	\$1,212.44	\$1,284.43	\$1,150.00	\$692.86	\$1,000.00
	Median	\$600	\$675	\$600	\$600	.	\$650	\$600	\$600	\$1,150	\$750	\$1,000
GIFT- OTHER	Mean	\$496.93	\$507.83	\$515.63	\$628.07	.	\$445.60	\$546.79	\$533.00	\$200.00	\$561.43	\$200.00
	Median	\$300	\$300	\$300	\$300	.	\$300	\$300	\$300	\$200	\$325	\$200
TRANS	Mean	\$209.84	\$231.63	\$224.69	\$151.60	.	\$198.90	\$227.71	\$208.36	\$190.00	\$217.14	\$350.00
	Median	\$150	\$150	\$150	\$120	.	\$140	\$150	\$125	\$190	\$125	\$350
OTHER	Mean	\$171.27	\$190.67	\$99.00	\$284.56	.	\$177.00	\$184.62	\$153.14	\$0.00	\$131.43	\$150.00
	Median	\$100	\$100	\$25	\$70	.	\$0	\$100	\$0	\$0	\$100	\$150
TOTAL	Mean	\$3,273.04	\$3,513.55	\$3,494.69	\$3,300.72	.	\$3,314.50	\$3,552.45	\$3,594.07	\$2,290.00	\$2,404.29	\$2,700.00
	Median	\$2,598	\$2,725	\$2,905	\$2,615	.	\$2,565	\$2,700	\$2,875	\$2,290	\$2,180	\$2,700

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	\$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 ($p \leq .05$) 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,2nd,3rd and 4th Qtr 2013 and Overall 1st-4th Qtr 2013					
	1st Qtr 2012	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	Combined 1st to 4Qtr 2013
Drivers:	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	1				1
Ease of getting around		3			
Safety walking around at night	5		3		
Quality of daytime tours				1	
Variety of daytime tours	3				5
Quality of nighttime tours					
Variety of nighttime tours		5			
Quality of shopping		1	2		2
Variety of shopping				3	
Price of things on Guam					
Quality of hotel accommodations	2	2			3
Quality/cleanliness of air, sky				2	
Quality/cleanliness of parks					
Quality of landscape in Tumon	4	6			
Quality of landscape in Guam					4
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%	69.7%	62.6%

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 Fourth Quarter 2013 Period. By rank order they are:
 - **Quality of daytime tours,**
 - **Quality/cleanliness of air, sky, and**
 - **Variety of shopping.**
- With all three factors the overall r^2 is .697 meaning that **69.7% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, 1st,2nd,3rd and 4th Qtr 2013 and Overall 1st to 4th Qtr 2013					
	1st Qtr 2012	2nd Qtr 2013	3rd Qtr 2013	4th Qtr 2013	Combined 1-4th Qtr 2013
Drivers:	rank	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			1
Quality of nighttime tours					
Variety of nighttime tours					
Quality of shopping				1	
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			2
Quality of ground handler					
Quality/cleanliness of transportation vehicles					
% of Per Person On Island Expenditures Accounted For	3.8%	19.0%	0.0%	8.2%	6.3%

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 one significant factor in the fourth quarter 2013 Period. That factor is:
 - **Quality of shopping.**
- This factor has an overall r^2 of .082 meaning that **8.2% of per person on island expenditure is accounted for by this factor.**