



GUAM VISITORS BUREAU
Japan Visitor Tracker Exit Profile
FY2012 MARKET SEGMENTATION –
NOVEMBER 2011



Prepared by: QMark Research

Information contained herein is the property of the Guam Visitors Bureau.

The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.

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 **325** 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 **325** 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

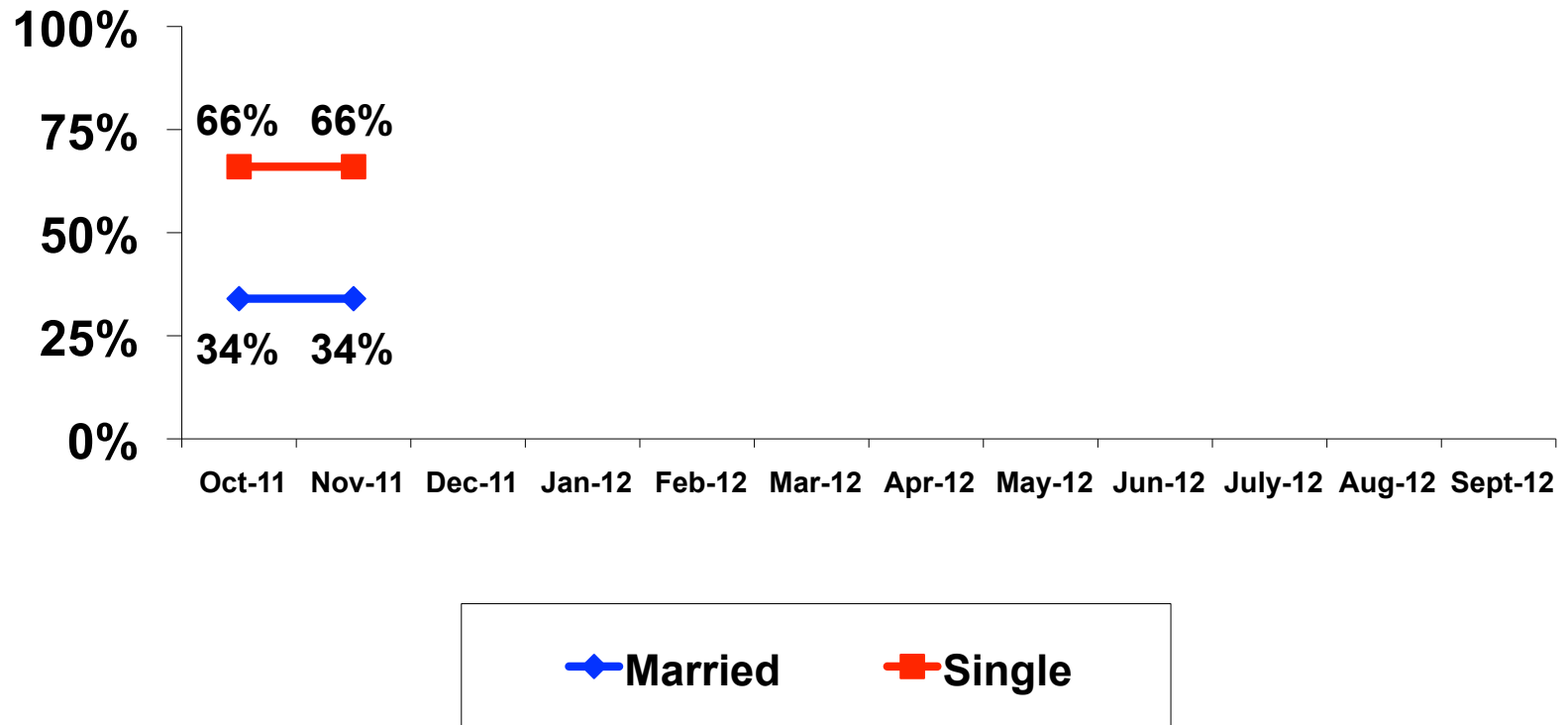
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.18/Q.19/Q.28
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%										
Office Lady	14%	10%										
Group	3%	2%										
Silver	2%	2%										
Wedding	4%	7%										
Sport	67%	69%										
18-35	77%	82%										
36-55	19%	15%										
Child	6%	7%										
Honeymoon	6%	7%										
Repeat	33%	36%										
TOTAL	326	325										

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	112	34	5	1	6	11	69	66	38	20	20	52
		Col %	34%	67%	15%	14%	100%	48%	31%	25%	76%	95%	95%	45%
	Single	Count	213	17	28	6		12	154	200	12	1	1	64
		Col %	66%	33%	85%	86%		52%	69%	75%	24%	5%	5%	55%
Total	Count		325	51	33	7	6	23	223	266	50	21	21	116

Average Age Tracking



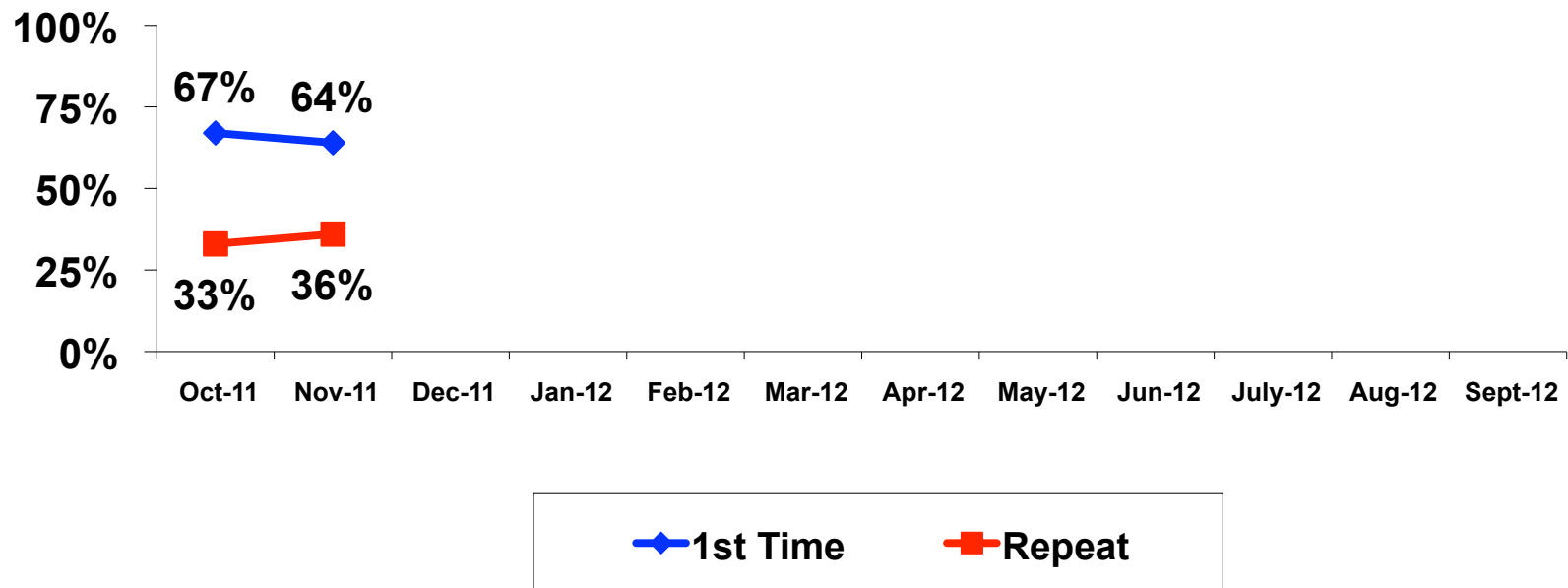
Age Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
D.	18-34	Count	261	25	31	7		16	190	261		8	18	77
		Col %	80%	49%	94%	100%		70%	85%	98%		38%	86%	66%
	35-54	Count	54	19	2			3	29	5	49	12	3	33
		Col %	17%	37%	6%			13%	13%	2%	98%	57%	14%	28%
	55+	Count	10	7			6	4	4		1	1		6
		Col %	3%	14%			100%	17%	2%		2%	5%		5%
Total	Count		325	51	33	7	6	23	223	266	50	21	21	116
D.	Mean		29.6	37.8	27.1	26.0	61.8	35.9	28.2	25.9	43.7	38.4	29.5	33.0
	Median		27	36	27	27	61	30	26	26	42	37	28	30

Income Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.31	Less than Y2 million	Count	26	2	3	1	1	3	18	23	2		1	8
		Col %	9%	4%	10%	17%	17%	14%	9%	10%	4%		5%	8%
	Y2,000,001 - Y3,000,000	Count	45	6	8	2		3	33	42	3	1	7	9
		Col %	16%	13%	26%	33%		14%	17%	18%	6%	5%	35%	9%
	Y3,000,001 - Y4,000,000	Count	52	5	6		1	3	41	51		3	7	14
		Col %	18%	11%	19%		17%	14%	21%	22%		14%	35%	14%
	Y4,000,001 - Y5,000,000	Count	47	13	4	2		3	34	36	10	5	3	18
		Col %	17%	29%	13%	33%		14%	18%	16%	21%	24%	15%	18%
	Y5,000,001 - Y7,000,000	Count	41	8	5		2	3	21	30	8	6	2	12
		Col %	14%	18%	16%		33%	14%	11%	13%	17%	29%	10%	12%
	Y7,000,001 - Y10,000,000	Count	37	6	3		2	3	22	23	12			24
		Col %	13%	13%	10%		33%	14%	11%	10%	26%			24%
	Y10,000,001 or more	Count	32	5	2	1		3	21	21	11	6		15
		Col %	11%	11%	6%	17%		14%	11%	9%	23%	29%		15%
	No Income	Count	4						3	3	1			1
		Col %	1%						2%	1%	2%			1%
Total	Count		284	45	31	6	6	21	193	229	47	21	20	101

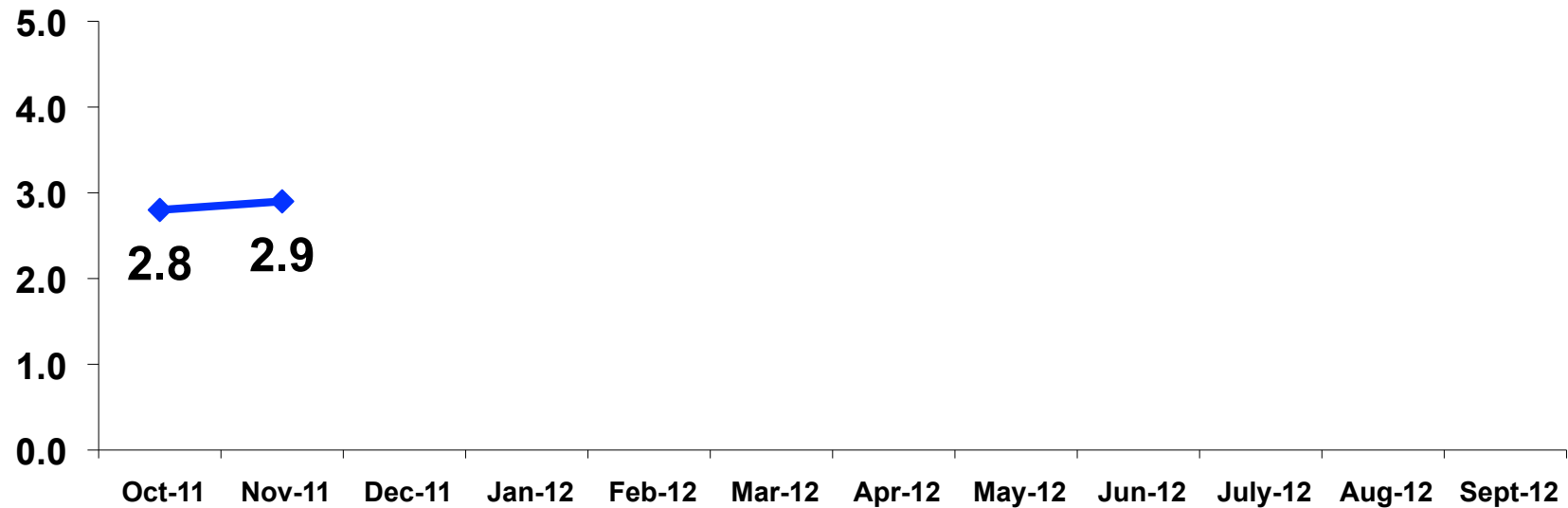
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.3A	Yes	Count	209	30	21	4	2	15	147	188	17	9	16	
		Col %	64%	59%	64%	57%	33%	65%	66%	71%	34%	43%	76%	
	No	Count	116	21	12	3	4	8	76	78	33	12	5	116
		Col %	36%	41%	36%	43%	67%	35%	34%	29%	66%	57%	24%	100%
Total		Count	325	51	33	7	6	23	223	266	50	21	21	116

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	3.2	2.8	3.1	3.5	3.4	2.8	2.8	3.1	3.2	3.9	2.8
Median	3	3	3	3	4	3	3	3	3	3	4	3
Minimum	1	1	2	2	3	2	1	1	2	2	2	1
Maximum	7	7	4	4	4	7	7	7	7	5	7	5

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	70	13	8	1	7	50	55	11	5	7	22
		Col %	22%	25%	24%	17%	30%	23%	21%	22%	24%	33%	19%
	Free-time package tours	Count	234	34	24	5	14	159	194	35	15	14	86
		Col %	72%	67%	73%	83%	61%	72%	73%	70%	71%	67%	75%
	Individually arranged travel	Count	8	1			2	6	5	3	1		3
		Col %	2%	2%			9%	3%	2%	6%	5%		3%
	Group tour	Count	7	1	1	7		4	7				3
		Col %	2%	2%	3%	100%		2%	3%				3%
	Other	Count	2	2					1	1			
		Col %	1%	4%					0%	2%			
	Company paid travel	Count	2					2	2				1
		Col %	1%					1%	1%				1%
Total	Count		323	51	33	7	6	23	221	264	50	21	115

Travel Motivation Segmentation

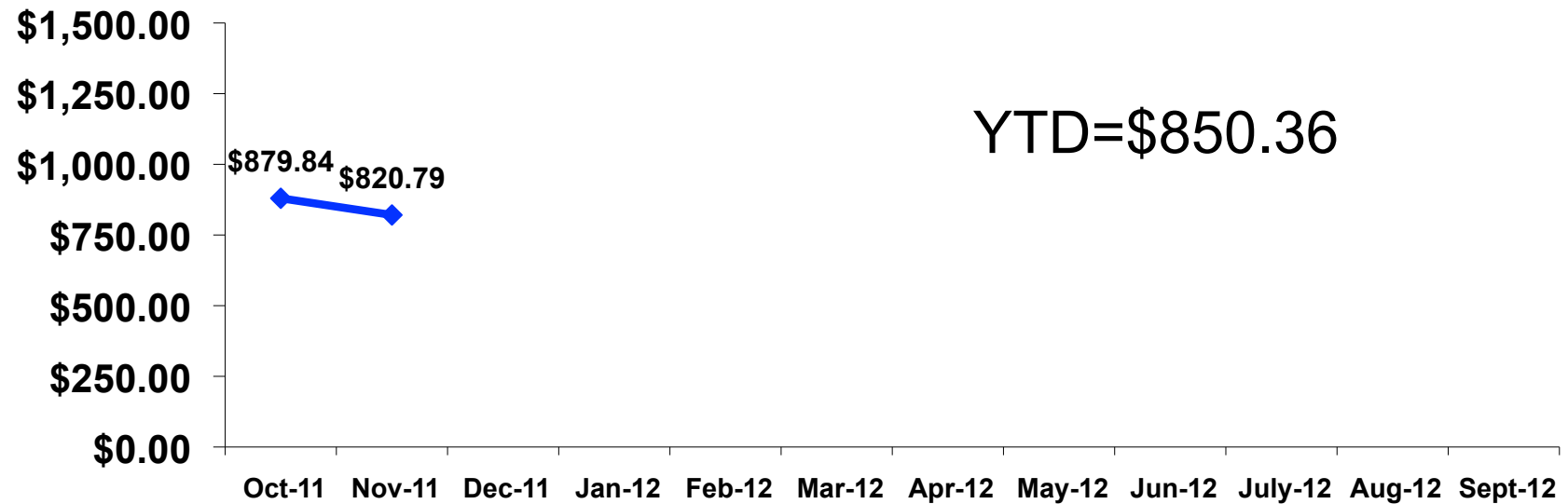
	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.5 Beautiful seas, beaches, tropical climate	59%	45%	58%	43%	50%	9%	64%	59%	60%	57%	48%	57%
Pleasure	52%	41%	48%	14%	33%		57%	54%	46%	62%	33%	50%
Short travel time	40%	37%	36%	29%	33%		40%	39%	44%	62%	48%	47%
Just to relax	37%	27%	39%	43%	33%		37%	36%	44%	33%	14%	42%
Price of the tour package	36%	35%	33%	14%	33%		35%	35%	44%	43%	24%	39%
Shopping	34%	29%	39%	29%	33%	4%	37%	36%	28%	29%	29%	34%
A previous visit	24%	29%	30%	29%	33%	22%	22%	20%	48%	48%	14%	58%
Water sports	26%	14%	21%		17%		38%	27%	20%	14%	10%	22%
Recommendation of friend, relative, travel agency	21%	10%	21%	14%			22%	23%	14%	14%	5%	9%
It is a safe place to spend a vacation	15%	22%	12%	14%			16%	15%	20%	33%	14%	17%
To get married or Attend wedding	7%	22%	6%		17%	100%	5%	6%	6%	10%	14%	7%
Honeymoon	6%	4%	6%			13%	7%	7%	4%		100%	4%
SCUBA diving	6%	4%	15%				9%	7%			5%	9%
Company or Business trip	3%		3%	43%			3%	4%	2%			5%
Other	2%	4%					2%	2%	2%	10%		3%
Organized Sporting Activity	2%	2%					2%	2%	2%	5%		2%
To visit friends or relatives	2%	2%			17%	4%	1%	2%				3%
To golf	2%						2%	1%	6%			3%
My company sponsored me	1%	2%					1%	0%	4%			2%
Special promotion	1%	2%					1%	1%				
Promotional materials from GVB	0%						0%		2%			1%
Career certification or testing	0%						0%	0%				1%
Total Cases	325	51	33	7	6	23	223	266	50	21	21	116

Information Sources Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.1 Internet	72%	74%	67%	43%	83%	68%	71%	73%	70%	67%	52%	71%
Travel guide book at bookstores	66%	66%	79%	71%	67%	68%	67%	68%	58%	52%	76%	51%
Travel agent brochure	42%	36%	45%		33%	23%	47%	43%	38%	38%	67%	36%
I have been to Guam before	35%	36%	33%	43%	50%	32%	33%	28%	66%	52%	24%	97%
Friend or relative	24%	16%	30%	14%		18%	27%	26%	14%	24%	24%	16%
Magazine	22%	16%	21%		17%	5%	24%	23%	16%	10%	29%	19%
TV	7%	8%	6%	29%		5%	8%	6%	16%	10%	5%	7%
Company travel department	4%	4%					4%	5%	4%	5%		5%
Newspaper	2%				17%		1%	1%	2%			2%
GVB promotional activities	0%	2%			17%							1%
Total Cases	324	50	33	7	6	22	223	265	50	21	21	116

SECTION 3 **EXPENDITURES**

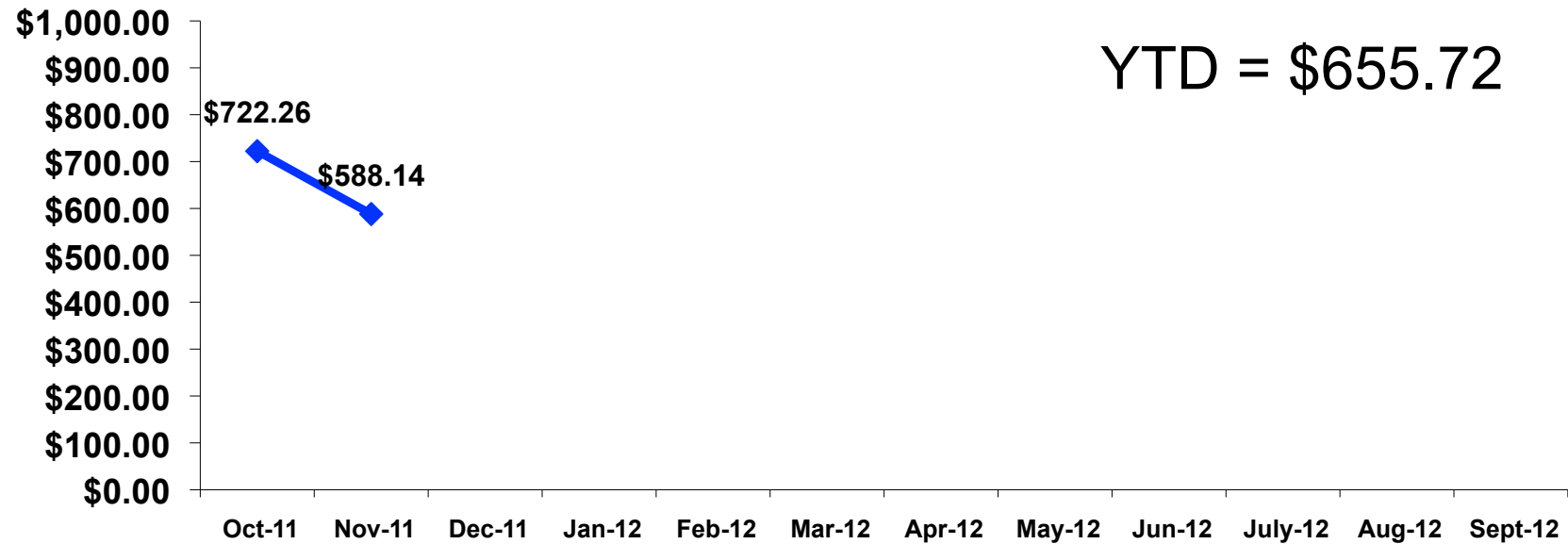
Prepaid Expenditures Tracking



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Prepaid	Mean	\$820.79	\$823.27	\$923.02	\$603.31	\$922.45	\$927.47	\$850.58	\$800.17	\$932.65	\$768.81	\$1,365.51	\$773.07
per	Median	\$774	\$731	\$839	\$613	\$906	\$904	\$774	\$749	\$774	\$774	\$1,033	\$710
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
converted to \$	Maximum	\$3,227.06	\$3,227.06	\$2,194.40	\$1,290.82	\$1,957.75	\$3,227.06	\$3,227.06	\$2,581.64	\$3,227.06	\$1,936.23	\$3,227.06	\$2,581.64

On-Island Expenditures Tracking



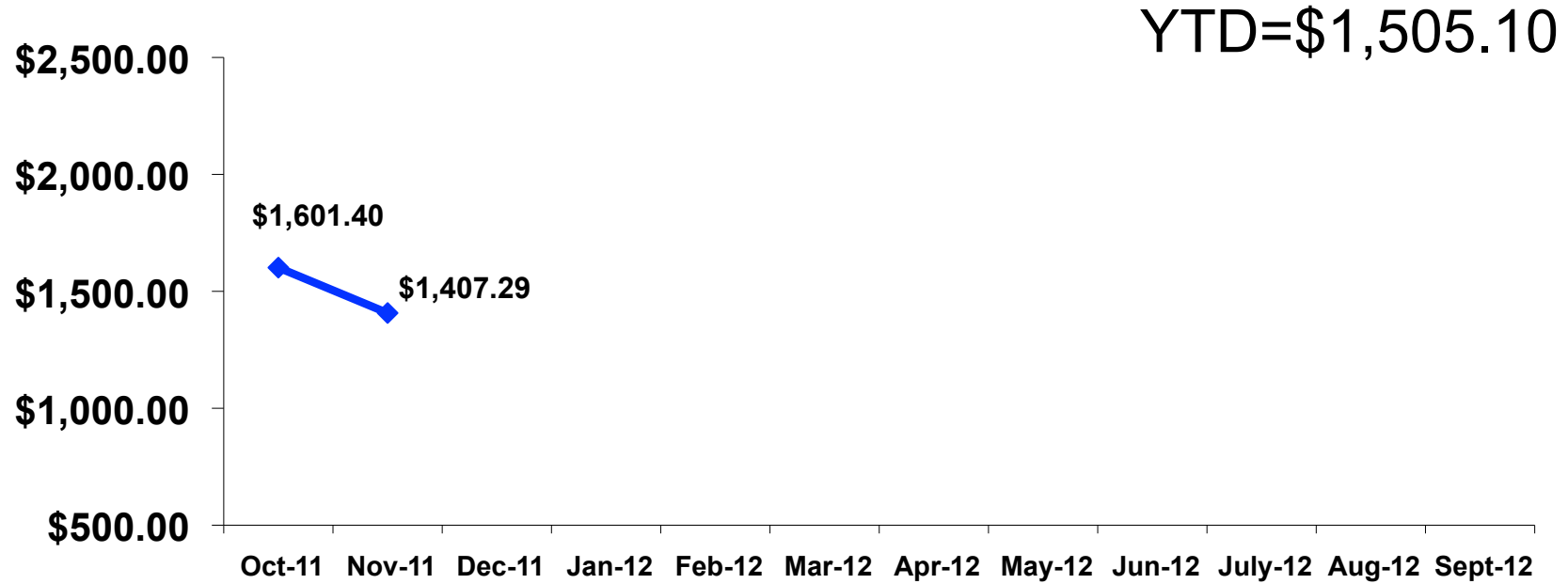
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Per person on-island exp	Mean	\$588.14	\$470.34	\$883.99	\$382.14	\$635.00	\$781.09	\$634.25	\$622.73	\$423.55	\$272.86	\$710.08	\$523.53
	Median	\$480	\$250	\$715	\$450	\$600	\$500	\$500	\$500	\$300	\$225	\$500	\$378
	Minimum	\$0.00	\$0.00	\$100.00	\$75.00	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Maximum	\$3,750.00	\$2,500.00	\$3,750.00	\$600.00	\$1,000.00	\$2,500.00	\$3,750.00	\$3,750.00	\$2,500.00	\$800.00	\$2,500.00	\$2,395.00

On-Island Expense Breakdown

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
F&B-HOTEL	Mean	\$23.41	\$45.12	\$13.76	\$1.43	\$248.33	\$66.70	\$25.46	\$14.98	\$39.88	\$9.57	\$47.57	\$28.44
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$95.00	\$0.00	\$0.00	\$0.00	\$8.00	\$0.00	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$28.69	\$27.96	\$23.61	\$11.43	\$48.33	\$29.57	\$27.84	\$25.55	\$43.34	\$33.81	\$74.52	\$39.89
	Median	\$10.00	\$10.00	\$12.00	\$0.00	\$40.00	\$0.00	\$10.00	\$10.00	\$20.00	\$20.00	\$40.00	\$20.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$65.68	\$83.73	\$78.03	\$40.00	\$125.00	\$25.65	\$58.33	\$60.49	\$87.50	\$109.52	\$127.62	\$72.96
	Median	\$30.00	\$30.00	\$50.00	\$0.00	\$100.00	\$0.00	\$30.00	\$30.00	\$50.00	\$100.00	\$135.00	\$50.00
OPTIONAL TOUR	Mean	\$73.17	\$41.73	\$61.97	\$14.29	\$166.67	\$81.30	\$89.34	\$72.54	\$69.66	\$9.52	\$149.19	\$76.75
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$210.74	\$311.47	\$365.97	\$121.43	\$266.67	\$387.83	\$189.72	\$212.60	\$206.00	\$359.52	\$375.05	\$216.68
	Median	\$50.00	\$50.00	\$100.00	\$150.00	\$200.00	\$80.00	\$50.00	\$50.00	\$40.00	\$100.00	\$250.00	\$50.00
GIFT/ SOUV- F&F AT HOME	Mean	\$138.87	\$174.16	\$166.67	\$61.43	\$470.00	\$303.13	\$148.79	\$134.08	\$127.54	\$108.57	\$309.38	\$136.34
	Median	\$50.00	\$50.00	\$100.00	\$50.00	\$360.00	\$120.00	\$50.00	\$50.00	\$50.00	\$50.00	\$200.00	\$50.00
LOCAL TRANS	Mean	\$16.07	\$13.67	\$9.24	\$10.00	\$16.67	\$4.78	\$14.12	\$15.54	\$19.80	\$6.29	\$13.62	\$17.70
	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	\$232.46	\$241.57	\$237.76	\$340.00	\$0.00	\$138.00	\$272.43	\$233.74	\$266.46	\$245.57	\$250.67	\$210.96
	Median	\$0.00	\$0.00	\$0.00	\$80.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$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	\$1,407.29	\$1,293.61	\$1,807.61	\$985.45	\$1,483.78	\$1,708.55	\$1,484.79	\$1,422.45	\$1,358.51	\$1,041.66	\$2,075.58	\$1,292.10
per	Median	\$1,271.75	\$1,043.88	\$1,706.08	\$1,052.38	\$1,472.01	\$1,766.75	\$1,350.06	\$1,277.04	\$1,268.12	\$1,043.88	\$2,107.61	\$1,214.75
person	Minimum	\$.00	\$.00	\$400.00	\$75.00	\$325.00	\$.00	\$.00	\$.00	\$.00	\$.00	\$266.67	\$.00
expense	Maximum	\$5,727.06	\$5,727.06	\$4,589.03	\$1,890.82	\$2,957.75	\$5,727.06	\$5,727.06	\$4,589.03	\$5,727.06	\$2,036.23	\$5,727.06	\$3,206.64

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 2011, and Overall Oct - Nov 2011			
	Oct-11	Nov-11	Combined Oct - Nov 2011
Independent Variables:	rank	rank	rank
Cleanliness of beaches & parks	3	2	3
Ease of getting around	6		
Safety walking around at night			
Quality of daytime tours			
Variety of daytime tours	2		5
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping	4	1	1
Variety of shopping			
Price of things on Guam	1	4	4
Quality of hotel accommodations	5	3	2
% of Overall Satisfaction Accounted For	49.9%	46.6%	48.1%
NOTE: Only significant variables are ranked.			

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by four significant factors in the November 2011 Period. By rank order they are:
 - **Quality of shopping,**
 - **Cleanliness of beaches and parks,**
 - **Quality of hotel accommodations, and**
 - **Price of things on Guam.**
- With all four factors the overall r^2 is .466 meaning that **46.6% of overall satisfaction is accounted for by these factors.**

**Comparison of Drivers of Per Person On-Island Expenditures, Oct.,
Nov 2011, and Overall Oct-Nov 2011**

	Oct-11	Nov-11	Combined Oct - Nov 2011
Independent Variables:	rank	rank	rank
Cleanliness of beaches & parks			
Ease of getting around			
Safety walking around at night			
Quality of daytime tours			
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours		2	
Quality of shopping	1	1	1
Variety of shopping			
Price of things on Guam			
Quality of hotel accommodations	2		2
% of Overall Satisfaction Accounted For	9.2%	8.1%	7.5%

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 November 2011 Period. They are:
 - **Quality of shopping, and**
 - **Variety of nighttime tours.**
- With these two factors the r^2 is .081 meaning that **8.1% of Per person on island expenditures are accounted for by these factors.**