



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015 Market Segmentation

MARCH 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 **352** 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 **352** 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

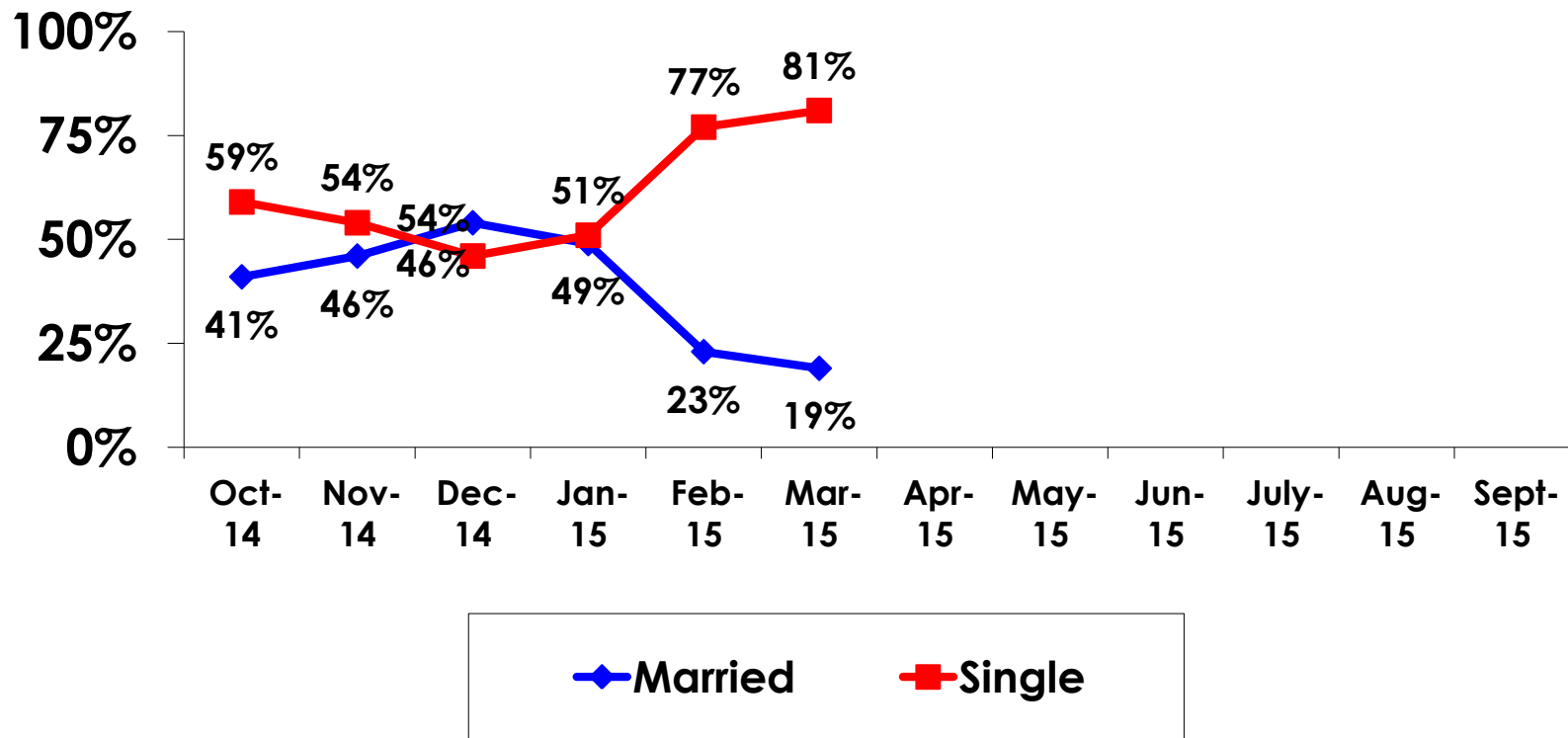
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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
Families	36%	39%	59%	46%	23%	21%						
Office Lady	13%	11%	10%	12%	8%	2%						
Group	5%	3%	1%	4%	5%	4%						
Silver	2%	5%	3%	5%	3%	0%						
Wedding	9%	6%	0%	3%	2%	1%						
Sport	32%	29%	35%	27%	33%	41%						
18-35	71%	63%	48%	56%	83%	84%						
36-55	25%	29%	46%	36%	13%	13%						
Child	11%	12%	35%	19%	7%	10%						
Honey-moon	4%	5%	3%	4%	4%	2%						
Repeat	43%	43%	51%	50%	34%	25%						
TOTAL	351	350	351	350	350	352						

SECTION 1 **PROFILE OF RESPONDENTS**

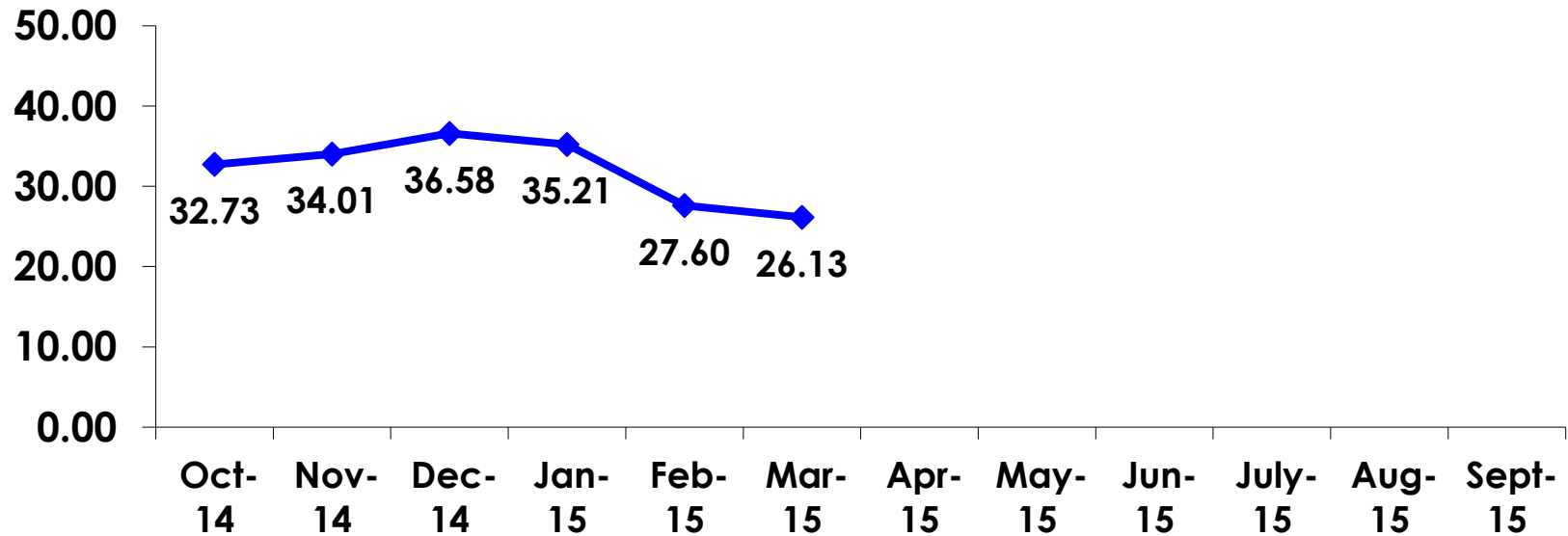
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	19%	71%	14%	7%	100%	100%	15%	8%	87%	79%	100%	44%
	Single	81%	29%	86%	93%			85%	92%	13%	21%		56%
	Total Count	349	75	7	14	1	5	144	295	45	34	6	87

AVERAGE AGE - TRACKING



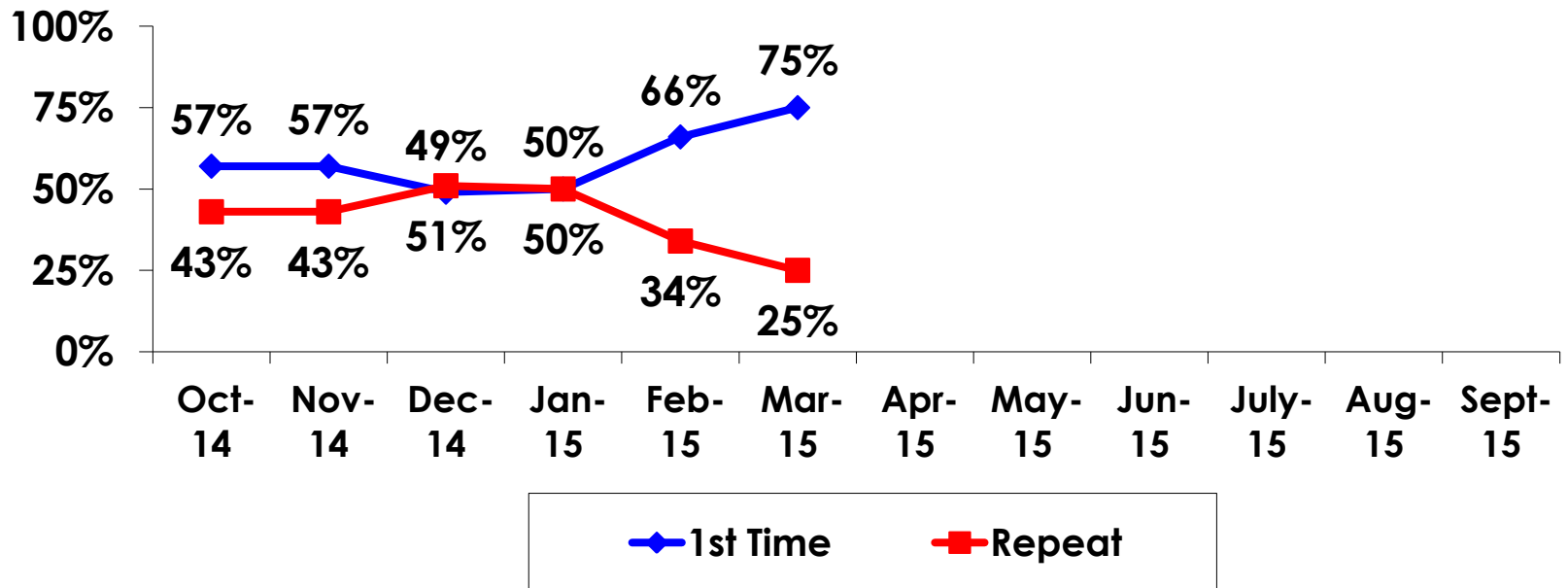
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	71%	25%	43%	92%		20%	80%	84%		15%	17%	40%
	25-34	13%	21%	29%			40%	10%	15%		15%	83%	18%
	35-49	12%	41%	29%	8%		20%	8%	1%	87%	65%		31%
	50+	4%	12%			100%	20%	2%		13%	6%		11%
	Total Count	349	75	7	13	1	5	144	297	45	34	6	88
QF	Mean	26.13	35.85	30.29	23.62	65.00	37.00	24.42	22.71	43.73	37.41	29.33	32.91
	Median	22	36	25	22	65	33	22	22	43	39	30	29

INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	11%	7%	14%	17%		20%	14%	13%	2%	6%	17%	11%
	Y2.0M-Y3.0M	9%	6%	14%	8%	100%		9%	11%		6%	17%	9%
	Y3.0M-Y4.0M	8%	1%	14%			20%	8%	9%	5%		17%	4%
	Y4.0M-Y5.0M	11%	16%		8%			8%	12%	7%	18%	17%	13%
	Y5.0M-Y7.0M	18%	22%	14%	17%		40%	17%	15%	32%	15%	33%	18%
	Y7.0M-Y10.0M	17%	29%	29%	17%		20%	18%	13%	32%	36%		22%
	Y10.0M+	18%	14%	14%	17%			18%	17%	23%	18%		18%
	No Income	8%	4%		17%			9%	10%				4%
	Total Count	288	69	7	12	1	5	120	236	44	33	6	76

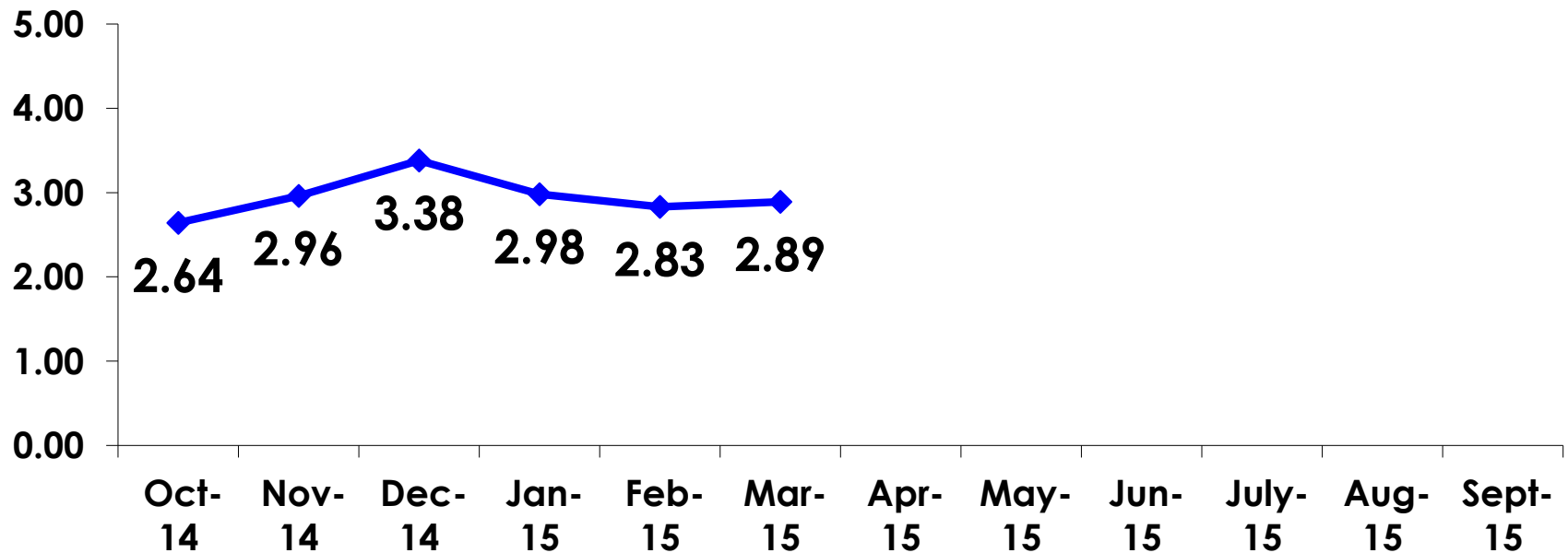
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	75%	52%	57%	79%		80%	79%	82%	31%	38%	100%	
	No	25%	48%	43%	21%	100%	20%	21%	18%	69%	62%		100%
	Total Count	352	75	7	14	1	5	145	297	45	34	6	88

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	2.89	3.09	3.29	2.86	3.00	3.60	2.92	2.84	3.13	3.32	3.50	3.05
	Median	3	3	3	3	3	4	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	67%	58%	86%			20%	70%	67%	67%	65%	20%	64%	
	Full package tour	24%	27%			100%	60%	21%	24%	21%	13%	80%	22%	
	Individually arranged travel (FIT)	5%	13%				20%	3%	4%	10%	19%		10%	
	Group tour	4%	3%		100%			5%	4%	2%	3%		3%	
	Company paid travel	1%		14%				1%	1%					
	Total	Count	344	71	7	14	1	5	141	292	42	31	5	87

TRAVEL MOTIVATION - SEGMENTATION

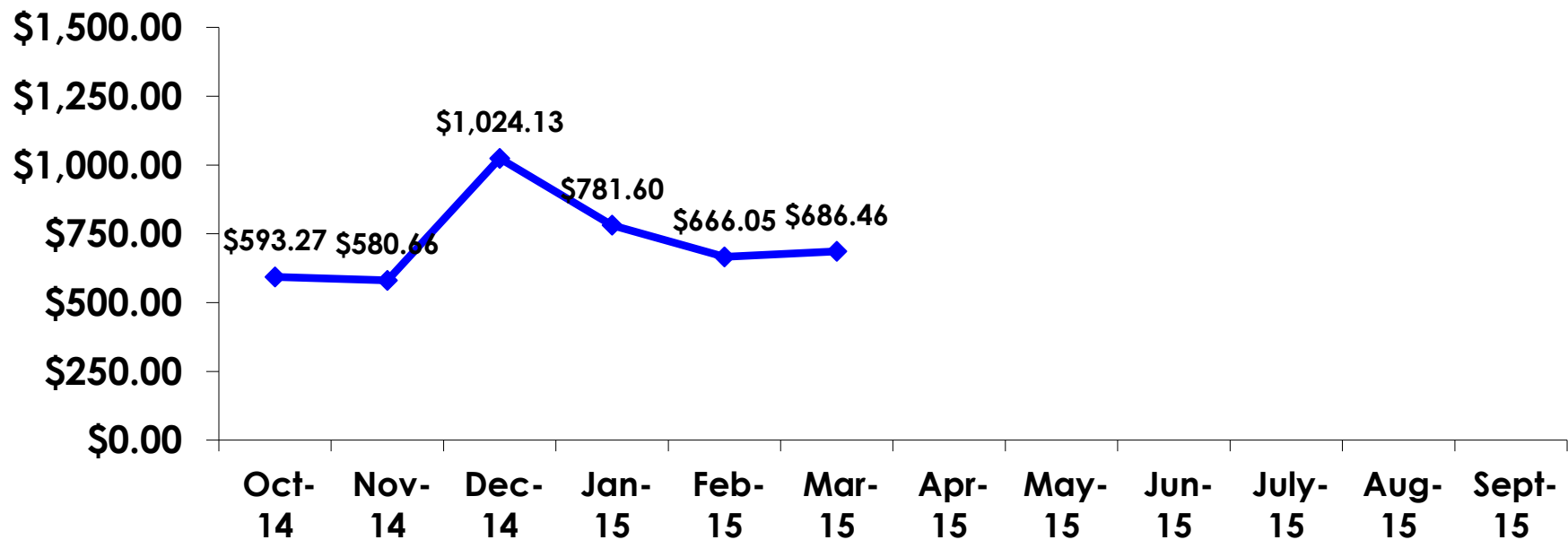
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	17%	36%	43%	21%	100%	20%	14%	11%	53%	50%		69%	
	Price	29%	23%	14%	14%			30%	31%	24%	18%	17%	24%	
	Visit friends/ Relatives	3%	1%					1%	3%				3%	
	Recomm- friend/family/trvl agnt	38%	16%	43%	36%	100%		39%	42%	18%	3%	17%	20%	
	Scuba	7%	4%					15%	7%	2%	3%	17%	7%	
	Water sports	26%	11%	14%	21%			43%	29%	11%	15%		15%	
	Short travel time	48%	49%	43%	21%		60%	50%	46%	62%	50%	33%	52%	
	Golf	2%	4%			100%		3%	1%	7%	6%		6%	
	Relax	30%	39%	57%			20%	23%	30%	36%	47%	17%	36%	
	Company/ Business Trip	4%	1%	14%	7%			4%	4%	4%	3%		2%	
	Company Sponsored	1%	4%		7%	100%		1%		4%	6%		3%	
	Safe	24%	27%	29%	14%			28%	22%	33%	29%	33%	31%	
	Natural beauty	66%	61%	71%	43%	100%	40%	70%	69%	51%	62%	50%	63%	
	Shopping	31%	28%	57%				29%	32%	27%	35%	17%	35%	
	Career Cert/ Testing	1%							1%				1%	
	Married/ Attn wedding	1%	7%				100%	1%	1%	2%	3%	33%	1%	
	Honeymoon	2%	8%				40%	2%	2%		3%	100%		
	Pleasure	54%	55%	57%	21%		20%	59%	56%	47%	59%	33%	52%	
	Organized sports	1%						1%	1%	2%			1%	
	Other	8%	7%		7%			8%	7%	9%	9%		7%	
	Total	Count	351	75	7	14	1	5	145	296	45	34	6	88

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	86%	87%	100%	100%		100%	89%	87%	87%	82%	100%	76%	
	Travel Agent Brochure	49%	43%	86%	29%		80%	52%	51%	40%	35%	83%	42%	
	Travel Guidebook- Bookstore	47%	43%	86%	36%		80%	48%	47%	40%	41%	67%	43%	
	Friend/ Relative	41%	20%	57%	43%		40%	46%	45%	18%	6%	50%	24%	
	Magazine (Consumer)	41%	35%	43%	36%		40%	43%	42%	29%	29%	50%	32%	
	Prior Trip	20%	43%	29%	21%	100%		17%	14%	58%	59%		82%	
	TV	18%	11%	29%	7%			19%	20%	7%	12%	17%	11%	
	Consumer Trvl Show	5%	7%		7%			8%	4%	2%	6%		2%	
	Co-Worker/ Company Trvl Dept	1%	1%	14%				1%	1%		3%		2%	
	Newspaper	1%	1%					1%	1%	2%	3%		2%	
	Other	1%	3%					1%	1%				1%	
	Theater Ad	1%						1%	1%					
	Radio	1%	1%					1%	1%		3%			
	GVB Office	1%	1%						1%					
	Travel Trade Show	0%			7%			1%	0%					
	Total	Count	352	75	7	14	1	5	145	297	45	34	6	88

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$722.64

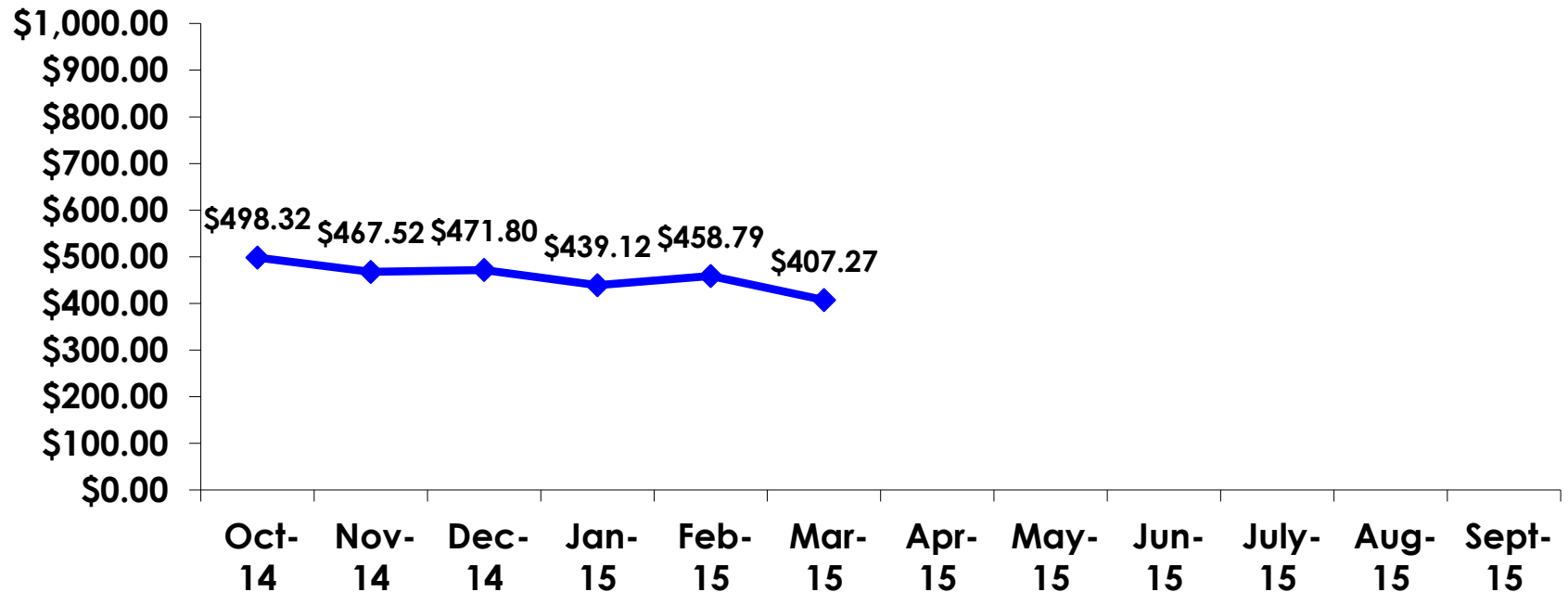
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$686.46	\$834.10	\$663.24	\$535.92	\$0.00	\$1,840.49	\$732.85	\$660.07	\$867.62	\$814.34	\$1,803.18	\$693.08
	Median	\$663	\$746	\$763	\$547	\$0	\$995	\$663	\$622	\$837	\$801	\$1,161	\$663
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$6,425	\$6,425	\$1,335	\$829	\$0	\$6,425	\$6,425	\$6,425	\$1,990	\$1,990	\$6,425	\$1,990

PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$971.02	\$1,986.11	\$1,445.86	\$768.76	.	\$2,818.77	\$921.78	\$801.92	\$2,132.24	\$2,624.48	\$2,238.43	\$1,226.44
	Median	\$663	\$1,658	\$663	\$580	.	\$2,819	\$589	\$580	\$1,658	\$2,156	\$2,238	\$763
AIR/ HOTEL/ MEAL	Mean	\$2,152.40	\$4,077.42	.	\$679.82	.	\$12,850.27	\$2,152.34	\$1,750.78	\$3,529.38	\$3,785.99	\$5,941.52	\$2,715.14
	Median	\$1,161	\$2,653	.	\$680	.	\$12,850	\$995	\$995	\$2,985	\$2,819	\$2,487	\$1,202
AIR ONLY	Mean	\$1,033.55	\$1,747.22	\$737.85	\$522.30	.	\$2,321.34	\$248.71	\$777.65	\$1,214.56	\$1,214.56	.	\$835.27
	Median	\$663	\$2,073	\$738	\$522	.	\$2,321	\$249	\$332	\$1,215	\$1,215	.	\$593
HOTEL ONLY	Mean	\$552.70	\$1,202.12	.	.	.	\$994.86	\$248.71	\$248.71	\$1,409.38	\$1,409.38	.	\$607.97
	Median	\$249	\$1,202	.	.	.	\$995	\$249	\$249	\$1,409	\$1,409	.	\$249
HOTEL & MEAL	Mean	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.
F&B HOTEL	Mean	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.
TRANS- JAPAN	Mean	\$48.67	\$27.86	\$12.44	\$41.45	.	.	\$68.25	\$50.31	\$29.02	\$29.02	.	\$24.48
	Median	\$25	\$23	\$12	\$41	.	.	\$25	\$25	\$21	\$21	.	\$17
TRANS- GUAM	Mean	\$59.07	\$99.49	.	.	.	.	\$16.58	\$18.65	\$99.49	.	.	\$99.49
	Median	\$27	\$99	.	.	.	.	\$17	\$19	\$99	.	.	\$99
OPT TOURS	Mean	\$180.94	\$314.45	\$146.47	\$140.94	.	\$663.24	\$157.07	\$149.40	\$538.88	\$248.71	\$165.81	\$253.45
	Median	\$124	\$166	\$166	\$141	.	\$663	\$141	\$124	\$539	\$249	\$166	\$141
OTHER	Mean	\$229.14	\$580.33	.	.	.	.	\$402.09	\$158.42	\$1,077.76	\$1,077.76	.	\$435.25
	Median	\$124	\$580	.	.	.	.	\$336	\$116	\$1,078	\$1,078	.	\$311
TOTAL	Mean	\$1,047.65	\$2,149.86	\$1,206.86	\$702.92	\$0.00	\$4,493.45	\$1,016.40	\$847.87	\$2,300.61	\$2,599.32	\$3,744.54	\$1,327.59
	Median	\$663	\$1,658	\$763	\$568	\$0	\$3,979	\$688	\$663	\$1,675	\$2,238	\$2,487	\$829

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$457.10

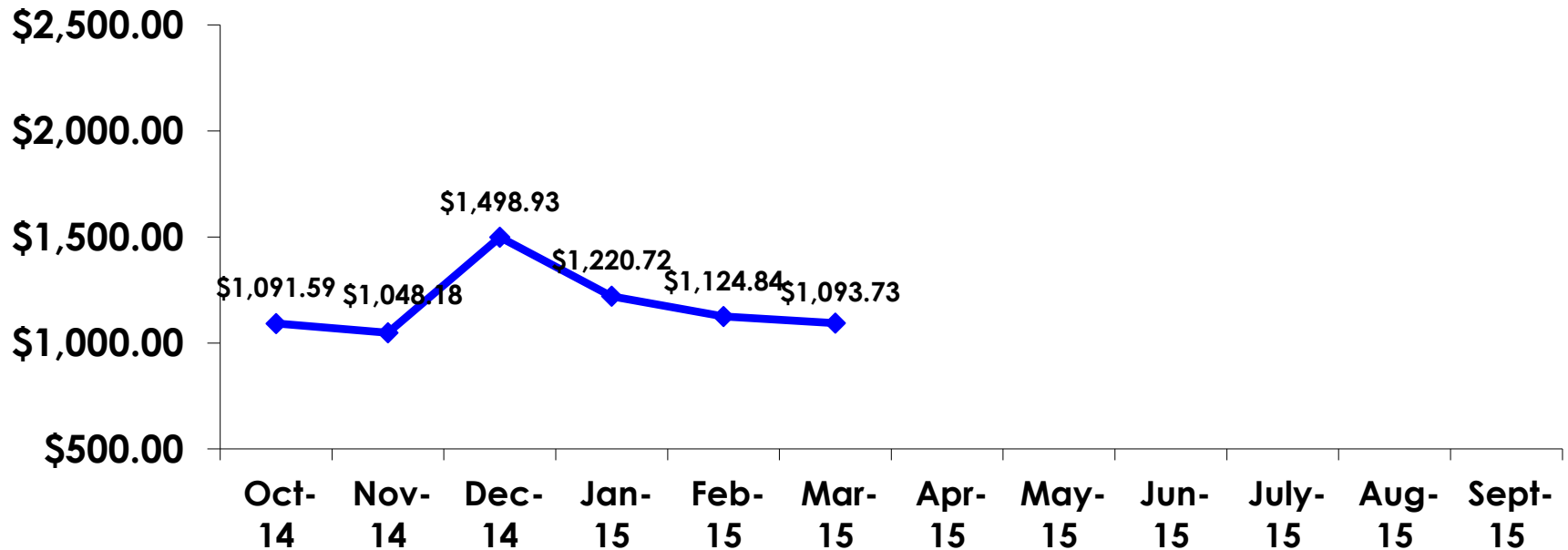
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$407.27	\$481.12	\$571.90	\$338.00	\$300.00	\$775.00	\$377.31	\$388.03	\$528.28	\$516.29	\$898.61	\$483.67
	Median	\$333	\$333	\$400	\$325	\$300	\$500	\$300	\$310	\$380	\$333	\$718	\$398
	Minimum	\$0	\$0	\$233	\$100	\$300	\$0	\$0	\$0	\$0	\$155	\$207	\$0
	Maximum	\$2,500	\$2,250	\$1,570	\$532	\$300	\$2,250	\$2,250	\$2,500	\$2,500	\$2,000	\$2,250	\$2,500

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	\$27.28	\$55.59	\$57.86	\$21.43	\$0.00	\$26.00	\$22.96	\$21.35	\$56.00	\$58.12	\$23.33	\$38.53
F&B FF/STORE	Mean	\$29.49	\$40.61	\$28.57	\$31.29	\$50.00	\$4.00	\$30.94	\$29.78	\$31.47	\$46.94	\$83.33	\$24.52
F&B RESTRNT	Mean	\$70.18	\$126.80	\$165.71	\$55.00	\$0.00	\$166.00	\$76.41	\$58.02	\$146.47	\$174.41	\$108.33	\$115.97
OPT TOUR	Mean	\$52.83	\$86.27	\$42.86	\$54.29	\$240.00	\$130.00	\$74.54	\$46.80	\$95.69	\$127.94	\$61.67	\$67.77
GIFT- SELF	Mean	\$99.43	\$199.80	\$341.43	\$4.14	\$30.00	\$0.00	\$55.74	\$80.16	\$230.22	\$297.35	\$139.17	\$169.61
GIFT- OTHER	Mean	\$111.53	\$172.87	\$202.14	\$43.57	\$280.00	\$1,100.00	\$102.19	\$103.43	\$180.22	\$163.82	\$885.83	\$102.07
TRANS	Mean	\$12.60	\$23.52	\$15.71	\$3.86	\$0.00	\$0.00	\$11.45	\$11.79	\$18.51	\$33.65	\$15.00	\$16.76
OTHER	Mean	\$191.02	\$457.16	\$8.57	\$181.57	\$0.00	\$574.00	\$140.61	\$149.84	\$386.22	\$516.65	\$515.00	\$299.59
TOTAL	Mean	\$592.45	\$1,162.61	\$862.86	\$395.14	\$600.00	\$2,000.00	\$508.66	\$498.74	\$1,145.91	\$1,418.88	\$1,831.67	\$836.03

TOTAL EXPENDITURES – TRACKING



YTD=\$1,179.73

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	\$1,093.73	\$1,315.22	\$1,235.14	\$873.92	\$300.00	\$2,615.49	\$1,110.16	\$1,048.10	\$1,395.90	\$1,330.63	\$2,701.79	\$1,176.75
	Median	\$982	\$1,146	\$1,363	\$893	\$300	\$1,536	\$997	\$963	\$1,345	\$1,174	\$1,878	\$1,059
	Minimum	\$0	\$0	\$300	\$374	\$300	\$500	\$0	\$0	\$0	\$333	\$500	\$300
	Maximum	\$8,675	\$8,675	\$2,407	\$1,329	\$300	\$8,675	\$8,675	\$8,675	\$3,744	\$2,746	\$8,675	\$3,744

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 2014, Jan, Feb, Mar 2015, and Overall Oct-2014 - Mar 2015							
	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Combin ed Oct- 2014 - Mar 2015
Drivers:	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks		3			3	2	3
Ease of getting around							
Safety walking around at night							
Quality of daytime tours		5	4				6
Variety of daytime tours							
Quality of nighttime tours							
Variety of nighttime tours							
Quality of shopping	3				4	3	4
Variety of shopping		4		2			
Price of things on Guam							
Quality of hotel accommodations			2		5	1	2
Quality/cleanliness of air, sky							
Quality/cleanliness of parks		1					
Quality of landscape in Tumon	2						
Quality of landscape in Guam		2	1	1	1		1
Quality of ground handler	1						7
Quality/cleanliness of transportation vehicles			3	3	2		5
% of Overall Satisfaction Accounted For	47.0%	52.7%	37.9%	35.6%	44.5%	33.0%	41.5%

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 March 2015 Period. By rank order they are:
 - **Quality of hotel accommodations,**
 - **Quality & cleanliness of beaches & parks, and**
 - **Quality of shopping.**
- With all three factors the overall r^2 is .33 meaning that **33.0% 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 2014 and Overall Oct-2013-Mar 2014							
	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Combined Oct-2014-Mar 2015
Drivers:	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks							3
Ease of getting around			1				2
Safety walking around at night							
Quality of daytime tours							
Variety of daytime tours							
Quality of nighttime tours							
Variety of nighttime tours							
Quality of shopping							1
Variety of shopping			2				
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%	5.3%	0.0%	0.0%	0.0%	1.5%

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 March 2015 Period.