



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2016 Market Segmentation

### OCTOBER 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 **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

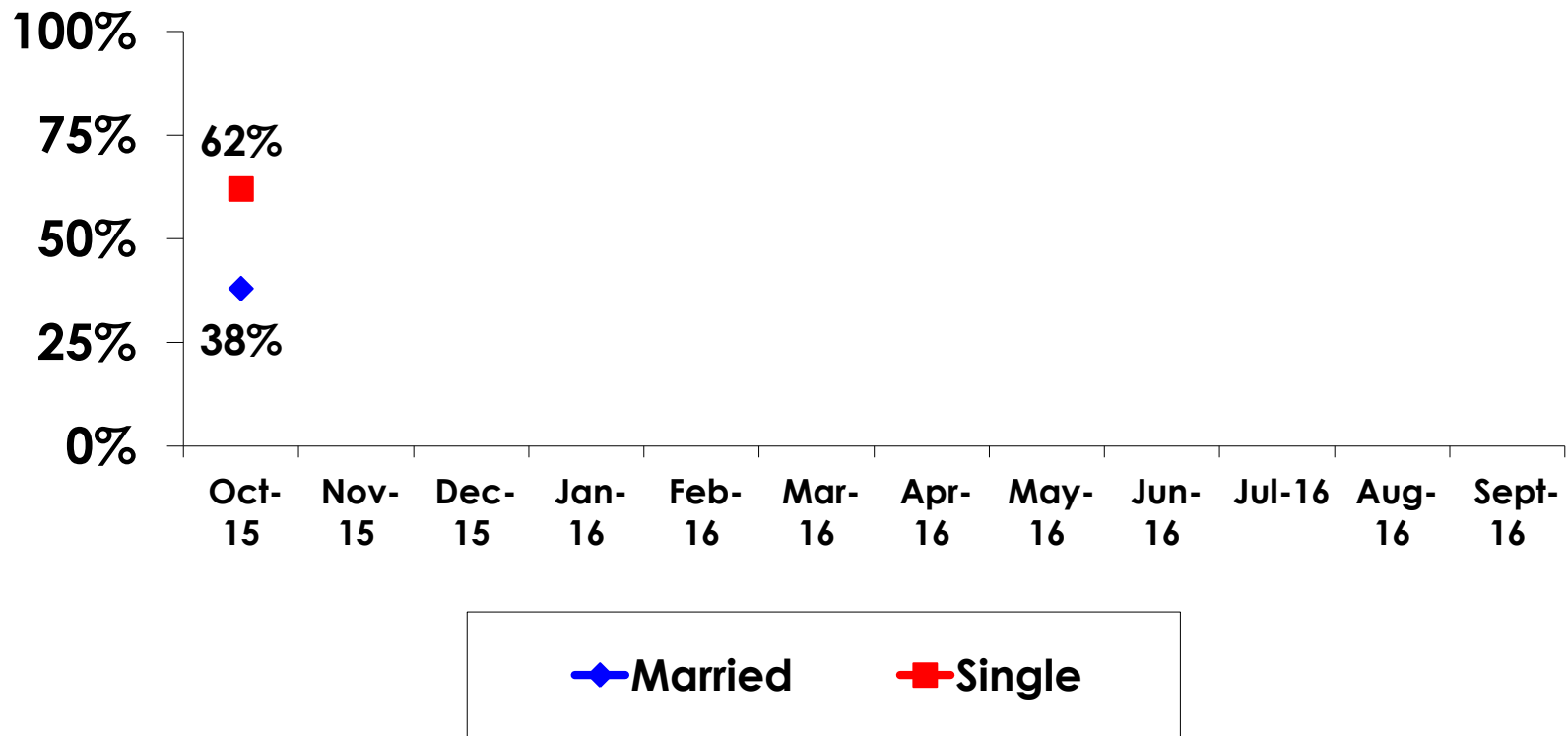
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

# Highlighted Segments

	Oct 15	Nov 15	Dec 15	Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16	July 16	Aug 16	Sept 16
<b>Families</b>	31%											
<b>Office Lady</b>	9%											
<b>Group</b>	5%											
<b>Silver</b>	6%											
<b>Wedding</b>	7%											
<b>Sport</b>	31%											
<b>18-35</b>	73%											
<b>36-55</b>	19%											
<b>Child</b>	6%											
<b>Honey-moon</b>	7%											
<b>Repeat</b>	35%											
<b>TOTAL</b>	<b>351</b>											

# SECTION 1 **PROFILE OF RESPONDENTS**

# MARITAL STATUS - TRACKING

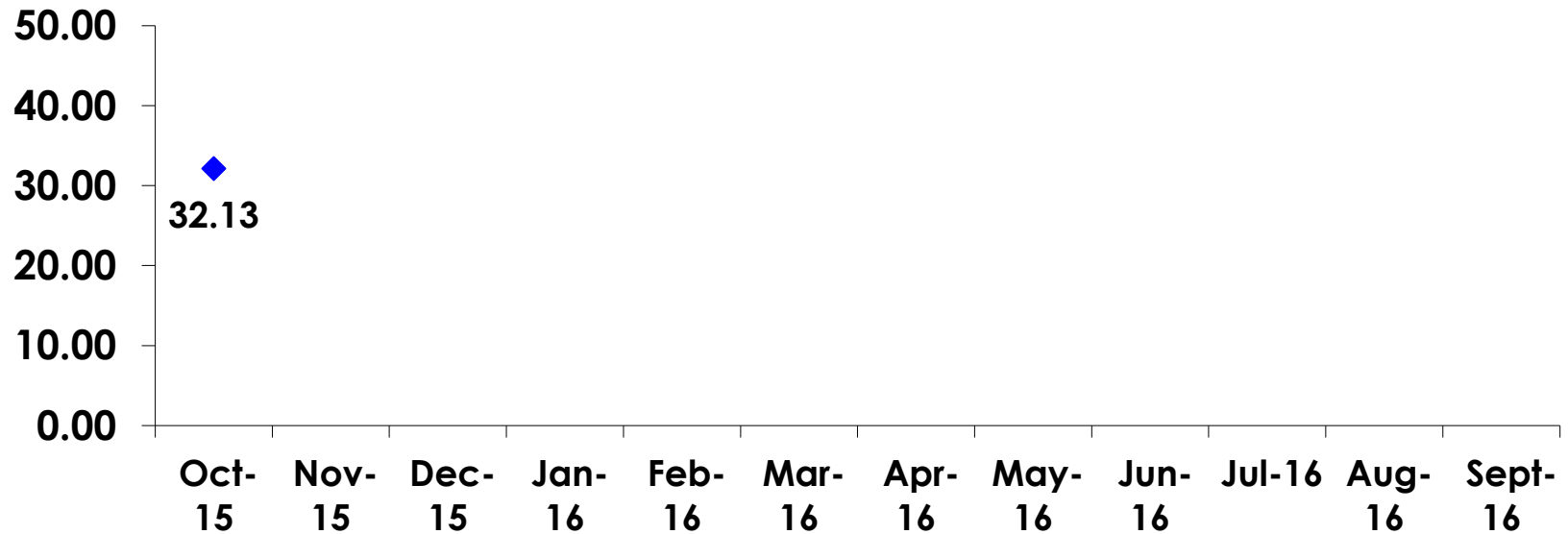


# MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	38%	83%	33%	44%	86%	52%	29%	21%	80%	95%	100%	46%
	Single	62%	17%	67%	56%	14%	48%	71%	79%	20%	5%		54%
	Total Count	349	106	33	16	21	23	108	255	66	22	23	123



# AVERAGE AGE - TRACKING



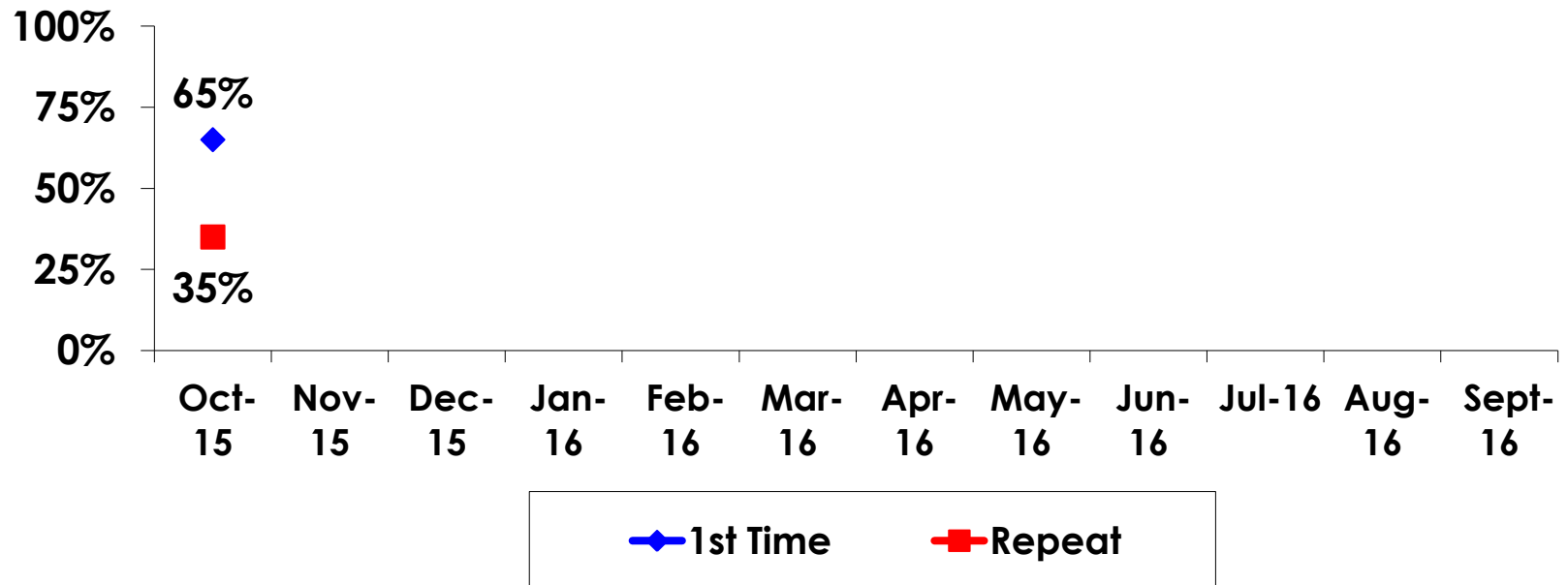
# AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	31%	9%	18%	35%		13%	31%	43%			4%	22%
	25-34	39%	44%	61%	24%		57%	47%	54%		32%	83%	31%
	35-49	16%	28%	9%	18%		9%	13%	3%	74%	55%	13%	24%
	50+	13%	18%	12%	24%	100%	22%	8%		26%	14%		23%
	Total Count	350	106	33	17	21	23	108	256	66	22	23	124
QF	Mean	32.13	36.86	31.42	34.53	62.52	34.52	30.18	25.82	44.26	39.32	30.04	36.48
	Median	28	33	28	27	62	28	27	25	44	36	29	32

# INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	7%	3%	3%	13%	10%	5%	8%	8%	2%		9%	6%
	Y2.0M-Y3.0M	15%	12%	30%	13%	5%	10%	19%	18%	6%		17%	12%
	Y3.0M-Y4.0M	16%	9%	17%	20%	24%	24%	19%	17%	11%	5%	13%	10%
	Y4.0M-Y5.0M	15%	19%	13%	13%	10%	24%	14%	14%	22%	27%	22%	17%
	Y5.0M-Y7.0M	21%	26%	17%	13%	29%	29%	17%	20%	22%	27%	30%	25%
	Y7.0M-Y10.0M	13%	17%	10%	20%	19%	10%	10%	12%	17%	23%	4%	18%
	Y10.0M+	12%	15%	10%	7%	5%		11%	10%	19%	18%	4%	11%
	No Income	1%						1%	2%				2%
	Total Count	312	102	30	15	21	21	105	222	63	22	23	109

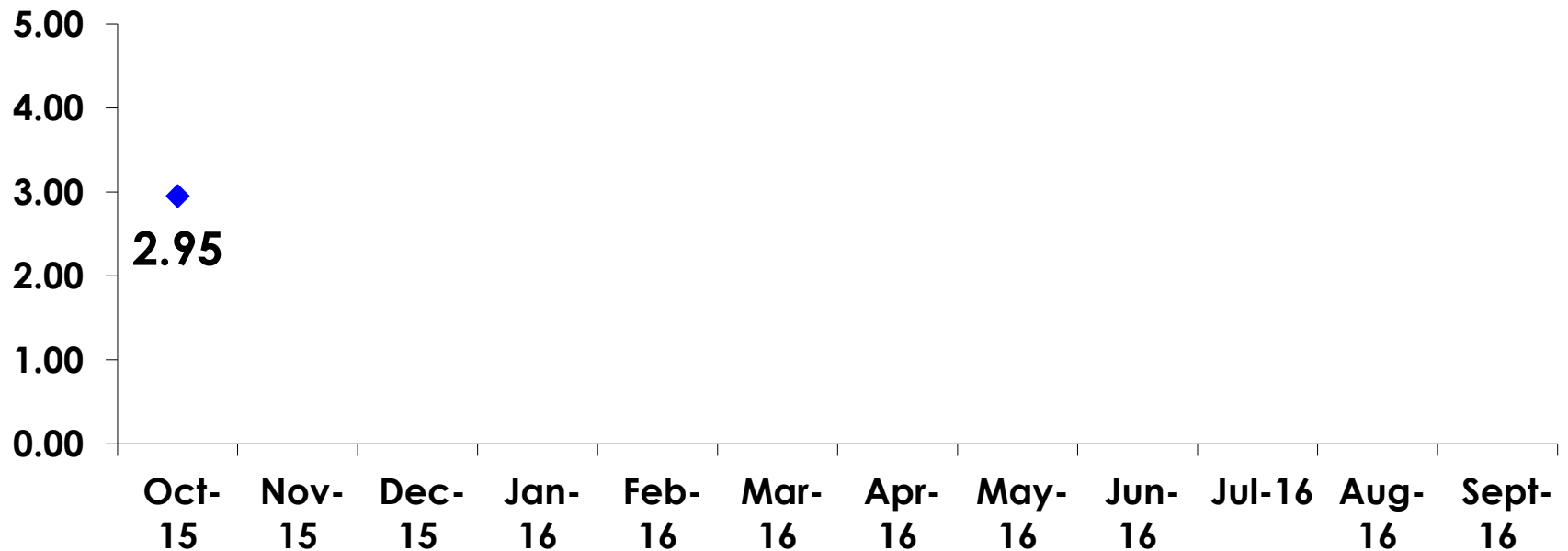
# PRIOR TRIPS TO GUAM - TRACKING



# PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	65%	61%	73%	41%	38%	65%	71%	72%	45%	36%	83%	
	No	35%	39%	27%	59%	62%	35%	29%	28%	55%	64%	17%	100%
	Total Count	351	107	33	17	21	23	108	256	66	22	23	124

# 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	2.95	3.35	2.97	2.53	3.48	2.91	3.08	2.88	3.09	3.29	3.61	3.10
	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%	59%	82%		29%	43%	64%	68%	49%	59%	61%	58%	
	Full package tour	21%	28%	15%		38%	39%	21%	20%	20%	14%	30%	15%	
	Individually arranged travel (FIT)	7%	10%	3%		24%	17%	7%	4%	15%	23%	4%	12%	
	Group tour	5%			100%	10%		3%	4%	8%			8%	
	Company paid travel	4%						3%	4%	6%			6%	
	Other	1%	2%					1%	1%	2%	5%	4%	2%	
	Total	Count	347	106	33	17	21	23	107	253	65	22	23	124

# TRAVEL MOTIVATION - SEGMENTATION

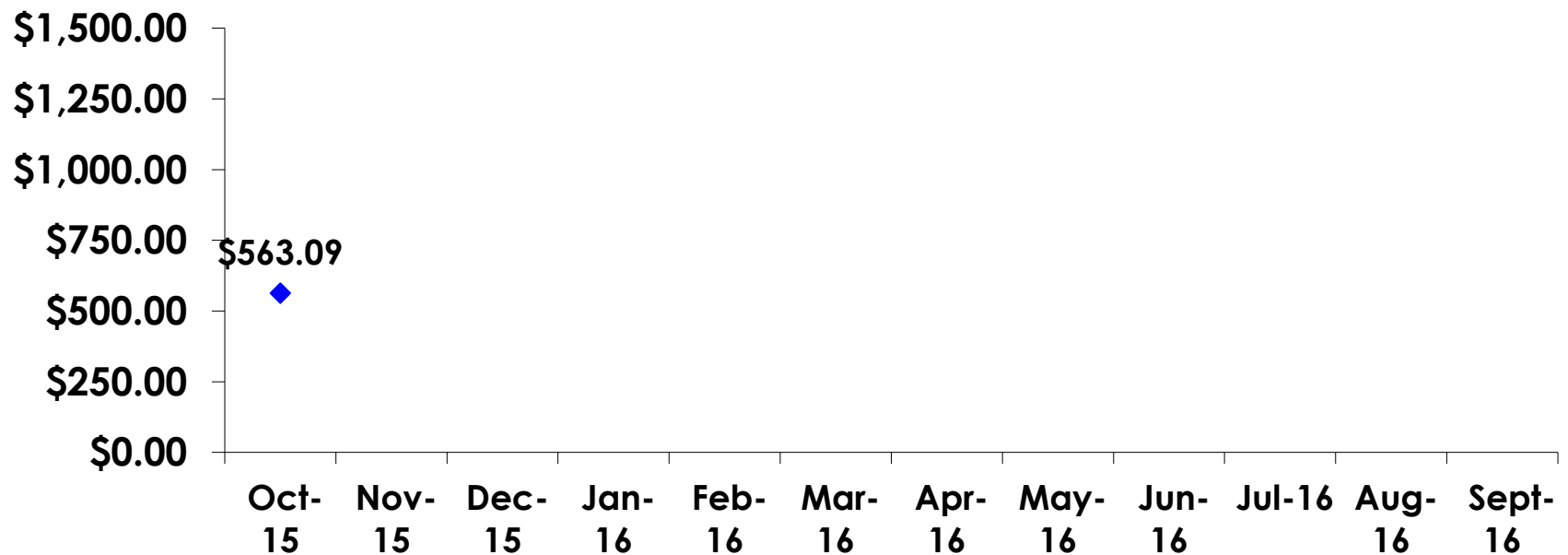
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	27%	30%	21%	47%	43%	30%	21%	20%	45%	50%	17%	76%
	Price	22%	18%	27%		24%	4%	23%	25%	9%	18%	13%	16%
	Visit friends/ Relatives	2%		3%				4%	3%	2%			2%
	Recomm- friend/family/trvl agnt	23%	19%	24%	6%	19%		24%	24%	18%	32%	9%	12%
	Scuba	6%	4%	3%		5%		16%	7%	5%	9%		8%
	Water sports	22%	14%	30%		10%	4%	38%	25%	17%	9%	13%	11%
	Short travel time	49%	55%	64%	12%	43%	26%	49%	50%	47%	68%	48%	42%
	Golf	2%	4%			14%		5%	0%	6%	5%	4%	5%
	Relax	36%	36%	33%		24%	9%	39%	36%	41%	41%	13%	35%
	Company/ Business Trip	12%	1%		88%	10%		8%	9%	26%			18%
	Company Sponsored	1%	1%					1%	0%	2%			1%
	Safe	21%	30%	18%	12%	24%	9%	27%	22%	17%	50%	26%	19%
	Natural beauty	58%	51%	67%	35%	33%	17%	65%	63%	47%	73%	30%	52%
	Shopping	27%	27%	36%	6%	5%	22%	25%	29%	21%	36%	17%	27%
	Married/ Attn wedding	7%	14%	6%		10%	100%	4%	6%	5%	5%	17%	6%
	Honeymoon	7%	21%	3%			17%	8%	8%	3%		100%	3%
	Pleasure	44%	38%	39%	12%	19%	17%	50%	50%	33%	50%	26%	38%
	Organized sports	1%				5%		1%	1%	2%			1%
	Other	2%	3%			10%		3%	1%	3%	5%		4%
	Total	Count	347	107	33	17	21	23	107	252	66	22	23

# INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	80%	81%	79%	82%	62%	83%	82%	82%	80%	91%	87%	77%	
	Travel Guidebook-Bookstore	51%	55%	70%	35%	33%	65%	53%	56%	35%	50%	43%	46%	
	Travel Agent Brochure	37%	40%	45%	12%	38%	30%	51%	41%	22%	32%	61%	24%	
	Friend/ Relative	36%	28%	36%	41%	43%	17%	43%	40%	23%	36%	39%	24%	
	Magazine (Consumer)	31%	38%	27%	18%	19%	35%	44%	31%	34%	36%	48%	30%	
	Prior Trip	24%	25%	18%	29%	52%	17%	23%	18%	32%	36%	13%	67%	
	TV	11%	9%	18%	18%		4%	10%	11%	14%	9%	9%	11%	
	Co-Worker/ Company Trvl Dept	6%	2%	6%	24%		4%	9%	6%	8%		4%	2%	
	GVB Promo	1%	3%	3%		5%			1%		5%		2%	
	Other	1%	1%			5%	4%			2%			1%	
	Consumer Trvl Show	1%	1%			5%		2%	0%		5%		1%	
	Travel Trade Show	0%	1%					1%	0%					
	Radio	0%							0%					
	GVB Office	0%							0%					
	Newspaper	0%			6%					2%			1%	
	Total	Count	350	107	33	17	21	23	108	256	65	22	23	123

# SECTION 3 **EXPENDITURES**

# PREPAID EXPENDITURES - TRACKING



YTD=\$563.09

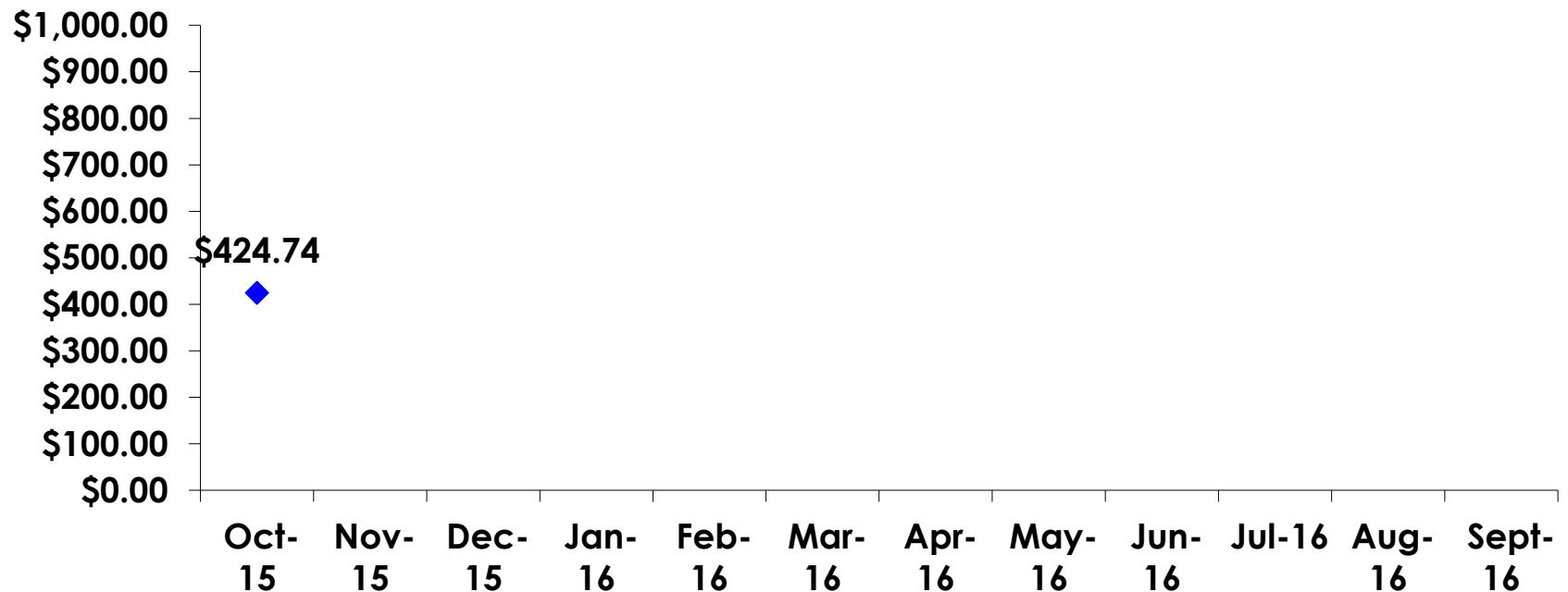
# PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$563.09	\$659.56	\$629.35	\$154.01	\$522.66	\$737.83	\$641.58	\$557.87	\$588.54	\$614.89	\$895.78	\$539.80
	Median	\$582	\$623	\$582	\$0	\$665	\$696	\$582	\$561	\$582	\$582	\$831	\$525
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$2,494	\$2,494	\$1,662	\$831	\$1,039	\$2,494	\$1,496	\$2,494	\$1,662	\$1,247	\$2,494	\$1,662

# PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,054.88	\$1,748.30	\$870.59	\$1,038.98	\$1,088.85	\$2,618.24	\$1,106.08	\$877.73	\$1,736.14	\$2,573.48	\$1,850.77	\$1,318.07
	Median	\$665	\$1,413	\$582	\$1,039	\$790	\$831	\$810	\$623	\$1,027	\$2,036	\$1,662	\$831
AIR/ HOTEL/ MEAL	Mean	\$1,691.09	\$2,114.45	\$4,239.05	\$561.05	\$1,546.01	\$2,173.55	\$1,322.28	\$1,509.99	\$2,331.48	\$3,961.99	\$2,277.45	\$2,227.58
	Median	\$1,072	\$1,413	\$4,239	\$561	\$831	\$1,575	\$1,035	\$1,122	\$1,700	\$2,909	\$2,078	\$1,371
AIR ONLY	Mean	\$873.61	\$1,227.78	.	.	\$1,872.94	.	\$694.95	\$379.91	\$1,063.92	\$1,658.22	\$581.83	\$1,170.78
	Median	\$748	\$815	.	.	\$2,327	.	\$748	\$382	\$831	\$1,662	\$582	\$798
HOTEL ONLY	Mean	\$783.39	\$1,274.49	.	.	\$1,662.37	.	.	\$735.60	\$554.12	\$1,080.54	\$1,662.37	\$735.60
	Median	\$515	\$1,662	.	.	\$1,662	.	.	\$474	\$499	\$1,081	\$1,662	\$474
HOTEL & MEAL	Mean	\$1,246.78	\$1,662.37	.	.	\$415.59	.	\$1,662.37	\$1,662.37	\$1,662.37	\$1,662.37	.	\$1,038.98
	Median	\$1,662	\$1,662	.	.	\$416	.	\$1,662	\$1,662	\$1,662	\$1,662	.	\$1,039
F&B HOTEL	Mean	\$166.24	.	.	.	.	.	\$166.24	\$166.24	.	.	.	.
	Median	\$166	.	.	.	.	.	\$166	\$166	.	.	.	.
TRANS- JAPAN	Mean	\$70.47	\$88.83	\$24.94	.	\$83.12	\$38.44	\$86.29	\$75.73	\$53.84	\$124.68	\$20.78	\$48.65
	Median	\$33	\$83	\$25	.	\$83	\$42	\$22	\$31	\$66	\$83	\$21	\$42
TRANS- GUAM	Mean	\$47.79	\$58.18	.	.	.	.	\$37.40	\$37.40	\$58.18	\$58.18	.	\$47.79
	Median	\$48	\$58	.	.	.	.	\$37	\$37	\$58	\$58	.	\$48
OPT TOURS	Mean	\$164.05	\$198.45	\$138.53	\$83.12	\$83.12	\$170.39	\$186.81	\$156.73	\$192.68	\$166.24	\$332.47	\$175.83
	Median	\$150	\$170	\$145	\$83	\$83	\$170	\$166	\$150	\$175	\$166	\$332	\$166
OTHER	Mean	\$154.11	\$294.24	\$16.62	.	.	\$41.56	\$77.33	\$158.85	\$141.78	\$66.49	.	\$135.08
	Median	\$75	\$83	\$17	.	.	\$42	\$50	\$66	\$83	\$66	.	\$75
TOTAL	Mean	\$1,006.30	\$1,649.67	\$995.66	\$193.13	\$1,157.33	\$2,070.20	\$1,104.04	\$837.62	\$1,516.86	\$2,649.59	\$1,840.35	\$1,202.28
	Median	\$665	\$1,247	\$640	\$0	\$831	\$997	\$831	\$623	\$831	\$2,286	\$1,662	\$748

# ON-ISLAND EXPENDITURES - TRACKING



YTD = \$424.74



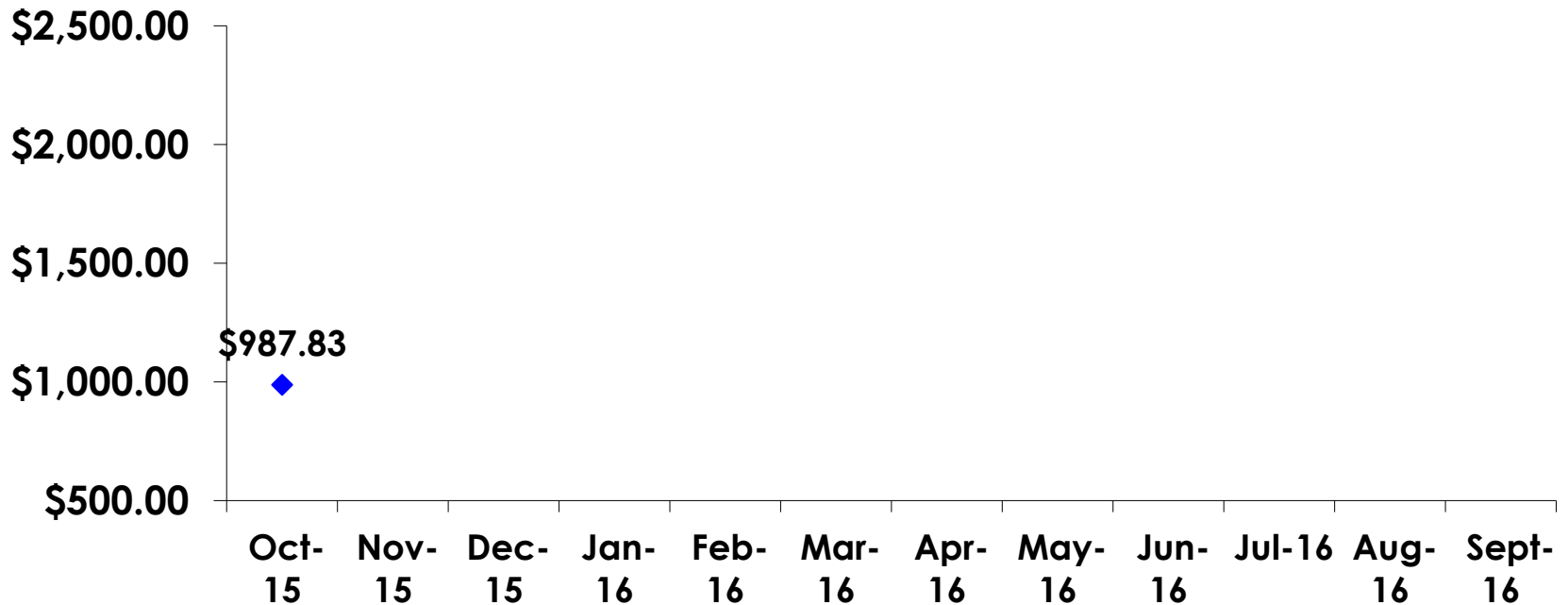
# ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$424.74	\$493.35	\$434.65	\$411.06	\$419.57	\$518.67	\$481.99	\$404.46	\$474.54	\$390.89	\$508.43	\$471.50
	Median	\$333	\$303	\$300	\$330	\$270	\$250	\$363	\$343	\$300	\$233	\$500	\$390
	Minimum	\$0	\$0	\$0	\$144	\$65	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$4,000	\$4,000	\$3,000	\$900	\$1,500	\$4,000	\$4,000	\$3,000	\$4,000	\$1,600	\$1,260	\$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	\$30.03	\$54.16	\$61.36	\$6.47	\$58.57	\$11.74	\$23.28	\$22.48	\$49.88	\$112.95	\$51.74	\$40.92
F&B FF/STORE	Mean	\$37.01	\$57.52	\$57.85	\$16.12	\$55.19	\$29.96	\$35.19	\$34.82	\$44.02	\$99.09	\$73.91	\$52.86
F&B RESTRNT	Mean	\$101.89	\$171.40	\$68.64	\$54.41	\$35.71	\$307.39	\$138.55	\$64.29	\$259.48	\$166.59	\$106.96	\$104.87
OPT TOUR	Mean	\$50.66	\$53.20	\$49.48	\$58.24	\$73.57	\$51.39	\$87.67	\$50.43	\$47.03	\$66.45	\$67.30	\$56.02
GIFT- SELF	Mean	\$156.70	\$290.05	\$271.76	\$89.53	\$224.76	\$198.70	\$190.37	\$131.74	\$234.20	\$346.91	\$160.22	\$205.85
GIFT- OTHER	Mean	\$98.48	\$117.31	\$81.30	\$80.88	\$80.24	\$65.04	\$118.37	\$83.57	\$141.45	\$112.32	\$230.43	\$117.76
TRANS	Mean	\$16.62	\$21.00	\$16.06	\$6.94	\$37.14	\$17.83	\$16.55	\$13.61	\$21.58	\$31.23	\$33.26	\$26.01
OTHER	Mean	\$144.32	\$254.21	\$48.58	\$98.47	\$298.05	\$271.74	\$121.31	\$139.89	\$107.38	\$307.41	\$288.70	\$178.89
TOTAL	Mean	\$635.72	\$1,018.84	\$655.03	\$411.06	\$863.24	\$953.78	\$731.28	\$540.84	\$905.02	\$1,242.95	\$1,012.52	\$783.18

# TOTAL EXPENDITURES – TRACKING



YTD=\$987.83

# 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	\$987.83	\$1,152.91	\$1,064.00	\$565.07	\$942.23	\$1,256.50	\$1,123.57	\$962.32	\$1,063.08	\$1,005.78	\$1,404.22	\$1,011.30
	Median	\$916	\$1,024	\$879	\$480	\$956	\$1,081	\$1,001	\$902	\$952	\$915	\$1,381	\$956
	Minimum	\$0	\$0	\$0	\$144	\$144	\$0	\$0	\$0	\$0	\$50	\$0	\$0
	Maximum	\$4,623	\$4,623	\$4,162	\$1,636	\$1,636	\$4,623	\$4,623	\$4,162	\$4,623	\$2,047	\$3,009	\$3,646

# 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>Drivers of Overall Satisfaction, October 2015</b>	
Drivers:	<b>rank</b>
Quality & Cleanliness of beaches & parks	<b>4</b>
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	<b>5</b>
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	<b>1</b>
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	<b>3</b>
% of Overall Satisfaction Accounted For	<b>65.6%</b>
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 five significant factors in the October 2015 Period. By rank order they are:
  - **Quality of landscape in Tumon,**
  - **Variety of shopping,**
  - **Quality/cleanliness of transportation vehicles,**
  - **Quality & cleanliness of beaches & parks, and**
  - **Variety of day time tours.**
- With all five factors the overall  $r^2$  is .656 meaning that **65.6% of overall satisfaction is accounted for by these factors.**



<b>Drivers of Per Person On Island Expenditures, Oct 2015</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	<b>3</b>
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	<b>1</b>
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	<b>2</b>
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>4.8%</b>
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 three significant factors in the October 2015 Period. By rank order they are:
  - **Quality of hotel accommodations,**
  - **Quality/cleanliness of parks, and**
  - **Quality of day time tours.**
- With all three factors the overall  $r^2$  is .048 meaning that **4.8% of per person on island expenditure is accounted for by these factors.**