



GUAM VISITORS BUREAU

Russia Visitor Tracker Exit Profile

FY2016 Market Segmentation

4TH QTR (JUL~SEPT 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 **125** 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 **125** is +/- 8.7 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 +/- 8.7 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

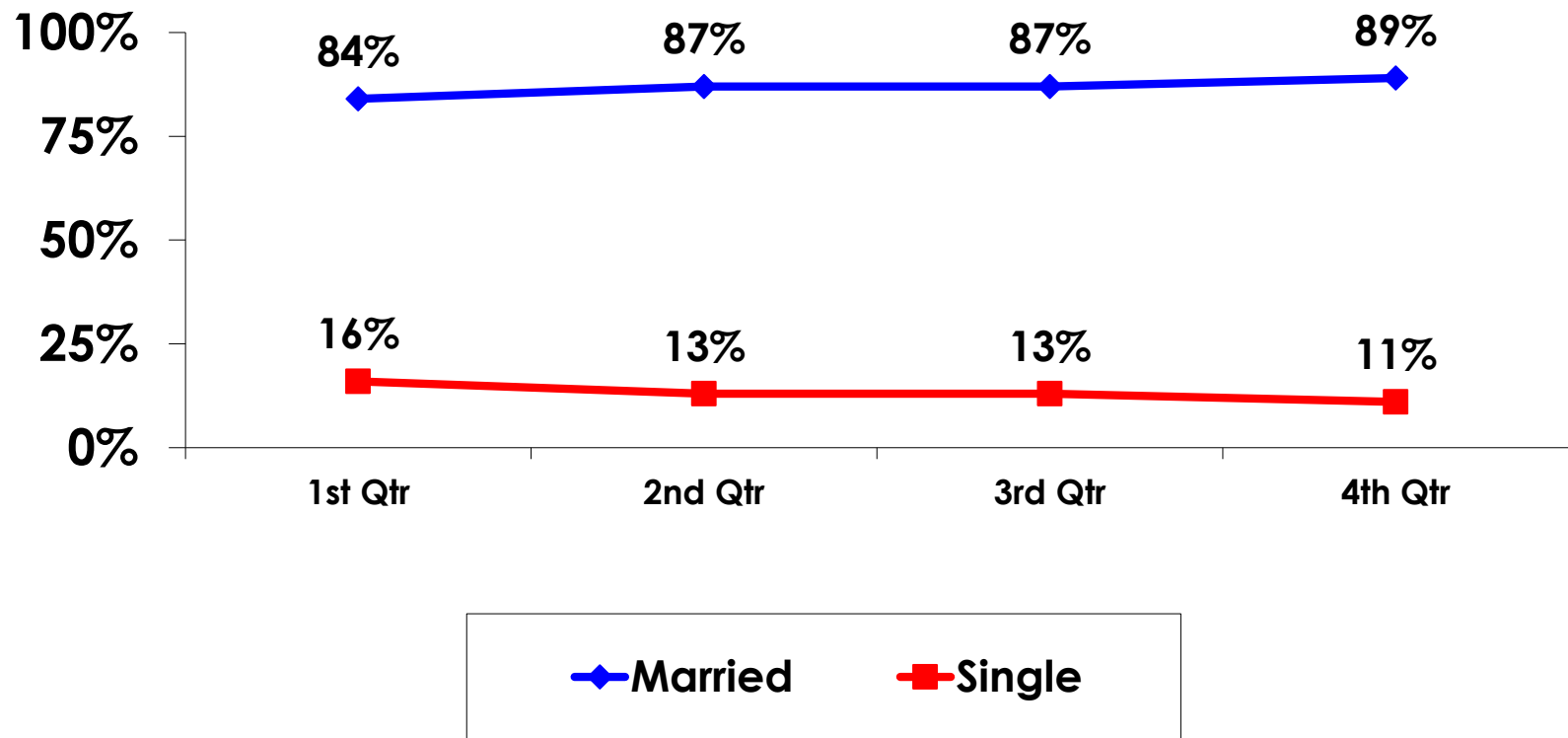
- Families – Q.6
- Adventure traveler – Q.18/19/23
- Wife – Q.E/ Gender
- MICE– Q.5A
- 18-35 – Q.F
- 36-55 – Q.F
- Child – Q.6
- Wedding/ Honeymoon – Q.5A
- Senior – Q.F
- Sports competition – Q.5A

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
Families	49%	85%	79%	69%
Adventure traveler	23%	24%	53%	47%
Wives	39%	39%	41%	42%
MICE	18%	-%	2%	-%
18-35	24%	38%	29%	34%
36-55	63%	52%	57%	62%
Child	17%	56%	35%	38%
Wedding/ Honeymoon	-%	-%	-%	-%
Seniors (60+)	7%	3%	4%	1%
Sports Competition	1%	1%	1%	1%
TOTAL	150	151	150	125

SECTION 1 **PROFILE OF RESPONDENTS**

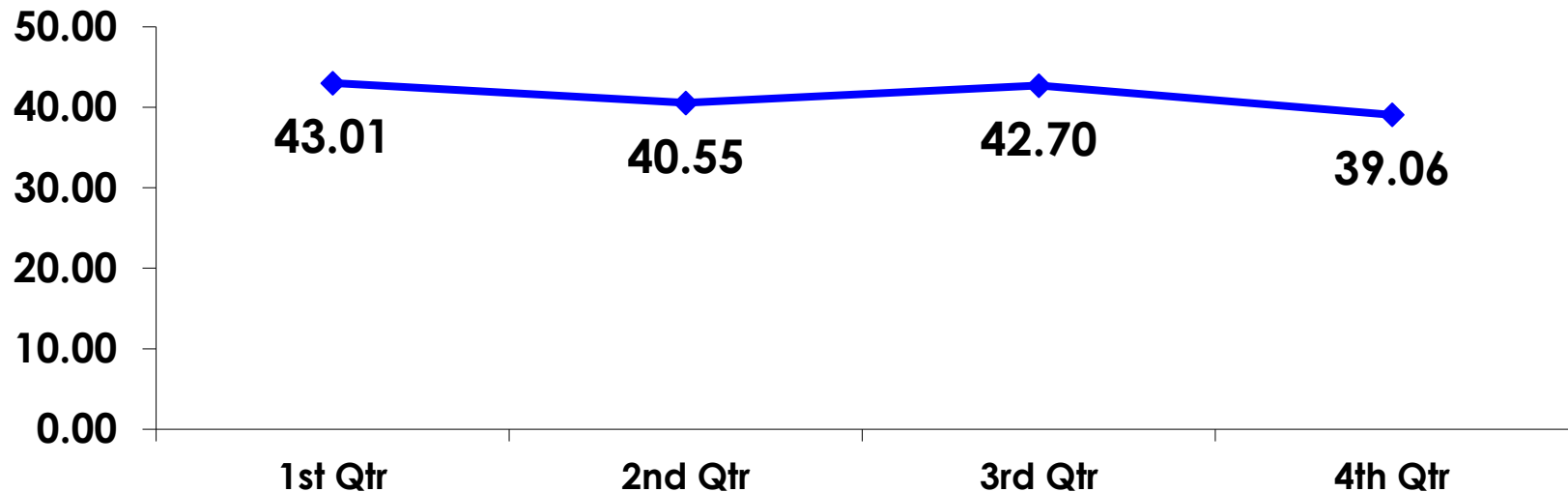
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QE	Married	Count	110	84	55	52		29	76	46		1	1
		Column N %	89%	98%	93%	100%		71%	97%	98%		100%	100%
	Single	Count	14	2	4			12	2	1			
		Column N %	11%	2%	7%			29%	3%	2%			
	Total	Count	124	86	59	52		41	78	47		1	1
		Column N %	100%	69%	47%	42%		33%	63%	32%		8%	8%

AVERAGE AGE - TRACKING



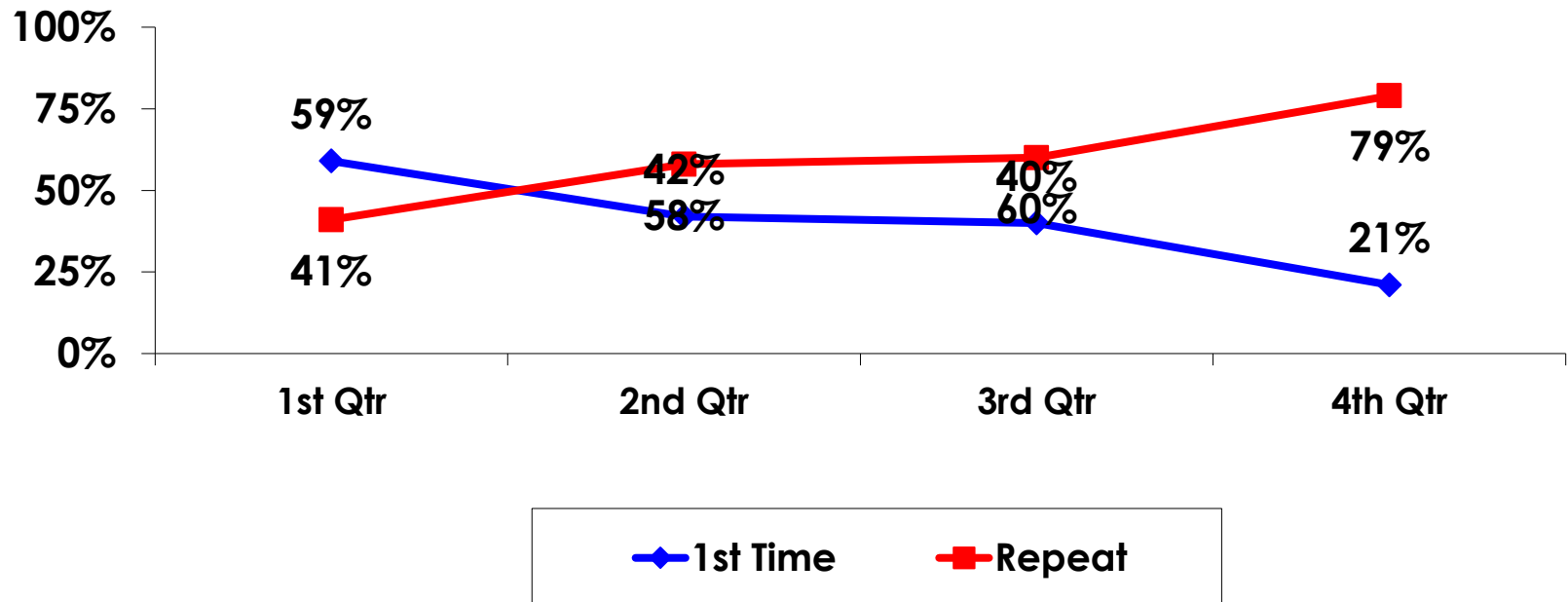
AGE- SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	8	2	4	1		8					
		Column N %	6%	2%	7%	2%		19%					
	25-34	Count	32	22	12	19		32		18			
		Column N %	26%	26%	20%	37%		76%		38%			
	35-49	Count	67	52	36	23		2	65	28			1
		Column N %	54%	60%	61%	44%		5%	83%	60%			100%
	50+	Count	18	10	7	9			13	1		1	
		Column N %	14%	12%	12%	17%			17%	2%		100%	
	Total	Count	125	86	59	52		42	78	47		1	1
QF	Mean		39.06	39.97	39.08	38.87	.	29.14	43.22	37.64	.	61.00	35.00

INCOME - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q27	<732,321	Count	3		1	2			2				
		Column N %	2%		2%	4%			3%				
	732,321-1,098,481	Count	68	41	30	31		26	41	21			
		Column N %	55%	48%	53%	60%		63%	53%	46%			
	1,098,482-1,464,642	Count	43	36	23	16		13	28	20			1
		Column N %	35%	42%	40%	31%		32%	36%	43%			100%
	1,464,643-1,830,803	Count	7	6	3	2		2	5	4			
		Column N %	6%	7%	5%	4%		5%	6%	9%			
	1,830,803-2,263,124	Count	2	2		1			2	1			
		Column N %	2%	2%		2%			3%	2%			
	Total	Count	123	85	57	52		41	78	46			1

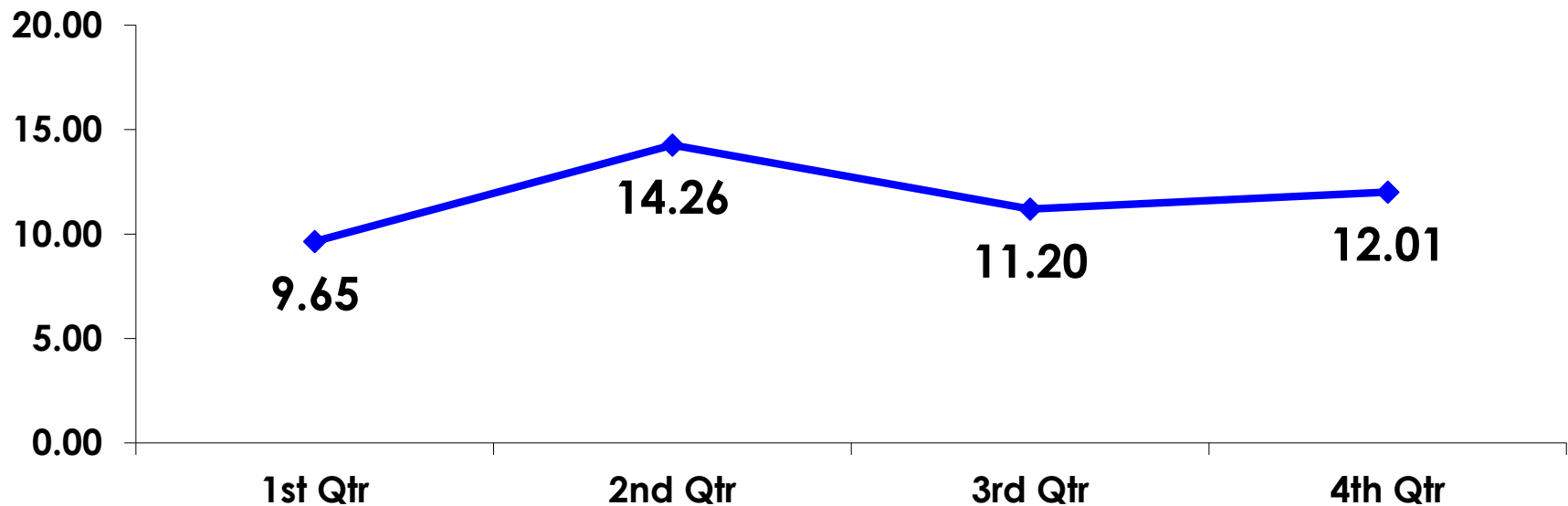
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	26	12	12	9		7	17	7			1
		Column N %	21%	14%	20%	17%		17%	22%	15%			100%
	No	Count	99	74	47	43		35	61	40		1	
		Column N %	79%	86%	80%	83%		83%	78%	85%		100%	
	Total	Count	125	86	59	52		42	78	47		1	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				
		Column N %	1%	1%					1%				
	4+	Count	124	85	59	52		42	77	47		1	1
		Column N %	99%	99%	100%	100%		100%	99%	100%		100%	100%
	Total Count		125	86	59	52		42	78	47		1	1
Q8	Mean		12.01	12.79	12.54	12.81	.	12.38	11.67	13.64	.	20.00	21.00
	Median		10	12	12	10	.	11	10	12	.	20	21

SECTION 2 **TRAVEL PLANNING**

TRAVEL PLANNING - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q7	Free-time package tour	Count	35	29	24	13		14	17	19		1	1
		Column N %	28%	34%	41%	25%		33%	22%	40%		100%	100%
	Individually arranged travel (FIT)	Count	83	57	35	36		27	55	28			
		Column N %	66%	66%	59%	69%		64%	71%	60%			
	Group tour	Count	1						1				
		Column N %	1%						1%				
	Company paid travel	Count	6			3		1	5				
		Column N %	5%			6%		2%	6%				
	Total	Count	125	86	59	52		42	78	47		1	1
		Column N %											

TRAVEL MOTIVATION - SEGMENTATION

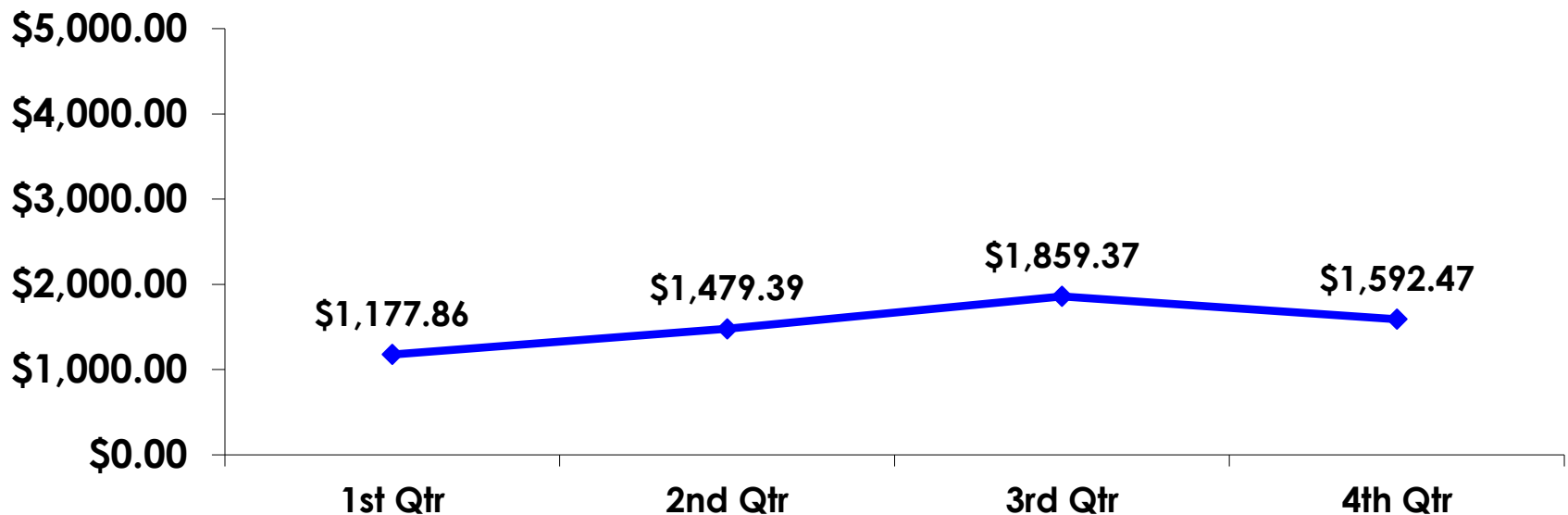
			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q5A	Natural beauty	Count	123	86	59	52		42	76	47		1	1
		Column N %	98%	100%	100%	100%		100%	97%	100%		100%	100%
	No Visa required	Count	121	85	58	52		42	74	47		1	1
		Column N %	97%	99%	98%	100%		100%	95%	100%		100%	100%
	Short travel time	Count	115	79	56	48		39	71	45		1	1
		Column N %	92%	92%	95%	92%		93%	91%	96%		100%	100%
	Relax	Count	103	73	46	43		38	62	40			1
		Column N %	82%	85%	78%	83%		90%	79%	85%			100%
	Previous trip	Count	99	74	47	43		35	61	40		1	
		Column N %	79%	86%	80%	83%		83%	78%	85%		100%	
	Safe	Count	98	72	48	43		32	62	40			1
		Column N %	78%	84%	81%	83%		76%	79%	85%			100%
	Pleasure	Count	27	24	19	6		11	16	11			
		Column N %	22%	28%	32%	12%		26%	21%	23%			
	Recomm- friend/family/trvl agnt	Count	17	9	5	9		5	10	6			1
		Column N %	14%	10%	8%	17%		12%	13%	13%			100%
	Shopping	Count	14	4	3	6		7	6	3			
		Column N %	11%	5%	5%	12%		17%	8%	6%			
	Other	Count	11	9	4	6		5	5	9		1	
		Column N %	9%	10%	7%	12%		12%	6%	19%		100%	
Company/ Business Trip	Count	5	1		1			4					
	Column N %	4%	1%		2%			5%					
Visit friends/ Relatives	Count	2	1	1				2					
	Column N %	2%	1%	2%				3%					
Organized sports	Count	1		1	1		1					1	
	Column N %	1%		2%	2%		2%					100%	
Total	Count	125	86	59	52		42	78	47		1	1	

INFORMATION SOURCES - SEGMENTATION

			TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
			-	-	-	-	-	-	-	-	-	-	-
Q1	Prior Trip	Count	99	74	47	43		35	61	40		1	
		Column N %	79%	86%	80%	83%		83%	78%	85%		100%	
	Internet	Count	96	67	46	39		37	56	39		1	1
		Column N %	77%	78%	78%	75%		88%	72%	83%		100%	100%
	Friend/ Relative	Count	65	42	28	24		22	39	25		1	1
		Column N %	52%	49%	47%	46%		52%	50%	53%		100%	100%
	Travel Agent Brochure	Count	9	3	3	8		6	3	3			1
		Column N %	7%	3%	5%	15%		14%	4%	6%			100%
	Other	Count	1						1				
		Column N %	1%						1%				
	Co-Worker/ Company Trvl Dept	Count	1			1			1				
		Column N %	1%			2%			1%				
	Magazine (Consumer)	Count	1						1				
		Column N %	1%						1%				
	Total	Count	125	86	59	52		42	78	47		1	1

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$1,524.36

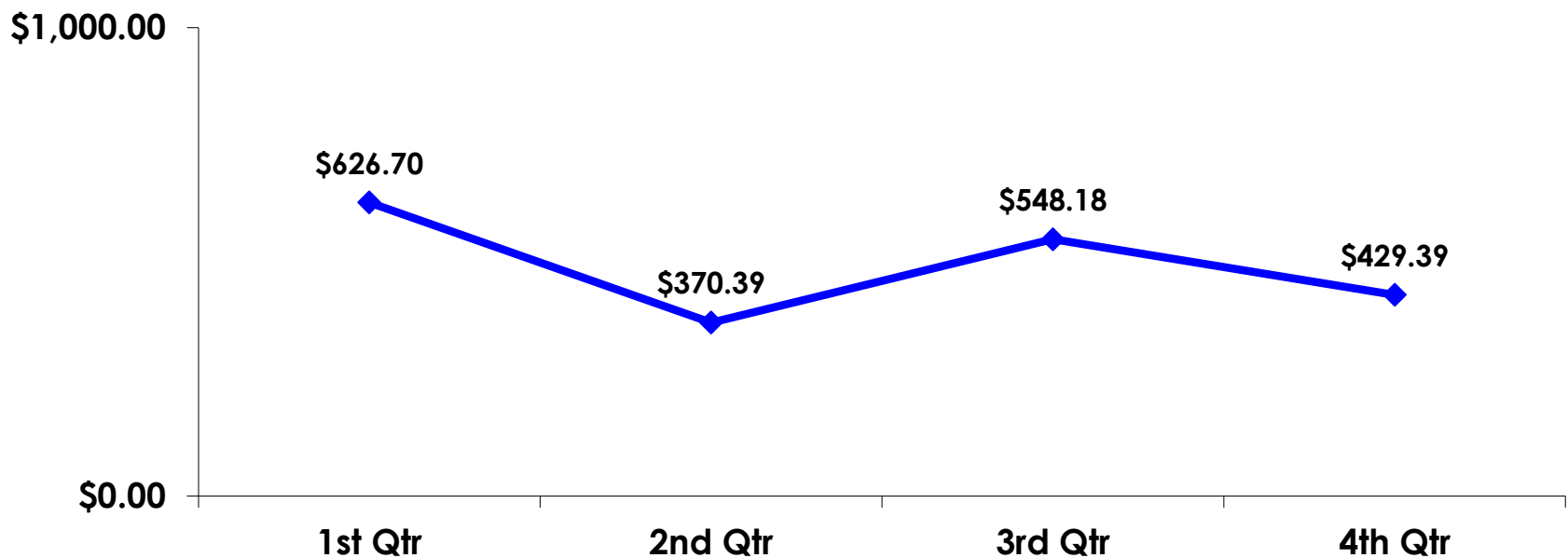
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
RUB\$	Mean	\$1,592.47	\$1,659.95	\$1,697.06	\$1,541.73	.	\$1,663.78	\$1,528.58	\$1,748.09	.	\$2,062.39	\$5,413.77
	Median	\$1,650	\$1,676	\$1,753	\$1,663	.	\$1,637	\$1,573	\$1,701	.	\$2,062	\$5,414

PREPAID EXPENSE- BREAKDOWN

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
AIR/ HOTEL	Mean	\$3,562.61	\$4,262.88	\$4,143.40	\$3,220.30	.	\$3,887.08	\$3,434.63	\$5,013.01	.	.	.
	Median	\$3,163.19	\$4,331.01	\$4,331.01	\$2,784.22	.	\$3,170.92	\$3,232.79	\$4,640.37	.	.	.
AIR/ HOTEL/ MEAL	Mean	\$5,495.29	\$5,652.82	\$5,421.50	\$5,512.20	.	\$5,768.24	\$5,308.30	\$5,856.71	.	\$6,187.16	\$5,413.77
AIR	Mean	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.
HOTEL	Mean	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.
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	\$3,393.66	\$4,250.98	\$4,014.84	\$2,776.19	.	\$3,499.06	\$3,302.60	\$5,087.95	.	\$6,187.16	\$5,413.77
	Median	\$3,402.94	\$4,640.37	\$4,640.37	\$2,474.86	.	\$3,170.92	\$3,480.28	\$5,259.09	.	\$6,187.16	\$5,413.77

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$514.77

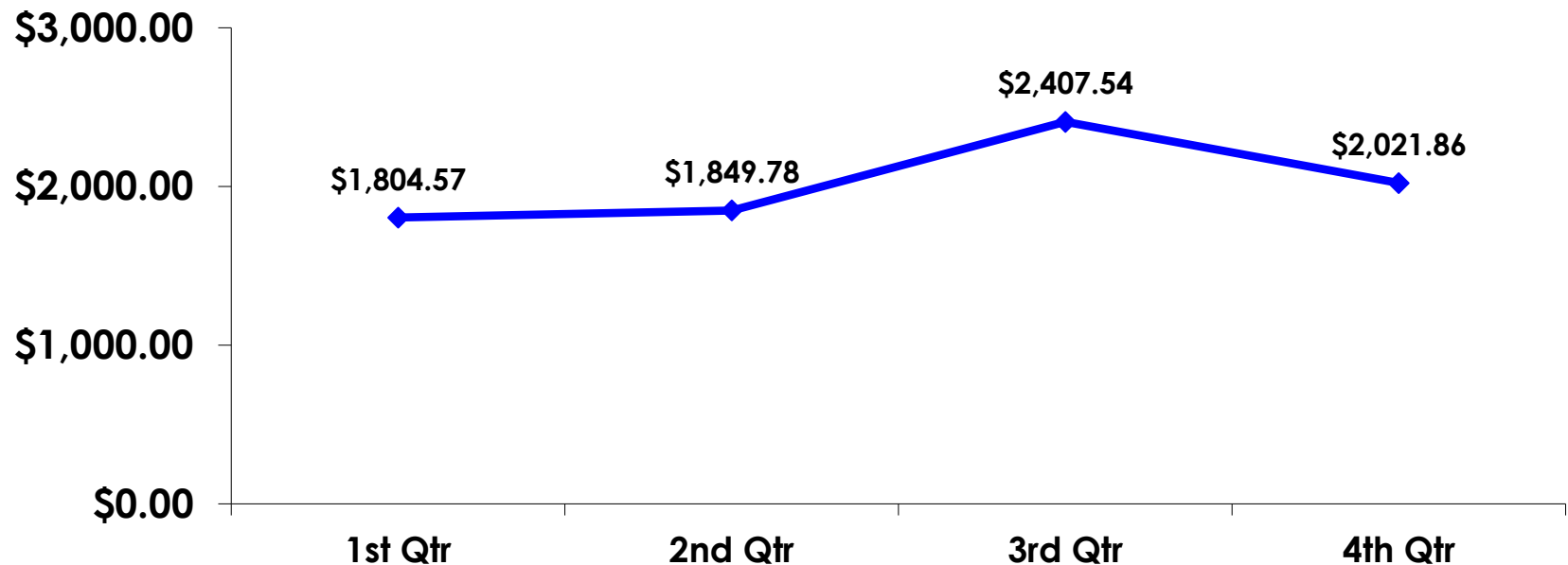
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
ONISLE	Mean	\$429.39	\$355.03	\$399.80	\$455.81	.	\$469.75	\$406.45	\$326.52	.	\$443.33	\$970.00
	Median	\$350	\$325	\$333	\$424	.	\$358	\$342	\$313	.	\$443	\$970

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$91.99	\$104.07	\$106.10	\$99.71	.	\$91.19	\$95.24	\$109.57	.	\$30.00	\$125.00
F&B FF/STORE	Mean	\$89.52	\$102.15	\$107.54	\$80.77	.	\$69.29	\$98.27	\$123.72	.	\$400.00	\$75.00
F&B RESTRNT	Mean	\$105.72	\$122.03	\$111.19	\$95.58	.	\$107.50	\$104.49	\$131.38	.	\$200.00	\$75.00
OPT TOUR	Mean	\$75.36	\$76.05	\$98.31	\$65.58	.	\$62.62	\$84.10	\$91.91	.	\$100.00	\$250.00
GIFT- SELF	Mean	\$193.40	\$184.24	\$187.37	\$190.19	.	\$221.67	\$180.06	\$208.19	.	\$200.00	\$200.00
GIFT- OTHER	Mean	\$55.92	\$53.14	\$53.98	\$56.15	.	\$67.62	\$47.56	\$52.98	.	\$200.00	\$25.00
TRANS	Mean	\$137.14	\$172.38	\$144.58	\$93.60	.	\$102.19	\$155.38	\$176.70	.	\$200.00	\$220.00
OTHER	Mean	\$29.00	\$33.95	\$32.03	\$32.12	.	\$33.81	\$25.71	\$37.23	.	\$0.00	\$0.00
TOTAL	Mean	\$778.05	\$848.02	\$841.10	\$713.69	.	\$755.88	\$790.82	\$931.70	.	\$1,330.00	\$970.00

TOTAL EXPENDITURES – TRACKING



YTD=\$2,020.60

TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	ADV TRAVELER	WIFE	MICE	18-35	36-55	CHILD	WEDDING/ HNY	SENIOR	SPORT COMP
		-	-	-	-	-	-	-	-	-	-	-
TOTPP	Mean	\$2,021.86	\$2,014.98	\$2,096.86	\$1,997.54	.	\$2,133.53	\$1,935.03	\$2,074.62	.	\$2,505.72	\$6,383.77
	Median	\$2,010	\$1,984	\$2,042	\$1,927	.	\$2,036	\$1,943	\$1,983	.	\$2,506	\$6,384

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 ($p \leq .05$) 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,4th Qtrs. and Overall 1-4 Qtrs. 2016					
	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Combined 1-4 Qtr 2016
Drivers:	rank	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%	0.0%	72.4%
NOTE: Only significant drivers are included.					

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Russian visitor's experience on Guam is driven by no significant factors in the Fourth Quarter 2016 Period

Comparison of Drivers of Per Person On-Island Expenditures, 1st,2nd,3rd,4th Qtrs. 2016, and Overall 1-4th Qtrs. 2016					
	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Combined 1-4 Qtr 2016
Drivers:	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks			2		
Ease of getting around					
Safety walking around at night			1		
Quality of daytime tours					
Variety of daytime tours	1				
Quality of nighttime tours					3
Variety of nighttime tours	2				4
Quality of shopping					
Variety of shopping					
Price of things on Guam					
Quality of hotel accommodations					1
Quality/cleanliness of air, sky				1	
Quality/cleanliness of parks					
Quality of landscape in Tumon	4				
Quality of landscape in Guam		1			2
Quality of ground handler				2	
Quality/cleanliness of transportation vehicles	3				
% of Per Person On Island Expenditures Accounted For	34.8%	16.0%	22.5%	45.4%	22.2%
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 two significant factors in the Fourth Quarter 2016 Period. By rank order they are:
 - **Quality/cleanliness of air/sky, and**
 - **Quality of ground handler.**
- With these factors, the overall r^2 is .454 meaning that **45.4% of per person on island expenditure is accounted for by these factors.**