



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2014 Market Segmentation

#### JUNE 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

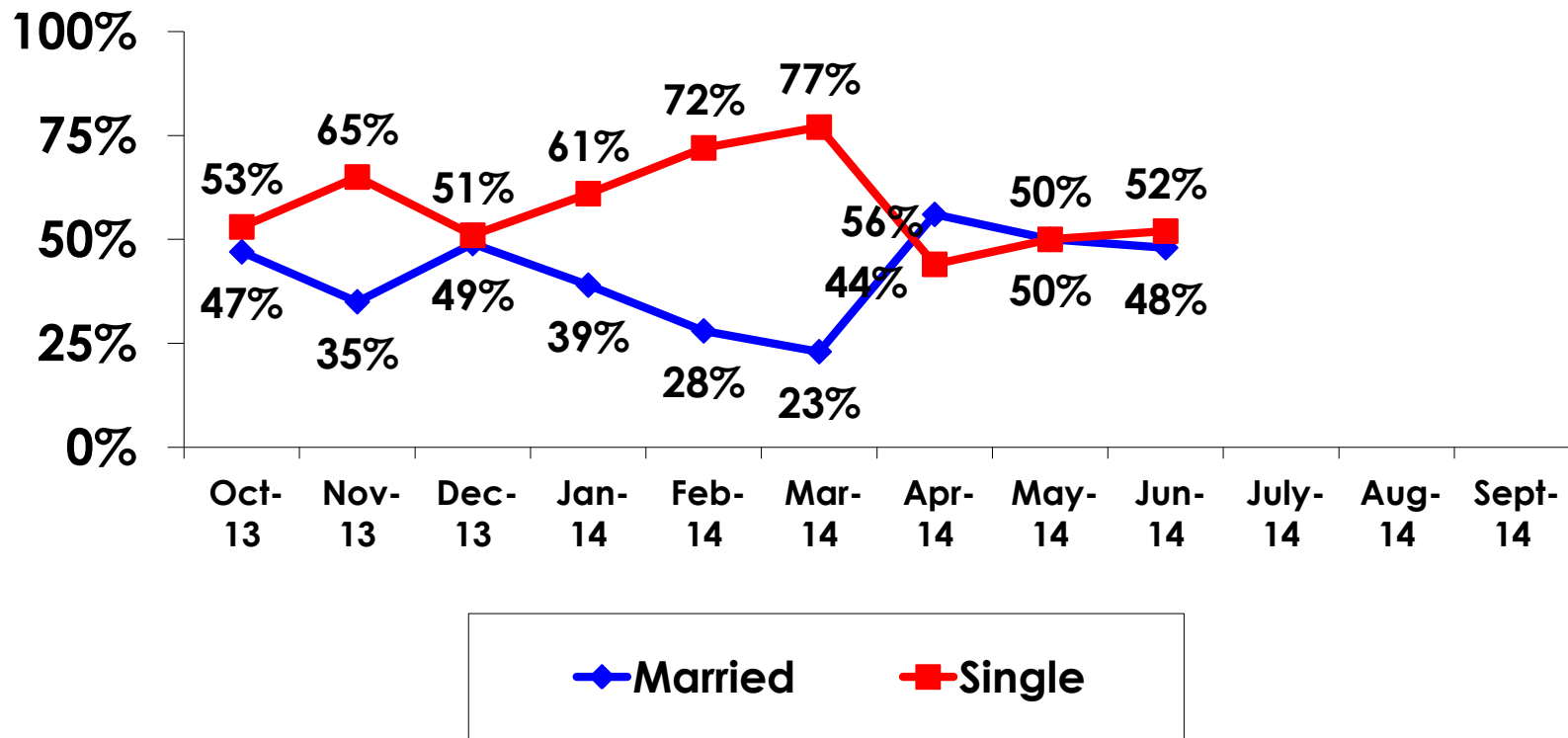
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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

# SECTION 1 **PROFILE OF RESPONDENTS**

# MARITAL STATUS - TRACKING

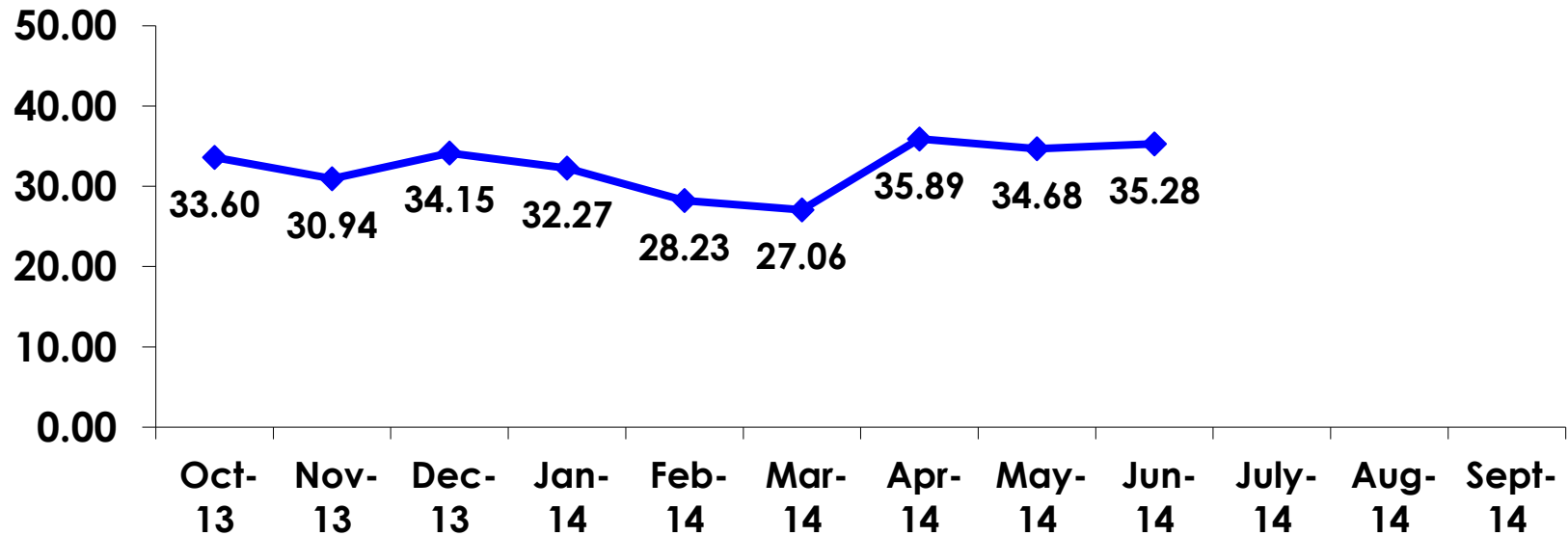


# MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	48%	88%	24%	31%	84%	89%	51%	28%	75%	98%	100%	53%
	Single	52%	12%	76%	69%	16%	11%	49%	72%	25%	2%		47%
	Total Count	350	141	54	16	31	18	103	212	96	42	24	172



# AVERAGE AGE - TRACKING



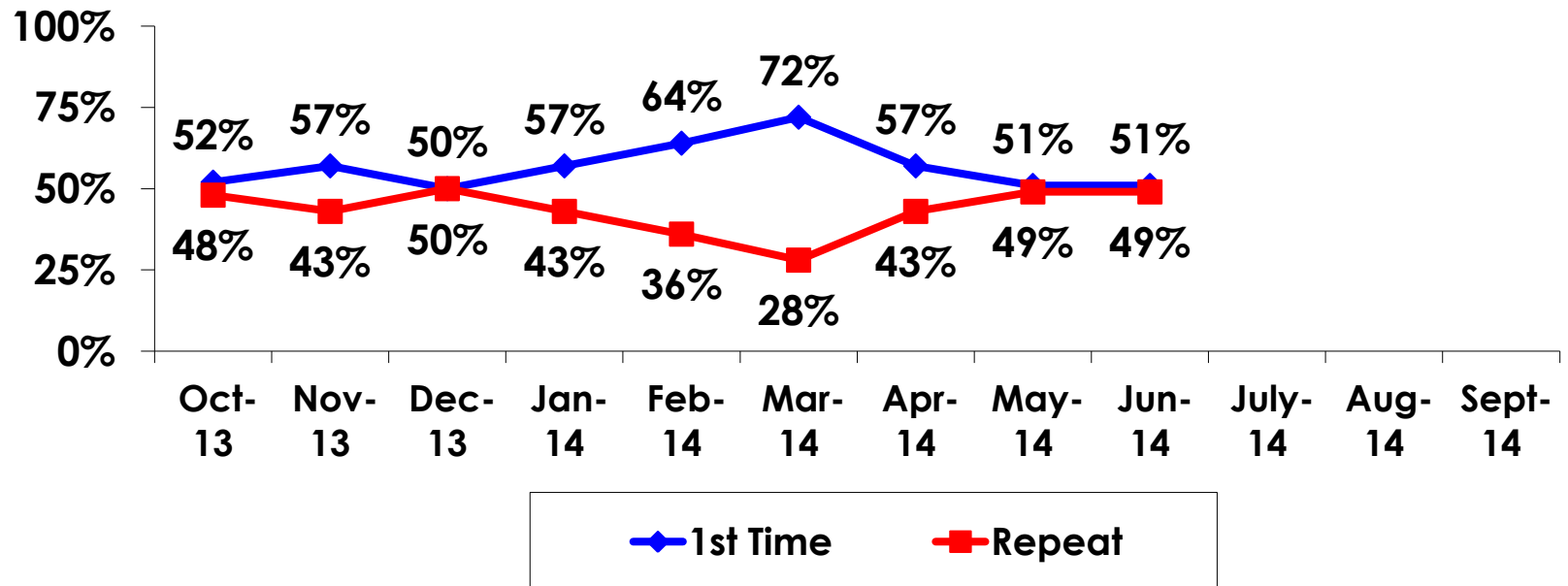
# AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	20%	9%	35%	13%		6%	25%	33%		2%	13%	14%
	25-34	39%	35%	41%	47%		56%	39%	64%		29%	75%	33%
	35-49	24%	32%	19%	33%		28%	19%	3%	82%	60%	13%	32%
	50+	16%	24%	6%	7%	100%	11%	16%		18%	10%		21%
	Total Count	349	140	54	15	31	18	104	213	96	42	24	171
QF	Mean	35.28	39.17	30.07	33.20	64.23	34.00	34.54	26.78	42.72	38.81	28.79	38.02
	Median	31	37	27	31	64	31	29	27	42	39	29	36

# INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q26	<Y2.0 million	6%	1%	10%	7%	3%	6%	8%	9%	1%	2%		5%	
	Y2.0M-Y3.0M	12%	4%	18%		10%	6%	11%	16%	3%	2%	4%	11%	
	Y3.0M-Y4.0M	14%	15%	14%		23%	6%	12%	13%	14%	10%	17%	14%	
	Y4.0M-Y5.0M	25%	22%	18%	47%	7%	22%	21%	26%	26%	19%	17%	23%	
	Y5.0M-Y7.0M	20%	29%	18%	20%	33%	39%	15%	15%	24%	40%	38%	23%	
	Y7.0M-Y10.0M	12%	14%	8%	13%	13%	11%	13%	10%	17%	14%	17%	13%	
	Y10.0M+	9%	12%	16%	7%	10%	11%	13%	7%	15%	12%	4%	11%	
	No Income	2%	2%		7%			6%	3%			4%	1%	
	Total	Count	338	138	51	15	30	18	99	204	95	42	24	168

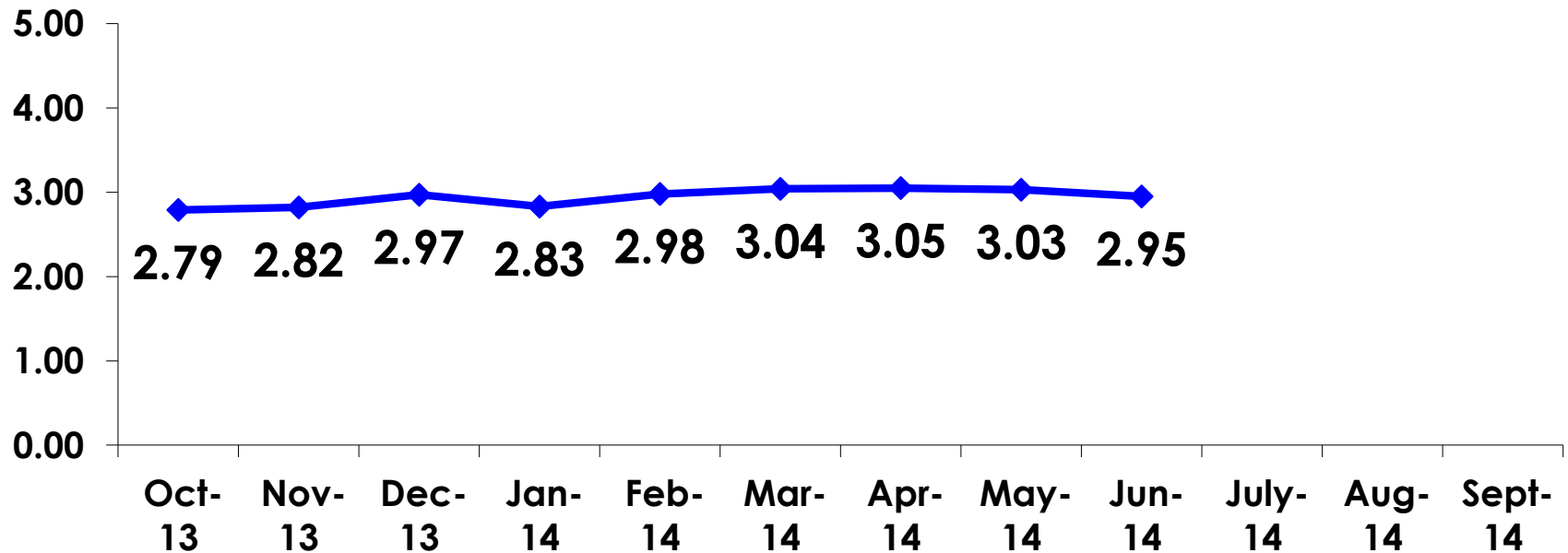
# PRIOR TRIPS TO GUAM - TRACKING



# PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q3A	Yes	51%	44%	57%	56%	42%	56%	54%	61%	32%	40%	75%		
	No	49%	56%	43%	44%	58%	44%	46%	39%	68%	60%	25%	100%	
	Total	Count	351	141	54	16	31	18	104	213	96	42	24	172

# 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	2.95	3.25	2.85	2.50	3.26	3.44	3.03	2.85	3.11	3.31	3.71	3.01
	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	52%	48%	63%		45%	33%	57%	61%	38%	45%	58%	51%	
	Full package tour	23%	30%	13%		35%	39%	23%	22%	22%	21%	38%	21%	
	Individually arranged travel (FIT)	9%	13%	9%		19%	11%	6%	4%	19%	24%	4%	13%	
	Company paid travel	9%	4%	11%				9%	7%	16%	5%		10%	
	Group tour	5%	2%	4%	100%		6%	4%	4%	5%	5%		4%	
	Other	2%	2%				11%	2%	2%	1%			1%	
	Total	Count	351	141	54	16	31	18	104	213	96	42	24	172

# TRAVEL MOTIVATION - SEGMENTATION

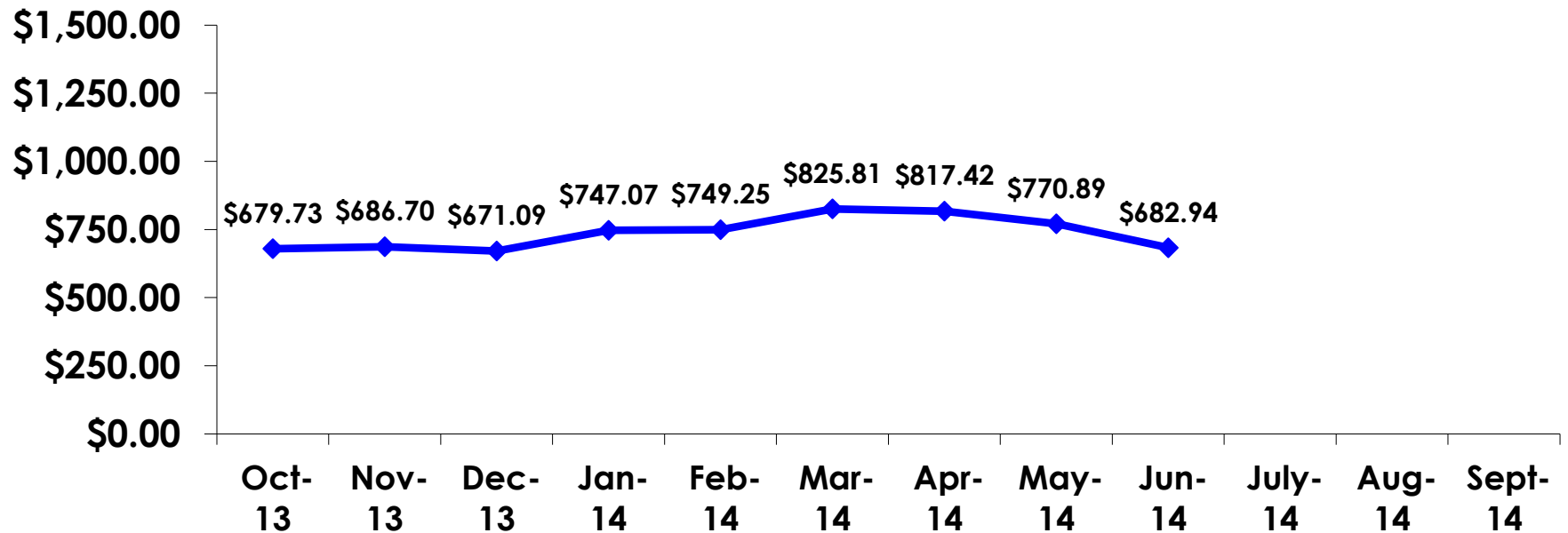
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	36%	45%	22%	19%	35%	33%	32%	30%	50%	52%	21%	73%	
	Price	22%	22%	24%		19%		24%	23%	23%	17%	25%	20%	
	Visit friends/ Relatives	2%	1%	4%		3%			1%	3%			3%	
	Recomm- friend/family/trvl agnt	19%	11%	22%	6%	29%		22%	23%	8%	10%	8%	13%	
	Scuba	4%	1%	2%				10%	5%	4%	2%		3%	
	Water sports	19%	18%	20%	6%	13%	6%	30%	20%	20%	12%	17%	20%	
	Short travel time	48%	51%	57%	13%	39%	28%	45%	51%	48%	55%	46%	50%	
	Golf	5%	5%	2%	6%	32%		6%	2%	3%	2%		6%	
	Relax	30%	31%	37%	6%	23%	17%	30%	31%	32%	38%	25%	33%	
	Company/ Business Trip	19%	9%	20%	81%	3%		18%	15%	28%	14%		18%	
	Company Sponsored	3%	3%	4%	13%			5%	3%	2%	5%		2%	
	Safe	25%	27%	26%	6%	26%	11%	23%	23%	27%	31%	21%	30%	
	Natural beauty	50%	47%	56%	13%	26%	28%	58%	55%	50%	48%	54%	51%	
	Shopping	30%	28%	52%	6%	23%	11%	28%	36%	24%	29%	17%	31%	
	Married/ Attn wedding	5%	12%		6%		100%	4%	6%	3%	10%	25%	5%	
	Honeymoon	7%	17%	2%			33%	8%	10%	2%	2%	100%	3%	
	Pleasure	44%	40%	54%		32%	17%	43%	49%	40%	43%	42%	40%	
	Organized sports	1%	2%	2%		10%		1%		1%			2%	
	Other	3%	5%	2%				4%	3%	3%	5%		4%	
	Total	Count	351	141	54	16	31	18	104	213	96	42	24	172

# INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	77%	82%	74%	73%	39%	78%	76%	85%	77%	86%	92%	73%	
	Travel Guidebook- Bookstore	48%	51%	54%	27%	23%	50%	48%	53%	48%	50%	50%	38%	
	Prior Trip	42%	49%	33%	27%	55%	39%	42%	34%	57%	55%	17%	85%	
	Travel Agent Brochure	38%	41%	44%	27%	35%	56%	39%	42%	28%	36%	63%	33%	
	Magazine (Consumer)	33%	36%	44%	20%	16%	33%	38%	40%	24%	33%	54%	28%	
	Friend/ Relative	29%	17%	30%	7%	10%	28%	32%	39%	14%	14%	25%	17%	
	TV	11%	11%	11%		10%	11%	11%	13%	7%	10%	4%	11%	
	Co-Worker/ Company Trvl Dept	5%	4%	11%	7%	3%	6%	3%	5%	4%	5%		3%	
	Consumer Trvl Show	2%	2%	2%				5%	2%	3%		4%	2%	
	GVB Office	1%	2%	2%		3%	6%	2%	0%	3%			2%	
	GVB Promo	1%	1%			6%		2%		2%			2%	
	Other	1%	2%			3%	6%			1%	2%		1%	
	Travel Trade Show	1%	1%					2%	1%	1%	2%		1%	
	Newspaper	1%						1%		2%			1%	
	Total	Count	350	141	54	15	31	18	104	213	96	42	24	172

# SECTION 3 **EXPENDITURES**

# PREPAID EXPENDITURES - TRACKING

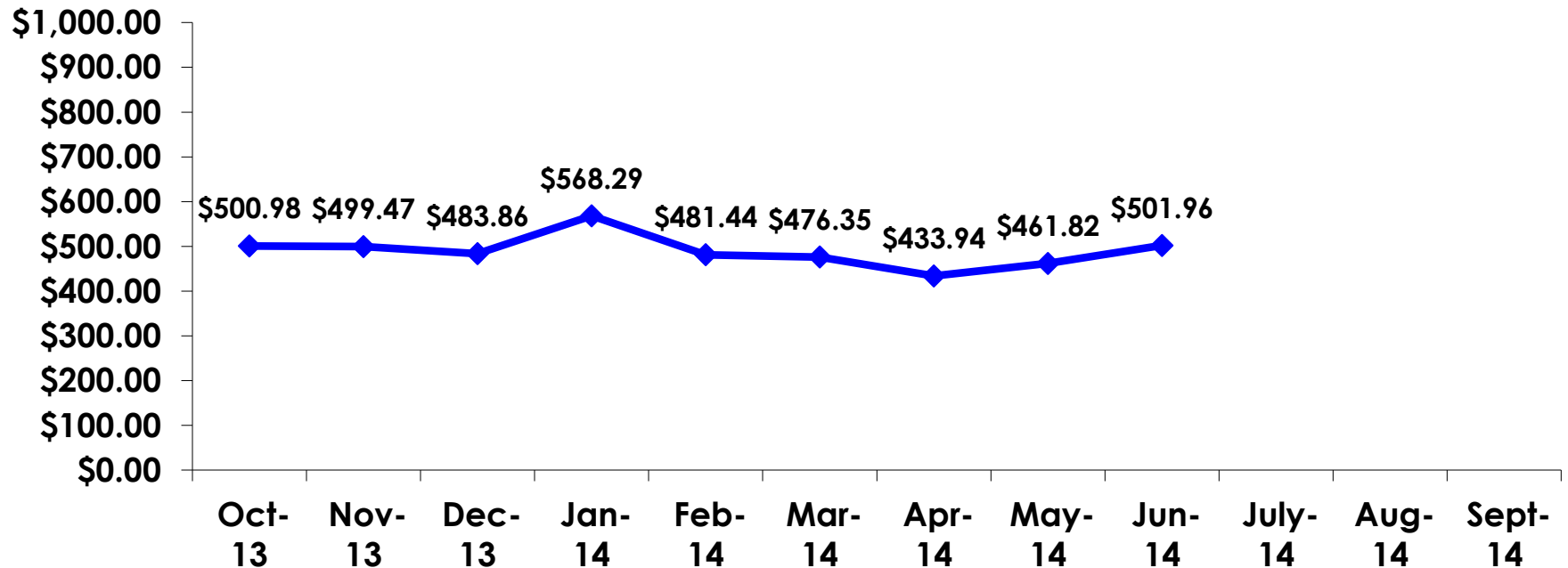


YTD=\$736.74

# 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	\$682.94	\$927.43	\$577.62	\$626.41	\$856.71	\$1,218.22	\$739.82	\$674.96	\$647.15	\$810.67	\$1,442.49	\$689.38
	Median	\$587	\$783	\$591	\$473	\$685	\$685	\$640	\$587	\$587	\$737	\$1,304	\$591
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,997	\$5,997	\$1,136	\$3,916	\$3,916	\$5,997	\$3,916	\$5,997	\$3,427	\$3,427	\$5,997	\$5,997

# ON-ISLAND EXPENDITURES - TRACKING



YTD = \$489.79

# ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

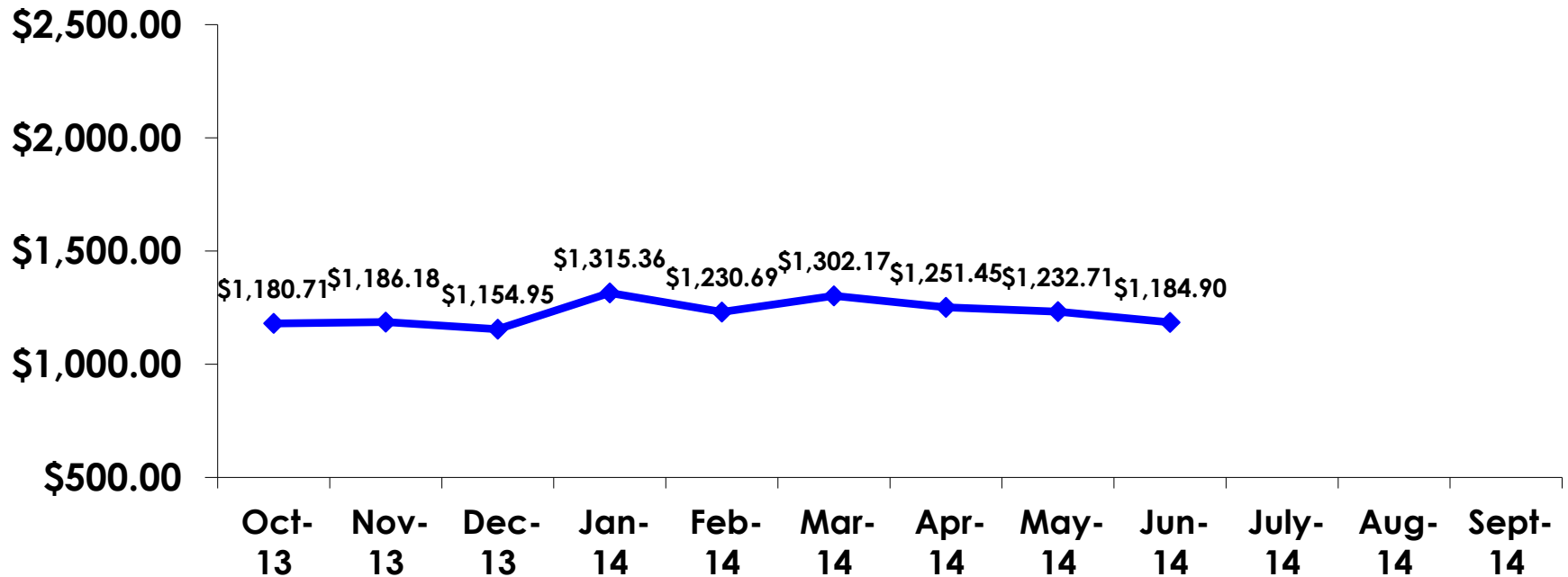
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$501.96	\$511.28	\$456.77	\$419.79	\$604.98	\$563.66	\$530.22	\$509.97	\$473.45	\$443.86	\$588.79	\$514.70
	Median	\$400	\$350	\$358	\$500	\$450	\$367	\$421	\$400	\$350	\$283	\$435	\$360
	Minimum	\$0	\$0	\$0	\$100	\$150	\$100	\$0	\$0	\$0	\$0	\$100	\$0
	Maximum	\$2,500	\$2,500	\$1,500	\$800	\$2,000	\$2,000	\$2,000	\$2,500	\$2,500	\$2,500	\$2,000	\$2,500



# 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	\$41.30	\$68.98	\$17.50	\$9.69	\$95.81	\$117.78	\$58.63	\$33.63	\$42.48	\$48.83	\$92.50	\$52.26
	Median	\$0	\$0	\$0	\$0	\$10	\$5	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$27.83	\$35.13	\$16.28	\$14.69	\$36.84	\$41.11	\$32.10	\$26.63	\$28.93	\$26.67	\$62.00	\$29.03
	Median	\$9	\$14	\$9	\$0	\$9	\$25	\$13	\$7	\$10	\$0	\$50	\$10
F&B RESTRNT	Mean	\$86.45	\$131.33	\$49.74	\$21.88	\$74.65	\$199.17	\$95.58	\$77.33	\$118.26	\$153.10	\$222.08	\$111.28
	Median	\$17	\$40	\$21	\$0	\$17	\$50	\$30	\$20	\$22	\$53	\$75	\$25
OPT TOUR	Mean	\$81.87	\$105.69	\$38.04	\$5.00	\$187.42	\$63.33	\$130.91	\$61.76	\$92.30	\$83.02	\$95.83	\$71.60
	Median	\$0	\$0	\$0	\$0	\$100	\$0	\$55	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$163.68	\$208.94	\$146.37	\$50.00	\$111.45	\$268.61	\$214.14	\$176.66	\$162.67	\$204.40	\$302.92	\$178.87
	Median	\$50	\$80	\$50	\$0	\$0	\$155	\$65	\$50	\$50	\$50	\$150	\$20
GIFT- OTHER	Mean	\$138.77	\$165.00	\$130.19	\$59.38	\$131.29	\$186.39	\$141.78	\$134.63	\$142.38	\$142.50	\$232.50	\$147.44
	Median	\$72	\$100	\$100	\$0	\$100	\$105	\$65	\$70	\$90	\$100	\$125	\$55
TRANS	Mean	\$19.80	\$32.74	\$14.41	\$12.50	\$4.13	\$45.00	\$21.30	\$16.20	\$34.39	\$72.31	\$16.42	\$24.26
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$207.10	\$274.31	\$116.50	\$430.00	\$267.90	\$61.94	\$165.04	\$179.77	\$248.18	\$392.48	\$186.67	\$227.01
	Median	\$0	\$0	\$0	\$160	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$772.65	\$1,038.79	\$524.15	\$603.13	\$996.58	\$983.33	\$865.24	\$705.24	\$865.93	\$1,138.31	\$1,210.92	\$851.76
	Median	\$505	\$800	\$400	\$500	\$676	\$825	\$600	\$500	\$658	\$855	\$950	\$653

# TOTAL EXPENDITURES – TRACKING



YTD=\$1,226.56

# 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	\$1,184.90	\$1,438.71	\$1,034.39	\$1,046.20	\$1,461.69	\$1,781.88	\$1,270.04	\$1,184.93	\$1,120.61	\$1,254.53	\$2,031.28	\$1,204.08
	Median	\$1,079	\$1,192	\$1,083	\$779	\$1,185	\$1,088	\$1,156	\$1,062	\$1,007	\$1,003	\$1,799	\$1,073
	Minimum	\$0	\$0	\$0	\$330	\$235	\$150	\$0	\$0	\$0	\$167	\$100	\$0
	Maximum	\$7,997	\$7,997	\$2,479	\$4,086	\$4,166	\$7,997	\$4,916	\$7,997	\$3,727	\$3,805	\$7,997	\$7,997

# 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 2014, and Overall Oct-2013 - June 2014**

	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	<b>Jun-14</b>	Combi ned Oct- 2013 - Jun 2014
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	<b>rank</b>	rank
Quality & Cleanliness of beaches & parks			3	4	2	1		4	<b>5</b>	4
Ease of getting around								3	<b>1</b>	10
Safety walking around at night										
Quality of daytime tours	2			3		4		6	<b>4</b>	
Variety of daytime tours										6
Quality of nighttime tours										
Variety of nighttime tours										
Quality of shopping	4		5				1		<b>6</b>	3
Variety of shopping				1						
Price of things on Guam				5	4	2		5		14
Quality of hotel accommodations			2		3					5
Quality/cleanliness of air, sky	3	4			5					7
Quality/cleanliness of parks						5				9
Quality of landscape in Tumon	1	2								
Quality of landscape in Guam			1	2	1	3	3	1	<b>2</b>	1
Quality of ground handler		1					2			8
Quality/cleanliness of transportation vehicles		3	4				4	2	<b>3</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%	<b>45.0%</b>	46.1%

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 six significant factors in the June 2014 Period. By rank order they are:
  - **Ease of getting around,**
  - **Quality of landscape in Guam,**
  - **Quality/cleanliness of transportation vehicles,**
  - **Quality of day time tours,**
  - **Quality & cleanliness of beaches & parks, and**
  - **Quality of shopping.**
- With all six factors the overall  $r^2$  is .45 meaning that **45% 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 2014 and Overall Oct-2013-Jun 2014**

	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	<b>Jun-14</b>	Combi ned Oct- 2013- Jun 2014
Drivers:	rank	rank	rank	rank	rank	rank	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										2
Quality of shopping									<b>1</b>	1
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								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%	<b>3.5%</b>	1.3%

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 one significant factor in the June 2014 Period. That factor is:
  - **Quality of shopping.**
- With this factor, the overall  $r^2$  is .035 meaning that **3.5% of per person on island expenditure is accounted for by this factor.**