



GUAM VISITORS BUREAU Japan Visitor Tracker Exit Profile FY2010 MARKET SEGMENTATION – OCTOBER 2009



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 **328** 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 **328** 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:
 - 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.

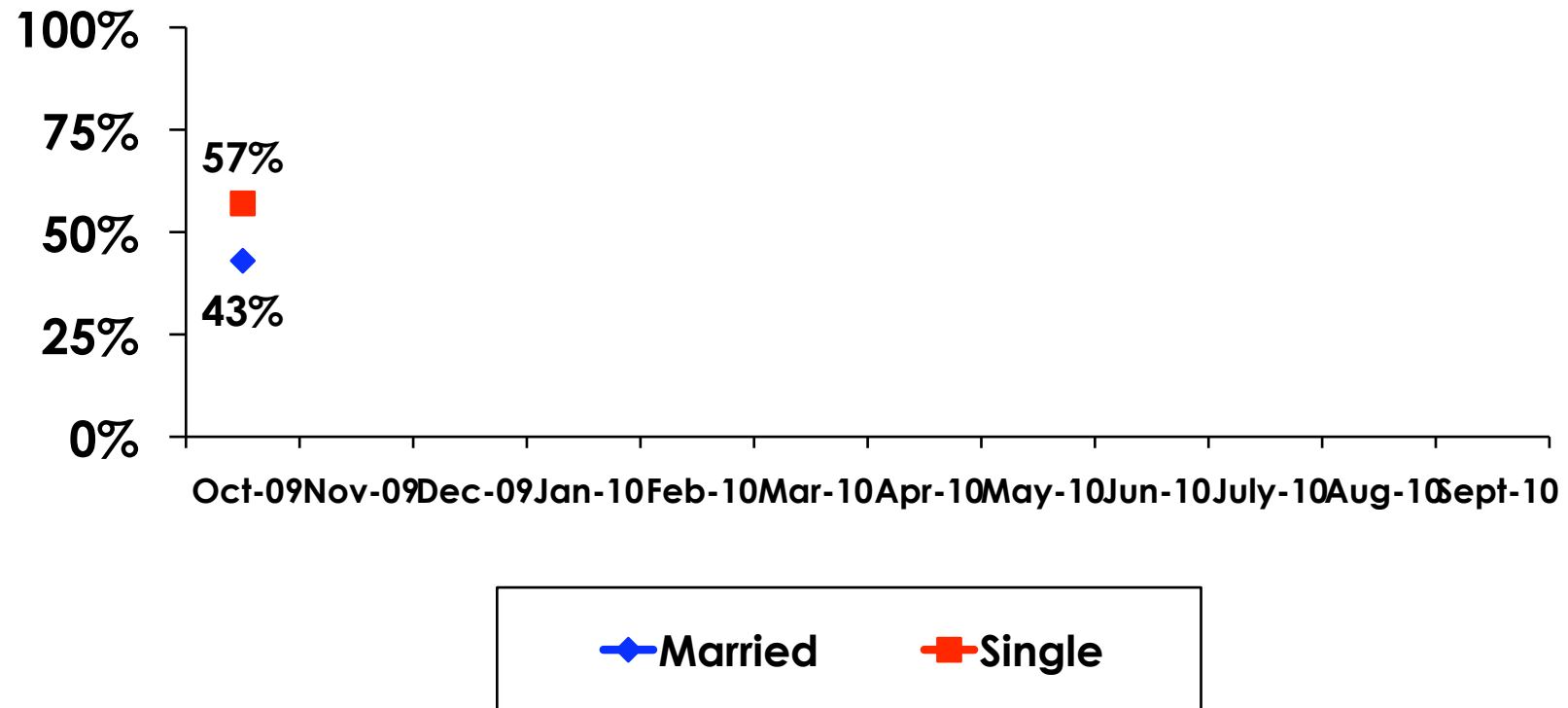
Highlighted Segments

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

SECTION 1 **PROFILE OF RESPONDENTS**

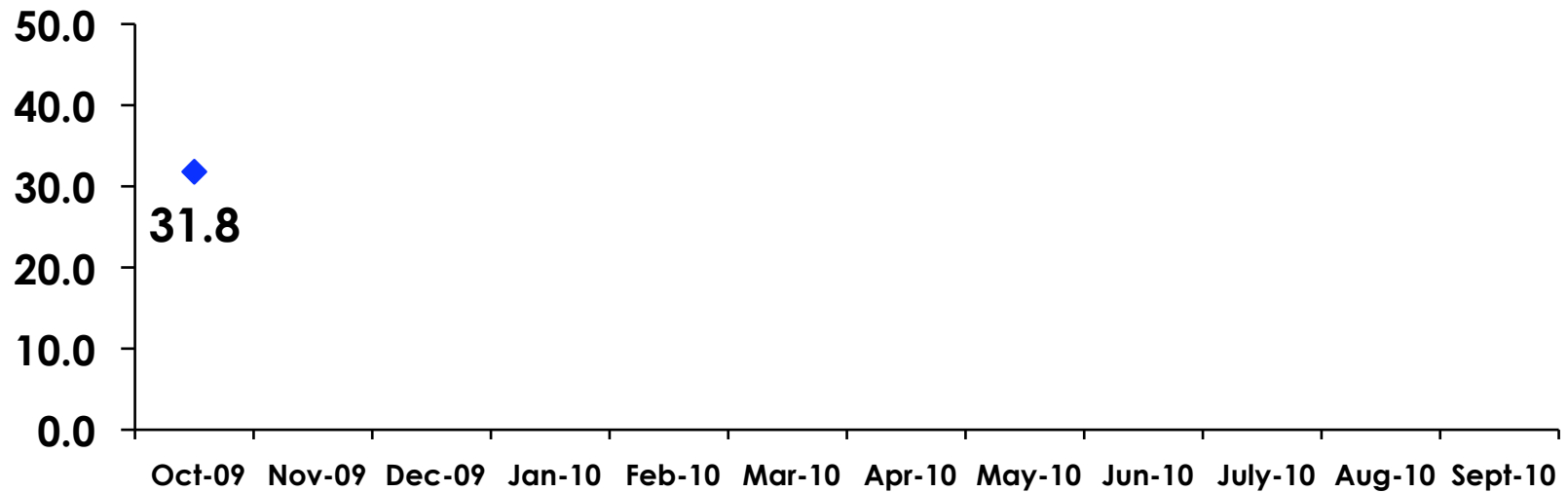
Marital Status Tracking



Marital Status Tracking

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
C. Married	Count	140	44	64	70	10	4	8	17	17	14	15
	Col %	43%	62%	49%	44%	21%	44%	57%	63%	94%	38%	94%
Single	Count	188	27	67	90	38	5	28	6	10	1	23
	Col %	57%	38%	51%	56%	79%	56%	100%	43%	37%	6%	62%
Total	Count	328	71	131	160	48	9	28	14	27	18	37

Average Age Tracking



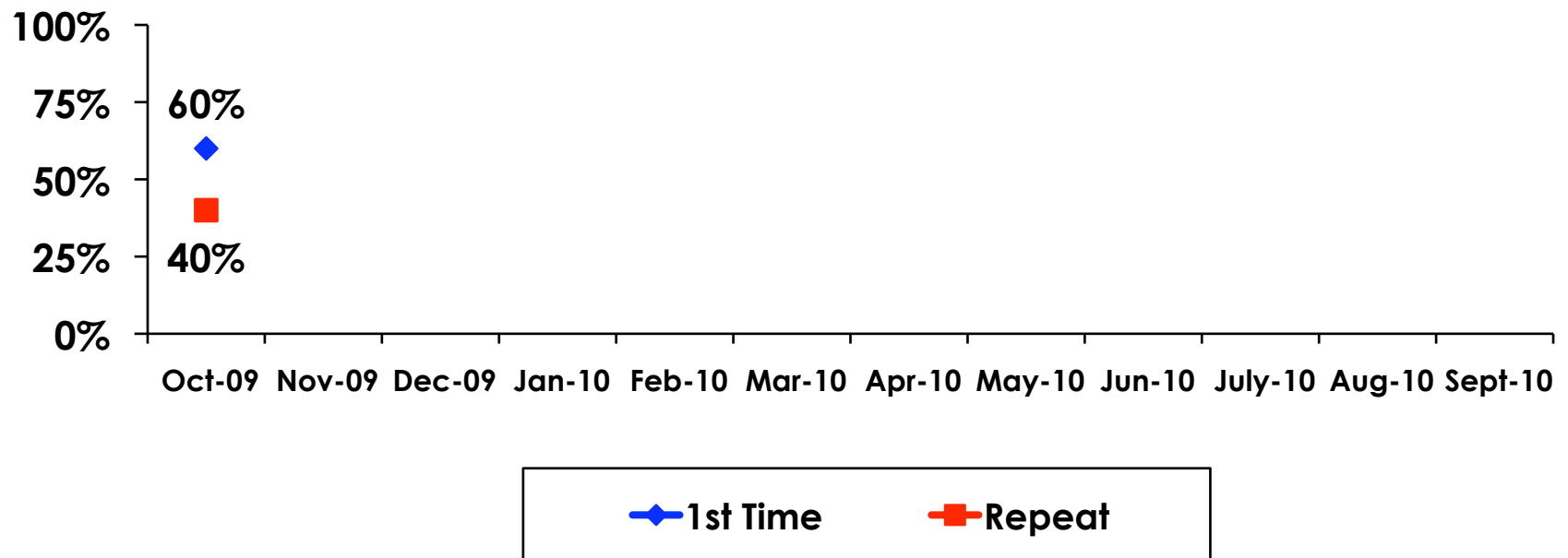
Age Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	222	36	70	117	37	6	28	7	17	17	26
		Col %	68%	51%	54%	73%	79%	67%	100%	50%	63%	94%	70%
	35-54	Count	93	29	55	37	9	3		6	7	1	10
		Col %	28%	41%	42%	23%	19%	33%		43%	26%	6%	27%
	55+	Count	12	6	5	6	1			1	3		1
		Col %	4%	8%	4%	4%	2%			7%	11%		3%
Total	Count		327	71	130	160	47	9	28	14	27	18	37
D.	Mean		31.8	35.3	34.7	30.6	30.4	31.3	21.5	36.2	35.1	26.7	30.2
	Median		29	34	34	27	28	29	22	34	31	26	28

Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31 Less than Y2 million	Count		19	3	6	7	4	1	6		1	1	3	1
	Col %		6%	5%	5%	5%	9%	11%	25%		4%	6%	8%	7%
Y2,000,001 - Y3,000,000	Count		31	4	7	16	10	1			3	2	3	1
	Col %		10%	6%	6%	11%	23%	11%			12%	11%	8%	7%
Y3,000,001 - Y4,000,000	Count		52	8	16	25	11	2	2	1	4	4	4	1
	Col %		17%	13%	13%	17%	25%	22%	8%	8%	15%	22%	11%	7%
Y4,000,001 - Y5,000,000	Count		52	10	23	28	6		3	3	6	4	6	2
	Col %		17%	16%	19%	19%	14%		13%	23%	23%	22%	17%	13%
Y5,000,001 - Y7,000,000	Count		59	16	28	25	6	2	2	3	7	7	5	4
	Col %		19%	25%	23%	17%	14%	22%	8%	23%	27%	39%	14%	27%
Y7,000,001 - Y10,000,000	Count		29	9	13	17	2	1	1	2	2		3	3
	Col %		10%	14%	11%	11%	5%	11%	4%	15%	8%		8%	20%
Y10,000,001 or more	Count		56	14	29	28	5	2	6	4	3		11	3
	Col %		18%	22%	24%	19%	11%	22%	25%	31%	12%		31%	20%
No Income	Count		5		1	3			4				1	
	Col %		2%		1%	2%			17%				3%	
Total	Count		303	64	123	149	44	9	24	13	26	18	36	15

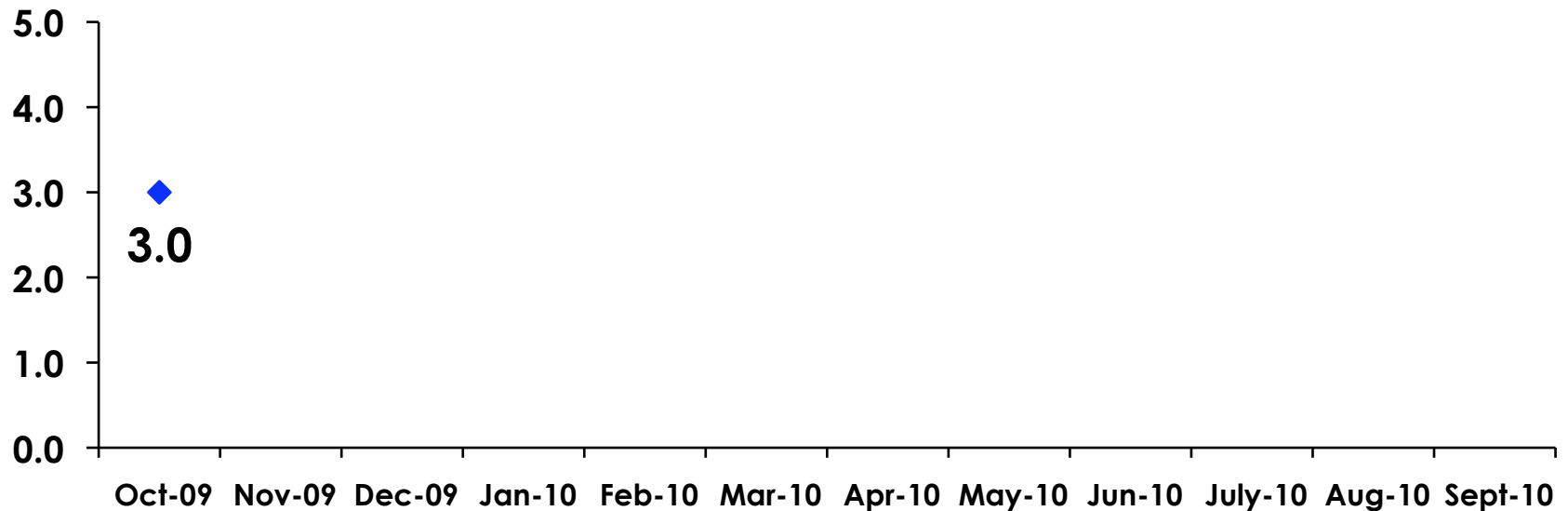
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A	Yes	Count	197	32		104	29	7	22	8	19	16	22	8
		Col %	60%	45%		65%	60%	78%	79%	57%	70%	89%	59%	50%
	No	Count	131	39	131	56	19	2	6	6	8	2	15	8
		Col %	40%	55%	100%	35%	40%	22%	21%	43%	30%	11%	41%	50%
Total		Count	328	71	131	160	48	9	28	14	27	18	37	16

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	3.0	2.9	3.0	2.9	2.9	2.9	2.7	2.9	3.5	3.3	3.1	2.9
Median	3	3	3	3	3	3	3	3	3	3	3	3
Minimum	1	2	1	2	2	1	2	2	2	2	2	2
Maximum	16	7	7	7	7	4	4	4	7	5	6	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 Col %	64 20%	17 24%	24 18%	33 21%	8 17%	3 11%	2 14%	9 33%	6 33%	5 14%	7 44%
	Free-time package tours	Count Col %	214 65%	38 54%	80 61%	106 67%	34 71%	24 86%	9 64%	12 44%	10 56%	26 70%	5 31%
	Individually arranged travel	Count Col %	38 12%	11 15%	24 18%	14 9%	5 10%	1 4%	3 21%	2 7%	2 11%	4 11%	3 19%
	Group tour	Count Col %	9 3%	3 4%	2 2%	4 3%	1 2%	9 100%		2 7%		1 3%	
	Other	Count Col %	2 1%	2 3%	1 1%	2 1%				2 7%		1 3%	1 6%
Total	Count		327	71	131	159	48	9	28	14	27	18	37

Travel Motivation Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Beautiful seas, beaches, tropical climate	52%	44%	41%	61%	46%	33%	86%	14%	15%	33%	70%	50%
Short travel time	45%	54%	47%	48%	54%		46%	29%	4%	22%	51%	31%
Price of the tour package	41%	31%	34%	45%	48%	11%	64%	36%		11%	49%	19%
Pleasure	38%	30%	34%	44%	42%	22%	54%	21%	7%	28%	41%	19%
Just to relax	33%	34%	40%	36%	38%	11%	36%	21%	4%	17%	38%	25%
Shopping	29%	31%	32%	35%	46%		36%	14%	7%	22%	38%	25%
A previous visit	25%	38%	63%	23%	31%	11%	21%		7%	11%	19%	25%
Water sports	22%	15%	16%	28%	19%	11%	32%		4%	17%	24%	13%
It is a safe place to spend a vacation	17%	18%	19%	19%	17%		25%	14%			27%	19%
Recommendation of friend, relative, travel agency	14%	10%	8%	16%	13%	33%	11%	29%		17%	8%	13%
To get married or Attend wedding	8%	23%	6%	11%	4%	22%		7%	100%	11%	3%	31%
SCUBA diving	6%	1%	7%	7%	2%		4%	14%		6%	46%	
Honeymoon	5%	1%	2%	6%				14%	7%	100%		
To golf	3%		5%	3%				71%		6%	8%	13%
Other	4%	4%	7%	3%		11%	4%				5%	
Company or Business trip	3%	1%	4%	4%		44%		14%			5%	
Career certification or testing	2%	1%	2%	1%	2%							
Organized Sporting Activity	1%	1%	1%	1%			7%	7%			3%	
To visit friends or relatives	1%		2%	1%				7%				
My company sponsored me	0%	1%		1%								
Promotional materials from GVB	0%		1%	1%								
Special promotion	0%					11%						
Total Cases	328	71	131	160	48	9	28	14	27	18	37	16

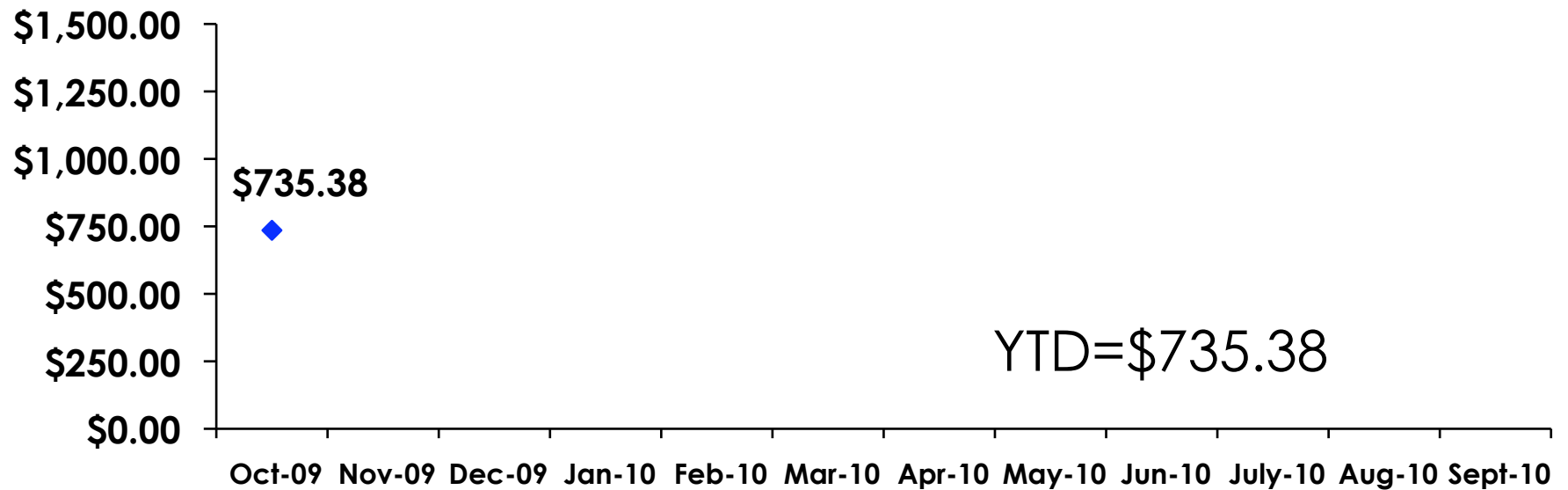
Information Sources

Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1 Internet	63%	63%	61%	62%	71%	38%	71%	50%	54%	56%	68%	38%
Travel guide book at bookstores	55%	53%	47%	62%	54%	75%	68%	36%	42%	67%	62%	56%
I have been to Guam before	36%	44%	89%	31%	35%	13%	21%	29%	19%	11%	35%	44%
Travel agent brochure	39%	37%	29%	48%	33%	13%	57%	50%	46%	67%	43%	25%
Friend or relative	17%	19%	10%	18%	17%	38%	25%	14%	35%	28%	8%	25%
Magazine	17%	16%	10%	18%	10%		18%	14%	12%	28%	19%	6%
TV	5%	6%	2%	6%	6%	13%	11%	7%	4%		3%	6%
Company travel department	3%	3%	3%	4%	2%	25%						
GVB office	1%		2%			13%					5%	
Other	1%	1%	2%	1%			4%					
Newspaper	1%		1%	1%			4%					
GVB promotional activities	1%		1%				4%				3%	
Total Cases	326	70	130	159	48	8	28	14	26	18	37	16

SECTION 3 **EXPENDITURES**

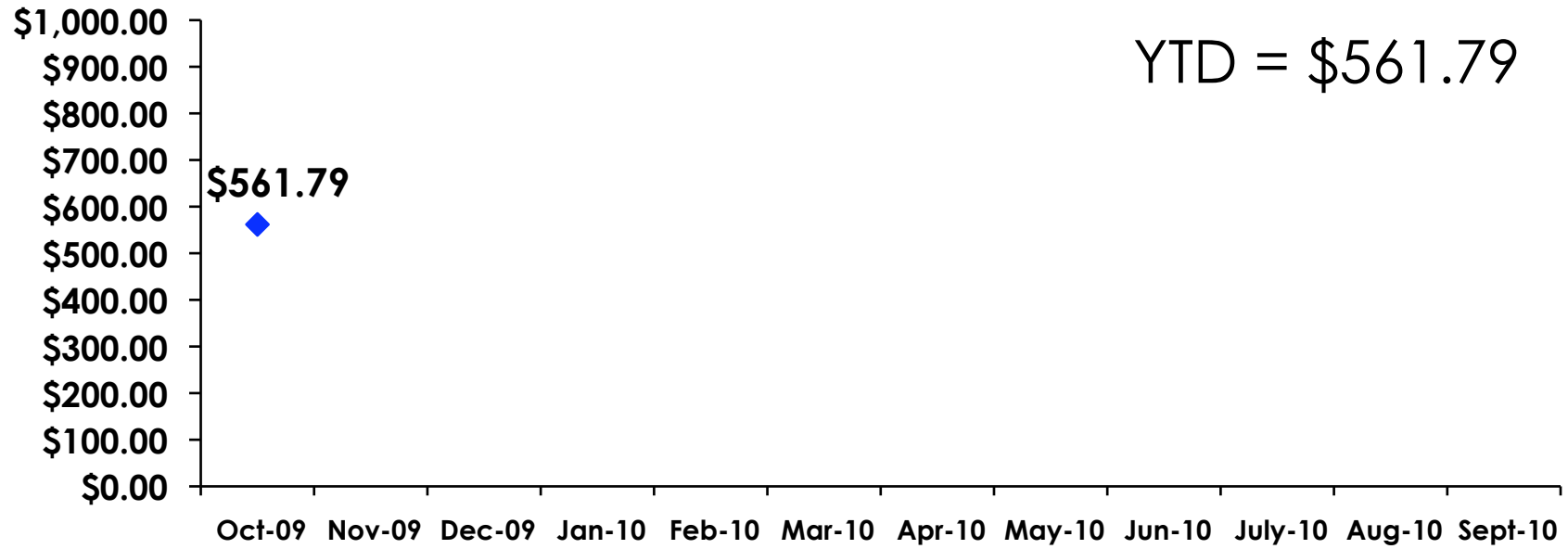
Prepaid Expenditures Tracking



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid per person converted to \$	Mean	\$735.38	\$891.06	\$707.30	\$813.09	\$604.23	\$267.78	\$513.69	\$676.60	\$1,623.07	\$1,365.76	\$758.81	\$1,015.92
	Median	\$615	\$727	\$614	\$671	\$545	\$0	\$342	\$659	\$1,118	\$1,034	\$559	\$978
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$368.84	\$0.00	\$0.00
	Maximum	\$6,706.16	\$6,706.16	\$6,706.16	\$6,706.16	\$1,635.18	\$1,303.98	\$3,355.31	\$1,816.25	\$6,706.16	\$6,426.74	\$6,706.16	\$3,185.43

On-Island Expenditures Tracking



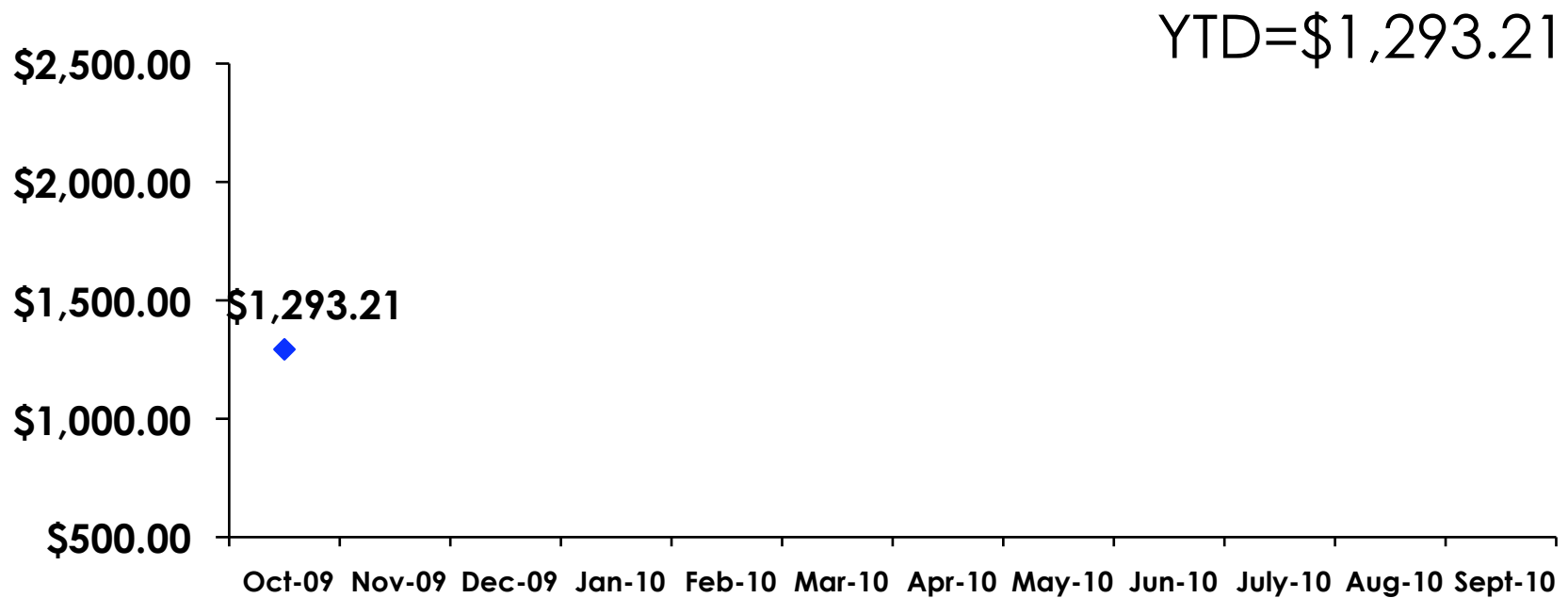
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$561.79	\$442.95	\$584.49	\$632.29	\$574.31	\$442.59	\$439.64	\$574.57	\$490.28	\$789.94	\$541.90	\$634.94
	Median	\$350	\$325	\$389	\$400	\$400	\$400	\$405	\$395	\$325	\$500	\$398	\$425
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$125.00	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$129.50
	Maximum	\$4,000.00	\$2,000.00	\$3,855.00	\$4,000.00	\$2,702.00	\$833.33	\$1,000.00	\$2,000.00	\$2,000.00	\$3,500.00	\$2,000.00	\$2,250.00

On-Island Expenditures Breakdown Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$47.39	\$67.73	\$41.95	\$48.85	\$13.04	\$23.89	\$2.86	\$18.57	\$74.59	\$48.61	\$24.46	\$269.31
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$55.00
F&B-FF REST/CONV	Mean	\$32.67	\$33.66	\$35.96	\$32.76	\$22.04	\$14.78	\$27.25	\$29.14	\$28.89	\$51.56	\$32.22	\$42.50
	Median	\$15.50	\$15.00	\$20.00	\$15.00	\$10.00	\$0.00	\$12.50	\$0.00	\$10.00	\$9.00	\$20.00	\$45.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$73.57	\$74.93	\$89.40	\$76.44	\$65.77	\$21.67	\$47.75	\$115.50	\$51.11	\$67.22	\$76.65	\$79.69
	Median	\$25.00	\$0.00	\$50.00	\$30.00	\$30.00	\$0.00	\$10.00	\$20.00	\$0.00	\$10.00	\$60.00	\$32.50
OPTIONAL TOUR	Mean	\$83.14	\$90.54	\$73.15	\$100.98	\$62.08	\$74.44	\$64.89	\$186.29	\$61.67	\$137.78	\$157.11	\$165.69
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$127.50	\$0.00	\$0.00	\$100.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$291.06	\$285.85	\$359.85	\$355.26	\$341.40	\$71.11	\$154.11	\$233.21	\$210.70	\$688.33	\$305.41	\$51.56
	Median	\$50.00	\$100.00	\$100.00	\$100.00	\$100.00	\$0.00	\$25.00	\$15.00	\$5.00	\$0.00	\$55.00	\$0.00
GIFT/SOUV- F&F AT HOME	Mean	\$152.67	\$200.31	\$169.33	\$219.75	\$132.13	\$147.78	\$75.43	\$122.14	\$133.56	\$276.94	\$99.62	\$122.88
	Median	\$50.00	\$100.00	\$50.00	\$100.00	\$100.00	\$30.00	\$35.00	\$0.00	\$80.00	\$150.00	\$60.00	\$75.00
LOCAL TRANS	Mean	\$15.23	\$14.30	\$23.49	\$13.78	\$15.67	\$1.89	\$8.50	\$20.00	\$18.37	\$4.28	\$20.84	\$17.50
	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	\$224.13	\$325.32	\$240.55	\$191.14	\$153.13	\$494.44	\$182.79	\$385.71	\$274.81	\$342.39	\$186.32	\$819.75
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$132.50	\$0.00	\$400.00

Total Expenditures Tracking



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Total	Mean	\$1,293.21	\$1,334.01	\$1,281.93	\$1,440.29	\$1,178.54	\$680.62	\$953.33	\$1,251.17	\$2,113.35	\$2,111.81	\$1,300.70	\$1,650.86
per	Median	\$1,053.40	\$1,143.25	\$1,010.72	\$1,223.55	\$1,009.78	\$500.00	\$835.31	\$1,011.21	\$1,667.69	\$1,922.10	\$1,000.00	\$1,379.94
person	Minimum	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$125.00	\$199.03	\$350.00	\$125.00	\$618.84	\$184.42	\$423.54
expense	Maximum	\$7,978.66	\$7,978.66	\$7,978.66	\$7,978.66	\$3,149.08	\$2,137.31	\$3,735.31	\$3,117.69	\$7,978.66	\$6,926.74	\$7,978.66	\$5,435.43

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.

Drivers of Overall Satisfaction, Oct 2009	
Drivers:	rank
Cleanliness of beaches & parks	4
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	
Quality of shopping	1
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	2
% of Overall Satisfaction Accounted For	52.1%
NOTE: Only significant drivers are included.	

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by four significant factors in the October 2009 Period by rank order they are:
 - **Quality of shopping,**
 - **Quality of hotel accommodations,**
 - **Variety of day time tours,**
 - **Cleanliness of beaches and parks.**
- With all four factors the overall r^2 is .521 meaning that **52.1% of overall satisfaction is accounted for by these four factors.**

Drivers of Per Person On Island Expenditures, Oct 2009	
Drivers:	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	
Quality of shopping	
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	
% of Per Person On Island Expenditures Accounted For	0.0%
NOTE: Only significant drivers are included.	

Drivers of Per Person On Island Expenditure

- In the October 2009 period, there were **no significant drivers** of Japanese visitor's Per person on-island expenditure.