



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2014 Market Segmentation

MAY 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.¹

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

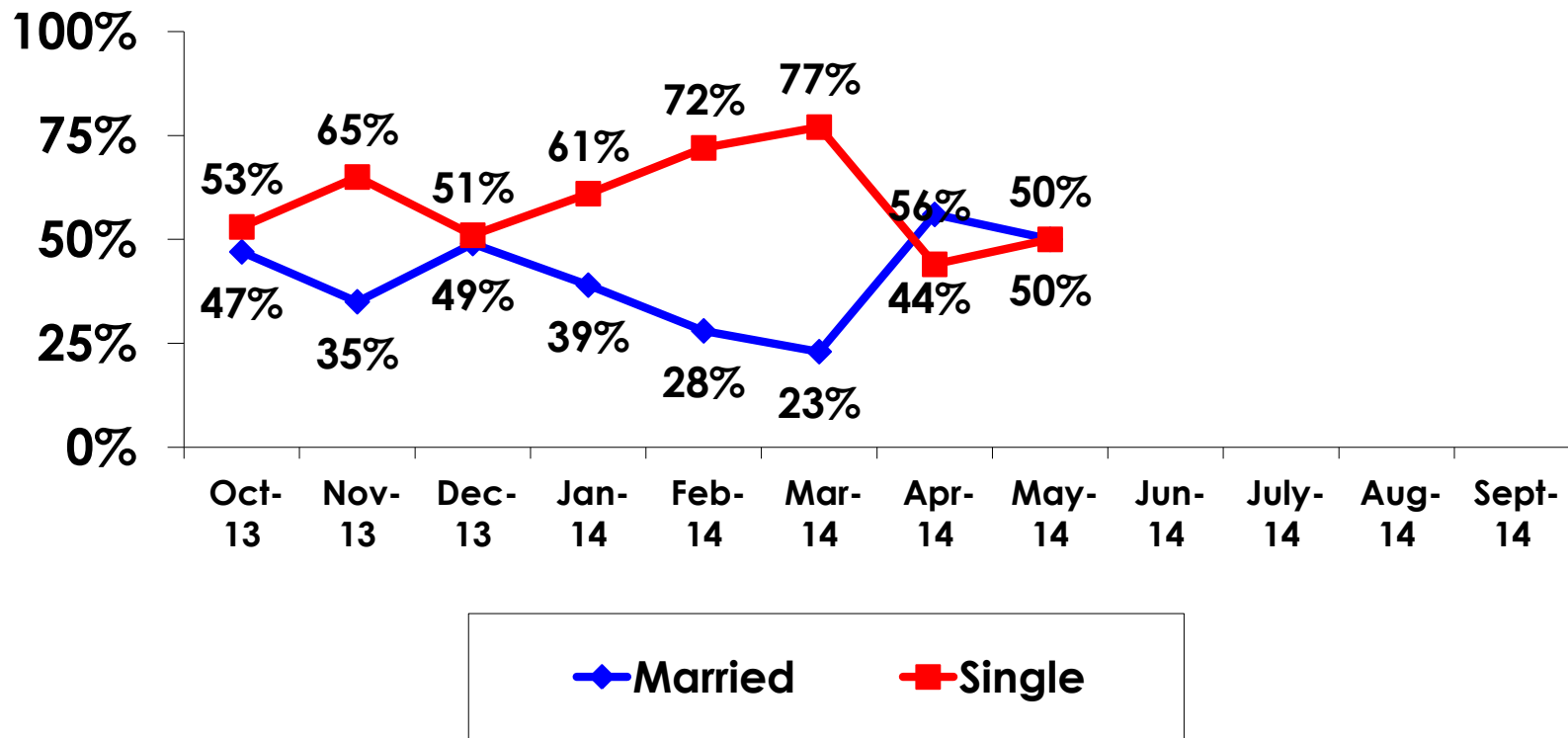
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%	25%	24%	52%	46%				
Office Lady	13%	12%	10%	15%	6%	5%	6%	14%				
Group	6%	5%	4%	3%	5%	6%	5%	9%				
Silver	2%	2%	4%	3%	1%	1%	5%	7%				
Wedding	8%	6%	4%	5%	3%	3%	5%	10%				
Sport	35%	40%	42%	35%	41%	43%	38%	33%				
18-35	64%	71%	61%	67%	78%	79%	50%	64%				
36-55	29%	24%	32%	27%	19%	19%	42%	26%				
Child	15%	9%	22%	14%	11%	13%	28%	11%				
Honeymoon	4%	3%	5%	2%	3%	1%	5%	5%				
Repeat	48%	43%	50%	43%	36%	28%	43%	49%				
TOTAL	351	350	350	350	351	351	350	350				

SECTION 1 **PROFILE OF RESPONDENTS**

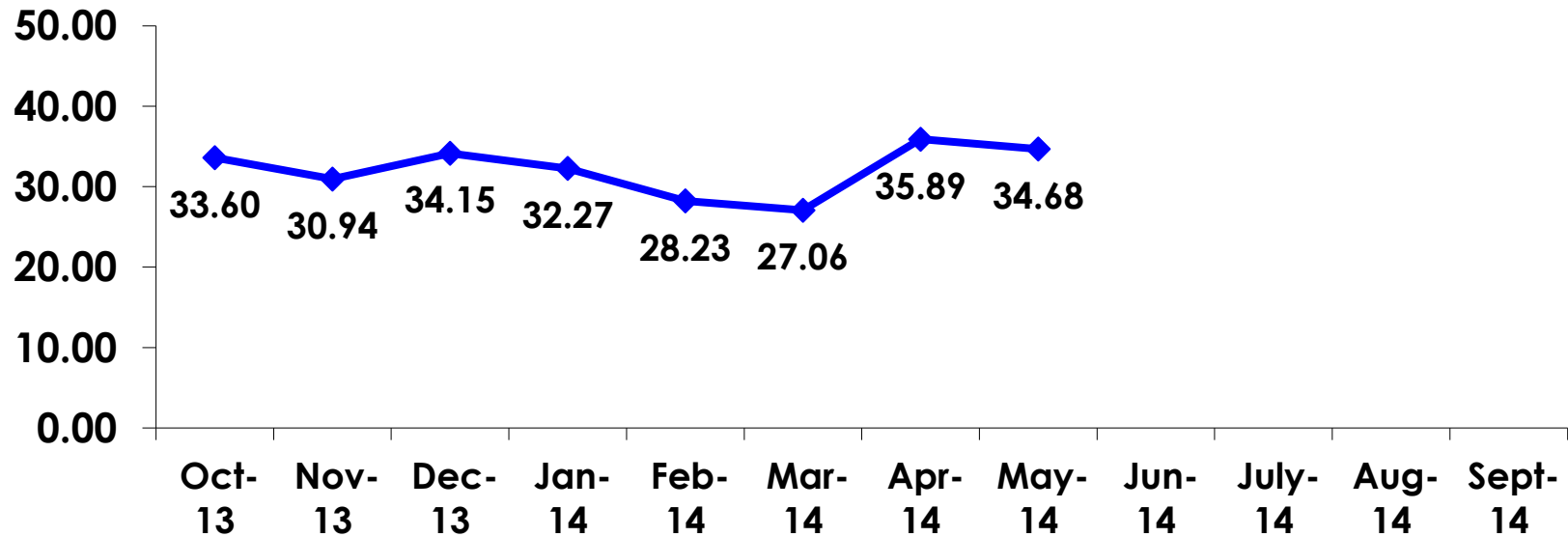
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	50%	82%	31%	50%	87%	77%	38%	32%	80%	95%	94%	59%
	Single	50%	18%	69%	50%	13%	23%	62%	68%	20%	5%	6%	41%
	Total Count	350	162	48	30	23	35	117	223	92	37	16	173

AVERAGE AGE - TRACKING



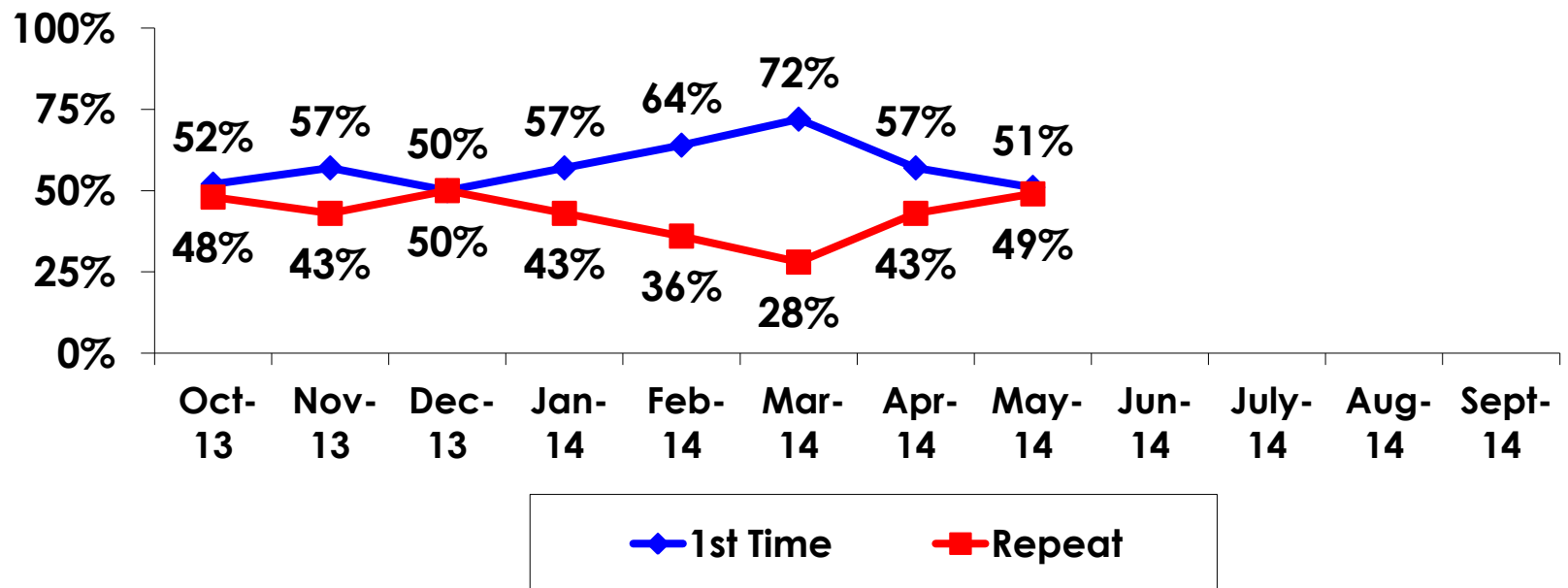
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	22%	9%	23%	33%		3%	27%	34%			6%	14%
	25-34	41%	39%	52%	23%		51%	49%	63%		27%	69%	35%
	35-49	23%	30%	15%	33%		20%	15%	3%	78%	65%	25%	31%
	50+	15%	22%	10%	10%	100%	26%	9%		22%	8%		20%
	Total Count	348	161	48	30	23	35	117	223	92	37	16	173
QF	Mean	34.68	38.52	32.46	33.23	63.61	37.97	31.63	26.92	43.77	39.11	31.25	37.87
	Median	31	35	30	30	63	33	28	27	43	40	30	35

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%	6%	3%	9%	9%	6%	7%	2%	3%		5%
	Y2.0M-Y3.0M	12%	6%	25%	30%	13%	17%	16%	15%	7%	5%	13%	6%
	Y3.0M-Y4.0M	13%	12%	13%	3%	17%	11%	12%	17%	2%	3%	13%	10%
	Y4.0M-Y5.0M	23%	17%	21%	30%	26%	23%	22%	26%	16%	14%	31%	18%
	Y5.0M-Y7.0M	20%	24%	21%	20%	9%	17%	23%	17%	32%	27%	31%	24%
	Y7.0M-Y10.0M	13%	20%	6%	7%	22%	14%	9%	8%	22%	22%	6%	18%
	Y10.0M+	12%	14%	8%	7%	4%	9%	9%	8%	20%	27%	6%	16%
	No Income	2%	2%					1%	3%				1%
	Total Count	349	162	48	30	23	35	116	222	92	37	16	173

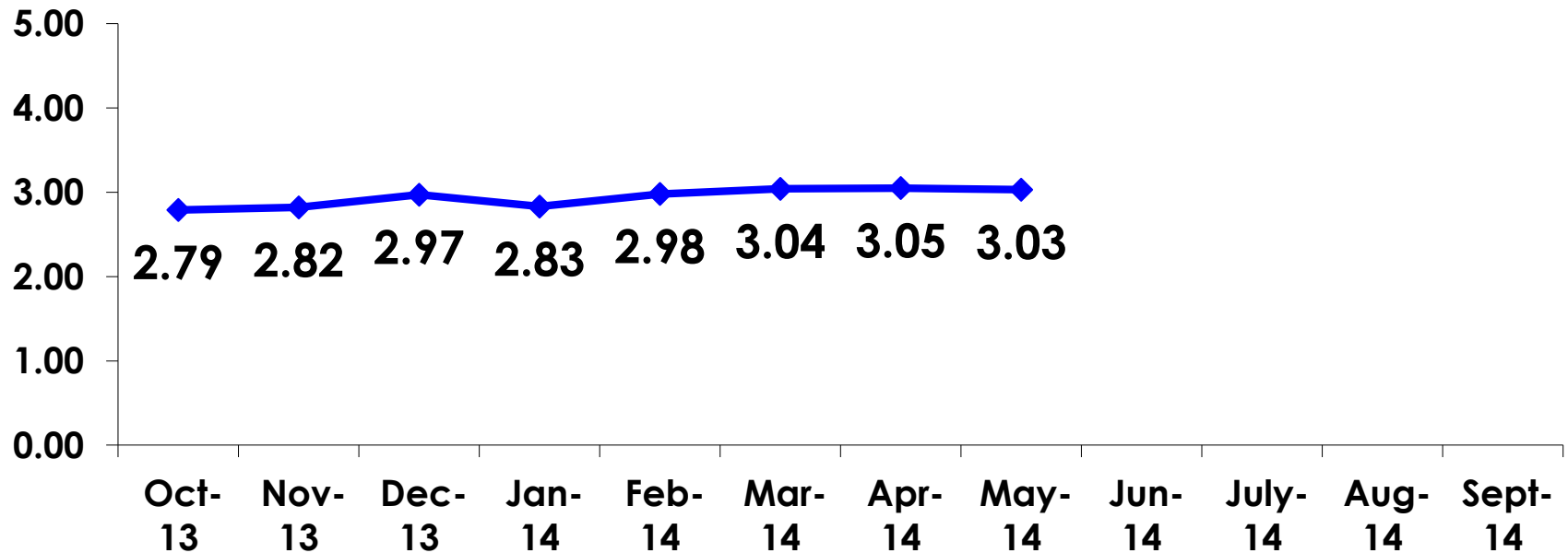
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q3A	Yes	51%	43%	56%	57%	43%	63%	52%	60%	30%	35%	81%		
	No	49%	57%	44%	43%	57%	37%	48%	40%	70%	65%	19%	100%	
	Total	Count	350	162	48	30	23	35	117	223	92	37	16	173

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	3.03	3.31	2.75	2.80	3.78	2.89	3.11	2.88	3.18	3.30	3.69	3.08
	Median	3	3	3	3	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	52%	47%	52%		30%	43%	57%	57%	45%	44%	31%	52%
	Full package tour	23%	30%	25%		39%	43%	23%	24%	15%	22%	56%	19%
	Individually arranged travel (FIT)	11%	17%	10%		17%	3%	5%	5%	24%	25%	6%	17%
	Group tour	9%	3%	8%	100%	4%	6%	9%	8%	13%	6%		8%
	Company paid travel	3%	2%	2%		4%	3%	5%	5%	1%	3%		3%
	Other	2%	2%	2%		4%	3%	1%	2%	1%		6%	1%
	Total Count	347	161	48	30	23	35	116	221	91	36	16	172

TRAVEL MOTIVATION - SEGMENTATION

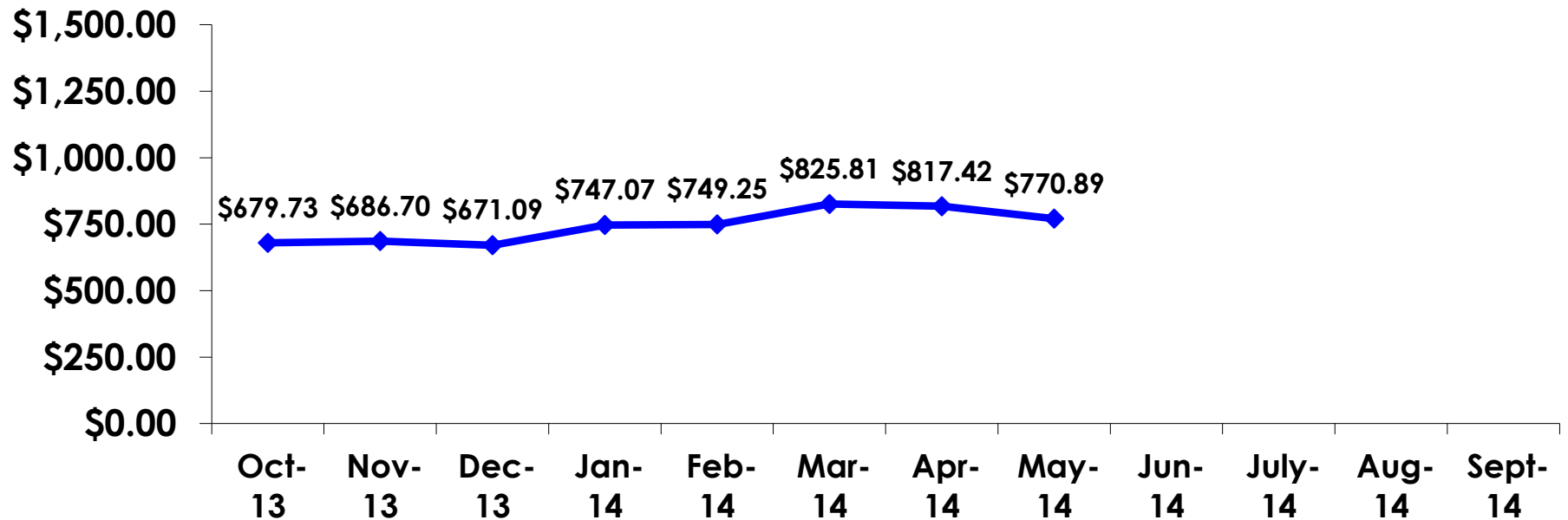
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	35%	43%	23%	27%	43%	23%	33%	30%	47%	51%	6%	72%
	Price	20%	19%	19%	7%	13%		21%	20%	18%	16%	19%	20%
	Visit friends/ Relatives	3%	2%	8%		4%	9%	2%	3%	1%	3%		3%
	Recomm- friend/family/trvl agnt	21%	12%	21%	17%	30%	9%	26%	22%	14%	5%	13%	12%
	Scuba	3%	1%	8%		4%		8%	4%	1%			4%
	Water sports	19%	15%	25%		13%	9%	35%	22%	15%	11%	13%	17%
	Short travel time	46%	45%	48%	7%	48%	11%	52%	44%	49%	46%	63%	51%
	Golf	3%	5%	2%		13%	3%	3%	0%	5%	3%		5%
	Relax	31%	28%	33%	3%	26%	6%	32%	31%	32%	27%	19%	34%
	Company/ Business Trip	13%	6%	10%	77%	9%	3%	17%	14%	15%	8%		12%
	Company Sponsored	2%			13%			3%	2%	1%			2%
	Convention/ Trade/ Conference	0%		2%					0%				
	Safe	24%	27%	27%	3%	35%	6%	26%	22%	27%	27%	13%	26%
	Natural beauty	49%	47%	54%	3%	43%	14%	61%	52%	41%	46%	38%	47%
	Shopping	29%	23%	44%	3%	17%	14%	34%	33%	25%	14%	19%	31%
	Career Cert/ Testing	0%			3%				0%				
	Married/ Attn wedding	10%	19%	10%	7%	17%	100%	3%	9%	10%	19%	31%	8%
	Honeymoon	5%	9%	2%			14%	5%	5%	4%		100%	2%
	Pleasure	42%	34%	44%	17%	30%	11%	52%	46%	33%	19%	25%	44%
	Other	3%	6%					4%	3%	7%	3%		3%
	Total Count	350	162	48	30	23	35	117	223	92	37	16	173

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	76%	75%	79%	60%	57%	77%	80%	78%	78%	76%	75%	77%	
	Travel Guidebook- Bookstore	53%	56%	58%	47%	57%	66%	60%	53%	52%	62%	63%	48%	
	Prior Trip	41%	48%	27%	33%	52%	34%	39%	35%	57%	51%	13%	83%	
	Travel Agent Brochure	38%	40%	44%	27%	26%	49%	45%	40%	37%	35%	63%	29%	
	Magazine (Consumer)	30%	25%	17%	37%	30%	20%	39%	32%	25%	24%	13%	27%	
	Friend/ Relative	28%	21%	33%	20%	30%	34%	32%	35%	11%	8%	31%	21%	
	TV	8%	8%	10%		9%	11%	9%	9%	3%	3%		8%	
	Co-Worker/ Company Trvl Dept	5%	2%	6%	17%			5%	6%	4%	3%	6%	4%	
	Consumer Trvl Show	3%	3%			13%	3%	2%	2%	1%			1%	
	Newspaper	1%	2%			4%	3%	1%	1%	2%	3%	6%	2%	
	GVB Office	1%	1%		3%			1%		3%	5%		1%	
	Other	1%	1%						0%	1%	3%		1%	
	GVB Promo	1%	1%					1%	0%	1%			1%	
	Travel Trade Show	0%				4%								
	Total	Count	350	162	48	30	23	35	117	223	92	37	16	173

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING

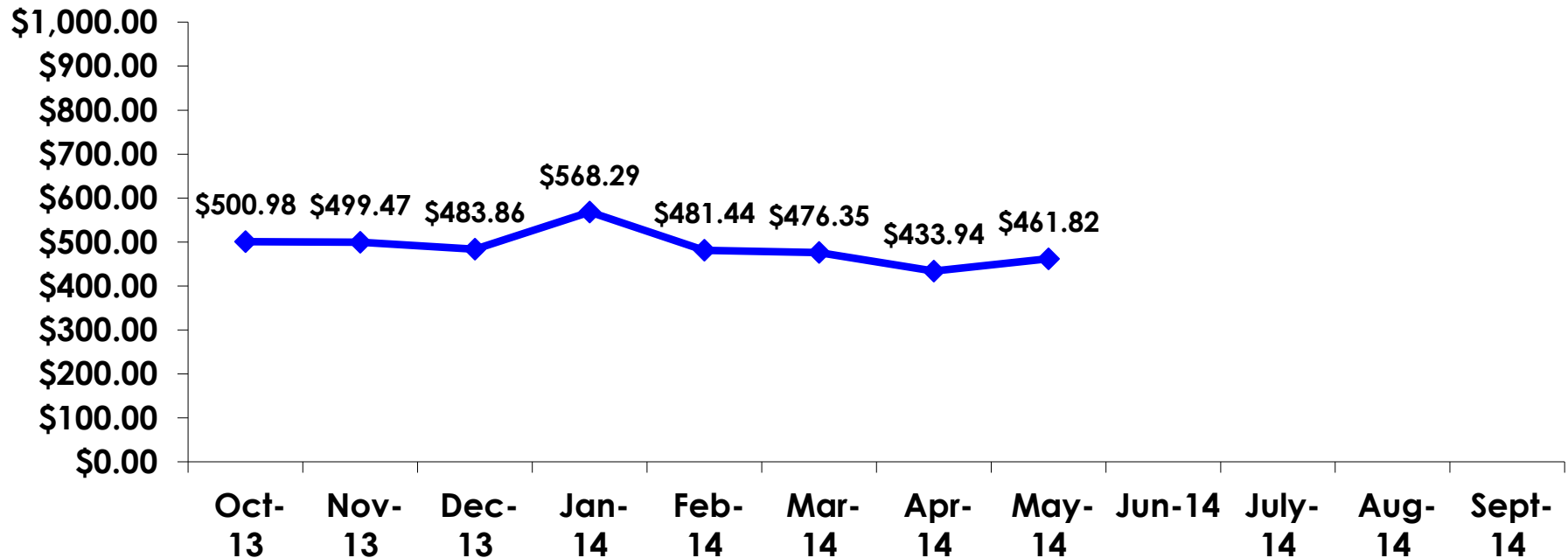


YTD=\$743.48

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	\$770.89	\$827.55	\$924.21	\$382.04	\$753.95	\$1,038.83	\$754.19	\$778.80	\$726.32	\$699.15	\$1,538.03	\$754.49
	Median	\$687	\$761	\$913	\$118	\$805	\$982	\$687	\$687	\$655	\$687	\$1,227	\$687
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$4,910	\$4,910	\$2,618	\$2,946	\$1,571	\$4,910	\$3,437	\$4,910	\$4,910	\$1,564	\$4,910	\$4,910

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$488.27

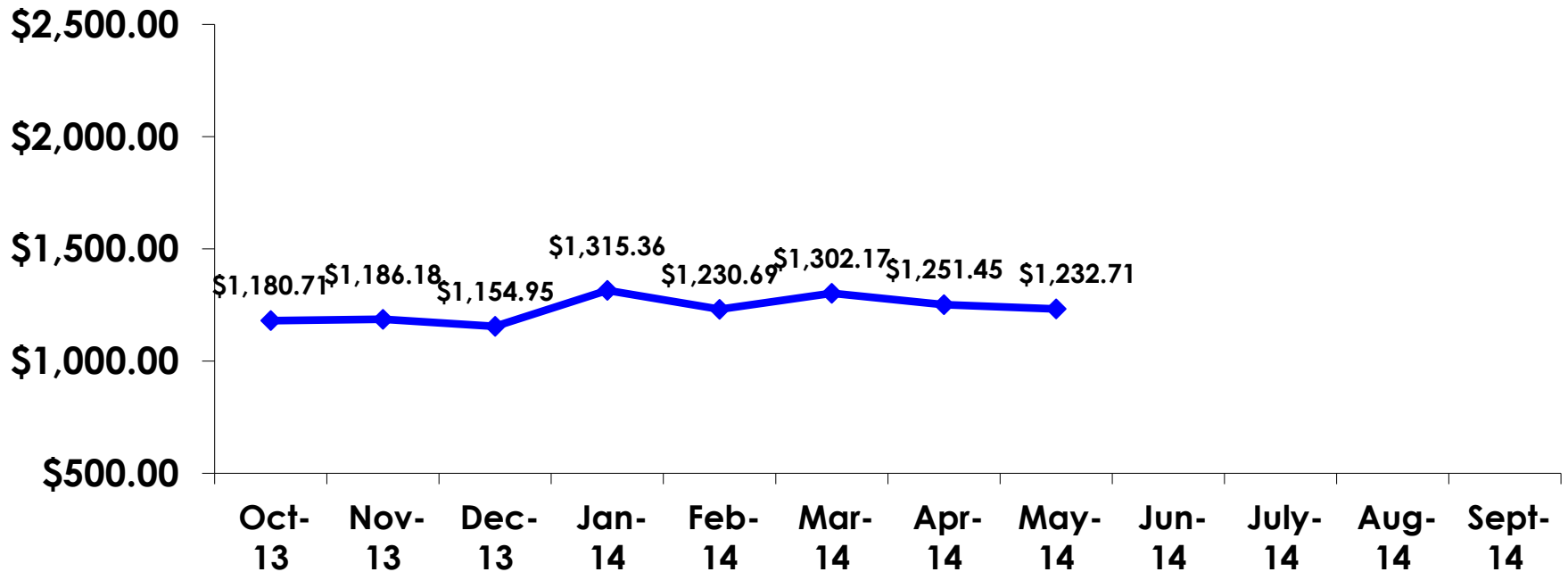
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$461.82	\$414.69	\$450.18	\$391.59	\$511.27	\$358.66	\$462.71	\$439.68	\$508.49	\$331.40	\$463.44	\$505.61
	Median	\$350	\$300	\$370	\$410	\$310	\$300	\$347	\$350	\$332	\$267	\$463	\$350
	Minimum	\$0	\$0	\$0	\$0	\$0	\$67	\$0	\$0	\$0	\$0	\$150	\$0
	Maximum	\$5,000	\$2,150	\$2,000	\$1,000	\$1,350	\$1,452	\$3,500	\$3,500	\$5,000	\$2,150	\$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	\$46.83	\$64.06	\$27.15	\$15.57	\$105.57	\$26.06	\$37.92	\$25.81	\$79.25	\$80.62	\$29.38	\$57.91
	Median	\$0	\$0	\$0	\$0	\$27	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$29.07	\$37.51	\$38.17	\$18.17	\$10.65	\$29.80	\$28.79	\$29.40	\$33.14	\$33.43	\$45.00	\$34.08
	Median	\$0	\$8	\$1	\$0	\$0	\$0	\$0	\$0	\$14	\$6	\$20	\$10
F&B RESTRNT	Mean	\$77.64	\$94.36	\$54.31	\$56.33	\$99.78	\$99.20	\$74.09	\$59.05	\$114.57	\$125.19	\$137.50	\$82.66
	Median	\$0	\$15	\$0	\$0	\$100	\$37	\$10	\$0	\$33	\$0	\$50	\$20
OPT TOUR	Mean	\$54.67	\$60.30	\$59.77	\$38.67	\$47.83	\$53.00	\$83.14	\$48.58	\$68.72	\$66.84	\$31.25	\$56.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$174.08	\$210.75	\$128.96	\$134.20	\$150.65	\$228.49	\$147.52	\$141.72	\$251.66	\$386.00	\$212.50	\$187.78
	Median	\$30	\$50	\$35	\$50	\$100	\$50	\$30	\$30	\$24	\$100	\$0	\$50
GIFT- OTHER	Mean	\$124.81	\$135.72	\$128.63	\$123.67	\$179.57	\$122.29	\$113.22	\$97.69	\$170.11	\$141.08	\$185.63	\$141.10
	Median	\$50	\$50	\$100	\$100	\$100	\$100	\$50	\$50	\$100	\$50	\$200	\$50
TRANS	Mean	\$25.49	\$36.79	\$10.31	\$6.93	\$42.39	\$21.26	\$21.38	\$18.99	\$37.32	\$54.76	\$2.50	\$29.99
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$156.23	\$192.11	\$120.98	\$50.83	\$67.83	\$141.43	\$95.55	\$160.65	\$180.61	\$194.16	\$283.13	\$145.18
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$65	\$0
TOTAL	Mean	\$688.88	\$831.72	\$568.27	\$444.37	\$704.26	\$721.51	\$601.60	\$581.90	\$935.59	\$1,082.62	\$926.88	\$734.83
	Median	\$500	\$635	\$500	\$435	\$600	\$600	\$500	\$500	\$676	\$800	\$925	\$550

TOTAL EXPENDITURES – TRACKING



YTD=\$1,231.78

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	\$1,232.71	\$1,242.24	\$1,374.39	\$773.63	\$1,265.22	\$1,397.49	\$1,216.90	\$1,218.48	\$1,234.81	\$1,030.55	\$2,001.47	\$1,260.10
	Median	\$1,097	\$1,150	\$1,313	\$600	\$1,201	\$1,182	\$1,087	\$1,091	\$1,065	\$921	\$1,700	\$1,088
	Minimum	\$0	\$0	\$0	\$0	\$0	\$67	\$0	\$0	\$0	\$0	\$300	\$0
	Maximum	\$5,884	\$5,260	\$3,767	\$3,196	\$2,773	\$5,260	\$5,464	\$5,464	\$5,884	\$3,296	\$5,260	\$5,884

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 2013, Jan, Feb, Mar, Apr, May 2014, and Overall Oct-2013 - May 2014

	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Combin ed Oct- 2013 - May 2014
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks			3	4	2	1		4	4
Ease of getting around								3	
Safety walking around at night									
Quality of daytime tours	2			3		4		6	
Variety of daytime tours									6
Quality of nighttime tours									9
Variety of nighttime tours									9
Quality of shopping	4		5				1		3
Variety of shopping				1					
Price of things on Guam				5	4	2		5	
Quality of hotel accommodations			2		3				5
Quality/cleanliness of air, sky	3	4			5				8
Quality/cleanliness of parks						5			
Quality of landscape in Tumon	1	2							
Quality of landscape in Guam			1	2	1	3	3	1	1
Quality of ground handler		1					2		7
Quality/cleanliness of transportation vehicles		3	4				4	2	2
% of Per Person On Island Expenditures Accounted For	45.2%	41.7%	47.4%	42.5%	52.4%	51.5%	35.8%	56.0%	46.2%

NOTE: Only significant drivers are included.

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by six significant factors in the May 2014 Period. By rank order they are:
 - **Quality of landscape on Guam,**
 - **Quality/cleanliness of transportation vehicles,**
 - **Ease of getting around,**
 - **Quality & cleanliness of beaches & parks,**
 - **Price of things on Guam, and**
 - **Quality of daytime tours.**
- With all six factors the overall r^2 is .560 meaning that **56.0% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2013, Jan, Feb, Mar, Apr, May 2014 and Overall Oct-2013-May 2014									
	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Combin ed Oct- 2013- May 2014
Drivers:	rank	rank	rank	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									1
Quality of shopping									2
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								1	3
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%	0.0%	0.0%	2.3%	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 one significant factor in the May 2014 Period. That factor is:
 - **Quality of landscape in Tumon.**
- With this factor, the overall r^2 is .023 meaning that **2.3% of per person on island expenditure is accounted for by this factor.**