



GUAM VISITORS BUREAU

Russia Visitor Tracker Exit Profile

FY2016 Market Segmentation

2ND QTR. (JAN~MAR 2016)



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

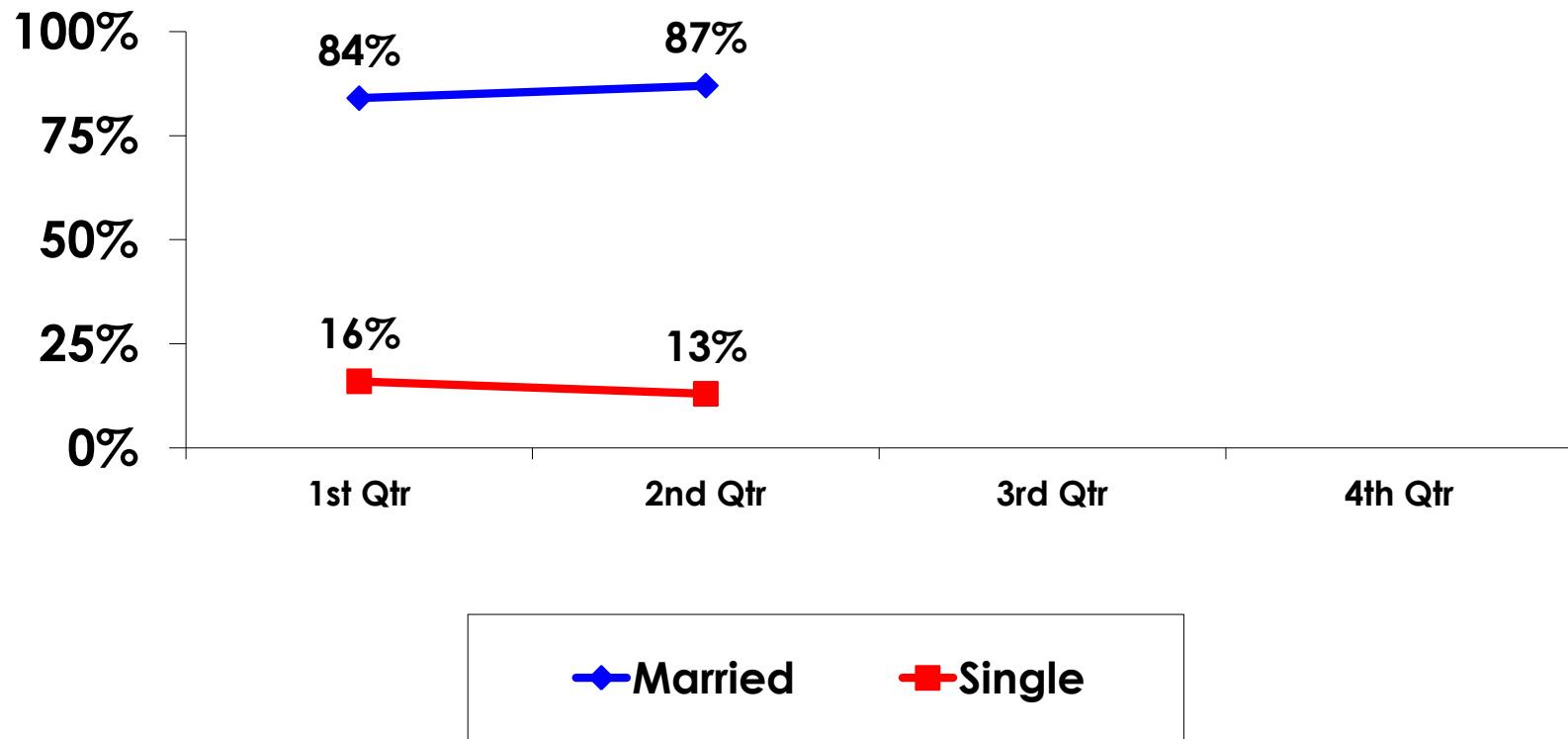
- Families – Q.6
- Adventure traveler – Q.18/19/23
- Wife – Q.E/ Gender
- MICE– Q.5A
- 18-35 – Q.F
- 36-55 – Q.F
- Child – Q.6
- Wedding/ Honeymoon – Q.5A
- Senior – Q.F
- Sports competition – Q.5A

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
Families	49%	85%		
Adventure traveler	23%	24%		
Wives	39%	39%		
MICE	18%	-%		
18-35	24%	38%		
36-55	63%	52%		
Child	17%	56%		
Wedding/ Honeymoon	-%	-%		
Seniors (60+)	7%	3%		
Sports Competition	1%	1%		
TOTAL	150	151		

SECTION 1 **PROFILE OF RESPONDENTS**

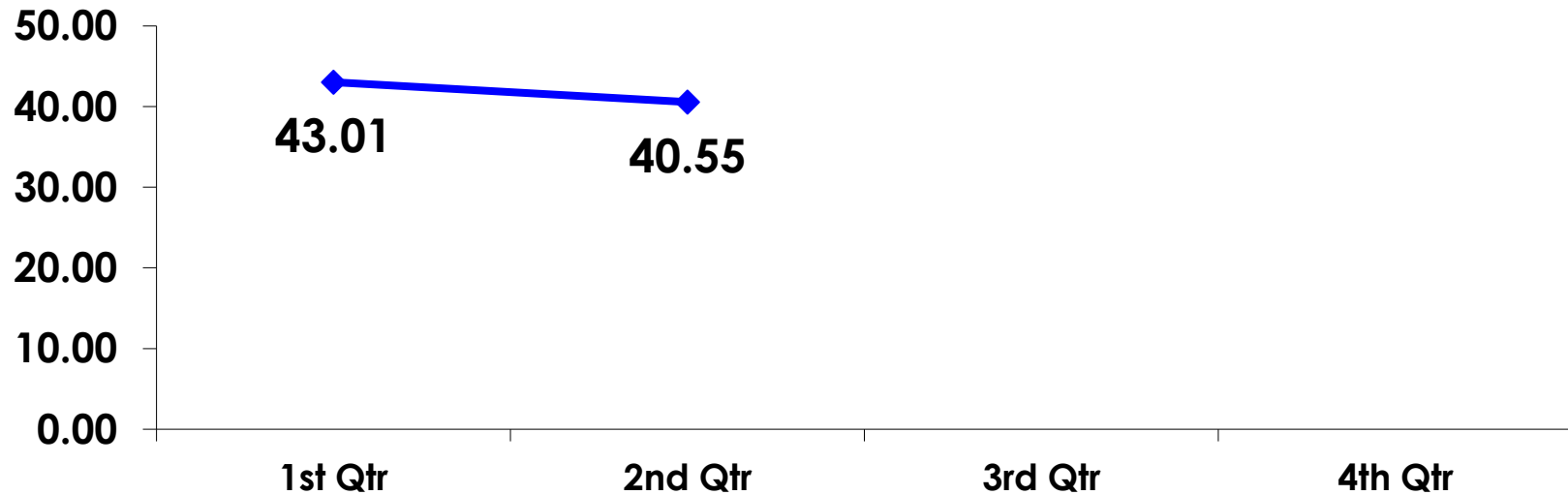
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QE	Married	Count	130	124	35	59		46	71	82		4	
		Column N %	87%	96%	97%	100%		79%	91%	96%		80%	
	Single	Count	20	5	1			12	7	3		1	1
		Column N %	13%	4%	3%			21%	9%	4%		20%	100%
	Total	Count	150	129	36	59		58	78	85		5	1

AVERAGE AGE - TRACKING



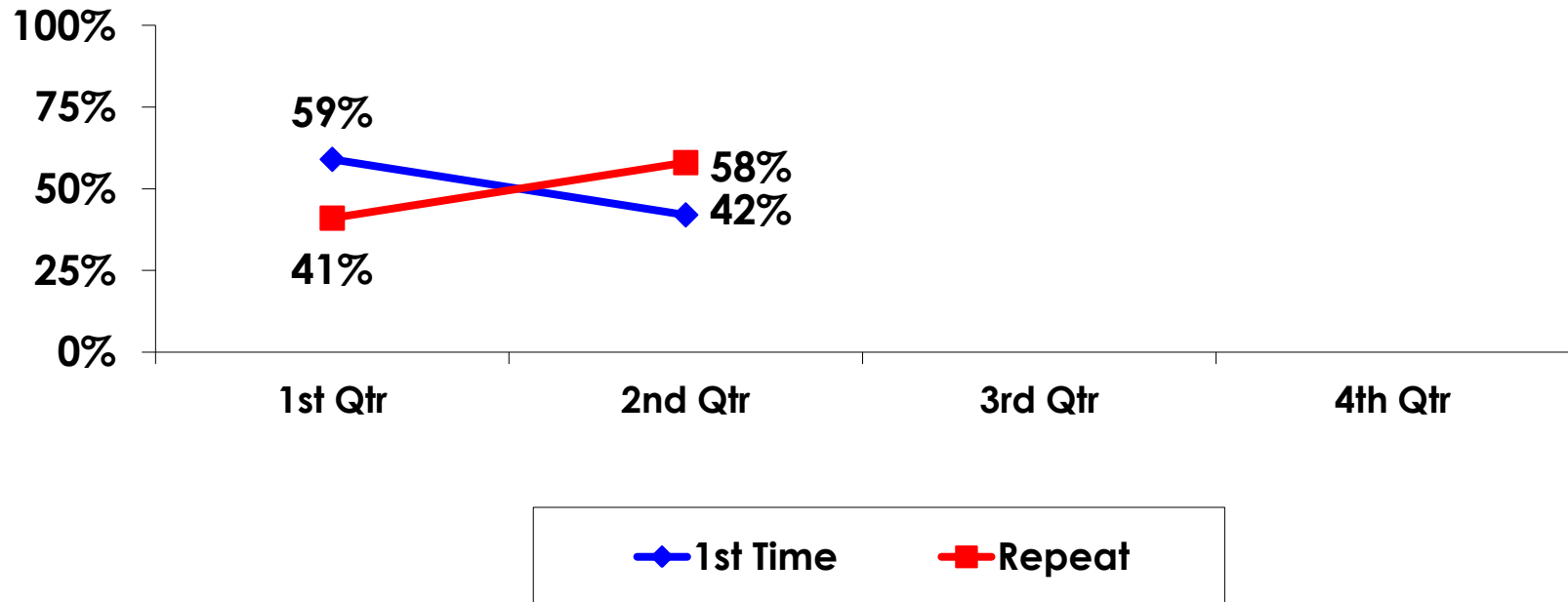
AGE- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	5		1			5					
		Column N %	3%		3%			9%					
	25-34	Count	42	36	12	24		42		34			
		Column N %	28%	28%	35%	41%		72%		40%			
	35-49	Count	64	58	14	28		11	53	40			1
		Column N %	43%	46%	41%	48%		19%	67%	48%			100%
	50+	Count	38	33	7	6			26	10		5	
		Column N %	26%	26%	21%	10%			33%	12%		100%	
	Total	Count	149	127	34	58		58	79	84		5	1
QF	Mean		40.55	41.10	39.38	37.21		30.90	44.63	37.76		65.60	36.00

INCOME - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q27	<732,321	Count	6	1				3	1	1		2	
		Column N %	4%	1%				5%	1%	1%		40%	
	732,321-1,098,481	Count	30	19	6	14		14	15	12		1	1
		Column N %	20%	15%	17%	24%		25%	19%	14%		20%	100%
	1,098,482-1,464,642	Count	67	65	20	31		25	35	42		1	
		Column N %	45%	51%	57%	53%		45%	45%	50%		20%	
	1,464,643-1,830,803	Count	32	31	5	10		10	18	21		1	
		Column N %	22%	24%	14%	17%		18%	23%	25%		20%	
	1,830,803-2,263,124	Count	10	9	3	3		3	7	6			
		Column N %	7%	7%	9%	5%		5%	9%	7%			
	2,563,125-3,661,606	Count	3	3	1	1		1	2	2			
		Column N %	2%	2%	3%	2%		2%	3%	2%			
Total		Count	148	128	35	59		56	78	84		5	1

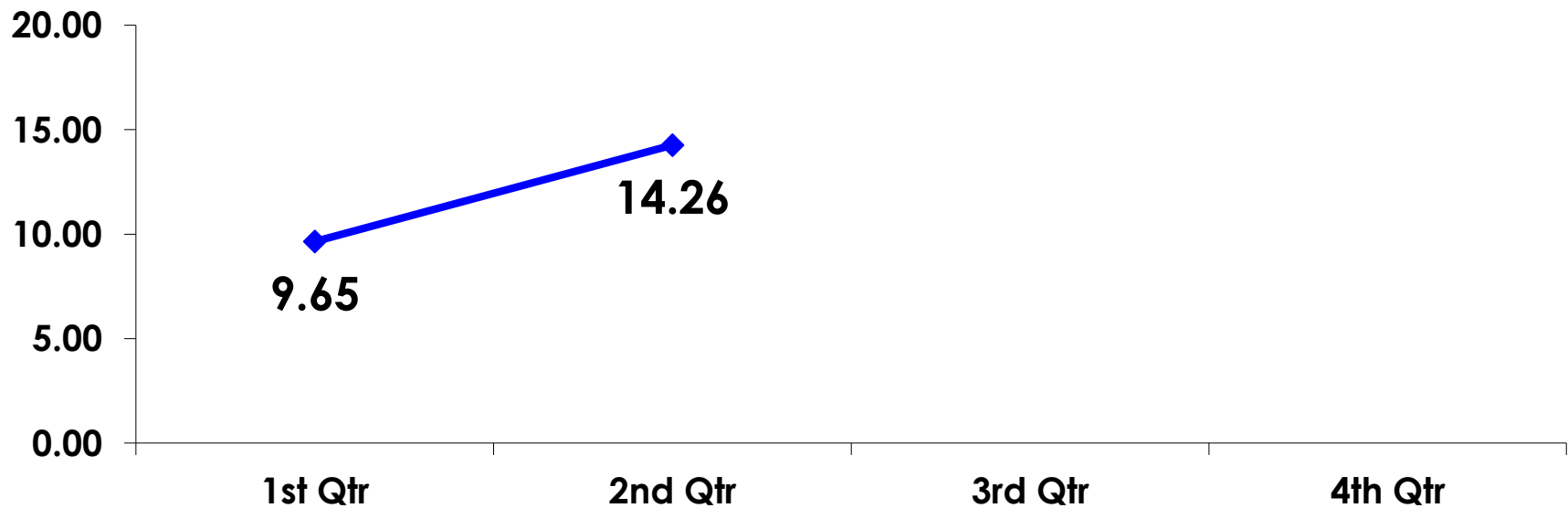
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	64	49	14	23		25	32	31		2	1
		Column N %	42%	38%	39%	39%		43%	41%	36%		40%	100%
	No	Count	87	80	22	36		33	47	54		3	
		Column N %	58%	62%	61%	61%		57%	59%	64%		60%	
	Total	Count	151	129	36	59		58	79	85		5	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	2	2	1	1			2	1			
		Column N %	1%	2%	3%	2%			3%	1%			
	3	Count	2	1		1		1	1	1			
		Column N %	1%	1%		2%		2%	1%	1%			
	4+	Count	145	126	35	57		55	76	83		5	1
		Column N %	97%	98%	97%	97%		98%	96%	98%		100%	100%
	Total	Count	149	129	36	59		56	79	85		5	1
Q8	Mean		14.26	14.53	13.14	13.41		13.59	13.61	13.80		13.40	18.00
	Median		14	14	14	14		14	14	14		14	18

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	28	27	9	15		14	12	26		1	
		Column N %	19%	21%	26%	26%		25%	15%	31%		20%	
	Free-time package tour	Count	37	35	8	10		12	20	20		1	
		Column N %	25%	28%	24%	18%		22%	26%	24%		20%	
	Individually arranged travel (FIT)	Count	81	64	17	32		29	45	37		3	1
		Column N %	55%	51%	50%	56%		53%	58%	45%		60%	100%
	Other	Count	1						1				
		Column N %	1%						1%				
	Total	Count	147	126	34	57		55	78	83		5	1

TRAVEL MOTIVATION - SEGMENTATION

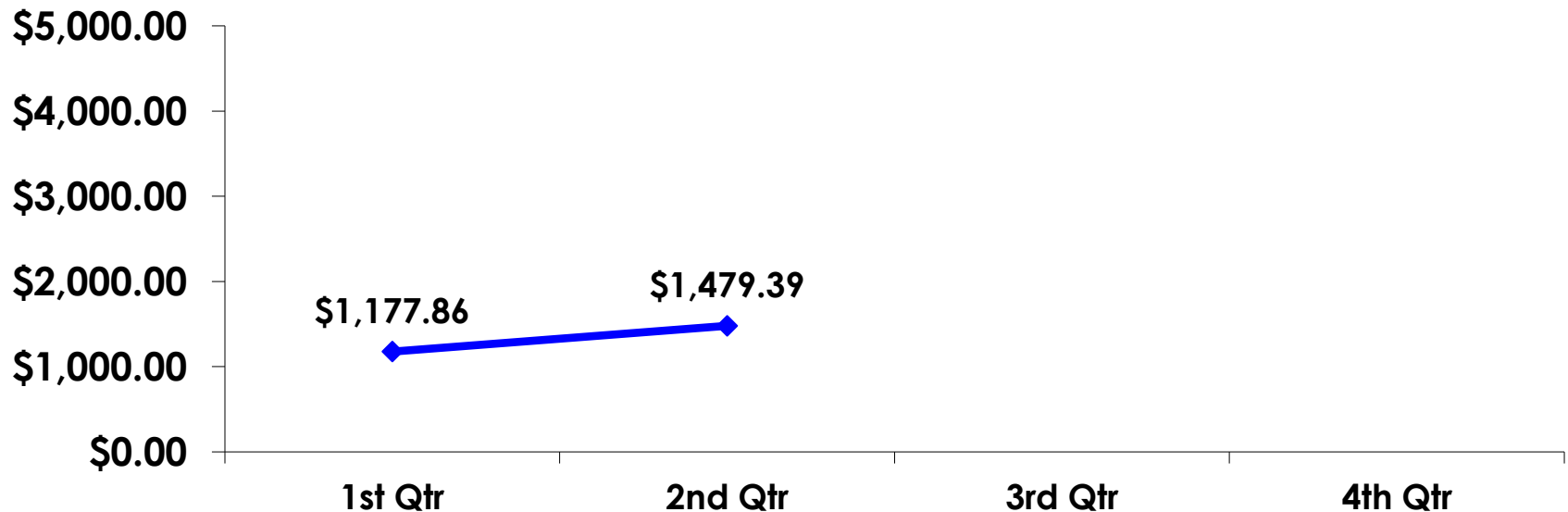
			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q5A	Natural beauty	Count	151	129	36	59		58	79	85		5	1
		Column N %	100%	100%	100%	100%		100%	100%	100%		100%	100%
	No Visa required	Count	149	127	35	57		57	78	84		5	1
		Column N %	99%	98%	97%	97%		98%	99%	99%		100%	100%
	Short travel time	Count	137	116	32	54		55	70	78		4	1
		Column N %	91%	90%	89%	92%		95%	89%	92%		80%	100%
	Safe	Count	129	114	33	51		45	70	77		5	1
		Column N %	85%	88%	92%	86%		78%	89%	91%		100%	100%
	Relax	Count	124	109	28	48		46	68	71		4	1
		Column N %	82%	84%	78%	81%		79%	86%	84%		80%	100%
	Previous trip	Count	86	79	21	35		32	47	53		3	
		Column N %	57%	61%	58%	59%		55%	59%	62%		60%	
	Recomm- friend/family/trvl agnt	Count	33	26	3	11		12	16	15		3	
		Column N %	22%	20%	8%	19%		21%	20%	18%		60%	
	Pleasure	Count	25	21	7	10		9	14	15			
		Column N %	17%	16%	19%	17%		16%	18%	18%			
	Other	Count	16	14	3	5		7	5	13		3	
		Column N %	11%	11%	8%	8%		12%	6%	15%		60%	
	Shopping	Count	5	4	1	2		3	2	4			
		Column N %	3%	3%	3%	3%		5%	3%	5%			
	Organized sports	Count	1						1				1
		Column N %	1%						1%				100%
	Visit friends/ Relatives	Count	1	1	1	1		1		1			
		Column N %	1%	1%	3%	2%		2%		1%			
	Price	Count	1			1				1			
		Column N %	1%			2%				1%			
	Total	Count	151	129	36	59		58	79	85		5	1

INFORMATION SOURCES - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q1	Friend/ Relative	Count	106	88	24	42		46	51	61		3	1
		Column N %	70%	68%	67%	71%		79%	65%	72%		60%	100%
	Internet	Count	105	90	25	40		50	50	65			1
		Column N %	70%	70%	69%	68%		86%	63%	76%			100%
	Prior Trip	Count	86	79	21	35		32	47	53		3	
		Column N %	57%	61%	58%	59%		55%	59%	62%		60%	
	Travel Agent Brochure	Count	6	6	2	3		2	4	5			
		Column N %	4%	5%	6%	5%		3%	5%	6%			
	Other	Count	2	1		1		1	1	1			
		Column N %	1%	1%		2%		2%	1%	1%			
	TV	Count	2	2	1				2	2			
		Column N %	1%	2%	3%				3%	2%			
	Travel Guidebook-Bookstore	Count	1	1	1				1	1			
		Column N %	1%	1%	3%				1%	1%			
	Magazine (Consumer)	Count	1	1					1	1			
		Column N %	1%	1%					1%	1%			
	Total	Count	151	129	36	59		58	79	85		5	1

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$1,329.13

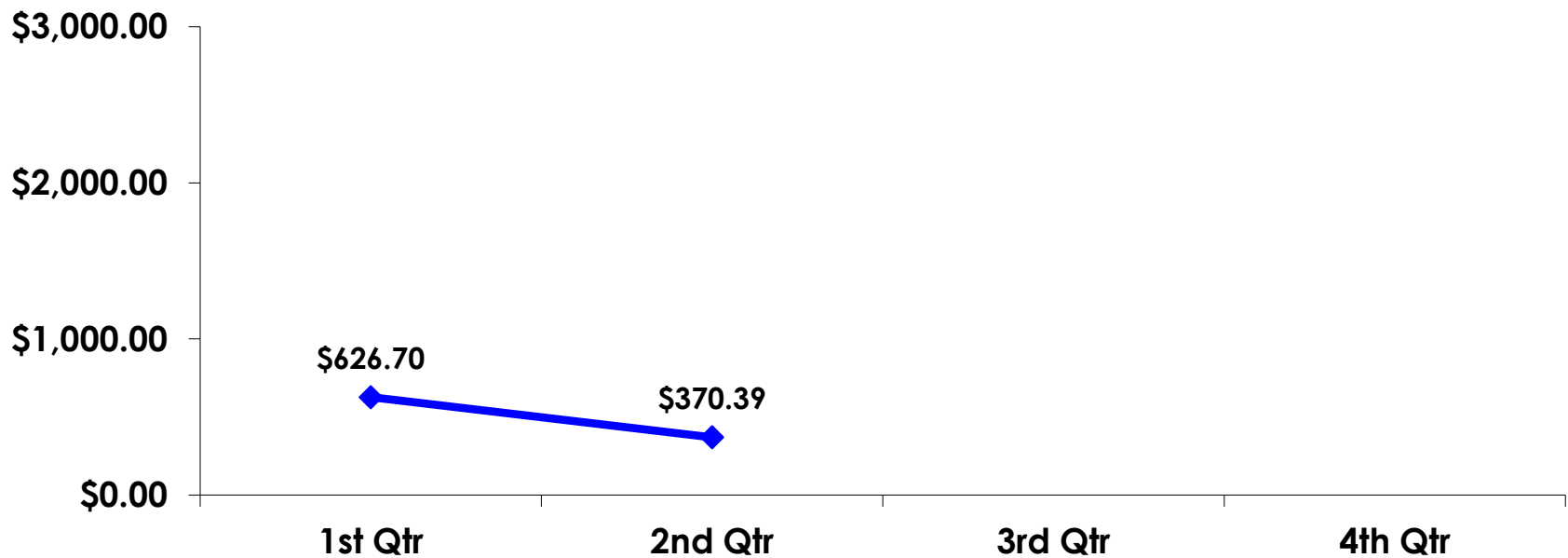
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
RUB\$	Mean	\$1,479.39	\$1,570.62	\$1,423.04	\$1,461.35	.	\$1,204.51	\$1,715.28	\$1,433.52	.	\$907.67	\$2,816.90
	Median	\$1,408	\$1,453	\$1,341	\$1,408	.	\$1,291	\$1,476	\$1,375	.	\$760	\$2,817

PREPAID EXPENSE- BREAKDOWN

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
AIR/ HOTEL	Mean	\$3,565.19	\$3,685.79	\$3,735.35	\$3,739.58	.	\$3,584.07	\$3,573.99	\$3,859.55	.	\$2,280.35	\$2,816.90
	Median	\$3,487.59	\$3,802.82	\$4,024.14	\$4,024.14	.	\$3,856.47	\$3,353.45	\$3,957.08	.	\$2,280.35	\$2,816.90
AIR/ HOTEL/ MEAL	Mean	\$5,421.49	\$5,460.13	\$5,680.30	\$5,231.39	.	\$5,585.80	\$5,408.21	\$5,792.23	.	\$4,828.97	.
AIR	Mean	\$2,912.10	\$3,614.53	.	\$1,632.01	.	.	\$2,912.10	\$4,054.33	.	.	.
	Median	\$1,670.02	\$2,072.43	.	\$1,609.66	.	.	\$1,670.02	\$2,072.43	.	.	.
HOTEL	Mean	\$2,929.60	\$2,929.60	.	\$2,045.61	.	.	\$2,929.60	\$1,989.72	.	.	.
	Median	\$1,971.97	\$1,971.97	.	\$2,045.61	.	.	\$1,971.97	\$1,877.93	.	.	.
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	\$3,868.40	\$4,351.46	\$4,130.71	\$3,700.39	.	\$3,436.48	\$4,277.61	\$4,462.38	.	\$2,387.66	\$2,816.90
	Median	\$4,024.14	\$4,359.49	\$4,238.77	\$4,292.42	.	\$3,990.61	\$4,158.28	\$4,560.70	.	\$2,280.35	\$2,816.90

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$498.12

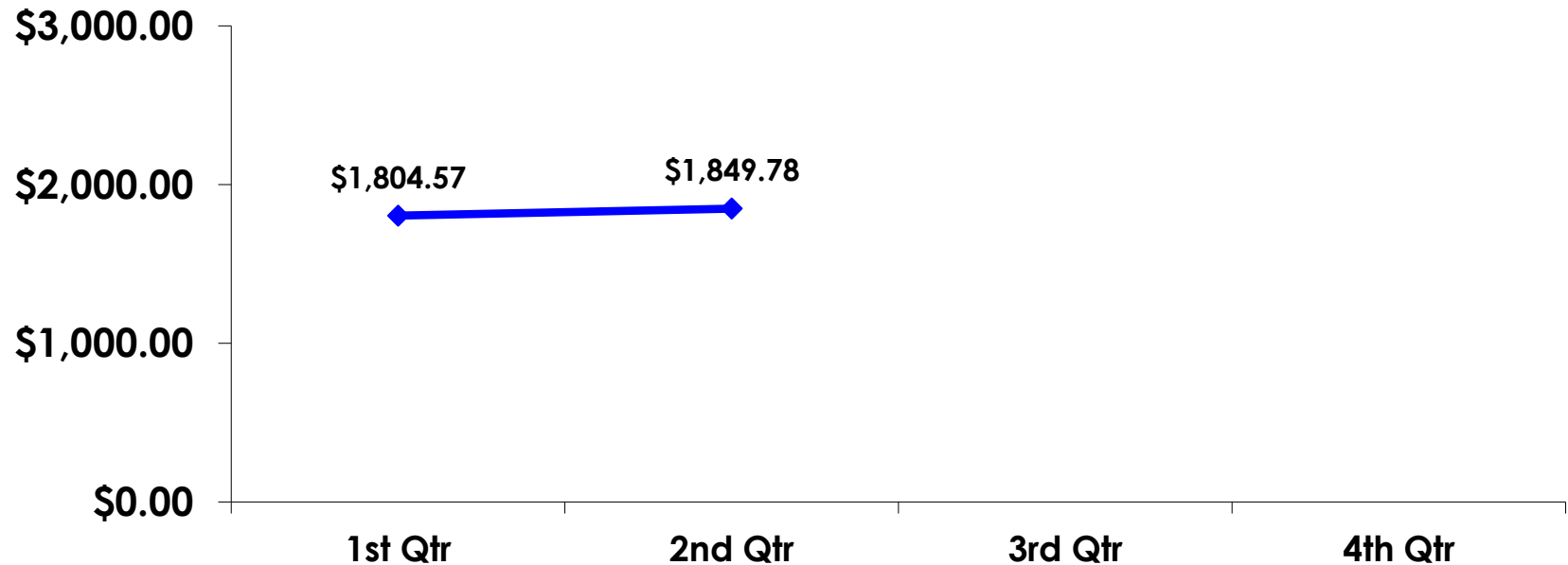
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
ONISLE	Mean	\$370.39	\$335.92	\$350.15	\$348.45	.	\$325.84	\$408.46	\$274.24	.	\$316.00	\$800.00
	Median	\$300	\$278	\$283	\$273	.	\$256	\$360	\$250	.	\$247	\$800

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$112.44	\$120.57	\$87.92	\$131.19	.	\$104.91	\$122.33	\$119.71	.	\$54.00	\$60.00
F&B FF/STORE	Mean	\$87.23	\$93.97	\$112.08	\$100.00	.	\$80.26	\$93.51	\$100.91	.	\$74.00	\$30.00
F&B RESTRNT	Mean	\$121.56	\$124.19	\$132.92	\$113.56	.	\$111.98	\$136.71	\$116.47	.	\$32.00	\$370.00
OPT TOUR	Mean	\$91.79	\$99.30	\$128.89	\$73.56	.	\$67.93	\$112.28	\$106.00	.	\$48.00	\$100.00
GIFT- SELF	Mean	\$196.16	\$198.68	\$238.06	\$181.36	.	\$192.41	\$202.03	\$187.18	.	\$174.00	\$150.00
GIFT- OTHER	Mean	\$88.11	\$90.19	\$87.64	\$73.31	.	\$79.66	\$96.52	\$85.29	.	\$112.00	\$50.00
TRANS	Mean	\$133.64	\$149.30	\$119.03	\$139.75	.	\$96.38	\$164.05	\$128.45	.	\$60.00	\$40.00
OTHER	Mean	\$24.27	\$22.75	\$25.28	\$19.58	.	\$25.26	\$25.19	\$24.41	.	\$0.00	\$0.00
TOTAL	Mean	\$855.21	\$898.96	\$931.81	\$832.29	.	\$758.79	\$952.61	\$868.41	.	\$554.00	\$800.00

TOTAL EXPENDITURES – TRACKING



YTD=\$1,827.25

TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
TOTPP	Mean	\$1,849.78	\$1,906.54	\$1,773.19	\$1,809.79	.	\$1,530.35	\$2,123.74	\$1,707.75	.	\$1,223.67	\$3,616.90
	Median	\$1,809	\$1,821	\$1,801	\$1,735	.	\$1,499	\$1,936	\$1,620	.	\$983	\$3,617

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 2016			
	1st Qtr	2nd Qtr	Combine d 1-2 Qtr 2016
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks		1	1
Ease of getting around			
Safety walking around at night			
Quality of daytime tours	3		
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours	4		
Quality of shopping			
Variety of shopping	1		3
Price of things on Guam			
Quality of hotel accommodations	2		
Quality/cleanliness of air, sky		2	4
Quality/cleanliness of parks			
Quality of landscape in Tumon			
Quality of landscape in Guam			
Quality of ground handler			
Quality/cleanliness of transportation vehicles			2
% of Per Person On Island Expenditures Accounted For	65.9%	88.3%	82.4%
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 2016 Period. By rank order they are:
 - **Quality & cleanliness of beaches and parks, and**
 - **Quality/cleanliness of air, sky.**
- With these factors, the overall r^2 is .883 meaning that **88.3% 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 2016			
	1st Qtr	2nd Qtr	Combine d 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	1		1
Quality of nighttime tours			
Variety of nighttime tours	2		
Quality of shopping			
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	4		
Quality of landscape in Guam		1	
Quality of ground handler			
Quality/cleanliness of transportation vehicles	3		
% of Per Person On Island Expenditures Accounted For	34.8%	16.0%	18.1%
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 one significant factor in the Second Quarter 2016 Period. It is:
 - **Quality of landscape in Guam.**
- With this factor, the overall r^2 is .160 meaning that **16.0% of per person on island expenditure is accounted for by this factor.**