



**GUAM VISITORS BUREAU**  
**Japan Visitor Tracker Exit Profile**  
**FY2010 MARKET SEGMENTATION –**  
**MARCH 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.

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# 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.

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# Highlighted Segments

## Parameters

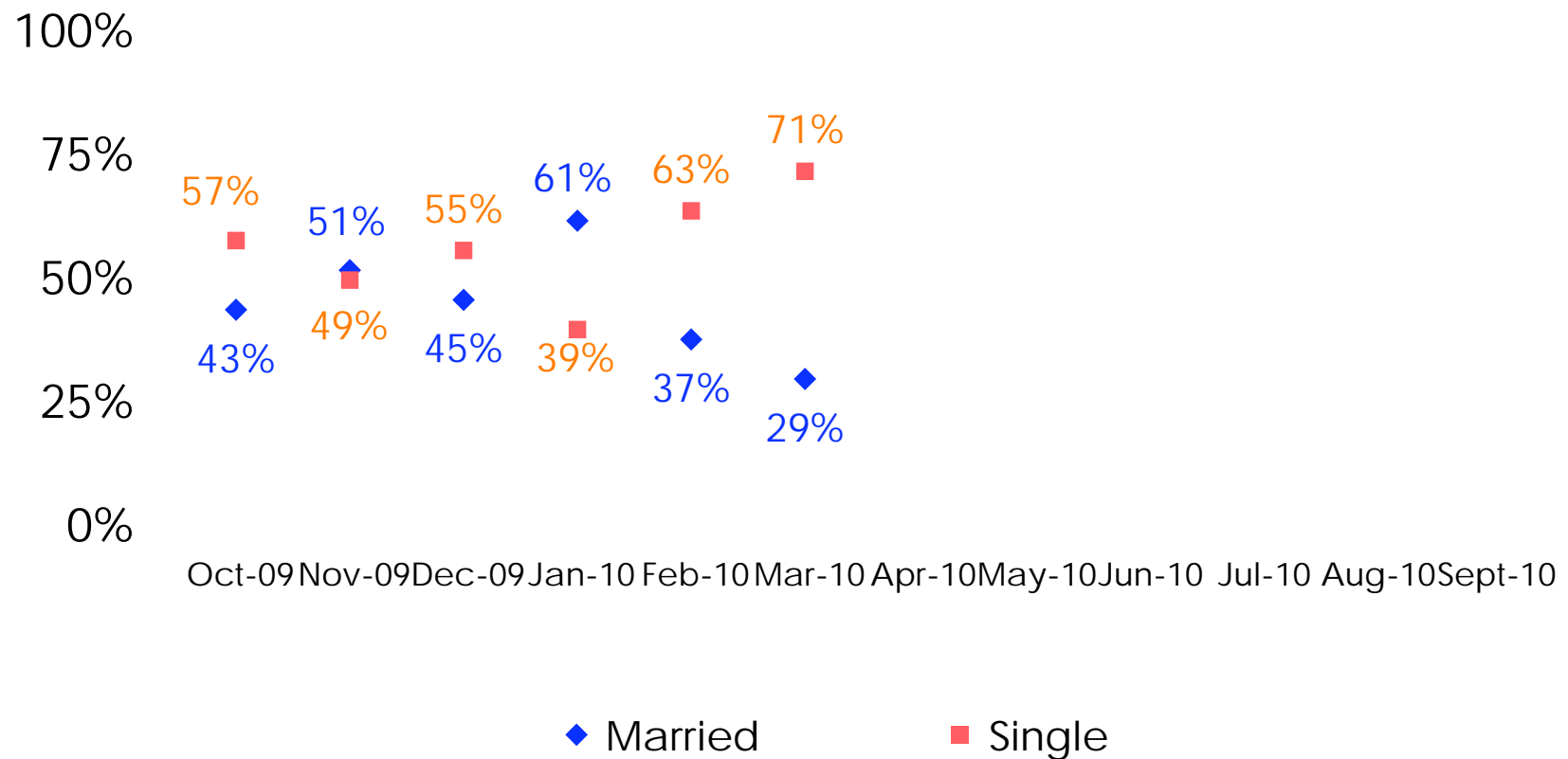
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

# 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%	15%						
Repeaters	40%	33%	40%	42%	38%	25%						
Shoppers	49%	52%	46%	49%	47%	51%						
Seniors	5%	6%	9%	8%	7%	4%						
OL/Salary- woman	15%	12%	12%	13%	11%	4%						
Group Travelers	3%	7%	3%	4%	4%	3%						
Students	9%	10%	16%	10%	29%	52%						
Golfers	4%	6%	6%	6%	5%	7%						
Wedding	8%	12%	7%	8%	6%	6%						
Divers	6%	12%	10%	11%	10%	12%						
Honey- mooners	11%	9%	8%	7%	4%	6%						
TOTAL	328	330	330	330	330	330						

SECTION 1  
**PROFILE OF RESPONDENTS**

# Marital Status Tracking

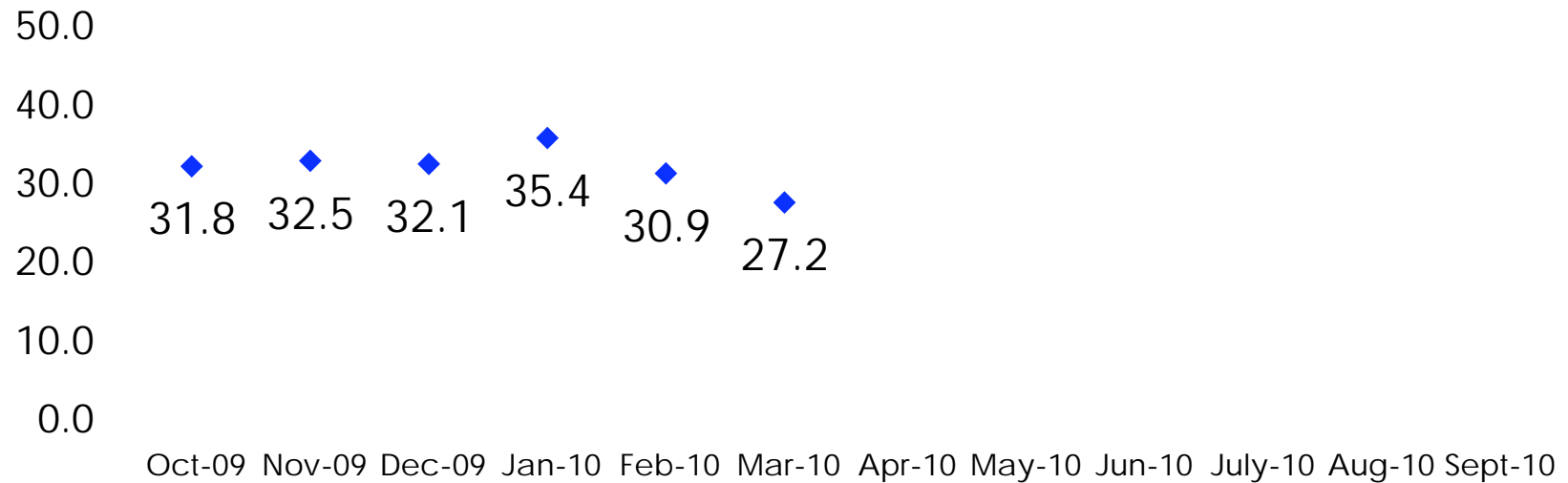


# Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
C. Married	Count		97	35	43	42	6	4	3	6	13	17	8	16
	Col %		29%	71%	52%	25%	46%	40%	2%	26%	72%	94%	20%	94%
Single	Count		233	14	40	126	7	6	168	17	5	1	33	1
	Col %		71%	29%	48%	75%	54%	60%	98%	74%	28%	6%	80%	6%
Total	Count		330	49	83	168	13	10	171	23	18	18	41	17



# Average Age Tracking



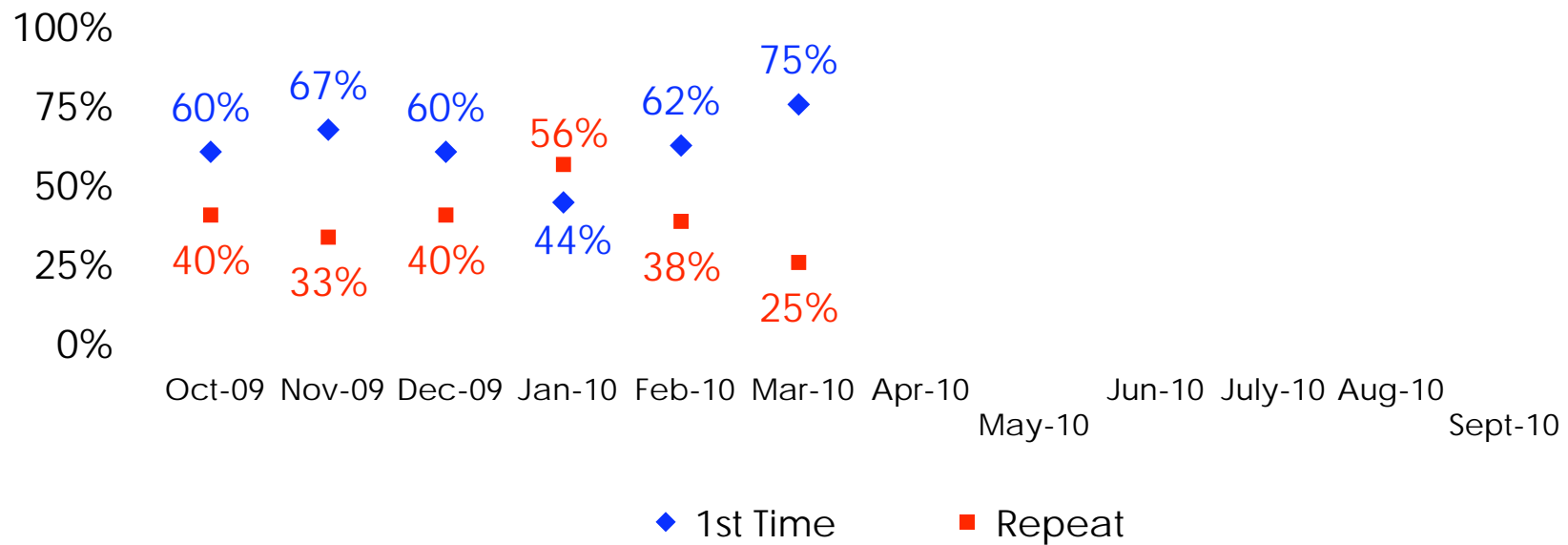
# Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	276	24	51	144	8	7	171	21	15	17	37	
		Col %	84%	49%	61%	86%	62%	70%	100%	91%	83%	94%	90%	
	35-54	Count	44	20	25	17	4	2			2	1	4	7
		Col %	13%	41%	30%	10%	31%	20%			11%	6%	10%	41%
	55+	Count	10	5	7	7	1	1		2	1			10
		Col %	3%	10%	8%	4%	8%	10%		9%	6%			59%
Total	Count		330	49	83	168	13	10	171	23	18	18	41	17
D.	Mean		27.2	36.4	33.4	27.0	33.0	30.2	21.5	28.1	30.2	26.6	24.6	56.7
	Median		23	35	30	22	29	26	22	23	28	25	23	57

# Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than Y2 million	Count	23		3	13		1	19				2	1
		Col %	8%		4%	9%		11%	15%				5%	6%
	Y2,000,001 - Y3,000,000	Count	26	3	3	15	2	1	5	3	5	5	1	
		Col %	10%	7%	4%	11%	15%	11%	4%	13%	29%	29%	3%	
	Y3,000,001 - Y4,000,000	Count	35	3	11	18	1	2	7	4	1	5	5	2
		Col %	13%	7%	14%	13%	8%	22%	6%	17%	6%	29%	13%	13%
	Y4,000,001 - Y5,000,000	Count	27	5	10	13	2	2	8	1	3	3	7	1
		Col %	10%	11%	13%	9%	15%	22%	6%	4%	18%	18%	18%	6%
	Y5,000,00 - Y7,000,000	Count	53	13	18	32	3		18	6	2	2	6	4
		Col %	19%	29%	24%	23%	23%		14%	26%	12%	12%	16%	25%
	Y7,000,001 - Y10,000,000	Count	38	10	13	13	2	2	17	1	4	2	4	5
		Col %	14%	22%	17%	9%	15%	22%	13%	4%	24%	12%	11%	31%
	Y10,000,001 or more	Count	42	10	15	18	3	1	24	3	2		7	3
		Col %	15%	22%	20%	13%	23%	11%	19%	13%	12%		18%	19%
	No Income	Count	29	1	3	16			28	5			6	
		Col %	11%	2%	4%	12%			22%	22%			16%	
Total	Count		273	45	76	138	13	9	126	23	17	17	38	16

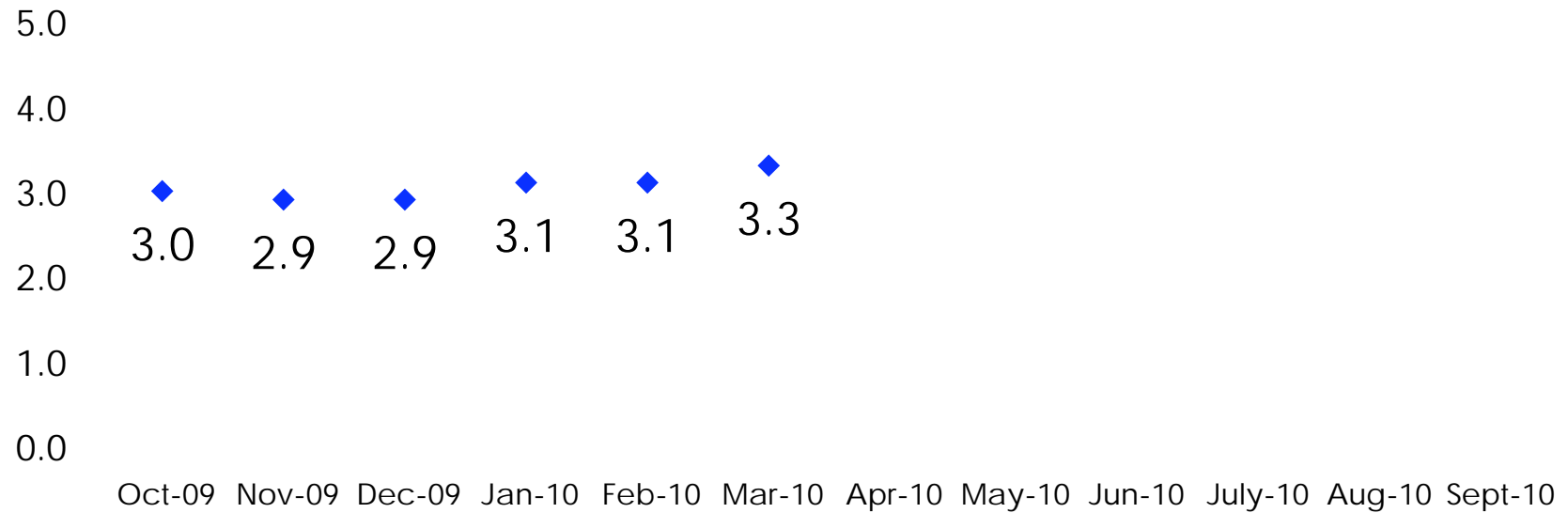
# Prior Trips To Guam Tracking



# Prior Trips To Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		247	25		139	7	6	152	15	12	16	32	6
	Col %		75%	51%		83%	54%	60%	89%	65%	67%	89%	78%	35%
No	Count		83	24	83	29	6	4	19	8	6	2	9	11
	Col %		25%	49%	100%	17%	46%	40%	11%	35%	33%	11%	22%	65%
Total	Count		330	49	83	168	13	10	171	23	18	18	41	17

# 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	3.3	3.3	3.8	3.2	4.8	2.7	3.0	4.3	4.7	3.8	3.0	3.8
Median	3	3	3	3	3	3	3	3	4	4	3	4
Minimum	1	2	1	2	3	2	1	2	2	2	2	2
Maximum	23	7	23	8	23	4	6	15	23	7	4	7

# 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	75	11	16	42	6		40	6	6	6	10	5
		Col %	23%	22%	19%	25%	46%		24%	26%	33%	33%	24%	29%
	Free-time package tours	Count	213	25	42	108	6		124	11	11	11	28	5
		Col %	65%	51%	51%	65%	46%		73%	48%	61%	61%	68%	29%
	Individually arranged travel	Count	29	13	20	13	1		2	4	1	1	1	6
		Col %	9%	27%	24%	8%	8%		1%	17%	6%	6%	2%	35%
	Group tour	Count	10		4	4		10	4	1			2	1
		Col %	3%		5%	2%		100%	2%	4%			5%	6%
	Other	Count	2		1					1				
		Col %	1%		1%					4%				
Total	Count	329	49	83	167	13	10	170	23	18	18	41	17	

# Travel Motivation Segmentation

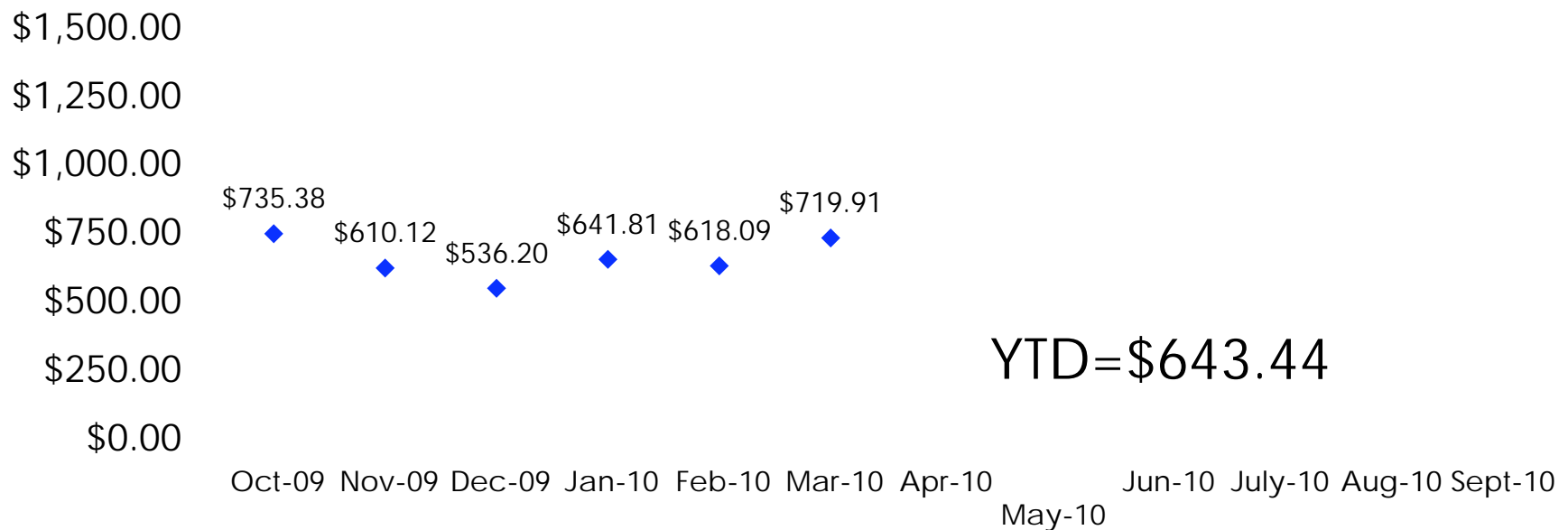
	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Beautiful seas, beaches, tropical climate	63%	57%	57%	61%	46%	30%	68%	65%	33%	67%	68%	47%
Pleasure	50%	45%	45%	57%	23%	20%	59%	57%	17%	39%	54%	41%
Short travel time	38%	41%	45%	39%	31%	20%	31%	48%	6%	33%	41%	47%
Price of the tour package	34%	24%	29%	32%	23%	10%	39%	22%	6%	22%	22%	12%
Just to relax	28%	39%	35%	30%	23%		25%	35%	6%	6%	34%	24%
Shopping	27%	31%	31%	32%	8%		36%	22%			10%	24%
Recommendation of friend, relative, travel agency	24%	22%	12%	26%	15%	40%	29%	22%	6%	17%	29%	29%
Water sports	20%	12%	18%	22%	15%		25%	17%	11%	22%	34%	6%
A previous visit	15%	33%	59%	11%	15%	10%	5%	22%	28%	11%	12%	35%
It is a safe place to spend a vacation	11%	18%	20%	10%	8%	10%	9%	13%			12%	24%
Other	9%	6%	4%	13%			13%	9%		6%	10%	6%
To get married or Attend wedding	5%	14%	7%	5%	54%			4%	100%	28%	2%	6%
SCUBA diving	5%	2%	4%	5%	8%		7%	4%		6%	29%	
Honeymoon	5%	4%	2%	3%			1%	9%	28%	100%	7%	
To golf	3%	4%	6%	2%	8%		1%	17%	6%		2%	12%
Company or Business trip	2%		4%	2%		30%	1%	4%				12%
To visit friends or relatives	2%	4%	2%	2%			2%					
My company sponsored me	1%		1%	1%		20%	1%				2%	
Organized Sporting Activity	1%		2%			10%	1%					
Special promotion	1%			1%			1%					
Career certification or testing	0%	2%	1%	1%								
Convention, Conference, Trade show	0%			1%							2%	
Promotional materials from GVB	0%			1%			1%					
Total Cases	329	49	83	168	13	10	171	23	18	18	41	17

# Information Sources Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1												
Travel guide book at bookstores	68%	61%	63%	70%	83%	78%	67%	64%	83%	76%	70%	44%
Internet	64%	67%	73%	61%	75%	56%	61%	55%	67%	47%	58%	50%
Travel agent brochure	53%	39%	41%	53%	50%	33%	57%	32%	61%	71%	50%	38%
Friend or relative	28%	20%	18%	30%	33%	22%	34%	32%	28%	24%	30%	19%
Magazine	27%	33%	25%	30%	25%	22%	29%	27%	28%	29%	23%	25%
I have been to Guam before	22%	48%	87%	16%	50%	33%	9%	32%	33%	12%	15%	56%
TV	10%	9%	11%	10%	17%		12%		6%		13%	6%
Company travel department	3%	2%	1%	4%	8%		1%	9%	6%		3%	
GVB promotional activities	2%	4%	1%	2%	8%		2%	5%	6%			
GVB office	1%	7%	1%	1%			1%				5%	
Newspaper	2%			2%			1%				3%	
Other	1%		2%					9%		6%	3%	6%
Total	324	46	83	165	12	9	171	22	18	17	40	16

# SECTION 3 **EXPENDITURES**

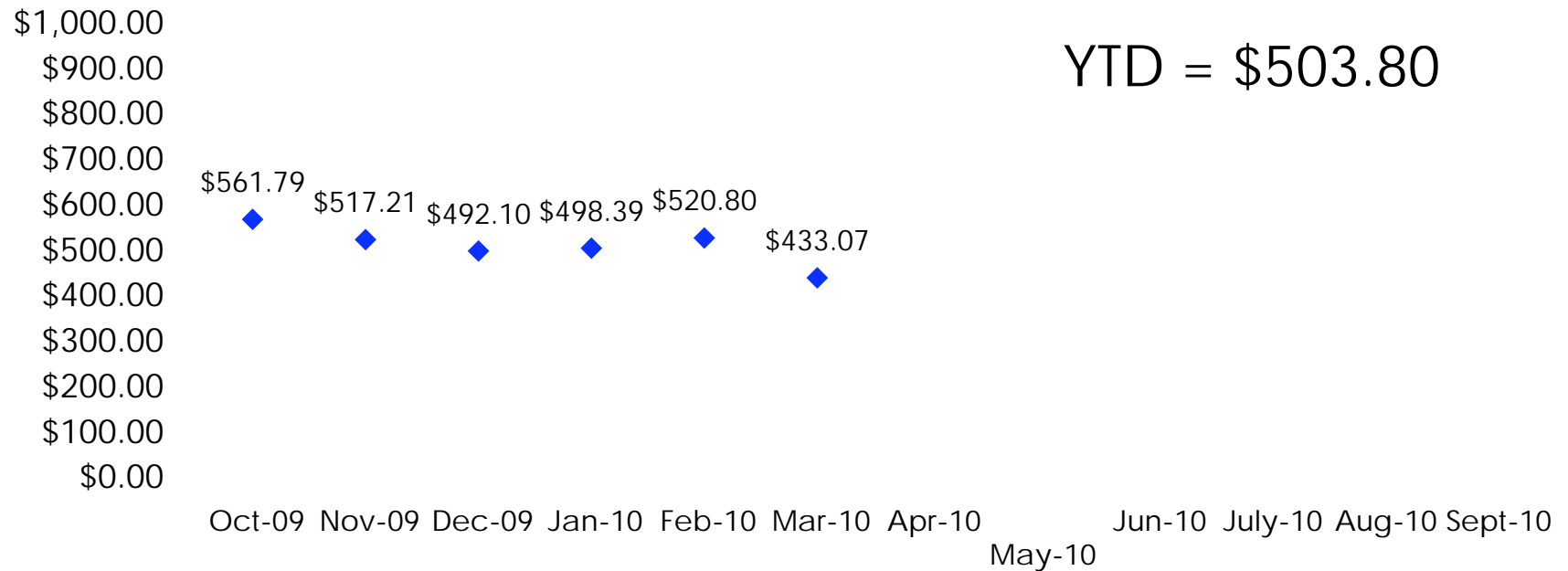
# Prepaid Expenditures Tracking



# Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid	Mean	\$719.91	\$735.48	\$818.88	\$660.29	\$824.78	\$1,294.88	\$607.45	\$635.64	\$1,021.09	\$1,366.42	\$654.87	\$925.91
per	Median	\$589	\$697	\$617	\$556	\$778	\$528	\$556	\$648	\$750	\$1,278	\$589	\$747
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$88.92	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
converted to \$	Maximum	\$9,447.59	\$4,445.93	\$9,447.59	\$5,779.70	\$1,667.22	\$9,447.59	\$5,001.67	\$2,445.26	\$5,779.70	\$5,779.70	\$1,556.07	\$4,445.93

# On-island Expenditures Tracking



# On-island Expenditures Per Person Segmentation

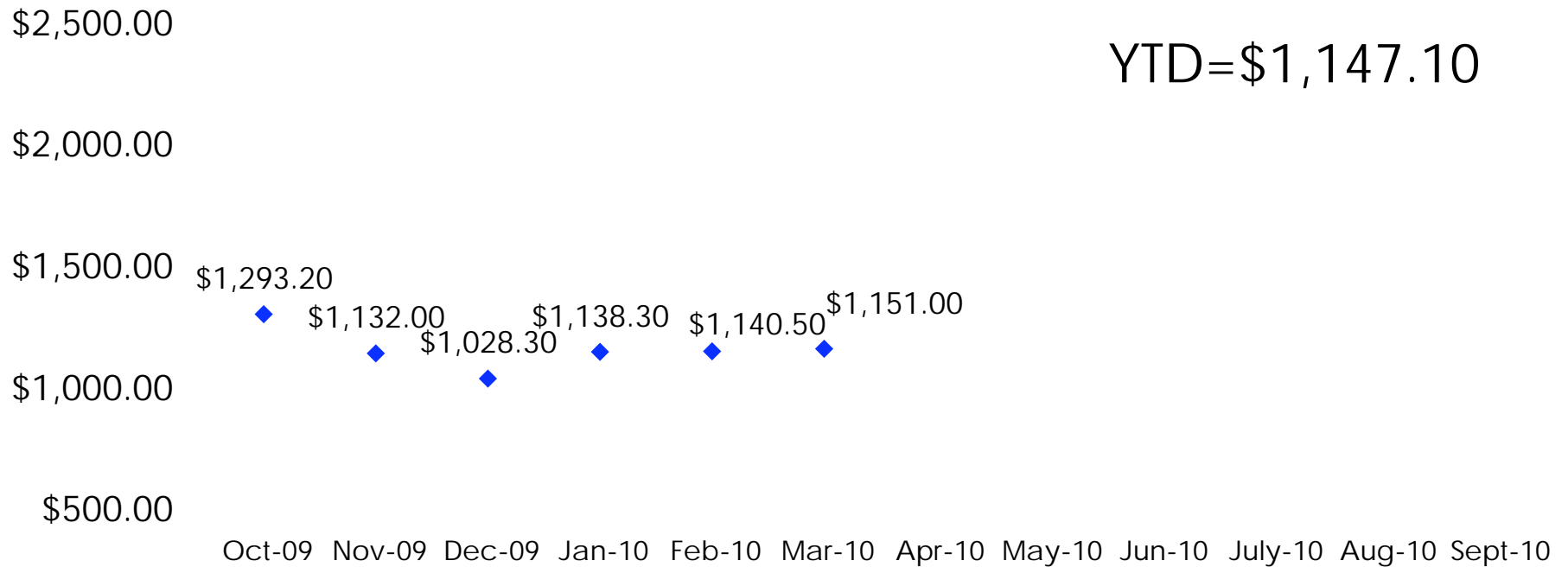
		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per	Mean	\$433.07	\$390.88	\$520.76	\$464.43	\$368.14	\$277.27	\$393.26	\$650.35	\$589.07	\$632.22	\$446.36	\$473.33
person	Median	\$350	\$283	\$370	\$390	\$300	\$300	\$325	\$400	\$500	\$500	\$400	\$333
on-island	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$80.00	\$0.00	\$0.00	\$0.00
exp	Maximum	\$3,000.00	\$1,333.33	\$3,000.00	\$3,000.00	\$700.00	\$550.00	\$1,450.00	\$2,500.00	\$2,050.00	\$2,050.00	\$985.00	\$1,250.00



# On-Island Expense Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$25.12	\$62.59	\$50.07	\$17.35	\$33.85	\$24.00	\$13.13	\$16.96	\$26.17	\$48.39	\$20.10	\$82.76
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$33.37	\$43.12	\$39.52	\$31.68	\$26.54	\$112.50	\$33.20	\$45.65	\$23.06	\$30.00	\$28.20	\$50.12
	Median	\$15.00	\$30.00	\$20.00	\$20.00	\$5.00	\$5.00	\$15.00	\$0.00	\$5.00	\$20.00	\$20.00	\$0.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$67.14	\$143.27	\$101.93	\$67.42	\$74.62	\$20.00	\$36.57	\$81.96	\$122.22	\$137.22	\$84.07	\$100.00
	Median	\$20.00	\$100.00	\$70.00	\$22.00	\$50.00	\$0.00	\$0.00	\$20.00	\$20.00	\$0.00	\$50.00	\$55.00
OPTIONAL TOUR	Mean	\$89.78	\$120.16	\$99.76	\$90.77	\$47.69	\$115.00	\$74.60	\$134.96	\$90.00	\$221.67	\$157.39	\$104.59
	Median	\$0.00	\$0.00	\$0.00	\$50.00	\$0.00	\$0.00	\$50.00	\$100.00	\$0.00	\$140.00	\$90.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$188.79	\$238.53	\$327.69	\$229.18	\$107.69	\$22.00	\$182.67	\$210.22	\$338.89	\$325.56	\$116.29	\$195.76
	Median	\$50.00	\$100.00	\$100.00	\$60.00	\$100.00	\$0.00	\$40.00	\$60.00	\$125.00	\$75.00	\$50.00	\$0.00
GIFT/ SOUV- F&F AT HOME	Mean	\$106.74	\$159.18	\$125.18	\$119.17	\$136.15	\$182.00	\$79.02	\$228.70	\$235.56	\$200.56	\$110.85	\$114.71
	Median	\$50.00	\$100.00	\$50.00	\$50.00	\$100.00	\$95.00	\$50.00	\$70.00	\$150.00	\$175.00	\$100.00	\$0.00
LOCAL TRANS	Mean	\$15.76	\$30.88	\$30.30	\$13.63	\$3.08	\$7.00	\$6.68	\$31.57	\$30.56	\$10.28	\$11.61	\$35.76
	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	\$143.25	\$161.53	\$188.01	\$125.22	\$282.31	\$67.50	\$88.85	\$235.83	\$140.78	\$250.50	\$137.80	\$284.71
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00

# Total Expenditures Tracking



# Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Total per person expense	Mean	\$1,150.96	\$1,126.36	\$1,332.57	\$1,120.92	\$1,192.92	\$1,572.15	\$996.55	\$1,285.99	\$1,610.16	\$1,998.64	\$1,101.23	\$1,399.24
	Median	\$978.04	\$1,035.82	\$1,022.41	\$982.66	\$1,144.66	\$814.32	\$904.79	\$916.89	\$1,163.30	\$1,791.97	\$1,037.16	\$1,273.04
	Minimum	\$ .00	\$ .00	\$ .00	\$ .00	\$372.25	\$ .00	\$ .00	\$ .00	\$294.49	\$769.59	\$ .00	\$ .00
	Maximum	\$9,997.59	\$4,765.93	\$9,997.59	\$6,279.70	\$1,917.22	\$9,997.59	\$5,451.67	\$4,445.26	\$6,279.70	\$6,279.70	\$2,541.07	\$4,765.93

SECTION 4  
**ADVANCED STATISTICS**

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# 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, Mar 2010, Overall Oct 2009 - Mar 2010

Independent Variables:	Oct-09 rank	Nov-09 rank	Dec-09 rank	Jan-10 rank	Feb-10 rank	Mar-10 rank	Combined Oct 2009 - Mar 2010 rank
Cleanliness of beaches & parks	4		3		3	2	3
Ease of getting around		2	4	2			5
Safety walking around at night							
Quality of daytime tours		3			4		4
Variety of daytime tours	3			4			
Quality of nighttime tours							
Variety of nighttime tours							
Quality of shopping	1	4		1		3	2
Variety of shopping			2		2		6
Price of things on Guam							
Quality of hotel accommodations	2	1	1	3	1	1	1
% of Overall Satisfaction Accounted For	52.1%	46.7%	49.2%	51.1%	41.4%	55.3%	49.3%

NOTE: Only significant variables are ranked.

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# Drivers Of Overall Satisfaction

- Overall satisfaction with the Japanese visitor's experience on Guam is driven by three significant factors in the March 2010 Period. By rank order they are:
  - Quality of hotel accommodations,
  - Cleanliness of beaches and parks, and
  - Quality of shopping.
- With all three factors the overall  $r^2$  is .553 meaning that 55.3% of overall satisfaction is accounted for by these three factors.

#:

Comparison of Drivers of Per Person On Island Expenditure, Oct, Nov, Dec 2009, Jan, Feb, Mar 2010, Overall Oct 2009 - Mar 2010

	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Combined Oct 2009 - Mar 2010
Independent Variables:	rank	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%	0.0%	0.09%

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 March 2010 Period.