



GUAM VISITORS BUREAU
Japan Visitor Tracker Exit Profile
FY2012 MARKET SEGMENTATION –
FEBRUARY 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

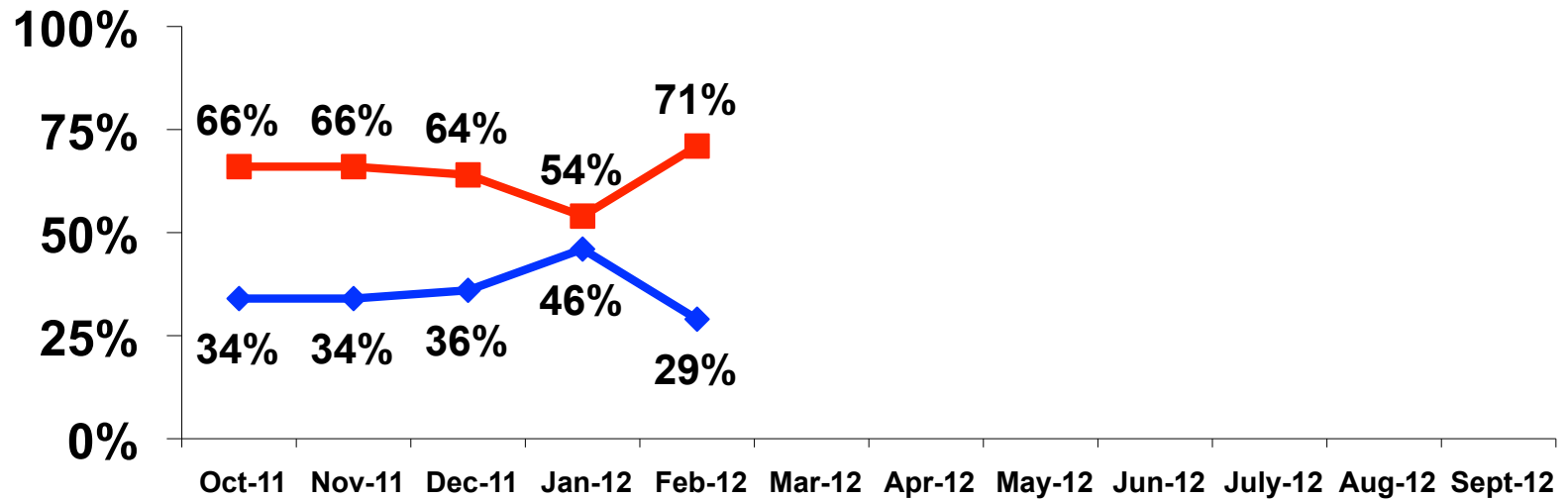
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.18/Q.19/Q.28
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%							
Office Lady	14%	10%	11%	13%	7%							
Group	3%	2%	2%	3%	6%							
Silver	2%	2%	4%	2%	2%							
Wedding	4%	7%	4%	4%	3%							
Sport	67%	69%	58%	68%	68%							
18-35	77%	82%	69%	59%	79%							
36-55	19%	15%	27%	36%	18%							
Child	6%	7%	10%	17%	6%							
Honeymoon	6%	7%	5%	3%	4%							
Repeat	33%	36%	43%	47%	35%							
TOTAL	326	325	327	327	327							

SECTION 1
PROFILE OF RESPONDENTS

Marital Status Tracking

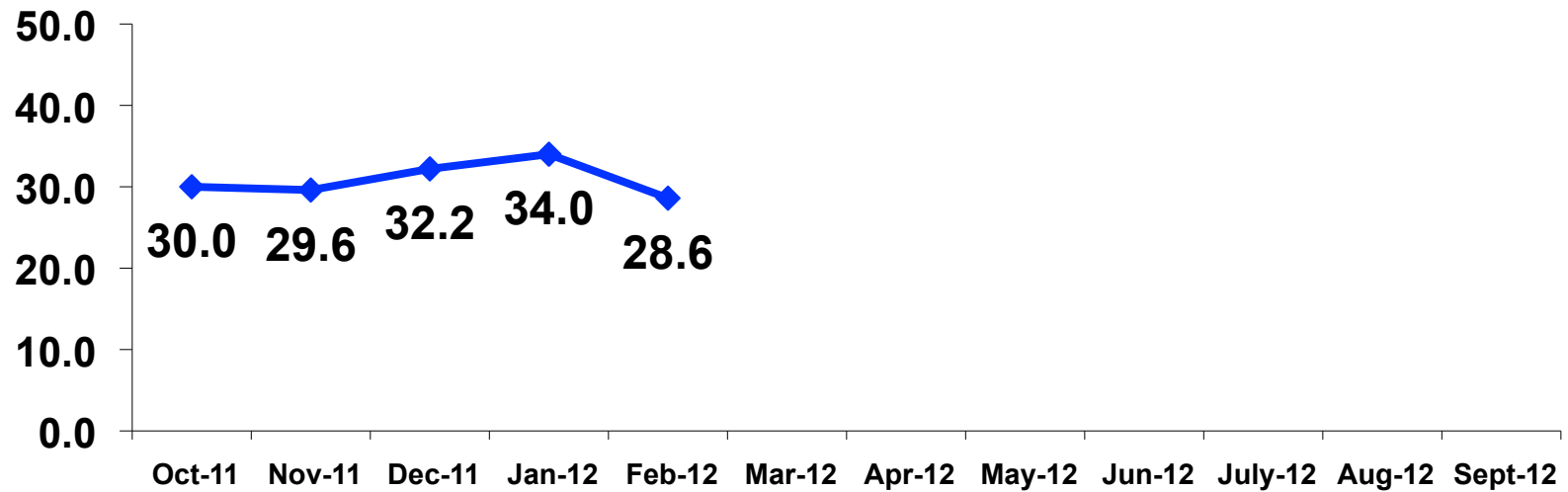


◆ Married ■ Single

Marital Status Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
C.	Married	Count	94	31	3	3	5	6	48	42	43	17	12	51
		Col %	29%	66%	13%	17%	100%	60%	22%	16%	73%	94%	86%	45%
	Single	Count	232	16	20	15		4	174	216	16	1	2	62
		Col %	71%	34%	87%	83%		40%	78%	84%	27%	6%	14%	55%
Total	Count		326	47	23	18	5	10	222	258	59	18	14	113

Average Age Tracking



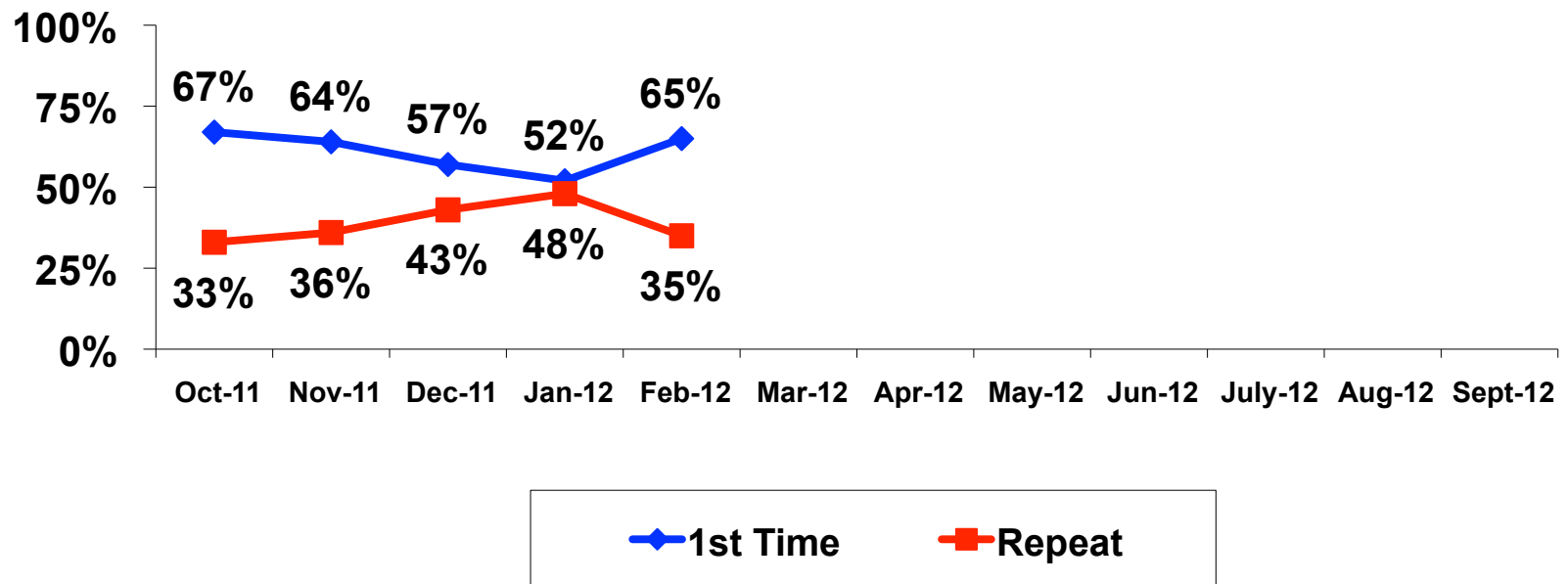
Age Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
D.	18-34	Count	254	17	16	14		7	187	254		4	8	71
		Col %	78%	36%	70%	78%		70%	84%	98%		22%	57%	62%
	35-54	Count	63	28	7	4		3	30	5	58	14	6	38
		Col %	19%	60%	30%	22%		30%	13%	2%	98%	78%	43%	33%
	55+	Count	10	2			5		6		1			5
		Col %	3%	4%			100%		3%		2%			4%
Total	Count		327	47	23	18	5	10	223	259	59	18	14	114
D.	Mean		28.6	38.0	31.2	28.2	63.2	32.8	27.1	24.0	43.8	40.7	31.4	33.2
	Median		24	39	29	22	63	30	22	22	43	41	30	30

Income Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.31	Less than Y2 million	Count Col %	32 12%	2 5%		3 23%		24 13%	31 15%	1 2%			6 6%
	Y2,000,001 - Y3,000,000	Count Col %	35 13%	3 7%	5 24%	1 8%	1 10%	27 15%	29 14%	6 11%	1 7%	3 27%	15 1.5%
	Y3,000,001 - Y4,000,000	Count Col %	24 9%		1 5%	1 8%	1 10%	17 9%	20 10%	4 7%			7 7%
	Y4,000,001 - Y5,000,000	Count Col %	42 16%	7 17%	3 14%	2 15%	1 20%	2 17%	31 17%	5 9%	2 13%	5 45%	15 1.5%
	Y5,000,001 - Y7,000,000	Count Col %	46 17%	10 24%	4 19%	4 31%	3 60%	4 40%	33 18%	13 13%	4 27%	2 18%	14 1.4%
	Y7,000,001 - Y10,000,000	Count Col %	37 14%	5 12%	4 19%	1 8%	1 20%	1 10%	19 11%	25 12%	11 20%	2 13%	20 9%
	Y10,000,001 or more	Count Col %	37 14%	14 33%	4 19%	1 8%		1 10%	22 12%	24 12%	13 24%	5 33%	16 1.6%
	No Income	Count Col %	12 5%	1 2%				7 4%	11 5%	1 2%	1 7%		4 4%
Total	Count		265	42	21	13	5	10	180	202	54	15	97

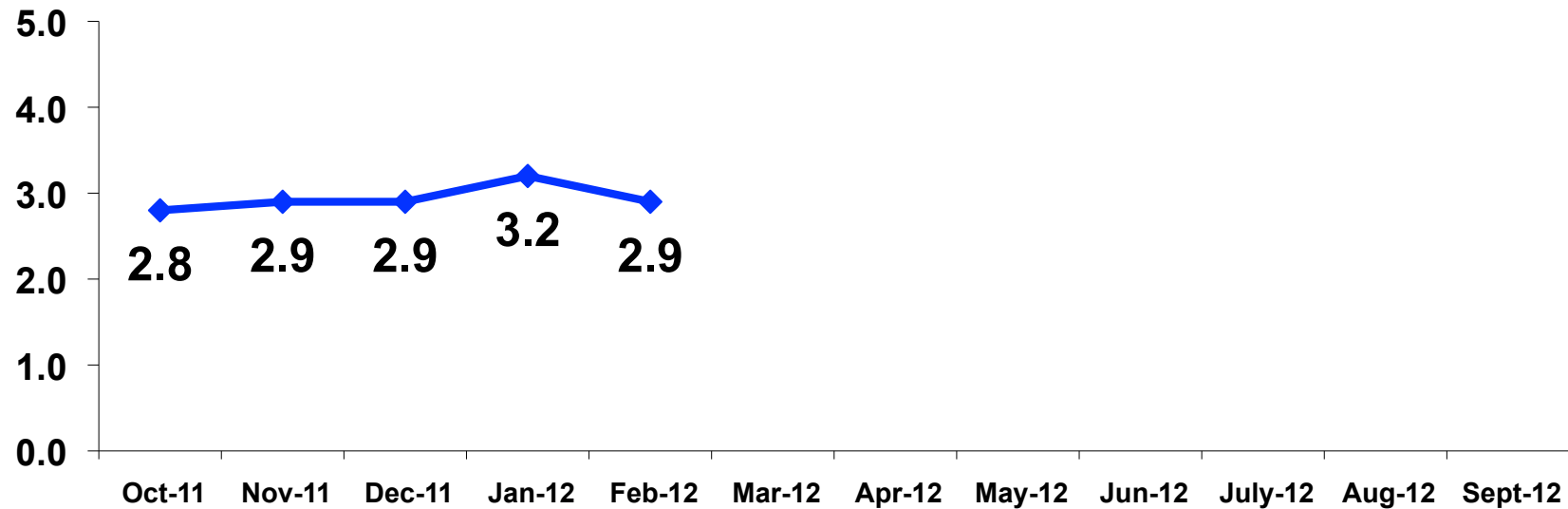
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.3A	Yes	Count	212	20	9	14	1	6	160	184	24	3	11	
		Col %	65%	43%	39%	78%	20%	60%	72%	71%	41%	17%	79%	
	No	Count	114	27	14	4	4	4	62	74	35	15	3	114
		Col %	35%	57%	61%	22%	80%	40%	28%	29%	59%	83%	21%	100%
Total		Count	326	47	23	18	5	10	222	258	59	18	14	114

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	2.9	2.9	2.4	3.6	3.2	2.9	2.9	2.8	3.1	3.6	3.4	2.9
Median	3	3	2	4	3	3	3	3	3	3	3	3
Minimum	1	2	2	1	3	2	1	1	2	2	2	2
Maximum	7	6	3	6	4	4	7	7	7	6	5	7

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	16	5		1	4	55	66	13	5	3	28
		Col %	25%	34%	22%		20%	40%	25%	25%	22%	28%	21%	25%
	Free-time package tours	Count	211	24	18		2	4	145	171	36	10	9	73
		Col %	65%	51%	78%		40%	40%	65%	66%	61%	56%	64%	64%
	Individually arranged travel	Count	9	2			2	1	7	3	4	2		7
		Col %	3%	4%			40%	10%	3%	1%	7%	11%		6%
	Group tour	Count	18	4		18		1	13	14	4	1	2	4
		Col %	6%	9%		100%		10%	6%	5%	7%	6%	14%	4%
	Other	Count	4	1					2	3	1			
		Col %	1%	2%					1%	1%	2%			
	Company paid travel	Count	3						1	2	1			2
		Col %	1%						0%	1%	2%			2%
Total	Count	327	47	23	18	5	10	223	259	59	18	14	114	

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	61%	57%	70%	44%	60%	30%	62%	63%	56%	72%	57%	51%
Pleasure	53%	53%	52%	33%	20%	10%	55%	56%	42%	56%	50%	46%
Short travel time	39%	40%	48%	11%	60%	20%	37%	39%	37%	67%	50%	51%
Shopping	39%	51%	61%	39%	20%	10%	36%	42%	29%	39%	43%	41%
Price of the tour package	40%	30%	52%	28%	40%	10%	44%	43%	27%	22%	29%	33%
Just to relax	32%	30%	35%	11%	40%	30%	32%	30%	37%	33%	21%	40%
A previous visit	24%	47%	39%	11%	60%	20%	17%	21%	37%	72%	21%	59%
Water sports	23%	13%	17%	17%			34%	26%	12%	6%	14%	16%
Recommendation of friend, relative, travel agency	22%	9%	26%	22%	20%		24%	24%	14%	6%		14%
It is a safe place to spend a vacation	13%	15%	17%	11%	40%	10%	11%	12%	14%	22%	7%	17%
Other	6%	2%		17%			7%	7%	3%	11%	7%	3%
SCUBA diving	5%	6%	13%	11%			7%	4%	7%	6%	7%	5%
Honeymoon	4%	2%		11%		10%	4%	4%	7%		100%	3%
To get married or Attend wedding	3%	6%		6%		100%	3%	3%	5%		7%	4%
Company or Business trip	3%			17%			3%	3%	2%			4%
To golf	2%		4%		20%		3%	1%	5%			4%
Organized Sporting Activity	2%						2%	1%	2%		7%	1%
To visit friends or relatives	1%	2%				20%	1%	1%	2%			2%
Special promotion	1%	2%				10%	1%	1%				2%
Promotional materials from GVB	1%					10%	0%	1%				2%
Convention, Conference, Trade show	0%						0%	0%				
My company sponsored me	0%								2%			
Total Cases	327	47	23	18	5	10	223	259	59	18	14	114

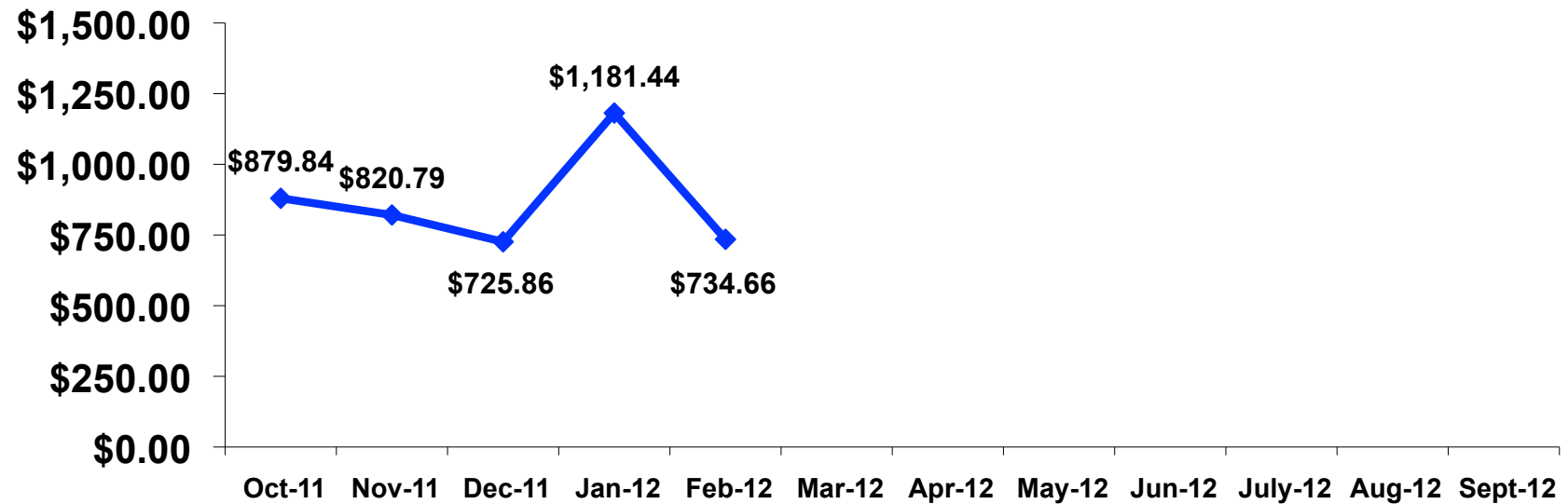
Information Sources Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.1 Internet	67%	61%	82%	44%	80%	70%	69%	66%	65%	57%	69%	72%
Travel guide book at bookstores	60%	61%	73%	56%	40%	40%	62%	62%	50%	57%	54%	52%
Travel agent brochure	54%	57%	50%	33%	20%	50%	56%	58%	39%	64%	54%	52%
I have been to Guam before	26%	48%	50%	17%	40%	20%	21%	22%	46%	93%	23%	76%
Friend or relative	25%	14%	23%	22%		20%	29%	29%	11%	29%	15%	16%
Magazine	20%	23%	18%	17%	20%	30%	23%	19%	22%	7%	23%	17%
TV	11%	9%		17%			11%	11%	9%	14%		9%
Company travel department	3%	2%		6%		10%	3%	4%	4%		8%	1%
Newspaper	3%	7%	9%	6%	20%		3%	2%	2%			2%
GVB office	1%						0%	1%				
GVB promotional activities	0%						0%	0%				
Total Cases	318	44	22	18	5	10	216	255	54	14	13	109

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

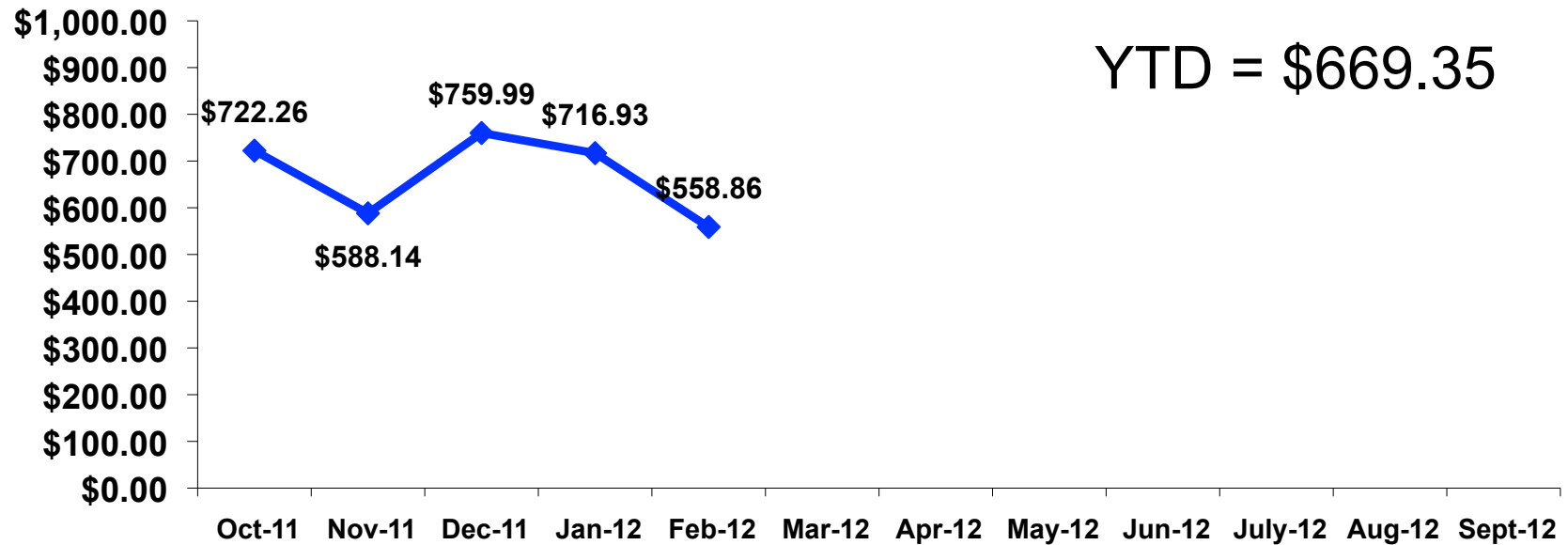
YTD=\$868.57



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Prepaid per person converted to \$	Mean	\$734.66	\$715.48	\$750.01	\$745.60	\$596.47	\$664.42	\$739.51	\$711.28	\$807.07	\$855.98	\$1,195.97	\$719.24
	Median	\$749	\$778	\$778	\$739	\$778	\$746	\$748	\$700	\$778	\$886	\$940	\$778
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Maximum	\$3,565.87	\$1,426.35	\$1,685.68	\$1,296.68	\$946.58	\$1,068.46	\$3,565.87	\$1,815.35	\$3,565.87	\$1,426.35	\$3,565.87	\$1,685.68

On-Island Expenditures Tracking



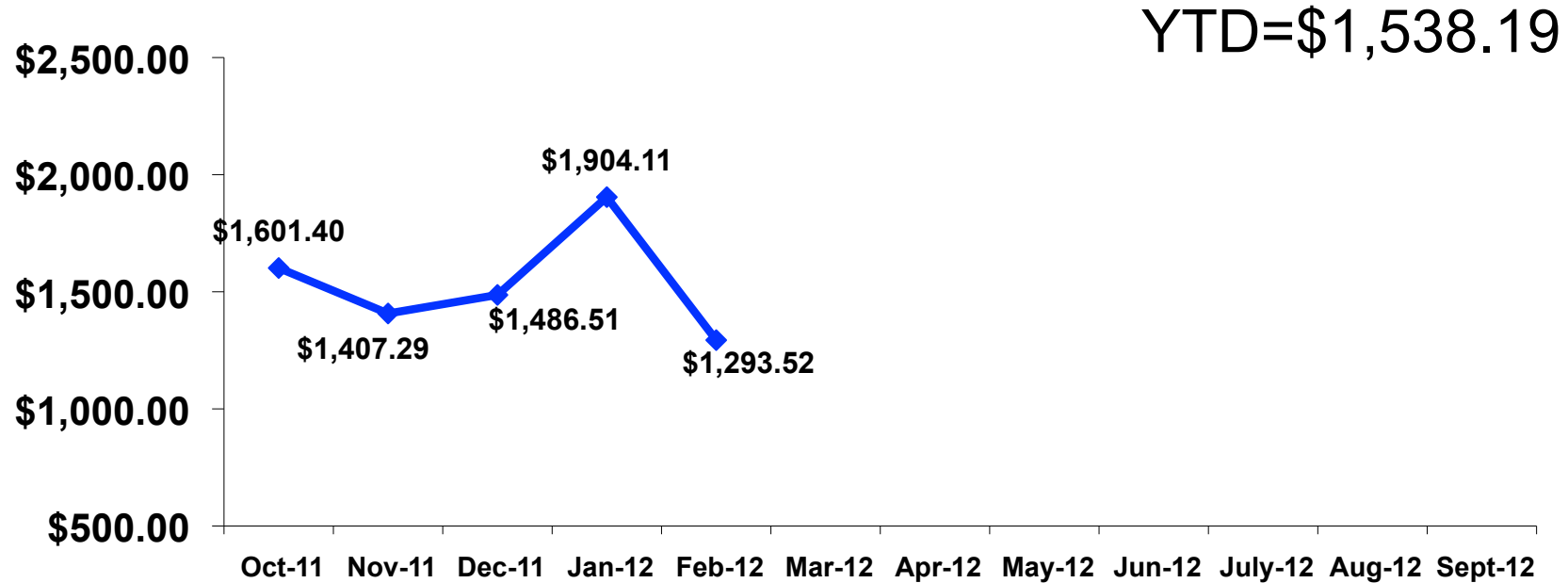
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Per person on-island exp	Mean	\$558.86	\$562.82	\$850.91	\$603.91	\$412.00	\$722.50	\$563.98	\$542.15	\$641.81	\$364.44	\$711.61	\$643.96
	Median	\$400	\$400	\$559	\$500	\$450	\$500	\$410	\$400	\$500	\$260	\$586	\$450
	Minimum	\$0.00	\$0.00	\$65.00	\$250.00	\$150.00	\$150.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Maximum	\$5,000.00	\$5,000.00	\$3,065.00	\$2,363.00	\$560.00	\$1,600.00	\$5,000.00	\$5,000.00	\$2,500.00	\$1,300.00	\$2,500.00	\$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	\$25.56	\$81.21	\$18.70	\$22.78	\$88.00	\$24.60	\$17.38	\$10.85	\$74.63	\$155.67	\$29.29	\$42.09
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$40.00	\$10.00	\$0.00	\$0.00	\$0.00	\$26.00	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$34.25	\$52.38	\$20.22	\$24.17	\$84.00	\$33.50	\$33.30	\$28.20	\$57.92	\$67.22	\$67.64	\$37.28
	Median	\$12.00	\$15.00	\$10.00	\$0.00	\$50.00	\$7.50	\$13.00	\$10.00	\$30.00	\$50.00	\$23.50	\$20.00
F&B-OUT- SIDE HOTEL/REST	Mean	\$64.04	\$95.85	\$55.39	\$36.67	\$172.00	\$95.80	\$59.15	\$51.47	\$113.90	\$115.83	\$69.64	\$76.32
	Median	\$25.00	\$60.00	\$60.00	\$0.00	\$100.00	\$45.00	\$27.00	\$10.00	\$60.00	\$70.00	\$0.00	\$50.00
OPTIONAL TOUR	Mean	\$80.04	\$117.96	\$49.87	\$83.83	\$110.00	\$30.00	\$89.10	\$63.29	\$138.29	\$198.22	\$167.14	\$77.72
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00	\$0.00	\$0.00	\$115.00	\$0.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$246.40	\$428.83	\$355.57	\$242.78	\$220.00	\$62.40	\$220.12	\$195.49	\$480.85	\$335.56	\$346.43	\$335.25
	Median	\$50.00	\$100.00	\$150.00	\$0.00	\$100.00	\$22.00	\$50.00	\$50.00	\$100.00	\$100.00	\$50.00	\$100.00
GIFT/SOUV- F&F AT HOME	Mean	\$132.57	\$232.77	\$200.00	\$91.67	\$168.00	\$115.00	\$124.32	\$102.51	\$241.32	\$194.56	\$292.86	\$171.27
	Median	\$50.00	\$100.00	\$100.00	\$0.00	\$140.00	\$75.00	\$50.00	\$40.00	\$100.00	\$100.00	\$100.00	\$70.00
LOCAL TRANS	Mean	\$9.72	\$15.53	\$7.65	\$5.50	\$64.00	\$3.00	\$9.27	\$8.44	\$11.41	\$13.89	\$19.36	\$11.50
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$40.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$211.70	\$231.19	\$222.43	\$294.67	\$142.00	\$991.00	\$169.30	\$206.45	\$254.68	\$247.39	\$419.43	\$259.66
	Median	\$0.00	\$0.00	\$0.00	\$222.00	\$0.00	\$595.00	\$0.00	\$0.00	\$0.00	\$0.00	\$105.00	\$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	\$1,293.52	\$1,278.30	\$1,600.92	\$1,349.50	\$1,008.47	\$1,386.92	\$1,303.49	\$1,253.43	\$1,448.88	\$1,220.42	\$1,907.58	\$1,363.20
per	Median	\$1,158.01	\$1,177.68	\$1,421.23	\$1,174.27	\$1,096.58	\$1,463.17	\$1,168.82	\$1,138.01	\$1,296.68	\$1,195.43	\$1,731.01	\$1,176.64
person	Minimum	\$.00	\$.00	\$100.00	\$868.67	\$500.00	\$250.00	\$.00	\$.00	\$100.00	\$578.65	\$.00	\$10.00
expense	Maximum	\$6,065.87	\$5,000.00	\$4,116.61	\$3,276.38	\$1,338.01	\$2,572.51	\$6,065.87	\$5,000.00	\$6,065.87	\$2,726.35	\$6,065.87	\$5,000.00

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 2012 and Overall Oct 2011 - Feb 2012						
	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Combined Oct 2011 - Feb 2012
Independent Variables:	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	2	2	1	1	2
Ease of getting around	6		6			6
Safety walking around at night						
Quality of daytime tours			5		4	
Variety of daytime tours	2					5
Quality of nighttime tours						
Variety of nighttime tours						7
Quality of shopping	4	1	7		2	1
Variety of shopping			1	2		
Price of things on Guam	1	4	4			4
Quality of hotel accommodations	5	3	3	3	3	3
% of Overall Satisfaction Accounted For	49.9%	46.6%	50.2%	43.1%	43.9%	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 February 2012 Period. By rank order they are:
 - **Cleanliness of beaches and parks,**
 - **Quality of shopping**
 - **Quality of hotel accommodations, and**
 - **Quality of daytime tours.**
- With all four factors the overall r^2 is .439 meaning that **43.9% 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 2012 and Overall Oct 2011 - Feb 2012

	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Combined Oct 2011 - Feb 2012
Independent Variables:	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks						
Ease of getting around						
Safety walking around at night						
Quality of daytime tours						3
Variety of daytime tours				3		
Quality of nighttime tours						
Variety of nighttime tours		2				
Quality of shopping	1	1	1	2		1
Variety of shopping						4
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%	3.8%

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 February 2012 Period.