



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

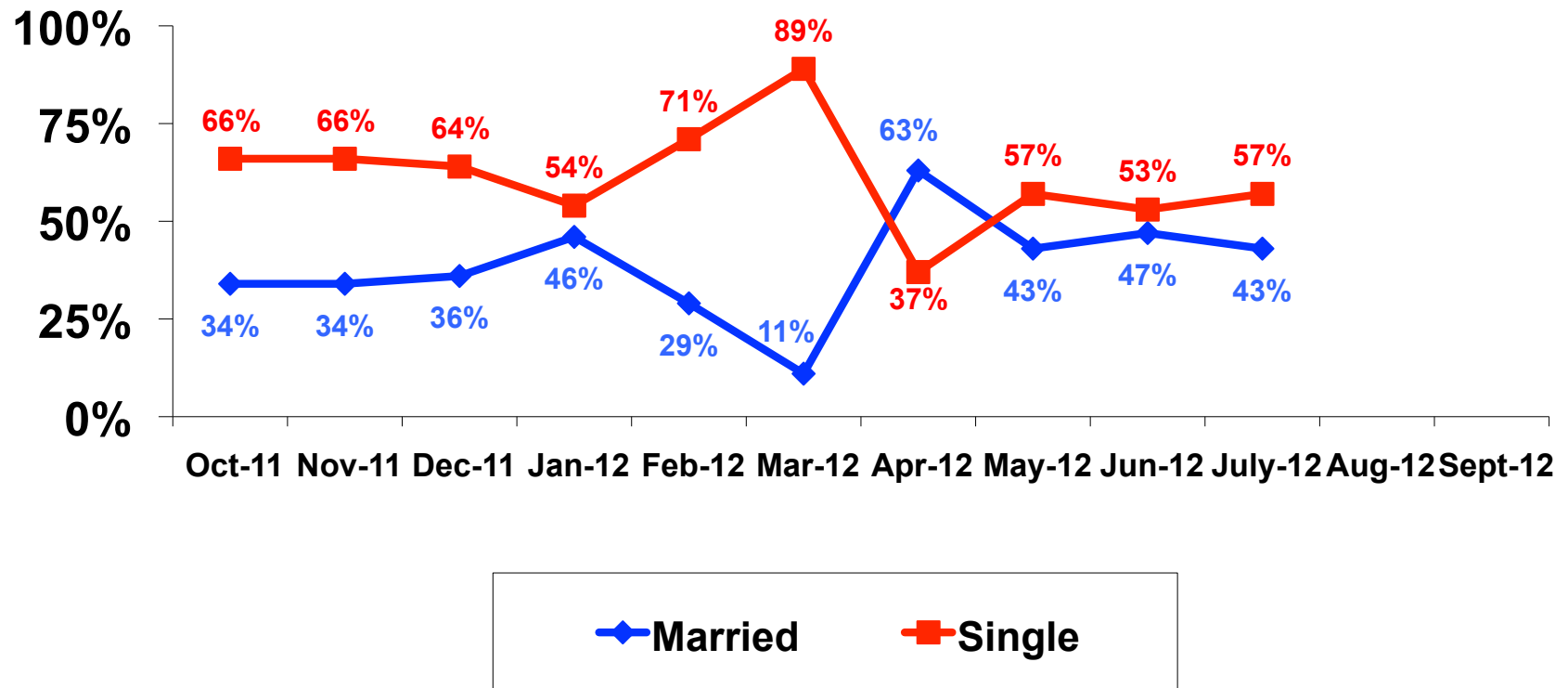
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.18/Q.19/Q.28
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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

SECTION 1 **PROFILE OF RESPONDENTS**

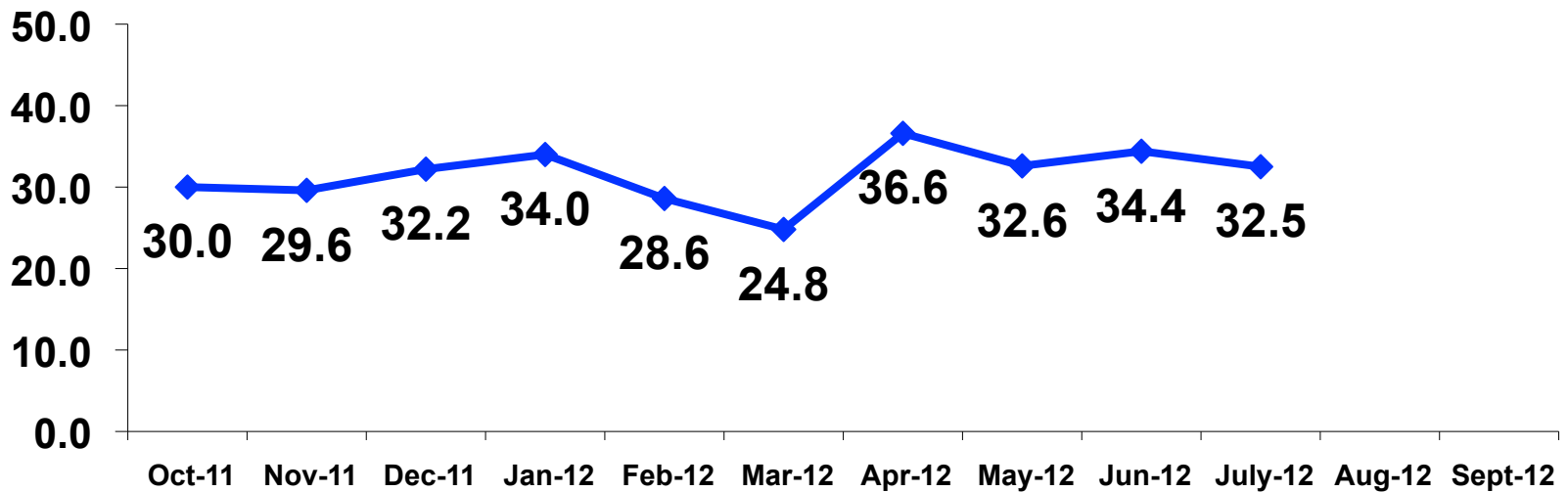
Marital Status Tracking



Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
C. Married	Count	142	52	6	7	11	13	85	61	63	34	9	76
	Col %	43%	80%	16%	54%	100%	59%	40%	27%	75%	100%	100%	55%
Single	Count	185	13	31	6		9	130	164	21			61
	Col %	57%	20%	84%	46%		41%	60%	73%	25%			45%
Total	Count	327	65	37	13	11	22	215	225	84	34	9	137

Average Age Tracking



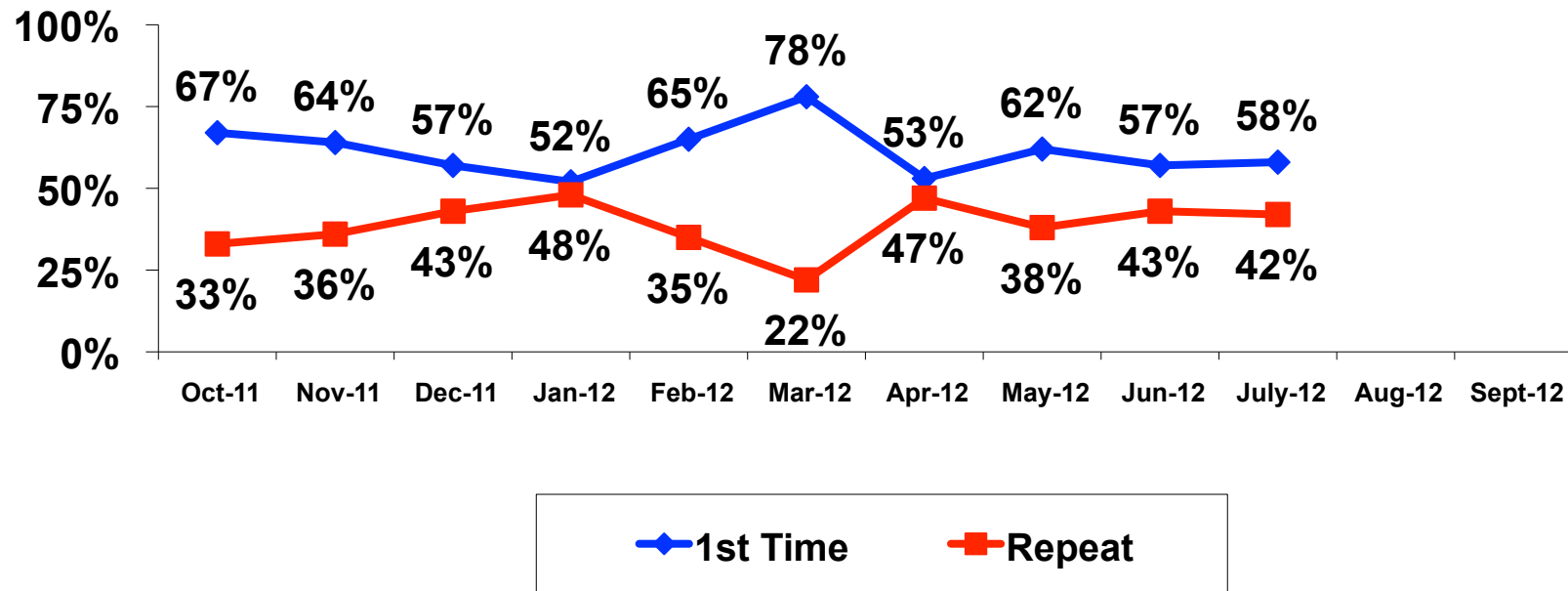
Age Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
D.	18-34	Count	218	30	33	6		15	150	218		12	6	67
		Col %	67%	46%	89%	46%		68%	70%	97%		35%	67%	49%
	35-54	Count	90	28	3	7		2	53	7	83	21	3	59
		Col %	28%	43%	8%	54%		9%	25%	3%	99%	62%	33%	43%
	55+	Count	18	6	1		11	5	11		1			10
		Col %	6%	9%	3%		100%	23%	5%		1%			7%
	17.00	Count	1	1					1			1		1
		Col %	0%	2%					0%			3%		1%
Total	Count		327	65	37	13	11	22	215	225	84	34	9	137
D.	Mean		32.5	37.1	28.6	35.6	63.5	37.9	31.5	26.5	42.8	36.7	32.2	35.9
	Median		29	35	27	36	63	32	27	26	43	37	30	35

Income Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.31 Less than Y2 million	Count 14	1	3			2	11	13	1			6
	Col % 5%	2%	9%			10%	6%	6%	1%			5%
Y2,000,001 - Y3,000,000	Count 31	4	7		1	3	19	27	1	2	3	10
	Col % 11%	7%	20%		13%	14%	10%	13%	1%	6%	33%	8%
Y3,000,001 - Y4,000,000	Count 36	4	4		1	4	26	30	5	1		10
	Col % 12%	7%	11%		13%	19%	13%	15%	6%	3%		8%
Y4,000,001 - Y5,000,000	Count 55	6	4	4	2	6	34	38	14	3	3	23
	Col % 19%	10%	11%	33%	25%	29%	18%	19%	18%	9%	33%	18%
Y5,000,001 - Y7,000,000	Count 67	15	7	2	2	2	48	47	17	8	3	27
	Col % 23%	25%	20%	17%	25%	10%	25%	23%	22%	24%	33%	21%
Y7,000,001 - Y10,000,000	Count 50	14	3	4	1	1	31	23	26	11		27
	Col % 17%	23%	9%	33%	13%	5%	16%	11%	33%	33%		21%
Y10,000,001 or more	Count 35	17	7	1	1	3	20	19	13	8		24
	Col % 12%	28%	20%	8%	13%	14%	10%	9%	17%	24%		19%
No Income	Count 7			1			4	6	1			2
	Col % 2%			8%			2%	3%	1%			2%
Total	Count 295	61	35	12	8	21	193	203	78	33	9	129

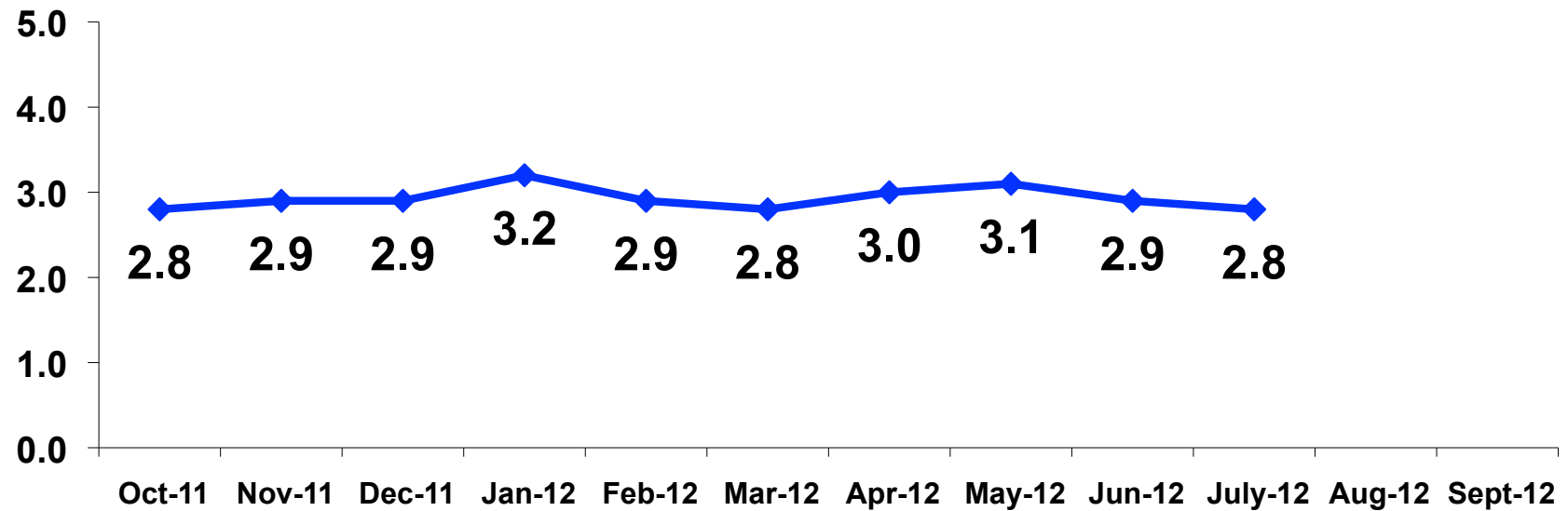
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.3A Yes	Count		190	25	23	4	4	12	136	156	26	11	9	
	Col %		58%	38%	62%	31%	36%	55%	63%	69%	31%	32%	100%	
No	Count		137	40	14	9	7	10	79	69	58	23		137
	Col %		42%	62%	38%	69%	64%	45%	37%	31%	69%	68%		100%
Total	Count		327	65	37	13	11	22	215	225	84	34	9	137

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	2.8	2.9	2.7	2.5	3.4	3.0	2.8	2.8	2.8	2.9	3.2	2.9
Median	3	3	3	2	3	3	3	3	3	3	3	3
Minimum	1	2	1	2	2	2	1	1	2	2	2	2
Maximum	7	7	4	4	5	4	6	7	6	5	4	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	77	17	12		1	9	48	57	17	5	4	23
		Col %	24%	26%	32%		9%	41%	22%	25%	20%	15%	44%	17%
	Free-time package tours	Count	219	43	23		9	12	145	152	53	23	5	93
		Col %	67%	66%	62%		82%	55%	67%	68%	63%	68%	56%	68%
	Individually arranged travel	Count	8	5			1	1	6	5	2	5		5
		Col %	2%	8%			9%	5%	3%	2%	2%	15%		4%
	Group tour	Count	13		1	13			10	6	7	1		9
		Col %	4%		3%	100%			5%	3%	8%	3%		7%
	Other	Count	1						1	1				1
		Col %	0%						0%	0%				1%
	Company paid travel	Count	8		1				5	3	5			6
		Col %	2%		3%				2%	1%	6%			4%
Total	Count		326	65	37	13	11	22	215	224	84	34	9	137

Travel Motivation Segmentation

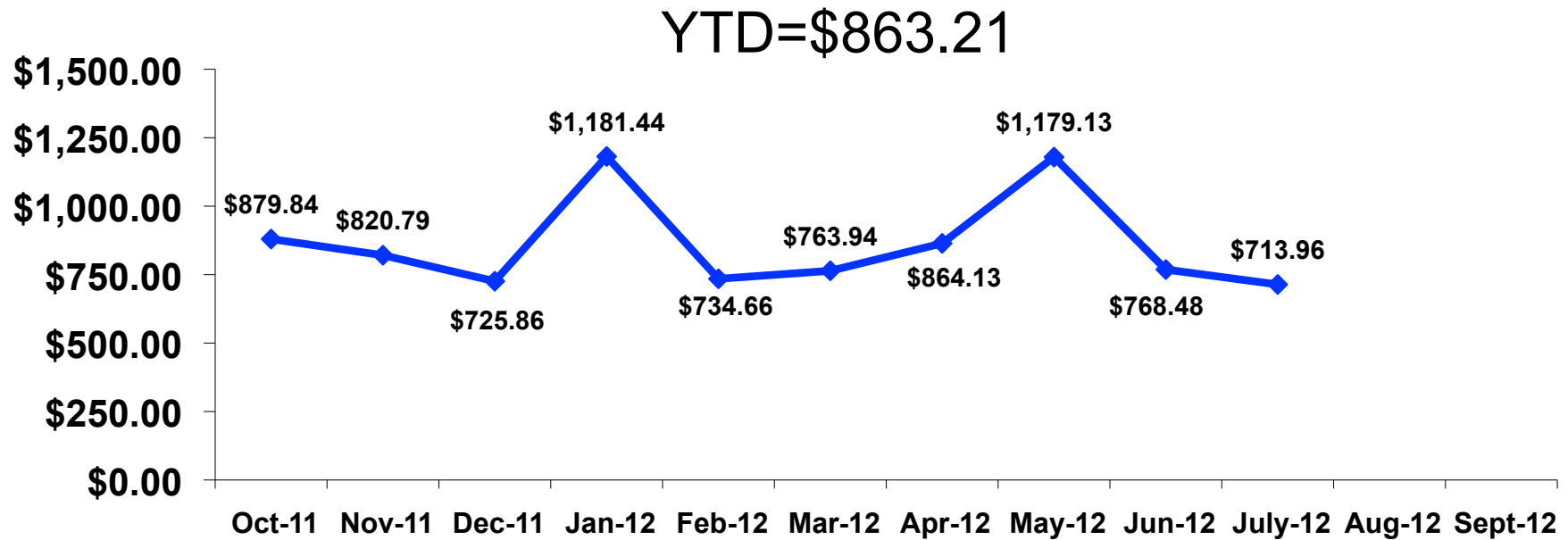
	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.5 Beautiful seas, beaches, tropical climate	54%	42%	65%	15%	27%	5%	59%	57%	49%	50%	56%	47%
Short travel time	44%	49%	46%	15%	36%	9%	47%	41%	51%	62%	56%	46%
Pleasure	43%	35%	54%	15%	9%	5%	47%	48%	35%	44%	11%	36%
A previous visit	29%	51%	19%	38%	36%	32%	25%	20%	52%	53%		59%
Shopping	35%	34%	57%	8%		14%	33%	39%	30%	26%	11%	36%
Just to relax	33%	29%	27%	15%	27%		34%	30%	42%	44%	11%	40%
Price of the tour package	34%	28%	32%	8%	9%		32%	34%	35%	41%	56%	30%
Water sports	21%	14%	24%		18%		32%	23%	17%	9%	22%	17%
Recommendation of friend, relative, travel agency	21%	8%	16%	23%	18%	5%	24%	27%	7%	3%	11%	9%
It is a safe place to spend a vacation	15%	18%	19%		18%	5%	13%	12%	19%	21%	11%	22%
To get married or Attend wedding	7%	20%	3%		27%	100%	4%	7%	2%	6%		7%
SCUBA diving	6%	3%					9%	7%	6%		11%	7%
Company or Business trip	4%		5%	31%			4%	3%	8%			5%
Honeymoon	3%		3%				3%	3%	4%		100%	
My company sponsored me	3%			23%			2%	3%	2%			4%
Other	3%				9%		3%	2%	5%	3%	11%	4%
To golf	2%	3%	3%	8%	9%		3%	1%	5%	3%		4%
Organized Sporting Activity	1%	2%			9%		2%	0%	2%	3%		1%
To visit friends or relatives	1%	3%				5%		0%	1%	3%		1%
Career certification or testing	1%	2%					1%	0%	1%	3%		1%
Special promotion	1%	2%					1%	0%	1%	3%		
Total Cases	327	65	37	13	11	22	215	225	84	34	9	137

Information Sources Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT	
Q.1													
Travel guide book at bookstores	67%	61%	73%	54%	64%	55%	67%	69%	64%	62%	89%	50%	
Internet	61%	56%	70%	54%	18%	50%	64%	67%	54%	74%	44%	50%	
Travel agent brochure	42%	39%	38%	8%	36%	36%	45%	42%	42%	41%	44%	38%	
I have been to Guam before	33%	56%	30%	62%	55%	32%	28%	23%	55%	62%		79%	
Magazine	19%	22%	16%	15%	27%	36%	19%	19%	18%	21%	22%	18%	
Friend or relative	18%	16%	30%		18%	18%	20%	23%	7%	12%	22%	10%	
TV	8%	14%	5%		36%	14%	10%	7%	7%	9%		11%	
Company travel department	6%	2%	8%	8%		5%	6%	6%	5%	3%	11%	4%	
Newspaper	2%	3%			9%		3%	1%	4%	6%		4%	
Other	1%	2%						1%		3%		1%	
GVB promotional activities	0%						0%	0%					
GVB office	0%						0%	0%					
Total	Cases	326	64	37	13	11	22	214	225	83	34	9	136

SECTION 3
EXPENDITURES

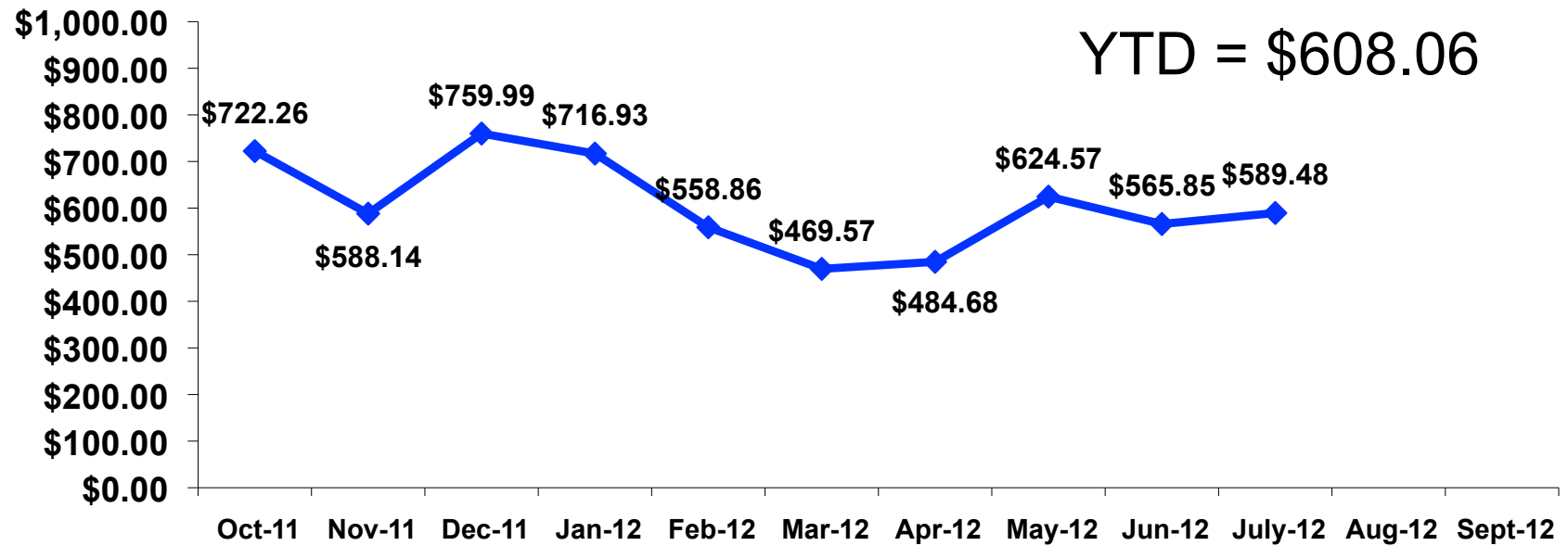
Prepaid Expenditures Tracking



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Prepaid	Mean	\$713.96	\$686.16	\$722.52	\$311.69	\$751.58	\$761.43	\$698.83	\$702.29	\$694.38	\$706.01	\$1,772.98	\$662.63
per	Median	\$691	\$670	\$691	\$0	\$754	\$775	\$658	\$670	\$663	\$665	\$1,319	\$656
person	Minimum	\$00	\$00	\$00	\$00	\$00	\$00	\$00	\$00	\$00	\$00	\$691.04	\$00
converted to \$	Maximum	\$3,141.10	\$2,512.88	\$1,608.24	\$1,005.15	\$1,256.44	\$2,512.88	\$3,141.10	\$3,141.10	\$3,141.10	\$2,512.88	\$3,141.10	\$2,094.07

On-Island Expenditures Tracking



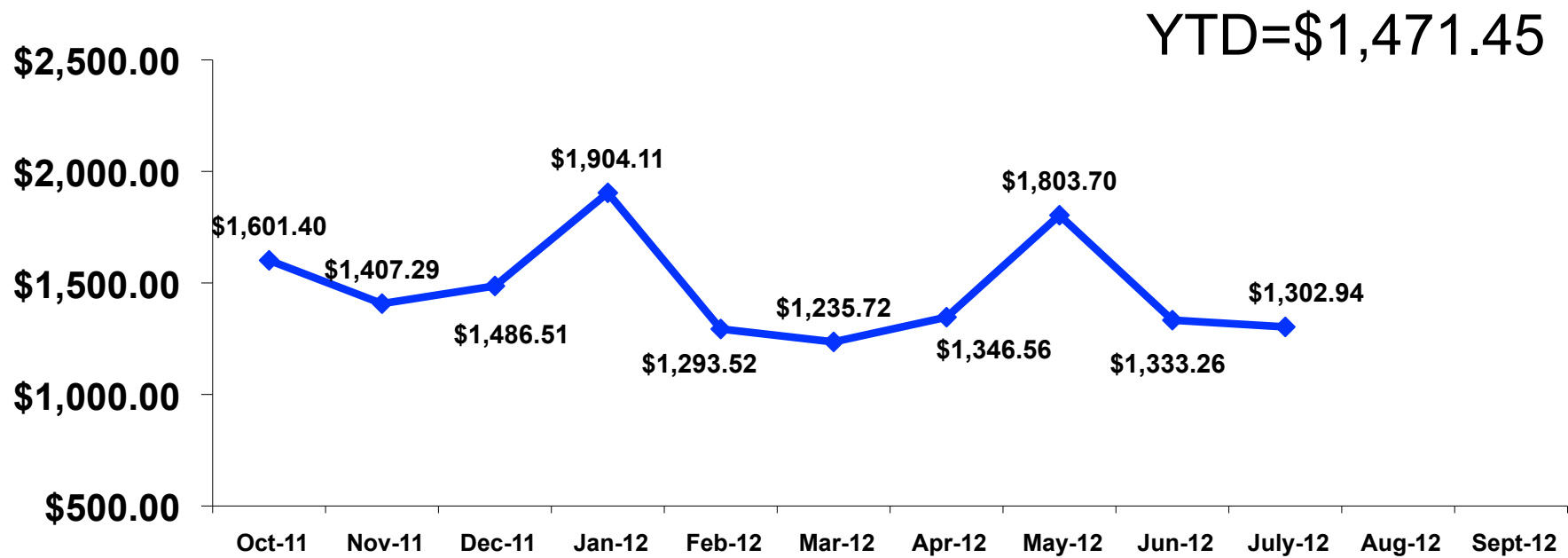
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Per person on-island exp	Mean	\$589.48	\$420.51	\$851.92	\$864.85	\$256.26	\$408.27	\$610.33	\$629.88	\$535.89	\$312.26	\$801.67	\$545.29
	Median	\$400	\$297	\$760	\$600	\$275	\$354	\$400	\$420	\$375	\$221	\$900	\$400
	Minimum	\$0.00	\$0.00	\$0.00	\$80.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$300.00	\$0.00
	Maximum	\$5,300.00	\$1,800.00	\$2,000.00	\$3,500.00	\$523.00	\$1,200.00	\$5,300.00	\$5,300.00	\$3,500.00	\$1,500.00	\$1,765.00	\$3,500.00

On-Island Expense Breakdown

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
F&B-HOTEL	Mean	\$28.07	\$51.31	\$7.24	\$29.23	\$57.91	\$24.14	\$24.54	\$21.17	\$44.75	\$79.39	\$83.67	\$41.76
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$90.00	\$0.00
F&B-FF	Mean	\$25.14	\$24.64	\$16.76	\$19.62	\$47.27	\$24.55	\$22.90	\$21.94	\$31.22	\$28.33	\$33.89	\$29.50
REST/CONV	Median	\$10.00	\$0.00	\$3.00	\$10.00	\$10.00	\$0.00	\$10.00	\$7.00	\$18.00	\$0.00	\$15.00	\$10.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$71.72	\$88.52	\$41.59	\$40.38	\$102.27	\$46.36	\$78.61	\$60.92	\$99.02	\$92.58	\$65.00	\$93.10
	Median	\$30.00	\$0.00	\$20.00	\$5.00	\$7.00	\$0.00	\$50.00	\$20.00	\$50.00	\$50.00	\$80.00	\$50.00
OPTIONAL TOUR	Mean	\$88.87	\$41.72	\$63.86	\$112.31	\$54.36	\$35.68	\$113.48	\$94.07	\$83.46	\$30.30	\$171.11	\$84.01
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$40.00	\$0.00	\$0.00	\$0.00	\$180.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$197.10	\$191.64	\$320.49	\$306.15	\$18.27	\$95.45	\$200.28	\$203.59	\$213.54	\$265.30	\$356.67	\$197.57
	Median	\$30.00	\$50.00	\$50.00	\$30.00	\$0.00	\$0.00	\$40.00	\$30.00	\$100.00	\$100.00	\$200.00	\$50.00
GIFT/SOUV- F&F AT HOME	Mean	\$116.80	\$109.28	\$131.35	\$118.46	\$125.00	\$85.00	\$121.23	\$114.88	\$121.96	\$112.12	\$587.44	\$111.60
	Median	\$50.00	\$50.00	\$30.00	\$0.00	\$50.00	\$0.00	\$72.00	\$50.00	\$70.00	\$80.00	\$500.00	\$50.00
LOCAL TRANS	Mean	\$10.75	\$9.80	\$7.78	\$11.00	\$3.73	\$5.91	\$14.27	\$10.20	\$14.08	\$12.79	\$0.00	\$12.19
	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	\$270.22	\$399.94	\$330.92	\$264.23	\$186.45	\$240.23	\$249.29	\$252.13	\$327.37	\$283.94	\$311.11	\$218.28
	Median	\$4.00	\$4.00	\$20.00	\$100.00	\$0.00	\$2.50	\$4.00	\$10.00	\$0.00	\$0.00	\$85.00	\$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	\$1,302.94	\$1,106.67	\$1,574.44	\$1,176.54	\$1,007.84	\$1,169.70	\$1,308.31	\$1,332.17	\$1,228.03	\$1,018.27	\$2,574.64	\$1,207.92
per	Median	\$1,116.04	\$959.11	\$1,503.86	\$908.00	\$940.91	\$1,124.80	\$1,173.96	\$1,219.04	\$1,028.22	\$898.31	\$2,573.12	\$1,046.17
person	Minimum	\$.00	\$.00	\$500.00	\$80.00	\$333.33	\$.00	\$.00	\$.00	\$.00	\$83.33	\$991.04	\$.00
expense	Maximum	\$5,955.86	\$3,294.07	\$3,021.44	\$4,065.40	\$1,418.94	\$3,294.07	\$5,955.86	\$5,955.86	\$4,505.15	\$3,012.88	\$4,141.10	\$4,065.40

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 201w and Overall Oct 2011 - July 2012											
	Oct-11	Nov-1	Dec-11	Jan-1	Feb-1	Mar-1	Apr-1	May-1	Jun-1	Jul-12	Combined Oct 2011 - July 2012
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	2	2	1	1	3	2	2			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										
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			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
% 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%

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 July 2012 Period. By rank order they are:
 - **Quality of daytime tours,**
 - **Quality of shopping, and**
 - **Quality of hotel accommodations.**
- With all three factors the overall r^2 is .417 meaning that **41.7% 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, Feb, Mar, Apr, May, June, July 2012 and Overall Oct 2011 - July 2012

	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Combined Oct 2011 - July 2012
Independent Variables:	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%	2.6%

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 one significant factor in the July 2012 Period. That is:
 - **Variety of daytime tours.**
- This factor has an r^2 of .026 meaning that **2.6% of per person on island expenditure is accounted for by this factor.**