



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2014 Market Segmentation

JULY 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 **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

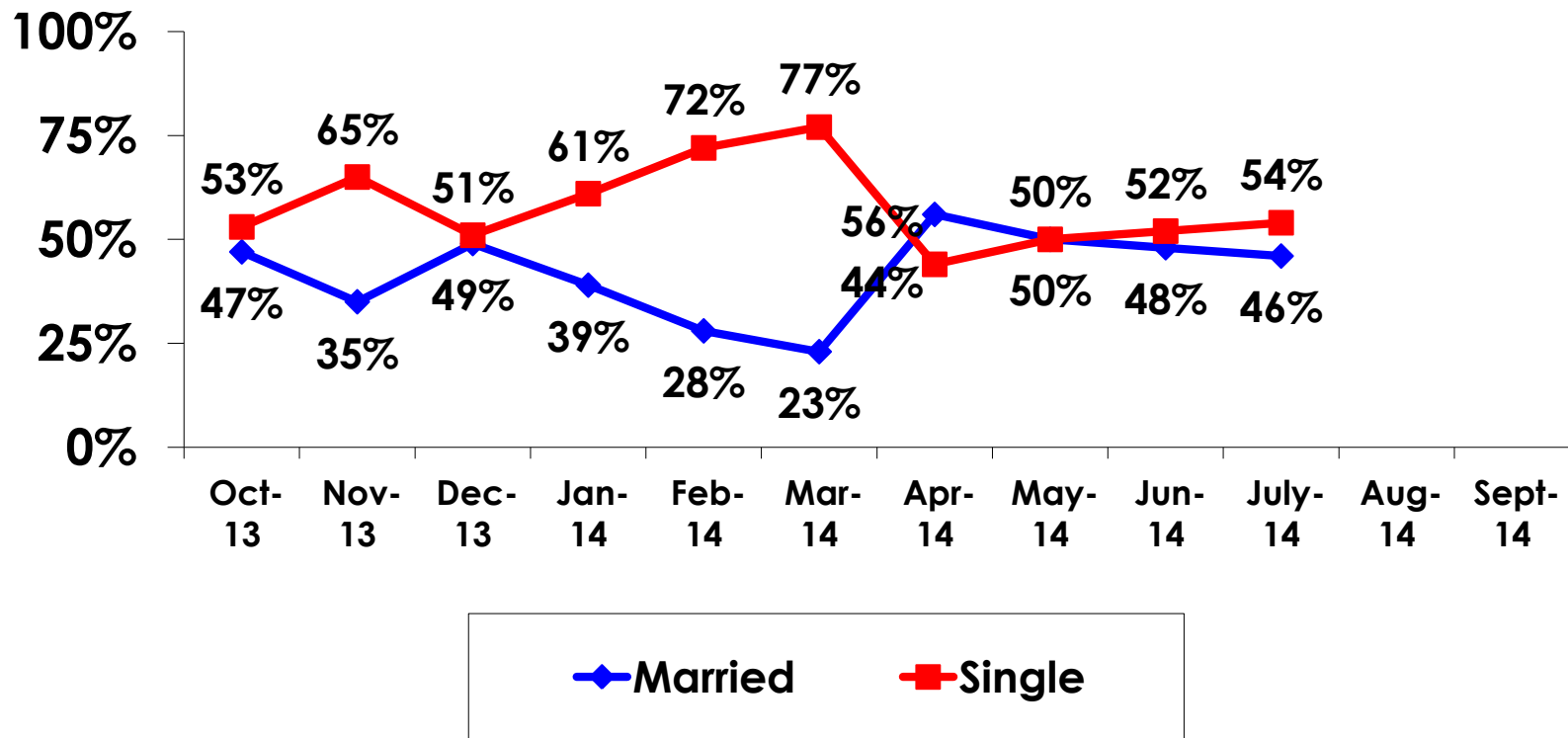
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

Highlighted Segments

	Oct 13	Nov 13	Dec 13	Jan 14	Feb 14	Mar 14	Apr 14	May 14	Jun 14	July 14	Aug 14	Sept 14
Families	39%	30%	45%	36%	25%	24%	52%	46%	40%	39%		
Office Lady	13%	12%	10%	15%	6%	5%	6%	14%	15%	15%		
Group	6%	5%	4%	3%	5%	6%	5%	9%	5%	6%		
Silver	2%	2%	4%	3%	1%	1%	5%	7%	9%	5%		
Wedding	8%	6%	4%	5%	3%	3%	5%	10%	5%	5%		
Sport	35%	40%	42%	35%	41%	43%	38%	33%	30%	27%		
18-35	64%	71%	61%	67%	78%	79%	50%	64%	61%	62%		
36-55	29%	24%	32%	27%	19%	19%	42%	26%	27%	29%		
Child	15%	9%	22%	14%	11%	13%	28%	11%	12%	13%		
Honeymoon	4%	3%	5%	2%	3%	1%	5%	5%	7%	4%		
Repeat	48%	43%	50%	43%	36%	28%	43%	49%	49%	54%		
TOTAL	351	350	350	350	351	351	350	350	351	351		

SECTION 1 **PROFILE OF RESPONDENTS**

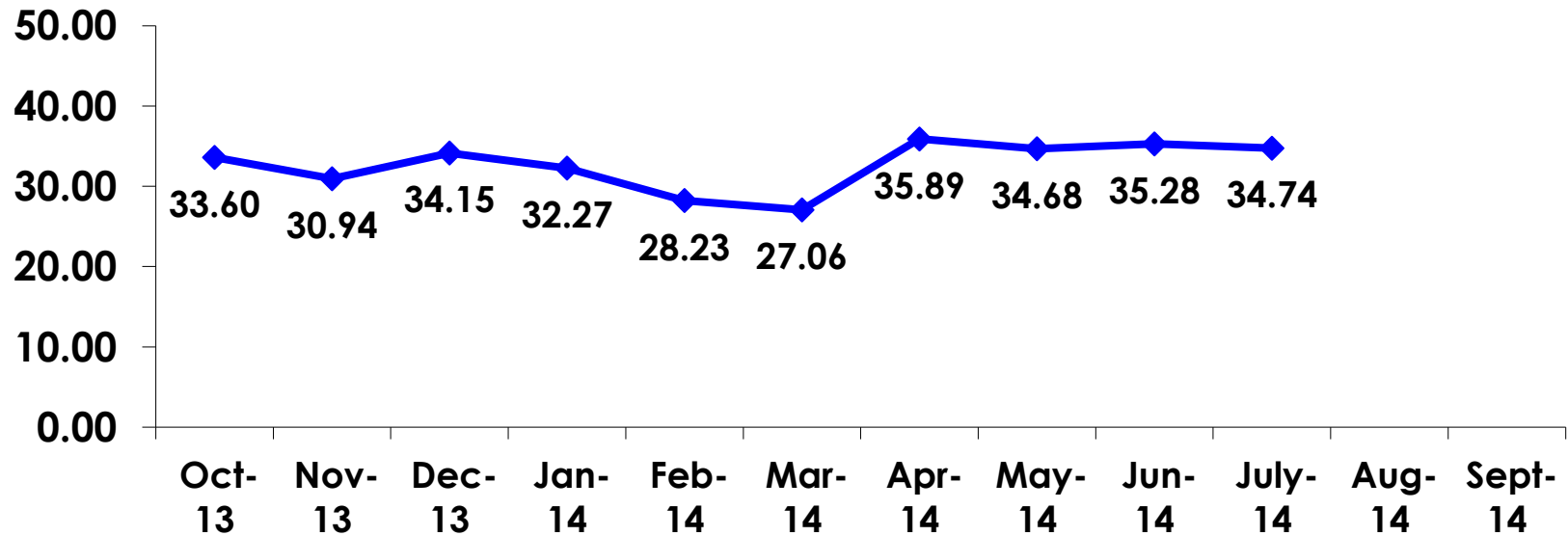
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	46%	82%	17%	55%	94%	63%	35%	29%	72%	100%	86%	52%
	Single	54%	18%	83%	45%	6%	38%	65%	71%	28%		14%	48%
	Total Count	351	137	53	22	17	16	95	218	101	45	14	188

AVERAGE AGE - TRACKING



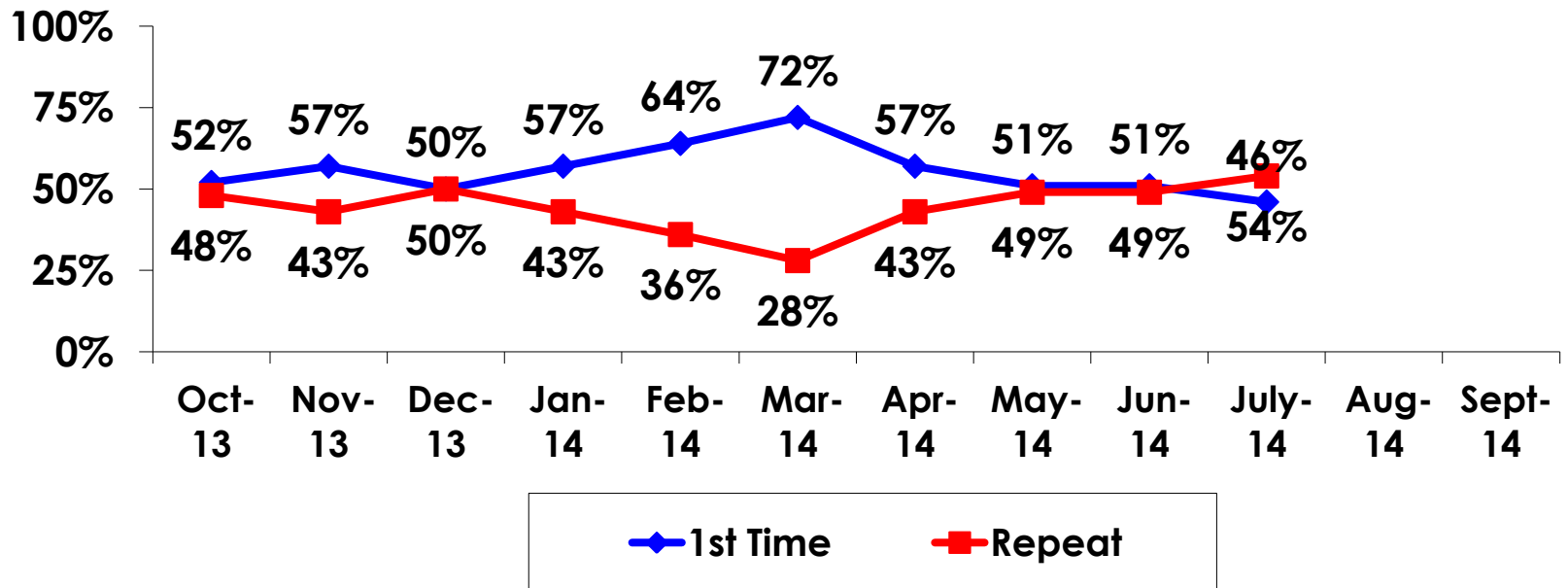
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	17%	6%	25%	5%		13%	19%	28%			7%	14%
	25-34	42%	39%	56%	45%		69%	47%	68%		24%	64%	34%
	35-49	27%	39%	17%	32%		6%	20%	5%	83%	73%	29%	32%
	50+	13%	17%	2%	18%	100%	13%	13%		17%	2%		20%
	Total Count	349	137	52	22	17	16	93	218	101	45	14	188
QF	Mean	34.74	38.25	29.33	38.73	62.53	33.44	33.74	27.47	42.81	37.98	31.57	37.45
	Median	31	36	28	35	61	29	29	27	41	36	31	35

INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q26	<Y2.0 million	6%	6%	4%	5%	12%		7%	6%	4%	2%	14%	5%	
	Y2.0M-Y3.0M	9%	2%	19%	18%	12%	6%	8%	13%			7%	5%	
	Y3.0M-Y4.0M	14%	8%	29%	18%			14%	18%	9%		21%	11%	
	Y4.0M-Y5.0M	24%	21%	19%	18%	47%	31%	24%	24%	21%	20%	14%	28%	
	Y5.0M-Y7.0M	23%	26%	13%	36%	18%	25%	24%	17%	36%	33%	21%	23%	
	Y7.0M-Y10.0M	13%	18%	10%	5%	12%	13%	15%	11%	16%	20%	14%	12%	
	Y10.0M+	11%	18%	6%			19%	7%	9%	15%	24%	7%	14%	
	No Income	1%	1%				6%		2%				2%	
	Total	Count	349	137	52	22	17	16	95	216	101	45	14	188

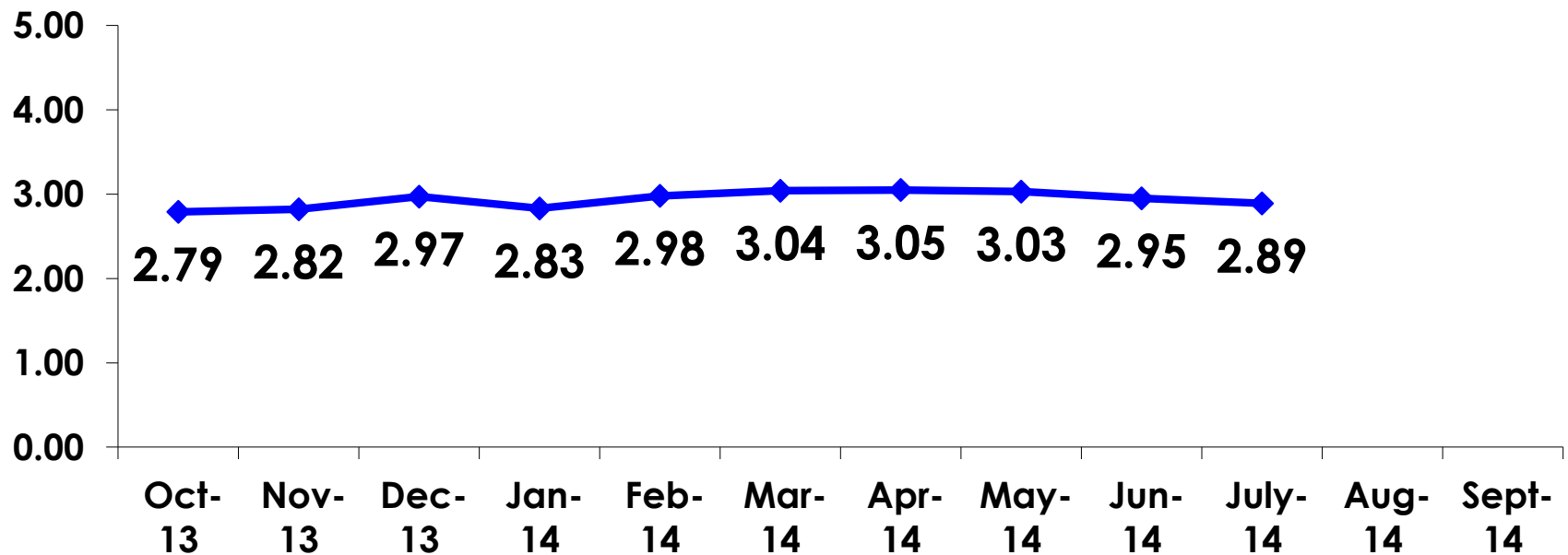
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	46%	41%	47%	41%	47%	69%	56%	56%	29%	38%	57%	
	No	54%	59%	53%	59%	53%	31%	44%	44%	71%	62%	43%	100%
	Total Count	351	137	53	22	17	16	95	218	101	45	14	188

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	2.89	3.09	2.66	2.77	3.06	3.38	2.96	2.78	3.03	3.20	3.64	2.90
	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%	64%	64%		53%	44%	65%	66%	55%	64%	64%	59%
	Full package tour	18%	20%	21%		24%	38%	17%	19%	14%	11%	21%	18%
	Individually arranged travel (FIT)	7%	11%	2%		6%	13%	6%	4%	15%	24%	7%	9%
	Group tour	6%	2%	6%	100%	12%		6%	6%	7%			7%
	Company paid travel	5%	1%	8%				3%	5%	5%			5%
	Other	2%	1%			6%	6%	2%	0%	4%		7%	3%
	Total Count	351	137	53	22	17	16	95	218	101	45	14	188

TRAVEL MOTIVATION - SEGMENTATION

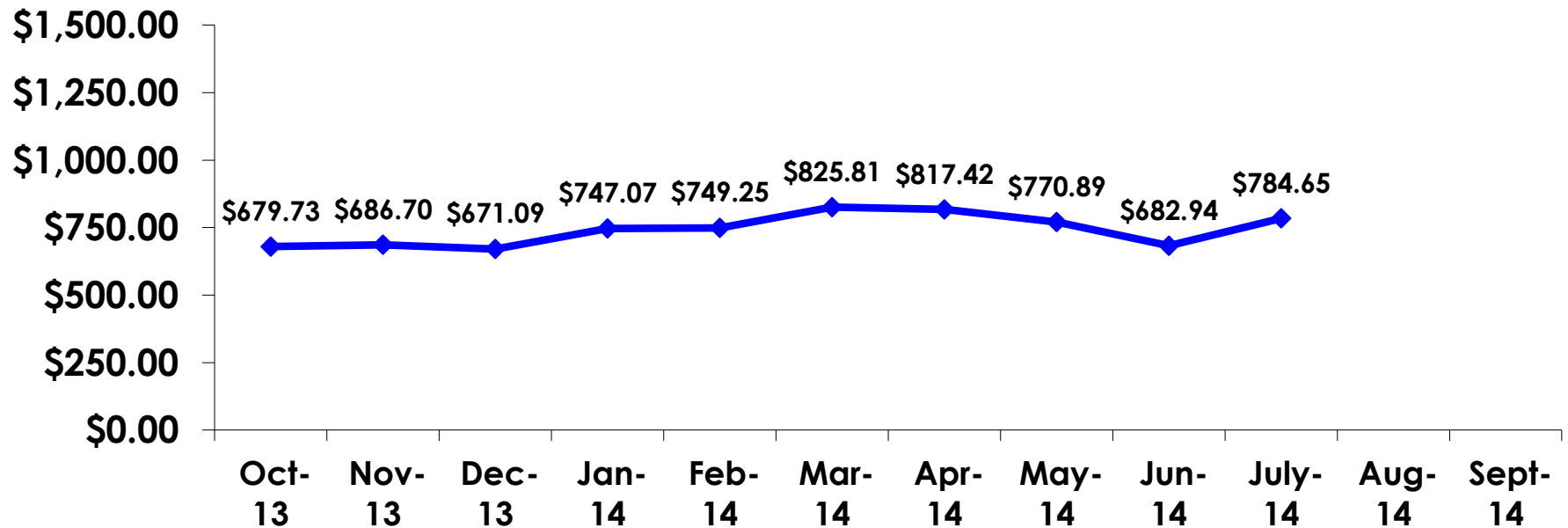
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	41%	49%	38%	50%	47%	19%	38%	32%	53%	56%	36%	76%
	Price	25%	19%	28%		18%	13%	24%	26%	24%	22%	14%	23%
	Visit friends/ Relatives	1%	1%	2%				2%	1%	2%	2%		2%
	Recomm- friend/family/trvl agnt	18%	13%	21%	9%	18%		19%	18%	16%	11%	7%	15%
	Scuba	7%	3%	6%				17%	7%	6%	2%		8%
	Water sports	13%	11%	15%	5%	24%	6%	24%	12%	10%	11%		14%
	Short travel time	49%	54%	45%	9%	35%	25%	50%	50%	50%	78%	21%	52%
	Golf	5%	1%		5%	6%		12%	1%	9%	2%		6%
	Relax	35%	36%	42%	5%	29%	6%	33%	35%	35%	44%	14%	36%
	Company/ Business Trip	12%	3%	15%	82%	6%		10%	13%	13%			12%
	Company Sponsored	1%	1%					1%	0%	1%	2%		1%
	Safe	25%	30%	23%	9%	24%	6%	31%	20%	33%	38%	29%	34%
	Natural beauty	53%	55%	55%	9%	59%	25%	64%	56%	43%	64%	50%	55%
	Shopping	33%	31%	42%		18%	6%	44%	36%	28%	31%	21%	38%
	Career Cert/ Testing	0%		2%					0%				
	Married/ Attn wedding	5%	8%			6%	100%	2%	6%	1%		29%	3%
	Honeymoon	4%	9%	2%			25%	3%	5%	4%		100%	3%
	Pleasure	44%	44%	55%	5%	53%	13%	47%	47%	34%	53%	29%	46%
	Organized sports	1%		2%				2%	2%	1%			1%
	Other	5%	7%	6%	9%	24%		3%	4%	5%	4%	7%	4%
	Total Count	350	137	53	22	17	16	94	217	101	45	14	188

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	77%	80%	83%	68%	24%	81%	76%	81%	78%	89%	93%	74%	
	Travel Guidebook- Bookstore	53%	55%	62%	55%	47%	50%	52%	55%	52%	49%	86%	48%	
	Prior Trip	44%	47%	49%	55%	35%	19%	36%	37%	60%	51%	36%	83%	
	Travel Agent Brochure	40%	39%	49%	41%	35%	38%	44%	42%	33%	40%	64%	32%	
	Magazine (Consumer)	37%	41%	55%	27%	24%	25%	44%	43%	29%	40%	64%	32%	
	Friend/ Relative	31%	23%	26%	23%	47%	31%	37%	36%	19%	27%	29%	24%	
	TV	8%	10%	6%	14%		19%	9%	7%	9%	7%	7%	7%	
	Co-Worker/ Company Trvl Dept	4%	1%	4%	18%	6%		5%	4%	6%	4%		2%	
	Consumer Trvl Show	3%	2%		9%	6%	13%	5%	5%	1%		7%	3%	
	Other	2%	1%					1%	1%	4%			3%	
	GVB Office	1%	1%					3%	1%	2%	2%		2%	
	Newspaper	1%						1%		2%			2%	
	Travel Trade Show	1%	1%					1%	1%		2%			
	Radio	1%					6%		0%	1%			1%	
	GVB Promo	0%								1%			1%	
	Total	Count	351	137	53	22	17	16	95	218	101	45	14	188

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING

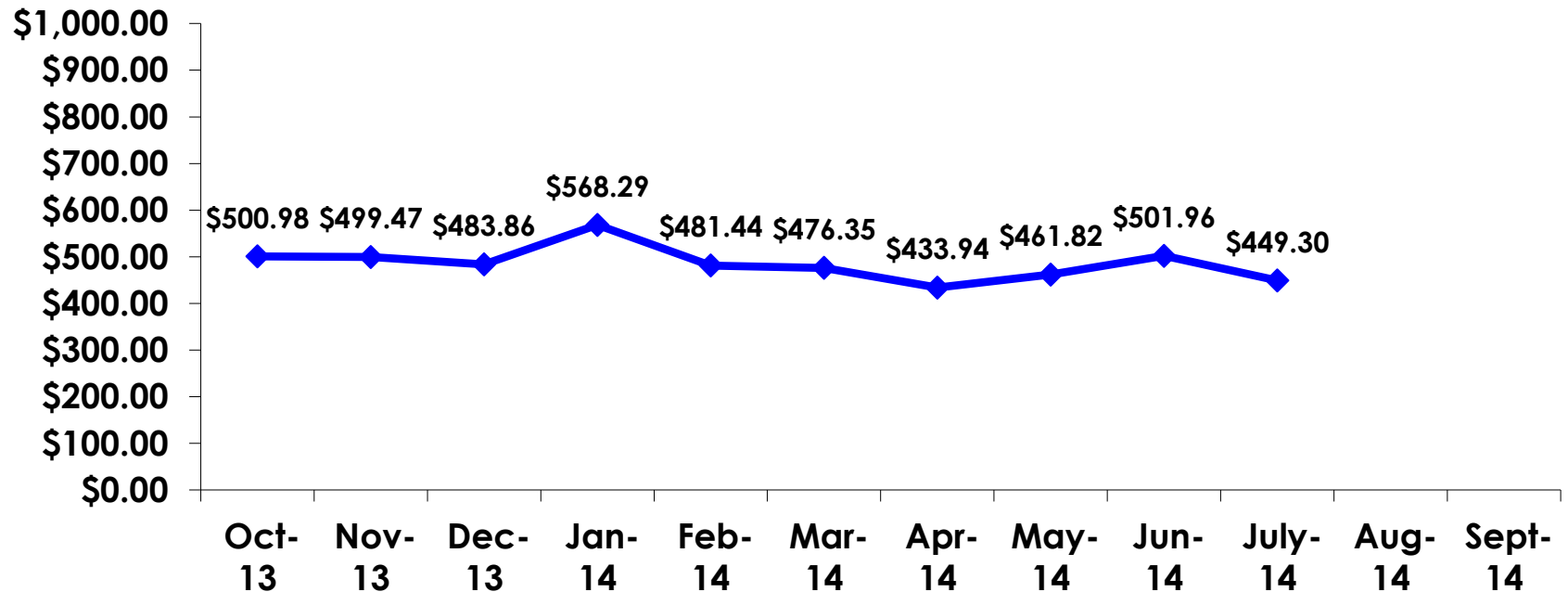


YTD=\$741.54

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	\$784.65	\$1,075.59	\$570.08	\$602.39	\$1,333.16	\$1,354.08	\$904.71	\$798.83	\$657.77	\$1,137.72	\$972.82	\$755.26
	Median	\$689	\$787	\$590	\$0	\$836	\$762	\$689	\$689	\$689	\$738	\$1,033	\$689
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$14,758	\$14,758	\$1,476	\$9,839	\$9,839	\$7,379	\$14,758	\$14,758	\$3,444	\$14,758	\$2,460	\$9,839

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$485.75

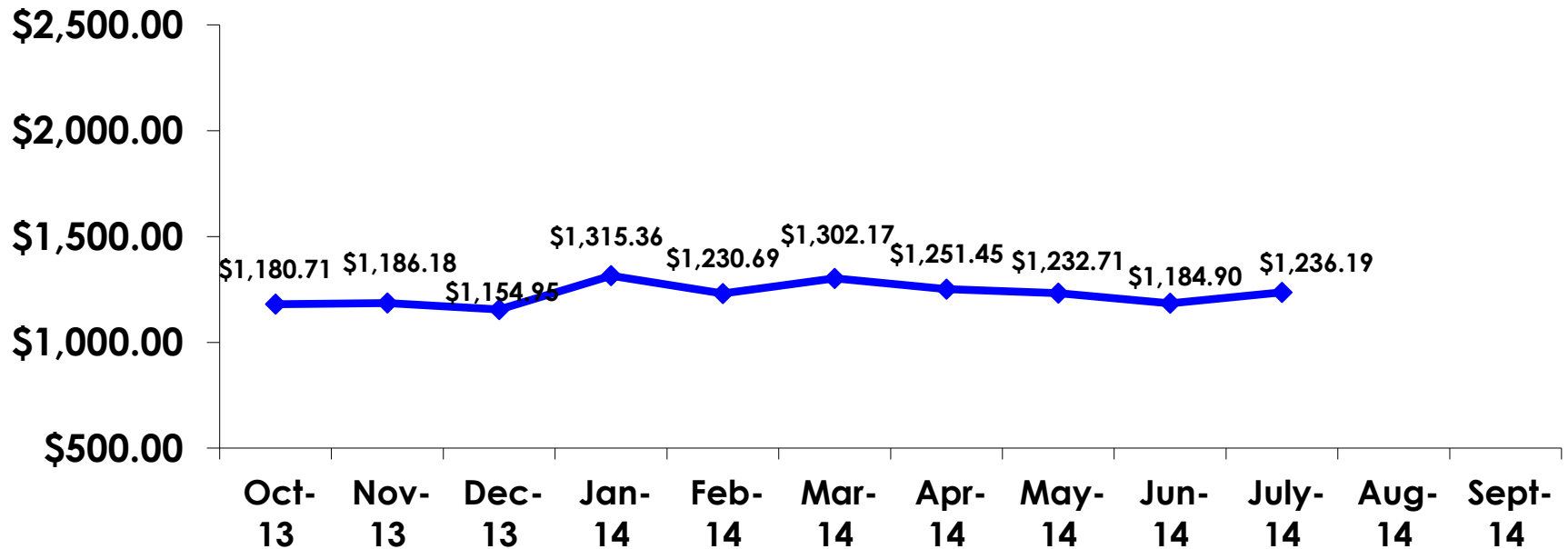
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$449.30	\$402.18	\$417.54	\$310.91	\$452.74	\$554.10	\$460.23	\$452.51	\$446.37	\$268.32	\$564.64	\$436.39
	Median	\$400	\$300	\$350	\$300	\$500	\$503	\$500	\$400	\$315	\$184	\$475	\$353
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$2,500	\$2,000	\$1,400	\$700	\$1,200	\$2,000	\$1,500	\$2,500	\$1,500	\$1,200	\$2,000	\$1,800

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	\$43.25	\$63.64	\$18.26	\$1.59	\$124.18	\$72.00	\$56.61	\$23.79	\$69.82	\$129.78	\$27.14	\$41.88
	Median	\$0	\$0	\$0	\$0	\$0	\$25	\$0	\$0	\$0	\$50	\$0	\$0
F&B FF/STORE	Mean	\$29.19	\$39.74	\$13.45	\$21.00	\$42.47	\$59.38	\$27.51	\$23.92	\$37.29	\$44.47	\$50.71	\$30.31
	Median	\$8	\$20	\$0	\$0	\$17	\$50	\$0	\$0	\$20	\$30	\$50	\$10
F&B RESTRNT	Mean	\$100.70	\$136.91	\$63.92	\$64.32	\$93.24	\$100.00	\$121.14	\$86.56	\$133.27	\$135.22	\$142.86	\$109.14
	Median	\$53	\$100	\$30	\$50	\$35	\$100	\$70	\$50	\$100	\$100	\$100	\$60
OPT TOUR	Mean	\$81.40	\$88.36	\$27.83	\$47.73	\$86.18	\$99.06	\$150.93	\$65.74	\$94.70	\$72.44	\$58.57	\$86.01
	Median	\$0	\$0	\$0	\$0	\$0	\$65	\$80	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$188.57	\$260.71	\$151.06	\$36.82	\$196.06	\$181.88	\$188.02	\$161.89	\$252.32	\$188.11	\$317.36	\$195.06
	Median	\$50	\$50	\$100	\$0	\$23	\$100	\$50	\$50	\$80	\$0	\$117	\$50
GIFT- OTHER	Mean	\$123.06	\$163.91	\$80.19	\$52.73	\$200.00	\$237.50	\$131.05	\$104.99	\$150.64	\$122.31	\$219.36	\$131.81
	Median	\$80	\$100	\$50	\$40	\$100	\$65	\$100	\$50	\$100	\$100	\$100	\$70
TRANS	Mean	\$25.30	\$24.23	\$11.11	\$19.77	\$10.35	\$27.50	\$35.84	\$15.06	\$50.50	\$31.93	\$32.57	\$33.52
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$134.42	\$167.59	\$105.26	\$122.64	\$79.18	\$131.13	\$77.85	\$131.15	\$160.57	\$180.00	\$210.71	\$126.09
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$724.75	\$942.46	\$471.28	\$362.05	\$831.65	\$910.31	\$788.00	\$614.48	\$942.18	\$904.27	\$1,072.14	\$753.80
	Median	\$500	\$620	\$419	\$308	\$600	\$600	\$500	\$500	\$600	\$600	\$850	\$510

TOTAL EXPENDITURES – TRACKING



YTD=\$1,227.52

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	\$1,236.19	\$1,477.78	\$987.63	\$913.30	\$1,785.89	\$1,908.18	\$1,364.94	\$1,251.34	\$1,110.71	\$1,406.04	\$1,537.46	\$1,191.65
	Median	\$1,102	\$1,151	\$1,000	\$359	\$1,238	\$1,400	\$1,194	\$1,108	\$1,061	\$1,044	\$1,630	\$1,103
	Minimum	\$0	\$0	\$0	\$0	\$0	\$250	\$0	\$0	\$0	\$0	\$250	\$0
	Maximum	\$15,008	\$15,008	\$1,984	\$10,039	\$10,039	\$8,379	\$15,008	\$15,008	\$4,944	\$15,008	\$3,082	\$10,039

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 2013, Jan, Feb, Mar, Apr, May, Jun, Jul 2014, and Overall Oct-2013 - July 2014											
	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Combined Oct-2013 - Jul 2014
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks			3	4	2	1		4	5	3	3
Ease of getting around								3	1		8
Safety walking around at night											
Quality of daytime tours	2			3		4		6	4		6
Variety of daytime tours											
Quality of nighttime tours											
Variety of nighttime tours											
Quality of shopping	4		5				1		6		4
Variety of shopping				1						4	
Price of things on Guam				5	4	2		5			
Quality of hotel accommodations			2		3					2	5
Quality/cleanliness of air, sky	3	4			5						7
Quality/cleanliness of parks						5					10
Quality of landscape in Tumon	1	2									11
Quality of landscape in Guam			1	2	1	3	3	1	2	1	1
Quality of ground handler		1					2				9
Quality/cleanliness of transportation vehicles		3	4				4	2	3		2
% of Per Person On Island Expenditures Accounted For	45.2%	41.7%	47.4%	42.5%	52.4%	51.5%	35.8%	56.0%	45.0%	50.4%	46.6%

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 July 2014 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Quality of hotel accommodations,**
 - **Quality & cleanliness of beaches & parks, and**
 - **Variety of shopping.**
- With all four factors the overall r^2 is .504 meaning that **50.4% 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, May, Jun, Jul 2014
and Overall Oct-2013-Jul 2014**

	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Combined Oct- 2013- Jul 2014
Drivers:	rank	rank	rank	rank	rank	rank	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										2	
Variety of nighttime tours											2
Quality of shopping									1		1
Variety of shopping				1							
Price of things on Guam										1	
Quality of hotel accommodations											
Quality/cleanliness of air, sky											
Quality/cleanliness of parks											
Quality of landscape in Tumon								1			3
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%	0.0%	2.3%	3.5%	4.5%	1.3%

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 July 2014 Period. By rank order they are:
 - **Price of things on Guam, and**
 - **Quality of night time tours.**
- With these factors the overall r^2 is .045 meaning that **4.5% of per person on island expenditure is accounted for by these factors.**