



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013 Market Segmentation

SEPTEMBER 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

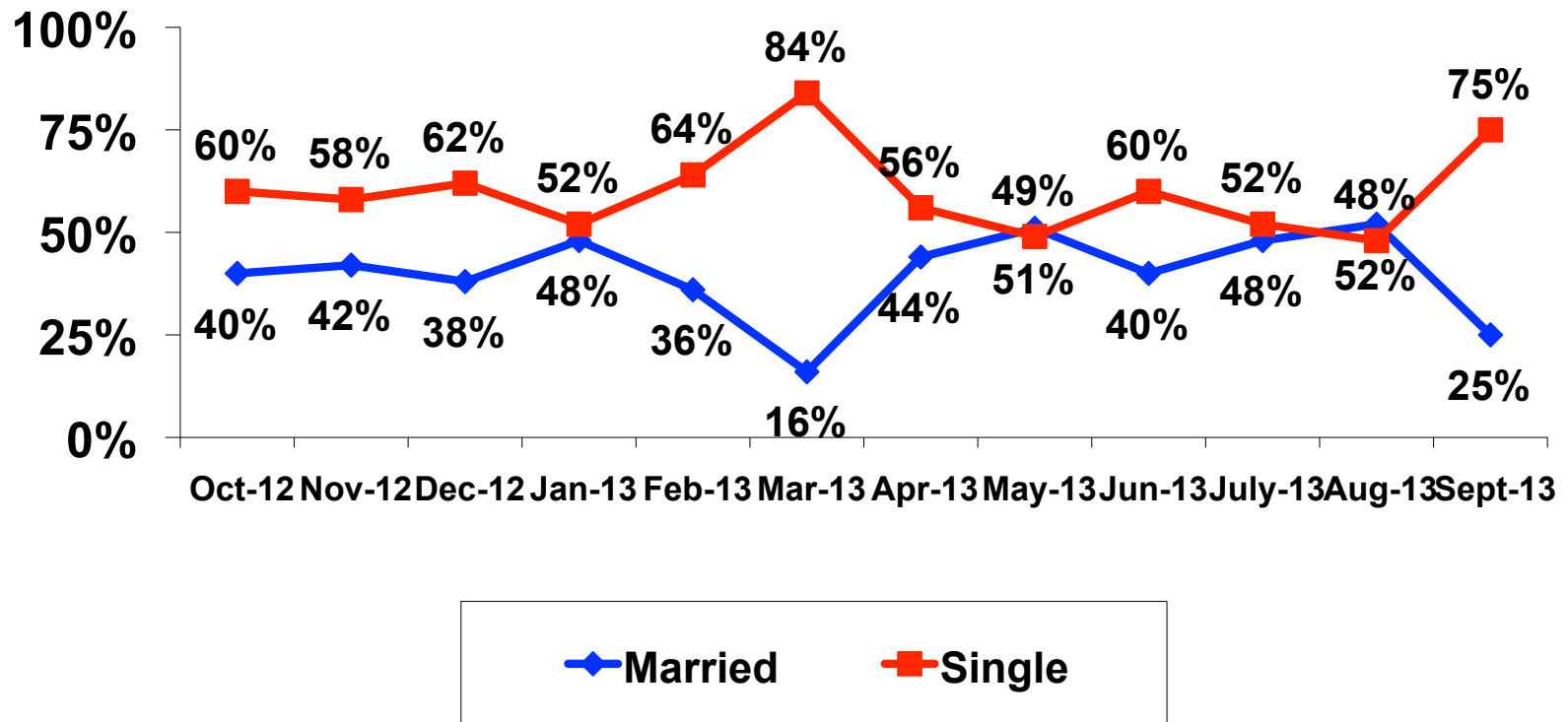
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%	34%	19%	40%	52%	37%	47%	57%	25%
Office Lady	15%	10%	13%	11%	9%	4%	13%	10%	10%	14%	10%	16%
Group	3%	3%	2%	3%	3%	9%	1%	4%	3%	3%	2%	3%
Silver	6%	5%	6%	3%	3%	1%	4%	7%	3%	3%	1%	1%
Wedding	10%	9%	7%	7%	9%	5%	6%	7%	7%	4%	2%	2%
Sport	37%	39%	32%	41%	43%	42%	29%	36%	37%	34%	44%	36%
18-35	67%	72%	69%	62%	80%	85%	62%	59%	73%	64%	56%	80%
36-55	23%	20%	22%	33%	17%	11%	31%	30%	22%	30%	41%	17%
Child	13%	9%	13%	21%	12%	6%	19%	13%	9%	17%	36%	8%
Honeymoon	5%	6%	6%	2%	4%	2%	3%	5%	5%	4%	1%	1%
Repeat	42%	37%	38%	47%	35%	24%	43%	47%	43%	44%	46%	33%
TOTAL	351	351	352	351	352	353	351	352	350	352	350	351

SECTION 1 **PROFILE OF RESPONDENTS**

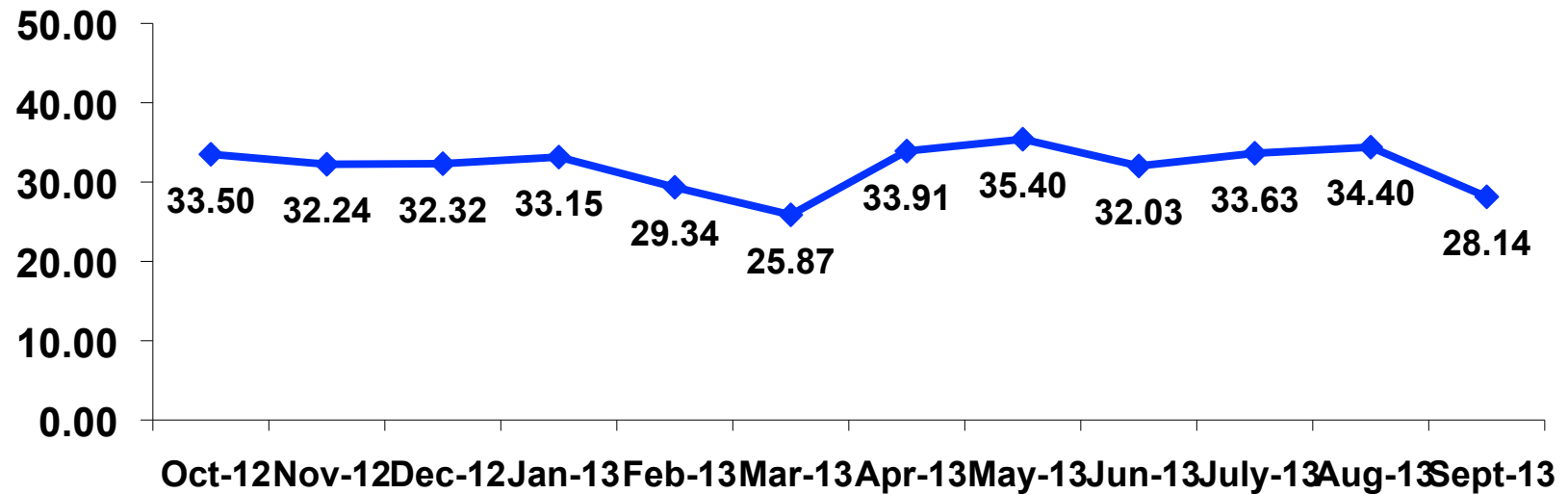
Marital Status Tracking



Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	25%	72%	14%	44%	100%	71%	22%	14%	73%	96%	100%	35%
	Single	75%	28%	86%	56%		29%	78%	86%	27%	4%		65%
	Total Count	345	87	57	9	3	7	122	280	59	28	4	114

Average Age Tracking



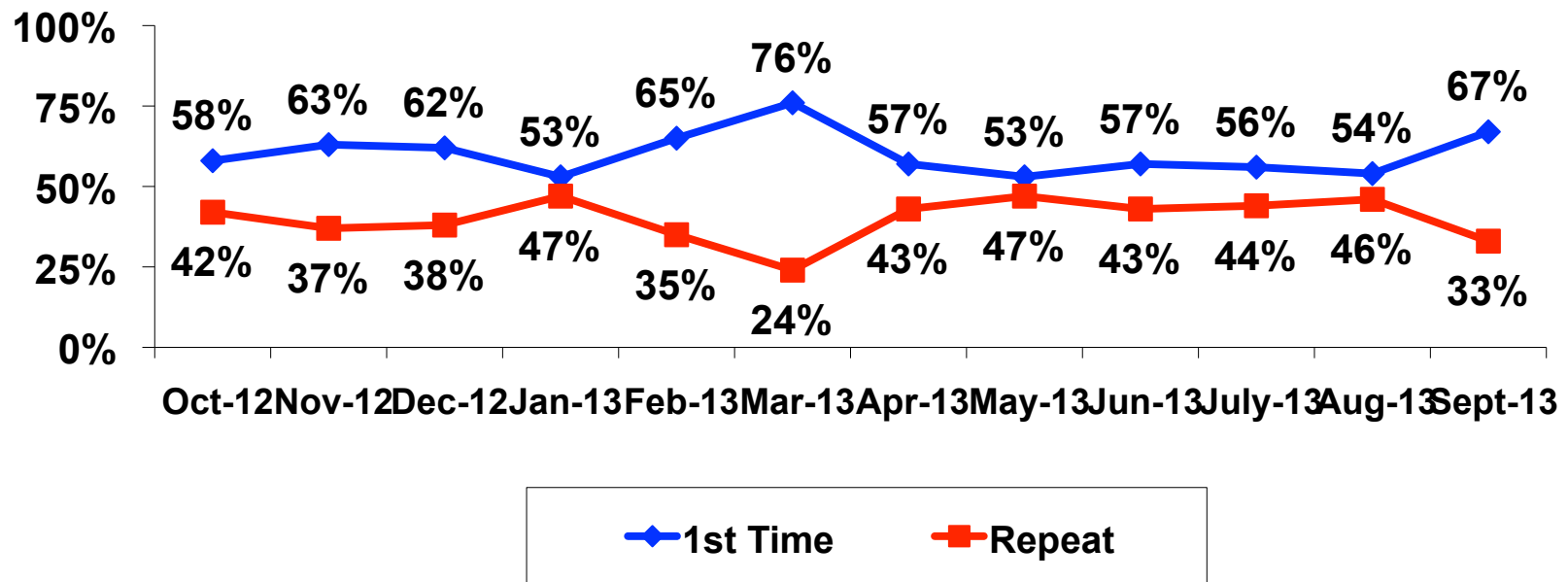
Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	46%	14%	26%	56%			47%	56%				28%
	25-34	33%	32%	46%	33%		14%	33%	40%		29%	50%	34%
	35-49	16%	38%	26%	11%		57%	17%	4%	77%	54%	50%	29%
	50+	5%	17%	2%		100%	29%	3%		23%	18%		8%
	Total Count	347	88	57	9	3	7	123	282	60	28	4	116
QF	Mean	28.14	36.55	29.82	26.56	60.00	44.71	27.40	24.39	43.22	40.43	32.75	31.37
	Median	25	35	27	24	60	44	25	24	42	41	32	29

Income Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
	-	-	-	-	-	-	-	-	-	-	-	-
Q26 <Y2.0 million	9%	2%	13%	17%			7%	10%	2%	4%		6%
Y2.0M-Y3.0M	14%	5%	30%	33%			14%	16%	6%	4%		9%
Y3.0M-Y4.0M	13%	6%	26%	17%	33%	33%	15%	14%	8%	4%		9%
Y4.0M-Y5.0M	17%	16%	15%		33%	17%	13%	15%	21%	15%	50%	18%
Y5.0M-Y7.0M	17%	27%	9%	33%	33%	50%	17%	15%	23%	35%	25%	23%
Y7.0M-Y10.0M	14%	26%	4%				15%	12%	21%	15%	25%	14%
Y10.0M+	11%	17%	4%				12%	10%	19%	23%		17%
No Income	6%						7%	7%				2%
Total Count	289	81	47	6	3	6	108	230	52	26	4	98

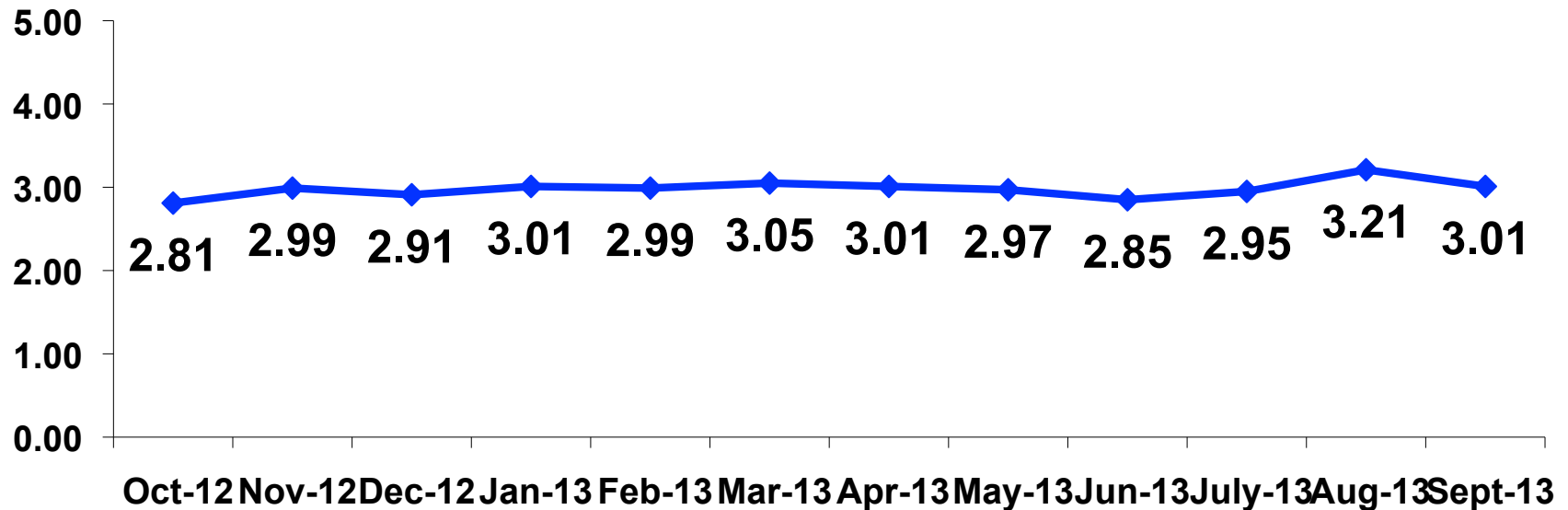
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	67%	53%	61%	67%	33%	57%	65%	72%	43%	43%	75%	
	No	33%	47%	39%	33%	67%	43%	35%	28%	57%	57%	25%	100%
	Total Count	350	88	57	9	3	7	126	281	60	28	4	117

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	3.26	2.88	2.67	3.00	2.86	3.03	2.91	3.45	2.96	3.50	3.10
	Median	3	3	3	3	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	69%	57%	74%		67%	71%	71%	70%	63%	50%	50%	70%
	Full package tour	21%	30%	21%		33%	14%	20%	21%	20%	29%	25%	19%
	Individually arranged travel (FIT)	6%	11%	2%				5%	5%	15%	18%	25%	7%
	Group tour	3%	2%		100%		14%	3%	3%	2%	4%		3%
	Company paid travel	1%		4%				1%	1%				2%
	Total Count	351	88	57	9	3	7	126	282	60	28	4	117

Travel Motivation Segmentation

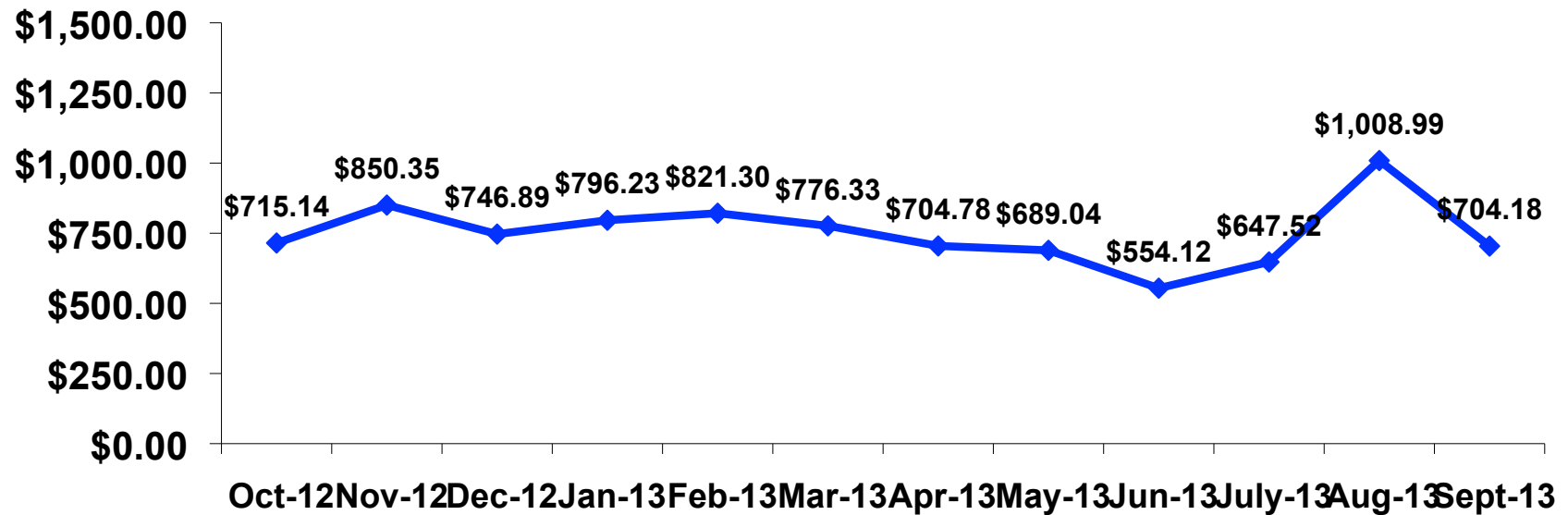
		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	25%	36%	28%	33%	67%	29%	24%	21%	40%	50%	25%	74%	
	Price	32%	20%	35%	11%	33%		36%	34%	23%	11%		29%	
	Visit friends/ Relatives	1%						2%	1%				2%	
	Recomm- friend/family/trvl agnt	25%	15%	30%	56%			27%	29%	8%	18%	25%	21%	
	Scuba	8%	2%	5%	11%			17%	7%	12%			9%	
	Water sports	26%	17%	32%				38%	29%	13%	14%	50%	26%	
	Short travel time	52%	55%	56%	33%	67%	29%	48%	51%	57%	50%	50%	62%	
	Golf	2%	5%					3%	1%	5%			4%	
	Relax	36%	42%	30%	22%		14%	38%	35%	38%	32%	25%	40%	
	Company/ Business Trip	3%		4%			29%	3%	2%	7%			3%	
	Company Sponsored	1%	3%					2%	1%	3%			2%	
	Safe	19%	25%	18%	22%	33%	14%	22%	17%	23%	36%	25%	21%	
	Natural beauty	67%	58%	63%	44%	33%	29%	74%	71%	53%	54%	50%	59%	
	Shopping	42%	28%	51%	22%		29%	40%	45%	32%	32%	50%	40%	
	Career Cert/ Testing	0%	1%					1%		2%			1%	
	Married/ Attn wedding	2%	5%	2%	11%	33%	100%		0%	8%	4%		3%	
	Honeymoon	1%	5%					2%	1%	3%		100%	1%	
	Pleasure	54%	49%	49%	44%	33%	14%	57%	56%	45%	57%	50%	53%	
	Organized sports	1%	2%					2%	1%	2%	4%			
	Other	3%	5%	4%				2%	3%	3%	4%		2%	
	Total	Count	351	88	57	9	3	7	126	282	60	28	4	117

Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	81%	82%	77%	67%	67%	71%	83%	81%	80%	93%	50%	87%	
	Travel Guidebook- Bookstore	58%	56%	63%	33%	67%	43%	65%	60%	48%	36%	50%	50%	
	Travel Agent Brochure	51%	44%	46%	22%	100%	57%	58%	52%	40%	29%	50%	41%	
	Magazine (Consumer)	41%	45%	27%	33%	33%	29%	49%	44%	32%	39%		38%	
	Friend/ Relative	36%	22%	38%	33%		14%	38%	39%	22%	21%	25%	25%	
	Prior Trip	26%	40%	27%	22%	67%	29%	27%	21%	47%	50%	25%	77%	
	TV	13%	13%	16%	22%			14%	13%	15%	11%		14%	
	Consumer Trvl Show	3%	3%					6%	4%	2%	4%	25%	3%	
	Co-Worker/ Company Trvl Dept	3%	2%	9%				2%	4%	3%			4%	
	Newspaper	1%		2%					1%	2%				
	Other	1%	1%	2%			14%		1%					
	Travel Trade Show	1%		2%				1%	1%				1%	
	GVB Office	1%	1%					2%	1%				1%	
	Radio	0%						1%	0%					
	GVB Promo	0%	1%					1%	0%					
	Total	Count	349	88	56	9	3	7	125	280	60	28	4	117

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

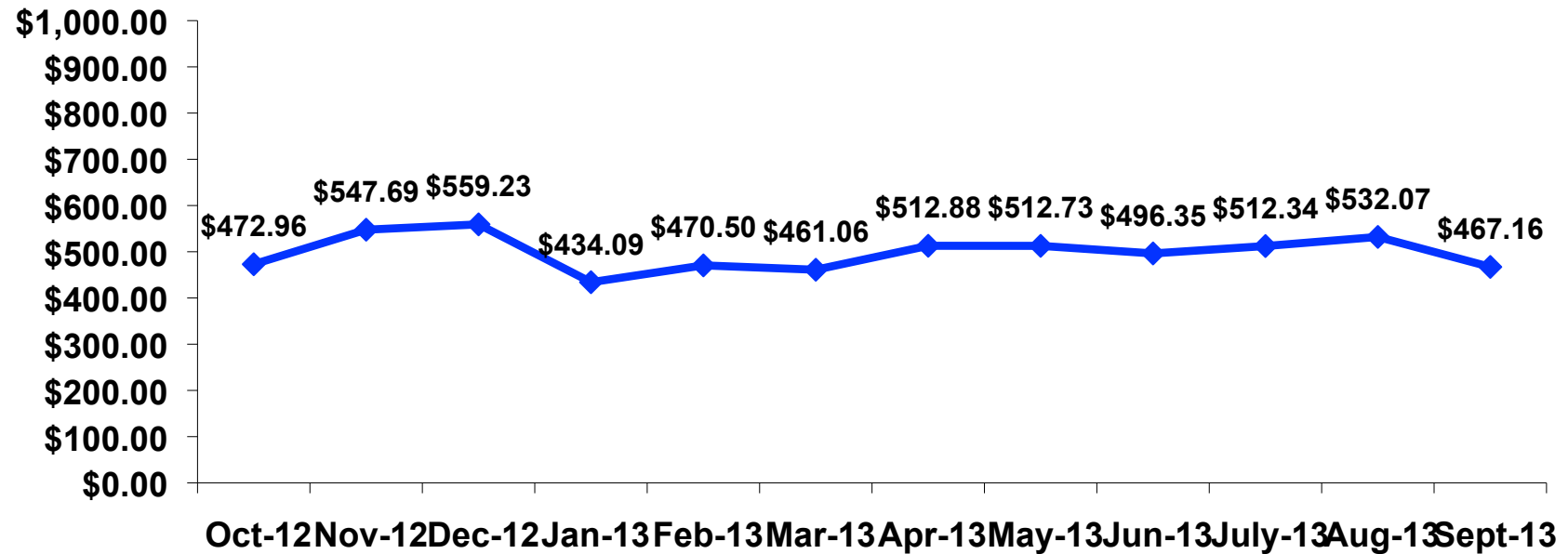


YTD=\$751.20

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	\$704.18	\$751.48	\$739.61	\$613.99	\$362.36	\$751.31	\$709.90	\$688.43	\$793.57	\$626.94	\$1,207.85	\$740.00
	Median	\$654	\$715	\$705	\$604	\$433	\$755	\$654	\$654	\$755	\$663	\$1,258	\$705
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,007	\$0
	Maximum	\$2,013	\$2,013	\$1,409	\$1,158	\$654	\$1,208	\$2,013	\$2,013	\$1,510	\$1,342	\$1,309	\$2,013

On-Island Expenditures Tracking



YTD = \$498.25

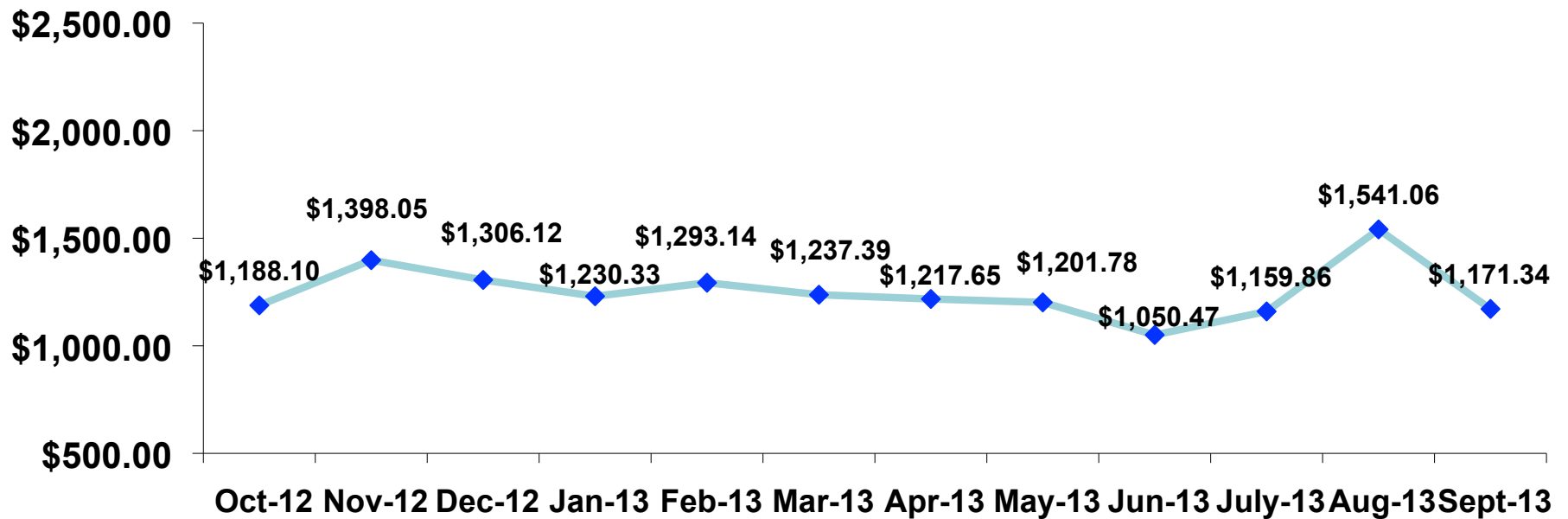
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$467.16	\$437.57	\$558.22	\$288.15	\$279.83	\$344.76	\$483.03	\$460.04	\$500.08	\$373.44	\$581.63	\$499.63
	Median	\$400	\$363	\$500	\$333	\$305	\$390	\$400	\$388	\$448	\$292	\$600	\$400
	Minimum	\$0	\$0	\$0	\$0	\$185	\$0	\$0	\$0	\$0	\$0	\$200	\$0
	Maximum	\$3,000	\$2,000	\$2,500	\$500	\$350	\$525	\$1,720	\$3,000	\$2,000	\$1,550	\$927	\$2,500

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	\$22.48	\$57.99	\$7.37	\$0.00	\$70.00	\$15.71	\$17.21	\$12.14	\$67.63	\$73.14	\$32.50	\$37.44
	Median	\$0	\$0	\$0	\$0	\$60	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$33.54	\$52.06	\$19.51	\$28.89	\$86.67	\$17.14	\$31.76	\$30.49	\$44.97	\$50.57	\$65.75	\$34.84
	Median	\$10	\$45	\$5	\$0	\$100	\$15	\$15	\$10	\$32	\$45	\$75	\$10
F&B RESTRNT	Mean	\$76.78	\$150.60	\$46.67	\$28.67	\$116.67	\$132.86	\$69.60	\$73.99	\$91.67	\$151.43	\$200.00	\$102.70
	Median	\$25	\$100	\$25	\$0	\$110	\$110	\$33	\$20	\$48	\$100	\$150	\$60
OPT TOUR	Mean	\$67.72	\$75.41	\$83.00	\$50.00	\$0.00	\$135.71	\$90.50	\$69.50	\$66.27	\$87.71	\$97.50	\$88.64
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$48	\$0	\$0	\$0	\$120	\$0
GIFT- SELF	Mean	\$184.29	\$369.32	\$192.96	\$41.11	\$186.67	\$242.86	\$189.28	\$144.66	\$354.70	\$495.71	\$637.50	\$251.43
	Median	\$30	\$100	\$0	\$0	\$100	\$0	\$50	\$20	\$100	\$110	\$525	\$50
GIFT- OTHER	Mean	\$91.74	\$129.94	\$103.21	\$21.11	\$46.67	\$57.86	\$98.61	\$78.77	\$140.20	\$133.21	\$112.50	\$103.22
	Median	\$50	\$100	\$20	\$0	\$40	\$55	\$59	\$40	\$100	\$100	\$125	\$50
TRANS	Mean	\$15.68	\$26.78	\$5.63	\$8.33	\$33.00	\$12.86	\$14.54	\$13.76	\$25.30	\$22.50	\$17.50	\$19.48
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$151.05	\$130.89	\$144.65	\$233.00	\$20.00	\$147.86	\$127.70	\$139.79	\$221.67	\$196.43	\$0.00	\$139.07
	Median	\$0	\$0	\$0	\$137	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$644.02	\$992.99	\$603.54	\$411.11	\$559.67	\$762.86	\$640.77	\$563.86	\$1,013.07	\$1,210.71	\$1,163.25	\$776.81
	Median	\$500	\$800	\$500	\$400	\$609	\$480	\$500	\$400	\$750	\$975	\$1,200	\$550

Total Expenditures Tracking



YTD=\$1,249.56

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	\$1,171.34	\$1,189.05	\$1,297.83	\$902.14	\$642.19	\$1,096.07	\$1,192.93	\$1,148.47	\$1,293.66	\$1,000.38	\$1,789.48	\$1,239.63
	Median	\$1,105	\$1,146	\$1,194	\$904	\$737	\$1,208	\$1,112	\$1,060	\$1,216	\$961	\$1,758	\$1,153
	Minimum	\$0	\$185	\$0	\$382	\$185	\$185	\$40	\$0	\$67	\$200	\$1,458	\$0
	Maximum	\$3,805	\$2,755	\$3,507	\$1,658	\$1,004	\$1,507	\$2,747	\$3,805	\$2,609	\$2,295	\$2,185	\$3,507

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, Jul, Aug 2013, and Overall Oct-2012 - Sep 2013													
	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Combined Oct-2012 - Sep 2013
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	5	3					1			5			4
Ease of getting around	3				3		5						9
Safety walking around at night			4							6			
Quality of daytime tours								3		4			6
Variety of daytime tours					4								
Quality of nighttime tours													
Variety of nighttime tours										7			10
Quality of shopping	4	4			1	2						2	3
Variety of shopping			5	3									
Price of things on Guam			2						2				11
Quality of hotel accommodations		2		2		3	4		4	3	3	3	2
Quality/cleanliness of air, sky													
Quality/cleanliness of parks													
Quality of landscape in Tumon			1							1	1		7
Quality of landscape in Guam	1	1		1	2	1	3	1	3			1	1
Quality of ground handler			3			4					2		8
Quality/cleanliness of transportation vehicles	2				5		2	2	1	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%	38.0%	49.6%	35.2%	35.4%	43.3%

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 September 2013 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Quality of shopping, and**
 - **Quality of hotel accommodations.**
- With all three factors the overall r^2 is .354 meaning that **35.4% 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, Jul, Aug, Sep 2013 and Overall Oct-2012-Sep 2013													
	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Combined Oct-2012-Sep 2013
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks								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									
Quality of shopping			3	4									3
Variety of shopping													1
Price of things on Guam							1						
Quality of hotel accommodations											1		
Quality/cleanliness of air, sky													
Quality/cleanliness of parks													
Quality of landscape in Tumon													2
Quality of landscape in Guam								2		1			
Quality of ground handler			2					1					4
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%	1.7%	6.7%	0.0%	2.3%	2.7%	0.0%	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 no significant factor in the September 2013 Period.