



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013 Market Segmentation

DECEMBER 2012



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

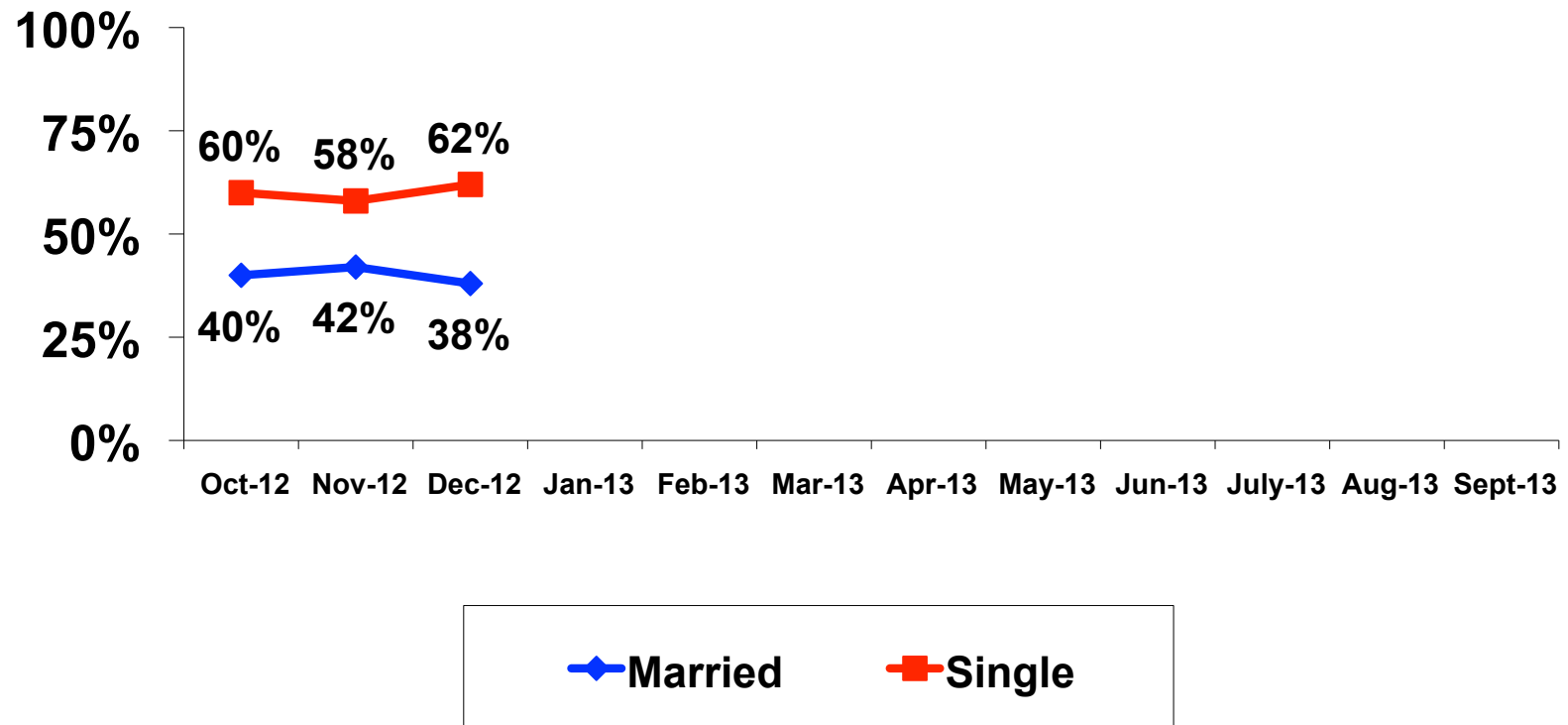
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

Highlighted Segments

	Oct 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%									
Office Lady	15%	10%	13%									
Group	3%	3%	2%									
Silver	6%	5%	6%									
Wedding	10%	9%	7%									
Sport	37%	39%	32%									
18-35	67%	72%	69%									
36-55	23%	20%	22%									
Child	13%	9%	13%									
Honeymoon	5%	6%	6%									
Repeat	42%	37%	38%									
TOTAL	351	351	352									

SECTION 1
PROFILE OF RESPONDENTS

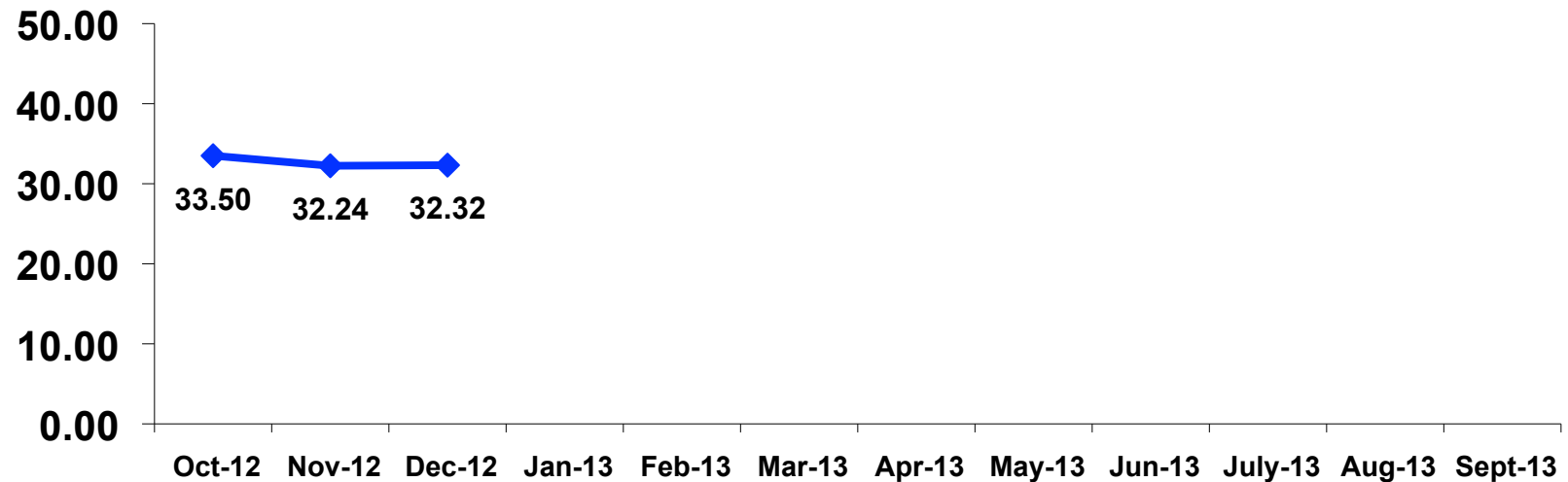
Marital Status Tracking



Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	38%	81%	16%		100%	54%	33%	19%	78%	81%	95%	49%
	Single	62%	19%	84%	100%		46%	67%	81%	22%	19%	5%	51%
	Total Count	349	119	44	6	20	24	111	243	77	43	21	130

Average Age Tracking



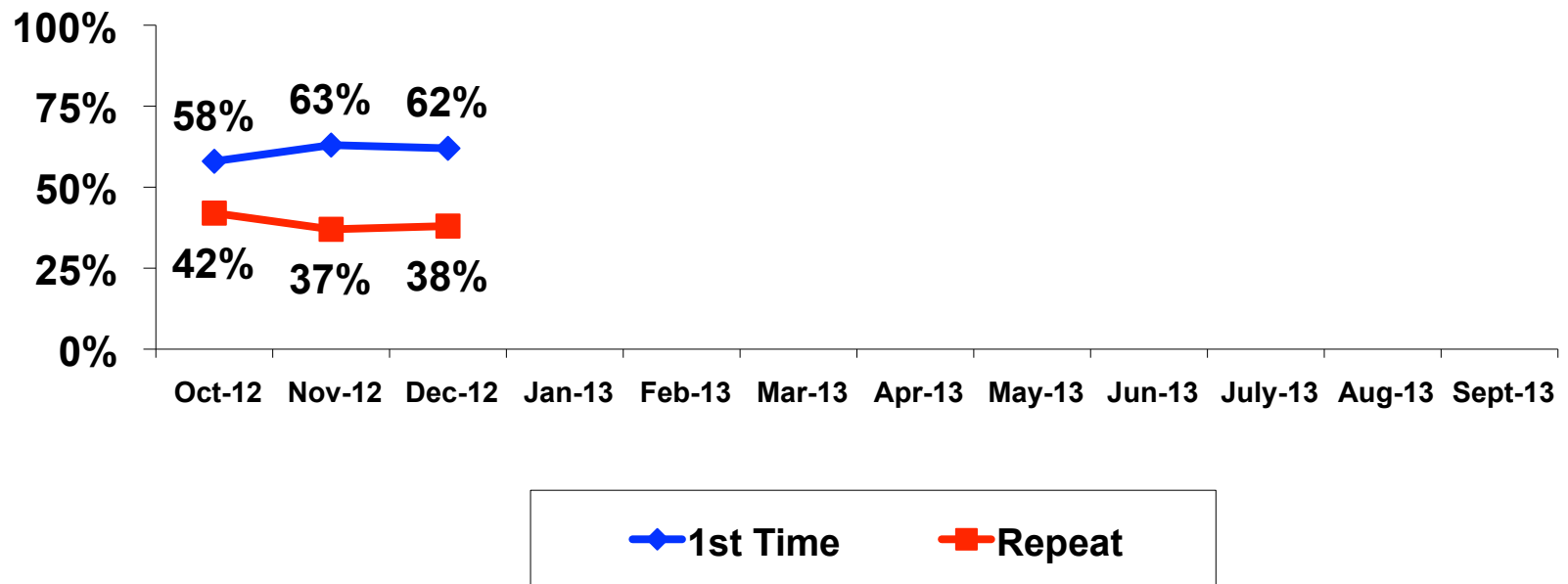
Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	31%	6%	16%	67%		13%	35%	44%				16%
	25-34	37%	33%	60%	33%		63%	41%	53%		23%	71%	32%
	35-49	22%	42%	21%			13%	15%	3%	90%	64%	29%	38%
	50+	10%	19%	2%		100%	13%	8%		10%	14%		14%
	Total Count	346	118	43	6	20	24	111	243	78	44	21	130
QF	Mean	32.32	39.69	30.63	24.83	65.45	33.21	30.61	25.69	42.87	41.75	32.76	36.92
	Median	28	39	28	23	64	30	27	25	42	41	33	35

Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	8%	3%	7%	25%			7%	11%	1%	3%		5%
	Y2.0M-Y3.0M	11%	5%	27%	25%	11%	9%	8%	12%	10%	10%		12%
	Y3.0M-Y4.0M	20%	15%	24%	25%	44%	27%	23%	22%	10%	8%	17%	18%
	Y4.0M-Y5.0M	17%	20%	22%	25%	17%	32%	20%	19%	14%	10%	44%	15%
	Y5.0M-Y7.0M	18%	22%	7%		11%	9%	18%	15%	28%	31%	22%	21%
	Y7.0M-Y10.0M	13%	25%	2%		11%	9%	11%	9%	25%	33%	6%	14%
	Y10.0M+	11%	10%	10%		6%	14%	10%	11%	11%	5%	11%	13%
	No Income	2%	1%					3%	2%				3%
	Total Count	303	106	41	4	18	22	97	208	71	39	18	120

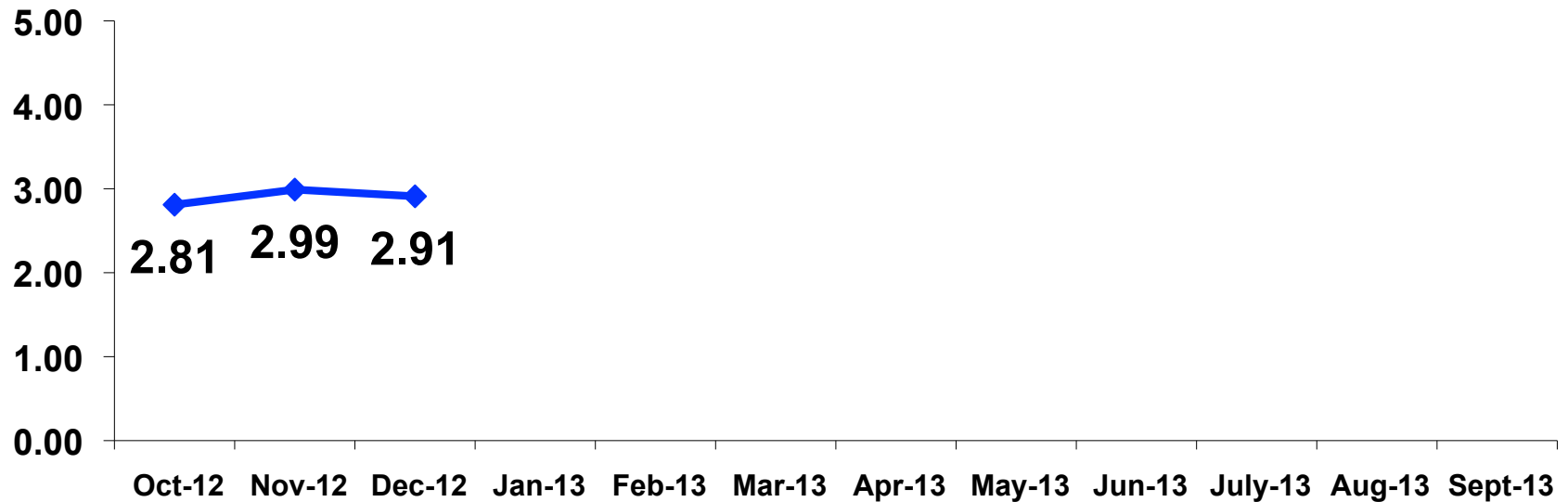
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	62%	50%	51%	50%	50%	84%	66%	72%	36%	42%	81%	
	No	38%	50%	49%	50%	50%	16%	34%	28%	64%	58%	19%	100%
	Total Count	348	119	43	6	20	25	111	241	76	43	21	131

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	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q8	Mean	2.91	3.16	2.80	3.00	3.15	3.36	3.04	2.87	2.97	3.25	3.43	2.96
	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	68%	60%	77%		70%	44%	71%	65%	77%	70%	43%	75%	
	Full package tour	22%	34%	16%		15%	40%	22%	25%	18%	23%	57%	18%	
	Individually arranged travel (FIT)	5%	5%	2%		15%	12%	4%	4%	3%	7%		5%	
	Group tour	2%		2%	100%			2%	2%				2%	
	Other	1%	1%	2%			4%	2%	1%	3%			1%	
	Company paid travel	1%							2%					
	Total	Count	352	120	44	6	20	25	112	243	78	44	21	131

Travel Motivation Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	28%	41%	39%	17%	30%	4%	29%	20%	53%	52%	14%	74%
	Price	28%	27%	23%		25%		29%	30%	22%	30%	5%	27%
	Visit friends/ Relatives	3%	3%	7%		5%	4%	3%	3%	1%	2%		5%
	Reconnun- friend/family/trvl agnt	25%	13%	25%	50%	30%	4%	31%	27%	18%	18%		12%
	Scuba	7%	4%	11%	17%			13%	8%	4%	2%	5%	9%
	Water sports	25%	22%	27%	17%	15%		45%	26%	24%	25%	10%	23%
	Short travel time	47%	50%	55%		65%	4%	54%	44%	51%	52%	33%	54%
	Golf	3%	3%			10%		6%	1%	5%			8%
	Relax	35%	37%	34%		35%	4%	34%	33%	40%	43%	14%	43%
	Company/ Business Trip	4%	1%		33%			3%	5%	3%	2%		2%
	Company Sponsored	1%	1%		17%			2%	1%	1%	2%		
	Safe	17%	24%	18%	17%	25%		16%	14%	26%	25%	10%	24%
	Natural beauty	58%	56%	59%	17%	50%	16%	62%	61%	55%	66%	43%	62%
	Shopping	39%	32%	43%		5%	4%	33%	43%	38%	36%	19%	41%
	Career Cert/ Testing	0%							0%				1%
	Married/ Attn wedding	7%	15%	11%		10%	100%	7%	7%	5%	11%	33%	3%
	Honeymoon	6%	18%				28%	8%	7%	6%	7%	100%	3%
	Pleasure	50%	40%	45%		45%	8%	54%	53%	44%	50%	24%	49%
	Organized sports	3%	3%	2%			4%	6%	3%	4%	2%	5%	3%
	Other	4%	1%	2%		10%		3%	2%	6%			2%
	Total Count	351	120	44	6	20	25	112	242	78	44	21	131

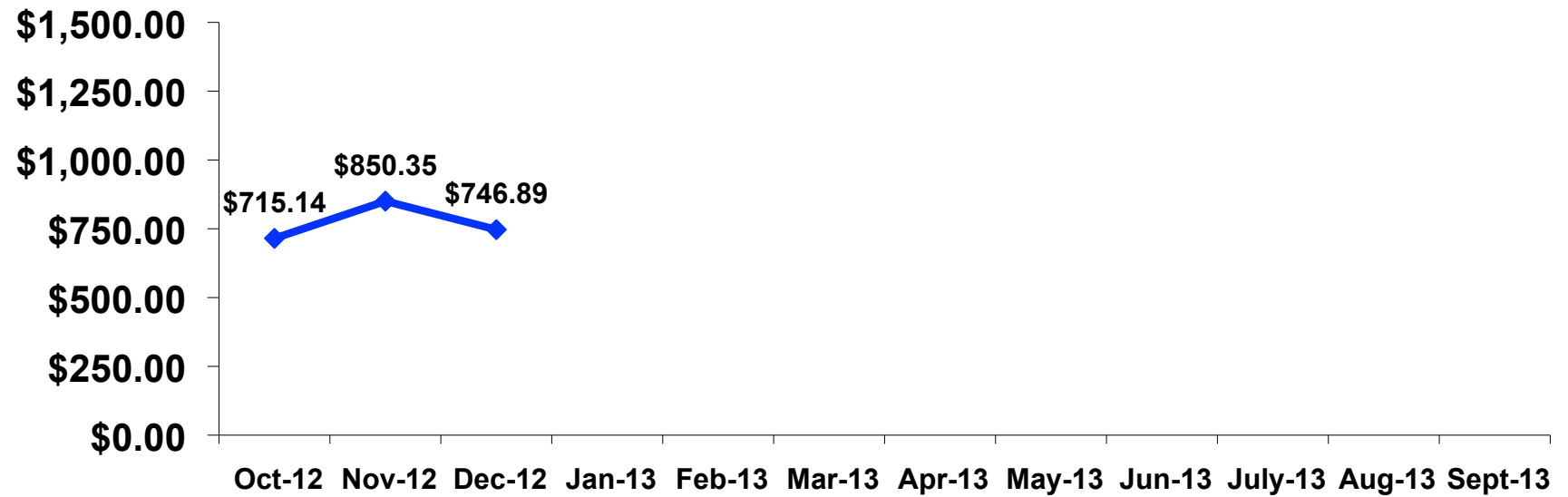
Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	74%	76%	84%	50%	40%	72%	69%	77%	76%	82%	81%	73%	
	Travel Guidebook- Bookstore	53%	51%	48%	17%	40%	44%	48%	54%	51%	45%	67%	48%	
	Travel Agent Brochure	48%	50%	55%	17%	40%	52%	46%	51%	42%	34%	81%	37%	
	Magazine (Consumer)	37%	35%	27%	17%	20%	40%	41%	44%	21%	32%	48%	29%	
	Friend/ Relative	35%	23%	27%	17%	30%	36%	35%	41%	22%	25%	14%	24%	
	Prior Trip	32%	43%	41%	50%	45%	12%	29%	22%	58%	55%	19%	85%	
	TV	10%	13%	7%			8%	7%	11%	11%	16%	14%	10%	
	Co-Worker/ Company Trvl Dept	5%	5%	5%	17%		4%	4%	6%	3%	2%	10%	4%	
	Consumer Trvl Show	3%	3%		17%	10%		5%	2%	1%	2%		4%	
	GVB Promo	1%	1%	7%				2%	2%	1%	2%		2%	
	Newspaper	1%	3%			5%			1%	1%	7%		2%	
	Other	1%						1%	0%	1%			1%	
	Theater Ad	0%						1%	0%					
	Radio	0%	1%						0%					
	GVB Office	0%		2%			4%		0%					
	Total	Count	350	120	44	6	20	25	112	243	76	44	21	131

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

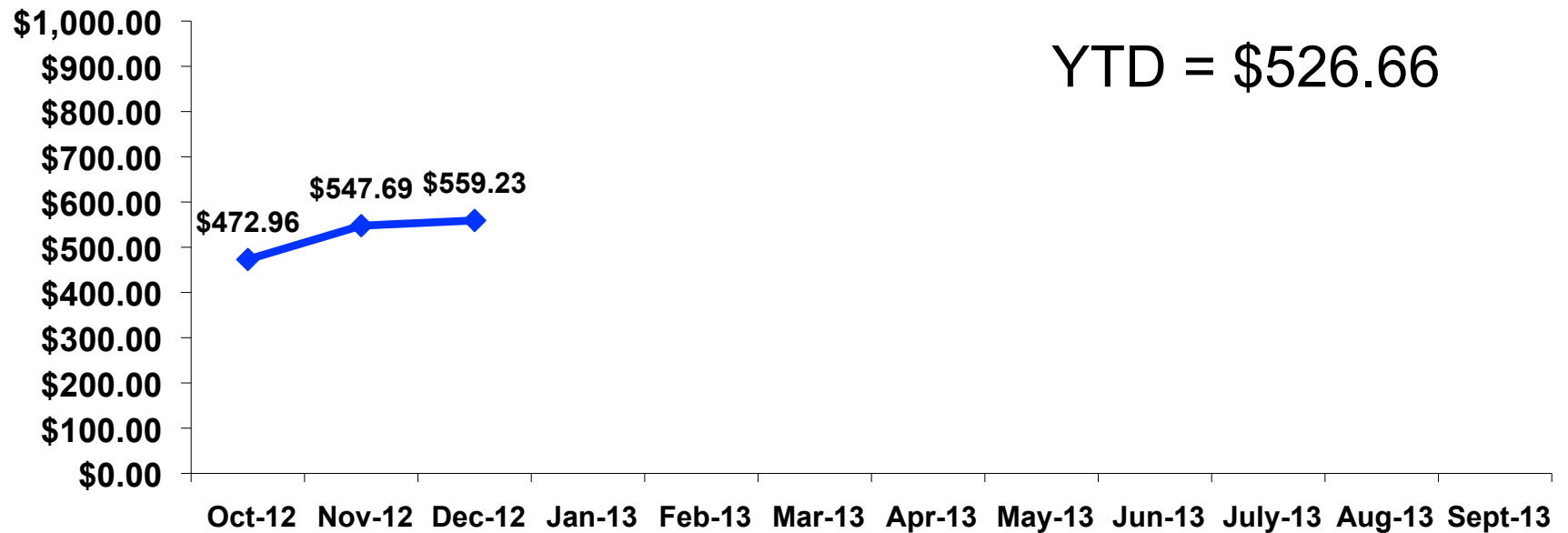
YTD=\$770.77



Prepaid 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	\$746.89	\$944.93	\$792.20	\$498.14	\$856.20	\$954.27	\$790.03	\$725.40	\$794.73	\$863.17	\$1,475.65	\$770.75
	Median	\$713	\$800	\$720	\$594	\$840	\$800	\$720	\$660	\$675	\$736	\$1,440	\$720
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,201	\$3,201	\$2,401	\$720	\$1,620	\$3,201	\$2,401	\$3,201	\$2,401	\$2,161	\$3,201	\$3,201

On-Island Expenditures Tracking



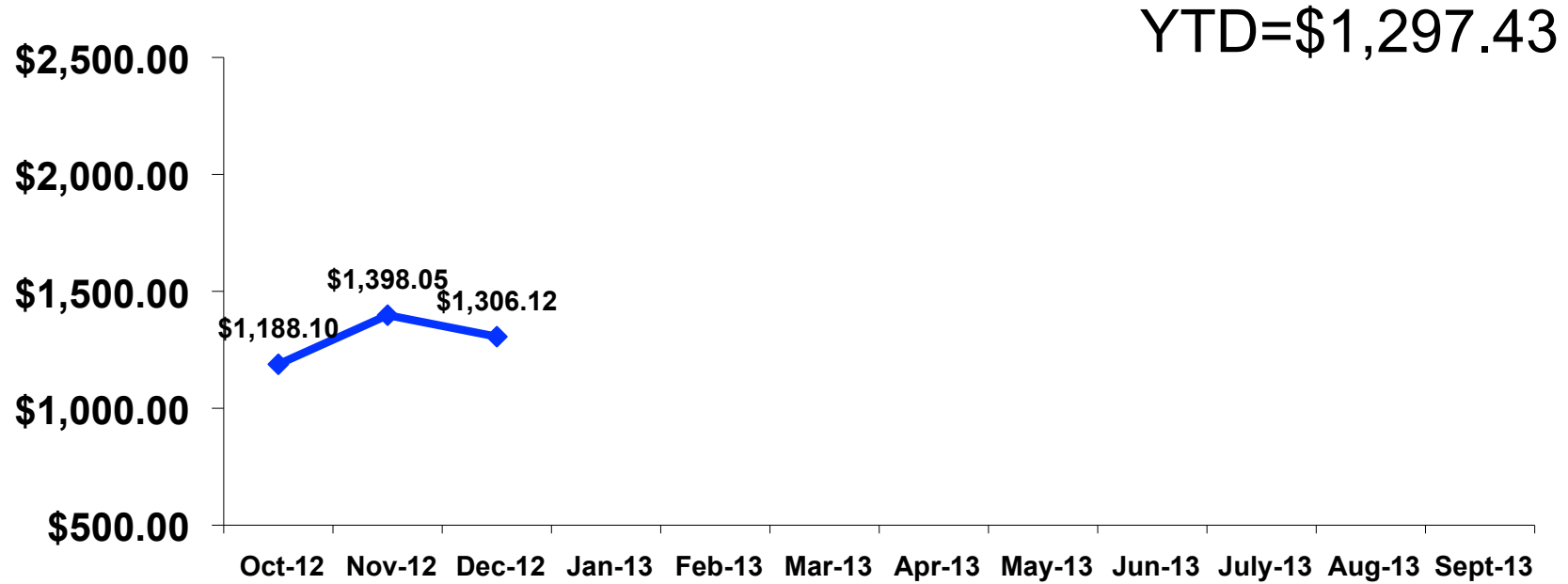
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$559.23	\$515.18	\$629.48	\$519.33	\$353.17	\$516.03	\$585.01	\$549.08	\$600.52	\$498.07	\$507.25	\$662.90
	Median	\$400	\$333	\$500	\$500	\$325	\$300	\$400	\$400	\$417	\$333	\$300	\$450
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$6,000	\$4,000	\$2,000	\$1,058	\$800	\$3,000	\$4,000	\$6,000	\$3,610	\$2,500	\$3,000	\$6,000

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	\$26.30	\$51.12	\$13.55	\$16.67	\$25.80	\$30.96	\$30.58	\$14.39	\$57.65	\$55.45	\$40.00	\$28.69
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$30.09	\$36.67	\$16.39	\$33.33	\$23.80	\$49.32	\$26.30	\$28.21	\$40.79	\$46.14	\$49.52	\$29.34
	Median	\$7	\$5	\$0	\$40	\$0	\$0	\$9	\$6	\$30	\$30	\$5	\$0
F&B RESTRNT	Mean	\$71.40	\$115.43	\$38.11	\$58.33	\$62.25	\$133.60	\$76.77	\$54.95	\$129.39	\$213.07	\$159.05	\$84.38
	Median	\$10	\$15	\$0	\$75	\$0	\$0	\$6	\$0	\$50	\$100	\$10	\$0
OPT TOUR	Mean	\$90.93	\$131.28	\$70.80	\$60.33	\$91.25	\$60.60	\$132.27	\$66.81	\$170.90	\$201.68	\$166.48	\$109.83
	Median	\$0	\$0	\$0	\$77	\$0	\$0	\$80	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$253.01	\$335.05	\$176.14	\$159.17	\$139.80	\$566.60	\$230.55	\$269.72	\$241.95	\$382.05	\$608.81	\$325.27
	Median	\$46	\$35	\$0	\$75	\$0	\$0	\$20	\$40	\$100	\$100	\$0	\$50
GIFT- OTHER	Mean	\$122.52	\$160.63	\$67.16	\$41.67	\$57.55	\$144.20	\$118.40	\$110.58	\$174.47	\$155.23	\$209.52	\$145.39
	Median	\$50	\$77	\$0	\$25	\$0	\$0	\$50	\$50	\$100	\$100	\$70	\$50
TRANS	Mean	\$12.29	\$14.29	\$29.43	\$25.00	\$9.60	\$7.40	\$17.54	\$11.10	\$18.19	\$23.64	\$7.86	\$15.62
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$224.70	\$366.67	\$257.77	\$124.83	\$160.70	\$357.48	\$219.95	\$186.41	\$312.52	\$470.11	\$281.19	\$315.02
	Median	\$0	\$0	\$35	\$100	\$0	\$10	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$831.31	\$1,205.96	\$669.34	\$519.33	\$570.75	\$1,349.76	\$860.76	\$752.02	\$1,111.42	\$1,510.55	\$1,570.05	\$1,041.39
	Median	\$500	\$800	\$500	\$500	\$500	\$500	\$500	\$476	\$900	\$1,000	\$600	\$665

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	\$1,306.12	\$1,460.11	\$1,421.69	\$1,017.47	\$1,209.37	\$1,470.29	\$1,375.04	\$1,274.49	\$1,395.24	\$1,361.25	\$1,982.90	\$1,433.65
	Median	\$1,120	\$1,290	\$1,230	\$973	\$1,170	\$1,140	\$1,198	\$1,100	\$1,209	\$1,119	\$1,750	\$1,200
	Minimum	\$0	\$0	\$300	\$480	\$200	\$0	\$150	\$0	\$167	\$167	\$250	\$0
	Maximum	\$6,900	\$6,001	\$3,201	\$1,778	\$1,970	\$6,001	\$5,200	\$6,900	\$3,610	\$3,601	\$6,001	\$6,900

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, and Overall Oct-Dec 2012

	Oct-12	Nov-12	Dec-12	Combined Oct-Dec 2012
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	5	3		4
Ease of getting around	3			
Safety walking around at night			4	7
Quality of daytime tours				6
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping	4	4		
Variety of shopping			5	3
Price of things on Guam			2	
Quality of hotel accommodations		2		2
Quality/cleanliness of air, sky				
Quality/cleanliness of parks				
Quality of landscape in Tumon			1	
Quality of landscape in Guam	1	1		1
Quality of ground handler			3	5
Quality/cleanliness of transportation vehicles	2			
% of Per Person On Island Expenditures Accounted For	54.7%	50.6%	45.2%	48.3%

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 December 2012 Period. By rank order they are:
 - **Quality of landscape in Tumon,**
 - **Price of things on Guam,**
 - **Quality of ground handler,**
 - **Safety walking around at night, and**
 - **Variety of shopping.**
- With all five factors the overall r^2 is .452 meaning that **45.2% of overall satisfaction is accounted for by these five factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2012, and Overall Oct-Dec 2012				
	Oct-12	Nov-12	Dec-12	Combined Oct-Dec 2012
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks				
Ease of getting around			1	
Safety walking around at night				
Quality of daytime tours				
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping			3	1
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			2	2
Quality/cleanliness of transportation vehicles				
% of Per Person On Island Expenditures Accounted For	0.0%	0.0%	4.8%	1.4%
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 three significant factors in the December 2012 Period. By rank order they are:
 - **Ease of getting around,**
 - **Quality of ground handler, and**
 - **Quality of shopping.**
- With all three factors the overall r^2 is .048 meaning that **4.8% of per person on island expenditure is accounted for by these three factors.**