



# **GUAM VISITORS BUREAU**

## **Japan Visitor Tracker Exit Profile**

### **FY2010 MARKET SEGMENTATION –**

### **DECEMBER 2009**



**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 **330** 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 **330** 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

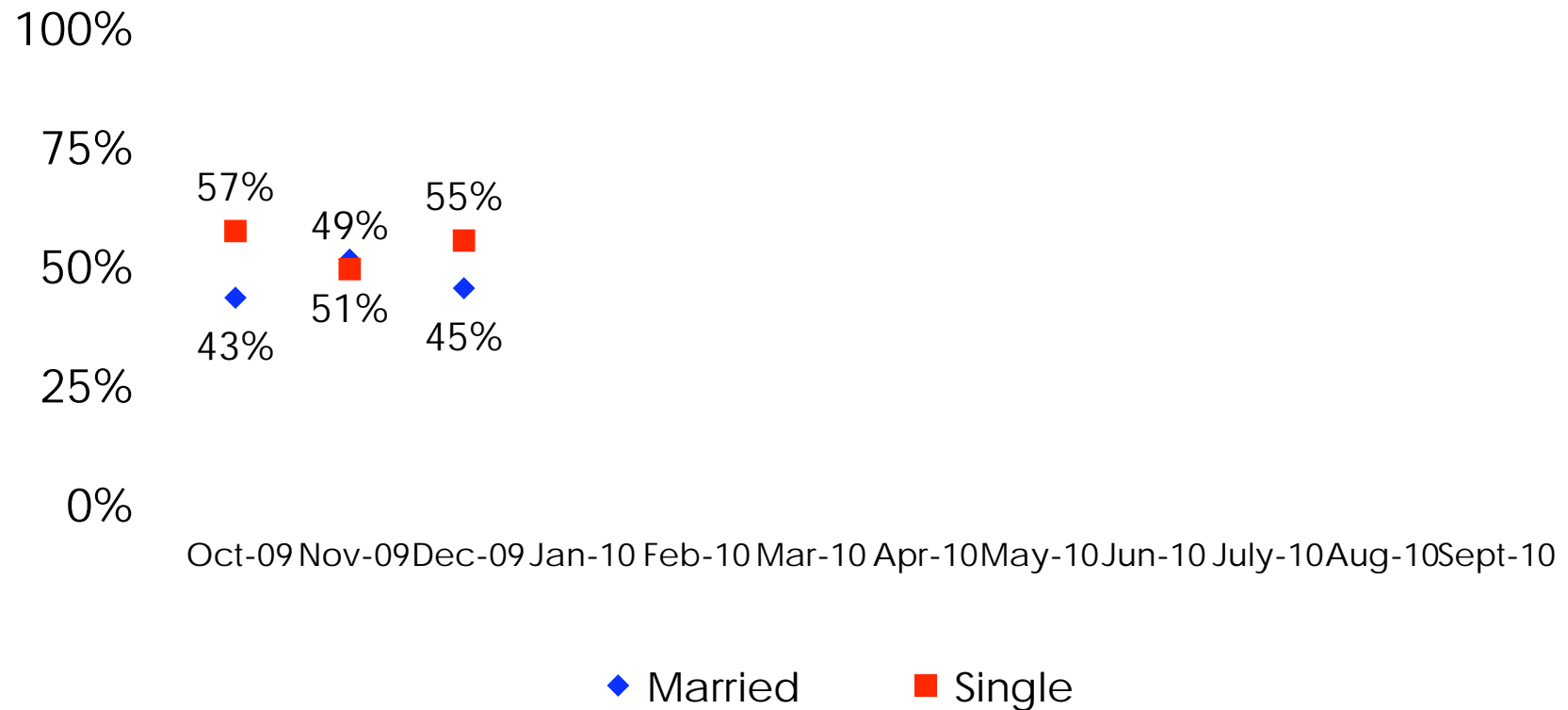
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

# Highlighted Segments

	Oct 09	Nov 09	Dec 09	Jan 10	Feb 10	Mar 10	Apr 10	May 10	Jun 10	July 10	Aug 10	Sept 10
Families	21%	22%	21%									
Repeaters	40%	33%	40%									
Shoppers	49%	52%	46%									
Seniors	5%	6%	9%									
OL/Salary- woman	15%	12%	12%									
Group Travelers	3%	7%	3%									
Students	9%	10%	16%									
Golfers	4%	6%	6%									
Wedding	8%	12%	7%									
Divers	6%	12%	10%									
Honey- mooners	11%	9%	8%									
TOTAL	328	330	330									

# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Tracking

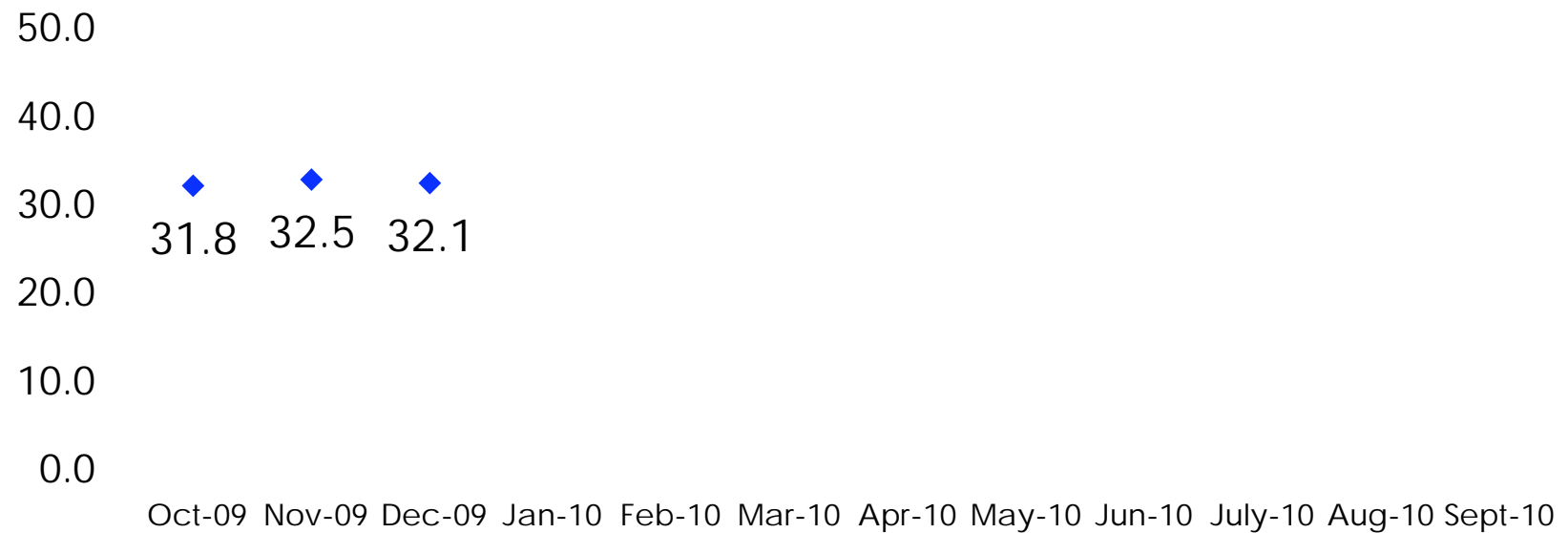


# Marital Status - Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR	
C. Married	Count	148	42	77	63	8	5	2	11	11	25	12	26
	Col %	45%	62%	59%	41%	20%	56%	4%	58%	50%	96%	35%	90%
Single	Count	180	26	54	89	32	4	52	8	11	1	22	3
	Col %	55%	38%	41%	59%	80%	44%	96%	42%	50%	4%	65%	10%
Total	Count	328	68	131	152	40	9	54	19	22	26	34	29



# Average Age - Tracking



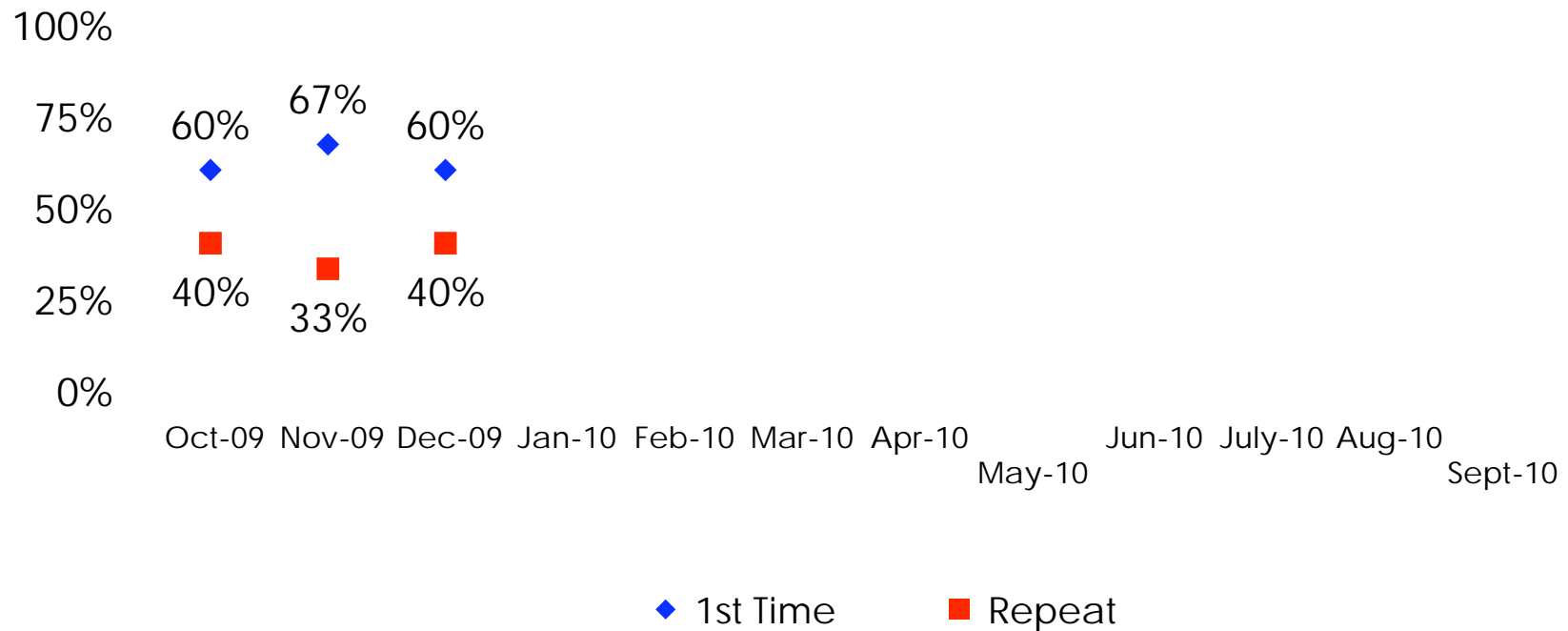
# Age - Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	227	35	62	112	34	5	54	8	16	24	25	
		Col %	69%	51%	47%	73%	85%	56%	100%	42%	73%	92%	74%	
	35-54	Count	86	27	62	33	6	3		6	3	2	8	12
		Col %	26%	40%	47%	22%	15%	33%		32%	14%	8%	24%	41%
	55+	Count	17	6	8	8		1		5	3		1	17
		Col %	5%	9%	6%	5%		11%		26%	14%		3%	59%
Total	Count		330	68	132	153	40	9	54	19	22	26	34	29
D.	Mean		32.1	36.9	36.7	31.2	30.0	33.9	21.6	40.7	34.3	27.5	31.2	56.4
	Median		30	34	35	29	29	29	22	37	30	27	31	55

# Income - Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than Y2 million	Count	21	3	5	11	2		7		1	1	1	1
		Col %	7%	5%	4%	8%	5%		15%		5%	4%	3%	4%
	Y2,000,001 - Y3,000,000	Count	39	6	12	22	11		2		3	8	4	2
		Col %	13%	9%	9%	15%	29%		4%		14%	32%	13%	7%
	Y3,000,001 - Y4,000,000	Count	42	3	15	22	9	3	6	2		3	2	1
		Col %	14%	5%	12%	15%	24%	33%	13%	12%		12%	6%	4%
	Y4,000,001 - Y5,000,000	Count	37	9	15	17	4	2	2	1	4	4	2	2
		Col %	12%	14%	12%	12%	11%	22%	4%	6%	19%	16%	6%	7%
	Y5,000,001 - Y7,000,000	Count	55	16	25	25	3	2	7	5	4	6	14	5
		Col %	18%	25%	20%	17%	8%	22%	15%	29%	19%	24%	44%	19%
	Y7,000,001 - Y10,000,000	Count	43	16	22	24	6	1	5	3	5	2	2	3
		Col %	14%	25%	17%	17%	16%	11%	11%	18%	24%	8%	6%	11%
	Y10,000,001 or more	Count	57	10	30	22	3	1	15	5	3	1	7	12
		Col %	19%	16%	24%	15%	8%	11%	33%	29%	14%	4%	22%	44%
	No Income	Count	6	1	3	1			2	1	1			1
		Col %	2%	2%	2%	1%			4%	6%	5%			4%
Total	Count		300	64	127	144	38	9	46	17	21	25	32	27

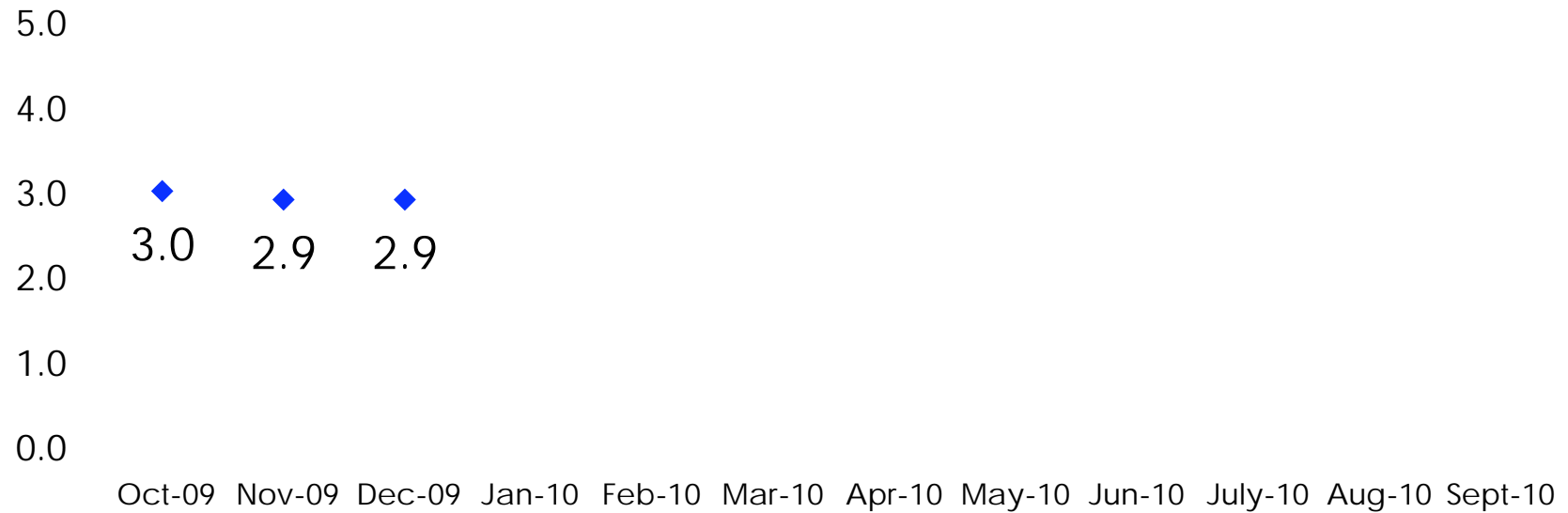
# Prior Trips to Guam - Tracking



# Prior Trips to Guam - Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		198	30		96	25	4	45	7	16	23	19	12
	Col %		60%	44%		63%	63%	44%	83%	37%	73%	88%	56%	41%
No	Count		132	38	132	57	15	5	9	12	6	3	15	17
	Col %		40%	56%	100%	37%	38%	56%	17%	63%	27%	12%	44%	59%
Total	Count		330	68	132	153	40	9	54	19	22	26	34	29

# 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	2.9	2.9	3.0	3.0	2.5	2.8	2.8	3.8	3.6	3.6	2.9	3.4
Median	3	3	3	3	3	3	3	3	4	4	3	3
Minimum	1	1	1	1	1	2	2	2	2	2	2	1
Maximum	22	6	22	22	4	4	4	22	6	5	6	22

# 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	63	12	27	35	6		11	2	4	8	6	1
		Col %	19%	18%	20%	23%	15%		20%	11%	18%	31%	18%	3%
	Free-time package tours	Count	220	45	77	101	30		38	11	14	18	24	20
		Col %	67%	66%	58%	66%	77%		70%	58%	64%	69%	71%	59%
	Individually arranged travel	Count	33	6	23	11	2		2	4	2		3	7
		Col %	10%	9%	17%	7%	5%		4%	21%	9%		9%	24%
	Group tour	Count	9	3	5	3	1	9	3	2	1			1
		Col %	3%	4%	4%	2%	3%	100%	6%	11%	5%			3%
	Other	Count	4	2		3					1		1	
		Col %	1%	3%		2%					5%		3%	
Total	Count		329	68	132	153	39	9	54	19	22	26	34	29

# Travel Motivation - Segmentation

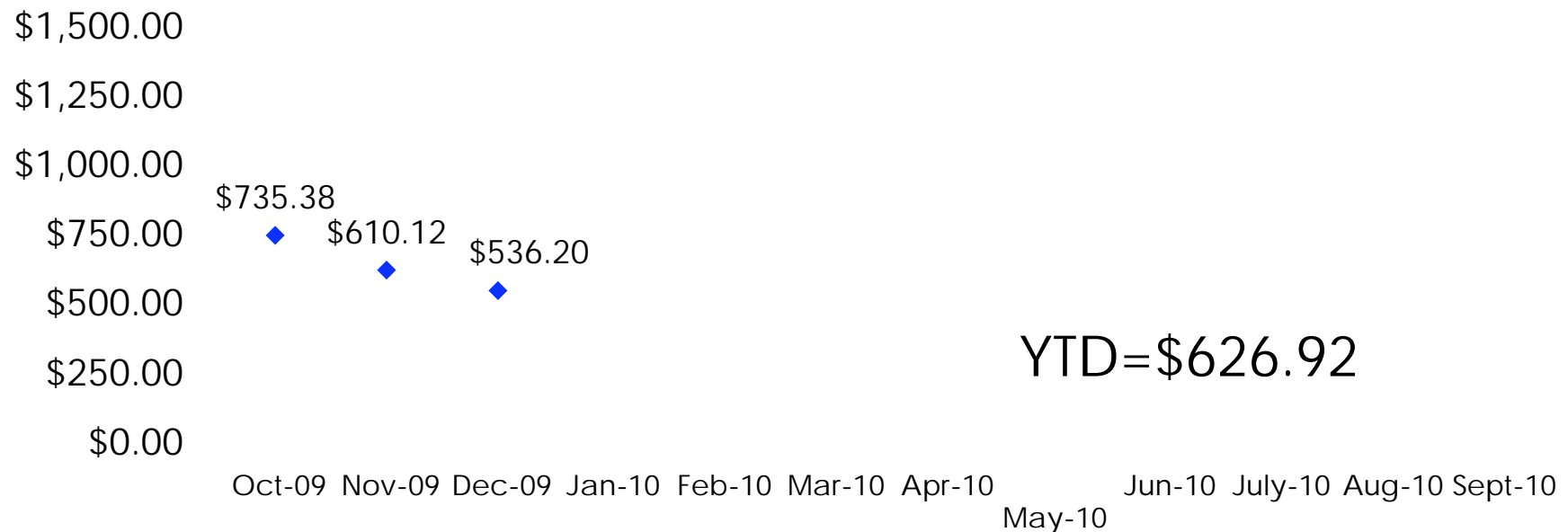
	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Beautiful seas, beaches, tropical climate	55%	53%	49%	56%	58%	11%	59%	42%	27%	50%	50%	34%
Price of the tour package	43%	47%	42%	48%	50%	11%	57%	26%	14%	15%	38%	28%
Short travel time	40%	50%	42%	41%	58%	22%	24%	26%	14%	31%	24%	41%
Pleasure	39%	37%	39%	44%	48%	44%	43%	26%		19%	32%	24%
A previous visit	27%	44%	68%	25%	30%	33%	13%	37%	14%	12%	29%	28%
Just to relax	31%	34%	38%	36%	40%	22%	28%	21%		4%	24%	41%
Shopping	31%	35%	34%	32%	48%		28%	26%	5%	15%	26%	24%
Recommendation of friend, relative, travel agency	16%	6%	8%	16%	25%	33%	28%	11%	14%	19%	18%	3%
It is a safe place to spend a vacation	13%	15%	16%	14%	18%	11%	7%	21%	5%	19%	9%	17%
Water sports	12%	9%	10%	16%	18%		13%	11%	5%	12%	15%	3%
To get married or Attend wedding	7%	19%	5%	7%	5%	11%	2%		100%	15%	3%	10%
Honeymoon	8%	3%	2%	9%	3%				18%	100%	15%	
SCUBA diving	6%	4%	8%	3%	5%		2%			15%	44%	10%
To golf	5%	3%	11%	5%	3%	22%	2%	68%				21%
Company or Business trip	4%	1%	4%	4%	3%	44%	6%	26%			6%	3%
Other	4%	4%	4%	5%			7%				15%	
Organized Sporting Activity	2%	1%	2%	2%	3%		2%	5%			6%	3%
To visit friends or relatives	2%		1%	2%						4%		
Career certification or testing	1%		2%									3%
Special promotion	1%									4%	3%	3%
Promotional materials from GVB	1%	1%										
My company sponsored me	0%			1%								
Total Cases	330	68	132	153	40	9	54	19	22	26	34	29

# Information Sources - Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1 Internet	66%	66%	70%	64%	73%	33%	64%	68%	50%	44%	59%	54%
Travel guide book at bookstores	55%	58%	45%	60%	63%	22%	64%	42%	41%	56%	59%	39%
I have been to Guam before	41%	57%	100%	38%	38%	56%	17%	63%	27%	12%	44%	61%
Travel agent brochure	42%	39%	35%	50%	28%	44%	47%	26%	50%	64%	44%	39%
Magazine	17%	18%	13%	20%	15%	11%	23%	16%	32%	24%	12%	11%
Friend or relative	18%	6%	8%	16%	18%	11%	25%	5%	23%	28%	18%	4%
TV	6%	6%	5%	6%	5%		9%		14%	4%	3%	11%
Company travel department	3%	4%	2%	1%	8%	11%		5%	9%	8%		4%
GVB promotional activities	2%		2%	3%			4%	5%			3%	
Newspaper	2%	1%	1%	1%			6%					
Other	2%		1%	2%				5%				4%
GVB office	0%			1%								
Total Cases	324	67	132	149	40	9	53	19	22	25	34	28

# SECTION 3 **EXPENDITURES**

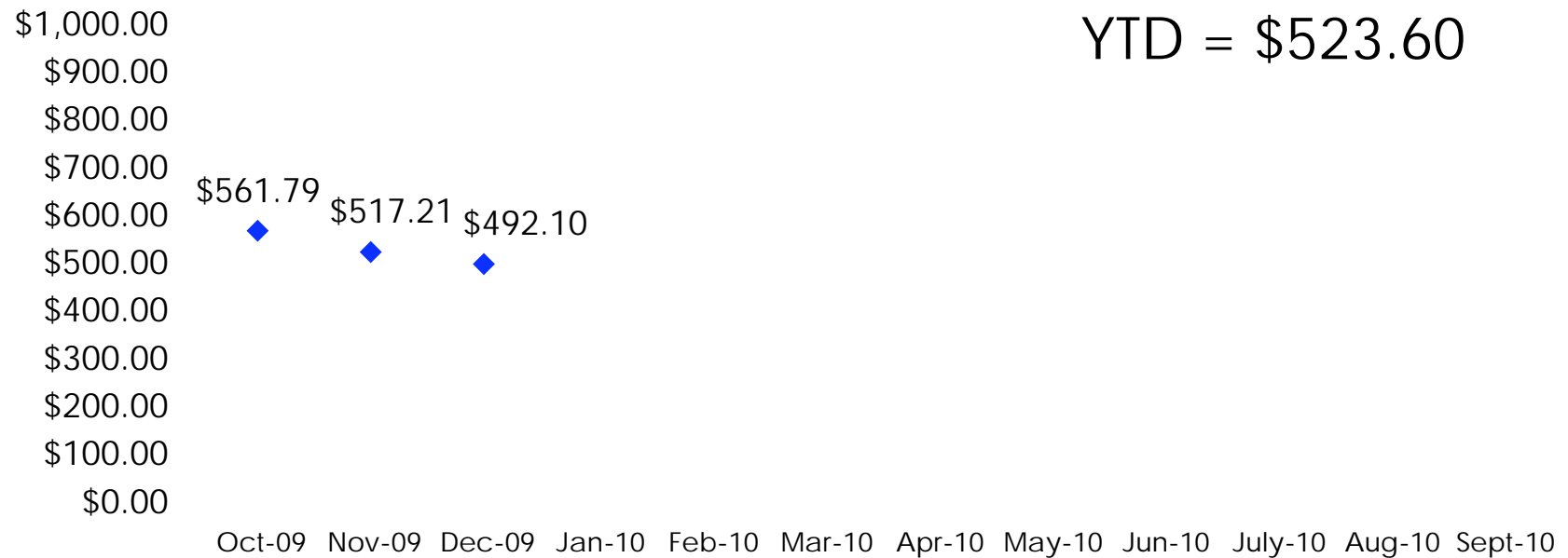
# Prepaid Expenditures - Tracking



# Prepaid Expenditures Per Person -Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid	Mean	\$536.20	\$542.14	\$476.56	\$613.62	\$468.43	\$678.69	\$460.06	\$561.69	\$797.77	\$1,268.76	\$546.58	\$467.67
per	Median	\$434	\$396	\$451	\$451	\$439	\$687	\$400	\$338	\$575	\$1,155	\$451	\$448
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$135.20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
converted to \$	Maximum	\$3,379.90	\$3,379.90	\$1,802.61	\$3,379.90	\$1,689.95	\$1,351.96	\$1,126.63	\$1,802.61	\$3,379.90	\$3,379.90	\$3,379.90	\$1,689.95

# On-Island Expenditures - Tracking



# On-Island Expenditures Per Person - Segmentation

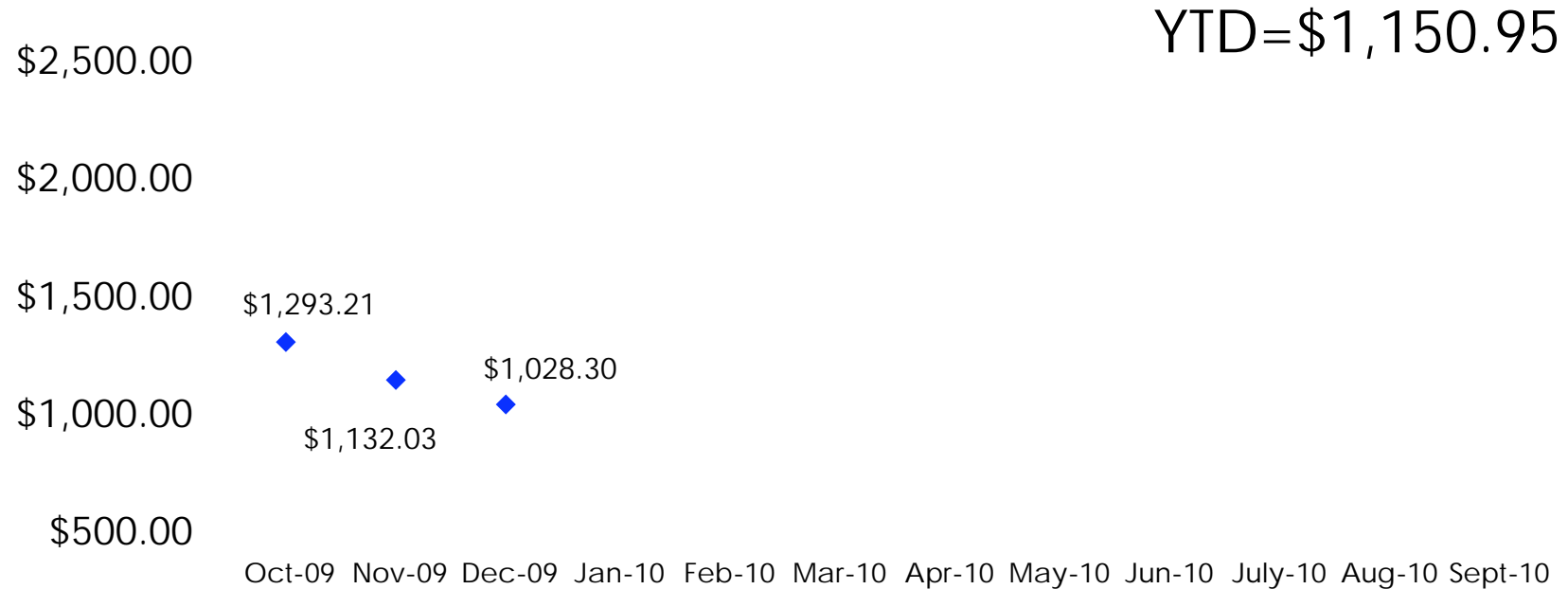
		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$492.10	\$410.24	\$482.65	\$511.64	\$681.29	\$436.87	\$405.19	\$729.47	\$550.28	\$785.42	\$584.56	\$593.49
	Median	\$365	\$299	\$332	\$350	\$600	\$300	\$300	\$600	\$392	\$550	\$500	\$450
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2.50	\$0.00	\$176.00	\$90.00	\$150.00	\$0.00	\$66.00
	Maximum	\$2,000.00	\$1,895.00	\$2,000.00	\$2,000.00	\$1,895.00	\$1,000.00	\$1,500.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00



# On-Island Expense - Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$24.10	\$40.22	\$32.82	\$23.68	\$19.80	\$15.56	\$9.94	\$23.42	\$56.82	\$37.12	\$22.21	\$45.34
	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
F&B-FF REST/CONV	Mean	\$33.43	\$41.88	\$32.28	\$29.32	\$23.51	\$12.22	\$33.89	\$25.39	\$31.36	\$18.85	\$13.21	\$20.66
	Median	\$10.00	\$17.50	\$10.00	\$15.00	\$10.00	\$0.00	\$18.00	\$7.50	\$10.00	\$0.00	\$8.50	\$0.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$77.04	\$102.24	\$84.16	\$76.82	\$64.83	\$88.89	\$55.72	\$127.21	\$147.45	\$81.35	\$56.18	\$140.41
	Median	\$30.00	\$38.00	\$45.00	\$50.00	\$45.00	\$20.00	\$50.00	\$50.00	\$40.00	\$0.00	\$25.00	\$40.00
OPTIONAL TOUR	Mean	\$84.71	\$91.93	\$95.57	\$84.37	\$83.83	\$11.11	\$46.89	\$266.53	\$155.45	\$155.19	\$120.24	\$155.83
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$13.50	\$90.00	\$0.00	\$25.00	\$80.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$202.89	\$293.65	\$197.93	\$208.92	\$365.05	\$344.44	\$140.78	\$193.95	\$159.55	\$314.42	\$317.35	\$179.31
	Median	\$47.00	\$50.00	\$50.00	\$25.00	\$150.00	\$0.00	\$50.00	\$50.00	\$40.00	\$75.00	\$20.00	\$0.00
GIFT/ SOUV- F&F AT HOME	Mean	\$135.49	\$85.13	\$133.52	\$129.01	\$122.50	\$101.11	\$68.85	\$191.84	\$277.73	\$260.42	\$120.56	\$203.79
	Median	\$50.00	\$50.00	\$50.00	\$50.00	\$52.00	\$60.00	\$40.00	\$50.00	\$100.00	\$100.00	\$50.00	\$50.00
LOCAL TRANS	Mean	\$11.29	\$9.28	\$14.89	\$7.68	\$12.68	\$5.22	\$12.26	\$13.47	\$11.82	\$6.62	\$9.82	\$9.72
	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	\$234.84	\$283.11	\$231.84	\$247.72	\$255.44	\$222.67	\$107.30	\$139.45	\$312.73	\$589.19	\$203.68	\$183.97
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5.00	\$0.00	\$0.00	\$0.00	\$242.50	\$2.50	\$0.00

# Total Expenditures - Tracking



# Total Expenditures Per Person - Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Total per person expense	Mean	\$1,028.30	\$952.39	\$959.21	\$1,125.26	\$1,149.72	\$1,115.56	\$865.25	\$1,291.16	\$1,348.05	\$2,054.19	\$1,131.14	\$1,061.16
	Median	\$851.57	\$773.33	\$847.43	\$904.19	\$1,072.76	\$1,346.63	\$687.42	\$985.00	\$1,100.66	\$1,841.11	\$956.99	\$887.85
	Minimum	\$ .00	\$ .00	\$ .00	\$ .00	\$417.99	\$2.50	\$166.74	\$176.00	\$300.00	\$150.00	\$ .00	\$65.00
	Maximum	\$5,379.90	\$3,879.90	\$3,689.95	\$5,379.90	\$2,564.62	\$1,951.96	\$2,026.63	\$3,689.95	\$3,879.90	\$5,379.90	\$5,379.90	\$3,689.95

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 2009 and Overall Oct-Dec 2009

	Oct-09	Nov-09	Dec-09	Combined Oct - Dec 2009
Independent Variables:	rank	rank	rank	rank
Cleanliness of beaches & parks	4		3	5
Ease of getting around		2	4	4
Safety walking around at night				
Quality of daytime tours		3		3
Variety of daytime tours	3			
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping	1	4		
Variety of shopping			2	2
Price of things on Guam				6
Quality of hotel accommodations	2	1	1	1
% of Overall Satisfaction Accounted For	52.1%	46.7%	49.2%	50.0%

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 December 2009 Period by rank order they are):
  - Quality of hotel accommodations,
  - Variety of shopping,
  - Cleanliness of beaches and parks,
  - Ease of getting around.
- With all four factors the overall  $r^2$  is .492 meaning that 49.2% of overall satisfaction is accounted for by these four factors.

#:

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2009 and Overall Oct - Dec 2009

	Oct-09	Nov-09	Dec-09	Combined Oct - Dec 2009
Independent Variables:	rank	rank	rank	rank
Cleanliness of beaches & parks				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		1		
Quality of shopping			1	1
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations				
% of Overall Satisfaction Accounted For	0.0%	1.5%	2.8%	1.7%

NOTE: Only significant variables are ranked.



---

# Drivers of Per Person On Island Expenditure

- In the December 2009 period, there was only one significant driver of Japanese visitor's Per person on-island expenditure. That driver is:
  - Quality of shopping.
- In December 2009, Quality of shopping accounted for 2.8% of the Japanese visitors' per person on-island expenditure.