



GUAM VISITORS BUREAU

Russia Visitor Tracker Exit Profile

FY2014 Market Segmentation

2nd Quarter (January-March 2014)



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 **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

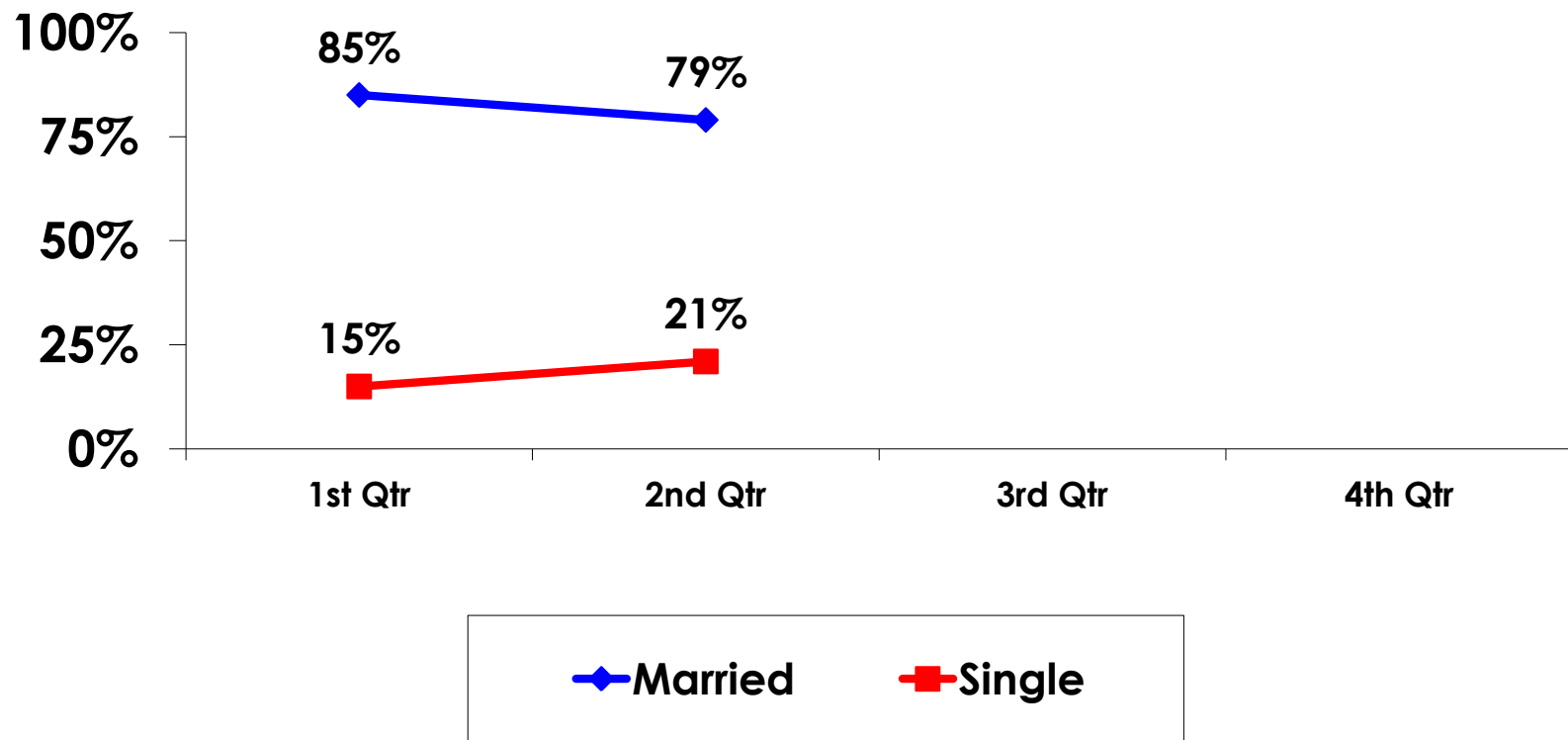
- Families – Q.6
- Adventure traveler – Q.18/19/23
- Wife – Q.E/ Gender
- MICE– Q.5A
- 18-35 – Q.F
- 36-55 – Q.F
- Child – Q.6
- Wedding/ Honeymoon – Q.5A
- Senior – Q.F
- Sports competition – Q.5A

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
Families	68%	71%		
Adventure traveler	66%	68%		
Wives	38%	33%		
MICE	-	-		
18-35	26%	33%		
36-55	56%	53%		
Child	21%	19%		
Wedding/ Honeymoon	-	7%		
Seniors (60+)	10%	7%		
Sports Competition	2%	1%		
TOTAL	151	150		

SECTION 1 **PROFILE OF RESPONDENTS**

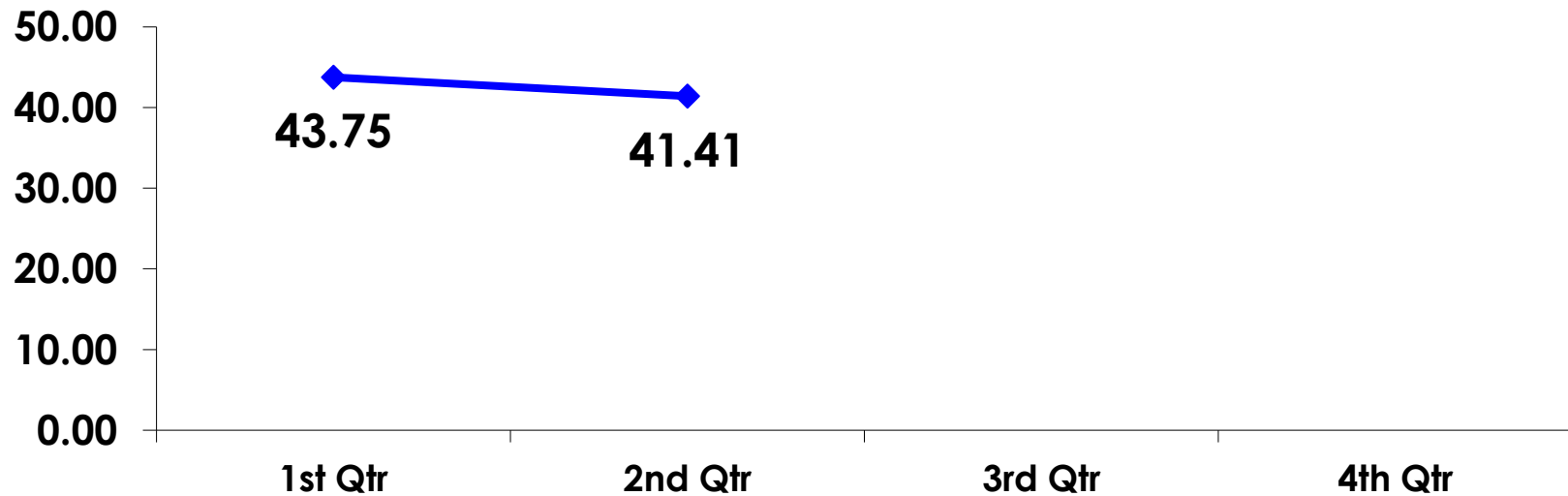
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QE	Married	Count	118	97	79	50		30	73	26	9	6	
		Column N %	79%	91%	78%	100%		60%	92%	93%	82%	60%	
	Single	Count	31	10	22			20	6	2	2	4	
		Column N %	21%	9%	22%			40%	8%	7%	18%	40%	
	Total	Count	149	107	101	50		50	79	28	11	10	

AVERAGE AGE - TRACKING



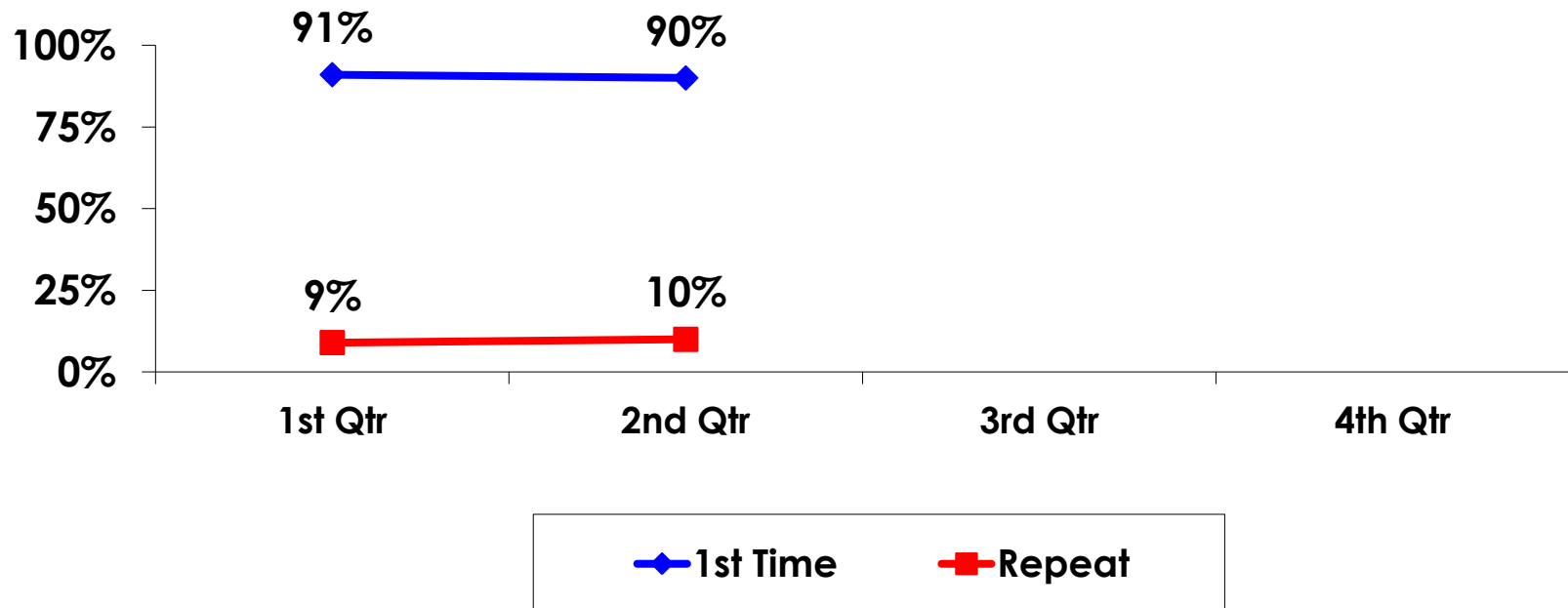
AGE- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	8	3	8	1		8			2		
		Column N %	5%	3%	8%	2%		16%			18%		
	25-34	Count	41	26	30	13		41		11	1		
		Column N %	28%	25%	29%	26%		82%		41%	9%		
	35-49	Count	59	48	43	23		1	58	11	7		1
		Column N %	40%	45%	42%	46%		2%	73%	41%	64%		100%
	50+	Count	41	29	21	13			22	5	1	10	
		Column N %	28%	27%	21%	26%			28%	19%	9%	100%	
	Total	Count	149	106	102	50		50	80	27	11	10	1
QF	Mean		41.41	42.35	39.34	41.82		28.38	44.88	39.70	38.73	64.70	39.00

INCOME - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q27	<732,321	Count	38	22	27	15		21	12	7	1	4	
		Column N %	26%	21%	27%	31%		43%	15%	25%	9%	44%	
	732,321-1,098,481	Count	49	32	34	16		17	25	5	1	2	
		Column N %	33%	30%	34%	33%		35%	32%	18%	9%	22%	
	1,098,482-1,464,642	Count	21	18	10	10		6	13	8	2	1	
		Column N %	14%	17%	10%	20%		12%	16%	29%	18%	11%	
	1,464,643-1,830,803	Count	14	11	11	5		2	10	2		1	1
		Column N %	10%	10%	11%	10%		4%	13%	7%		11%	100%
	1,830,803-2,263,124	Count	12	10	8	3		1	8	2	2	1	
		Column N %	8%	10%	8%	6%		2%	10%	7%	18%	11%	
	2,563,125-3,661,606	Count	9	9	8			1	8	3	4		
		Column N %	6%	9%	8%			2%	10%	11%	36%		
	3,661,607+	Count	3	2	1				3	1	1		
		Column N %	2%	2%	1%				4%	4%	9%		
	No Income	Count	1	1	1			1					
		Column N %	1%	1%	1%			2%					
	Total	Count	147	105	100	49		49	79	28	11	9	1

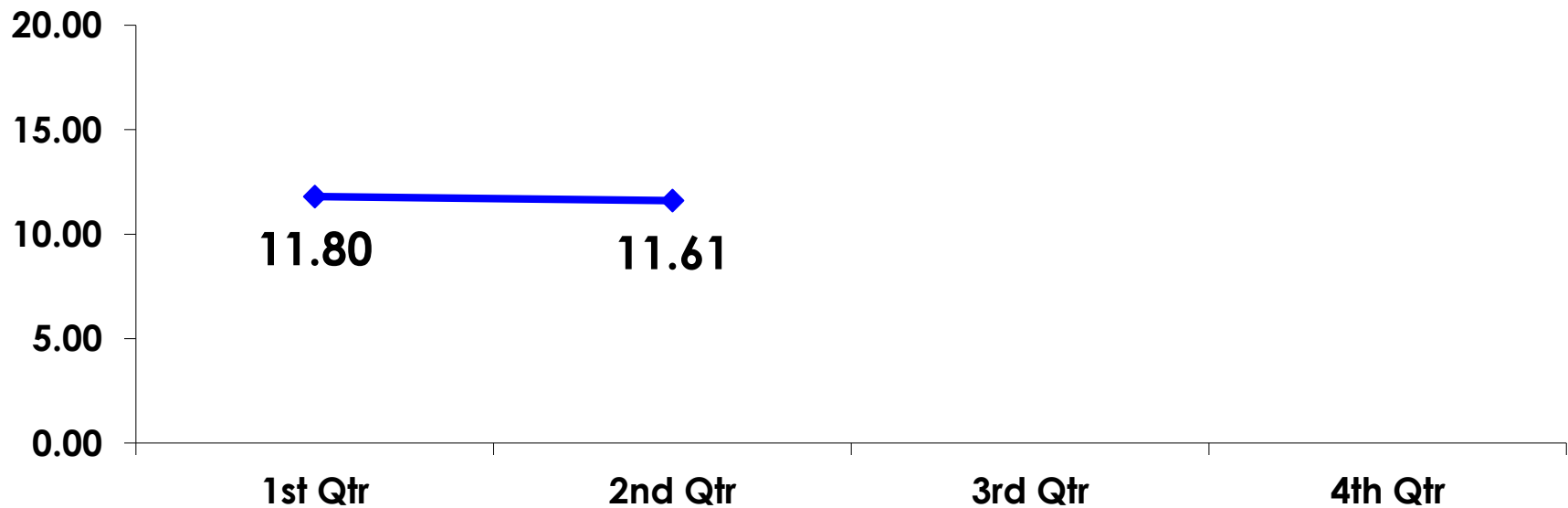
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	135	96	92	43		47	69	24	11	10	1
		Column N %	90%	90%	90%	86%		94%	86%	86%	100%	100%	100%
	No	Count	15	11	10	7		3	11	4			
		Column N %	10%	10%	10%	14%		6%	14%	14%			
	Total	Count	150	107	102	50		50	80	28	11	10	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	4	4	2	1		2	1			1	
		Column N %	3%	4%	2%	2%		4%	1%			10%	
	3	Count	2	1	1	1		1	1				
		Column N %	1%	1%	1%	2%		2%	1%				
	4+	Count	142	102	97	47		46	77	28	11	9	1
		Column N %	96%	95%	97%	96%		94%	97%	100%	100%	90%	100%
	Total	Count	148	107	100	49		49	79	28	11	10	1
Q8	Mean		11.61	11.29	12.22	11.29		11.63	11.62	12.96	8.55	9.50	13.00
	Median		13	13	13	13		8	13	14	8	9	13

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	61	52	37	22		8	37	19		7	
		Column N %	41%	49%	36%	44%		16%	46%	68%		70%	
	Free-time package tour	Count	66	38	47	27		32	30	9	2	3	1
		Column N %	44%	36%	46%	54%		64%	38%	32%	18%	30%	100%
	Individually arranged travel (FIT)	Count	19	16	14	1		7	12		9		
		Column N %	13%	15%	14%	2%		14%	15%		82%		
	Group tour	Count	2		2			1	1				
		Column N %	1%		2%			2%	1%				
	Company paid travel	Count	1		1			1					
		Column N %	1%		1%			2%					
	Other	Count	1	1	1			1					
		Column N %	1%	1%	1%			2%					
	Total	Count	150	107	102	50		50	80	28	11	10	1

TRAVEL MOTIVATION - SEGMENTATION

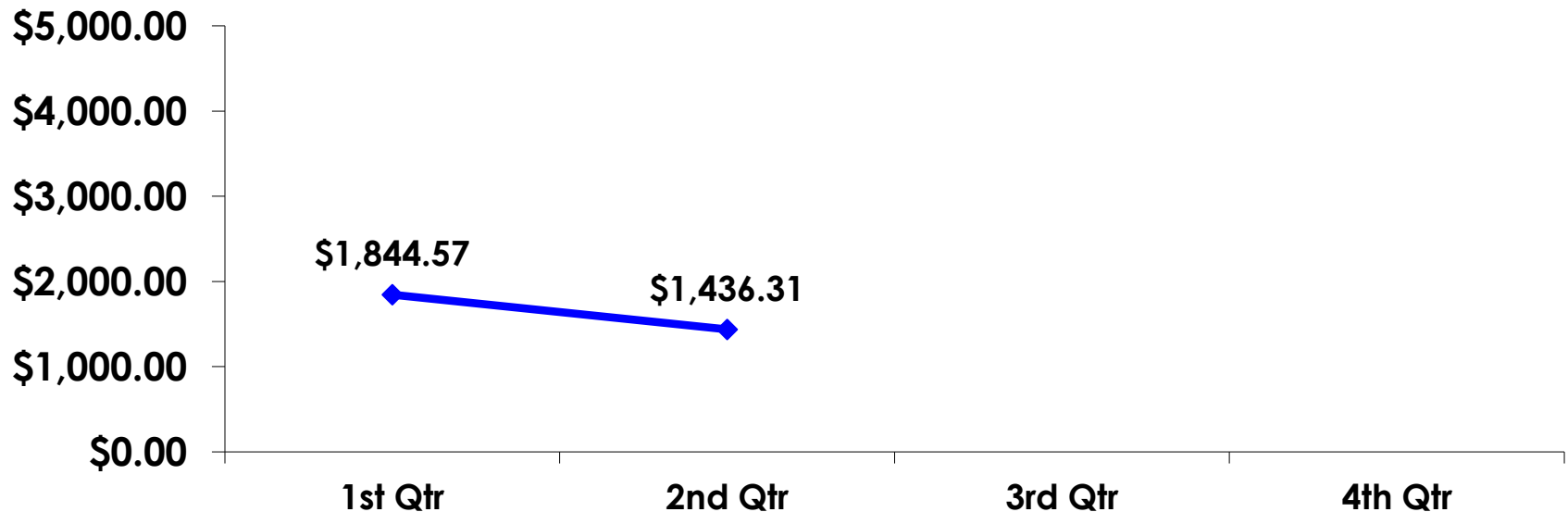
			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q5A	Natural beauty	Count	142	99	94	49		46	76	27	8	10	1
		Column N %	95%	93%	92%	98%		92%	95%	96%	73%	100%	100%
	No Visa required	Count	132	93	89	43		43	71	25	9	9	1
		Column N %	88%	87%	87%	86%		86%	89%	89%	82%	90%	100%
	Short travel time	Count	126	91	85	43		38	71	22	9	8	
		Column N %	84%	85%	83%	86%		76%	89%	79%	82%	80%	
	Relax	Count	92	68	60	31		29	48	17	3	9	
		Column N %	61%	64%	59%	62%		58%	60%	61%	27%	90%	
	Pleasure	Count	76	56	51	29		21	48	13	9	3	
		Column N %	51%	52%	50%	58%		42%	60%	46%	82%	30%	
	Recomm- friend/family/trvl agnt	Count	62	45	37	24		20	30	6	2	6	
		Column N %	41%	42%	36%	48%		40%	38%	21%	18%	60%	
	Safe	Count	60	38	41	26		19	35	8	2	2	
		Column N %	40%	36%	40%	52%		38%	44%	29%	18%	20%	
	Price	Count	54	34	36	21		26	20	10		6	
		Column N %	36%	32%	35%	42%		52%	25%	36%		60%	
	Shopping	Count	39	27	26	18		14	23	8			1
		Column N %	26%	25%	25%	36%		28%	29%	29%			100%
	Previous trip	Count	14	10	10	6		3	10	4			
		Column N %	9%	9%	10%	12%		6%	13%	14%			
	Water sports	Count	10	6	8	2		7	3				
		Column N %	7%	6%	8%	4%		14%	4%				
	Married/ Attn wedding	Count	9	8	7			2	7		9		
		Column N %	6%	7%	7%			4%	9%		82%		
	Scuba	Count	8	3	8	3		5	3	1	1		
		Column N %	5%	3%	8%	6%		10%	4%	4%	9%		
	Other	Count	6	4	5	3		3	2	1		1	
		Column N %	4%	4%	5%	6%		6%	3%	4%		10%	
	Company/ Business Trip	Count	6	4	4	1		3	1	2		1	
		Column N %	4%	4%	4%	2%		6%	1%	7%		10%	
	Visit friends/ Relatives	Count	5	3	3			2	2	1		1	
		Column N %	3%	3%	3%			4%	3%	4%		10%	
	Honeymoon	Count	2	2	2			1	1		2		
		Column N %	1%	2%	2%			2%	1%		18%		
	Company Sponsored	Count	2		1	1		1	1				
		Column N %	1%		1%	2%		2%	1%				
	Organized sports	Count	1		1				1				1
		Column N %	1%		1%				1%				100%
	Total	Count	150	107	102	50		50	80	28	11	10	1

INFORMATION SOURCES - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q1	Internet	Count	112	82	77	35		46	55	23	5	3	1
		Column N %	75%	77%	76%	70%		92%	69%	85%	45%	33%	100%
	Friend/ Relative	Count	109	78	74	32		37	55	17	10	9	1
		Column N %	73%	74%	73%	64%		74%	69%	63%	91%	100%	100%
	TV	Count	59	48	43	16		19	32	8		2	1
		Column N %	40%	45%	43%	32%		38%	40%	30%		22%	100%
	Travel Agent Brochure	Count	39	32	23	19		14	21	7		2	
		Column N %	26%	30%	23%	38%		28%	26%	26%		22%	
	GVB Promo	Count	28	22	20	11		8	16	3	1	2	
		Column N %	19%	21%	20%	22%		16%	20%	11%	9%	22%	
	Magazine (Consumer)	Count	21	18	17	10		6	13	3		1	
		Column N %	14%	17%	17%	20%		12%	16%	11%		11%	
	Newspaper	Count	19	15	14	11		7	11	3			
		Column N %	13%	14%	14%	22%		14%	14%	11%			
	Prior Trip	Count	15	11	10	7		3	11	4			
		Column N %	10%	10%	10%	14%		6%	14%	15%			
	Co-Worker/ Company Trvl Dept	Count	13	7	12	6		6	6	2			
		Column N %	9%	7%	12%	12%		12%	8%	7%			
	Radio	Count	8	6	5	6		1	6	2			
		Column N %	5%	6%	5%	12%		2%	8%	7%			
	Other	Count	7	2	6	3		4	3	2			
		Column N %	5%	2%	6%	6%		8%	4%	7%			
	Travel Guidebook- Bookstore	Count	3	2	3			1	1				
		Column N %	2%	2%	3%			2%	1%				
	Consumer Trvl Show	Count	2	2	1			2		1			
		Column N %	1%	2%	1%			4%		4%			
	Theater Ad	Count	1	1	1	1			1				
		Column N %	1%	1%	1%	2%			1%				
	Total	Count	149	106	101	50		50	80	27	11	9	1

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING

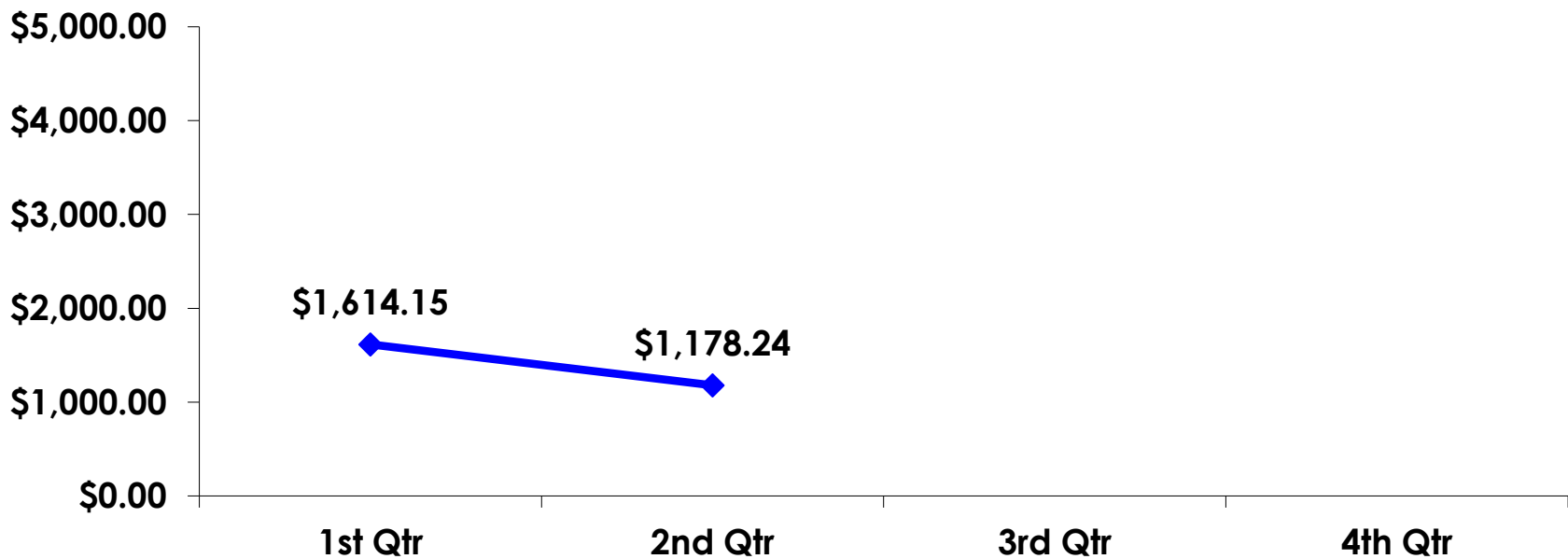


YTD=\$1,641.12

PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
RUB\$	Mean	\$1,436.31	\$1,501.91	\$1,474.79	\$1,471.70	.	\$1,029.76	\$1,625.27	\$1,680.53	\$1,082.28	\$1,501.13	\$1,075.27
	Median	\$1,316	\$1,321	\$1,316	\$1,339	.	\$898	\$1,379	\$1,368	\$920	\$1,457	\$1,075

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$1,396.91

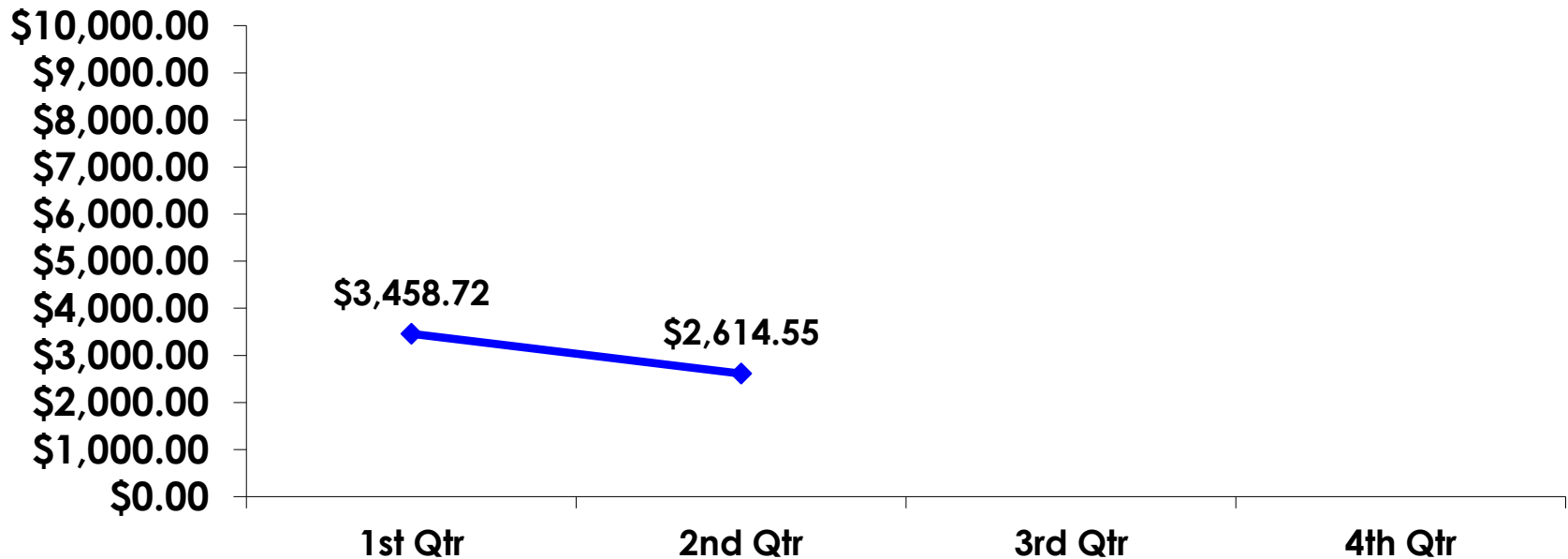
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
ONISLE	Mean	\$1,178.24	\$1,054.58	\$1,228.73	\$1,089.30	.	\$1,010.71	\$1,302.58	\$1,118.87	\$1,695.45	\$1,040.17	\$2,500.00
	Median	\$948	\$840	\$948	\$850	.	\$845	\$1,000	\$825	\$1,500	\$985	\$2,500

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$103.05	\$124.53	\$109.87	\$98.30	.	\$35.94	\$145.13	\$204.11	\$131.82	\$95.00	\$0.00
	Median	\$0	\$0	\$0	\$0	.	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$77.05	\$65.14	\$93.35	\$60.60	.	\$114.64	\$67.81	\$100.18	\$4.55	\$20.00	\$150.00
	Median	\$0	\$0	\$0	\$0	.	\$65	\$0	\$0	\$0	\$0	\$150
F&B RESTRNT	Mean	\$541.36	\$580.35	\$564.25	\$487.40	.	\$568.28	\$516.63	\$728.21	\$948.18	\$546.00	\$500.00
	Median	\$450	\$450	\$490	\$400	.	\$350	\$450	\$500	\$500	\$425	\$500
OPT TOUR	Mean	\$252.13	\$256.15	\$278.97	\$211.70	.	\$233.30	\$258.06	\$310.71	\$60.91	\$272.00	\$200.00
	Median	\$250	\$250	\$300	\$235	.	\$250	\$265	\$300	\$0	\$260	\$200
GIFT- SELF	Mean	\$711.97	\$822.99	\$770.00	\$493.70	.	\$363.40	\$943.31	\$1,169.64	\$1,404.55	\$311.00	\$1,500.00
	Median	\$350	\$400	\$400	\$325	.	\$290	\$500	\$450	\$1,600	\$200	\$1,500
GIFT- OTHER	Mean	\$280.87	\$296.36	\$251.03	\$251.70	.	\$215.10	\$320.06	\$338.57	\$509.09	\$275.00	\$150.00
	Median	\$200	\$200	\$200	\$200	.	\$200	\$200	\$225	\$400	\$200	\$150
TRANS	Mean	\$84.27	\$102.48	\$100.54	\$102.20	.	\$77.70	\$100.06	\$138.57	\$213.64	\$6.00	\$0.00
	Median	\$0	\$50	\$50	\$0	.	\$0	\$50	\$90	\$250	\$0	\$0
OTHER	Mean	\$82.47	\$91.17	\$97.01	\$109.20	.	\$93.30	\$82.56	\$214.29	\$54.55	\$110.00	\$0.00
	Median	\$0	\$0	\$0	\$0	.	\$0	\$0	\$25	\$0	\$0	\$0
TOTAL	Mean	\$2,138.61	\$2,333.74	\$2,283.34	\$1,800.20	.	\$1,702.02	\$2,443.63	\$3,162.14	\$3,327.27	\$1,635.00	\$2,500.00
	Median	\$1,505	\$1,700	\$1,800	\$1,445	.	\$1,300	\$1,945	\$2,000	\$3,000	\$1,145	\$2,500

TOTAL EXPENDITURES – TRACKING



YTD=\$3,038.03

TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
TOTPP	Mean	\$2,614.55	\$2,556.49	\$2,703.52	\$2,561.00	.	\$2,040.46	\$2,927.86	\$2,799.40	\$2,777.73	\$2,541.30	\$3,575.27
	Median	\$2,382	\$2,377	\$2,417	\$2,351	.	\$1,784	\$2,625	\$2,418	\$2,541	\$2,174	\$3,575

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, 2nd Qtr and Overall 1-2 Qtr 2014			
	1st Qtr	2nd Qtr	Combin ed 1-2 Qtr 2014
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks	3		2
Ease of getting around			4
Safety walking around at night			
Quality of daytime tours			5
Variety of daytime tours			
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			3
Quality/cleanliness of parks			
Quality of landscape in Tumon	1		1
Quality of landscape in Guam			
Quality of ground handler	2		6
Quality/cleanliness of transportation vehicles			
% of Per Person On Island Expenditures Accounted For	77.5%	21.4%	61.2%
NOTE: Only significant drivers are included.			

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Russian visitor's experience on Guam is driven by one significant factor in the Second Quarter 2014 Period. It is:
 - **Quality of shopping.**
- With this factor the overall r^2 is .214 meaning that **21.4% of overall satisfaction is accounted for by this factor.**

Comparison of Drivers of Per Person On Isle Expenditure, 1st,2nd Qtr and Overall 1-2 Qtr 2014			
	1st Qtr	2nd Qtr	Combin ed 1-2 Qtr
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks			
Ease of getting around			
Safety walking around at night			
Quality of daytime tours			
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours	2		
Quality of shopping	1		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	4		
Quality of landscape in Guam			
Quality of ground handler			
Quality/cleanliness of transportation vehicles			
% of Per Person On Island Expenditures Accounted For	38.5%	0.0%	10.1%
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 second quarter 2014 Period.