



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2016 Market Segmentation

NOVEMBER 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 **351** 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 **351** 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

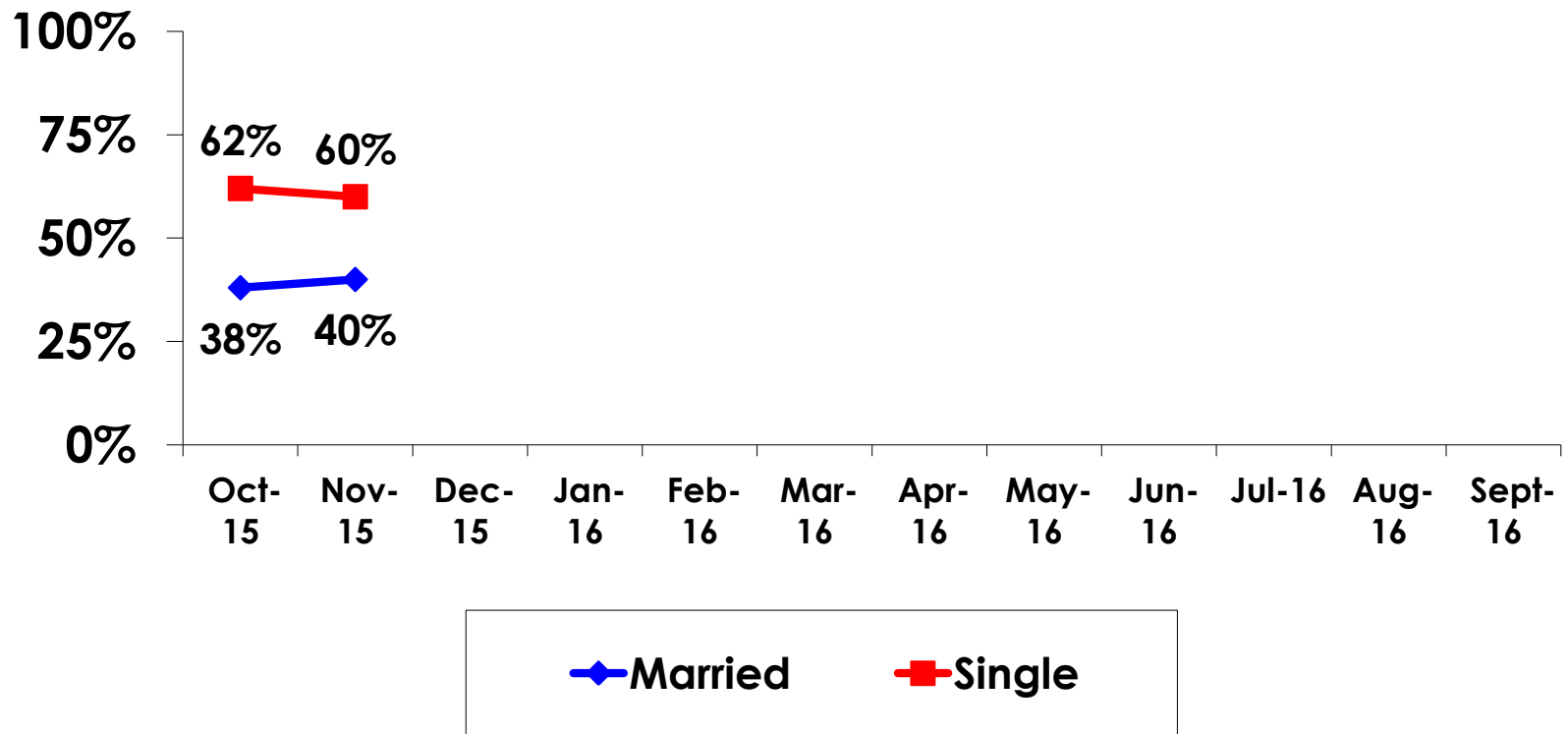
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%										
Office Lady	9%	12%										
Group	5%	7%										
Silver	6%	2%										
Wedding	7%	9%										
Sport	31%	37%										
18-35	73%	66%										
36-55	19%	29%										
Child	6%	14%										
Honey-moon	7%	3%										
Repeat	35%	46%										
TOTAL	351	351										

SECTION 1 **PROFILE OF RESPONDENTS**

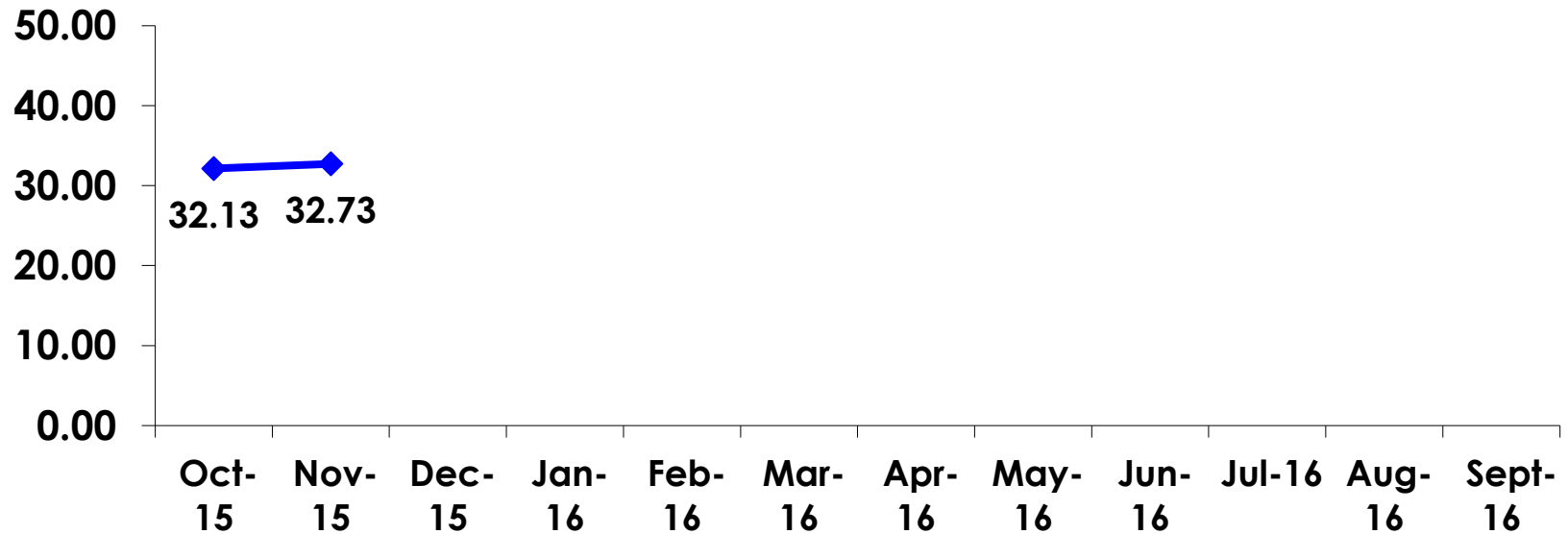
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	40%	83%	7%	26%	100%	70%	34%	20%	74%	88%	100%	49%
	Single	60%	17%	93%	74%		30%	66%	80%	26%	12%		51%
	Total Count	350	126	42	23	8	33	129	230	102	49	11	160

AVERAGE AGE - TRACKING



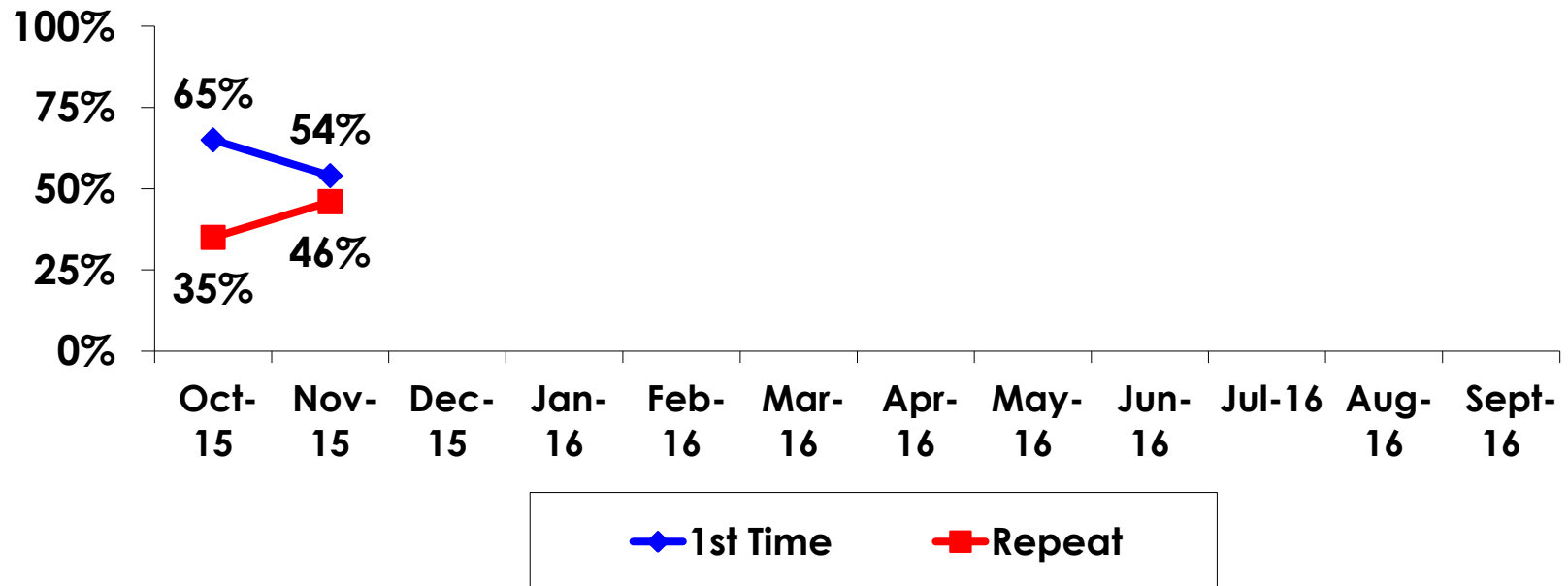
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	31%	2%	36%	43%		6%	38%	47%				19%
	25-34	33%	32%	45%	39%		55%	30%	50%		24%	64%	33%
	35-49	24%	45%	14%	9%		21%	23%	3%	76%	69%	36%	31%
	50+	11%	20%	5%	9%	100%	18%	9%		24%	6%		17%
	Total Count	348	124	42	23	8	33	127	230	102	49	11	159
QF	Mean	32.73	39.86	29.05	29.65	64.63	35.64	31.54	25.63	44.29	39.41	30.82	36.33
	Median	29	40	27	26	63	30	26	25	44	40	28	33

INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	8%	3%	3%		17%	3%	11%	9%	5%	2%		6%
	Y2.0M-Y3.0M	11%	7%	31%	10%		13%	15%	14%	5%	6%		9%
	Y3.0M-Y4.0M	18%	11%	43%	40%	17%	29%	9%	23%	10%	11%		17%
	Y4.0M-Y5.0M	14%	13%	11%	30%	17%	16%	13%	17%	9%	11%	33%	13%
	Y5.0M-Y7.0M	17%	25%	3%		17%	16%	17%	12%	29%	23%	22%	18%
	Y7.0M-Y10.0M	14%	21%		5%		16%	12%	12%	20%	28%	22%	19%
	Y10.0M+	13%	17%	9%	10%	33%	6%	16%	7%	20%	19%	22%	16%
	No Income	4%	3%		5%			8%	6%	1%			3%
	Total Count	299	114	35	20	6	31	115	191	93	47	9	139

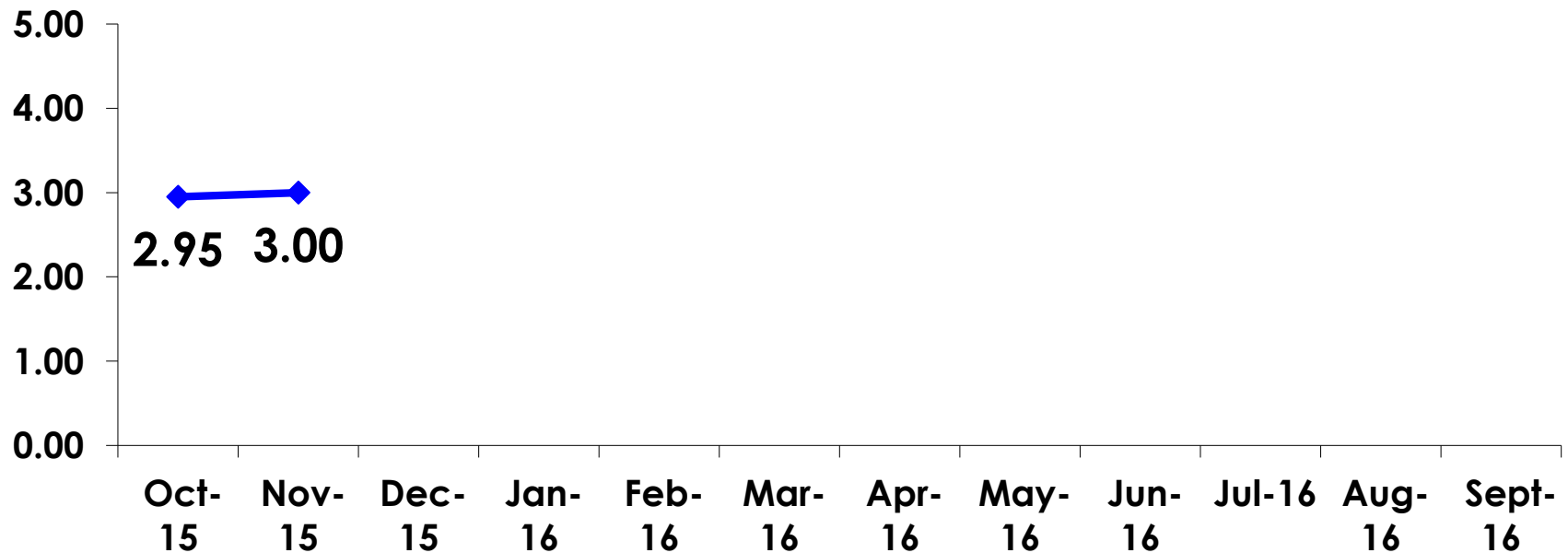
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	54%	46%	53%	50%	38%	67%	61%	63%	37%	40%	91%	
	No	46%	54%	47%	50%	63%	33%	39%	37%	63%	60%	9%	100%
	Total Count	349	125	43	24	8	33	128	229	101	48	11	160

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	3.00	3.13	3.02	2.92	3.25	3.18	2.96	2.96	3.05	3.04	3.55	2.96
	Median	3	3	3	3	3	3	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	59%	57%	50%		38%	58%	61%	60%	61%	58%	36%	56%	
	Full package tour	22%	30%	12%		25%	36%	20%	22%	22%	25%	55%	22%	
	Individually arranged travel (FIT)	8%	10%	7%		13%	6%	9%	6%	10%	13%	9%	9%	
	Group tour	7%	2%	21%	100%	13%		7%	8%	3%	2%		8%	
	Company paid travel	3%	1%	10%		13%		1%	4%	2%			5%	
	Other	1%	1%					2%	0%	2%	2%		1%	
	Total	Count	348	125	42	24	8	33	127	228	101	48	11	160

TRAVEL MOTIVATION - SEGMENTATION

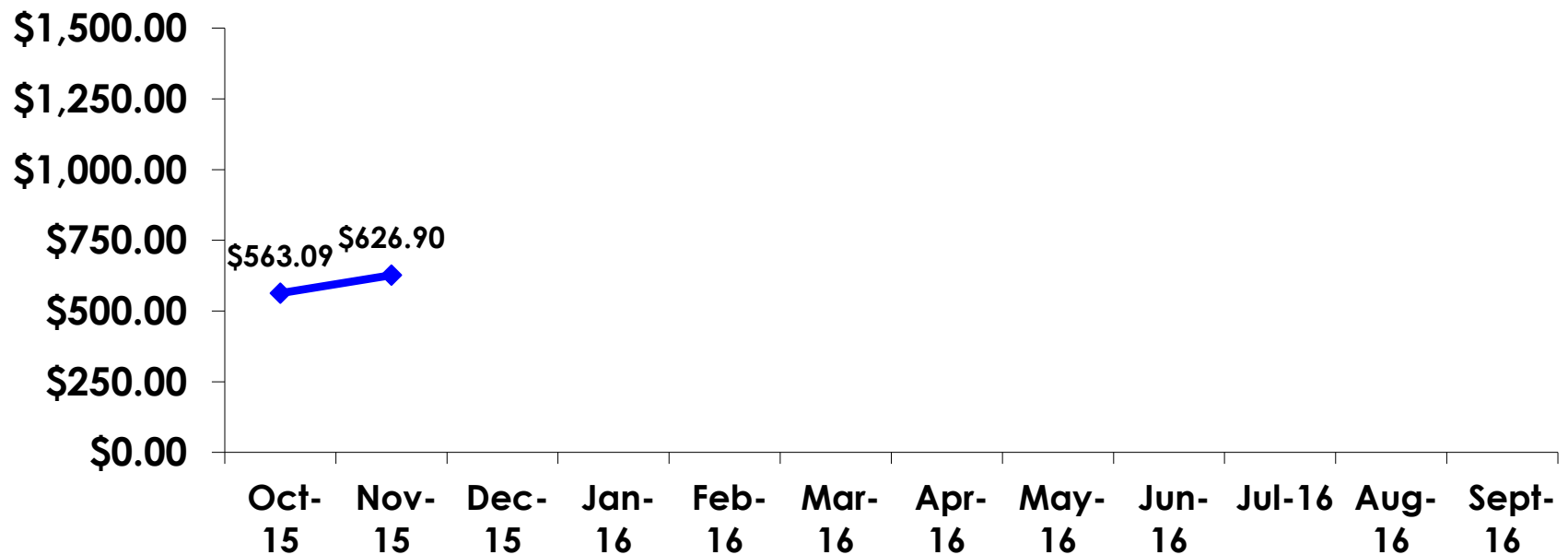
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	33%	40%	37%	29%	38%	27%	30%	26%	50%	55%		73%	
	Price	20%	20%	16%	8%	13%	9%	21%	23%	15%	16%	18%	18%	
	Visit friends/ Relatives	3%	2%			13%	3%	2%	3%	3%			4%	
	Recomm- friend/family/trvl agnt	20%	12%	23%	21%		3%	23%	26%	11%	16%	9%	14%	
	Scuba	8%	6%	14%	4%		3%	20%	8%	10%		9%	6%	
	Water sports	21%	21%	16%			6%	32%	23%	21%	24%	45%	18%	
	Short travel time	47%	48%	33%	13%	25%	9%	55%	49%	43%	61%	45%	44%	
	Golf	4%	4%	2%	8%	38%		6%	1%	6%	2%		6%	
	Relax	25%	26%	21%	4%	13%	12%	31%	28%	22%	29%		28%	
	Company/ Business Trip	12%	2%	30%	71%	13%		9%	13%	8%	2%		13%	
	Company Sponsored	2%	1%	5%	4%			2%	1%	3%			1%	
	Safe	20%	20%	23%	8%	38%	6%	23%	20%	19%	22%	9%	23%	
	Natural beauty	53%	47%	42%	13%	38%	9%	63%	59%	43%	51%	55%	47%	
	Shopping	24%	17%	26%	8%	25%	6%	30%	27%	18%	12%	9%	21%	
	Married/ Attn wedding	9%	17%	7%			100%	4%	9%	12%	10%	9%	7%	
	Honeymoon	3%	9%				3%	3%	3%	3%		100%	1%	
	Pleasure	42%	39%	37%	13%	25%	6%	50%	45%	36%	51%	18%	39%	
	Organized sports	1%	2%					1%	1%	2%	2%		3%	
	Other	5%	9%	2%		25%		1%	3%	7%	6%		5%	
	Total	Count	350	126	43	24	8	33	128	229	102	49	11	160

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q1	Internet	80%	84%	81%	79%	38%	82%	80%	83%	77%	88%	73%	76%
	Travel Guidebook- Bookstore	47%	58%	40%	38%	63%	48%	51%	50%	43%	56%	45%	36%
	Travel Agent Brochure	37%	41%	37%	21%	13%	58%	45%	38%	38%	38%	45%	29%
	Prior Trip	34%	42%	35%	33%	50%	24%	29%	29%	47%	46%		75%
	Friend/ Relative	31%	24%	37%	33%	25%	45%	38%	33%	29%	25%	18%	20%
	Magazine (Consumer)	29%	26%	40%	13%	13%	36%	34%	31%	29%	31%	18%	25%
	TV	10%	11%	9%			9%	9%	11%	10%	10%	18%	5%
	Co-Worker/ Company Trvl Dept	6%	3%	23%	13%		6%	3%	8%	2%	6%	9%	4%
	Other	2%		2%	4%		3%		2%	1%			2%
	Consumer Trvl Show	2%	2%	2%	4%		3%	1%	2%	2%	4%		1%
	GVB Office	1%	2%					2%	2%	1%		9%	
	Newspaper	1%	2%		4%	13%	3%	2%	1%	1%	2%		1%
	GVB Promo	0%						1%	0%				
	Total Count	348	125	43	24	8	33	128	228	101	48	11	159

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$595.00

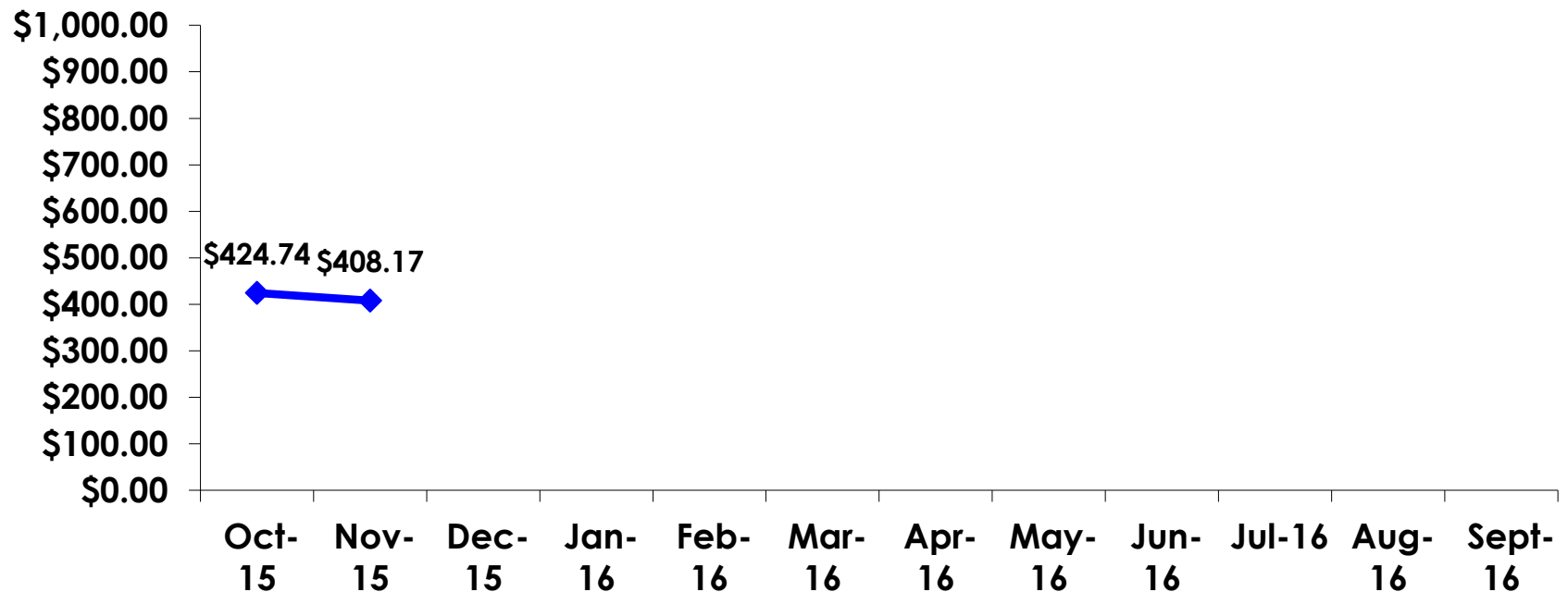
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$626.90	\$711.21	\$555.41	\$424.66	\$443.27	\$871.57	\$666.70	\$591.51	\$735.87	\$665.83	\$701.63	\$601.11
	Median	\$570	\$611	\$570	\$448	\$409	\$896	\$611	\$570	\$653	\$611	\$570	\$570
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,257	\$3,257	\$1,873	\$1,303	\$1,221	\$3,257	\$2,748	\$2,748	\$3,257	\$1,629	\$2,280	\$2,748

PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,165.44	\$2,061.97	\$841.20	\$607.00	\$1,357.11	\$3,466.12	\$1,112.66	\$974.46	\$1,628.83	\$2,197.86	\$1,628.53	\$1,203.05
	Median	\$806	\$1,466	\$733	\$570	\$1,059	\$1,855	\$651	\$586	\$1,221	\$1,710	\$1,588	\$814
AIR/ HOTEL/ MEAL	Mean	\$2,322.94	\$3,692.84	\$956.76	\$542.84	\$6,269.85	\$5,883.07	\$1,591.38	\$1,367.48	\$3,429.94	\$3,322.21	\$3,012.78	\$1,830.39
	Median	\$1,466	\$2,769	\$957	\$611	\$6,270	\$3,257	\$1,315	\$977	\$2,443	\$2,769	\$3,013	\$1,396
AIR ONLY	Mean	\$1,289.85	\$1,570.18	\$1,278.40	\$1,139.97	\$960.83	\$529.27	\$1,375.09	\$1,327.25	\$1,374.07	\$1,628.53		\$2,249.82
	Median	\$969	\$1,445	\$1,278	\$1,140	\$961	\$529	\$1,282	\$529	\$1,291	\$1,445		\$1,629
HOTEL ONLY	Mean	\$525.68	\$714.93	\$398.99	\$325.71	\$260.57	\$293.14	\$742.34	\$360.31	\$747.50	\$793.91		\$507.61
	Median	\$464	\$570	\$399	\$326	\$261	\$293	\$692	\$411	\$733	\$692		\$529
HOTEL & MEAL	Mean	\$1,872.81	\$407.13					\$244.28	\$3,501.34	\$244.28	\$407.13		\$2,469.94
	Median	\$1,669	\$407					\$244	\$3,501	\$244	\$407		\$2,931
F&B HOTEL	Mean	\$57.00	\$57.00					\$57.00		\$57.00	\$57.00		\$57.00
	Median	\$57	\$57					\$57		\$57	\$57		\$57
TRANS- JAPAN	Mean	\$168.22	\$350.62	\$40.71	\$81.43	\$8.14	\$38.54	\$155.32	\$46.78	\$348.61	\$1,028.01	\$569.99	\$185.22
	Median	\$41	\$41	\$41	\$81	\$8	\$41	\$41	\$37	\$81	\$814	\$570	\$24
TRANS- GUAM	Mean	\$41.53	\$24.43	\$122.14				\$24.43	\$45.80	\$24.43		\$24.43	\$24.43
	Median	\$24	\$24	\$122				\$24	\$24	\$24		\$24	\$24
OPT TOURS	Mean	\$194.28	\$269.87	\$209.20	\$183.21		\$122.14	\$204.80	\$170.13	\$323.90	\$167.74	\$472.27	\$169.64
	Median	\$163	\$244	\$244	\$142		\$122	\$163	\$122	\$326	\$122	\$472	\$142
OTHER	Mean	\$811.23	\$1,789.89	\$142.54	\$81.43		\$4,926.31	\$1,002.56	\$822.54	\$867.19	\$861.09	\$4,071.33	\$1,007.56
	Median	\$155	\$501	\$102	\$81		\$4,926	\$110	\$155	\$407	\$704	\$4,071	\$155
TOTAL	Mean	\$1,250.27	\$2,173.00	\$672.44	\$491.95	\$1,446.34	\$3,039.43	\$1,245.73	\$994.70	\$1,832.82	\$2,377.16	\$1,650.00	\$1,313.37
	Median	\$765	\$1,506	\$570	\$448	\$818	\$1,221	\$814	\$631	\$1,262	\$1,791	\$1,140	\$814

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$416.46

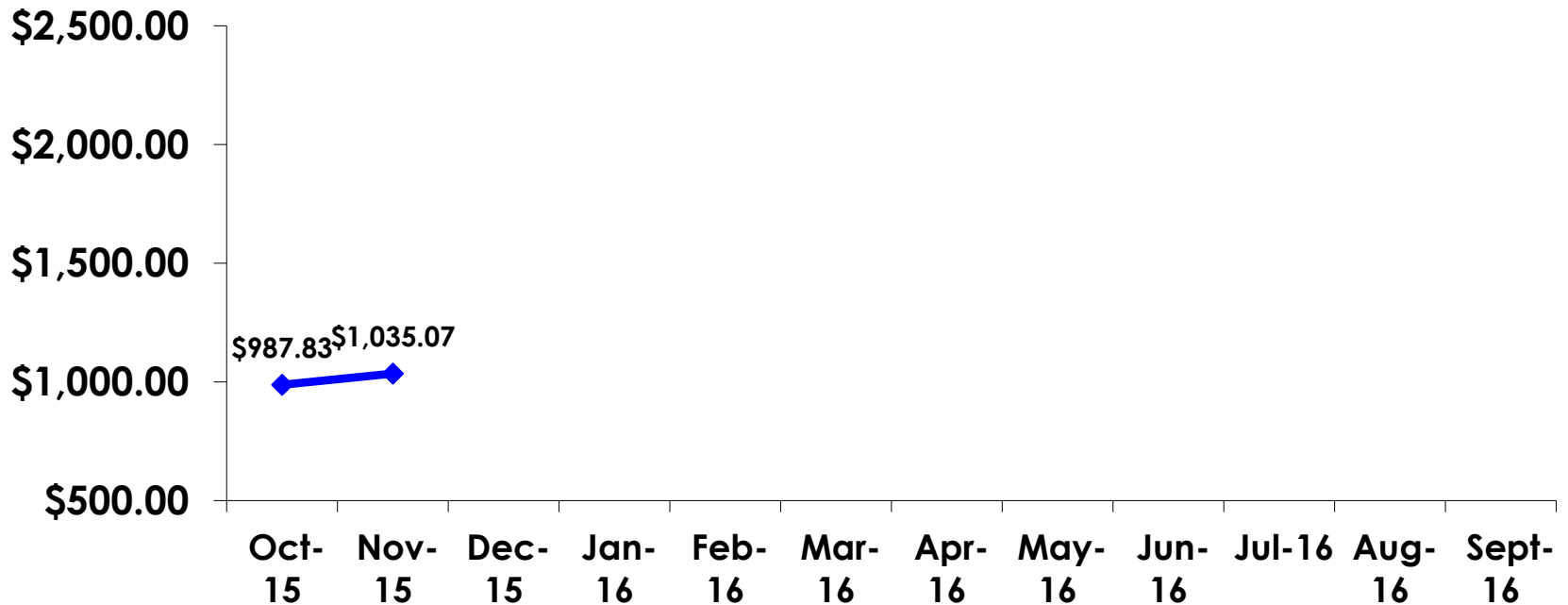
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$408.17	\$360.57	\$448.40	\$359.53	\$567.00	\$377.26	\$479.24	\$406.02	\$403.91	\$278.62	\$499.65	\$386.53
	Median	\$333	\$300	\$488	\$300	\$458	\$300	\$400	\$338	\$300	\$250	\$400	\$333
	Minimum	\$0	\$0	\$0	\$0	\$100	\$67	\$0	\$0	\$0	\$0	\$143	\$0
	Maximum	\$2,500	\$2,500	\$1,000	\$2,300	\$1,350	\$1,150	\$2,300	\$2,000	\$2,500	\$697	\$1,224	\$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	\$29.80	\$53.10	\$3.77	\$8.33	\$57.50	\$43.85	\$30.78	\$14.59	\$59.17	\$76.02	\$19.09	\$37.22
F&B FF/STORE	Mean	\$27.13	\$42.61	\$18.70	\$6.67	\$37.50	\$28.58	\$23.47	\$23.07	\$36.40	\$67.43	\$5.18	\$32.14
F&B RESTRNT	Mean	\$78.97	\$123.85	\$59.84	\$22.92	\$142.50	\$109.39	\$103.91	\$53.52	\$125.49	\$163.88	\$55.00	\$82.08
OPT TOUR	Mean	\$49.21	\$59.16	\$32.79	\$10.42	\$82.50	\$38.33	\$69.70	\$39.03	\$74.88	\$54.08	\$68.18	\$52.58
GIFT- SELF	Mean	\$160.26	\$254.54	\$116.05	\$39.17	\$151.25	\$415.15	\$240.18	\$160.39	\$144.31	\$433.37	\$68.18	\$139.19
GIFT- OTHER	Mean	\$82.79	\$108.37	\$75.79	\$27.50	\$362.50	\$84.09	\$91.60	\$63.36	\$96.52	\$103.27	\$84.55	\$104.47
TRANS	Mean	\$14.15	\$18.70	\$4.19	\$2.92	\$44.00	\$16.82	\$16.06	\$12.23	\$16.03	\$22.65	\$7.82	\$19.21
OTHER	Mean	\$188.18	\$246.37	\$190.77	\$255.50	\$62.50	\$180.12	\$165.69	\$180.70	\$215.60	\$172.86	\$751.91	\$183.23
TOTAL	Mean	\$630.49	\$906.69	\$501.88	\$373.42	\$940.25	\$916.33	\$741.39	\$546.90	\$768.40	\$1,093.55	\$1,059.91	\$650.10

TOTAL EXPENDITURES – TRACKING



YTD=\$1,011.45

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	\$987.83	\$1,152.91	\$1,064.00	\$565.07	\$942.23	\$1,256.50	\$1,123.57	\$962.32	\$1,063.08	\$1,005.78	\$1,404.22	\$1,011.30
	Median	\$916	\$1,024	\$879	\$480	\$956	\$1,081	\$1,001	\$902	\$952	\$915	\$1,381	\$956
	Minimum	\$0	\$0	\$0	\$144	\$144	\$0	\$0	\$0	\$0	\$50	\$0	\$0
	Maximum	\$4,623	\$4,623	\$4,162	\$1,636	\$1,636	\$4,623	\$4,623	\$4,162	\$4,623	\$2,047	\$3,009	\$3,646

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 2015, and Overall Oct-Nov 2015			
	Oct-15 rank	Nov-15 rank	Combin ed Oct- Nov 2015 rank
Drivers:			
Quality & Cleanliness of beaches & parks	4	4	4
Ease of getting around			
Safety walking around at night			
Quality of daytime tours			
Variety of daytime tours	5		5
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping		3	
Variety of shopping	2		3
Price of things on Guam			
Quality of hotel accommodations			
Quality/cleanliness of air, sky			
Quality/cleanliness of parks			
Quality of landscape in Tumon	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%	48.1%
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 November 2015 Period. By rank order they are:
 - **Quality of landscape in Tumon,**
 - **Quality/cleanliness of transportation vehicles,**
 - **Quality of shopping, and**
 - **Quality & cleanliness of beaches & parks.**
- With all four factors the overall r^2 is .467 meaning that **46.7% of overall satisfaction is accounted for by these factors.**

Drivers of Per Person On Island Expenditures, Oct, Nov 2015 and Overall Oct-Nov 2015			
	Oct-15 rank	Nov-15 rank	Combin ed Oct- Nov 2015 rank
Drivers:			
Quality & Cleanliness of beaches & parks			
Ease of getting around			
Safety walking around at night		2	1
Quality of daytime tours	3		
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping			3
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%	3.8%

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 two significant factors in the November 2015 Period. By rank order they are:
 - **Quality/cleanliness of parks, and**
 - **Safety walking around at night.**
- With these factors the overall r^2 is .048 meaning that **4.8% of per person on island expenditure is accounted for by these factors.**