



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2014 Market Segmentation

### AUGUST 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 **352** 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 **352** 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

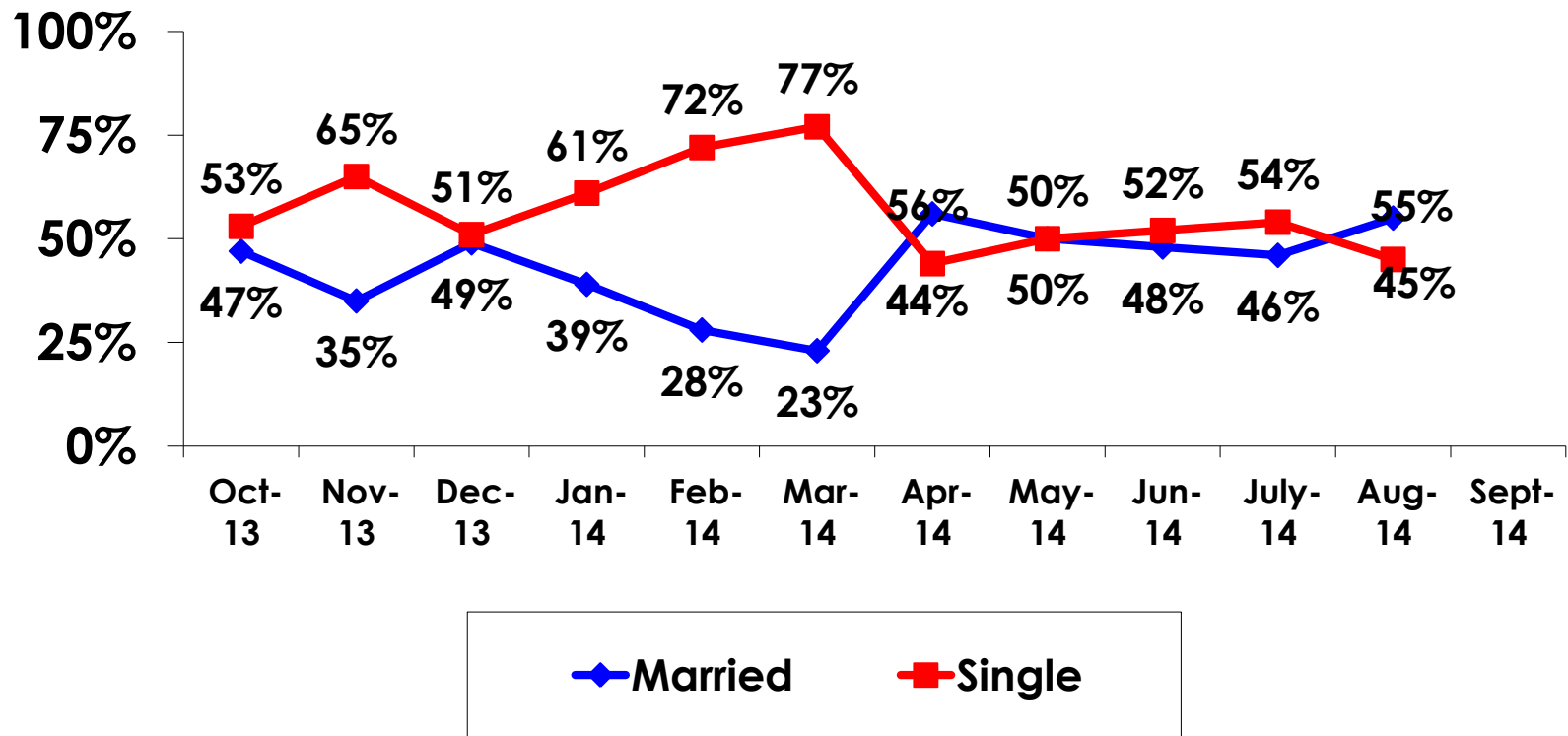
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

# 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%	52%	46%	40%	39%	56%	
<b>Office Lady</b>	13%	12%	10%	15%	6%	5%	6%	14%	15%	15%	9%	
<b>Group</b>	6%	5%	4%	3%	5%	6%	5%	9%	5%	6%	1%	
<b>Silver</b>	2%	2%	4%	3%	1%	1%	5%	7%	9%	5%	2%	
<b>Wedding</b>	8%	6%	4%	5%	3%	3%	5%	10%	5%	5%	1%	
<b>Sport</b>	35%	40%	42%	35%	41%	43%	38%	33%	30%	27%	38%	
<b>18-35</b>	64%	71%	61%	67%	78%	79%	50%	64%	61%	62%	52%	
<b>36-55</b>	29%	24%	32%	27%	19%	19%	42%	26%	27%	29%	44%	
<b>Child</b>	15%	9%	22%	14%	11%	13%	28%	11%	12%	13%	41%	
<b>Honeymoon</b>	4%	3%	5%	2%	3%	1%	5%	5%	7%	4%	1%	
<b>Repeat</b>	48%	43%	50%	43%	36%	28%	43%	49%	49%	54%	51%	
<b>TOTAL</b>	<b>351</b>	<b>350</b>	<b>350</b>	<b>350</b>	<b>351</b>	<b>351</b>	<b>350</b>	<b>350</b>	<b>351</b>	<b>351</b>	<b>352</b>	

# SECTION 1 **PROFILE OF RESPONDENTS**

# MARITAL STATUS - TRACKING

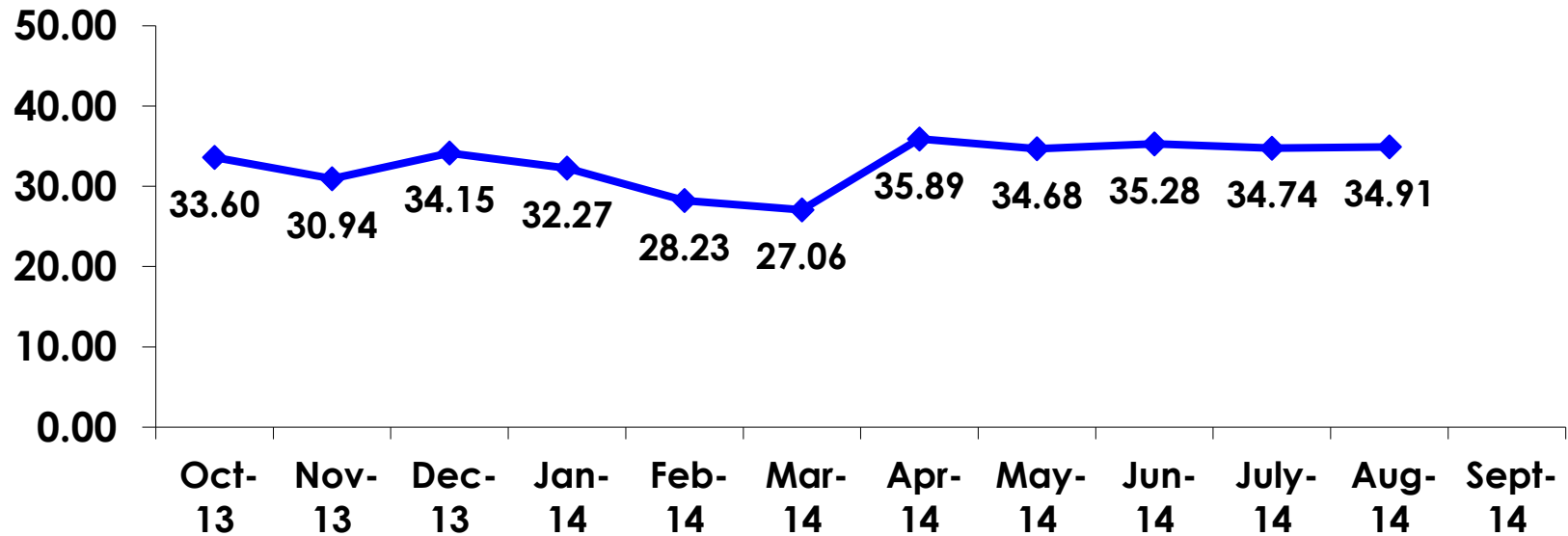


# MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	55%	93%	34%	100%	100%	100%	48%	18%	94%	98%	100%	68%
	Single	45%	7%	66%				52%	82%	6%	2%		32%
	Total Count	352	198	32	2	6	5	135	184	156	144	4	179



# AVERAGE AGE - TRACKING



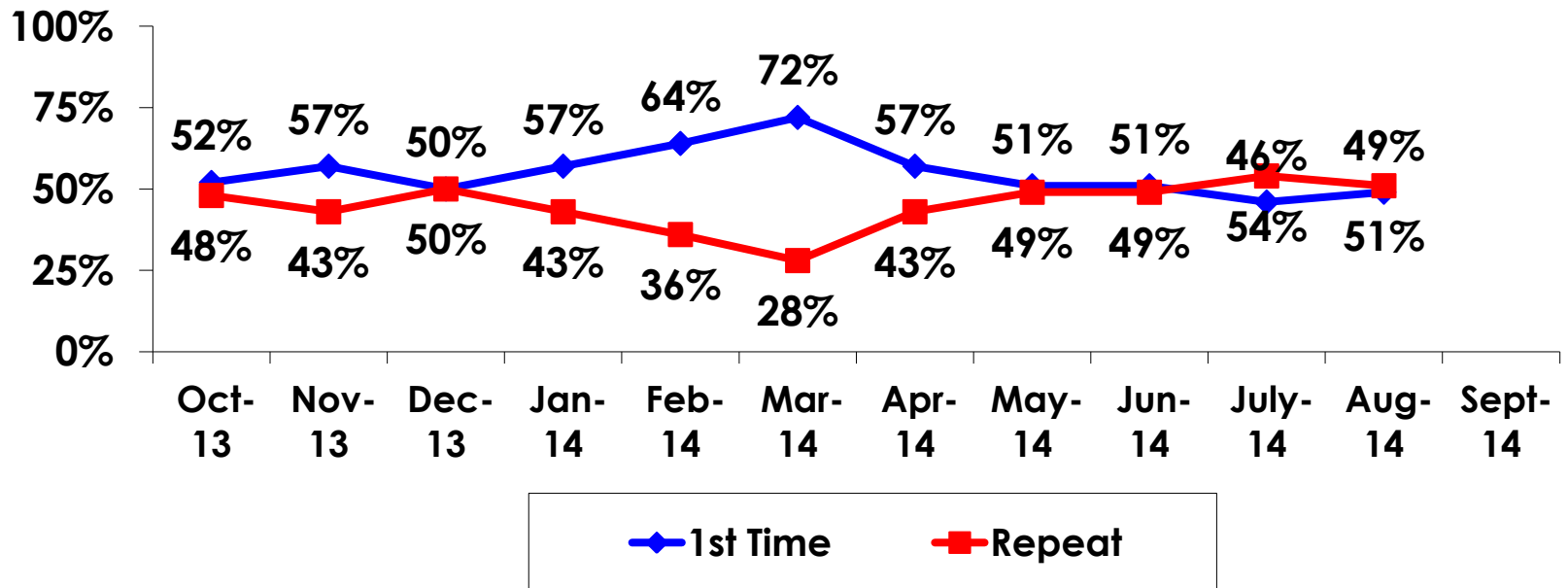
# AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	19%	3%	16%				19%	37%			25%	11%
	25-34	31%	16%	53%	50%		20%	43%	59%		7%	75%	23%
	35-49	39%	64%	25%	50%		60%	25%	4%	83%	78%		53%
	50+	11%	17%	6%		100%	20%	13%		17%	15%		13%
	Total Count	351	197	32	2	6	5	134	184	156	143	4	178
QF	Mean	34.91	41.50	32.09	32.00	63.17	45.00	33.76	26.07	43.54	42.36	28.50	38.33
	Median	34	41	28	32	63	41	30	26	43	42	29	40

# INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	3%	1%	13%				3%	5%	2%	1%		2%
	Y2.0M-Y3.0M	11%	2%	23%	50%			12%	21%	1%	1%		9%
	Y3.0M-Y4.0M	9%	5%	13%		33%	40%	10%	14%	4%	4%		5%
	Y4.0M-Y5.0M	15%	16%	6%	50%	17%	40%	20%	17%	14%	12%	25%	16%
	Y5.0M-Y7.0M	18%	22%	16%		17%	20%	14%	16%	21%	20%	50%	21%
	Y7.0M-Y10.0M	15%	22%	10%		17%		18%	9%	22%	23%		17%
	Y10.0M+	24%	31%	19%		17%		21%	15%	36%	39%		30%
	No Income	3%	1%					2%	5%	1%		25%	1%
	Total Count	339	193	31	2	6	5	132	175	153	140	4	174

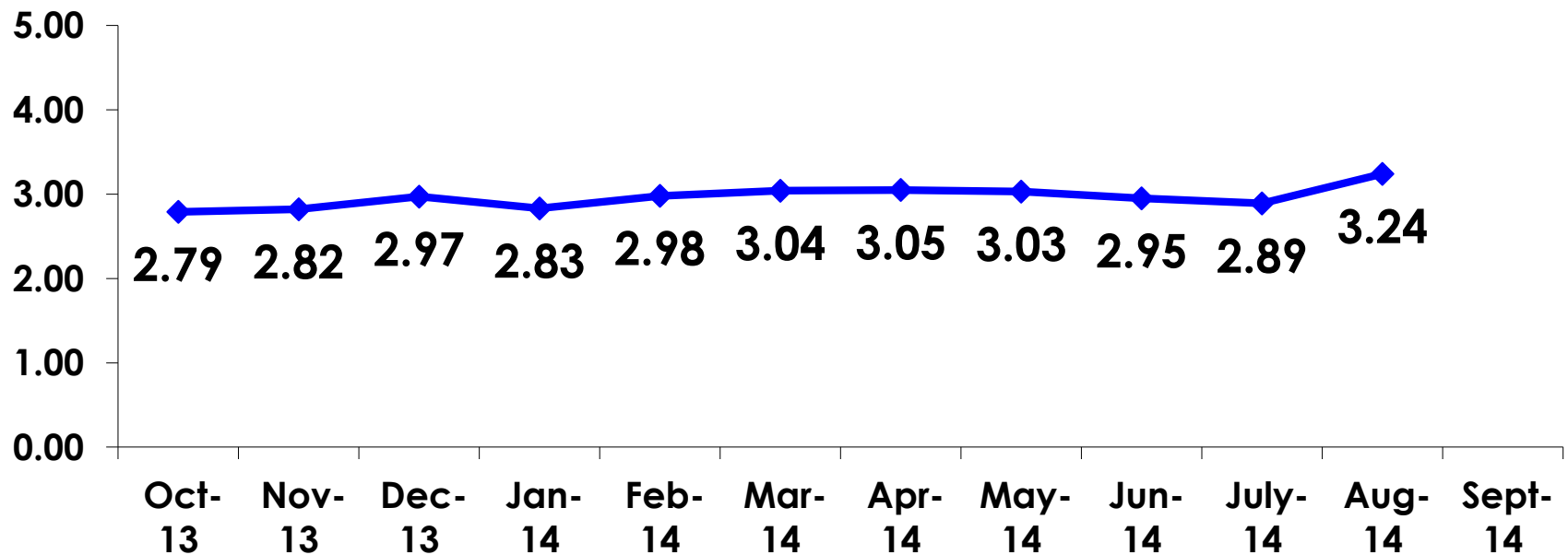
# PRIOR TRIPS TO GUAM - TRACKING



# PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	49%	36%	53%	50%		60%	53%	63%	35%	33%	100%	
	No	51%	64%	47%	50%	100%	40%	47%	37%	65%	67%		100%
	Total Count	351	198	32	2	6	5	135	183	156	144	4	179

# 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	3.24	3.50	2.91	3.00	4.17	2.60	3.19	3.01	3.48	3.59	3.50	3.39
	Median	3	3	3	3	4	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	63%	55%	78%		33%	20%	70%	70%	55%	52%	25%	58%	
	Full package tour	23%	23%	9%		33%	60%	21%	24%	22%	22%	75%	21%	
	Individually arranged travel (FIT)	13%	20%	13%		33%	20%	8%	5%	21%	24%		20%	
	Group tour	1%	1%		100%			1%	1%	1%	1%		1%	
	Other	0%	1%							1%	1%		1%	
	Company paid travel	0%	1%							1%	1%		1%	
	Total	Count	350	197	32	2	6	5	134	183	155	143	4	178

# TRAVEL MOTIVATION - SEGMENTATION

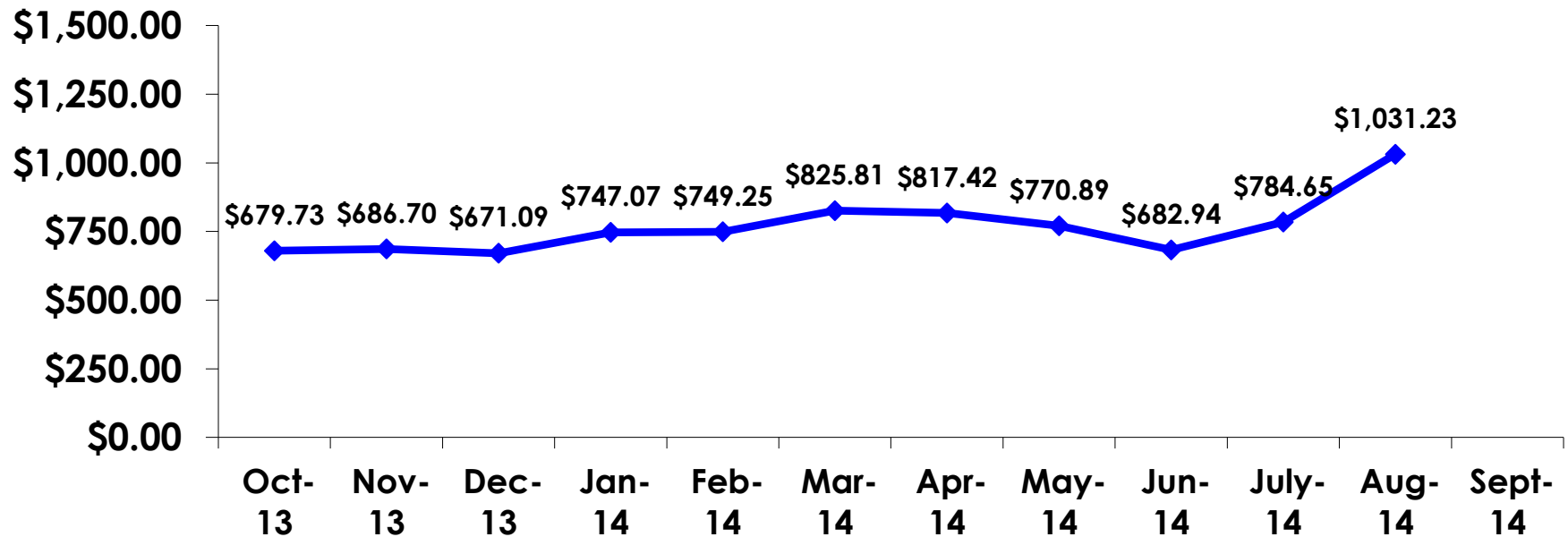
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	42%	55%	38%	50%	67%	20%	38%	28%	57%	62%		83%	
	Price	26%	23%	34%		17%	20%	26%	26%	26%	22%		26%	
	Visit friends/ Relatives	1%	1%					1%	1%		1%		1%	
	Recomm- friend/family/trvl agnt	21%	14%	25%		33%	20%	23%	29%	12%	13%		11%	
	Scuba	5%	4%	6%				10%	7%	3%	2%	25%	3%	
	Water sports	30%	25%	31%		17%		52%	36%	23%	25%		29%	
	Short travel time	59%	62%	56%	50%	50%	80%	58%	52%	65%	61%	25%	66%	
	Golf	3%	6%			17%		4%	1%	6%	5%		6%	
	Relax	39%	35%	38%				46%	45%	32%	31%	25%	39%	
	Company/ Business Trip	1%	1%		50%			2%	1%	1%	1%		1%	
	Company Sponsored	0%	1%	3%						1%	1%			
	Safe	26%	31%	13%		17%		26%	23%	29%	32%	25%	30%	
	Natural beauty	66%	61%	59%		33%	40%	71%	69%	62%	62%	25%	64%	
	Shopping	40%	32%	41%		17%		44%	48%	32%	33%	25%	41%	
	Career Cert/ Testing	0%	1%					1%		1%	1%		1%	
	Married/ Attn wedding	1%	3%			17%	100%	1%	1%	2%	1%		1%	
	Honeymoon	1%	2%					2%	2%			100%		
	Pleasure	57%	53%	56%		17%		63%	63%	52%	52%	25%	60%	
	Organized sports	1%	1%						1%	1%	1%		1%	
	Other	4%	5%			17%		3%	2%	5%	5%		4%	
	Total	Count	350	197	32	2	6	5	133	183	155	143	4	178

# INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	78%	80%	81%	50%	67%	60%	79%	80%	78%	81%	50%	80%	
	Travel Guidebook- Bookstore	59%	57%	63%	50%	17%	40%	59%	61%	57%	58%	75%	53%	
	Prior Trip	44%	56%	44%	50%	83%	40%	41%	31%	59%	59%		87%	
	Travel Agent Brochure	42%	38%	44%		17%		45%	44%	39%	42%	25%	39%	
	Magazine (Consumer)	36%	33%	31%			40%	43%	39%	35%	37%	25%	35%	
	Friend/ Relative	28%	20%	19%	50%	17%	40%	27%	36%	19%	20%	50%	21%	
	TV	7%	6%	9%				7%	10%	4%	4%		6%	
	Co-Worker/ Company Trvl Dept	2%	3%					1%	3%	1%	2%		2%	
	Other	2%	2%	3%		17%		1%	2%	1%	1%		2%	
	Consumer Trvl Show	1%		3%				2%	2%				1%	
	GVB Office	1%	2%						1%	1%	1%		1%	
	Newspaper	1%	1%	3%				1%		2%	1%		2%	
	GVB Promo	1%	1%							1%	1%		1%	
	Travel Trade Show	0%	1%					1%	1%					
	Theater Ad	0%	1%				20%		1%					
	Total	Count	351	198	32	2	6	5	135	183	156	144	4	179

# SECTION 3 **EXPENDITURES**

# PREPAID EXPENDITURES - TRACKING

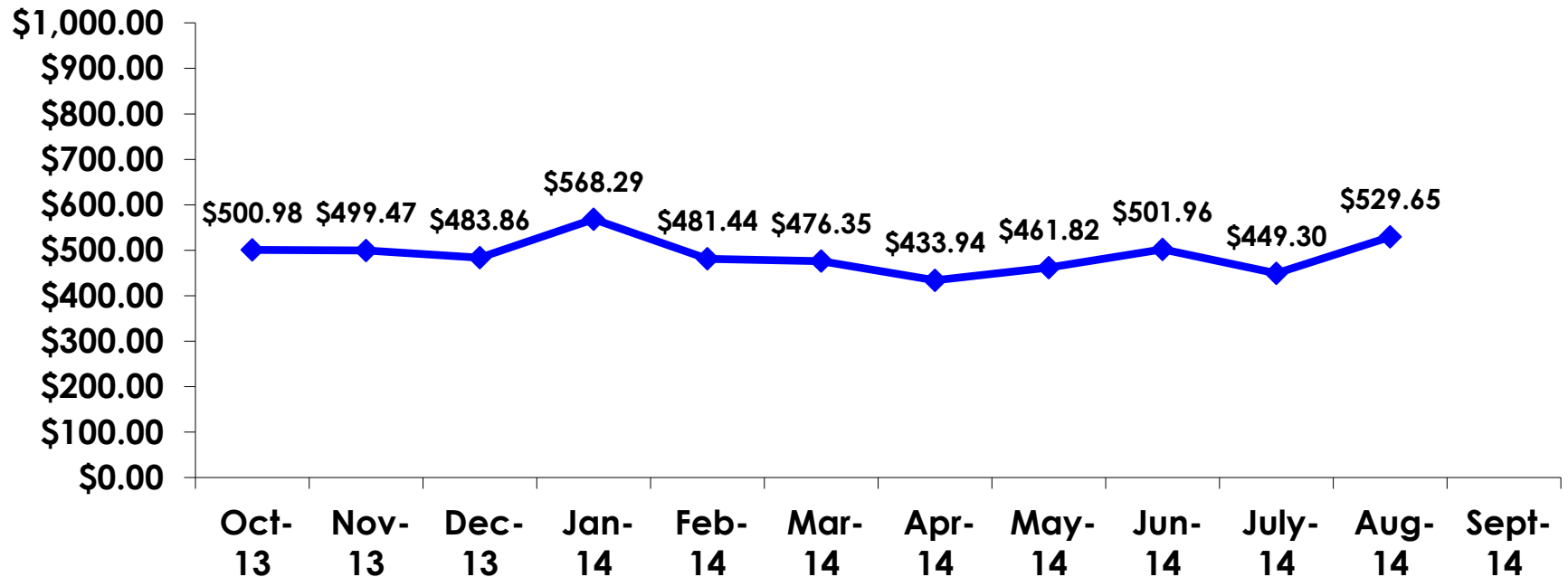


YTD=\$767.98

# 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	\$1,031.23	\$1,085.05	\$867.37	\$582.58	\$907.59	\$977.44	\$1,089.57	\$988.99	\$1,081.22	\$1,119.39	\$837.46	\$1,022.33
	Median	\$976	\$1,149	\$898	\$583	\$769	\$1,165	\$1,020	\$971	\$1,133	\$1,214	\$753	\$1,068
	Minimum	\$0	\$0	\$0	\$291	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,884	\$3,884	\$2,136	\$874	\$1,748	\$1,456	\$3,884	\$3,884	\$3,301	\$3,884	\$1,845	\$3,301

# ON-ISLAND EXPENDITURES - TRACKING



YTD = \$489.74

# ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

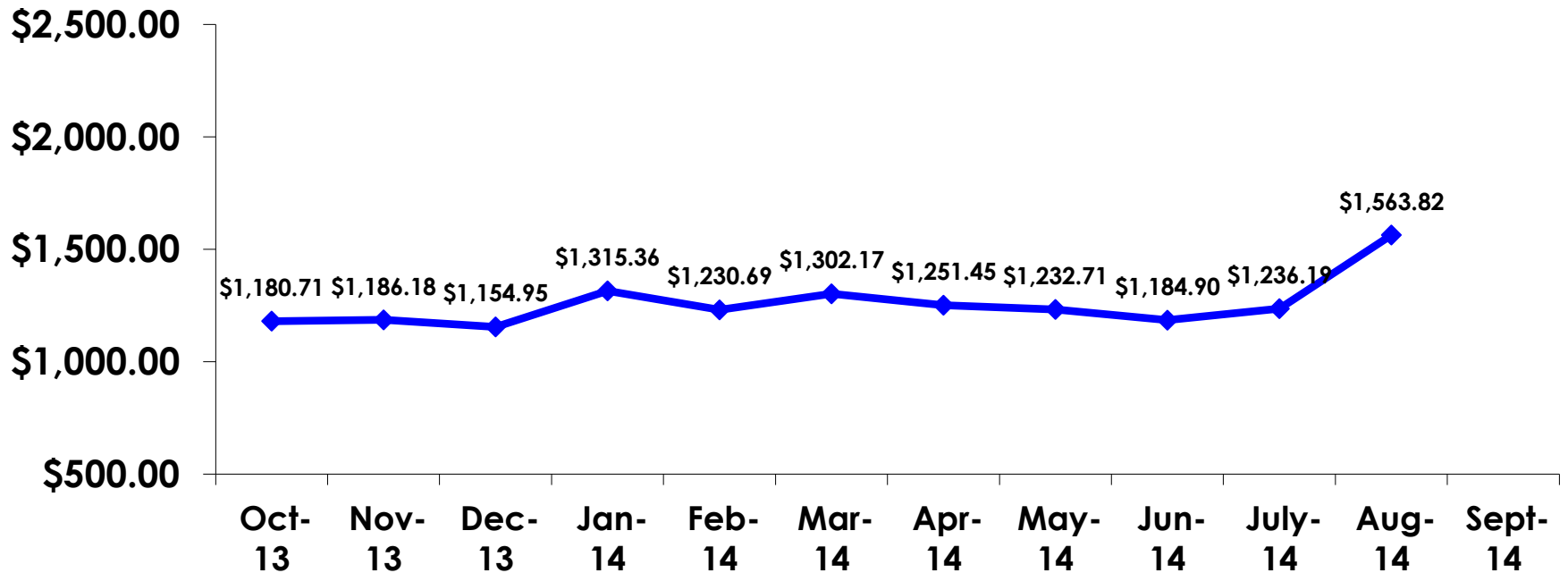
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$529.65	\$478.12	\$564.52	\$417.50	\$666.67	\$813.33	\$568.51	\$604.51	\$451.21	\$416.74	\$483.50	\$579.69
	Median	\$400	\$333	\$500	\$418	\$400	\$350	\$500	\$500	\$333	\$327	\$592	\$400
	Minimum	\$0	\$0	\$20	\$250	\$0	\$150	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$6,000	\$6,000	\$1,700	\$585	\$1,500	\$1,800	\$6,000	\$6,000	\$6,000	\$6,000	\$750	\$6,000



# 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	\$74.73	\$123.90	\$74.50	\$0.00	\$716.67	\$150.00	\$65.21	\$24.21	\$111.51	\$125.49	\$125.00	\$105.78
	Median	\$0	\$0	\$0	\$0	\$600	\$0	\$0	\$0	\$0	\$20	\$0	\$0
F&B FF/STORE	Mean	\$54.64	\$75.12	\$32.97	\$75.00	\$70.00	\$110.00	\$52.24	\$54.62	\$54.25	\$79.15	\$50.00	\$70.50
	Median	\$10	\$23	\$5	\$75	\$0	\$50	\$20	\$8	\$20	\$23	\$50	\$10
F&B RESTRNT	Mean	\$113.56	\$157.77	\$55.59	\$75.00	\$103.33	\$100.00	\$115.15	\$77.31	\$159.80	\$158.74	\$37.50	\$133.66
	Median	\$35	\$99	\$3	\$75	\$50	\$0	\$50	\$16	\$100	\$89	\$25	\$50
OPT TOUR	Mean	\$103.02	\$126.34	\$46.56	\$92.50	\$250.00	\$130.00	\$139.64	\$76.22	\$129.03	\$129.44	\$140.00	\$102.88
	Median	\$0	\$0	\$0	\$93	\$200	\$0	\$100	\$0	\$0	\$0	\$100	\$0
GIFT- SELF	Mean	\$212.07	\$253.79	\$226.28	\$10.00	\$25.00	\$170.00	\$254.81	\$213.64	\$224.60	\$243.37	\$87.50	\$250.69
	Median	\$50	\$100	\$50	\$10	\$0	\$200	\$60	\$50	\$100	\$50	\$50	\$60
GIFT- OTHER	Mean	\$132.77	\$126.76	\$156.50	\$40.00	\$116.67	\$200.00	\$132.47	\$145.18	\$120.53	\$132.36	\$50.00	\$156.94
	Median	\$85	\$80	\$48	\$40	\$100	\$200	\$100	\$85	\$80	\$55	\$50	\$100
TRANS	Mean	\$25.99	\$37.01	\$16.41	\$0.00	\$26.67	\$20.00	\$17.15	\$15.90	\$37.83	\$41.40	\$52.00	\$35.63
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$4	\$0
OTHER	Mean	\$319.27	\$422.52	\$356.44	\$500.00	\$291.67	\$440.00	\$289.04	\$221.61	\$442.72	\$418.26	\$395.00	\$419.02
	Median	\$0	\$0	\$0	\$500	\$25	\$0	\$0	\$0	\$0	\$0	\$40	\$0
TOTAL	Mean	\$1,032.60	\$1,327.04	\$849.92	\$792.50	\$1,600.00	\$1,320.00	\$1,055.26	\$818.31	\$1,284.76	\$1,324.32	\$967.00	\$1,259.08
	Median	\$800	\$1,000	\$629	\$793	\$1,500	\$800	\$700	\$600	\$1,000	\$1,000	\$1,184	\$1,000

# TOTAL EXPENDITURES – TRACKING



YTD=\$1,258.15

# 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	\$1,563.82	\$1,568.67	\$1,431.89	\$1,000.08	\$1,574.25	\$1,790.77	\$1,658.08	\$1,598.90	\$1,532.44	\$1,536.14	\$1,320.96	\$1,607.76
	Median	\$1,532	\$1,571	\$1,457	\$1,000	\$1,628	\$1,561	\$1,568	\$1,521	\$1,561	\$1,562	\$1,345	\$1,541
	Minimum	\$0	\$0	\$63	\$876	\$0	\$1,315	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$7,020	\$7,020	\$2,862	\$1,124	\$2,956	\$2,956	\$7,020	\$6,000	\$7,020	\$6,000	\$2,595	\$7,020

# 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 2013, Jan, Feb, Mar, Apr, May, Jun, Jul, Aug 2014, and Overall Oct-2013 - Aug 2014**

	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Combined Oct-2013 - Aug 2014
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks			3	4	2	1		4	5	3	<b>4</b>	4
Ease of getting around								3	1			11
Safety walking around at night												
Quality of daytime tours	2			3		4		6	4			
Variety of daytime tours											<b>3</b>	6
Quality of nighttime tours												
Variety of nighttime tours												
Quality of shopping	4		5				1		6		<b>2</b>	3
Variety of shopping				1						4		
Price of things on Guam				5	4	2		5				
Quality of hotel accommodations			2		3					2		5
Quality/cleanliness of air, sky	3	4			5						<b>6</b>	7
Quality/cleanliness of parks						5					<b>7</b>	8
Quality of landscape in Tumon	1	2										9
Quality of landscape in Guam			1	2	1	3	3	1	2	1	<b>5</b>	1
Quality of ground handler		1					2					10
Quality/cleanliness of transportation vehicles		3	4				4	2	3		<b>1</b>	2
% of Per Person On Island Expenditures Accounted For	45.2%	41.7%	47.4%	42.5%	52.4%	51.5%	35.8%	56.0%	45.0%	50.4%	<b>59.4%</b>	47.7%

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 seven significant factors in the August 2014 Period. By rank order they are:
  - **Quality/cleanliness of transportation vehicles,**
  - **Quality of shopping,**
  - **Variety of day time tours,**
  - **Quality/cleanliness of beaches & parks,**
  - **Quality of landscape in Guam,**
  - **Quality/cleanliness of air, sky, and**
  - **Quality/cleanliness of parks.**
- With all seven factors the overall  $r^2$  is .594 meaning that **59.4% 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, Apr, May, Jun, Jul, Aug 2014 and Overall Oct-2013-Aug 2014**

	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Combined Oct-2013-Aug 2014
Drivers:	rank	rank	rank	rank	rank	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										2		
Variety of nighttime tours												2
Quality of shopping									1			1
Variety of shopping				1								
Price of things on Guam										1		
Quality of hotel accommodations												
Quality/cleanliness of air, sky												
Quality/cleanliness of parks												
Quality of landscape in Tumon								1				3
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%	0.0%	0.0%	2.3%	3.5%	4.5%	<b>0.0%</b>	1.2%

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 August 2014 Period.