



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2013

### DECEMBER 2012



**Prepared by: QMark Research**

*Information contained herein is the property of the Guam Visitors Bureau.*

*The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.*

# Background & Methodology

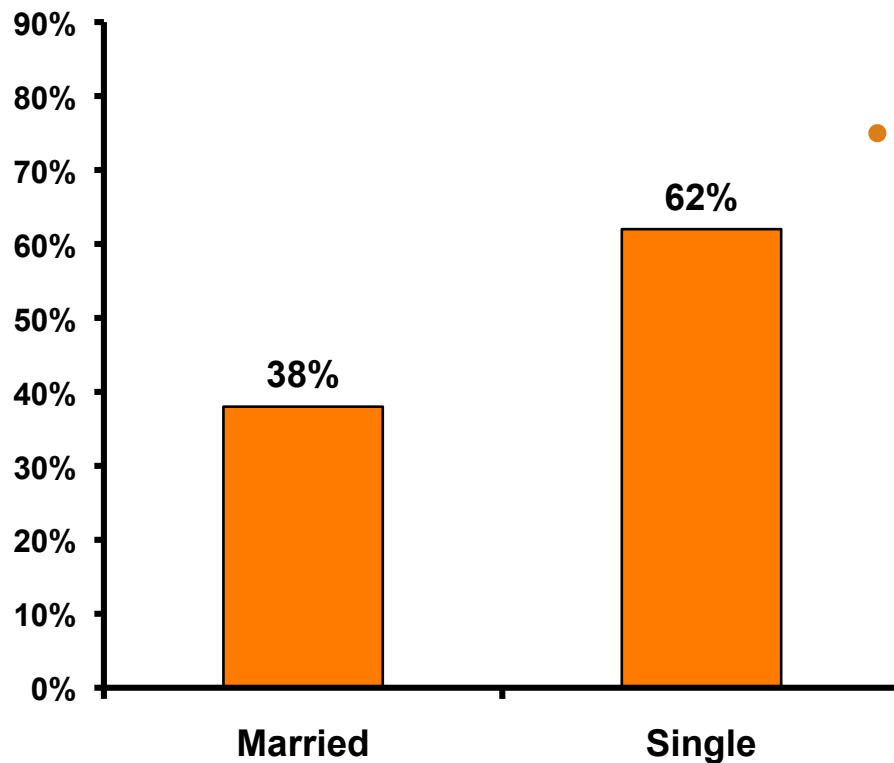
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing 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 **352** 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.

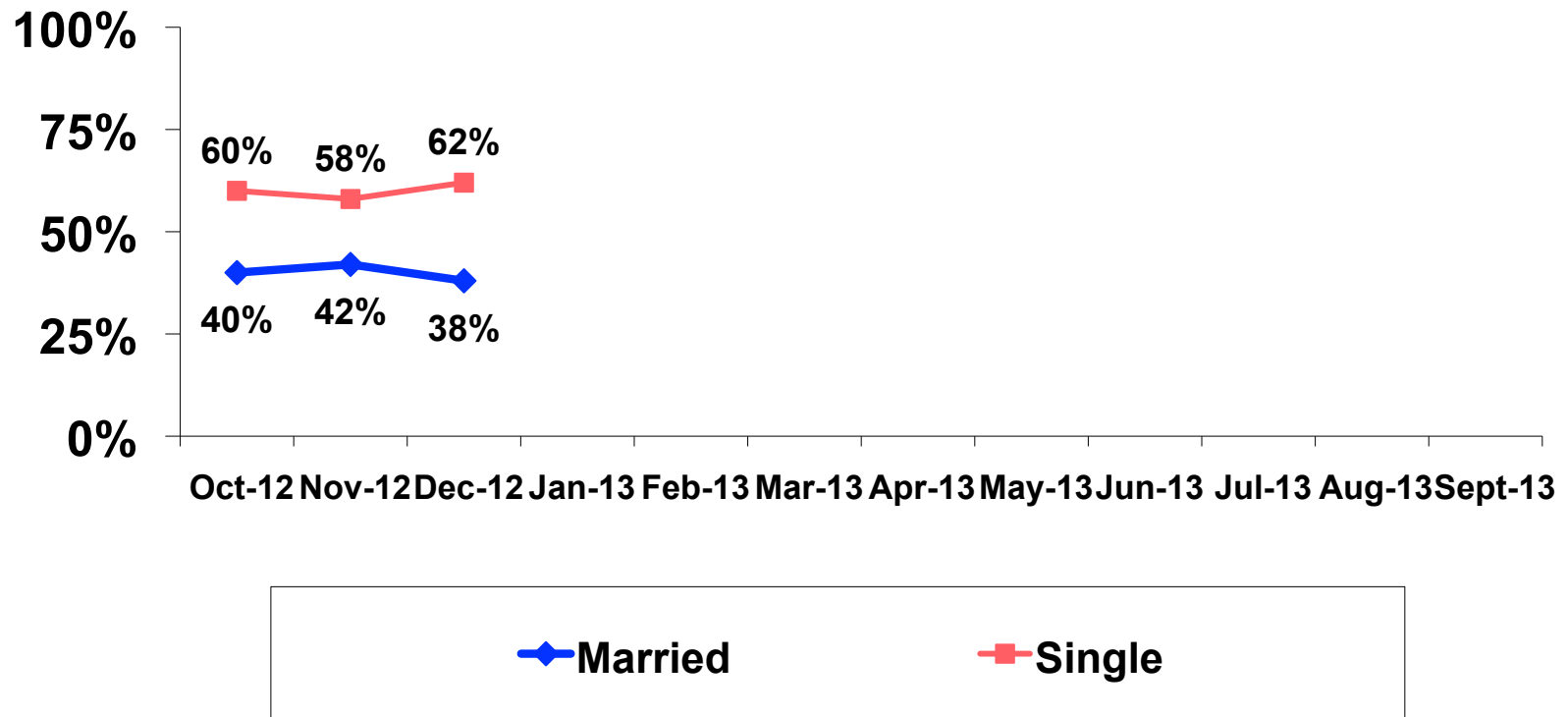
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

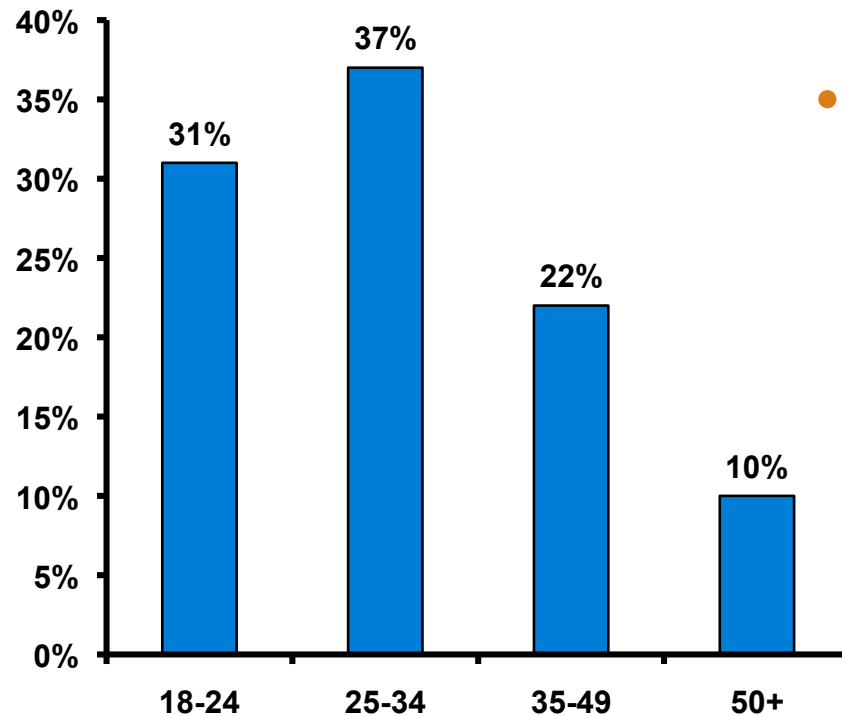


- 80% of female visitors are single.

# Marital Status

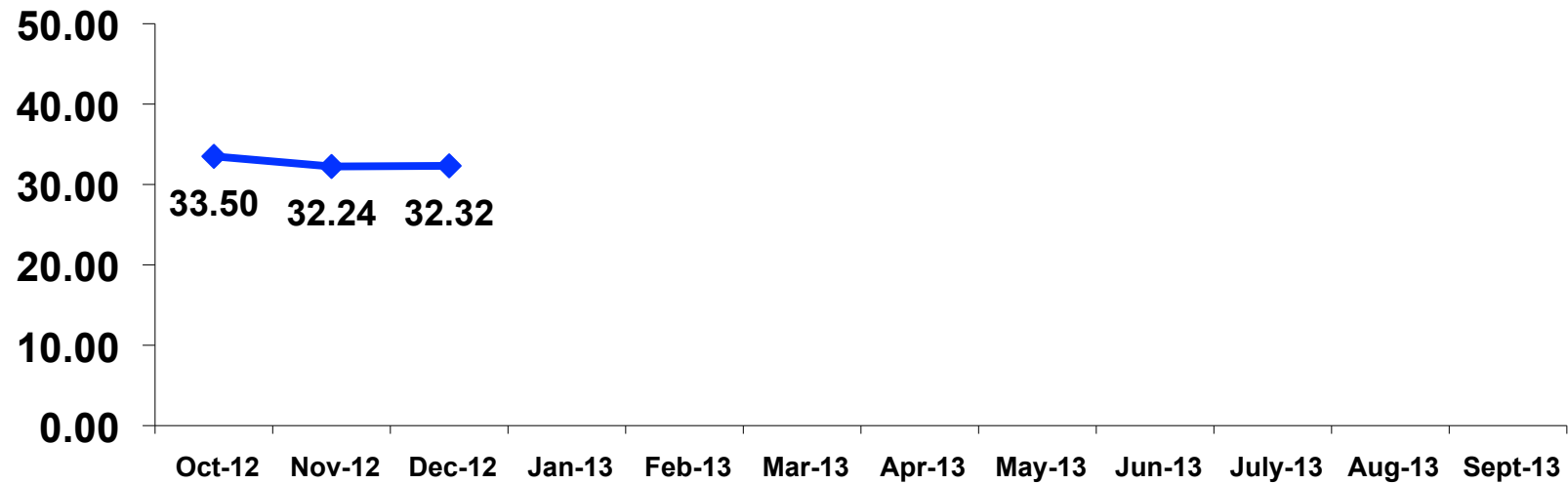


# Age - Overall



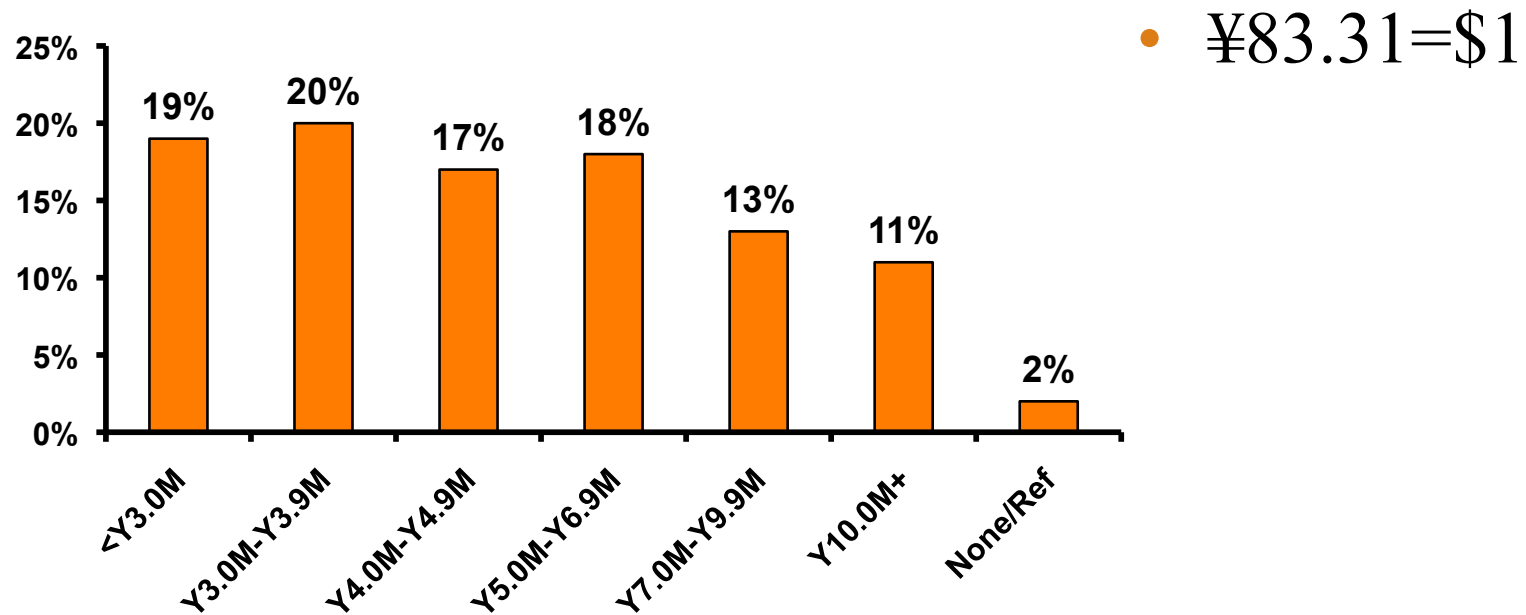
- The average age of the respondents is 32.32 years of age.

# Average Age

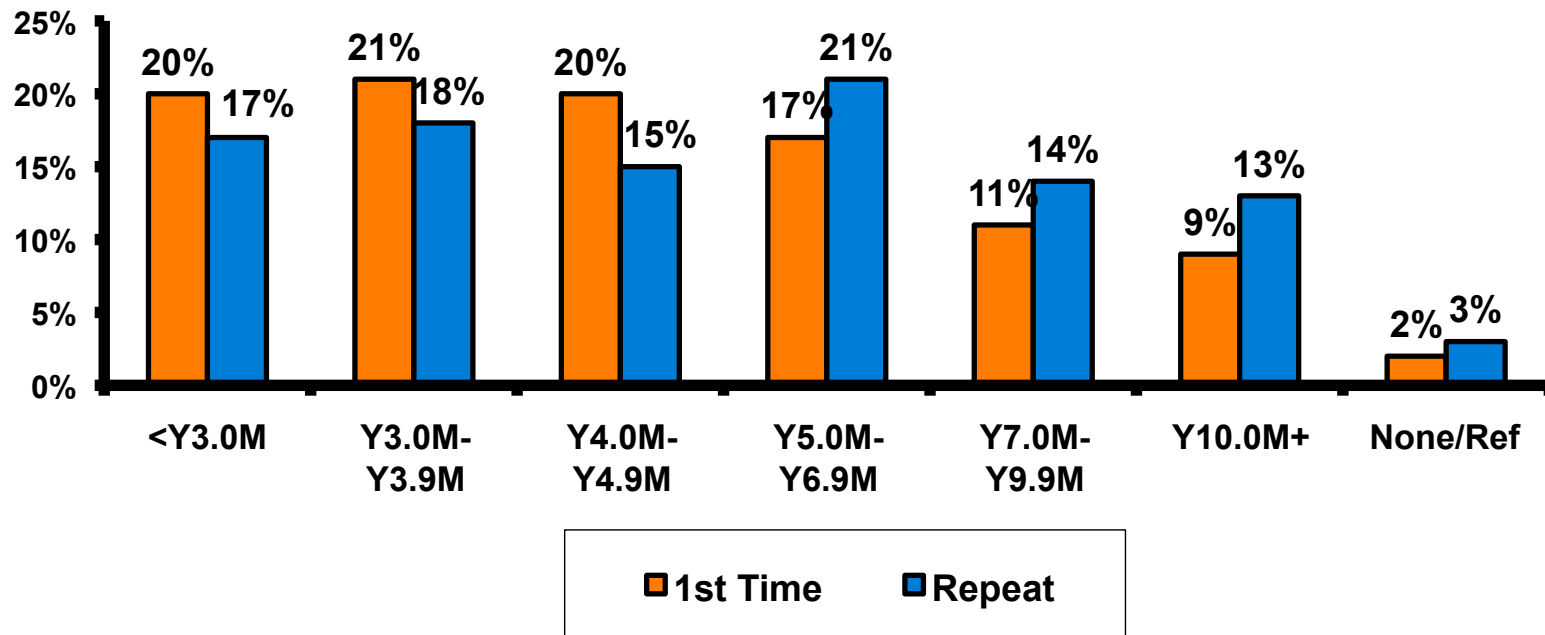




# Personal Income



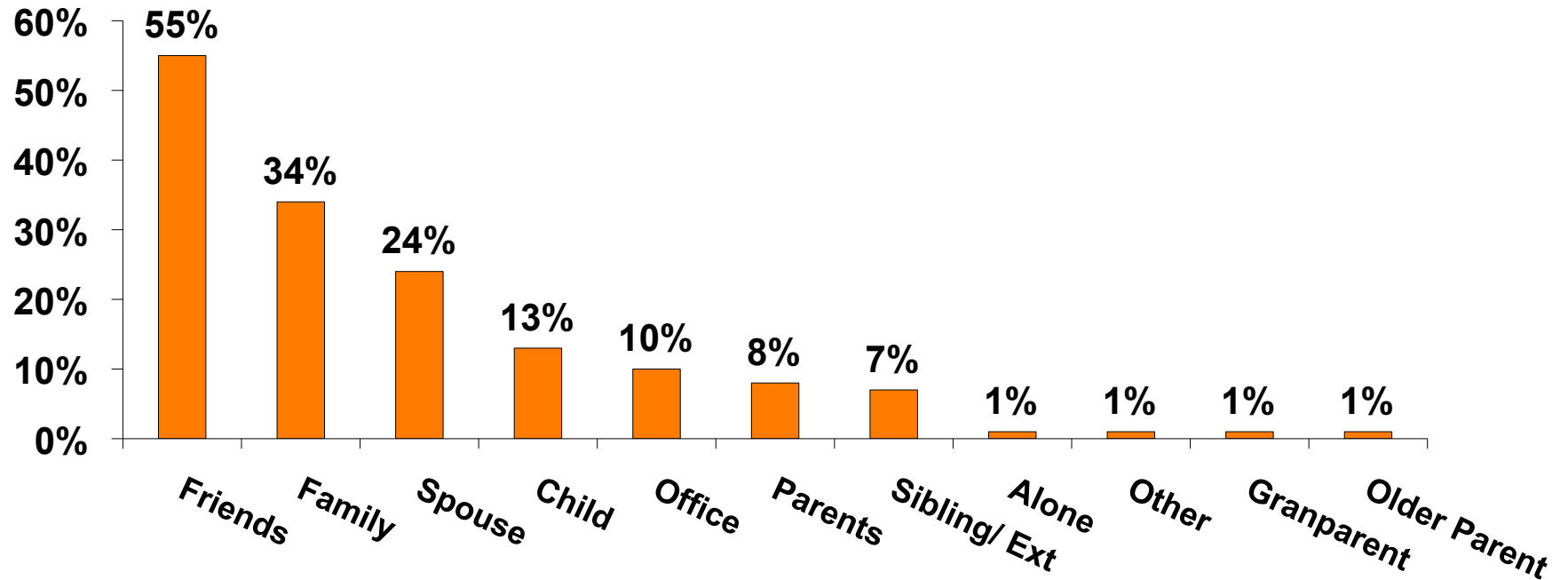
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	23	13	10	17	5	1	
		Column N %	8%	9%	7%	20%	4%	1%	
	Y2.0M-Y3.0M	Count	34	10	24	10	15	6	3
		Column N %	11%	7%	16%	12%	13%	9%	10%
	Y3.0M-Y4.0M	Count	61	28	33	6	38	8	9
		Column N %	20%	18%	22%	7%	32%	11%	31%
	Y4.0M-Y5.0M	Count	53	29	24	10	28	11	4
		Column N %	17%	19%	16%	12%	24%	16%	14%
	Y5.0M-Y7.0M	Count	55	29	26	13	15	21	5
		Column N %	18%	19%	17%	16%	13%	30%	17%
	Y7.0M-Y10.0M	Count	38	26	12	7	11	16	4
		Column N %	13%	17%	8%	8%	9%	23%	14%
	Y10.0M+	Count	33	14	19	16	6	7	4
		Column N %	11%	9%	13%	19%	5%	10%	14%
	No Income	Count	6	3	3	4	1		
		Column N %	2%	2%	2%	5%	1%		
	Total	Count	303	152	151	83	119	70	29

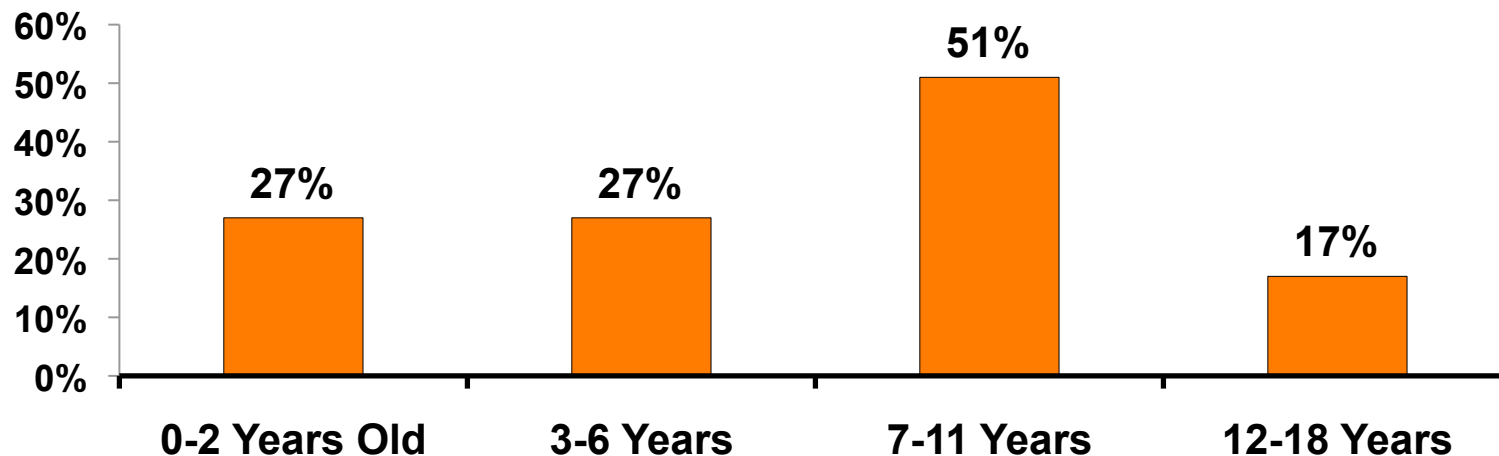
# Travel Companions



# Number of Children Travel Party

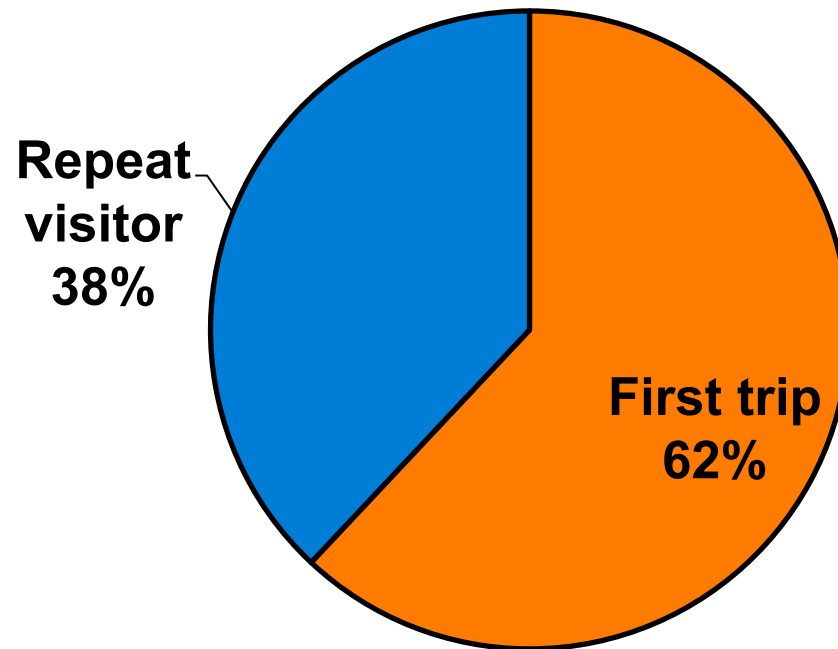
N=41 total respondents traveling with children.

(Of those N=41 respondents, there is a total of 55 children 18 years or younger)

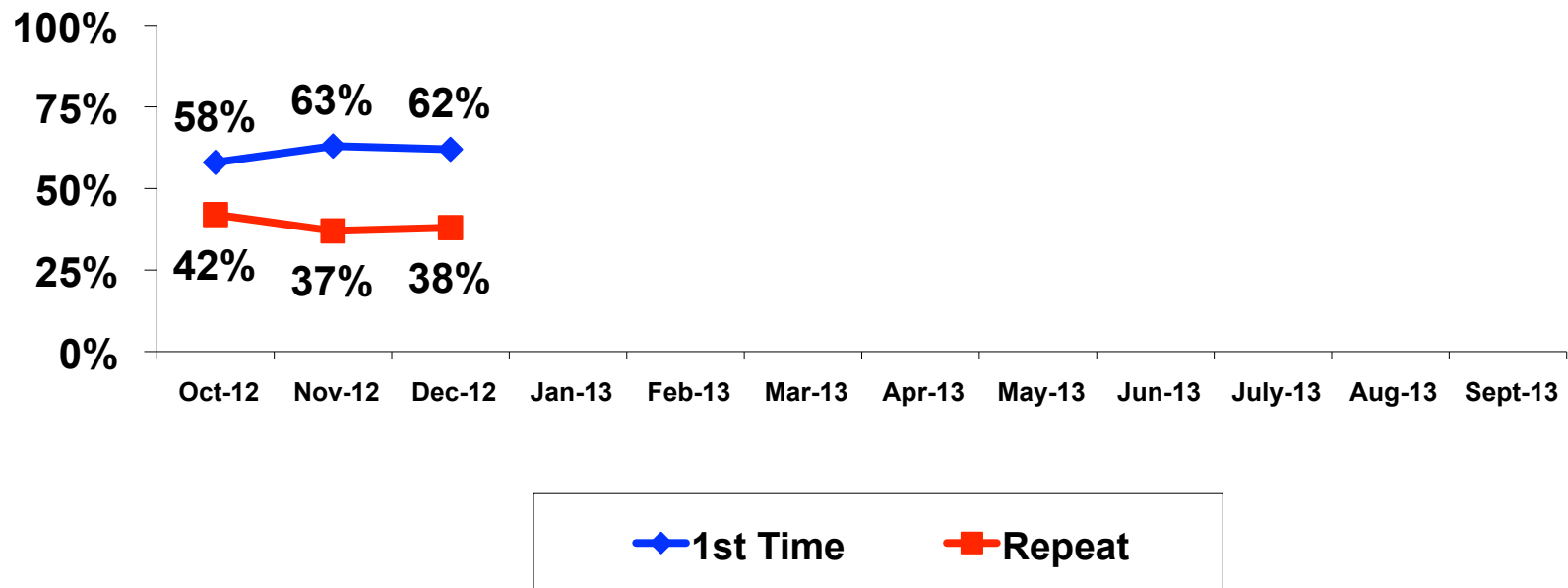


---

# Prior Trips to Guam



# Prior Trips to Guam



# Trips to Guam by Age & Gender

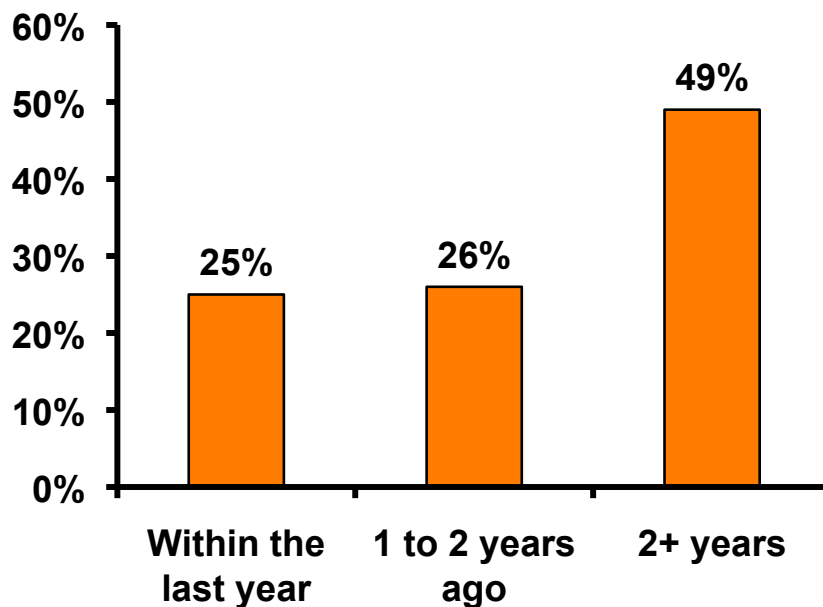
			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	180	104	75
		Column N %	51%	48%	57%
	Female	Count	172	113	56
		Column N %	49%	52%	43%
	Total	Count	352	217	131
		Column N %			
AGE	18-24	Count	108	87	21
		Column N %	31%	41%	16%
	25-34	Count	128	85	41
		Column N %	37%	40%	32%
	35-49	Count	77	25	50
		Column N %	22%	12%	38%
	50+	Count	33	15	18
		Column N %	10%	7%	14%
	Total	Count	346	212	130

- First-time visitors tend to be younger than repeat visitors to Guam.



# Repeat Visitors Last Trip

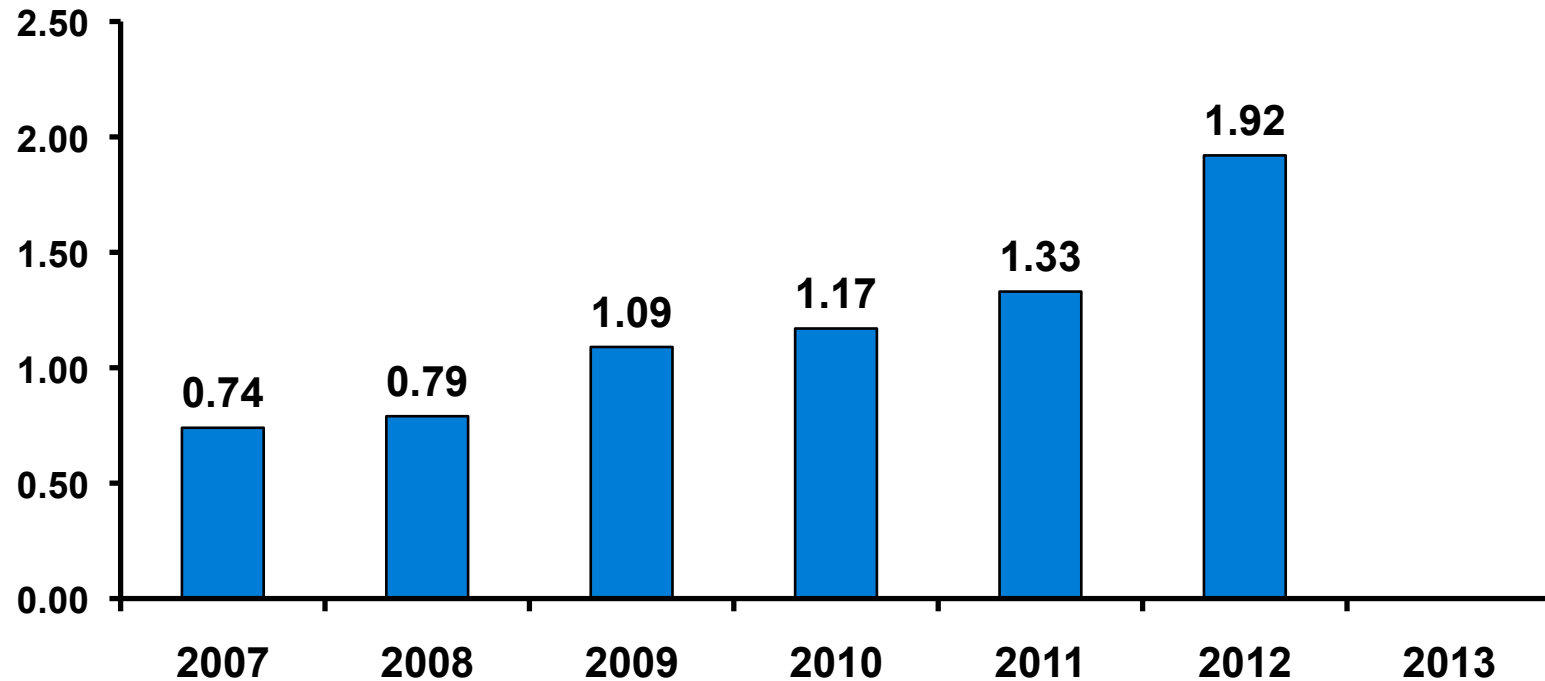
n = 128



- The average repeat visitor has been to Guam 3.22 times.
- Half the repeat visitors have been to Guam within the last 2 years.

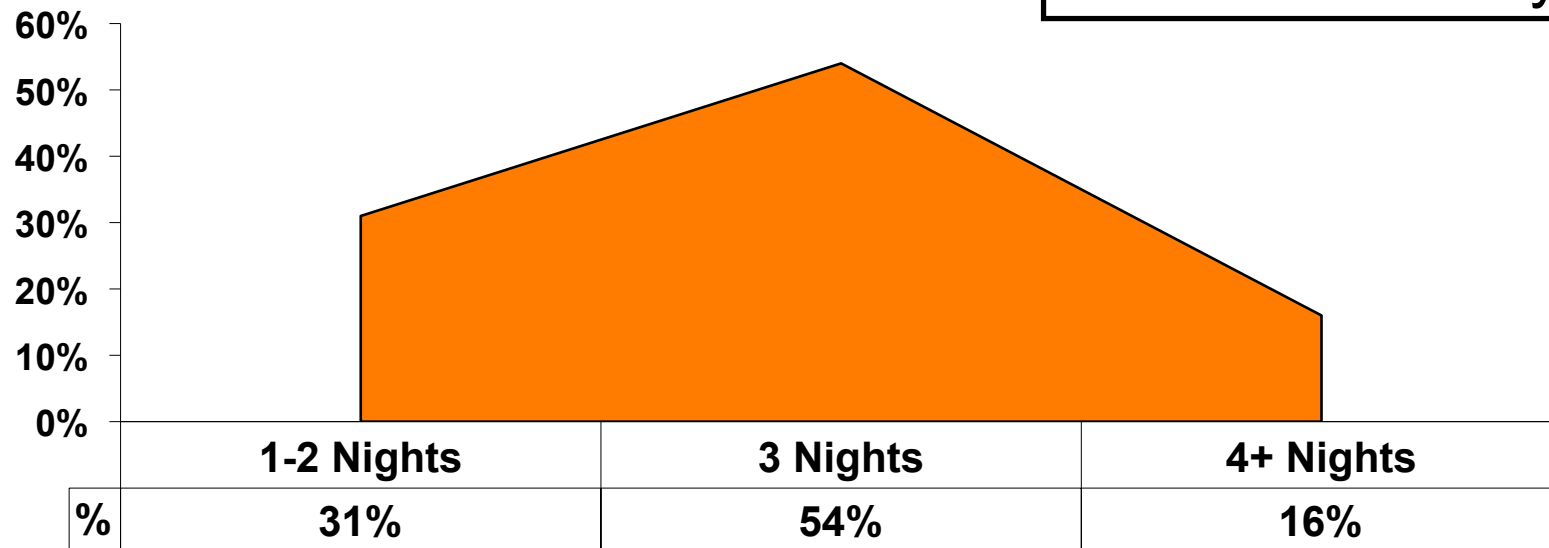
---

# Average Number Overnight Trips (2007-2013) (2 nights or more)

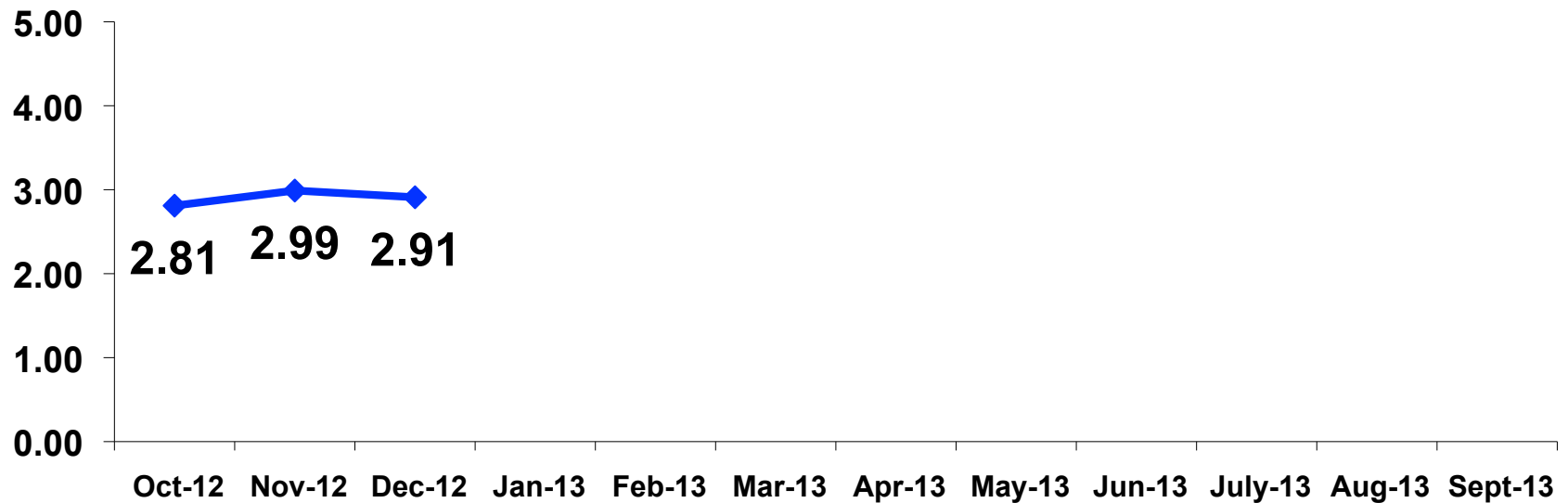


# Length of Stay

Mean = 2.91 Days  
Median = 3.0 Days



# Average Length of Stay

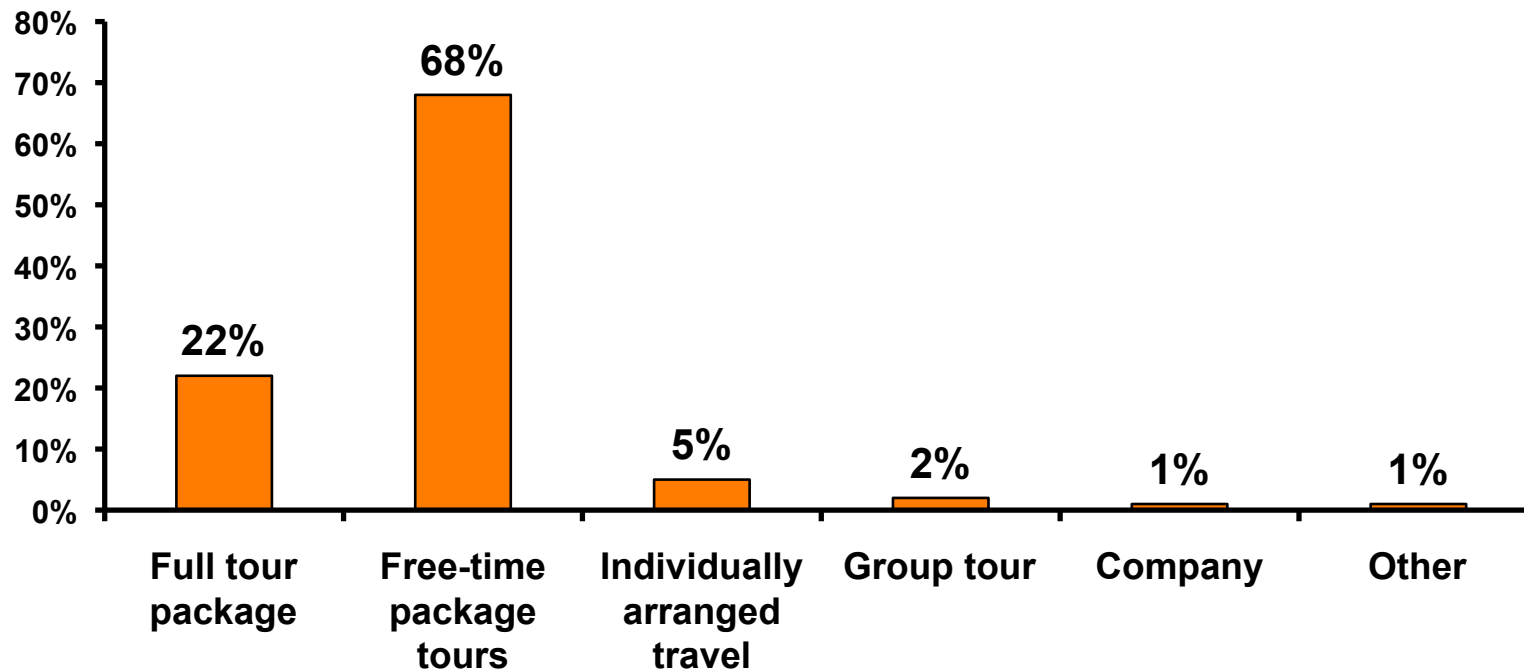


# Occupation by Income

	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 Student	20%	48%	12%	2%	11%	13%	11%	36%	83%	
Office worker non-mgr	17%	17%	32%	20%	19%	16%	8%	12%		
Engineer	15%	9%	12%	25%	21%	9%	18%	6%		
Salesperson	14%	9%	6%	18%	15%	22%	18%	9%		
Skilled worker	5%	9%	6%	5%	8%	5%		3%		
Homemaker	4%		9%	3%		5%	11%	6%		
Manager	4%			5%	2%	9%	8%			
Professional/ Specialist	3%		3%	5%	4%	4%	3%	3%		
Self-employed	3%				9%	4%	5%	6%		
Other	3%	4%	6%	3%	4%	2%		6%		
Govt- office worker non-mgr	2%		3%	5%	2%	2%				
Unemployed	2%		6%		2%	2%	3%		17%	
Freeter	2%	4%	3%	2%	2%	2%				
Teacher	2%		3%	2%	2%	4%	3%			
Govt- Manager	1%						11%	3%		
Retired	1%			3%		2%	3%			
Executive (30+ employees)	1%			2%				9%		
Free-lancer	0%									
Total	Count	335	23	34	60	53	55	38	33	6

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



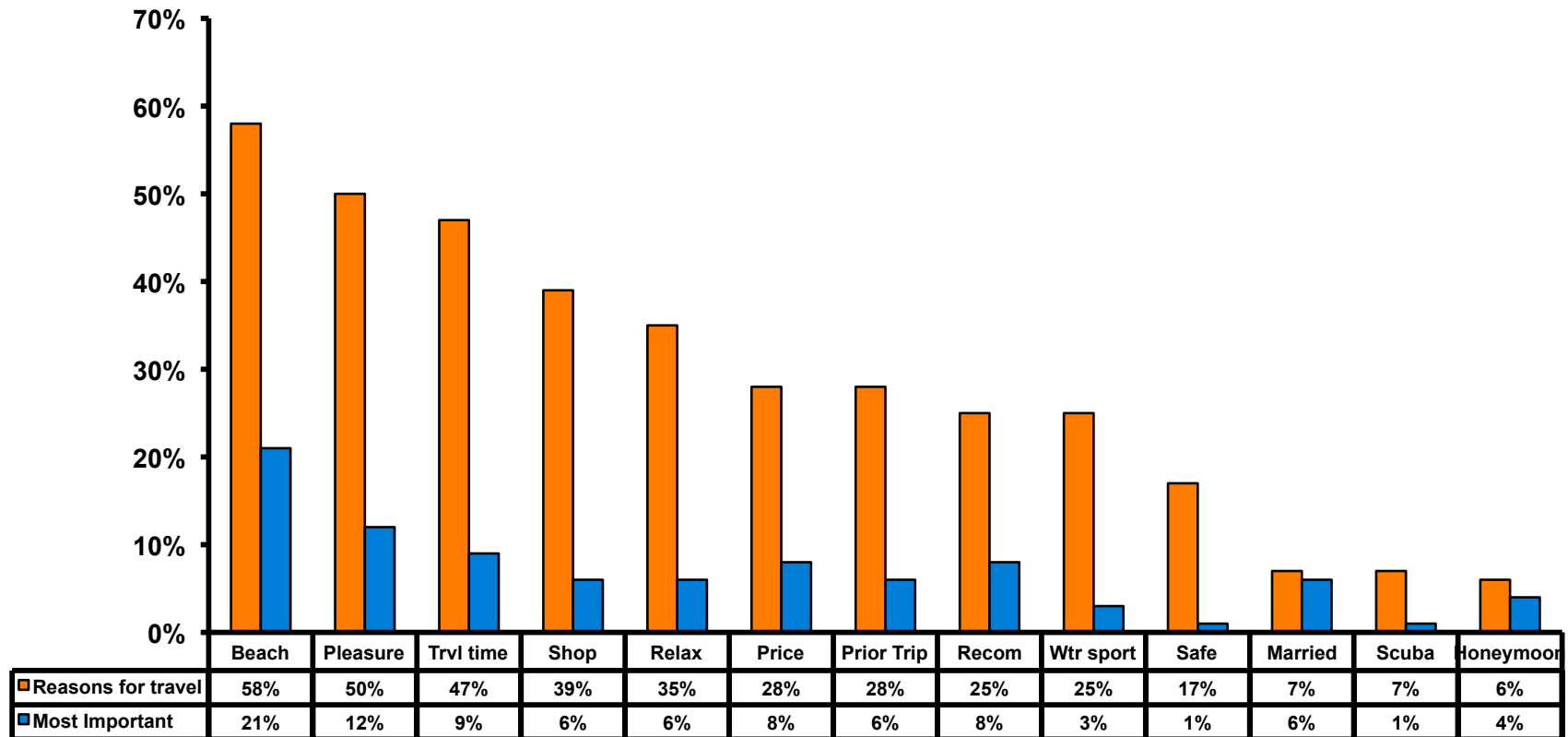
# Accommodation by Income

Average length of stay: 2.91 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	21%	26%	24%	16%	15%	24%	16%	22%	67%	
Hotel Nikko Guam	10%	17%	9%	11%	11%	13%	5%	9%		
Grand Plaza Hotel	8%	9%	12%	3%		7%	11%	22%		
Oceanview Hotel	8%	13%	15%	7%	9%	5%		3%		
PIC Club	7%		3%	5%	8%	5%	13%	6%	33%	
Westin Resort Guam	7%		3%	7%	8%	5%	5%	13%		
Hilton Guam Resort	6%		9%	15%	4%	5%	8%			
Fiesta Resort Guam	5%		6%	5%	6%	5%	13%	6%		
Outrigger Guam Resort	5%		3%	5%	4%	5%	13%	6%		
Pacific Bay Hotel	3%	9%	3%	2%	8%	2%	3%			
Bayview Hotel	3%	9%	6%	5%	2%	5%				
Sheraton Laguna Guam	3%	9%		2%	2%	7%		3%		
Holiday Resort Guam	3%	4%		5%	4%	2%	3%	3%		
Hyatt Regency Guam	3%			3%	9%		3%			
Leo Palace Resort	3%			3%	4%	4%	3%	3%		
Condo	2%		6%	3%			3%	3%		
Onward Beach Resort	2%			2%	2%	4%	3%			
Royal Orchid Guam	1%	4%	3%	2%						
Other	1%				4%					
Tumon Bay Capital Hotel	0%				2%					
Home stay/ friend/ relative	0%									
Guam Marriott Resort	0%									
Total	Count	351	23	34	61	53	55	38	32	6



# 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	58%	64%	57%	56%	48%	57%	58%	
	Pleasure	50%	58%	46%	49%	45%	44%	57%	
	Short travel time	47%	36%	50%	52%	58%	45%	49%	
	Shopping	39%	46%	41%	39%	12%	31%	47%	
	Relax	35%	29%	36%	42%	33%	37%	32%	
	Price	28%	35%	26%	25%	18%	32%	24%	
	Previous trip	28%	11%	24%	56%	33%	32%	23%	
	Water sports	25%	29%	25%	25%	18%	24%	26%	
	Recomm- friend/family/trvl agnt	25%	34%	23%	17%	27%	22%	29%	
	Safe	17%	13%	14%	25%	27%	18%	16%	
	Married/ Attn wedding	7%	3%	12%	4%	9%	9%	5%	
	Scuba	7%	8%	8%	5%	3%	7%	7%	
	Honeymoon	6%		12%	8%		12%		
	Company/ Business Trip	4%	5%	5%	3%		3%	5%	
	Other	4%	4%	2%	6%	6%	3%	4%	
	Organized sports	3%	3%	3%	5%		4%	2%	
	Golf	3%	1%	1%	6%	12%	5%	1%	
	Visit friends/ Relatives	3%	1%	5%	3%	3%	1%	5%	
	Company Sponsored	1%	2%	1%	1%		2%	1%	
	Career Cert/ Testing	0%			1%		1%		
	Total	Count	351	107	128	77	33	180	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	58%	61%	53%	57%	48%	65%	63%	61%	50%	
Pleasure	50%	39%	50%	38%	50%	55%	66%	52%	67%	
Short travel time	47%	30%	47%	43%	48%	56%	61%	42%	17%	
Shopping	39%	35%	47%	38%	38%	35%	47%	42%	33%	
Relax	35%	30%	18%	39%	35%	38%	50%	30%	17%	
Price	28%	43%	35%	18%	27%	27%	26%	33%	33%	
Previous trip	28%	9%	26%	30%	25%	36%	34%	33%	50%	
Water sports	25%	35%	15%	26%	21%	25%	26%	21%	67%	
Recomm- friend/family/trvl agnt	25%	22%	32%	16%	17%	27%	37%	21%	50%	
Safe	17%	13%	12%	20%	12%	16%	37%	21%	17%	
Married/ Attn wedding	7%		6%	10%	13%	4%	5%	9%		
Scuba	7%	17%	6%	5%	6%	5%	5%	9%	17%	
Honeymoon	6%			5%	15%	7%	3%	6%		
Company/ Business Trip	4%	13%	3%	5%	4%			3%	17%	
Other	4%		6%	7%	4%	2%	3%	9%		
Organized sports	3%	4%	3%	5%	2%		3%	3%		
Golf	3%			3%	4%	4%		9%	17%	
Visit friends/ Relatives	3%	9%	6%	3%	4%	4%				
Company Sponsored	1%	4%	3%				5%			
Career Cert/ Testing	0%									
Total	Count	351	23	34	61	52	55	38	33	6

# SECTION 3 **EXPENDITURES**

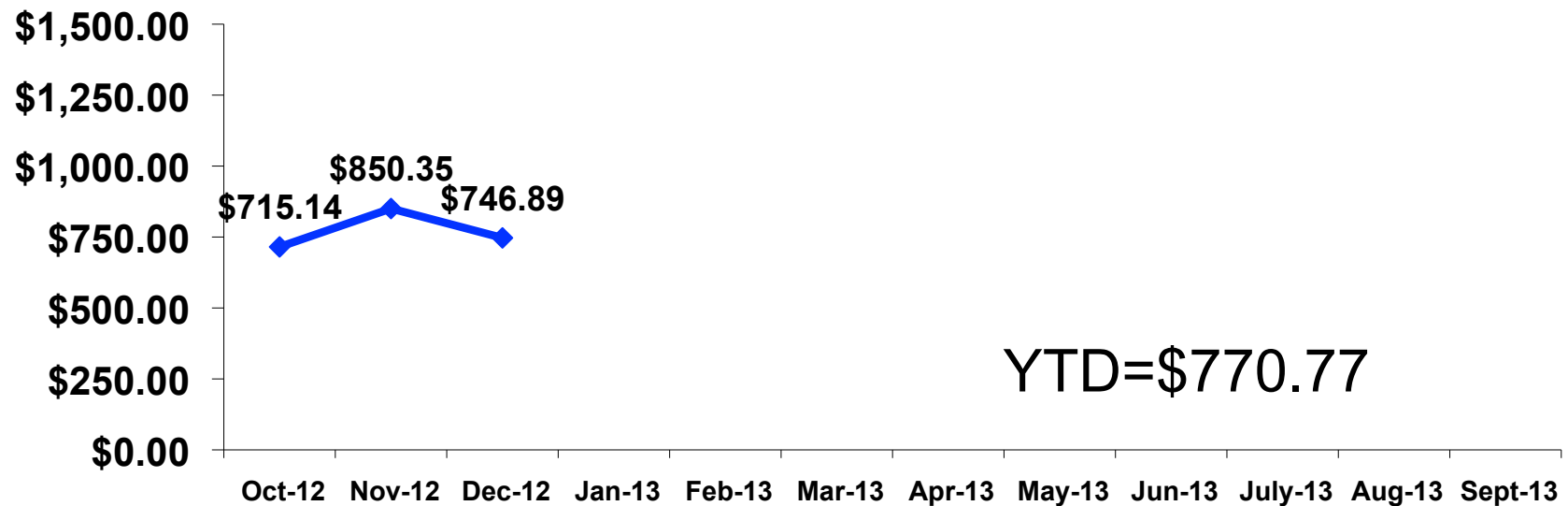
---

# Prepaid Expenditures

¥83.31/US\$1

- \$1,468.02 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$42,012 = maximum (highest amount recorded for the entire sample)
- \$746.89 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person



# Breakdown of Prepaid Expenditures

¥83.31=\$1

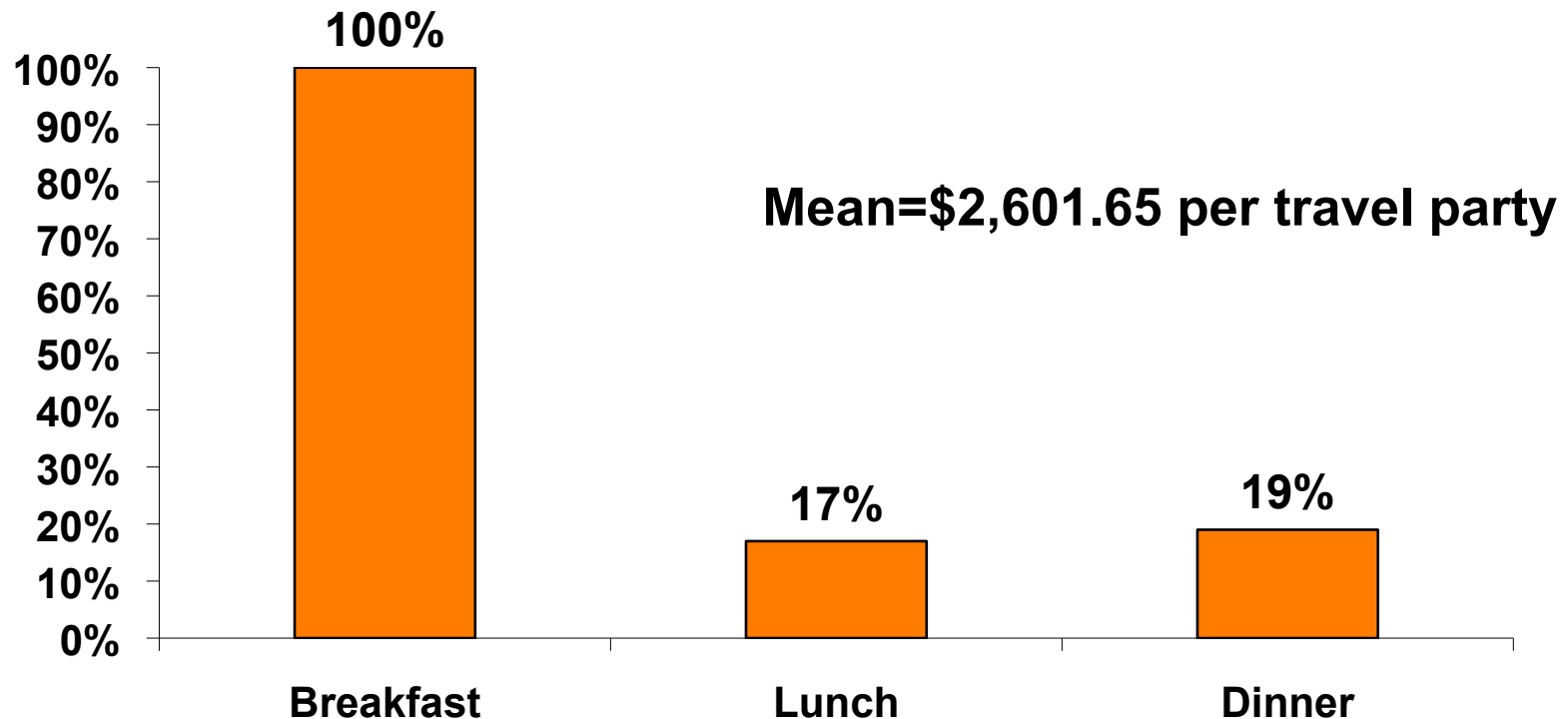
(Filter: Only those who responded/  
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,349.73
Air & Accommodation w/ daily meal package	\$2,601.65
Air only	\$1,014.28
Accommodation only	\$240.07
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$198.06
Ground transportation- Japan	\$56.32
Ground transportation- Guam	\$42.01
Optional tours/ activities	\$170.15
Other expenses	\$311.34
<b>Total Prepaid</b>	<b>\$1,468.02</b>



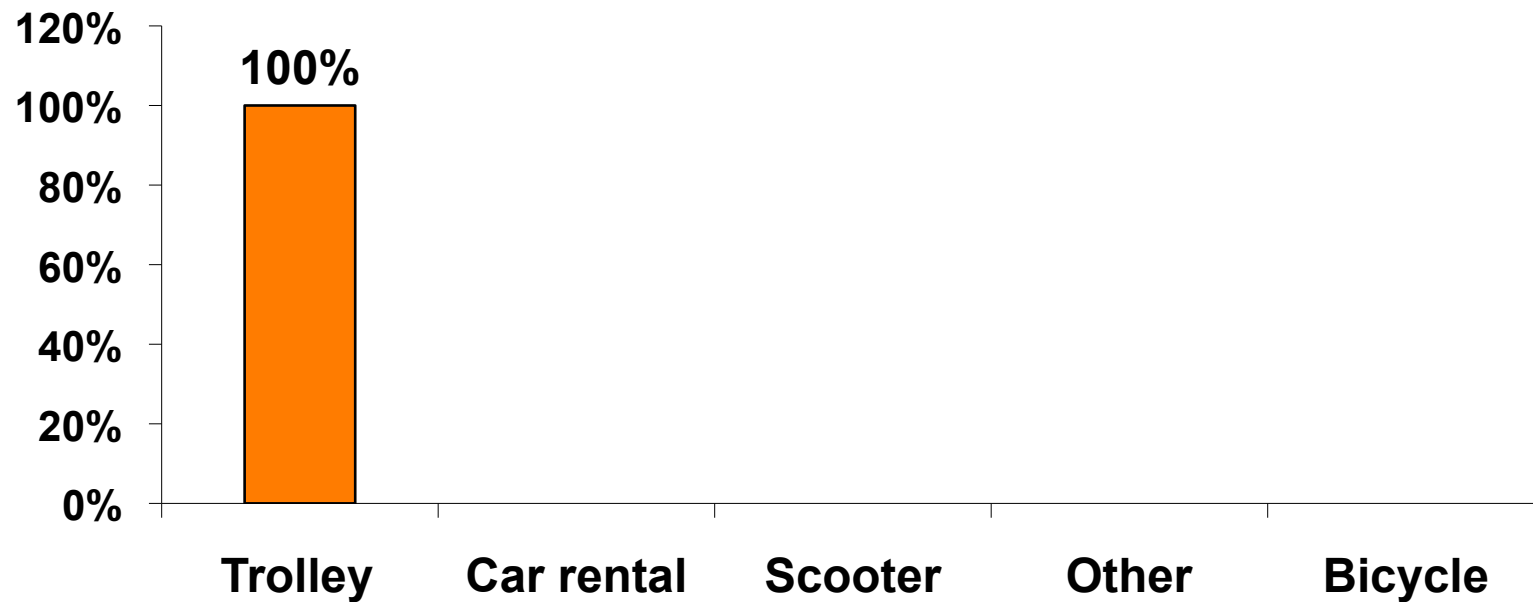
# Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package  
n=64



# Prepaid Ground Transportation

n=2

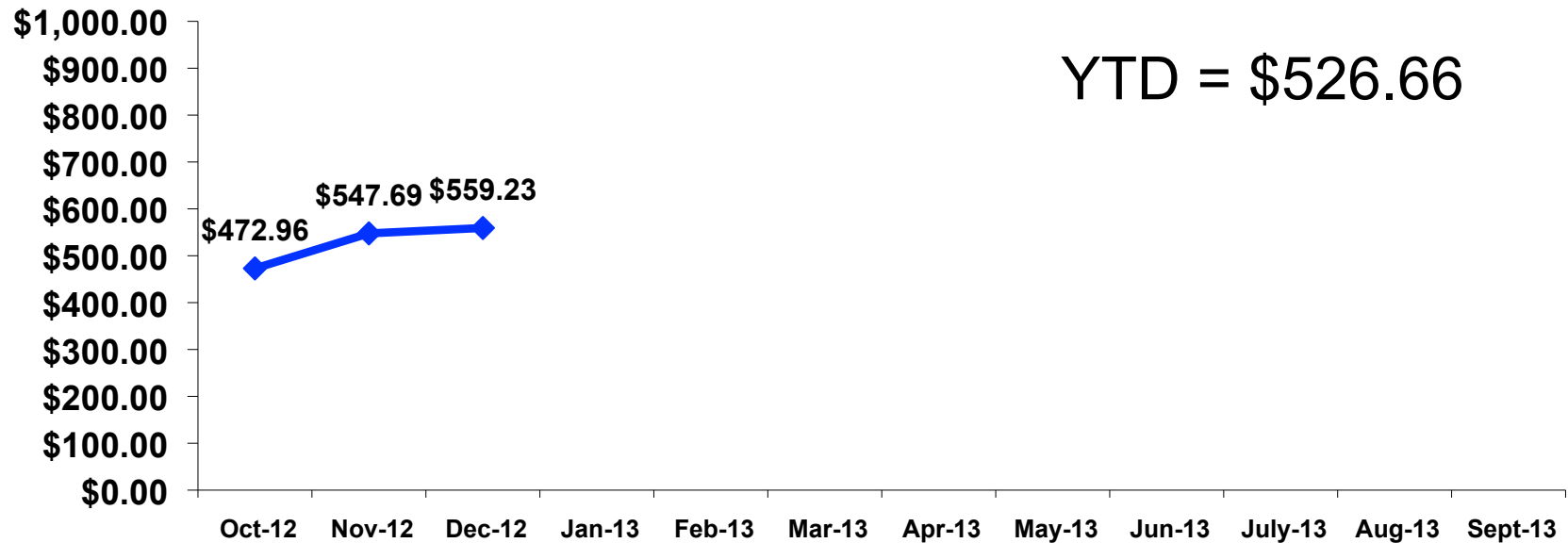


Mean=\$42.01 per travel party

# On-Island Expenditures

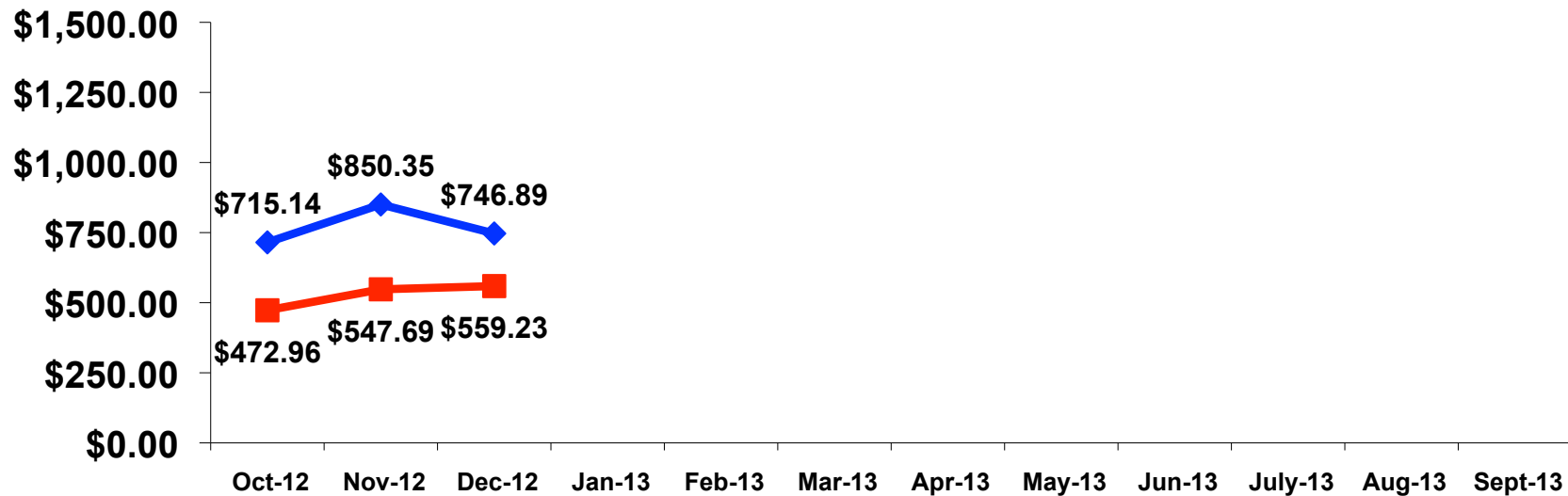
- \$831.31 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$12,000 = Maximum (highest amount recorded for the entire sample)
- \$559.23 = overall mean average per person on-island expenditure

# On-Island Expenditures Per Person



# Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$770.77 On-Island YTD = \$526.66



# Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
					AGE				AGE			
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$559.23	\$510.32	\$610.41	\$373.63	\$674.87	\$508.34	\$420.01	\$444.05	\$657.88	\$708.40	\$957.95
	Median	\$400	\$350	\$447	\$350	\$351	\$350	\$360	\$390	\$500	\$500	\$600
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$55	\$0
	Maximum	\$6,000	\$6,000	\$4,000	\$1,510	\$6,000	\$2,500	\$1,500	\$1,700	\$2,012	\$3,610	\$4,000

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$26.30	\$34.03	\$18.26	\$5.22	\$21.74	\$51.83	\$57.45
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$30.09	\$33.69	\$26.35	\$23.17	\$33.59	\$39.42	\$21.09
	Median	\$7	\$10	\$6	\$10	\$0	\$28	\$0
F&B RESTRNT	Mean	\$71.40	\$89.80	\$52.26	\$39.60	\$66.62	\$127.54	\$75.61
	Median	\$10	\$8	\$14	\$14	\$0	\$50	\$0
OPT TOUR	Mean	\$90.93	\$118.93	\$61.80	\$54.38	\$76.18	\$177.62	\$77.12
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$253.01	\$321.68	\$181.55	\$93.10	\$417.47	\$243.16	\$201.09
	Median	\$46	\$40	\$50	\$48	\$30	\$100	\$0
GIFT- OTHER	Mean	\$122.52	\$130.61	\$114.10	\$74.86	\$136.22	\$167.95	\$133.97
	Median	\$50	\$50	\$50	\$50	\$26	\$100	\$60
TRANS	Mean	\$12.29	\$12.51	\$12.05	\$9.18	\$11.96	\$20.74	\$6.06
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$224.70	\$229.60	\$219.59	\$121.74	\$243.44	\$254.00	\$404.58
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$831.31	\$967.14	\$689.16	\$425.79	\$1,022.07	\$1,048.19	\$976.97
	Median	\$500	\$563	\$500	\$368	\$600	\$880	\$600

# On-Island Expenditures

## First Timers & Repeaters

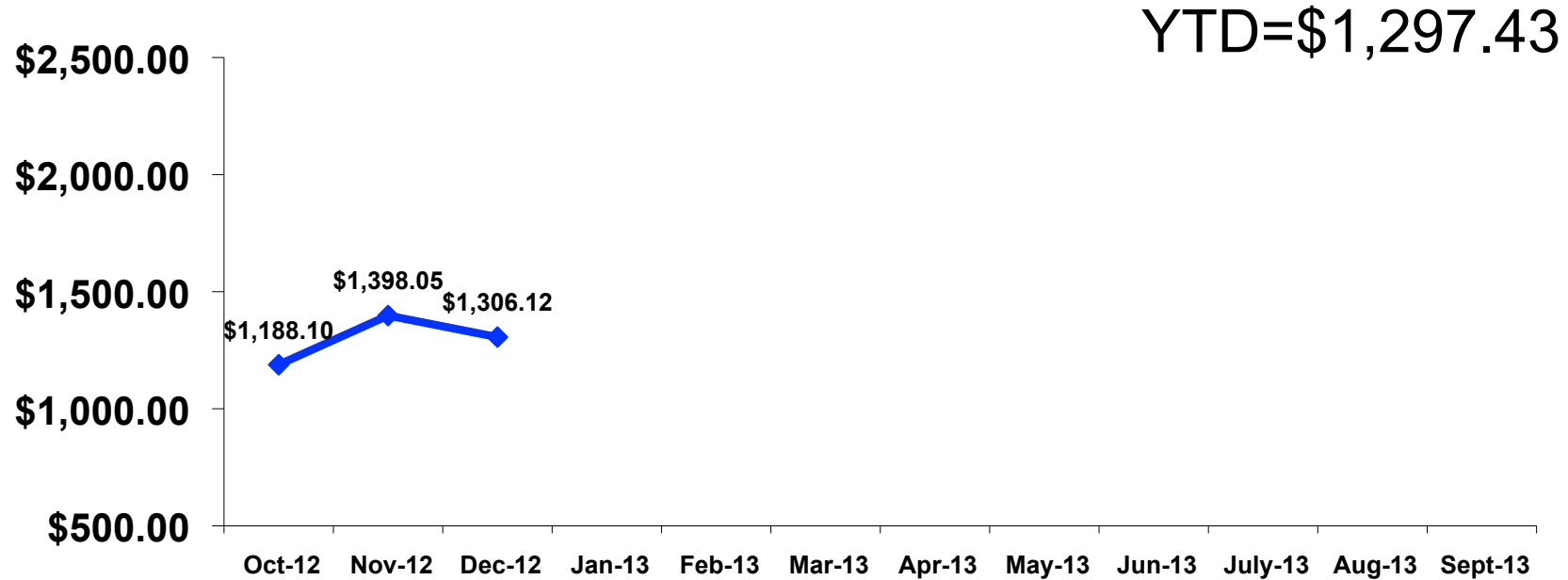
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$26.30	\$24.63	\$28.69
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$30.09	\$30.76	\$29.34
	Median	\$7	\$10	\$0
F&B RESTRNT	Mean	\$71.40	\$64.04	\$84.38
	Median	\$10	\$10	\$0
OPT TOUR	Mean	\$90.93	\$80.93	\$109.83
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$253.01	\$200.91	\$325.27
	Median	\$46	\$42	\$50
GIFT- OTHER	Mean	\$122.52	\$109.17	\$145.39
	Median	\$50	\$50	\$50
TRANS	Mean	\$12.29	\$10.43	\$15.62
	Median	\$0	\$0	\$0
OTHER	Mean	\$224.70	\$158.80	\$315.02
	Median	\$0	\$0	\$0
TOTAL	Mean	\$831.31	\$687.78	\$1,041.39
	Median	\$500	\$450	\$665



# Total Expenditures Per Person (Prepaid & On-Island)

- \$1,306.12 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,900 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures Per Person



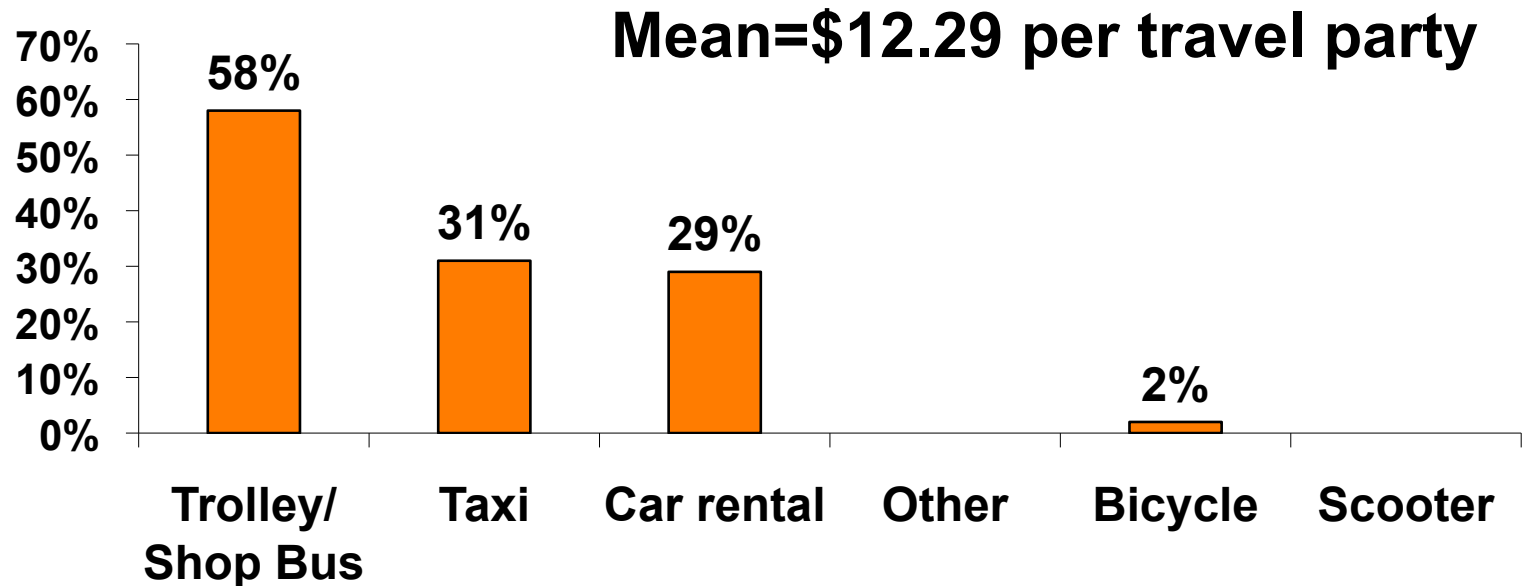
---

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$26.30
Food & beverage in fast food restaurant/ convenience store	\$30.09
Food & beverage at restaurants or drinking establishments outside a hotel	\$71.40
Optional tours and activities	\$90.93
Gifts/ souvenirs for yourself/companions	\$253.01
Gifts/ souvenirs for friends/family at home	\$122.52
Local transportation	\$12.29
Other expenses not covered	\$224.70
<b>Average Total</b>	<b>\$831.31</b>

# Local Transportation

n=48



# Guam Airport Expenditures

- \$28.79 = Mean
- \$3 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,000 = Maximum (highest amount recorded for the entire sample)

---

# Breakdown of Airport Expenditures

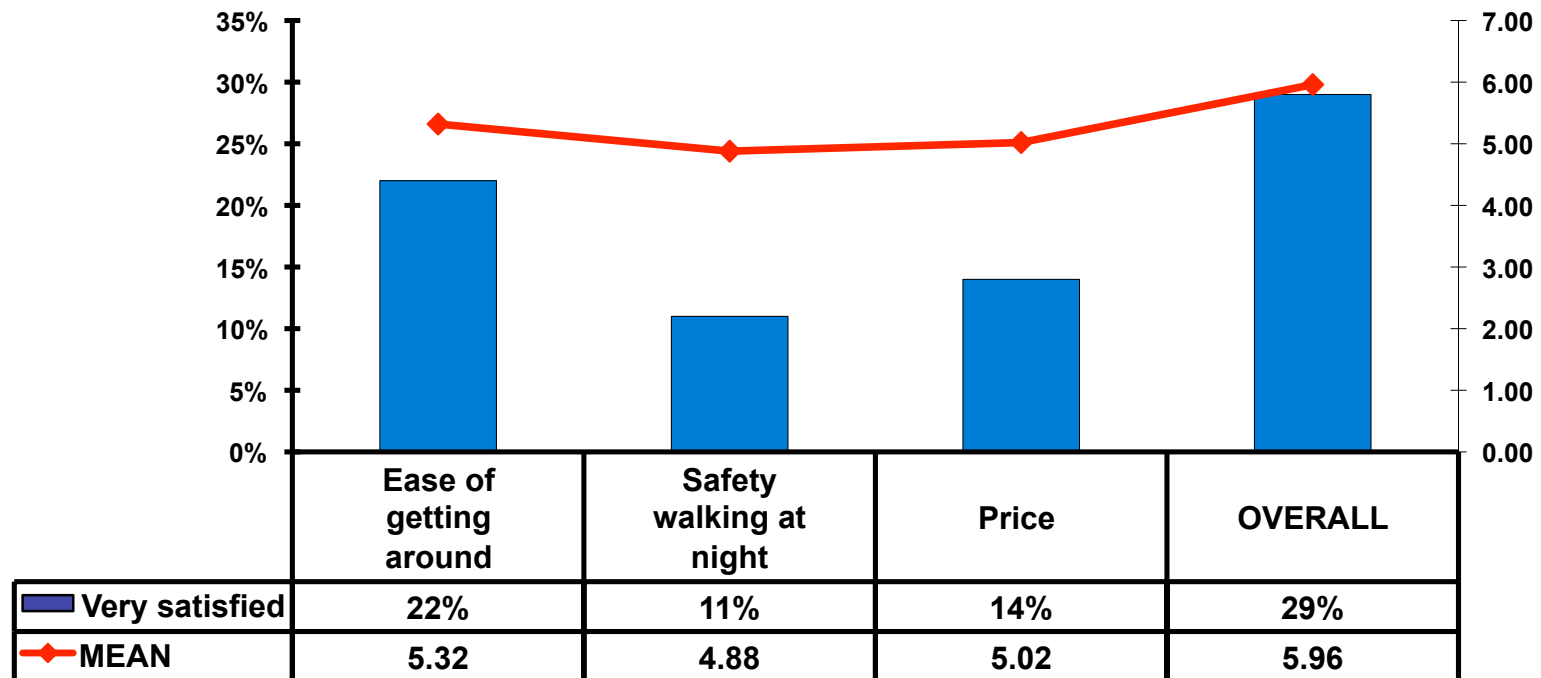
	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	<b>\$6.68</b>
<b>Gifts/Souvenirs Self</b>	<b>\$8.22</b>
<b>Gifts/Souvenirs Others</b>	<b>\$13.91</b>
<b>Total</b>	<b>\$28.79</b>

# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied

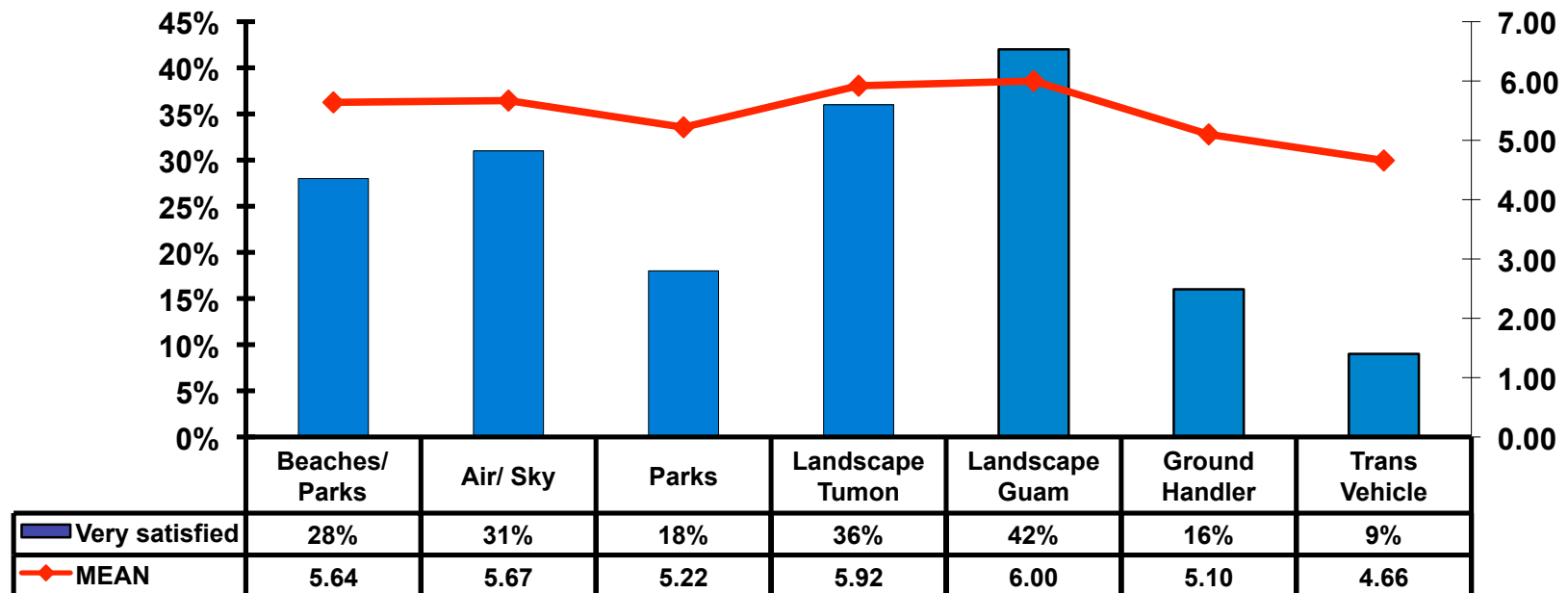




# Satisfaction Quality/ Cleanliness

7pt Rating Scale

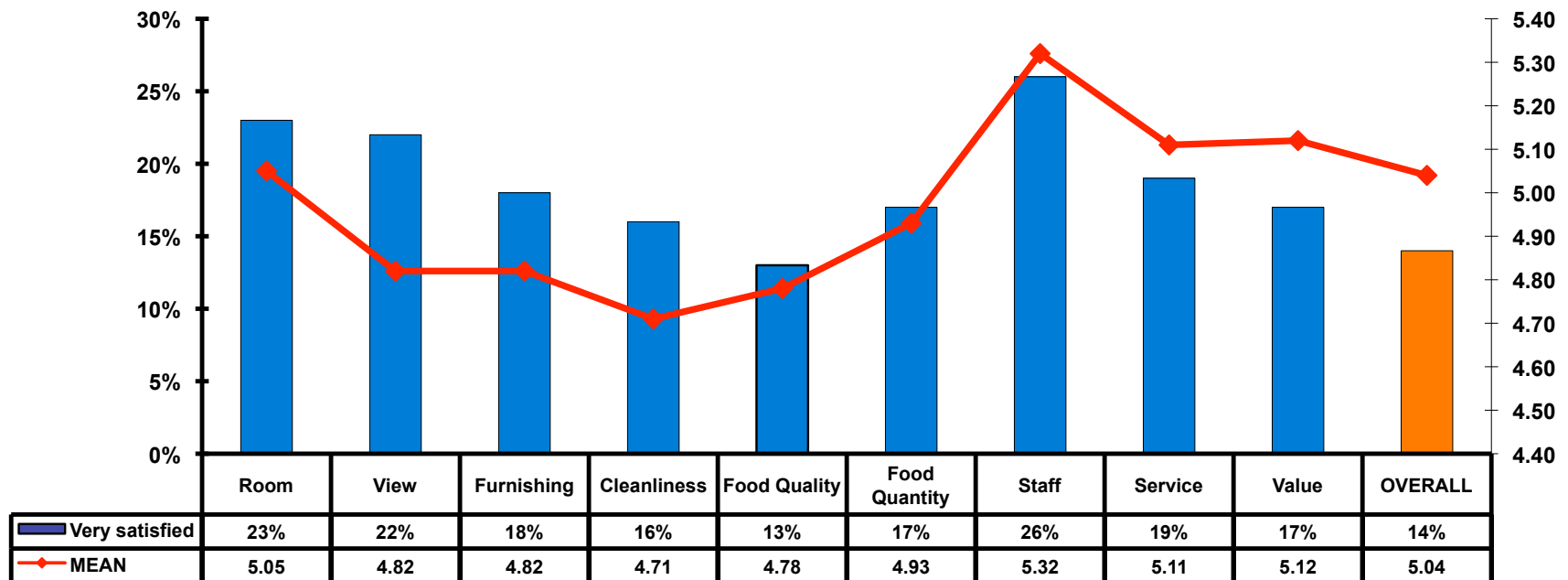
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

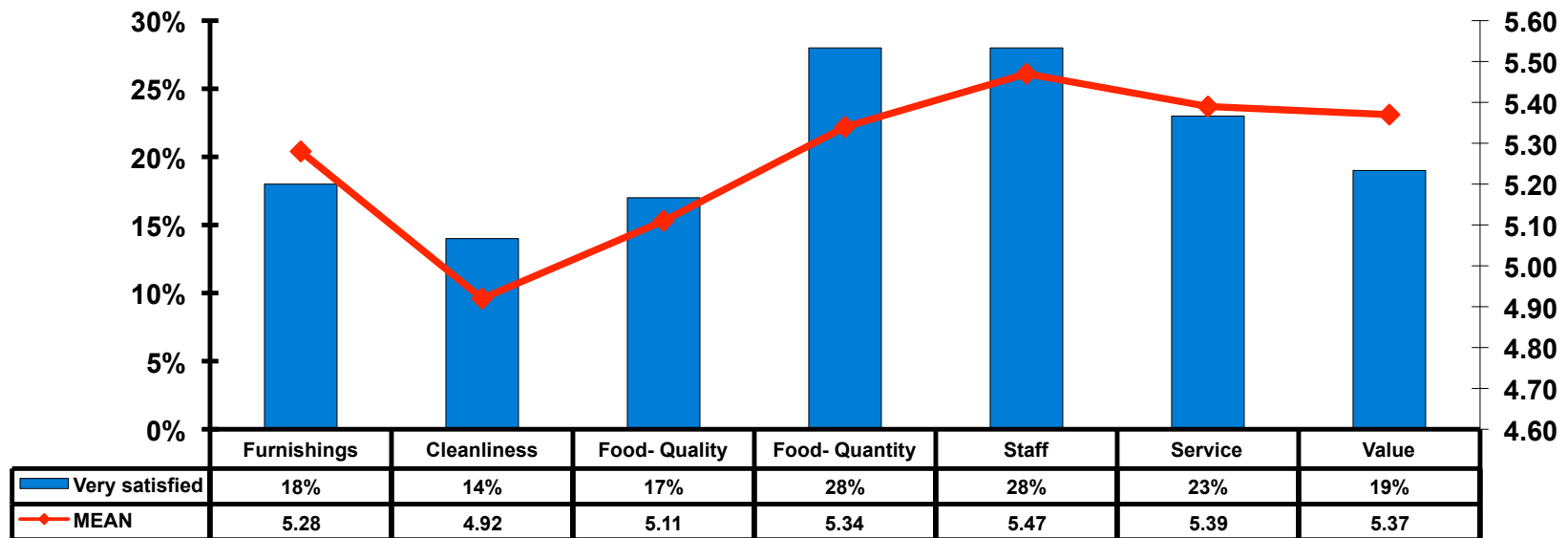
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

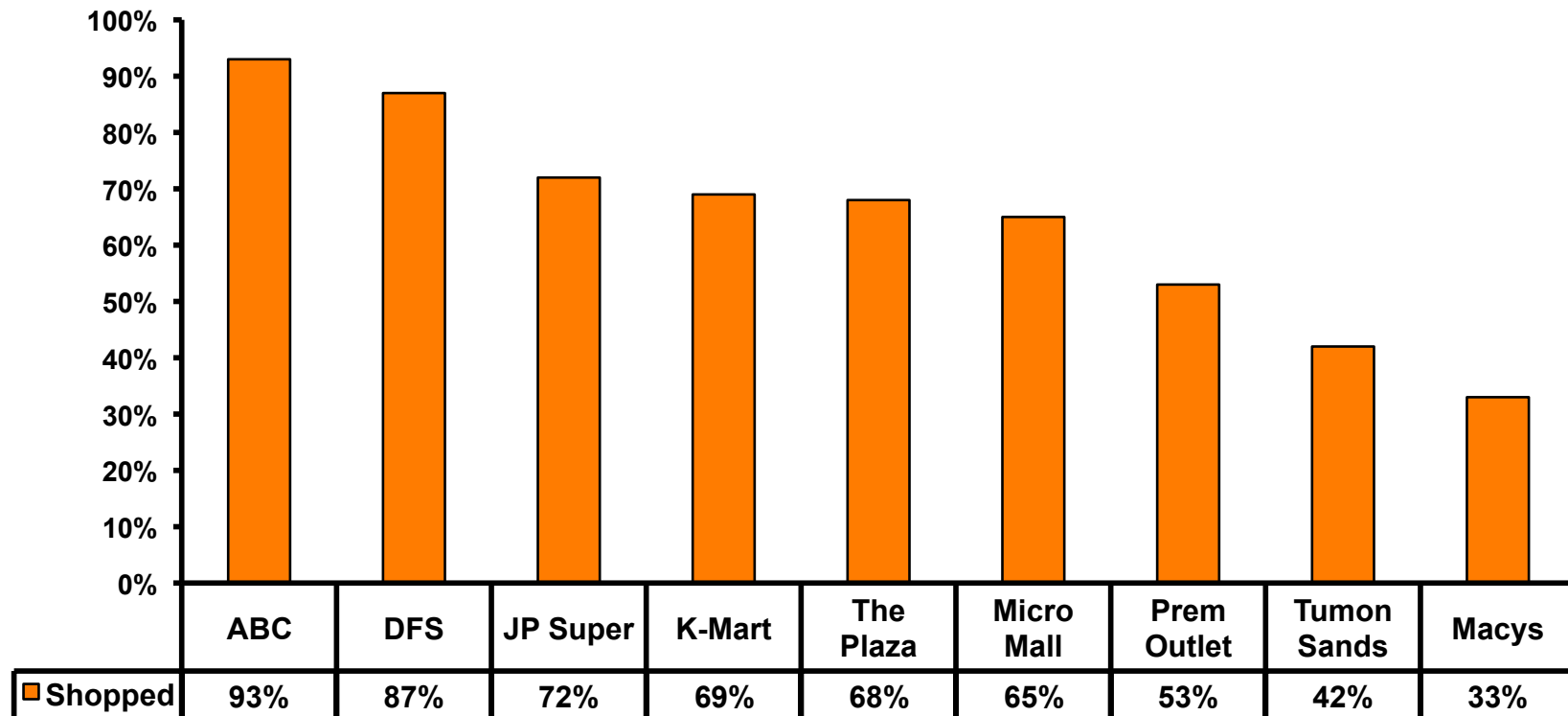
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

7pt Rating Scale

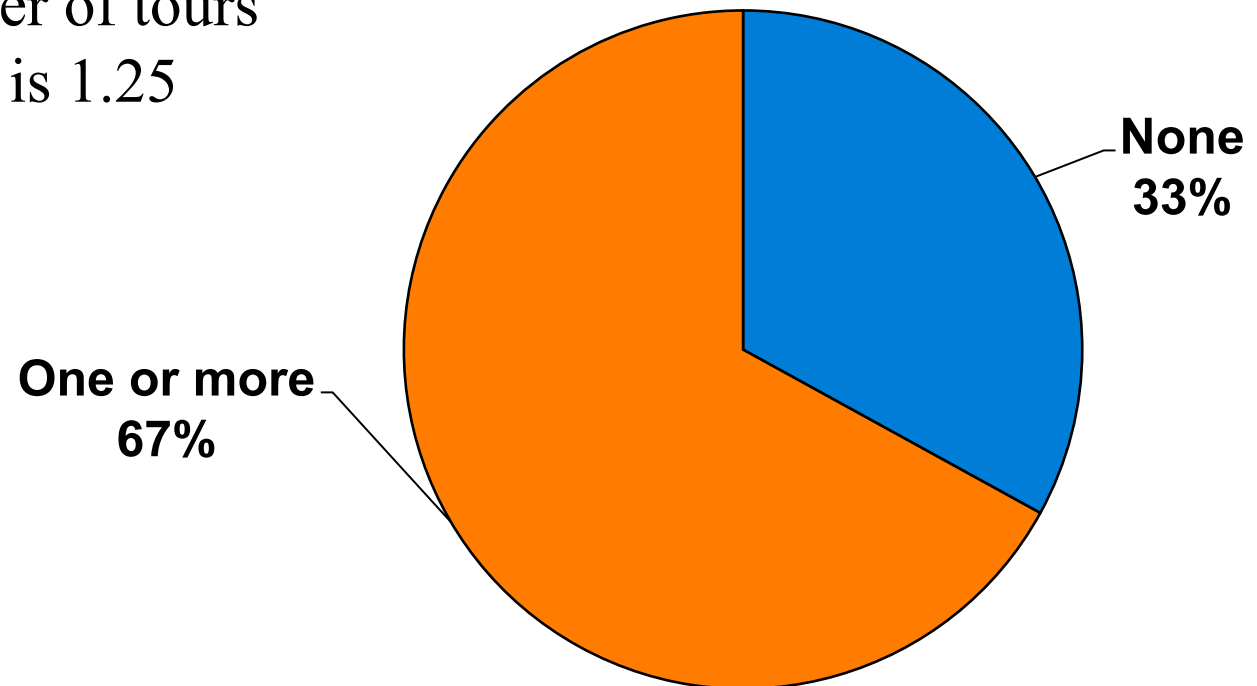
7=Very Satisfied/ 1=Very Dissatisfied

<b>Quality of Shopping</b>	<b>Variety of Shopping</b>
Score of 6 to 7 = <b>57%</b>	Score of 6 to 7 = <b>58%</b>
Score of 4 to 5 = <b>38%</b>	Score of 4 to 5 = <b>38%</b>
Score 1 to 3 = <b>4%</b>	Score 1 to 3 = <b>4%</b>
<b>MEAN = 5.52</b>	<b>MEAN = 5.50</b>

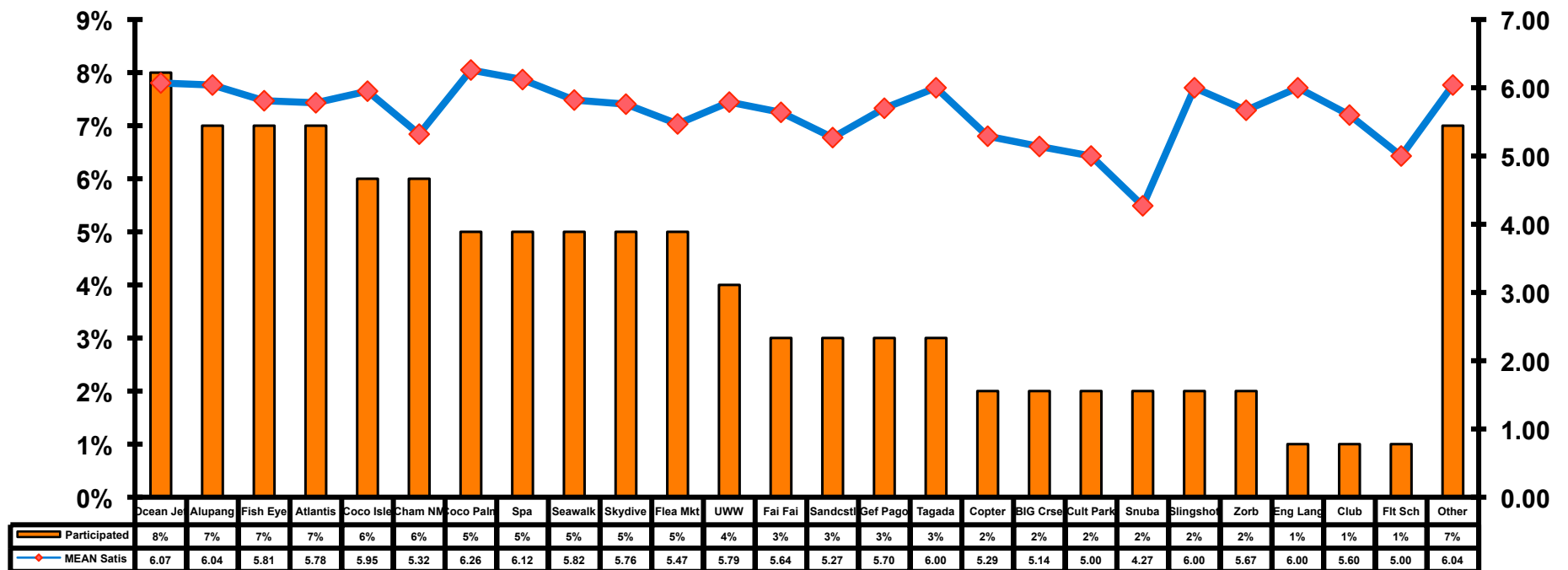
---

# Optional Tour Participation

- Average number of tours participated in is 1.25



# Optional Tours Participation & Satisfaction



# Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

<b>Quality of Day Tour</b>	<b>Variety of Day Tour</b>
Score of 6 to 7 = <b>60%</b>	Score of 6 to 7 = <b>56%</b>
Score of 4 to 5 = <b>37%</b>	Score of 4 to 5 = <b>43%</b>
Score 1 to 3 = <b>3%</b>	Score 1 to 3 = <b>2%</b>
<b>MEAN = 5.58</b>	<b>MEAN = 5.50</b>



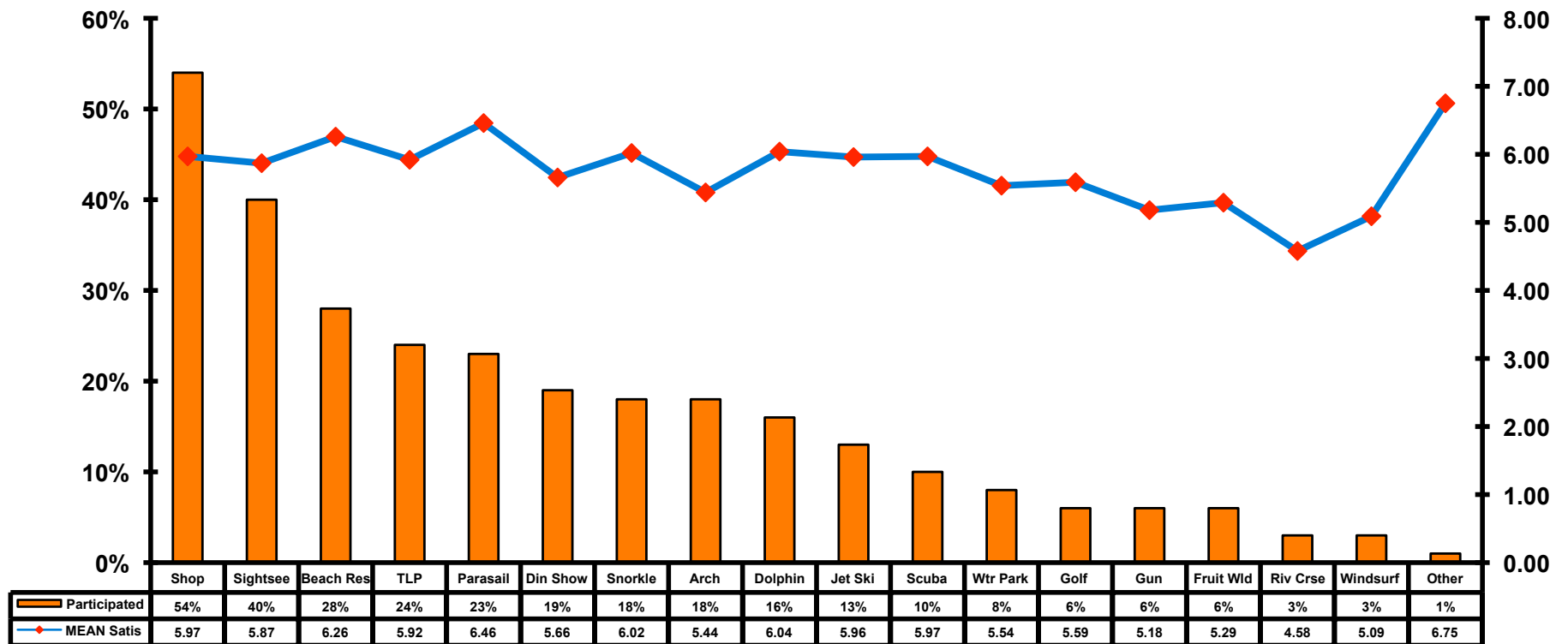
# Night Tours Satisfaction

7pt Rating Scale

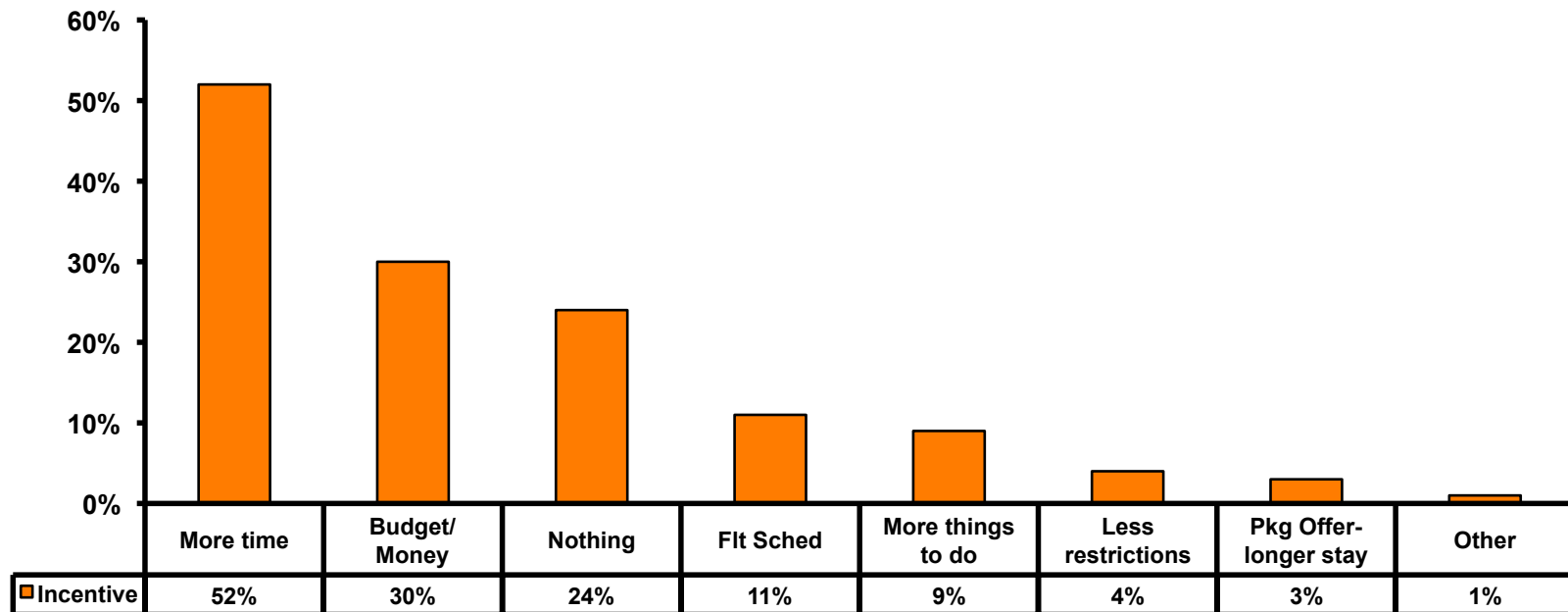
7=Very Satisfied/ 1=Very Dissatisfied

<b>Quality of Night Tour</b>	<b>Variety of Night Tour</b>
Score of 6 to 7 = <b>31%</b>	Score of 6 to 7 = <b>30%</b>
Score of 4 to 5 = <b>65%</b>	Score of 4 to 5 = <b>67%</b>
Score 1 to 3 = <b>4%</b>	Score 1 to 3 = <b>3%</b>
<b>MEAN = 4.80</b>	<b>MEAN = 4.79</b>

# Satisfaction with Other Activities



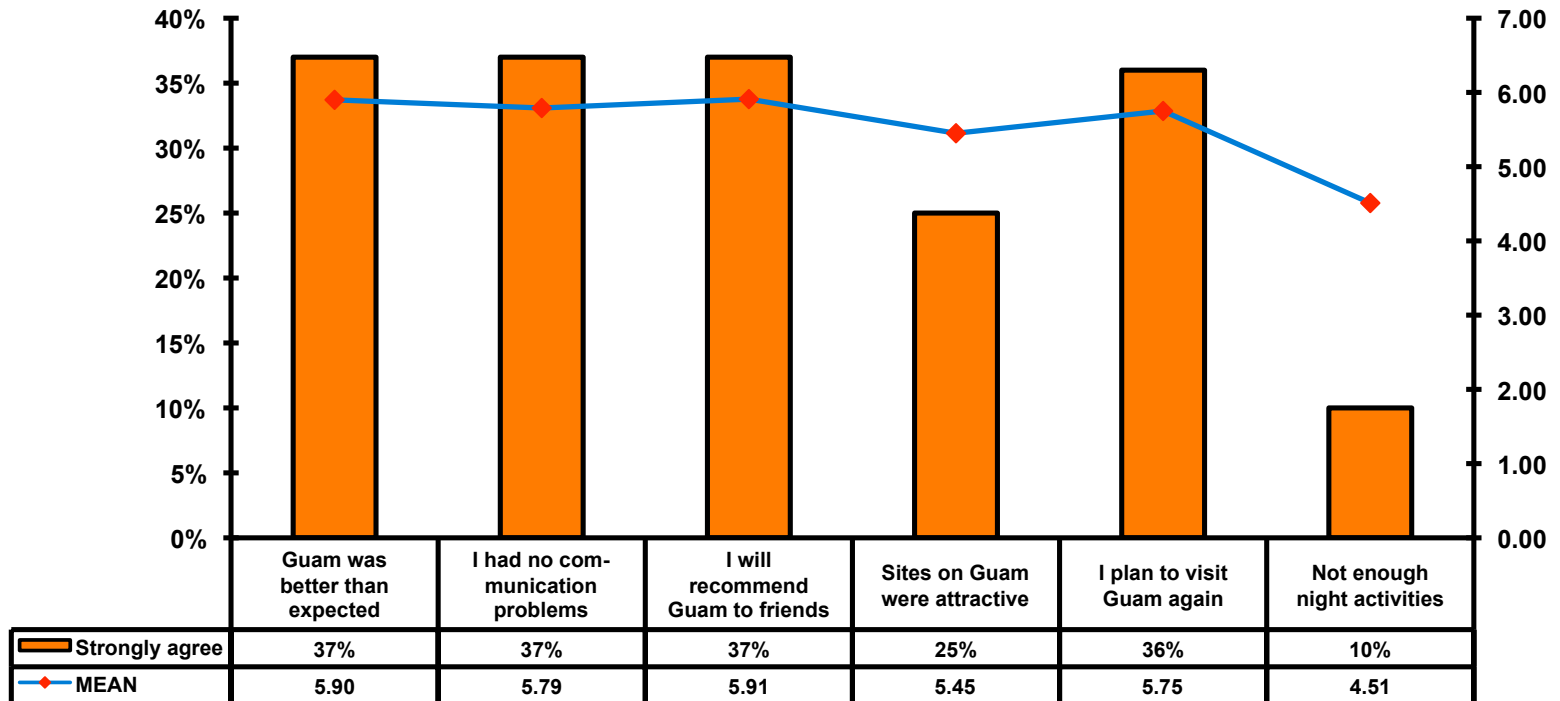
# What would it take to make you want to stay an extra day in Guam?



# On-Island Perceptions

7pt Rating Scale

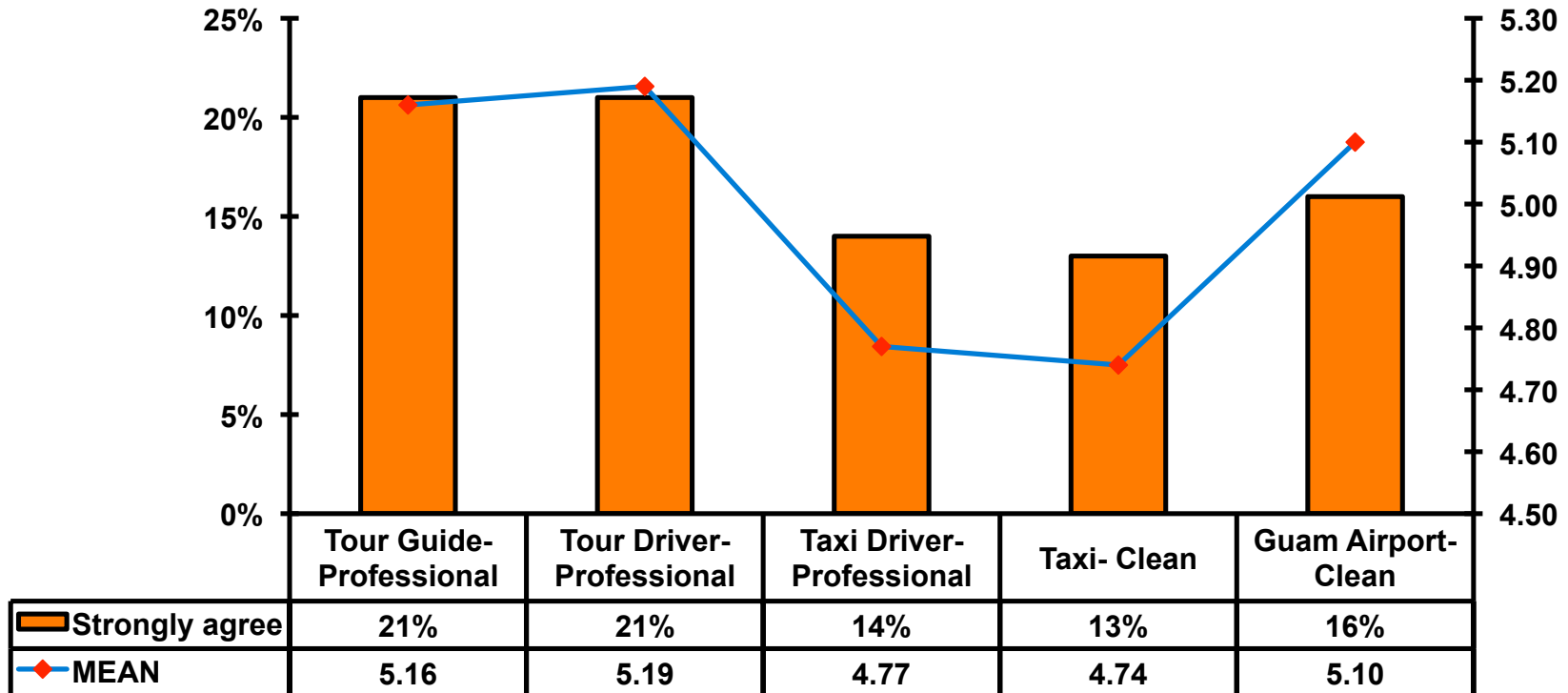
7=Very Satisfied/ 1=Very Dissatisfied



# On-Island Perceptions

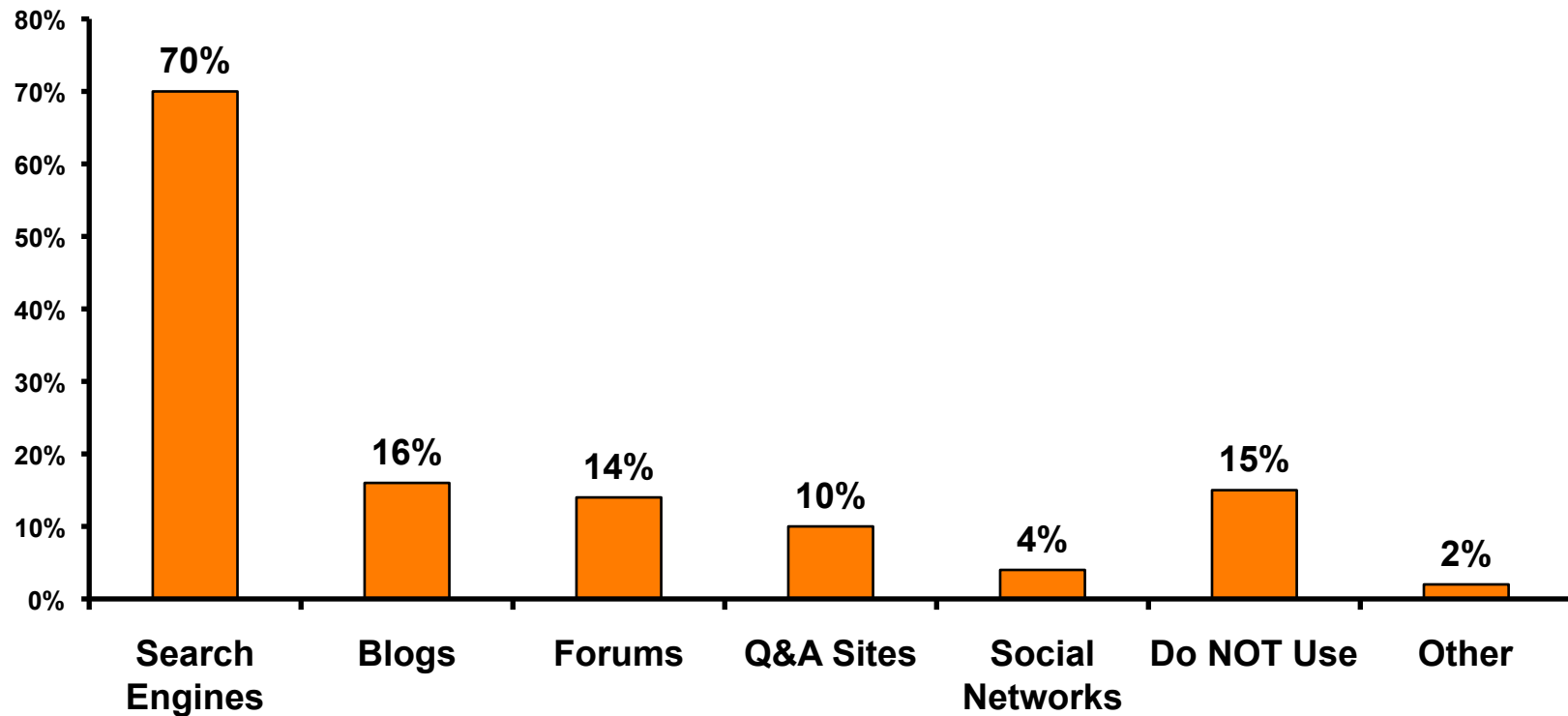
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



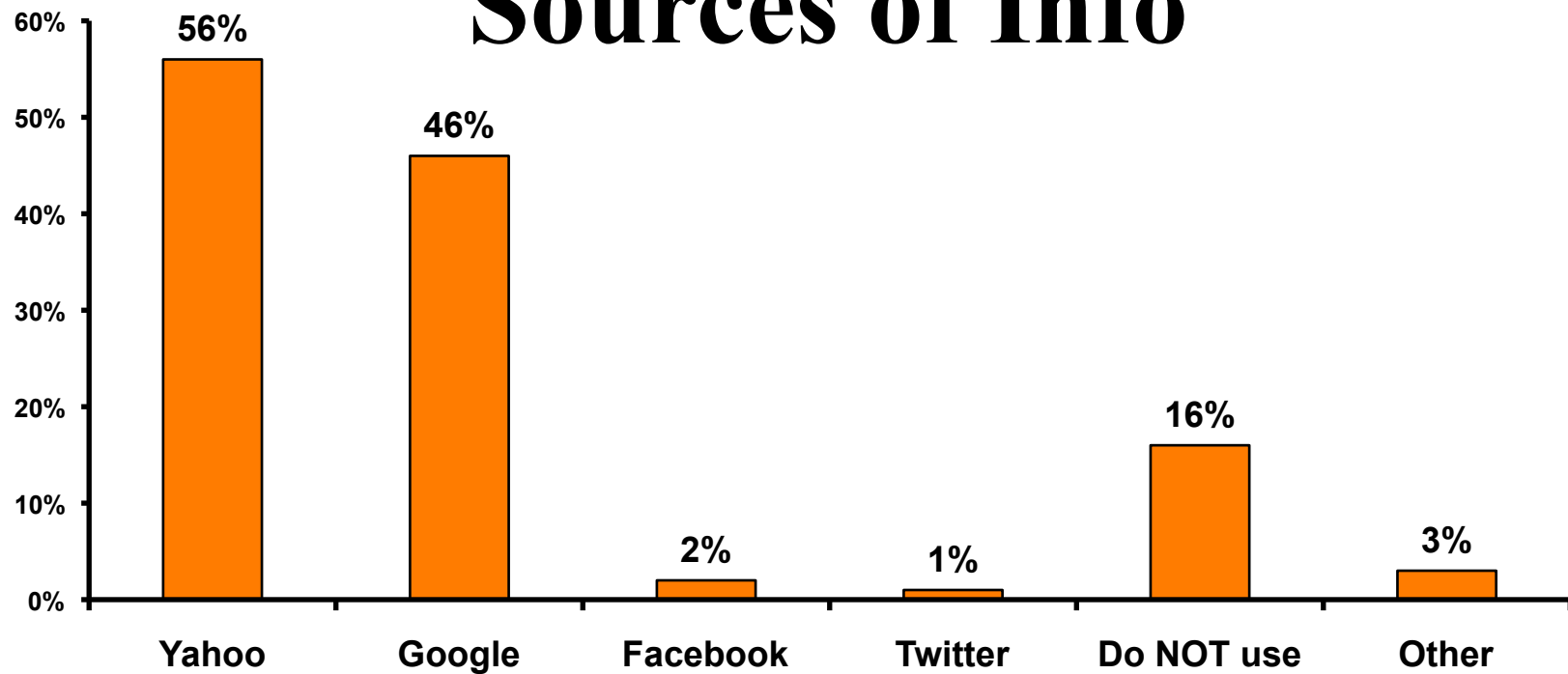
# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info



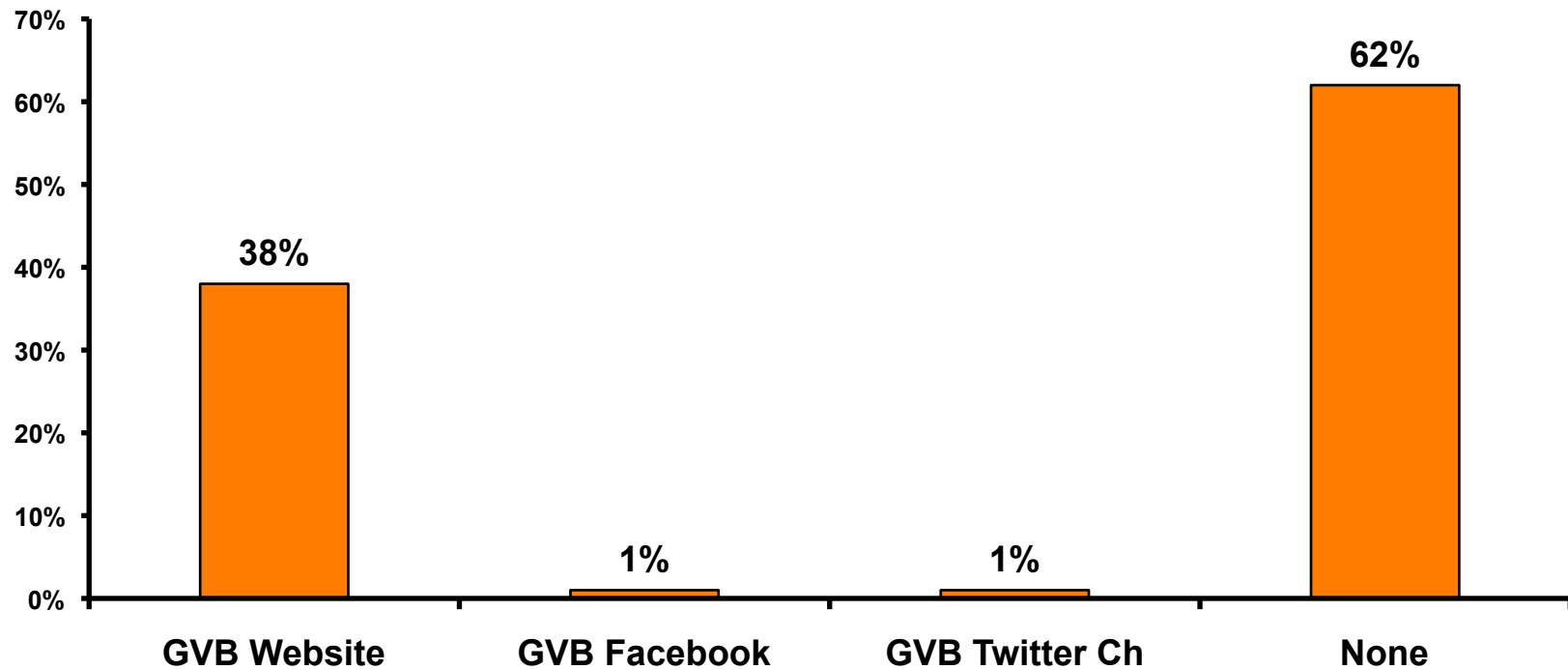
# Internet- Things To Do

## Sources of Info

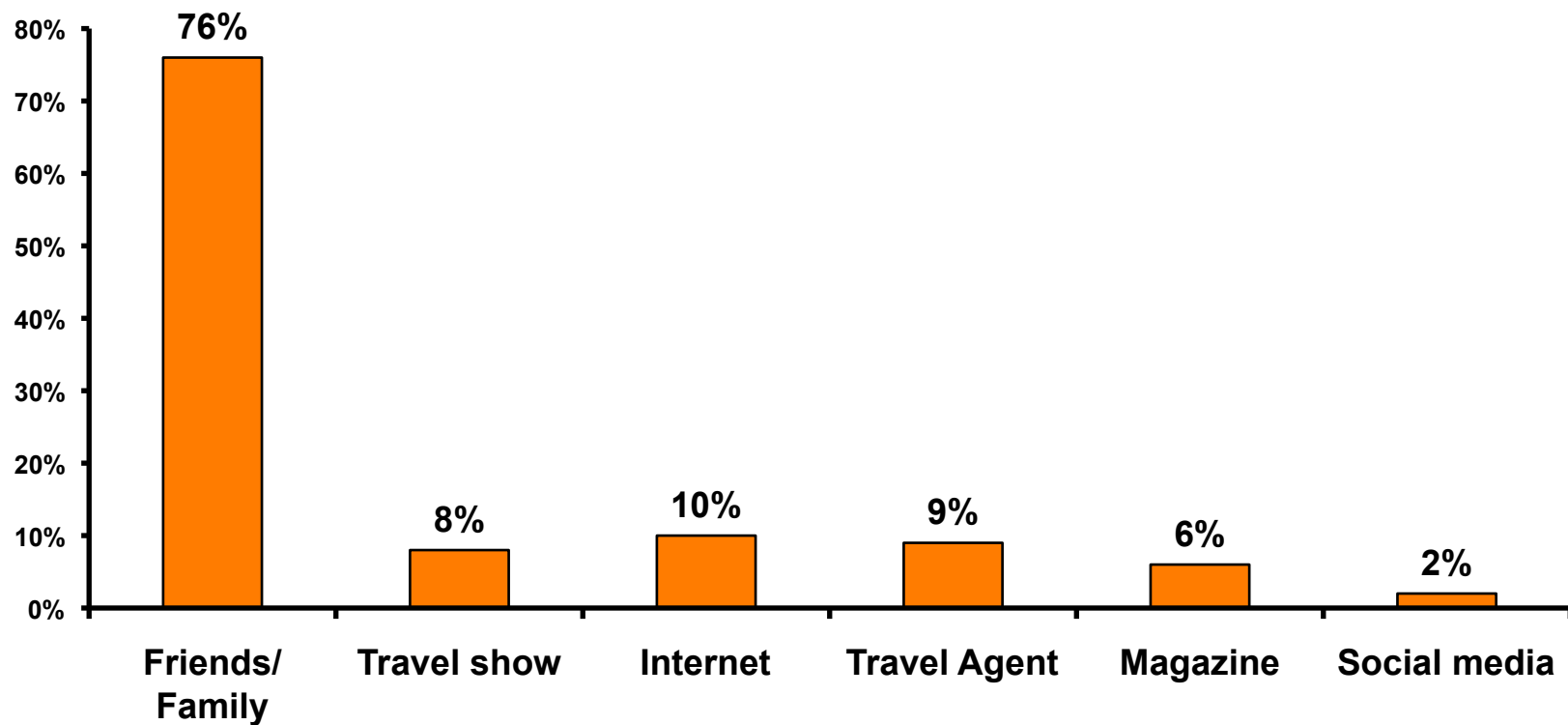




# Internet- GVB Sources

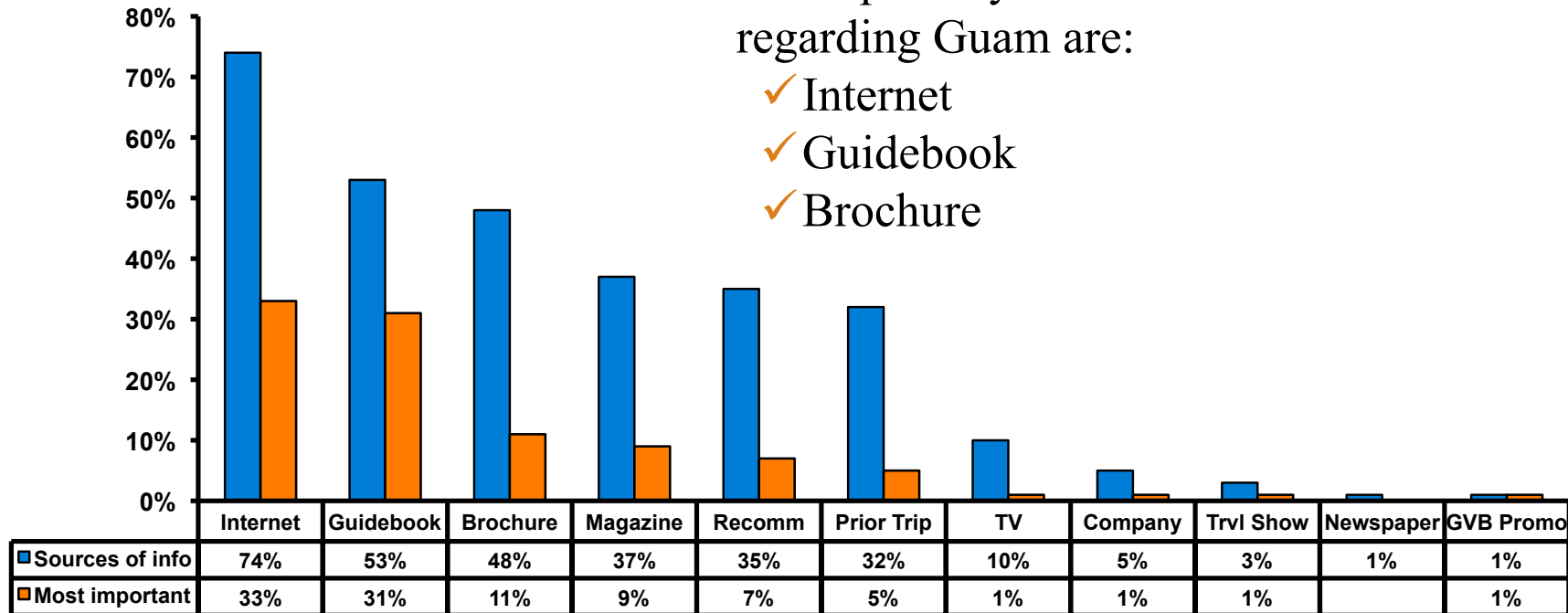


# Travel Motivation- Info Sources



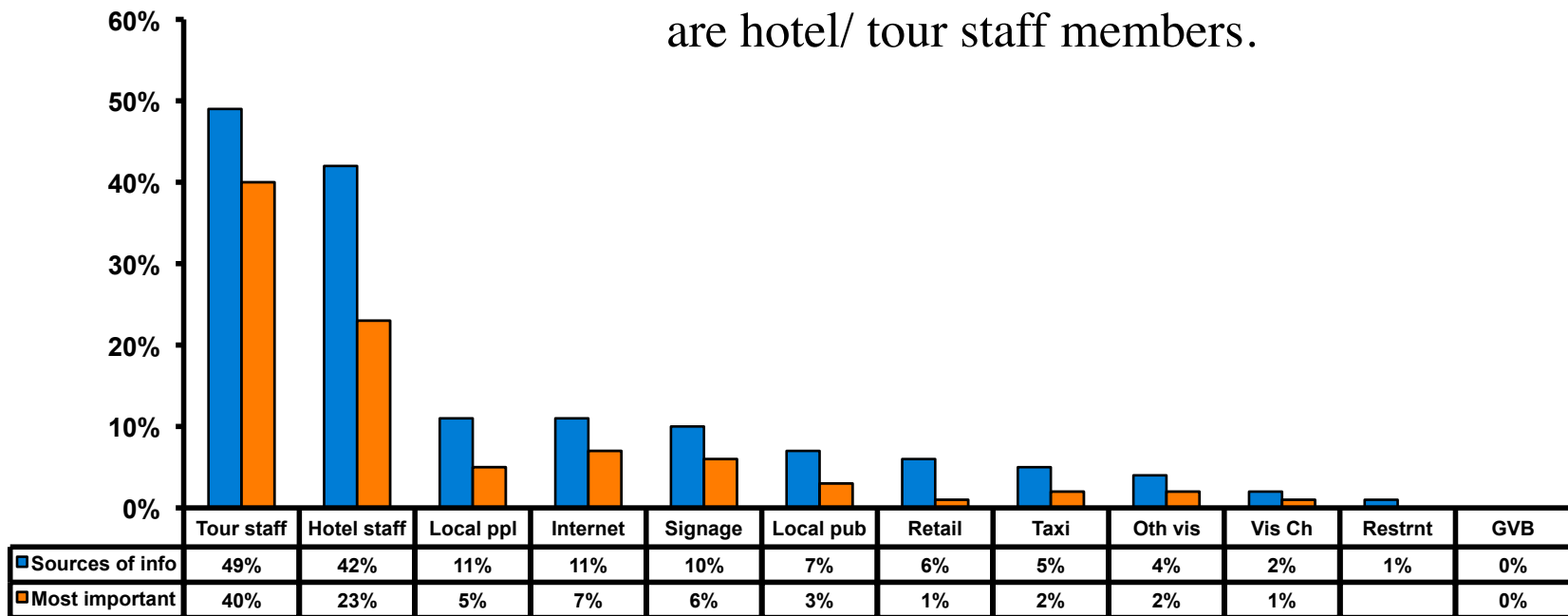
# Sources of Information Pre-arrival

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



# Sources of Information Post-arrival

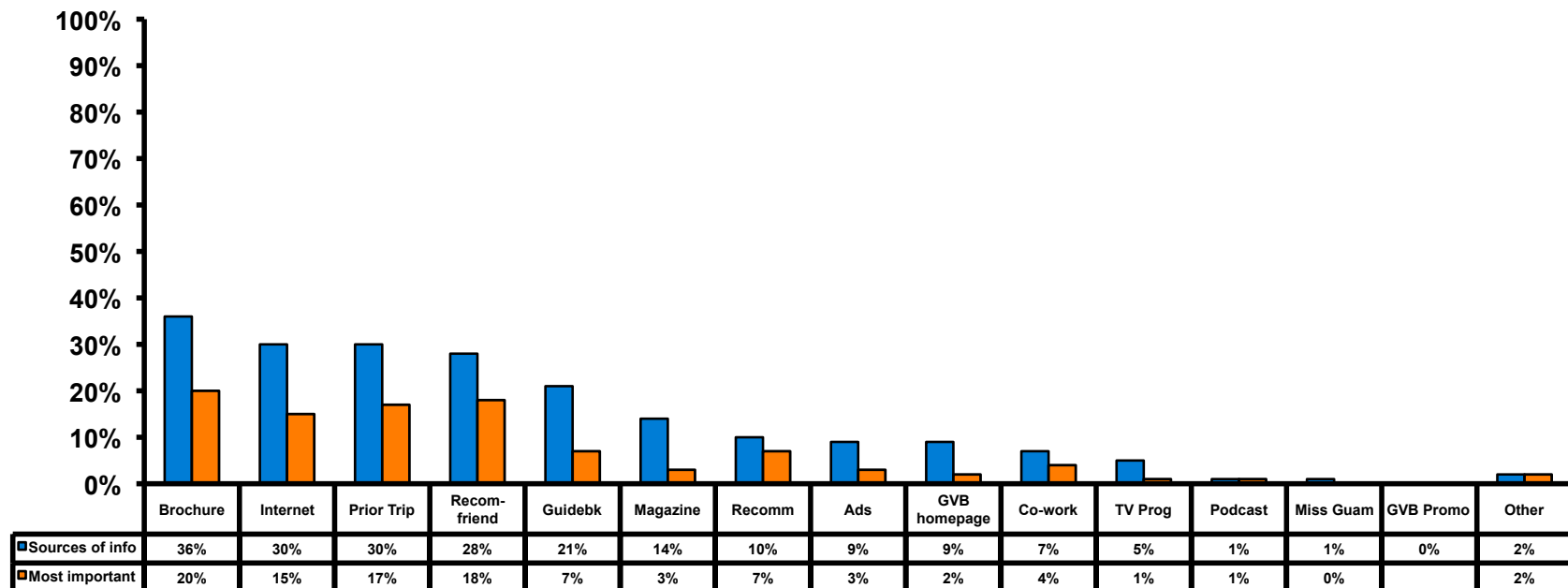
- The primary local source of information are hotel/ tour staff members.



# Sources of Information - Motivation

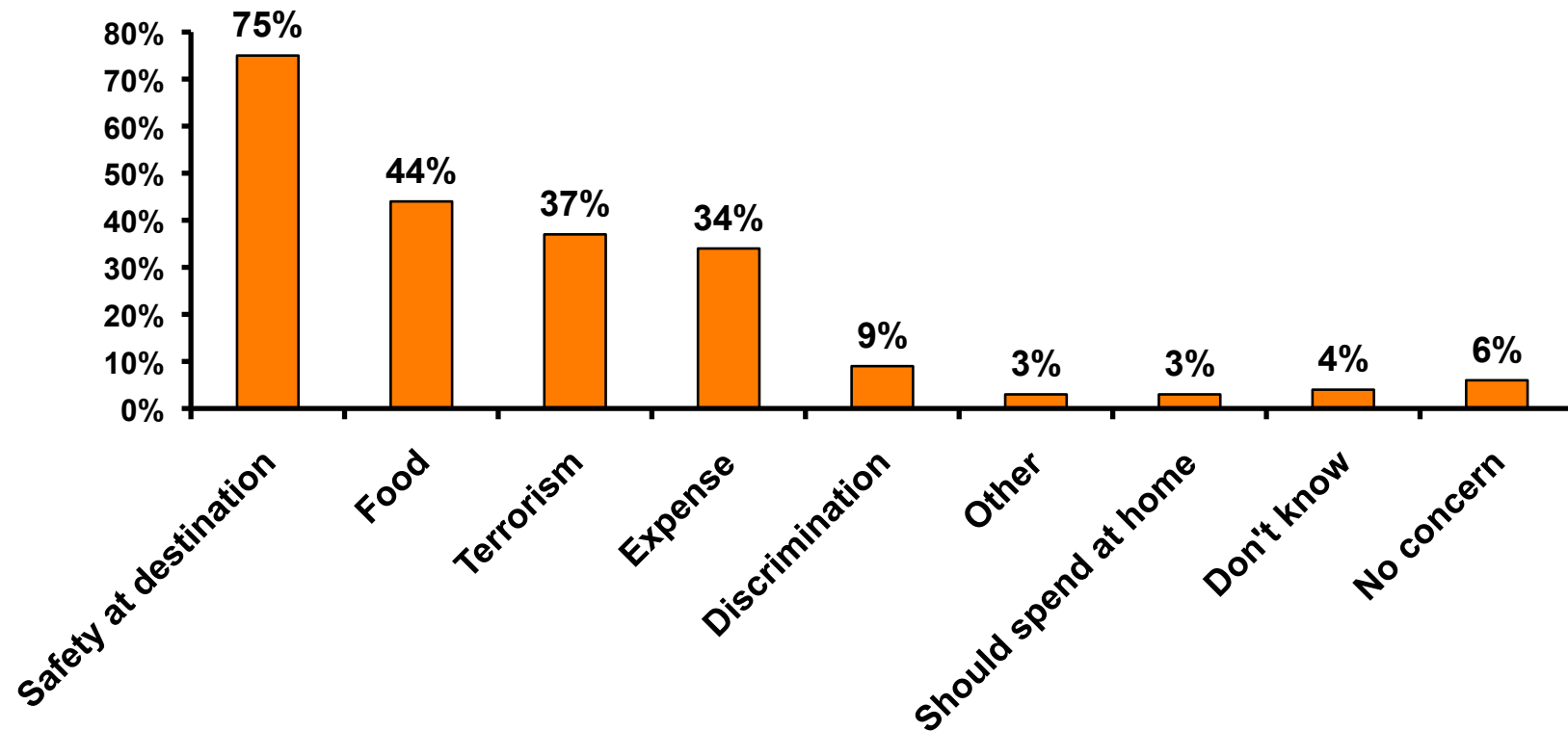
The primary motivational sources of information were.

- Brochures, the Internet and prior experience



SECTION 6  
**OTHER ISSUES**

# Concerns about travel outside of Japan - Overall

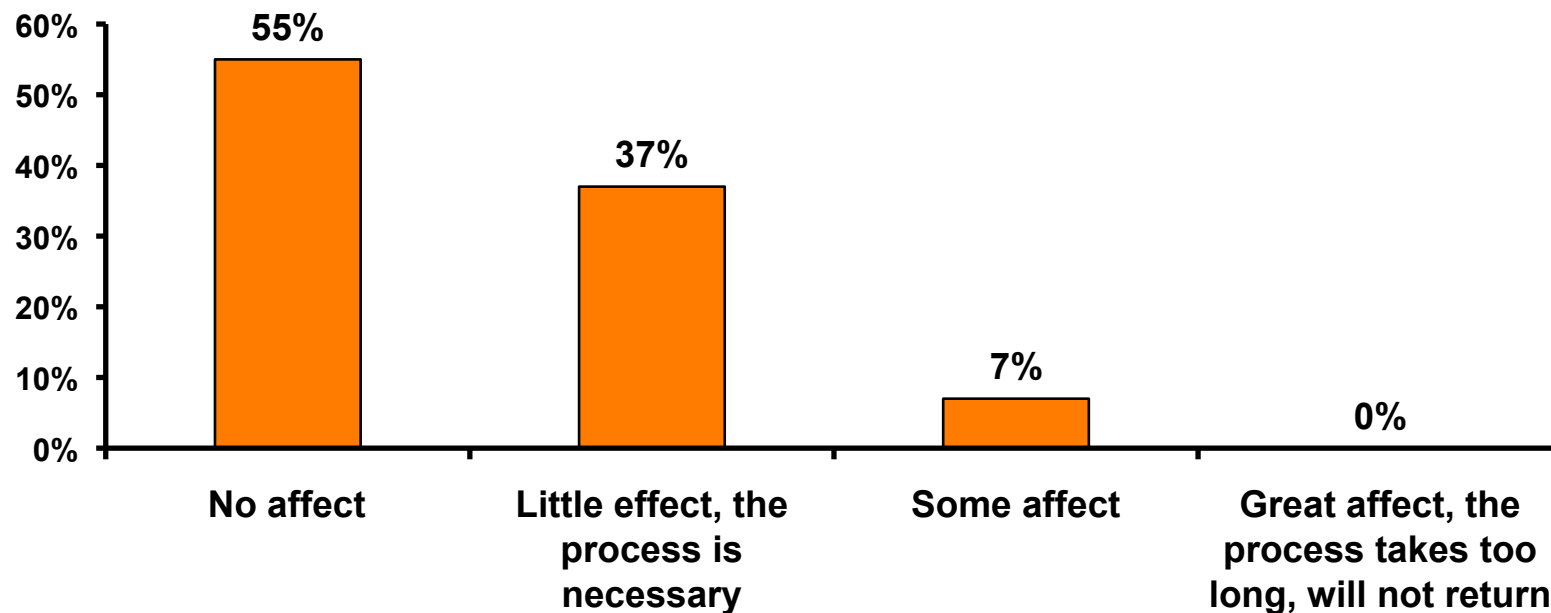


# Concerns about travel outside of Japan - By Age & Income

	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	75%	68%	79%	75%	88%	61%	79%	80%	74%	74%	86%	85%	83%	
Food	44%	39%	52%	42%	36%	43%	56%	38%	51%	59%	46%	30%	33%	
Terrorism	37%	31%	39%	38%	52%	35%	47%	31%	43%	33%	43%	30%	50%	
Expense	34%	35%	37%	30%	24%	26%	53%	33%	42%	31%	32%	33%	17%	
Discrimination against Japanese	9%	8%	7%	16%	6%	9%	9%	7%	11%	4%	16%	18%		
No concerns	6%	6%	2%	12%	6%	13%	6%	3%	8%	6%		9%		
Don't know	4%	6%	2%	6%		4%	3%	7%	2%				17%	
Other	3%	4%	5%	3%			3%	3%	8%	2%		3%	17%	
Should spend at home	3%	4%	5%	1%		4%	3%	3%	2%	4%	3%	3%	17%	
Total	Count	350	108	126	77	33	23	34	61	53	54	37	33	6



# Security Screening/ Immigration Process at Guam International Airport



# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

