



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2014 Market Segmentation

SEPTEMBER 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.

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.

Highlighted Segments Parameters

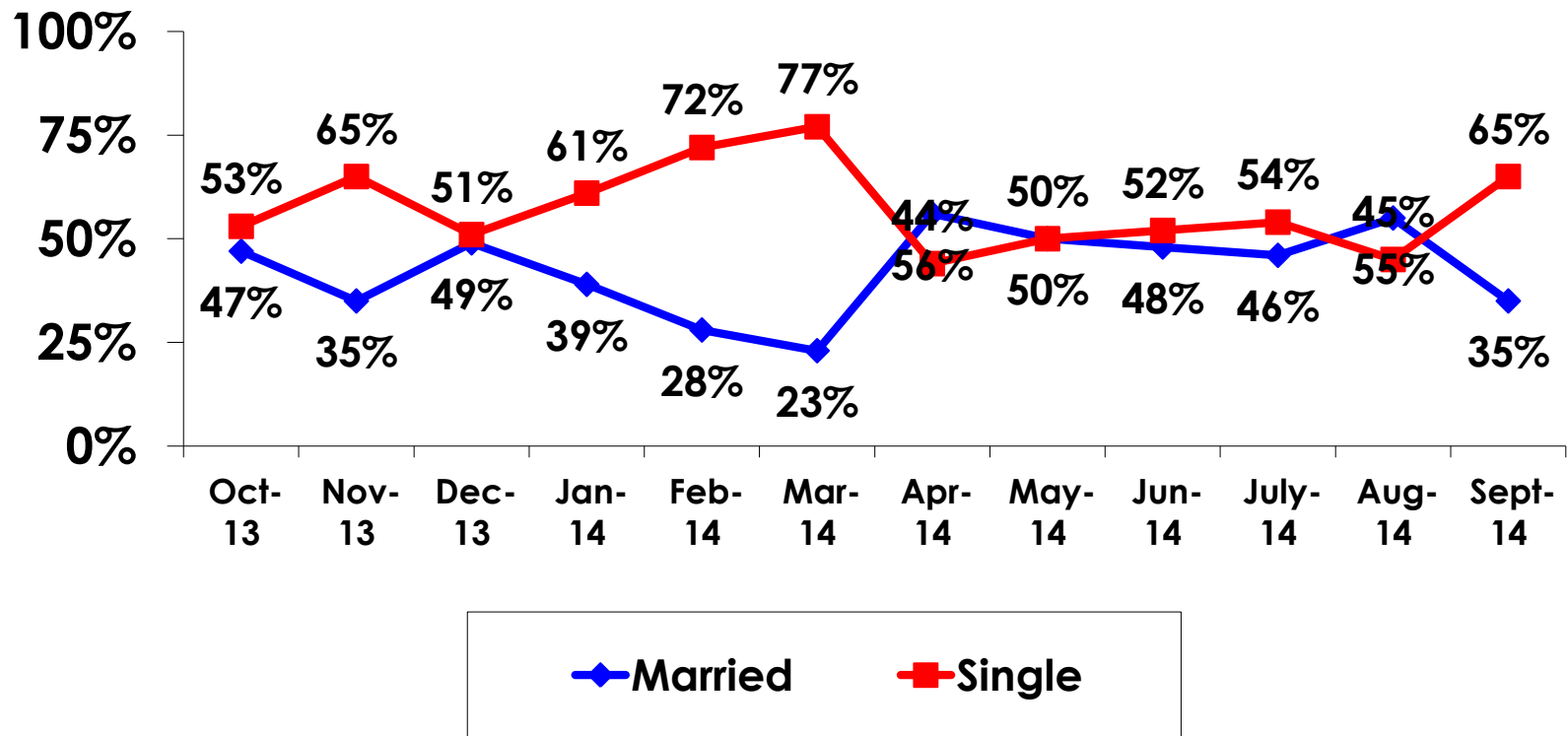
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%	36%	25%	24%	52%	46%	40%	39%	56%	34%
Office Lady	13%	12%	10%	15%	6%	5%	6%	14%	15%	15%	9%	14%
Group	6%	5%	4%	3%	5%	6%	5%	9%	5%	6%	1%	2%
Silver	2%	2%	4%	3%	1%	1%	5%	7%	9%	5%	2%	1%
Wedding	8%	6%	4%	5%	3%	3%	5%	10%	5%	5%	1%	2%
Sport	35%	40%	42%	35%	41%	43%	38%	33%	30%	27%	38%	36%
18-35	64%	71%	61%	67%	78%	79%	50%	64%	61%	62%	52%	75%
36-55	29%	24%	32%	27%	19%	19%	42%	26%	27%	29%	44%	21%
Child	15%	9%	22%	14%	11%	13%	28%	11%	12%	13%	41%	10%
Honeymoon	4%	3%	5%	2%	3%	1%	5%	5%	7%	4%	1%	2%
Repeat	48%	43%	50%	43%	36%	28%	43%	49%	49%	54%	51%	37%
TOTAL	351	350	350	350	351	351	350	350	351	351	352	351

SECTION 1 **PROFILE OF RESPONDENTS**

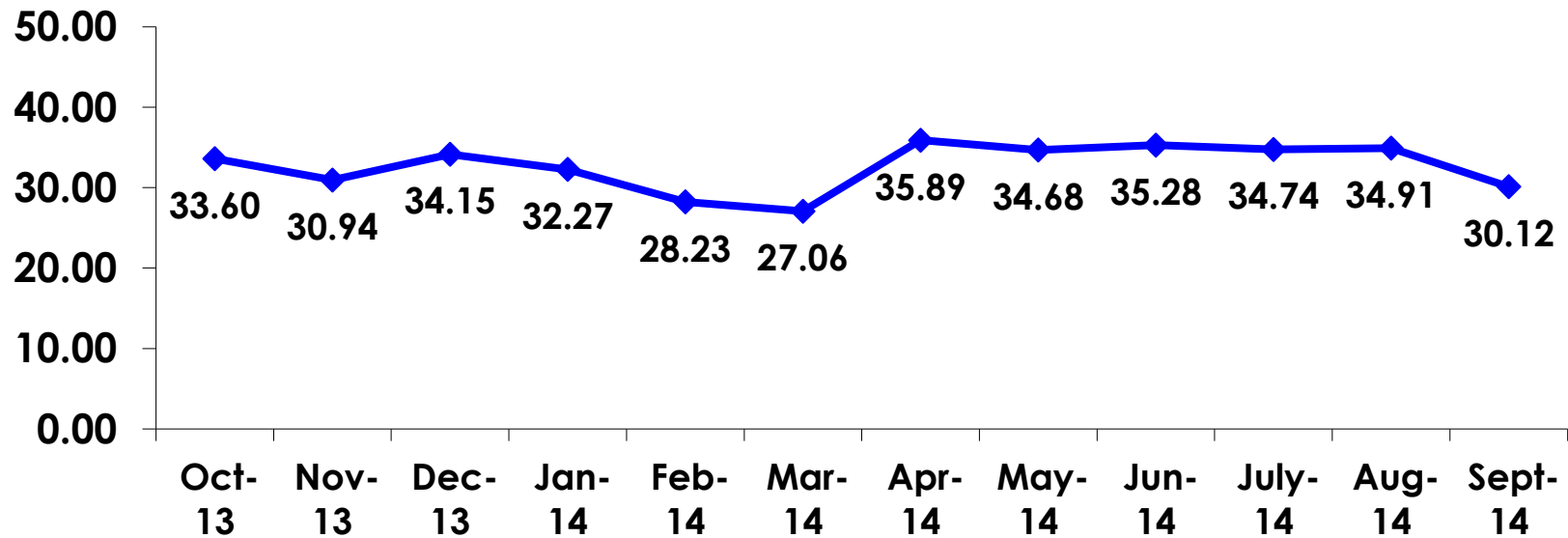
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	35%	86%	16%	63%	80%	67%	28%	17%	89%	97%	100%	43%
	Single	65%	14%	84%	38%	20%	33%	72%	83%	11%	3%		57%
	Total Count	351	118	50	8	5	6	125	264	75	34	7	129

AVERAGE AGE - TRACKING



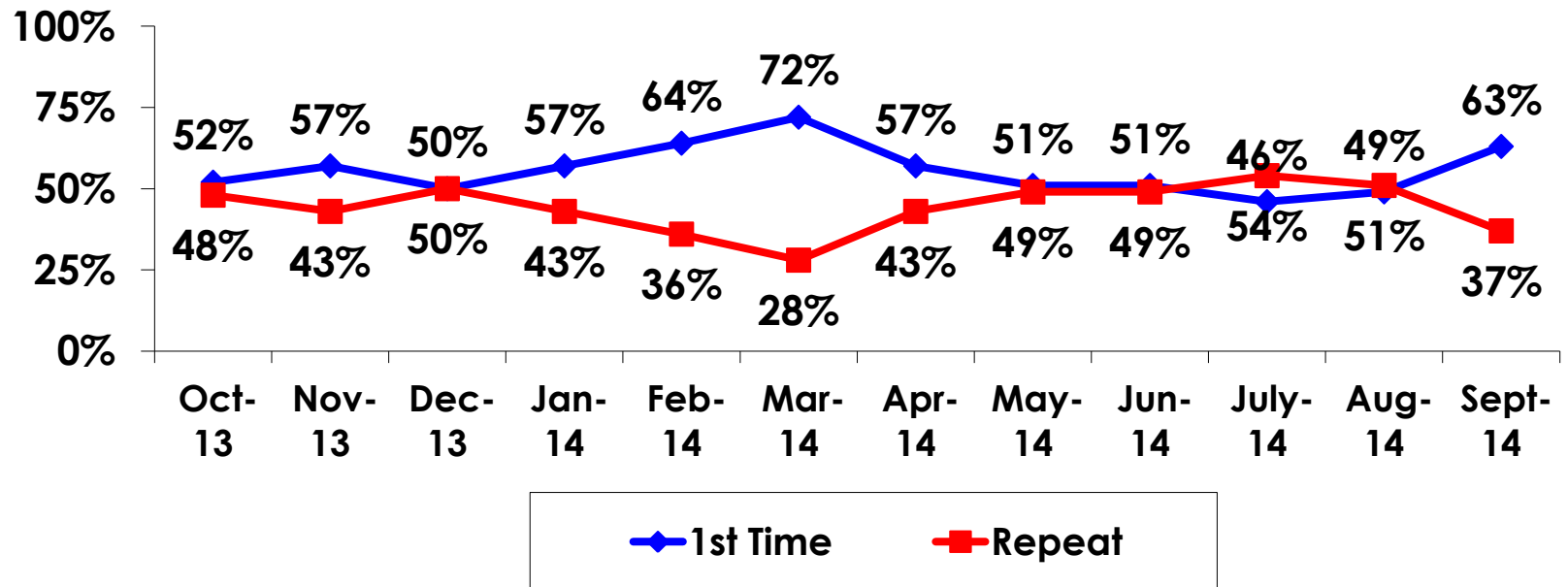
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	41%	5%	35%	38%		33%	40%	54%				30%
	25-34	32%	30%	45%	38%			37%	42%		18%	43%	27%
	35-49	19%	43%	18%	25%		50%	16%	4%	73%	70%	57%	30%
	50+	8%	21%	2%		100%	17%	7%		27%	12%		14%
	Total	Count	347	115	49	8	5	6	124	264	75	33	7
QF	Mean	30.12	39.91	28.43	28.00	62.80	37.17	29.40	24.76	44.81	42.27	33.86	34.10
	Median	26	39	26	26	62	38	26	24	44	42	36	30

INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q26	<Y2.0 million	5%	1%	2%				6%	7%			14%	6%	
	Y2.0M-Y3.0M	10%	3%	24%	25%	40%		11%	12%				10%	
	Y3.0M-Y4.0M	12%	6%	26%	13%		20%	14%	15%	6%		29%	11%	
	Y4.0M-Y5.0M	16%	13%	11%		20%	40%	16%	18%	10%	10%	14%	16%	
	Y5.0M-Y7.0M	18%	29%	9%	25%	20%		16%	15%	24%	26%	14%	13%	
	Y7.0M-Y10.0M	15%	22%	11%	13%			13%	13%	24%	26%	14%	19%	
	Y10.0M+	18%	26%	17%	13%		40%	16%	13%	36%	39%	14%	24%	
	No Income	5%	1%		13%	20%		7%	7%				2%	
	Total	Count	314	112	46	8	5	5	111	234	70	31	7	122

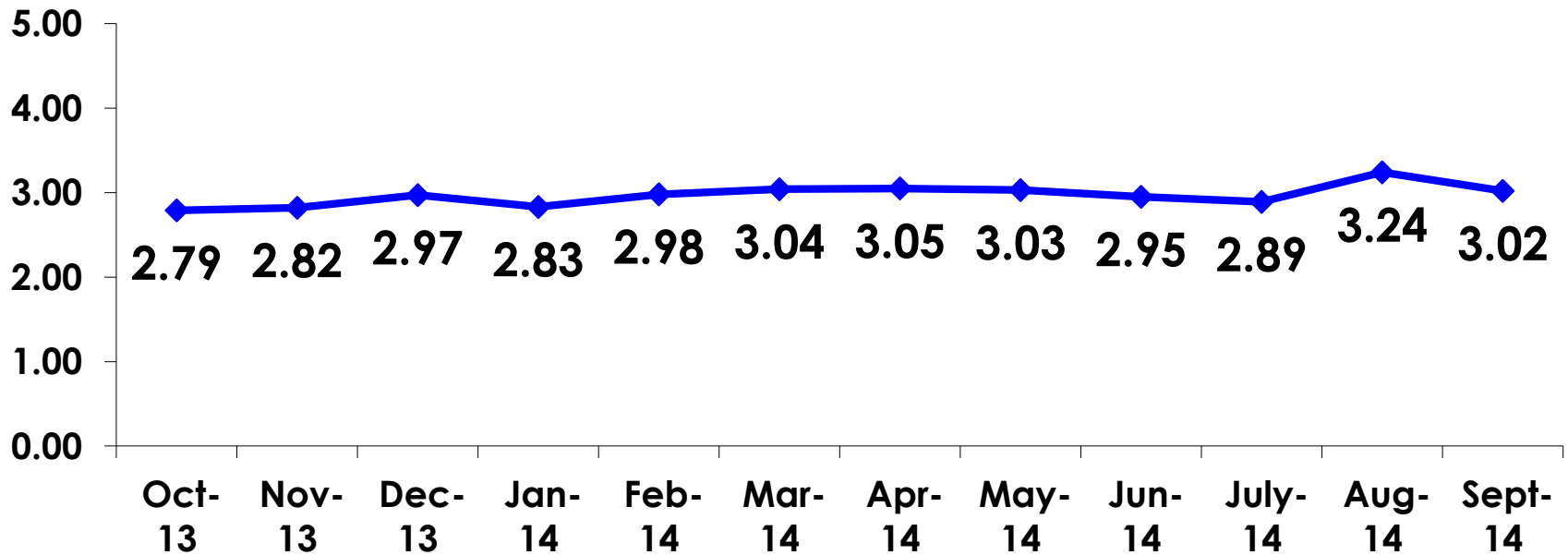
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	63%	51%	59%	88%	60%	67%	67%	72%	32%	41%	86%	
	No	37%	49%	41%	13%	40%	33%	33%	28%	68%	59%	14%	100%
	Total Count	350	118	49	8	5	6	124	263	75	34	7	129

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	3.02	3.31	2.86	2.75	3.80	3.00	3.13	2.87	3.49	3.94	3.57	3.09
Median	3	3	3	3	4	3	3	3	3	4	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%	57%	60%		60%	67%	69%	66%	55%	44%	57%	59%	
	Full package tour	23%	30%	20%		40%	17%	24%	23%	20%	24%	43%	22%	
	Individually arranged travel (FIT)	10%	13%	8%			17%	6%	7%	22%	32%		18%	
	Group tour	2%		8%	100%				3%	1%			1%	
	Company paid travel	1%		4%				1%	1%	1%				
	Total	Count	348	117	50	8	5	6	125	263	74	34	7	129

TRAVEL MOTIVATION - SEGMENTATION

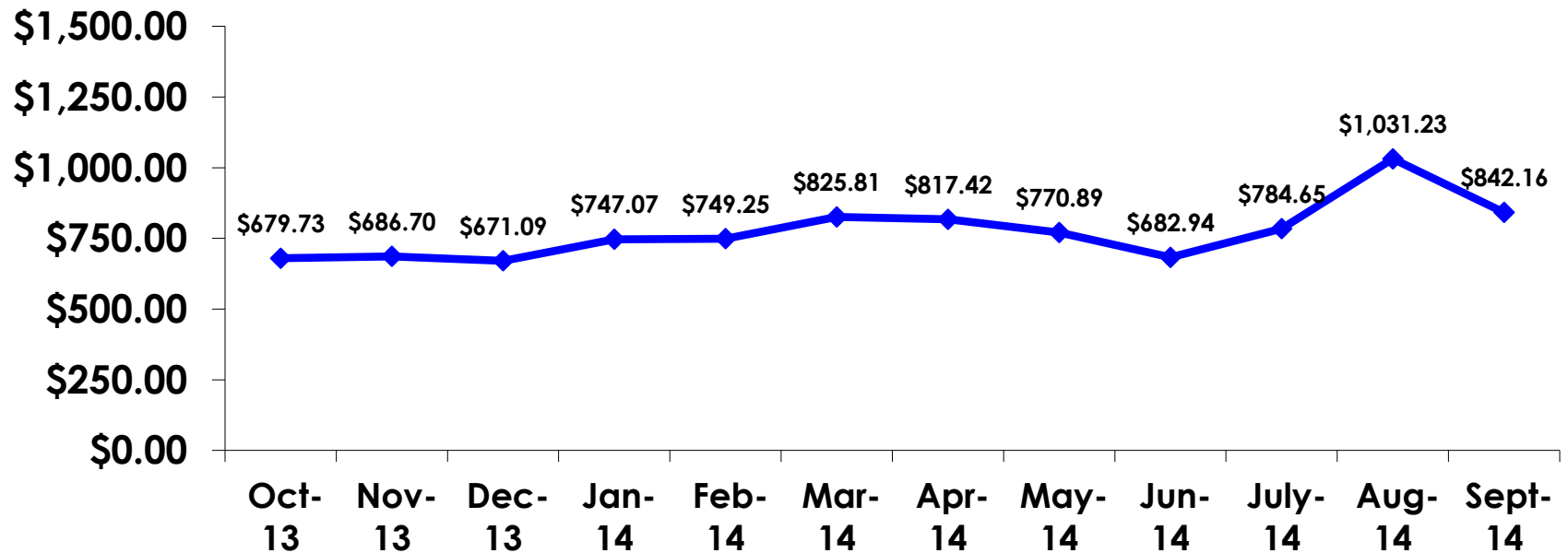
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	28%	41%	31%	13%	20%	17%	24%	20%	59%	56%		76%	
	Price	22%	24%	10%		40%		27%	22%	17%	21%	14%	21%	
	Visit friends/ Relatives	1%	1%					1%	1%	3%				
	Recomm- friend/family/trvl agnt	24%	15%	18%		20%		23%	29%	11%	15%		14%	
	Scuba	4%	4%				17%	9%	4%	4%	6%		3%	
	Water sports	21%	15%	20%	13%	20%		37%	22%	16%	24%		19%	
	Short travel time	55%	71%	57%	13%	100%		54%	49%	71%	79%	71%	60%	
	Golf	2%	5%					2%	0%	8%	3%		5%	
	Relax	37%	42%	53%		40%		41%	34%	45%	44%		47%	
	Company/ Business Trip	3%		10%	75%			1%	3%	4%			1%	
	Company Sponsored	1%	1%	2%	13%			1%	0%	3%	3%		1%	
	Safe	23%	25%	22%		80%		24%	19%	31%	29%	14%	28%	
	Natural beauty	66%	57%	69%	25%	20%	17%	72%	69%	57%	62%	29%	60%	
	Shopping	34%	30%	57%	25%	20%		33%	33%	37%	38%	14%	37%	
	Married/ Attn wedding	2%	3%				100%	1%	1%	4%	3%		2%	
	Honeymoon	2%	6%					2%	1%	5%		100%	1%	
	Pleasure	51%	47%	63%	25%	60%		55%	49%	57%	59%		57%	
	Organized sports	1%						1%	1%				1%	
	Other	2%	3%					2%	1%	4%			2%	
	Total	Count	350	118	49	8	5	6	125	263	75	34	7	129

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	82%	79%	78%	50%	20%	83%	89%	81%	87%	82%	71%	81%	
	Travel Guidebook- Bookstore	55%	47%	48%	38%	60%	33%	58%	57%	49%	47%	43%	55%	
	Travel Agent Brochure	42%	43%	48%	38%	60%	33%	44%	44%	33%	29%	71%	37%	
	Magazine (Consumer)	38%	41%	30%	13%		17%	40%	36%	47%	38%	29%	36%	
	Friend/ Relative	31%	22%	40%	13%	40%	50%	31%	35%	16%	24%	14%	18%	
	Prior Trip	31%	44%	34%		20%	33%	27%	21%	63%	56%	14%	83%	
	TV	9%	7%	6%	25%		17%	8%	10%	5%	3%		8%	
	Co-Worker/ Company Trvl Dept	4%	3%	10%	38%			4%	5%	3%	6%		2%	
	Consumer Trvl Show	1%	1%					1%	1%					
	GVB Office	1%	2%					1%	0%	1%	3%		1%	
	Newspaper	1%							1%				1%	
	Other	0%	1%							1%	3%		1%	
	Travel Trade Show	0%	1%					1%		1%				
	GVB Promo	0%	1%					1%	0%					
	Total	Count	349	117	50	8	5	6	125	263	75	34	7	129

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING

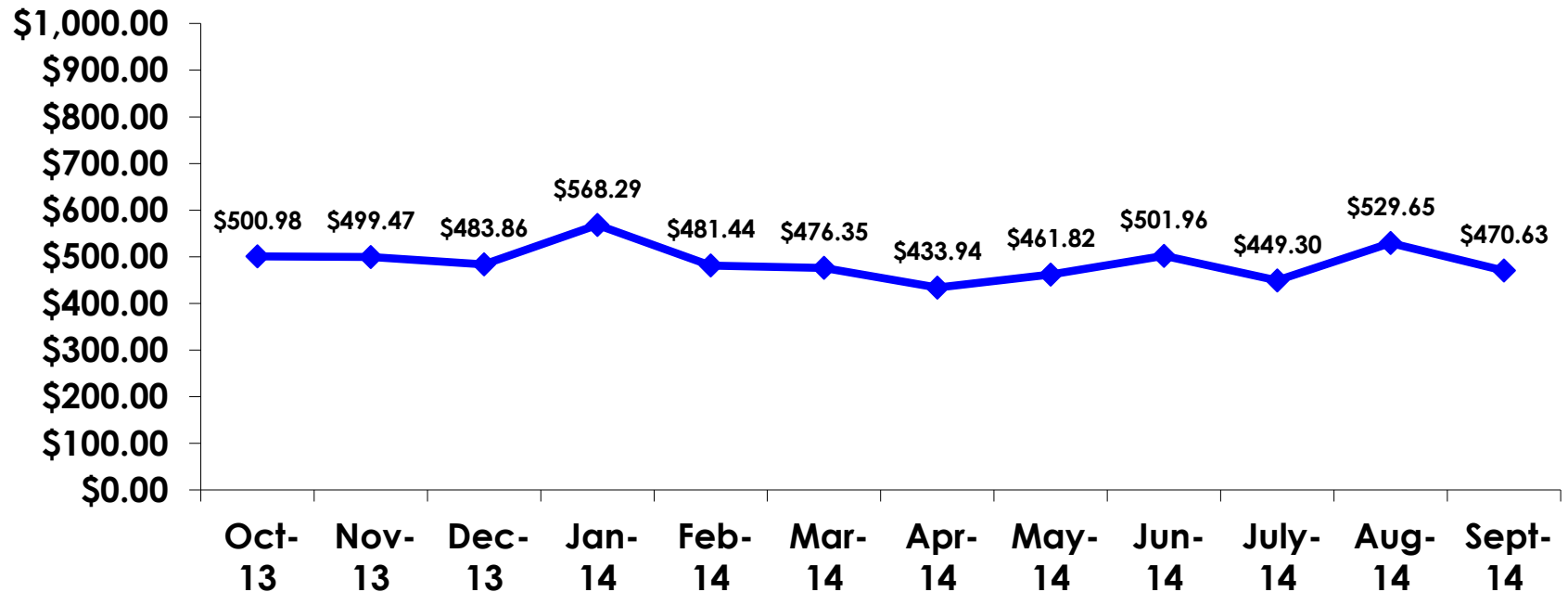


YTD=\$774.17

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	\$842.16	\$887.20	\$756.63	\$397.98	\$914.09	\$690.61	\$978.59	\$836.55	\$857.09	\$791.00	\$856.15	\$870.27
	Median	\$843	\$936	\$936	\$375	\$936	\$784	\$936	\$777	\$936	\$936	\$890	\$843
	Minimum	\$0	\$0	\$0	\$0	\$258	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$7,491	\$4,345	\$1,935	\$1,124	\$1,356	\$1,171	\$7,491	\$7,491	\$2,341	\$1,405	\$1,405	\$4,345

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$488.15

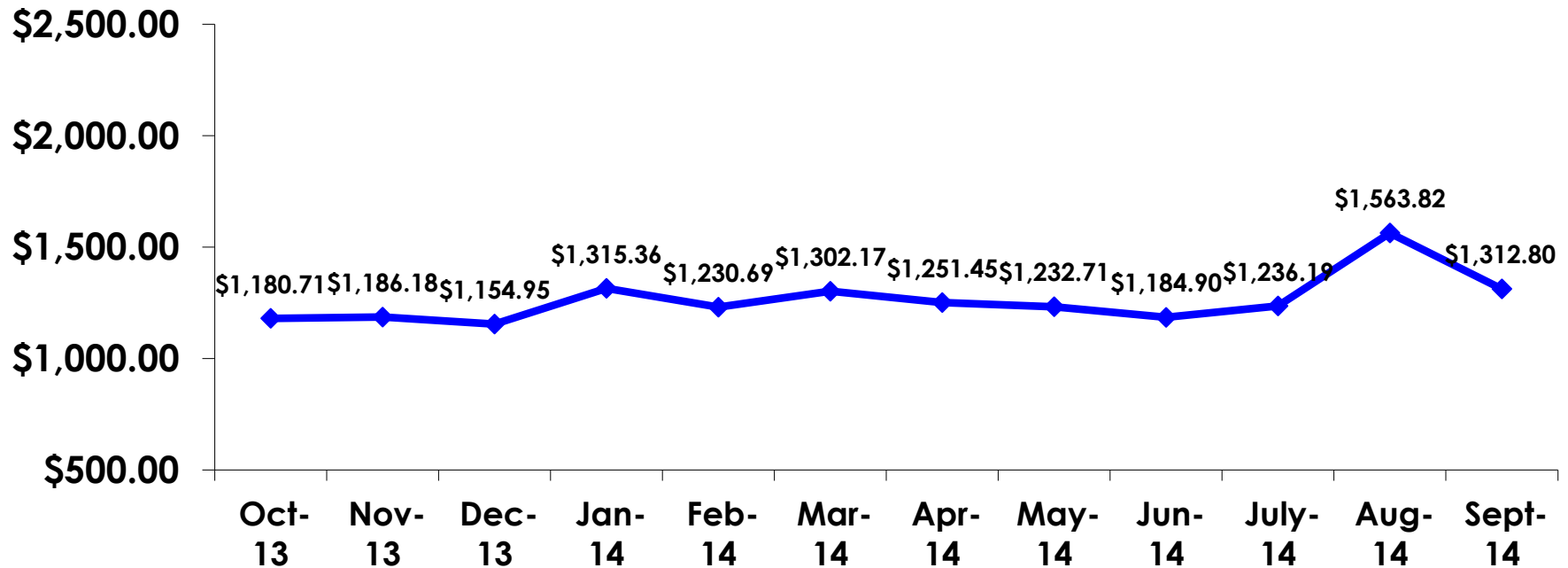
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$470.63	\$408.84	\$531.50	\$361.25	\$229.00	\$504.17	\$483.98	\$462.42	\$531.77	\$469.94	\$434.86	\$534.07
	Median	\$380	\$300	\$360	\$400	\$250	\$500	\$400	\$400	\$350	\$313	\$465	\$400
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$4,000	\$1,667	\$4,000	\$500	\$500	\$1,250	\$2,000	\$3,000	\$4,000	\$1,667	\$1,000	\$4,000

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	\$35.87	\$70.99	\$19.18	\$1.25	\$52.00	\$8.33	\$29.66	\$21.41	\$89.04	\$163.53	\$42.86	\$49.57
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$20	\$0
F&B FF/STORE	Mean	\$31.73	\$42.12	\$20.16	\$31.25	\$12.00	\$12.50	\$35.07	\$28.92	\$40.03	\$62.65	\$11.71	\$42.87
	Median	\$9	\$20	\$0	\$10	\$0	\$0	\$10	\$8	\$10	\$25	\$0	\$5
F&B RESTRNT	Mean	\$91.28	\$154.21	\$62.22	\$16.25	\$52.00	\$291.67	\$111.74	\$69.66	\$170.47	\$166.76	\$185.71	\$105.16
	Median	\$40	\$100	\$30	\$0	\$70	\$50	\$50	\$20	\$120	\$200	\$140	\$50
OPT TOUR	Mean	\$79.30	\$95.64	\$72.36	\$29.88	\$32.00	\$63.33	\$104.17	\$64.85	\$133.95	\$108.24	\$74.29	\$87.31
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$60	\$0	\$0	\$0	\$60	\$0
GIFT- SELF	Mean	\$213.64	\$264.60	\$296.10	\$73.13	\$46.00	\$583.33	\$211.95	\$165.01	\$392.61	\$442.94	\$158.57	\$306.61
	Median	\$50	\$30	\$75	\$45	\$30	\$100	\$50	\$50	\$60	\$100	\$170	\$75
GIFT- OTHER	Mean	\$90.52	\$130.51	\$98.34	\$68.75	\$78.00	\$126.67	\$93.79	\$82.11	\$121.13	\$176.47	\$142.86	\$99.93
	Median	\$50	\$100	\$50	\$25	\$60	\$80	\$60	\$50	\$80	\$100	\$100	\$50
TRANS	Mean	\$14.13	\$19.92	\$6.08	\$6.25	\$8.00	\$5.00	\$17.38	\$12.37	\$20.73	\$27.15	\$32.29	\$18.15
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$157.29	\$226.56	\$42.62	\$134.50	\$74.00	\$333.33	\$90.74	\$135.06	\$242.47	\$395.71	\$78.57	\$149.08
	Median	\$0	\$0	\$0	\$13	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$713.92	\$1,005.39	\$617.06	\$361.25	\$354.00	\$1,424.17	\$696.14	\$579.20	\$1,211.76	\$1,543.44	\$726.86	\$858.80
	Median	\$500	\$700	\$400	\$400	\$500	\$523	\$500	\$413	\$800	\$1,000	\$930	\$550

TOTAL EXPENDITURES – TRACKING



YTD=\$1,262.71

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	\$1,312.80	\$1,296.05	\$1,288.13	\$759.23	\$1,143.09	\$1,194.77	\$1,462.57	\$1,298.97	\$1,388.87	\$1,260.93	\$1,291.01	\$1,404.34
	Median	\$1,236	\$1,267	\$1,186	\$592	\$936	\$1,212	\$1,374	\$1,190	\$1,336	\$1,213	\$1,261	\$1,280
	Minimum	\$0	\$0	\$0	\$375	\$508	\$270	\$281	\$0	\$0	\$0	\$0	\$0
	Maximum	\$7,771	\$4,645	\$5,217	\$1,524	\$1,856	\$2,069	\$7,771	\$7,771	\$5,217	\$2,605	\$2,217	\$5,217

SECTION 4 **ADVANCED STATISTICS**

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 - Sep 2014													
	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Combi ned Oct- 2013 - Sep 2014
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks			3	4	2	1		4	5	3	4	2	3
Ease of getting around								3	1				12
Safety walking around at night													
Quality of daytime tours	2			3		4		6	4				
Variety of daytime tours										3			6
Quality of nighttime tours													
Variety of nighttime tours													10
Quality of shopping	4		5				1		6		2		4
Variety of shopping				1						4			
Price of things on Guam				5	4	2		5				4	
Quality of hotel accommodations			2		3					2			5
Quality/cleanliness of air, sky	3	4			5						6		7
Quality/cleanliness of parks						5					7		9
Quality of landscape in Tumon	1	2											11
Quality of landscape in Guam			1	2	1	3	3	1	2	1	5	3	1
Quality of ground handler		1					2					1	8
Quality/cleanliness of transportation vehicles		3	4				4	2	3		1		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%	59.4%	41.8%	47.2%

NOTE: Only significant drivers are included.

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by four significant factors in the September 2014 Period. By rank order they are:
 - **Quality of ground handler,**
 - **Quality & cleanliness of beaches & parks,**
 - **Quality of landscape in Guam, and**
 - **Price of things in Guam.**
- With all four factors the overall r^2 is .418 meaning that **41.8% 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, Sep 2014 and Overall Oct-2013-Sep 2014

	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Combi ned Oct- 2013- Sep 2014
Drivers:	rank	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%	0.0%	0.0%	1.0%

NOTE: Only significant drivers are included.

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 September 2014 Period.