



GUAM VISITORS BUREAU
Japan Visitor Tracker Exit Profile
FY2012 MARKET SEGMENTATION –
AUGUST 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 **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:
 - 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

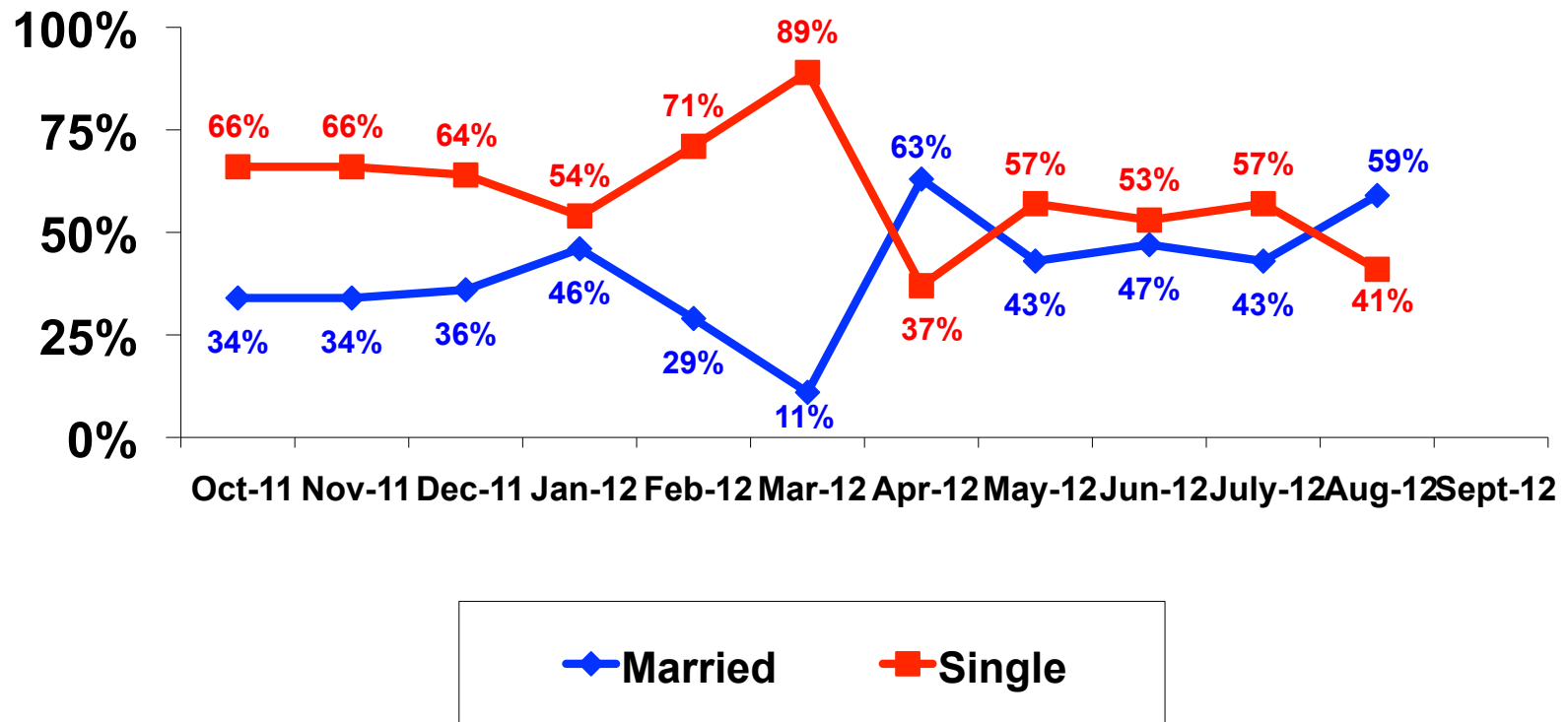
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.18/Q.19/Q.28
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%	26%	20%	20%	46%	
Office Lady	14%	10%	11%	13%	7%	6%	8%	15%	11%	11%	10%	
Group	3%	2%	2%	3%	6%	4%	3%	2%	3%	4%	2%	
Silver	2%	2%	4%	2%	2%	1%	5%	5%	5%	3%	1%	
Wedding	4%	7%	4%	4%	3%	5%	10%	7%	12%	7%	4%	
Sport	67%	69%	58%	68%	68%	73%	64%	61%	60%	66%	69%	
18-35	77%	82%	69%	59%	79%	92%	47%	71%	66%	69%	47%	
36-55	19%	15%	27%	36%	18%	7%	46%	23%	25%	26%	48%	
Child	6%	7%	10%	17%	6%	3%	32%	10%	6%	10%	35%	
Honeymoon	6%	7%	5%	3%	4%	2%	4%	4%	8%	3%	2%	
Repeat	33%	36%	43%	47%	35%	22%	47%	38%	43%	42%	48%	
TOTAL	326	325	327	327	327	328	326	327	327	327	327	

SECTION 1
PROFILE OF RESPONDENTS

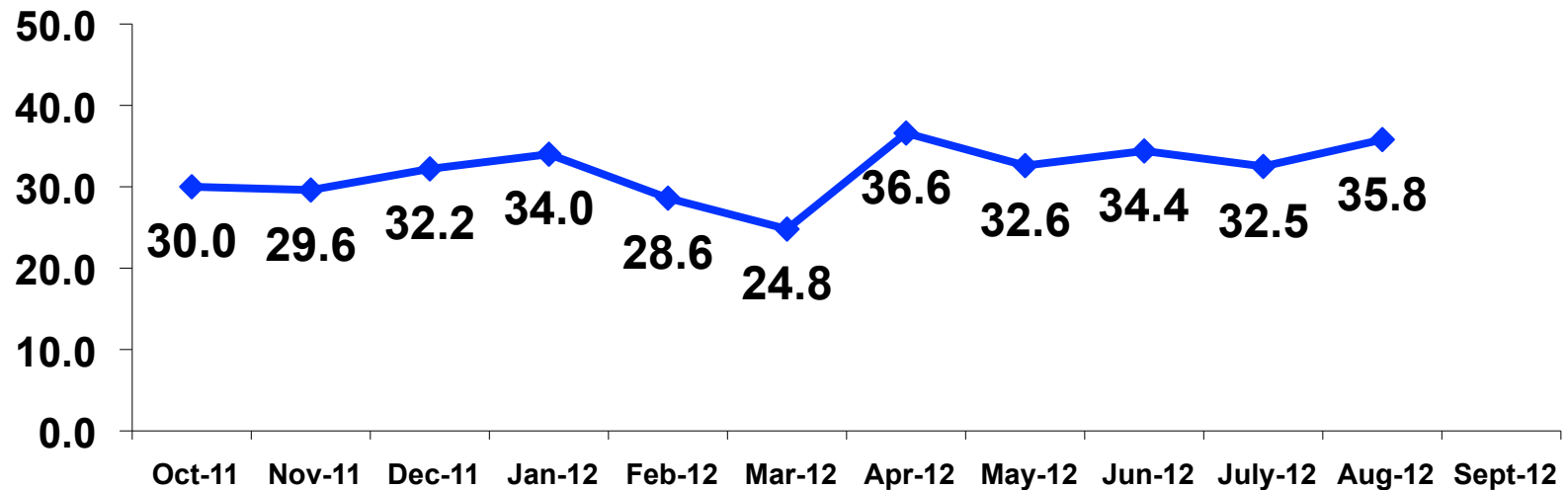
Marital Status Tracking



Marital Status Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
C. Married	Count		194	128	7	6	4	4	134	37	144	110	7	108
	Col %		59%	85%	23%	100%	100%	33%	59%	24%	91%	96%	100%	69%
Single	Count		133	23	24			8	93	118	14	5		49
	Col %		41%	15%	77%			67%	41%	76%	9%	4%		31%
Total	Count		327	151	31	6	4	12	227	155	158	115	7	157

Average Age Tracking



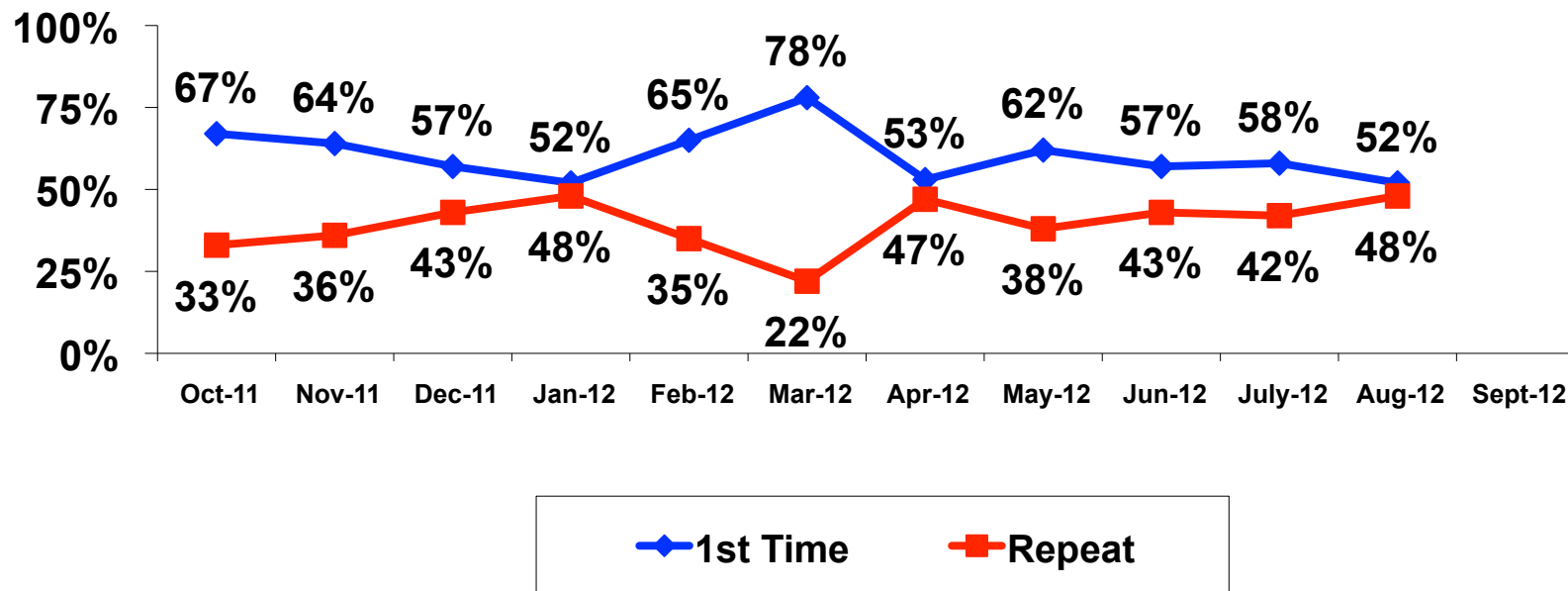
Age Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
D.	18-34	Count	153	30	19			9	115	153		11	7	51
		Col %	47%	20%	61%			75%	51%	99%		10%	100%	33%
	35-54	Count	160	111	11	6		2	102	2	158	100		98
		Col %	49%	74%	35%	100%		17%	45%	1%	100%	87%		64%
	55+	Count	11	8	1		4	1	8			4		5
		Col %	3%	5%	3%		100%	8%	4%			3%		3%
Total	Count		324	149	31	6	4	12	225	155	158	115	7	154
D.	Mean		35.8	40.8	32.8	42.7	65.3	33.8	35.0	26.5	43.2	42.4	25.6	38.1
	Median		37	41	29	42	66	30	34	26	43	42	26	39

Income Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.31	Less than Y2 million	Count	4	1	2				3	3	1			1
		Col %	1%	1%	8%				2%	2%	1%			1%
	Y2,000,001 - Y3,000,000	Count	27	6	3			1	20	25	2	2	1	12
		Col %	9%	4%	13%			10%	10%	20%	1%	2%	17%	8%
	Y3,000,001 - Y4,000,000	Count	20	4	4			1	13	16	3	2	1	10
		Col %	7%	3%	17%			10%	7%	13%	2%	2%	17%	7%
	Y4,000,001 - Y5,000,000	Count	32	10	5		2	3	19	23	7	7		15
		Col %	11%	7%	21%		50%	30%	10%	19%	5%	6%		10%
	Y5,000,00 - Y7,000,000	Count	80	43	2	3		4	51	24	53	36	1	45
		Col %	28%	31%	8%	50%		40%	26%	19%	35%	33%	17%	31%
	Y7,000,001 - Y10,000,000	Count	68	39	3			1	53	23	44	33	2	34
		Col %	24%	28%	13%			10%	27%	19%	29%	30%	33%	24%
	Y10,000,001 or more	Count	55	35	5	3	1		36	10	40	28	1	25
		Col %	19%	25%	21%	50%	25%		18%	8%	27%	26%	17%	17%
	No Income	Count	1	1			1		1			1		1
		Col %	0%	1%			25%		1%			1%		1%
Total	Count	287	139	24	6	4		10	196	124	150	109	6	143

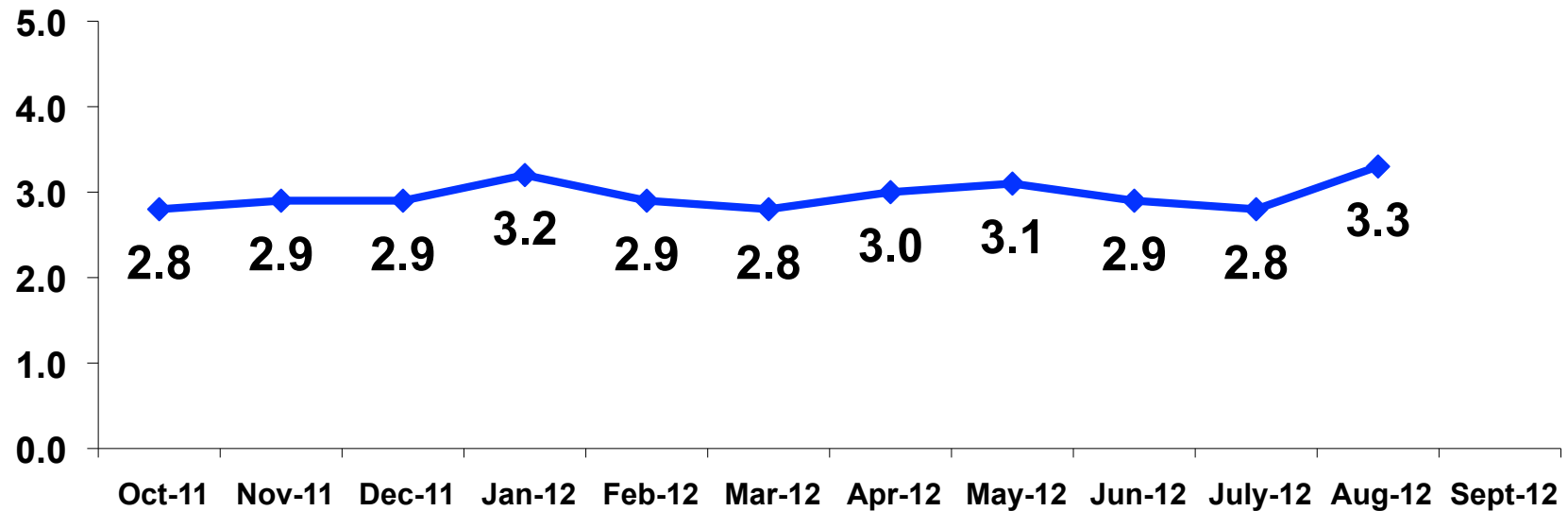
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.3A	Yes	Count	169	65	18	1	3	10	126	101	62	43	7	
		Col %	52%	43%	60%	17%	75%	83%	56%	66%	39%	37%	100%	
	No	Count	157	86	12	5	1	2	100	53	96	72		157
		Col %	48%	57%	40%	83%	25%	17%	44%	34%	61%	63%		100%
Total		Count	326	151	30	6	4	12	226	154	158	115	7	157

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
Q 8 Mean	3.3	3.6	3.1	3.3	3.8	3.2	3.4	3.1	3.6	3.6	3.0	3.4
Median	3	3	3	3	3	3	3	3	3	3	3	3
Minimum	1	1	2	3	3	2	1	1	1	1	2	1
Maximum	9	7	5	4	6	4	9	7	9	6	4	9

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	75	34	10		2	3	52	39	33	26	2	29
	Col %	23%	23%	32%		50%	25%	23%	25%	21%	23%	29%	18%
Free-time package tours	Count	214	91	21		1	7	149	108	99	71	4	107
	Col %	65%	60%	68%		25%	58%	66%	70%	63%	62%	57%	68%
Individually arranged travel	Count	30	19			1	2	21	8	19	13	1	14
	Col %	9%	13%			25%	17%	9%	5%	12%	11%	14%	9%
Group tour	Count	6	6		6			4		6	5		5
	Col %	2%	4%		100%			2%		4%	4%		3%
Other	Count	2	1					1		1			2
	Col %	1%	1%					0%		1%			1%
Total	Count	327	151	31	6	4	12	227	155	158	115	7	157

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	65%	67%	65%	50%	50%	17%	69%	62%	70%	70%	57%	55%
Short travel time	57%	61%	52%	50%	50%	8%	56%	51%	65%	68%	43%	59%
Pleasure	52%	56%	65%	50%	100%	8%	57%	54%	50%	59%	43%	50%
A previous visit	35%	41%	32%	67%	25%	17%	33%	27%	42%	45%		73%
Just to relax	36%	34%	39%	17%	25%	8%	36%	31%	41%	35%	14%	40%
Shopping	34%	32%	45%	33%	25%	25%	33%	35%	34%	33%	43%	38%
Price of the tour package	33%	34%	29%	17%			37%	32%	35%	40%	14%	34%
Water sports	31%	26%	16%	17%		8%	44%	34%	28%	31%	43%	25%
It is a safe place to spend a vacation	26%	36%	6%	33%		8%	26%	18%	34%	36%	43%	31%
Recommendation of friend, relative, travel agency	17%	15%	16%	17%	25%	8%	19%	26%	8%	11%	14%	9%
SCUBA diving	5%	3%				8%	7%	4%	5%	3%		5%
To golf	3%	5%		17%			5%	2%	5%	4%		5%
To get married or Attend wedding	4%	5%				100%	3%	6%	1%		14%	1%
Organized Sporting Activity	3%	5%			25%		4%	1%	4%	5%		3%
Honeymoon	2%	1%				8%	2%	5%			100%	
To visit friends or relatives	2%	1%	3%			8%	1%	2%	2%	3%		2%
Company or Business trip	1%	2%	3%	33%			1%	1%	2%	1%		3%
My company sponsored me	2%	2%	6%				1%	1%	3%	3%		1%
Promotional materials from GVB	1%	2%					1%		2%	3%		2%
Other	1%	2%	3%				1%		2%	3%		1%
Special promotion	1%	2%	3%				1%	1%	1%	2%		1%
Career certification or testing	0%						0%		1%	1%		1%
Total Cases	327	151	31	6	4	12	227	155	158	115	7	157

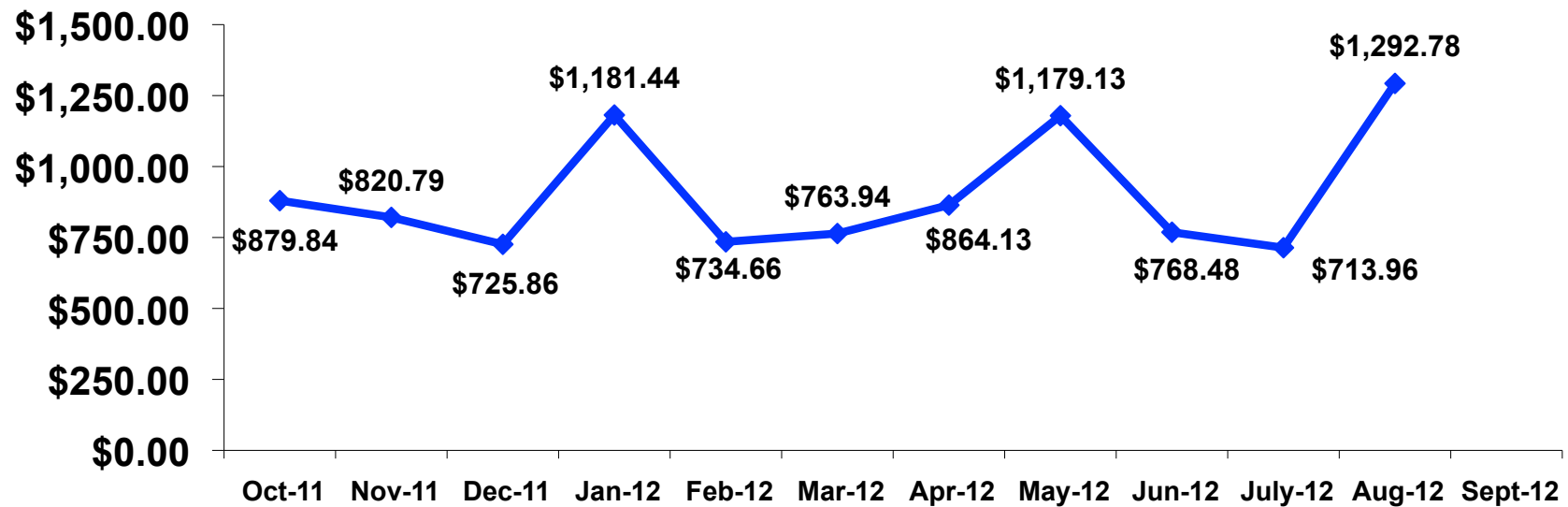
Information Sources Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT	
Q.1 Internet	66%	68%	55%	17%	25%	83%	66%	65%	69%	68%	57%	59%	
Travel guide book at bookstores	63%	61%	58%	50%		42%	65%	64%	65%	60%	86%	52%	
I have been to Guam before	38%	45%	35%	67%	25%	17%	36%	30%	45%	52%		79%	
Travel agent brochure	43%	47%	48%	67%	50%	25%	47%	46%	39%	48%	57%	33%	
Magazine	22%	25%	26%	17%	50%		24%	20%	22%	20%	29%	16%	
Friend or relative	16%	15%	23%	17%		8%	19%	19%	12%	15%	43%	8%	
TV	10%	13%	13%	33%			10%	8%	12%	11%		10%	
Company travel department	3%	1%	3%	17%			2%	4%	3%	3%	14%	1%	
Other	2%	3%	6%				2%	4%	1%	3%		1%	
GVB office	1%	2%				8%	1%	1%	2%	3%	14%	1%	
Newspaper	1%	2%			25%		1%		1%	2%		1%	
GVB promotional activities	0%	1%							1%	1%			
Total	Cases	326	150	31	6	4	12	226	155	157	114	7	156

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

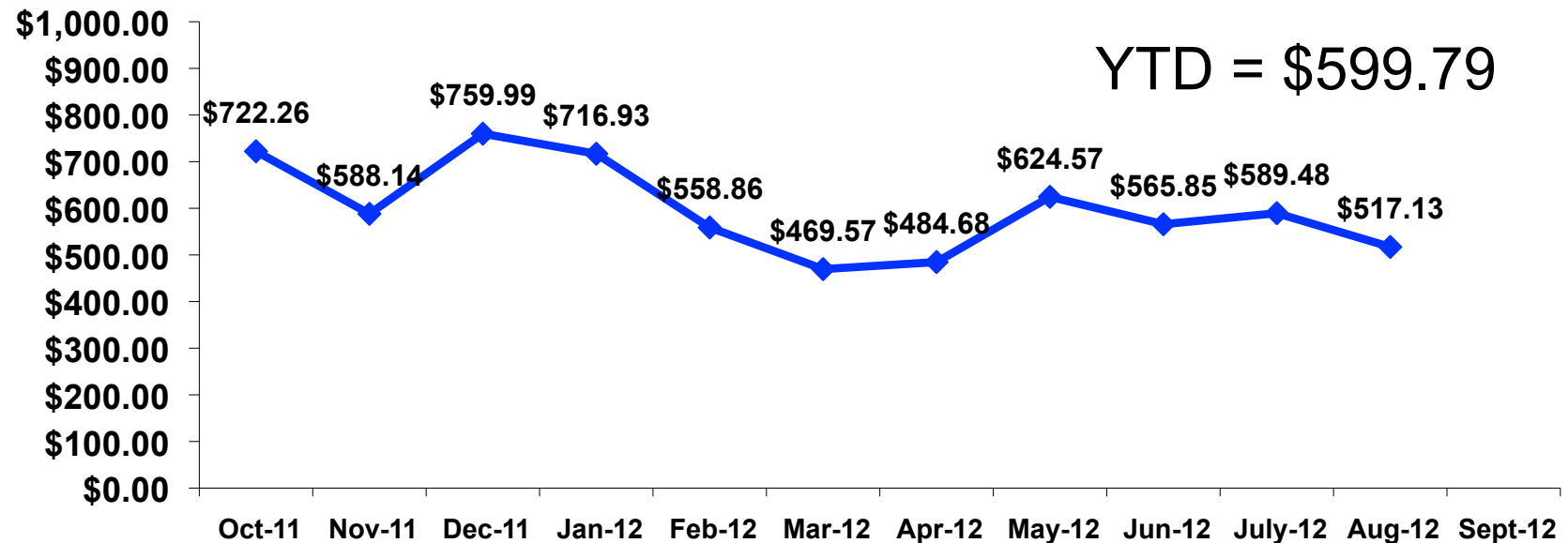
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Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Prepaid	Mean	\$1,292.78	\$1,277.03	\$1,235.19	\$1,096.96	\$1,687.44	\$1,112.94	\$1,314.32	\$1,280.83	\$1,292.59	\$1,274.93	\$2,127.19	\$1,163.93
per	Median	\$1,210	\$1,274	\$1,274	\$1,051	\$1,764	\$959	\$1,274	\$1,146	\$1,274	\$1,274	\$1,911	\$1,104
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$1,182.89	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,210.19	\$0.00
converted to \$	Maximum	\$4,458.60	\$3,184.71	\$2,547.77	\$2,123.14	\$2,038.22	\$2,929.94	\$4,458.60	\$4,458.60	\$3,184.71	\$3,184.71	\$4,458.60	\$3,184.71

On-Island Expenditures Tracking



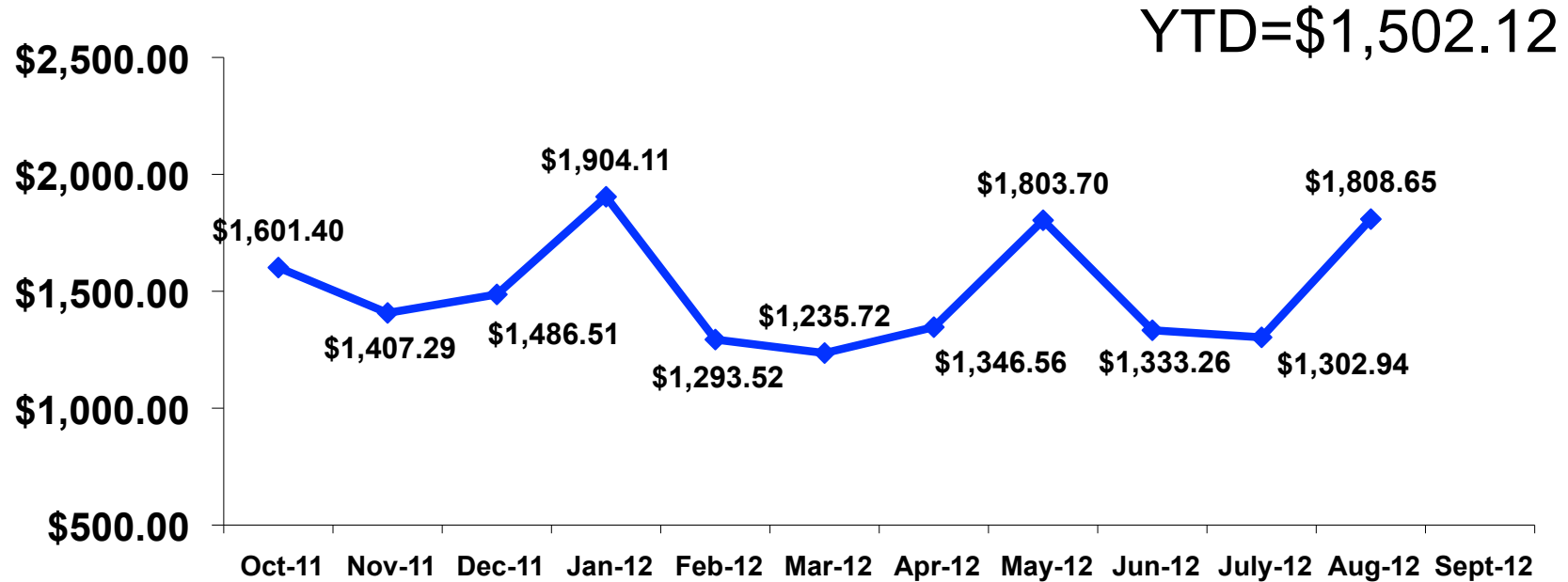
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Per person on-island exp	Mean	\$517.13	\$410.46	\$437.90	\$472.57	\$422.59	\$298.33	\$544.05	\$540.98	\$497.22	\$423.49	\$597.36	\$519.20
	Median	\$388	\$360	\$394	\$533	\$374	\$250	\$400	\$400	\$375	\$325	\$500	\$389
	Minimum	\$0.00	\$0.00	\$0.00	\$118.75	\$142.86	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$210.00	\$0.00
	Maximum	\$9,000.00	\$1,666.67	\$2,120.00	\$800.00	\$800.00	\$1,200.00	\$9,000.00	\$9,000.00	\$6,000.00	\$6,000.00	\$1,200.00	\$6,000.00

On-Island Expense Breakdown

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
F&B-HOTEL	Mean	\$50.78	\$79.71	\$20.32	\$40.83	\$62.50	\$62.50	\$47.37	\$27.25	\$71.72	\$67.72	\$53.00	\$62.64
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$24.00	\$0.00
F&B-FF REST/CONV	Mean	\$44.04	\$57.87	\$15.97	\$33.33	\$75.00	\$20.83	\$46.10	\$25.07	\$61.48	\$59.02	\$17.71	\$52.31
	Median	\$15.00	\$25.00	\$5.00	\$0.00	\$75.00	\$0.00	\$15.00	\$10.00	\$30.00	\$30.00	\$3.00	\$25.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$96.31	\$115.72	\$42.23	\$50.00	\$225.00	\$21.50	\$99.43	\$54.94	\$129.16	\$109.58	\$97.43	\$106.66
	Median	\$37.00	\$30.00	\$18.00	\$0.00	\$150.00	\$0.00	\$37.00	\$8.00	\$100.00	\$50.00	\$100.00	\$60.00
OPTIONAL TOUR	Mean	\$156.73	\$161.30	\$72.48	\$83.33	\$437.00	\$43.00	\$194.38	\$141.53	\$166.24	\$175.26	\$100.00	\$140.54
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$374.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$329.96	\$434.50	\$191.94	\$25.00	\$250.00	\$79.17	\$314.85	\$180.50	\$462.47	\$460.30	\$158.29	\$445.38
	Median	\$100.00	\$100.00	\$20.00	\$0.00	\$250.00	\$50.00	\$100.00	\$35.00	\$125.00	\$100.00	\$150.00	\$100.00
GIFT/ SOUV- F&F AT HOME	Mean	\$152.98	\$197.03	\$118.77	\$41.67	\$200.00	\$73.33	\$146.78	\$95.11	\$195.78	\$190.59	\$126.57	\$197.82
	Median	\$60.00	\$100.00	\$0.00	\$25.00	\$150.00	\$25.00	\$60.00	\$50.00	\$100.00	\$100.00	\$120.00	\$100.00
LOCAL TRANS	Mean	\$18.53	\$24.89	\$15.26	\$38.33	\$37.50	\$8.00	\$17.16	\$10.96	\$24.91	\$24.63	\$30.00	\$23.80
	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	\$308.48	\$363.59	\$245.35	\$700.00	\$1,188.00	\$65.00	\$298.12	\$251.99	\$346.78	\$397.74	\$440.29	\$278.07
	Median	\$0.00	\$0.00	\$0.00	\$500.00	\$750.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	\$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	\$1,808.65	\$1,687.49	\$1,656.94	\$1,569.53	\$2,110.03	\$1,411.27	\$1,856.75	\$1,821.86	\$1,787.09	\$1,698.42	\$2,724.54	\$1,679.57
per	Median	\$1,651.27	\$1,607.22	\$1,734.61	\$1,393.66	\$2,189.04	\$1,258.60	\$1,655.41	\$1,643.63	\$1,669.43	\$1,635.62	\$2,410.83	\$1,589.66
person	Minimum	\$.00	\$.00	\$.00	\$800.00	\$1,325.75	\$.00	\$.00	\$.00	\$.00	\$.00	\$1,420.19	\$.00
expense	Maximum	\$11,547.77	\$3,684.71	\$3,776.05	\$2,623.14	\$2,736.31	\$3,606.23	\$11,547.77	\$11,547.77	\$6,891.72	\$6,891.72	\$5,458.60	\$6,891.72

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, May, June, July, Aug 2012 and Overall Oct 2011 - Aug 2012												
	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Combined Oct 2011 - Aug 2012
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	2	2	1	1	3	2	2			4	3
Ease of getting around	6		6					5				6
Safety walking around at night												
Quality of daytime tours			5		4		3	3	3	1		4
Variety of daytime tours	2										3	
Quality of nighttime tours												
Variety of nighttime tours												8
Quality of shopping	4	1	7		2	2	4		1	2		1
Variety of shopping			1	2				6			1	7
Price of things on Guam	1	4	4					1				5
Quality of hotel accommodations	5	3	3	3	3	1	1	4	2	3	2	2
% of Overall Satisfaction Accounted For	49.9%	46.6%	50.2%	43.1%	43.9%	39.4%	46.2%	53.9%	49.6%	41.7%	46.1%	46.2%

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 August 2012 Period. By rank order they are:
 - **Variety of shopping,**
 - **Quality of hotel accommodations,**
 - **Variety of daytime tours, and**
 - **Cleanliness of beaches and parks.**
- With all four factors the overall r^2 is .46.1 meaning that **46.1% 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, May, June, July, August 2012 and Overall Oct 2011 - August 2012

	Oct-1	Nov-1	Dec-1	Jan-1	Feb-1	Mar-1	Apr-1	May-1	Jun-1	Jul-1	Aug-12	Combine d Oct 2011 - Aug 2012
Independent Variables:	rank	rank	rank	rank	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						1		
Quality of nighttime tours												
Variety of nighttime tours		2										3
Quality of shopping	1	1	1	2				1				1
Variety of shopping												
Price of things on Guam									1			
Quality of hotel accommodations	2			1				2				2
% of Overall Satisfaction Accounted For	9.2%	8.1%	2.2%	4.8%	0.0%	2.5%	0.0%	5.7%	1.7%	2.6%	0.0%	2.7%

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 August 2012 Period.