



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2016 Market Segmentation

APRIL 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 **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.

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

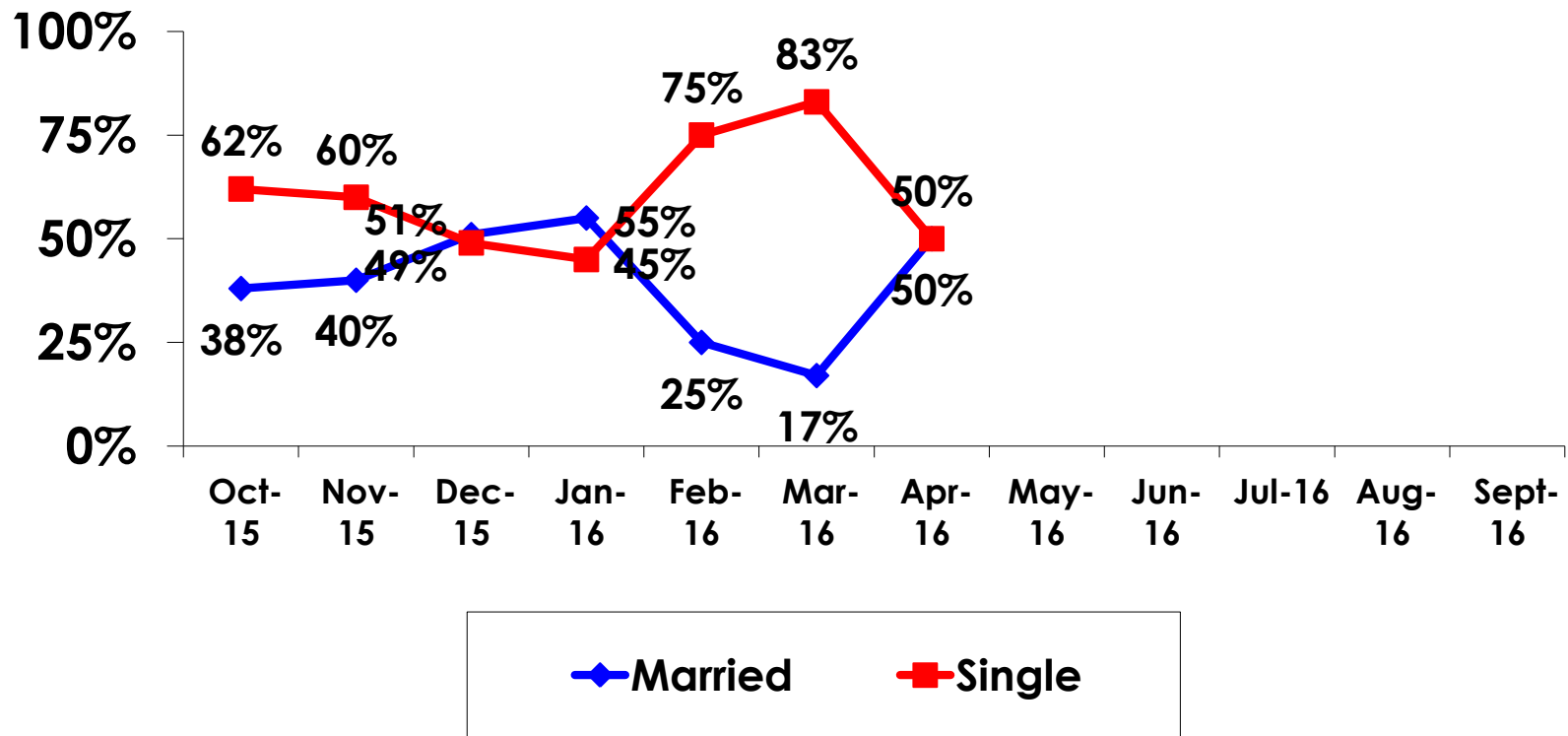
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%	25%	18%	42%					
Office Lady	9%	12%	10%	12%	10%	7%	11%					
Group	5%	7%	5%	1%	6%	5%	3%					
Silver	6%	2%	4%	5%	2%	3%	7%					
Wedding	7%	9%	3%	3%	4%	3%	8%					
Sport	31%	37%	33%	37%	29%	40%	25%					
18-35	73%	66%	55%	49%	81%	85%	60%					
36-55	19%	29%	37%	44%	15%	10%	30%					
Child	6%	14%	26%	35%	7%	5%	14%					
Honeymoon	7%	3%	5%	2%	3%	2%	5%					
Repeat	35%	46%	50%	56%	32%	26%	49%					
TOTAL	351	351	356	353	354	356	350					

SECTION 1 **PROFILE OF RESPONDENTS**

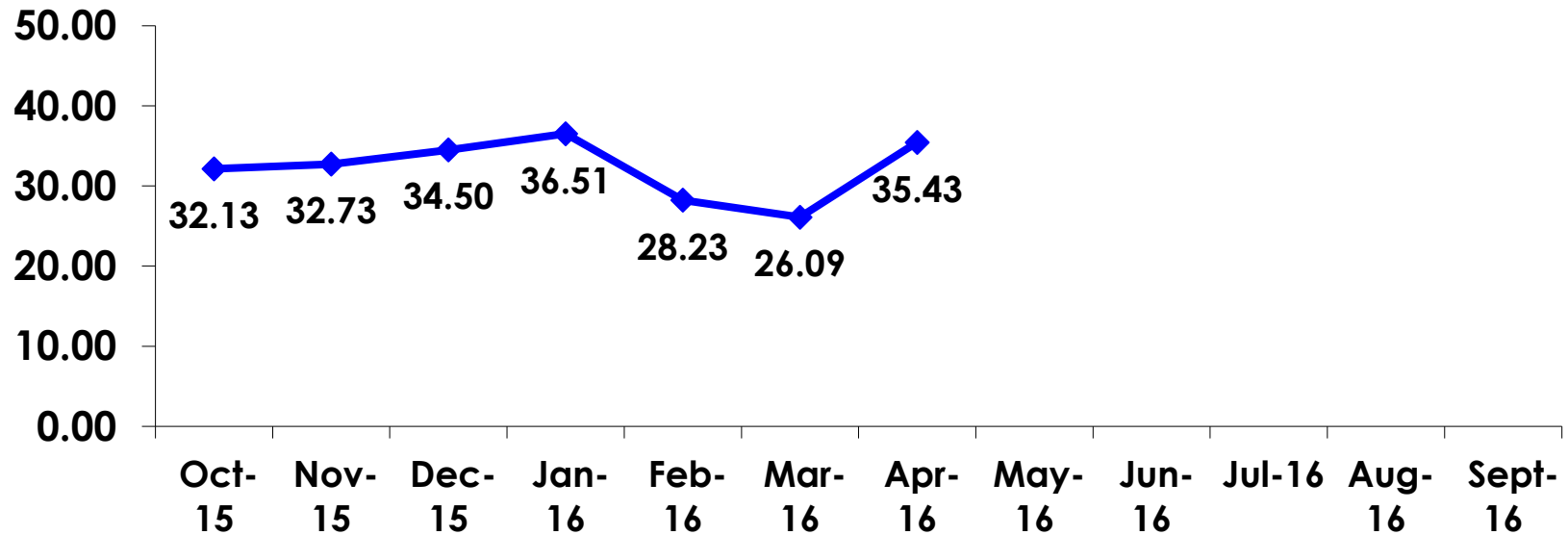
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	50%	86%	8%	56%	88%	64%	47%	29%	80%	94%	100%	57%
	Single	50%	14%	92%	44%	12%	36%	53%	71%	20%	6%		43%
	Total Count	348	147	38	9	25	28	88	209	104	49	18	170

AVERAGE AGE - TRACKING



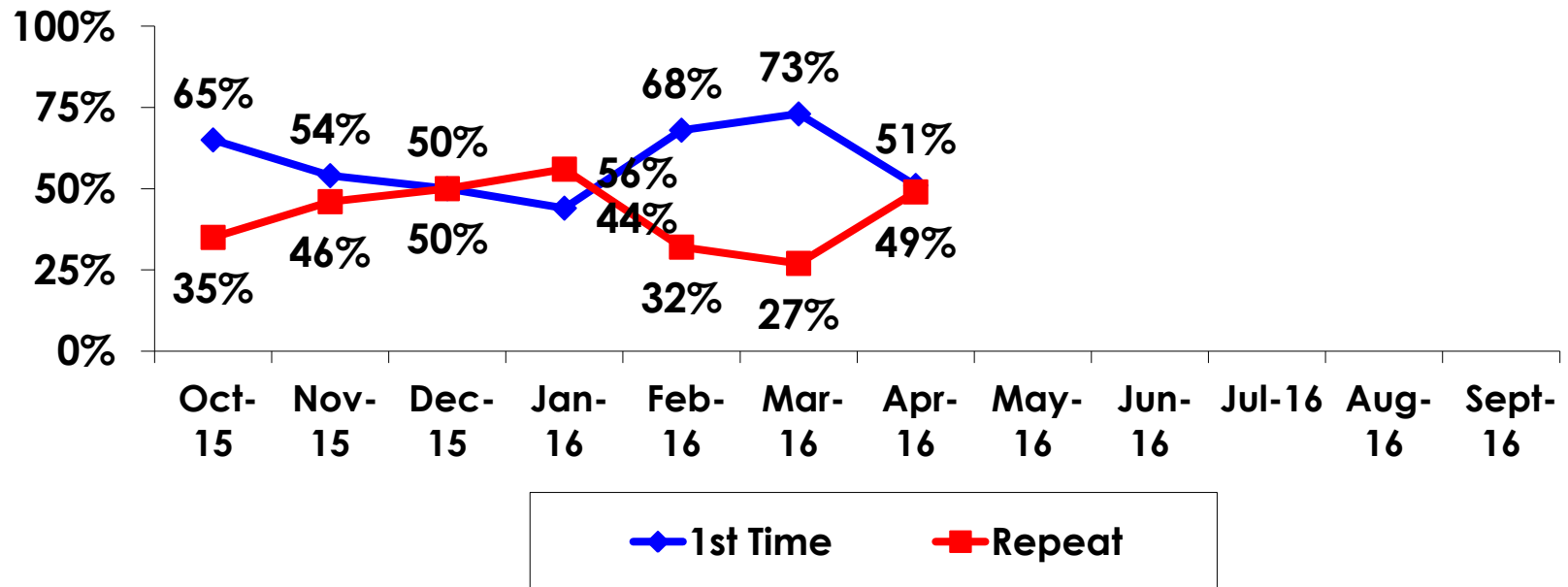
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	22%	4%	24%	11%			26%	37%			17%	11%
	25-34	36%	29%	55%	33%		68%	36%	59%		18%	44%	29%
	35-49	27%	45%	16%	22%		21%	26%	4%	81%	73%	33%	36%
	50+	16%	22%	5%	33%	100%	11%	11%		19%	8%	6%	25%
	Total Count	349	147	38	9	25	28	88	210	104	49	18	170
QF	Mean	35.43	41.37	30.13	43.22	65.32	35.11	33.97	26.32	44.52	41.69	33.17	40.37
	Median	31	40	29	36	64	30	30	26	45	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	6%	1%	5%		4%	4%	5%	9%			6%	5%	
	Y2.0M-Y3.0M	12%	8%	38%	11%	13%	7%	17%	14%	7%	9%	6%	9%	
	Y3.0M-Y4.0M	15%	11%	22%	22%	17%	21%	13%	18%	8%	13%	6%	12%	
	Y4.0M-Y5.0M	13%	12%	11%	33%	30%	18%	12%	14%	8%	9%	24%	13%	
	Y5.0M-Y7.0M	22%	29%	19%	11%	9%	29%	24%	20%	29%	18%	41%	24%	
	Y7.0M-Y10.0M	14%	20%	3%		17%	11%	17%	9%	24%	27%	6%	14%	
	Y10.0M+	13%	18%	3%	11%	4%	11%	12%	9%	23%	22%	12%	22%	
	No Income	4%	1%		11%	4%		1%	7%		2%		1%	
	Total	Count	313	137	37	9	23	28	78	184	96	45	17	155

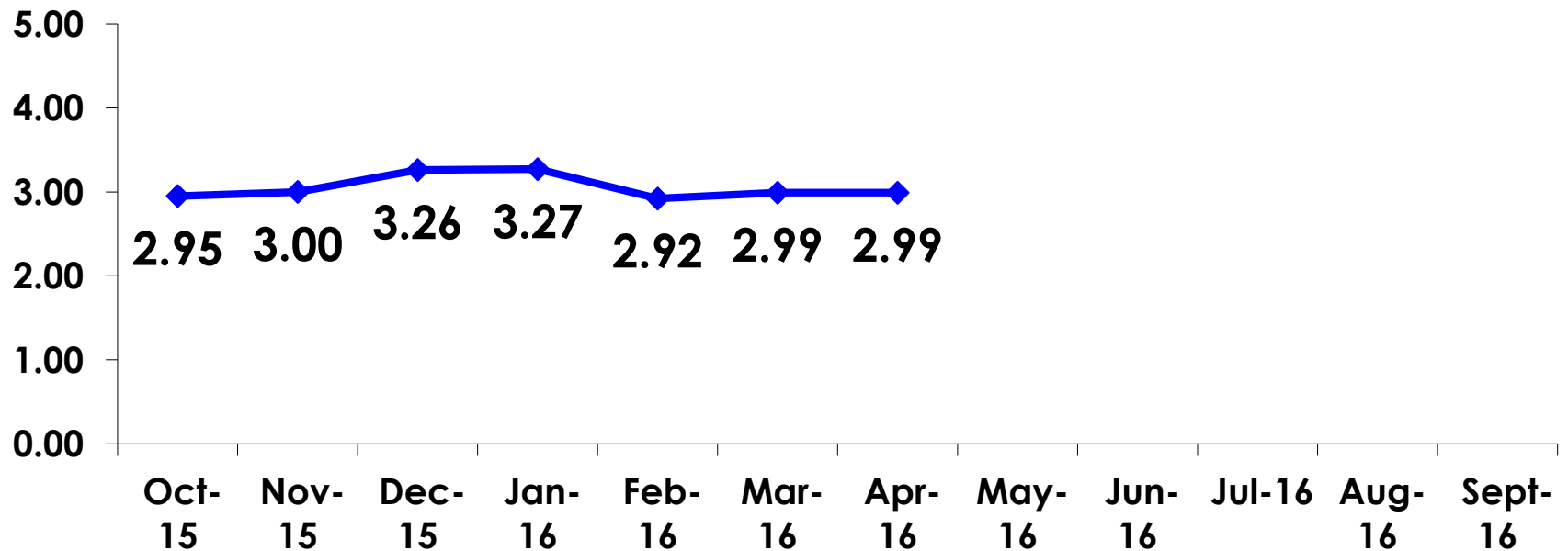
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	51%	42%	58%	22%	28%	64%	63%	67%	29%	37%	72%	
	No	49%	58%	42%	78%	72%	36%	38%	33%	71%	63%	28%	100%
	Total Count	350	147	38	9	25	28	88	210	104	49	18	170

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	2.99	3.27	2.68	2.33	3.24	2.93	3.07	2.87	3.16	3.41	3.67	3.10
	Median	3	3	3	2	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	63%	62%	66%		50%	63%	63%	67%	61%	55%	61%	58%	
	Full package tour	22%	27%	18%		29%	22%	23%	21%	20%	24%	39%	20%	
	Individually arranged travel (FIT)	8%	10%	3%		8%	11%	8%	7%	11%	18%		12%	
	Company paid travel	4%	1%	8%				5%	2%	6%			5%	
	Group tour	3%	1%	5%	100%	8%		1%	2%	2%	2%		4%	
	Other	1%				4%	4%		0%				1%	
	Total	Count	344	142	38	9	24	27	87	206	103	49	18	167

TRAVEL MOTIVATION - SEGMENTATION

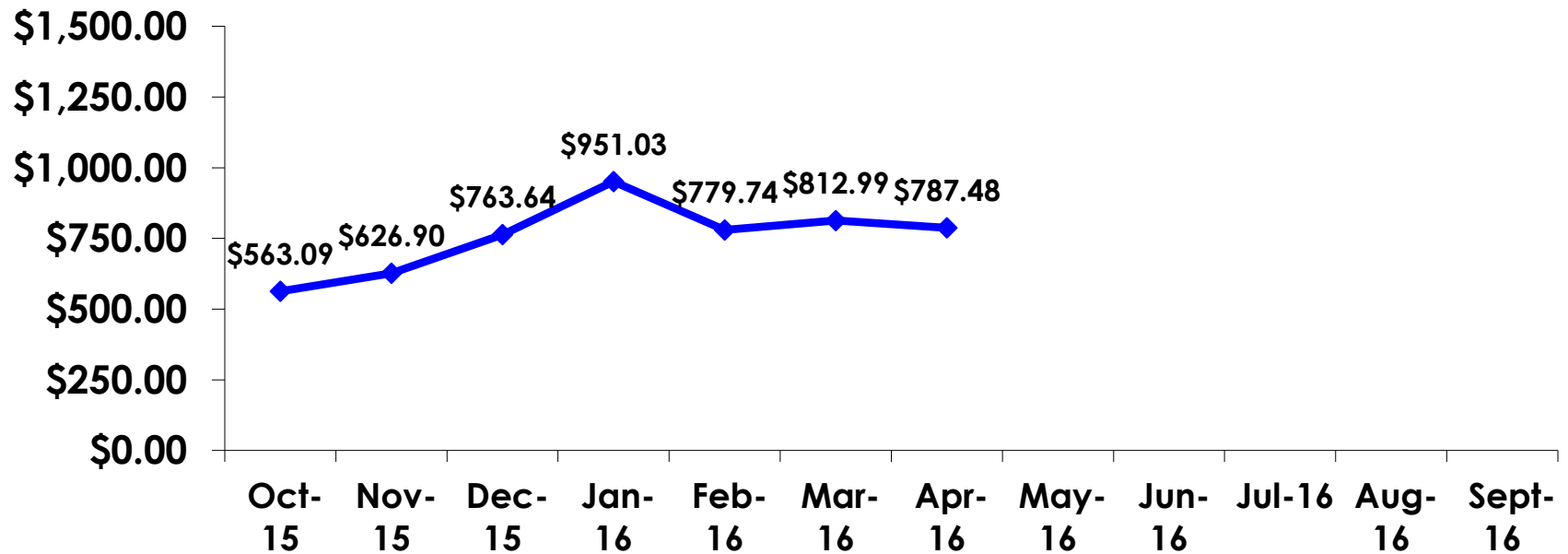
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	34%	41%	35%	56%	44%	32%	24%	24%	52%	45%	22%	69%
	Price	28%	28%	11%		24%		24%	28%	29%	33%	22%	25%
	Visit friends/ Relatives	3%	4%			4%			2%	3%	2%		4%
	Recomm-friend/family/trvl agnt	16%	7%	24%		8%		22%	22%	8%	10%	6%	7%
	Scuba	3%	2%	3%			4%	6%	3%	5%	4%		3%
	Water sports	20%	18%	30%	11%	16%	4%	40%	20%	22%	20%	28%	21%
	Short travel time	49%	58%	38%	22%	44%	11%	45%	47%	58%	65%	33%	51%
	Golf	3%	1%	5%		4%	4%	7%	2%	2%	2%		2%
	Relax	35%	35%	22%	33%	36%	7%	34%	38%	28%	31%	11%	36%
	Company/ Business Trip	8%	3%	14%	78%	12%		7%	6%	9%	2%		11%
	Company Sponsored	1%	3%					1%		3%	4%		2%
	Safe	30%	31%	24%	22%	24%	4%	31%	26%	37%	35%	11%	37%
	Natural beauty	55%	54%	57%	22%	36%	21%	64%	59%	53%	63%	39%	54%
	Shopping	28%	33%	30%	11%	24%	18%	26%	28%	28%	33%	22%	32%
	Career Cert/ Testing	1%	1%					1%	0%	1%	2%		1%
	Married/ Attn wedding	8%	12%	14%		4%	100%	6%	9%	7%	8%	22%	6%
	Honeymoon	5%	12%	3%			14%	9%	5%	7%	2%	100%	3%
	Pleasure	42%	43%	35%	22%	24%	14%	49%	44%	42%	49%	39%	39%
	Organized sports	3%	1%	5%				2%	2%	4%	2%		4%
	Other	3%	4%	3%					2%	7%	10%		3%
	Total Count	348	147	37	9	25	28	88	208	104	49	18	170

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	81%	79%	79%	44%	60%	71%	83%	83%	80%	86%	72%	79%	
	Travel Guidebook- Bookstore	52%	48%	66%	33%	40%	68%	61%	52%	53%	47%	33%	44%	
	Prior Trip	41%	51%	37%	67%	60%	32%	31%	26%	63%	57%	28%	85%	
	Travel Agent Brochure	37%	41%	26%	44%	48%	21%	47%	35%	38%	45%	44%	34%	
	Friend/ Relative	29%	21%	26%	22%	12%	46%	35%	37%	18%	20%	28%	19%	
	Magazine (Consumer)	24%	27%	18%	22%	8%	18%	24%	28%	21%	22%	33%	19%	
	TV	11%	12%	5%		8%	7%	8%	11%	13%	16%	6%	11%	
	Co-Worker/ Company Trvl Dept	3%	3%	3%	22%	4%		6%	2%	3%	2%	11%	3%	
	Consumer Trvl Show	2%	1%	3%			4%		3%			6%	2%	
	Newspaper	1%	1%					1%	1%	1%	2%		1%	
	GVB Office	1%	1%			4%			0%	1%	2%		1%	
	Other	1%	1%						0%	1%				
	GVB Promo	1%	1%							2%			1%	
	Total	Count	350	147	38	9	25	28	88	210	104	49	18	170

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$755.29

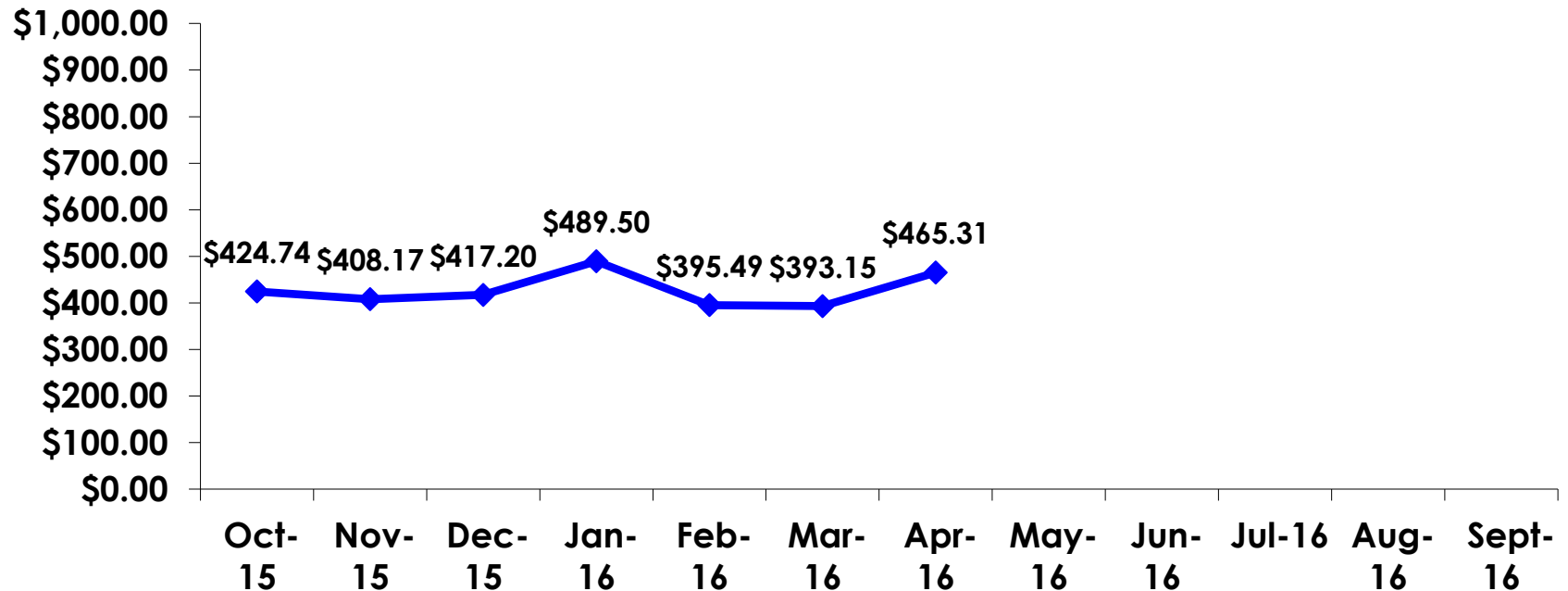
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$787.48	\$968.33	\$877.93	\$333.76	\$761.64	\$1,510.09	\$1,107.35	\$761.40	\$839.23	\$686.73	\$1,519.86	\$740.36
	Median	\$675	\$842	\$583	\$0	\$819	\$910	\$819	\$587	\$793	\$637	\$1,252	\$637
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$455	\$0
	Maximum	\$9,558	\$9,558	\$9,102	\$1,365	\$1,365	\$9,558	\$9,558	\$9,558	\$5,052	\$1,820	\$4,551	\$9,558

PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,535.63	\$2,060.59	\$1,602.29	\$12,493.17	\$1,599.92	\$2,692.76	\$1,795.41	\$1,421.03	\$1,799.65	\$2,094.43	\$2,776.26	\$1,350.48
	Median	\$910	\$1,820	\$728	\$774	\$1,365	\$1,820	\$956	\$728	\$1,456	\$1,912	\$2,321	\$1,001
AIR/ HOTEL/ MEAL	Mean	\$2,628.80	\$3,249.59	\$1,092.30	.	\$2,063.23	\$910.25	\$2,184.60	\$2,856.67	\$2,693.33	\$3,391.59	\$2,389.40	\$3,354.77
	Median	\$2,207	\$2,640	\$1,092	.	\$1,365	\$910	\$2,367	\$1,934	\$2,367	\$3,641	\$2,389	\$2,549
AIR ONLY	Mean	\$1,031.70	\$1,344.44	\$910.25	.	\$391.41	\$1,638.45	\$1,222.01	\$763.08	\$1,311.77	\$1,621.54	.	\$1,262.83
	Median	\$910	\$1,411	\$910	.	\$391	\$1,638	\$956	\$910	\$1,274	\$1,638	.	\$1,146
HOTEL ONLY	Mean	\$747.16	\$1,053.29	\$182.05	.	\$682.69	\$546.15	\$1,244.01	\$400.51	\$1,046.79	\$1,274.35	.	\$915.31
	Median	\$614	\$728	\$182	.	\$683	\$546	\$455	\$364	\$774	\$865	.	\$728
HOTEL & MEAL	Mean	\$409.61	\$409.61	.	.	.	.	.	.	\$409.61	.	.	\$409.61
	Median	\$410	\$410	.	.	.	.	.	.	\$410	.	.	\$410
F&B HOTEL	Mean	\$135.02	\$136.54	\$91.02	.	.	.	\$18.20	\$152.47	\$100.13	.	.	\$81.92
	Median	\$68	\$137	\$91	.	.	.	\$18	\$68	\$100	.	.	\$46
TRANS- JAPAN	Mean	\$121.14	\$184.98	\$45.51	.	\$50.97	\$45.51	\$157.64	\$81.98	\$206.11	\$378.21	\$142.61	\$135.15
	Median	\$58	\$91	\$46	.	\$51	\$46	\$100	\$73	\$86	\$300	\$137	\$46
TRANS- GUAM	Mean	\$170.67	\$128.95	\$45.51	.	\$250.32	.	\$18.20	\$163.84	\$45.51	\$182.05	.	\$216.94
	Median	\$46	\$46	\$46	.	\$250	.	\$18	\$46	\$46	\$182	.	\$114
OPT TOURS	Mean	\$267.27	\$245.77	\$494.95	.	\$455.12	\$91.02	\$376.29	\$301.71	\$191.15	\$286.73	\$263.97	\$272.74
	Median	\$182	\$218	\$182	.	\$455	\$91	\$255	\$182	\$91	\$291	\$264	\$182
OTHER	Mean	\$762.15	\$1,333.01	\$212.39	\$91.02	\$682.69	\$2,361.45	\$2,843.62	\$888.95	\$695.69	\$273.07	\$1,458.22	\$796.00
	Median	\$228	\$455	\$182	\$91	\$592	\$91	\$1,092	\$228	\$228	\$273	\$546	\$182
TOTAL	Mean	\$1,579.03	\$2,229.59	\$1,406.05	\$5,562.64	\$1,566.72	\$2,919.30	\$1,945.60	\$1,464.65	\$1,819.96	\$2,145.27	\$3,191.44	\$1,502.76
	Median	\$933	\$1,820	\$728	\$0	\$1,365	\$1,729	\$1,070	\$819	\$1,456	\$1,948	\$2,412	\$1,001

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$427.56

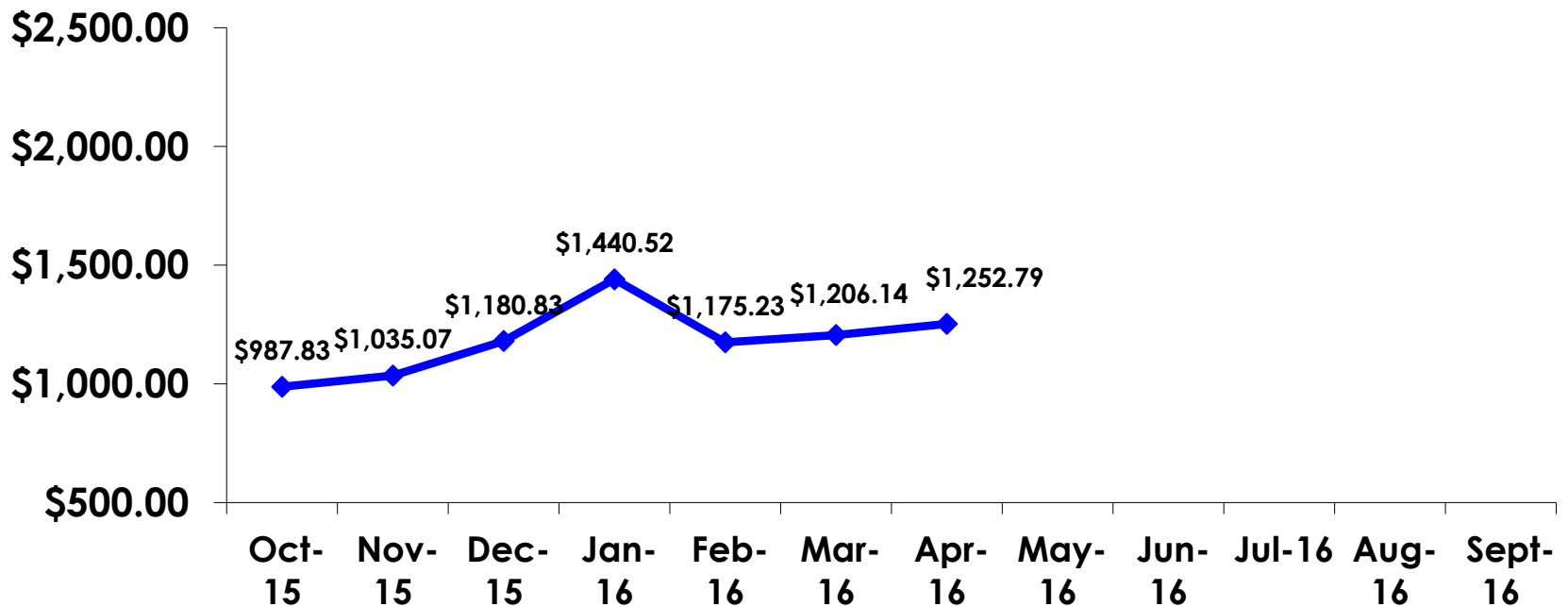
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$465.31	\$488.24	\$439.30	\$579.67	\$502.24	\$355.30	\$466.95	\$452.04	\$484.35	\$421.97	\$544.91	\$496.11
	Median	\$338	\$300	\$313	\$350	\$300	\$300	\$393	\$338	\$350	\$250	\$500	\$329
	Minimum	\$0	\$0	\$150	\$300	\$100	\$100	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,000	\$5,000	\$1,590	\$1,472	\$2,500	\$1,000	\$2,500	\$5,000	\$3,333	\$3,333	\$1,000	\$5,000

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	\$32.41	\$56.54	\$11.21	\$5.56	\$35.32	\$55.36	\$25.56	\$19.72	\$53.62	\$64.94	\$43.89	\$35.28
F&B FF/STORE	Mean	\$31.10	\$41.39	\$11.66	\$30.00	\$23.20	\$50.54	\$37.10	\$27.52	\$41.29	\$42.78	\$61.67	\$28.59
F&B RESTRNT	Mean	\$93.03	\$124.03	\$54.50	\$31.33	\$128.88	\$75.36	\$91.45	\$74.51	\$125.65	\$173.22	\$77.78	\$111.15
OPT TOUR	Mean	\$55.53	\$64.93	\$41.45	\$55.56	\$23.00	\$35.18	\$93.89	\$49.90	\$77.72	\$96.22	\$15.00	\$66.08
GIFT- SELF	Mean	\$155.18	\$246.21	\$107.16	\$133.33	\$89.60	\$126.29	\$134.35	\$107.07	\$273.46	\$405.20	\$167.22	\$217.48
GIFT- OTHER	Mean	\$106.83	\$138.28	\$101.47	\$168.89	\$151.16	\$128.71	\$93.92	\$92.13	\$124.66	\$171.78	\$123.89	\$118.95
TRANS	Mean	\$17.24	\$26.20	\$8.45	\$0.00	\$16.96	\$12.14	\$12.93	\$9.66	\$33.57	\$39.80	\$1.89	\$24.85
OTHER	Mean	\$266.88	\$409.65	\$159.87	\$230.00	\$214.12	\$140.04	\$228.47	\$261.40	\$292.23	\$373.67	\$611.44	\$273.36
TOTAL	Mean	\$758.20	\$1,107.24	\$495.76	\$654.67	\$682.24	\$623.61	\$717.67	\$641.91	\$1,022.21	\$1,367.61	\$1,102.78	\$875.74

TOTAL EXPENDITURES – TRACKING



YTD=\$1,182.85

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	\$1,252.79	\$1,456.57	\$1,317.23	\$913.42	\$1,263.88	\$1,865.40	\$1,574.30	\$1,213.45	\$1,323.58	\$1,108.70	\$2,064.77	\$1,236.47
	Median	\$1,038	\$1,201	\$937	\$669	\$1,210	\$1,188	\$1,160	\$992	\$1,130	\$910	\$1,877	\$1,001
	Minimum	\$0	\$0	\$200	\$300	\$300	\$100	\$271	\$0	\$0	\$100	\$455	\$0
	Maximum	\$9,963	\$9,963	\$9,402	\$2,001	\$3,865	\$9,963	\$9,963	\$9,963	\$5,302	\$4,699	\$5,051	\$9,963

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, Feb, Mar, Apr 2016, and Overall Oct 2015 - Apr 2016								
	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16	Apr-16	Combined Oct 2015 - Apr 2016
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	4	4	3					4
Ease of getting around								
Safety walking around at night								
Quality of daytime tours				2				9
Variety of daytime tours	5							
Quality of nighttime tours								
Variety of nighttime tours								
Quality of shopping		3			2	4		
Variety of shopping	2			5				3
Price of things on Guam				1				
Quality of hotel accommodations			2			2	3	5
Quality/cleanliness of air, sky			4					8
Quality/cleanliness of parks					1			
Quality of landscape in Tumon	1	1	1	3				1
Quality of landscape in Guam					4	1	1	6
Quality of ground handler						3		7
Quality/cleanliness of transportation vehicles	3	2		4	3	5	2	2
% of Overall Satisfaction Accounted For	65.6%	46.7%	53.1%	45.9%	44.2%	50.0%	53.0%	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 three significant factors in the April 2016 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Quality/cleanliness of transportation vehicles, and**
 - **Quality of hotel accommodations.**
- With all three factors the overall r^2 is .530 meaning that **53.0% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2015, Jan, Feb, Mar, Apr 2016 and Overall Oct 2015-Apr 2016								
	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16	Apr-16	Combine d Oct 2015- Apr 2016
Drivers:	rank	rank	rank	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						1		
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%	0.0%	1.9%	0.0%	1.2%

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 April 2016 Period.