



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013

AUGUST 2013



Prepared by: QMark Research

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Background & Methodology

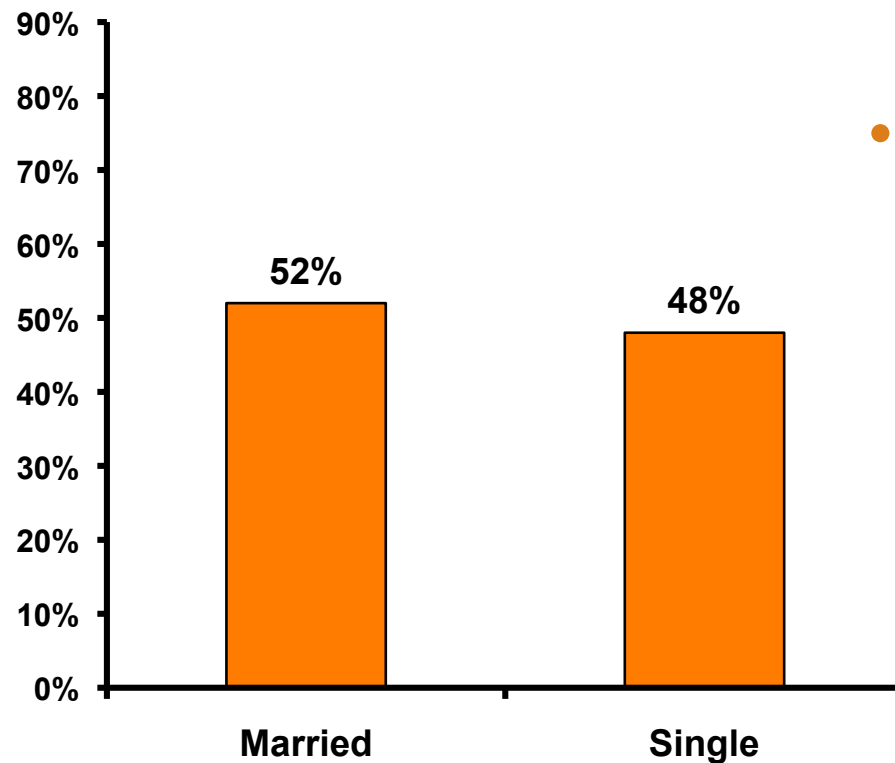
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **350** departing 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 **350** 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.

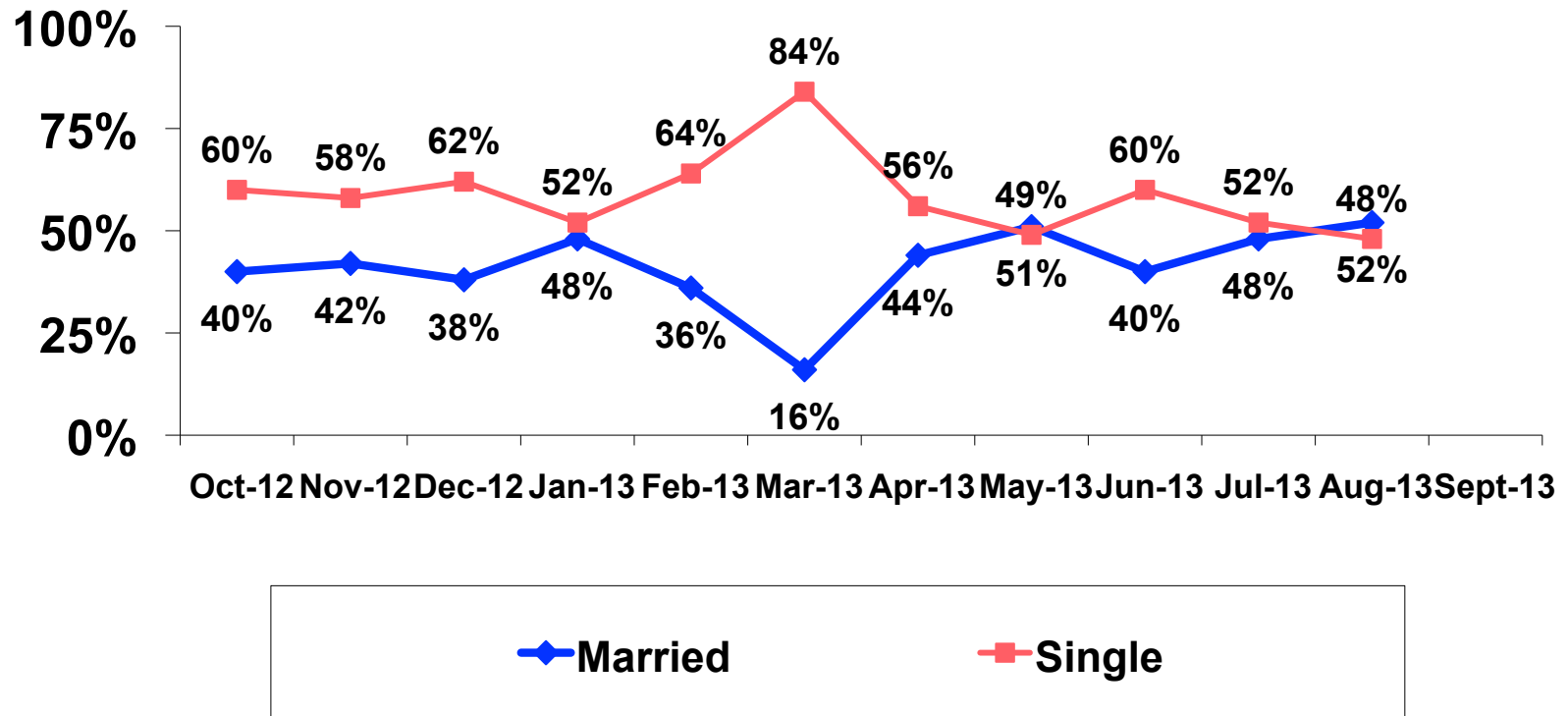
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

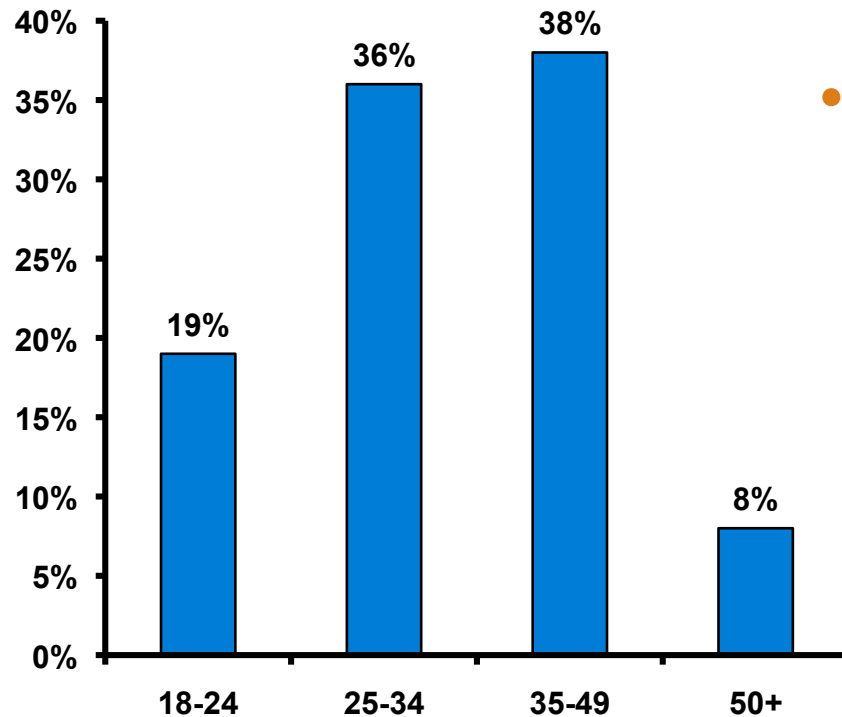


- 69% of repeat visitors are married.

Marital Status

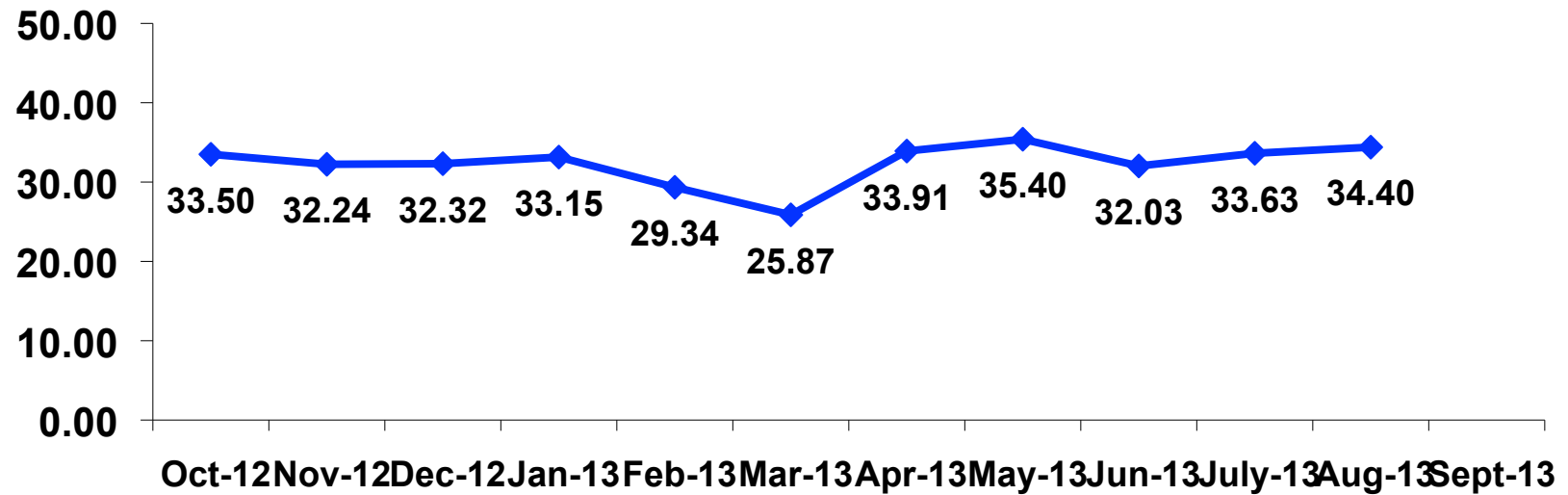


Age - Overall

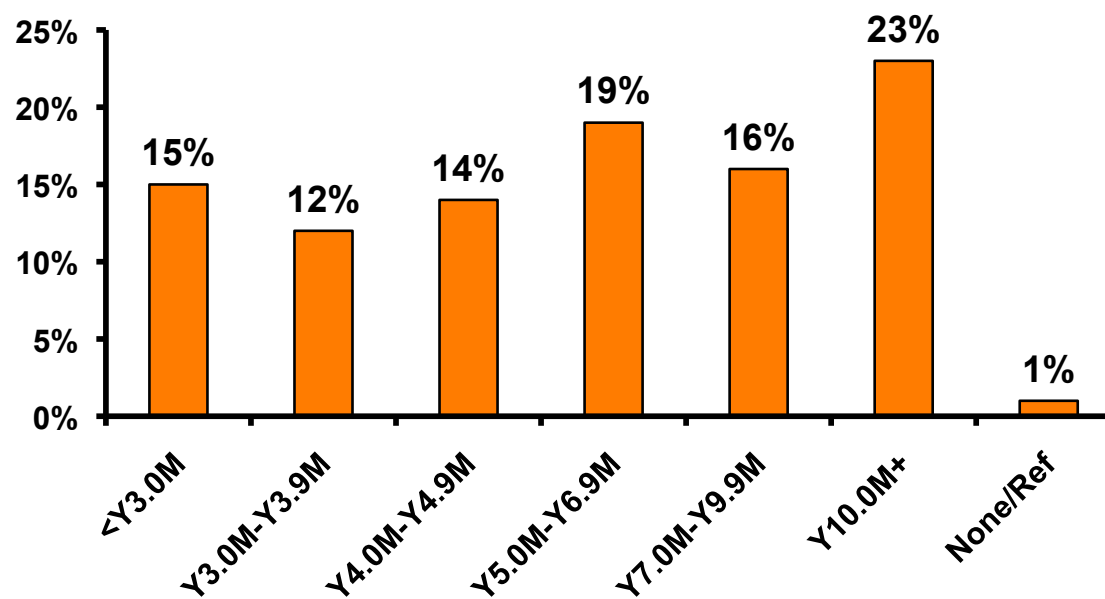


- The average age of the respondents is 34.40 years of age.

Average Age

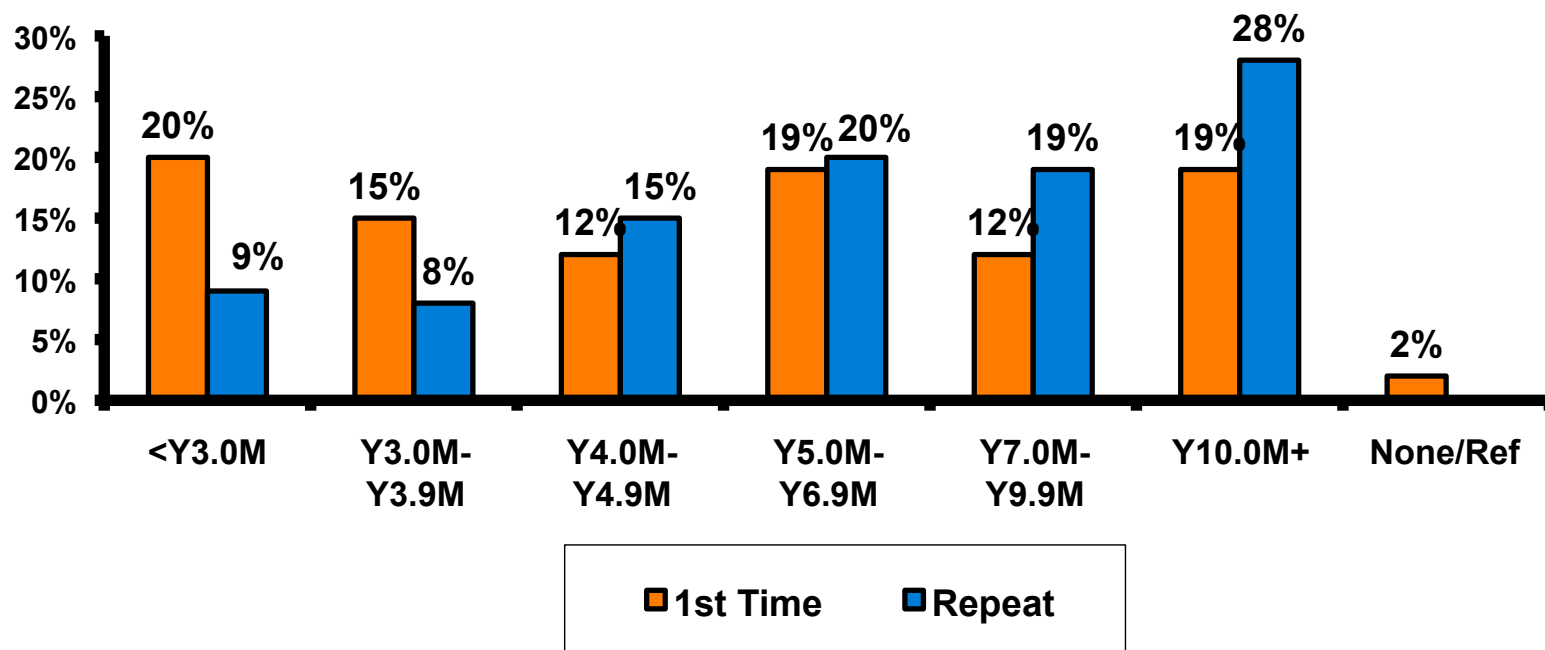


Personal Income



• ¥97.62=\$1

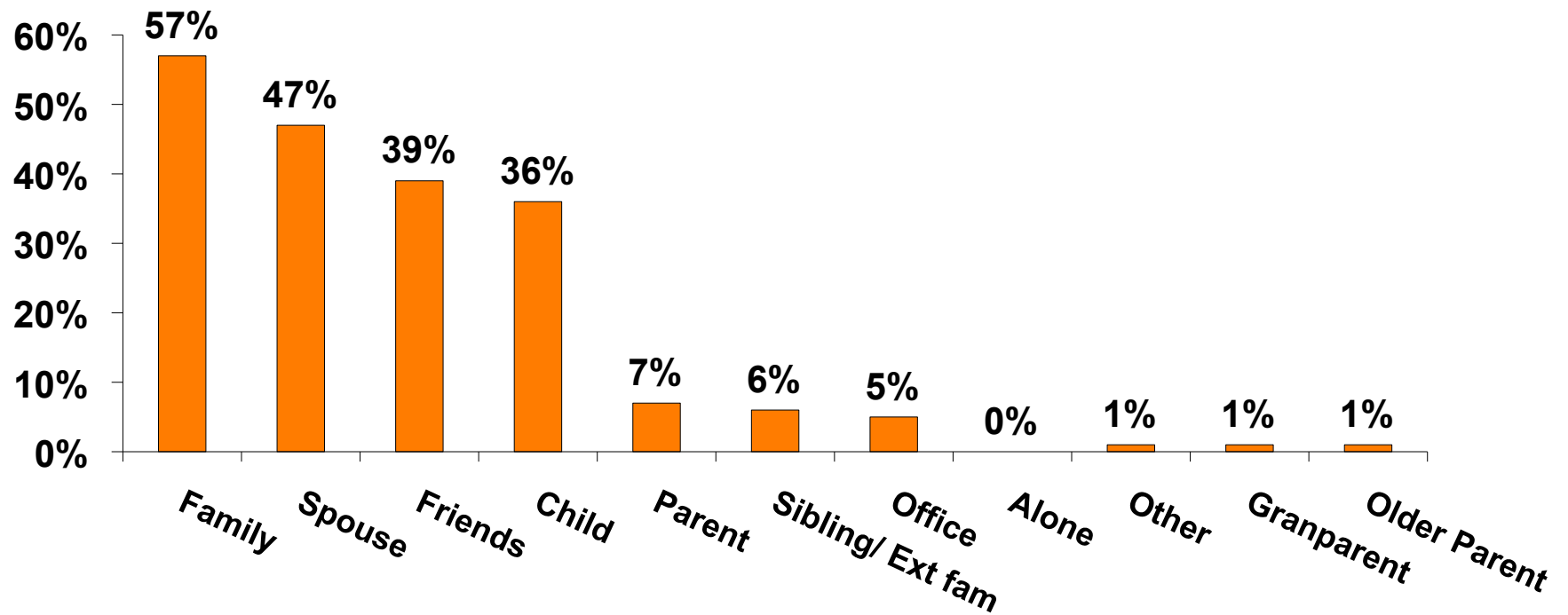
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	7	1	6	5	1	1	
		Column N %	2%	1%	4%	10%	1%	1%	
	Y2.0M-Y3.0M	Count	40	16	24	13	24	2	1
		Column N %	13%	10%	17%	25%	22%	2%	4%
	Y3.0M-Y4.0M	Count	36	12	24	6	22	7	1
		Column N %	12%	7%	17%	12%	20%	6%	4%
	Y4.0M-Y5.0M	Count	42	17	25	9	19	11	3
		Column N %	14%	10%	18%	17%	18%	9%	12%
	Y5.0M-Y7.0M	Count	60	43	17	3	21	32	4
		Column N %	19%	26%	12%	6%	19%	26%	16%
	Y7.0M-Y10.0M	Count	48	29	19	6	7	31	4
		Column N %	16%	17%	13%	12%	6%	25%	16%
	Y10.0M+	Count	72	47	25	8	13	38	12
		Column N %	23%	28%	18%	15%	12%	31%	48%
	No Income	Count	3	1	2	2	1		
		Column N %	1%	1%	1%	4%	1%		
	Total	Count	308	166	142	52	108	122	25

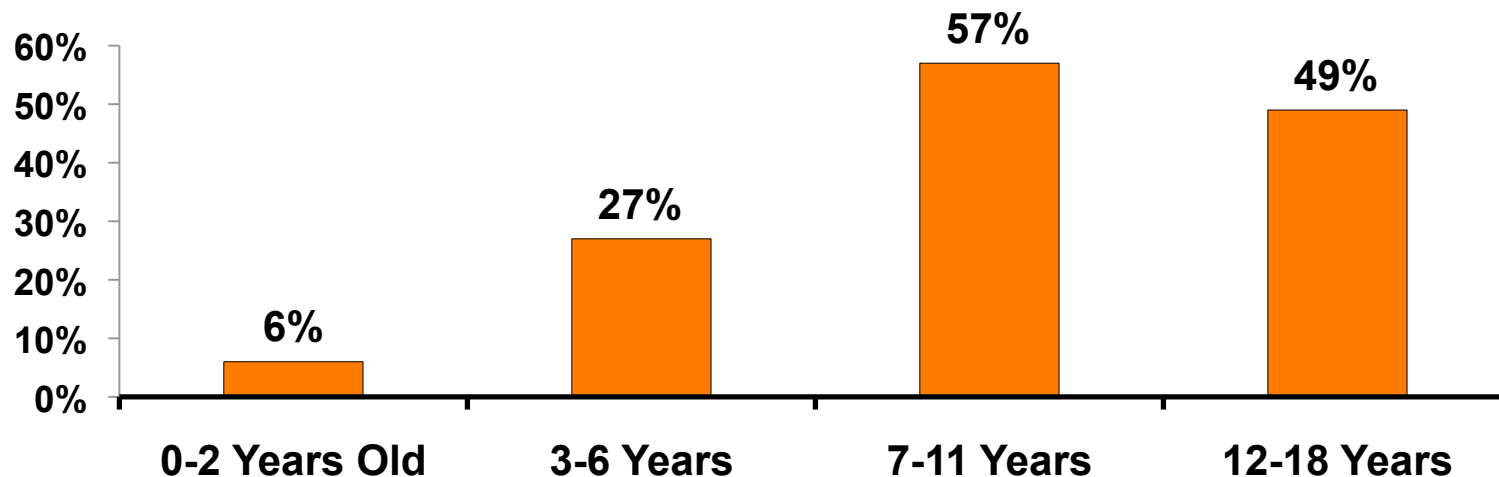
Travel Companions



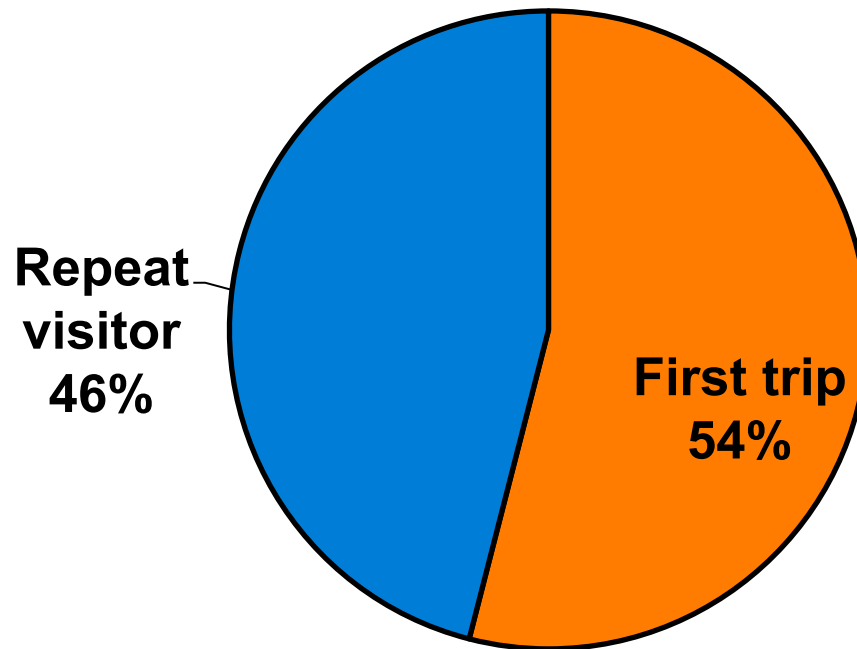
Number of Children Travel Party

N=122 total respondents traveling with children.

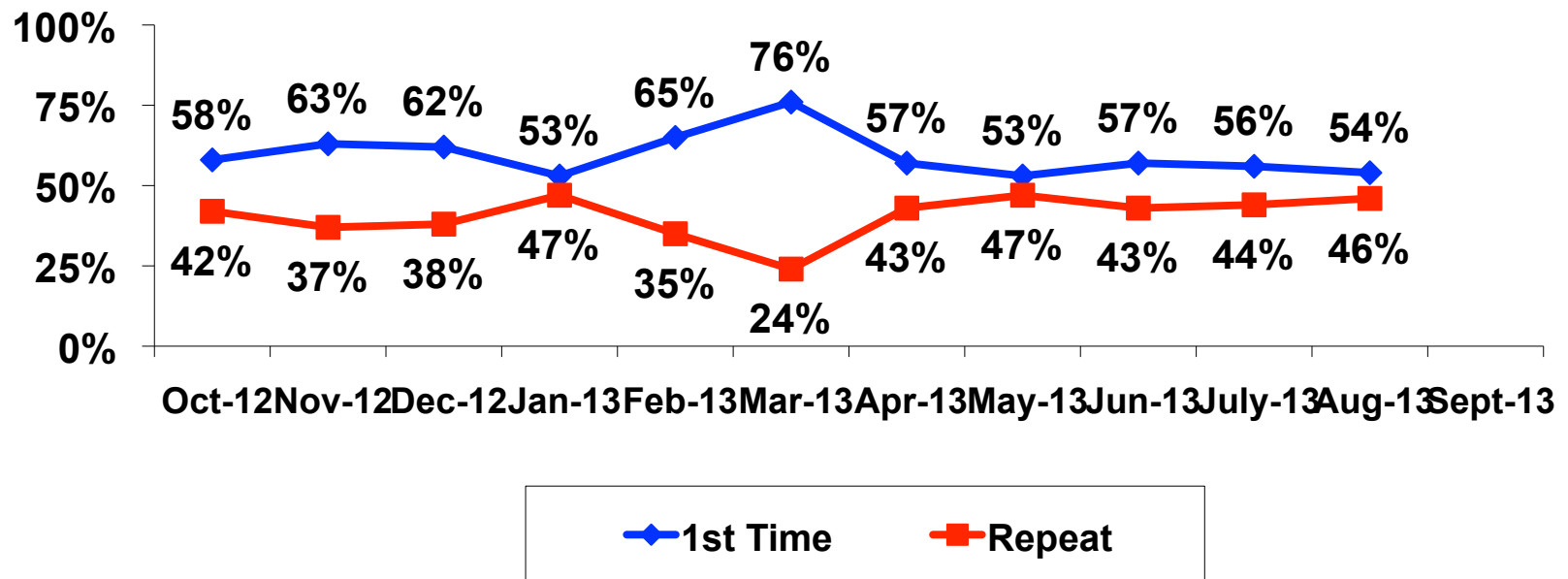
(Of those N=122 respondents, there is a total of 211 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



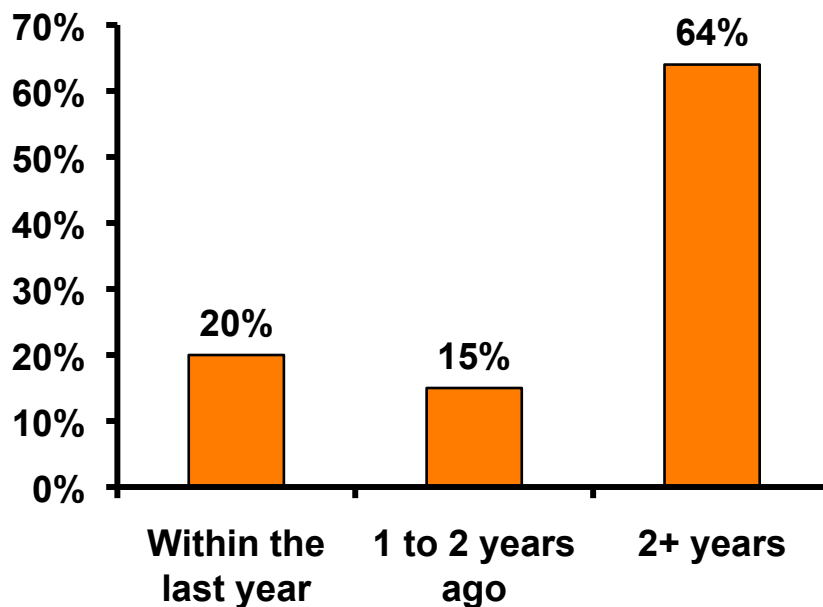
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	177	84	92
		Column N %	51%	44%	58%
	Female	Count	173	105	68
		Column N %	49%	56%	43%
	Total	Count	350	189	160
AGE	18-24	Count	65	55	10
		Column N %	19%	29%	6%
	25-34	Count	124	78	46
		Column N %	36%	41%	29%
	35-49	Count	132	40	91
		Column N %	38%	21%	57%
	50+	Count	28	16	12
		Column N %	8%	8%	8%
	Total	Count	349	189	159

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

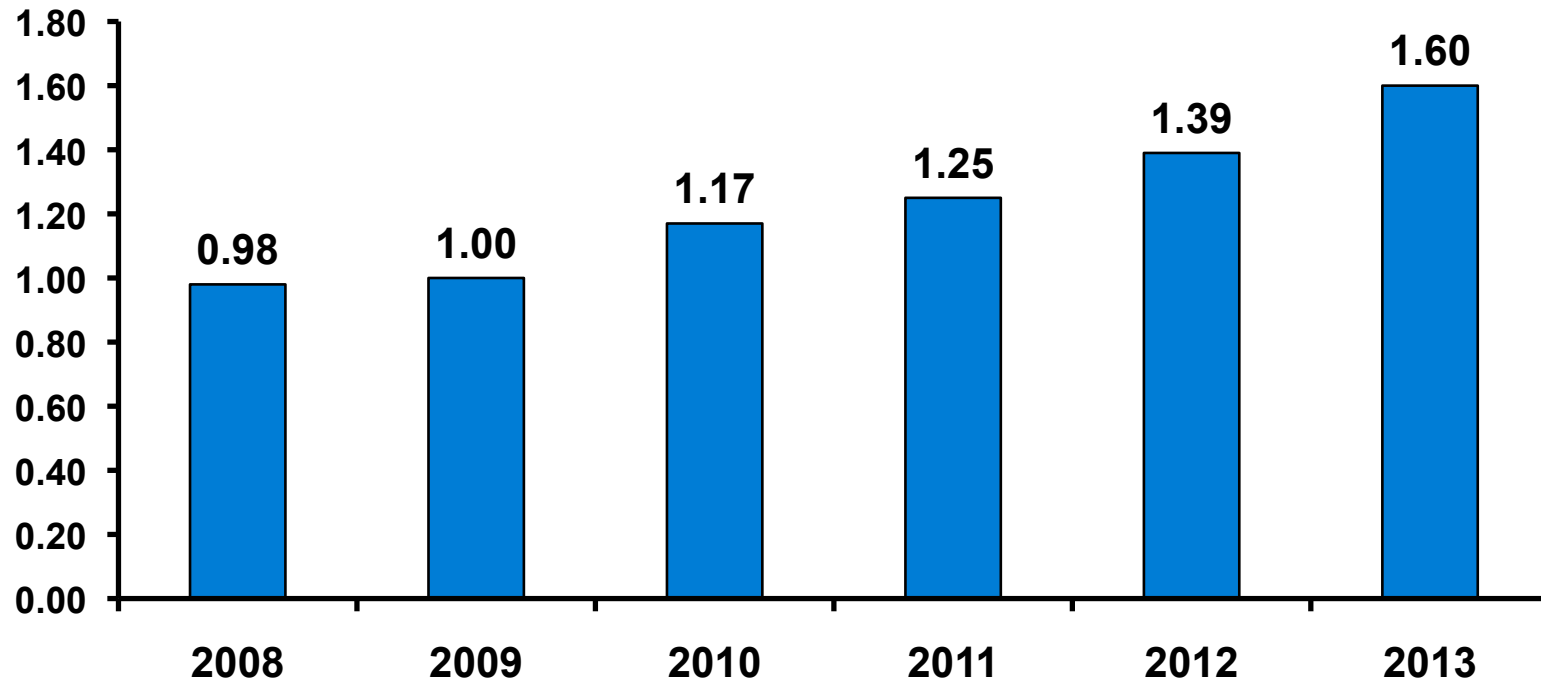
Repeat Visitors Last Trip

n = 157



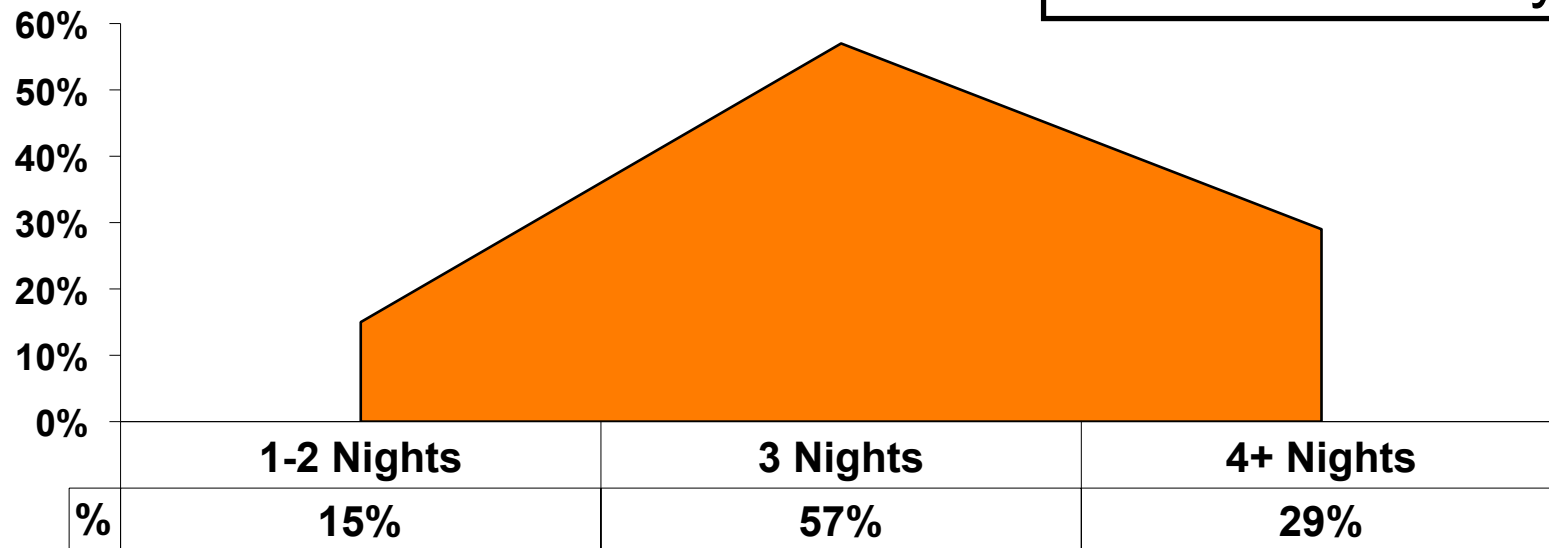
- The average repeat visitor has been to Guam 2.94 times.
- Less than half the repeat visitors have been to Guam within the last 2 years.

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

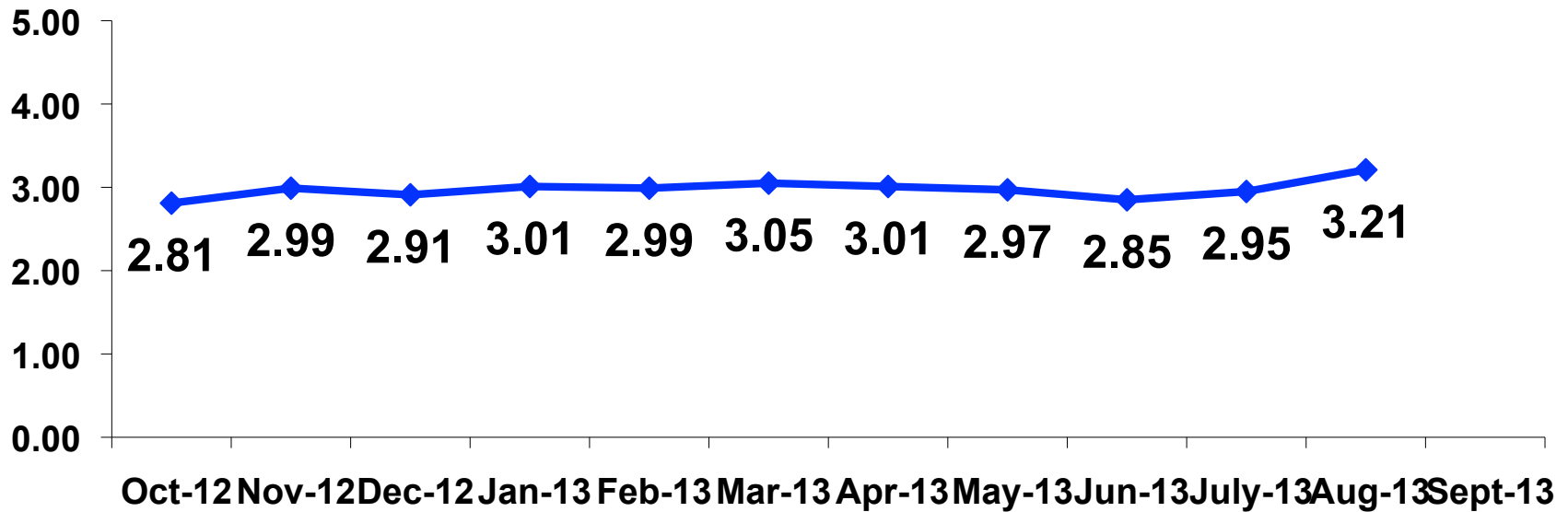


Length of Stay

Mean = 3.21 Days
Median = 3.0 Days



Average Length of Stay

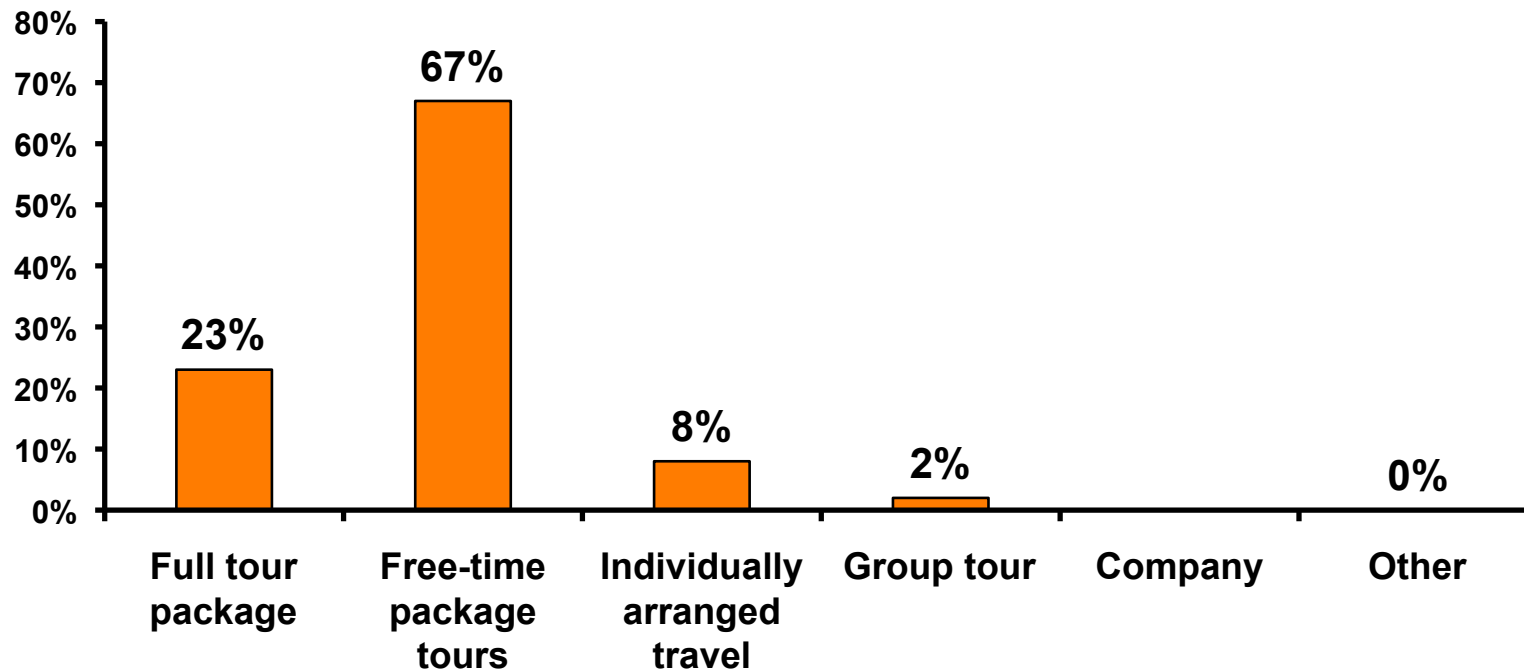


Occupation by Income

	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	
Q25 Office worker non-mgr	17%		23%	28%	21%	20%	17%	8%		
Salesperson	14%		8%	17%	14%	20%	17%	17%		
Teacher	12%	14%	23%	22%	19%	7%	8%	6%		
Engineer	11%		10%	14%	14%	18%	15%	7%		
Manager	7%				2%	5%	6%	21%		
Self-employed	7%		3%	3%	7%	8%	8%	13%		
Student	7%	29%	5%	3%	7%	2%	4%	3%	67%	
Homemaker	6%		3%	3%	2%	2%	6%	13%		
Professional/ Specialist	4%	14%		3%	7%	5%	2%	6%		
Govt- office worker non-mgr	3%		10%	6%		3%	4%	1%		
Skilled worker	3%	43%	3%			5%	2%			
Executive (30+ employees)	2%		3%			2%	2%	4%		
Other	2%		3%	3%		3%	2%			
Unemployed	1%		5%						33%	
Freeter	1%		3%		2%					
Govt- Manager	1%				2%		4%			
Free-lancer	1%		3%					1%		
Govt- Executive	0%						2%			
Total	Count	338	7	40	36	42	60	48	71	3

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

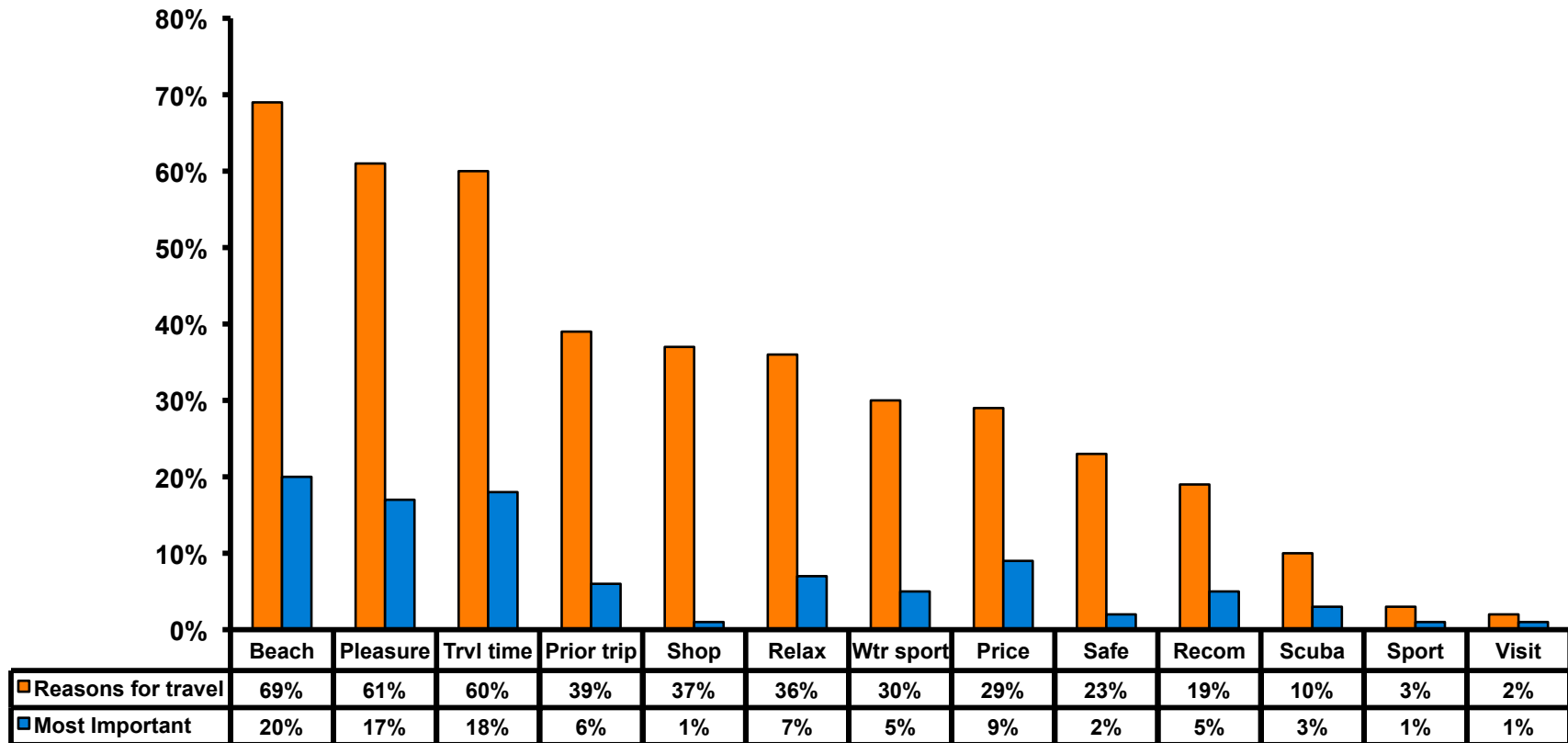


Accommodation by Income

Average length of stay: 3.21 days

		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+		
Q9	Guam Plaza Hotel	19%	29%	23%	36%	29%	15%	6%	14%		
	Guam Reef & Olive Spa	11%		8%	11%	14%	17%	13%	6%		
	Hotel Nikko Guam	7%				14%	10%	13%	7%		
	Grand Plaza Hotel	6%		3%	6%	7%	5%	6%	6%	33%	
	Holiday Resort Guam	6%		20%	6%	2%	7%	6%	3%		
	Royal Orchid Guam	5%		15%	6%	2%	2%	8%	3%	33%	
	Hilton Guam Resort	5%	14%				3%	2%	11%		
	PIC Club	4%		3%			5%	4%	10%		
	Pacific Bay Hotel	4%	14%	10%	3%	2%	7%	4%			
	Hyatt Regency Guam	4%			8%	2%	2%		7%		
	Leo Palace Resort	4%	14%	5%	6%	2%	7%	2%	1%	33%	
	Outrigger Guam Resort	4%			3%	5%	5%	10%	1%		
	Onward Beach Resort	3%					3%	10%	6%		
	Oceanview Hotel	3%	14%	3%	3%	5%		6%	4%		
	Sheraton Laguna Guam	3%	14%	3%	3%		3%		4%		
	Westin Resort Guam	3%			8%	5%	3%	2%	3%		
	Fiesta Resort Guam	3%		5%		7%		2%	3%		
	Other	2%		3%			2%		4%		
	Guam Marriott Resort	1%				2%	2%	2%	3%		
	Condo	1%		3%			2%		3%		
	Ramada Suites Guam	1%			3%				3%		
	Bayview Hotel	1%					2%	2%			
	Total	Count	349	7	40	36	42	60	48	72	3

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

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

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	69%	72%	69%	70%	63%	72%	67%	
	Pleasure	61%	70%	56%	66%	44%	64%	58%	
	Short travel time	60%	52%	51%	75%	41%	64%	55%	
	Previous trip	39%	11%	31%	63%	30%	45%	34%	
	Shopping	37%	45%	44%	26%	48%	32%	43%	
	Relax	36%	45%	36%	31%	37%	38%	34%	
	Water sports	30%	42%	28%	29%	19%	27%	34%	
	Price	29%	33%	27%	30%	26%	28%	30%	
	Safe	23%	16%	19%	31%	19%	26%	20%	
	Recomm- friend/family/trvl agnt	19%	39%	21%	8%	19%	14%	24%	
	Scuba	10%	13%	13%	5%	7%	9%	10%	
	Organized sports	3%	3%	2%	2%	4%	3%	2%	
	Visit friends/ Relatives	2%	2%	3%	2%		3%	2%	
	Other	2%		2%	2%	4%	2%	2%	
	Married/ Attn wedding	2%	2%	2%		7%	1%	2%	
	Company/ Business Trip	2%	3%	1%	2%		1%	2%	
	Golf	2%		2%	3%		3%	1%	
	Honeymoon	1%		3%			1%	1%	
	Company Sponsored	1%	2%	1%	1%			2%	
	Career Cert/ Testing	0%		1%				1%	
	Total	Count	347	64	123	132	27	176	171

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	69%	86%	65%	56%	76%	70%	67%	72%	100%	
	Pleasure	61%	86%	55%	42%	49%	68%	65%	68%	100%	
	Short travel time	60%	43%	43%	39%	56%	67%	71%	64%	67%	
	Previous trip	39%	29%	25%	25%	51%	38%	54%	53%		
	Shopping	37%	14%	45%	28%	46%	32%	35%	36%	100%	
	Relax	36%	29%	30%	31%	39%	27%	31%	50%	33%	
	Water sports	30%	14%	43%	19%	24%	27%	40%	25%	33%	
	Price	29%	14%	33%	8%	29%	32%	25%	38%	100%	
	Safe	23%	14%	15%	22%	29%	23%	29%	21%	33%	
	Recomm- friend/family/trvl agnt	19%	29%	28%	28%	15%	15%	17%	14%		
	Scuba	10%		23%	11%	5%	8%	6%	6%		
	Organized sports	3%	14%	3%	3%	5%	2%		3%		
	Visit friends/ Relatives	2%		3%	6%		3%		1%		
	Other	2%			3%	7%	2%	4%			
	Married/ Attn wedding	2%				5%	2%	2%			
	Company/ Business Trip	2%	14%			2%	3%		1%		
	Golf	2%		3%			2%	2%	4%		
	Honeymoon	1%		3%		2%	2%				
	Company Sponsored	1%					2%		3%		
	Career Cert/ Testing	0%				2%					
	Total	Count	347	7	40	36	41	60	48	72	3

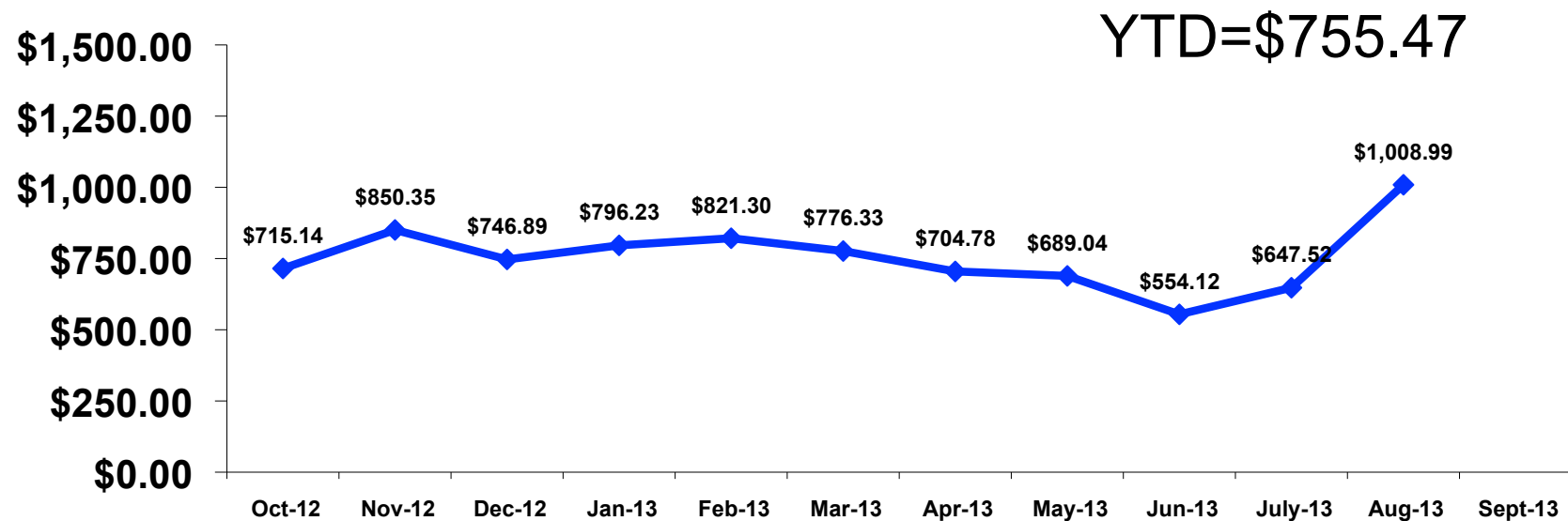
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥97.62/US\$1

- \$2,521.84 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$30,731 = maximum (highest amount recorded for the entire sample)
- \$1,008.99 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

¥97.62=\$1

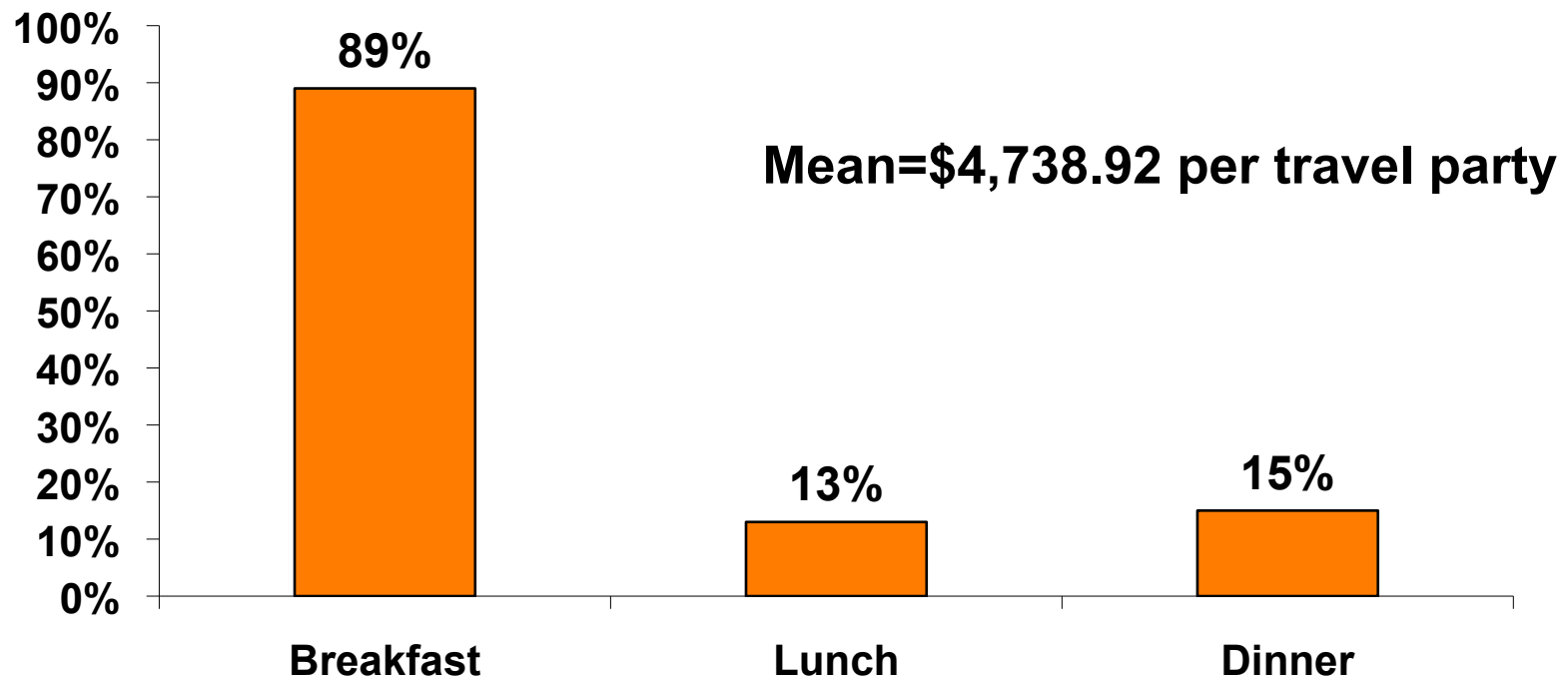
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$2,363.40
Air & Accommodation w/ daily meal package	\$4,738.92
Air only	\$2,328.42
Accommodation only	\$542.92
Accommodation w/ daily meal only	\$2,356.07
Food & Beverages in Hotel	\$-
Ground transportation - Japan	\$69.49
Ground transportation - Guam	\$156.22
Optional tours/ activities	\$329.94
Other expenses	\$102.78
Total Prepaid	\$2,521.84

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

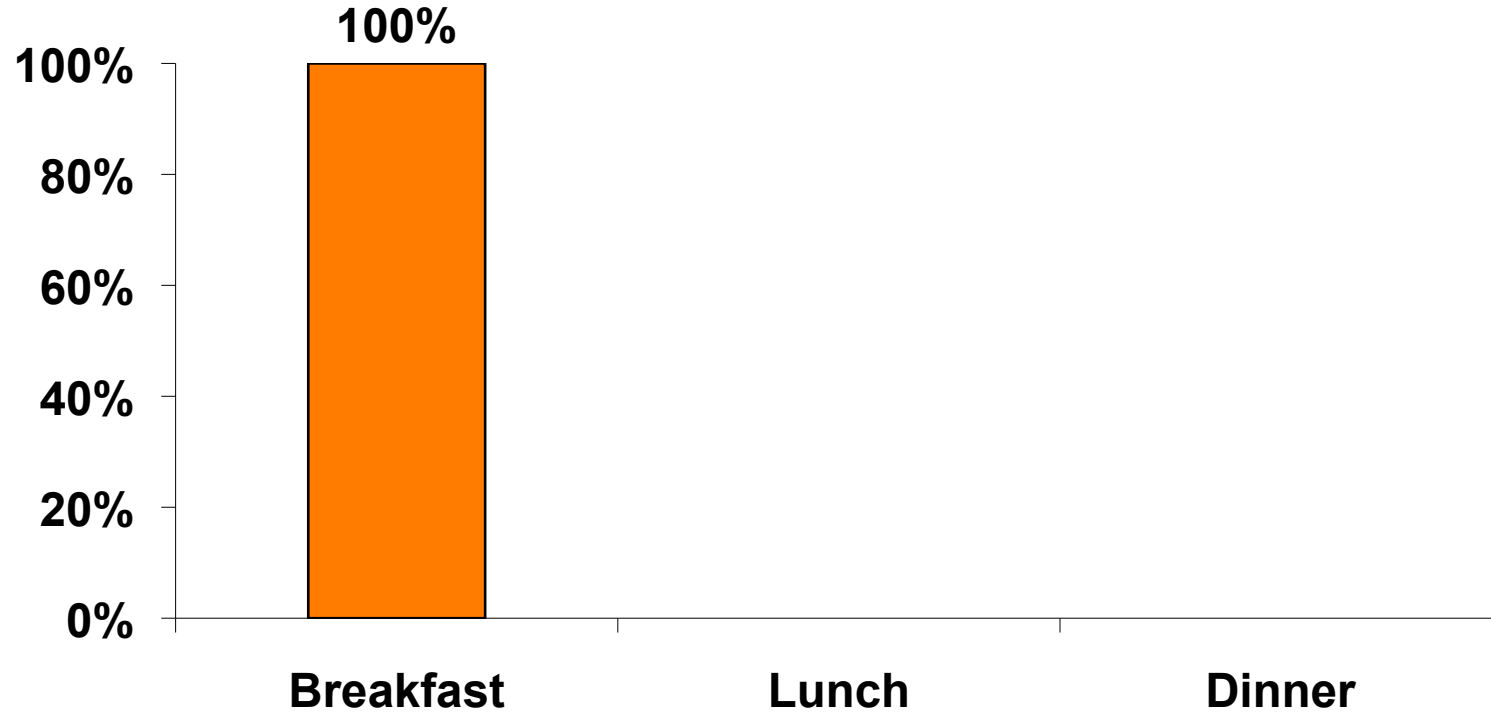
n=62



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

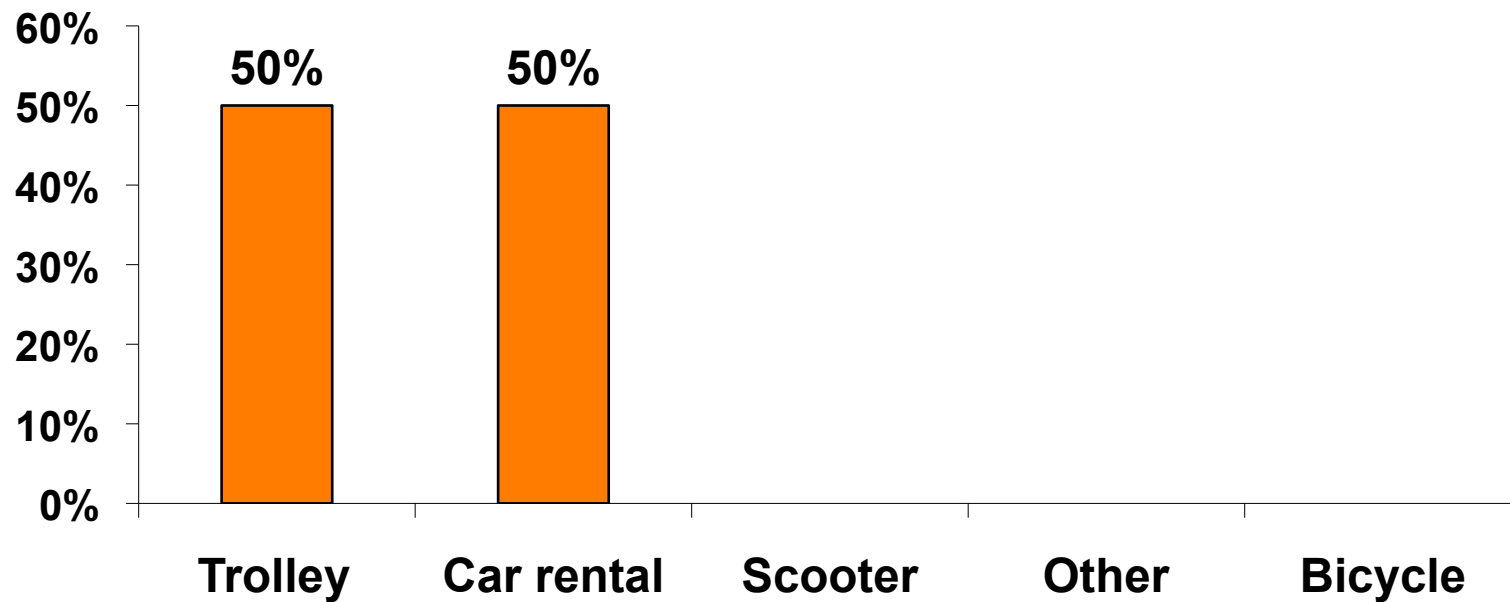
N=2



Mean=\$2,356.07 per travel party

Prepaid Ground Transportation

n=4

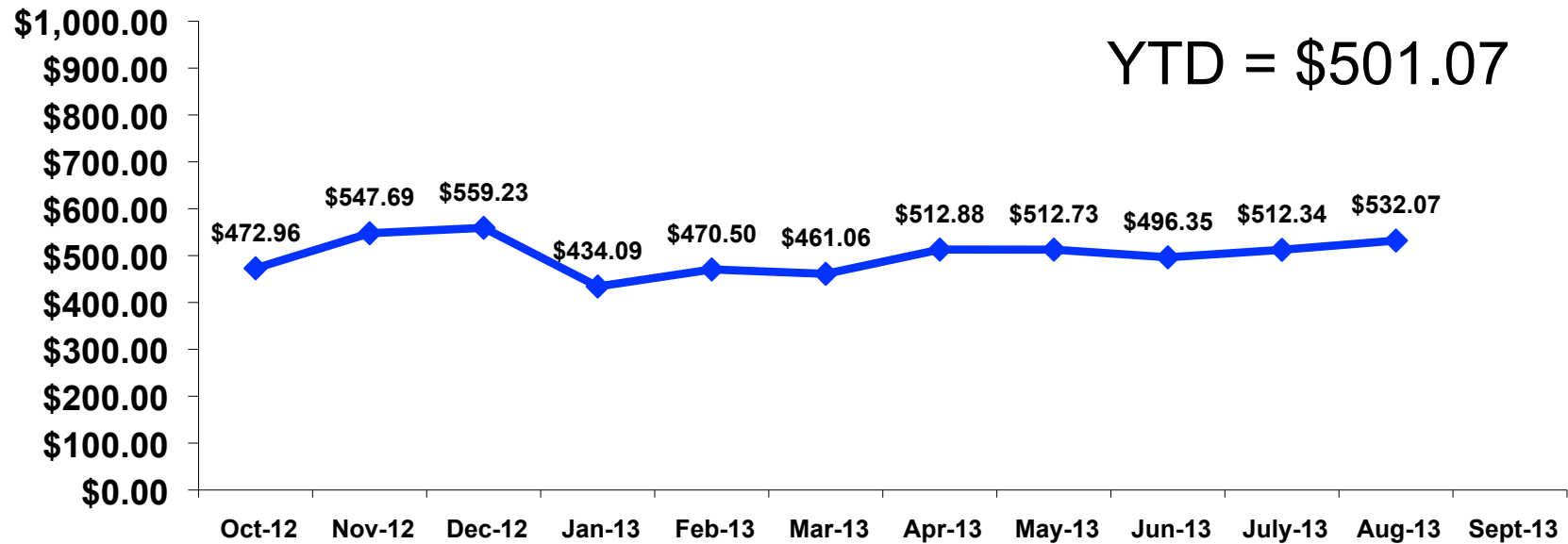


Mean=\$156.22 per travel party

On-Island Expenditures

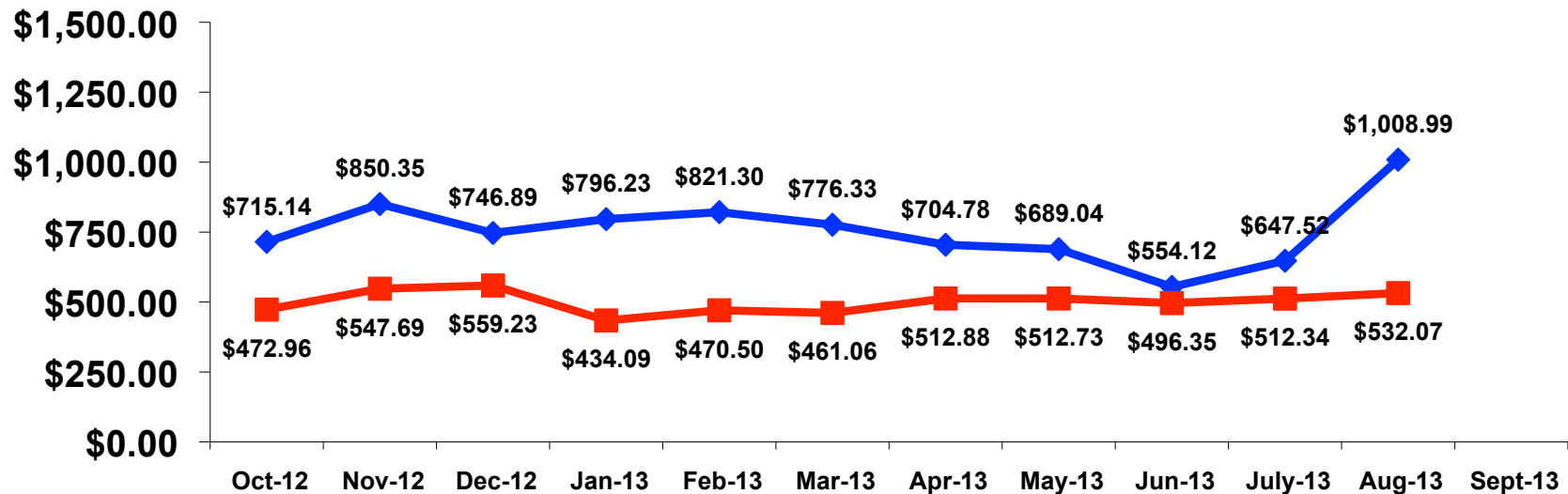
- \$981.73 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,000 = Maximum (highest amount recorded for the entire sample)
- \$532.07 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person



Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$755.47 On-Island YTD = \$501.07



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	\$532.07	\$496.06	\$568.91	\$730.00	\$662.15	\$357.90	\$444.37	\$531.65	\$655.99	\$421.86	\$921.42
	Median	\$375	\$333	\$400	\$500	\$514	\$275	\$388	\$465	\$400	\$325	\$500
	Minimum	\$0	\$0	\$0	\$75	\$0	\$0	\$125	\$0	\$0	\$0	\$48
	Maximum	\$5,000	\$4,000	\$5,000	\$1,665	\$4,000	\$2,000	\$1,690	\$3,982	\$5,000	\$3,333	\$2,500

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$57.44	\$73.19	\$41.32	\$18.42	\$42.69	\$69.17	\$160.14
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$17
F&B FF/STORE	Mean	\$41.24	\$50.33	\$31.94	\$35.77	\$35.10	\$52.58	\$29.14
	Median	\$10	\$20	\$0	\$5	\$4	\$20	\$20
F&B RESTRNT	Mean	\$117.01	\$148.01	\$85.29	\$53.17	\$93.70	\$175.75	\$95.71
	Median	\$50	\$100	\$10	\$10	\$50	\$103	\$0
OPT TOUR	Mean	\$108.04	\$128.06	\$87.55	\$115.12	\$92.03	\$127.95	\$72.50
	Median	\$0	\$0	\$0	\$50	\$0	\$0	\$0
GIFT- SELF	Mean	\$221.29	\$263.16	\$178.45	\$126.22	\$210.19	\$253.02	\$349.46
	Median	\$50	\$100	\$45	\$30	\$30	\$100	\$100
GIFT- OTHER	Mean	\$143.32	\$122.41	\$164.71	\$142.95	\$146.63	\$135.21	\$172.86
	Median	\$55	\$60	\$50	\$50	\$50	\$100	\$20
TRANS	Mean	\$19.98	\$25.40	\$14.44	\$10.15	\$12.77	\$32.54	\$16.25
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$275.61	\$255.25	\$296.45	\$127.65	\$228.24	\$308.18	\$631.61
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$23
TOTAL	Mean	\$981.73	\$1,056.67	\$905.07	\$628.68	\$868.60	\$1,152.58	\$1,478.39
	Median	\$700	\$887	\$600	\$500	\$600	\$955	\$1,000

On-Island Expenditures

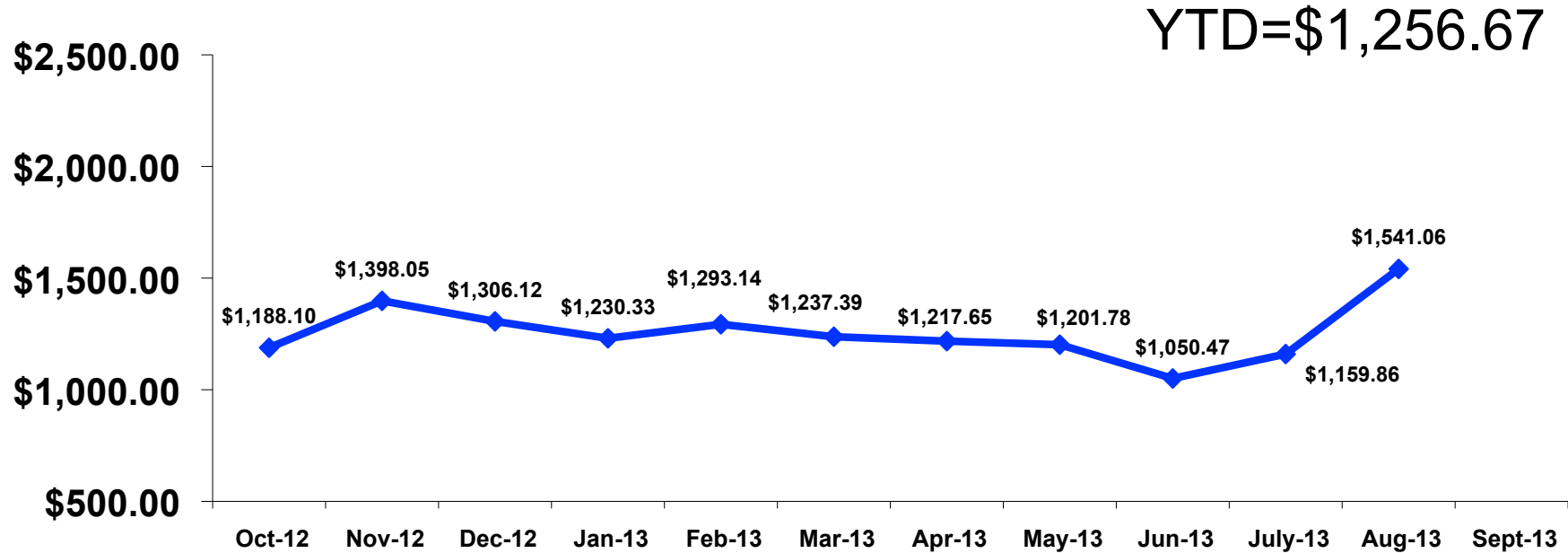
First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$57.44	\$45.65	\$71.10
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$41.24	\$34.93	\$48.96
	Median	\$10	\$0	\$20
F&B RESTRNT	Mean	\$117.01	\$93.00	\$146.11
	Median	\$50	\$10	\$100
OPT TOUR	Mean	\$108.04	\$109.56	\$106.92
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$221.29	\$173.90	\$278.03
	Median	\$50	\$30	\$100
GIFT- OTHER	Mean	\$143.32	\$158.98	\$125.72
	Median	\$55	\$50	\$74
TRANS	Mean	\$19.98	\$16.88	\$23.77
	Median	\$0	\$0	\$0
OTHER	Mean	\$275.61	\$286.94	\$263.95
	Median	\$0	\$0	\$0
TOTAL	Mean	\$981.73	\$921.42	\$1,057.86
	Median	\$700	\$600	\$900

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,541.06 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,493 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person



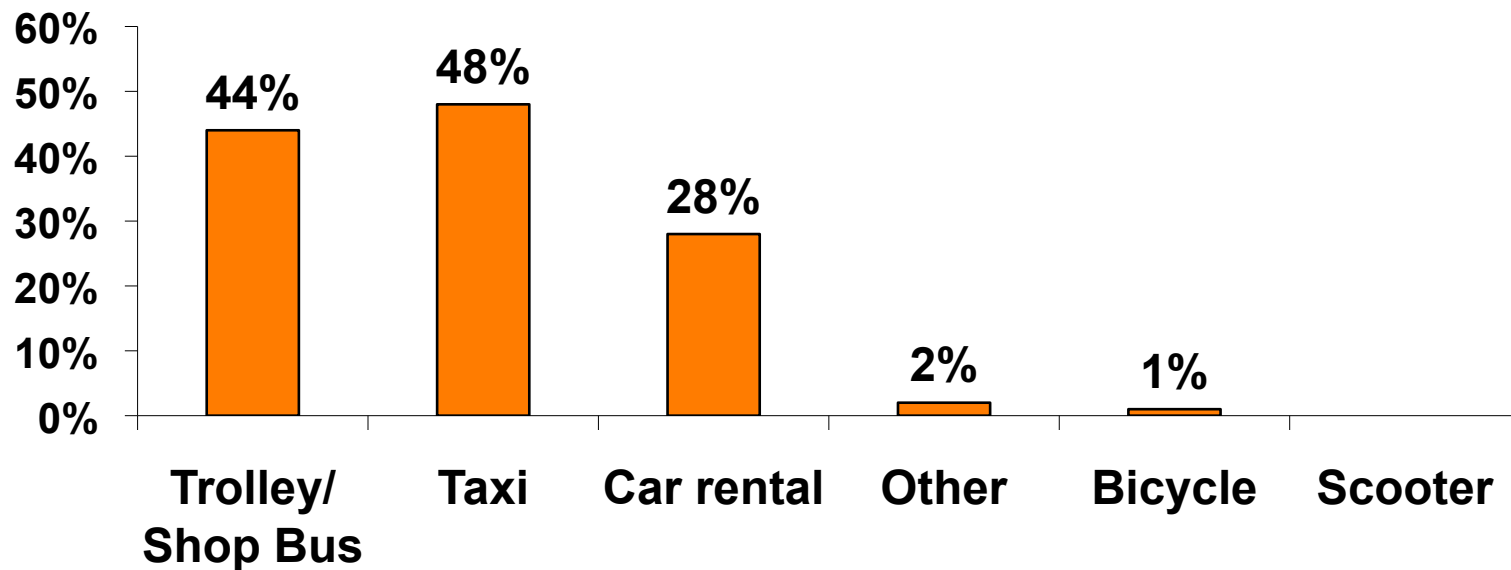
Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$57.44
Food & beverage in fast food restaurant/ convenience store	\$41.24
Food & beverage at restaurants or drinking establishments outside a hotel	\$117.01
Optional tours and activities	\$108.04
Gifts/ souvenirs for yourself/companions	\$221.29
Gifts/ souvenirs for friends/family at home	\$143.32
Local transportation	\$19.98
Other expenses not covered	\$275.61
Average Total	\$981.73

Local Transportation

n=87

Mean=\$19.98 per travel party



Guam Airport Expenditures

- \$35.35 = Mean
- \$10 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,200 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

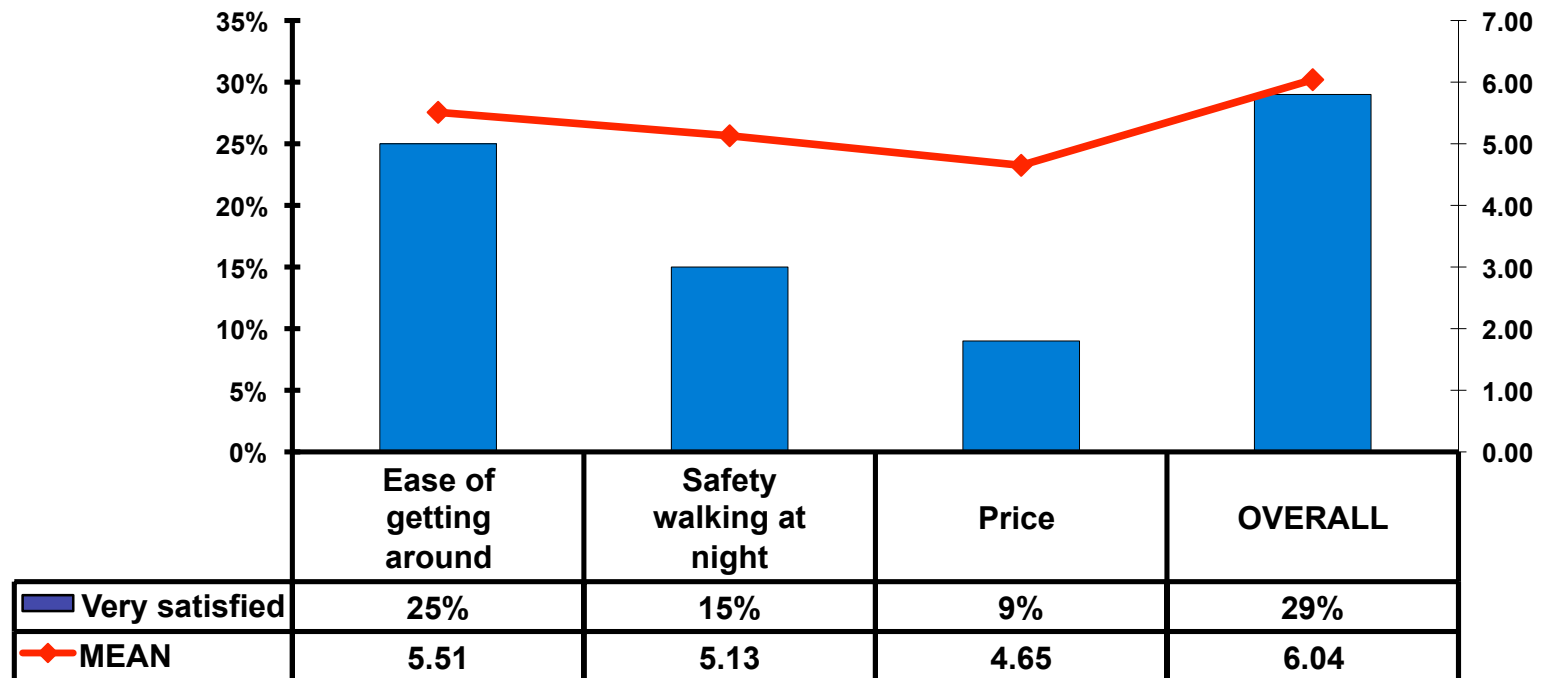
	MEAN \$
Food & Beverages	\$9.67
Gifts/Souvenirs Self	\$10.81
Gifts/Souvenirs Others	\$14.87
Total	\$35.35

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

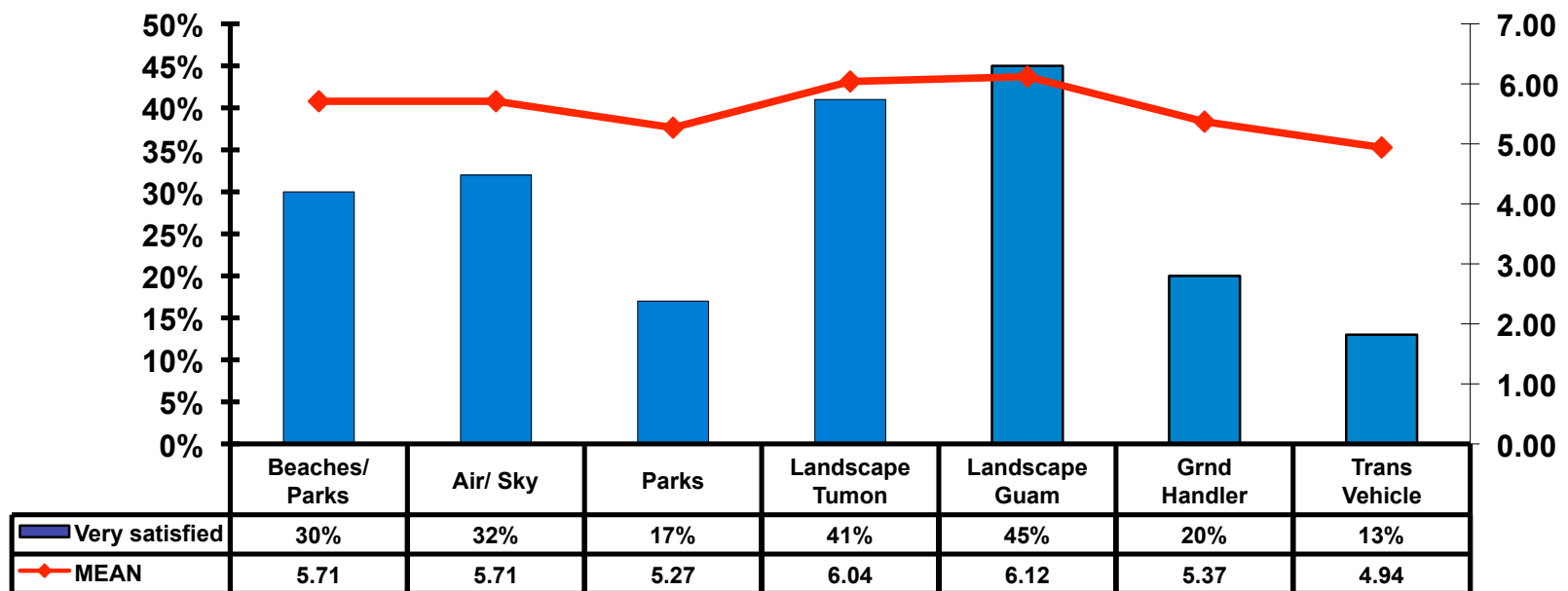
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

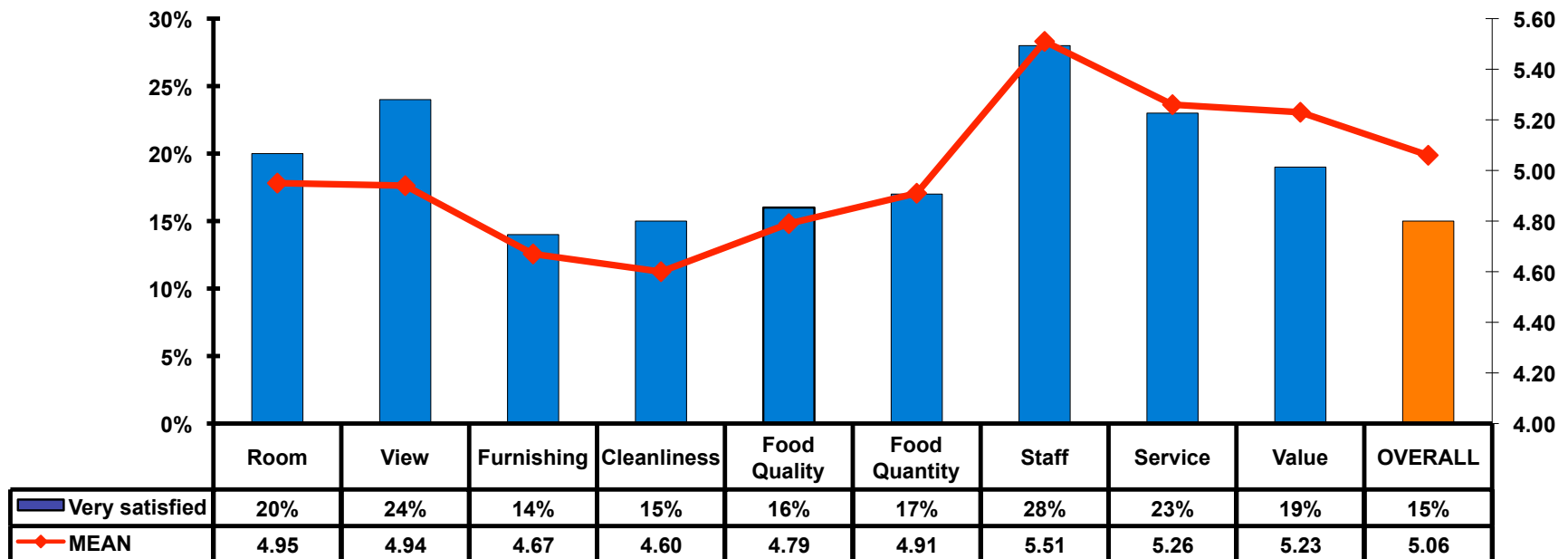
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

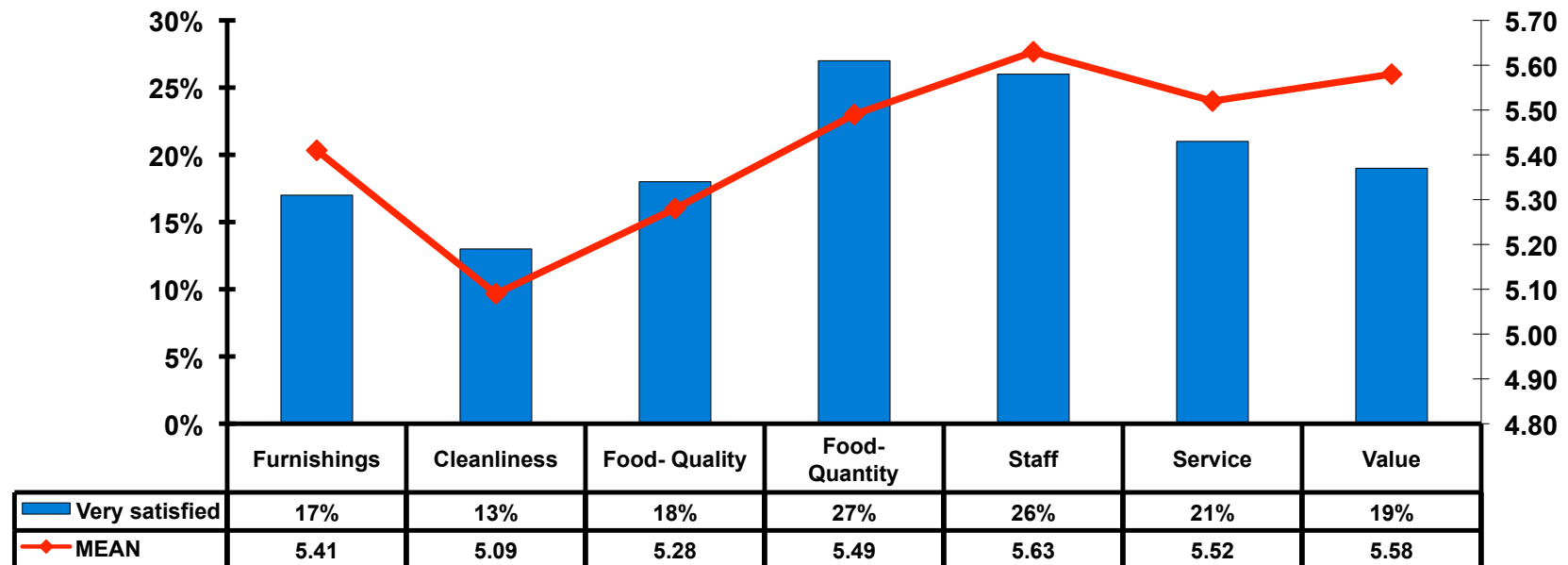
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

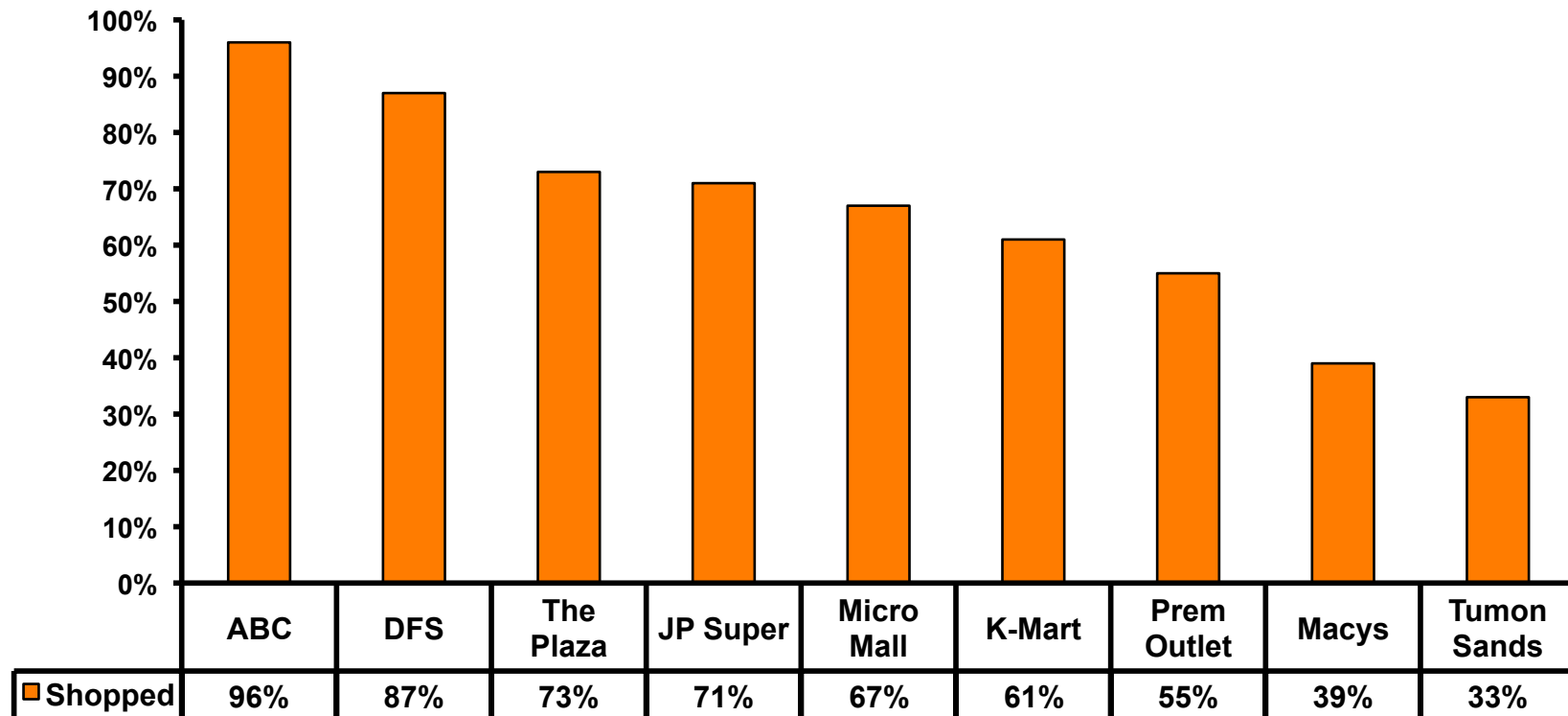
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

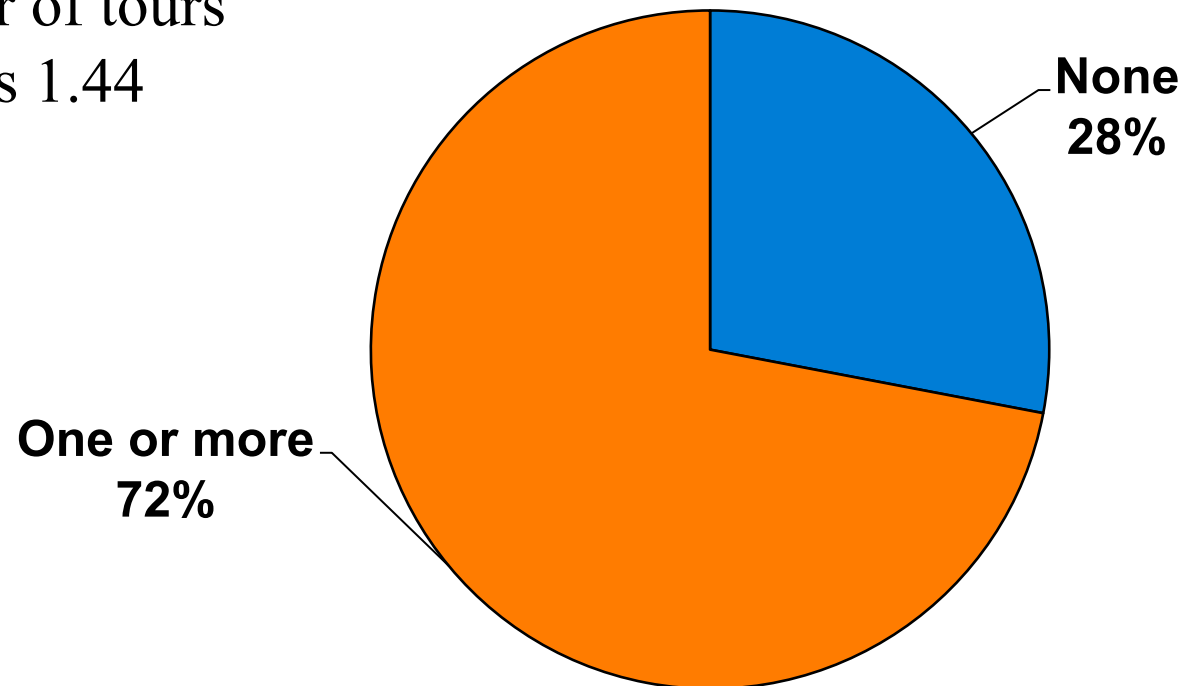
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

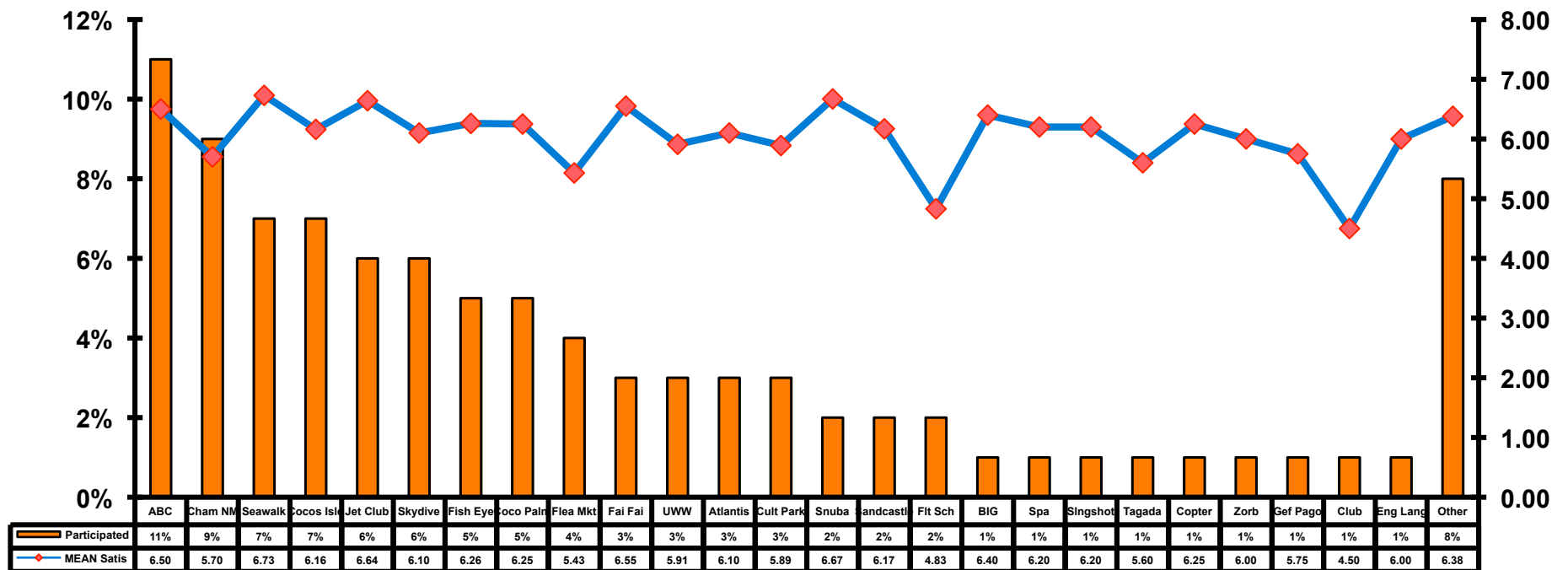
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 62%	Score of 6 to 7 = 56%
Score of 4 to 5 = 33%	Score of 4 to 5 = 37%
Score 1 to 3 = 5%	Score 1 to 3 = 7%
MEAN = 5.59	MEAN = 5.49

Optional Tour Participation

- Average number of tours participated in is 1.44



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 = 63%	Score of 6 to 7 = 61%
Score of 4 to 5 = 36%	Score of 4 to 5 = 39%
Score 1 to 3 = 0%	Score 1 to 3 = 0%
MEAN = 5.69	MEAN = 5.63

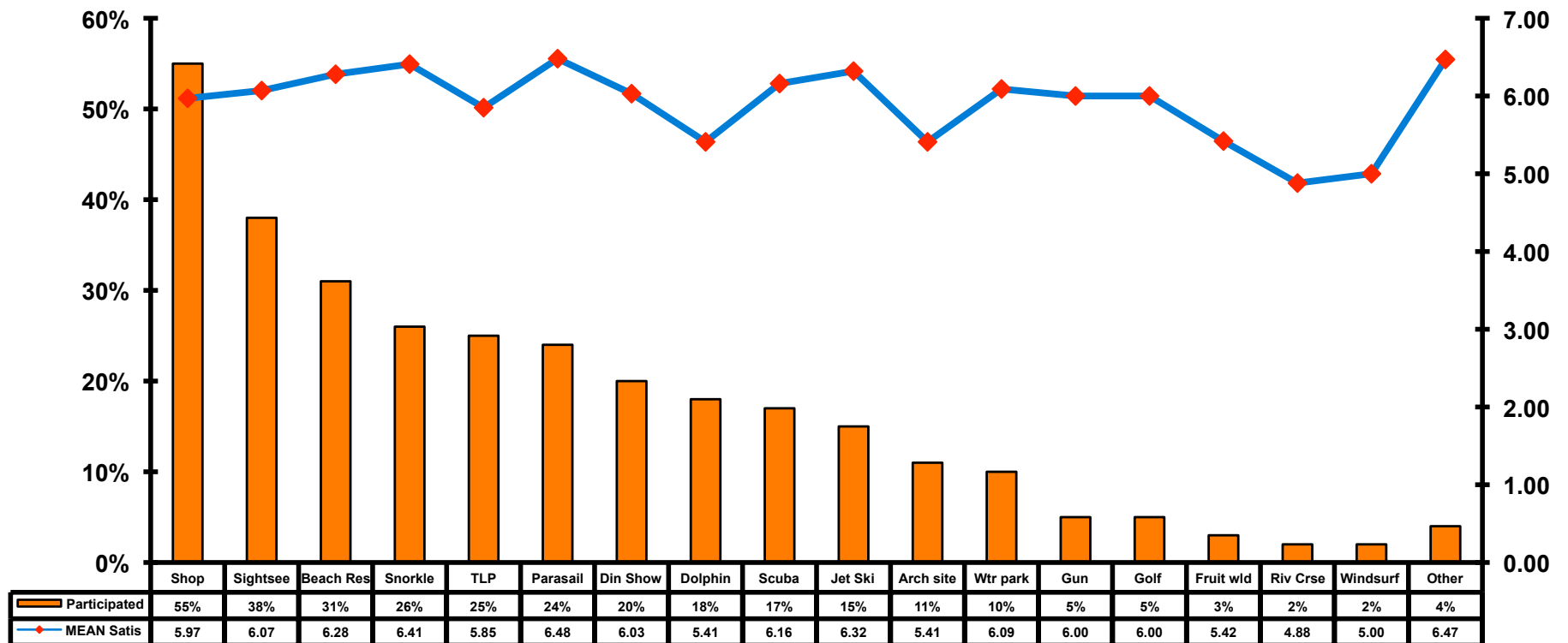
Night Tours Satisfaction

7pt Rating Scale

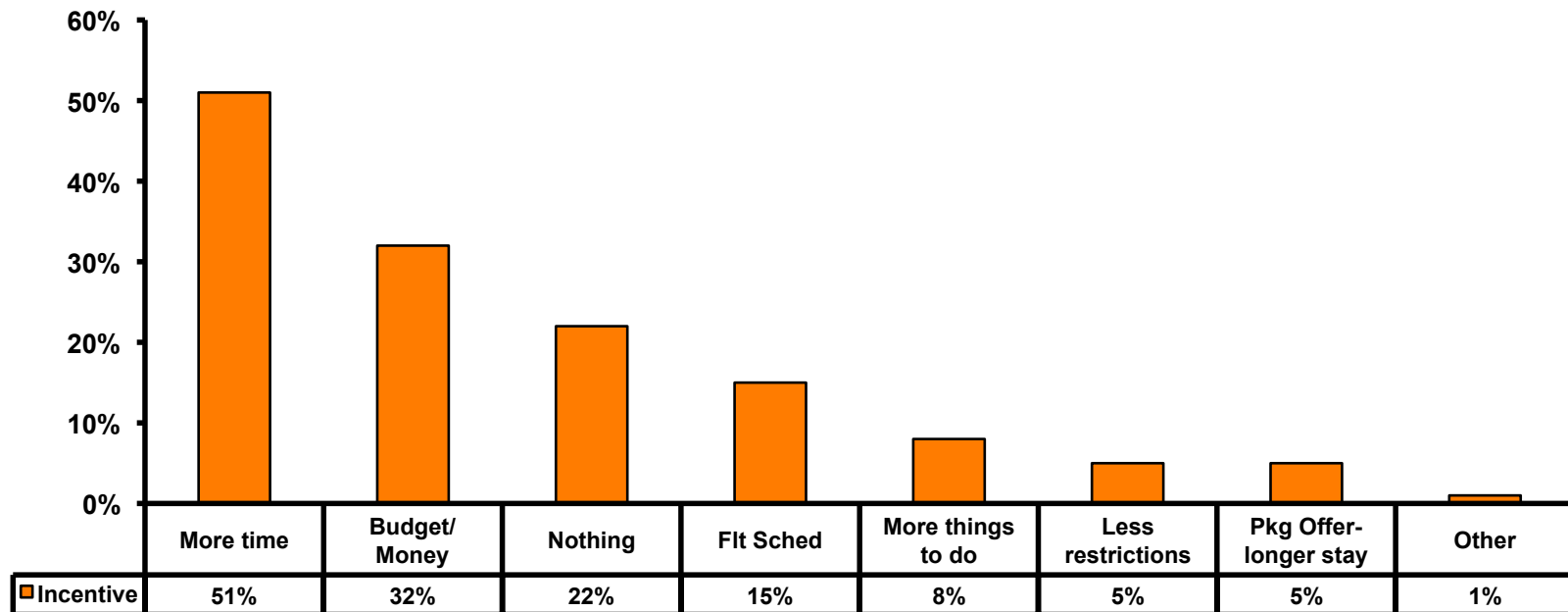
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 29%	Score of 6 to 7 = 28%
Score of 4 to 5 = 69%	Score of 4 to 5 = 70%
Score 1 to 3 = 2%	Score 1 to 3 = 2%
MEAN = 4.80	MEAN = 4.80

Satisfaction with Other Activities



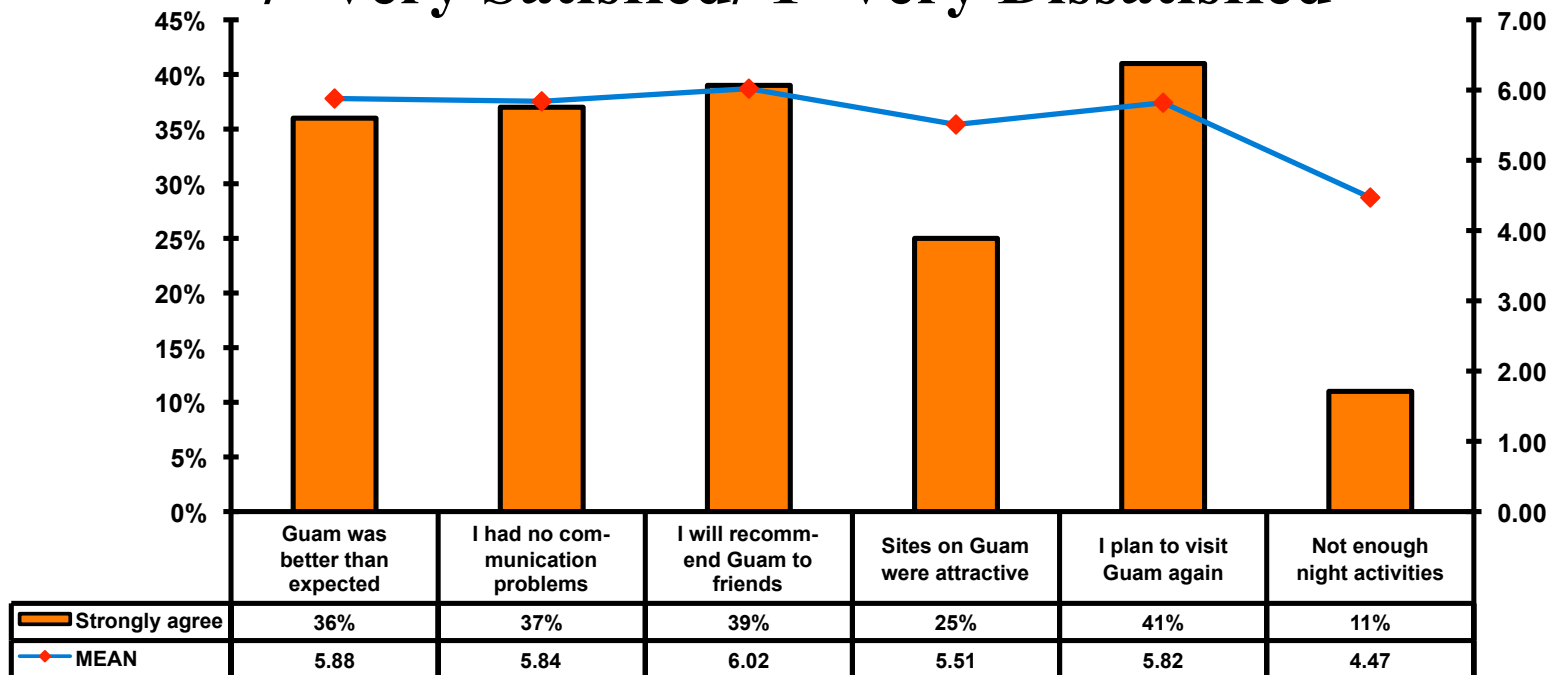
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

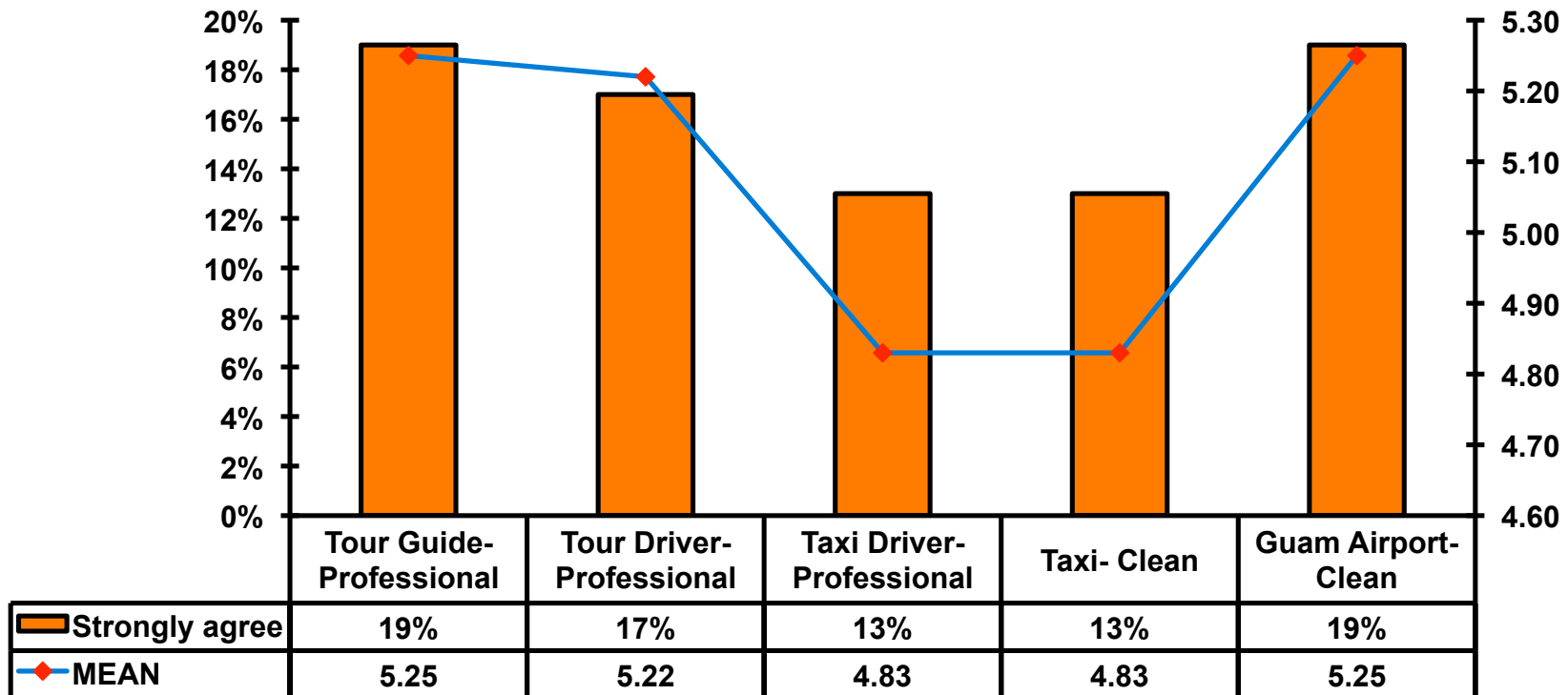
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

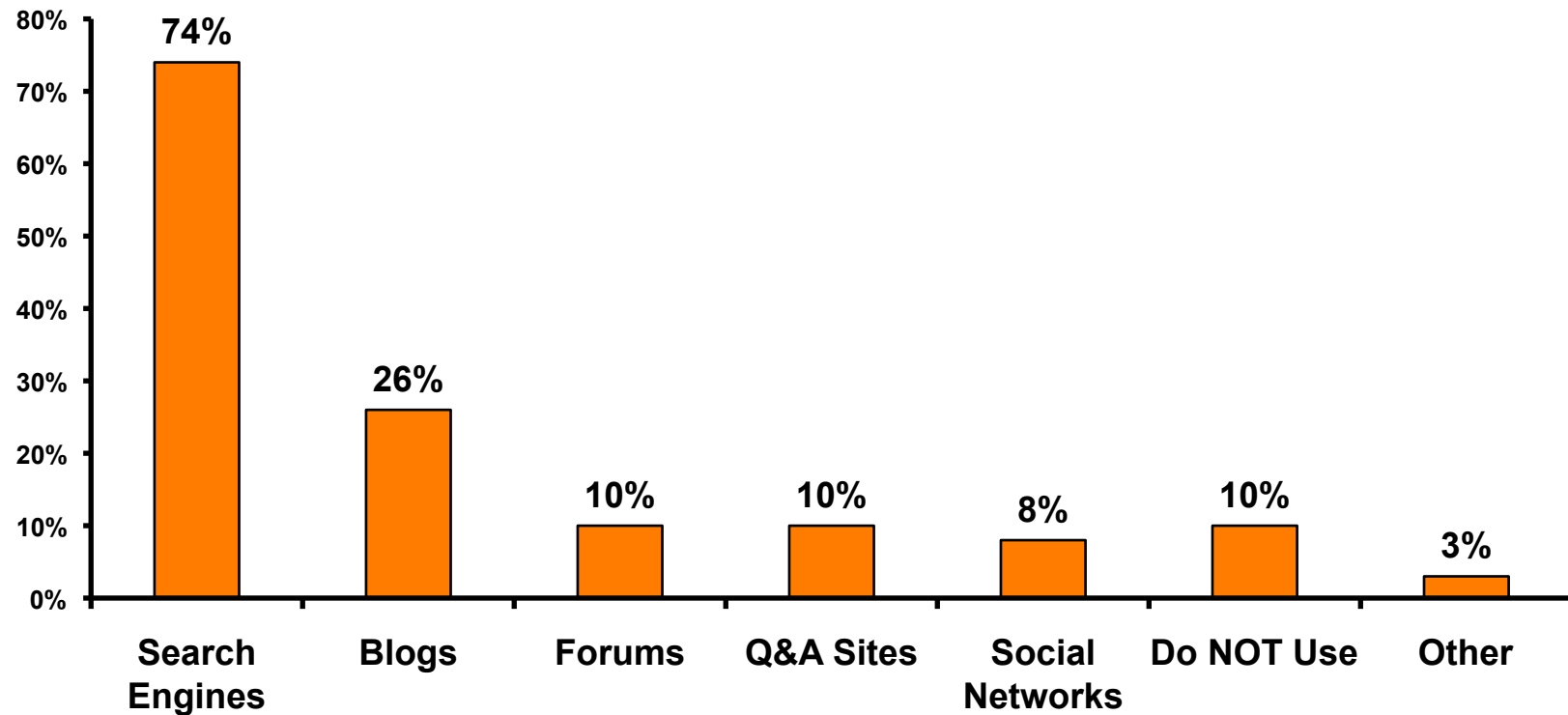
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



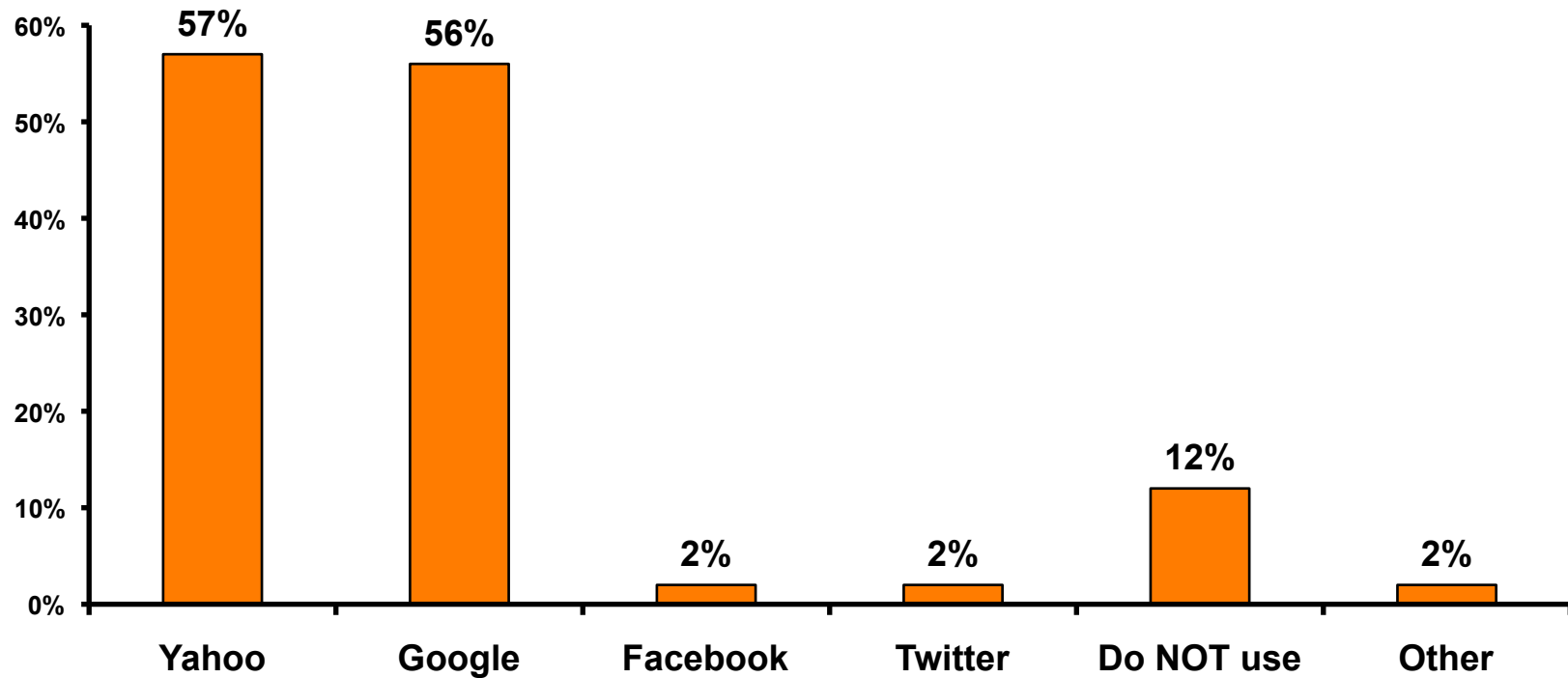
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

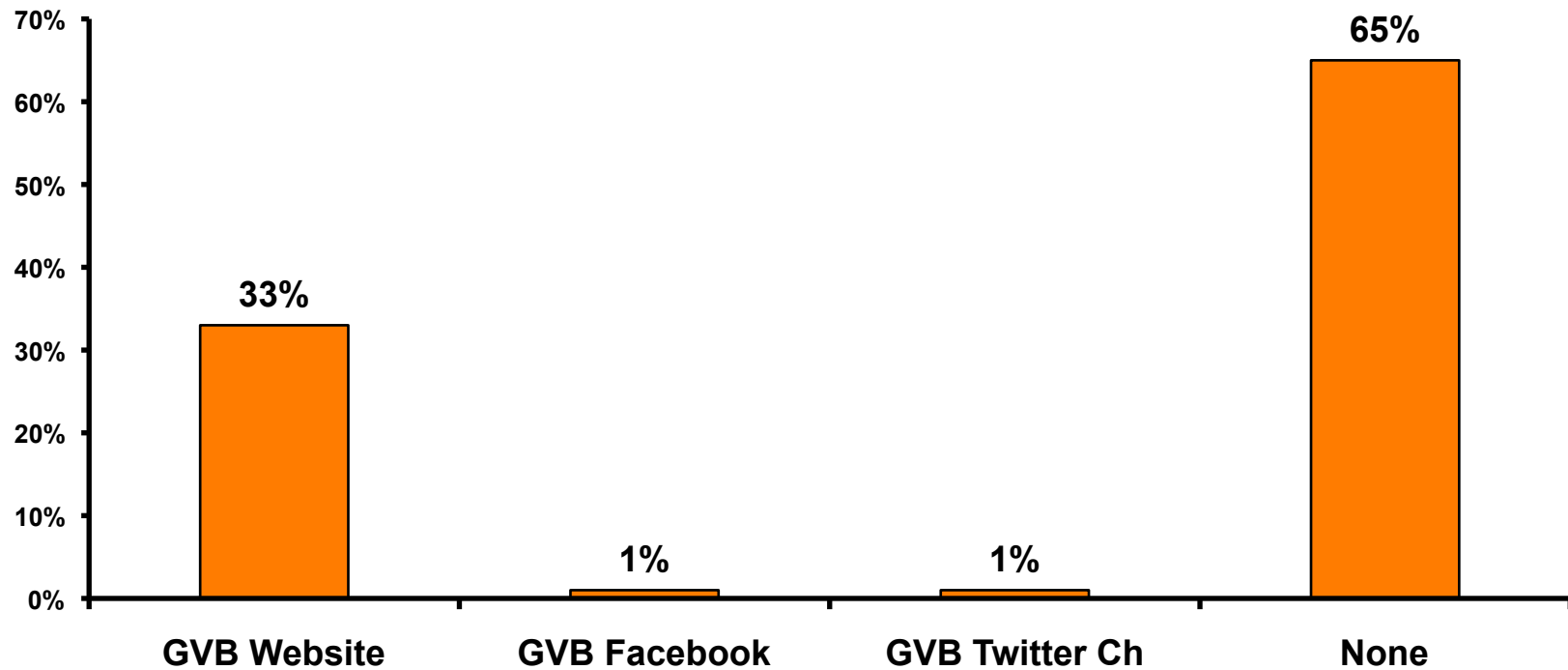


Internet- Things To Do

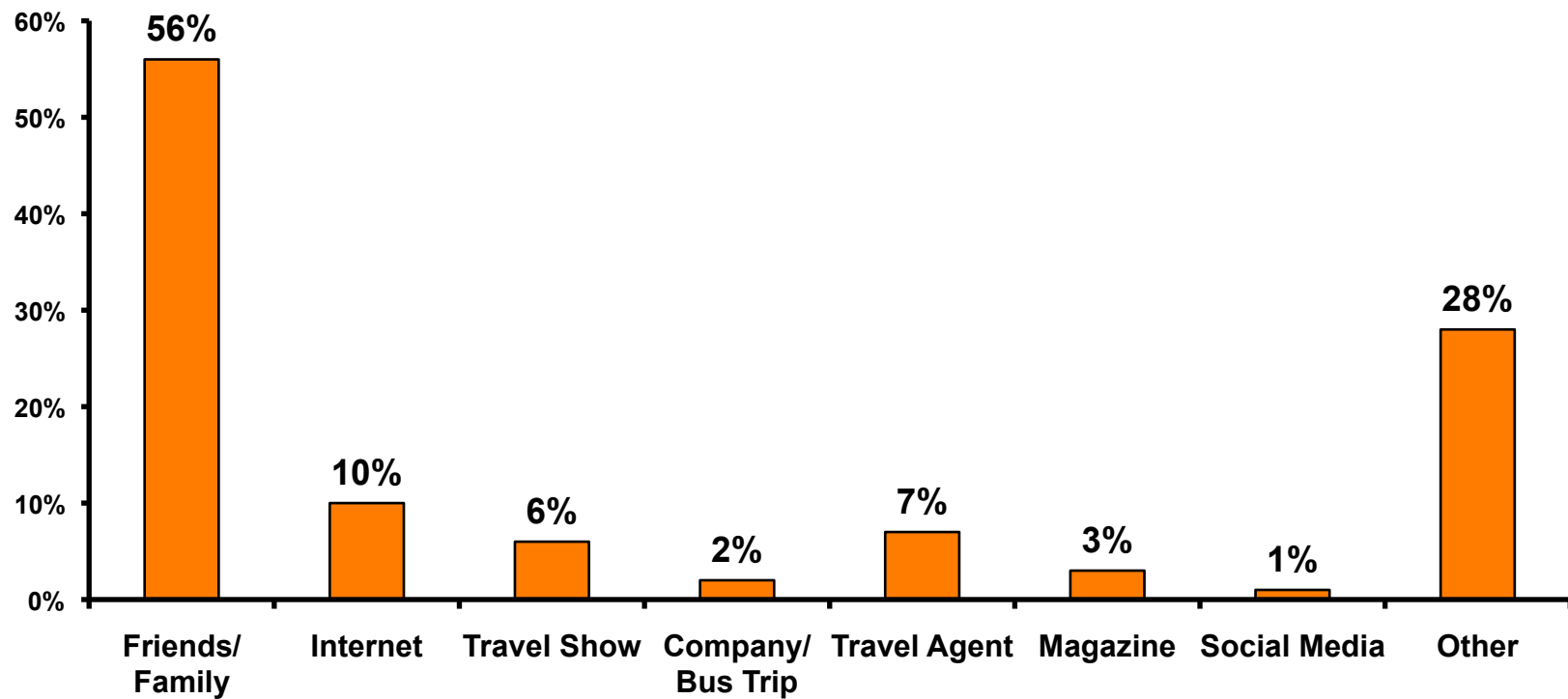
Sources of Info



Internet- GVB Sources

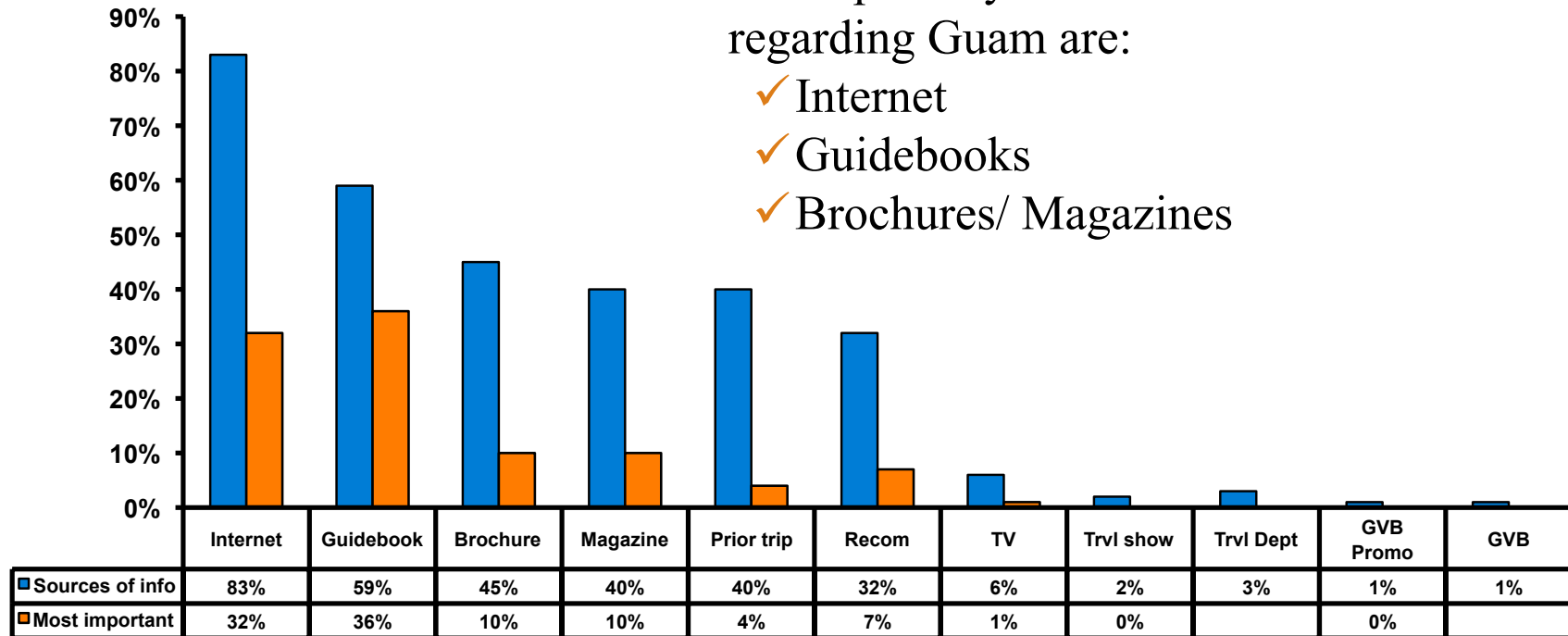


Travel Motivation- Info Sources



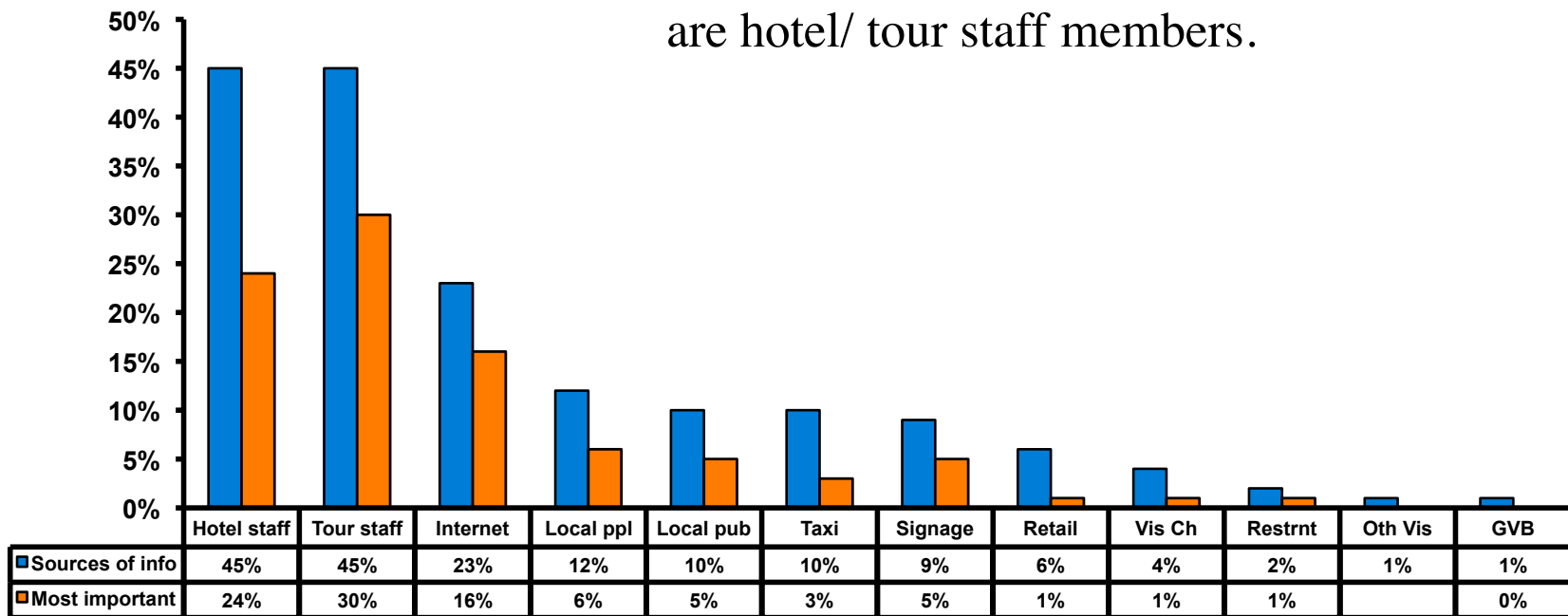
Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
 - ✓ Internet
 - ✓ Guidebooks
 - ✓ Brochures/ Magazines



Sources of Information Post-arrival

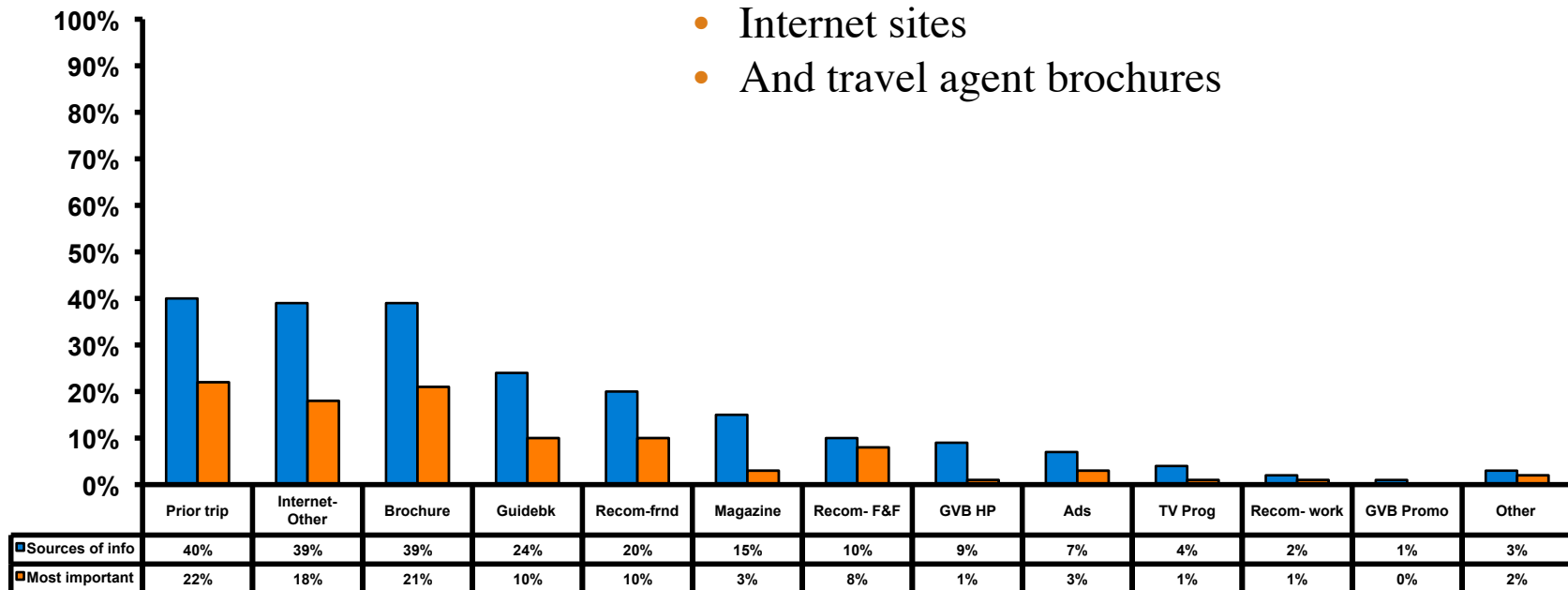
- The primary local source of information are hotel/ tour staff members.



Sources of Information - Motivation

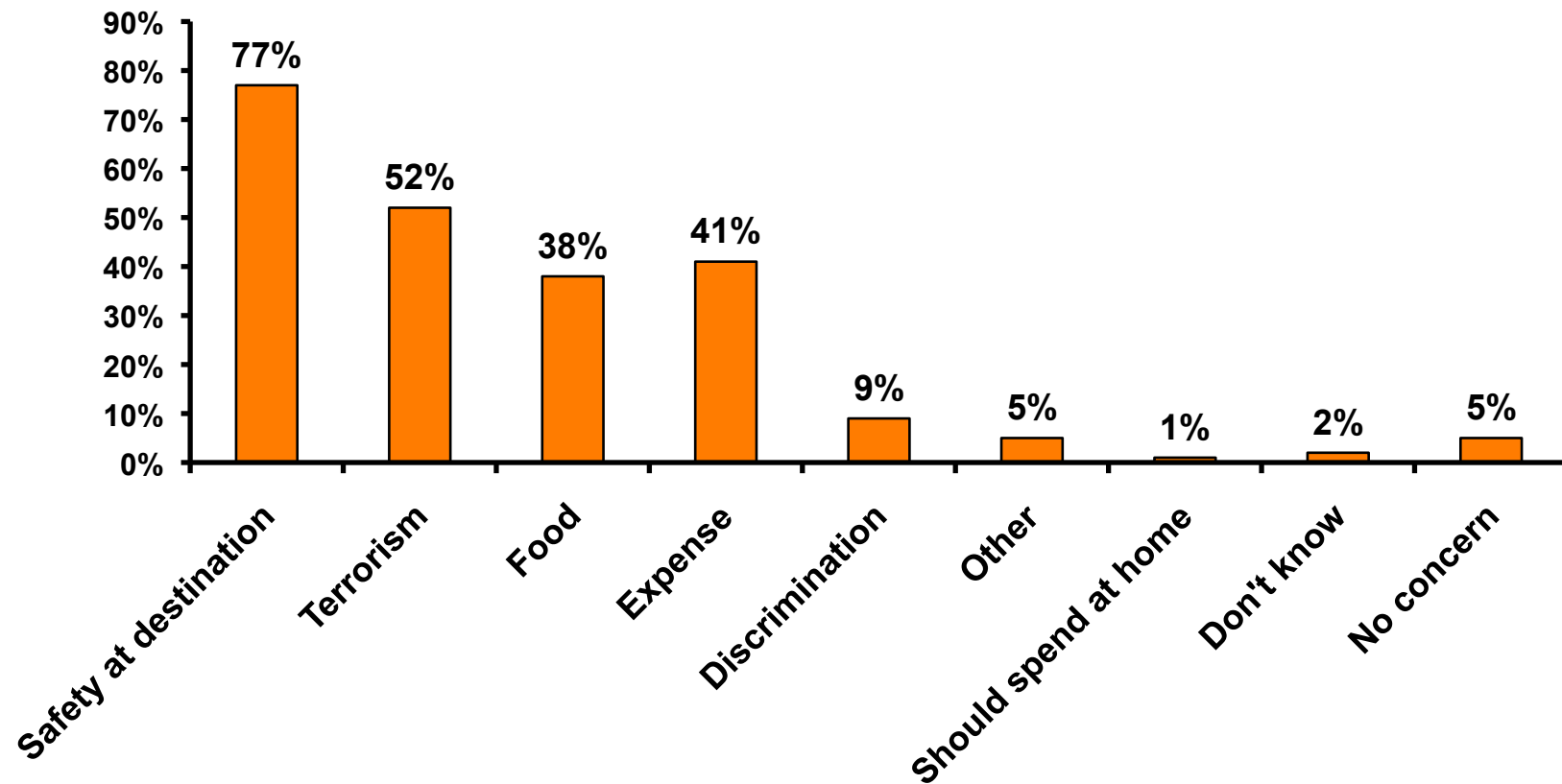
The primary motivational sources of information were.

- Prior trip to Guam,
- Internet sites
- And travel agent brochures



SECTION 6 **OTHER ISSUES**

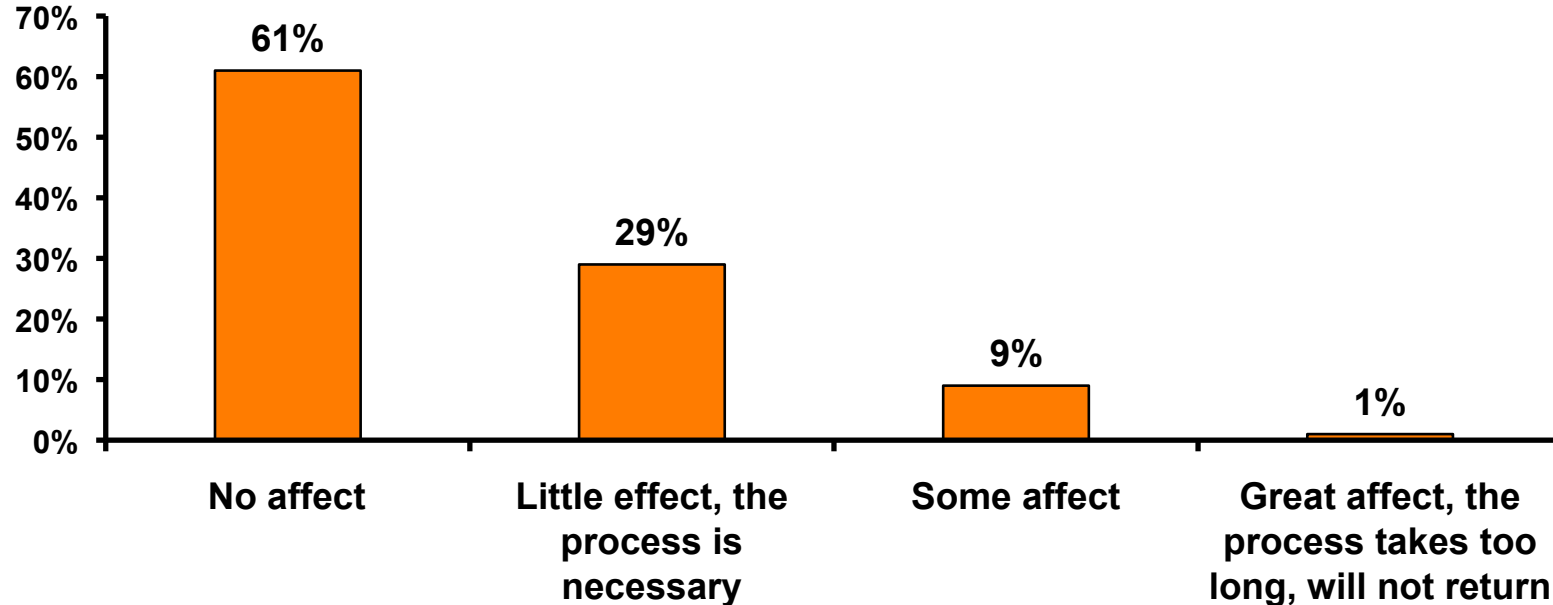
Concerns about travel outside of Japan - Overall



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	77%	82%	77%	77%	61%	100%	83%	69%	79%	67%	73%	83%	67%	
	Terrorism	52%	57%	48%	54%	46%	71%	70%	50%	40%	45%	46%	58%		
	Expense	41%	38%	45%	41%	29%	29%	50%	36%	31%	47%	46%	38%		
	Food	38%	40%	44%	34%	25%	57%	43%	44%	33%	43%	33%	35%		
	Discrimination against Japanese	9%	3%	10%	11%	11%		10%	6%	7%	10%	13%	10%		
	No concerns	5%	5%	4%	5%	11%		3%	3%	5%	7%	4%	6%	33%	
	Other	5%	2%	6%	4%	11%			11%	10%	5%	4%	4%		
	Don't know	2%	2%	2%	2%	4%					3%		1%		
	Should spend at home	1%	3%	2%	1%			3%			3%		1%		
	Total	Count	350	65	124	132	28	7	40	36	42	60	48	72	3

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

