



# **GUAM VISITORS BUREAU**

## **Japan Visitor Tracker Exit Profile**

### **FY2011 MARKET SEGMENTATION –**

### **JUNE 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

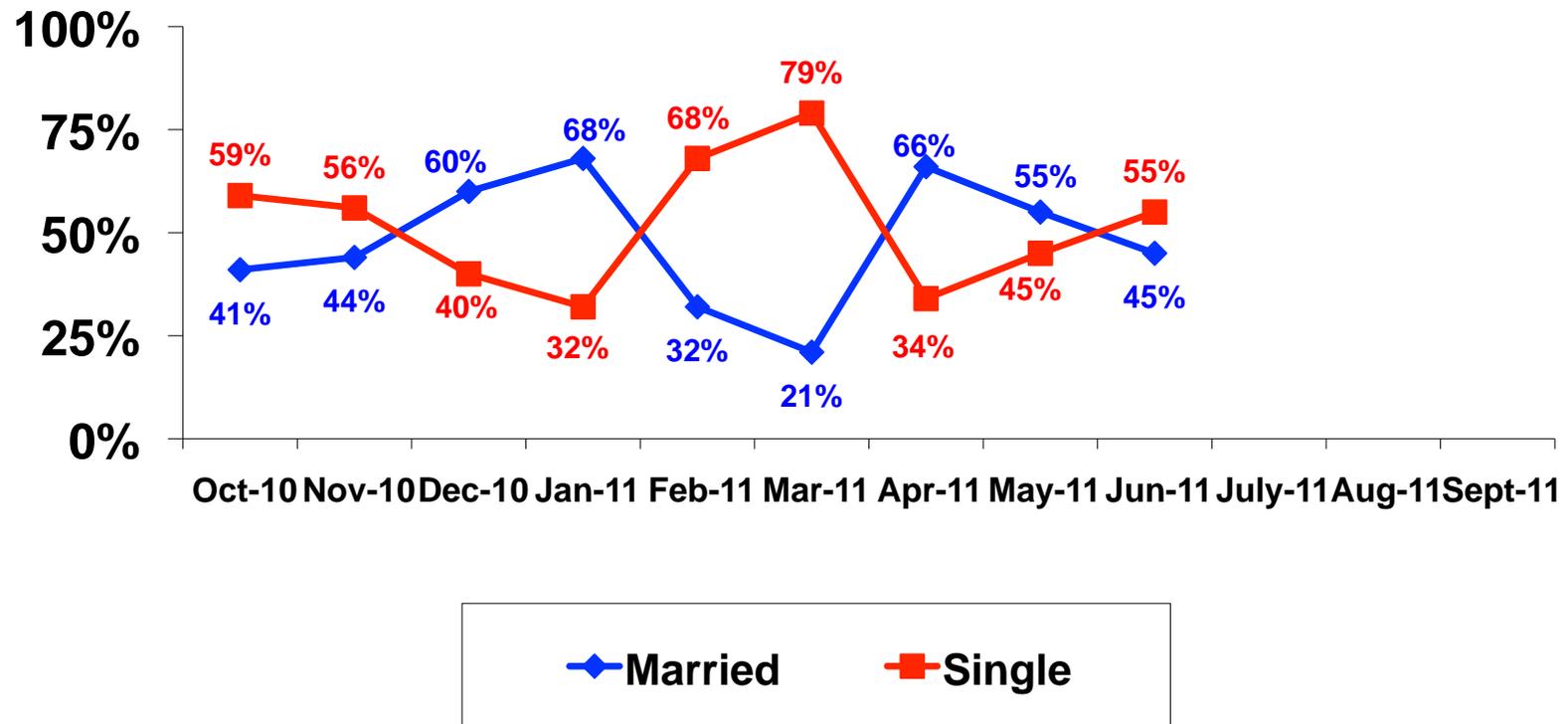
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

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

# SECTION 1 **PROFILE OF RESPONDENTS**

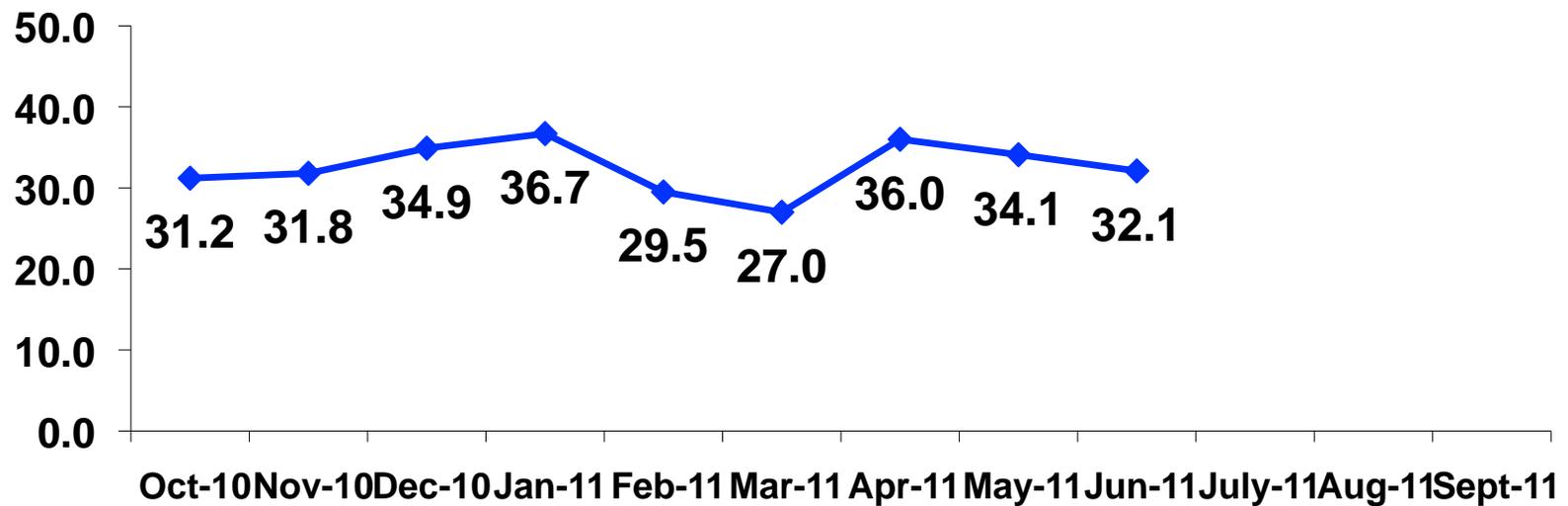
# Marital Status Tracking



# Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
C. Married	Count		148	51	63	111	7	4	1	8	19	34	14	23
	Col %		45%	77%	47%	43%	15%	31%	6%	62%	70%	100%	38%	96%
Single	Count		178	15	71	146	40	9	16	5	8		23	1
	Col %		55%	23%	53%	57%	85%	69%	94%	38%	30%		62%	4%
Total	Count		326	66	134	257	47	13	17	13	27	34	37	24

# Average Age Tracking



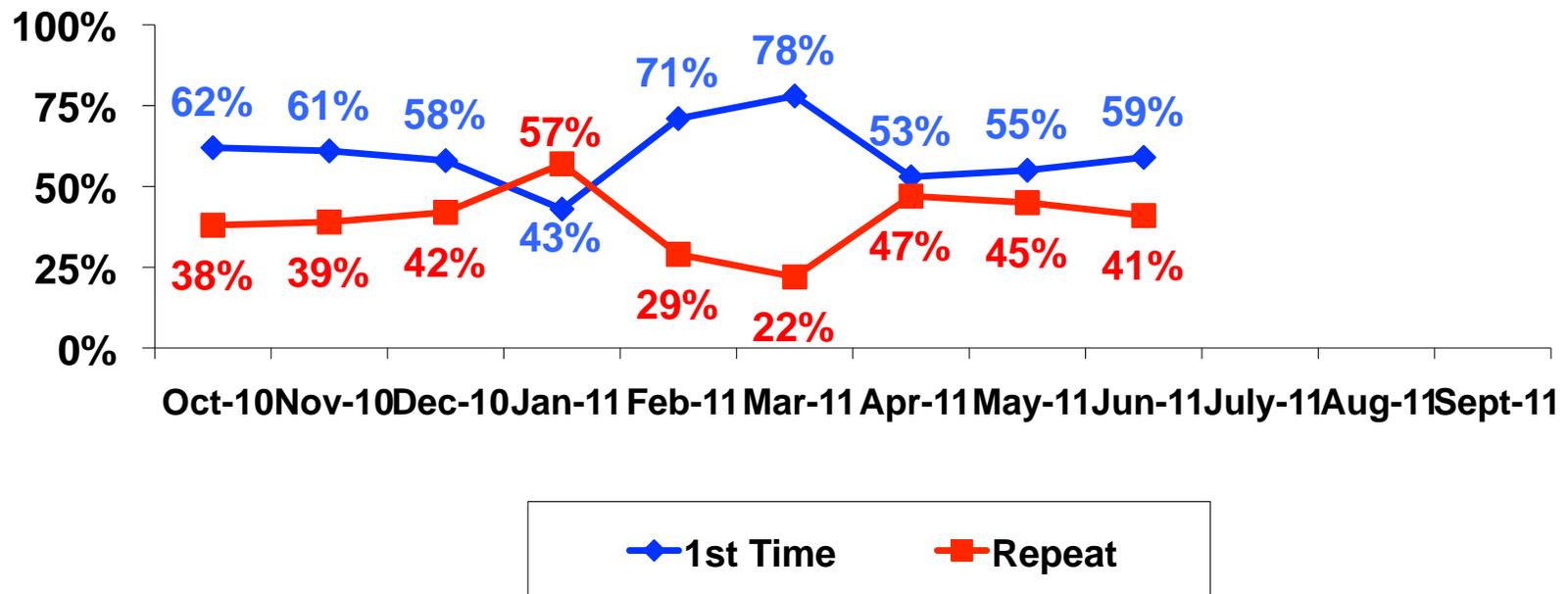
# Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	222	31	72	178	38	12	17	7	16	26	28	
		Col %	68%	47%	54%	69%	79%	92%	100%	54%	59%	76%	76%	
	35-54	Count	87	26	55	70	9	1		5	5	7	8	6
		Col %	27%	39%	41%	27%	19%	8%		38%	19%	21%	22%	25%
	55+	Count	18	9	7	10	1			1	6	1	1	18
		Col %	6%	14%	5%	4%	2%			8%	22%	3%	3%	75%
Total	Count		327	66	134	258	48	13	17	13	27	34	37	24
D.	Mean		32.1	37.5	34.4	31.5	28.3	28.2	20.4	37.3	36.9	30.0	30.7	58.2
	Median		29	36	34	29	27	26	20	34	32	28	29	59

# Income Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than Y2	Count	22	2	9	20	3	2	1	2	1	4	1
	million	Col %	8%	3%	7%	9%	7%	15%	14%	15%	4%	13%	5%
	Y2,000,001 -	Count	55	4	18	42	14	2		2	5	6	1
	Y3,000,000	Col %	19%	6%	15%	18%	32%	15%		8%	17%	19%	5%
	Y3,000,001 -	Count	42	8	16	33	8	2	1	3	2	5	5
	Y4,000,000	Col %	14%	13%	13%	14%	18%	15%	14%	23%	8%	17%	16%
	Y4,000,001 -	Count	43	10	10	35	3	3		1	6	8	3
	Y5,000,000	Col %	15%	16%	8%	15%	7%	23%		8%	23%	27%	10%
	Y5,000,00 -	Count	59	18	28	46	6	1	2	2	9	9	6
	Y7,000,000	Col %	20%	29%	23%	20%	14%	8%	29%	15%	35%	30%	19%
	Y7,000,001 -	Count	44	13	26	35	4	1		5	4	3	4
	Y10,000,000	Col %	15%	21%	21%	15%	9%	8%		38%	15%	10%	13%
	Y10,000,001	Count	25	7	13	19	6	2	1		2	3	5
	or more	Col %	9%	11%	11%	8%	14%	15%	14%	8%		10%	23%
	No Income	Count	3		1	2			2				
		Col %	1%		1%	1%			29%				
Total	Count		293	62	121	232	44	13	7	13	26	30	31

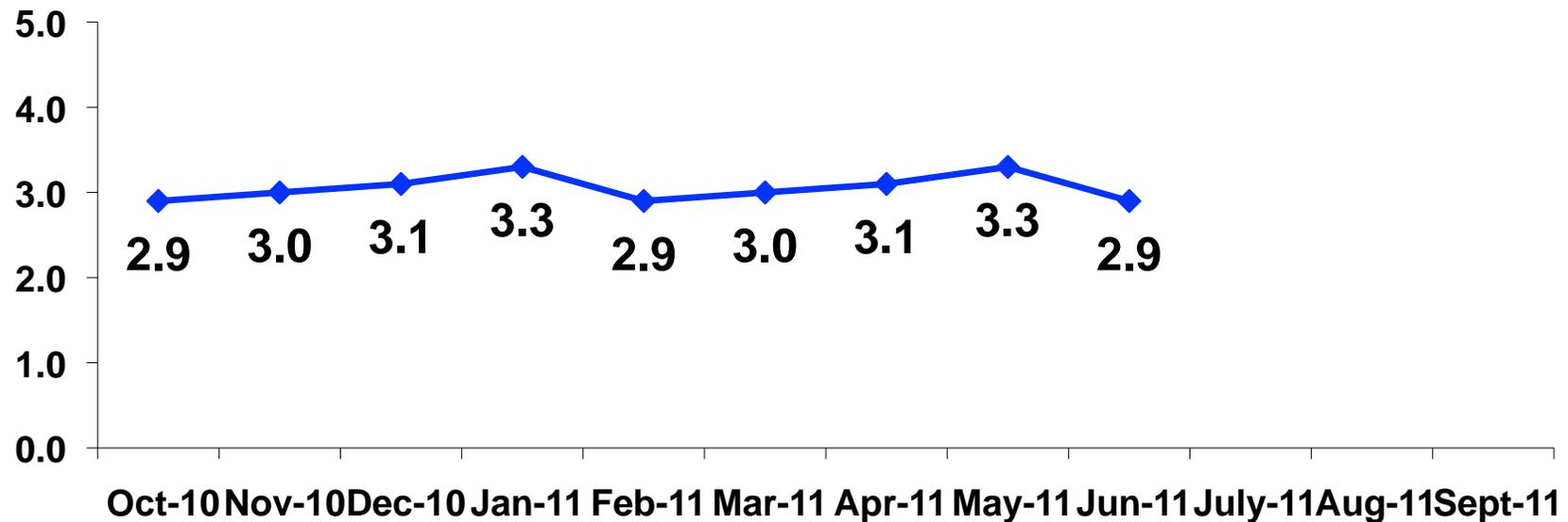
# Prior Trips to Guam Tracking



# Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		193	33		151	27	10	11	5	18	27	24	14
	Col %		59%	50%		59%	56%	77%	65%	38%	67%	79%	65%	58%
No	Count		134	33	134	107	21	3	6	8	9	7	13	10
	Col %		41%	50%	100%	41%	44%	23%	35%	62%	33%	21%	35%	42%
Total	Count		327	66	134	258	48	13	17	13	27	34	37	24

# 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	3.2	2.9	2.9	2.6	2.7	2.5	2.8	3.3	3.8	3.0	3.5
Median	3	3	3	3	3	3	2	3	3	4	3	3
Minimum	1	2	1	1	1	2	2	2	2	2	1	1
Maximum	10	10	8	10	4	4	4	4	8	8	10	10

# 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	73	21	26	55	12		4	2	10	14	10	5
		Col %	22%	32%	20%	21%	25%		25%	15%	37%	41%	27%	21%
	Free-time package tours	Count	217	38	93	172	34		12	10	14	19	25	16
		Col %	67%	58%	70%	67%	71%		75%	77%	52%	56%	68%	57%
	Individually arranged travel	Count	9	3	5	7	1						2	3
		Col %	3%	5%	4%	3%	2%				8%			5%
	Group tour	Count	13	2	3	11	1	13			2	1		
		Col %	4%	3%	2%	4%	2%	100%			7%	3%		
	Other	Count	3	2	2	2					1			
		Col %	1%	3%	2%	1%					4%			
	Company paid travel	Count	10		4	9								
		Col %	3%		3%	4%								
Total	Count	325	66	133	256	48	13	16	13	27	34	37	24	

# Travel Motivation Segmentation

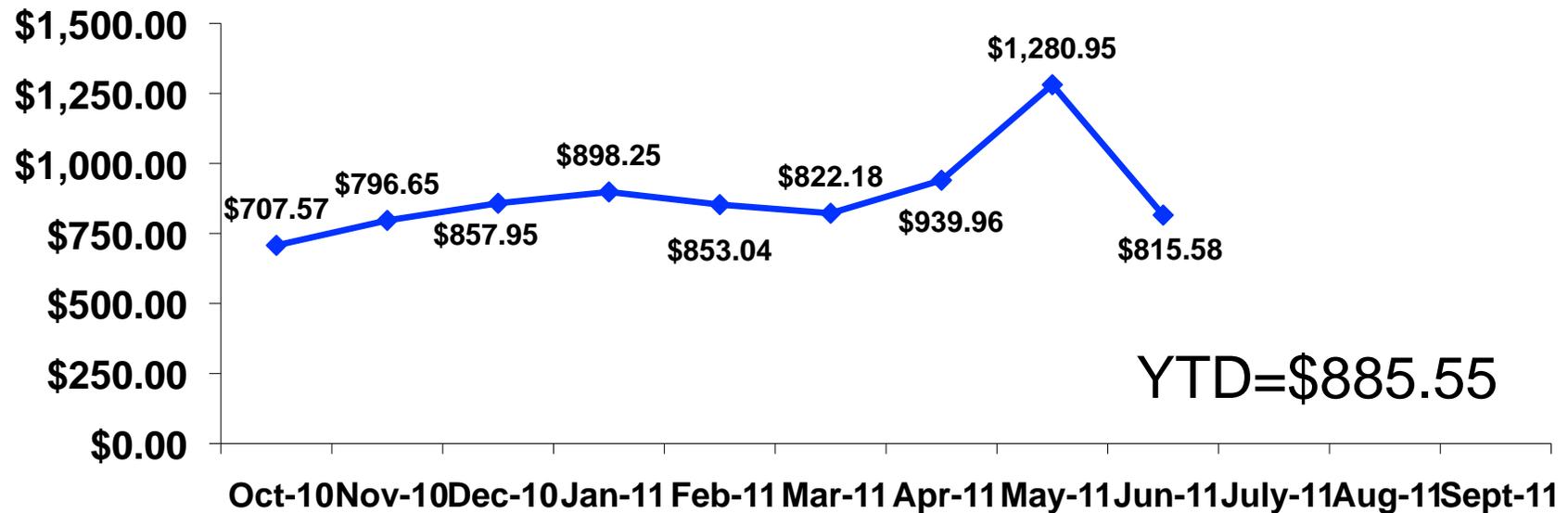
	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Beautiful seas, beaches, tropical climate	50%	35%	46%	52%	54%	17%	24%	38%	19%	44%	59%	25%
Pleasure	44%	42%	43%	47%	42%	17%	59%	15%	15%	24%	38%	13%
Short travel time	37%	41%	41%	39%	38%	17%	29%	15%	22%	29%	30%	42%
A previous visit	30%	41%	74%	30%	33%	25%	24%	54%	26%	15%	30%	29%
Shopping	32%	26%	32%	34%	46%	25%	41%	31%	7%	15%	30%	17%
Just to relax	30%	20%	34%	33%	25%	8%	24%	38%	7%	18%	27%	29%
Price of the tour package	25%	15%	28%	25%	27%		29%	31%	4%	6%	19%	13%
Recommendation of friend, relative, travel agency	20%	15%	9%	20%	29%	25%	24%	31%		12%	30%	17%
It is a safe place to spend a vacation	16%	20%	21%	16%	10%		6%	15%	7%	18%	19%	21%
Water sports	18%	11%	17%	17%	19%			8%	4%	21%	27%	
To get married or Attend wedding	8%	30%	7%	8%	10%	17%		15%	100%	15%	5%	29%
Honeymoon	10%	6%	5%	9%	4%	8%		8%	19%	100%	16%	4%
SCUBA diving	6%		7%	5%			18%			3%	24%	4%
Company or Business trip	6%		6%	6%	2%	17%		31%			3%	
Other	2%	3%	2%	3%			12%				3%	4%
My company sponsored me	2%	3%	1%	3%	6%	17%						
To golf	2%	2%	3%	1%				31%				8%
To visit friends or relatives	2%	3%	2%	1%							5%	8%
Organized Sporting Activity	1%	2%	1%	1%	2%						3%	
Special promotion	1%	2%		0%			6%					
Promotional materials from GVB	1%			1%	2%							
Career certification or testing	0%		1%	0%							3%	
Total Cases	326	66	134	257	48	12	17	13	27	34	37	24

# Information Sources Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR	
Q.1													
Travel guide book at bookstores	64%	68%	63%	62%	69%	54%	59%	85%	78%	76%	65%	63%	
Internet	61%	73%	63%	60%	63%	46%	71%	69%	59%	56%	54%	71%	
I have been to Guam before	40%	50%	99%	41%	42%	23%	29%	62%	33%	21%	35%	42%	
Travel agent brochure	43%	38%	36%	45%	46%	23%	53%	31%	56%	50%	41%	42%	
Magazine	20%	21%	16%	21%	19%	46%	35%	15%	26%	21%	11%	33%	
Friend or relative	20%	11%	6%	19%	17%	38%	18%	8%	11%	26%	22%	17%	
TV	8%	8%	5%	7%	4%	8%	6%		11%	3%	3%	17%	
Company travel department	6%	3%	3%	5%	13%	15%	6%	15%	7%	6%	5%	4%	
Newspaper	2%	3%	1%	2%					7%			13%	
GVB promotional activities	1%	5%	2%	1%					4%				
GVB office	1%	3%	1%	1%	4%						3%		
Other	1%		1%	1%	4%		6%				3%		
Total	Cases	327	66	134	258	48	13	17	13	27	34	37	24

SECTION 3  
**EXPENDITURES**

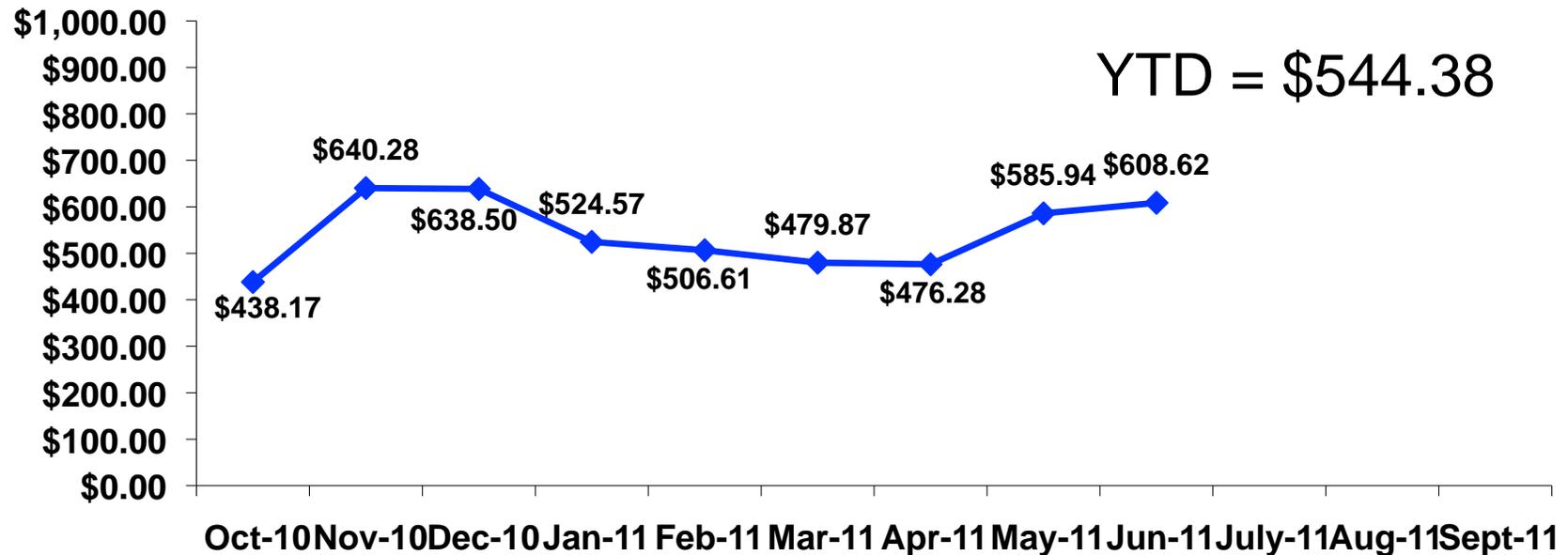
# Prepaid Expenditures Tracking



# Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid	Mean	\$815.58	\$883.16	\$727.78	\$797.29	\$725.79	\$635.36	\$676.47	\$800.98	\$1,260.29	\$1,386.19	\$977.51	\$1,373.66
per	Median	\$747	\$757	\$652	\$747	\$623	\$779	\$623	\$810	\$1,035	\$1,433	\$772	\$1,184
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$373.74	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
converted to \$	Maximum	\$4,235.70	\$3,861.97	\$3,861.97	\$3,861.97	\$2,242.43	\$1,557.24	\$1,245.80	\$1,370.37	\$3,861.97	\$3,239.07	\$2,699.22	\$3,861.97

# On-Island Expenditures Per Person Tracking



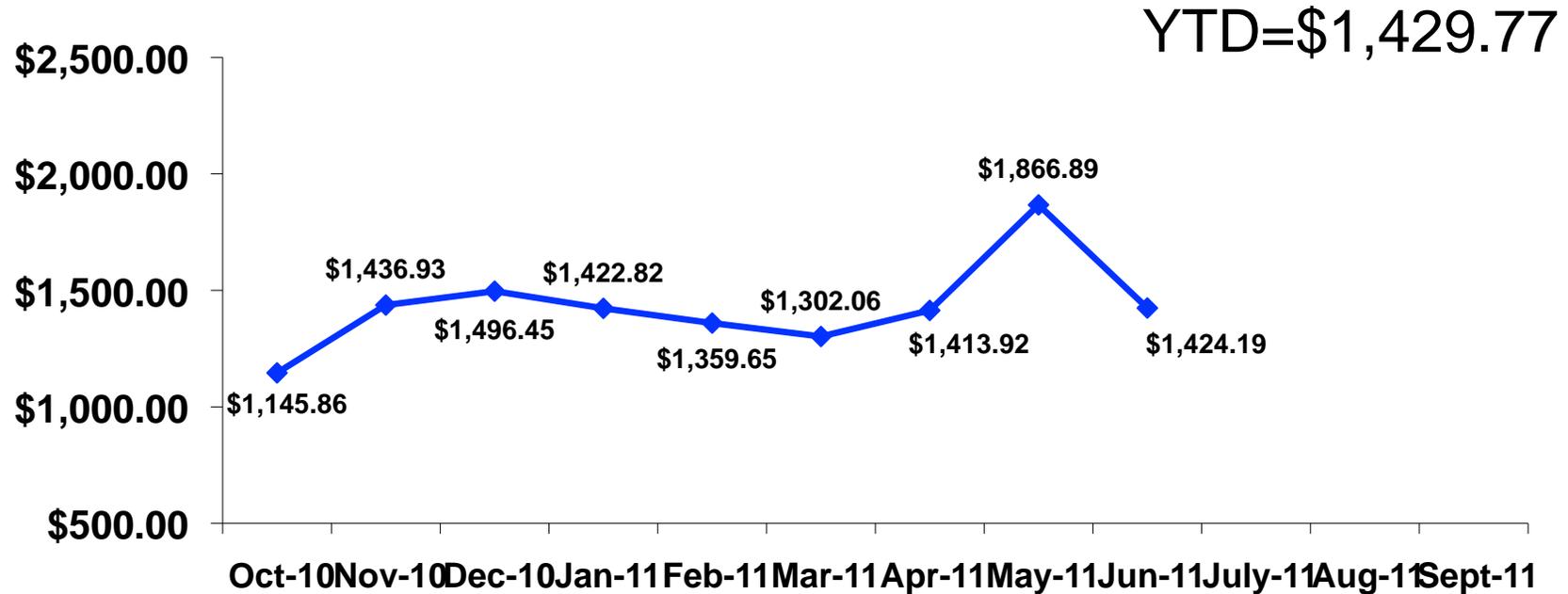
# On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$608.62	\$496.79	\$612.92	\$626.80	\$640.12	\$601.36	\$407.59	\$711.51	\$451.15	\$704.59	\$772.04	\$556.11
	Median	\$500	\$333	\$473	\$500	\$500	\$500	\$364	\$440	\$356	\$600	\$545	\$423
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$320.00	\$190.00	\$166.67	\$76.92	\$0.00	\$175.00	\$85.71
	Maximum	\$4,000.00	\$2,510.00	\$4,000.00	\$4,000.00	\$3,000.00	\$1,600.00	\$800.00	\$4,000.00	\$2,000.00	\$2,000.00	\$4,000.00	\$2,000.00

# On-Island Expenditures Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$30.61	\$71.35	\$31.09	\$32.00	\$24.29	\$24.62	\$8.82	\$27.69	\$42.26	\$66.47	\$26.76	\$61.50
	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
F&B-FF REST/CONV	Mean	\$32.16	\$41.12	\$39.56	\$31.70	\$18.35	\$26.77	\$13.59	\$32.69	\$27.96	\$63.24	\$19.00	\$35.21
	Median	\$10.00	\$10.50	\$20.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	\$2.00	\$10.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$76.09	\$86.47	\$79.15	\$76.72	\$40.77	\$62.08	\$8.82	\$48.46	\$107.00	\$151.47	\$64.97	\$140.42
	Median	\$20.00	\$50.00	\$30.00	\$20.00	\$5.00	\$0.00	\$0.00	\$0.00	\$50.00	\$0.00	\$10.00	\$100.00
OPTIONAL TOUR	Mean	\$88.61	\$96.52	\$80.90	\$81.47	\$40.42	\$67.69	\$22.24	\$107.69	\$72.59	\$157.53	\$162.65	\$100.21
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5.00	\$0.00	\$75.00	\$0.00	\$25.00	\$80.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$257.46	\$275.91	\$271.10	\$240.78	\$230.33	\$210.77	\$101.47	\$80.77	\$186.85	\$377.00	\$220.81	\$157.00
	Median	\$100.00	\$100.00	\$100.00	\$100.00	\$50.00	\$30.00	\$20.00	\$0.00	\$120.00	\$75.00	\$50.00	\$15.50
GIFT/SOUV- F&F AT HOME	Mean	\$127.67	\$170.06	\$126.13	\$132.66	\$88.31	\$176.54	\$39.41	\$79.23	\$148.41	\$216.76	\$152.57	\$189.54
	Median	\$50.00	\$100.00	\$84.50	\$50.00	\$50.00	\$200.00	\$0.00	\$100.00	\$100.00	\$100.00	\$50.00	\$100.00
LOCAL TRANS	Mean	\$13.02	\$14.62	\$13.96	\$13.04	\$8.75	\$4.85	\$6.94	\$6.15	\$7.30	\$4.18	\$7.03	\$23.17
	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	\$279.76	\$311.94	\$221.37	\$292.90	\$285.00	\$197.69	\$313.35	\$477.54	\$266.11	\$370.47	\$409.11	\$449.92
	Median	\$0.00	\$0.00	\$0.00	\$18.50	\$0.00	\$0.00	\$150.00	\$73.00	\$80.00	\$0.00	\$0.00	\$25.00

# Total Expenditures Tracking



# Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Total per person expense	Mean	\$1,424.19	\$1,379.95	\$1,340.70	\$1,424.09	\$1,365.91	\$1,236.71	\$1,084.06	\$1,512.50	\$1,711.44	\$2,090.78	\$1,749.55	\$1,929.78
	Median	\$1,272.90	\$1,229.87	\$1,190.91	\$1,297.41	\$1,297.41	\$1,346.64	\$1,022.90	\$1,434.35	\$1,445.80	\$1,980.77	\$1,446.47	\$1,627.78
	Minimum	\$175.00	\$200.00	\$200.00	\$175.00	\$300.00	\$430.00	\$738.15	\$400.00	\$200.00	\$175.00	\$175.00	\$581.93
	Maximum	\$4,622.90	\$4,158.26	\$4,622.90	\$4,622.90	\$3,622.90	\$2,347.48	\$2,045.80	\$4,622.90	\$4,061.97	\$4,055.56	\$4,622.90	\$4,158.26

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 2011, Overall Oct 2010 - June 2011**

	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Combined Oct 2010 - June 2011
Independent Variables:	rank	rank								
Cleanliness of beaches & parks	2		2	3	1	4	3	3	<b>2</b>	3
Ease of getting around										
Safety walking around at night		3	4							
Quality of daytime tours									<b>4</b>	4
Variety of daytime tours					3	2				
Quality of nighttime tours										
Variety of nighttime tours										
Quality of shopping		2	1			3		1	<b>1</b>	1
Variety of shopping	3			2	2					6
Price of things on Guam	1		3				1			5
Quality of hotel accommodations		1		1		1	2	2	<b>3</b>	2
% of Overall Satisfaction Accounted For	36.7%	36.0%	53.0%	41.1%	38.6%	57.6%	45.5%	38.5%	<b>35.8%</b>	42.2%

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 June 2011 Period. By rank order they are:
  - **Quality of shopping,**
  - **Cleanliness of beaches & parks,**
  - **Quality of hotel accommodations, and**
  - **Quality of daytime tours.**
- With all four factors the overall  $r^2$  is .358 meaning that **35.8% 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 2011, Overall Oct 2010 - June 2011**

	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Combined Oct 2010 - June 2011
Independent Variables:	rank	rank								
Cleanliness of beaches & parks					1					2
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			1					1		
Price of things on Guam					2	1				
Quality of hotel accommodations										
% of Overall Satisfaction Accounted For	4.0%	0.0%	2.2%	0.0%	0.9%	3.2%	0.0%	4.8%	<b>2.5%</b>	1.70%

NOTE: Only significant variables are ranked.

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# Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** of Japanese visitors on Guam is driven by one significant factor in the June 2011 Period. It is:
  - **Quality of shopping.**
- With this factor the overall  $r^2$  is .025 meaning that **2.5% of per person on island expenditure is accounted for by this factor.**