



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2013

### JULY 2013



**Prepared by: QMark Research**

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# Background & Methodology

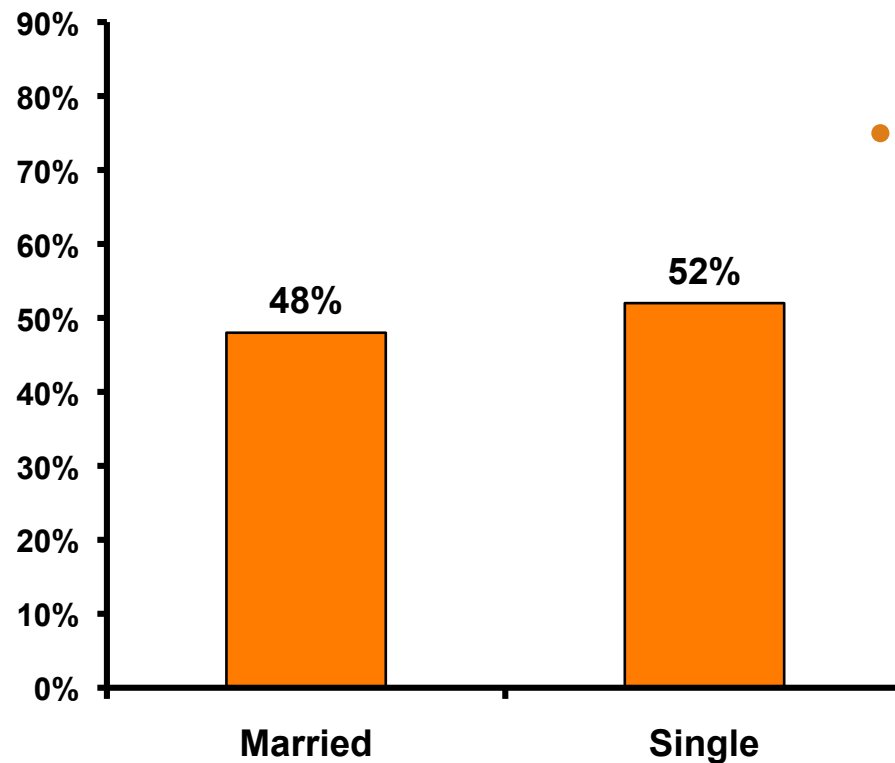
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing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

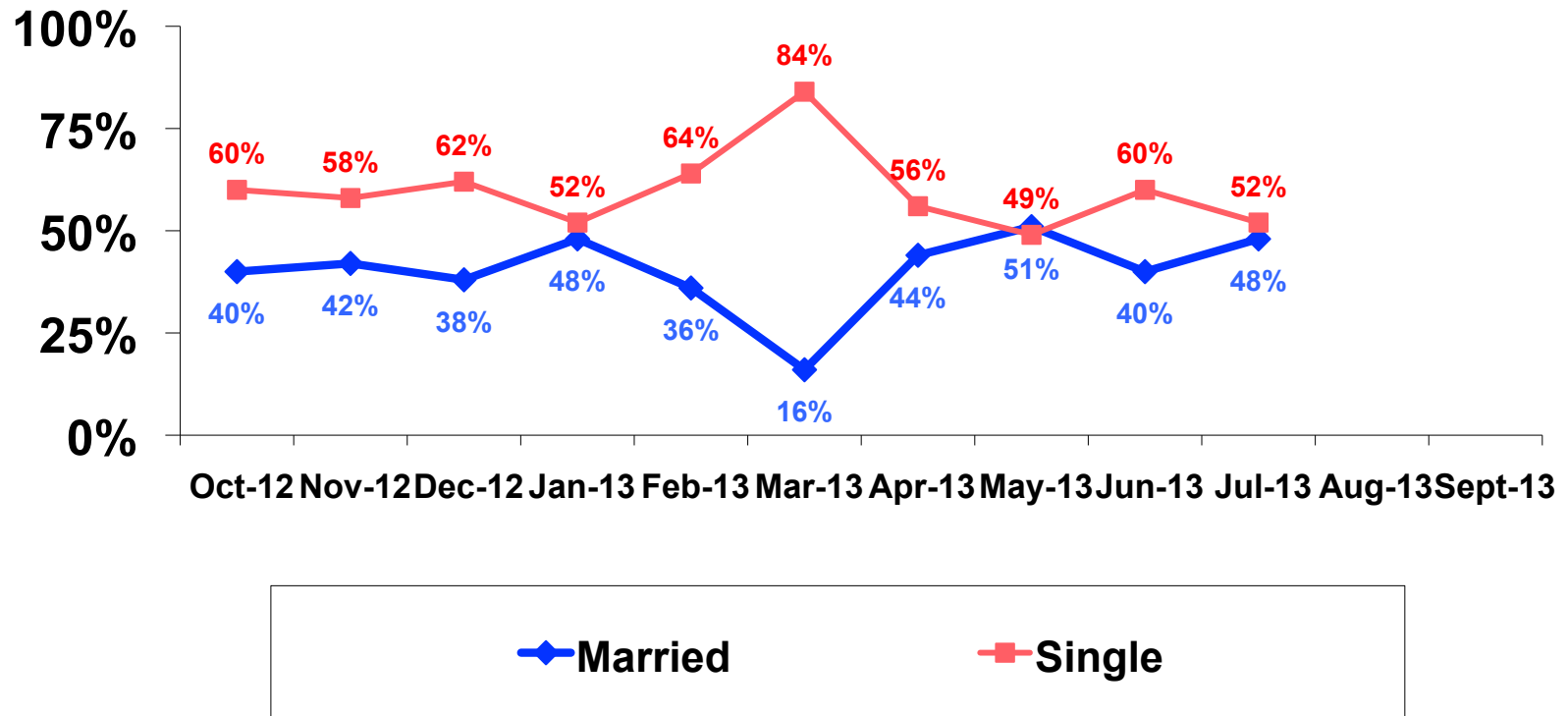
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

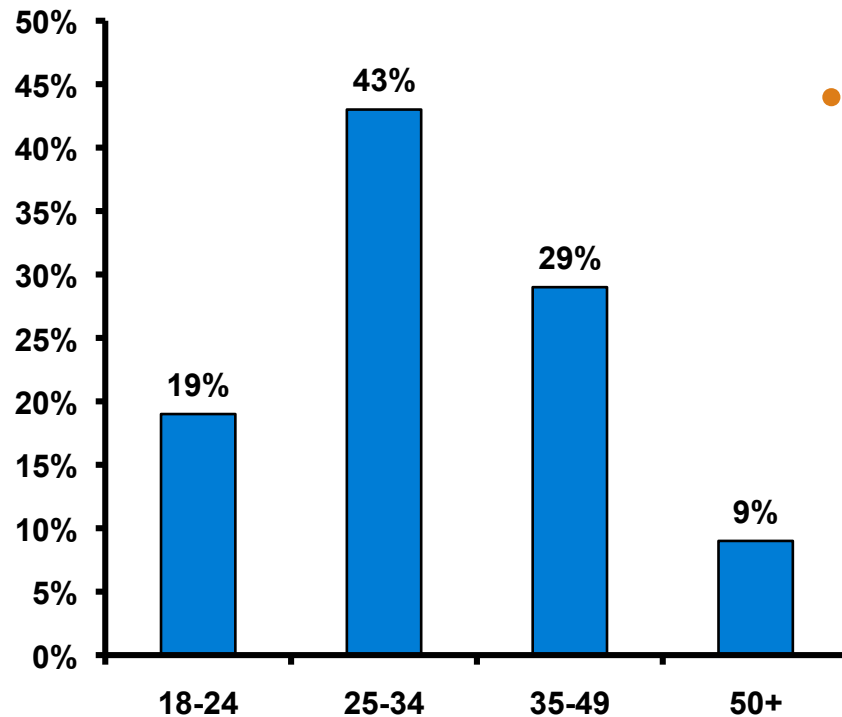


- 73% of female visitors are single.

# Marital Status

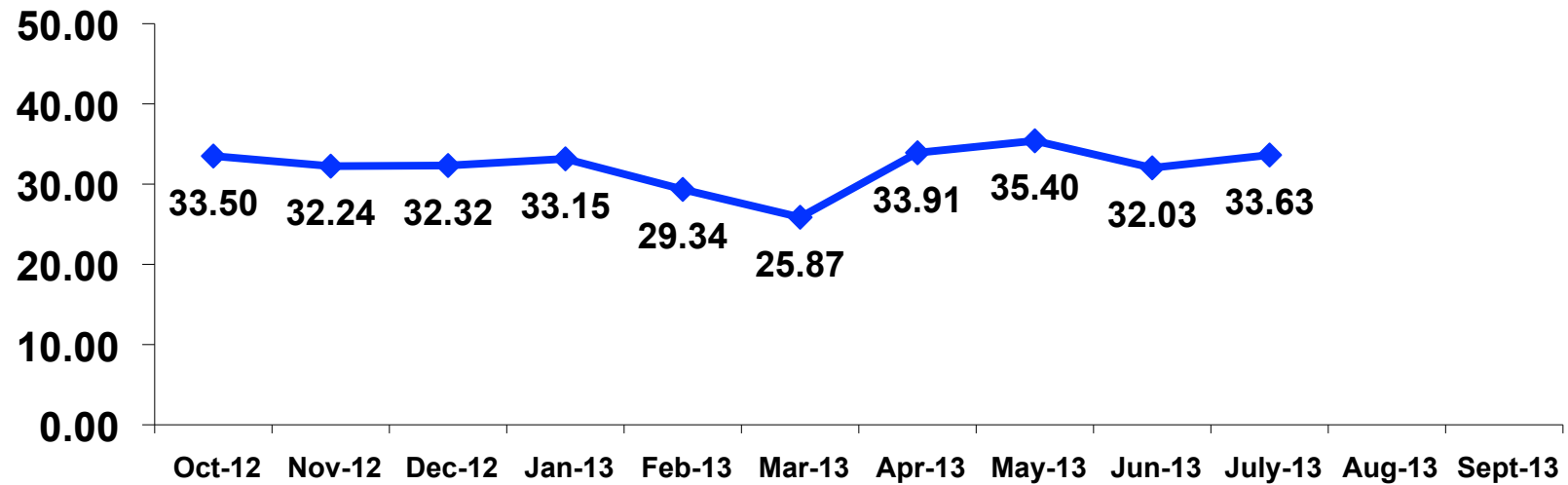


# Age - Overall



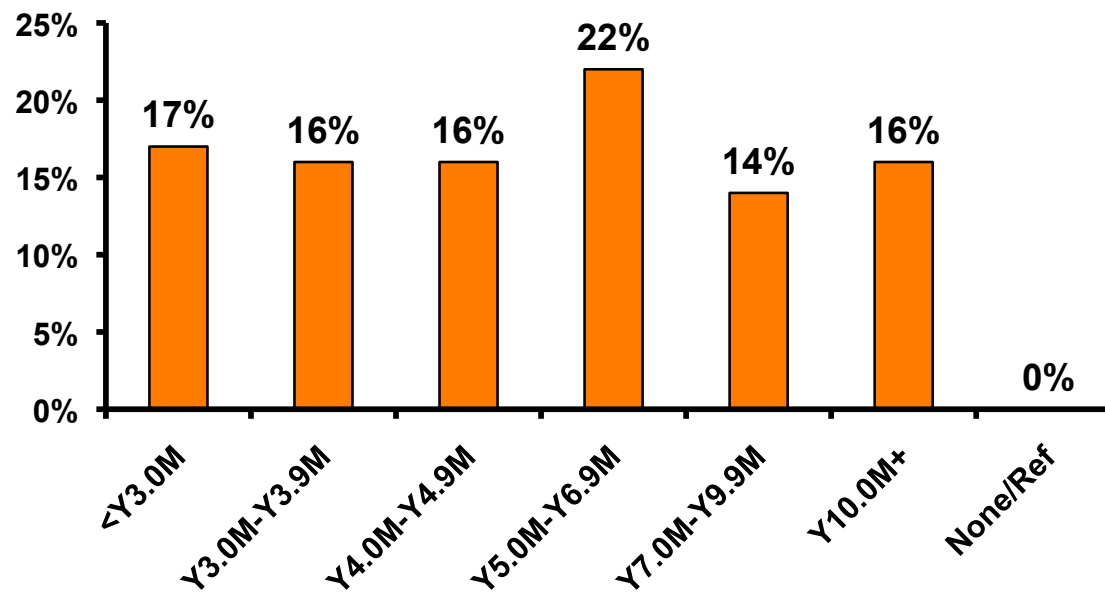
- The average age of the respondents is 33.63 years of age.

# Average Age



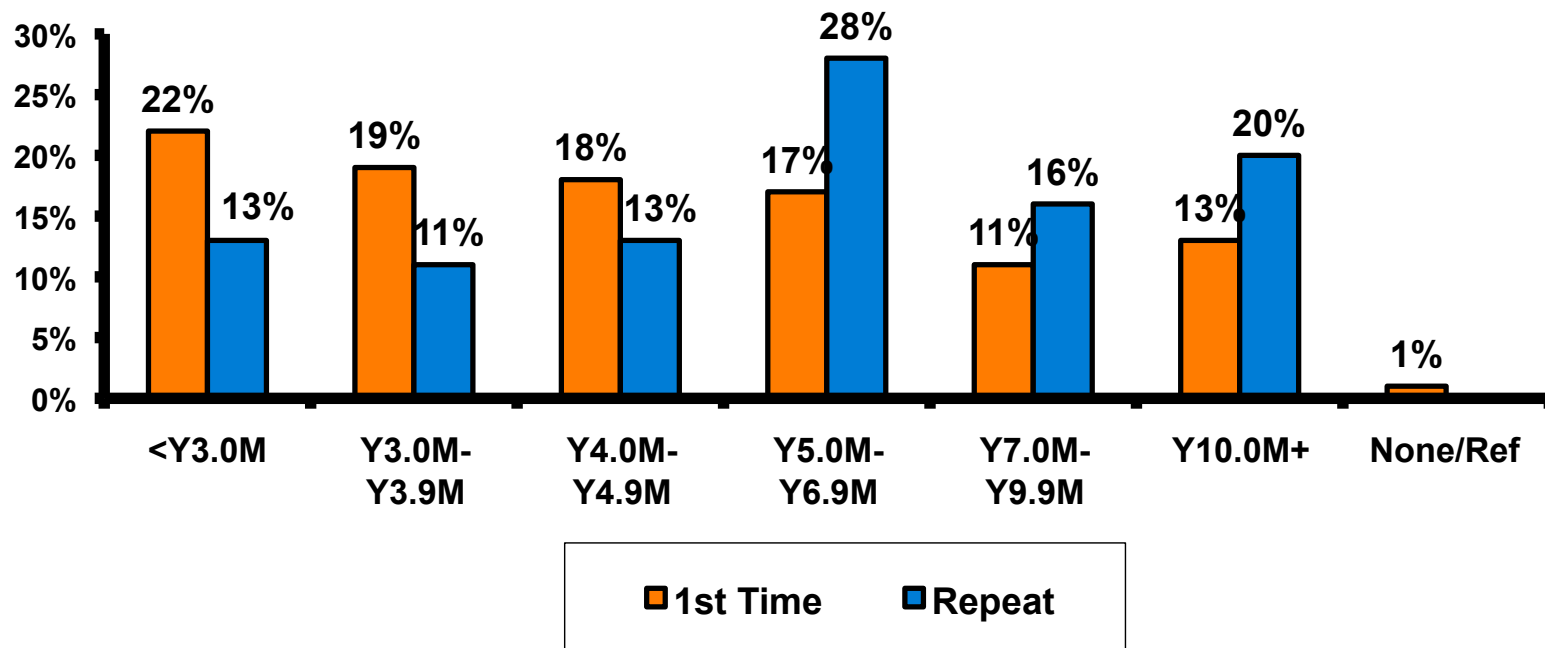


# Personal Income



• ¥100.03=\$1

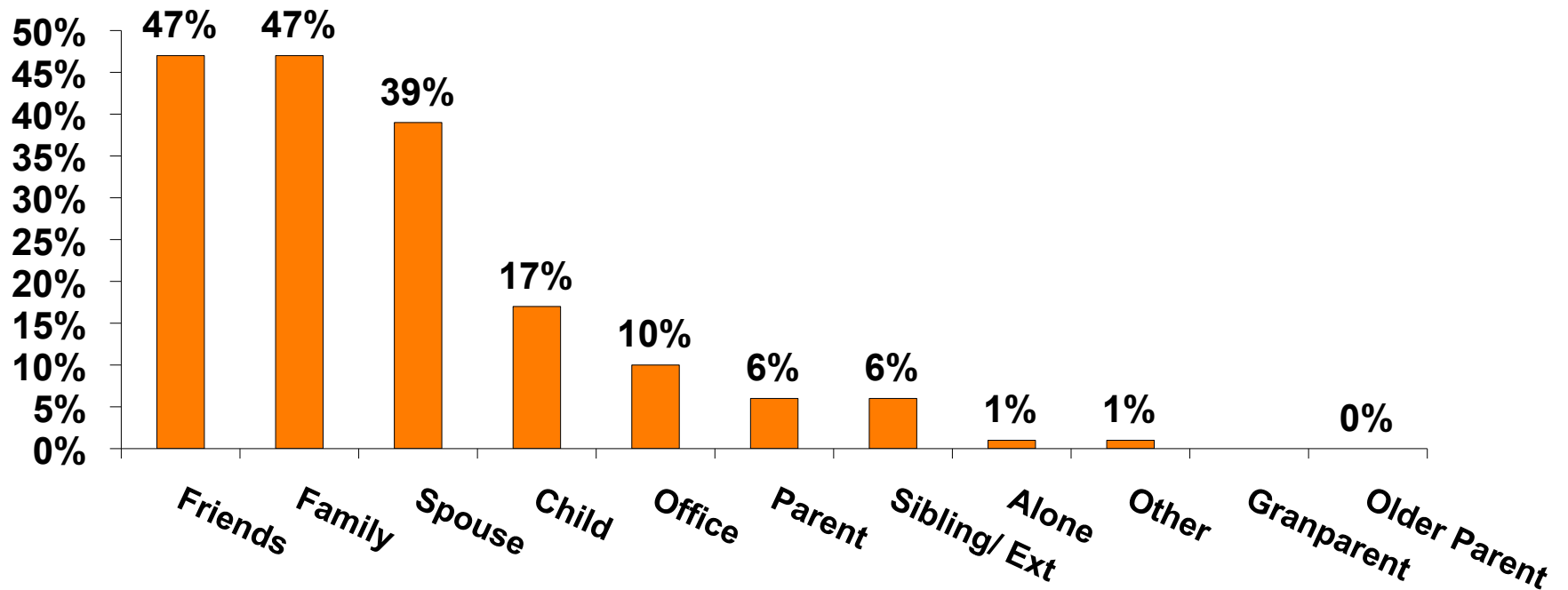
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	14	2	12	5	8	1	
		Column N %	4%	1%	8%	9%	6%	1%	
	Y2.0M-Y3.0M	Count	42	13	29	15	19	5	2
		Column N %	13%	8%	20%	26%	15%	5%	7%
	Y3.0M-Y4.0M	Count	49	20	29	10	29	8	2
		Column N %	16%	12%	20%	17%	22%	8%	7%
	Y4.0M-Y5.0M	Count	49	28	21	5	24	12	7
		Column N %	16%	17%	14%	9%	18%	13%	23%
	Y5.0M-Y7.0M	Count	68	39	29	6	21	34	7
		Column N %	22%	23%	20%	10%	16%	35%	23%
	Y7.0M-Y10.0M	Count	43	37	6	4	13	17	9
		Column N %	14%	22%	4%	7%	10%	18%	30%
	Y10.0M+	Count	50	29	21	12	16	19	3
		Column N %	16%	17%	14%	21%	12%	20%	10%
	No Income	Count	1	1		1			
		Column N %	0%	1%		2%			
	Total	Count	316	169	147	58	130	96	30

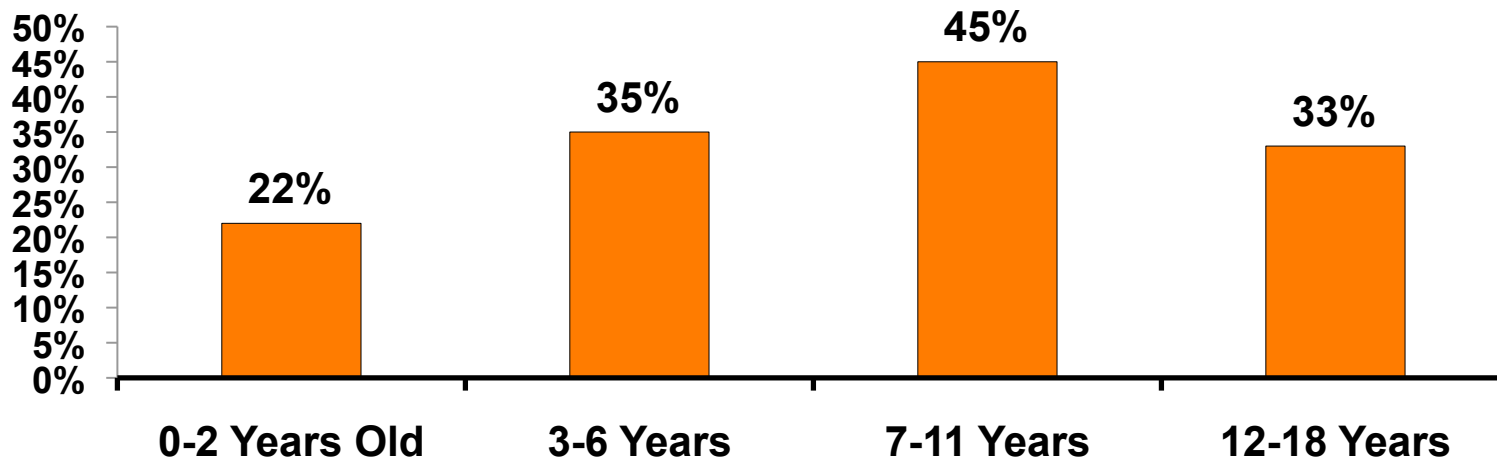
# Travel Companions



# Number of Children Travel Party

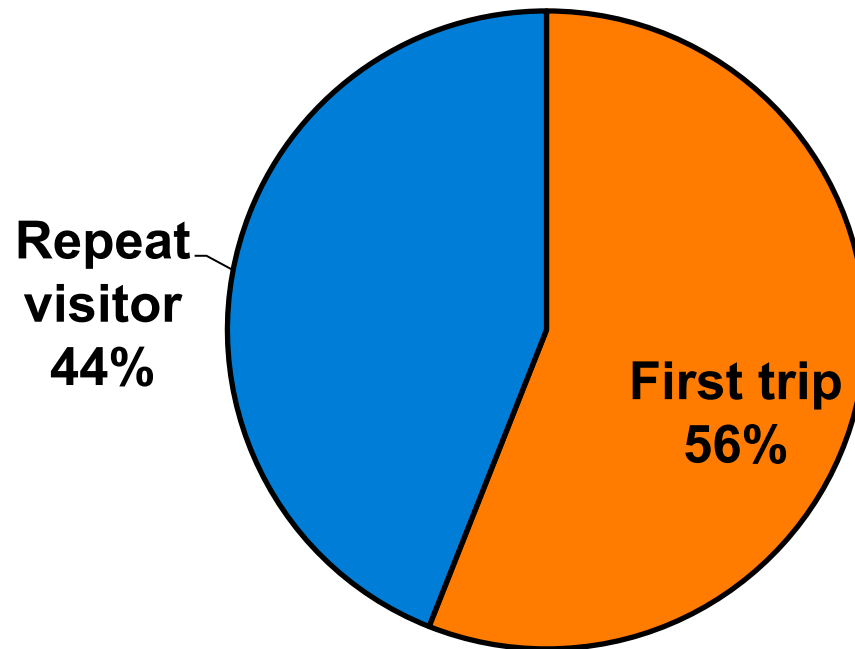
N=60 total respondents traveling with children.

(Of those N=60 respondents, there is a total of 91 children 18 years or younger)

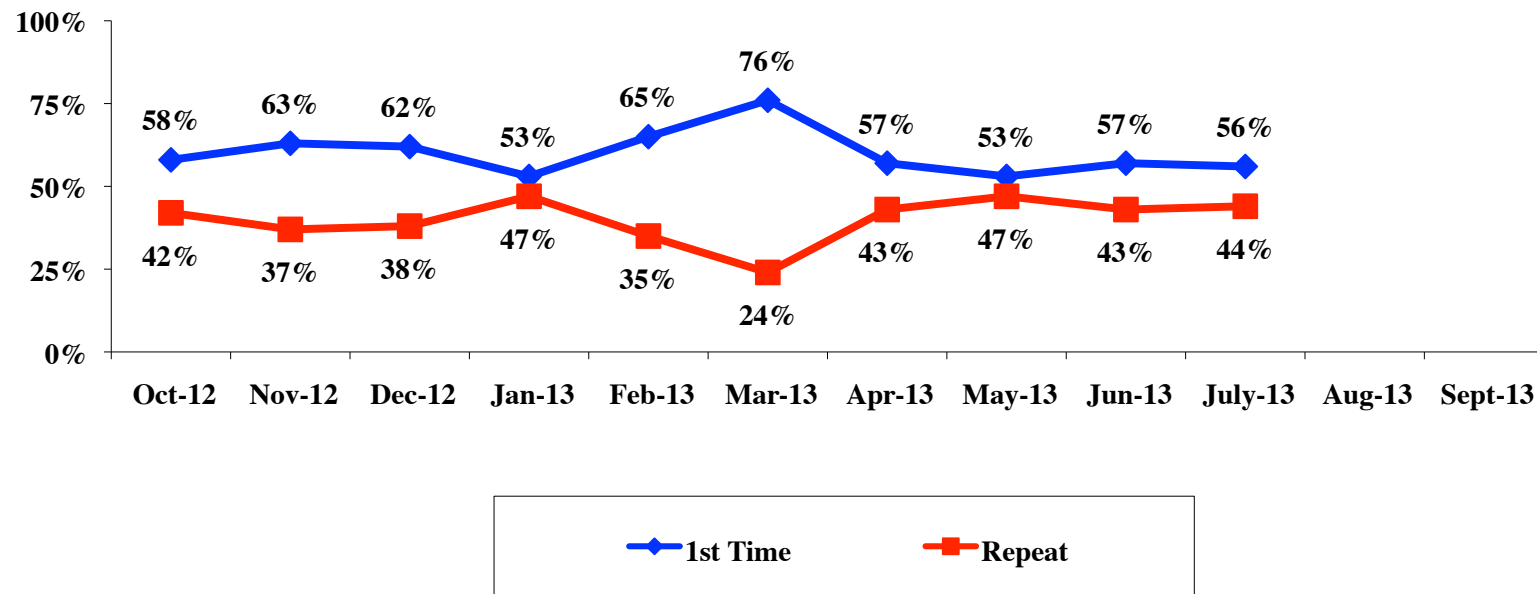


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# Prior Trips to Guam



# Prior Trips to Guam



# Trips to Guam by Age & Gender

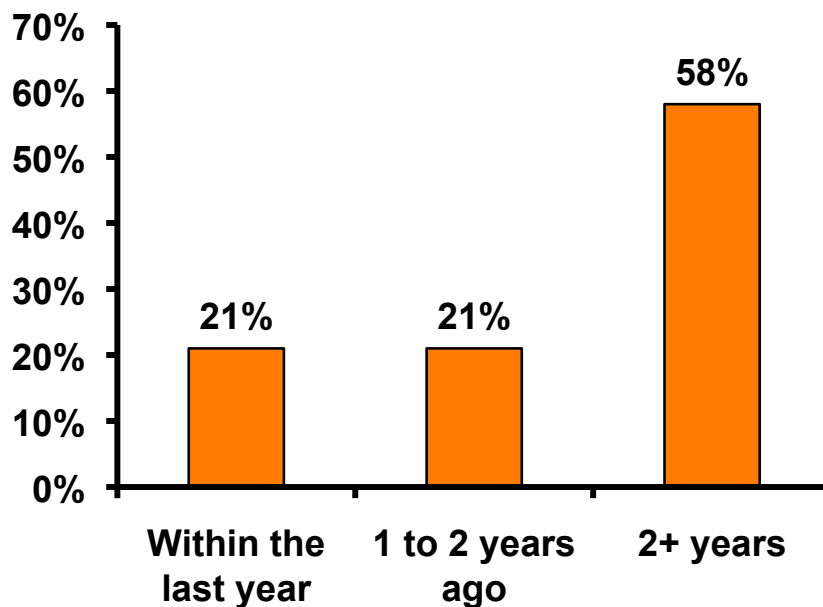
			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	180	92	88
		Column N %	51%	47%	57%
	Female	Count	172	105	67
		Column N %	49%	53%	43%
	Total	Count	352	197	155
AGE	18-24	Count	68	50	18
		Column N %	19%	26%	12%
	25-34	Count	149	96	53
		Column N %	43%	49%	34%
	35-49	Count	100	37	63
		Column N %	29%	19%	41%
	50+	Count	33	13	20
		Column N %	9%	7%	13%
	Total	Count	350	196	154

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



# Repeat Visitors Last Trip

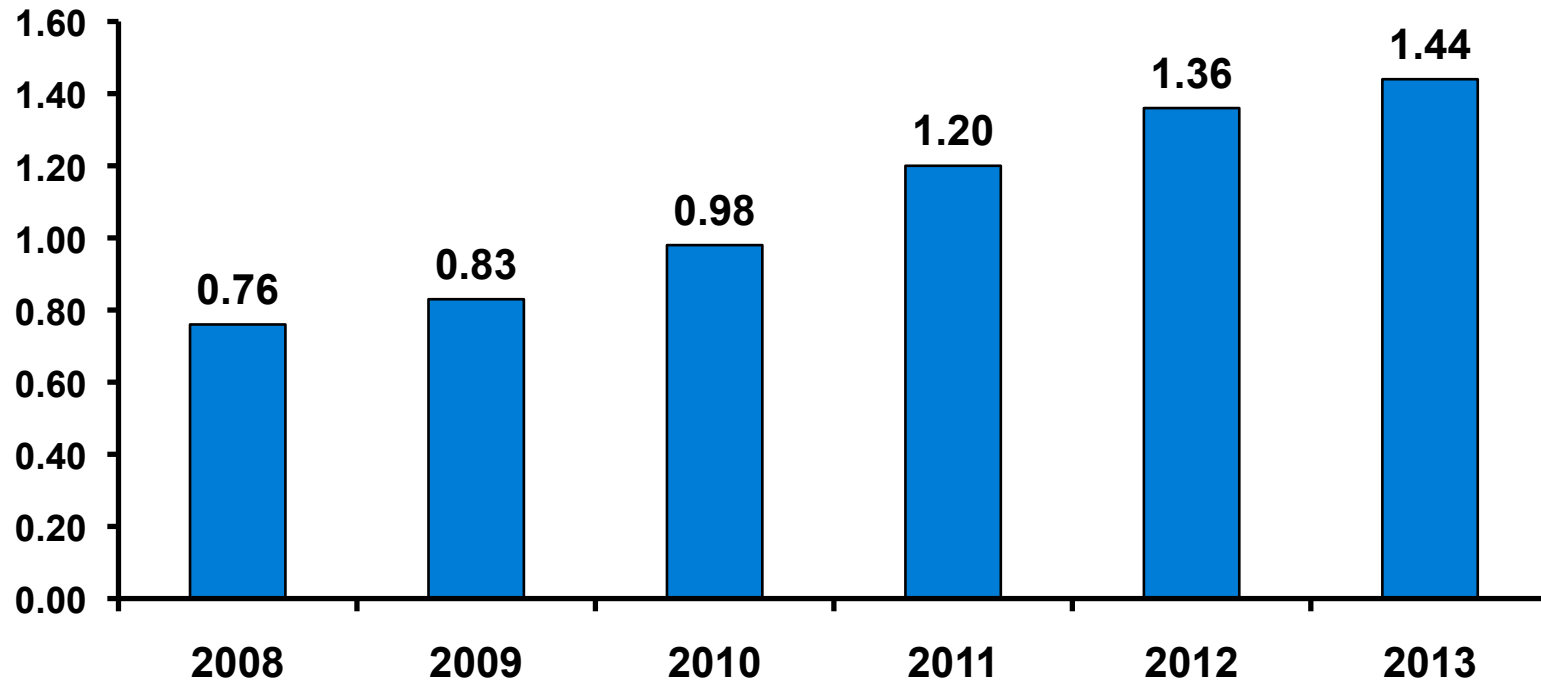
n = 154



- The average repeat visitor has been to Guam 2.68 times.
- Less than half the repeat visitors have been to Guam within the last 2 years.

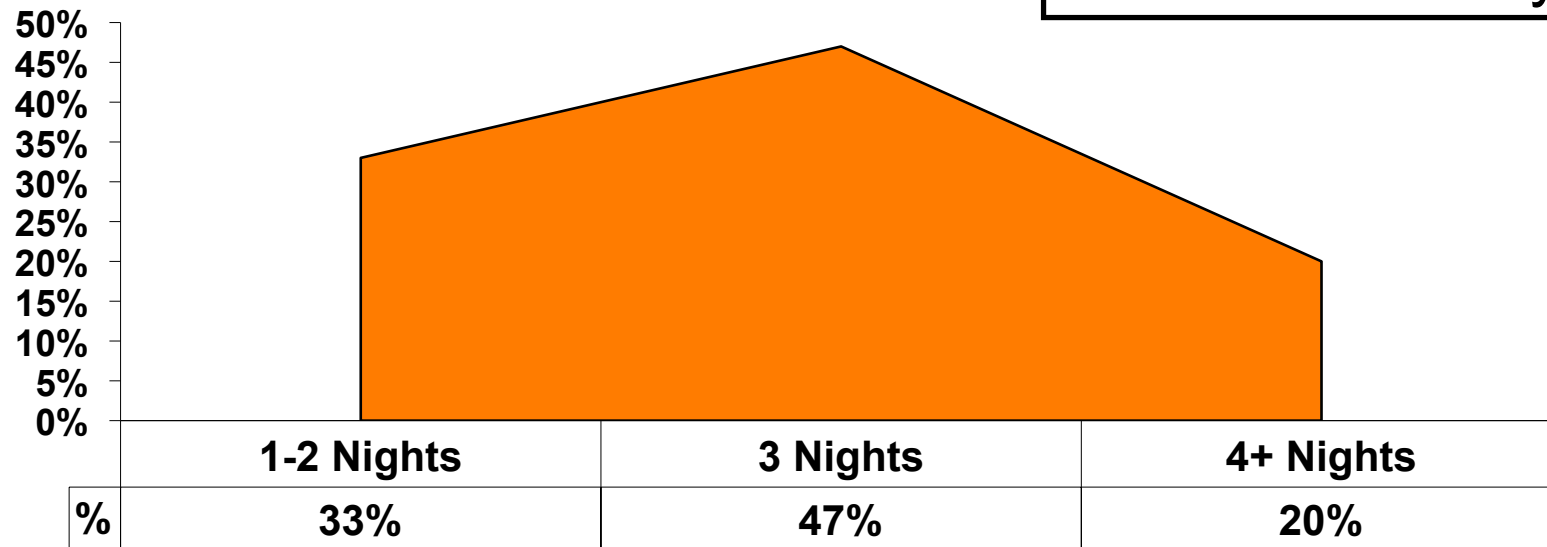
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# Average Number Overnight Trips (2008-2013) (2 nights or more)

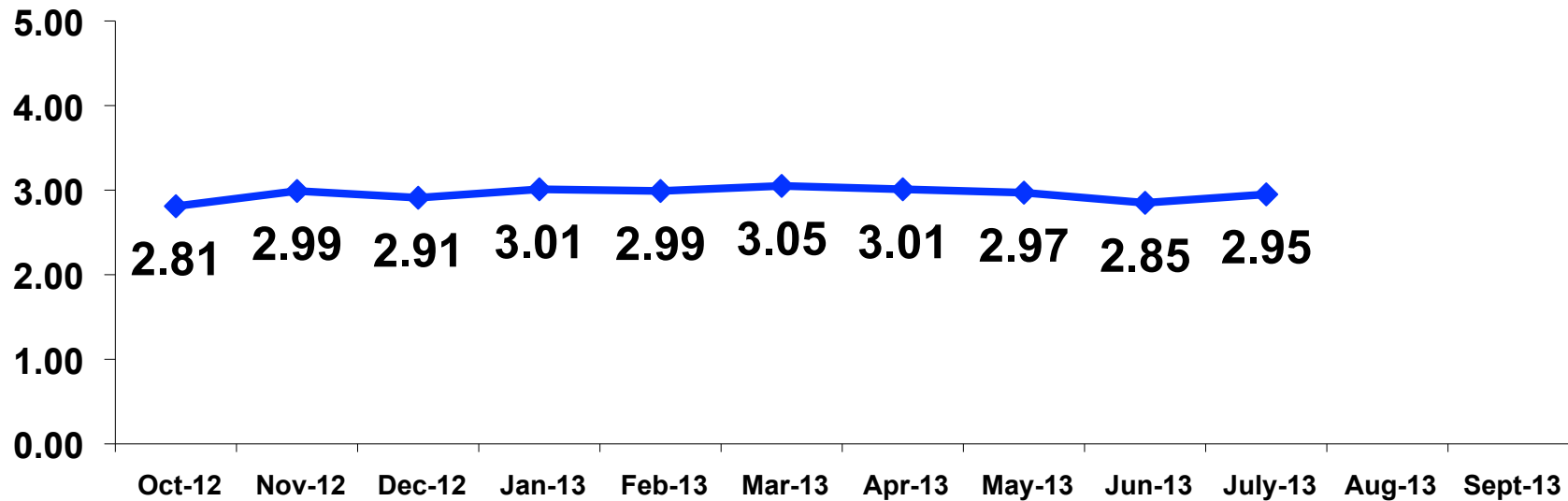


# Length of Stay

Mean = 2.95 Days  
Median = 3.0 Days



# Average Length of Stay

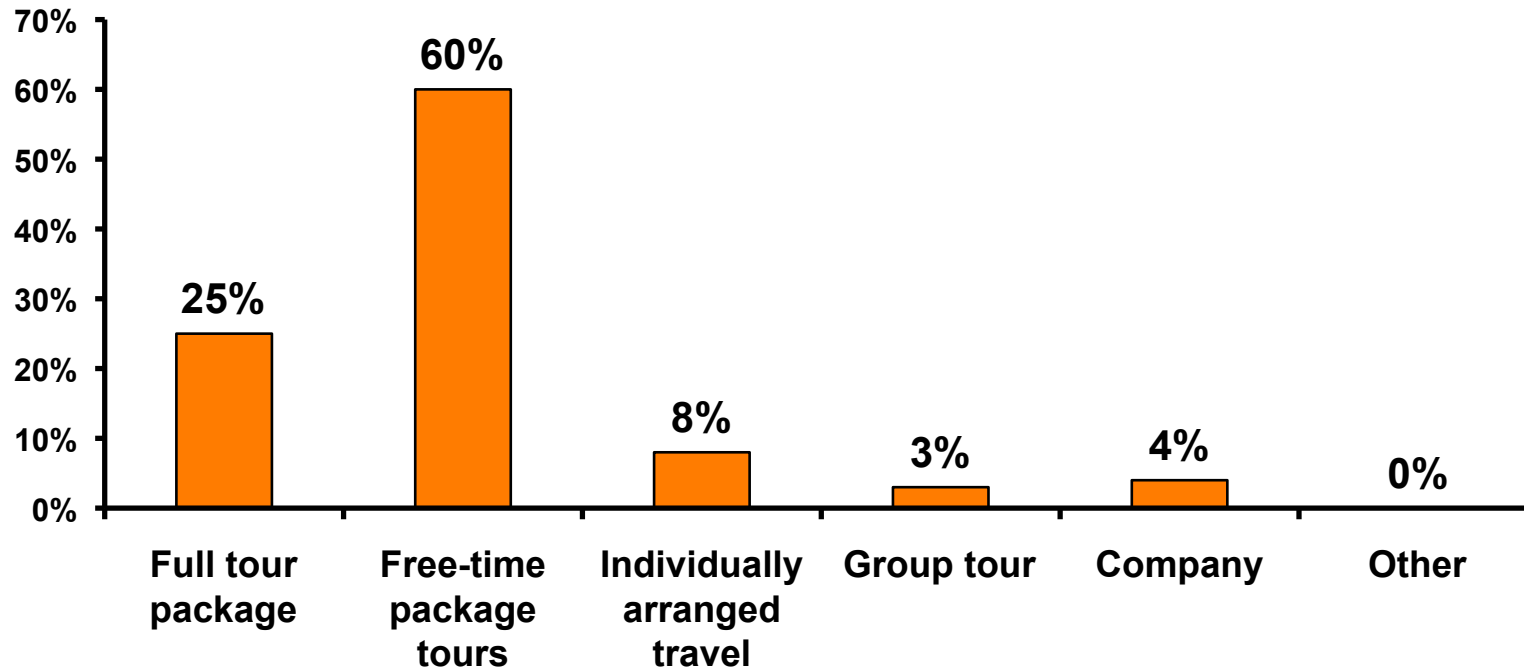


# Occupation by Income

		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	22%	7%	21%	24%	14%	24%	21%	18%	100%		
	Engineer	16%	7%	10%	18%	24%	13%	21%	18%			
	Salesperson	13%	14%	17%	12%	20%	12%	14%	10%			
	Manager	7%					10%	23%	14%			
	Self-employed	7%	7%		10%	12%	9%		8%			
	Other	5%	7%	2%	4%	4%	6%	5%	6%			
	Student	5%	14%	2%	2%	4%	4%		6%			
	Skilled worker	5%		14%	6%	4%	4%	5%				
	Govt- office worker non-mgr	5%		14%	12%	6%			2%			
	Homemaker	4%	7%	2%	4%	8%	4%	2%	6%			
	Freeter	4%	14%	10%				5%	4%			
	Professional/ Specialist	2%					6%		2%			
	Govt- Manager	1%			2%		3%	2%	2%			
	Retired	1%		2%		2%	3%					
	Executive (30+ employees)	1%	7%	2%					4%			
	Free-lancer	1%	7%		4%							
	Teacher	1%		2%			1%	2%				
	Unemployed	1%	7%									
	Total	Count	344	14	42	49	49	68	43		50	1

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



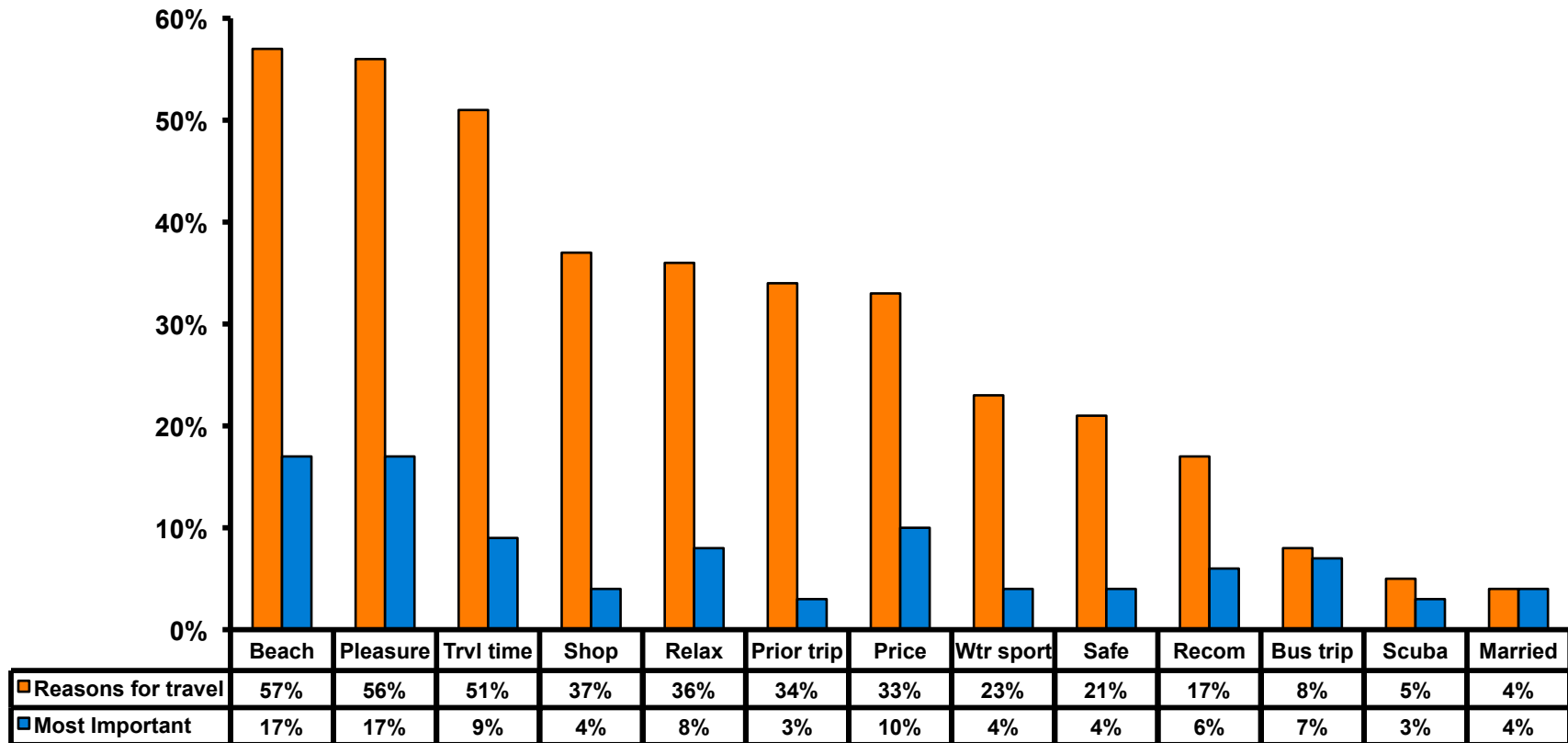
# Accommodation by Income

Average length of stay: 2.95 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	19%	21%	19%	14%	8%	21%	19%	16%	100%	
Guam Reef & Olive Spa	14%	21%	24%	10%	22%	12%	5%	20%		
Hotel Nikko Guam	9%	14%	7%	6%	4%	16%	7%	10%		
Onward Beach Resort	6%		5%	6%	6%	4%	12%	6%		
Pacific Bay Hotel	6%		12%	8%	6%	6%	9%	2%		
Grand Plaza Hotel	6%	14%	10%	2%	4%	1%	14%	4%		
Hilton Guam Resort	5%		2%	4%	6%	9%	2%	6%		
Fiesta Resort Guam	5%			10%	8%	4%	5%	4%		
PIC Club	5%			6%	2%	4%	5%	14%		
Hotel Santa Fe	3%		2%	4%	6%	1%	5%			
Oceanview Hotel	3%	7%	2%	2%		3%		6%		
Outrigger Guam Resort	3%	14%			2%	3%	7%	4%		
Leo Palace Resort	3%			2%	4%	4%	2%			
Bayview Hotel	3%		5%	4%	6%			4%		
Sheraton Laguna Guam	2%			2%	2%	3%	5%			
Hyatt Regency Guam	2%			8%	2%	1%		2%		
Westin Resort Guam	2%				4%	4%	2%			
Holiday Resort Guam	1%		5%	4%				2%		
Guam Marriott Resort	1%			4%	4%		2%			
Royal Orchid Guam	1%	7%	2%			1%				
Tumon Bay Capital Hotel	0%		2%							
Ramada Suites Guam	0%				2%					
Other	0%		2%							
Home stay/ friend/ relative	0%			2%						
Total	Count	351	14	42	49	49	68	43	50	1



# Travel Motivation - Top Responses



# Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure and
- Value

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	57%	60%	62%	48%	58%	52%	63%	
	Pleasure	56%	66%	56%	47%	58%	50%	62%	
	Short travel time	51%	46%	53%	50%	55%	53%	48%	
	Shopping	37%	54%	40%	23%	27%	27%	47%	
	Relax	36%	47%	34%	30%	39%	32%	40%	
	Previous trip	34%	24%	29%	49%	39%	41%	28%	
	Price	33%	38%	30%	30%	39%	34%	31%	
	Water sports	23%	34%	25%	15%	15%	18%	28%	
	Safe	21%	19%	19%	22%	36%	21%	22%	
	Recomm- friend/family/trvl agnt	17%	31%	17%	11%	9%	14%	21%	
	Company/ Business Trip	8%	6%	1%	18%	9%	10%	5%	
	Scuba	5%	10%	5%	4%		5%	6%	
	Married/ Attn wedding	4%		6%	3%	3%	4%	3%	
	Honeymoon	4%	4%	5%	2%		6%	1%	
	Other	2%			4%	6%	2%	2%	
	Visit friends/ Relatives	2%		1%	4%		1%	3%	
	Golf	1%		1%	2%		1%	1%	
	Organized sports	1%	1%			6%	1%	1%	
	Company Sponsored	1%			2%		1%		
	Total	Count	352	68	149	100	33	180	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	57%	50%	62%	57%	61%	57%	53%	56%		
Pleasure	56%	57%	57%	55%	57%	50%	53%	62%		
Short travel time	51%	43%	45%	43%	53%	46%	63%	66%		
Shopping	37%	57%	50%	27%	37%	31%	33%	34%		
Relax	36%	36%	33%	37%	35%	37%	35%	38%		
Previous trip	34%	21%	24%	16%	33%	47%	42%	42%		
Price	33%	36%	33%	29%	35%	38%	35%	22%		
Water sports	23%	14%	29%	20%	27%	21%	16%	28%		
Safe	21%	14%	24%	10%	29%	26%	23%	12%		
Recomm- friend/family/trvl agnt	17%	14%	24%	22%	16%	12%	16%	14%	100%	
Company/ Business Trip	8%		12%	6%	4%	13%	12%	2%		
Scuba	5%	21%	7%	4%	6%		5%	8%		
Married/ Attn wedding	4%	7%	2%	8%	4%	3%	2%	4%		
Honeymoon	4%		10%	8%	6%	1%		2%		
Other	2%					1%	2%	8%		
Visit friends/ Relatives	2%	14%		4%		3%				
Golf	1%		2%		2%	1%	2%			
Organized sports	1%					1%	2%	2%		
Company Sponsored	1%			2%		1%				
Total	Count	352	14	42	49	49	68	43	50	1

# SECTION 3 **EXPENDITURES**

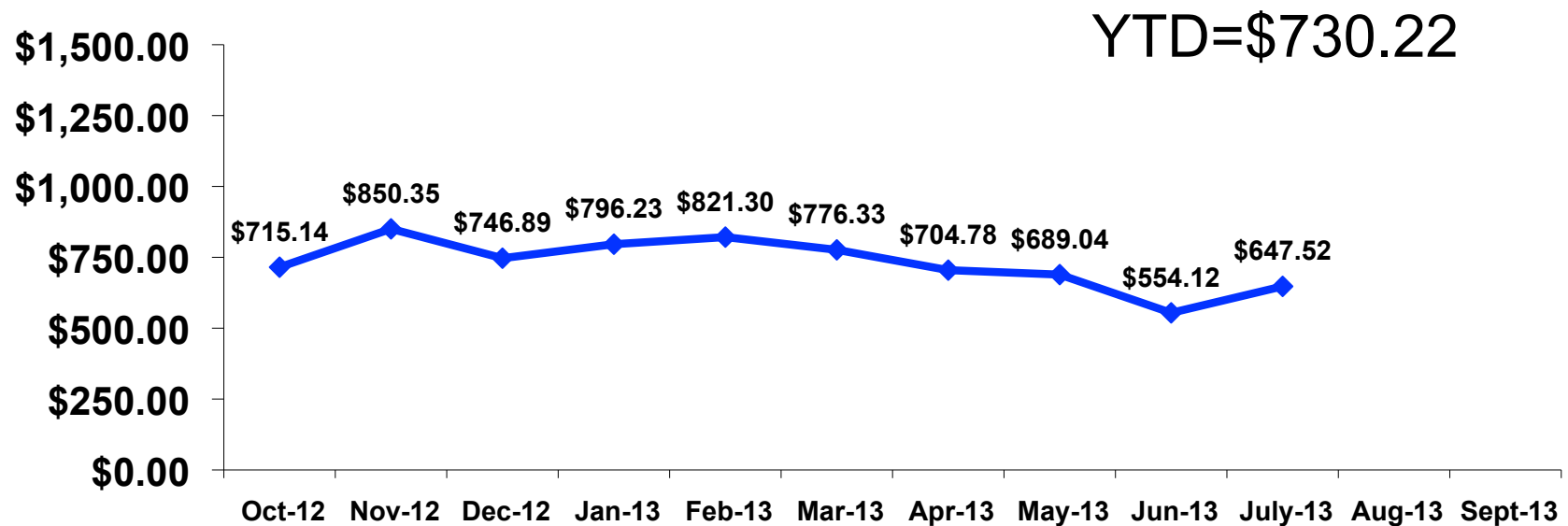
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# Prepaid Expenditures

¥100.03/US\$1

- \$1,270.38 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$7,298 = maximum (highest amount recorded for the entire sample)
- \$647.52 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person



# Breakdown of Prepaid Expenditures

¥100.03=\$1

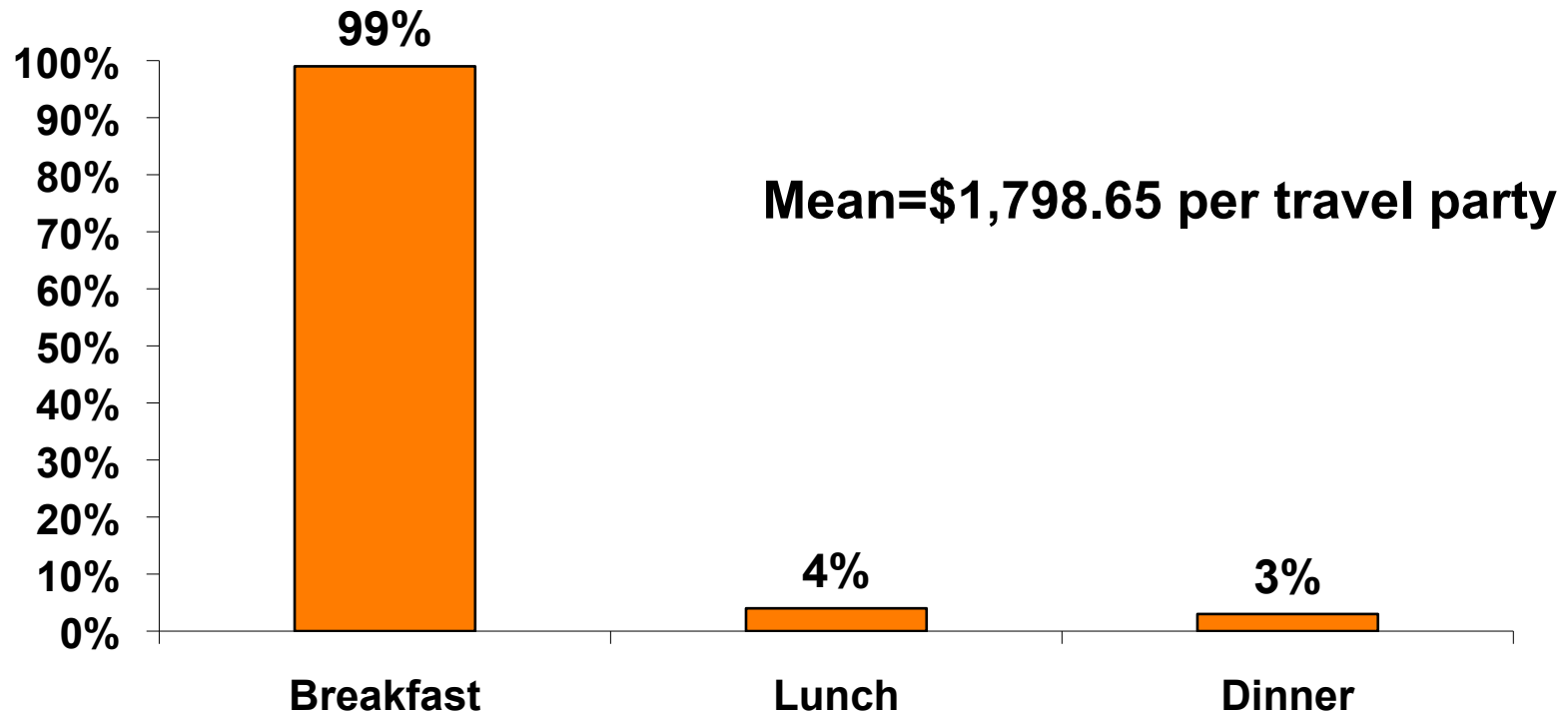
(Filter: Only those who responded/  
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,146.12
Air & Accommodation w/ daily meal package	\$1,798.65
Air only	\$1,441.34
Accommodation only	\$1,054.13
Accommodation w/ daily meal only	\$899.73
Food & Beverages in Hotel	\$-
Ground transportation - Japan	\$63.84
Ground transportation - Guam	\$39.99
Optional tours/ activities	\$241.23
Other expenses	\$418.21
<b>Total Prepaid</b>	<b>\$1,270.38</b>



# Prepaid Meal Breakdown

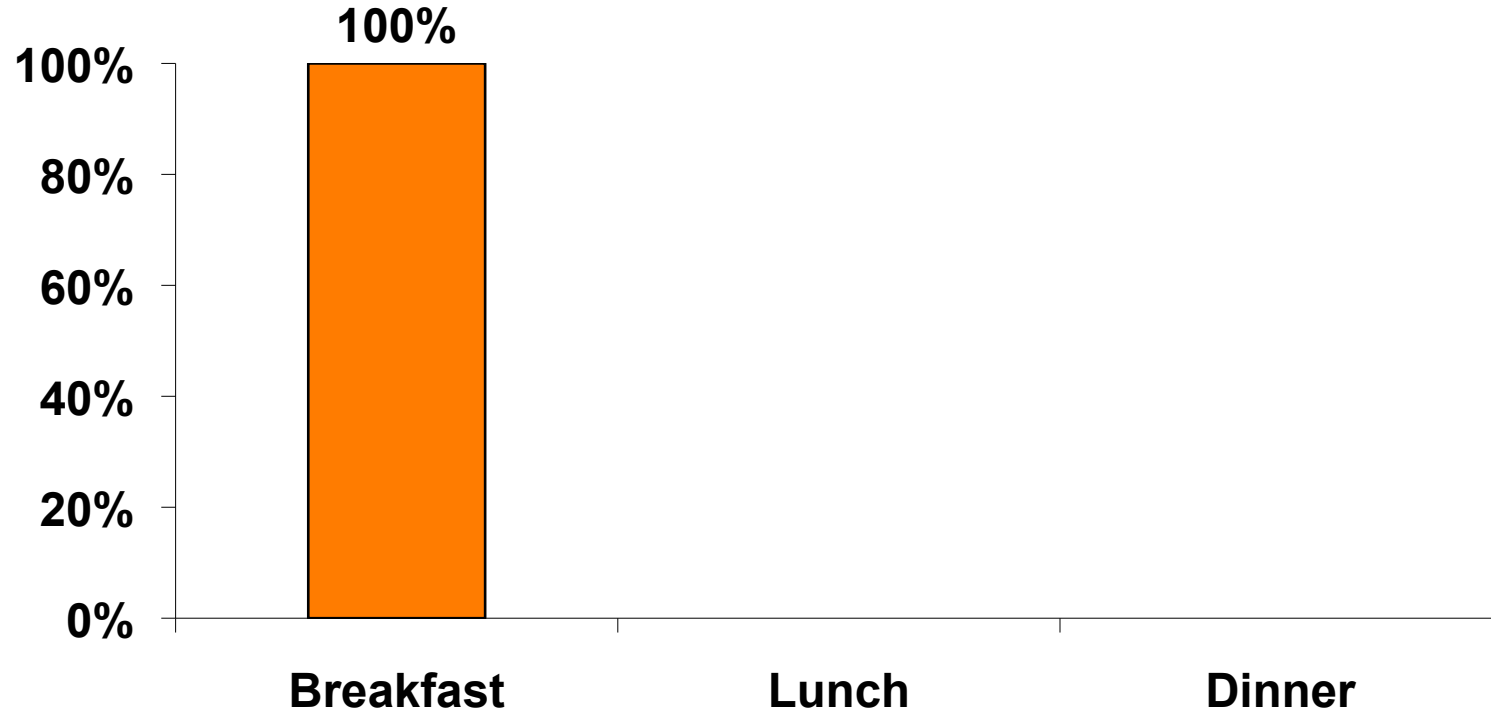
Air/ Accommodations with Daily Meal Package  
n=75



# Prepaid Meal Breakdown

Accommodations with Daily Meal Package

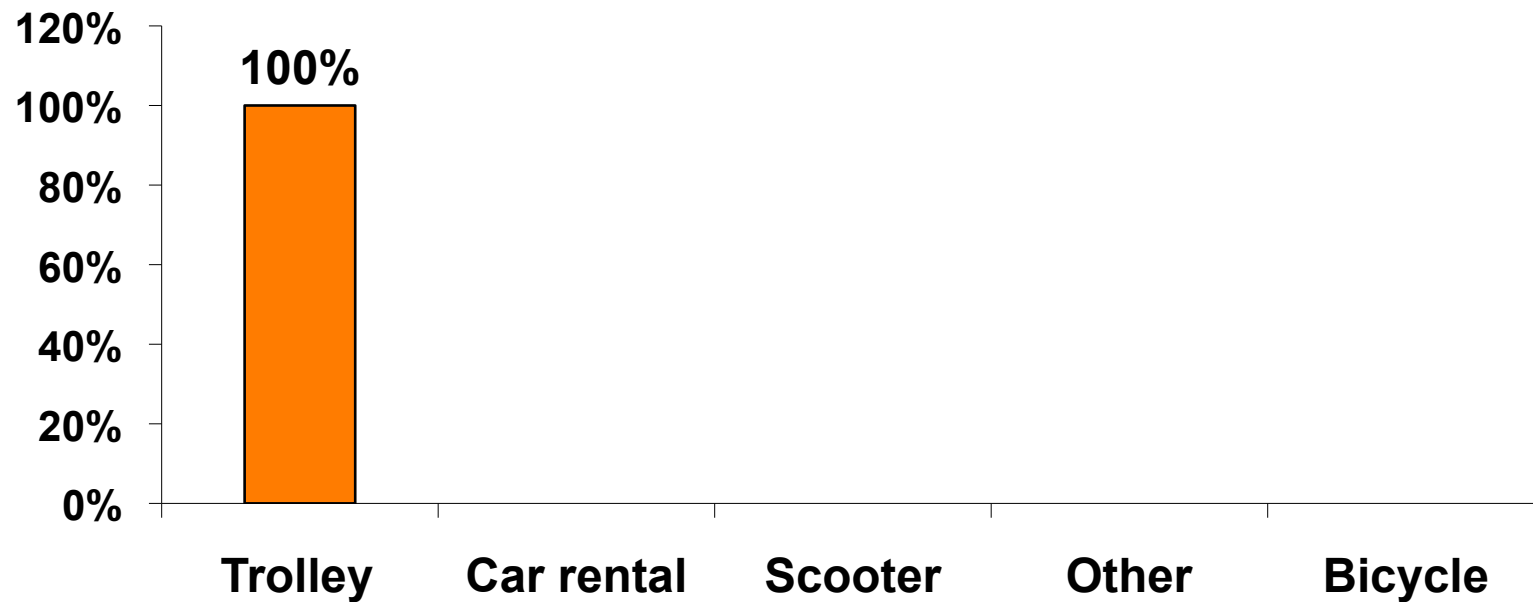
n=1



Mean=\$899.73 per travel party

# Prepaid Ground Transportation

n=3

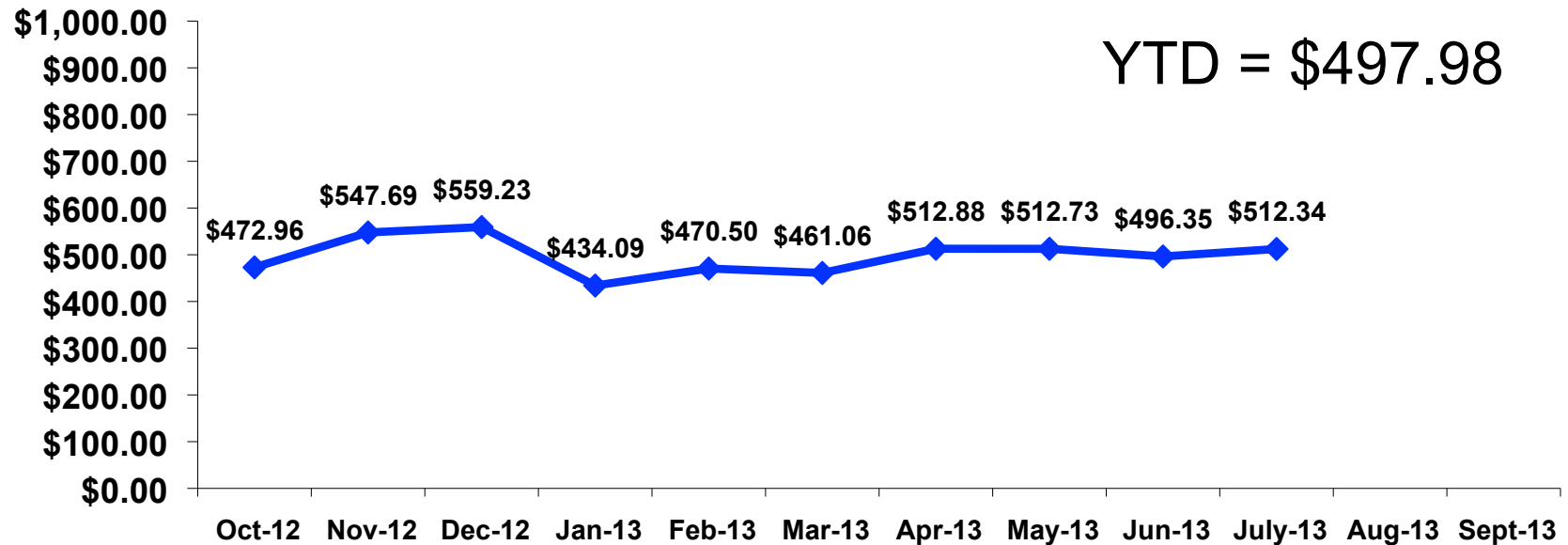


Mean=\$39.99 per travel party

# On-Island Expenditures

- \$813.11 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,000 = Maximum (highest amount recorded for the entire sample)
- \$512.34 = overall mean average per person on-island expenditure

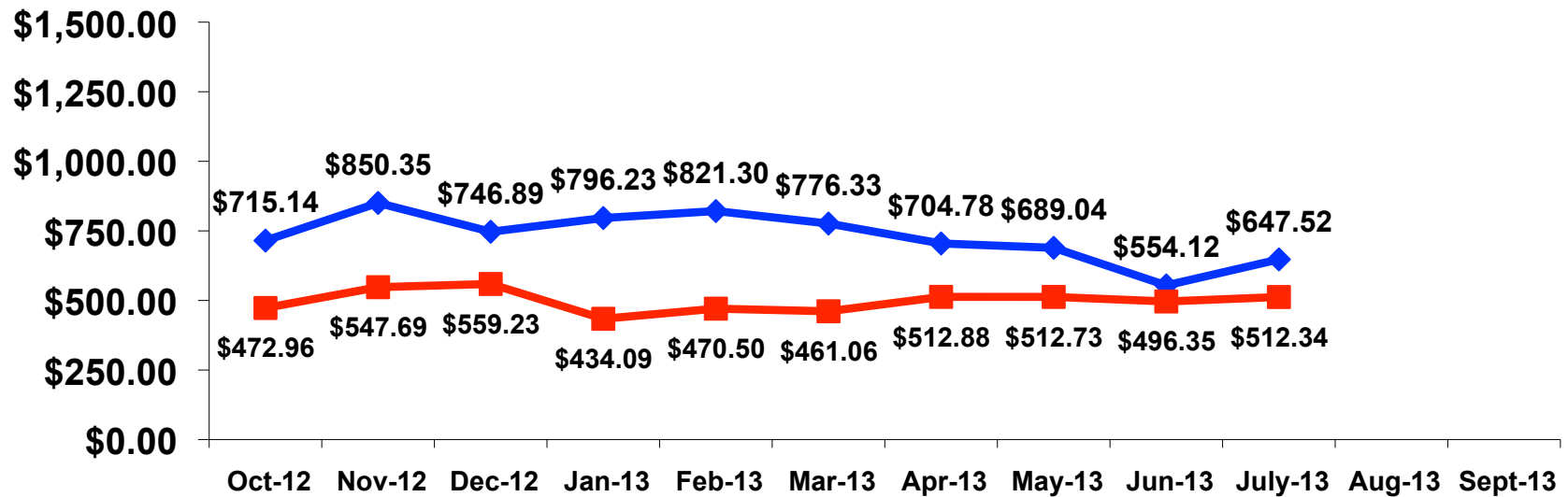
# On-Island Expenditures Per Person



# Prepaid/On-Island Expenditures Per Person

Prepaid YTD = \$730.22

On-Island YTD = \$497.98



# 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	\$512.34	\$489.59	\$536.15	\$652.27	\$522.12	\$429.07	\$392.63	\$619.24	\$549.31	\$396.25	\$505.66
	Median	\$395	\$350	\$400	\$500	\$409	\$333	\$280	\$500	\$390	\$300	\$300
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$131	\$0	\$0	\$0	\$60
	Maximum	\$5,000	\$5,000	\$3,500	\$1,800	\$5,000	\$3,000	\$1,242	\$3,500	\$3,000	\$1,465	\$2,000

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$41.49	\$53.74	\$28.66	\$24.09	\$33.87	\$48.20	\$93.91
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$33.95	\$40.11	\$27.51	\$26.09	\$31.64	\$38.85	\$47.76
	Median	\$10	\$10	\$10	\$2	\$0	\$20	\$20
F&B RESTRNT	Mean	\$89.28	\$118.43	\$58.77	\$78.38	\$73.79	\$110.51	\$119.73
	Median	\$40	\$70	\$24	\$30	\$20	\$60	\$80
OPT TOUR	Mean	\$75.38	\$90.47	\$59.59	\$54.40	\$71.21	\$100.76	\$65.15
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$204.53	\$216.72	\$191.78	\$272.43	\$153.42	\$250.29	\$169.18
	Median	\$50	\$40	\$70	\$100	\$30	\$90	\$50
GIFT- OTHER	Mean	\$139.77	\$151.97	\$127.01	\$117.00	\$139.57	\$141.16	\$185.79
	Median	\$50	\$50	\$50	\$50	\$50	\$100	\$100
TRANS	Mean	\$21.52	\$24.92	\$17.96	\$16.37	\$20.78	\$13.02	\$62.55
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$211.45	\$241.71	\$179.77	\$198.12	\$219.95	\$195.58	\$231.09
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$813.11	\$934.68	\$685.88	\$785.54	\$743.08	\$894.97	\$947.88
	Median	\$600	\$700	\$500	\$505	\$500	\$675	\$600



# On-Island Expenditures

## First Timers & Repeaters

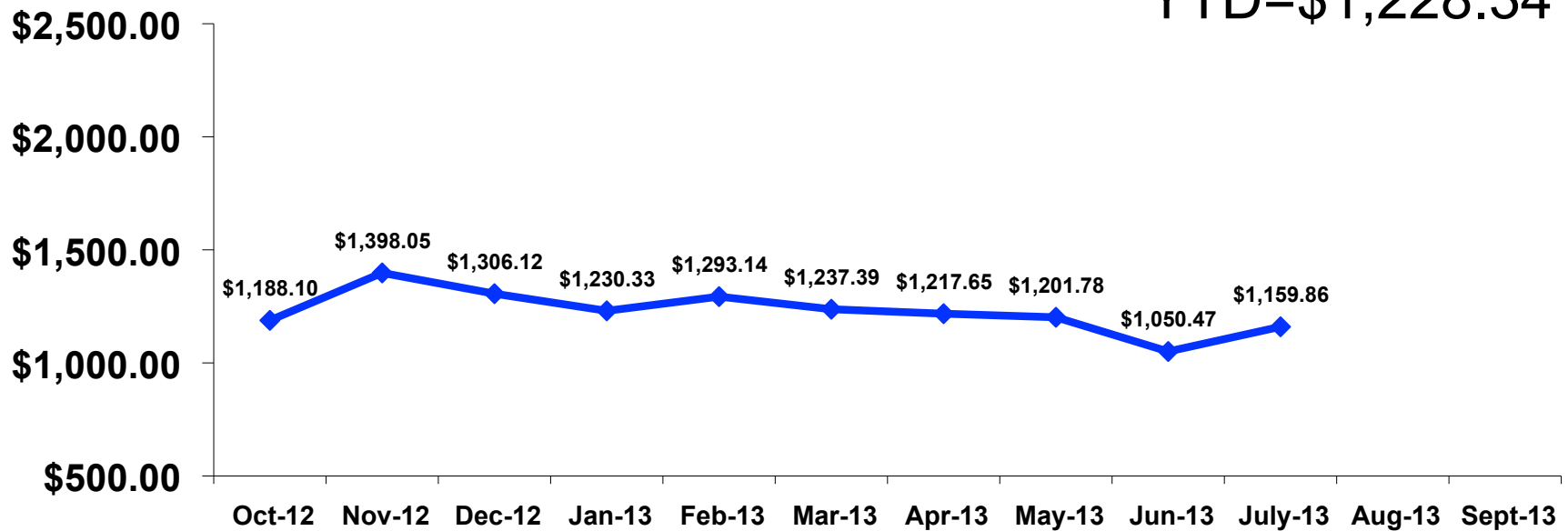
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$41.49	\$35.32	\$49.32
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$33.95	\$32.12	\$36.27
	Median	\$10	\$10	\$10
F&B RESTRNT	Mean	\$89.28	\$87.81	\$91.15
	Median	\$40	\$40	\$50
OPT TOUR	Mean	\$75.38	\$70.30	\$81.84
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$204.53	\$200.61	\$209.52
	Median	\$50	\$40	\$70
GIFT- OTHER	Mean	\$139.77	\$142.65	\$136.11
	Median	\$50	\$50	\$50
TRANS	Mean	\$21.52	\$19.58	\$23.98
	Median	\$0	\$0	\$0
OTHER	Mean	\$211.45	\$169.22	\$265.11
	Median	\$0	\$0	\$0
TOTAL	Mean	\$813.11	\$753.97	\$888.26
	Median	\$600	\$500	\$600

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

- \$1,159.86 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,400 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures Per Person

YTD=\$1,228.34



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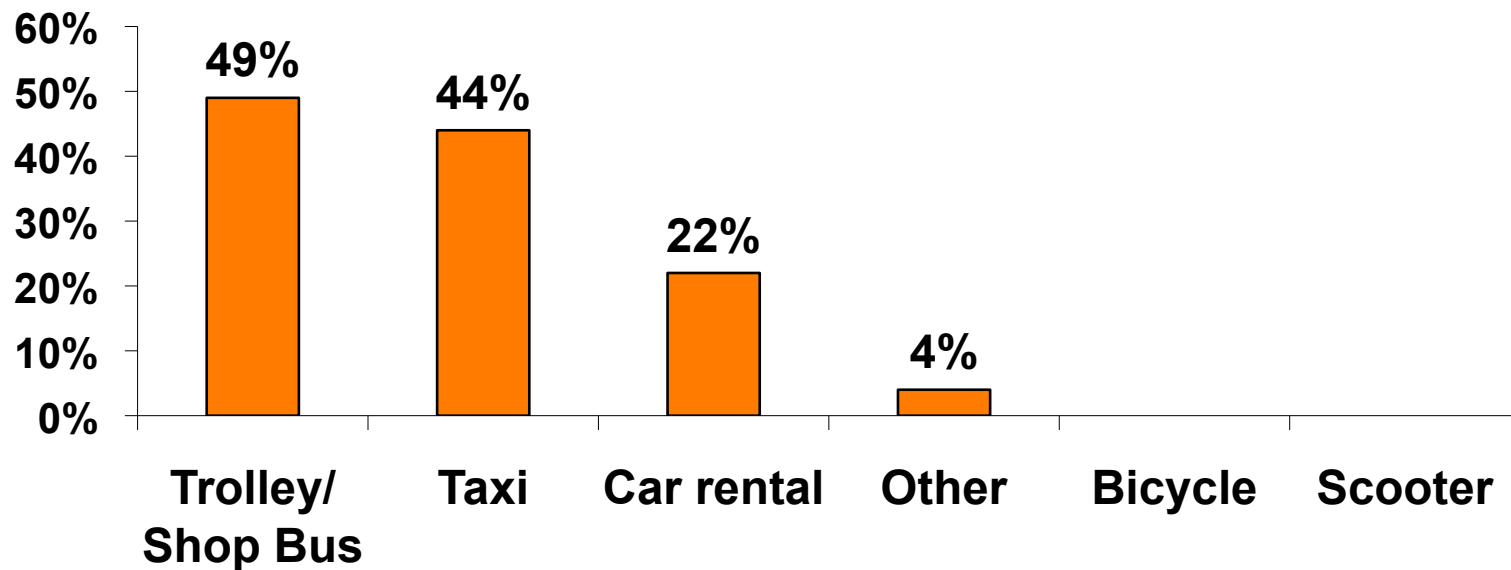
# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$41.49
Food & beverage in fast food restaurant/ convenience store	\$33.95
Food & beverage at restaurants or drinking establishments outside a hotel	\$89.28
Optional tours and activities	\$75.38
Gifts/ souvenirs for yourself/companions	\$204.53
Gifts/ souvenirs for friends/family at home	\$139.77
Local transportation	\$21.52
Other expenses not covered	\$211.45
<b>Average Total</b>	<b>\$813.11</b>

# Local Transportation

n=72

Mean=\$21.52 per travel party



# Guam Airport Expenditures

- \$34.90 = Mean
- \$8 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,000 = Maximum (highest amount recorded for the entire sample)

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# Breakdown of Airport Expenditures

	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	<b>\$7.29</b>
<b>Gifts/Souvenirs Self</b>	<b>\$16.17</b>
<b>Gifts/Souvenirs Others</b>	<b>\$11.43</b>
<b>Total</b>	<b>\$34.90</b>

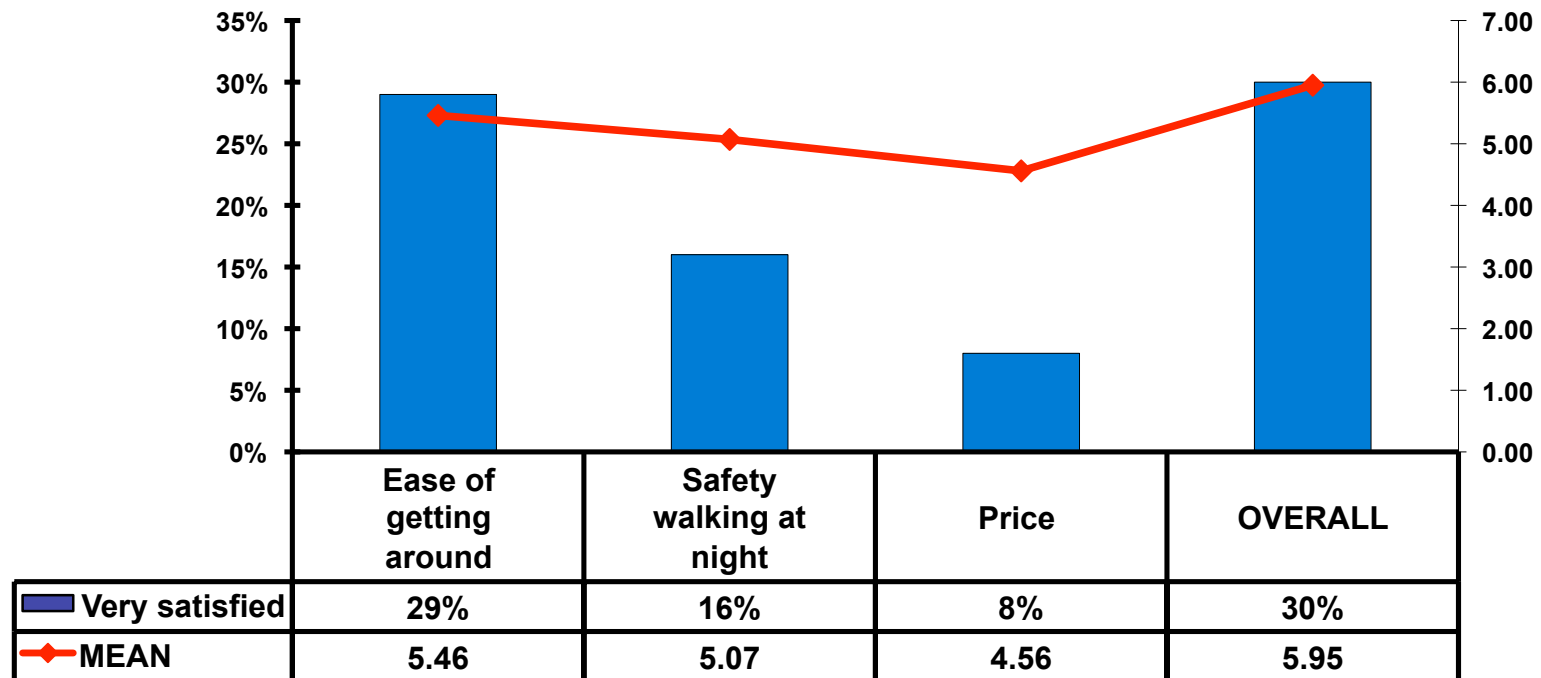
# SECTION 4 **VISITOR SATISFACTION**



# Satisfaction Scores Overall

7pt Rating Scale

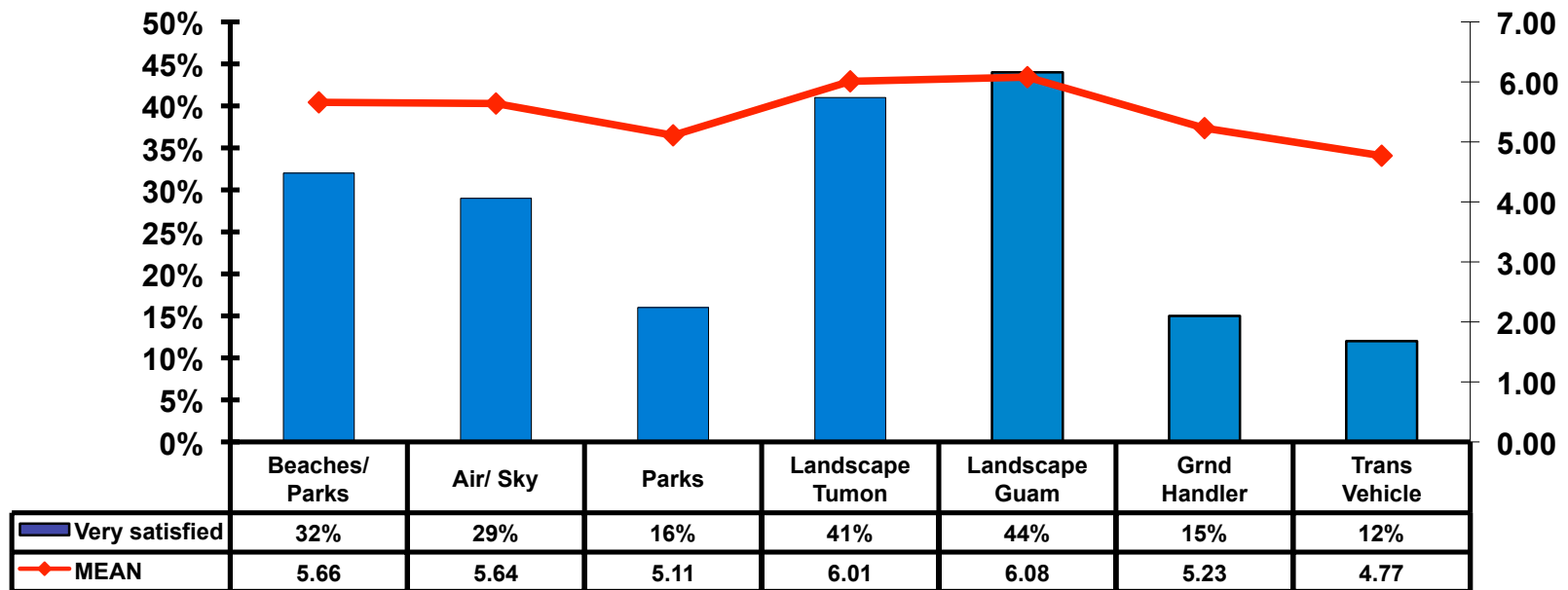
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

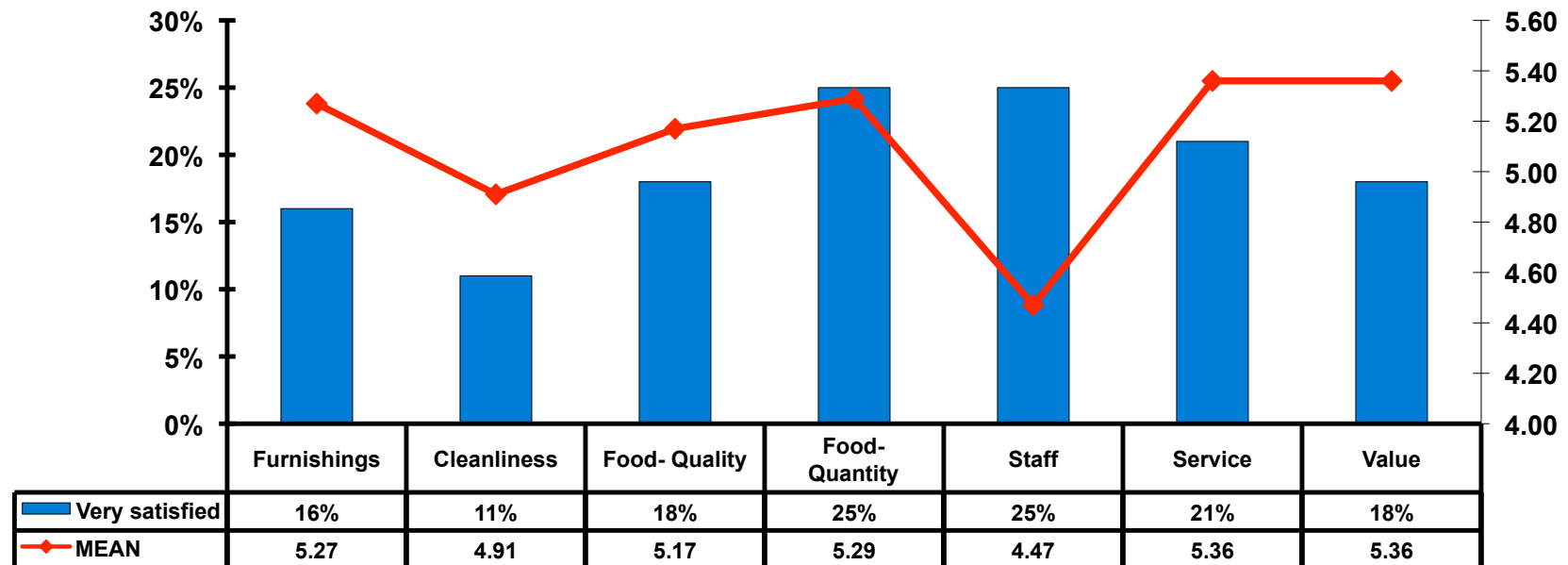
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

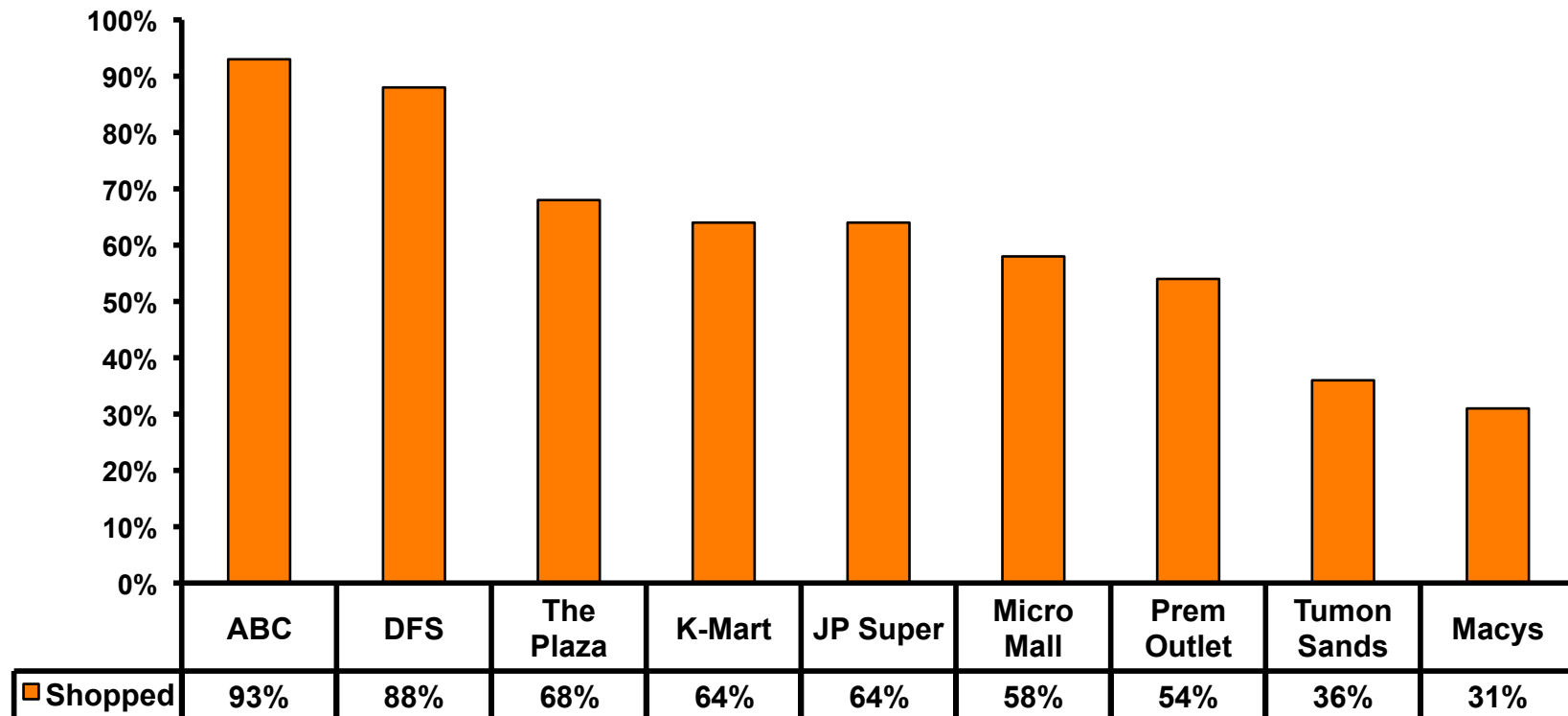
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

7pt Rating Scale

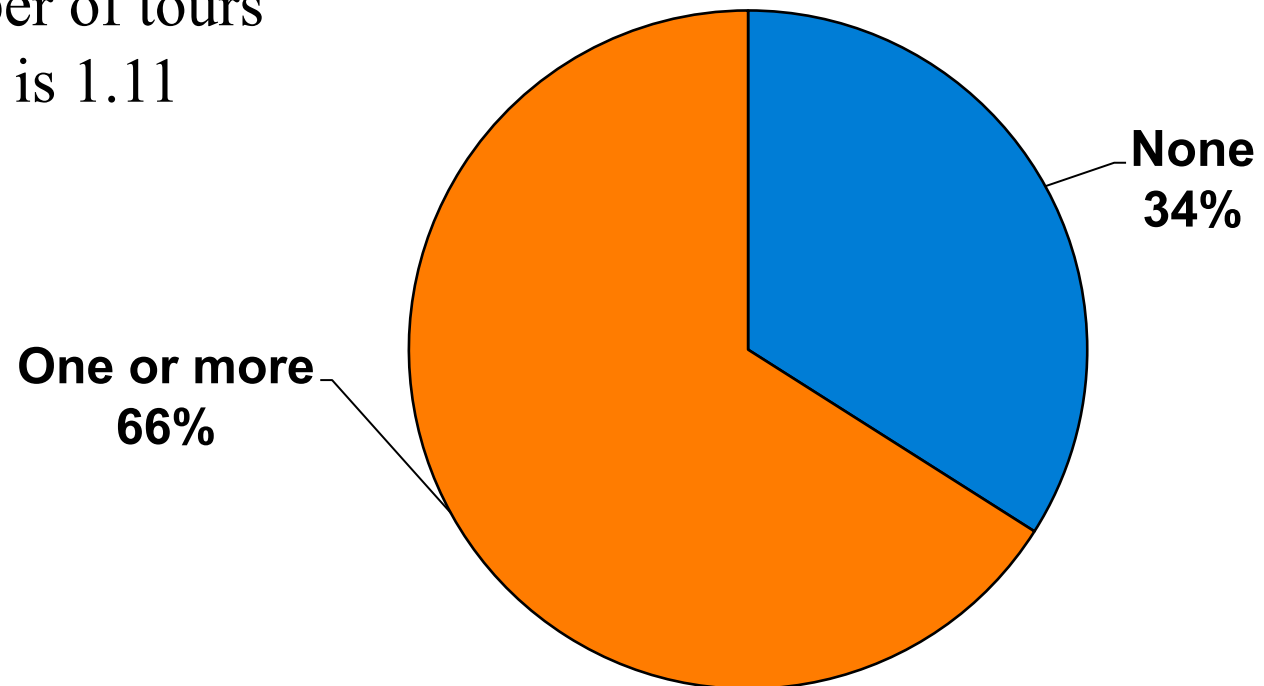
7=Very Satisfied/ 1=Very Dissatisfied

<b>Quality of Shopping</b>	<b>Variety of Shopping</b>
Score of 6 to 7 = <b>54%</b>	Score of 6 to 7 = <b>51%</b>
Score of 4 to 5 = <b>39%</b>	Score of 4 to 5 = <b>41%</b>
Score 1 to 3 = <b>7%</b>	Score 1 to 3 = <b>8%</b>
<b>MEAN = 5.42</b>	<b>MEAN = 5.30</b>

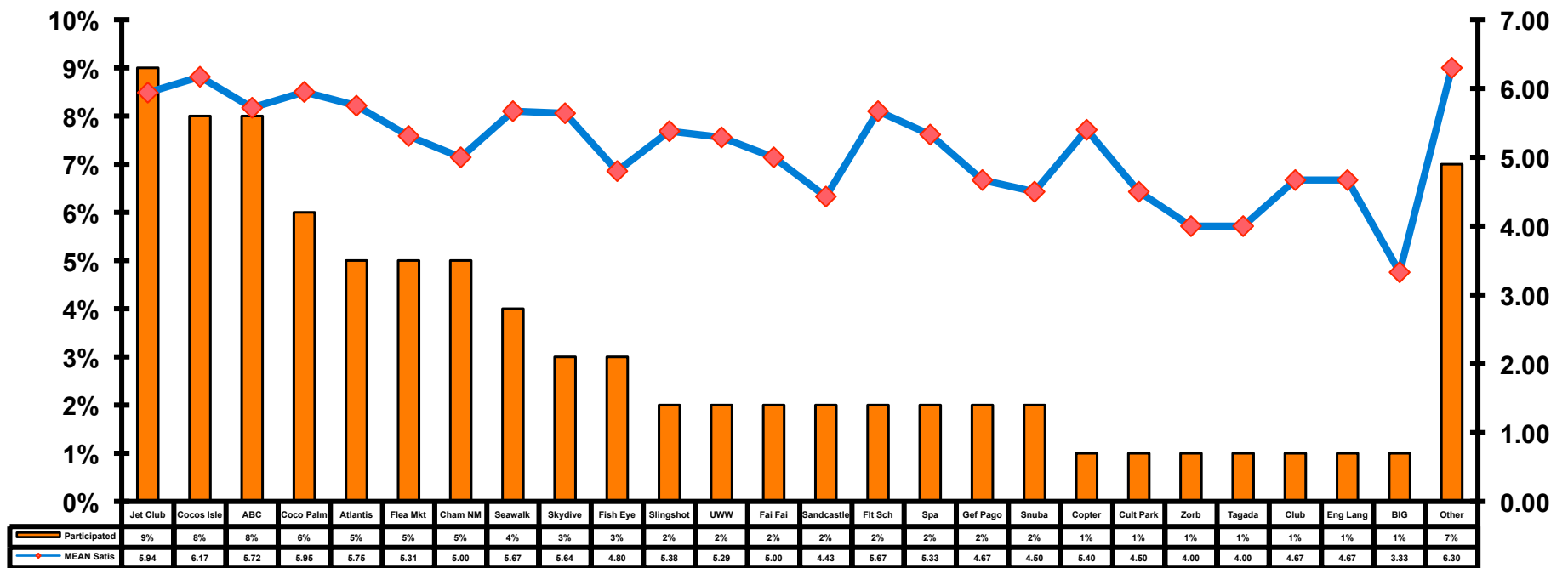
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# Optional Tour Participation

- Average number of tours participated in is 1.11



# 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>59%</b>	Score of 6 to 7 = <b>58%</b>
Score of 4 to 5 = <b>39%</b>	Score of 4 to 5 = <b>41%</b>
Score 1 to 3 = <b>2%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 5.57</b>	<b>MEAN = 5.54</b>

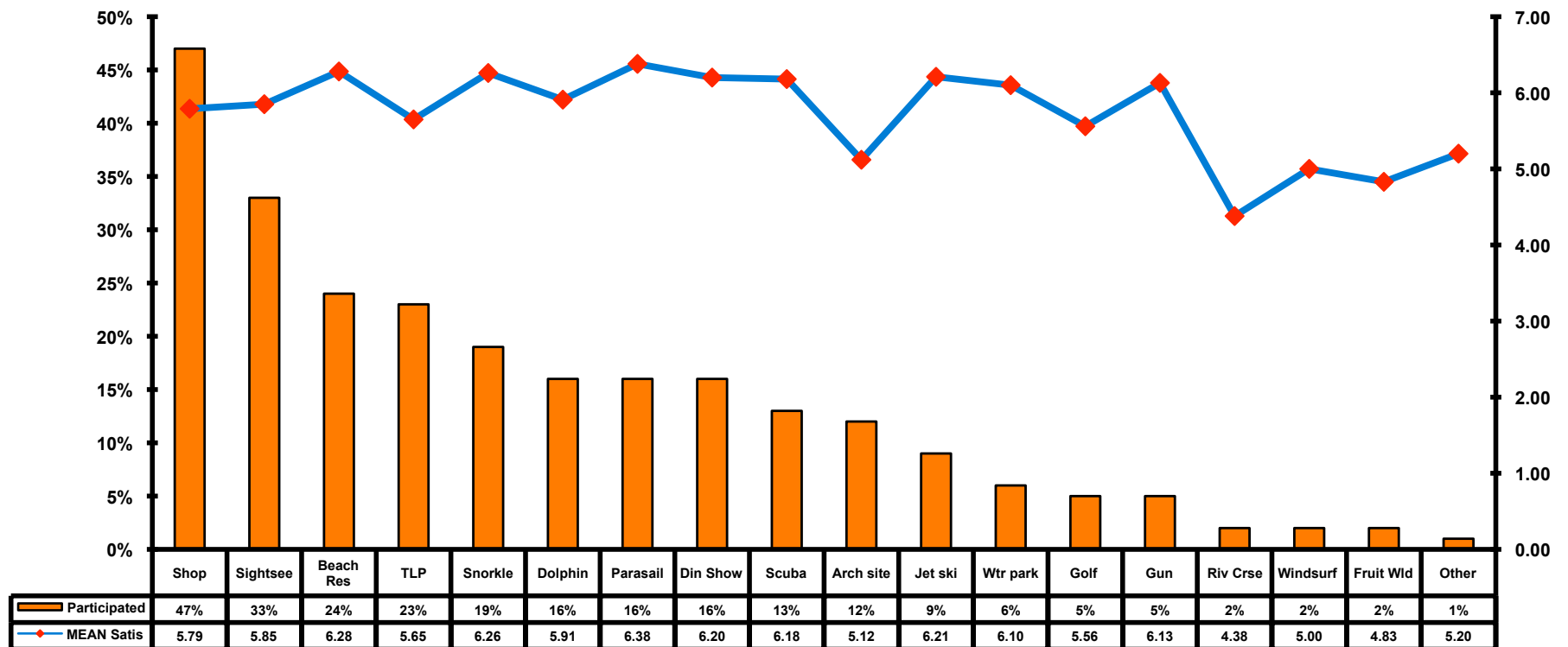
# Night Tours Satisfaction

7pt Rating Scale

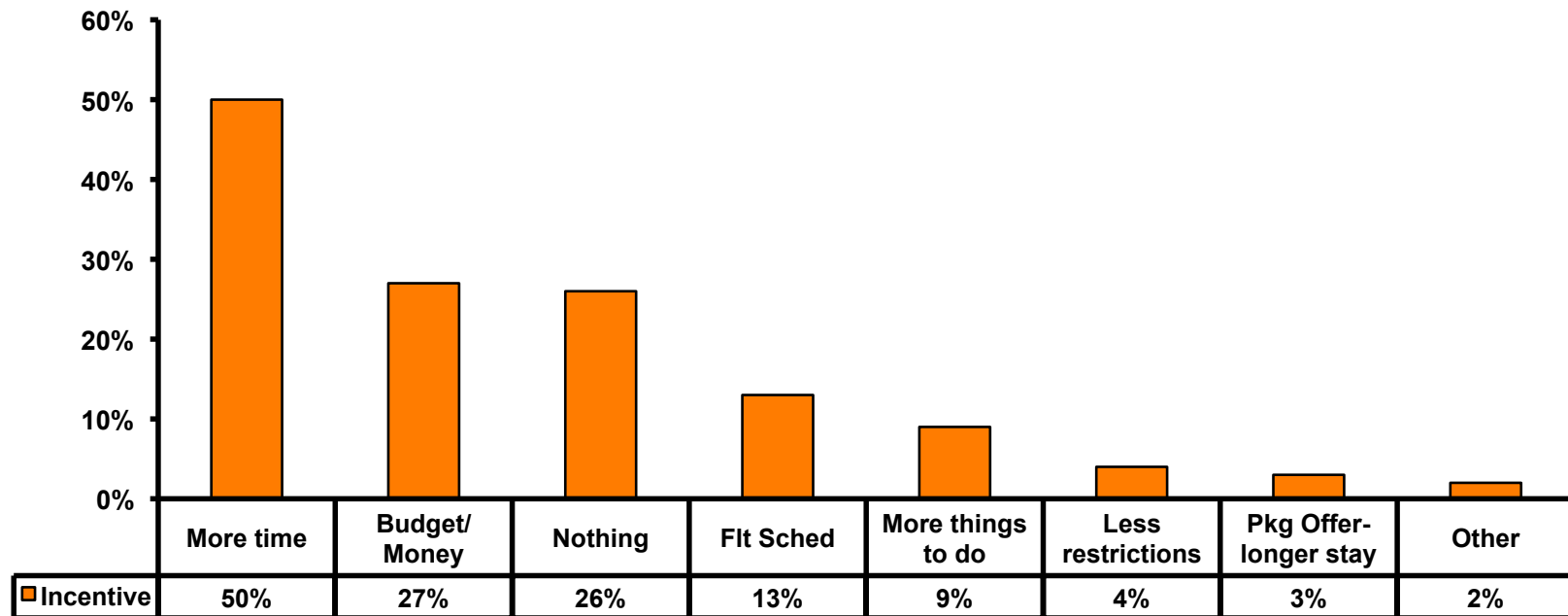
7=Very Satisfied/ 1=Very Dissatisfied

<b>Quality of Night Tour</b>	<b>Variety of Night Tour</b>
Score of 6 to 7 = <b>28%</b>	Score of 6 to 7 = <b>29%</b>
Score of 4 to 5 = <b>69%</b>	Score of 4 to 5 = <b>68%</b>
Score 1 to 3 = <b>2%</b>	Score 1 to 3 = <b>4%</b>
<b>MEAN = 4.77</b>	<b>MEAN = 4.73</b>

# Satisfaction with Other Activities



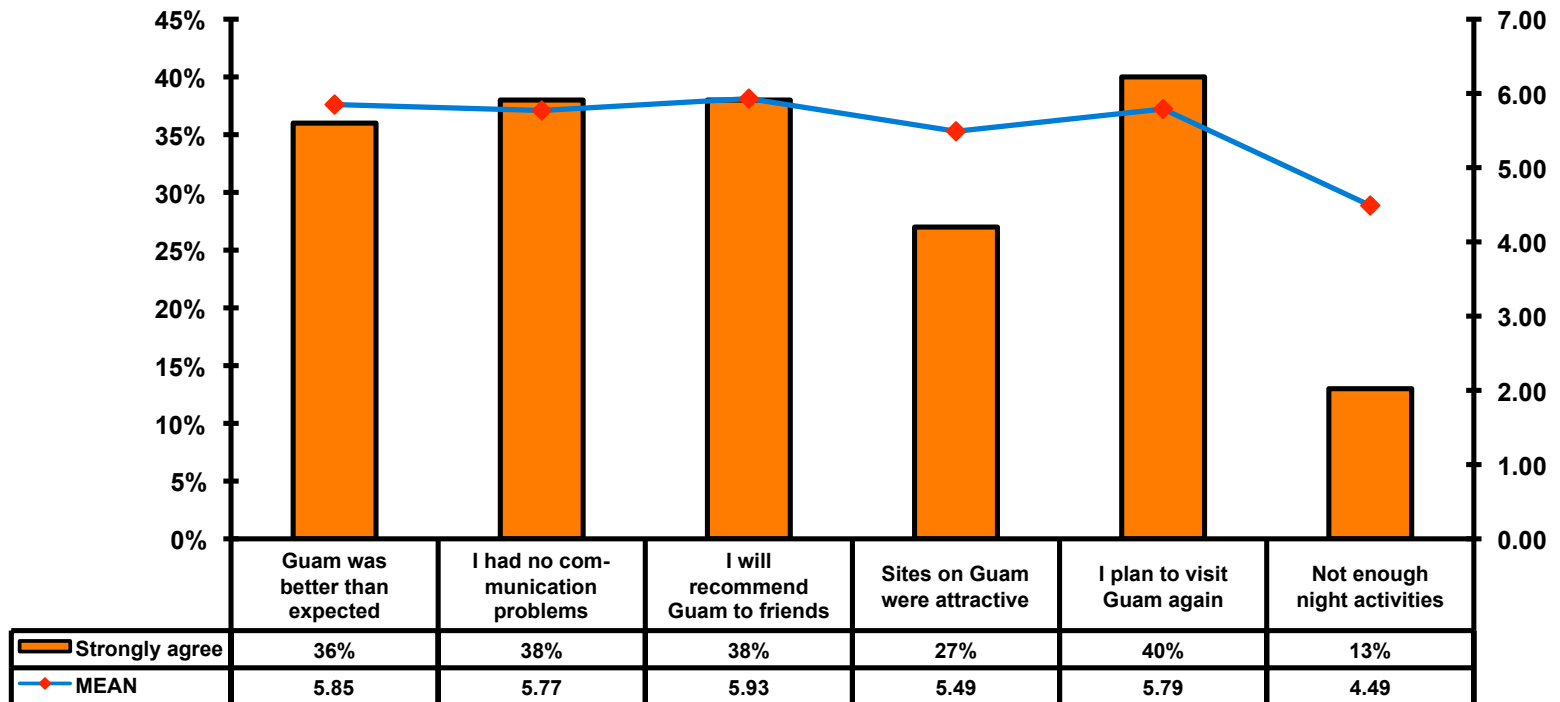
# What would it take to make you want to stay an extra day in Guam?



# On-Island Perceptions

7pt Rating Scale

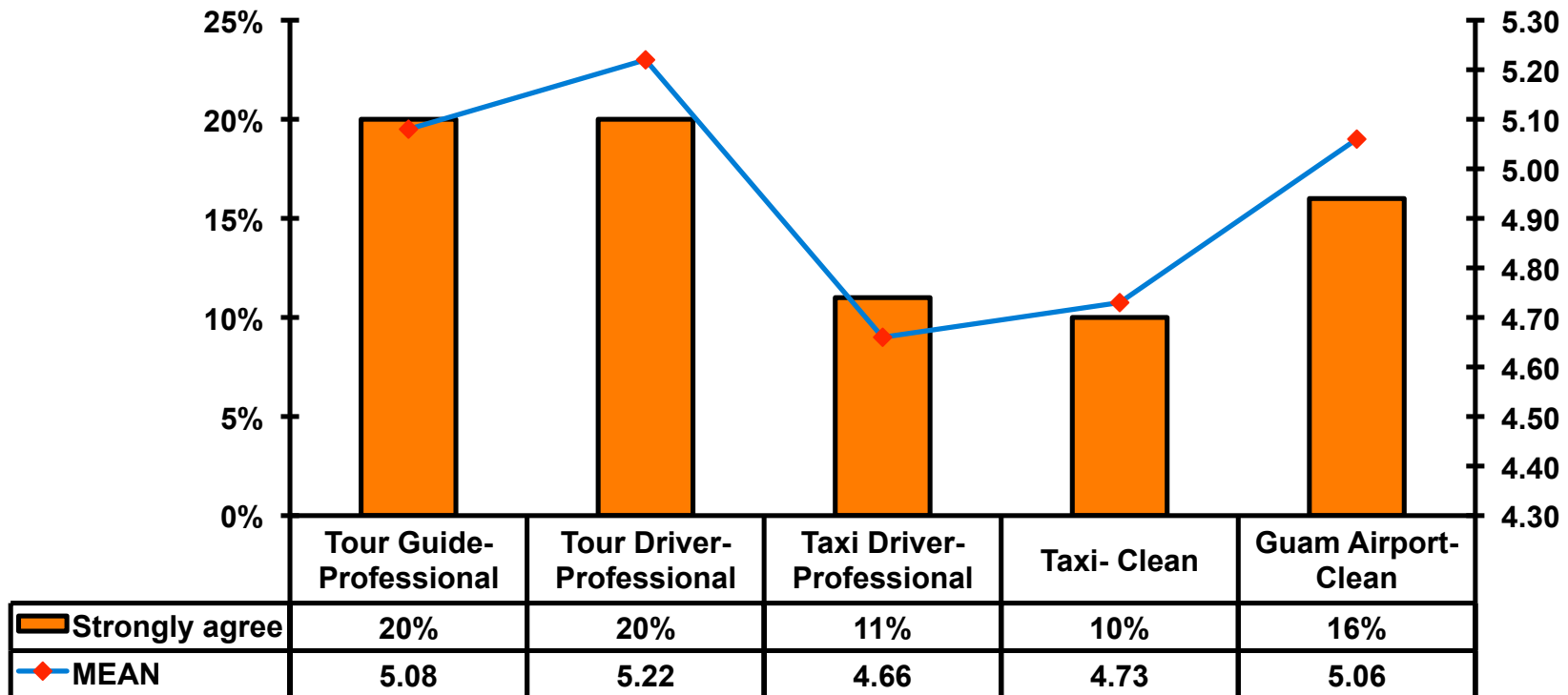
7=Very Satisfied/ 1=Very Dissatisfied



# On-Island Perceptions

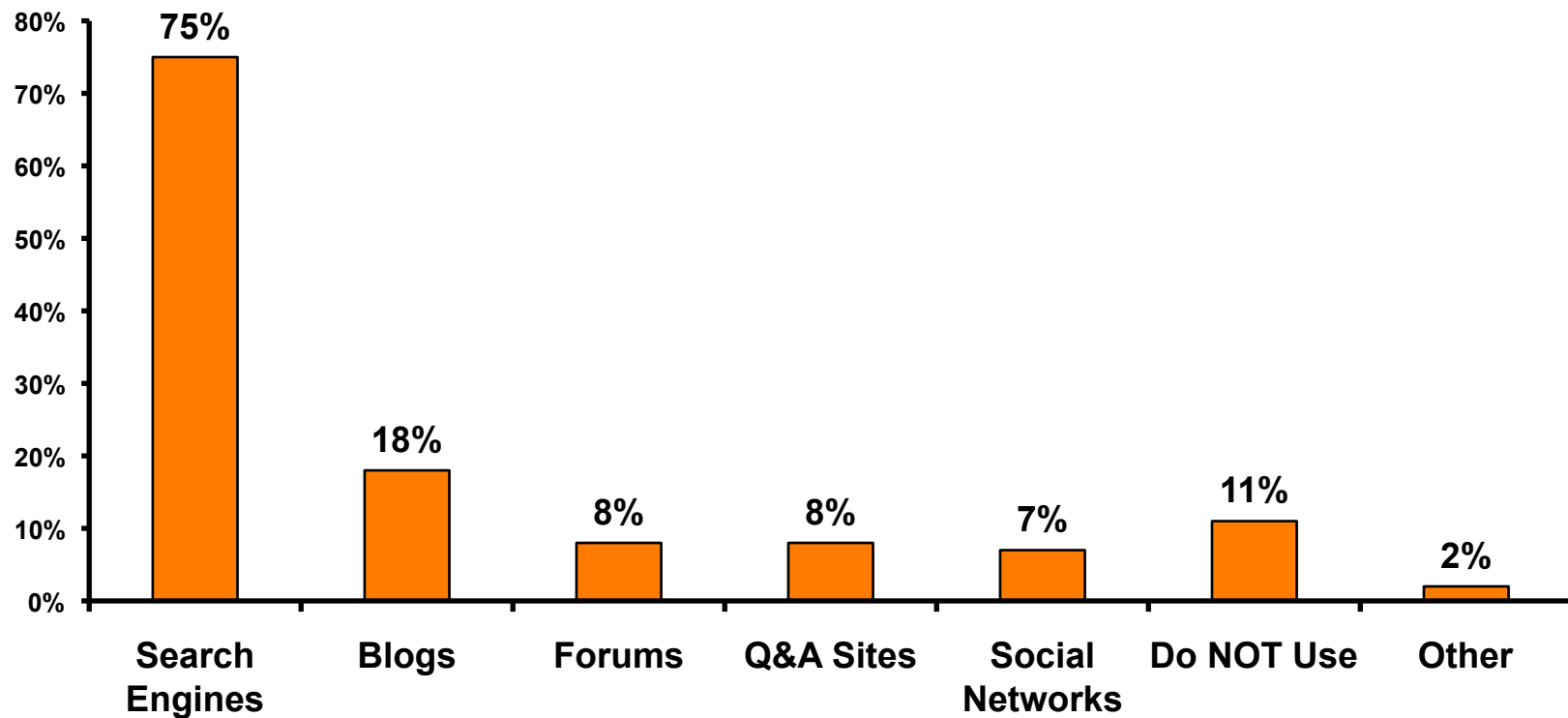
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



# SECTION 5 **PROMOTIONS**

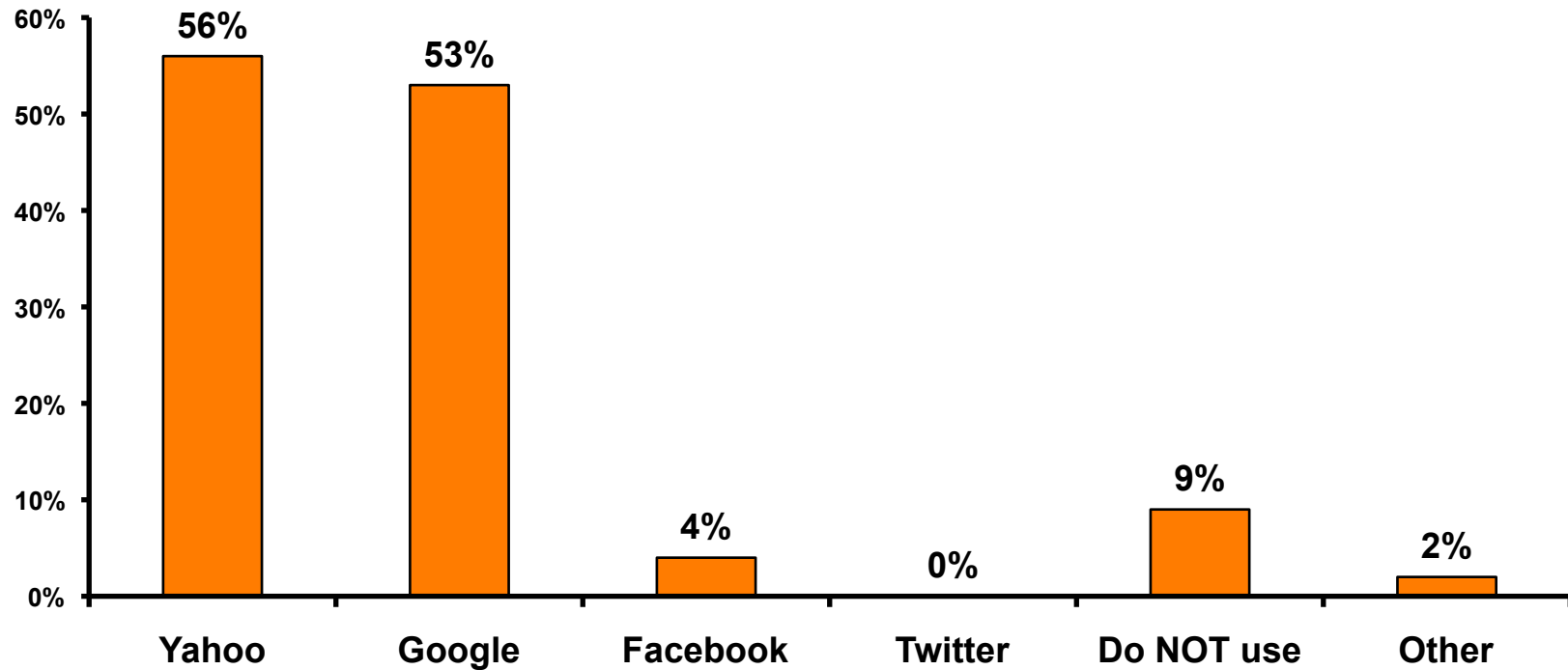
# Internet- Guam Sources of Info



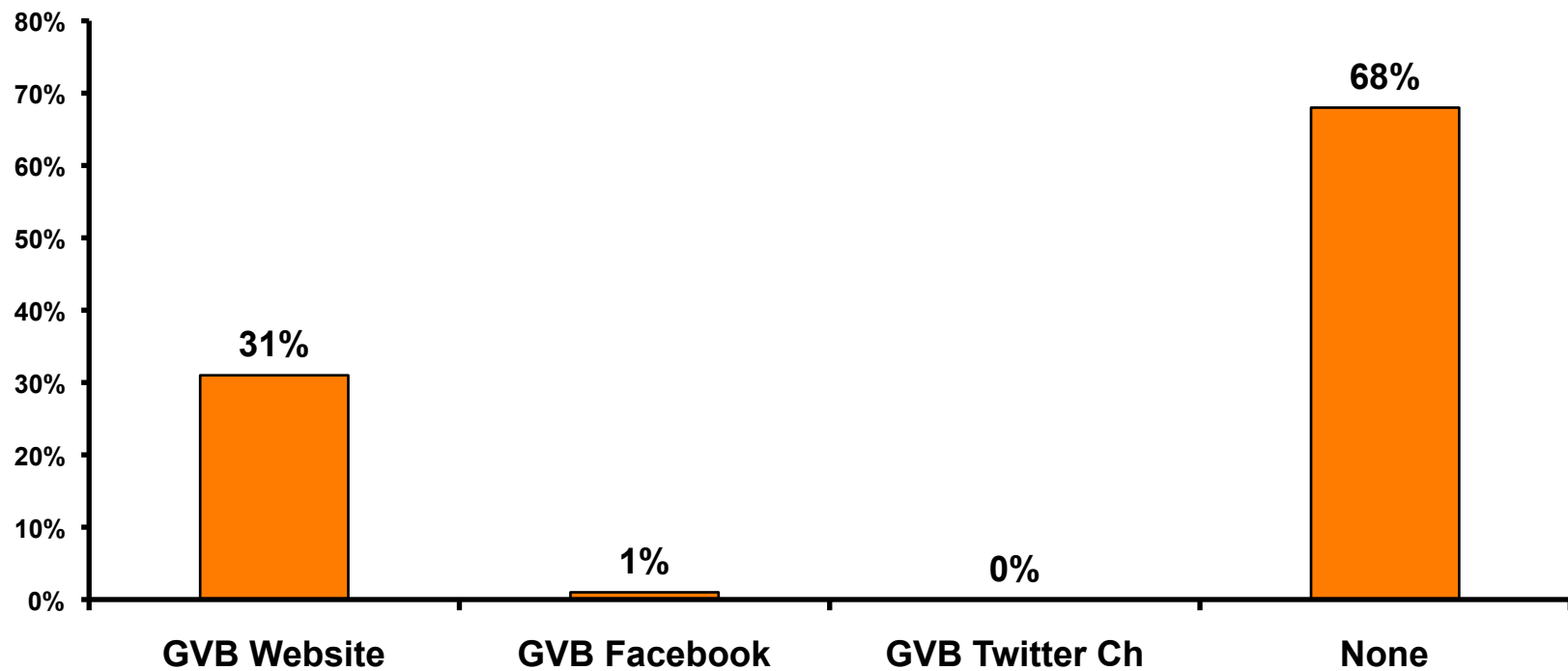


# Internet- Things To Do

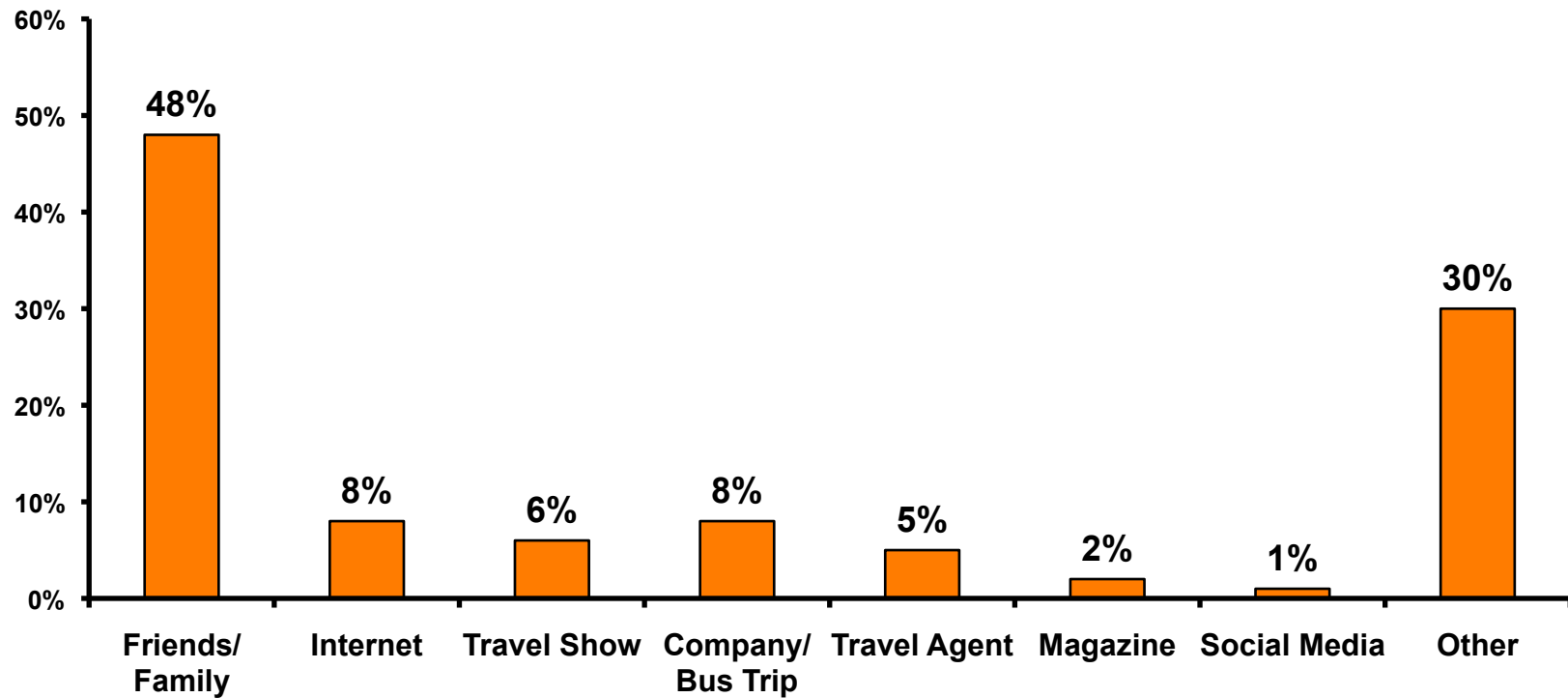
## Sources of Info



# Internet- GVB Sources

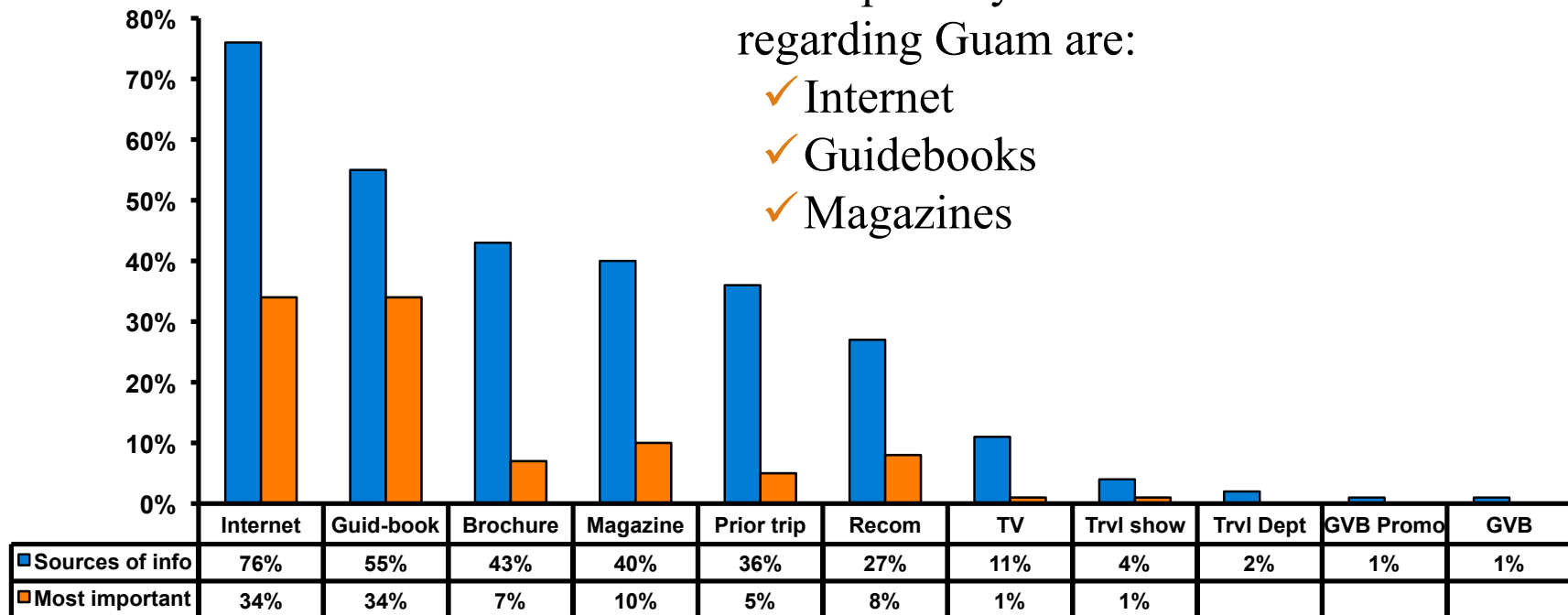


# Travel Motivation- Info Sources



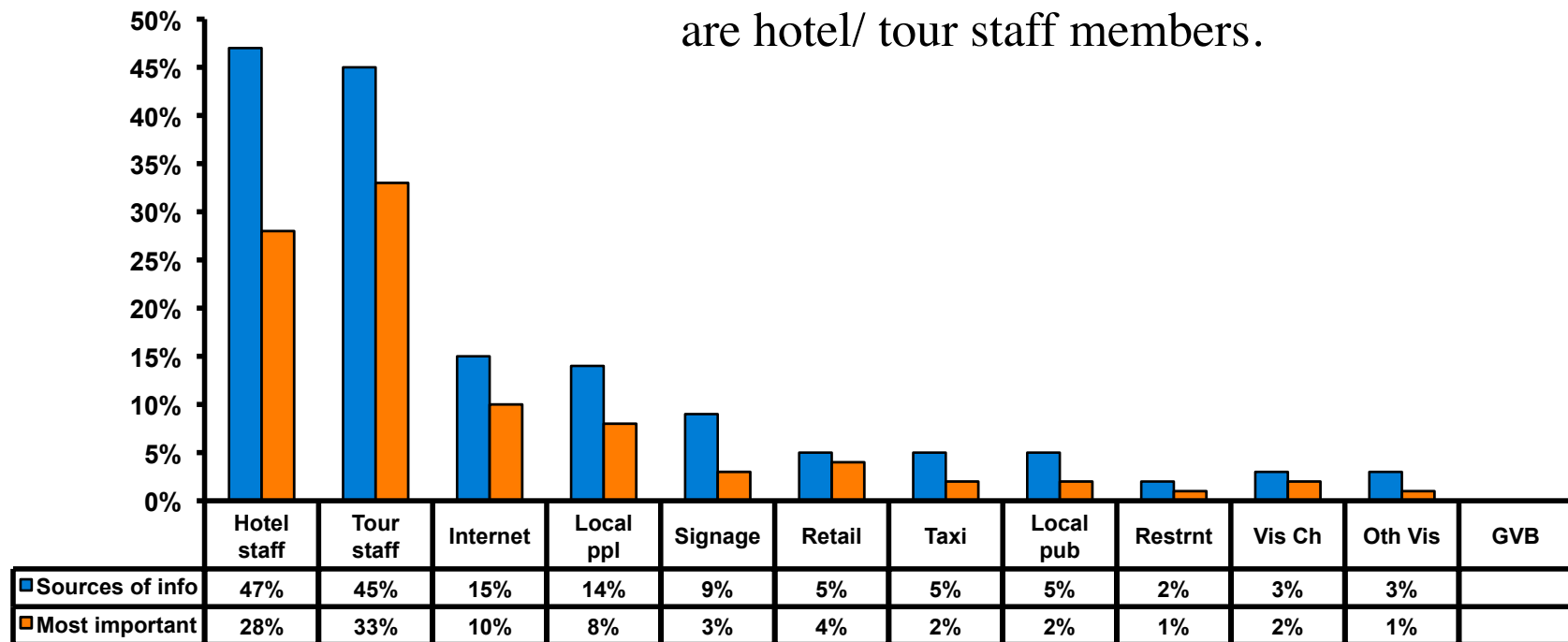
# Sources of Information Pre-arrival

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



# Sources of Information Post-arrival

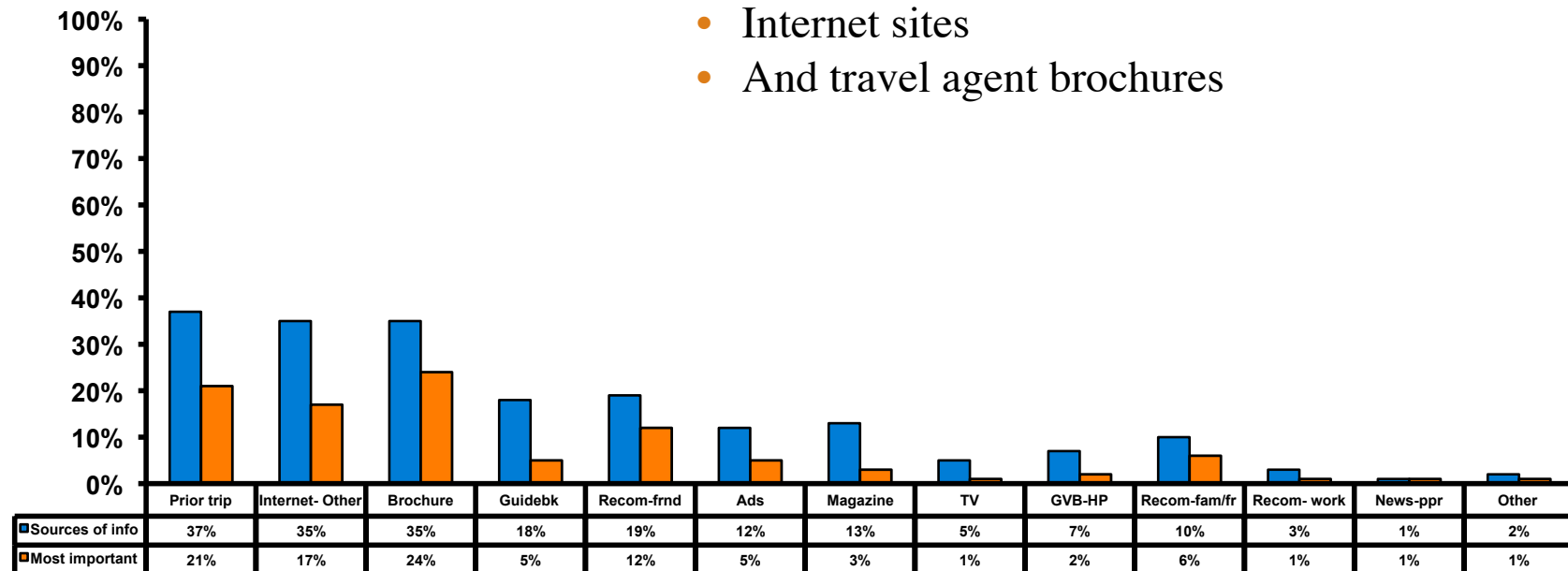
- The primary local source of information are hotel/ tour staff members.



# Sources of Information - Motivation

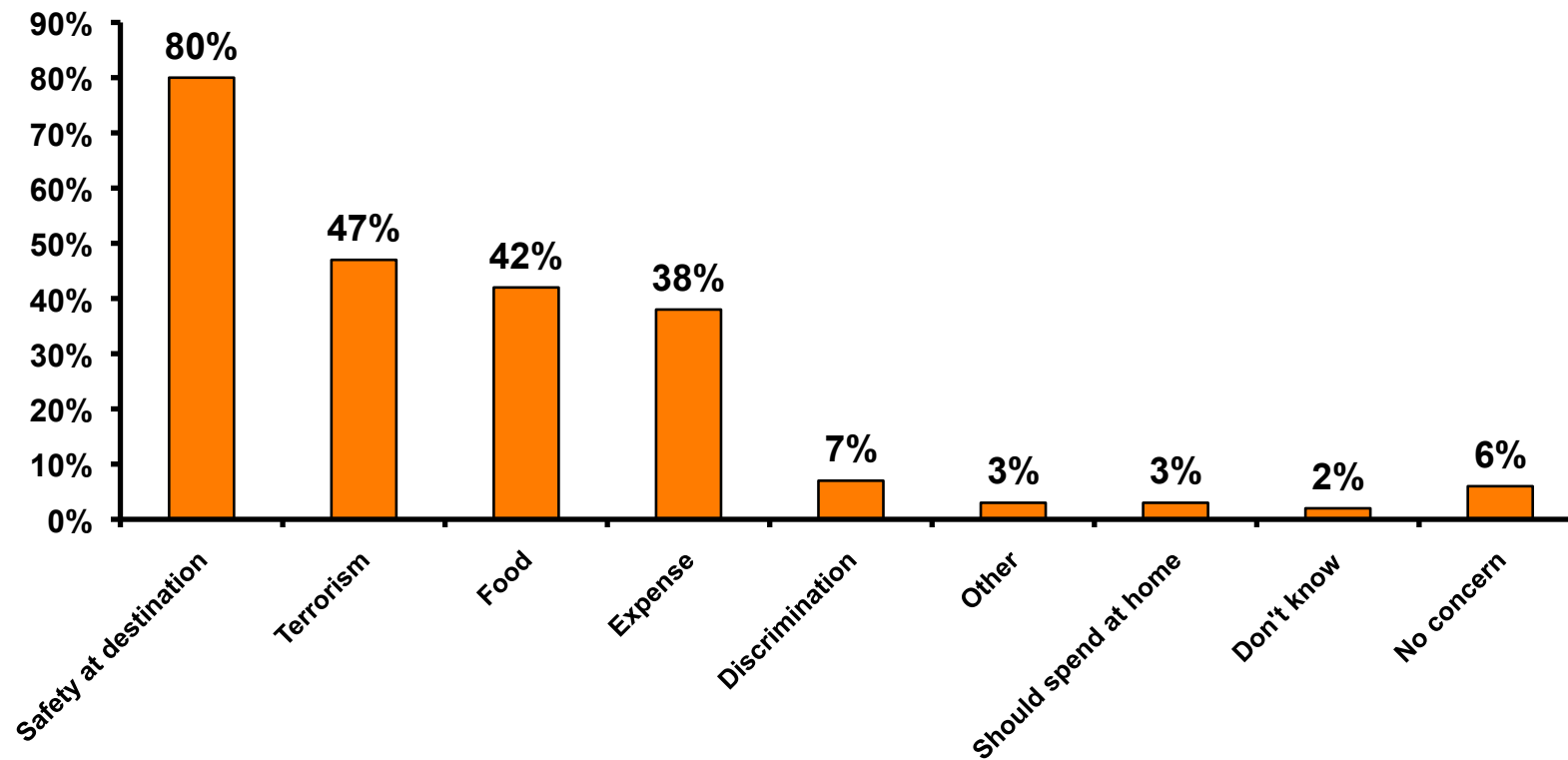
The primary motivational sources of information were.

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



# SECTION 6 **OTHER ISSUES**

# Concerns about travel outside of Japan - Overall

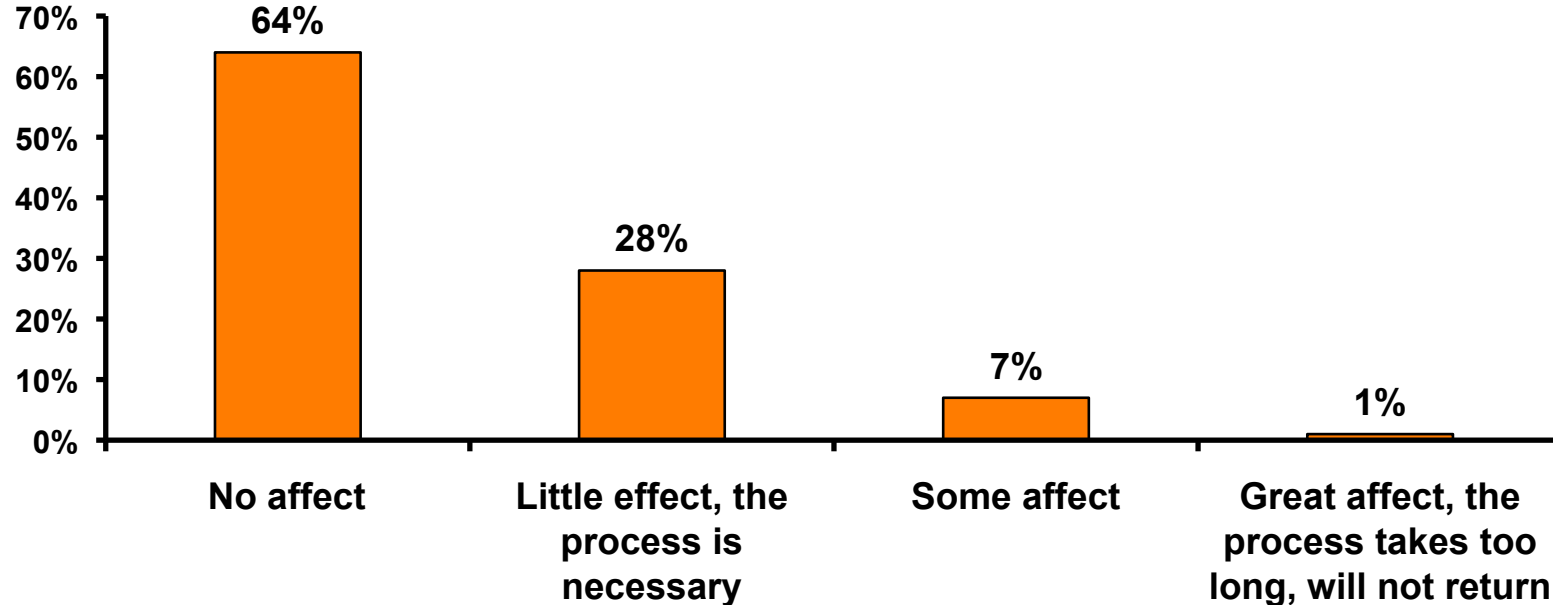




# Concerns about travel outside of Japan - By Age & Income

	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	80%	62%	83%	82%	94%	71%	86%	80%	78%	87%	84%	70%		
Terrorism	47%	41%	48%	47%	48%	36%	55%	49%	49%	53%	51%	28%		
Food	42%	38%	44%	41%	45%	29%	50%	37%	41%	35%	47%	52%		
Expense	38%	29%	40%	37%	48%	36%	33%	31%	51%	44%	40%	34%		
Discrimination against Japanese	7%	7%	5%	8%	9%		10%	8%	4%	13%	2%			
No concerns	6%	15%	4%	3%	3%	14%	2%	4%	6%	6%	2%	10%	100%	
Other	3%	6%	1%	5%			5%	4%		1%	5%	6%		
Should spend at home	3%	3%	3%	3%			5%	8%			2%	2%		
Don't know	2%	4%	1%	2%			2%	2%	4%					
Total	Count	352	68	149	100	33	14	42	49	49	68	43	50	1

# Security Screening/ Immigration Process at Guam International Airport



# Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

