



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2014 Market Segmentation

### DECEMBER 2013



**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 Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **350** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **350** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Japanese 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 +/- 5.23 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
    - OL's/ salary women
    - Group travelers
    - Silvers
    - Wedding participants
    - Sports activities/spectators
    - 18-35
    - 36-55
    - Traveling with children
    - Honeymooners
    - Repeat visitors
  - To identify (for all Japanese 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

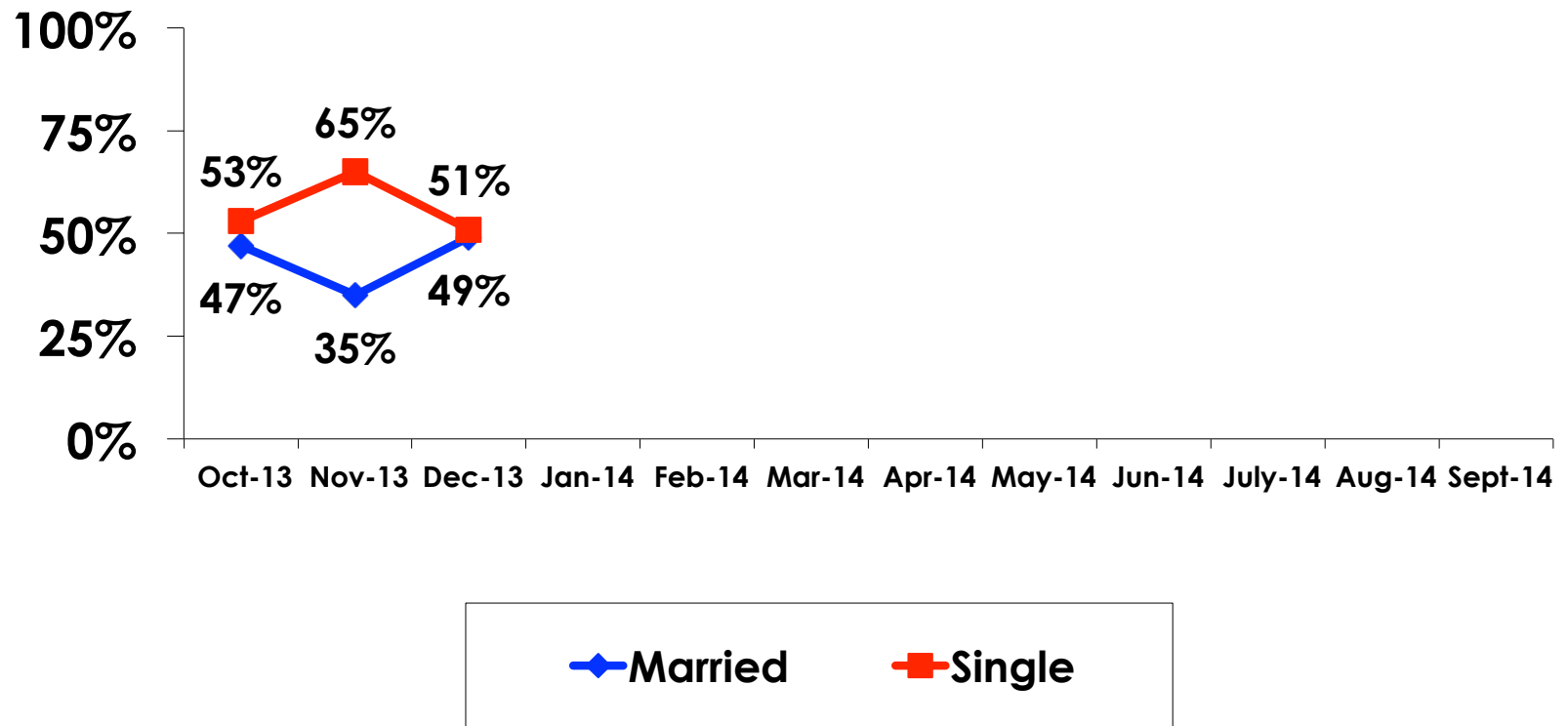
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

# Highlighted Segments

	Oct 13	Nov 13	Dec 13	Jan 14	Feb 14	Mar 14	Apr 14	May 14	Jun 14	July 14	Aug 14	Sept 14
Families	39%	30%	45%									
Office Lady	13%	12%	10%									
Group	6%	5%	4%									
Silver	2%	2%	4%									
Wedding	8%	6%	4%									
Sport	35%	40%	42%									
18-35	64%	71%	61%									
36-55	29%	24%	32%									
Child	15%	9%	22%									
Honeymoon	4%	3%	5%									
Repeat	48%	43%	50%									
<b>TOTAL</b>	<b>351</b>	<b>350</b>	<b>350</b>									

# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status Tracking

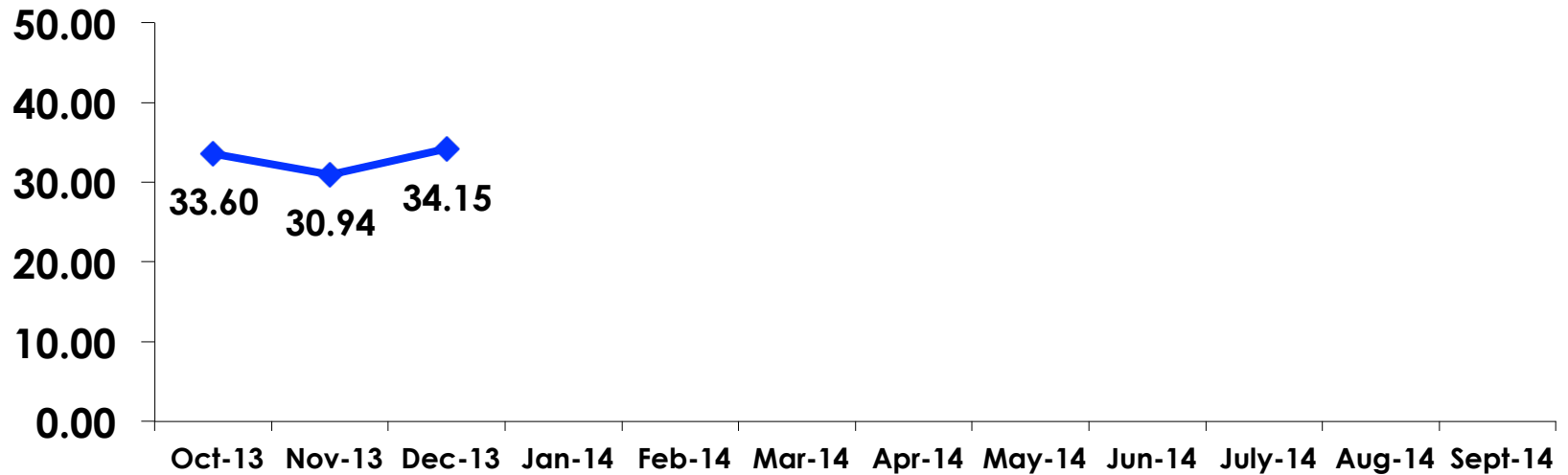


# Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	49%	91%	21%	20%	93%	93%	43%	27%	83%	94%	100%	63%
	Single	51%	9%	79%	80%	7%	7%	57%	73%	17%	6%		37%
	Total Count	348	157	33	15	15	14	148	211	112	77	19	171



# Average Age Tracking



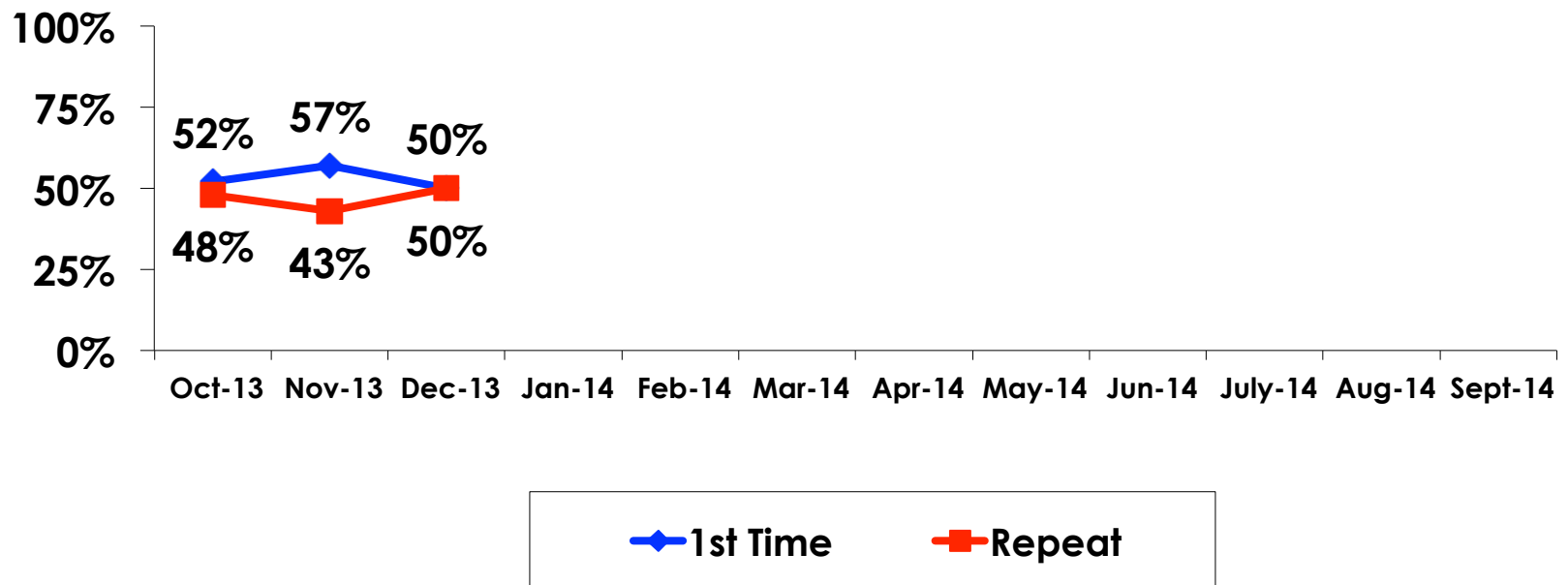
# Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	22%	7%	11%	27%		7%	25%	36%			11%	13%
	25-34	37%	22%	60%	33%		29%	46%	59%		12%	74%	29%
	35-49	32%	55%	26%	40%		29%	23%	5%	88%	82%	16%	44%
	50+	10%	15%	3%		100%	36%	7%		13%	7%		15%
	Total Count	345	155	35	15	15	14	145	213	112	76	19	172
QF	Mean	34.15	40.38	31.26	32.87	65.40	42.21	31.78	26.60	43.31	41.09	29.53	38.40
	Median	31	40	30	30	65	40	28	27	43	41	29	39

# Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	6%	2%	3%	7%	7%		4%	9%	1%	1%	6%	5%
	Y2.0M-Y3.0M	14%	9%	26%	43%	40%	23%	22%	18%	4%	1%	18%	10%
	Y3.0M-Y4.0M	13%	9%	21%	14%		23%	15%	17%	6%	9%	24%	11%
	Y4.0M-Y5.0M	17%	16%	18%	29%		38%	15%	16%	21%	16%	24%	13%
	Y5.0M-Y7.0M	20%	21%	15%	7%	33%	8%	18%	17%	21%	20%	24%	23%
	Y7.0M-Y10.0M	15%	24%	6%		13%	8%	15%	10%	24%	30%	6%	19%
	Y10.0M+	12%	17%	12%		7%		11%	8%	22%	21%		16%
	No Income	2%	1%					1%	3%		1%		3%
	Total Count	305	145	34	14	15	13	131	184	99	70	17	158

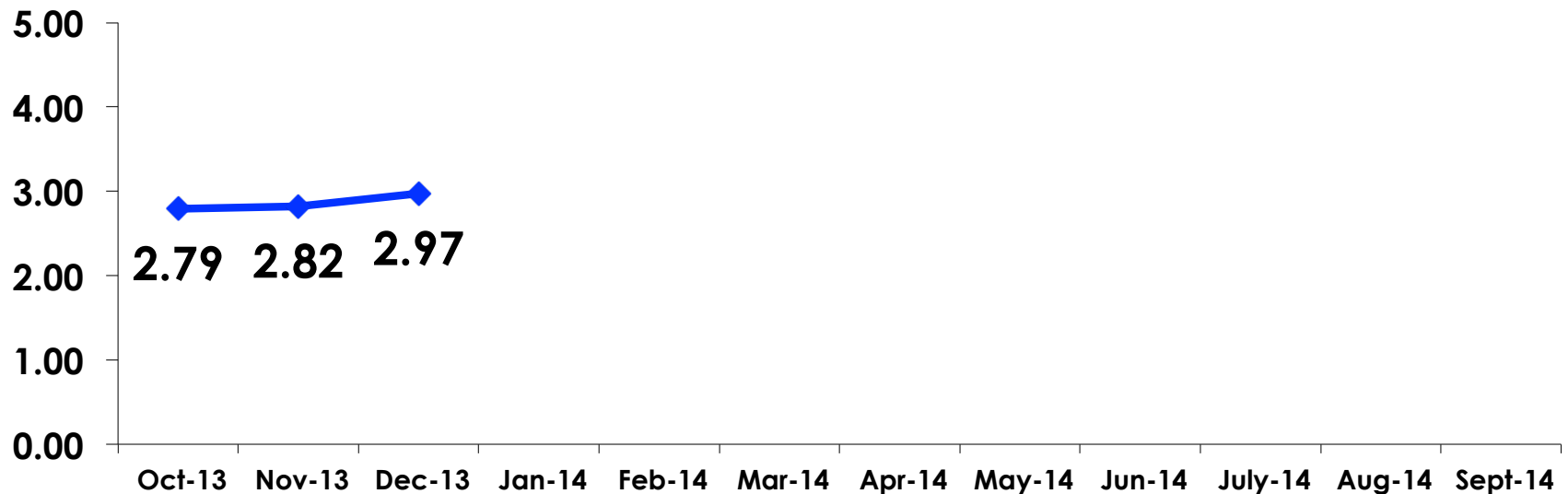
# Prior Trips tp Guam Tracking



# Prior Trips to Guam Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	50%	37%	46%	36%	13%	62%	55%	64%	28%	25%	84%	
	No	50%	63%	54%	64%	87%	38%	45%	36%	72%	75%	16%	100%
	Total Count	349	156	35	14	15	13	148	213	111	76	19	173

# Average Length of Stay Tracking



# Average Length of Stay Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q8	Mean	2.97	3.35	2.71	3.27	4.00	2.93	3.00	2.77	3.20	3.39	3.42	3.19
	Median	3	3	3	3	3	3	3	3	3	3	3	3

# SECTION 2 **TRAVEL PLANNING**



# Travel Planning Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q7	Free-time package tour	58%	54%	53%		43%	46%	59%	60%	57%	57%	37%	57%
	Full package tour	21%	24%	6%		14%	38%	23%	23%	17%	20%	63%	17%
	Individually arranged travel (FIT)	11%	18%	9%		29%	8%	8%	8%	15%	20%		16%
	Group tour	4%	3%	18%	100%		8%	5%	5%	5%	3%		5%
	Company paid travel	4%	1%	15%				3%	4%	5%			4%
	Other	1%	1%			14%		1%	0%	1%			1%
	Total Count	342	153	34	15	14	13	147	208	110	75	19	169

# Travel Motivation Segmentation

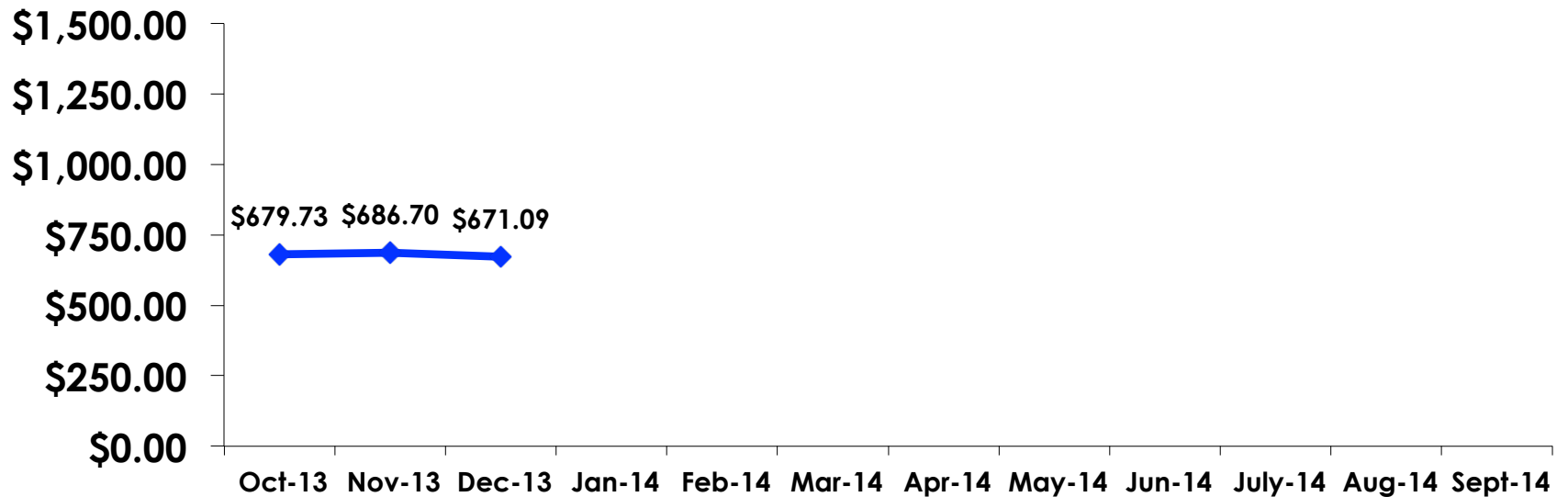
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	39%	48%	47%	57%	80%	29%	36%	27%	58%	57%	5%	80%
	Price	26%	28%	21%	7%	7%		34%	26%	27%	29%	26%	26%
	Visit friends/ Relatives	3%	1%	3%		7%		4%	3%	2%			2%
	Recomm- friend/family/trvl agnt	17%	9%	15%		13%		18%	22%	7%	8%	11%	8%
	Scuba	8%	3%			7%		13%	10%	4%	4%		8%
	Water sports	26%	18%	26%	7%	7%	7%	41%	32%	19%	25%	16%	24%
	Short travel time	48%	52%	41%	21%	47%	21%	52%	46%	54%	56%	47%	54%
	Golf	4%	5%			20%		7%	3%	3%	1%	5%	6%
	Relax	38%	39%	29%	7%	33%	7%	38%	36%	39%	44%	11%	35%
	Company/ Business Trip	9%	1%	29%	43%			8%	10%	9%			11%
	Company Sponsored	1%		3%	7%			1%	1%				1%
	Safe	22%	27%	9%	7%	33%	7%	20%	17%	27%	30%	21%	26%
	Natural beauty	61%	61%	47%	21%	53%	14%	66%	61%	63%	70%	53%	59%
	Shopping	38%	33%	32%	21%	20%	7%	36%	42%	31%	29%	26%	40%
	Married/ Attn wedding	4%	8%		7%	13%	100%	2%	2%	5%	4%	16%	3%
	Honeymoon	5%	12%				21%	6%	8%	2%	1%	100%	2%
	Pleasure	52%	50%	29%	21%	47%	21%	57%	55%	47%	57%	26%	49%
	Organized sports	2%	3%					3%	1%	4%	3%		3%
	Other	2%	3%	3%	7%			3%	1%	4%	3%		1%
	Total	Count	349	157	34	14	15	14	148	212	112	77	19

# Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q1	Internet	76%	76%	69%	47%	47%	62%	78%	79%	76%	80%	79%	74%
	Travel Guidebook- Bookstore	50%	47%	51%	53%	27%	23%	52%	52%	48%	49%	63%	42%
	Prior Trip	46%	60%	51%	47%	80%	38%	41%	31%	69%	72%	16%	92%
	Travel Agent Brochure	45%	43%	29%	33%	33%	46%	48%	49%	40%	41%	63%	38%
	Magazine (Consumer)	38%	34%	23%	33%	33%	38%	36%	40%	34%	36%	37%	35%
	Friend/ Relative	32%	22%	37%	13%	40%	38%	38%	40%	17%	17%	21%	21%
	TV	13%	12%	14%		7%	8%	16%	13%	14%	12%	16%	10%
	Co-Worker/ Company Trvl Dept	3%	1%	3%	13%			4%	4%	3%	3%		2%
	Consumer Trvl Show	2%	1%	3%				2%	2%	2%	1%		1%
	Newspaper	1%	1%			7%	8%	1%	1%	1%			1%
	Travel Trade Show	1%							1%				1%
	GVB Office	1%							1%				
	GVB Promo	1%	1%						0%	1%	1%		1%
	Other	0%						1%	0%				
	Theater Ad	0%							0%				
	Radio	0%	1%						0%				
	Total	Count	348	156	35	15	13	147	213	111	76	19	172

# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures Tracking

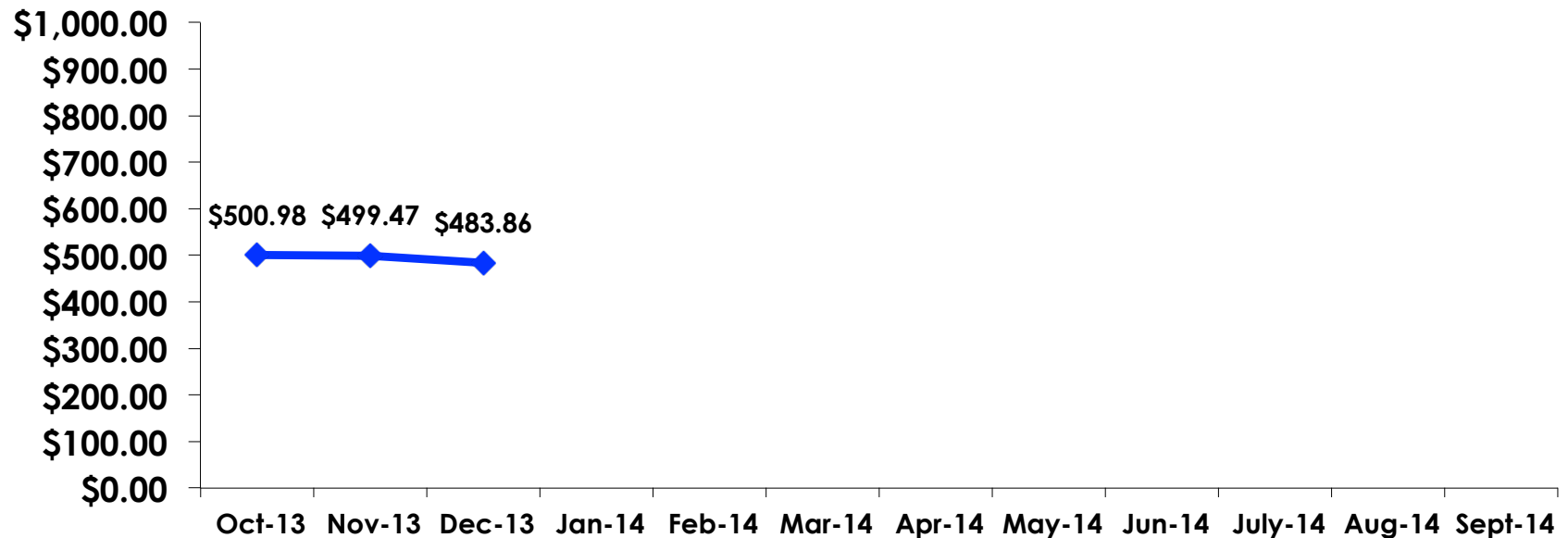


YTD=\$679.18

# Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$671.09	\$793.78	\$506.94	\$355.60	\$578.00	\$953.94	\$669.21	\$657.26	\$706.62	\$794.26	\$1,186.13	\$623.63
	Median	\$676	\$724	\$579	\$0	\$579	\$772	\$642	\$656	\$676	\$792	\$1,207	\$628
	Minimum	\$0	\$0	\$0	\$0	\$0	\$531	\$0	\$0	\$0	\$0	\$483	\$0
	Maximum	\$1,989	\$1,989	\$1,400	\$1,207	\$1,448	\$1,931	\$1,989	\$1,931	\$1,989	\$1,690	\$1,989	\$1,931

# On-Island Expenditures Tracking



YTD = \$494.78

# On-Island Expenditures Per Person Segmentation

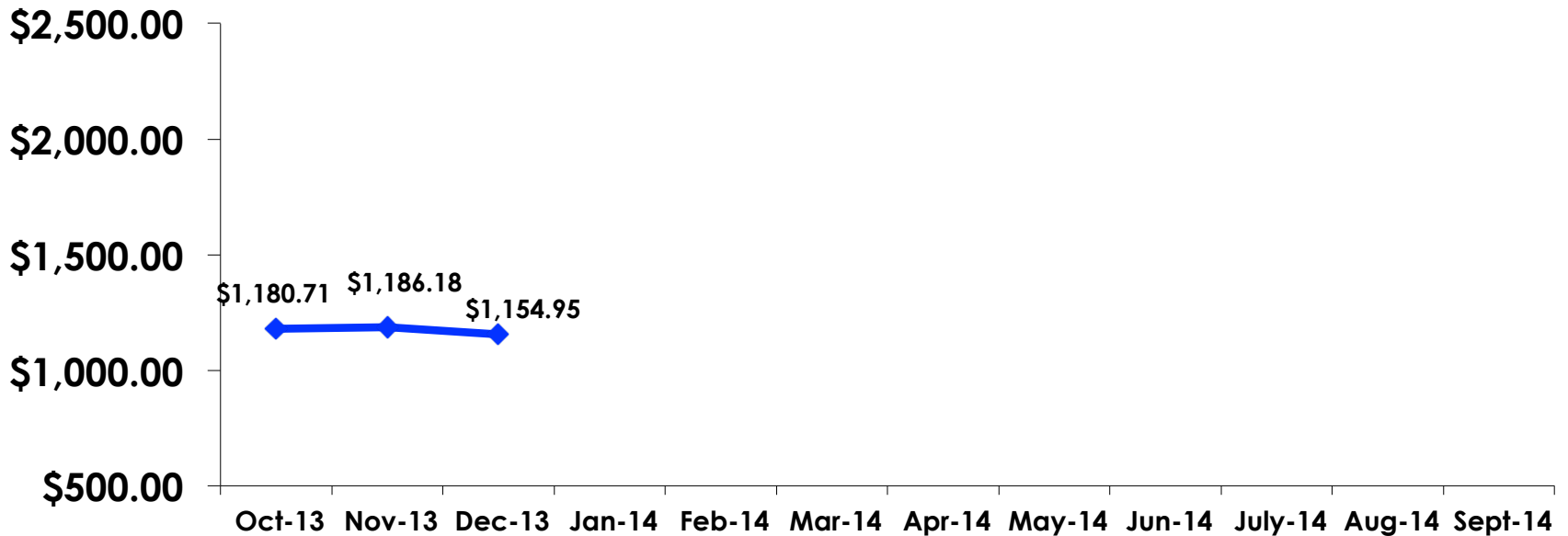
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$483.86	\$421.41	\$451.20	\$436.13	\$387.24	\$349.29	\$543.67	\$509.66	\$460.54	\$348.29	\$437.89	\$486.60
	Median	\$400	\$300	\$407	\$300	\$250	\$313	\$500	\$450	\$333	\$250	\$400	\$400
	Minimum	\$0	\$0	\$0	\$0	\$0	\$70	\$0	\$0	\$0	\$0	\$50	\$0
	Maximum	\$5,000	\$3,500	\$1,000	\$3,000	\$1,050	\$900	\$5,000	\$5,000	\$3,000	\$1,345	\$1,010	\$5,000



# On-Island Expense Breakdown

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$35.51	\$47.78	\$39.66	\$18.00	\$54.00	\$52.71	\$37.82	\$27.08	\$50.23	\$63.74	\$6.84	\$47.77
	Median	\$0	\$0	\$0	\$0	\$0	\$5	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$43.19	\$56.04	\$19.43	\$38.60	\$32.93	\$16.29	\$45.85	\$37.19	\$58.29	\$54.08	\$71.58	\$44.61
	Median	\$3	\$10	\$2	\$0	\$4	\$14	\$10	\$0	\$20	\$0	\$0	\$0
F&B RESTRNT	Mean	\$80.99	\$101.94	\$45.71	\$55.80	\$92.00	\$69.29	\$85.62	\$74.62	\$97.63	\$108.01	\$46.32	\$85.16
	Median	\$10	\$40	\$10	\$0	\$0	\$0	\$32	\$10	\$28	\$30	\$0	\$0
OPT TOUR	Mean	\$74.06	\$80.78	\$39.51	\$28.67	\$69.73	\$70.71	\$104.52	\$64.92	\$92.25	\$76.64	\$53.68	\$83.03
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$13	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$211.19	\$268.19	\$140.86	\$198.67	\$56.47	\$102.86	\$218.88	\$198.46	\$269.81	\$250.64	\$152.63	\$270.35
	Median	\$35	\$50	\$60	\$0	\$0	\$0	\$50	\$40	\$50	\$50	\$0	\$50
GIFT- OTHER	Mean	\$134.57	\$164.63	\$105.71	\$220.67	\$224.00	\$145.00	\$147.93	\$122.29	\$149.57	\$104.44	\$185.26	\$145.50
	Median	\$50	\$80	\$60	\$60	\$100	\$125	\$85	\$50	\$100	\$0	\$80	\$50
TRANS	Mean	\$23.50	\$37.61	\$14.26	\$8.00	\$35.13	\$8.71	\$21.50	\$21.40	\$27.97	\$27.47	\$0.00	\$26.60
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$233.31	\$358.15	\$138.31	\$152.73	\$200.67	\$293.71	\$202.21	\$163.64	\$367.96	\$497.90	\$355.79	\$270.35
	Median	\$0	\$0	\$0	\$0	\$0	\$135	\$0	\$0	\$0	\$0	\$100	\$0
TOTAL	Mean	\$837.80	\$1,114.89	\$543.46	\$721.13	\$764.93	\$759.29	\$867.86	\$712.15	\$1,113.47	\$1,182.56	\$872.11	\$973.40
	Median	\$600	\$820	\$465	\$300	\$500	\$650	\$625	\$520	\$830	\$900	\$800	\$648

# Total Expenditures Tracking



YTD=\$1,173.95

# Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$1,154.95	\$1,215.18	\$958.14	\$791.74	\$965.24	\$1,303.23	\$1,212.89	\$1,166.92	\$1,167.16	\$1,142.55	\$1,624.03	\$1,110.23
	Median	\$1,090	\$1,098	\$949	\$407	\$976	\$1,164	\$1,096	\$1,079	\$1,105	\$1,096	\$1,592	\$1,078
	Minimum	\$0	\$0	\$100	\$0	\$0	\$656	\$0	\$0	\$0	\$0	\$726	\$0
	Maximum	\$5,483	\$4,207	\$2,062	\$4,207	\$2,303	\$2,431	\$5,483	\$5,483	\$4,207	\$2,578	\$2,831	\$5,483

# 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 ( $p \leq .05$ ) 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, Oct, Nov, Dec 2013, and Overall Oct-Dec 2013**

Drivers:	Oct-13	Nov-13	<b>Dec-13</b>	Combin ed Oct- Dec 2013
	rank	rank	<b>rank</b>	rank
Quality & Cleanliness of beaches & parks			<b>3</b>	5
Ease of getting around				
Safety walking around at night				
Quality of daytime tours	2			
Variety of daytime tours				3
Quality of nighttime tours				8
Variety of nighttime tours				
Quality of shopping	4		<b>5</b>	4
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations			<b>2</b>	
Quality/cleanliness of air, sky	3	4		7
Quality/cleanliness of parks				
Quality of landscape in Tumon	1	2		1
Quality of landscape in Guam			<b>1</b>	
Quality of ground handler		1		2
Quality/cleanliness of transportation vehicles		3	<b>4</b>	6
% of Per Person On Island Expenditures Accounted For	45.2%	41.7%	<b>47.4%</b>	44.7%

NOTE: Only significant drivers are included.

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# Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by five significant factors in the December 2014 Period. By rank order they are:
  - **Quality of landscape in Guam,**
  - **Quality of hotel accommodations,**
  - **Quality & cleanliness of beaches & parks,**
  - **Quality & cleanliness of transportation vehicles, and**
  - **Quality of shopping.**
- With all five factors the overall  $r^2$  is .474 meaning that **47.4% of overall satisfaction is accounted for by these factors**

**Drivers of Per Person On Island Expenditures, Oct ,Nov, Dec 2013 and Overall Oct-Dec 2013**

Drivers:	Oct-13	Nov-13	<b>Dec-13</b>	Combin ed Oct- Dec 2013
	rank	rank	<b>rank</b>	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				
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				
Quality of landscape in Guam				
Quality of ground handler				
Quality/cleanliness of transportation vehicles				
% of Per Person On Island Expenditures Accounted For	0.0%	0.0%	<b>0.0%</b>	0.0%
NOTE: Only significant drivers are included.				



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# Drivers of Per Person On-Island Expenditure

- **Per Person On Island Expenditure** of Japanese visitors on Guam is driven by no significant factor in the December 2013 Period.