



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2015 Market Segmentation

### DECEMBER 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

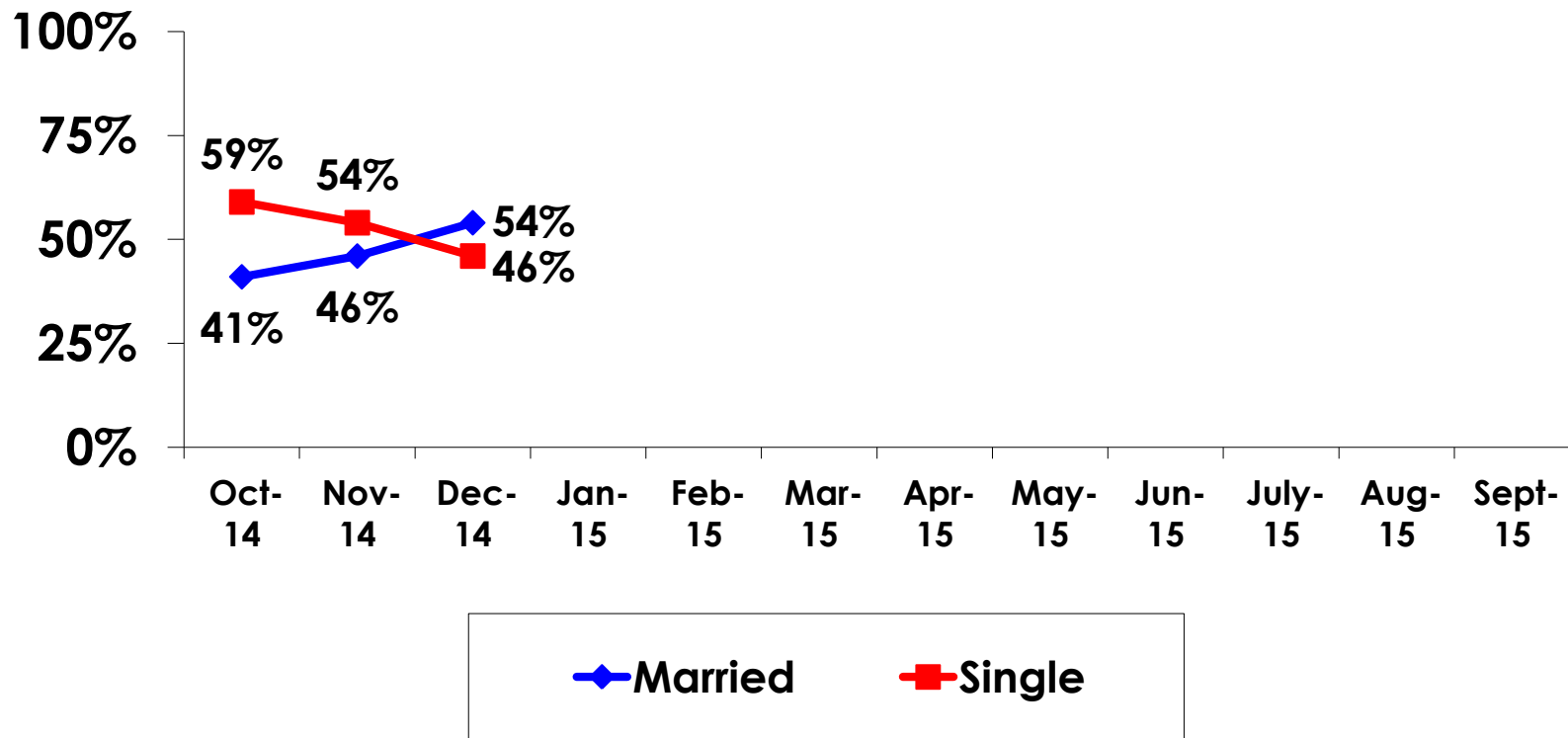
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

# Highlighted Segments

	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	July 15	Aug 15	Sept 15
<b>Families</b>	36%	39%	59%									
<b>Office Lady</b>	13%	11%	10%									
<b>Group</b>	5%	3%	1%									
<b>Silver</b>	2%	5%	3%									
<b>Wedding</b>	9%	6%	0%									
<b>Sport</b>	32%	29%	35%									
<b>18-35</b>	71%	63%	48%									
<b>36-55</b>	25%	29%	46%									
<b>Child</b>	11%	12%	35%									
<b>Honey-moon</b>	4%	5%	3%									
<b>Repeat</b>	43%	43%	51%									
<b>TOTAL</b>	<b>351</b>	<b>350</b>	<b>351</b>									

# SECTION 1 **PROFILE OF RESPONDENTS**

# MARITAL STATUS - TRACKING

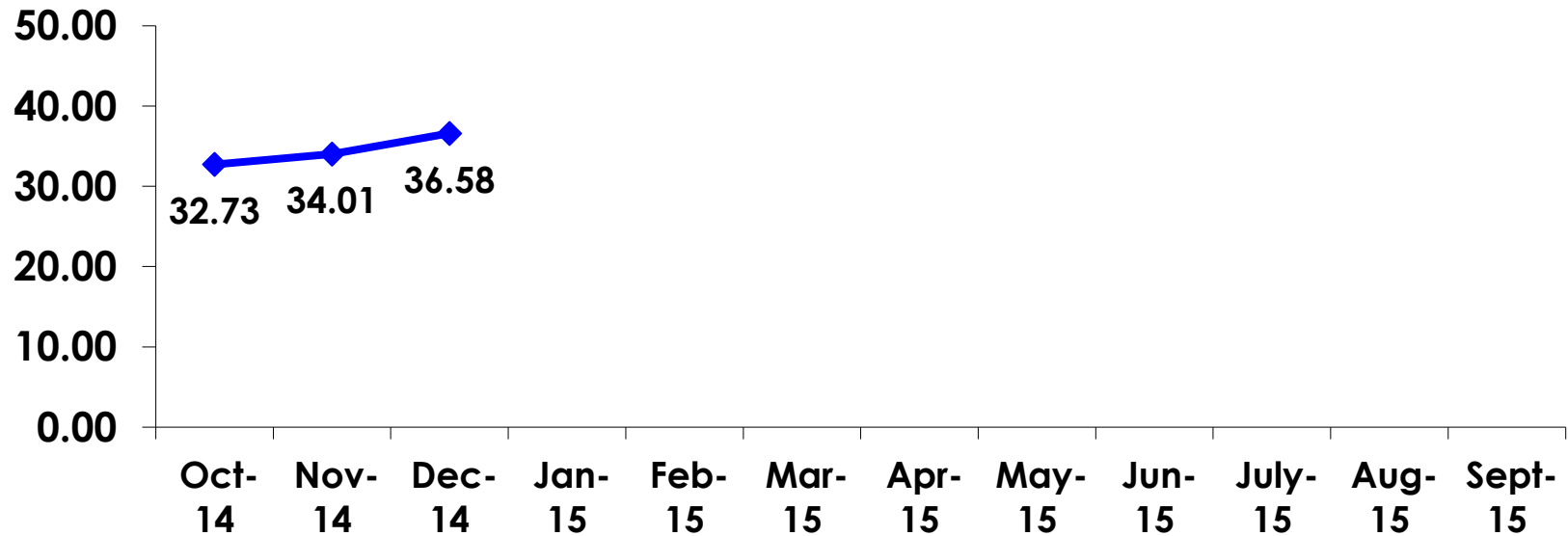


# MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	54%	86%	29%		90%		52%	22%	82%	93%	100%	63%
	Single	46%	14%	71%	100%	10%	100%	48%	78%	18%	7%		37%
	Total Count	350	207	35	2	10	1	124	167	162	121	10	178



# AVERAGE AGE - TRACKING



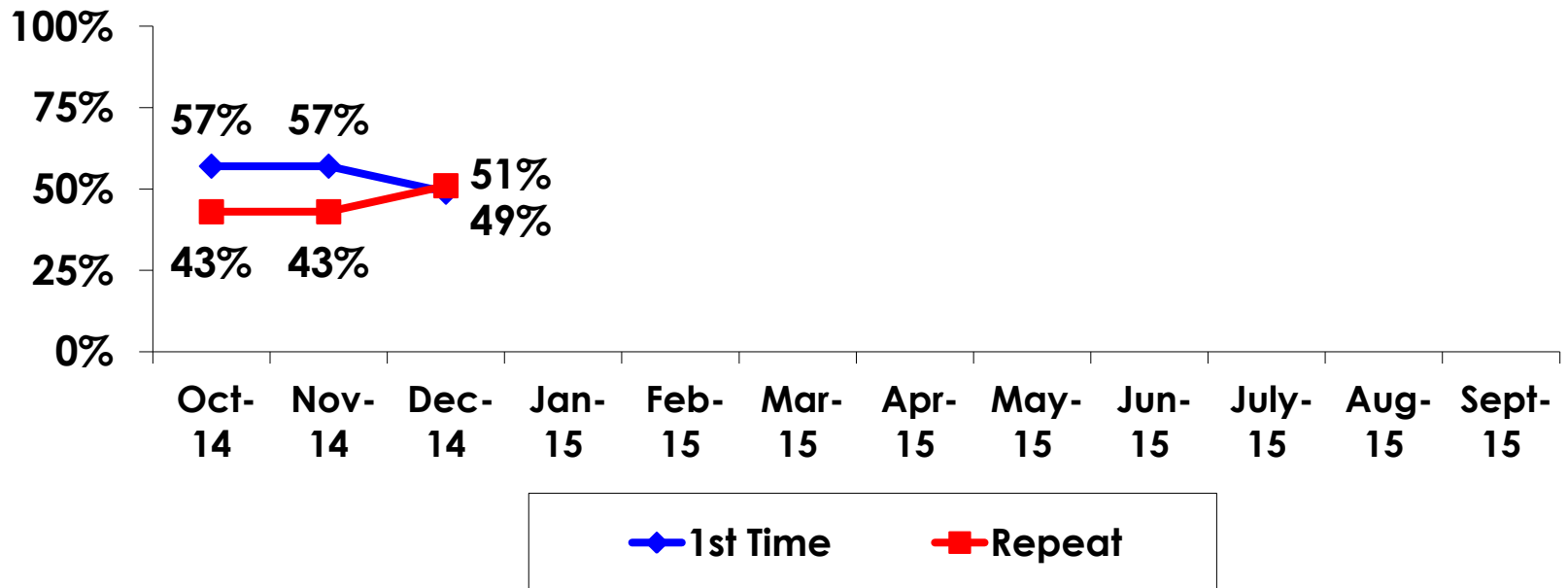
# AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	18%	7%	17%	100%			20%	37%		3%	10%	11%
	25-34	29%	16%	39%			100%	36%	60%		9%	80%	21%
	35-49	39%	57%	44%				30%	4%	81%	76%	10%	50%
	50+	14%	20%			100%		14%		19%	12%		18%
	Total Count	350	206	36	2	10	1	124	168	162	121	10	178
QF	Mean	36.58	41.51	33.86	21.00	65.50	33.00	35.08	26.37	44.11	42.31	29.00	39.57
	Median	36	42	33	21	63	33	32	26	44	43	28	40

# INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	4%	2%	7%				4%	7%	1%	2%		3%
	Y2.0M-Y3.0M	6%	2%	14%		14%		4%	12%	1%		11%	4%
	Y3.0M-Y4.0M	14%	4%	21%	100%			16%	24%	5%	3%	11%	11%
	Y4.0M-Y5.0M	11%	9%	14%				11%	14%	7%	6%	44%	8%
	Y5.0M-Y7.0M	19%	24%	10%		14%		19%	16%	22%	25%	33%	22%
	Y7.0M-Y10.0M	18%	21%	14%		14%	100%	16%	10%	25%	26%		20%
	Y10.0M+	26%	37%	21%		57%		29%	14%	38%	36%		32%
	No Income	2%	2%					2%	4%	1%	3%		1%
	Total Count	293	174	29	1	7	1	113	137	141	108	9	152

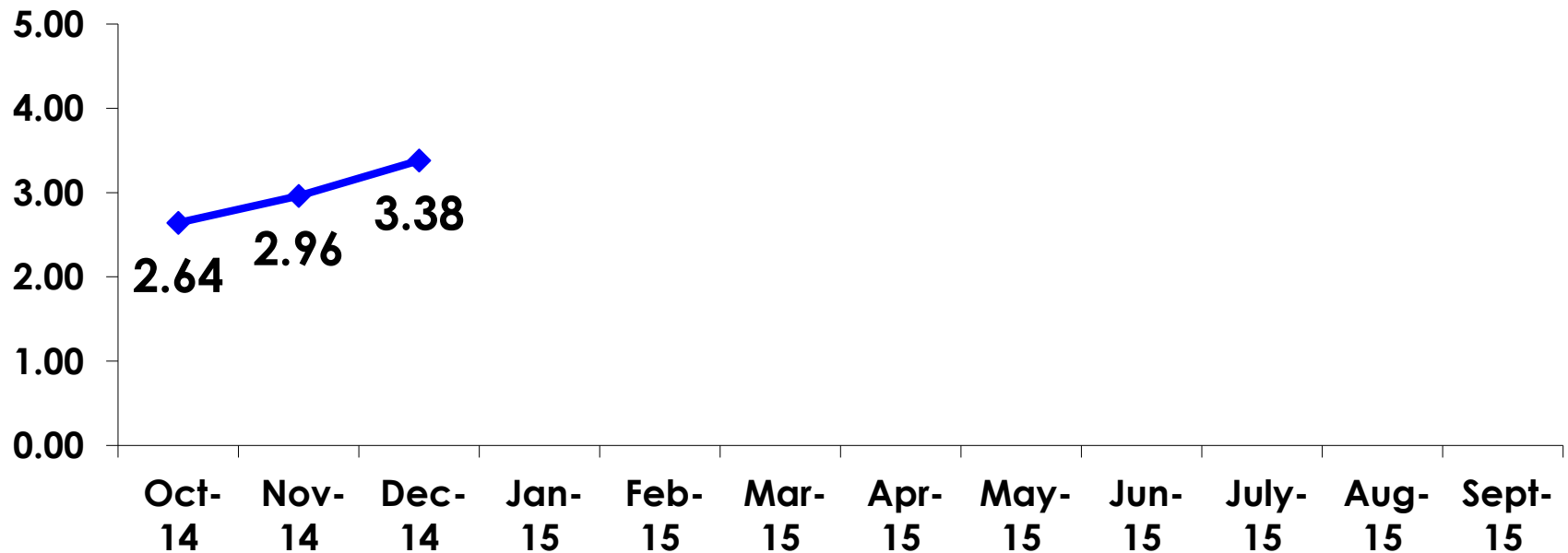
# PRIOR TRIPS TO GUAM - TRACKING



# 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%	41%	50%	50%	60%	100%	56%	64%	34%	32%	80%		
	No	51%	59%	50%	50%	40%		44%	36%	66%	68%	20%	100%	
	Total	Count	351	207	36	2	10	1	124	168	162	121	10	178

# 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	3.38	3.53	3.14	6.00	3.70	4.00	3.34	3.18	3.54	3.68	3.20	3.47
	Median	3	3	3	6	4	4	3	3	3	4	3	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	56%	49%	51%		50%	100%	64%	67%	45%	45%	40%	51%	
	Full package tour	23%	26%	20%		10%		24%	22%	25%	28%	60%	22%	
	Individually arranged travel (FIT)	19%	23%	26%		30%		11%	9%	29%	26%		25%	
	Company paid travel	1%	0%	3%					1%	1%	1%		1%	
	Other	1%	1%			10%		1%		1%	1%		1%	
	Group tour	1%			100%				1%				1%	
	Total	Count	348	205	35	2	10	1	123	168	159	120	10	178

# TRAVEL MOTIVATION - SEGMENTATION

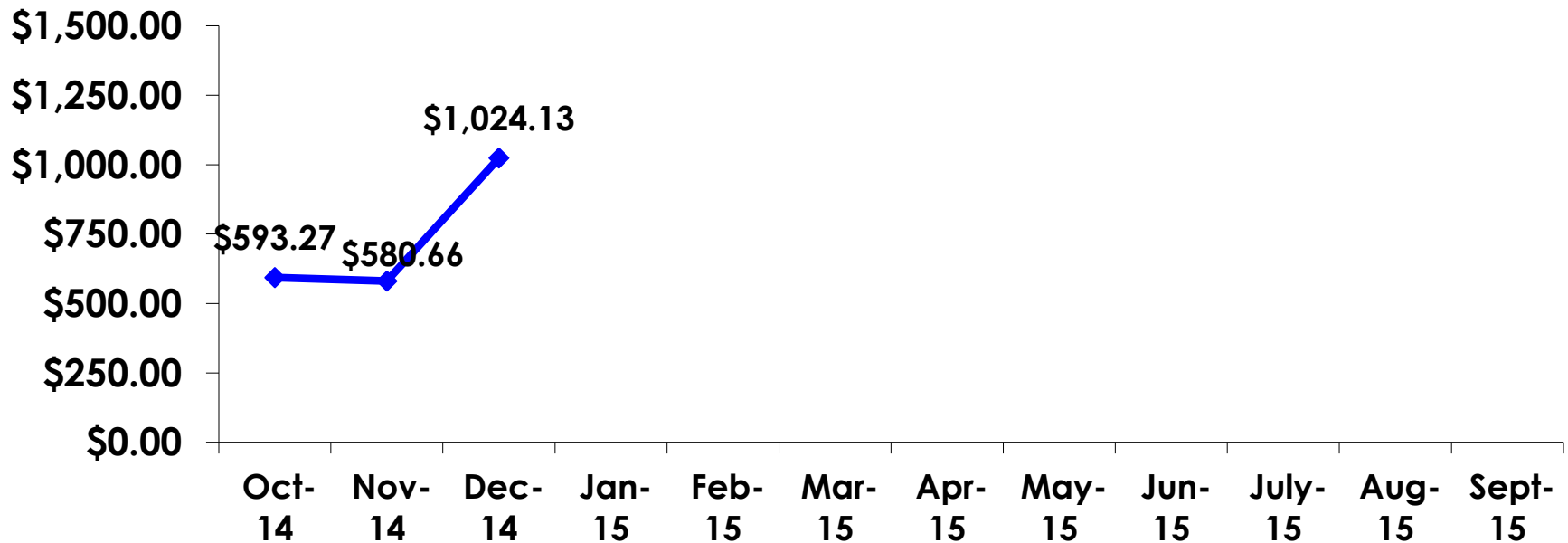
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	43%	52%	44%	50%	30%		40%	29%	57%	62%	20%	84%
	Price	17%	15%	19%				20%	22%	14%	16%	10%	14%
	Visit friends/ Relatives	1%	1%					2%	2%	1%	1%	10%	2%
	Recomm- friend/family/trvl agnt	18%	12%	22%		20%		18%	26%	10%	12%	10%	6%
	Scuba	6%	4%	8%				14%	7%	7%	6%		5%
	Water sports	21%	20%	14%		10%		42%	23%	22%	22%	30%	20%
	Short travel time	61%	69%	47%	50%	70%		61%	49%	71%	73%	50%	66%
	Golf	3%	4%			50%		2%		3%	3%		4%
	Relax	44%	41%	47%		30%		44%	45%	43%	41%	10%	46%
	Company/ Business Trip	2%	1%	6%				1%	2%	1%	1%		1%
	Company Sponsored	1%	1%						1%	1%	2%		1%
	Safe	30%	33%	25%	50%	10%		33%	24%	37%	39%	20%	37%
	Natural beauty	70%	68%	56%	50%	40%		77%	73%	68%	70%	60%	69%
	Shopping	30%	28%	31%		30%		31%	33%	27%	26%	10%	29%
	Married/ Attn wedding	0%		3%			100%		1%				
	Honeymoon	3%	5%	3%				6%	5%	1%		100%	1%
	Pleasure	58%	54%	50%		50%		63%	59%	57%	57%	30%	62%
	Organized sports	2%	0%		50%			2%	4%		1%		2%
	Other	3%	3%	3%		20%		2%	2%	4%	4%		2%
	Total Count	349	206	36	2	10	1	124	167	161	120	10	177

# INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	82%	81%	78%	100%	50%	100%	85%	83%	82%	79%	100%	83%	
	Travel Guidebook- Bookstore	57%	55%	64%		20%		65%	61%	54%	54%	60%	47%	
	Prior Trip	44%	51%	44%	50%	40%		38%	29%	60%	60%	20%	86%	
	Travel Agent Brochure	38%	37%	28%	50%			45%	45%	32%	35%	60%	28%	
	Magazine (Consumer)	29%	30%	17%		20%		35%	33%	25%	31%	40%	29%	
	Friend/ Relative	25%	18%	25%	50%	50%		37%	34%	16%	16%	60%	14%	
	TV	11%	8%	17%		20%		15%	15%	7%	7%		10%	
	Consumer Trvl Show	2%	0%					3%	2%	1%	1%		1%	
	GVB Promo	1%	0%	3%				1%	1%	2%	1%		2%	
	Co-Worker/ Company Trvl Dept	1%	0%	3%				2%	1%	1%	1%		1%	
	GVB Office	1%	0%					2%	1%	1%			1%	
	Newspaper	1%	0%			10%			1%		1%		1%	
	Other	1%	1%	3%					1%				1%	
	Radio	1%	0%						1%	1%			1%	
	Total	Count	350	206	36	2	10	1	124	168	161	121	10	177

# SECTION 3 **EXPENDITURES**

# PREPAID EXPENDITURES - TRACKING

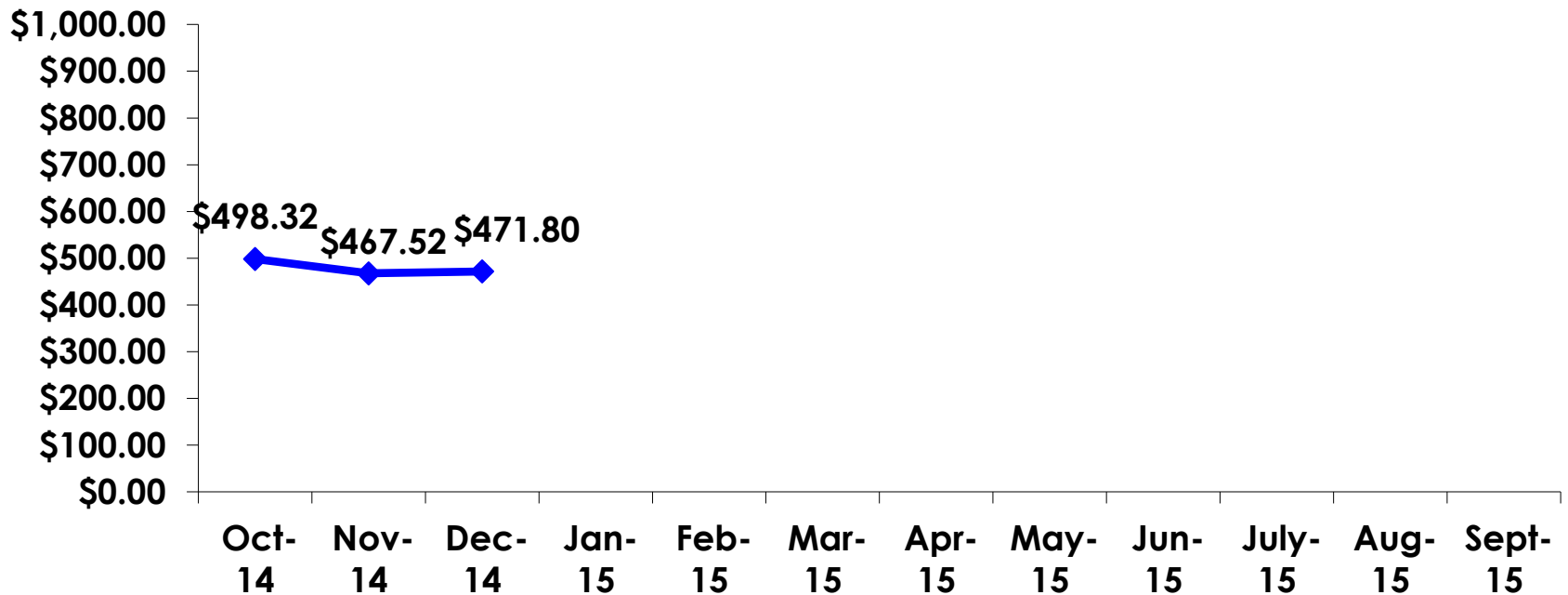


YTD=\$733.97

# 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	\$1,027.13	\$1,084.56	\$998.29	\$0.00	\$717.02	\$864.28	\$1,171.84	\$1,003.73	\$1,040.46	\$1,103.47	\$1,269.24	\$1,030.21
	Median	\$1,004	\$1,046	\$962	\$0	\$648	\$864	\$1,087	\$861	\$1,046	\$1,046	\$1,234	\$1,004
	Minimum	\$0	\$0	\$0	\$0	\$0	\$864	\$0	\$0	\$0	\$0	\$627	\$0
	Maximum	\$5,018	\$3,178	\$2,788	\$0	\$2,216	\$864	\$5,018	\$5,018	\$3,178	\$2,959	\$2,593	\$2,959

# ON-ISLAND EXPENDITURES - TRACKING



YTD = \$479.20

# ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

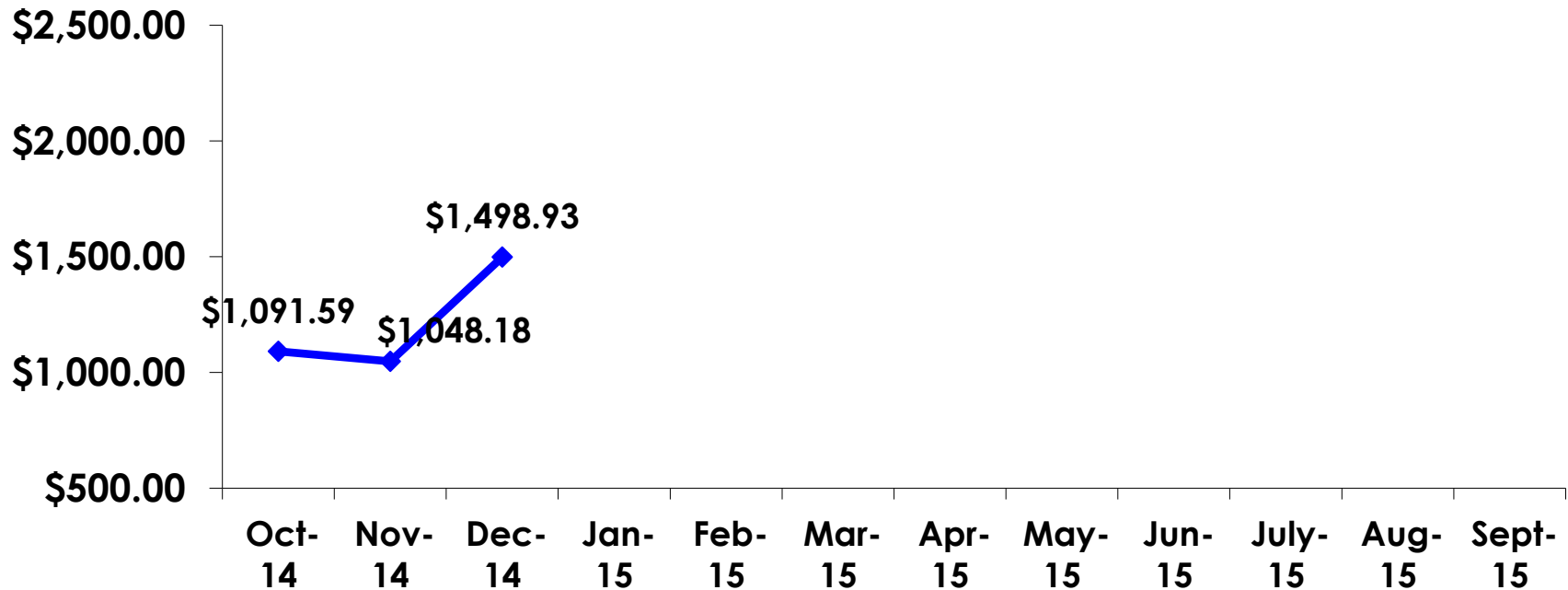
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$471.80	\$446.91	\$417.86	\$150.00	\$514.45	\$604.00	\$467.82	\$501.63	\$430.48	\$380.02	\$458.00	\$455.31
	Median	\$348	\$300	\$317	\$150	\$427	\$604	\$350	\$400	\$300	\$260	\$400	\$318
	Minimum	\$0	\$0	\$0	\$100	\$0	\$604	\$0	\$0	\$0	\$0	\$100	\$0
	Maximum	\$3,000	\$3,000	\$1,800	\$200	\$1,525	\$604	\$2,500	\$2,670	\$3,000	\$1,531	\$1,250	\$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	\$58.62	\$84.01	\$36.94	\$0.00	\$165.00	\$0.00	\$69.08	\$13.15	\$94.92	\$105.63	\$26.00	\$74.48
	Median	\$0	\$0	\$0	\$0	\$35	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$46.23	\$56.57	\$21.11	\$0.00	\$63.00	\$0.00	\$50.81	\$32.67	\$60.60	\$56.62	\$110.50	\$38.90
	Median	\$5	\$10	\$0	\$0	\$25	\$0	\$11	\$3	\$0	\$0	\$38	\$0
F&B RESTRNT	Mean	\$106.62	\$137.03	\$89.03	\$0.00	\$173.00	\$95.00	\$112.18	\$81.01	\$132.14	\$138.94	\$173.30	\$126.43
	Median	\$20	\$50	\$0	\$0	\$75	\$95	\$40	\$5	\$45	\$20	\$165	\$30
OPT TOUR	Mean	\$78.31	\$92.19	\$49.28	\$0.00	\$116.00	\$108.00	\$98.36	\$58.58	\$94.06	\$96.09	\$109.00	\$79.36
	Median	\$0	\$0	\$0	\$0	\$0	\$108	\$10	\$0	\$0	\$0	\$110	\$0
GIFT- SELF	Mean	\$216.57	\$281.24	\$123.69	\$0.00	\$22.00	\$0.00	\$153.84	\$137.07	\$306.29	\$286.96	\$112.00	\$257.56
	Median	\$7	\$0	\$65	\$0	\$0	\$0	\$35	\$6	\$35	\$0	\$35	\$8
GIFT- OTHER	Mean	\$103.54	\$125.24	\$36.56	\$0.00	\$16.00	\$0.00	\$122.37	\$76.83	\$130.90	\$133.19	\$109.00	\$99.26
	Median	\$50	\$75	\$0	\$0	\$0	\$0	\$100	\$40	\$85	\$50	\$79	\$50
TRANS	Mean	\$25.71	\$35.25	\$4.75	\$0.00	\$39.00	\$0.00	\$36.39	\$16.40	\$35.17	\$32.93	\$0.00	\$27.70
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$394.28	\$520.17	\$262.61	\$150.00	\$1,272.00	\$401.00	\$308.18	\$297.13	\$425.48	\$582.12	\$276.20	\$372.10
	Median	\$0	\$0	\$0	\$150	\$335	\$401	\$0	\$8	\$0	\$0	\$0	\$0
TOTAL	Mean	\$1,021.04	\$1,322.09	\$621.47	\$150.00	\$1,866.00	\$604.00	\$946.96	\$707.42	\$1,266.05	\$1,431.81	\$916.00	\$1,070.58
	Median	\$700	\$1,000	\$575	\$150	\$1,150	\$604	\$640	\$500	\$1,000	\$1,000	\$800	\$800

# TOTAL EXPENDITURES – TRACKING



YTD=\$1,213.17

# 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	\$1,498.93	\$1,531.47	\$1,416.15	\$150.00	\$1,231.48	\$1,468.28	\$1,639.66	\$1,505.37	\$1,470.94	\$1,483.49	\$1,727.24	\$1,485.52
	Median	\$1,436	\$1,440	\$1,397	\$150	\$1,298	\$1,468	\$1,587	\$1,487	\$1,353	\$1,361	\$1,696	\$1,407
	Minimum	\$0	\$0	\$0	\$100	\$0	\$1,468	\$0	\$0	\$0	\$0	\$777	\$0
	Maximum	\$5,438	\$5,091	\$3,507	\$200	\$2,866	\$1,468	\$5,438	\$5,438	\$5,091	\$4,427	\$2,923	\$5,091

# 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.

<b>Comparison of Drivers of Overall Satisfaction, Oct, Nov, Dec 2014, and Overall Oct-Dec 2014</b>				
	Oct-14	Nov-14	<b>Dec-14</b>	Combin ed Oct- Dec 2014
Drivers:	rank	rank	<b>rank</b>	rank
Quality & Cleanliness of beaches & parks		3		4
Ease of getting around				
Safety walking around at night				
Quality of daytime tours		5	<b>4</b>	6
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping	3			3
Variety of shopping		4		
Price of things on Guam				
Quality of hotel accommodations			<b>2</b>	2
Quality/cleanliness of air, sky				
Quality/cleanliness of parks		1		
Quality of landscape in Tumon	2			7
Quality of landscape in Guam		2	<b>1</b>	1
Quality of ground handler	1			8
Quality/cleanliness of transportation vehicles			<b>3</b>	5
% of Overall Satisfaction Accounted For	47.0%	52.7%	<b>37.9%</b>	44.9%
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 four significant factors in the December 2014 Period. By rank order they are:
  - **Quality of landscape in Guam,**
  - **Quality of hotel accommodations,**
  - **Quality/cleanliness of transportation vehicles, and**
  - **Quality of day time tours.**
- With all four factors the overall  $r^2$  is .379 meaning that **37.9% of overall satisfaction is accounted for by these factors.**

<b>Drivers of Per Person On Island Expenditures, Oct, Nov, Dec 2014 and Overall Oct-Dec 2014</b>				
	Oct-14	Nov-14	<b>Dec-14</b>	Combin ed Oct- Dec 2014
Drivers:	rank	rank	<b>rank</b>	rank
Quality & Cleanliness of beaches & parks				
Ease of getting around			<b>1</b>	
Safety walking around at night				
Quality of daytime tours				
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping				
Variety of shopping			<b>2</b>	
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%	<b>5.3%</b>	0.0%
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 two significant factors in the December 2014 Period. By rank order they are:
  - **Ease of getting around, and**
  - **Variety of shopping.**
- With these two factors, the overall  $r^2$  is .053 meaning that **5.3% of per person on island expenditure is accounted for by these factors.**