



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2014 Market Segmentation

#### MARCH 2014



**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 **351** 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 **351** 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

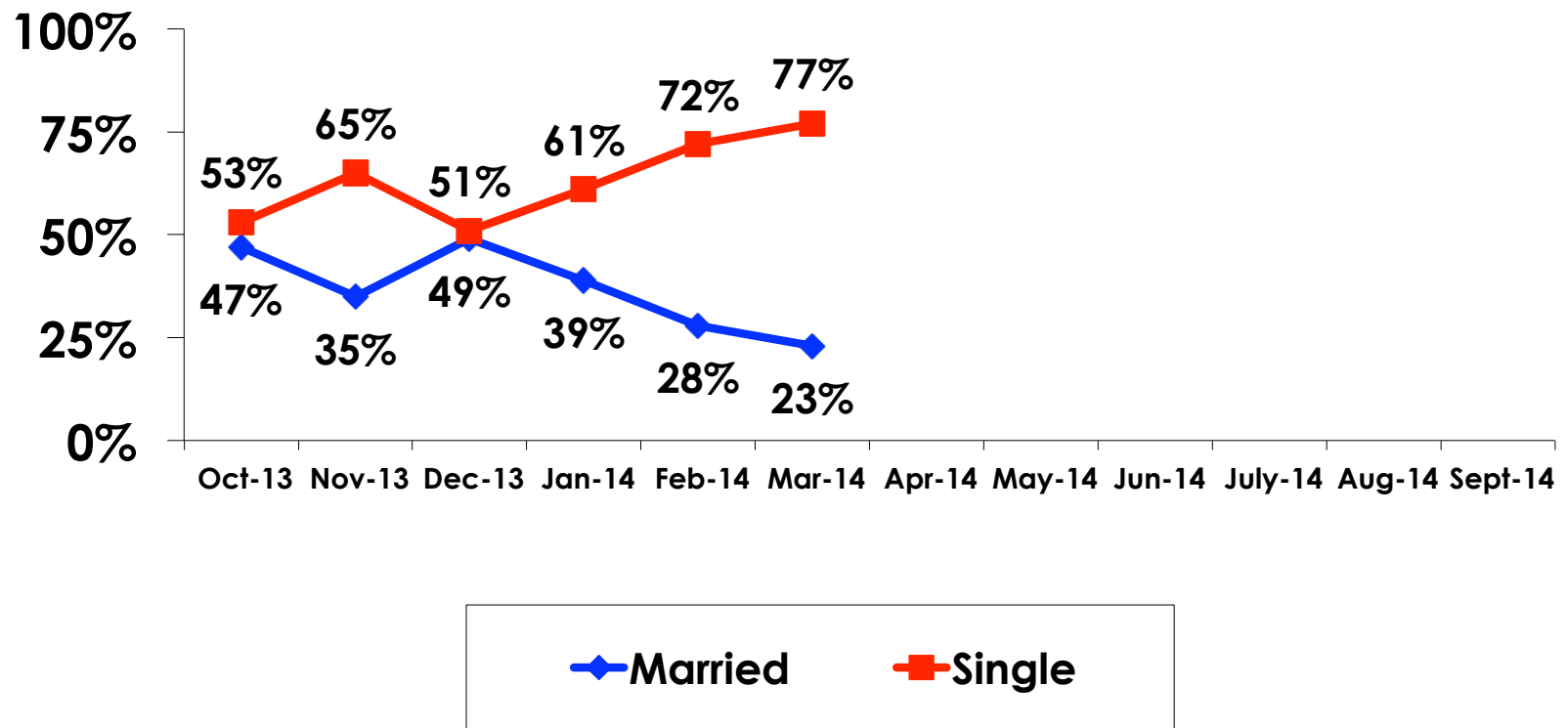
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

# 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
<b>Families</b>	39%	30%	45%	36%	25%	24%						
<b>Office Lady</b>	13%	12%	10%	15%	6%	5%						
<b>Group</b>	6%	5%	4%	3%	5%	6%						
<b>Silver</b>	2%	2%	4%	3%	1%	1%						
<b>Wedding</b>	8%	6%	4%	5%	3%	3%						
<b>Sport</b>	35%	40%	42%	35%	41%	43%						
<b>18-35</b>	64%	71%	61%	67%	78%	79%						
<b>36-55</b>	29%	24%	32%	27%	19%	19%						
<b>Child</b>	15%	9%	22%	14%	11%	13%						
<b>Honeymoon</b>	4%	3%	5%	2%	3%	1%						
<b>Repeat</b>	48%	43%	50%	43%	36%	28%						
<b>TOTAL</b>	<b>351</b>	<b>350</b>	<b>350</b>	<b>350</b>	<b>351</b>	<b>351</b>						

# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status Tracking

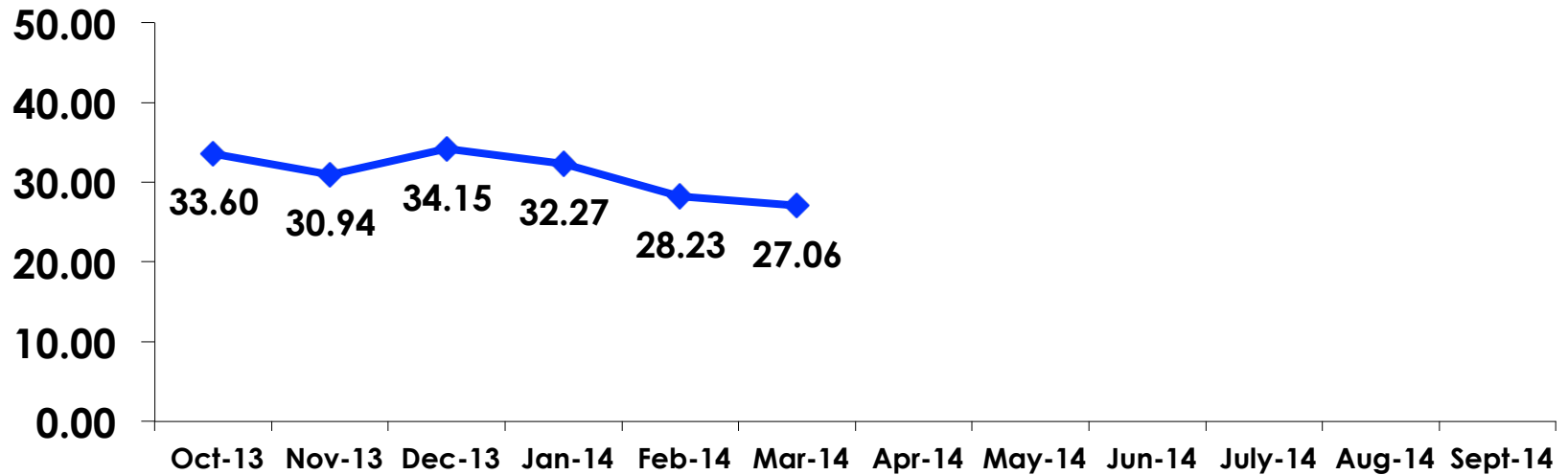


# Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	23%	83%	32%	18%	100%	56%	20%	7%	85%	98%	100%	46%
	Single	77%	17%	68%	82%		44%	80%	93%	15%	2%		54%
	Total Count	348	84	19	22	3	9	149	276	67	46	5	97



# Average Age Tracking



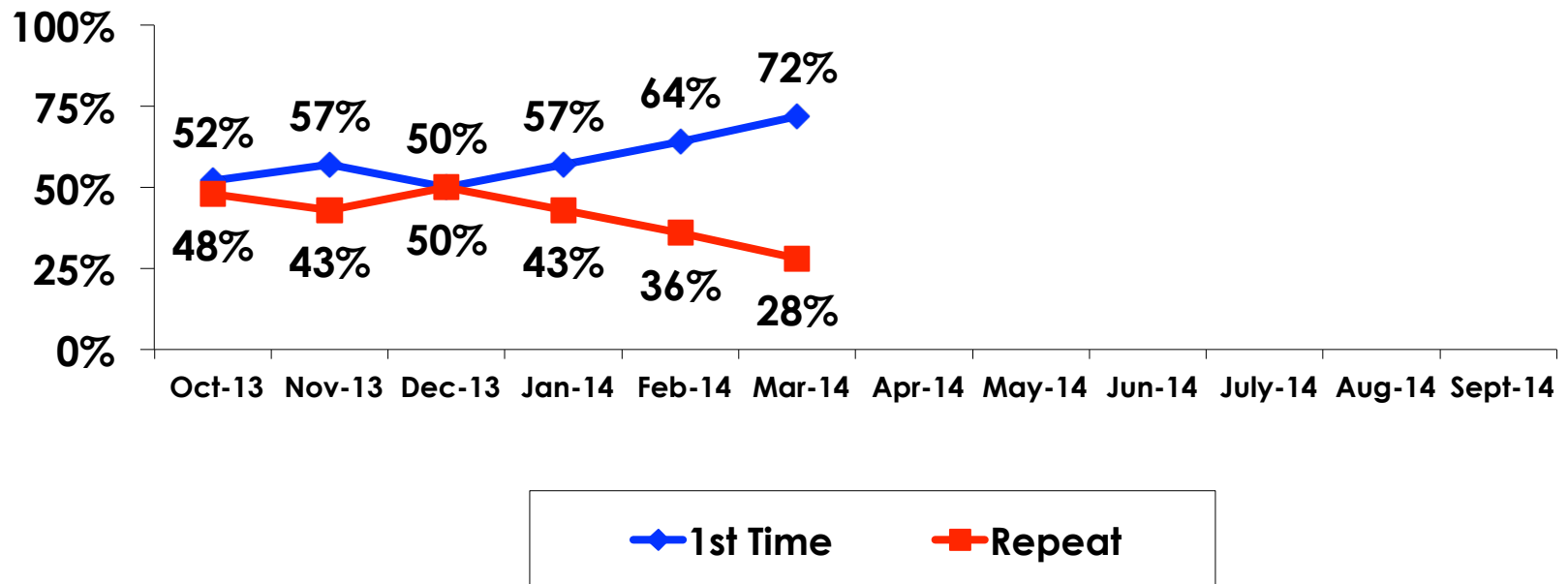
# Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	65%	6%	11%	86%		11%	70%	82%		2%	20%	33%
	25-34	13%	15%	53%	5%		44%	11%	17%		4%	40%	14%
	35-49	19%	69%	26%	9%		44%	13%	1%	91%	89%	40%	42%
	50+	3%	10%	11%		100%		5%		9%	4%		10%
	Total Count	349	84	19	22	3	9	150	277	67	46	5	97
QF	Mean	27.06	39.48	33.84	23.95	63.67	32.44	26.83	22.68	42.61	40.87	29.20	34.37
	Median	22	39	29	22	64	28	22	22	42	41	28	36

# Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	10%	1%	17%				8%	13%				4%
	Y2.0M-Y3.0M	6%	2%	22%	6%			5%	8%	1%		20%	2%
	Y3.0M-Y4.0M	9%	5%	6%	6%			10%	10%	4%	4%	20%	6%
	Y4.0M-Y5.0M	10%	18%	28%	13%		22%	7%	8%	18%	17%	20%	11%
	Y5.0M-Y7.0M	17%	15%	28%	13%		22%	14%	16%	19%	17%	20%	19%
	Y7.0M-Y10.0M	16%	27%		25%	33%	44%	16%	13%	25%	28%		20%
	Y10.0M+	16%	29%		13%	67%	11%	22%	11%	30%	33%		26%
	No Income	16%	2%		25%			17%	20%	1%		20%	12%
	Total Count	312	84	18	16	3	9	135	239	67	46	5	90

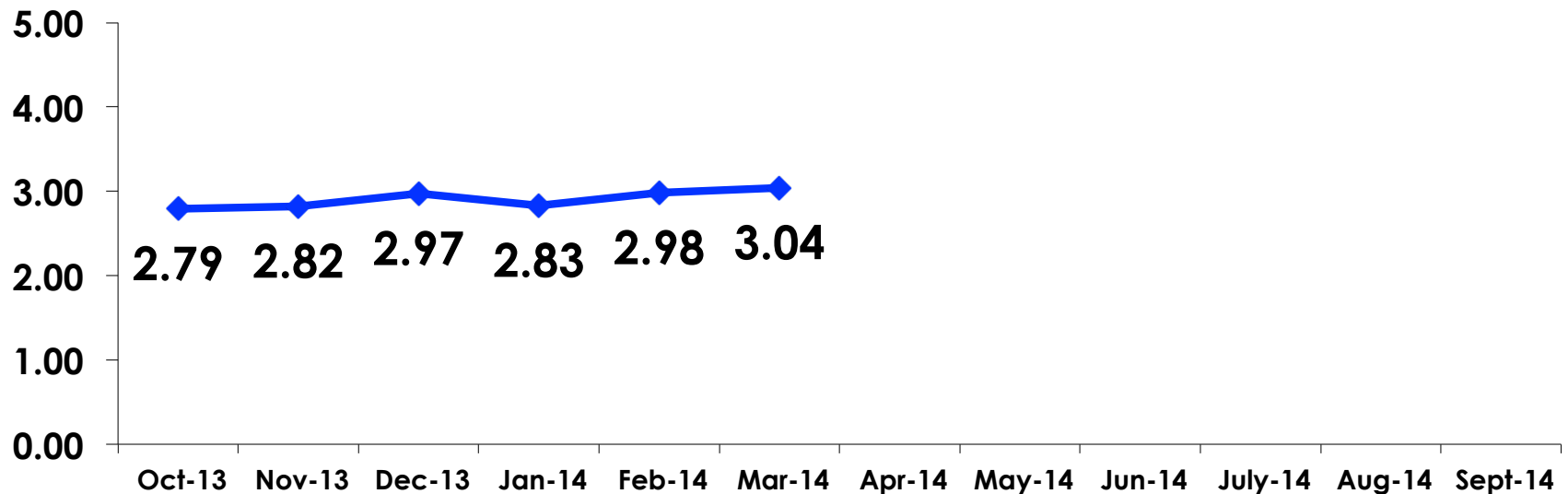
# Prior Trips to Guam Tracking



# Prior Trips to Guam Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	72%	40%	58%	77%		67%	74%	83%	33%	35%	100%	
	No	28%	60%	42%	23%	100%	33%	26%	17%	67%	65%		100%
	Total Count	351	84	19	22	3	9	151	277	67	46	5	98

# 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	3.04	3.39	2.58	3.41	6.67	3.33	3.09	2.95	3.21	3.17	3.80	3.21
	Median	3	3	3	3	6	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	59%	55%	58%			56%	58%	62%	49%	50%	100%	57%	
	Full package tour	25%	24%	11%		33%	11%	26%	25%	25%	26%		20%	
	Individually arranged travel (FIT)	10%	21%	21%		67%	33%	9%	6%	22%	24%		17%	
	Group tour	6%		11%	100%			7%	7%	3%			5%	
	Total	Count	350	84	19	22	3	9	151	276	67	46	5	98

# Travel Motivation Segmentation

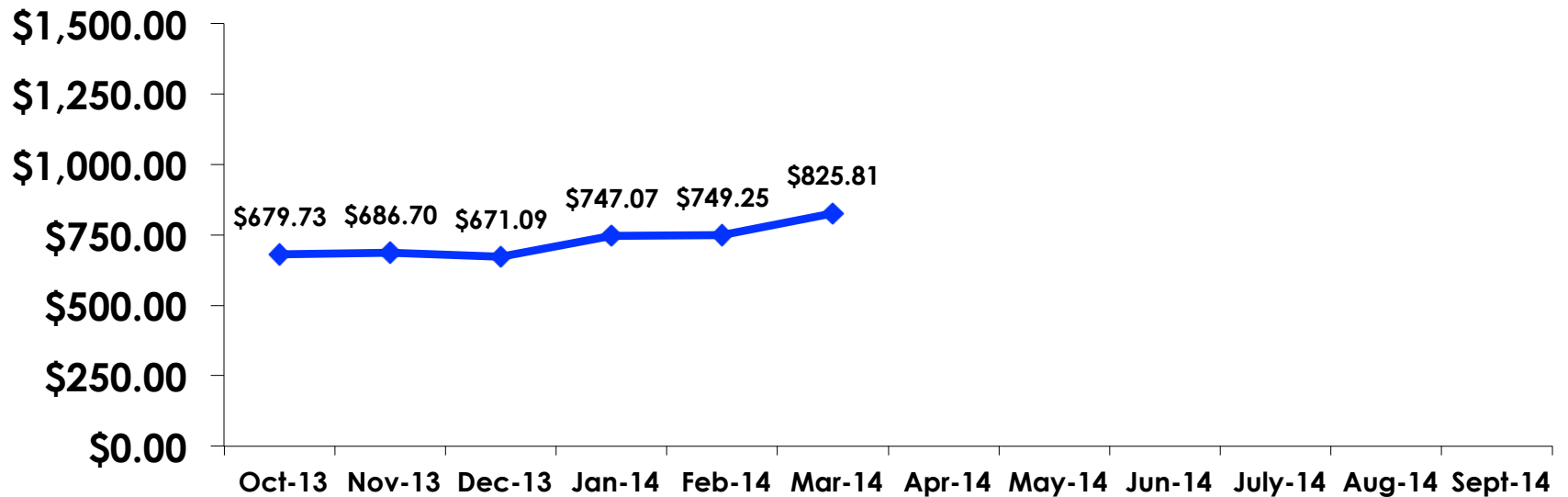
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	23%	57%	42%	14%	100%	22%	22%	12%	63%	65%		83%	
	Price	23%	15%	21%			27%	24%	16%	13%	20%		19%	
	Visit friends/ Relatives	3%			14%		3%	3%	1%				2%	
	Recomm- friend/family/trvl agnt	34%	7%	21%	43%		41%	41%	7%	9%			16%	
	Scuba	5%	4%		5%		11%	8%	6%	1%	2%		4%	
	Water sports	23%	21%	11%	5%		22%	32%	23%	24%	26%	20%	26%	
	Short travel time	43%	67%	42%	19%	67%	33%	42%	37%	70%	76%	40%	59%	
	Golf	3%	5%		10%	67%		4%	2%	4%			7%	
	Relax	30%	42%	53%			11%	34%	26%	45%	41%	20%	42%	
	Company/ Business Trip	3%	1%	16%	14%			1%	3%	1%			6%	
	Safe	19%	27%	32%	10%	67%		23%	17%	25%	26%		18%	
	Natural beauty	60%	65%	32%	19%	33%	22%	68%	59%	69%	74%	40%	61%	
	Shopping	31%	33%	47%	5%	33%	22%	25%	31%	33%	28%	20%	35%	
	Career Cert/ Testing	0%							0%					
	Married/ Attn wedding	3%	7%				100%	1%	2%	6%	2%	20%	3%	
	Honeymoon	1%	6%				11%		2%			100%		
	Pleasure	52%	49%	53%	24%		11%	52%	54%	48%	57%	20%	51%	
	Organized sports	3%	1%			33%		3%	3%				2%	
	Other	9%	2%		5%			9%	11%	3%	4%		4%	
	Total	Count	350	84	19	21	3	9	151	276	67	46	5	98

# Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	80%	79%	84%	68%	33%	56%	80%	80%	82%	83%	60%	76%	
	Travel Guidebook- Bookstore	49%	58%	47%	32%	33%	78%	50%	48%	55%	54%	60%	51%	
	Travel Agent Brochure	46%	43%	37%	23%		56%	48%	48%	37%	39%	60%	32%	
	Friend/ Relative	43%	20%	26%	32%	33%	44%	50%	50%	18%	20%	20%	24%	
	Magazine (Consumer)	39%	37%	53%	14%	33%	22%	35%	42%	30%	30%	40%	35%	
	Prior Trip	25%	54%	37%	23%	67%	33%	25%	15%	64%	61%		91%	
	TV	10%	5%	5%	5%			10%	12%	4%	2%		6%	
	Consumer Trvl Show	2%	1%				11%	3%	2%	1%			1%	
	GVB Promo	2%	1%					1%	2%	1%	2%		2%	
	Co-Worker/ Company Trvl Dept	1%	4%	5%	5%			1%	1%	3%	2%	20%	3%	
	GVB Office	1%	1%					1%	1%			20%	1%	
	Newspaper	1%						1%	1%					
	Other	0%	1%							1%	2%		1%	
	Travel Trade Show	0%							0%				1%	
	Radio	0%			5%				0%					
	Total	Count	351	84	19	22	3	9	151	277	67	46	5	98

# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures Tracking

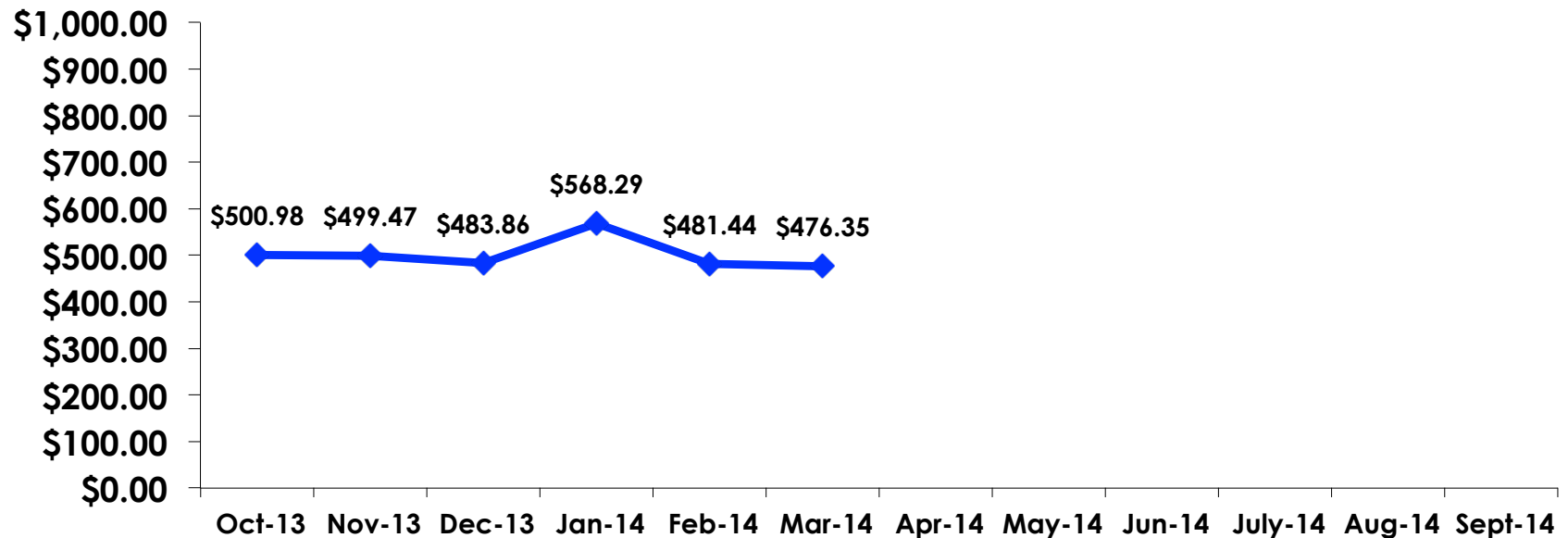


YTD=\$726.65

# 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	\$825.81	\$1,013.08	\$816.51	\$595.09	\$1,435.09	\$1,501.82	\$850.90	\$771.44	\$1,020.34	\$963.06	\$1,046.97	\$906.77
	Median	\$783	\$978	\$881	\$587	\$1,468	\$881	\$783	\$734	\$978	\$978	\$978	\$881
	Minimum	\$0	\$0	\$0	\$0	\$881	\$0	\$0	\$0	\$0	\$0	\$489	\$0
	Maximum	\$6,849	\$3,805	\$1,712	\$1,380	\$1,957	\$3,805	\$6,849	\$6,849	\$3,495	\$1,990	\$1,957	\$3,495

# On-Island Expenditures Tracking



YTD = \$501.71

# On-Island Expenditures Per Person Segmentation

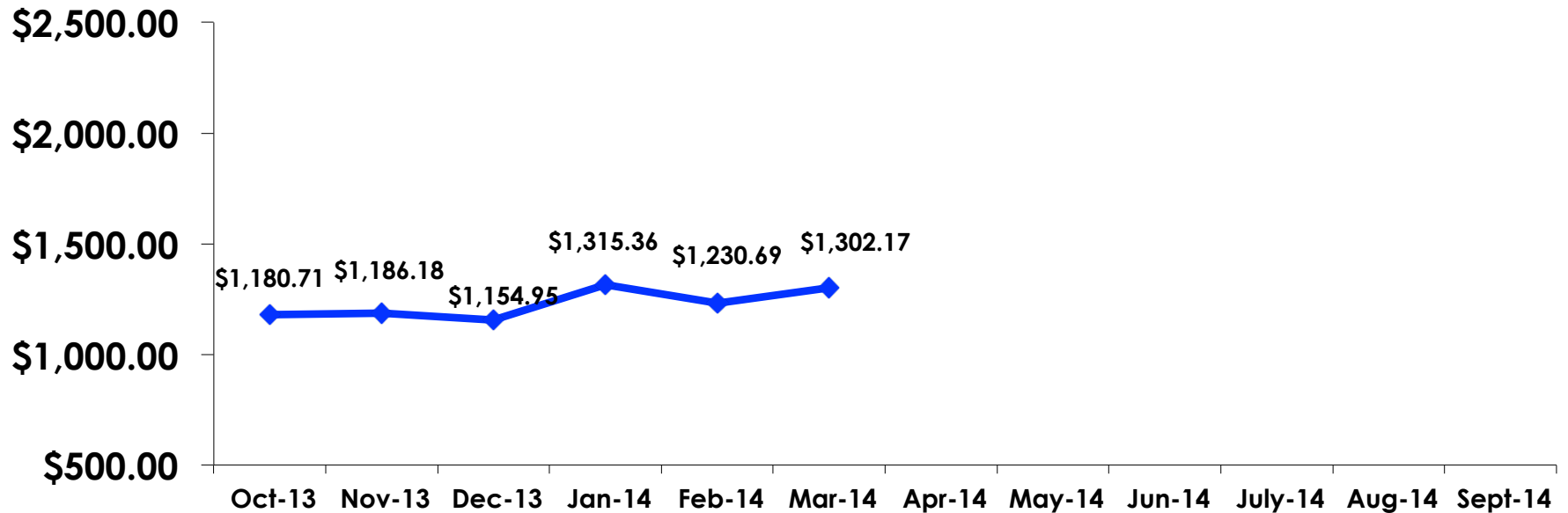
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$476.35	\$580.26	\$439.79	\$769.09	\$916.67	\$700.50	\$371.70	\$417.90	\$714.98	\$558.17	\$330.00	\$632.26
	Median	\$333	\$300	\$300	\$294	\$750	\$340	\$320	\$338	\$300	\$297	\$300	\$313
	Minimum	\$0	\$0	\$104	\$150	\$600	\$105	\$0	\$0	\$0	\$0	\$200	\$0
	Maximum	\$10,000	\$10,000	\$1,800	\$10,000	\$1,400	\$2,250	\$1,400	\$5,500	\$10,000	\$10,000	\$500	\$10,000



# 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	\$44.57	\$99.62	\$11.58	\$9.23	\$266.67	\$300.00	\$54.09	\$28.52	\$93.43	\$99.35	\$4.00	\$91.60
	Median	\$0	\$0	\$0	\$0	\$200	\$50	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$45.70	\$102.80	\$34.84	\$20.00	\$0.00	\$25.78	\$33.70	\$29.09	\$114.66	\$167.89	\$42.00	\$90.03
	Median	\$10	\$20	\$0	\$0	\$0	\$0	\$10	\$10	\$12	\$35	\$30	\$10
F&B RESTRNT	Mean	\$140.81	\$426.96	\$18.95	\$24.18	\$250.00	\$99.44	\$79.52	\$52.49	\$501.27	\$690.87	\$68.00	\$352.62
	Median	\$25	\$75	\$0	\$0	\$300	\$40	\$50	\$20	\$80	\$100	\$40	\$50
OPT TOUR	Mean	\$76.43	\$164.99	\$27.79	\$35.45	\$300.00	\$76.67	\$93.56	\$56.53	\$153.27	\$217.15	\$98.00	\$91.67
	Median	\$0	\$0	\$0	\$0	\$400	\$0	\$20	\$0	\$0	\$25	\$0	\$0
GIFT- SELF	Mean	\$158.26	\$314.88	\$162.63	\$492.82	\$133.33	\$138.89	\$78.79	\$82.52	\$481.94	\$340.22	\$50.00	\$306.89
	Median	\$30	\$100	\$20	\$5	\$100	\$50	\$10	\$20	\$100	\$140	\$0	\$50
GIFT- OTHER	Mean	\$111.45	\$202.58	\$137.89	\$46.36	\$233.33	\$100.33	\$88.60	\$85.31	\$218.18	\$264.89	\$162.00	\$165.70
	Median	\$60	\$100	\$100	\$0	\$200	\$50	\$50	\$50	\$100	\$100	\$50	\$100
TRANS	Mean	\$16.53	\$39.36	\$14.95	\$6.73	\$33.33	\$18.33	\$13.72	\$13.49	\$29.31	\$25.35	\$16.00	\$35.35
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$175.93	\$385.94	\$158.32	\$125.23	\$616.67	\$511.11	\$97.74	\$129.55	\$356.00	\$357.11	\$80.00	\$235.99
	Median	\$0	\$0	\$0	\$20	\$250	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$773.79	\$1,752.01	\$566.95	\$769.09	\$1,833.33	\$1,276.11	\$539.44	\$478.44	\$1,965.67	\$2,183.48	\$520.00	\$1,380.88
	Median	\$400	\$928	\$500	\$294	\$1,500	\$680	\$400	\$400	\$900	\$978	\$400	\$600

# Total Expenditures Tracking



YTD=\$1,228.36

# 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	\$1,302.17	\$1,593.33	\$1,256.30	\$1,364.18	\$2,351.76	\$2,202.32	\$1,222.60	\$1,189.34	\$1,735.32	\$1,521.23	\$1,376.97	\$1,539.03
	Median	\$1,176	\$1,374	\$1,283	\$921	\$2,218	\$1,674	\$1,132	\$1,085	\$1,406	\$1,351	\$1,375	\$1,278
	Minimum	\$0	\$0	\$200	\$200	\$1,481	\$985	\$0	\$0	\$0	\$0	\$689	\$0
	Maximum	\$11,380	\$10,702	\$2,681	\$11,380	\$3,357	\$5,305	\$7,349	\$7,349	\$11,380	\$10,702	\$2,257	\$11,380

# 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, Jan, Feb, Mar 2014, and Overall Oct-2013 - Mar 2014							
	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	<b>Mar-14</b>	Combin ed Oct-201 3 - Mar 2014
Drivers:	rank	rank	rank	rank	rank	<b>rank</b>	rank
Quality & Cleanliness of beaches & parks			3	4	2	<b>1</b>	3
Ease of getting around							
Safety walking around at night							
Quality of daytime tours	2			3		<b>4</b>	
Variety of daytime tours							6
Quality of nighttime tours							
Variety of nighttime tours							9
Quality of shopping	4		5				4
Variety of shopping				1			
Price of things on Guam				5	4	<b>2</b>	
Quality of hotel accommodations			2		3		5
Quality/cleanliness of air, sky	3	4			5		7
Quality/cleanliness of parks						<b>5</b>	
Quality of landscape in Tumon	1	2					
Quality of landscape in Guam			1	2	1	<b>3</b>	1
Quality of ground handler		1					8
Quality/cleanliness of transportation vehicles		3	4				2
% of Per Person On Island Expenditures Accounted For	45.2%	41.7%	47.4%	42.5%	52.4%	<b>51.5%</b>	46.5%

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 March 2014 Period. By rank order they are:
  - **Quality & cleanliness of beaches & parks,**
  - **Price of things on Guam,**
  - **Quality of landscape in Guam,**
  - **Quality of day time tours, and**
  - **Quality/cleanliness of parks.**
- With all four factors the overall  $r^2$  is .515 meaning that **51.5% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2013, Jan, Feb, Mar 2014 and Overall Oct-2013-Mar 2014							
	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Combined Oct-2013-Mar 2014
Drivers:	rank	rank	rank	rank	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							
Quality of nighttime tours							
Variety of nighttime tours							1
Quality of shopping							2
Variety of shopping				1			
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%	0.0%	2.9%	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 factor in the March 2014 Period.