



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2016 Market Segmentation

MARCH 2016



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 **356** 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 **356** 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

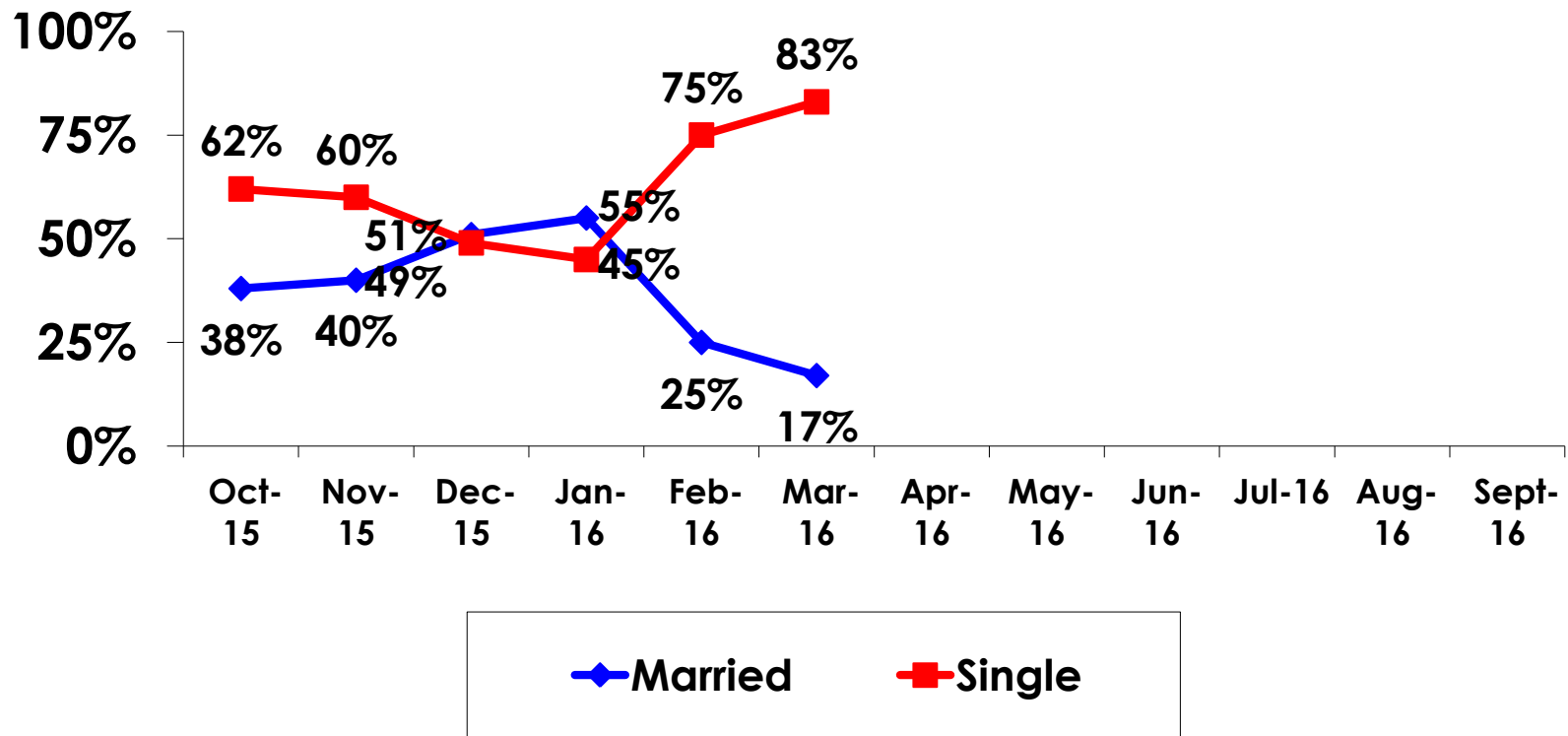
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

Highlighted Segments

	Oct 15	Nov 15	Dec 15	Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16	July 16	Aug 16	Sept 16
Families	31%	36%	48%	56%	25%	18%						
Office Lady	9%	12%	10%	12%	10%	7%						
Group	5%	7%	5%	1%	6%	5%						
Silver	6%	2%	4%	5%	2%	3%						
Wedding	7%	9%	3%	3%	4%	3%						
Sport	31%	37%	33%	37%	29%	40%						
18-35	73%	66%	55%	49%	81%	85%						
36-55	19%	29%	37%	44%	15%	10%						
Child	6%	14%	26%	35%	7%	5%						
Honey-moon	7%	3%	5%	2%	3%	2%						
Repeat	35%	46%	50%	56%	32%	26%						
TOTAL	351	351	356	353	354	356						5

SECTION 1 **PROFILE OF RESPONDENTS**

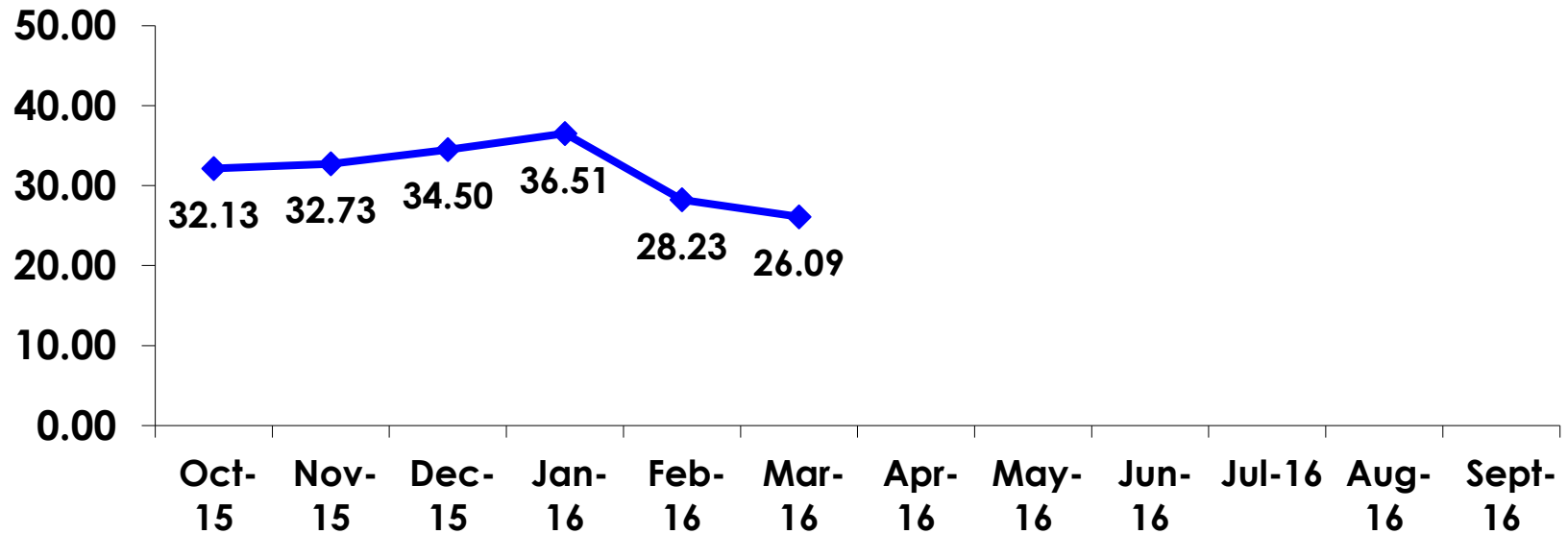
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	17%	74%	33%	19%	100%	67%	13%	7%	73%	84%	100%	28%
	Single	83%	26%	67%	81%		33%	87%	93%	27%	16%		72%
	Total Count	355	65	24	16	9	9	144	303	37	19	7	94

AVERAGE AGE - TRACKING



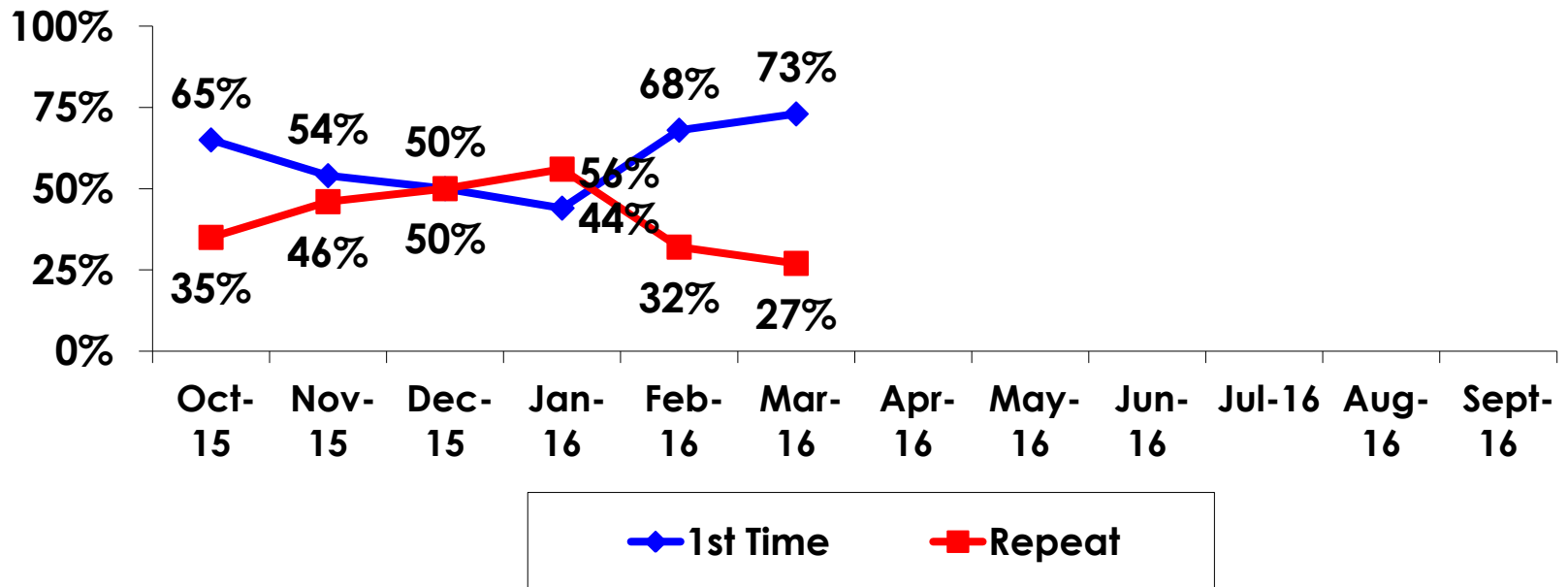
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	71%	18%	33%	69%			69%	83%		5%		54%
	25-34	14%	23%	33%	19%		56%	18%	17%		16%	86%	14%
	35-49	10%	34%	25%	6%		11%	10%	1%	86%	68%	14%	20%
	50+	5%	25%	8%	6%	100%	33%	2%		14%	11%		12%
	Total Count	352	65	24	16	9	9	144	303	37	19	7	94
QF	Mean	26.09	39.46	32.88	24.81	63.56	38.78	25.53	22.52	43.68	40.00	27.86	31.01
	Median	22	36	27	22	64	31	22	22	44	40	27	24

INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	13%	3%		8%			11%	16%				9%
	Y2.0M-Y3.0M	10%	6%	25%	8%		22%	13%	10%	14%		14%	10%
	Y3.0M-Y4.0M	10%	14%	21%	31%	33%	11%	9%	10%	5%	5%	29%	12%
	Y4.0M-Y5.0M	13%	14%	17%		44%	22%	11%	12%	14%	21%		14%
	Y5.0M-Y7.0M	14%	14%	4%	23%	11%	11%	15%	13%	16%	21%	29%	12%
	Y7.0M-Y10.0M	15%	20%	8%			22%	17%	16%	19%	32%	29%	15%
	Y10.0M+	18%	27%	25%	15%	11%	11%	18%	16%	32%	21%		23%
	No Income	6%	2%		15%			6%	7%				5%
	Total Count	295	64	24	13	9	9	131	242	37	19	7	86

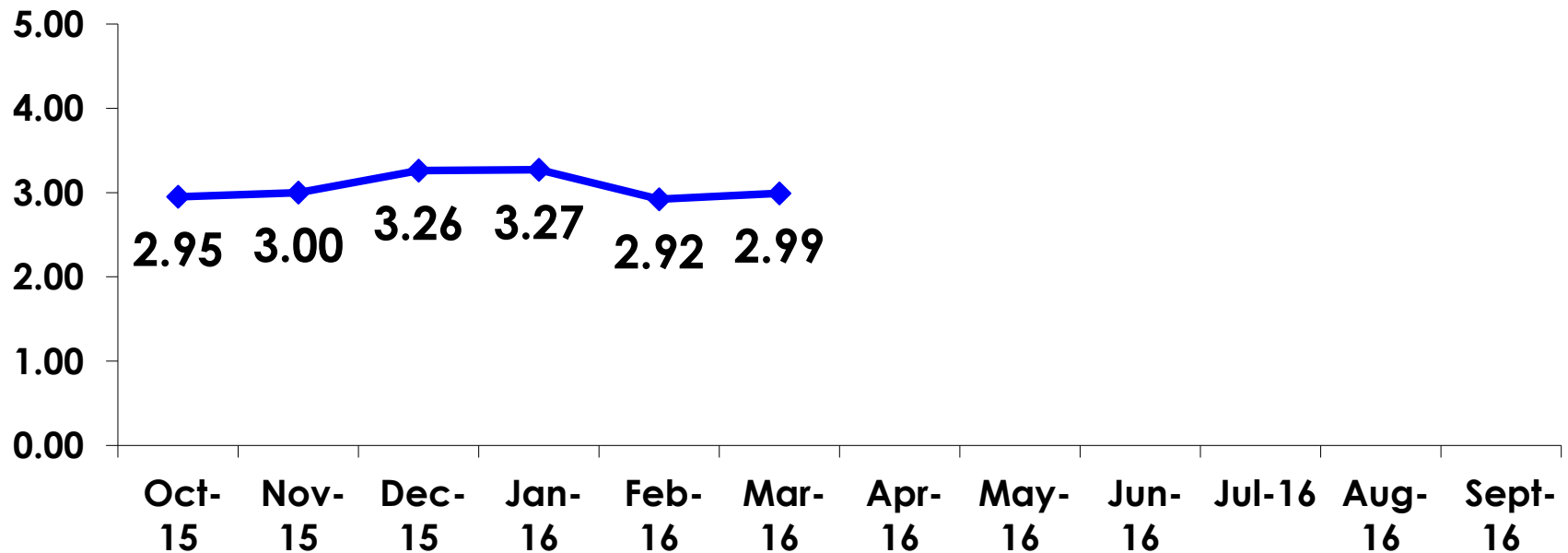
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	73%	56%	50%	71%	33%	67%	71%	78%	43%	58%	100%	
	No	27%	44%	50%	29%	67%	33%	29%	22%	57%	42%		100%
	Total Count	354	64	24	17	9	9	143	301	37	19	6	94

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	2.99	3.11	2.83	3.35	2.89	2.89	2.96	2.98	3.19	3.11	4.00	3.13
	Median	3	3	3	3	3	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	69%	63%	75%		89%	44%	69%	70%	56%	78%	43%	63%	
	Full package tour	23%	24%	21%		11%	11%	25%	23%	25%	11%	43%	24%	
	Group tour	5%	3%	4%	100%			3%	5%	6%			5%	
	Individually arranged travel (FIT)	3%	10%				44%	2%	2%	14%	11%	14%	6%	
	Company paid travel	0%						1%	0%				1%	
	Total	Count	352	63	24	17	9	9	142	301	36	18	7	94

TRAVEL MOTIVATION - SEGMENTATION

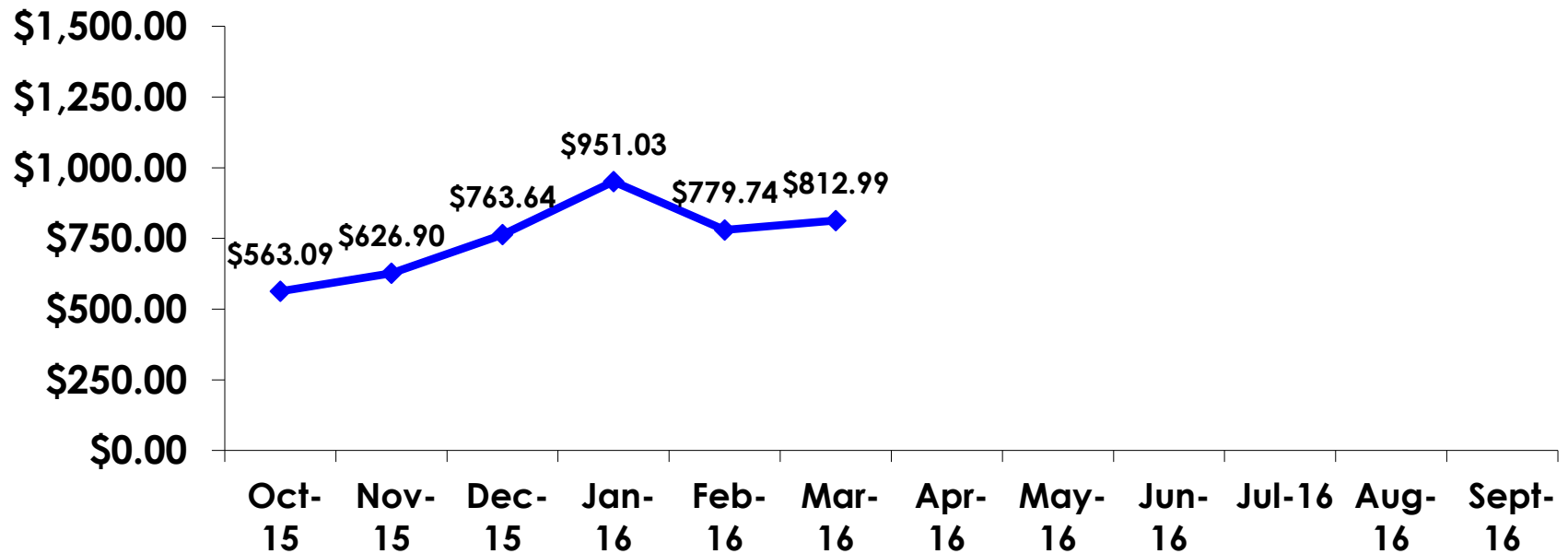
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	22%	41%	38%	29%	67%	22%	22%	17%	46%	42%		81%	
	Price	25%	17%	38%	6%	11%		24%	24%	35%	21%		24%	
	Visit friends/ Relatives	3%	2%					2%	4%		5%		1%	
	Recomm- friend/family/trvl agnt	36%	19%	38%	35%	33%		34%	38%	16%	11%		26%	
	Scuba	7%	3%	8%	12%			13%	8%			14%	5%	
	Water sports	26%	14%	17%	18%	22%		35%	28%	11%	16%		21%	
	Short travel time	47%	45%	54%	12%	44%	33%	48%	47%	43%	47%	43%	47%	
	Golf	3%	2%	13%				5%	1%	14%			5%	
	Relax	28%	27%	46%	12%	33%	11%	26%	28%	27%	26%	14%	29%	
	Company/ Business Trip	2%	3%	4%	12%			2%	1%	5%			3%	
	Company Sponsored	1%	3%		6%			1%	1%	3%	11%		1%	
	Convention/ Trade/ Conference	0%							0%					
	Safe	25%	34%	21%	24%	33%	11%	27%	23%	35%	42%	43%	27%	
	Natural beauty	64%	64%	71%	29%	67%	11%	66%	65%	57%	53%	57%	59%	
	Shopping	32%	34%	46%	24%	33%	11%	27%	33%	38%	37%	29%	34%	
	Career Cert/ Testing	0%							0%				1%	
	Married/ Attn wedding	3%	11%			11%	100%	1%	2%	5%	11%	29%	3%	
	Honeymoon	2%	11%	4%			22%	3%	2%	3%		100%		
	Pleasure	60%	50%	54%	35%	44%	22%	65%	62%	49%	53%	43%	50%	
	Organized sports	2%	3%		29%		11%	2%	2%		5%		4%	
	Other	6%	2%					9%	7%	3%			3%	
	Total	Count	351	64	24	17	9	9	143	298	37	19	7	94

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	82%	78%	88%	88%	78%	56%	77%	83%	81%	89%	86%	77%	
	Travel Agent Brochure	49%	52%	46%	18%	44%	33%	56%	49%	57%	63%	57%	38%	
	Travel Guidebook-Bookstore	47%	58%	54%	24%	33%	56%	52%	45%	62%	68%	71%	45%	
	Friend/ Relative	44%	25%	54%	41%		33%	51%	49%	19%	21%	71%	27%	
	Magazine (Consumer)	37%	34%	42%	41%	33%	22%	34%	36%	35%	37%	29%	33%	
	Prior Trip	26%	43%	50%	29%	67%	33%	28%	21%	57%	42%		98%	
	TV	12%	8%	17%	24%			11%	13%	11%	11%	29%	6%	
	Consumer Trvl Show	6%	5%	4%		11%	22%	7%	6%	3%	5%	14%	4%	
	Co-Worker/ Company Trvl Dept	2%	3%	8%	12%			3%	2%	3%		14%	1%	
	Newspaper	1%	2%	4%	6%	11%		1%	1%				2%	
	Travel Trade Show	1%					11%	1%	1%	3%			2%	
	Other	1%	2%			11%	11%		0%					
	Radio	1%					11%	1%	0%	3%			1%	
	GVB Office	1%					11%	1%	0%	3%			2%	
	GVB Promo	1%	2%			11%	11%			3%			1%	
	Theater Ad	0%					11%			3%			1%	
	Total	Count	356	65	24	17	9	9	144	303	37	19	7	94

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$749.98

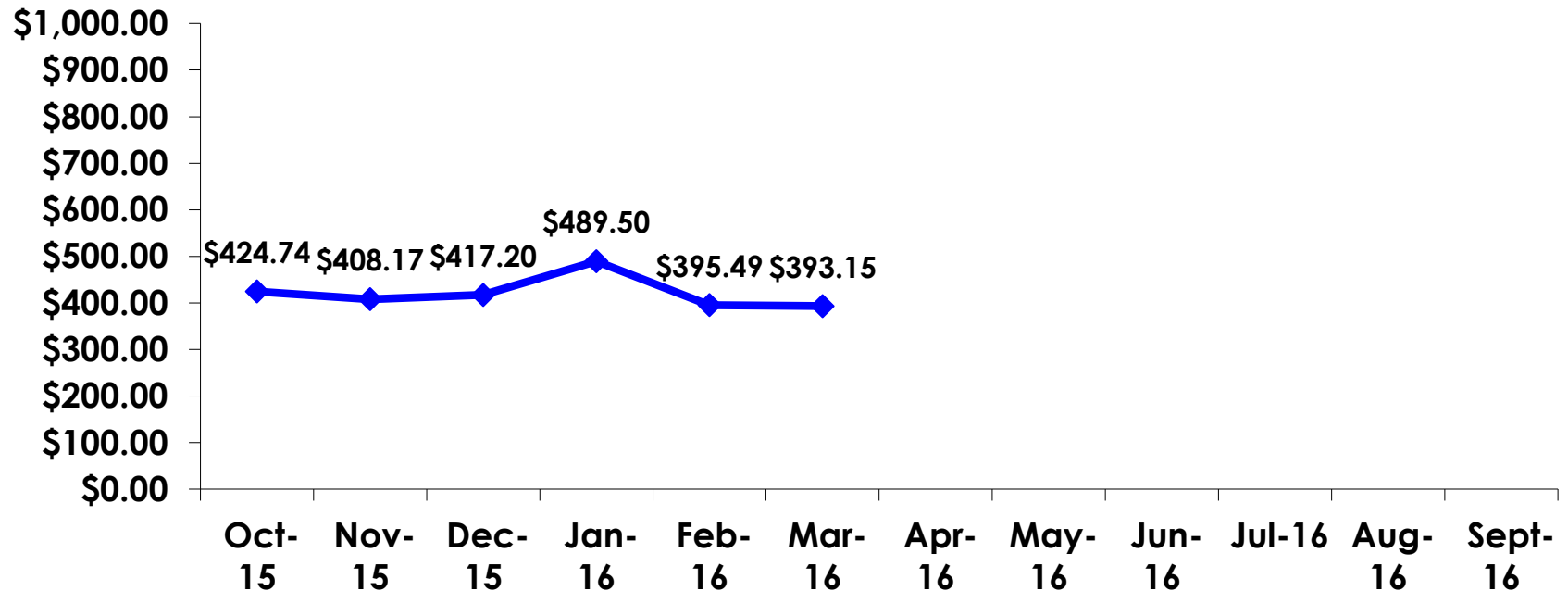
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$812.99	\$1,042.14	\$834.66	\$523.44	\$1,194.82	\$1,149.27	\$826.98	\$786.03	\$881.49	\$1,006.72	\$1,728.62	\$811.44
	Median	\$720	\$1,010	\$747	\$509	\$1,142	\$1,098	\$780	\$703	\$878	\$878	\$1,757	\$755
	Minimum	\$0	\$0	\$0	\$0	\$615	\$0	\$0	\$0	\$0	\$0	\$1,318	\$0
	Maximum	\$7,027	\$2,635	\$2,635	\$1,713	\$1,933	\$2,196	\$4,392	\$7,027	\$1,757	\$2,196	\$2,635	\$2,196

PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,279.61	\$2,763.00	\$1,053.80	\$650.04	\$3,425.86	\$3,708.21	\$1,242.01	\$1,102.85	\$2,249.96	\$3,475.64	\$2,620.64	\$1,491.19
	Median	\$771	\$2,635	\$878	\$615	\$3,250	\$3,074	\$791	\$720	\$2,372	\$2,811	\$2,635	\$791
AIR/ HOTEL/ MEAL	Mean	\$1,955.45	\$2,866.86	\$1,704.15	\$1,449.40	\$1,914.97	\$3,777.23	\$2,136.66	\$1,902.27	\$2,340.38	\$4,611.74	\$3,777.23	\$1,969.56
	Median	\$1,265	\$2,635	\$1,515	\$1,581	\$966	\$3,777	\$1,252	\$1,647	\$1,265	\$4,612	\$3,777	\$1,647
AIR ONLY	Mean	\$600.26	\$966.27	.	\$439.21	.	.	\$351.37	\$417.25	\$966.27	\$1,756.85	.	\$307.45
	Median	\$439	\$966	.	\$439	.	.	\$439	\$439	\$966	\$1,757	.	\$307
HOTEL ONLY	Mean	\$380.65	\$878.43	.	.	.	.	\$131.76	\$131.76	\$878.43	\$878.43	.	\$219.61
	Median	\$220	\$878	.	.	.	.	\$132	\$132	\$878	\$878	.	\$220
HOTEL & MEAL	Mean	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.
F&B HOTEL	Mean	\$168.00	\$351.37	.	.	.	.	\$13.18	\$106.88	.	.	.	\$351.37
	Median	\$154	\$351	.	.	.	.	\$13	\$44	.	.	.	\$351
TRANS- JAPAN	Mean	\$85.87	\$198.92	\$60.93	.	\$158.12	\$43.92	\$36.32	\$48.42	\$168.10	.	\$43.92	\$160.65
	Median	\$33	\$88	\$27	.	\$158	\$44	\$26	\$26	\$88	.	\$44	\$26
TRANS- GUAM	Mean	\$52.71	.	.	.	.	.	.	\$65.88	\$26.35	.	.	\$57.10
	Median	\$44	.	.	.	.	.	.	\$66	\$26	.	.	\$57
OPT TOURS	Mean	\$276.16	\$450.93	\$375.53	.	\$17.57	\$439.21	\$386.63	\$281.76	\$257.67	\$535.84	\$1,171.23	\$160.26
	Median	\$141	\$176	\$154	.	\$18	\$439	\$176	\$176	\$154	\$264	\$439	\$114
OTHER	Mean	\$286.39	\$369.91	\$1,141.95	\$175.69	.	.	\$223.35	\$278.65	\$237.17	\$284.02	\$570.98	\$461.57
	Median	\$154	\$351	\$703	\$176	.	.	\$149	\$114	\$176	\$264	\$571	\$176
TOTAL	Mean	\$1,362.41	\$2,720.62	\$1,373.67	\$569.94	\$2,625.52	\$3,357.54	\$1,386.36	\$1,175.48	\$2,190.86	\$3,497.52	\$3,457.23	\$1,517.71
	Median	\$861	\$2,635	\$813	\$527	\$2,635	\$3,514	\$878	\$791	\$2,038	\$2,811	\$3,514	\$861

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$421.32

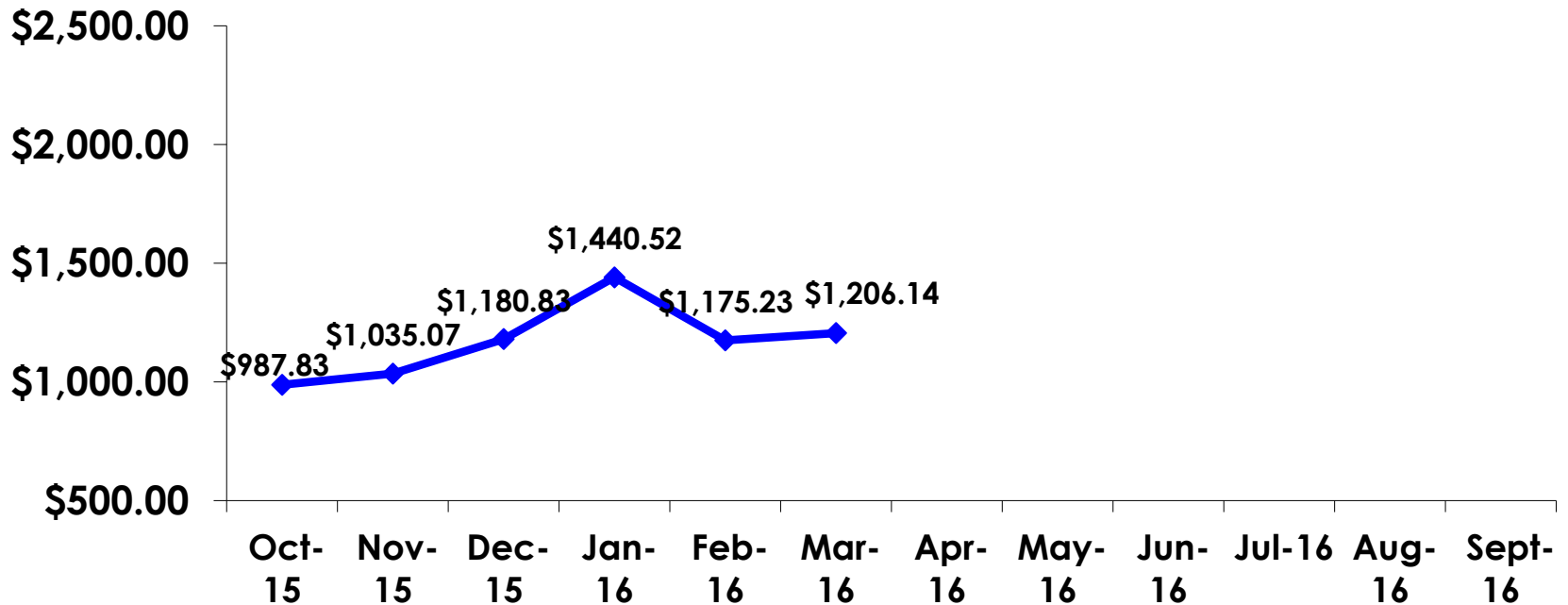
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$393.15	\$518.73	\$395.71	\$351.65	\$701.48	\$694.44	\$370.74	\$371.82	\$499.83	\$444.83	\$493.14	\$432.64
	Median	\$300	\$385	\$300	\$250	\$500	\$450	\$300	\$300	\$400	\$500	\$450	\$322
	Minimum	\$0	\$0	\$0	\$0	\$250	\$150	\$0	\$0	\$0	\$0	\$250	\$0
	Maximum	\$2,665	\$2,500	\$1,735	\$1,000	\$2,500	\$2,500	\$2,000	\$2,665	\$1,815	\$1,000	\$780	\$2,665

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	\$31.69	\$99.80	\$45.00	\$4.59	\$115.56	\$127.78	\$29.51	\$21.48	\$92.70	\$46.32	\$155.71	\$43.28
F&B FF/STORE	Mean	\$38.12	\$78.85	\$20.83	\$25.12	\$46.67	\$40.00	\$39.70	\$33.23	\$75.95	\$105.79	\$162.86	\$36.49
F&B RESTRNT	Mean	\$78.67	\$149.72	\$64.17	\$44.71	\$422.22	\$281.11	\$83.82	\$65.31	\$94.86	\$103.95	\$35.71	\$73.83
OPT TOUR	Mean	\$57.79	\$105.74	\$45.42	\$47.06	\$107.78	\$28.89	\$73.61	\$53.89	\$77.24	\$110.26	\$180.00	\$64.59
GIFT- SELF	Mean	\$130.19	\$342.42	\$164.58	\$100.00	\$335.56	\$211.11	\$107.70	\$89.37	\$426.22	\$407.37	\$75.71	\$215.13
GIFT- OTHER	Mean	\$85.72	\$192.82	\$162.92	\$44.12	\$277.78	\$233.33	\$75.97	\$68.98	\$175.86	\$96.32	\$272.86	\$101.94
TRANS	Mean	\$10.26	\$15.45	\$6.54	\$4.06	\$27.78	\$1.11	\$12.01	\$9.33	\$15.27	\$12.37	\$2.00	\$11.41
OTHER	Mean	\$134.13	\$227.88	\$20.63	\$82.00	\$217.78	\$360.00	\$94.35	\$123.80	\$164.24	\$364.74	\$101.43	\$124.98
TOTAL	Mean	\$566.56	\$1,212.66	\$530.08	\$351.65	\$1,551.11	\$1,283.33	\$516.68	\$465.39	\$1,122.35	\$1,247.11	\$986.29	\$671.64

TOTAL EXPENDITURES – TRACKING



YTD=\$1,171.30

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	\$1,206.14	\$1,560.87	\$1,230.36	\$875.09	\$1,896.30	\$1,843.72	\$1,197.72	\$1,157.85	\$1,381.32	\$1,451.56	\$2,221.76	\$1,244.08
	Median	\$1,100	\$1,483	\$1,152	\$865	\$1,668	\$1,298	\$1,107	\$1,078	\$1,227	\$1,269	\$2,107	\$1,102
	Minimum	\$0	\$90	\$0	\$130	\$948	\$300	\$90	\$0	\$0	\$500	\$1,770	\$90
	Maximum	\$7,527	\$4,433	\$3,140	\$1,963	\$4,433	\$4,433	\$4,592	\$7,527	\$3,140	\$3,196	\$2,885	\$3,983

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 2015, Jan, Feb, Mar 2016, and Overall Oct-2015 - Mar 2016							
	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16	Combine d Oct- 2015 - Mar 2016
Drivers:	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	4	4	3				4
Ease of getting around							
Safety walking around at night							
Quality of daytime tours				2			8
Variety of daytime tours	5						
Quality of nighttime tours							
Variety of nighttime tours							
Quality of shopping		3			2	4	
Variety of shopping	2			5			3
Price of things on Guam				1			
Quality of hotel accommodations			2			2	5
Quality/cleanliness of air, sky			4				7
Quality/cleanliness of parks					1		
Quality of landscape in Tumon	1	1	1	3			1
Quality of landscape in Guam					4	1	
Quality of ground handler						3	6
Quality/cleanliness of transportation vehicles	3	2		4	3	5	2
% of Overall Satisfaction Accounted For	65.6%	46.7%	53.1%	45.9%	44.2%	50.0%	47.9%

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 March 2016 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Quality of hotel accommodations,**
 - **Quality of ground handler,**
 - **Quality of shopping, and**
 - **Quality/cleanliness of transportation vehicles.**
- With all five factors the overall r^2 is .500 meaning that **50.0% of overall satisfaction is accounted for by these factors.**

**Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2015, Jan, Feb, Mar 2016
and Overall Oct-2015-Mar 2016**

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16	Combine d Oct- 2015- Mar 2016
Drivers:	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks							
Ease of getting around				3			
Safety walking around at night		2					
Quality of daytime tours	3						
Variety of daytime tours							
Quality of nighttime tours							
Variety of nighttime tours				2			2
Quality of shopping				1			1
Variety of shopping						1	
Price of things on Guam				4			
Quality of hotel accommodations	1						
Quality/cleanliness of air, sky							
Quality/cleanliness of parks	2	1					
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	4.8%	4.8%	0.0%	12.8%	0.0%	1.9%	1.9%

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 one significant factor in the March 2016 Period. It is:
 - **Variety of shopping.**
- With this factor the overall r^2 is .019 meaning that **1.9% of per person on island expenditure is accounted for by this factor.**