



GUAM VISITORS BUREAU

Russia Visitor Tracker Exit Profile

FY2015 Market Segmentation

2ND QTR. (JAN~MAR 2015)



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

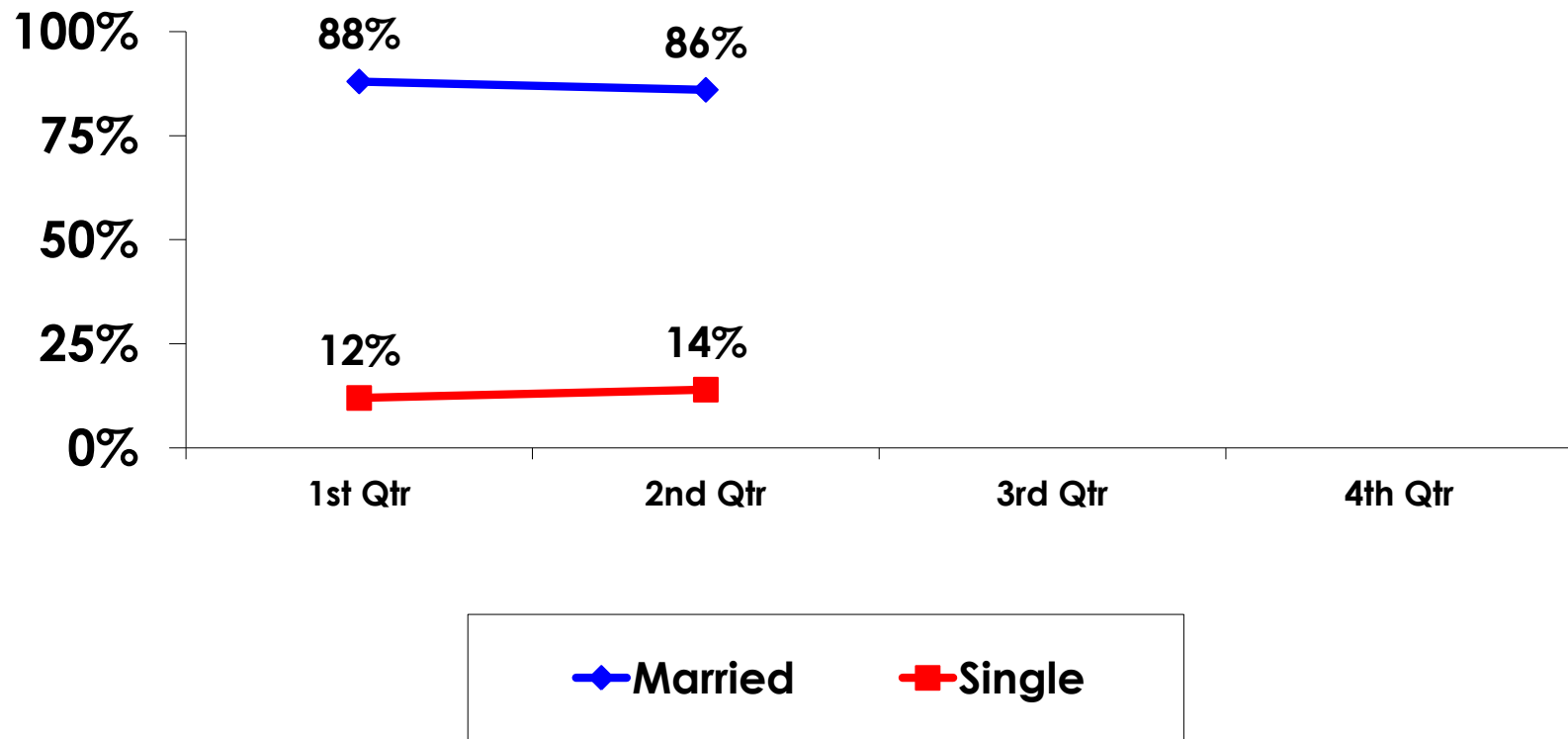
- Families – Q.6
- Adventure traveler – Q.18/19/23
- Wife – Q.E/ Gender
- MICE– Q.5A
- 18-35 – Q.F
- 36-55 – Q.F
- Child – Q.6
- Wedding/ Honeymoon – Q.5A
- Senior – Q.F
- Sports competition – Q.5A

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
Families	73%	75%		
Adventure traveler	67%	51%		
Wives	41%	35%		
MICE	1%	-		
18-35	29%	36%		
36-55	63%	47%		
Child	29%	43%		
Wedding/ Honeymoon	1%	7%		
Seniors (60+)	3%	7%		
Sports Competition	2%	-		
TOTAL	150	150		

SECTION 1 **PROFILE OF RESPONDENTS**

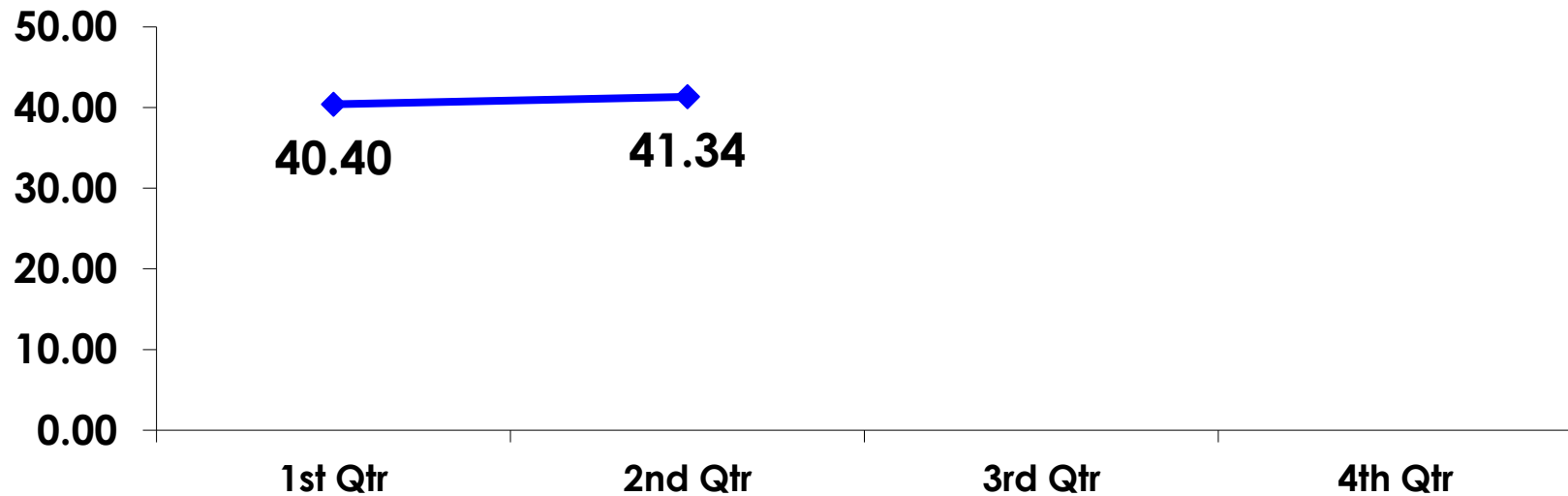
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QE	Married	Count	128	106	68	53		46	64	60	7	9	
		Column N %	86%	95%	88%	100%		88%	90%	94%	64%	82%	
	Single	Count	20	5	9			6	7	4	4	2	
		Column N %	14%	5%	12%			12%	10%	6%	36%	18%	
	Total	Count	148	111	77	53		52	71	64	11	11	

AVERAGE AGE - TRACKING



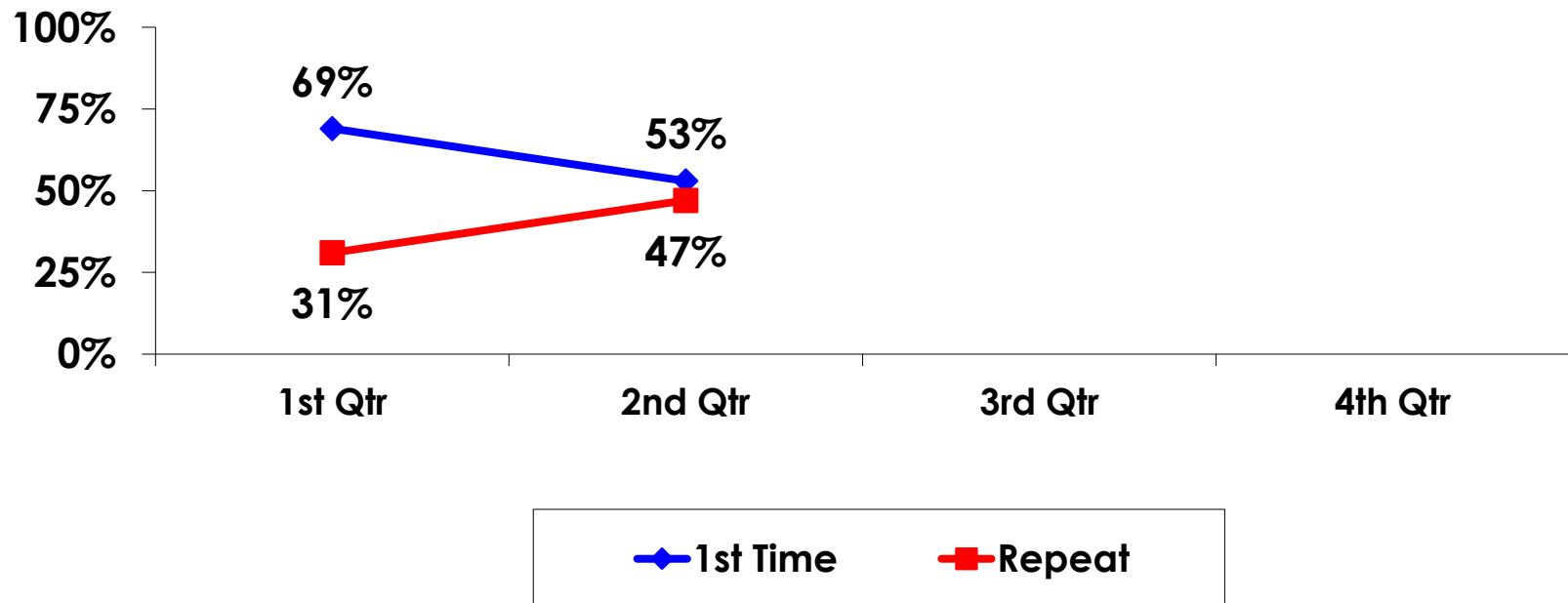
AGE- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QF	25-34	Count	51	40	29	22		51		29	4		
		Column N %	34%	36%	38%	42%		94%		45%	40%		
	35-49	Count	60	45	38	19		3	57	29	1		
		Column N %	41%	41%	49%	36%		6%	80%	45%	10%		
	50+	Count	37	26	10	12			14	7	5	11	
		Column N %	25%	23%	13%	23%			20%	11%	50%	100%	
	Total	Count	148	111	77	53		54	71	65	10	11	
QF	Mean		41.34	40.92	39.01	39.62		31.13	42.92	38.20	42.40	64.36	

INCOME - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q27	<732,321	Count	5	2	1					4		3	
		Column N %	3%	2%	1%					6%		27%	
	732,321-1,098,481	Count	28	15	17	13		13	7	6	1	5	
		Column N %	19%	13%	22%	25%		24%	10%	9%	9%	45%	
	1,098,482-1,464,642	Count	50	40	24	24		21	24	21	3		
		Column N %	33%	36%	31%	45%		39%	34%	32%	27%		
	1,464,643-1,830,803	Count	36	29	22	6		12	20	22	2	2	
		Column N %	24%	26%	29%	11%		22%	28%	34%	18%	18%	
	1,830,803-2,263,124	Count	21	17	11	6		7	13	8	2		
		Column N %	14%	15%	14%	11%		13%	18%	12%	18%		
	2,563,125-3,661,606	Count	8	7	1	4		1	5	3	2	1	
		Column N %	5%	6%	1%	8%		2%	7%	5%	18%	9%	
	3,661,607+	Count	2	2	1				2	1	1		
		Column N %	1%	2%	1%				3%	2%	9%		
Total	Count	150	112	77	53		54	71	65	11	11		

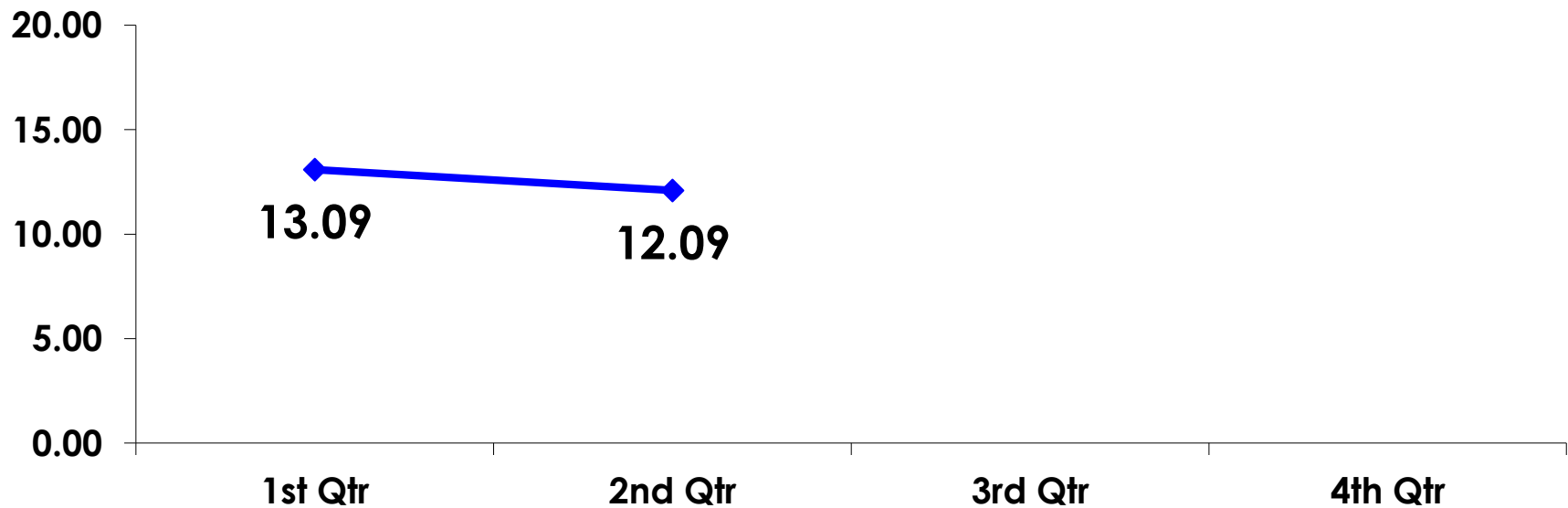
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	79	66	40	25		29	40	31	9	6	
		Column N %	53%	59%	52%	47%		54%	56%	48%	82%	55%	
	No	Count	71	46	37	28		25	31	34	2	5	
		Column N %	47%	41%	48%	53%		46%	44%	52%	18%	45%	
	Total	Count	150	112	77	53		54	71	65	11	11	

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			
		Column N %	1%	1%				2%		2%			
	3	Count	14	2	11	2		3	11				
		Column N %	9%	2%	14%	4%		6%	15%				
	4+	Count	135	109	66	51		50	60	64	11	11	
		Column N %	90%	97%	86%	96%		93%	85%	98%	100%	100%	
	Total	Count	150	112	77	53		54	71	65	11	11	
Q8	Mean		12.09	12.96	10.96	13.45	.	11.65	11.10	13.98	7.18	15.27	.
	Median		13	14	11	14	.	11	13	14	6	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	38	32	17	13		10	20	17	3	2	
		Column N %	26%	29%	22%	25%		19%	29%	27%	30%	18%	
	Free-time package tour	Count	38	32	24	12		16	19	18		1	
		Column N %	26%	29%	32%	23%		30%	27%	28%		9%	
	Individually arranged travel (FIT)	Count	60	44	28	24		25	27	27	7	4	
		Column N %	41%	40%	37%	46%		47%	39%	42%	70%	36%	
	Group tour	Count	6		5	1		2	4				
		Column N %	4%		7%	2%		4%	6%				
	Other	Count	6	3	2	2				2		4	
		Column N %	4%	3%	3%	4%				3%		36%	
	Total	Count	148	111	76	52		53	70	64	10	11	

TRAVEL MOTIVATION - SEGMENTATION

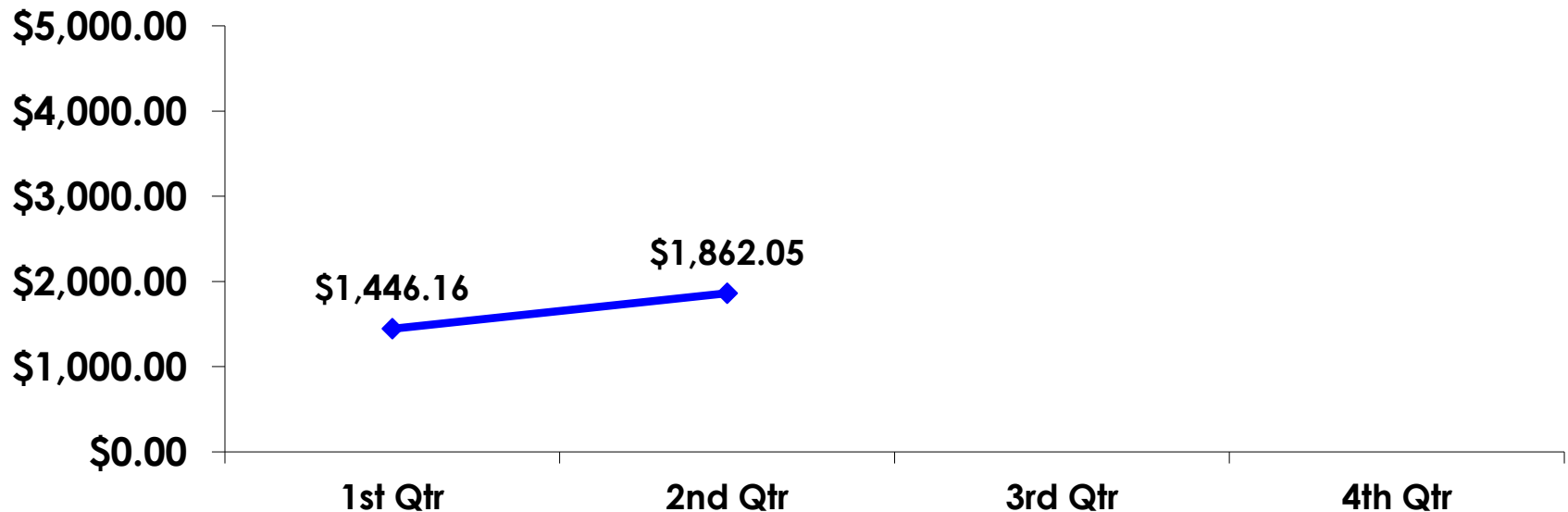
			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q5A	Natural beauty	Count	150	112	77	53		54	71	65	11	11	
		Column N %	100%	100%	100%	100%		100%	100%	100%	100%	100%	100%
	No Visa required	Count	145	108	75	52		54	67	64	11	10	
		Column N %	97%	96%	97%	98%		100%	94%	98%	100%	91%	
	Short travel time	Count	129	105	63	51		49	56	61	9	10	
		Column N %	86%	94%	82%	96%		91%	79%	94%	82%	91%	
	Relax	Count	115	93	52	43		42	50	53	7	10	
		Column N %	77%	83%	68%	81%		78%	70%	82%	64%	91%	
	Safe	Count	102	80	53	38		38	47	45	10	7	
		Column N %	68%	71%	69%	72%		70%	66%	69%	91%	64%	
	Previous trip	Count	67	43	35	26		22	30	32	1	5	
		Column N %	45%	38%	45%	49%		41%	42%	49%	9%	45%	
	Recomm- friend/family/trvl agnt	Count	56	45	31	14		21	27	20	7	4	
		Column N %	37%	40%	40%	26%		39%	38%	31%	64%	36%	
	Pleasure	Count	33	30	23	11		14	16	17	3	2	
		Column N %	22%	27%	30%	21%		26%	23%	26%	27%	18%	
	Other	Count	25	23	9	14		14	7	18	2	2	
		Column N %	17%	21%	12%	26%		26%	10%	28%	18%	18%	
	Scuba	Count	19	7	16	3		5	14	4			
		Column N %	13%	6%	21%	6%		9%	20%	6%			
	Water sports	Count	18	6	16	2		4	14	4	1		
		Column N %	12%	5%	21%	4%		7%	20%	6%	9%		
	Married/ Attn wedding	Count	11	7	4	2		4	5		11		
		Column N %	7%	6%	5%	4%		7%	7%		100%		
	Shopping	Count	10	7	6	3		3	4	6		1	
		Column N %	7%	6%	8%	6%		6%	6%	9%		9%	
	Visit friends/ Relatives	Count	9	6	4	5		3	5	4			
		Column N %	6%	5%	5%	9%		6%	7%	6%			
	Price	Count	2	2	1	1		1	1	2			
		Column N %	1%	2%	1%	2%		2%	1%	3%			
	Company/ Business Trip	Count	1	1		1			1	1			
		Column N %	1%	1%		2%			1%	2%			
	Total	Count	150	112	77	53		54	71	65	11	11	

INFORMATION SOURCES - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q1	Friend/ Relative	Count	124	91	61	42		44	60	49	11	8	
		Column N %	83%	81%	79%	79%		81%	85%	75%	100%	73%	
	Internet	Count	124	92	67	43		48	61	50	10	6	
		Column N %	83%	82%	87%	81%		89%	86%	77%	91%	55%	
	Prior Trip	Count	68	43	36	26		24	30	32	2	4	
		Column N %	45%	38%	47%	49%		44%	42%	49%	18%	36%	
	TV	Count	42	34	27	13		14	25	17	6	2	
		Column N %	28%	30%	35%	25%		26%	35%	26%	55%	18%	
	Travel Agent Brochure	Count	14	13	12	6		6	6	7	3	1	
		Column N %	9%	12%	16%	11%		11%	8%	11%	27%	9%	
	Magazine (Consumer)	Count	14	12	11	6		4	8	7	2	2	
		Column N %	9%	11%	14%	11%		7%	11%	11%	18%	18%	
	Co-Worker/ Company Trvl Dept	Count	5	5	3	3		1	4	2			
		Column N %	3%	4%	4%	6%		2%	6%	3%			
	Other	Count	4	2		2		1	1	1	1		
		Column N %	3%	2%		4%		2%	1%	2%	9%		
	Newspaper	Count	4	4	4	1		2	2	2	1		
		Column N %	3%	4%	5%	2%		4%	3%	3%	9%		
	Radio	Count	3	3	3				3	2			
		Column N %	2%	3%	4%				4%	3%			
	Total	Count	150	112	77	53		54	71	65	11	11	

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$1,654.10

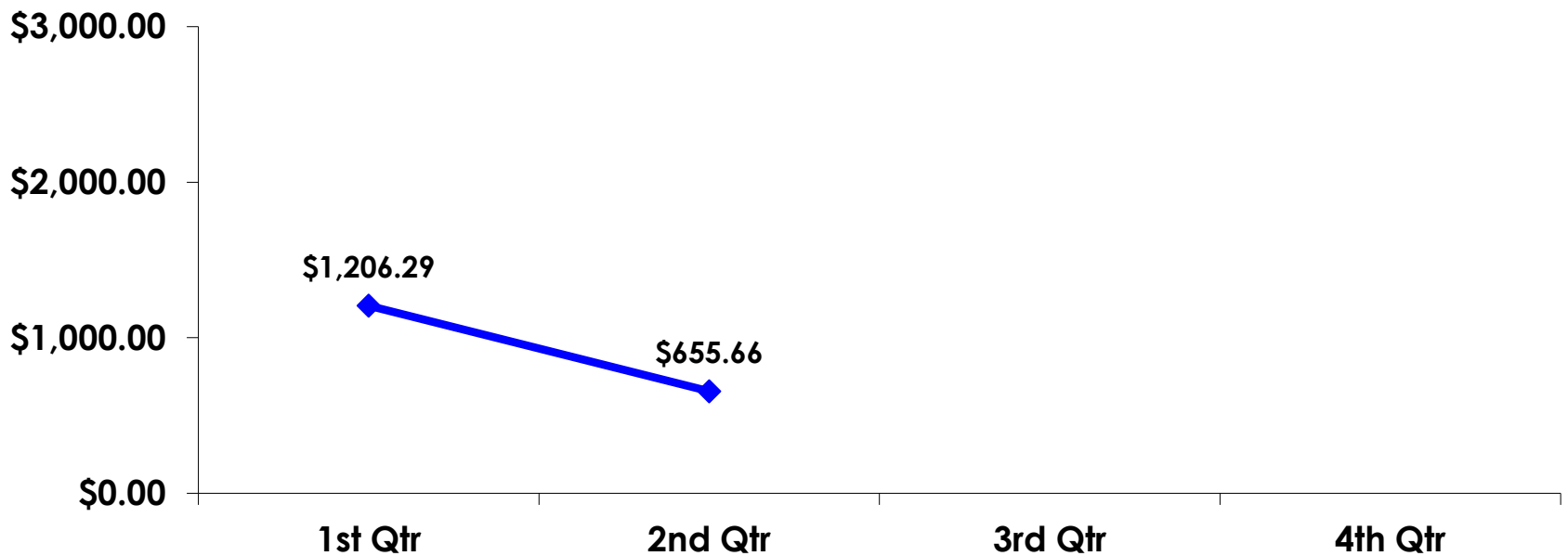
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
RUB\$	Mean	\$1,862.05	\$1,904.81	\$1,897.57	\$1,780.52	.	\$1,875.61	\$2,024.81	\$1,638.89	\$3,164.45	\$956.44	.
	Median	\$1,965	\$1,874	\$1,996	\$1,853	.	\$1,863	\$2,104	\$1,588	\$3,057	\$0	.

PREPAID EXPENSE- BREAKDOWN

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
AIR/ HOTEL	Mean	\$3,603.54	\$4,033.67	\$3,406.67	\$3,624.95	.	\$3,419.38	\$3,737.32	\$4,150.12	\$3,334.92	.	.
	Median	\$3,334.92	\$3,938.38	\$3,303.16	\$3,176.12	.	\$3,144.35	\$3,620.77	\$3,747.82	\$3,334.92	.	.
AIR/ HOTEL/ MEAL	Mean	\$5,386.05	\$5,668.69	\$5,756.49	\$5,380.87	.	\$5,476.53	\$5,413.52	\$6,100.71	\$5,406.17	\$5,260.44	.
AIR	Mean	\$1,790.98	\$1,905.67	\$1,837.61	\$1,720.40	.	\$2,143.88	\$1,690.15	\$1,667.46	.	.	.
	Median	\$1,905.67	\$2,064.48	\$1,905.67	\$1,905.67	.	\$2,143.88	\$1,905.67	\$1,667.46	.	.	.
HOTEL	Mean	\$391.34	\$1,270.45	\$430.10	\$210.42	.	\$262.03	\$412.90	\$1,270.45	.	.	.
	Median	\$262.03	\$1,270.45	\$262.03	\$210.42	.	\$262.03	\$262.03	\$1,270.45	.	.	.
HOTEL/ MEAL	Mean	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.
F&B HOTEL	Mean	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.
TRANS RUSSIA	Mean	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.
TRANS GUAM	Mean	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.
OPT TOUR	Mean	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.
OTHER	Mean	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.
TOTAL	Mean	\$3,957.90	\$4,604.99	\$4,130.70	\$3,868.42	.	\$4,317.02	\$4,211.67	\$4,794.35	\$5,029.58	\$1,912.89	.
	Median	\$3,970.14	\$4,764.17	\$3,938.38	\$3,970.14	.	\$4,248.05	\$3,890.74	\$4,525.96	\$4,764.17	\$0.00	.

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$930.97

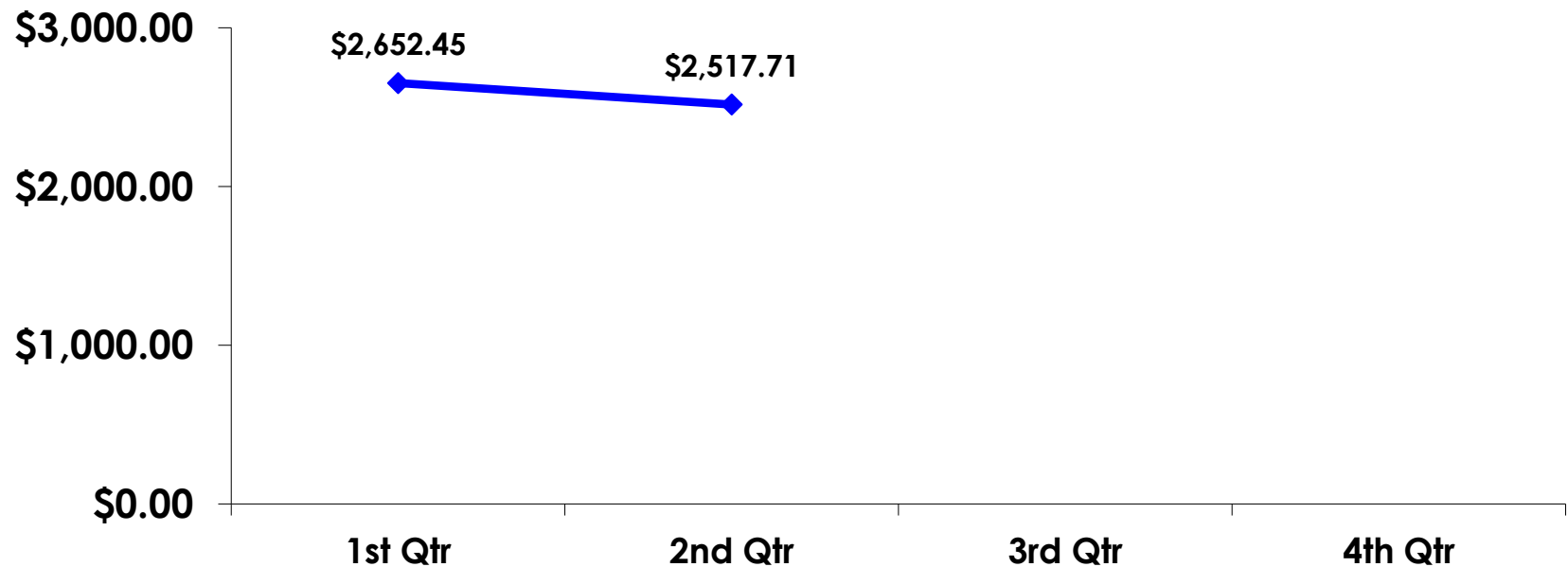
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
ONISLE	Mean	\$655.66	\$578.04	\$692.24	\$626.90	.	\$651.77	\$644.80	\$465.58	\$991.09	\$624.12	.
	Median	\$587	\$500	\$633	\$550	.	\$560	\$625	\$457	\$1,035	\$400	.

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$61.60	\$77.14	\$64.61	\$55.66	.	\$54.91	\$69.08	\$87.00	\$0.00	\$59.09	.
F&B FF/STORE	Mean	\$118.57	\$132.81	\$112.79	\$118.49	.	\$130.19	\$104.44	\$149.77	\$48.18	\$162.73	.
F&B RESTRNT	Mean	\$242.13	\$258.44	\$255.91	\$217.83	.	\$205.37	\$271.83	\$251.15	\$260.91	\$280.91	.
OPT TOUR	Mean	\$194.19	\$186.59	\$229.42	\$159.72	.	\$190.28	\$226.52	\$166.00	\$302.09	\$99.09	.
GIFT- SELF	Mean	\$252.45	\$260.79	\$285.58	\$236.60	.	\$287.22	\$225.04	\$209.69	\$428.00	\$372.73	.
GIFT- OTHER	Mean	\$202.23	\$217.63	\$197.86	\$194.53	.	\$191.57	\$214.79	\$185.92	\$481.82	\$245.45	.
TRANS	Mean	\$129.88	\$155.39	\$137.70	\$95.17	.	\$129.07	\$134.13	\$151.89	\$117.55	\$115.82	.
OTHER	Mean	\$38.61	\$41.79	\$28.60	\$49.66	.	\$41.15	\$31.11	\$48.98	\$40.00	\$33.64	.
TOTAL	Mean	\$1,238.06	\$1,328.45	\$1,315.84	\$1,127.85	.	\$1,228.83	\$1,281.31	\$1,249.65	\$1,678.55	\$1,324.00	.

TOTAL EXPENDITURES – TRACKING



YTD=\$2,585.08

TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
TOTPP	Mean	\$2,517.71	\$2,482.86	\$2,589.81	\$2,407.42	.	\$2,527.38	\$2,669.61	\$2,104.47	\$4,155.54	\$1,580.57	.
	Median	\$2,560	\$2,365	\$2,695	\$2,338	.	\$2,474	\$2,798	\$2,032	\$4,059	\$900	.

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 2015			
	1st Qtr	2nd Qtr	Combined 1-2
Drivers:	rank	rank	Qtr 2015 rank
Quality & Cleanliness of beaches & parks			
Ease of getting around	1		1
Safety walking around at night		2	
Quality of daytime tours			
Variety of daytime tours			
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		1	3
Quality of landscape in Tumon			
Quality of landscape in Guam	2		
Quality of ground handler			2
Quality/cleanliness of transportation vehicles			
% of Per Person On Island Expenditures Accounted For	38.8%	44.9%	38.3%
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 Second Quarter 2015 Period. By rank order they are:
 - **Quality/cleanliness of parks, and**
 - **Safety walking around at night.**
- With these factors, the overall r^2 is .449 meaning that **44.9% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On Isle Expenditure, 1st,2nd Qtr and Overall 1-2 Qtr 2015			
	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			
Quality of shopping	1		
Variety of shopping			1
Price of things on Guam			
Quality of hotel accommodations			
Quality/cleanliness of air, sky			
Quality/cleanliness of parks			
Quality of landscape in Tumon			
Quality of landscape in Guam			
Quality of ground handler			
Quality/cleanliness of transportation vehicles			
% of Per Person On Island Expenditures Accounted For	20.4%	0.0%	19.1%
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 factor in the Second Quarter 2015 Period