



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015 Market Segmentation

NOVEMBER 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 **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

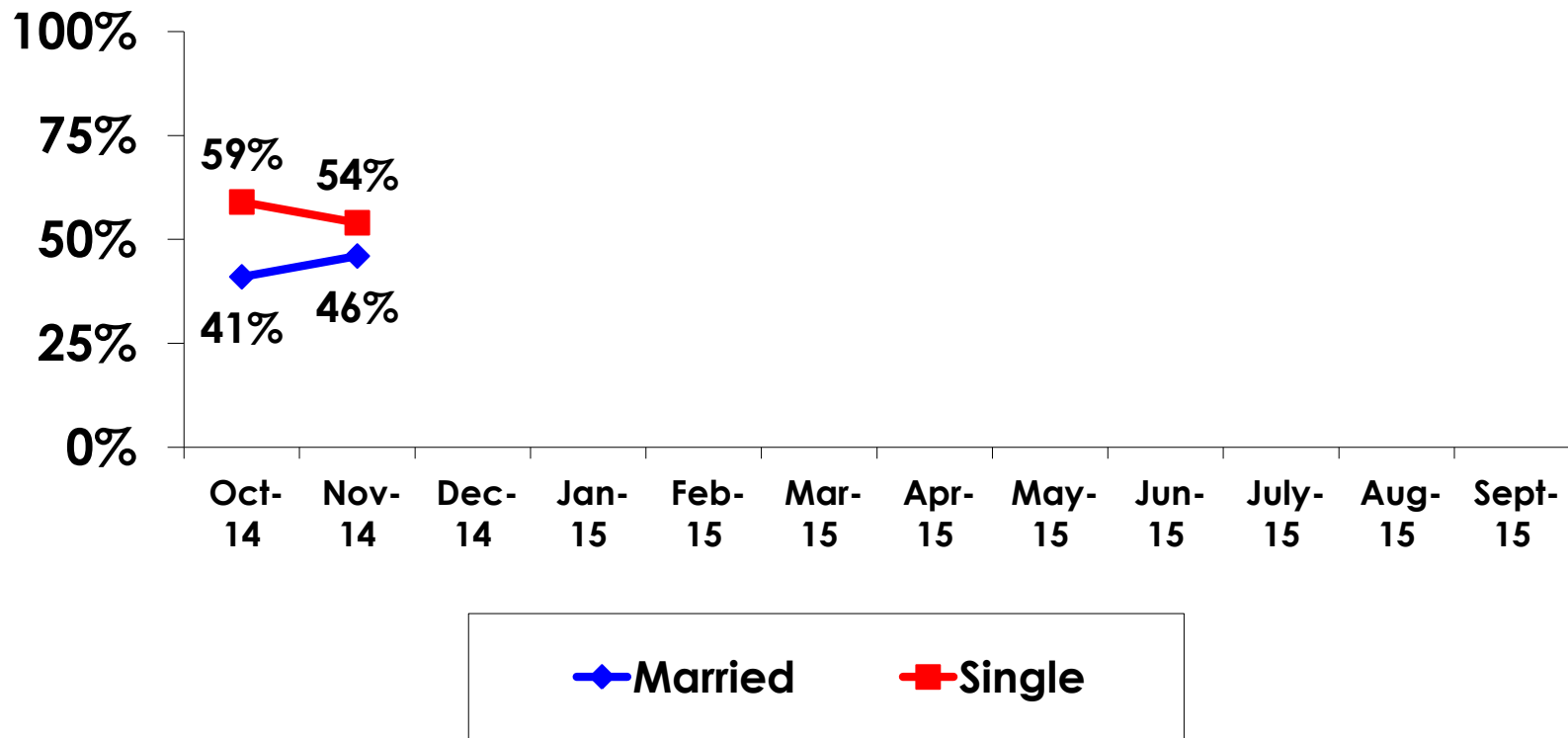
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%										
Office Lady	13%	11%										
Group	5%	3%										
Silver	2%	5%										
Wedding	9%	6%										
Sport	32%	29%										
18-35	71%	63%										
36-55	25%	29%										
Child	11%	12%										
Honey-moon	4%	5%										
Repeat	43%	43%										
TOTAL	351	350										

SECTION 1 **PROFILE OF RESPONDENTS**

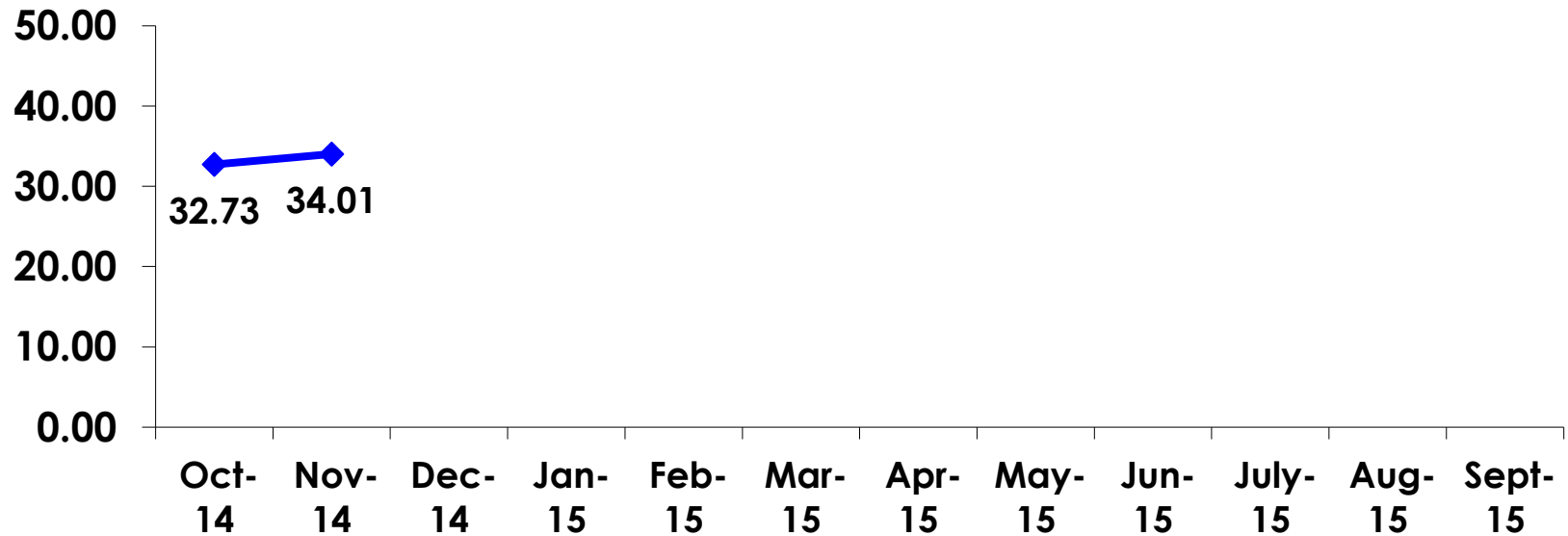
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	46%	86%	34%	55%	89%	70%	31%	26%	79%	100%	100%	58%
	Single	54%	14%	66%	45%	11%	30%	69%	74%	21%			42%
	Total Count	350	138	38	11	19	20	100	219	103	41	17	151

AVERAGE AGE - TRACKING



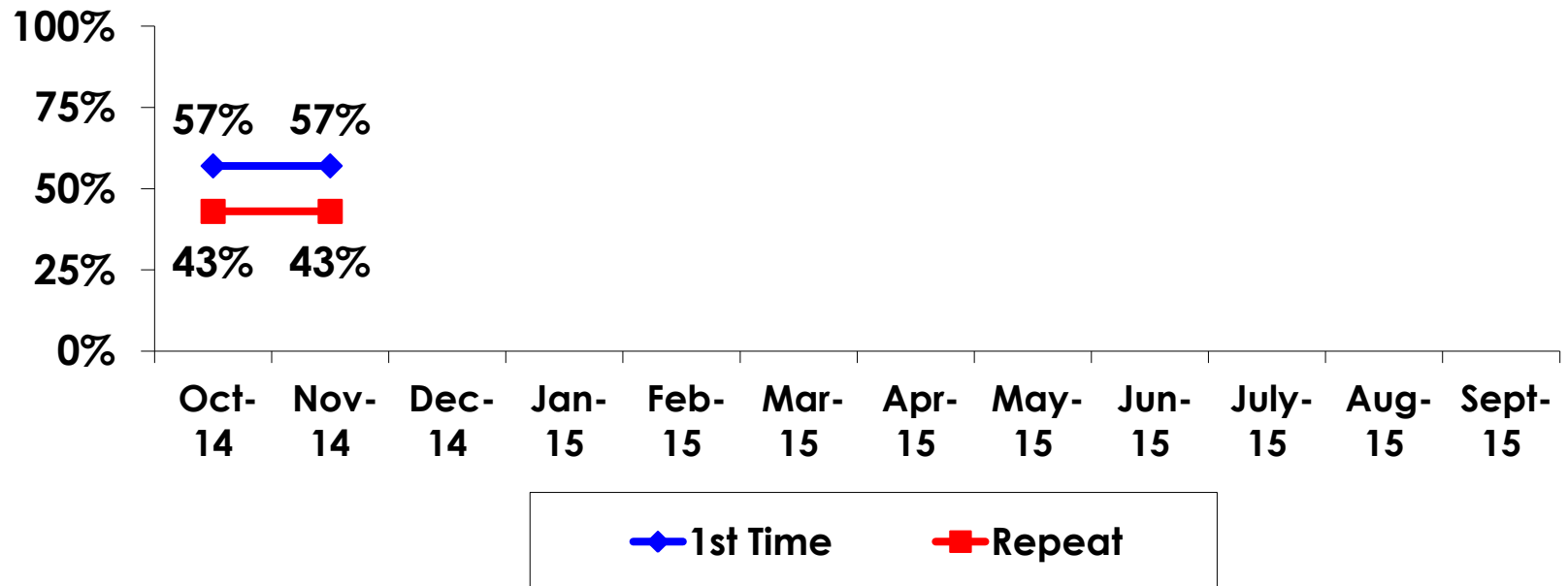
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	27%	4%	16%	45%		11%	43%	42%			12%	14%
	25-34	36%	34%	53%	18%		32%	34%	57%		20%	47%	30%
	35-49	25%	40%	24%	27%		16%	15%	1%	83%	65%	41%	39%
	50+	13%	22%	8%	9%	100%	42%	8%		17%	15%		17%
	Total Count	348	137	38	11	19	19	100	219	103	40	17	150
QF	Mean	34.01	40.64	32.55	33.27	64.68	42.95	30.11	26.09	43.66	41.73	32.82	38.10
	Median	30	39	30	25	65	39	26	26	42	40	30	38

INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	4%	1%	6%	25%			5%	6%	2%			6%
	Y2.0M-Y3.0M	12%	9%	13%	25%	6%	11%	13%	15%	9%	3%	7%	9%
	Y3.0M-Y4.0M	18%	13%	38%	25%	28%	11%	19%	24%	8%	3%	20%	15%
	Y4.0M-Y5.0M	16%	22%	19%		28%	11%	18%	16%	14%	21%	40%	15%
	Y5.0M-Y7.0M	19%	22%			22%	28%	14%	11%	32%	21%	20%	21%
	Y7.0M-Y10.0M	12%	14%	13%		6%	17%	10%	11%	13%	18%		12%
	Y10.0M+	18%	19%	13%	25%	11%	22%	19%	15%	21%	34%	13%	21%
	No Income	1%						2%	1%				
	Total Count	295	127	32	8	18	18	84	170	98	38	15	137

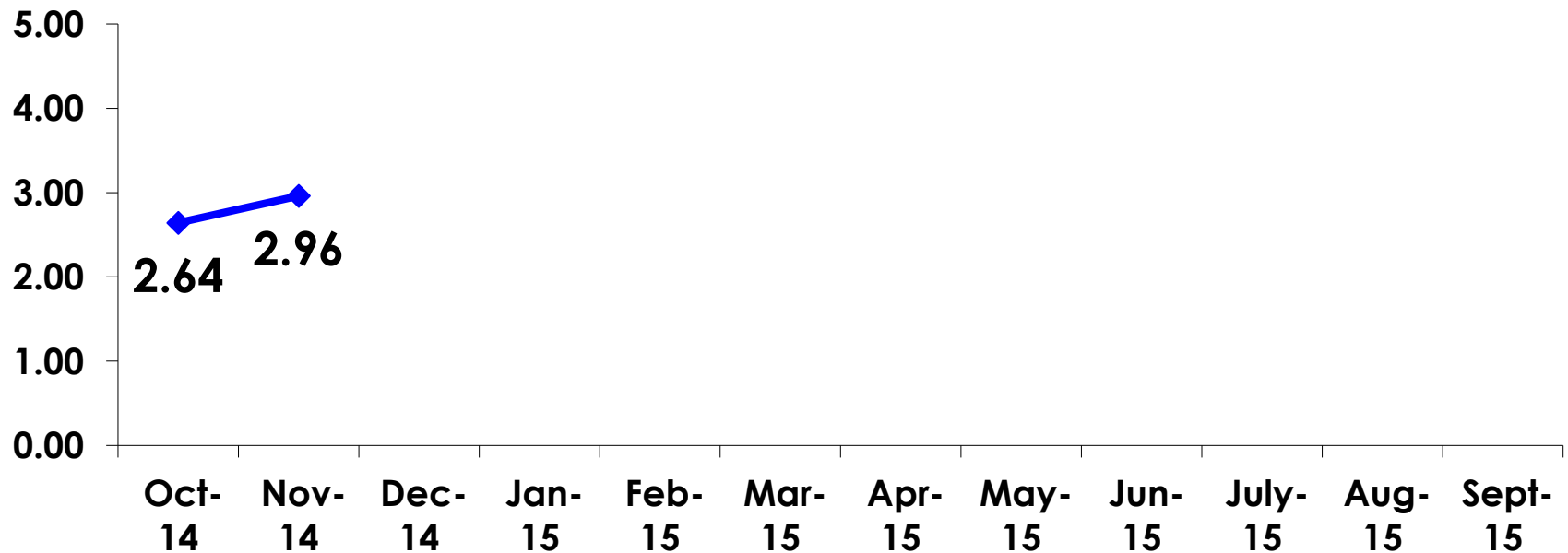
PRIOR TRIPS TO GUAM - TRACKING



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%	45%	55%	82%	47%	70%	69%	69%	34%	29%	75%		
	No	43%	55%	45%	18%	53%	30%	31%	31%	66%	71%	25%	100%	
	Total	Count	349	137	38	11	19	20	99	218	103	41	16	151

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	2.96	3.07	2.74	2.36	3.05	3.10	2.82	2.71	3.45	3.27	3.41	3.32
	Median	3	3	3	2	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	61%	57%	68%		44%	60%	67%	68%	50%	46%	65%	58%	
	Full package tour	21%	25%	22%		28%	30%	21%	18%	26%	29%	29%	20%	
	Individually arranged travel (FIT)	10%	18%	5%		22%	10%	6%	5%	18%	24%	6%	18%	
	Company paid travel	4%		5%				4%	6%	2%			2%	
	Group tour	3%			100%	6%		1%	3%	3%			1%	
	Other	0%								1%			1%	
	Total	Count	343	136	37	11	18	20	98	213	103	41	17	151

TRAVEL MOTIVATION - SEGMENTATION

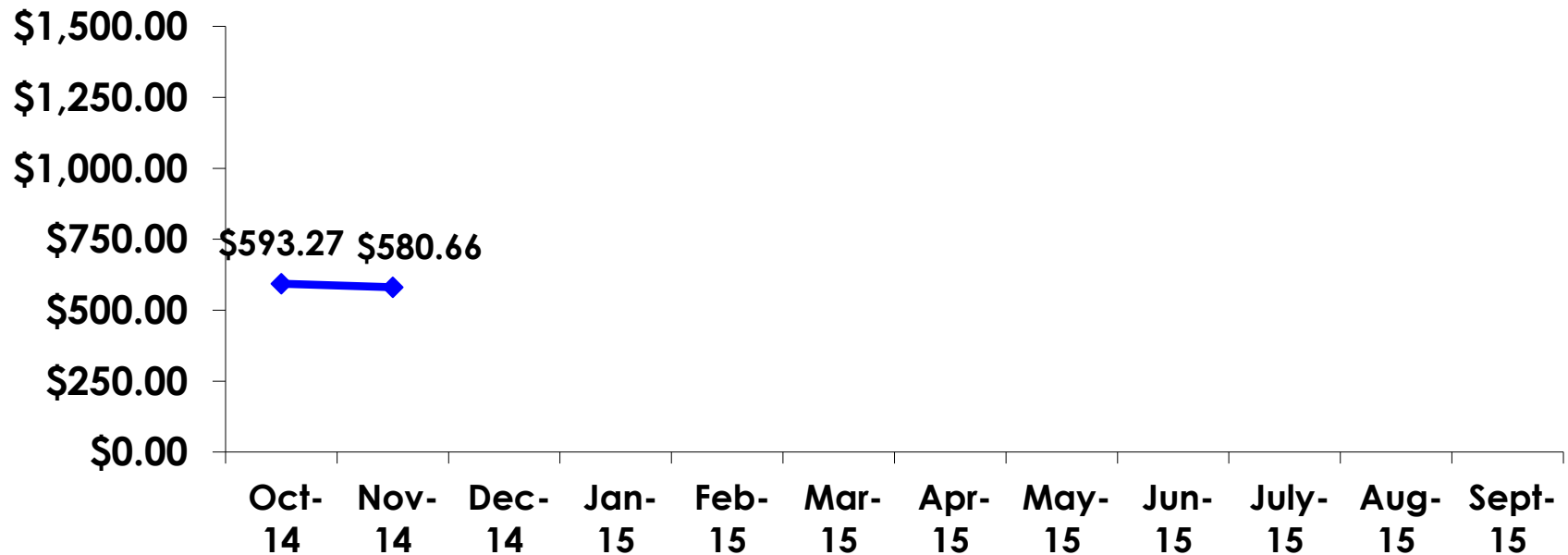
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	37%	52%	39%	9%	53%	30%	26%	26%	56%	68%	18%	87%	
	Price	22%	16%	18%	9%	16%		29%	27%	14%	15%	24%	19%	
	Visit friends/ Relatives	2%		3%		5%		3%	2%				1%	
	Recomm- friend/family/trvl agnt	24%	9%	34%	18%	11%		27%	30%	13%	10%	18%	13%	
	Scuba	4%	2%					8%	4%	4%	2%		3%	
	Water sports	17%	13%	24%				36%	21%	11%	15%	12%	11%	
	Short travel time	48%	59%	55%		53%	10%	47%	44%	51%	73%	59%	56%	
	Golf	5%	4%	5%		21%		9%	2%	8%	2%		8%	
	Relax	39%	42%	34%	9%	37%	5%	35%	37%	43%	51%	41%	47%	
	Company/ Business Trip	8%	1%	3%	64%	5%		9%	9%	7%	2%		6%	
	Company Sponsored	1%	1%	3%		5%		2%		3%	2%		2%	
	Safe	25%	31%	24%	9%	37%	15%	24%	21%	30%	39%	18%	32%	
	Natural beauty	57%	57%	58%	27%	37%	10%	63%	60%	51%	63%	41%	60%	
	Shopping	33%	33%	37%	9%	26%	10%	34%	34%	30%	32%	24%	36%	
	Career Cert/ Testing	1%							0%					
	Married/ Attn wedding	6%	12%	3%		21%	100%	2%	4%	7%	7%	12%	4%	
	Honeymoon	5%	12%	3%			10%	5%	5%	7%	2%	100%	3%	
	Pleasure	53%	44%	55%	27%	37%	10%	65%	56%	48%	59%	53%	56%	
	Organized sports	2%	2%	3%		5%		1%	1%	1%	2%		1%	
	Other	4%	2%	3%			5%	6%	2%	8%	5%		3%	
	Total	Count	350	138	38	11	19	20	100	219	103	41	17	151

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	77%	77%	76%	60%	67%	55%	80%	78%	75%	75%	82%	76%	
	Travel Guidebook- Bookstore	53%	49%	61%	70%	44%	55%	55%	55%	50%	45%	59%	51%	
	Travel Agent Brochure	39%	40%	32%	50%	22%	60%	41%	39%	45%	23%	76%	36%	
	Prior Trip	38%	51%	34%	20%	50%	30%	26%	26%	60%	68%	24%	88%	
	Friend/ Relative	33%	24%	37%	40%	39%	30%	38%	36%	25%	33%	53%	23%	
	Magazine (Consumer)	29%	26%	26%	10%	11%	15%	42%	33%	25%	33%	41%	26%	
	TV	9%	7%	11%		6%	5%	11%	10%	5%	5%		6%	
	Co-Worker/ Company Trvl Dept	4%	1%	8%	20%			4%	3%	6%		12%	3%	
	Consumer Trvl Show	2%	2%	3%		6%	10%	2%	2%	2%			1%	
	GVB Promo	2%	2%			11%	10%	2%	2%				2%	
	Other	1%	2%							3%	3%		1%	
	GVB Office	1%	1%	3%				1%	1%	1%			1%	
	Travel Trade Show	0%								1%			1%	
	Newspaper	0%								1%			1%	
	Total	Count	347	136	38	10	18	20	100	218	102	40	17	151

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING

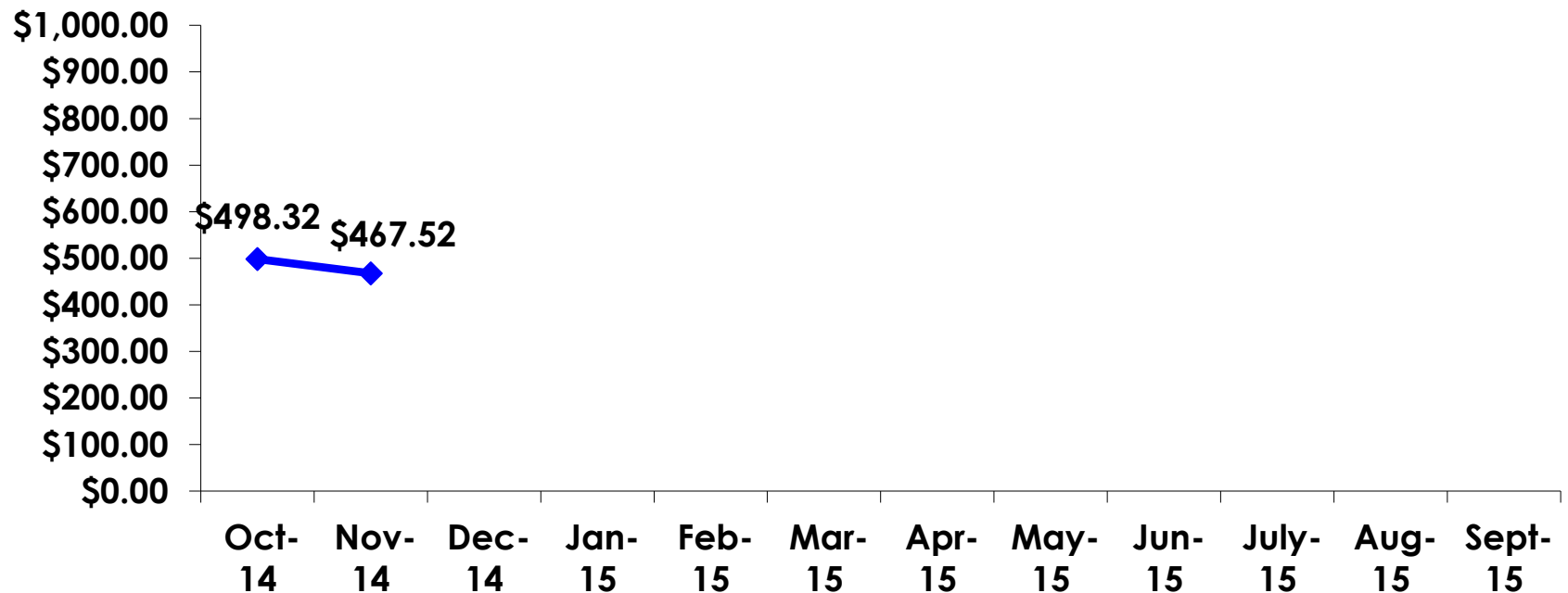


YTD=\$586.96

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	\$580.66	\$658.65	\$540.04	\$157.49	\$719.08	\$827.66	\$624.45	\$548.39	\$618.97	\$571.55	\$823.49	\$576.73
	Median	\$547	\$631	\$526	\$0	\$757	\$841	\$576	\$505	\$631	\$631	\$841	\$572
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$420	\$0
	Maximum	\$7,232	\$5,256	\$1,261	\$841	\$2,439	\$5,256	\$5,256	\$7,232	\$1,682	\$1,261	\$1,194	\$1,682

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$482.92

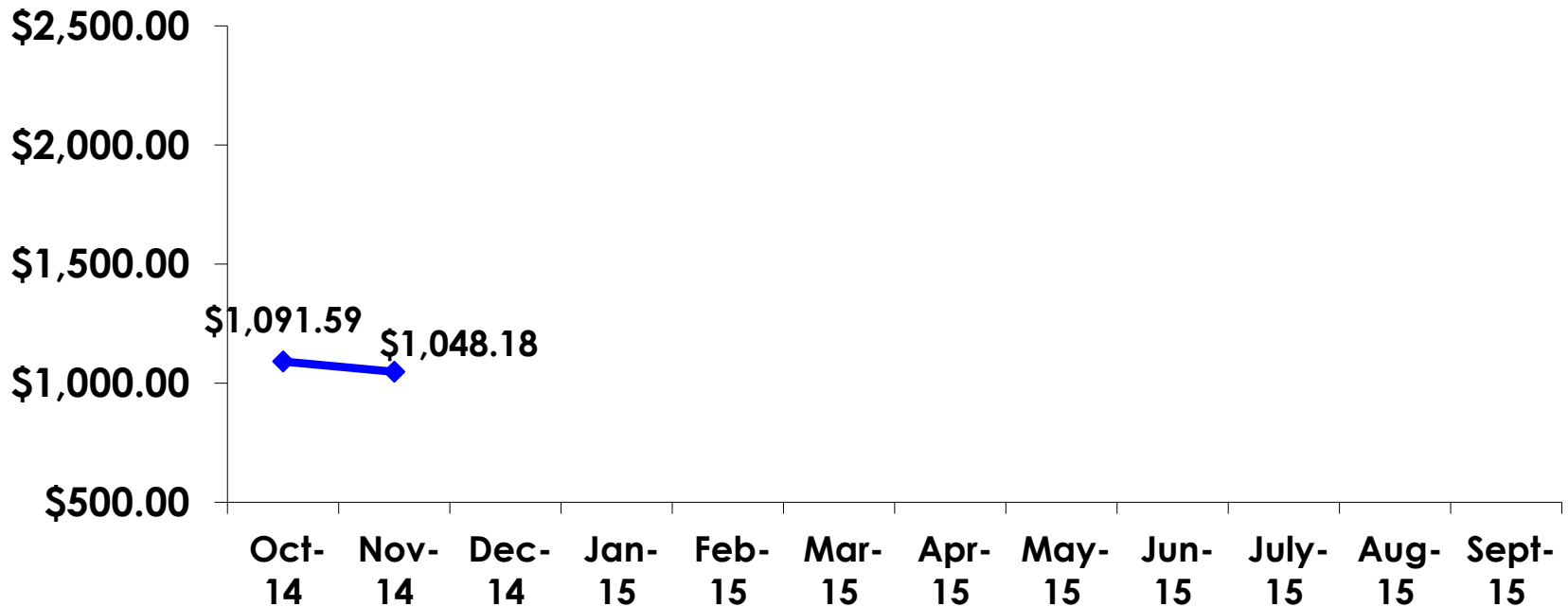
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$467.52	\$414.03	\$393.51	\$650.00	\$630.77	\$363.30	\$489.71	\$432.28	\$515.57	\$321.97	\$491.67	\$526.10
	Median	\$333	\$300	\$342	\$400	\$500	\$225	\$300	\$350	\$324	\$250	\$300	\$333
	Minimum	\$0	\$0	\$0	\$0	\$60	\$0	\$0	\$0	\$0	\$0	\$75	\$0
	Maximum	\$5,000	\$2,850	\$1,010	\$1,300	\$2,850	\$2,000	\$2,850	\$4,000	\$5,000	\$2,850	\$2,000	\$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	\$30.70	\$46.35	\$23.45	\$23.18	\$57.11	\$94.85	\$36.60	\$20.91	\$47.87	\$74.39	\$47.94	\$34.15
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$29.26	\$34.12	\$18.89	\$49.09	\$17.63	\$37.75	\$28.75	\$30.45	\$30.08	\$51.29	\$19.71	\$27.34
	Median	\$0	\$0	\$0	\$20	\$0	\$0	\$5	\$3	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$79.82	\$108.41	\$44.39	\$39.91	\$148.84	\$82.25	\$77.01	\$58.11	\$111.07	\$141.22	\$158.53	\$99.25
	Median	\$20	\$0	\$0	\$33	\$0	\$0	\$10	\$0	\$53	\$30	\$100	\$27
OPT TOUR	Mean	\$72.75	\$76.31	\$30.89	\$114.55	\$56.84	\$88.75	\$88.87	\$57.02	\$114.79	\$56.95	\$85.88	\$75.65
	Median	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$150.75	\$167.28	\$82.89	\$42.73	\$92.11	\$250.50	\$130.64	\$110.10	\$249.53	\$122.80	\$298.82	\$180.73
	Median	\$19	\$0	\$10	\$50	\$0	\$0	\$8	\$20	\$0	\$0	\$150	\$3
GIFT- OTHER	Mean	\$114.64	\$118.08	\$76.84	\$277.27	\$226.84	\$109.35	\$114.27	\$87.49	\$151.09	\$125.10	\$174.12	\$128.74
	Median	\$30	\$0	\$0	\$100	\$20	\$0	\$30	\$30	\$50	\$0	\$200	\$7
TRANS	Mean	\$16.21	\$24.64	\$2.21	\$1.64	\$25.79	\$31.50	\$23.98	\$12.59	\$18.50	\$20.34	\$41.18	\$20.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$217.95	\$346.62	\$170.05	\$97.09	\$531.05	\$130.65	\$217.66	\$212.97	\$175.45	\$348.41	\$189.12	\$233.82
	Median	\$0	\$0	\$0	\$67	\$142	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$712.70	\$927.16	\$452.26	\$650.00	\$1,156.21	\$810.60	\$724.61	\$587.83	\$906.91	\$968.07	\$1,002.94	\$798.58
	Median	\$500	\$800	\$425	\$400	\$600	\$500	\$500	\$408	\$700	\$912	\$600	\$600

TOTAL EXPENDITURES – TRACKING



YTD=\$1,069.88

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	\$1,048.18	\$1,072.67	\$933.56	\$807.49	\$1,349.84	\$1,190.95	\$1,114.16	\$980.67	\$1,134.54	\$893.53	\$1,315.16	\$1,102.84
	Median	\$960	\$995	\$921	\$771	\$1,091	\$1,048	\$973	\$889	\$1,041	\$856	\$1,141	\$1,000
	Minimum	\$0	\$0	\$0	\$0	\$154	\$0	\$0	\$0	\$0	\$0	\$570	\$0
	Maximum	\$8,332	\$5,456	\$2,271	\$1,341	\$3,682	\$5,456	\$5,456	\$8,332	\$5,925	\$2,850	\$2,925	\$5,925

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 2014, and Overall Oct-Nov 2014			
	Oct-14	Nov-14	Combined Oct-Nov 2014
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks		3	4
Ease of getting around			
Safety walking around at night			
Quality of daytime tours		5	5
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping	3		2
Variety of shopping		4	
Price of things on Guam			
Quality of hotel accommodations			
Quality/cleanliness of air, sky			
Quality/cleanliness of parks		1	
Quality of landscape in Tumon	2		1
Quality of landscape in Guam		2	
Quality of ground handler	1		3
Quality/cleanliness of transportation vehicles			
% of Overall Satisfaction Accounted For	47.0%	52.7%	47.0%
NOTE: Only significant drivers are included.			

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by five significant factors in the November 2014 Period. By rank order they are:
 - **Quality/cleanliness of parks,**
 - **Quality of landscape in Guam,**
 - **Quality & cleanliness of beaches & parks,**
 - **Variety of shopping, and**
 - **Quality of daytime tours.**
- With all five factors the overall r^2 is .527 meaning that **52.7% of overall satisfaction is accounted for by these factors.**

Drivers of Per Person On Island Expenditures, Oct, Nov 2014 and Overall Oct-Nov 2014			
	Oct-14	Nov-14	Combined Oct-Nov 2014
Drivers:	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%
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 factor in the November 2014 Period.