



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015 Market Segmentation

JANUARY 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 **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

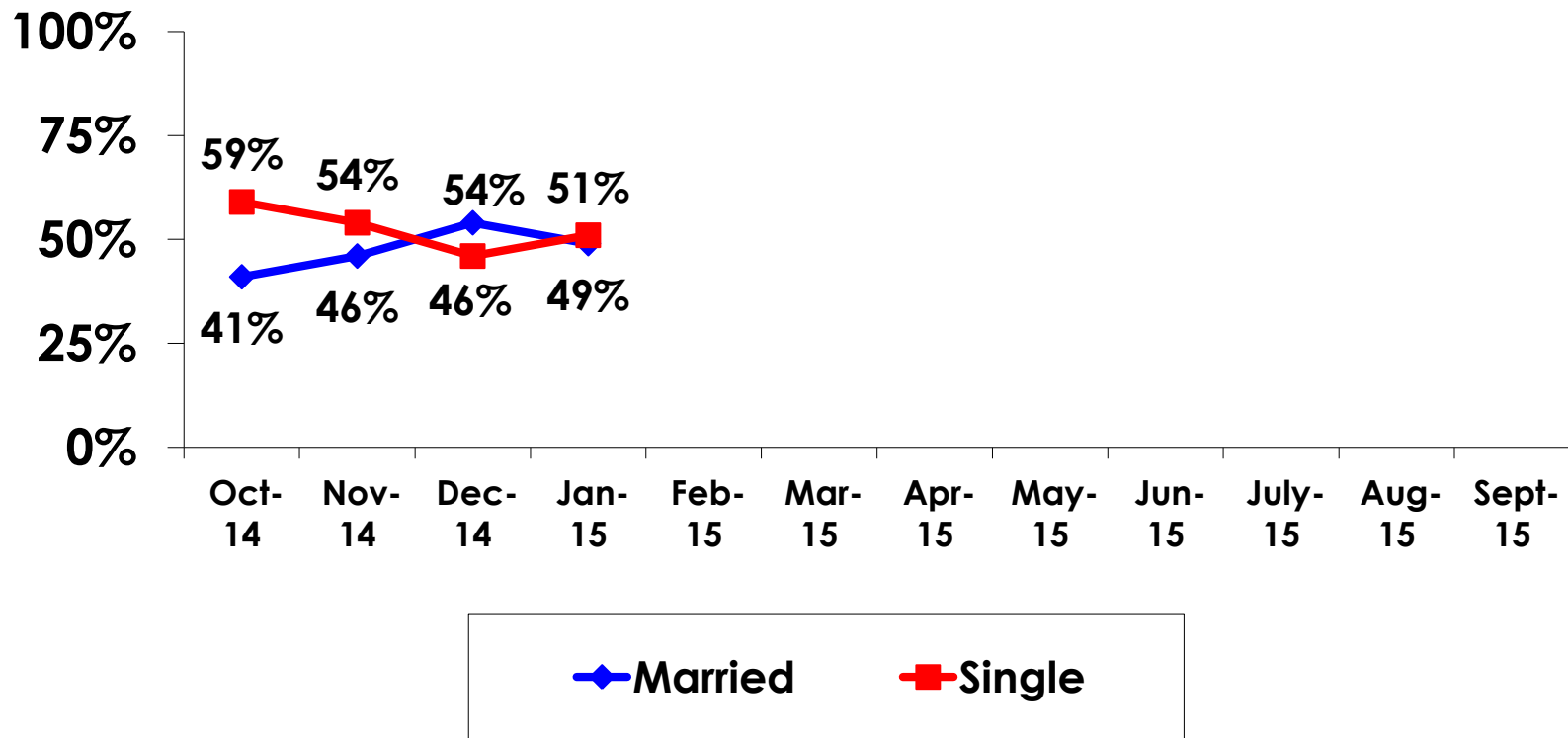
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

Highlighted Segments

	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	July 15	Aug 15	Sept 15
Families	36%	39%	59%	46%								
Office Lady	13%	11%	10%	12%								
Group	5%	3%	1%	4%								
Silver	2%	5%	3%	5%								
Wedding	9%	6%	0%	3%								
Sport	32%	29%	35%	27%								
18-35	71%	63%	48%	56%								
36-55	25%	29%	46%	36%								
Child	11%	12%	35%	19%								
Honey-moon	4%	5%	3%	4%								
Repeat	43%	43%	51%	50%								
TOTAL	351	350	351	350								

SECTION 1 **PROFILE OF RESPONDENTS**

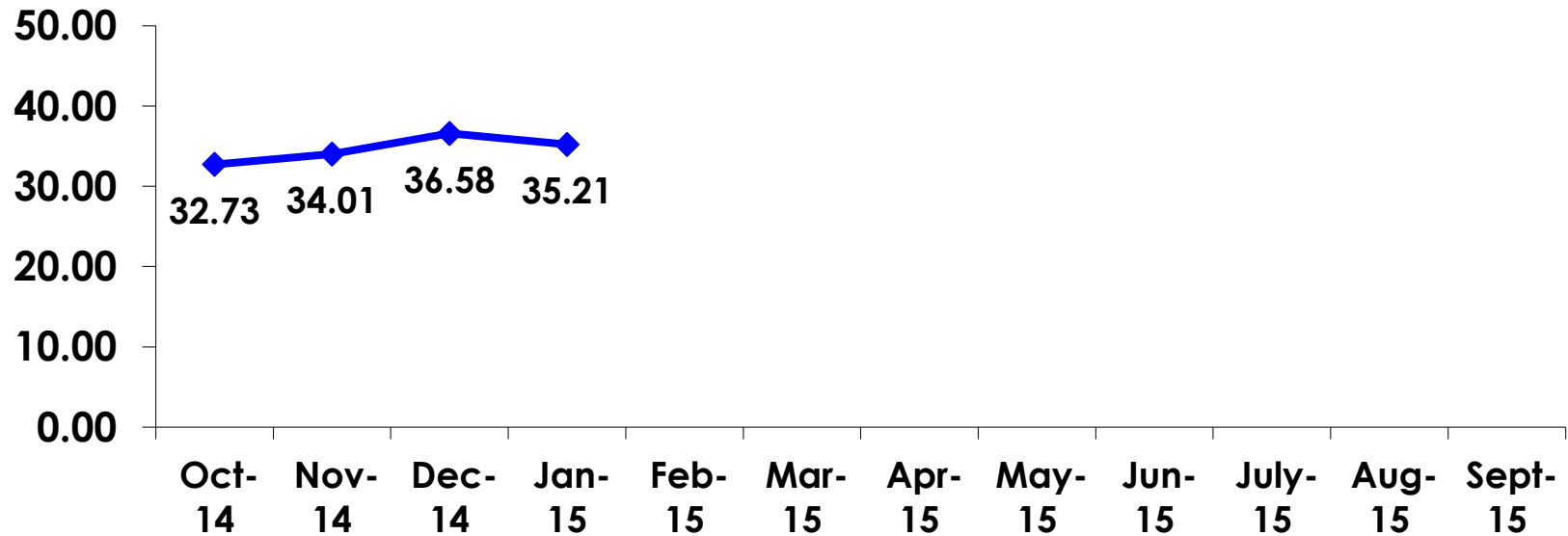
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	49%	87%	26%	64%	89%	60%	44%	23%	82%	95%	100%	62%
	Single	51%	13%	74%	36%	11%	40%	56%	77%	18%	5%		38%
	Total Count	350	162	43	14	18	10	95	197	125	66	14	175

AVERAGE AGE - TRACKING



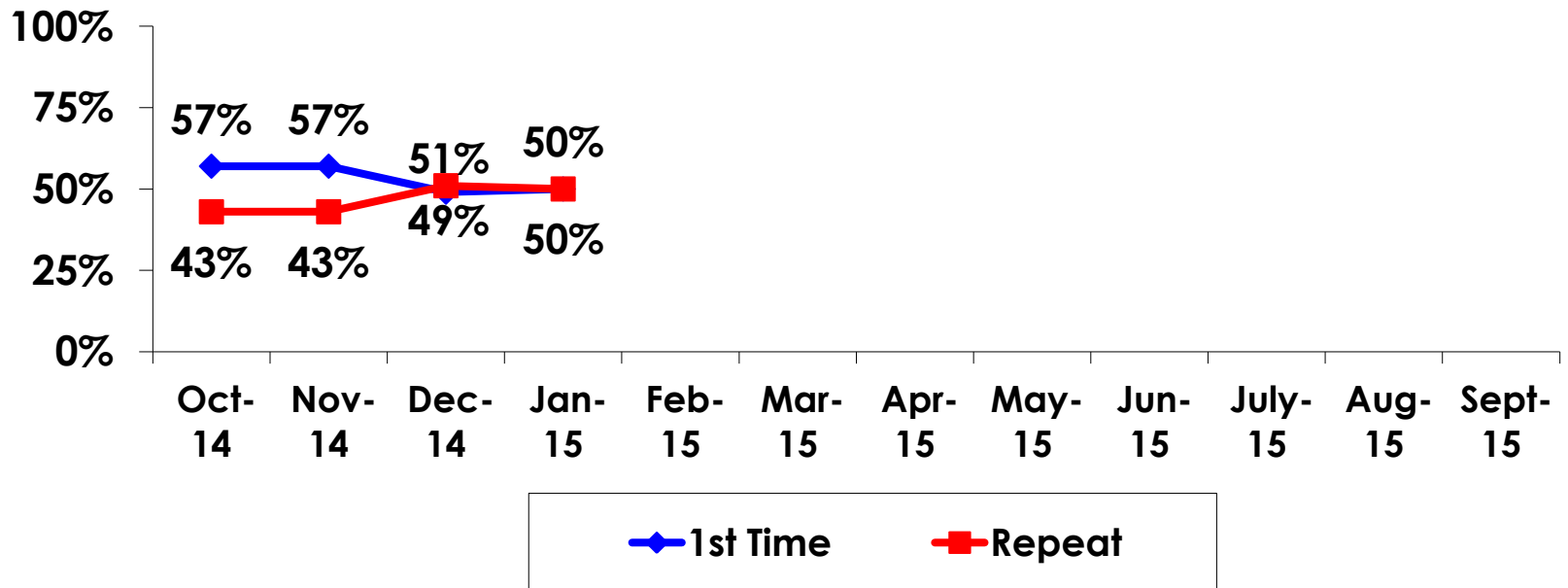
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	23%	4%	14%	14%		10%	29%	41%			14%	13%
	25-34	32%	25%	51%	14%		40%	32%	56%		12%	57%	25%
	35-49	31%	48%	28%	64%		40%	31%	3%	83%	74%	29%	43%
	50+	14%	22%	7%	7%	100%	10%	8%		17%	14%		19%
	Total Count	348	161	43	14	18	10	95	197	125	66	14	174
QF	Mean	35.21	41.73	32.88	38.43	65.28	34.90	32.98	26.01	43.98	42.45	30.29	39.29
	Median	32	41	29	39	64	35	29	25	43	41	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	4%	3%	2%	7%	7%	11%	5%	6%	3%		7%	4%
	Y2.0M-Y3.0M	14%	6%	24%	7%	7%	22%	13%	19%	8%	5%	21%	11%
	Y3.0M-Y4.0M	13%	7%	27%	14%	13%		16%	17%	8%	5%	7%	12%
	Y4.0M-Y5.0M	11%	11%	7%	21%	27%	11%	9%	9%	13%	17%		15%
	Y5.0M-Y7.0M	21%	25%	15%	29%	7%	11%	17%	20%	24%	28%	43%	19%
	Y7.0M-Y10.0M	16%	24%	12%	7%	7%	22%	17%	10%	24%	22%	21%	18%
	Y10.0M+	19%	22%	12%	7%	33%	22%	24%	17%	20%	23%		20%
	No Income	1%	1%		7%				2%				1%
	Total Count	316	147	41	14	15	9	88	181	112	60	14	159

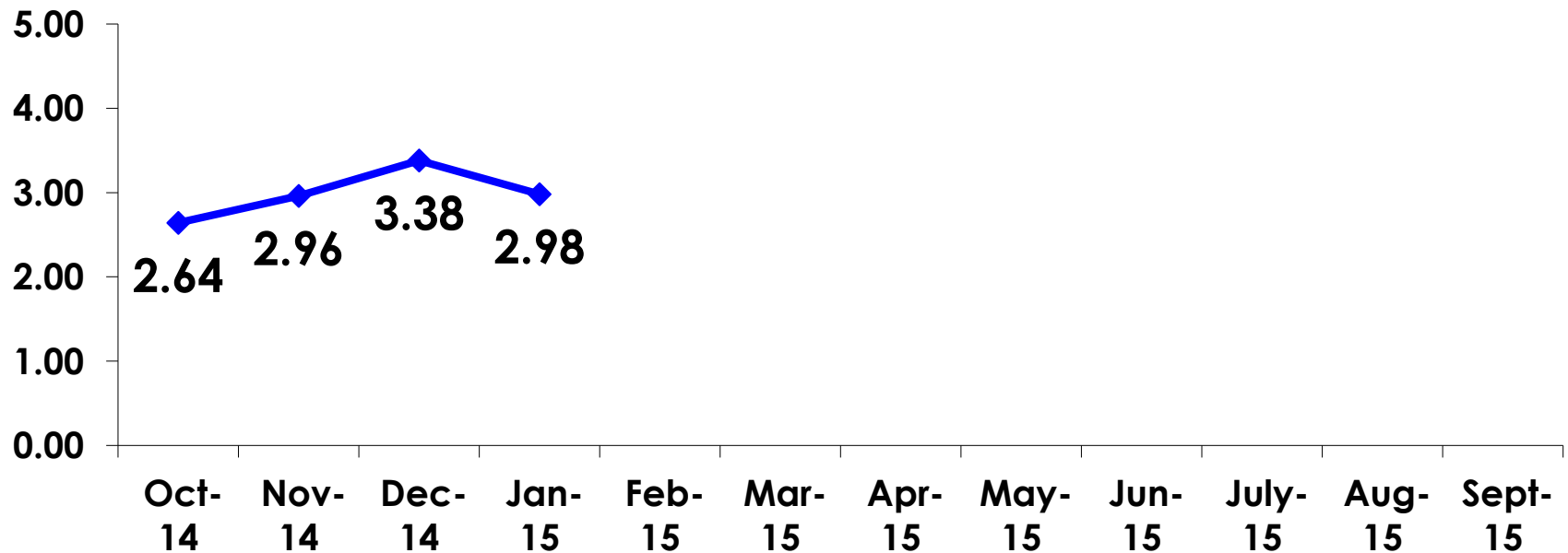
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q3A	Yes	50%	38%	58%	38%	29%	67%	53%	64%	34%	30%	64%		
	No	50%	62%	42%	62%	71%	33%	47%	36%	66%	70%	36%	100%	
	Total	Count	348	162	43	13	17	9	94	196	125	66	14	175

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	2.98	3.15	2.79	2.86	2.78	3.50	3.07	2.89	3.14	3.26	3.36	3.13
	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	62%	60%	66%		72%	44%	75%	65%	55%	58%	57%	62%
	Full package tour	23%	25%	15%		17%	44%	16%	23%	22%	18%	43%	17%
	Individually arranged travel (FIT)	8%	10%	5%		6%		7%	7%	10%	12%		12%
	Group tour	4%	4%	5%	100%	6%		2%	3%	6%	11%		5%
	Company paid travel	3%		10%					2%	5%			4%
	Other	1%	1%				11%			2%	2%		
	Total Count	346	161	41	14	18	9	95	193	125	66	14	174

TRAVEL MOTIVATION - SEGMENTATION

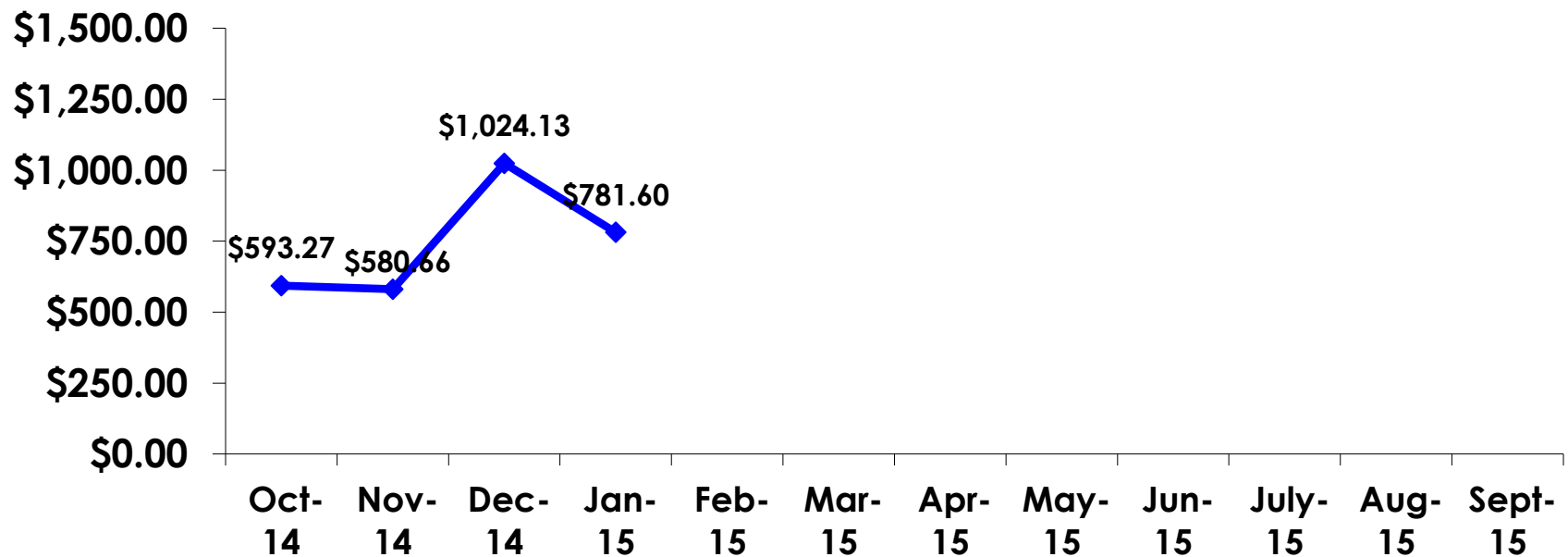
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	38%	49%	30%	50%	61%	30%	37%	27%	49%	55%	21%	75%	
	Price	21%	15%	26%	7%	22%	20%	29%	26%	15%	23%	7%	18%	
	Visit friends/ Relatives	3%	2%	2%				3%	4%	2%			3%	
	Recomm- friend/family/trvl agnt	20%	10%	19%	29%	22%		21%	27%	11%	11%	7%	10%	
	Scuba	5%	5%			6%		16%	5%	6%	3%	7%	6%	
	Water sports	19%	20%	16%	7%	11%		39%	20%	18%	24%	14%	15%	
	Short travel time	50%	58%	53%	14%	67%	20%	47%	45%	52%	59%	29%	51%	
	Golf	4%	4%	5%	7%	11%		9%	3%	5%	3%		6%	
	Relax	36%	36%	40%	7%	33%	20%	34%	37%	33%	33%	7%	38%	
	Company/ Business Trip	10%	4%	19%	36%	11%	10%	3%	6%	16%	8%		11%	
	Safe	24%	31%	21%	7%	22%		29%	20%	28%	35%	14%	30%	
	Natural beauty	60%	61%	65%	29%	61%	10%	66%	60%	58%	65%	14%	59%	
	Shopping	31%	23%	49%	7%	22%		38%	35%	24%	23%	14%	30%	
	Career Cert/ Testing	0%	1%						1%				1%	
	Married/ Attn wedding	3%	4%	5%			100%	2%	3%	3%	2%	7%	2%	
	Honeymoon	4%	8%	2%			10%	5%	6%	2%	2%	100%	3%	
	Pleasure	51%	52%	53%	21%	50%	10%	66%	52%	51%	59%	36%	47%	
	Organized sports	1%						1%	2%				2%	
	Other	3%	4%			11%	10%	3%	2%	3%	2%		5%	
	Total	Count	349	162	43	14	18	10	95	196	125	66	14	175

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	73%	68%	77%	58%	41%	90%	78%	81%	69%	69%	71%	63%	
	Travel Guidebook- Bookstore	44%	46%	49%	33%	35%	50%	48%	44%	44%	48%	21%	40%	
	Prior Trip	40%	49%	37%	58%	65%	20%	36%	28%	53%	58%	21%	80%	
	Travel Agent Brochure	37%	33%	47%	25%	35%	40%	40%	42%	30%	26%	50%	30%	
	Magazine (Consumer)	29%	29%	33%	25%	18%	10%	31%	28%	31%	32%	29%	25%	
	Friend/ Relative	28%	16%	23%	17%	12%	20%	30%	35%	21%	18%	36%	20%	
	TV	16%	16%	26%	8%	12%	10%	21%	15%	19%	18%		15%	
	Co-Worker/ Company Trvl Dept	6%	4%	12%				4%	7%	6%	5%		4%	
	Consumer Trvl Show	2%	1%					4%	3%	1%	2%		1%	
	GVB Promo	1%	2%	2%						2%	2%		1%	
	Newspaper	1%	1%			6%		1%	1%				1%	
	Other	1%				6%			1%				1%	
	Radio	1%	1%				10%	2%	1%	1%			1%	
	GVB Office	1%	1%			6%				1%	2%		1%	
	Travel Trade Show	0%							1%					
	Total	Count	347	161	43	12	17	10	94	196	124	65	14	174

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING

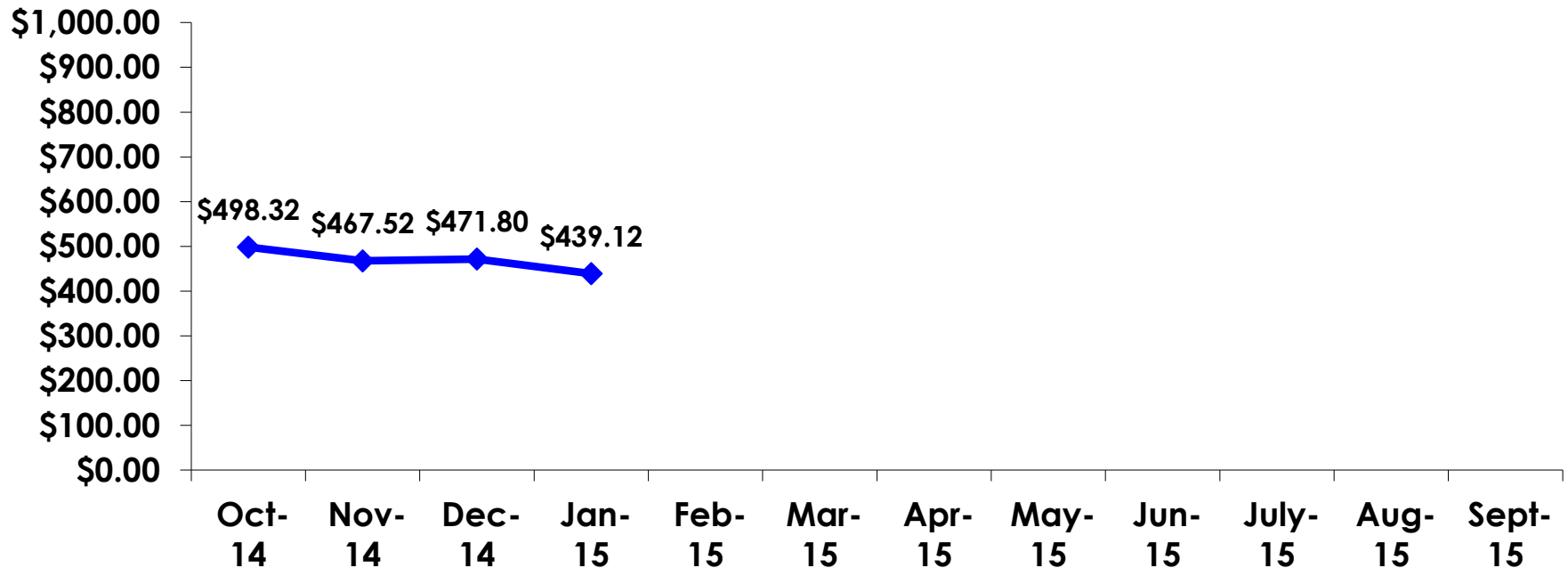


YTD=\$745.87

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	\$781.60	\$907.72	\$628.92	\$368.10	\$1,091.27	\$1,052.05	\$875.68	\$719.44	\$816.96	\$883.46	\$1,024.45	\$814.68
	Median	\$717	\$844	\$675	\$211	\$1,228	\$1,055	\$759	\$633	\$822	\$844	\$1,055	\$736
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,797	\$3,375	\$1,444	\$1,125	\$2,109	\$2,109	\$3,797	\$3,797	\$3,164	\$3,164	\$3,375	\$3,375

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$469.19

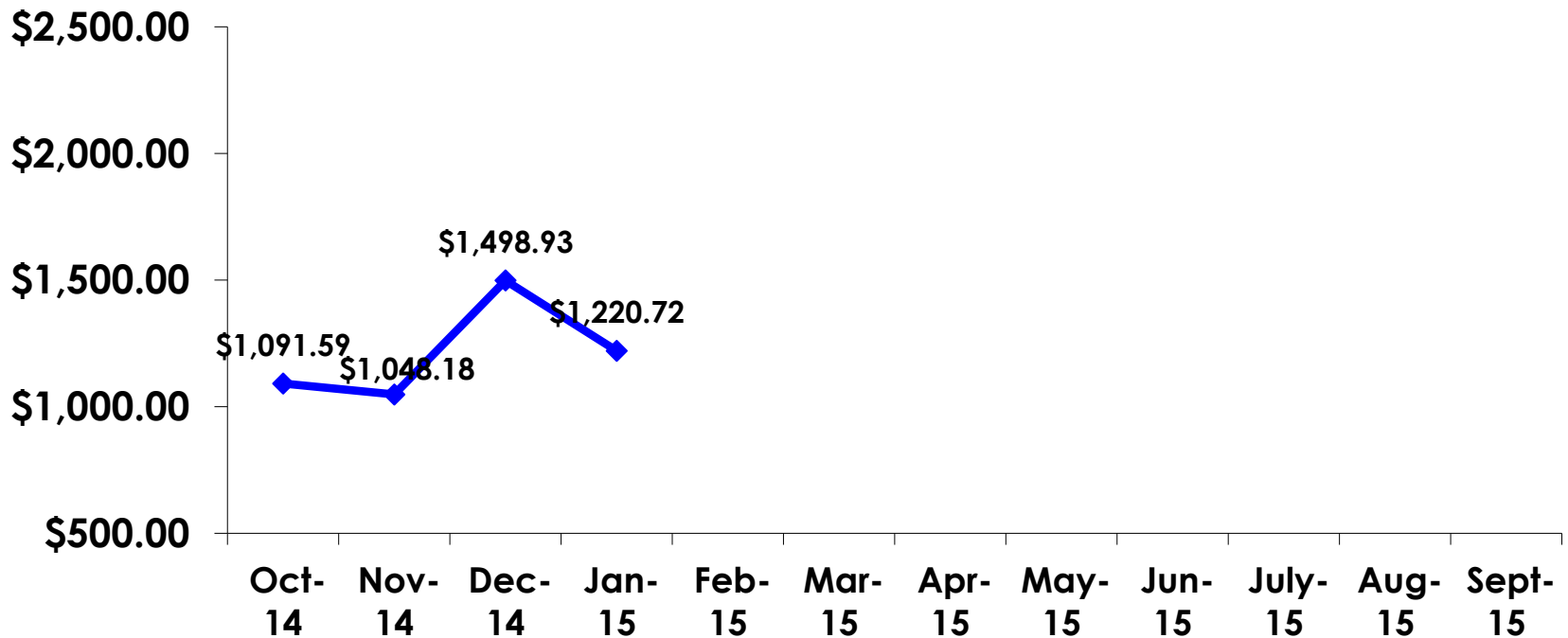
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$439.12	\$408.83	\$442.92	\$274.05	\$415.44	\$477.97	\$544.96	\$453.25	\$428.97	\$360.81	\$333.21	\$457.84
	Median	\$324	\$323	\$300	\$270	\$250	\$400	\$400	\$310	\$333	\$297	\$275	\$350
	Minimum	\$0	\$0	\$0	\$0	\$0	\$208	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,000	\$2,500	\$1,517	\$700	\$1,100	\$947	\$3,000	\$3,000	\$2,000	\$2,000	\$1,000	\$3,000

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	\$46.89	\$83.82	\$10.23	\$2.14	\$40.00	\$36.00	\$79.32	\$24.80	\$84.50	\$91.97	\$19.29	\$55.64
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$38.40	\$56.17	\$18.33	\$44.64	\$32.61	\$33.30	\$40.02	\$31.28	\$50.97	\$85.45	\$17.86	\$35.97
	Median	\$0	\$0	\$0	\$0	\$0	\$18	\$0	\$0	\$0	\$28	\$5	\$0
F&B RESTRNT	Mean	\$92.47	\$129.30	\$40.47	\$53.57	\$54.33	\$105.00	\$142.80	\$81.50	\$119.44	\$144.09	\$135.71	\$106.57
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$50	\$20	\$0	\$0	\$50	\$0
OPT TOUR	Mean	\$88.31	\$146.27	\$82.51	\$96.43	\$107.22	\$91.00	\$185.86	\$57.51	\$130.58	\$181.36	\$82.86	\$87.85
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$142.74	\$179.86	\$175.70	\$9.21	\$86.67	\$256.50	\$157.37	\$133.55	\$164.99	\$206.58	\$137.14	\$135.31
	Median	\$0	\$5	\$0	\$0	\$0	\$100	\$8	\$8	\$0	\$12	\$35	\$0
GIFT- OTHER	Mean	\$134.01	\$176.98	\$96.40	\$110.07	\$181.11	\$144.00	\$199.41	\$101.60	\$183.19	\$194.86	\$195.00	\$134.51
	Median	\$40	\$50	\$50	\$25	\$0	\$50	\$50	\$30	\$50	\$100	\$175	\$40
TRANS	Mean	\$14.87	\$23.25	\$5.60	\$2.86	\$2.78	\$25.00	\$20.61	\$9.81	\$25.77	\$33.77	\$16.57	\$17.10
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$209.40	\$246.63	\$155.40	\$172.86	\$298.06	\$289.00	\$177.44	\$164.77	\$261.00	\$249.48	\$62.00	\$269.22
	Median	\$0	\$0	\$0	\$0	\$230	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$778.65	\$1,069.25	\$584.63	\$492.50	\$799.44	\$979.80	\$1,036.89	\$603.19	\$1,055.89	\$1,254.70	\$666.43	\$846.57
	Median	\$500	\$800	\$500	\$350	\$600	\$800	\$500	\$400	\$700	\$900	\$550	\$600

TOTAL EXPENDITURES – TRACKING



YTD=\$1,215.06

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	\$1,220.72	\$1,316.54	\$1,071.84	\$642.15	\$1,506.71	\$1,530.02	\$1,420.64	\$1,172.68	\$1,245.93	\$1,244.26	\$1,357.67	\$1,272.51
	Median	\$1,100	\$1,205	\$1,103	\$678	\$1,536	\$1,370	\$1,197	\$1,041	\$1,176	\$1,126	\$1,285	\$1,196
	Minimum	\$0	\$0	\$0	\$0	\$200	\$208	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,242	\$5,242	\$2,023	\$1,458	\$2,209	\$2,434	\$5,242	\$5,242	\$3,962	\$3,962	\$3,625	\$4,266

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 2014, Jan 2015, and Overall Oct-2014 - Jan 2015					
	Oct-14	Nov-14	Dec-14	Jan-15	Combin ed Oct- 2014 - Jan 2015
Drivers:	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks		3			4
Ease of getting around					
Safety walking around at night					
Quality of daytime tours		5	4		6
Variety of daytime tours					
Quality of nighttime tours					
Variety of nighttime tours					
Quality of shopping	3				2
Variety of shopping		4		2	
Price of things on Guam					
Quality of hotel accommodations			2		5
Quality/cleanliness of air, sky					
Quality/cleanliness of parks		1			
Quality of landscape in Tumon	2				
Quality of landscape in Guam		2	1	1	1
Quality of ground handler	1				7
Quality/cleanliness of transportation vehicles			3	3	3
% of Overall Satisfaction Accounted For	47.0%	52.7%	37.9%	35.6%	42.4%
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 January 2015 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Variety of shopping, and**
 - **Quality/cleanliness of transportation vehicles.**
- With all three factors the overall r^2 is .356 meaning that **35.6% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2014, Jan 2015 and Overall Oct-2014-Jan 2015					
	Oct-14	Nov-14	Dec-14	Jan-15	Combined Oct-2014-Jan 2015
Drivers:	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks					
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					
Quality of shopping					
Variety of shopping					
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%	0.0%	0.0%
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 January 2015 Period.