



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2014 Market Segmentation

JANUARY 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.

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

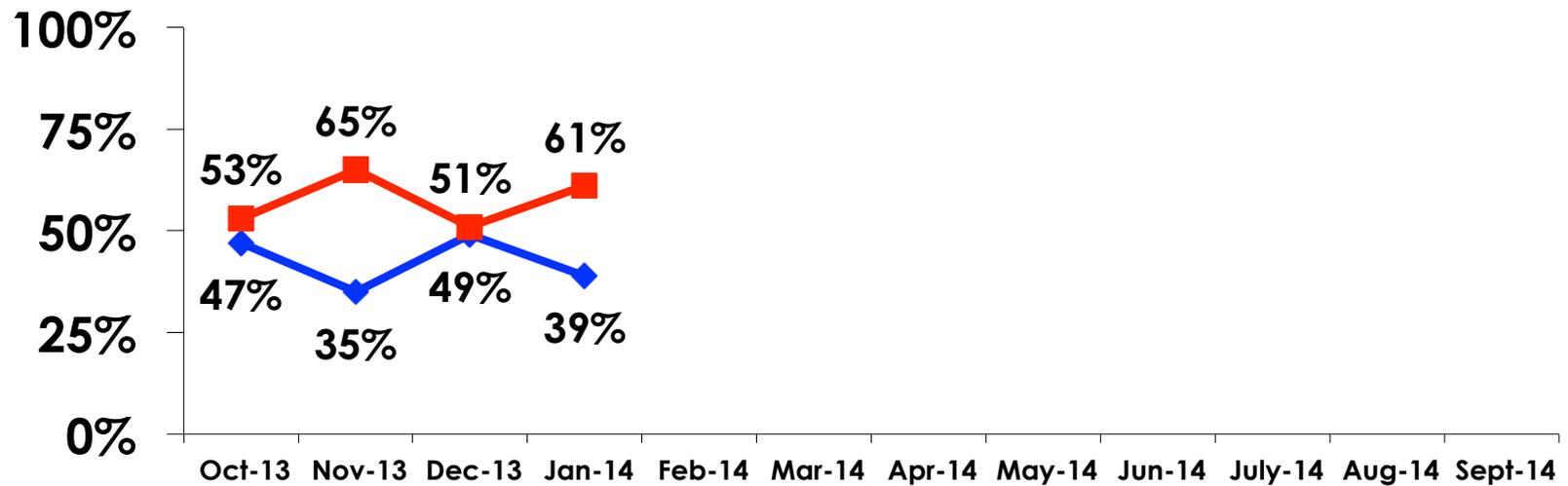
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

Highlighted Segments

	Oct 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%								
Office Lady	13%	12%	10%	15%								
Group	6%	5%	4%	3%								
Silver	2%	2%	4%	3%								
Wedding	8%	6%	4%	5%								
Sport	35%	40%	42%	35%								
18-35	64%	71%	61%	67%								
36-55	29%	24%	32%	27%								
Child	15%	9%	22%	14%								
Honeymoon	4%	3%	5%	2%								
Repeat	48%	43%	50%	43%								
TOTAL	351	350	350	350								

SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status Tracking

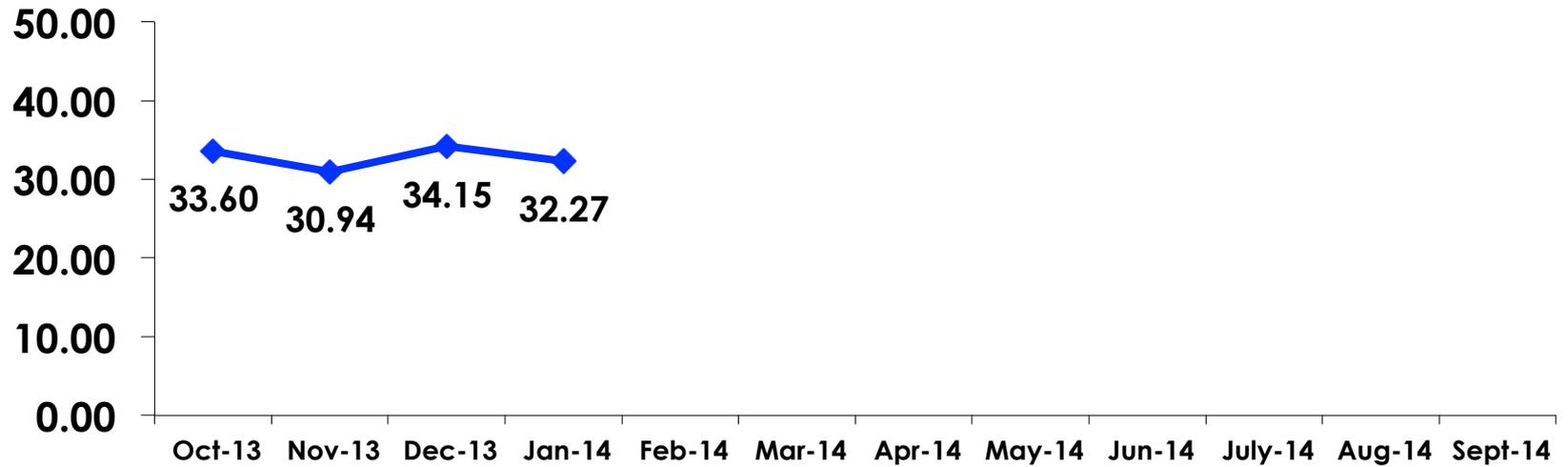


◆ Married ■ Single

Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	39%	84%	21%	8%	91%	47%	35%	17%	83%	92%	100%	52%
	Single	61%	16%	79%	92%	9%	53%	65%	83%	17%	8%		48%
	Total Count	347	124	52	12	11	15	120	233	95	49	8	149

Average Age Tracking



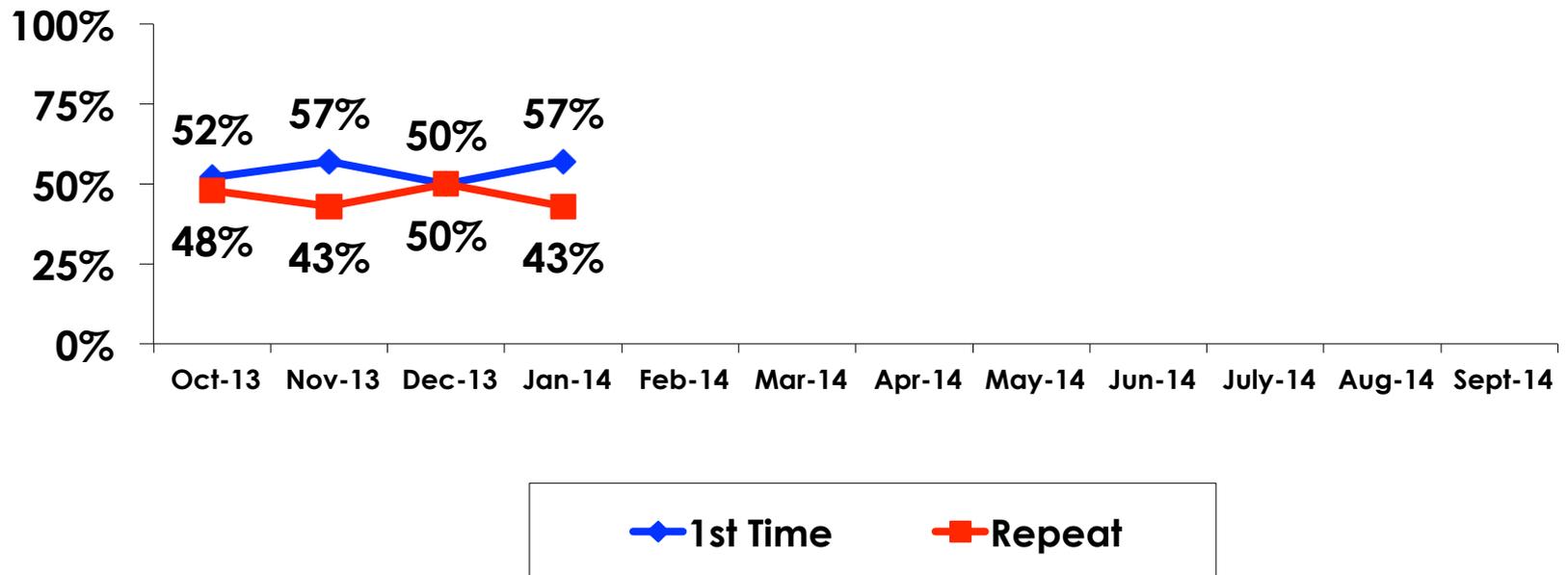
Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	32%	7%	25%	92%		6%	34%	48%		2%	25%	15%
	25-34	32%	27%	50%	8%		63%	32%	47%		14%	25%	37%
	35-49	26%	47%	19%			31%	25%	5%	83%	73%	25%	34%
	50+	10%	19%	6%		100%		9%		17%	10%	25%	15%
	Total Count	348	124	52	12	11	16	121	235	95	49	8	150
QF	Mean	32.27	39.23	30.10	22.92	64.18	30.81	31.74	25.65	43.12	40.06	36.13	35.99
	Median	28	39	28	23	64	30	27	25	42	40	32	34

Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	10%	3%	6%	20%	13%		8%	12%	3%	2%	14%	7%
	Y2.0M-Y3.0M	12%	4%	27%	20%		7%	9%	16%	5%			12%
	Y3.0M-Y4.0M	10%	5%	18%	20%	13%	13%	13%	13%	5%	5%	14%	9%
	Y4.0M-Y5.0M	17%	18%	12%	20%	13%	20%	22%	17%	17%	9%	14%	14%
	Y5.0M-Y7.0M	20%	33%	20%		13%	20%	19%	17%	28%	39%	43%	22%
	Y7.0M-Y10.0M	14%	18%	10%		25%	13%	14%	10%	21%	25%	14%	13%
	Y10.0M+	13%	18%	6%		25%	27%	10%	9%	21%	18%		20%
	No Income	4%	2%		20%			4%	5%	1%	2%		3%
	Total Count	305	118	49	10	8	15	107	201	87	44	7	138

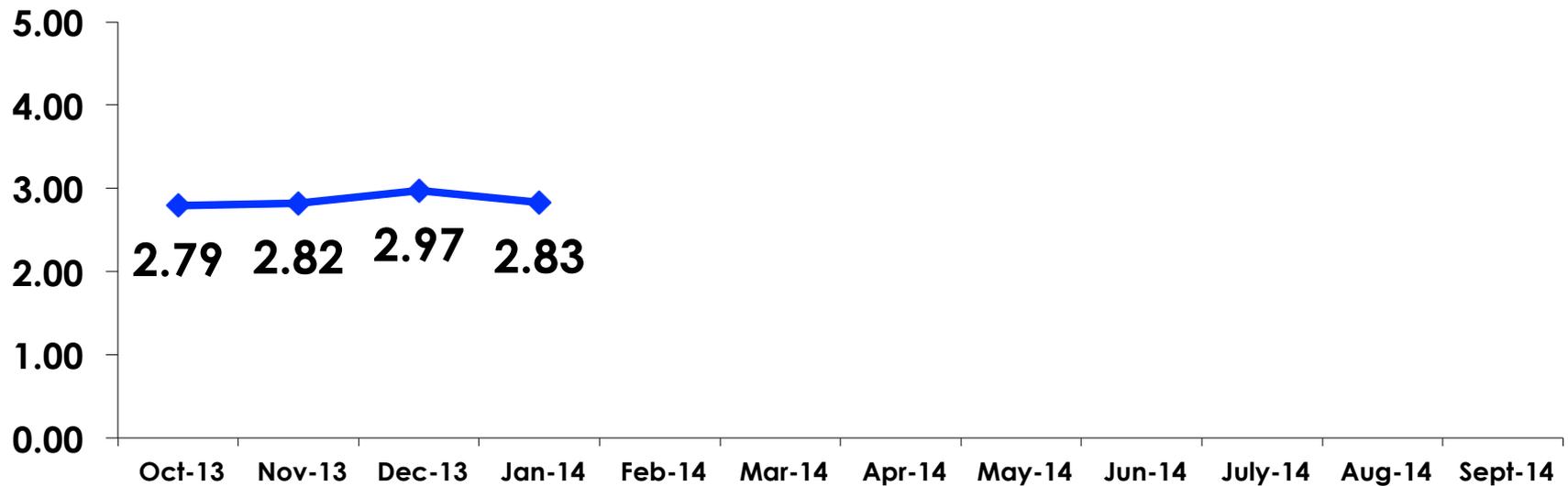
Prior Trips to Guam Tracking



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%	47%	53%	92%	45%	38%	64%	64%	44%	41%	63%	
	No	43%	53%	47%	8%	55%	63%	36%	36%	56%	59%	38%	100%
	Total Count	348	124	51	12	11	16	121	234	94	49	8	151

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	2.83	3.22	2.67	2.58	4.00	2.75	2.95	2.72	2.96	3.45	3.00	2.92
	Median	3	3	3	3	3	2	3	3	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%	51%	54%		40%	69%	66%	68%	52%	53%	63%	64%
	Full package tour	23%	28%	27%		30%	19%	20%	20%	28%	18%	38%	19%
	Individually arranged travel (FIT)	9%	20%	10%		30%	13%	5%	5%	15%	29%		13%
	Group tour	3%		2%	100%			3%	5%				1%
	Company paid travel	3%	1%	6%				5%	2%	4%			3%
	Other	1%		2%				1%		1%			1%
	Total Count	349	125	52	12	10	16	122	235	95	49	8	151

Travel Motivation Segmentation

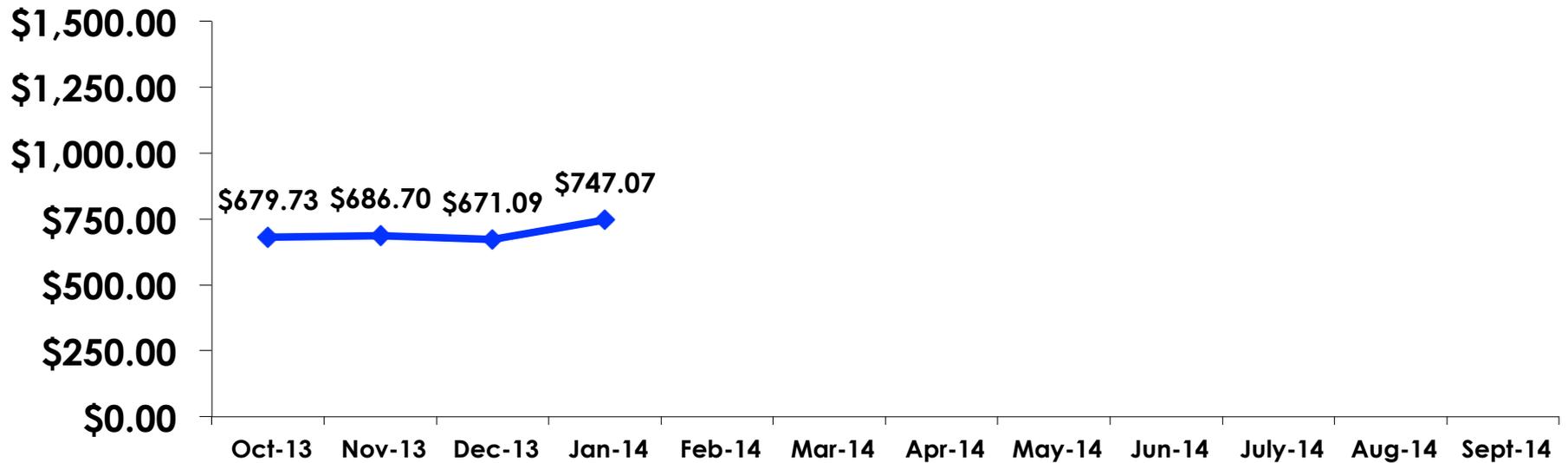
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	35%	47%	39%	8%	36%	50%	26%	28%	49%	55%	13%	81%	
	Price	20%	18%	18%		9%		24%	20%	21%	20%	13%	18%	
	Visit friends/ Relatives	2%	2%	8%			6%	2%	2%	3%	2%		1%	
	Recomm- friend/family/trvl agnt	20%	13%	20%	8%	18%	6%	20%	23%	14%	10%		5%	
	Scuba	9%	3%	4%	17%	18%		19%	10%	5%	6%		8%	
	Water sports	27%	16%	24%	25%	9%	6%	47%	31%	20%	20%	25%	23%	
	Short travel time	48%	65%	45%	8%	55%	19%	49%	45%	55%	71%	100%	51%	
	Golf	4%	6%			27%		7%	2%	4%	2%		6%	
	Relax	30%	38%	33%	8%	27%	19%	34%	28%	35%	43%	25%	34%	
	Company/ Business Trip	10%	2%	12%	67%			10%	10%	13%	4%		9%	
	Company Sponsored	0%		2%					0%				1%	
	Safe	23%	33%	16%	25%	18%	13%	21%	21%	28%	39%	25%	26%	
	Natural beauty	58%	64%	59%	42%	27%	13%	64%	58%	62%	80%	50%	58%	
	Shopping	36%	37%	51%	33%	18%	6%	35%	37%	34%	31%	38%	38%	
	Married/ Attn wedding	5%	6%	2%			100%		6%	3%	2%		7%	
	Honeymoon	2%	5%	2%		9%		2%	2%	3%		100%	2%	
	Pleasure	51%	50%	51%	17%	45%	13%	58%	54%	44%	59%	63%	49%	
	Organized sports	2%	2%					2%	3%	1%	2%		3%	
	Other	5%	5%	4%				4%	6%	5%	4%		5%	
	Total	Count	348	125	51	12	11	16	121	234	94	49	8	151

Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	75%	76%	75%	83%	73%	81%	79%	76%	71%	82%	75%	75%	
	Travel Guidebook- Bookstore	55%	57%	65%	33%	45%	69%	56%	57%	51%	47%	50%	52%	
	Travel Agent Brochure	45%	43%	52%	50%	27%	50%	48%	47%	41%	43%	63%	40%	
	Prior Trip	41%	52%	44%	8%	55%	63%	32%	33%	56%	57%	38%	95%	
	Magazine (Consumer)	36%	40%	33%	17%	27%	38%	39%	36%	38%	43%	88%	27%	
	Friend/ Relative	34%	28%	31%	42%	18%	63%	32%	36%	33%	24%	13%	16%	
	TV	17%	20%	15%	8%	9%	13%	15%	18%	16%	16%	38%	15%	
	Consumer Trvl Show	3%	5%	4%		9%		6%	3%	3%	6%		3%	
	Co-Worker/ Company Trvl Dept	3%	1%	6%	8%			2%	4%	2%		13%	1%	
	GVB Office	1%	1%					1%	0%	1%	2%		1%	
	GVB Promo	1%	1%					1%	0%	1%		13%		
	Newspaper	1%				18%		1%					1%	
	Other	0%							0%					
	Total	Count	348	123	52	12	11	16	122	235	94	49	8	151

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

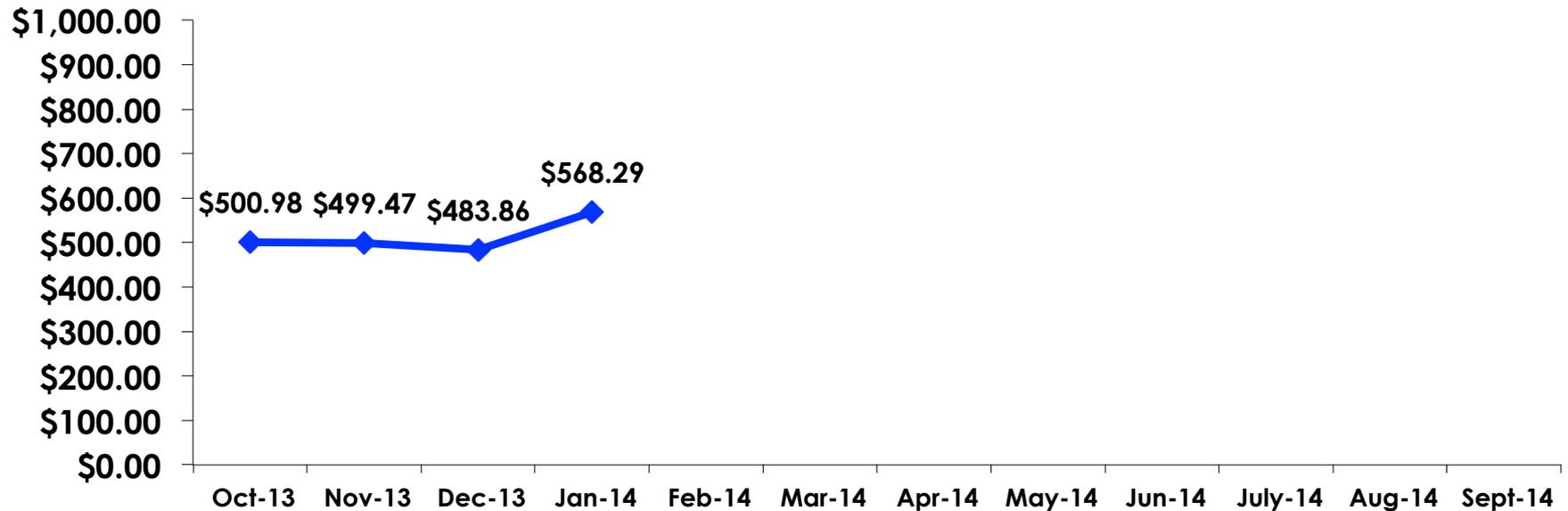


YTD=\$696.14

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	\$747.07	\$837.67	\$666.69	\$698.66	\$716.44	\$1,040.25	\$744.53	\$739.60	\$730.41	\$808.35	\$931.15	\$768.47
	Median	\$705	\$771	\$675	\$853	\$597	\$964	\$723	\$675	\$675	\$803	\$915	\$723
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$366	\$0
	Maximum	\$3,566	\$3,442	\$1,783	\$1,156	\$1,927	\$3,442	\$2,120	\$3,442	\$3,566	\$2,065	\$1,783	\$3,442

On-Island Expenditures Tracking



YTD = \$513.14

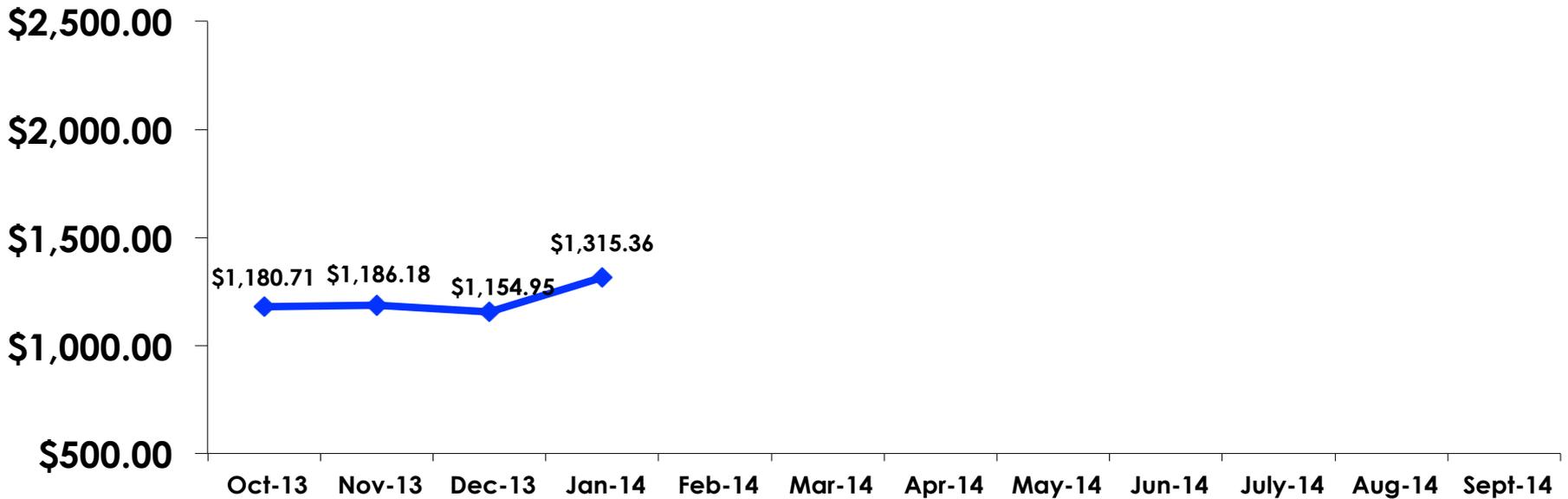
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$568.29	\$557.50	\$573.00	\$650.00	\$899.32	\$690.42	\$530.74	\$574.75	\$527.51	\$445.87	\$467.00	\$664.43
	Median	\$402	\$370	\$450	\$475	\$900	\$400	\$400	\$400	\$405	\$283	\$500	\$500
	Minimum	\$0	\$0	\$0	\$200	\$140	\$0	\$0	\$0	\$0	\$0	\$140	\$0
	Maximum	\$5,000	\$3,933	\$2,500	\$1,500	\$2,500	\$3,000	\$2,500	\$5,000	\$3,933	\$3,933	\$1,000	\$5,000

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	\$31.43	\$55.38	\$44.15	\$8.33	\$25.45	\$6.25	\$33.68	\$28.61	\$38.56	\$44.14	\$6.25	\$38.68
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$36.42	\$43.82	\$16.07	\$10.83	\$29.45	\$21.88	\$35.17	\$25.54	\$63.95	\$52.63	\$25.00	\$42.22
	Median	\$10	\$20	\$0	\$5	\$14	\$0	\$7	\$0	\$40	\$20	\$0	\$10
F&B RESTRNT	Mean	\$86.32	\$139.83	\$77.83	\$15.42	\$118.18	\$33.13	\$92.82	\$56.82	\$136.16	\$174.57	\$160.00	\$111.94
	Median	\$10	\$50	\$0	\$0	\$100	\$0	\$10	\$0	\$50	\$100	\$55	\$50
OPT TOUR	Mean	\$75.26	\$78.54	\$52.14	\$48.96	\$36.36	\$2.50	\$102.70	\$65.61	\$104.43	\$89.90	\$51.50	\$98.45
	Median	\$0	\$0	\$0	\$4	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$326.26	\$411.43	\$197.23	\$159.17	\$204.55	\$271.88	\$333.15	\$303.28	\$417.38	\$563.88	\$361.25	\$485.23
	Median	\$50	\$70	\$90	\$15	\$0	\$0	\$45	\$30	\$100	\$100	\$420	\$100
GIFT- OTHER	Mean	\$122.42	\$145.26	\$125.15	\$117.50	\$244.18	\$68.13	\$104.93	\$89.34	\$191.42	\$194.18	\$125.00	\$132.54
	Median	\$70	\$80	\$75	\$55	\$150	\$0	\$70	\$50	\$100	\$100	\$50	\$100
TRANS	Mean	\$13.50	\$25.44	\$5.94	\$4.17	\$36.36	\$14.25	\$12.33	\$6.92	\$27.37	\$41.49	\$0.00	\$19.81
	Median	\$0	\$0	\$0	\$0	\$16	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$190.41	\$336.32	\$122.42	\$306.46	\$825.00	\$412.00	\$202.11	\$184.91	\$148.59	\$223.94	\$125.00	\$181.19
	Median	\$0	\$0	\$0	\$168	\$0	\$95	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$836.37	\$1,238.67	\$645.98	\$670.83	\$1,519.55	\$830.00	\$782.86	\$691.50	\$1,131.66	\$1,385.76	\$854.00	\$1,003.52
	Median	\$546	\$800	\$560	\$500	\$1,600	\$500	\$500	\$500	\$800	\$900	\$850	\$700

Total Expenditures Tracking



YTD=\$1,209.28

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	\$1,315.36	\$1,395.17	\$1,239.69	\$1,348.66	\$1,615.76	\$1,730.66	\$1,275.27	\$1,314.35	\$1,257.92	\$1,254.22	\$1,398.15	\$1,432.90
	Median	\$1,217	\$1,271	\$1,164	\$1,294	\$1,497	\$1,369	\$1,179	\$1,178	\$1,194	\$1,156	\$1,453	\$1,323
	Minimum	\$0	\$0	\$0	\$875	\$423	\$0	\$0	\$0	\$0	\$0	\$506	\$0
	Maximum	\$6,442	\$6,442	\$3,560	\$2,656	\$3,415	\$6,442	\$3,542	\$6,442	\$4,833	\$4,833	\$2,205	\$6,442

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 2014, and Overall Oct-2013 - Jan 2014					
	Oct-13	Nov-13	Dec-13	Jan-14	Combin ed Oct-201 3 - Jan 2014
Drivers:	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks			3	4	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					8
Variety of nighttime tours					
Quality of shopping	4		5		3
Variety of shopping				1	
Price of things on Guam				5	
Quality of hotel accommodations			2		9
Quality/cleanliness of air, sky	3	4			
Quality/cleanliness of parks					
Quality of landscape in Tumon	1	2			7
Quality of landscape in Guam			1	2	1
Quality of ground handler		1			5
Quality/cleanliness of transportation vehicles		3	4		2
% of Per Person On Island Expenditures Accounted For	45.2%	41.7%	47.4%	42.5%	44.1%

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 January 2014 Period. By rank order they are:
 - **Variety of shopping,**
 - **Quality of landscape in Guam,**
 - **Quality of day time tours,**
 - **Cleanliness of beaches & parks, and**
 - **Price of things in Guam.**
- With all four factors the overall r^2 is .425 meaning that **42.5% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2013, Jan 2014 and Overall Oct-2013-Jan 2014					
	Oct-13	Nov-13	Dec-13	Jan-14	Combined Oct-2013-Jan 2014
Drivers:	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%	1.2%
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 one significant factor in the January 2014 Period. It is:
 - **Variety of shopping.**
- With this factor the overall r^2 is .029 meaning that **2.9% of per person on island expenditure is accounted for by this factor.**