



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013 Market Segmentation

JUNE 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

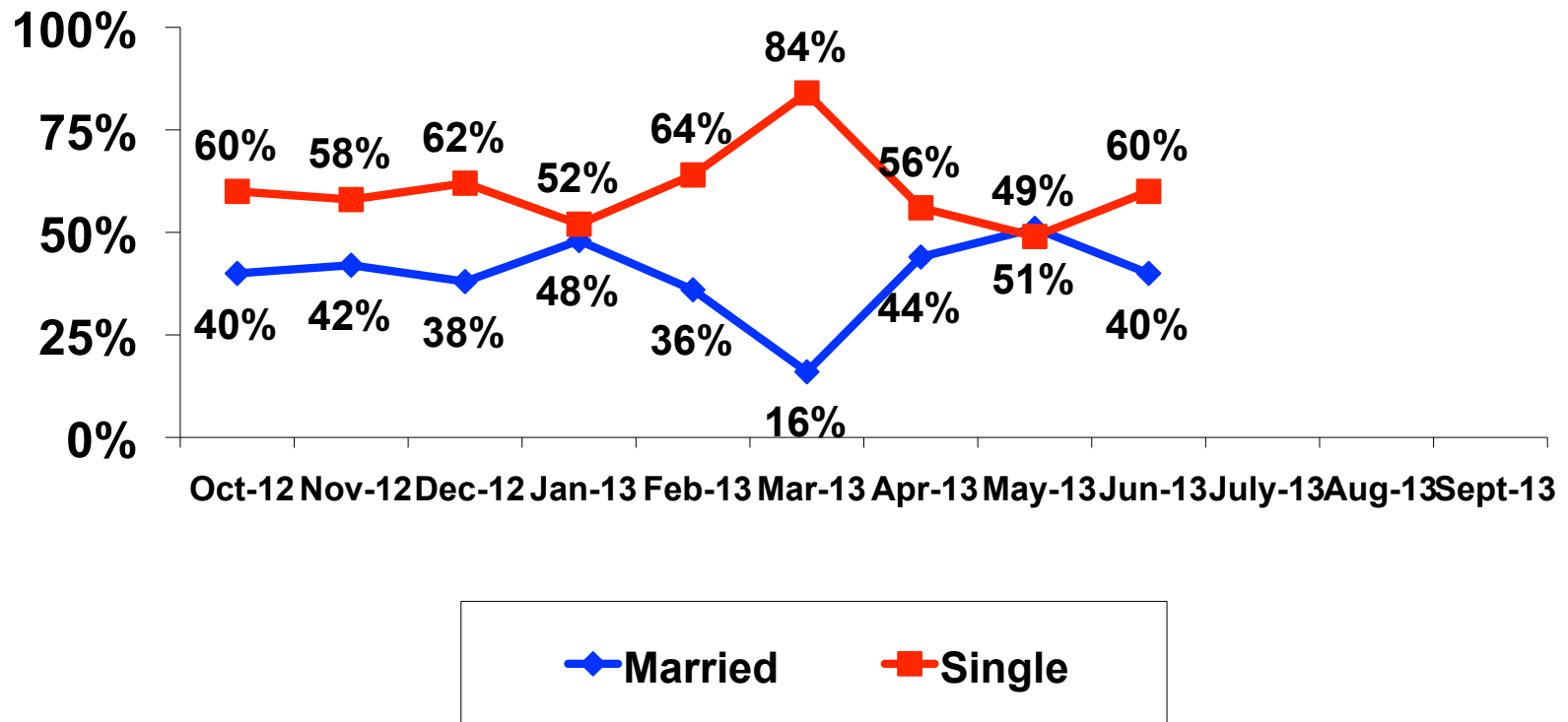
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%			
Office Lady	15%	10%	13%	11%	9%	4%	13%	10%	10%			
Group	3%	3%	2%	3%	3%	9%	1%	4%	3%			
Silver	6%	5%	6%	3%	3%	1%	4%	7%	3%			
Wedding	10%	9%	7%	7%	9%	5%	6%	7%	7%			
Sport	37%	39%	32%	41%	43%	42%	29%	36%	37%			
18-35	67%	72%	69%	62%	80%	85%	62%	59%	73%			
36-55	23%	20%	22%	33%	17%	11%	31%	30%	22%			
Child	13%	9%	13%	21%	12%	6%	19%	13%	9%			
Honeymoon	5%	6%	6%	2%	4%	2%	3%	5%	5%			
Repeat	42%	37%	38%	47%	35%	24%	43%	47%	43%			
TOTAL	351	351	352	351	352	353	351	352	350			

SECTION 1
PROFILE OF RESPONDENTS

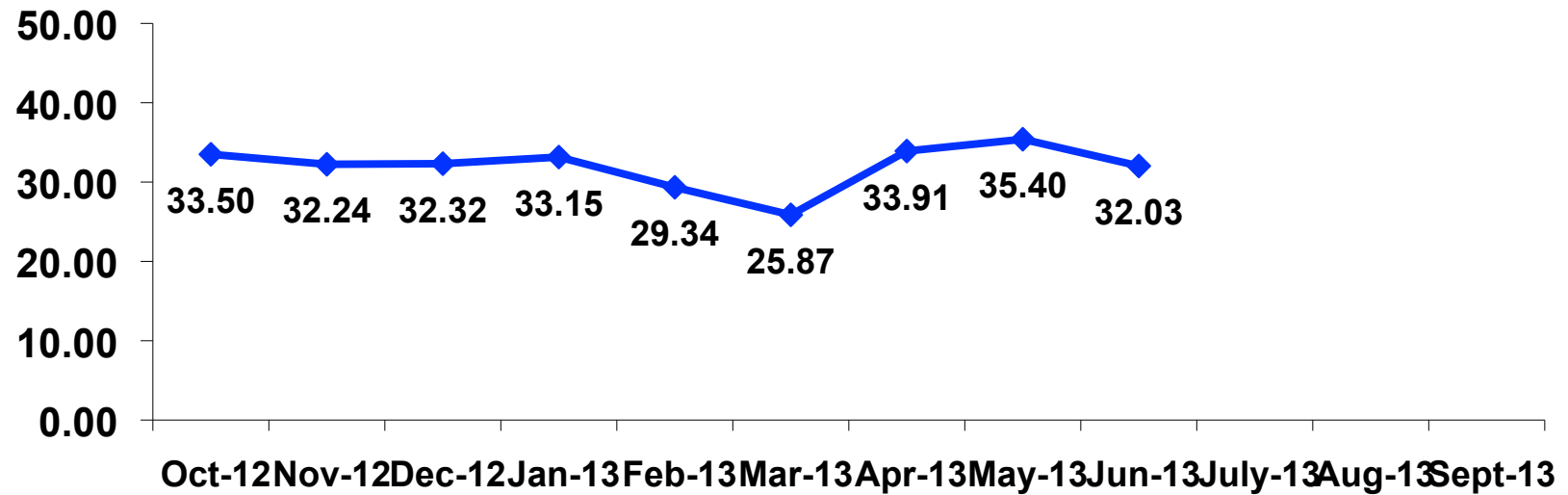
Marital Status Tracking



Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	40%	79%	6%	56%	100%	72%	26%	26%	74%	87%	100%	45%
	Single	60%	21%	94%	44%		28%	74%	74%	26%	13%		55%
	Total Count	349	131	34	9	9	25	129	257	77	30	17	152

Average Age Tracking



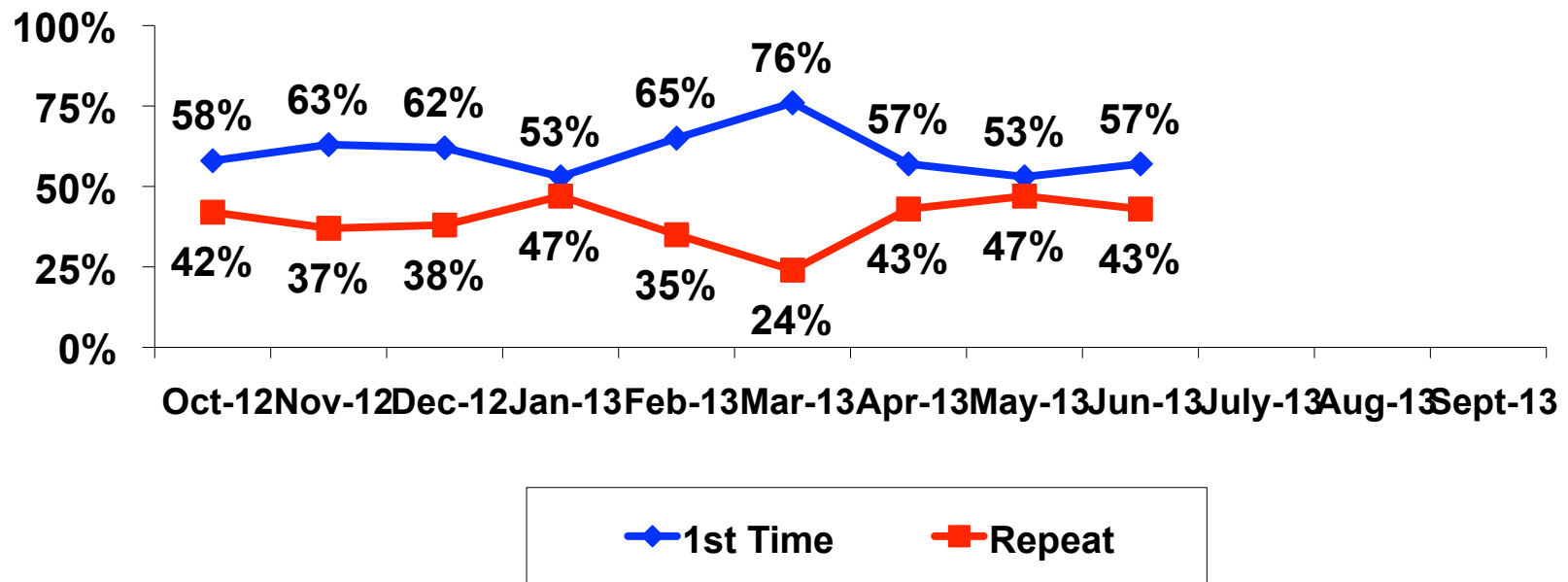
Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	26%	11%	24%	22%			34%	35%		6%	12%	15%
	25-34	45%	39%	53%	44%		60%	44%	61%		19%	76%	44%
	35-49	20%	31%	24%	11%		20%	16%	4%	74%	68%	12%	28%
	50+	10%	20%		22%	100%	20%	6%		26%	6%		13%
	Total Count	349	131	34	9	9	25	129	257	78	31	17	151
QF	Mean	32.03	37.40	30.03	36.22	63.67	37.84	29.64	26.88	43.69	38.61	29.65	35.00
	Median	30	35	29	30	63	34	27	26	42	40	29	32

Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	9%	3%	14%	14%	13%	5%	12%	11%	3%			6%
	Y2.0M-Y3.0M	18%	9%	25%	14%		10%	21%	20%	11%	10%	13%	14%
	Y3.0M-Y4.0M	14%	13%	18%	57%		10%	12%	15%	14%	3%	47%	10%
	Y4.0M-Y5.0M	14%	15%	18%			20%	9%	13%	21%	24%	13%	16%
	Y5.0M-Y7.0M	21%	29%	14%		38%	35%	20%	21%	20%	28%	20%	26%
	Y7.0M-Y10.0M	11%	14%		14%	13%	10%	11%	8%	18%	17%	7%	14%
	Y10.0M+	10%	16%	11%		38%	10%	10%	8%	13%	14%		13%
	No Income	3%	1%					5%	5%		3%		2%
	Total Count	300	118	28	7	8	20	116	217	71	29	15	132

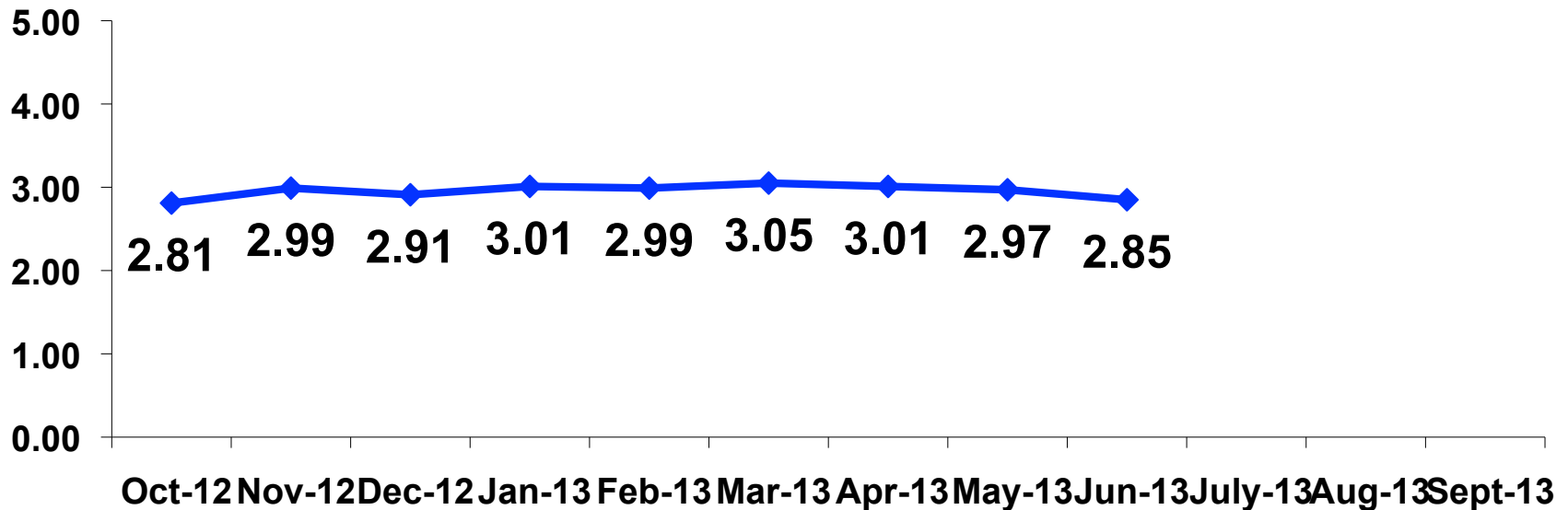
Prior Trips To Guam Tracking



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%	51%	50%	67%	44%	68%	58%	63%	38%	26%	100%	
	No	43%	49%	50%	33%	56%	32%	42%	37%	62%	74%		100%
	Total Count	350	132	34	9	9	25	129	257	78	31	17	152

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	2.85	2.95	2.71	3.00	2.67	3.08	2.68	2.84	2.91	2.90	3.59	2.80
	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	63%	57%	62%		44%	46%	64%	65%	58%	65%	53%	65%
	Full package tour	25%	34%	21%		33%	42%	24%	24%	28%	23%	47%	22%
	Company paid travel	5%		12%				5%	5%	6%			6%
	Individually arranged travel (FIT)	4%	5%	3%		11%	13%	5%	4%	5%	10%		5%
	Group tour	3%	4%	3%	100%	11%		2%	2%	3%	3%		2%
	Total Count	348	132	34	9	9	24	129	255	78	31	17	151

Travel Motivation Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
	-	-	-	-	-	-	-	-	-	-	-	-
Q5A Previous trip	32%	38%	32%	22%	33%	24%	33%	28%	45%	55%		73%
Price	34%	32%	44%		22%	4%	36%	36%	29%	26%	12%	31%
Visit friends/ Relatives	1%	2%				4%		1%	1%			1%
Recomm- friend/family/trvl agnt	19%	11%	24%	11%	11%	4%	23%	23%	10%	6%	12%	13%
Scuba	5%	5%	3%			4%	9%	4%	9%	3%		8%
Water sports	23%	16%	26%	11%		8%	37%	28%	12%	16%	12%	17%
Short travel time	47%	49%	47%	11%	33%	4%	43%	46%	49%	48%	41%	52%
Golf	2%	3%			11%	4%	5%	2%	1%	3%		3%
Relax	41%	39%	44%	22%	22%		46%	40%	44%	48%	12%	47%
Company/ Business Trip	10%	3%	18%	44%	11%		10%	10%	9%	3%		12%
Company Sponsored	1%	1%		33%			2%	1%	3%	3%		1%
Convention/ Trade/ Conference	1%	1%					1%		3%			1%
Safe	17%	23%	24%				18%	14%	26%	26%	12%	20%
Natural beauty	57%	55%	65%	44%	33%	12%	60%	59%	53%	71%	18%	55%
Shopping	33%	33%	56%	22%	33%	4%	30%	34%	29%	32%	24%	36%
Career Cert/ Testing	0%							0%				1%
Married/ Attn wedding	7%	12%			11%	100%	4%	6%	9%	6%	18%	5%
Honeymoon	5%	12%				12%	1%	6%	3%	3%	100%	
Pleasure	49%	45%	59%	11%	11%	8%	51%	51%	50%	58%	35%	52%
Organized sports	1%	1%					1%	0%	1%	3%		1%
Other	4%	5%		22%	33%		4%	3%	3%	3%		3%
Total Count	350	132	34	9	9	25	129	257	78	31	17	152

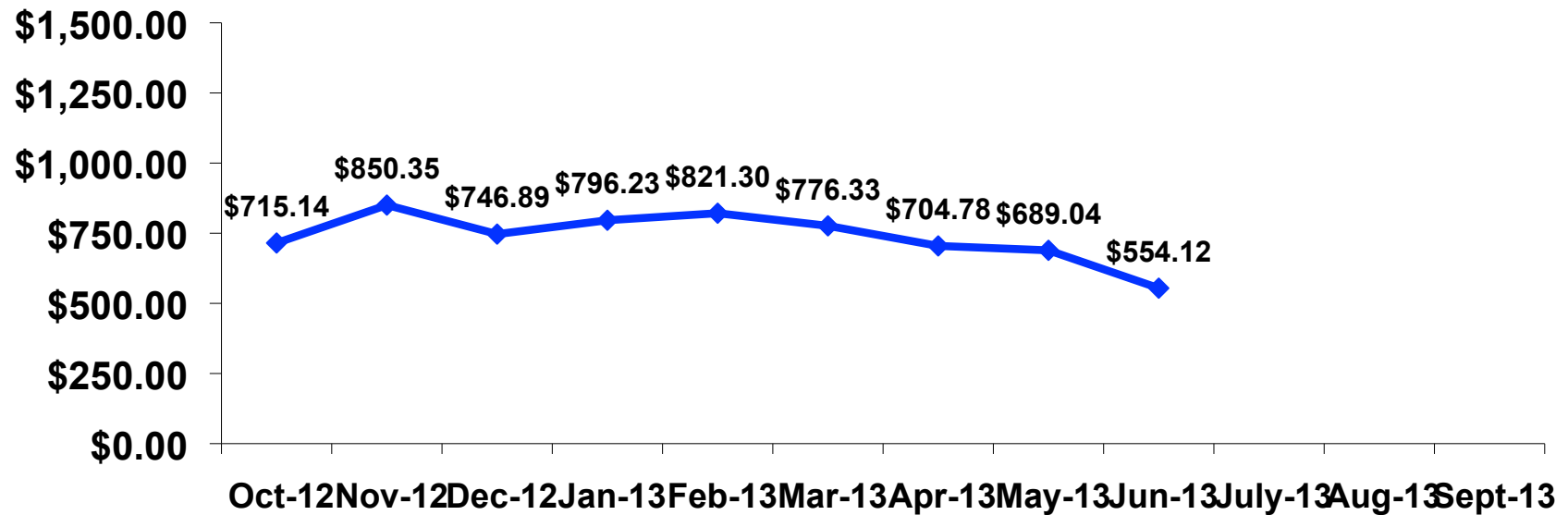
Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	77%	77%	88%	78%	78%	76%	85%	77%	78%	74%	71%	78%	
	Travel Guidebook- Bookstore	54%	51%	59%	67%	44%	48%	54%	56%	49%	48%	65%	49%	
	Travel Agent Brochure	46%	48%	44%	56%	33%	44%	45%	48%	42%	45%	65%	39%	
	Prior Trip	35%	39%	38%	22%	56%	32%	34%	31%	47%	61%		81%	
	Magazine (Consumer)	31%	33%	21%	56%	44%	44%	32%	33%	22%	32%	47%	26%	
	Friend/ Relative	31%	23%	29%	22%		24%	33%	37%	14%	19%	29%	21%	
	TV	10%	11%	3%	33%	22%	12%	9%	11%	5%	10%	12%	8%	
	Co-Worker/ Company Trvl Dept	3%	2%	6%	22%		4%	5%	4%				2%	
	Consumer Trvl Show	3%	2%				4%	6%	4%	1%		12%	1%	
	Travel Trade Show	1%	1%					2%	1%				1%	
	GVB Office	1%	2%					2%	1%	1%			2%	
	GVB Promo	1%	1%					2%	0%	1%			1%	
	Other	0%	1%							1%				
	Newspaper	0%	1%			11%	4%							
	Total	Count	350	132	34	9	9	25	129	257	78	31	17	152

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

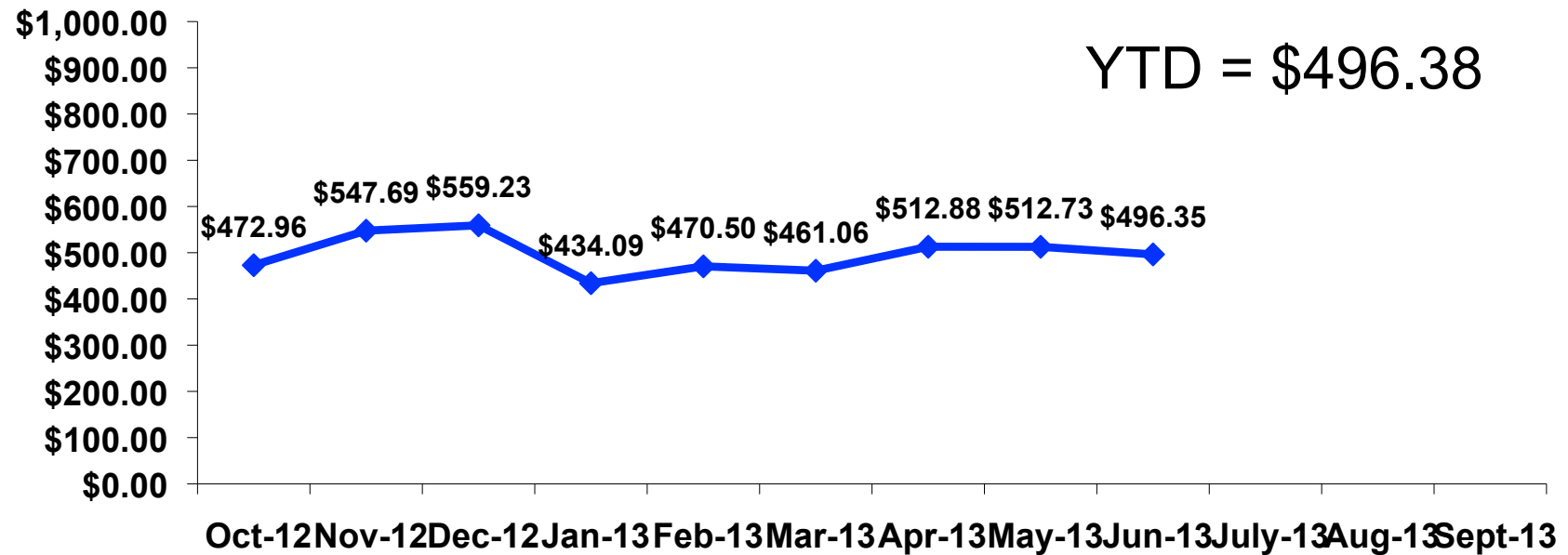
YTD=\$739.42



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	\$554.12	\$632.73	\$427.67	\$146.09	\$610.99	\$1,010.80	\$542.90	\$560.65	\$536.15	\$544.12	\$1,080.50	\$484.27
	Median	\$520	\$520	\$520	\$0	\$520	\$535	\$520	\$520	\$520	\$572	\$780	\$495
	Minimum	\$0	\$0	\$0	\$0	\$187	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$6,236	\$5,197	\$935	\$468	\$1,039	\$6,236	\$6,236	\$6,236	\$2,079	\$1,386	\$5,197	\$1,559

On-Island Expenditures Tracking



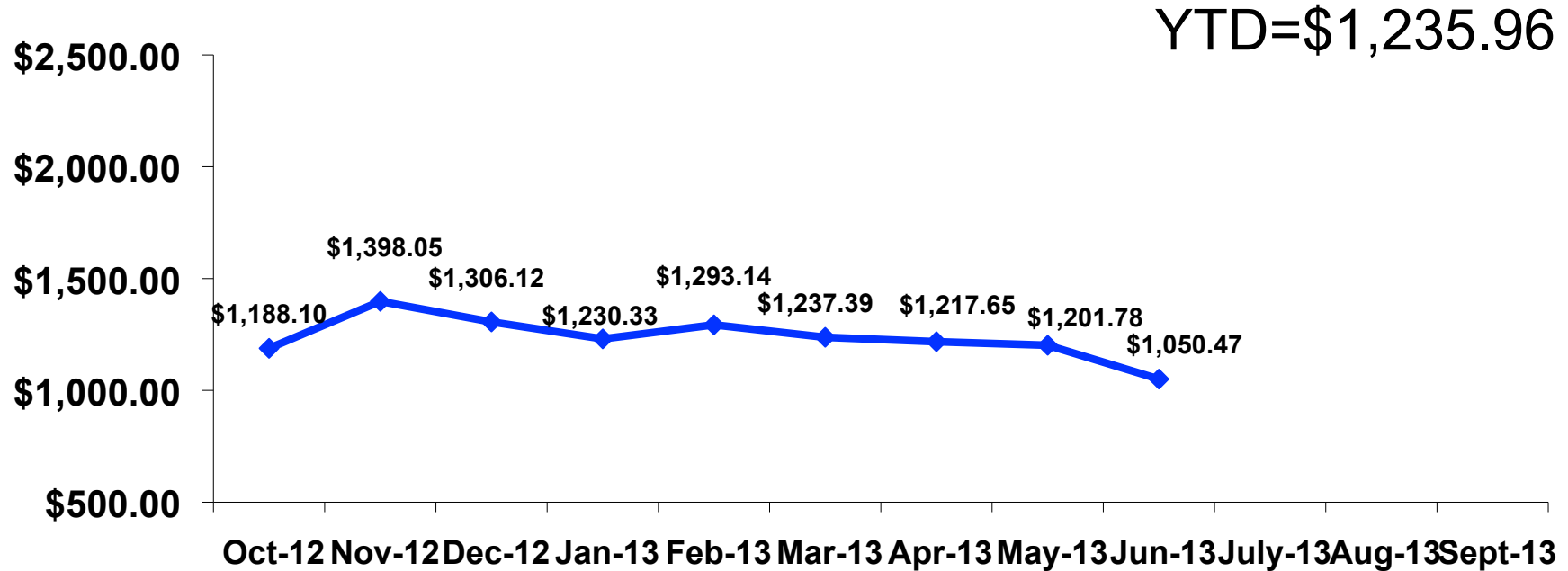
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$496.35	\$404.14	\$533.18	\$409.56	\$401.67	\$495.87	\$459.96	\$477.04	\$595.10	\$310.13	\$547.06	\$506.92
	Median	\$400	\$359	\$400	\$426	\$350	\$333	\$400	\$400	\$388	\$283	\$500	\$400
	Minimum	\$0	\$0	\$20	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$4,000	\$2,000	\$1,720	\$800	\$1,250	\$3,450	\$1,700	\$3,817	\$4,000	\$1,417	\$2,000	\$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	\$28.93	\$51.84	\$10.44	\$48.89	\$53.44	\$36.67	\$20.81	\$23.81	\$42.17	\$89.03	\$87.50	\$34.60
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$32.89	\$36.02	\$19.03	\$18.11	\$43.78	\$12.29	\$27.68	\$31.56	\$36.73	\$47.74	\$17.81	\$36.55
	Median	\$10	\$20	\$4	\$10	\$14	\$0	\$9	\$10	\$19	\$30	\$5	\$16
F&B RESTRNT	Mean	\$71.77	\$88.34	\$30.74	\$11.22	\$35.11	\$118.54	\$67.33	\$59.25	\$122.63	\$156.13	\$43.75	\$86.05
	Median	\$20	\$30	\$0	\$0	\$0	\$0	\$25	\$20	\$56	\$100	\$0	\$40
OPT TOUR	Mean	\$91.64	\$93.05	\$48.97	\$81.11	\$199.22	\$148.33	\$129.84	\$95.46	\$73.72	\$52.74	\$86.88	\$97.83
	Median	\$0	\$0	\$0	\$85	\$43	\$0	\$55	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$177.49	\$212.71	\$181.32	\$100.00	\$266.67	\$256.00	\$118.64	\$143.24	\$291.99	\$255.16	\$163.75	\$235.07
	Median	\$50	\$100	\$13	\$100	\$0	\$72	\$50	\$50	\$100	\$100	\$75	\$100
GIFT- OTHER	Mean	\$114.65	\$137.39	\$115.44	\$185.56	\$153.89	\$186.46	\$110.93	\$114.66	\$116.60	\$102.42	\$246.56	\$108.55
	Median	\$65	\$100	\$38	\$100	\$5	\$100	\$90	\$68	\$85	\$100	\$225	\$53
TRANS	Mean	\$21.12	\$17.13	\$8.53	\$3.33	\$20.44	\$9.00	\$14.53	\$15.82	\$39.24	\$23.55	\$22.50	\$17.66
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$175.82	\$265.11	\$189.29	\$205.78	\$180.78	\$122.29	\$117.64	\$147.76	\$270.12	\$256.77	\$493.75	\$188.26
	Median	\$0	\$0	\$0	\$0	\$4	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$710.00	\$886.74	\$603.76	\$642.89	\$958.89	\$854.00	\$600.38	\$625.45	\$994.38	\$951.29	\$1,094.12	\$805.52
	Median	\$500	\$715	\$400	\$426	\$370	\$413	\$430	\$500	\$700	\$700	\$1,000	\$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	\$1,050.47	\$1,036.86	\$960.85	\$555.65	\$1,012.66	\$1,506.67	\$1,002.86	\$1,037.68	\$1,131.25	\$854.25	\$1,627.56	\$991.20
	Median	\$924	\$916	\$911	\$468	\$780	\$957	\$942	\$930	\$931	\$816	\$1,280	\$922
	Minimum	\$0	\$0	\$200	\$260	\$468	\$0	\$0	\$0	\$0	\$0	\$150	\$0
	Maximum	\$6,573	\$6,047	\$2,228	\$1,005	\$1,914	\$6,573	\$6,573	\$6,573	\$4,447	\$2,803	\$6,047	\$4,020

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 2013, and Overall Oct-2012 - Jun 2013										
	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Combined Oct-2012 - Jun 2013
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	5	3					1			4
Ease of getting around	3				3		5			9
Safety walking around at night			4							
Quality of daytime tours								3		6
Variety of daytime tours					4					
Quality of nighttime tours										
Variety of nighttime tours										
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	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	2	1	3	1	3	1
Quality of ground handler			3			4				7
Quality/cleanliness of transportation vehicles	2				5		2	2	1	5
% 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%	43.9%

NOTE: Only significant drivers are included.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by four significant factors in the June 2013 Period. By rank order they are:
 - **Quality/cleanliness of transportation vehicles,**
 - **Price of things on Guam,**
 - **Quality of landscape in Guam, and**
 - **Quality of hotel accommodations.**
- With all four factors the overall r^2 is .38 meaning that **38.0% 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 2013 and Overall Oct-2012-Jun 2013										
	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Combined Oct-2012-Jun 2013
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks								3		4
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						3
Quality of shopping			3	4						1
Variety of shopping										
Price of things on Guam							1			
Quality of hotel accommodations										
Quality/cleanliness of air, sky										
Quality/cleanliness of parks										
Quality of landscape in Tumon										
Quality of landscape in Guam								2		
Quality of ground handler			2					1		
Quality/cleanliness of transportation vehicles										2
% 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%	1.9%

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 no significant factors in the June 2013 Period.