



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2013 Market Segmentation

#### JULY 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.

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# 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.

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# Highlighted Segments Parameters

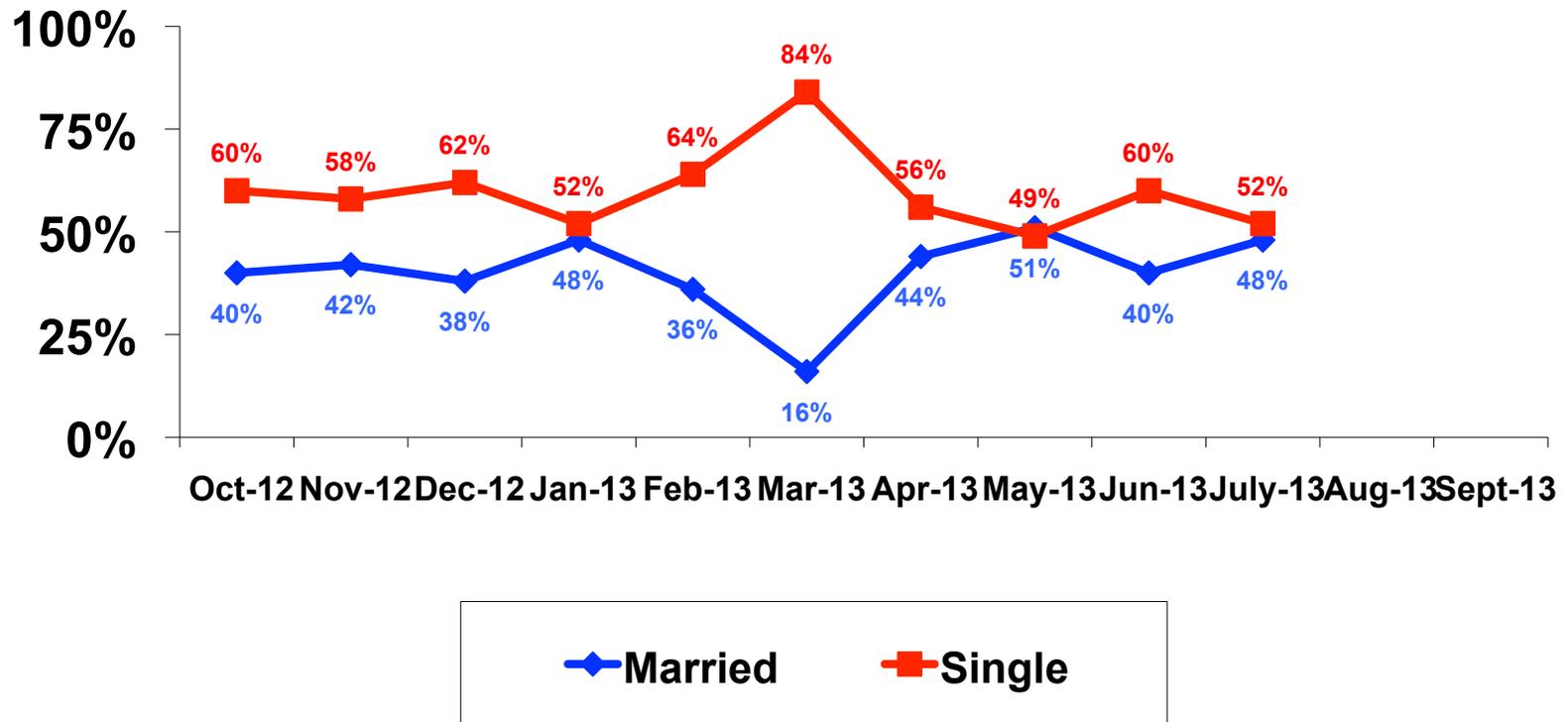
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

# 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
<b>Families</b>	39%	37%	34%	45%	34%	19%	40%	52%	37%	47%		
<b>Office Lady</b>	15%	10%	13%	11%	9%	4%	13%	10%	10%	14%		
<b>Group</b>	3%	3%	2%	3%	3%	9%	1%	4%	3%	3%		
<b>Silver</b>	6%	5%	6%	3%	3%	1%	4%	7%	3%	3%		
<b>Wedding</b>	10%	9%	7%	7%	9%	5%	6%	7%	7%	4%		
<b>Sport</b>	37%	39%	32%	41%	43%	42%	29%	36%	37%	34%		
<b>18-35</b>	67%	72%	69%	62%	80%	85%	62%	59%	73%	64%		
<b>36-55</b>	23%	20%	22%	33%	17%	11%	31%	30%	22%	30%		
<b>Child</b>	13%	9%	13%	21%	12%	6%	19%	13%	9%	17%		
<b>Honeymoon</b>	5%	6%	6%	2%	4%	2%	3%	5%	5%	4%		
<b>Repeat</b>	42%	37%	38%	47%	35%	24%	43%	47%	43%	44%		
<b>TOTAL</b>	<b>351</b>	<b>351</b>	<b>352</b>	<b>351</b>	<b>352</b>	<b>353</b>	<b>351</b>	<b>352</b>	<b>350</b>	<b>352</b>		

# SECTION 1 **PROFILE OF RESPONDENTS**

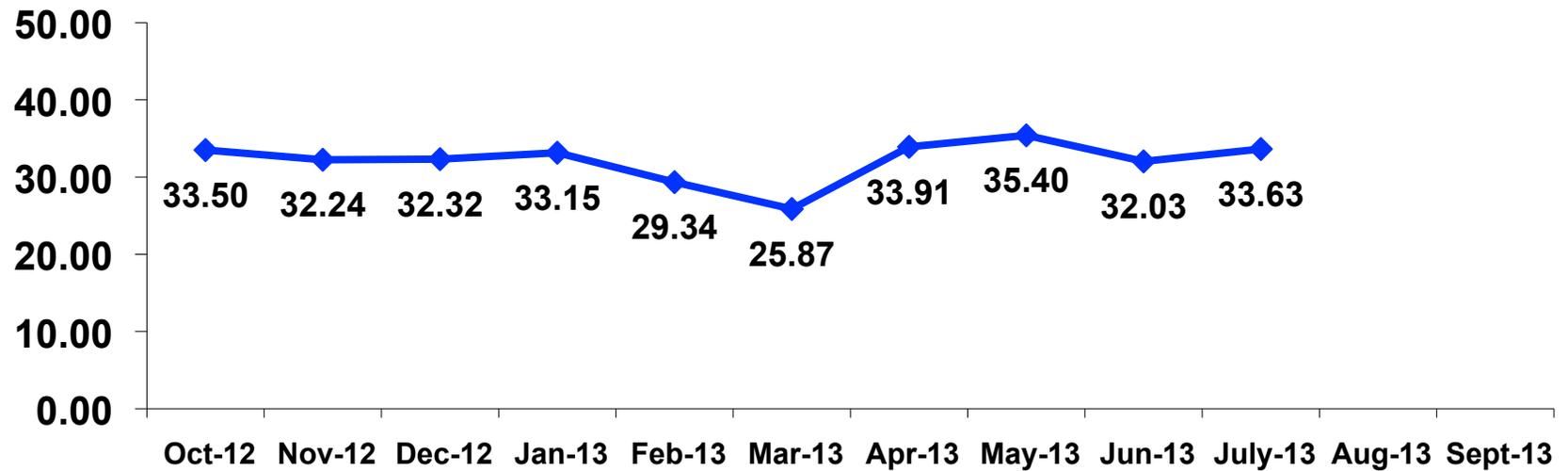
# Marital Status Tracking



# Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	48%	85%	20%	89%	100%	62%	44%	29%	79%	93%	100%	58%
	Single	52%	15%	80%	11%		38%	56%	71%	21%	7%		42%
	Total Count	351	163	49	9	12	13	117	224	104	60	12	155

# Average Age Tracking



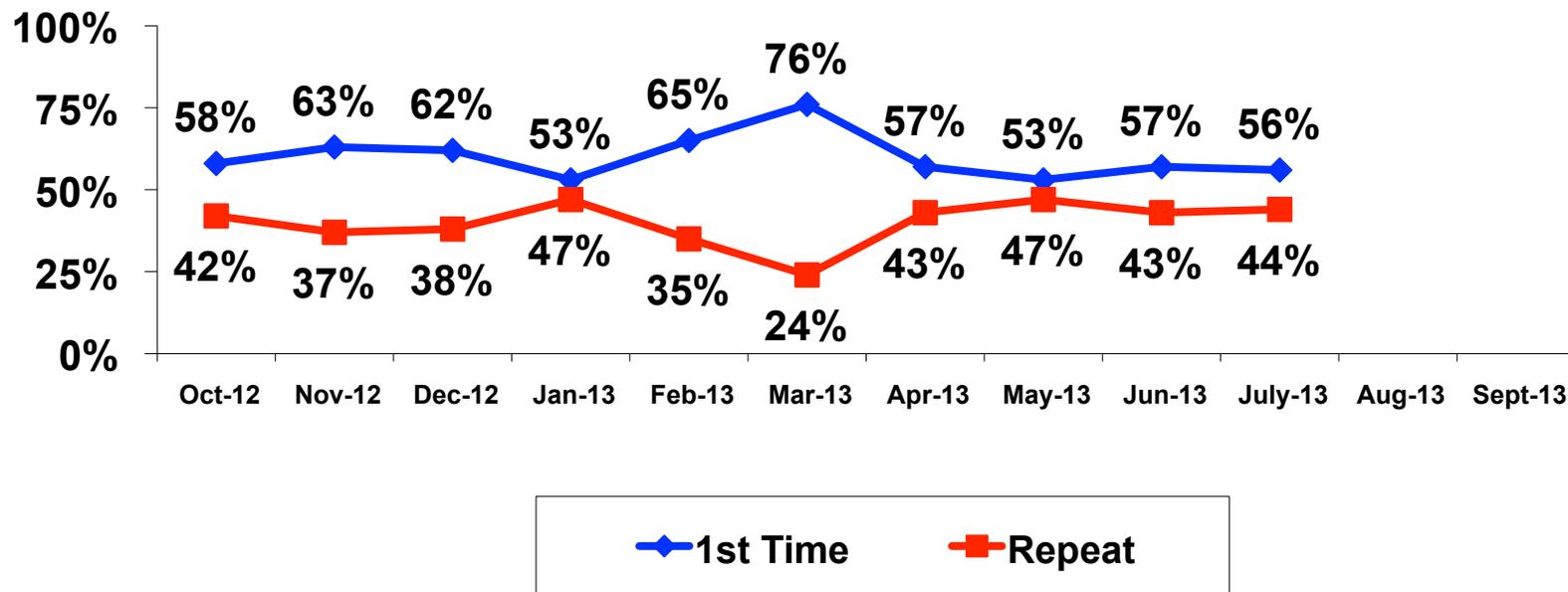
# Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	19%	7%	20%				26%	30%			25%	12%
	25-34	43%	35%	49%	11%		69%	45%	67%		24%	58%	34%
	35-49	29%	40%	29%	78%		23%	24%	3%	89%	64%	17%	41%
	50+	9%	18%	2%	11%	100%	8%	4%		11%	12%		13%
	Total Count	350	162	49	9	12	13	117	224	104	59	12	154
QF	Mean	33.63	38.96	30.63	42.00	63.00	32.38	31.04	26.59	43.11	40.90	27.83	37.33
	Median	30	37	27	43	63	28	27	26	42	40	25	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%				8%	6%	7%		2%		3%	
	Y2.0M-Y3.0M	13%	6%	15%			8%	16%	18%	4%	4%	31%	10%	
	Y3.0M-Y4.0M	16%	11%	27%	11%	10%	31%	10%	21%	7%	4%	31%	11%	
	Y4.0M-Y5.0M	16%	19%	12%		20%	15%	9%	16%	13%	11%	23%	13%	
	Y5.0M-Y7.0M	22%	25%	20%	56%	30%	15%	22%	14%	36%	32%	8%	28%	
	Y7.0M-Y10.0M	14%	20%	7%	22%	20%	8%	12%	9%	19%	25%		16%	
	Y10.0M+	16%	17%	20%	11%	20%	15%	23%	14%	20%	25%	8%	20%	
	No Income	0%						1%	1%					
	Total	Count	316	157	41	9	10	13	108	195	99	57	13	141

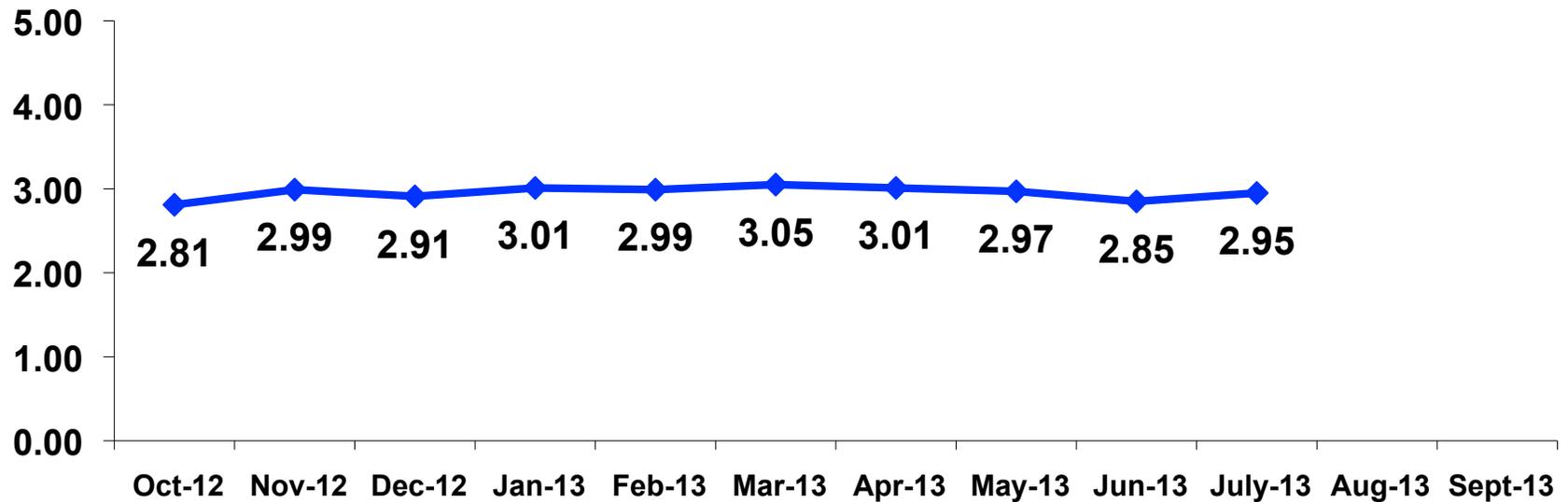
# Prior Trips to Guam Tracking



# Prior Trips to Guam Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	56%	46%	61%	44%	25%	71%	62%	67%	38%	36%	85%	
	No	44%	54%	39%	56%	75%	29%	38%	33%	62%	64%	15%	100%
	Total Count	352	164	49	9	12	14	118	224	104	61	13	155

# 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	2.95	3.24	2.51	3.00	3.67	3.50	2.97	2.84	3.09	3.35	4.08	3.07
	Median	3	3	2	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	60%	58%	57%		50%	43%	60%	66%	49%	44%	62%	55%	
	Full package tour	25%	27%	27%		25%	50%	28%	27%	21%	36%	31%	26%	
	Individually arranged travel (FIT)	8%	10%	2%		25%		8%	6%	12%	16%		12%	
	Company paid travel	4%	2%	12%				2%	0%	11%	2%		4%	
	Group tour	3%	2%	2%	100%			2%	0%	8%	2%		3%	
	Other	0%	1%				7%		0%			8%		
	Total	Count	351	164	49	9	12	14	118	223	104	61	13	155

# Travel Motivation Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	34%	44%	27%	56%	50%	29%	31%	28%	46%	46%	15%	78%	
	Price	33%	34%	27%	11%	25%	14%	36%	33%	29%	36%	23%	32%	
	Visit friends/ Relatives	2%	1%					3%	1%	3%	2%		2%	
	Recomm- friend/family/trvl agnt	17%	9%	16%	11%		7%	21%	22%	10%	7%	15%	9%	
	Scuba	5%	2%	6%				15%	7%	3%			4%	
	Water sports	23%	21%	27%		17%		41%	28%	13%	21%	38%	19%	
	Short travel time	51%	66%	53%	11%	58%	21%	53%	51%	48%	70%	46%	55%	
	Golf	1%	1%	2%				3%	1%	2%			2%	
	Relax	36%	34%	31%	33%	25%		37%	38%	32%	26%	15%	37%	
	Company/ Business Trip	8%	5%	16%	56%			3%	3%	19%	3%	8%	8%	
	Company Sponsored	1%			11%					2%			1%	
	Safe	21%	26%	22%	22%	17%		19%	20%	24%	33%	8%	26%	
	Natural beauty	57%	60%	55%	22%	33%	29%	63%	60%	52%	61%	38%	57%	
	Shopping	37%	32%	39%	11%	33%	21%	43%	45%	21%	30%	38%	36%	
	Married/ Attn wedding	4%	7%	4%		8%	100%	2%	5%	1%	3%	31%	3%	
	Honeymoon	4%	8%				29%	6%	4%	2%	3%	100%	1%	
	Pleasure	56%	55%	49%	22%	50%	14%	59%	59%	48%	49%	38%	55%	
	Organized sports	1%	1%			8%			0%				2%	
	Other	2%	3%		11%	8%				5%	7%		4%	
	Total	Count	352	164	49	9	12	14	118	224	104	61	13	155

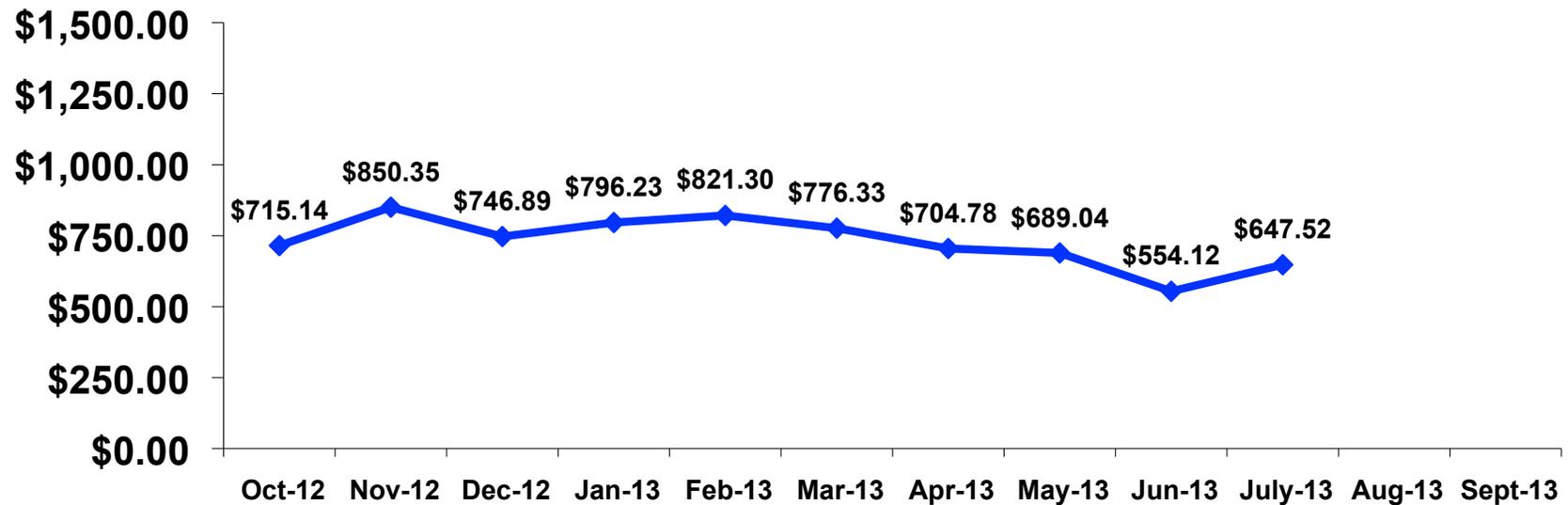
# Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	76%	79%	80%	67%	58%	79%	78%	77%	75%	75%	77%	75%	
	Travel Guidebook- Bookstore	55%	54%	61%	67%	50%	43%	58%	56%	57%	59%	46%	51%	
	Travel Agent Brochure	43%	44%	45%	44%	58%	43%	47%	41%	44%	39%	15%	37%	
	Magazine (Consumer)	40%	40%	37%	44%	17%	43%	47%	46%	32%	34%	54%	35%	
	Prior Trip	36%	44%	33%	56%	50%	29%	34%	27%	54%	49%	15%	81%	
	Friend/ Relative	27%	21%	39%	22%	17%	43%	34%	33%	17%	25%	23%	16%	
	TV	11%	10%	14%	11%	8%	14%	15%	10%	13%	10%	15%	7%	
	Consumer Trvl Show	4%	3%	4%		8%	7%	5%	4%	4%	3%		6%	
	Co-Worker/ Company Trvl Dept	2%	2%	6%	11%			2%	3%	1%		8%		
	GVB Promo	1%	1%		11%			1%	0%	2%			1%	
	Newspaper	1%	1%	4%			7%	1%	1%	1%			1%	
	GVB Office	1%	1%	2%				1%	1%				1%	
	Other	0%								1%				
	Total	Count	352	164	49	9	12	14	118	224	104	61	13	155

# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures Tracking

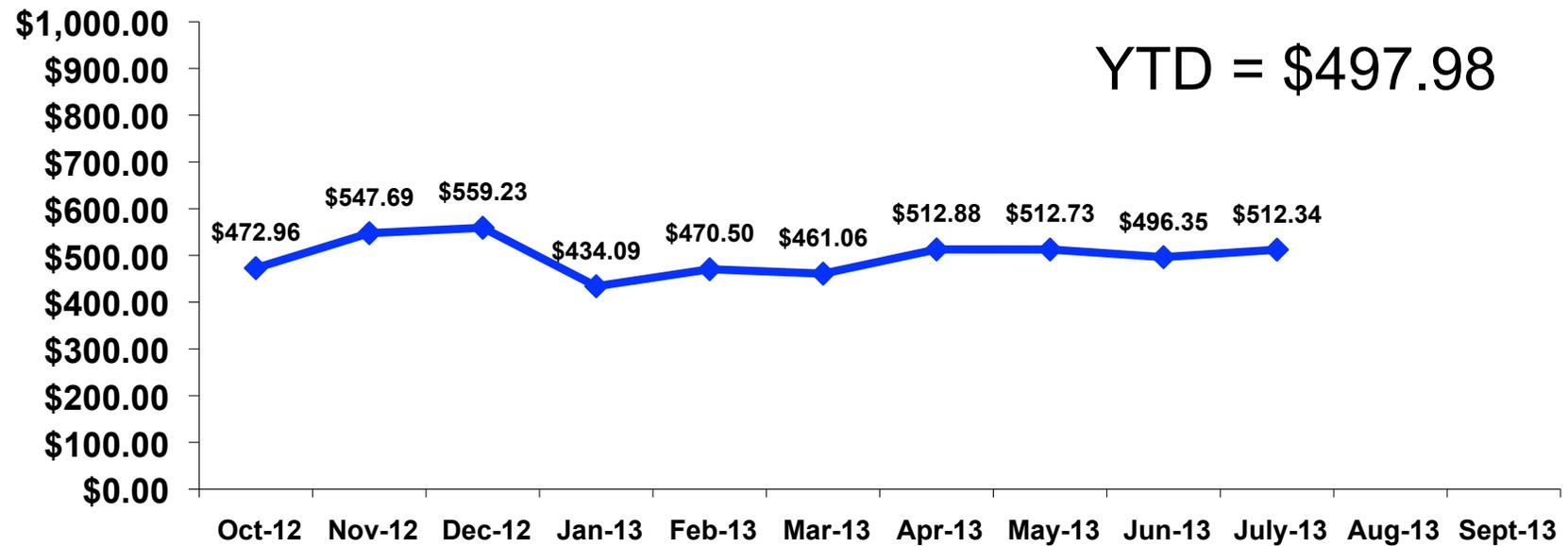
YTD=\$730.22



# 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	\$647.52	\$684.06	\$613.34	\$376.00	\$859.19	\$804.11	\$719.87	\$686.69	\$556.66	\$716.47	\$892.68	\$614.62
	Median	\$601	\$700	\$598	\$135	\$825	\$900	\$700	\$660	\$510	\$707	\$850	\$590
	Minimum	\$0	\$0	\$0	\$0	\$80	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$1,899	\$1,824	\$1,500	\$1,000	\$1,824	\$1,666	\$1,899	\$1,899	\$1,666	\$1,824	\$1,666	\$1,824

# On-Island Expenditures Tracking



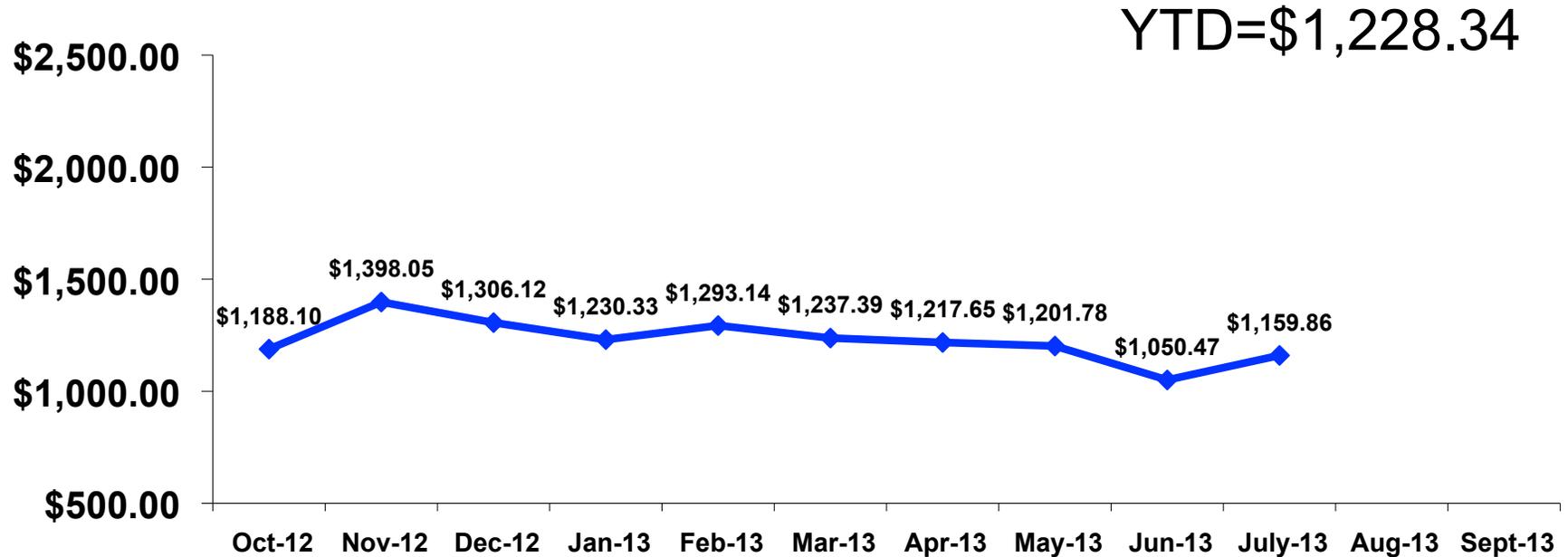
# On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$512.34	\$405.46	\$530.69	\$465.33	\$484.46	\$519.17	\$611.58	\$560.42	\$431.26	\$350.33	\$803.99	\$491.95
	Median	\$395	\$300	\$440	\$490	\$280	\$450	\$453	\$423	\$333	\$267	\$833	\$350
	Minimum	\$0	\$0	\$0	\$0	\$60	\$55	\$0	\$0	\$0	\$0	\$200	\$0
	Maximum	\$5,000	\$2,000	\$2,000	\$800	\$2,000	\$1,100	\$5,000	\$5,000	\$3,000	\$2,000	\$1,750	\$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	\$41.49	\$62.85	\$14.08	\$6.89	\$169.17	\$64.29	\$38.87	\$33.10	\$43.49	\$80.84	\$39.54	\$49.32
	Median	\$0	\$0	\$0	\$0	\$55	\$15	\$0	\$0	\$0	\$10	\$0	\$0
F&B FF/STORE	Mean	\$33.95	\$43.54	\$33.14	\$7.67	\$64.75	\$13.93	\$30.81	\$29.58	\$38.72	\$49.89	\$37.54	\$36.27
	Median	\$10	\$20	\$19	\$0	\$25	\$0	\$10	\$0	\$20	\$20	\$0	\$10
F&B RESTRNT	Mean	\$89.28	\$132.27	\$45.24	\$22.22	\$172.50	\$135.71	\$90.93	\$78.54	\$105.85	\$141.64	\$237.85	\$91.15
	Median	\$40	\$100	\$0	\$0	\$80	\$80	\$40	\$30	\$50	\$80	\$150	\$50
OPT TOUR	Mean	\$75.38	\$87.57	\$69.98	\$32.22	\$50.00	\$72.86	\$104.81	\$67.00	\$95.83	\$74.10	\$239.54	\$81.84
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$44	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$204.53	\$266.92	\$145.96	\$47.78	\$155.00	\$252.86	\$254.31	\$193.37	\$252.39	\$334.03	\$490.46	\$209.52
	Median	\$50	\$100	\$100	\$0	\$0	\$0	\$100	\$50	\$65	\$100	\$40	\$70
GIFT- OTHER	Mean	\$139.77	\$147.76	\$88.02	\$125.33	\$265.83	\$203.57	\$173.63	\$135.81	\$140.56	\$153.80	\$139.54	\$136.11
	Median	\$50	\$100	\$50	\$8	\$135	\$100	\$50	\$50	\$75	\$100	\$100	\$50
TRANS	Mean	\$21.52	\$28.07	\$10.82	\$20.00	\$135.00	\$61.43	\$17.22	\$19.06	\$15.02	\$38.87	\$66.85	\$23.98
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$211.45	\$225.40	\$182.51	\$239.89	\$325.00	\$194.64	\$174.16	\$208.38	\$208.90	\$327.70	\$320.77	\$265.11
	Median	\$0	\$0	\$0	\$200	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$813.11	\$990.54	\$591.80	\$504.22	\$1,262.25	\$1,006.43	\$884.75	\$763.69	\$897.49	\$1,194.97	\$1,572.08	\$888.26
	Median	\$600	\$800	\$500	\$500	\$820	\$1,000	\$635	\$515	\$610	\$1,000	\$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	\$1,159.86	\$1,089.52	\$1,144.03	\$841.33	\$1,343.65	\$1,323.28	\$1,331.45	\$1,247.11	\$987.92	\$1,066.79	\$1,696.67	\$1,106.57
	Median	\$1,000	\$1,000	\$1,000	\$700	\$1,241	\$1,266	\$1,200	\$1,120	\$890	\$1,000	\$1,750	\$1,002
	Minimum	\$0	\$0	\$150	\$250	\$140	\$55	\$83	\$0	\$0	\$0	\$300	\$0
	Maximum	\$5,400	\$3,166	\$2,500	\$1,698	\$3,166	\$2,500	\$5,400	\$5,400	\$3,480	\$3,166	\$2,750	\$4,500

SECTION 4  
**ADVANCED STATISTICS**

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# 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 2013, and Overall Oct-2012 - Jul 2013											
	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Combine d Oct-2012 - Jul 2013
Drivers:	rank										
Quality & Cleanliness of beaches & parks	5	3					1			5	5
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	
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	3	2
Quality/cleanliness of air, sky											
Quality/cleanliness of parks											
Quality of landscape in Tumon			1							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	2	4
% 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%	44.2%

NOTE: Only significant drivers are included.

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# Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by seven significant factors in the July 2013 Period. By rank order they are:
  - **Quality of landscape in Tumon,**
  - **Quality/cleanliness of transportation vehicles,**
  - **Quality of hotel accommodations,**
  - **Quality of day time tours,**
  - **Quality & cleanliness of beaches & parks,**
  - **Safety walking around at night, and**
  - **Variety of night time tours.**
- With all seven factors the overall  $r^2$  is .496 meaning that **49.6% 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 2013 and Overall Oct-2012-Jul 2013											
	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Combined Oct-2012-Jul 2013
Drivers:	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							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											2
Quality of landscape in Tumon											
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%	1.7%

NOTE: Only significant drivers are included.

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# Drivers of Per Person On-Island Expenditure

- **Per Person On Island Expenditure** of Japanese visitors on Guam is driven by one significant factor in the July 2013 Period. That factor is:
  - **Quality of landscape in Guam**
- With that factor the overall  $r^2$  is .023 meaning that **2.3% of overall satisfaction is accounted for by this factor.**