



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015 Market Segmentation

APRIL 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 **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.

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

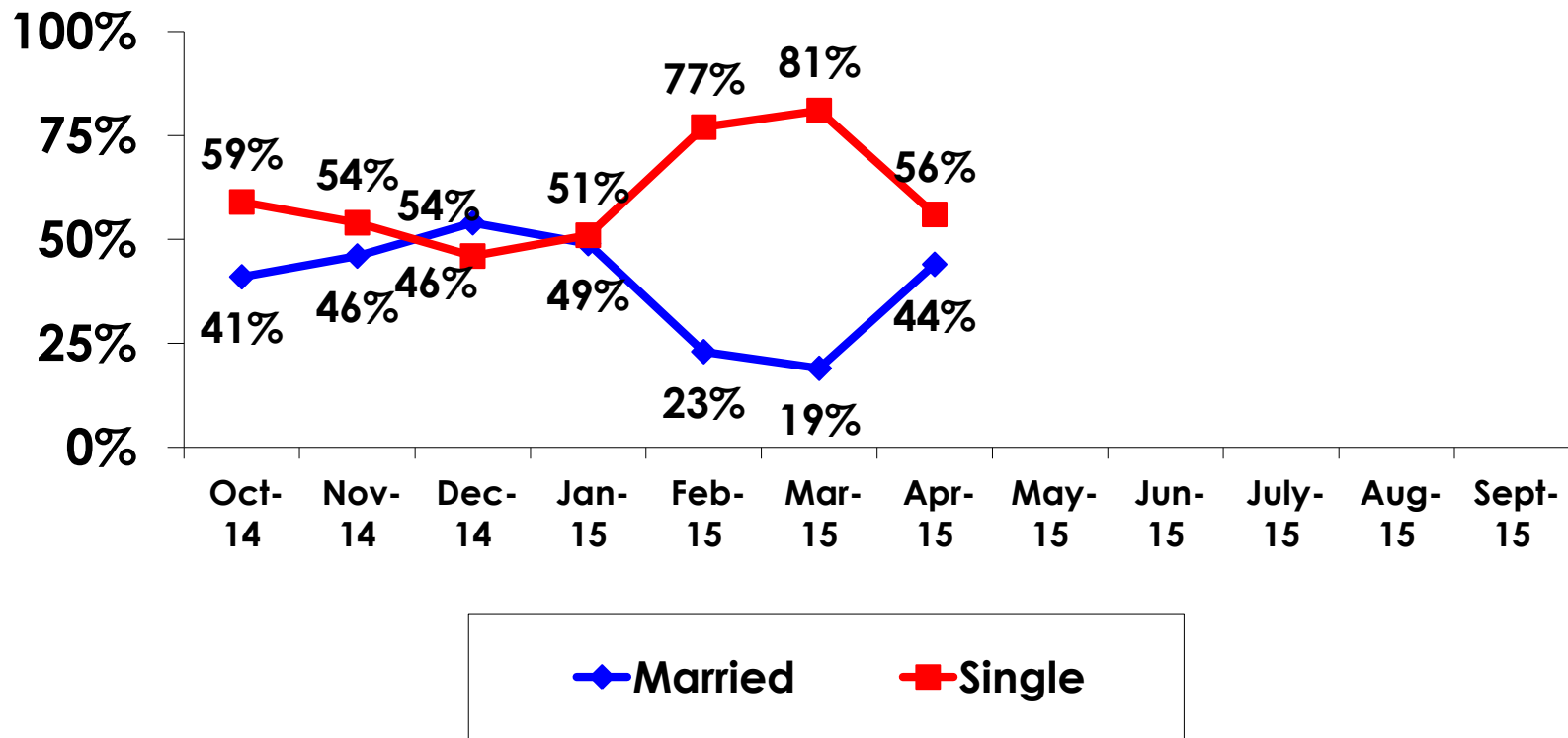
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

Highlighted Segments

	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	July 15	Aug 15	Sept 15
Families	36%	39%	59%	46%	23%	21%	37%					
Office Lady	13%	11%	10%	12%	8%	2%	9%					
Group	5%	3%	1%	4%	5%	4%	5%					
Silver	2%	5%	3%	5%	3%	0%	4%					
Wedding	9%	6%	0%	3%	2%	1%	6%					
Sport	32%	29%	35%	27%	33%	41%	32%					
18-35	71%	63%	48%	56%	83%	84%	60%					
36-55	25%	29%	46%	36%	13%	13%	34%					
Child	11%	12%	35%	19%	7%	10%	13%					
Honeymo on	4%	5%	3%	4%	4%	2%	5%					
Repeat	43%	43%	51%	50%	34%	25%	45%					
TOTAL	351	350	351	350	350	352	352					

SECTION 1 **PROFILE OF RESPONDENTS**

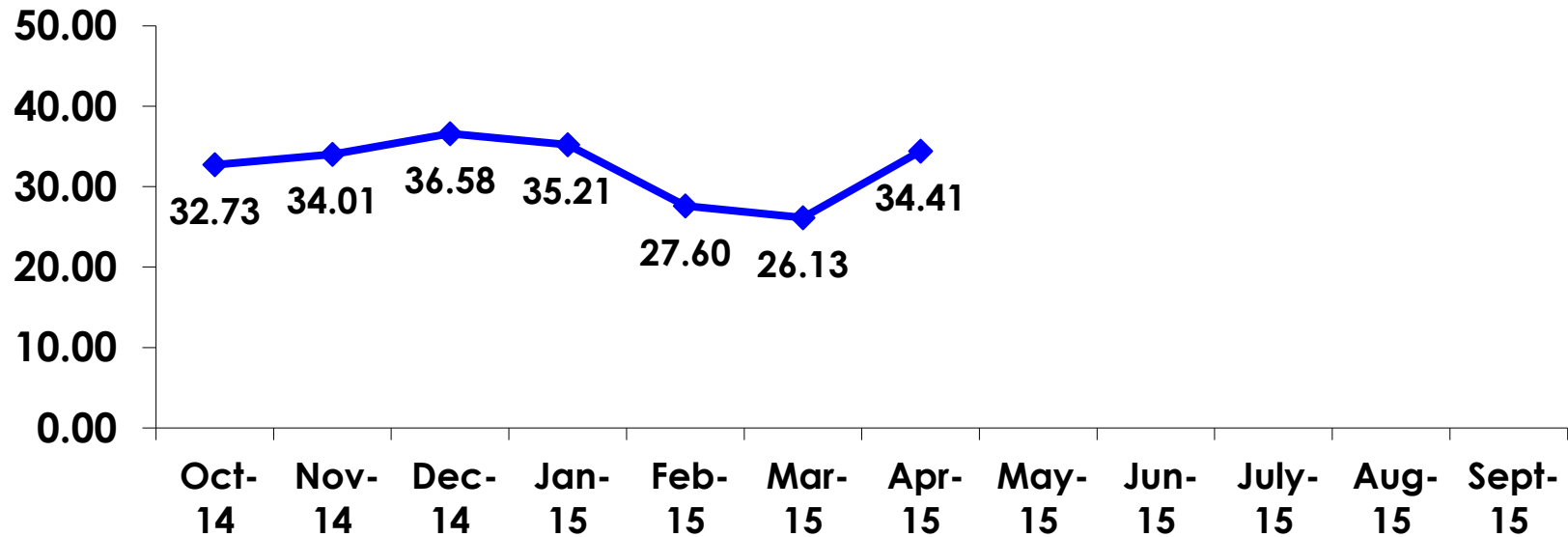
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	44%	87%	18%	33%	86%	62%	38%	26%	70%	93%	88%	50%
	Single	56%	13%	82%	67%	14%	38%	62%	74%	30%	7%	12%	50%
	Total Count	350	129	33	18	14	21	111	212	118	44	17	157

AVERAGE AGE - TRACKING



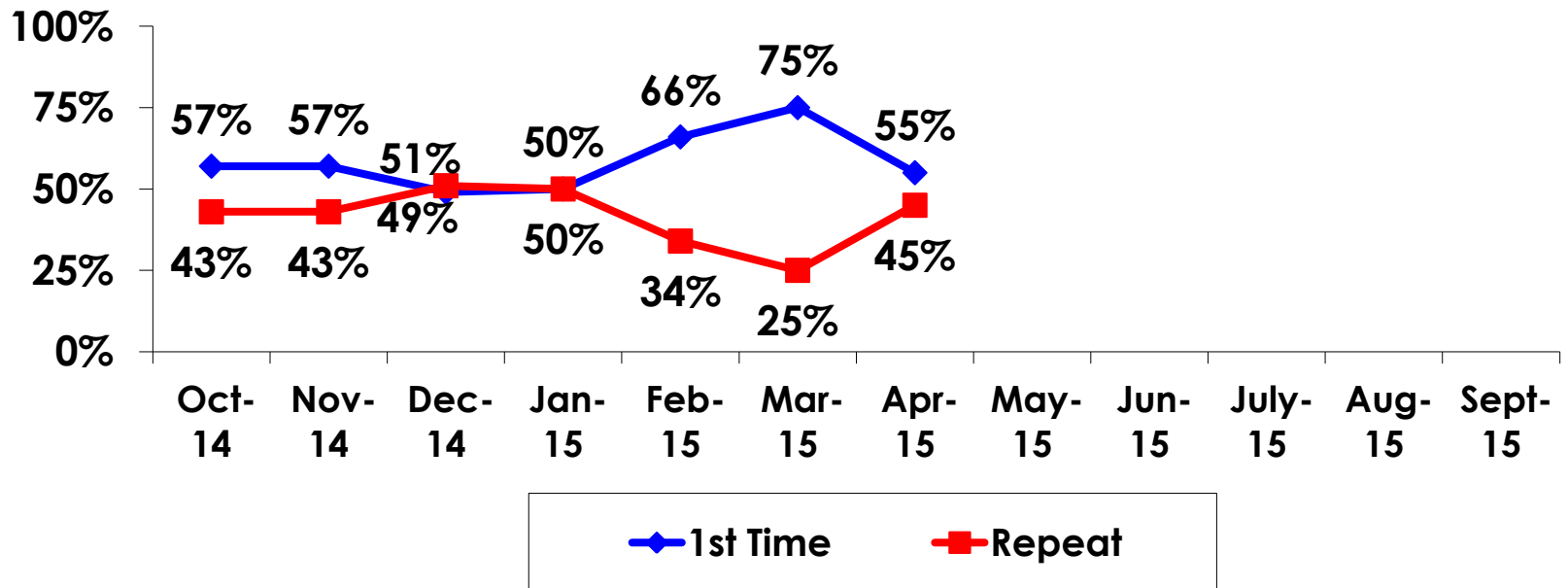
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	21%	8%	30%	33%		19%	21%	35%		2%	18%	15%
	25-34	38%	24%	39%	28%		33%	44%	62%		9%	59%	30%
	35-49	30%	50%	24%	28%		33%	29%	2%	85%	70%	18%	38%
	50+	10%	18%	6%	11%	100%	14%	6%		15%	18%	6%	16%
	Total Count	349	129	33	18	14	21	110	212	119	44	17	156
QF	Mean	34.41	40.59	31.36	35.00	64.43	36.48	33.00	26.78	43.71	43.16	31.18	37.81
	Median	31	41	27	33	64	33	30	26	43	42	30	38

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%	8%		5%	3%	8%	4%			4%
	Y2.0M-Y3.0M	13%	8%	14%	15%	8%	26%	11%	15%	12%	7%		12%
	Y3.0M-Y4.0M	18%	13%	21%	23%	8%	21%	19%	24%	12%	5%	36%	11%
	Y4.0M-Y5.0M	15%	18%	17%	8%	23%	11%	17%	16%	12%	10%	29%	16%
	Y5.0M-Y7.0M	20%	24%	17%	23%	31%	21%	22%	17%	24%	24%	21%	19%
	Y7.0M-Y10.0M	14%	23%	14%		23%	5%	12%	6%	22%	33%	14%	19%
	Y10.0M+	13%	12%	7%	23%	8%	11%	10%	12%	15%	21%		16%
	No Income	1%	1%					4%	2%				1%
	Total	Count	303	120	29	13	19	98	173	111	42	14	134

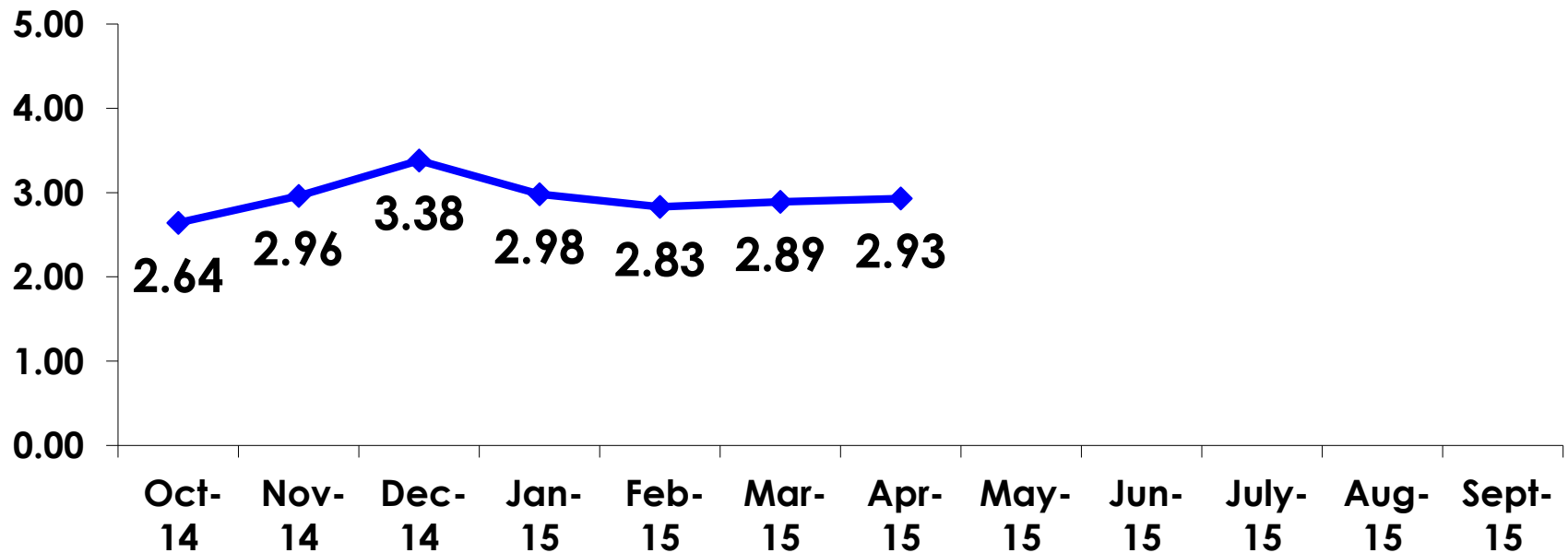
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	55%	48%	55%	44%	29%	55%	58%	66%	41%	39%	82%	
	No	45%	52%	45%	56%	71%	45%	42%	34%	59%	61%	18%	100%
	Total Count	352	131	33	18	14	22	111	212	119	44	17	158

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	2.93	3.30	2.55	2.67	3.71	2.68	2.98	2.72	3.23	3.64	3.53	3.01
	Median	3	3	3	2	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	57%	57%	81%		43%	45%	59%	63%	48%	48%	53%	50%	
	Full package tour	19%	22%	10%		14%	36%	18%	19%	20%	23%	29%	20%	
	Individually arranged travel (FIT)	14%	16%			29%	5%	15%	10%	19%	20%	12%	20%	
	Group tour	5%	2%	6%	100%	7%		5%	5%	5%	5%		7%	
	Company paid travel	2%	1%	3%				1%	1%	4%		6%	2%	
	Other	2%	2%			7%	14%	1%	1%	3%	5%		2%	
	Total	Count	340	129	31	18	14	22	110	202	118	44	17	152

TRAVEL MOTIVATION - SEGMENTATION

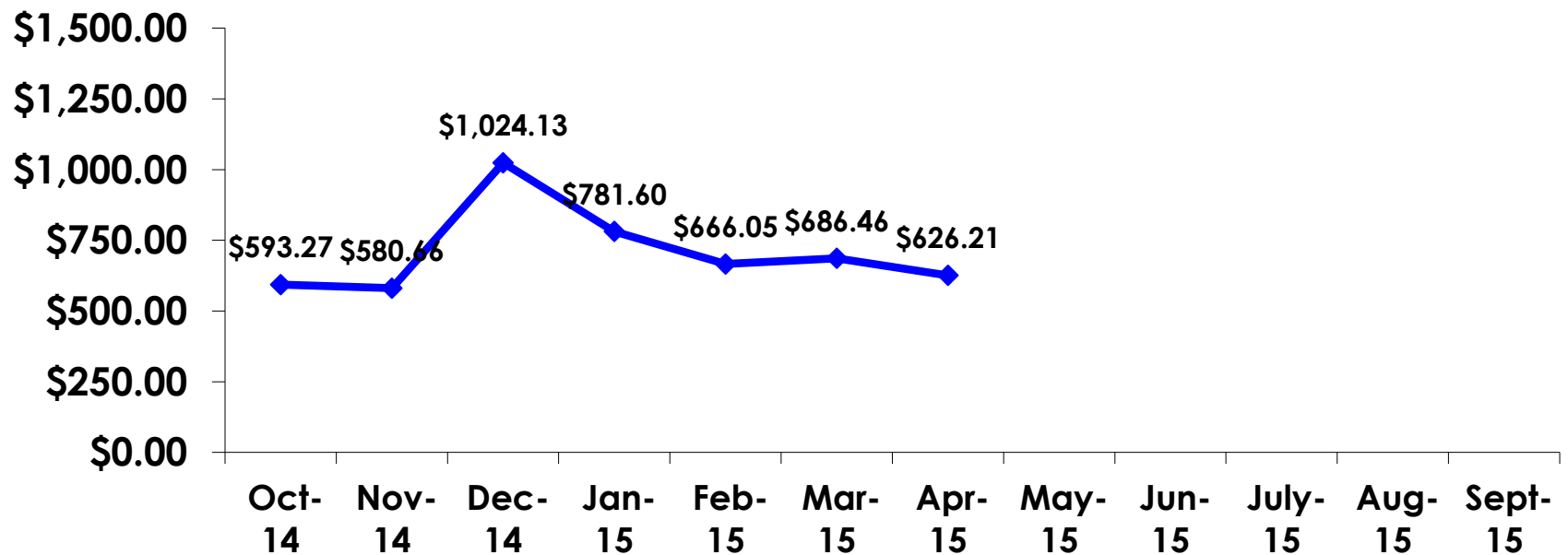
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	35%	41%	41%	33%	71%	14%	37%	26%	43%	45%	6%	77%
	Price	19%	18%	22%	11%	21%	5%	25%	22%	14%	18%	6%	18%
	Visit friends/ Relatives	3%	3%	6%	6%	14%		5%	1%	4%	7%		6%
	Recomm- friend/family/trvl agnt	19%	11%	19%	22%	21%		16%	23%	12%	16%	18%	13%
	Scuba	4%	5%		11%	7%	5%	6%	3%	4%	5%		5%
	Water sports	21%	21%	25%		14%	14%	33%	20%	23%	30%	24%	21%
	Short travel time	46%	54%	56%	6%	57%	18%	54%	46%	45%	59%	35%	47%
	Golf	6%	7%	3%	11%	21%		8%	3%	8%	5%		11%
	Relax	34%	37%	22%	6%	29%	5%	39%	36%	34%	39%	35%	33%
	Company/ Business Trip	7%	4%	9%	67%			5%	6%	11%	5%	6%	9%
	Company Sponsored	1%	1%	3%				1%	1%	1%	2%		1%
	Convention/ Trade/ Conference	1%	1%					1%	0%	1%	2%	6%	1%
	Safe	22%	31%	34%	6%	50%	9%	21%	20%	25%	39%	24%	23%
	Natural beauty	51%	56%	63%	17%	50%	32%	59%	53%	49%	57%	47%	47%
	Shopping	25%	26%	22%	17%	29%		27%	28%	18%	30%	24%	26%
	Career Cert/ Testing	1%	1%		6%			4%	1%	2%	2%	6%	2%
	Married/ Attn wedding	6%	8%	3%		7%	100%	7%	5%	8%	5%	12%	6%
	Honeymoon	5%	11%				9%	6%	6%	3%		100%	2%
	Pleasure	43%	44%	44%	6%	43%	18%	53%	46%	38%	48%	35%	40%
	Organized sports	7%	2%	6%	6%	7%		5%	7%	7%	5%	6%	7%
	Other	5%	5%			7%		3%	2%	11%	5%		5%
	Total	Count	350	131	32	18	14	22	111	210	119	44	158

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	80%	78%	85%	72%	36%	68%	77%	83%	82%	77%	82%	74%	
	Travel Guidebook- Bookstore	43%	48%	42%	39%	43%	41%	57%	42%	46%	45%	71%	41%	
	Travel Agent Brochure	36%	44%	39%	33%	21%	59%	41%	38%	33%	41%	53%	30%	
	Friend/ Relative	35%	27%	39%	39%	50%	55%	34%	41%	24%	23%	35%	28%	
	Prior Trip	33%	43%	39%	44%	71%	32%	36%	23%	45%	48%	12%	74%	
	Magazine (Consumer)	29%	35%	27%	11%	36%	27%	35%	31%	25%	30%	47%	24%	
	TV	8%	8%	9%	11%	7%		8%	8%	8%	9%	6%	9%	
	Co-Worker/ Company Trvl Dept	4%	2%		17%		5%	5%	4%	5%	2%		4%	
	Consumer Trvl Show	2%	2%	3%				2%	4%			6%	2%	
	GVB Office	2%	2%	3%	6%			1%	2%	2%		6%	1%	
	Travel Trade Show	1%						1%	1%				1%	
	GVB Promo	1%	1%		6%				1%	1%		6%	1%	
	Other	1%	1%				5%		0%	1%			1%	
	Newspaper	1%			6%			1%	1%				1%	
	Theater Ad	0%						1%	0%				1%	
	Radio	0%							0%					
	Total	Count	351	131	33	18	14	22	111	211	119	44	17	157

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$708.81

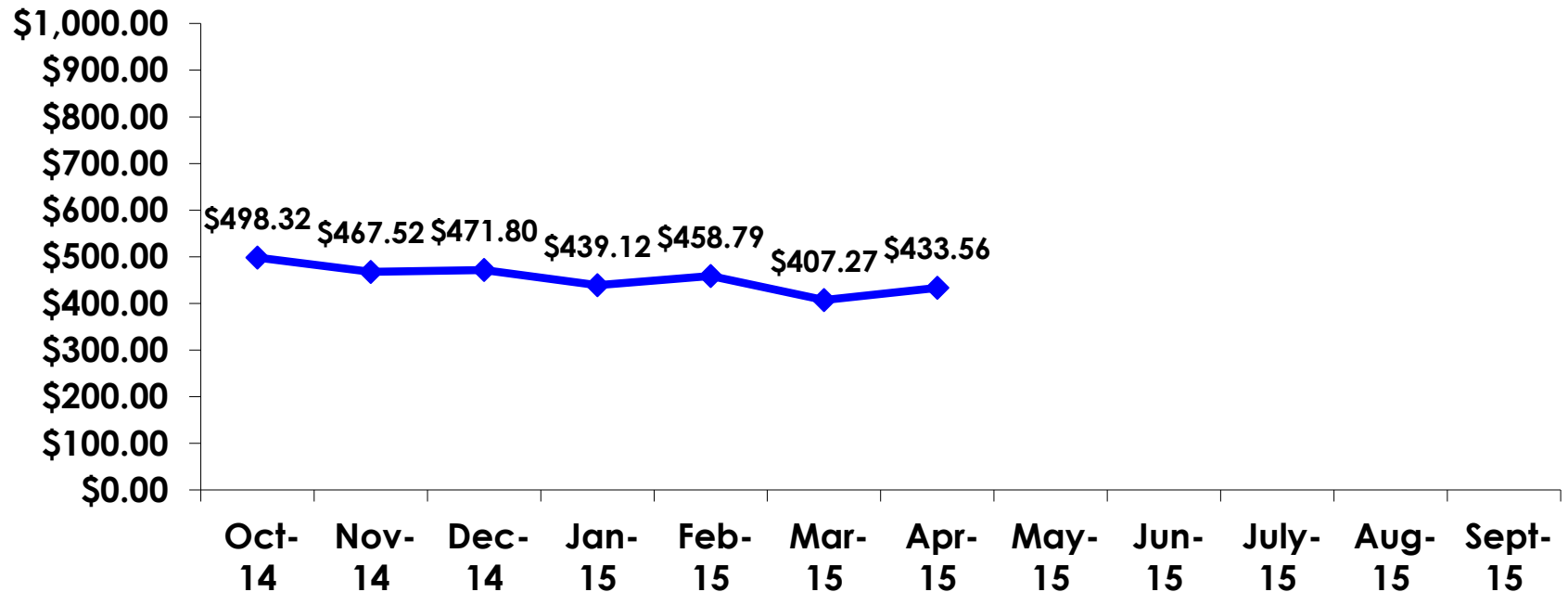
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$626.21	\$731.10	\$543.05	\$439.02	\$832.91	\$750.85	\$671.06	\$580.52	\$666.46	\$707.48	\$1,071.12	\$611.87
	Median	\$586	\$628	\$569	\$419	\$624	\$723	\$628	\$578	\$628	\$684	\$1,172	\$586
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,014	\$3,014	\$1,005	\$1,507	\$2,176	\$3,014	\$3,014	\$1,674	\$3,014	\$1,674	\$3,014	\$3,014

PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,137.42	\$1,921.24	\$650.79	\$835.01	\$1,792.92	\$1,101.92	\$1,171.64	\$845.43	\$1,698.25	\$2,954.65	\$1,992.30	\$1,107.99
	Median	\$753	\$1,339	\$586	\$753	\$1,088	\$723	\$666	\$636	\$1,172	\$2,511	\$2,093	\$837
AIR/ HOTEL/ MEAL	Mean	\$2,152.23	\$2,678.20	\$1,339.36	\$749.76	\$2,176.46	\$2,516.88	\$2,501.88	\$1,752.76	\$2,474.60	\$3,526.23	\$3,264.69	\$2,363.81
	Median	\$1,674	\$2,176	\$1,339	\$670	\$2,176	\$1,005	\$1,674	\$1,507	\$1,925	\$3,348	\$2,511	\$1,925
AIR ONLY	Mean	\$872.33	\$1,997.08	.	\$418.55	\$837.10	.	\$406.59	\$391.92	\$1,315.64	\$2,232.27	\$452.03	\$1,168.95
	Median	\$419	\$1,674	.	\$419	\$837	.	\$368	\$410	\$544	\$1,925	\$452	\$419
HOTEL ONLY	Mean	\$534.49	\$1,059.53	.	.	\$837.10	.	\$281.03	\$161.84	\$839.61	\$1,883.48	\$292.99	\$782.31
	Median	\$167	\$502	.	.	\$837	.	\$167	\$167	\$460	\$1,883	\$293	\$293
HOTEL & MEAL	Mean	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.
F&B HOTEL	Mean	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.
TRANS- JAPAN	Mean	\$61.66	\$74.08	\$65.29	\$13.39	\$69.48	\$97.66	\$47.27	\$47.51	\$82.39	\$88.49	\$49.18	\$64.33
	Median	\$50	\$84	\$42	\$13	\$67	\$84	\$50	\$38	\$84	\$84	\$50	\$42
TRANS- GUAM	Mean	\$73.00	\$51.90	\$62.78	\$41.86	\$41.86	.	\$83.71	\$41.86	\$93.76	.	.	.
	Median	\$42	\$42	\$63	\$42	\$42	.	\$84	\$42	\$84	.	.	.
OPT TOURS	Mean	\$297.46	\$501.88	\$188.35	\$140.03	\$167.42	\$178.58	\$173.74	\$145.67	\$548.99	\$329.36	\$123.47	\$706.88
	Median	\$167	\$167	\$126	\$140	\$167	\$167	\$166	\$126	\$167	\$167	\$123	\$167
OTHER	Mean	\$368.92	\$763.85	.	.	\$865.00	\$1,674.20	\$460.41	\$148.59	\$460.41	\$1,255.65	.	\$837.10
	Median	\$105	\$670	.	.	\$837	\$1,674	\$126	\$105	\$84	\$1,256	.	\$837
TOTAL	Mean	\$1,177.07	\$2,003.77	\$669.88	\$530.92	\$1,908.89	\$1,549.46	\$1,276.79	\$811.50	\$1,733.17	\$2,837.47	\$1,935.18	\$1,284.59
	Median	\$753	\$1,256	\$586	\$465	\$1,170	\$822	\$724	\$611	\$1,071	\$2,511	\$1,842	\$833

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$453.72

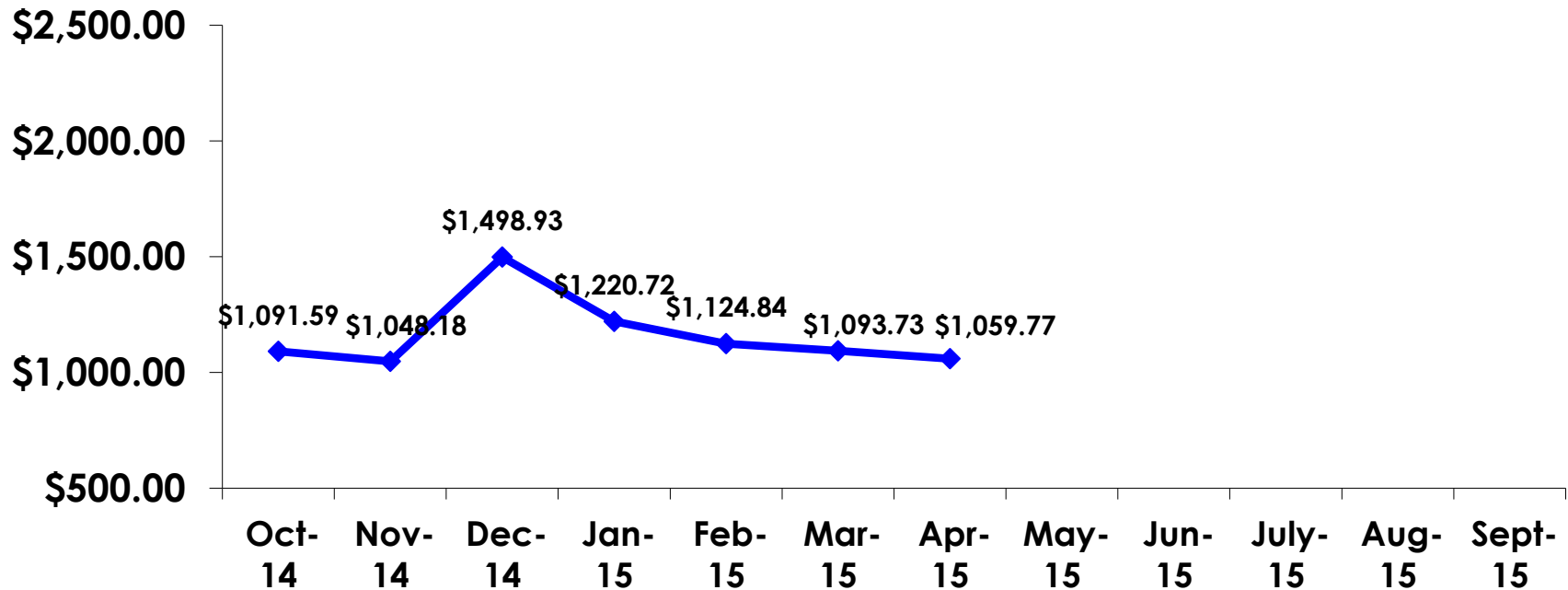
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$433.56	\$407.13	\$388.19	\$458.19	\$307.07	\$330.49	\$431.58	\$438.73	\$442.32	\$391.41	\$651.71	\$426.24
	Median	\$330	\$307	\$300	\$222	\$225	\$310	\$320	\$332	\$333	\$294	\$450	\$300
	Minimum	\$0	\$0	\$114	\$100	\$0	\$74	\$0	\$0	\$0	\$0	\$125	\$0
	Maximum	\$3,000	\$3,000	\$1,400	\$3,000	\$1,000	\$800	\$3,000	\$3,000	\$3,000	\$1,667	\$3,000	\$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	\$30.57	\$49.13	\$29.82	\$7.22	\$30.07	\$27.18	\$27.74	\$23.11	\$40.66	\$99.89	\$28.82	\$31.56
F&B FF/STORE	Mean	\$30.64	\$45.29	\$14.24	\$28.00	\$3.57	\$16.64	\$36.27	\$28.71	\$37.80	\$49.57	\$90.24	\$28.41
F&B RESTRNT	Mean	\$79.18	\$115.61	\$47.73	\$21.67	\$39.29	\$77.50	\$87.61	\$71.51	\$101.34	\$152.50	\$80.00	\$89.27
OPT TOUR	Mean	\$53.99	\$67.61	\$51.21	\$62.17	\$42.14	\$32.18	\$73.39	\$49.80	\$65.69	\$68.86	\$88.24	\$58.65
GIFT- SELF	Mean	\$158.61	\$217.04	\$80.61	\$221.83	\$32.14	\$56.36	\$198.14	\$156.51	\$184.03	\$383.18	\$156.18	\$167.35
GIFT- OTHER	Mean	\$94.77	\$117.94	\$83.94	\$63.89	\$46.43	\$125.09	\$93.75	\$96.33	\$99.89	\$132.73	\$244.71	\$80.01
TRANS	Mean	\$13.24	\$24.52	\$16.61	\$8.72	\$23.57	\$7.45	\$12.76	\$9.42	\$18.76	\$35.57	\$6.82	\$13.39
OTHER	Mean	\$209.82	\$316.50	\$111.82	\$87.28	\$255.64	\$172.55	\$181.52	\$155.81	\$297.77	\$383.07	\$339.94	\$243.79
TOTAL	Mean	\$669.66	\$954.24	\$435.67	\$500.22	\$472.86	\$499.05	\$705.68	\$592.37	\$840.49	\$1,312.18	\$1,032.59	\$708.89

TOTAL EXPENDITURES – TRACKING



YTD=\$1,162.53

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	\$1,059.77	\$1,138.23	\$931.24	\$897.20	\$1,139.99	\$1,081.34	\$1,102.64	\$1,019.25	\$1,108.78	\$1,098.88	\$1,722.82	\$1,038.10
	Median	\$997	\$1,036	\$945	\$835	\$1,238	\$973	\$1,002	\$969	\$1,000	\$1,113	\$1,656	\$993
	Minimum	\$0	\$0	\$200	\$138	\$0	\$86	\$0	\$86	\$0	\$0	\$300	\$33
	Maximum	\$4,172	\$4,172	\$2,237	\$3,000	\$2,676	\$3,264	\$3,264	\$4,172	\$3,264	\$2,587	\$4,172	\$3,264

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 2014, Jan, Feb, Mar, Apr 2015, and Overall Oct 2014 - Apr 2015

	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	Combin ed Oct 2014 - Apr 2015
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks		3			3	2		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				4	3		3
Variety of shopping		4		2				
Price of things on Guam								
Quality of hotel accommodations			2		5	1	4	2
Quality/cleanliness of air, sky							1	
Quality/cleanliness of parks		1						
Quality of landscape in Tumon	2							
Quality of landscape in Guam		2	1	1	1		3	1
Quality of ground handler	1						2	5
Quality/cleanliness of transportation vehicles			3	3	2			7
% of Overall Satisfaction Accounted For	47.0%	52.7%	37.9%	35.6%	44.5%	33.0%	45.6%	41.7%

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 April 2015 Period. By rank order they are:
 - **Quality/cleanliness of air, sky,**
 - **Quality of ground handler,**
 - **Quality of landscape in Guam, and**
 - **Quality of hotel accommodations.**
- With all four factors the overall r^2 is .456 meaning that **45.6% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2014, Jan, Feb, Mar, Apr 2015 and Overall Oct 2014-Apr 2015

	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	Combin ed Oct 2014- Apr 2015
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks								2
Ease of getting around			1					3
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%	0.0%	0.0%	0.0%	1.2%

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 factors in the April 2015 Period.