



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015 Market Segmentation

MAY 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

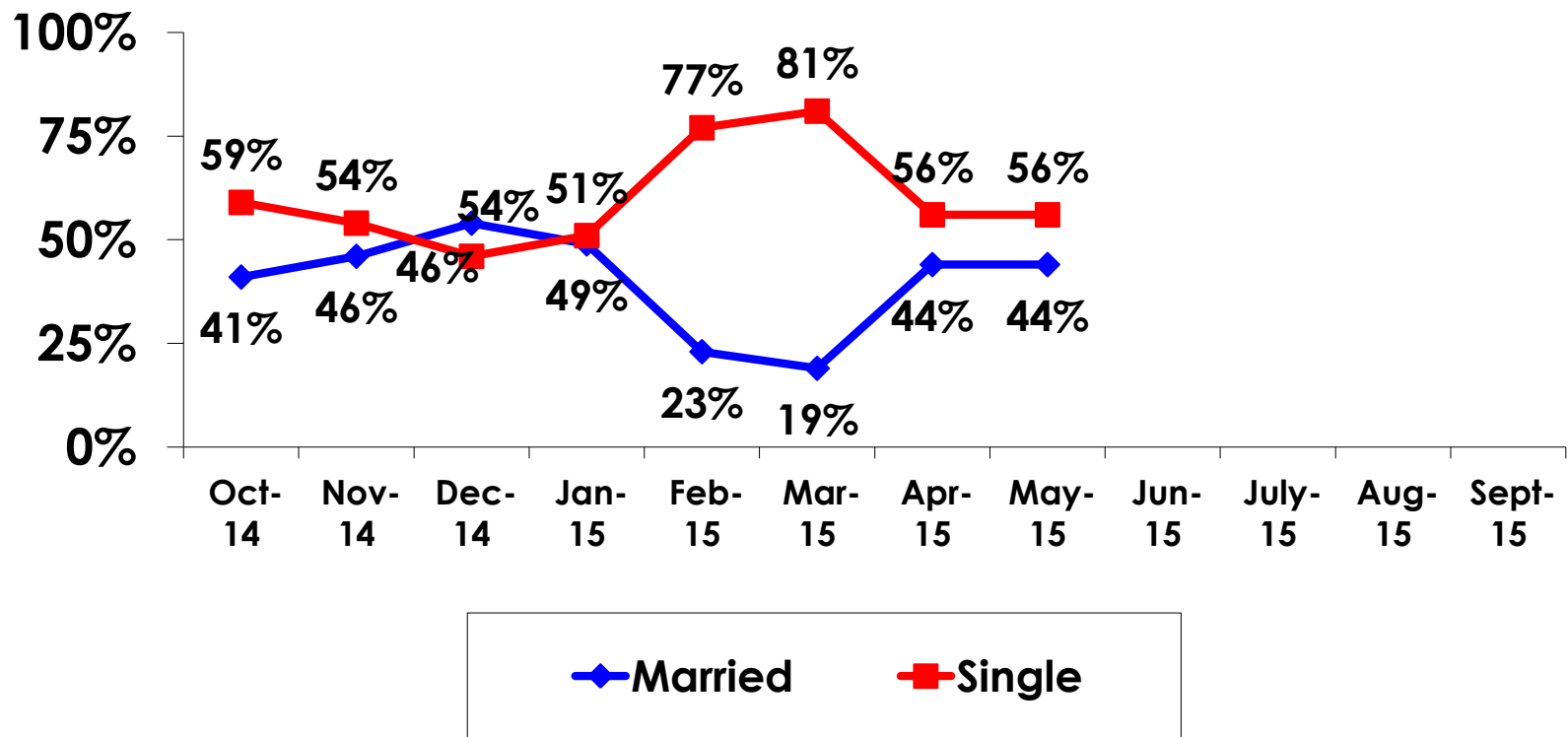
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%				
Office Lady	13%	11%	10%	12%	8%	2%	9%	16%				
Group	5%	3%	1%	4%	5%	4%	5%	3%				
Silver	2%	5%	3%	5%	3%	0%	4%	4%				
Wedding	9%	6%	0%	3%	2%	1%	6%	6%				
Sport	32%	29%	35%	27%	33%	41%	32%	29%				
18-35	71%	63%	48%	56%	83%	84%	60%	62%				
36-55	25%	29%	46%	36%	13%	13%	34%	30%				
Child	11%	12%	35%	19%	7%	10%	13%	13%				
Honey-moon	4%	5%	3%	4%	4%	2%	5%	4%				
Repeat	43%	43%	51%	50%	34%	25%	45%	43%				
TOTAL	351	350	351	350	350	352	352	352				

SECTION 1 **PROFILE OF RESPONDENTS**

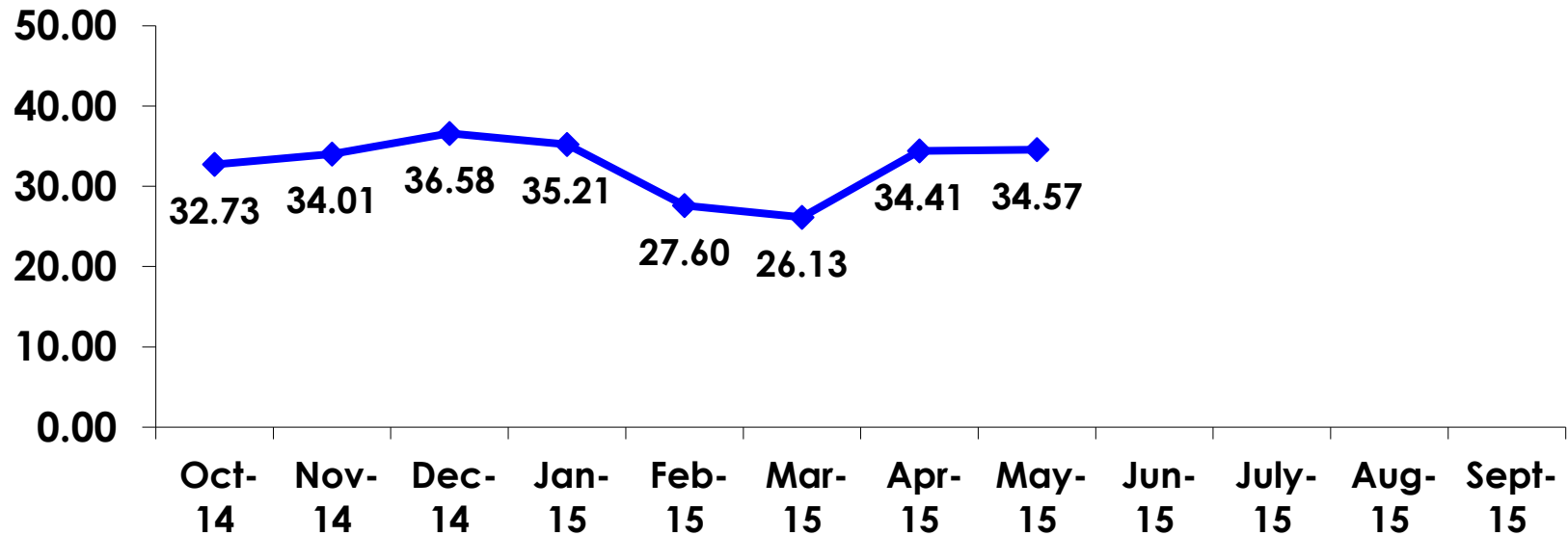
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	44%	84%	14%	11%	87%	55%	35%	24%	76%	93%	92%	53%
	Single	56%	16%	86%	89%	13%	45%	65%	76%	24%	7%	8%	47%
	Total Count	351	157	56	9	15	20	102	216	107	46	13	152

AVERAGE AGE - TRACKING



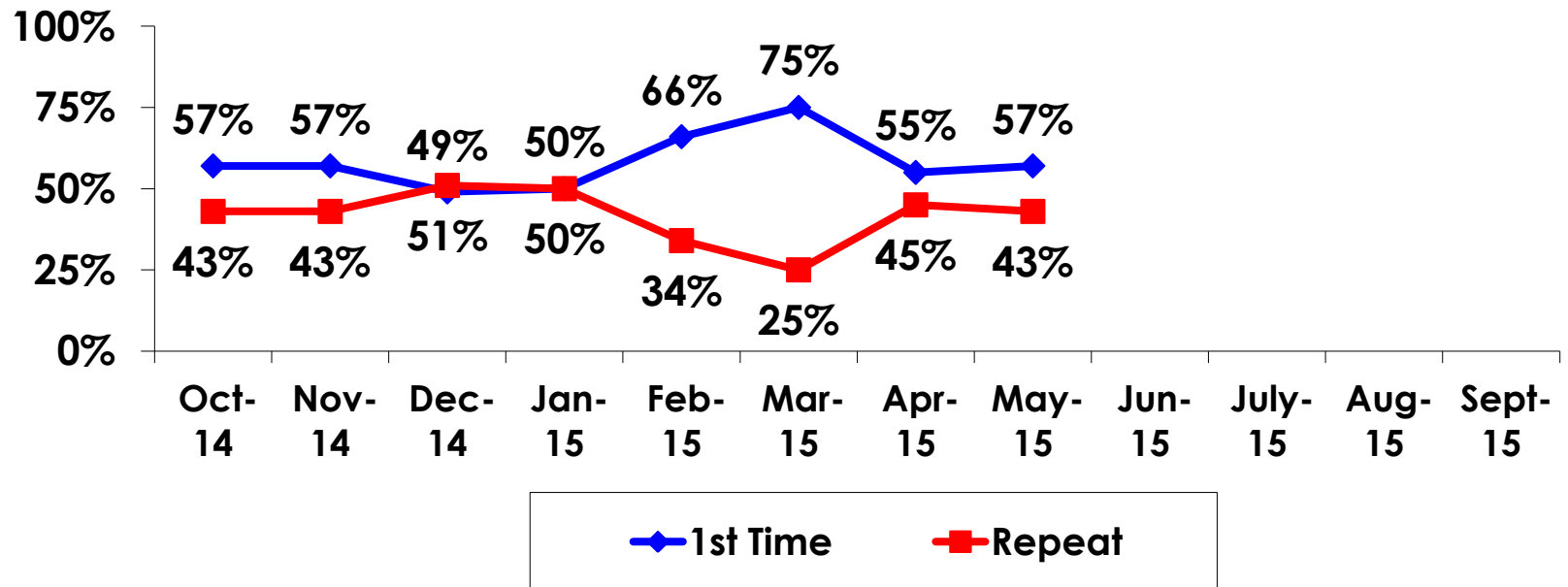
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	16%	6%	16%	44%		20%	14%	26%		4%	8%	6%
	25-34	43%	31%	57%	44%		45%	50%	70%		13%	69%	44%
	35-49	29%	45%	13%	11%		5%	27%	5%	85%	72%	23%	36%
	50+	12%	17%	14%		100%	30%	9%		15%	11%		13%
	Total Count	351	157	56	9	15	20	103	217	107	46	13	151
QF	Mean	34.57	39.01	32.82	26.56	63.53	37.15	33.60	27.04	43.18	39.91	30.92	36.69
	Median	30	40	28	25	64	32	30	27	42	41	30	34

INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	5%	5%	6%	20%	8%	12%	5%	7%	1%		15%	4%
	Y2.0M-Y3.0M	12%	8%	21%		8%	29%	15%	17%	3%	7%	15%	9%
	Y3.0M-Y4.0M	15%	11%	25%		15%	12%	11%	20%	7%	10%	38%	14%
	Y4.0M-Y5.0M	17%	12%	23%	60%	31%		17%	18%	13%	10%		17%
	Y5.0M-Y7.0M	20%	18%	13%		8%	12%	17%	18%	28%	26%	23%	23%
	Y7.0M-Y10.0M	16%	28%	4%		8%	24%	20%	6%	34%	36%	8%	18%
	Y10.0M+	12%	16%	8%	20%	15%	12%	12%	11%	12%	10%		13%
	No Income	3%	2%			8%		2%	3%	2%	2%		1%
	Total Count	311	146	48	5	13	17	93	187	100	42	13	137

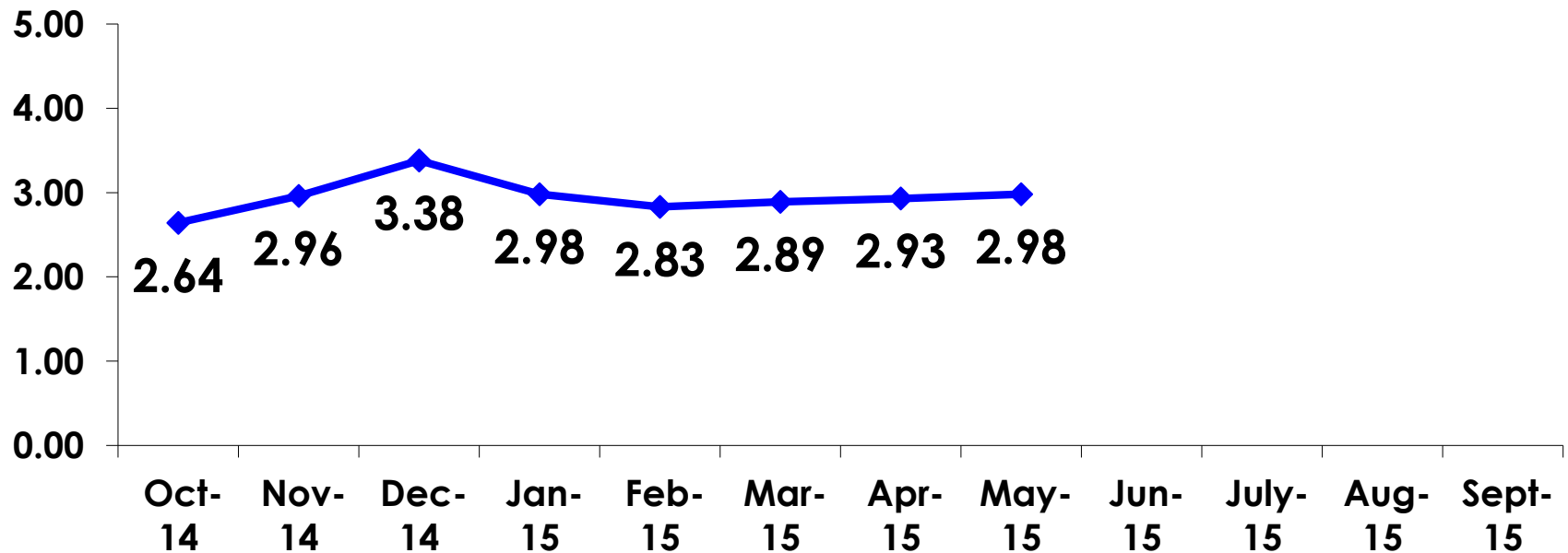
PRIOR TRIPS TO GUAM - TRACKING



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%	49%	70%	56%	53%	80%	60%	62%	46%	41%	67%	
	No	43%	51%	30%	44%	47%	20%	40%	38%	54%	59%	33%	100%
	Total Count	350	156	56	9	15	20	103	216	106	46	12	152

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	2.98	3.31	2.63	3.00	3.80	3.20	3.05	2.82	3.24	3.41	3.54	3.18
	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	65%	59%	71%		47%	56%	67%	68%	62%	59%	85%	61%	
	Full package tour	21%	24%	24%		20%	11%	25%	20%	21%	17%	15%	19%	
	Individually arranged travel (FIT)	10%	14%	2%		27%	11%	6%	7%	13%	22%		15%	
	Group tour	3%	2%	2%	100%		11%	2%	4%	1%	2%		3%	
	Company paid travel	1%	1%	2%					1%	3%			1%	
	Other	1%	1%			7%	11%		0%				1%	
	Total	Count	346	156	55	9	15	18	100	212	106	46	13	150

TRAVEL MOTIVATION - SEGMENTATION

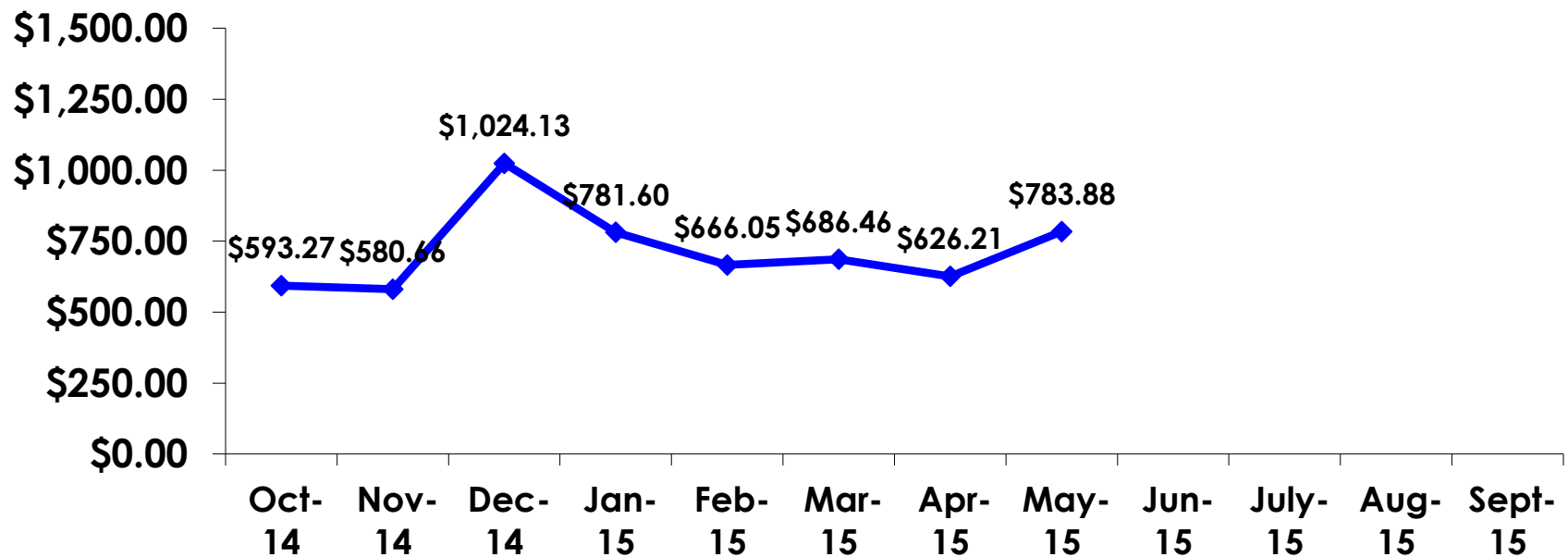
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	33%	40%	18%	33%	47%	15%	32%	30%	37%	48%	31%	76%
	Price	27%	26%	36%		7%		34%	30%	25%	17%		23%
	Visit friends/ Relatives	2%	1%	2%		7%	5%	2%	2%	1%	2%		3%
	Recomm- friend/family/trvl agnt	17%	12%	27%	11%	20%		24%	18%	17%	7%		12%
	Scuba	5%	3%	5%		7%		7%	6%	4%			5%
	Water sports	23%	20%	29%	22%	20%	5%	34%	25%	21%	22%	15%	24%
	Short travel time	54%	53%	57%	33%	27%	10%	52%	56%	52%	61%	54%	58%
	Golf	5%	3%			27%		10%	1%	7%	4%		5%
	Relax	41%	39%	45%		33%		40%	44%	36%	35%	15%	49%
	Company/ Business Trip	4%	1%	5%	44%			3%	4%	6%		8%	4%
	Company Sponsored	1%			11%			2%	0%	2%			1%
	Safe	26%	28%	36%	33%	13%		29%	24%	31%	28%	15%	32%
	Natural beauty	62%	56%	68%	33%	40%	15%	65%	68%	54%	57%	46%	61%
	Shopping	23%	23%	25%	22%	20%		22%	27%	16%	22%	8%	29%
	Career Cert/ Testing	0%	1%					1%		1%			
	Married/ Attn wedding	6%	11%	2%	22%	13%	100%	2%	6%	4%	4%	15%	3%
	Honeymoon	4%	8%	2%			10%	2%	5%	3%	2%	100%	3%
	Pleasure	49%	41%	59%	22%	40%	5%	50%	53%	42%	50%	31%	47%
	Organized sports	2%	3%	2%				1%	2%	3%	4%		2%
	Other	4%	3%	4%	11%	13%	5%	4%	1%	7%	2%		3%
	Total Count	351	156	56	9	15	20	103	216	107	46	13	152

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	84%	80%	89%	89%	67%	75%	85%	87%	82%	83%	85%	79%	
	Travel Guidebook- Bookstore	52%	54%	55%	33%	40%	65%	55%	53%	54%	52%	54%	46%	
	Prior Trip	36%	42%	27%	22%	40%	15%	34%	32%	43%	50%	31%	84%	
	Travel Agent Brochure	34%	37%	44%	22%	40%	40%	36%	36%	27%	26%	54%	26%	
	Magazine (Consumer)	32%	33%	27%	22%	20%	35%	41%	33%	31%	35%	38%	26%	
	Friend/ Relative	29%	23%	29%	22%	47%	30%	27%	33%	19%	20%	46%	19%	
	TV	11%	9%	13%				14%	13%	7%	7%	8%	9%	
	Consumer Trvl Show	3%	2%				5%	3%	4%	1%		15%	3%	
	Co-Worker/ Company Trvl Dept	2%	1%	4%	11%			2%	2%	2%			2%	
	Other	1%	1%			7%	5%	2%	1%	1%			1%	
	GVB Promo	1%	3%				5%	2%	1%	2%	4%		2%	
	GVB Office	1%						1%	1%	1%			1%	
	Travel Trade Show	1%	1%				5%	1%	0%	1%				
	Total	Count	350	156	55	9	15	20	102	215	107	46	13	151

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$718.22

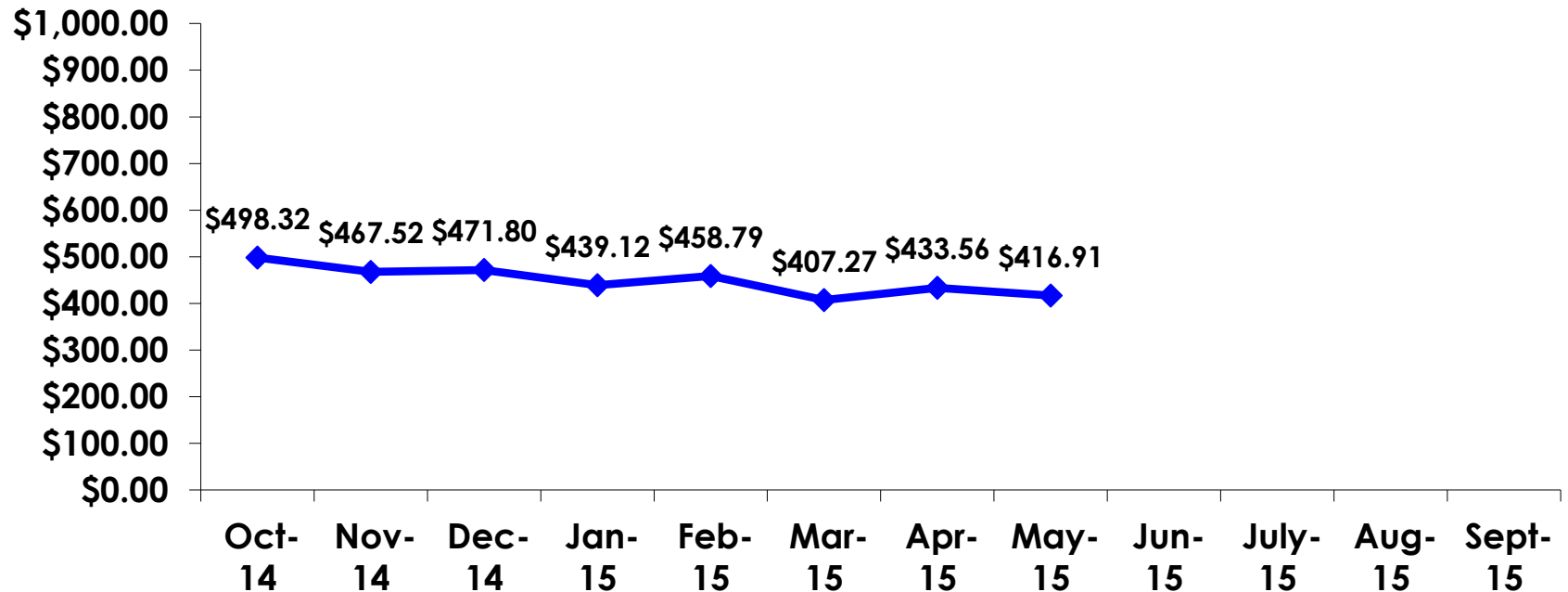
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$783.88	\$853.14	\$790.80	\$380.39	\$682.80	\$1,312.41	\$843.57	\$737.83	\$840.26	\$768.01	\$1,793.33	\$804.14
	Median	\$626	\$731	\$572	\$0	\$779	\$835	\$668	\$585	\$731	\$741	\$835	\$626
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$8,350	\$8,350	\$2,589	\$1,670	\$1,253	\$8,350	\$2,589	\$6,697	\$8,350	\$2,088	\$8,350	\$6,697

PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,449.88	\$2,105.57	\$1,114.28	\$876.75	\$1,357.24	\$3,666.71	\$1,472.85	\$1,001.12	\$2,366.25	\$3,150.93	\$3,192.22	\$1,482.96
	Median	\$1,002	\$1,420	\$752	\$877	\$1,194	\$1,921	\$1,002	\$835	\$1,754	\$2,505	\$1,712	\$1,002
AIR/ HOTEL/ MEAL	Mean	\$3,441.78	\$4,686.57	\$2,007.35	\$1,619.91	\$8,725.78	\$8,955.41	\$1,821.24	\$3,028.14	\$1,596.25	\$2,321.31	\$7,306.28	\$4,112.39
	Median	\$1,879	\$2,338	\$518	\$1,620	\$2,422	\$10,062	\$1,837	\$1,795	\$1,645	\$2,338	\$7,306	\$2,255
AIR ONLY	Mean	\$1,097.37	\$1,250.84	\$375.75	.	\$371.58	\$2,074.98	\$1,095.52	\$956.68	\$987.39	\$1,227.45	.	\$1,055.14
	Median	\$718	\$814	\$376	.	\$372	\$2,075	\$718	\$668	\$756	\$1,044	.	\$835
HOTEL ONLY	Mean	\$715.53	\$810.88	.	.	.	\$501.00	\$541.08	\$480.13	\$818.30	\$864.23	.	\$870.49
	Median	\$752	\$752	.	.	.	\$501	\$501	\$501	\$793	\$893	.	\$835
HOTEL & MEAL	Mean	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.
F&B HOTEL	Mean	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.
TRANS- JAPAN	Mean	\$74.41	\$83.82	\$47.12	\$50.10	\$50.94	\$175.35	\$74.22	\$53.14	\$112.95	\$50.10	\$45.93	\$69.62
	Median	\$42	\$42	\$33	\$50	\$46	\$58	\$84	\$42	\$50	\$50	\$46	\$42
TRANS- GUAM	Mean	\$66.80	.	.	.	.	.	\$83.50	\$66.80	.	.	.	\$50.10
	Median	\$67	.	.	.	.	.	\$84	\$67	.	.	.	\$50
OPT TOURS	Mean	\$244.21	\$407.76	\$186.58	.	\$158.86	.	\$319.65	\$214.00	\$428.70	\$1,670.01	\$334.00	\$258.85
	Median	\$167	\$276	\$167	.	\$159	.	\$188	\$167	\$167	\$1,670	\$334	\$251
OTHER	Mean	\$425.55	\$670.79	\$142.62	.	\$51.44	\$4,175.02	\$225.58	\$592.07	\$150.57	\$509.35	.	\$1,035.40
	Median	\$167	\$209	\$51	.	\$51	\$4,175	\$188	\$188	\$100	\$509	.	\$251
TOTAL	Mean	\$1,455.37	\$2,130.07	\$1,108.10	\$380.39	\$1,377.98	\$3,742.90	\$1,433.96	\$1,158.76	\$1,992.13	\$2,580.52	\$3,638.05	\$1,685.08
	Median	\$1,002	\$1,670	\$605	\$0	\$1,587	\$1,311	\$1,019	\$810	\$1,503	\$2,422	\$1,670	\$1,127

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$449.11

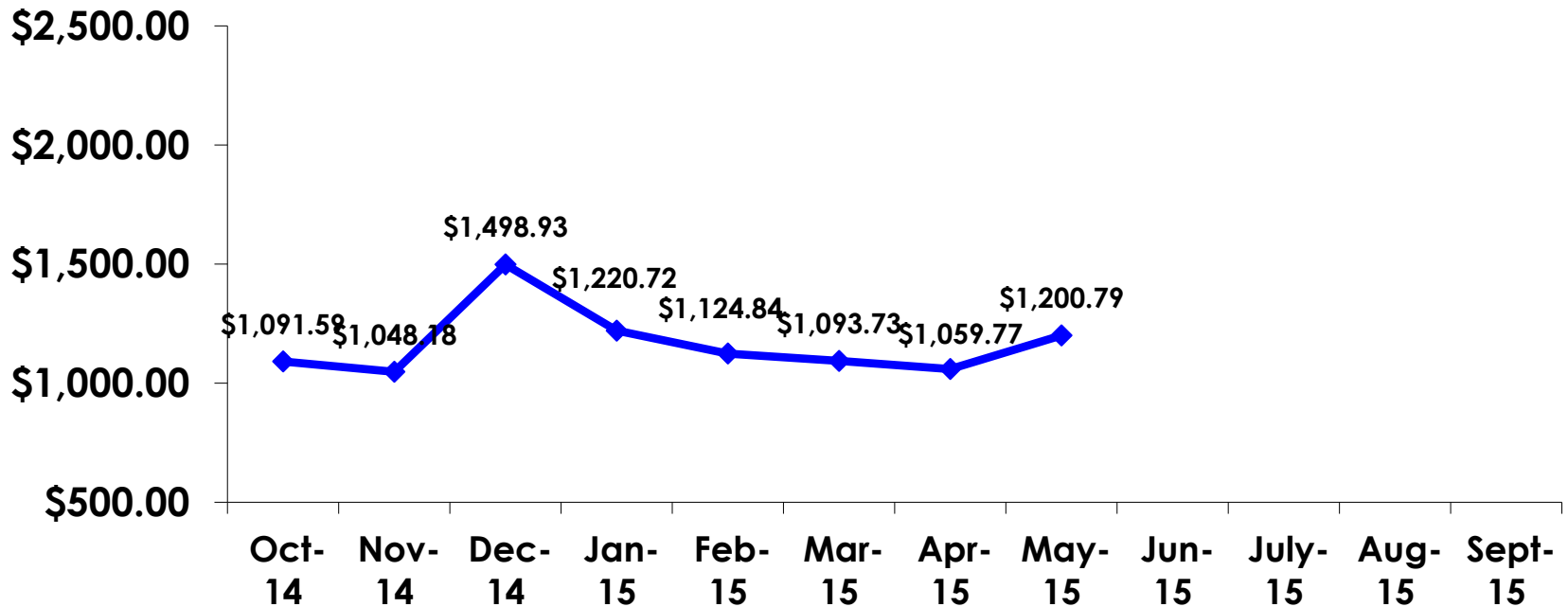
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$416.91	\$444.04	\$399.38	\$261.11	\$428.66	\$511.24	\$402.45	\$380.02	\$437.62	\$349.28	\$303.23	\$461.96
	Median	\$332	\$324	\$350	\$300	\$450	\$232	\$350	\$300	\$333	\$250	\$300	\$333
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$4,300	\$3,000	\$1,500	\$750	\$1,350	\$3,000	\$3,000	\$3,000	\$2,333	\$2,333	\$775	\$4,300

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	\$29.90	\$40.27	\$21.93	\$0.00	\$36.00	\$62.30	\$27.19	\$25.42	\$38.92	\$41.09	\$23.15	\$39.92
F&B FF/STORE	Mean	\$32.94	\$39.50	\$29.38	\$3.33	\$24.33	\$32.50	\$27.02	\$28.61	\$44.29	\$33.24	\$61.69	\$37.86
F&B RESTRNT	Mean	\$96.92	\$138.03	\$64.55	\$101.11	\$96.00	\$47.65	\$109.09	\$71.47	\$151.41	\$174.35	\$81.54	\$102.85
OPT TOUR	Mean	\$62.93	\$90.78	\$50.82	\$33.33	\$18.00	\$8.50	\$83.49	\$48.16	\$93.42	\$97.89	\$66.92	\$71.69
GIFT- SELF	Mean	\$126.22	\$168.79	\$127.77	\$84.44	\$138.67	\$39.50	\$113.26	\$104.12	\$170.81	\$106.78	\$107.92	\$159.38
GIFT- OTHER	Mean	\$92.47	\$110.93	\$123.59	\$33.33	\$91.33	\$133.00	\$100.55	\$86.54	\$102.23	\$82.63	\$111.31	\$97.10
TRANS	Mean	\$18.46	\$24.85	\$11.18	\$11.11	\$10.20	\$21.45	\$16.25	\$11.73	\$33.04	\$23.59	\$19.23	\$22.57
OTHER	Mean	\$242.55	\$390.40	\$73.57	\$88.89	\$339.67	\$844.10	\$184.50	\$173.72	\$268.92	\$428.70	\$88.08	\$318.57
TOTAL	Mean	\$705.54	\$1,009.80	\$490.57	\$355.56	\$754.20	\$1,187.50	\$670.38	\$546.85	\$919.31	\$1,027.39	\$554.92	\$851.68

TOTAL EXPENDITURES – TRACKING



YTD=\$1,167.33

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	\$1,200.79	\$1,297.18	\$1,190.18	\$641.50	\$1,111.45	\$1,823.65	\$1,246.01	\$1,117.85	\$1,277.88	\$1,117.28	\$2,096.56	\$1,266.10
	Median	\$983	\$1,085	\$1,020	\$300	\$1,113	\$997	\$1,043	\$926	\$1,085	\$991	\$1,235	\$1,015
	Minimum	\$0	\$0	\$0	\$0	\$180	\$0	\$0	\$0	\$0	\$0	\$200	\$0
	Maximum	\$10,646	\$8,700	\$2,889	\$2,420	\$1,769	\$8,700	\$4,253	\$6,960	\$8,700	\$3,392	\$8,700	\$10,646

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 2014, Jan, Feb, Mar, Apr, May 2015, and Overall Oct-2014 - May 2015

	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Combin ed Oct- 2014 - May 2015
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks		3			3	2		2	3
Ease of getting around									
Safety walking around at night									
Quality of daytime tours		5	4						6
Variety of daytime tours									
Quality of nighttime tours									
Variety of nighttime tours									
Quality of shopping	3				4	3		3	2
Variety of shopping		4		2					
Price of things on Guam									
Quality of hotel accommodations			2		5	1	4		5
Quality/cleanliness of air, sky							1	4	
Quality/cleanliness of parks		1							
Quality of landscape in Tumon	2							1	8
Quality of landscape in Guam		2	1	1	1		3		1
Quality of ground handler	1						2		7
Quality/cleanliness of transportation vehicles			3	3	2			5	4
% of Overall Satisfaction Accounted For	47.0%	52.7%	37.9%	35.6%	44.5%	33.0%	45.6%	53.5%	42.6%

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 May 2015 Period. By rank order they are:
 - **Quality of landscape in Tumon,**
 - **Quality & cleanliness of beaches & parks,**
 - **Quality of shopping,**
 - **Quality/cleanliness of air, sky, and**
 - **Quality/cleanliness of transportation vehicles**
- With all five factors the overall r^2 is .535 meaning that **53.5% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2014, Jan, Feb, Mar, Apr, May 2015 and Overall Oct-2014-May 2015									
	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Combined Oct-2014-May 2015
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks									3
Ease of getting around			1						2
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	1
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%	1.2%

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 May 2015 Period. It is:
 - **Quality of shopping.**
- With this factor, the overall r^2 is .017 meaning that **1.7% of per person on island expenditure is accounted for by this factor.**