



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2016 Market Segmentation

FEBRUARY 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 **354** 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 **354** 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

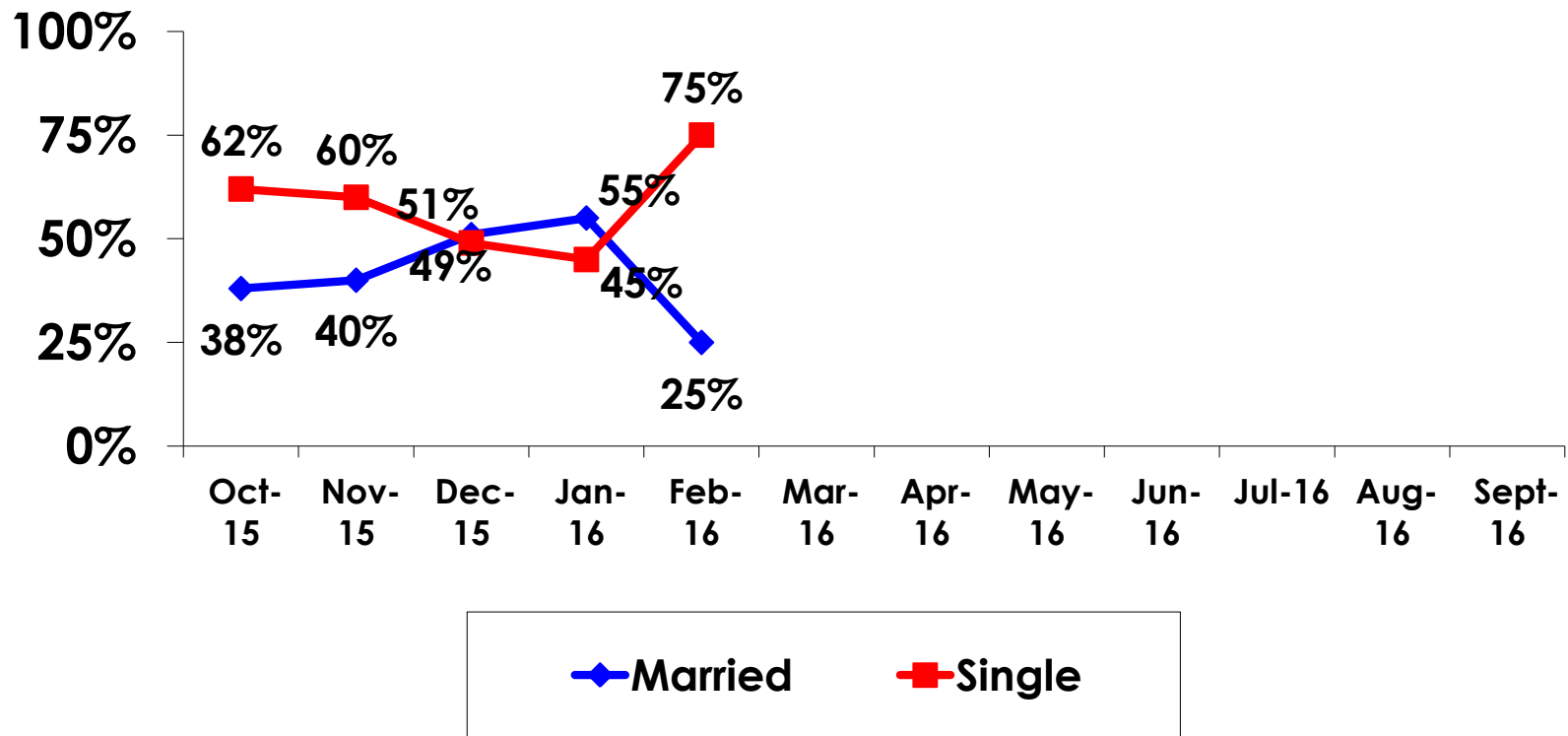
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%							
Office Lady	9%	12%	10%	12%	10%							
Group	5%	7%	5%	1%	6%							
Silver	6%	2%	4%	5%	2%							
Wedding	7%	9%	3%	3%	4%							
Sport	31%	37%	33%	37%	29%							
18-35	73%	66%	55%	49%	81%							
36-55	19%	29%	37%	44%	15%							
Child	6%	14%	26%	35%	7%							
Honey-moon	7%	3%	5%	2%	3%							
Repeat	35%	46%	50%	56%	32%							
TOTAL	351	351	356	353	354							5

SECTION 1 **PROFILE OF RESPONDENTS**

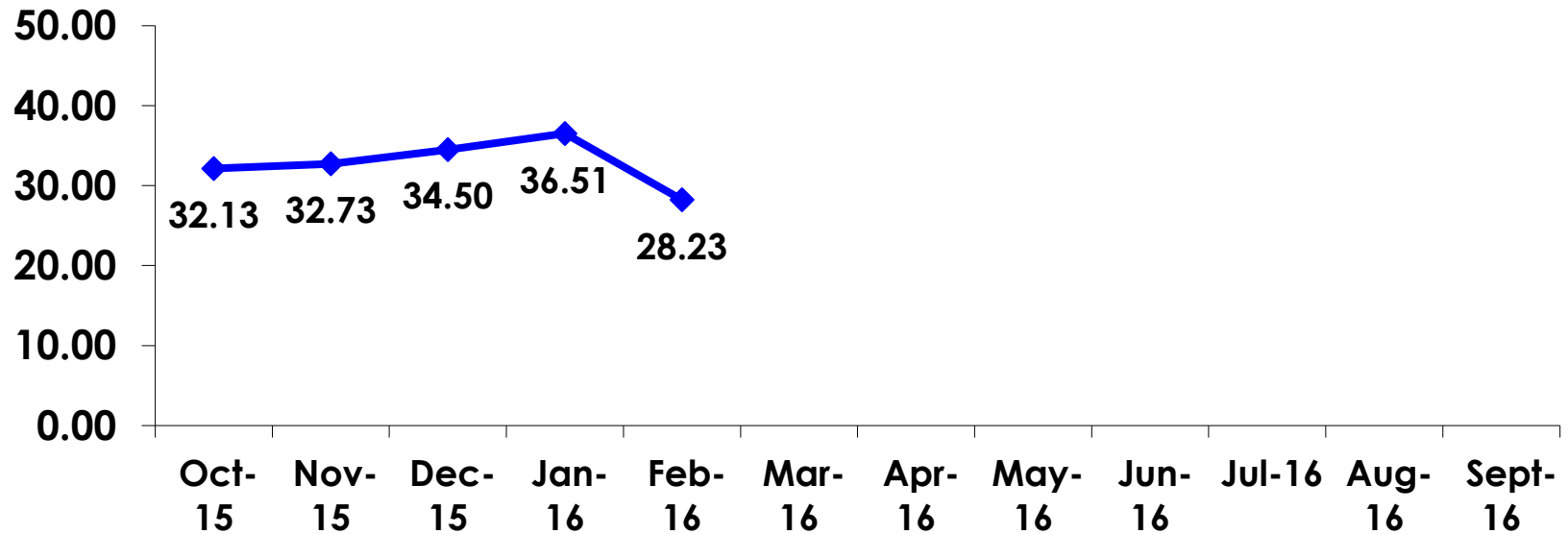
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	25%	81%	26%	19%	100%	73%	20%	13%	74%	84%	100%	35%
	Single	75%	19%	74%	81%		27%	80%	88%	26%	16%		65%
	Total Count	354	89	35	21	8	15	101	288	54	25	9	114

AVERAGE AGE - TRACKING



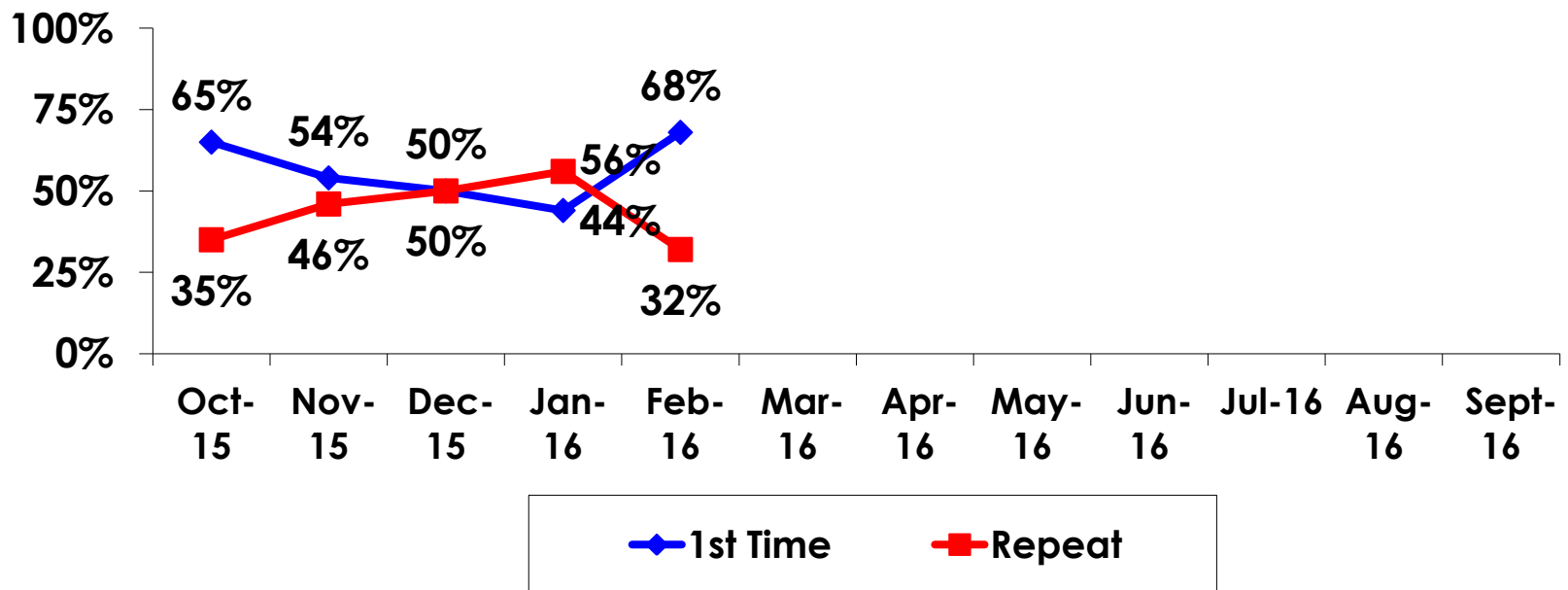
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	58%	12%	26%	67%		13%	58%	72%		12%		40%
	25-34	22%	34%	51%	10%		53%	24%	27%		20%	89%	26%
	35-49	12%	28%	14%	19%		20%	8%	1%	69%	52%	11%	21%
	50+	8%	26%	9%	5%	100%	13%	10%		31%	16%		12%
	Total Count	354	89	35	21	8	15	101	288	54	25	9	114
QF	Mean	28.23	38.75	30.00	27.33	65.50	33.60	28.50	23.75	44.48	39.24	31.00	31.95
	Median	23	37	27	22	65	29	23	22	44	40	32	29

INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	7%	2%	3%	7%		7%	4%	9%			11%	6%
	Y2.0M-Y3.0M	11%	7%	17%	21%	25%		19%	12%	6%	9%		7%
	Y3.0M-Y4.0M	12%	11%	37%		13%	20%	14%	13%	10%	4%	11%	9%
	Y4.0M-Y5.0M	14%	14%	14%	7%	25%	13%	15%	13%	17%	9%	22%	19%
	Y5.0M-Y7.0M	16%	25%	11%	14%	13%	33%	16%	14%	23%	22%	33%	15%
	Y7.0M-Y10.0M	12%	12%	3%		25%		9%	11%	15%	22%	11%	13%
	Y10.0M+	20%	24%	14%			20%	17%	19%	29%	30%	11%	27%
	No Income	7%	4%		50%		7%	5%	8%		4%		5%
	Total Count	298	83	35	14	8	15	93	238	48	23	9	101

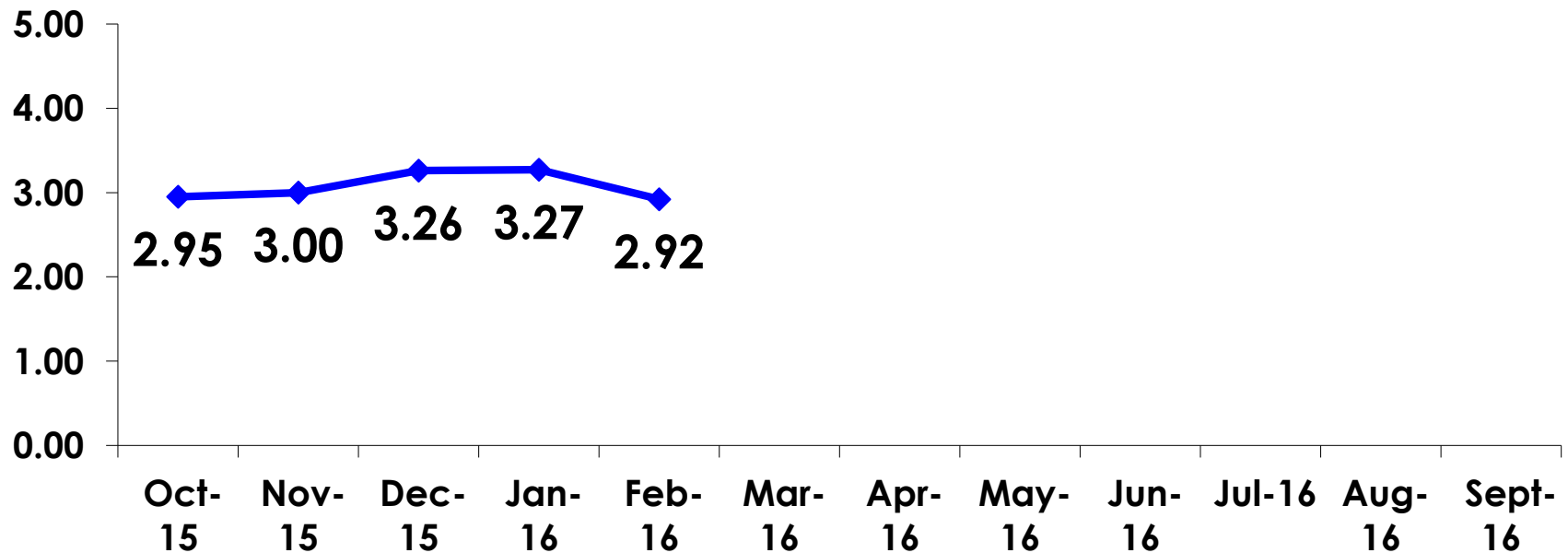
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	68%	49%	49%	76%	50%	60%	73%	73%	46%	24%	56%	
	No	32%	51%	51%	24%	50%	40%	27%	27%	54%	76%	44%	100%
	Total Count	354	89	35	21	8	15	101	288	54	25	9	114

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	2.92	3.10	2.86	2.62	3.00	3.67	3.06	2.91	2.98	3.20	4.44	3.04
	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	65%	58%	77%		63%	60%	64%	67%	55%	52%	78%	67%	
	Full package tour	22%	24%	17%		38%	20%	25%	22%	17%	16%		14%	
	Group tour	6%	3%		100%			3%	6%	9%	12%		4%	
	Individually arranged travel (FIT)	6%	15%	6%			20%	5%	4%	15%	20%	22%	12%	
	Company paid travel	2%						3%	1%	4%			2%	
	Total	Count	352	88	35	21	8	15	101	287	53	25	9	113

TRAVEL MOTIVATION - SEGMENTATION

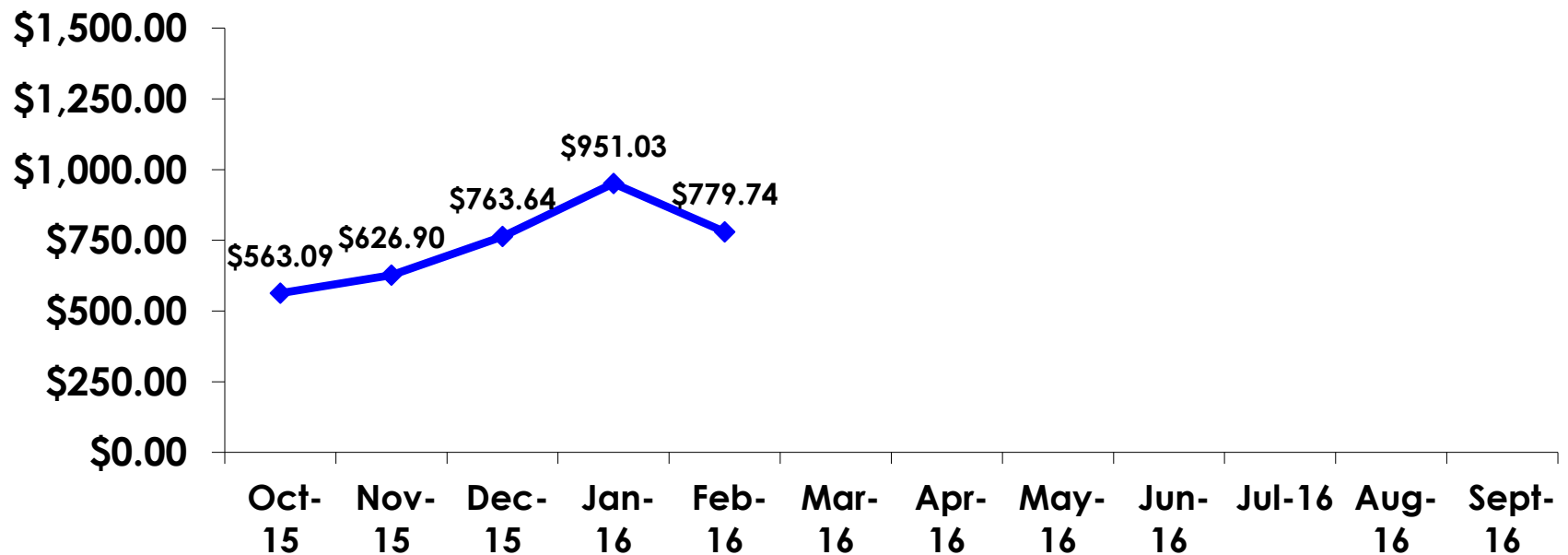
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	26%	45%	40%	10%	50%	33%	25%	21%	44%	68%	33%	80%
	Price	24%	19%	20%	10%			33%	26%	20%	16%		19%
	Visit friends/ Relatives	3%	4%	6%		13%		1%	3%	4%	8%		2%
	Recomm- friend/family/trvl agnt	32%	10%	20%	29%	25%	13%	30%	36%	15%	12%		20%
	Scuba	4%	4%			13%		6%	5%		4%		5%
	Water sports	18%	15%	6%		38%		30%	18%	17%	20%		17%
	Short travel time	47%	60%	63%	19%	38%	20%	50%	45%	54%	60%	44%	49%
	Golf	1%	4%					3%	1%	4%			4%
	Relax	33%	38%	43%	14%	13%	7%	40%	33%	35%	40%	22%	44%
	Company/ Business Trip	8%		9%	52%			8%	7%	13%	4%		5%
	Company Sponsored	1%	4%		5%				1%	4%	8%	11%	4%
	Safe	19%	26%	17%	5%	25%	7%	26%	16%	31%	32%	11%	23%
	Natural beauty	59%	56%	71%	19%	50%	7%	70%	59%	57%	68%	22%	56%
	Shopping	32%	34%	57%		25%		36%	31%	31%	28%		35%
	Married/ Attn wedding	4%	15%	6%		13%	100%	3%	4%	6%		56%	5%
	Honeymoon	3%	10%	3%			33%	1%	3%	2%		100%	4%
	Pleasure	51%	42%	54%	24%	38%	13%	62%	52%	46%	48%	22%	53%
	Organized sports	2%	1%	3%	5%			1%	2%	2%			2%
	Other	5%	4%	3%				10%	5%	7%	8%		4%
	Total Count	352	89	35	21	8	15	100	286	54	25	9	114

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	81%	79%	77%	65%	57%	87%	85%	84%	74%	84%	88%	75%	
	Travel Guidebook-Bookstore	51%	53%	54%	40%	43%	60%	63%	51%	51%	40%	50%	53%	
	Travel Agent Brochure	40%	46%	26%	20%	57%	47%	50%	37%	53%	44%	50%	36%	
	Magazine (Consumer)	38%	34%	40%	60%	57%	20%	44%	38%	40%	36%	25%	33%	
	Friend/ Relative	38%	22%	23%	10%		33%	35%	42%	23%	20%	50%	26%	
	Prior Trip	30%	48%	46%	20%	43%	33%	25%	26%	51%	72%	38%	95%	
	TV	19%	22%	14%	10%	43%	20%	24%	18%	15%	24%	38%	18%	
	Co-Worker/ Company Trvl Dept	3%	3%	11%			7%	3%	3%	6%		13%	5%	
	Consumer Trvl Show	3%	2%			14%		5%	3%	2%			3%	
	GVB Office	1%						1%	1%	2%			1%	
	Newspaper	1%	1%			14%		2%	1%				2%	
	Other	1%						1%	1%					
	Radio	1%							1%				1%	
	Travel Trade Show	0%							0%					
	Total	Count	351	87	35	20	7	15	100	287	53	25	8	113

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$737.27

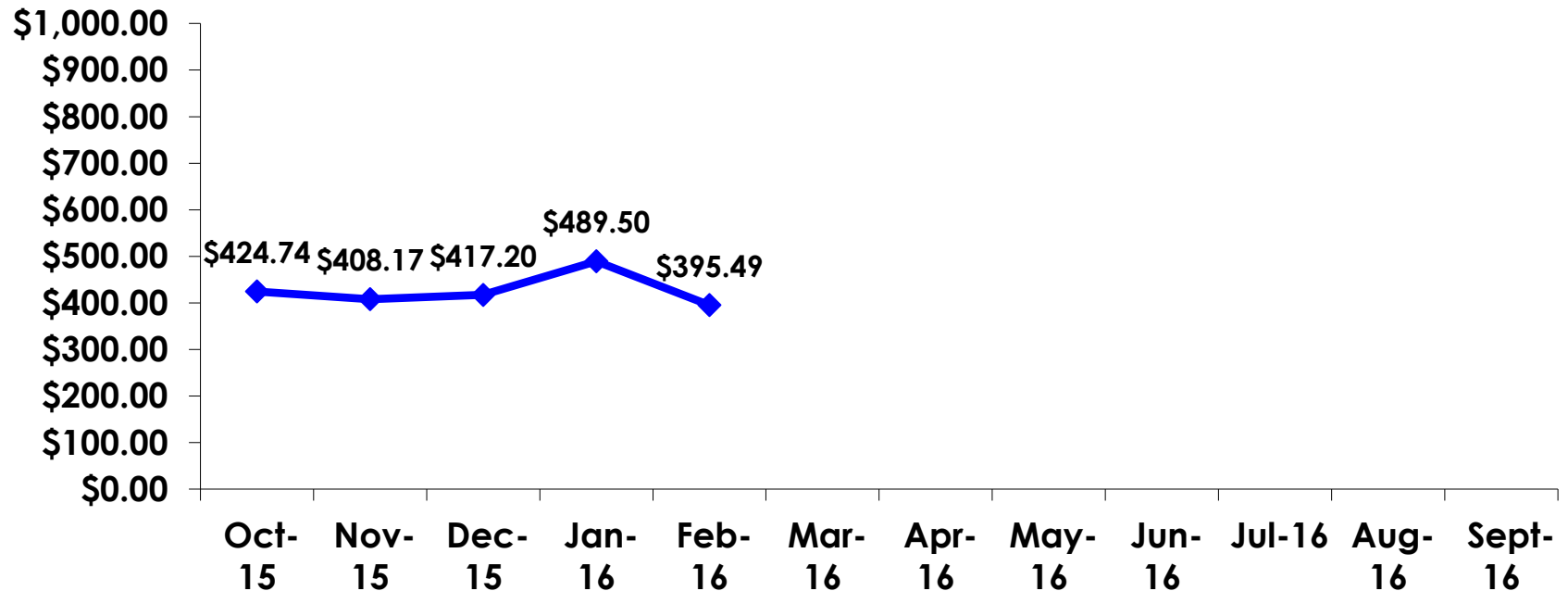
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$779.74	\$1,117.34	\$961.26	\$341.29	\$1,268.54	\$1,425.63	\$893.38	\$739.12	\$903.02	\$1,095.63	\$2,314.50	\$720.47
	Median	\$687	\$859	\$859	\$258	\$859	\$1,116	\$687	\$644	\$744	\$802	\$1,932	\$693
	Minimum	\$0	\$0	\$301	\$0	\$558	\$0	\$0	\$0	\$0	\$125	\$687	\$0
	Maximum	\$8,245	\$8,245	\$2,576	\$1,231	\$3,092	\$4,723	\$8,245	\$8,245	\$3,650	\$8,245	\$4,723	\$1,503

PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,145.67	\$2,376.28	\$1,543.28	\$593.09	\$9,876.33	\$4,141.38	\$1,140.67	\$1,003.67	\$1,556.71	\$3,322.11	\$4,311.23	\$1,449.39
	Median	\$687	\$1,718	\$859	\$485	\$9,876	\$2,233	\$687	\$687	\$1,116	\$2,147	\$3,435	\$859
AIR/ HOTEL/ MEAL	Mean	\$2,859.84	\$3,491.07	\$2,776.82	\$3,692.89	\$3,246.31	\$1,746.25	\$3,142.10	\$2,401.06	\$3,327.89	\$4,852.28	\$5,582.27	\$3,481.49
	Median	\$1,718	\$2,920	\$3,092	\$3,693	\$1,718	\$1,374	\$1,374	\$1,288	\$2,920	\$4,852	\$5,582	\$2,576
AIR ONLY	Mean	\$1,002.90	\$1,223.81	\$1,352.63	\$601.17	\$858.81	\$515.29	\$1,288.22	\$788.68	\$1,545.86	\$1,302.53	\$1,545.86	\$1,215.22
	Median	\$859	\$1,245	\$1,353	\$687	\$859	\$515	\$1,288	\$687	\$1,718	\$1,245	\$1,546	\$1,245
HOTEL ONLY	Mean	\$592.58	\$611.90	\$515.29	.	.	.	\$1,288.22	\$418.67	\$1,288.22	\$515.29	\$128.82	\$418.67
	Median	\$515	\$515	\$515	.	.	.	\$1,288	\$515	\$1,288	\$515	\$129	\$515
HOTEL & MEAL	Mean	\$858.81	\$858.81	.	.	.	.	.	.	\$858.81	.	.	\$858.81
	Median	\$859	\$859	.	.	.	.	.	.	\$859	.	.	\$859
F&B HOTEL	Mean	\$103.06	\$103.06	.	.	.	.	.	.	\$103.06	.	.	\$103.06
	Median	\$103	\$103	.	.	.	.	.	.	\$103	.	.	\$103
TRANS- JAPAN	Mean	\$50.48	\$111.65	\$25.76	\$42.94	\$42.94	\$42.94	\$88.71	\$39.95	\$97.33	\$171.76	\$51.53	\$76.00
	Median	\$43	\$52	\$26	\$43	\$43	\$43	\$34	\$34	\$43	\$43	\$52	\$43
TRANS- GUAM	Mean	\$48.61	\$58.40	\$20.61	.	.	.	\$46.38	\$49.32	\$46.95	.	\$85.88	\$67.56
	Median	\$26	\$58	\$21	.	.	.	\$21	\$21	\$31	.	\$86	\$86
OPT TOURS	Mean	\$226.76	\$450.02	\$142.56	.	\$174.62	\$489.52	\$258.14	\$176.30	\$409.59	\$944.69	\$279.11	\$268.49
	Median	\$155	\$429	\$86	.	\$86	\$429	\$139	\$140	\$344	\$859	\$279	\$172
OTHER	Mean	\$508.86	\$1,427.75	\$55.54	\$150.29	\$2,181.38	\$1,729.07	\$619.37	\$419.07	\$843.64	\$147.97	\$1,674.68	\$110.82
	Median	\$108	\$515	\$43	\$150	\$2,181	\$2,181	\$90	\$105	\$107	\$148	\$2,362	\$86
TOTAL	Mean	\$1,356.48	\$2,579.83	\$1,680.62	\$617.00	\$4,948.90	\$3,315.01	\$1,551.34	\$1,117.95	\$1,979.05	\$3,242.74	\$4,628.99	\$1,630.25
	Median	\$790	\$1,718	\$859	\$412	\$2,491	\$1,718	\$859	\$687	\$1,417	\$2,405	\$3,865	\$945

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$427.01

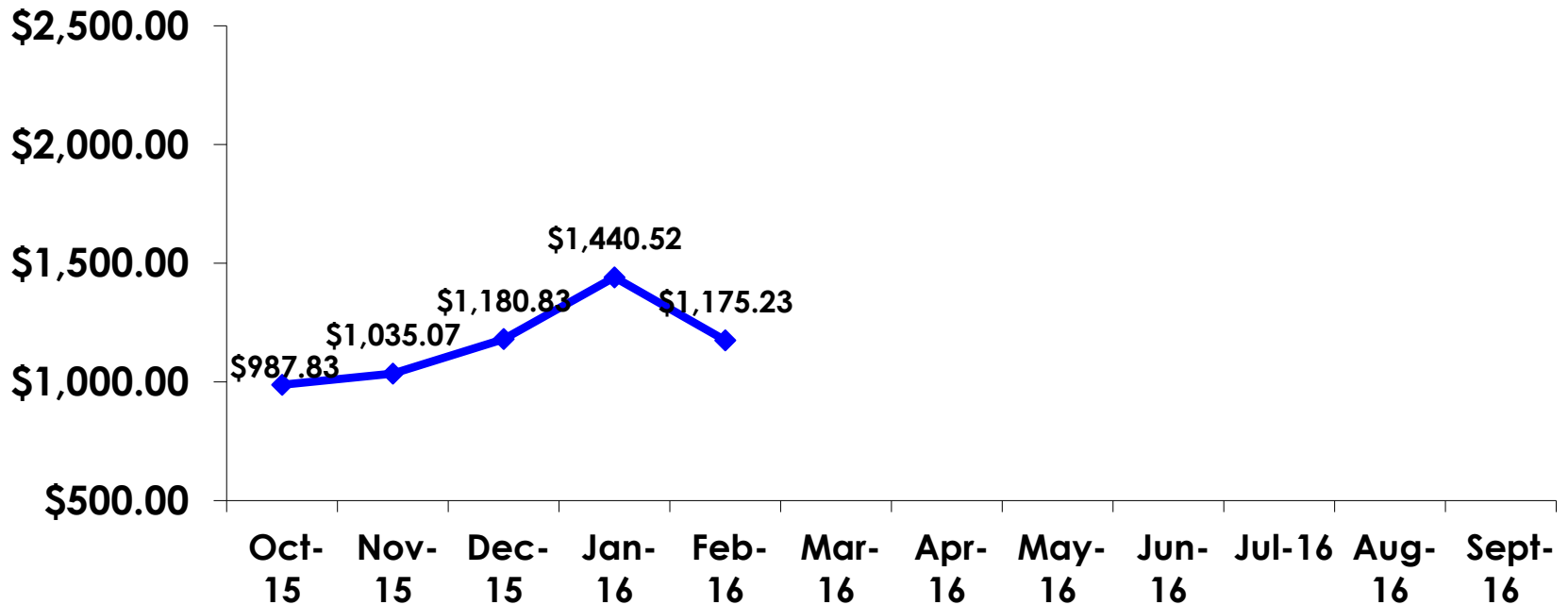
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$395.49	\$426.10	\$765.05	\$270.37	\$500.15	\$369.25	\$396.59	\$366.49	\$510.19	\$415.26	\$486.44	\$491.10
	Median	\$350	\$333	\$500	\$200	\$500	\$350	\$400	\$338	\$348	\$333	\$500	\$400
	Minimum	\$0	\$0	\$0	\$0	\$285	\$25	\$0	\$0	\$0	\$0	\$90	\$0
	Maximum	\$6,800	\$2,300	\$6,800	\$700	\$641	\$1,000	\$2,300	\$2,300	\$6,800	\$1,250	\$1,143	\$6,800

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	\$27.92	\$65.16	\$59.06	\$9.76	\$187.50	\$111.00	\$33.85	\$18.34	\$46.70	\$46.16	\$80.00	\$34.88
F&B FF/STORE	Mean	\$31.84	\$46.16	\$27.43	\$27.10	\$33.88	\$73.53	\$32.23	\$29.52	\$33.33	\$32.00	\$93.33	\$42.40
F&B RESTRNT	Mean	\$75.64	\$133.63	\$72.00	\$44.90	\$72.50	\$138.67	\$84.17	\$59.74	\$161.85	\$196.40	\$186.67	\$96.48
OPT TOUR	Mean	\$59.86	\$85.69	\$86.86	\$10.24	\$107.50	\$36.67	\$72.62	\$53.48	\$91.30	\$71.60	\$244.44	\$63.68
GIFT- SELF	Mean	\$109.50	\$220.61	\$266.43	\$28.33	\$93.75	\$60.00	\$126.97	\$92.14	\$143.98	\$166.00	\$70.67	\$165.07
GIFT- OTHER	Mean	\$80.56	\$145.60	\$123.74	\$34.95	\$331.63	\$193.53	\$85.09	\$57.90	\$152.59	\$146.00	\$74.44	\$116.73
TRANS	Mean	\$8.46	\$15.09	\$6.26	\$4.57	\$1.50	\$10.67	\$12.63	\$6.57	\$19.83	\$22.96	\$18.89	\$12.89
OTHER	Mean	\$166.21	\$275.29	\$368.51	\$167.14	\$887.50	\$101.33	\$107.07	\$122.24	\$271.02	\$846.16	\$204.44	\$294.48
TOTAL	Mean	\$559.99	\$987.21	\$1,010.29	\$327.00	\$1,715.75	\$725.40	\$554.63	\$439.93	\$920.61	\$1,527.28	\$972.89	\$826.61

TOTAL EXPENDITURES – TRACKING



YTD=\$1,164.28

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	\$1,175.23	\$1,543.44	\$1,726.31	\$611.66	\$1,768.69	\$1,794.87	\$1,289.97	\$1,105.61	\$1,413.22	\$1,510.89	\$2,800.94	\$1,211.57
	Median	\$1,051	\$1,266	\$1,488	\$512	\$1,446	\$1,616	\$1,111	\$1,001	\$1,231	\$1,135	\$2,432	\$1,129
	Minimum	\$0	\$0	\$515	\$100	\$1,058	\$100	\$0	\$0	\$0	\$125	\$777	\$0
	Maximum	\$8,545	\$8,545	\$8,217	\$1,826	\$3,733	\$5,348	\$8,545	\$8,545	\$8,217	\$8,545	\$5,348	\$8,217

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 2016, and Overall Oct-2015 - Feb 2016						
	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Combine d Oct- 2015 - Feb 2016
Drivers:	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		8
Variety of daytime tours	5					
Quality of nighttime tours						
Variety of nighttime tours						
Quality of shopping		3			2	
Variety of shopping	2			5		3
Price of things on Guam				1		
Quality of hotel accommodations			2			5
Quality/cleanliness of air, sky			4			6
Quality/cleanliness of parks					1	
Quality of landscape in Tumon	1	1	1	3		1
Quality of landscape in Guam					4	
Quality of ground handler						7
Quality/cleanliness of transportation vehicles	3	2		4	3	2
% of Overall Satisfaction Accounted For	65.6%	46.7%	53.1%	45.9%	44.2%	47.3%

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 February 2016 Period. By rank order they are:
 - **Quality/cleanliness of parks,**
 - **Quality of shopping,**
 - **Quality/cleanliness of transportation vehicles, and**
 - **Quality of landscape in Guam.**
- With all four factors the overall r^2 is .442 meaning that **44.2% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2015, Jan, Feb 2016 and Overall Oct-2015-Feb 2016						
	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Combin ed Oct- 2015- Feb 2016
Drivers:	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						
Price of things on Guam				4		
Quality of hotel accommodations	1					
Quality/cleanliness of air, sky						
Quality/cleanliness of parks	2	1				3
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%	2.4%

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 February 2016 Period.