



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013 Market Segmentation

MARCH 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 **353** 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 **353** 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

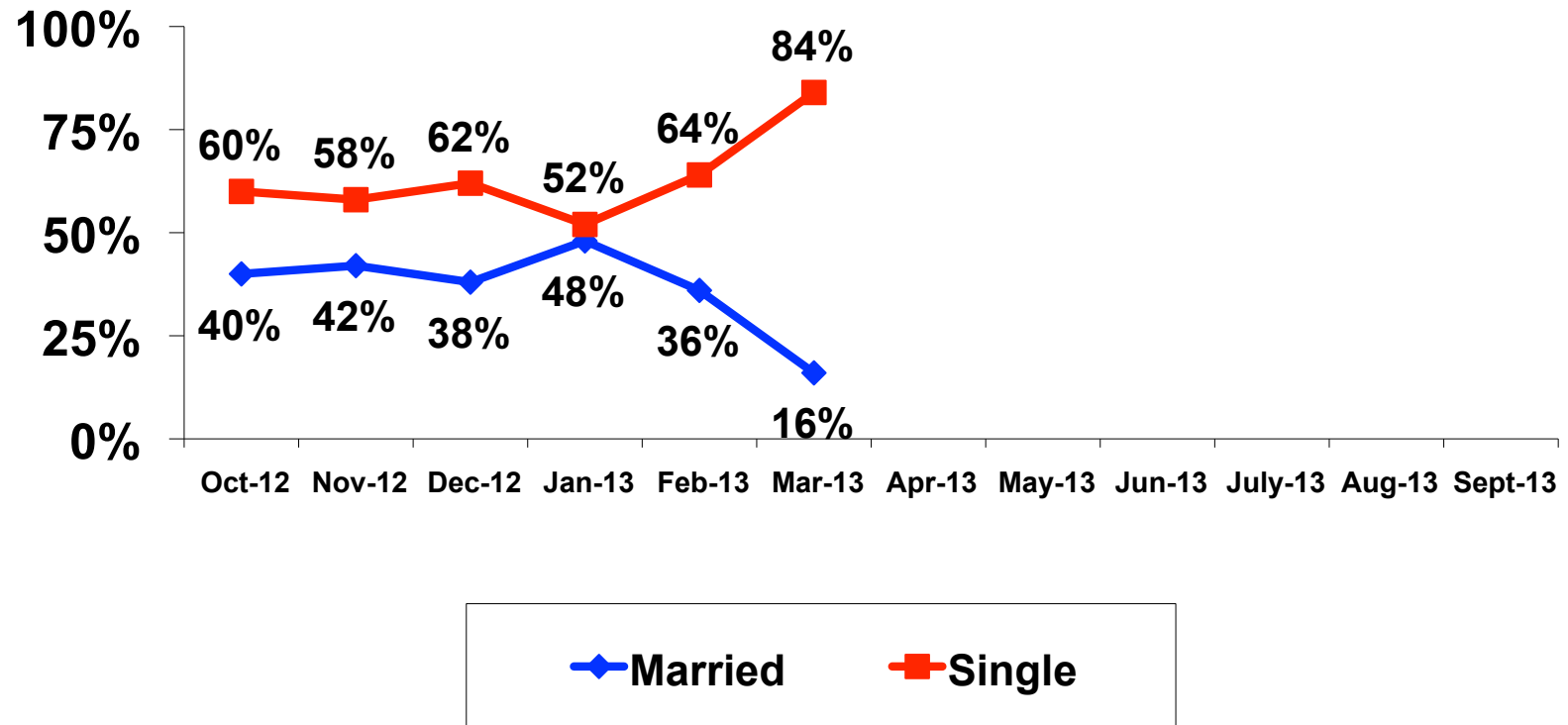
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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

SECTION 1
PROFILE OF RESPONDENTS

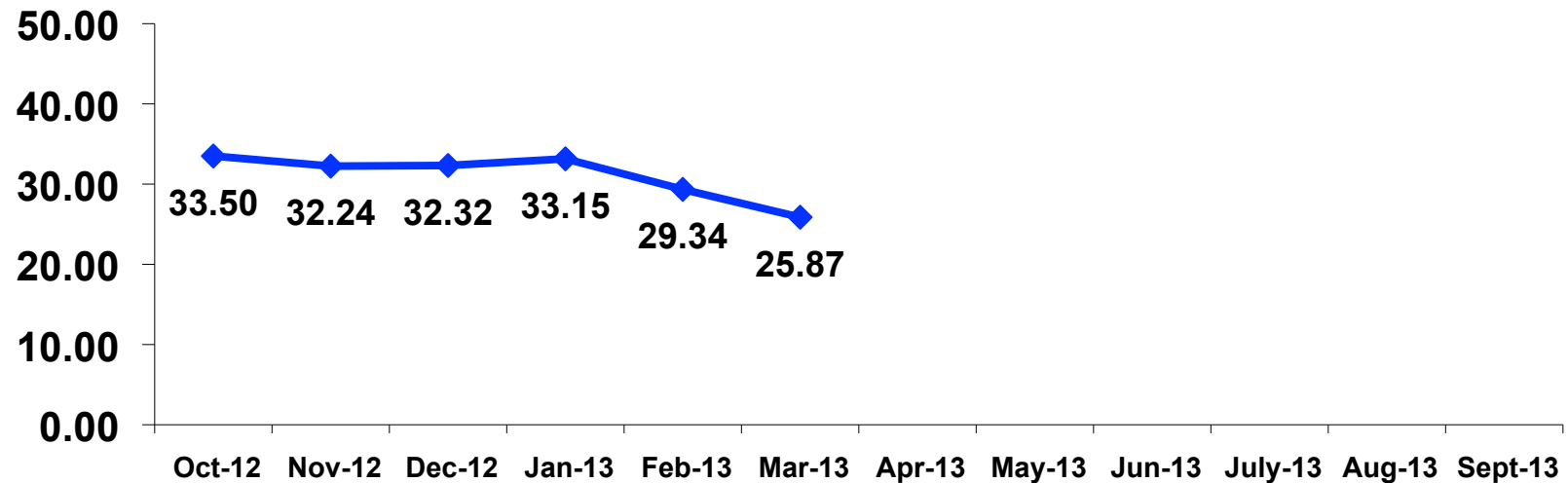
Marital Status Tracking



Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	16%	69%	31%	7%	100%	63%	11%	6%	74%	85%	75%	33%
	Single	84%	31%	69%	93%		38%	89%	94%	26%	15%	25%	67%
	Total Count	351	67	13	30	4	16	148	300	38	20	8	82

Average Age Tracking



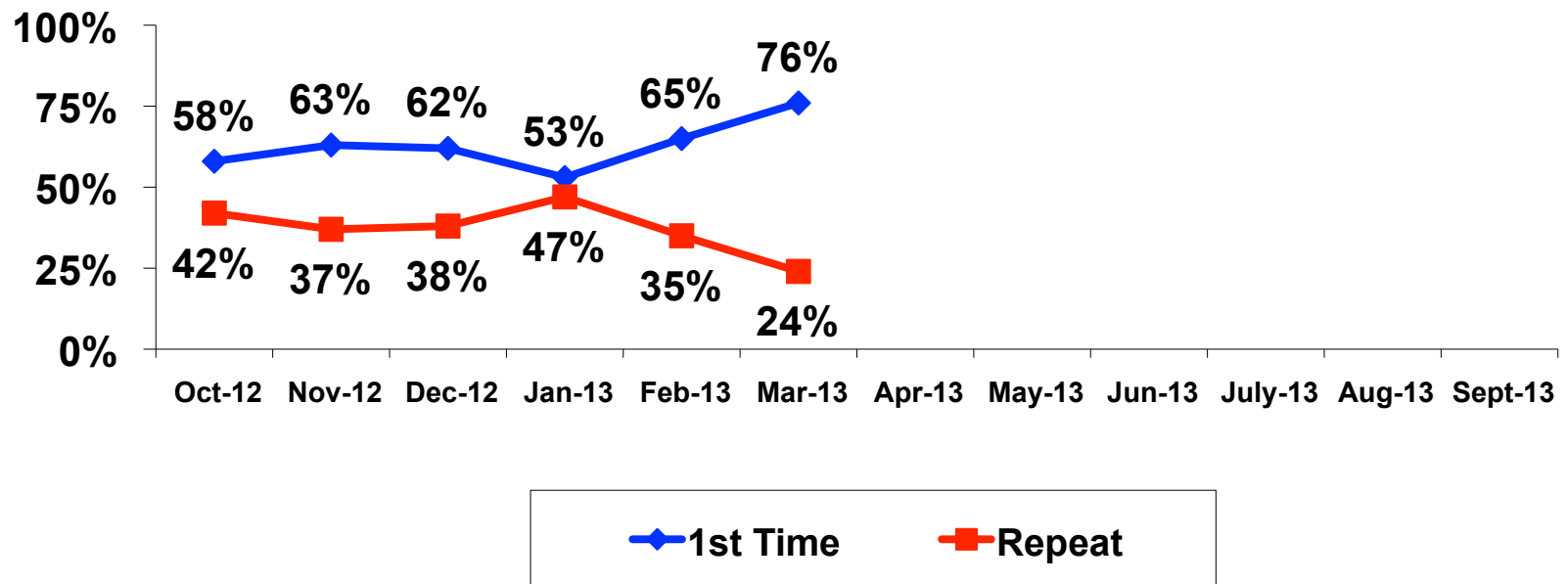
Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	73%	21%	31%	77%		25%	84%	85%			25%	40%
	25-34	13%	22%	38%	20%		44%	9%	15%		10%	63%	27%
	35-49	10%	35%	15%	3%		13%	6%	0%	87%	71%		22%
	50+	5%	22%	15%		100%	19%	1%		13%	19%	13%	12%
	Total Count	351	68	13	30	4	16	148	301	38	21	8	83
QF	Mean	25.87	38.40	32.23	23.20	64.00	33.94	23.86	22.30	43.45	43.24	31.13	32.27
	Median	22	39	26	22	63	30	22	22	43	43	28	27

Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q26	<Y2.0 million	13%	8%				7%	13%	15%	3%	5%		8%	
	Y2.0M-Y3.0M	6%	5%		19%		13%	4%	6%	6%			6%	
	Y3.0M-Y4.0M	6%	2%	36%	5%			7%	6%	6%		14%	2%	
	Y4.0M-Y5.0M	10%	11%		14%		27%	11%	11%	9%	5%	43%	12%	
	Y5.0M-Y7.0M	19%	19%	36%	19%	25%	27%	17%	19%	20%	26%		23%	
	Y7.0M-Y10.0M	20%	27%	18%	10%		7%	22%	16%	40%	42%	14%	17%	
	Y10.0M+	14%	24%	9%	29%	50%	20%	13%	13%	17%	21%	29%	24%	
	No Income	12%	3%		5%	25%		14%	14%				9%	
	Total	Count	269	62	11	21	4	15	111	222	35	19	7	66

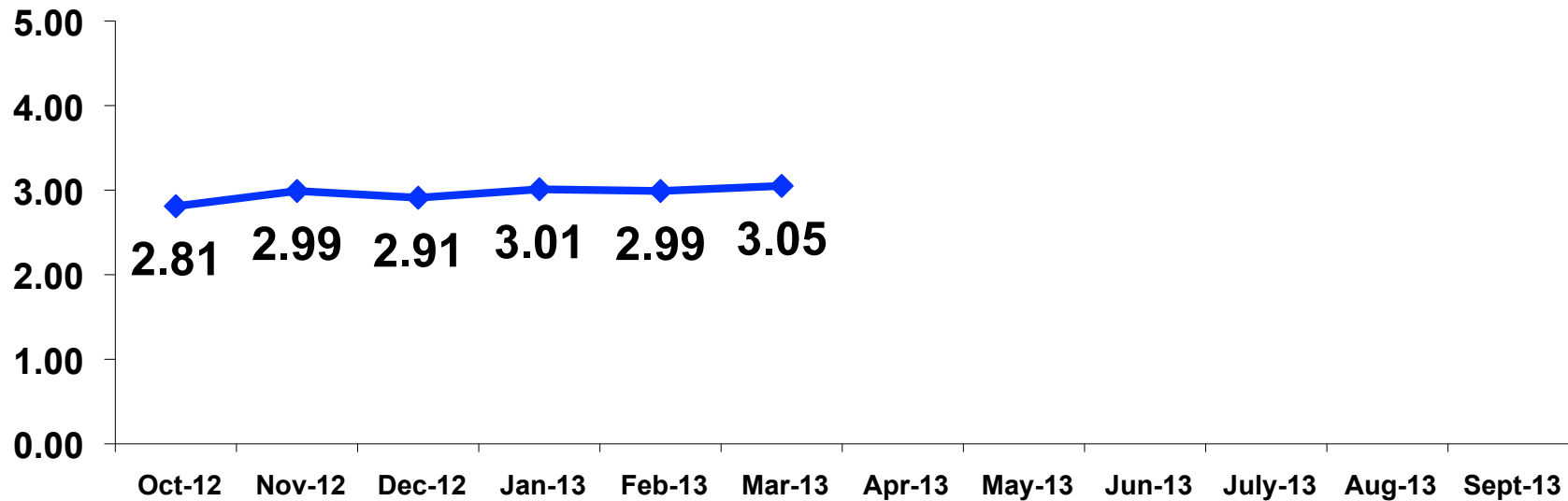
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	76%	51%	54%	77%		69%	80%	81%	53%	43%	63%	
	No	24%	49%	46%	23%	100%	31%	20%	19%	47%	57%	38%	100%
	Total Count	353	68	13	30	4	16	148	301	38	21	8	83

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	3.05	3.44	3.00	2.97	3.25	3.31	3.22	3.02	3.32	3.52	3.50	3.19
	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	55%	48%	62%		50%	44%	59%	56%	49%	40%	25%	50%	
	Full package tour	31%	39%	31%		50%	38%	30%	29%	38%	40%	75%	28%	
	Group tour	9%			100%		13%	7%	10%				9%	
	Individually arranged travel (FIT)	5%	12%	8%				4%	4%	14%	20%		12%	
	Other	1%	1%				6%	1%	1%					
	Company paid travel	0%							0%				1%	
	Total	Count	351	67	13	30	4	16	147	300	37	20	8	82

Travel Motivation Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	18%	43%	38%	21%	75%	31%	13%	13%	42%	48%	38%	76%	
	Price	25%	21%	8%	10%			30%	26%	16%	29%	13%	16%	
	Visit friends/ Relatives	3%	3%	8%	7%		6%	2%	3%		5%		1%	
	Recomm- friend/family/trvl agnt	33%	15%	23%	28%		6%	36%	36%	18%	14%	25%	19%	
	Scuba	4%	3%		3%			9%	5%			13%	4%	
	Water sports	23%	16%	15%	17%	25%		34%	24%	13%	24%	25%	19%	
	Short travel time	44%	63%	77%	31%	75%	13%	42%	40%	71%	81%	50%	51%	
	Golf	1%	1%			25%		1%		5%			4%	
	Relax	27%	41%	46%	10%	50%	13%	24%	23%	50%	57%	13%	35%	
	Company/ Business Trip	3%			28%			3%	4%				7%	
	Company Sponsored	1%						1%	0%	3%				
	Safe	22%	28%	8%	3%	25%	13%	25%	20%	29%	33%	25%	22%	
	Natural beauty	59%	57%	77%	41%	75%	13%	65%	59%	58%	71%	38%	55%	
	Shopping	38%	32%	54%	21%	75%	13%	30%	39%	29%	38%	38%	36%	
	Career Cert/ Testing	0%	1%							3%	5%			
	Married/ Attn wedding	5%	21%		7%		100%	1%	4%	5%		25%	6%	
	Honeymoon	2%	9%			25%	13%	3%	2%		5%	100%	4%	
	Pleasure	52%	46%	77%	38%	75%	6%	51%	51%	53%	57%	50%	46%	
	Organized sports	1%						1%	1%	3%			2%	
	Other	8%			10%			7%	9%	3%			4%	
	Total	Count	352	68	13	29	4	16	148	300	38	21	8	83

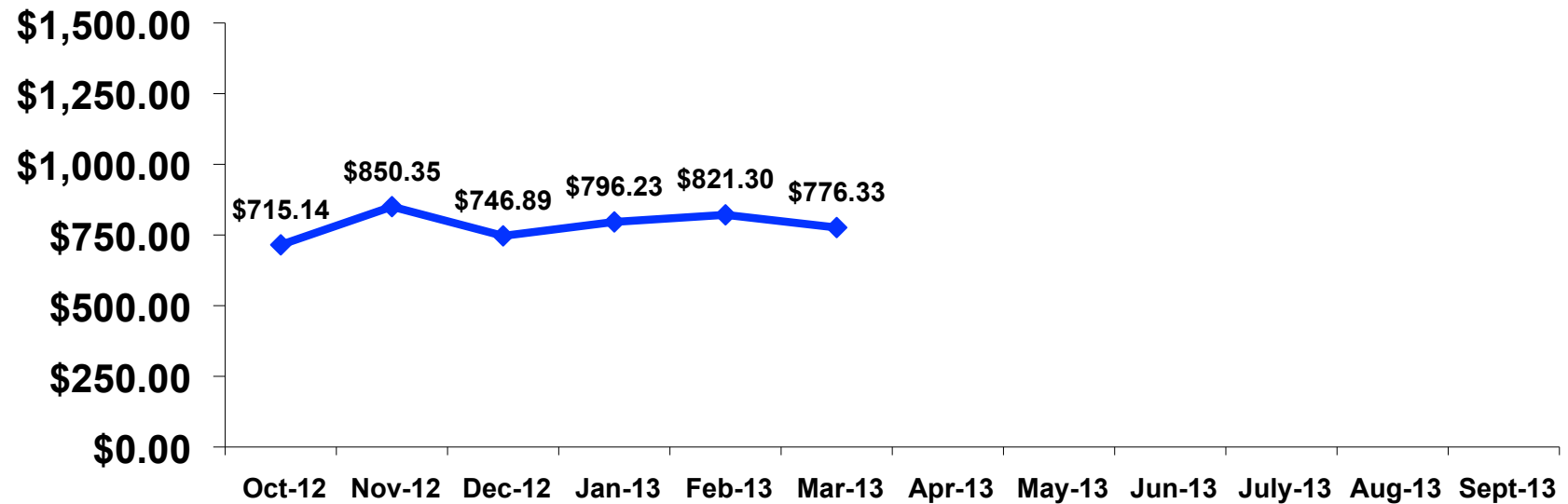
Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q1	Internet	79%	70%	100%	73%	75%	33%	79%	80%	82%	71%	75%	73%
	Travel Guidebook- Bookstore	54%	51%	69%	50%	25%	53%	55%	54%	55%	67%	50%	51%
	Travel Agent Brochure	54%	52%	69%	30%	75%	47%	59%	55%	42%	38%	38%	35%
	Magazine (Consumer)	46%	37%	46%	37%		20%	51%	47%	50%	52%	25%	43%
	Friend/ Relative	44%	31%	31%	43%	25%	40%	47%	47%	26%	33%	25%	33%
	Prior Trip	21%	43%	38%	23%	100%	33%	17%	17%	37%	43%	38%	88%
	TV	20%	19%	31%	33%	25%		22%	21%	18%	29%		19%
	Consumer Trvl Show	7%	4%	15%	10%			8%	7%	3%	10%		7%
	Co-Worker/ Company Trvl Dept	1%			7%			1%	1%	3%			1%
	Newspaper	1%	1%		3%			2%	1%				4%
	Travel Trade Show	0%							0%				
	GVB Office	0%	1%							3%	5%		
	Total Count	352	67	13	30	4	15	148	300	38	21	8	83

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

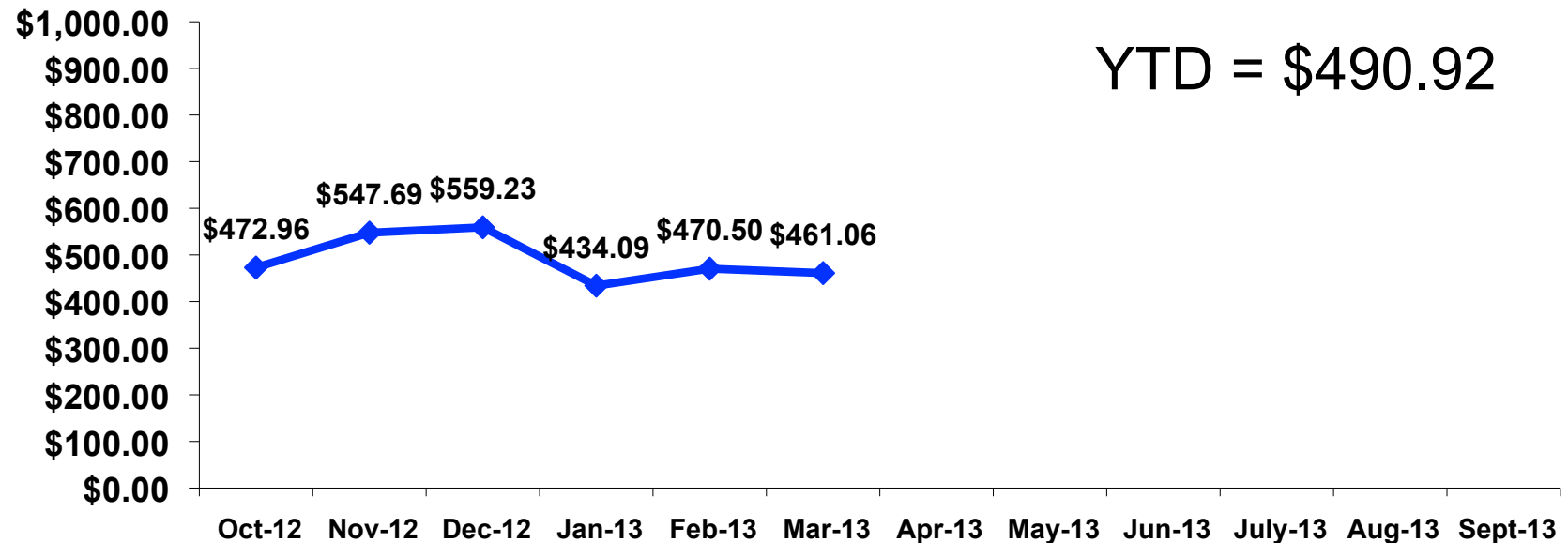
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Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$776.33	\$972.45	\$805.45	\$701.39	\$1,277.69	\$1,494.54	\$751.88	\$761.01	\$855.71	\$629.34	\$1,273.71	\$811.88
	Median	\$739	\$845	\$739	\$739	\$1,236	\$1,109	\$739	\$739	\$858	\$686	\$1,021	\$686
	Minimum	\$0	\$0	\$0	\$0	\$1,056	\$0	\$0	\$0	\$0	\$0	\$598	\$0
	Maximum	\$10,557	\$10,557	\$1,584	\$1,372	\$1,584	\$10,557	\$3,167	\$10,557	\$1,689	\$1,056	\$3,167	\$10,557

On-Island Expenditures Tracking



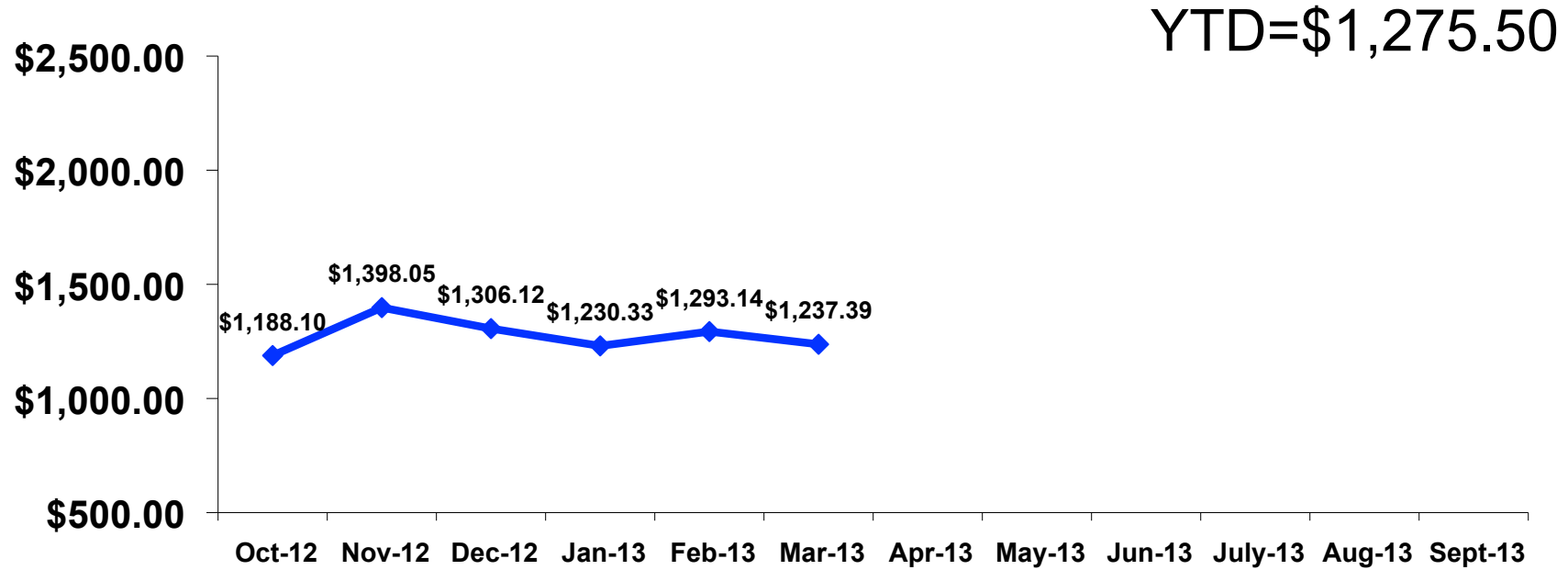
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$461.06	\$512.17	\$497.51	\$425.17	\$892.42	\$414.90	\$477.72	\$433.41	\$668.95	\$541.26	\$756.25	\$596.30
	Median	\$400	\$388	\$524	\$300	\$543	\$233	\$400	\$400	\$490	\$333	\$450	\$500
	Minimum	\$0	\$0	\$222	\$0	\$233	\$0	\$0	\$0	\$0	\$100	\$0	\$36
	Maximum	\$3,000	\$3,000	\$755	\$1,500	\$2,250	\$2,290	\$2,255	\$2,255	\$3,000	\$3,000	\$2,250	\$3,000

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	\$24.15	\$72.29	\$43.08	\$15.20	\$222.50	\$88.13	\$21.41	\$17.77	\$56.68	\$61.86	\$25.00	\$56.02
	Median	\$0	\$0	\$0	\$0	\$245	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.90	\$63.47	\$57.08	\$21.07	\$252.50	\$4.44	\$29.21	\$23.60	\$79.21	\$101.43	\$98.13	\$53.75
	Median	\$10	\$10	\$15	\$10	\$135	\$0	\$13	\$7	\$45	\$50	\$8	\$20
F&B RESTRNT	Mean	\$69.97	\$139.04	\$121.54	\$33.03	\$270.00	\$115.63	\$75.49	\$55.84	\$160.95	\$142.19	\$201.25	\$94.77
	Median	\$10	\$57	\$35	\$0	\$140	\$0	\$15	\$0	\$100	\$100	\$155	\$50
OPT TOUR	Mean	\$61.02	\$96.15	\$4.23	\$40.30	\$100.00	\$8.75	\$78.23	\$49.98	\$149.34	\$166.67	\$36.25	\$73.76
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$146.09	\$342.19	\$141.15	\$72.90	\$725.00	\$179.00	\$98.20	\$101.35	\$453.03	\$541.43	\$225.00	\$300.95
	Median	\$28	\$75	\$100	\$0	\$50	\$40	\$30	\$28	\$100	\$50	\$100	\$60
GIFT- OTHER	Mean	\$96.84	\$132.29	\$137.69	\$76.70	\$255.00	\$43.75	\$105.36	\$77.25	\$241.13	\$162.86	\$56.25	\$118.20
	Median	\$50	\$50	\$100	\$50	\$100	\$0	\$50	\$40	\$150	\$70	\$0	\$50
TRANS	Mean	\$9.93	\$29.69	\$20.23	\$3.67	\$0.00	\$11.25	\$10.17	\$6.85	\$36.39	\$52.52	\$6.25	\$17.82
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$202.58	\$318.18	\$138.46	\$172.30	\$1,000.00	\$287.50	\$173.39	\$188.94	\$219.89	\$399.52	\$876.88	\$280.11
	Median	\$0	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$0	\$0	\$48	\$0
TOTAL	Mean	\$639.18	\$1,193.31	\$663.46	\$435.17	\$2,825.00	\$738.44	\$591.40	\$517.89	\$1,396.42	\$1,628.48	\$1,525.00	\$998.64
	Median	\$499	\$850	\$600	\$300	\$2,900	\$400	\$500	\$400	\$1,000	\$1,000	\$1,000	\$700

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	\$1,237.39	\$1,484.62	\$1,302.96	\$1,126.56	\$2,170.11	\$1,909.43	\$1,229.60	\$1,194.42	\$1,524.66	\$1,170.60	\$2,029.96	\$1,408.18
	Median	\$1,139	\$1,294	\$1,289	\$1,112	\$1,779	\$1,369	\$1,163	\$1,133	\$1,432	\$1,086	\$1,513	\$1,252
	Minimum	\$0	\$0	\$500	\$0	\$1,289	\$0	\$0	\$0	\$0	\$150	\$739	\$83
	Maximum	\$11,057	\$11,057	\$2,084	\$2,007	\$3,834	\$11,057	\$4,667	\$11,057	\$3,874	\$3,422	\$4,667	\$11,057

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 2013, and Overall Oct-2012 - Mar 2013							
Drivers:	Oct-12 rank	Nov-12 rank	Dec-12 rank	Jan-13 rank	Feb-13 rank	Mar-13 rank	Combined Oct-2012 - Mar 2013 rank
Quality & Cleanliness of beaches & parks	5	3					6
Ease of getting around	3				3		9
Safety walking around at night			4				7
Quality of daytime tours							5
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				
Quality of hotel accommodations		2		2		3	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	1
Quality of ground handler			3			4	4
Quality/cleanliness of transportation vehicles	2				5		
% of Per Person On Island Expenditures Accounted For	54.7%	50.6%	45.2%	42.4%	41.5%	40.1%	45.2%

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 March 2013 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Quality of shopping,**
 - **Quality of hotel accommodations, and**
 - **Quality of ground handler.**
- With all four factors the overall r^2 is .401 meaning that **40.1% of overall satisfaction is accounted for by these four factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2012, Jan, Feb, Mar 2013 and Overall Oct-2012-Mar 2013							
	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Combined Oct-2012-Feb 2013
Drivers:	rank	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%	0.0%	0.0%	0.9%

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 March 2013 Period.