



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2013 Market Segmentation

### FEBUARY 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 **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.

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# 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.

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# Highlighted Segments Parameters

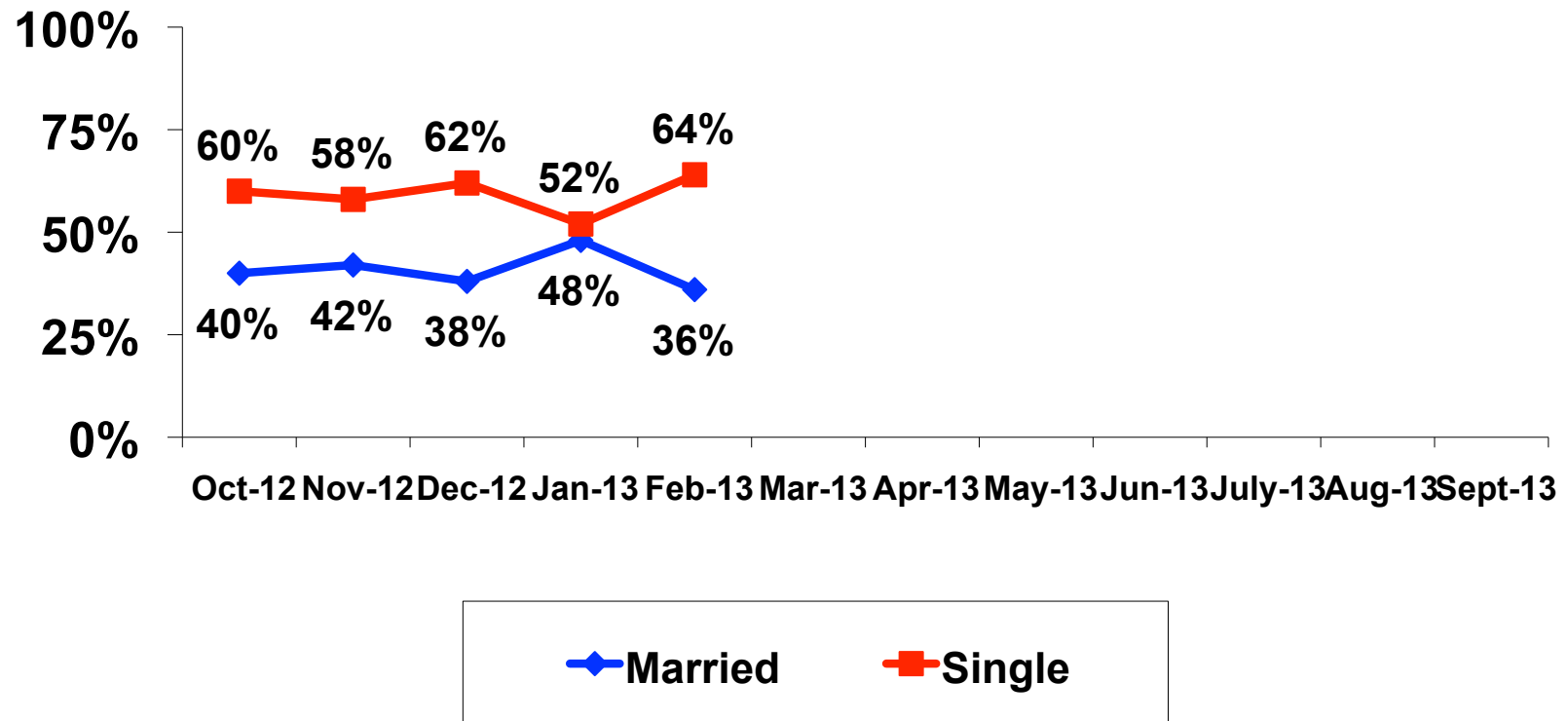
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

# 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
<b>Families</b>	39%	37%	34%	45%	34%							
<b>Office Lady</b>	15%	10%	13%	11%	9%							
<b>Group</b>	3%	3%	2%	3%	3%							
<b>Silver</b>	6%	5%	6%	3%	3%							
<b>Wedding</b>	10%	9%	7%	7%	9%							
<b>Sport</b>	37%	39%	32%	41%	43%							
<b>18-35</b>	67%	72%	69%	62%	80%							
<b>36-55</b>	23%	20%	22%	33%	17%							
<b>Child</b>	13%	9%	13%	21%	12%							
<b>Honeymoon</b>	5%	6%	6%	2%	4%							
<b>Repeat</b>	42%	37%	38%	47%	35%							
<b>TOTAL</b>	<b>351</b>	<b>351</b>	<b>352</b>	<b>351</b>	<b>352</b>							

SECTION 1  
**PROFILE OF RESPONDENTS**

# Marital Status Tracking

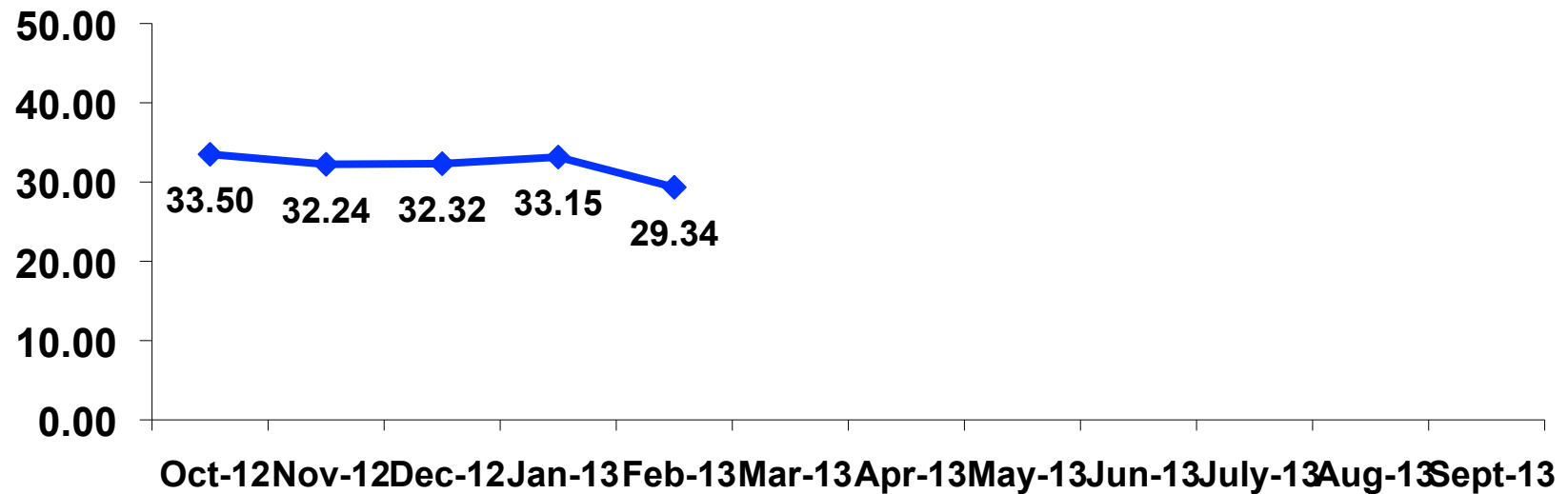


# Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	36%	83%	27%	11%	100%	55%	33%	22%	86%	95%	93%	51%
	Single	64%	17%	73%	89%		45%	67%	78%	14%	5%	7%	49%
	Total Count	352	118	33	9	9	33	152	280	59	43	15	124



# Average Age Tracking



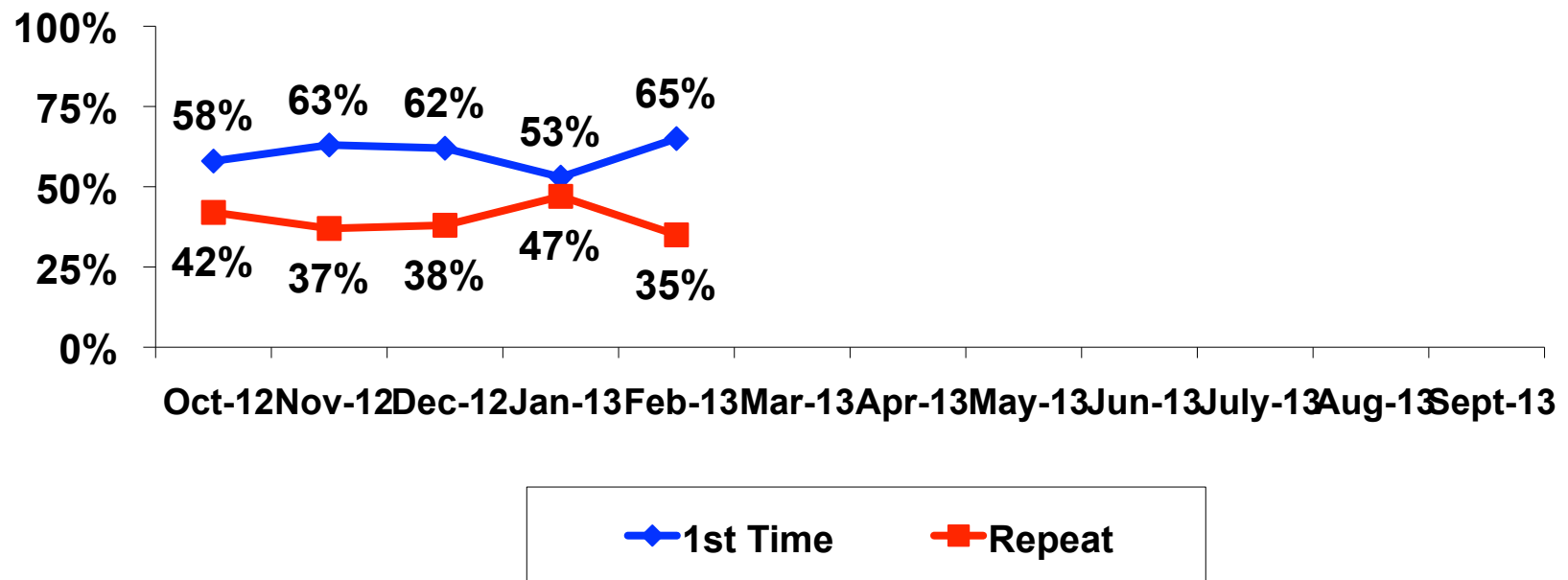
# Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	44%	9%	12%	56%		3%	46%	55%			13%	24%
	25-34	33%	37%	73%	44%		76%	36%	42%		29%	67%	39%
	35-49	16%	36%	12%			15%	13%	3%	80%	48%	20%	25%
	50+	7%	18%	3%		100%	6%	5%		20%	24%		11%
	Total Count	350	117	33	9	9	33	151	280	59	42	15	122
QF	Mean	29.34	38.43	29.33	24.11	65.44	31.79	27.82	24.87	44.03	43.48	30.00	33.61
	Median	26	35	27	22	64	29	26	23	43	42	29	30

# Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	7%	2%		13%	11%	6%	6%	8%	2%			3%
	Y2.0M-Y3.0M	10%	5%	15%		11%	3%	11%	11%	5%	2%	7%	9%
	Y3.0M-Y4.0M	12%	6%	24%	13%		13%	17%	15%	2%	5%	7%	12%
	Y4.0M-Y5.0M	12%	16%	6%	13%	22%	16%	11%	13%	7%	12%	33%	11%
	Y5.0M-Y7.0M	22%	26%	21%		22%	34%	21%	20%	32%	27%	27%	26%
	Y7.0M-Y10.0M	15%	25%	15%	25%	22%	13%	14%	11%	30%	29%	27%	20%
	Y10.0M+	16%	17%	18%	13%	11%	13%	13%	15%	21%	24%		16%
	No Income	6%	2%		25%		3%	8%	8%	2%			3%
	Total Count	307	111	33	8	9	32	131	238	57	41	15	110

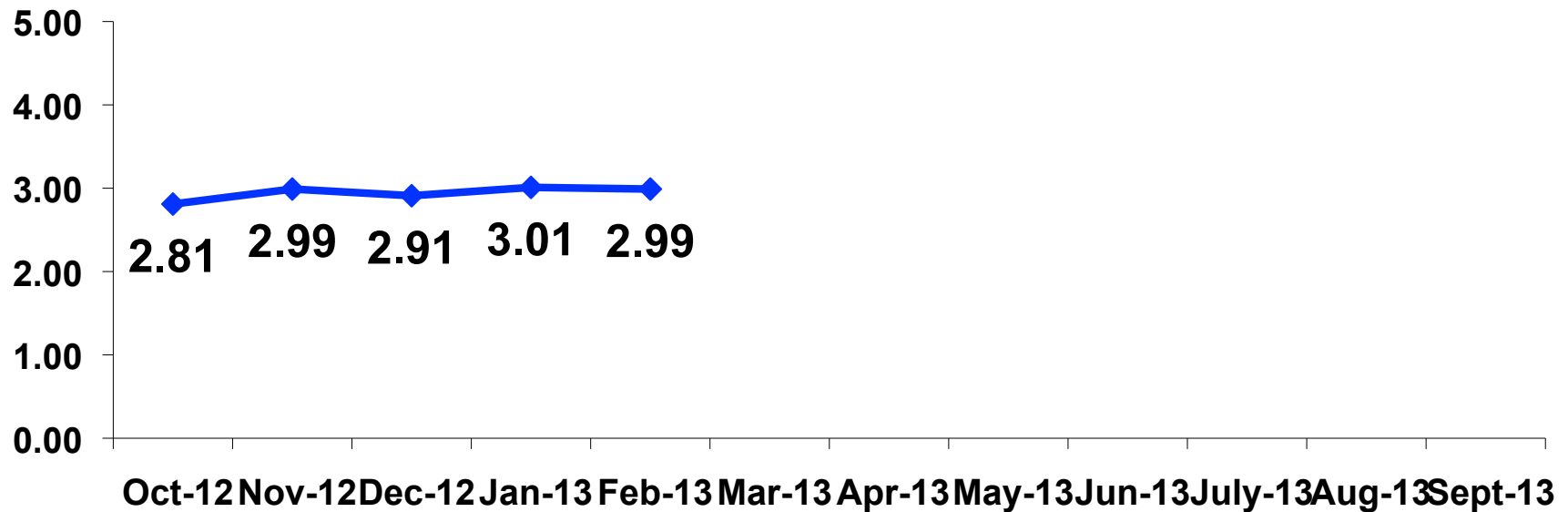
# Prior Trips to Guam Tracking



# Prior Trips to Guam Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	65%	55%	52%	78%	56%	76%	68%	72%	36%	37%	87%	
	No	35%	45%	48%	22%	44%	24%	32%	28%	64%	63%	13%	100%
	Total Count	351	118	33	9	9	33	151	279	59	43	15	124

# 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	2.99	3.17	3.00	3.22	4.11	3.12	3.01	2.91	3.17	3.19	3.67	3.15
	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	58%	53%	73%		44%	42%	58%	61%	48%	44%	60%	54%
	Full package tour	30%	35%	15%		22%	39%	29%	28%	41%	37%	40%	28%
	Individually arranged travel (FIT)	7%	10%	12%		33%	12%	6%	6%	9%	19%		13%
	Group tour	3%	1%		100%		3%	3%	3%				2%
	Company paid travel	2%	1%					4%	2%	2%			3%
	Other	0%	1%				3%	1%	0%				
	Total Count	351	118	33	9	9	33	152	280	58	43	15	124

# Travel Motivation Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	23%	32%	27%	11%	11%	9%	23%	18%	46%	47%	13%	66%
	Price	26%	25%	36%	22%	22%	6%	32%	26%	31%	23%	20%	19%
	Visit friends/ Relatives	2%	1%	3%			6%	1%	3%	2%		7%	3%
	Recomm- friend/family/trvl agnt	26%	13%	24%	33%	33%	3%	28%	29%	14%	7%	13%	17%
	Scuba	6%	6%	6%				11%	8%	2%	2%	13%	2%
	Water sports	29%	20%	27%	11%	11%	3%	43%	33%	17%	19%	20%	22%
	Short travel time	52%	61%	76%	33%	44%	18%	52%	49%	61%	67%	53%	58%
	Golf	3%	7%	3%		33%		5%	1%	5%	9%		8%
	Relax	30%	31%	55%	11%	44%	3%	36%	29%	36%	37%	20%	38%
	Company/ Business Trip	3%			22%			3%	3%	3%			3%
	Company Sponsored	1%						1%	1%	2%			2%
	Convention/ Trade/ Conference	0%								2%			1%
	Safe	21%	24%	21%	33%	22%		24%	20%	25%	28%	13%	23%
	Natural beauty	62%	61%	64%	44%	78%	12%	64%	64%	53%	72%	47%	56%
	Shopping	36%	26%	58%	33%	22%	3%	44%	40%	20%	23%	13%	28%
	Career Cert/ Testing	1%	1%				3%	1%	1%				
	Married/ Attn wedding	9%	18%	15%	11%		100%	7%	9%	12%	7%	33%	6%
	Honeymoon	4%	13%	3%			15%	5%	5%	3%		100%	2%
	Pleasure	53%	50%	64%	56%	67%	24%	60%	55%	42%	53%	20%	45%
	Organized sports	3%	3%	6%				4%	3%	3%	2%	7%	3%
	Other	6%	5%					5%	5%	8%	7%	7%	6%
	Total Count	351	117	33	9	9	33	151	280	59	43	15	124

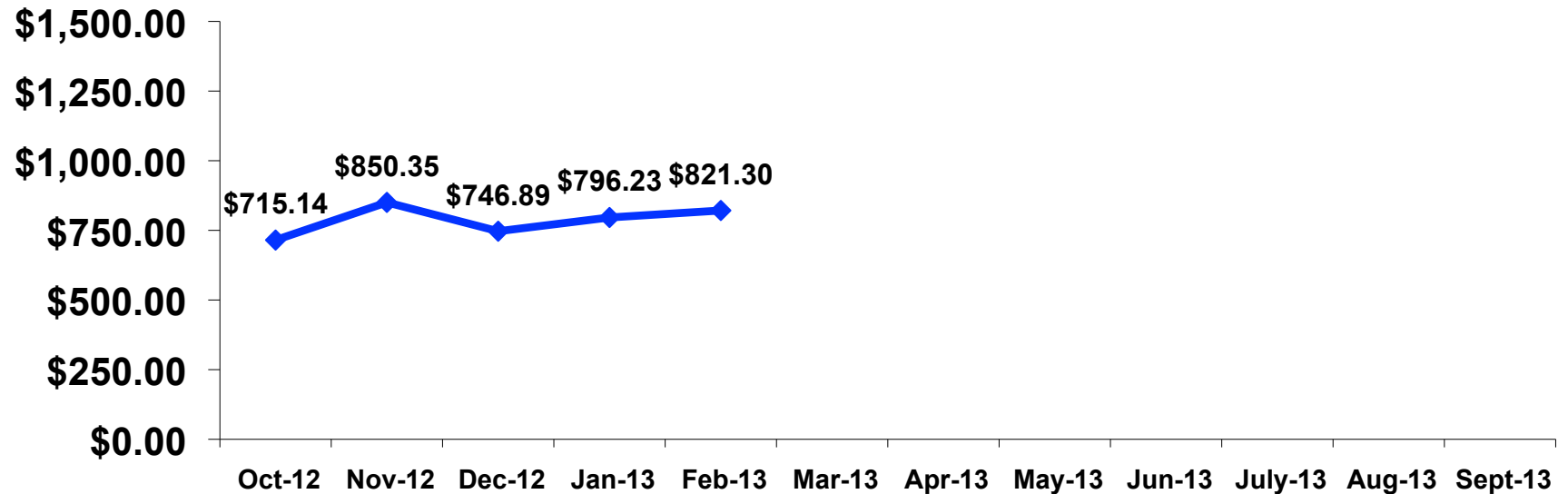
# Information Sources Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
	-	-	-	-	-	-	-	-	-	-	-	-	
Q1 Internet	75%	84%	73%	67%	33%	79%	81%	75%	83%	77%	93%	73%	
Travel Guidebook- Bookstore	64%	66%	79%	33%	56%	79%	68%	62%	73%	63%	60%	60%	
Travel Agent Brochure	51%	49%	45%	44%	56%	36%	57%	52%	46%	44%	73%	41%	
Magazine (Consumer)	43%	51%	30%	22%	67%	39%	45%	43%	42%	53%	53%	37%	
Friend/ Relative	41%	28%	45%	33%	11%	39%	45%	46%	22%	28%	27%	27%	
TV	30%	35%	27%	11%	44%	30%	29%	29%	27%	33%	40%	25%	
Prior Trip	28%	38%	48%	22%	22%	12%	27%	22%	54%	53%	13%	79%	
Consumer Trvl Show	5%	3%	3%	11%	11%		4%	5%	3%	2%		2%	
GVB Office	2%	1%				6%	1%	2%			7%	1%	
Co-Worker/ Company Trvl Dept	1%		6%				2%	1%				1%	
Travel Trade Show	1%						1%	1%				1%	
GVB Promo	1%						1%	1%				1%	
Newspaper	1%						1%	1%					
Total	Count	350	118	33	9	9	33	150	279	59	43	15	123

# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures Tracking

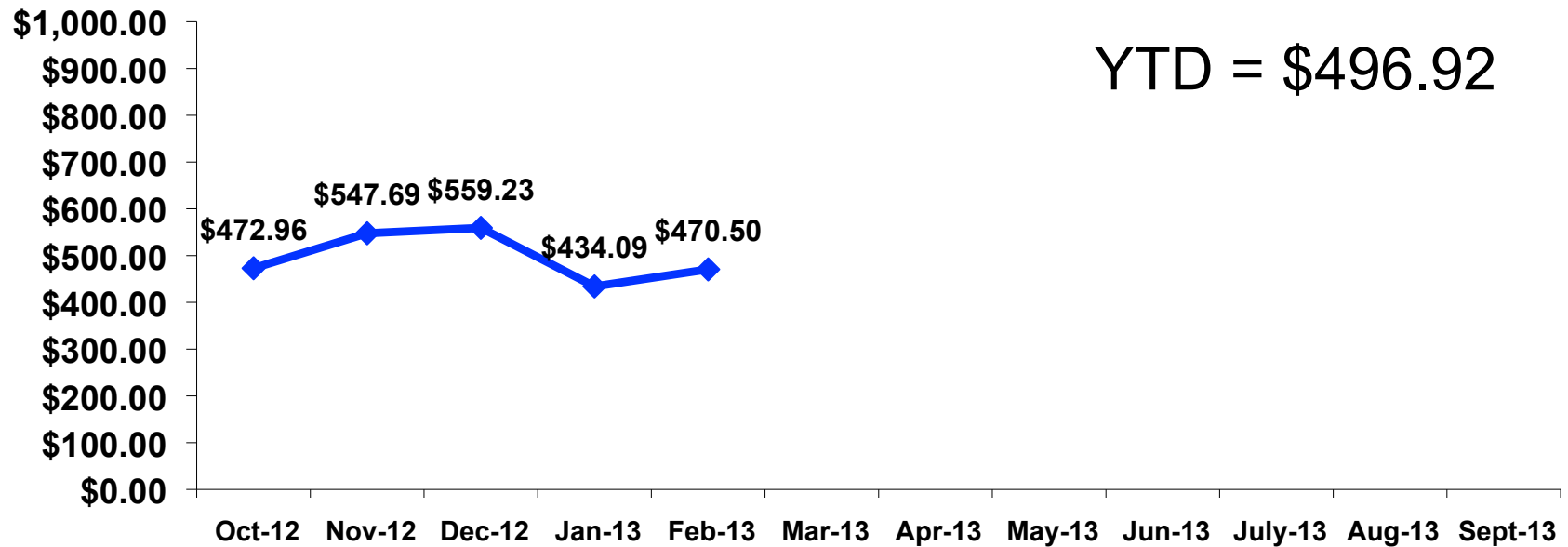
YTD=\$785.96



# 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	\$821.30	\$913.75	\$783.98	\$806.45	\$768.52	\$1,167.43	\$750.92	\$815.46	\$878.15	\$843.72	\$1,578.21	\$766.68
	Median	\$753	\$828	\$753	\$645	\$806	\$860	\$699	\$753	\$887	\$887	\$1,075	\$753
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$6,452	\$6,452	\$1,344	\$1,935	\$1,613	\$6,452	\$2,043	\$6,452	\$2,796	\$1,858	\$6,452	\$3,441

# On-Island Expenditures Tracking



# On-Island Expenditures Per Person Segmentation

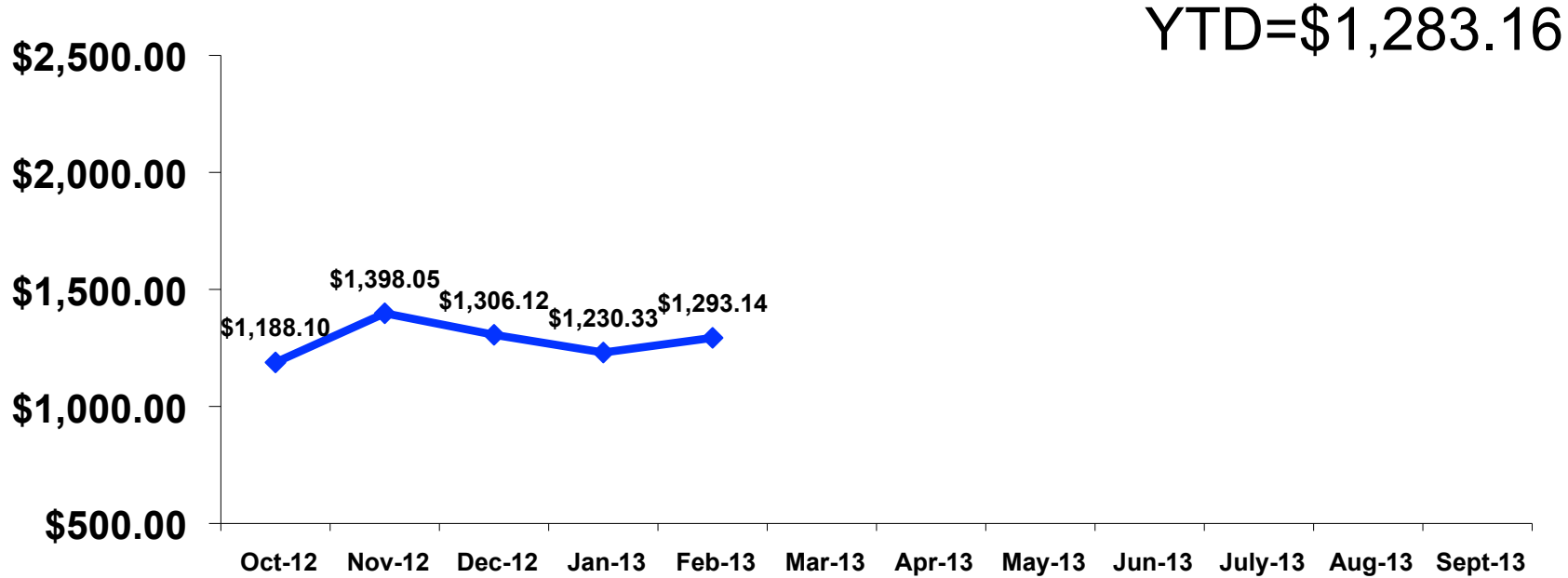
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$470.50	\$424.58	\$663.36	\$385.89	\$473.56	\$445.65	\$495.76	\$475.86	\$447.61	\$388.50	\$484.23	\$528.69
	Median	\$368	\$333	\$700	\$350	\$367	\$333	\$400	\$400	\$305	\$250	\$400	\$388
	Minimum	\$0	\$0	\$0	\$153	\$0	\$50	\$0	\$0	\$0	\$0	\$100	\$0
	Maximum	\$2,550	\$2,550	\$1,500	\$800	\$1,167	\$2,500	\$2,500	\$2,500	\$2,550	\$2,125	\$1,200	\$2,550



# 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	\$32.57	\$60.38	\$57.97	\$22.22	\$136.33	\$9.06	\$31.51	\$25.12	\$49.56	\$61.53	\$38.93	\$50.73
	Median	\$0	\$0	\$0	\$0	\$80	\$0	\$0	\$0	\$0	\$0	\$6	\$0
F&B FF/STORE	Mean	\$33.87	\$49.99	\$34.67	\$7.00	\$26.67	\$34.94	\$27.22	\$27.13	\$50.24	\$75.44	\$21.67	\$46.20
	Median	\$10	\$11	\$10	\$0	\$0	\$13	\$10	\$10	\$24	\$30	\$10	\$10
F&B RESTRNT	Mean	\$72.53	\$106.86	\$51.64	\$30.00	\$77.78	\$70.06	\$65.90	\$56.68	\$137.29	\$120.77	\$41.27	\$108.97
	Median	\$28	\$50	\$20	\$0	\$60	\$10	\$24	\$20	\$60	\$50	\$20	\$20
OPT TOUR	Mean	\$99.47	\$148.69	\$74.52	\$75.56	\$87.00	\$35.45	\$119.32	\$79.92	\$196.64	\$115.12	\$200.67	\$139.70
	Median	\$0	\$0	\$20	\$0	\$40	\$0	\$50	\$0	\$0	\$0	\$50	\$0
GIFT- SELF	Mean	\$147.78	\$178.98	\$319.58	\$111.11	\$110.00	\$145.45	\$150.36	\$142.17	\$178.29	\$163.93	\$96.73	\$172.54
	Median	\$40	\$100	\$150	\$50	\$110	\$30	\$30	\$30	\$100	\$100	\$100	\$85
GIFT- OTHER	Mean	\$111.49	\$160.64	\$124.42	\$110.00	\$140.67	\$140.45	\$111.93	\$100.62	\$150.75	\$167.12	\$215.33	\$130.21
	Median	\$50	\$100	\$85	\$100	\$131	\$100	\$50	\$50	\$100	\$100	\$60	\$50
TRANS	Mean	\$13.91	\$19.75	\$17.64	\$8.89	\$17.33	\$14.48	\$11.83	\$12.57	\$15.95	\$22.74	\$14.27	\$23.03
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$187.98	\$309.34	\$145.67	\$60.00	\$594.78	\$234.24	\$148.07	\$133.51	\$380.07	\$561.40	\$243.87	\$215.12
	Median	\$0	\$0	\$0	\$0	\$200	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$699.09	\$1,034.19	\$826.09	\$424.78	\$1,179.44	\$684.15	\$665.54	\$577.46	\$1,158.78	\$1,286.88	\$872.73	\$886.01
	Median	\$500	\$705	\$740	\$370	\$800	\$532	\$550	\$485	\$710	\$800	\$724	\$600

# 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	\$1,293.14	\$1,338.33	\$1,447.34	\$1,192.34	\$1,242.07	\$1,613.07	\$1,249.96	\$1,293.03	\$1,325.75	\$1,232.22	\$2,062.44	\$1,295.37
	Median	\$1,145	\$1,257	\$1,445	\$1,038	\$1,365	\$1,260	\$1,175	\$1,140	\$1,265	\$1,137	\$1,738	\$1,206
	Minimum	\$0	\$0	\$160	\$350	\$0	\$133	\$40	\$0	\$200	\$0	\$600	\$0
	Maximum	\$6,602	\$6,602	\$2,483	\$2,135	\$2,371	\$6,602	\$3,747	\$6,602	\$3,200	\$3,200	\$6,602	\$4,941

SECTION 4  
**ADVANCED STATISTICS**

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# 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 2013, and Overall Oct-2012 - Feb 2013						
	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Combine d Oct-2012 - Feb 2013
Drivers:	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	5	3				4
Ease of getting around	3				<b>3</b>	9
Safety walking around at night			4			5
Quality of daytime tours						6
Variety of daytime tours					<b>4</b>	
Quality of nighttime tours						
Variety of nighttime tours						
Quality of shopping	4	4			<b>1</b>	
Variety of shopping			5	3		3
Price of things on Guam			2			
Quality of hotel accommodations		2		2		2
Quality/cleanliness of air, sky						
Quality/cleanliness of parks						
Quality of landscape in Tumon			1			8
Quality of landscape in Guam	1	1		1	<b>2</b>	1
Quality of ground handler			3			7
Quality/cleanliness of transportation vehicles	2				<b>5</b>	
% of Per Person On Island Expenditures Accounted For	54.7%	50.6%	45.2%	42.4%	<b>41.5%</b>	46.0%

NOTE: Only significant drivers are included.

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# Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by five significant factors in the February 2013 Period. By rank order they are:
  - **Quality of shopping,**
  - **Quality of landscape in Guam,**
  - **Ease of getting around,**
  - **Variety of daytime tours, and**
  - **Quality/cleanliness of transportation vehicles.**
- With all five factors the overall  $r^2$  is .415 meaning that **41.5% of overall satisfaction is accounted for by these five factors.**

**Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2012, Jan, Feb 2013 and Overall Oct-2012-Feb 2013**

	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Combined Oct-2012- Feb 2013
Drivers:	rank	rank	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				1		
Quality of nighttime tours				2		
Variety of nighttime tours				3		1
Quality of shopping			3	4		2
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			
Quality/cleanliness of transportation vehicles						
% of Per Person On Island Expenditures Accounted For	0.0%	0.0%	4.8%	16.2%	<b>0.0%</b>	0.9%

NOTE: Only significant drivers are included.



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# Drivers of Per Person On-Island Expenditure

- **Per Person On Island Expenditure** of Japanese visitors on Guam is driven by *no significant factors* in the February 2013 Period.