



**GUAM VISITORS BUREAU**  
**Japan Visitor Tracker Exit Profile**  
**FY2011 MARKET SEGMENTATION**  
**SEPTEMBER 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

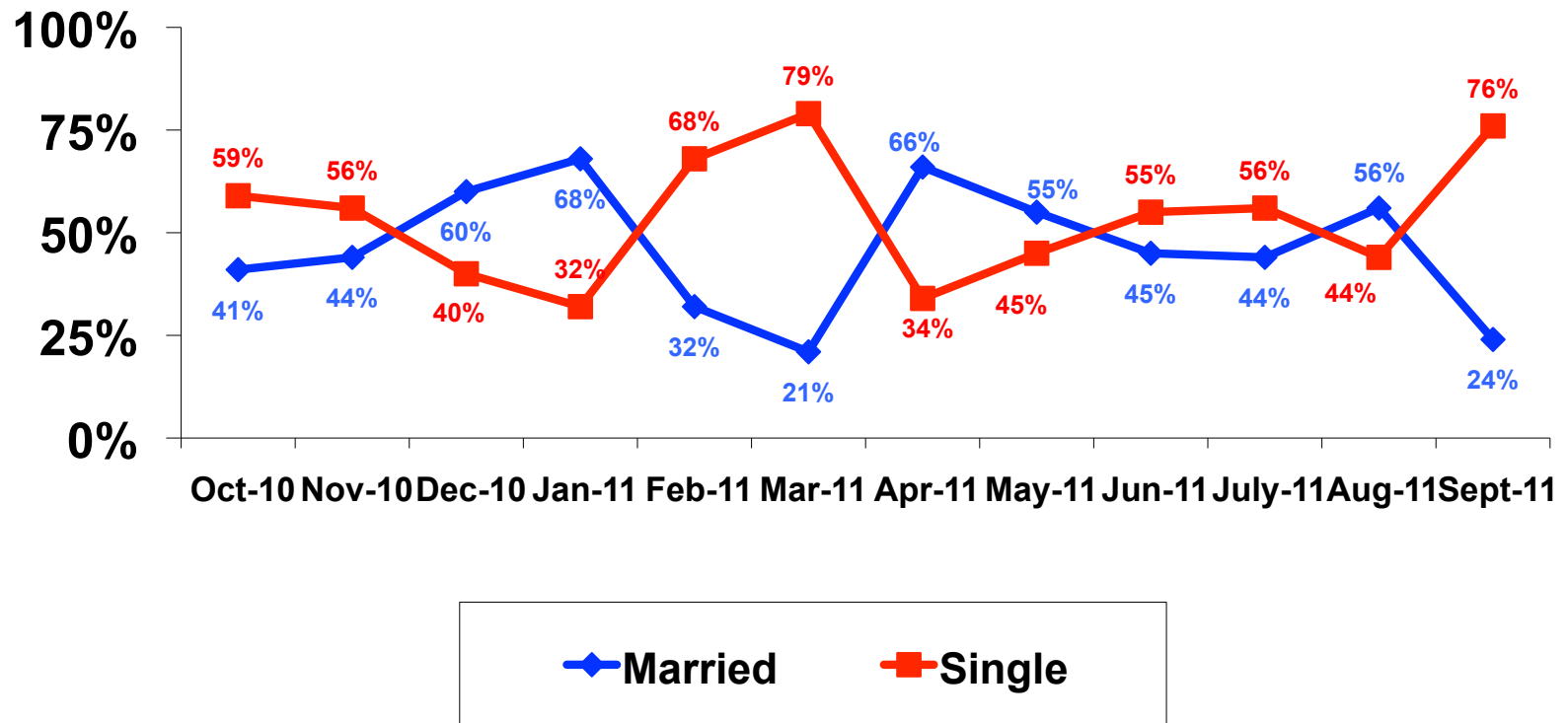
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

# 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%	20%	23%	44%	13%
<b>Repeaters</b>	38%	39%	42%	56%	29%	22%	47%	45%	41%	42%	41%	30%
<b>Shoppers</b>	58%	62%	57%	58%	64%	61%	64%	70%	79%	76%	84%	77%
<b>Seniors</b>	9%	8%	16%	10%	8%	8%	12%	11%	7%	6%	8%	4%
<b>OL/Salary-woman</b>	18%	14%	16%	10%	10%	3%	7%	17%	15%	15%	11%	6%
<b>Group Travelers</b>	6%	3%	6%	2%	5%	6%	2%	2%	4%	2%	1%	1%
<b>Students</b>	13%	13%	6%	8%	33%	65%	18%	2%	5%	7%	3%	45%
<b>Golfers</b>	4%	4%	4%	8%	6%	7%	4%	5%	4%	2%	3%	3%
<b>Wedding</b>	6%	5%	11%	2%	4%	3%	6%	5%	8%	4%	0%	2%
<b>Divers</b>	9%	10%	8%	9%	10%	12%	11%	10%	11%	12%	14%	13%
<b>Honey-mooner</b>	5%	5%	8%	3%	3%	1%	4%	6%	10%	5%	3%	3%
<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>	<b>327</b>	<b>327</b>	<b>327</b>	<b>327</b>

SECTION 1  
**PROFILE OF RESPONDENTS**

# Marital Status Tracking

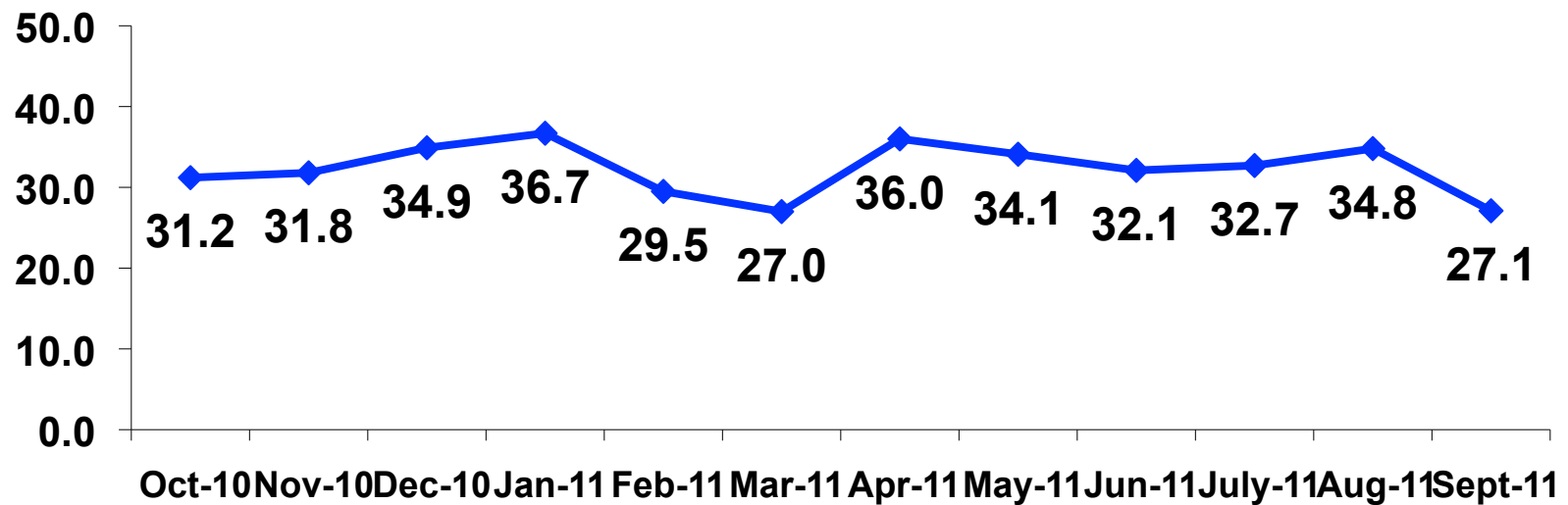


# Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
C. Married	Count		79	34	34	66	5		1	2	5	9	3	13
	Col %		24%	81%	35%	26%	26%		1%	22%	71%	82%	7%	100%
Single	Count		248	8	64	185	14	2	147	7	2	2	39	
	Col %		76%	19%	65%	74%	74%	100%	99%	78%	29%	18%	93%	
Total	Count		327	42	98	251	19	2	148	9	7	11	42	13



# Average Age Tracking



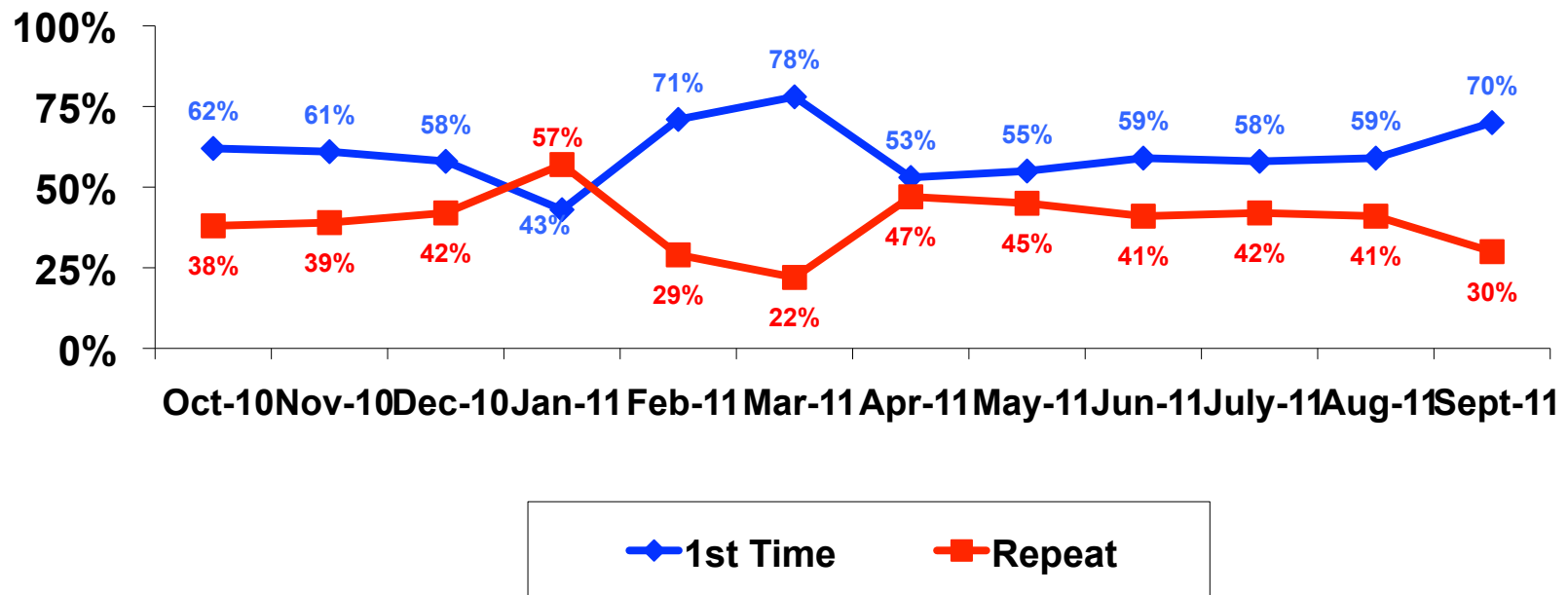
# Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	264	13	62	194	12	2	147	6	3	10	40	
		Col %	81%	31%	63%	77%	63%	100%	99%	67%	43%	91%	95%	
	35-54	Count	58	26	33	53	6		1	3	3	1	2	8
		Col %	18%	62%	34%	21%	32%		1%	33%	43%	9%	5%	62%
	55+	Count	5	3	3	4	1				1			5
		Col %	2%	7%	3%	2%	5%				14%			38%
Total	Count		327	42	98	251	19	2	148	9	7	11	42	13
D.	Mean		27.1	38.6	32.0	27.8	33.5	19.0	20.9	30.0	40.7	26.8	23.8	55.5
	Median		23	38	30	23	30	19	21	23	38	28	22	52

# Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than Y2	Count	18		5	13			15	1			4	
	million	Col %	7%		6%	6%			14%	13%			11%	
	Y2,000,001 -	Count	30	3	9	25	3		7	2	1	1	3	3
	Y3,000,000	Col %	11%	8%	10%	12%	19%		6%	25%	14%	9%	8%	25%
	Y3,000,001 -	Count	30	1	5	26	2		5			3	4	
	Y4,000,000	Col %	11%	3%	6%	13%	13%		5%			27%	11%	
	Y4,000,001 -	Count	37	6	12	30			7		1	1	7	
	Y5,000,000	Col %	14%	15%	13%	15%			6%		14%	9%	19%	
	Y5,000,00 -	Count	48	8	13	29	5		24	2	3	2	5	1
	Y7,000,000	Col %	18%	21%	15%	14%	31%		22%	25%	43%	18%	14%	8%
	Y7,000,001 -	Count	43	10	21	32	3		14	2		1	2	3
	Y10,000,000	Col %	16%	26%	24%	16%	19%		13%	25%		9%	6%	25%
	Y10,000,001	Count	42	10	20	33	3		21	1	2	1	8	4
	or more	Col %	16%	26%	22%	16%	19%		19%	13%	29%	9%	22%	33%
	No Income	Count	21	1	4	18		1	17			2	3	1
		Col %	8%	3%	4%	9%		100%	15%			18%	8%	8%
Total	Count		269	39	89	206	16	1	110	8	7	11	36	12

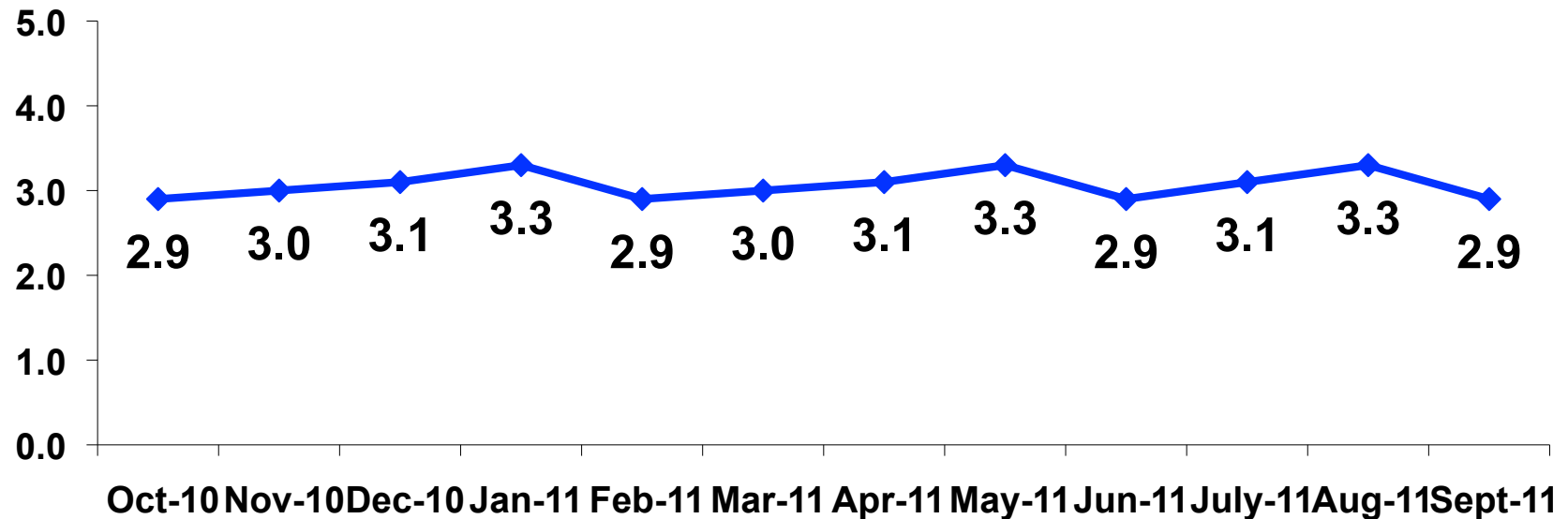
# Prior Trips to Guam Tracking



# Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		227	19		168	9	2	122	4	3	10	30	5
	Col %		70%	45%		67%	47%	100%	83%	44%	43%	91%	71%	38%
No	Count		98	23	98	82	10		25	5	4	1	12	8
	Col %		30%	55%	100%	33%	53%		17%	56%	57%	9%	29%	62%
Total	Count		325	42	98	250	19	2	147	9	7	11	42	13

# 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	2.9	3.4	2.9	2.9	3.1	2.5	2.7	2.9	2.7	3.1	2.9	2.8
Median	3	3	3	3	3	3	3	3	3	3	3	3
Minimum	1	2	1	1	2	2	1	2	2	2	2	2
Maximum	9	9	5	9	4	3	5	4	4	4	5	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	58	13	18	44	2		23	1	3	3	7	4
		Col %	18%	31%	18%	18%	11%		16%	11%	43%	27%	17%	31%
	Free-time package tours	Count	258	26	74	197	15		121	8	4	8	35	9
		Col %	79%	62%	76%	78%	79%		82%	89%	57%	73%	83%	59%
	Individually arranged travel	Count	7	3	4	7	2		1					
		Col %	2%	7%	4%	3%	11%		1%					
	Group tour	Count	2			1		2	2					
		Col %	1%			0%		100%	1%					
	Other	Count	1		1	1			1					
		Col %	0%		1%	0%			1%					
	Company paid travel	Count	1		1	1								
		Col %	0%		1%	0%								
Total	Count		327	42	98	251	19	2	148	9	7	11	42	13

# Travel Motivation Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Beautiful seas, beaches, tropical climate	67%	48%	54%	68%	63%	50%	74%	56%	29%	55%	67%	23%
Pleasure	63%	52%	56%	65%	58%		69%	78%		36%	69%	46%
Shopping	46%	36%	47%	49%	58%		46%	44%	14%	45%	43%	23%
Short travel time	41%	48%	49%	42%	58%		29%	22%	14%	36%	38%	38%
Price of the tour package	39%	36%	38%	40%	26%	50%	43%	22%	14%	9%	38%	31%
Just to relax	35%	38%	40%	36%	47%		24%	33%		36%	24%	46%
Water sports	28%	12%	23%	27%	21%		29%	11%	14%	9%	40%	8%
A previous visit	20%	43%	68%	22%	37%		9%	56%	43%	9%	17%	46%
Recommendation of friend, relative, travel agency	24%	10%	13%	23%	16%	50%	32%	11%		9%	19%	15%
It is a safe place to spend a vacation	14%	21%	18%	14%	26%		7%	11%		9%	10%	23%
SCUBA diving	4%		3%	4%			7%				29%	
Honeymoon	3%	5%	1%	3%			1%			100%	5%	
To get married or Attend wedding	2%	12%	4%	2%	11%				100%			23%
Other	2%	5%	4%	2%	5%		2%					
To visit friends or relatives	1%		1%	2%			2%				2%	
Promotional materials from GVB	1%		1%	1%			1%				2%	8%
Organized Sporting Activity	1%			2%			2%			9%		
Company or Business trip	1%		1%	1%			1%					
Special promotion	0%			0%			1%			9%		
Total Cases	327	42	98	251	19	2	148	9	7	11	42	13

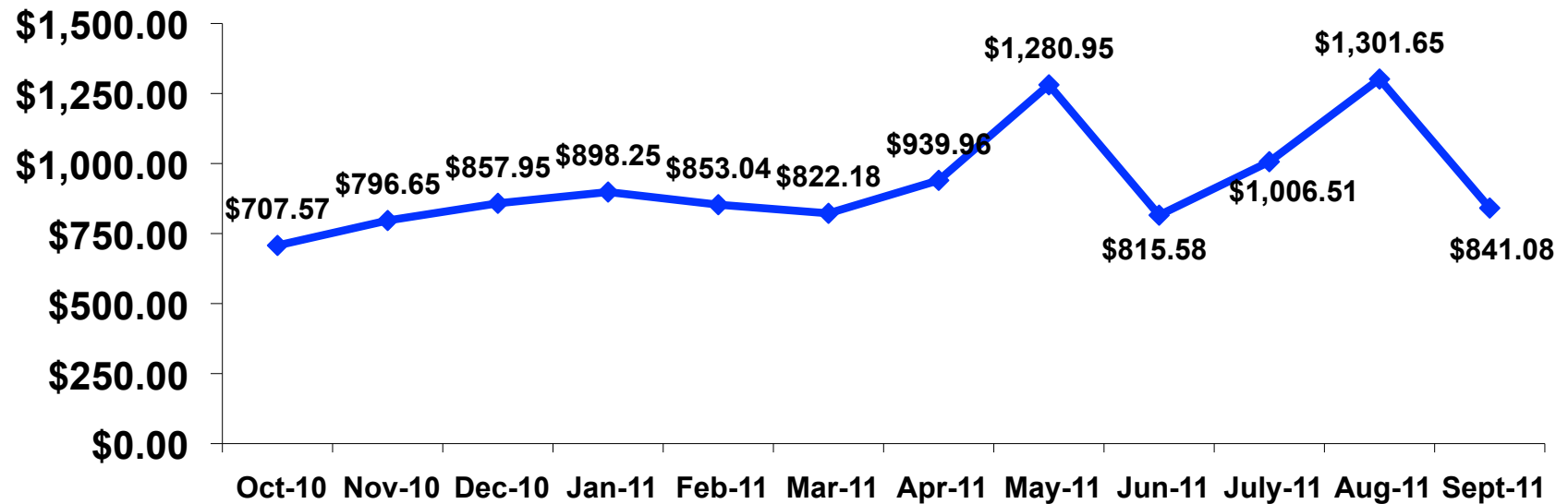
# Information Sources Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR	
Q.1													
Travel guide book at bookstores	71%	64%	65%	72%	61%	100%	68%	44%	57%	82%	76%	54%	
Internet	67%	79%	67%	68%	72%		68%	67%	100%	45%	80%	77%	
Travel agent brochure	54%	60%	53%	55%	56%	50%	55%	22%	57%	82%	54%	46%	
I have been to Guam before	29%	55%	95%	31%	50%		16%	44%	57%	9%	27%	54%	
Magazine	28%	33%	24%	28%	33%	50%	37%	44%	43%	18%	27%	23%	
Friend or relative	27%	17%	15%	27%	28%		36%	22%	29%	18%	29%	15%	
TV	10%	10%	9%	10%	11%		14%		29%		15%	8%	
Company travel department	2%	2%	2%	3%	6%		1%				5%		
GVB promotional activities	2%	2%	6%	2%	6%		1%						
GVB office	1%			2%			2%				7%		
Newspaper	1%			1%			1%				2%		
Total	Cases	321	42	98	247	18	2	146	9	7	11	41	13

SECTION 3  
**EXPENDITURES**

# Prepaid Expenditures Tracking

YTD=\$926.56

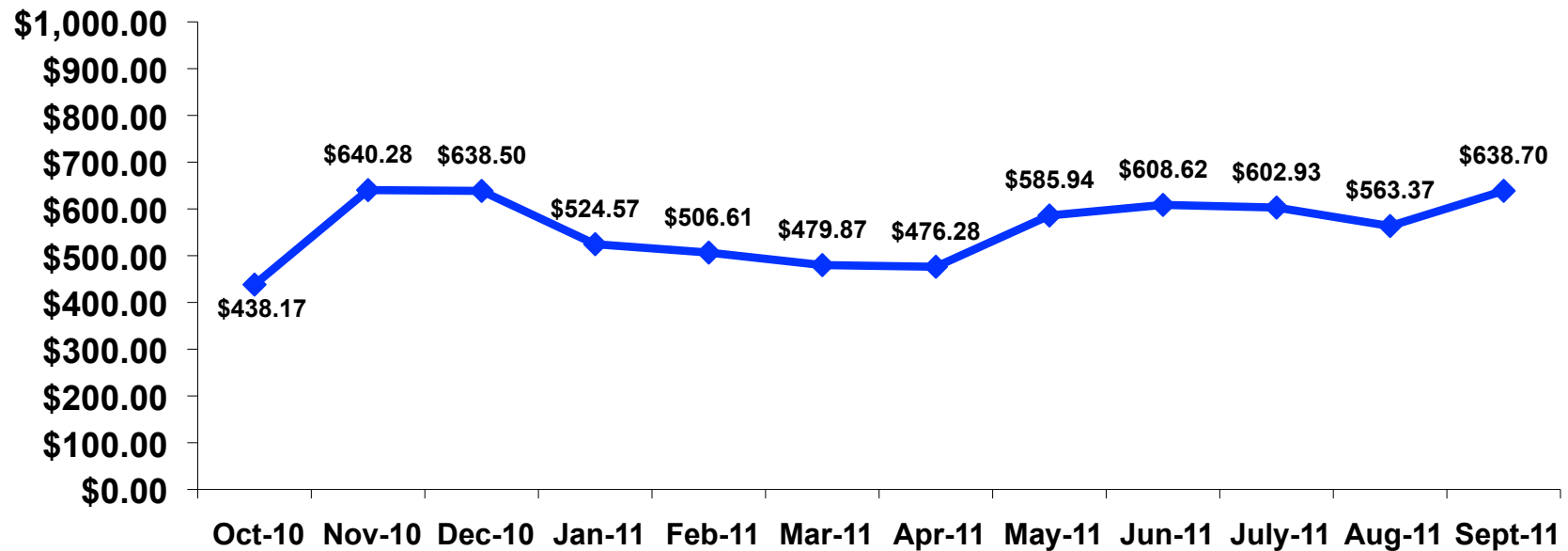


# Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid	Mean	\$841.08	\$958.66	\$865.74	\$852.09	\$856.53	\$497.51	\$711.70	\$1,033.72	\$1,035.20	\$1,532.18	\$845.93	\$1,037.95
per	Median	\$779	\$865	\$808	\$779	\$831	\$498	\$681	\$960	\$1,082	\$1,168	\$779	\$1,082
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$475.88	\$0.00	\$648.93	\$0.00	\$306.29	\$0.00	\$0.00
converted to \$	Maximum	\$4,282.93	\$4,282.93	\$4,282.93	\$4,282.93	\$1,622.32	\$519.14	\$1,453.60	\$1,860.26	\$1,622.32	\$4,282.93	\$2,595.72	\$1,622.32

# On-Island Expenditures Tracking

YTD = \$558.53



# 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	\$638.70	\$600.22	\$737.05	\$649.48	\$579.95	\$625.00	\$536.80	\$930.00	\$473.56	\$714.56	\$764.81	\$589.67
	Median	\$500	\$391	\$475	\$500	\$483	\$625	\$500	\$600	\$250	\$550	\$500	\$475
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00	\$600.00	\$0.00	\$350.00	\$111.33	\$0.00	\$110.00	\$0.00
	Maximum	\$8,000.00	\$2,840.00	\$8,000.00	\$8,000.00	\$1,347.00	\$650.00	\$2,100.00	\$2,840.00	\$1,280.00	\$2,500.00	\$2,100.00	\$2,000.00

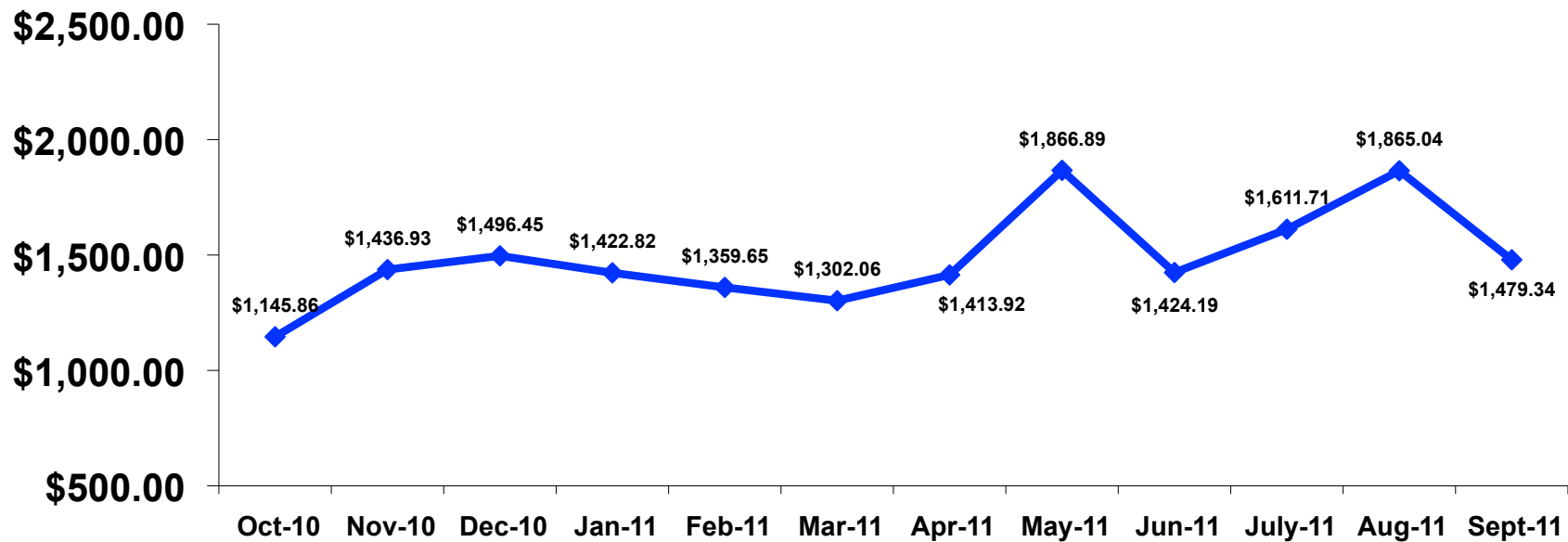


# On-Island Expense Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$25.84	\$81.43	\$34.95	\$28.77	\$71.16	\$15.00	\$14.33	\$61.67	\$174.86	\$57.50	\$15.71	\$86.46
	Median	\$0.00	\$2.00	\$0.00	\$0.00	\$0.00	\$15.00	\$0.00	\$0.00	\$20.00	\$0.00	\$0.00	\$4.00
F&B-FF REST/CONV	Mean	\$32.02	\$39.00	\$39.46	\$35.30	\$34.58	\$25.00	\$24.49	\$42.00	\$90.00	\$60.00	\$23.07	\$64.62
	Median	\$15.00	\$20.00	\$20.00	\$16.00	\$30.00	\$25.00	\$10.00	\$20.00	\$50.00	\$25.00	\$7.00	\$30.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$82.29	\$147.62	\$90.41	\$84.63	\$88.16	\$35.00	\$53.96	\$63.89	\$42.86	\$322.00	\$72.52	\$76.92
	Median	\$50.00	\$45.00	\$50.00	\$50.00	\$50.00	\$35.00	\$35.50	\$0.00	\$0.00	\$110.00	\$10.00	\$50.00
OPTIONAL TOUR	Mean	\$97.41	\$103.10	\$95.13	\$97.29	\$87.11	\$65.00	\$69.91	\$112.22	\$274.29	\$104.00	\$147.02	\$80.77
	Median	\$32.50	\$0.00	\$15.00	\$20.00	\$55.00	\$65.00	\$35.00	\$160.00	\$0.00	\$50.00	\$92.50	\$0.00
GIFT/ SOUV-SELF	Mean	\$297.85	\$553.57	\$423.72	\$329.00	\$350.53	\$350.00	\$188.75	\$1,173.33	\$521.43	\$665.00	\$262.38	\$350.00
	Median	\$100.00	\$50.00	\$100.00	\$100.00	\$200.00	\$350.00	\$60.00	\$300.00	\$50.00	\$325.00	\$35.00	\$50.00
GIFT/ SOUV- F&F AT HOME	Mean	\$142.67	\$234.05	\$192.34	\$154.76	\$341.32	\$100.00	\$96.23	\$53.33	\$535.71	\$355.00	\$110.48	\$359.23
	Median	\$65.00	\$100.00	\$100.00	\$80.00	\$100.00	\$100.00	\$50.00	\$30.00	\$200.00	\$175.00	\$80.00	\$100.00
LOCAL TRANS	Mean	\$13.05	\$20.95	\$14.11	\$14.98	\$21.21	\$35.00	\$8.10	\$18.00	\$7.14	\$0.00	\$16.93	\$8.46
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$231.92	\$696.33	\$290.96	\$223.13	\$192.26	\$0.00	\$133.81	\$186.67	\$295.71	\$775.20	\$308.60	\$795.38
	Median	\$0.00	\$145.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$145.00	\$0.00	\$127.50	\$155.50	\$0.00

# Total Expenditures Tracking

YTD=\$1,485.06



# Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Total per person expense	Mean	\$1,479.34	\$1,550.04	\$1,599.39	\$1,500.40	\$1,393.94	\$1,122.51	\$1,248.50	\$1,963.72	\$1,410.90	\$2,246.74	\$1,610.74	\$1,621.66
	Median	\$1,323.39	\$1,349.75	\$1,348.93	\$1,328.72	\$1,296.27	\$1,122.51	\$1,191.96	\$1,518.07	\$1,435.26	\$1,573.39	\$1,326.05	\$1,343.61
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00	\$1,119.14	\$0.00	\$1,300.84	\$150.00	\$306.29	\$707.01	\$0.00
	Maximum	\$9,287.48	\$5,282.93	\$9,287.48	\$9,287.48	\$2,795.28	\$1,125.88	\$3,168.07	\$4,700.26	\$2,448.07	\$5,282.93	\$3,595.72	\$3,470.91

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, June, July, Aug, Sep 2011, Overall Oct 2010 - Sep 2011**

	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Combined Oct 2010 - Sep 2011
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	2		2	3	1	4	3	3	2	2		2	3
Ease of getting around										4			6
Safety walking around at night		3	4										
Quality of daytime tours									4			3	4
Variety of daytime tours					3	2					3		
Quality of nighttime tours										5			
Variety of nighttime tours													
Quality of shopping		2	1			3		1	1	1	1	1	1
Variety of shopping	3			2	2								5
Price of things on Guam	1		3				1					4	7
Quality of hotel accommodations		1		1		1	2	2	3	3	2		2
% of Overall Satisfaction Accounted For	36.7%	36.0%	53.0%	41.1%	38.6%	57.6%	45.5%	38.5%	35.8%	40.5%	32.9%	51.9%	42.1%

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 four significant factors in the September 2011 Period. By rank order they are:
  - **Quality of shopping,**
  - **Cleanliness of beaches & parks,**
  - **Quality of daytime tours, and**
  - **Price of things on Guam.**
- With all four factors the overall  $r^2$  is .519 meaning that **51.9% of overall satisfaction is accounted for by these four factors.**

Comparison of Drivers of Per Person On Island Expenditure, Oct, Nov, Dec 2010, Jan, Feb, Mar, Apr, May, June, July, Aug, Sep 2011, Overall Oct 2010 - Sep 2011													
	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Combined Oct 2010 - Sep 2011
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks					1								3
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	1		1
Variety of shopping			1					1					
Price of things on Guam					2	1							
Quality of hotel accommodations											2		2
% of Overall Satisfaction Accounted For	4.0%	0.0%	2.2%	0.0%	0.9%	3.2%	0.0%	4.8%	2.5%	3.4%	5.3%	0.0%	2.0%

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 no significant factors in the September 2011 Period.