



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013

MARCH 2013



Prepared by: QMark Research

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Background & Methodology

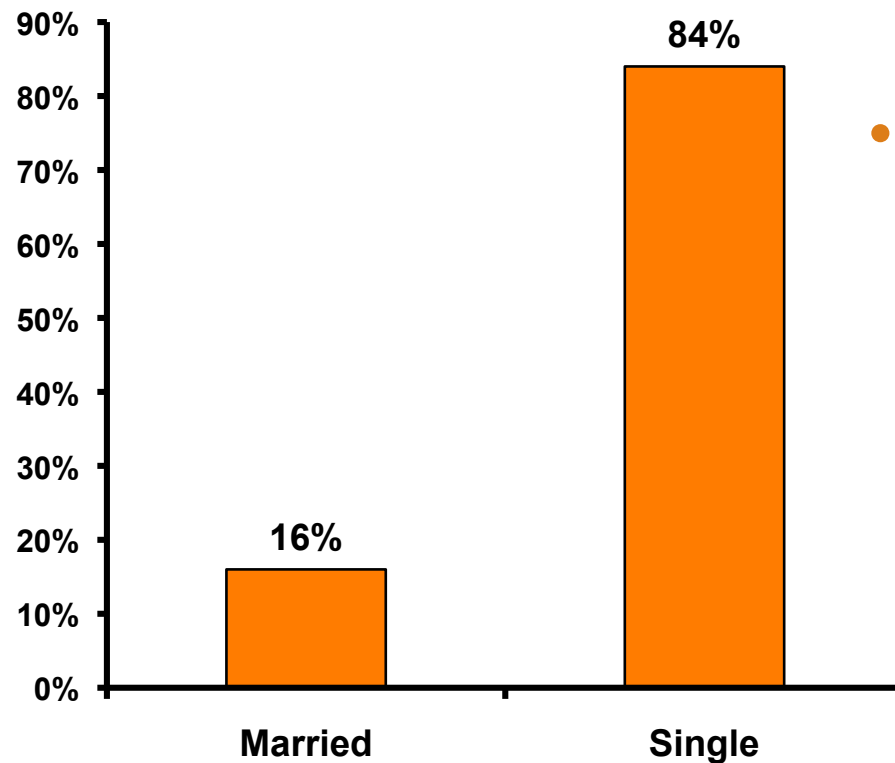
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **353** departing 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 **353** 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.

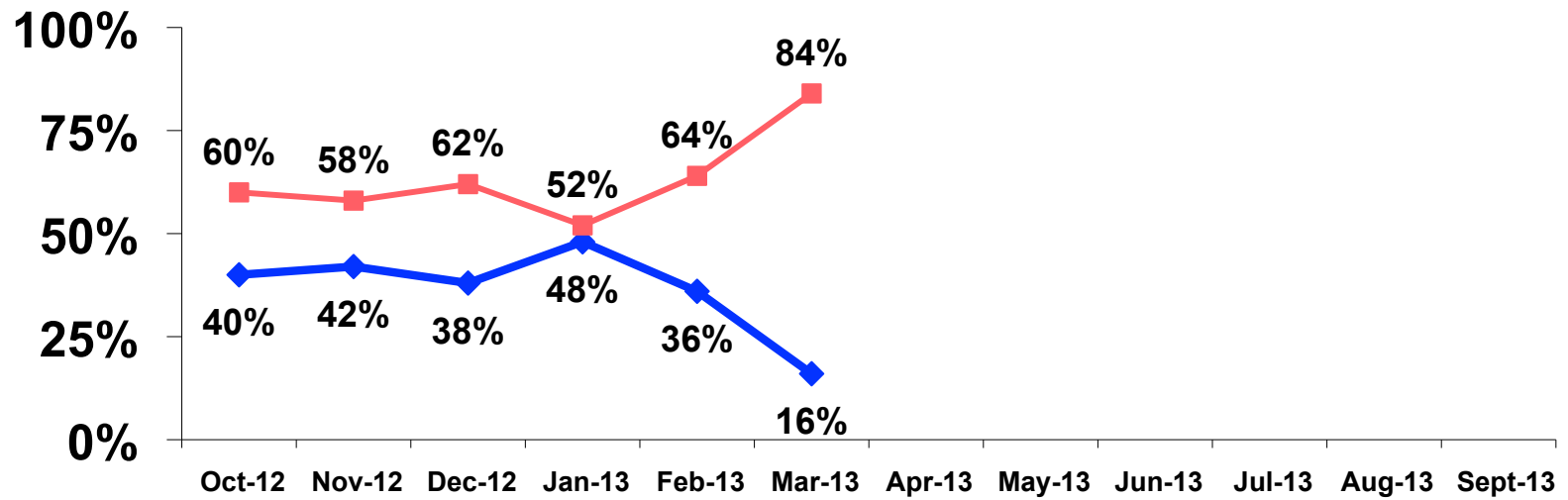
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall



- 89% of first-time visitors are single.

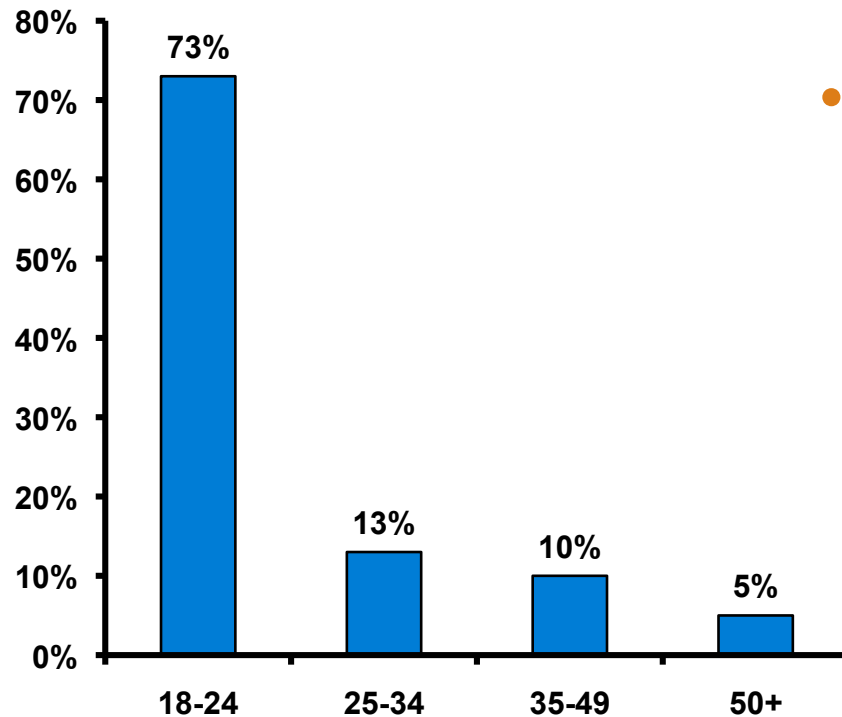
Marital Status



◆ Married

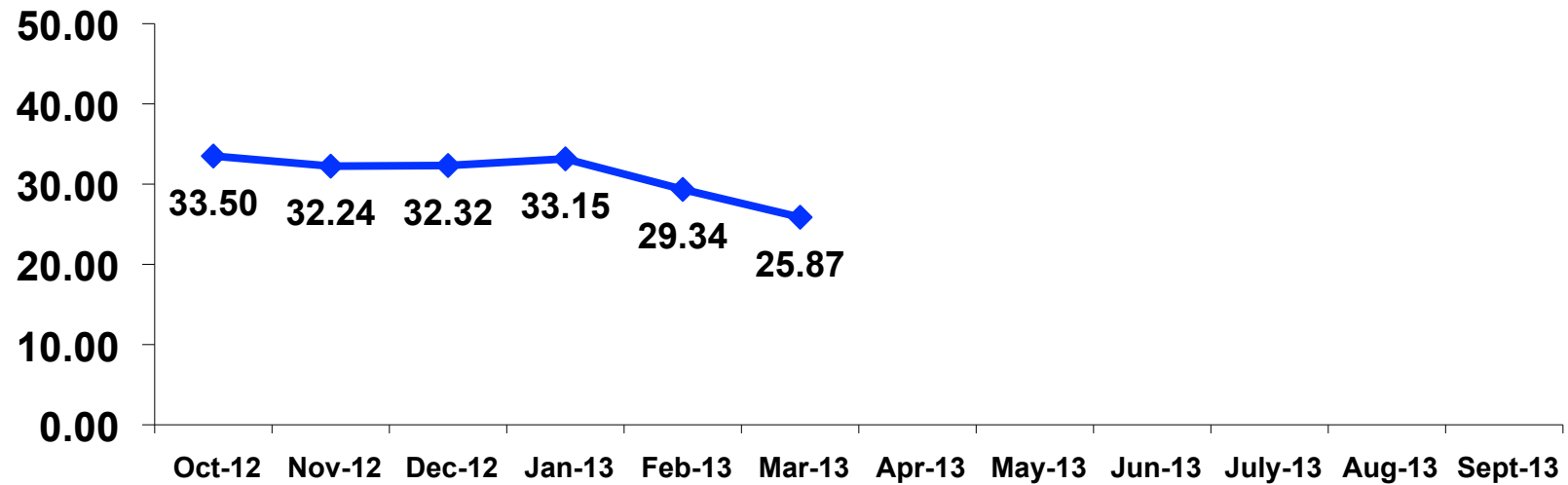
■ Single

Age - Overall

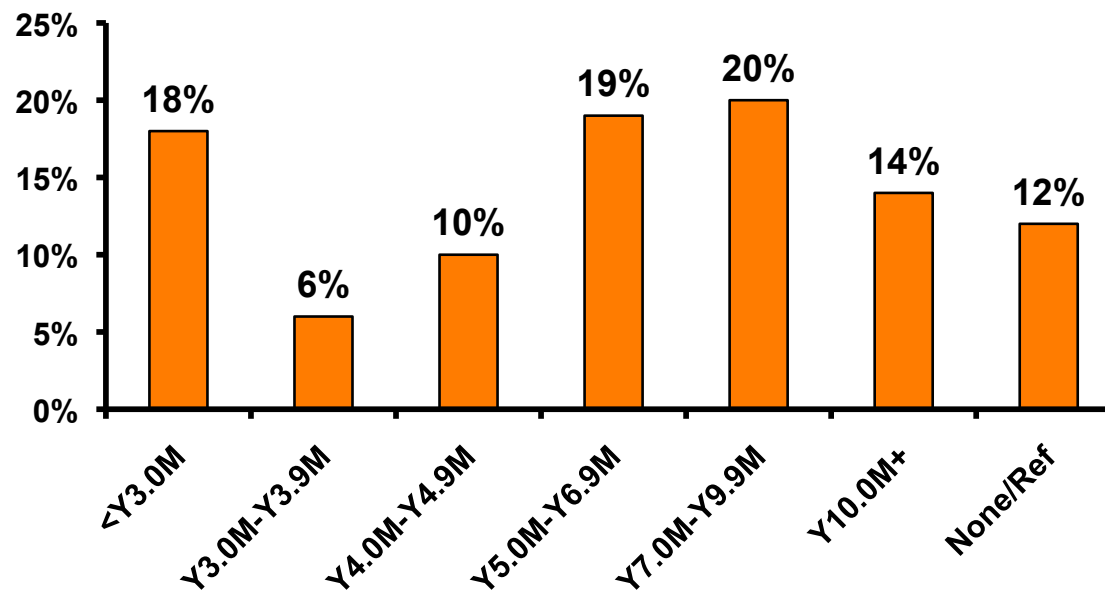


- The average age of the respondents is 25.87 years of age.

Average Age

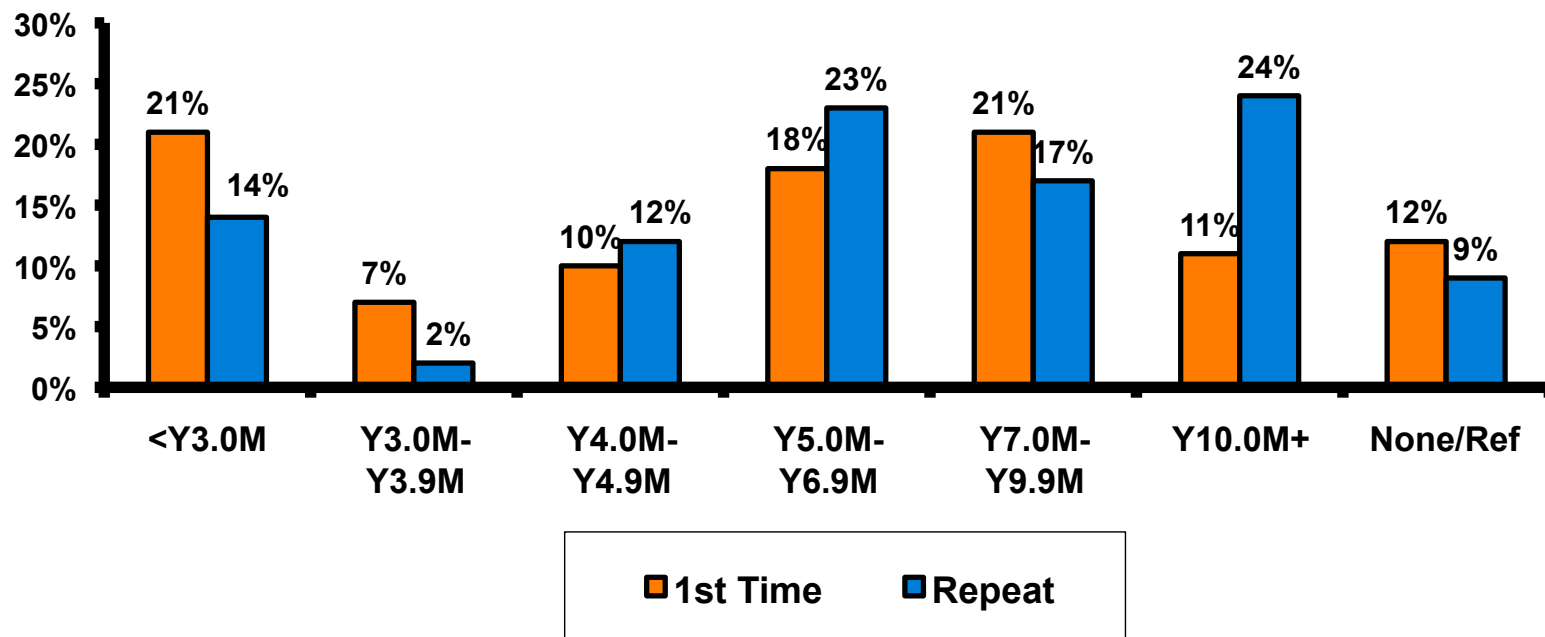


Personal Income



• ¥94.72=\$1

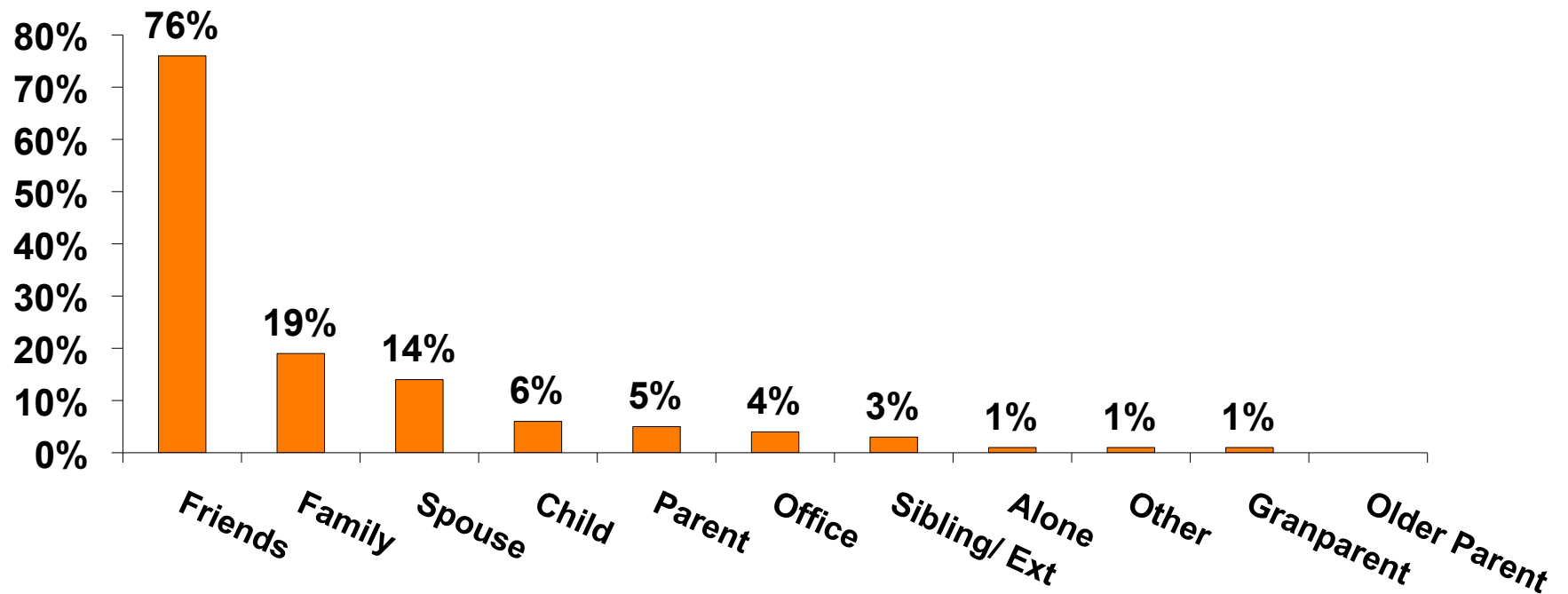
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	35	15	20	28	5	1	1
		Column N %	13%	11%	16%	15%	13%	3%	7%
Y2.0M-Y3.0M	Y2.0M-Y3.0M	Count	16	8	8	11	3	2	
		Column N %	6%	6%	6%	6%	8%	6%	
Y3.0M-Y4.0M	Y3.0M-Y4.0M	Count	16	3	13	10	4	2	
		Column N %	6%	2%	10%	5%	10%	6%	
Y4.0M-Y5.0M	Y4.0M-Y5.0M	Count	28	18	10	17	7	3	1
		Column N %	10%	13%	8%	9%	18%	10%	7%
Y5.0M-Y7.0M	Y5.0M-Y7.0M	Count	51	26	25	35	7	6	3
		Column N %	19%	19%	19%	19%	18%	19%	20%
Y7.0M-Y10.0M	Y7.0M-Y10.0M	Count	53	32	21	32	4	12	4
		Column N %	20%	23%	16%	18%	10%	39%	27%
Y10.0M+	Y10.0M+	Count	39	24	15	20	8	5	5
		Column N %	14%	17%	12%	11%	21%	16%	33%
No Income	No Income	Count	31	14	17	29	1		1
		Column N %	12%	10%	13%	16%	3%		7%
Total	Count	269	140	129	182	39	31	15	

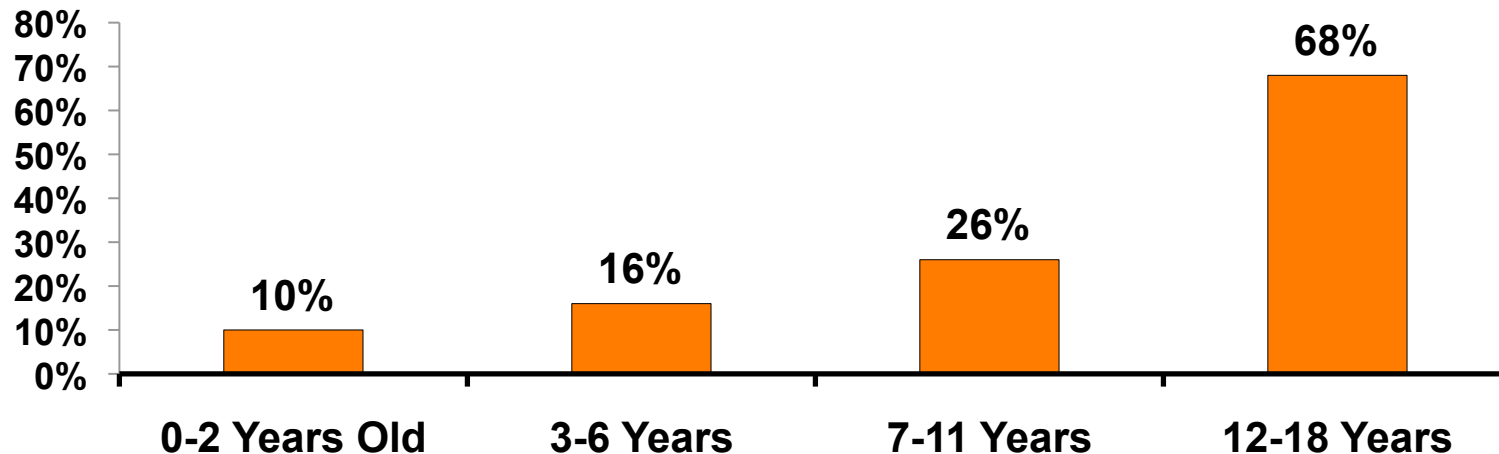
Travel Companions



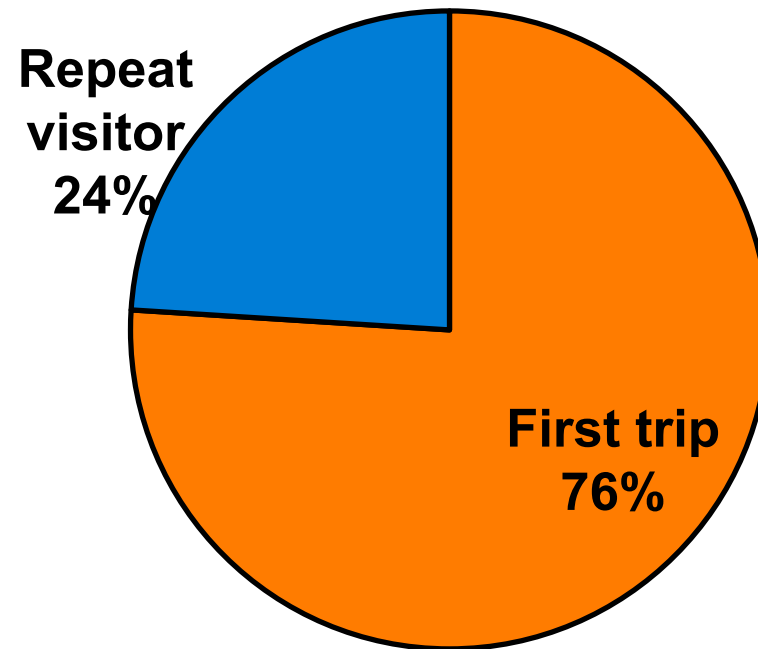
Number of Children Travel Party

N=19 total respondents traveling with children.

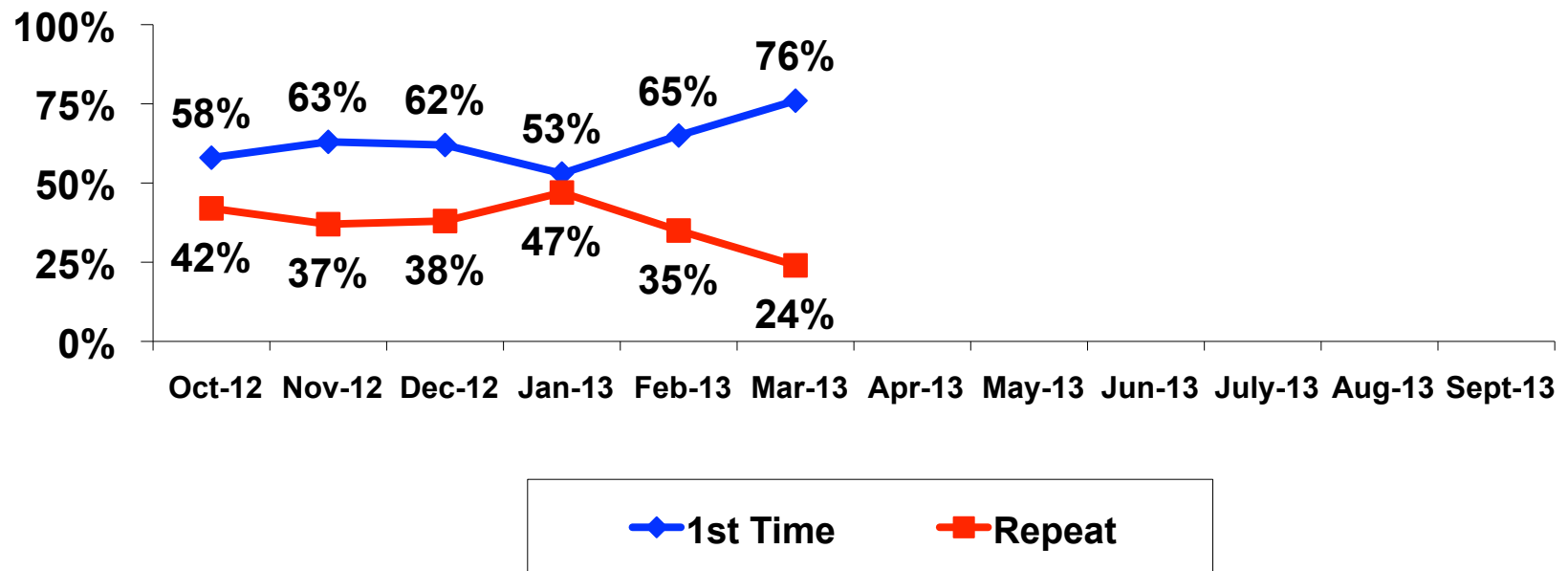
(Of those N=19 respondents, there is a total of 29 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



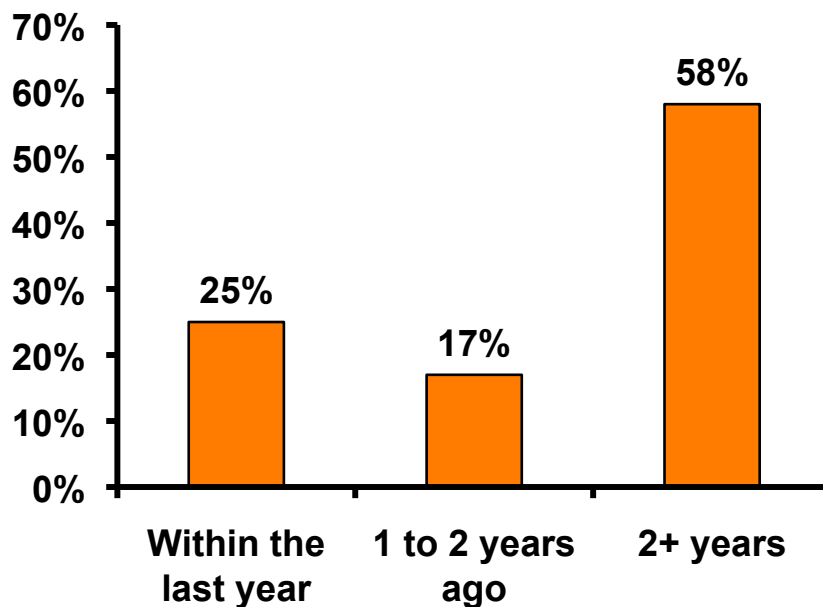
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	180	123	57
		Column N %	51%	46%	69%
	Female	Count	173	147	26
		Column N %	49%	54%	31%
	Total	Count	353	270	83
AGE	18-24	Count	255	222	33
		Column N %	73%	83%	40%
	25-34	Count	45	23	22
		Column N %	13%	9%	27%
	35-49	Count	34	16	18
		Column N %	10%	6%	22%
	50+	Count	17	7	10
		Column N %	5%	3%	12%
	Total	Count	351	268	83

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

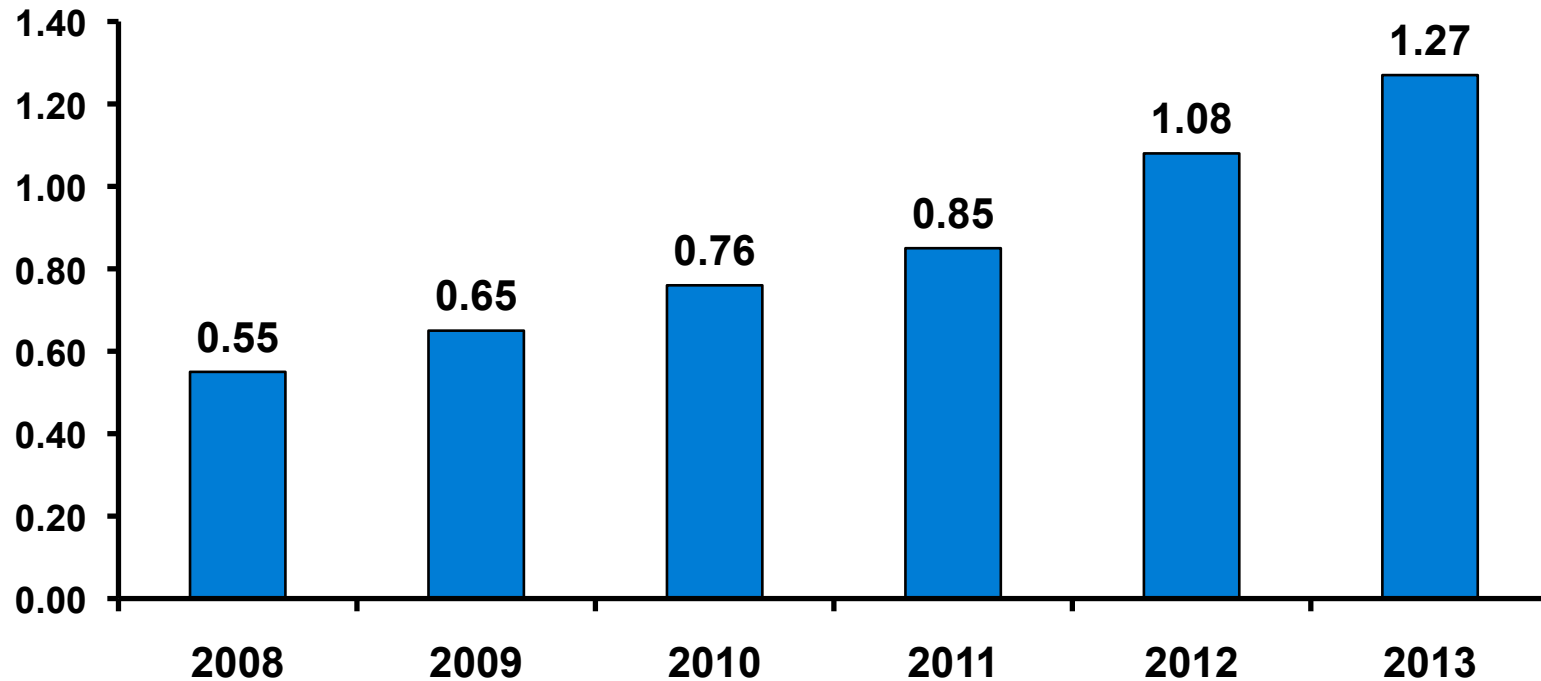
Repeat Visitors Last Trip

n = 81



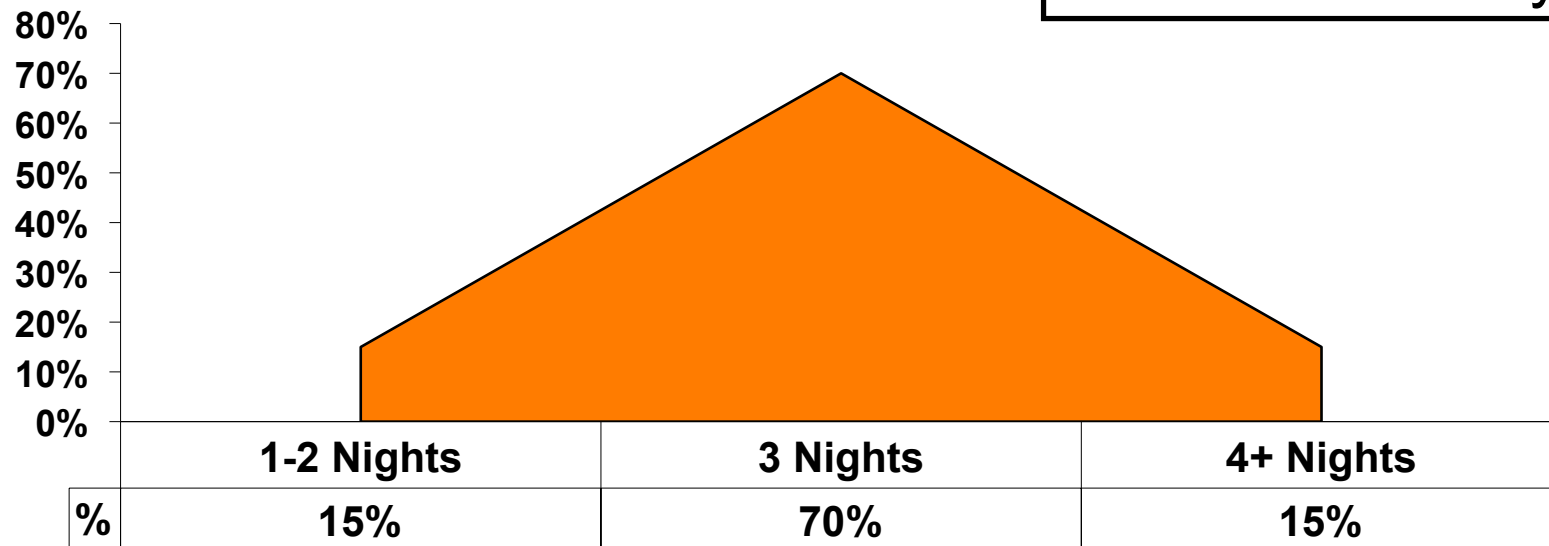
- The average repeat visitor has been to Guam 2.81 times.
- Less than half of the repeat visitors have been to Guam within the last 2 years.

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

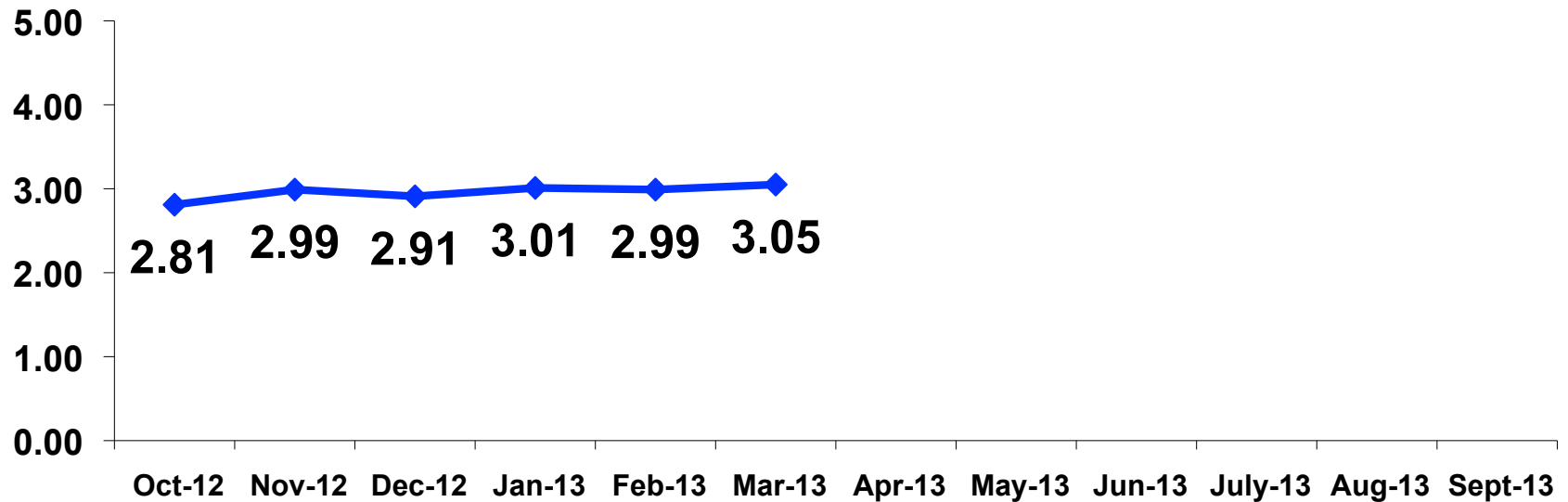


Length of Stay

Mean = 3.05 Days
Median = 3.0 Days



Average Length of Stay

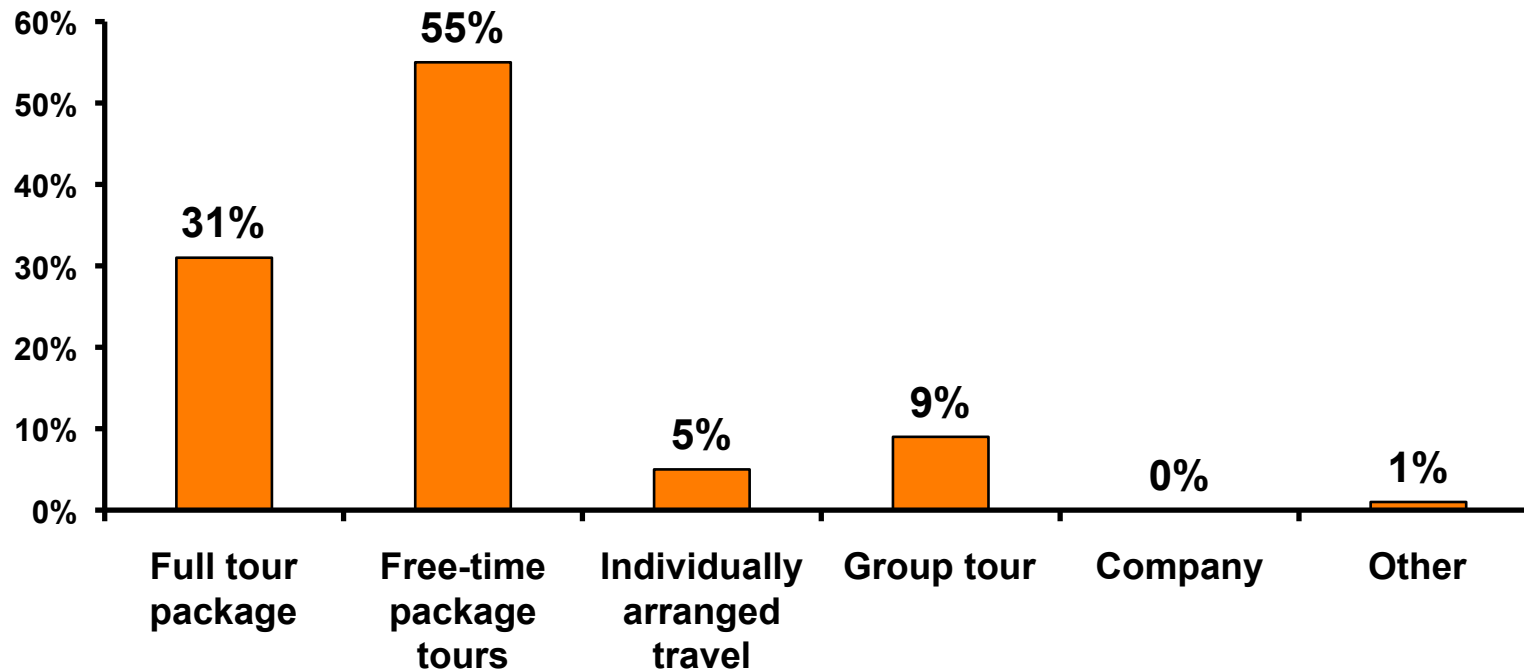


Occupation by Income

		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	69%	66%	69%	56%	43%	69%	60%	54%	97%	
	Office worker non-mgr	6%		6%	25%	4%	12%	8%	5%		
	Engineer	6%		6%	6%	18%	10%	8%	5%		
	Self-employed	3%	6%				2%	4%	13%		
	Freeter	3%	14%	6%		4%			3%		
	Skilled worker	2%	6%		13%	4%		4%			
	Salesperson	2%				4%	2%	2%	8%		
	Other	1%	3%			4%		2%			
	Homemaker	1%		6%		7%		2%	3%		
	Professional/ Specialist	1%	3%			4%	2%	2%	3%		
	Manager	1%						6%	5%		
	Unemployed	1%	3%			4%				3%	
	Govt- office worker non-mgr	1%				4%	4%				
	Retired	1%		6%					3%		
	Executive (30+ employees)	1%				4%		2%			
	Govt- Manager	0%						2%			
	Total	Count	340	35	16	16	28	51	53	39	31

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

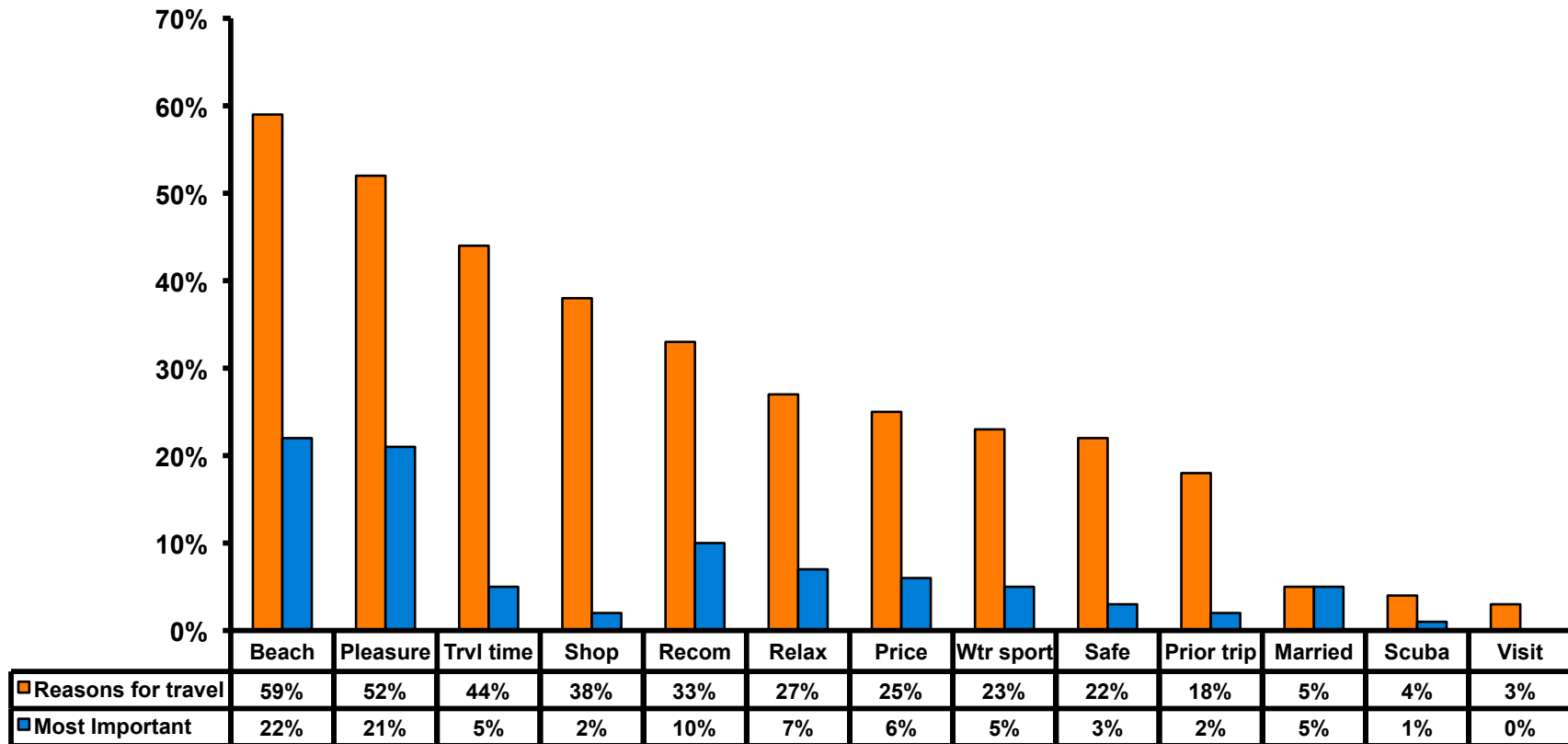


Accommodation by Income

Average length of stay: 3.05 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	13%	6%	6%	13%	7%	16%	17%	26%	6%	
	Guam Reef Hotel	13%	18%	25%	7%	25%	8%	8%	5%	3%	
	Outrigger Guam Resort	8%	6%	13%	40%	14%	6%	8%	10%		
	Fiesta Resort Guam	6%	6%			7%	8%	8%	8%	6%	
	Hilton Guam Resort	5%	6%				8%	8%	10%		
	Oceanview Hotel	5%	3%	6%		7%	6%	4%	5%	6%	
	Holiday Resort Guam	5%	3%	6%	7%	4%	4%	6%		6%	
	Guam Marriott Resort	5%	9%	6%	13%	7%		6%	3%		
	Grand Plaza Hotel	4%					6%	4%		6%	
	Bayview Hotel	4%	3%	13%		4%	6%		3%	13%	
	Ramada Suites Guam	4%	6%				8%	6%		3%	
	Hotel Nikko Guam	4%	3%			7%	4%	8%	5%	6%	
	Pacific Bay Hotel	4%	6%			4%	4%	2%	5%		
	PIC Club	4%			7%	7%	4%		5%	10%	
	Hotel Santa Fe	3%	9%				4%	6%		6%	
	Onward Beach Resort	3%	9%			4%		2%		6%	
	Royal Orchid Guam	3%		6%	7%		4%	2%	3%	3%	
	Sheraton Laguna Guam	2%		6%			2%	4%	5%	3%	
	Westin Resort Guam	2%	6%		7%	4%	2%		3%		
	Condo	1%		6%			2%			3%	
	Hyatt Regency Guam	1%	3%	6%				4%	3%		
	Other	1%							3%	6%	
	Home stay/ friend/ relative	0%						2%			
	Guam Aurora Resort	0%								3%	
	Total	Count	351	34	16	15	28	51	53	39	31

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure
- Recommendations

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	59%	61%	49%	56%	65%	53%	66%	
	Pleasure	52%	54%	40%	53%	59%	45%	60%	
	Short travel time	44%	39%	44%	71%	53%	44%	43%	
	Shopping	38%	39%	40%	29%	35%	28%	47%	
	Recomm- friend/family/trvl agnt	33%	39%	24%	18%	6%	26%	40%	
	Relax	27%	22%	31%	50%	53%	24%	31%	
	Price	25%	27%	24%	12%	24%	21%	29%	
	Water sports	23%	26%	18%	15%	12%	24%	21%	
	Safe	22%	20%	24%	29%	35%	21%	23%	
	Previous trip	18%	9%	36%	47%	53%	23%	12%	
	Other	8%	11%		3%		7%	9%	
	Married/ Attn wedding	5%	2%	16%	6%	18%	6%	3%	
	Scuba	4%	4%	9%			7%	1%	
	Company/ Business Trip	3%	2%	16%	3%		4%	3%	
	Visit friends/ Relatives	3%	2%	7%		6%	3%	2%	
	Honeymoon	2%	1%	11%		6%	4%	1%	
	Organized sports	1%	0%	2%	3%		2%		
	Golf	1%			6%	6%	2%		
	Company Sponsored	1%	0%		3%		1%		
	Career Cert/ Testing	0%				6%	1%		
	Total	Count	352	254	45	34	17	179	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	59%	63%	53%	69%	61%	57%	62%	64%	71%	
	Pleasure	52%	57%	47%	81%	54%	57%	47%	49%	45%	
	Short travel time	44%	37%	27%	50%	43%	49%	53%	41%	48%	
	Shopping	38%	40%	33%	56%	46%	35%	30%	38%	29%	
	Recomm- friend/family/trvl agnt	33%	40%	60%	38%	14%	33%	38%	23%	42%	
	Relax	27%	29%	20%	50%	32%	25%	25%	33%	29%	
	Price	25%	46%	40%	25%	18%	31%	19%	13%	45%	
	Water sports	23%	29%	27%	31%	11%	25%	23%	28%	23%	
	Safe	22%	23%	7%	25%	39%	16%	25%	26%	16%	
	Previous trip	18%	11%	27%	6%	25%	20%	15%	28%	13%	
	Other	8%	11%			14%	8%	4%	5%		
	Married/ Attn wedding	5%	3%	13%		14%	8%	2%	8%		
	Scuba	4%	6%			4%	6%	8%	5%	3%	
	Company/ Business Trip	3%	3%	7%	6%	11%	2%		5%		
	Visit friends/ Relatives	3%	6%	7%			2%	2%	3%	3%	
	Honeymoon	2%			6%	11%		2%	5%		
	Organized sports	1%					2%	2%		3%	
	Golf	1%					2%	2%		3%	
	Company Sponsored	1%	3%					2%			
	Career Cert/ Testing	0%							3%		
	Total	Count	352	35	15	16	28	51	53	39	31

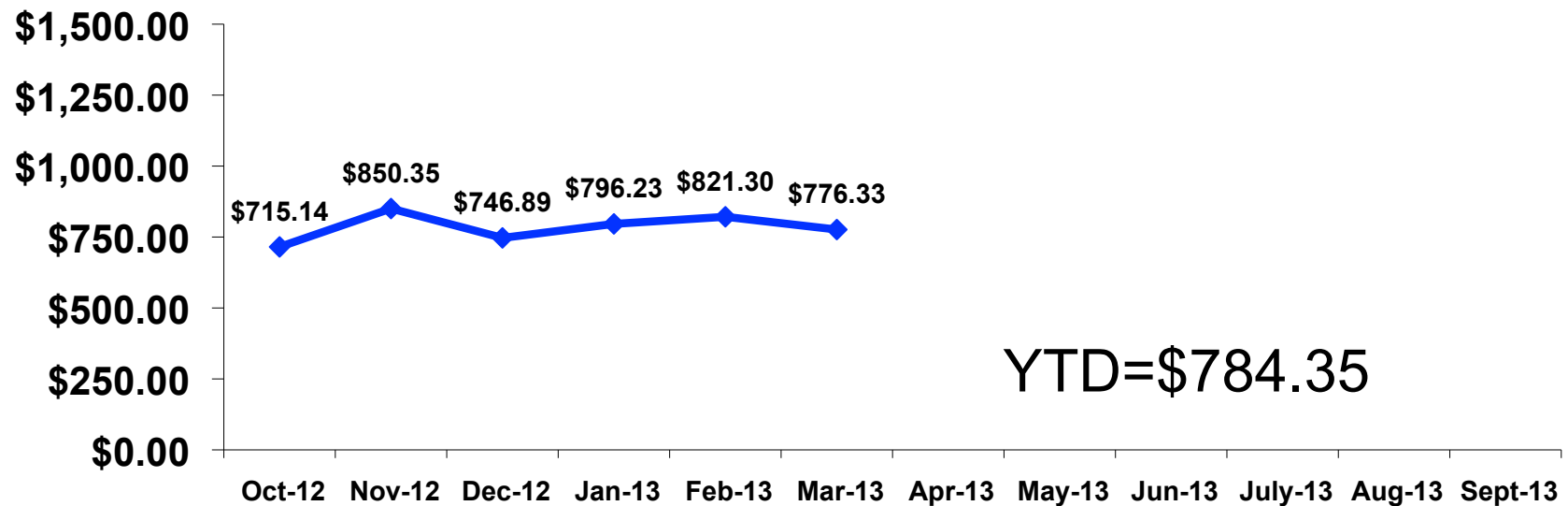
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥94.72/US\$1

- \$1,251.58 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$21,115 = maximum (highest amount recorded for the entire sample)
- \$776.33 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

¥94.72=\$1

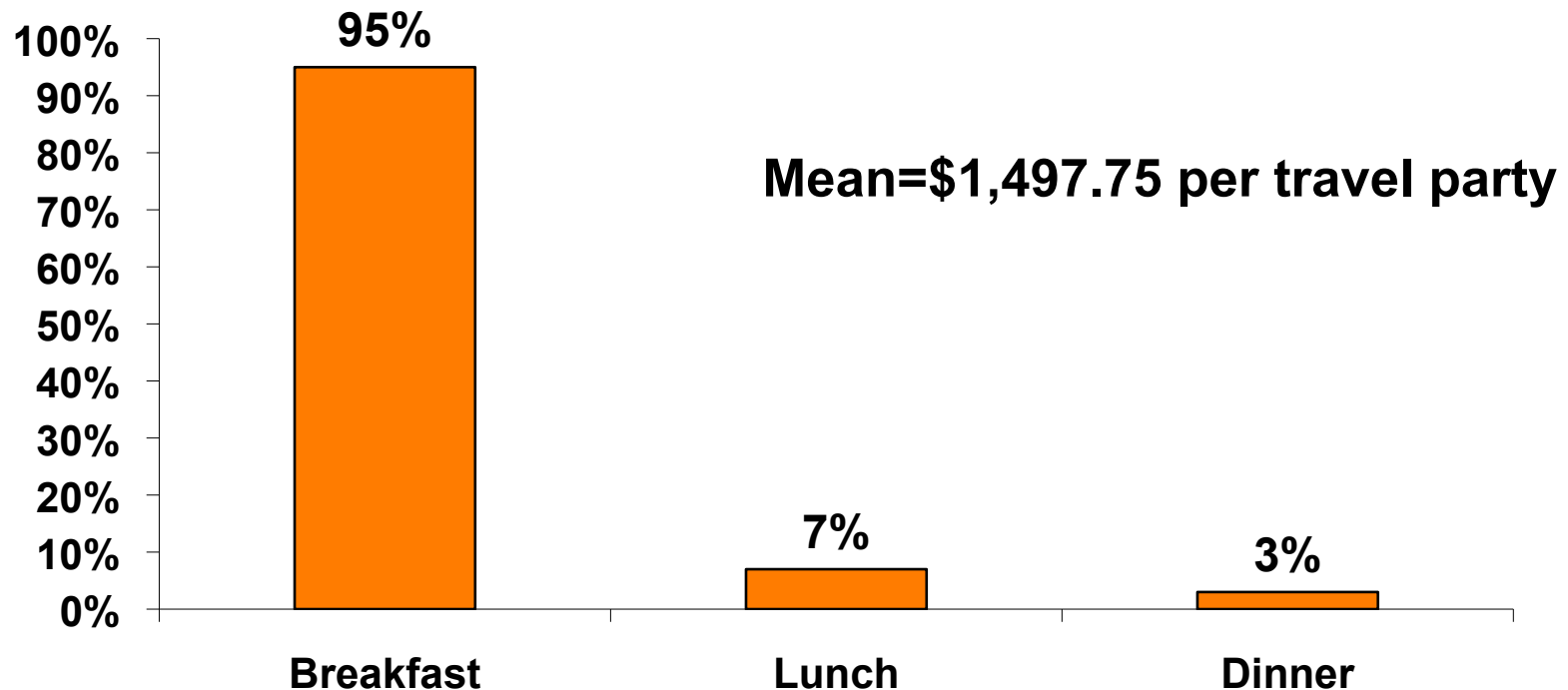
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,223.66
Air & Accommodation w/ daily meal package	\$1,497.75
Air only	\$800.25
Accommodation only	\$211.15
Accommodation w/ daily meal only	\$316.72
Food & Beverages in Hotel	\$-
Ground transportation - Japan	\$71.98
Ground transportation - Guam	\$38.71
Optional tours/ activities	\$210.02
Other expenses	\$366.87
Total Prepaid	\$1,251.58

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

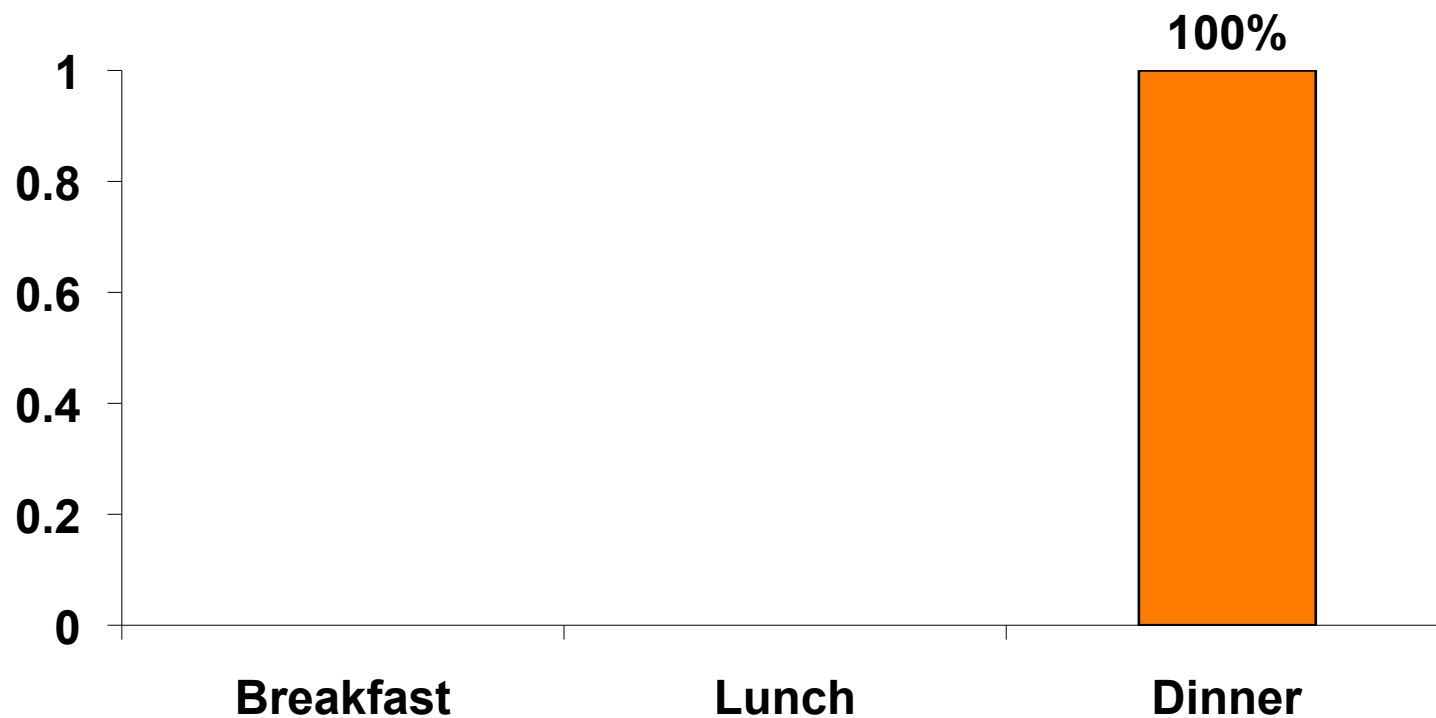
n=101



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

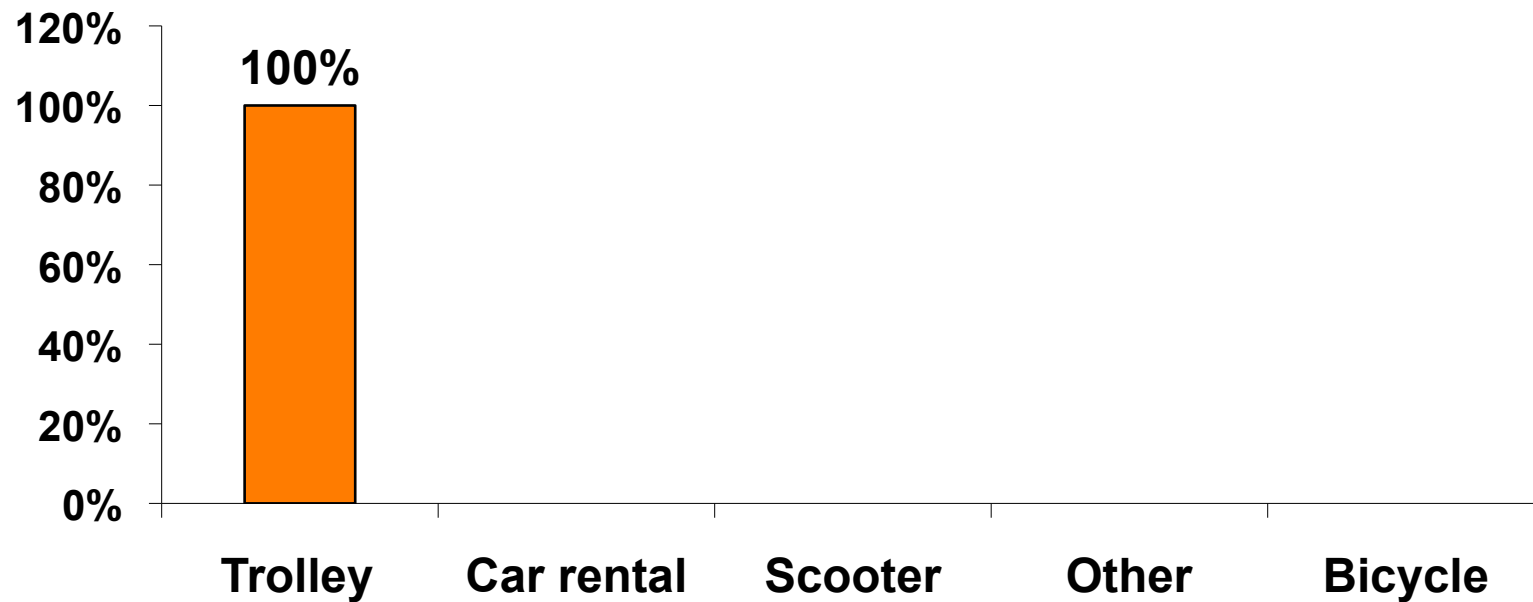
n=1



Mean=\$316.72 per travel party

Prepaid Transportation Breakdown

n=4

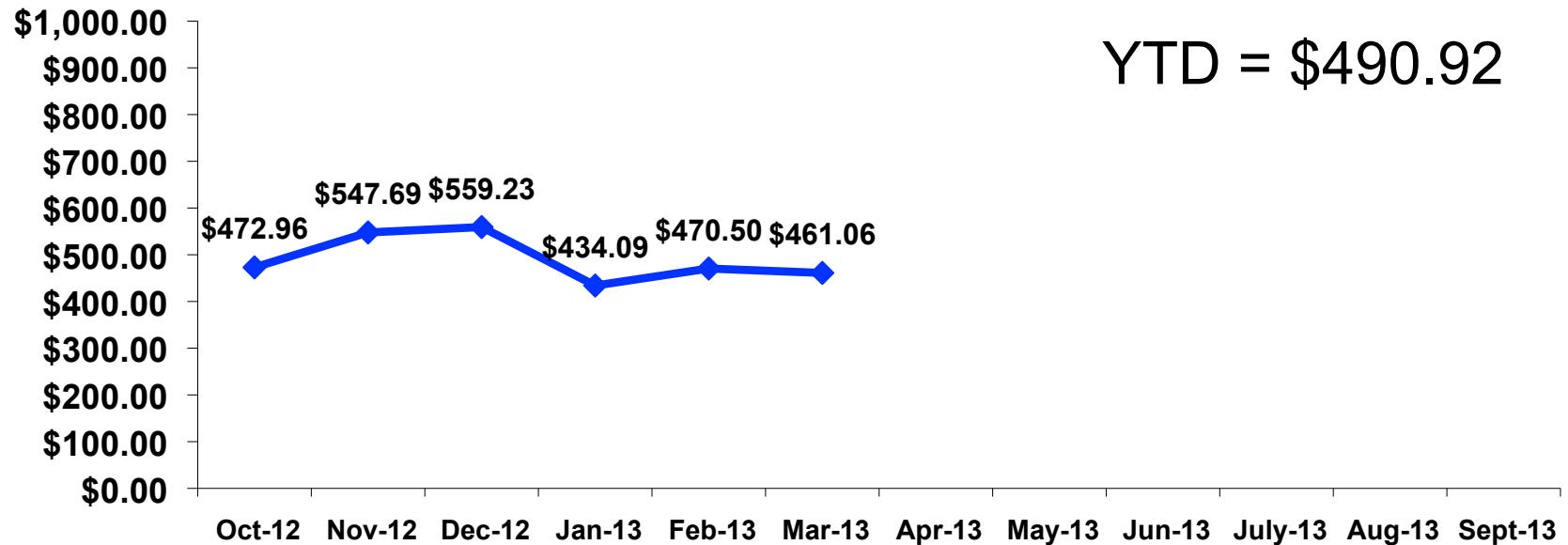


Mean=\$38.71 per travel party

On-Island Expenditures

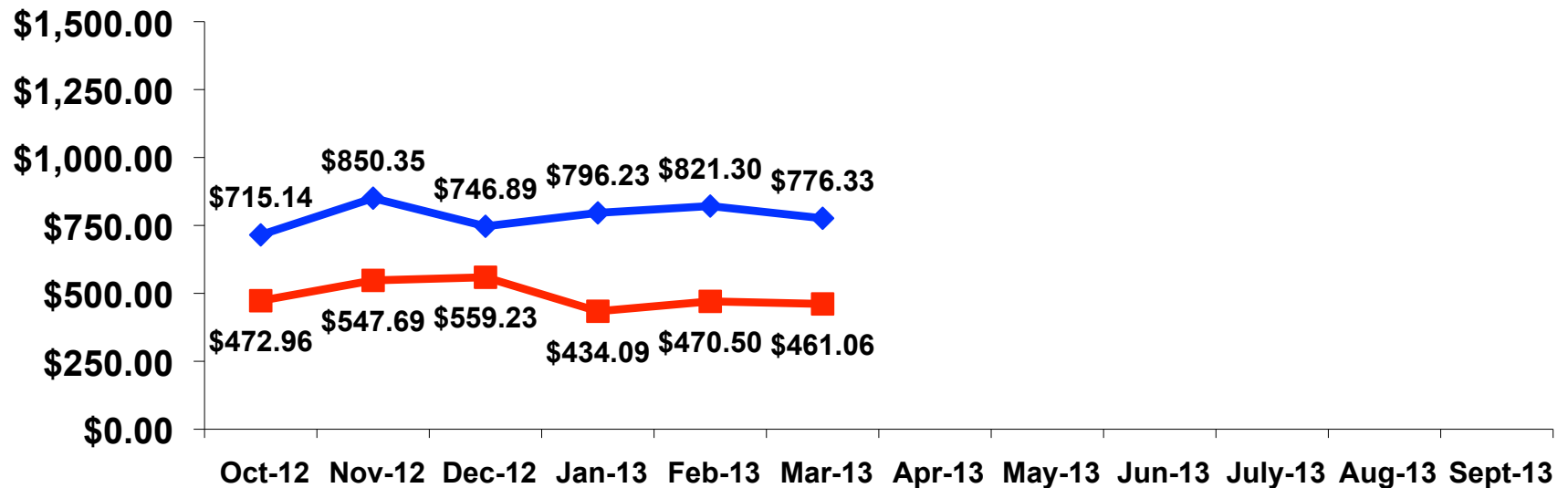
- \$639.18 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,000 = Maximum (highest amount recorded for the entire sample)
- \$461.06 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person



Prepaid/On-Island Expenditures Per Person

Prepaid YTD = \$784.35 On-Island YTD = \$490.92



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	\$461.06	\$492.58	\$428.28	\$435.83	\$557.29	\$672.60	\$482.78	\$396.32	\$468.49	\$952.50	\$411.11
	Median	\$400	\$400	\$375	\$400	\$450	\$490	\$393	\$352	\$530	\$761	\$500
	Minimum	\$0	\$0	\$0	\$0	\$36	\$0	\$50	\$0	\$0	\$100	\$233
	Maximum	\$3,000	\$2,500	\$3,000	\$2,255	\$1,500	\$2,500	\$2,250	\$1,708	\$860	\$3,000	\$500

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$24.15	\$36.07	\$11.75	\$11.24	\$55.18	\$61.29	\$62.94
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.90	\$40.27	\$23.18	\$22.90	\$28.07	\$76.76	\$90.59
	Median	\$10	\$10	\$10	\$5	\$15	\$35	\$40
F&B RESTRNT	Mean	\$69.97	\$87.77	\$51.45	\$50.09	\$89.64	\$144.59	\$170.24
	Median	\$10	\$0	\$20	\$0	\$25	\$100	\$64
OPT TOUR	Mean	\$61.02	\$82.11	\$39.07	\$48.35	\$60.31	\$157.79	\$57.65
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$146.09	\$181.35	\$109.61	\$94.61	\$142.70	\$493.09	\$250.00
	Median	\$28	\$5	\$30	\$20	\$60	\$100	\$0
GIFT- OTHER	Mean	\$96.84	\$100.56	\$92.98	\$74.14	\$96.58	\$257.74	\$123.88
	Median	\$50	\$30	\$60	\$40	\$80	\$200	\$50
TRANS	Mean	\$9.93	\$8.33	\$11.60	\$6.10	\$11.27	\$37.15	\$10.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$202.58	\$252.08	\$151.08	\$168.67	\$276.89	\$257.53	\$412.94
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$639.18	\$782.41	\$490.15	\$472.16	\$757.47	\$1,485.71	\$1,178.24
	Median	\$499	\$500	\$400	\$400	\$700	\$1,000	\$700

On-Island Expenditures

First Timers & Repeaters

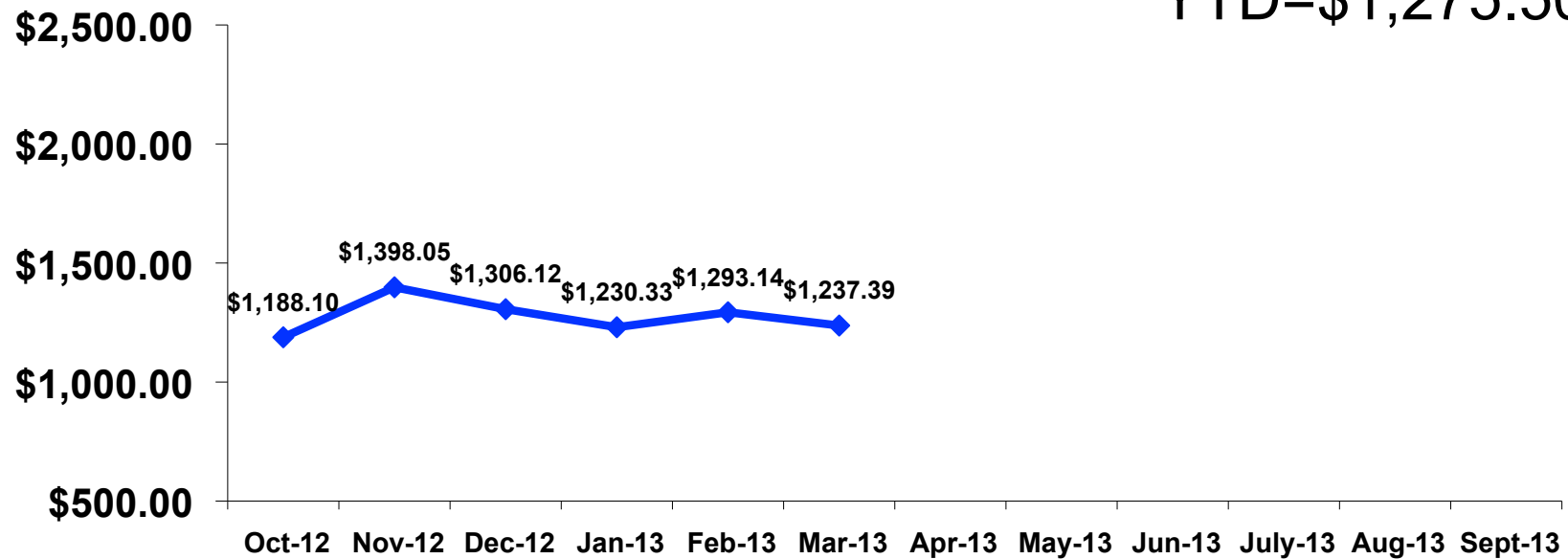
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$24.15	\$14.35	\$56.02
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.90	\$25.18	\$53.75
	Median	\$10	\$7	\$20
F&B RESTRNT	Mean	\$69.97	\$62.34	\$94.77
	Median	\$10	\$0	\$50
OPT TOUR	Mean	\$61.02	\$57.10	\$73.76
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$146.09	\$98.31	\$300.95
	Median	\$28	\$20	\$60
GIFT- OTHER	Mean	\$96.84	\$90.28	\$118.20
	Median	\$50	\$48	\$50
TRANS	Mean	\$9.93	\$7.51	\$17.82
	Median	\$0	\$0	\$0
OTHER	Mean	\$202.58	\$178.75	\$280.11
	Median	\$0	\$0	\$0
TOTAL	Mean	\$639.18	\$528.68	\$998.64
	Median	\$499	\$400	\$700

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,237.39 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$11,057 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

YTD=\$1,275.50

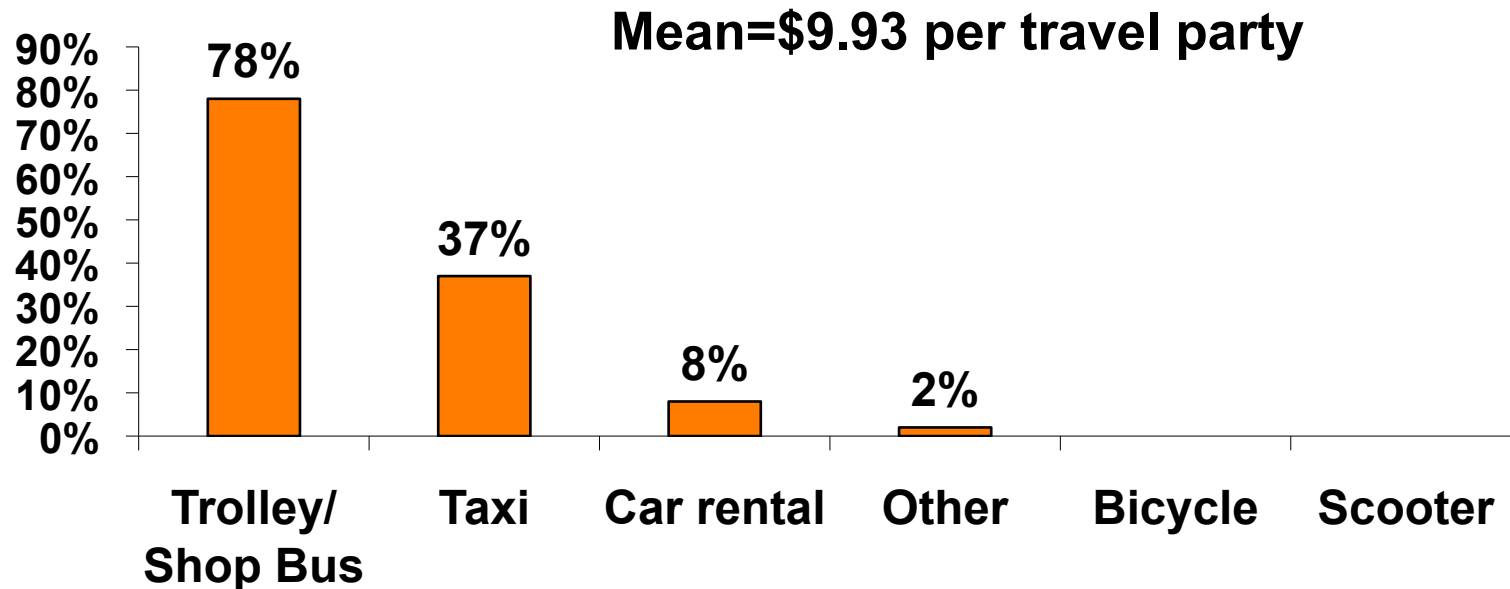


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$24.15
Food & beverage in fast food restaurant/ convenience store	\$31.90
Food & beverage at restaurants or drinking establishments outside a hotel	\$69.97
Optional tours and activities	\$61.02
Gifts/ souvenirs for yourself/companions	\$146.09
Gifts/ souvenirs for friends/family at home	\$96.84
Local transportation	\$9.93
Other expenses not covered	\$202.58
Average Total	\$639.18

Local Transportation

n=63



Guam Airport Expenditures

- \$23.07 = Mean
- \$0 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$550 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

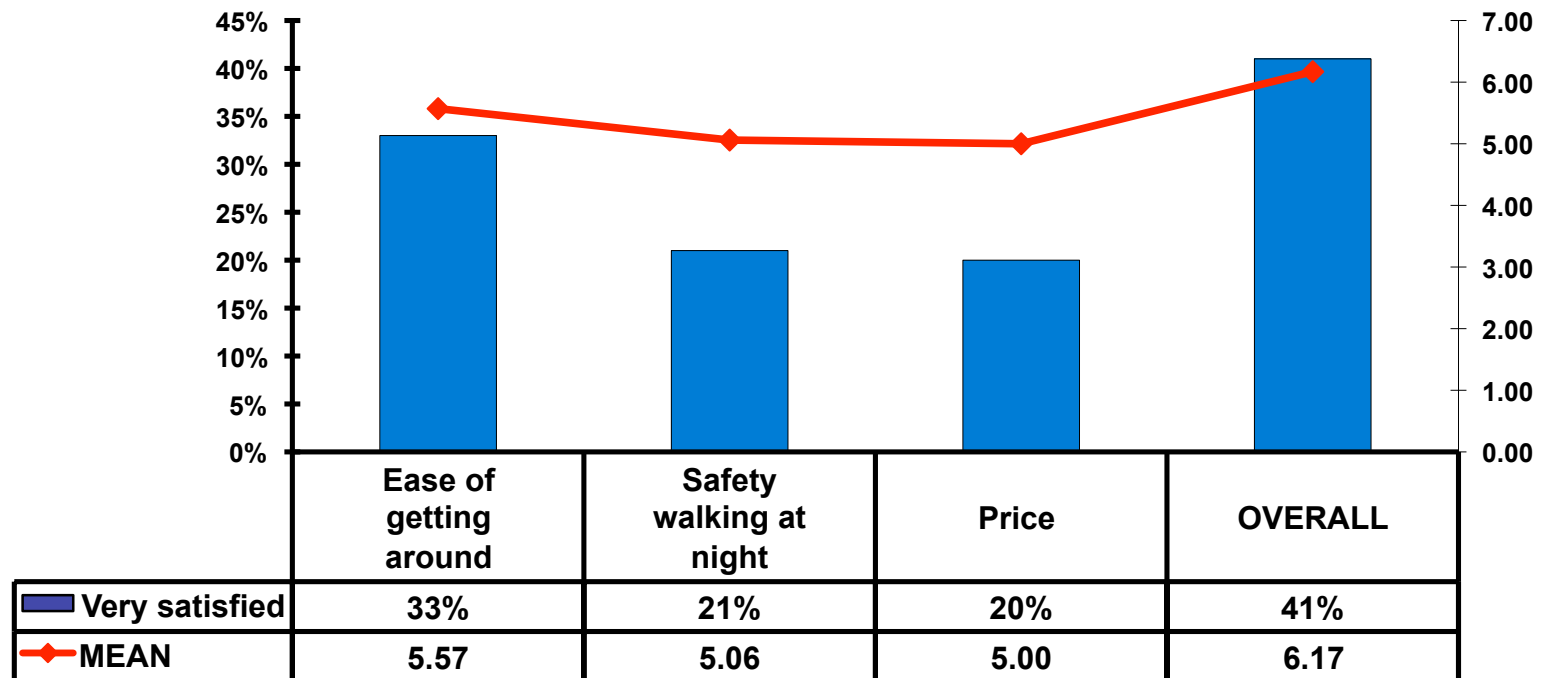
	MEAN \$
Food & Beverages	\$6.07
Gifts/Souvenirs Self	\$5.51
Gifts/Souvenirs Others	\$11.50
Total	\$23.07

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

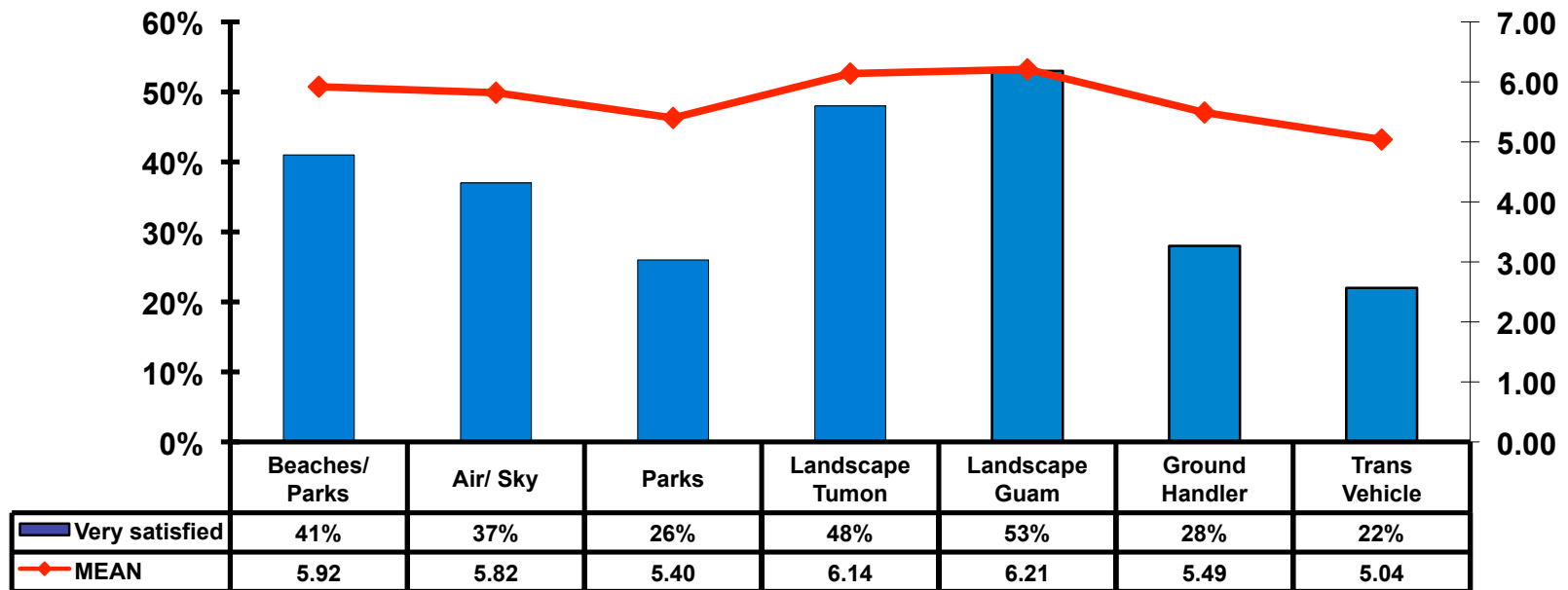
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

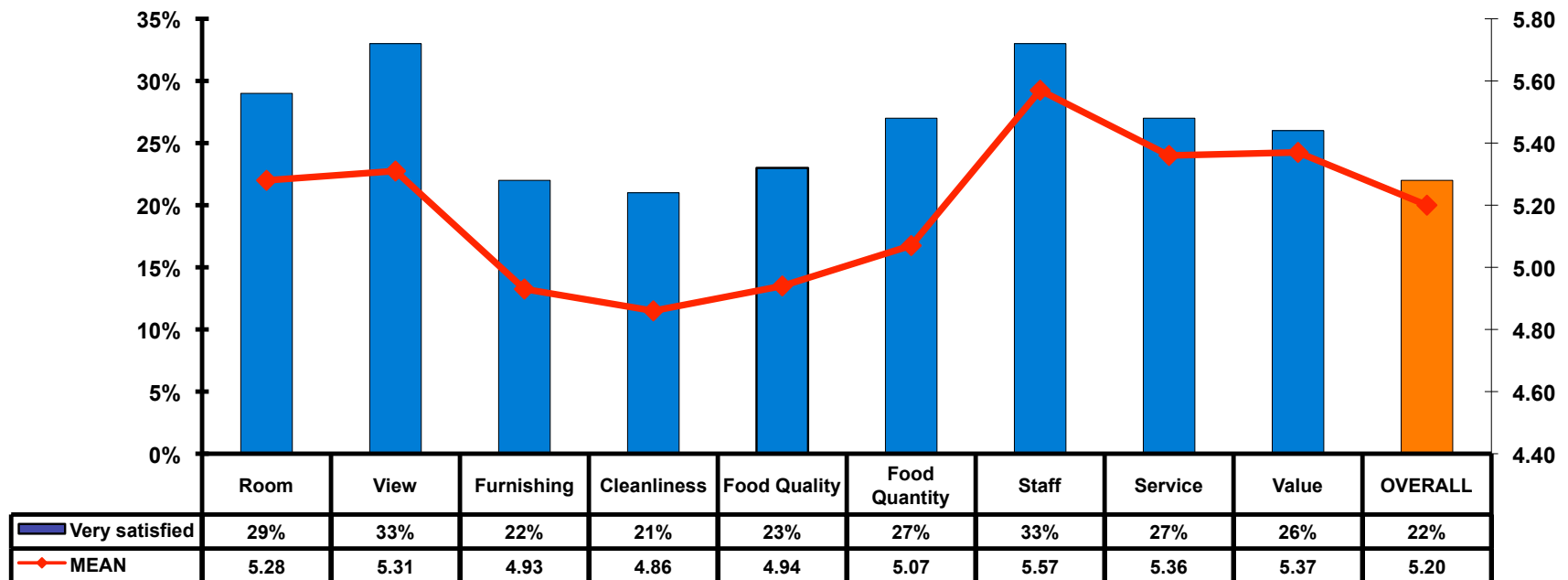
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

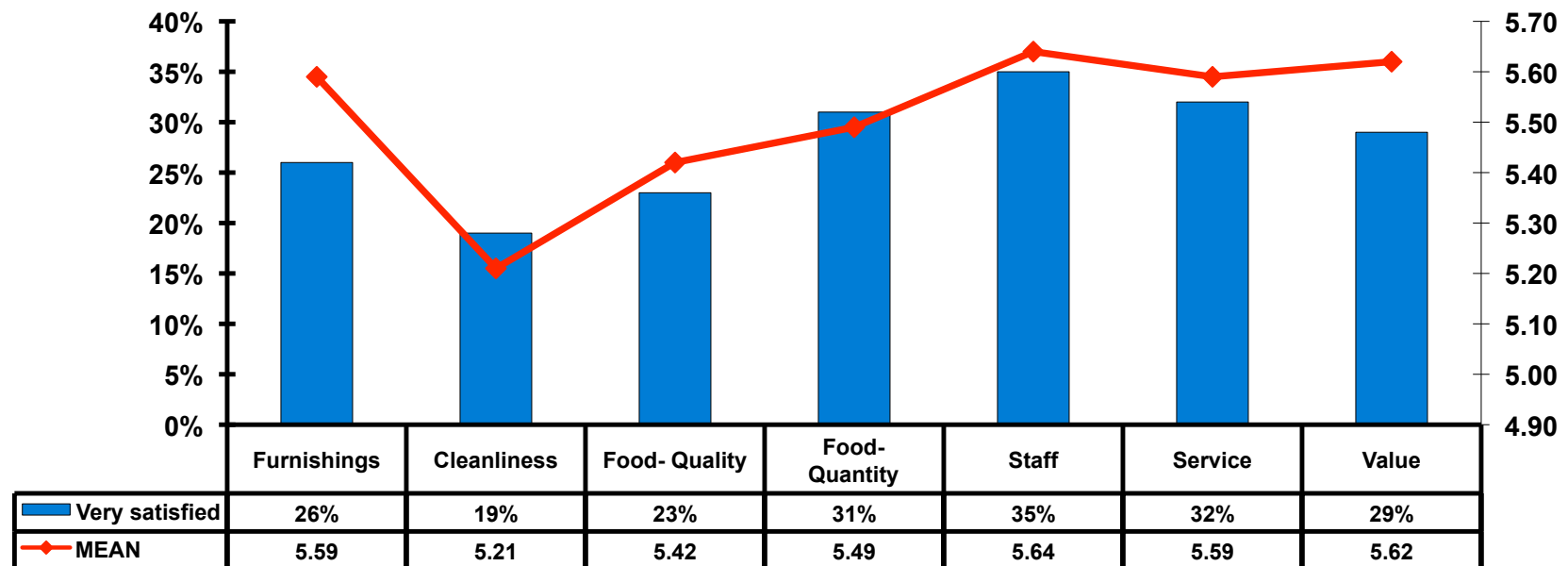
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

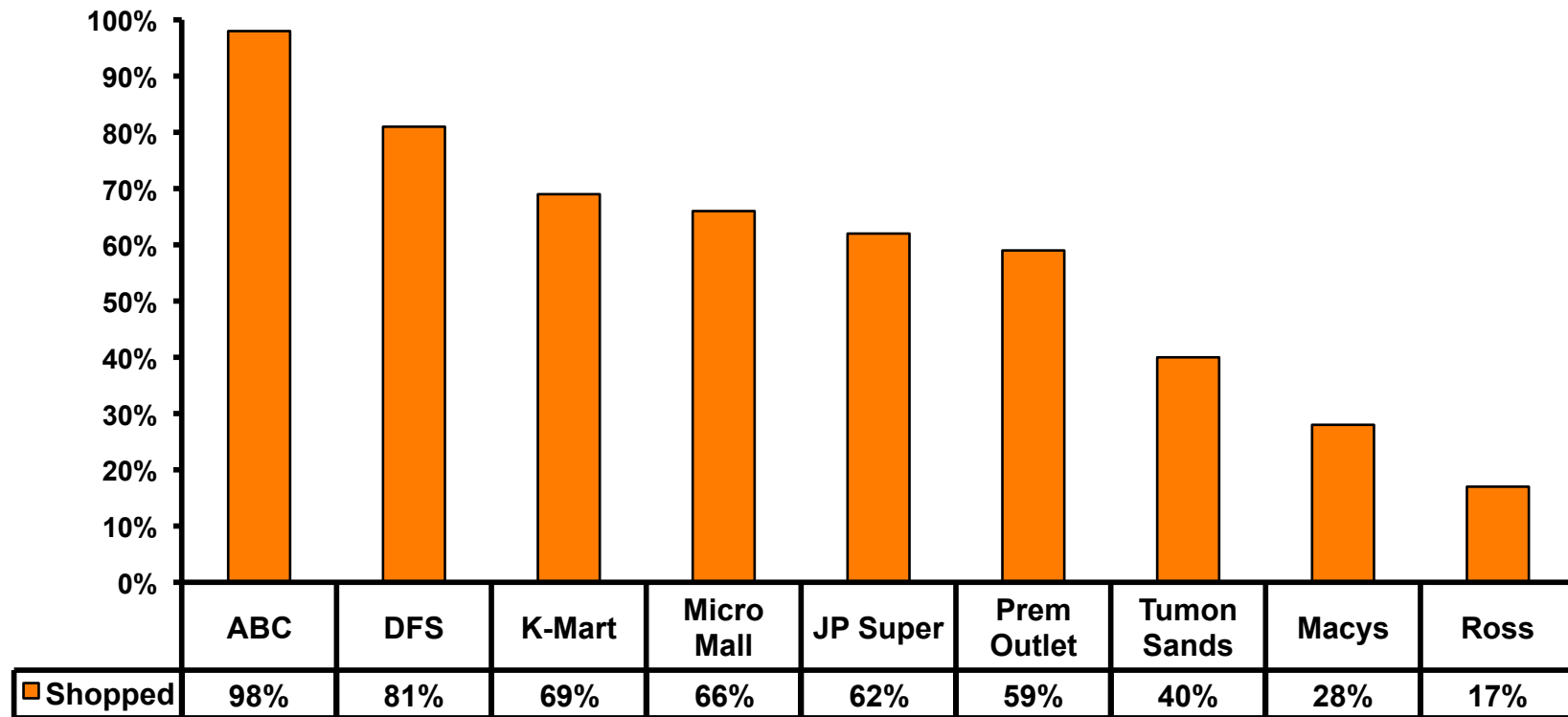
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

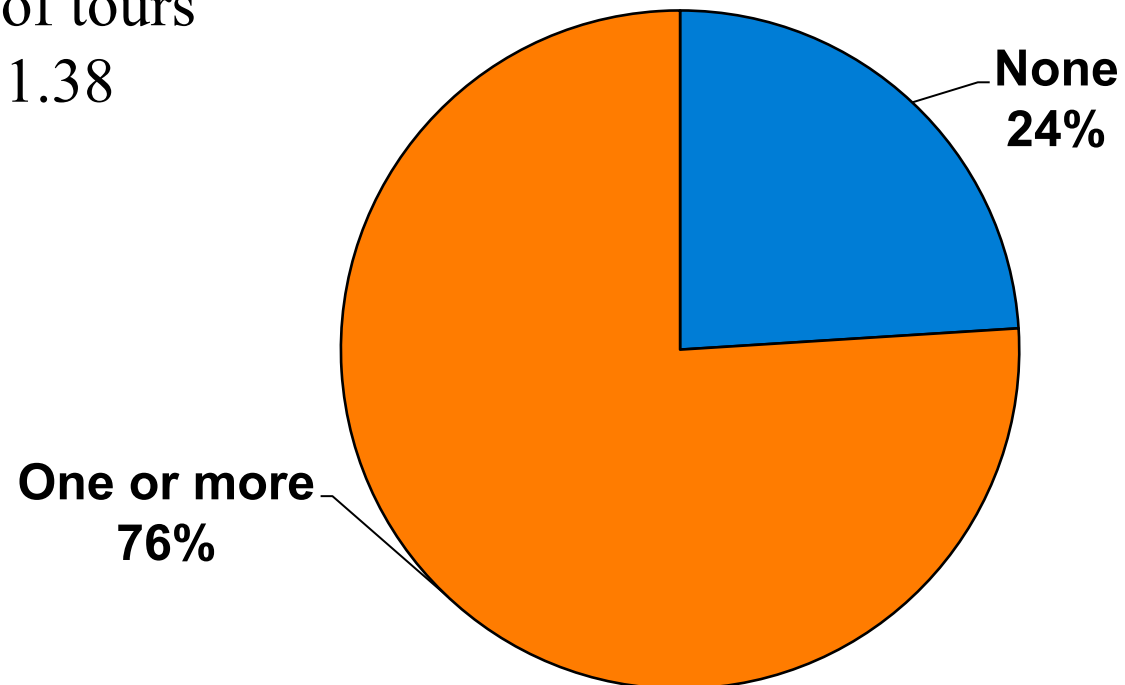
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

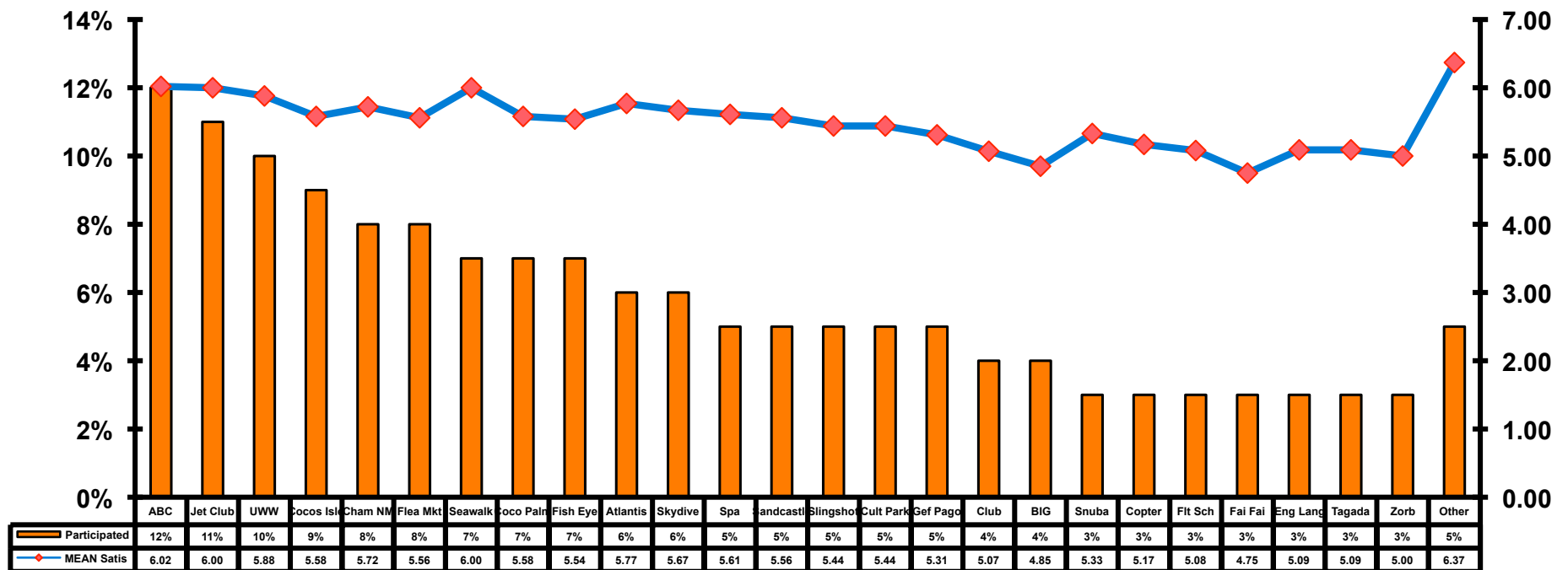
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 65%	Score of 6 to 7 = 64%
Score of 4 to 5 = 31%	Score of 4 to 5 = 32%
Score 1 to 3 = 4%	Score 1 to 3 = 4%
MEAN = 5.77	MEAN = 5.71

Optional Tour Participation

- Average number of tours participated in is 1.38



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 = 66%	Score of 6 to 7 = 64%
Score of 4 to 5 = 31%	Score of 4 to 5 = 33%
Score 1 to 3 = 2%	Score 1 to 3 = 3%
MEAN = 5.76	MEAN = 5.69

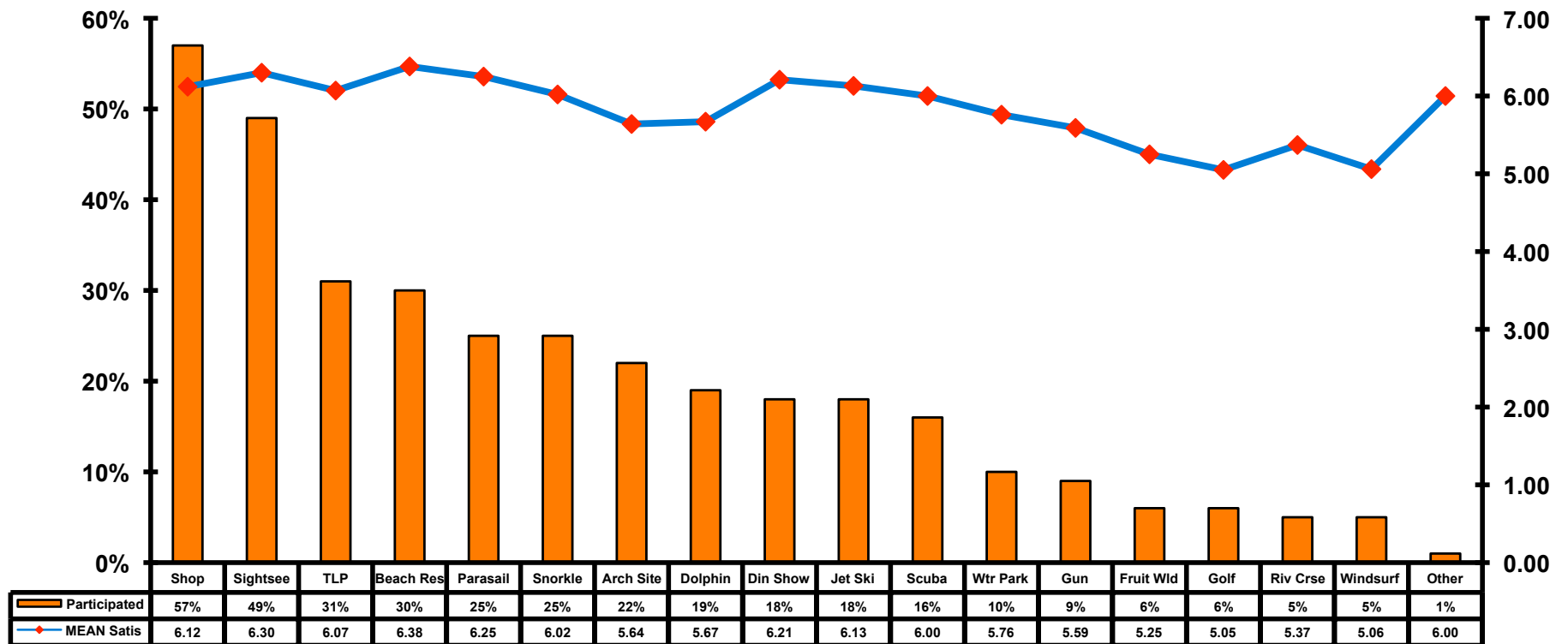
Night Tours Satisfaction

7pt Rating Scale

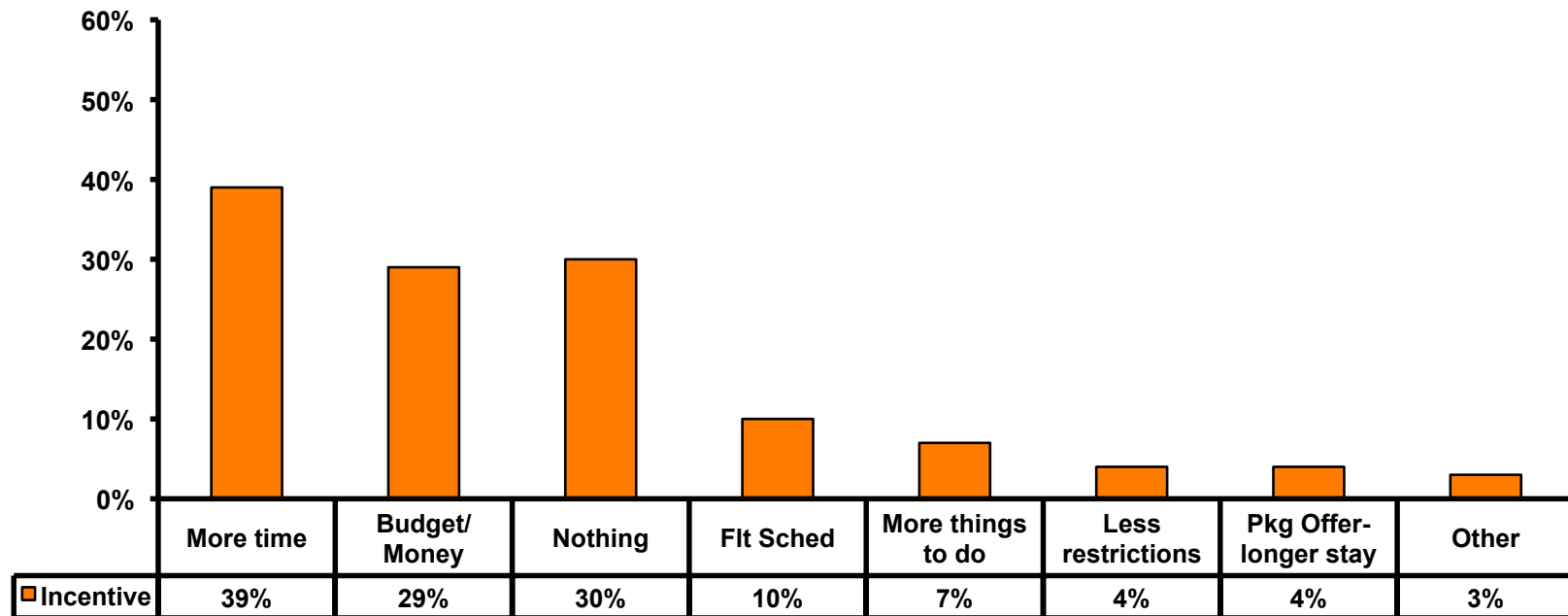
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 41%	Score of 6 to 7 = 41%
Score of 4 to 5 = 59%	Score of 4 to 5 = 57%
Score 1 to 3 = 0%	Score 1 to 3 = 2%
MEAN = 5.11	MEAN = 5.11

Satisfaction with Other Activities



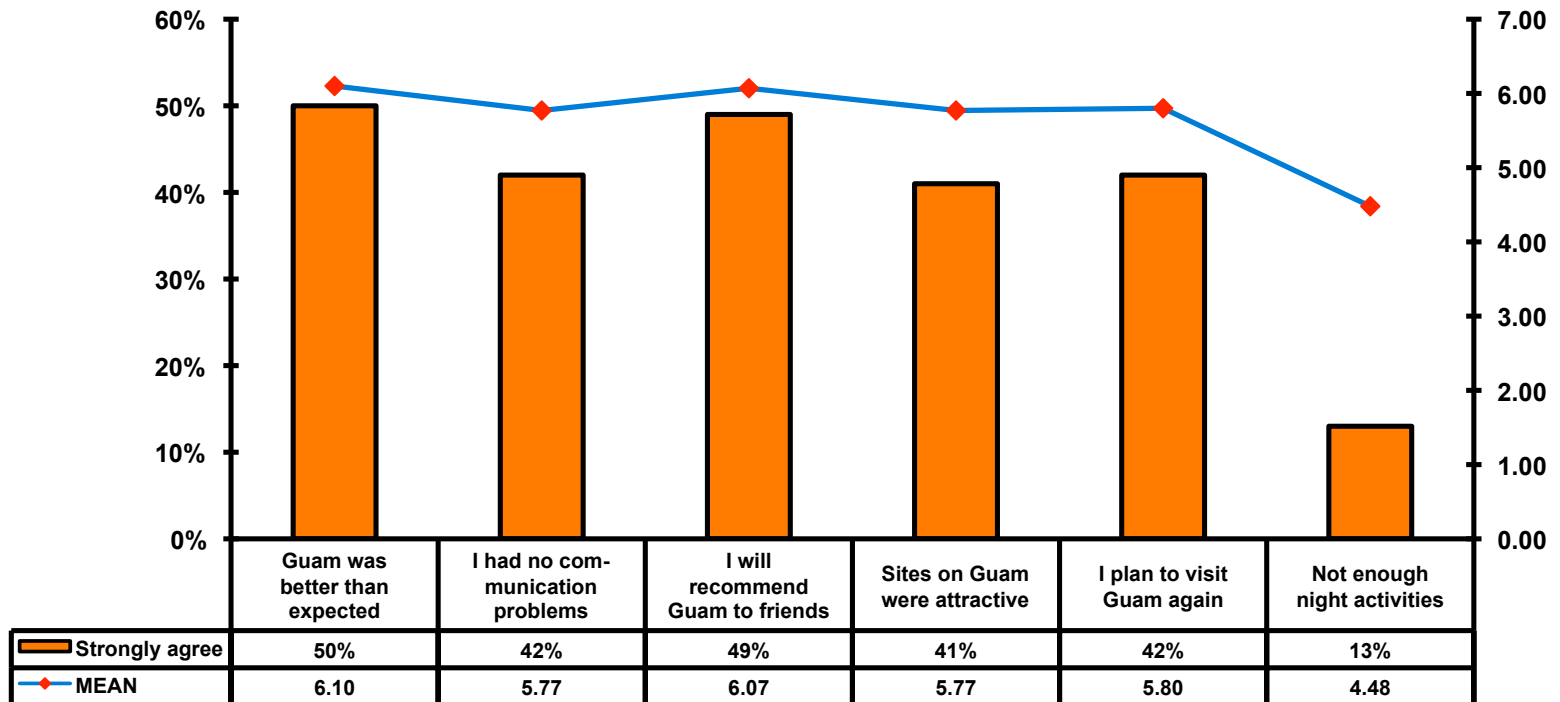
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

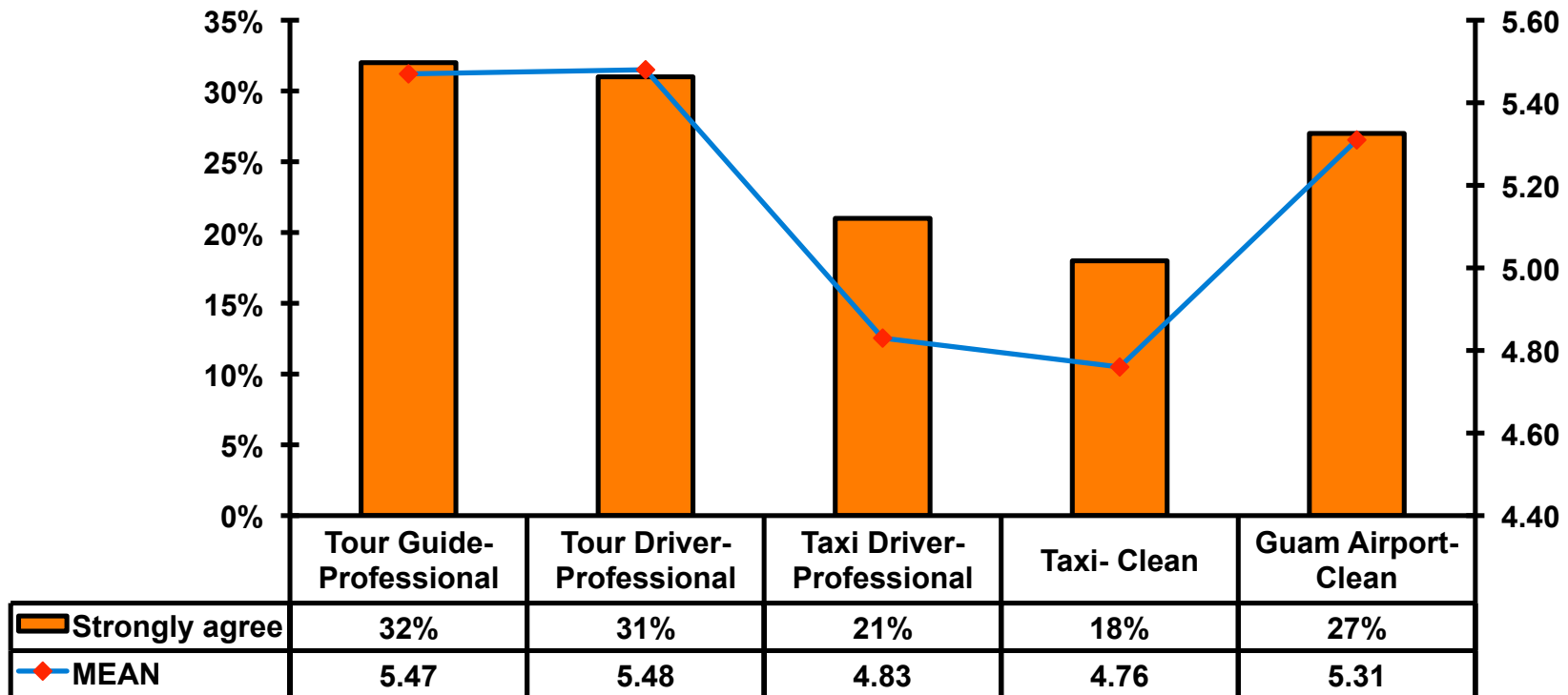
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

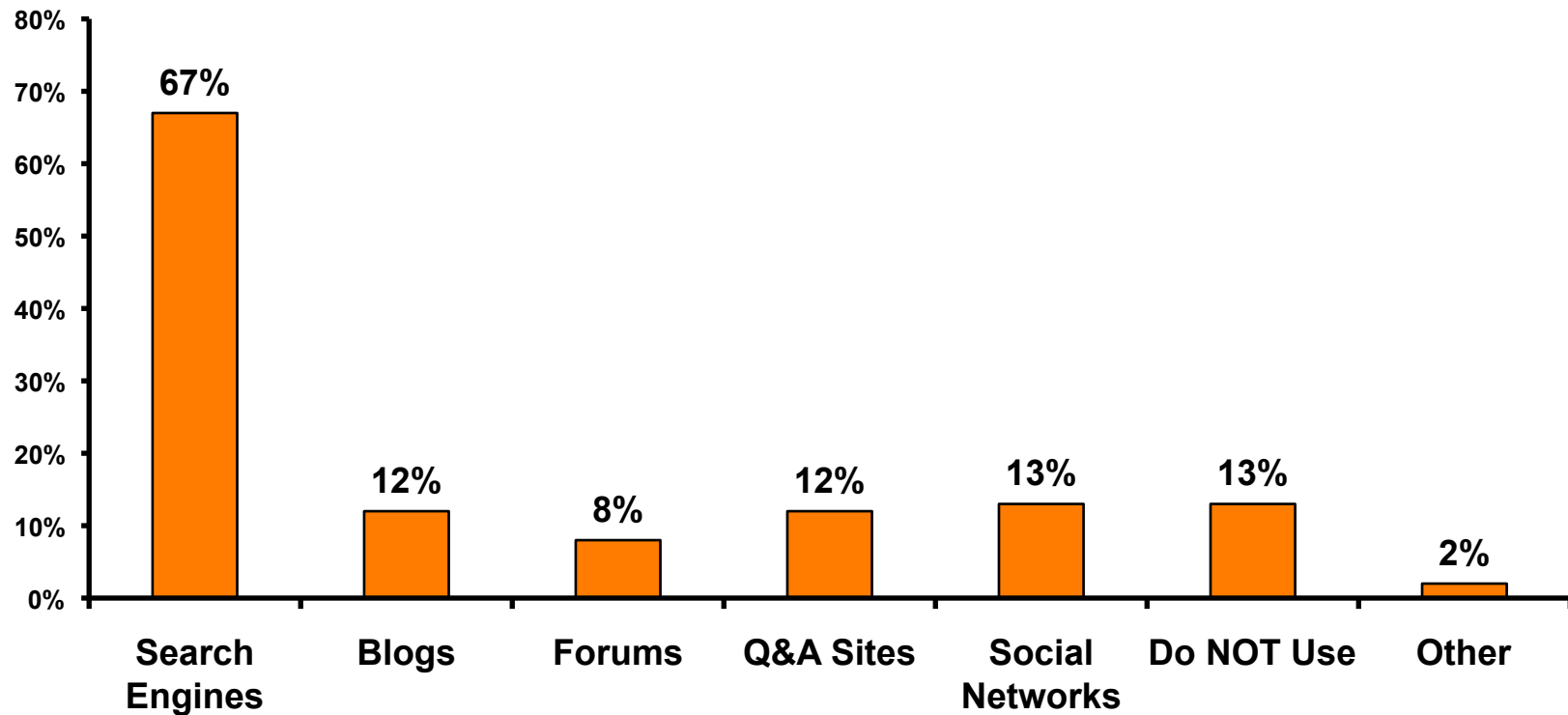
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



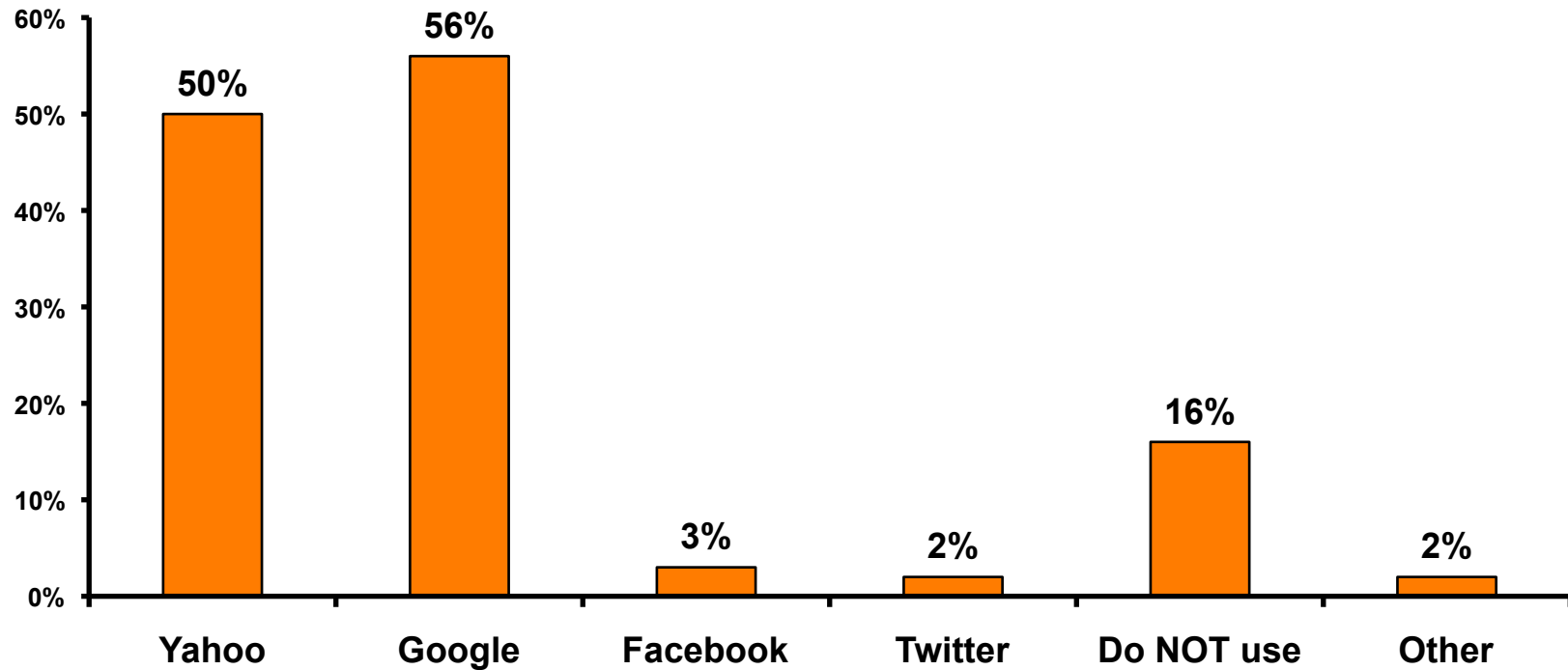
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

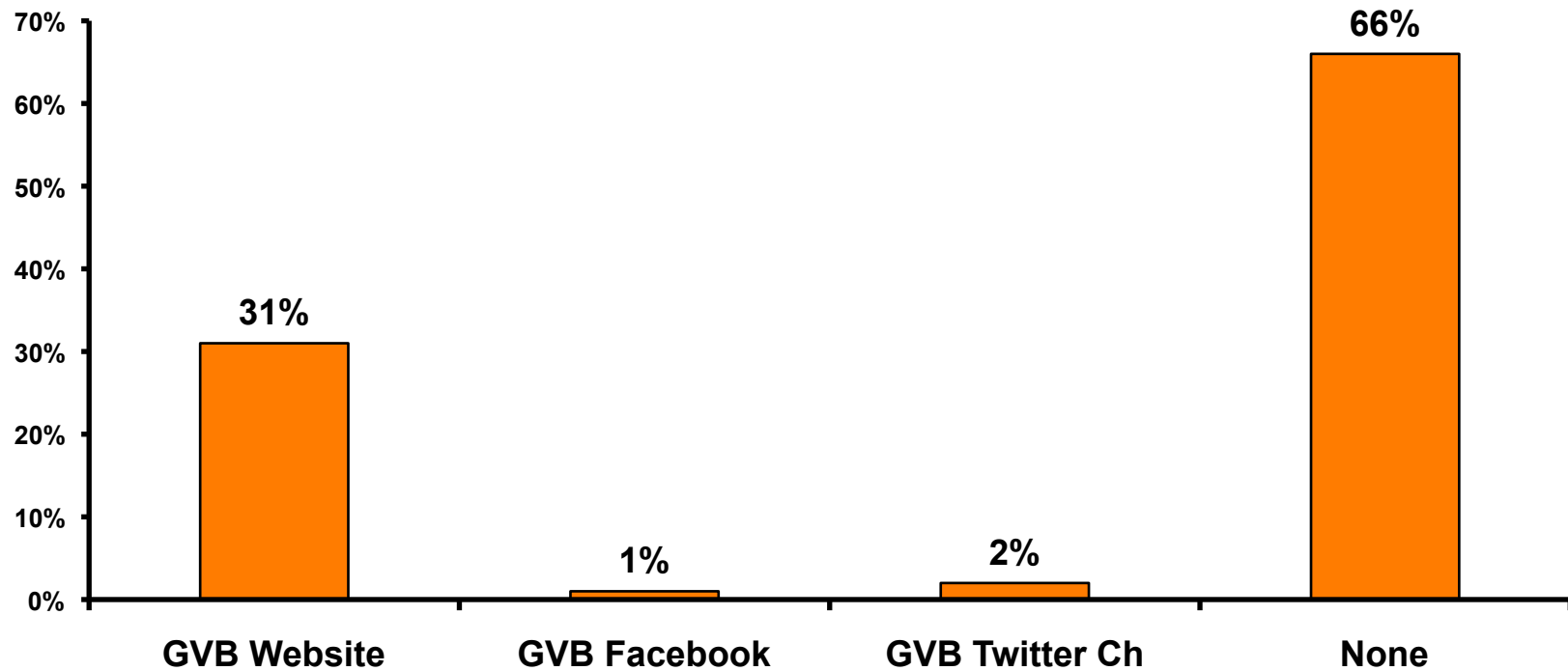


Internet- Things To Do

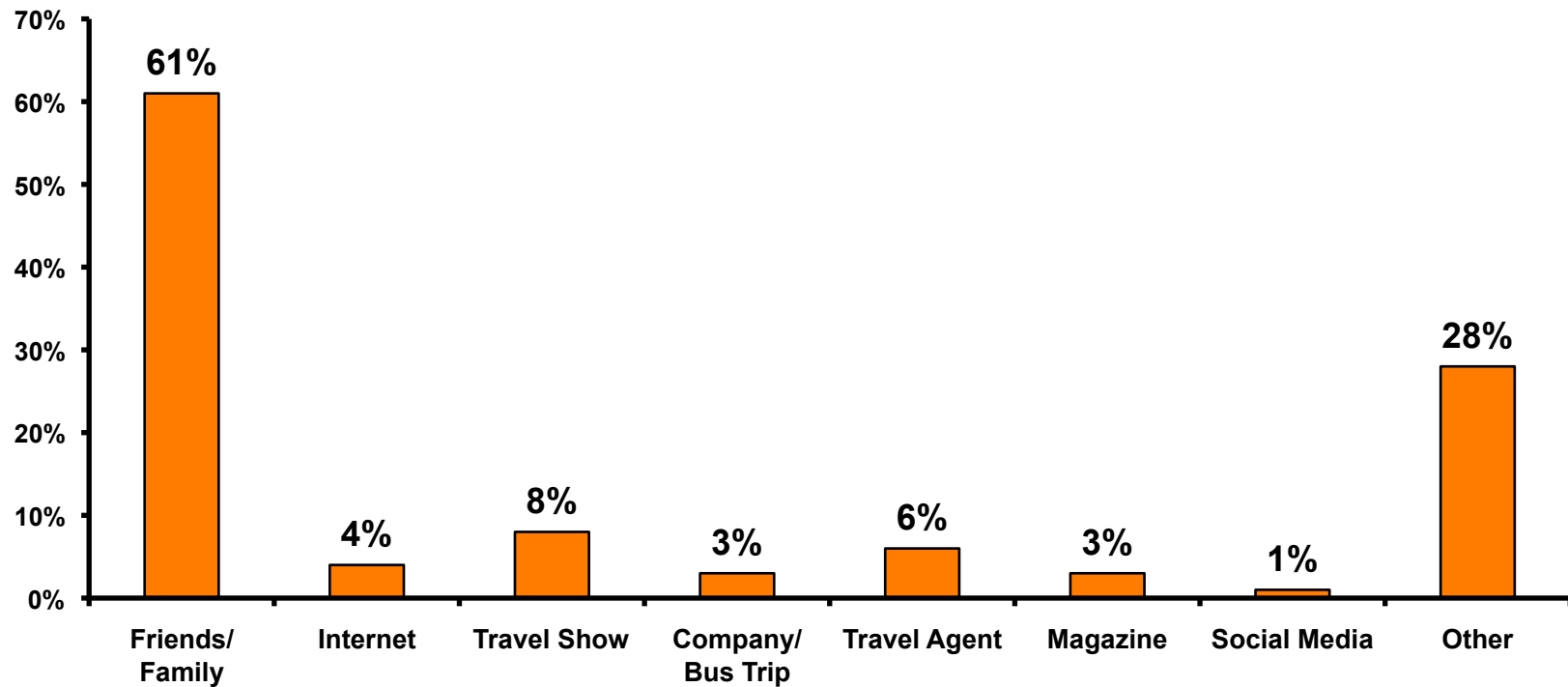
Sources of Info



Internet- GVB Sources

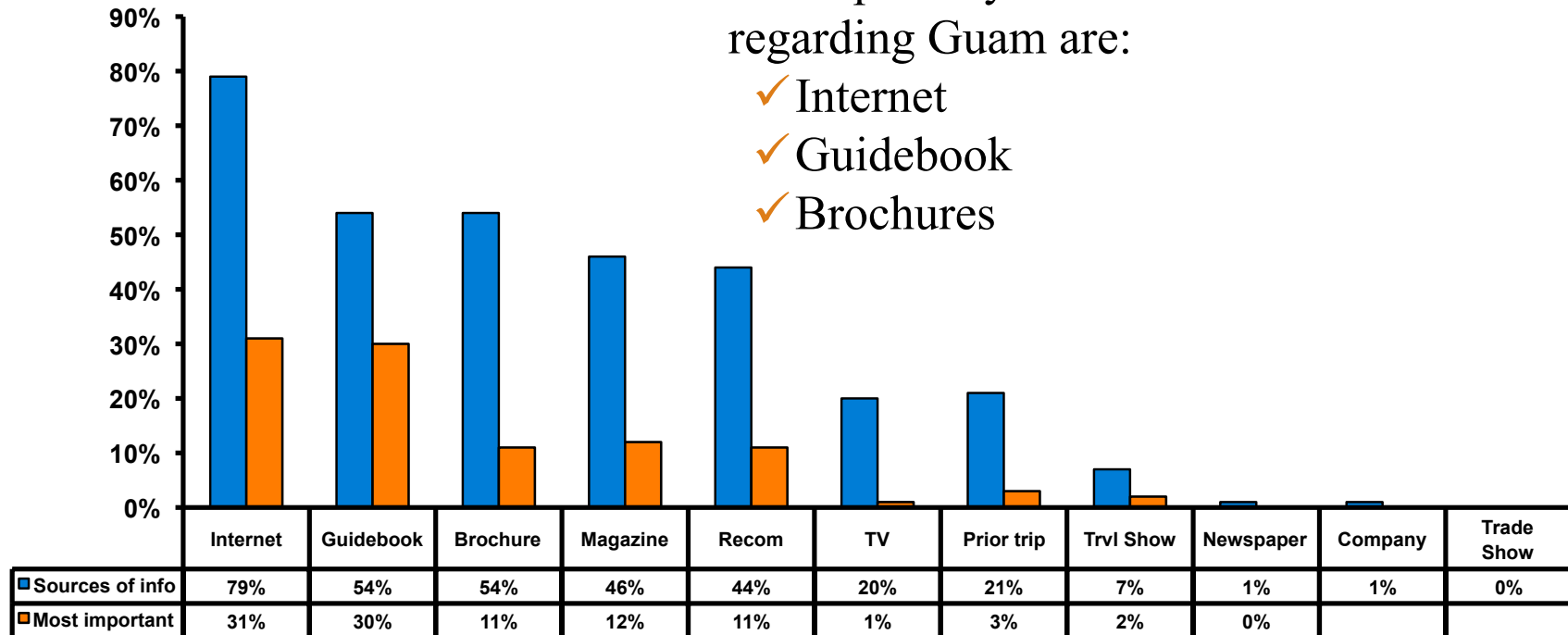


Travel Motivation- Info Sources



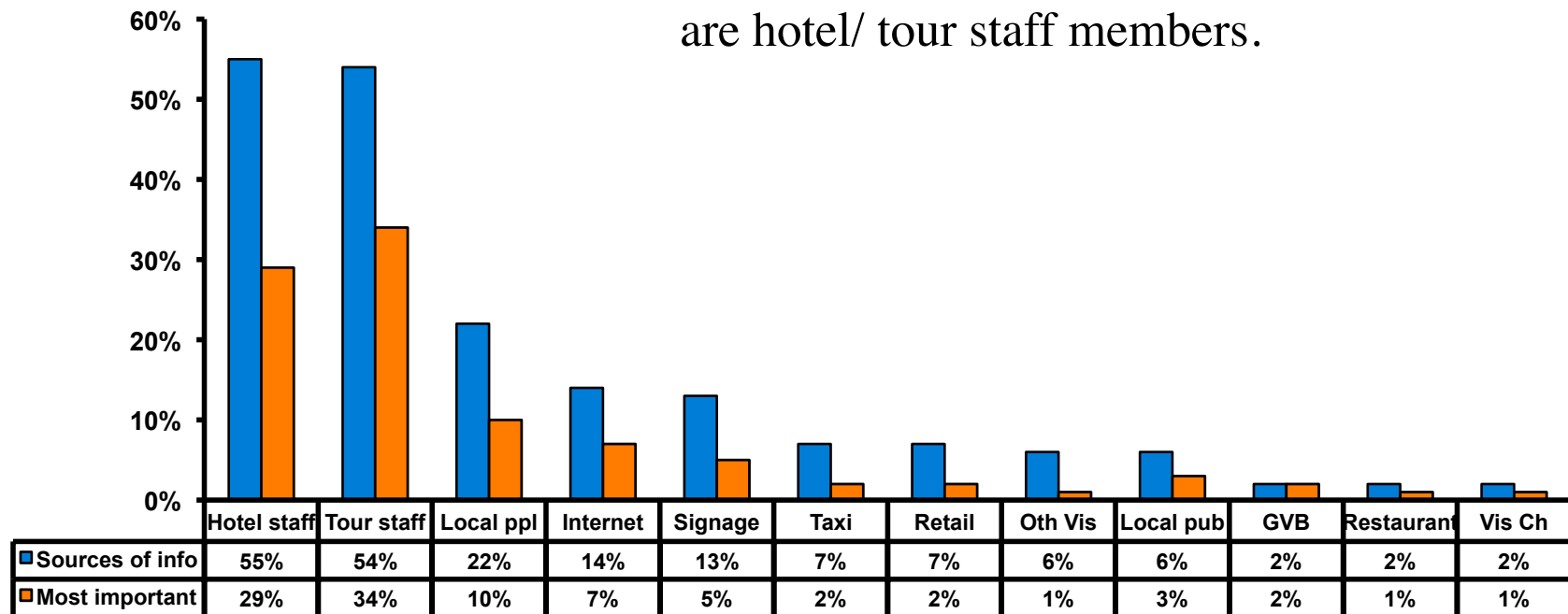
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

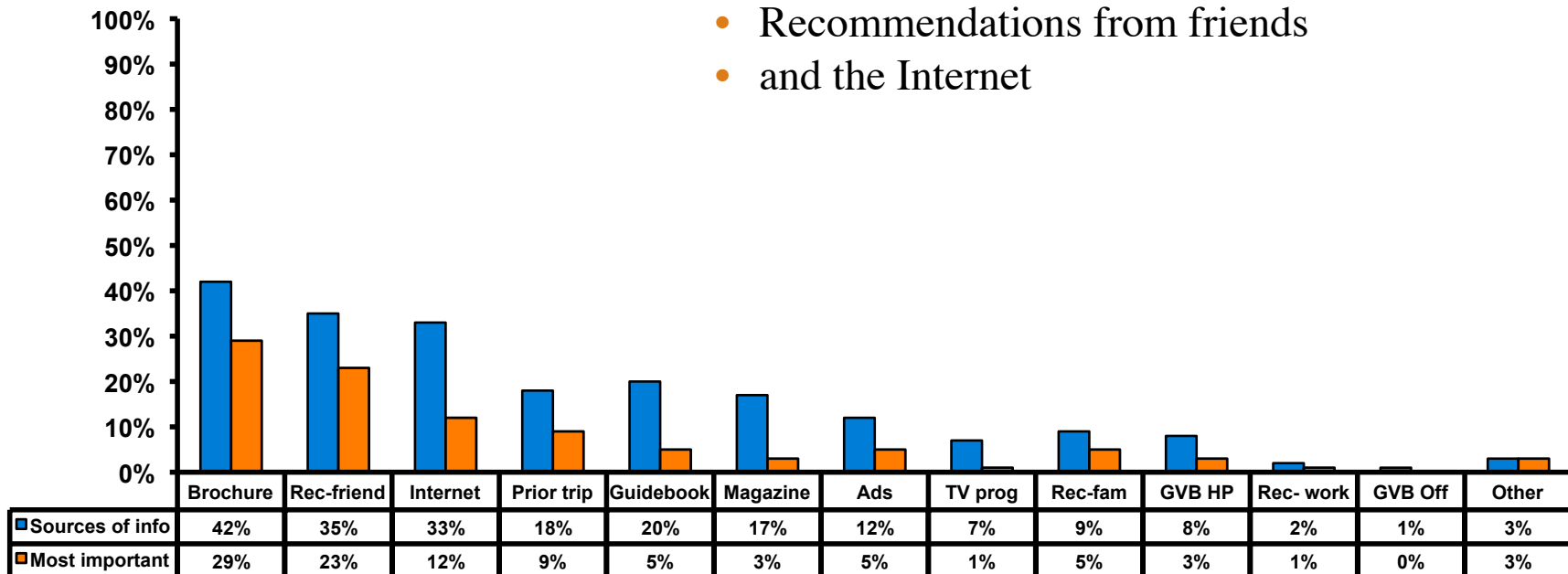
- The primary local source of information are hotel/ tour staff members.



Sources of Information - Motivation

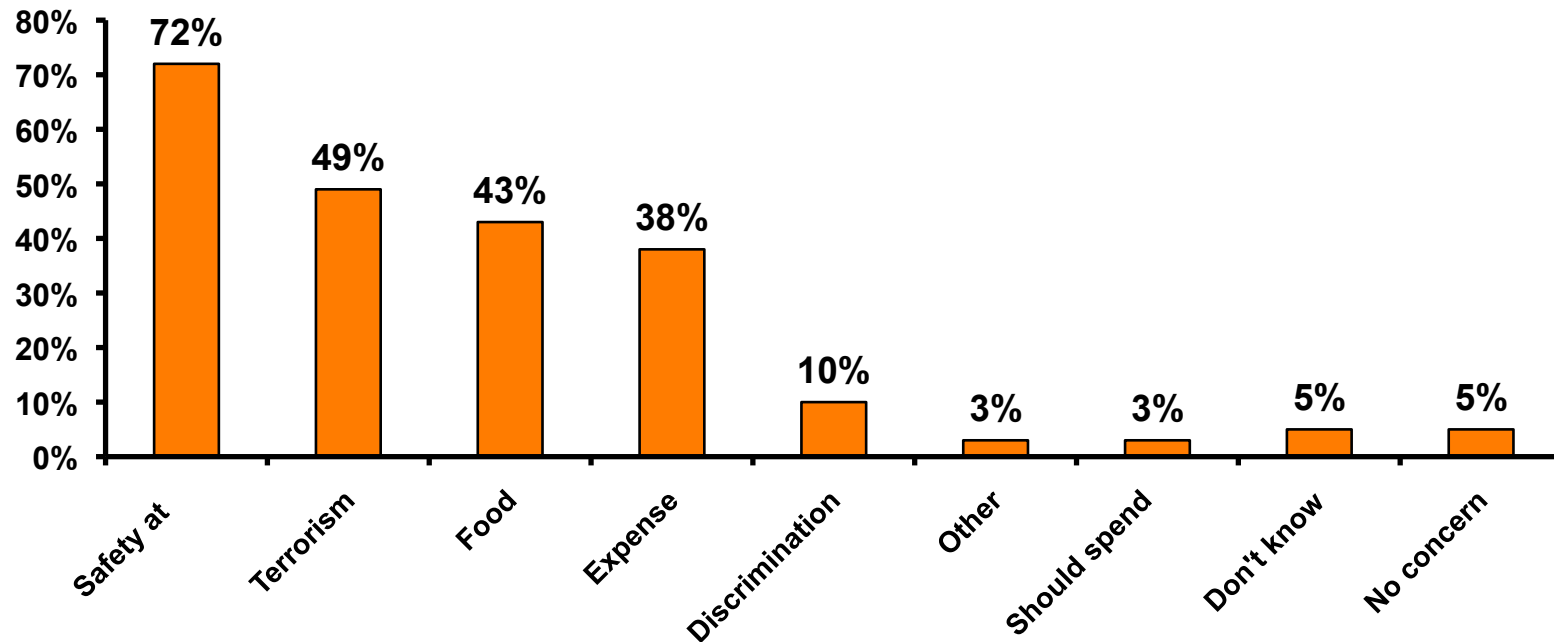
The primary motivational sources of information were:

- Brochures,
- Recommendations from friends
- and the Internet



SECTION 6 **OTHER ISSUES**

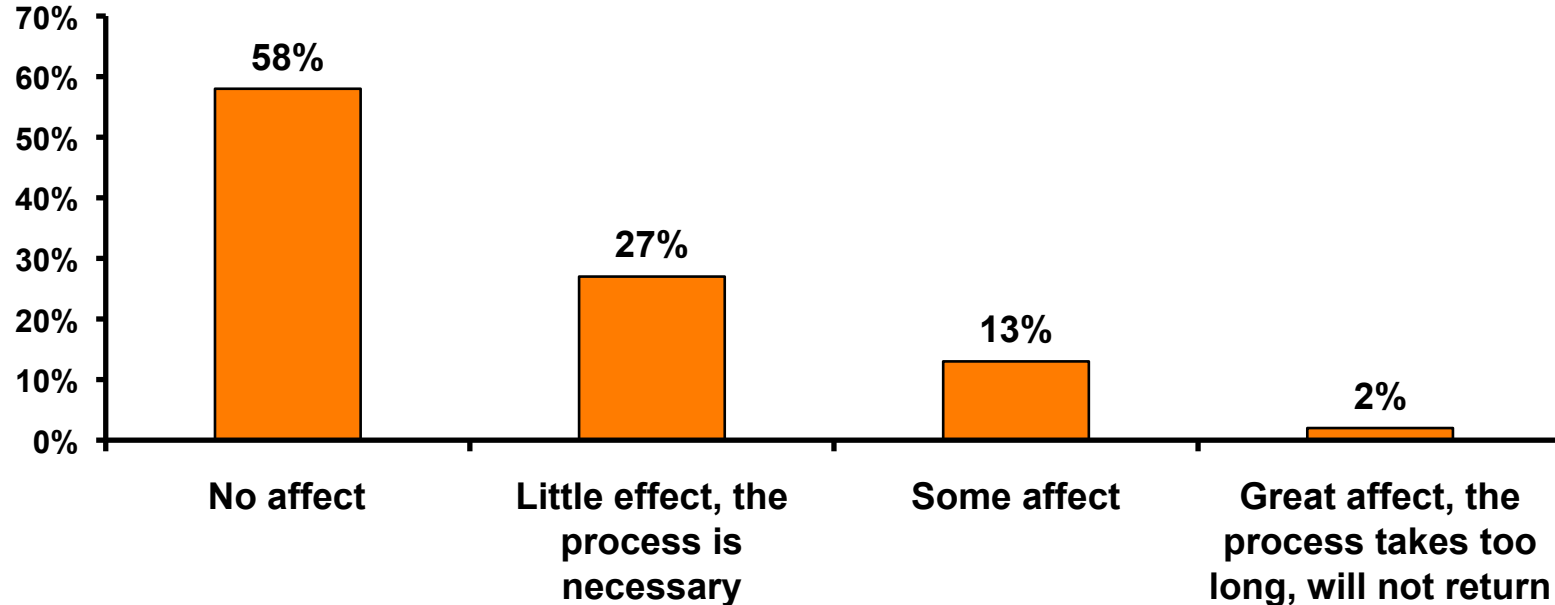
Concerns about travel outside of Japan - Overall



Concerns about travel outside of Japan - By Age & Income

		TOTAL	AGE				Q26								
		-	18-24	25-34	35-49	50+	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q21	Safety	72%	73%	62%	88%	53%	77%	69%	88%	86%	76%	79%	62%	81%	
	Terrorism	49%	49%	47%	50%	59%	40%	44%	63%	57%	41%	47%	62%	65%	
	Food	43%	41%	42%	47%	53%	51%	56%	44%	61%	31%	40%	41%	58%	
	Expense	38%	39%	36%	38%	24%	49%	56%	25%	54%	33%	38%	38%	35%	
	Discrimination against Japanese	10%	8%	16%	18%	12%	11%	13%	19%	21%	4%	6%	13%	16%	
	Don't know	5%	4%	7%	3%	6%					4%	2%	3%	3%	
	No concerns	5%	5%	7%		6%		6%		4%	10%	4%	8%		
	Other	3%	4%	2%	6%				6%		4%	11%	3%	3%	
	Should spend at home	3%	3%		3%	6%	3%			11%		4%		6%	
	Total	Count	353	255	45	34	17	35	16	16	28	51	53	39	31

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

