



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013 Market Segmentation

AUGUST 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.

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

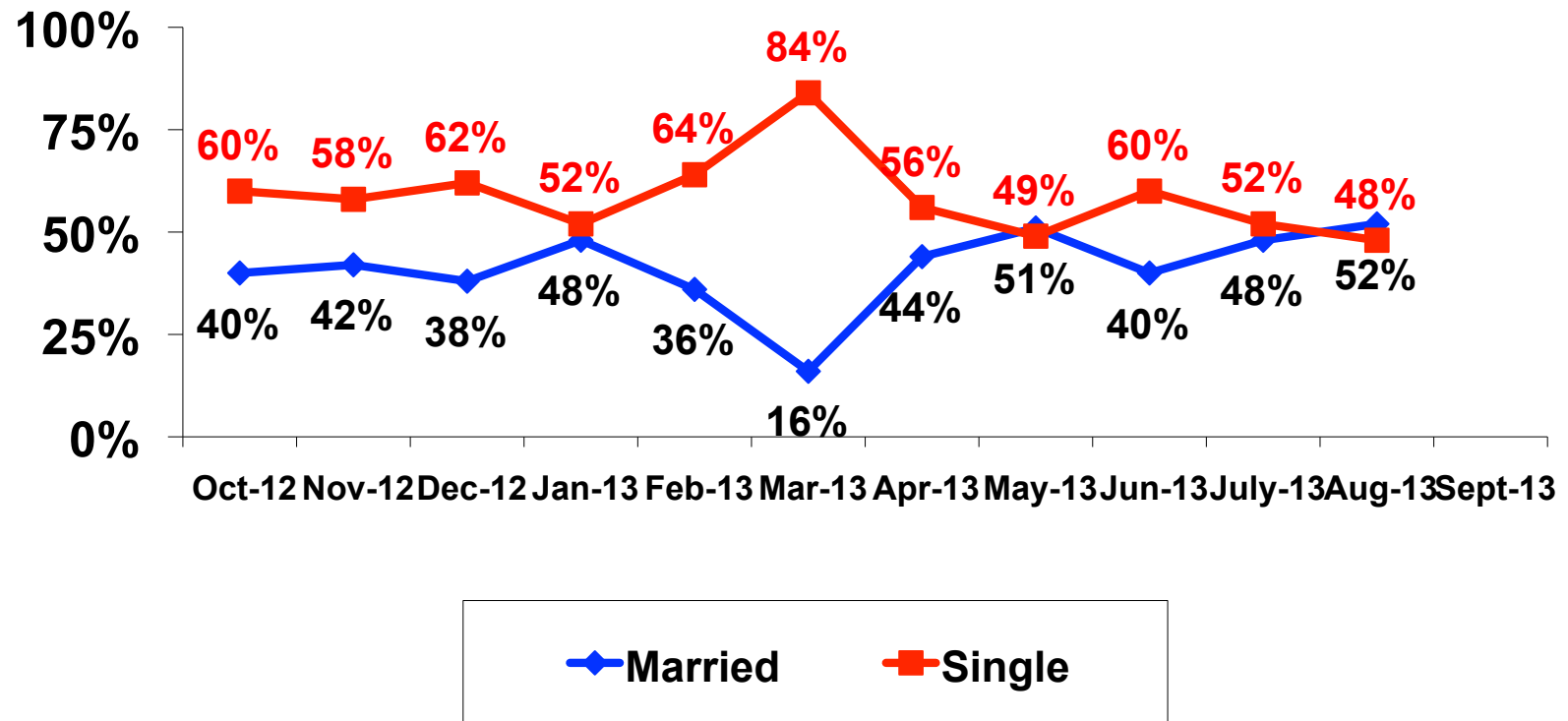
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

Highlighted Segments

	Oct 12	Nov 12	Dec 12	Jan 13	Feb 13	Mar 13	Apr 13	May 13	Jun 13	July 13	Aug 13	Sept 13
Families	39%	37%	34%	45%	34%	19%	40%	52%	37%	47%	57%	
Office Lady	15%	10%	13%	11%	9%	4%	13%	10%	10%	14%	10%	
Group	3%	3%	2%	3%	3%	9%	1%	4%	3%	3%	2%	
Silver	6%	5%	6%	3%	3%	1%	4%	7%	3%	3%	1%	
Wedding	10%	9%	7%	7%	9%	5%	6%	7%	7%	4%	2%	
Sport	37%	39%	32%	41%	43%	42%	29%	36%	37%	34%	44%	
18-35	67%	72%	69%	62%	80%	85%	62%	59%	73%	64%	56%	
36-55	23%	20%	22%	33%	17%	11%	31%	30%	22%	30%	41%	
Child	13%	9%	13%	21%	12%	6%	19%	13%	9%	17%	36%	
Honeymoon	5%	6%	6%	2%	4%	2%	3%	5%	5%	4%	1%	
Repeat	42%	37%	38%	47%	35%	24%	43%	47%	43%	44%	46%	
TOTAL	351	351	352	351	352	353	351	352	350	352	350	

SECTION 1
PROFILE OF RESPONDENTS

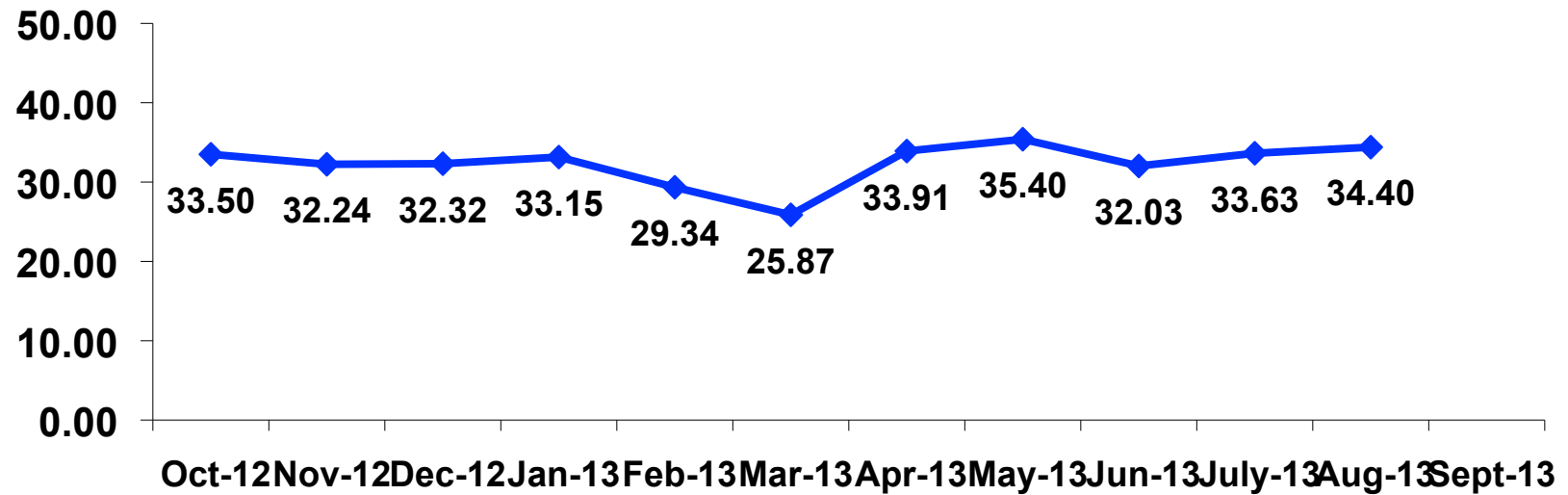
Marital Status Tracking



Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	52%	87%	23%	43%	100%	67%	44%	22%	91%	97%	100%	69%
	Single	48%	13%	77%	57%		33%	56%	78%	9%	3%		31%
	Total Count	349	197	35	7	4	6	154	195	143	125	4	159

Average Age Tracking



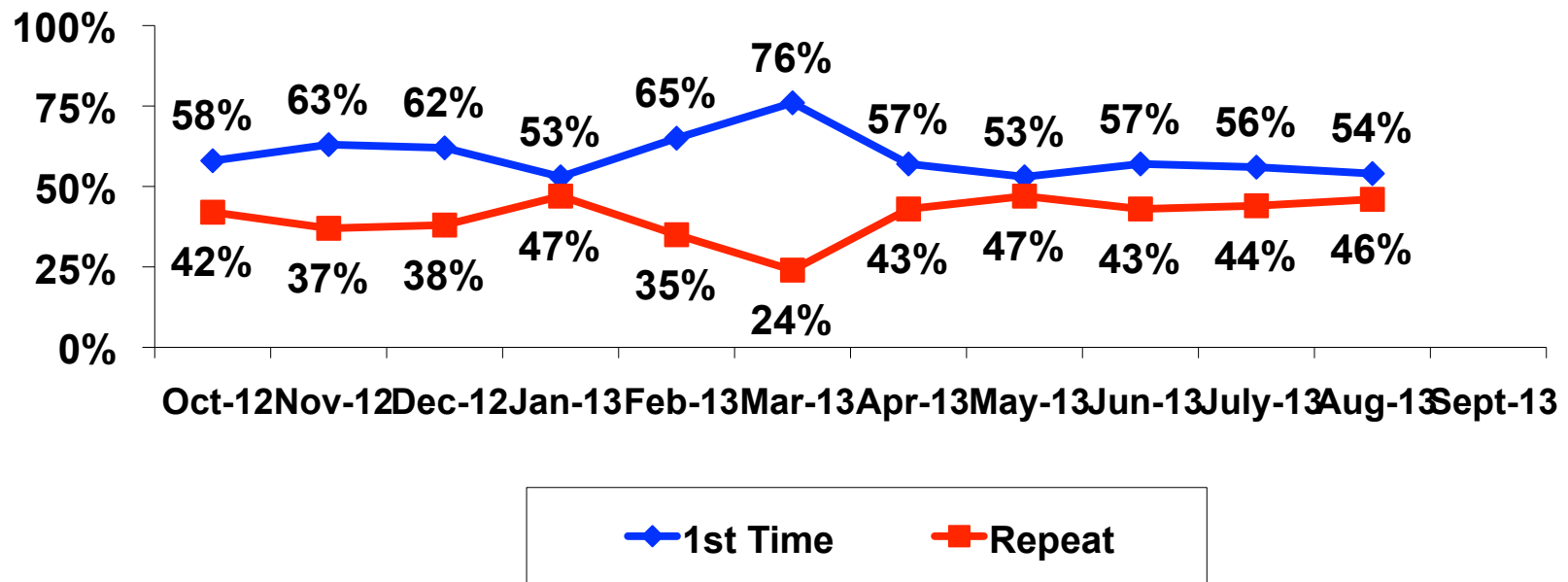
Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	19%	6%	23%	14%		17%	27%	33%		1%		6%
	25-34	36%	19%	57%	29%		50%	33%	64%		5%	100%	29%
	35-49	38%	62%	17%	57%			35%	3%	88%	85%		57%
	50+	8%	13%	3%		100%	33%	5%		13%	10%		8%
	Total Count	349	197	35	7	4	6	154	195	144	124	4	159
QF	Mean	34.40	40.39	29.46	34.71	65.75	37.17	33.09	26.22	43.64	43.13	26.75	37.96
	Median	32	41	27	36	65	28	30	26	43	43	27	40

Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q26	<Y2.0 million	2%	1%					2%	4%				1%	
	Y2.0M-Y3.0M	13%	4%	19%	20%	25%		16%	22%	2%	3%	33%	8%	
	Y3.0M-Y4.0M	12%	6%	26%				9%	17%	5%	4%		8%	
	Y4.0M-Y5.0M	14%	11%	23%	20%		50%	14%	17%	10%	7%	33%	15%	
	Y5.0M-Y7.0M	19%	24%	16%	40%	50%	25%	17%	15%	25%	20%	33%	20%	
	Y7.0M-Y10.0M	16%	24%	10%			25%	17%	9%	24%	27%		19%	
	Y10.0M+	23%	32%	6%	20%	25%		24%	13%	34%	39%		28%	
	No Income	1%						1%	2%					
	Total	Count	308	178	31	5	4	4	139	166	131	115	3	146

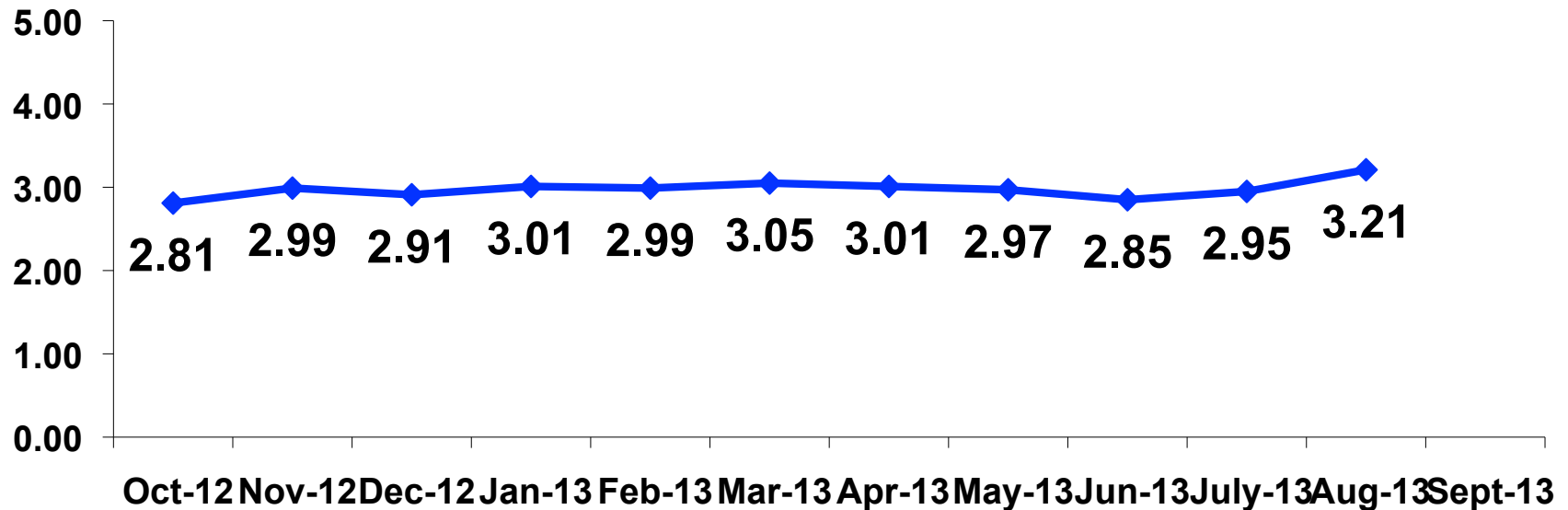
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	54%	41%	49%	57%	75%	67%	58%	70%	34%	30%	75%	
	No	46%	59%	51%	43%	25%	33%	42%	30%	66%	70%	25%	100%
	Total Count	349	197	35	7	4	6	154	195	143	124	4	160

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	3.21	3.37	3.11	2.57	3.00	3.33	3.32	3.05	3.40	3.50	3.25	3.43
	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	67%	59%	54%		50%	33%	70%	75%	57%	52%	50%	64%	
	Full package tour	23%	27%	34%			50%	22%	19%	29%	30%	50%	21%	
	Individually arranged travel (FIT)	8%	12%	9%		25%	17%	7%	4%	11%	15%		13%	
	Group tour	2%	2%	3%	100%			1%	2%	3%	2%		2%	
	Other	0%	1%			25%					1%			
	Total	Count	349	197	35	7	4	6	153	195	143	124	4	159

Travel Motivation Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	39%	51%	37%	14%		33%	36%	25%	59%	61%	25%	86%	
	Price	29%	26%	23%				36%	30%	31%	23%		28%	
	Visit friends/ Relatives	2%	2%	3%				3%	3%	2%	2%		3%	
	Recomm- friend/family/trvl agnt	19%	13%	17%		25%	33%	18%	26%	9%	11%	50%	12%	
	Scuba	10%	5%	6%	29%			17%	12%	6%	3%		4%	
	Water sports	30%	24%	31%	14%		17%	43%	33%	28%	27%	25%	26%	
	Short travel time	60%	68%	49%	71%	50%	33%	62%	52%	71%	74%	25%	69%	
	Golf	2%	3%					3%	1%	3%	2%		3%	
	Relax	36%	31%	37%	14%	25%	17%	41%	39%	33%	26%	25%	33%	
	Company/ Business Trip	2%	1%	3%				3%	2%	1%	1%		2%	
	Company Sponsored	1%	1%	6%	14%			1%	1%	1%	1%		1%	
	Safe	23%	27%	11%			17%	21%	17%	31%	30%		27%	
	Natural beauty	69%	67%	63%	57%	50%	50%	74%	70%	71%	67%	50%	67%	
	Shopping	37%	30%	46%	14%		33%	37%	44%	30%	27%	25%	39%	
	Career Cert/ Testing	0%							1%				1%	
	Married/ Attn wedding	2%	3%	6%			100%		2%			75%	1%	
	Honeymoon	1%	2%	3%			50%		2%			100%	1%	
	Pleasure	61%	59%	49%	57%		17%	68%	62%	64%	59%	50%	58%	
	Organized sports	3%	2%					4%	3%	3%	2%		3%	
	Other	2%	3%	3%		25%		3%	2%	2%	3%		1%	
	Total	Count	347	197	35	7	4	6	152	193	143	125	4	160

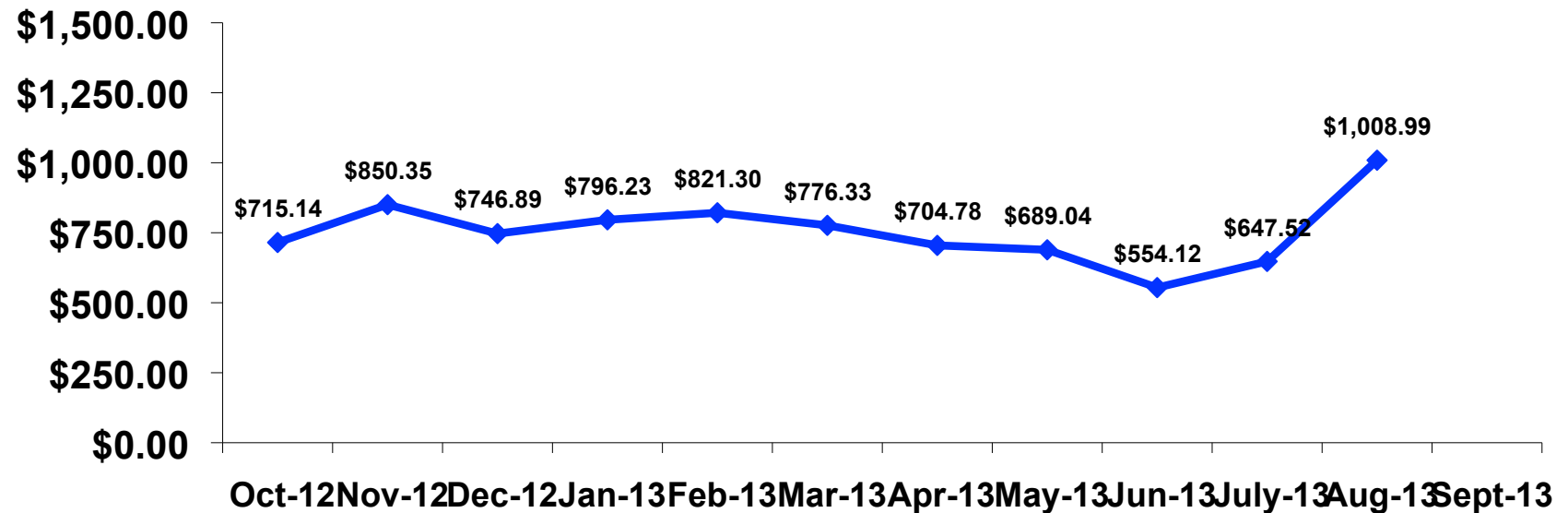
Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	83%	83%	71%	86%	50%	33%	84%	84%	85%	85%	50%	86%	
	Travel Guidebook- Bookstore	59%	58%	46%	57%	25%	67%	62%	59%	62%	53%	75%	55%	
	Travel Agent Brochure	45%	47%	43%	29%	50%	50%	51%	43%	47%	46%	25%	42%	
	Magazine (Consumer)	40%	37%	43%	71%		33%	46%	47%	35%	35%	25%	39%	
	Prior Trip	40%	51%	43%	14%		33%	34%	27%	57%	61%	25%	87%	
	Friend/ Relative	32%	26%	11%	29%	75%	33%	36%	38%	22%	23%	50%	19%	
	TV	6%	6%	3%			17%	5%	6%	7%	7%	25%	8%	
	Co-Worker/ Company Trvl Dept	3%	3%	3%				3%	2%	4%	3%		4%	
	Consumer Trvl Show	2%	1%					3%	3%	1%	1%		1%	
	Other	1%	1%					1%	1%	1%	2%		1%	
	GVB Promo	1%	2%					1%		2%	2%		1%	
	Newspaper	1%	2%					2%		2%	2%		1%	
	Radio	1%	1%						1%	1%	1%	25%	1%	
	GVB Office	1%	1%					1%	1%	1%	1%			
	Total	Count	349	197	35	7	4	6	154	195	143	124	4	160

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

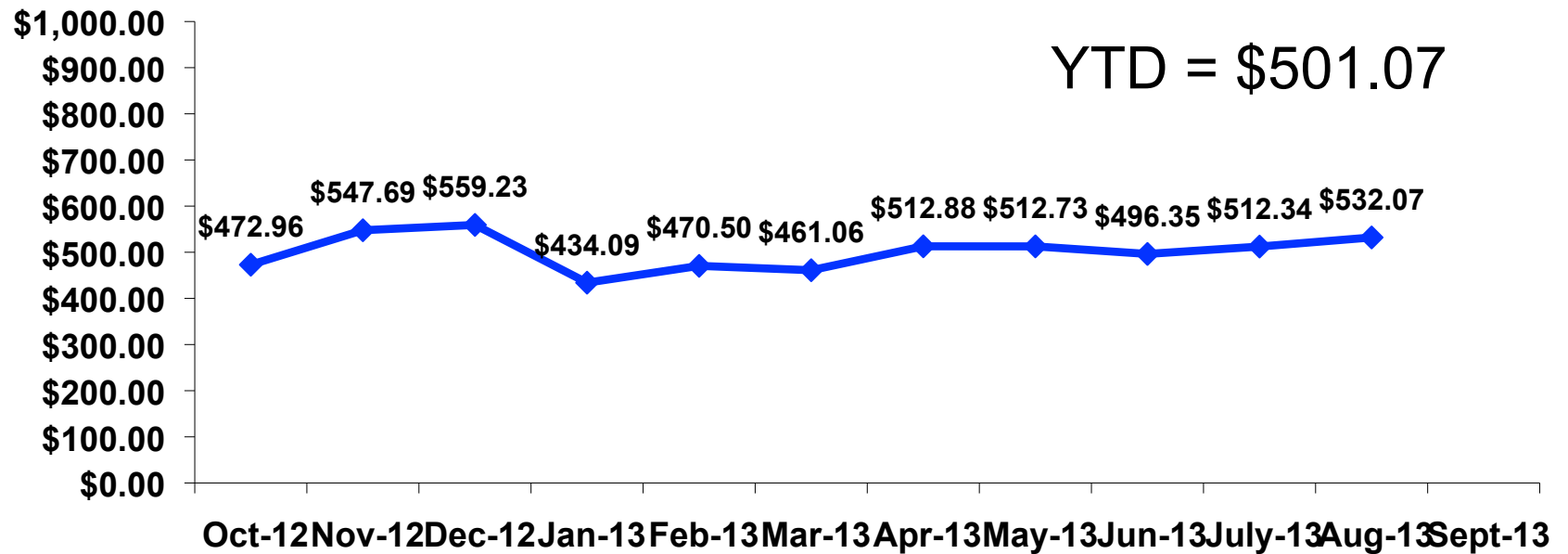
YTD=\$755.47



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	\$1,008.99	\$1,013.66	\$1,094.48	\$1,104.87	\$968.04	\$1,152.43	\$1,076.75	\$1,024.49	\$992.38	\$1,026.96	\$1,728.64	\$973.46
	Median	\$1,024	\$1,024	\$1,086	\$1,024	\$912	\$1,152	\$1,024	\$942	\$1,024	\$1,024	\$1,665	\$1,024
	Minimum	\$0	\$0	\$0	\$410	\$0	\$0	\$0	\$0	\$0	\$0	\$1,024	\$0
	Maximum	\$8,093	\$2,561	\$2,561	\$1,793	\$2,049	\$2,561	\$8,093	\$8,093	\$2,049	\$2,083	\$2,561	\$2,083

On-Island Expenditures Tracking



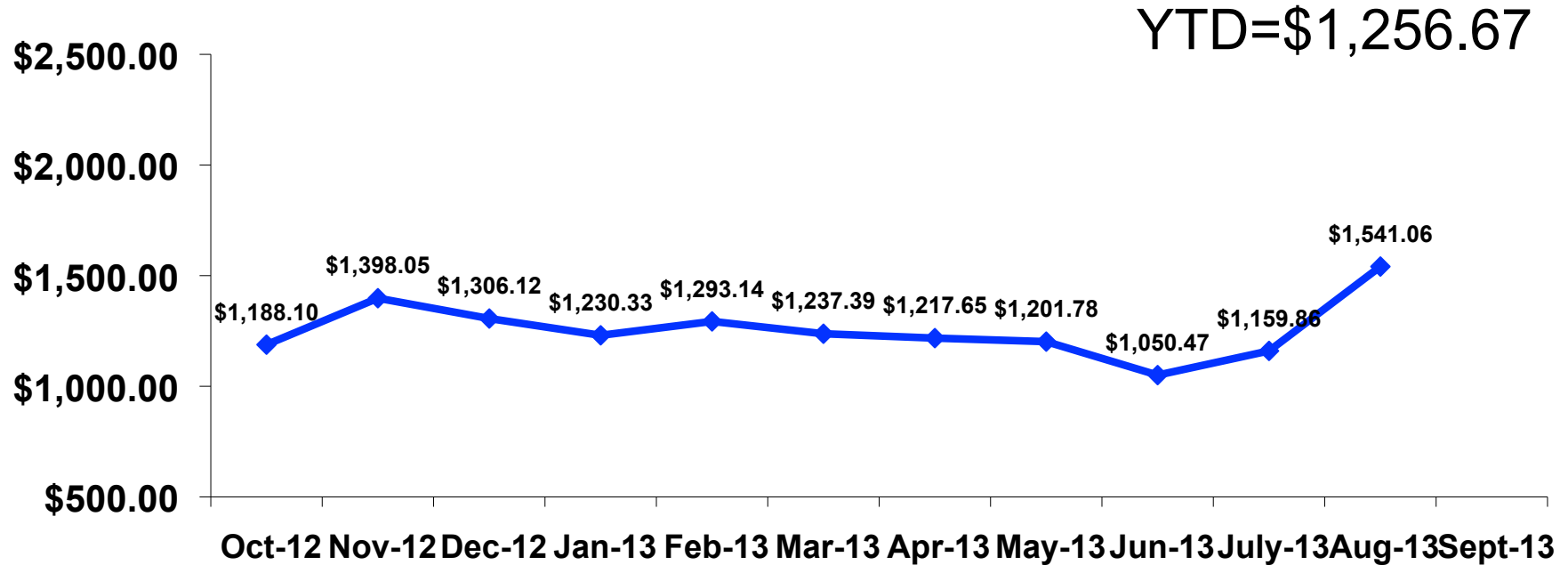
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$532.07	\$404.10	\$472.82	\$340.00	\$370.83	\$188.89	\$650.19	\$620.65	\$416.01	\$381.11	\$295.83	\$481.23
	Median	\$375	\$300	\$300	\$200	\$425	\$200	\$445	\$450	\$300	\$299	\$267	\$336
	Minimum	\$0	\$0	\$0	\$0	\$133	\$50	\$0	\$0	\$0	\$0	\$50	\$0
	Maximum	\$5,000	\$3,982	\$2,333	\$1,000	\$500	\$333	\$5,000	\$5,000	\$3,333	\$3,333	\$600	\$3,333

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	\$57.44	\$78.23	\$25.57	\$1.43	\$117.50	\$36.67	\$66.06	\$34.91	\$75.88	\$92.24	\$75.00	\$71.10
	Median	\$0	\$0	\$0	\$0	\$135	\$0	\$0	\$0	\$0	\$0	\$50	\$0
F&B FF/STORE	Mean	\$41.24	\$52.56	\$15.06	\$2.86	\$57.50	\$20.83	\$52.44	\$34.62	\$50.80	\$56.36	\$50.00	\$48.96
	Median	\$10	\$20	\$0	\$0	\$55	\$3	\$20	\$5	\$20	\$20	\$50	\$20
F&B RESTRNT	Mean	\$117.01	\$155.10	\$46.23	\$14.29	\$150.00	\$51.67	\$127.20	\$85.25	\$161.26	\$193.10	\$100.00	\$146.11
	Median	\$50	\$99	\$0	\$0	\$50	\$0	\$60	\$20	\$100	\$150	\$50	\$100
OPT TOUR	Mean	\$108.04	\$107.80	\$46.49	\$0.00	\$27.50	\$16.67	\$159.92	\$101.00	\$123.81	\$118.54	\$50.00	\$106.92
	Median	\$0	\$0	\$0	\$0	\$5	\$0	\$100	\$0	\$0	\$0	\$50	\$0
GIFT- SELF	Mean	\$221.29	\$236.95	\$164.00	\$8.57	\$125.00	\$18.33	\$273.42	\$177.14	\$277.08	\$263.98	\$25.00	\$278.03
	Median	\$50	\$100	\$0	\$0	\$100	\$0	\$80	\$30	\$100	\$100	\$0	\$100
GIFT- OTHER	Mean	\$143.32	\$148.05	\$89.43	\$0.00	\$45.00	\$80.00	\$184.99	\$143.88	\$144.55	\$140.68	\$100.00	\$125.72
	Median	\$55	\$100	\$50	\$0	\$40	\$5	\$67	\$50	\$100	\$100	\$50	\$74
TRANS	Mean	\$19.98	\$26.03	\$14.06	\$1.43	\$45.00	\$0.83	\$17.97	\$12.91	\$29.49	\$32.46	\$0.00	\$23.77
	Median	\$0	\$0	\$0	\$0	\$10	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$275.61	\$323.12	\$420.11	\$477.14	\$607.50	\$516.67	\$264.97	\$202.32	\$349.18	\$381.77	\$525.00	\$263.95
	Median	\$0	\$0	\$0	\$200	\$280	\$50	\$0	\$0	\$0	\$0	\$50	\$0
TOTAL	Mean	\$981.73	\$1,119.65	\$820.94	\$505.71	\$1,175.00	\$741.67	\$1,150.54	\$796.37	\$1,208.29	\$1,274.81	\$925.00	\$1,057.86
	Median	\$700	\$990	\$500	\$200	\$1,100	\$650	\$750	\$600	\$1,000	\$1,000	\$800	\$900

Total Expenditures Tracking



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	\$1,541.06	\$1,417.76	\$1,567.30	\$1,444.87	\$1,338.87	\$1,341.32	\$1,726.94	\$1,645.14	\$1,408.38	\$1,408.08	\$2,024.48	\$1,454.69
	Median	\$1,480	\$1,416	\$1,479	\$1,524	\$1,412	\$1,419	\$1,526	\$1,524	\$1,381	\$1,399	\$1,862	\$1,408
	Minimum	\$0	\$0	\$50	\$450	\$350	\$50	\$0	\$0	\$0	\$0	\$1,614	\$0
	Maximum	\$8,493	\$5,314	\$4,006	\$2,024	\$2,182	\$2,761	\$8,493	\$8,493	\$4,187	\$4,187	\$2,761	\$4,187

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 2012, Jan, Feb, Mar, Apr, May, Jun, Jul, Aug 2013, and Overall Oct-2012 - Aug 2013

	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Combined Oct-2012 - Aug 2013
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	5	3					1			5		5
Ease of getting around	3				3		5					9
Safety walking around at night			4							6		
Quality of daytime tours								3		4		6
Variety of daytime tours					4							
Quality of nighttime tours												
Variety of nighttime tours										7		
Quality of shopping	4	4			1	2						3
Variety of shopping			5	3								
Price of things on Guam			2						2			
Quality of hotel accommodations		2		2		3	4		4	3	3	2
Quality/cleanliness of air, sky												
Quality/cleanliness of parks												10
Quality of landscape in Tumon			1							1	1	7
Quality of landscape in Guam	1	1		1	2	1	3	1	3			1
Quality of ground handler			3			4					2	8
Quality/cleanliness of transportation vehicles	2				5		2	2	1	2		4
% of Per Person On Island Expenditures Accounted For	54.7%	50.6%	45.2%	42.4%	41.5%	40.1%	46.3%	38.8%	38.0%	49.6%	35.2%	43.7%

NOTE: Only significant drivers are included.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by three significant factors in the August 2013 Period. By rank order they are:
 - **Quality of landscape in Tumon,**
 - **Quality of ground handler, and**
 - **Quality of hotel accommodations.**
- With all three factors the overall r^2 is .352 meaning that **35.2% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2012, Jan, Feb, Mar, Apr, May, Jun, Jul, Aug 2013 and Overall Oct-2012-Aug 2013

	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Combined Oct-2012-Aug 2013
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks								3				
Ease of getting around			1									
Safety walking around at night												
Quality of daytime tours												
Variety of daytime tours				1								
Quality of nighttime tours				2								
Variety of nighttime tours				3								2
Quality of shopping			3	4								1
Variety of shopping												
Price of things on Guam							1					
Quality of hotel accommodations											1	
Quality/cleanliness of air, sky												
Quality/cleanliness of parks												3
Quality of landscape in Tumon												
Quality of landscape in Guam								2		1		
Quality of ground handler			2					1				
Quality/cleanliness of transportation vehicles												
% of Per Person On Island Expenditures Accounted For	0.0%	0.0%	4.8%	16.2%	0.0%	0.0%	1.7%	6.7%	0.0%	2.3%	2.7%	1.5%

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 Aug 2013 Period. That factor is:
 - **Quality of hotel accommodations.**
- With that factor the overall r^2 is .027 meaning that **2.7% of overall satisfaction is accounted for by this factor.**