



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013 Market Segmentation

APRIL 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

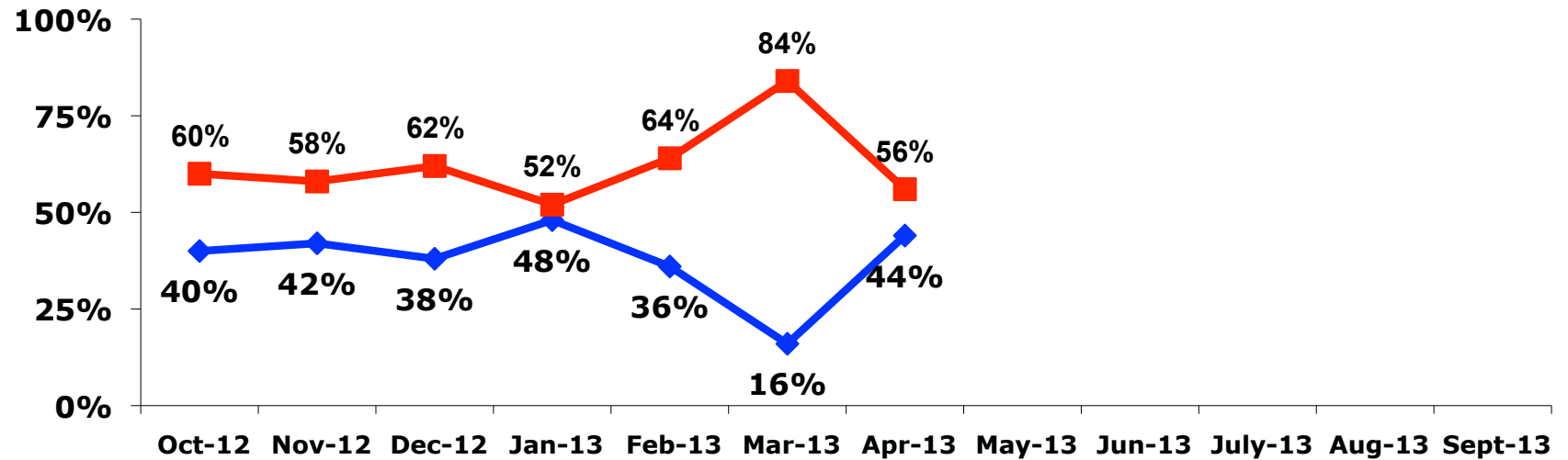
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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

SECTION 1
PROFILE OF RESPONDENTS

Marital Status Tracking

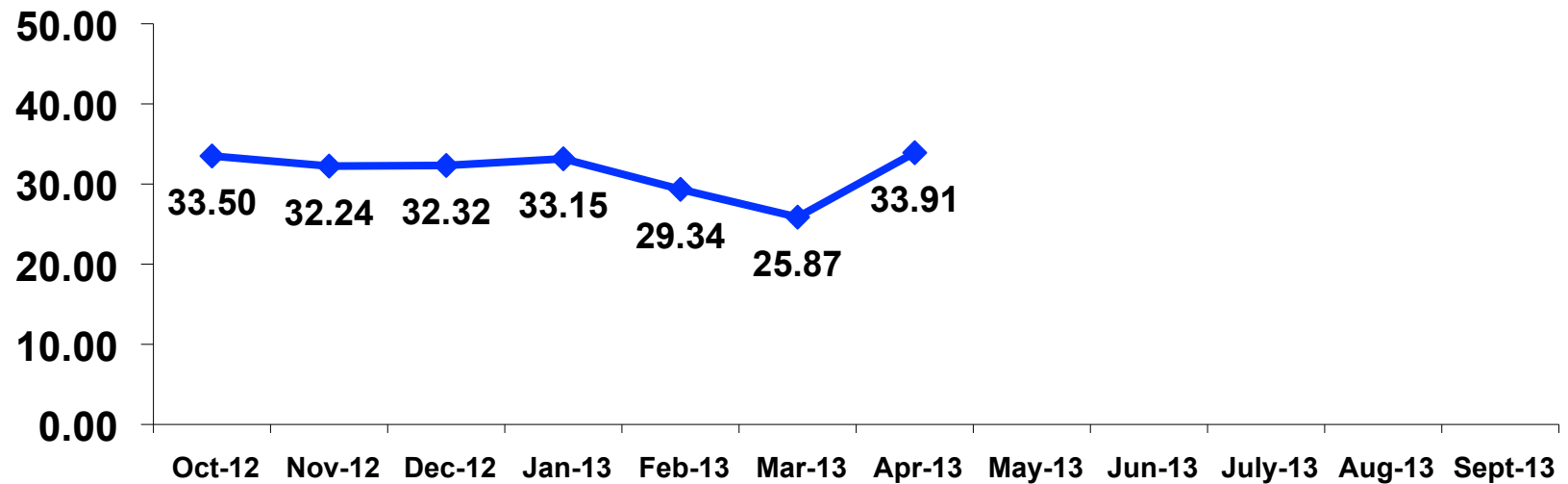


◆ Married ■ Single

Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	44%	85%	7%	25%	100%	70%	45%	21%	80%	97%	100%	51%
	Single	56%	15%	93%	75%		30%	55%	79%	20%	3%		49%
	Total Count	349	139	46	4	15	20	101	216	110	67	10	148

Average Age Tracking



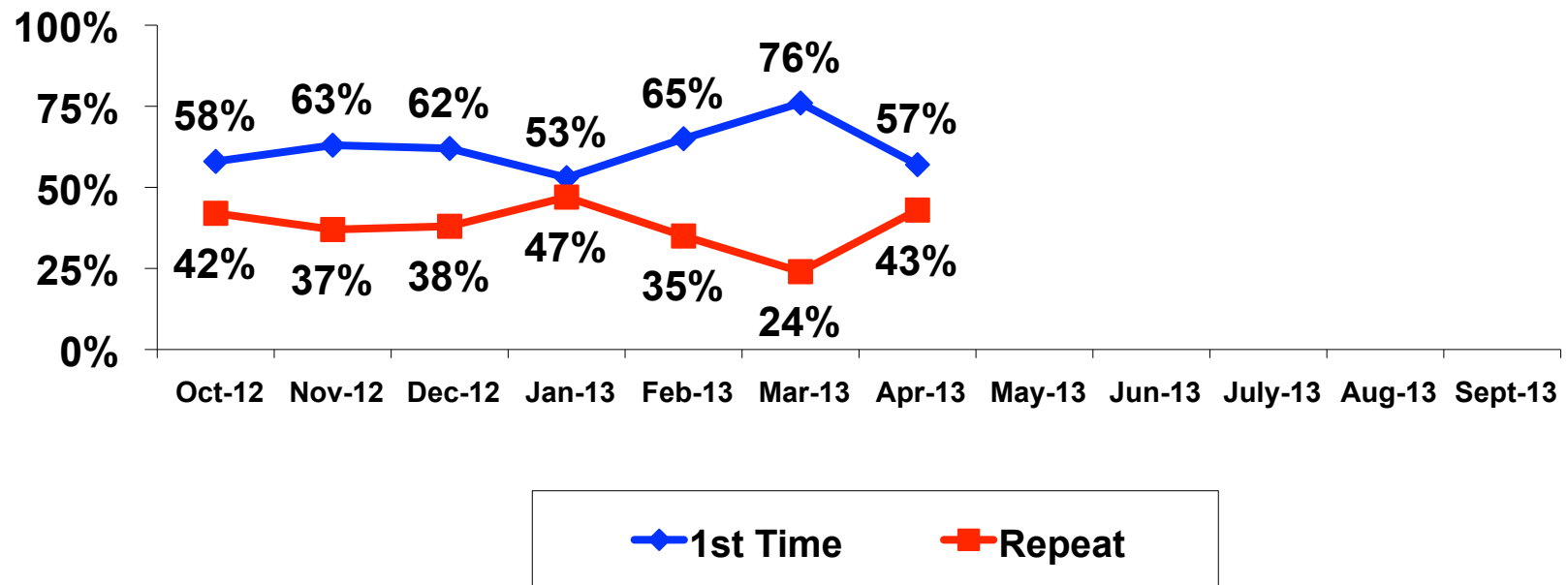
Age Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	22%	9%	13%	75%		5%	29%	35%		2%	20%	16%
	25-34	38%	26%	73%			60%	33%	61%		17%	70%	29%
	35-49	28%	46%	9%	25%		10%	26%	3%	82%	68%	10%	42%
	50+	12%	20%	4%		100%	25%	12%		18%	14%		13%
Total	Count	347	138	45	4	15	20	100	217	110	66	10	147
QF	Mean	33.91	40.33	28.78	23.75	65.07	37.40	34.07	26.00	44.16	42.50	27.30	36.63
	Median	30	42	27	20	63	31	30	26	44	43	27	37

Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q26	<Y2.0 million	7%	2%	7%			5%	8%	10%	1%			6%	
	Y2.0M-Y3.0M	11%	6%	38%	25%	7%	5%	10%	18%	2%		13%	5%	
	Y3.0M-Y4.0M	17%	9%	29%		13%	11%	14%	23%	8%	2%	25%	19%	
	Y4.0M-Y5.0M	12%	13%	9%		7%	26%	7%	14%	11%	13%	25%	11%	
	Y5.0M-Y7.0M	20%	29%	2%	75%	33%	26%	20%	14%	29%	40%	38%	20%	
	Y7.0M-Y10.0M	16%	22%	9%		20%	16%	26%	11%	25%	19%		16%	
	Y10.0M+	16%	20%	7%		20%	11%	14%	10%	25%	27%		24%	
	No Income	1%						1%	1%				1%	
	Total	Count	318	133	45	4	15	19	90	188	110	63	8	133

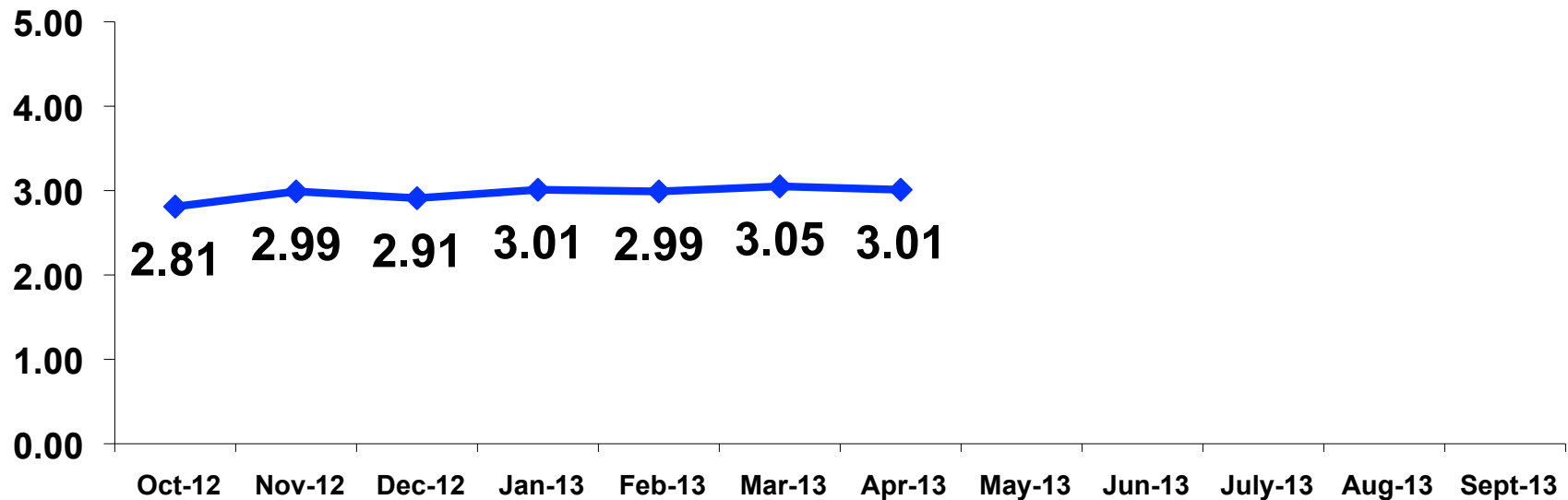
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	57%	54%	75%	75%	80%	65%	65%	69%	33%	42%	89%	
	No	43%	46%	25%	25%	20%	35%	35%	31%	67%	58%	11%	100%
	Total Count	347	138	44	4	15	20	99	213	110	67	9	150

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	3.09	3.13	2.75	3.20	3.00	2.99	3.00	2.99	3.13	3.00	3.16
	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	60%	53%	61%		47%	30%	64%	63%	59%	46%	50%	59%	
	Full package tour	32%	39%	37%		53%	65%	29%	30%	31%	43%	40%	27%	
	Individually arranged travel (FIT)	5%	8%	2%			5%	4%	4%	8%	10%	10%	9%	
	Company paid travel	1%						1%	1%	2%			3%	
	Group tour	1%			100%			2%	2%				1%	
	Other	0%						0%	0%				1%	
	Total	Count	349	140	46	4	15	20	101	215	110	67	10	150

Travel Motivation Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	29%	32%	22%		14%	15%	22%	20%	48%	48%	10%	67%	
	Price	34%	33%	33%	25%	21%		44%	32%	41%	36%	30%	36%	
	Visit friends/ Relatives	1%	2%			7%		1%	1%	1%	1%		1%	
	Recomm- friend/family/trvl agnt	19%	13%	11%	75%	43%	15%	22%	21%	11%	7%		10%	
	Scuba	3%	2%	2%				8%	3%	2%	1%		3%	
	Water sports	23%	23%	33%		36%	5%	42%	24%	22%	27%	20%	18%	
	Short travel time	52%	65%	51%	50%	57%	5%	54%	47%	63%	75%	80%	52%	
	Golf	3%	4%			14%	5%	9%	2%	3%	3%		3%	
	Relax	37%	39%	33%	25%	43%	5%	44%	36%	39%	43%	30%	37%	
	Company/ Business Trip	3%						3%	3%	4%			6%	
	Safe	27%	29%	29%	25%	21%	10%	28%	25%	31%	33%	40%	27%	
	Natural beauty	64%	66%	71%	25%	57%	20%	72%	68%	60%	69%	80%	55%	
	Shopping	39%	36%	47%	25%		15%	32%	45%	32%	31%	40%	34%	
	Married/ Attn wedding	6%	9%	4%		14%	100%	4%	6%	4%	4%		5%	
	Honeymoon	3%	7%	2%				3%	5%		1%	100%	1%	
	Pleasure	55%	49%	64%	50%	29%	5%	67%	60%	49%	55%	60%	53%	
	Organized sports	2%	1%	7%				1%	2%	3%			1%	
	Other	3%	2%	2%				4%	5%	2%	4%		4%	
	Total	Count	349	140	45	4	14	20	101	217	110	67	10	150

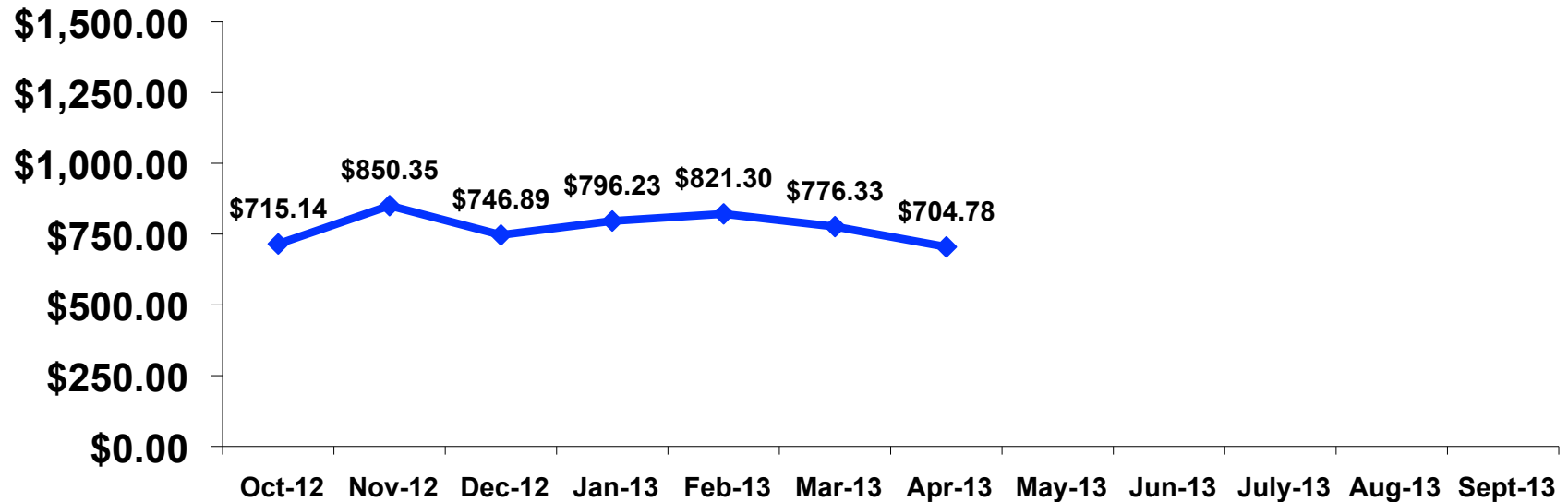
Information Sources Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q1	Internet	77%	73%	85%	75%	60%	70%	86%	80%	72%	73%	80%	78%
	Travel Guidebook- Bookstore	53%	60%	65%	50%	40%	75%	52%	57%	48%	61%	60%	43%
	Travel Agent Brochure	45%	52%	50%		73%	35%	48%	46%	40%	51%	80%	32%
	Magazine (Consumer)	37%	42%	39%	25%	33%	40%	37%	42%	26%	37%	80%	26%
	Prior Trip	32%	37%	24%		20%	15%	27%	22%	52%	52%	10%	74%
	Friend/ Relative	29%	19%	33%	25%	27%	20%	27%	36%	15%	13%	20%	22%
	TV	17%	17%	15%	25%	20%	15%	18%	20%	12%	13%	10%	16%
	Consumer Trvl Show	5%	3%	7%	25%		10%	10%	5%	5%	3%	10%	5%
	Co-Worker/ Company Trvl Dept	3%	3%	2%	25%	7%	5%	4%	2%	4%	3%		3%
	GVB Office	1%	2%	2%				1%	1%	2%	4%		3%
	Newspaper	1%				7%			0%	1%			1%
	Travel Trade Show	1%						2%	1%				1%
	GVB Promo	0%							0%				1%
	Total	Count	349	139	46	4	15	20	100	215	110	67	148

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

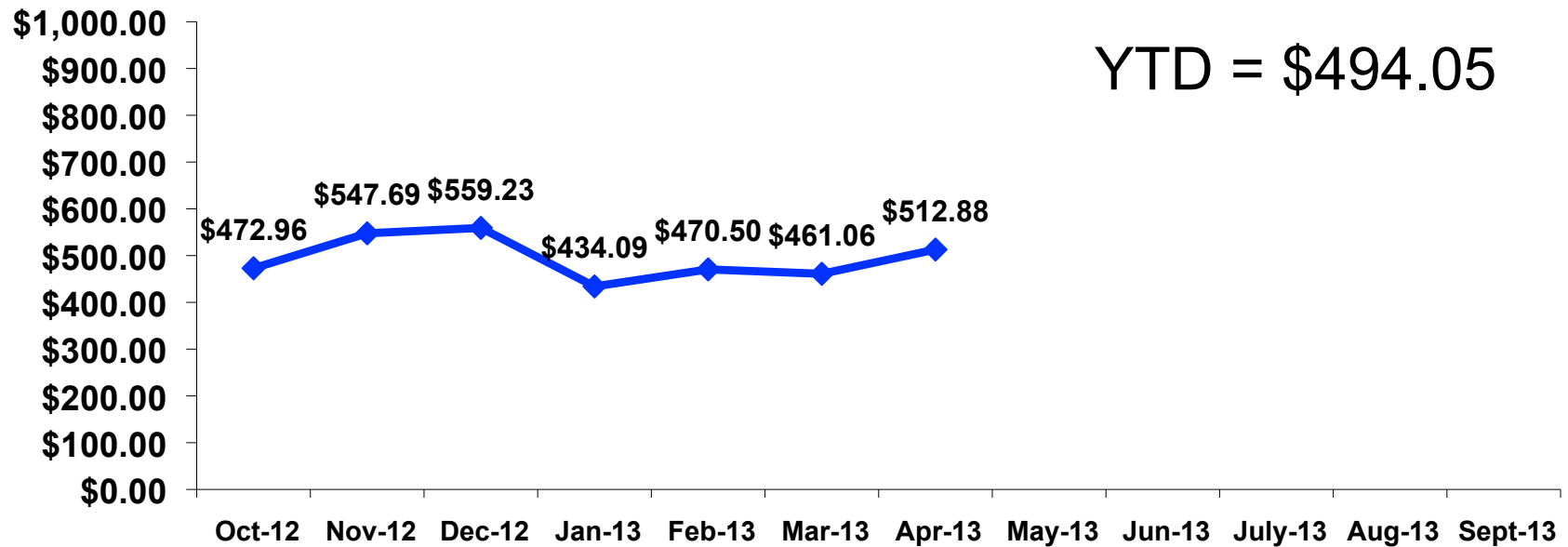
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Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$704.78	\$860.26	\$709.11	\$497.35	\$880.06	\$958.58	\$747.77	\$654.74	\$785.28	\$858.89	\$1,141.80	\$634.47
	Median	\$611	\$764	\$661	\$479	\$903	\$724	\$659	\$611	\$685	\$849	\$866	\$561
	Minimum	\$0	\$0	\$0	\$459	\$0	\$0	\$0	\$0	\$0	\$0	\$442	\$0
	Maximum	\$5,096	\$5,096	\$1,853	\$573	\$1,594	\$5,096	\$3,720	\$3,720	\$5,096	\$1,711	\$3,720	\$3,720

On-Island Expenditures Tracking



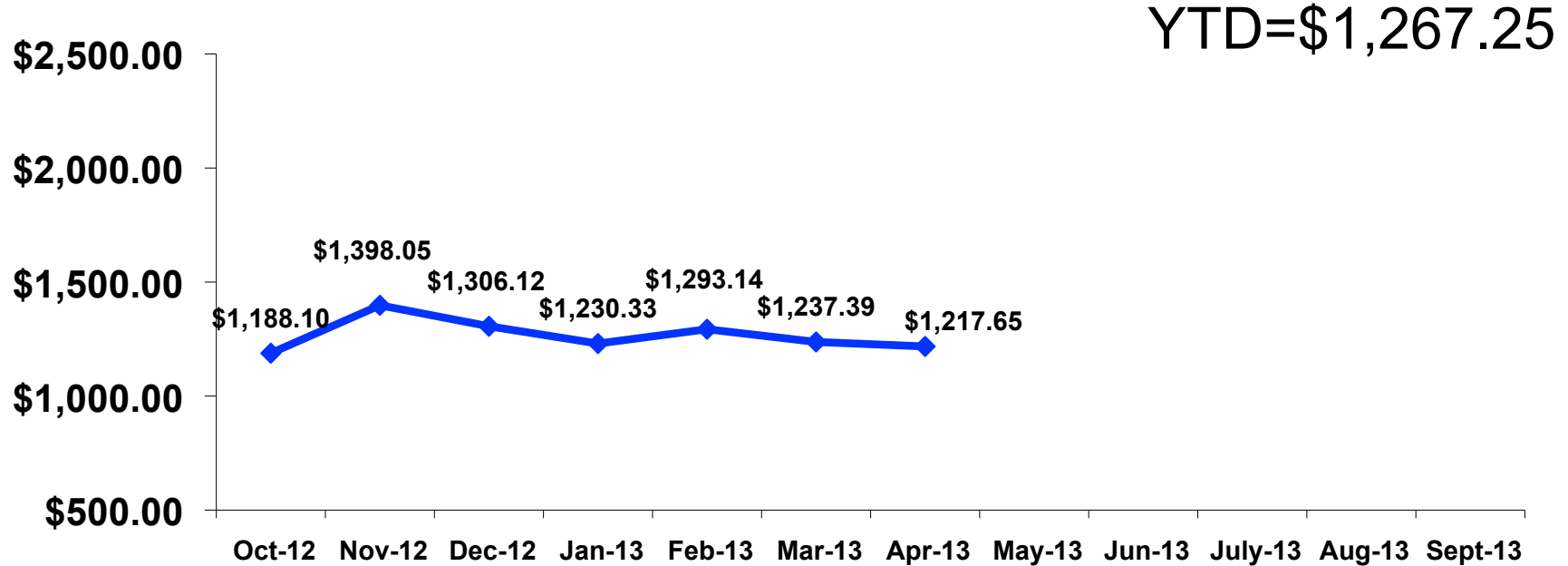
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$512.88	\$433.80	\$459.07	\$301.50	\$384.68	\$330.55	\$474.69	\$509.27	\$557.04	\$427.44	\$415.33	\$535.61
	Median	\$400	\$326	\$375	\$298	\$318	\$292	\$400	\$425	\$400	\$267	\$463	\$400
	Minimum	\$0	\$0	\$0	\$60	\$233	\$0	\$0	\$0	\$0	\$50	\$50	\$0
	Maximum	\$8,000	\$3,750	\$1,700	\$550	\$1,000	\$800	\$2,000	\$3,000	\$8,000	\$3,750	\$750	\$8,000

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	\$66.21	\$139.84	\$10.57	\$15.50	\$96.40	\$21.50	\$47.53	\$19.85	\$158.00	\$201.67	\$86.00	\$60.43
	Median	\$0	\$0	\$0	\$6	\$100	\$0	\$0	\$0	\$0	\$40	\$110	\$0
F&B FF/STORE	Mean	\$37.73	\$50.63	\$17.35	\$34.25	\$41.33	\$19.65	\$31.89	\$19.89	\$72.64	\$72.99	\$28.00	\$45.05
	Median	\$10	\$18	\$0	\$31	\$10	\$0	\$10	\$0	\$30	\$30	\$20	\$10
F&B RESTRNT	Mean	\$84.13	\$108.99	\$28.70	\$62.50	\$153.67	\$48.75	\$112.19	\$53.05	\$133.83	\$151.24	\$25.00	\$105.42
	Median	\$20	\$25	\$0	\$20	\$100	\$0	\$30	\$0	\$100	\$100	\$0	\$43
OPT TOUR	Mean	\$74.32	\$79.94	\$37.15	\$49.25	\$135.40	\$29.00	\$105.40	\$65.12	\$87.25	\$97.72	\$81.00	\$72.59
	Median	\$0	\$0	\$0	\$24	\$17	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$264.87	\$370.36	\$100.89	\$81.50	\$182.53	\$53.60	\$211.89	\$171.72	\$472.74	\$549.70	\$94.00	\$349.57
	Median	\$50	\$100	\$0	\$88	\$50	\$5	\$40	\$30	\$100	\$100	\$20	\$75
GIFT- OTHER	Mean	\$145.80	\$216.54	\$93.89	\$68.00	\$166.67	\$120.00	\$157.01	\$107.27	\$220.21	\$306.94	\$378.00	\$109.82
	Median	\$68	\$100	\$60	\$36	\$100	\$0	\$85	\$40	\$100	\$100	\$165	\$73
TRANS	Mean	\$19.68	\$18.56	\$6.85	\$9.50	\$4.00	\$19.00	\$29.47	\$14.47	\$33.84	\$25.60	\$27.00	\$28.60
	Median	\$0	\$0	\$0	\$9	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$180.77	\$174.14	\$202.02	\$41.00	\$208.87	\$303.00	\$158.71	\$194.10	\$149.96	\$156.94	\$169.00	\$189.91
	Median	\$0	\$0	\$0	\$10	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$867.59	\$1,151.71	\$495.02	\$361.50	\$928.87	\$614.50	\$842.31	\$644.13	\$1,316.86	\$1,546.37	\$888.00	\$953.93
	Median	\$572	\$800	\$428	\$300	\$600	\$500	\$550	\$500	\$805	\$1,000	\$925	\$586

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	\$1,217.65	\$1,294.06	\$1,168.18	\$798.85	\$1,264.73	\$1,289.14	\$1,222.46	\$1,164.01	\$1,342.32	\$1,286.33	\$1,557.13	\$1,170.08
	Median	\$1,018	\$1,137	\$1,036	\$777	\$1,221	\$1,021	\$1,115	\$1,014	\$1,108	\$1,142	\$1,292	\$999
	Minimum	\$0	\$0	\$0	\$633	\$500	\$0	\$0	\$0	\$300	\$95	\$611	\$0
	Maximum	\$8,561	\$5,846	\$2,475	\$1,009	\$2,172	\$5,846	\$3,920	\$3,920	\$8,561	\$4,965	\$3,920	\$8,561

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 2013, and Overall Oct-2012 - Apr 2013								
	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	Combined Oct-2012 - Apr 2013
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	5	3					1	4
Ease of getting around	3				3		5	7
Safety walking around at night			4					
Quality of daytime tours								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
Quality of ground handler			3			4		5
Quality/cleanliness of transportation vehicles	2				5		2	8
% of Per Person On Island Expenditures Accounted For	54.7%	50.6%	45.2%	42.4%	41.5%	40.1%	46.3%	45.1%

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 April 2013 Period. By rank order they are:
 - **Quality & Cleanliness of beaches and parks,**
 - **Quality/cleanliness of transportation vehicles,**
 - **Quality of landscape in Guam**
 - **Quality of hotel accommodations, and**
 - **Ease of getting around.**
- With all five factors the overall r^2 is .463 meaning that **46.3% of overall satisfaction is accounted for by these five factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2012, Jan, Feb, Mar, Apr 2013 and Overall Oct-2012-Apr 2013								
	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	Combined Oct-2012-Apr 2013
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks								
Ease of getting around			1					
Safety walking around at night								4
Quality of daytime tours								
Variety of daytime tours				1				3
Quality of nighttime tours				2				
Variety of nighttime tours				3				
Quality of shopping			3	4				2
Variety of shopping								
Price of things on Guam							1	5
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			2					
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%	1.2%

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 one significant factor in the April 2013 Period. That factor is:
 - **Price of things on Guam.**
- With this factor the overall r^2 is .017 meaning that **1.7% of Per Person On Island Expenditure is accounted for by this factor.**