GUAM VISITORS BUREAU
Russia Visitor Tracker Exit Profile
FY2014 Market Segmentation
4th Qtr. (JULY~SEPT 2014)

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 **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

	1st QTR	2nd QTR	3rd QTR	4th QTR
Families	68%	71%	65%	83%
Adventure traveler	66%	68%	59%	74%
Wives	38%	33%	33%	43%
MICE	-	-	-	-
18-35	26%	33%	35%	39%
36-55	56%	53%	54%	57%
Child	21%	19%	21%	50%
Wedding/ Honeymoon	-	7%	1%	-
Seniors (60+)	10%	7%	5%	2%
Sports Competition	2%	1%	1%	1%
TOTAL	151	150	150	150

SECTION 1
PROFILE OF RESPONDENTS

MARITAL STATUS - TRACKING
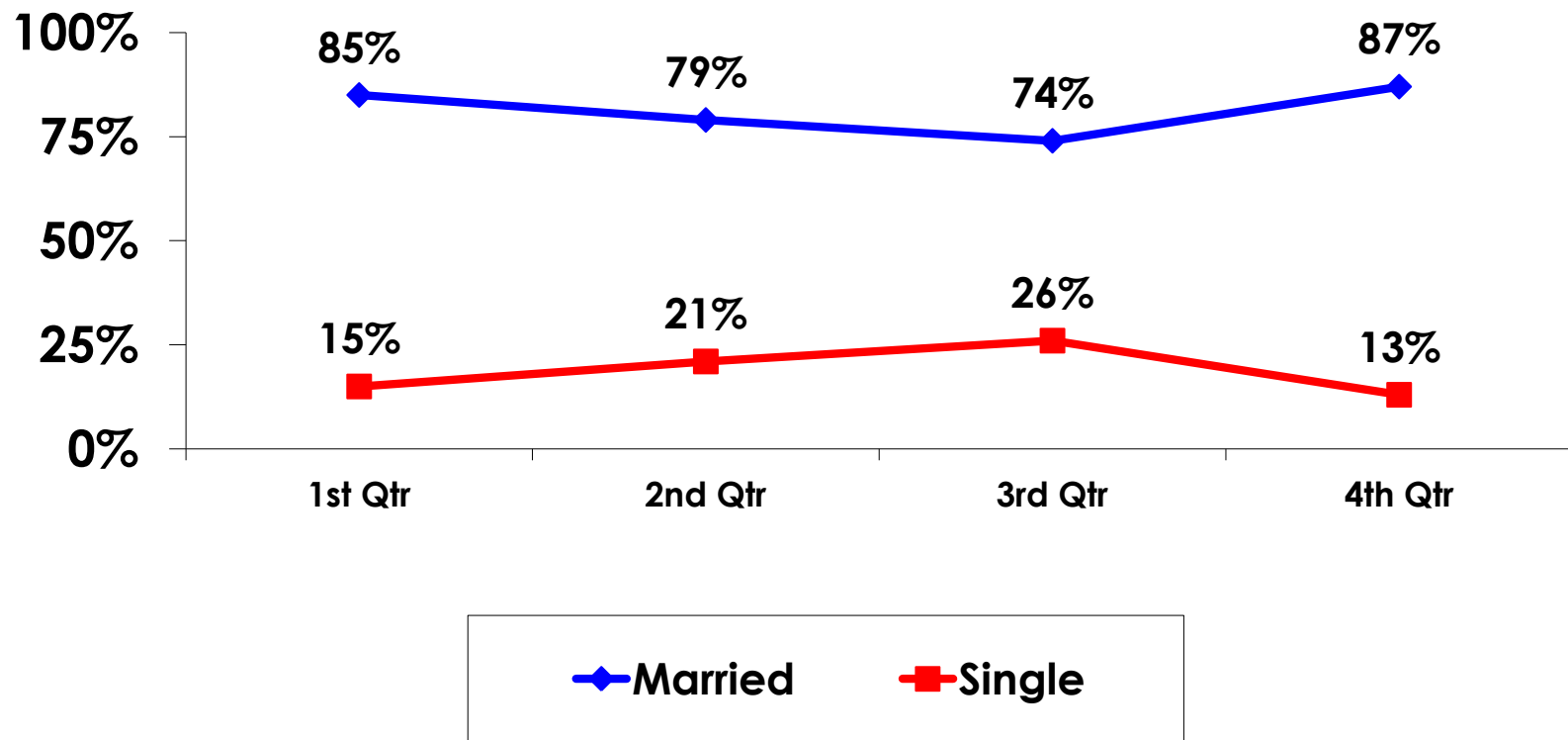
MARITAL STATUS-SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QE	Married	Count	131	116	97	65		48	77	73		3	
		Column N %	87%	94%	87%	100%		83%	91%	97%		100%	
	Single	Count	19	8	14			10	8	2			1
		Column N %	13%	6%	13%			17%	9%	3%			100%
	Total	Count	150	124	111	65		58	85	75		3	1

AVERAGE AGE - TRACKING
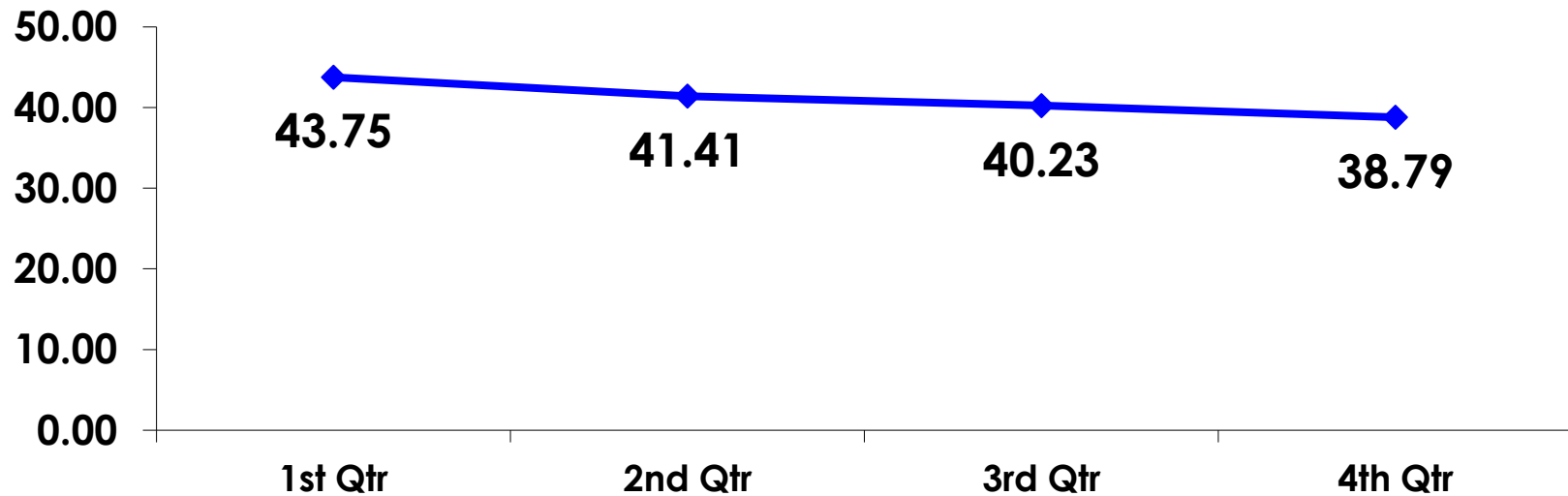
AGE- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	9	1	8			9					
		Column N %	6%	1%	7%			16%					
	25-34	Count	41	36	29	25		41		31			1
		Column N %	27%	29%	26%	38%		71%		41%			100%
	35-49	Count	79	69	62	32		8	71	39			
		Column N %	53%	56%	56%	49%		14%	84%	52%			
	50+	Count	21	18	12	8			14	5		3	
		Column N %	14%	15%	11%	12%			16%	7%		100%	
	Total	Count	150	124	111	65		58	85	75		3	1
QF	Mean		38.79	39.65	38.28	37.95	.	31.02	42.42	36.97	.	63.00	26.00

INCOME - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q27	<732,321	Count	8	4	4	2		4	1	1		1	
		Column N %	6%	3%	4%	3%		7%	1%	1%		33%	
	732,321-1,098,481	Count	48	38	35	21		16	30	22		1	1
		Column N %	34%	32%	34%	34%		30%	37%	31%		33%	100%
	1,098,482-1,464,642	Count	40	37	29	23		15	24	27			
		Column N %	28%	31%	28%	37%		28%	29%	38%			
	1,464,643-1,830,803	Count	20	15	17	5		5	14	11		1	
		Column N %	14%	13%	16%	8%		9%	17%	15%		33%	
	1,830,803-2,263,124	Count	15	15	11	7		7	8	6			
		Column N %	10%	13%	11%	11%		13%	10%	8%			
	2,563,125-3,661,606	Count	7	6	5	4		3	4	2			
		Column N %	5%	5%	5%	6%		6%	5%	3%			
	3,661,607+	Count	3	3	1			2	1	3			
		Column N %	2%	3%	1%			4%	1%	4%			
	No Income	Count	2		2			2					
		Column N %	1%		2%			4%					
	Total	Count	143	118	104	62		54	82	72		3	1

PRIOR TRIPS TO GUAM - TRACKING
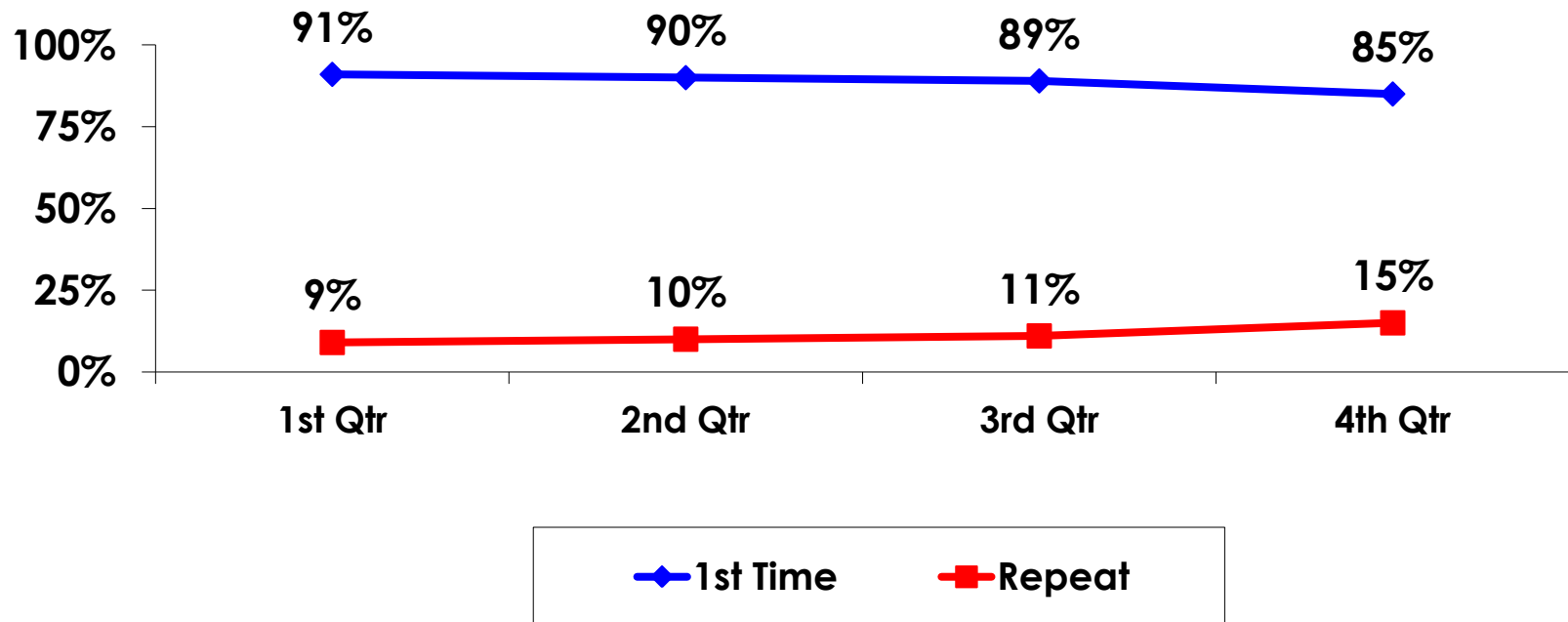
PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	127	104	96	55		50	70	62		3	
		Column N %	85%	84%	86%	85%		86%	82%	83%		100%	
	No	Count	23	20	15	10		8	15	13			1
		Column N %	15%	16%	14%	15%		14%	18%	17%			100%
	Total	Count	150	124	111	65		58	85	75		3	1

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AVG LENGTH OF STAY - TRACKING
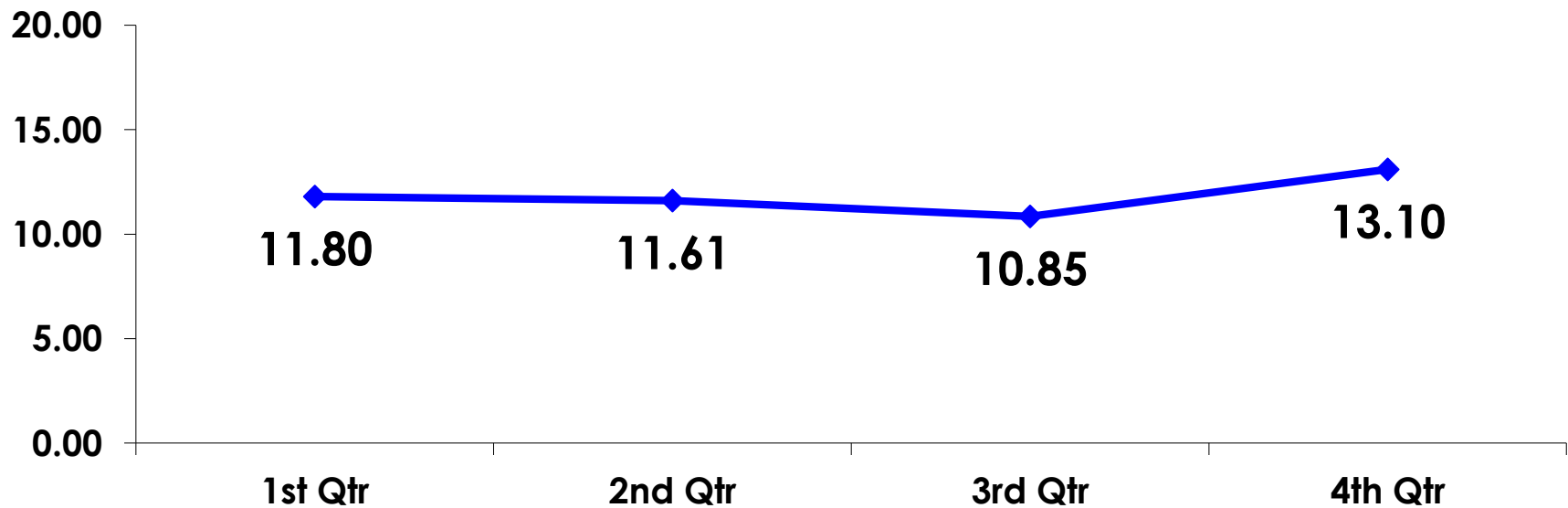
AVG LENGTH OF STAY - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q8	4+	Count	150	124	111	65		58	85	75		3	1
		Column N %	100%	100%	100%	100%		100%	100%	100%		100%	100%
	Total	Count	150	124	111	65		58	85	75		3	1
Q8	Mean		13.10	13.43	12.77	12.89	.	12.71	12.93	13.60	.	26.00	13.00
	Median		13	13	13	13	.	13	13	13	.	14	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	37	37	30	19		19	18	30			
		Column N %	25%	30%	27%	29%		33%	21%	40%			
	Free-time package tour	Count	107	82	78	44		38	65	45		2	
		Column N %	71%	66%	70%	68%		66%	76%	60%		67%	
	Individually arranged travel (FIT)	Count	4	3	3	1		1	2				1
		Column N %	3%	2%	3%	2%		2%	2%				100%
	Other	Count	2	2		1						1	
		Column N %	1%	2%		2%						33%	
	Total	Count	150	124	111	65		58	85	75		3	1

TRAVEL MOTIVATION - SEGMENTATION

Q5A			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q5A	No Visa required	Count	149	123	111	64		58	85	75		3	1
		Column N %	99%	99%	100%	98%		100%	100%	100%		100%	100%
	Natural beauty	Count	146	120	108	62		58	81	71		3	1
		Column N %	97%	97%	97%	95%		100%	95%	95%		100%	100%
	Short travel time	Count	146	121	108	64		56	84	75		2	1
		Column N %	97%	98%	97%	98%		97%	99%	100%		67%	100%
	Relax	Count	117	97	89	49		41	70	59		3	
		Column N %	78%	78%	80%	75%		71%	82%	79%		100%	
	Safe	Count	81	69	60	37		34	45	46		1	
		Column N %	54%	56%	54%	57%		59%	53%	61%		33%	
	Recomm- friend/family/trvl agnt	Count	79	65	60	35		36	42	42			
		Column N %	53%	52%	54%	54%		62%	49%	56%			
	Price	Count	51	40	38	22		22	27	25			1
		Column N %	34%	32%	34%	34%		38%	32%	33%			100%
	Pleasure	Count	38	33	29	13		14	22	16		1	
		Column N %	25%	27%	26%	20%		24%	26%	21%		33%	
	Shopping	Count	31	19	20	17		15	15	10			1
		Column N %	21%	15%	18%	26%		26%	18%	13%			100%
	Previous trip	Count	23	20	15	10		8	15	13			1
		Column N %	15%	16%	14%	15%		14%	18%	17%			100%
	Other	Count	13	12	9	7		6	7	10			
		Column N %	9%	10%	8%	11%		10%	8%	13%			
	Water sports	Count	7	7	5	1		4	3	5			
		Column N %	5%	6%	5%	2%		7%	4%	7%			
	Scuba	Count	4	4	4	2		2	2	1			
		Column N %	3%	3%	4%	3%		3%	2%	1%			
	Visit friends/ Relatives	Count	3	2	3	2			3				
		Column N %	2%	2%	3%	3%			4%				
	Organized sports	Count	1	1	1			1					
		Column N %	1%	1%	1%			2%					100%
	Company Sponsored	Count	1	1	1			1					1
		Column N %	1%	1%	1%			2%					100%
	Total	Count	150	124	111	65		58	85	75		3	1

INFORMATION SOURCES - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q1	Internet	Count	124	105	96	54		48	73	67		1	
		Column N %	83%	85%	86%	83%		83%	86%	89%		33%	
	Friend/ Relative	Count	122	98	90	53		52	63	57		3	
		Column N %	81%	79%	81%	82%		90%	74%	76%		100%	
	Travel Agent Brochure	Count	65	57	52	28		24	41	33			
		Column N %	43%	46%	47%	43%		41%	48%	44%			
	TV	Count	62	54	47	28		22	37	34		1	
		Column N %	41%	44%	42%	43%		38%	44%	45%		33%	
	GVB Promo	Count	28	25	23	14		13	15	17			
		Column N %	19%	20%	21%	22%		22%	18%	23%			
	Magazine (Consumer)	Count	28	24	21	13		11	17	14			
		Column N %	19%	19%	19%	20%		19%	20%	19%			
	Newspaper	Count	23	19	15	10		9	11	14		1	
		Column N %	15%	15%	14%	15%		16%	13%	19%		33%	
	Prior Trip	Count	19	16	14	10		5	14	10			
		Column N %	13%	13%	13%	15%		9%	16%	13%			
	Other	Count	6	2	5	2		5	1	2			
		Column N %	4%	2%	5%	3%		9%	1%	3%			
	Co-Worker/ Company Trvl Dept	Count	6	6	5	3		4	2	4			1
		Column N %	4%	5%	5%	5%		7%	2%	5%			100%
	Radio	Count	4	4	3	1		1	3	1			
		Column N %	3%	3%	3%	2%		2%	4%	1%			
	Travel Trade Show	Count	3	2	3				3				
		Column N %	2%	2%	3%				4%				
	GVB Office	Count	3	2	3	3			3	2			
		Column N %	2%	2%	3%	5%			4%	3%			
	Consumer Trvl Show	Count	1	1	1			1		1			
		Column N %	1%	1%	1%			2%		1%			
	Travel Guidebook- Bookstore	Count	1		1	1				1			
		Column N %	1%		1%	2%				1%			
	Total	Count	150	124	111	65		58	85	75		3	1

SECTION 3
EXPENDITURES
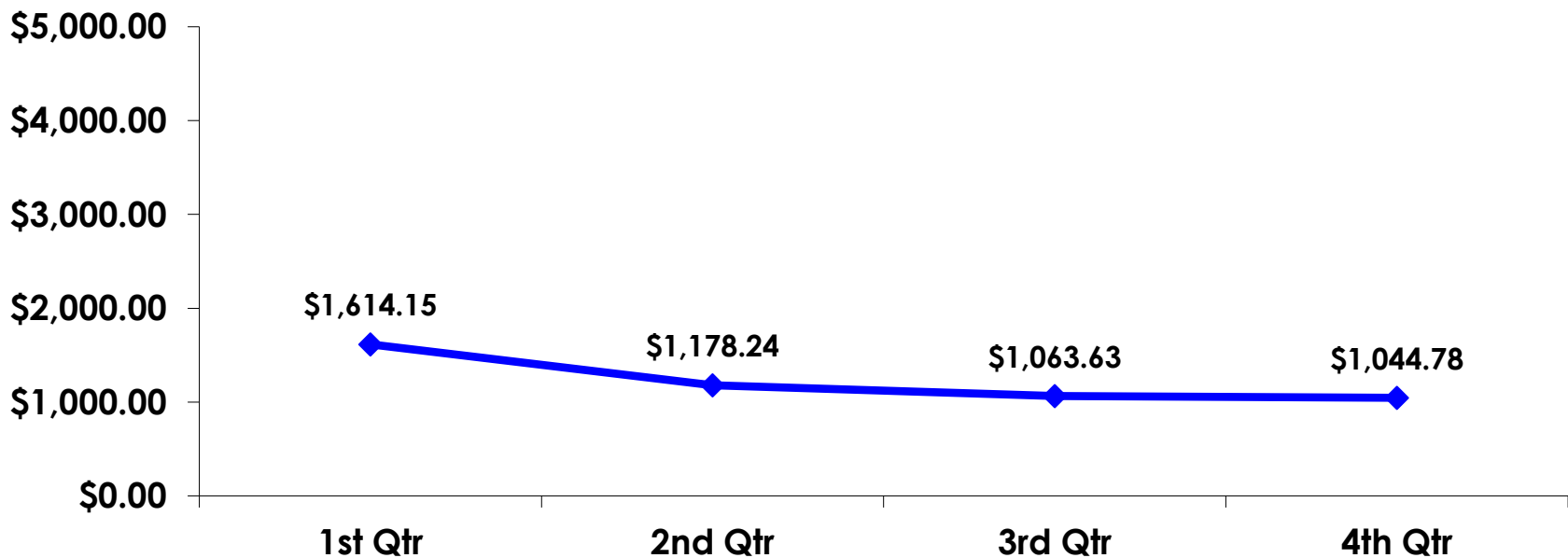
PREPAID EXPENDITURES - TRACKING
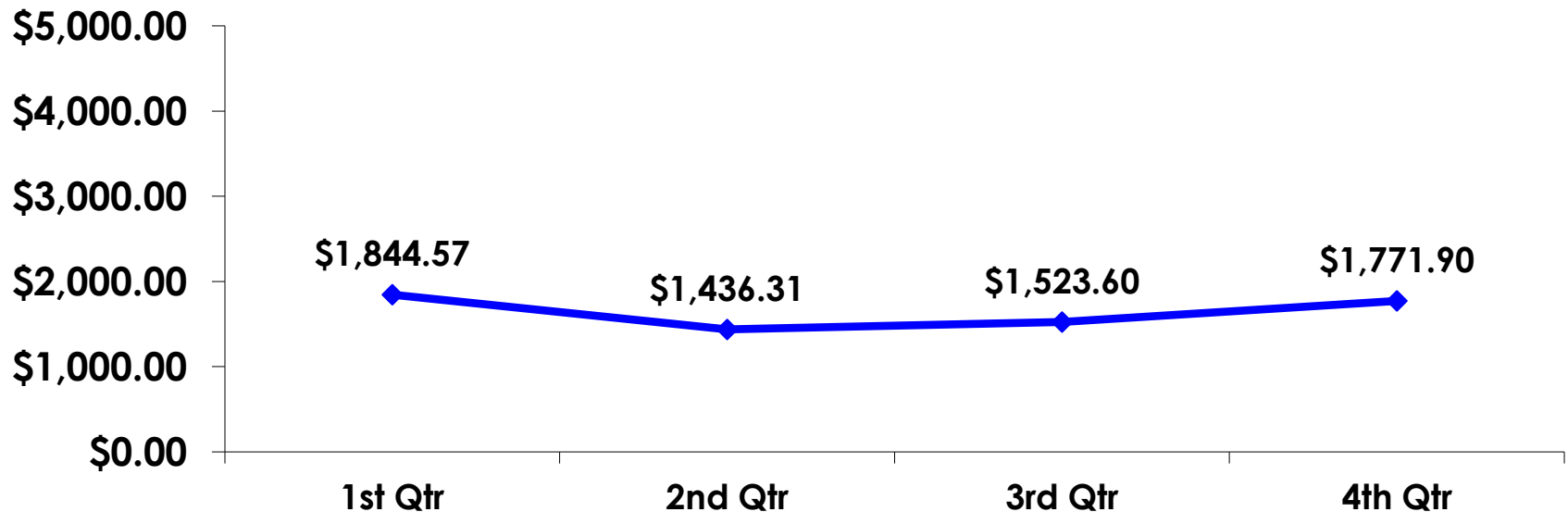
YTD=$1,644.43

PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
RUB$	Mean	$1,771.90	$1,902.96	$1,822.92	$1,779.64	.	$1,659.81	$1,873.25	$1,770.83	.	$662.88	$0.00
	Median	$1,686	$1,776	$1,776	$1,705	.	$1,719	$1,686	$1,752	.	$0	$0

ON-ISLAND EXPENDITURES - TRACKING

Chart showing On-Island Expenditures tracking by quarter:
- 1st Qtr: $1,614.15
- 2nd Qtr: $1,178.24
- 3rd Qtr: $1,063.63
- 4th Qtr: $1,044.78

YTD = $1,225.85

ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
ONISLE	Mean	$1,044.78	$874.82	$999.59	$998.91	.	$1,030.70	$1,058.19	$684.26	.	$930.00	$2,870.00
	Median	$775	$732	$775	$775	.	$763	$750	$593	.	$850	$2,870

ON-ISLAND EXPENSE-BREAKDOWN

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	$114.50	$129.88	$117.66	$91.31	.	$77.33	$136.94	$145.00	.	$100.00	$0.00
	Median	$0	$25	$0	$0	.	$0	$0	$50	.	$100	$0
F&B FF/STORE	Mean	$85.37	$84.76	$86.26	$87.23	.	$83.62	$88.29	$91.53	.	$133.33	$120.00
	Median	$95	$90	$100	$100	.	$100	$90	$100	.	$150	$120
F&B RESTRNT	Mean	$325.03	$339.76	$331.76	$329.92	.	$298.62	$353.35	$334.00	.	$116.67	$300.00
	Median	$350	$350	$350	$350	.	$300	$350	$350	.	$150	$300
OPT TOUR	Mean	$280.03	$290.85	$319.73	$272.31	.	$235.34	$318.18	$287.67	.	$83.33	$300.00
	Median	$300	$300	$330	$300	.	$275	$320	$300	.	$0	$300
GIFT- SELF	Mean	$688.60	$663.87	$669.46	$720.46	.	$606.03	$782.24	$566.33	.	$183.33	$1,200.00
	Median	$350	$350	$350	$400	.	$300	$400	$300	.	$150	$1,200
GIFT- OTHER	Mean	$353.60	$337.42	$333.69	$339.23	.	$342.76	$370.71	$298.67	.	$216.67	$500.00
	Median	$250	$250	$250	$250	.	$250	$250	$200	.	$250	$500
TRANS	Mean	$87.37	$99.64	$90.95	$53.54	.	$74.14	$101.47	$84.53	.	$30.00	$450.00
	Median	$15	$50	$0	$0	.	$0	$50	$0	.	$40	$450
OTHER	Mean	$110.81	$122.83	$127.39	$54.78	.	$79.48	$138.95	$170.28	.	$66.67	$0.00
	Median	$0	$0	$0	$0	.	$0	$0	$0	.	$100	$0
TOTAL	Mean	$2,019.41	$2,037.67	$2,042.66	$1,885.71	.	$1,797.33	$2,245.60	$1,927.28	.	$930.00	$2,870.00
	Median	$1,600	$1,625	$1,600	$1,600	.	$1,600	$1,670	$1,600	.	$850	$2,870

TOTAL EXPENDITURES – TRACKING
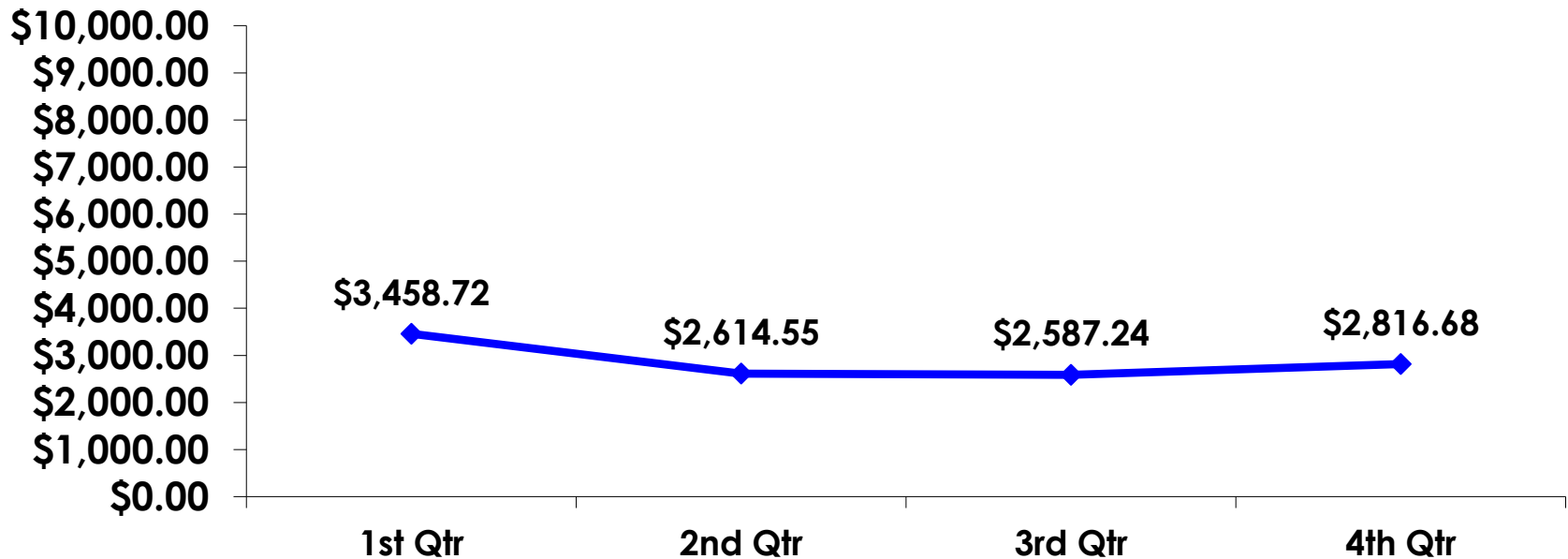
YTD=$2,870.28

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.

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Comparison of Drivers of Overall Satisfaction, 1st,2nd,3rd,4th Qtr and Overall 1-4 Qtr 2014					
Drivers:	1st Qtr rank	2nd Qtr rank	3rd Qtr rank	4th Qtr rank	Combined 1-4 Qtr 2014 rank
Quality & Cleanliness of beaches & parks	3				2
Ease of getting around			1	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	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%	61.8%	51.0%
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 Fourth 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 .618 meaning that **61.8% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, 1st,2nd,3rd,4th Qtrs 2014, and Overall 1-4th Qtrs 2014					
Drivers:	1st Qtr rank	2nd Qtr rank	3rd Qtr rank	**4th Qtr** **rank**	Combined 1-4 Qtr 2014 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	**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%	**19.9%**	10.3%
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 2014 Period. It is:

  – **Variety of shopping.**

- With this factor the overall r^2 is .199 meaning that **19.9% of per person on island expenditure is accounted for by this factor.**