



GUAM VISITORS BUREAU

Russia Visitor Tracker Exit Profile

FY2014 Market Segmentation

3RD QTR (APR~JUN 2014)



Prepared by: QMark Research

Information contained herein is the property of the Guam Visitors Bureau.

The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.¹

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

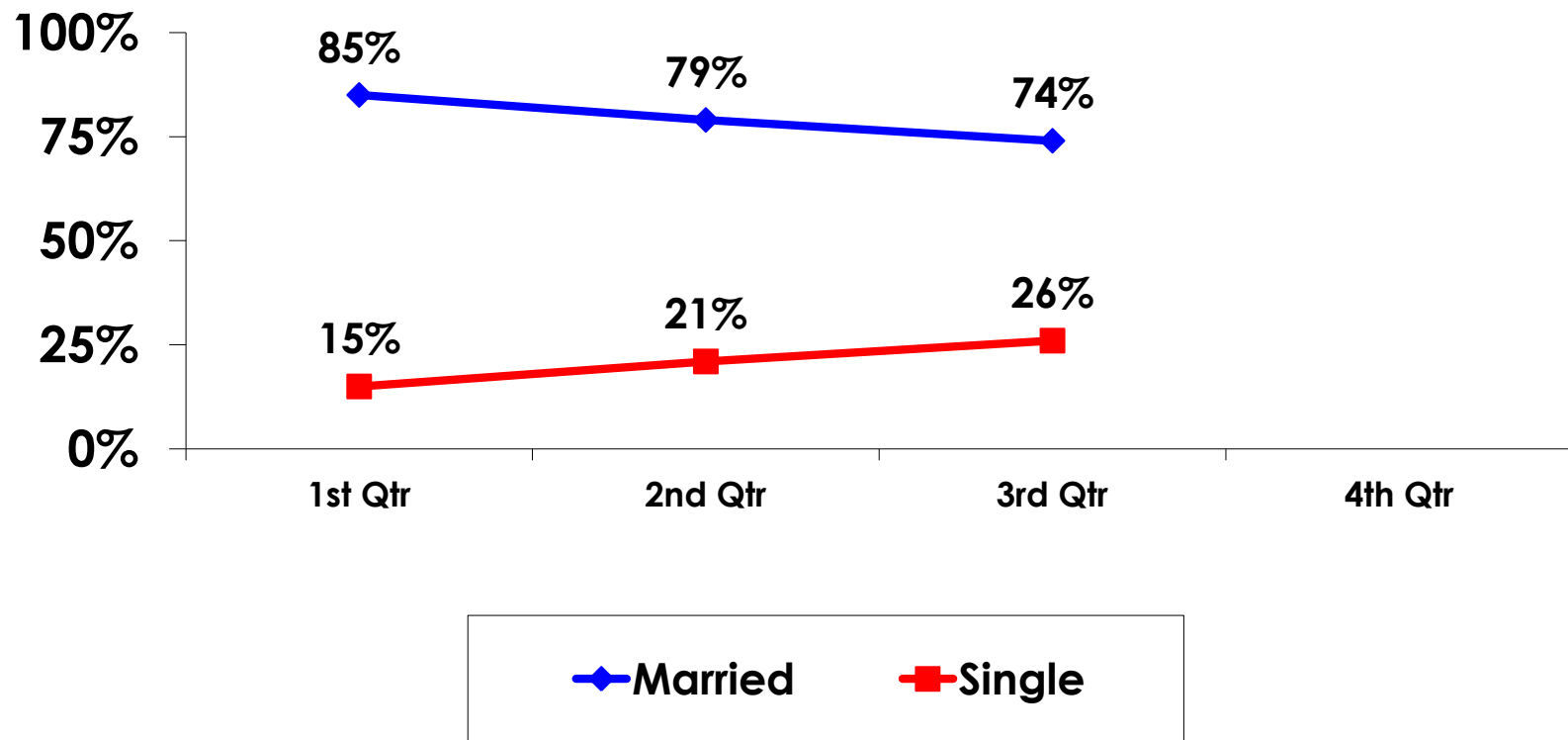
- Families – Q.6
- Adventure traveler – Q.18/19/23
- Wife – Q.E/ Gender
- MICE– Q.5A
- 18-35 – Q.F
- 36-55 – Q.F
- Child – Q.6
- Wedding/ Honeymoon – Q.5A
- Senior – Q.F
- Sports competition – Q.5A

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
Families	68%	71%	65%	
Adventure traveler	66%	68%	59%	
Wives	38%	33%	33%	
MICE	-	-	-	
18-35	26%	33%	35%	
36-55	56%	53%	54%	
Child	21%	19%	21%	
Wedding/ Honeymoon	-	7%	1%	
Seniors (60+)	10%	7%	5%	
Sports Competition	2%	1%	1%	
TOTAL	151	150	150	

SECTION 1 **PROFILE OF RESPONDENTS**

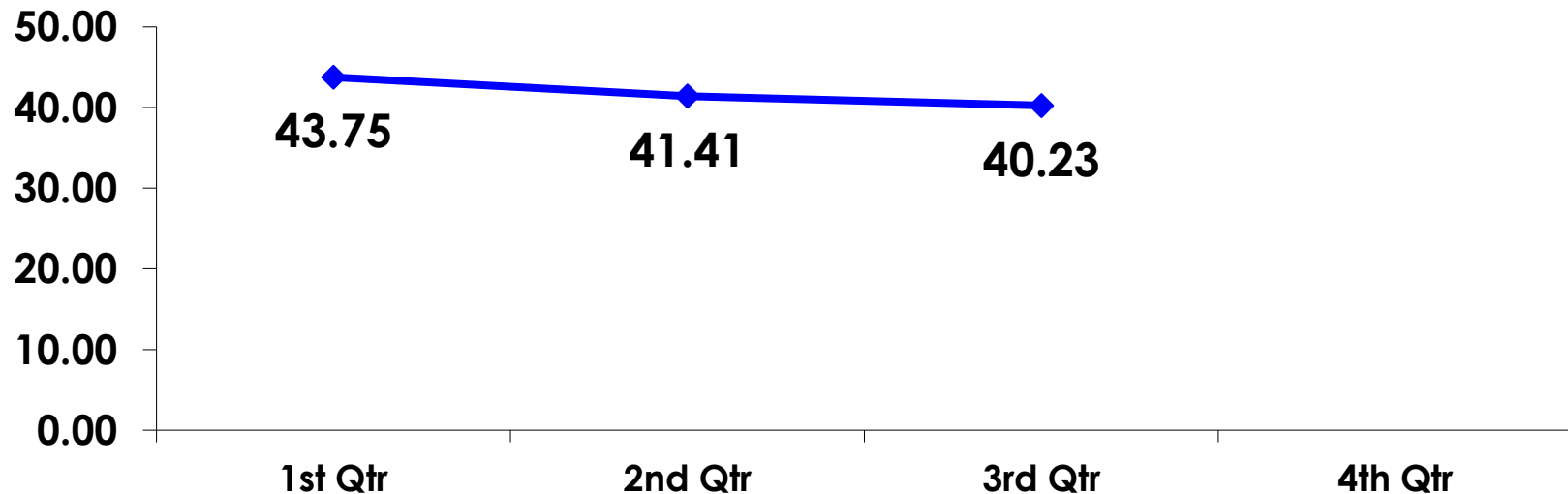
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QE	Married	Count	111	92	67	49		33	71	30	1	2	
		Column N %	74%	94%	76%	100%		63%	88%	97%	100%	29%	
	Single	Count	39	6	21			19	10	1		5	1
		Column N %	26%	6%	24%			37%	12%	3%		71%	100%
	Total	Count	150	98	88	49		52	81	31	1	7	1

AVERAGE AGE - TRACKING



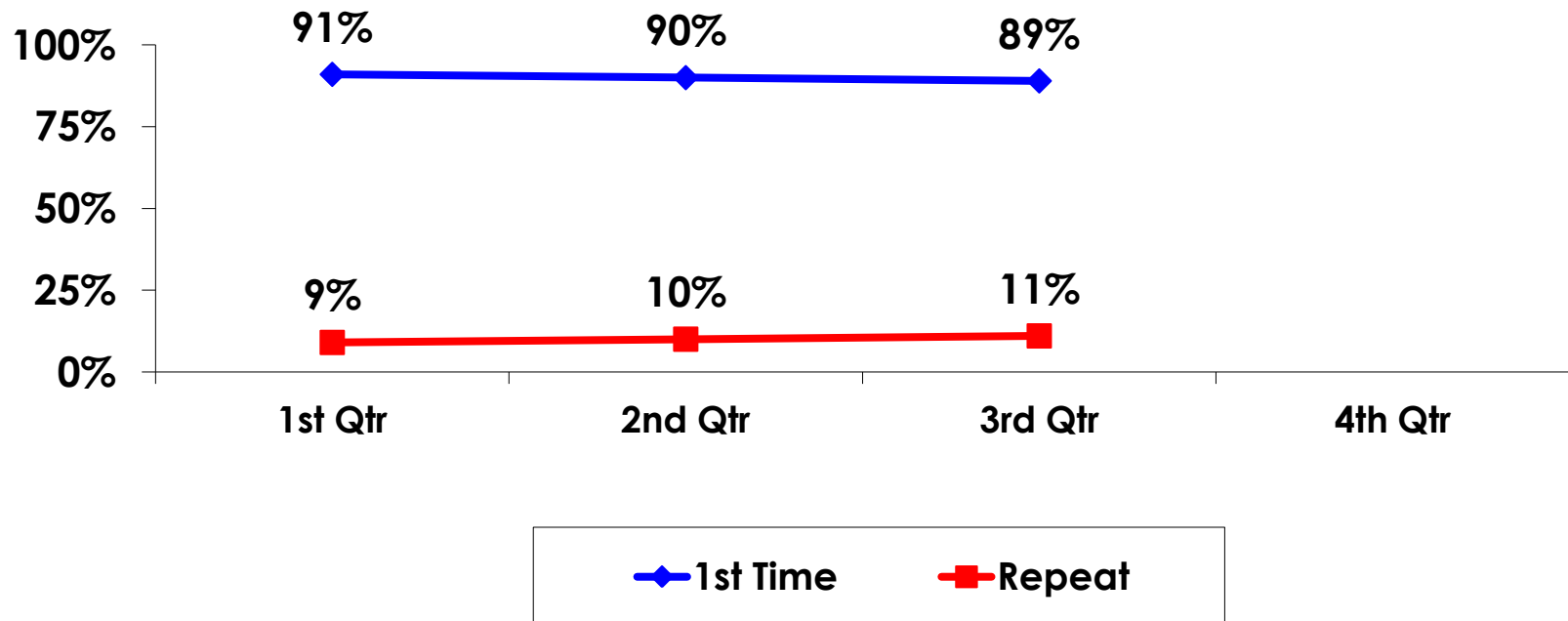
AGE- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	9		5	2		9					
		Column N %	6%		6%	4%		17%					
	25-34	Count	42	26	30	18		42		16			
		Column N %	28%	27%	34%	37%		81%		52%			
	35-49	Count	67	55	40	23		1	66	12	1		1
		Column N %	45%	56%	45%	47%		2%	81%	39%	100%		100%
	50+	Count	32	17	13	6			15	3		7	
		Column N %	21%	17%	15%	12%			19%	10%		100%	
	Total	Count	150	98	88	49		52	81	31	1	7	1
QF	Mean		40.23	41.01	38.15	38.20		28.50	43.77	36.71	46.00	62.00	36.00

INCOME - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q27	<732,321	Count	18	8	9	4		9	7	2		1	
		Column N %	12%	8%	10%	8%		17%	9%	6%		17%	
	732,321-1,098,481	Count	81	50	51	30		33	39	14		2	
		Column N %	55%	52%	59%	61%		63%	49%	45%		33%	
	1,098,482-1,464,642	Count	25	17	12	11		7	15	8		1	
		Column N %	17%	18%	14%	22%		13%	19%	26%		17%	
	1,464,643-1,830,803	Count	8	6	5	1		1	6	2		1	
		Column N %	5%	6%	6%	2%		2%	8%	6%		17%	
	1,830,803-2,263,124	Count	8	8	5	1		1	6	2	1	1	
		Column N %	5%	8%	6%	2%		2%	8%	6%	100%	17%	
	2,563,125-3,661,606	Count	6	5	4	1		1	5	2			1
		Column N %	4%	5%	5%	2%		2%	6%	6%			100%
	3,661,607+	Count	2	2	1	1			2	1			
		Column N %	1%	2%	1%	2%			3%	3%			
Total		Count	148	96	87	49		52	80	31	1	6	1

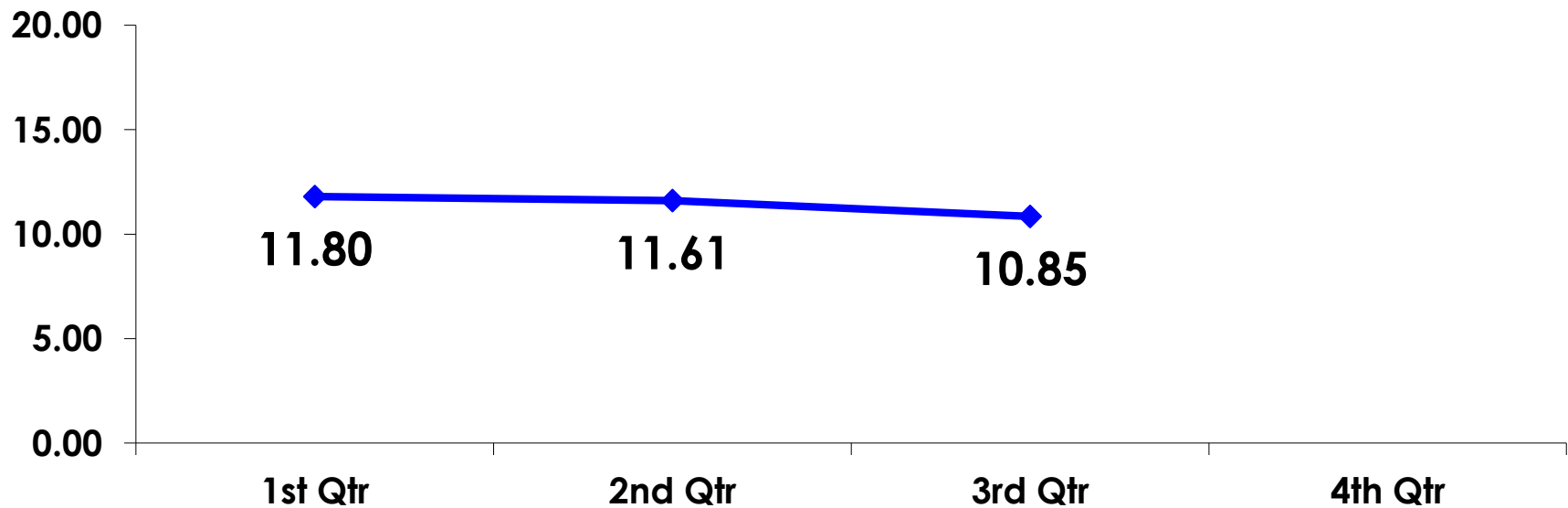
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	134	83	80	45		49	69	26	1	7	1
		Column N %	89%	85%	91%	92%		94%	85%	84%	100%	100%	100%
	No	Count	16	15	8	4		3	12	5			
		Column N %	11%	15%	9%	8%		6%	15%	16%			
	Total	Count	150	98	88	49		52	81	31	1	7	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	3	Count	1						1				
		Column N %	1%						1%				
	4+	Count	148	97	87	49		51	80	30	1	7	1
		Column N %	99%	100%	100%	100%		100%	99%	100%	100%	100%	100%
	Total	Count	149	97	87	49		51	81	30	1	7	1
Q8	Mean		10.85	10.95	10.87	11.82	.	9.63	11.38	10.50	13.00	13.43	14.00
	Median		13	13	13	13	.	9	13	13	13	13	14

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	53	35	21		14	39	17		2	
		Column N %	41%	54%	40%	43%		27%	48%	55%		29%	
	Free-time package tour	Count	79	44	47	24		31	40	14	1	5	1
		Column N %	53%	45%	53%	49%		60%	49%	45%	100%	71%	100%
	Individually arranged travel (FIT)	Count	1					1					
		Column N %	1%					2%					
	Company paid travel	Count	6	1	5	3		5	1				
		Column N %	4%	1%	6%	6%		10%	1%				
	Other	Count	3		1	1		1	1				
		Column N %	2%		1%	2%		2%	1%				
	Total	Count	150	98	88	49		52	81	31	1	7	1

TRAVEL MOTIVATION - SEGMENTATION

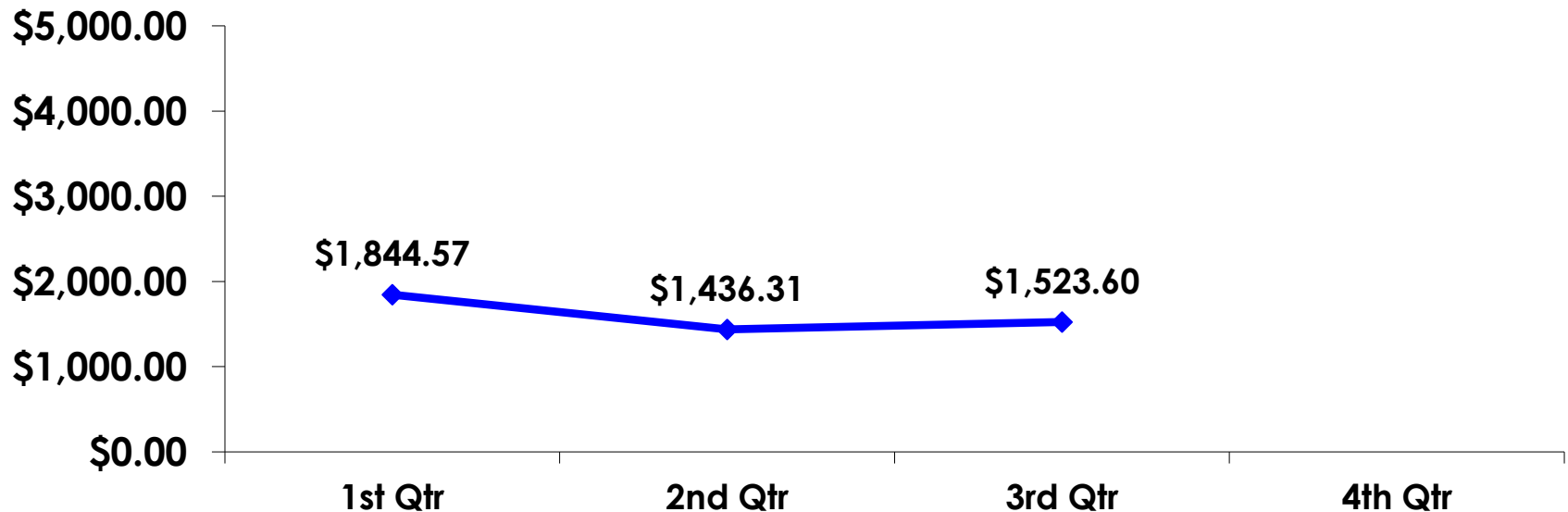
			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q5A	Natural beauty	Count	150	98	88	49		52	81	31	1	7	1
		Column N %	100%	100%	100%	100%		100%	100%	100%	100%	100%	100%
	No Visa required	Count	149	97	88	49		52	80	31	1	7	1
		Column N %	99%	99%	100%	100%		100%	99%	100%	100%	100%	100%
	Short travel time	Count	148	96	87	48		52	79	31	1	7	1
		Column N %	99%	98%	99%	98%		100%	98%	100%	100%	100%	100%
	Relax	Count	123	78	66	36		45	63	26		6	1
		Column N %	82%	80%	75%	73%		87%	78%	84%		86%	100%
	Recomm- friend/family/trvl agnt	Count	94	63	58	28		33	52	16	1	4	1
		Column N %	63%	64%	66%	57%		63%	64%	52%	100%	57%	100%
	Price	Count	64	43	42	13		29	32	13		1	
		Column N %	43%	44%	48%	27%		56%	40%	42%		14%	
	Pleasure	Count	58	38	38	14		16	36	13	1	3	
		Column N %	39%	39%	43%	29%		31%	44%	42%	100%	43%	
	Safe	Count	58	40	35	17		24	28	16		4	
		Column N %	39%	41%	40%	35%		46%	35%	52%		57%	
	Shopping	Count	36	11	22	9		18	13	2		3	1
		Column N %	24%	11%	25%	18%		35%	16%	6%		43%	100%
	Other	Count	17	13	10	9		8	9	7			
		Column N %	11%	13%	11%	18%		15%	11%	23%			
	Previous trip	Count	14	14	7	4		2	11	5			
		Column N %	9%	14%	8%	8%		4%	14%	16%			
	Visit friends/ Relatives	Count	7	5	4	3		2	4	2			
		Column N %	5%	5%	5%	6%		4%	5%	6%			
	Company Sponsored	Count	5	2	5	3		3	2				
		Column N %	3%	2%	6%	6%		6%	2%				
	Company/ Business Trip	Count	5	3	5	3		3	2	1			
		Column N %	3%	3%	6%	6%		6%	2%	3%			
	Water sports	Count	4	3	4	1		3	1				
		Column N %	3%	3%	5%	2%		6%	1%				
	Scuba	Count	4	2	3	1		2	1	1			
		Column N %	3%	2%	3%	2%		4%	1%	3%			
	Organized sports	Count	1		1				1				1
		Column N %	1%		1%				1%				100%
	Married/ Attn wedding	Count	1	1	1				1		1		
		Column N %	1%	1%	1%				1%		100%		
	Total	Count	150	98	88	49		52	81	31	1	7	1

INFORMATION SOURCES - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q1	Friend/ Relative	Count	131	82	73	42		47	68	27	1	7	1
		Column N %	87%	84%	83%	86%		90%	84%	87%	100%	100%	100%
	Internet	Count	116	80	70	40		47	64	27		2	1
		Column N %	77%	82%	80%	82%		90%	79%	87%		29%	100%
	Travel Agent Brochure	Count	55	33	37	22		19	31	7	1	1	1
		Column N %	37%	34%	42%	45%		37%	38%	23%	100%	14%	100%
	TV	Count	47	36	26	16		22	23	13		1	
		Column N %	31%	37%	30%	33%		42%	28%	42%		14%	
	Newspaper	Count	21	17	15	5		9	12	5			
		Column N %	14%	17%	17%	10%		17%	15%	16%			
	GVB Promo	Count	17	5	14	7		9	6	3			
		Column N %	11%	5%	16%	14%		17%	7%	10%			
	Prior Trip	Count	16	15	8	4		3	12	5			
		Column N %	11%	15%	9%	8%		6%	15%	16%			
	Magazine (Consumer)	Count	14	9	11	6		9	5	4			
		Column N %	9%	9%	13%	12%		17%	6%	13%			
	Co-Worker/ Company Trvl Dept	Count	7	3	6	3		4	3				
		Column N %	5%	3%	7%	6%		8%	4%				
	Travel Guidebook- Bookstore	Count	6	1	4	2		4	2				
		Column N %	4%	1%	5%	4%		8%	2%				
	Radio	Count	5	5	4	3		3	2	3			
		Column N %	3%	5%	5%	6%		6%	2%	10%			
	Other	Count	3	2	1	2		2	1	2			
		Column N %	2%	2%	1%	4%		4%	1%	6%			
	Consumer Trvl Show	Count	1		1	1		1					
		Column N %	1%		1%	2%		2%					
	Total	Count	150	98	88	49		52	81	31	1	7	1

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING

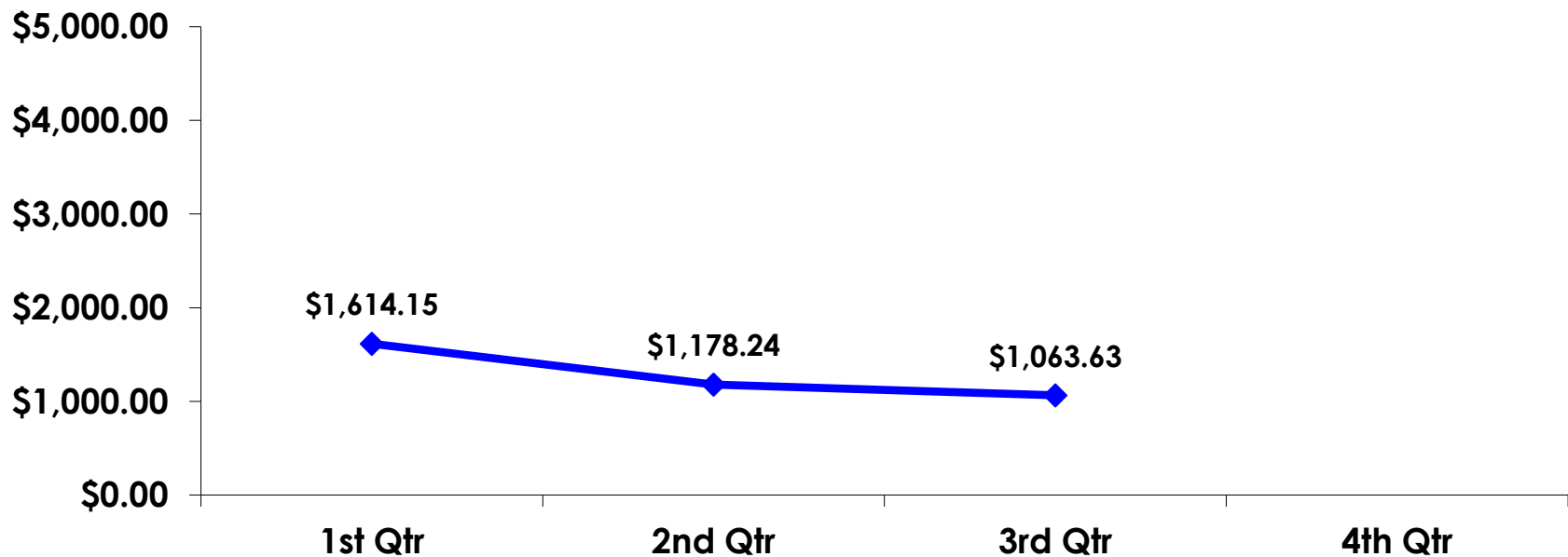


YTD=\$1,602.03

PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
RUB\$	Mean	\$1,523.60	\$1,580.72	\$1,559.11	\$1,300.24	.	\$1,011.72	\$1,780.70	\$1,297.70	\$1,705.51	\$2,075.04	\$1,932.92
	Median	\$1,364	\$1,421	\$1,343	\$1,128	.	\$1,041	\$1,777	\$1,184	\$1,706	\$1,933	\$1,933

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$1,286.07

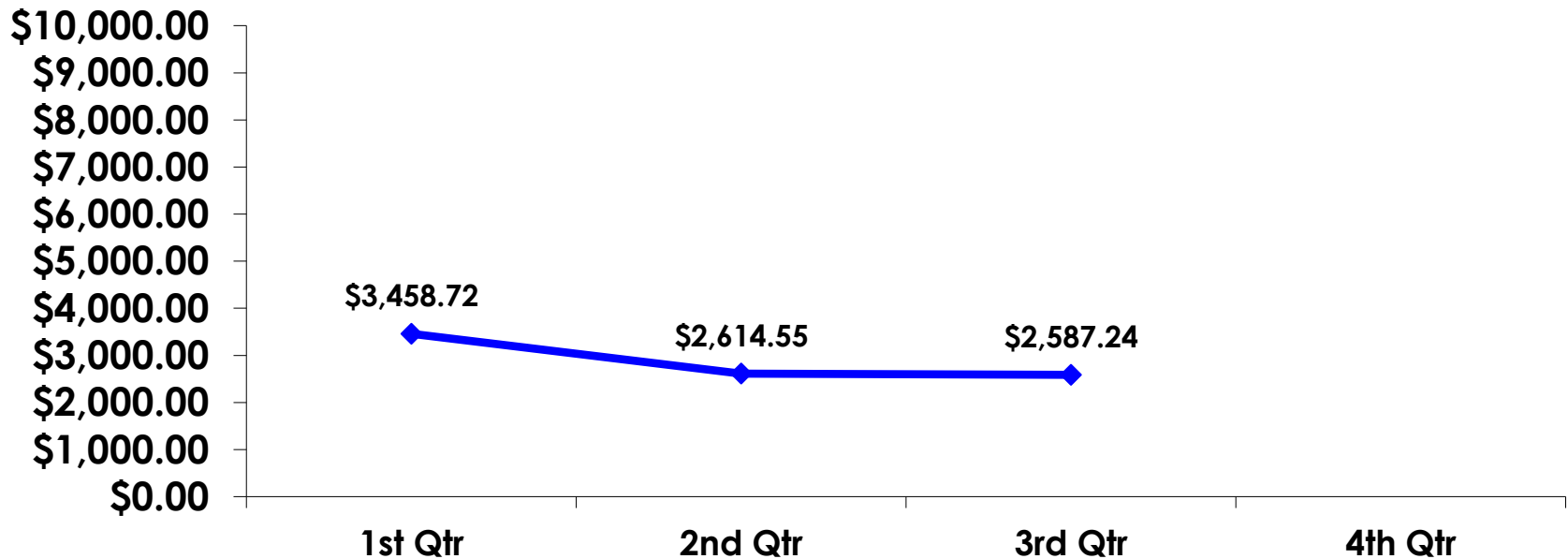
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
ONISLE	Mean	\$1,063.63	\$884.46	\$1,072.66	\$1,021.16	.	\$927.08	\$1,068.42	\$713.06	\$800.00	\$1,856.43	\$3,500.00
	Median	\$948	\$805	\$988	\$950	.	\$923	\$903	\$583	\$800	\$2,150	\$3,500

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$63.93	\$62.65	\$68.64	\$50.00	.	\$60.00	\$71.23	\$61.61	\$300.00	\$0.00	\$300.00
	Median	\$0	\$0	\$0	\$0	.	\$0	\$0	\$0	\$300	\$0	\$300
F&B FF/STORE	Mean	\$71.78	\$63.59	\$81.50	\$77.55	.	\$89.42	\$60.70	\$96.77	\$0.00	\$64.29	\$0.00
	Median	\$26	\$0	\$55	\$50	.	\$100	\$0	\$70	\$0	\$0	\$0
F&B RESTRNT	Mean	\$439.97	\$473.78	\$424.89	\$436.12	.	\$315.96	\$507.65	\$440.65	\$200.00	\$795.71	\$700.00
	Median	\$400	\$450	\$400	\$450	.	\$300	\$500	\$400	\$200	\$750	\$700
OPT TOUR	Mean	\$236.67	\$247.45	\$259.43	\$211.22	.	\$175.96	\$278.40	\$193.23	\$300.00	\$300.00	\$500.00
	Median	\$300	\$300	\$300	\$300	.	\$200	\$300	\$180	\$300	\$350	\$500
GIFT- SELF	Mean	\$543.07	\$539.39	\$617.73	\$592.04	.	\$417.21	\$622.10	\$529.68	\$200.00	\$685.71	\$5,000.00
	Median	\$390	\$360	\$400	\$400	.	\$315	\$400	\$350	\$200	\$500	\$5,000
GIFT- OTHER	Mean	\$288.60	\$320.31	\$294.89	\$294.29	.	\$250.77	\$320.37	\$348.06	\$100.00	\$214.29	\$140.00
	Median	\$250	\$250	\$250	\$250	.	\$260	\$250	\$300	\$100	\$200	\$140
TRANS	Mean	\$55.73	\$76.73	\$62.73	\$50.82	.	\$39.13	\$71.91	\$77.10	\$0.00	\$21.43	\$360.00
	Median	\$0	\$0	\$0	\$0	.	\$0	\$0	\$0	\$0	\$0	\$360
OTHER	Mean	\$52.64	\$66.08	\$51.09	\$33.27	.	\$39.23	\$63.65	\$61.81	\$0.00	\$42.86	\$0.00
	Median	\$0	\$0	\$0	\$0	.	\$0	\$0	\$0	\$0	\$50	\$0
TOTAL	Mean	\$1,774.67	\$1,883.06	\$1,875.23	\$1,789.59	.	\$1,420.38	\$2,016.30	\$1,836.13	\$1,600.00	\$2,124.29	\$7,000.00
	Median	\$1,600	\$1,725	\$1,620	\$1,650	.	\$1,380	\$1,770	\$1,610	\$1,600	\$2,220	\$7,000

TOTAL EXPENDITURES – TRACKING



YTD=\$2,888.10

TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
TOTPP	Mean	\$2,587.24	\$2,465.18	\$2,631.77	\$2,321.40	.	\$1,938.80	\$2,849.12	\$2,010.77	\$2,505.51	\$3,931.47	\$5,432.92
	Median	\$2,434	\$2,347	\$2,451	\$2,202	.	\$1,874	\$2,642	\$1,864	\$2,506	\$4,153	\$5,433

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,3rd Qtr and Overall
1-3 Qtr 2014**

	1st Qtr	2nd Qtr	3rd Qtr	Combin ed 1-3 Qtr 2014
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	3			2
Ease of getting around			1	
Safety walking around at night				
Quality of daytime tours				
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping		1	2	
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	1			1
Quality of landscape in Guam				
Quality of ground handler	2			
Quality/cleanliness of transportation vehicles				
% of Per Person On Island Expenditures Accounted For	77.5%	21.4%	58.1%	50.1%
NOTE: Only significant drivers are included.				

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Russian visitor's experience on Guam is driven by two significant factors in the Third Quarter 2014 Period. By rank order they are:
 - **Ease of getting around, and**
 - **Quality of shopping.**
- With these two factors, the overall r^2 is .581, meaning that **58.1% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, 1st,2nd,3rd Qtrs 2014, and Overall 1-3rd Qtrs 2014				
	1st Qtr	2nd Qtr	3rd Qtr	Combin ed 1-3 Qtr 2014
Drivers:	rank	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			1	
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%	16.4%	9.5%
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 Third Quarter 2014 Period. It is:
 - **Variety of shopping.**
- With this factor, the overall r^2 is .164, meaning that **16.4% of per person on island expenditure is accounted for by this factor.**