



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

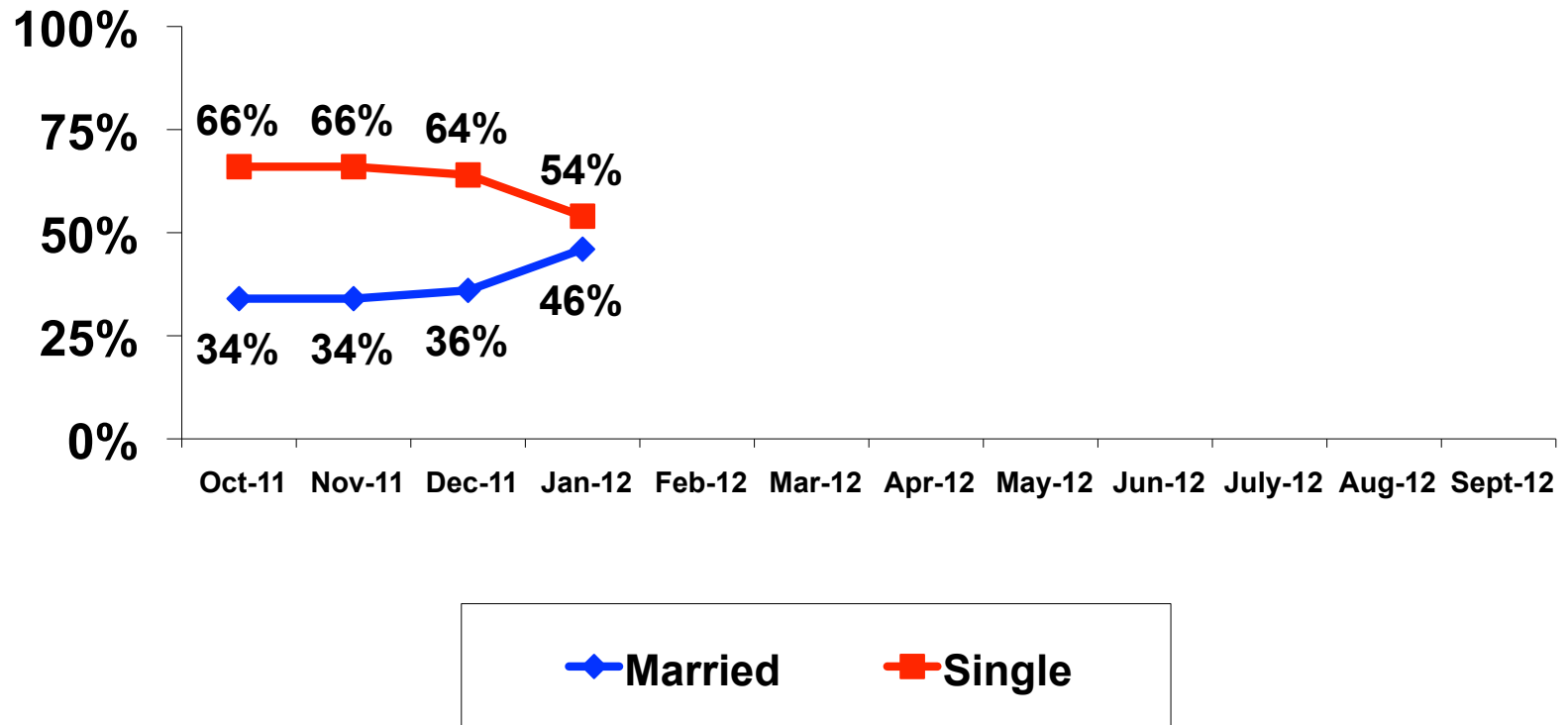
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.18/Q.19/Q.28
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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

SECTION 1
PROFILE OF RESPONDENTS

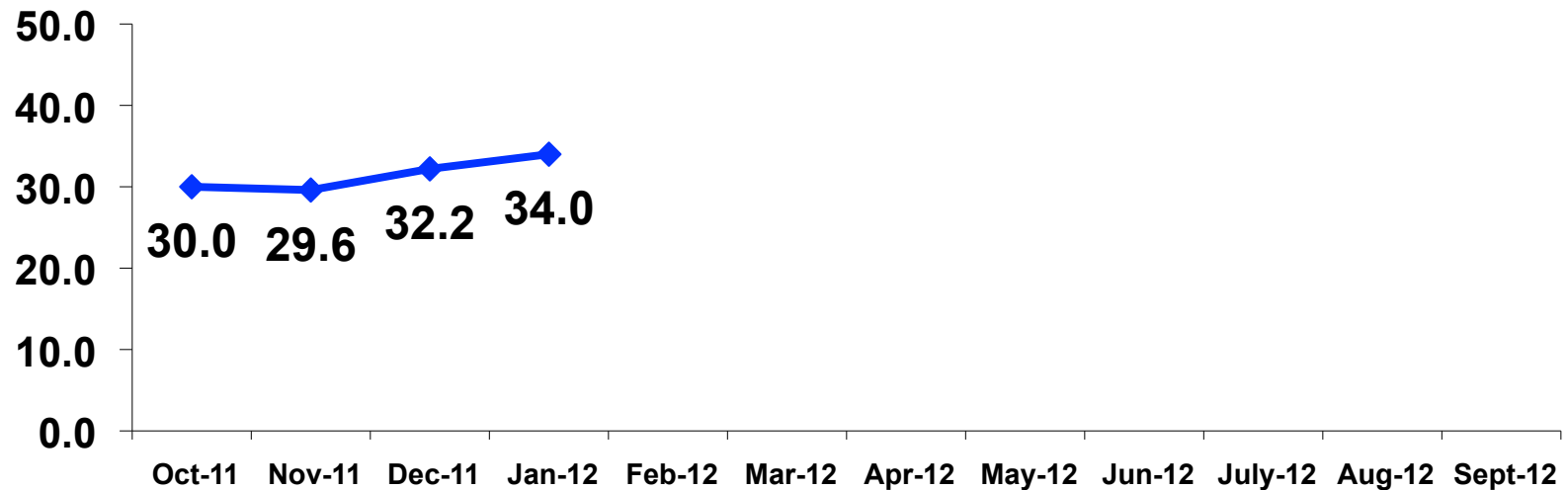
Marital Status Tracking



Marital Status Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
C.	Married	Count	151	80	9	6	8	10	93	39	97	53	10	87
		Col %	46%	78%	21%	55%	100%	77%	42%	20%	82%	98%	91%	56%
	Single	Count	176	23	33	5		3	129	154	22	1	1	68
		Col %	54%	22%	79%	45%		23%	58%	80%	18%	2%	9%	44%
Total	Count		327	103	42	11	8	13	222	193	119	54	11	155

Average Age Tracking



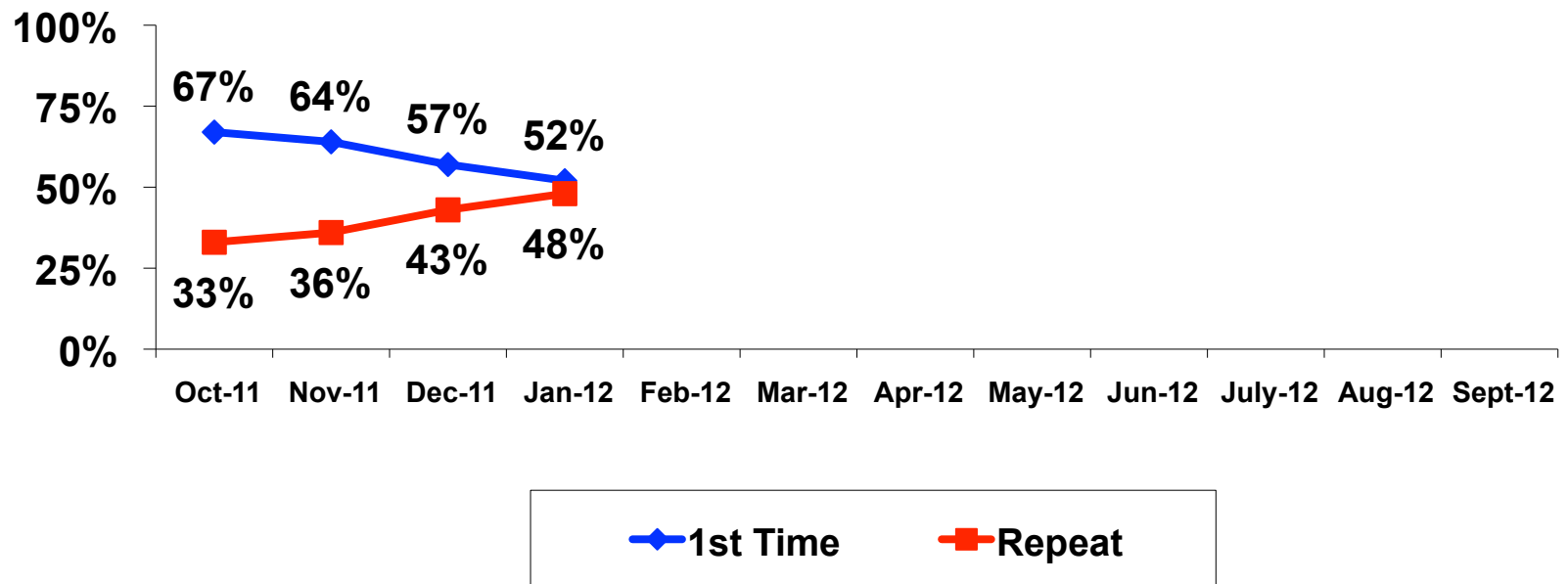
Age Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
D.	18-34	Count	187	29	31	5		10	141	187		5	10	60
		Col %	57%	28%	74%	45%		77%	64%	97%		9%	91%	39%
	35-54	Count	124	62	10	6		2	73	6	118	47	1	83
		Col %	38%	60%	24%	55%		15%	33%	3%	99%	87%	9%	54%
	55+	Count	16	12	1		8	1	8		1	2		12
		Col %	5%	12%	2%		100%	8%	4%		1%	4%		8%
Total	Count		327	103	42	11	8	13	222	193	119	54	11	155
D.	Mean		34.0	40.2	31.0	33.3	62.4	33.6	32.5	26.4	42.9	42.1	29.9	37.8
	Median		31	40	28	35	61	28	29	26	42	41	29	38

Income Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.31	Less than Y2	Count	15	3	2	1			11	14	1			8
	million	Col %	5%	3%	5%	10%			6%	8%	1%			6%
	Y2,000,001 -	Count	26	4	7	3		1	20	20	6	2	2	7
	Y3,000,000	Col %	9%	4%	18%	30%		10%	10%	12%	6%	4%	18%	5%
	Y3,000,001 -	Count	39	7	8	1	1	1	30	31	7	2	4	17
	Y4,000,000	Col %	14%	8%	21%	10%	20%	10%	15%	18%	7%	4%	36%	12%
	Y4,000,001 -	Count	42	9	5	1		1	31	31	9	4	4	15
	Y5,000,000	Col %	15%	10%	13%	10%		10%	16%	18%	8%	8%	36%	11%
	Y5,000,00 -	Count	43	15	6	1	1	2	25	17	24	9		24
	Y7,000,000	Col %	15%	17%	15%	10%	20%	20%	13%	10%	22%	19%		17%
	Y7,000,001 -	Count	45	17	2	1	1	3	32	19	24	11	1	24
	Y10,000,000	Col %	16%	19%	5%	10%	20%	30%	16%	11%	22%	23%	9%	17%
	Y10,000,001	Count	72	34	9	2	2	2	47	33	36	20		43
	or more	Col %	25%	38%	23%	20%	40%	20%	24%	20%	34%	42%		31%
	No Income	Count	4	1					3	4				
		Col %	1%	1%					2%	2%				
Total	Count		286	90	39	10	5	10	199	169	107	48	11	138

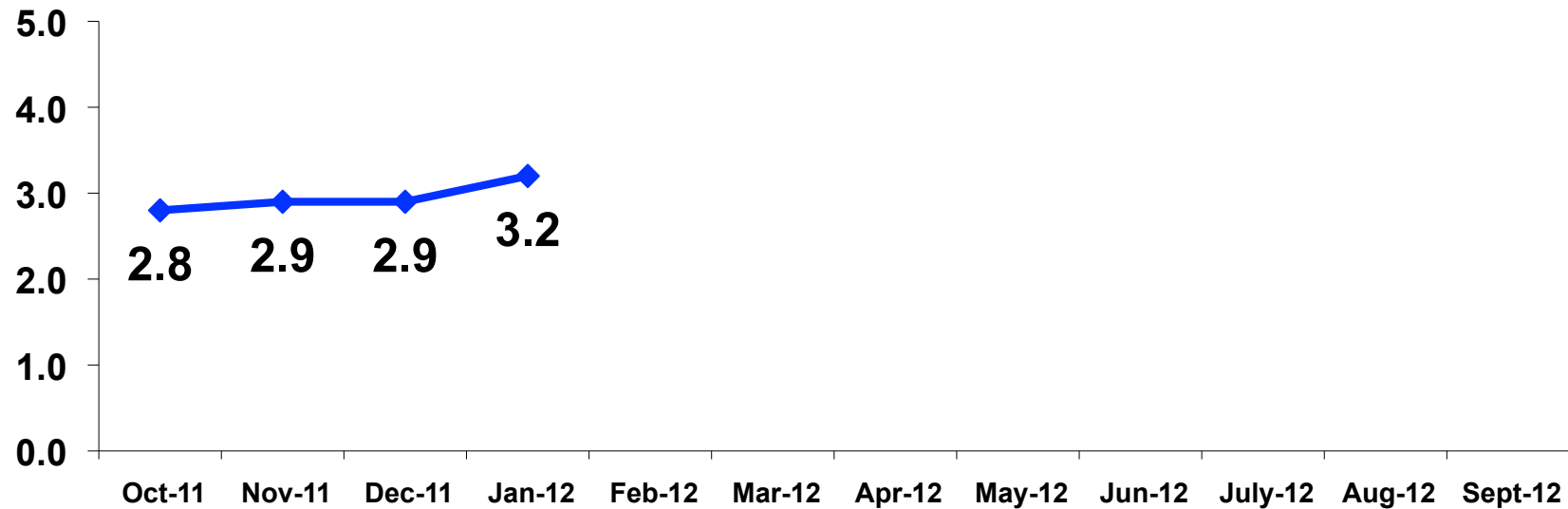
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.3A	Yes	Count	170	36	22	6		11	119	131	36	17	8	
		Col %	52%	35%	54%	55%		85%	54%	68%	31%	31%	73%	
	No	Count	155	67	19	5	8	2	101	61	82	37	3	155
		Col %	48%	65%	46%	45%	100%	15%	46%	32%	69%	69%	27%	100%
Total		Count	325	103	41	11	8	13	220	192	118	54	11	155

Average Length of Stay Tracking



Average Length of Stay Tracking

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.8 Mean	3.2	3.5	2.9	2.6	2.9	3.1	3.2	3.0	3.4	3.4	3.6	3.2
Median	3	3	3	3	3	3	3	3	3	3	4	3
Minimum	1	2	2	2	2	3	2	2	1	2	2	1
Maximum	15	15	4	3	4	4	8	6	15	7	6	15

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	60	24	8		1	41	32	25	15	1	24
		Col %	18%	23%	19%		8%	18%	17%	21%	28%	9%	15%
	Free-time package tours	Count	216	56	30	6	11	149	137	70	28	9	98
		Col %	66%	54%	71%	75%	85%	67%	71%	59%	52%	82%	63%
	Individually arranged travel	Count	31	17	3	1		19	12	17	8	1	24
		Col %	9%	17%	7%	13%		9%	6%	14%	15%	9%	15%
	Group tour	Count	11	4	1		11	8	6	5	3		5
		Col %	3%	4%	2%	100%		4%	3%	4%	6%		3%
	Other	Count	4	2		1	1	1	2	1			2
		Col %	1%	2%		13%	8%	0%	1%	1%			1%
	Company paid travel	Count	5					4	4	1			2
		Col %	2%					2%	2%	1%			1%
Total	Count		327	103	42	11	8	222	193	119	54	11	155

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	62%	62%	67%	36%	50%	15%	68%	63%	62%	72%	82%	53%
Pleasure	46%	49%	55%	45%	25%	23%	51%	45%	49%	67%	55%	45%
Short travel time	43%	57%	48%	36%	63%		42%	37%	52%	54%	27%	51%
Shopping	43%	34%	48%	55%	13%	23%	48%	49%	37%	35%	55%	43%
A previous visit	35%	49%	38%	45%	63%	8%	36%	24%	52%	56%	18%	74%
Just to relax	35%	36%	45%	18%	13%		37%	34%	39%	46%	9%	38%
Water sports	21%	17%	29%	9%	13%		31%	24%	18%	20%	27%	23%
Price of the tour package	23%	20%	21%		25%	15%	24%	25%	18%	22%	18%	21%
It is a safe place to spend a vacation	18%	23%	10%	18%	25%		18%	12%	25%	30%	27%	23%
Recommendation of friend, relative, travel agency	19%	13%	19%	18%	13%		18%	23%	11%	9%	9%	14%
SCUBA diving	7%	4%	2%	9%			11%	8%	7%	6%		6%
To golf	5%	6%		9%	13%		7%	3%	8%	2%		8%
Company or Business trip	5%			27%			5%	7%	3%			7%
To get married or Attend wedding	4%	5%	2%			100%	2%	5%	3%	2%		1%
Honeymoon	3%		2%				5%	5%	1%		100%	2%
Other	3%	5%	2%		13%		4%	4%	3%	4%		3%
Organized Sporting Activity	3%	1%	2%	9%			5%	3%	3%			5%
To visit friends or relatives	2%	2%	5%				2%	2%	3%			3%
My company sponsored me	0%								1%			1%
Special promotion	0%						0%	1%				
Total Cases	327	103	42	11	8	13	222	193	119	54	11	155

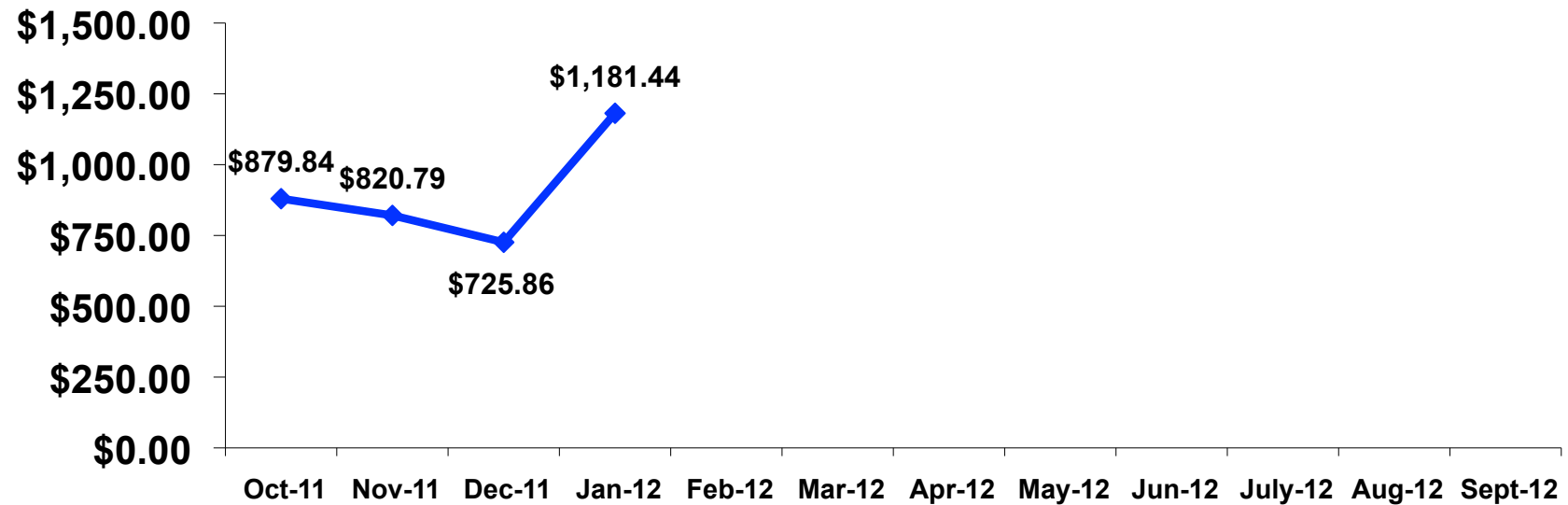
Information Sources Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.1 Internet	66%	69%	57%	36%	57%	77%	65%	62%	71%	79%	27%	56%
Travel guide book at bookstores	63%	58%	71%	55%	14%	85%	62%	68%	57%	71%	73%	57%
I have been to Guam before	42%	58%	43%	45%	100%	8%	42%	27%	63%	62%	27%	39%
Travel agent brochure	37%	42%	33%	27%	29%	38%	38%	37%	37%	42%	27%	33%
Magazine	21%	22%	21%	18%	14%	23%	21%	22%	19%	25%	18%	18%
Friend or relative	18%	15%	19%	18%		15%	18%	23%	14%	15%	45%	9%
TV	8%	7%	2%	9%	29%		9%	8%	5%	10%		6%
Company travel department	3%	1%	7%				4%	5%	2%			3%
Newspaper	2%	2%	2%		14%		2%	2%				2%
Other	1%	2%			14%		1%	2%				2%
GVB office	1%	1%				8%	1%	1%	2%			1%
GVB promotional activities	1%	1%			14%		0%	1%				1%
Total Cases	319	98	42	11	7	13	215	190	115	52	11	151

SECTION 3
EXPENDITURES

Prepaid Expenditures Tracking

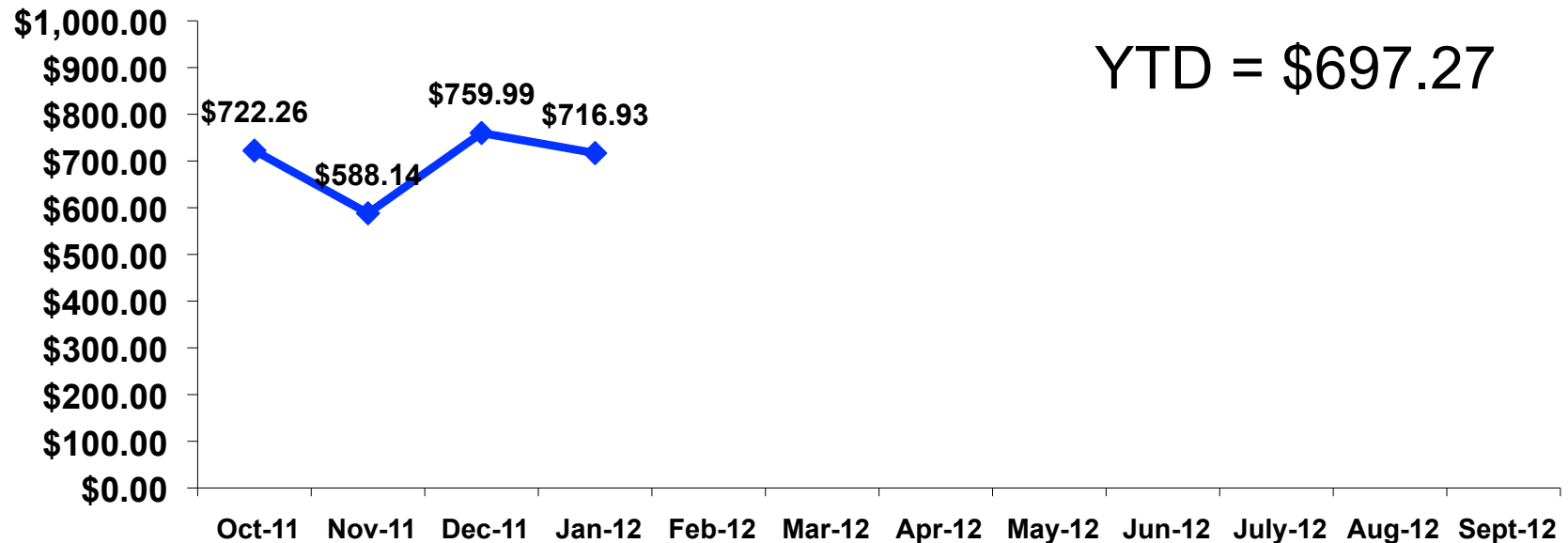
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Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Prepaid	Mean	\$1,181.44	\$1,286.85	\$1,226.14	\$879.09	\$1,369.94	\$886.33	\$1,178.69	\$1,077.15	\$1,338.72	\$1,471.47	\$1,340.89	\$1,216.52
per	Median	\$1,028	\$1,170	\$949	\$468	\$1,300	\$663	\$1,040	\$910	\$1,218	\$1,374	\$1,040	\$1,040
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$519.82	\$0.00
converted to \$	Maximum	\$5,198.18	\$5,198.18	\$5,198.18	\$3,032.27	\$3,205.54	\$1,936.32	\$3,898.64	\$5,198.18	\$3,898.64	\$3,682.04	\$2,599.09	\$5,198.18

On-Island Expenditures Per Person Tracking



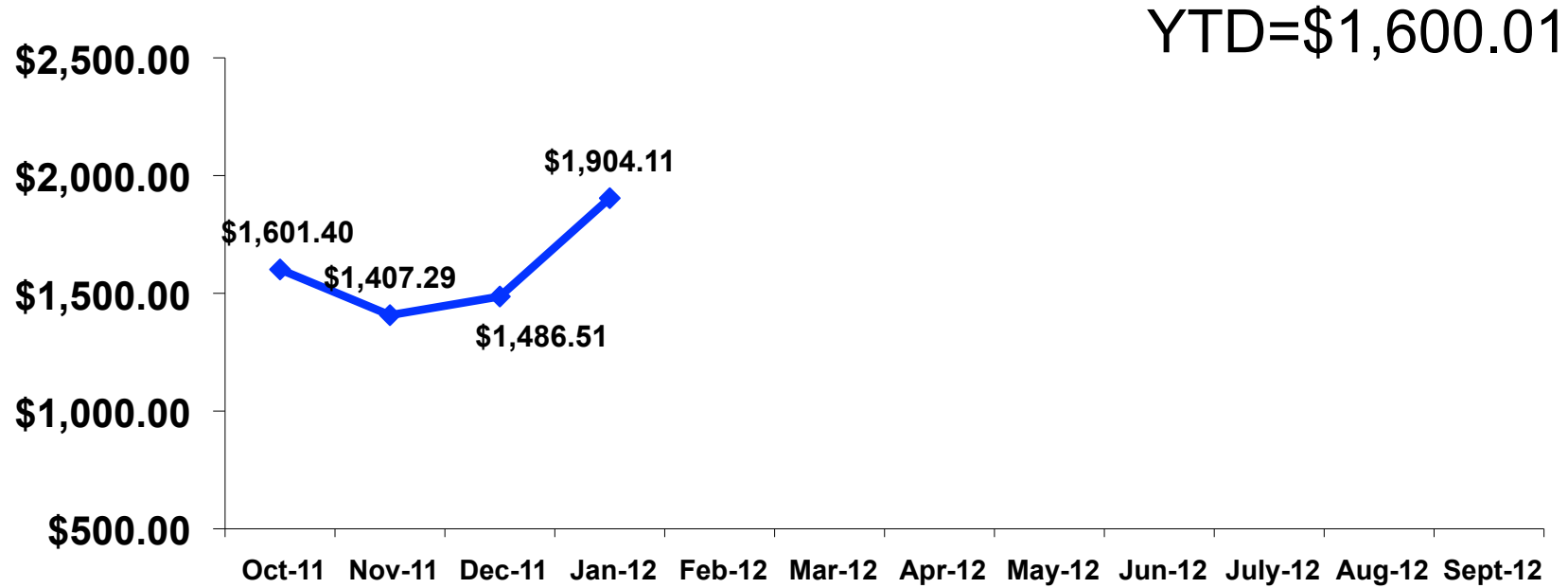
On-Island Expenditures Per Person Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT	
Per Person on-island exp	Mean	\$716.93	\$616.99	\$748.10	\$489.85	\$557.69	\$488.58	\$735.77	\$751.66	\$641.55	\$496.04	\$840.00	\$749.46
	Median	\$510	\$475	\$600	\$375	\$442	\$480	\$550	\$568	\$450	\$345	\$900	\$600
	Minimum	\$0.00	\$0.00	\$200.00	\$200.00	\$0.00	\$52.40	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Maximum	\$5,000.00	\$2,800.00	\$2,000.00	\$1,000.00	\$2,000.00	\$1,250.00	\$5,000.00	\$5,000.00	\$3,500.00	\$2,333.33	\$1,715.00	\$3,000.00

On-Island Expense Breakdown

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
F&B-HOTEL	Mean	\$53.32	\$72.12	\$22.57	\$12.73	\$114.13	\$6.92	\$45.99	\$23.22	\$92.01	\$89.04	\$25.45	\$60.48
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$6.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$47.97	\$71.38	\$26.19	\$31.82	\$17.50	\$54.77	\$50.14	\$35.11	\$66.87	\$93.81	\$58.18	\$51.59
	Median	\$19.00	\$40.00	\$12.50	\$0.00	\$0.00	\$30.00	\$20.00	\$10.00	\$34.00	\$50.00	\$50.00	\$20.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$115.06	\$186.02	\$53.79	\$25.45	\$151.25	\$73.00	\$119.22	\$63.96	\$197.20	\$220.74	\$115.45	\$143.52
	Median	\$47.50	\$50.00	\$22.50	\$0.00	\$0.00	\$19.00	\$50.00	\$25.00	\$100.00	\$155.00	\$150.00	\$40.00
OPTIONAL TOUR	Mean	\$115.13	\$156.39	\$55.17	\$118.18	\$92.50	\$33.08	\$139.21	\$72.83	\$181.66	\$181.30	\$179.09	\$122.69
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$120.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$368.70	\$510.44	\$364.86	\$172.73	\$200.00	\$212.54	\$372.48	\$326.70	\$460.67	\$492.41	\$310.00	\$418.01
	Median	\$100.00	\$200.00	\$275.00	\$50.00	\$0.00	\$143.00	\$100.00	\$100.00	\$150.00	\$200.00	\$60.00	\$100.00
GIFT/SOUV- F&F AT HOME	Mean	\$159.05	\$135.31	\$107.21	\$70.00	\$60.00	\$170.77	\$157.89	\$152.72	\$178.05	\$154.48	\$222.73	\$165.20
	Median	\$80.00	\$50.00	\$76.00	\$0.00	\$0.00	\$80.00	\$80.00	\$80.00	\$76.00	\$100.00	\$100.00	\$50.00
LOCAL TRANS	Mean	\$22.98	\$32.33	\$5.76	\$14.55	\$25.00	\$28.77	\$20.39	\$15.76	\$35.78	\$44.28	\$31.82	\$33.30
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$14.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$306.39	\$418.44	\$300.74	\$405.45	\$412.50	\$173.85	\$294.95	\$249.38	\$258.03	\$360.39	\$610.90	\$357.75
	Median	\$0.00	\$0.00	\$0.00	\$180.00	\$0.00	\$20.00	\$0.00	\$0.00	\$0.00	\$10.00	\$50.00	\$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	\$1,904.11	\$1,916.45	\$1,974.23	\$1,368.94	\$1,927.62	\$1,374.90	\$1,917.49	\$1,829.69	\$1,986.38	\$1,967.51	\$2,180.89	\$1,971.09
per	Median	\$1,743.60	\$1,795.98	\$1,859.13	\$1,000.00	\$1,639.52	\$1,167.79	\$1,769.82	\$1,659.64	\$1,824.43	\$1,827.08	\$2,199.32	\$1,830.86
person	Minimum	\$.00	\$.00	\$225.00	\$300.00	\$311.50	\$354.07	\$.00	\$.00	\$.00	\$.00	\$1,039.64	\$.00
expense	Maximum	\$6,423.98	\$6,198.18	\$6,198.18	\$3,365.61	\$3,805.54	\$2,549.55	\$6,338.53	\$6,338.53	\$6,423.98	\$5,128.71	\$3,399.09	\$6,193.18

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, and Jan 2012 and Overall Oct 2011 - Jan 2012					
	Oct-11	Nov-11	Dec-11	Jan-12	Combined Oct 2011 - Jan 2012
Independent Variables:	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	2	2	1	2
Ease of getting around	6		6		6
Safety walking around at night					
Quality of daytime tours			5		
Variety of daytime tours	2				5
Quality of nighttime tours					7
Variety of nighttime tours					
Quality of shopping	4	1	7		1
Variety of shopping			1	2	8
Price of things on Guam	1	4	4		4
Quality of hotel accommodations	5	3	3	3	3
% of Overall Satisfaction Accounted For	49.9%	46.6%	50.2%	43.1%	46.9%
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 January 2012 Period. By rank order they are:
 - **Cleanliness of beaches and parks,**
 - **Variety of shopping, and**
 - **Quality of hotel accommodations.**
- With all three factors the overall r^2 is .431 meaning that **43.1% of overall satisfaction is accounted for by these three factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2011, and Jan 2012 and Overall Oct 2011 - Jan 2012					
	Oct-11	Nov-11	Dec-11	Jan-12	Combined Oct 2011 - Jan 2012
Independent Variables:	rank	rank	rank	rank	rank
Cleanliness of beaches & parks					
Ease of getting around					
Safety walking around at night					
Quality of daytime tours					
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					3
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%	4.3%

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 three significant factors in the December 2012 Period. They are:
 - **Quality of hotel accommodations,**
 - **Quality of shopping, and**
 - **Variety of daytime tours.**
- With these three factors the r^2 is .048 meaning that **4.8% of Per person on island expenditure is accounted for by these factors.**