



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2016 Market Segmentation

JANUARY 2016



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 **353** 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 **353** 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

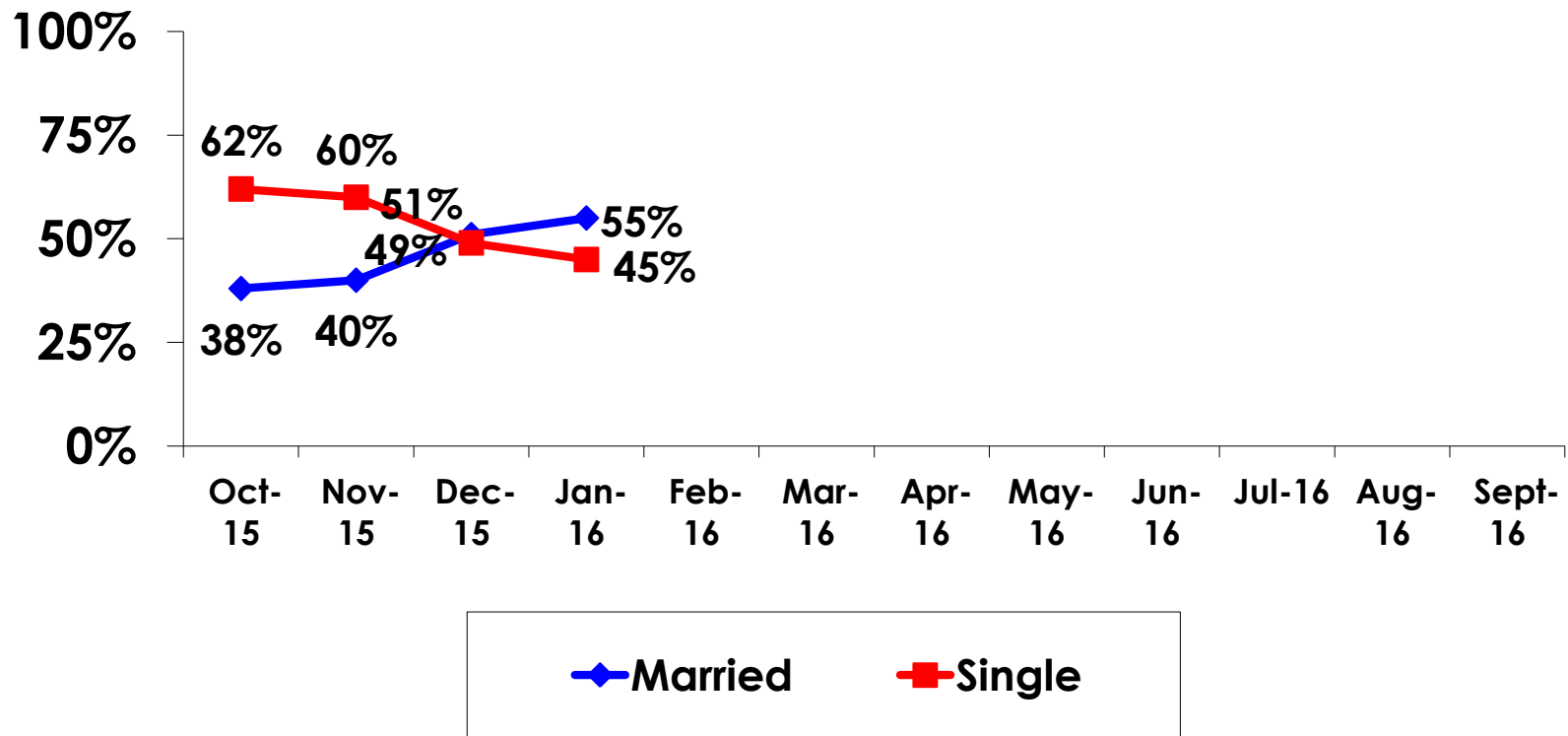
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%	56%								
Office Lady	9%	12%	10%	12%								
Group	5%	7%	5%	1%								
Silver	6%	2%	4%	5%								
Wedding	7%	9%	3%	3%								
Sport	31%	37%	33%	37%								
18-35	73%	66%	55%	49%								
36-55	19%	29%	37%	44%								
Child	6%	14%	26%	35%								
Honey-moon	7%	3%	5%	2%								
Repeat	35%	46%	50%	56%								
TOTAL	351	351	356	353								

SECTION 1 **PROFILE OF RESPONDENTS**

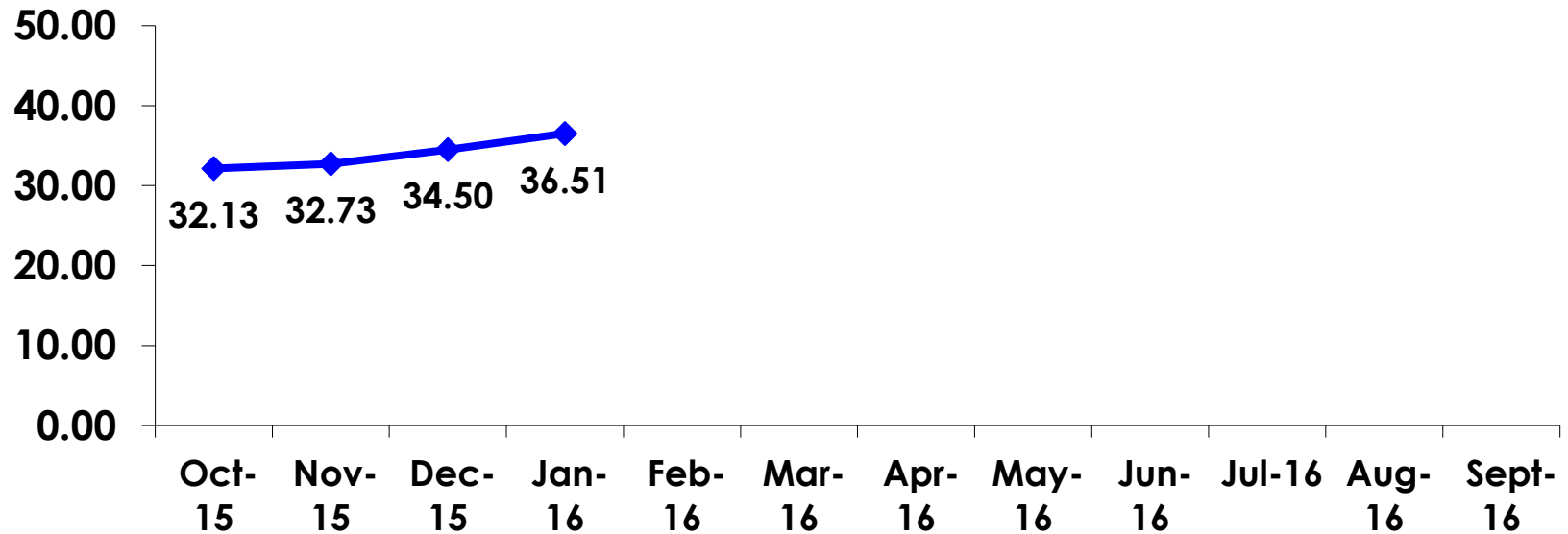
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	55%	91%	26%	100%	94%	100%	43%	25%	83%	95%	88%	67%
	Single	45%	9%	74%		6%		57%	75%	17%	5%	13%	33%
	Total Count	350	197	43	5	17	11	129	169	156	122	8	196

AVERAGE AGE - TRACKING



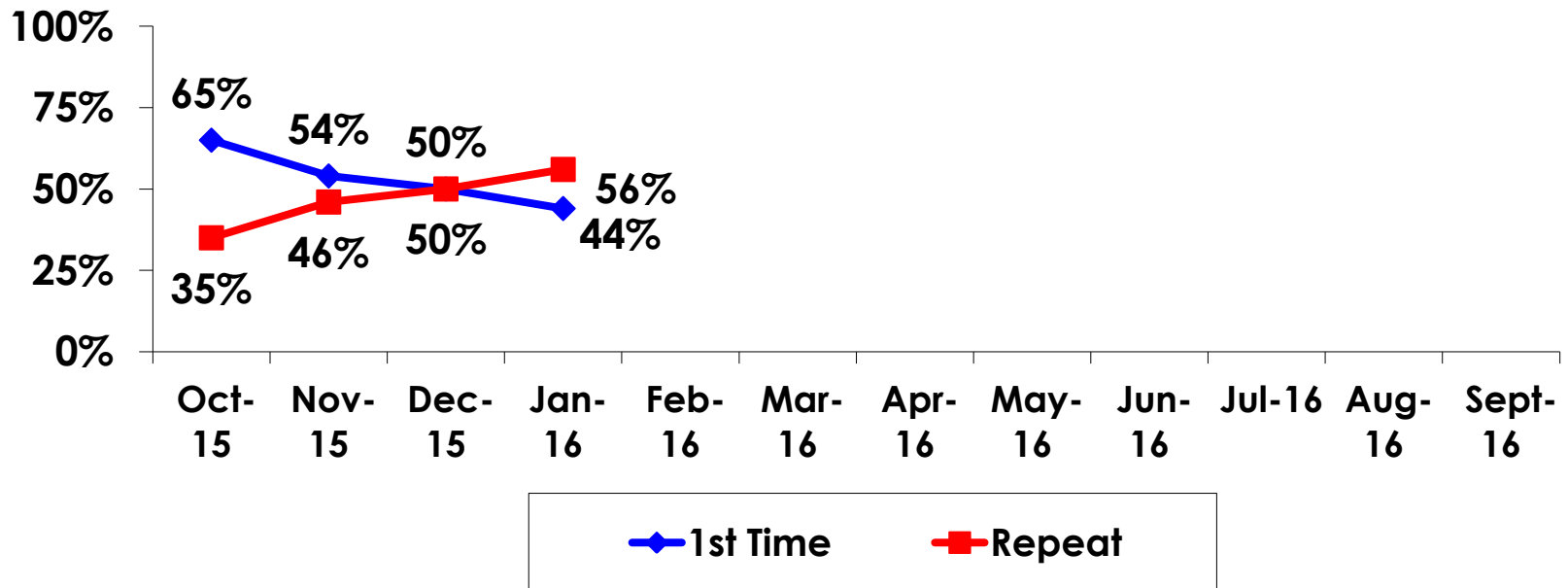
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	22%	4%	14%	20%		9%	28%	44%		2%	13%	10%
	25-34	25%	17%	47%			27%	30%	52%		15%		21%
	35-49	40%	60%	35%	80%		45%	33%	3%	87%	73%	88%	52%
	50+	13%	19%	5%		100%	18%	9%		13%	11%		18%
	Total Count	353	197	43	5	17	11	130	172	156	122	8	198
QF	Mean	36.51	42.54	33.40	39.00	64.71	40.27	33.95	26.19	43.73	42.15	38.25	40.46
	Median	37	42	32	43	64	37	31	26	44	42	38	41

INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q26	<Y2.0 million	4%	2%	6%		13%			4%	2%	1%		3%	
	Y2.0M-Y3.0M	10%	4%	28%	20%			13%	17%	4%	4%	13%	8%	
	Y3.0M-Y4.0M	11%	5%	17%		7%	22%	13%	17%	5%	2%	13%	8%	
	Y4.0M-Y5.0M	13%	11%	11%	20%	13%	11%	13%	14%	13%	10%	25%	14%	
	Y5.0M-Y7.0M	21%	29%	11%	20%	20%	11%	16%	14%	27%	29%	13%	23%	
	Y7.0M-Y10.0M	17%	21%	11%		27%	11%	17%	9%	22%	23%		18%	
	Y10.0M+	23%	29%	17%	40%	20%	44%	24%	18%	26%	32%	38%	23%	
	No Income	3%	1%					4%	6%	1%			3%	
	Total	Count	301	177	36	5	15	9	113	139	140	111	8	175

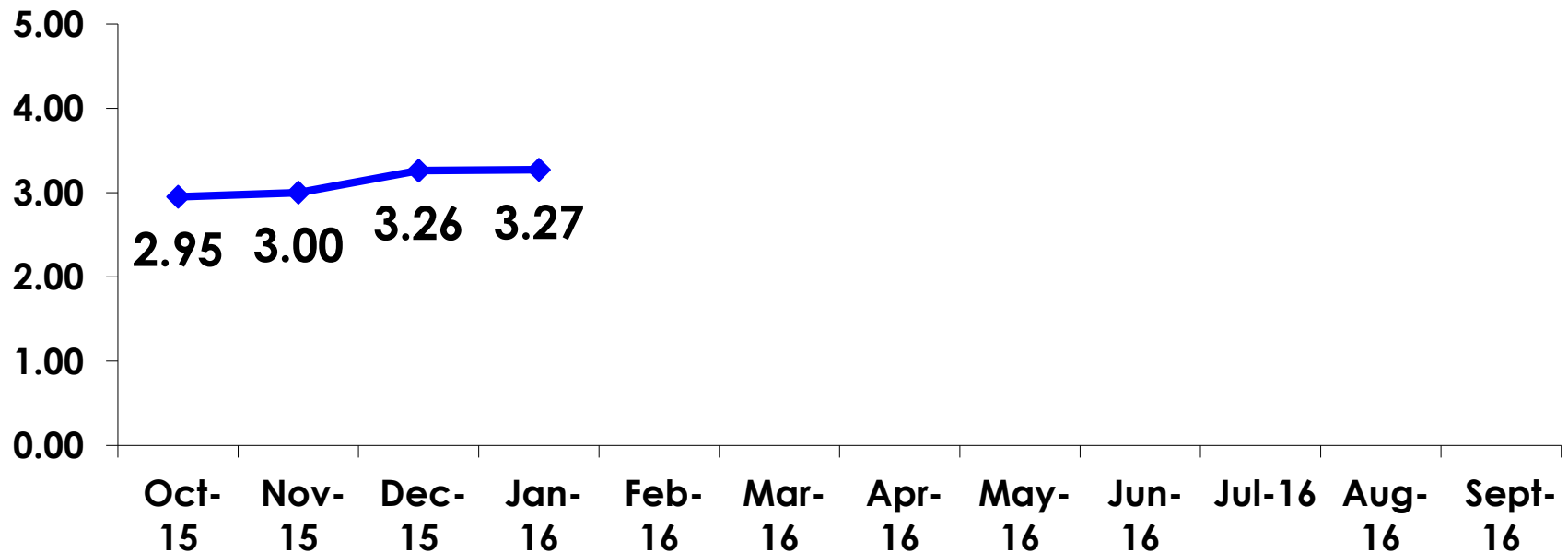
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	44%	29%	42%	80%	29%	64%	49%	62%	27%	29%	50%	
	No	56%	71%	58%	20%	71%	36%	51%	38%	73%	71%	50%	100%
	Total Count	352	196	43	5	17	11	130	172	155	121	8	198

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	3.27	3.53	2.95	2.75	3.59	3.18	3.31	2.98	3.57	3.53	4.00	3.51
	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	60%	50%	67%		53%	27%	65%	69%	51%	45%	63%	55%	
	Individually arranged travel (FIT)	20%	28%	16%		29%	18%	15%	11%	27%	33%	13%	29%	
	Full package tour	17%	18%	14%		12%	45%	17%	18%	16%	17%	25%	14%	
	Company paid travel	1%	2%			6%		1%	1%	2%	2%		1%	
	Group tour	1%	2%	2%	100%		9%	2%	1%	3%	2%		1%	
	Other	1%	1%					1%	1%	1%	1%		1%	
	Total	Count	349	197	43	5	17	11	130	170	154	122	8	197

TRAVEL MOTIVATION - SEGMENTATION

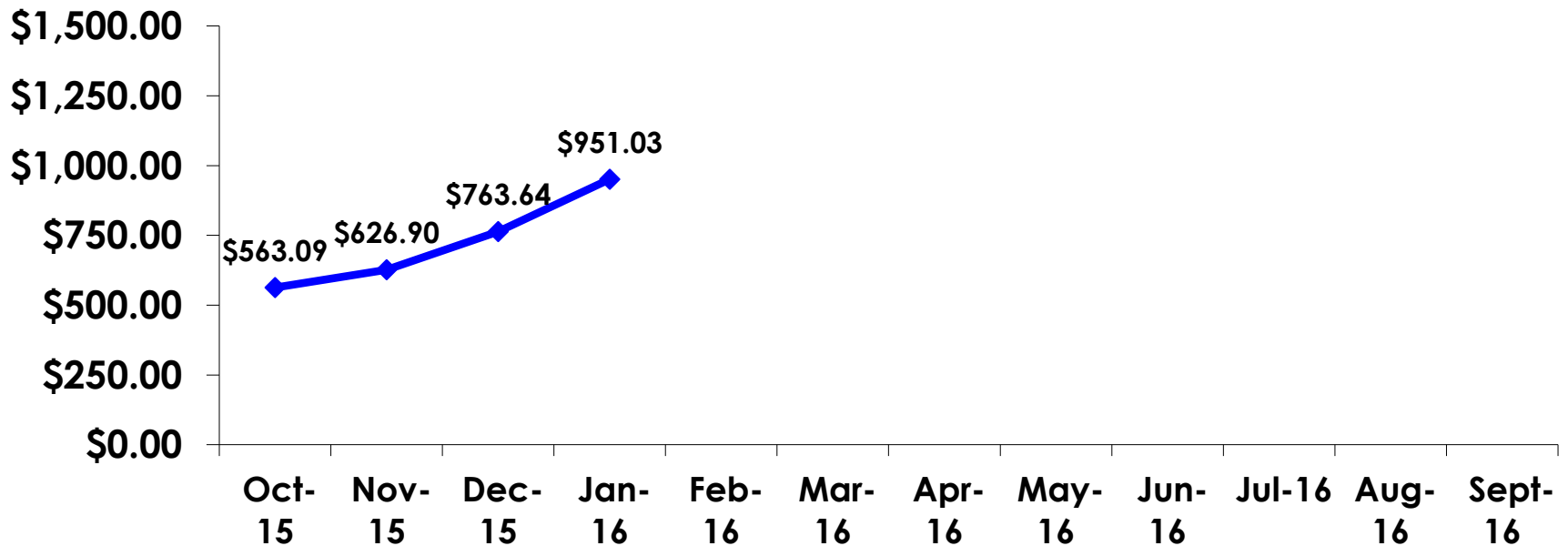
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	46%	61%	44%	20%	71%	27%	43%	31%	59%	64%	38%	82%
	Price	21%	17%	21%		18%		23%	24%	18%	19%		17%
	Visit friends/ Relatives	4%	4%					5%	5%	5%	3%		4%
	Recomm-friend/family/trvl agnt	24%	15%	26%	60%	18%		28%	30%	18%	14%		14%
	Scuba	8%	4%	7%		6%		18%	10%	6%	3%		8%
	Water sports	22%	18%	23%		6%	9%	33%	24%	19%	23%	13%	17%
	Short travel time	61%	63%	53%	40%	76%	18%	65%	56%	66%	65%	38%	67%
	Golf	6%	7%	9%	20%	6%		8%	2%	9%	3%	25%	9%
	Relax	36%	34%	47%	20%	24%		44%	37%	36%	31%	25%	38%
	Company/ Business Trip	4%	4%	2%	80%	6%	9%	1%	1%	6%	3%		3%
	Company Sponsored	0%	1%			6%							
	Safe	33%	35%	28%	20%	35%	9%	36%	27%	38%	32%	25%	34%
	Natural beauty	66%	62%	77%	60%	65%	27%	76%	70%	62%	58%	25%	64%
	Shopping	32%	25%	44%	20%	24%	18%	36%	38%	26%	23%	13%	29%
	Married/ Attn wedding	3%	5%	2%	20%	6%	100%	1%	2%	3%	3%	13%	2%
	Honeymoon	2%	4%	2%			9%	2%	1%	5%	2%	100%	2%
	Pleasure	58%	53%	65%	60%	18%	18%	70%	64%	56%	55%	38%	58%
	Organized sports	3%	2%	2%	20%			2%	1%	4%	2%		4%
	Other	4%	4%	2%		6%		4%	3%	4%	3%	13%	3%
	Total Count	351	195	43	5	17	11	130	172	154	120	8	198

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	82%	77%	95%	80%	47%	64%	88%	88%	79%	78%	86%	77%	
	Travel Guidebook- Bookstore	51%	48%	63%	40%	53%	45%	52%	51%	49%	46%	100%	43%	
	Prior Trip	45%	58%	47%	20%	59%	36%	40%	30%	59%	60%	29%	81%	
	Travel Agent Brochure	37%	30%	35%	60%	47%	27%	38%	41%	32%	28%	71%	26%	
	Magazine (Consumer)	29%	29%	30%		12%	27%	28%	32%	26%	30%	43%	25%	
	Friend/ Relative	26%	16%	30%	40%	6%	9%	29%	35%	19%	19%	14%	17%	
	TV	17%	18%	19%		6%		16%	20%	17%	19%	29%	18%	
	Other	2%	3%			6%		2%	2%	1%	2%		3%	
	Co-Worker/ Company Trvl Dept	1%	1%					2%	1%	3%		14%	1%	
	Consumer Trvl Show	1%						1%	2%					
	Travel Trade Show	0%	1%					1%	1%		1%			
	Theater Ad	0%						1%		1%			1%	
	GVB Promo	0%	1%							1%			1%	
	Total	Count	352	196	43	5	17	11	130	172	155	121	7	197

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$726.62

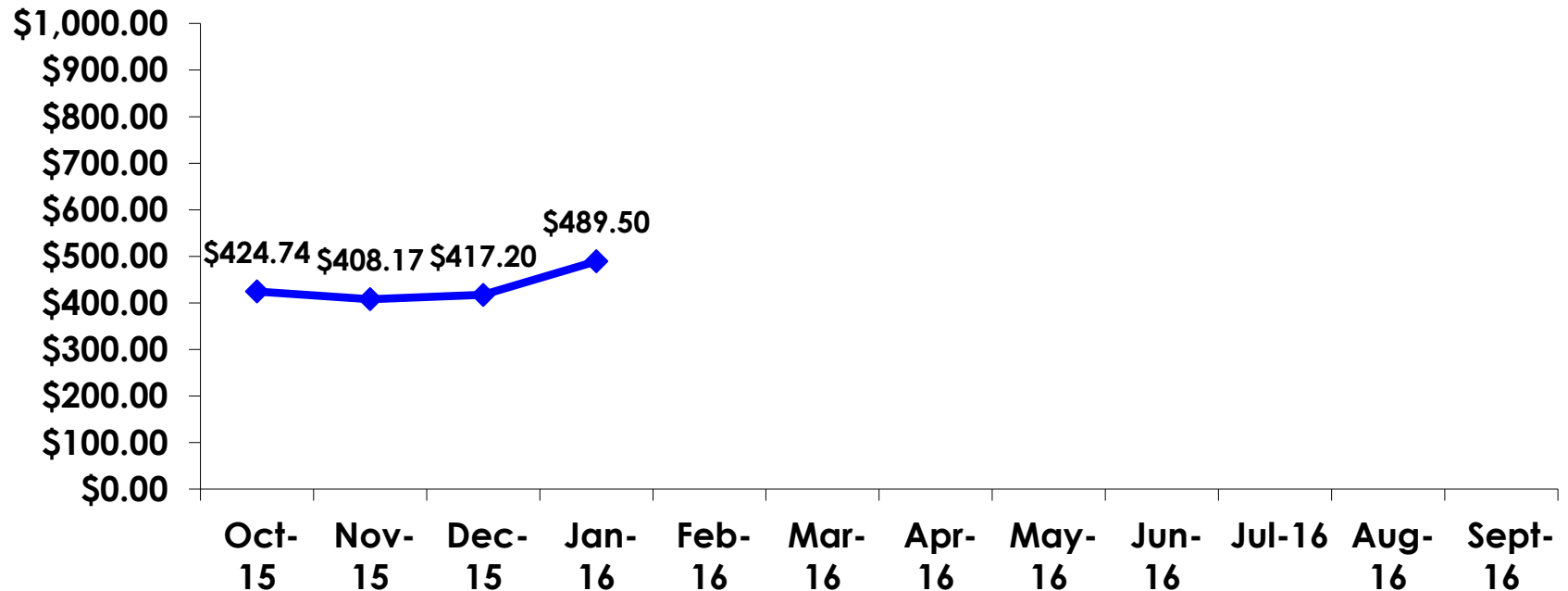
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$951.03	\$1,032.43	\$993.99	\$802.85	\$1,044.62	\$892.55	\$1,033.34	\$830.08	\$1,058.25	\$967.86	\$1,195.51	\$987.11
	Median	\$846	\$987	\$804	\$508	\$931	\$1,058	\$846	\$686	\$904	\$846	\$1,206	\$846
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$423	\$0
	Maximum	\$6,771	\$3,555	\$4,232	\$1,814	\$2,116	\$1,756	\$6,771	\$6,771	\$5,417	\$2,821	\$2,116	\$5,417

PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$2,486.66	\$3,776.47	\$1,608.83	\$7,617.44	\$5,213.71	\$2,840.67	\$2,271.60	\$1,292.29	\$3,749.22	\$4,352.43	\$3,184.51	\$3,191.84
	Median	\$1,523	\$2,878	\$1,354	\$7,617	\$2,539	\$2,328	\$1,100	\$846	\$3,047	\$3,386	\$3,047	\$2,201
AIR/ HOTEL/ MEAL	Mean	\$3,549.56	\$4,153.74	\$5,078.29	\$1,692.76	\$4,231.91	\$1,735.08	\$3,005.96	\$3,077.66	\$3,807.31	\$4,165.50		\$3,920.16
	Median	\$3,369	\$3,386	\$5,078	\$1,693	\$4,232	\$1,735	\$3,132	\$1,460	\$3,377	\$3,386		\$3,377
AIR ONLY	Mean	\$1,610.65	\$2,237.62	\$605.47		\$2,285.23		\$1,362.97	\$870.17	\$1,886.08	\$2,465.09		\$1,763.75
	Median	\$1,143	\$1,650	\$482		\$1,693		\$846	\$597	\$1,270	\$1,862		\$1,185
HOTEL ONLY	Mean	\$842.44	\$1,112.25	\$210.69		\$1,057.98		\$916.40	\$374.33	\$990.80	\$1,408.07		\$921.29
	Median	\$592	\$846	\$237		\$1,058		\$846	\$302	\$846	\$1,185		\$719
HOTEL & MEAL	Mean	\$1,438.85	\$338.55					\$338.55		\$1,438.85	\$338.55		\$1,438.85
	Median	\$1,439	\$339					\$339		\$1,439	\$339		\$1,439
F&B HOTEL	Mean												
	Median												
TRANS- JAPAN	Mean	\$74.97	\$124.48	\$47.96			\$42.32	\$45.46	\$51.30	\$129.68	\$157.64		\$84.03
	Median	\$42	\$85	\$8			\$42	\$25	\$37	\$85	\$106		\$42
TRANS- GUAM	Mean	\$53.20	\$53.60	\$42.32				\$50.78	\$46.55	\$62.07	\$71.94		\$71.94
	Median	\$42	\$42	\$42				\$51	\$42	\$42	\$72		\$72
OPT TOURS	Mean	\$335.06	\$470.18	\$324.16		\$152.35		\$322.55	\$243.35	\$527.17	\$499.37		\$454.33
	Median	\$254	\$339	\$169		\$152		\$233	\$169	\$423	\$381		\$317
OTHER	Mean	\$642.83	\$848.73	\$281.42		\$888.70		\$710.96	\$363.20	\$1,030.28	\$1,079.52		\$792.42
	Median	\$372	\$423	\$131		\$889		\$300	\$169	\$423	\$423		\$381
TOTAL	Mean	\$2,374.42	\$3,415.60	\$1,663.57	\$3,385.53	\$3,957.08	\$2,227.52	\$2,360.26	\$1,337.37	\$3,294.86	\$3,755.09	\$3,184.51	\$2,835.81
	Median	\$1,523	\$2,708	\$1,270	\$1,693	\$2,116	\$2,116	\$1,502	\$846	\$2,588	\$3,250	\$3,047	\$2,116

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$434.92

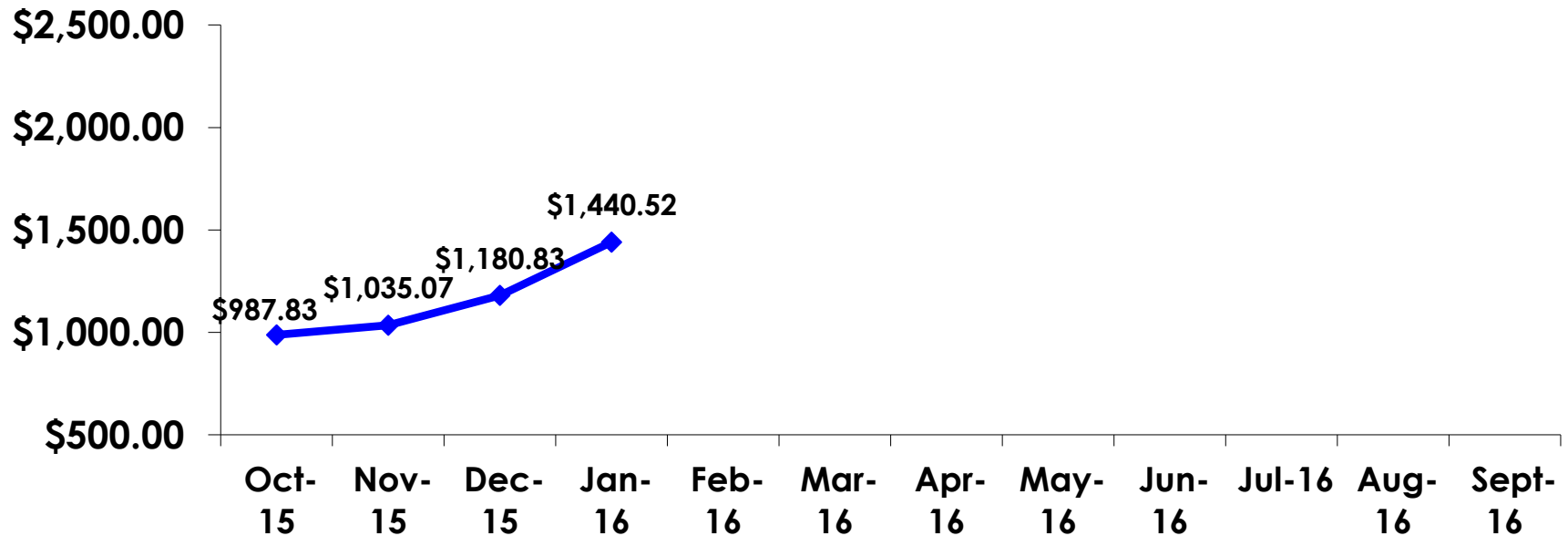
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$489.50	\$492.46	\$519.06	\$244.29	\$535.24	\$790.91	\$506.98	\$473.88	\$488.86	\$466.32	\$498.31	\$512.31
	Median	\$337	\$333	\$400	\$171	\$300	\$400	\$400	\$335	\$342	\$323	\$500	\$343
	Minimum	\$0	\$0	\$0	\$100	\$0	\$100	\$0	\$0	\$0	\$0	\$100	\$0
	Maximum	\$4,667	\$4,667	\$1,570	\$550	\$1,750	\$2,700	\$2,540	\$3,720	\$4,667	\$4,667	\$900	\$4,667

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	\$71.01	\$104.99	\$43.05	\$40.00	\$23.53	\$22.73	\$47.75	\$24.82	\$129.83	\$142.17	\$0.00	\$101.61
F&B FF/STORE	Mean	\$39.85	\$51.83	\$33.37	\$0.00	\$14.71	\$31.82	\$40.57	\$25.30	\$58.69	\$57.74	\$42.88	\$45.14
F&B RESTRNT	Mean	\$113.01	\$166.00	\$98.60	\$30.00	\$199.53	\$304.55	\$121.08	\$64.66	\$156.03	\$156.19	\$131.88	\$142.12
OPT TOUR	Mean	\$106.45	\$125.12	\$105.19	\$90.00	\$97.00	\$81.82	\$158.01	\$80.68	\$129.55	\$125.20	\$154.38	\$101.46
GIFT- SELF	Mean	\$220.50	\$313.23	\$187.91	\$90.00	\$138.35	\$709.09	\$173.80	\$153.77	\$280.99	\$308.93	\$287.50	\$248.81
GIFT- OTHER	Mean	\$129.91	\$152.27	\$87.21	\$80.00	\$214.47	\$181.82	\$103.37	\$105.53	\$138.50	\$140.13	\$181.25	\$135.10
TRANS	Mean	\$34.56	\$52.24	\$20.09	\$0.00	\$33.59	\$31.82	\$50.63	\$14.20	\$56.52	\$61.89	\$20.63	\$52.17
OTHER	Mean	\$373.97	\$527.38	\$220.23	\$340.00	\$597.53	\$418.18	\$348.68	\$235.40	\$505.16	\$648.50	\$471.88	\$526.22
TOTAL	Mean	\$1,088.41	\$1,491.54	\$795.65	\$670.00	\$1,318.71	\$1,781.82	\$1,041.58	\$702.62	\$1,455.27	\$1,638.30	\$1,290.38	\$1,352.63

TOTAL EXPENDITURES – TRACKING



YTD=\$1,161.53

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	\$1,440.52	\$1,524.89	\$1,513.04	\$1,047.14	\$1,579.85	\$1,683.46	\$1,540.33	\$1,303.96	\$1,547.12	\$1,434.19	\$1,693.83	\$1,499.42
	Median	\$1,304	\$1,415	\$1,458	\$608	\$1,339	\$1,483	\$1,365	\$1,181	\$1,356	\$1,315	\$1,638	\$1,312
	Minimum	\$0	\$0	\$400	\$150	\$130	\$250	\$0	\$0	\$0	\$0	\$800	\$0
	Maximum	\$7,488	\$7,488	\$4,232	\$2,243	\$3,443	\$4,393	\$7,451	\$7,451	\$7,488	\$7,488	\$2,866	\$7,488

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, Jan 2016, and Overall Oct-2015 - Jan 2016					
	Oct-15	Nov-15	Dec-15	Jan-16	Combin ed Oct- 2015 - Jan 2016
Drivers:	rank	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				2	6
Variety of daytime tours	5				
Quality of nighttime tours					
Variety of nighttime tours					
Quality of shopping		3			
Variety of shopping	2			5	4
Price of things on Guam				1	
Quality of hotel accommodations			2		5
Quality/cleanliness of air, sky			4		
Quality/cleanliness of parks					
Quality of landscape in Tumon	1	1	1	3	1
Quality of landscape in Guam					
Quality of ground handler					7
Quality/cleanliness of transportation vehicles	3	2		4	2
% of Overall Satisfaction Accounted For	65.6%	46.7%	53.1%	45.9%	47.9%
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 2016 Period. By rank order they are:
 - **Price of things on Guam,**
 - **Quality of daytime tours,**
 - **Quality of landscape in Tumon,**
 - **Quality/cleanliness of transportation vehicles, and**
 - **Variety of shopping.**
- With all four factors the overall r^2 is .459 meaning that **45.9% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2015, Jan 2016 and Overall Oct-2015-Jan 2016					
	Oct-15	Nov-15	Dec-15	Jan-16	Combin ed Oct- 2015- Jan 2016
Drivers:	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks					
Ease of getting around				3	
Safety walking around at night		2			
Quality of daytime tours	3				
Variety of daytime tours					
Quality of nighttime tours					
Variety of nighttime tours				2	2
Quality of shopping				1	1
Variety of shopping					
Price of things on Guam				4	
Quality of hotel accommodations	1				
Quality/cleanliness of air, sky					
Quality/cleanliness of parks	2	1			
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%	12.8%	2.5%
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 four significant factors in the January 2016 Period. By rank order they are:
 - **Quality of shopping,**
 - **Variety of nighttime tours,**
 - **Ease of getting around, and**
 - **Price of things on Guam.**
- With all four factors the overall r^2 is .128 meaning that **12.8% of overall satisfaction is accounted for by these factors.**