

GUAM VISITORS BUREAU Japan Visitor Tracker Exit Profile FY2015 Market Segmentation SEPTEMBER 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 **352** 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 **352** 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

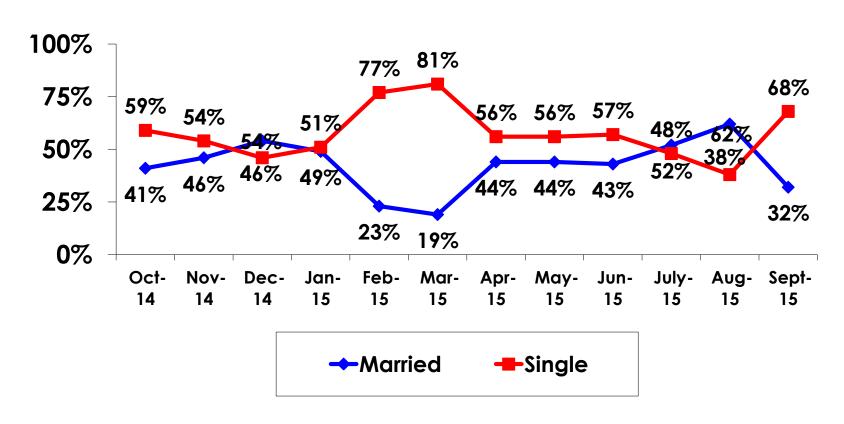
	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	July 15	Aug 15	Sept 15
Families	36%	39%	59%	46%	23%	21%	37%	45%	42%	52%	67%	34%
Office Lady	13%	11%	10%	12%	8%	2%	9%	16%	19%	12%	7%	8%
Group	5%	3%	1%	4%	5%	4%	5%	3%	4%	2%	1%	3%
Silver	2%	5%	3%	5%	3%	0%	4%	4%	5%	3%	1%	1%
Wedding	9%	6%	0%	3%	2%	1%	6%	6%	10%	5%	2%	1%
Sport	32%	29%	35%	27%	33%	41%	32%	29%	29%	28%	36%	33%
18-35	71%	63%	48%	56%	83%	84%	60%	62%	66%	60%	41%	73%
36-55	25%	29%	46%	36%	13%	13%	34%	30%	25%	34%	56%	24%
Child	11%	12%	35%	19%	7%	10%	13%	13%	9%	25%	51%	10%
Honey- moon	4%	5%	3%	4%	4%	2%	5%	4%	5%	4%	1%	4%
Repeat	43%	43%	51%	50%	34%	25%	45%	43%	47%	46%	51%	36%
TOTAL	351	350	351	350	350	352	352	352	352	352	352	₅ 352



SECTION 1 PROFILE OF RESPONDENTS



MARITAL STATUS -TRACKING



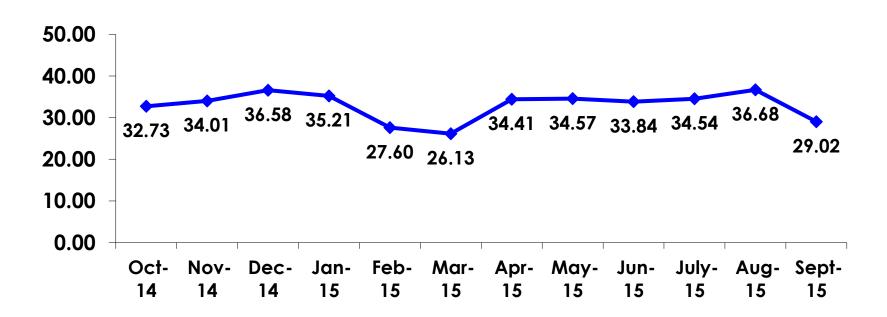


MARITAL STATUS-SEGMENTATION

			TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
			-	-	-	-	-	-	-	-	-	-	-	-
QE	Married		32%	86%	22%	11%	100%	75%	30%	16%	77%	94%	83%	47%
	Single		68%	14%	78%	89%		25%	70%	84%	23%	6%	17%	53%
	Total	Count	348	117	27	9	3	4	115	256	83	34	12	127



AVERAGE AGE - TRACKING





AGE-SEGMENTATION

			TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
			-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24		50%	10%	32%	89%			51%	68%		3%	25%	29%
	25-34		23%	30%	43%				22%	31%		15%	58%	28%
	35-49		21%	44%	21%	11%		75%	22%	2%	82%	79%	8%	31%
	50+		6%	15%	4%		100%	25%	5%		18%	3%	8%	12%
	Total	Count	348	117	28	9	3	4	116	258	83	34	12	127
QF	Mean		29.02	38.03	29.68	21.89	63.33	42.75	28.86	23.49	43.57	39.53	29.50	33.52
	Median		24	38	27	20	62	41	24	22	42	40	28	30

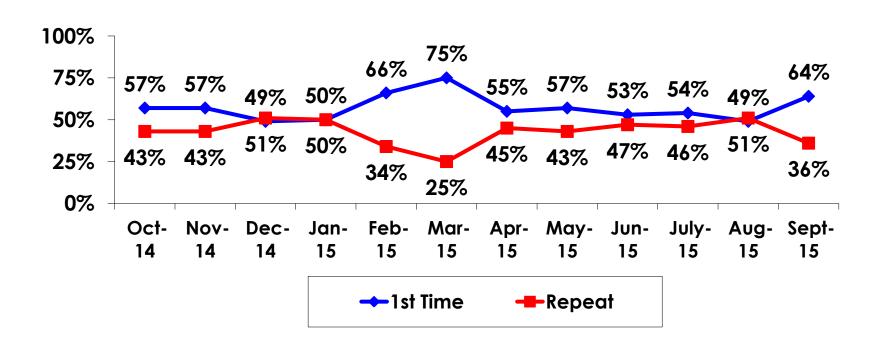


INCOME - SEGMENTATION

													HONEYMOO	
			TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	Ν	REPEAT
			•	-	-	-	-	-	-	-	-	-	-	-
Q26	<y2.0 million<="" td=""><td></td><td>9%</td><td>1%</td><td>4%</td><td>25%</td><td></td><td></td><td>10%</td><td>12%</td><td>1%</td><td></td><td></td><td>4%</td></y2.0>		9%	1%	4%	25%			10%	12%	1%			4%
	Y2.0M-Y3.0M		8%	2%	27%				7%	10%	1%		17%	9%
	Y3.0M-Y4.0M		13%	11%	12%	13%		25%	12%	16%	8%	10%	25%	10%
	Y4.0M-Y5.0M		12%	14%	19%	13%		25%	14%	10%	17%	6%		13%
	Y5.0M-Y7.0M		20%	24%	15%	25%	67%		14%	16%	27%	23%	42%	24%
	Y7.0M-Y10.0M		17%	27%	8%	13%	33%	50%	21%	16%	21%	26%	8%	16%
	Y10.0M+		19%	21%	15%				18%	17%	26%	35%	8%	24%
	No Income		3%	1%		13%			3%	4%				1%
	Total	Count	292	109	26	8	3	4	99	205	78	31	12	105



PRIOR TRIPS TO GUAM - TRACKING



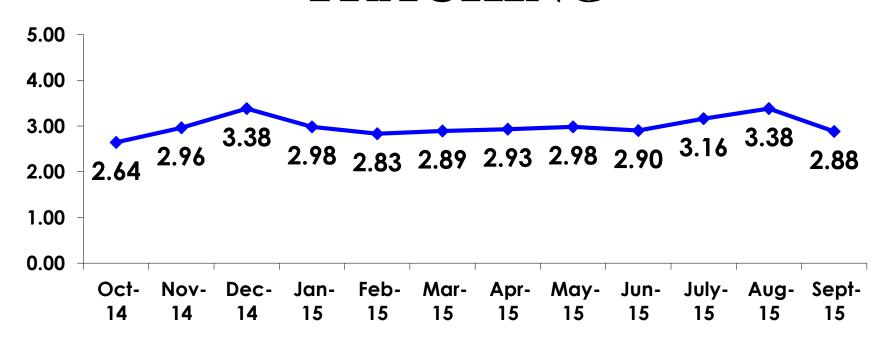


PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
			-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes		64%	49%	50%	100%	33%	75%	70%	71%	46%	29%	69%	
	No		36%	51%	50%		67%	25%	30%	29%	54%	71%	31%	100%
	Total	Count	352	119	28	9	3	4	116	258	83	34	13	128



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	HONEYMOO N	REPEAT
		,	-	-	-	-	-	-	-	-	-	-	-
Q8	Mean	2.88	3.21	2.61	2.22	2.67	2.50	3.03	2.79	3.16	3.53	2.85	2.99
	Median	3	3	2	2	3	3	3	3	3	3	3	3



SECTION 2 TRAVEL PLANNING



TRAVEL PLANNING - SEGMENTATION

		тот	'AL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-		-	-	-	-	-	-	-	-	-	-	-
Q7	Free-time package tour	6	9%	66%	78%		100%	67%	77%	67%	68%	50%	77%	68%
	Full package tour	2	23%	24%	11%			33%	16%	25%	20%	32%	15%	23%
	Individually arranged travel (FIT)		5%	8%	4%				4%	3%	11%	12%	8%	8%
	Group tour		3%	3%		100%			3%	3%	1%	6%		
	Other		1%		4%					1%				1%
	Company paid travel		1%		4%					1%				
	Total Cou	nt	347	119	27	9	3	3	115	255	81	34	13	126



TRAVEL MOTIVATION - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	30%	47%	50%		67%	25%	23%	22%	52%	68%	31%	84%
	Price	27%	28%	14%	22%	67%		29%	26%	30%	21%		23%
	Visit friends/ Relatives	3%	3%					5%	3%	2%	3%		2%
	Recomm- friend/family/trvl agnt	28%	15%	18%	44%			36%	32%	22%	18%	8%	13%
	Scuba	7%	7%	4%				16%	7%	6%	3%	8%	6%
	Water sports	23%	20%	21%				44%	24%	18%	9%	38%	18%
	Short travel time	57%	63%	79%	22%	33%		63%	55%	61%	65%	69%	63%
	Golf	1%	3%			33%		3%	1%	2%	3%		2%
	Relax	43%	45%	46%	22%			46%	44%	40%	32%	38%	49%
	Company/ Business Trip	2%	2%		44%			3%	2%	2%	3%		1%
	Safe	28%	34%	25%	22%			31%	25%	37%	38%	23%	33%
	Natural beauty	68%	60%	71%	44%	33%		69%	72%	58%	53%	54%	67%
	Shopping	36%	33%	36%	22%			37%	39%	30%	35%	46%	38%
	Married/ Attn wedding	1%	3%	4%			100%			5%	3%		1%
	Honeymoon	4%	9%			33%		5%	4%	1%		100%	3%
	Pleasure	58%	53%	57%	44%	33%		61%	60%	54%	59%	54%	59%
	Organized sports	2%	2%	4%				3%	1%	4%	3%		
	Other	3%	3%					3%	3%	4%	6%		3%
	Total Count	351	119	28	9	3	4	115	257	83	34	13	128



INFORMATION SOURCES - SEGMENTATION

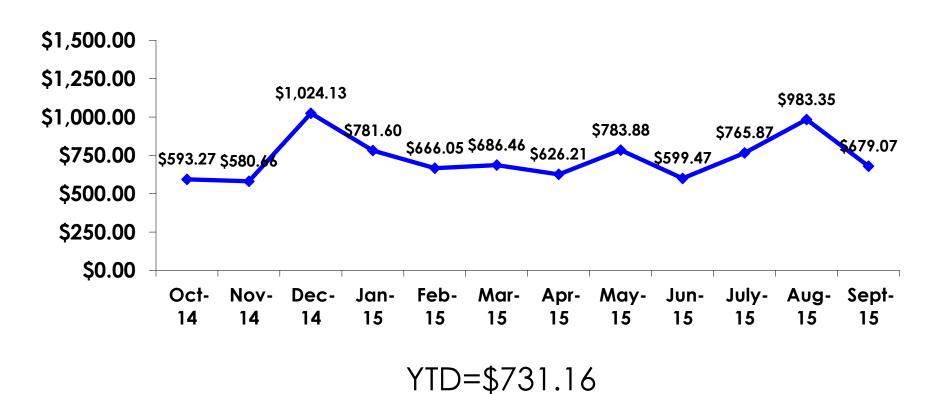
												HONEYMOO	
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	N	REPEAT
		-	-	-	-	-	-	-		•	•	•	-
Q1	Internet	86%	85%	93%	89%	67%	75%	87%	86%	87%	85%	77%	81%
	Travel Guidebook- Bookstore	54%	61%	50%	22%	100%	75%	59%	51%	61%	59%	54%	52%
	Travel Agent Brochure	40%	49%	32%	22%	67%	50%	49%	39%	46%	47%	62%	34%
	Friend/ Relative	37%	23%	29%	11%	33%	25%	39%	43%	18%	21%	31%	24%
	Magazine (Consumer)	36%	36%	43%	44%			44%	39%	33%	38%	38%	32%
	Prior Trip	25%	42%	39%		67%	25%	16%	19%	42%	59%	31%	70%
	TV	16%	11%	21%				15%	19%	7%	12%		17%
	Co-Worker/ Company Trvl Dept	3%	2%					5%	3%	1%			2%
	GVB Promo	1%	2%	4%				1%	1%	2%	3%		2%
	Newspaper	1%	2%	4%				2%	1%	1%			3%
	Consumer Trvl Show	1%						3%	2%				2%
	GVB Office	1%	1%					1%	0%	2%	3%		1%
	Other	0%						1%	0%				
	Total Cour	t 350	118	28	9	3	4	116	257	83	34	13	127



SECTION 3 EXPENDITURES



PREPAID EXPENDITURES TRACKING





PREPAID EXPENDITURES PER PERSON SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	•	•	1	-		•	•	-	-	-	-
PER PERSON	Mean	\$679.07	\$767.57	\$660.90	\$528.09	\$597.57	\$587.15	\$690.65	\$662.56	\$715.08	\$787.48	\$915.60	\$694.69
	Median	\$625	\$750	\$646	\$667	\$625	\$688	\$608	\$584	\$672	\$834	\$750	\$625
	Minimum	\$0	\$0	\$0	\$0	\$417	\$0	\$0	\$0	\$0	\$0	\$500	\$0
	Maximum	\$2,852	\$1,918	\$1,355	\$1,042	\$750	\$973	\$1,918	\$2,852	\$1,918	\$1,918	\$2,085	\$2,852

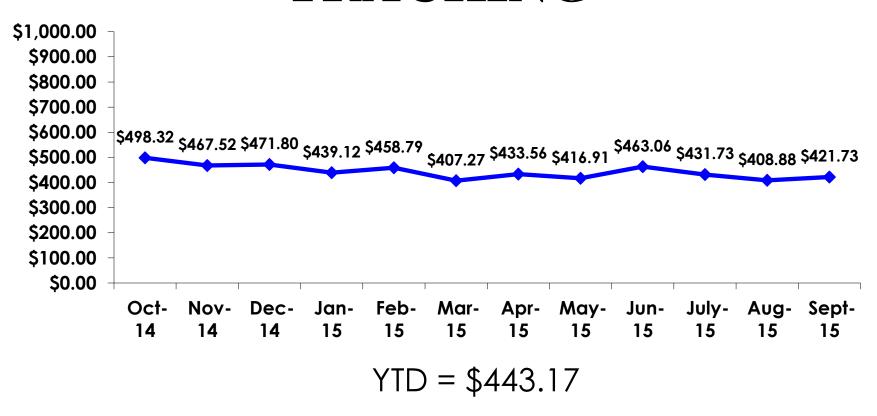


PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,149.86	\$2,105.55	\$906.33	\$1,032.75	\$1,083.97	\$2,654.33	\$1,066.36	\$950.37	\$1,776.87	\$3,054.16	\$1,396.65	\$1,376.54
	Median	\$750	\$1,668	\$625	\$667	\$917	\$1,501	\$750	\$667	\$1,251	\$2,918	\$1,230	\$917
AIR/HOTEL/MEAL	Mean	\$1,858.64	\$2,306.17	\$3,335.28				\$1,838.19	\$1,440.75	\$2,536.20	\$3,665.23	\$2,918.37	\$2,306.65
	Median	\$1,292	\$1,918	\$3,335				\$1,084	\$1,084	\$2,001	\$3,335	\$3,502	\$2,001
AIR ONLY	Mean	\$977.95	\$1,144.00	\$875.51				\$958.89	\$1,012.50	\$943.41	\$1,361.91		\$1,167.35
	Median	\$917	\$1,251	\$876				\$750	\$1,001	\$834	\$1,584		\$1,167
HOTEL ONLY	Mean	\$506.25	\$558.66	\$875.51				\$291.84	\$416.91	\$573.25	\$333.53		\$573.25
	Median	\$417	\$417	\$876				\$292	\$500	\$375	\$334		\$375
HOTEL & MEAL	Mean												
	Median												
F&B HOTEL	Mean												
	Median												
TRANS- JAPAN	Mean	\$44.49	\$42.66	\$39.90	\$25.01			\$31.55	\$45.71	\$40.23	\$34.19		\$42.08
	Median	\$25	\$29	\$17	\$25			\$21	\$25	\$25	\$33		\$25
TRANS- GUAM	Mean	\$24.60	\$33.35	\$41.69				\$26.06	\$22.85	\$33.35			\$21.68
	Median	\$25	\$33	\$42				\$25	\$17	\$33			\$22
OPT TOURS	Mean	\$164.03	\$279.93	\$166.76		\$166.76		\$158.08	\$145.76	\$258.48	\$339.09		\$119.12
	Median	\$158	\$250	\$167		\$167		\$108	\$142	\$250	\$250		\$117
OTHER	Mean	\$123.56	\$125.07	\$108.40		\$166.76		\$111.18	\$134.45	\$58.37			\$105.62
	Median	\$83	\$125	\$108		\$167		\$83	\$125	\$58			\$83
TOTAL	Mean	\$1,165.56	\$1,979.54	\$895.91	\$806.03	\$1,195.14	\$1,990.74	\$1,108.35	\$948.03	\$1,760.14	\$2,804.92	\$1,747.81	\$1,399.64
	Median	\$792	\$1,668	\$646	\$667	\$1,251	\$1,063	\$792	\$667	\$1,251	\$2,793	\$1,251	\$1,001



ON-ISLAND EXPENDITURES TRACKING





ON-ISLAND EXPENDITURES PER PERSON SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	•	-	-	-	-
PER PERSON	Mean	\$421.73	\$440.55	\$404.63	\$323.06	\$673.17	\$363.75	\$475.35	\$396.08	\$478.24	\$277.48	\$560.00	\$427.80
	Median	\$350	\$333	\$ 358	\$250	\$700	\$245	\$400	\$350	\$333	\$205	\$500	\$355
	Minimum	\$0	\$0	\$40	\$150	\$152	\$25	\$0	\$0	\$0	\$0	\$250	\$0
	Maximum	\$3,500	\$2,500	\$1,090	\$670	\$1,168	\$940	\$3,500	\$2,500	\$3,500	\$1,030	\$1,000	\$1,805

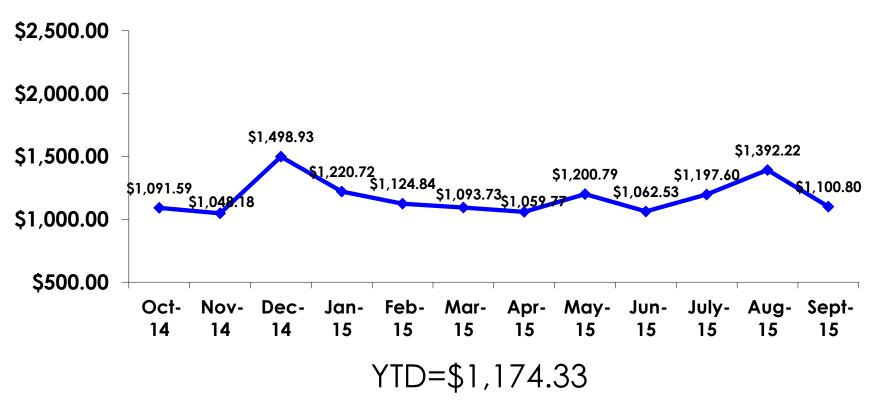


ON-ISLAND EXPENSE-BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$36.69	\$88.92	\$13.93	\$2.33	\$346.67	\$50.00	\$36.64	\$16.86	\$82.60	\$131.56	\$57.69	\$61.52
F&B FF/STORE	Mean	\$37.58	\$63.45	\$28.46	\$43.33	\$22.00	\$17.50	\$46.01	\$31.77	\$48.80	\$46.18	\$56.92	\$41.45
F&B RESTRNT	Mean	\$85.31	\$147.67	\$39.29	\$52.22	\$114.00	\$12.50	\$94.76	\$61.87	\$146.04	\$121.88	\$106.15	\$103.52
OPT TOUR	Mean	\$68.09	\$120.78	\$46.00	\$27.78	\$316.67	\$0.00	\$118.21	\$49.01	\$108.24	\$53.68	\$97.69	\$73.18
GIFT- SELF	Mean	\$125.28	\$194.09	\$132.57	\$47.78	\$115.33	\$187.50	\$103.84	\$110.50	\$171.13	\$196.18	\$267.69	\$142.97
GIFT- OTHER	Mean	\$103.02	\$149.66	\$74.64	\$120.00	\$150.00	\$50.00	\$112.04	\$77.75	\$166.33	\$126.47	\$123.85	\$100.32
TRANS	Mean	\$14.41	\$23.01	\$6.86	\$12.78	\$38.33	\$45.00	\$18.07	\$8.00	\$29.43	\$33.06	\$10.15	\$26.03
OTHER	Mean	\$139.64	\$162.37	\$105.71	\$112.67	\$10.00	\$130.00	\$152.32	\$133.62	\$140.84	\$156.65	\$261.38	\$152.19
TOTAL	Mean	\$611.90	\$956.09	\$447.46	\$418.89	\$1,113.00	\$492.50	\$690.07	\$491.89	\$893.53	\$865.65	\$981.54	\$701.88



TOTAL EXPENDITURES – TRACKING





TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	•	-
TOTAL PER PERSON	Mean	\$1,100.80	\$1,208.12	\$1,065.53	\$851.14	\$1,270.74	\$950.90	\$1,166.00	\$1,058.64	\$1,193.32	\$1,064.95	\$1,475.60	\$1,122.49
	Median	\$1,000	\$1,121	\$1,126	\$867	\$1,450	\$999	\$1,030	\$967	\$1,084	\$1,063	\$1,450	\$1,045
	Minimum	\$0	\$0	\$56	\$250	\$777	\$240	\$0	\$0	\$0	\$0	\$792	\$40
	Maximum	\$4,100	\$3,084	\$1,924	\$1,712	\$1,584	\$1,565	\$4,100	\$3,252	\$4,100	\$2,101	\$2,385	\$3,252



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.

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Comparison of Drivers of Over	all Satis	faction		lov, Dec ct-2014			o, Mar, A	Apr, Ma	ıy, Jun,	Jul, Aug	2015 ,	and Ov	/erall
			Dec-					May-			Aug-		Comb ned Oct- 2014 - Sep
	Oct-14	Nov-14		Jan-15	Feb-15	Mar-15	Apr-15		Jun-15	Jul-15		Sep-15	
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks		3			3	2		2			4	5	4
Ease of getting around										4			9
Safety walking around at night													
Quality of daytime tours		5	4									4	6
Variety of daytime tours													
Quality of nighttime tours													
Variety of nighttime tours													
Quality of shopping	3				4	3		3		2	3	2	2
Variety of shopping		4		2					4				
Price of things on Guam													
Quality of hotel													
accommodations			2		5	1	4			5	2	1	3
Quality/cleanliness of air, sky							1	4	1				
Quality/cleanliness of parks		1											
Quality of landscape in Tumon	2							1	3		1		8
Quality of landscape in Guam		2	1	1	1		3			3		3	1
Quality of ground handler	1						2		2	1	5		7
Quality/cleanliness of transportation vehicles			3	3	2			5					5
% of Overall Satisfaction Accounted For	47.0%	52.7%	37 9%	35.6%	44.5%	33.0%	45.6%	53 5%	50.6%	52 7%	42 9%	50.7%	44 6%
NOTE: Only significant drivers are			07.770	1 50.070	17.0/0	00.070	10.070	00.070	1 00.070	02.7 /0	12.7/0	1 30.7 70	17.070



DRIVERS OF OVERALL SATISFACTION

- Overall satisfaction with the Japanese visitor's experience on Guam is driven by five significant factors in the September 2015 Period. By rank order they are:
 - Quality of hotel accommodations,
 - Quality of shopping,
 - Quality of landscape in Guam,
 - Quality of day time tours, and
 - Quality & cleanliness of beaches & parks.
- With all five factors the overall r² is .507 meaning that **50.7%** of overall satisfaction is accounted for by these factors.



Comparison of Drivers of Per P	erson O		-	nditures d Overa				lan, Fel	o, Mar, A	Apr, Ma	y, Jun,	Jul, Aug	, Sep
	Oct-14	Nov-14	Dec-				Apr-15	May- 15	Jun-15	Jul-15	Aug- 15	Sep-15	Combi ned Oct- 2014- Sep 2015
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of													
beaches & parks													1
Ease of getting around			1										3
Safety walking around at night													
Quality of daytime tours													
Variety of daytime tours													
Quality of nighttime tours													
Variety of nighttime tours													
Quality of shopping								1					2
Variety of shopping			2										
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%	5.3%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.9%
NOTE: Only significant drivers are	e includ	ed.											



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 September 2015 Period.