



GUAM VISITORS BUREAU
Japan Visitor Tracker Exit Profile
FY2010 MARKET SEGMENTATION –
MAY 2010



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 **333** 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 **333** 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

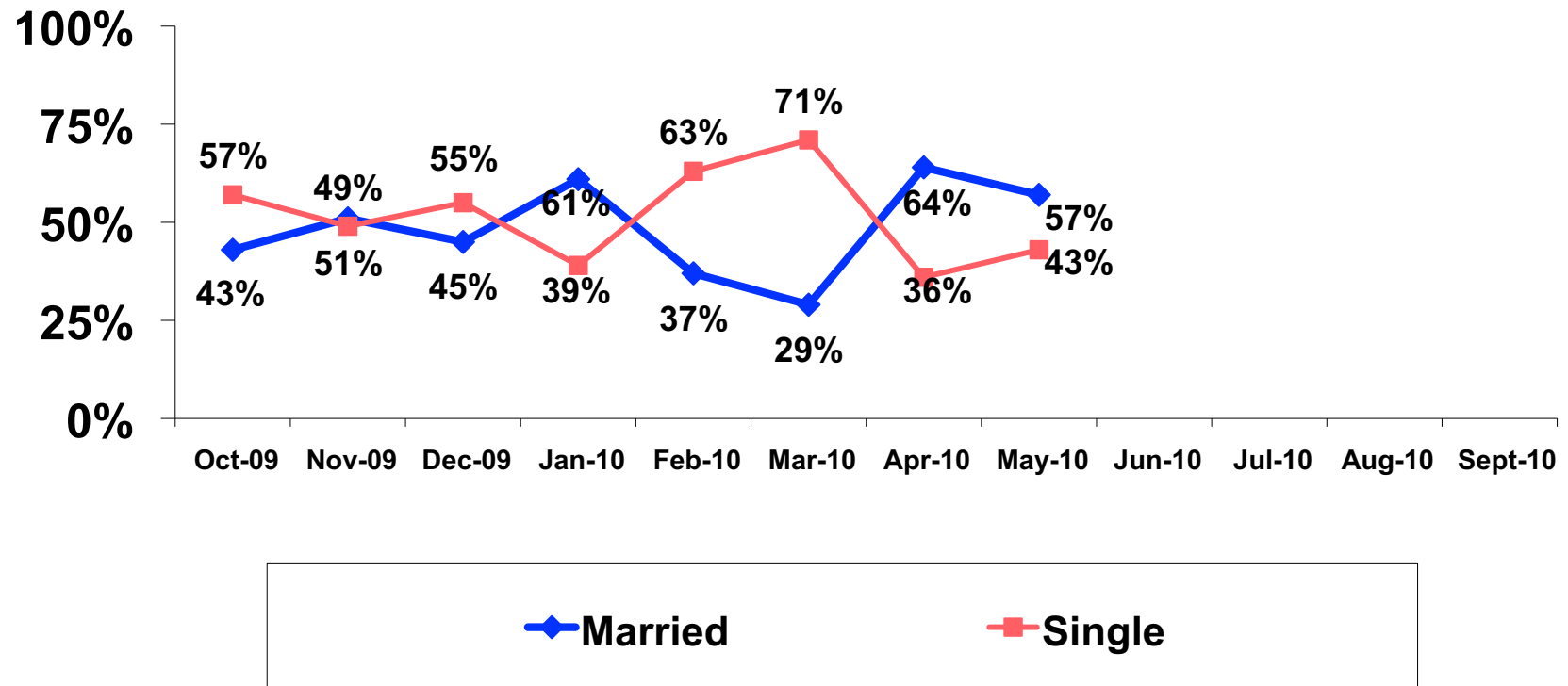
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

Highlighted Segments

	Oct 09	Nov 09	Dec 09	Jan 10	Feb 10	Mar 10	Apr 10	May 10	Jun 10	July 10	Aug 10	Sept 10
Families	21%	22%	21%	25%	24%	15%	41%	26%				
Repeaters	40%	33%	40%	42%	38%	25%	45%	48%				
Shoppers	49%	52%	46%	49%	47%	51%	48%	49%				
Seniors	5%	6%	9%	8%	7%	4%	7%	7%				
OL/Salary-woman	15%	12%	12%	13%	11%	4%	12%	17%				
Group Travelers	3%	7%	3%	4%	4%	3%	3%	2%				
Students	9%	10%	16%	10%	29%	52%	13%	3%				
Golfers	4%	6%	6%	6%	5%	7%	4%	7%				
Wedding	8%	12%	7%	8%	6%	6%	7%	5%				
Divers	6%	12%	10%	11%	10%	12%	7%	13%				
Honey-mooner	11%	9%	8%	7%	4%	6%	8%	65				
TOTAL	328	330	330	330	330	330	331	333				

SECTION 1 **PROFILE OF RESPONDENTS**

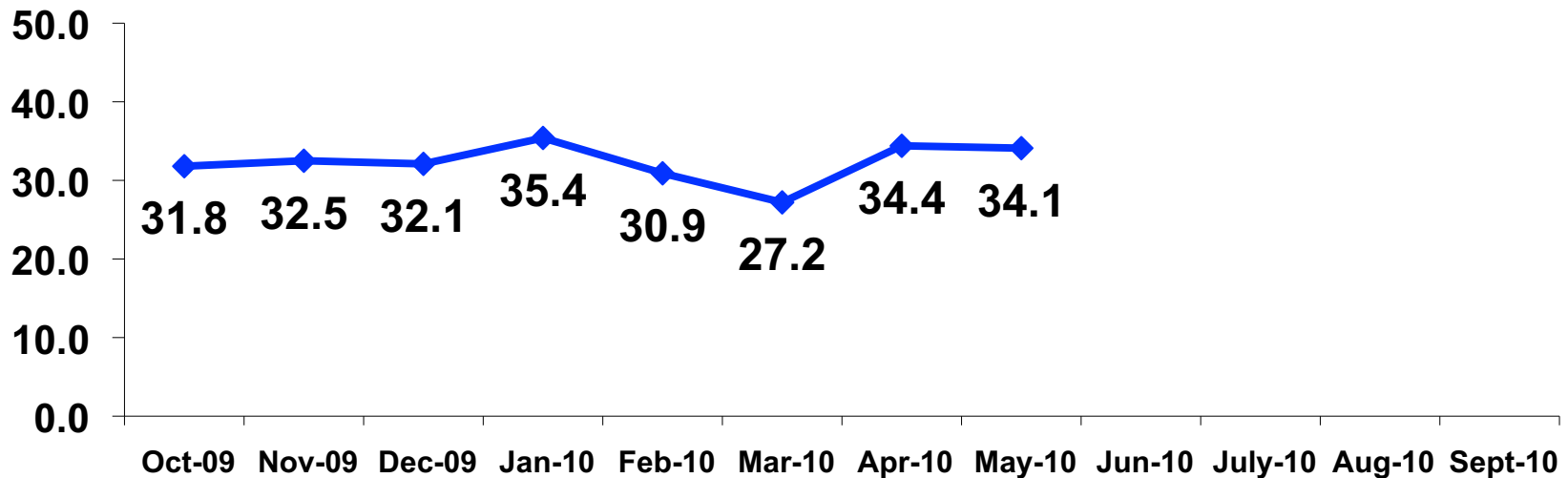
Marital Status Tracking



Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
C. Married	Count		188	68	102	94	20	1		16	13	21	14	21
	Col %		57%	81%	64%	58%	34%	20%		67%	76%	100%	32%	91%
Single	Count		142	16	57	69	38	4	10	8	4		30	2
	Col %		43%	19%	36%	42%	66%	80%	100%	33%	24%		68%	9%
Total	Count		330	84	159	163	58	5	10	24	17	21	44	23

Average Age Tracking



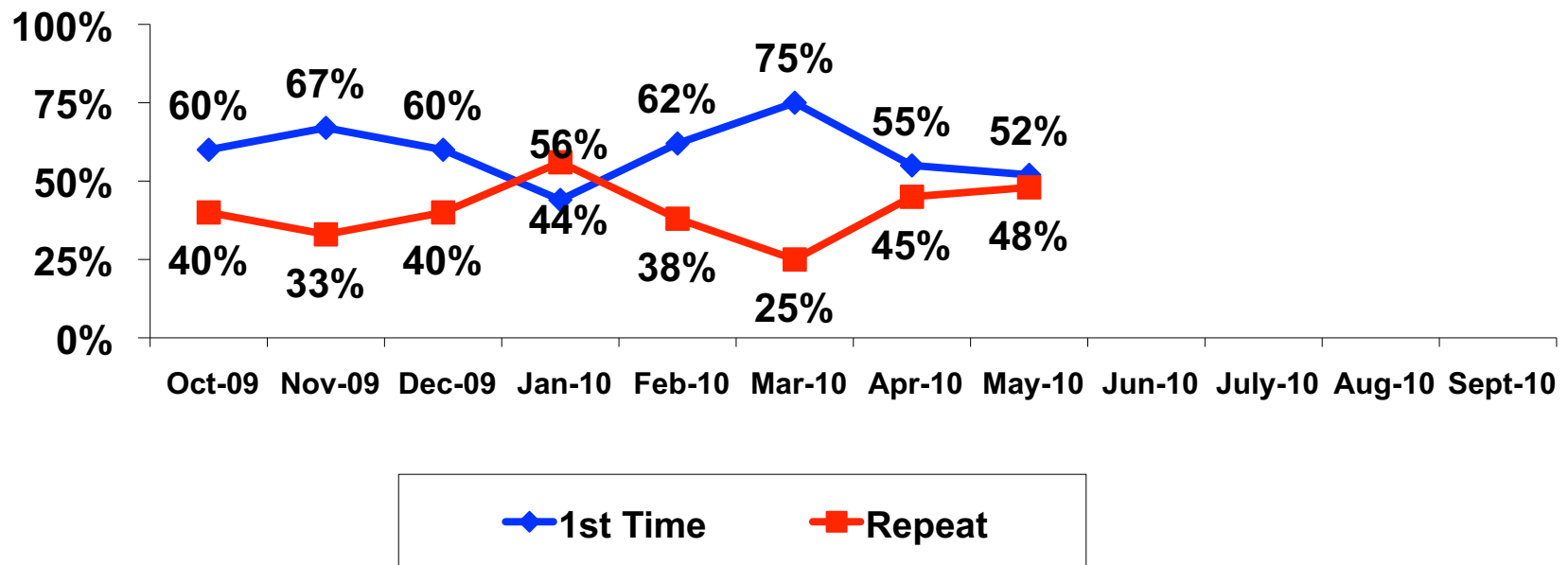
Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	196	32	74	104	44	5	10	10	10	20	34	
		Col %	59%	38%	46%	63%	76%	100%	100%	40%	59%	95%	77%	
	35-54	Count	123	46	80	51	13			13	5	1	10	9
		Col %	37%	54%	50%	31%	22%			52%	29%	5%	23%	39%
	55+	Count	14	7	7	9	1			2	2			14
		Col %	4%	8%	4%	5%	2%			8%	12%			61%
Total	Count		333	85	161	164	58	5	10	25	17	21	44	23
D.	Mean		34.1	38.6	36.4	33.4	30.7	27.4	21.7	36.5	35.6	27.8	30.1	56.6
	Median		32	38	35	30	29	26	22	37	34	27	28	56

Income Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR	
Q.31	Less than Y2 million	Count Col %	15 5%	2 3%	5 3%	7 5%	5 9%	2 50%	2 20%	1 4%	1 6%	1 2%		
	Y2,000,001 - Y3,000,000	Count Col %	34 11%	2 3%	10 7%	20 13%	9 17%		3 12%		3 16%	10 23%	2 11%	
	Y3,000,001 - Y4,000,000	Count Col %	45 15%	9 12%	14 10%	25 16%	14 26%	1 25%	2 8%	4 25%	10 53%	7 16%		
	Y4,000,001 - Y5,000,000	Count Col %	43 14%	6 8%	19 13%	24 16%	8 15%		5 20%	1 6%	3 16%	8 19%	2 11%	
	Y5,000,00 - Y7,000,000	Count Col %	52 17%	16 21%	28 19%	22 14%	6 11%	1 10%	5 20%	4 25%	1 5%	7 16%	2 11%	
	Y7,000,001 - Y10,000,000	Count Col %	45 15%	15 19%	30 21%	21 14%	8 15%		4 16%	3 19%	1 5%	2 5%	2 11%	
	Y10,000,001 or more	Count Col %	71 23%	25 32%	40 27%	34 22%	3 6%	1 25%	7 70%	5 20%	2 13%	1 5%	8 19%	10 53%
	No Income	Count Col %	2 1%	2 3%		1 1%				1 6%			1 5%	
Total	Count		307	77	146	154	53	4	10	25	16	19	43	19

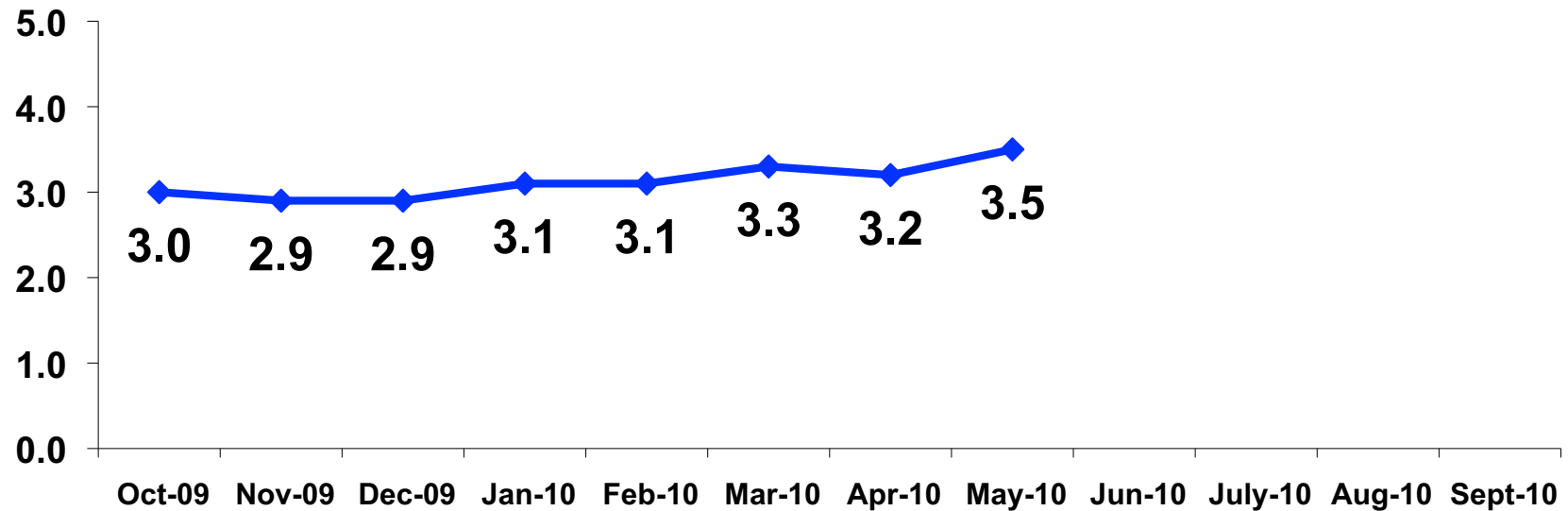
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		172	34		98	29	5	5	11	13	19	26	10
	Col %		52%	40%		60%	50%	100%	50%	44%	76%	90%	59%	43%
No	Count		161	51	161	66	29		5	14	4	2	18	13
	Col %		48%	60%	100%	40%	50%		50%	56%	24%	10%	41%	57%
Total	Count		333	85	161	164	58	5	10	25	17	21	44	23

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	3.5	3.9	3.6	3.6	3.3	3.0	3.2	3.8	3.4	4.0	3.5	4.4
Median	3	4	3	3	3	3	3	4	3	4	3	3
Minimum	1	2	1	2	2	2	2	2	2	2	2	2
Maximum	24	24	24	9	6	4	5	9	6	6	9	24

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	69	23	29	39	10		1	5	7	11	7	5
	Col %	21%	27%	18%	24%	17%		10%	20%	41%	52%	16%	22%
Free-time package tours	Count	214	47	101	104	38		8	14	9	9	29	13
	Col %	65%	55%	63%	63%	66%		80%	56%	53%	43%	66%	57%
Individually arranged travel	Count	42	14	29	16	8		1	6	1	1	7	4
	Col %	13%	16%	18%	10%	14%		10%	24%	6%	5%	16%	17%
Group tour	Count	5			4	2	5					1	
	Col %	2%			2%	3%	100%					2%	
Other	Count	1	1	1	1								1
	Col %	0%	1%	1%	1%								4%
Total	Count	331	85	160	164	58	5	10	25	17	21	44	23

Travel Motivation Segmentation

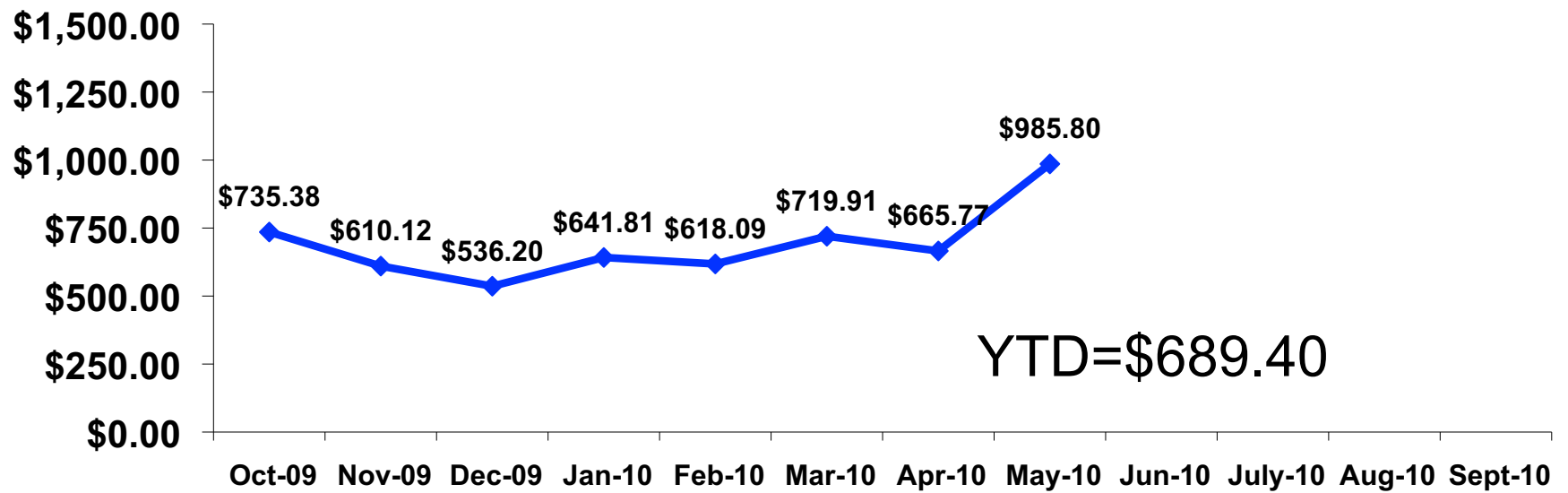
	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Beautiful seas, beaches, tropical climate	59%	62%	56%	61%	50%	20%	70%	36%	29%	62%	59%	52%
Short travel time	49%	60%	55%	48%	40%		50%	48%	35%	38%	39%	43%
Pleasure	44%	47%	39%	53%	45%		50%	24%	24%	33%	43%	30%
Just to relax	42%	36%	41%	48%	40%	20%	60%	40%	12%	24%	34%	48%
A previous visit	36%	48%	74%	30%	38%		50%	44%	18%	10%	25%	30%
Price of the tour package	32%	26%	28%	42%	33%		20%	28%	6%	38%	30%	9%
Shopping	27%	33%	29%	30%	41%	20%	20%	20%		24%	11%	26%
It is a safe place to spend a vacation	18%	21%	21%	16%	14%		10%	16%	12%	24%	16%	30%
Water sports	17%	12%	15%	16%	21%			20%	6%	24%	18%	13%
Recommendation of friend, relative, travel agency	11%	11%	6%	15%	9%		10%	16%	6%	10%	16%	17%
SCUBA diving	7%	2%	9%	7%	10%		10%	16%			41%	4%
Honeymoon	6%	4%	1%	9%	2%			4%	24%	100%	5%	
To golf	5%	5%	8%	8%	5%			44%			5%	9%
To get married or Attend wedding	5%	11%	2%	4%	2%		10%		100%	19%		9%
Other	4%	1%	4%	2%	2%				6%	5%	2%	
Company or Business trip	2%		1%	2%	3%	80%		4%			2%	
Career certification or testing	2%		3%		3%							
To visit friends or relatives	1%	1%	2%	1%	3%							
My company sponsored me	0%	1%		1%	2%							
Promotional materials from GVB	1%		1%									
Special promotion	0%		1%									
Total Cases	333	85	161	164	58	5	10	25	17	21	44	23

Information Sources Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1 Internet	67%	72%	66%	66%	72%	75%	60%	83%	76%	52%	77%	62%
Travel guide book at bookstores	60%	63%	49%	71%	63%	100%	50%	58%	65%	71%	65%	57%
I have been to Guam before	42%	56%	86%	36%	46%		40%	42%	12%	5%	40%	38%
Travel agent brochure	42%	43%	26%	54%	28%	25%	50%	33%	59%	86%	37%	52%
Magazine	22%	26%	20%	27%	12%		20%	17%	24%	29%	21%	19%
Friend or relative	16%	9%	8%	24%	16%	25%	20%	25%	18%	24%	26%	14%
TV	12%	14%	13%	14%	4%		10%	8%	6%	5%	9%	19%
Company travel department	4%	2%	3%	3%	4%	25%		4%	6%	5%	2%	5%
Newspaper	1%	2%	3%	1%	2%		10%					5%
GVB office	1%	1%	1%	2%				4%	6%		2%	5%
Other	1%		3%		2%				6%			
GVB promotional activities	1%	1%	1%	1%					6%			5%
Total Cases	322	81	158	160	57	4	10	24	17	21	43	21

SECTION 3 **EXPENDITURES**

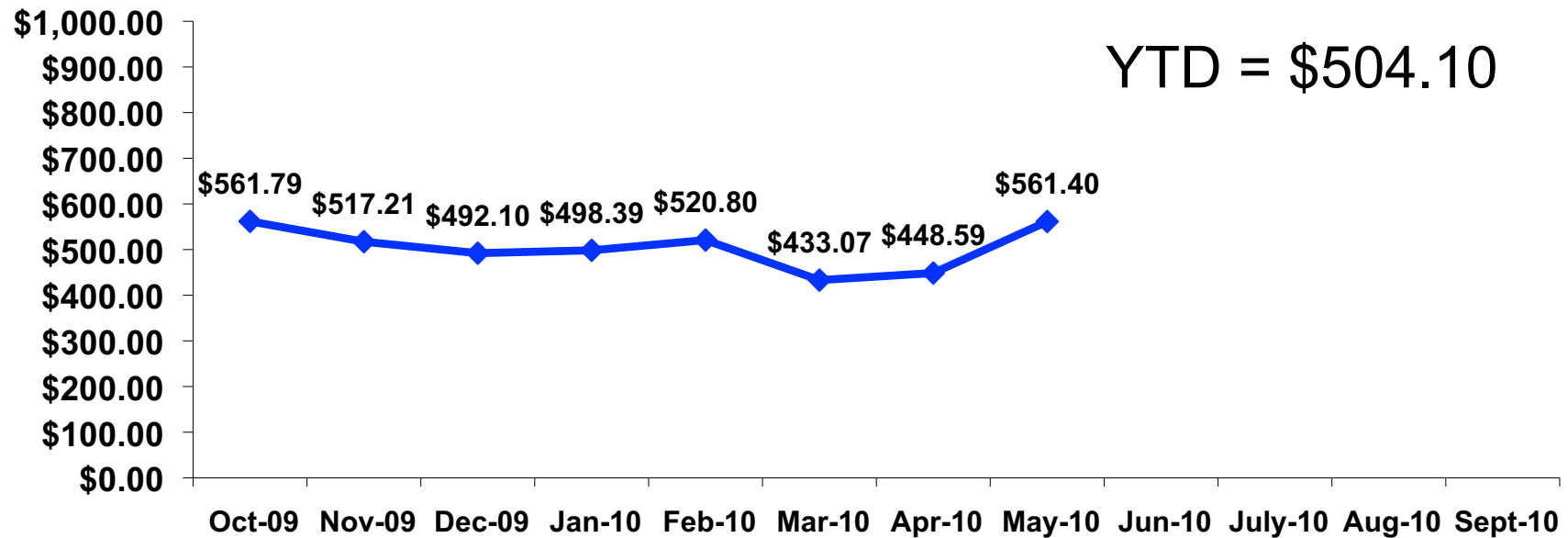
Prepaid Expenditures Tracking



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid	Mean	\$985.75	\$1,038.53	\$895.98	\$1,011.78	\$825.55	\$330.58	\$783.51	\$863.51	\$1,506.25	\$1,452.67	\$950.45	\$977.64
per	Median	\$859	\$859	\$805	\$891	\$751	\$258	\$590	\$805	\$1,193	\$1,489	\$805	\$805
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
converted to \$	Maximum	\$7,298.49	\$7,298.49	\$2,889.67	\$5,151.87	\$2,683.27	\$858.65	\$1,824.62	\$2,178.81	\$7,298.49	\$2,889.67	\$5,151.87	\$3,037.46

On-Island Expenditures Tracking



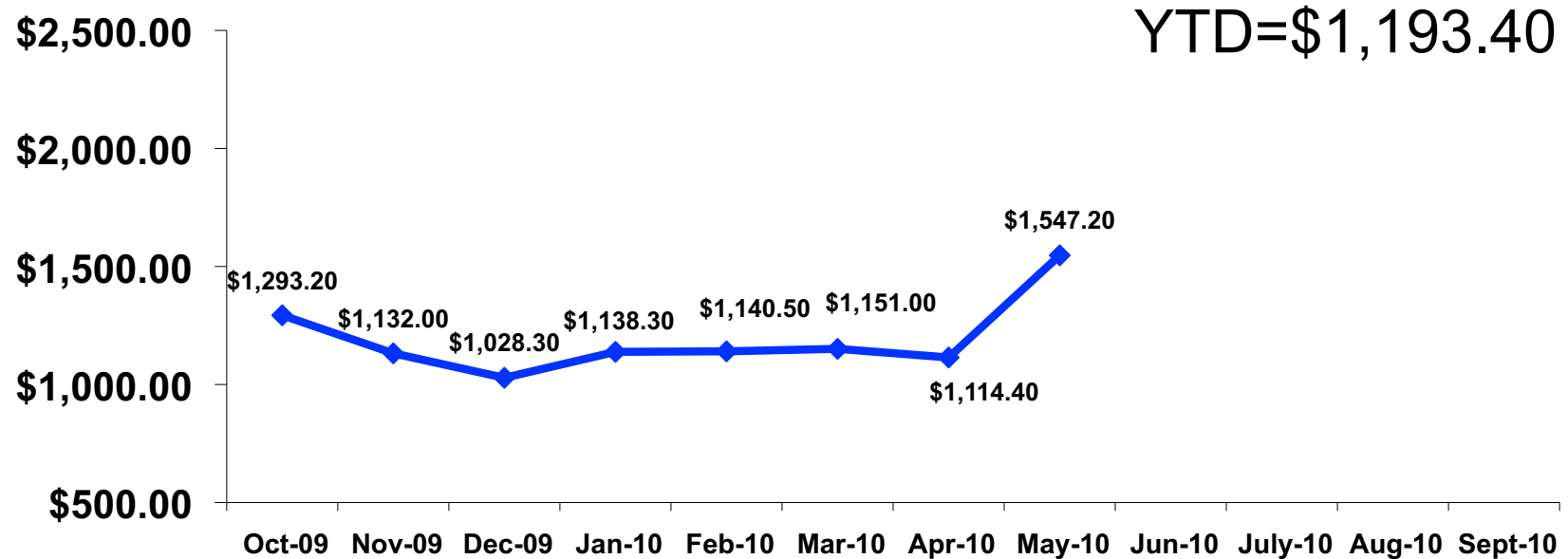
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$561.42	\$463.51	\$561.26	\$607.26	\$553.90	\$400.00	\$286.10	\$516.54	\$438.10	\$681.33	\$580.77	\$528.98
	Median	\$433	\$333	\$435	\$450	\$400	\$300	\$175	\$400	\$400	\$500	\$470	\$500
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$70.00	\$0.00	\$0.00	\$0.00	\$0.00
	Maximum	\$4,995.00	\$3,390.00	\$3,390.00	\$4,995.00	\$3,390.00	\$800.00	\$750.00	\$1,500.00	\$1,250.00	\$1,750.00	\$2,500.00	\$1,300.00

On-Island Expense Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$63.63	\$102.64	\$61.43	\$59.63	\$19.91	\$2.00	\$73.00	\$133.76	\$23.88	\$68.00	\$22.05	\$94.17
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00	\$0.00	\$10.00	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$40.75	\$34.73	\$39.98	\$48.61	\$32.36	\$9.00	\$14.80	\$35.60	\$13.12	\$81.50	\$33.25	\$40.48
	Median	\$10.00	\$7.00	\$5.00	\$20.00	\$13.50	\$5.00	\$9.00	\$0.00	\$0.00	\$40.00	\$10.00	\$20.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$81.21	\$79.27	\$89.86	\$91.76	\$63.50	\$9.00	\$51.30	\$92.40	\$28.41	\$60.50	\$68.75	\$34.35
	Median	\$20.00	\$0.00	\$18.00	\$40.00	\$21.50	\$0.00	\$30.00	\$0.00	\$0.00	\$0.00	\$47.50	\$0.00
OPTIONAL TOUR	Mean	\$96.45	\$76.18	\$87.12	\$129.28	\$57.55	\$20.00	\$55.50	\$185.72	\$82.35	\$160.50	\$144.18	\$172.17
	Median	\$0.00	\$0.00	\$0.00	\$50.00	\$0.00	\$0.00	\$0.00	\$90.00	\$0.00	\$80.00	\$100.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$326.71	\$338.47	\$338.23	\$366.53	\$310.16	\$38.00	\$40.00	\$257.60	\$620.88	\$634.00	\$305.59	\$280.65
	Median	\$50.00	\$0.00	\$50.00	\$50.00	\$30.00	\$0.00	\$25.00	\$30.00	\$0.00	\$120.00	\$25.00	\$35.00
GIFT/SOUV- F&F AT HOME	Mean	\$125.25	\$123.12	\$127.48	\$137.58	\$127.50	\$60.00	\$53.00	\$135.00	\$129.41	\$173.50	\$94.66	\$151.39
	Median	\$50.00	\$50.00	\$50.00	\$80.00	\$75.00	\$0.00	\$60.00	\$75.00	\$0.00	\$120.00	\$65.00	\$100.00
LOCAL TRANS	Mean	\$19.92	\$26.13	\$27.08	\$12.66	\$8.52	\$2.00	\$19.00	\$11.20	\$6.47	\$14.75	\$12.02	\$66.13
	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	\$285.08	\$402.95	\$339.54	\$297.21	\$181.02	\$360.00	\$129.50	\$269.20	\$544.94	\$499.95	\$138.55	\$307.04
	Median	\$0.00	\$5.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5.00	\$122.50	\$0.00	\$4.00

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	\$1,547.17	\$1,502.04	\$1,457.25	\$1,619.04	\$1,379.45	\$730.58	\$1,069.61	\$1,380.05	\$1,944.35	\$2,134.00	\$1,531.21	\$1,506.62
	Median	\$1,353.28	\$1,347.91	\$1,306.79	\$1,378.31	\$1,198.28	\$636.65	\$863.49	\$1,378.31	\$1,306.79	\$2,079.13	\$1,217.15	\$1,208.12
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$300.00	\$121.00	\$307.50	\$121.00	\$250.00	\$300.00	\$493.55
	Maximum	\$7,898.49	\$7,898.49	\$4,246.61	\$6,229.30	\$3,895.30	\$1,358.65	\$2,224.62	\$2,608.81	\$7,898.49	\$3,356.34	\$6,181.87	\$3,844.26

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 2009, Jan, Feb, Mar, Apr, May 2010, Overall Oct 2009 - May 2010									
	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Combined Oct 2009 - May 2010
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	4		3		3	2	3	3	3
Ease of getting around		2	4	2				4	5
Safety walking around at night									
Quality of daytime tours		3			4		2		
Variety of daytime tours	3			4					4
Quality of nighttime tours									
Variety of nighttime tours									
Quality of shopping	1	4		1		3		2	2
Variety of shopping			2		2		1	5	5
Price of things on Guam									
Quality of hotel accommodations	2	1	1	3	1	1	4	1	1
% of Overall Satisfaction Accounted For	52.1%	46.7%	49.2%	51.1%	41.4%	55.3%	45.4%	47.9%	48.5%

NOTE: Only significant variables are ranked.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by five significant factors in the May 2010 Period. By rank order they are:
 - **Quality of hotel accommodations,**
 - **Quality of shopping,**
 - **Cleanliness of beaches & parks,**
 - **Ease of getting around, and**
 - **Variety of shopping.**
- With all five factors the overall r^2 is .479 meaning that **47.9% of overall satisfaction is accounted for by these five factors.**

Comparison of Drivers of Per Person On Island Expenditure, Oct, Nov, Dec 2009, Jan, Feb, Mar, Apr, May 2010, Overall Oct 2009 - May 2010									
	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Combined Oct 2009 - May 2010
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks				3					3
Ease of getting around									
Safety walking around at night									
Quality of daytime tours				2					
Variety of daytime tours									
Quality of nighttime tours									
Variety of nighttime tours		1							
Quality of shopping			1						1
Variety of shopping				1					2
Price of things on Guam									
Quality of hotel accommodations									
% of Overall Satisfaction Accounted For	0.0%	1.5%	2.8%	5.6%	0.0%	0.0%	0.0%	0.0%	0.09%

NOTE: Only significant variables are ranked.

Drivers of Per Person On Island Expenditure

There are no significant drivers of Per Person On Island Expenditure during the May 2010 Period.