



**GUAM VISITORS BUREAU
Japan Visitor Tracker Exit Profile
FY2010 MARKET SEGMENTATION –
FEBRUARY 2010**



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 **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

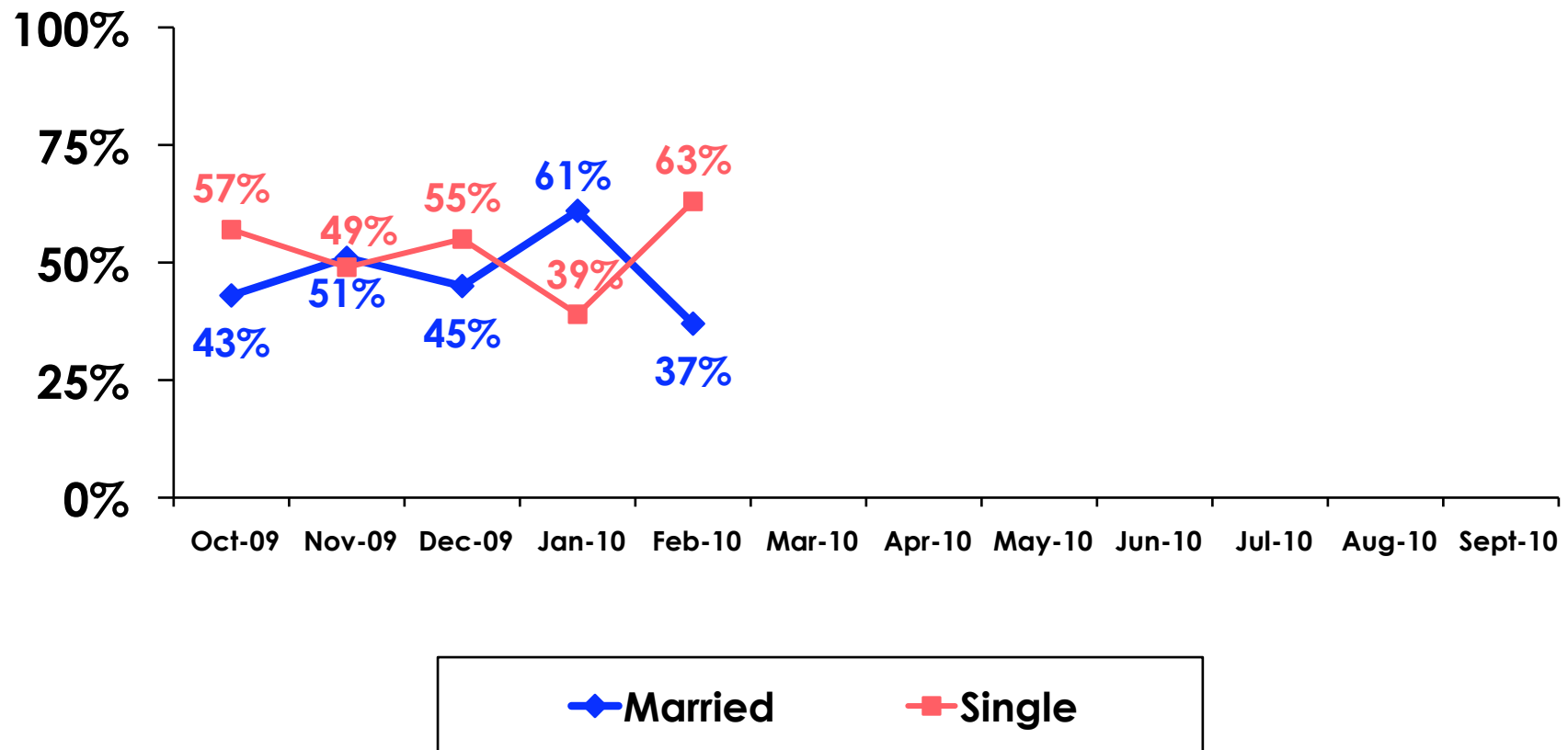
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

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%	25%	24%							
Repeaters	40%	33%	40%	42%	38%							
Shoppers	49%	52%	46%	49%	47%							
Seniors	5%	6%	9%	8%	7%							
OL/Salary-woman	15%	12%	12%	13%	11%							
Group Travelers	3%	7%	3%	4%	4%							
Students	9%	10%	16%	10%	29%							
Golfers	4%	6%	6%	6%	5%							
Wedding	8%	12%	7%	8%	6%							
Divers	6%	12%	10%	11%	10%							
Honey-mooner	11%	9%	8%	7%	4%							
TOTAL	328	330	330	330	330							

SECTION 1 **PROFILE OF RESPONDENTS**

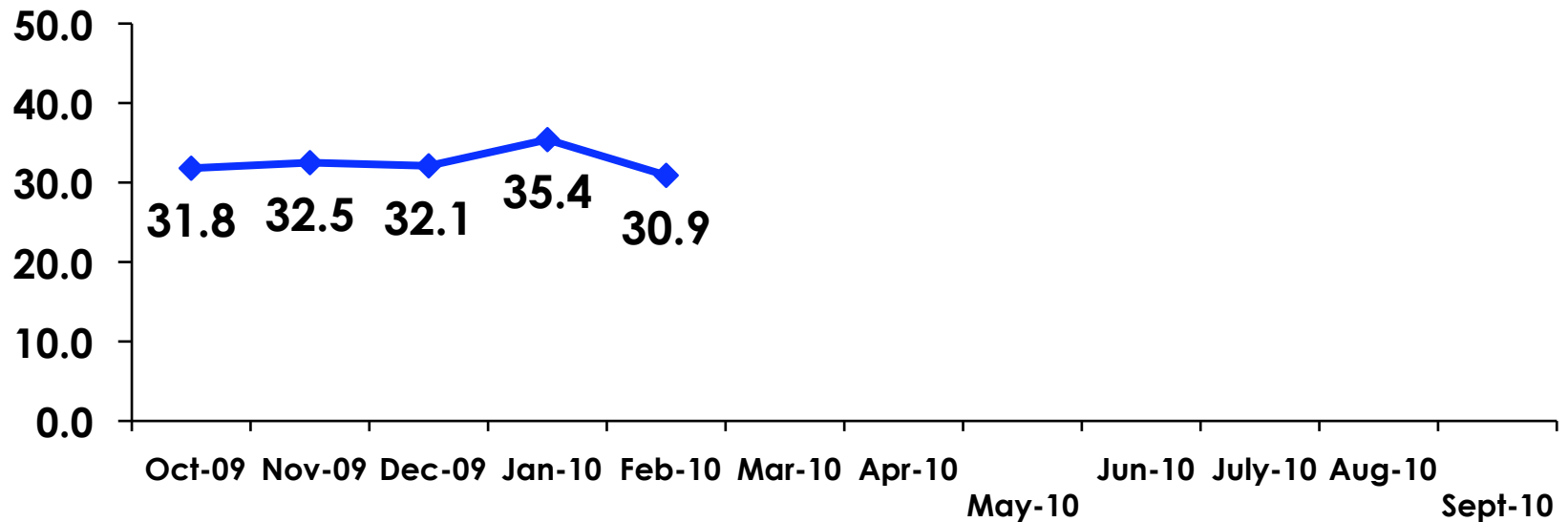
Marital Status Tracking



Marital Status Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
C. Married	Count	123	65	70	50	6	5		6	10	14	7	23
	Col %	37%	82%	56%	32%	17%	36%		38%	53%	100%	22%	100%
Single	Count	207	14	56	105	30	9	94	10	9		25	
	Col %	63%	18%	44%	68%	83%	64%	100%	63%	47%		78%	
Total	Count	330	79	126	155	36	14	94	16	19	14	32	23

Average Age Tracking



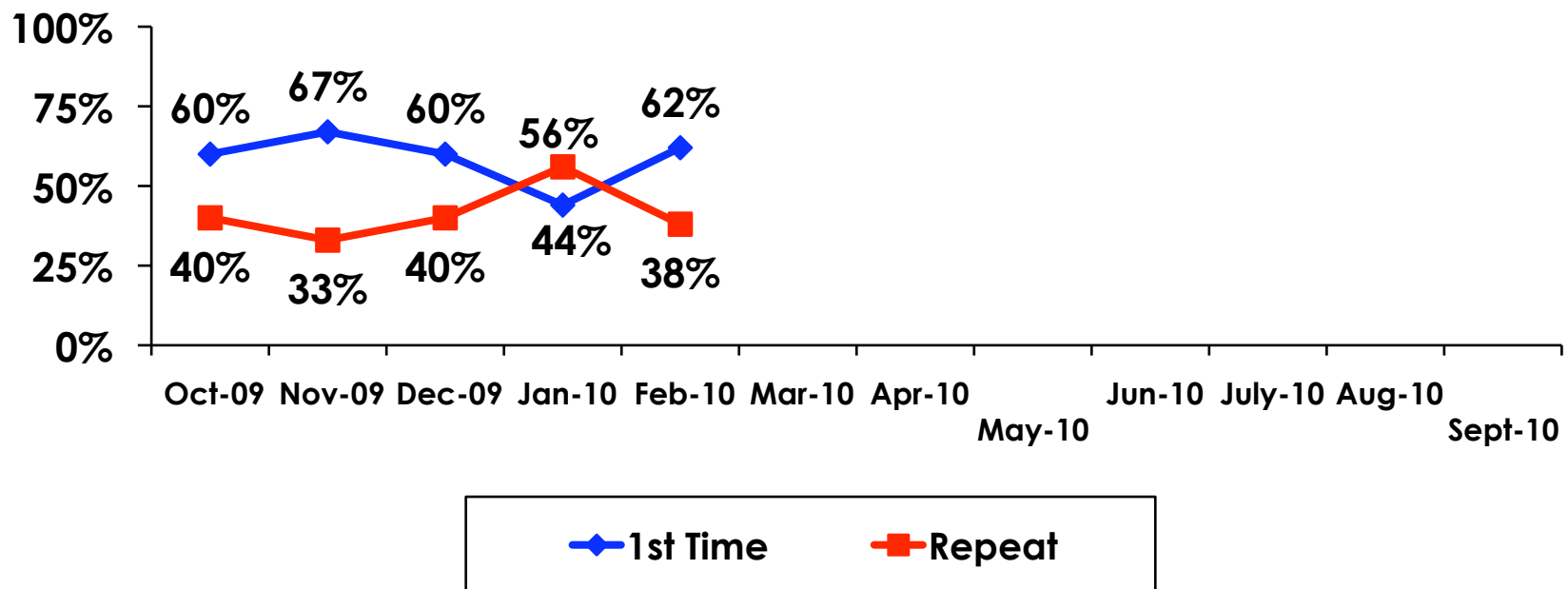
Age Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	228	25	56	114	26	9	94	10	15	13	26
		Col %	69%	32%	44%	74%	72%	64%	100%	63%	79%	93%	81%
	35-54	Count	84	45	61	31	10	3		4	3	1	4
		Col %	25%	57%	48%	20%	28%	21%		25%	16%	7%	13%
	55+	Count	18	9	9	10		2		2	1		2
		Col %	5%	11%	7%	6%		14%		13%	5%		6%
Total	Count		330	79	126	155	36	14	94	16	19	14	32
D.	Mean		30.9	39.0	35.7	30.4	30.5	32.2	21.7	33.4	31.6	29.6	28.6
	Median		28	38	35	27	29	30	22	28	31	30	27

Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 31	Less than Y2 million	Count	22	3	6	13	2		14	1	1		1	1
		Col %	8%	4%	5%	10%	6%		20%	7%	6%		3%	5%
	Y2,000,001 - Y3,000,000	Count	25	4	3	15	6	1	3	1	1	1	3	2
		Col %	9%	6%	3%	11%	18%	9%	4%	7%	6%	8%	10%	11%
	Y3,000,001 - Y4,000,000	Count	39	7	15	20	4	3	5	2	4	2	6	2
		Col %	14%	10%	13%	15%	12%	27%	7%	13%	24%	15%	20%	11%
	Y4,000,001 - Y5,000,000	Count	46	7	17	21	10	1	4	4	4	5	6	1
		Col %	16%	10%	15%	16%	30%	9%	6%	27%	24%	38%	20%	5%
	Y5,000,001 - Y7,000,000	Count	53	13	22	29	4	2	15	4	3	3	5	5
		Col %	19%	19%	20%	21%	12%	18%	22%	27%	18%	23%	17%	26%
	Y7,000,001 - Y10,000,000	Count	39	19	20	11	1	2	5	2	3	1	3	7
		Col %	14%	27%	18%	8%	3%	18%	7%	13%	18%	8%	10%	37%
	Y10,000,001 or more	Count	45	17	27	20	6	2	6		1	1	4	1
		Col %	16%	24%	24%	15%	18%	18%	9%		6%	8%	13%	5%
	No Income	Count	17		2	6			17	1			2	
		Col %	6%		2%	4%			25%	7%			7%	
Total	Count	286	70	112	135	33	11	69	15	17	13	30	19	

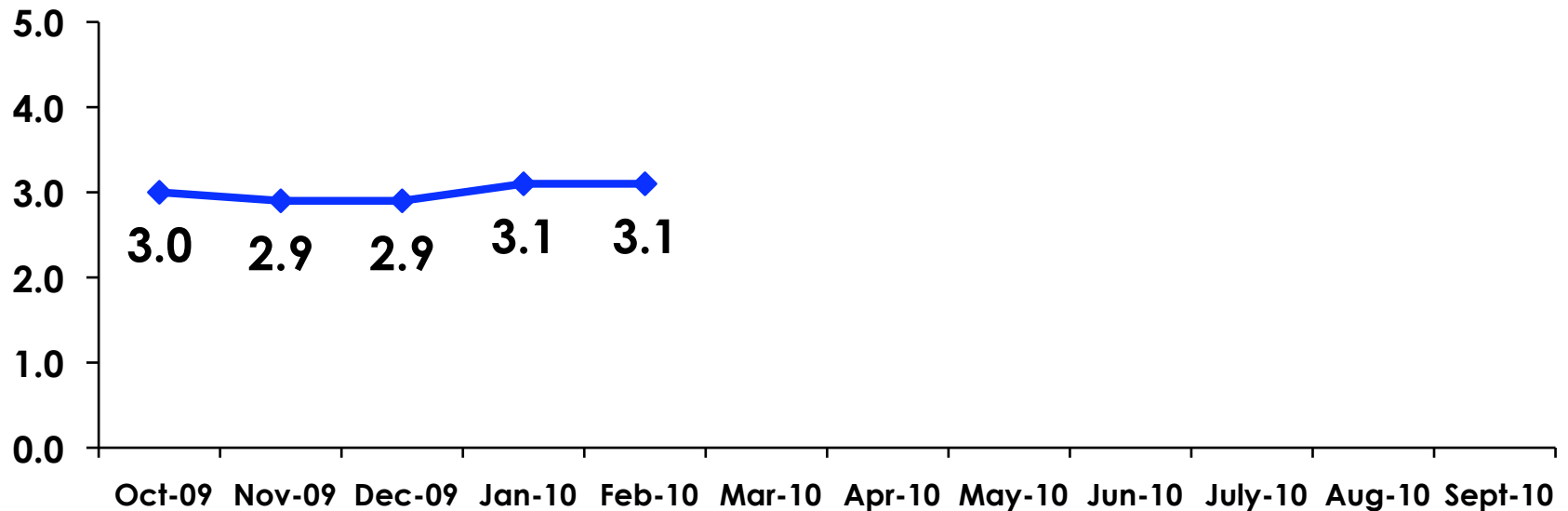
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		204	35		107	16	6	79	11	13	10	22	13
	Col %		62%	44%		69%	44%	43%	84%	69%	68%	71%	69%	57%
No	Count		126	44	126	48	20	8	15	5	6	4	10	10
	Col %		38%	56%	100%	31%	56%	57%	16%	31%	32%	29%	31%	43%
Total	Count		330	79	126	155	36	14	94	16	19	14	32	23

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	3.1	3.3	3.2	3.0	2.9	4.0	3.0	3.0	3.2	3.9	3.2	3.0
Median	3	3	3	3	3	3	3	3	3	4	3	3
Minimum	1	2	1	1	2	2	1	2	1	3	2	2
Maximum	12	7	10	7	5	12	12	4	4	4	8	6

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	16	16	34	6		20	4	7	6	2	2
		Col %	19%	20%	13%	22%	17%		22%	25%	37%	43%	6%	9%
	Free-time package tours	Count	211	44	73	92	23		67	11	11	7	26	15
		Col %	64%	56%	58%	59%	64%		73%	69%	58%	50%	81%	55%
	Individually arranged travel	Count	38	15	28	23	6		3	1	1		3	3
		Col %	12%	19%	22%	15%	17%		3%	6%	5%		9%	13%
	Group tour	Count	14	3	8	4	1	14	2			1	1	2
		Col %	4%	4%	6%	3%	3%	100%	2%			7%	3%	9%
	Other	Count	2	1	1	2								1
		Col %	1%	1%	1%	1%								4%
Total	Count	328	79	126	155	36	14	92	16	19	14	32	23	

Travel Motivation Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Beautiful seas, beaches, tropical climate	57%	54%	58%	60%	58%	29%	66%	56%	42%	57%	47%	39%
Short travel time	48%	57%	48%	45%	42%	21%	49%	56%	11%	36%	31%	61%
Pleasure	42%	44%	40%	45%	42%		52%	38%	26%	21%	22%	35%
A previous visit	30%	44%	79%	26%	47%	50%	11%	25%	16%	29%	19%	35%
Price of the tour package	35%	33%	29%	35%	36%	7%	44%	38%	16%	14%	28%	43%
Just to relax	35%	42%	39%	33%	31%		33%	13%	5%	7%	13%	13%
Shopping	29%	34%	29%	34%	33%	7%	36%	25%	21%	29%	19%	13%
Recommendation of friend, relative, travel agency	21%	16%	13%	26%	19%	21%	32%	13%			13%	17%
Water sports	19%	16%	14%	20%	11%	7%	26%	25%	11%	21%	22%	17%
It is a safe place to spend a vacation	17%	18%	22%	16%	17%		18%	25%		29%	6%	17%
To get married or Attend wedding	6%	6%	5%	7%	3%				100%	29%	3%	4%
SCUBA diving	6%	1%	6%	6%	11%	7%	3%	6%			50%	9%
Other	5%	5%	5%	5%	3%		6%	6%			13%	13%
Honeymoon	4%	1%	3%	5%		7%		6%	21%	100%	3%	
To golf	4%	1%	8%	3%	6%			38%		14%	3%	22%
Company or Business trip	4%	1%	4%	3%	8%	43%	1%	6%		7%		
Organized Sporting Activity	2%	1%	2%	2%		14%	2%					4%
To visit friends or relatives	1%	1%	2%	1%	3%			6%		7%		4%
My company sponsored me	1%	3%	2%	1%		14%						
Special promotion	1%	1%	1%	1%				6%			3%	
Career certification or testing	1%		2%	1%								
Promotional materials from GVB	0%	1%	1%	1%								
Total Cases	330	79	126	155	36	14	94	16	19	14	32	23

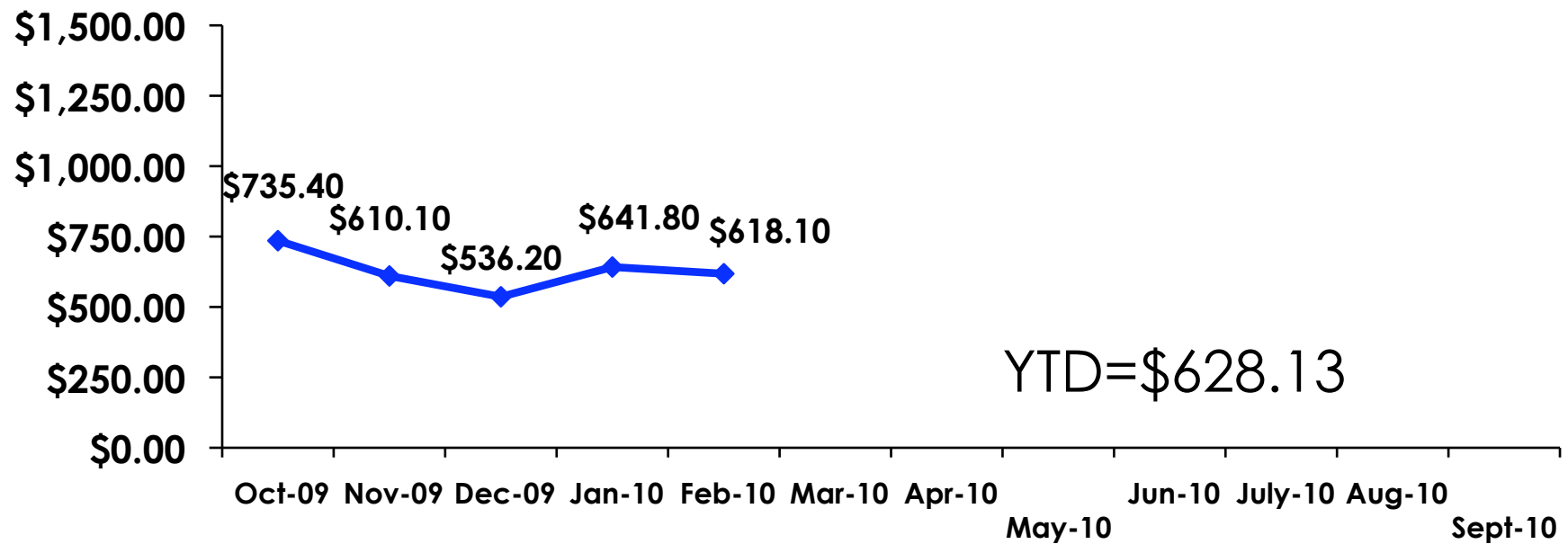
Information Sources

Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1 Internet	68%	63%	69%	68%	75%	46%	71%	56%	53%	71%	60%	41%
Travel guide book at bookstores	63%	65%	55%	62%	47%	46%	61%	63%	58%	86%	53%	59%
Travel agent brochure	47%	45%	38%	55%	44%	31%	57%	38%	42%	71%	50%	45%
I have been to Guam before	33%	45%	86%	27%	47%	46%	15%	31%	26%	29%	27%	45%
Friend or relative	25%	17%	14%	29%	25%	31%	37%	19%	11%	21%	13%	23%
Magazine	22%	28%	13%	21%	19%	15%	20%	13%	21%	36%	10%	27%
TV	11%	12%	8%	12%	3%	8%	20%	19%	5%	7%	13%	9%
Newspaper	2%	5%	3%	3%			2%	6%			3%	18%
Company travel department	3%	1%	2%	3%	8%	8%		6%	5%	7%	3%	
Other	1%	4%	2%	2%	3%	8%						9%
GVB office	1%	3%	2%	2%			1%	6%				5%
GVB promotional activities	1%		1%					6%				5%
Total Cases	324	78	125	154	36	13	92	16	19	14	30	22

SECTION 3 **EXPENDITURES**

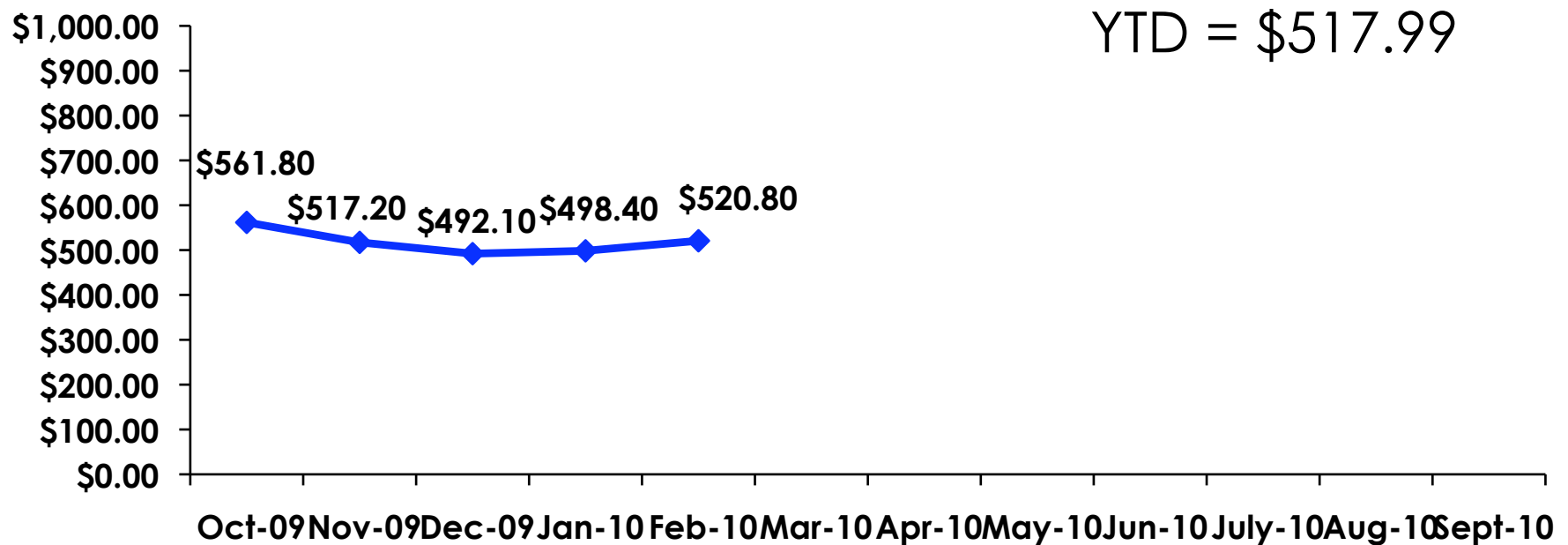
Prepaid Expenditures Tracking



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid	Mean	\$618.09	\$623.25	\$623.08	\$625.00	\$552.64	\$366.22	\$498.70	\$668.19	\$924.00	\$1,158.57	\$613.73	\$699.69
per	Median	\$556	\$589	\$556	\$519	\$567	\$0	\$445	\$556	\$667	\$1,140	\$535	\$667
person	Minimum	\$00	\$00	\$00	\$00	\$00	\$00	\$00	\$00	\$00	\$444.89	\$00	\$00
converted to \$	Maximum	\$5,816.93	\$1,906.67	\$5,816.93	\$5,561.12	\$1,557.11	\$1,668.34	\$5,561.12	\$1,557.11	\$2,669.34	\$2,669.34	\$1,334.67	\$1,445.89

On-Island Expenditures Tracking



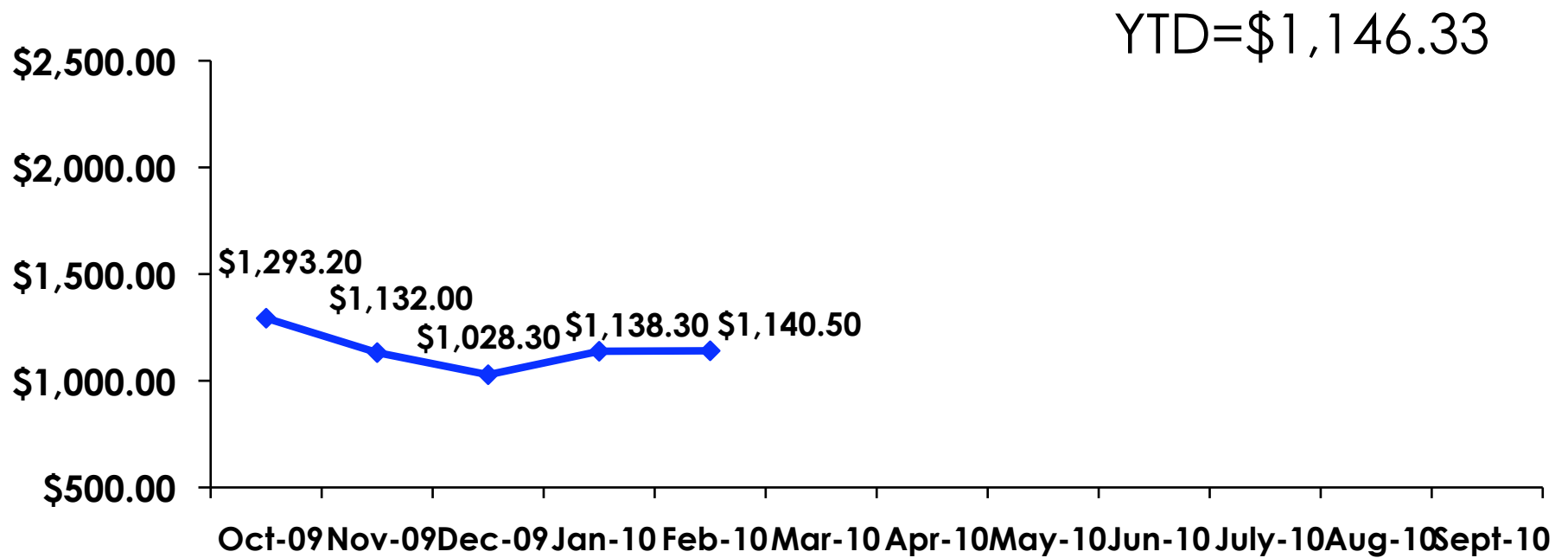
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$520.80	\$448.91	\$612.38	\$556.07	\$636.53	\$371.79	\$375.84	\$484.59	\$463.84	\$652.94	\$569.22	\$495.78
	Median	\$346	\$262	\$400	\$400	\$400	\$288	\$300	\$350	\$350	\$500	\$405	\$400
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$87.50	\$0.00	\$0.00	\$70.00	\$0.00	\$0.00	\$70.00	\$0.00
	Maximum	\$4,740.00	\$3,000.00	\$4,740.00	\$4,000.00	\$3,225.00	\$1,020.00	\$4,000.00	\$1,800.00	\$1,250.00	\$2,700.00	\$2,000.00	\$2,500.00

On-Island Expenditures Breakdown Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$47.61	\$96.76	\$78.25	\$49.41	\$20.28	\$4.07	\$10.41	\$43.00	\$40.00	\$76.07	\$7.56	\$71.87
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$27.50	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$28.55	\$38.22	\$35.30	\$29.78	\$13.15	\$23.36	\$30.40	\$15.63	\$46.58	\$36.71	\$16.16	\$12.57
	Median	\$10.00	\$10.00	\$10.00	\$14.00	\$10.00	\$9.00	\$10.00	\$0.00	\$10.00	\$14.50	\$5.00	\$0.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$81.38	\$112.48	\$101.30	\$80.57	\$78.22	\$30.36	\$44.10	\$84.38	\$83.16	\$98.21	\$43.63	\$125.35
	Median	\$30.00	\$30.00	\$45.00	\$50.00	\$100.00	\$0.00	\$10.00	\$5.00	\$0.00	\$40.00	\$10.00	\$30.00
OPTIONAL TOUR	Mean	\$98.92	\$116.01	\$113.74	\$116.19	\$54.00	\$53.93	\$74.95	\$197.75	\$115.79	\$206.00	\$218.75	\$63.48
	Median	\$0.00	\$0.00	\$0.00	\$40.00	\$0.00	\$0.00	\$0.00	\$45.00	\$0.00	\$0.00	\$100.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$239.61	\$319.85	\$364.60	\$277.94	\$316.39	\$157.86	\$106.62	\$195.00	\$256.32	\$463.57	\$203.75	\$105.78
	Median	\$50.00	\$100.00	\$100.00	\$50.00	\$100.00	\$30.00	\$30.00	\$20.00	\$20.00	\$75.00	\$20.00	\$0.00
GIFT/ SOUV- F&F AT HOME	Mean	\$125.27	\$167.22	\$184.07	\$134.29	\$173.33	\$75.71	\$69.43	\$132.50	\$152.11	\$296.43	\$80.63	\$273.04
	Median	\$50.00	\$50.00	\$85.00	\$70.00	\$80.00	\$10.00	\$40.00	\$30.00	\$50.00	\$175.00	\$25.00	\$100.00
LOCAL TRANS	Mean	\$16.58	\$21.32	\$23.00	\$15.81	\$8.33	\$20.86	\$10.43	\$7.63	\$19.37	\$2.36	\$9.16	\$15.35
	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	\$234.20	\$342.81	\$256.02	\$213.10	\$49.58	\$171.71	\$120.86	\$169.25	\$142.11	\$152.71	\$310.41	\$451.04
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$39.50	\$0.00	\$29.00	\$0.00	\$0.00	\$70.50	\$11.00

Total Expenditures Tracking



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Total	Mean	\$1,140.47	\$1,072.16	\$1,235.46	\$1,181.07	\$1,189.17	\$738.01	\$878.58	\$1,152.79	\$1,387.85	\$1,811.51	\$1,182.95	\$1,195.47
per	Median	\$923.56	\$1,000.00	\$1,000.00	\$944.89	\$945.45	\$697.44	\$739.18	\$880.85	\$1,422.85	\$1,663.86	\$1,019.88	\$1,167.33
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$20.00	\$0.00	\$539.28	\$0.00	\$922.95	\$450.00	\$180.00
expense	Maximum	\$10,556.93	\$3,722.95	\$10,556.93	\$6,261.12	\$3,722.95	\$1,945.89	\$6,261.12	\$3,357.11	\$2,669.34	\$3,144.89	\$3,112.22	\$3,056.11

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 2009, Jan, Feb 2010, Overall Oct 2009 - Feb 2010						
	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Combined Oct 2009 - Feb 2010
Independent Variables:	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	4		3		3	5
Ease of getting around		2	4	2		4
Safety walking around at night						
Quality of daytime tours		3			4	3
Variety of daytime tours	3			4		
Quality of nighttime tours						
Variety of nighttime tours						
Quality of shopping	1	4		1		2
Variety of shopping			2		2	6
Price of things on Guam						
Quality of hotel accommodations	2	1	1	3	1	1
% of Overall Satisfaction Accounted For	52.1%	46.7%	49.2%	51.1%	41.4%	47.9%
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 Feb 2010 Period. By rank order they are:
 - **Quality of hotel accommodations,**
 - **Variety of shopping,**
 - **Cleanliness of beaches and parks, and**
 - **Quality of daytime tours.**
- With all four factors the overall r^2 is .414 meaning that **41.4% of overall satisfaction is accounted for by these four factors.**

Comparison of Drivers of Per Person On Island Expenditure, Oct, Nov, Dec 2009, Jan, Feb 2010, Overall Oct 2009 - Feb 2010						
	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Combined Oct 2009 - Feb 2010
Independent Variables:	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks				3		2
Ease of getting around						
Safety walking around at night						
Quality of daytime tours				2		
Variety of daytime tours						
Quality of nighttime tours						
Variety of nighttime tours		1				
Quality of shopping			1			1
Variety of shopping				1		
Price of things on Guam						
Quality of hotel accommodations						
% of Overall Satisfaction Accounted For	0.0%	1.5%	2.8%	5.6%	0.0%	0.07%
NOTE: Only significant variables are ranked.						

Drivers of Per Person On Island Expenditure

- **There are no significant drivers of Per Person On Island Expenditure during the February 2010 Period.**