



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013

JANUARY 2013



Prepared by: QMark Research

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Background & Methodology

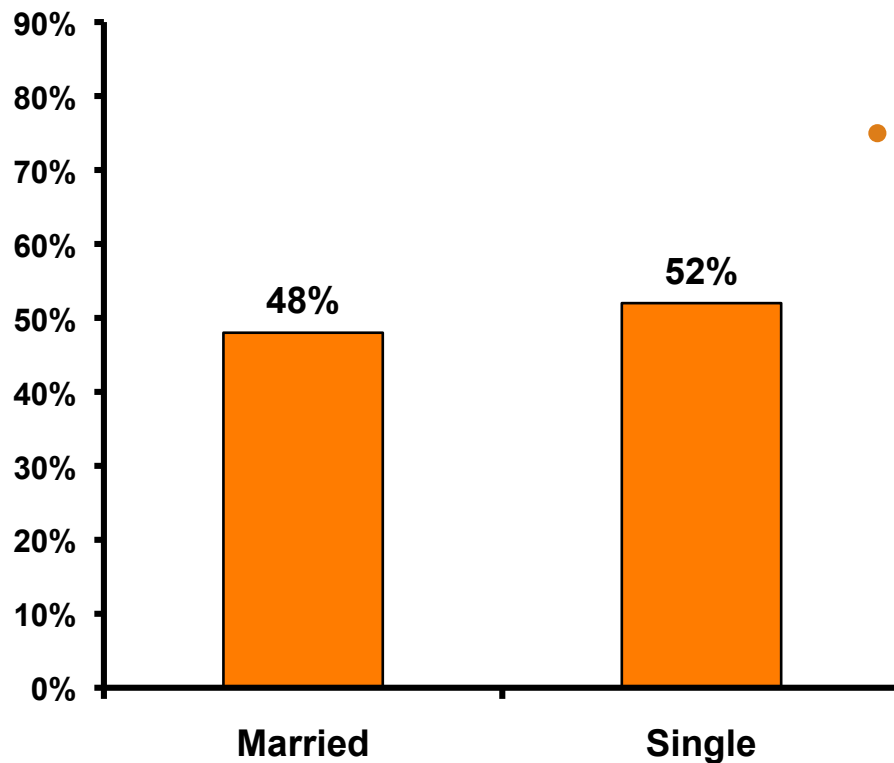
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing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

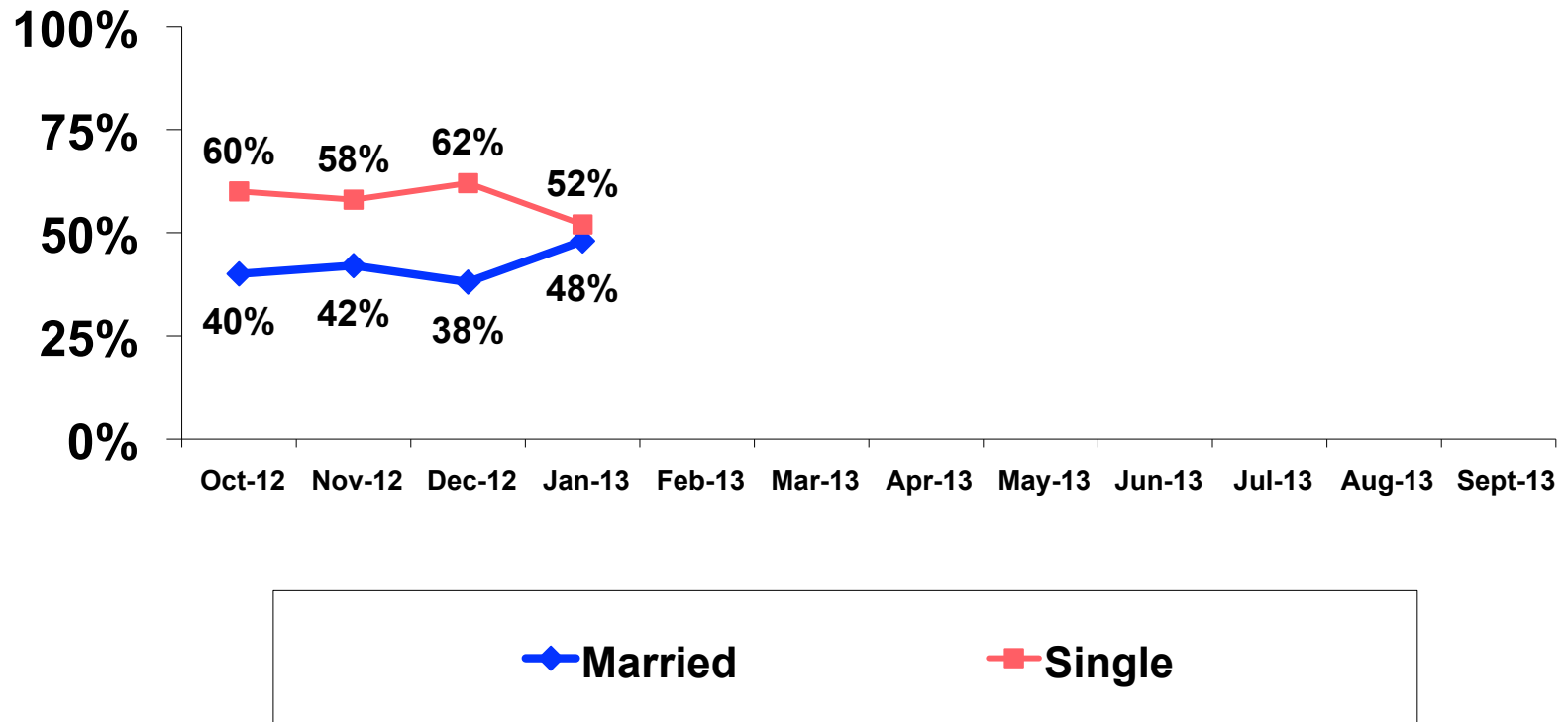
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

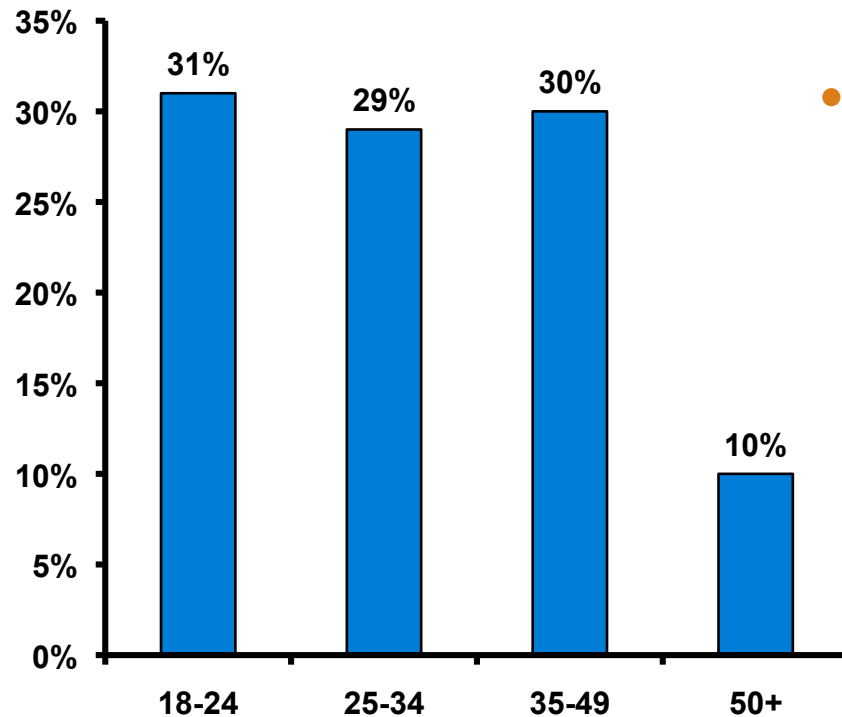


- 63% of repeat visitors are married.

Marital Status

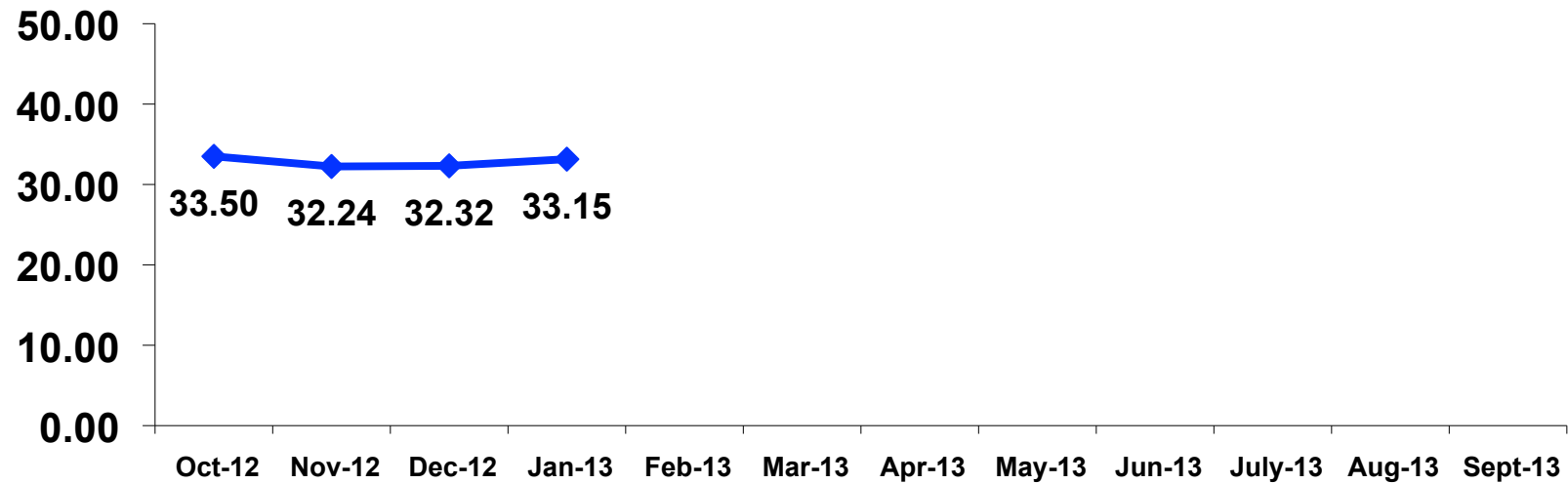


Age - Overall

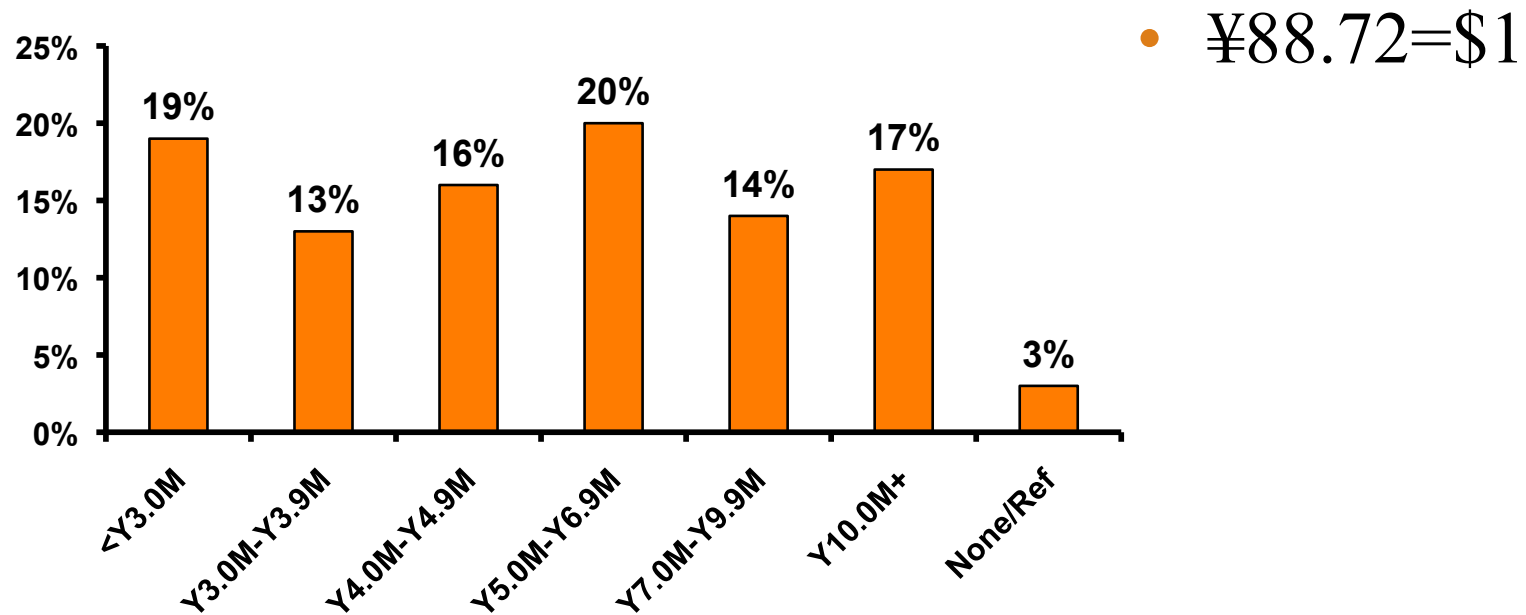


- The average age of the respondents is 33.15 years of age.

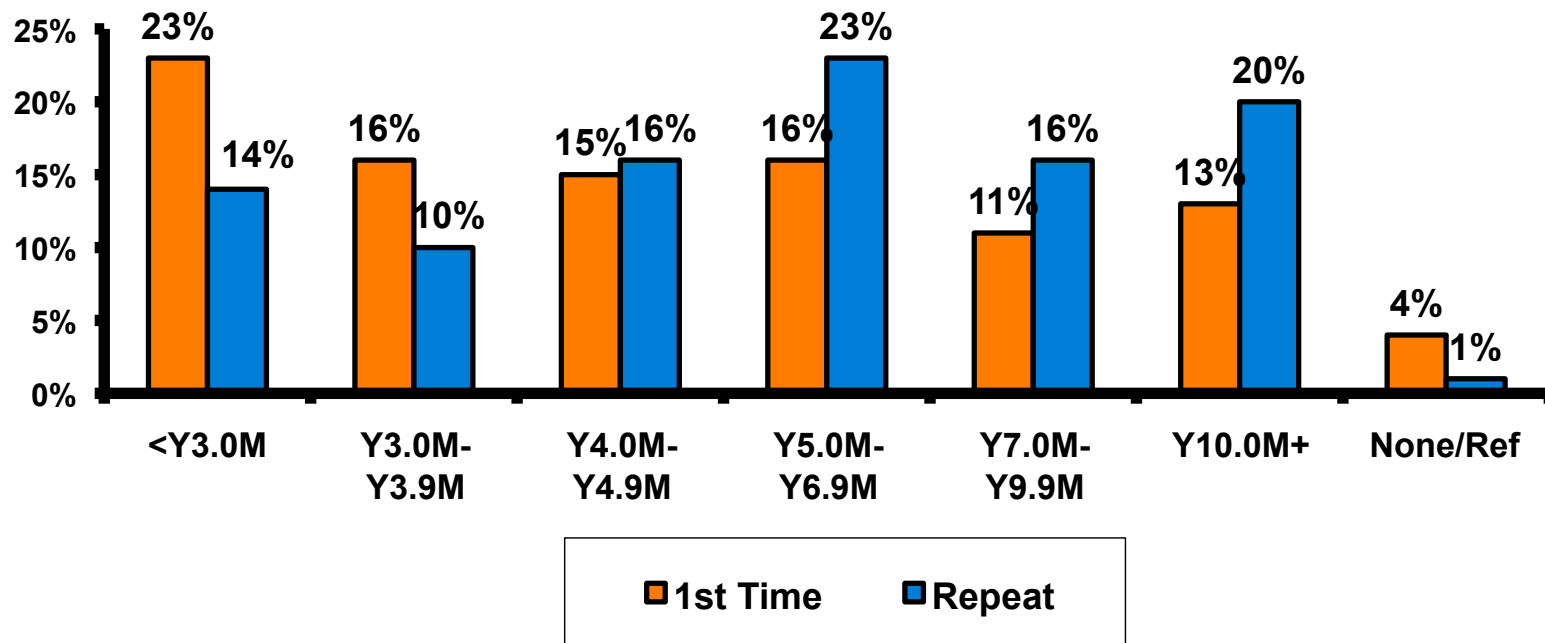
Average Age



Personal Income



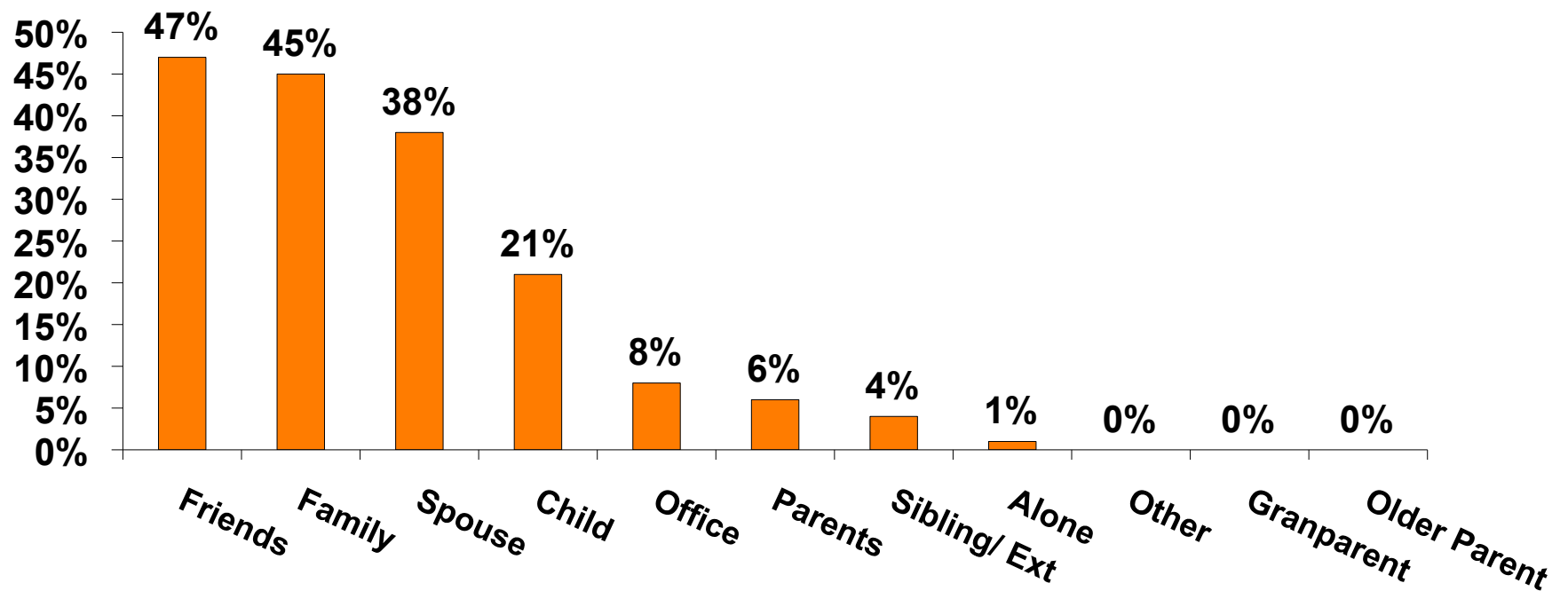
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	23	5	18	13	7	1	2
		Column N %	8%	3%	13%	16%	8%	1%	6%
	Y2.0M-Y3.0M	Count	33	12	21	11	14	5	3
		Column N %	11%	8%	15%	14%	16%	5%	9%
	Y3.0M-Y4.0M	Count	39	16	23	11	15	12	1
		Column N %	13%	10%	16%	14%	17%	12%	3%
	Y4.0M-Y5.0M	Count	47	29	18	5	20	18	4
		Column N %	16%	18%	13%	6%	22%	18%	13%
	Y5.0M-Y7.0M	Count	59	37	22	11	16	20	12
		Column N %	20%	23%	16%	14%	18%	20%	38%
	Y7.0M-Y10.0M	Count	41	26	15	8	11	19	3
		Column N %	14%	16%	11%	10%	12%	19%	9%
	Y10.0M+	Count	50	31	19	16	6	21	7
		Column N %	17%	19%	13%	20%	7%	21%	22%
	No Income	Count	9	4	5	6	1	2	
		Column N %	3%	3%	4%	7%	1%	2%	
	Total	Count	301	160	141	81	90	98	32

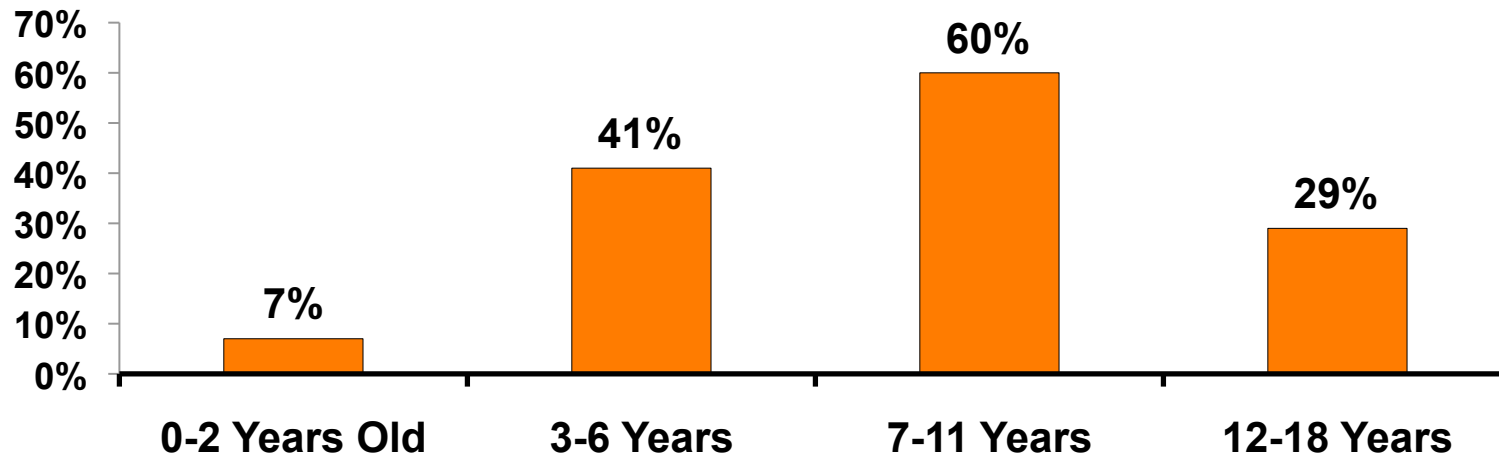
Travel Companions



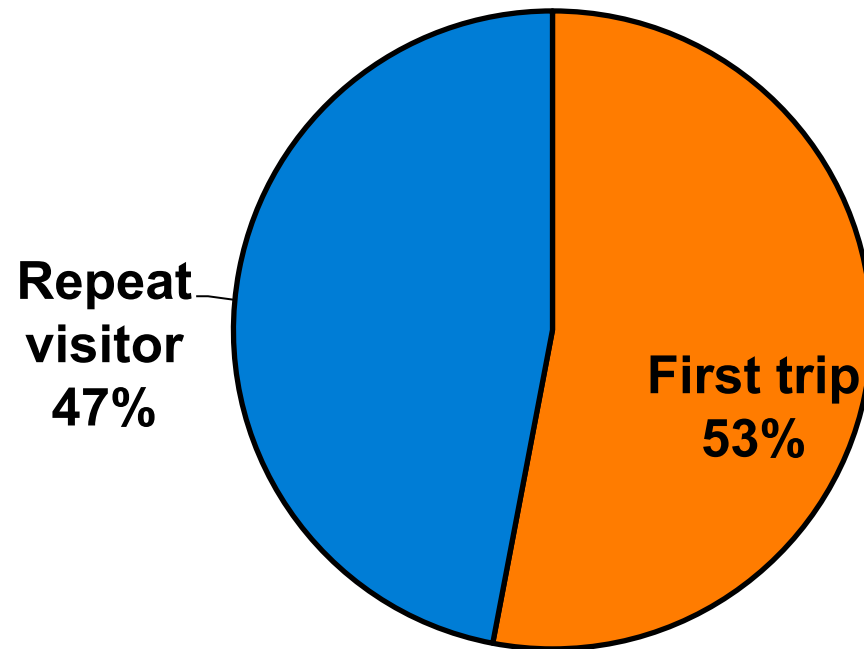
Number of Children Travel Party

N=75 total respondents traveling with children.

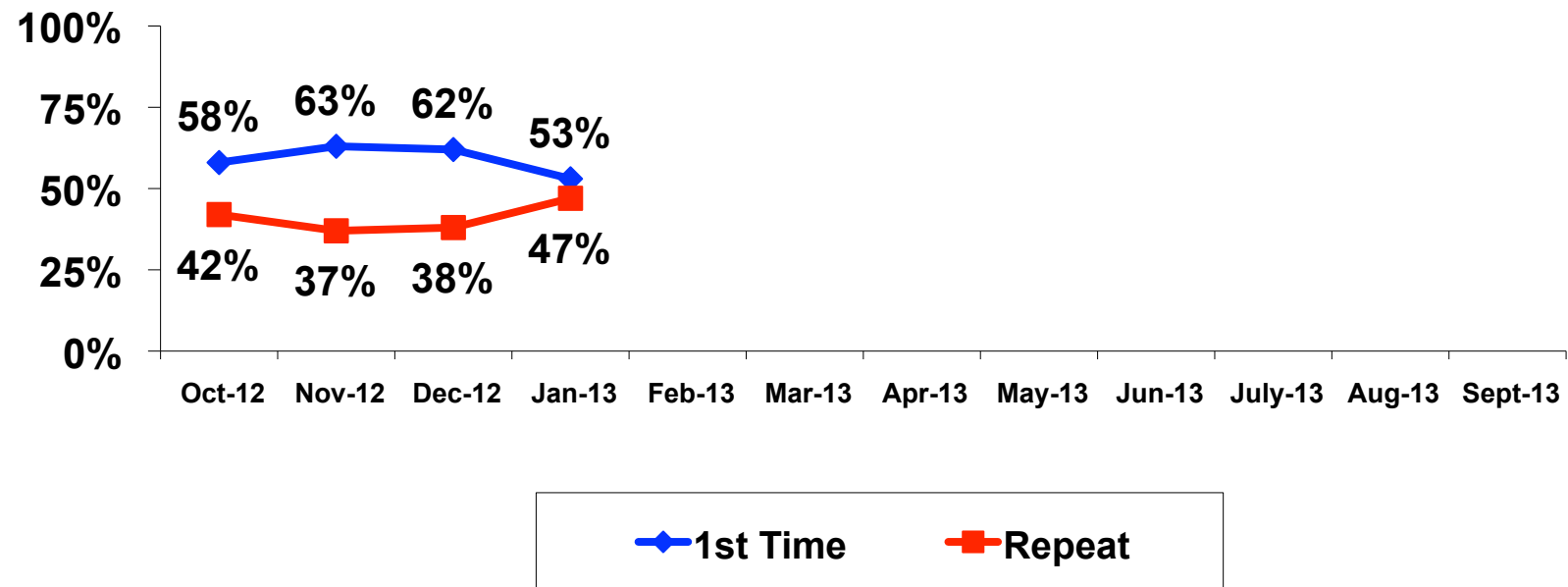
(Of those N=75 respondents, there is a total of 130 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



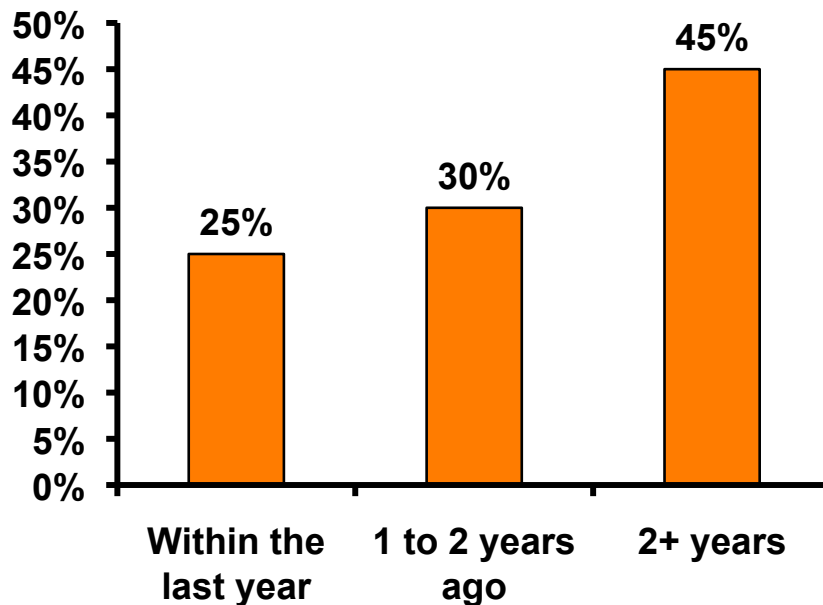
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	178	86	92	
		Column N %	51%	46%	56%	
	Female	Count	173	101	72	
		Column N %	49%	54%	44%	
	Total	Count	351	187	164	
AGE	18-24	Count	107	83	24	
		Column N %	31%	45%	15%	
	25-34	Count	101	59	42	
		Column N %	29%	32%	26%	
	35-49	Count	106	31	75	
		Column N %	30%	17%	46%	
	50+	Count	34	13	21	
		Column N %	10%	7%	13%	
		Total	Count	348	186	162

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

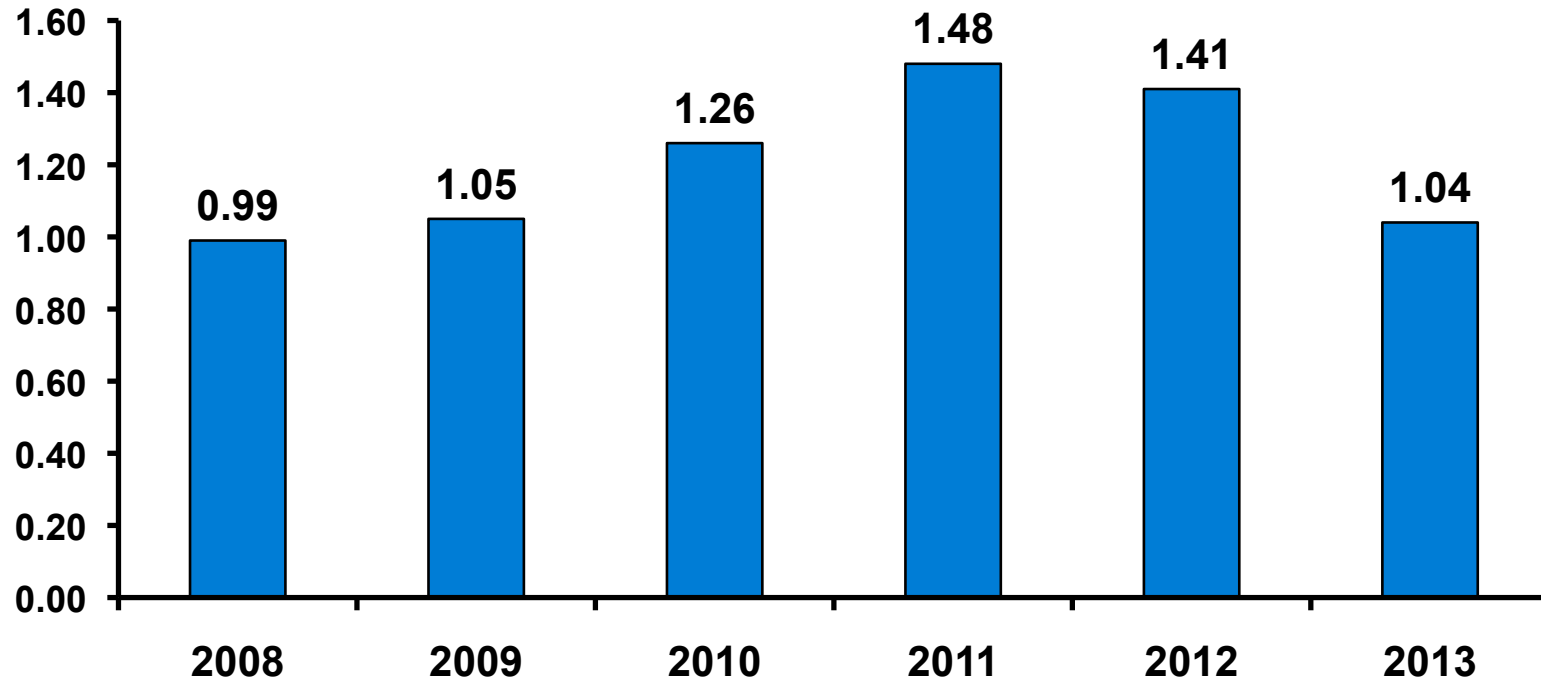
Repeat Visitors Last Trip

n = 163



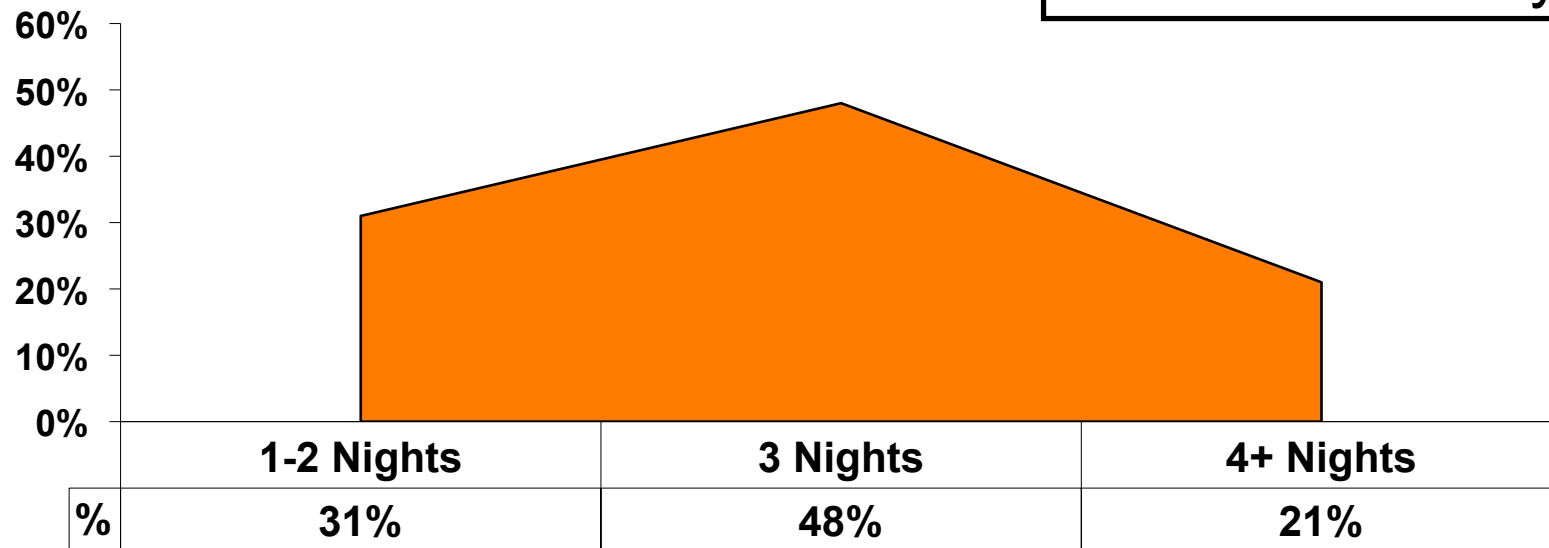
- The average repeat visitor has been to Guam 3.85 times.
- Half the repeat visitors have been to Guam within the last 2 years.

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

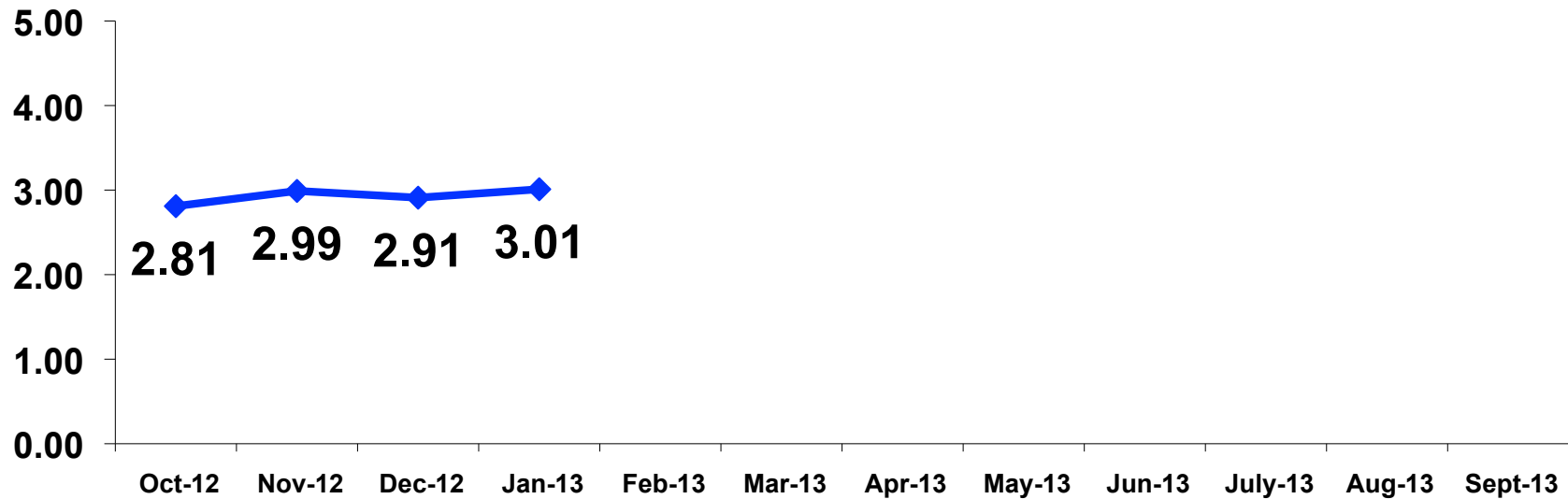


Length of Stay

Mean = 3.01 Days
Median = 3.0 Days



Average Length of Stay

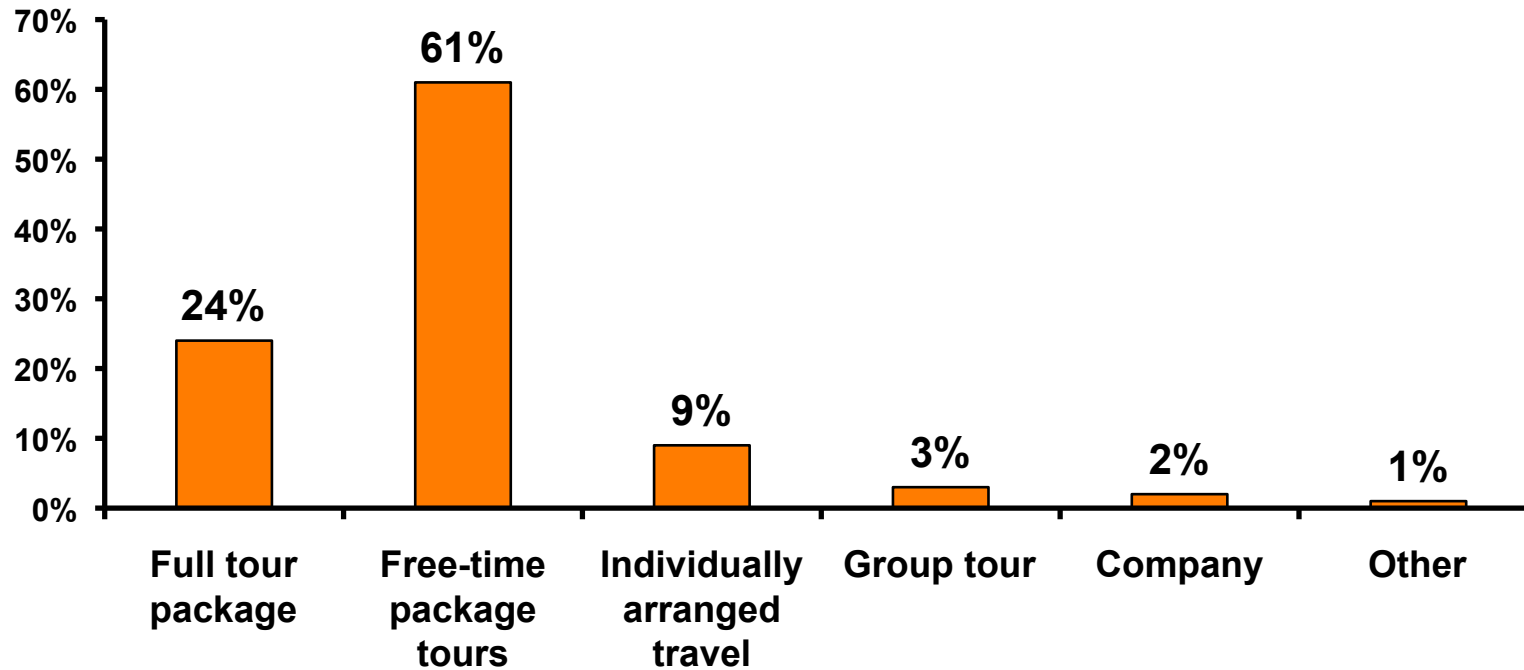


Occupation by Income

	TOTAL	Q26								
		-	<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	18%	29%	18%	10%	6%	15%	10%	18%	44%	
Engineer	15%	14%		31%	21%	19%	15%	8%	11%	
Office worker non-mgr	14%	19%	27%	21%	11%	8%	10%	10%		
Self-employed	14%	14%	9%	13%	13%	14%	10%	24%	11%	
Salesperson	9%		12%	8%	23%	10%	7%	2%		
Manager	6%		3%	3%	6%	7%	15%	8%		
Homemaker	4%		3%		4%	5%	5%	8%	11%	
Freeter	3%	10%	3%		4%		7%	2%		
Skilled worker	3%		3%	5%	6%	2%		2%		
Professional/ Specialist	3%			8%	2%		5%	6%		
Teacher	2%		3%	3%		5%	2%		11%	
Executive (30+ employees)	2%		3%			3%	5%	4%		
Other	2%	10%	9%					2%		
Unemployed	2%		3%			5%			11%	
Govt- office worker non-mgr	2%	5%			2%	5%		2%		
Free-lancer	1%		3%			2%	2%	2%		
Govt- Manager	1%						2%	2%		
25	0%						2%			
Retired	0%						2%			
Total	Count 340	21	33	39	47	59	41	50	9	

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

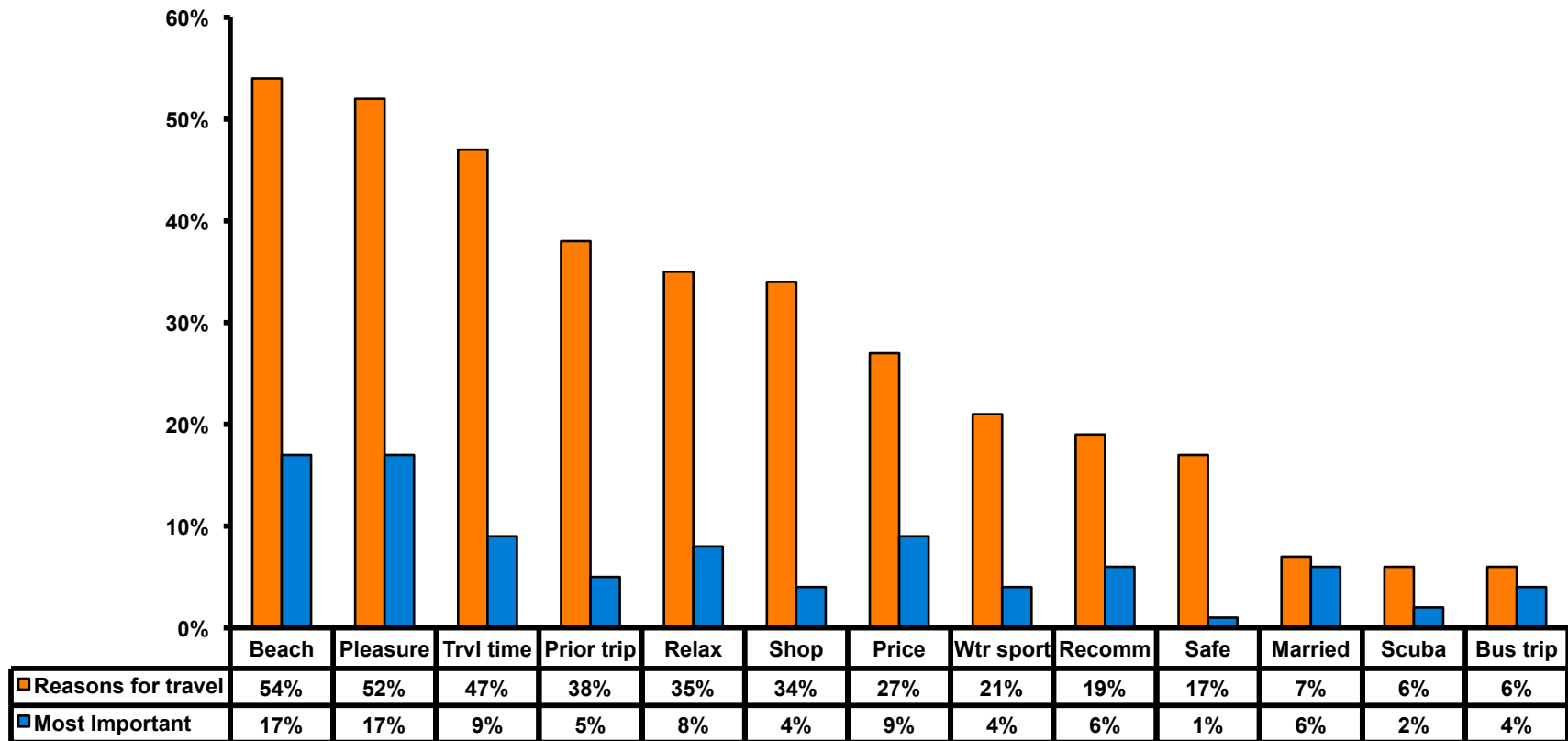


Accommodation by Income

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	20%	39%	30%	31%	17%	10%	5%	12%	33%	
PIC Club	7%	9%	3%	3%	15%	8%	7%	10%		
Guam Reef Hotel	6%		9%	15%		7%	15%			
Outrigger Guam Resort	6%	9%		5%	9%	3%	12%	8%	11%	
Pacific Bay Hotel	6%	4%	6%	5%	4%	7%	5%	6%	22%	
Grand Plaza Hotel	6%	9%	9%	3%		7%		6%		
Hotel Nikko Guam	5%	4%	3%	5%	13%	8%	2%	6%		
Oceanview Hotel	5%		6%	13%	2%	2%	5%	6%	11%	
Onward Beach Resort	5%		3%	3%	9%	5%	7%	6%		
Fiesta Resort Guam	4%	4%		3%	4%	3%	7%	8%		
Bayview Hotel	4%	4%	6%	3%	2%	3%		6%	11%	
Sheraton Laguna Guam	4%	4%	6%	3%	2%	5%	5%	6%		
Hilton Guam Resort	3%		3%		9%	2%		2%		
Westin Resort Guam	3%	4%			4%	8%	5%	2%		
Holiday Resort Guam	3%	4%	3%	5%		5%	2%			
Hotel Santa Fe	2%			3%	2%		10%	2%		
Condo	2%		6%	3%	2%			4%		
Hyatt Regency Guam	2%				2%	3%	2%			
Leo Palace Resort	2%	4%				2%	5%	2%		
Guam Marriott Resort	2%					3%				
Royal Orchid Guam	1%				4%	2%		2%	11%	
Ramada Suites Guam	1%		3%				2%	2%		
Other	1%		3%				2%	2%		
Tumon Bay Capital Hotel	1%					3%				
Home stay/ friend/ relative	1%					2%		2%		
Guam Aurora Resort	0%									
Total	Count	351	23	33	39	47	59	41	50	9

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	54%	55%	52%	51%	56%	51%	56%	
	Pleasure	52%	57%	50%	51%	44%	48%	57%	
	Short travel time	47%	34%	43%	62%	53%	50%	45%	
	Previous trip	38%	19%	28%	66%	41%	44%	32%	
	Relax	35%	25%	39%	37%	38%	34%	35%	
	Shopping	34%	36%	36%	32%	26%	26%	43%	
	Price	27%	40%	21%	21%	21%	25%	29%	
	Water sports	21%	28%	17%	23%	6%	18%	24%	
	Recomm- friend/family/trvl agnt	19%	28%	18%	16%	9%	17%	22%	
	Safe	17%	13%	10%	28%	24%	18%	17%	
	Married/ Attn wedding	7%	1%	19%	1%	9%	8%	6%	
	Scuba	6%	9%	8%	2%	3%	2%	10%	
	Company/ Business Trip	6%	5%	4%	10%	3%	10%	2%	
	Other	4%	6%	3%	4%	3%	3%	5%	
	Golf	3%			5%	18%	5%	1%	
	Visit friends/ Relatives	3%	2%	2%	3%	6%	3%	2%	
	Organized sports	2%		5%		6%	1%	3%	
	Honeymoon	2%	2%	3%	3%		4%	1%	
	Company Sponsored	1%	1%	3%			1%	1%	
	Career Cert/ Testing	0%	1%					1%	
	Total	Count	349	107	100	105	34	176	173

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	54%	43%	41%	54%	62%	57%	49%	60%	33%	
	Pleasure	52%	26%	59%	64%	60%	48%	46%	62%	44%	
	Short travel time	47%	26%	38%	51%	51%	55%	49%	56%	22%	
	Previous trip	38%	17%	34%	31%	43%	40%	41%	52%	22%	
	Relax	35%	22%	31%	41%	47%	40%	27%	38%	22%	
	Shopping	34%	30%	38%	33%	23%	33%	34%	44%	44%	
	Price	27%	17%	31%	33%	19%	29%	20%	36%	22%	
	Water sports	21%	13%	16%	31%	21%	24%	17%	18%	11%	
	Recomm- friend/family/trvl agnt	19%	26%	41%	8%	11%	21%	17%	16%	22%	
	Safe	17%	9%	6%	21%	21%	17%	20%	28%	11%	
	Married/ Attn wedding	7%		3%	3%	13%	14%	15%	2%		
	Scuba	6%	9%	16%	5%	4%	3%	5%	6%		
	Company/ Business Trip	6%	13%	3%	13%	9%	2%		4%	22%	
	Other	4%	9%		3%	4%	2%	5%	4%		
	Golf	3%				2%	10%	5%	2%		
	Visit friends/ Relatives	3%		3%			5%		4%	11%	
	Organized sports	2%			5%		3%	2%	4%		
	Honeymoon	2%		9%		4%	2%	2%			
	Company Sponsored	1%	4%			2%	2%				
	Career Cert/ Testing	0%							2%		
	Total	Count	349	23	32	39	47	58	41	50	9

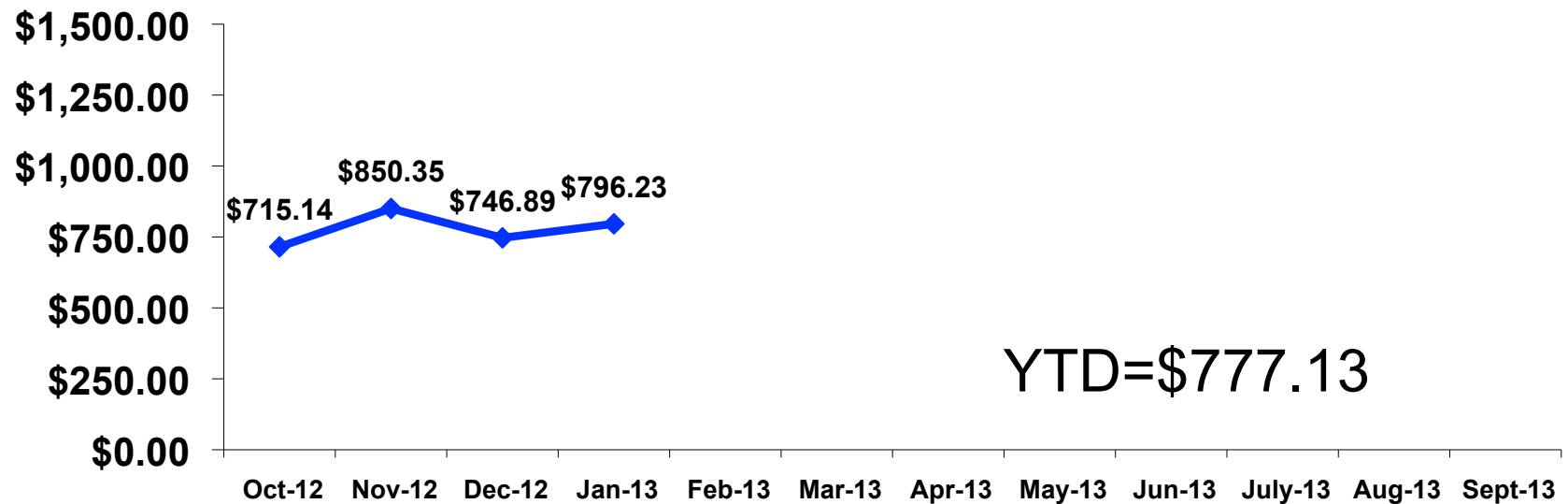
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥88.72/US\$1

- \$1,668.58 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$15,780 = maximum (highest amount recorded for the entire sample)
- \$796.23 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

¥88.72=\$1

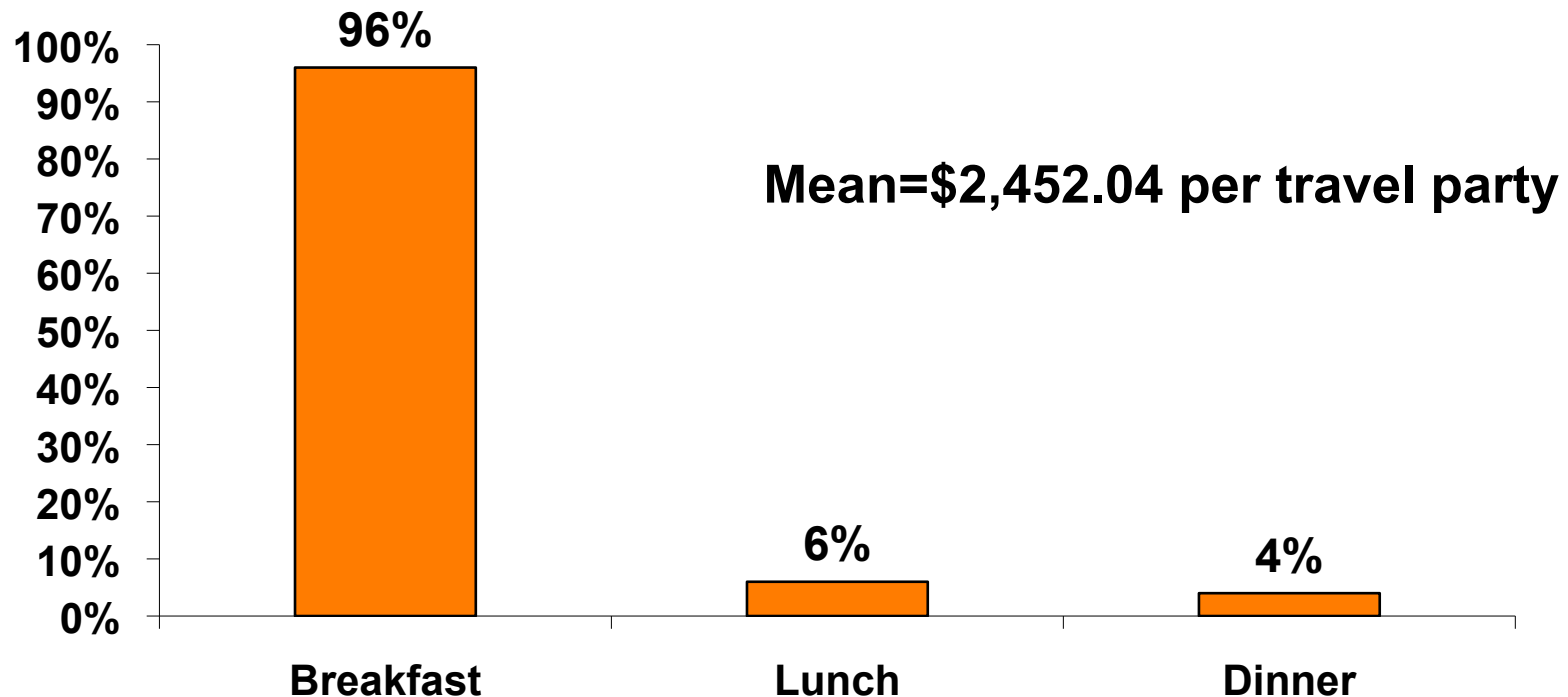
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,482.20
Air & Accommodation w/ daily meal package	\$2,452.04
Air only	\$2,021.61
Accommodation only	\$845.36
Accommodation w/ daily meal only	\$3,663.21
Food & Beverages in Hotel	\$40.58
Ground transportation - Japan	\$92.15
Ground transportation - Guam	\$44.24
Optional tours/ activities	\$279.98
Other expenses	\$326.55
Total Prepaid	\$1,668.58

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

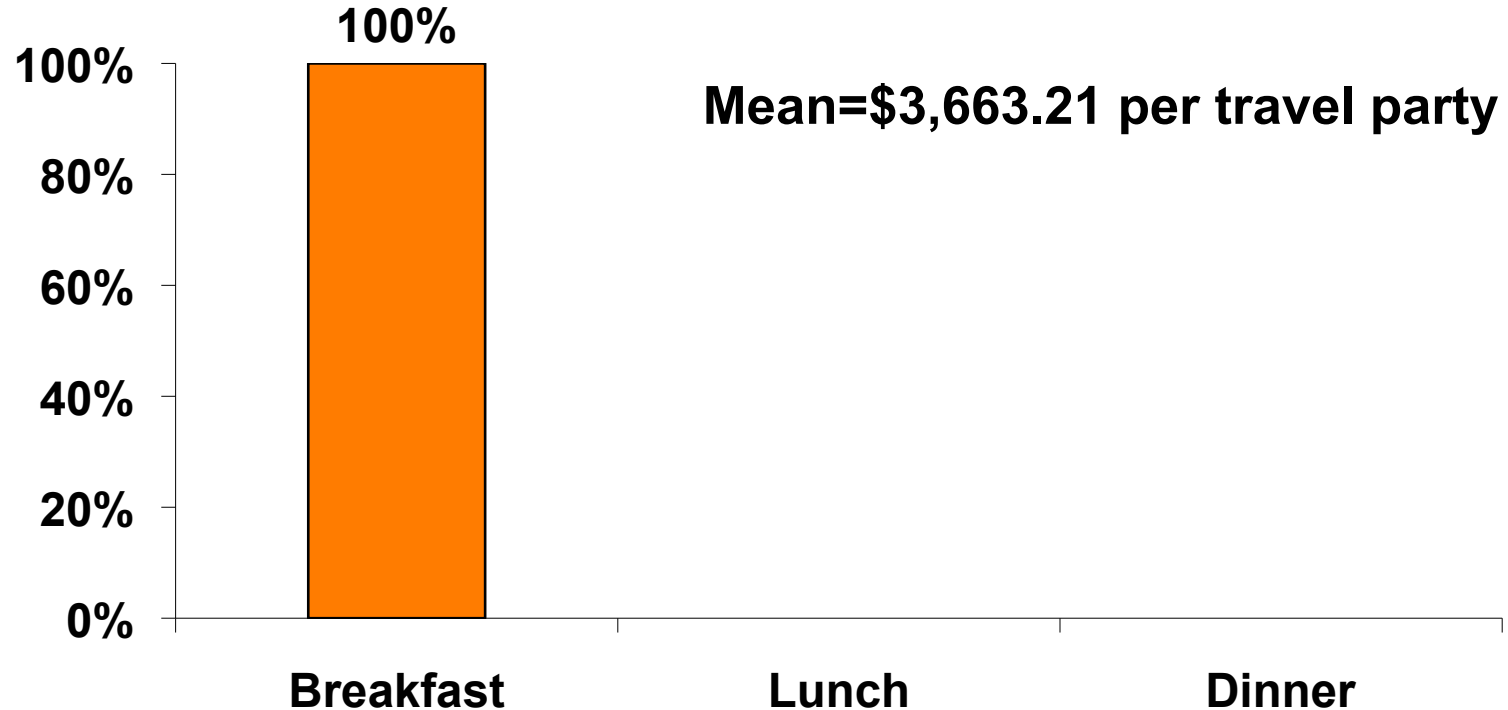
n=77



Prepaid Meal Breakdown

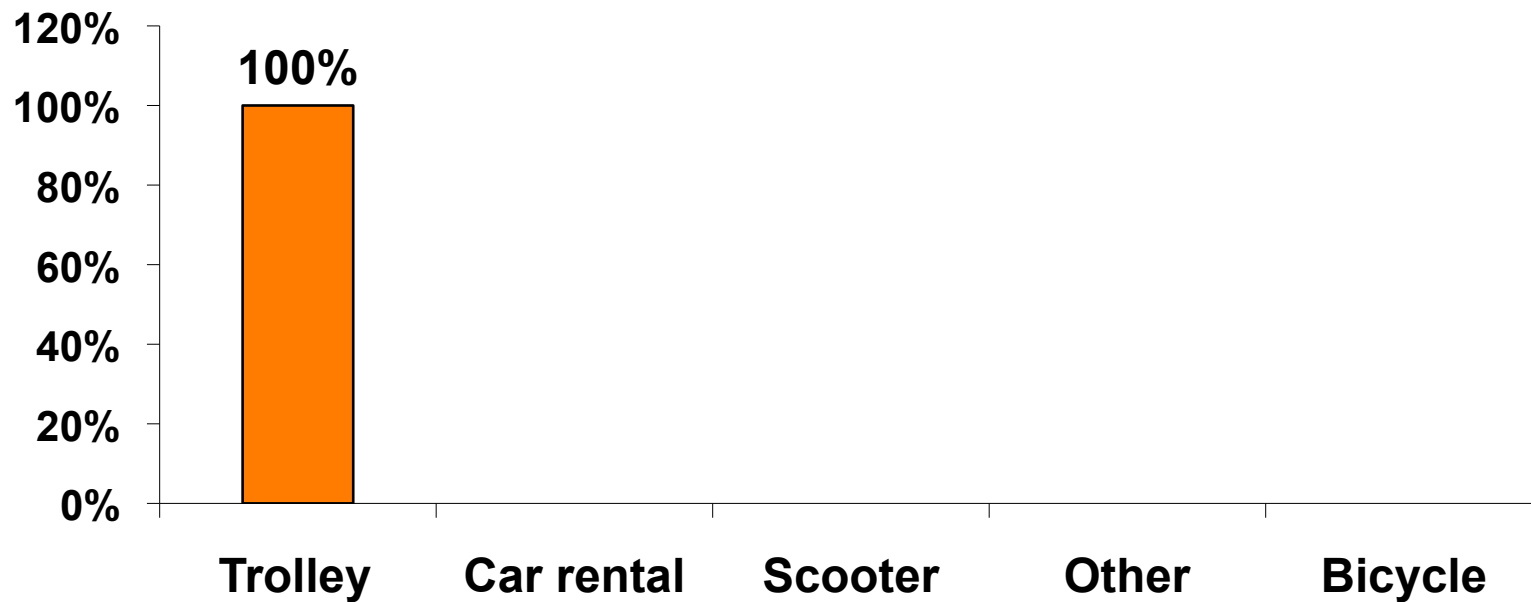
Accommodations with Daily Meal Package

n=1



Prepaid Ground Transportation

n=2



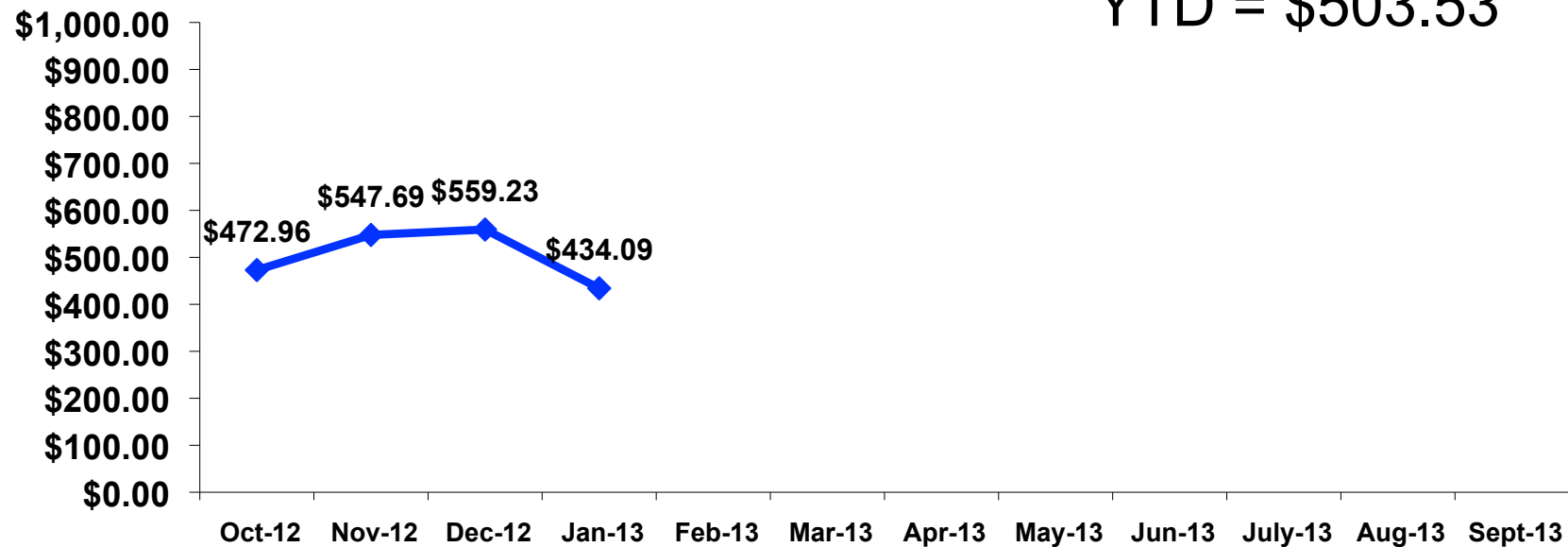
Mean=\$44.24 per travel party

On-Island Expenditures

- \$765.24 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,000 = Maximum (highest amount recorded for the entire sample)
- \$434.09 = overall mean average per person on-island expenditure

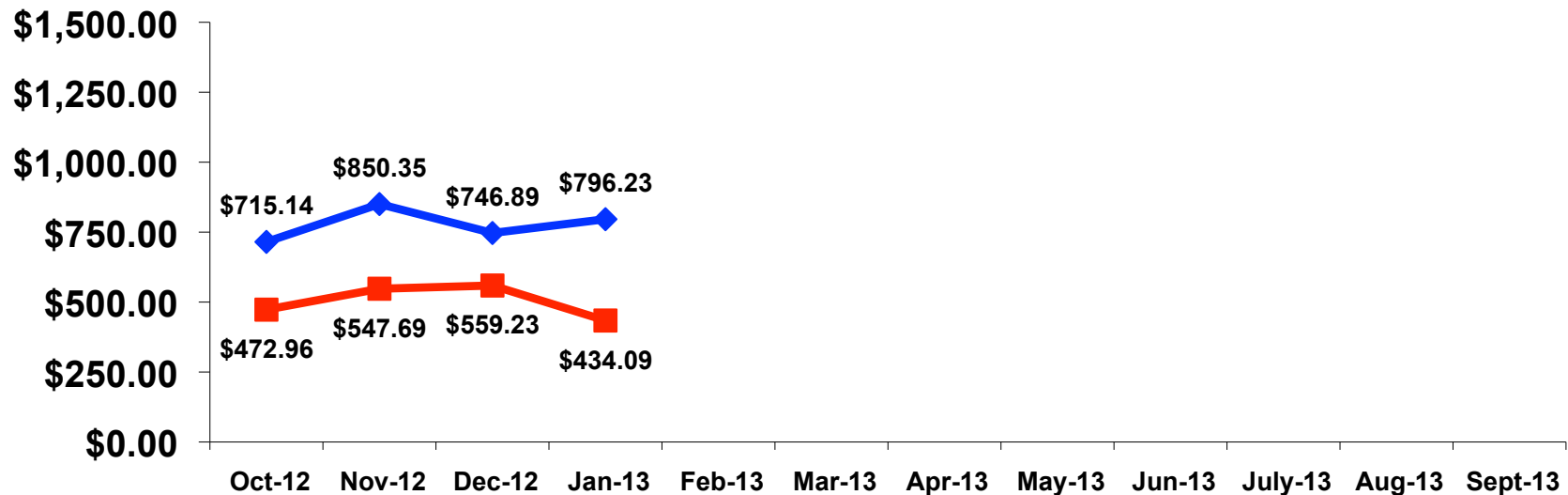
On-Island Expenditures Per Person

YTD = \$503.53



Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$777.13 On-Island YTD = \$503.53



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	\$434.09	\$427.36	\$441.01	\$338.21	\$404.54	\$442.72	\$542.92	\$392.91	\$463.63	\$432.58	\$636.53
	Median	\$333	\$333	\$350	\$300	\$310	\$336	\$388	\$315	\$400	\$313	\$275
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$25	\$0	\$0	\$0	\$0
	Maximum	\$3,500	\$2,700	\$3,500	\$1,100	\$2,000	\$2,700	\$2,000	\$1,500	\$2,000	\$1,500	\$3,500

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$32.58	\$48.33	\$16.38	\$2.67	\$29.40	\$70.11	\$20.29
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$28.42	\$36.50	\$20.11	\$13.28	\$29.10	\$43.92	\$27.79
	Median	\$0	\$2	\$0	\$0	\$0	\$20	\$0
F&B RESTRNT	Mean	\$73.35	\$105.73	\$40.03	\$32.08	\$52.65	\$123.69	\$112.35
	Median	\$0	\$35	\$0	\$0	\$0	\$50	\$25
OPT TOUR	Mean	\$64.03	\$78.16	\$49.50	\$51.93	\$49.59	\$102.68	\$30.15
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$182.01	\$213.79	\$149.31	\$85.49	\$178.29	\$282.79	\$189.85
	Median	\$4	\$10	\$0	\$0	\$0	\$100	\$0
GIFT- OTHER	Mean	\$95.43	\$111.85	\$78.54	\$50.65	\$83.47	\$145.07	\$117.35
	Median	\$30	\$49	\$20	\$0	\$40	\$100	\$75
TRANS	Mean	\$16.16	\$23.22	\$8.90	\$5.43	\$10.75	\$31.85	\$18.53
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$274.21	\$325.62	\$221.31	\$183.14	\$156.69	\$371.75	\$612.35
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$108
TOTAL	Mean	\$765.24	\$942.64	\$582.71	\$429.36	\$587.58	\$1,167.13	\$1,125.74
	Median	\$500	\$598	\$420	\$350	\$420	\$800	\$650

On-Island Expenditures

First Timers & Repeaters

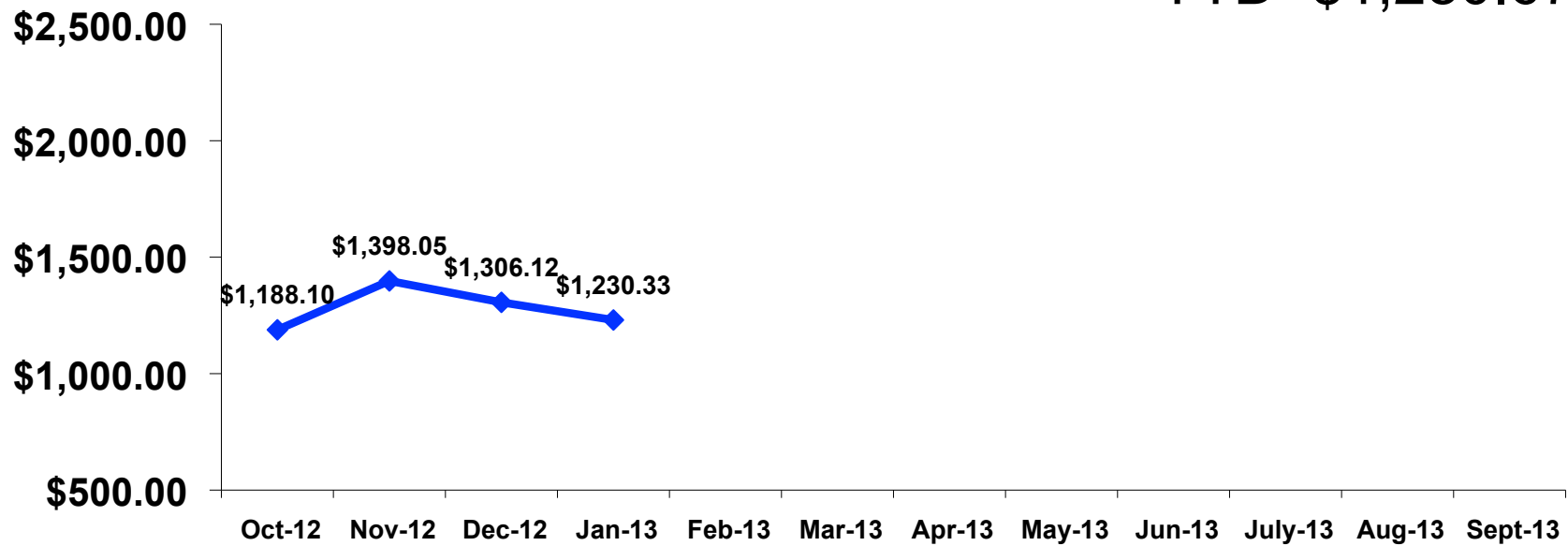
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$32.58	\$20.79	\$46.03
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$28.42	\$21.84	\$35.92
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$73.35	\$47.72	\$102.57
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$64.03	\$64.40	\$63.62
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$182.01	\$118.24	\$254.73
	Median	\$4	\$0	\$45
GIFT- OTHER	Mean	\$95.43	\$76.25	\$117.30
	Median	\$30	\$20	\$50
TRANS	Mean	\$16.16	\$10.37	\$22.76
	Median	\$0	\$0	\$0
OTHER	Mean	\$274.21	\$166.24	\$397.32
	Median	\$0	\$0	\$0
TOTAL	Mean	\$765.24	\$524.58	\$1,039.64
	Median	\$500	\$400	\$605

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,230.33 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,270 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

YTD=\$1,280.67

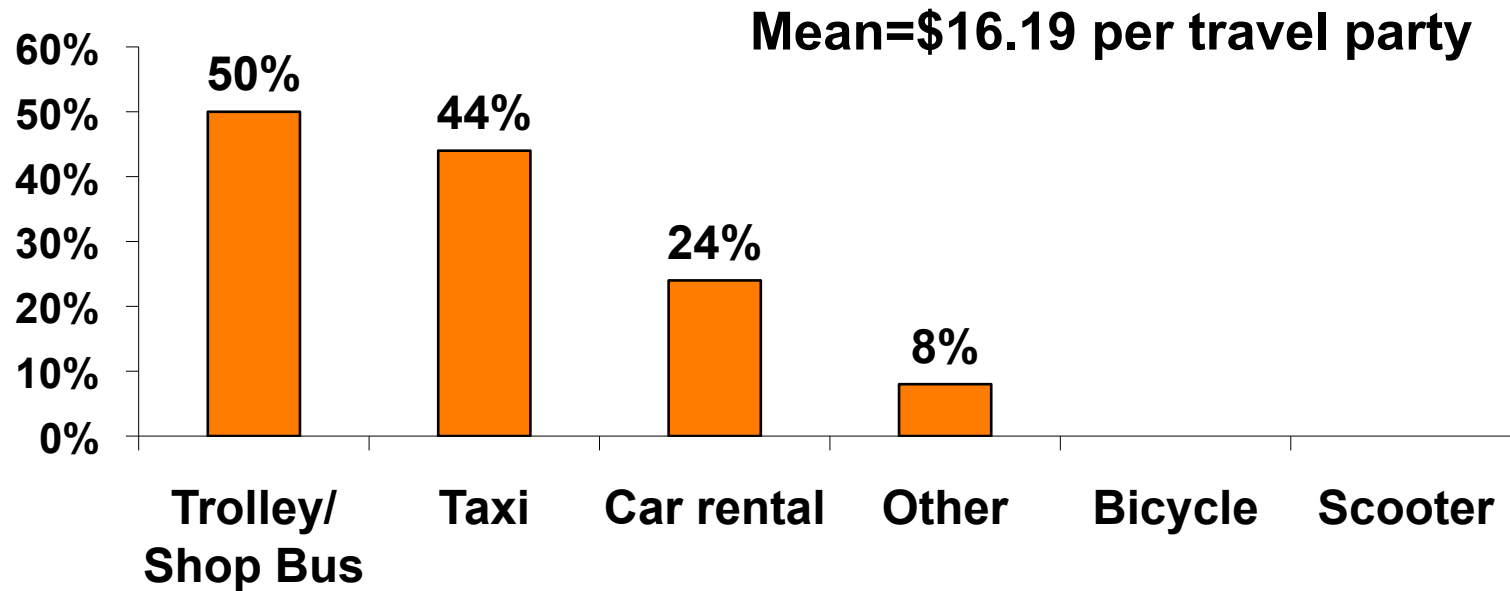


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$32.58
Food & beverage in fast food restaurant/ convenience store	\$28.42
Food & beverage at restaurants or drinking establishments outside a hotel	\$73.35
Optional tours and activities	\$64.03
Gifts/ souvenirs for yourself/companions	\$182.01
Gifts/ souvenirs for friends/family at home	\$95.43
Local transportation	\$16.16
Other expenses not covered	\$274.21
Average Total	\$765.24

Local Transportation

n=50



Guam Airport Expenditures

- \$31.88 = Mean
- \$5 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,500 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

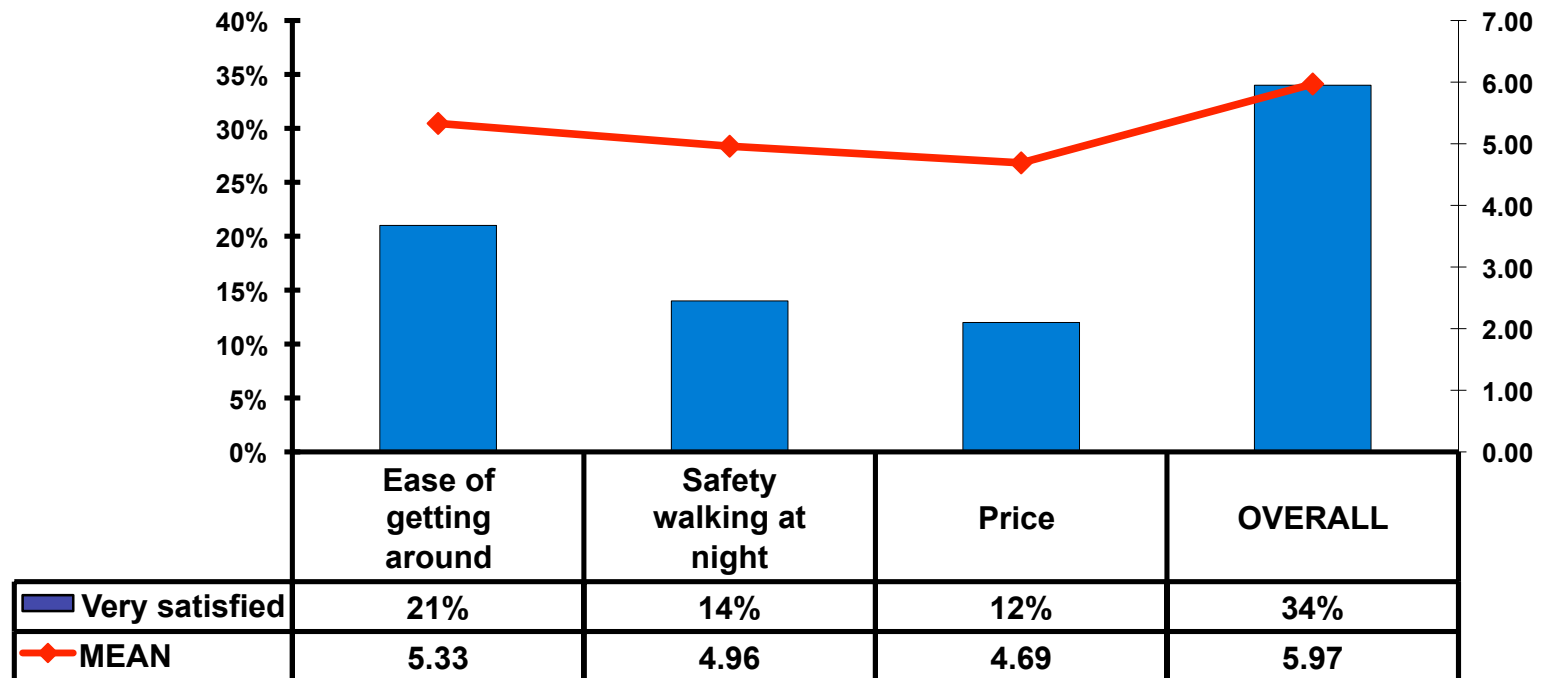
	MEAN \$
Food & Beverages	\$7.09
Gifts/Souvenirs Self	\$7.76
Gifts/Souvenirs Others	\$17.03
Total	\$31.88

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

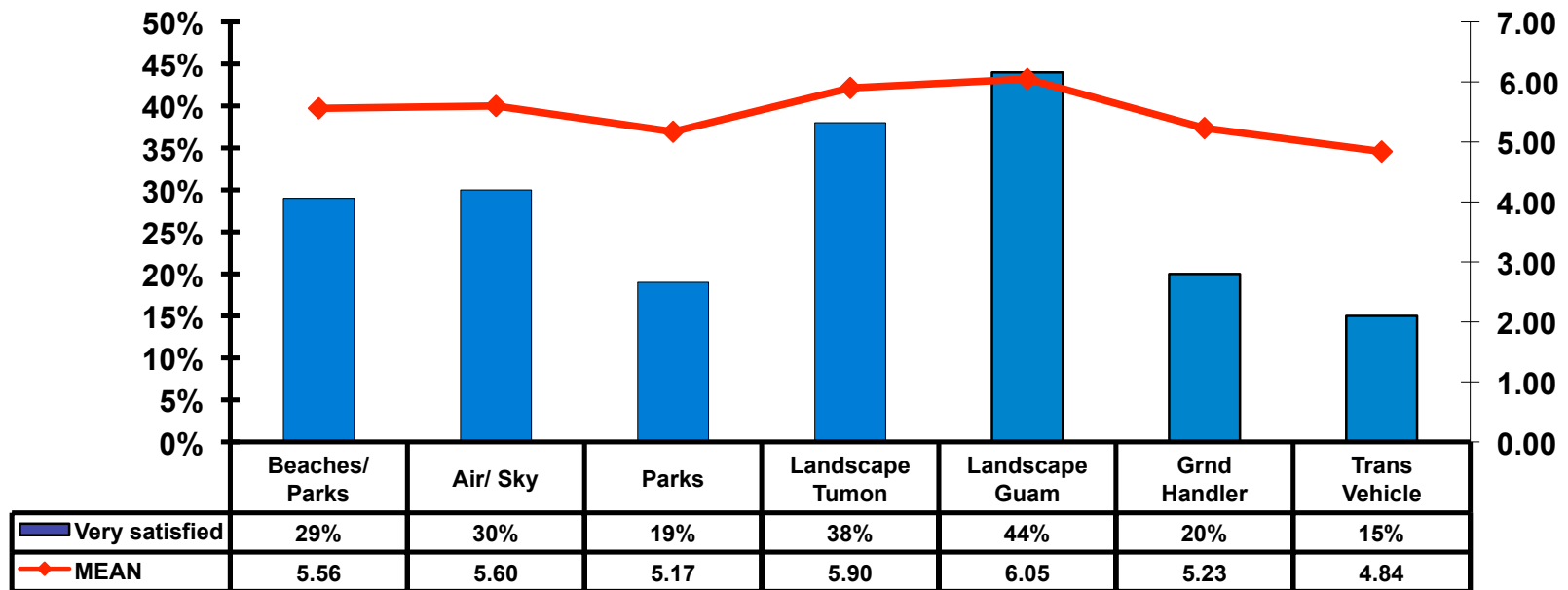
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

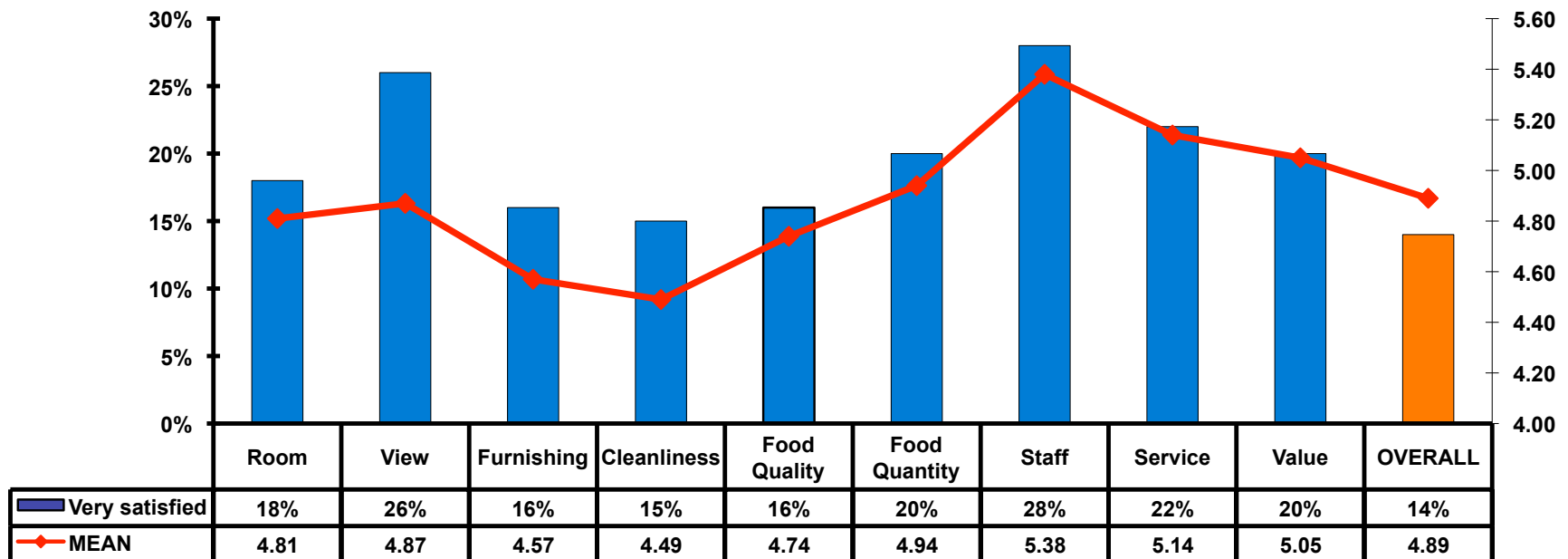
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

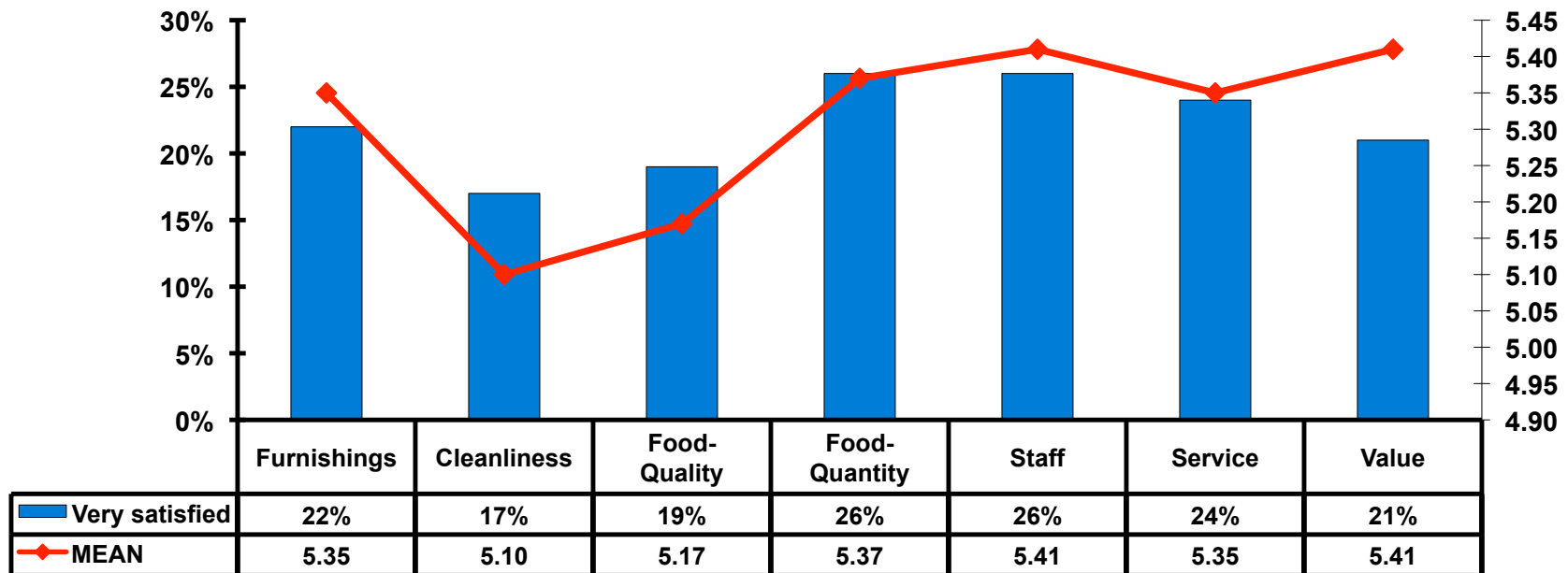
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

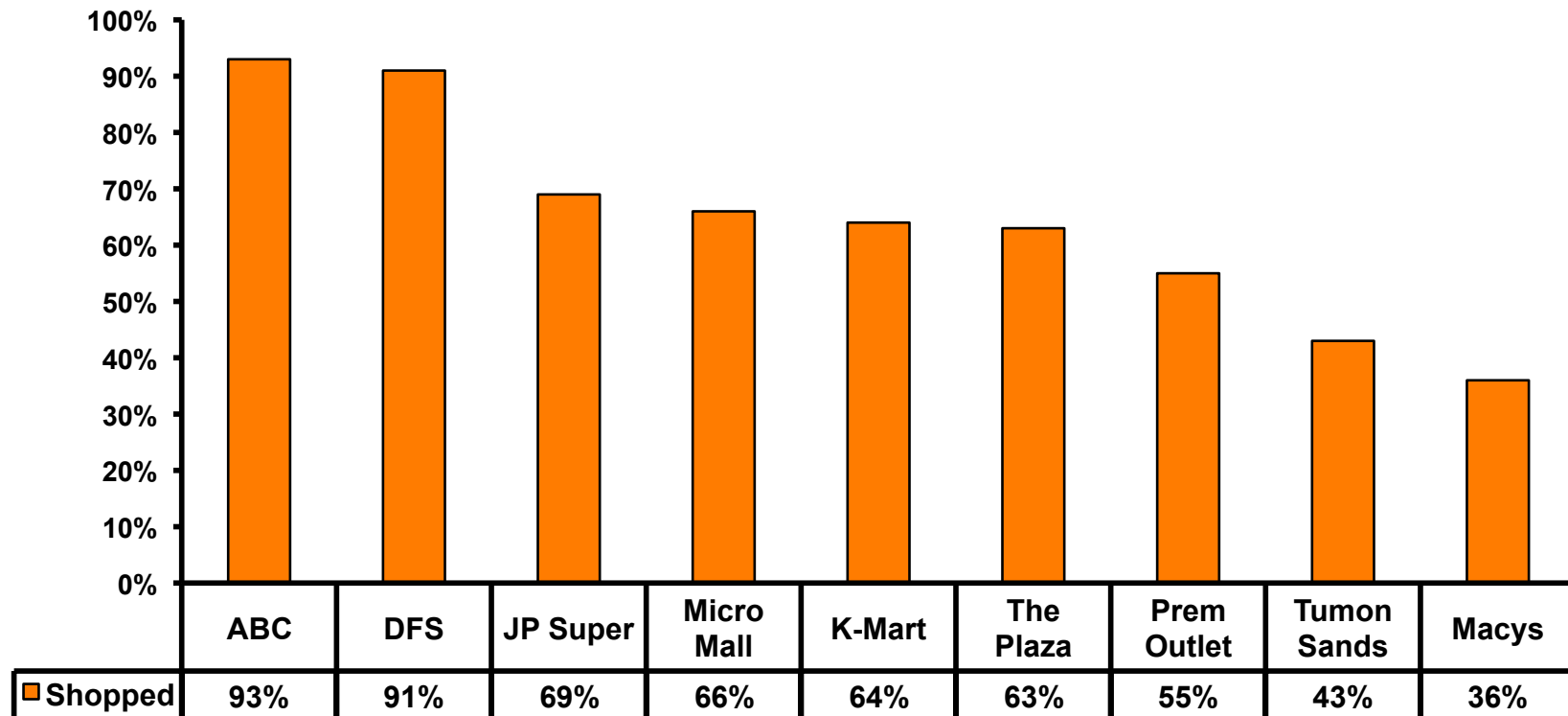
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

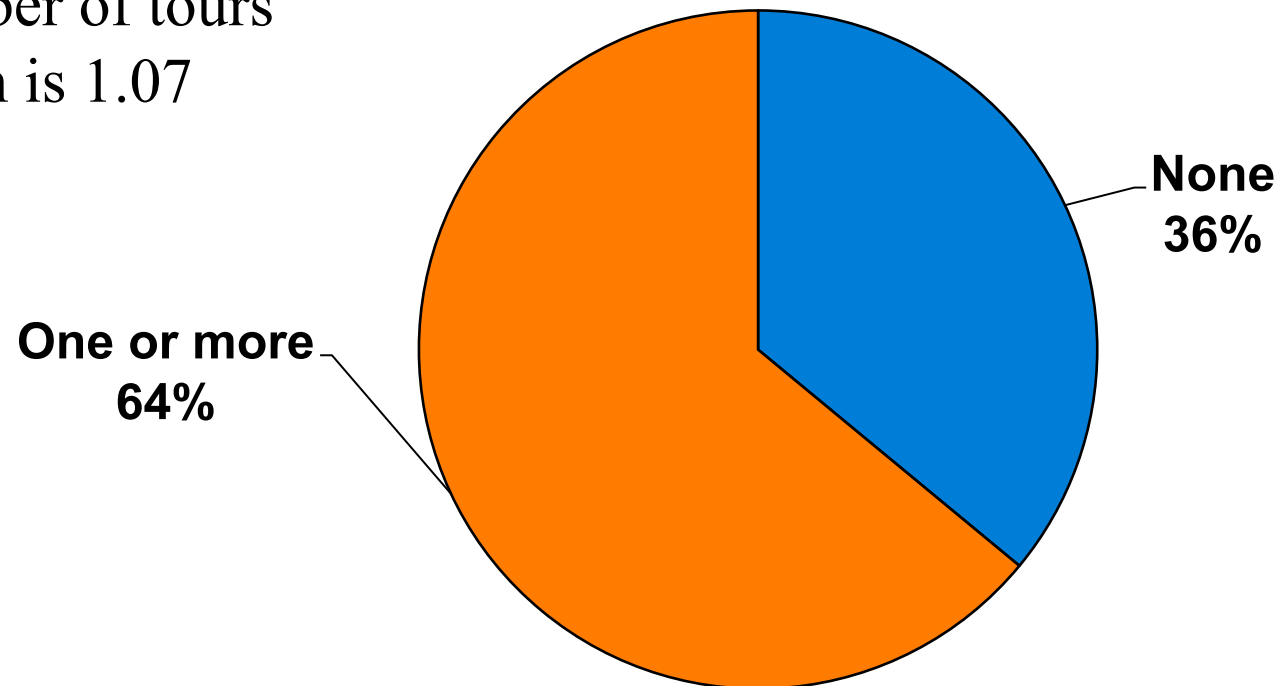
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

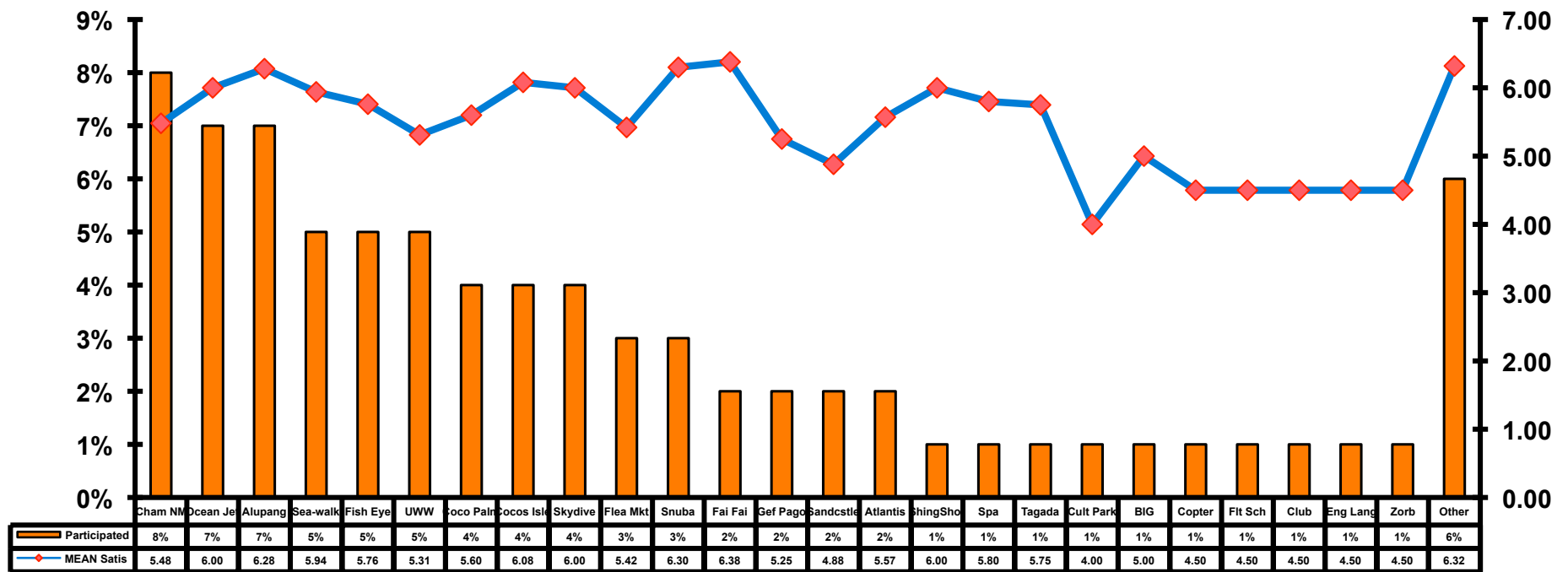
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 54%	Score of 6 to 7 = 49%
Score of 4 to 5 = 42%	Score of 4 to 5 = 44%
Score 1 to 3 = 4%	Score 1 to 3 = 6%
MEAN = 5.43	MEAN = 5.31

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 = 54%	Score of 6 to 7 = 51%
Score of 4 to 5 = 43%	Score of 4 to 5 = 47%
Score 1 to 3 = 3%	Score 1 to 3 = 2%
MEAN = 5.44	MEAN = 5.43

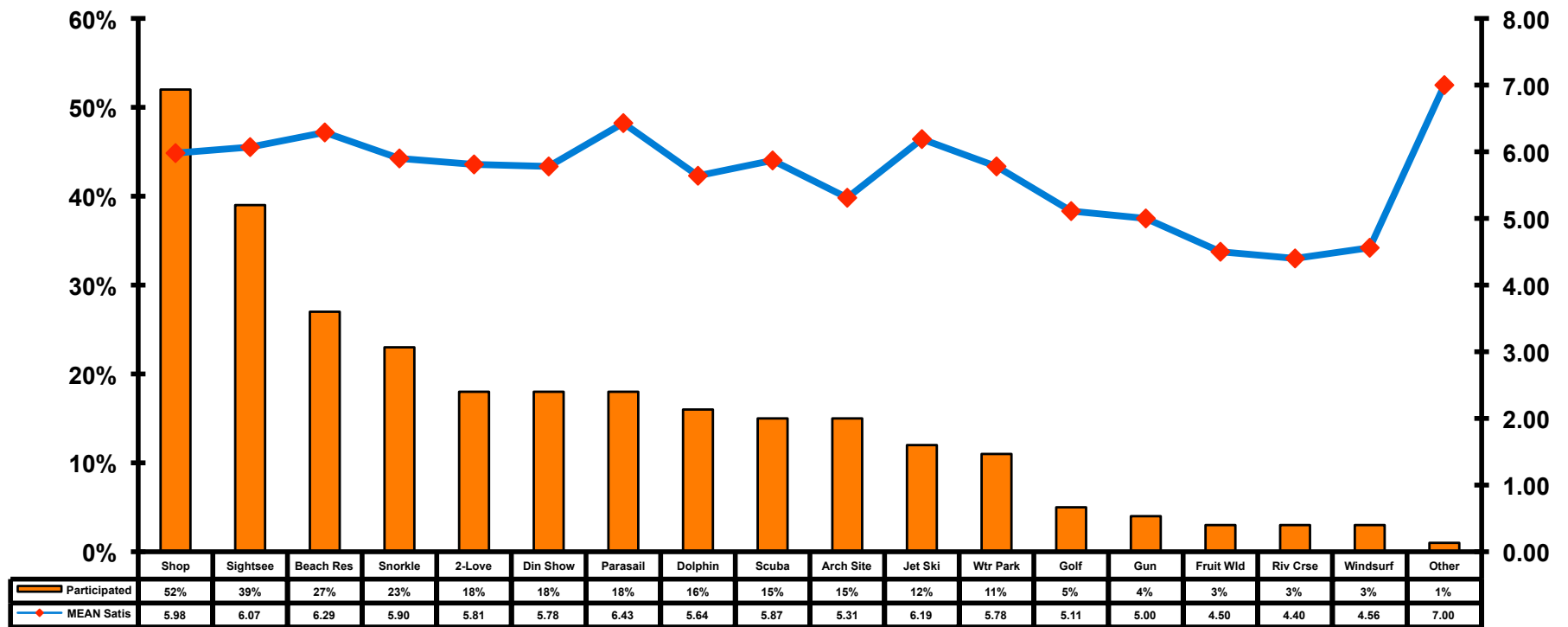
Night Tours Satisfaction

7pt Rating Scale

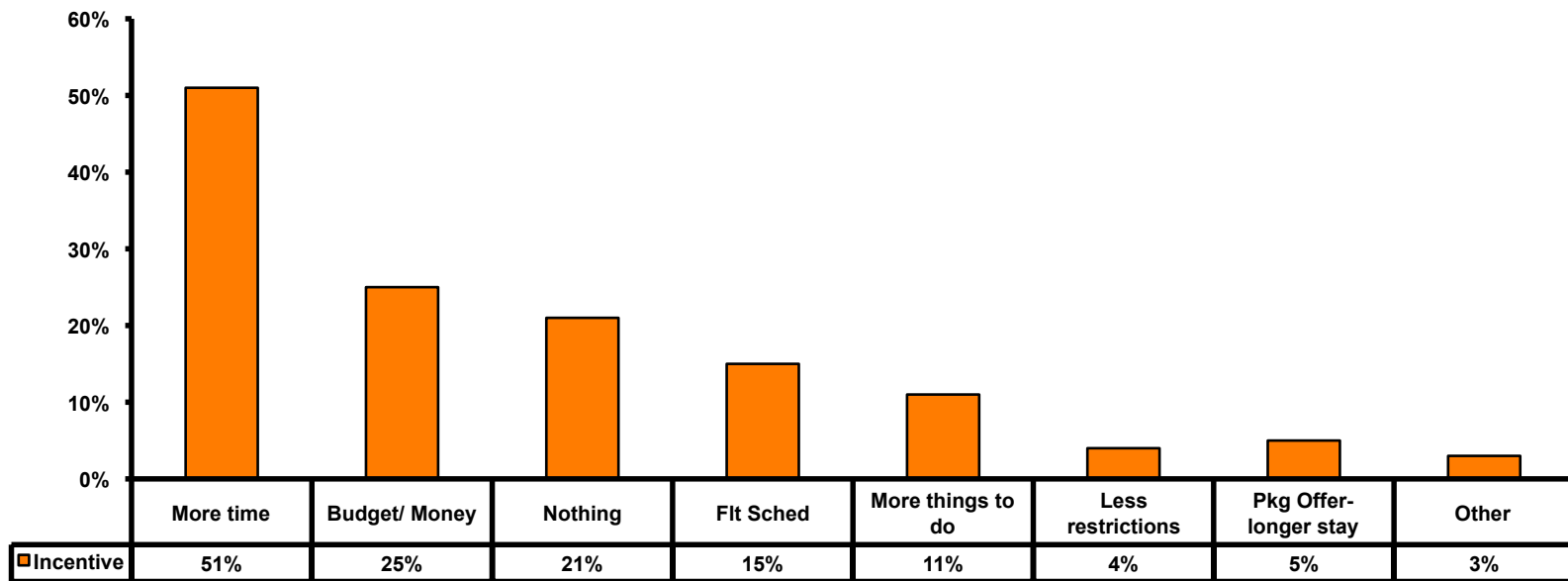
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 28%	Score of 6 to 7 = 29%
Score of 4 to 5 = 69%	Score of 4 to 5 = 66%
Score 1 to 3 = 2%	Score 1 to 3 = 4%
MEAN = 4.81	MEAN = 4.78

Satisfaction with Other Activities



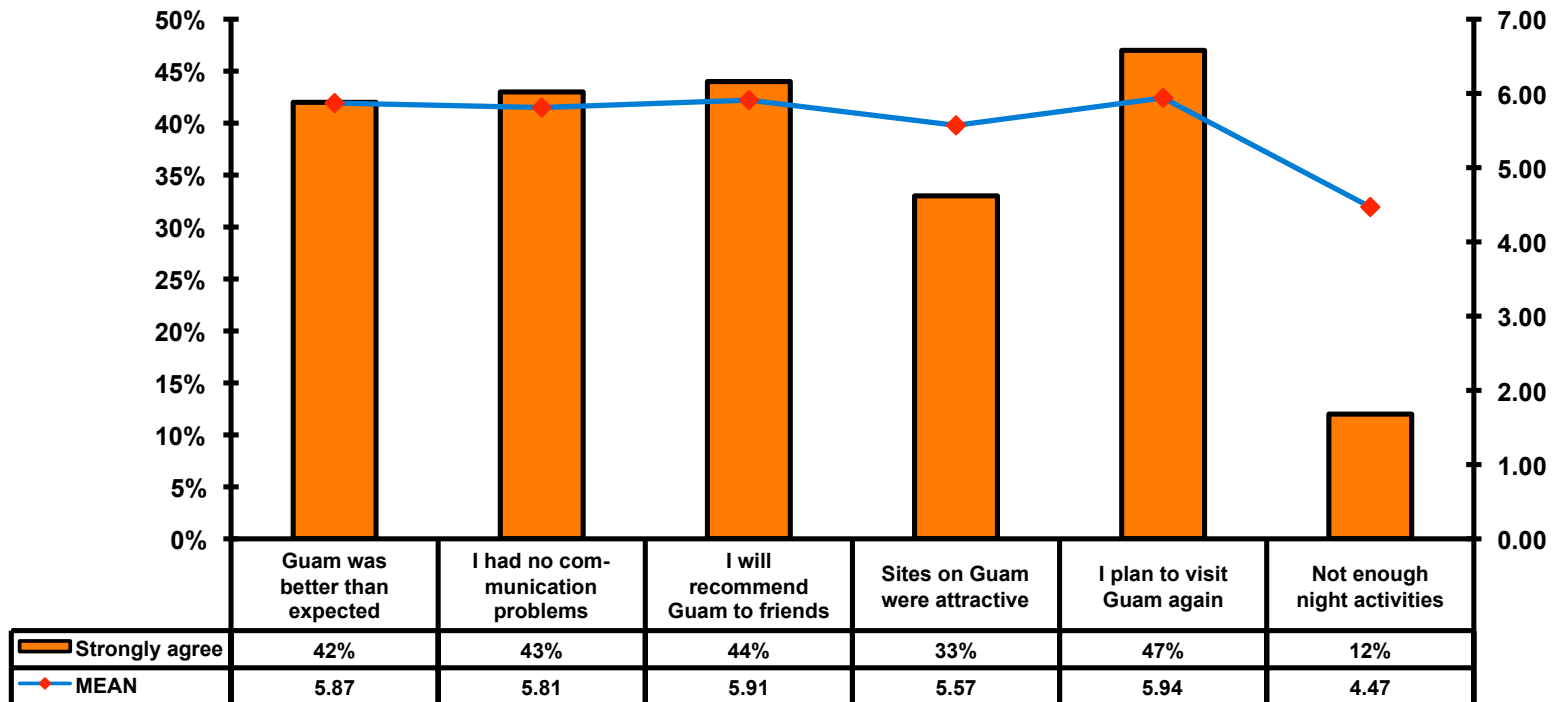
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

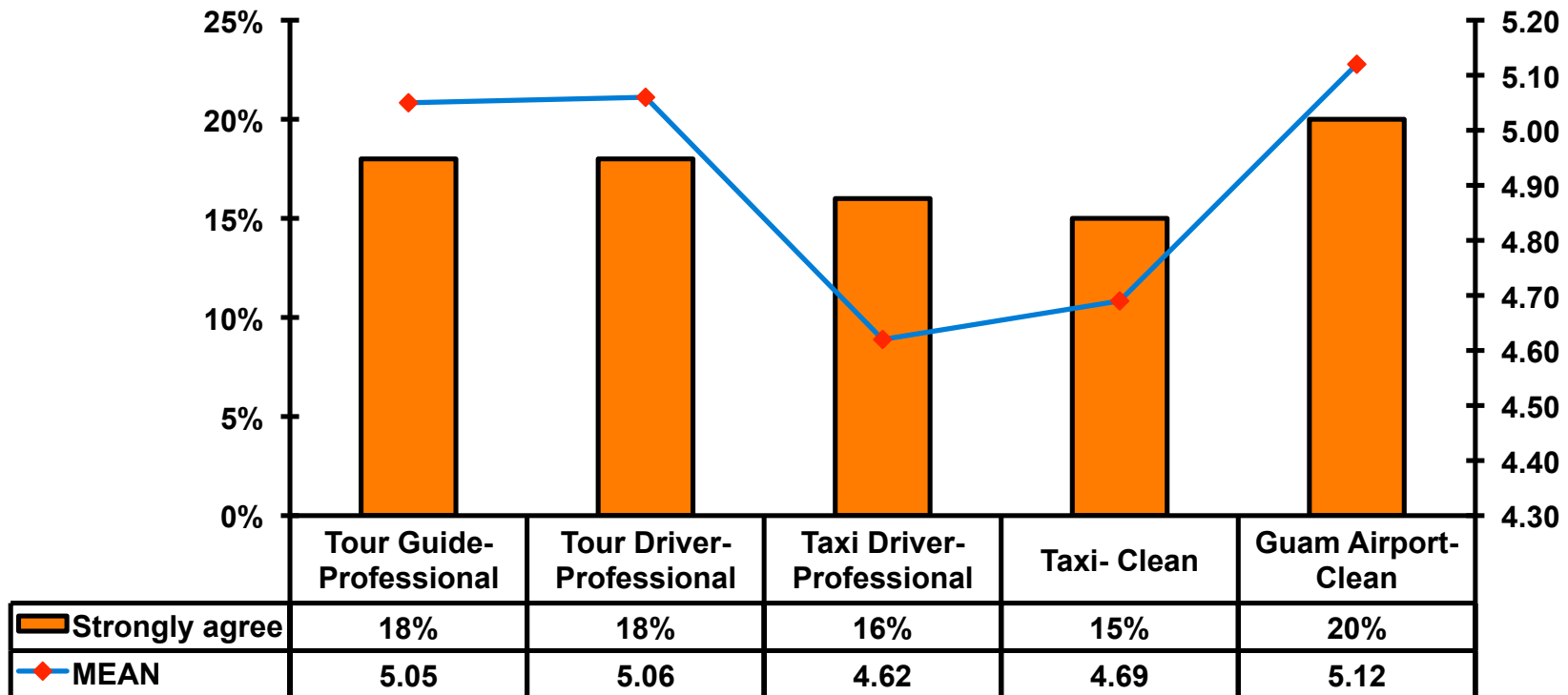
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

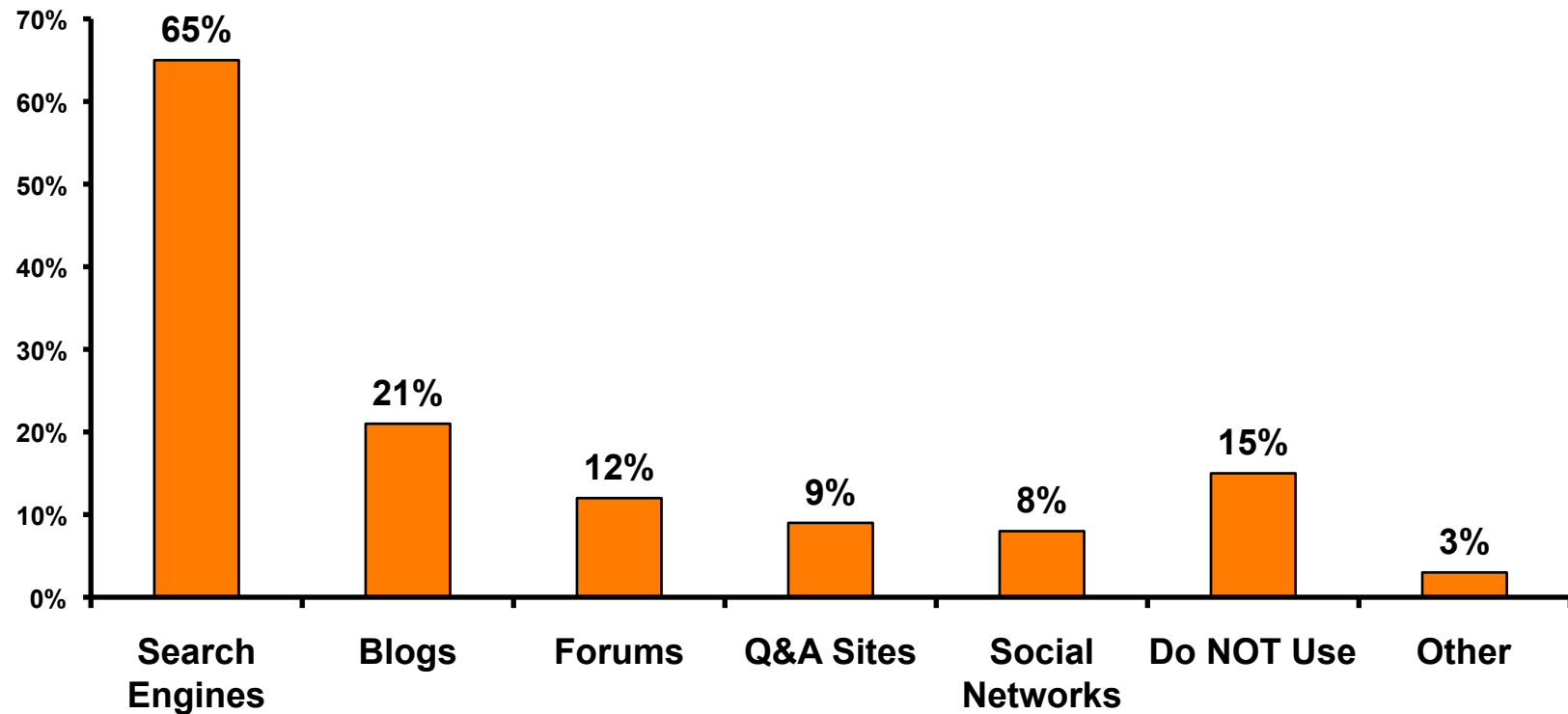
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



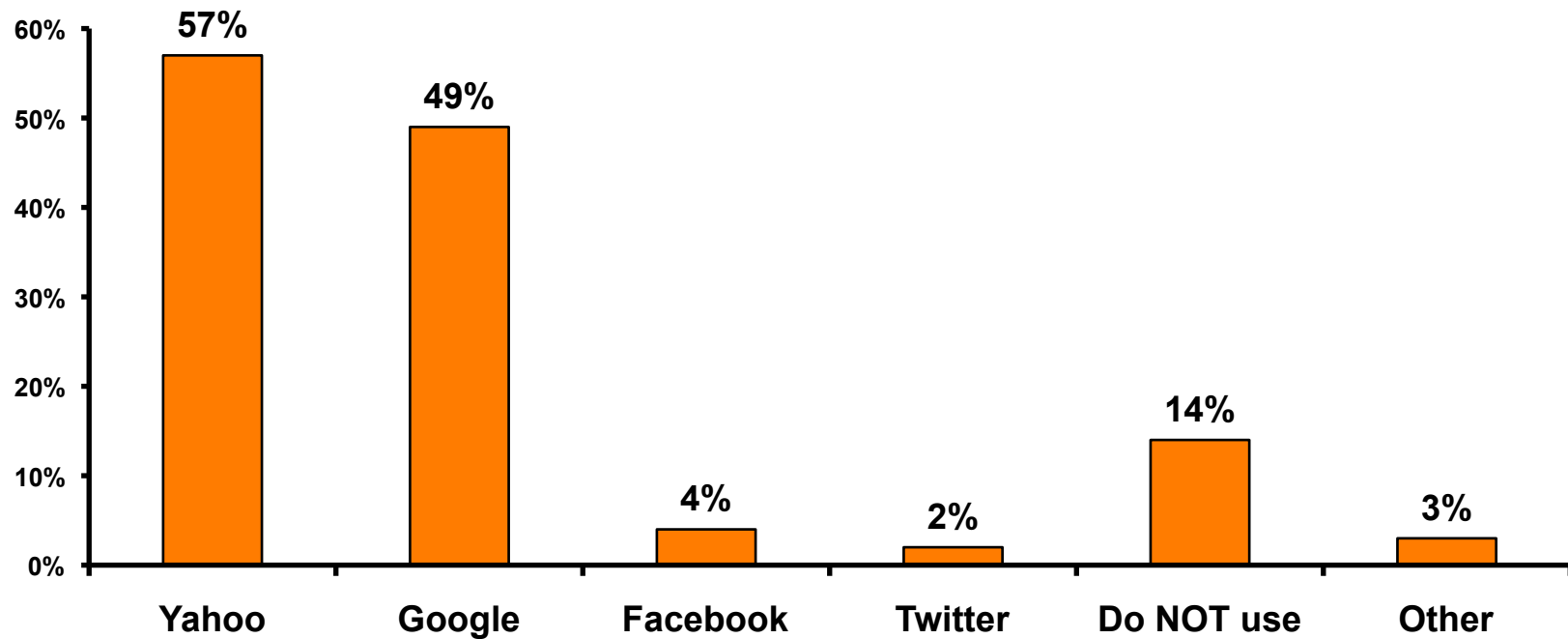
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

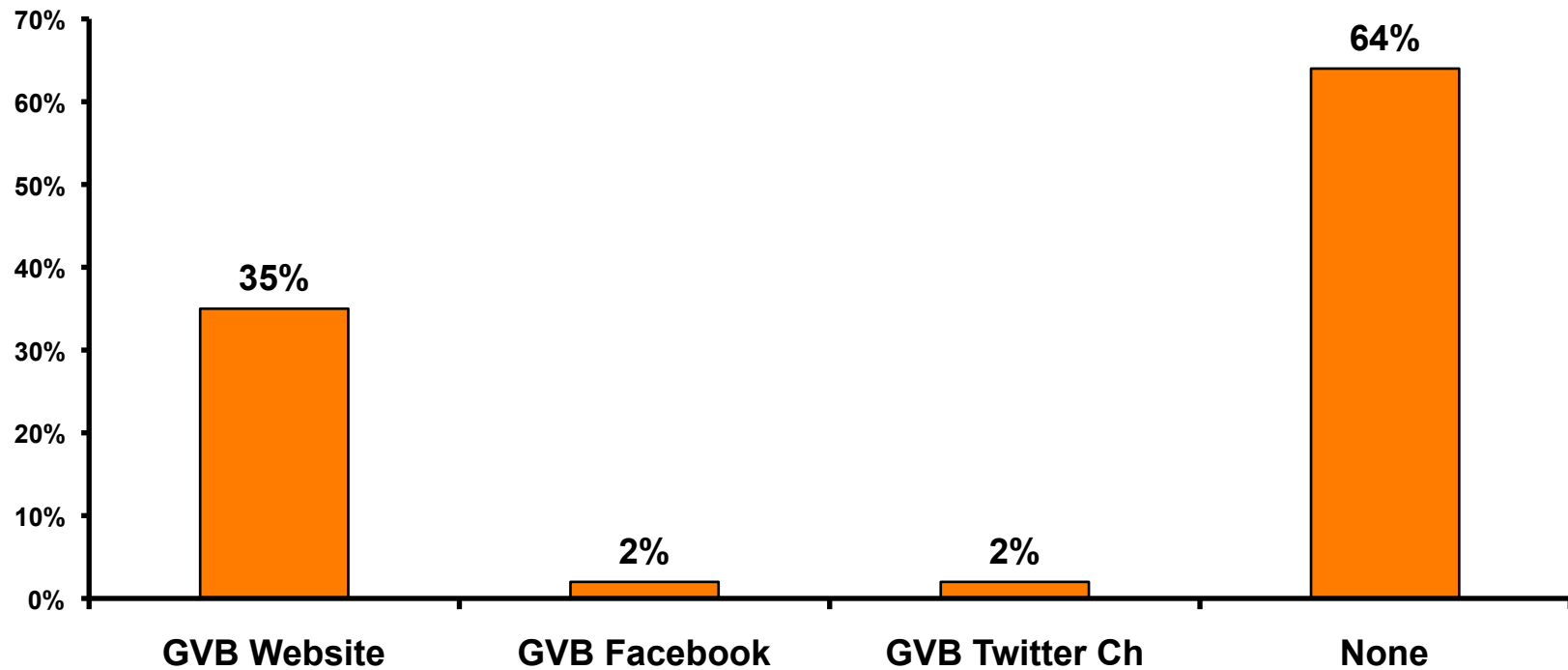


Internet- Things To Do

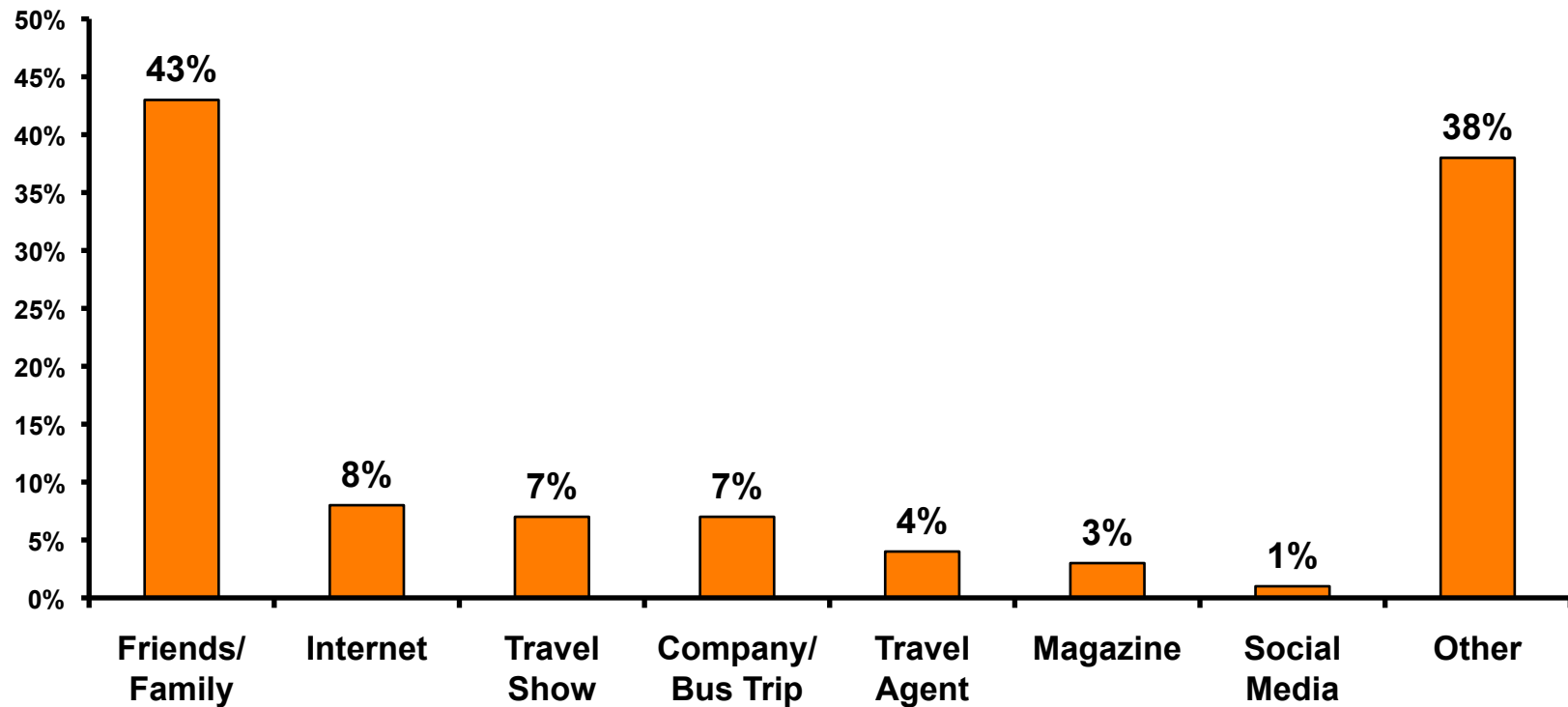
Sources of Info



Internet- GVB Sources

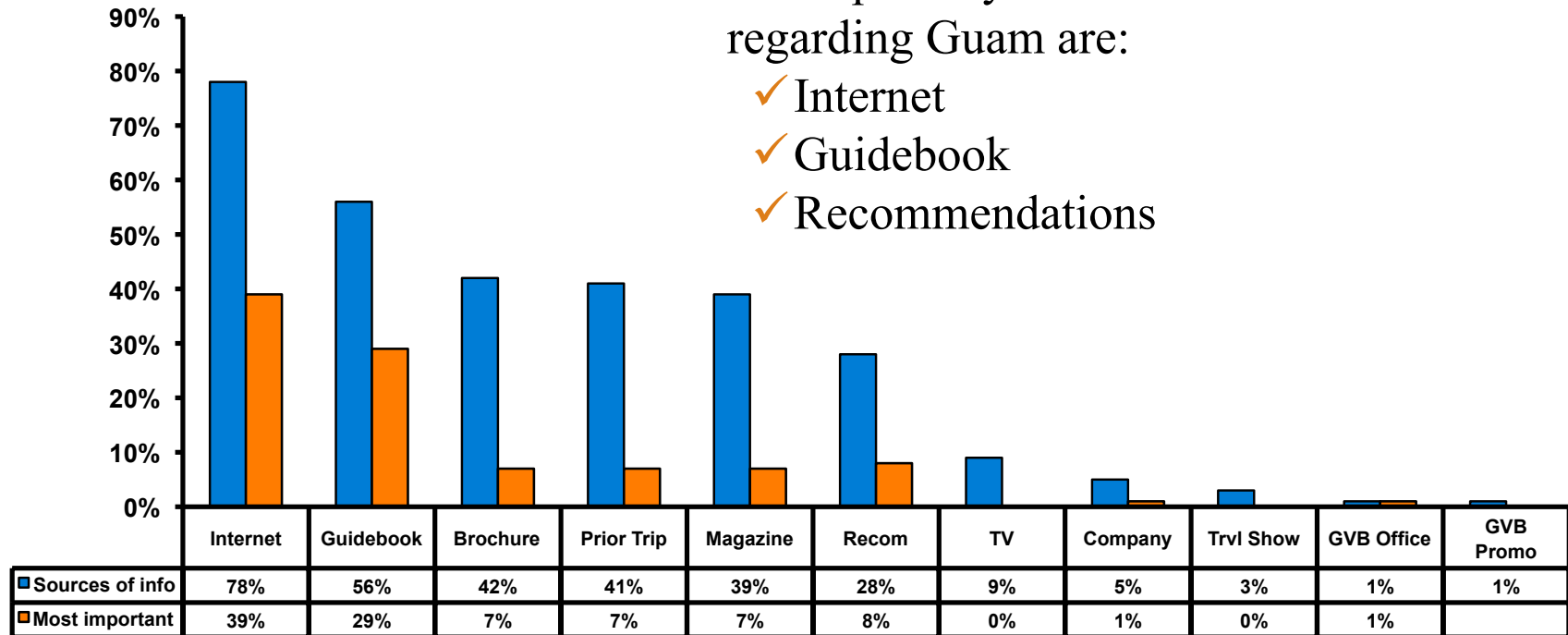


Travel Motivation- Info Sources



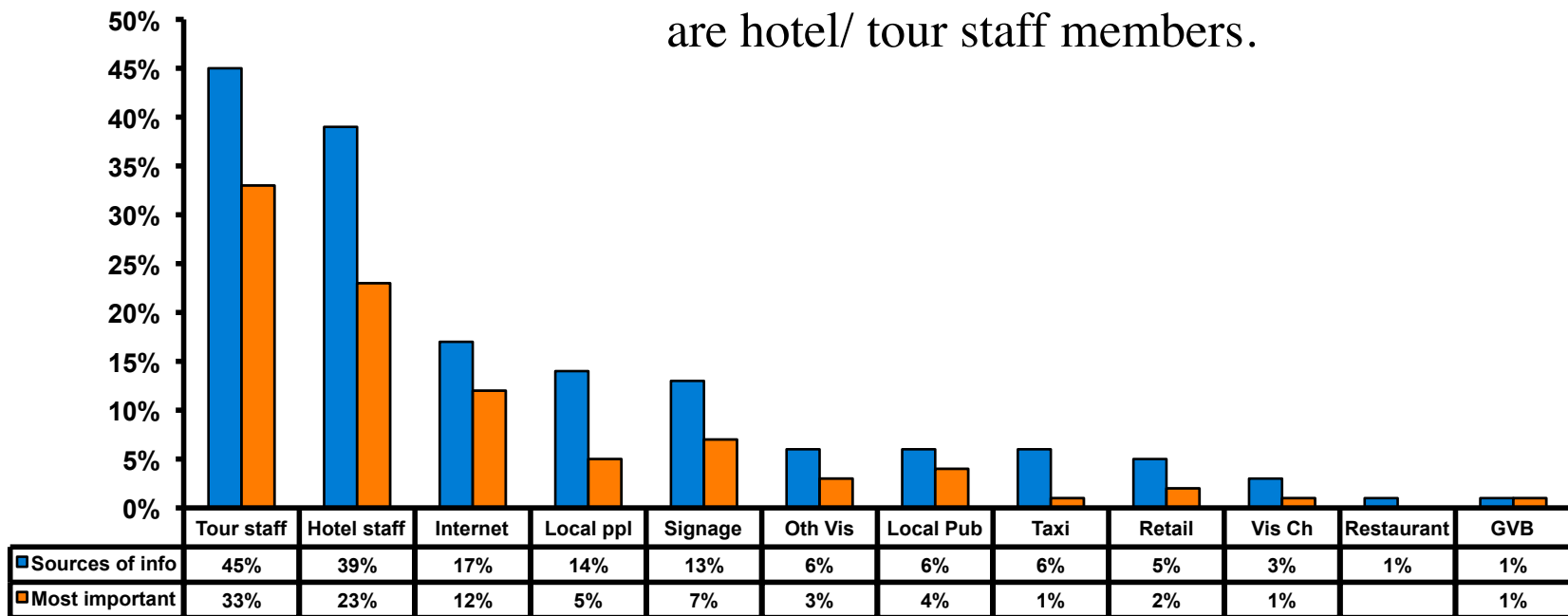
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

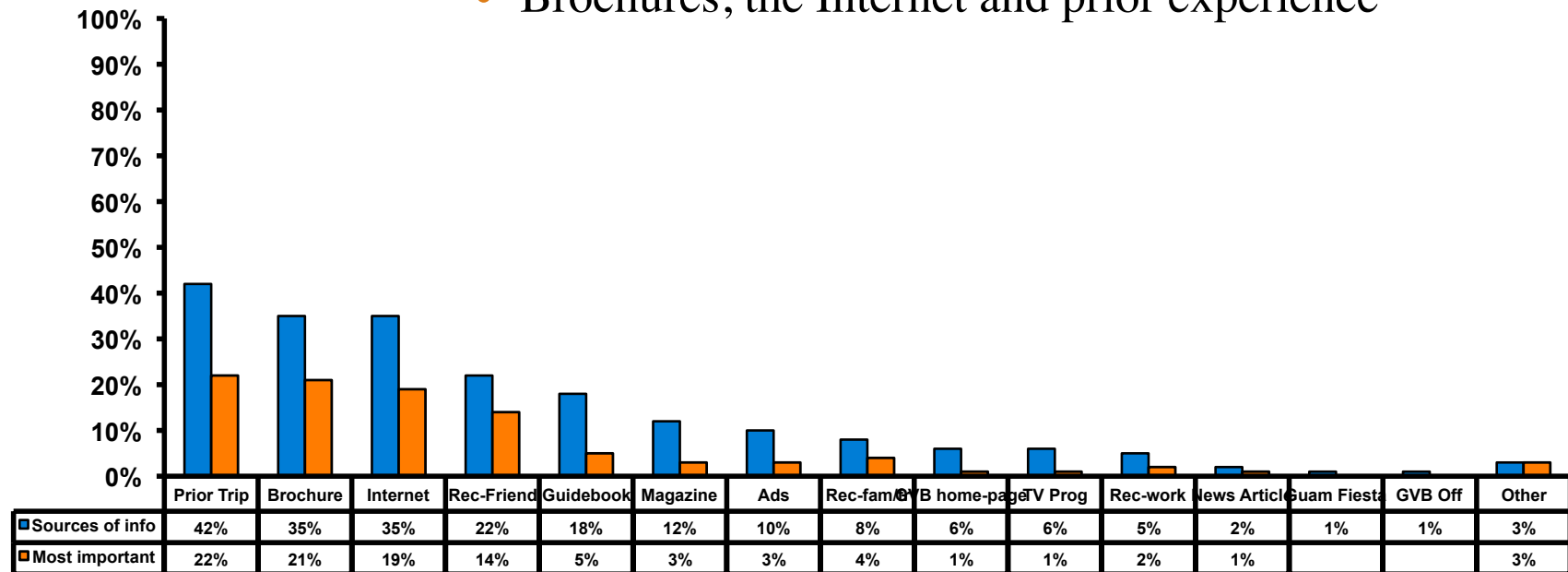
- The primary local source of information are hotel/ tour staff members.



Sources of Information - Motivation

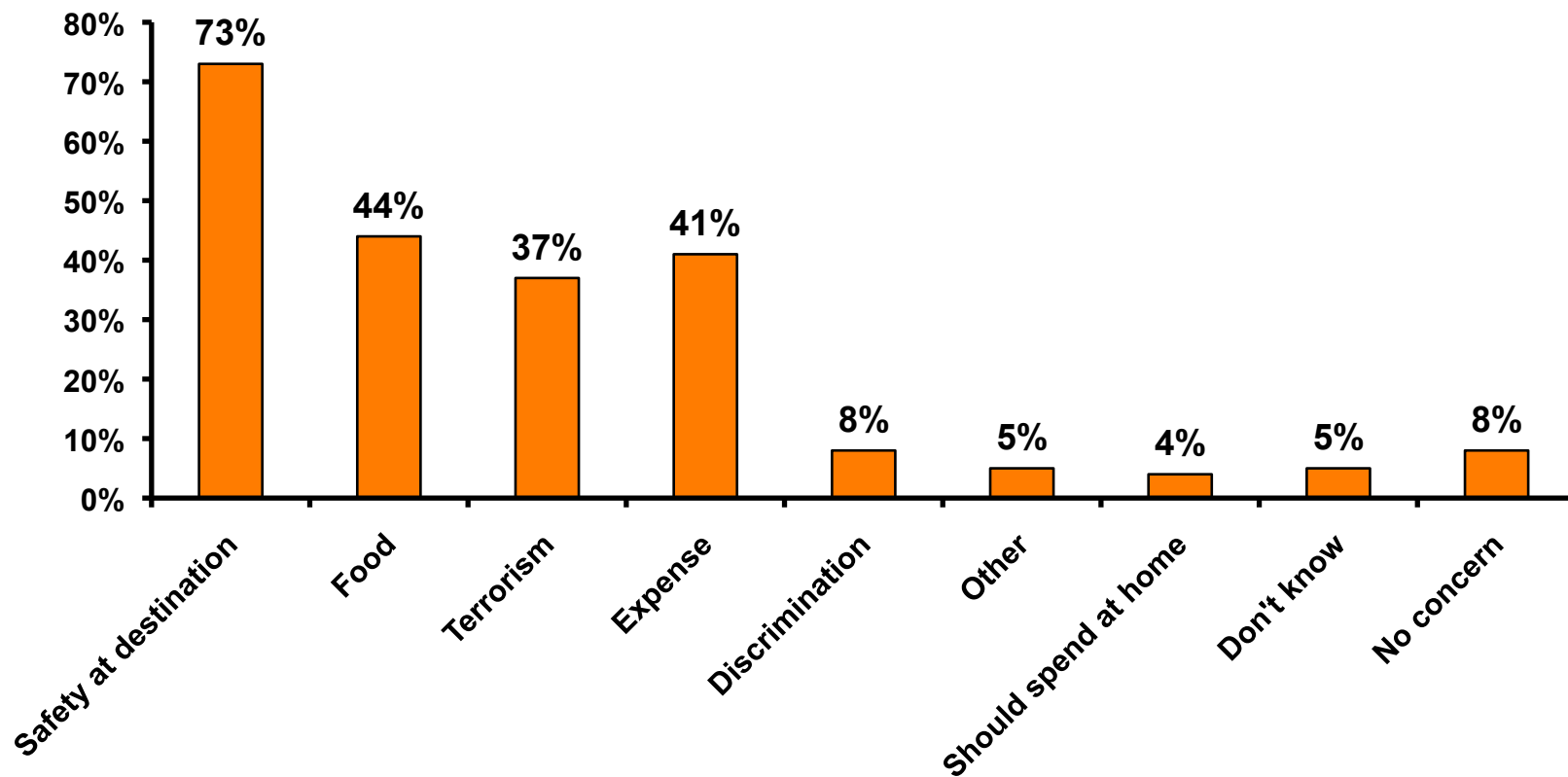
The primary motivational sources of information were.

- Brochures, the Internet and prior experience



SECTION 6 **OTHER ISSUES**

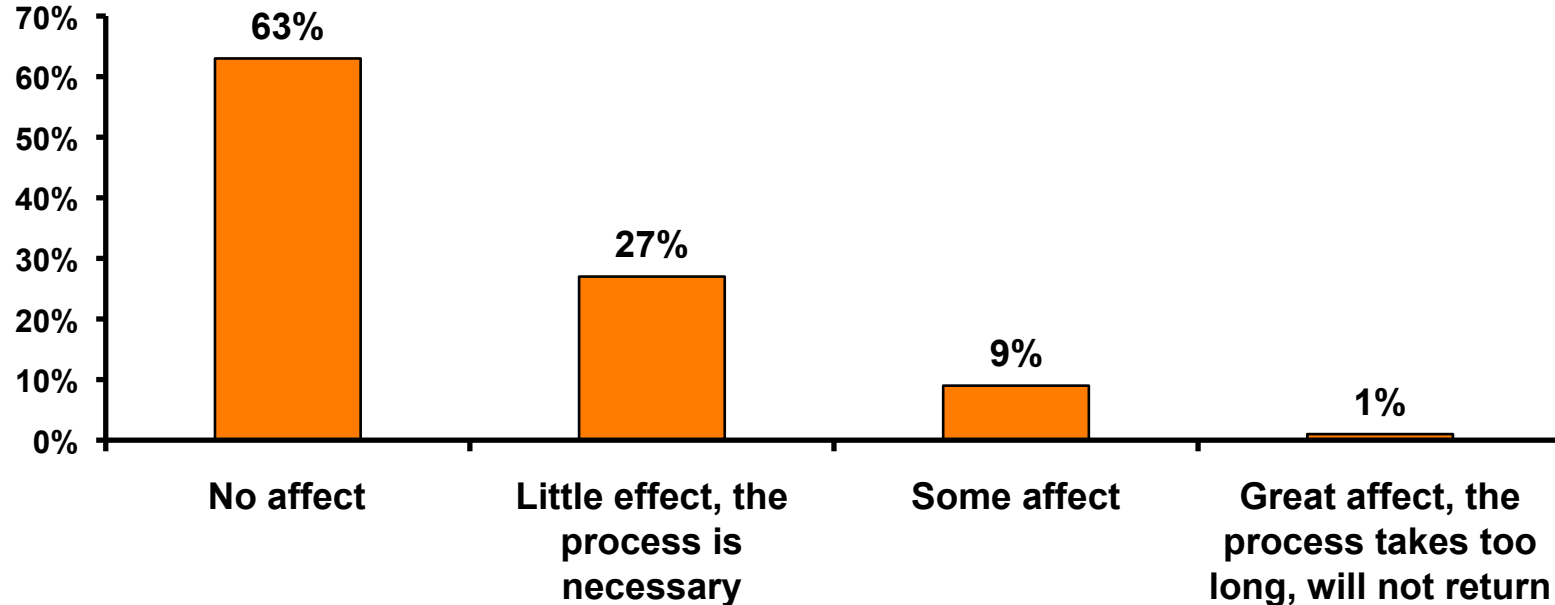
Concerns about travel outside of Japan - Overall



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	73%	70%	75%	75%	71%	65%	73%	72%	83%	71%	83%	74%	67%	
Food	44%	51%	39%	42%	41%	30%	33%	46%	57%	38%	39%	56%	33%	
Expense	41%	41%	41%	46%	26%	22%	55%	41%	45%	50%	34%	40%	22%	
Terrorism	37%	31%	38%	45%	32%	22%	33%	49%	40%	33%	49%	44%	22%	
Discrimination against Japanese	8%	8%	6%	8%	9%	13%	3%	5%	9%	12%	7%	10%		
No concerns	8%	3%	8%	8%	21%	9%	6%	10%	4%	12%	5%	10%		
Other	5%	7%	6%	4%	3%	13%	6%	5%	2%	5%	5%	4%	11%	
Don't know	5%	8%	3%	4%		4%		5%	2%	3%	2%	2%	11%	
Should spend at home	4%	5%	4%	4%	6%	13%	3%		6%	5%	2%	6%		
Total	Count	350	106	101	106	34	23	33	39	47	58	41	50	9

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

