



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2014 Market Segmentation

FEBRUARY 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.

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

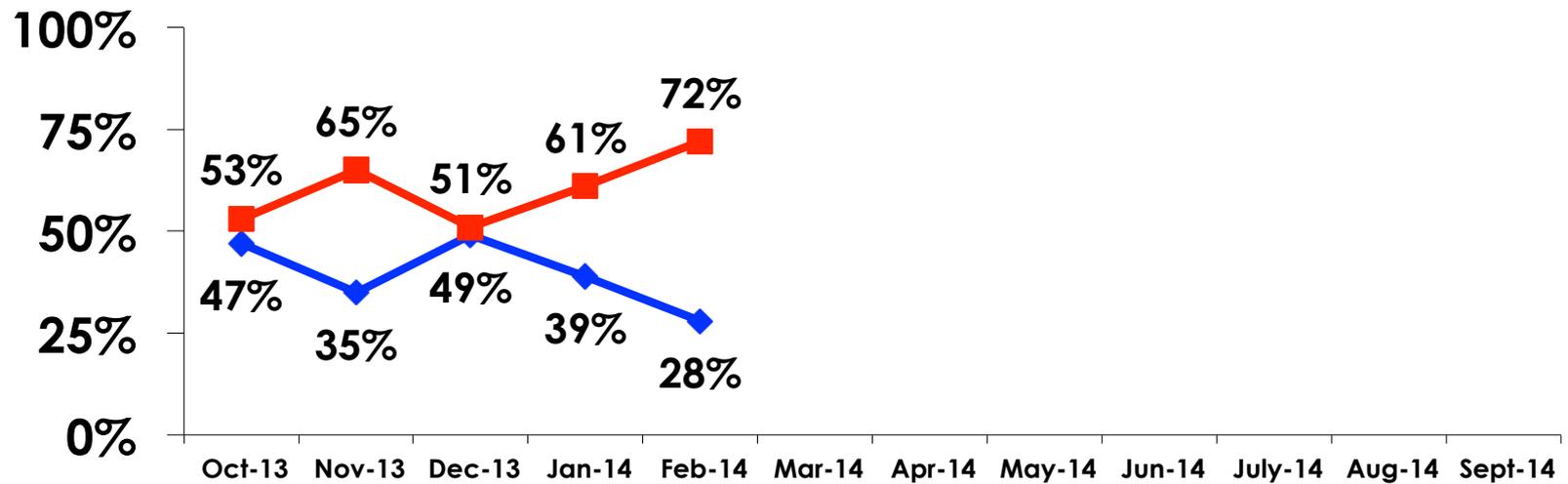
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

Highlighted Segments

	Oct 13	Nov 13	Dec 13	Jan 14	Feb 14	Mar 14	Apr 14	May 14	Jun 14	July 14	Aug 14	Sept 14
Families	39%	30%	45%	36%	25%							
Office Lady	13%	12%	10%	15%	6%							
Group	6%	5%	4%	3%	5%							
Silver	2%	2%	4%	3%	1%							
Wedding	8%	6%	4%	5%	3%							
Sport	35%	40%	42%	35%	41%							
18-35	64%	71%	61%	67%	78%							
36-55	29%	24%	32%	27%	19%							
Child	15%	9%	22%	14%	11%							
Honeymoon	4%	3%	5%	2%	3%							
Repeat	48%	43%	50%	43%	36%							
TOTAL	351	350	350	350	351							

SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status Tracking

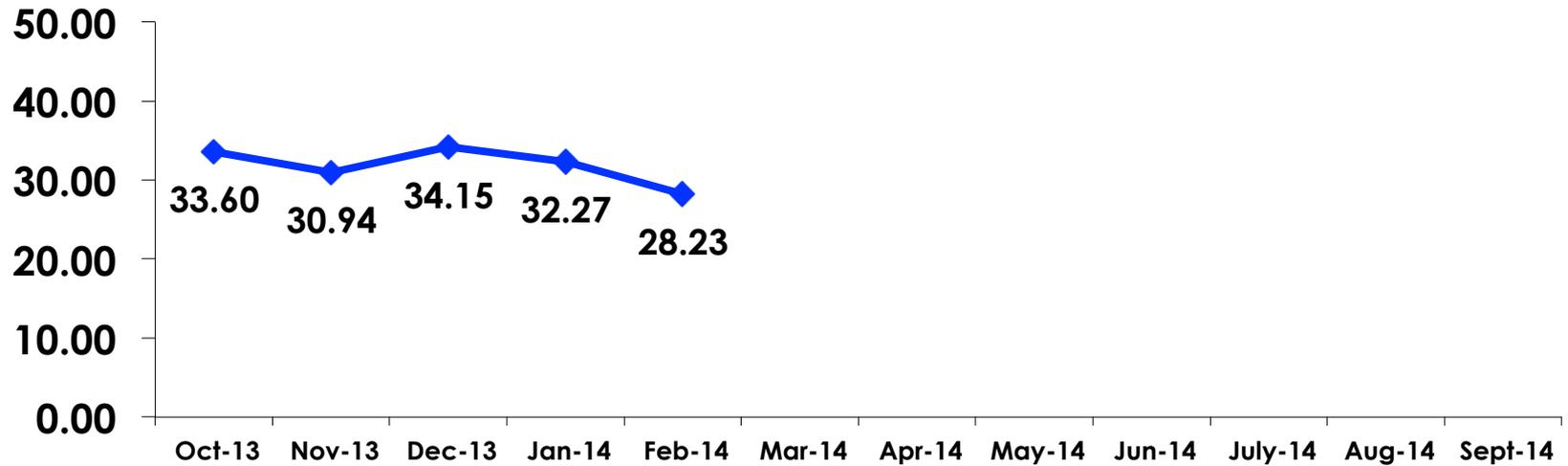


◆ Married ■ Single

Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	28%	87%	14%	11%	100%	45%	24%	11%	89%	98%	82%	43%
	Single	72%	13%	86%	89%		55%	76%	89%	11%	3%	18%	57%
	Total Count	351	89	22	18	4	11	145	273	65	40	11	127

Average Age Tracking



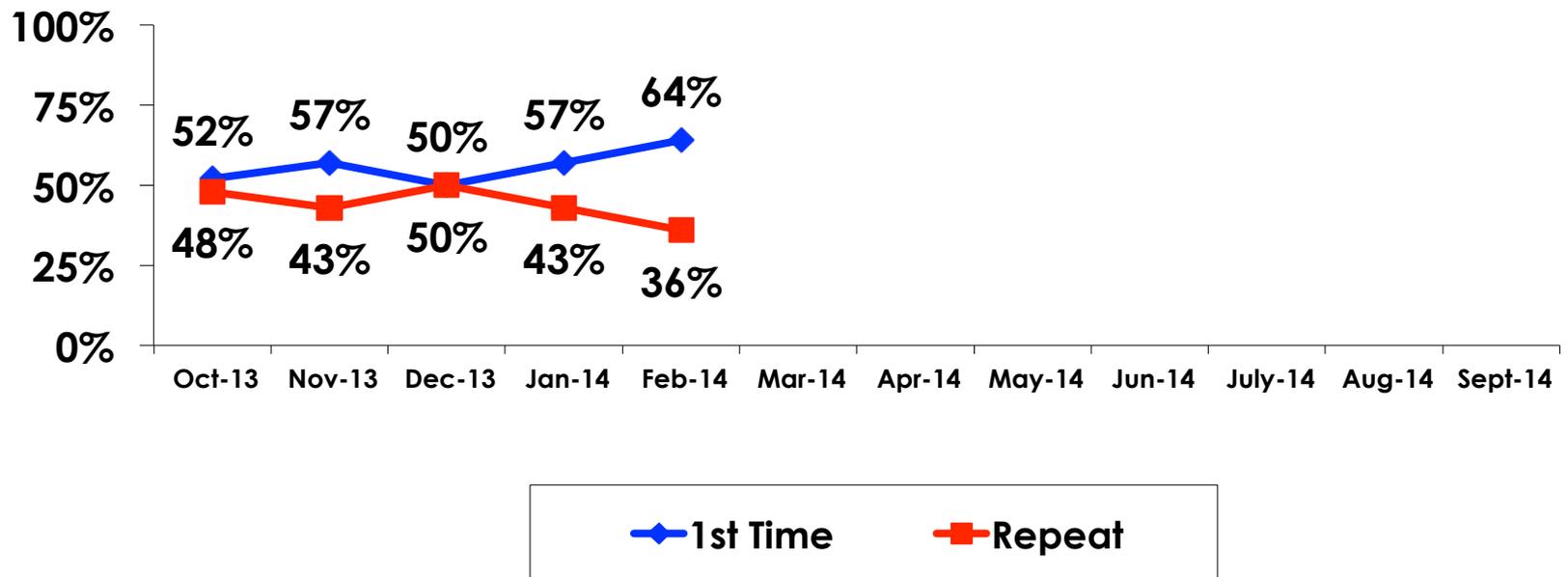
Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	56%	13%	38%	78%		18%	64%	70%			27%	33%
	25-34	23%	25%	52%	11%		55%	20%	29%		20%	55%	29%
	35-49	16%	43%	10%	6%		27%	12%	1%	80%	70%	18%	30%
	50+	6%	20%		6%	100%		4%		20%	10%		9%
	Total Count	344	87	21	18	4	11	141	273	65	40	11	125
QF	Mean	28.23	38.89	26.57	25.28	67.50	30.45	27.05	23.72	43.85	40.58	29.36	32.42
	Median	24	40	26	22	65	30	22	22	43	41	29	30

Income Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
	-	-	-	-	-	-	-	-	-	-	-	-
Q26 <Y2.0 million	8%	3%		21%		11%	9%	11%	2%	3%		3%
Y2.0M-Y3.0M	12%	5%	35%	7%		22%	14%	14%	5%		9%	12%
Y3.0M-Y4.0M	12%	7%	35%	7%			6%	15%			27%	7%
Y4.0M-Y5.0M	14%	16%	6%		25%	11%	18%	15%	12%	14%	36%	11%
Y5.0M-Y7.0M	19%	20%		21%	50%	11%	18%	18%	23%	20%	18%	24%
Y7.0M-Y10.0M	12%	28%	12%	7%	25%	22%	13%	8%	26%	37%		16%
Y10.0M+	16%	21%	12%	7%		22%	13%	11%	32%	26%		22%
No Income	7%			29%			9%	9%			9%	6%
Total Count	283	75	17	14	4	9	116	218	57	35	11	104

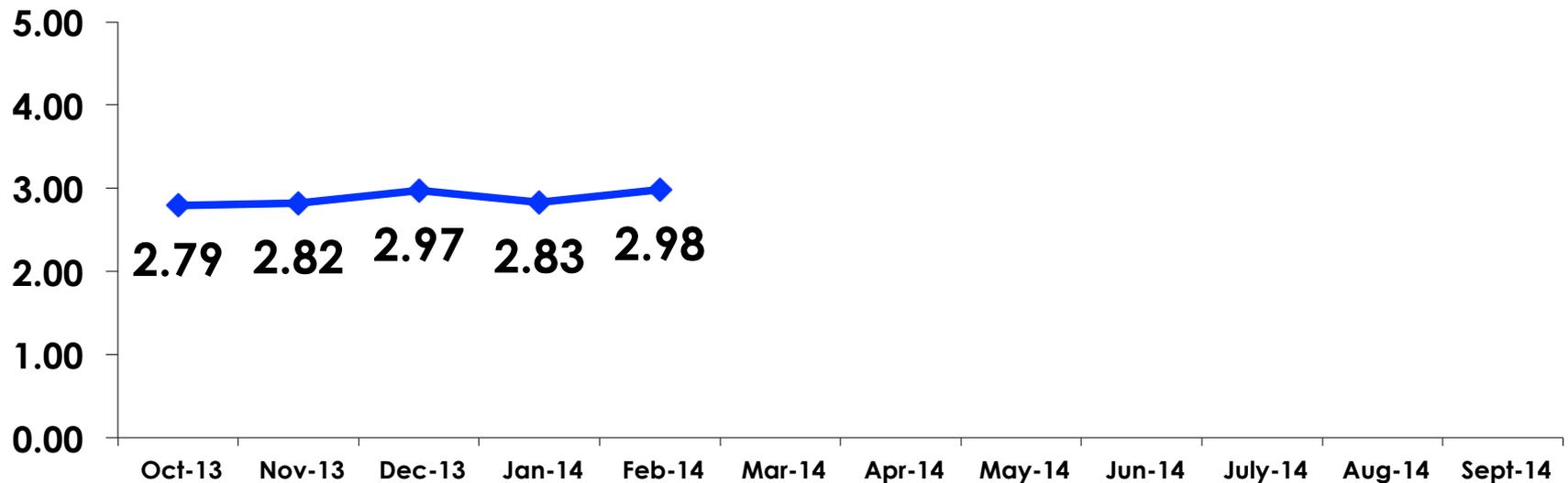
Prior Trips To Guam Tracking



Prior Trips To Guam Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	64%	53%	55%	72%	25%	55%	70%	71%	35%	33%	91%	
	No	36%	47%	45%	28%	75%	45%	30%	29%	65%	68%	9%	100%
	Total Count	351	89	22	18	4	11	145	273	65	40	11	127

Average Length of Stay Tracking



Average Length of Stay Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q8	Mean	2.98	3.38	2.64	2.67	4.00	3.18	3.07	2.87	3.38	3.70	3.00	3.07
	Median	3	3	3	2	4	3	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	64%	57%	71%		25%	55%	64%	66%	60%	60%	55%	57%	
	Full package tour	21%	27%	29%			18%	23%	22%	18%	20%	45%	21%	
	Individually arranged travel (FIT)	8%	15%			50%	27%	9%	4%	17%	20%		15%	
	Group tour	5%	1%		100%	25%		4%	6%	2%			4%	
	Company paid travel	2%							2%	3%			2%	
	Total	Count	349	89	21	18	4	11	145	271	65	40	11	126

Travel Motivation Segmentation

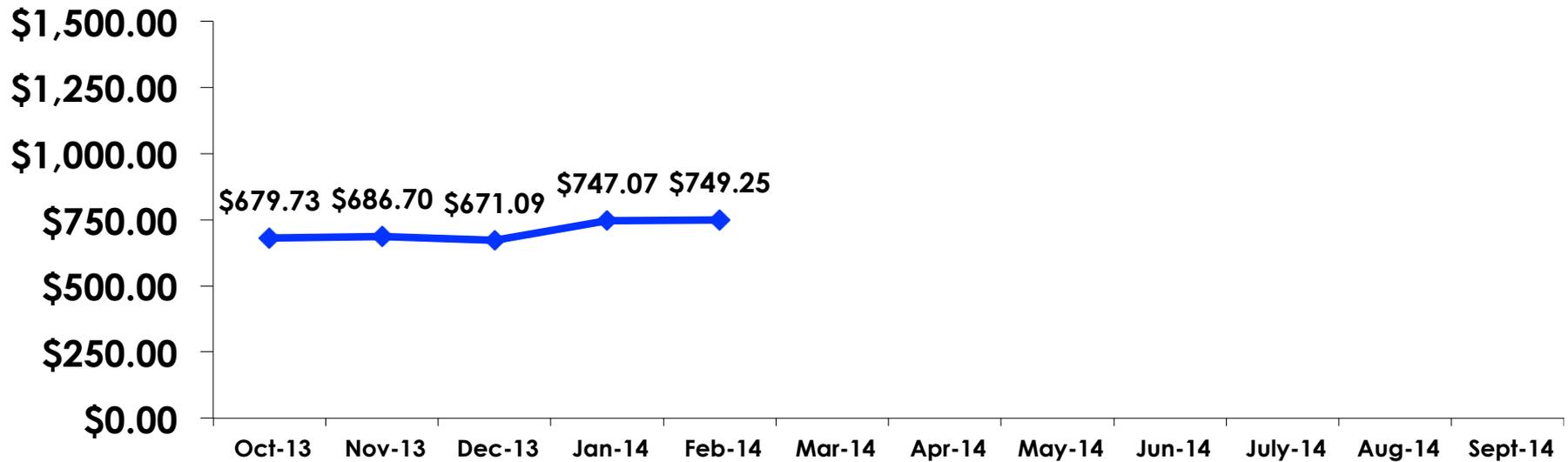
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	27%	40%	18%	22%	50%	36%	24%	20%	52%	63%	9%	75%
	Price	28%	31%	14%	11%		9%	32%	29%	28%	30%	18%	20%
	Visit friends/ Relatives	2%	1%					4%	3%	2%	3%		2%
	Recomm- friend/family/trvl agnt	25%	10%	41%	6%	25%		28%	29%	11%	8%	9%	14%
	Scuba	6%	7%	5%				11%	6%	6%		27%	6%
	Water sports	21%	16%	32%	17%		9%	31%	23%	18%	18%	9%	20%
	Short travel time	46%	58%	64%	22%	25%	27%	48%	42%	58%	73%	27%	54%
	Golf	2%	4%		6%	75%		1%		5%	3%		5%
	Relax	30%	40%	45%	17%	25%	9%	23%	28%	38%	55%	27%	39%
	Company/ Business Trip	6%			50%	25%		5%	5%	8%			9%
	Company Sponsored	1%	1%					1%	1%	2%	3%		1%
	Safe	22%	30%	18%	11%			25%	19%	35%	45%	18%	25%
	Natural beauty	62%	66%	77%	39%	25%	27%	63%	63%	62%	70%	45%	55%
	Shopping	35%	31%	59%	17%		27%	31%	38%	25%	28%	27%	32%
	Career Cert/ Testing	1%						1%	1%				1%
	Married/ Attn wedding	3%	9%				100%	3%	3%	5%	10%		4%
	Honeymoon	3%	11%					4%	3%	3%		100%	1%
	Pleasure	49%	49%	55%	22%	25%	18%	47%	51%	45%	50%	27%	43%
	Organized sports	2%						4%	2%				
	Other	5%	2%		6%			5%	5%	3%			5%
	Total Count	351	89	22	18	4	11	145	273	65	40	11	127

Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	83%	90%	64%	67%	75%	64%	81%	82%	88%	95%	73%	81%	
	Travel Guidebook- Bookstore	51%	48%	77%	28%	25%	36%	50%	51%	54%	53%	73%	50%	
	Travel Agent Brochure	49%	44%	50%	28%	50%	27%	51%	51%	43%	33%	64%	42%	
	Magazine (Consumer)	39%	42%	41%	17%		36%	42%	39%	40%	35%	36%	34%	
	Friend/ Relative	37%	21%	41%	39%	25%	36%	37%	42%	17%	20%	9%	27%	
	Prior Trip	34%	47%	36%	28%	75%	45%	28%	26%	65%	68%	9%	94%	
	TV	15%	11%	23%	6%			13%	15%	12%	5%	36%	13%	
	Consumer Trvl Show	4%	2%	5%				7%	5%	2%		9%	4%	
	Co-Worker/ Company Trvl Dept	2%	3%	9%				2%	3%		3%	9%	1%	
	Other	1%					9%		1%				2%	
	Newspaper	1%	1%							3%			1%	
	Travel Trade Show	0%	1%							2%		9%		
	GVB Office	0%	1%							2%			1%	
	Total	Count	350	89	22	18	4	11	145	272	65	40	11	127

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

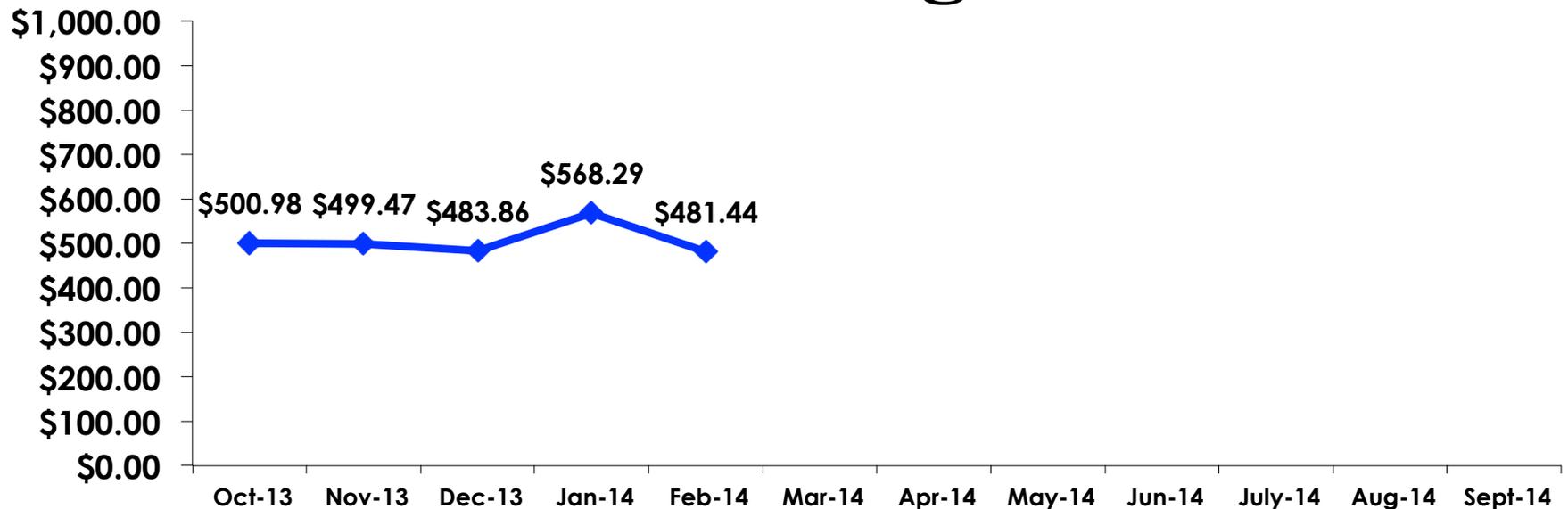


YTD=\$706.78

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	\$749.25	\$919.48	\$861.93	\$412.23	\$1,047.08	\$738.68	\$727.32	\$725.40	\$856.96	\$909.40	\$1,073.24	\$758.55
	Median	\$710	\$980	\$882	\$441	\$1,102	\$980	\$686	\$686	\$857	\$980	\$1,127	\$686
	Minimum	\$0	\$0	\$0	\$0	\$710	\$0	\$0	\$0	\$0	\$0	\$294	\$0
	Maximum	\$2,694	\$2,694	\$1,372	\$1,274	\$1,274	\$1,372	\$1,763	\$1,763	\$2,694	\$1,633	\$1,763	\$2,694

On-Island Expenditures Tracking



YTD = \$506.79

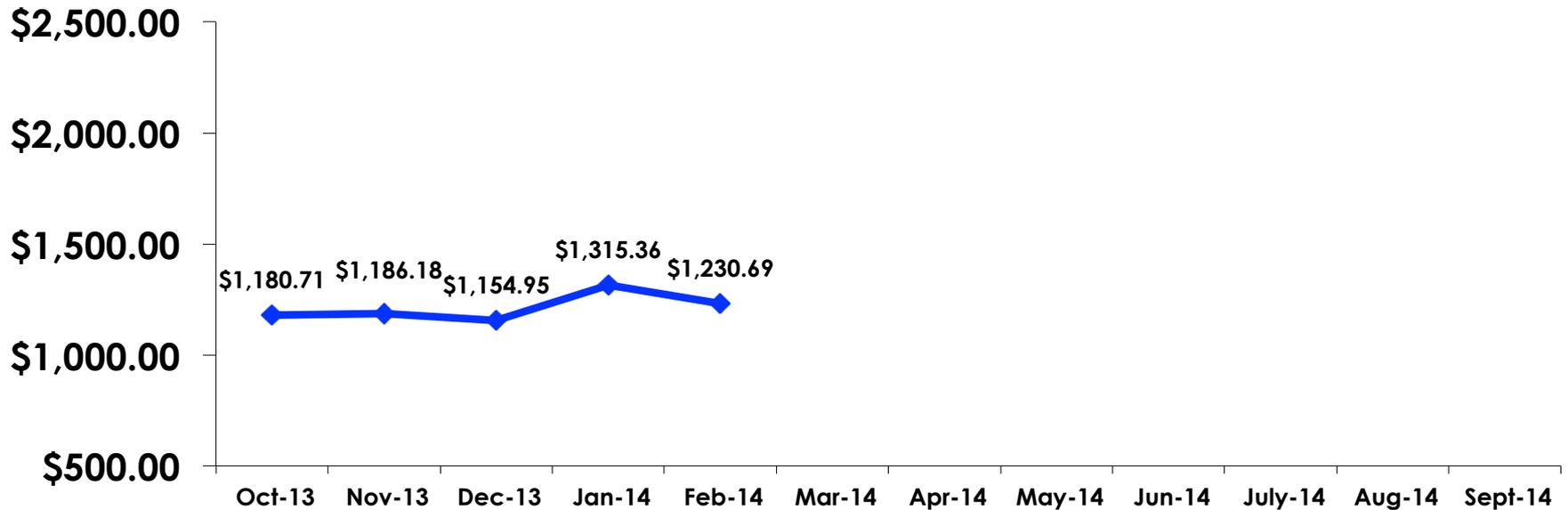
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$481.44	\$486.12	\$628.39	\$251.67	\$560.00	\$353.19	\$418.98	\$450.62	\$613.22	\$361.22	\$452.73	\$466.23
	Median	\$380	\$375	\$475	\$250	\$545	\$350	\$400	\$350	\$400	\$251	\$350	\$350
	Minimum	\$0	\$0	\$0	\$0	\$400	\$0	\$0	\$0	\$0	\$40	\$0	\$0
	Maximum	\$3,600	\$2,500	\$2,000	\$700	\$750	\$658	\$2,500	\$3,600	\$2,700	\$2,000	\$1,750	\$2,700

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	\$38.78	\$93.65	\$124.86	\$24.33	\$150.00	\$41.82	\$53.12	\$21.90	\$107.02	\$147.50	\$35.00	\$54.46
	Median	\$0	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$0	\$0	\$15	\$0
F&B FF/STORE	Mean	\$22.91	\$26.37	\$7.55	\$19.33	\$0.00	\$21.82	\$28.20	\$20.32	\$36.78	\$32.55	\$17.27	\$25.24
	Median	\$0	\$0	\$0	\$1	\$0	\$0	\$15	\$0	\$20	\$0	\$0	\$0
F&B RESTRNT	Mean	\$66.40	\$132.18	\$17.91	\$25.39	\$87.50	\$195.45	\$64.66	\$50.64	\$136.06	\$166.00	\$142.18	\$92.28
	Median	\$0	\$20	\$0	\$5	\$75	\$150	\$15	\$0	\$80	\$0	\$100	\$0
OPT TOUR	Mean	\$84.05	\$134.56	\$47.18	\$24.72	\$500.00	\$28.18	\$102.42	\$60.34	\$160.45	\$130.65	\$136.36	\$98.19
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$20	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$129.11	\$181.91	\$54.32	\$55.56	\$62.50	\$323.64	\$95.80	\$118.31	\$187.23	\$205.75	\$112.73	\$148.52
	Median	\$0	\$0	\$0	\$23	\$0	\$10	\$10	\$0	\$0	\$0	\$50	\$0
GIFT- OTHER	Mean	\$120.65	\$230.79	\$100.68	\$72.11	\$0.00	\$175.45	\$99.75	\$85.36	\$287.54	\$325.75	\$134.55	\$161.10
	Median	\$30	\$80	\$0	\$30	\$0	\$100	\$50	\$30	\$100	\$100	\$100	\$0
TRANS	Mean	\$15.97	\$33.99	\$1.36	\$3.56	\$0.00	\$84.36	\$25.57	\$10.68	\$39.72	\$56.95	\$15.45	\$27.91
	Median	\$0	\$0	\$0	\$0	\$0	\$23	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$235.80	\$460.94	\$289.68	\$50.28	\$1,070.00	\$117.73	\$205.46	\$168.00	\$472.91	\$252.85	\$152.82	\$214.17
	Median	\$0	\$20	\$135	\$0	\$640	\$0	\$0	\$0	\$20	\$0	\$0	\$6
TOTAL	Mean	\$713.53	\$1,294.45	\$643.55	\$273.89	\$1,870.00	\$988.45	\$674.12	\$534.99	\$1,429.25	\$1,318.00	\$746.36	\$822.06
	Median	\$440	\$900	\$500	\$250	\$1,840	\$600	\$410	\$400	\$1,000	\$1,000	\$700	\$500

Total Expenditures Tracking



YTD=\$1,213.57

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	\$1,230.69	\$1,405.60	\$1,490.32	\$663.89	\$1,607.08	\$1,091.87	\$1,146.30	\$1,176.03	\$1,470.18	\$1,270.63	\$1,525.97	\$1,224.78
	Median	\$1,130	\$1,321	\$1,408	\$544	\$1,577	\$1,080	\$1,086	\$1,088	\$1,284	\$1,218	\$1,576	\$1,092
	Minimum	\$0	\$0	\$400	\$0	\$1,300	\$0	\$0	\$0	\$0	\$200	\$294	\$0
	Maximum	\$4,606	\$4,194	\$2,500	\$1,680	\$1,975	\$1,972	\$3,970	\$4,606	\$4,194	\$2,735	\$2,663	\$4,194

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 ($p \leq .05$) 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 2013, Jan, Feb, 2014, and Overall Oct-2013 - Feb 2014						
	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Combined Oct-2013 - Feb 2014
Drivers:	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks			3	4	2	4
Ease of getting around						
Safety walking around at night						
Quality of daytime tours	2			3		
Variety of daytime tours						6
Quality of nighttime tours						
Variety of nighttime tours						10
Quality of shopping	4		5			3
Variety of shopping				1		
Price of things on Guam				5	4	
Quality of hotel accommodations			2		3	5
Quality/cleanliness of air, sky	3	4			5	9
Quality/cleanliness of parks						
Quality of landscape in Tumon	1	2				7
Quality of landscape in Guam			1	2	1	1
Quality of ground handler		1				8
Quality/cleanliness of transportation vehicles		3	4			2
% of Per Person On Island Expenditures Accounted For	45.2%	41.7%	47.4%	42.5%	52.4%	68.5%
NOTE: Only significant drivers are included.						

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by five significant factors in the February 2014 Period. By rank order they are:
 - **Quality of landscape on Guam,**
 - **Quality & cleanliness of beaches & parks,**
 - **Quality of hotel accommodations,**
 - **Price of things on Guam, and**
 - **Quality, cleanliness of air and sky.**
- With all four factors the overall r^2 is .524 meaning that **52.4% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2013, Jan, Feb 2014 and Overall Oct-2013-Feb 2014						
	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Combined Oct-2013-Feb 2014
Drivers:	rank	rank	rank	rank	rank	rank
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						2
Quality of shopping						1
Variety of shopping				1		
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%	0.0%	2.9%	0.0%	1.3%

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 February 2014 Period.