



# **GUAM VISITORS BUREAU**

## **Japan Visitor Tracker Exit Profile**

### **FY2014 Market Segmentation**

#### **APRIL 2014**



**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 **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.

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# 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.

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# Highlighted Segments Parameters

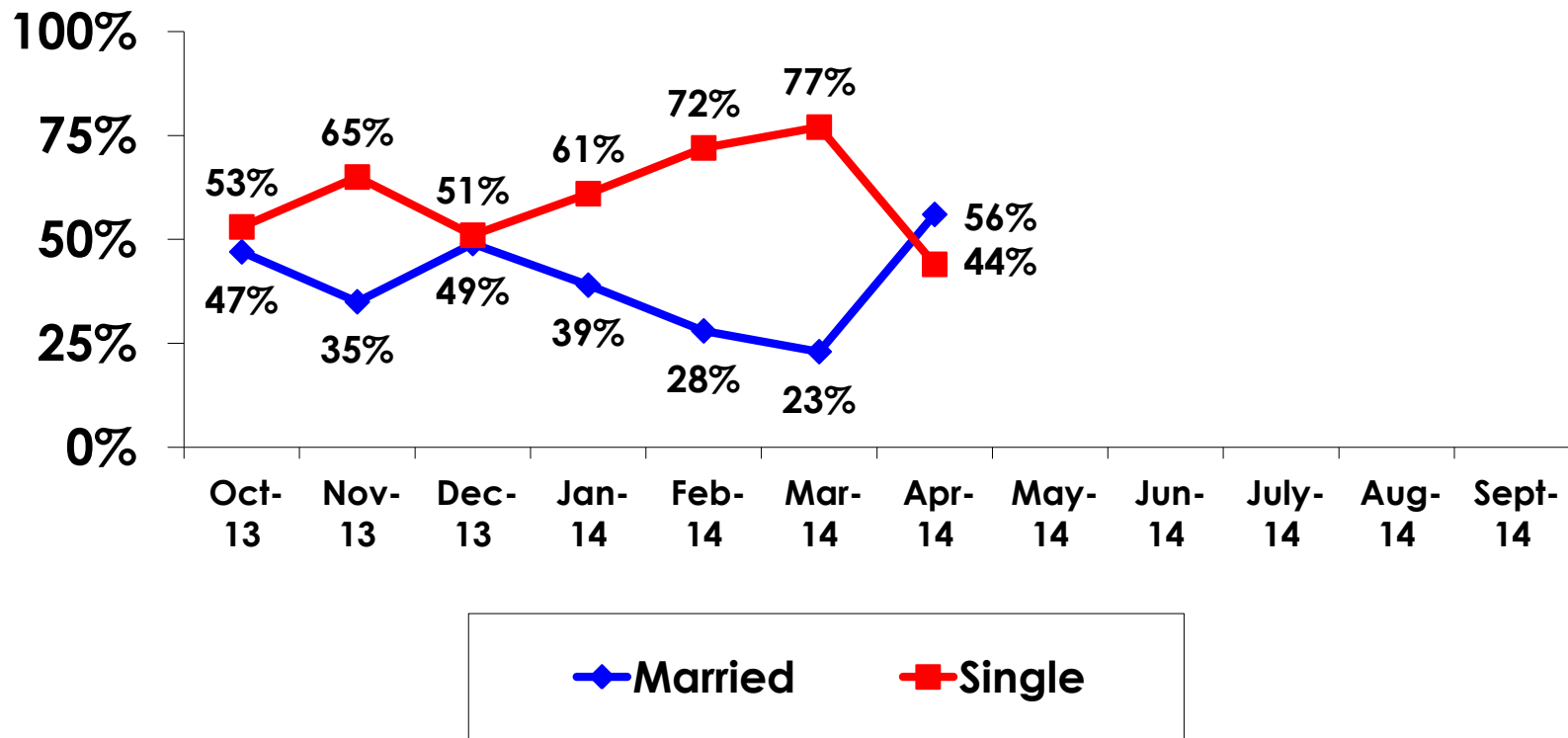
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

# 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
<b>Families</b>	39%	30%	45%	36%	25%	24%	52%					
<b>Office Lady</b>	13%	12%	10%	15%	6%	5%	6%					
<b>Group</b>	6%	5%	4%	3%	5%	6%	5%					
<b>Silver</b>	2%	2%	4%	3%	1%	1%	5%					
<b>Wedding</b>	8%	6%	4%	5%	3%	3%	5%					
<b>Sport</b>	35%	40%	42%	35%	41%	43%	38%					
<b>18-35</b>	64%	71%	61%	67%	78%	79%	50%					
<b>36-55</b>	29%	24%	32%	27%	19%	19%	42%					
<b>Child</b>	15%	9%	22%	14%	11%	13%	28%					
<b>Honeymoon</b>	4%	3%	5%	2%	3%	1%	5%					
<b>Repeat</b>	48%	43%	50%	43%	36%	28%	43%					
<b>TOTAL</b>	<b>351</b>	<b>350</b>	<b>350</b>	<b>350</b>	<b>351</b>	<b>351</b>	<b>350</b>					

# SECTION 1 **PROFILE OF RESPONDENTS**

# MARITAL STATUS - TRACKING

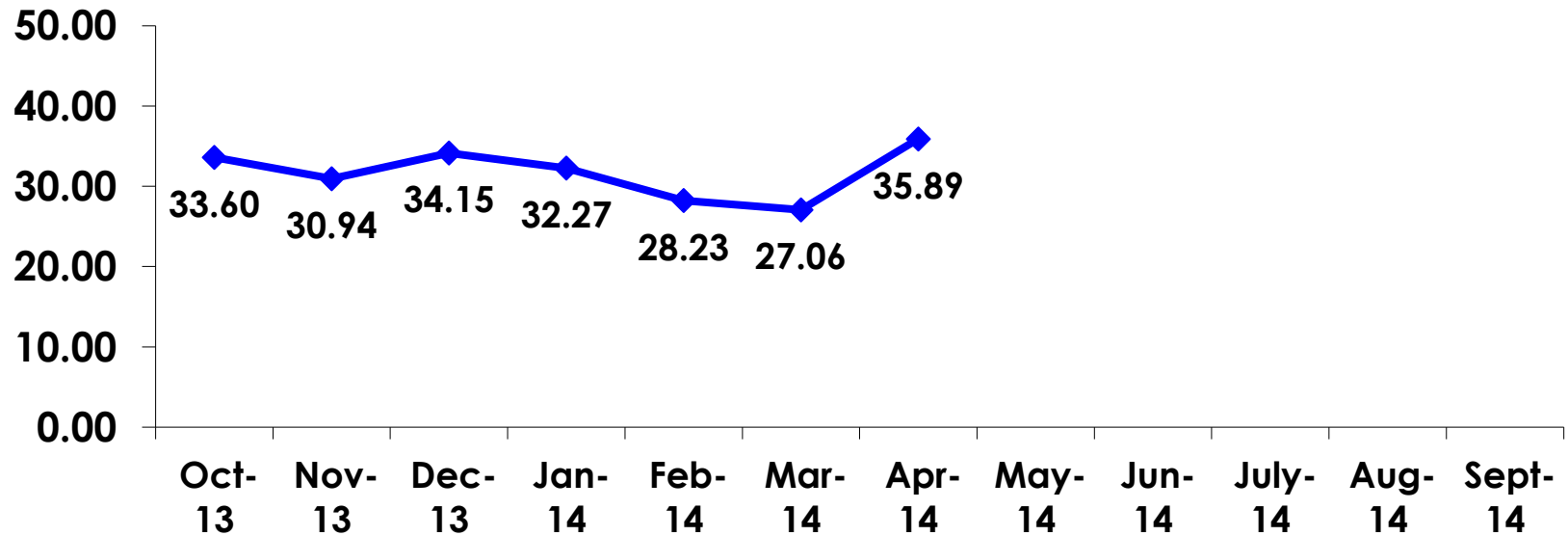


# MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	56%	86%	15%	56%	100%	74%	56%	29%	80%	89%	89%	67%
	Single	44%	14%	85%	44%		26%	44%	71%	20%	11%	11%	33%
	Total Count	350	181	20	16	19	19	133	174	148	98	19	152



# AVERAGE AGE - TRACKING



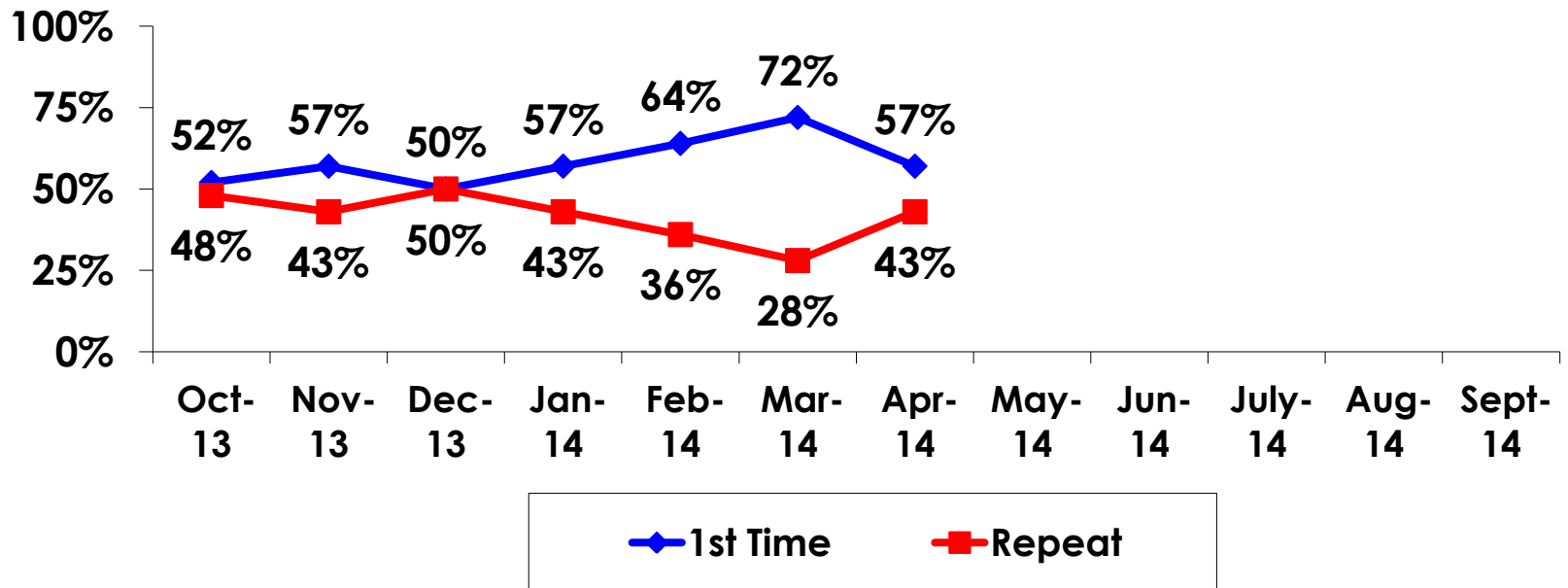
# AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	23%	8%	40%	19%		26%	20%	46%		3%	26%	13%
	25-34	26%	20%	25%	38%		42%	26%	52%		8%	42%	24%
	35-49	37%	55%	25%	31%		16%	42%	2%	85%	79%	32%	46%
	50+	14%	17%	10%	13%	100%	16%	13%		15%	10%		17%
	Total Count	350	181	20	16	19	19	133	174	148	98	19	152
QF	Mean	35.89	40.47	30.95	36.31	64.32	33.63	36.44	25.47	43.18	41.86	30.89	38.76
	Median	36	40	29	33	65	30	37	25	42	42	30	39

# INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q26	<Y2.0 million	5%	6%	11%	7%	5%	11%	4%	7%	4%	4%		5%	
	Y2.0M-Y3.0M	13%	6%	26%	13%	21%		14%	17%	8%	5%	11%	9%	
	Y3.0M-Y4.0M	12%	8%	26%	13%	11%	5%	11%	14%	8%	3%	16%	13%	
	Y4.0M-Y5.0M	16%	19%	11%	7%	5%	42%	17%	19%	16%	19%	32%	13%	
	Y5.0M-Y7.0M	20%	22%	21%	53%	16%	26%	20%	14%	26%	24%	26%	19%	
	Y7.0M-Y10.0M	15%	22%		7%	21%	16%	17%	11%	19%	23%	11%	17%	
	Y10.0M+	11%	14%	5%		21%		12%	6%	17%	19%	5%	17%	
	No Income	7%	3%					5%	13%	1%	3%		7%	
	Total	Count	342	178	19	15	19	19	131	169	145	96	19	151

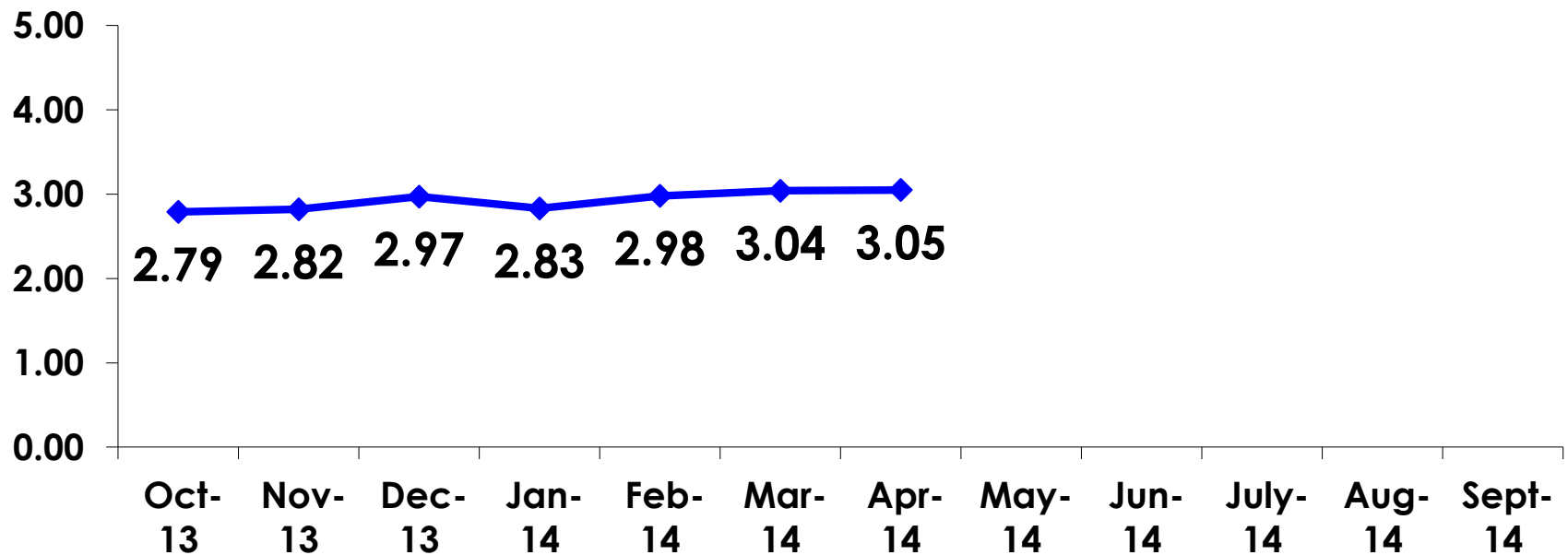
# PRIOR TRIPS TO GUAM - TRACKING



# PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	57%	48%	60%	75%	63%	74%	59%	68%	45%	34%	79%	
	No	43%	52%	40%	25%	37%	26%	41%	32%	55%	66%	21%	100%
	Total Count	350	181	20	16	19	19	133	174	148	98	19	152

# 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	3.05	3.25	2.75	2.75	3.26	3.16	2.97	2.92	3.13	3.33	3.47	3.07
	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	60%	63%	58%		47%	58%	67%	58%	65%	66%	53%	59%	
	Full package tour	21%	25%	26%		32%	42%	14%	22%	20%	26%	42%	23%	
	Individually arranged travel (FIT)	7%	8%			5%		6%	6%	8%	6%		10%	
	Company paid travel	6%	1%	11%		11%		5%	9%	2%	1%	5%	5%	
	Group tour	5%	2%	5%	100%	5%		8%	5%	4%	1%		3%	
	Other	1%	1%							1%			1%	
	Total	Count	345	180	19	16	19	19	132	170	147	97	19	151

# TRAVEL MOTIVATION - SEGMENTATION

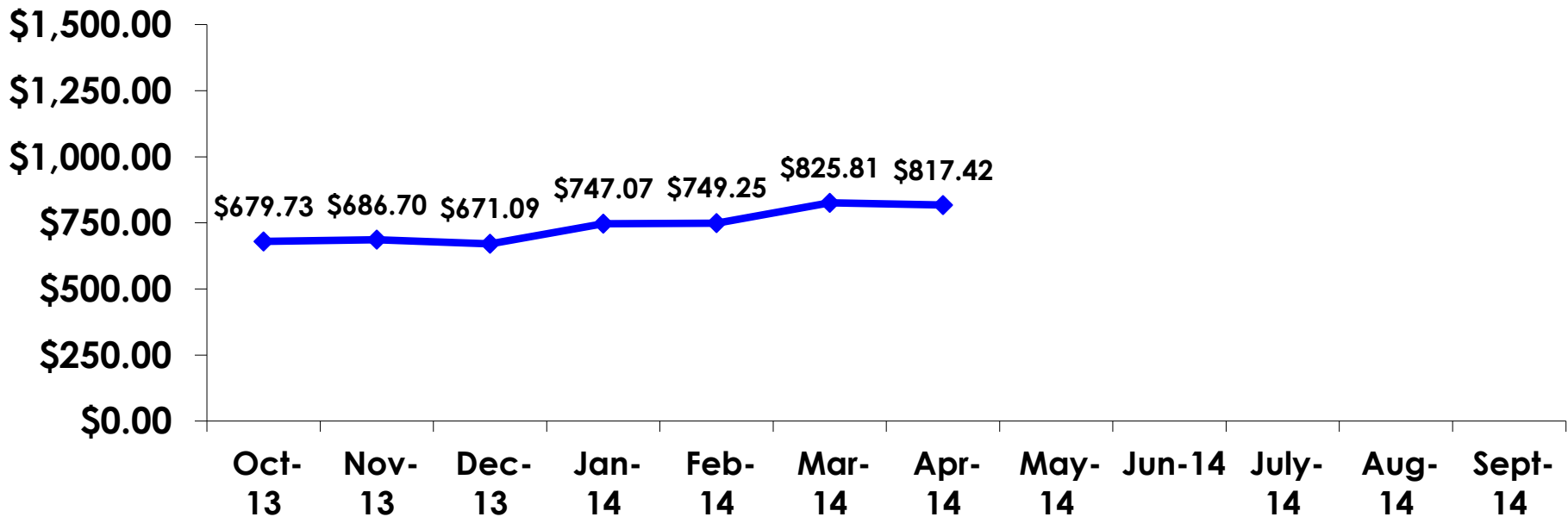
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	32%	38%	30%	19%	26%	11%	32%	23%	41%	49%	16%	72%
	Price	26%	30%	35%	6%	16%	11%	27%	24%	31%	35%	26%	30%
	Visit friends/ Relatives	2%	2%					2%	3%	2%	1%		1%
	Recomm- friend/family/trvl agnt	17%	8%	30%	31%	16%		17%	22%	12%	8%		11%
	Scuba	5%	5%	5%				8%	5%	4%	3%		6%
	Water sports	21%	21%	35%	6%	11%		35%	18%	27%	31%		20%
	Short travel time	50%	60%	65%	13%	32%	26%	53%	40%	63%	68%	42%	57%
	Golf	4%	3%		6%	47%		5%		4%	2%		5%
	Relax	36%	36%	35%	13%	16%		39%	34%	39%	38%	32%	42%
	Company/ Business Trip	12%	3%	20%	56%	11%		10%	15%	9%	2%	5%	11%
	Company Sponsored	3%	2%		13%			3%	3%	3%			3%
	Safe	22%	30%	10%	13%	21%	11%	23%	17%	29%	39%	21%	26%
	Natural beauty	58%	63%	50%	19%	42%	11%	68%	55%	66%	74%	47%	63%
	Shopping	30%	33%	25%		21%	21%	23%	31%	32%	29%	47%	34%
	Career Cert/ Testing	0%	1%					1%		1%	1%		
	Married/ Attn wedding	5%	10%	5%		5%	100%	2%	8%	3%	4%	26%	3%
	Honeymoon	5%	9%				26%	4%	8%	4%	1%	100%	3%
	Pleasure	49%	51%	40%	13%	37%	5%	59%	47%	55%	56%	26%	52%
	Organized sports	1%						1%	2%				1%
	Other	3%	6%			11%		3%	1%	5%	7%		5%
	Total Count	348	181	20	16	19	19	133	172	148	98	19	152

# INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	77%	76%	75%	56%	37%	79%	80%	78%	80%	77%	89%	80%	
	Travel Guidebook- Bookstore	52%	56%	70%	56%	42%	63%	53%	54%	51%	50%	47%	51%	
	Travel Agent Brochure	46%	50%	60%	25%	53%	58%	50%	45%	47%	48%	53%	41%	
	Prior Trip	35%	41%	25%	19%	37%	21%	32%	22%	47%	55%	16%	80%	
	Magazine (Consumer)	35%	35%	20%	31%	21%	47%	35%	40%	31%	34%	32%	34%	
	Friend/ Relative	25%	18%	20%	44%	21%	37%	24%	32%	18%	16%	26%	11%	
	TV	11%	10%	5%	6%	16%	5%	9%	10%	9%	9%	16%	7%	
	Co-Worker/ Company Trvl Dept	5%	4%		6%	11%	5%	5%	5%	5%	1%	16%	1%	
	Consumer Trvl Show	3%	1%					5%	5%	1%	2%		1%	
	Newspaper	2%	2%			5%		2%	2%	1%	1%	5%	1%	
	Other	1%	1%							1%			1%	
	Travel Trade Show	0%	1%			5%	5%				1%			
	GVB Office	0%							1%					
	Total	Count	350	181	20	16	19	19	133	174	148	98	19	152

# SECTION 3 **EXPENDITURES**

# PREPAID EXPENDITURES - TRACKING

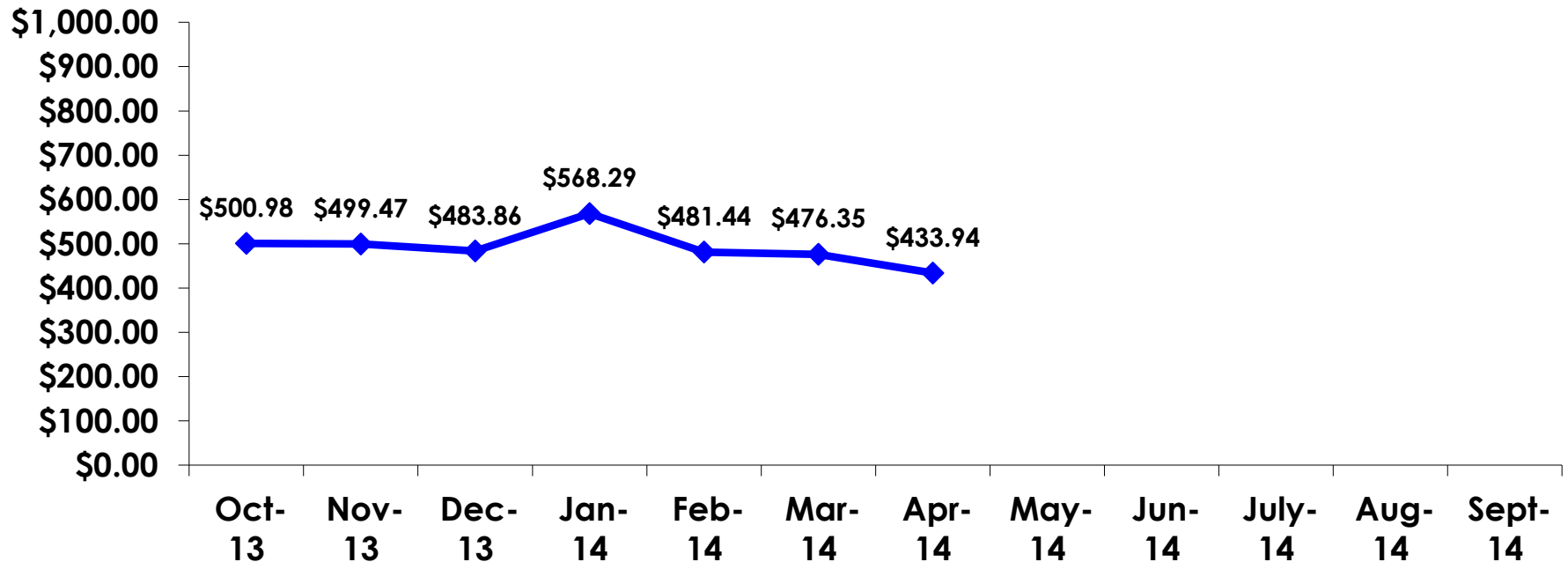


YTD=\$739.57

# 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	\$817.42	\$990.13	\$889.84	\$335.41	\$915.27	\$1,247.63	\$812.53	\$775.54	\$851.00	\$1,016.55	\$1,234.03	\$888.20
	Median	\$780	\$878	\$780	\$33	\$1,122	\$976	\$780	\$683	\$855	\$878	\$1,219	\$780
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$11,381	\$11,381	\$1,951	\$1,268	\$1,463	\$2,927	\$6,503	\$11,381	\$6,503	\$11,381	\$2,927	\$11,381

# ON-ISLAND EXPENDITURES - TRACKING



YTD = \$492.04

# ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

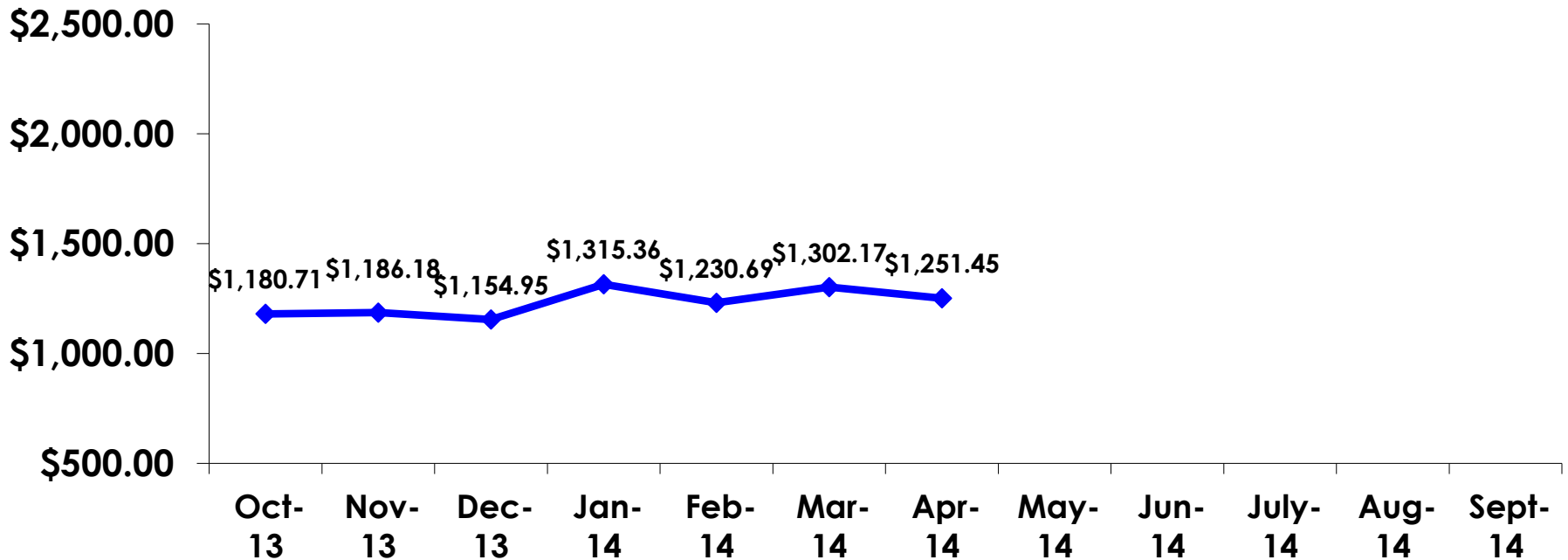
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$433.94	\$406.66	\$409.42	\$360.42	\$467.89	\$464.36	\$451.82	\$440.80	\$411.54	\$339.47	\$536.58	\$454.38
	Median	\$328	\$300	\$290	\$300	\$465	\$375	\$375	\$365	\$300	\$253	\$350	\$300
	Minimum	\$0	\$0	\$17	\$128	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$2,684	\$2,500	\$1,500	\$729	\$1,300	\$1,600	\$2,684	\$2,684	\$2,500	\$1,300	\$2,000	\$2,684



# 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	\$31.91	\$47.87	\$24.75	\$20.63	\$17.37	\$40.00	\$31.23	\$16.47	\$51.47	\$64.49	\$21.05	\$45.87
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$40.10	\$53.51	\$14.05	\$30.63	\$15.79	\$38.11	\$34.57	\$35.47	\$50.64	\$53.75	\$74.74	\$52.65
	Median	\$10	\$28	\$0	\$5	\$0	\$10	\$20	\$10	\$20	\$30	\$30	\$20
F&B RESTRNT	Mean	\$107.55	\$147.56	\$49.50	\$30.63	\$39.47	\$146.32	\$124.52	\$68.30	\$161.40	\$178.31	\$88.95	\$145.21
	Median	\$35	\$50	\$15	\$0	\$0	\$0	\$50	\$10	\$60	\$75	\$40	\$50
OPT TOUR	Mean	\$99.98	\$129.92	\$78.95	\$91.88	\$28.95	\$107.42	\$130.39	\$85.52	\$124.76	\$162.80	\$176.32	\$97.40
	Median	\$0	\$0	\$35	\$35	\$0	\$0	\$50	\$0	\$0	\$31	\$0	\$0
GIFT- SELF	Mean	\$232.10	\$332.09	\$78.10	\$99.06	\$221.05	\$248.29	\$254.58	\$168.67	\$295.98	\$305.71	\$362.63	\$347.78
	Median	\$50	\$100	\$20	\$0	\$0	\$100	\$50	\$13	\$100	\$100	\$100	\$100
GIFT- OTHER	Mean	\$126.11	\$168.51	\$60.05	\$85.88	\$78.42	\$161.45	\$140.54	\$103.46	\$161.40	\$169.87	\$236.32	\$149.45
	Median	\$81	\$100	\$20	\$50	\$0	\$100	\$100	\$50	\$100	\$100	\$150	\$100
TRANS	Mean	\$16.11	\$20.85	\$6.00	\$0.81	\$19.21	\$9.89	\$18.45	\$11.12	\$21.89	\$30.32	\$27.79	\$22.61
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$125.59	\$132.05	\$222.10	\$125.63	\$158.95	\$153.00	\$124.03	\$108.16	\$140.79	\$136.42	\$69.58	\$82.92
	Median	\$0	\$0	\$28	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$788.28	\$1,046.72	\$529.00	\$485.13	\$716.05	\$904.47	\$859.89	\$599.99	\$1,007.66	\$1,127.17	\$1,057.37	\$956.59
	Median	\$500	\$700	\$340	\$450	\$500	\$625	\$600	\$500	\$700	\$850	\$700	\$601

# TOTAL EXPENDITURES – TRACKING



YTD=\$1,231.64

# 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	\$1,302.17	\$1,593.33	\$1,256.30	\$1,364.18	\$2,351.76	\$2,202.32	\$1,222.60	\$1,189.34	\$1,735.32	\$1,521.23	\$1,376.97	\$1,539.03
	Median	\$1,176	\$1,374	\$1,283	\$921	\$2,218	\$1,674	\$1,132	\$1,085	\$1,406	\$1,351	\$1,375	\$1,278
	Minimum	\$0	\$0	\$200	\$200	\$1,481	\$985	\$0	\$0	\$0	\$0	\$689	\$0
	Maximum	\$11,380	\$10,702	\$2,681	\$11,380	\$3,357	\$5,305	\$7,349	\$7,349	\$11,380	\$10,702	\$2,257	\$11,380

# SECTION 4 **ADVANCED STATISTICS**

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# 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 2014, and Overall Oct-2013 - Apr 2014**

	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	<b>Apr-14</b>	Combin ed Oct- 2013 - Apr 2014
Drivers:	rank	rank	rank	rank	rank	rank	<b>rank</b>	rank
Quality & Cleanliness of beaches & parks			3	4	2	1		4
Ease of getting around								
Safety walking around at night								
Quality of daytime tours	2			3		4		
Variety of daytime tours								6
Quality of nighttime tours								9
Variety of nighttime tours								
Quality of shopping	4		5				<b>1</b>	3
Variety of shopping				1				
Price of things on Guam				5	4	2		
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	<b>3</b>	1
Quality of ground handler		1					<b>2</b>	7
Quality/cleanliness of transportation vehicles		3	4				<b>4</b>	2
% of Per Person On Island Expenditures Accounted For	45.2%	41.7%	47.4%	42.5%	52.4%	51.5%	<b>35.8%</b>	45.1%

NOTE: Only significant drivers are included.

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# DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by four significant factors in the April 2014 Period. By rank order they are:
  - **Quality of shopping,**
  - **Quality of ground handler,**
  - **Quality of landscape in Guam, and**
  - **Quality/cleanliness of transportation vehicles.**
- With all four factors the overall  $r^2$  is .358 meaning that **35.8% 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 2014 and Overall Oct-2013-Apr 2014								
	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	Combin ed Oct- 2013- Apr 2014
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks								3
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								
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%	<b>0.0%</b>	1.3%
NOTE: Only significant drivers are included.								



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# Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** of Japanese visitors on Guam is driven by no significant factor in the April 2014 Period.