



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2016 Market Segmentation

DECEMBER 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 **356** 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 **356** 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

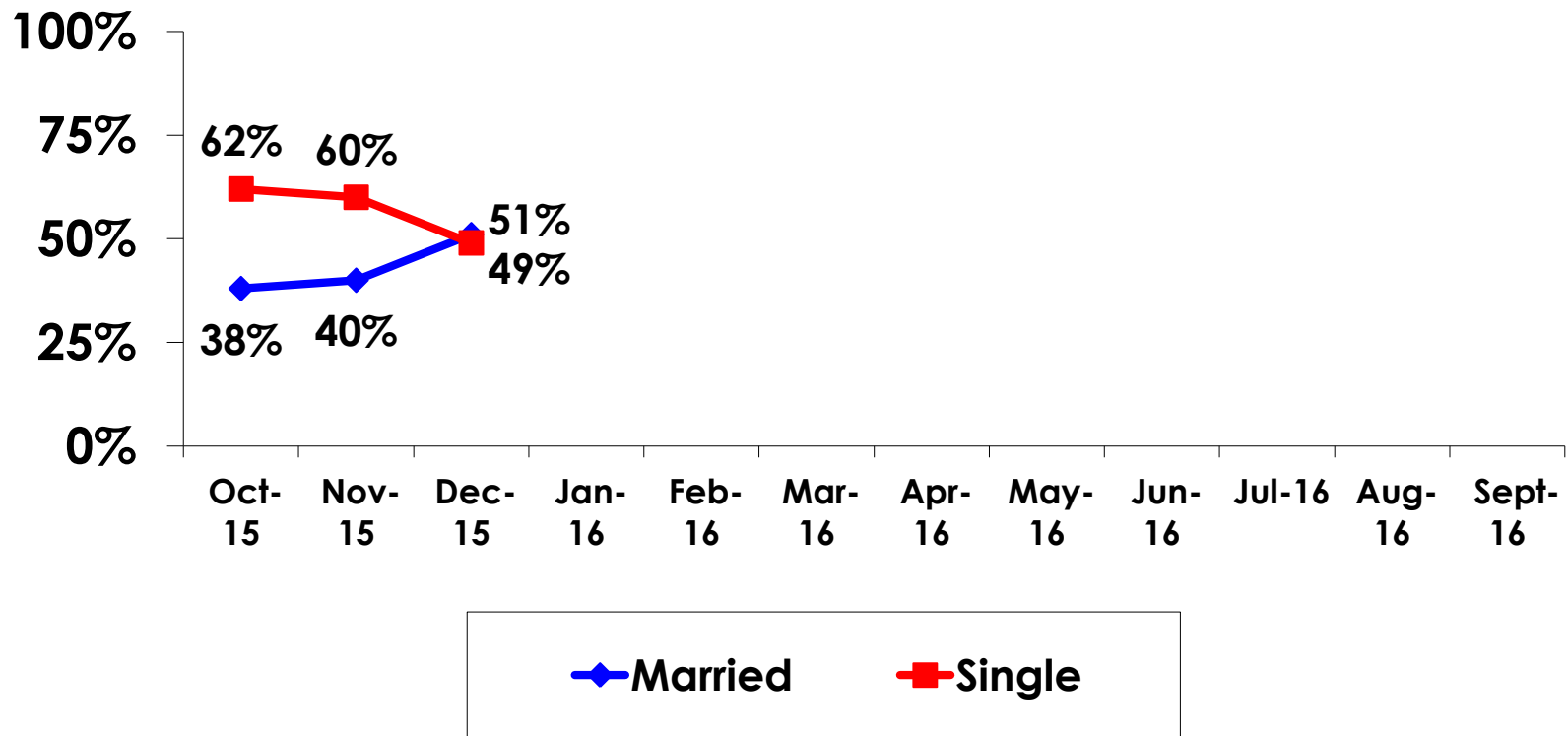
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

Highlighted Segments

	Oct 15	Nov 15	Dec 15	Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16	July 16	Aug 16	Sept 16
Families	31%	36%	48%									
Office Lady	9%	12%	10%									
Group	5%	7%	5%									
Silver	6%	2%	4%									
Wedding	7%	9%	3%									
Sport	31%	37%	33%									
18-35	73%	66%	55%									
36-55	19%	29%	37%									
Child	6%	14%	26%									
Honey-moon	7%	3%	5%									
Repeat	35%	46%	50%									
TOTAL	351	351	356									

SECTION 1 **PROFILE OF RESPONDENTS**

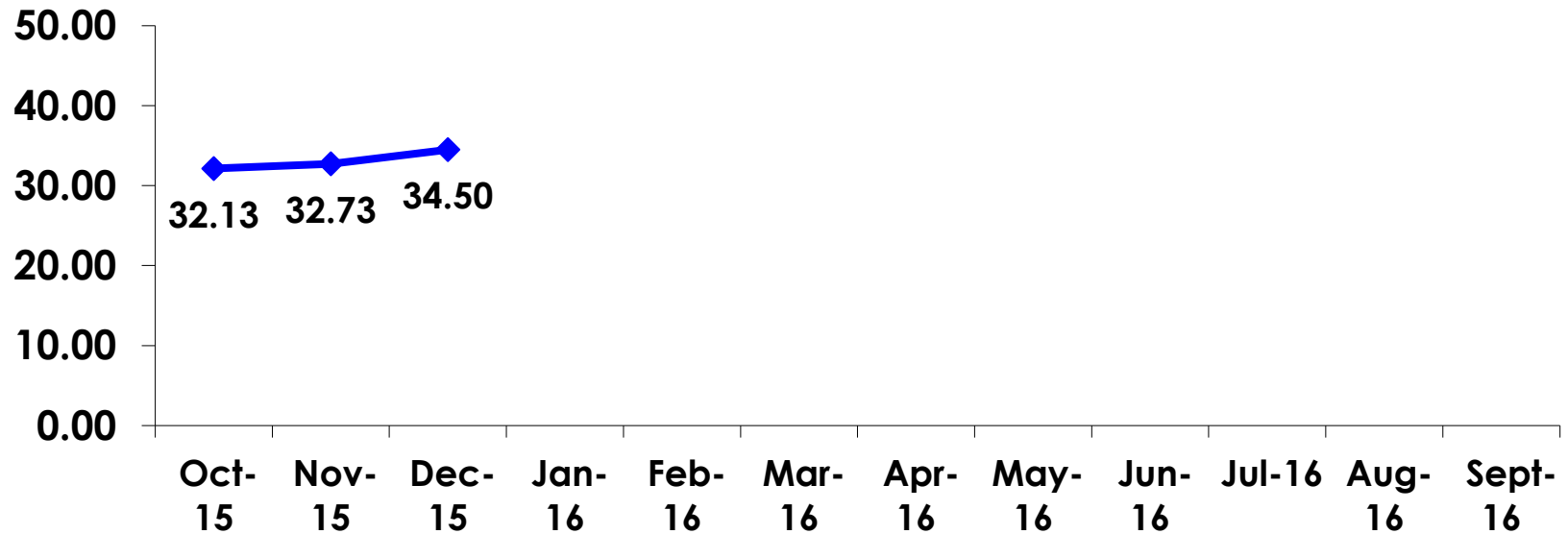
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	51%	90%	32%	18%	92%	67%	50%	24%	85%	95%	94%	64%
	Single	49%	10%	68%	82%	8%	33%	50%	76%	15%	5%	6%	36%
	Total Count	354	170	37	17	13	12	115	195	131	92	17	176

AVERAGE AGE - TRACKING



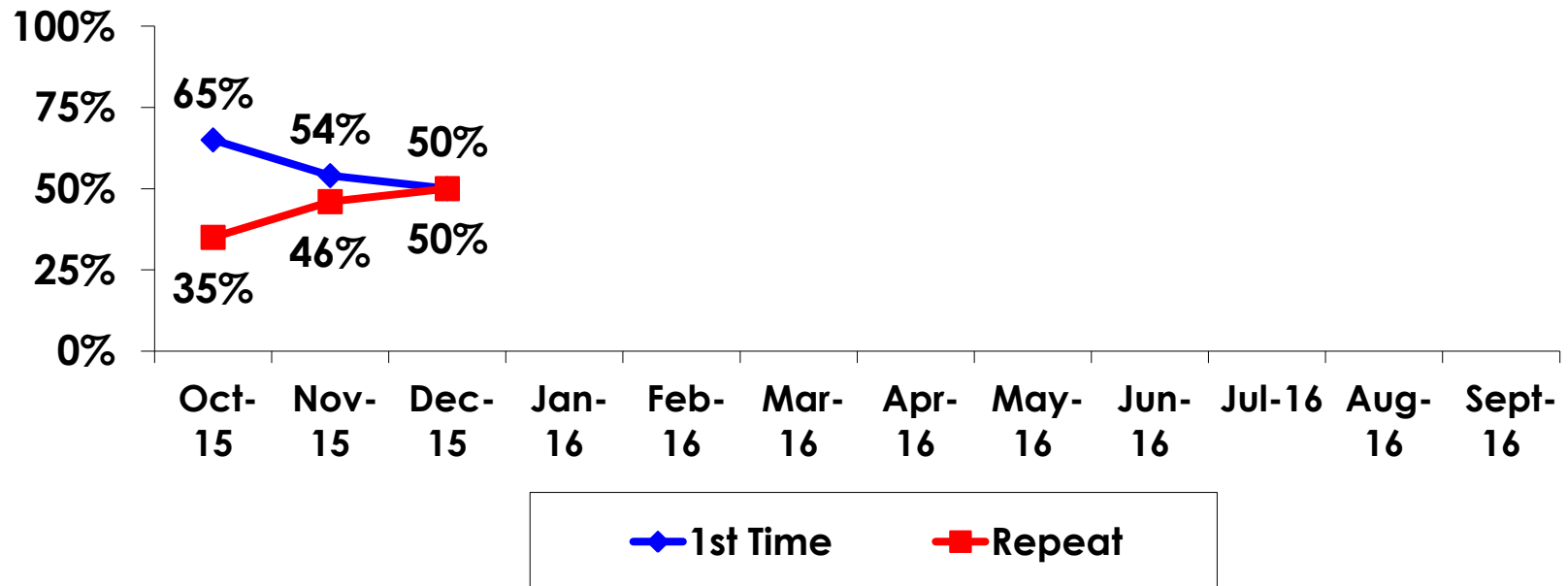
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	29%	9%	27%	71%		8%	26%	51%		2%	12%	20%
	25-34	26%	20%	46%	12%		75%	26%	46%		10%	76%	18%
	35-49	34%	53%	24%	12%		17%	32%	3%	86%	77%	12%	45%
	50+	12%	18%	3%	6%	100%		16%		14%	11%		16%
	Total Count	352	169	37	17	13	12	115	197	131	92	17	176
QF	Mean	34.50	40.37	30.14	25.59	64.00	32.17	35.45	25.25	43.55	42.05	28.88	37.98
	Median	31	40	28	20	64	30	33	24	43	42	29	40

INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	3%	1%	10%	17%	8%		2%	6%		1%		4%
	Y2.0M-Y3.0M	8%	4%	10%	8%	8%		9%	13%	2%	1%	12%	5%
	Y3.0M-Y4.0M	14%	8%	21%	8%	8%	18%	8%	17%	11%	6%	29%	11%
	Y4.0M-Y5.0M	13%	13%	7%	17%	15%	18%	18%	17%	10%	12%	18%	13%
	Y5.0M-Y7.0M	21%	25%	17%	17%	23%	45%	22%	19%	24%	26%	24%	22%
	Y7.0M-Y10.0M	17%	23%	24%	8%	15%	18%	16%	10%	27%	27%	6%	20%
	Y10.0M+	20%	23%	10%	8%	15%		22%	14%	25%	27%	6%	24%
	No Income	3%	2%		17%	8%		2%	4%	1%	1%	6%	1%
	Total Count	320	166	29	12	13	11	107	166	126	90	17	165

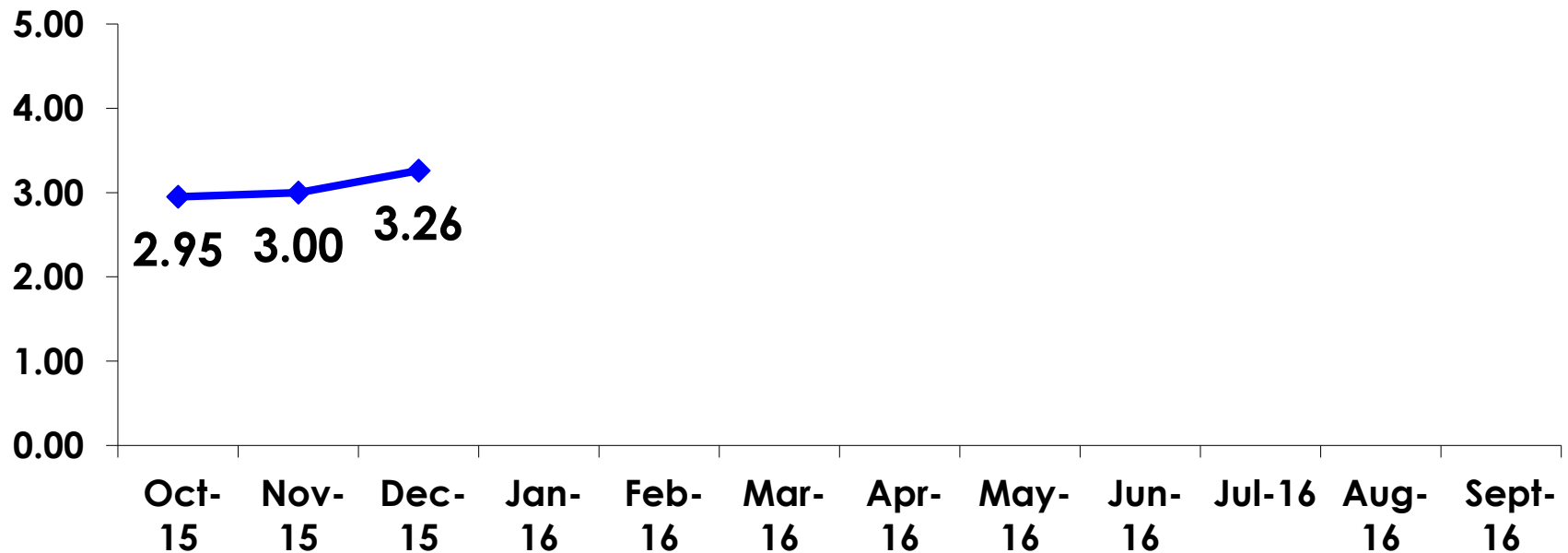
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	50%	37%	51%	76%	15%	67%	55%	65%	31%	27%	82%	
	No	50%	63%	49%	24%	85%	33%	45%	35%	69%	73%	18%	100%
	Total Count	355	170	37	17	13	12	115	196	131	92	17	177

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	3.26	3.61	2.92	2.76	3.31	3.25	3.42	3.03	3.62	3.76	3.71	3.37
	Median	3	4	3	2	3	3	3	3	3	4	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	58%	55%	54%		54%	58%	62%	59%	54%	59%	47%	61%
	Full package tour	22%	28%	14%		31%	42%	25%	22%	22%	23%	53%	23%
	Individually arranged travel (FIT)	10%	15%	16%		8%		7%	6%	16%	16%		10%
	Group tour	5%	2%	5%	100%			4%	7%	2%	1%		2%
	Company paid travel	4%		11%		8%		2%	4%	4%			3%
	Other	1%	1%						1%	2%	1%		1%
	Total Count	351	170	37	17	13	12	114	194	129	92	17	173

TRAVEL MOTIVATION - SEGMENTATION

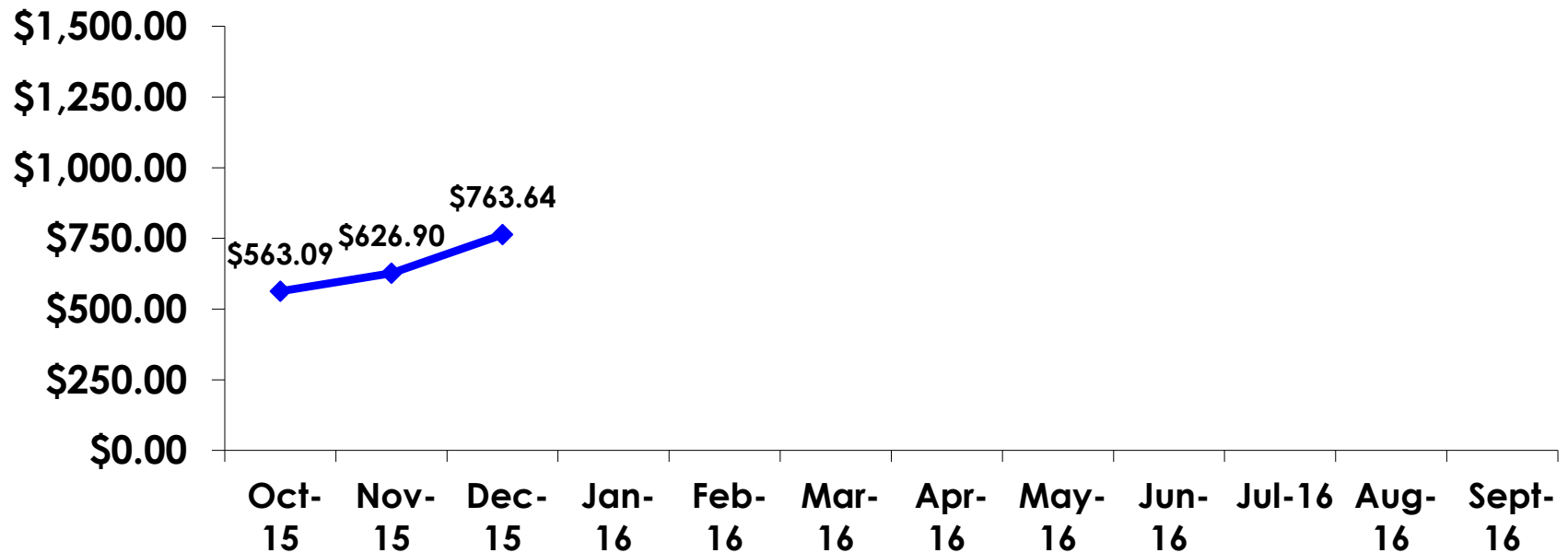
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	42%	55%	43%	18%	62%	25%	39%	28%	63%	64%	18%	85%	
	Price	23%	22%	16%		46%	8%	28%	22%	20%	20%	12%	23%	
	Visit friends/ Relatives	2%	1%	3%			8%	3%	4%	1%	1%		2%	
	Recomm- friend/family/trvl agnt	20%	15%	24%	29%	8%	17%	17%	23%	13%	14%	18%	8%	
	Scuba	4%	3%					9%	5%	1%		6%	2%	
	Water sports	21%	25%	24%	6%	15%	8%	39%	21%	21%	27%	24%	24%	
	Short travel time	57%	66%	43%	12%	69%	42%	65%	52%	64%	71%	47%	61%	
	Golf	4%	4%	5%	6%	15%		9%	3%	4%	4%		5%	
	Relax	35%	38%	27%	6%	38%	8%	41%	32%	37%	39%	35%	37%	
	Company/ Business Trip	10%	1%	8%	35%			9%	13%	7%			7%	
	Company Sponsored	2%	2%					2%	1%	4%	4%		2%	
	Safe	30%	38%	16%	24%	31%	8%	32%	23%	37%	45%	18%	33%	
	Natural beauty	62%	66%	54%	35%	46%	33%	69%	61%	63%	70%	41%	62%	
	Shopping	27%	27%	24%	12%	8%	8%	27%	27%	29%	27%	6%	31%	
	Career Cert/ Testing	1%	2%				8%		1%	1%	1%		1%	
	Married/ Attn wedding	3%	4%	5%					5%	2%	2%	18%	2%	
	Honeymoon	5%	9%				25%	4%	8%	1%	2%	100%	2%	
	Pleasure	49%	51%	43%	18%	62%	25%	53%	48%	50%	55%	41%	52%	
	Organized sports	1%	2%			8%		3%	1%	2%	1%	6%	1%	
	Other	1%	1%	5%				1%	1%	2%	2%		2%	
	Total	Count	355	170	37	17	13	12	116	196	131	92	17	177

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q1	Internet	84%	84%	89%	75%	62%	75%	82%	87%	81%	86%	59%	82%
	Travel Guidebook- Bookstore	52%	54%	43%	38%	38%	67%	57%	55%	50%	55%	71%	45%
	Travel Agent Brochure	40%	41%	27%	44%	38%	50%	47%	44%	34%	40%	65%	37%
	Prior Trip	38%	52%	27%	6%	69%	17%	38%	23%	56%	59%	18%	76%
	Magazine (Consumer)	28%	29%	16%	25%	15%	25%	35%	34%	23%	29%	53%	28%
	Friend/ Relative	23%	13%	24%	25%		50%	21%	30%	14%	11%	35%	13%
	TV	15%	14%	14%	13%	15%	8%	17%	20%	9%	15%	18%	14%
	Consumer Trvl Show	3%	4%	3%	6%		8%	4%	3%	3%	3%	6%	2%
	Co-Worker/ Company Trvl Dept	2%	1%				8%	2%	3%	2%			1%
	Other	1%			13%			1%	2%				1%
	GVB Promo	1%	2%					1%		2%	2%		2%
	Newspaper	1%	1%			15%		1%			1%		1%
	Travel Trade Show	0%							1%				
	Theater Ad	0%						1%	1%				1%
	Radio	0%							1%				
	Total	Count	351	167	37	16	13	12	114	195	128	91	174

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$651.74

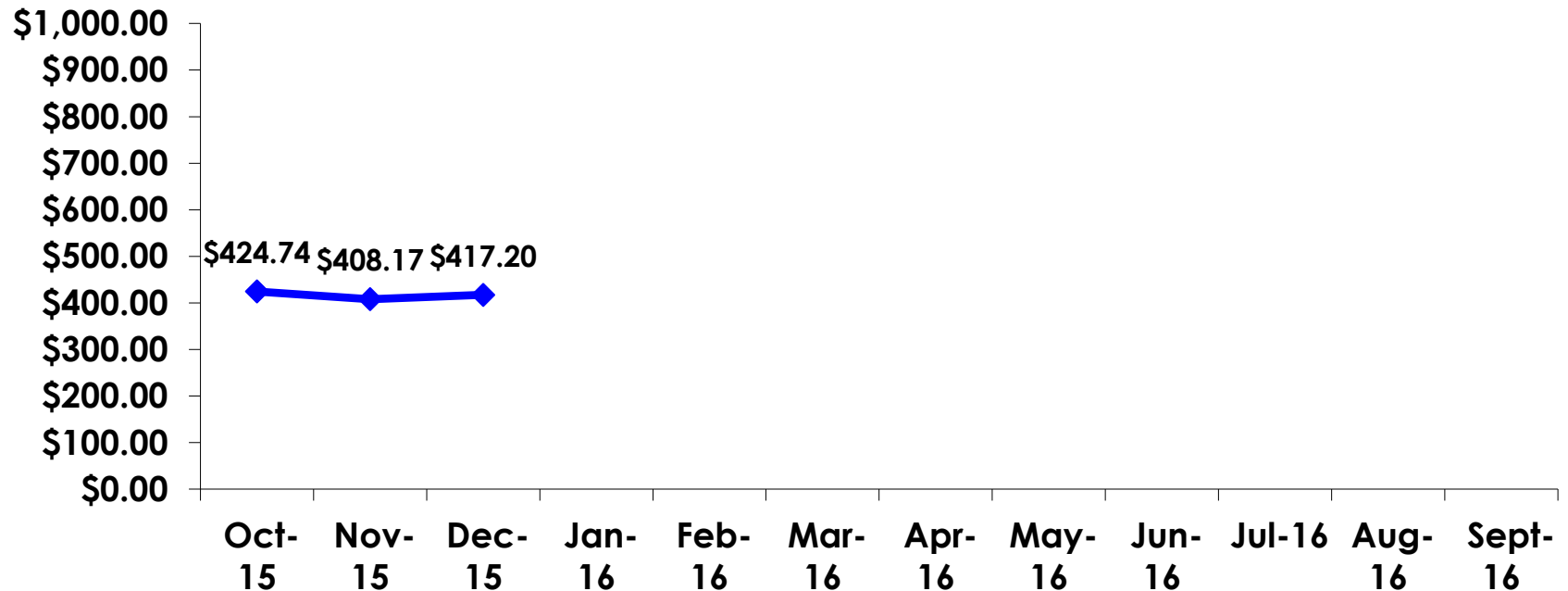
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$763.64	\$943.72	\$624.55	\$479.85	\$696.07	\$1,419.87	\$792.04	\$720.16	\$837.33	\$891.12	\$1,163.12	\$813.03
	Median	\$617	\$752	\$576	\$576	\$576	\$651	\$679	\$576	\$726	\$719	\$1,234	\$617
	Minimum	\$0	\$0	\$0	\$0	\$0	\$526	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,758	\$5,758	\$1,974	\$1,110	\$1,371	\$5,758	\$3,290	\$5,758	\$3,290	\$3,290	\$2,468	\$5,758

PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,742.55	\$2,852.43	\$990.60	\$717.48	\$1,686.13	\$4,119.83	\$1,659.17	\$1,272.21	\$2,720.30	\$3,431.43	\$2,227.09	\$2,234.10
	Median	\$987	\$1,974	\$588	\$576	\$1,316	\$987	\$1,090	\$823	\$2,015	\$2,468	\$2,468	\$1,316
AIR/ HOTEL/ MEAL	Mean	\$3,515.31	\$3,824.64	\$658.00	.	\$2,344.14	\$4,167.35	\$3,489.77	\$2,706.04	\$4,375.72	\$3,927.46	\$3,235.18	\$3,935.36
	Median	\$2,632	\$2,961	\$658	.	\$2,344	\$4,935	\$2,632	\$2,385	\$2,961	\$2,961	\$2,468	\$2,632
AIR ONLY	Mean	\$1,635.38	\$1,716.18	\$2,878.76	.	.	.	\$1,624.44	\$1,431.16	\$1,673.67	\$1,990.31	.	\$1,380.13
	Median	\$1,727	\$1,851	\$2,879	.	.	.	\$1,686	\$1,234	\$1,851	\$1,974	.	\$1,645
HOTEL ONLY	Mean	\$1,090.46	\$1,150.30	.	.	.	.	\$863.63	\$773.15	\$1,143.34	\$1,133.48	.	\$1,046.73
	Median	\$905	\$987	.	.	.	.	\$905	\$773	\$905	\$905	.	\$774
HOTEL & MEAL	Mean	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.
F&B HOTEL	Mean	\$41.13	\$41.13	.	.	.	.	\$41.13	.	\$41.13	\$41.13	.	\$41.13
	Median	\$41	\$41	.	.	.	.	\$41	.	\$41	\$41	.	\$41
TRANS- JAPAN	Mean	\$55.29	\$74.21	\$46.06	\$8.23	\$164.50	\$51.00	\$66.05	\$46.31	\$61.25	\$67.88	\$24.68	\$65.39
	Median	\$41	\$49	\$46	\$8	\$165	\$51	\$41	\$33	\$41	\$41	\$25	\$49
TRANS- GUAM	Mean	\$37.15	\$37.65	.	.	.	.	\$27.97	\$37.01	\$39.01	\$42.77	.	\$39.27
	Median	\$40	\$39	.	.	.	.	\$25	\$41	\$39	\$40	.	\$40
OPT TOURS	Mean	\$256.88	\$307.62	\$252.73	\$57.58	.	\$329.00	\$318.72	\$236.61	\$312.18	\$333.57	.	\$226.42
	Median	\$247	\$329	\$165	\$58	.	\$329	\$288	\$234	\$329	\$329	.	\$165
OTHER	Mean	\$354.66	\$437.47	\$164.50	.	\$329.00	.	\$526.40	\$358.25	\$394.29	\$433.46	\$419.48	\$323.66
	Median	\$329	\$288	\$165	.	\$329	.	\$452	\$329	\$288	\$165	\$419	\$206
TOTAL	Mean	\$1,704.30	\$2,759.12	\$980.85	\$513.72	\$1,565.92	\$4,190.79	\$1,678.73	\$1,233.79	\$2,449.07	\$3,111.73	\$2,326.23	\$2,128.52
	Median	\$987	\$2,097	\$600	\$576	\$1,234	\$1,604	\$1,152	\$699	\$1,916	\$2,468	\$2,468	\$1,234

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$416.71

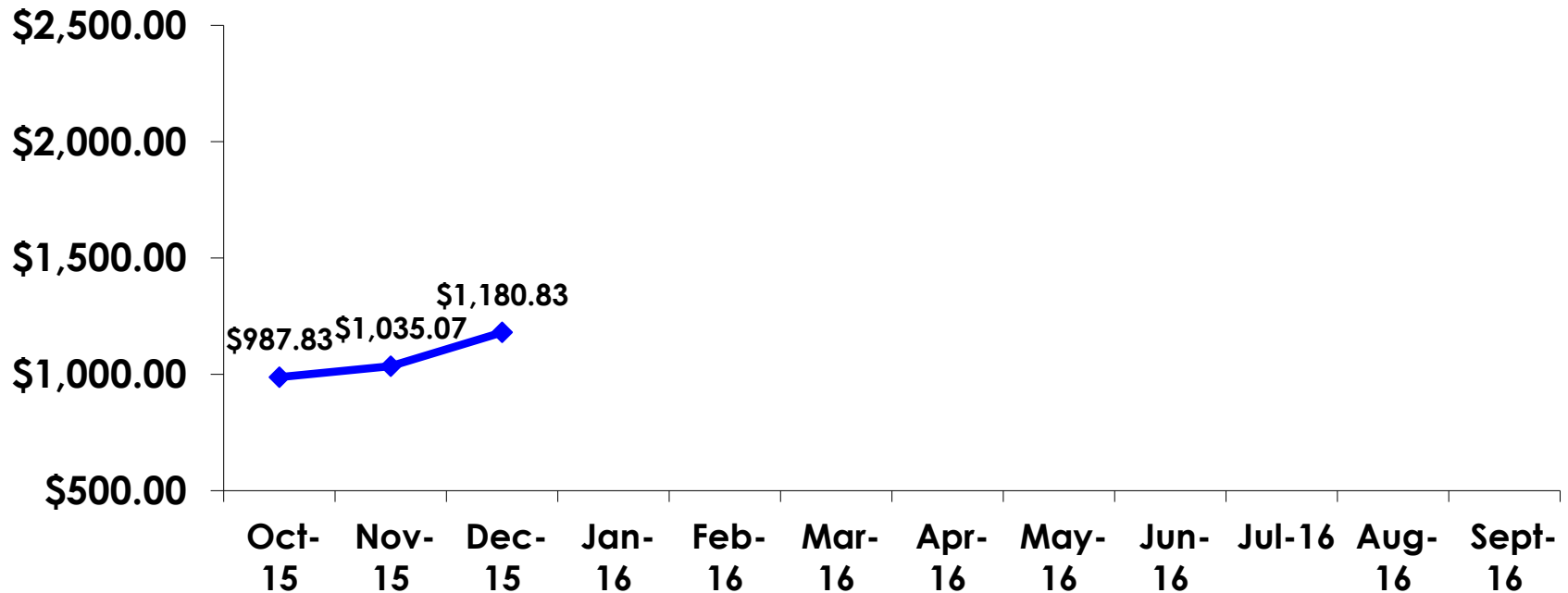
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$417.20	\$371.92	\$344.53	\$316.00	\$435.38	\$380.76	\$446.54	\$406.36	\$415.93	\$343.50	\$470.12	\$435.60
	Median	\$323	\$331	\$249	\$150	\$350	\$450	\$342	\$300	\$333	\$300	\$500	\$333
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$100	\$0
	Maximum	\$3,120	\$1,667	\$1,545	\$1,700	\$1,110	\$800	\$3,120	\$3,120	\$2,100	\$1,667	\$1,055	\$2,100

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	\$41.97	\$75.08	\$24.03	\$3.53	\$38.46	\$70.00	\$32.31	\$20.78	\$74.11	\$67.07	\$79.06	\$46.90
F&B FF/STORE	Mean	\$37.41	\$49.79	\$7.32	\$15.18	\$41.15	\$29.58	\$32.65	\$25.91	\$51.68	\$52.74	\$62.35	\$40.27
F&B RESTRNT	Mean	\$90.42	\$140.21	\$61.73	\$13.24	\$102.31	\$67.50	\$106.75	\$55.57	\$135.95	\$168.47	\$94.71	\$115.34
OPT TOUR	Mean	\$67.63	\$88.34	\$23.11	\$4.71	\$84.62	\$35.00	\$131.14	\$49.83	\$87.84	\$83.04	\$150.29	\$68.70
GIFT- SELF	Mean	\$178.64	\$217.57	\$151.24	\$69.71	\$88.46	\$84.17	\$181.44	\$138.24	\$243.31	\$248.12	\$124.71	\$238.99
GIFT- OTHER	Mean	\$111.34	\$137.54	\$45.05	\$26.47	\$116.15	\$170.00	\$113.48	\$85.82	\$133.87	\$130.62	\$204.41	\$122.44
TRANS	Mean	\$18.99	\$26.09	\$9.27	\$1.41	\$16.00	\$2.08	\$26.54	\$12.14	\$28.50	\$27.41	\$14.41	\$21.64
OTHER	Mean	\$201.65	\$279.94	\$190.00	\$217.06	\$348.23	\$100.42	\$195.32	\$159.74	\$261.40	\$364.04	\$190.29	\$247.08
TOTAL	Mean	\$748.05	\$1,014.55	\$511.76	\$351.29	\$835.38	\$558.75	\$819.63	\$548.04	\$1,016.66	\$1,141.51	\$920.24	\$901.35

TOTAL EXPENDITURES – TRACKING



YTD=\$1,068.45

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	\$1,180.83	\$1,315.64	\$969.07	\$795.85	\$1,131.45	\$1,800.63	\$1,238.58	\$1,126.52	\$1,253.26	\$1,234.62	\$1,633.23	\$1,248.63
	Median	\$1,010	\$1,128	\$840	\$658	\$952	\$1,231	\$1,091	\$917	\$1,102	\$1,061	\$1,766	\$1,049
	Minimum	\$0	\$0	\$0	\$82	\$329	\$526	\$0	\$0	\$0	\$0	\$260	\$0
	Maximum	\$6,158	\$6,158	\$2,039	\$2,276	\$2,344	\$6,158	\$4,354	\$6,158	\$3,882	\$3,882	\$3,523	\$6,158

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 2015, and Overall Oct-Dec 2015				
	Oct-15	Nov-15	Dec-15	Combined Oct-Dec 2015
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	4	4	3	3
Ease of getting around				
Safety walking around at night				
Quality of daytime tours				
Variety of daytime tours	5			
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping		3		
Variety of shopping	2			5
Price of things on Guam				
Quality of hotel accommodations			2	4
Quality/cleanliness of air, sky			4	
Quality/cleanliness of parks				
Quality of landscape in Tumon	1	1	1	1
Quality of landscape in Guam				
Quality of ground handler				
Quality/cleanliness of transportation vehicles	3	2		2
% of Overall Satisfaction Accounted For	65.6%	46.7%	53.1%	48.4%
NOTE: Only significant drivers are included.				

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by four significant factors in the December 2015 Period. By rank order they are:
 - **Quality of landscape in Tumon,**
 - **Quality of hotel accommodations,**
 - **Quality/cleanliness of beaches & parks, and**
 - **Quality/cleanliness of air, sky.**
- With all four factors the overall r^2 is .531 meaning that **53.1% of overall satisfaction is accounted for by these factors.**

Drivers of Per Person On Island Expenditures, Oct, Nov, Dec 2015 and Overall Oct-Dec 2015				
	Oct-15	Nov-15	Dec-15	Combin ed Oct- Dec 2015
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks				
Ease of getting around				
Safety walking around at night		2		
Quality of daytime tours	3			
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping				1
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations	1			
Quality/cleanliness of air, sky				
Quality/cleanliness of parks	2	1		2
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	4.8%	4.8%	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 December 2015 Period.