



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2014 Market Segmentation

#### NOVEMBER 2013



**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

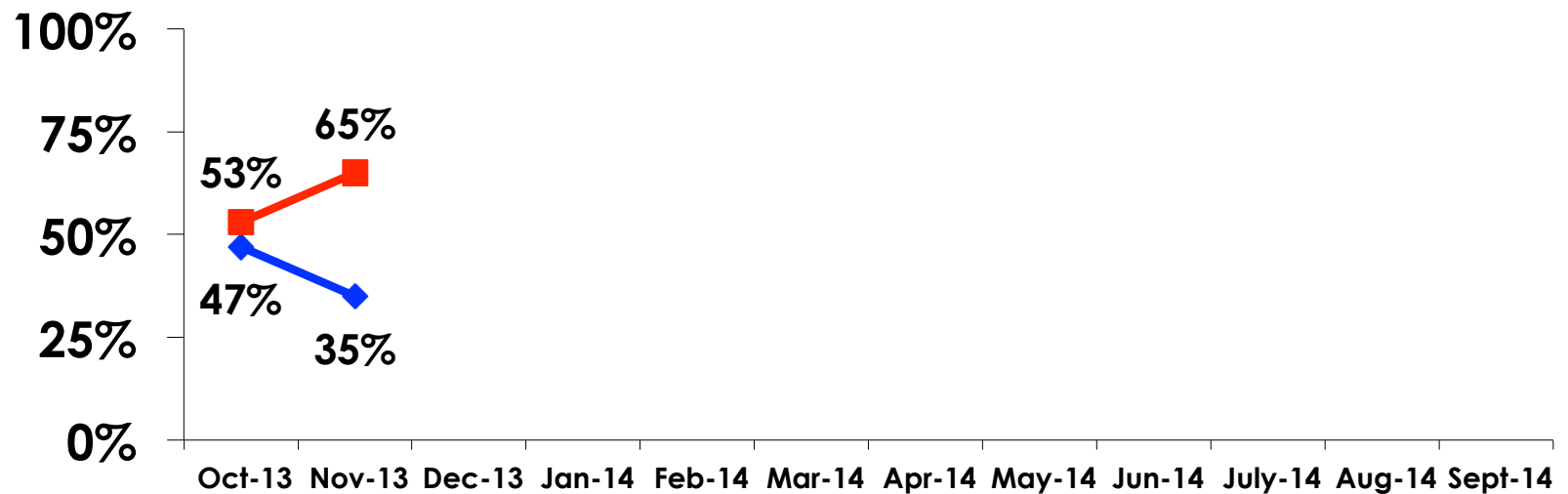
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

# 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
Families	39%	30%										
Office Lady	13%	12%										
Group	6%	5%										
Silver	2%	2%										
Wedding	8%	6%										
Sport	35%	40%										
18-35	64%	71%										
36-55	29%	24%										
Child	15%	9%										
Honeymoon	4%	3%										
Repeat	48%	43%										
<b>TOTAL</b>	<b>351</b>	<b>350</b>										

# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status Tracking



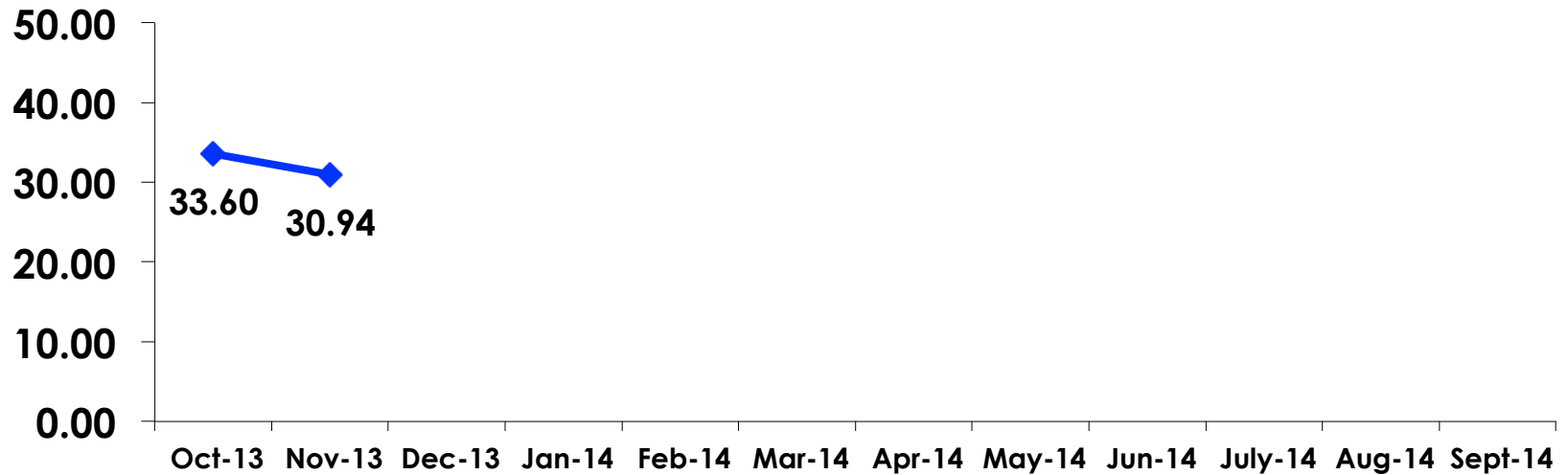
◆ Married    ■ Single

# Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	35%	88%	7%	38%	88%	65%	35%	19%	76%	94%	100%	42%
	Single	65%	13%	93%	63%	13%	35%	65%	81%	24%	6%		58%
	Total Count	347	104	43	16	8	20	139	246	84	32	9	149



# Average Age Tracking



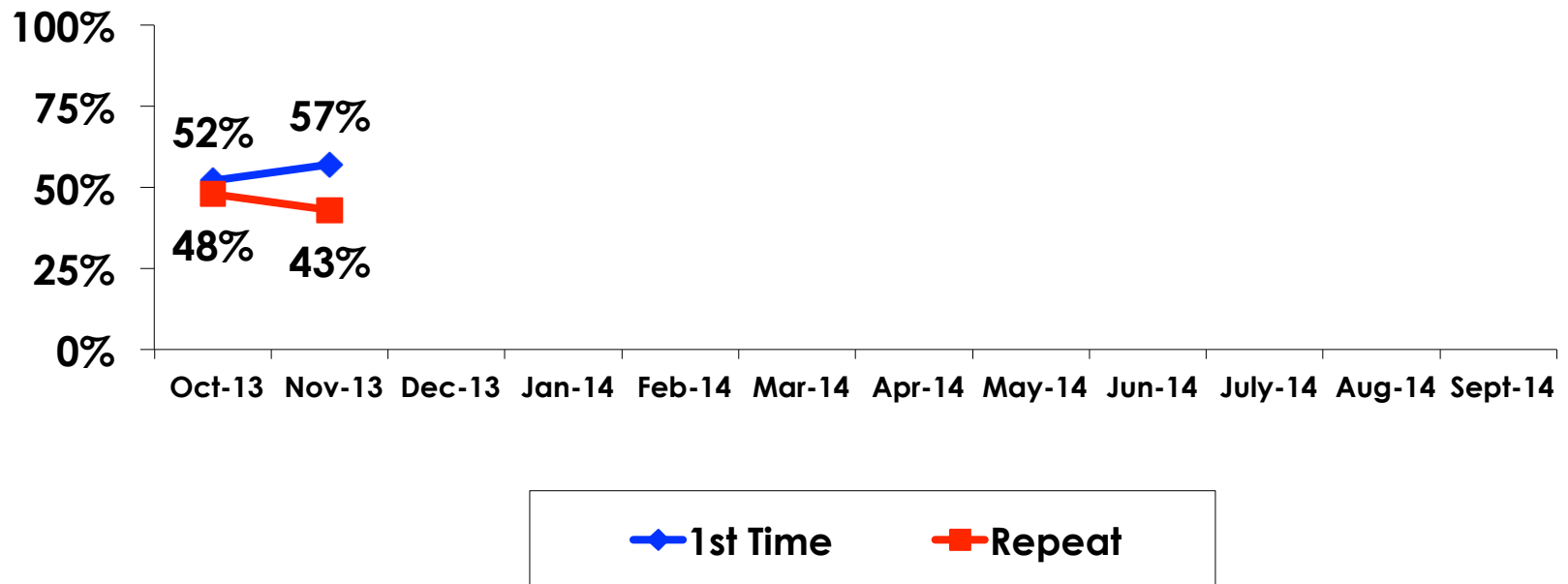
# Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	31%	6%	28%	56%		10%	32%	43%		3%	11%	19%
	25-34	40%	38%	58%	19%		62%	43%	56%		29%	67%	39%
	35-49	23%	43%	14%	13%		24%	15%	1%	90%	65%	22%	31%
	50+	6%	13%		13%	100%	5%	10%		10%	3%		11%
	Total Count	347	104	43	16	8	21	140	249	84	31	9	147
QF	Mean	30.94	37.62	27.84	30.06	63.13	32.48	30.84	25.45	42.29	37.58	30.78	34.52
	Median	28	37	26	22	62	29	27	25	41	38	31	31

# Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q26	<Y2.0 million	6%		3%	14%			8%	8%	1%			3%	
	Y2.0M-Y3.0M	13%	6%	28%	14%	14%	5%	14%	17%	5%	13%		8%	
	Y3.0M-Y4.0M	17%	12%	23%		29%	26%	19%	18%	10%	3%	33%	14%	
	Y4.0M-Y5.0M	15%	15%	5%	21%		21%	10%	15%	18%	26%	11%	17%	
	Y5.0M-Y7.0M	18%	24%	13%	7%	29%	32%	12%	16%	22%	16%	33%	18%	
	Y7.0M-Y10.0M	14%	20%	18%	21%	29%	11%	14%	10%	19%	26%	22%	18%	
	Y10.0M+	14%	20%	10%				17%	10%	23%	13%		20%	
	No Income	4%	2%		21%		5%	5%	5%		3%			
	Total	Count	309	99	39	14	7	19	121	217	77	31	9	132

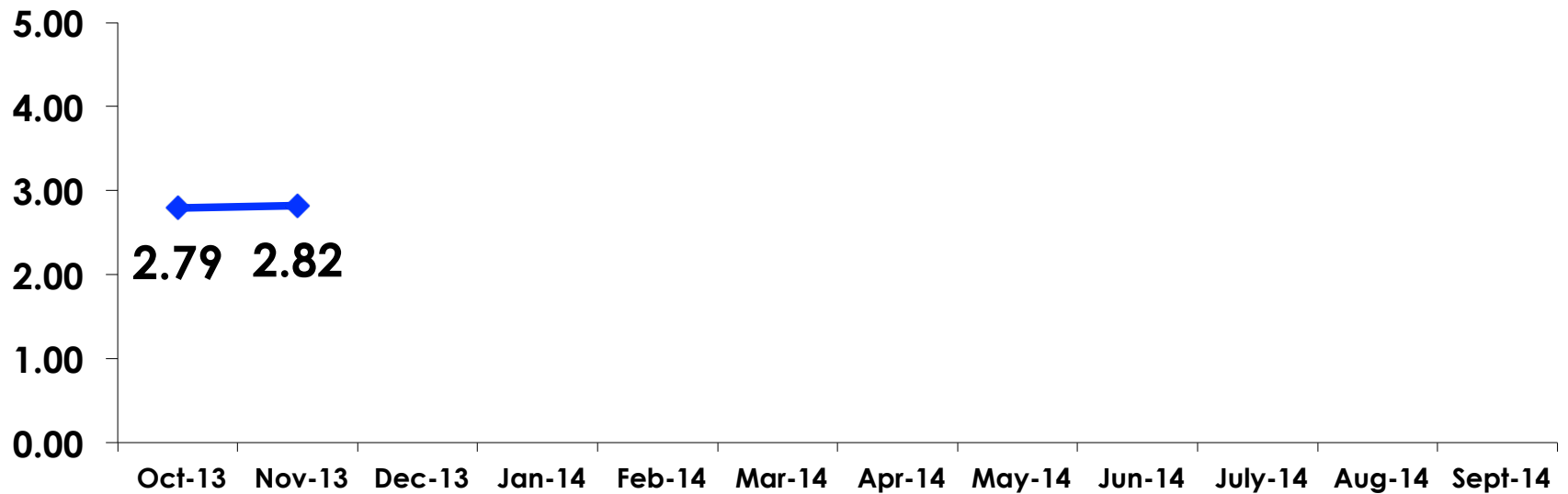
# Prior Trips to Guam Tracking



# 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%	55%	57%	56%	50%	62%	58%	65%	38%	44%	89%	
	No	43%	45%	43%	44%	50%	38%	42%	35%	62%	56%	11%	100%
	Total Count	349	105	42	16	8	21	139	248	84	32	9	149

# Average Length of Stay Tracking



# Average Length of Stay Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q8	Mean	2.82	2.96	2.95	2.88	3.63	3.38	2.91	2.76	2.92	3.00	3.67	2.85
	Median	3	3	3	3	4	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%	56%	84%		50%	67%	67%	65%	60%	53%	78%	61%
	Full package tour	22%	24%	14%		13%	29%	22%	24%	18%	13%	22%	17%
	Individually arranged travel (FIT)	7%	16%	2%		25%	5%	3%	4%	13%	28%		11%
	Group tour	5%	2%		100%	13%		4%	5%	2%	3%		5%
	Company paid travel	3%	2%					3%	1%	5%	3%		5%
	Other	1%						1%		2%			1%
	Total Count	349	105	43	16	8	21	140	248	84	32	9	148

# Travel Motivation Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	33%	34%	33%	38%	25%	14%	31%	28%	46%	50%	11%	79%	
	Price	25%	26%	26%	6%	13%	5%	32%	24%	25%	28%	11%	23%	
	Visit friends/ Relatives	2%	3%		6%			1%	2%	5%	3%	11%	3%	
	Recomm- friend/family/trvl agnt	21%	14%	26%	13%	25%	10%	21%	24%	14%	6%	22%	16%	
	Scuba	7%	7%	2%			5%	13%	6%	8%	6%		7%	
	Water sports	19%	13%	26%		13%		32%	20%	14%	16%	11%	15%	
	Short travel time	49%	55%	56%	13%	50%	19%	51%	47%	54%	59%	56%	51%	
	Golf	2%	4%			13%		5%	1%	2%	3%		4%	
	Relax	35%	35%	49%		38%	5%	37%	35%	35%	28%	11%	38%	
	Company/ Business Trip	11%	5%	2%	81%	13%	5%	9%	10%	12%	9%		16%	
	Company Sponsored	0%			6%			1%	0%				1%	
	Safe	19%	19%	19%	6%	25%	10%	19%	18%	19%	25%	11%	19%	
	Natural beauty	57%	53%	70%	13%	38%	14%	59%	59%	55%	50%	56%	52%	
	Shopping	32%	25%	56%	19%	13%	5%	33%	37%	24%	25%	33%	30%	
	Married/ Attn wedding	6%	14%	2%		13%	100%	3%	6%	6%	9%	44%	5%	
	Honeymoon	3%	9%				19%	3%	3%	2%		100%	1%	
	Pleasure	45%	41%	58%		25%	5%	51%	48%	39%	50%	44%	42%	
	Organized sports	1%				13%		2%	1%	1%			3%	
	Other	4%	6%	2%				4%	4%	4%	6%		2%	
	Total	Count	350	105	43	16	8	21	140	249	84	32	9	149

# Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	82%	83%	81%	94%	75%	90%	81%	83%	80%	84%	89%	74%	
	Travel Guidebook- Bookstore	49%	56%	56%	25%	25%	43%	57%	51%	46%	53%	100%	38%	
	Travel Agent Brochure	40%	38%	47%	31%	38%	43%	48%	41%	37%	28%	67%	38%	
	Magazine (Consumer)	36%	33%	44%	25%	38%	38%	40%	39%	26%	28%	44%	36%	
	Friend/ Relative	34%	25%	44%	31%	13%	29%	38%	38%	23%	9%	33%	26%	
	Prior Trip	31%	34%	35%	19%	50%	24%	28%	27%	39%	44%	11%	73%	
	Co-Worker/ Company Trvl Dept	6%	4%	7%	19%	13%		6%	5%	10%		11%	9%	
	TV	6%	5%	5%	6%			6%	7%	5%	6%	11%	9%	
	Consumer Trvl Show	1%			6%			1%	1%				1%	
	GVB Office	1%	1%					1%	1%	1%	3%		1%	
	GVB Promo	1%	2%						0%	1%	6%		2%	
	Other	1%	1%	2%				1%		2%			1%	
	Newspaper	1%	1%			13%		1%	0%					
	Radio	0%	1%					1%	0%					
	Total	Count	348	104	43	16	8	21	139	247	84	32	9	149

# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures Tracking

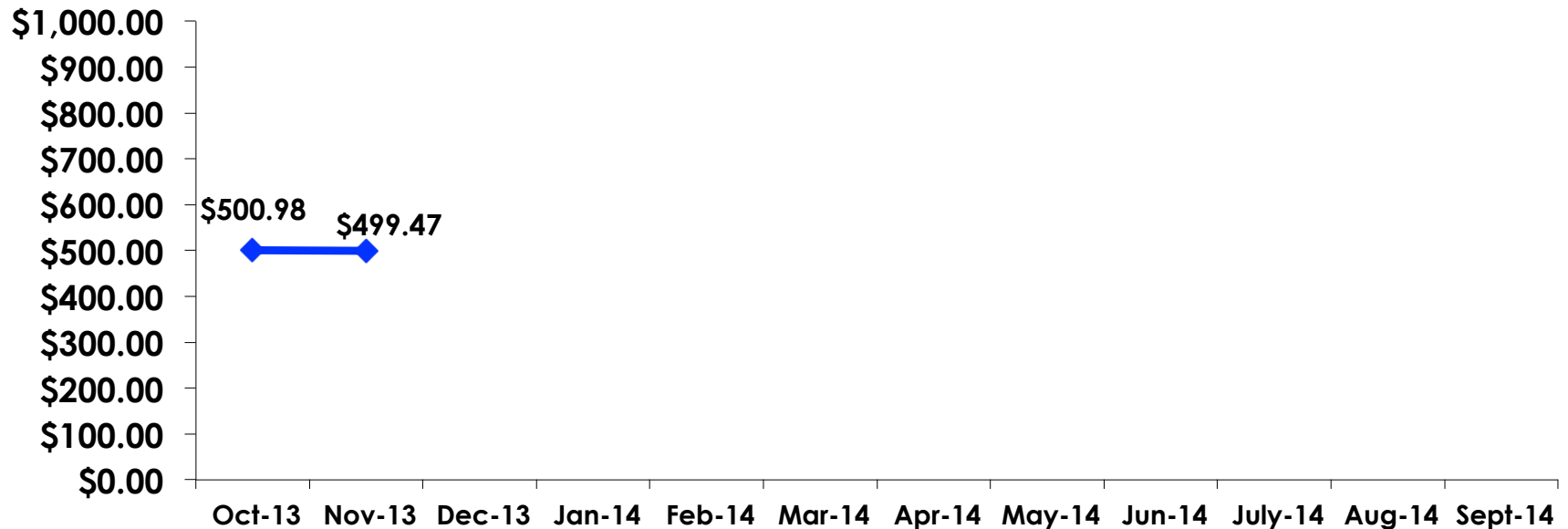


YTD=\$683.21

# Prepaid Expenditures Per Person Per Trip Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$686.70	\$887.40	\$657.79	\$480.06	\$615.04	\$898.37	\$741.21	\$645.63	\$808.03	\$619.23	\$1,474.32	\$667.07
	Median	\$622	\$747	\$598	\$447	\$550	\$857	\$679	\$598	\$697	\$614	\$1,295	\$598
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$747	\$0
	Maximum	\$5,480	\$5,480	\$1,196	\$1,196	\$1,061	\$3,288	\$4,982	\$4,982	\$5,480	\$1,246	\$3,288	\$5,480

# On-Island Expenditures Per Trip Tracking



YTD = \$500.23

# On-Island Expenditures Per Person Per Trip Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$499.47	\$390.62	\$737.59	\$526.15	\$553.50	\$364.25	\$556.59	\$516.24	\$449.70	\$282.76	\$501.11	\$540.22
	Median	\$380	\$300	\$500	\$400	\$556	\$200	\$435	\$400	\$350	\$217	\$300	\$400
	Minimum	\$0	\$0	\$0	\$0	\$125	\$0	\$0	\$0	\$0	\$70	\$0	\$0
	Maximum	\$4,000	\$2,500	\$3,000	\$1,640	\$1,000	\$1,667	\$4,000	\$4,000	\$3,000	\$1,667	\$2,500	\$4,000



# 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	\$25.55	\$54.01	\$15.70	\$8.75	\$43.75	\$57.33	\$22.94	\$16.20	\$44.14	\$51.84	\$33.67	\$35.11
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$15	\$8	\$0
F&B FF/STORE	Mean	\$28.43	\$35.12	\$9.95	\$23.25	\$38.75	\$29.19	\$25.67	\$27.46	\$30.40	\$47.25	\$12.78	\$26.09
	Median	\$10	\$15	\$0	\$0	\$11	\$10	\$7	\$10	\$10	\$25	\$10	\$8
F&B RESTRNT	Mean	\$67.88	\$93.08	\$80.12	\$46.56	\$87.50	\$96.05	\$59.38	\$58.08	\$91.73	\$103.28	\$60.00	\$72.23
	Median	\$20	\$60	\$0	\$35	\$60	\$100	\$13	\$0	\$50	\$98	\$50	\$20
OPT TOUR	Mean	\$73.48	\$110.06	\$33.98	\$56.56	\$131.75	\$49.52	\$108.64	\$62.74	\$98.86	\$63.44	\$142.22	\$78.31
	Median	\$0	\$0	\$0	\$45	\$74	\$0	\$50	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$189.49	\$197.36	\$354.70	\$118.94	\$75.00	\$73.81	\$199.29	\$179.10	\$227.06	\$161.66	\$409.44	\$204.42
	Median	\$32	\$50	\$100	\$35	\$25	\$0	\$50	\$30	\$45	\$25	\$100	\$30
GIFT- OTHER	Mean	\$103.08	\$132.62	\$86.72	\$125.63	\$169.38	\$93.71	\$120.95	\$88.55	\$137.70	\$130.28	\$262.22	\$112.04
	Median	\$50	\$100	\$80	\$75	\$110	\$75	\$70	\$50	\$100	\$95	\$100	\$50
TRANS	Mean	\$13.15	\$11.96	\$5.42	\$7.06	\$8.38	\$26.10	\$12.39	\$13.06	\$12.71	\$11.56	\$0.00	\$14.76
	Median	\$0	\$0	\$0	\$0	\$2	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$175.34	\$228.31	\$187.60	\$183.88	\$201.00	\$409.14	\$186.49	\$191.52	\$135.25	\$320.69	\$81.89	\$226.54
	Median	\$0	\$0	\$0	\$43	\$18	\$0	\$0	\$0	\$0	\$0	\$2	\$0
TOTAL	Mean	\$674.47	\$862.52	\$758.91	\$570.63	\$755.50	\$834.86	\$735.78	\$636.66	\$770.04	\$890.00	\$1,002.22	\$767.21
	Median	\$500	\$600	\$600	\$470	\$601	\$480	\$500	\$500	\$505	\$675	\$600	\$500

# Total Expenditures Tracking



YTD=\$1,183.44

# 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	\$1,186.18	\$1,278.02	\$1,395.38	\$1,006.21	\$1,168.54	\$1,262.62	\$1,297.80	\$1,161.87	\$1,257.73	\$901.99	\$1,975.43	\$1,207.29
	Median	\$1,078	\$1,097	\$1,297	\$848	\$1,014	\$1,252	\$1,152	\$1,087	\$1,047	\$871	\$1,586	\$1,033
	Minimum	\$0	\$0	\$200	\$0	\$699	\$200	\$200	\$0	\$0	\$270	\$1,097	\$0
	Maximum	\$5,980	\$5,980	\$4,196	\$2,636	\$1,996	\$3,288	\$5,482	\$5,482	\$5,980	\$2,165	\$3,795	\$5,980

# 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 ( $p \leq .05$ ) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

<b>Comparison of Drivers of Overall Satisfaction, Oct, Nov 2013, and Overall Oct-Nov 2013</b>			
	Oct-13	Nov-13	Combined Oct-Nov 2013
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks			
Ease of getting around			
Safety walking around at night			
Quality of daytime tours	2		
Variety of daytime tours			3
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping	4		5
Variety of shopping			
Price of things on Guam			
Quality of hotel accommodations			
Quality/cleanliness of air, sky	3	<b>4</b>	4
Quality/cleanliness of parks			
Quality of landscape in Tumon	1	<b>2</b>	1
Quality of landscape in Guam			
Quality of ground handler		<b>1</b>	2
Quality/cleanliness of transportation vehicles		<b>3</b>	6
% of Per Person On Island Expenditures Accounted For	45.2%	<b>41.7%</b>	43.4%
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 November 2014 Period. By rank order they are:
  - **Quality of ground handler,**
  - **Quality of landscape in Tumon,**
  - **Quality/cleanliness of transportation vehicles, and**
  - **Quality/cleanliness of air, sky.**
- With all four factors the overall  $r^2$  is .417 meaning that **41.7% of overall satisfaction is accounted for by these factors.**

<b>Drivers of Per Person On Island Expenditures, Oct, Nov 2013 and Overall Oct-Nov 2013</b>			
Drivers:	Oct-13	<b>Nov-13</b>	Combined Oct-Nov 2013
	rank	<b>rank</b>	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%	<b>0.0%</b>	0.0%
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 November 2013 Period.