



**GUAM VISITORS BUREAU
Japan Visitor Tracker Exit Profile
FY2011 MARKET SEGMENTATION
AUGUST 2011**



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 **327** 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 **327** 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:
 - Divers
 - Families
 - Golfers
 - Group Travelers
 - OL's/ salary women
 - Seniors
 - Shoppers
 - Repeat Visitors
 - Students
 - Visitors coming to Guam for a wedding
 - Honeymooners
 - 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

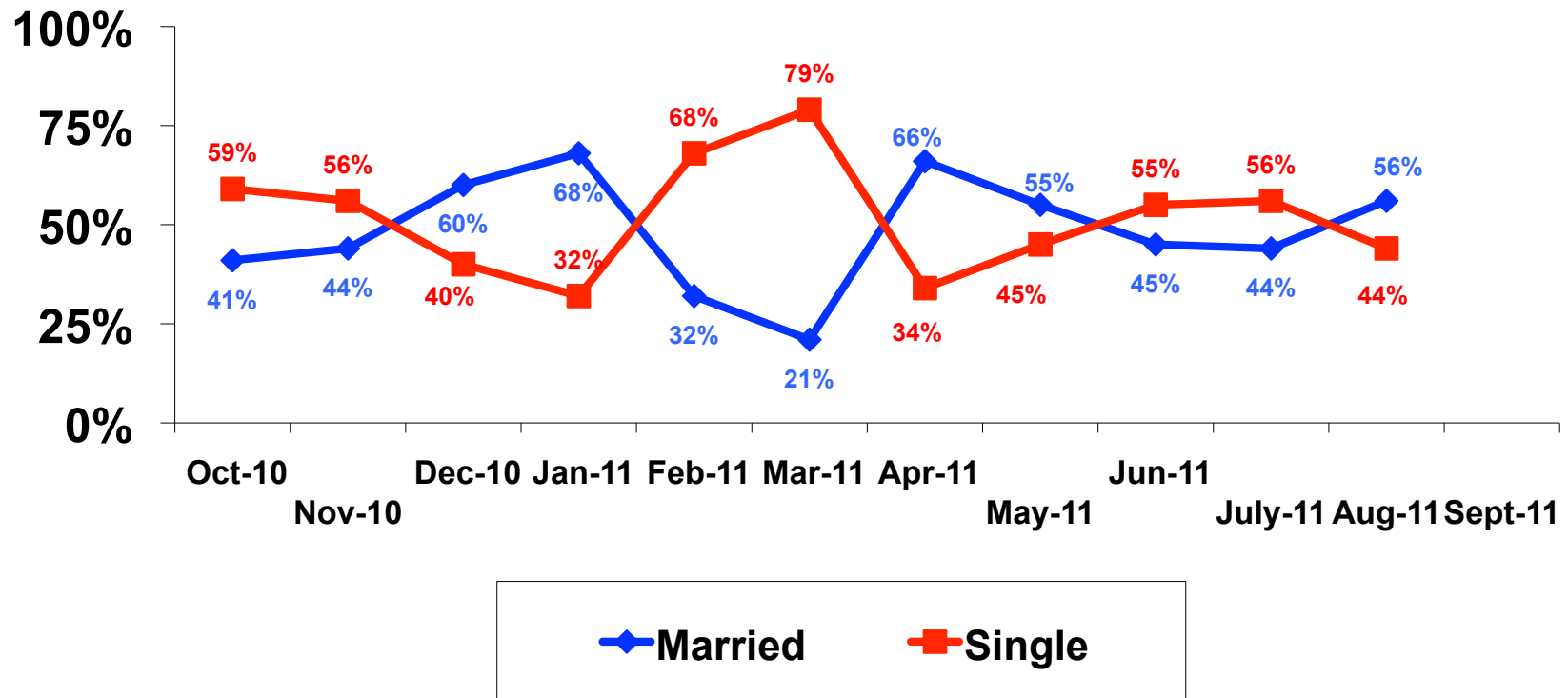
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

Highlighted Segments

	Oct 10	Nov 10	Dec 10	Jan 11	Feb 11	Mar 11	Apr 11	May 11	Jun 11	July 11	Aug 11	Sept 11
Families	23%	19%	23%	46%	16%	13%	46%	29%	20%	23%	44%	
Repeaters	38%	39%	42%	56%	29%	22%	47%	45%	41%	42%	41%	
Shoppers	58%	62%	57%	58%	64%	61%	64%	70%	79%	76%	84%	
Seniors	9%	8%	16%	10%	8%	8%	12%	11%	7%	6%	8%	
OL/Salary-woman	18%	14%	16%	10%	10%	3%	7%	17%	15%	15%	11%	
Group Travelers	6%	3%	6%	2%	5%	6%	2%	2%	4%	2%	1%	
Students	13%	13%	6%	8%	33%	65%	18%	2%	5%	7%	3%	
Golfers	4%	4%	4%	8%	6%	7%	4%	5%	4%	2%	3%	
Wedding	6%	5%	11%	2%	4%	3%	6%	5%	8%	4%	0%	
Divers	9%	10%	8%	9%	10%	12%	11%	10%	11%	12%	14%	
Honey-mooner	5%	5%	8%	3%	3%	1%	4%	6%	10%	5%	3%	
TOTAL	329	329	329	328	328	328	325	327	327	327	327	

SECTION 1
PROFILE OF RESPONDENTS

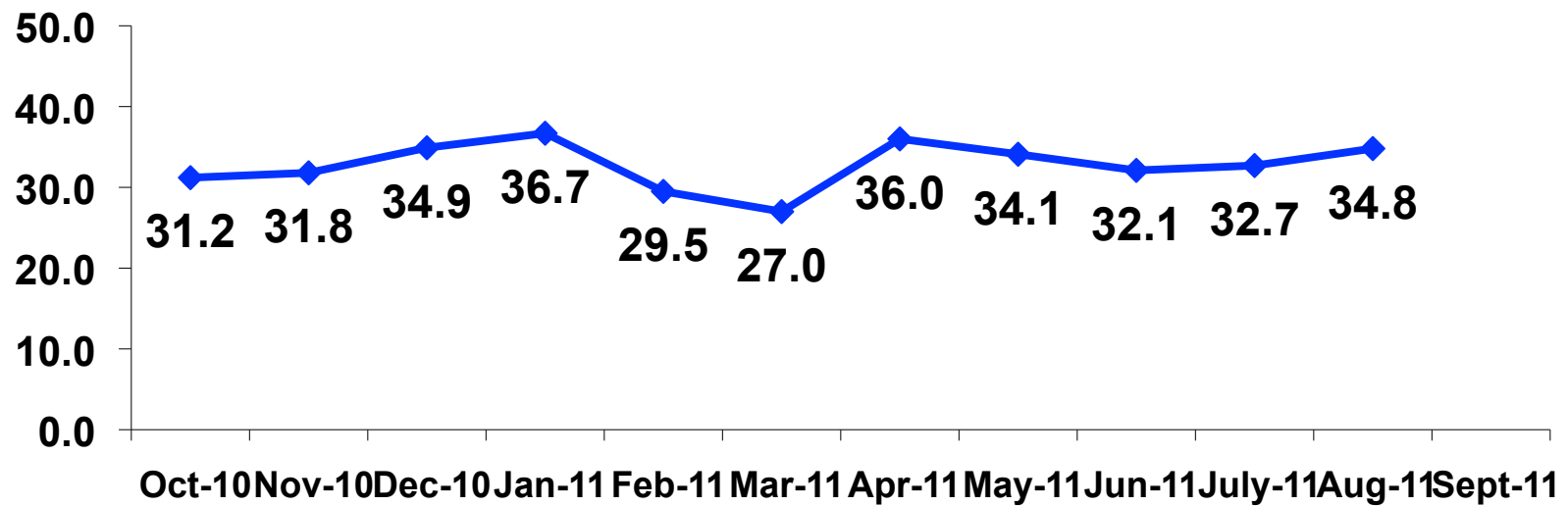
Marital Status Tracking



Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
C. Married	Count		183	121	96	153	2	1	1	5	1	10	19	23
	Col %		56%	84%	72%	56%	6%	33%	9%	50%	100%	100%	41%	92%
Single	Count		144	23	37	121	33	2	10	5			27	2
	Col %		44%	16%	28%	44%	94%	67%	91%	50%			59%	8%
Total	Count		327	144	133	274	35	3	11	10	1	10	46	25

Average Age Tracking



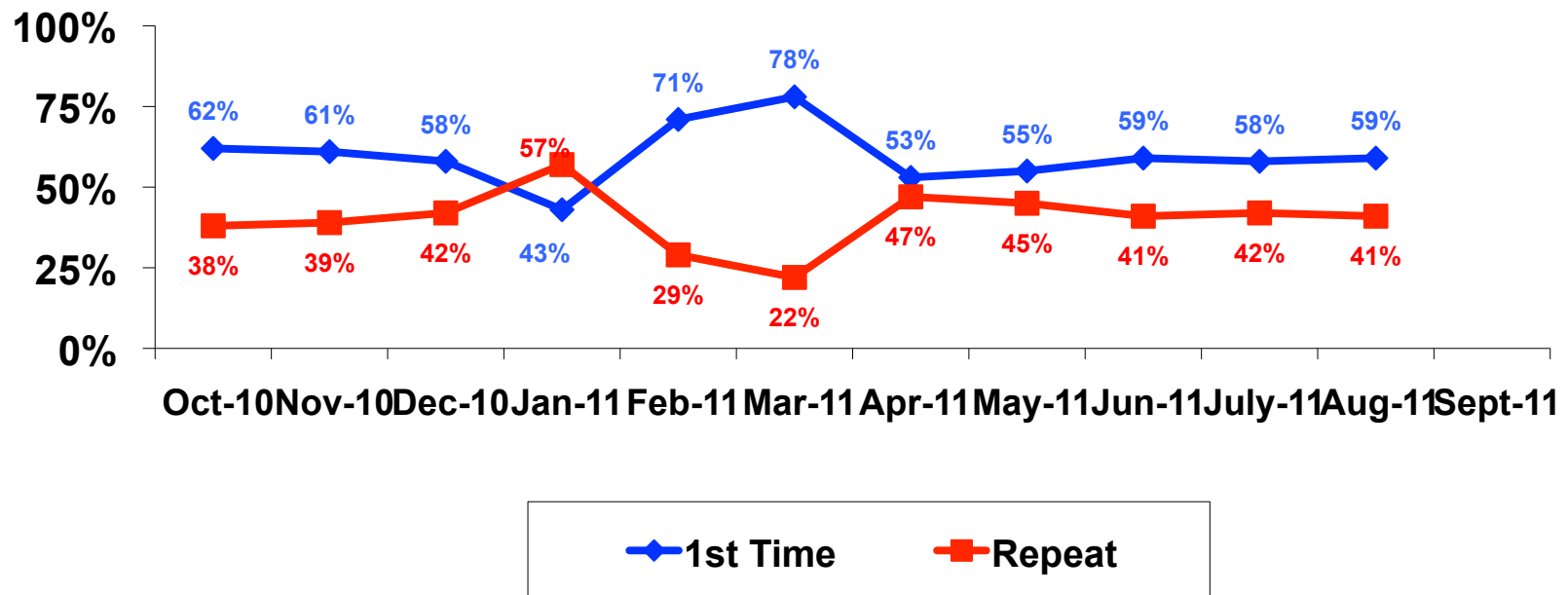
Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	163	27	42	141	32	2	11	4	1	8	31	
		Col %	50%	19%	32%	51%	91%	67%	100%	40%	100%	80%	67%	
	35-54	Count	155	110	83	128	3	1		6		2	12	16
		Col %	47%	76%	62%	47%	9%	33%		60%		20%	26%	64%
	55+	Count	9	7	8	5							3	9
		Col %	3%	5%	6%	2%							7%	36%
Total	Count		327	144	133	274	35	3	11	10	1	10	46	25
D.	Mean		34.8	40.9	38.5	34.5	26.6	27.3	21.2	39.2	34.0	32.4	32.2	54.6
	Median		35	42	40	34	25	24	20	45	34	33	28	52

Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than Y2 million	Count	12	1	3	11	2		1				4	1
		Col %	4%	1%	3%	5%	7%		11%				11%	5%
	Y2,000,001 - Y3,000,000	Count	26		3	20	4		1				5	
		Col %	9%		3%	8%	15%		11%				14%	
	Y3,000,001 - Y4,000,000	Count	23	4	5	20	4					1	4	
		Col %	8%	3%	4%	8%	15%					13%	11%	
	Y4,000,001 - Y5,000,000	Count	30	12	13	24	1	1	1	1		1	1	
		Col %	10%	10%	12%	10%	4%	33%	11%	13%		13%	3%	
	Y5,000,00 - Y7,000,000	Count	73	29	28	63	5		4	3		4	7	3
		Col %	25%	23%	25%	26%	19%		44%	38%		50%	19%	14%
	Y7,000,001 - Y10,000,000	Count	66	43	29	56	2	1	1	3	1	2	11	5
		Col %	23%	34%	26%	23%	7%	33%	11%	38%	100%	25%	31%	24%
	Y10,000,001 or more	Count	55	36	30	45	9	1		1			4	11
		Col %	19%	29%	27%	19%	33%	33%		13%			11%	52%
	No Income	Count	2	1	2	2			1					1
		Col %	1%	1%	2%	1%			11%					5%
Total	Count		287	126	113	241	27	3	9	8	1	8	36	21

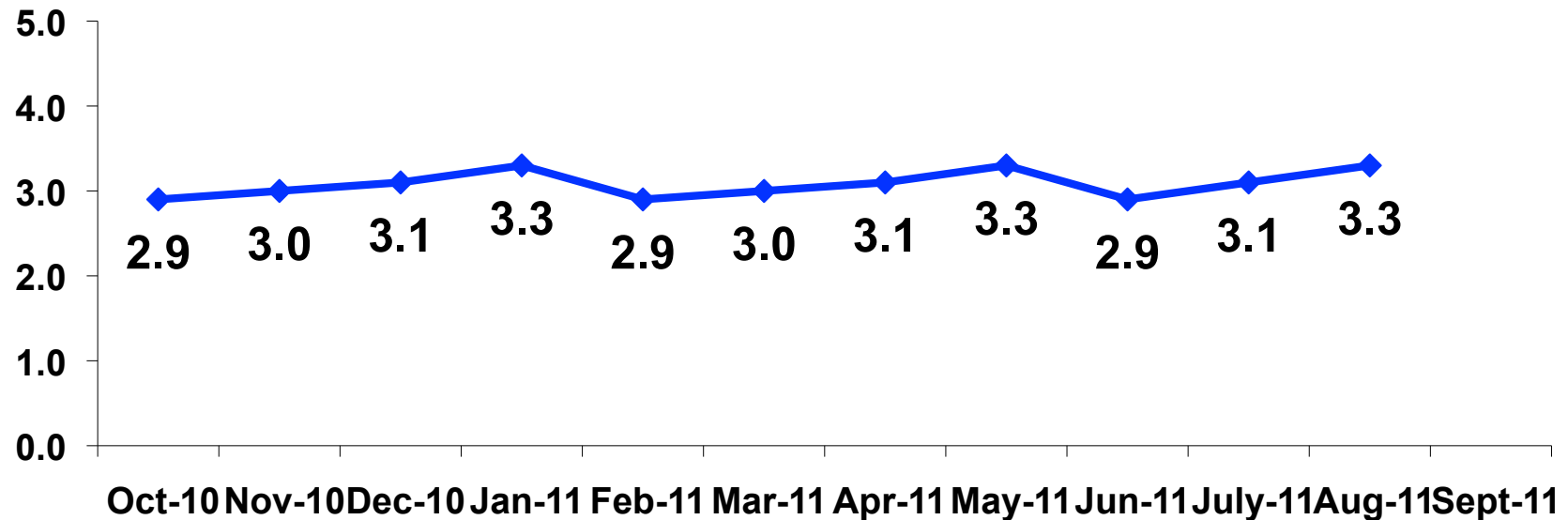
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		194	60		162	26	1	7	4	1	10	31	8
	Col %		59%	42%		59%	74%	33%	64%	40%	100%	100%	67%	32%
No	Count		133	84	133	112	9	2	4	6			15	17
	Col %		41%	58%	100%	41%	26%	67%	36%	60%			33%	68%
Total	Count		327	144	133	274	35	3	11	10	1	10	46	25

Average Length of Stay Tracking



Average Length of Stay Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 8 Mean	3.3	3.7	3.5	3.3	2.9	4.0	2.8	3.1	5.0	3.8	3.4	3.9
Median	3	3	3	3	3	4	3	3	5	4	3	4
Minimum	1	2	1	1	1	3	2	2	5	3	2	2
Maximum	9	9	9	9	5	5	3	4	5	6	7	9

SECTION 2 **TRAVEL PLANNING**

Travel Planning Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.7	Full package tours	Count	73	38	26	64	9		1	3		2	10	5
		Col %	22%	26%	20%	23%	26%		9%	30%		20%	22%	20%
	Free-time package tours	Count	225	89	90	187	24		10	6	1	8	32	16
		Col %	69%	62%	68%	68%	69%		91%	60%	100%	80%	70%	54%
	Individually arranged travel	Count	26	15	15	21	2						4	4
		Col %	8%	10%	11%	8%	6%						9%	16%
	Group tour	Count	3	2	2	2		3		1				
		Col %	1%	1%	2%	1%		100%		10%				
Total	Count		327	144	133	274	35	3	11	10	1	10	46	25

Travel Motivation Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Beautiful seas, beaches, tropical climate	65%	64%	67%	65%	74%	33%	64%	40%		50%	67%	60%
Short travel time	53%	66%	54%	52%	49%	33%	45%	60%		30%	43%	48%
Pleasure	54%	53%	50%	55%	57%	33%	73%	40%		20%	54%	48%
Just to relax	40%	41%	46%	41%	54%		45%	30%		10%	41%	44%
Shopping	39%	33%	41%	43%	74%		27%	40%		30%	33%	36%
A previous visit	31%	48%	75%	30%	14%	67%	27%	30%			20%	60%
Water sports	28%	28%	29%	28%	34%	67%	27%	30%		20%	48%	28%
Price of the tour package	29%	26%	26%	29%	31%		45%	30%		50%	22%	20%
It is a safe place to spend a vacation	22%	28%	28%	22%	20%	33%	27%	30%			11%	16%
Recommendation of friend, relative, travel agency	13%	8%	8%	13%	29%		9%	40%			15%	16%
SCUBA diving	6%	3%	5%	5%	3%			10%			33%	4%
Other	4%	4%	3%	4%							2%	12%
Honeymoon	3%	1%		4%	3%				100%	100%		
To visit friends or relatives	2%	2%	2%	3%							4%	
Organized Sporting Activity	2%	2%	3%	2%							4%	8%
To golf	1%	1%	1%	1%	3%			30%				
My company sponsored me	1%	1%		1%								
To get married or Attend wedding	0%	1%		0%					100%	10%		
Special promotion	0%			0%								
Total Cases	327	144	133	274	35	3	11	10	1	10	46	25

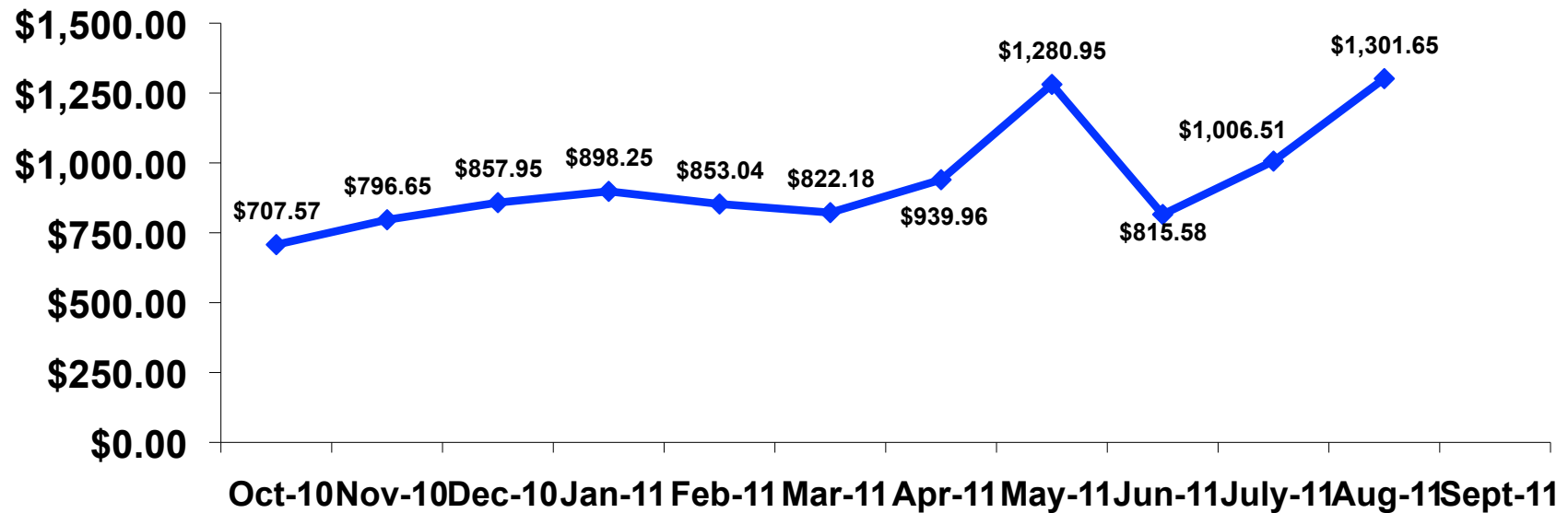
Information Sources Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR	
Q.1													
Travel guide book at bookstores	66%	70%	61%	67%	74%	67%	55%	60%	100%	70%	67%	64%	
Internet	64%	64%	62%	64%	63%	100%	55%	50%		50%	71%	60%	
I have been to Guam before	40%	58%	98%	40%	26%	67%	36%	60%			31%	64%	
Travel agent brochure	46%	48%	37%	48%	51%	33%	73%	30%	100%	50%	31%	44%	
Magazine	22%	18%	17%	22%	20%	33%	18%	10%		20%	24%	20%	
Friend or relative	20%	9%	9%	22%	34%	33%	27%	20%	100%	50%	24%	4%	
Company travel department	5%	2%	2%	6%	14%	33%		10%			2%		
TV	2%	1%	4%	3%		33%	18%	20%			4%		
Newspaper	1%	2%	2%	1%		33%		10%				4%	
Other	1%	1%	1%	0%								4%	
GVB promotional activities	0%	1%											
GVB office	0%			0%									
Total	Cases	324	141	133	272	35	3	11	10	1	10	45	25

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

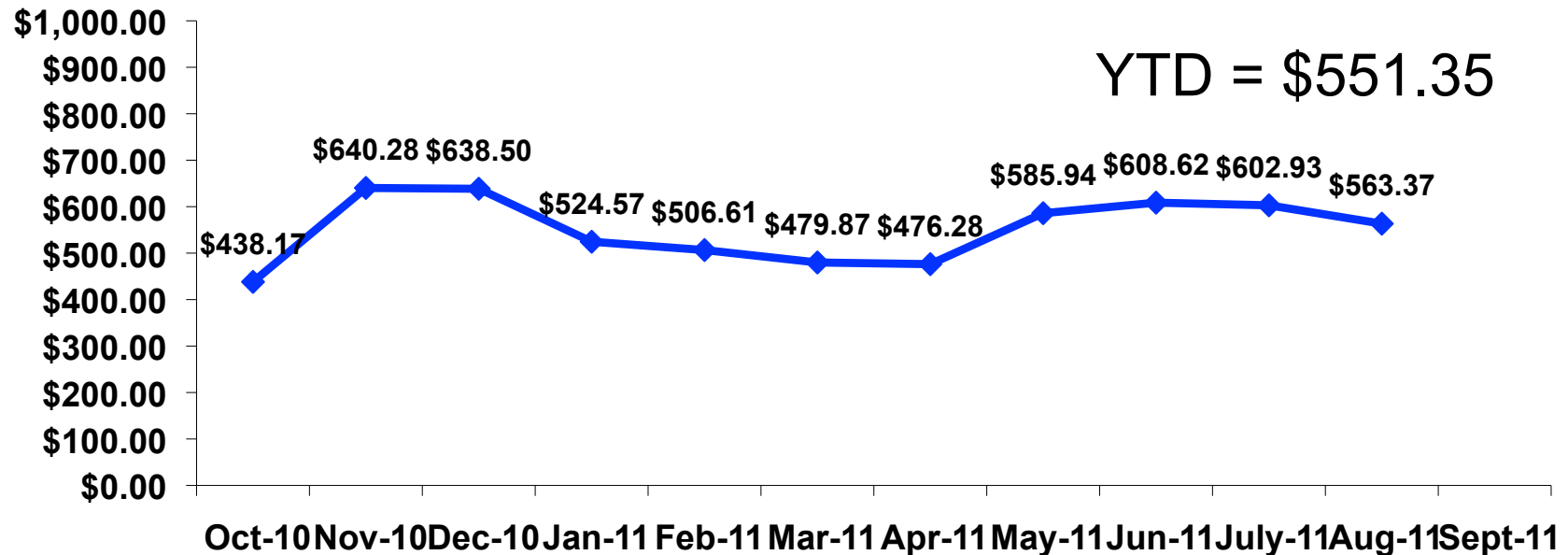
YTD=\$934.32



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid	Mean	\$1,301.65	\$1,282.28	\$1,251.40	\$1,304.72	\$1,406.12	\$1,034.53	\$1,068.62	\$1,173.54	\$1,385.53	\$1,558.44	\$1,280.99	\$1,479.42
per	Median	\$1,293	\$1,293	\$1,280	\$1,293	\$1,311	\$1,164	\$776	\$1,293	\$1,386	\$1,339	\$1,293	\$1,552
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$646.58	\$737.10	\$0.00	\$1,385.53	\$38.79	\$0.00	\$0.00
converted to \$	Maximum	\$3,879.48	\$3,071.25	\$2,909.61	\$3,879.48	\$2,909.61	\$1,293.16	\$2,586.32	\$1,551.79	\$1,385.53	\$3,879.48	\$2,586.32	\$2,585.32

On-Island Expenditures Tracking



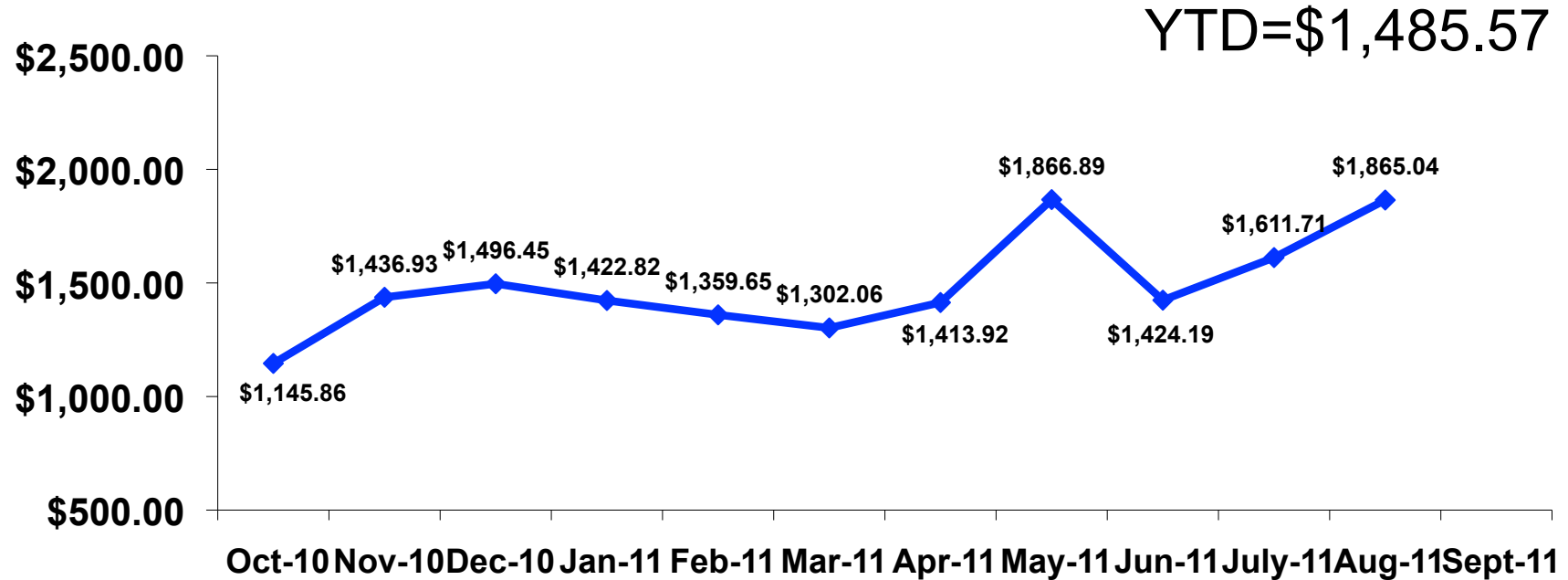
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$563.37	\$407.03	\$563.21	\$589.42	\$747.56	\$425.00	\$457.00	\$348.60	\$107.14	\$568.31	\$688.57	\$433.96
	Median	\$406	\$333	\$425	\$441	\$600	\$375	\$375	\$306	\$107	\$313	\$500	\$400
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$180.00	\$300.00	\$160.00	\$166.67	\$107.14	\$0.00	\$0.00	\$0.00
	Maximum	\$5,000.00	\$2,000.00	\$3,000.00	\$5,000.00	\$2,000.00	\$600.00	\$1,620.00	\$700.00	\$107.14	\$2,500.00	\$5,000.00	\$1,200.00

On-Island Expense Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$44.22	\$70.68	\$54.03	\$39.29	\$17.97	\$62.67	\$6.36	\$22.00	\$250.00	\$45.20	\$26.46	\$74.60
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	\$250.00	\$0.00	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$32.50	\$40.97	\$41.39	\$31.45	\$12.46	\$13.33	\$15.45	\$15.00	\$0.00	\$30.50	\$19.98	\$34.00
	Median	\$3.00	\$0.00	\$10.00	\$3.00	\$0.00	\$20.00	\$20.00	\$0.00	\$0.00	\$2.50	\$3.50	\$0.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$95.76	\$112.69	\$115.35	\$94.05	\$65.03	\$23.33	\$22.73	\$116.50	\$250.00	\$114.90	\$101.74	\$114.00
	Median	\$15.00	\$0.00	\$25.00	\$7.50	\$0.00	\$0.00	\$0.00	\$0.00	\$250.00	\$24.50	\$0.00	\$0.00
OPTIONAL TOUR	Mean	\$145.66	\$164.68	\$146.91	\$140.60	\$101.97	\$33.33	\$87.45	\$91.00	\$600.00	\$156.80	\$194.43	\$133.16
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$600.00	\$0.00	\$104.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$227.85	\$213.06	\$275.92	\$244.96	\$288.43	\$66.67	\$192.82	\$59.00	\$0.00	\$468.30	\$163.76	\$120.84
	Median	\$50.00	\$5.00	\$50.00	\$50.00	\$50.00	\$100.00	\$41.00	\$0.00	\$0.00	\$41.50	\$20.00	\$0.00
GIFT/SOUV- F&F AT HOME	Mean	\$123.07	\$143.37	\$132.93	\$130.15	\$90.71	\$83.33	\$37.27	\$110.00	\$400.00	\$267.60	\$101.74	\$127.80
	Median	\$50.00	\$50.00	\$100.00	\$55.00	\$40.00	\$50.00	\$10.00	\$100.00	\$400.00	\$5.00	\$50.00	\$0.00
LOCAL TRANS	Mean	\$11.43	\$12.56	\$15.41	\$11.30	\$5.11	\$6.67	\$6.64	\$3.50	\$0.00	\$6.40	\$9.30	\$19.84
	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	\$393.43	\$526.20	\$517.84	\$393.83	\$336.26	\$510.67	\$170.09	\$278.50	\$0.00	\$145.50	\$403.58	\$749.56
	Median	\$35.00	\$100.00	\$60.00	\$25.00	\$160.00	\$600.00	\$73.00	\$320.00	\$0.00	\$10.00	\$84.91	\$70.00

Total Expenditures Tracking



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Total	Mean	\$1,865.04	\$1,689.30	\$1,814.61	\$1,894.15	\$2,153.68	\$1,459.53	\$1,525.62	\$1,522.14	\$1,492.67	\$2,126.76	\$1,969.29	\$1,913.38
per	Median	\$1,756.81	\$1,670.80	\$1,675.35	\$1,790.88	\$2,163.84	\$1,463.84	\$1,240.55	\$1,591.15	\$1,492.67	\$1,641.86	\$1,893.16	\$1,939.74
person	Minimum	\$.00	\$.00	\$.00	\$.00	\$200.00	\$1,246.58	\$1,017.90	\$300.00	\$1,492.67	\$364.79	\$600.00	\$432.72
expense	Maximum	\$6,001.42	\$4,155.27	\$4,293.16	\$6,001.42	\$4,155.27	\$1,668.16	\$2,886.32	\$2,251.79	\$1,492.67	\$4,629.48	\$6,001.42	\$3,537.46

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 2010, Jan, Feb, Mar, Apr, May, June, July, Aug 2011, Overall Oct 2010 - Aug 2011												
	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Combined Oct 2010 - Aug 2011
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	2		2	3	1	4	3	3	2	2		3
Ease of getting around										4		6
Safety walking around at night		3	4									
Quality of daytime tours									4			4
Variety of daytime tours					3	2					3	
Quality of nighttime tours										5		
Variety of nighttime tours												
Quality of shopping		2	1			3		1	1	1	1	1
Variety of shopping	3			2	2							5
Price of things on Guam	1		3				1					7
Quality of hotel accommodations		1		1		1	2	2	3	3	2	2
% of Overall Satisfaction Accounted For	36.7%	36.0%	53.0%	41.1%	38.6%	57.6%	45.5%	38.5%	35.8%	40.5%	32.9%	41.1%

NOTE: Only significant variables are ranked.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by three significant factors in the August 2011 Period. By rank order they are:
 - **Quality of shopping,**
 - **Quality of hotel accommodations, and**
 - **Variety of daytime tours.**
- With all three factors the overall r^2 is .329 meaning that **32.9% of overall satisfaction is accounted for by these three factors.**

Comparison of Drivers of Per Person On Island Expenditure, Oct, Nov, Dec 2010, Jan, Feb, Mar, Apr, May, June, July, Aug 2011, Overall Oct 2010 - Aug 2011												
	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Combined Oct 2010 - Aug 2011
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks					1							2
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								2				
Quality of shopping	1								1	1	1	1
Variety of shopping			1					1				
Price of things on Guam					2	1						
Quality of hotel accommodations											2	3
% of Overall Satisfaction Accounted For	4.0%	0.0%	2.2%	0.0%	0.9%	3.2%	0.0%	4.8%	2.5%	3.4%	5.3%	2.2%

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 two significant factors in the August 2011 Period. They are:
 - **Quality of shopping, and**
 - **Quality of hotel accommodations.**
- With these two factors the overall r^2 is .053 meaning that **5.3% of per person on island expenditure is accounted for by these factors.**