



GUAM VISITORS BUREAU
Japan Visitor Tracker Exit Profile
FY2012 MARKET SEGMENTATION –
APRIL 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 **326** 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 **326** is +/- 5.4 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 +/- 5.4 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

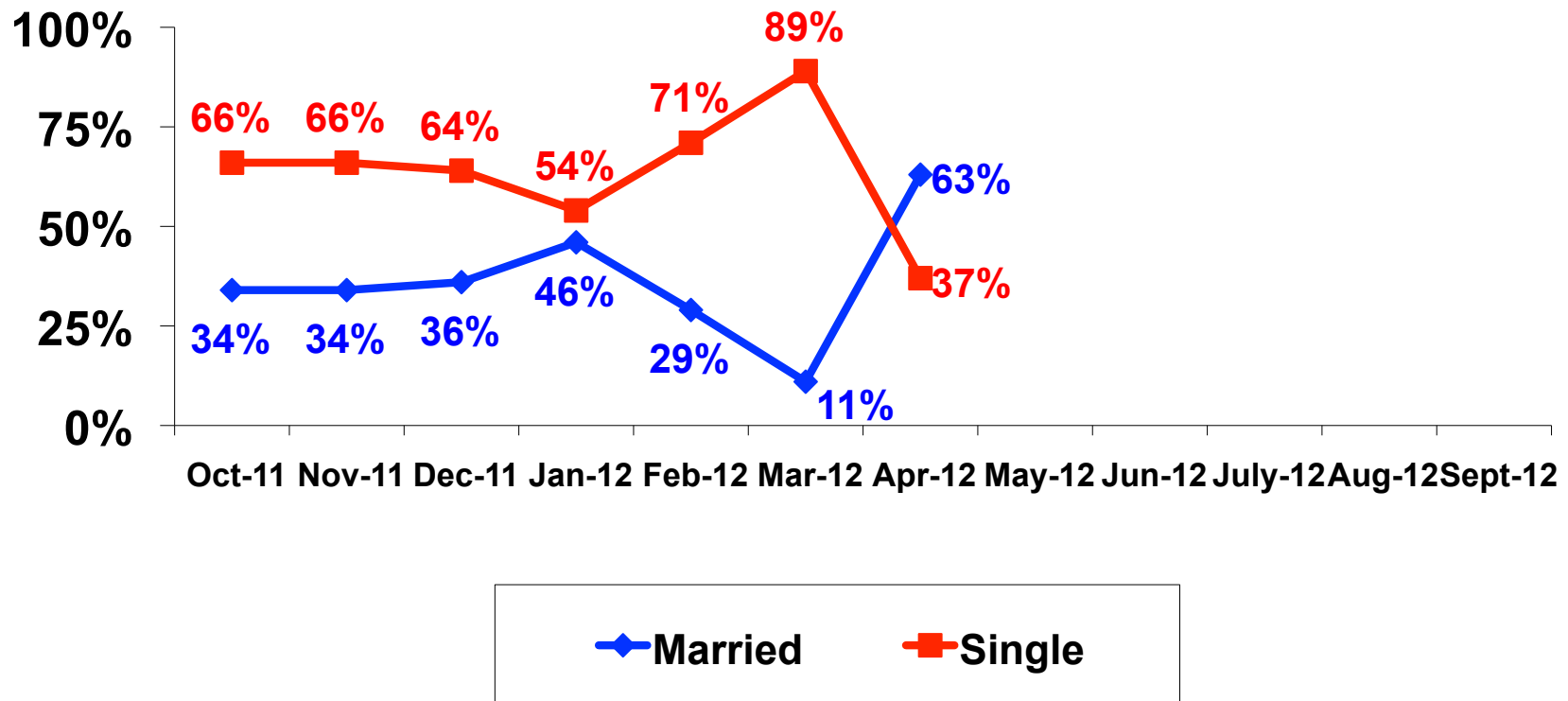
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.18/Q.19/Q.28
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

Highlighted Segments

	Oct 11	Nov 11	Dec 11	Jan 12	Feb 12	Mar 12	Apr 12	May 12	Jun 12	July 12	Aug 12	Sept 12
Families	15%	16%	18%	32%	14%	10%	43%					
Office Lady	14%	10%	11%	13%	7%	6%	8%					
Group	3%	2%	2%	3%	6%	4%	3%					
Silver	2%	2%	4%	2%	2%	1%	5%					
Wedding	4%	7%	4%	4%	3%	5%	10%					
Sport	67%	69%	58%	68%	68%	73%	64%					
18-35	77%	82%	69%	59%	79%	92%	47%					
36-55	19%	15%	27%	36%	18%	7%	46%					
Child	6%	7%	10%	17%	6%	3%	32%					
Honeymoon	6%	7%	5%	3%	4%	2%	4%					
Repeat	33%	36%	43%	47%	35%	22%	47%					
TOTAL	326	325	327	327	327	328	326					

SECTION 1 **PROFILE OF RESPONDENTS**

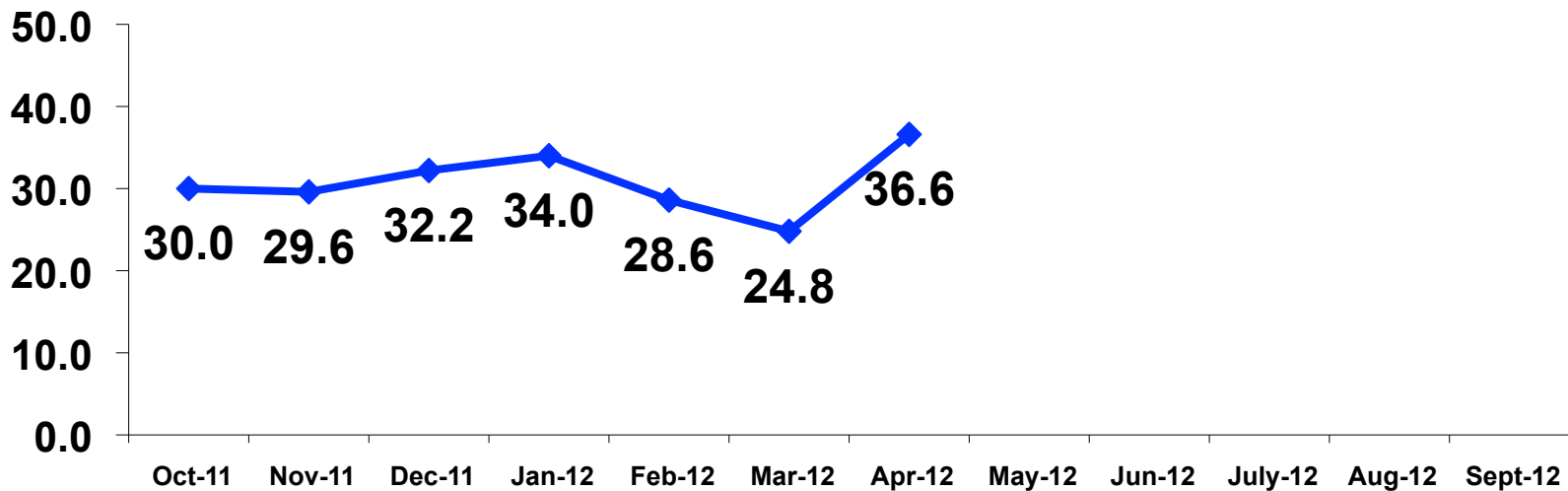
Marital Status Tracking



Marital Status Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT	
C. Married	Count	205	117	11	6	14	23	125	49	137	101	13	114
	Col %	63%	84%	41%	60%	93%	74%	60%	32%	91%	96%	100%	75%
Single	Count	121	22	16	4	1	8	85	105	14	4		39
	Col %	37%	16%	59%	40%	7%	26%	40%	68%	9%	4%		25%
Total	Count	326	139	27	10	15	31	210	154	151	105	13	153

Average Age Tracking



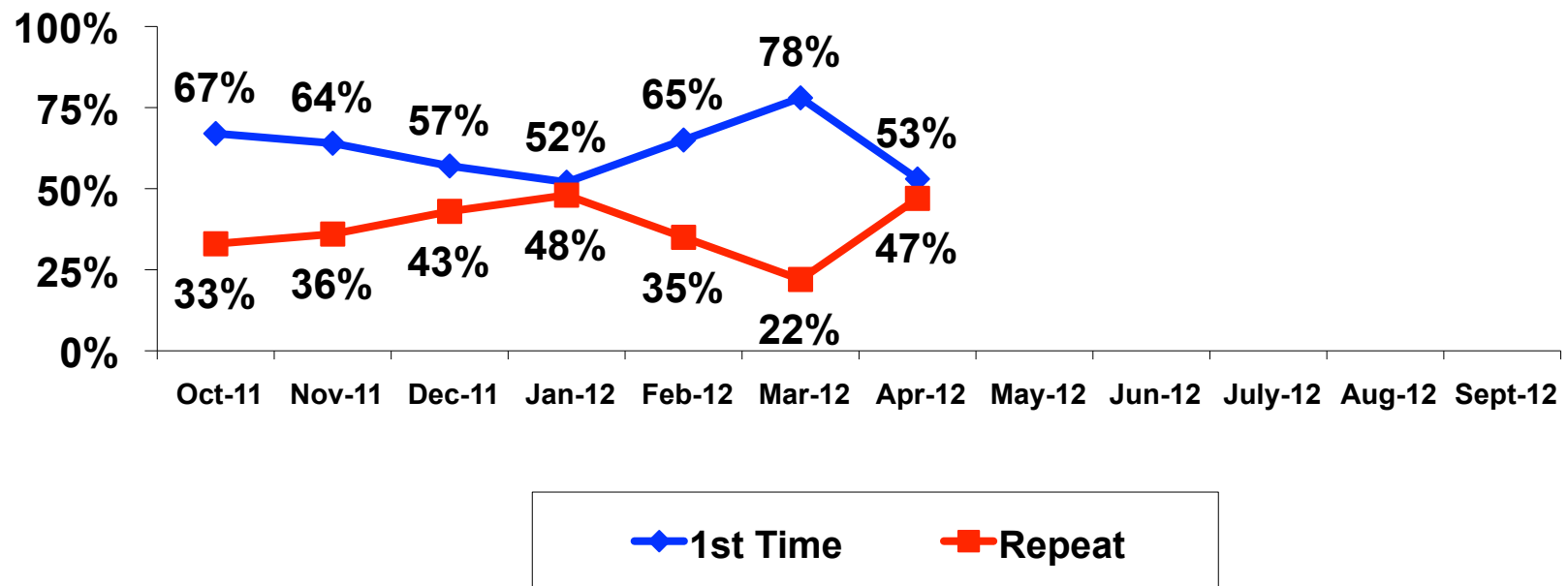
Age Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
D.	18-34	Count	148	35	13	4		13	101	148		10	9	49
		Col %	45%	25%	48%	40%		42%	48%	96%		10%	69%	32%
	35-54	Count	153	97	14	6		12	97	6	147	92	4	91
		Col %	47%	70%	52%	60%		39%	46%	4%	97%	88%	31%	59%
	55+	Count	25	7			15	6	12		4	3		13
		Col %	8%	5%			100%	19%	6%		3%	3%		8%
Total	Count		326	139	27	10	15	31	210	154	151	105	13	153
D.	Mean		36.6	40.0	34.1	38.8	63.5	39.8	35.5	26.0	43.9	42.4	30.9	39.2
	Median		37	41	38	42	62	37	36	26	43	42	29	40

Income Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.31	Less than Y2	Count	18	3	3	1		2	13	14	4	3		7
	million	Col %	7%	3%	13%	11%		7%	7%	11%	3%	3%		5%
	Y2,000,001 -	Count	21	6	3		2	3	15	17	1	2	2	6
	Y3,000,000	Col %	8%	5%	13%		15%	10%	9%	14%	1%	2%	17%	5%
	Y3,000,001 -	Count	30	7	4	3	5	4	15	19	5	7	2	11
	Y4,000,000	Col %	11%	6%	17%	33%	38%	14%	9%	16%	4%	8%	17%	8%
	Y4,000,001 -	Count	35	14	4		1	2	22	18	16	12	3	14
	Y5,000,000	Col %	13%	12%	17%		8%	7%	13%	15%	12%	13%	25%	11%
	Y5,000,00 -	Count	61	34	6	2	1	8	41	19	41	23	3	35
	Y7,000,000	Col %	22%	29%	25%	22%	8%	28%	23%	16%	31%	26%	25%	27%
	Y7,000,001 -	Count	53	29	3	1	1	5	33	12	39	26	1	26
	Y10,000,000	Col %	19%	25%	13%	11%	8%	17%	19%	10%	30%	29%	8%	20%
	Y10,000,001	Count	48	21	1	1	3	4	32	17	25	16	1	31
	or more	Col %	18%	18%	4%	11%	23%	14%	18%	14%	19%	18%	8%	23%
	No Income	Count	7	3		1		1	4	6	1	1		2
		Col %	3%	3%		11%		3%	2%	5%	1%	1%		2%
Total	Count		273	117	24	9	13	29	175	122	132	90	12	132

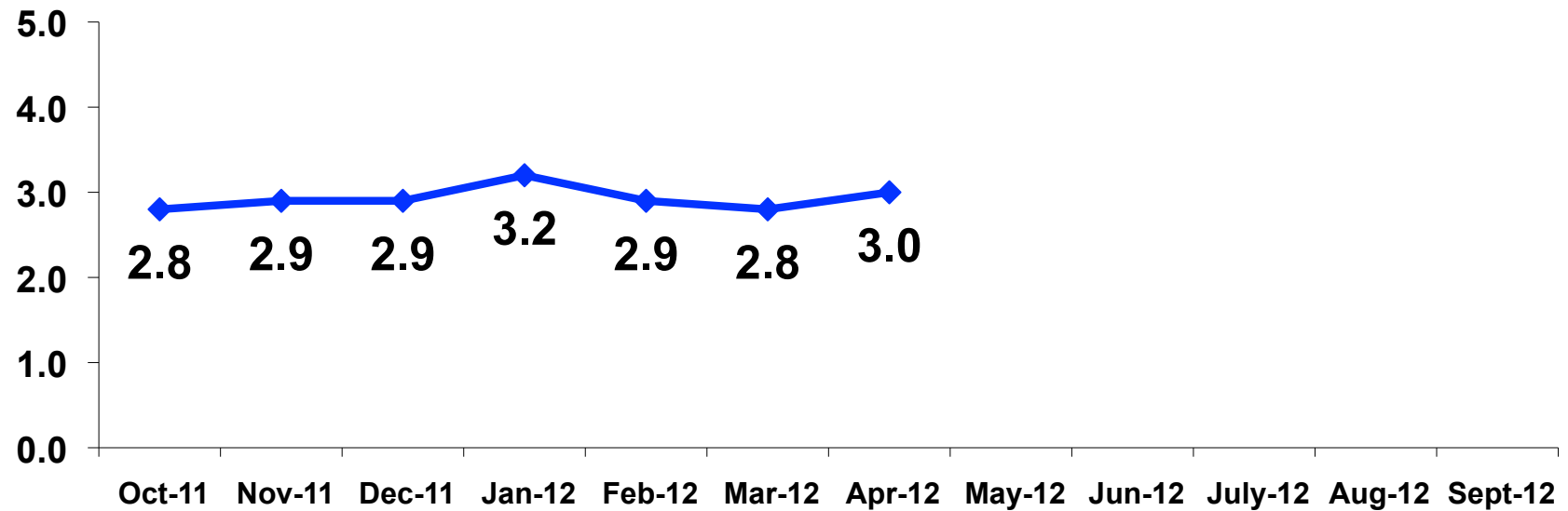
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.3A Yes	Count		173	62	12	7	7	24	116	102	59	38	13	
	Col %		53%	45%	44%	70%	47%	77%	55%	66%	39%	36%	100%	
No	Count		153	77	15	3	8	7	94	52	92	67		153
	Col %		47%	55%	56%	30%	53%	23%	45%	34%	61%	64%		100%
Total	Count		326	139	27	10	15	31	210	154	151	105	13	153

Average Length of Stay Tracking



Average Length of Stay Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q8 Mean	3.0	3.1	2.7	2.5	3.6	3.0	3.0	2.8	3.1	3.2	3.4	3.2
Median	3	3	3	3	3	3	3	3	3	3	3	3
Minimum	1	2	2	2	2	2	1	1	2	2	3	1
Maximum	8	7	4	3	8	4	8	7	7	6	4	8

SECTION 2 **TRAVEL PLANNING**

Travel Planning Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.7	Full package tours	Count	82	40	9		4	12	53	32	44	27	6	35
		Col %	25%	29%	33%		27%	39%	25%	21%	29%	26%	46%	23%
	Free-time package tours	Count	211	83	14		10	16	134	109	88	64	7	99
		Col %	65%	60%	52%		67%	52%	64%	72%	58%	61%	54%	65%
	Individually arranged travel	Count	20	15	1		1	1	15	7	12	14		15
		Col %	6%	11%	4%		7%	3%	7%	5%	8%	13%		10%
	Group tour	Count	10	1	3	10		2	6	4	6			3
		Col %	3%	1%	11%	100%		6%	3%	3%	4%			2%
	Company paid travel	Count	1						1		1			1
		Col %	0%						0%		1%			1%
Total	Count		324	139	27	10	15	31	209	152	151	105	13	153

Travel Motivation Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.5 Beautiful seas, beaches, tropical climate	64%	65%	56%	50%	33%	29%	67%	66%	66%	69%	54%	56%
Short travel time	49%	57%	37%		53%	23%	50%	40%	57%	61%	38%	53%
Pleasure	49%	50%	41%	10%	20%	23%	52%	55%	45%	54%	15%	48%
A previous visit	32%	42%	41%	20%	40%	23%	31%	22%	41%	48%		58%
Price of the tour package	36%	34%	26%	10%	33%	3%	33%	34%	39%	38%	8%	38%
Just to relax	35%	30%	37%	10%	40%	16%	33%	32%	37%	37%	23%	41%
Shopping	33%	31%	30%	10%	13%	19%	33%	36%	31%	31%	8%	32%
Water sports	25%	24%	19%	10%	7%	6%	39%	29%	23%	31%	15%	20%
It is a safe place to spend a vacation	23%	30%	26%	20%	7%	16%	23%	18%	29%	32%	23%	32%
Recommendation of friend, relative, travel agency	15%	12%	30%	20%		6%	17%	21%	11%	12%		7%
To get married or Attend wedding	10%	13%	7%	20%	27%	100%	9%	9%	7%	2%	31%	5%
Other	6%	7%	4%		13%		4%	5%	6%	6%	8%	6%
SCUBA diving	5%	4%			7%	3%	7%	5%	5%	4%	15%	7%
Honeymoon	4%	1%				13%	5%	6%	2%		100%	
Company or Business trip	2%	1%	7%	30%			1%	1%	3%	1%		2%
To golf	1%	1%					2%		3%	1%		3%
Promotional materials from GVB	1%	1%	4%				1%		2%	3%		1%
Organized Sporting Activity	1%	1%					1%		2%	2%		1%
My company sponsored me	1%	1%		10%			1%	1%	1%			
To visit friends or relatives	1%	1%					0%	1%	1%			1%
Special promotion	0%	1%					0%	1%				1%
Total Cases	325	138	27	10	15	31	209	154	150	104	13	152

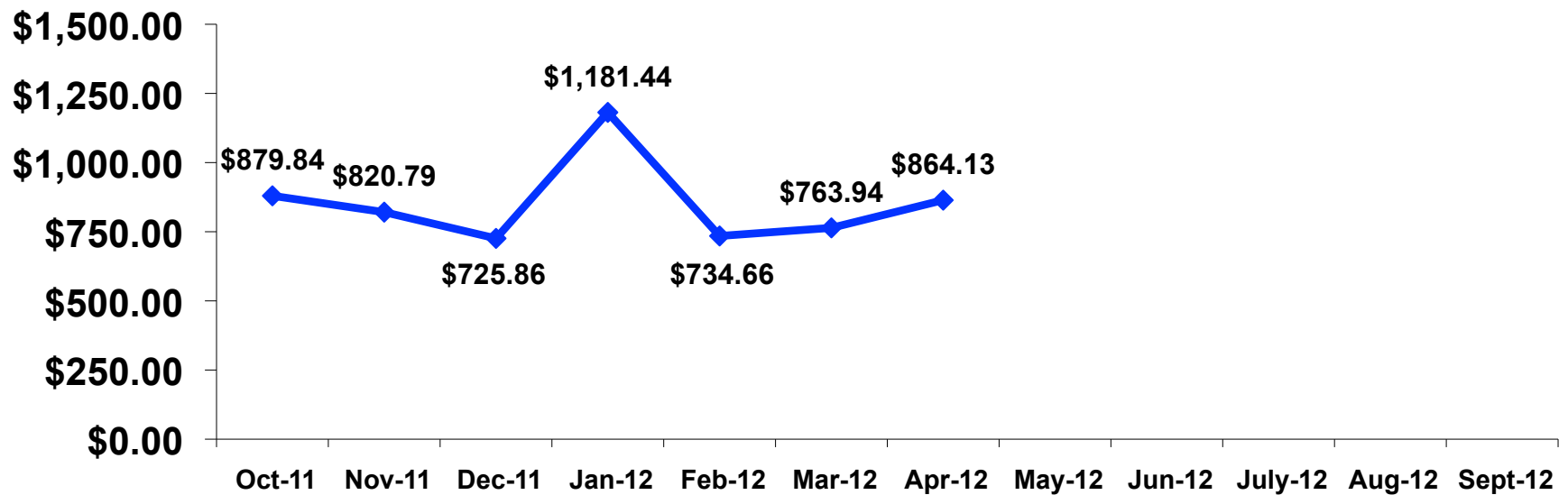
Information Sources Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.1 Internet	65%	63%	69%	33%	40%	65%	66%	70%	63%	69%	54%	70%
Travel guide book at bookstores	61%	57%	65%	56%	40%	74%	62%	60%	64%	61%	77%	56%
I have been to Guam before	41%	51%	46%	22%	47%	23%	38%	27%	54%	56%		35%
Travel agent brochure	42%	43%	50%	56%	53%	58%	41%	38%	45%	42%	69%	33%
Magazine	23%	25%	31%	33%	7%	23%	25%	27%	21%	22%	23%	21%
Friend or relative	18%	12%	27%	33%	13%	16%	20%	25%	12%	10%	23%	9%
TV	7%	7%	8%	22%	7%	3%	8%	9%	5%	6%		5%
Newspaper	3%	3%			13%	3%	2%	1%	3%	2%		2%
Company travel department	2%	1%	8%			6%	1%	4%		1%		1%
GVB promotional activities	1%	2%	4%				1%		3%	4%		3%
Other	1%	1%					0%	1%	1%	1%	8%	
Total Cases	318	134	26	9	15	31	206	150	147	103	13	151

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

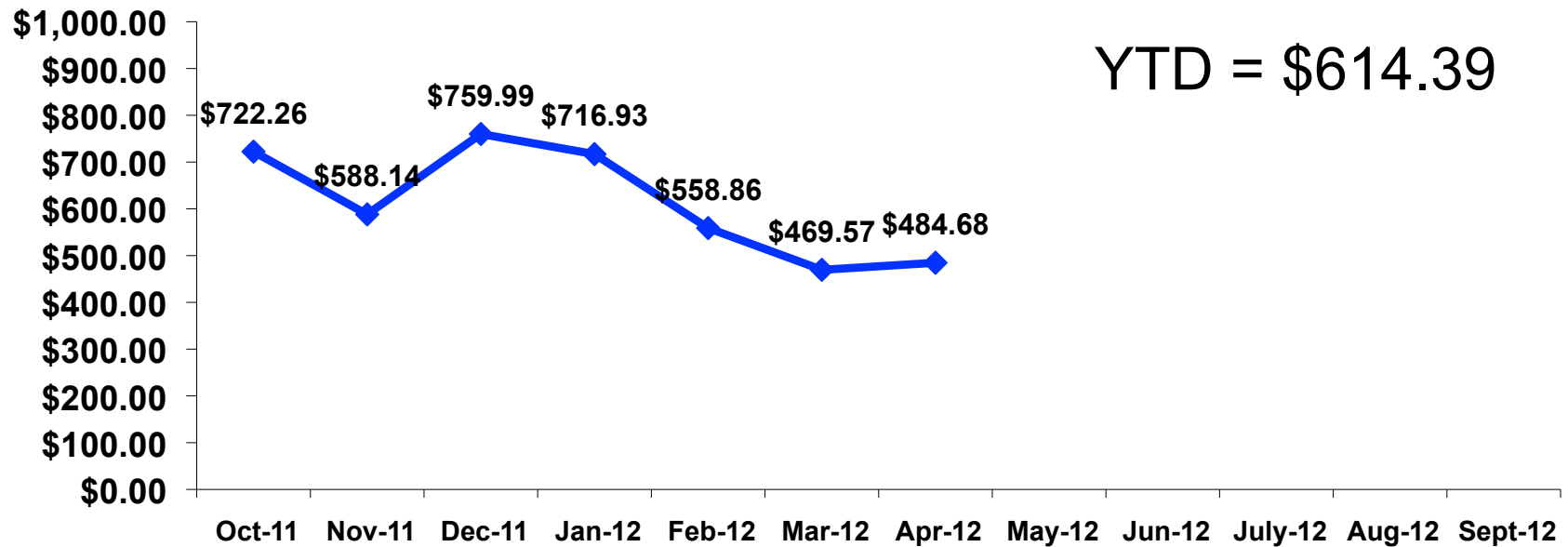
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Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Prepaid	Mean	\$864.13	\$894.27	\$793.04	\$757.91	\$1,071.73	\$1,233.57	\$865.70	\$770.14	\$944.20	\$855.07	\$1,763.65	\$834.78
per	Median	\$818	\$858	\$834	\$846	\$858	\$889	\$818	\$675	\$920	\$858	\$1,594	\$818
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$245.28	\$0.00
converted to \$	Maximum	\$4,292.37	\$3,474.78	\$1,635.19	\$1,839.59	\$3,474.78	\$4,292.37	\$3,679.18	\$4,292.37	\$2,759.38	\$1,716.95	\$4,292.37	\$2,759.38

On-Island Expenditures Tracking



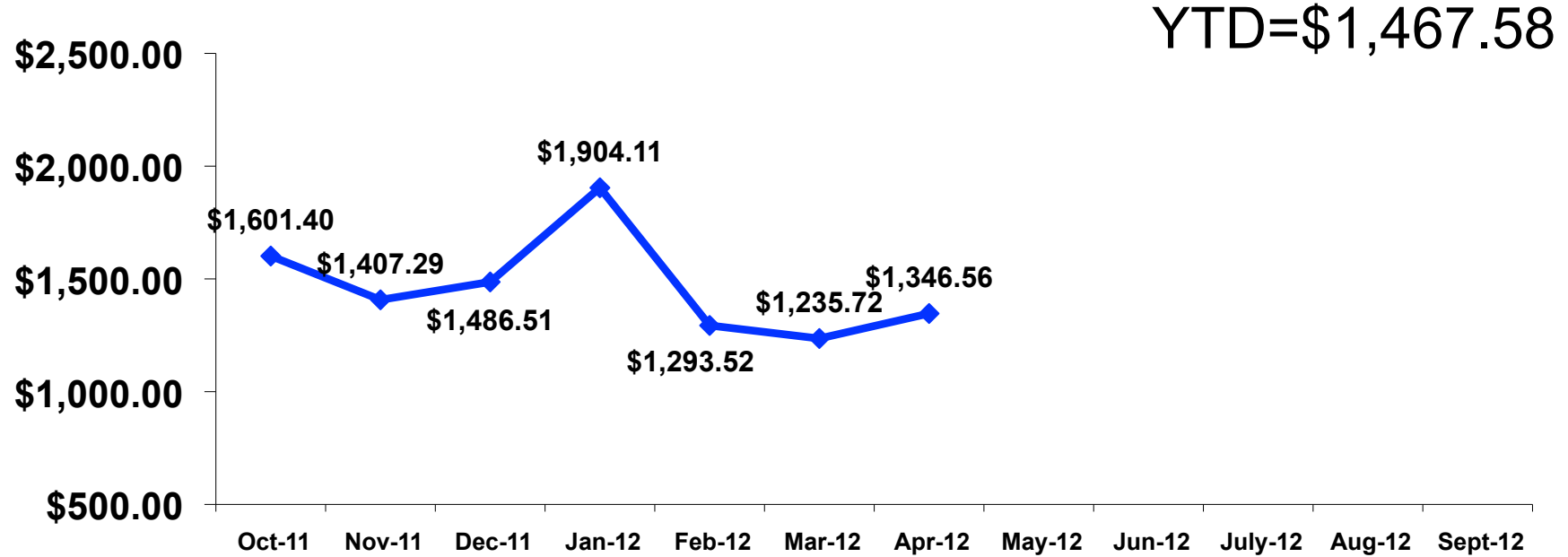
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Per person on-island exp	Mean	\$484.68	\$340.15	\$784.09	\$414.00	\$567.67	\$520.89	\$499.90	\$498.95	\$461.80	\$352.48	\$591.73	\$465.60
	Median	\$345	\$300	\$325	\$300	\$285	\$358	\$350	\$400	\$300	\$260	\$550	\$300
	Minimum	\$0.00	\$0.00	\$133.33	\$180.00	\$0.00	\$80.00	\$0.00	\$0.00	\$0.00	\$0.00	\$200.00	\$0.00
	Maximum	\$5,000.00	\$2,300.00	\$5,000.00	\$1,000.00	\$2,500.00	\$2,300.00	\$5,000.00	\$5,000.00	\$2,800.00	\$2,220.00	\$1,000.00	\$5,000.00

On-Island Expense Breakdown

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
F&B-HOTEL	Mean	\$63.08	\$99.66	\$36.81	\$12.90	\$379.33	\$44.81	\$56.47	\$15.84	\$80.70	\$65.90	\$67.92	\$81.43
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$18.00	\$0.00
F&B-FF	Mean	\$42.39	\$43.48	\$37.78	\$18.00	\$38.67	\$49.68	\$45.60	\$27.62	\$58.31	\$53.54	\$35.00	\$37.50
REST/CONV	Median	\$10.00	\$10.00	\$20.00	\$0.00	\$0.00	\$10.00	\$10.00	\$7.00	\$20.00	\$30.00	\$0.00	\$15.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$101.13	\$125.35	\$74.78	\$75.00	\$140.71	\$121.29	\$102.63	\$64.30	\$133.15	\$142.45	\$58.00	\$117.78
	Median	\$20.00	\$0.00	\$0.00	\$75.00	\$100.00	\$50.00	\$0.00	\$0.00	\$80.00	\$90.00	\$0.00	\$55.00
OPTIONAL TOUR	Mean	\$128.25	\$142.24	\$100.85	\$72.00	\$59.00	\$91.61	\$156.86	\$94.99	\$168.51	\$153.75	\$165.38	\$118.15
	Median	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	\$30.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$190.02	\$183.60	\$151.11	\$94.00	\$214.67	\$191.29	\$200.14	\$163.22	\$220.73	\$214.19	\$220.77	\$204.41
	Median	\$35.00	\$50.00	\$0.00	\$35.00	\$50.00	\$70.00	\$20.00	\$20.00	\$70.00	\$60.00	\$0.00	\$50.00
GIFT/SOUV- F&F AT HOME	Mean	\$151.64	\$135.93	\$138.19	\$115.00	\$381.33	\$267.10	\$149.21	\$105.96	\$164.61	\$149.65	\$178.46	\$177.48
	Median	\$50.00	\$100.00	\$30.00	\$75.00	\$100.00	\$100.00	\$57.00	\$40.00	\$100.00	\$100.00	\$120.00	\$100.00
LOCAL TRANS	Mean	\$22.54	\$18.85	\$33.67	\$12.50	\$10.33	\$4.35	\$25.59	\$19.69	\$27.28	\$27.92	\$31.38	\$30.39
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$262.16	\$317.57	\$459.15	\$164.60	\$122.33	\$227.13	\$260.01	\$227.77	\$318.85	\$273.30	\$426.54	\$262.75
	Median	\$8.00	\$0.00	\$85.00	\$50.00	\$10.00	\$30.00	\$2.50	\$15.00	\$6.00	\$0.00	\$250.00	\$0.00

Total Expenditures Tracking



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Total	Mean	\$1,346.56	\$1,234.42	\$1,546.31	\$1,171.91	\$1,639.40	\$1,742.43	\$1,362.12	\$1,263.71	\$1,406.00	\$1,207.55	\$2,355.38	\$1,301.38
per	Median	\$1,179.79	\$1,155.11	\$1,189.13	\$1,159.79	\$1,306.39	\$1,319.70	\$1,170.74	\$1,103.75	\$1,235.84	\$1,147.78	\$1,916.95	\$1,162.15
person	Minimum	\$0.00	\$0.00	\$500.00	\$200.00	\$0.00	\$200.00	\$0.00	\$0.00	\$0.00	\$70.00	\$849.99	\$0.00
expense	Maximum	\$5,981.11	\$3,649.03	\$5,981.11	\$2,089.59	\$3,641.44	\$5,102.37	\$5,981.11	\$5,981.11	\$4,339.59	\$3,139.79	\$5,102.37	\$5,981.11

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 2011, Jan, Feb, Mar, Apr 2011 and Overall Oct 2011 - Apr 2012								
	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	Combined Oct 2011 - Apr 2012
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	2	2	1	1	3	2	3
Ease of getting around	6		6					4
Safety walking around at night								
Quality of daytime tours			5		4		3	6
Variety of daytime tours	2							
Quality of nighttime tours								
Variety of nighttime tours								7
Quality of shopping	4	1	7		2	2	4	2
Variety of shopping			1	2				
Price of things on Guam	1	4	4					5
Quality of hotel accommodations	5	3	3	3	3	1	1	1
% of Overall Satisfaction Accounted For	49.9%	46.6%	50.2%	43.1%	43.9%	39.4%	46.2%	45.3%

NOTE: Only significant variables are ranked.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by four significant factors in the April 2012 Period. By rank order they are:
 - **Quality of hotel accommodations,**
 - **Cleanliness of beaches and parks,**
 - **Quality of daytime tours, and**
 - **Quality of shopping.**
- With all four factors the overall r^2 is .462 meaning that **46.2% of overall satisfaction is accounted for by these four factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2011, and Jan, Feb, Mar, Apr 2012 and Overall Oct 2011 - Apr 2012								
	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	Combined Oct 2011 - Apr 2012
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks						1		
Ease of getting around								
Safety walking around at night								
Quality of daytime tours								
Variety of daytime tours				3				
Quality of nighttime tours								
Variety of nighttime tours		2						3
Quality of shopping	1	1	1	2				1
Variety of shopping								
Price of things on Guam								
Quality of hotel accommodations	2			1				2
% of Overall Satisfaction Accounted For	9.2%	8.1%	2.2%	4.8%	0.0%	2.5%	0.0%	2.5%

NOTE: Only significant variables are ranked.

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 April 2012 Period.