



**GUAM VISITORS BUREAU  
Japan Visitor Tracker Exit Profile  
FY2011 MARKET SEGMENTATION –  
MARCH 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 **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.

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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

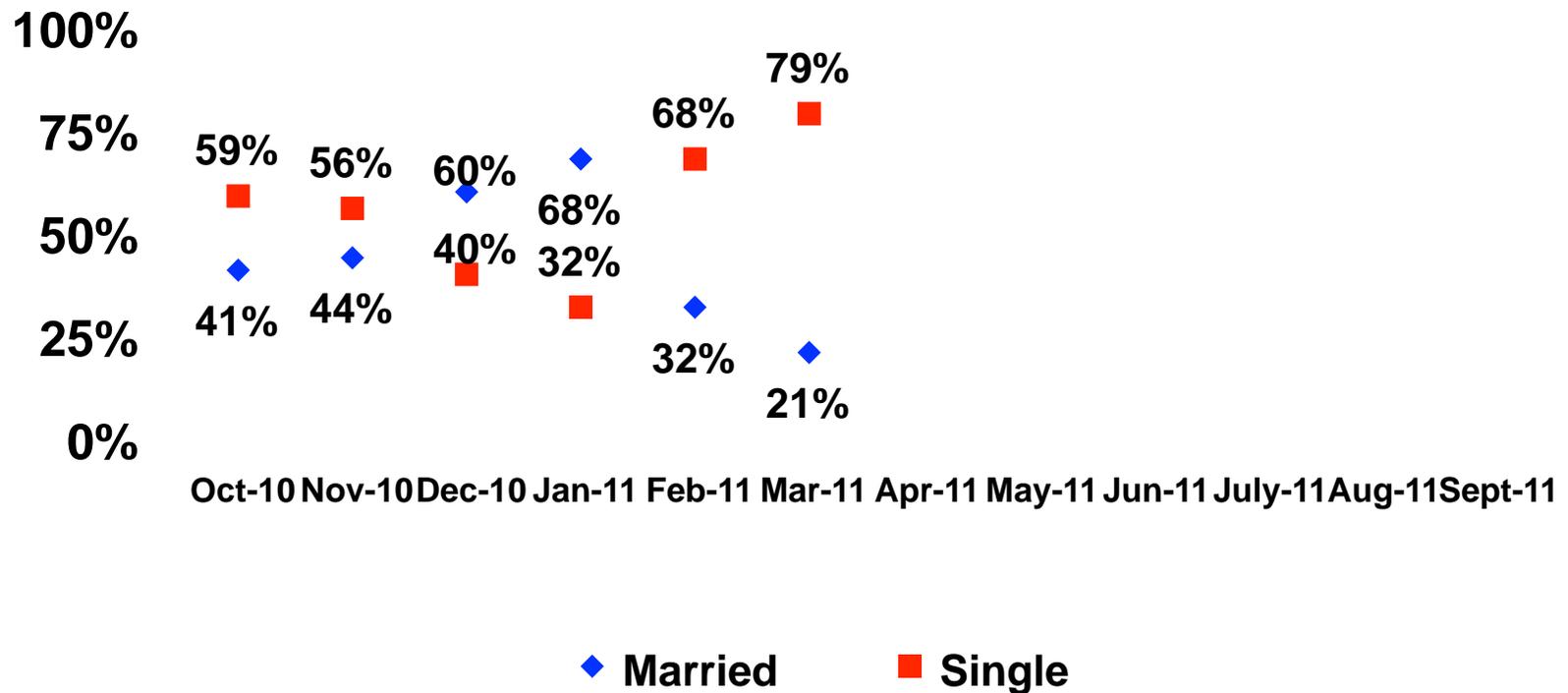
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

# 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%						
<b>Repeaters</b>	38%	39%	42%	56%	29%	22%						
<b>Shoppers</b>	58%	62%	57%	58%	64%	61%						
<b>Seniors</b>	9%	8%	16%	10%	8%	8%						
<b>OL/Salary-woman</b>	18%	14%	16%	10%	10%	3%						
<b>Group Travelers</b>	6%	3%	6%	2%	5%	6%						
<b>Students</b>	13%	13%	6%	8%	33%	65%						
<b>Golfers</b>	4%	4%	4%	8%	6%	7%						
<b>Wedding</b>	6%	5%	11%	2%	4%	3%						
<b>Divers</b>	9%	10%	8%	9%	10%	12%						
<b>Honey-mooner</b>	5%	5%	8%	3%	3%	1%						
<b>TOTAL</b>	<b>329</b>	<b>329</b>	<b>329</b>	<b>328</b>	<b>328</b>	<b>328</b>						

# SECTION 1 **PROFILE OF RESPONDENTS**

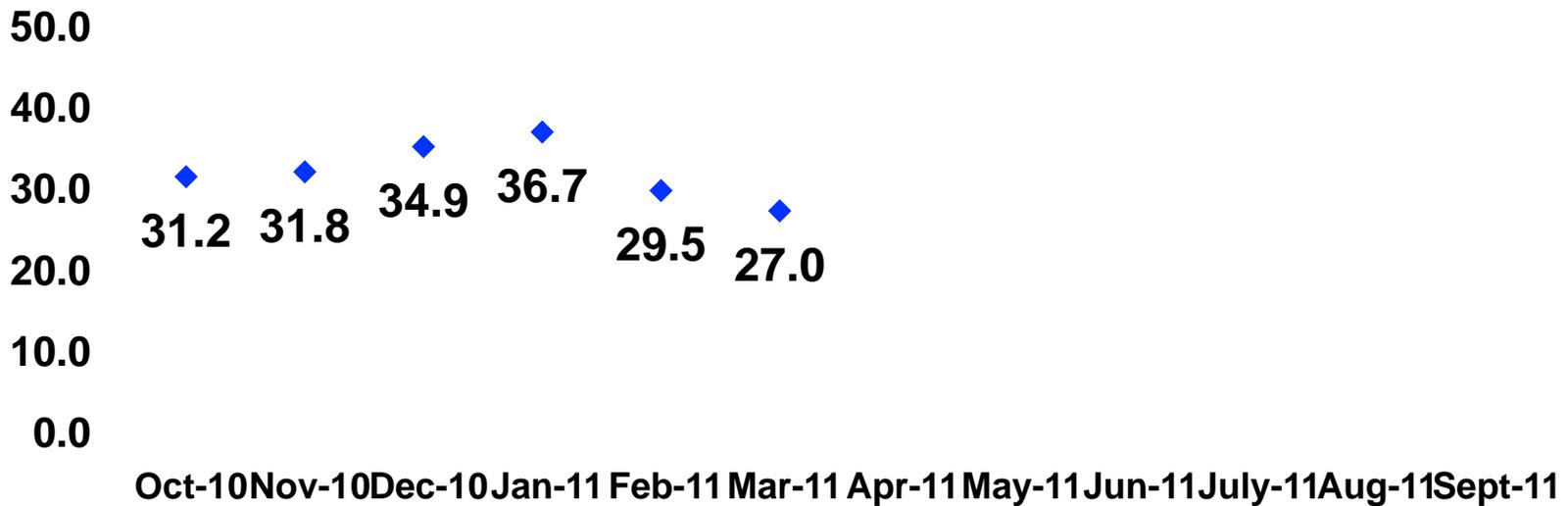
# Marital Status Tracking



# Marital Status Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
C. Married Count	68	29	29	39	1	2	2	3	6	4	3	23
Col %	21%	69%	40%	19%	9%	11%	1%	13%	55%	100%	8%	38%
Single Count	260	13	44	162	10	17	211	20	5		35	3
Col %	79%	31%	60%	81%	91%	89%	99%	87%	45%		92%	1.2%
Total Count	328	42	73	201	11	19	213	23	11	4	38	26

# Average Age Tracking



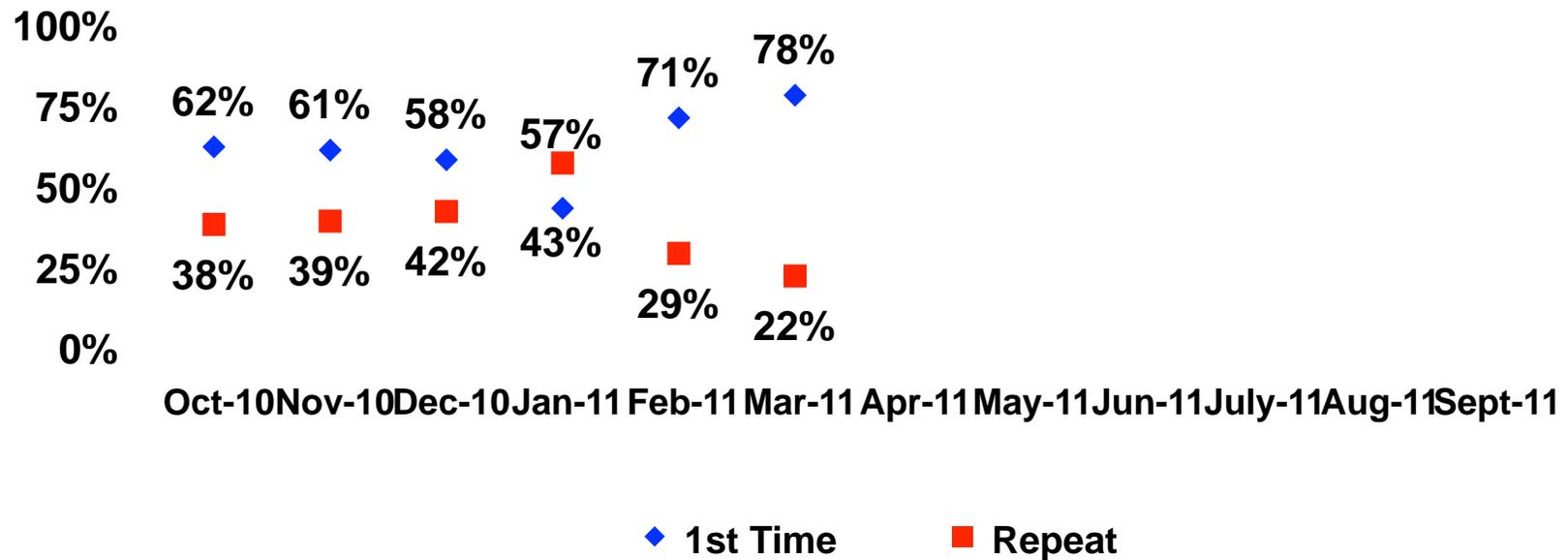
# Age Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR	
D.	18-34	Count	274	17	49	173	10	17	213	21	5	3	36	
		Col %	84%	40%	67%	86%	91%	89%	100%	91%	45%	75%	95%	
	35-54	Count	36	19	18	18	1	2	1	2	1	1	8	
		Col %	11%	45%	25%	9%	9%	11%	4%	18%	25%	3%	31%	
	55+	Count	18	6	6	10			1	4		1	18	
		Col %	5%	14%	8%	5%			4%	36%		3%	69%	
Total	Count		328	42	73	201	11	19	213	23	11	4	38	26
D.	Mean		27.0	39.7	32.2	26.2	28.4	24.8	21.6	25.2	43.9	27.8	24.2	57.1
	Median		22	39	26	22	24	22	22	22	38	26	22	56

# Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than Y2 million	Count	38		3	28		2	34	6		1	9	
		Col %	15%		5%	18%		17%	23%	32%		25%	29%	
	Y2,000,001 - Y3,000,000	Count	23	2	5	18	2	3	12	2		1	3	2
		Col %	9%	6%	8%	11%	22%	25%	8%	11%		25%	10%	9%
	Y3,000,001 - Y4,000,000	Count	24	5	5	16	3	1	10	1	1		1	3
		Col %	10%	14%	8%	10%	33%	8%	7%	5%	10%		3%	13%
	Y4,000,001 - Y5,000,000	Count	36	6	7	23	3	1	20	1	3	1	1	1
		Col %	15%	17%	12%	15%	33%	8%	14%	5%	30%	25%	3%	4%
	Y5,000,001 - Y7,000,000	Count	43	7	11	28	1	2	27	3	2		5	5
		Col %	17%	19%	18%	18%	11%	17%	18%	16%	20%		16%	22%
	Y7,000,001 - Y10,000,000	Count	38	13	15	20		1	18	2	4		4	8
		Col %	15%	36%	25%	13%		8%	12%	11%	40%		13%	35%
	Y10,000,001 or more	Count	25	3	10	14		1	11	2			4	4
		Col %	10%	8%	17%	9%		8%	7%	11%			13%	17%
	No Income	Count	20		4	11		1	16	2		1	4	
		Col %	8%		7%	7%		8%	11%	11%		25%	13%	
Total	Count		247	36	60	158	9	12	148	19	10	4	31	23

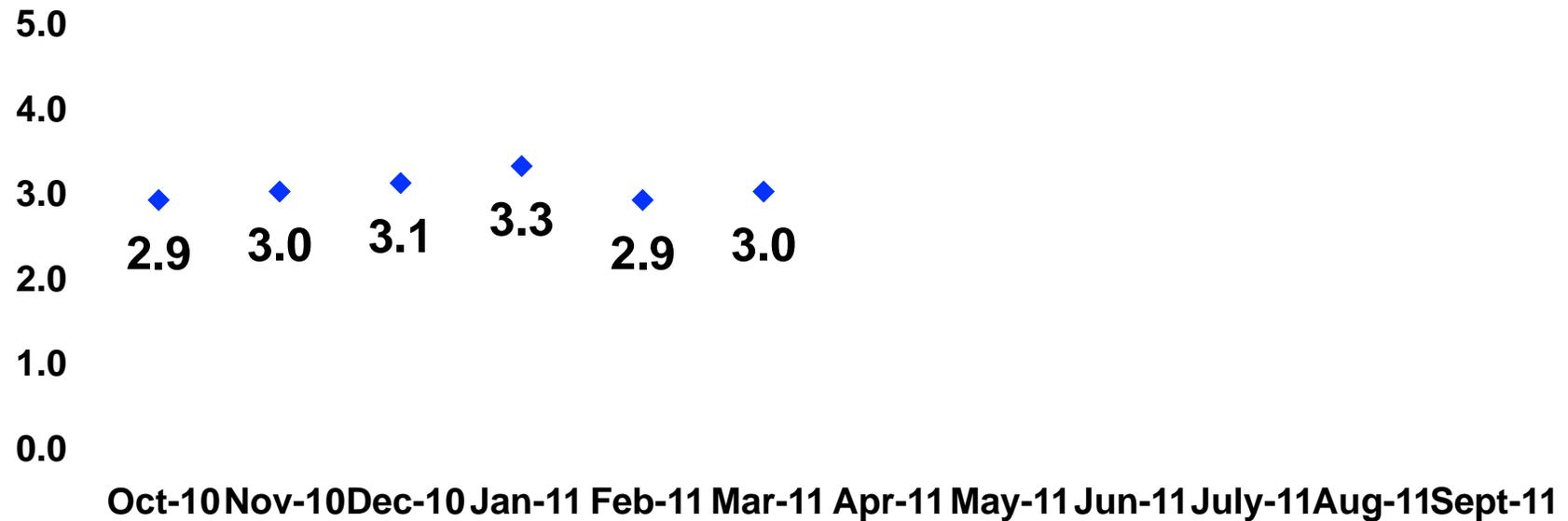
# Prior Trips to Guam Tracking



# Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A	Yes	Count	255	28		156	5	15	185	18	8	4	33	16
		Col %	78%	67%		78%	45%	79%	87%	78%	73%	100%	87%	62%
	No	Count	73	14	73	45	6	4	28	5	3		5	10
		Col %	22%	33%	100%	22%	55%	21%	13%	22%	27%		13%	38%
Total		Count	328	42	73	201	11	19	213	23	11	4	38	26

# 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	3.0	3.0	3.0	3.0	2.9	2.9	3.3	3.1	3.5	3.0	3.5
Median	3	3	3	3	3	3	3	3	3	4	3	3
Minimum	2	2	2	2	2	2	2	2	3	2	2	2
Maximum	9	5	9	9	4	5	5	9	4	4	5	9

# 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	93	12	19	57	4		64	6	3	1	10	7
		Col %	29%	29%	27%	28%	36%		30%	26%	30%	25%	26%	27%
	Free-time package tours	Count	197	26	41	123	6		130	11	5	3	23	16
		Col %	61%	62%	58%	61%	55%		62%	48%	50%	75%	61%	52%
	Individually arranged travel	Count	12	2	6	7			3	2	1		3	1
		Col %	4%	5%	8%	3%			1%	9%	10%		8%	4%
	Group tour	Count	19	1	4	12	1	19	14	3			2	1
		Col %	6%	2%	6%	6%	9%	100%	7%	13%			5%	4%
	Other	Count	1	1		1					1			1
		Col %	0%	2%		0%					10%			4%
	Company paid travel	Count	2		1	1				1				
		Col %	1%		1%	0%				4%				
Total	Count		324	42	71	201	11	19	211	23	10	4	38	26

# Travel Motivation Segmentation

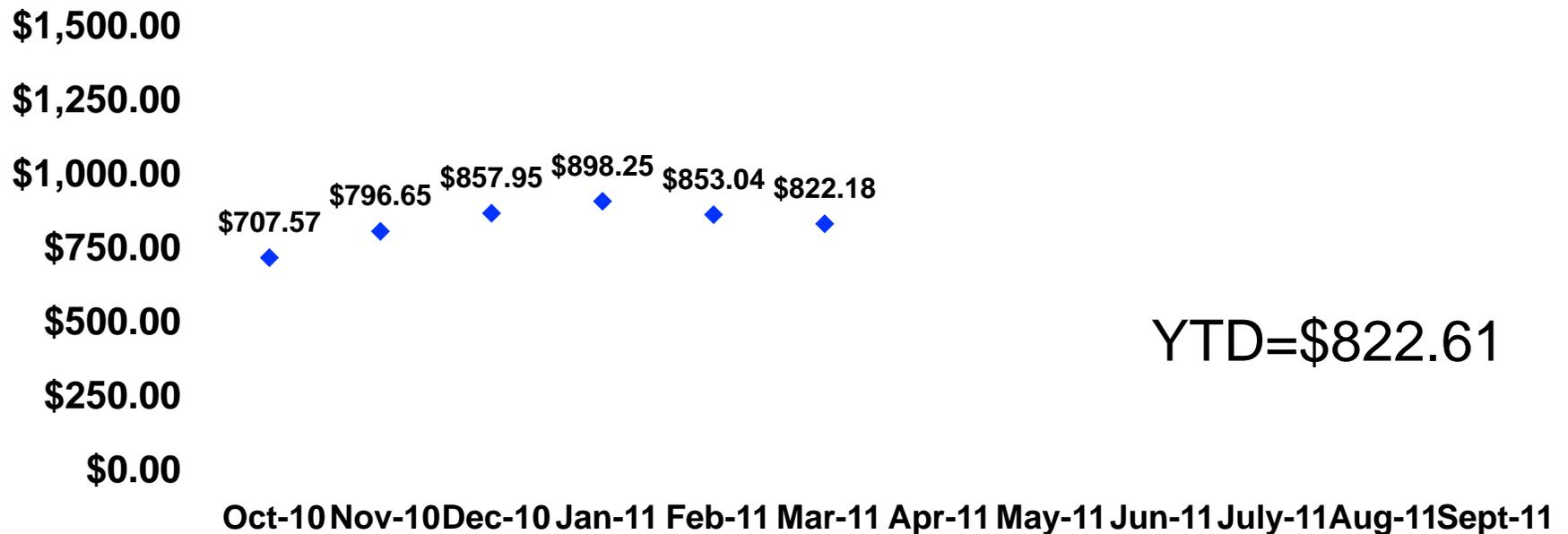
	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Beautiful seas, beaches, tropical climate	56%	43%	53%	62%	73%	32%	59%	57%	9%	25%	61%	31%
Pleasure	50%	33%	50%	50%	45%	32%	54%	35%			47%	35%
Shopping	34%	40%	39%	40%	27%	32%	35%	30%	9%	25%	29%	31%
Short travel time	29%	31%	39%	30%	45%	21%	26%	17%	9%	25%	37%	27%
Price of the tour package	29%	14%	25%	32%	36%	5%	35%	30%		25%	39%	8%
Recommendation of friend, relative, travel agency	26%	7%	21%	30%		53%	29%	30%	9%		29%	15%
Just to relax	25%	26%	33%	24%	45%	21%	21%	17%			26%	38%
Water sports	22%	14%	18%	22%	27%	16%	26%	39%			26%	4%
It is a safe place to spend a vacation	19%	31%	26%	15%	18%	21%	17%	13%		25%	13%	27%
A previous visit	14%	24%	64%	14%	36%	11%	6%	13%	18%		8%	27%
Other	9%		4%	10%	9%	16%	14%	17%			11%	
SCUBA diving	5%		3%	5%		11%	5%	17%			26%	
To get married or Attend wedding	3%	14%	4%	1%	9%				100%			15%
To golf	1%	2%	1%	1%			0%	17%			5%	
Organized Sporting Activity	1%		3%	2%		5%	1%	4%				
Company or Business trip	1%	2%	3%	2%			0%	4%				
Honeymoon	1%			1%						100%		
Promotional materials from GVB	1%	5%		0%		5%						
To visit friends or relatives	1%		1%	0%			0%					4%
My company sponsored me	1%		3%	0%				4%				
Convention, Conference, Trade show	1%		3%					4%				4%
Total Cases	327	42	72	201	11	19	213	23	11	4	38	26

# Information Sources Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR	
Q.1													
Travel guide book at bookstores	69%	81%	68%	69%	73%	58%	67%	57%	91%	50%	45%	77%	
Internet	62%	67%	67%	62%	55%	58%	65%	57%	55%	25%	68%	50%	
Travel agent brochure	60%	55%	59%	58%	64%	53%	62%	52%	64%	50%	61%	54%	
Friend or relative	28%	7%	15%	35%	9%	47%	35%	48%	18%	25%	32%	15%	
Magazine	25%	24%	25%	23%	55%	26%	28%	30%	36%		26%	27%	
I have been to Guam before	21%	29%	92%	21%	45%	21%	12%	22%	18%		13%	38%	
TV	17%	21%	16%	14%	18%	16%	15%	9%	27%	25%	5%	23%	
Newspaper	9%	12%	11%	6%	18%	5%	6%	4%	18%			27%	
Company travel department	1%	5%	1%	2%	9%		0%					4%	
GVB promotional activities	0%		1%	1%							3%		
Other	0%						0%						
Total	Cases	326	42	73	200	11	19	212	23	11	4	38	26

# SECTION 3 **EXPENDITURES**

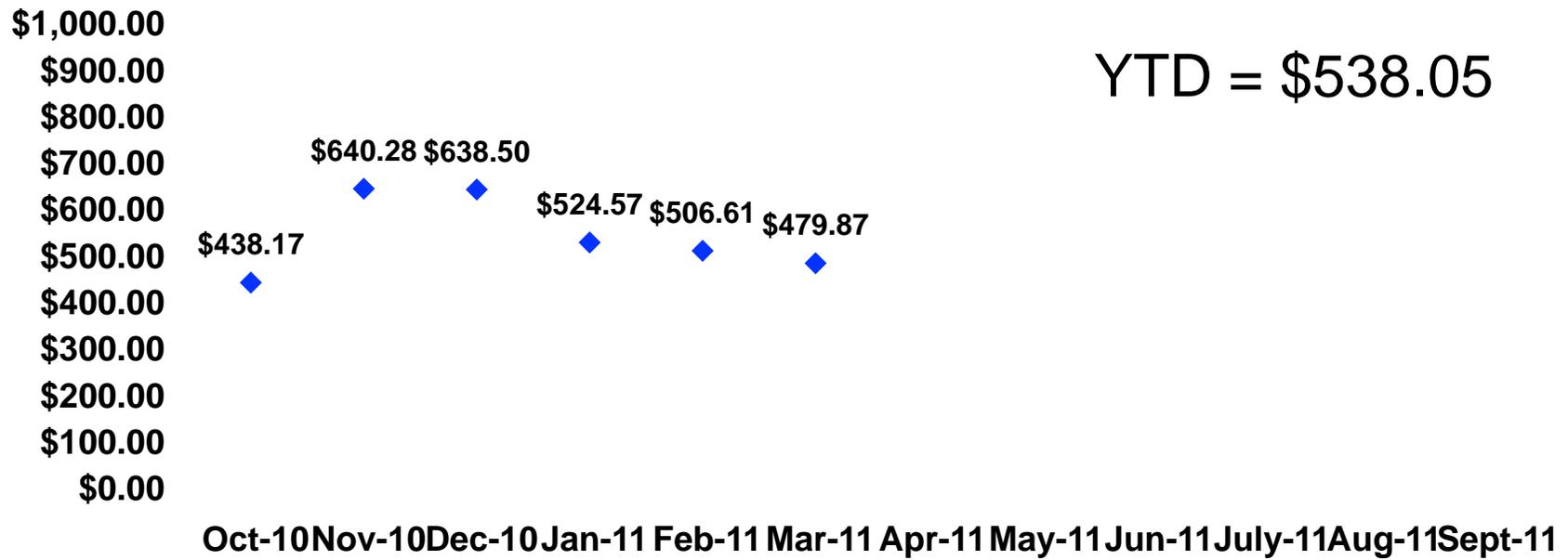
# Prepaid Expenditures Tracking



# Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid	Mean	\$822.18	\$1,028.67	\$860.01	\$815.94	\$1,011.15	\$831.81	\$736.38	\$769.03	\$1,431.75	\$1,276.75	\$813.95	\$1,285.00
per	Median	\$754	\$882	\$839	\$730	\$717	\$730	\$730	\$774	\$1,581	\$1,125	\$796	\$1,094
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$202.66	\$0.00	\$0.00	\$0.00	\$279.67	\$790.37	\$0.00	\$486.38
converted to \$	Maximum	\$3,647.86	\$3,039.88	\$3,647.86	\$3,647.86	\$3,039.88	\$1,945.53	\$1,398.35	\$1,215.95	\$3,039.88	\$2,067.12	\$1,823.93	\$3,647.86

# On-Island Expenditures Tracking



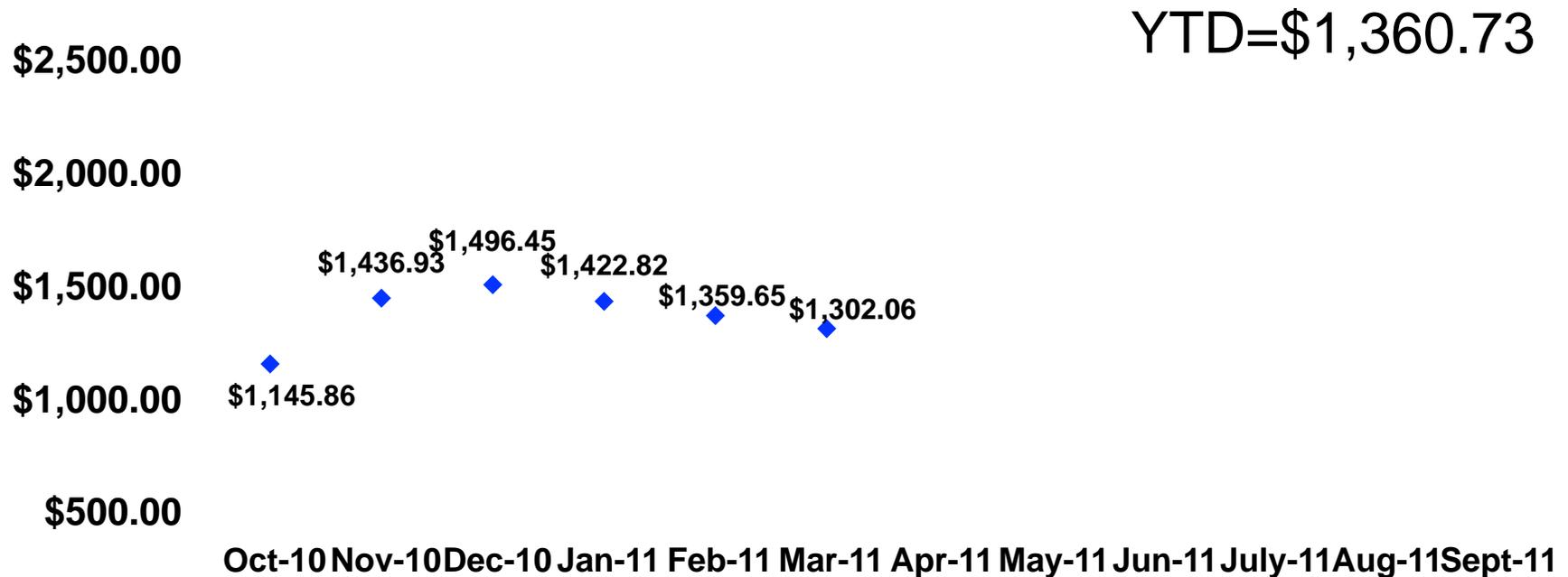
# On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$479.87	\$478.00	\$569.03	\$525.56	\$546.27	\$420.99	\$440.48	\$538.54	\$533.18	\$737.50	\$504.39	\$664.47
	Median	\$400	\$400	\$400	\$400	\$350	\$350	\$400	\$425	\$500	\$725	\$400	\$428
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00	\$150.00	\$250.00	\$0.00	\$0.00
	Maximum	\$5,180.00	\$1,500.00	\$3,120.00	\$5,180.00	\$1,720.00	\$1,720.00	\$2,000.00	\$2,000.00	\$1,500.00	\$1,250.00	\$2,000.00	\$3,120.00

# On-Island Expense Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$18.20	\$18.45	\$44.78	\$16.66	\$102.91	\$61.58	\$9.45	\$27.91	\$1.36	\$4.50	\$6.11	\$73.54
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$27.95	\$39.64	\$34.74	\$34.66	\$14.82	\$17.37	\$23.70	\$31.43	\$9.09	\$40.00	\$24.61	\$37.19
	Median	\$10.00	\$0.00	\$12.00	\$15.00	\$0.00	\$0.00	\$10.00	\$15.00	\$0.00	\$40.00	\$13.50	\$0.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$55.80	\$99.36	\$82.38	\$65.54	\$94.82	\$57.89	\$40.65	\$146.52	\$50.00	\$212.50	\$48.87	\$81.96
	Median	\$11.00	\$0.00	\$3.00	\$20.00	\$40.00	\$20.00	\$20.00	\$20.00	\$0.00	\$200.00	\$30.00	\$0.00
OPTIONAL TOUR	Mean	\$61.96	\$74.29	\$76.62	\$71.25	\$116.64	\$46.58	\$60.95	\$87.17	\$36.36	\$235.00	\$80.79	\$67.12
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$75.00	\$0.00	\$49.00	\$55.00	\$0.00	\$170.00	\$77.50	\$0.00
GIFT/ SOUV-SELF	Mean	\$129.88	\$157.19	\$119.31	\$169.80	\$63.64	\$69.47	\$111.03	\$146.57	\$40.91	\$337.50	\$107.00	\$75.46
	Median	\$40.00	\$0.00	\$30.00	\$50.00	\$0.00	\$0.00	\$50.00	\$50.00	\$0.00	\$275.00	\$50.00	\$0.00
GIFT/ SOUV- F&F AT HOME	Mean	\$97.98	\$136.19	\$101.10	\$116.47	\$127.27	\$53.68	\$91.12	\$101.74	\$139.09	\$225.00	\$112.50	\$65.15
	Median	\$50.00	\$0.00	\$50.00	\$50.00	\$10.00	\$40.00	\$50.00	\$50.00	\$0.00	\$200.00	\$100.00	\$0.00
LOCAL TRANS	Mean	\$12.65	\$21.48	\$27.34	\$13.48	\$12.45	\$9.74	\$10.21	\$18.48	\$10.91	\$15.00	\$5.89	\$14.50
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5.00	\$0.00	\$0.00
OTHER EXP	Mean	\$247.34	\$739.86	\$396.99	\$229.17	\$204.64	\$163.68	\$126.50	\$353.22	\$536.36	\$405.50	\$268.79	\$643.35
	Median	\$0.00	\$250.00	\$0.00	\$0.00	\$106.00	\$10.00	\$0.00	\$0.00	\$500.00	\$386.00	\$0.00	\$344.50

# Total Expenditures Tracking



# Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Total	Mean	\$1,302.06	\$1,506.67	\$1,429.05	\$1,341.50	\$1,557.42	\$1,252.80	\$1,176.86	\$1,307.57	\$1,964.93	\$2,014.25	\$1,318.34	\$1,949.47
per	Median	\$1,188.21	\$1,367.26	\$1,202.66	\$1,207.98	\$1,084.37	\$1,129.57	\$1,157.98	\$1,257.98	\$2,030.74	\$2,036.96	\$1,228.21	\$1,747.08
person	Minimum	\$0.00	\$400.00	\$0.00	\$0.00	\$754.58	\$400.00	\$250.00	\$686.38	\$429.67	\$1,665.95	\$564.79	\$729.57
expense	Maximum	\$6,395.95	\$3,804.88	\$4,347.86	\$6,395.95	\$3,804.88	\$3,665.53	\$2,778.21	\$2,778.21	\$3,804.88	\$2,317.12	\$2,778.21	\$4,347.86

**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.

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**Comparison of Drivers of Overall Satisfaction, Oct, Nov, Dec 2010, Jan, Feb, Mar, 2011, Overall Oct 2010 - Mar 2011**

	<b>Oct-10</b>	<b>Nov-10</b>	<b>Dec-10</b>	<b>Jan-11</b>	<b>Feb-11</b>	<b>Mar-11</b>	<b>Combined Oct 2010 - Mar 2011</b>
Independent Variables:	rank						
Cleanliness of beaches & parks	2		2	3	1	4	3
Ease of getting around							
Safety walking around at night		3	4				
Quality of daytime tours							4
Variety of daytime tours					3	2	
Quality of nighttime tours							
Variety of nighttime tours							
Quality of shopping		2	1			3	1
Variety of shopping	3			2	2		6
Price of things on Guam	1		3				5
Quality of hotel accommodations		1		1		1	2
<b>% of Overall Satisfaction Accounted For</b>	<b>36.7%</b>	<b>36.0%</b>	<b>53.0%</b>	<b>41.1%</b>	<b>38.6%</b>	<b>57.6%</b>	<b>43.2%</b>

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 March 2011 Period. By rank order they are:
  - **Quality of hotel accommodations,**
  - **Variety of day time tours,**
  - **Quality of shopping, and**
  - **Cleanliness of beaches & parks.**
- With all four factors the overall  $r^2$  is .576 meaning that **57.6% of overall satisfaction is accounted for by these four factors.**

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**Comparison of Drivers of Per Person On Island Expenditure, Oct, Nov, Dec 2010, Jan, Feb, Mar 2011, Overall Oct 2010 - Mar 2011**

	<b>Oct-10</b>	<b>Nov-10</b>	<b>Dec-10</b>	<b>Jan-11</b>	<b>Feb-11</b>	<b>Mar-11</b>	<b>Combine d Oct 2010 - Mar 2011</b>
Independent Variables:	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							
Quality of shopping	1						
Variety of shopping			1				1
Price of things on Guam					2	1	
Quality of hotel accommodations							
<b>% of Overall Satisfaction Accounted For</b>	<b>4.0%</b>	<b>0.0%</b>	<b>2.2%</b>	<b>0.0%</b>	<b>0.9%</b>	<b>3.2%</b>	<b>1.6%</b>

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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 March 2011 Period. It is:
  - **Price of things on Guam.**
- This factor has an overall  $r^2$  of .032 meaning that **3.2% of per person on island expenditure is accounted for by this factor.**