



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013 Market Segmentation

MAY 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.

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

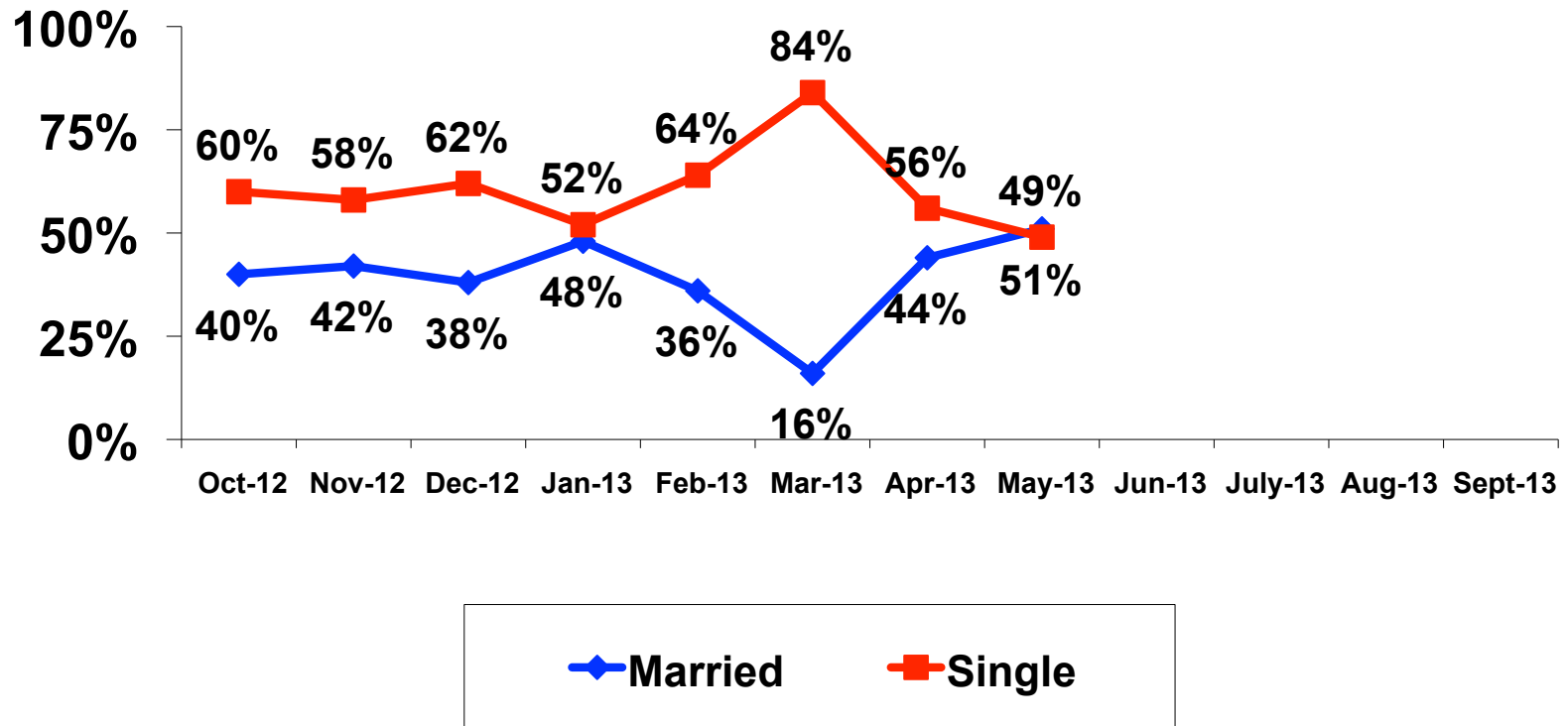
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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

SECTION 1
PROFILE OF RESPONDENTS

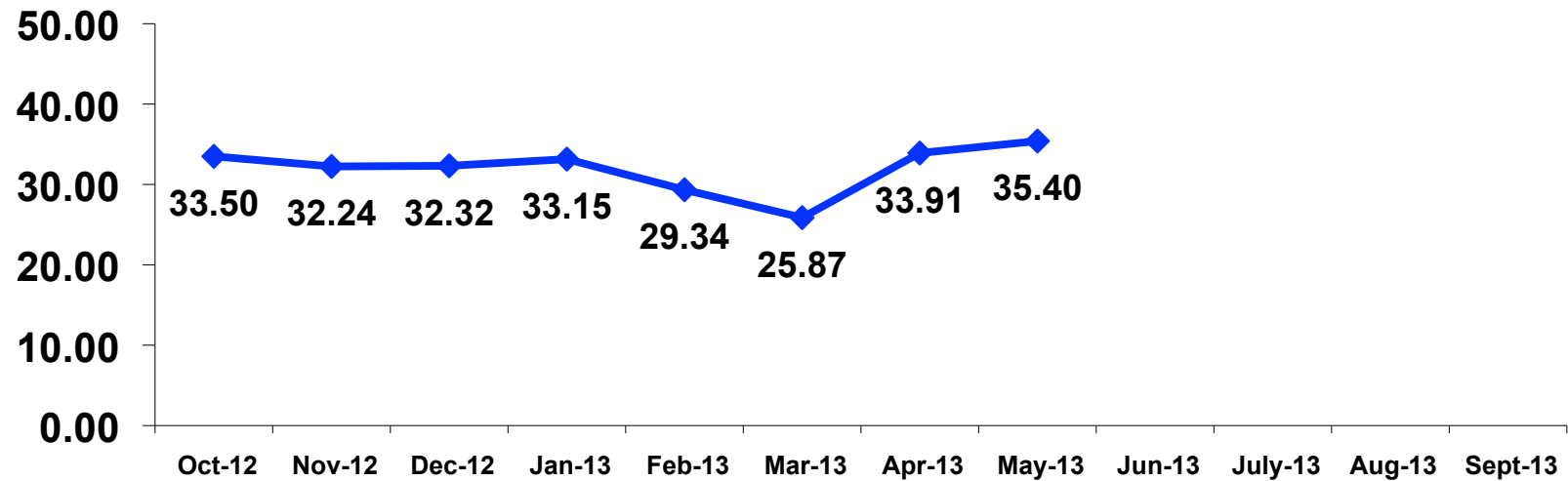
Marital Status Tracking



Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	51%	88%	26%	54%	96%	88%	49%	29%	81%	89%	100%	59%
	Single	49%	13%	74%	46%	4%	12%	51%	71%	19%	11%		41%
	Total Count	352	184	34	13	23	26	125	209	106	45	17	165

Average Age Tracking



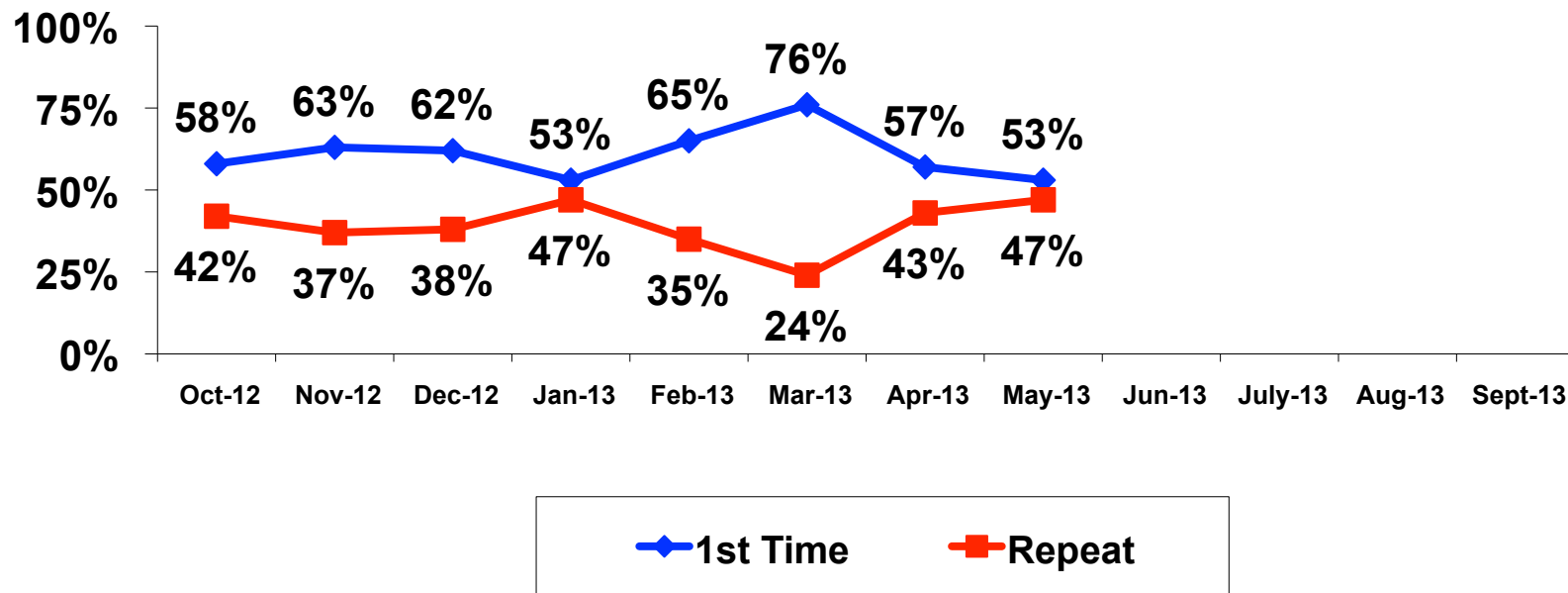
Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	18%	5%	36%	8%		4%	23%	31%			24%	9%
	25-34	38%	27%	55%	31%		35%	35%	64%		20%	65%	34%
	35-49	29%	45%	6%	46%		15%	31%	6%	86%	61%	12%	42%
	50+	14%	23%	3%	15%	100%	46%	11%		14%	18%		15%
	Total Count	350	183	33	13	23	26	124	209	106	44	17	164
QF	Mean	35.40	40.96	28.03	41.15	64.13	44.31	33.90	27.08	43.08	41.32	27.71	38.23
	Median	32	39	26	43	64	47	31	27	43	40	26	37

Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	4%	2%	3%	8%	9%	4%	6%	5%	2%			3%
	Y2.0M-Y3.0M	8%	3%	17%	8%	4%		6%	12%	3%	5%	12%	4%
	Y3.0M-Y4.0M	15%	12%	31%	8%	17%	15%	12%	18%	10%	19%	18%	13%
	Y4.0M-Y5.0M	18%	17%	14%	33%	17%	23%	18%	22%	14%	12%	24%	17%
	Y5.0M-Y7.0M	23%	26%	7%	17%	26%	42%	20%	24%	20%	16%	41%	22%
	Y7.0M-Y10.0M	15%	19%	21%	17%	17%	12%	14%	10%	24%	19%		18%
	Y10.0M+	15%	19%	7%	8%	9%	4%	19%	8%	27%	28%	6%	23%
	No Income	2%	1%					4%	2%		2%		1%
	Total Count	311	172	29	12	23	26	113	174	100	43	17	151

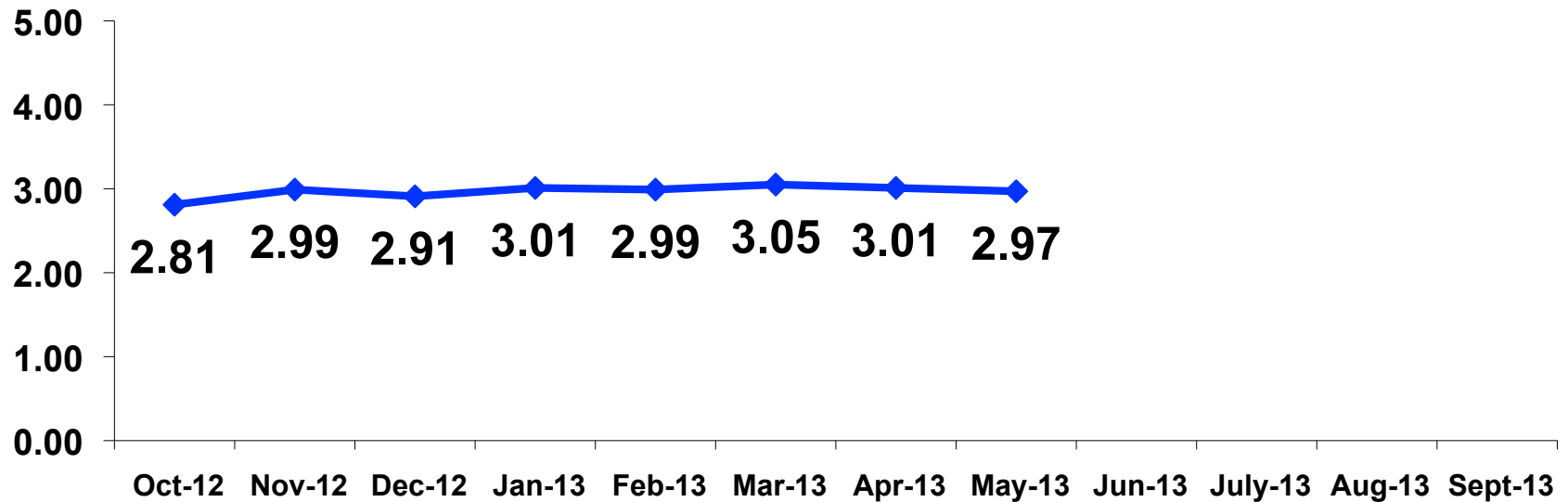
Prior Trips to Guam Tracking



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%	45%	56%	54%	52%	65%	61%	64%	32%	36%	76%	
	No	47%	55%	44%	46%	48%	35%	39%	36%	68%	64%	24%	100%
	Total Count	352	184	34	13	23	26	125	209	106	45	17	165

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	2.97	3.15	2.68	2.46	3.30	3.04	3.12	2.88	3.06	3.38	3.35	3.07
	Median	3	3	3	2	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	55%	50%	59%		48%	38%	55%	60%	50%	34%	53%	54%	
	Full package tour	26%	30%	26%		26%	50%	29%	29%	20%	32%	41%	21%	
	Individually arranged travel (FIT)	12%	16%	9%		17%	8%	10%	5%	24%	30%	6%	20%	
	Group tour	4%	3%	3%	100%	4%	4%	2%	2%	6%	2%		4%	
	Company paid travel	2%	1%	3%				3%	3%	1%			1%	
	Other	1%	1%			4%			0%		2%		1%	
	Total	Count	351	183	34	13	23	26	125	209	105	44	17	165

Travel Motivation Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	35%	42%	29%	38%	30%	23%	28%	26%	54%	60%	18%	75%
	Price	28%	26%	26%		30%	4%	31%	32%	21%	24%	12%	27%
	Visit friends/ Relatives	1%						2%	0%	1%			1%
	Recomm- friend/family/trvl agnt	18%	13%	15%	23%	26%	4%	18%	22%	11%	4%	6%	12%
	Scuba	6%	7%		8%	4%		14%	5%	8%	7%		7%
	Water sports	16%	15%	24%		4%		29%	18%	14%	16%	12%	14%
	Short travel time	55%	58%	50%	23%	39%	19%	57%	53%	59%	58%	59%	62%
	Golf	5%	7%	3%		17%		11%	2%	7%	2%		5%
	Relax	38%	34%	32%	15%	26%		44%	37%	42%	31%	18%	41%
	Company/ Business Trip	6%	2%	12%	46%	9%		6%	8%	3%			4%
	Company Sponsored	1%	2%		8%			1%		3%			2%
	Safe	22%	26%	21%	31%	30%	12%	21%	17%	27%	36%	6%	25%
	Natural beauty	57%	57%	56%	38%	48%	31%	55%	57%	60%	69%	41%	56%
	Shopping	34%	28%	50%	15%	30%	8%	32%	38%	25%	31%	35%	36%
	Career Cert/ Testing	0%						1%		1%			
	Married/ Attn wedding	7%	13%	9%	8%	22%	100%	2%	5%	8%	9%	24%	5%
	Honeymoon	5%	9%	3%			15%	6%	7%	2%	4%	100%	2%
	Pleasure	49%	48%	47%	23%	52%	19%	49%	48%	53%	47%	29%	50%
	Organized sports	1%	1%			4%		2%	0%	2%			2%
	Other	5%	6%	3%		4%		7%	2%	9%	7%		5%
	Total Count	352	184	34	13	23	26	125	209	106	45	17	165

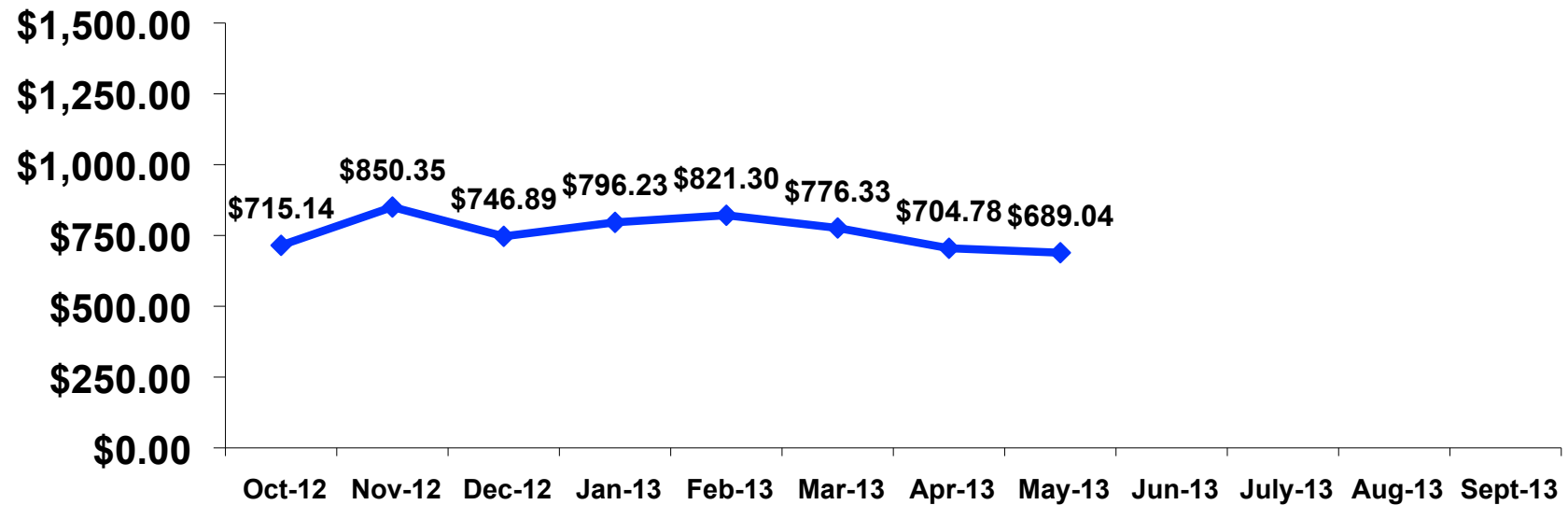
Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	76%	77%	82%	54%	43%	69%	78%	76%	85%	84%	59%	79%	
	Travel Guidebook- Bookstore	55%	56%	53%	77%	57%	65%	58%	55%	54%	40%	71%	47%	
	Travel Agent Brochure	42%	43%	26%	46%	52%	58%	46%	46%	32%	31%	71%	28%	
	Prior Trip	42%	51%	38%	38%	48%	35%	37%	32%	60%	58%	24%	90%	
	Magazine (Consumer)	33%	32%	26%	46%	35%	38%	33%	36%	26%	36%	47%	27%	
	Friend/ Relative	28%	21%	26%	31%	39%	46%	34%	34%	11%	16%	12%	18%	
	TV	8%	10%	6%	23%	13%	8%	12%	8%	6%	7%	12%	4%	
	Co-Worker/ Company Trvl Dept	3%	2%	3%	8%	13%	4%	5%	4%	1%	2%		2%	
	Consumer Trvl Show	3%	5%	3%		4%	12%	3%	2%	4%	2%	6%	2%	
	GVB Office	1%	2%			4%	4%	2%	0%	2%			2%	
	Other	1%	1%			4%		1%	0%	1%	2%		1%	
	GVB Promo	1%	2%	3%		4%	8%	1%	0%					
	Newspaper	1%	1%			13%	4%						1%	
	Theater Ad	0%	1%			4%	4%							
	Radio	0%	1%			4%	4%							
	Total	Count	352	184	34	13	23	26	125	209	106	45	17	165

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

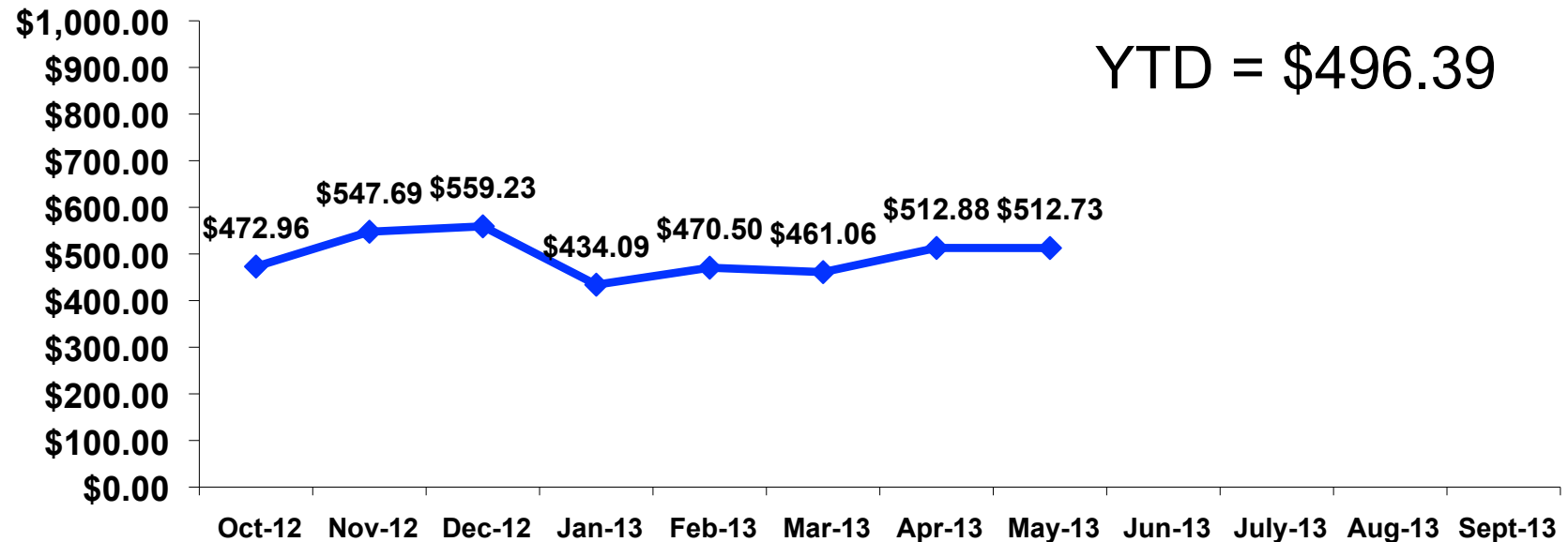
YTD=\$762.49



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	\$689.04	\$723.96	\$629.93	\$362.65	\$949.23	\$728.77	\$712.41	\$650.87	\$713.20	\$616.67	\$832.55	\$694.91
	Median	\$598	\$640	\$498	\$498	\$698	\$573	\$598	\$548	\$673	\$531	\$748	\$598
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$4,984	\$4,984	\$1,894	\$797	\$4,984	\$4,984	\$2,492	\$2,492	\$1,993	\$2,193	\$1,993	\$2,243

On-Island Expenditures Tracking



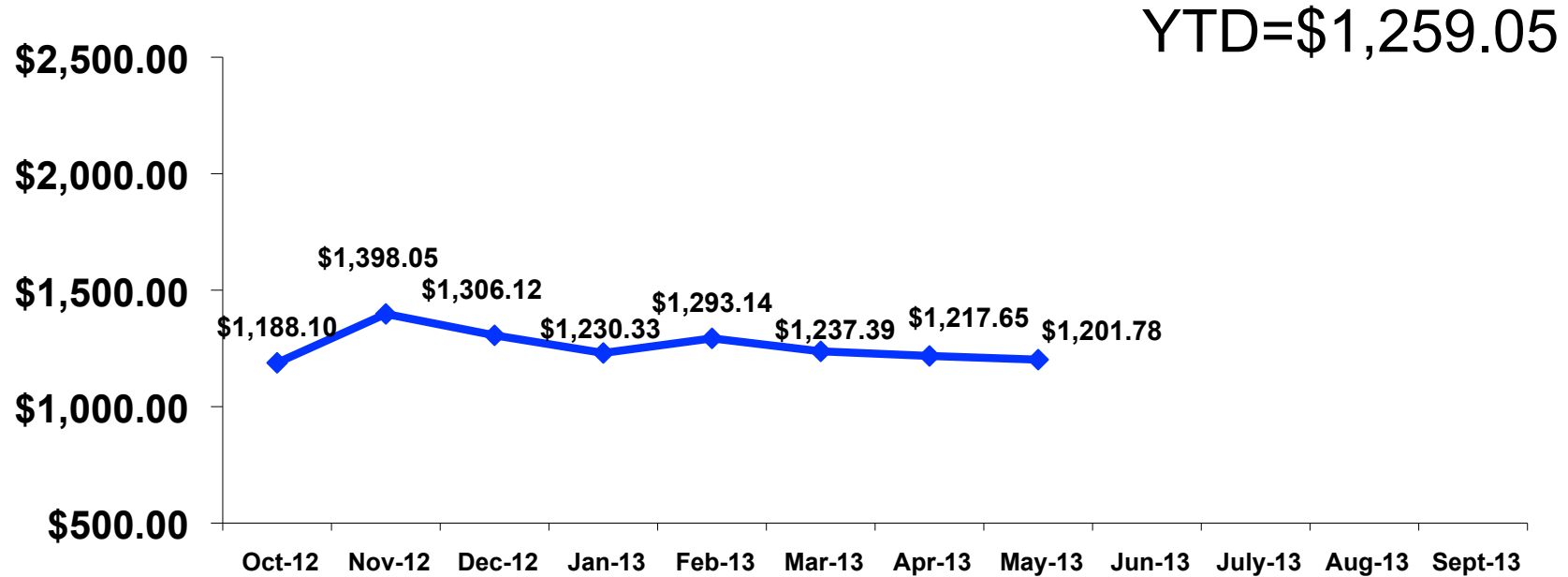
ON-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$512.73	\$448.08	\$456.73	\$388.56	\$531.26	\$441.43	\$594.76	\$525.35	\$482.57	\$359.17	\$545.78	\$521.00
	Median	\$400	\$350	\$388	\$400	\$354	\$355	\$480	\$400	\$350	\$300	\$400	\$400
	Minimum	\$0	\$0	\$0	\$60	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,000	\$3,500	\$2,000	\$633	\$1,750	\$1,750	\$5,000	\$5,000	\$4,000	\$2,000	\$1,750	\$4,000

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	\$35.70	\$49.64	\$21.62	\$40.00	\$70.30	\$61.50	\$30.22	\$15.72	\$65.09	\$79.78	\$41.76	\$49.09
	Median	\$0	\$0	\$0	\$0	\$17	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.02	\$37.35	\$14.41	\$28.46	\$53.74	\$35.88	\$27.00	\$24.65	\$34.36	\$41.84	\$20.00	\$38.01
	Median	\$8	\$13	\$4	\$10	\$0	\$4	\$8	\$6	\$19	\$18	\$0	\$9
F&B RESTRNT	Mean	\$88.14	\$111.58	\$77.24	\$54.62	\$144.35	\$142.73	\$92.94	\$65.02	\$119.96	\$142.89	\$108.82	\$101.94
	Median	\$10	\$20	\$50	\$0	\$0	\$0	\$15	\$5	\$43	\$70	\$0	\$30
OPT TOUR	Mean	\$119.88	\$142.01	\$25.74	\$128.31	\$163.35	\$77.27	\$200.55	\$82.65	\$169.91	\$125.84	\$47.65	\$143.35
	Median	\$0	\$0	\$0	\$100	\$0	\$0	\$30	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$205.33	\$262.40	\$244.85	\$151.00	\$260.22	\$307.69	\$190.55	\$192.88	\$211.58	\$247.78	\$466.47	\$249.92
	Median	\$25	\$50	\$35	\$100	\$50	\$90	\$15	\$20	\$13	\$0	\$100	\$50
GIFT- OTHER	Mean	\$142.63	\$166.13	\$139.41	\$133.08	\$294.52	\$260.58	\$157.74	\$126.34	\$136.93	\$102.89	\$115.88	\$155.41
	Median	\$50	\$50	\$50	\$100	\$54	\$90	\$50	\$50	\$40	\$40	\$50	\$50
TRANS	Mean	\$18.56	\$23.65	\$7.88	\$12.31	\$5.57	\$3.08	\$23.94	\$13.12	\$31.68	\$28.64	\$15.29	\$29.25
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$254.30	\$249.99	\$89.59	\$42.08	\$217.17	\$227.58	\$324.80	\$241.19	\$294.72	\$311.18	\$355.88	\$250.61
	Median	\$0	\$0	\$0	\$0	\$0	\$33	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$898.28	\$1,044.10	\$620.91	\$589.85	\$1,209.22	\$1,124.23	\$1,046.52	\$765.43	\$1,067.16	\$1,080.84	\$1,171.76	\$1,018.20
	Median	\$600	\$775	\$490	\$500	\$708	\$550	\$600	\$500	\$780	\$1,000	\$1,000	\$635

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	\$1,201.78	\$1,172.04	\$1,086.66	\$751.21	\$1,480.49	\$1,170.21	\$1,307.17	\$1,176.23	\$1,195.77	\$975.85	\$1,378.33	\$1,215.90
	Median	\$1,076	\$1,081	\$1,097	\$798	\$1,438	\$1,164	\$1,133	\$1,048	\$1,061	\$898	\$1,282	\$1,096
	Minimum	\$0	\$0	\$60	\$60	\$598	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$6,058	\$6,058	\$2,668	\$1,286	\$6,058	\$6,058	\$5,897	\$5,897	\$5,993	\$3,495	\$2,996	\$5,993

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 2013, and Overall Oct-2012 - May 2013									
Drivers:	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Combined Oct-2012 - May 2013
	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		8
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						
Quality of hotel accommodations		2		2		3	4		2
Quality/cleanliness of air, sky									
Quality/cleanliness of parks									
Quality of landscape in Tumon			1						9
Quality of landscape in Guam	1	1		1	2	1	3	1	1
Quality of ground handler			3			4			7
Quality/cleanliness of transportation vehicles	2				5		2	2	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%	44.4%

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 May 2013 Period. By rank order they are:
 - **Quality of landscape in Guam**
 - **Quality/cleanliness of transportation vehicles, and**
 - **Quality of day time tours.**
- With all three factors the overall r^2 is .388 meaning that **38.8% of overall satisfaction is accounted for by these three factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct,Nov,Dec 2012, Jan, Feb, Mar, Apr, May 2013 and Overall Oct-2012-May 2013									
	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Combined Oct-2012-May 2013
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks								3	3
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					4
Quality of shopping			3	4					2
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									1
% of Per Person On Island Expenditures Accounted For	0.0%	0.0%	4.8%	16.2%	0.0%	0.0%	1.7%	6.7%	2.2%

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 May 2013 Period. Those factors are:
 - **Quality of ground handler,**
 - **Quality of landscape in Guam, and**
 - **Quality/cleanliness of beaches & parks.**
- With these factors the overall r^2 is .067 meaning that **6.7% of Per Person On Island Expenditure is accounted for by these factors.**