



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013 Market Segmentation

NOVEMBER 2012



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

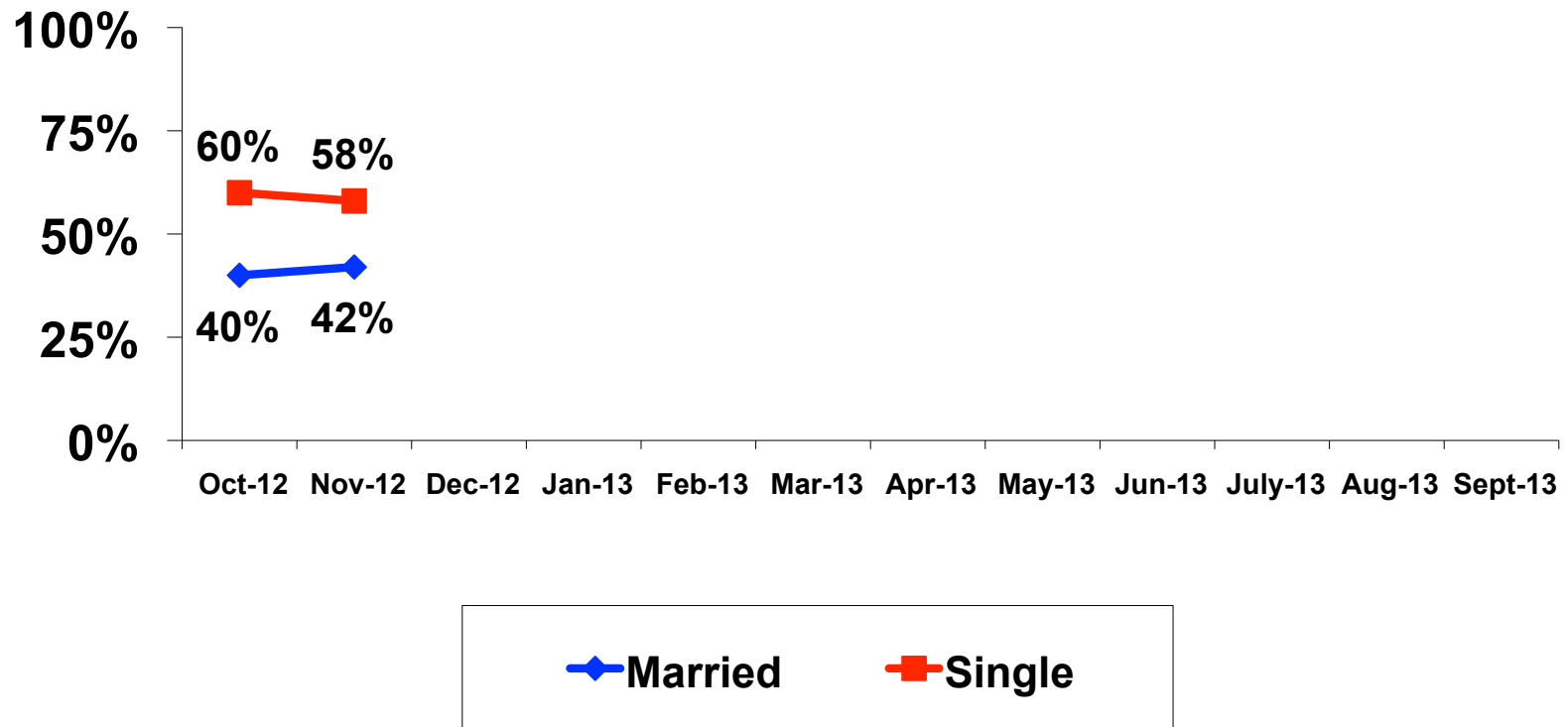
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%										
Office Lady	15%	10%										
Group	3%	3%										
Silver	6%	5%										
Wedding	10%	9%										
Sport	37%	39%										
18-35	67%	72%										
36-55	23%	20%										
Child	13%	9%										
Honeymoon	5%	6%										
Repeat	42%	37%										
TOTAL	351	351										

SECTION 1 **PROFILE OF RESPONDENTS**

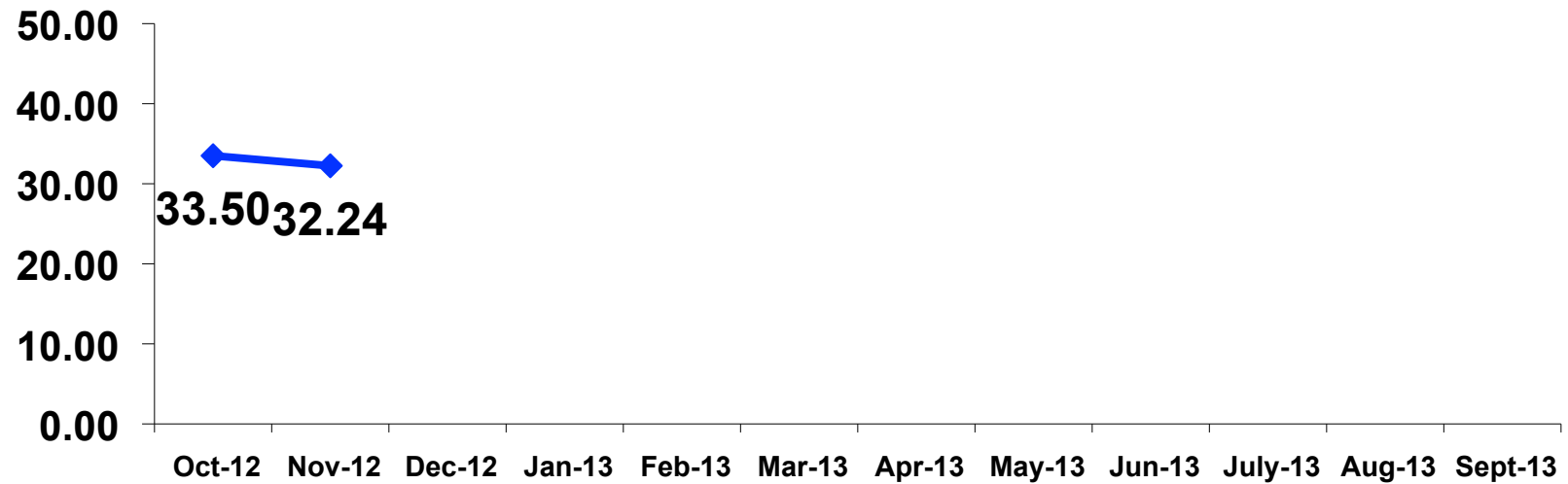
Marital Status Tracking



Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	42%	85%	23%	27%	93%	68%	29%	27%	77%	89%	95%	50%
	Single	58%	15%	77%	73%	7%	32%	71%	73%	23%	11%	5%	50%
	Total Count	349	128	35	11	15	31	133	252	70	28	20	129

Average Age Tracking



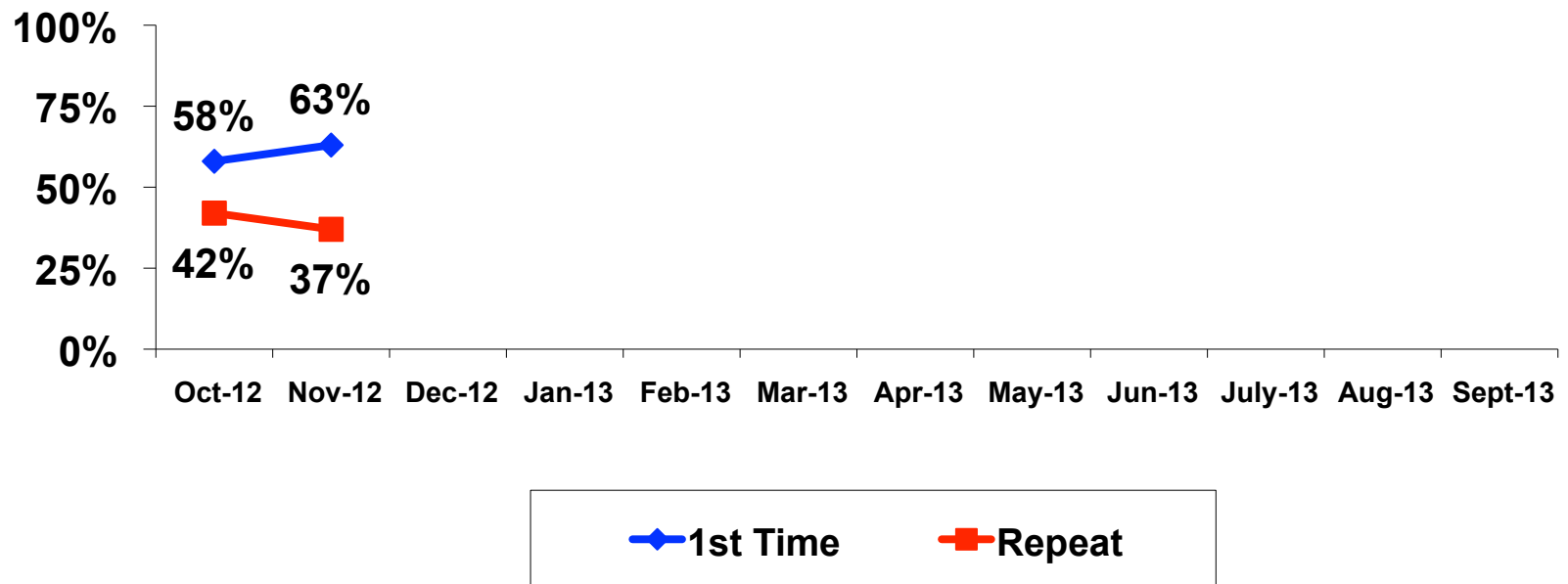
Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	29%	4%	17%	18%		3%	40%	40%				16%
	25-34	42%	46%	60%	36%		52%	39%	58%		27%	85%	46%
	35-49	17%	30%	20%	27%		23%	11%	1%	80%	57%	10%	25%
	50+	12%	20%	3%	18%	100%	23%	10%		20%	17%	5%	13%
	Total Count	350	130	35	11	16	31	134	252	71	30	20	129
QF	Mean	32.24	38.33	30.57	34.18	63.94	37.97	30.56	25.87	43.80	41.37	31.45	34.51
	Median	28	35	27	29	63	31	26	25	43	41	31	31

Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	6%	1%		9%			4%	8%				2%
	Y2.0M-Y3.0M	10%	7%	16%		13%	12%	9%	12%	6%	4%	16%	7%
	Y3.0M-Y4.0M	13%	13%	26%	27%	13%	24%	16%	13%	11%	14%	21%	16%
	Y4.0M-Y5.0M	15%	18%	19%	9%	7%	20%	17%	18%	10%	11%	16%	16%
	Y5.0M-Y7.0M	23%	27%	10%	27%	7%	32%	24%	22%	27%	32%	42%	22%
	Y7.0M-Y10.0M	17%	22%	26%	18%	40%	8%	11%	12%	29%	21%		21%
	Y10.0M+	13%	13%	3%	9%	20%	4%	11%	11%	16%	18%	5%	14%
	No Income	4%						7%	6%				3%
	Total Count	302	116	31	11	15	25	116	216	62	28	19	118

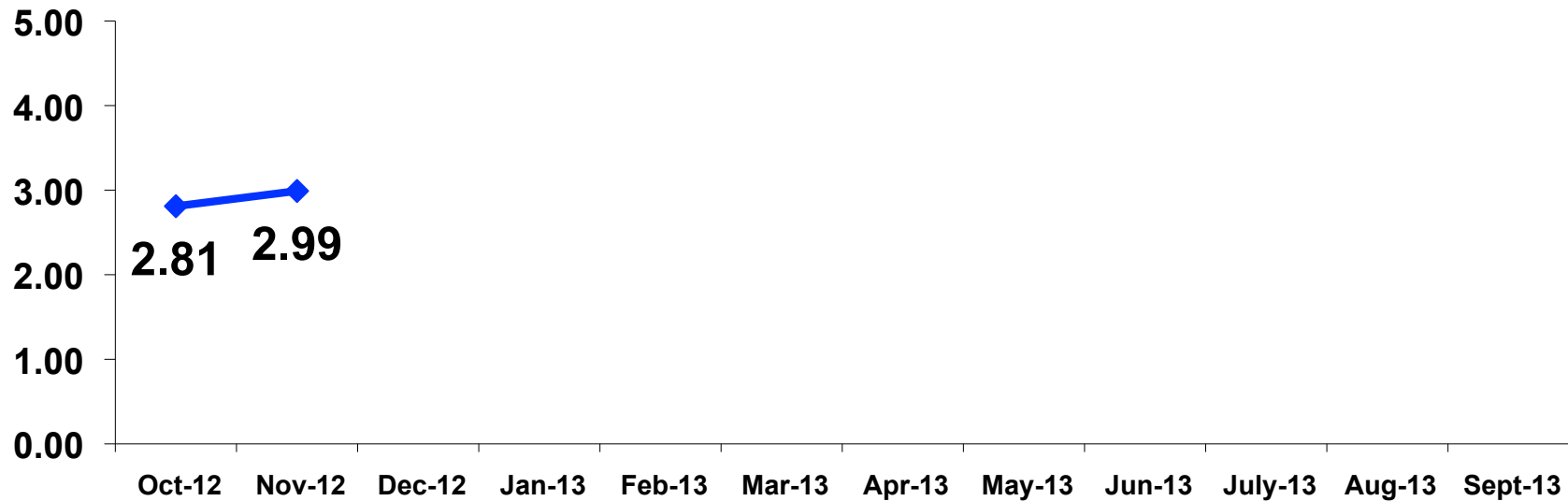
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	63%	59%	46%	73%	60%	80%	67%	68%	47%	45%	80%	
	No	37%	41%	54%	27%	40%	20%	33%	32%	53%	55%	20%	100%
	Total Count	347	127	35	11	15	30	132	251	70	29	20	130

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	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q8	Mean	2.99	3.07	2.63	3.27	3.20	3.19	3.07	2.96	3.00	3.00	3.60	2.92
	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	70%	59%	83%		63%	52%	67%	72%	69%	67%	45%	76%	
	Full package tour	20%	30%	11%		31%	35%	24%	21%	15%	23%	55%	15%	
	Individually arranged travel (FIT)	5%	9%				10%	7%	3%	8%	10%		6%	
	Group tour	3%	1%	6%	100%	6%	3%	2%	2%	6%			2%	
	Company paid travel	1%	1%						1%	1%			1%	
	Other	1%						1%	1%					
	Total	Count	351	130	35	11	16	31	135	252	71	30	20	130

Travel Motivation Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	29%	33%	46%	18%	31%	16%	27%	28%	32%	40%	10%	79%
	Price	30%	28%	31%		13%		27%	31%	30%	33%	20%	30%
	Visit friends/ Relatives	3%	2%	3%		6%		4%	2%	3%	3%		4%
	Reconnun- friend/family/trvl agnt	26%	12%	11%		19%	10%	32%	31%	11%	10%	5%	13%
	Scuba	8%	5%		9%	6%		15%	8%	4%		5%	10%
	Water sports	24%	18%	20%	18%	19%	3%	41%	28%	13%	13%	20%	19%
	Short travel time	50%	53%	46%	18%	44%	26%	53%	49%	55%	50%	25%	52%
	Golf	3%	4%	3%	9%	6%	3%	4%	2%	4%		5%	4%
	Relax	30%	35%	34%	9%	19%	6%	36%	32%	31%	40%	10%	30%
	Company/ Business Trip	6%	2%	11%	55%	13%		4%	5%	7%			6%
	Company Sponsored	0%	1%							1%	3%		
	Safe	21%	25%	20%		38%	6%	25%	19%	28%	23%	5%	25%
	Natural beauty	57%	53%	57%	27%	56%	26%	60%	59%	51%	47%	45%	58%
	Shopping	39%	35%	54%		38%	23%	36%	42%	28%	23%	25%	46%
	Married/ Attn wedding	9%	15%	6%	9%	6%	100%	6%	7%	11%	17%	20%	5%
	Honeymoon	6%	15%			6%	13%	4%	7%	3%	3%	100%	3%
	Pleasure	52%	38%	54%	18%	31%	13%	66%	57%	42%	43%	25%	48%
	Organized sports	2%	1%					4%	3%				2%
	Other	5%	6%	3%	9%	13%	3%	3%	4%	7%	7%		5%
	Total	Count	351	130	35	11	16	31	135	252	71	30	130

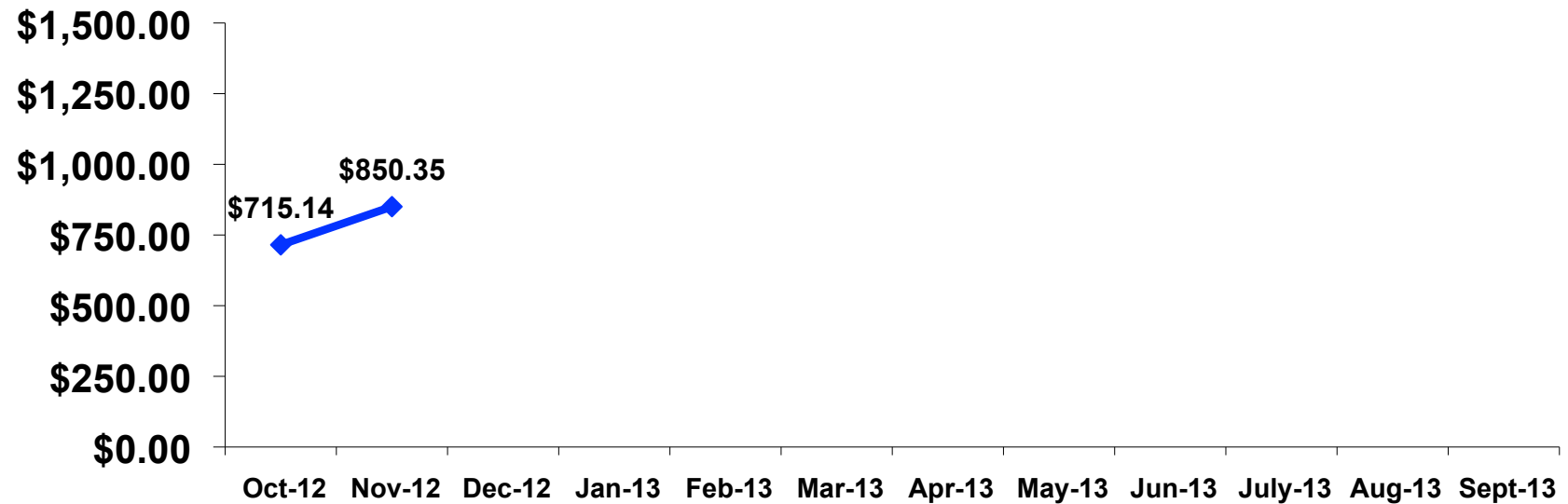
Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	74%	72%	80%	45%	40%	65%	75%	73%	80%	77%	65%	78%	
	Travel Guidebook- Bookstore	60%	62%	63%	18%	53%	68%	60%	61%	54%	67%	60%	59%	
	Travel Agent Brochure	50%	43%	40%	36%	47%	55%	54%	51%	49%	43%	55%	40%	
	Friend/ Relative	38%	17%	23%	36%	47%	42%	47%	43%	18%	13%	15%	27%	
	Magazine (Consumer)	38%	32%	23%		27%	26%	43%	42%	25%	37%	30%	35%	
	Prior Trip	30%	35%	49%	18%	40%	19%	26%	26%	42%	47%	20%	81%	
	TV	8%	7%	6%	9%	20%	6%	9%	8%	3%	3%		8%	
	Consumer Trvl Show	4%	5%	6%			6%	4%	5%	4%	3%	10%	5%	
	Co-Worker/ Company Trvl Dept	4%	4%	6%	9%		10%	3%	4%	4%	3%		2%	
	Newspaper	1%	2%			7%	3%	1%	2%		3%	5%		
	GVB Office	1%	1%					1%	0%	1%				
	Other	0%							0%				1%	
	Travel Trade Show	0%							0%				1%	
	GVB Promo	0%						1%	0%					
	Total	Count	349	130	35	11	15	31	134	251	71	30	20	130

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

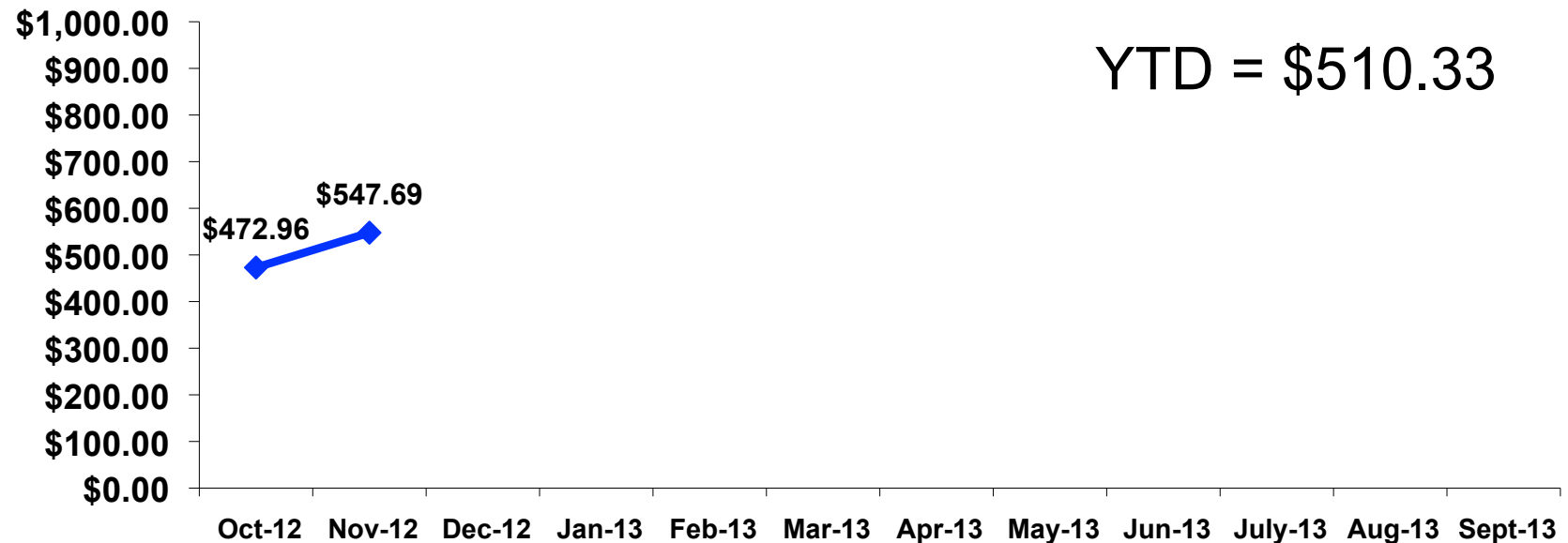
YTD=\$782.75



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	\$850.35	\$957.72	\$746.00	\$430.63	\$970.45	\$1,330.37	\$870.18	\$840.57	\$818.69	\$825.34	\$1,576.18	\$832.70
Median	\$751	\$751	\$751	\$0	\$938	\$1,251	\$788	\$751	\$751	\$751	\$1,313	\$751
Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Maximum	\$5,629	\$5,629	\$1,876	\$1,501	\$1,751	\$5,629	\$4,691	\$5,629	\$2,189	\$1,876	\$4,691	\$3,440

On-Island Expenditures Tracking



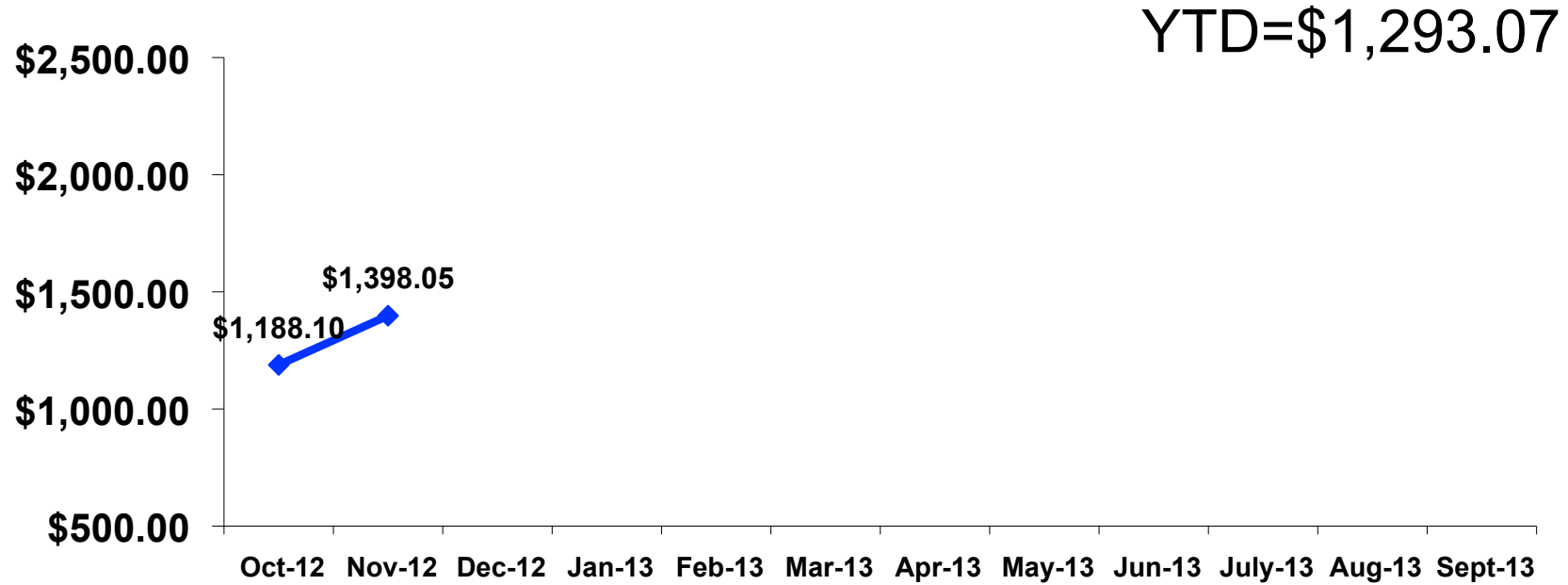
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$547.69	\$479.52	\$535.70	\$329.00	\$857.27	\$586.30	\$578.71	\$544.22	\$481.11	\$424.49	\$487.58	\$638.49
	Median	\$400	\$395	\$400	\$200	\$500	\$435	\$460	\$425	\$333	\$329	\$468	\$428
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$6,000	\$2,400	\$2,500	\$1,200	\$6,000	\$4,600	\$4,600	\$4,600	\$1,800	\$1,300	\$1,250	\$6,000

On-Island Expense Breakdown

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$28.77	\$52.62	\$12.49	\$5.64	\$119.94	\$55.35	\$23.21	\$18.95	\$40.00	\$66.73	\$45.00	\$22.77
	Median	\$0	\$0	\$0	\$0	\$48	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$34.22	\$53.72	\$11.60	\$3.36	\$15.63	\$43.65	\$27.59	\$32.11	\$44.82	\$106.83	\$59.00	\$35.06
	Median	\$10	\$15	\$0	\$0	\$5	\$0	\$0	\$8	\$15	\$30	\$5	\$9
F&B RESTRNT	Mean	\$90.59	\$131.24	\$92.80	\$12.27	\$150.13	\$134.52	\$70.14	\$84.79	\$98.83	\$194.27	\$167.50	\$100.08
	Median	\$30	\$70	\$25	\$0	\$50	\$25	\$30	\$35	\$20	\$110	\$100	\$30
OPT TOUR	Mean	\$95.08	\$114.03	\$39.17	\$13.82	\$145.88	\$49.03	\$118.47	\$82.92	\$128.61	\$175.03	\$123.50	\$92.85
	Median	\$0	\$0	\$0	\$0	\$45	\$0	\$48	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$233.66	\$263.46	\$237.00	\$56.64	\$736.25	\$172.74	\$178.78	\$192.41	\$256.89	\$397.67	\$240.00	\$354.41
	Median	\$50	\$50	\$50	\$0	\$0	\$0	\$50	\$50	\$80	\$100	\$25	\$100
GIFT- OTHER	Mean	\$126.15	\$156.34	\$101.23	\$43.45	\$180.75	\$100.48	\$133.19	\$114.27	\$147.69	\$208.73	\$179.50	\$152.48
	Median	\$60	\$100	\$50	\$0	\$131	\$0	\$60	\$50	\$100	\$100	\$125	\$80
TRANS	Mean	\$16.95	\$26.77	\$6.31	\$17.27	\$15.81	\$13.74	\$16.02	\$12.86	\$31.70	\$63.83	\$3.40	\$26.25
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$218.66	\$292.45	\$175.86	\$176.55	\$198.63	\$388.65	\$254.81	\$223.74	\$183.93	\$220.30	\$197.50	\$268.61
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$845.60	\$1,090.17	\$676.46	\$329.00	\$1,550.50	\$958.23	\$821.19	\$764.39	\$934.44	\$1,447.40	\$1,001.40	\$1,061.83
	Median	\$600	\$905	\$420	\$200	\$975	\$690	\$600	\$536	\$700	\$1,000	\$935	\$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	\$1,398.05	\$1,437.24	\$1,281.71	\$759.63	\$1,827.72	\$1,916.67	\$1,448.89	\$1,384.79	\$1,299.80	\$1,249.83	\$2,063.76	\$1,471.19
	Median	\$1,248	\$1,238	\$1,251	\$500	\$1,517	\$1,751	\$1,276	\$1,241	\$1,163	\$1,113	\$1,709	\$1,251
	Minimum	\$0	\$0	\$200	\$0	\$750	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$7,126	\$5,679	\$3,376	\$2,451	\$7,126	\$5,679	\$5,628	\$5,679	\$2,939	\$2,689	\$5,628	\$7,126

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 2012, and Overall Oct-Nov 2012			
	Oct-12	Nov-12	Combined Oct-Nov 2012
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks	5	3	3
Ease of getting around	3		7
Safety walking around at night			5
Quality of daytime tours			6
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping	4	4	4
Variety of shopping			
Price of things on Guam			
Quality of hotel accommodations		2	2
Quality/cleanliness of air, sky			
Quality/cleanliness of parks			
Quality of landscape in Tumon			
Quality of landscape in Guam	1	1	1
Quality of ground handler			
Quality/cleanliness of transportation vehicles	2		
% of Per Person On Island Expenditures Accounted For	54.7%	50.6%	52.6%
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 November 2012 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Quality of hotel accommodations,**
 - **Quality/cleanliness of beaches & parks, and**
 - **Quality of shopping.**
- With all four factors the overall r^2 is .506 meaning that **50.6% of overall satisfaction is accounted for by these four factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct,Nov 2012, and Overall Oct-Nov 2012			
	Oct-12	Nov-12	Combined Oct-Nov 2012
Drivers:	rank	rank	rank
Quality & Cleanliness of beaches & parks			
Ease of getting around			
Safety walking around at night			
Quality of daytime tours			
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping			
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			
Quality/cleanliness of transportation vehicles			
% of Per Person On Island Expenditures Accounted For	0.0%	0.0%	0.0%
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 November 2012 Period.