



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2014

NOVEMBER 2013



Prepared by: QMark Research

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Background & Methodology

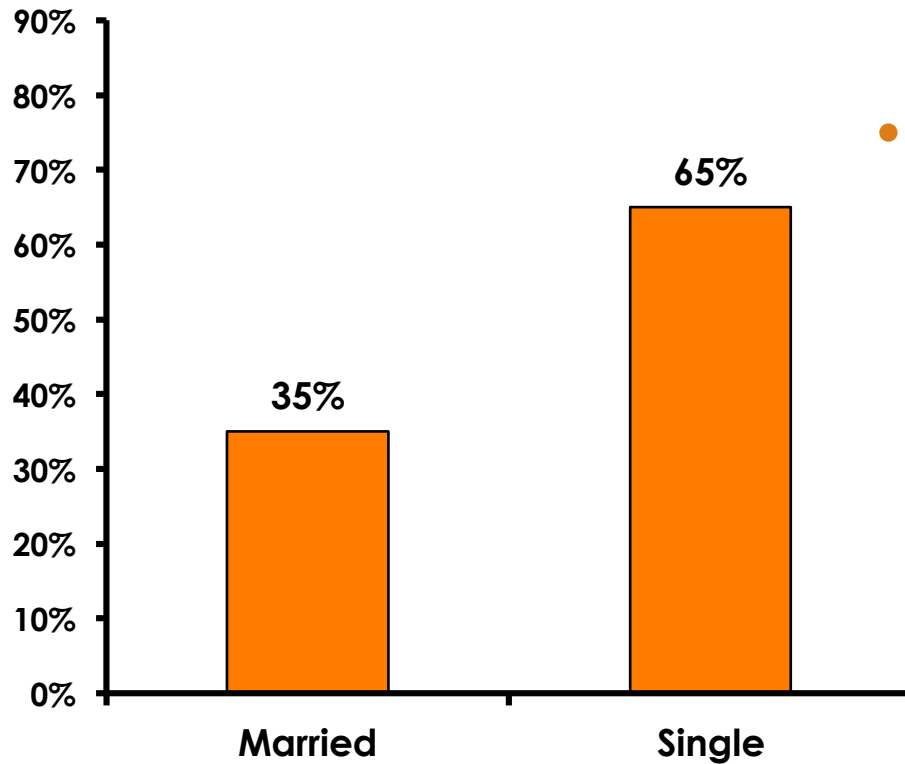
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **350** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **350** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.23 percentage points.

Objectives

- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

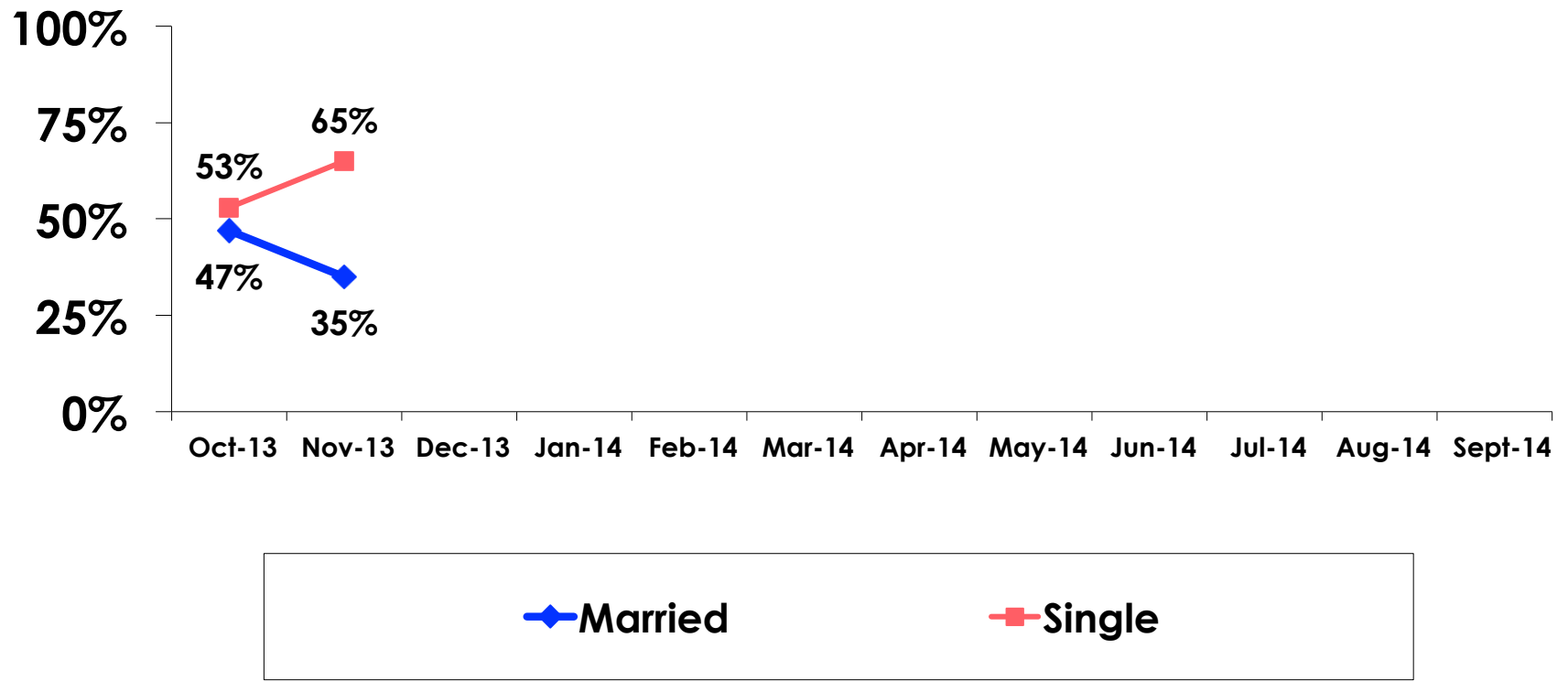
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

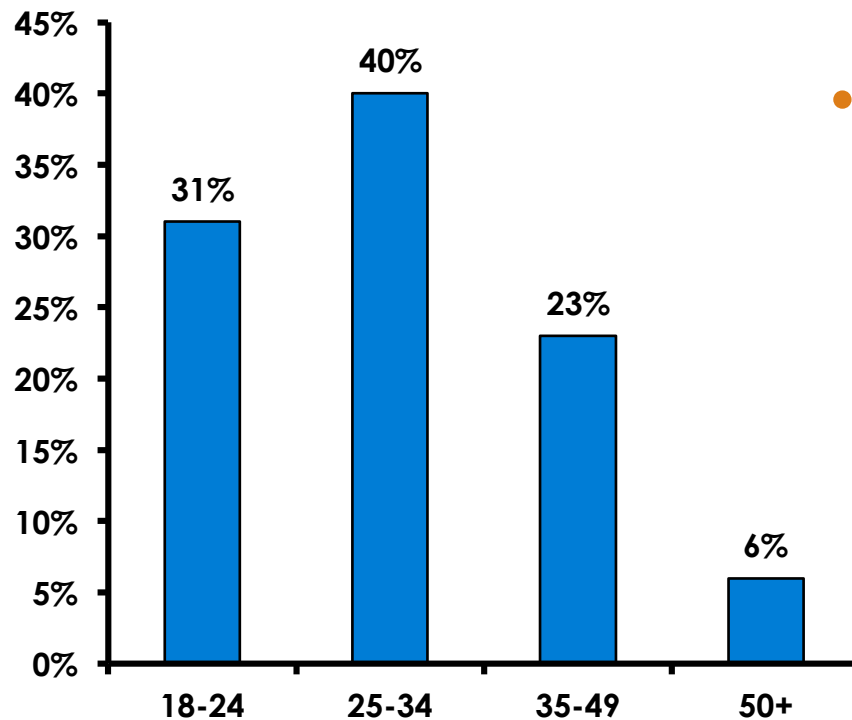


- Majority of visitors are single.

Marital Status

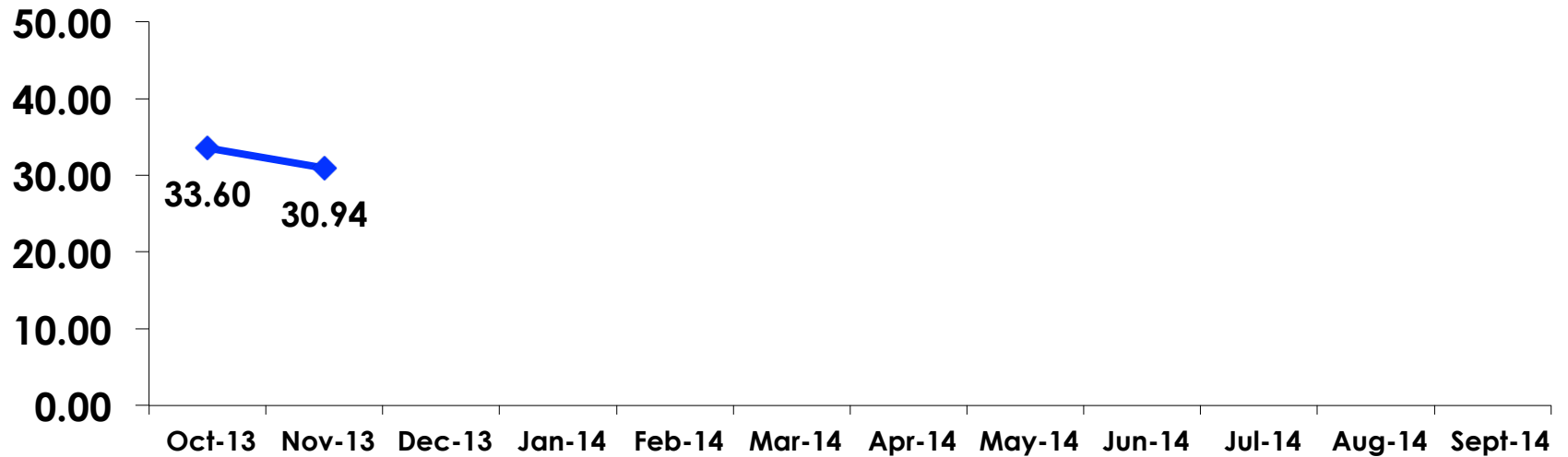


Age - Overall

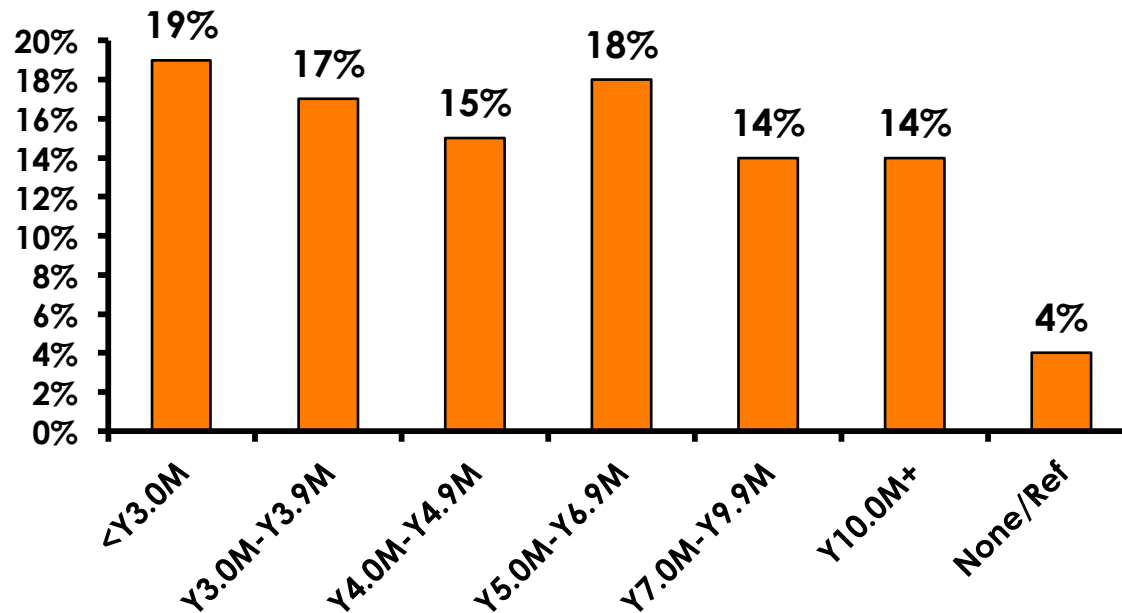


- The average age of the respondents is 30.94 years of age.

Average Age

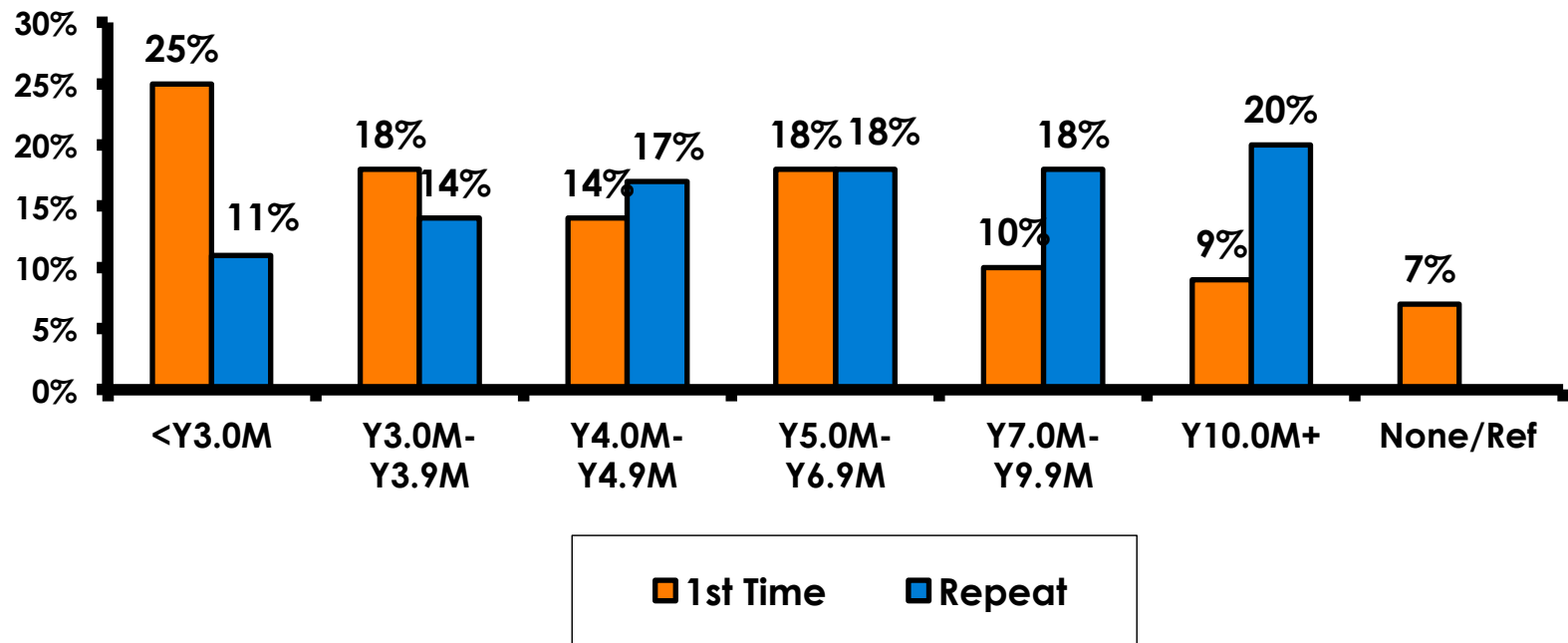


Personal Income



• ¥100.36=\$1

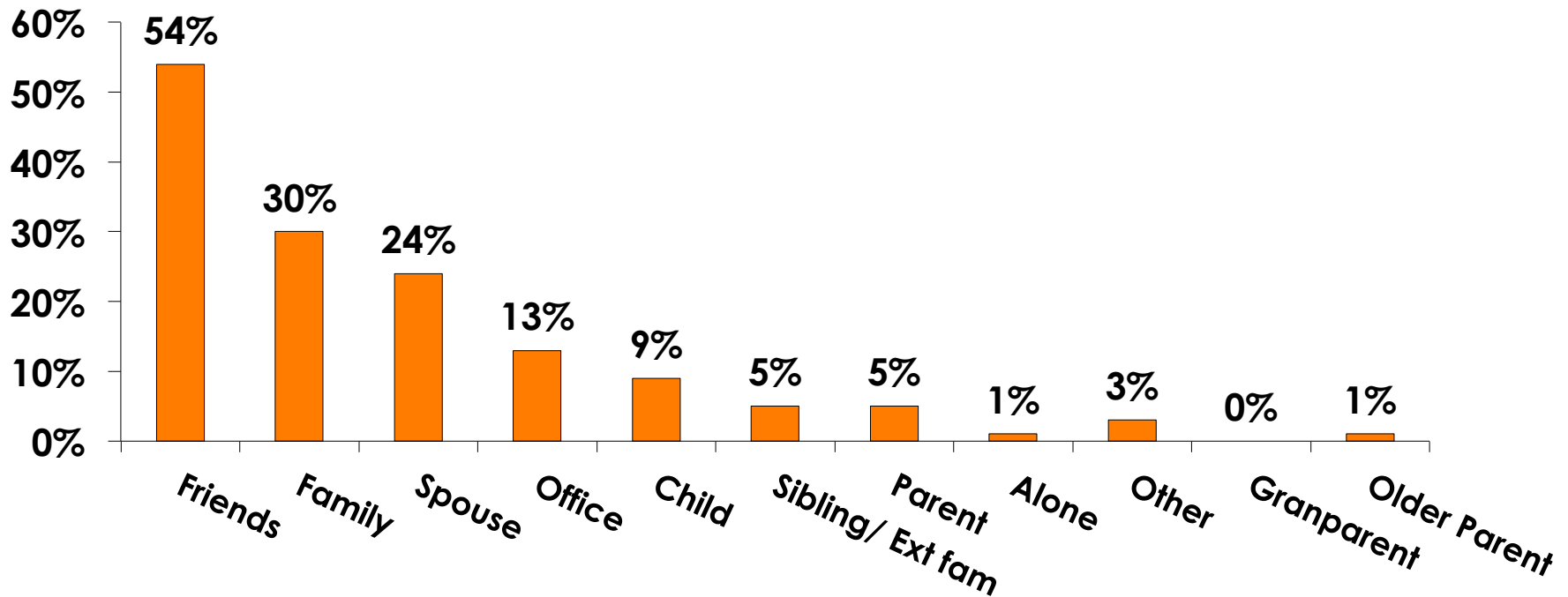
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	19	5	14	15	2	2	
		Column N %	6%	3%	10%	18%	2%	3%	
	Y2.0M-Y3.0M	Count	41	11	30	15	21	4	1
		Column N %	13%	7%	20%	18%	16%	6%	5%
	Y3.0M-Y4.0M	Count	51	27	24	12	28	8	3
		Column N %	17%	17%	16%	14%	22%	11%	14%
	Y4.0M-Y5.0M	Count	47	24	23	6	27	13	1
		Column N %	15%	15%	16%	7%	21%	18%	5%
	Y5.0M-Y7.0M	Count	55	34	21	10	25	16	3
		Column N %	18%	21%	14%	12%	19%	23%	14%
	Y7.0M-Y10.0M	Count	42	27	15	6	16	14	6
		Column N %	14%	17%	10%	7%	12%	20%	29%
	Y10.0M+	Count	42	26	16	11	10	14	7
		Column N %	14%	16%	11%	13%	8%	20%	33%
	No Income	Count	12	8	4	10	1		
		Column N %	4%	5%	3%	12%	1%		
	Total	Count	309	162	147	85	130	71	21

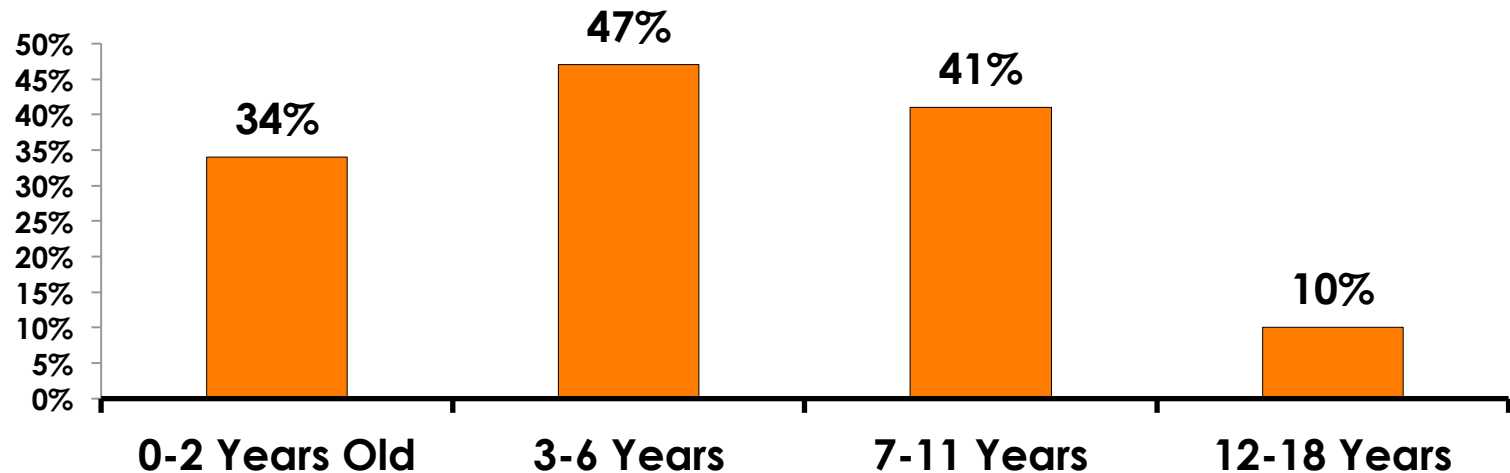
Travel Companions



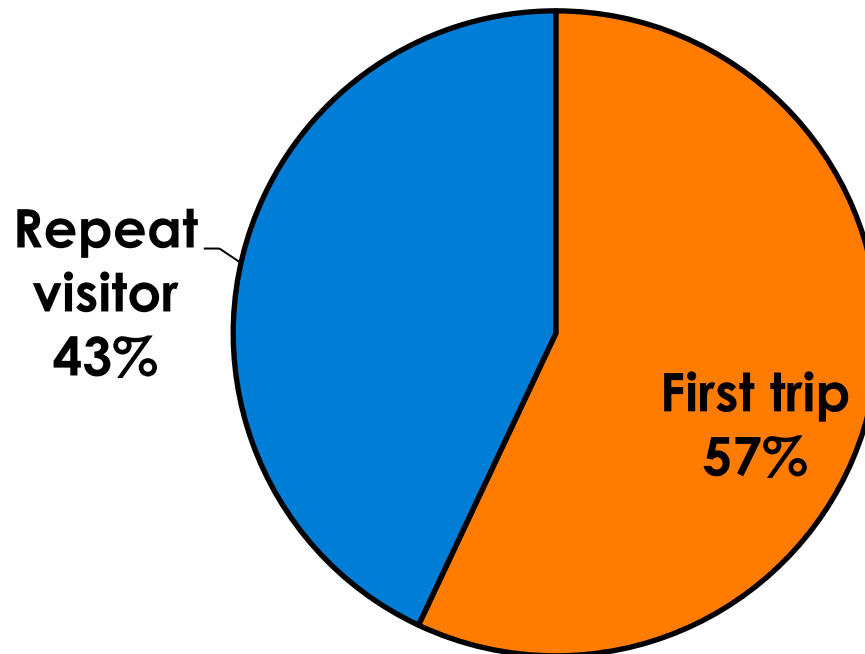
Number of Children Travel Party

N=32 total respondents traveling with children.

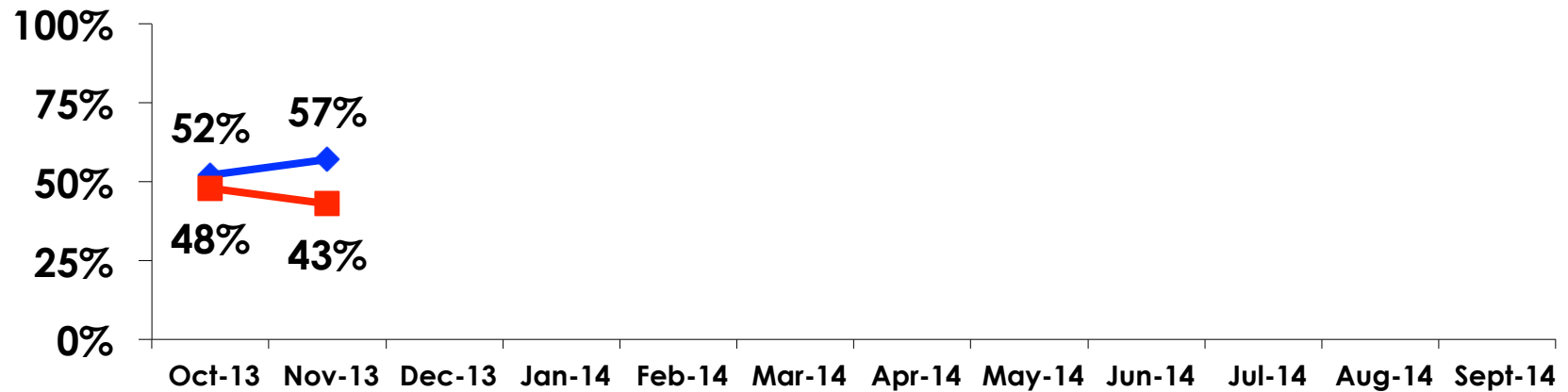
(Of those N=32 respondents, there is a total of 47 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



◆ 1st Time

■ Repeat

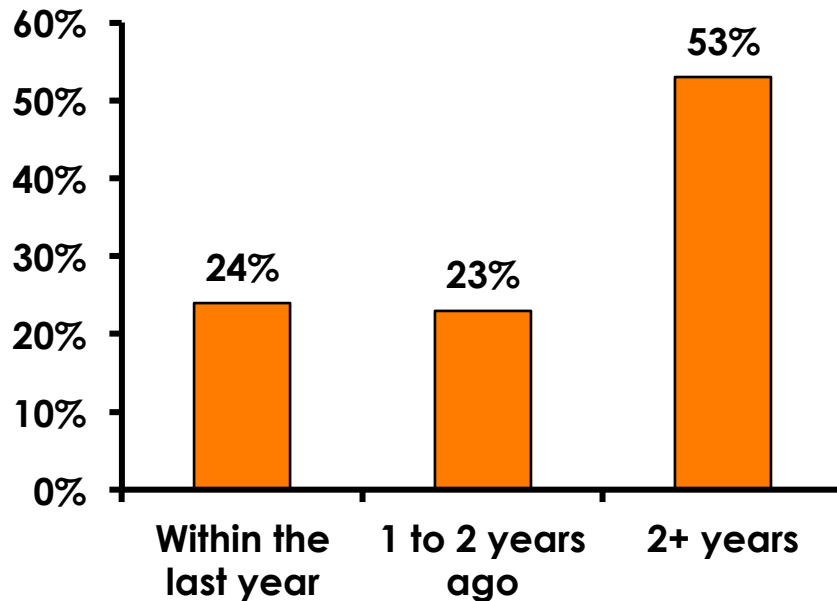
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	177	95	82	
		Column N %	51%	48%	55%	
	Female	Count	173	105	67	
		Column N %	49%	53%	45%	
	Total	Count	350	200	149	
AGE	18-24	Count	106	78	28	
		Column N %	31%	39%	19%	
	25-34	Count	140	82	57	
		Column N %	40%	41%	39%	
	35-49	Count	79	33	46	
		Column N %	23%	17%	31%	
	50+	Count	22	6	16	
		Column N %	6%	3%	11%	
		Total	Count	347	199	147

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

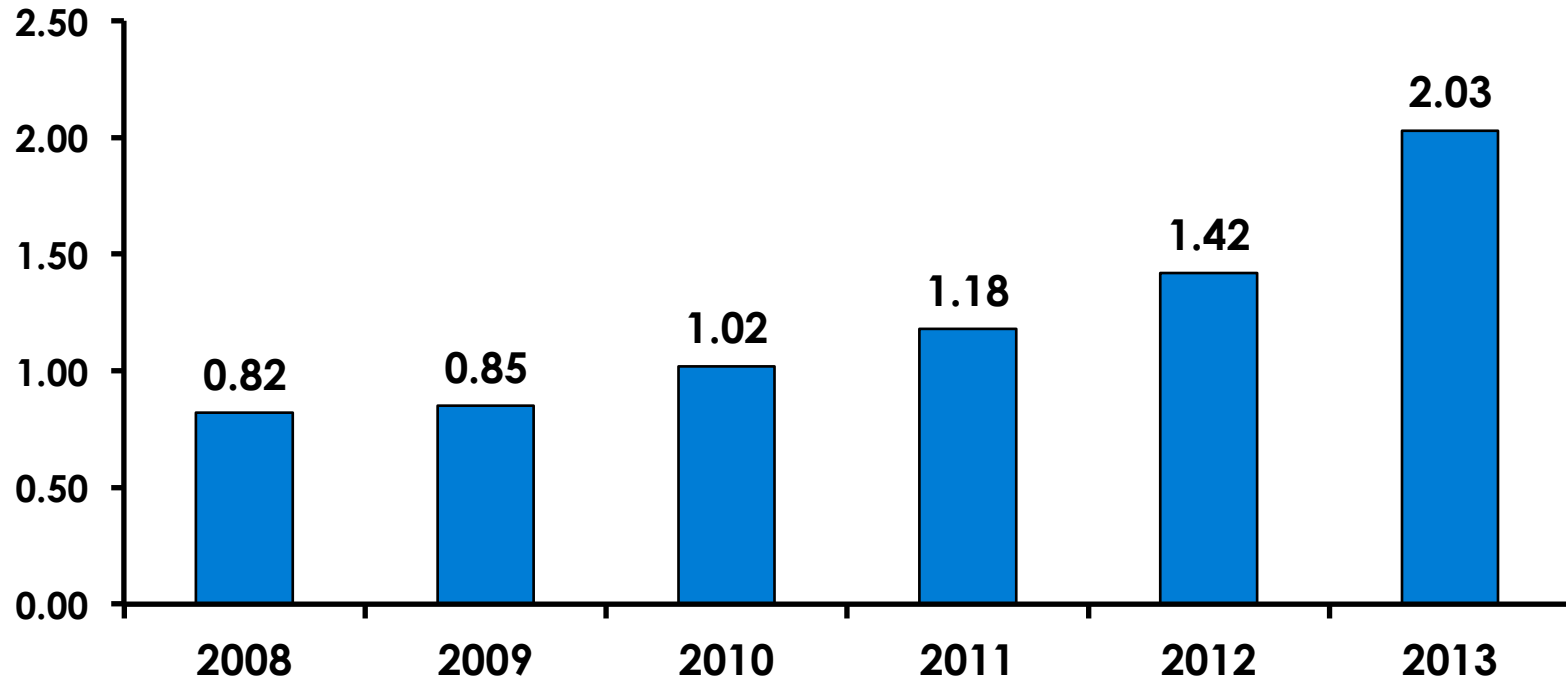
Repeat Visitors Last Trip

n = 147



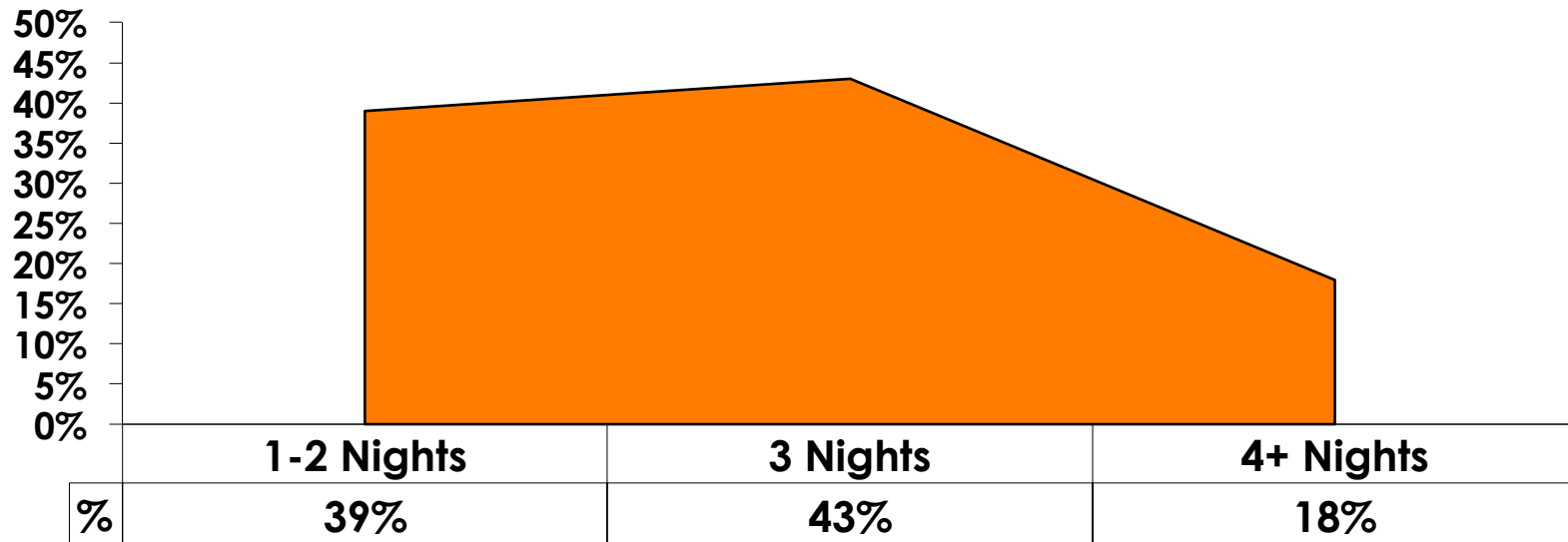
- The average repeat visitor has been to Guam 2.51 times.
- Half of the repeat visitors have been to Guam within the last 2 years.

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

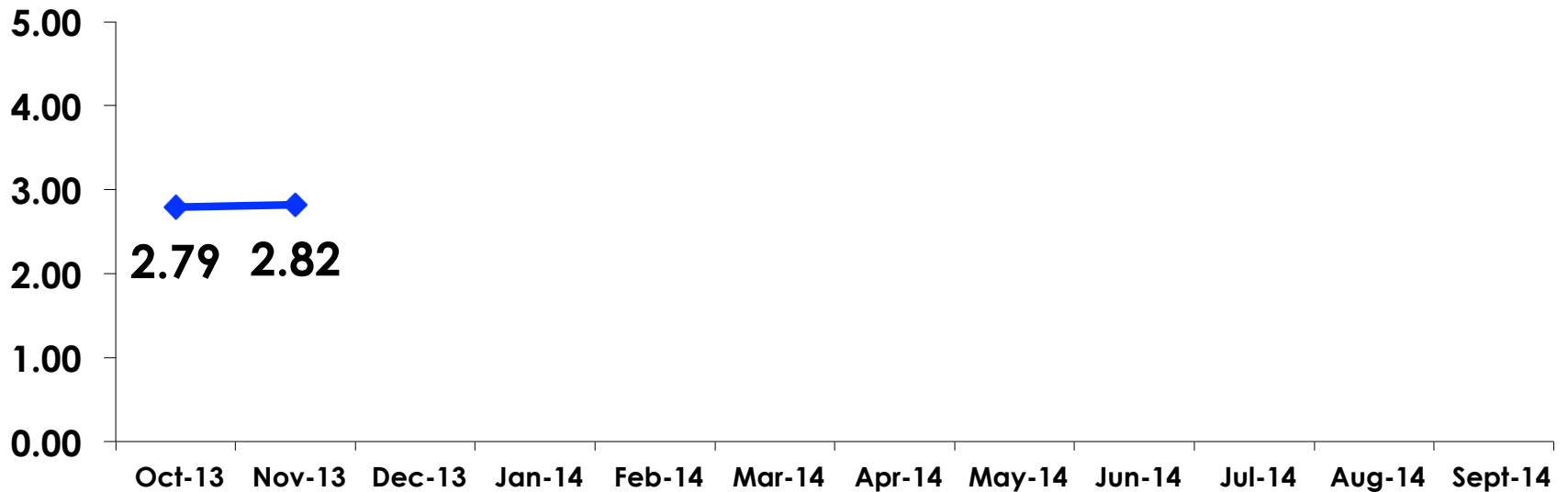


Length of Stay

Mean = 2.82 Days
Median = 3.0 Days



Average Length of Stay

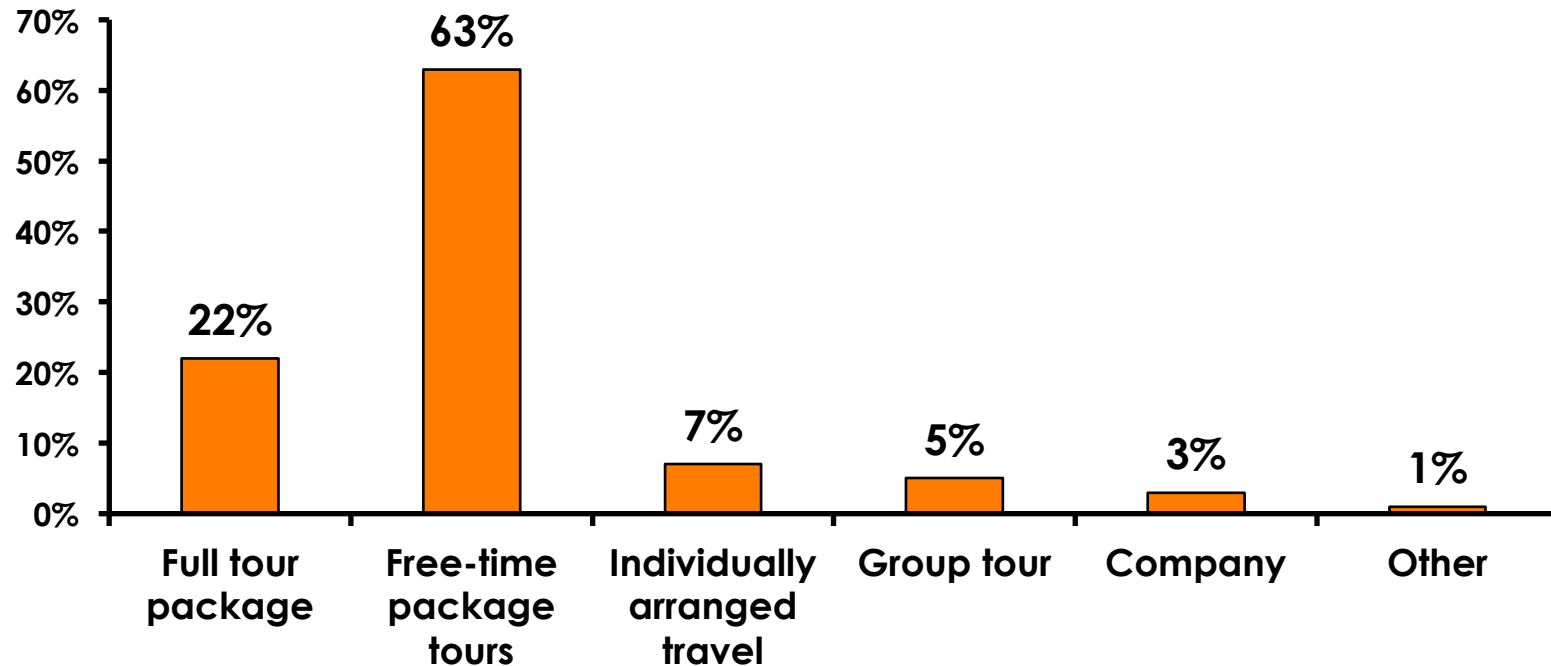


Occupation by Income

		TOTAL	Q26								
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q25	Office worker non-mgr	18%	6%	27%	27%	13%	18%	24%	14%		
	Engineer	16%	6%	17%	25%	20%	15%	24%	2%		
	Student	15%	50%	7%	6%	9%	7%	10%	17%	67%	
	Salesperson	12%		7%	14%	13%	24%	12%	10%		
	Self-employed	6%		10%	2%	9%	2%	7%	12%		
	Manager	5%			2%	9%	7%	12%	7%		
	Skilled worker	4%			4%	7%	9%	5%	2%		
	Other	4%	11%	7%	4%	7%	2%		2%		
	Govt- office worker non-mgr	3%		7%	4%	2%	4%		5%		
	Professional/ Specialist	3%		5%		4%	2%		10%		
	Homemaker	2%		2%		2%	5%			17%	
	Freeter	2%	11%		2%		2%	5%			
	Unemployed	2%	11%	2%	4%				2%	8%	
	Teacher	2%		5%		4%	2%		2%		
	Executive (30+ employees)	2%		2%	2%				12%		
	Govt- Executive	1%	6%			2%	2%				
	Retired	1%			2%			2%			
	Free-lancer	1%			2%					8%	
	Govt- Manager	0%							2%		
	Total	Count	336	18	41	51	46	55	42	42	12

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

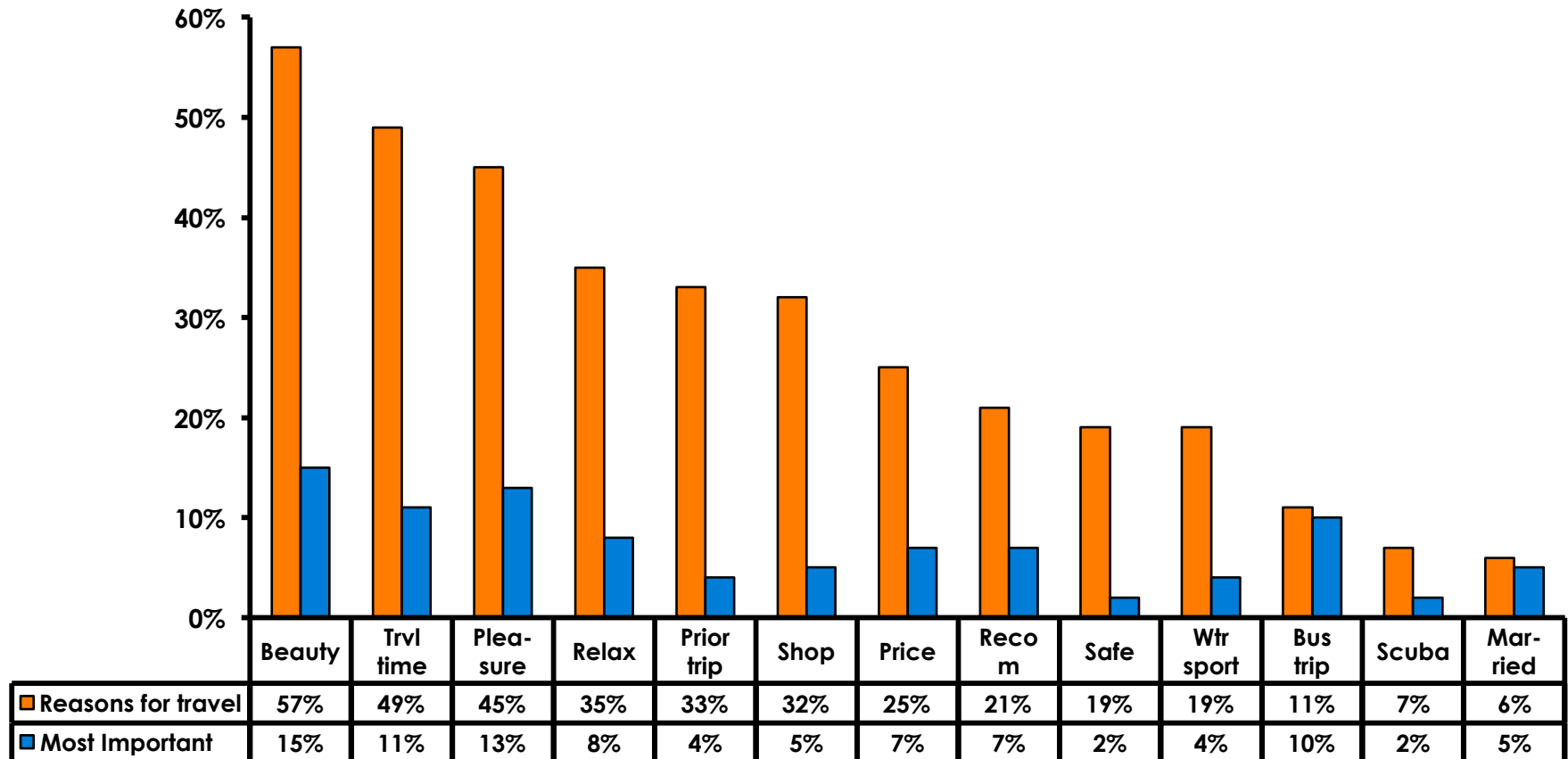


Accommodation by Income

Average length of stay: 2.82 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%	17%	29%	23%	29%	14%	10%	8%	
Guam Reef & Olive Spa	13%	11%	39%	16%	13%	4%	14%	5%		
Pacific Bay Hotel	7%		10%	4%	4%	2%	5%	12%	8%	
Onward Beach Resort	6%	16%	7%	4%	2%	4%	14%	5%	8%	
Grand Plaza Hotel	5%	5%	2%	6%	4%	5%		14%		
Fiesta Resort Guam	5%	5%		10%	2%	7%	7%	2%		
Outrigger Guam Resort	5%		2%	8%	6%	4%	5%	5%		
Hyatt Regency Guam	5%	5%	2%		9%	5%	5%	2%		
Holiday Resort Guam	4%			4%	4%	4%	5%	2%	25%	
Oceanview Hotel	4%	5%	5%		9%	4%		7%	8%	
Hilton Guam Resort	3%	5%		2%	4%	5%	7%	5%		
PIC Club	3%			4%	4%	2%	10%	5%		
Westin Resort Guam	3%			6%		5%		5%		
Sheraton Laguna Guam	3%		2%	2%	4%		5%	7%		
Hotel Nikko Guam	3%	5%			2%	4%	5%	5%		
Royal Orchid Guam	2%		5%		2%	7%	2%			
Hotel Santa Fe	2%	5%	2%		4%				8%	
Guam Marriott Resort	2%					7%			8%	
Other	1%	5%		2%					17%	
Bayview Hotel	1%		2%	4%		2%	2%			
Leo Palace Resort	1%	5%			2%			2%		
Condo	1%							5%	8%	
Tumon Bay Capital Hotel	1%		2%							
Home stay/ friend/ relative	0%							2%		
Total	Count	349	19	41	51	47	55	42	42	12

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure and
- 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	57%	53%	63%	57%	41%	51%	63%	
	Short travel time	49%	38%	54%	52%	55%	49%	49%	
	Pleasure	45%	51%	46%	42%	27%	39%	52%	
	Relax	35%	32%	36%	38%	27%	29%	40%	
	Previous trip	33%	21%	33%	43%	59%	35%	32%	
	Shopping	32%	35%	37%	25%	14%	23%	42%	
	Price	25%	23%	26%	23%	23%	26%	23%	
	Recomm- friend/family/trvl agnt	21%	35%	16%	16%	9%	14%	29%	
	Safe	19%	19%	19%	19%	14%	20%	17%	
	Water sports	19%	23%	18%	14%	23%	18%	20%	
	Company/ Business Trip	11%	14%	7%	11%	27%	12%	10%	
	Scuba	7%	7%	6%	6%	9%	9%	4%	
	Married/ Attn wedding	6%	2%	9%	6%	5%	9%	3%	
	Other	4%	4%	5%	4%		6%	2%	
	Honeymoon	3%	1%	4%	3%		5%		
	Golf	2%		2%	3%	14%	5%		
	Visit friends/ Relatives	2%	3%	1%	4%	5%	2%	2%	
	Organized sports	1%		2%	1%	5%	2%	1%	
	Company Sponsored	0%		1%				1%	
	Total	Count	350	106	140	79	22	177	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	57%	53%	59%	59%	53%	58%	62%	62%	33%	
	Short travel time	49%	32%	46%	43%	47%	71%	55%	50%	25%	
	Pleasure	45%	47%	46%	51%	36%	47%	50%	48%	25%	
	Relax	35%	42%	32%	37%	32%	36%	40%	45%		
	Previous trip	33%	21%	22%	24%	38%	35%	52%	55%		
	Shopping	32%	37%	29%	37%	30%	42%	33%	24%	42%	
	Price	25%	16%	17%	22%	26%	33%	29%	24%	42%	
	Recomm- friend/family/trvl agnt	21%	42%	27%	20%	17%	15%	12%	24%	17%	
	Safe	19%	16%	17%	14%	26%	20%	19%	21%	33%	
	Water sports	19%	37%	15%	27%	11%	16%	17%	19%	25%	
	Company/ Business Trip	11%	16%	12%	6%	13%	7%	14%	10%	33%	
	Scuba	7%	16%	2%	6%	9%	5%	7%	10%		
	Married/ Attn wedding	6%		2%	10%	9%	11%	5%		8%	
	Other	4%		7%	8%	2%	5%		2%		
	Honeymoon	3%			6%	2%	5%	5%			
	Golf	2%		2%				10%	7%		
	Visit friends/ Relatives	2%	11%		2%		4%				
	Organized sports	1%				2%	5%	2%			
	Company Sponsored	0%				2%					
	Total	Count	350	19	41	51	47	55	42	42	12

SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥100.36/US\$1

- \$1,170.97 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$21,921 = maximum (highest amount recorded for the entire sample)
- \$686.70 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



YTD=\$683.21

Breakdown of Prepaid Expenditures

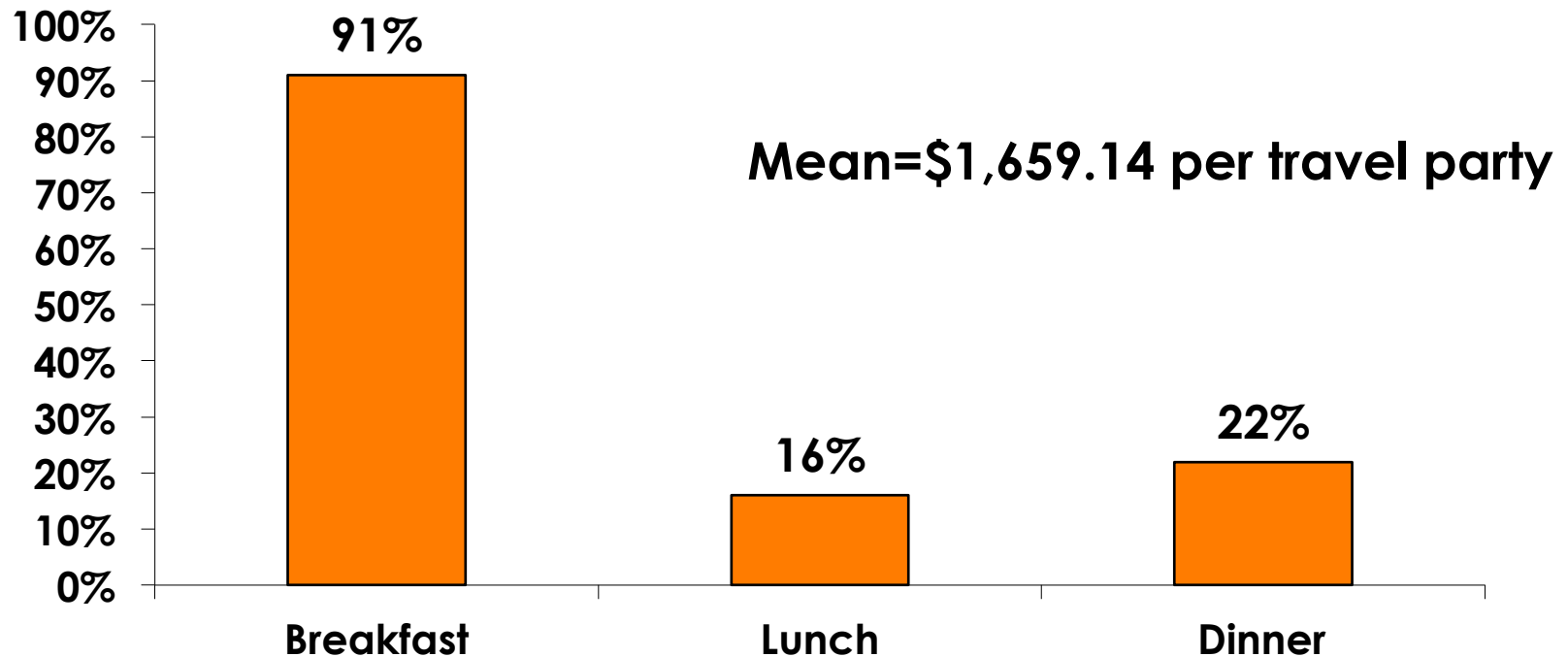
¥100.36=\$1

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

	MEAN \$
Air & Accommodation package only	\$1,184.95
Air & Accommodation w/ daily meal package	\$1,659.14
Air only	\$1,352.99
Accommodation only	\$662.61
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$29.89
Ground transportation – Japan	\$85.74
Ground transportation – Guam	\$61.38
Optional tours/ activities	\$201.05
Other expenses	\$330.48
Total Prepaid	\$1,170.97

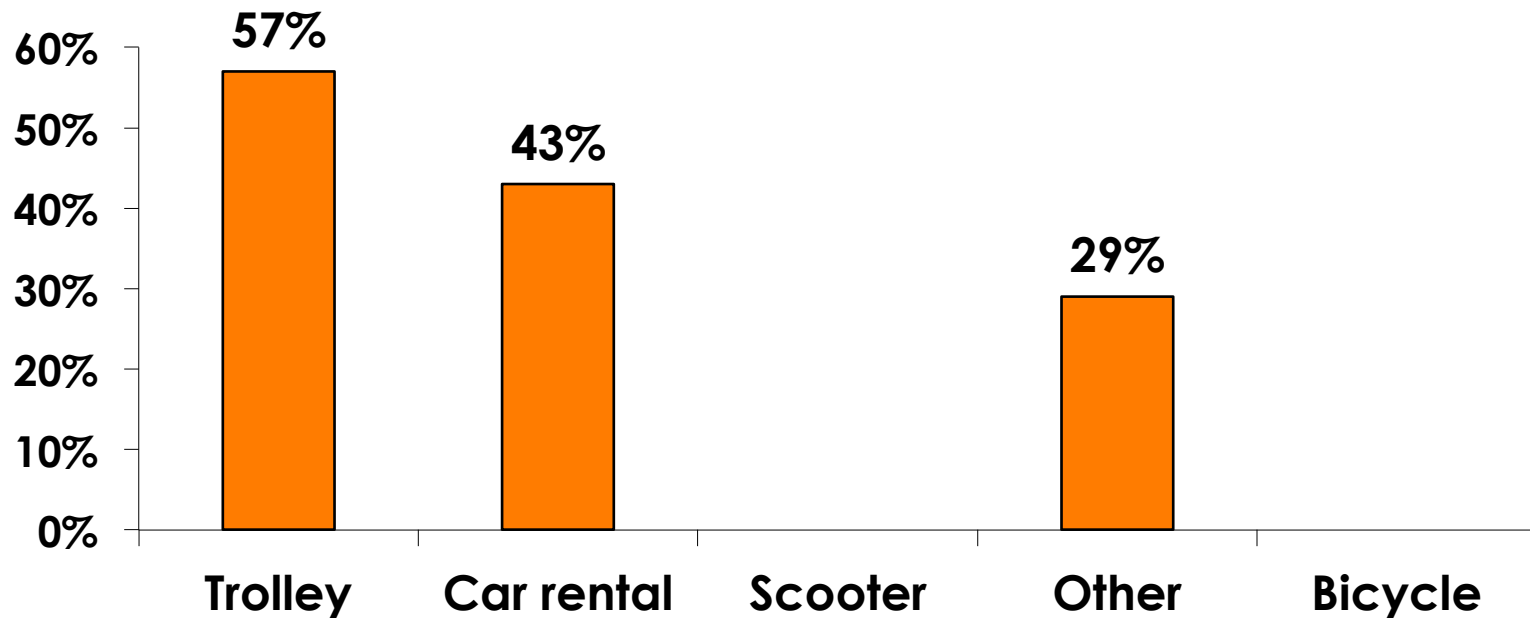
Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package
n=45



Prepaid Ground Transportation

n=7



Mean=\$61.38 per travel party

On-Island Expenditures

- \$647.47 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,000 = Maximum (highest amount recorded for the entire sample)
- \$499.47 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person Per Stay



YTD = \$500.23

Prepaid / On-Island Expenditures Per Person Per Stay

Prepaid YTD = \$683.21 On-Island YTD = \$500.23



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	\$499.47	\$446.37	\$553.81	\$383.08	\$497.97	\$394.70	\$520.98	\$463.77	\$638.99	\$613.25	\$511.40
	Median	\$380	\$333	\$450	\$300	\$363	\$342	\$300	\$400	\$500	\$486	\$511
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$295
	Maximum	\$4,000	\$4,000	\$3,000	\$1,640	\$4,000	\$1,800	\$1,500	\$2,000	\$2,456	\$3,000	\$700

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$25.55	\$36.46	\$14.39	\$11.46	\$18.71	\$43.27	\$74.55
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$28.43	\$40.02	\$16.57	\$25.94	\$28.48	\$30.84	\$30.59
	Median	\$10	\$16	\$0	\$10	\$10	\$10	\$11
F&B RESTRNT	Mean	\$67.88	\$82.56	\$52.87	\$35.06	\$76.76	\$91.20	\$79.09
	Median	\$20	\$50	\$0	\$0	\$23	\$50	\$60
OPT TOUR	Mean	\$73.48	\$102.47	\$43.81	\$36.89	\$83.66	\$79.04	\$164.64
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$74
GIFT- SELF	Mean	\$189.49	\$177.25	\$202.00	\$90.23	\$242.38	\$206.62	\$270.45
	Median	\$32	\$20	\$50	\$0	\$75	\$30	\$50
GIFT- OTHER	Mean	\$103.08	\$118.88	\$86.91	\$61.72	\$110.06	\$125.13	\$190.32
	Median	\$50	\$50	\$50	\$23	\$70	\$90	\$110
TRANS	Mean	\$13.15	\$16.23	\$9.99	\$9.03	\$16.39	\$13.52	\$7.05
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$175.34	\$181.31	\$169.24	\$202.21	\$168.25	\$172.92	\$98.64
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$674.47	\$755.28	\$591.80	\$472.65	\$744.48	\$754.22	\$915.32
	Median	\$500	\$500	\$500	\$400	\$500	\$500	\$601

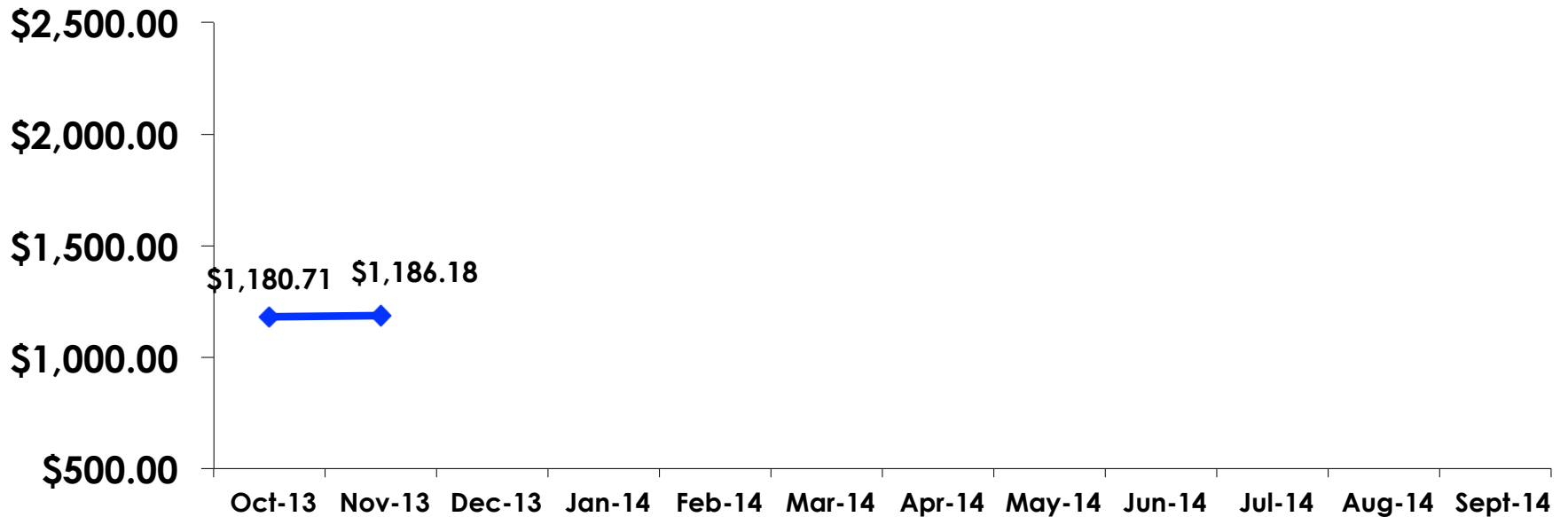
On-Island Expenditures First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$25.55	\$18.56	\$35.11
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$28.43	\$30.14	\$26.09
	Median	\$10	\$10	\$8
F&B RESTRNT	Mean	\$67.88	\$64.81	\$72.23
	Median	\$20	\$20	\$20
OPT TOUR	Mean	\$73.48	\$70.25	\$78.31
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$189.49	\$178.81	\$204.42
	Median	\$32	\$42	\$30
GIFT- OTHER	Mean	\$103.08	\$95.92	\$112.04
	Median	\$50	\$50	\$50
TRANS	Mean	\$13.15	\$12.02	\$14.76
	Median	\$0	\$0	\$0
OTHER	Mean	\$175.34	\$137.43	\$226.54
	Median	\$0	\$0	\$0
TOTAL	Mean	\$674.47	\$606.26	\$767.21
	Median	\$500	\$495	\$500

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,186.18 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,980 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person



YTD=\$1,183.44

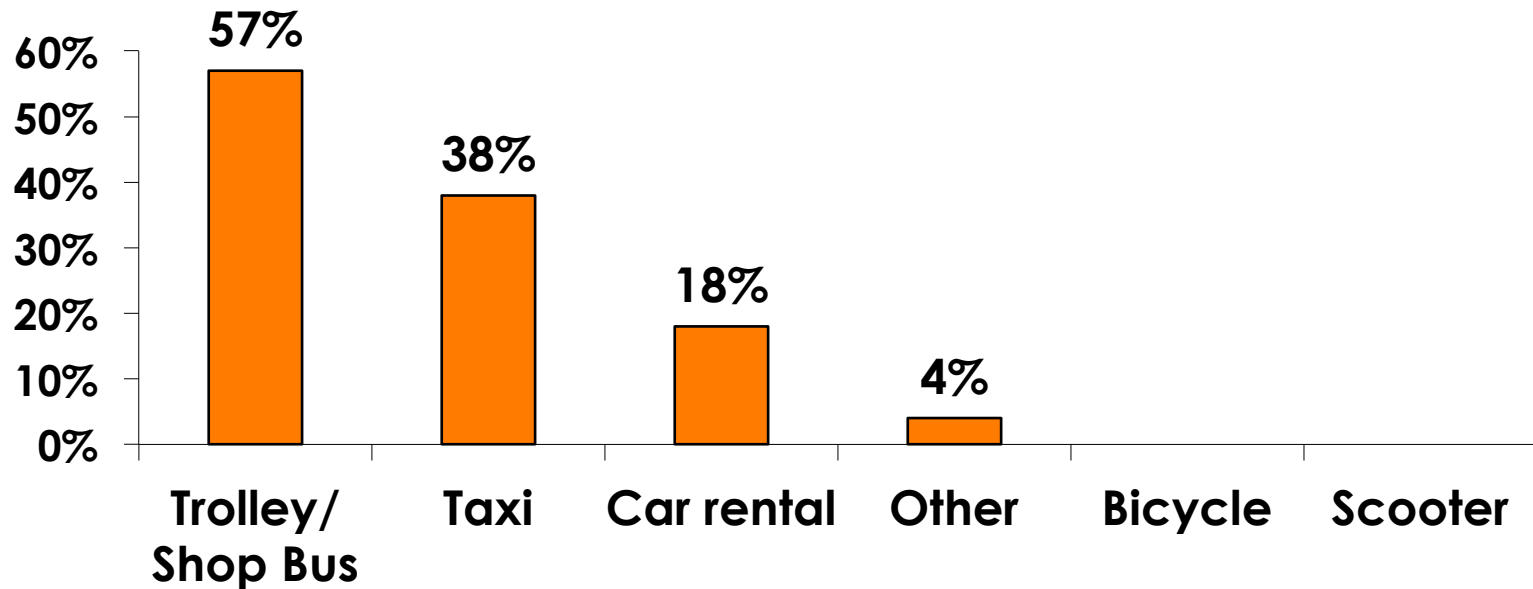
Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$25.55
Food & beverage in fast food restaurant/ convenience store	\$28.43
Food & beverage at restaurants or drinking establishments outside a hotel	\$67.88
Optional tours and activities	\$73.48
Gifts/ souvenirs for yourself/companions	\$189.49
Gifts/ souvenirs for friends/family at home	\$103.08
Local transportation	\$13.15
Other expenses not covered	\$175.34
Average Total	\$647.47

Local Transportation

n=77

Mean=\$13.15 per travel party



Guam Airport Expenditures

- \$25.41 = Mean
- \$5 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

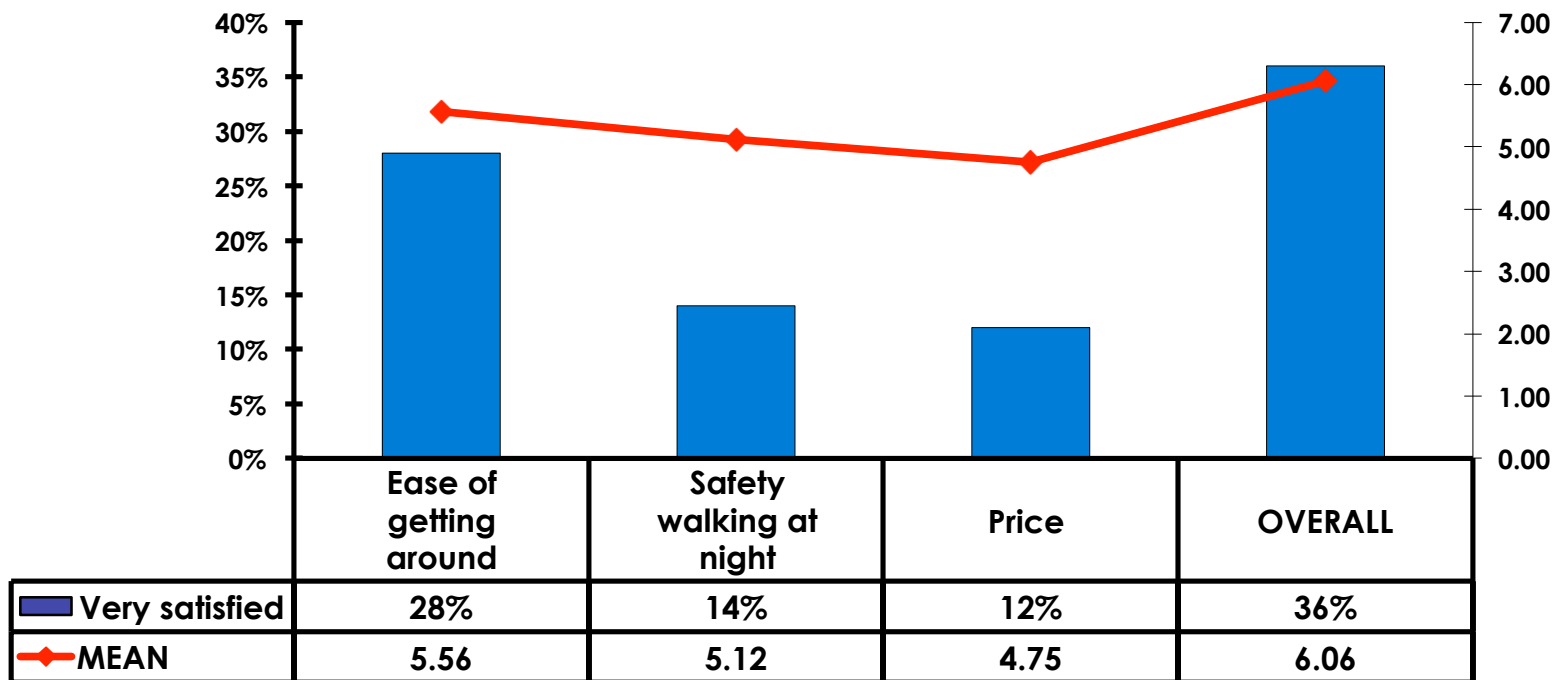
	MEAN \$
Food & Beverages	\$5.68
Gifts/Souvenirs Self	\$12.77
Gifts/Souvenirs Others	\$6.96
Total	\$25.41

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

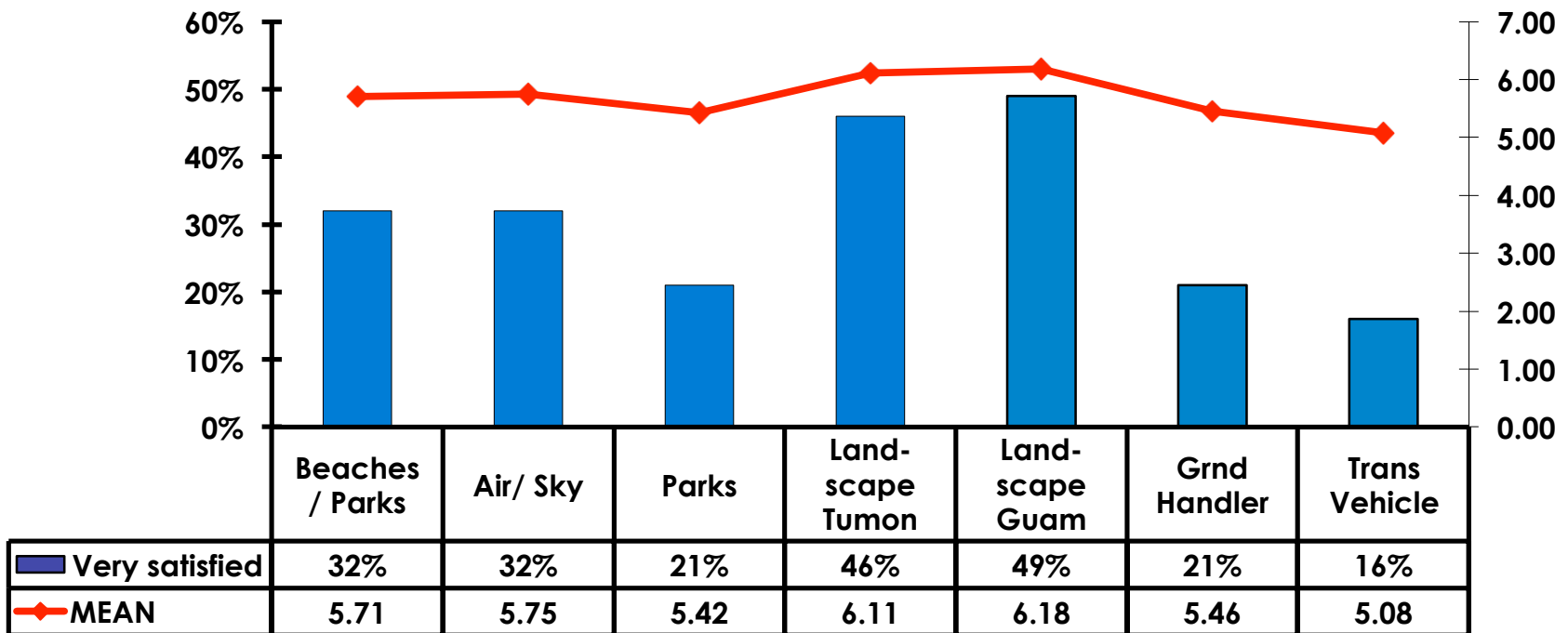
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

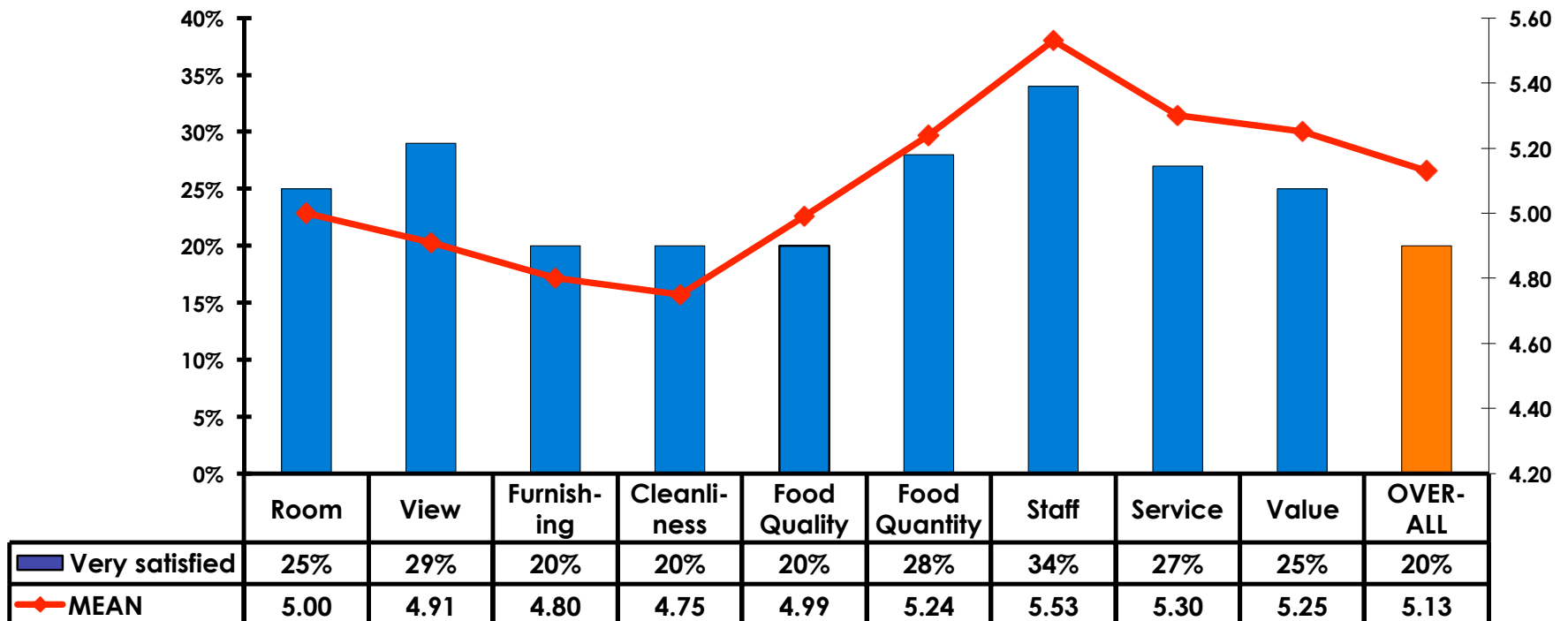
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

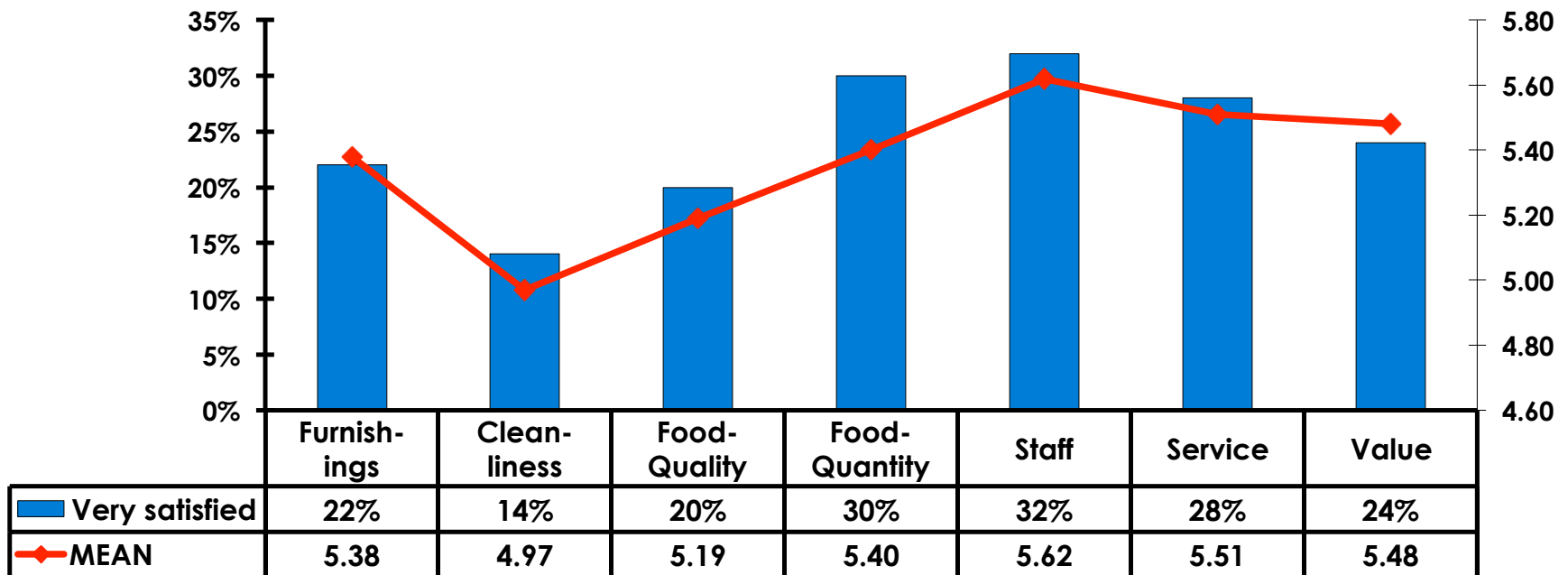
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

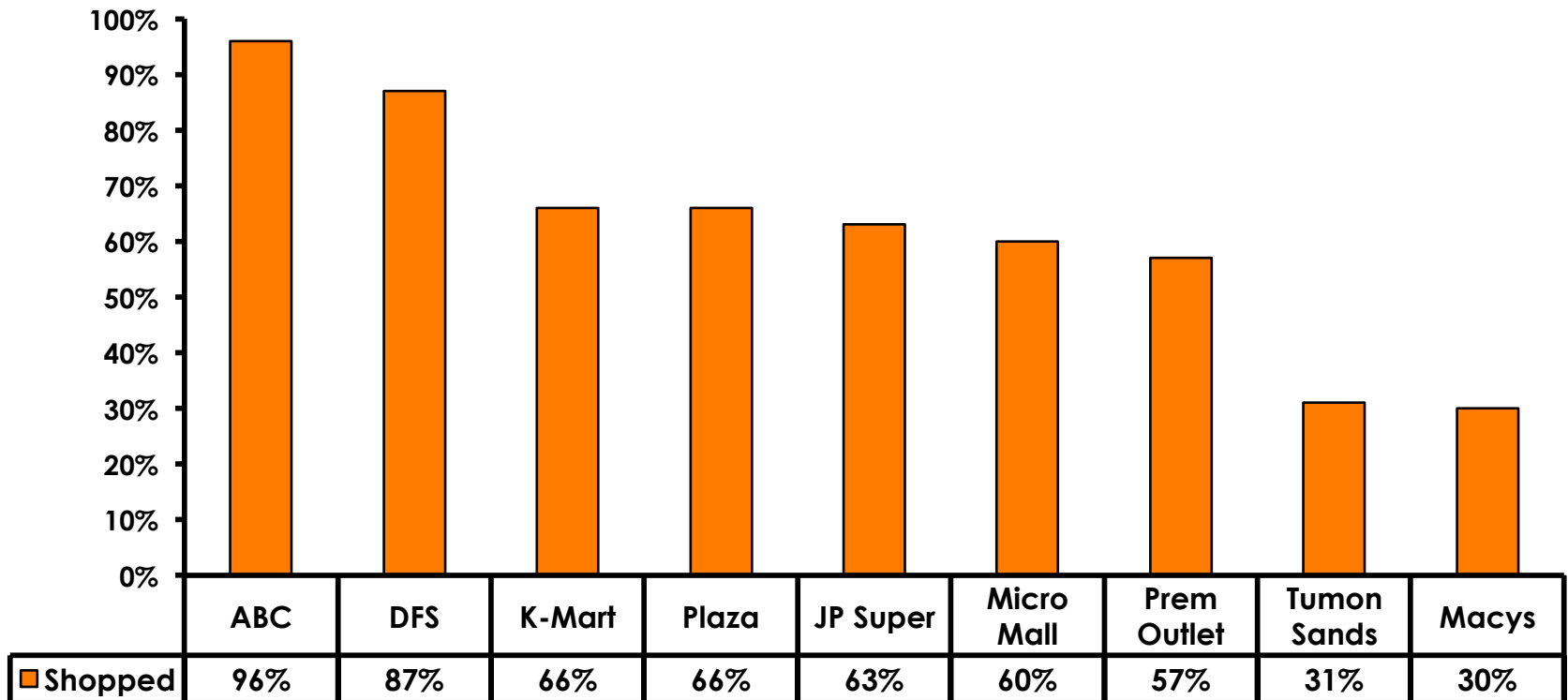
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

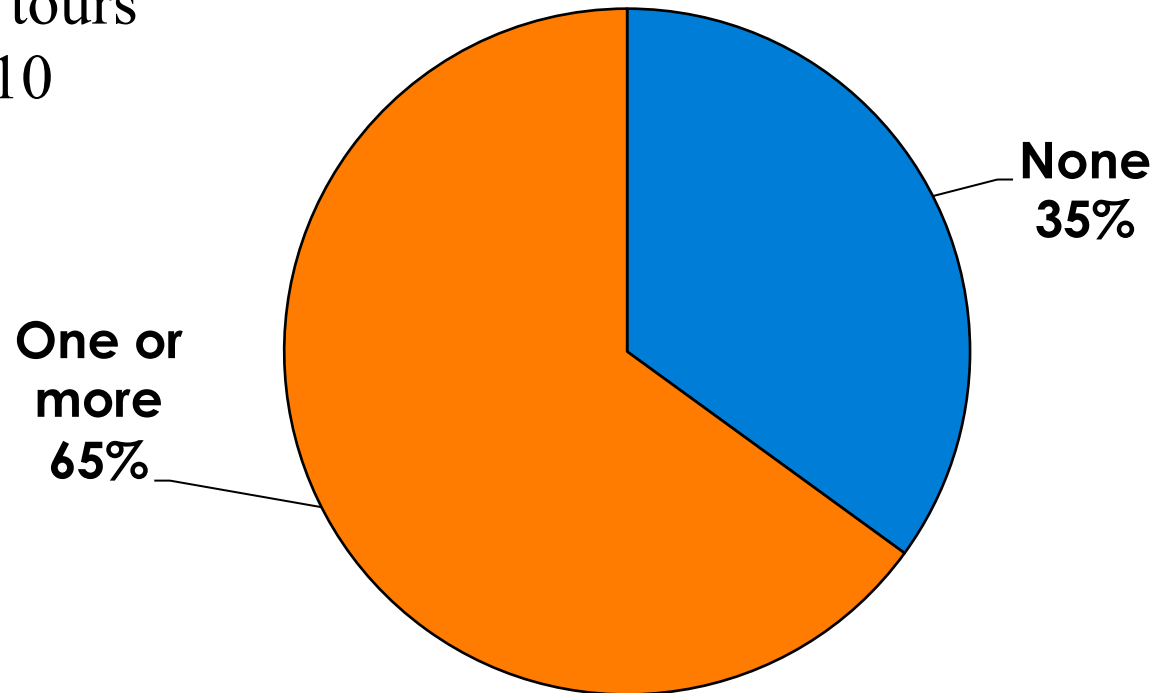
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 60%	Score of 6 to 7 = 56%
Score of 4 to 5 = 39%	Score of 4 to 5 = 41%
Score 1 to 3 = 2%	Score 1 to 3 = 3%
MEAN = 5.61	MEAN = 5.52

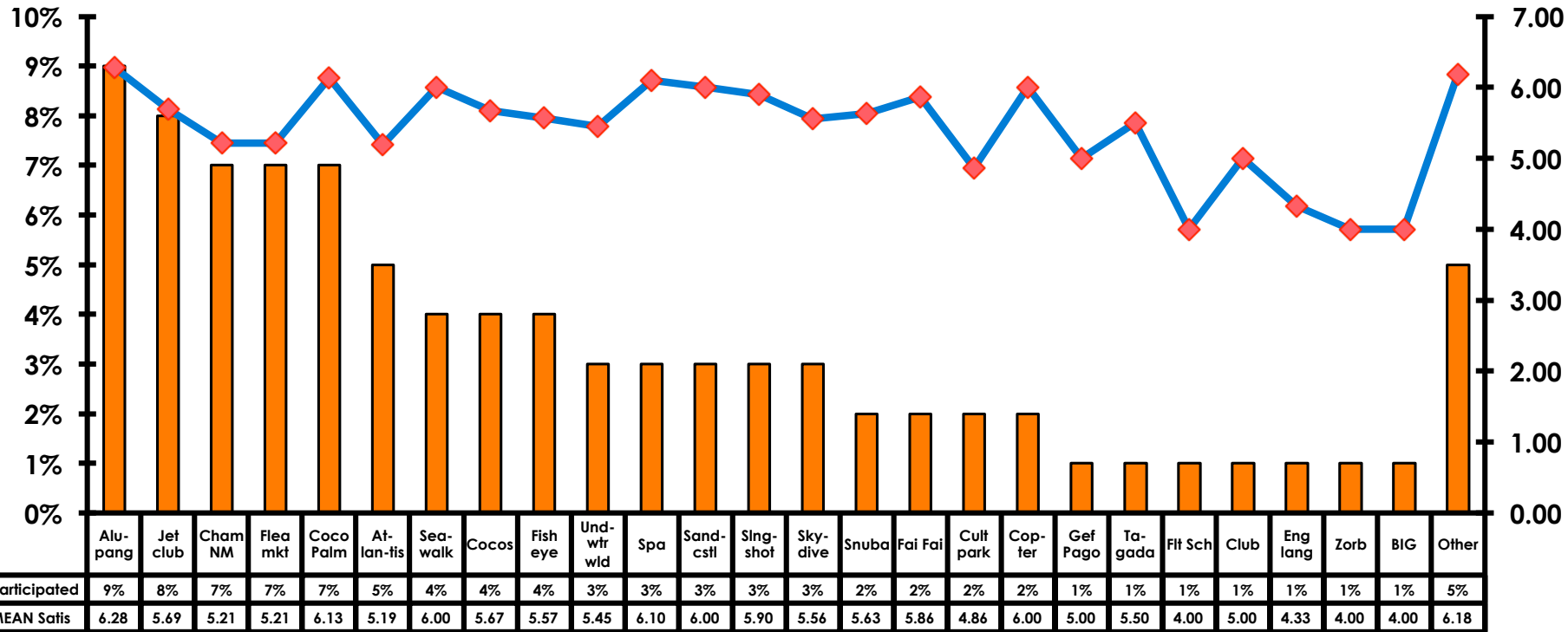
Optional Tour Participation

- Average number of tours participated in is 1.10



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 = 61%	Score of 6 to 7 = 57%
Score of 4 to 5 = 36%	Score of 4 to 5 = 41%
Score 1 to 3 = 3%	Score 1 to 3 = 2%
MEAN = 5.60	MEAN = 5.56

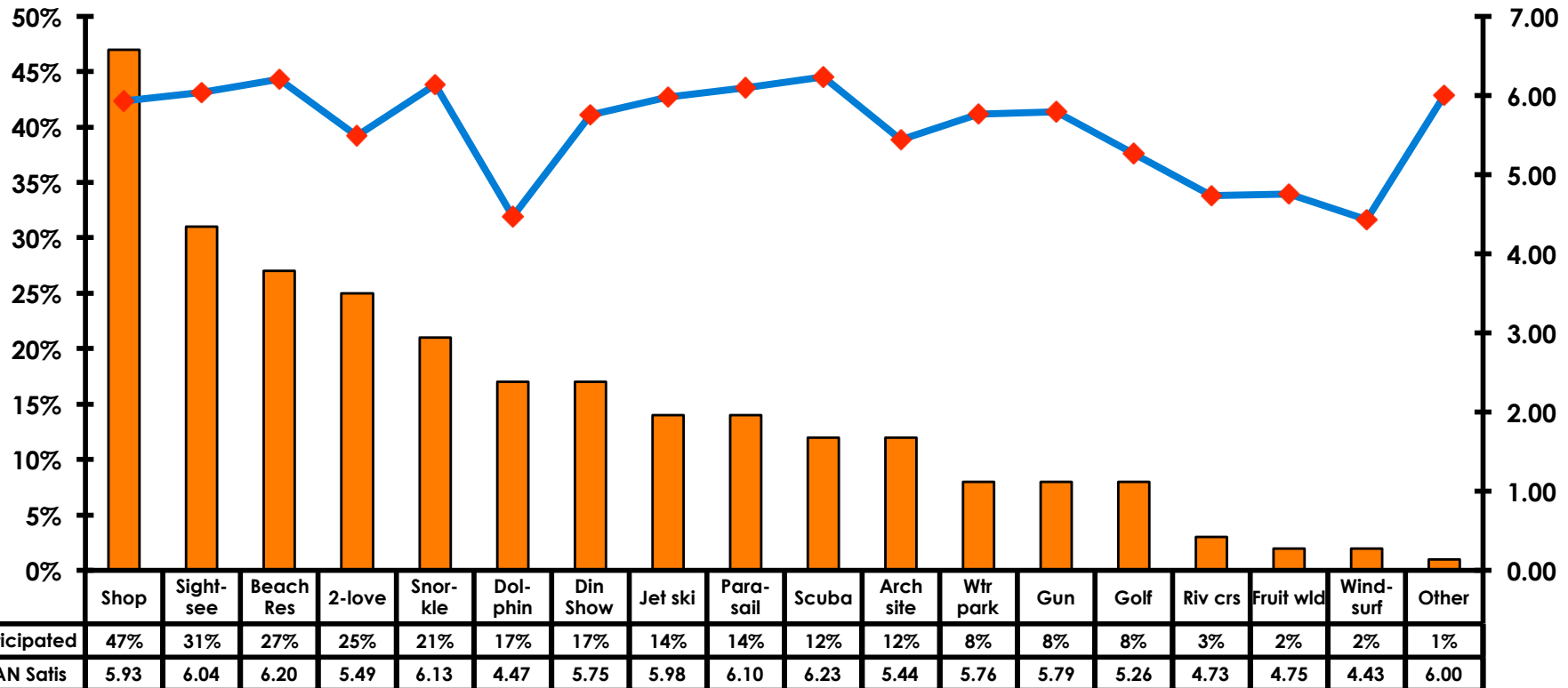
Night Tours Satisfaction

7pt Rating Scale

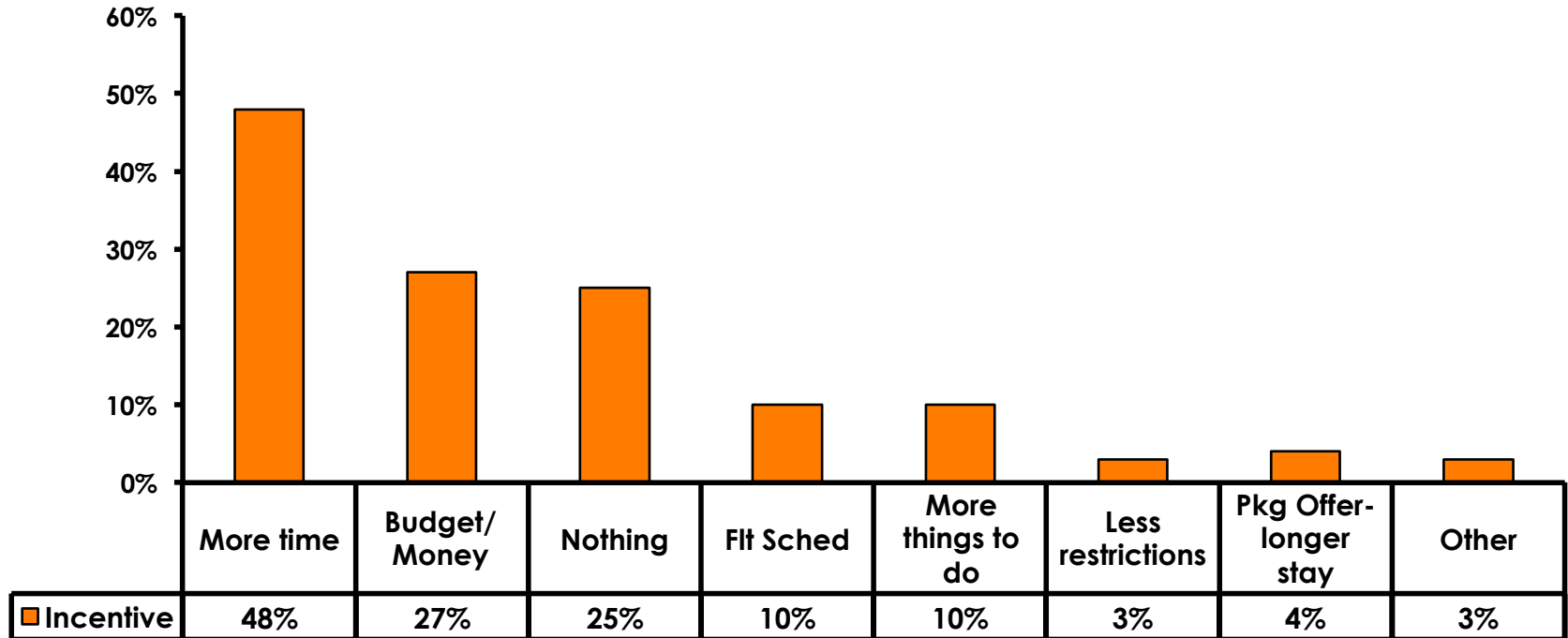
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 32%	Score of 6 to 7 = 32%
Score of 4 to 5 = 65%	Score of 4 to 5 = 65%
Score 1 to 3 = 3%	Score 1 to 3 = 3%
MEAN = 4.86	MEAN = 4.83

Satisfaction with Other Activities



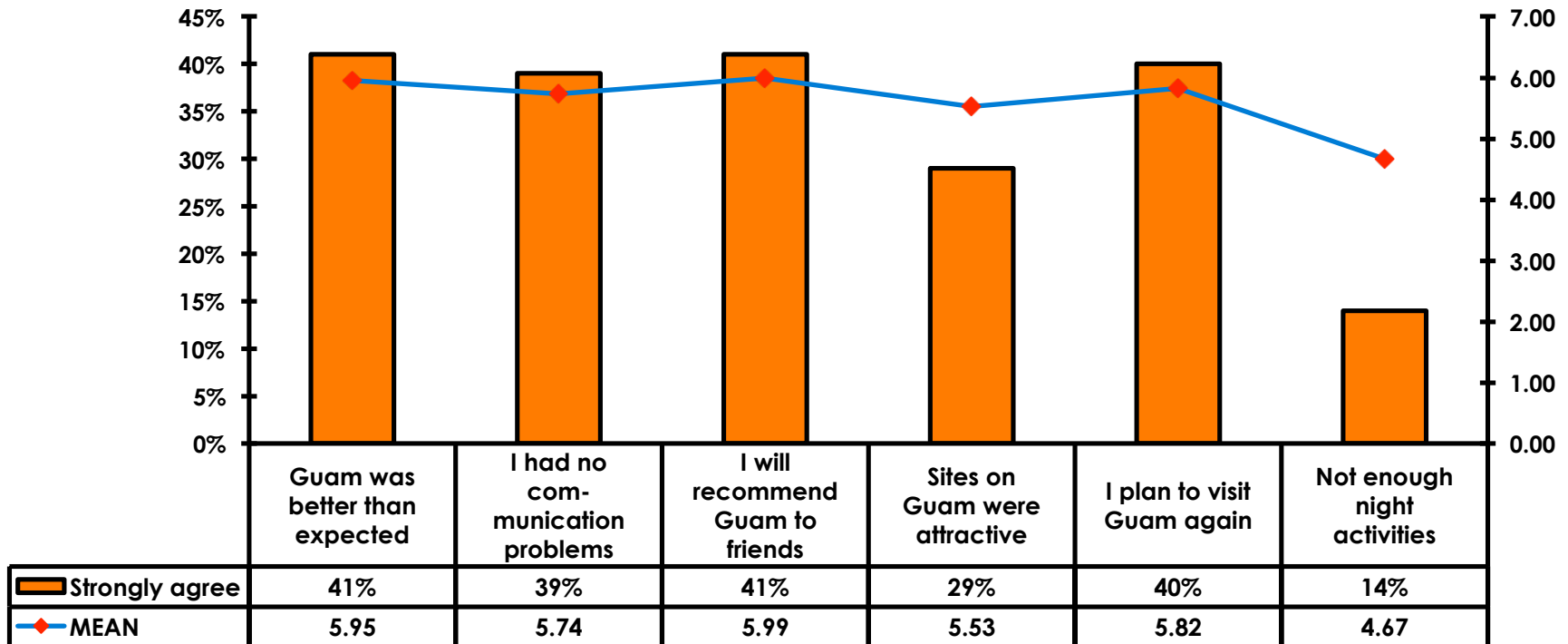
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

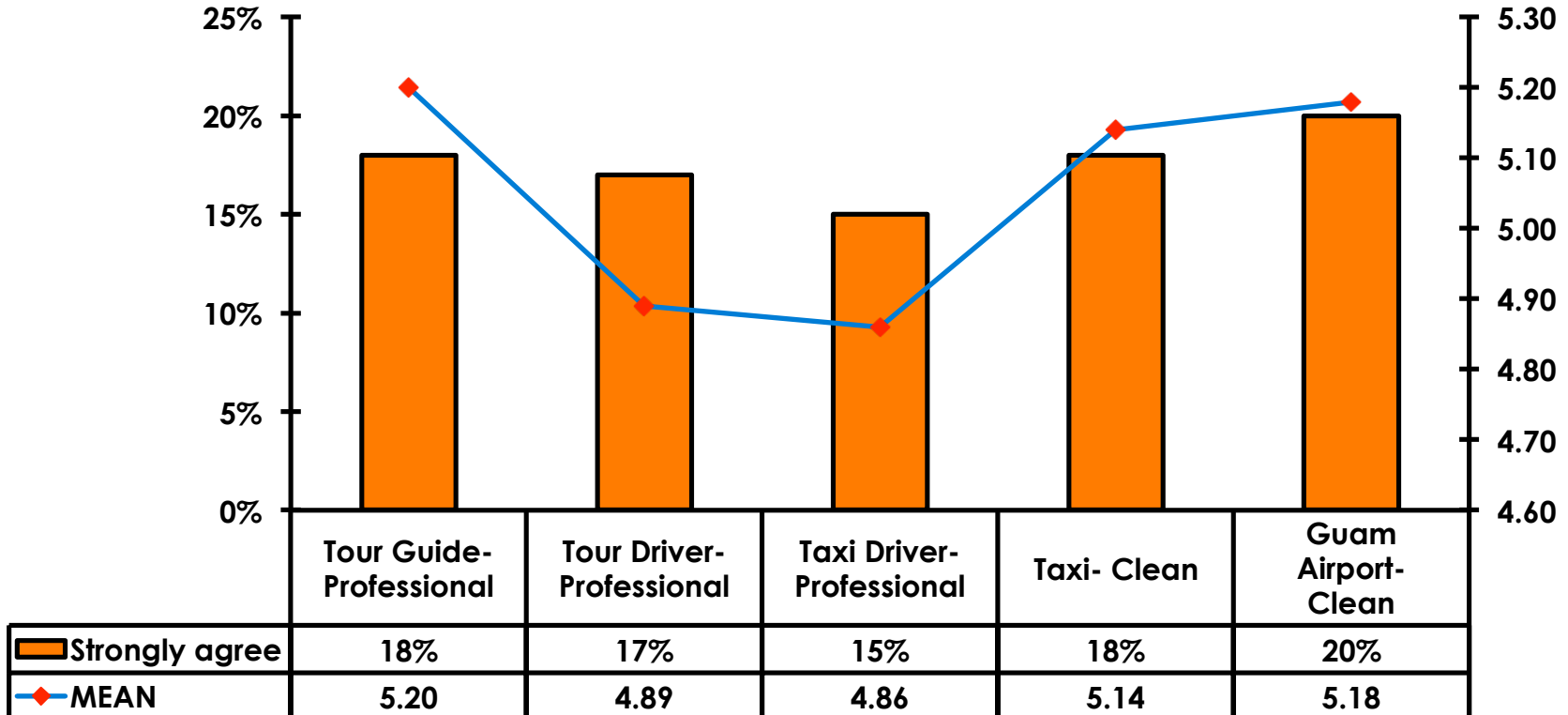
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

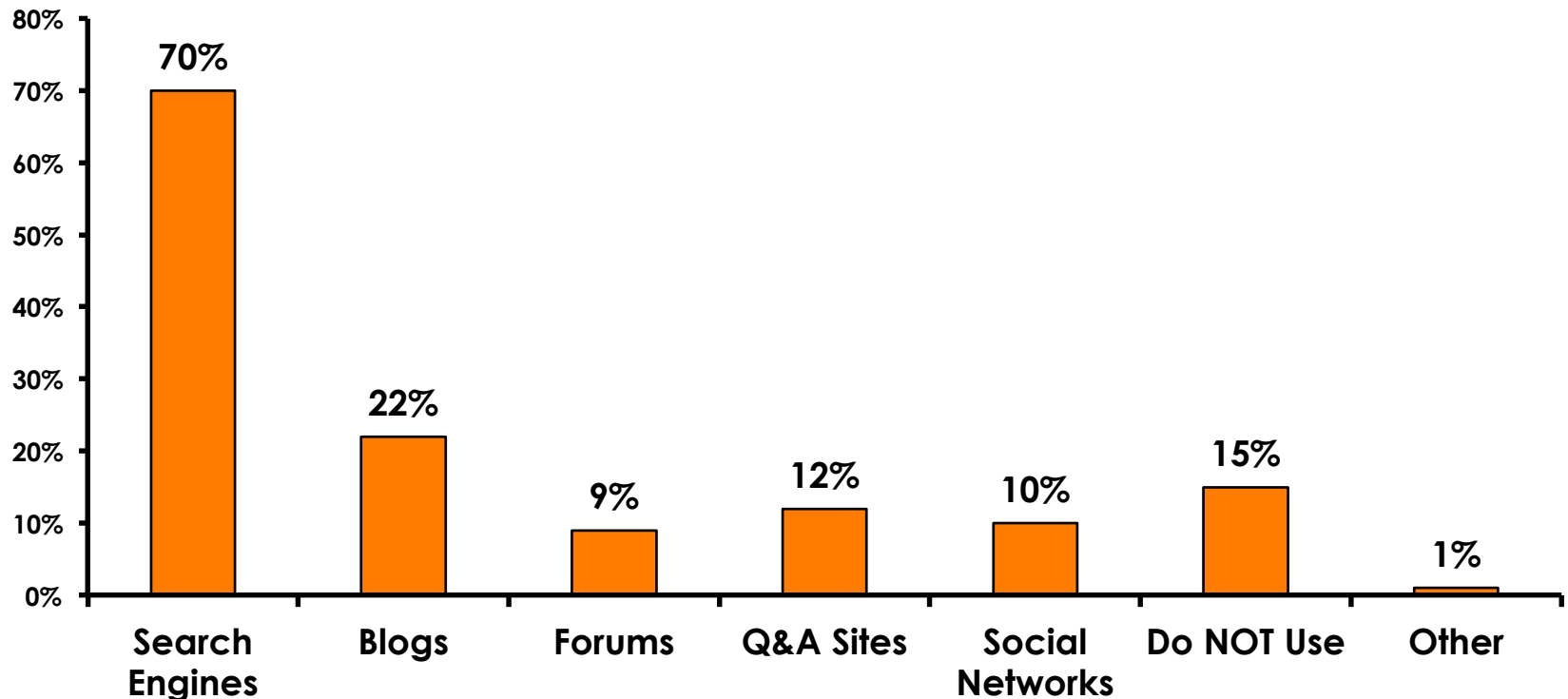
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



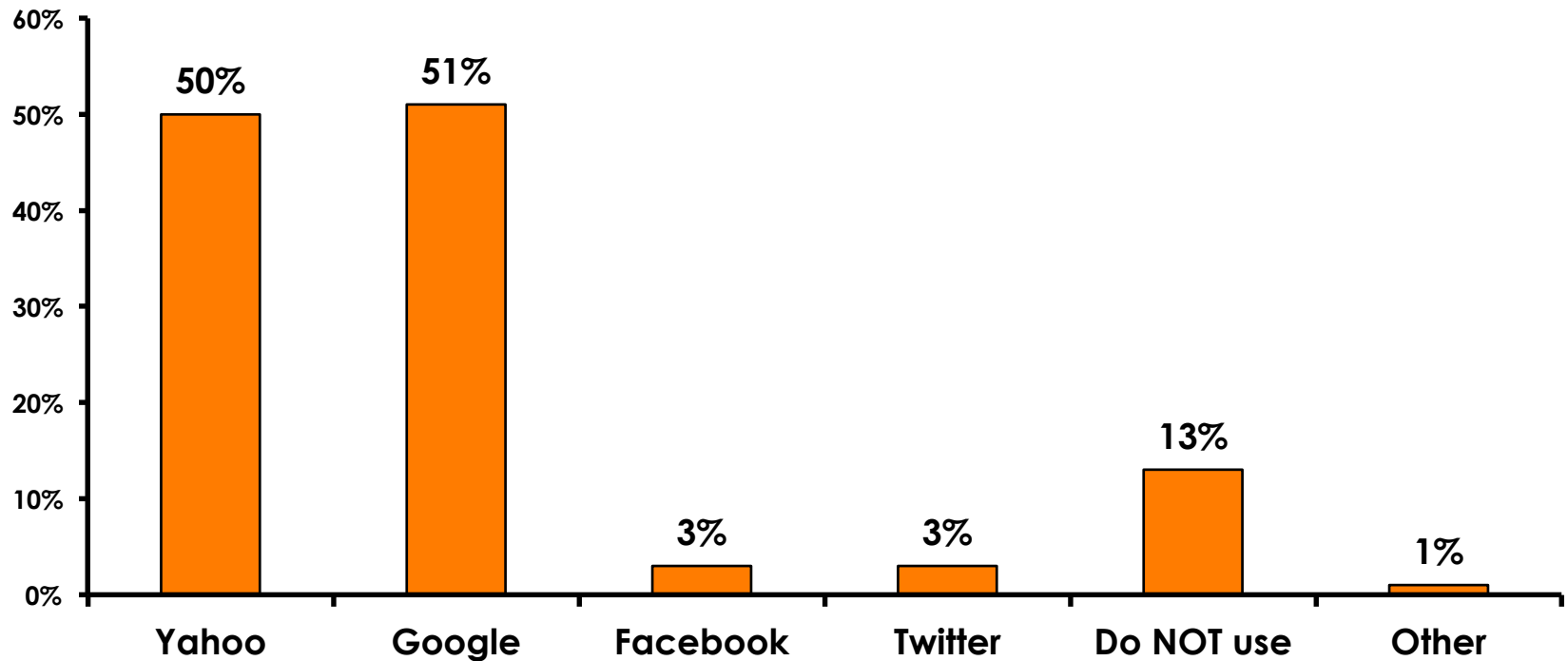
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

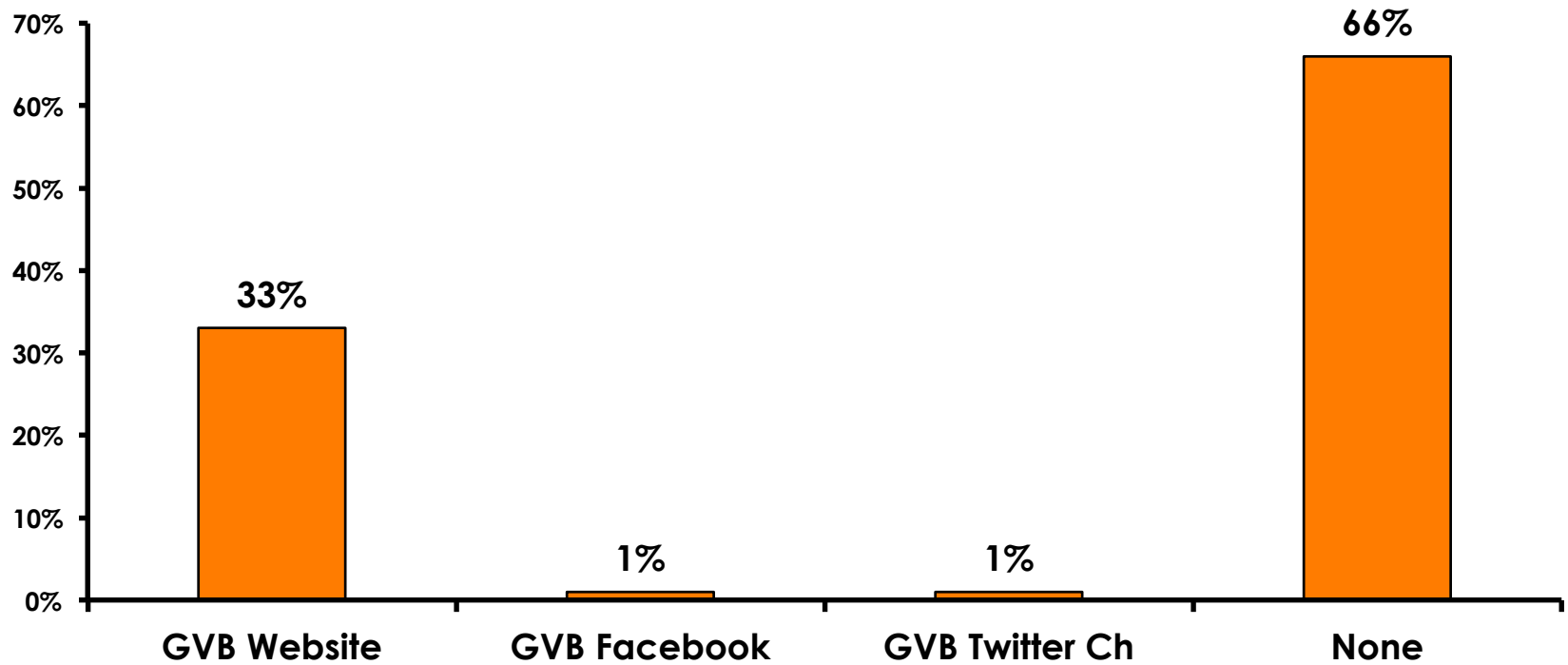


Internet- Things To Do

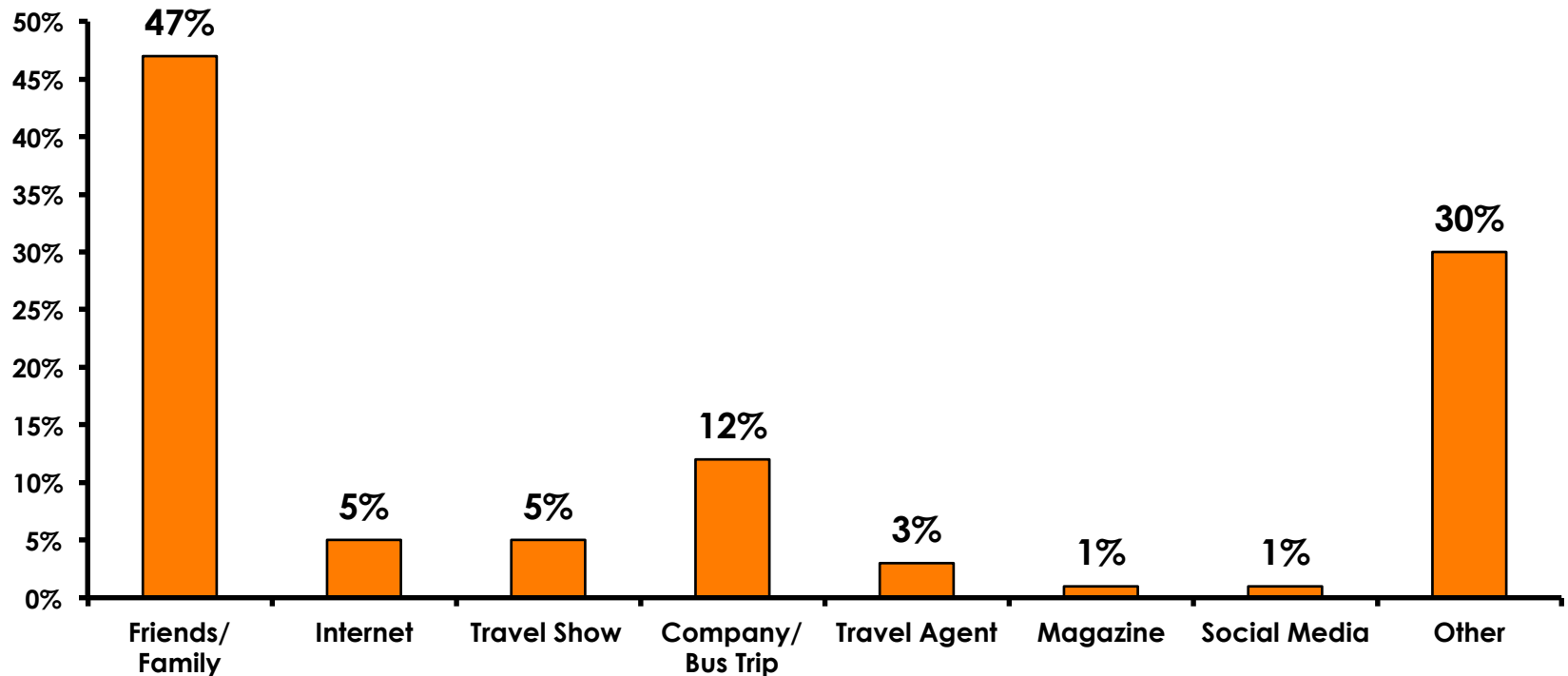
Sources of Info



Internet- GVB Sources

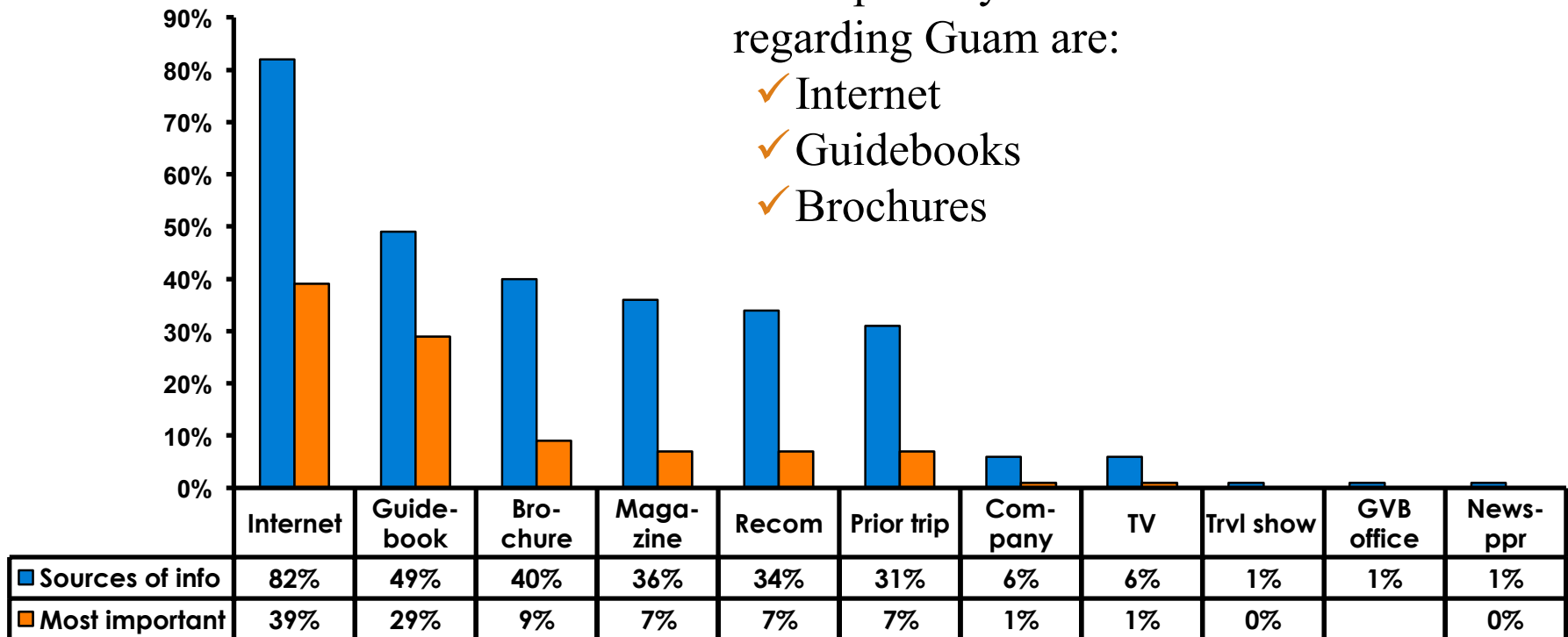


Travel Motivation- Info Sources



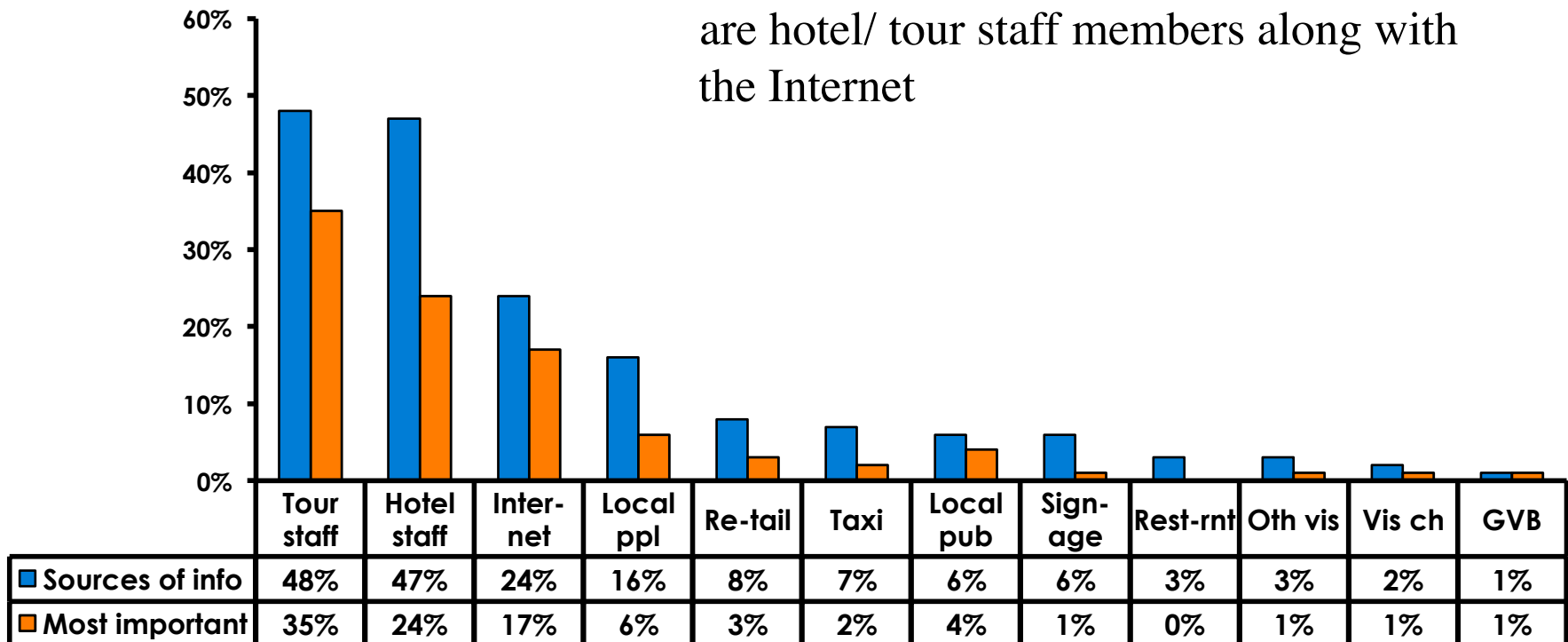
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

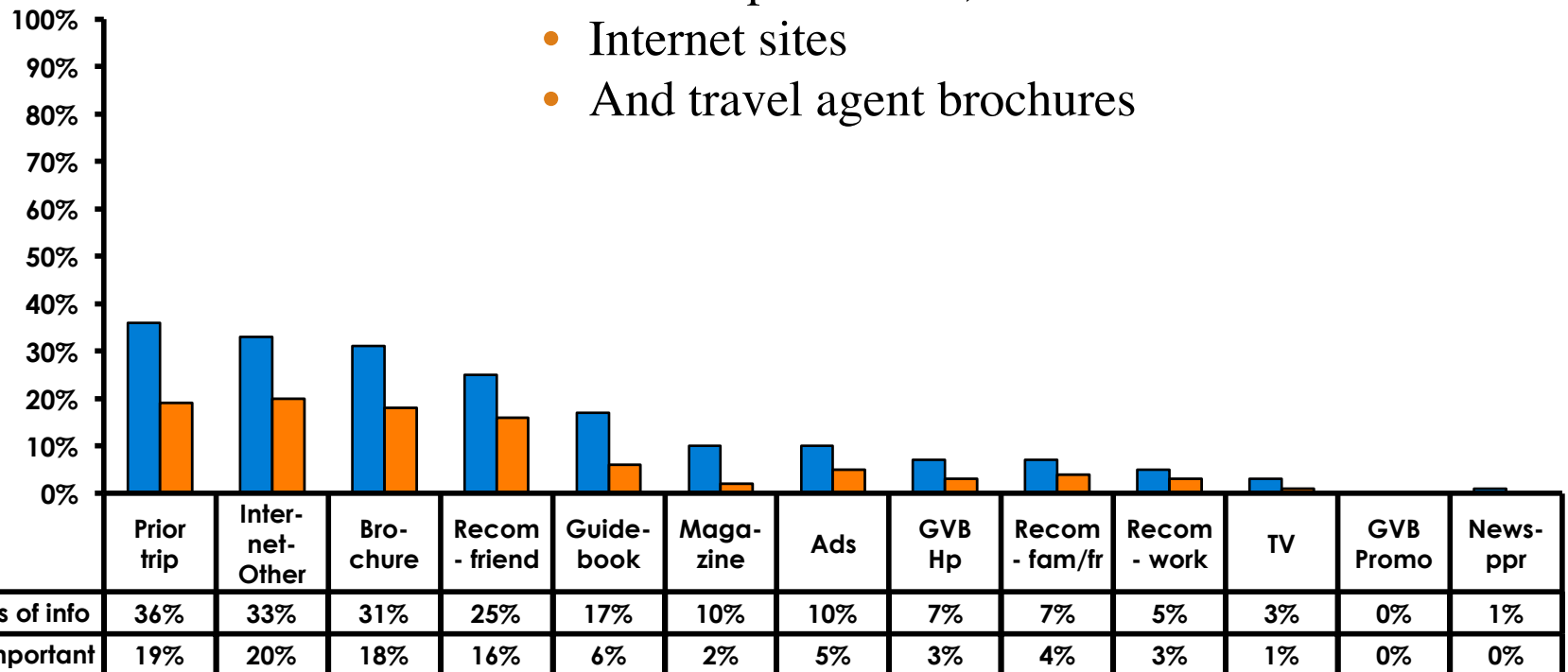
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

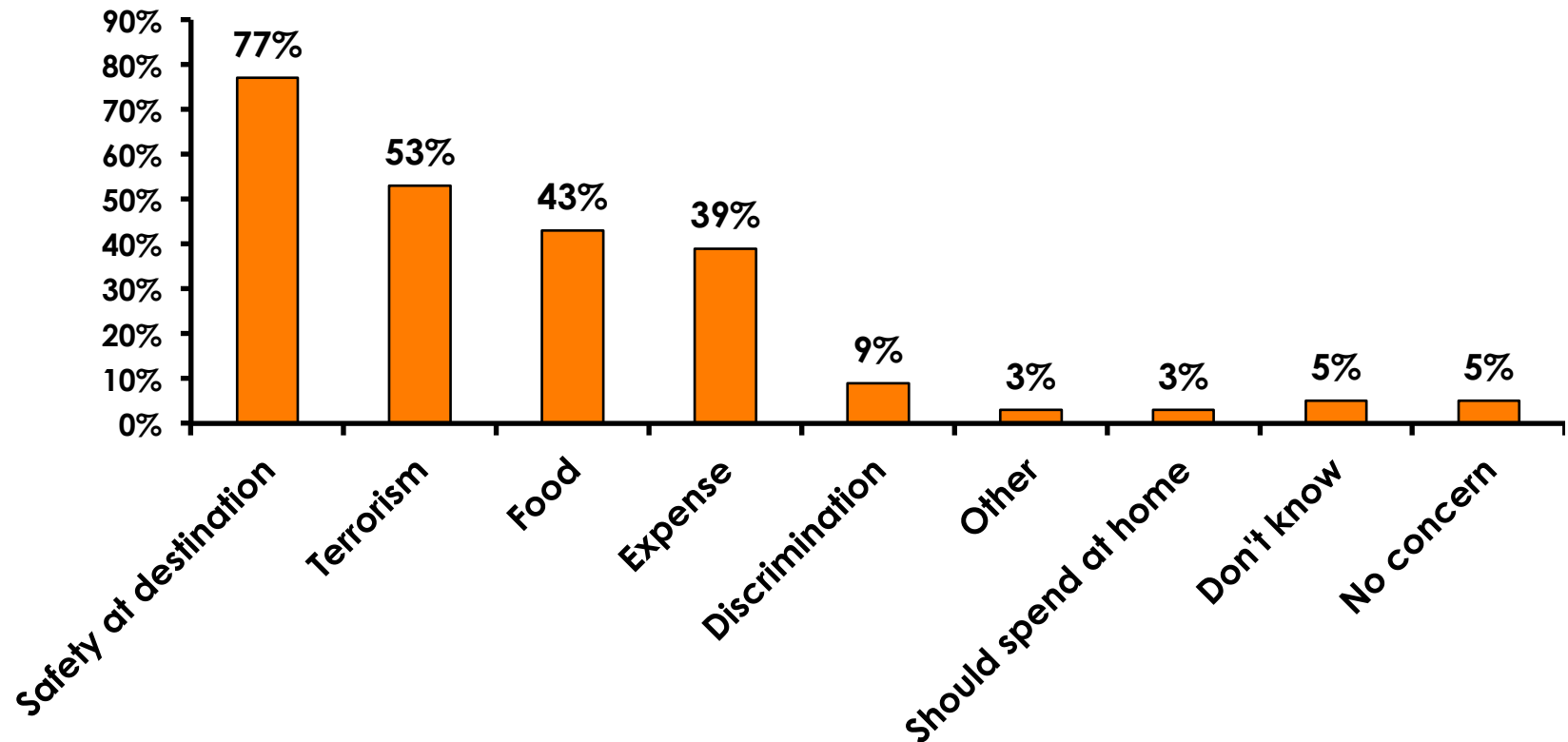
The primary motivational sources of information were.

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



SECTION 6 **OTHER ISSUES**

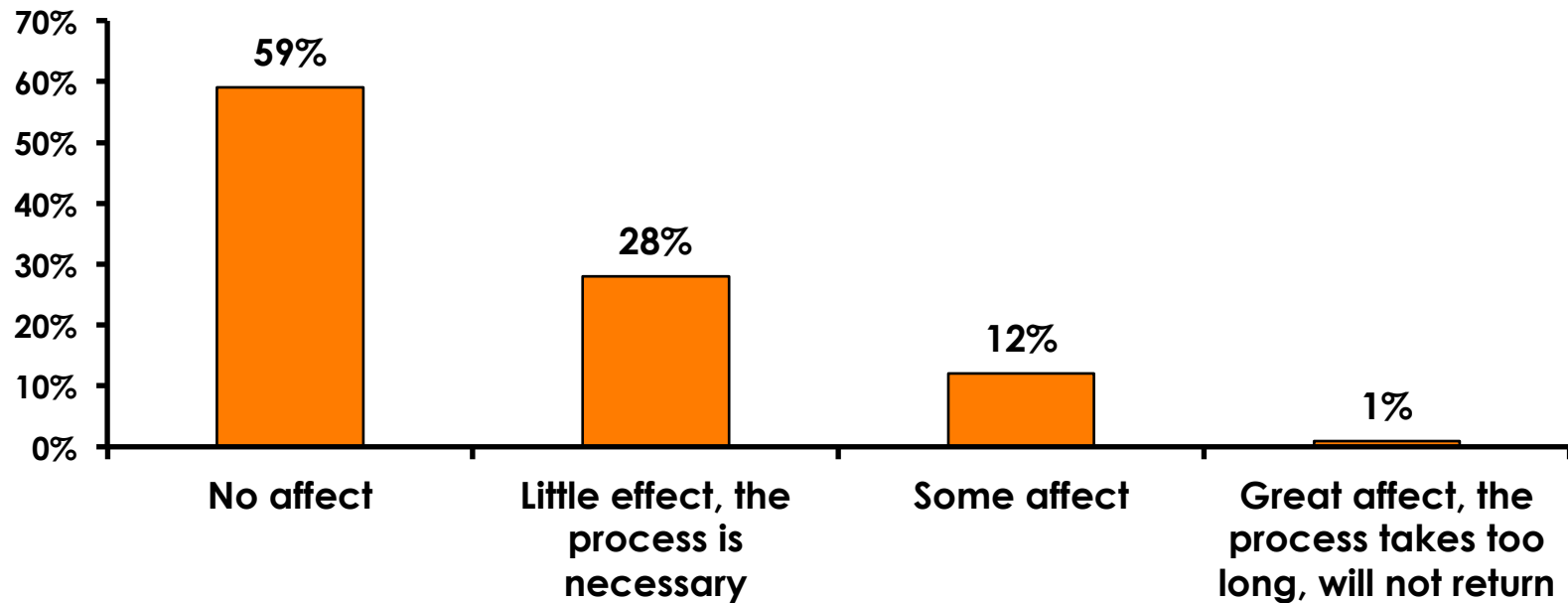
Concerns about travel outside of Japan - Overall



Concerns about travel outside of Japan - By Age & Income

		TOTAL	AGE				Q26								
		-	18-24	25-34	35-49	50+	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q21	Safety	77%	73%	83%	77%	68%	79%	78%	78%	85%	78%	79%	74%	75%	
	Terrorism	53%	52%	59%	48%	41%	47%	61%	51%	57%	58%	45%	45%	50%	
	Food	43%	38%	50%	41%	45%	26%	51%	49%	43%	51%	50%	26%	42%	
	Expense	39%	40%	44%	34%	27%	42%	39%	39%	43%	44%	38%	29%	42%	
	Discrimination against Japanese	9%	8%	8%	10%	9%	11%	7%	16%	6%	5%	5%	10%	17%	
	Don't know	5%	4%	5%	5%	5%	11%	7%	2%	4%	2%	2%			
	No concerns	5%	4%	5%	1%	18%		2%	4%	4%	2%	7%	10%	8%	
	Other	3%	6%	2%		14%		5%	2%	2%	5%	2%	7%		
	Should spend at home	3%	6%	2%		5%		2%	2%	6%	2%	2%		8%	
	Total	Count	350	106	140	79	22	19	41	51	47	55	42	42	12

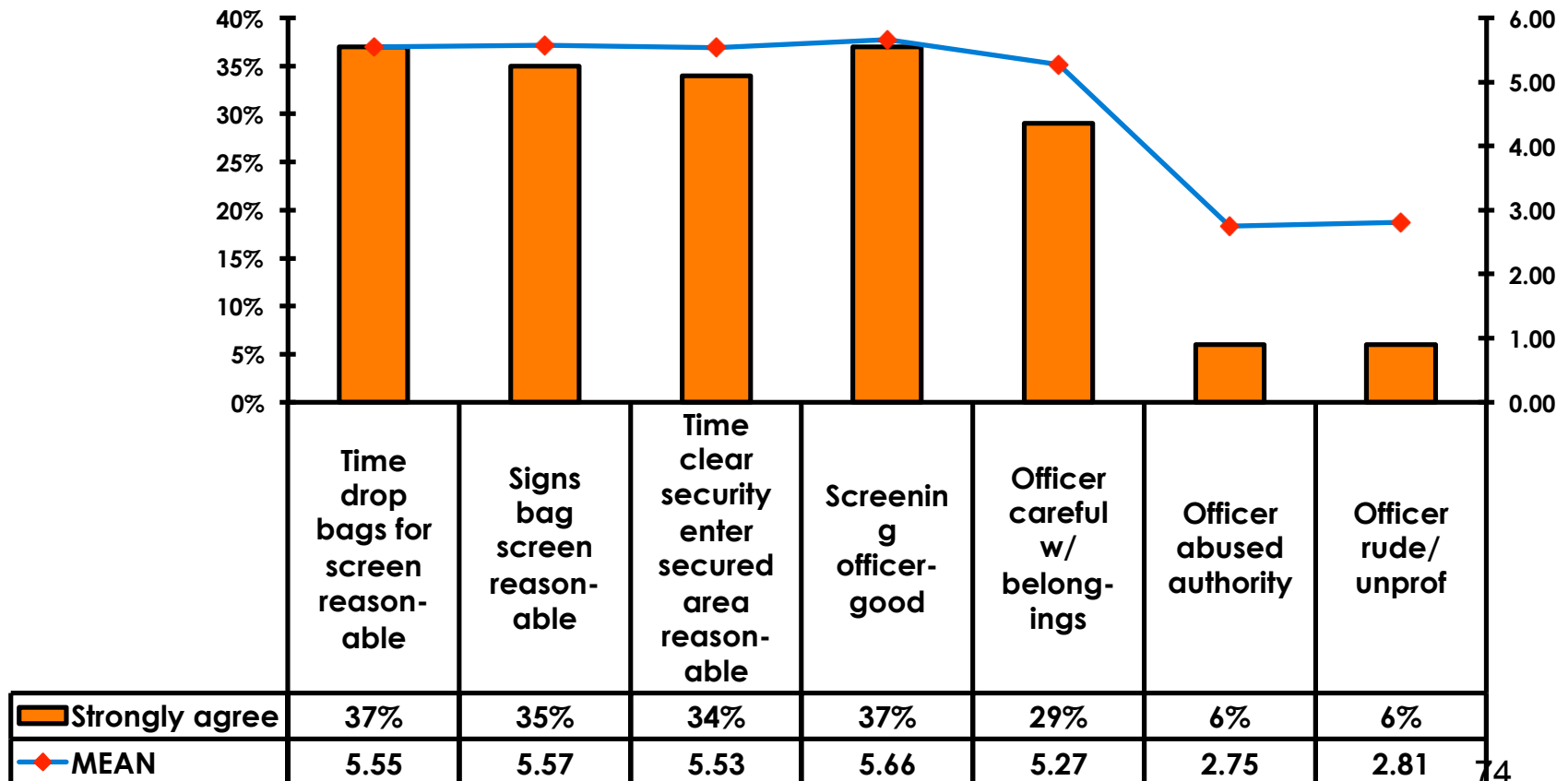
Security Screening/ Immigration Process at Guam International Airport



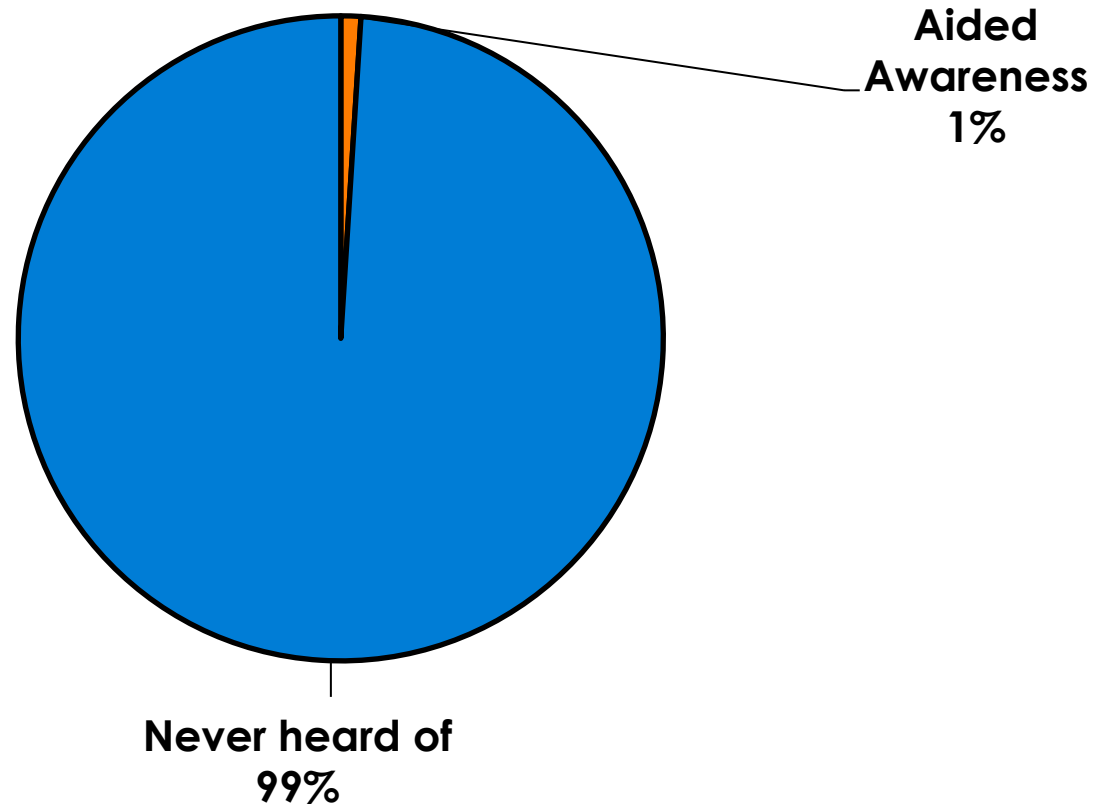
Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



Shop Guam Festival



Shop Guam Festival - Impact

n=3

