



**GUAM VISITORS BUREAU**  
**Japan Visitor Tracker Exit Profile**  
**FY2011 MARKET SEGMENTATION –**  
**MAY 2011**



**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.

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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

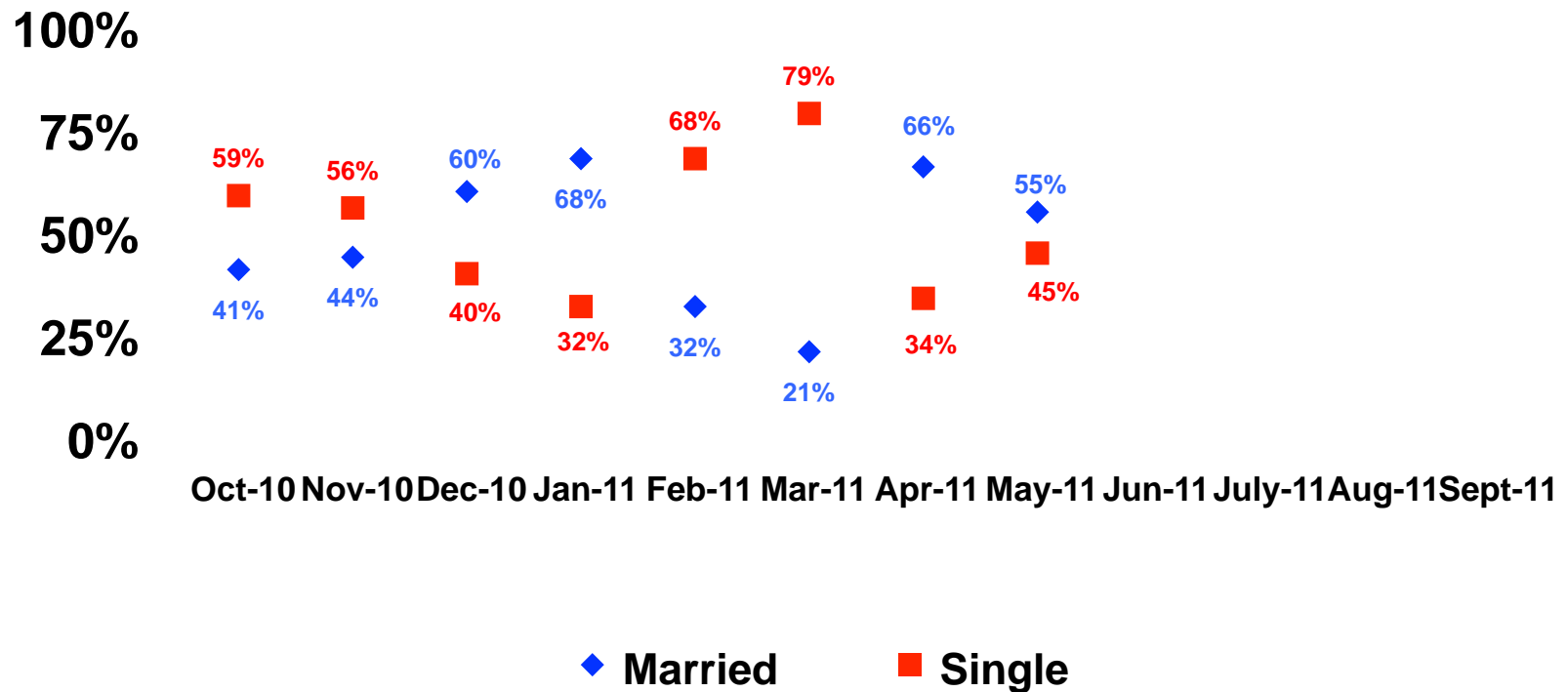
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

# Highlighted Segments

	Oct 10	Nov 10	Dec 10	Jan 11	Feb 11	Mar 11	Apr 11	May 11	Jun 11	July 11	Aug 11	Sept 11
<b>Families</b>	23%	19%	23%	46%	16%	13%	46%	29%				
<b>Repeaters</b>	38%	39%	42%	56%	29%	22%	47%	45%				
<b>Shoppers</b>	58%	62%	57%	58%	64%	61%	64%	70%				
<b>Seniors</b>	9%	8%	16%	10%	8%	8%	12%	11%				
<b>OL/Salary-woman</b>	18%	14%	16%	10%	10%	3%	7%	17%				
<b>Group Travelers</b>	6%	3%	6%	2%	5%	6%	2%	2%				
<b>Students</b>	13%	13%	6%	8%	33%	65%	18%	2%				
<b>Golfers</b>	4%	4%	4%	8%	6%	7%	4%	5%				
<b>Wedding</b>	6%	5%	11%	2%	4%	3%	6%	5%				
<b>Divers</b>	9%	10%	8%	9%	10%	12%	11%	10%				
<b>Honey-mooner</b>	5%	5%	8%	3%	3%	1%	4%	6%				
<b>TOTAL</b>	<b>329</b>	<b>329</b>	<b>329</b>	<b>328</b>	<b>328</b>	<b>328</b>	<b>325</b>	<b>327</b>				

# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status Tracking

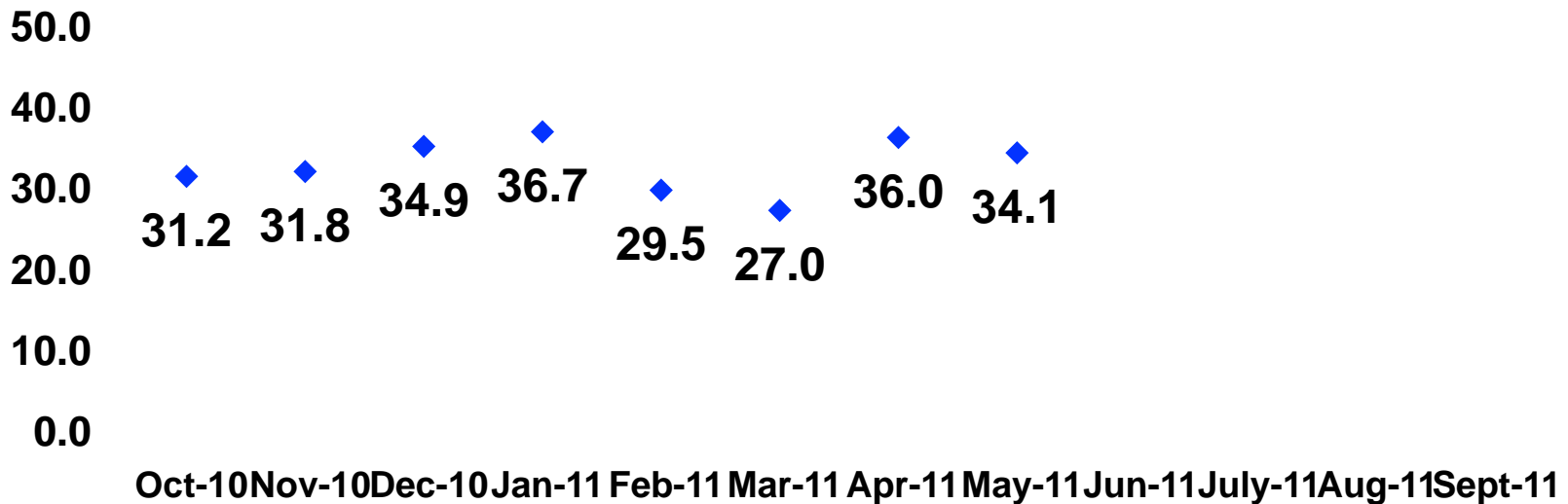


# Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
C. Married	Count		178	74	97	121	16	3		12	13	18	14	35
	Col %		55%	80%	66%	53%	29%	50%		80%	87%	100%	42%	97%
Single	Count		148	19	50	106	39	3	5	3	2		19	1
	Col %		45%	20%	34%	47%	71%	50%	100%	20%	13%		58%	3%
Total	Count		326	93	147	227	55	6	5	15	15	18	33	36



# Average Age Tracking



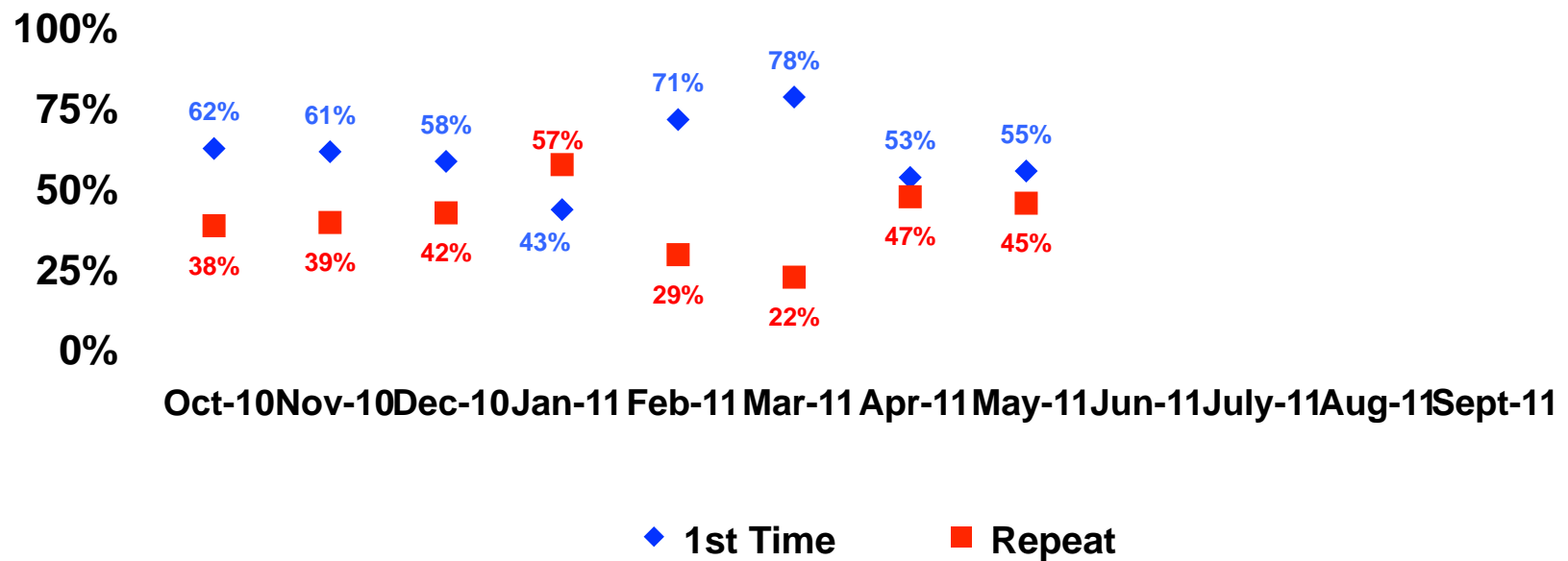
# Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	190	29	62	134	43	4	5	4	8	14	25	
		Col %	58%	31%	42%	59%	78%	67%	100%	27%	53%	78%	74%	
	35-54	Count	120	58	76	82	11	2		8	2	4	8	19
		Col %	37%	62%	51%	36%	20%	33%		53%	13%	22%	24%	53%
	55+	Count	17	7	10	12	1			3	5		1	17
		Col %	5%	7%	7%	5%	2%			20%	33%		3%	47%
Total	Count		327	94	148	228	55	6	5	15	15	18	34	36
D.	Mean		34.1	38.9	37.1	34.0	30.3	33.7	20.6	41.9	40.5	29.3	30.9	55.1
	Median		32	38	37	32	27	32	21	39	30	27	28	53

# Income Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR	
Q.31	Less than Y2 million	Count Col %	1 4%	4 3%	8 4%	3 6%	1 17%					1 3%		
	Y2,000,001 - Y3,000,000	Count Col %	3 11%	11 4%	24 12%	13 25%	1 17%		1 8%	1 7%	1 6%	4 14%	1 3%	
	Y3,000,001 - Y4,000,000	Count Col %	54 18%	8 10%	16 12%	35 17%	11 21%	1 17%	2 15%	2 14%	7 41%	8 28%		
	Y4,000,001 - Y5,000,000	Count Col %	50 17%	9 11%	17 13%	36 17%	9 17%	1 17%	1 8%	4 29%	8 47%	3 10%	2 6%	
	Y5,000,000 - Y7,000,000	Count Col %	51 17%	16 20%	27 21%	33 16%	7 13%		3 23%	3 21%		3 10%	6 17%	
	Y7,000,001 - Y10,000,000	Count Col %	41 14%	18 23%	23 18%	25 12%	4 8%	1 17%	2 67%	4 31%	2 14%	1 6%	5 17%	14 40%
	Y10,000,001 or more	Count Col %	54 18%	24 30%	33 25%	45 22%	5 10%	1 17%	1 33%	2 15%	2 14%	5 17%	12 34%	
	No Income	Count Col %	1 0%	1 1%										
Total	Count		296	80	131	206	52	6	3	13	14	17	29	35

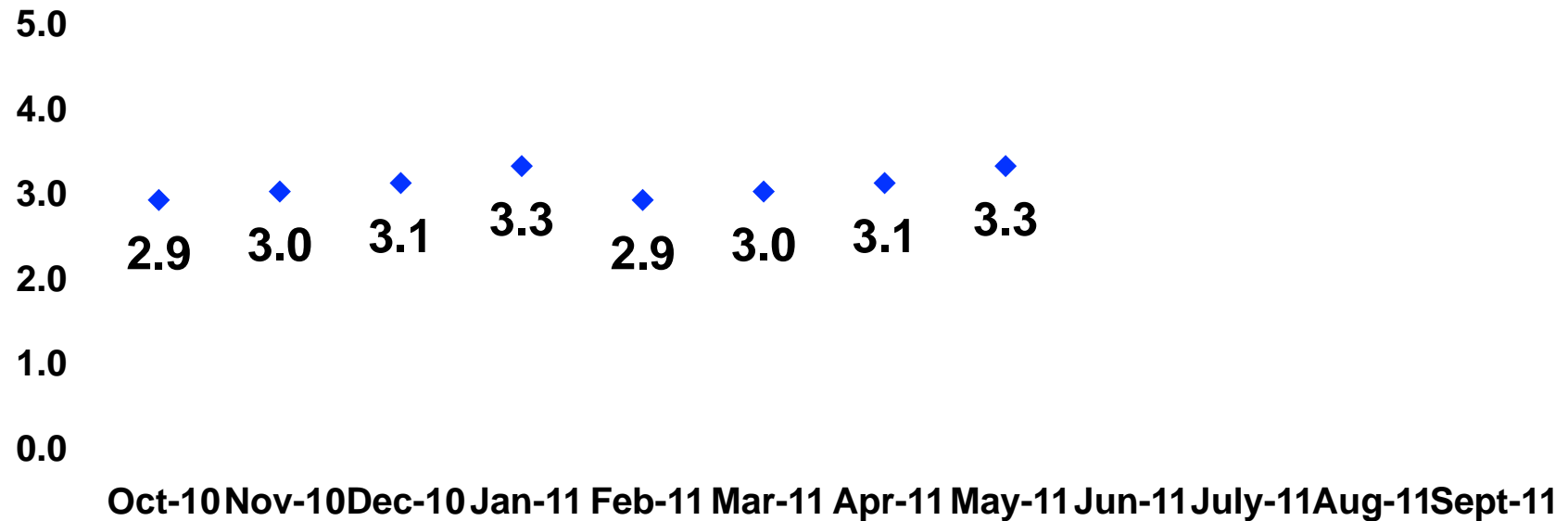
# Prior Trips to Guam Tracking



# Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		179	41		124	33	4	3	5	10	13	21	14
	Col %		55%	44%		54%	60%	67%	60%	33%	67%	72%	62%	39%
No	Count		148	53	148	104	22	2	2	10	5	5	13	22
	Col %		45%	56%	100%	46%	40%	33%	40%	67%	33%	28%	38%	61%
Total	Count		327	94	148	228	55	6	5	15	15	18	34	36

# 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	3.4	3.3	3.2	3.2	3.7	3.0	3.6	3.2	3.5	3.1	3.4
Median	3	3	3	3	3	4	3	4	3	4	3	3
Minimum	2	2	2	2	2	3	3	3	2	2	2	2
Maximum	8	8	8	5	5	4	3	4	4	5	4	4

# 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	57	20	31	38	12		1	3	7	6	2	7
		Col %	18%	21%	21%	17%	22%		20%	20%	47%	33%	6%	19%
	Free-time package tours	Count	231	58	94	166	39		3	10	8	11	24	22
		Col %	71%	62%	64%	73%	72%		60%	67%	53%	61%	73%	51%
	Individually arranged travel	Count	29	14	21	18			1	2		1	5	5
		Col %	9%	15%	14%	8%			20%	13%		6%	15%	14%
	Group tour	Count	6	2	2	4	3	6					1	1
		Col %	2%	2%	1%	2%	6%	100%					3%	3%
	Other	Count	2			1							1	1
		Col %	1%			0%							3%	3%
Total	Count		325	94	148	227	54	6	5	15	15	18	33	36

# Travel Motivation Segmentation

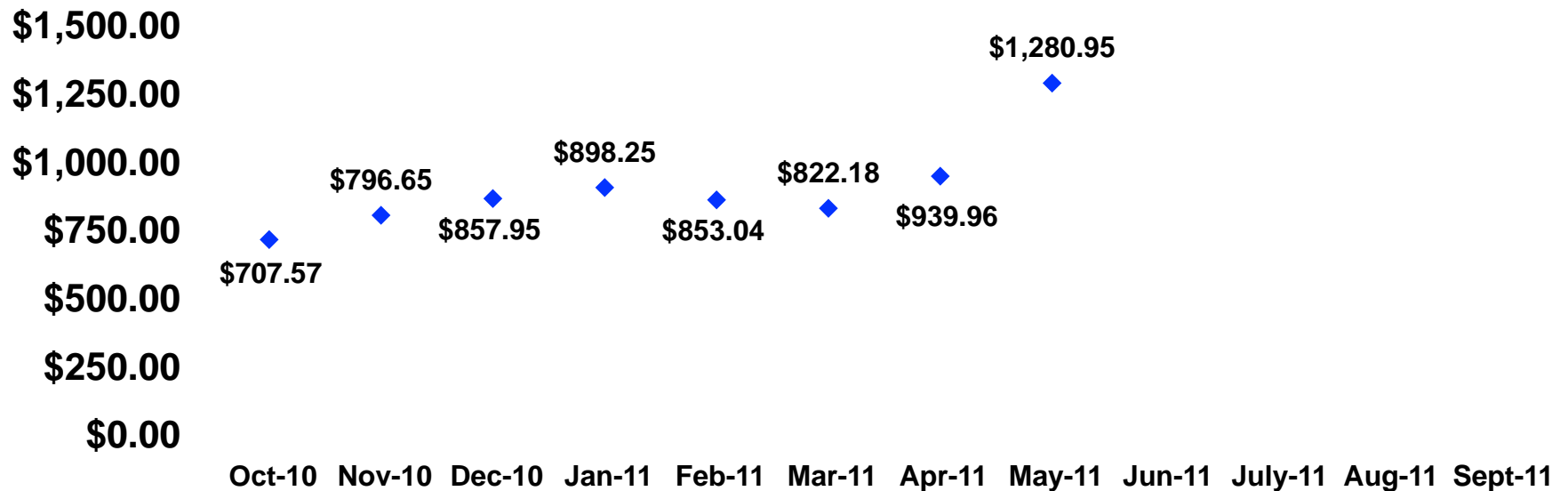
	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Beautiful seas, beaches, tropical climate	57%	57%	64%	56%	60%	67%	40%	40%	13%	50%	56%	56%
Short travel time	45%	51%	48%	46%	47%	50%	20%	73%	7%	28%	38%	39%
Pleasure	45%	45%	45%	49%	45%	17%	60%	53%	13%	28%	32%	33%
A previous visit	37%	48%	81%	36%	31%	33%	40%	53%	13%	28%	32%	47%
Just to relax	43%	41%	49%	43%	51%	17%	40%	33%	7%	11%	38%	39%
Shopping	35%	37%	37%	38%	45%	17%	20%	7%	20%	33%	18%	22%
Price of the tour package	30%	24%	30%	30%	35%		20%	60%		6%	24%	31%
Water sports	23%	21%	24%	19%	24%			33%		6%	32%	22%
It is a safe place to spend a vacation	20%	31%	26%	21%	11%	17%		7%	13%	17%	9%	28%
Recommendation of friend, relative, travel agency	15%	6%	11%	18%	24%	33%	20%			17%	12%	6%
To get married or Attend wedding	5%	11%	3%	5%	5%				100%	11%	3%	14%
Honeymoon	6%	2%	3%	6%	2%				13%	100%		
SCUBA diving	4%	3%	3%	4%	5%		20%	7%			26%	
To golf	4%	2%	5%	3%				53%			3%	6%
Other	3%	7%	3%	4%	2%							3%
Promotional materials from GVB	2%	3%	3%	2%				7%			3%	3%
Organized Sporting Activity	2%	2%	2%	2%	2%			7%			6%	
Company or Business trip	2%	1%	1%	1%		33%					3%	
To visit friends or relatives	1%		1%	1%	2%							
Career certification or testing	1%		1%	0%								
Special promotion	0%		1%	0%								3%
Total Cases	327	94	148	228	55	6	5	15	15	18	34	36

# Information Sources Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1 Internet	72%	71%	76%	72%	76%	67%	80%	87%	53%	50%	82%	67%
Travel guide book at bookstores	65%	60%	63%	63%	82%	33%	40%	60%	60%	56%	68%	58%
I have been to Guam before	45%	56%	100%	46%	40%	33%	40%	67%	33%	28%	38%	61%
Travel agent brochure	38%	30%	29%	38%	27%	33%	40%	47%	40%	72%	21%	33%
Magazine	18%	23%	20%	18%	18%	50%		27%	20%	17%	12%	22%
Friend or relative	17%	13%	7%	18%	25%	17%	20%		13%	17%	15%	3%
TV	5%	4%	5%	6%	4%				7%	6%		17%
Company travel department	6%	1%	3%	7%	13%			13%			3%	3%
Newspaper	2%	3%	1%	3%	2%							14%
GVB office	1%		1%	1%						6%		
GVB promotional activities	0%		1%									
Total Cases	326	94	148	227	55	6	5	15	15	18	34	36

# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures Tracking

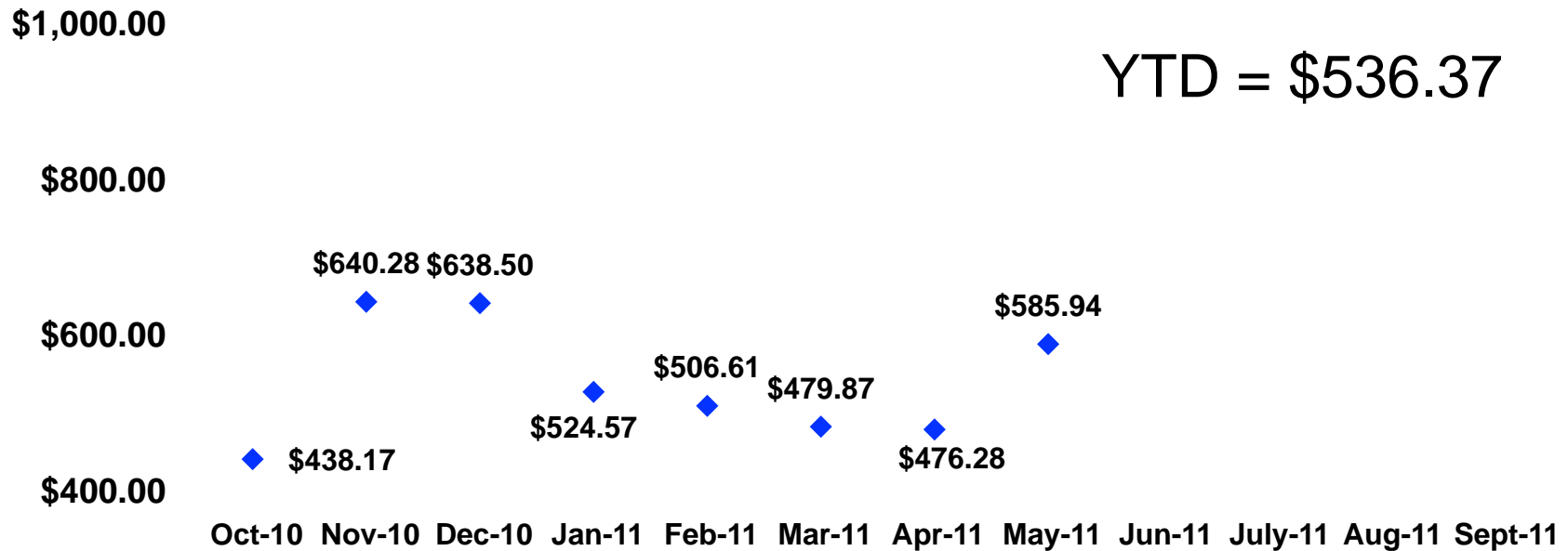


YTD=\$894.28

# Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid per person converted to \$	Mean	\$1,280.95	\$1,186.26	\$1,159.91	\$1,264.68	\$1,193.71	\$949.08	\$1,064.62	\$863.97	\$1,785.70	\$1,988.71	\$1,168.29	\$1,195.97
	Median	\$1,176	\$1,135	\$1,019	\$1,155	\$1,114	\$990	\$0	\$867	\$1,651	\$1,702	\$1,145	\$1,003
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$804.65	\$0.00	\$0.00
	Maximum	\$5,570.69	\$3,713.79	\$3,183.25	\$5,570.69	\$3,094.83	\$1,856.90	\$3,094.83	\$3,094.83	\$3,713.79	\$3,713.79	\$2,475.86	\$3,136.92

# On-Island Expenditures Tracking



# On-Island Expenditures Per Person Segmentation

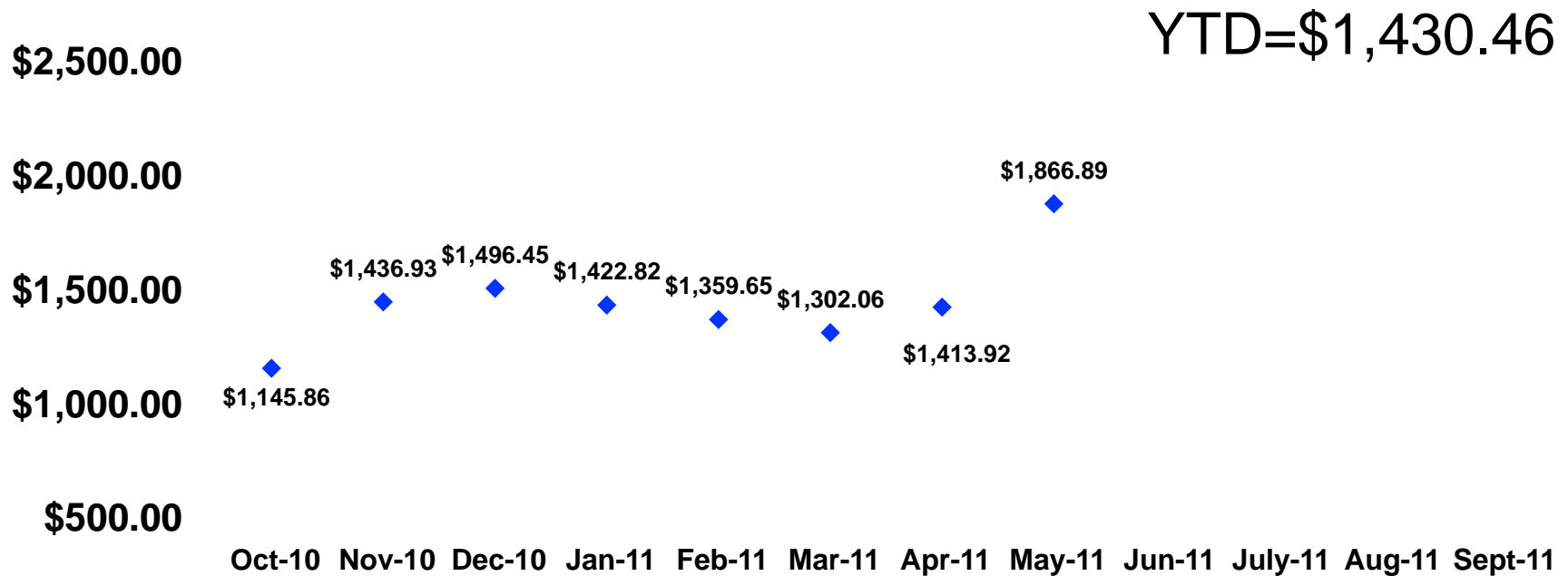
		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$585.94	\$419.87	\$561.67	\$602.49	\$786.33	\$555.83	\$389.33	\$544.67	\$559.51	\$591.39	\$585.56	\$433.36
	Median	\$482	\$323	\$448	\$500	\$500	\$575	\$337	\$550	\$400	\$500	\$500	\$363
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$200.00	\$0.00	\$0.00	\$0.00	\$150.00	\$0.00	\$0.00
	Maximum	\$5,452.00	\$2,166.67	\$3,500.00	\$5,452.00	\$5,452.00	\$1,000.00	\$1,200.00	\$1,400.00	\$3,500.00	\$1,800.00	\$1,560.00	\$1,550.00



# On-Island Expense Breakdown Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$51.84	\$88.88	\$72.37	\$51.75	\$23.51	\$85.00	\$0.00	\$106.67	\$38.67	\$28.06	\$58.09	\$73.25
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$30.00	\$0.00	\$100.00	\$0.00	\$0.00	\$5.00	\$0.00
F&B-FF REST/CONV	Mean	\$34.00	\$39.47	\$42.80	\$34.37	\$21.35	\$50.00	\$13.40	\$39.67	\$19.00	\$55.00	\$42.35	\$35.67
	Median	\$10.00	\$0.00	\$20.00	\$10.00	\$7.00	\$50.00	\$7.00	\$20.00	\$0.00	\$10.00	\$20.00	\$17.50
F&B-OUT- SIDE HOTEL/ REST	Mean	\$87.72	\$81.82	\$106.25	\$82.46	\$70.09	\$30.00	\$72.00	\$201.33	\$45.67	\$63.89	\$90.59	\$81.36
	Median	\$30.00	\$0.00	\$40.00	\$40.00	\$40.00	\$0.00	\$0.00	\$150.00	\$0.00	\$10.00	\$100.00	\$0.00
OPTIONAL TOUR	Mean	\$116.00	\$111.97	\$118.14	\$104.82	\$139.00	\$153.33	\$34.00	\$416.00	\$64.40	\$57.22	\$193.68	\$103.19
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$70.00	\$100.00	\$0.00	\$300.00	\$0.00	\$0.00	\$130.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$313.31	\$313.72	\$408.11	\$344.46	\$346.55	\$166.67	\$130.00	\$376.67	\$261.20	\$359.39	\$238.94	\$183.33
	Median	\$50.00	\$0.00	\$100.00	\$100.00	\$50.00	\$0.00	\$0.00	\$100.00	\$0.00	\$100.00	\$50.00	\$0.00
GIFT/SOUV- F&F AT HOME	Mean	\$120.11	\$128.41	\$124.00	\$125.98	\$114.09	\$173.33	\$50.00	\$68.00	\$102.80	\$143.33	\$132.50	\$220.44
	Median	\$50.00	\$0.00	\$36.00	\$50.00	\$50.00	\$115.00	\$0.00	\$50.00	\$0.00	\$0.00	\$100.00	\$65.00
LOCAL TRANS	Mean	\$18.83	\$26.47	\$27.43	\$18.43	\$8.45	\$11.67	\$3.00	\$42.00	\$1.33	\$12.94	\$39.00	\$27.03
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8.00	\$0.00
OTHER EXP	Mean	\$309.55	\$489.43	\$266.14	\$307.04	\$185.69	\$0.00	\$221.60	\$97.00	\$400.00	\$462.94	\$212.65	\$257.78
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$70.00	\$0.00	\$200.00	\$435.00	\$0.00	\$13.00

# Total Expenditures Tracking



# Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Total	Mean	\$1,866.89	\$1,606.12	\$1,721.58	\$1,867.17	\$1,980.04	\$1,504.91	\$1,453.95	\$1,408.64	\$2,345.21	\$2,580.10	\$1,753.85	\$1,629.33
per	Median	\$1,735.52	\$1,586.97	\$1,580.16	\$1,717.74	\$1,980.69	\$1,640.34	\$340.00	\$1,377.76	\$2,356.90	\$2,624.14	\$1,599.86	\$1,533.97
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$200.00	\$0.00	\$0.00	\$150.00	\$975.29	\$0.00	\$0.00
expense	Maximum	\$6,417.59	\$4,213.79	\$4,490.34	\$6,417.59	\$6,417.59	\$2,541.90	\$3,431.49	\$3,594.83	\$4,490.34	\$4,213.79	\$3,480.69	\$4,136.92

**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 2010, Jan, Feb, Mar, Apr, May 2011, Overall Oct 2010 - May 2011**

	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Combined Oct 2010 - May 2011
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	2		2	3	1	4	3	<b>3</b>	3
Ease of getting around									
Safety walking around at night		3	4						
Quality of daytime tours									4
Variety of daytime tours					3	2			
Quality of nighttime tours									
Variety of nighttime tours									
Quality of shopping		2	1			3		<b>1</b>	1
Variety of shopping	3			2	2				5
Price of things on Guam	1		3				1		6
Quality of hotel accommodations		1		1		1	2	<b>2</b>	2
% of Overall Satisfaction Accounted For	36.7%	36.0%	53.0%	41.1%	38.6%	57.6%	45.5%	<b>38.5%</b>	42.9%

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 May 2011 Period. By rank order they are:
  - **Quality of shopping,**
  - **Quality of hotel accommodations, and**
  - **Cleanliness of beaches & parks**
- With all three factors the overall  $r^2$  is .385 meaning that **38.5% of overall satisfaction is accounted for by these three factors.**

!!

**Comparison of Drivers of Per Person On Island Expenditure, Oct, Nov, Dec 2010, Jan, Feb, Mar, Apr, May 2011, Overall Oct 2010 - May 2011**

	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	<b>May-11</b>	Combined Oct 2010 - May 2011
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	<b>rank</b>	rank
Cleanliness of beaches & parks					1				2
Ease of getting around									
Safety walking around at night									4
Quality of daytime tours									
Variety of daytime tours									
Quality of nighttime tours									
Variety of nighttime tours								<b>2</b>	3
Quality of shopping	1								
Variety of shopping			1					<b>1</b>	1
Price of things on Guam					2	1			
Quality of hotel accommodations									
% of Overall Satisfaction Accounted For	4.0%	0.0%	2.2%	0.0%	0.9%	3.2%	0.0%	<b>4.8%</b>	2.00%

NOTE: Only significant variables are ranked.



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# Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** of Japanese visitors on Guam is driven by two significant factors in the May 2011 Period. By rank order they are:
  - **Variety of shopping, and**
  - **Variety of night time tours.**
- With these two factors the overall  $r^2$  is .048 meaning that **4.8% of per person on island expenditure is accounted for by these two factors.**