



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013

APRIL 2013



Prepared by: QMark Research

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Background & Methodology

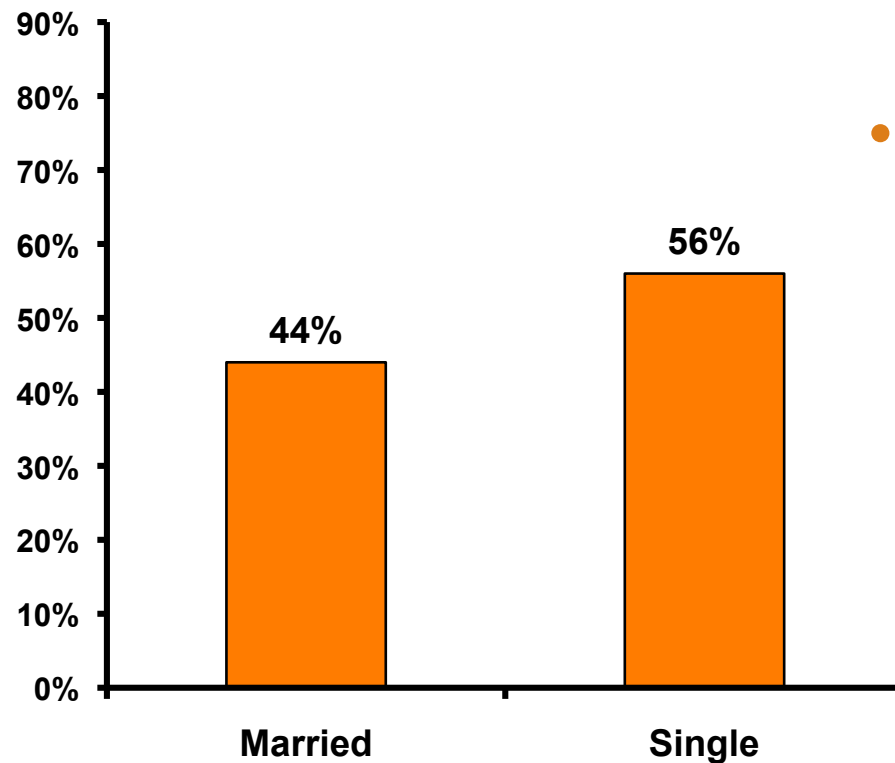
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing 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 **351** is +/- 5.23 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 +/- 5.23 percentage points.

Objectives

- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

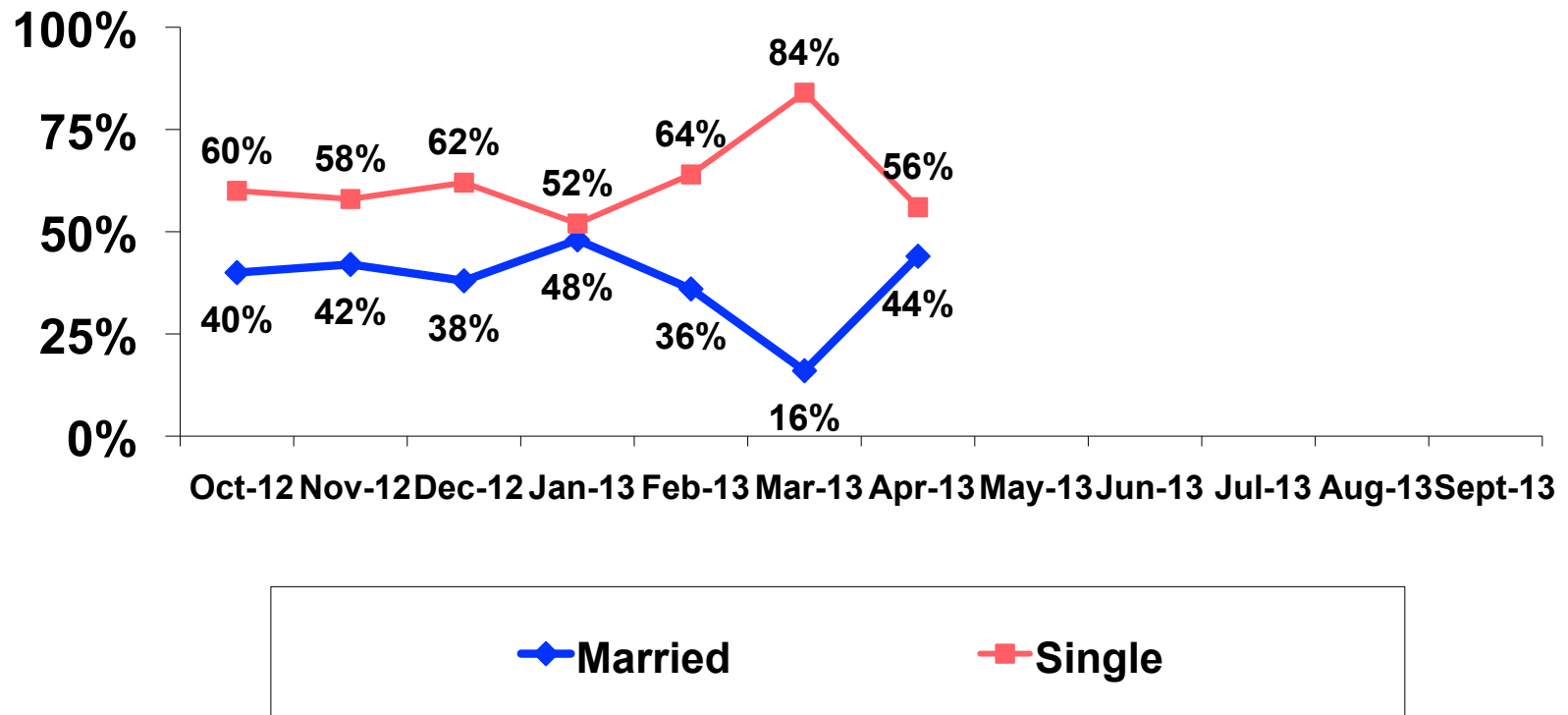
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

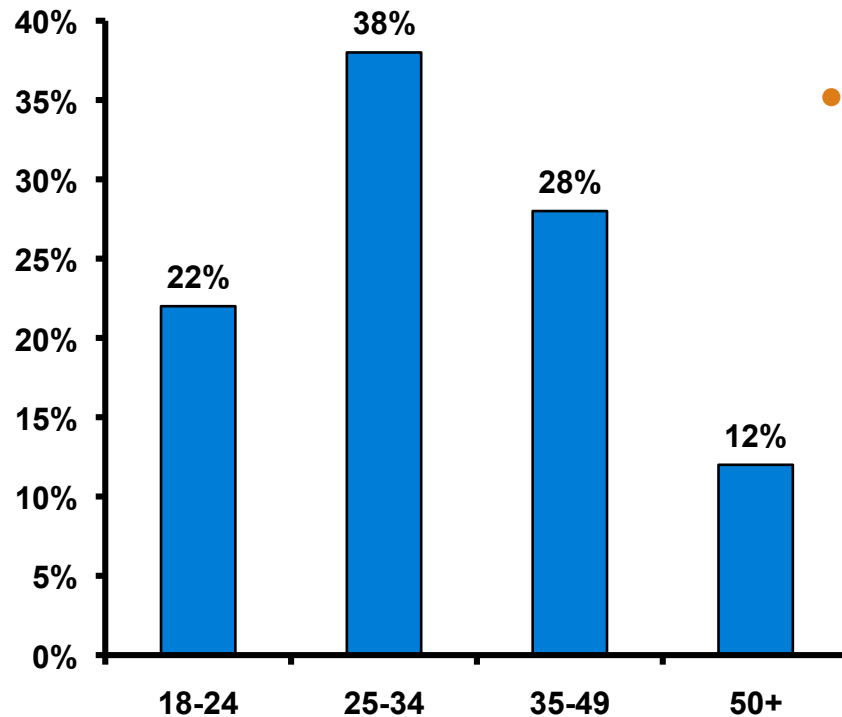


- 77% of female visitors are single.

Marital Status

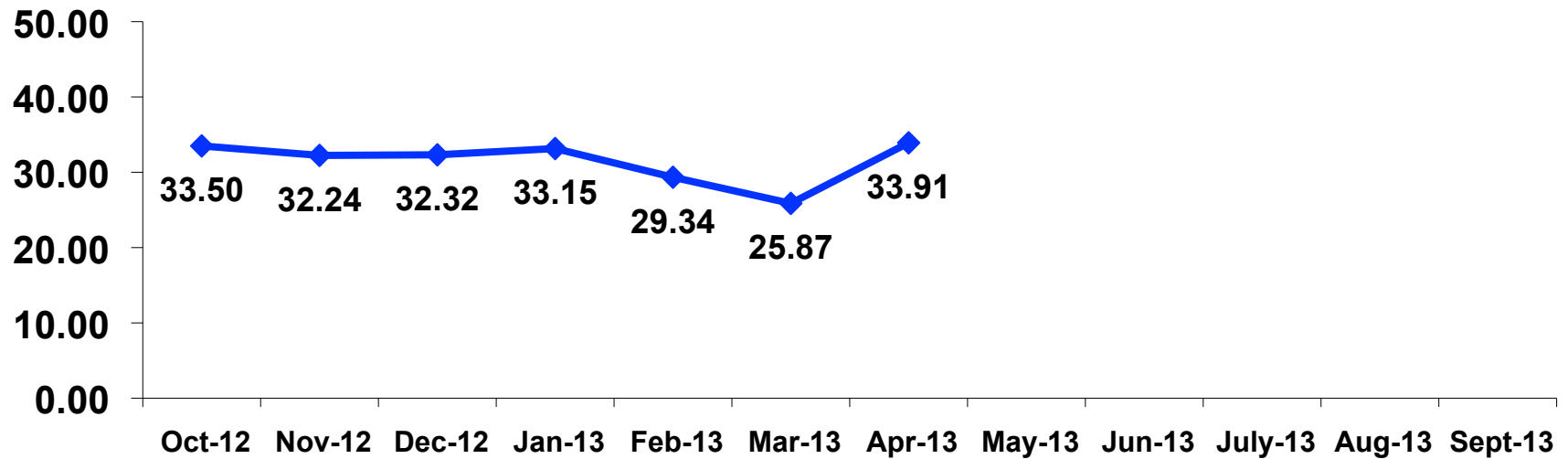


Age - Overall

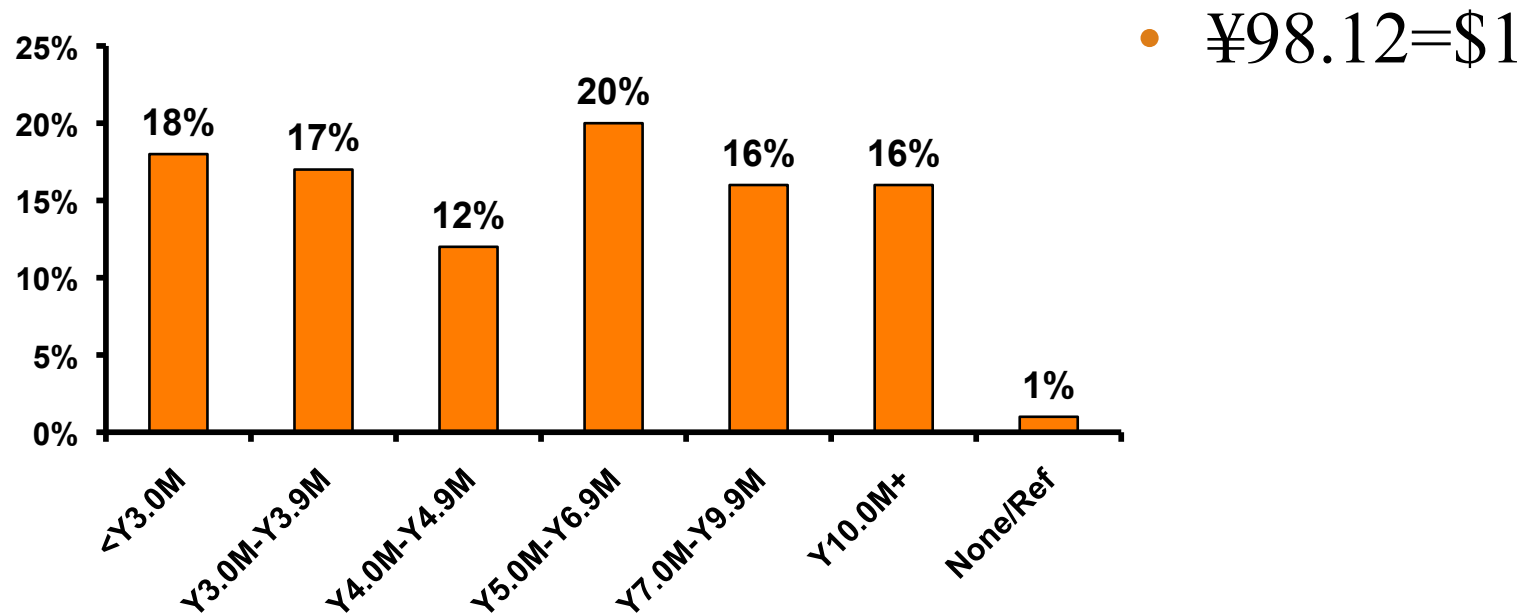


- The average age of the respondents is 33.91 years of age.

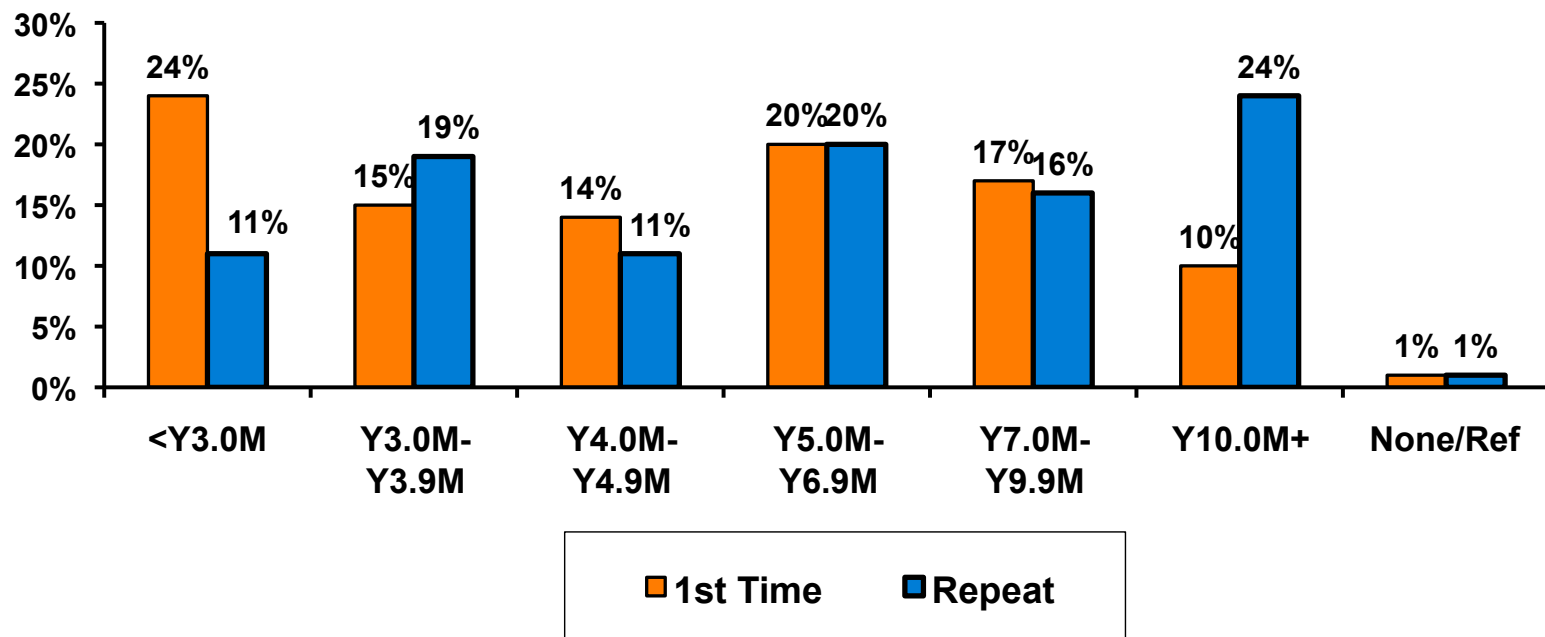
Average Age



Personal Income



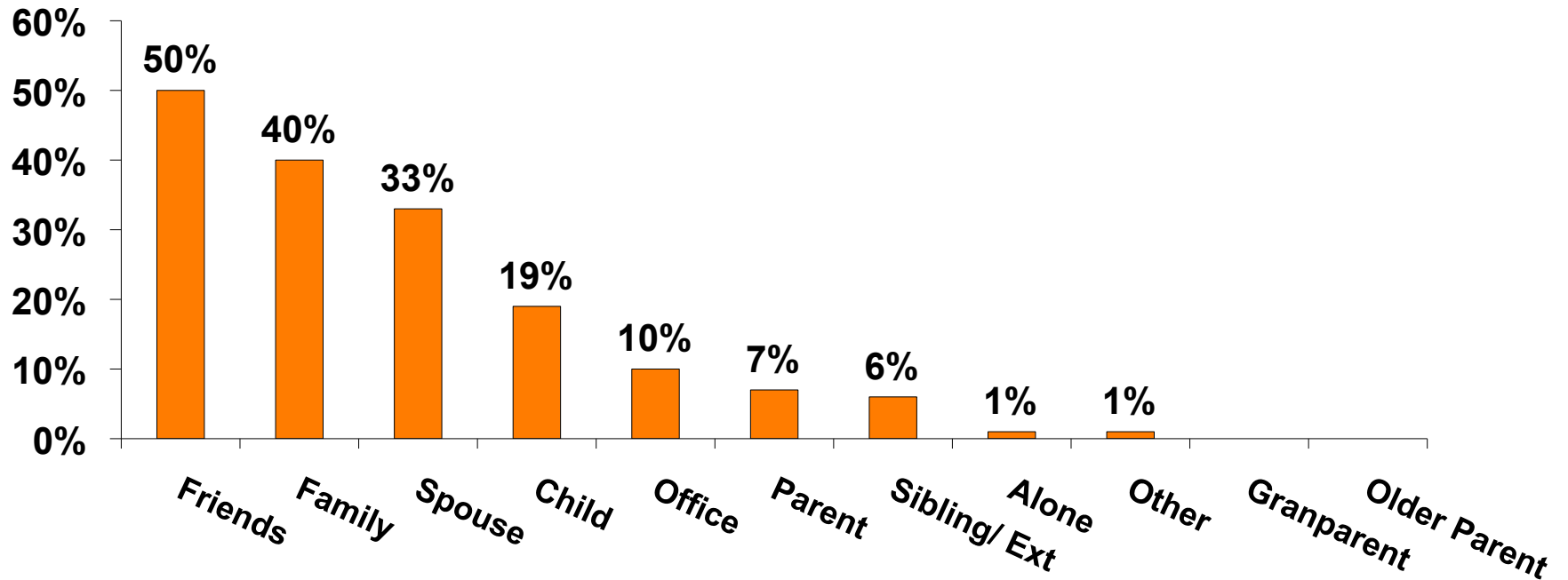
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	21	5	16	10	9	1	1
		Column N %	7%	3%	11%	17%	7%	1%	3%
	Y2.0M-Y3.0M	Count	36	6	30	12	21	2	1
		Column N %	11%	4%	20%	20%	17%	2%	3%
	Y3.0M-Y4.0M	Count	54	16	38	12	30	6	6
		Column N %	17%	10%	25%	20%	25%	6%	15%
	Y4.0M-Y5.0M	Count	39	24	15	2	21	13	3
		Column N %	12%	14%	10%	3%	17%	13%	8%
	Y5.0M-Y7.0M	Count	64	48	16	8	16	28	12
		Column N %	20%	29%	11%	14%	13%	29%	31%
	Y7.0M-Y10.0M	Count	52	32	20	7	14	23	8
		Column N %	16%	19%	13%	12%	11%	24%	21%
	Y10.0M+	Count	50	36	14	6	11	24	8
		Column N %	16%	21%	9%	10%	9%	25%	21%
	No Income	Count	2	1	1	2			
		Column N %	1%	1%	1%	3%			
	Total	Count	318	168	150	59	122	97	39

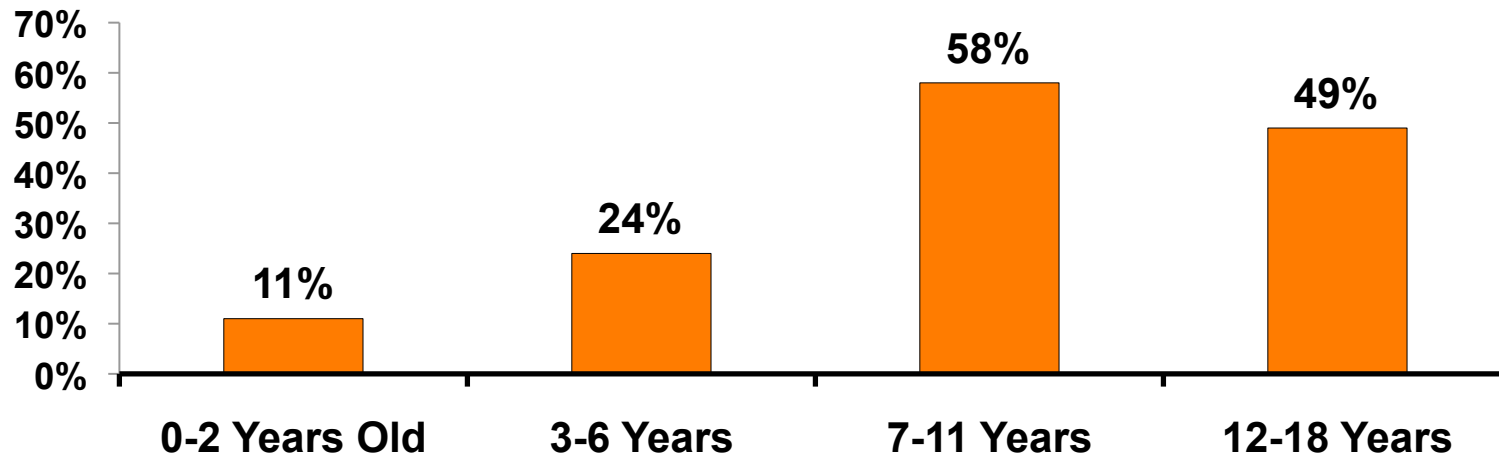
Travel Companions



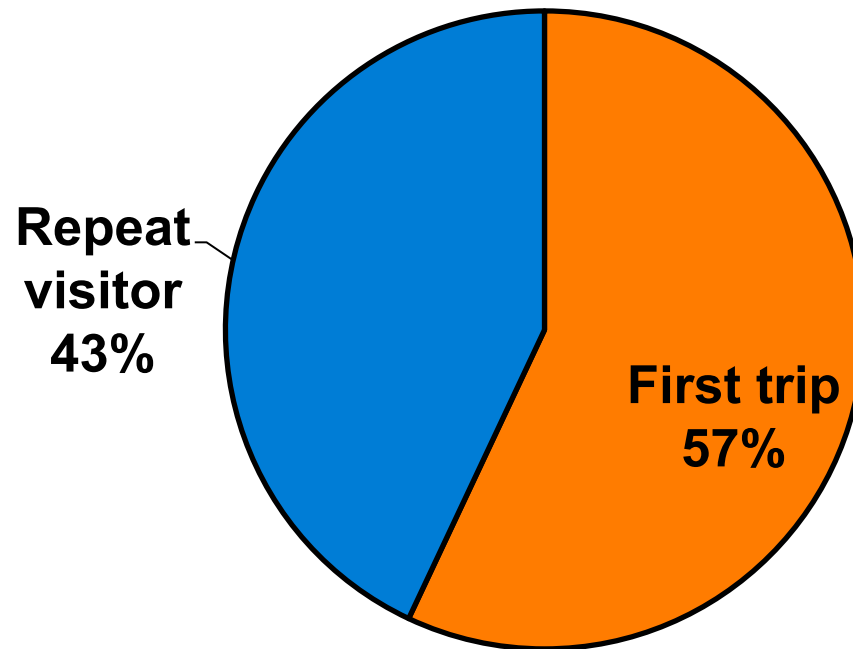
Number of Children Travel Party

N=66 total respondents traveling with children.

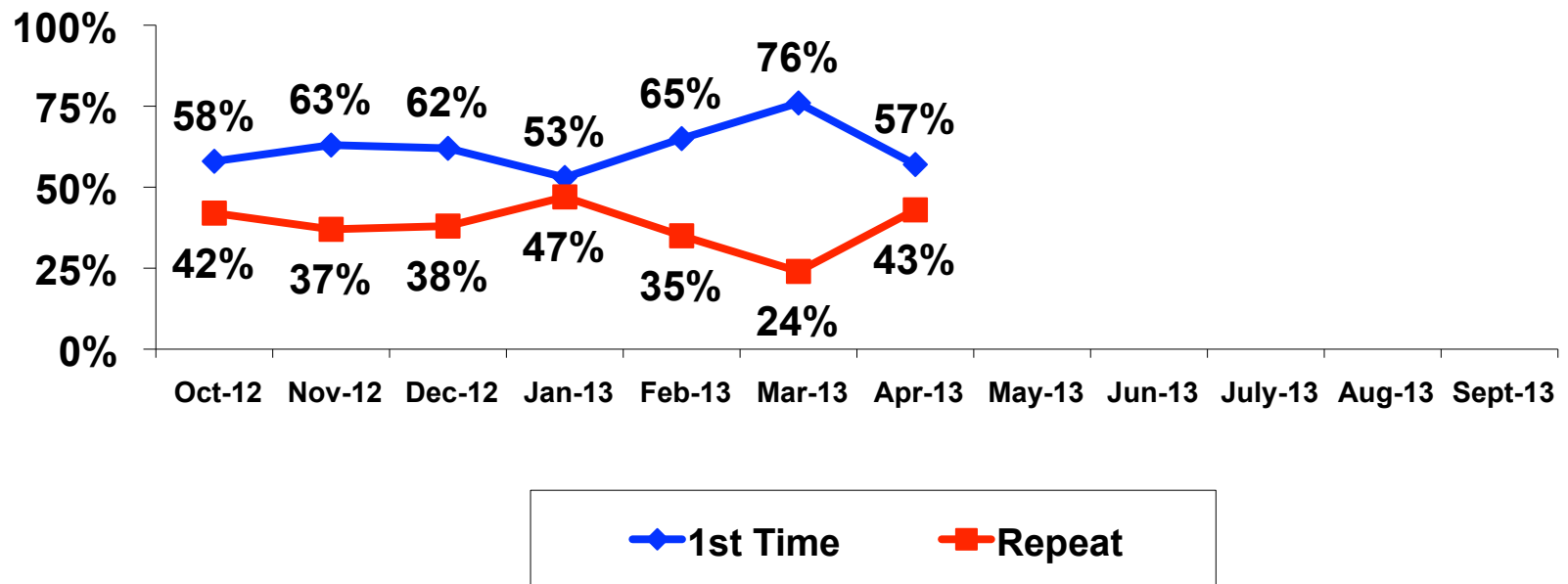
(Of those N=66 respondents, there is a total of 101 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



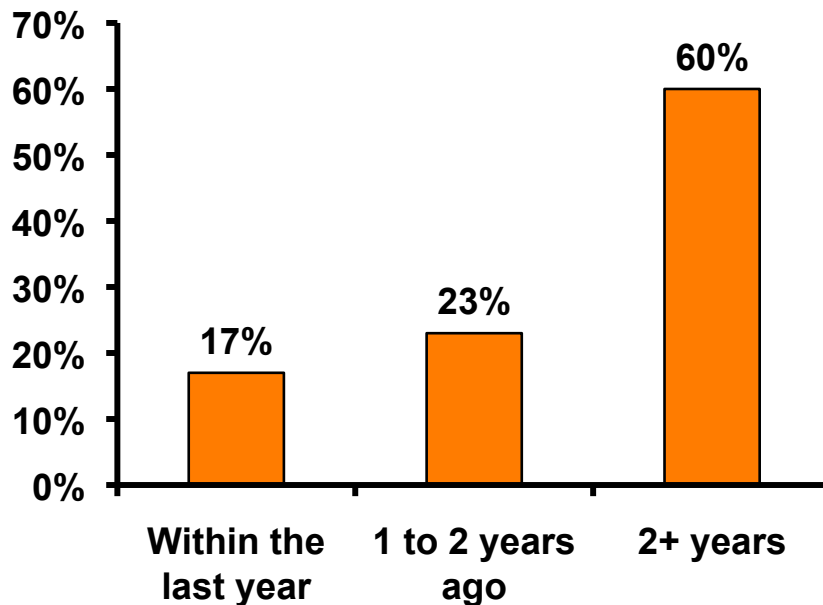
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	177	85	91	
		Column N %	50%	43%	61%	
	Female	Count	174	112	59	
		Column N %	50%	57%	39%	
Total		Count	351	197	150	
AGE	18-24	Count	77	53	23	
		Column N %	22%	27%	16%	
	25-34	Count	133	88	43	
		Column N %	38%	45%	29%	
	35-49	Count	97	34	62	
		Column N %	28%	17%	42%	
	50+	Count	40	21	19	
		Column N %	12%	11%	13%	
	Total		Count	347	196	147

- First-time visitors are younger than repeat visitors to Guam.

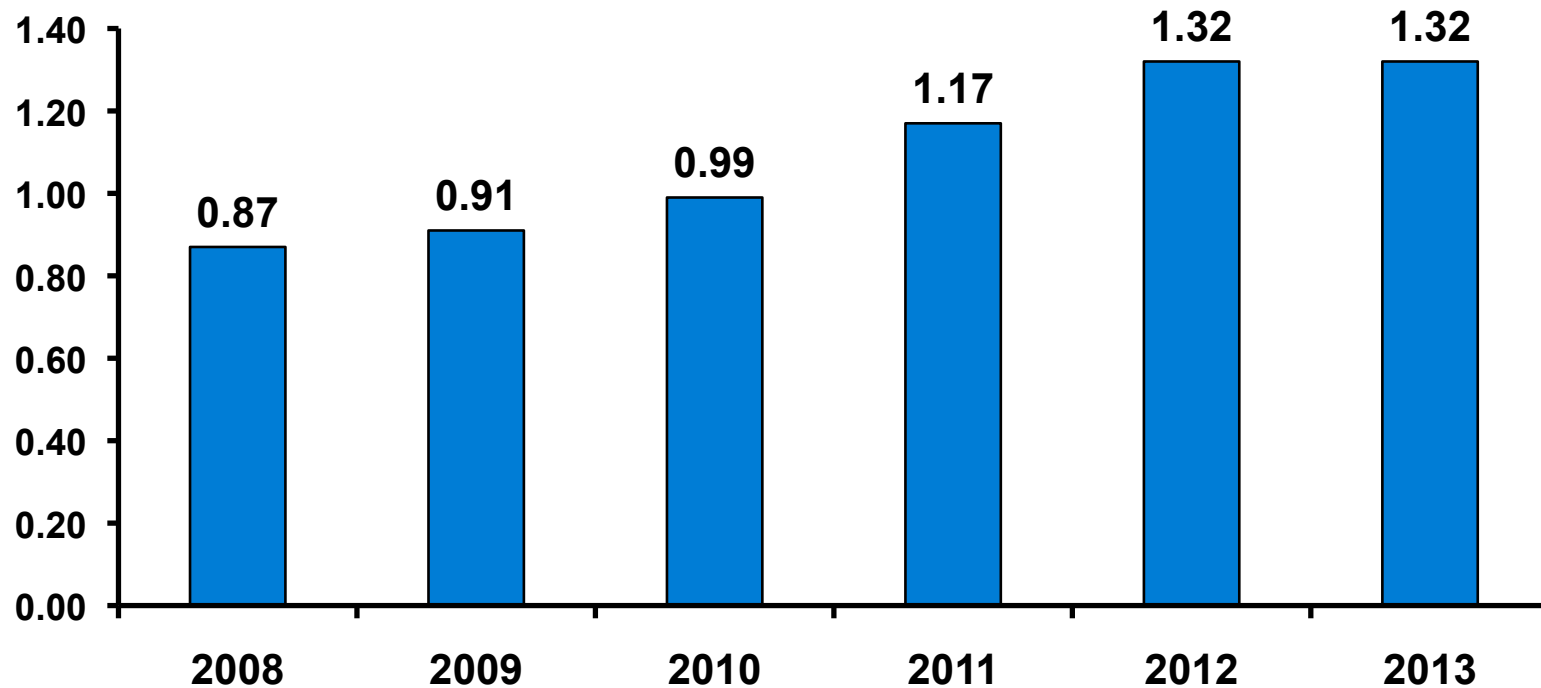
Repeat Visitors Last Trip

n = 149



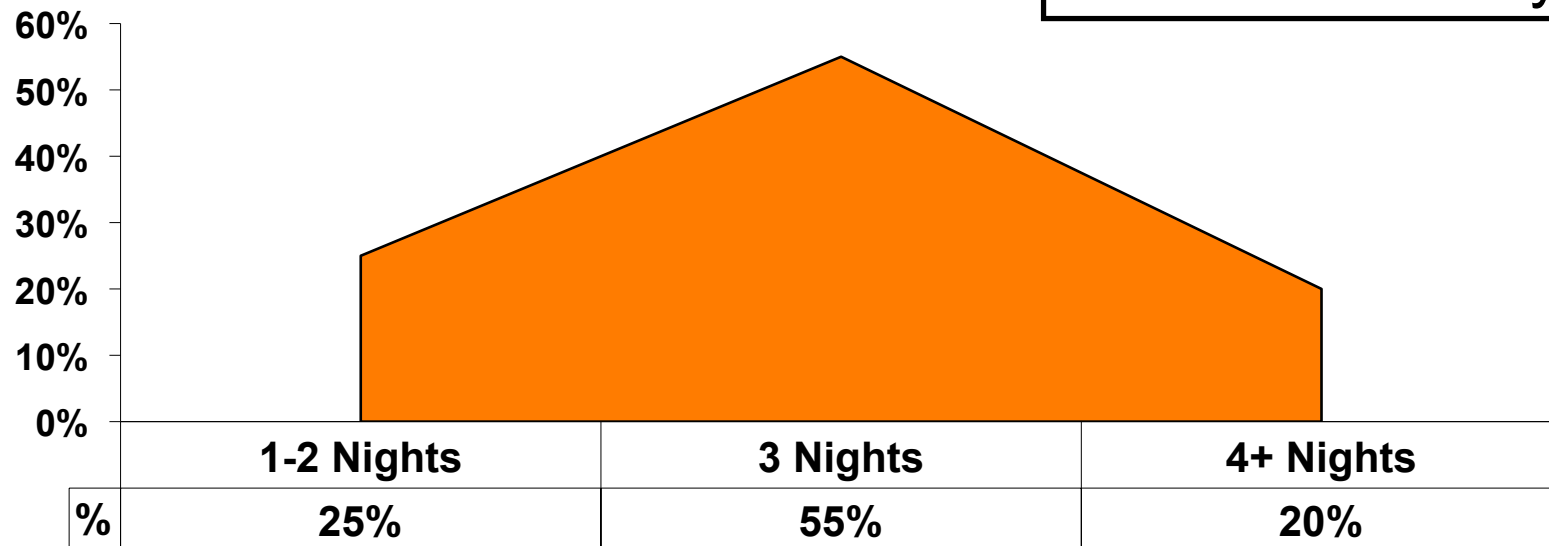
- The average repeat visitor has been to Guam 4.09 times.
- Less than half the repeat visitors have been to Guam within the last 2 years.

Average Number Overnight Trips (2008-2013) (2 nights or more)

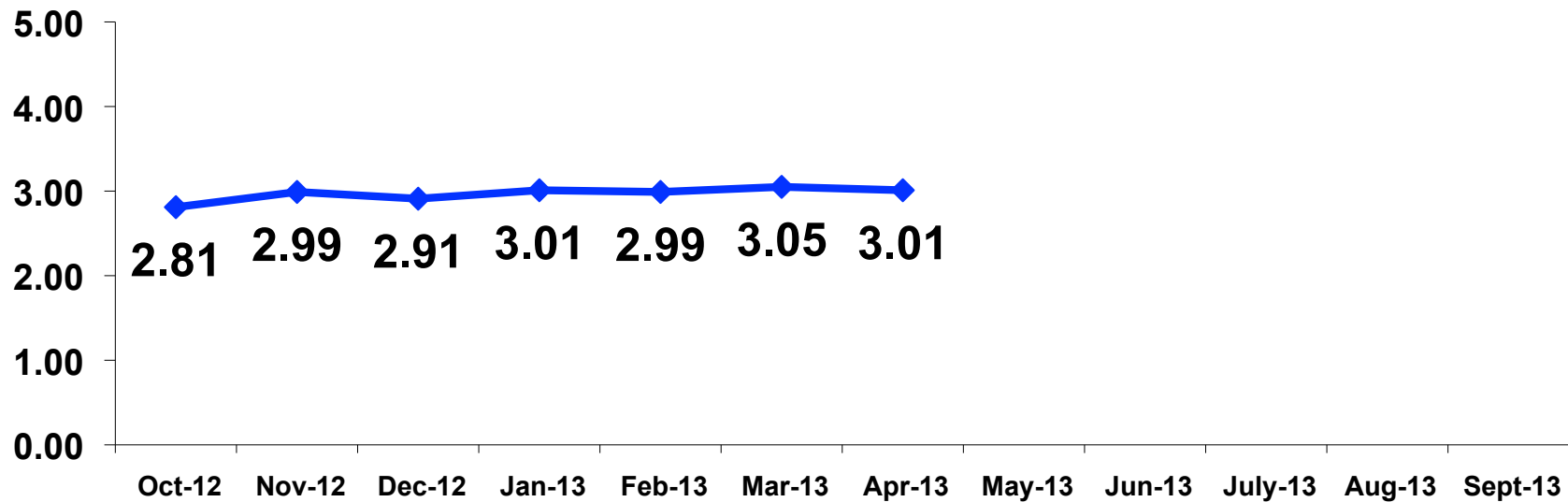


Length of Stay

Mean = 3.01 Days
Median = 3.0 Days



Average Length of Stay

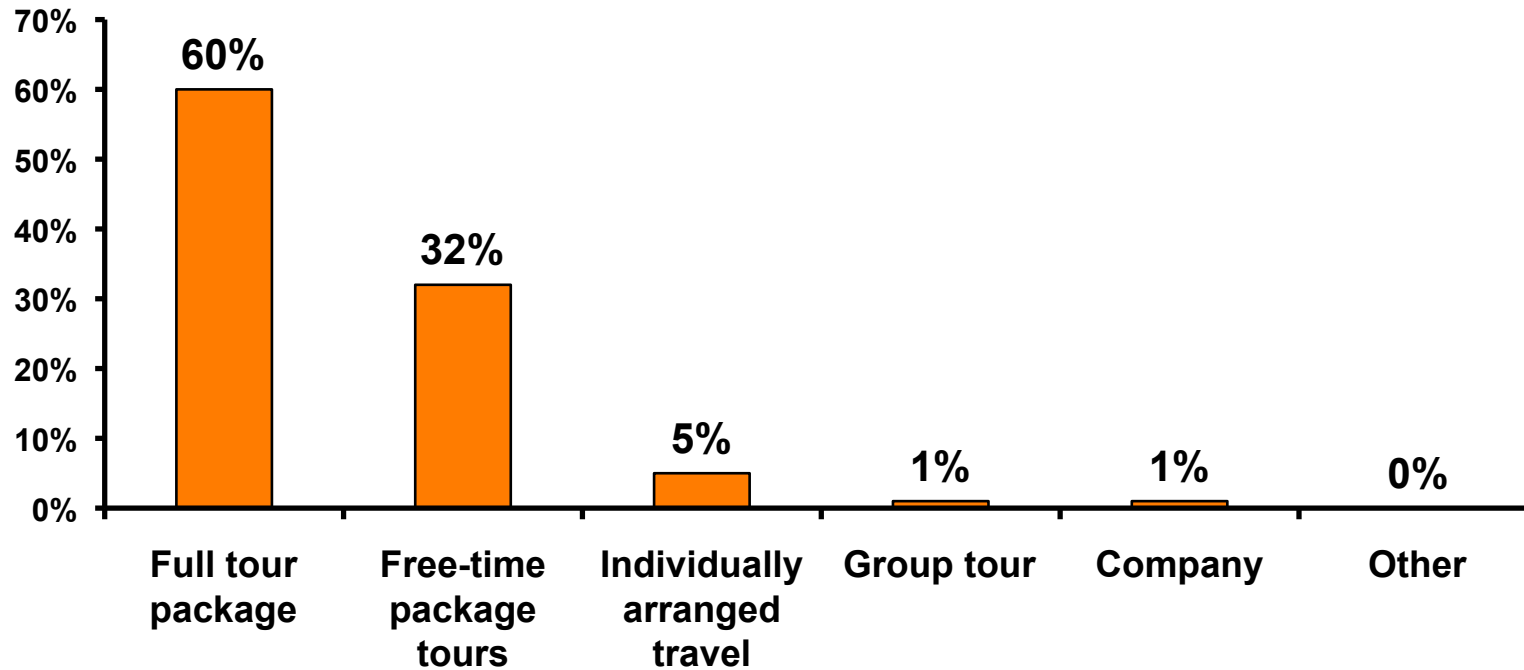


Occupation by Income

		TOTAL	Q26							No Income	
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+		
Q25	Office worker non-mgr	17%	14%	47%	30%	13%	9%	12%	6%		
	Engineer	14%		14%	11%	23%	20%	6%	10%		
	Salesperson	12%	5%	8%	11%	18%	16%	17%	6%		
	Self-employed	11%	10%	3%	7%	5%	13%	13%	26%		
	Student	8%	14%	6%	2%	3%	11%		8%	50%	
	Freeter	8%	33%	6%	7%	5%		12%	4%		
	Manager	8%				8%	13%	15%	16%		
	Homemaker	5%				15%	3%	10%	6%		
	Skilled worker	5%	5%	14%	9%	3%	2%	2%	2%		
	Professional/ Specialist	3%	5%	3%	6%	3%	2%		4%		
	Executive (30+ employees)	3%					2%	6%	10%		
	Other	2%			4%		3%	2%		50%	
	Unemployed	2%	10%		4%		2%	2%			
	Retired	1%			2%	3%	3%	2%			
	Teacher	1%	5%		4%				2%		
	Free-lancer	1%			2%		3%				
	Govt- office worker non-mgr	1%			2%	3%		2%			
	Total	Count	343	21	36	54	39	64	52	50	2

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

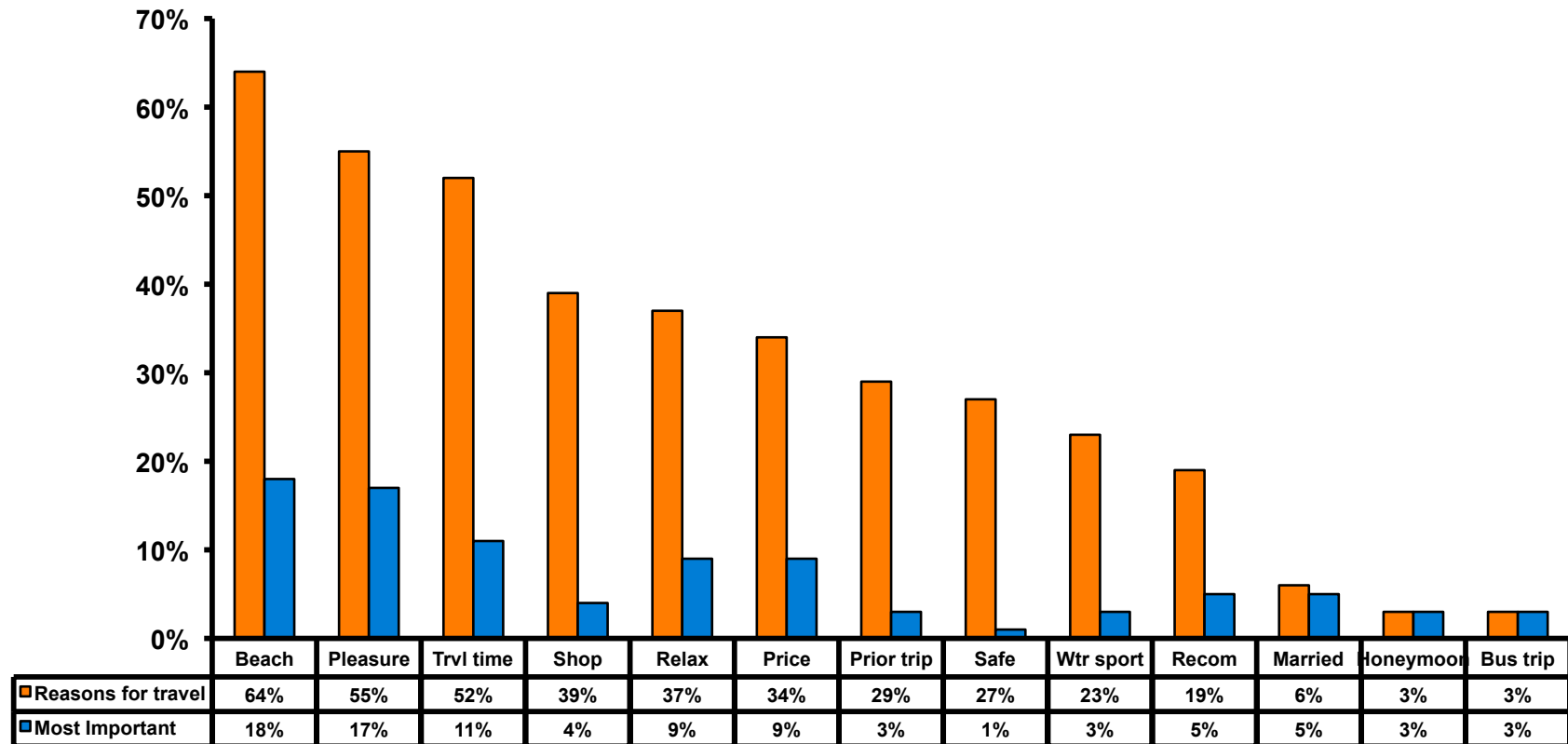


Accommodation by Income

Average length of stay: 3.01 days

		TOTAL	Q26								
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q9	Guam Plaza Hotel	18%	19%	28%	22%	24%	13%	15%	14%		
	Guam Reef Hotel	9%	5%		11%	11%	11%	6%	20%		
	Pacific Bay Hotel	9%	14%	14%	2%	8%	5%	10%	6%	100%	
	Outrigger Guam Resort	8%	10%	14%	6%	11%	13%	2%	8%		
	PIC Club	7%			9%	3%	8%	15%	6%		
	Hotel Santa Fe	6%	14%	6%	11%	3%	6%	4%	4%		
	Hilton Guam Resort	6%	5%	6%	2%	8%	6%	10%	10%		
	Hotel Nikko Guam	5%	5%	6%		8%	5%	8%	8%		
	Fiesta Resort Guam	4%		6%	4%	3%	3%	10%	4%		
	Grand Plaza Hotel	4%	14%	8%	4%				2%		
	Onward Beach Resort	4%			6%	3%	6%	6%	4%		
	Guam Marriott Resort	3%		3%	2%		6%		4%		
	Royal Orchid Guam	3%		6%		3%	3%	6%			
	Oceanview Hotel	3%	5%	3%	7%	3%	3%				
	Sheraton Laguna Guam	2%			2%		5%	4%	2%		
	Bayview Hotel	2%	5%		6%	3%			2%		
	Hyatt Regency Guam	2%				3%	3%	2%	4%		
	Leo Palace Resort	1%			2%	5%	2%	2%			
	Westin Resort Guam	1%			2%			2%	2%		
	Tumon Bay Capital Hotel	1%				3%	2%				
	Other	1%	5%		2%						
	Holiday Resort Guam	1%			2%		2%				
	Home stay/ friend/ relative	0%		3%							
	Guam Aurora Resort	0%				3%					
	Total	Count	350	21	36	54	38	64	52	50	2

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure
- Short travel time

are the primary reasons for visiting during this period.

Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty	64%	69%	67%	64%	53%	61%	68%	
	Pleasure	55%	62%	58%	56%	32%	50%	60%	
	Short travel time	52%	42%	48%	68%	50%	56%	48%	
	Shopping	39%	51%	44%	30%	24%	29%	48%	
	Relax	37%	39%	34%	41%	37%	37%	37%	
	Price	34%	35%	29%	41%	34%	35%	33%	
	Previous trip	29%	16%	23%	47%	26%	35%	22%	
	Safe	27%	22%	26%	36%	18%	28%	26%	
	Water sports	23%	29%	22%	24%	21%	23%	24%	
	Recomm- friend/family/trvl agnt	19%	30%	16%	12%	24%	16%	21%	
	Married/ Attn wedding	6%	1%	9%	2%	13%	9%	2%	
	Other	3%	5%	5%	2%		3%	3%	
	Honeymoon	3%	3%	5%	1%		5%	1%	
	Company/ Business Trip	3%	4%	2%	3%	3%	3%	2%	
	Golf	3%		4%	3%	5%	5%	1%	
	Scuba	3%	1%	5%	1%	5%	3%	2%	
	Organized sports	2%	4%	1%	2%	3%	1%	4%	
	Visit friends/ Relatives	1%	1%	2%		5%	1%	2%	
	Total	Count	349	77	133	97	38	177	172

Motivation by Income

		TOTAL	Q26							
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q5A	Natural beauty	64%	62%	66%	59%	62%	64%	67%	70%	50%
	Pleasure	55%	81%	57%	56%	49%	53%	51%	50%	50%
	Short travel time	52%	57%	37%	41%	56%	55%	57%	66%	50%
	Shopping	39%	48%	40%	48%	31%	36%	33%	40%	50%
	Relax	37%	43%	34%	35%	31%	36%	43%	42%	
	Price	34%	33%	26%	39%	41%	36%	39%	32%	
	Previous trip	29%	19%	11%	28%	31%	33%	31%	38%	
	Safe	27%	33%	40%	28%	28%	22%	22%	30%	
	Water sports	23%	29%	29%	17%	5%	27%	31%	30%	
	Recomm- friend/family/trvl agnt	19%	33%	11%	13%	23%	19%	22%	14%	50%
	Married/ Attn wedding	6%	5%	3%	4%	13%	8%	6%	4%	
	Other	3%		9%	7%	3%	2%	2%	2%	
	Honeymoon	3%		3%	4%	5%	5%			
	Company/ Business Trip	3%			4%	3%	3%	2%	4%	50%
	Golf	3%			6%		6%	4%	2%	
	Scuba	3%	5%	3%	4%	3%	2%	2%	4%	
	Organized sports	2%		6%	4%		2%		4%	
	Visit friends/ Relatives	1%			2%	3%	2%		2%	
	Total Count	349	21	35	54	39	64	51	50	2

SECTION 3 **EXPENDITURES**

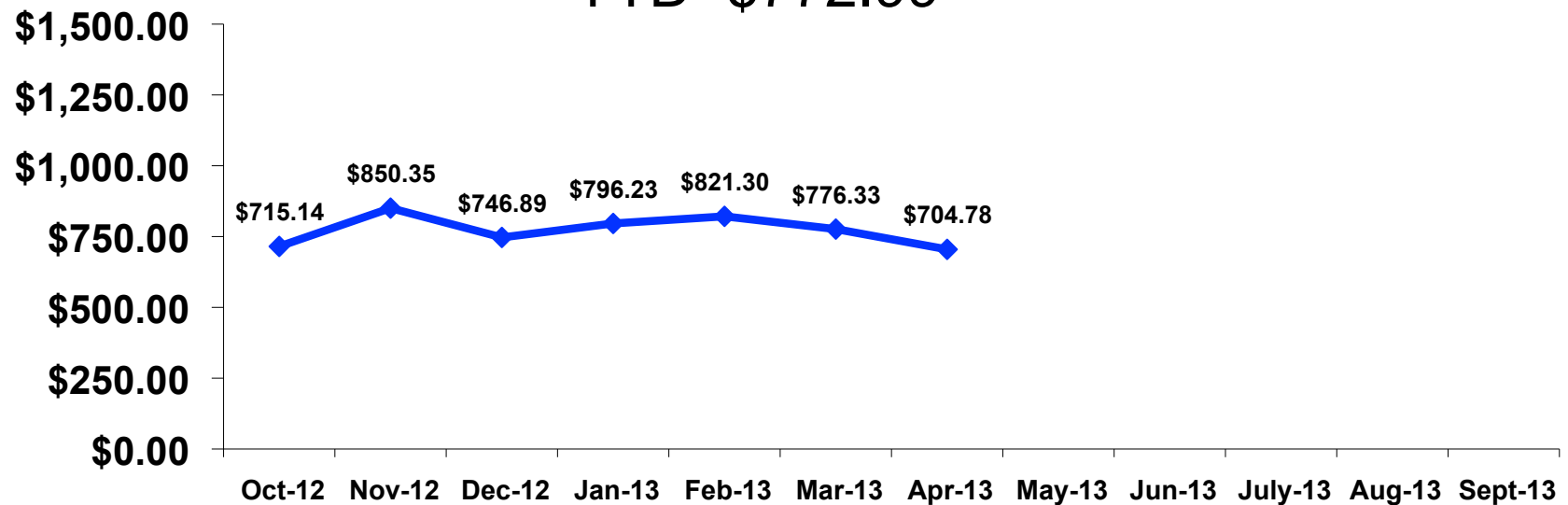
Prepaid Expenditures

¥98.12/US\$1

- \$1,722.22 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$25,479 = maximum (highest amount recorded for the entire sample)
- \$704.78 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person

YTD=\$772.99



Breakdown of Prepaid Expenditures

¥98.12=\$1

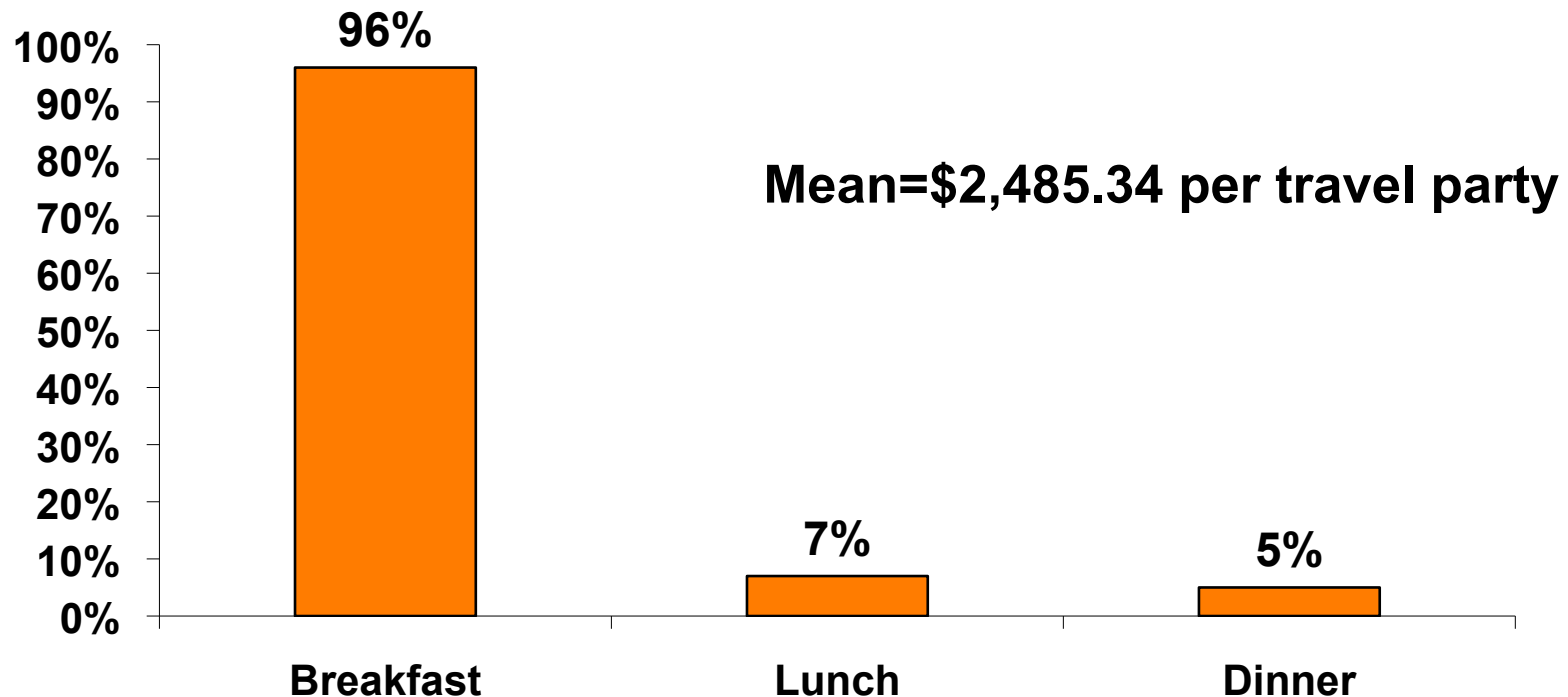
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,361.48
Air & Accommodation w/ daily meal package	\$2,485.34
Air only	\$2,284.62
Accommodation only	\$7,134.12
Accommodation w/ daily meal only	\$1,528.74
Food & Beverages in Hotel	\$-
Ground transportation - Japan	\$77.51
Ground transportation - Guam	\$95.55
Optional tours/ activities	\$259.85
Other expenses	\$1,023.86
Total Prepaid	\$1,722.22

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

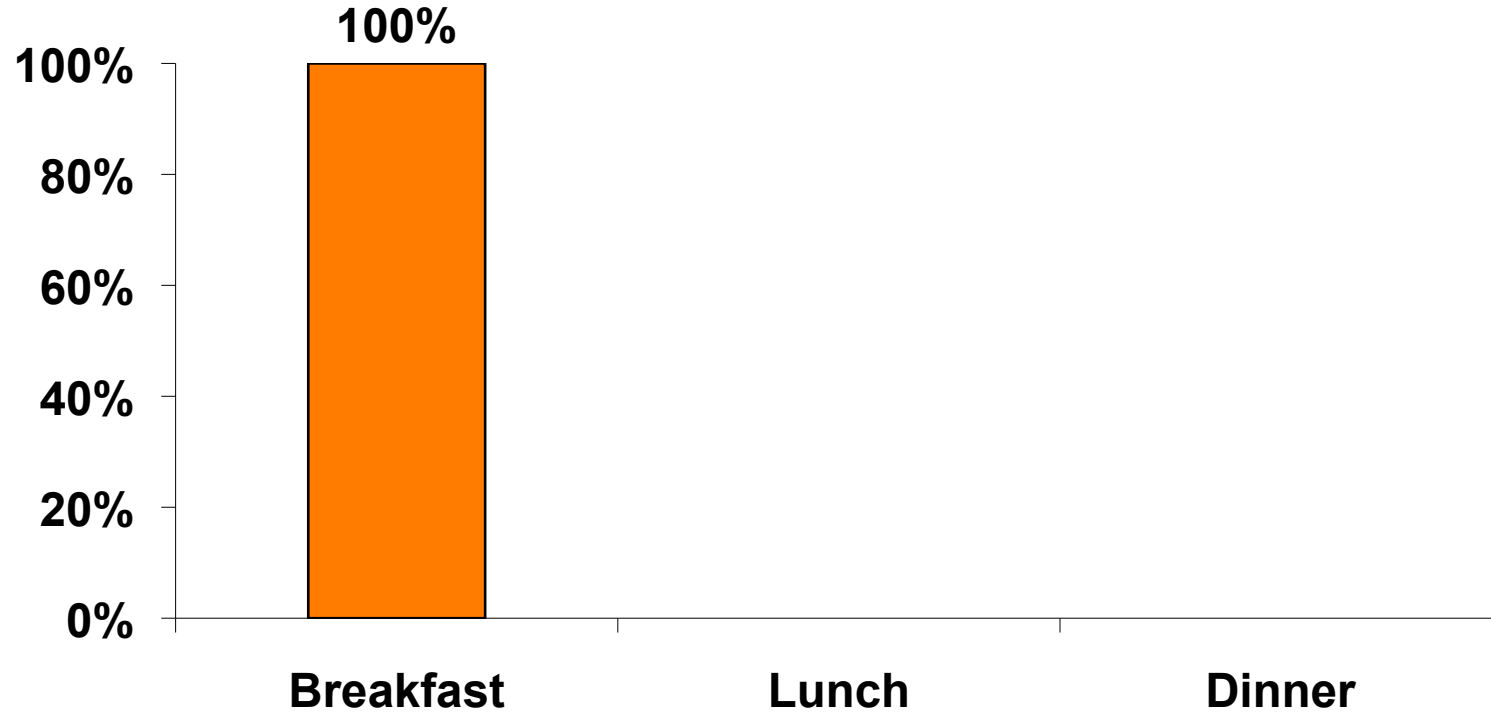
n=102



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

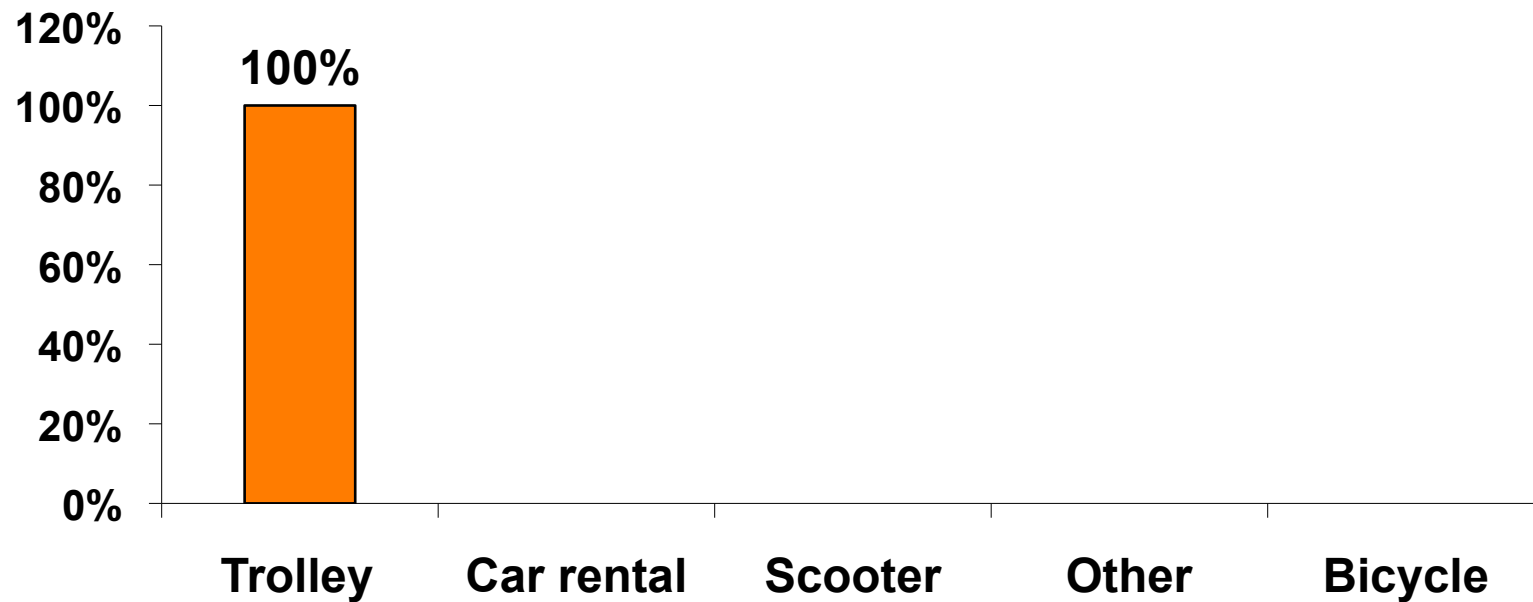
n=1



Mean=\$1,528.74 per travel party

Prepaid Ground Transportation

n=2



Mean=\$95.55 per travel party

On-Island Expenditures

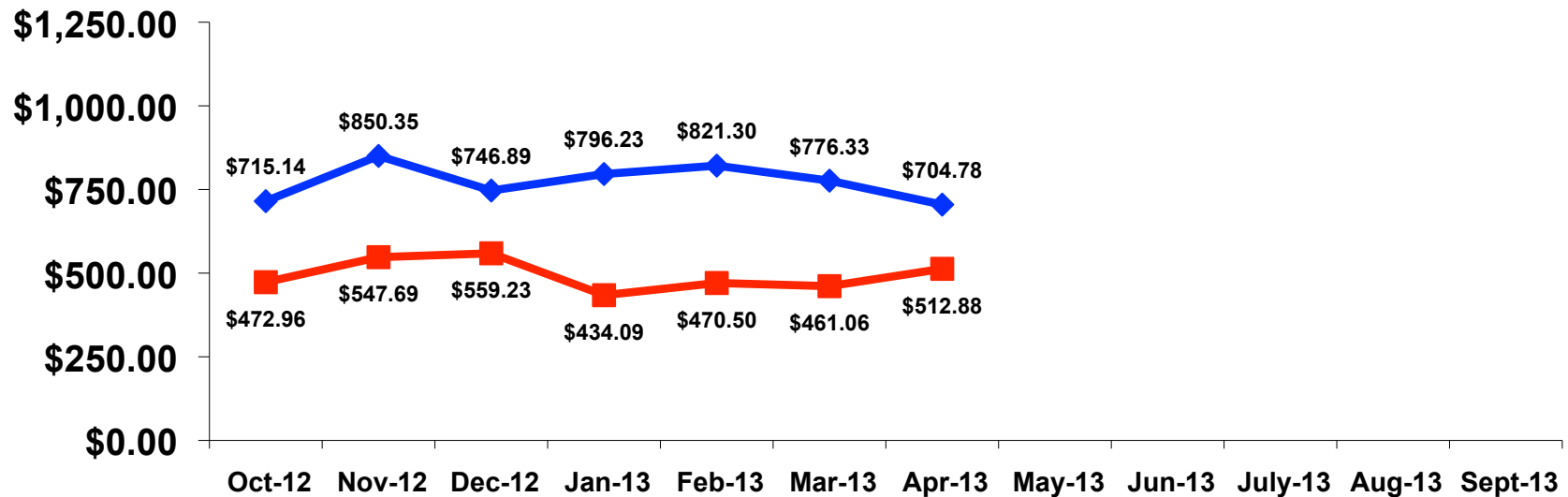
- \$867.59 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$15,000 = Maximum (highest amount recorded for the entire sample)
- \$512.88 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person



Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$772.99 On-Island YTD = \$494.05



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
			-	Male	Female	Male				Female		
		AGE				AGE						
		18-24				25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$512.88	\$508.82	\$517.00	\$542.15	\$386.50	\$632.02	\$394.27	\$500.83	\$579.98	\$411.58	\$479.67
	Median	\$400	\$380	\$400	\$475	\$342	\$400	\$333	\$440	\$500	\$374	\$450
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$50	\$150
	Maximum	\$8,000	\$8,000	\$3,000	\$2,000	\$1,000	\$8,000	\$1,000	\$1,408	\$3,000	\$1,230	\$1,000

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$66.21	\$107.20	\$24.76	\$19.34	\$18.93	\$157.83	\$100.40
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$15
F&B FF/STORE	Mean	\$37.73	\$52.89	\$22.40	\$21.91	\$18.68	\$74.20	\$47.75
	Median	\$10	\$20	\$0	\$0	\$0	\$35	\$20
F&B RESTRNT	Mean	\$84.13	\$118.17	\$49.70	\$33.05	\$61.63	\$138.57	\$135.00
	Median	\$20	\$55	\$0	\$0	\$0	\$90	\$100
OPT TOUR	Mean	\$74.32	\$93.11	\$55.32	\$73.94	\$57.17	\$83.44	\$117.65
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$34
GIFT- SELF	Mean	\$264.87	\$340.67	\$187.75	\$161.55	\$182.67	\$501.66	\$193.20
	Median	\$50	\$55	\$30	\$50	\$18	\$105	\$30
GIFT- OTHER	Mean	\$145.80	\$197.31	\$93.70	\$85.36	\$117.92	\$231.33	\$164.13
	Median	\$68	\$100	\$50	\$50	\$30	\$100	\$100
TRANS	Mean	\$19.68	\$29.92	\$9.32	\$6.87	\$19.32	\$37.78	\$4.05
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$180.77	\$174.57	\$187.07	\$201.55	\$187.83	\$132.09	\$220.90
	Median	\$0	\$0	\$0	\$10	\$0	\$0	\$0
TOTAL	Mean	\$867.59	\$1,102.83	\$628.29	\$604.60	\$661.29	\$1,343.25	\$960.58
	Median	\$572	\$750	\$500	\$450	\$500	\$800	\$800

On-Island Expenditures

First Timers & Repeaters

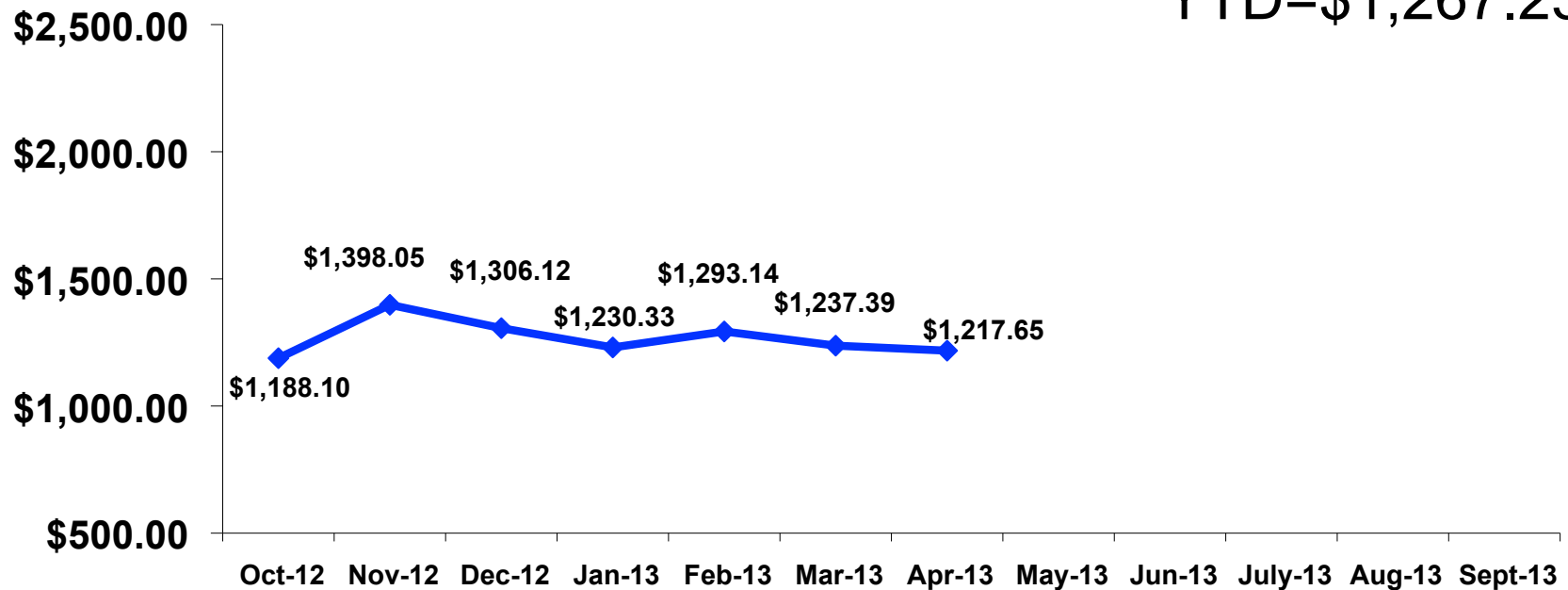
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$66.21	\$71.99	\$60.43
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$37.73	\$32.13	\$45.05
	Median	\$10	\$7	\$10
F&B RESTRNT	Mean	\$84.13	\$69.55	\$105.42
	Median	\$20	\$15	\$43
OPT TOUR	Mean	\$74.32	\$74.62	\$72.59
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$264.87	\$202.32	\$349.57
	Median	\$50	\$40	\$75
GIFT- OTHER	Mean	\$145.80	\$172.74	\$109.82
	Median	\$68	\$60	\$73
TRANS	Mean	\$19.68	\$12.59	\$28.60
	Median	\$0	\$0	\$0
OTHER	Mean	\$180.77	\$176.61	\$189.91
	Median	\$0	\$0	\$0
TOTAL	Mean	\$867.59	\$808.30	\$953.93
	Median	\$572	\$582	\$586

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,217.65 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,561 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

YTD=\$1,267.25

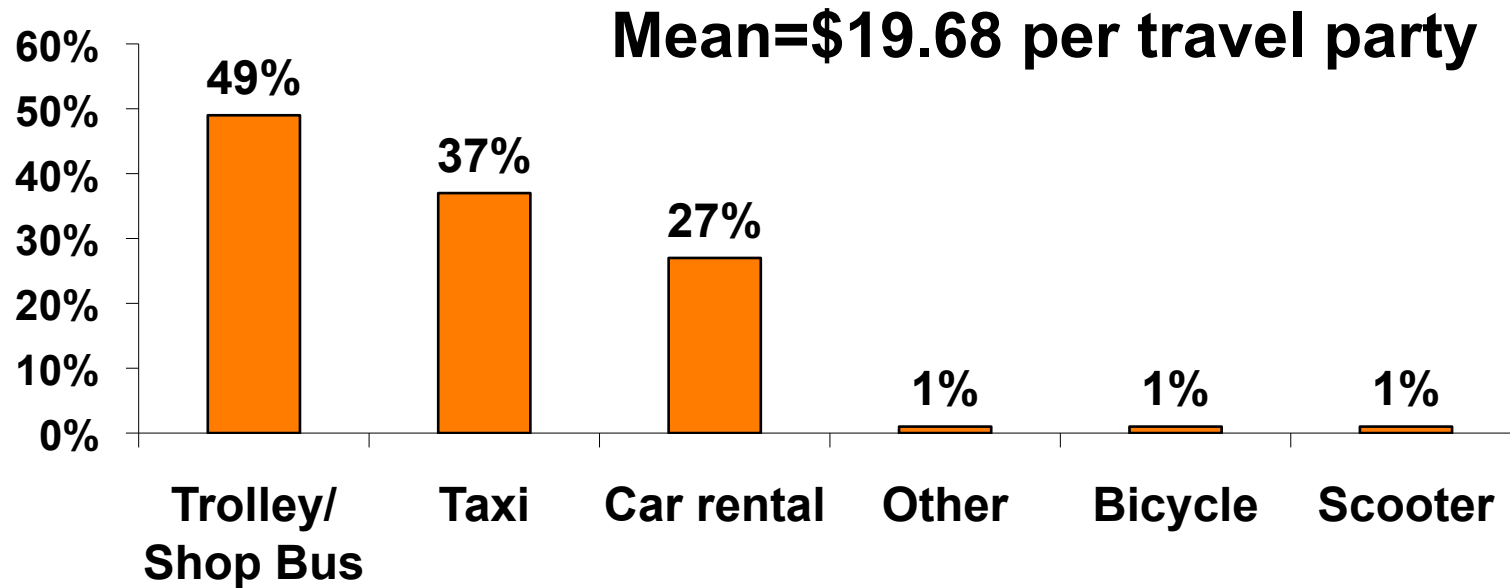


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$66.21
Food & beverage in fast food restaurant/ convenience store	\$37.73
Food & beverage at restaurants or drinking establishments outside a hotel	\$84.13
Optional tours and activities	\$74.32
Gifts/ souvenirs for yourself/companions	\$264.87
Gifts/ souvenirs for friends/family at home	\$145.80
Local transportation	\$19.68
Other expenses not covered	\$180.77
Average Total	\$867.59

Local Transportation

n=86



Guam Airport Expenditures

- \$28.04 = Mean
- \$5 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$600 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

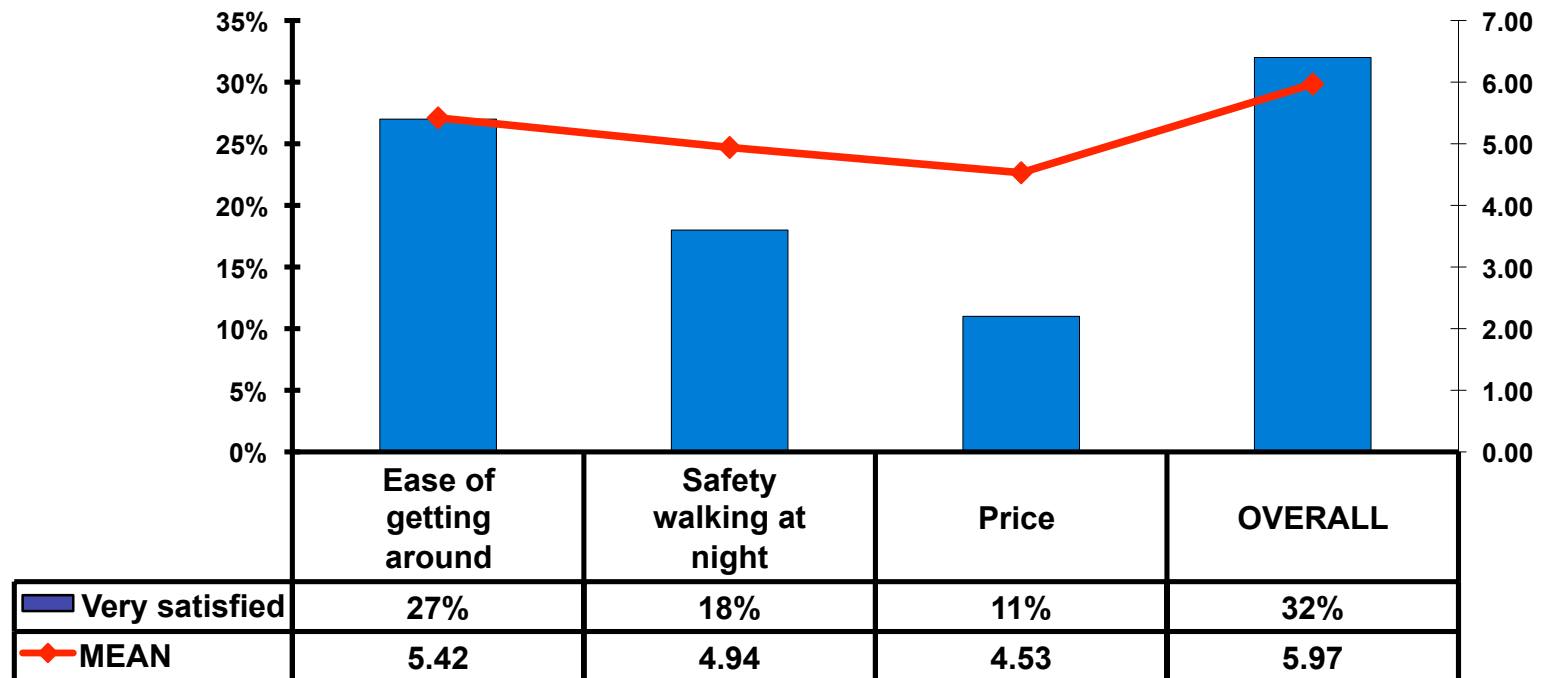
	MEAN \$
Food & Beverages	\$7.55
Gifts/Souvenirs Self	\$9.90
Gifts/Souvenirs Others	\$10.59
Total	\$28.04

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

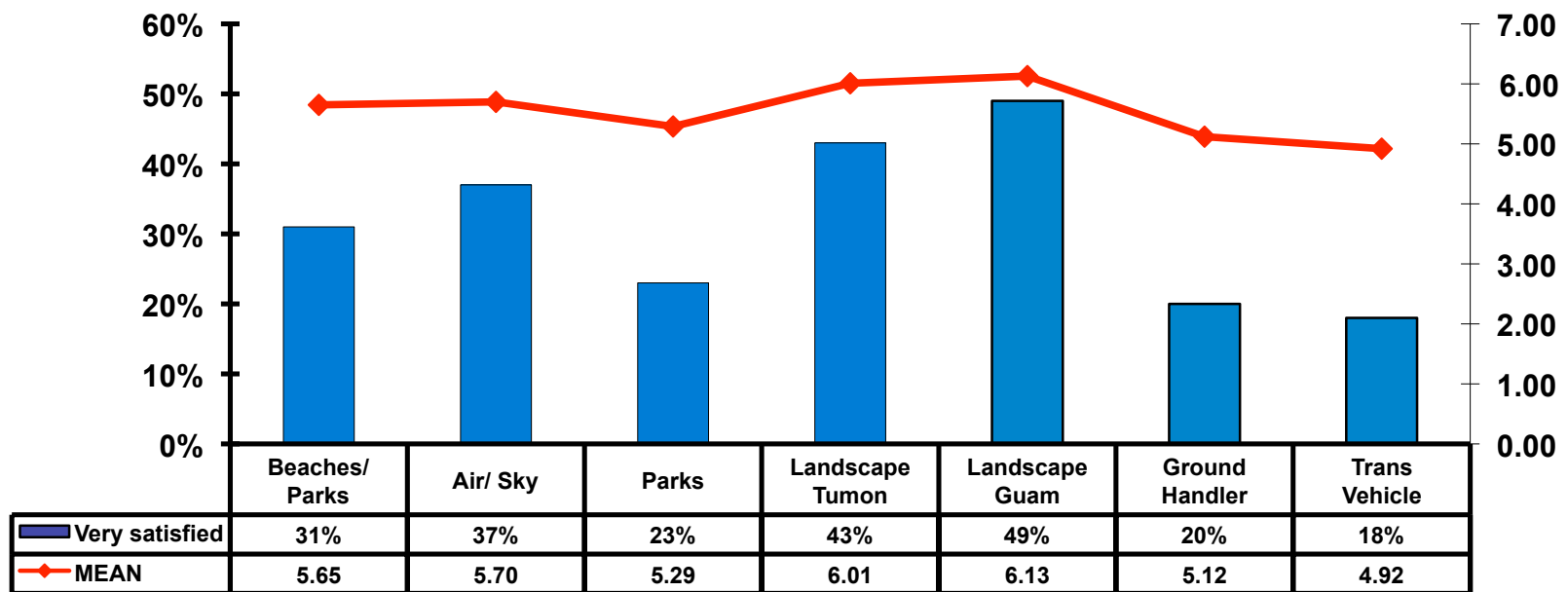
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

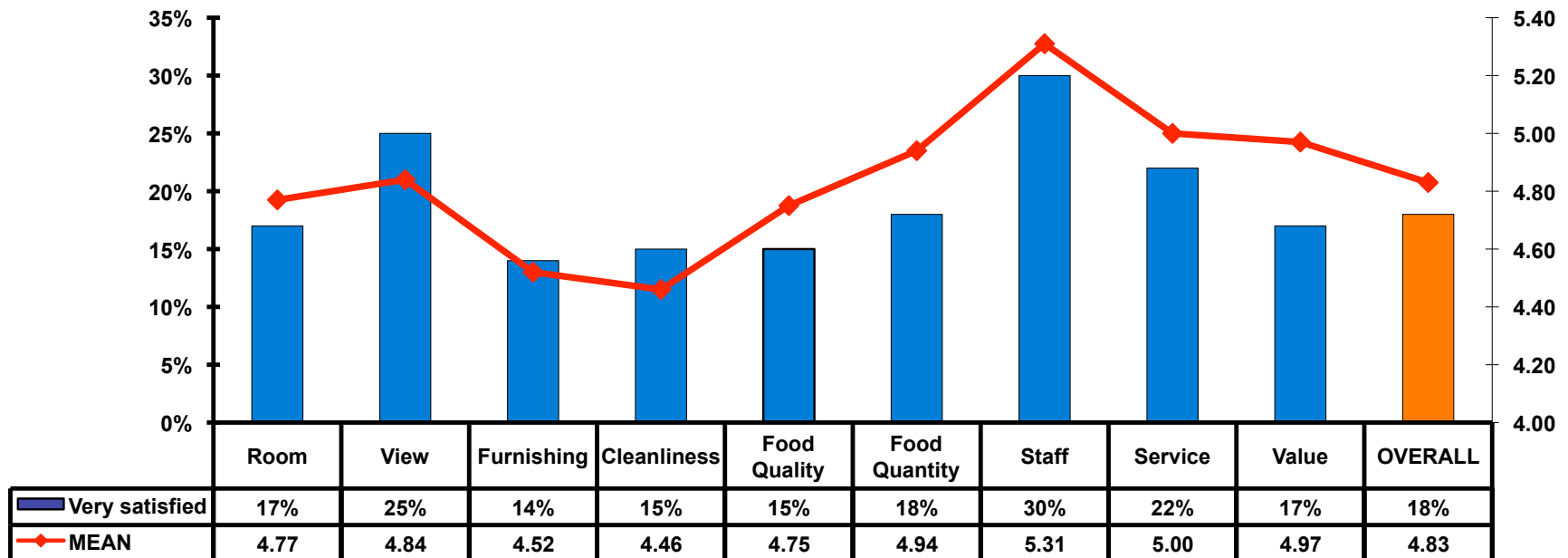
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

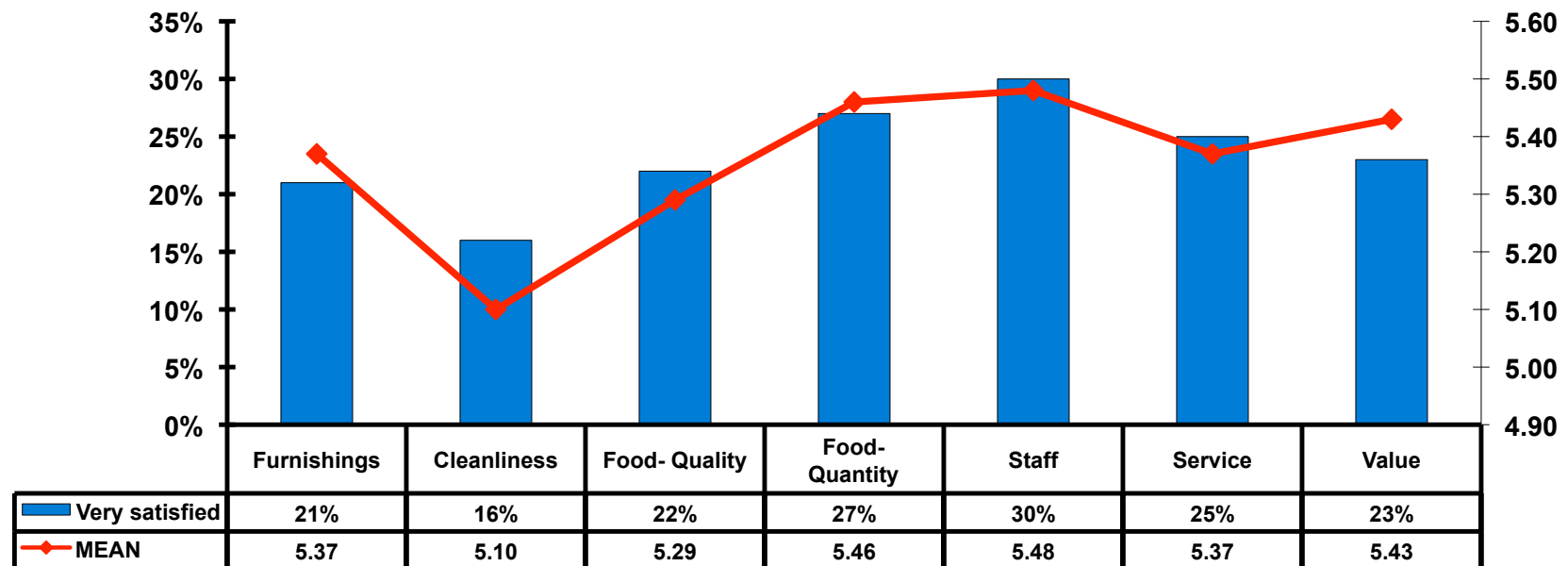
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

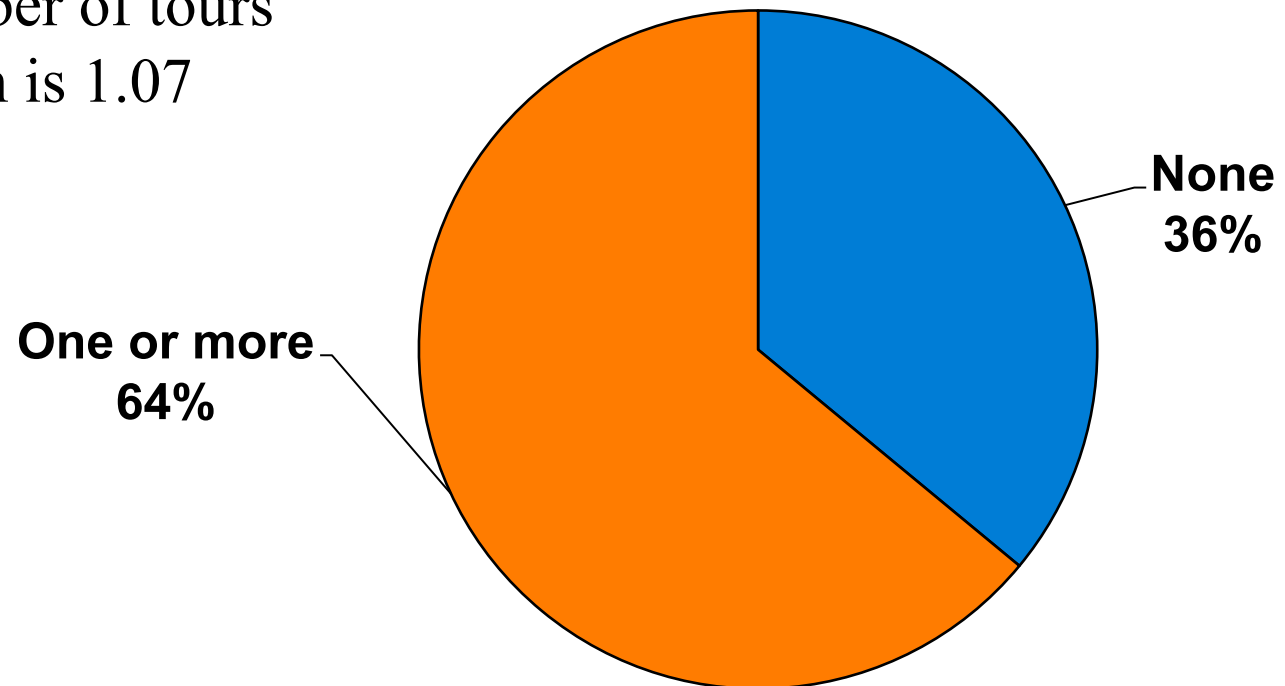
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

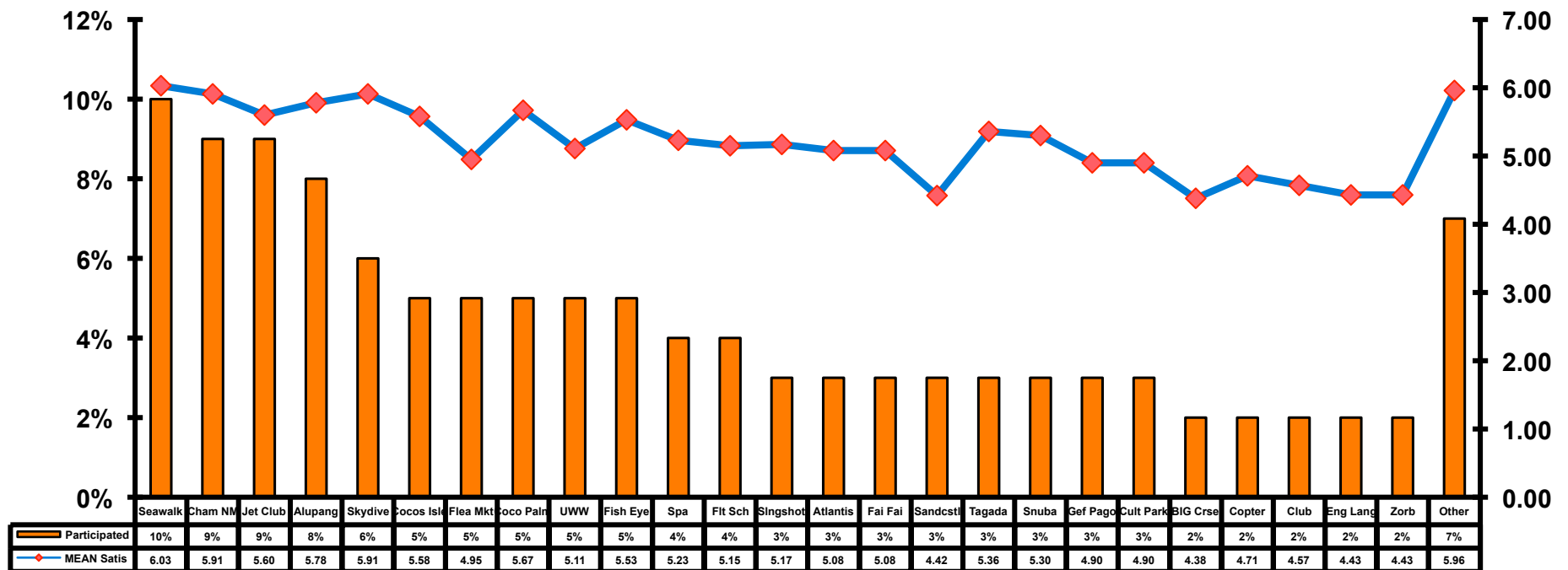
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 56%	Score of 6 to 7 = 52%
Score of 4 to 5 = 40%	Score of 4 to 5 = 42%
Score 1 to 3 = 5%	Score 1 to 3 = 6%
MEAN = 5.50	MEAN = 5.39

Optional Tour Participation

- Average number of tours participated in is 1.07



Optional Tours Participation & Satisfaction



Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 57%	Score of 6 to 7 = 55%
Score of 4 to 5 = 41%	Score of 4 to 5 = 43%
Score 1 to 3 = 2%	Score 1 to 3 = 2%
MEAN = 5.55	MEAN = 5.51

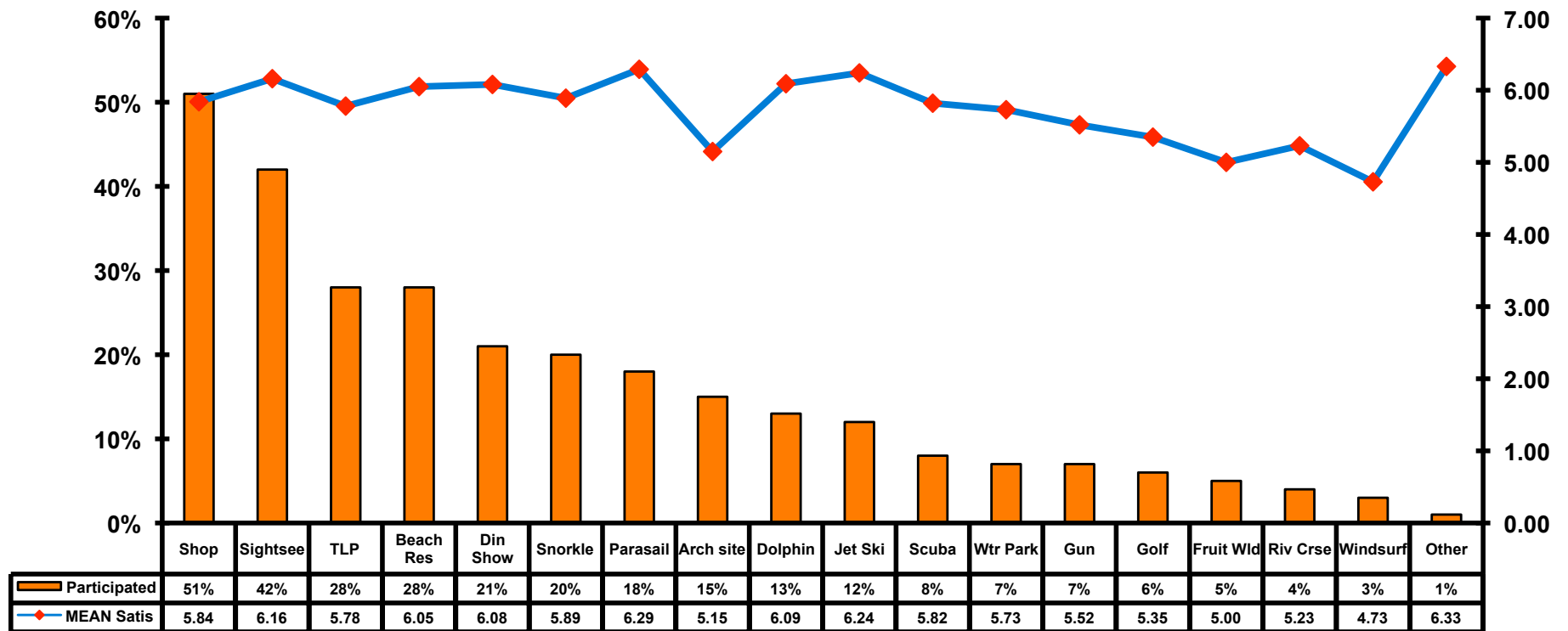
Night Tours Satisfaction

7pt Rating Scale

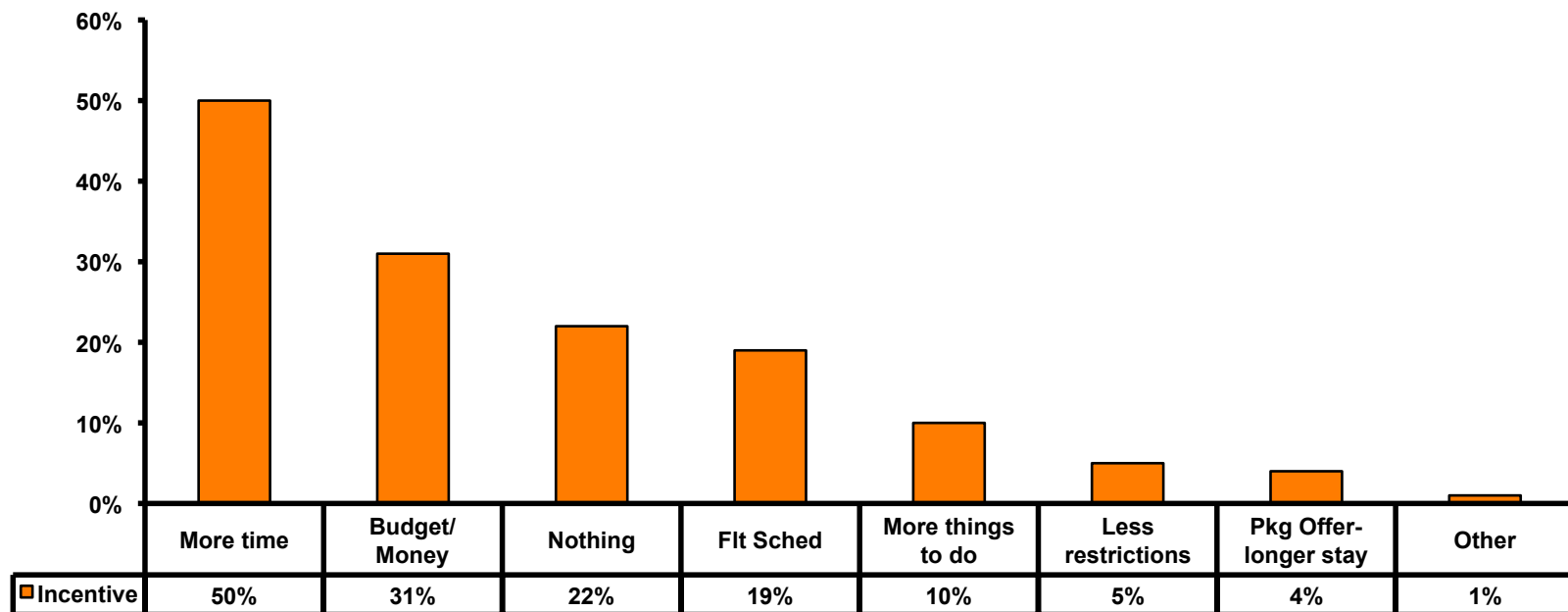
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 30%	Score of 6 to 7 = 30%
Score of 4 to 5 = 68%	Score of 4 to 5 = 68%
Score 1 to 3 = 3%	Score 1 to 3 = 2%
MEAN = 4.83	MEAN = 4.88

Satisfaction with Other Activities



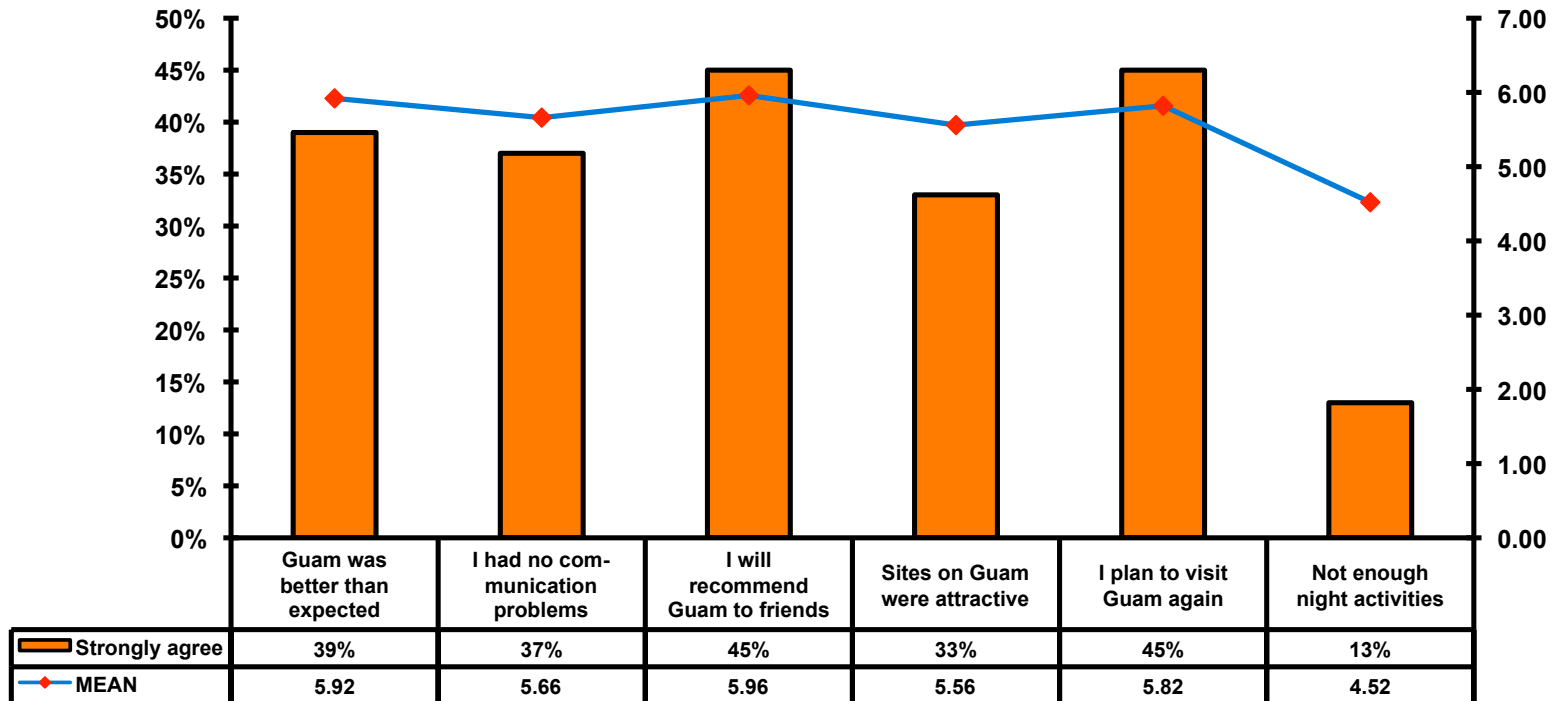
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

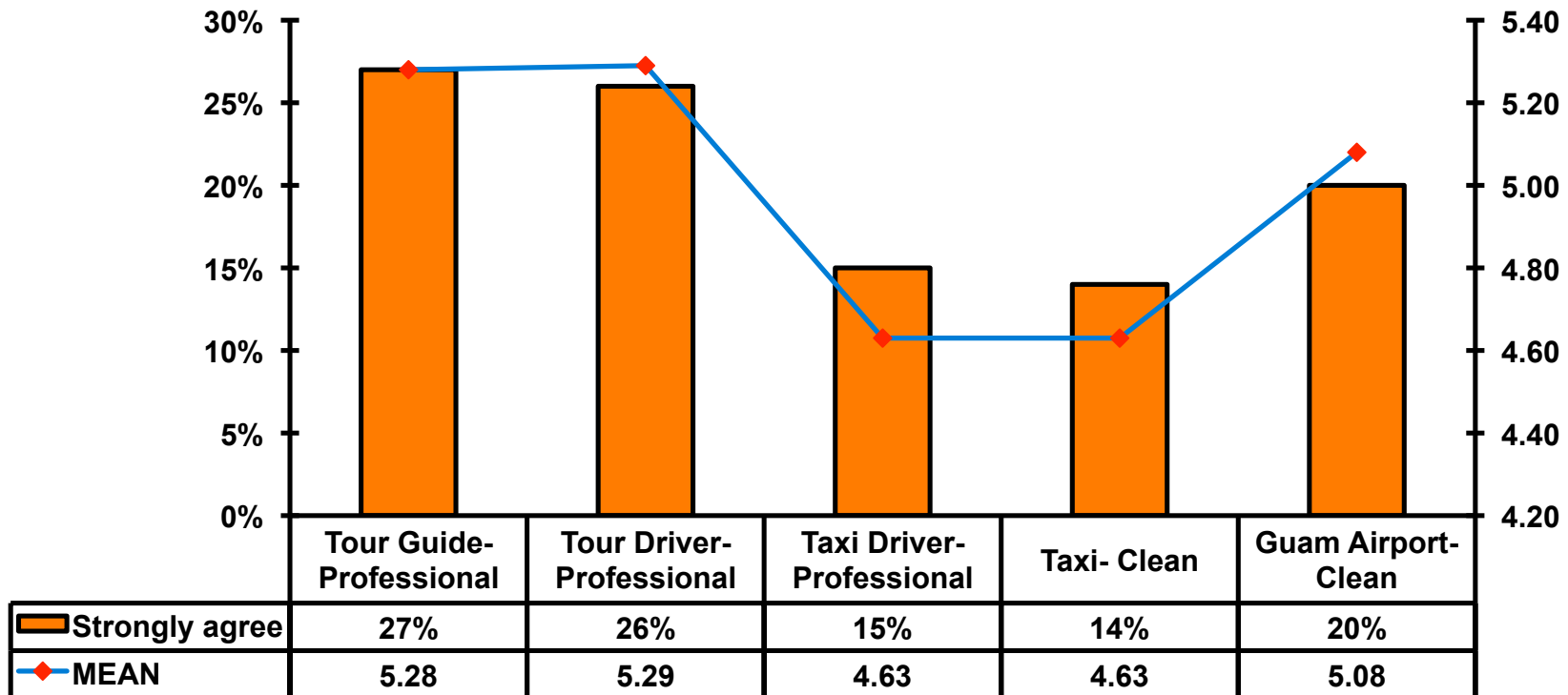
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

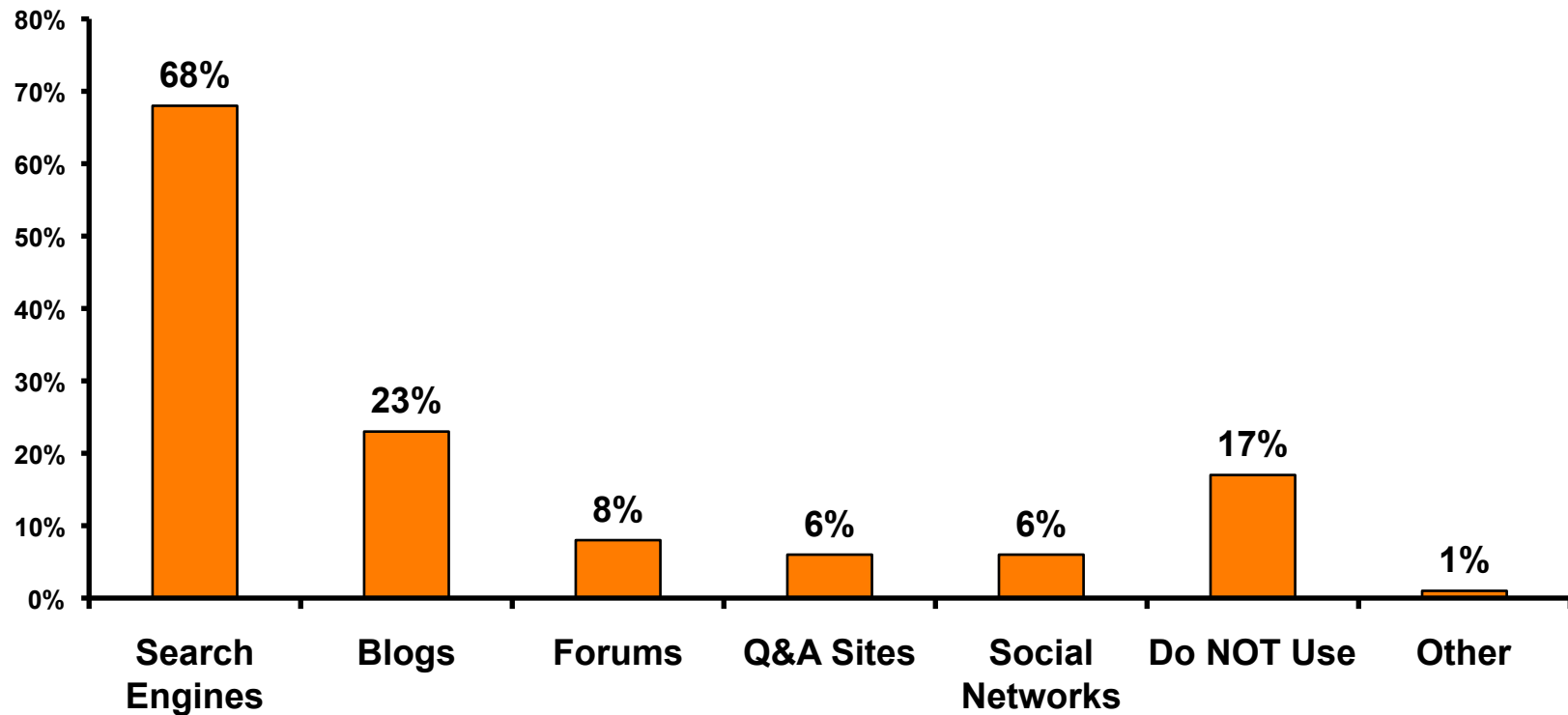
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



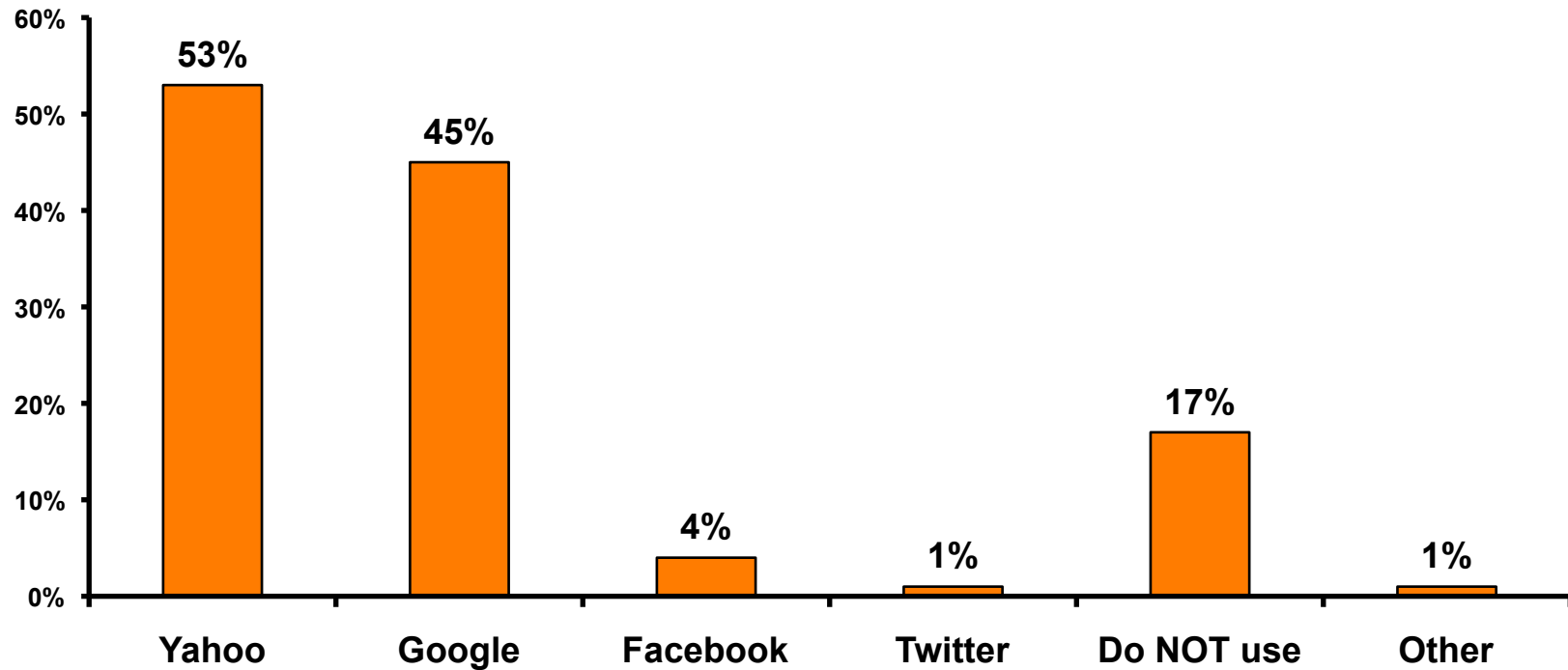
SECTION 5 **PROMOTIONS**

Internet: Guam Sources of Info

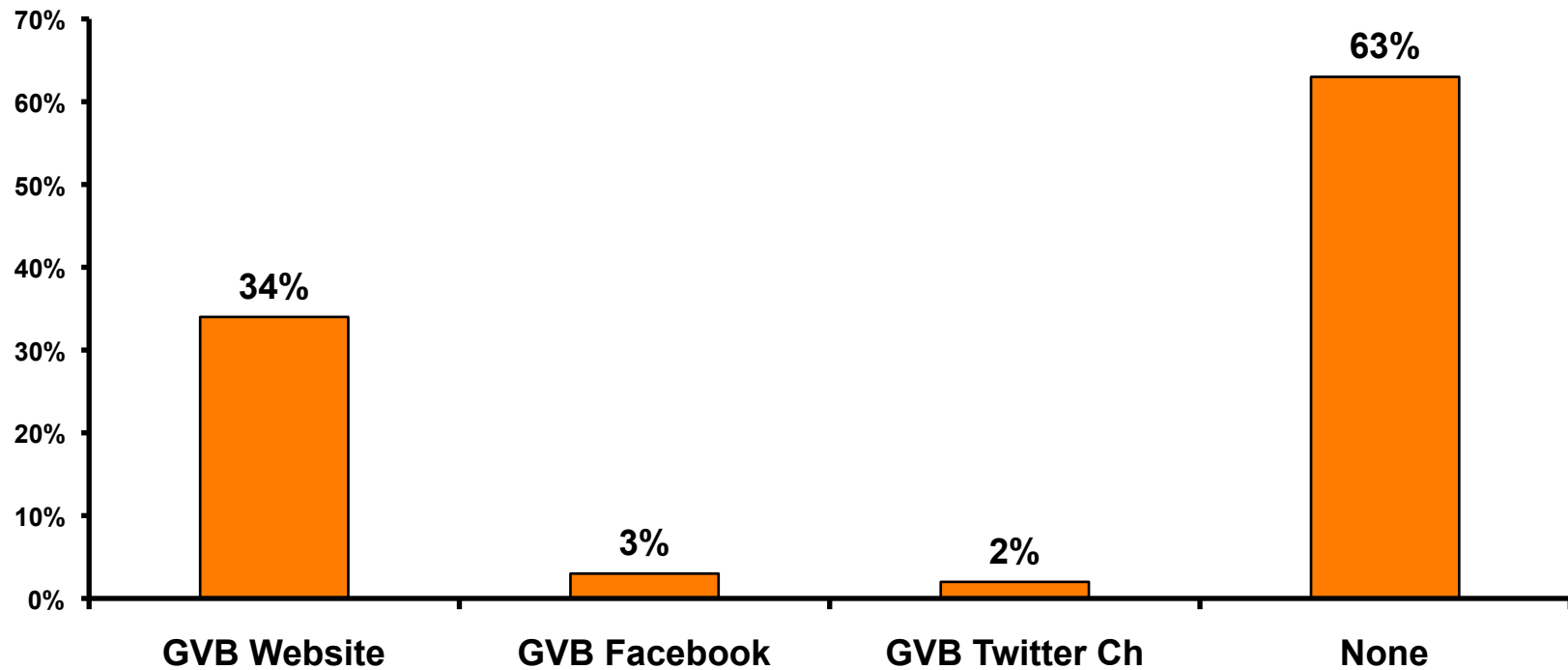


Internet: Things To Do

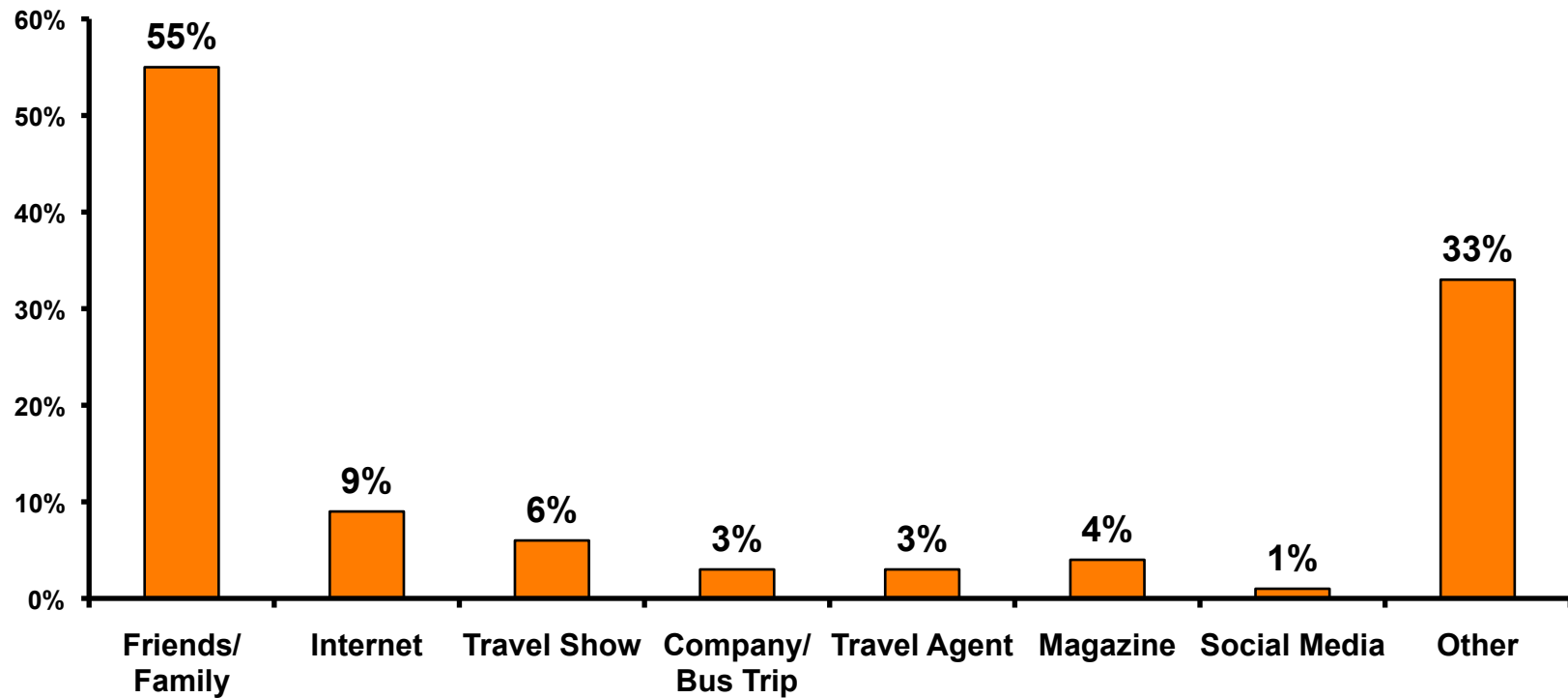
Sources of Info



Internet: GVB Sources

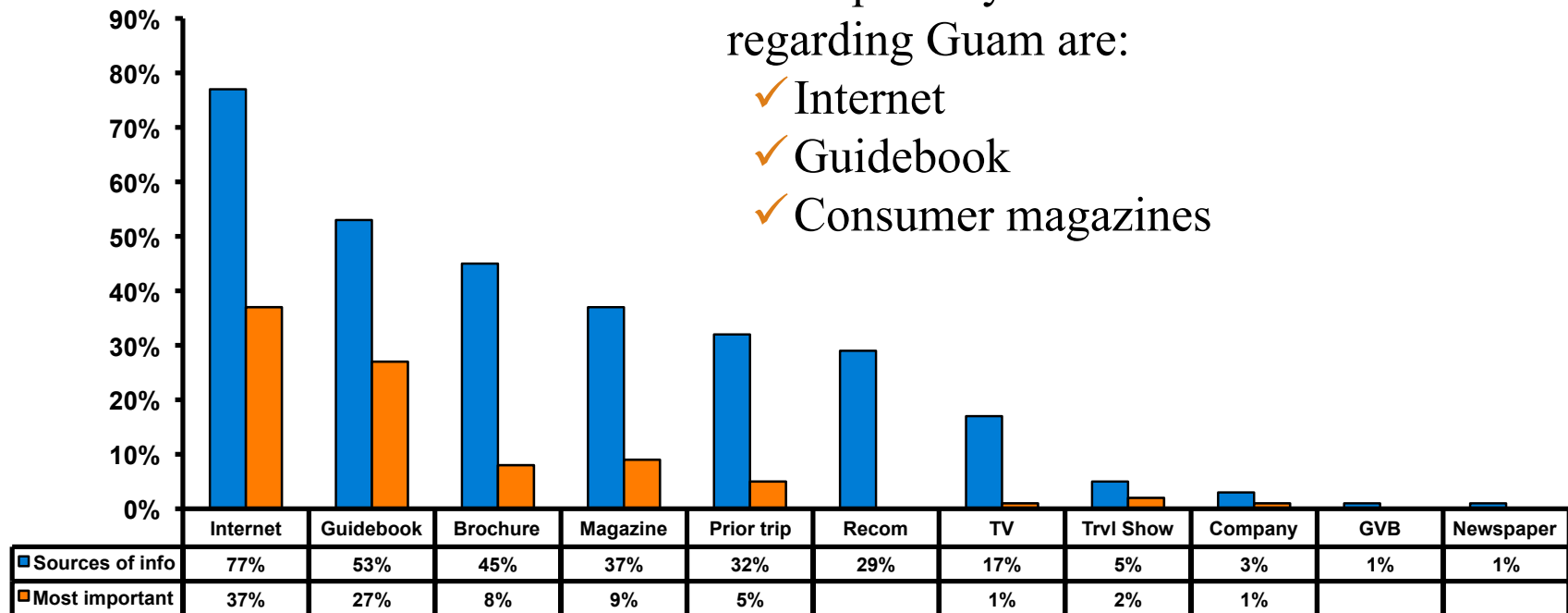


Travel Motivation: Info Sources



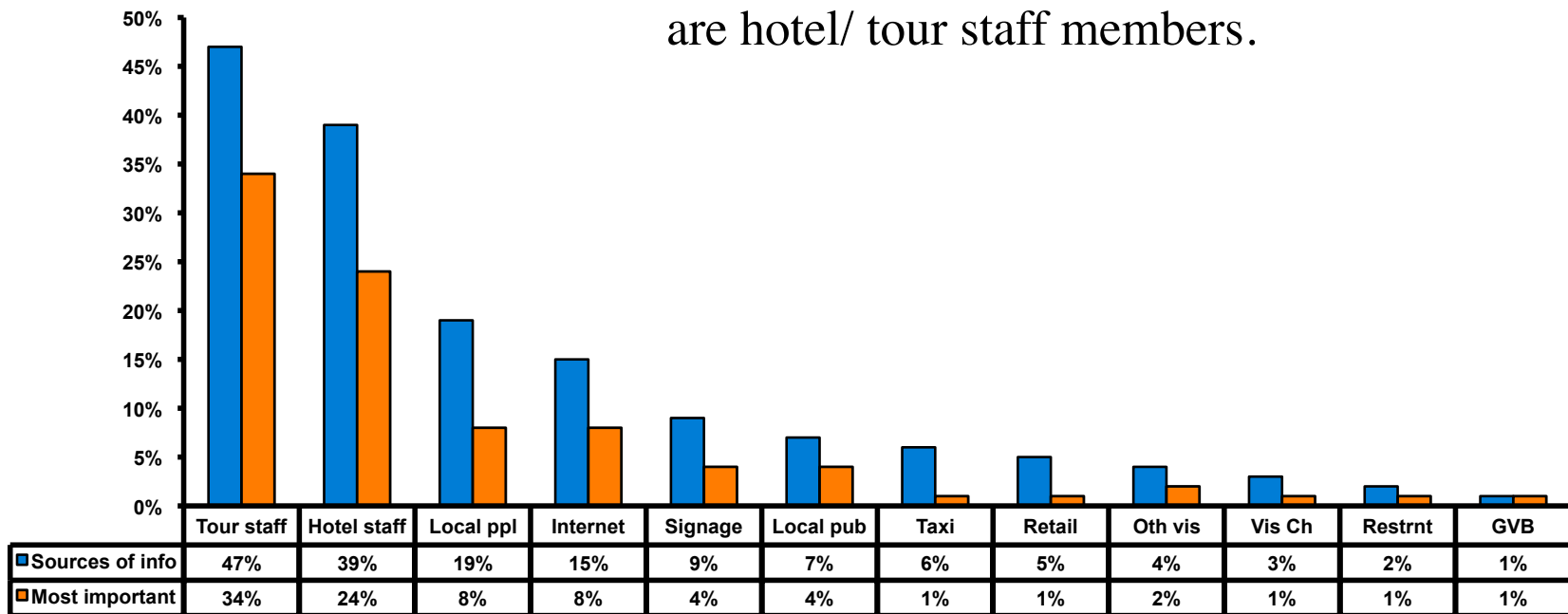
Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
 - ✓ Internet
 - ✓ Guidebook
 - ✓ Consumer magazines



Sources of Information Post-arrival

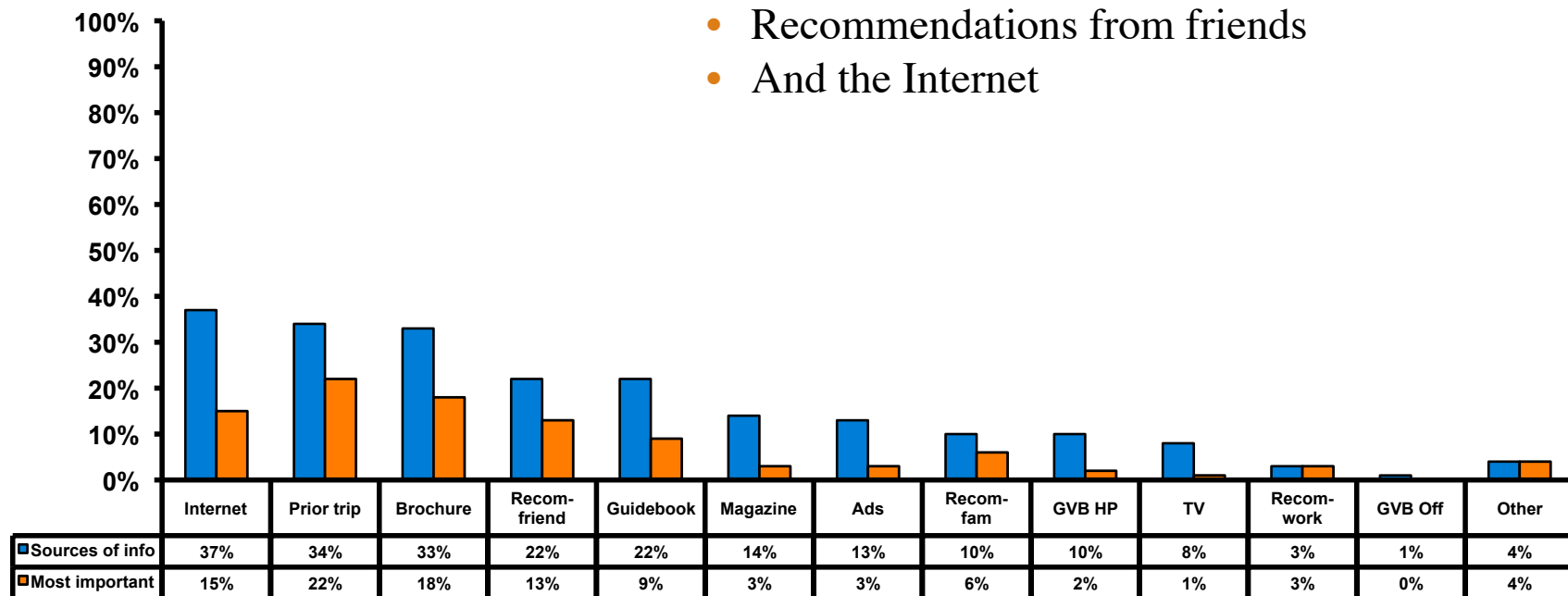
- The primary local source of information are hotel/ tour staff members.



Sources of Information - Motivation

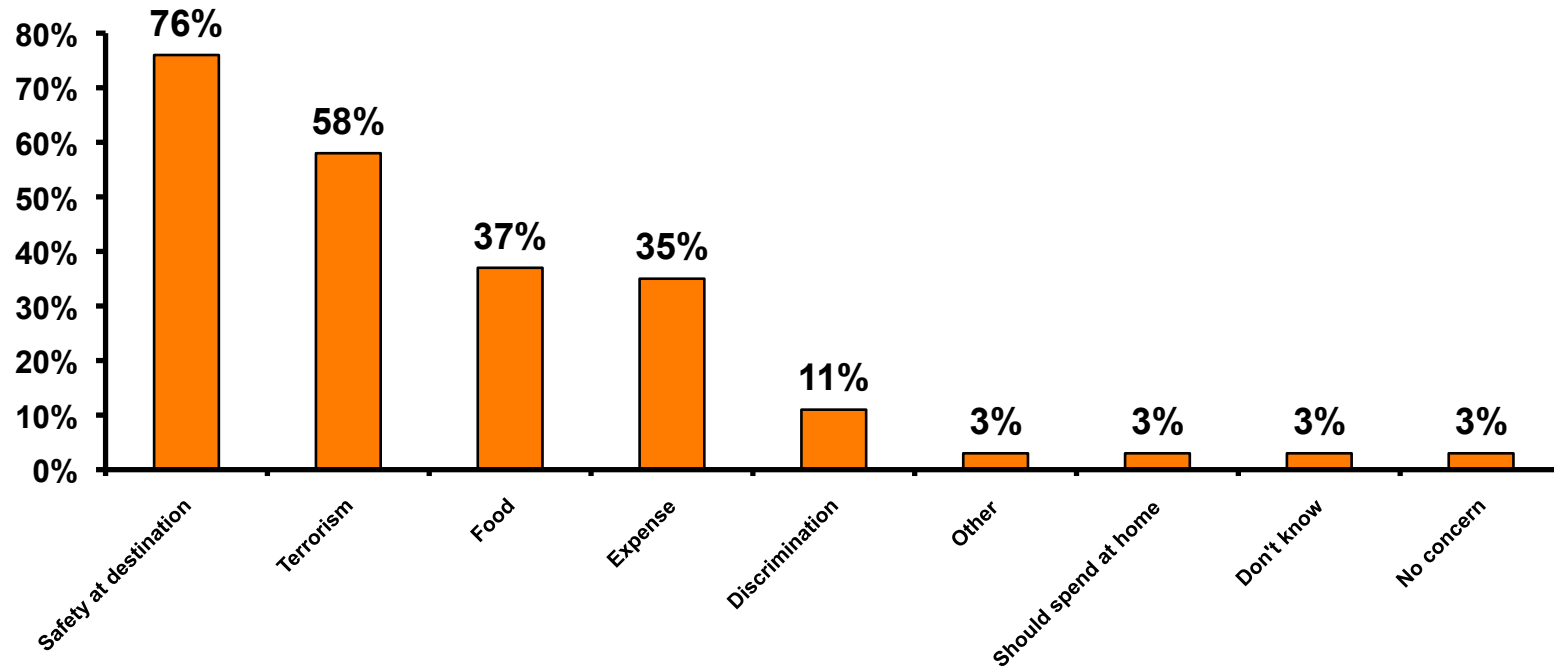
The primary motivational sources of information were.

- Brochures,
- Recommendations from friends
- And the Internet



SECTION 6 **OTHER ISSUES**

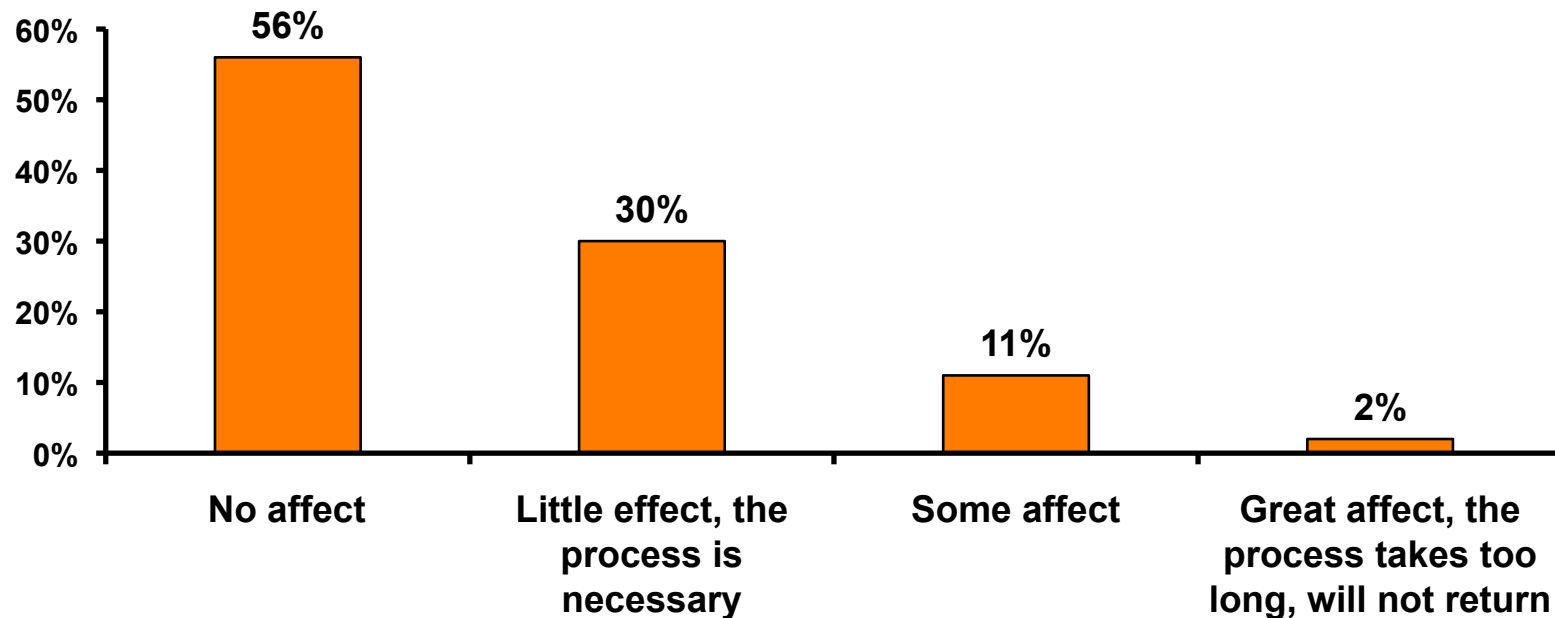
Concerns about travel outside of Japan - Overall



Concerns about travel outside of Japan - By Age & Income

		TOTAL	AGE				Q26								
		-	18-24	25-34	35-49	50+	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q21	Safety	76%	73%	75%	81%	78%	62%	67%	78%	77%	84%	76%	82%	50%	
	Terrorism	58%	55%	62%	53%	63%	57%	61%	63%	67%	58%	55%	68%	50%	
	Food	37%	40%	36%	36%	35%	43%	39%	39%	26%	44%	35%	30%		
	Expense	35%	36%	37%	36%	25%	57%	39%	37%	38%	44%	22%	28%		
	Discrimination against Japanese	11%	17%	10%	8%	10%	14%	8%	9%	10%	13%	8%	14%		
	Other	3%	5%	3%	1%	8%	10%		4%		5%		6%	50%	
	Don't know	3%	3%	4%	3%	3%		3%		3%		8%			
	Should spend at home	3%	5%	2%	3%		14%		4%	5%	2%		4%		
	No concerns	3%	4%	2%	3%			3%	2%	5%	2%	2%	2%		
	Total	Count	350	77	133	96	40	21	36	54	39	64	51	50	2

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

