



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2015 Market Segmentation

### FEBRUARY 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 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

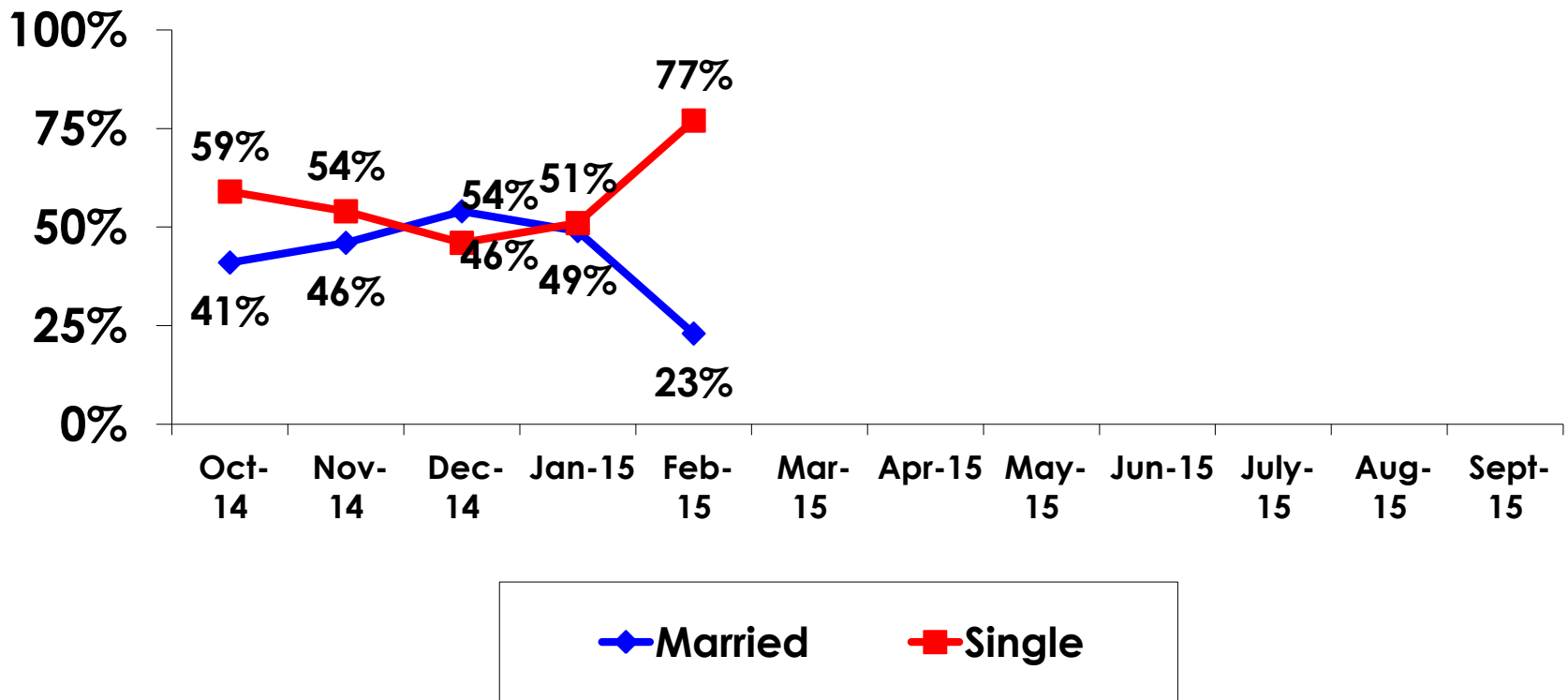
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

# Highlighted Segments

	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	July 15	Aug 15	Sept 15
<b>Families</b>	36%	39%	59%	46%	23%							
<b>Office Lady</b>	13%	11%	10%	12%	8%							
<b>Group</b>	5%	3%	1%	4%	5%							
<b>Silver</b>	2%	5%	3%	5%	3%							
<b>Wedding</b>	9%	6%	0%	3%	2%							
<b>Sport</b>	32%	29%	35%	27%	33%							
<b>18-35</b>	71%	63%	48%	56%	83%							
<b>36-55</b>	25%	29%	46%	36%	13%							
<b>Child</b>	11%	12%	35%	19%	7%							
<b>Honey-moon</b>	4%	5%	3%	4%	4%							
<b>Repeat</b>	43%	43%	51%	50%	34%							
<b>TOTAL</b>	<b>351</b>	<b>350</b>	<b>351</b>	<b>350</b>	<b>350</b>							

# SECTION 1 **PROFILE OF RESPONDENTS**

# MARITAL STATUS - TRACKING

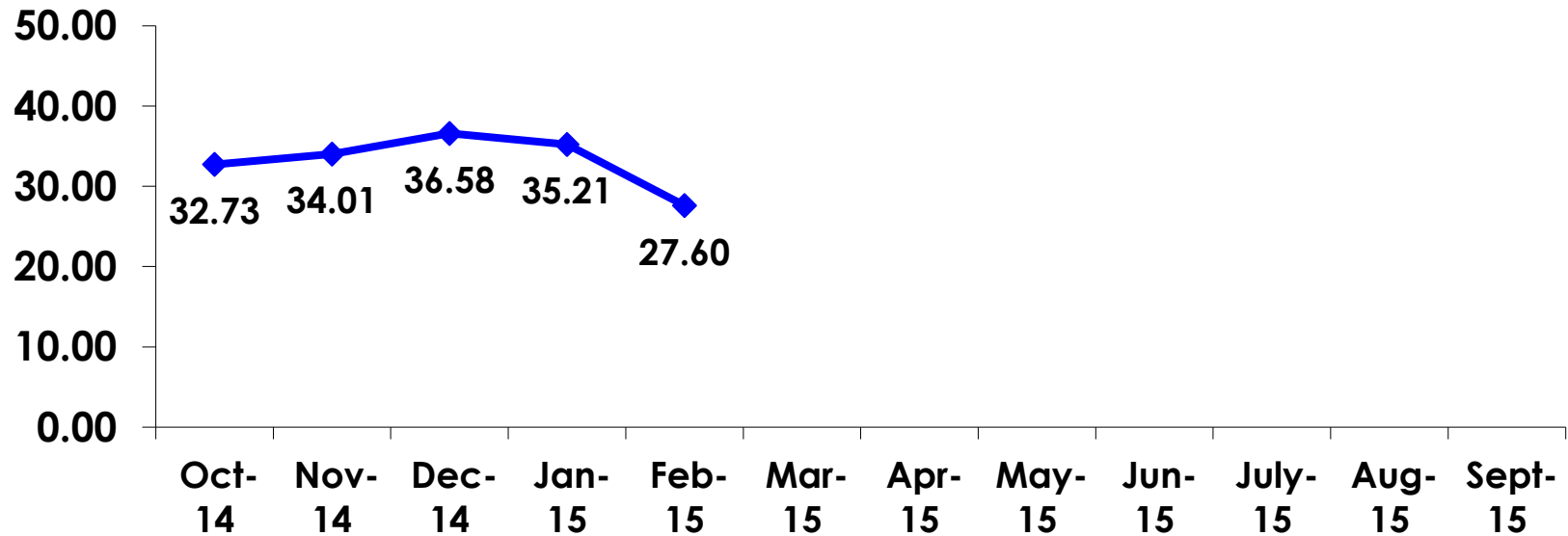


# MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	23%	84%	14%	22%	100%	75%	17%	11%	78%	100%	93%	41%
	Single	77%	16%	86%	78%		25%	83%	89%	22%		7%	59%
	Total Count	346	80	29	18	9	8	117	285	46	24	15	119



# AVERAGE AGE - TRACKING



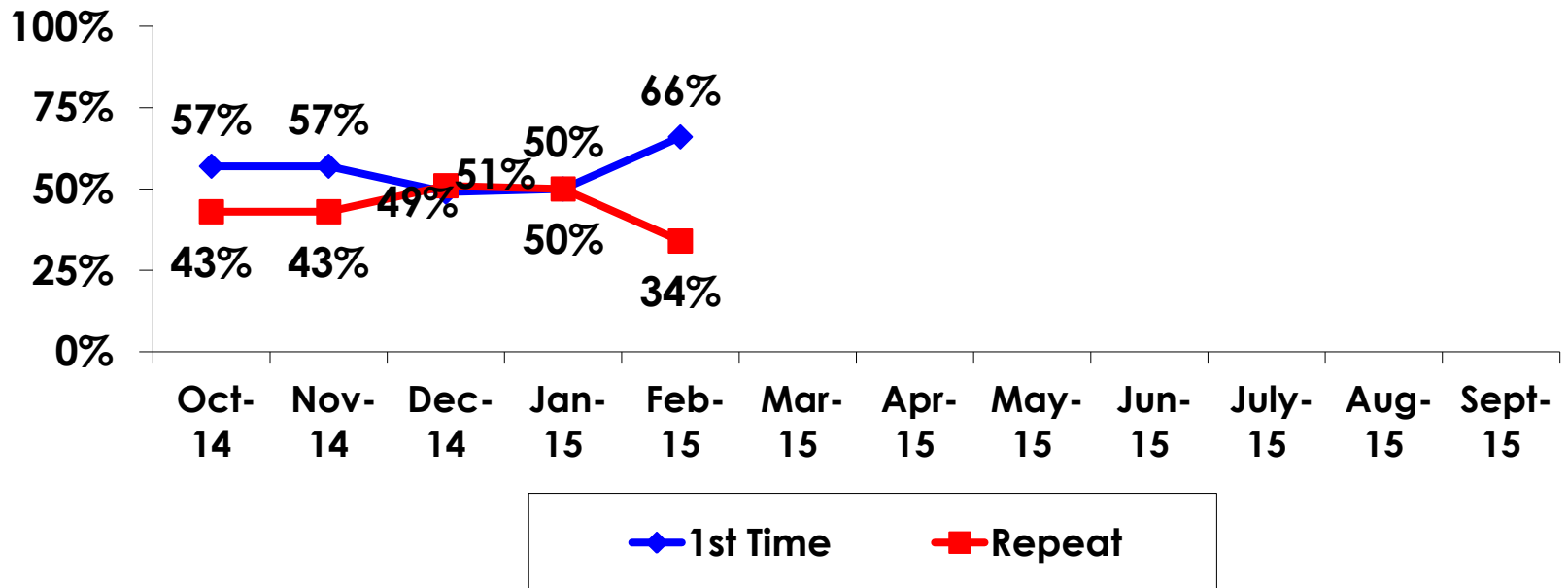
# AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	61%	15%	28%	61%		13%	69%	74%			13%	37%
	25-34	20%	31%	48%			38%	18%	25%		17%	67%	27%
	35-49	11%	30%	17%	28%		38%	8%	2%	74%	63%	20%	22%
	50+	7%	24%	7%	11%	100%	13%	5%		26%	21%		15%
	Total Count	349	80	29	18	9	8	116	289	46	24	15	120
QF	Mean	27.60	38.20	29.83	30.94	63.00	35.63	25.80	23.39	43.80	41.50	29.07	32.77
	Median	23	36	28	23	63	35	22	22	42	40	27	29

# INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q26	<Y2.0 million	7%	1%	7%	25%			10%	8%				3%	
	Y2.0M-Y3.0M	12%	8%	14%		22%		11%	12%	10%		7%	11%	
	Y3.0M-Y4.0M	12%	5%	36%	38%		40%	10%	14%	7%	4%	14%	13%	
	Y4.0M-Y5.0M	15%	21%	7%	6%	22%	20%	11%	16%	10%	17%	36%	18%	
	Y5.0M-Y7.0M	19%	24%	18%	19%	22%		20%	19%	19%	17%	29%	17%	
	Y7.0M-Y10.0M	12%	17%	11%		11%	20%	13%	10%	29%	35%	7%	19%	
	Y10.0M+	16%	21%	7%	6%	22%	20%	19%	13%	24%	26%	7%	18%	
	No Income	6%	1%		6%			5%	8%	2%				
	Total	Count	281	75	28	16	9	5	99	225	42	23	14	104

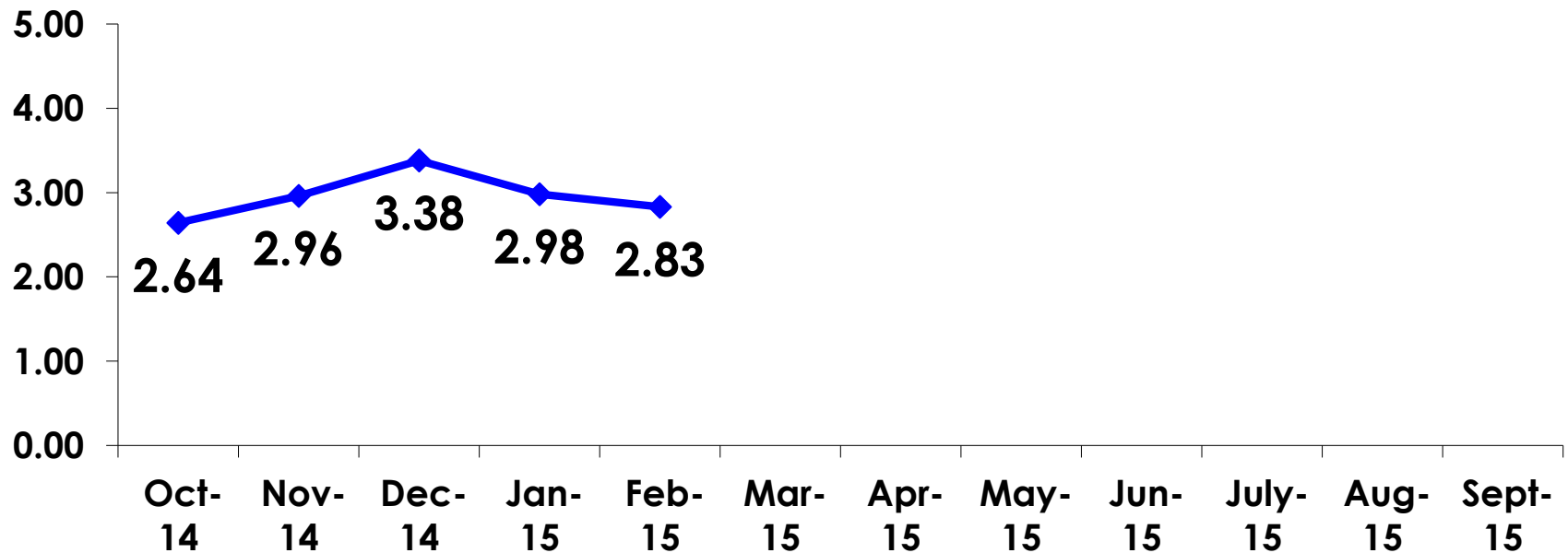
# PRIOR TRIPS TO GUAM - TRACKING



# PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	66%	46%	38%	56%	33%	38%	72%	72%	35%	21%	80%	
	No	34%	54%	62%	44%	67%	63%	28%	28%	65%	79%	20%	100%
	Total Count	350	80	29	18	9	8	117	289	46	24	15	120

# AVG LENGTH OF STAY - TRACKING



# AVG LENGTH OF STAY - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q8	Mean	2.83	3.08	2.86	2.78	3.00	3.63	2.89	2.77	3.11	3.42	3.60	2.84
	Median	3	3	3	3	3	3	3	3	3	3	4	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	64%	64%	66%		44%	57%	68%	67%	51%	58%	67%	58%	
	Full package tour	22%	18%	10%		22%	29%	22%	22%	20%	8%	27%	19%	
	Group tour	5%	4%	10%	100%	11%	14%	6%	4%	11%	4%		7%	
	Individually arranged travel (FIT)	5%	13%			11%		3%	4%	16%	29%		10%	
	Company paid travel	4%	1%	14%		11%		1%	3%	2%		7%	6%	
	Total	Count	338	78	29	18	9	7	115	278	45	24	15	118

# TRAVEL MOTIVATION - SEGMENTATION

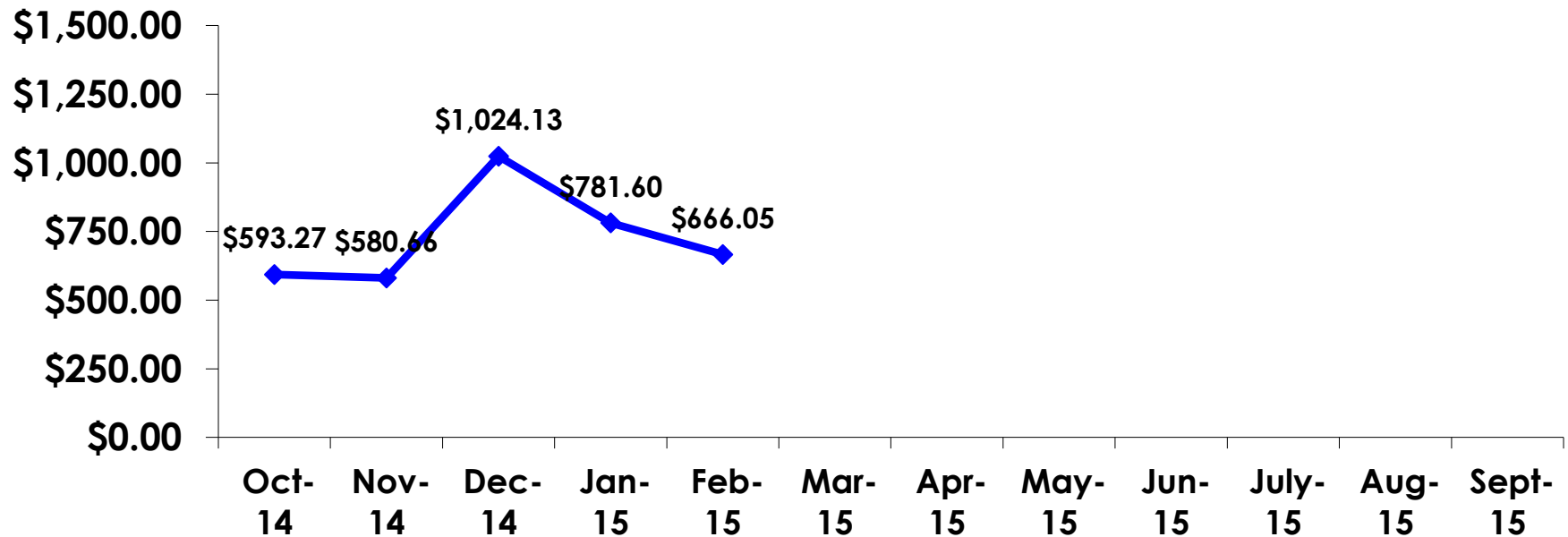
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	28%	49%	62%	22%	67%	25%	22%	21%	57%	67%	20%	80%
	Price	24%	21%	17%	11%			32%	25%	26%	29%	20%	18%
	Visit friends/ Relatives	3%						2%	3%				3%
	Recomm- friend/family/trvl agnt	26%	8%	14%	22%	11%		28%	30%	4%	8%	7%	13%
	Scuba	2%	3%	3%			13%	3%	3%			7%	2%
	Water sports	23%	15%	14%	17%	22%		39%	26%	9%	8%	13%	18%
	Short travel time	45%	65%	55%	6%	67%	25%	47%	42%	59%	75%	67%	49%
	Golf	2%	4%	3%		22%		4%	1%	7%	4%		3%
	Relax	34%	41%	45%	22%	22%		36%	33%	41%	42%	20%	37%
	Company/ Business Trip	11%	6%	31%	56%	11%	25%	5%	10%	20%	4%	7%	21%
	Company Sponsored	1%		3%					1%				2%
	Safe	22%	30%	28%	17%	22%		28%	21%	35%	38%		23%
	Natural beauty	66%	66%	55%	39%	78%	13%	73%	66%	63%	67%	40%	60%
	Shopping	30%	23%	38%	11%	33%	13%	31%	32%	20%	25%	7%	28%
	Married/ Attn wedding	2%	4%		6%	11%	100%	1%	1%	7%	4%	20%	4%
	Honeymoon	4%	16%	3%			38%	5%	4%	7%	4%	100%	3%
	Pleasure	55%	49%	41%	28%	22%	38%	60%	58%	43%	54%	40%	45%
	Organized sports	0%						1%	0%				
	Other	5%	3%		6%	11%		6%	5%	4%			1%
	Total Count	349	80	29	18	9	8	116	288	46	24	15	120

# INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	82%	78%	90%	50%	56%	71%	84%	83%	84%	83%	80%	81%	
	Travel Guidebook- Bookstore	49%	55%	38%	38%	44%	71%	46%	48%	56%	54%	60%	46%	
	Travel Agent Brochure	46%	46%	31%	31%	56%	57%	50%	45%	44%	42%	73%	33%	
	Magazine (Consumer)	38%	30%	21%	13%	33%	14%	45%	40%	24%	33%	40%	31%	
	Friend/ Relative	34%	14%	28%	25%	22%	29%	32%	39%	11%	4%	20%	19%	
	Prior Trip	27%	49%	62%	31%	67%	43%	22%	21%	58%	75%	20%	81%	
	TV	14%	10%	24%	13%	22%		16%	15%	7%	8%	7%	11%	
	Consumer Trvl Show	3%			6%			2%	3%				2%	
	Co-Worker/ Company Trvl Dept	2%	3%		13%	11%			1%	7%	4%		3%	
	GVB Office	1%	3%	3%		11%			0%	2%			3%	
	Newspaper	1%	1%		6%				0%	4%	4%			
	Other	1%						1%	1%					
	Theater Ad	1%							1%					
	Radio	1%						1%	1%					
	GVB Promo	0%								2%			1%	
	Total	Count	348	80	29	16	9	7	117	288	45	24	15	118

# SECTION 3 **EXPENDITURES**

# PREPAID EXPENDITURES - TRACKING

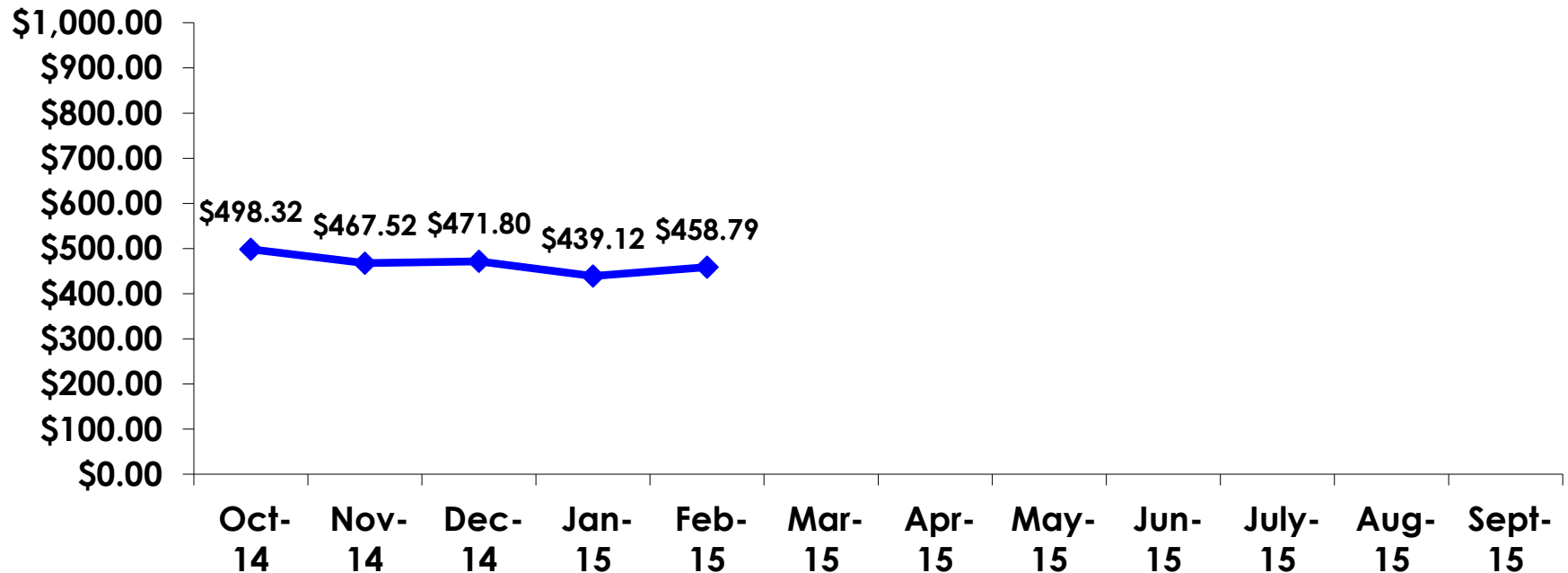


YTD=\$729.91

# 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	\$666.05	\$856.95	\$626.76	\$525.87	\$1,021.95	\$717.85	\$713.36	\$649.60	\$700.25	\$789.75	\$1,278.39	\$649.10
	Median	\$623	\$788	\$649	\$581	\$1,095	\$569	\$632	\$590	\$758	\$800	\$1,179	\$632
	Minimum	\$0	\$0	\$0	\$0	\$394	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$2,949	\$2,949	\$1,264	\$1,685	\$1,685	\$2,106	\$2,106	\$2,949	\$1,474	\$1,404	\$2,949	\$2,106

# ON-ISLAND EXPENDITURES - TRACKING



YTD = \$467.11

# ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

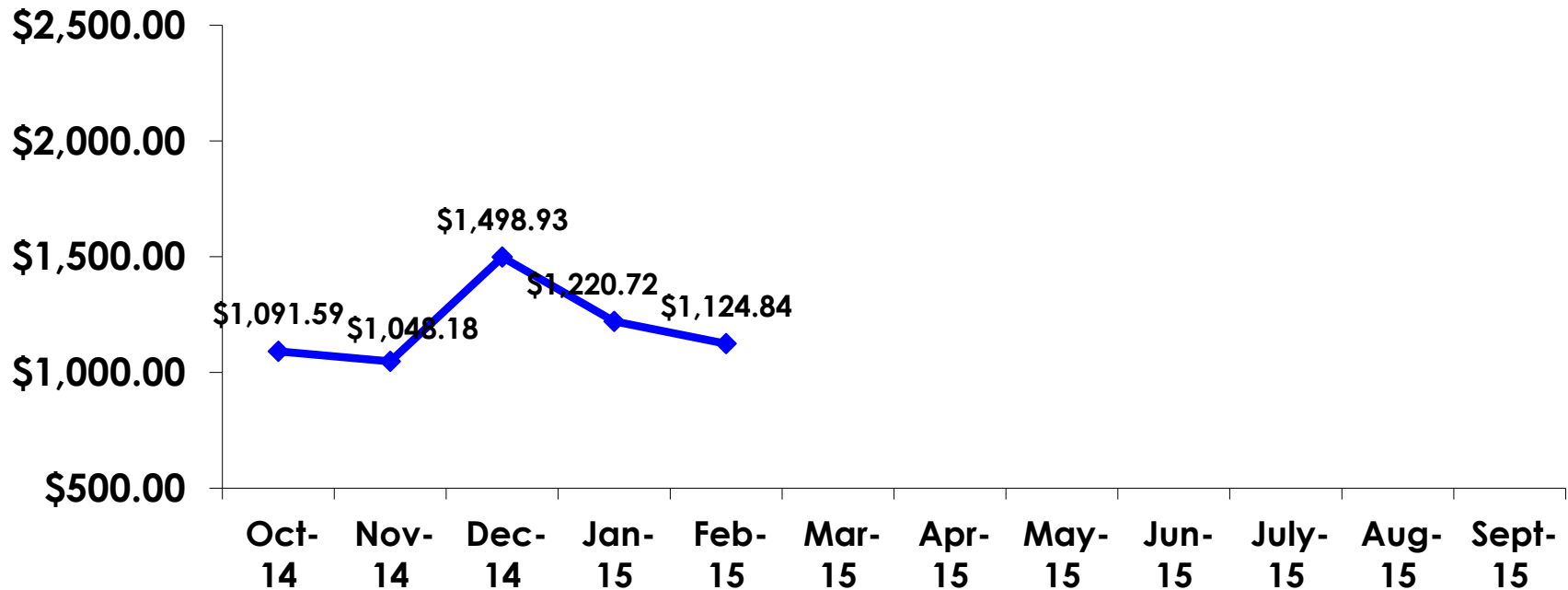
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$458.79	\$399.37	\$580.93	\$450.78	\$1,388.15	\$406.25	\$490.91	\$435.81	\$386.15	\$334.72	\$596.87	\$486.86
	Median	\$400	\$350	\$570	\$346	\$500	\$425	\$400	\$400	\$296	\$250	\$550	\$400
	Minimum	\$0	\$0	\$170	\$0	\$80	\$0	\$0	\$0	\$0	\$0	\$272	\$0
	Maximum	\$6,330	\$1,500	\$2,000	\$1,500	\$6,330	\$1,000	\$3,000	\$3,000	\$1,300	\$1,083	\$1,000	\$3,000



# 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	\$26.80	\$54.90	\$17.24	\$49.83	\$116.67	\$37.50	\$28.43	\$18.85	\$58.30	\$59.17	\$41.33	\$40.87
	Median	\$0	\$0	\$0	\$0	\$60	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$28.32	\$44.28	\$20.24	\$45.11	\$27.78	\$2.50	\$27.06	\$28.15	\$32.74	\$53.33	\$44.60	\$36.55
	Median	\$5	\$3	\$10	\$12	\$0	\$0	\$10	\$10	\$0	\$30	\$14	\$8
F&B RESTRNT	Mean	\$63.80	\$110.61	\$61.45	\$37.33	\$81.44	\$41.25	\$63.96	\$53.54	\$107.00	\$120.42	\$129.67	\$71.83
	Median	\$10	\$0	\$36	\$21	\$0	\$0	\$21	\$10	\$16	\$0	\$50	\$15
OPT TOUR	Mean	\$61.61	\$58.69	\$46.90	\$49.89	\$374.44	\$0.00	\$71.71	\$51.54	\$59.30	\$38.33	\$68.00	\$62.69
	Median	\$0	\$0	\$0	\$0	\$50	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$114.48	\$152.06	\$180.69	\$140.56	\$170.00	\$93.75	\$123.22	\$106.77	\$151.30	\$87.50	\$221.20	\$158.23
	Median	\$20	\$18	\$100	\$55	\$200	\$0	\$40	\$11	\$20	\$0	\$128	\$40
GIFT- OTHER	Mean	\$103.07	\$122.41	\$106.62	\$100.94	\$677.22	\$125.00	\$99.73	\$84.81	\$97.83	\$100.83	\$168.53	\$112.31
	Median	\$50	\$44	\$65	\$51	\$200	\$0	\$50	\$50	\$25	\$25	\$130	\$50
TRANS	Mean	\$9.41	\$14.00	\$9.55	\$0.78	\$9.89	\$6.25	\$9.28	\$8.30	\$15.33	\$17.29	\$10.13	\$10.28
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$224.63	\$425.49	\$215.07	\$230.78	\$397.00	\$912.50	\$190.60	\$188.64	\$294.57	\$844.17	\$764.67	\$277.96
	Median	\$0	\$0	\$6	\$32	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$632.30	\$982.09	\$657.76	\$655.22	\$1,854.44	\$1,218.75	\$613.98	\$540.74	\$816.37	\$1,323.12	\$1,442.27	\$771.31
	Median	\$500	\$800	\$600	\$375	\$1,000	\$625	\$500	\$400	\$800	\$888	\$1,100	\$500

# TOTAL EXPENDITURES – TRACKING



YTD=\$1,197.02

# 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	\$1,124.84	\$1,256.32	\$1,207.69	\$976.65	\$2,410.10	\$1,124.10	\$1,204.27	\$1,085.40	\$1,086.40	\$1,124.47	\$1,875.25	\$1,135.97
	Median	\$1,007	\$1,142	\$1,270	\$968	\$1,597	\$944	\$1,076	\$990	\$1,042	\$1,075	\$1,912	\$1,024
	Minimum	\$0	\$0	\$271	\$0	\$474	\$0	\$0	\$0	\$0	\$367	\$500	\$0
	Maximum	\$7,425	\$3,449	\$2,000	\$3,185	\$7,425	\$2,706	\$3,590	\$3,590	\$2,324	\$2,404	\$3,449	\$3,590

# 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.

Comparison of Drivers of Overall Satisfaction, Oct, Nov, Dec 2014, Jan, Feb, 2015, and Overall Oct-2014 - Feb 2015						
	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Combin ed Oct- 2014 - Feb 2015
Drivers:	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks		3			<b>3</b>	4
Ease of getting around						
Safety walking around at night						
Quality of daytime tours		5	4			6
Variety of daytime tours						
Quality of nighttime tours						
Variety of nighttime tours						
Quality of shopping	3				<b>4</b>	3
Variety of shopping		4		2		
Price of things on Guam						
Quality of hotel accommodations			2		<b>5</b>	5
Quality/cleanliness of air, sky						
Quality/cleanliness of parks		1				
Quality of landscape in Tumon	2					
Quality of landscape in Guam		2	1	1	<b>1</b>	1
Quality of ground handler	1					7
Quality/cleanliness of transportation vehicles			3	3	<b>2</b>	2
% of Overall Satisfaction Accounted For	47.0%	52.7%	37.9%	35.6%	<b>44.5%</b>	43.4%
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 February 2015 Period. By rank order they are:
  - **Quality of landscape in Guam,**
  - **Quality/cleanliness of transportation vehicles,**
  - **Quality & cleanliness of beaches & parks,**
  - **Quality of shopping, and**
  - **Quality of hotel accommodations.**
- With all five factors the overall  $r^2$  is .445 meaning that **44.5% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2014, Jan, Feb 2015 and Overall Oct-2014-Feb 2015						
	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Combined Oct-2014-Feb 2015
Drivers:	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks						
Ease of getting around			1			2
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			2			
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%	5.3%	0.0%	<b>0.0%</b>	1.4%
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 factors in the February 2015 Period.