



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2012 MARKET SEGMENTATION –

SEPTEMBER 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 **329** 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 **329** 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

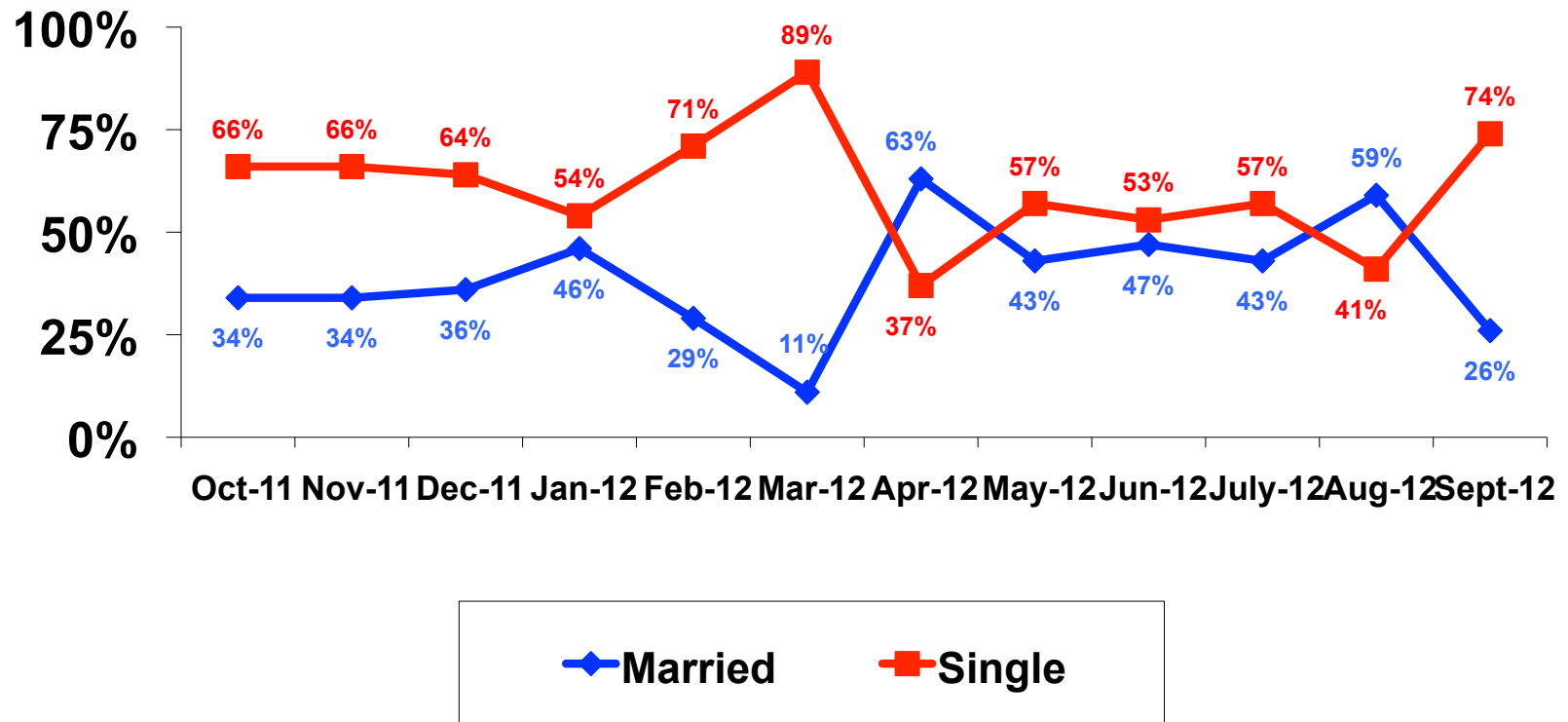
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.18/Q.19/Q.28
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

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%	20%	20%	46%	21%
Office Lady	14%	10%	11%	13%	7%	6%	8%	15%	11%	11%	10%	7%
Group	3%	2%	2%	3%	6%	4%	3%	2%	3%	4%	2%	2%
Silver	2%	2%	4%	2%	2%	1%	5%	5%	5%	3%	1%	2%
Wedding	4%	7%	4%	4%	3%	5%	10%	7%	12%	7%	4%	2%
Sport	67%	69%	58%	68%	68%	73%	64%	61%	60%	66%	69%	68%
18-35	77%	82%	69%	59%	79%	92%	47%	71%	66%	69%	47%	82%
36-55	19%	15%	27%	36%	18%	7%	46%	23%	25%	26%	48%	16%
Child	6%	7%	10%	17%	6%	3%	32%	10%	6%	10%	35%	9%
Honeymoon	6%	7%	5%	3%	4%	2%	4%	4%	8%	3%	2%	1%
Repeat	33%	36%	43%	47%	35%	22%	47%	38%	43%	42%	48%	27%
TOTAL	326	325	327	327	327	328	326	327	327	327	327	329

SECTION 1 **PROFILE OF RESPONDENTS**

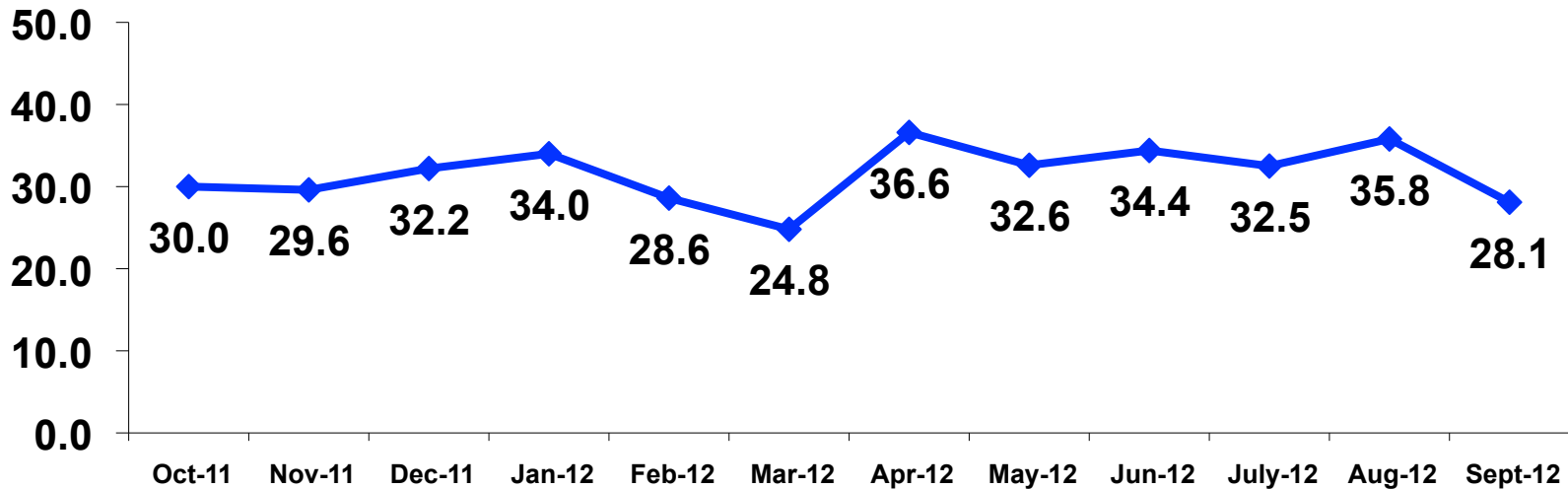
Marital Status Tracking



Marital Status Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT	
C. Married	Count	84	47	3	1	5	5	50	31	44	29	2	34
	Col %	26%	68%	13%	14%	83%	71%	22%	12%	86%	97%	100%	38%
Single	Count	245	22	21	6	1	2	173	237	7	1		55
	Col %	74%	32%	88%	86%	17%	29%	78%	88%	14%	3%		62%
Total	Count	329	69	24	7	6	7	223	268	51	30	2	89

Average Age Tracking



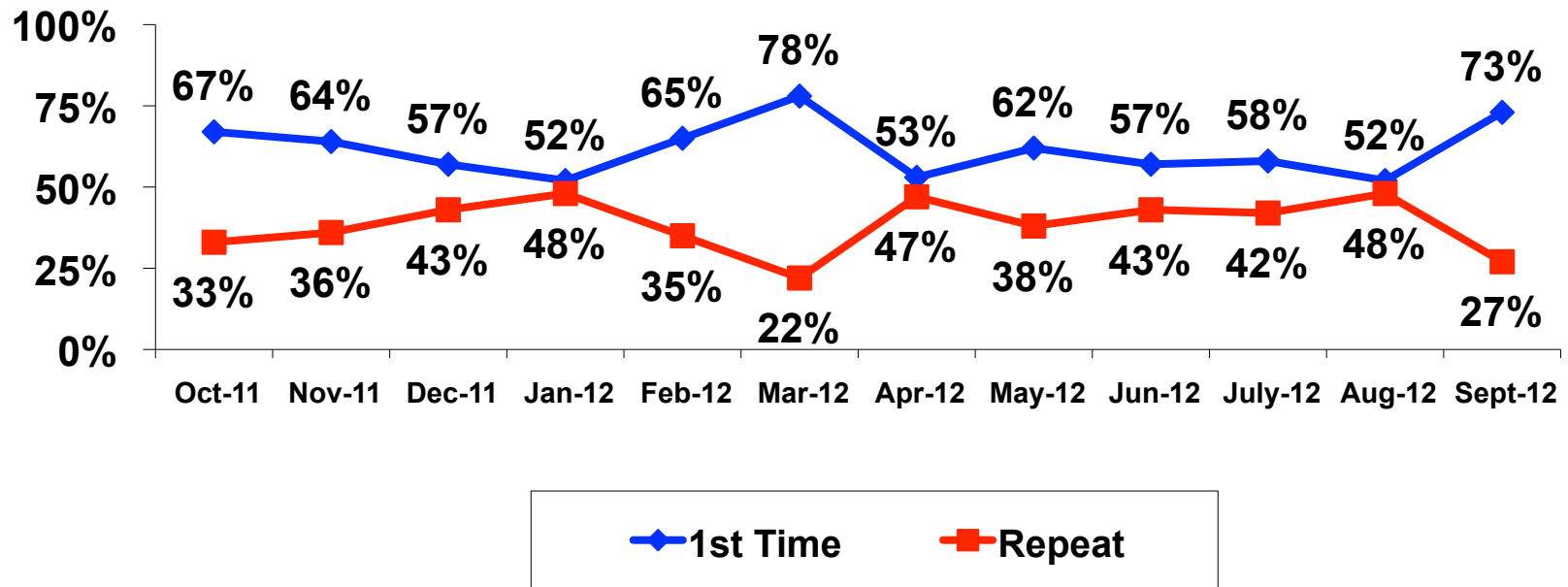
Age Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
D.	18-34	Count	261	26	19	6		2	190	261		2	1	57
		Col %	79%	38%	79%	86%		29%	85%	97%		7%	50%	64%
	35-54	Count	58	38	5	1		3	28	7	51	26	1	28
		Col %	18%	55%	21%	14%		43%	13%	3%	100%	87%	50%	31%
	55+	Count	10	5			6	2	5			2		4
		Col %	3%	7%			100%	29%	2%			7%		4%
Total	Count		329	69	24	7	6	7	223	268	51	30	2	89
D.	Mean		28.1	37.7	29.0	24.7	61.7	44.9	26.8	23.9	43.9	42.3	29.5	32.0
	Median		24	38	26	23	60	49	23	23	45	41	30	28

Income Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.31	Less than Y2	Count	20		1	2			10	19	1			1
	million	Col %	7%		5%	33%			5%	9%	2%			1%
	Y2,000,001 -	Count	24	2	5				21	24				8
	Y3,000,000	Col %	9%	3%	25%				11%	11%				10%
	Y3,000,001 -	Count	43	4	5	1	1	1	33	39	2		1	9
	Y4,000,000	Col %	16%	7%	25%	17%	17%	20%	18%	18%	4%		50%	12%
	Y4,000,001 -	Count	28	7	2	1			19	24	4	4		7
	Y5,000,000	Col %	10%	12%	10%	17%			10%	11%	9%	14%		9%
	Y5,000,00 -	Count	48	17	4	1		1	31	33	14	6	1	16
	Y7,000,000	Col %	18%	29%	20%	17%		20%	17%	15%	30%	21%	50%	21%
	Y7,000,001 -	Count	41	17	1	1	1	1	28	22	17	11		12
	Y10,000,000	Col %	15%	29%	5%	17%	17%	20%	15%	10%	37%	38%		15%
	Y10,000,001	Count	56	11	2		3	1	34	44	8	7		21
	or more	Col %	21%	19%	10%		50%	20%	19%	20%	17%	24%		27%
	No Income	Count	11	1			1	1	7	10		1		4
		Col %	4%	2%			17%	20%	4%	5%		3%		5%
Total	Count		271	59	20	6	6	5	183	215	46	29	2	78

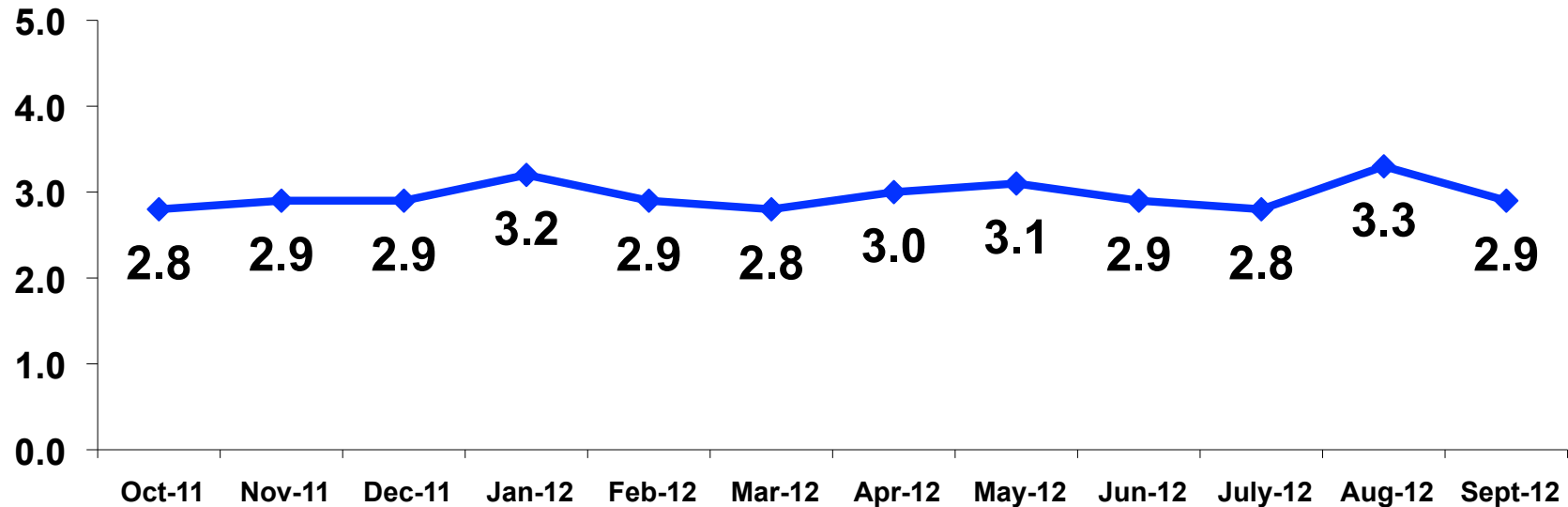
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.3A Yes	Count		240	37	12	5	4	7	168	208	26	11	2	
	Col %		73%	54%	50%	71%	67%	100%	75%	78%	51%	37%	100%	
No	Count		89	32	12	2	2		55	60	25	19		89
	Col %		27%	46%	50%	29%	33%		25%	22%	49%	63%		100%
Total	Count		329	69	24	7	6	7	223	268	51	30	2	89

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	2.9	2.6	2.6	3.0	3.1	2.9	2.8	3.1	3.0	3.5	2.9
Median	3	3	2	2	3	3	3	3	3	3	4	3
Minimum	1	2	2	2	3	3	1	1	2	2	3	2
Maximum	5	5	5	4	3	4	5	5	5	5	4	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	86	20	4		4	3	61	70	10	8		20
		Col %	26%	29%	17%		67%	43%	27%	26%	20%	27%		22%
	Free-time package tours	Count	224	43	18		1	3	148	184	37	19	2	61
		Col %	68%	62%	75%		17%	43%	66%	69%	73%	63%	100%	69%
	Individually arranged travel	Count	11	5	1		1	1	7	8	2	2		5
		Col %	3%	7%	4%		17%	14%	3%	3%	4%	7%		6%
	Group tour	Count	7	1	1	7			6	6	1	1		2
		Col %	2%	1%	4%	100%			3%	2%	2%	3%		2%
	Other	Count	1						1		1			1
		Col %	0%						0%		2%			1%
Total	Count		329	69	24	7	6	7	223	268	51	30	2	89

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	65%	57%	71%	71%	33%	43%	70%	68%	57%	60%	50%	58%
Pleasure	59%	58%	63%	57%	50%	14%	61%	61%	51%	60%	100%	50%
Short travel time	46%	62%	58%	43%	33%	43%	44%	43%	61%	70%	100%	56%
Just to relax	37%	38%	42%	14%	33%	29%	39%	36%	43%	40%		44%
Shopping	37%	35%	38%	29%	50%	29%	41%	40%	24%	27%	50%	44%
Price of the tour package	33%	41%	33%	29%			35%	33%	37%	43%	50%	36%
Water sports	28%	12%	25%	29%	17%		41%	31%	12%	13%		21%
A previous visit	20%	38%	33%	14%	33%		19%	17%	35%	53%		75%
Recommendation of friend, relative, travel agency	26%	17%	25%	14%	17%	14%	28%	27%	24%	10%		10%
It is a safe place to spend a vacation	16%	23%	29%	14%	33%		16%	15%	18%	27%		16%
SCUBA diving	6%	6%	4%	14%			9%	6%	6%			2%
Other	4%	1%				14%	4%	4%				3%
To get married or Attend wedding	2%	7%			33%	100%	2%	1%	6%	3%		
Special promotion	2%		4%				1%	1%	2%	3%		1%
Organized Sporting Activity	1%	1%					2%	1%	4%	3%		
My company sponsored me	1%	1%					1%	1%	2%			1%
To visit friends or relatives	1%						1%	1%				
Promotional materials from GVB	1%						1%	1%				1%
Career certification or testing	1%						1%	1%				1%
Honeymoon	1%						0%	1%			100%	
To golf	0%				17%		0%					1%
Total Cases	329	69	24	7	6	7	223	268	51	30	2	89

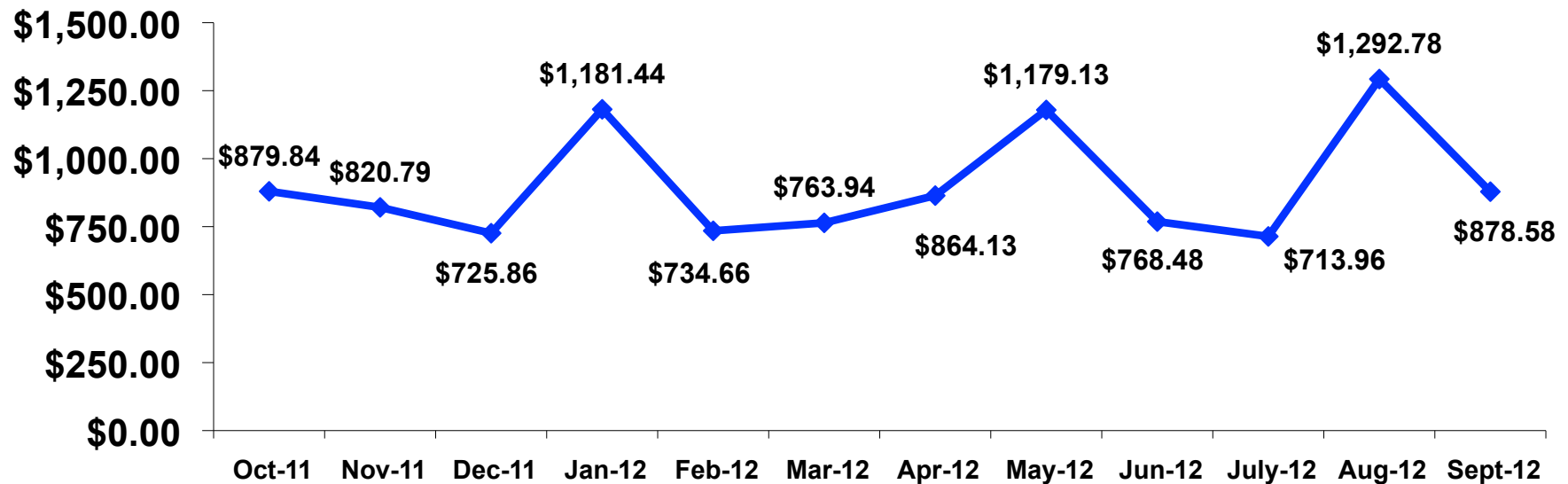
Information Sources Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT	
Q.1													
Travel guide book at bookstores	69%	65%	67%	43%	67%	71%	71%	69%	69%	70%	100%	70%	
Internet	58%	59%	71%	71%	33%	71%	60%	59%	59%	53%		53%	
Travel agent brochure	47%	36%	50%	57%	33%	43%	51%	48%	45%	40%	100%	45%	
Magazine	29%	20%	29%	43%	17%	29%	28%	30%	24%	20%		20%	
I have been to Guam before	20%	38%	38%	14%	33%		18%	17%	35%	53%		75%	
Friend or relative	27%	13%	17%	14%		14%	30%	29%	16%	7%		17%	
TV	10%	9%	8%	14%	33%	14%	9%	9%	12%	10%		3%	
Company travel department	3%	1%	4%				4%	3%	2%	3%		1%	
Newspaper	2%	1%	4%				2%	1%	2%			1%	
GVB promotional activities	1%						2%	1%				1%	
Other	1%	1%					1%	1%	2%	3%			
GVB office	0%						0%		2%				
Total	Cases	328	69	24	7	6	7	223	267	51	30	2	89

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

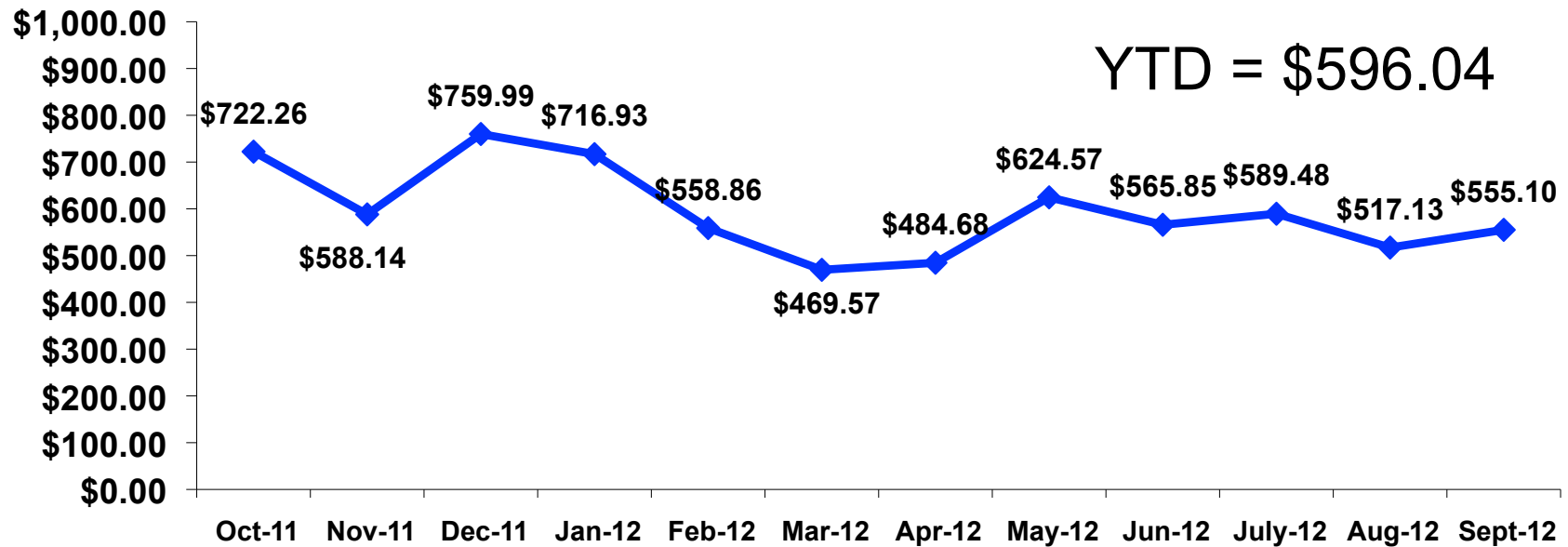
YTD=\$900.31



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Prepaid	Mean	\$878.58	\$944.46	\$878.31	\$736.66	\$1,392.29	\$1,318.54	\$892.22	\$851.40	\$920.92	\$934.79	\$1,277.47	\$907.85
per	Median	\$856	\$894	\$830	\$704	\$1,214	\$1,277	\$881	\$830	\$894	\$958	\$1,277	\$894
person	Minimum	\$0.00	\$0.00	\$510.99	\$415.18	\$670.67	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$958.10	\$0.00
converted to \$	Maximum	\$2,573.18	\$2,573.18	\$1,532.96	\$1,021.97	\$2,573.18	\$2,573.18	\$2,395.25	\$2,395.25	\$2,235.56	\$2,573.18	\$1,596.83	\$2,395.25

On-Island Expenditures Tracking



On-Island Expenditures Per Person Segmentation

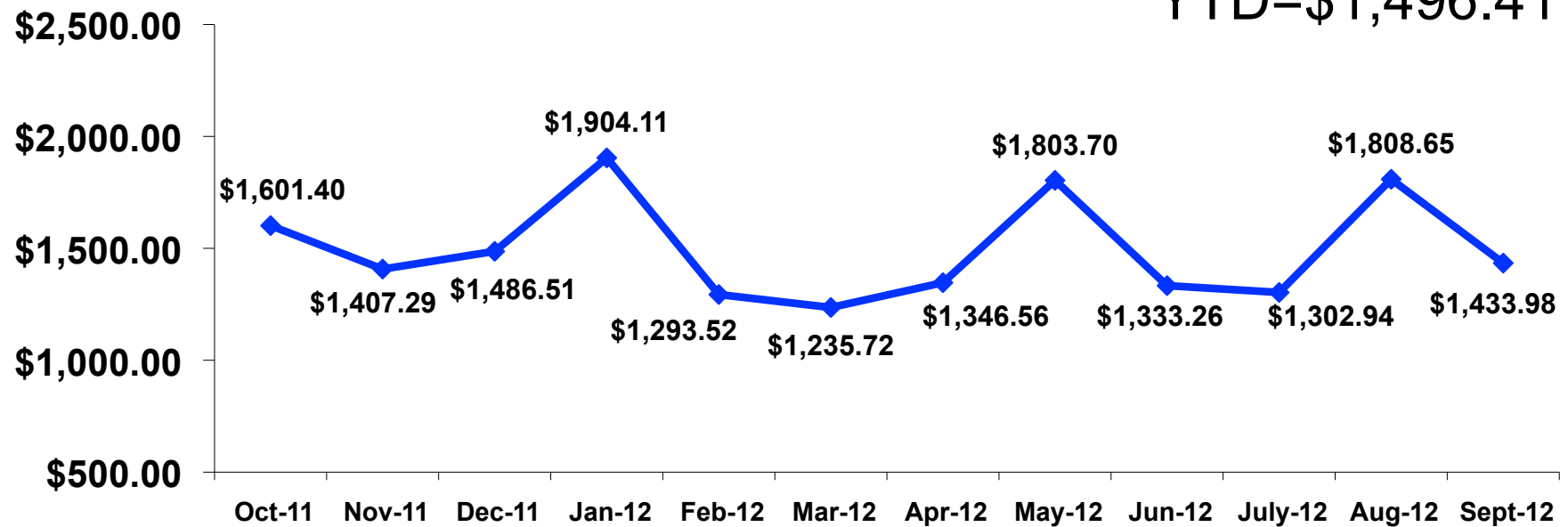
	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Per Person on-island exp												
Mean	\$555.10	\$375.76	\$435.02	\$300.00	\$559.83	\$350.00	\$615.15	\$592.44	\$364.26	\$300.88	\$977.25	\$530.74
Median	\$400	\$316	\$341	\$250	\$355	\$250	\$450	\$429	\$300	\$258	\$977	\$360
Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00	\$50.00	\$0.00	\$0.00	\$0.00	\$75.00	\$454.50	\$0.00
Maximum	\$5,200.00	\$2,045.00	\$1,400.00	\$800.00	\$1,800.00	\$750.00	\$5,200.00	\$5,200.00	\$1,400.00	\$1,000.00	\$1,500.00	\$3,150.00

On-Island Expense Breakdown

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
F&B-HOTEL	Mean	\$24.46	\$40.33	\$9.58	\$30.00	\$28.33	\$28.71	\$22.97	\$17.53	\$58.80	\$73.83	\$102.00	\$29.90
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$30.00	\$50.00	\$102.00	\$0.00
F&B-FF REST/CONV	Mean	\$26.66	\$41.38	\$15.50	\$13.57	\$25.00	\$2.14	\$23.79	\$21.80	\$52.92	\$69.33	\$167.50	\$32.09
	Median	\$10.00	\$15.00	\$6.00	\$5.00	\$0.00	\$0.00	\$10.00	\$7.50	\$20.00	\$45.00	\$167.50	\$10.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$64.74	\$104.13	\$49.67	\$21.43	\$0.00	\$12.14	\$61.39	\$56.18	\$120.49	\$150.33	\$215.00	\$85.58
	Median	\$25.00	\$50.00	\$27.50	\$0.00	\$0.00	\$0.00	\$30.00	\$20.00	\$60.00	\$90.00	\$215.00	\$50.00
OPTIONAL TOUR	Mean	\$112.38	\$110.78	\$41.25	\$628.57	\$146.67	\$0.00	\$142.46	\$106.06	\$132.75	\$94.00	\$125.00	\$115.92
	Median	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	\$60.00	\$0.00	\$0.00	\$0.00	\$125.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$198.73	\$175.39	\$103.75	\$47.14	\$66.67	\$1.43	\$221.12	\$206.42	\$183.69	\$213.33	\$781.00	\$195.76
	Median	\$60.00	\$100.00	\$35.00	\$30.00	\$0.00	\$0.00	\$72.50	\$60.00	\$100.00	\$100.00	\$781.00	\$100.00
GIFT/SOUV- F&F AT HOME	Mean	\$114.78	\$170.28	\$97.50	\$15.71	\$130.00	\$21.43	\$120.39	\$106.71	\$155.59	\$165.00	\$69.00	\$144.38
	Median	\$50.00	\$80.00	\$50.00	\$0.00	\$0.00	\$0.00	\$50.00	\$52.00	\$50.00	\$65.00	\$69.00	\$50.00
LOCAL TRANS	Mean	\$15.05	\$12.39	\$7.29	\$2.86	\$4.00	\$2.71	\$14.50	\$15.74	\$13.90	\$21.13	\$0.00	\$15.02
	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	\$190.48	\$194.46	\$221.65	\$112.14	\$343.33	\$588.57	\$190.22	\$187.24	\$184.82	\$192.00	\$495.00	\$165.37
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$265.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$495.00	\$0.00

Total Expenditures Tracking

YTD=\$1,496.41



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	\$1,433.98	\$1,320.22	\$1,313.33	\$1,031.69	\$1,952.12	\$1,668.54	\$1,507.93	\$1,444.00	\$1,285.18	\$1,235.67	\$2,254.72	\$1,433.74
	Median	\$1,328.73	\$1,327.56	\$1,321.97	\$1,055.31	\$1,415.59	\$1,527.47	\$1,358.64	\$1,322.29	\$1,233.10	\$1,169.27	\$2,254.72	\$1,323.96
	Minimum	\$0.00	\$0.00	\$510.99	\$638.73	\$1,125.67	\$250.00	\$0.00	\$0.00	\$0.00	\$90.00	\$1,412.60	\$0.00
	Maximum	\$5,838.73	\$3,073.18	\$2,166.48	\$1,321.97	\$3,332.96	\$3,073.18	\$5,838.73	\$5,838.73	\$2,610.56	\$3,073.18	\$3,096.83	\$4,682.96

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, June, July, Aug, Sept 2012 and Overall Oct 2011 - Sept 2012													
	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sept-12	Combined Oct 2011-Sept 2012
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	2	2	1	1	3	2	2			4	3	3
Ease of getting around	6		6					5					6
Safety walking around at night													7
Quality of daytime tours			5		4		3	3	3	1			4
Variety of daytime tours	2										3		
Quality of nighttime tours													
Variety of nighttime tours													9
Quality of shopping	4	1	7		2	2	4		1	2		2	1
Variety of shopping			1	2				6			1		8
Price of things on Guam	1	4	4					1					5
Quality of hotel accommodations	5	3	3	3	3	1	1	4	2	3	2	1	2
% of Overall Satisfaction Accounted For	49.9%	46.6%	50.2%	43.1%	43.9%	39.4%	46.2%	53.9%	49.6%	41.7%	46.1%	38.8%	45.8%

NOTE: Only significant variables are ranked.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by three significant factors in the September 2012 Period. By rank order they are:
 - **Quality of hotel accommodations,**
 - **Quality of shopping, and**
 - **Cleanliness of beaches and parks.**
- With all three factors the overall r^2 is .388 meaning that **38.8% of overall satisfaction is accounted for by these three factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2011, and Jan, Feb, Mar, Apr, May, June, July, Aug, Sept 2012 and Overall Oct 2011 - September 2012													
	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sept-12	Combined Oct 2011 - Sep 2012
Independent Variables:	rank	rank	rank	rank	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						1		1	
Quality of nighttime tours													
Variety of nighttime tours		2										2	2
Quality of shopping	1	1	1	2				1					1
Variety of shopping													4
Price of things on Guam									1				
Quality of hotel accommodations	2			1				2					3
% of Overall Satisfaction Accounted For	9.2%	8.1%	2.2%	4.8%	0.0%	2.5%	0.0%	5.7%	1.7%	2.6%	0.0%	6.8%	2.7%

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 September 2012 Period. They are:
 - **Variety of daytime tours, and**
 - **Variety of nighttime tours.**
- These factors have an r^2 of .068 meaning that **6.8% of per person on island expenditure is accounted for by these factors.**