



# **GUAM VISITORS BUREAU**

## **Japan Visitor Tracker Exit Profile**

### **FY2015 Market Segmentation**

#### **OCTOBER 2014**



**Prepared by: QMark Research**

Information contained herein is the property of the Guam Visitors Bureau.

The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.<sup>1</sup>

---

# 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 **350** 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 **350** 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

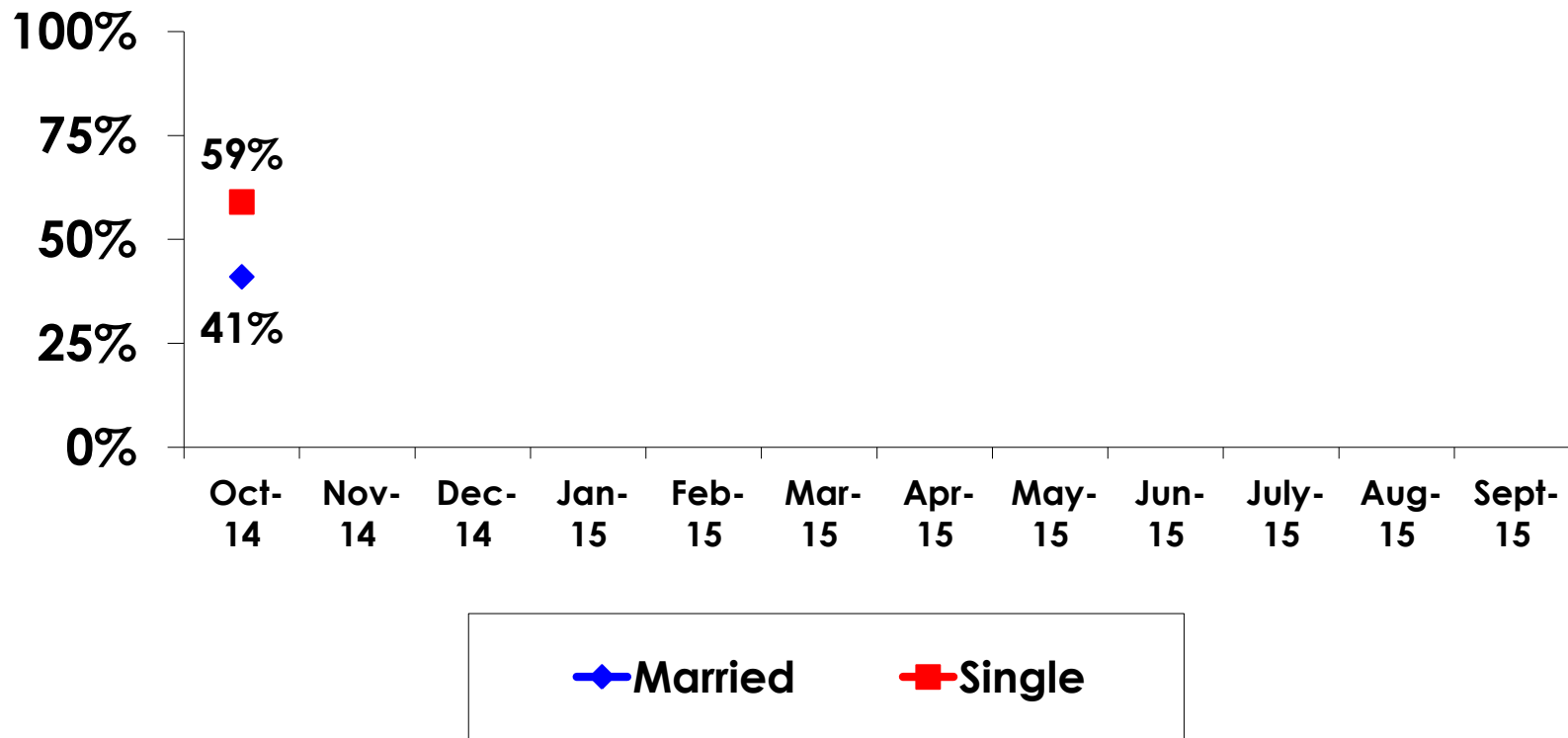
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

# 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
<b>Families</b>	36%											
<b>Office Lady</b>	13%											
<b>Group</b>	5%											
<b>Silver</b>	2%											
<b>Wedding</b>	9%											
<b>Sport</b>	32%											
<b>18-35</b>	71%											
<b>36-55</b>	25%											
<b>Child</b>	11%											
<b>Honey-moon</b>	4%											
<b>Repeat</b>	43%											
<b>TOTAL</b>	<b>350</b>											

# SECTION 1 **PROFILE OF RESPONDENTS**

# MARITAL STATUS - TRACKING

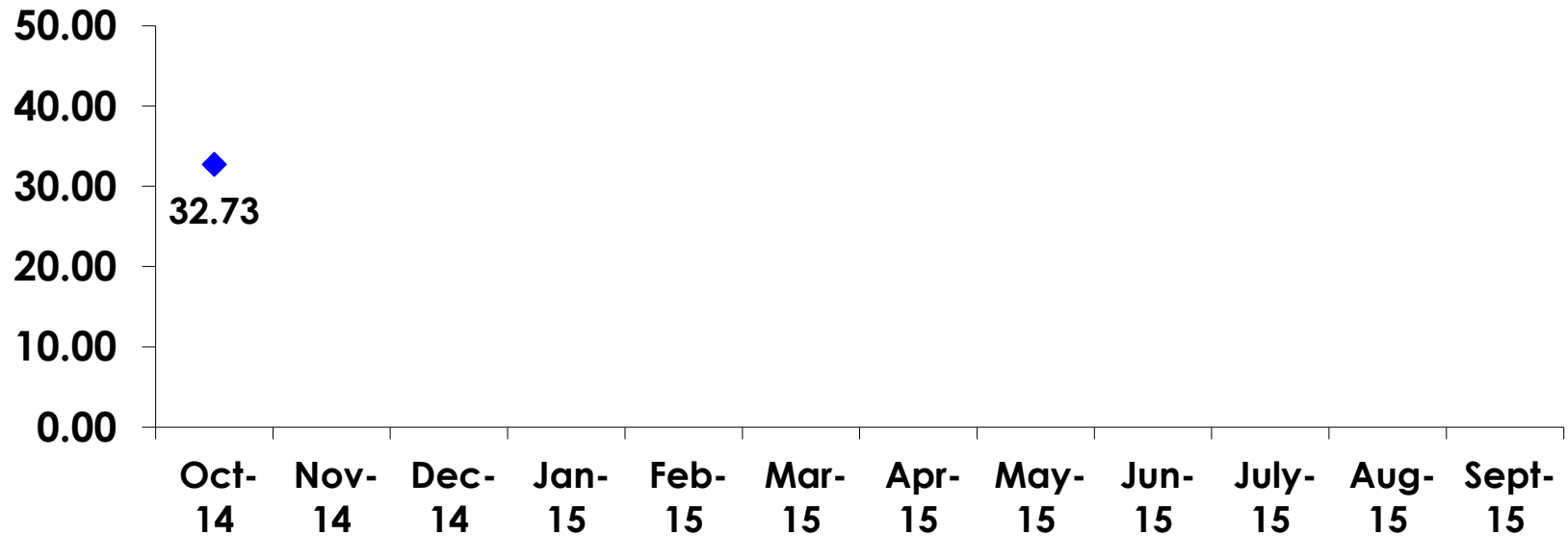


# MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	41%	82%	23%	38%	75%	74%	38%	25%	80%	90%	100%	46%
	Single	59%	18%	77%	63%	25%	26%	63%	75%	20%	10%		54%
	Total Count	350	127	44	16	8	31	112	247	86	39	15	151



# AVERAGE AGE - TRACKING



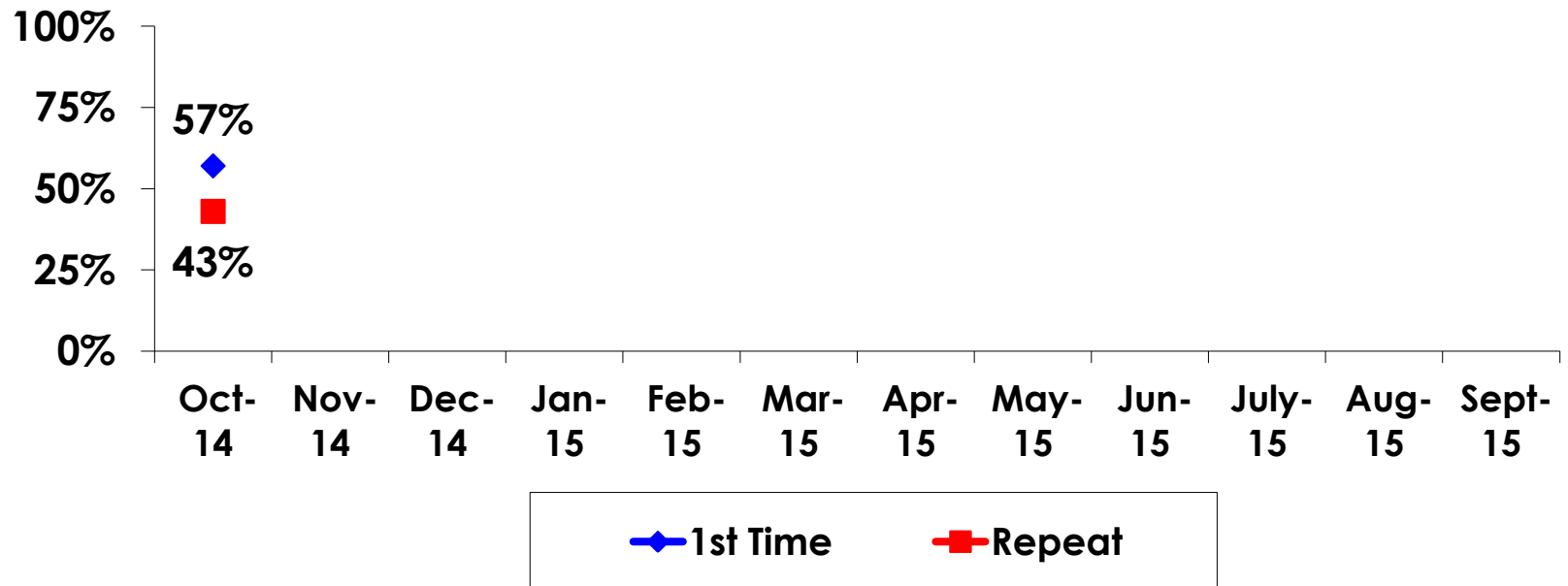
# AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	21%	6%	20%	13%		3%	24%	30%			7%	15%
	25-34	47%	43%	50%	44%		55%	46%	67%		21%	73%	46%
	35-49	22%	36%	25%	38%		23%	22%	3%	81%	74%	20%	27%
	50+	9%	14%	5%	6%	100%	19%	7%		19%	5%		13%
	Total Count	350	127	44	16	8	31	112	247	86	39	15	151
QF	Mean	32.73	37.02	31.84	34.19	63.50	37.39	31.71	26.98	43.79	40.15	31.47	34.97
	Median	29	35	28	31	63	33	29	26	43	39	30	32

# INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	6%	4%		7%			3%	8%		3%	7%	4%
	Y2.0M-Y3.0M	14%	8%	22%	21%	14%	14%	11%	14%	12%	8%	13%	11%
	Y3.0M-Y4.0M	16%	14%	25%	29%		29%	17%	16%	18%	19%	13%	16%
	Y4.0M-Y5.0M	17%	20%	11%	21%	29%	21%	24%	18%	16%	8%	47%	17%
	Y5.0M-Y7.0M	20%	21%	19%		43%	18%	25%	20%	20%	25%	7%	21%
	Y7.0M-Y10.0M	13%	18%	17%	14%		4%	11%	11%	20%	22%	13%	16%
	Y10.0M+	11%	14%	6%	7%	14%	14%	8%	9%	14%	14%		15%
	No Income	2%	1%					2%	3%				2%
	Total Count	294	111	36	14	7	28	102	203	76	36	15	131

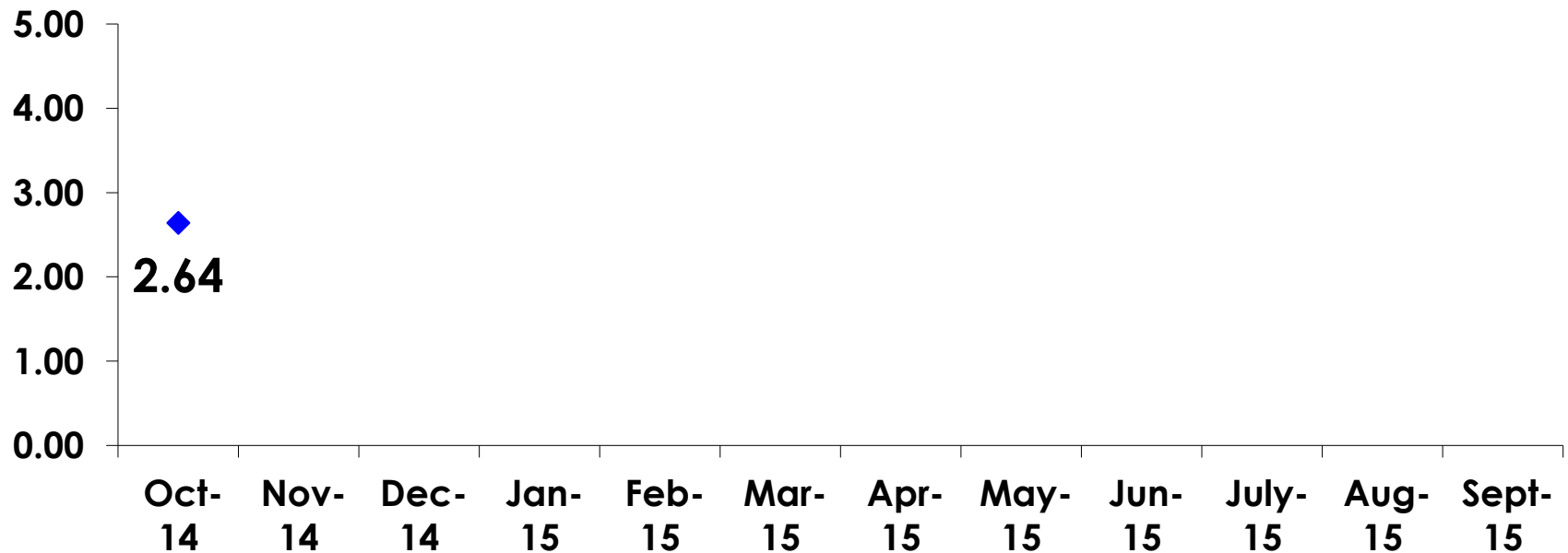
# PRIOR TRIPS TO GUAM - TRACKING



# PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	57%	50%	57%	63%	63%	55%	66%	62%	45%	31%	87%	
	No	43%	50%	43%	38%	38%	45%	34%	38%	55%	69%	13%	100%
	Total Count	350	127	44	16	8	31	112	247	86	39	15	151

# 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	2.64	2.98	2.57	2.31	3.00	3.00	2.74	2.57	2.73	3.08	3.53	2.71
	Median	2	3	3	2	3	3	3	2	3	3	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	62%	67%	68%		38%	57%	68%	67%	53%	64%	67%	60%
	Full package tour	20%	22%	18%		38%	23%	17%	20%	17%	23%	33%	22%
	Individually arranged travel (FIT)	7%	11%	9%		13%	13%	6%	5%	14%	13%		9%
	Company paid travel	5%		5%		13%	3%	5%	4%	7%			5%
	Group tour	5%			100%			5%	4%	8%			4%
	Other	1%					3%		1%				
	Total Count	347	126	44	16	8	30	111	245	86	39	15	149

# TRAVEL MOTIVATION - SEGMENTATION

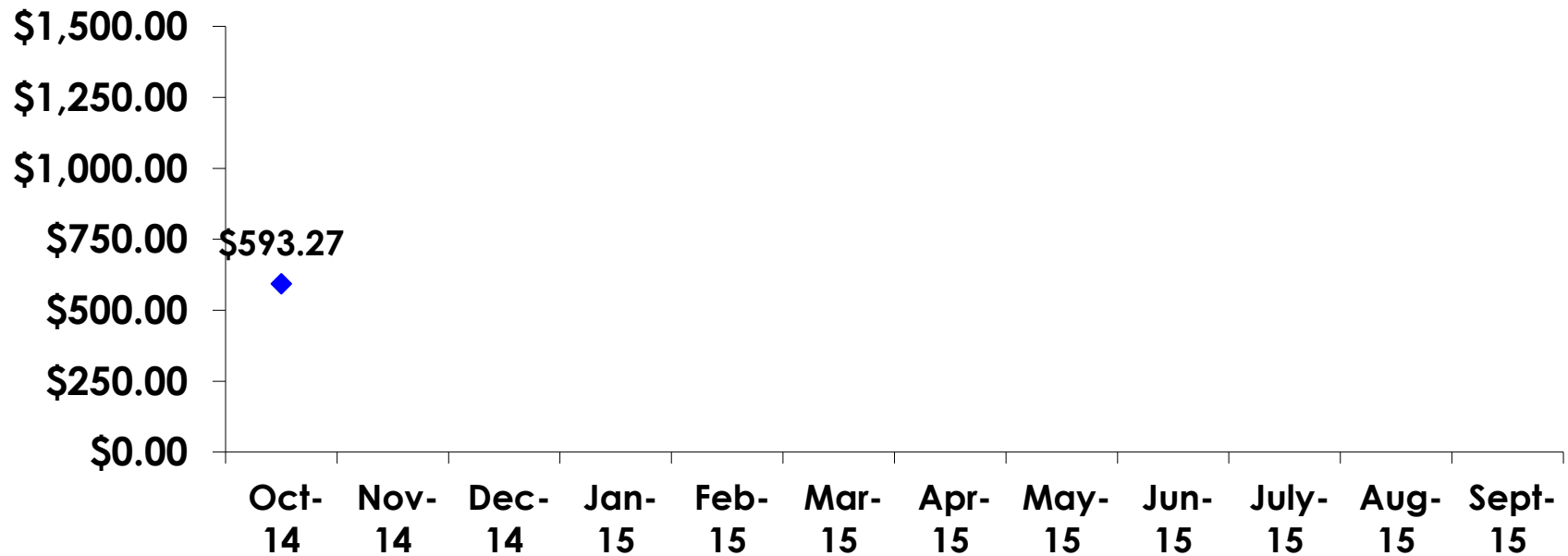
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	33%	35%	32%	25%	43%	19%	27%	29%	40%	49%	13%	75%
	Price	22%	19%	18%		14%		29%	24%	17%	21%	33%	23%
	Visit friends/ Relatives	2%	2%					1%	2%	1%	3%		1%
	Recomm- friend/family/trvl agnt	20%	6%	23%		14%	3%	20%	21%	16%			17%
	Scuba	6%	2%	7%				15%	7%	5%			3%
	Water sports	20%	21%	27%		14%		38%	22%	17%	18%	13%	21%
	Short travel time	42%	52%	50%	13%	14%	13%	43%	42%	42%	67%	47%	48%
	Golf	2%	4%	2%		14%		4%	2%	2%	3%		4%
	Relax	35%	35%	43%			16%	38%	40%	23%	31%	27%	39%
	Company/ Business Trip	13%	2%	14%	100%	14%	3%	16%	11%	21%			12%
	Company Sponsored	3%	3%	5%	6%			1%	2%	5%	3%		2%
	Safe	15%	19%	9%			3%	19%	14%	21%	28%	7%	19%
	Natural beauty	50%	50%	52%		14%	16%	57%	55%	40%	62%	53%	50%
	Shopping	27%	29%	32%		43%	6%	26%	29%	20%	31%	27%	30%
	Career Cert/ Testing	0%						1%	0%				
	Married/ Attn wedding	9%	17%			29%	100%	4%	7%	8%	8%	20%	9%
	Honeymoon	4%	12%				10%	4%	5%	3%	5%	100%	1%
	Pleasure	45%	39%	55%	13%		13%	55%	50%	40%	51%	33%	46%
	Organized sports	0%	1%					1%	0%				1%
	Other	3%	2%	2%				3%	3%	3%	5%		1%
	Total Count	349	126	44	16	7	31	112	247	86	39	15	151

# INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	79%	78%	80%	88%	43%	74%	88%	81%	78%	92%	73%	81%	
	Travel Guidebook- Bookstore	53%	53%	68%	38%	71%	61%	62%	52%	52%	46%	67%	50%	
	Travel Agent Brochure	38%	33%	39%	25%	43%	39%	42%	39%	36%	23%	53%	32%	
	Prior Trip	32%	35%	32%	38%	14%	26%	23%	28%	41%	51%	7%	75%	
	Friend/ Relative	31%	21%	32%	19%	14%	39%	31%	36%	21%	13%	67%	20%	
	Magazine (Consumer)	31%	31%	32%	19%	29%	23%	38%	32%	26%	26%	47%	27%	
	TV	10%	9%	18%		14%	13%	18%	11%	7%	5%	13%	10%	
	Co-Worker/ Company Trvl Dept	5%	2%	11%	13%		3%	4%	4%	7%	3%		4%	
	Consumer Trvl Show	2%		7%					3%				3%	
	GVB Office	1%	2%	2%	6%			1%	2%	1%			1%	
	GVB Promo	1%						1%	1%	1%			2%	
	Newspaper	1%	1%						0%				1%	
	Other	0%								1%				
	Theater Ad	0%							0%					
	Total	Count	349	127	44	16	7	31	112	247	86	39	15	151

# SECTION 3 **EXPENDITURES**

# PREPAID EXPENDITURES - TRACKING

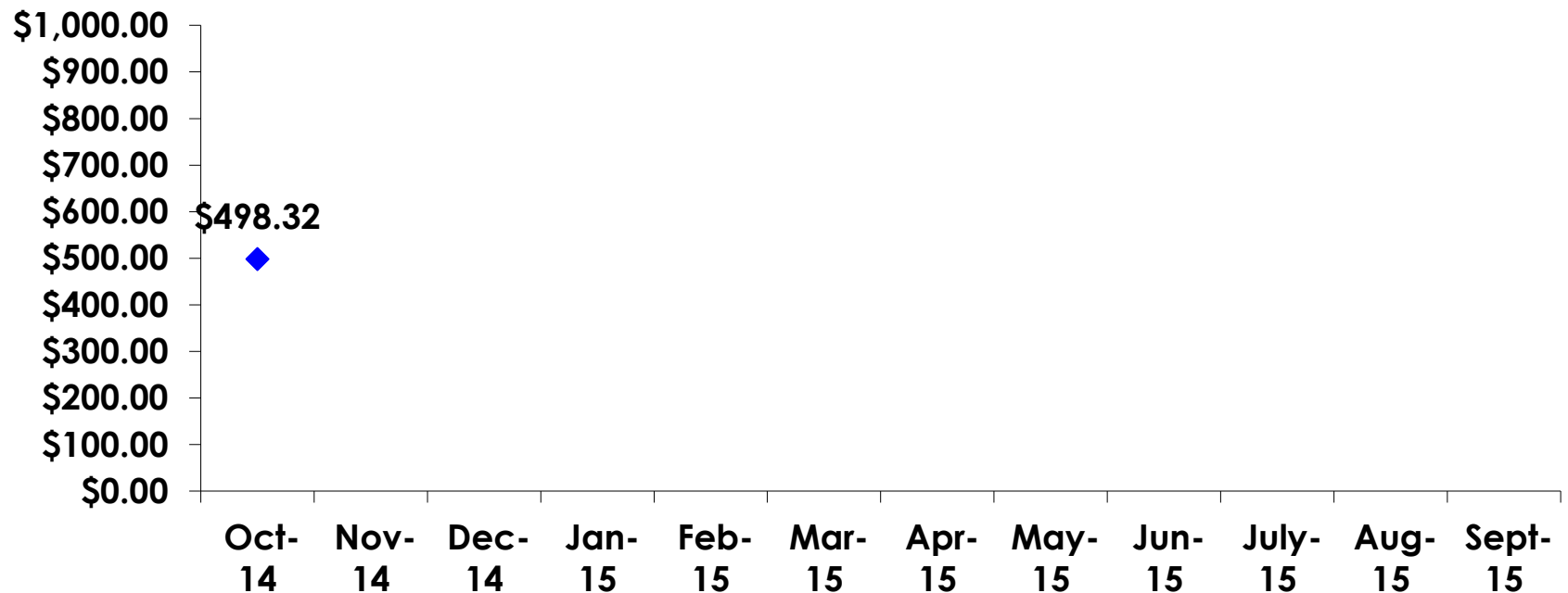


YTD=\$593.27

# 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	\$593.27	\$651.54	\$619.34	\$308.78	\$461.00	\$651.54	\$653.58	\$596.02	\$599.50	\$720.18	\$879.77	\$588.77
	Median	\$605	\$648	\$605	\$173	\$501	\$648	\$605	\$605	\$605	\$662	\$691	\$605
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$345	\$0	\$0
	Maximum	\$1,857	\$1,857	\$1,296	\$950	\$1,123	\$1,727	\$1,382	\$1,857	\$1,382	\$1,727	\$1,857	\$1,727

# ON-ISLAND EXPENDITURES - TRACKING



YTD = \$498.32

# ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

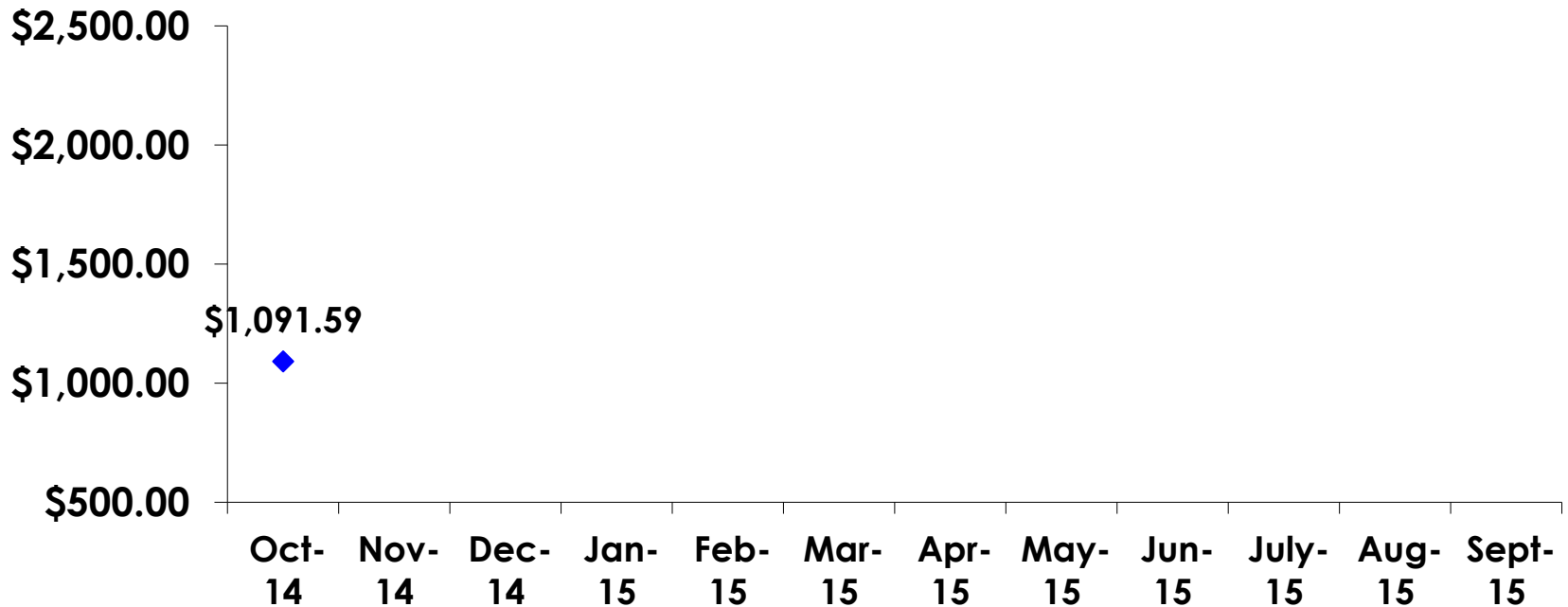
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$498.32	\$453.78	\$660.18	\$434.88	\$383.44	\$448.44	\$458.62	\$493.48	\$528.11	\$358.11	\$500.84	\$504.82
	Median	\$400	\$300	\$518	\$475	\$300	\$400	\$400	\$400	\$425	\$250	\$500	\$400
	Minimum	\$0	\$0	\$0	\$160	\$0	\$0	\$0	\$0	\$0	\$0	\$241	\$0
	Maximum	\$3,100	\$3,000	\$2,000	\$700	\$1,150	\$2,000	\$2,000	\$3,000	\$3,100	\$1,500	\$1,100	\$3,100



# 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	\$27.81	\$40.63	\$20.23	\$38.50	\$43.75	\$62.68	\$33.31	\$21.02	\$37.69	\$34.77	\$60.20	\$26.31
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$26.20	\$41.07	\$28.75	\$22.00	\$0.63	\$26.16	\$27.97	\$21.47	\$43.17	\$40.38	\$54.67	\$29.43
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$3	\$0	\$9	\$0	\$20	\$0
F&B RESTRNT	Mean	\$79.78	\$109.06	\$47.02	\$54.50	\$31.25	\$68.23	\$74.62	\$75.00	\$85.47	\$139.49	\$177.33	\$93.34
	Median	\$9	\$0	\$0	\$38	\$0	\$0	\$50	\$0	\$33	\$0	\$100	\$20
OPT TOUR	Mean	\$73.60	\$91.90	\$60.18	\$49.13	\$31.25	\$65.52	\$111.67	\$70.94	\$83.59	\$76.67	\$81.73	\$87.31
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$60	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$168.99	\$235.77	\$209.20	\$88.13	\$75.00	\$359.13	\$93.53	\$150.37	\$219.36	\$247.69	\$198.67	\$185.50
	Median	\$2	\$20	\$95	\$10	\$0	\$0	\$0	\$0	\$25	\$0	\$150	\$30
GIFT- OTHER	Mean	\$101.53	\$141.35	\$107.18	\$61.25	\$87.50	\$71.29	\$89.75	\$89.22	\$133.14	\$93.72	\$219.33	\$90.58
	Median	\$50	\$60	\$95	\$0	\$25	\$0	\$50	\$40	\$100	\$85	\$170	\$50
TRANS	Mean	\$11.25	\$13.36	\$15.02	\$0.31	\$33.75	\$9.03	\$14.28	\$9.58	\$13.93	\$17.13	\$13.33	\$12.52
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$211.92	\$286.79	\$272.68	\$121.06	\$349.38	\$170.55	\$163.20	\$188.02	\$284.13	\$463.21	\$207.53	\$244.98
	Median	\$0	\$0	\$0	\$0	\$25	\$30	\$0	\$0	\$0	\$30	\$0	\$0
TOTAL	Mean	\$700.80	\$957.65	\$760.27	\$434.88	\$652.50	\$832.58	\$608.95	\$626.55	\$896.29	\$1,113.05	\$1,012.80	\$766.86
	Median	\$500	\$710	\$665	\$475	\$550	\$650	\$500	\$500	\$600	\$1,000	\$900	\$550

# TOTAL EXPENDITURES – TRACKING



YTD=\$1,091.59

# 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	\$1,091.59	\$1,105.32	\$1,279.52	\$743.65	\$844.44	\$1,099.98	\$1,112.20	\$1,089.50	\$1,127.62	\$1,078.29	\$1,380.62	\$1,093.59
	Median	\$1,022	\$1,034	\$1,147	\$698	\$735	\$1,061	\$1,047	\$1,027	\$1,035	\$1,006	\$1,480	\$1,045
	Minimum	\$0	\$0	\$0	\$160	\$0	\$0	\$50	\$0	\$200	\$499	\$241	\$0
	Maximum	\$3,864	\$3,432	\$3,296	\$1,650	\$1,677	\$2,330	\$3,209	\$3,864	\$3,644	\$2,882	\$2,622	\$3,644

# 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.

<b>Drivers of Overall Satisfaction, October 2014</b>	
Drivers:	<b>rank</b>
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	
Quality of shopping	<b>3</b>
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	<b>2</b>
Quality of landscape in Guam	
Quality of ground handler	<b>1</b>
Quality/cleanliness of transportation vehicles	
% of Overall Satisfaction Accounted For	<b>47.0%</b>
NOTE: Only significant drivers are included.	

---

# DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by three significant factors in the October 2014 Period. By rank order they are:
  - **Quality of ground handler,**
  - **Quality of landscape in Tumon, and**
  - **Quality of shopping.**
- With all three factors the overall  $r^2$  is .47 meaning that **47.0% of overall satisfaction is accounted for by these factors.**

<b>Drivers of Per Person On Island Expenditures, Oct 2014</b>	
<b>Drivers:</b>	<b>rank</b>
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	
Quality of shopping	
Variety of shopping	
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	<b>0.0%</b>
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 October 2014 Period.