



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

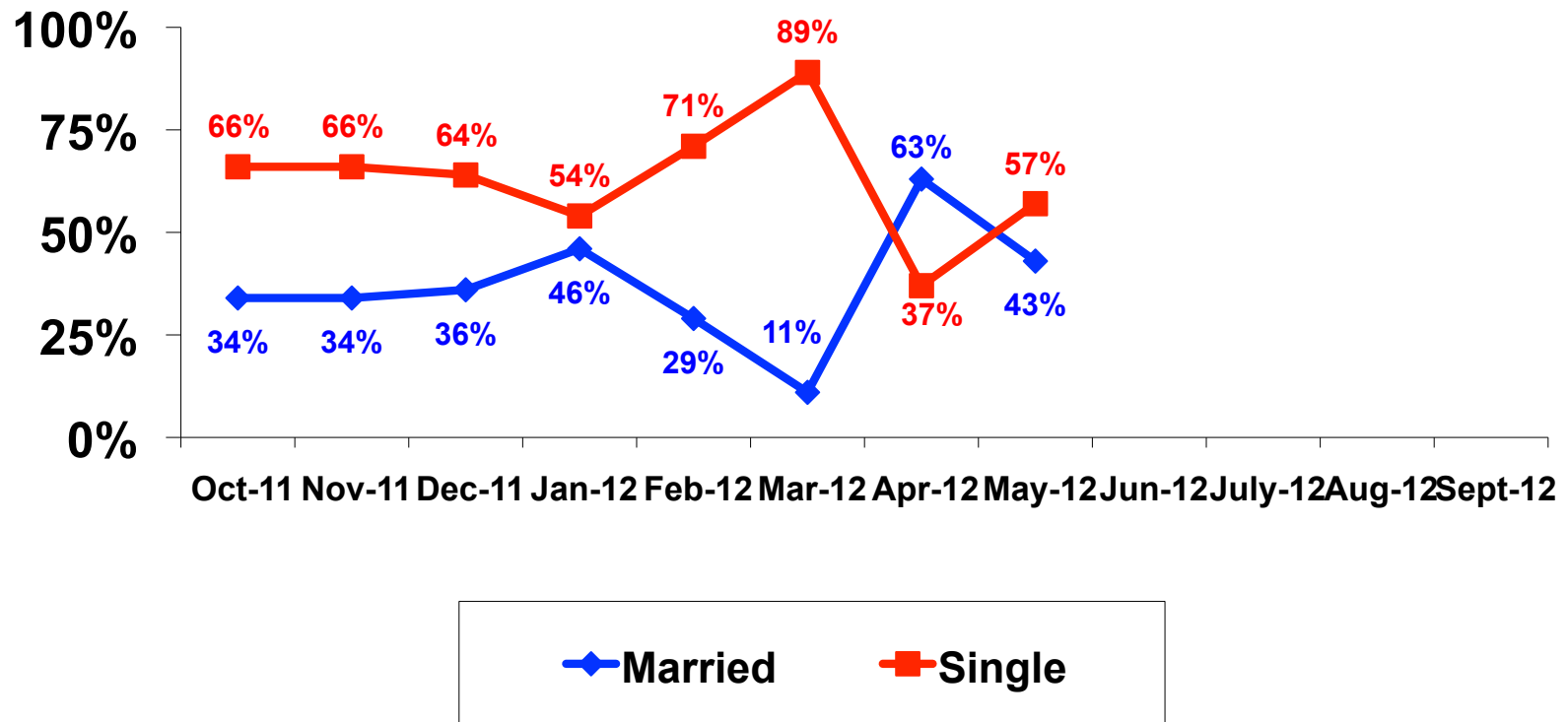
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.18/Q.19/Q.28
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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

SECTION 1
PROFILE OF RESPONDENTS

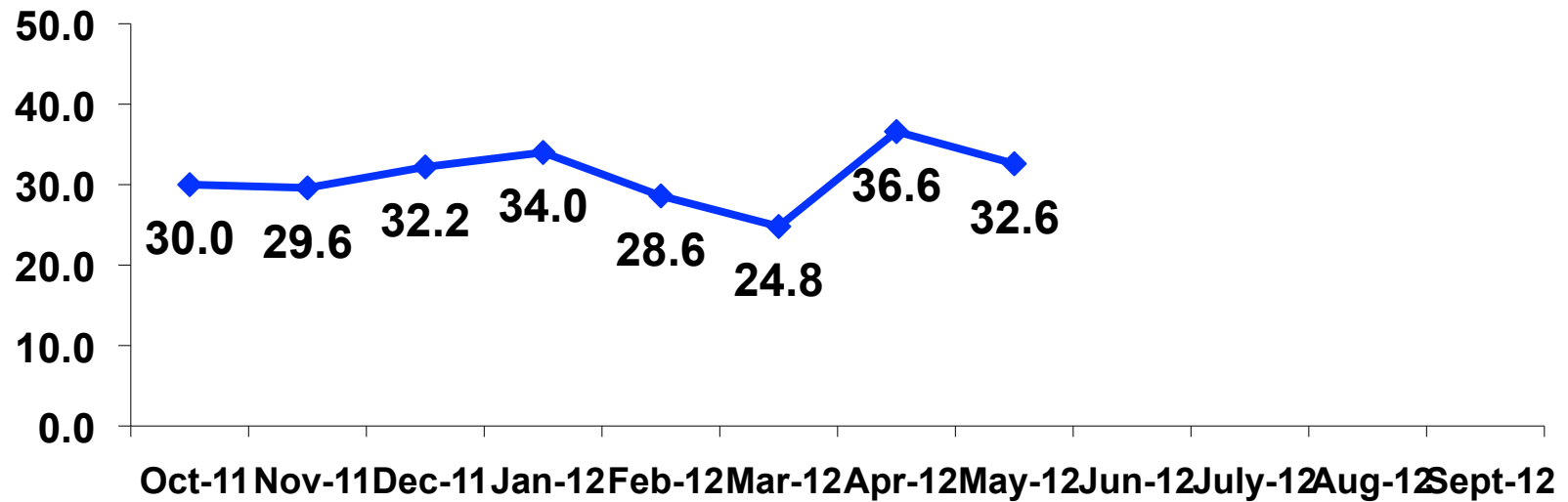
Marital Status Tracking



Marital Status Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
C. Married	Count		140	54	10	4	15	11	80	64	55	32	13	68
	Col %		43%	64%	20%	57%	100%	48%	40%	28%	74%	97%	93%	54%
Single	Count		187	31	40	3		12	119	168	19	1	1	57
	Col %		57%	36%	80%	43%		52%	60%	72%	26%	3%	7%	46%
Total	Count		327	85	50	7	15	23	199	232	74	33	14	125

Average Age Tracking



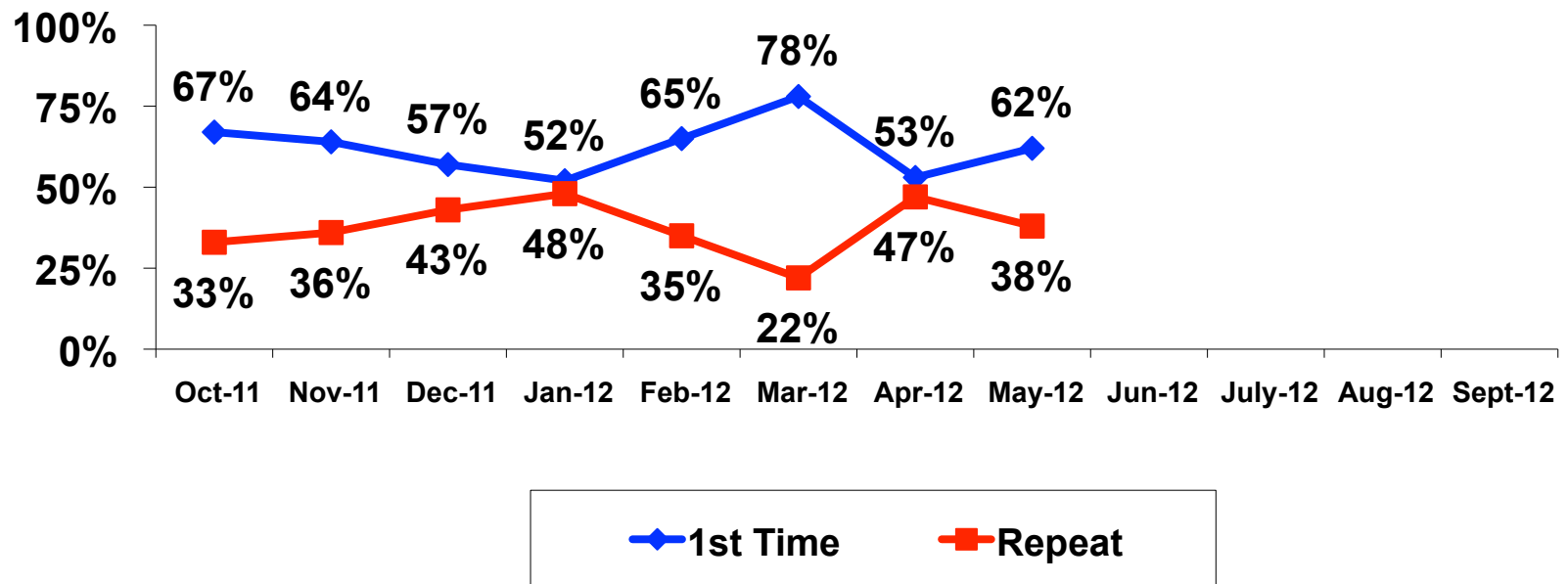
Age Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
D.	18-34	Count	226	32	39	4		15	148	226		6	13	68
		Col %	69%	38%	78%	57%		65%	74%	97%		18%	93%	54%
	35-54	Count	79	44	11	1		5	43	6	73	24	1	47
		Col %	24%	52%	22%	14%		22%	22%	3%	99%	73%	7%	38%
	55+	Count	21	9		2	15	3	8		1	3		10
		Col %	6%	11%		29%	100%	13%	4%		1%	9%		8%
Total	Count		326	85	50	7	15	23	199	232	74	33	14	125
D.	Mean		32.6	38.1	29.8	42.9	63.9	34.5	31.0	27.1	41.9	41.1	27.7	35.1
	Median		29	37	28	34	63	31	28	27	41	40	28	31

Income Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.31	Less than Y2	Count	9	1	1				6	9			2	1
	million	Col %	3%	1%	3%				3%	5%			14%	1%
	Y2,000,001 -	Count	29	7	5	1	3	4	20	25	1	2	3	3
	Y3,000,000	Col %	10%	9%	13%	14%	20%	18%	12%	13%	1%	6%	21%	3%
	Y3,000,001 -	Count	51	5	12	4		3	33	45	6	1	3	14
	Y4,000,000	Col %	18%	7%	30%	57%		14%	19%	23%	9%	3%	21%	12%
	Y4,000,001 -	Count	43	6	3	1	3	3	22	35	5	4	1	20
	Y5,000,000	Col %	15%	8%	8%	14%	20%	14%	13%	18%	7%	13%	7%	17%
	Y5,000,00 -	Count	62	21	7		1	7	39	43	16	8	3	28
	Y7,000,000	Col %	22%	28%	18%		7%	32%	23%	22%	23%	26%	21%	24%
	Y7,000,001 -	Count	45	15	4	1	3	1	25	20	20	10		25
	Y10,000,000	Col %	16%	20%	10%	14%	20%	5%	15%	10%	29%	32%		22%
	Y10,000,001	Count	47	21	8		5	3	26	19	22	6	2	24
	or more	Col %	16%	28%	20%		33%	14%	15%	10%	31%	19%	14%	21%
	No Income	Count	1					1	1	1				
		Col %	0%					5%	1%	1%				
Total	Count		287	76	40	7	15	22	172	197	70	31	14	115

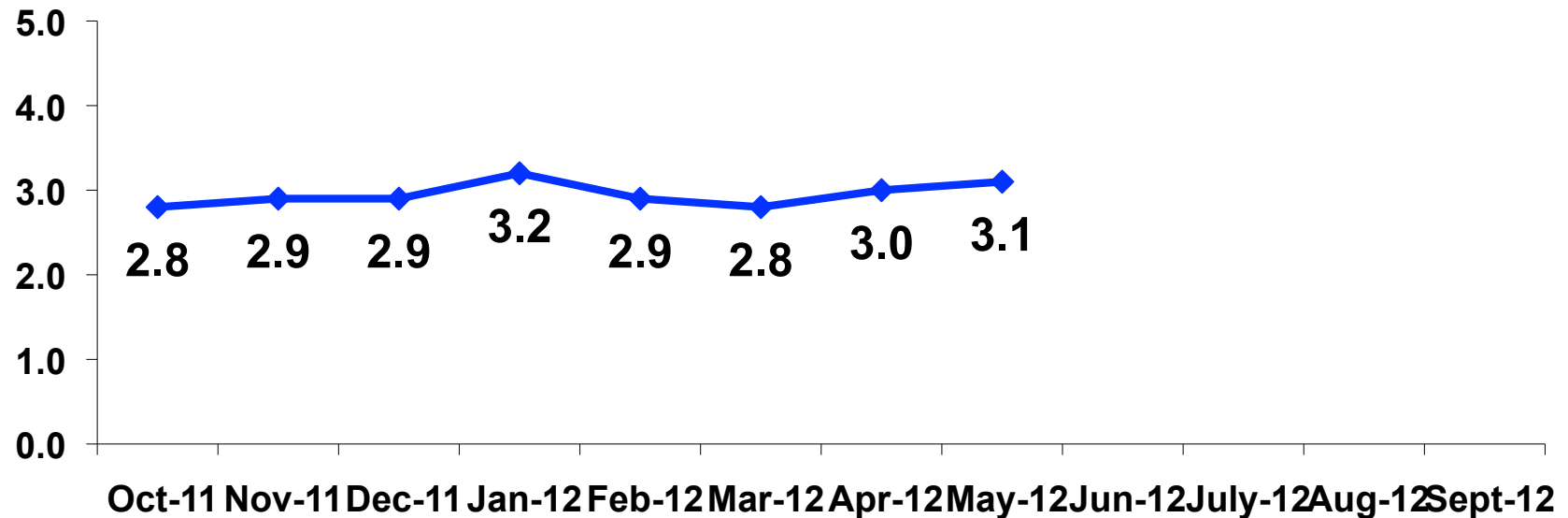
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.3A	Yes	Count	202	44	26	4	9	13	130	160	30	11	12	
		Col %	62%	52%	52%	57%	60%	57%	65%	69%	41%	33%	86%	
	No	Count	125	41	24	3	6	10	69	72	44	22	2	125
		Col %	38%	48%	48%	43%	40%	43%	35%	31%	59%	67%	14%	100%
Total		Count	327	85	50	7	15	23	199	232	74	33	14	125

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	3.1	3.2	3.1	3.1	3.1	3.1	3.2	3.1	3.4	3.3	3.3	3.3
Median	3	3	3	3	3	3	3	3	3	3	3	3
Minimum	2	2	2	3	2	2	2	2	2	2	3	2
Maximum	7	7	7	4	4	4	7	6	7	7	5	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	67	26	10	4	9	41	51	11	7	6	18	
		Col %	21%	31%	20%	27%	41%	21%	22%	15%	22%	43%	15%	
	Free-time package tours	Count	233	52	31	7	11	146	163	58	23	8	91	
		Col %	72%	62%	62%	47%	50%	74%	71%	78%	72%	57%	73%	
	Individually arranged travel	Count	18	4	5	2		8	12	4	1		12	
		Col %	6%	5%	10%	13%		4%	5%	5%	3%		10%	
	Group tour	Count	7	2	4	7	2	2	4	1	1		3	
		Col %	2%	2%	8%	100%	13%	9%	1%	2%	3%		2%	
Total	Count		325	84	50	7	15	22	197	230	74	32	14	124

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	58%	55%	58%	29%	60%	22%	64%	58%	62%	58%	50%	54%
Pleasure	47%	44%	42%		47%	17%	52%	45%	51%	45%	29%	46%
Short travel time	44%	39%	40%	29%	40%	17%	44%	40%	54%	42%	14%	54%
Just to relax	43%	34%	32%		47%	13%	42%	41%	45%	45%	21%	45%
A previous visit	27%	35%	38%	43%	27%	43%	23%	20%	49%	48%	7%	70%
Shopping	32%	39%	34%		40%	22%	34%	33%	26%	36%	29%	33%
Price of the tour package	29%	31%	20%		27%	13%	25%	25%	41%	24%	7%	28%
Water sports	25%	21%	26%		13%	9%	41%	26%	24%	27%	14%	22%
Recommendation of friend, relative, travel agency	17%	8%	28%	29%	27%		19%	20%	5%	9%		8%
It is a safe place to spend a vacation	14%	21%	14%	14%	20%	4%	13%	11%	23%	30%	14%	22%
To get married or Attend wedding	7%	16%	4%	29%	13%	100%	6%	7%	7%	9%	7%	8%
Honeymoon	4%	4%	2%			4%	4%	6%			100%	2%
SCUBA diving	4%	1%	2%				6%	4%	3%	3%	7%	4%
To visit friends or relatives	2%	2%	2%	14%	7%	4%	1%	2%	1%			6%
Company or Business trip	2%	4%	4%	29%			2%	2%	3%		7%	2%
Other	2%	4%	4%				2%	1%	4%	3%		2%
To golf	2%	1%					3%	2%	1%			2%
Organized Sporting Activity	1%						2%	1%	1%	3%		2%
Career certification or testing	1%		2%					1%				1%
Total Cases	326	85	50	7	15	23	198	231	74	33	14	125

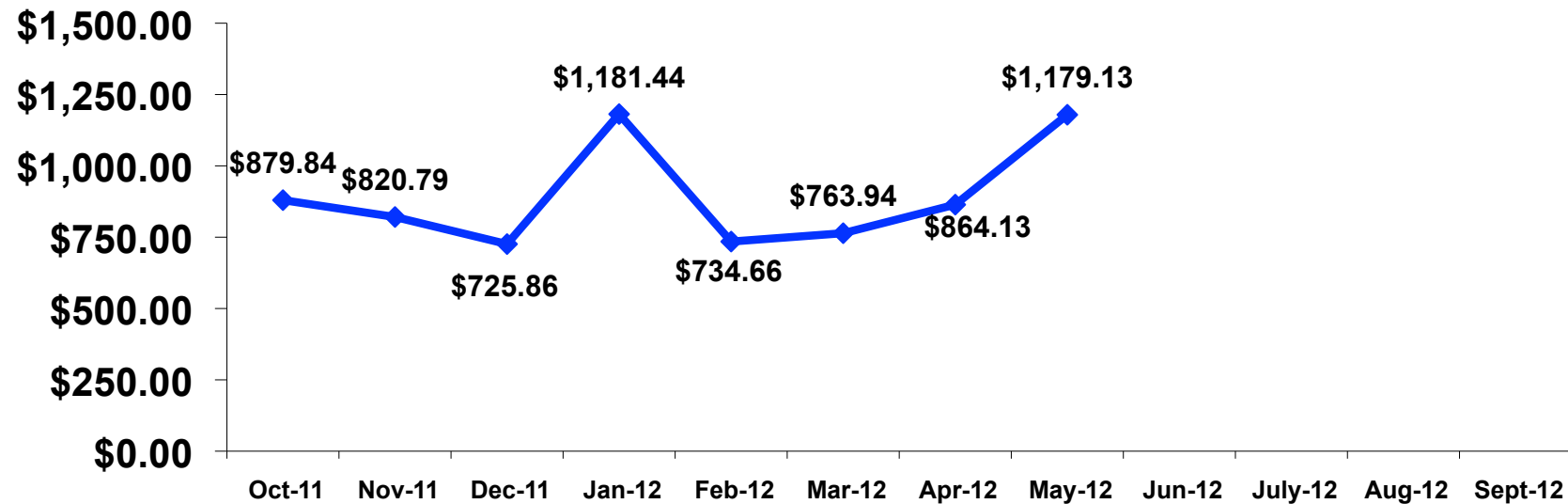
Information Sources Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT	
Q.1													
Travel guide book at bookstores	69%	70%	69%	71%	87%	78%	72%	70%	67%	65%	79%	50%	
Internet	66%	65%	65%	43%	40%	57%	69%	67%	68%	65%	50%	59%	
I have been to Guam before	31%	43%	43%	43%	27%	43%	28%	24%	53%	65%	7%	31%	
Travel agent brochure	37%	33%	37%	14%	33%	39%	40%	40%	23%	32%	71%	33%	
Magazine	19%	16%	22%	14%	20%	26%	21%	21%	11%	6%	29%	13%	
Friend or relative	18%	11%	12%	14%	13%	17%	21%	24%	4%	6%	29%	12%	
Company travel department	5%	1%	10%				7%	7%	3%		7%	2%	
TV	4%	7%	4%		27%	4%	3%	4%	1%	3%	7%	4%	
Newspaper	2%	1%			7%		1%	1%	3%			1%	
GVB office	1%	1%	2%				1%	0%	1%		7%		
GVB promotional activities	1%							1%				1%	
Total	Cases	319	83	49	7	15	23	195	225	73	31	14	123

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

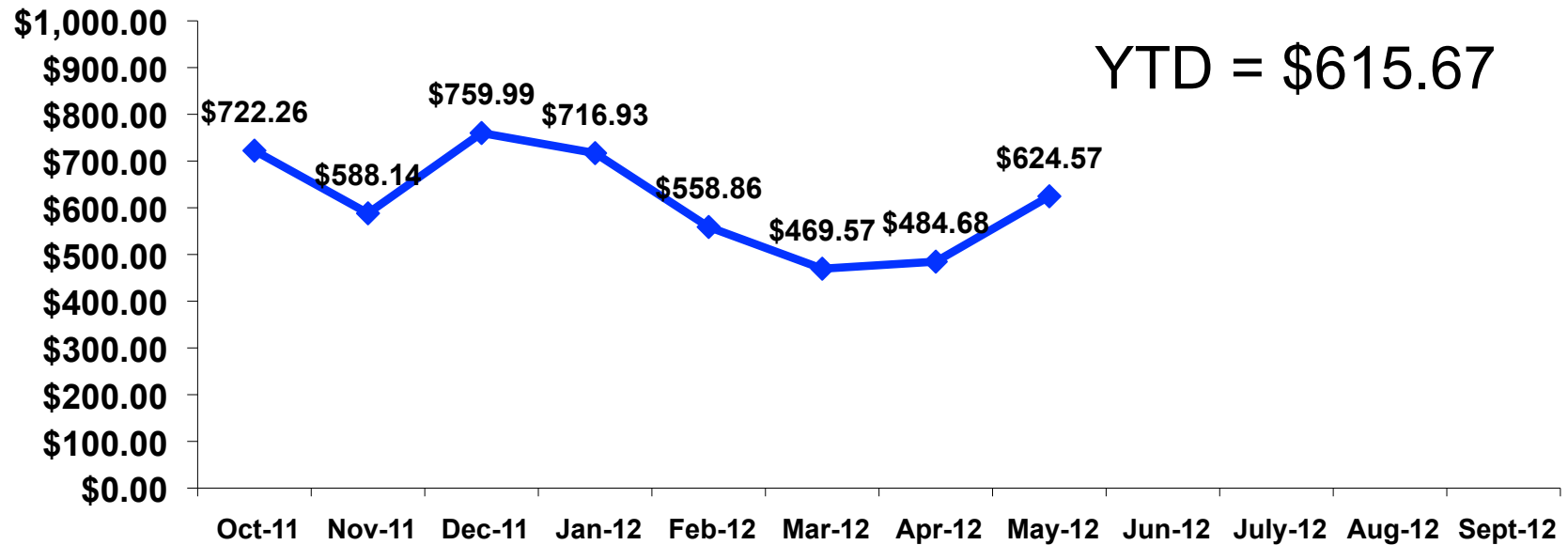
YTD=\$893.75



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Prepaid	Mean	\$1,179.13	\$1,204.94	\$1,130.91	\$969.05	\$1,118.64	\$1,113.49	\$1,224.20	\$1,148.80	\$1,226.50	\$1,346.97	\$1,989.44	\$1,102.24
per	Median	\$1,126	\$1,168	\$1,251	\$626	\$1,251	\$951	\$1,197	\$1,063	\$1,147	\$1,197	\$1,626	\$1,043
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$938.32	\$0.00
converted to \$	Maximum	\$4,378.83	\$3,753.28	\$3,753.28	\$3,038.37	\$3,038.37	\$3,038.37	\$3,753.28	\$4,378.83	\$3,753.28	\$3,753.28	\$4,378.83	\$3,440.51

On-Island Expenditures Tracking



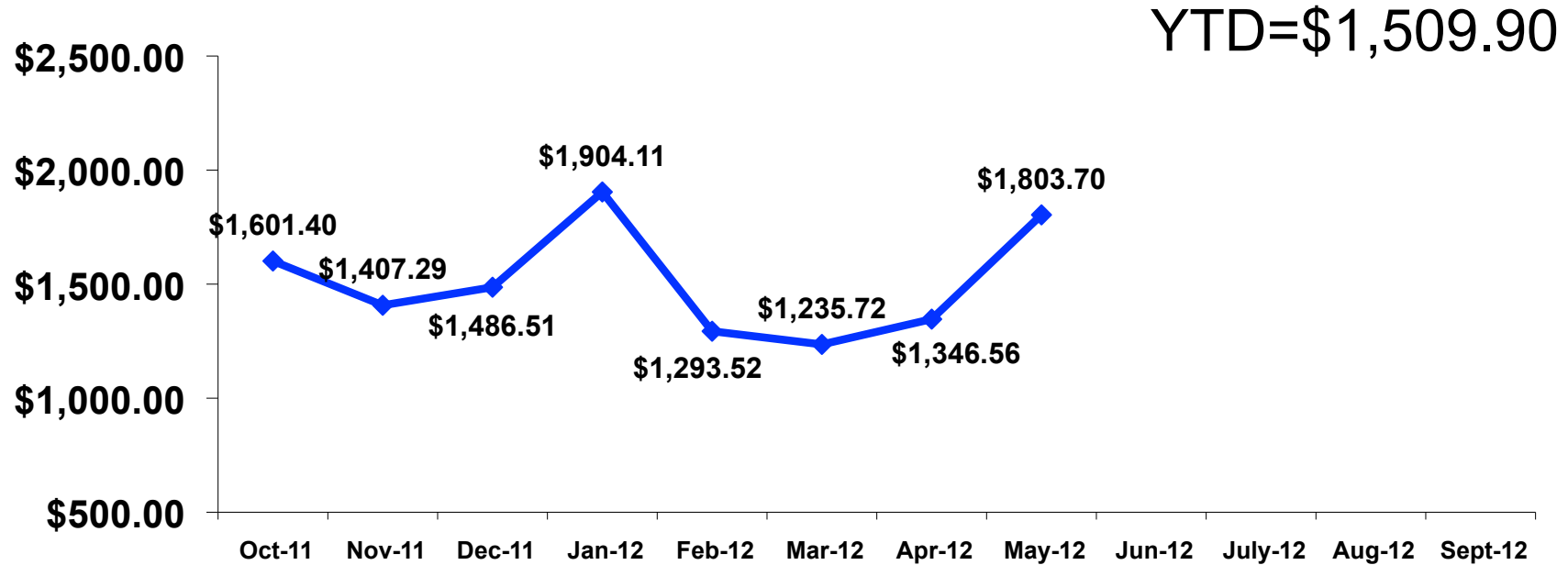
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Per person on-island exp	Mean	\$624.57	\$539.20	\$570.68	\$421.43	\$671.34	\$559.27	\$661.46	\$638.40	\$563.55	\$448.07	\$670.83	\$644.05
	Median	\$447	\$350	\$400	\$400	\$573	\$430	\$476	\$450	\$350	\$333	\$500	\$500
	Minimum	\$0.00	\$2.00	\$100.00	\$200.00	\$64.29	\$64.29	\$0.00	\$0.00	\$0.00	\$64.29	\$165.00	\$0.00
	Maximum	\$6,000.00	\$2,400.00	\$2,100.00	\$1,000.00	\$1,705.00	\$1,800.00	\$6,000.00	\$6,000.00	\$2,950.00	\$1,250.00	\$1,666.67	\$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	\$34.16	\$55.59	\$14.76	\$4.29	\$28.51	\$45.09	\$31.10	\$26.38	\$58.99	\$51.24	\$22.21	\$46.17
	Median	\$0.00	\$7.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$38.27	\$57.48	\$39.98	\$111.43	\$30.00	\$31.74	\$36.31	\$32.61	\$60.26	\$90.45	\$37.29	\$46.60
	Median	\$10.00	\$20.00	\$7.00	\$10.00	\$10.00	\$5.00	\$10.00	\$10.00	\$20.00	\$30.00	\$20.00	\$20.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$103.82	\$119.28	\$61.12	\$137.14	\$129.67	\$67.39	\$113.60	\$90.28	\$139.73	\$166.06	\$100.86	\$123.67
	Median	\$50.00	\$50.00	\$30.00	\$30.00	\$35.00	\$0.00	\$50.00	\$30.00	\$95.00	\$130.00	\$5.00	\$60.00
OPTIONAL TOUR	Mean	\$114.74	\$154.60	\$124.66	\$172.86	\$312.33	\$105.65	\$147.93	\$94.45	\$137.19	\$235.76	\$122.00	\$101.89
	Median	\$0.00	\$0.00	\$10.00	\$100.00	\$25.00	\$0.00	\$80.00	\$0.00	\$0.00	\$100.00	\$50.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$316.77	\$393.69	\$371.52	\$282.86	\$594.00	\$296.09	\$321.13	\$242.21	\$483.14	\$496.88	\$327.14	\$395.38
	Median	\$100.00	\$112.00	\$100.00	\$80.00	\$180.00	\$150.00	\$90.00	\$60.00	\$100.00	\$200.00	\$40.00	\$100.00
GIFT/ SOUV- F&F AT HOME	Mean	\$134.80	\$205.65	\$118.30	\$90.00	\$138.00	\$220.87	\$146.44	\$119.51	\$172.05	\$221.21	\$110.00	\$160.89
	Median	\$60.00	\$100.00	\$40.00	\$100.00	\$50.00	\$20.00	\$100.00	\$55.00	\$100.00	\$100.00	\$0.00	\$100.00
LOCAL TRANS	Mean	\$26.59	\$33.76	\$24.42	\$8.57	\$50.40	\$10.61	\$22.87	\$19.24	\$45.24	\$53.00	\$10.36	\$42.90
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$16.00	\$0.00	\$0.00	\$0.00	\$15.00	\$30.00	\$0.00	\$8.00
OTHER EXP	Mean	\$198.73	\$267.38	\$163.48	\$0.00	\$84.42	\$218.30	\$202.36	\$202.37	\$210.70	\$196.52	\$616.57	\$181.42
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$306.00	\$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 per person expense	Mean	\$1,803.70	\$1,744.14	\$1,701.59	\$1,390.47	\$1,789.98	\$1,672.76	\$1,885.66	\$1,787.20	\$1,790.04	\$1,795.03	\$2,660.27	\$1,746.29
	Median	\$1,651.09	\$1,536.67	\$1,657.37	\$1,025.55	\$1,813.87	\$1,694.71	\$1,725.99	\$1,651.09	\$1,556.44	\$1,501.09	\$2,539.14	\$1,651.09
	Minimum	\$2.00	\$2.00	\$150.00	\$250.00	\$64.29	\$64.29	\$2.00	\$2.00	\$65.00	\$64.29	\$1,238.32	\$150.00
	Maximum	\$7,876.64	\$4,953.28	\$4,953.28	\$3,438.37	\$3,438.37	\$3,714.96	\$7,876.64	\$7,876.64	\$4,953.28	\$4,953.28	\$4,543.83	\$4,201.09

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 2012 and Overall Oct 2011 - May 2012									
	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Combined Oct 2011 - May 2012
Independent Variables:	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	4
Safety walking around at night									
Quality of daytime tours			5		4		3	3	6
Variety of daytime tours	2								
Quality of nighttime tours									
Variety of nighttime tours									8
Quality of shopping	4	1	7		2	2	4		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	1
% of Overall Satisfaction Accounted For	49.9%	46.6%	50.2%	43.1%	43.9%	39.4%	46.2%	53.9%	46.8%

NOTE: Only significant variables are ranked.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by six significant factors in the May 2012 Period. By rank order they are:
 - **Price of things on Guam,**
 - **Cleanliness of beaches and parks,**
 - **Quality of day time tours,**
 - **Quality of hotel accommodations,**
 - **Ease of getting around, and**
 - **Variety of shopping.**
- With all six factors the overall r^2 is .539 meaning that **53.9% of overall satisfaction is accounted for by these six factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2011, and Jan, Feb, Mar, Apr, May 2012 and Overall Oct 2011 - May 2012									
	Oct-11	Nov-11	Dec-1	Jan-1	Feb-1	Mar-1	Apr-1	May-1	Combine d Oct 2011 - May 2012
Independent Variables:	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									
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%	3.0%

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 two significant factors in the May 2012 Period. By rank order they are:
 - **Quality of shopping, and**
 - **Quality of hotel accommodations.**
- With these two factors the overall r^2 is .057 meaning that **5.7% of per person on island expenditure is accounted for by these two factors.**