



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013 Market Segmentation

OCTOBER 2012



Prepared by: QMark Research

*Information contained herein is the property of the Guam Visitors Bureau.
The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.*

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

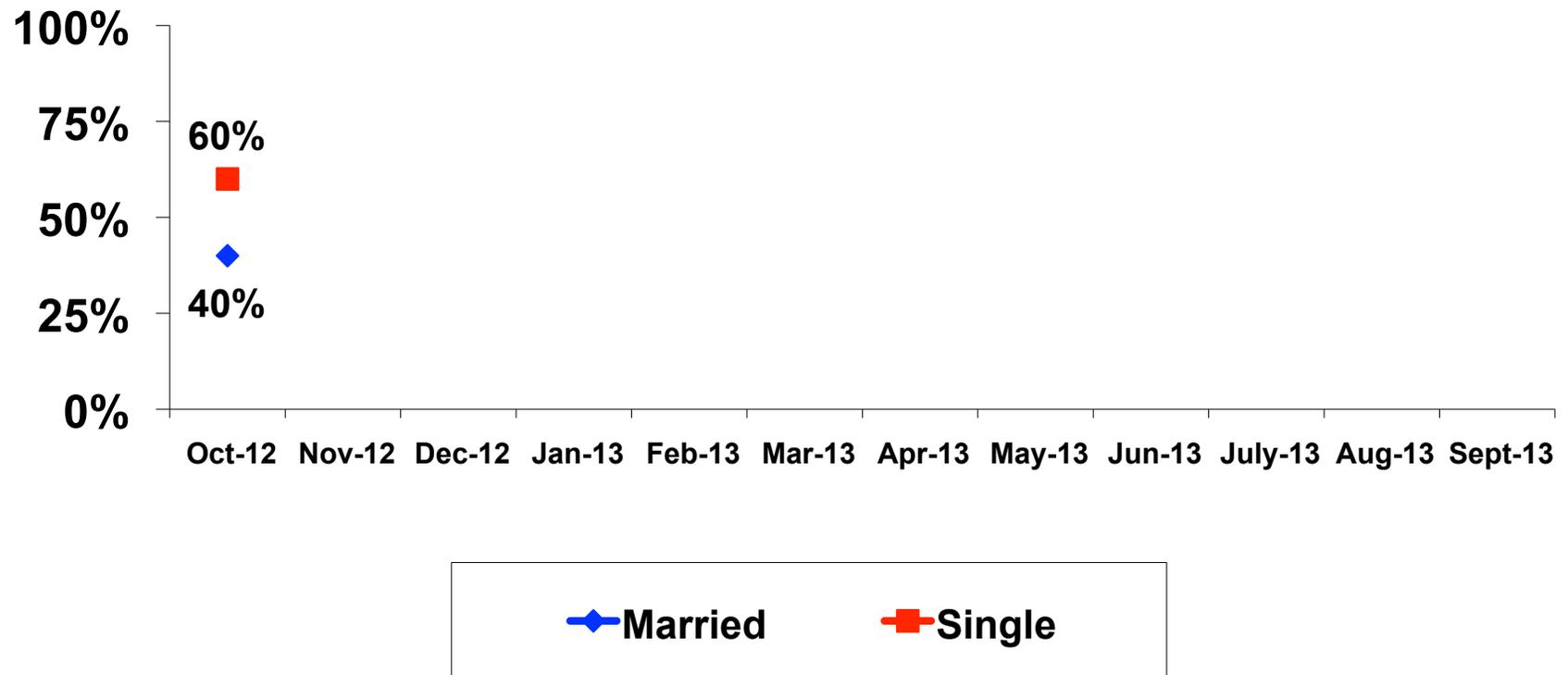
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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

SECTION 1
PROFILE OF RESPONDENTS

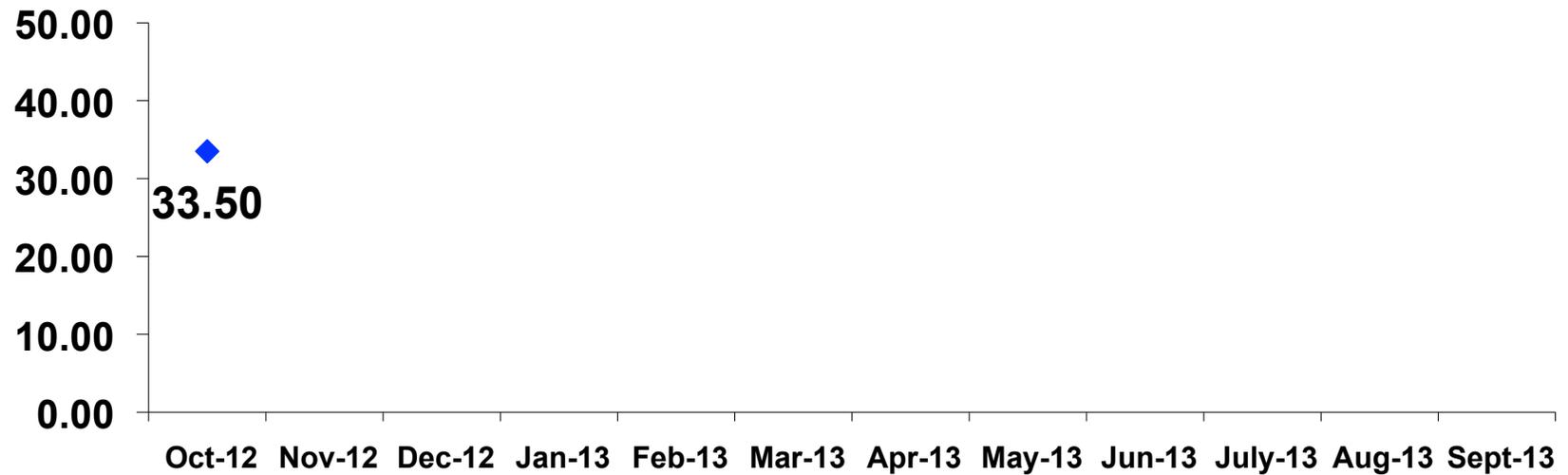
Marital Status Tracking



Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	40%	81%	16%	11%	100%	67%	32%	22%	70%	84%	94%	41%
	Single	60%	19%	84%	89%		33%	68%	78%	30%	16%	6%	59%
	Total Count	349	135	51	9	21	33	130	236	81	44	17	146

Average Age Tracking



Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOO N	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	27%	13%	20%	33%			35%	39%		7%	18%	15%
	25-34	39%	36%	49%	33%		52%	43%	58%		36%	65%	40%
	35-49	22%	31%	25%	22%		27%	16%	3%	86%	50%	12%	33%
	50+	12%	20%	6%	11%	100%	21%	5%		14%	7%	6%	12%
	Total Count	349	135	51	9	21	33	130	236	81	44	17	146
QF	Mean	33.50	38.31	32.06	30.44	63.24	38.73	29.37	26.47	42.98	37.77	30.29	35.84
	Median	30	35	29	28	63	34	27	26	42	38	28	33

Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	6%	2%	6%	33%			8%	9%	1%	3%		6%
	Y2.0M-Y3.0M	14%	9%	22%	33%	6%	26%	13%	17%	7%	10%	7%	12%
	Y3.0M-Y4.0M	17%	13%	29%		17%	16%	18%	19%	14%	13%	36%	12%
	Y4.0M-Y5.0M	13%	12%	10%		22%		18%	15%	8%	10%	21%	13%
	Y5.0M-Y7.0M	20%	26%	22%	17%	28%	16%	15%	17%	24%	33%	21%	27%
	Y7.0M-Y10.0M	14%	21%	8%		17%	26%	9%	8%	26%	18%	7%	16%
	Y10.0M+	14%	16%	2%	17%	11%	16%	16%	11%	20%	15%	7%	15%
	No Income	2%						3%	3%				1%
	Total Count	311	123	49	6	18	31	117	206	76	40	14	135

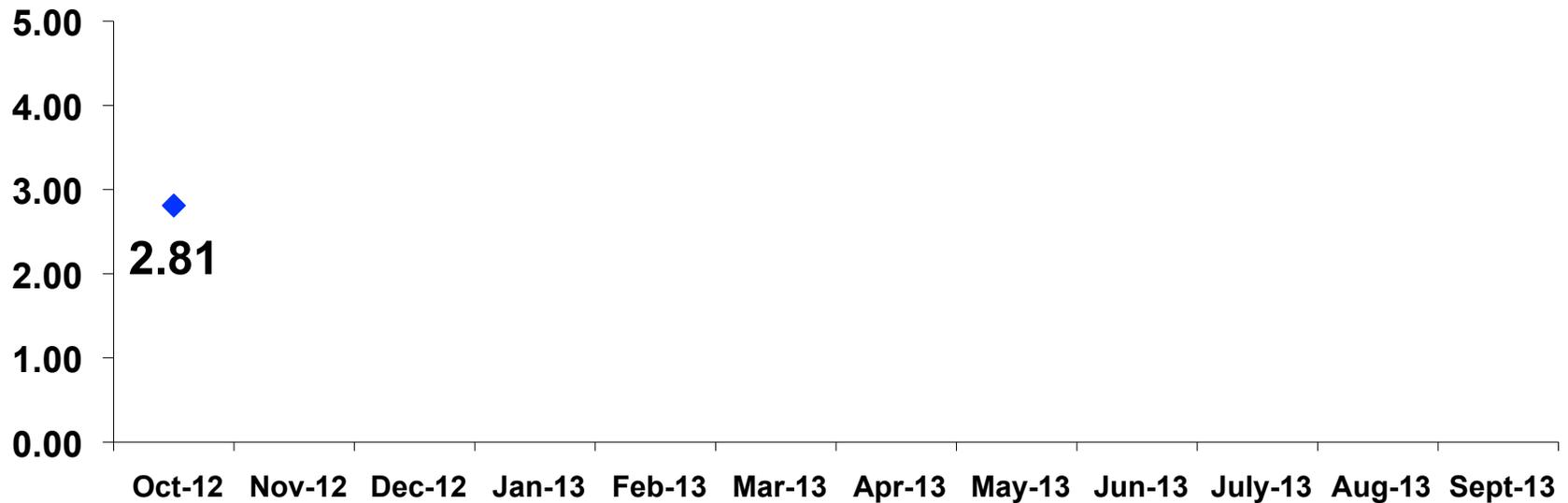
Prior Trips to Guam Tracking



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	58%	58%	43%	56%	57%	61%	68%	64%	40%	57%	82%	
	No	42%	42%	57%	44%	43%	39%	32%	36%	60%	43%	18%	100%
	Total Count	347	132	51	9	21	33	129	232	81	44	17	147

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	2.81	2.94	2.68	2.56	2.75	2.82	2.95	2.78	2.94	3.00	3.13	2.81
	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	62%	53%	80%		43%	44%	64%	63%	68%	51%	41%	68%	
	Full package tour	24%	34%	12%		29%	35%	24%	26%	19%	29%	53%	17%	
	Individually arranged travel (FIT)	7%	11%	4%		14%	6%	9%	5%	11%	18%		10%	
	Group tour	3%		2%	100%			2%	3%	1%			3%	
	Company paid travel	2%				10%		1%	1%	1%			2%	
	Other	2%	2%	2%		5%	15%	1%	2%		2%	6%	1%	
	Total	Count	350	136	51	9	21	34	129	235	81	45	17	147

Travel Motivation Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q5A	Previous trip	30%	34%	39%	22%	29%	24%	27%	28%	40%	36%	12%	73%
	Price	31%	28%	35%	22%	29%		35%	34%	22%	20%	24%	27%
	Visit friends/ Relatives	2%	1%					4%	2%	4%	2%		1%
	Reconnun- friend/family/trvl agnt	25%	18%	20%	11%	19%		31%	30%	15%	11%	12%	16%
	Scuba	7%	4%	8%				13%	9%	6%		6%	7%
	Water sports	17%	15%	14%	11%	5%		35%	22%	7%	20%	24%	7%
	Short travel time	50%	51%	69%	11%	48%	6%	52%	48%	57%	51%	59%	54%
	Golf	1%	1%					1%	1%	1%			1%
	Relax	37%	40%	39%	11%	38%	3%	38%	35%	44%	36%	12%	39%
	Company/ Business Trip	6%	1%	4%	56%	10%		3%	5%	9%			7%
	Company Sponsored	2%	1%		33%			1%	2%	1%	2%		1%
	Safe	19%	20%	22%	22%	24%	6%	21%	19%	21%	20%	29%	20%
	Natural beauty	50%	47%	53%	11%	38%		60%	55%	42%	53%	35%	46%
	Shopping	37%	38%	61%	22%	24%	12%	38%	38%	40%	33%	18%	37%
	Career Cert/ Testing	1%				5%			1%				1%
	Married/ Attn wedding	10%	15%	8%		14%	100%	3%	7%	14%	16%	12%	9%
	Honeymoon	5%	12%	4%			6%	5%	6%	2%	2%	100%	2%
	Pleasure	46%	42%	53%	11%	24%	15%	51%	49%	42%	38%	24%	45%
	Organized sports	1%	1%	2%		5%		2%	1%				1%
	Other	2%	5%	4%		10%			0%	6%	9%		2%
	Total	Count	351	136	51	9	21	34	130	236	81	45	17

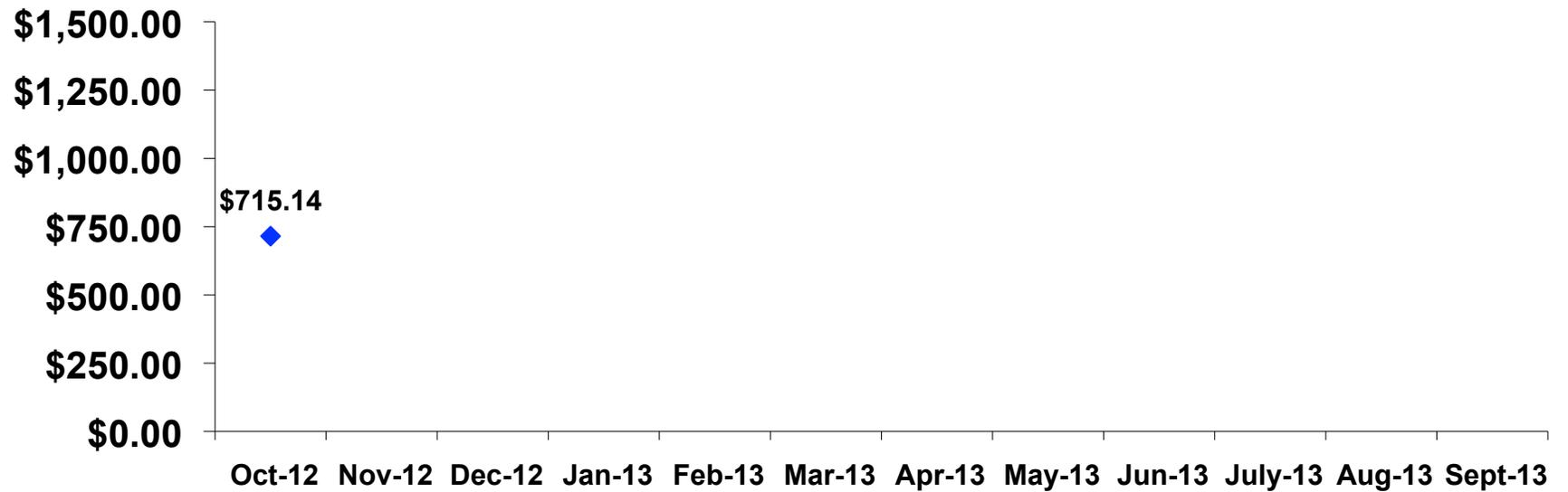
Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q1	Internet	67%	71%	71%	33%	43%	56%	69%	69%	73%	73%	41%	71%
	Travel Guidebook- Bookstore	56%	54%	65%	67%	48%	47%	55%	57%	56%	53%	59%	56%
	Travel Agent Brochure	47%	47%	57%	67%	33%	38%	53%	53%	32%	31%	82%	39%
	Friend/ Relative	36%	32%	27%	22%	29%	32%	42%	40%	27%	31%	59%	23%
	Magazine (Consumer)	34%	38%	31%	22%	24%	41%	40%	35%	31%	36%	29%	22%
	Prior Trip	32%	32%	47%	22%	33%	35%	25%	26%	48%	31%	18%	77%
	TV	10%	8%	14%		5%	3%	15%	11%	9%	7%	12%	8%
	Co-Worker/ Company Trvl Dept	4%	1%	6%	33%			5%	4%	6%	2%		3%
	Consumer Trvl Show	3%	3%			10%		2%	3%		4%		2%
	Newspaper	3%	2%	2%				5%	3%	2%			
	GVB Office	1%	1%			5%		1%	0%				1%
	GVB Promo	1%	1%	4%					0%	1%			1%
	Travel Trade Show	0%							0%				
	Radio	0%						1%	0%			6%	1%
	Total	Count	351	136	51	9	21	34	130	236	81	45	17

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

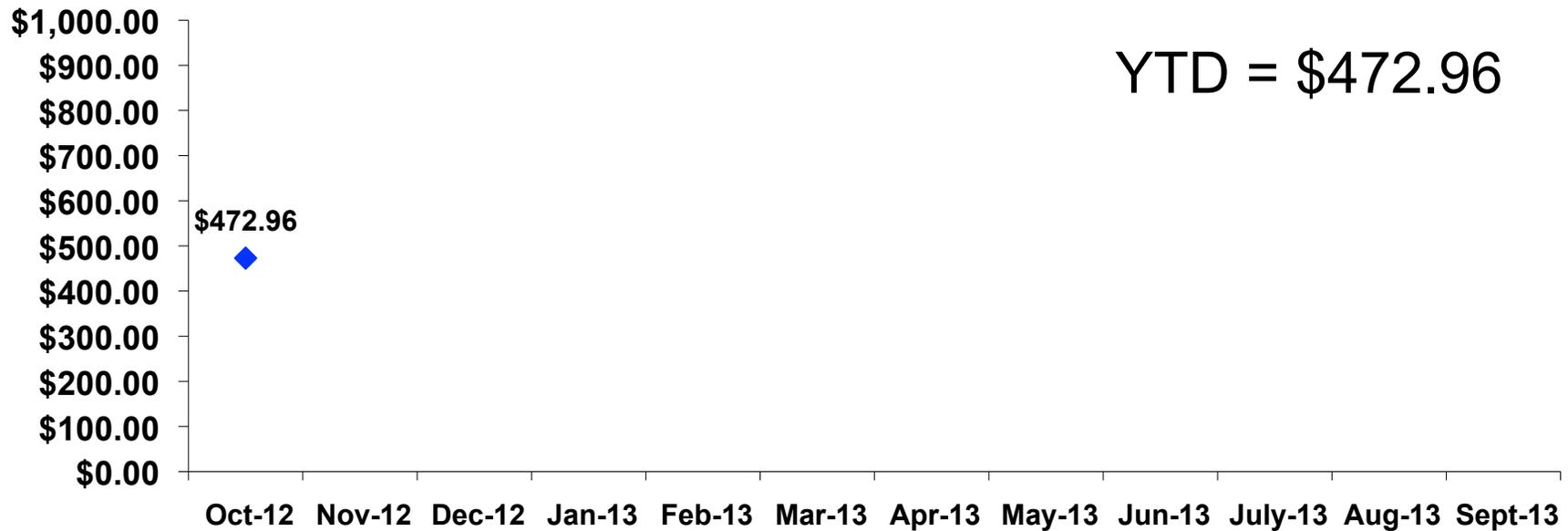
YTD=\$715.14



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	\$715.14	\$838.56	\$741.57	\$86.26	\$555.82	\$667.92	\$812.82	\$736.80	\$722.09	\$732.41	\$1,392.13	\$686.06
	Median	\$663	\$710	\$704	\$0	\$503	\$534	\$754	\$666	\$670	\$628	\$1,288	\$666
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$4,188	\$4,188	\$2,010	\$377	\$1,947	\$4,188	\$3,141	\$4,188	\$1,884	\$2,513	\$4,188	\$2,010

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	\$472.96	\$411.51	\$471.00	\$299.44	\$342.14	\$353.77	\$463.50	\$481.43	\$500.00	\$362.11	\$537.78	\$549.17
	Median	\$350	\$300	\$400	\$200	\$235	\$245	\$400	\$371	\$350	\$255	\$500	\$400
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,000	\$2,500	\$1,700	\$965	\$1,800	\$1,500	\$2,240	\$4,163	\$5,000	\$1,725	\$2,240	\$5,000

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	\$30.95	\$49.11	\$7.84	\$14.44	\$23.57	\$27.65	\$31.45	\$26.69	\$44.68	\$85.98	\$29.29	\$37.97
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$26.97	\$33.50	\$21.65	\$16.11	\$7.86	\$11.97	\$20.21	\$21.59	\$47.37	\$50.04	\$27.00	\$31.88
	Median	\$5	\$0	\$10	\$0	\$0	\$0	\$0	\$5	\$10	\$0	\$0	\$10
F&B RESTRNT	Mean	\$61.90	\$63.72	\$65.67	\$17.22	\$80.48	\$38.38	\$56.42	\$51.40	\$91.43	\$57.80	\$45.29	\$79.35
	Median	\$0	\$0	\$0	\$0	\$20	\$0	\$0	\$0	\$30	\$0	\$0	\$35
OPT TOUR	Mean	\$58.47	\$65.01	\$52.27	\$23.89	\$26.67	\$59.41	\$69.25	\$54.13	\$82.74	\$79.62	\$64.59	\$62.10
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$237.70	\$276.41	\$278.82	\$171.11	\$181.19	\$131.56	\$240.32	\$218.83	\$322.60	\$395.49	\$358.82	\$321.38
	Median	\$50	\$50	\$150	\$0	\$20	\$3	\$50	\$35	\$100	\$50	\$100	\$100
GIFT- OTHER	Mean	\$122.83	\$150.61	\$103.47	\$35.56	\$135.67	\$102.27	\$141.10	\$120.75	\$128.43	\$144.98	\$243.76	\$133.43
	Median	\$50	\$60	\$85	\$0	\$20	\$20	\$65	\$50	\$50	\$100	\$100	\$60
TRANS	Mean	\$10.63	\$12.28	\$7.02	\$0.00	\$6.71	\$6.18	\$9.85	\$8.69	\$18.30	\$19.24	\$2.18	\$14.32
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$140.95	\$204.03	\$32.55	\$38.89	\$94.05	\$111.91	\$138.01	\$147.88	\$135.43	\$204.56	\$154.24	\$126.69
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$683.69	\$853.19	\$551.65	\$317.22	\$556.19	\$484.85	\$711.07	\$644.17	\$860.37	\$1,037.71	\$925.18	\$789.54
	Median	\$500	\$600	\$450	\$240	\$300	\$400	\$500	\$475	\$600	\$750	\$500	\$550

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	\$1,188.10	\$1,250.07	\$1,212.57	\$385.71	\$897.96	\$1,021.69	\$1,276.32	\$1,218.23	\$1,222.10	\$1,094.53	\$1,929.92	\$1,235.23
	Median	\$1,128	\$1,165	\$1,174	\$400	\$971	\$788	\$1,204	\$1,130	\$1,067	\$883	\$2,264	\$1,088
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$50	\$0	\$0
	Maximum	\$5,503	\$4,254	\$3,010	\$990	\$2,002	\$4,254	\$4,027	\$4,720	\$5,503	\$2,618	\$4,254	\$5,503

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.

Drivers of Overall Satisfaction, October 2012	
Drivers:	rank
Quality & Cleanliness of beaches & parks	5
Ease of getting around	3
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	4
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	1
Quality of ground handler	
Quality/cleanliness of transportation vehicles	2
% of Overall Satisfaction Accounted For	54.7%
NOTE: Only significant drivers are included.	

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by five significant factors in the October 2012 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Quality/cleanliness of transportation vehicles,**
 - **Ease of getting around,**
 - **Quality of shopping, and**
 - **Quality/cleanliness of beaches & parks.**
- With all five factors the overall r^2 is .547 meaning that **54.7% of overall satisfaction is accounted for by these five factors.**

Drivers of Per Person On Island Expenditures, Oct 2012	
Drivers:	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%
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 October 2012 Period.