



# GUAM VISITORS BUREAU

## Russia Visitor Tracker Exit Profile

### FY2016 Market Segmentation

#### 3<sup>RD</sup> QTR. (APR~JUN 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 **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.

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# 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.

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# Highlighted Segments Parameters

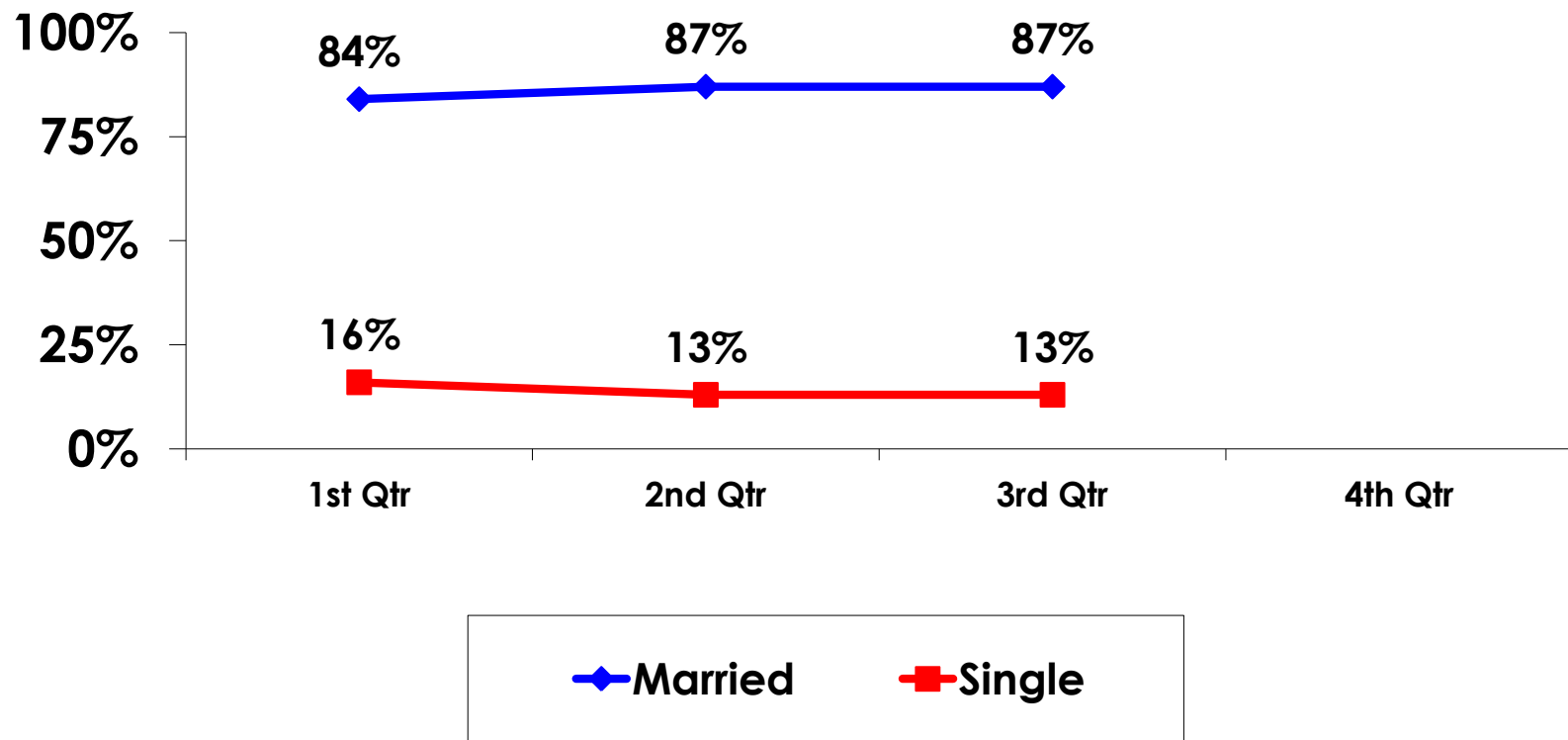
- Families – Q.6
- Adventure traveler – Q.18/19/23
- Wife – Q.E/ Gender
- MICE– Q.5A
- 18-35 – Q.F
- 36-55 – Q.F
- Child – Q.6
- Wedding/ Honeymoon – Q.5A
- Senior – Q.F
- Sports competition – Q.5A

# Highlighted Segments

	1 <sup>st</sup> QTR	2 <sup>nd</sup> QTR	3 <sup>rd</sup> QTR	4 <sup>th</sup> QTR
<b>Families</b>	49%	85%	79%	
<b>Adventure traveler</b>	23%	24%	53%	
<b>Wives</b>	39%	39%	41%	
<b>MICE</b>	18%	-%	2%	
<b>18-35</b>	24%	38%	29%	
<b>36-55</b>	63%	52%	57%	
<b>Child</b>	17%	56%	35%	
<b>Wedding/ Honeymoon</b>	-%	-%	-%	
<b>Seniors (60+)</b>	7%	3%	4%	
<b>Sports Competition</b>	1%	1%	1%	
<b>TOTAL</b>	<b>150</b>	<b>151</b>	<b>150</b>	

# SECTION 1 **PROFILE OF RESPONDENTS**

# MARITAL STATUS - TRACKING

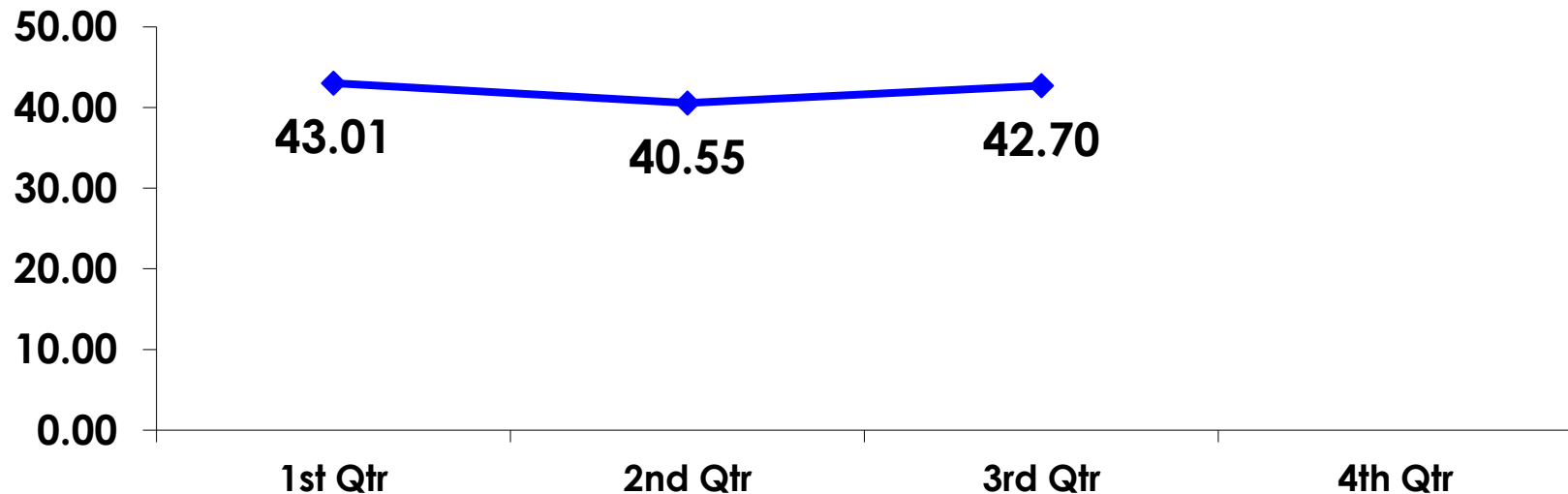


# MARITAL STATUS- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QE	Married	Count	129	113	73	62	2	38	79	50		3	1
		Column N %	87%	96%	94%	100%	67%	86%	92%	96%		60%	100%
	Single	Count	19	5	5		1	6	7	2		2	
		Column N %	13%	4%	6%		33%	14%	8%	4%		40%	
	Total	Count	148	118	78	62	3	44	86	52		5	1



# AVERAGE AGE - TRACKING



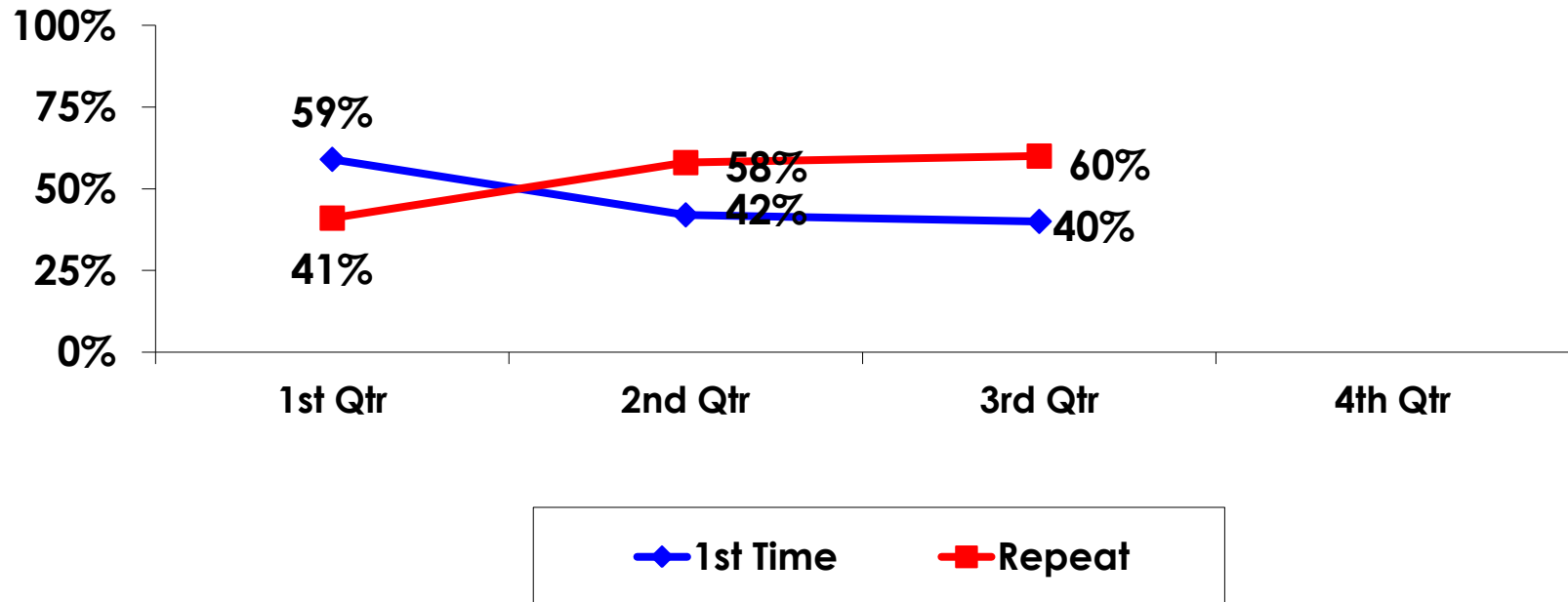
# AGE- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	7	2	3	1		7					
		Column N %	5%	2%	4%	2%		16%					
	25-34	Count	31	26	13	17		31		24			1
		Column N %	21%	22%	17%	28%		70%		46%			100%
	35-49	Count	63	57	45	25		6	57	21			
		Column N %	43%	49%	58%	41%		14%	66%	40%			
	50+	Count	47	32	17	18	3		29	7		6	
		Column N %	32%	27%	22%	30%	100%		34%	13%		100%	
	Total	Count	148	117	78	61	3	44	86	52		6	1
QF	Mean		42.70	42.48	41.83	42.44	55.67	30.68	45.60	38.44		61.17	34.00

# INCOME - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q27	<732,321	Count	5	3	1	3	2		1	1		3	
		Column N %	3%	3%	1%	5%	67%		1%	2%		50%	
	732,321-1,098,481	Count	58	39	31	29	1	14	31	13		3	1
		Column N %	39%	33%	39%	47%	33%	32%	36%	25%		50%	100%
	1,098,482-1,464,642	Count	64	57	40	23		21	42	29			
		Column N %	43%	48%	50%	37%		48%	49%	56%			
	1,464,643-1,830,803	Count	20	16	6	5		8	10	7			
		Column N %	13%	14%	8%	8%		18%	12%	13%			
	1,830,803-2,263,124	Count	2	2	1	1		1	1	1			
		Column N %	1%	2%	1%	2%		2%	1%	2%			
	2,563,125-3,661,606	Count	1	1	1	1			1	1			
		Column N %	1%	1%	1%	2%			1%	2%			
Total		Count	150	118	80	62	3	44	86	52		6	1

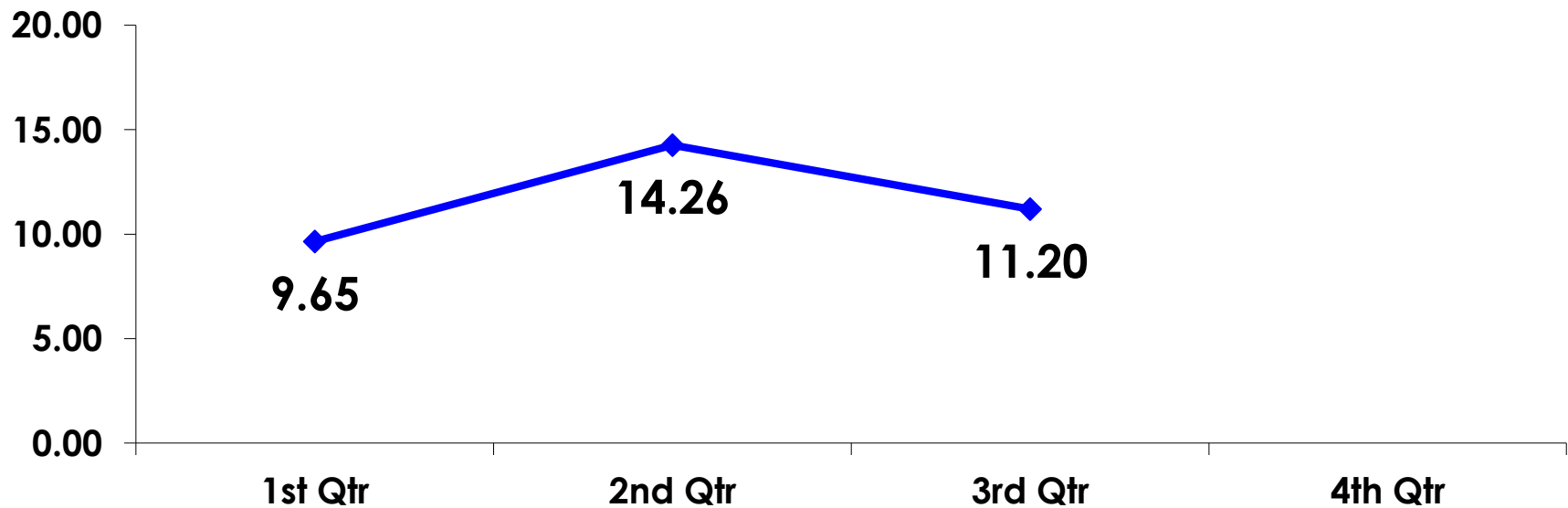
# PRIOR TRIPS TO GUAM - TRACKING



# PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	60	43	36	18		22	32	20		3	1
		Column N %	40%	37%	45%	30%		50%	38%	38%		50%	100%
	No	Count	89	74	44	43	3	22	53	32		3	
		Column N %	60%	63%	55%	70%	100%	50%	62%	62%		50%	
	Total	Count	149	117	80	61	3	44	85	52		6	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	1	1	1					1			
		Column N %	1%	1%	1%					1%			
	4+	Count	147	116	77	61	3	43	84	52		6	
		Column N %	99%	99%	99%	100%	100%	100%	99%	100%	100%	100%	
	Total	Count	148	117	78	61	3	43	85	52		6	
Q8	Mean		11.20	11.52	11.83	12.70	8.00	11.47	10.14	13.46		9.50	
	Median		10	10	10	10	7	10	10	10		9	

# 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	12	11	9	6		2	7	3		1	
		Column N %	8%	9%	11%	10%		5%	8%	6%		17%	
	Free-time package tour	Count	61	54	36	27	2	20	35	27		2	
		Column N %	41%	46%	45%	44%	67%	45%	41%	52%		33%	
	Individually arranged travel (FIT)	Count	76	53	35	29	1	22	44	22		3	1
		Column N %	51%	45%	44%	47%	33%	50%	51%	42%		50%	100%
	Total	Count	149	118	80	62	3	44	86	52		6	1

# TRAVEL MOTIVATION - SEGMENTATION

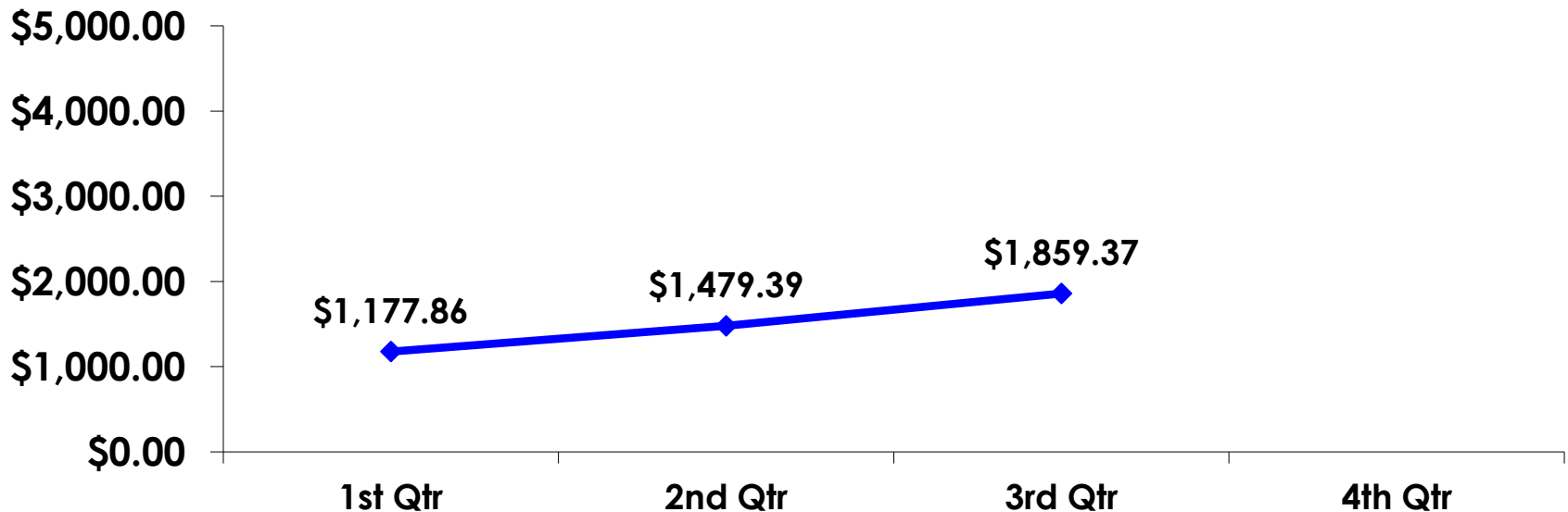
			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q5A	Natural beauty	Count	150	118	80	62	3	44	86	52		6	1
		Column N %	100%	100%	100%	100%	100%	100%	100%	100%	100%		100%
	No Visa required	Count	150	118	80	62	3	44	86	52		6	1
		Column N %	100%	100%	100%	100%	100%	100%	100%	100%	100%		100%
	Short travel time	Count	144	116	76	60	3	44	80	51		6	1
		Column N %	96%	98%	95%	97%	100%	100%	93%	98%		100%	100%
	Safe	Count	121	99	59	49		38	70	45		4	1
		Column N %	81%	84%	74%	79%		86%	81%	87%		67%	100%
	Relax	Count	110	89	49	40	3	33	61	38		5	
		Column N %	73%	75%	61%	65%	100%	75%	71%	73%		83%	
	Previous trip	Count	87	72	43	42	2	22	51	32		3	
		Column N %	58%	61%	54%	68%	67%	50%	59%	62%		50%	
	Pleasure	Count	49	38	31	18		15	32	14		1	
		Column N %	33%	32%	39%	29%		34%	37%	27%		17%	
	Recomm- friend/family/trvl agnt	Count	46	36	30	18	1	16	26	14		2	
		Column N %	31%	31%	38%	29%	33%	36%	30%	27%		33%	
	Other	Count	16	13	5	9		11	3	10			
		Column N %	11%	11%	6%	15%		25%	3%	19%			
	Shopping	Count	6	3	1			3		2		1	
		Column N %	4%	3%	1%			7%		4%		17%	
	Company/ Business Trip	Count	6	3	4	3		2	4	1			
		Column N %	4%	3%	5%	5%		5%	5%	2%			
	Visit friends/ Relatives	Count	4		3	1				2		2	
		Column N %	3%		4%	2%				2%		33%	
	Convention/ Trade/ Conference	Count	3	2	1	1	3		1	1		1	
		Column N %	2%	2%	1%	2%	100%		1%	2%		17%	
	Water sports	Count	3	2	2			1	2	1			
		Column N %	2%	2%	3%			2%	2%	2%			
	Scuba	Count	3	2	2			1	2	1			
		Column N %	2%	2%	3%			2%	2%	2%			
	Company Sponsored	Count	2		2	1			2				
		Column N %	1%		3%	2%			2%				
	Price	Count	2					1	1				
		Column N %	1%					2%	1%				
	Organized sports	Count	1		1			1					1
		Column N %	1%		1%			2%					100%
	Total	Count	150	118	80	62	3	44	86	52		6	1

# INFORMATION SOURCES - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q1	Internet	Count	120	97	72	49	2	37	76	41		3	1
		Column N %	81%	83%	90%	80%	67%	84%	89%	79%		50%	100%
	Friend/ Relative	Count	105	77	59	43	2	36	55	33		5	1
		Column N %	70%	66%	74%	70%	67%	82%	65%	63%		83%	100%
	Prior Trip	Count	89	74	44	43	3	22	53	32		3	
		Column N %	60%	63%	55%	70%	100%	50%	62%	62%		50%	
	Travel Agent Brochure	Count	11	9	6	6		5	6	4			
		Column N %	7%	8%	8%	10%		11%	7%	8%			
	Magazine (Consumer)	Count	3		2			1	2				
		Column N %	2%		3%			2%	2%				
	Consumer Trvl Show	Count	1		1	1			1				
		Column N %	1%		1%	2%			1%				
	Travel Trade Show	Count	1		1				1				
		Column N %	1%		1%				1%				
	TV	Count	1	1	1	1		1					
		Column N %	1%	1%	1%	2%		2%					
	Total	Count	149	117	80	61	3	44	85	52		6	1

# SECTION 3 **EXPENDITURES**

# PREPAID EXPENDITURES - TRACKING



YTD=\$1,505.48

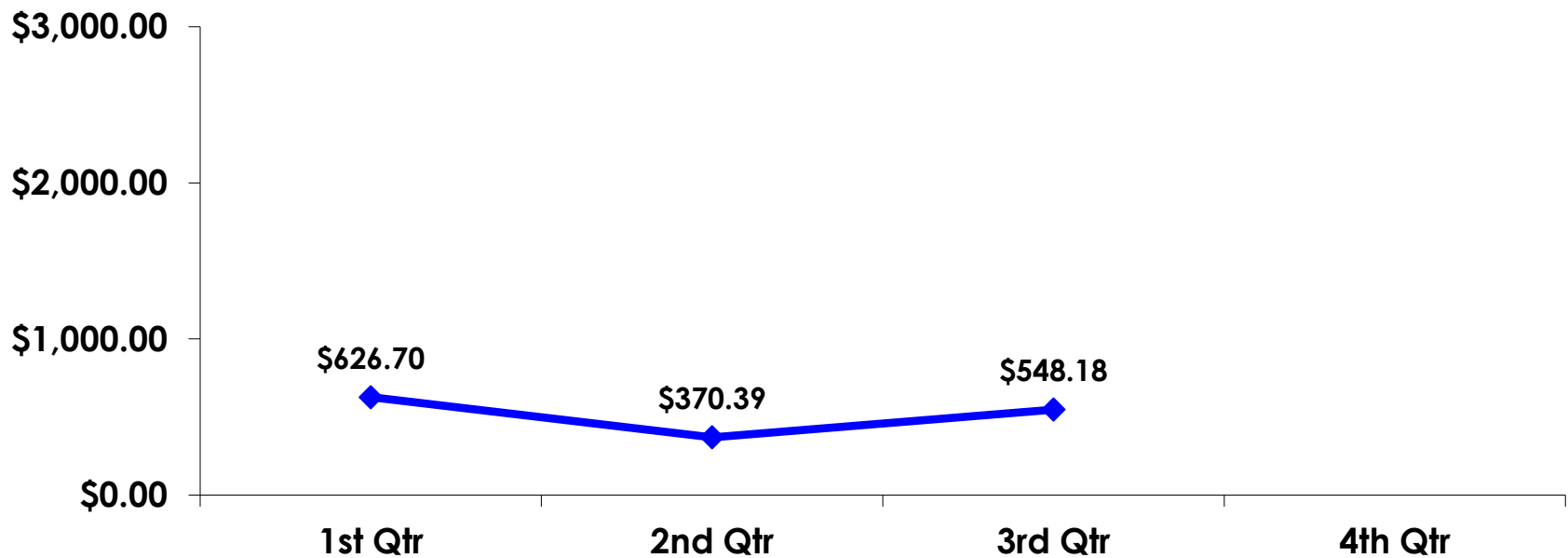
# PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
RUB\$	Mean	\$1,859.37	\$1,912.54	\$2,036.27	\$1,636.65	\$875.09	\$1,316.59	\$2,284.62	\$1,639.96	.	\$945.09	\$0.00
	Median	\$1,875	\$1,906	\$2,100	\$1,738	\$0	\$1,475	\$2,250	\$1,719	.	\$623	\$0

# PREPAID EXPENSE- BREAKDOWN

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
AIR/ HOTEL	Mean	\$4,955.35	\$5,421.97	\$5,346.08	\$4,425.44	\$5,250.53	\$5,072.38	\$5,131.76	\$6,107.75	.	\$645.06	.
	Median	\$4,350.44	\$5,250.53	\$5,250.53	\$3,750.38	\$5,250.53	\$4,800.48	\$4,800.48	\$6,000.60	.	\$645.06	.
AIR/ HOTEL/ MEAL	Mean	\$5,243.86	\$5,313.32	\$5,192.56	\$5,133.85	.	\$5,469.30	\$5,203.02	\$5,529.12	.	\$4,425.44	.
AIR	Mean	\$1,714.46	\$2,070.21	\$1,300.13	\$1,837.68	.	\$2,250.23	\$1,550.16	\$2,250.23	.	\$600.06	.
	Median	\$1,500.15	\$2,100.21	\$1,050.11	\$1,875.19	.	\$2,250.23	\$1,500.15	\$2,250.23	.	\$600.06	.
HOTEL	Mean	\$4,219.17	\$4,642.96	\$5,400.54	\$6,263.13	.	\$6,263.13	\$2,175.22	\$6,263.13	.	.	.
	Median	\$3,037.80	\$3,750.38	\$5,400.54	\$6,338.13	.	\$6,338.13	\$2,100.21	\$6,338.13	.	.	.
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	\$4,167.47	\$4,793.81	\$4,685.72	\$3,767.92	\$1,750.18	\$3,916.58	\$4,809.20	\$5,190.66	.	\$1,682.67	\$0.00
	Median	\$4,350.44	\$5,138.01	\$4,762.98	\$3,825.38	\$0.00	\$4,050.41	\$4,800.48	\$5,400.54	.	\$622.56	\$0.00

# ON-ISLAND EXPENDITURES - TRACKING



YTD = \$514.77



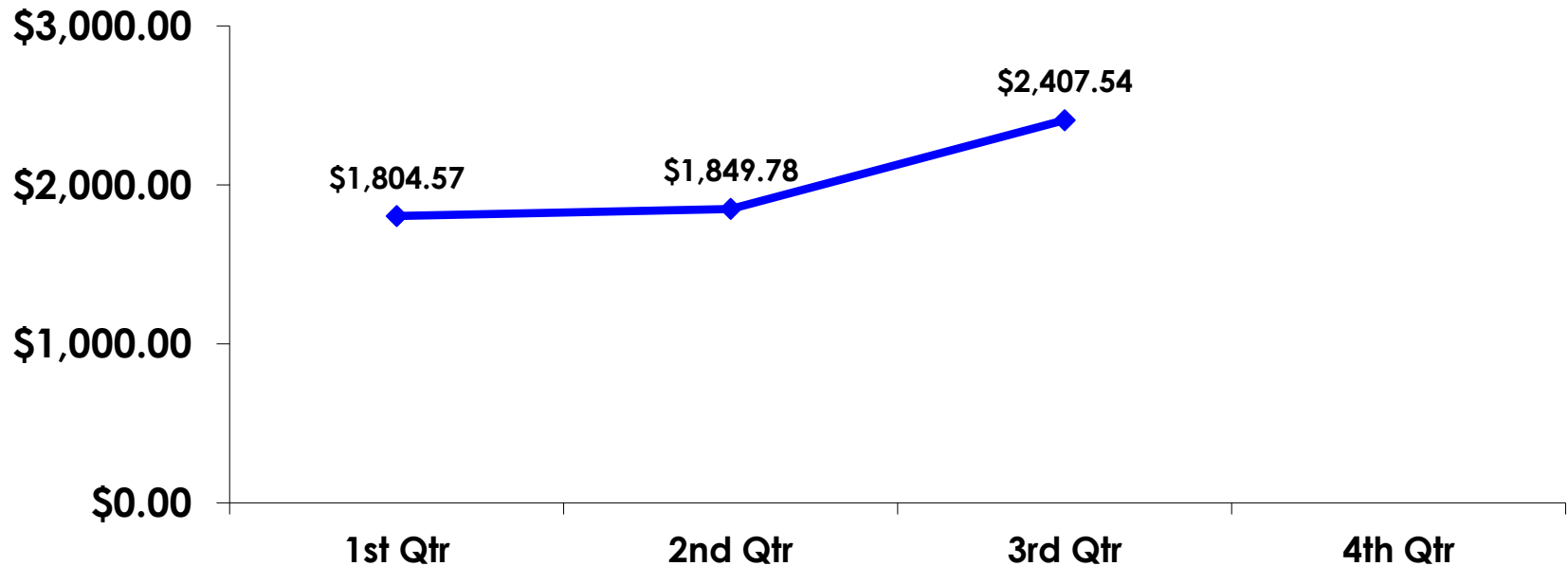
# ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
ONISLE	Mean	\$548.18	\$477.68	\$574.91	\$486.32	\$388.33	\$473.05	\$570.73	\$405.08	.	\$579.17	\$1,160.00
	Median	\$498	\$439	\$500	\$458	\$390	\$355	\$500	\$350	.	\$550	\$1,160

# ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$175.23	\$185.34	\$185.00	\$165.48	\$136.67	\$193.18	\$186.22	\$205.00	.	\$35.00	\$200.00
F&B FF/STORE	Mean	\$48.54	\$48.86	\$51.56	\$57.26	\$0.00	\$58.55	\$43.66	\$57.81	.	\$60.00	\$40.00
F&B RESTRNT	Mean	\$138.30	\$140.76	\$146.94	\$131.53	\$56.67	\$131.59	\$142.15	\$148.46	.	\$135.00	\$120.00
OPT TOUR	Mean	\$177.57	\$176.31	\$233.75	\$124.84	\$60.00	\$142.39	\$217.21	\$156.83	.	\$68.33	\$400.00
GIFT- SELF	Mean	\$210.93	\$223.39	\$225.81	\$185.24	\$143.33	\$199.89	\$217.73	\$253.17	.	\$241.67	\$200.00
GIFT- OTHER	Mean	\$96.13	\$96.69	\$96.81	\$88.79	\$156.67	\$80.11	\$104.94	\$90.29	.	\$83.33	\$200.00
TRANS	Mean	\$166.77	\$190.81	\$183.13	\$169.76	\$53.33	\$154.20	\$181.63	\$202.69	.	\$51.67	\$0.00
OTHER	Mean	\$47.86	\$54.41	\$76.36	\$93.55	\$3.33	\$124.77	\$14.42	\$110.19	.	\$33.33	\$0.00
TOTAL	Mean	\$1,061.33	\$1,116.58	\$1,199.36	\$1,016.45	\$610.00	\$1,084.68	\$1,107.97	\$1,224.44	.	\$708.33	\$1,160.00

# TOTAL EXPENDITURES – TRACKING



YTD=\$2,020.25

# TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
TOTPP	Mean	\$2,407.54	\$2,390.22	\$2,611.18	\$2,122.97	\$1,263.42	\$1,789.65	\$2,855.34	\$2,045.04	.	\$1,524.26	\$1,160.00
	Median	\$2,305	\$2,330	\$2,479	\$2,190	\$500	\$1,750	\$2,787	\$2,075	.	\$1,423	\$1,160

# SECTION 4 **ADVANCED STATISTICS**

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# 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.

<b>Comparison of Drivers of Overall Satisfaction, 1st,2nd,3rd Qtr and Overall 1-3 Qtr 2016</b>				
	1st Qtr	2nd Qtr	3rd Qtr	Combin ed 1-3 Qtr 2016
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks		1	1	1
Ease of getting around				
Safety walking around at night				
Quality of daytime tours	3			
Variety of daytime tours				3
Quality of nighttime tours				
Variety of nighttime tours	4			
Quality of shopping				
Variety of shopping	1			5
Price of things on Guam			2	
Quality of hotel accommodations	2			2
Quality/cleanliness of air, sky		2	3	6
Quality/cleanliness of parks				
Quality of landscape in Tumon				
Quality of landscape in Guam			4	
Quality of ground handler				
Quality/cleanliness of transportation vehicles				4
% of Per Person On Island Expenditures Accounted For	65.9%	88.3%	56.8%	73.6%
NOTE: Only significant drivers are included.				

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# DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Russian visitor's experience on Guam is driven by four significant factors in the Third Quarter 2016 Period. By rank order they are:
  - **Quality & cleanliness of beaches & parks,**
  - **Price of things on Guam,**
  - **Quality/cleanliness of air, sky, and**
  - **Quality of landscape on Guam.**
- With these factors, the overall  $r^2$  is .568 meaning that **56.8%** of overall satisfaction is accounted for by these factors.



<b>Comparison of Drivers of Per Person On-Island Expenditures, 1st,2nd,3rd Qtrs 2016, and Overall 1-3rd Qtrs 2016</b>				
	1st Qtr	2nd Qtr	3rd Qtr	Combin ed 1-3 Qtr 2016
Drivers:	rank	rank	<b>rank</b>	rank
Quality & Cleanliness of beaches & parks			<b>2</b>	4
Ease of getting around				
Safety walking around at night			<b>1</b>	
Quality of daytime tours				1
Variety of daytime tours	1			
Quality of nighttime tours				5
Variety of nighttime tours	2			6
Quality of shopping				
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations				2
Quality/cleanliness of air, sky				
Quality/cleanliness of parks				
Quality of landscape in Tumon	4			
Quality of landscape in Guam		1		3
Quality of ground handler				
Quality/cleanliness of transportation vehicles	3			
% of Per Person On Island Expenditures Accounted For	34.8%	16.0%	<b>22.5%</b>	26.2%
NOTE: Only significant drivers are included.				

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# Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** of Russian visitors on Guam is driven by two significant factors in the Third Quarter 2016 Period. By rank order they are:
  - **Safety walking around at night, and**
  - **Quality & cleanliness of beaches & parks.**
- With these factors, the overall  $r^2$  is .225 meaning that **22.5% of per person on island expenditure is accounted for by these factors.**