



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

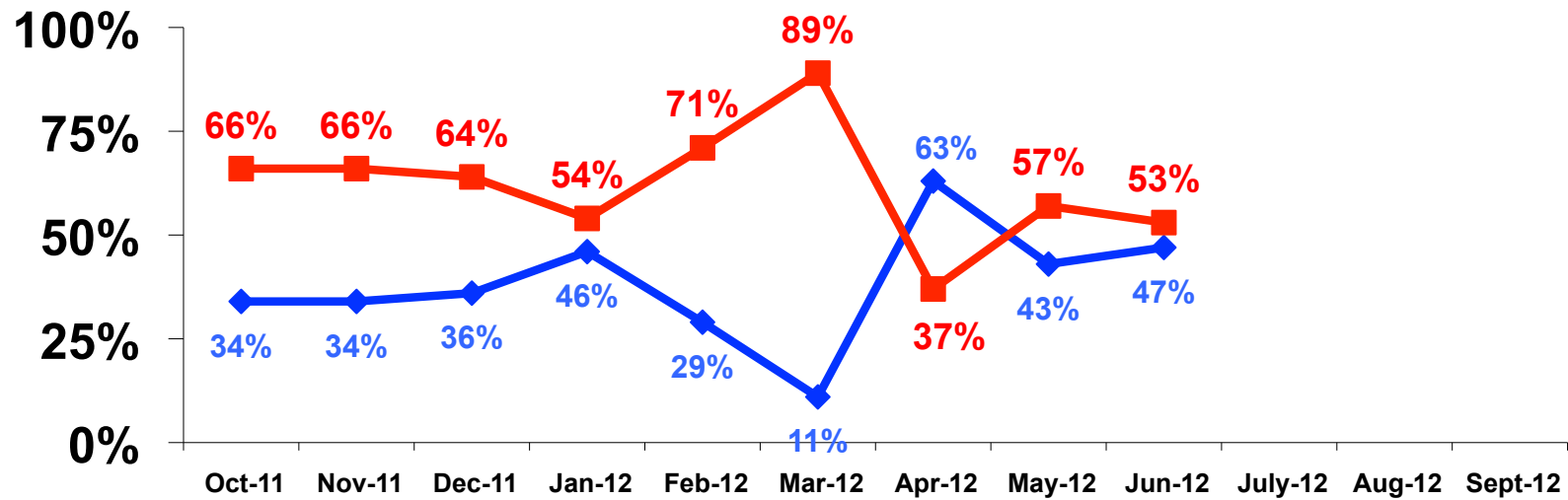
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.18/Q.19/Q.28
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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

SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status Tracking

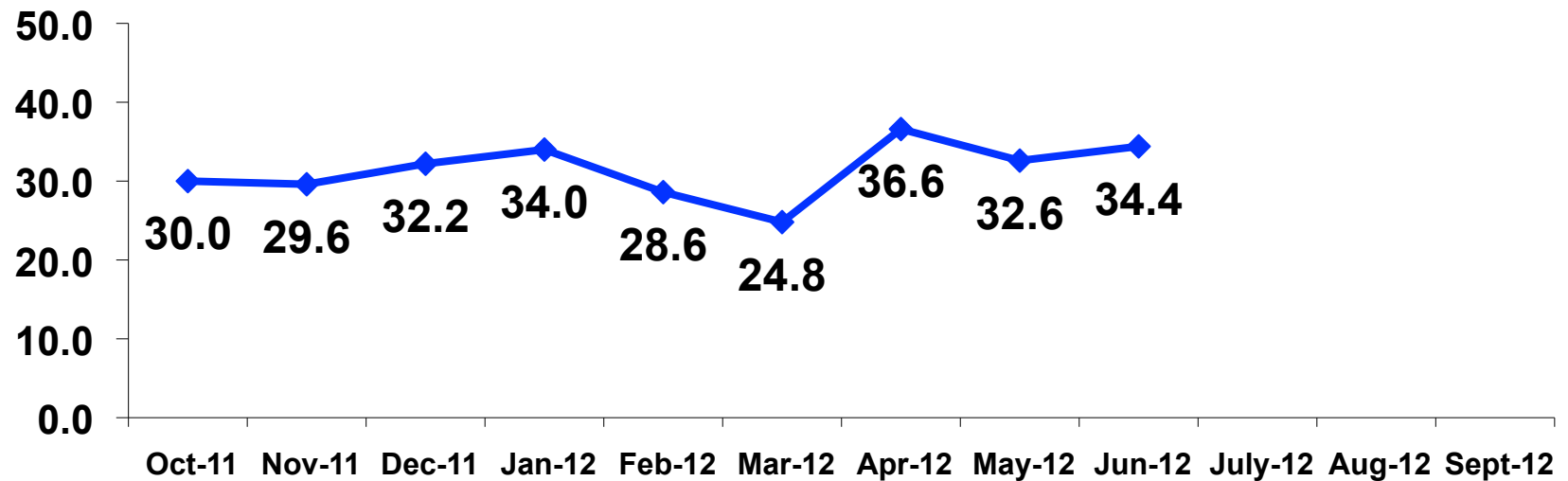


◆ Married ■ Single

Marital Status Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT	
C. Married	Count	154	49	4	6	13	24	87	64	66	21	26	75
	Col %	47%	74%	11%	55%	81%	63%	45%	30%	80%	100%	100%	54%
Single	Count	172	17	33	5	3	14	107	152	17			64
	Col %	53%	26%	89%	45%	19%	37%	55%	70%	20%			46%
Total	Count	326	66	37	11	16	38	194	216	83	21	26	139

Average Age Tracking



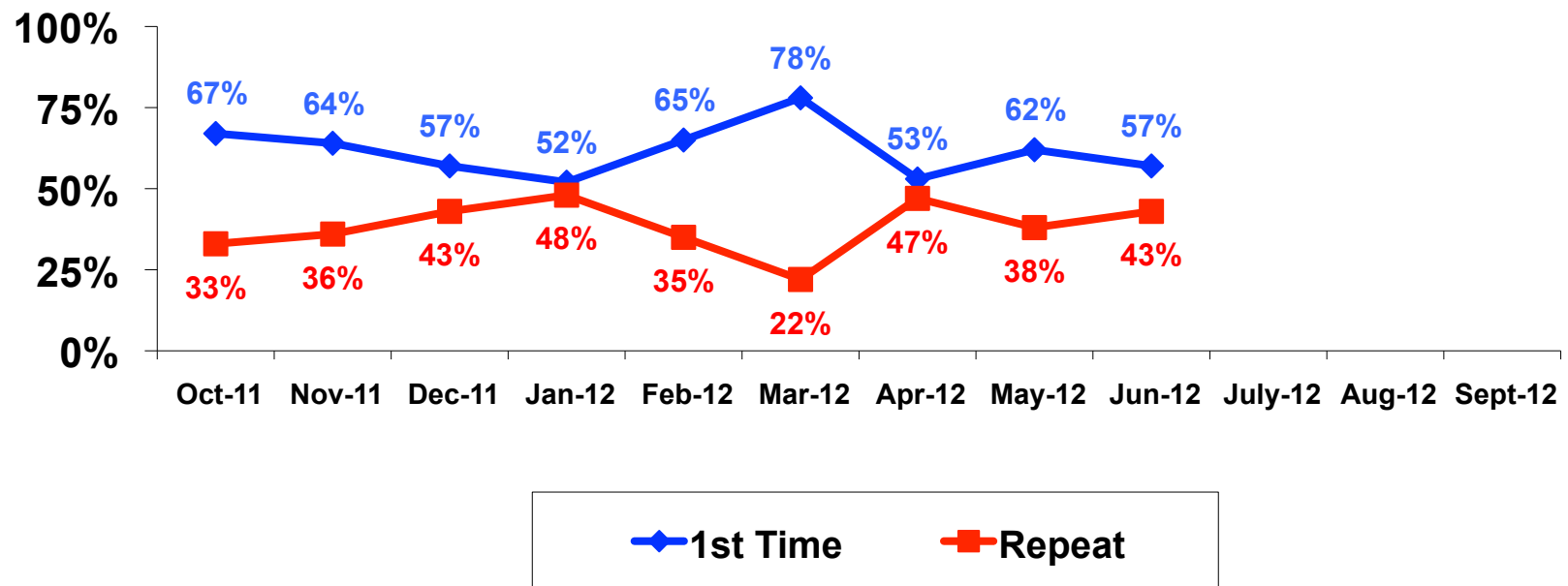
Age Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
D.	18-34	Count	210	28	32	7		28	132	210		7	21	71
		Col %	64%	42%	86%	64%		74%	68%	97%		33%	81%	51%
	35-54	Count	85	26	4	2		7	46	6	79	13	5	50
		Col %	26%	39%	11%	18%		18%	24%	3%	95%	62%	19%	36%
	55+	Count	31	12	1	2	16	3	16		4	1		18
		Col %	10%	18%	3%	18%	100%	8%	8%		5%	5%		13%
Total	Count		326	66	37	11	16	38	194	216	83	21	26	139
D.	Mean		34.4	40.7	28.9	36.1	65.3	32.9	33.4	27.1	44.3	40.0	30.3	37.6
	Median		30	37	26	32	64	30	29	27	42	39	29	33

Income Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.31	Less than Y2 million	Count	24	4	3	1	1	2	16	19	3		1	7
		Col %	9%	7%	9%	9%	7%	6%	9%	11%	4%		5%	6%
	Y2,000,001 - Y3,000,000	Count	48	6	5	2	2	4	32	41	5	1		13
		Col %	17%	10%	15%	18%	14%	11%	18%	23%	6%	6%		10%
	Y3,000,001 - Y4,000,000	Count	43	10	11	3	2	7	25	38	2	3	6	18
		Col %	15%	17%	33%	27%	14%	20%	14%	21%	3%	17%	27%	14%
	Y4,000,001 - Y5,000,000	Count	42	13	2		3	9	21	22	16	1	3	21
		Col %	15%	22%	6%		21%	26%	12%	12%	21%	6%	14%	17%
	Y5,000,001 - Y7,000,000	Count	45	7	4	1	3	5	33	26	14	4	6	19
		Col %	16%	12%	12%	9%	21%	14%	19%	14%	18%	22%	27%	15%
	Y7,000,001 - Y10,000,000	Count	37	9	4	3	1	4	18	15	18	3	4	22
		Col %	13%	16%	12%	27%	7%	11%	10%	8%	23%	17%	18%	17%
	Y10,000,001 or more	Count	43	9	4	1	2	4	28	19	19	6	2	26
		Col %	15%	16%	12%	9%	14%	11%	16%	11%	25%	33%	9%	21%
Total	Count		282	58	33	11	14	35	173	180	77	18	22	126

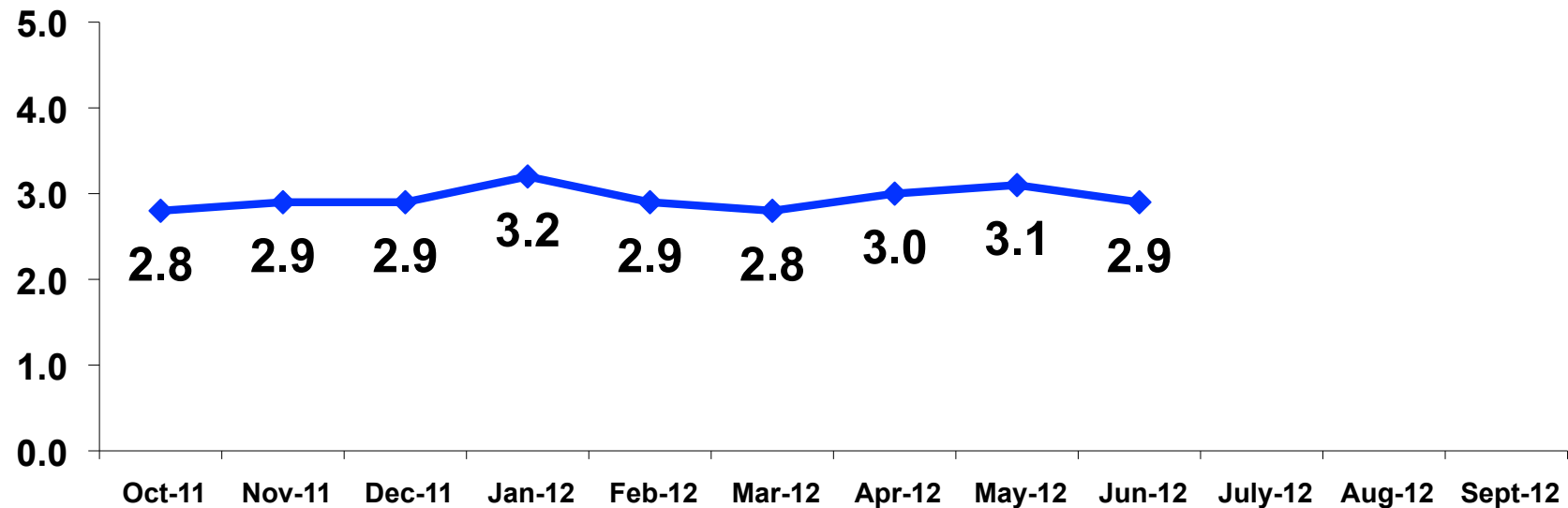
Prior Trips To Guam Tracking



Prior Trips To Guam Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.3A Yes	Count		187	39	18	4	8	31	120	143	33	7	20	
	Col %		57%	59%	49%	36%	50%	82%	62%	67%	40%	33%	77%	
No	Count		139	27	19	7	8	7	74	72	50	14	6	139
	Col %		43%	41%	51%	64%	50%	18%	38%	33%	60%	67%	23%	100%
Total	Count		326	66	37	11	16	38	194	215	83	21	26	139

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	3.1	2.7	2.8	3.3	3.0	2.9	2.8	2.9	2.9	3.7	2.9
Median	3	3	3	3	3	3	3	3	3	3	4	3
Minimum	1	1	1	2	2	2	1	1	1	1	1	1
Maximum	8	8	4	4	7	7	8	7	8	4	7	8

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	96	24	13		4	20	58	66	22	6	15	33
		Col %	29%	36%	35%		25%	53%	30%	31%	27%	29%	58%	24%
	Free-time package tours	Count	200	34	24		10	13	118	129	55	13	9	91
		Col %	61%	52%	65%		63%	34%	61%	60%	66%	62%	35%	65%
	Individually arranged travel	Count	12	7			2	4	8	8	2	2	1	7
		Col %	4%	11%			13%	11%	4%	4%	2%	10%	4%	5%
	Group tour	Count	11			11			6	7	2		1	7
		Col %	3%			100%			3%	3%	2%		4%	5%
	Other	Count	2	1				1		1	1			
		Col %	1%	2%				3%		0%	1%			
	Company paid travel	Count	5						4	4	1			1
		Col %	2%						2%	2%	1%			1%
Total	Count	326	66	37	11	16	38	194	215	83	21	26	139	

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	56%	58%	73%	27%	44%	32%	57%	57%	59%	62%	58%	51%
Pleasure	45%	41%	57%	9%	31%	18%	46%	47%	43%	43%	23%	46%
Short travel time	39%	38%	43%	27%	63%	11%	40%	33%	48%	52%	12%	47%
Shopping	35%	26%	43%	27%	25%	5%	37%	34%	35%	29%	8%	41%
A previous visit	27%	33%	24%	27%	38%	11%	25%	20%	42%	57%	12%	53%
Price of the tour package	31%	26%	30%	18%	38%		36%	27%	39%	24%	12%	37%
Just to relax	28%	18%	32%	9%	19%		30%	27%	34%	33%	4%	33%
Recommendation of friend, relative, travel agency	21%	23%	27%	27%	38%	8%	25%	21%	14%	19%	4%	14%
It is a safe place to spend a vacation	17%	30%	11%	9%	38%	5%	17%	11%	25%	29%	15%	22%
Water sports	16%	11%	24%	18%	13%	3%	27%	20%	10%	10%	8%	13%
To get married or Attend wedding	12%	27%	3%		6%	100%	9%	14%	6%	10%	27%	5%
Honeymoon	8%	9%		9%		18%	10%	11%	4%	10%	100%	4%
Company or Business trip	5%	2%		73%	6%		6%	6%	2%	5%		5%
To golf	4%	5%	3%		31%		6%	2%	1%	14%		7%
SCUBA diving	4%	2%	3%				7%	5%	2%			4%
Other	3%	3%	5%		13%	3%	1%	2%	6%			2%
To visit friends or relatives	2%		3%				2%	1%	5%			3%
Promotional materials from GVB	2%						2%	2%	1%		8%	1%
Organized Sporting Activity	1%	2%				3%	2%	2%			4%	1%
My company sponsored me	1%	2%					1%	1%				1%
Career certification or testing	0%						1%	0%				
Total Cases	326	66	37	11	16	38	194	215	83	21	26	139

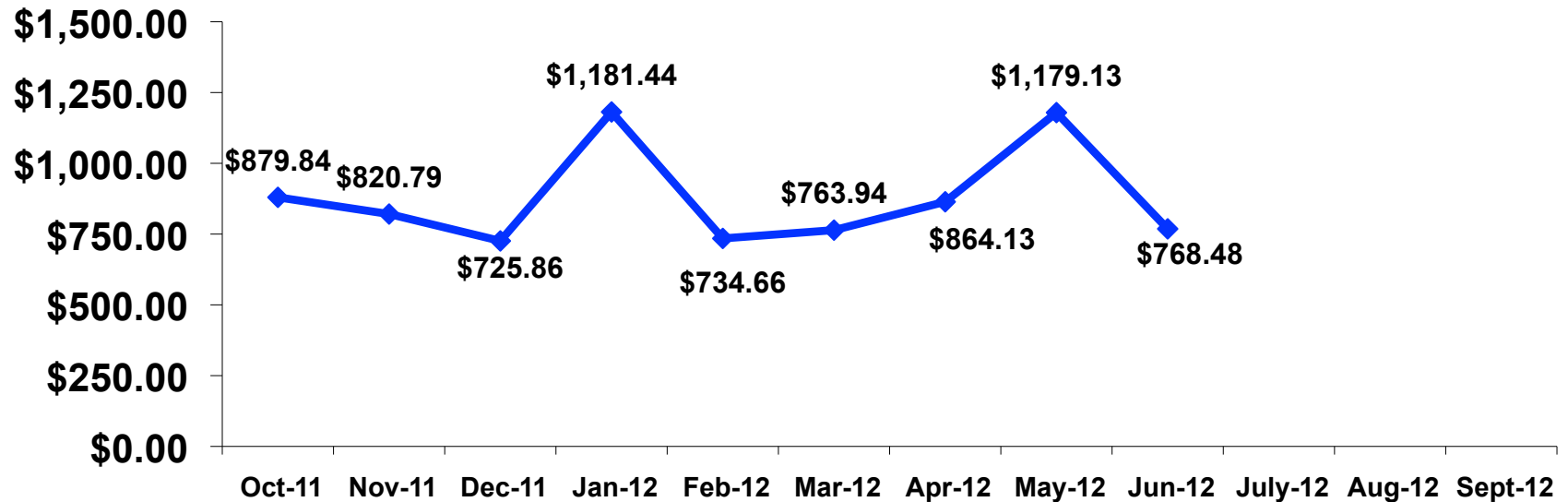
Information Sources Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.1 Internet	65%	69%	69%	45%	73%	59%	67%	62%	75%	65%	50%	53%
Travel guide book at bookstores	57%	50%	69%	55%	33%	43%	55%	61%	49%	45%	58%	59%
I have been to Guam before	37%	39%	44%	55%	40%	16%	32%	29%	54%	70%	19%	37%
Travel agent brochure	41%	36%	33%	45%	27%	46%	43%	44%	35%	40%	81%	30%
Magazine	22%	22%	22%	9%	13%	22%	25%	25%	20%	5%	35%	15%
Friend or relative	19%	23%	19%	9%	7%	38%	22%	24%	8%	10%	15%	13%
TV	6%	11%	3%		7%	5%	7%	5%	9%	5%	4%	4%
Company travel department	5%	6%		9%		5%	5%	7%	4%		8%	4%
GVB promotional activities	2%	2%			7%	3%	2%	1%	3%			2%
Newspaper	1%	3%			13%		2%		3%			1%
GVB office	1%	2%				3%	1%	0%	3%			1%
Other	1%	2%			7%		1%	0%				1%
Total Cases	319	64	36	11	15	37	189	214	80	20	26	135

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

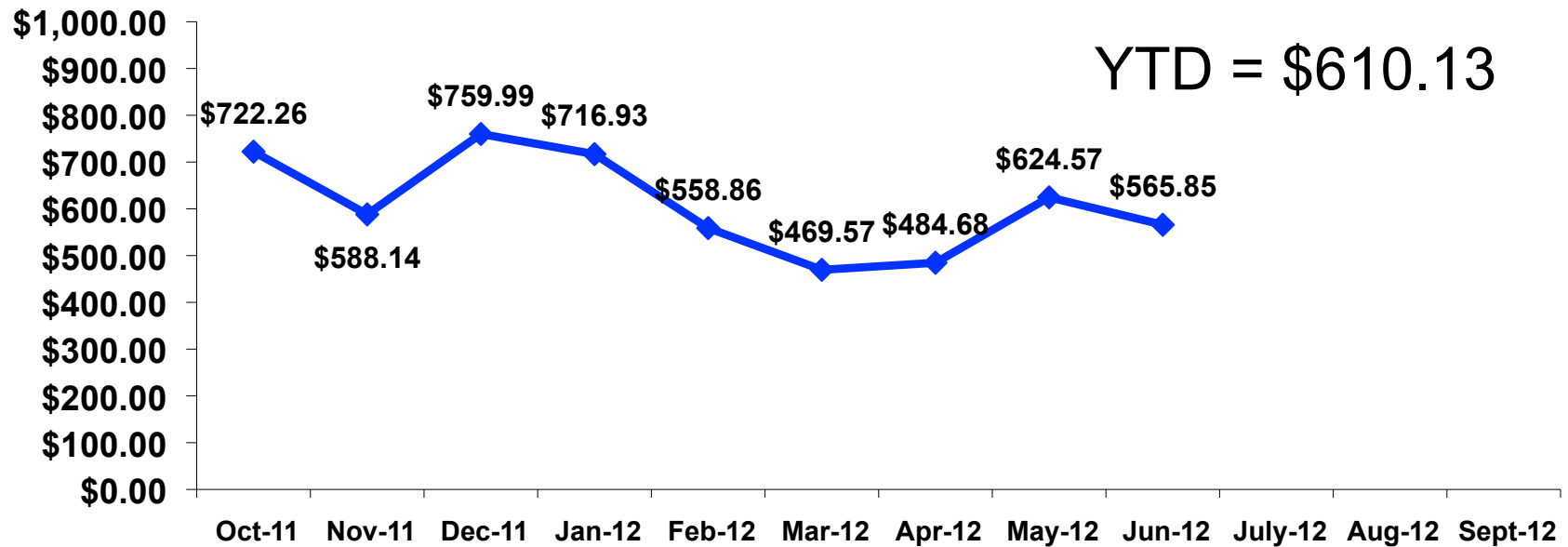
YTD=\$879.81



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Prepaid	Mean	\$768.48	\$751.12	\$824.12	\$336.00	\$795.74	\$976.68	\$783.26	\$770.06	\$776.28	\$728.06	\$1,491.28	\$702.44
per	Median	\$632	\$632	\$670	\$0	\$569	\$632	\$632	\$632	\$758	\$790	\$1,390	\$632
person	Minimum	\$0	\$0	\$486.48	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
converted to \$	Maximum	\$5,686.13	\$5,686.13	\$3,369.56	\$1,642.66	\$3,790.75	\$5,686.13	\$5,686.13	\$5,686.13	\$1,642.66	\$1,474.18	\$5,686.13	\$1,895.38

On-Island Expenditures Tracking



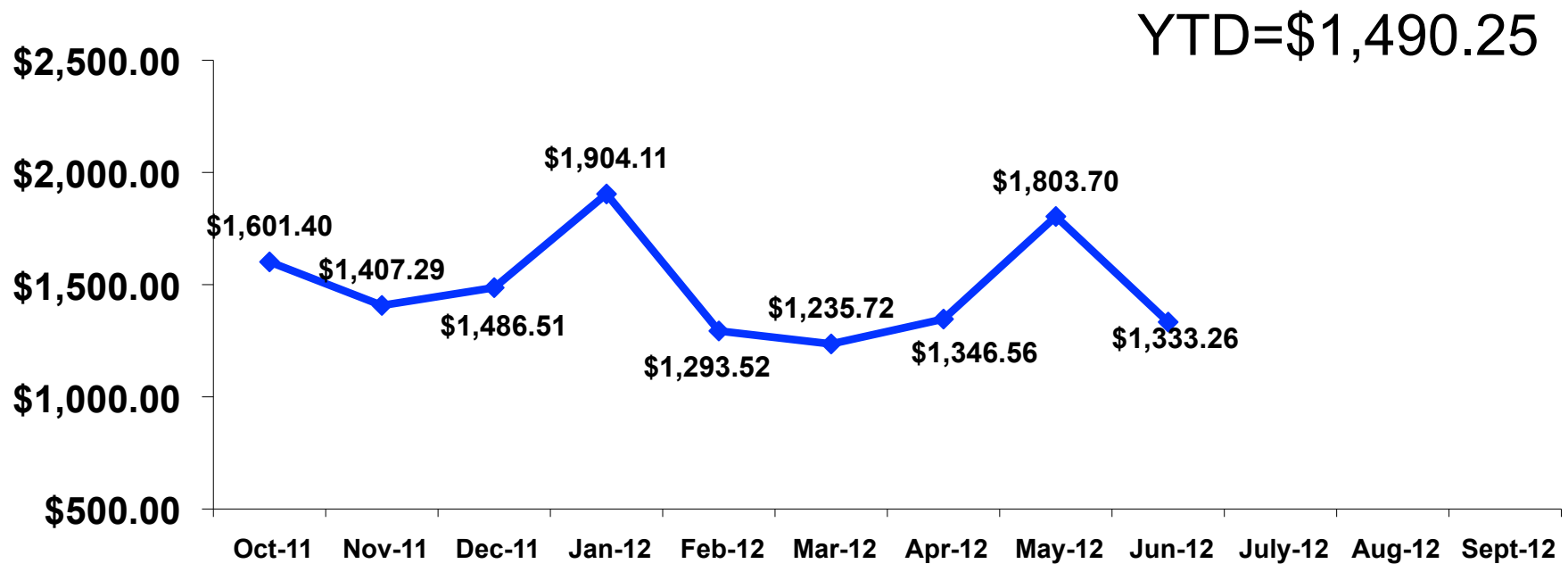
On-Island Expenditures Per Person Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT	
Per person on-island exp	Mean	\$565.85	\$466.40	\$609.21	\$583.64	\$395.17	\$492.49	\$591.88	\$560.40	\$558.30	\$424.03	\$751.26	\$572.32
	Median	\$450	\$380	\$500	\$400	\$408	\$425	\$500	\$459	\$420	\$333	\$576	\$470
	Minimum	\$0.00	\$0.00	\$0.00	\$50.00	\$125.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Maximum	\$4,000.00	\$4,000.00	\$2,094.00	\$1,500.00	\$900.00	\$3,000.00	\$4,000.00	\$4,000.00	\$3,520.00	\$1,250.00	\$2,200.00	\$2,623.00

On-Island Expense Breakdown

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
F&B-HOTEL	Mean	\$34.98	\$69.02	\$14.86	\$6.82	\$64.87	\$26.00	\$31.18	\$17.61	\$71.67	\$112.19	\$50.38	\$55.11
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00
F&B-FF	Mean	\$28.92	\$30.26	\$19.07	\$49.09	\$46.88	\$20.13	\$32.26	\$23.80	\$35.65	\$35.48	\$30.19	\$29.48
REST/CONV	Median	\$10.00	\$0.00	\$0.00	\$10.00	\$45.00	\$0.00	\$10.00	\$6.50	\$15.00	\$0.00	\$0.00	\$10.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$78.60	\$107.52	\$34.46	\$71.82	\$129.50	\$67.16	\$86.60	\$54.69	\$127.61	\$144.05	\$52.12	\$83.24
	Median	\$15.00	\$5.00	\$0.00	\$0.00	\$100.00	\$0.00	\$30.00	\$0.00	\$50.00	\$0.00	\$0.00	\$40.00
OPTIONAL TOUR	Mean	\$71.29	\$105.23	\$54.62	\$37.27	\$94.69	\$20.11	\$91.45	\$60.77	\$84.01	\$137.62	\$36.38	\$56.88
	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
GIFT/ SOUV-SELF	Mean	\$208.90	\$165.94	\$216.38	\$82.27	\$82.50	\$144.87	\$217.20	\$185.92	\$252.55	\$187.86	\$203.85	\$262.53
	Median	\$50.00	\$50.00	\$100.00	\$0.00	\$20.00	\$0.00	\$50.00	\$48.50	\$100.00	\$0.00	\$0.00	\$100.00
GIFT/SOUV- F&F AT HOME	Mean	\$112.61	\$104.91	\$119.59	\$90.91	\$95.88	\$99.63	\$107.23	\$92.34	\$152.92	\$79.05	\$100.38	\$129.35
	Median	\$50.00	\$20.00	\$50.00	\$0.00	\$85.00	\$0.00	\$50.00	\$30.00	\$90.00	\$0.00	\$0.00	\$50.00
LOCAL TRANS	Mean	\$14.90	\$16.20	\$11.89	\$0.00	\$32.13	\$20.50	\$16.65	\$11.32	\$18.41	\$18.76	\$13.27	\$20.53
	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	\$294.29	\$428.44	\$188.19	\$518.18	\$173.94	\$408.87	\$287.94	\$303.24	\$243.13	\$988.57	\$857.31	\$283.28
	Median	\$0.00	\$0.00	\$0.00	\$220.00	\$0.00	\$7.50	\$0.00	\$0.00	\$0.00	\$50.00	\$500.00	\$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	\$1,333.26	\$1,215.66	\$1,428.14	\$919.63	\$1,190.91	\$1,469.17	\$1,375.14	\$1,329.34	\$1,333.42	\$1,152.10	\$2,242.54	\$1,274.76
per	Median	\$1,168.61	\$1,066.94	\$1,283.97	\$681.79	\$943.26	\$1,202.34	\$1,171.33	\$1,157.06	\$1,258.73	\$1,152.17	\$2,092.30	\$1,197.69
person	Minimum	\$0.00	\$0.00	\$606.52	\$200.00	\$200.00	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
expense	Maximum	\$6,136.13	\$6,136.13	\$3,869.56	\$2,892.66	\$4,190.75	\$6,136.13	\$6,136.13	\$6,136.13	\$3,520.00	\$2,263.58	\$6,136.13	\$3,507.51

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 2012 and Overall Oct 2011- June 2012

	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Combined Oct 2011- Jun 2012
Independent Variables:	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	4
Variety of daytime tours	2									
Quality of nighttime tours										
Variety of nighttime tours										
Quality of shopping	4	1	7		2	2	4		1	2
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	1
% of Overall Satisfaction Accounted For	49.9%	46.6%	50.2%	43.1%	43.9%	39.4%	46.2%	53.9%	49.6%	46.7%

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 June 2012 Period. By rank order they are:
 - **Quality of shopping,**
 - **Quality of hotel accommodations, and**
 - **Quality of daytime tours.**
- With all three factors the overall r^2 is .496 meaning that **49.6% 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 2012 and Overall Oct 2011 - June 2012

	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Combine d Oct 2011 - June 2012
Independent Variables:	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						
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%	2.9%

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 June 2012 Period. That factor is:
 - **Price of things on Guam.**
- This factor has an overall r^2 of .017 meaning that **1.7% of per person on island expenditure is accounted for by this factor.**