



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013 Market Segmentation

JANUARY 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 **351** 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 **351** 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

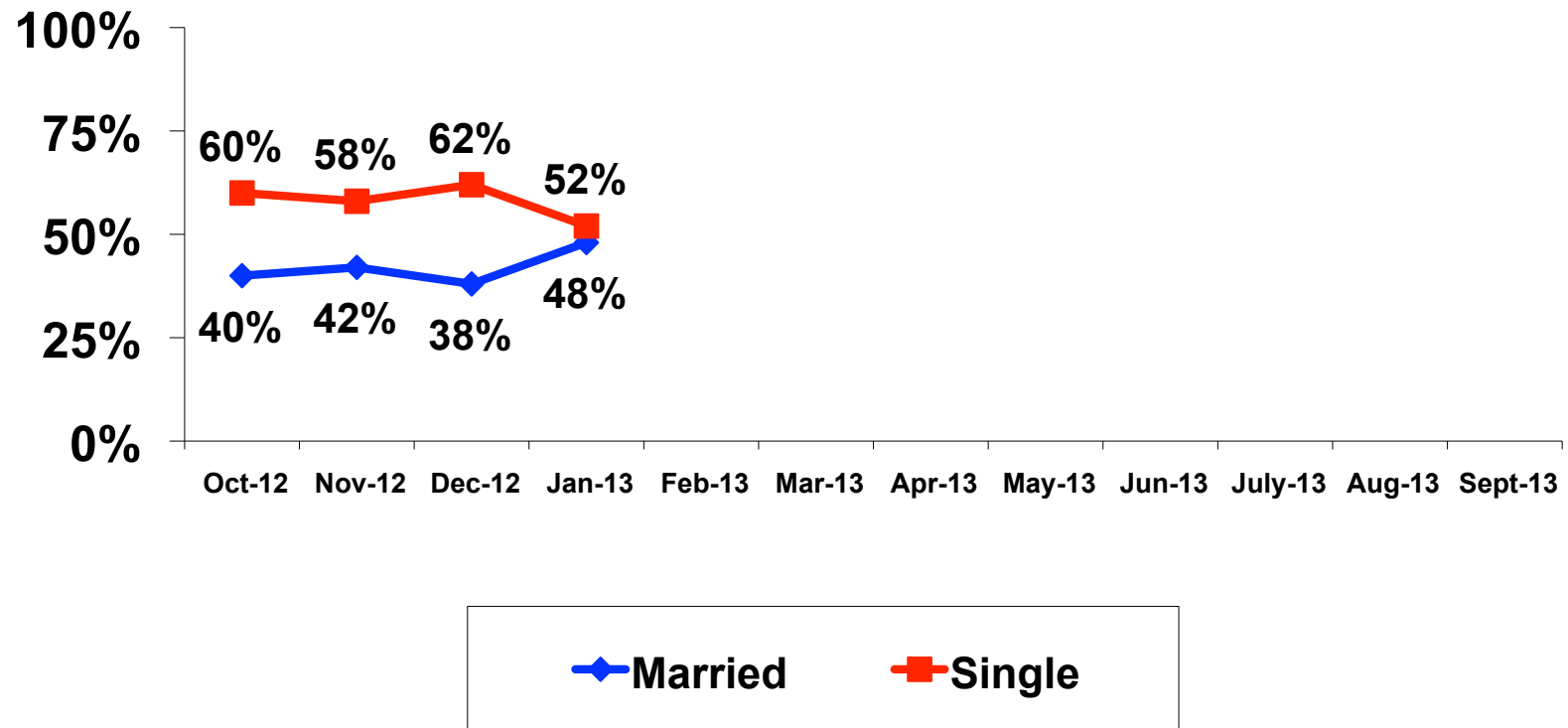
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%								
Office Lady	15%	10%	13%	11%								
Group	3%	3%	2%	3%								
Silver	6%	5%	6%	3%								
Wedding	10%	9%	7%	7%								
Sport	37%	39%	32%	41%								
18-35	67%	72%	69%	62%								
36-55	23%	20%	22%	33%								
Child	13%	9%	13%	21%								
Honeymoon	5%	6%	6%	2%								
Repeat	42%	37%	38%	47%								
TOTAL	351	351	352	351								

SECTION 1
PROFILE OF RESPONDENTS

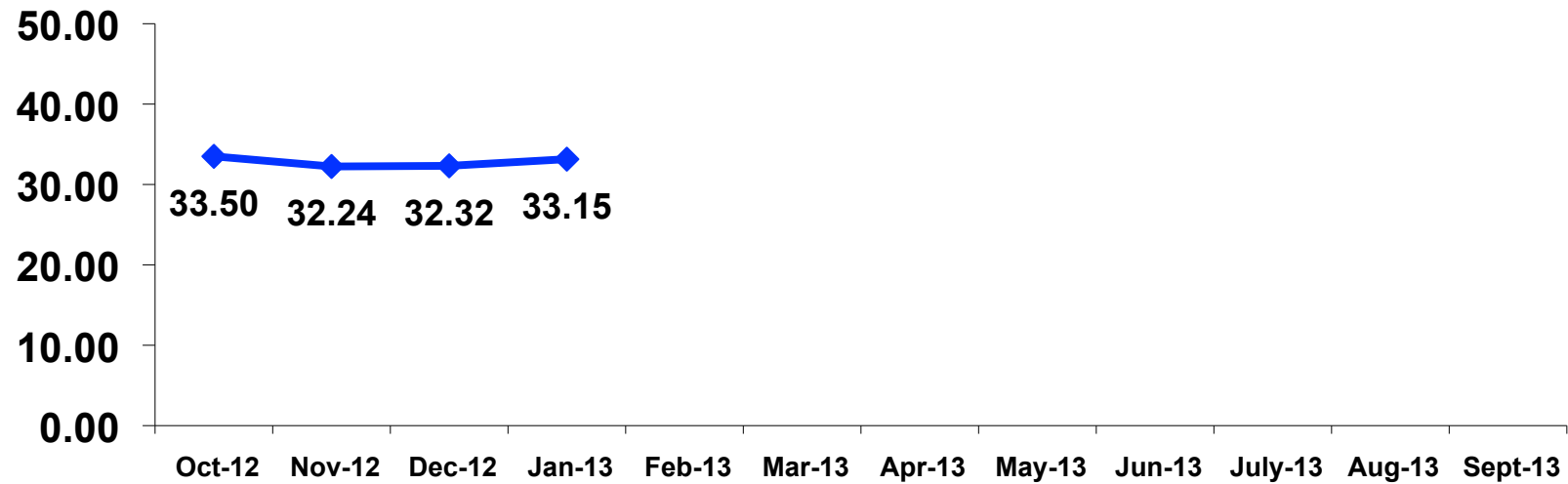
Marital Status Tracking



Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	48%	89%	24%	50%	90%	50%	43%	23%	88%	96%	100%	63%
	Single	52%	11%	76%	50%	10%	50%	57%	77%	12%	4%		37%
	Total Count	350	157	37	10	10	24	145	217	113	74	8	164

Average Age Tracking



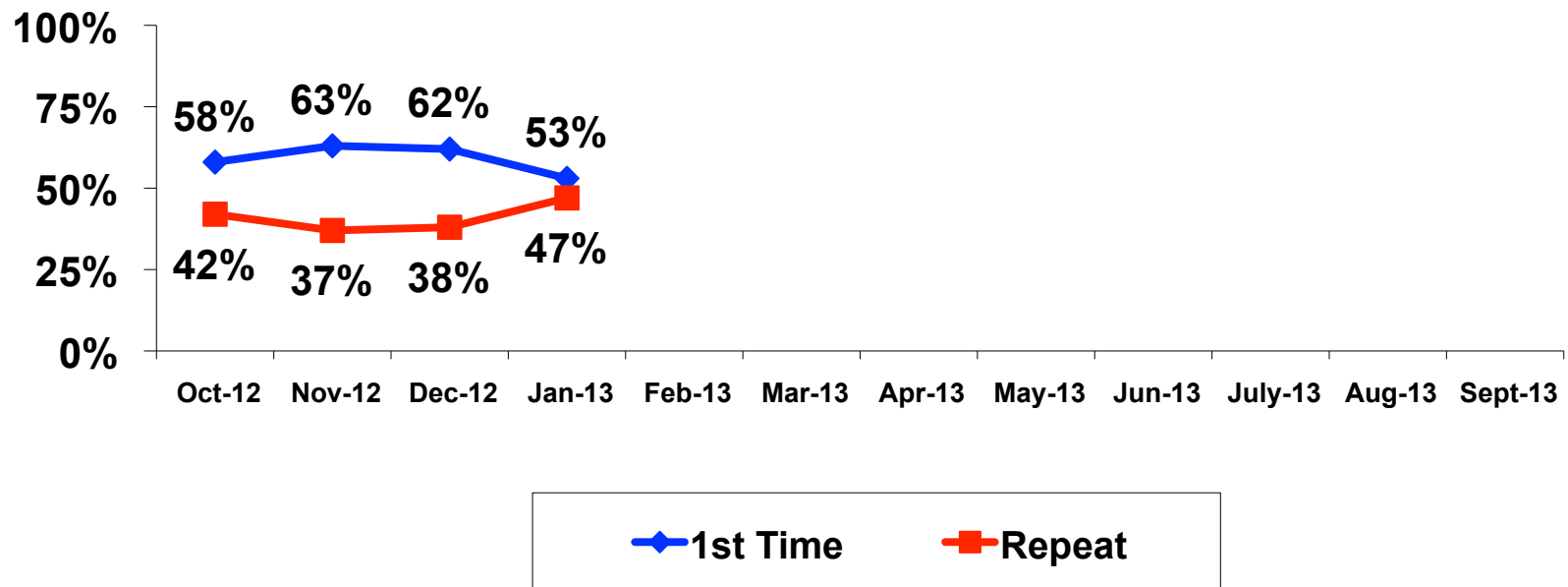
Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	31%	6%	33%	30%		4%	34%	49%		1%	25%	15%
	25-34	29%	19%	50%	30%		79%	28%	47%		13%	38%	26%
	35-49	30%	57%	8%	30%		4%	32%	4%	85%	76%	38%	46%
	50+	10%	18%	8%	10%	100%	13%	6%		15%	9%		13%
	Total Count	348	158	36	10	10	24	144	217	114	75	8	162
QF	Mean	33.15	40.74	29.28	31.40	62.30	31.71	32.07	25.65	43.35	41.17	31.00	37.33
	Median	30	40	26	31	62	27	28	25	43	41	31	38

Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q26	<Y2.0 million	8%	5%	13%	13%			7%	11%	2%	3%		6%	
	Y2.0M-Y3.0M	11%	8%	29%	13%	20%	4%	10%	15%	5%	7%	43%	8%	
	Y3.0M-Y4.0M	13%	8%	19%	13%		4%	16%	15%	12%	6%		10%	
	Y4.0M-Y5.0M	16%	18%	10%	25%	10%	26%	17%	17%	15%	16%	29%	16%	
	Y5.0M-Y7.0M	20%	21%	13%	13%	30%	35%	18%	15%	25%	20%	14%	23%	
	Y7.0M-Y10.0M	14%	19%	10%	25%	10%	26%	13%	11%	18%	19%	14%	16%	
	Y10.0M+	17%	19%	6%		30%	4%	18%	13%	22%	29%		20%	
	No Income	3%	1%					2%	4%	2%	1%		1%	
	Total	Count	301	144	31	8	10	23	124	179	106	70	7	143

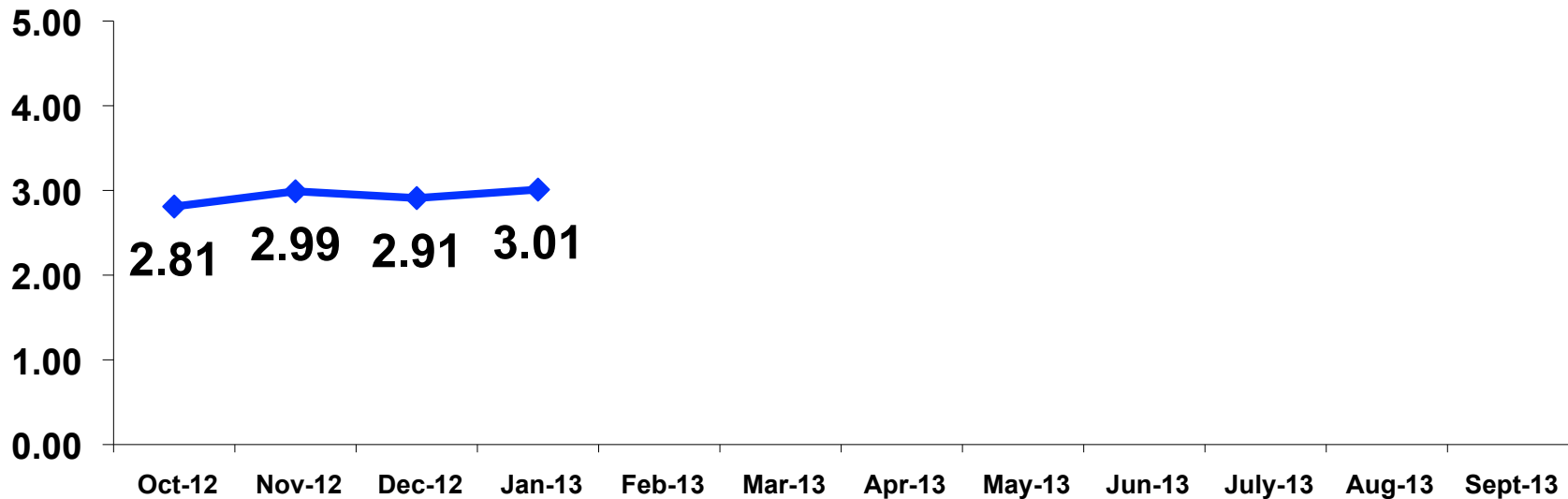
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	53%	36%	62%	80%	40%	75%	59%	67%	31%	24%	100%	
	No	47%	64%	38%	20%	60%	25%	41%	33%	69%	76%		100%
	Total Count	351	158	37	10	10	24	145	217	114	75	8	164

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	3.01	3.29	2.65	3.90	3.10	3.09	3.10	2.86	3.27	3.71	3.25	3.16
	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	61%	56%	73%		70%	67%	59%	65%	51%	47%	75%	57%
	Full package tour	24%	22%	22%		20%	25%	30%	24%	25%	29%		26%
	Individually arranged travel (FIT)	9%	17%			10%	4%	7%	4%	18%	23%	13%	15%
	Group tour	3%	1%		100%			1%	4%	2%			1%
	Company paid travel	2%	2%	3%				3%	3%	2%		13%	1%
	Other	1%	2%	3%			4%		0%	2%	1%		
	Total Count	351	158	37	10	10	24	145	217	114	75	8	164

Travel Motivation Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	38%	56%	38%	20%	30%	4%	33%	25%	63%	70%		81%
	Price	27%	23%	16%	10%	30%	4%	32%	31%	19%	23%	13%	23%
	Visit friends/ Relatives	3%	3%	3%		10%		2%	2%	4%			4%
	Reconnun- friend/family/trvl agnt	19%	11%	24%	20%	20%		26%	24%	13%	15%		13%
	Scuba	6%	2%	11%	10%		8%	12%	8%	3%	3%		4%
	Water sports	21%	20%	14%			13%	31%	22%	22%	26%	13%	18%
	Short travel time	47%	62%	43%	20%	60%	4%	46%	38%	63%	66%	38%	60%
	Golf	3%	6%		10%	20%		5%		7%	1%		6%
	Relax	35%	39%	46%		50%	4%	34%	32%	37%	35%	13%	45%
	Company/ Business Trip	6%	4%		50%			5%	5%	7%	4%		2%
	Company Sponsored	1%	1%		20%			1%	2%				1%
	Safe	17%	25%	22%	10%	20%		19%	12%	28%	28%	13%	24%
	Natural beauty	54%	54%	54%	40%	60%	13%	57%	53%	51%	59%	38%	55%
	Shopping	34%	32%	43%		20%	17%	30%	35%	32%	35%	38%	37%
	Career Cert/ Testing	0%							0%				
	Married/ Attn wedding	7%	6%	5%		10%	100%	5%	9%	3%	3%	13%	4%
	Honeymoon	2%	5%	3%				1%	2%	3%		100%	
	Pleasure	52%	51%	59%	10%	50%	17%	54%	53%	52%	59%	25%	56%
	Organized sports	2%	1%	3%				3%	2%	2%	3%		3%
	Other	4%	4%	5%	10%			3%	4%	4%	5%		4%
	Total Count	349	157	37	10	10	24	145	216	113	74	8	163

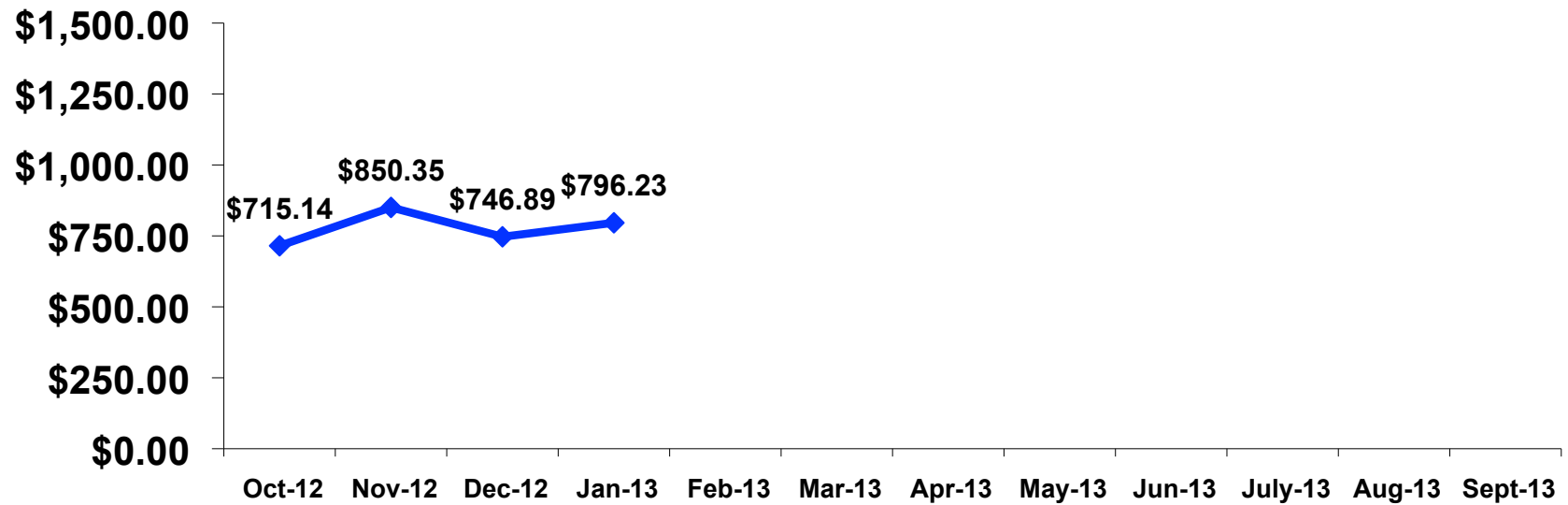
Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	78%	83%	81%	50%	60%	71%	79%	77%	84%	85%	100%	79%	
	Travel Guidebook- Bookstore	56%	59%	65%	40%	30%	58%	58%	59%	51%	65%	63%	58%	
	Travel Agent Brochure	42%	37%	43%	30%	50%	42%	44%	45%	33%	35%	75%	33%	
	Prior Trip	41%	59%	35%	20%	60%	21%	35%	27%	64%	70%		88%	
	Magazine (Consumer)	39%	33%	46%	10%	20%	33%	38%	41%	33%	35%	75%	33%	
	Friend/ Relative	28%	13%	41%		10%	33%	34%	38%	13%	12%	38%	17%	
	TV	9%	10%	22%	10%	10%	4%	8%	9%	10%	8%	13%	9%	
	Co-Worker/ Company Trvl Dept	5%	4%	5%	20%	10%	13%	4%	4%	6%	5%		4%	
	Consumer Trvl Show	3%	2%		10%			5%	4%	2%	1%		2%	
	GVB Office	1%	1%					1%	1%				1%	
	GVB Promo	1%	1%					1%	1%	1%	1%			
	Other	1%	1%					1%		2%			1%	
	Travel Trade Show	0%		3%				1%	0%					
	Radio	0%			10%				0%				1%	
	Newspaper	0%							0%					
	Total	Count	349	157	37	10	10	24	144	216	113	74	8	163

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

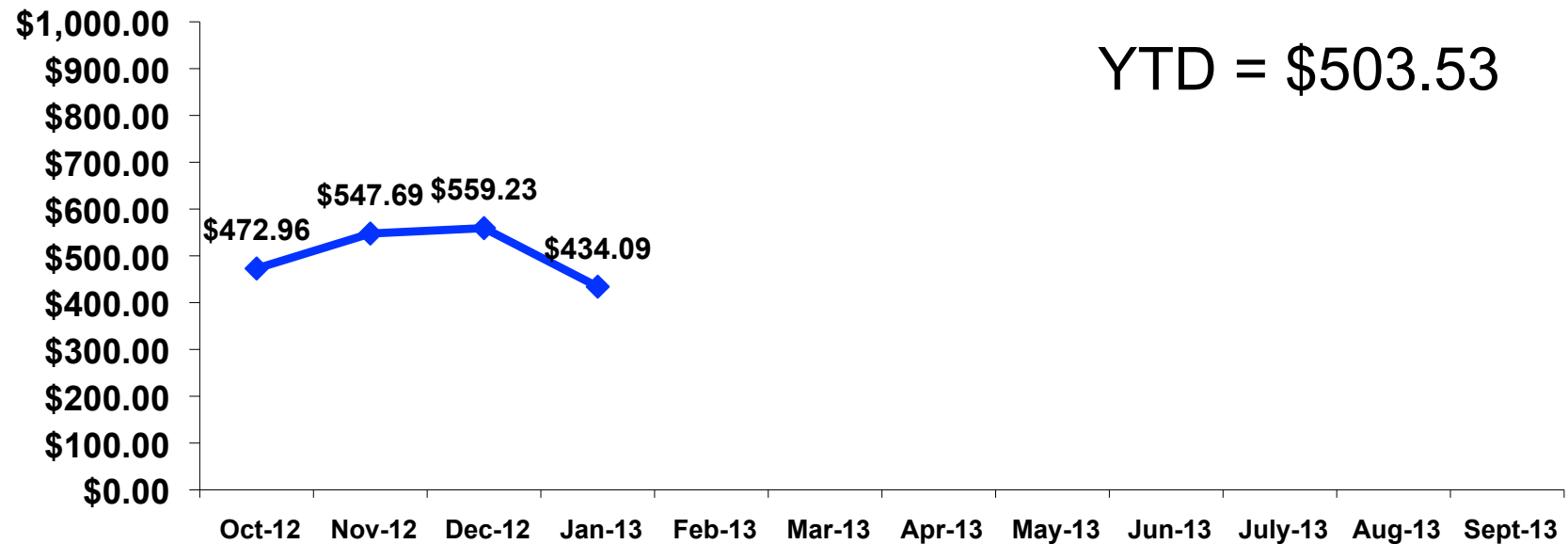
YTD=\$777.13



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	\$796.23	\$903.97	\$879.03	\$400.25	\$982.68	\$1,057.95	\$816.67	\$735.74	\$867.31	\$1,014.20	\$1,141.23	\$843.50
	Median	\$704	\$845	\$789	\$0	\$944	\$964	\$733	\$676	\$789	\$939	\$1,014	\$789
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$733	\$0
	Maximum	\$3,945	\$3,945	\$3,945	\$1,691	\$2,818	\$3,466	\$3,466	\$2,818	\$3,945	\$3,945	\$1,691	\$3,945

On-Island Expenditures Tracking



On-Island Expenditures Per Person Segmentation

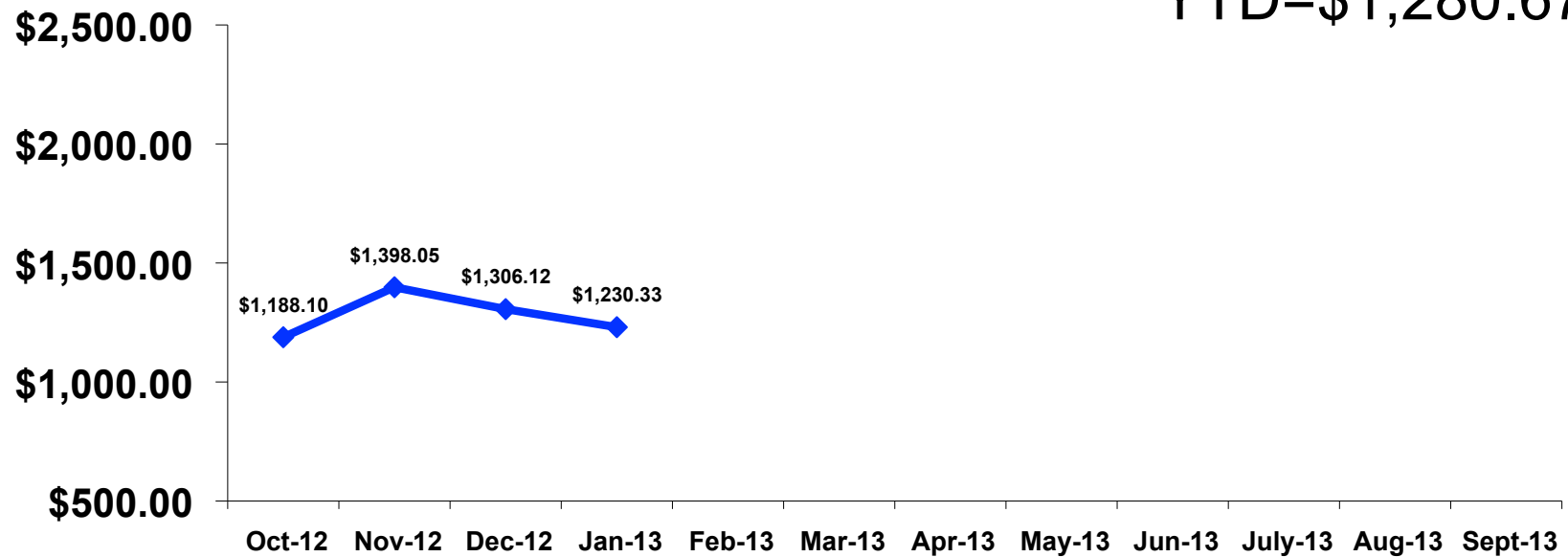
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$434.09	\$422.80	\$494.30	\$363.70	\$465.42	\$322.29	\$448.12	\$410.56	\$433.34	\$363.59	\$464.06	\$489.46
	Median	\$333	\$318	\$350	\$370	\$342	\$300	\$333	\$333	\$333	\$275	\$375	\$400
	Minimum	\$0	\$0	\$0	\$30	\$25	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,500	\$2,700	\$2,000	\$650	\$1,250	\$1,000	\$2,700	\$2,000	\$2,700	\$2,000	\$1,050	\$3,500

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	\$32.58	\$56.92	\$19.03	\$17.30	\$22.00	\$32.75	\$41.52	\$15.18	\$67.74	\$80.39	\$81.25	\$46.03
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$28.42	\$38.71	\$17.35	\$11.10	\$27.50	\$27.50	\$33.21	\$20.55	\$44.52	\$44.53	\$27.50	\$35.92
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$19	\$0	\$5	\$0
F&B RESTRNT	Mean	\$73.35	\$114.25	\$19.86	\$73.80	\$99.00	\$63.33	\$80.77	\$43.60	\$122.55	\$128.33	\$35.50	\$102.57
	Median	\$0	\$11	\$0	\$45	\$30	\$0	\$0	\$0	\$48	\$0	\$0	\$0
OPT TOUR	Mean	\$64.03	\$87.09	\$66.41	\$50.00	\$15.50	\$27.67	\$96.77	\$54.81	\$91.46	\$92.75	\$68.75	\$63.62
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$182.01	\$252.47	\$175.14	\$108.20	\$189.50	\$68.92	\$156.12	\$133.06	\$263.74	\$279.73	\$201.25	\$254.73
	Median	\$4	\$28	\$0	\$30	\$33	\$0	\$10	\$0	\$100	\$0	\$25	\$45
GIFT- OTHER	Mean	\$95.43	\$118.54	\$96.65	\$63.00	\$80.00	\$79.38	\$92.81	\$67.66	\$138.46	\$125.60	\$123.75	\$117.30
	Median	\$30	\$75	\$50	\$20	\$25	\$70	\$30	\$20	\$100	\$100	\$25	\$50
TRANS	Mean	\$16.16	\$25.39	\$7.78	\$16.40	\$7.00	\$18.96	\$18.63	\$9.39	\$29.00	\$34.53	\$6.88	\$22.76
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$274.21	\$424.30	\$181.27	\$73.90	\$412.00	\$119.33	\$274.40	\$190.91	\$344.82	\$544.99	\$383.25	\$397.32
	Median	\$0	\$0	\$0	\$12	\$150	\$0	\$0	\$0	\$0	\$10	\$33	\$0
TOTAL	Mean	\$765.24	\$1,114.20	\$583.49	\$413.70	\$852.50	\$425.83	\$791.89	\$536.37	\$1,097.03	\$1,323.52	\$928.13	\$1,039.64
	Median	\$500	\$800	\$400	\$370	\$850	\$300	\$520	\$400	\$800	\$1,000	\$750	\$605

Total Expenditures Tracking

YTD=\$1,280.67



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$1,230.33	\$1,326.77	\$1,373.33	\$763.95	\$1,448.10	\$1,380.24	\$1,264.79	\$1,146.30	\$1,300.66	\$1,377.78	\$1,605.29	\$1,332.96
	Median	\$1,127	\$1,210	\$1,166	\$607	\$1,314	\$1,208	\$1,189	\$1,057	\$1,230	\$1,239	\$1,746	\$1,208
	Minimum	\$0	\$0	\$0	\$200	\$295	\$150	\$0	\$0	\$0	\$0	\$733	\$0
	Maximum	\$4,270	\$4,270	\$4,270	\$1,912	\$3,151	\$4,016	\$4,016	\$3,128	\$4,270	\$4,270	\$2,253	\$4,270

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 2013, and Overall Oct-2012 - Jan 2013					
	Oct-12	Nov-12	Dec-12	Jan-13	Combined Oct-2012 - Jan 2013
Drivers:	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	5	3			5
Ease of getting around	3				
Safety walking around at night			4		4
Quality of daytime tours					7
Variety of daytime tours					
Quality of nighttime tours					
Variety of nighttime tours					
Quality of shopping	4	4			
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	1
Quality of ground handler			3		6
Quality/cleanliness of transportation vehicles	2				
% of Per Person On Island Expenditures Accounted For	54.7%	50.6%	45.2%	42.4%	46.7%
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 January 2013 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Quality of hotel accommodations, and**
 - **Variety of shopping.**
- With all three factors the overall r^2 is .424 meaning that **42.4% of overall satisfaction is accounted for by these three factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2012, Jan 2013 and Overall Oct-2012-Jan 2013					
Drivers:	Oct-12 rank	Nov-12 rank	Dec-12 rank	Jan-13 rank	Combined Oct-2012- Jan 2013 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	3
Variety of nighttime tours				3	2
Quality of shopping			3	4	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		
Quality/cleanliness of transportation vehicles					
% of Per Person On Island Expenditures Accounted For	0.0%	0.0%	4.8%	16.2%	1.7%

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 four significant factors in the January 2013 Period. By rank order they are:
 - **Variety of day time tours,**
 - **Quality of night time tours,**
 - **Variety of night time tours, and**
 - **Quality of shopping.**
- With all four factors the overall r^2 is .162 meaning that **16.2% of per person on island expenditure is accounted for by these four factors.**