



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015 Market Segmentation

JUNE 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

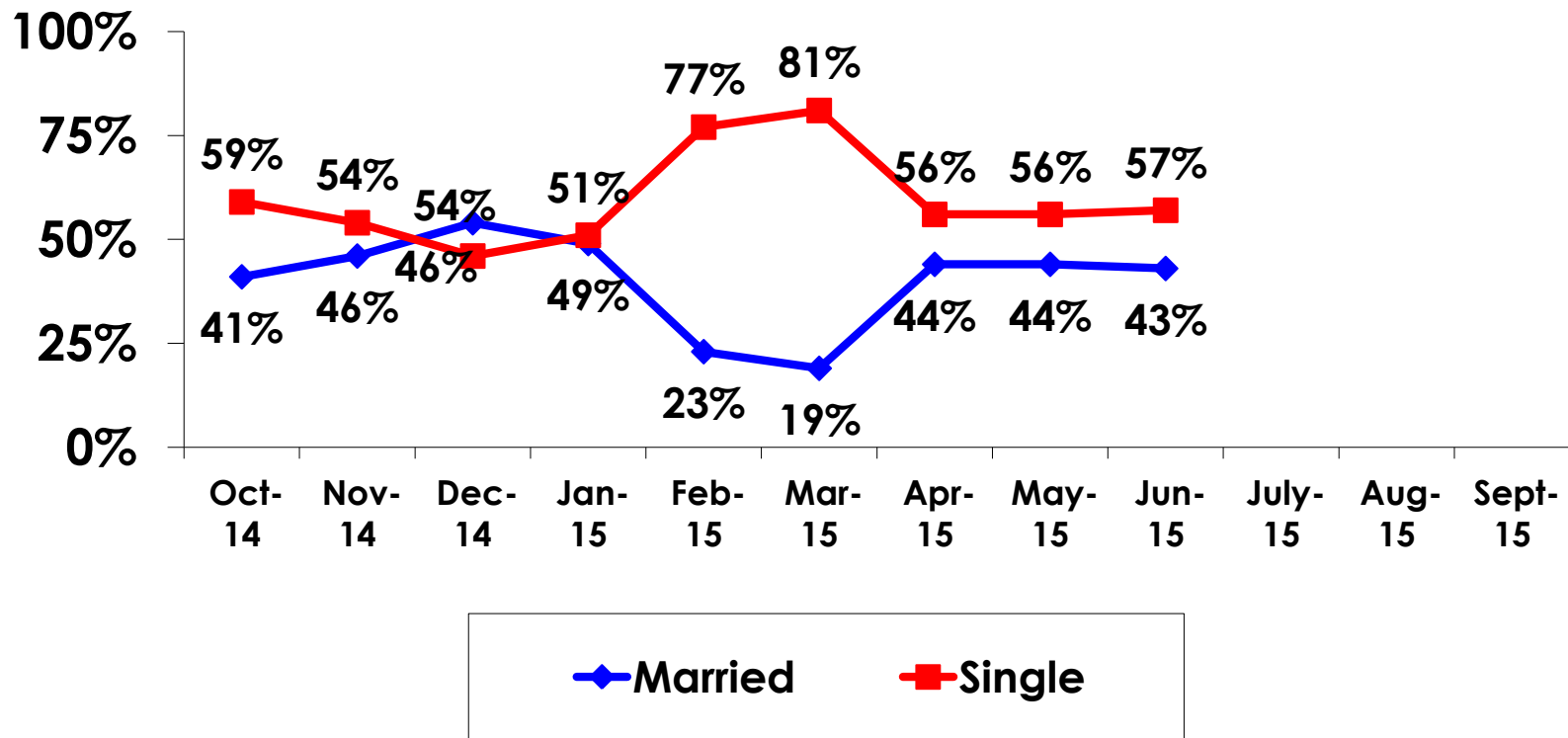
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%	45%	42%			
Office Lady	13%	11%	10%	12%	8%	2%	9%	16%	19%			
Group	5%	3%	1%	4%	5%	4%	5%	3%	4%			
Silver	2%	5%	3%	5%	3%	0%	4%	4%	5%			
Wedding	9%	6%	0%	3%	2%	1%	6%	6%	10%			
Sport	32%	29%	35%	27%	33%	41%	32%	29%	29%			
18-35	71%	63%	48%	56%	83%	84%	60%	62%	66%			
36-55	25%	29%	46%	36%	13%	13%	34%	30%	25%			
Child	11%	12%	35%	19%	7%	10%	13%	13%	9%			
Honey-moon	4%	5%	3%	4%	4%	2%	5%	4%	5%			
Repeat	43%	43%	51%	50%	34%	25%	45%	43%	47%			
TOTAL	351	350	351	350	350	352	352	352	352			

SECTION 1 **PROFILE OF RESPONDENTS**

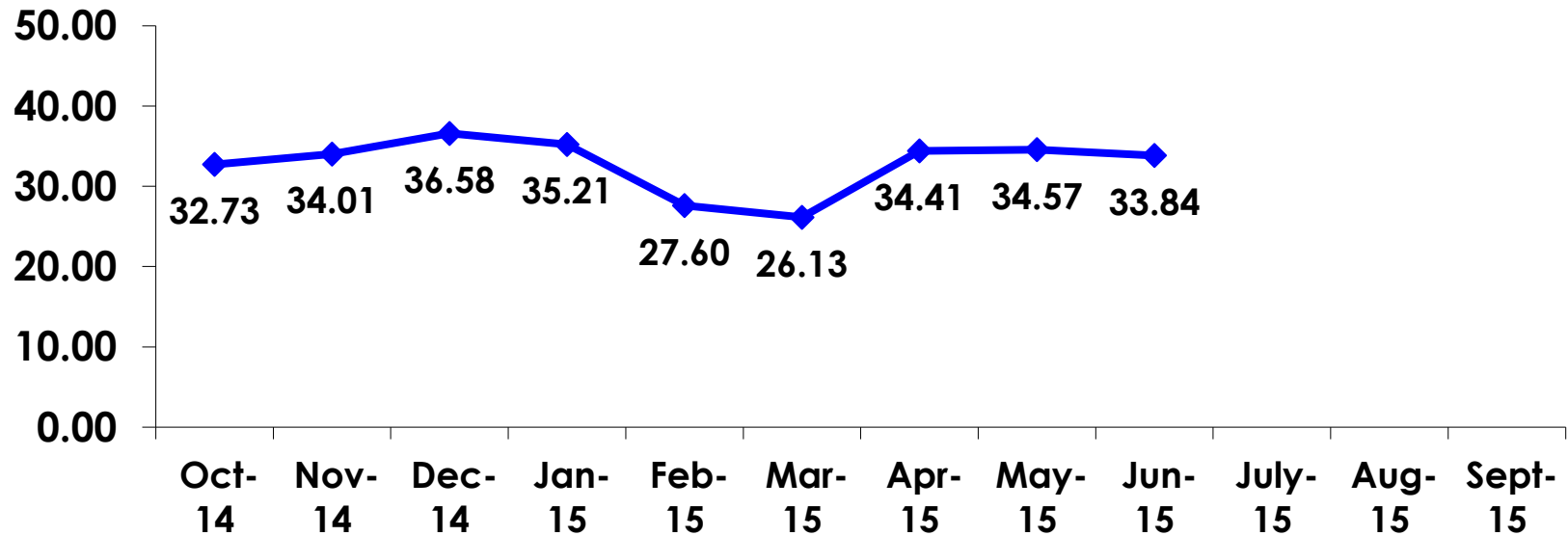
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	43%	77%	20%	40%	94%	62%	32%	23%	79%	97%	100%	49%
	Single	57%	23%	80%	60%	6%	38%	68%	77%	21%	3%		51%
	Total Count	352	146	65	15	17	34	103	233	89	31	18	164

AVERAGE AGE - TRACKING



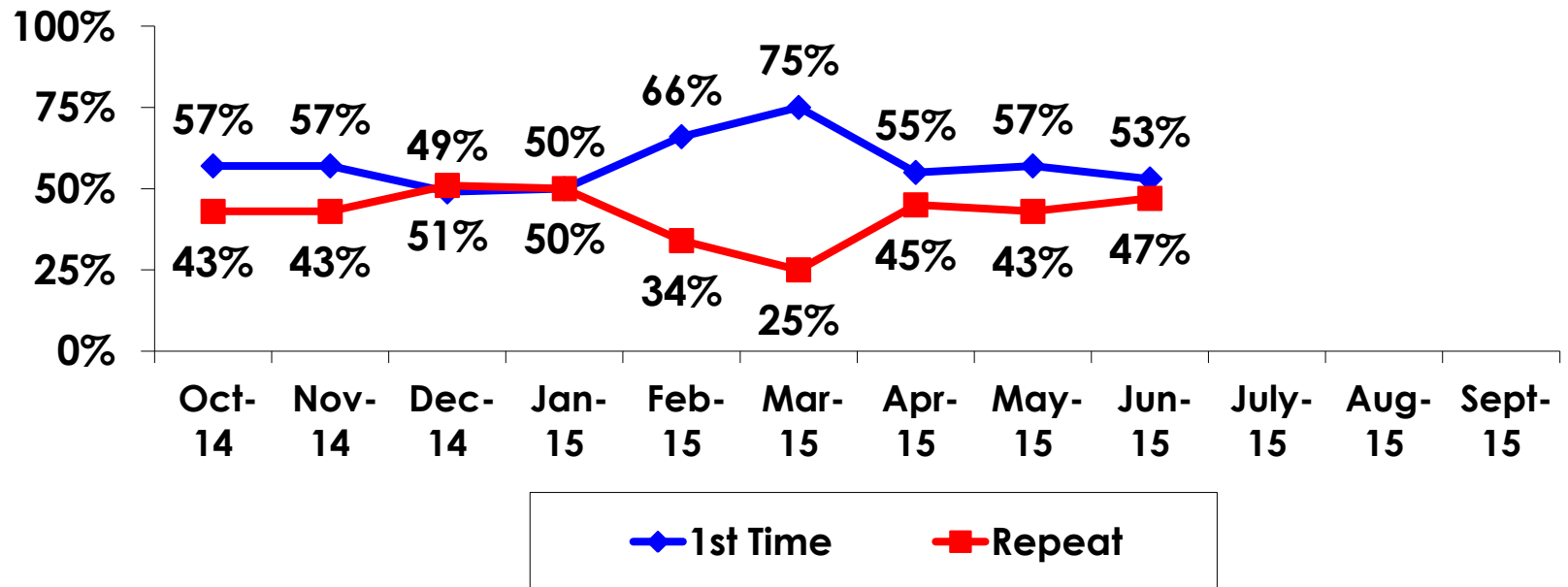
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	20%	6%	29%	20%		3%	26%	30%		6%		16%
	25-34	44%	35%	55%	40%		62%	43%	67%		16%	67%	39%
	35-49	24%	38%	15%	40%		15%	18%	3%	85%	71%	33%	31%
	50+	12%	21%			100%	21%	13%		15%	6%		13%
	Total Count	352	146	65	15	17	34	103	233	89	31	18	164
QF	Mean	33.84	39.19	28.98	32.73	62.53	36.44	32.15	27.00	42.87	37.94	31.50	35.75
	Median	30	38	28	32	62	31	27	26	41	39	30	33

INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	3%	2%	4%			10%	3%	4%	1%			3%
	Y2.0M-Y3.0M	15%	8%	27%	13%	27%	24%	19%	19%	4%	3%	6%	14%
	Y3.0M-Y4.0M	16%	6%	18%	27%		10%	21%	22%	8%	6%	6%	12%
	Y4.0M-Y5.0M	20%	22%	15%	20%	20%	14%	17%	18%	24%	23%	53%	17%
	Y5.0M-Y7.0M	18%	22%	16%	13%	20%	21%	16%	14%	25%	19%	18%	19%
	Y7.0M-Y10.0M	14%	19%	15%	13%	13%	10%	12%	11%	20%	23%	12%	14%
	Y10.0M+	14%	19%	5%	13%	20%	10%	10%	11%	18%	26%	6%	19%
	No Income	1%	1%					1%	1%	1%			1%
	Total Count	310	139	55	15	15	29	89	197	85	31	17	145

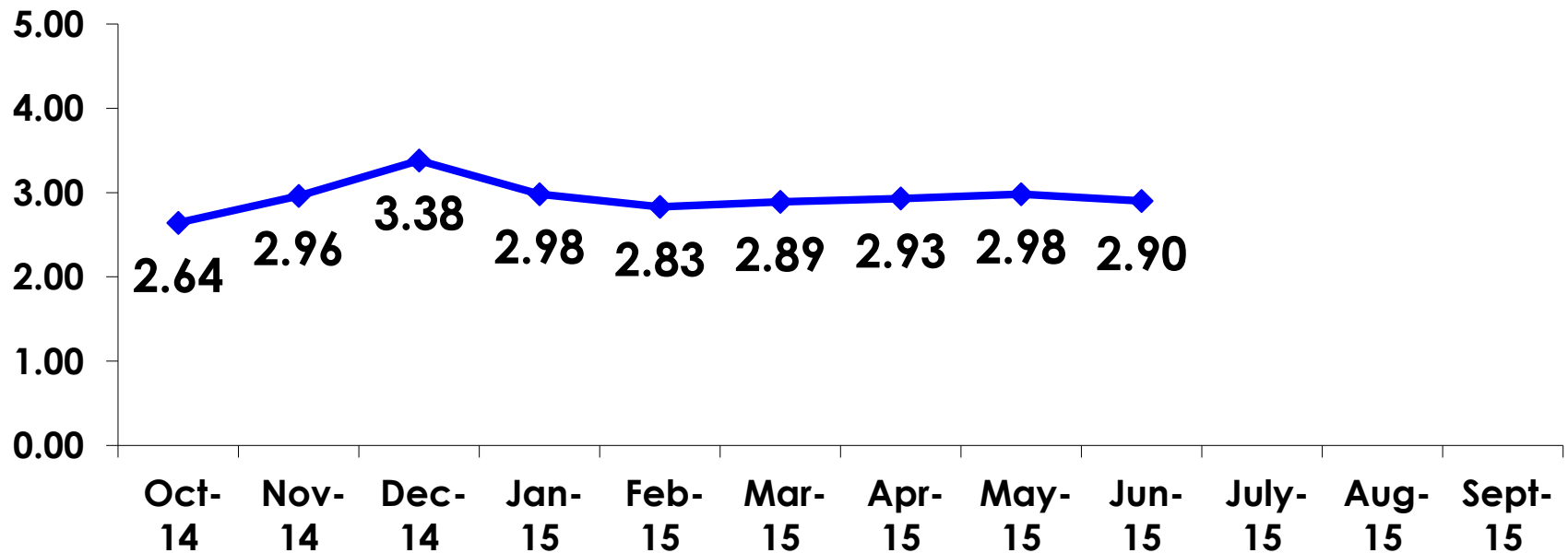
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	53%	45%	58%	73%	41%	41%	63%	58%	43%	35%	83%	
	No	47%	55%	42%	27%	59%	59%	37%	42%	57%	65%	17%	100%
	Total Count	351	146	65	15	17	34	102	233	88	31	18	164

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	2.90	3.17	2.88	2.33	3.12	3.03	2.97	2.82	2.96	3.23	3.56	2.92
	Median	3	3	3	2	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	62%	63%	63%		53%	56%	70%	66%	54%	60%	61%	65%	
	Full package tour	19%	20%	18%		12%	31%	17%	21%	14%	10%	39%	15%	
	Individually arranged travel (FIT)	10%	15%	5%		35%	6%	3%	5%	20%	23%		14%	
	Group tour	4%	1%	8%	100%			4%	4%	7%	3%		2%	
	Company paid travel	3%		5%			3%	4%	4%	2%	3%		2%	
	Other	1%	1%	2%			3%	2%	0%	3%			1%	
	Total	Count	344	144	62	15	17	32	100	227	87	30	18	162

TRAVEL MOTIVATION - SEGMENTATION

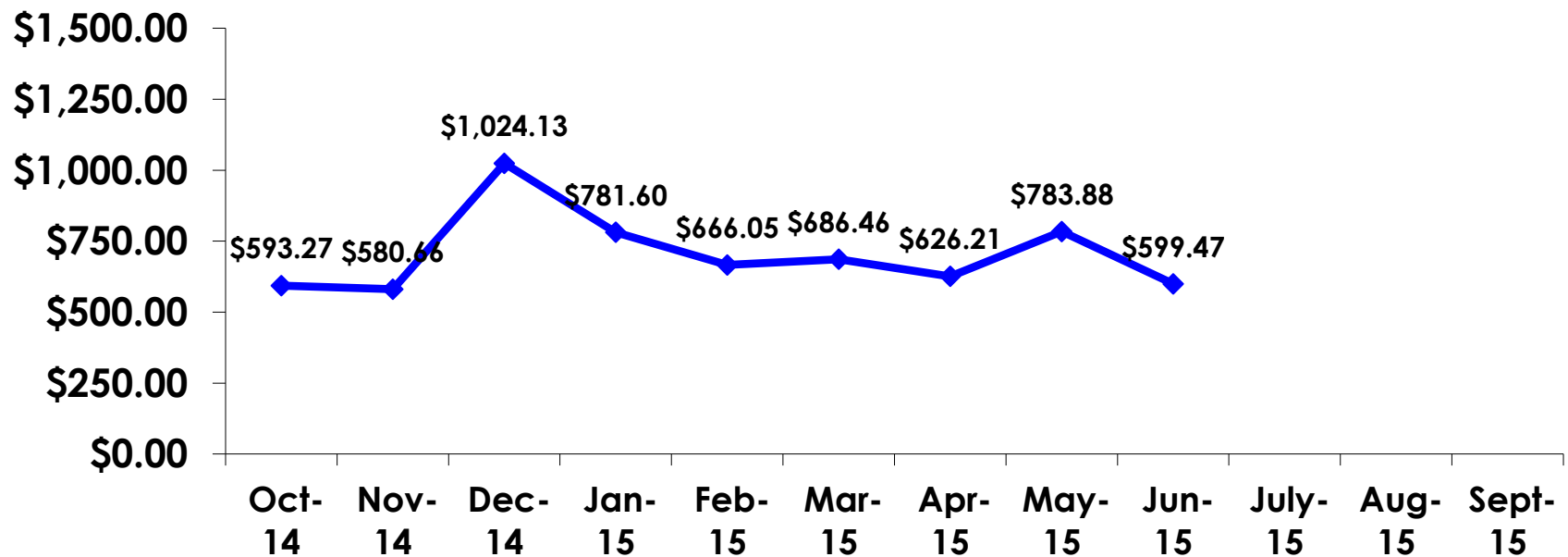
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	40%	46%	40%	29%	41%	38%	32%	37%	49%	58%	11%	87%
	Price	20%	18%	22%		12%	6%	25%	21%	18%	10%	11%	16%
	Visit friends/ Relatives	3%	2%	2%		12%		2%	2%	2%			4%
	Recomm- friend/family/trvl agnt	16%	8%	17%		24%		21%	20%	6%	16%	6%	5%
	Scuba	5%	6%	5%				11%	5%	6%	3%		4%
	Water sports	19%	13%	17%		18%	3%	30%	21%	15%	16%	11%	16%
	Short travel time	55%	58%	57%	7%	59%	21%	59%	56%	53%	58%	56%	59%
	Golf	2%	1%			6%		2%	0%	3%			2%
	Relax	42%	40%	43%	7%	29%	12%	41%	41%	45%	39%	17%	50%
	Company/ Business Trip	9%	1%	17%	86%			10%	11%	8%	10%		9%
	Company Sponsored	1%	1%		7%			3%	1%	2%	3%		1%
	Safe	23%	30%	23%		29%	6%	25%	21%	23%	13%	33%	26%
	Natural beauty	54%	53%	57%	7%	53%	21%	60%	60%	42%	48%	61%	57%
	Shopping	32%	30%	40%		29%	12%	34%	33%	31%	35%	6%	35%
	Married/ Attn wedding	10%	13%	6%		24%	100%	2%	10%	6%	3%	17%	12%
	Honeymoon	5%	12%	2%			9%	5%	6%	6%		100%	2%
	Pleasure	48%	45%	51%	7%	29%	15%	55%	50%	49%	61%	44%	51%
	Organized sports	0%						1%	0%				
	Other	5%	5%	3%	21%	6%		5%	2%	14%	10%		4%
	Total	Count	351	146	65	14	17	34	102	233	88	31	18

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	80%	81%	82%	71%	75%	74%	81%	80%	83%	81%	72%	78%	
	Travel Guidebook-Bookstore	54%	53%	55%	7%	38%	44%	63%	55%	55%	42%	78%	52%	
	Prior Trip	42%	51%	37%	29%	44%	56%	35%	38%	52%	61%	17%	90%	
	Travel Agent Brochure	31%	29%	40%	7%	13%	26%	41%	34%	27%	29%	61%	21%	
	Magazine (Consumer)	29%	29%	32%	14%	38%	32%	33%	33%	21%	26%	33%	34%	
	Friend/ Relative	28%	20%	26%		25%	21%	36%	35%	14%	26%	17%	23%	
	TV	10%	7%	14%	14%	19%	3%	7%	11%	5%	13%	11%	9%	
	Co-Worker/ Company Trvl Dept	4%	2%	6%	21%			4%	5%	2%			2%	
	Consumer Trvl Show	1%	2%					2%	1%	2%	3%		1%	
	GVB Office	1%	2%					3%	0%	2%				
	Other	1%	1%		7%		6%		0%	2%	3%		1%	
	Newspaper	1%	1%						0%	2%	3%		1%	
	GVB Promo	0%	1%							1%			1%	
	Total	Count	344	144	65	14	16	34	101	230	86	31	18	161

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$704.99

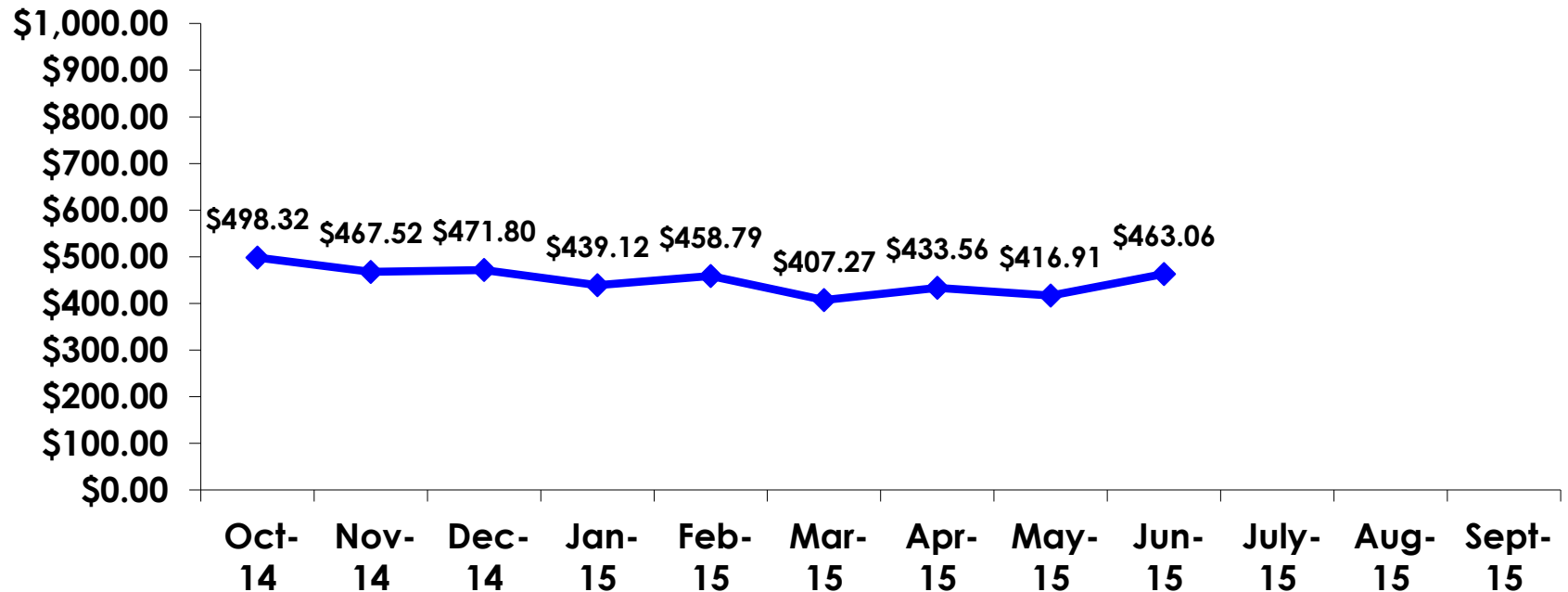
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$599.47	\$723.17	\$482.77	\$313.60	\$605.93	\$779.25	\$626.96	\$571.07	\$649.57	\$515.62	\$1,267.42	\$631.29
	Median	\$587	\$686	\$549	\$0	\$686	\$626	\$592	\$565	\$646	\$592	\$1,009	\$581
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$6,864	\$6,864	\$1,373	\$1,292	\$2,019	\$6,864	\$1,655	\$6,864	\$1,655	\$1,056	\$6,864	\$6,864

PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,096.29	\$1,699.01	\$817.94	\$1,211.34	\$1,138.66	\$2,046.92	\$980.83	\$987.82	\$1,463.15	\$1,994.67	\$2,472.21	\$1,260.78
	Median	\$808	\$1,454	\$646	\$808	\$1,454	\$1,211	\$808	\$735	\$1,211	\$1,777	\$1,615	\$808
AIR/ HOTEL/ MEAL	Mean	\$1,535.38	\$2,033.23	\$444.16	\$1,292.09	\$1,825.08	\$1,214.84	\$1,612.52	\$1,056.86	\$1,689.66	\$1,588.20	\$2,018.90	\$1,774.11
	Median	\$1,341	\$1,938	\$444	\$1,292	\$1,534	\$1,211	\$1,413	\$771	\$1,615	\$1,857	\$2,019	\$1,615
AIR ONLY	Mean	\$1,024.92	\$1,311.97	\$600.29	.	\$1,432.07	\$242.27	\$348.60	\$899.16	\$987.02	\$2,126.57	\$2,422.68	\$674.24
	Median	\$808	\$1,050	\$565	.	\$178	\$242	\$404	\$565	\$888	\$1,777	\$2,423	\$565
HOTEL ONLY	Mean	\$593.00	\$693.69	\$314.95	.	\$976.61	.	\$103.37	\$220.19	\$588.36	\$834.48	.	\$418.52
	Median	\$565	\$727	\$315	.	\$808	.	\$103	\$242	\$727	\$242	.	\$279
HOTEL & MEAL	Mean	\$161.51	\$161.51	.	.	\$161.51	.	.	.	.	.	.	\$161.51
	Median	\$162	\$162	.	.	\$162	.	.	.	.	.	.	\$162
F&B HOTEL	Mean	\$247.72	\$407.82	\$44.42	.	.	\$130.82	\$807.56	\$87.62	\$407.82	.	.	\$407.82
	Median	\$88	\$408	\$44	.	.	\$131	\$808	\$88	\$408	.	.	\$408
TRANS- JAPAN	Mean	\$42.38	\$55.79	\$44.95	.	\$96.91	\$54.51	\$48.18	\$36.06	\$52.73	\$20.19	.	\$50.07
	Median	\$30	\$28	\$32	.	\$97	\$55	\$30	\$30	\$26	\$20	.	\$32
TRANS- GUAM	Mean	\$72.68	\$68.64	.	.	.	.	.	\$32.30	\$86.14	\$68.64	.	\$69.99
	Median	\$69	\$69	.	.	.	.	.	\$32	\$81	\$69	.	\$57
OPT TOURS	Mean	\$219.19	\$251.77	\$152.28	.	\$145.36	\$411.85	\$274.97	\$231.26	\$214.81	\$129.21	\$605.67	\$210.97
	Median	\$162	\$170	\$81	.	\$16	\$412	\$242	\$162	\$166	\$133	\$606	\$141
OTHER	Mean	\$275.78	\$511.79	\$101.75	.	.	\$161.51	\$304.45	\$141.22	\$564.14	\$242.27	\$586.83	\$401.28
	Median	\$162	\$307	\$81	.	.	\$162	\$242	\$81	\$371	\$242	\$808	\$283
TOTAL	Mean	\$1,033.49	\$1,628.45	\$634.71	\$414.55	\$1,503.86	\$1,530.28	\$1,018.59	\$862.83	\$1,322.78	\$1,737.29	\$2,472.03	\$1,152.31
	Median	\$763	\$1,421	\$585	\$0	\$1,211	\$767	\$783	\$646	\$1,211	\$1,777	\$1,817	\$808

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$450.66

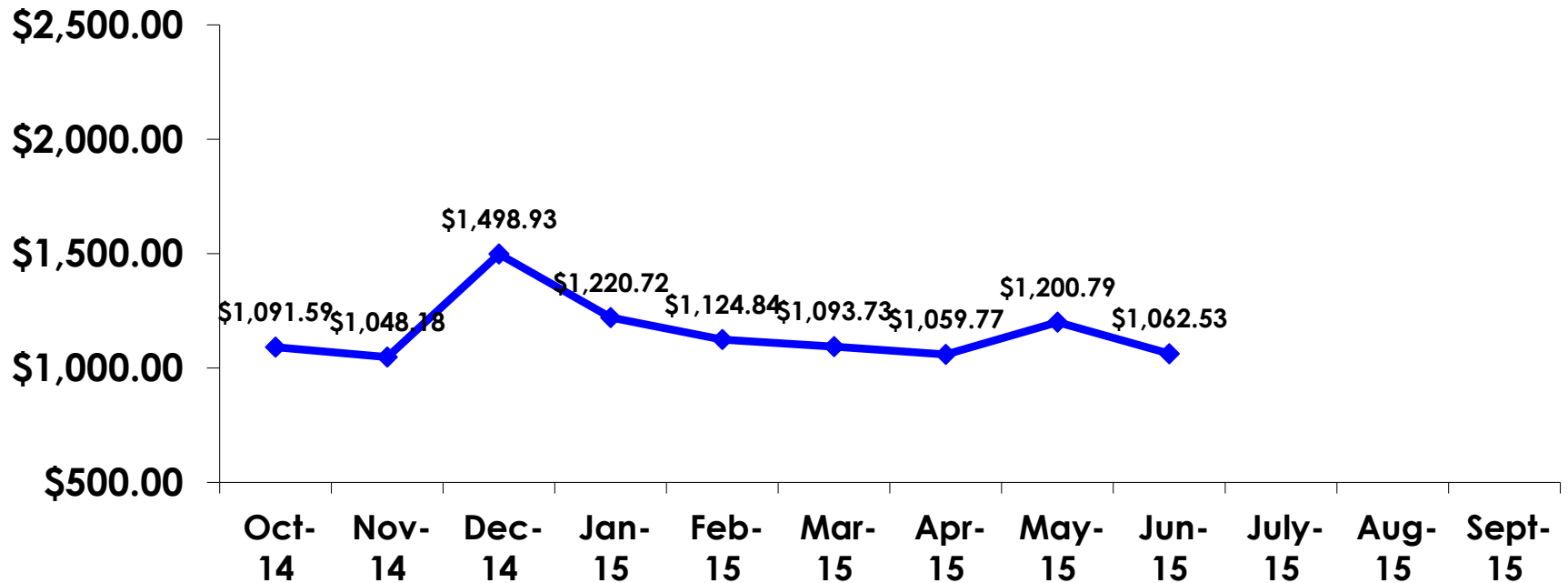
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$463.06	\$510.07	\$473.26	\$268.00	\$567.94	\$397.21	\$436.74	\$422.82	\$549.23	\$436.16	\$490.56	\$497.88
	Median	\$350	\$350	\$440	\$250	\$400	\$327	\$300	\$320	\$400	\$250	\$300	\$365
	Minimum	\$0	\$0	\$0	\$0	\$0	\$175	\$0	\$0	\$0	\$0	\$175	\$0
	Maximum	\$3,500	\$3,500	\$2,000	\$600	\$1,550	\$1,133	\$2,500	\$3,000	\$3,500	\$3,000	\$1,400	\$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	\$36.10	\$67.88	\$16.03	\$8.00	\$131.71	\$49.97	\$24.19	\$23.20	\$49.83	\$86.06	\$55.89	\$32.80
F&B FF/STORE	Mean	\$27.28	\$35.16	\$12.95	\$6.67	\$20.88	\$18.68	\$24.56	\$21.56	\$39.94	\$18.55	\$40.28	\$29.43
F&B RESTRNT	Mean	\$84.25	\$137.33	\$56.98	\$13.33	\$181.76	\$53.53	\$73.82	\$59.55	\$133.60	\$96.45	\$141.67	\$89.71
OPT TOUR	Mean	\$63.14	\$90.74	\$39.95	\$21.33	\$80.59	\$21.56	\$86.91	\$51.43	\$85.56	\$40.32	\$159.44	\$66.44
GIFT- SELF	Mean	\$194.30	\$284.79	\$163.08	\$18.00	\$252.94	\$113.65	\$139.36	\$161.35	\$280.45	\$516.77	\$123.89	\$282.35
GIFT- OTHER	Mean	\$98.91	\$138.32	\$61.74	\$8.00	\$173.24	\$61.76	\$82.29	\$78.00	\$138.31	\$127.74	\$189.39	\$112.30
TRANS	Mean	\$15.93	\$27.81	\$5.94	\$6.67	\$50.88	\$11.76	\$8.60	\$8.22	\$31.33	\$6.13	\$12.22	\$15.65
OTHER	Mean	\$221.02	\$305.12	\$229.09	\$236.00	\$183.29	\$359.97	\$160.22	\$176.50	\$338.51	\$387.00	\$247.22	\$241.68
TOTAL	Mean	\$741.86	\$1,087.07	\$585.08	\$318.00	\$1,075.29	\$690.88	\$600.20	\$580.79	\$1,097.53	\$1,279.03	\$970.00	\$873.40

TOTAL EXPENDITURES – TRACKING



YTD=\$1,155.65

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	\$1,062.53	\$1,233.24	\$956.02	\$581.60	\$1,173.87	\$1,176.45	\$1,063.70	\$993.89	\$1,198.80	\$951.78	\$1,757.97	\$1,129.17
	Median	\$986	\$1,145	\$993	\$300	\$1,103	\$1,008	\$1,046	\$938	\$1,142	\$864	\$1,449	\$1,029
	Minimum	\$0	\$0	\$0	\$100	\$200	\$225	\$0	\$0	\$0	\$0	\$200	\$0
	Maximum	\$7,264	\$7,264	\$2,020	\$1,442	\$3,569	\$7,264	\$2,952	\$7,264	\$4,509	\$3,269	\$7,264	\$7,264

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, May, Jun 2015, and Overall Oct-2014 - June 2015

	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Combi ned Oct- 2014 - Jun 2015
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks		3			3	2		2		3
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		2
Variety of shopping		4		2					4	
Price of things on Guam										
Quality of hotel accommodations			2		5	1	4			5
Quality/cleanliness of air, sky							1	4	1	
Quality/cleanliness of parks		1								
Quality of landscape in Tumon	2							1	3	8
Quality of landscape in Guam		2	1	1	1		3			1
Quality of ground handler	1						2		2	7
Quality/cleanliness of transportation vehicles			3	3	2			5		4
% of Overall Satisfaction Accounted For	47.0%	52.7%	37.9%	35.6%	44.5%	33.0%	45.6%	53.5%	50.6%	43.1%

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 June 2015 Period. By rank order they are:
 - **Quality/cleanliness of air, sky,**
 - **Quality of ground handler,**
 - **Quality of landscape in Tumon, and**
 - **Variety of shopping.**
- With all four factors the overall r^2 is .506 meaning that **50.6% 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, May, Jun 2015 and Overall Oct-2014-Jun 2015

	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Combi ned Oct- 2014- Jun 2015
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks										2
Ease of getting around			1							
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		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%	1.7%	0.0%	0.8%

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 June 2015 Period.