



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013

OCTOBER 2012



Prepared by: QMark Research

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Background & Methodology

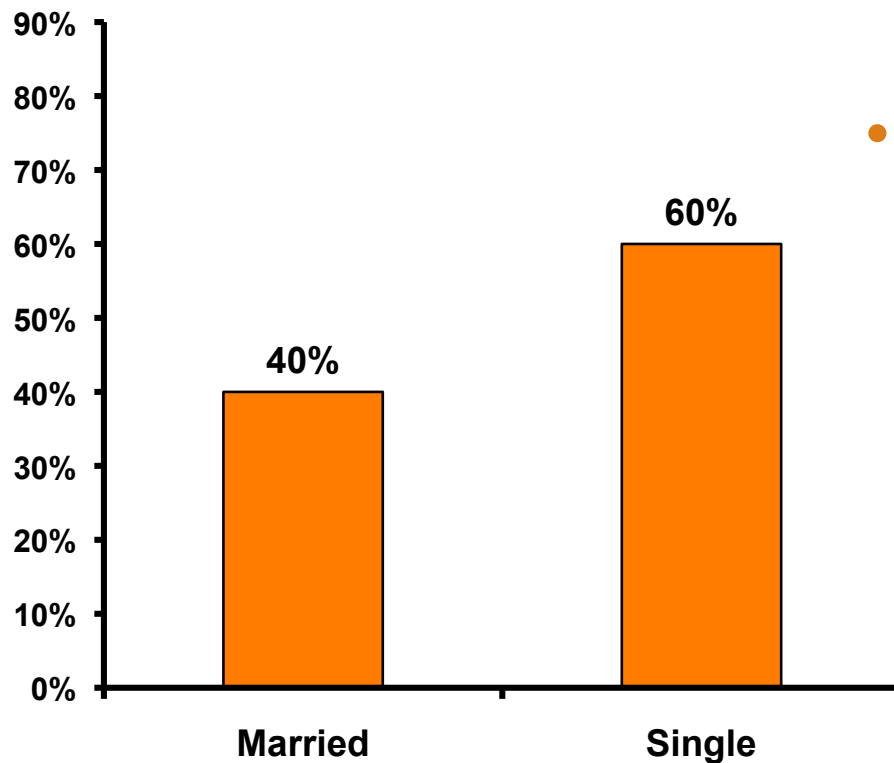
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing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

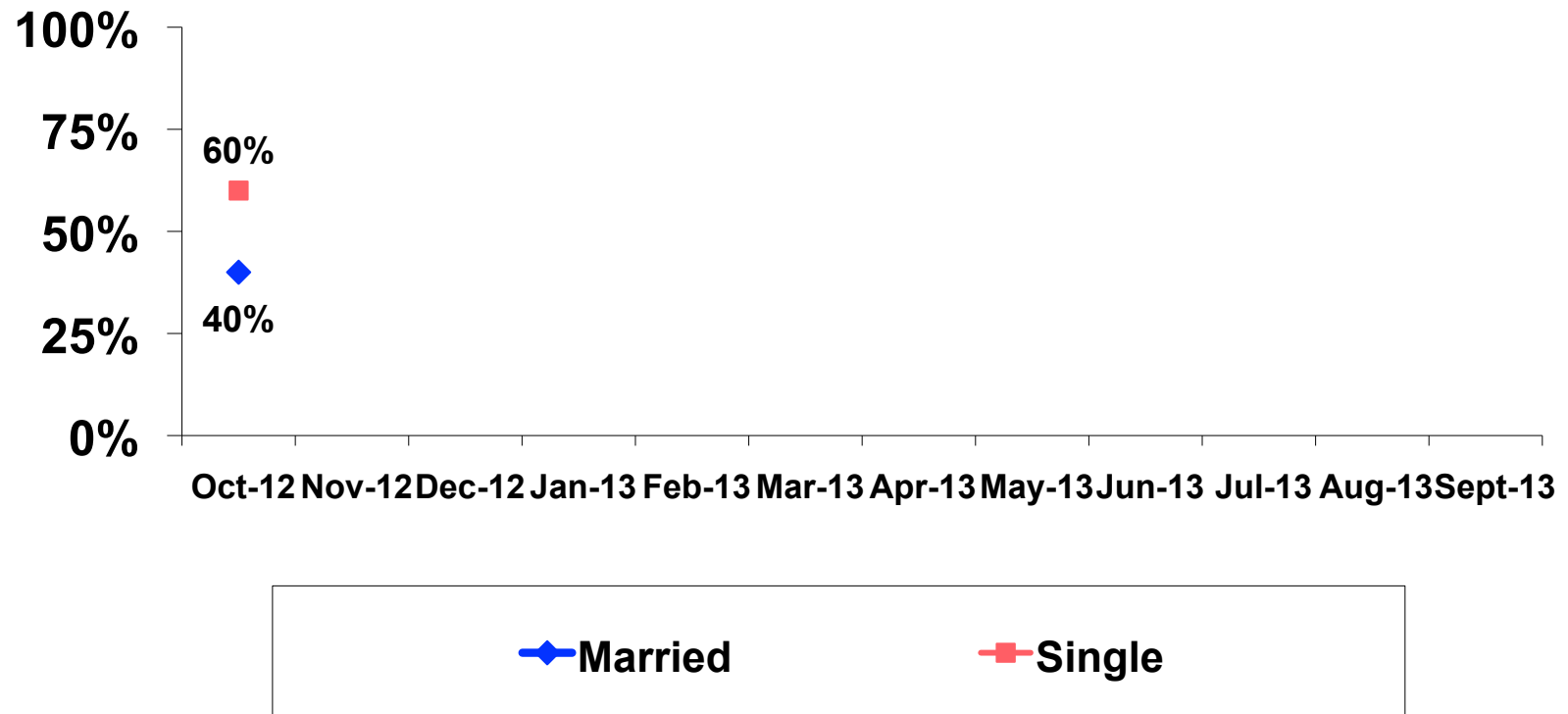
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

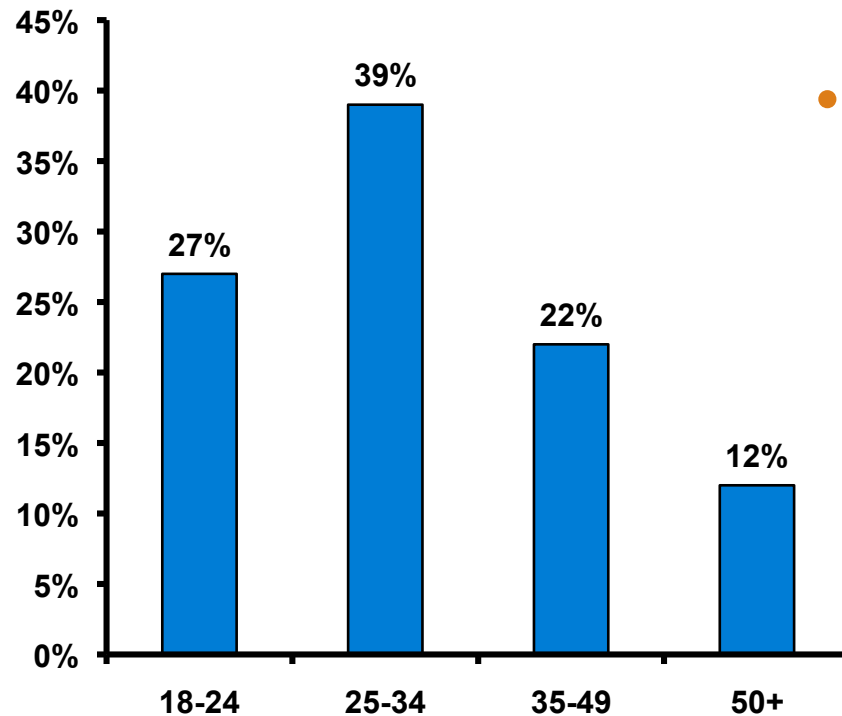


- Single visitors stay for shorter periods of time.

Marital Status

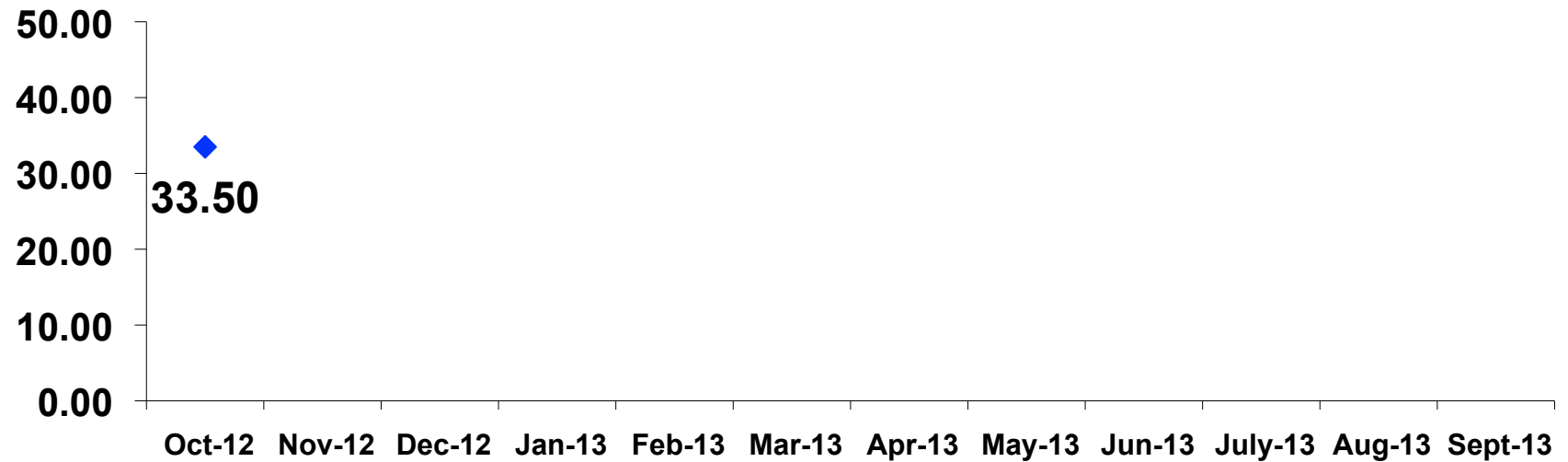


Age - Overall

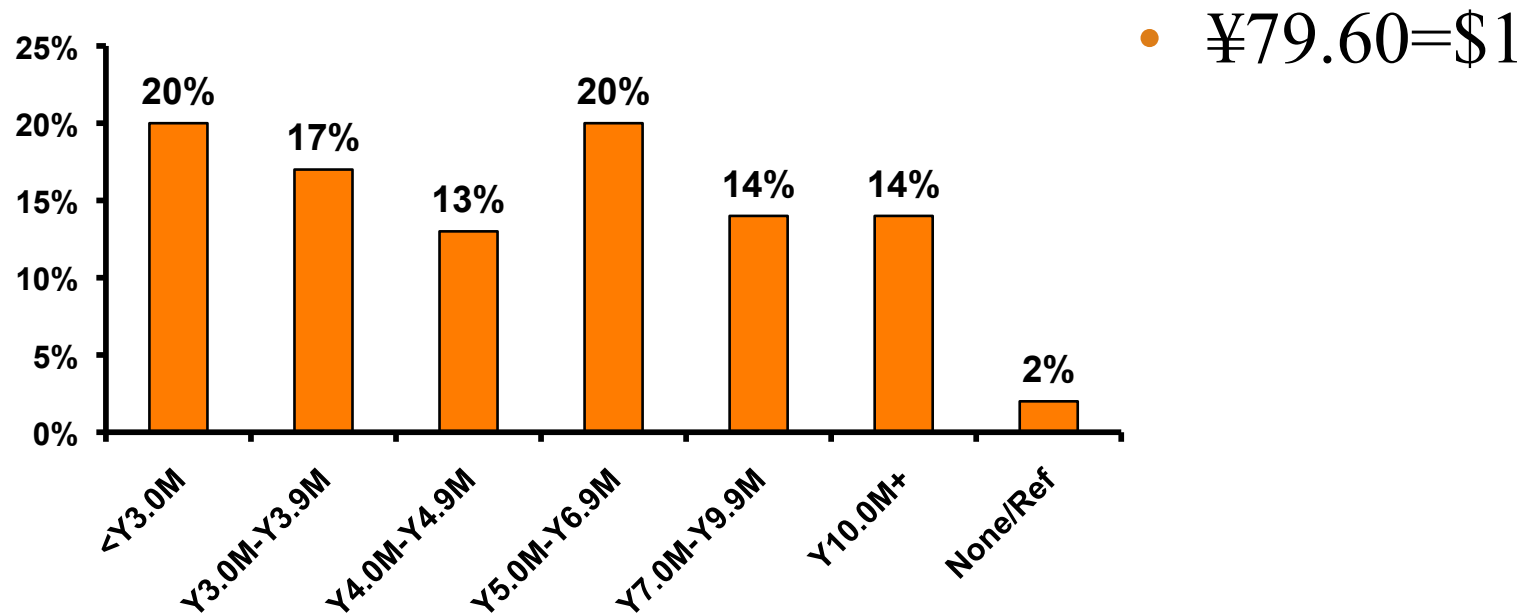


- The average age of the respondents is 33.50 years of age.

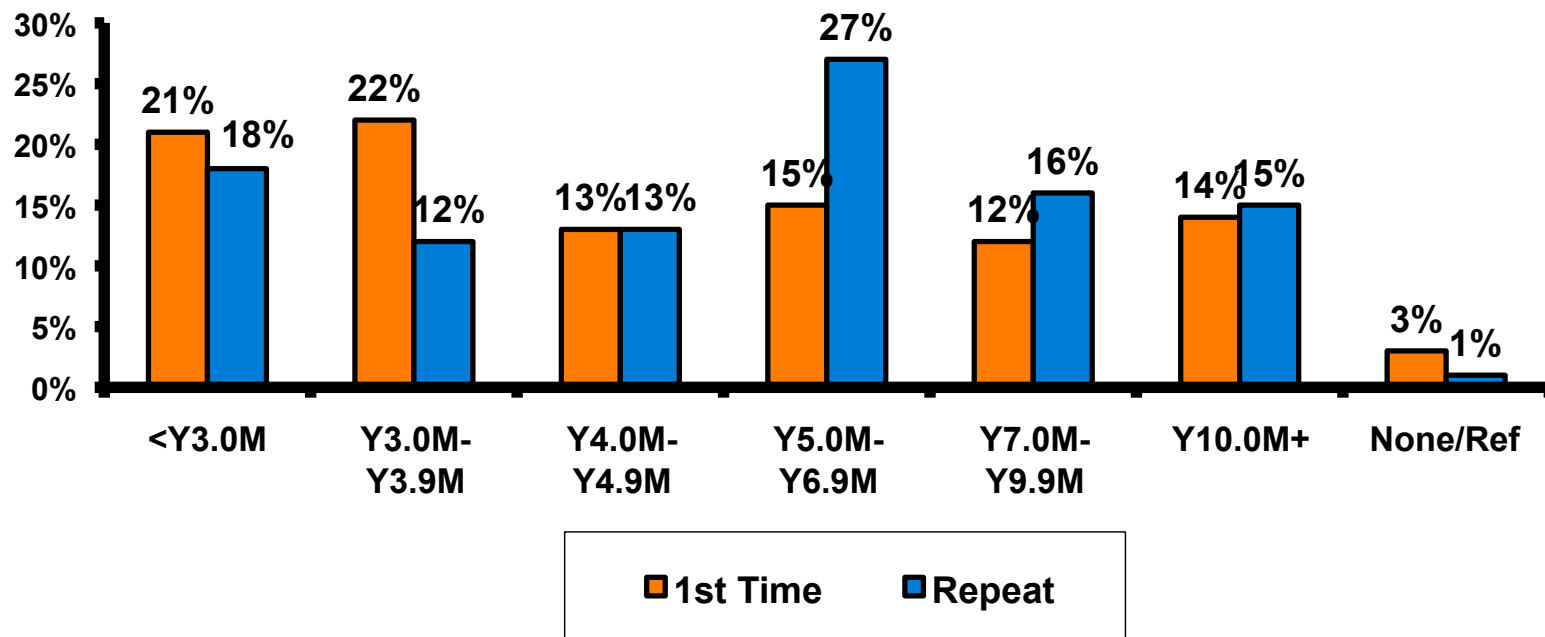
Average Age



Personal Income



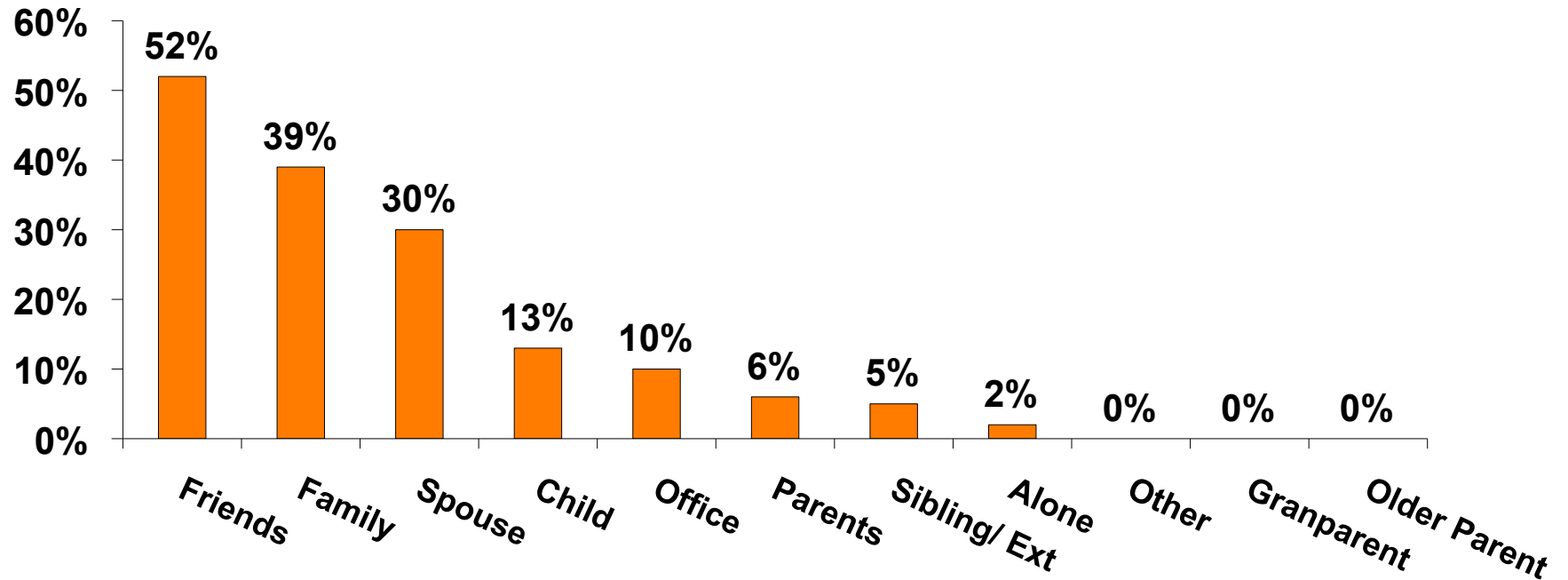
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	19	10	9	13	5	1	
		Column N %	6%	6%	6%	17%	4%	1%	
	Y2.0M-Y3.0M	Count	44	18	26	13	21	6	4
		Column N %	14%	11%	17%	17%	17%	8%	11%
	Y3.0M-Y4.0M	Count	53	19	34	16	23	9	5
		Column N %	17%	12%	22%	21%	19%	13%	13%
	Y4.0M-Y5.0M	Count	41	25	16	10	19	7	5
		Column N %	13%	16%	10%	13%	15%	10%	13%
	Y5.0M-Y7.0M	Count	62	30	32	3	32	17	10
		Column N %	20%	19%	21%	4%	26%	24%	26%
	Y7.0M-Y10.0M	Count	42	25	17	7	9	19	7
		Column N %	14%	16%	11%	9%	7%	27%	18%
	Y10.0M+	Count	44	28	16	10	13	12	7
		Column N %	14%	18%	10%	13%	11%	17%	18%
	No Income	Count	6	3	3	5	1		
		Column N %	2%	2%	2%	6%	1%		
	Total	Count	311	158	153	77	123	71	38

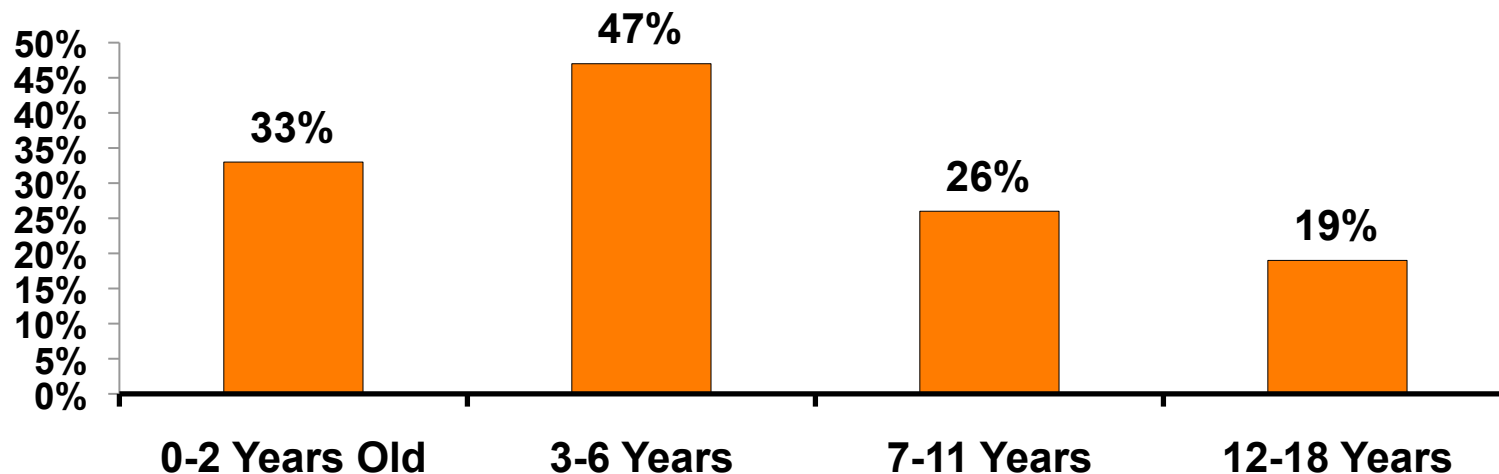
Travel Companions



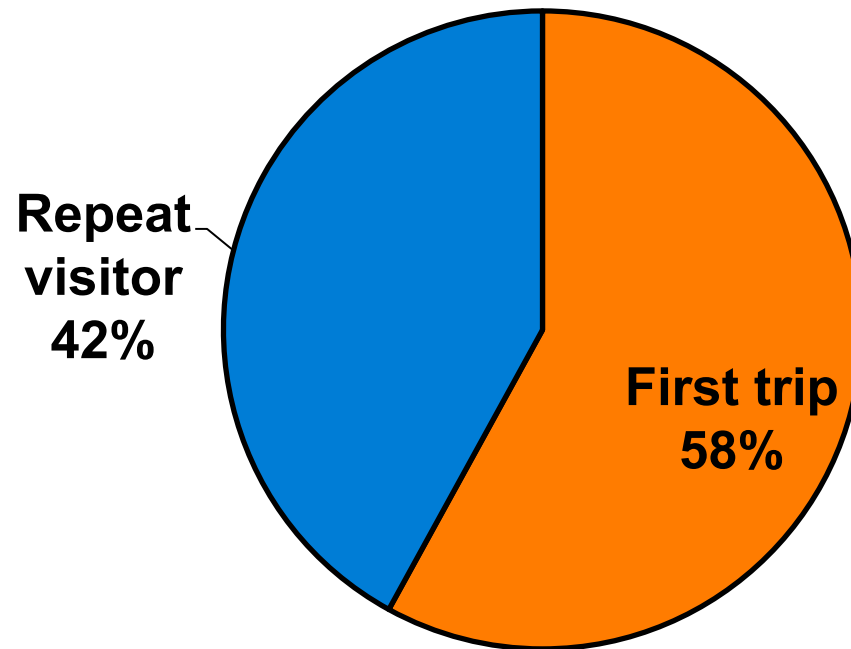
Number of Children Travel Party

N=45 total respondents traveling with children.

(Of those N=45 respondents, there is a total of 58 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



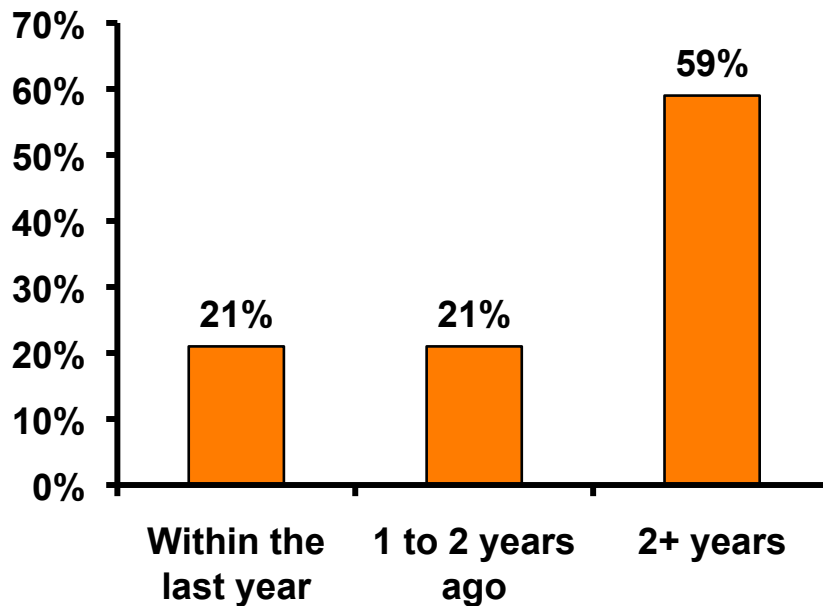
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	177	97	77
		Column N %	50%	49%	52%
	Female	Count	174	103	70
		Column N %	50%	52%	48%
	Total	Count	351	200	147
		Column N %			
AGE	18-24	Count	93	70	22
		Column N %	27%	35%	15%
	25-34	Count	136	75	59
		Column N %	39%	38%	40%
	35-49	Count	77	28	48
		Column N %	22%	14%	33%
	50+	Count	43	26	17
		Column N %	12%	13%	12%
	Total	Count	349	199	146
		Column N %			

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

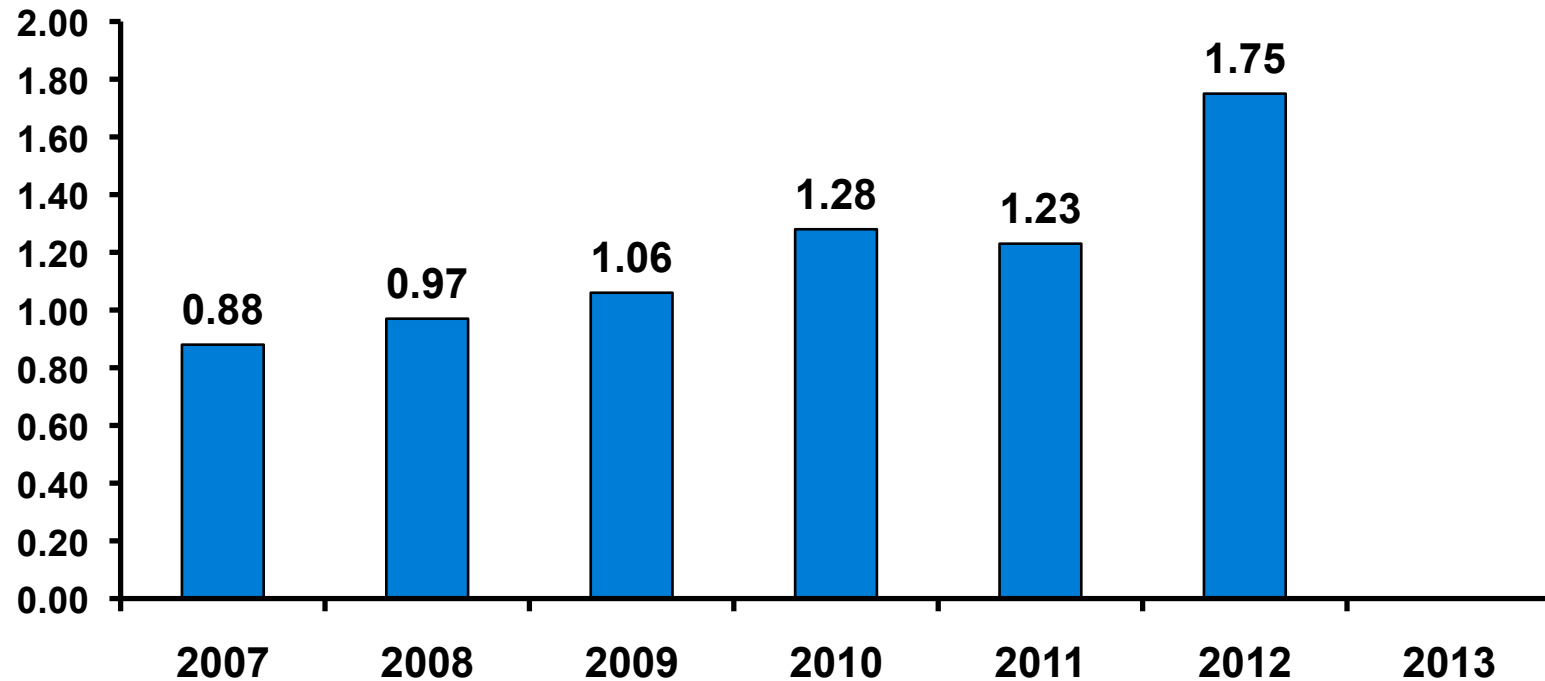
Repeat Visitors Last Trip

n = 141



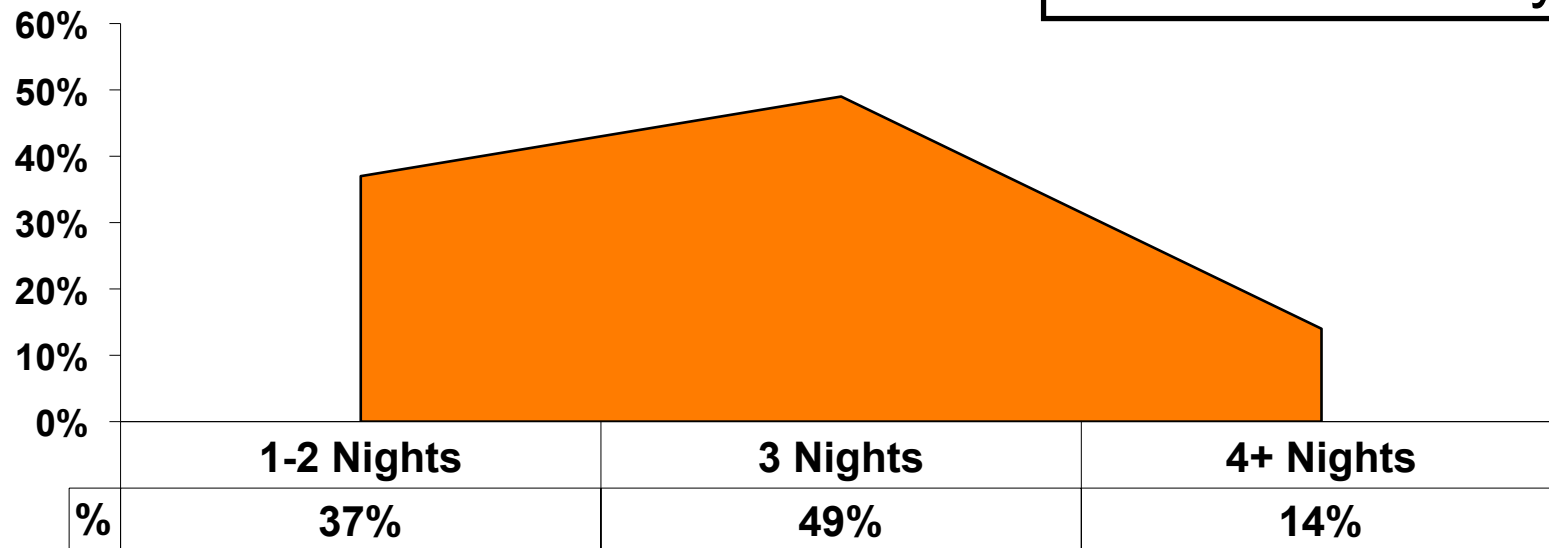
- The average repeat visitor has been to Guam 2.64 times.
- A little less than half the repeat visitors have been to Guam within the last 2 years.

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

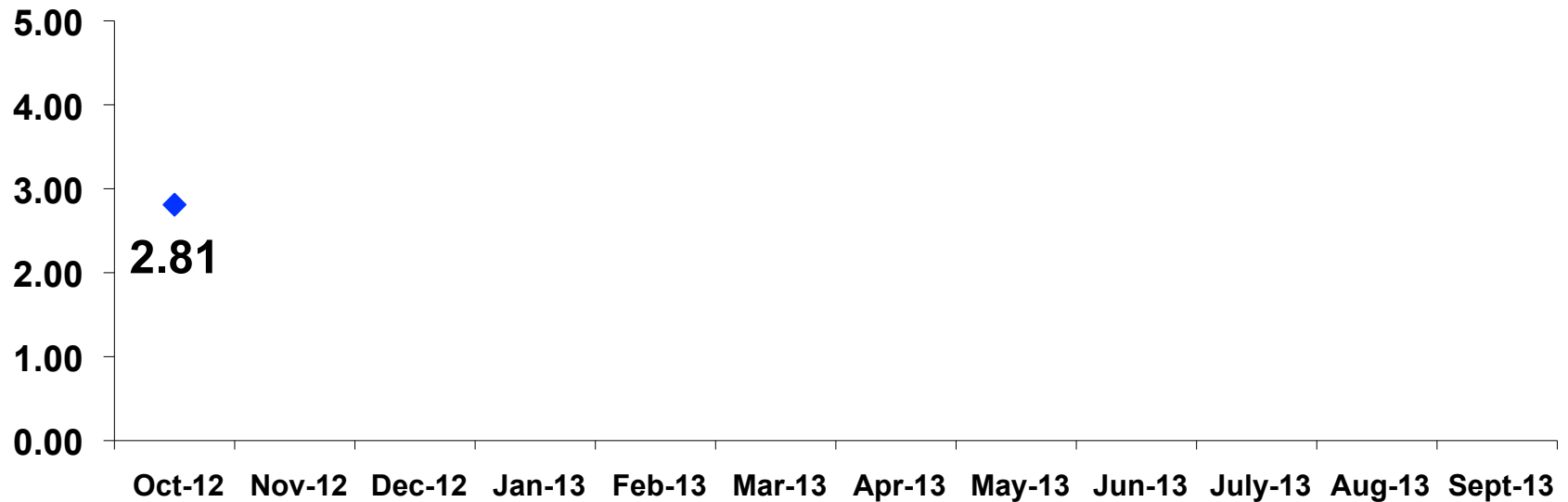


Length of Stay

Mean = 2.81 Days
Median = 3.0 Days



Average Length of Stay

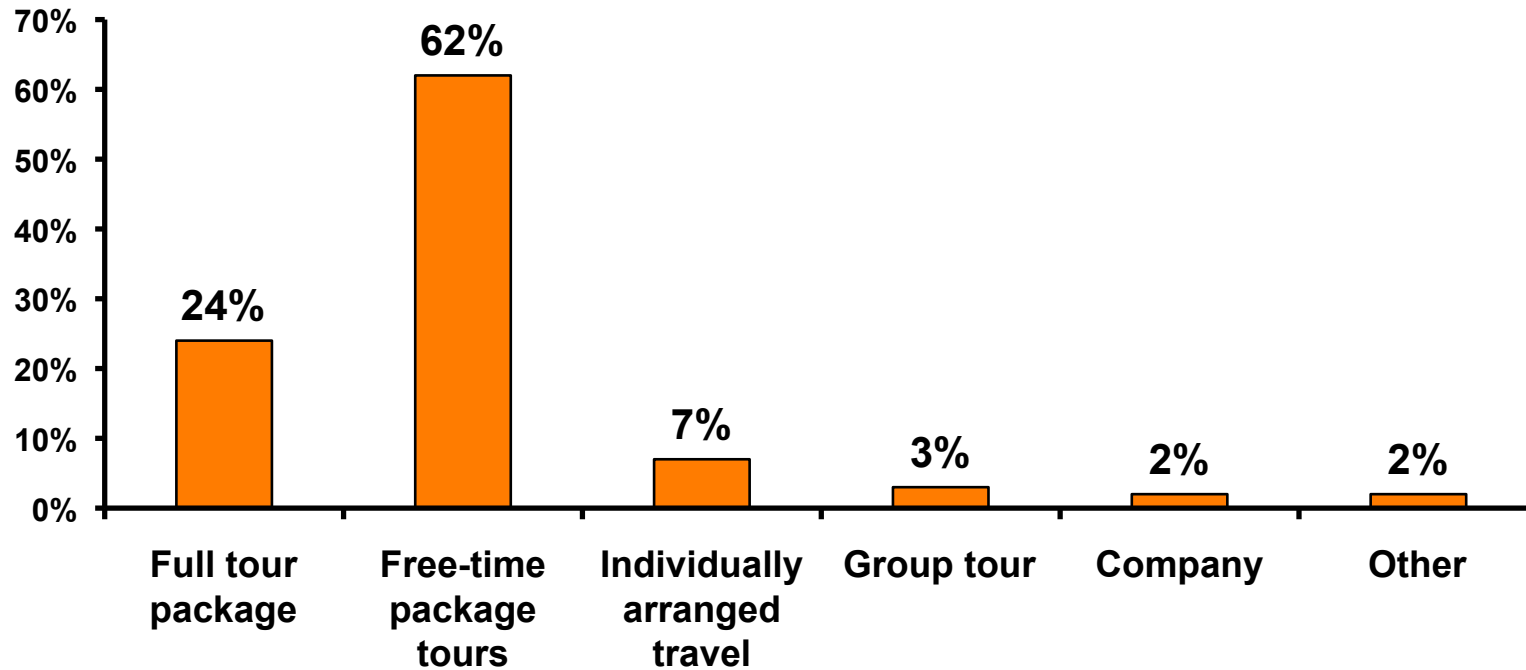


Occupation by Income

		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	21%	16%	34%	28%	27%	23%	19%	7%	67%
	Engineer	16%	21%	27%	17%	10%	23%	19%	7%	
	Student	13%	42%	7%	2%	7%	6%	10%	18%	
	Salesperson	10%	5%	5%	6%	12%	16%	14%	9%	
	Homemaker	6%			6%	7%	10%	7%	7%	
	Manager	6%		2%	2%	2%	5%	12%	14%	
	Professional/ Specialist	5%	5%	2%	8%	10%		5%	9%	
	Self-employed	4%	5%	2%	4%	5%	2%	5%	11%	
	Skilled worker	4%		9%	6%	5%	5%		2%	
	Govt- office worker non-mgr	3%		2%	6%	7%	3%		2%	
	Freeter	3%	5%	2%	6%		2%		2%	
	Other	2%		2%	4%	2%	2%	2%	2%	
	Unemployed	2%		2%	4%	5%			2%	
	Executive (30+ employees)	2%		2%	2%		2%	2%	5%	
	Govt- Manager	1%					3%	5%		
	Teacher	1%			2%				2%	
	Total Count	341	19	44	53	41	62	42	44	6

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

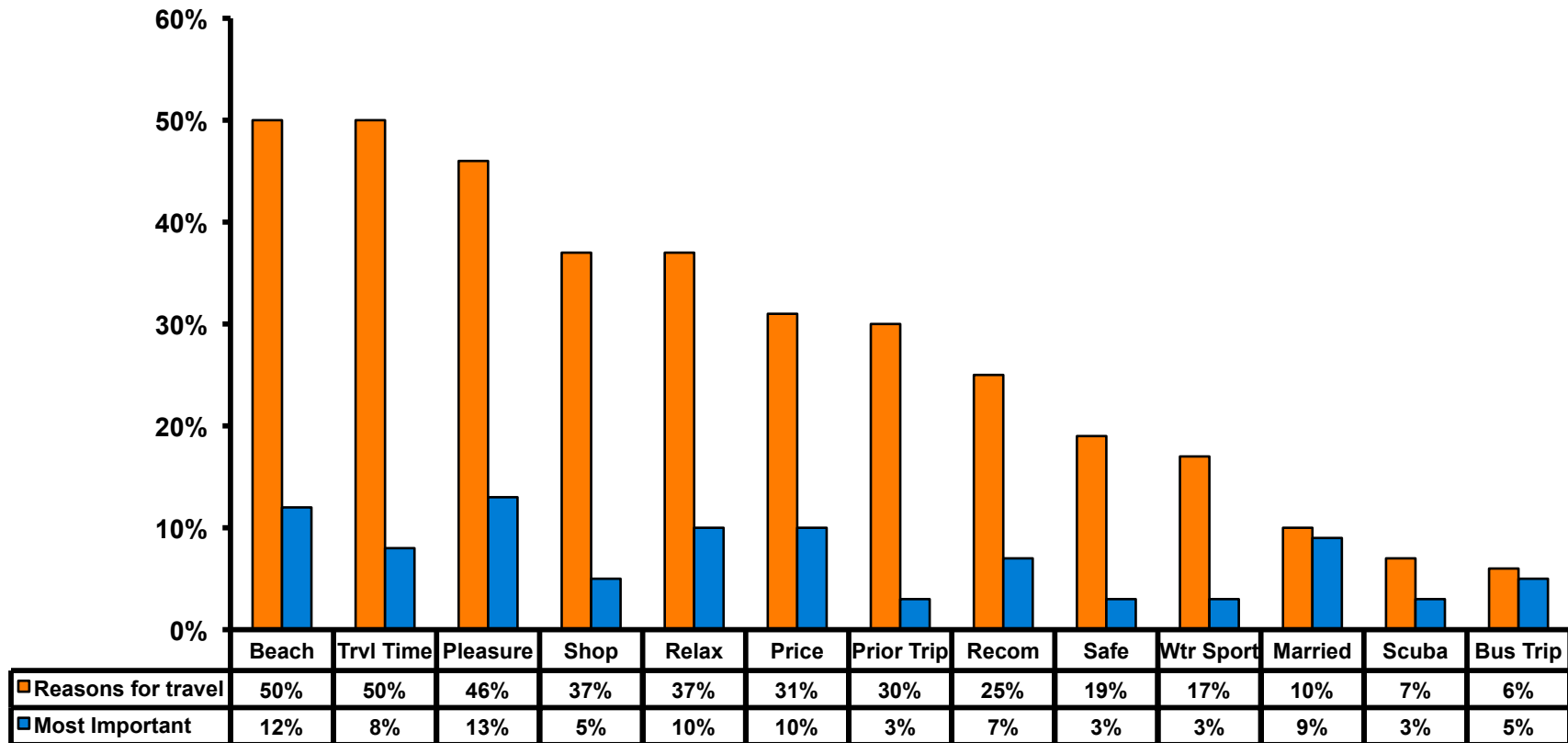


Accommodation by Income

Average length of stay: 2.81 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	25%	11%	33%	34%	29%	23%	14%	20%	33%	
Hotel Nikko Guam	9%	5%	16%	11%		8%	12%	7%		
Grand Plaza Hotel	8%	11%	12%	15%	5%	8%		5%		
Outrigger Guam Resort	6%		2%	4%	7%	13%	10%	2%		
Fiesta Resort Guam	5%	5%	2%	6%	10%	10%		5%		
Hilton Guam Resort	5%	11%	2%	4%	5%	3%	5%	7%	17%	
Oceanview Hotel	5%	26%	7%		5%	3%	2%	7%	17%	
Royal Orchid Guam	4%	11%	5%	4%	5%	3%	7%	2%	17%	
Onward Beach Resort	3%		5%		2%	8%	10%			
Hotel Santa Fe	3%		2%	6%	10%	2%	2%	2%		
Pacific Bay Hotel	3%	5%	2%	2%		2%	7%	2%	17%	
Guam Reef Hotel	3%			4%	2%	2%	2%	7%		
PIC Club	3%			2%	2%	3%	7%	7%		
Sheraton Laguna Guam	3%				2%	3%	5%	7%		
Hyatt Regency Guam	3%		2%	2%	7%		5%	5%		
Leo Palace Resort	3%		2%		5%	2%	5%	7%		
Bayview Hotel	2%	11%	5%			3%				
Holiday Resort Guam	2%		2%	2%	2%	2%		2%		
Westin Resort Guam	1%			2%		2%	2%	2%		
Tumon Bay Capital Hotel	1%			4%			2%	2%		
Other	1%					2%				
Guam Marriott Resort	1%	5%						2%		
Ramada Suites Guam	0%						2%			
Total	Count	350	19	43	53	41	62	42	44	6

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Pleasure,
- Guam's natural beauty/ beaches,
- Price/ To relax

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	50%	59%	51%	44%	37%	43%	57%
	Short travel time	50%	46%	49%	57%	47%	47%	53%
	Pleasure	46%	49%	49%	42%	37%	37%	55%
	Shopping	37%	40%	37%	38%	28%	27%	47%
	Relax	37%	34%	35%	42%	42%	38%	36%
	Price	31%	41%	29%	23%	28%	29%	33%
	Previous trip	30%	20%	32%	40%	28%	32%	29%
	Recomm- friend/family/trvl agnt	25%	33%	27%	17%	16%	20%	30%
	Safe	19%	17%	18%	21%	23%	18%	20%
	Water sports	17%	29%	16%	10%	5%	12%	22%
	Married/ Attn wedding	10%		13%	12%	16%	11%	8%
	Scuba	7%	10%	8%	5%	5%	8%	7%
	Company/ Business Trip	6%	4%	4%	9%	12%	8%	4%
	Honeymoon	5%	3%	8%	3%	2%	7%	3%
	Other	2%		1%	5%	7%	3%	1%
	Visit friends/ Relatives	2%	3%	1%	3%	2%	3%	1%
	Company Sponsored	2%	2%	2%	1%		2%	1%
	Organized sports	1%		2%		2%	2%	1%
	Career Cert/ Testing	1%	2%			2%	1%	1%
	Golf	1%		1%	1%		1%	1%
	Total Count	351	93	136	77	43	177	174

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	50%	68%	43%	62%	54%	37%	52%	59%	33%	
	Short travel time	50%	42%	39%	58%	46%	52%	55%	61%	33%	
	Pleasure	46%	37%	43%	53%	56%	45%	48%	48%	33%	
	Shopping	37%	21%	45%	36%	39%	42%	40%	34%	33%	
	Relax	37%	21%	27%	43%	54%	31%	38%	41%	33%	
	Price	31%	21%	34%	30%	39%	29%	26%	32%	33%	
	Previous trip	30%	42%	20%	23%	27%	47%	31%	34%	17%	
	Recomm- friend/family/trvl agnt	25%	37%	20%	25%	29%	24%	29%	20%	17%	
	Safe	19%	16%	14%	19%	12%	21%	24%	23%	17%	
	Water sports	17%	16%	25%	17%	22%	10%	19%	20%	17%	
	Married/ Attn wedding	10%		18%	9%		8%	19%	11%		
	Scuba	7%	11%	2%	9%	10%	6%		16%		
	Company/ Business Trip	6%	21%	9%	4%		5%	10%	2%		
	Honeymoon	5%		2%	9%	7%	5%	2%	2%		
	Other	2%		2%	2%		2%	7%			
	Visit friends/ Relatives	2%	11%		2%	5%		5%	2%		
	Company Sponsored	2%	5%	5%			2%		2%		
	Organized sports	1%			2%	2%			5%		
	Career Cert/ Testing	1%							5%		
	Golf	1%				2%	2%		2%		
	Total	Count	351	19	44	53	41	62	42	44	6

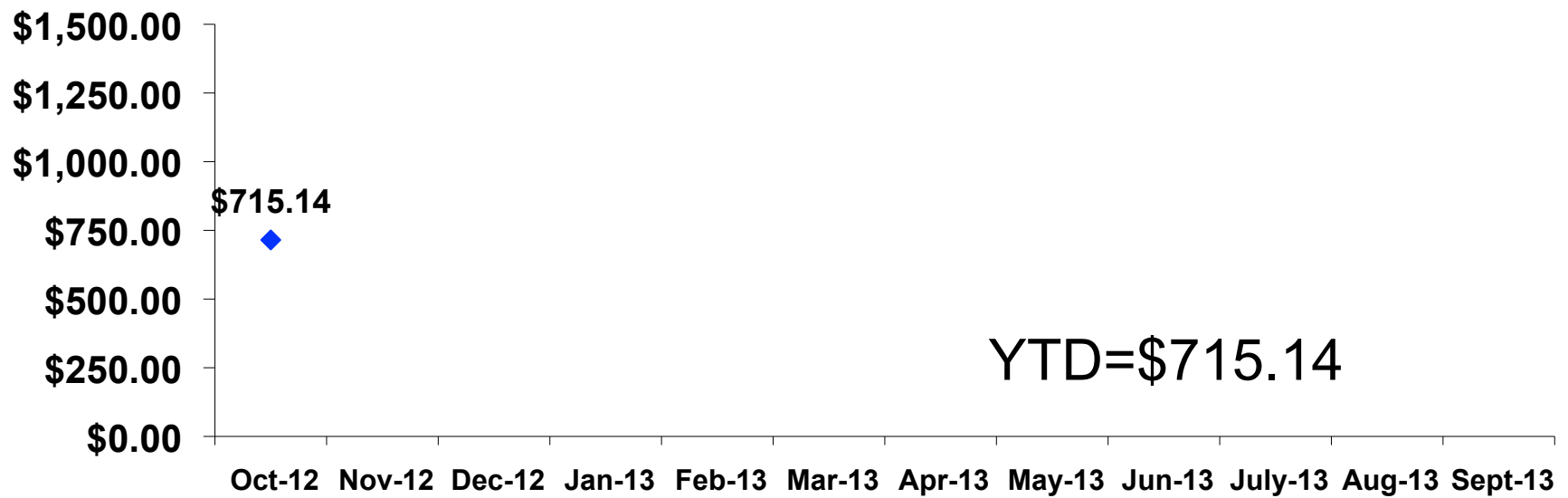
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥79.60/US\$1

- \$1,437.09 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$25,126 = maximum (highest amount recorded for the entire sample)
- \$715.14 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

¥79.60=\$1

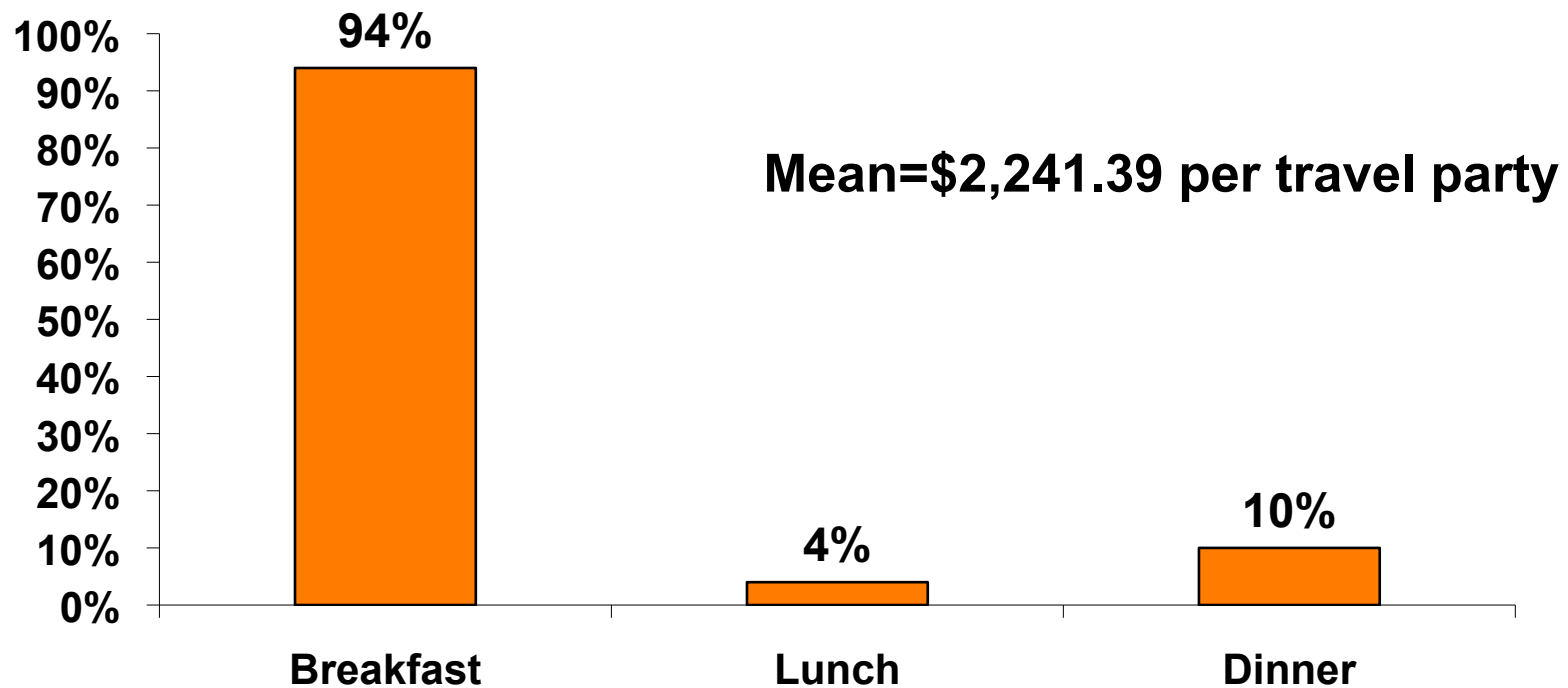
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,409.17
Air & Accommodation w/ daily meal package	\$2,241.39
Air only	\$333.97
Accommodation only	\$-
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$36.43
Ground transportation- Japan	\$85.49
Ground transportation- Guam	\$38.43
Optional tours/ activities	\$322.77
Other expenses	\$451.53
Total Prepaid	\$1,437.09

Prepaid Meal Breakdown

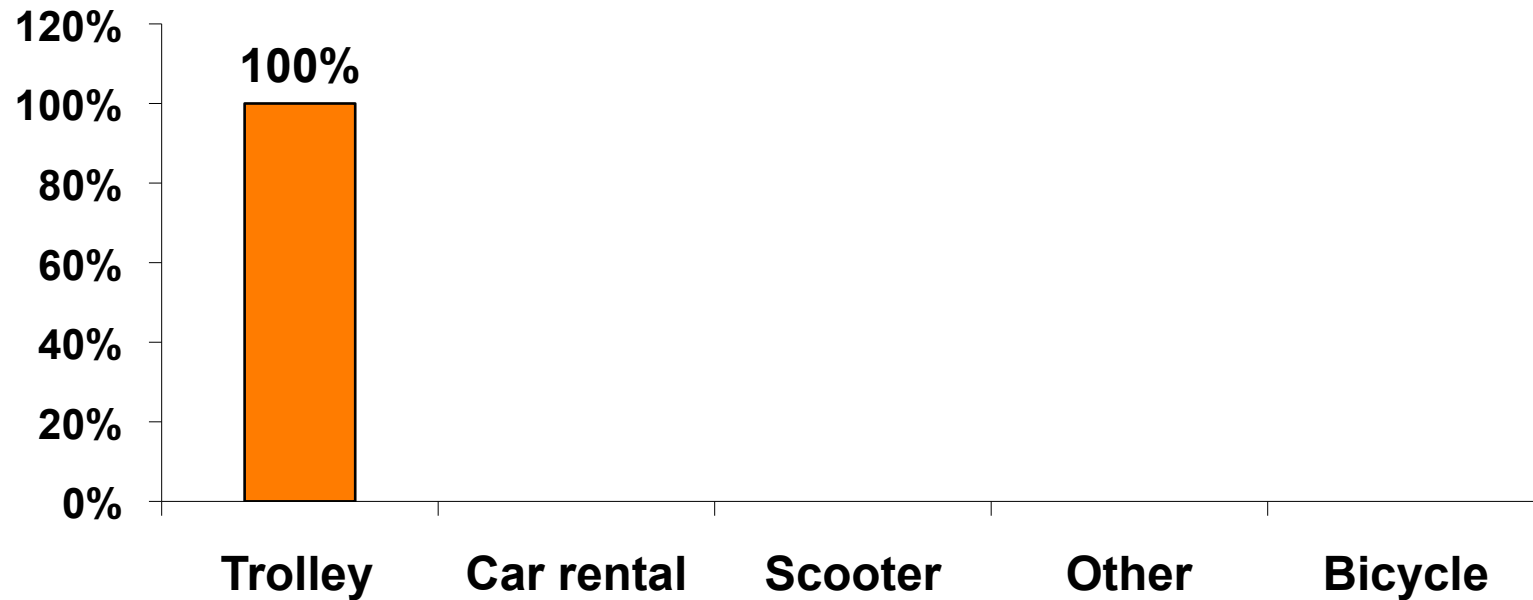
Air/ Accommodations with Daily Meal Package

n=67



Prepaid Ground Transportation

n=8

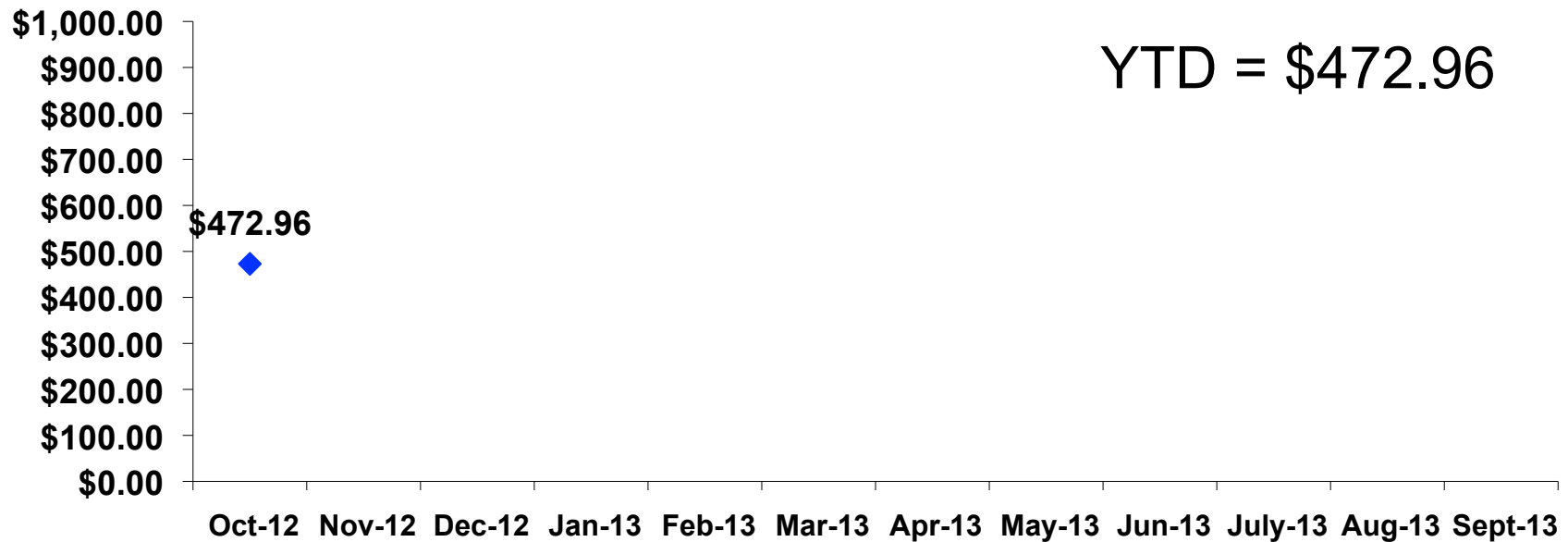


Mean=\$38.43 per travel party

On-Island Expenditures

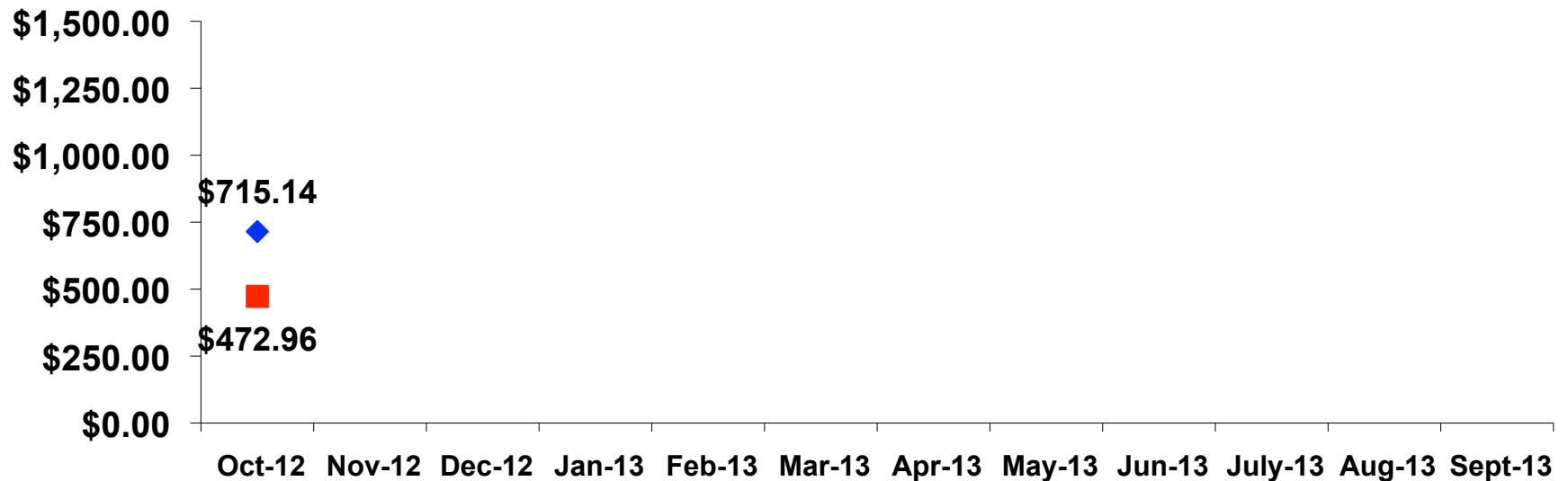
- \$683.69 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,176 = Maximum (highest amount recorded for the entire sample)
- \$472.96 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person



Prepaid / On-Island Expenditure Per Person

Prepaid YTD = \$715.14 On-Island YTD = \$472.96



◆ Prepaid ■ On-isle

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	\$472.96	\$469.35	\$476.63	\$355.82	\$484.46	\$608.72	\$334.38	\$503.61	\$512.17	\$410.37	\$324.78
	Median	\$350	\$309	\$371	\$317	\$330	\$400	\$250	\$400	\$386	\$350	\$265
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,000	\$5,000	\$4,163	\$920	\$3,000	\$5,000	\$1,800	\$2,140	\$4,163	\$1,700	\$1,000

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$30.95	\$41.51	\$20.20	\$13.31	\$34.93	\$47.71	\$25.58
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$26.97	\$31.75	\$22.11	\$16.73	\$23.86	\$50.22	\$18.60
	Median	\$5	\$0	\$6	\$0	\$5	\$20	\$0
F&B RESTRNT	Mean	\$61.90	\$71.01	\$52.64	\$36.55	\$60.27	\$90.86	\$70.58
	Median	\$0	\$0	\$0	\$0	\$20	\$21	\$0
OPT TOUR	Mean	\$58.47	\$63.62	\$53.23	\$46.59	\$57.15	\$89.66	\$34.02
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$237.70	\$241.26	\$234.07	\$140.11	\$273.20	\$338.78	\$166.51
	Median	\$50	\$20	\$67	\$0	\$50	\$100	\$30
GIFT- OTHER	Mean	\$122.83	\$121.08	\$124.62	\$109.41	\$128.18	\$136.40	\$114.98
	Median	\$50	\$40	\$60	\$40	\$60	\$70	\$25
TRANS	Mean	\$10.63	\$13.73	\$7.46	\$6.95	\$9.46	\$17.01	\$11.35
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$140.95	\$175.81	\$105.49	\$158.26	\$142.37	\$145.32	\$87.33
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$683.69	\$752.54	\$613.66	\$532.20	\$716.40	\$904.81	\$526.28
	Median	\$500	\$500	\$421	\$400	\$500	\$600	\$400

On-Island Expenditures

First Timers & Repeaters

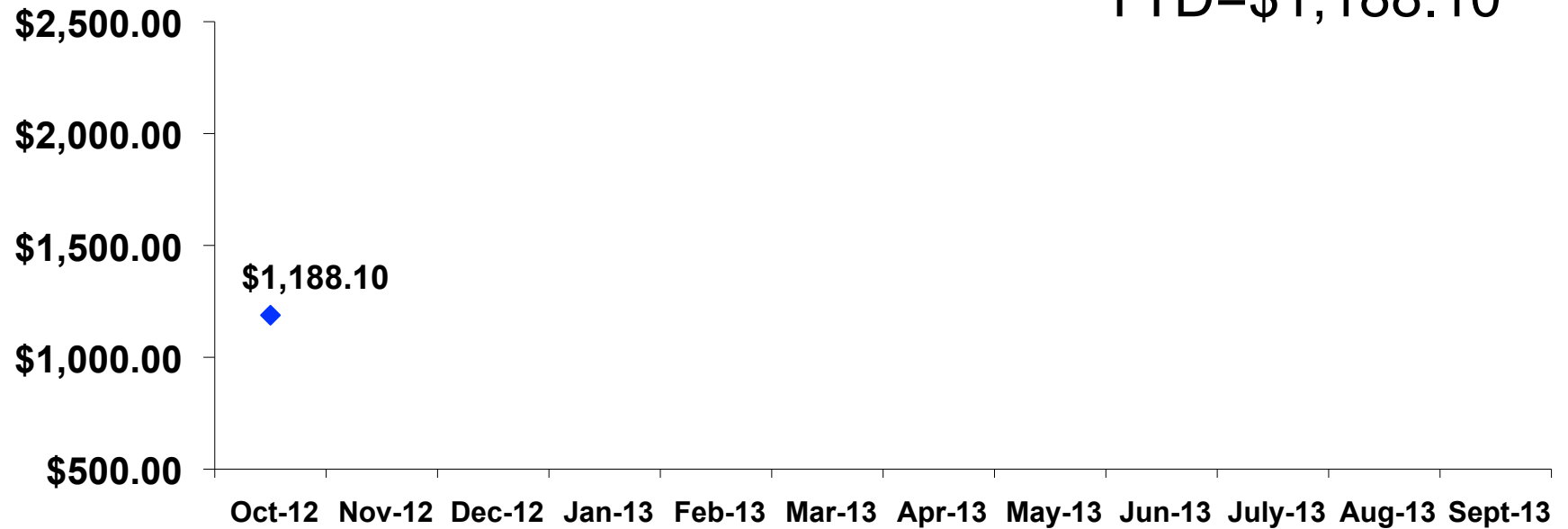
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$30.95	\$26.40	\$37.97
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$26.97	\$23.63	\$31.88
	Median	\$5	\$0	\$10
F&B RESTRNT	Mean	\$61.90	\$49.32	\$79.35
	Median	\$0	\$0	\$35
OPT TOUR	Mean	\$58.47	\$56.97	\$62.10
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$237.70	\$179.19	\$321.38
	Median	\$50	\$20	\$100
GIFT- OTHER	Mean	\$122.83	\$117.22	\$133.43
	Median	\$50	\$40	\$60
TRANS	Mean	\$10.63	\$7.91	\$14.32
	Median	\$0	\$0	\$0
OTHER	Mean	\$140.95	\$148.26	\$126.69
	Median	\$0	\$0	\$0
TOTAL	Mean	\$683.69	\$610.04	\$789.54
	Median	\$500	\$400	\$550

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,188.10 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,503 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

YTD=\$1,188.10

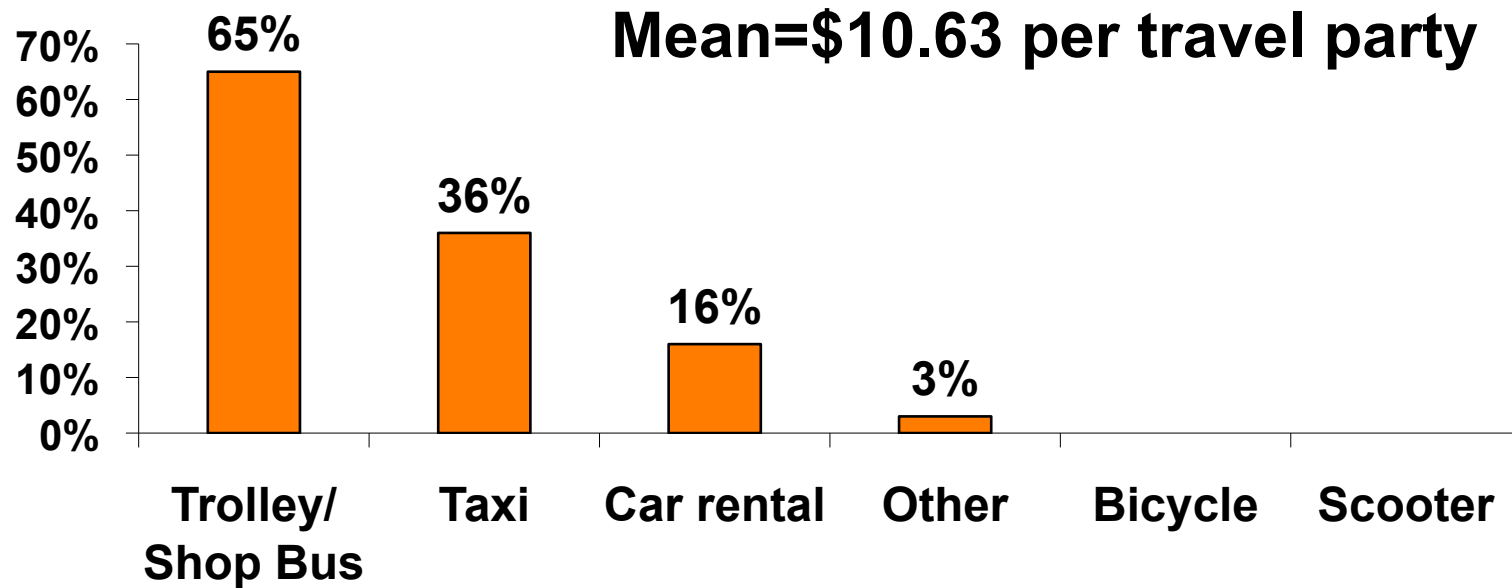


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$30.95
Food & beverage in fast food restaurant/ convenience store	\$26.97
Food & beverage at restaurants or drinking establishments outside a hotel	\$61.90
Optional tours and activities	\$58.47
Gifts/ souvenirs for yourself/companions	\$237.70
Gifts/ souvenirs for friends/family at home	\$122.83
Local transportation	\$10.63
Other expenses not covered	\$140.95
Average Total	\$683.69

Local Transportation

n=69



Guam Airport Expenditures

- \$19.79 = Mean
- \$3 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$500 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

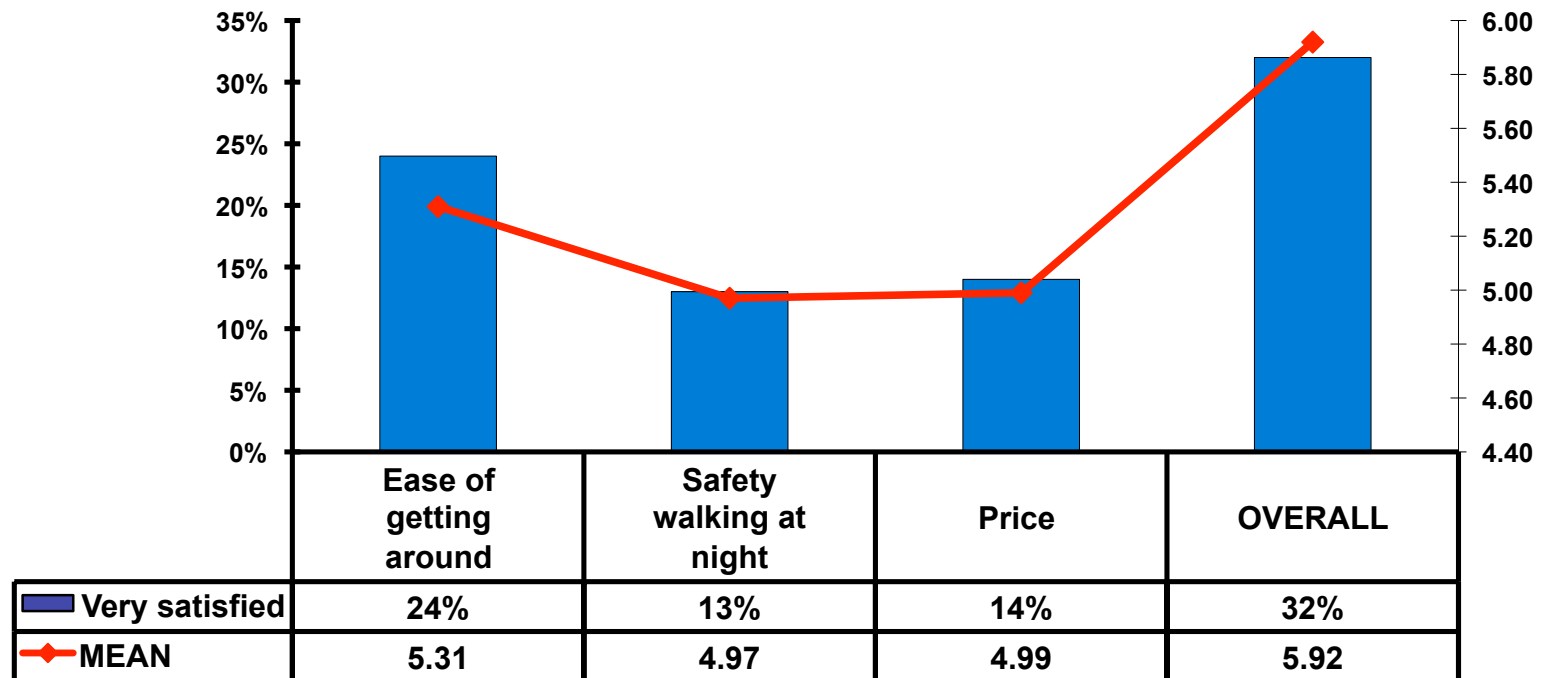
	MEAN \$
Food & Beverages	\$9.28
Gifts/Souvenirs Self	\$4.19
Gifts/Souvenirs Others	\$6.32
Total	\$19.79

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

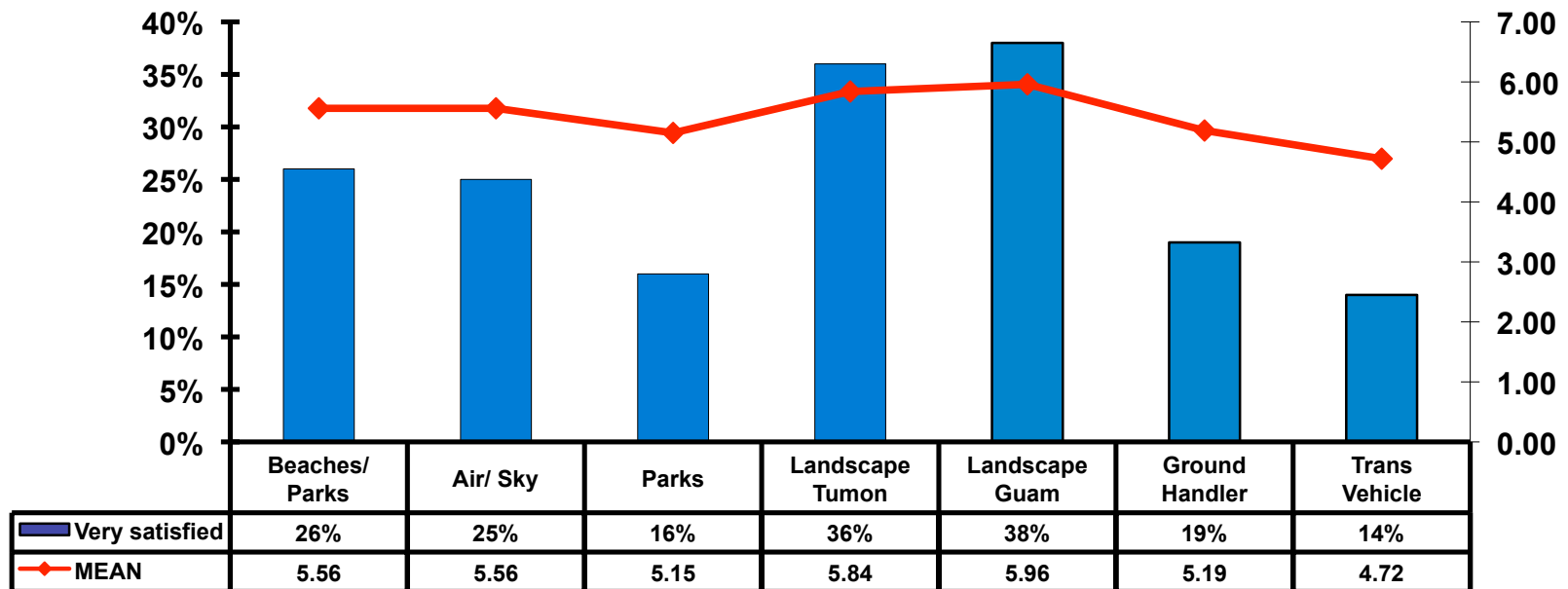
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

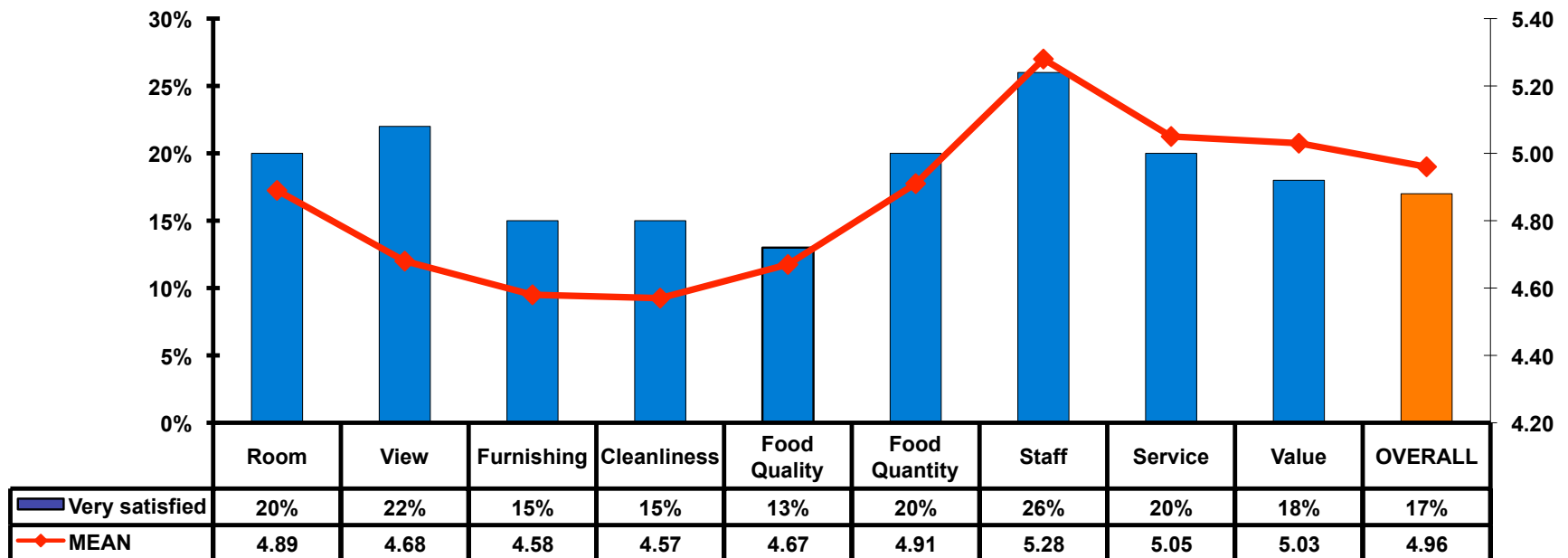
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

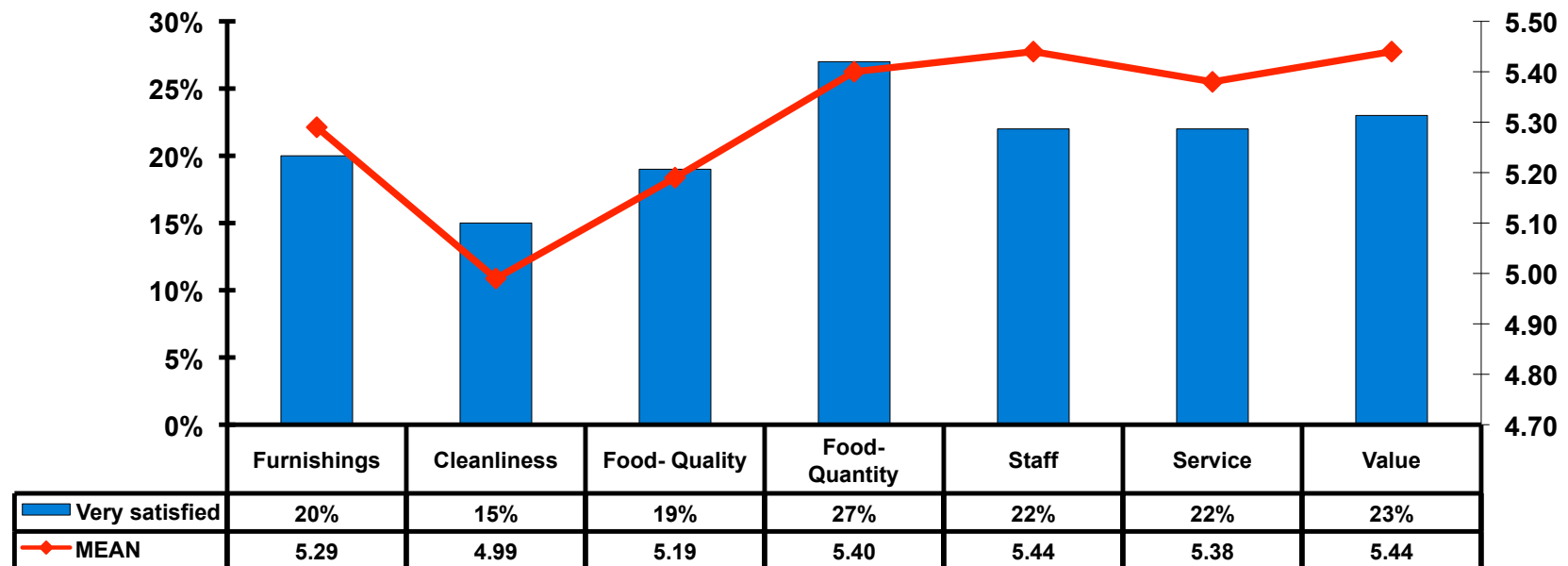
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

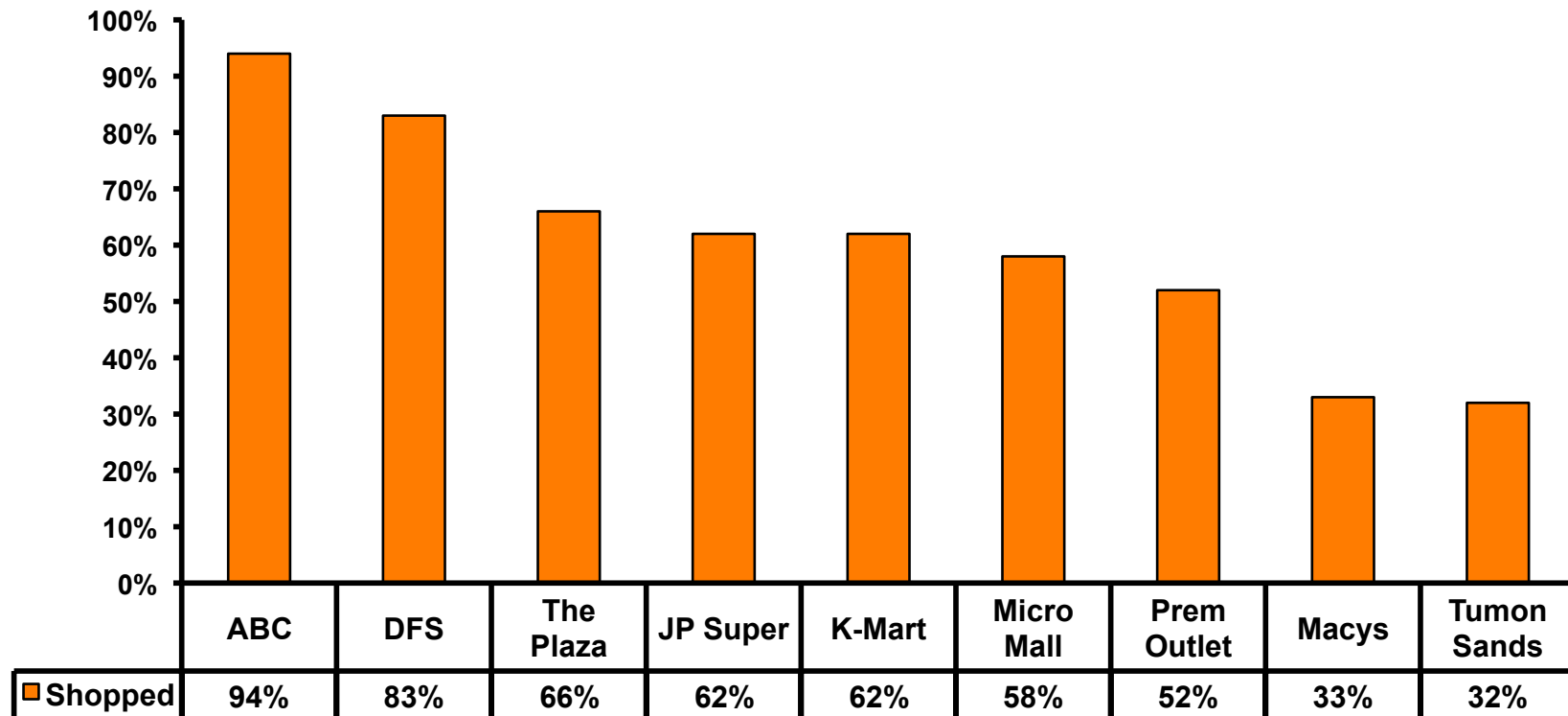
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

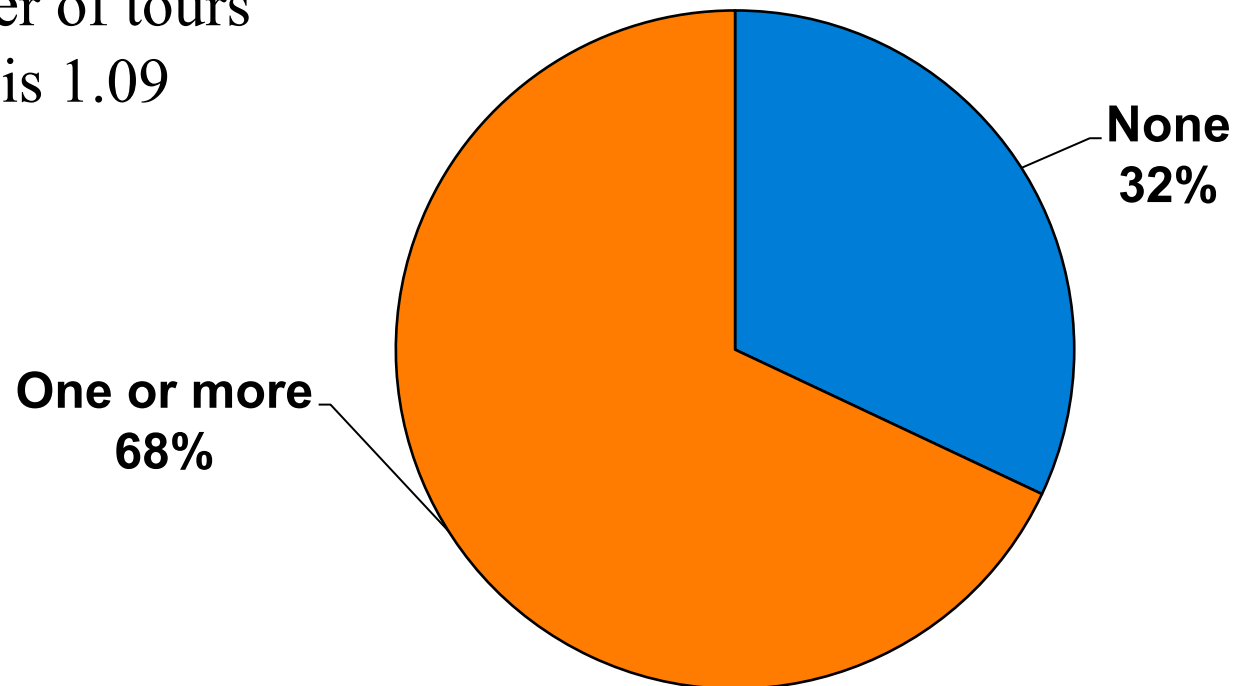
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

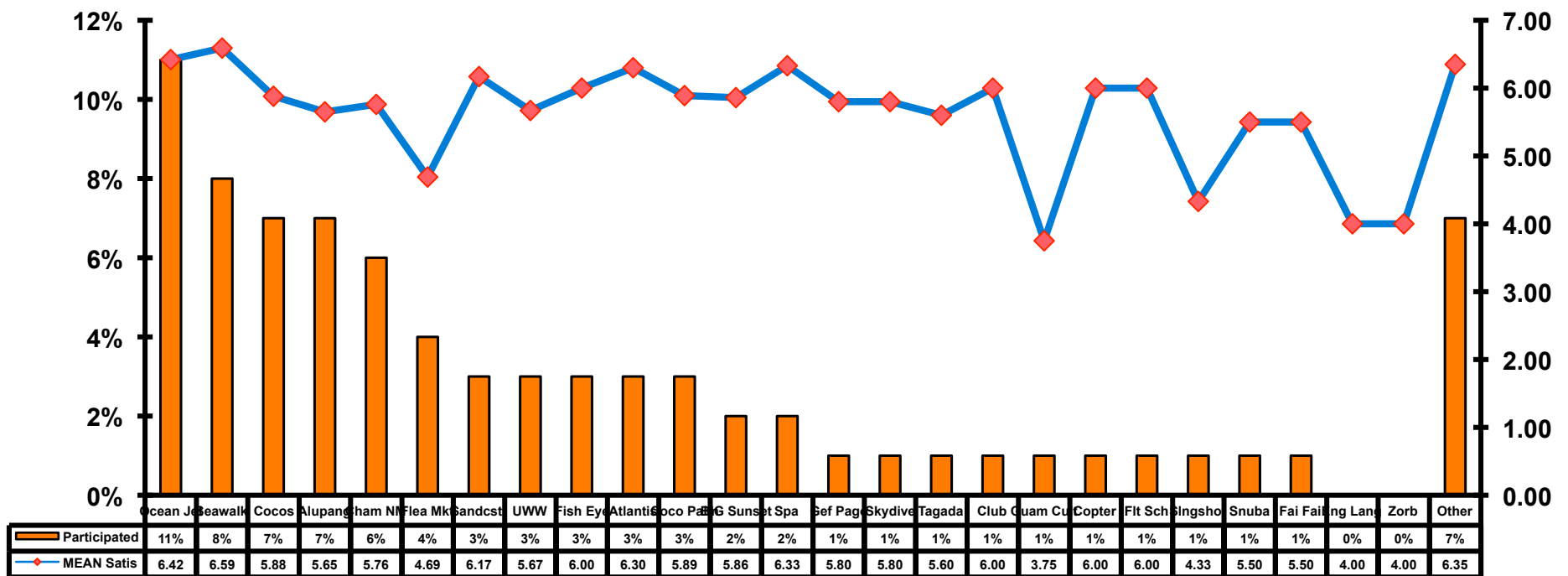
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 53%	Score of 6 to 7 = 49%
Score of 4 to 5 = 43%	Score of 4 to 5 = 43%
Score 1 to 3 = 5%	Score 1 to 3 = 8%
MEAN = 5.44	MEAN = 5.32

Optional Tour Participation

- Average number of tours participated in is 1.09



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 = 58%	Score of 6 to 7 = 53%
Score of 4 to 5 = 38%	Score of 4 to 5 = 45%
Score 1 to 3 = 4%	Score 1 to 3 = 2%
MEAN = 5.54	MEAN = 5.45

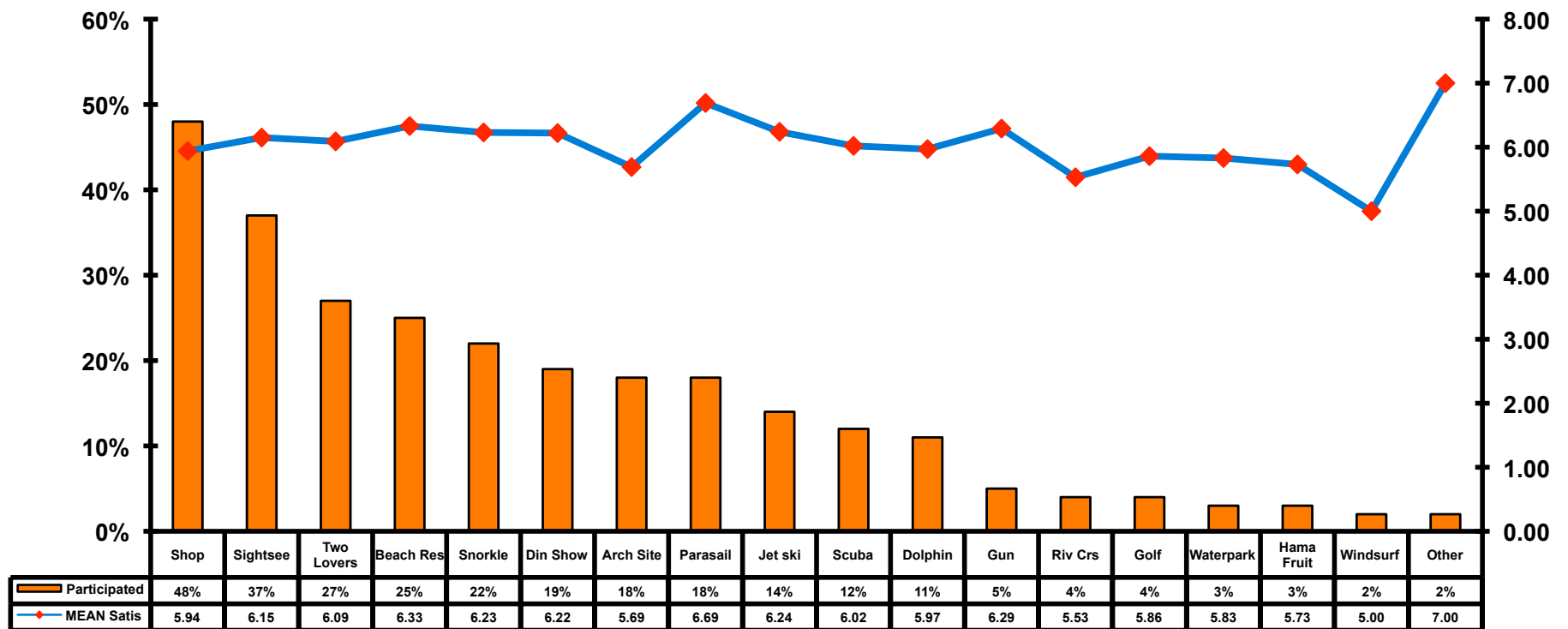
Night Tours Satisfaction

7pt Rating Scale

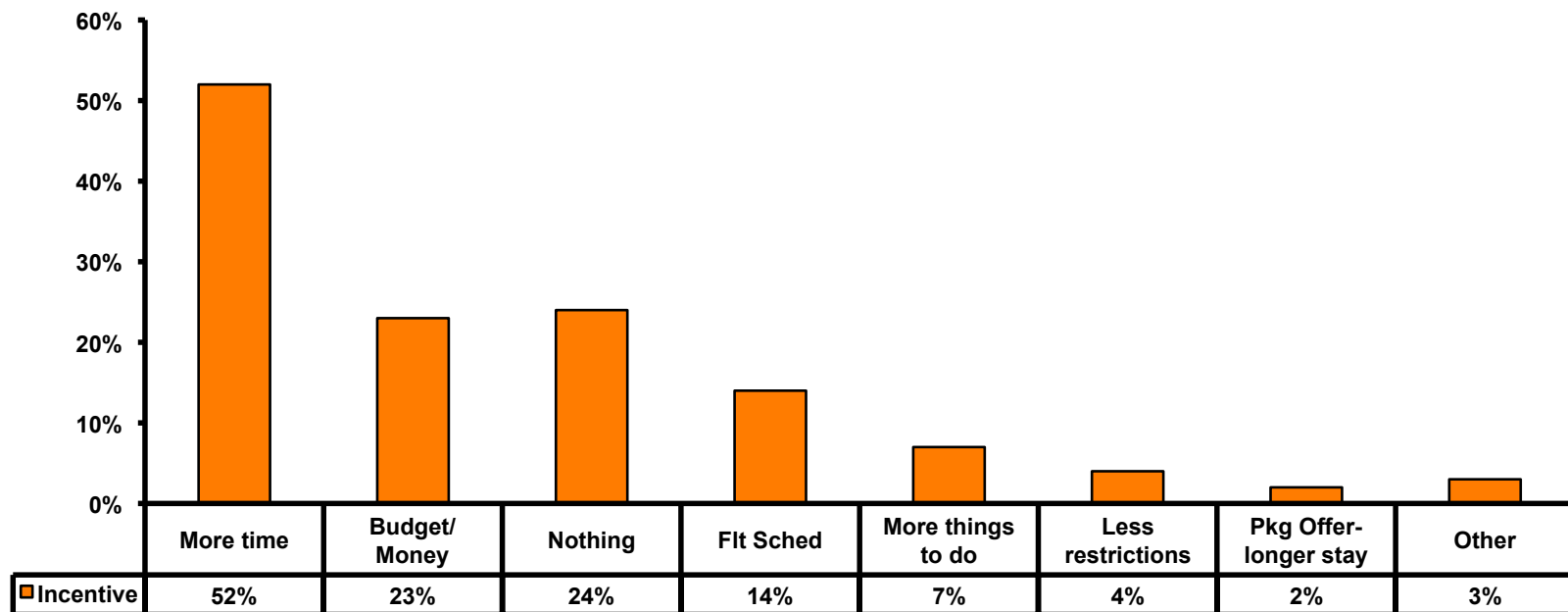
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 33%	Score of 6 to 7 = 32%
Score of 4 to 5 = 67%	Score of 4 to 5 = 66%
Score 1 to 3 = 1%	Score 1 to 3 = 2%
MEAN = 4.92	MEAN = 4.90

Satisfaction with Other Activities



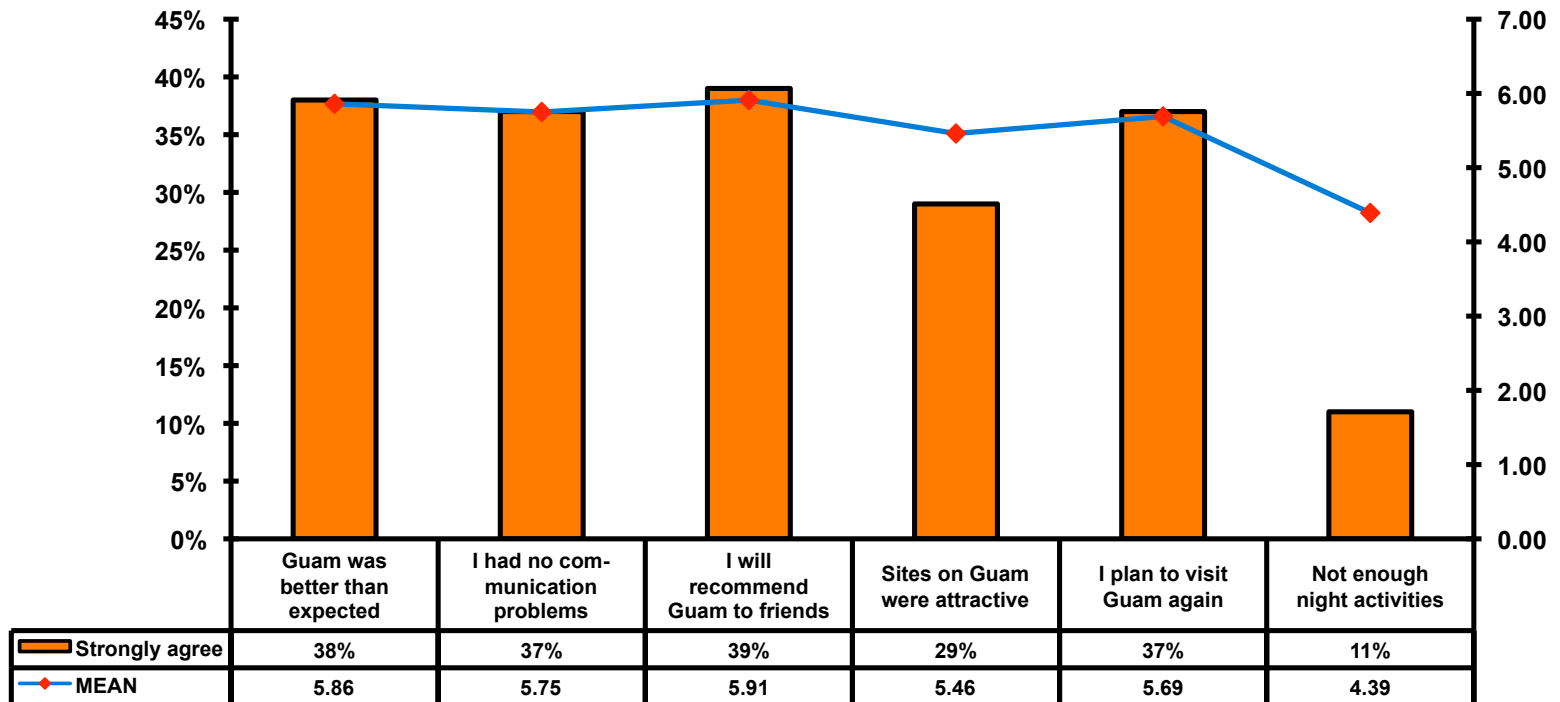
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

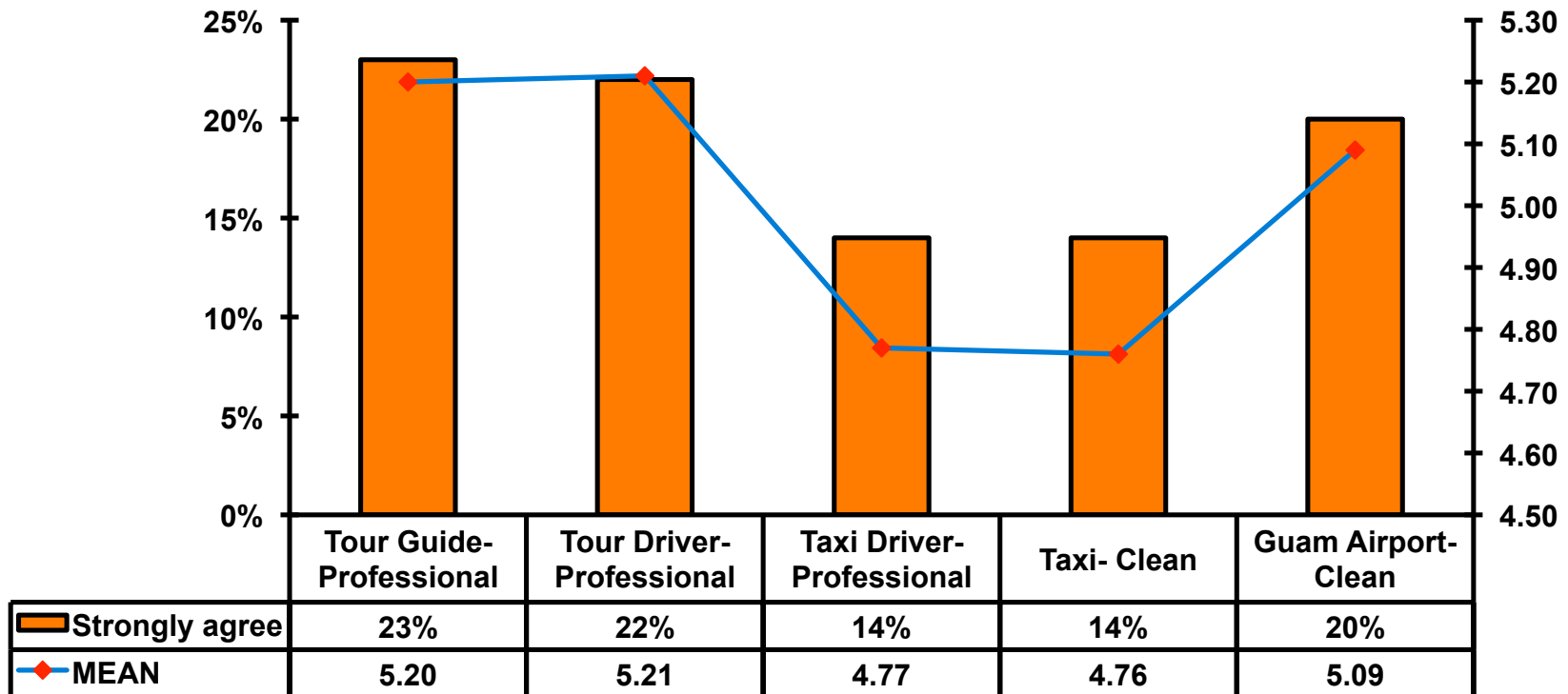
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

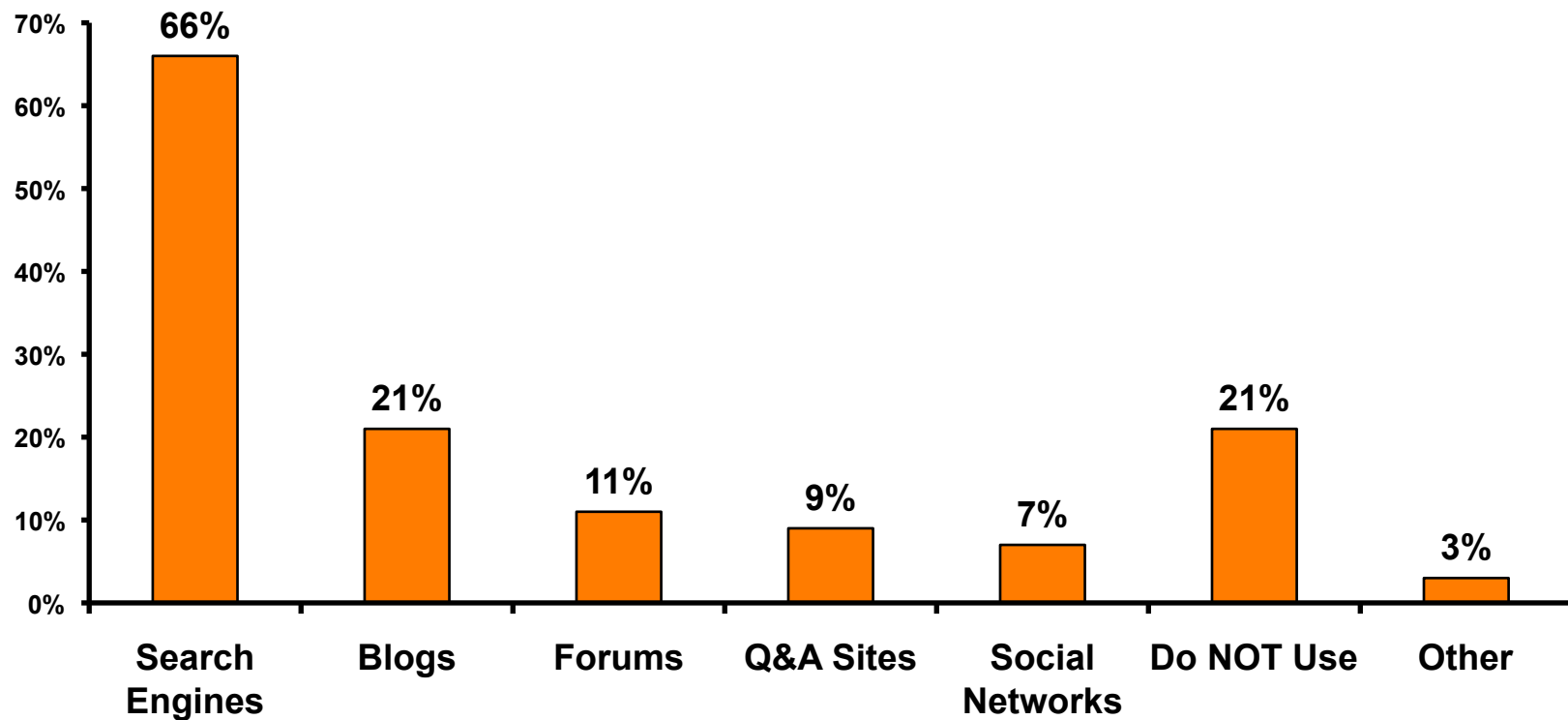
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



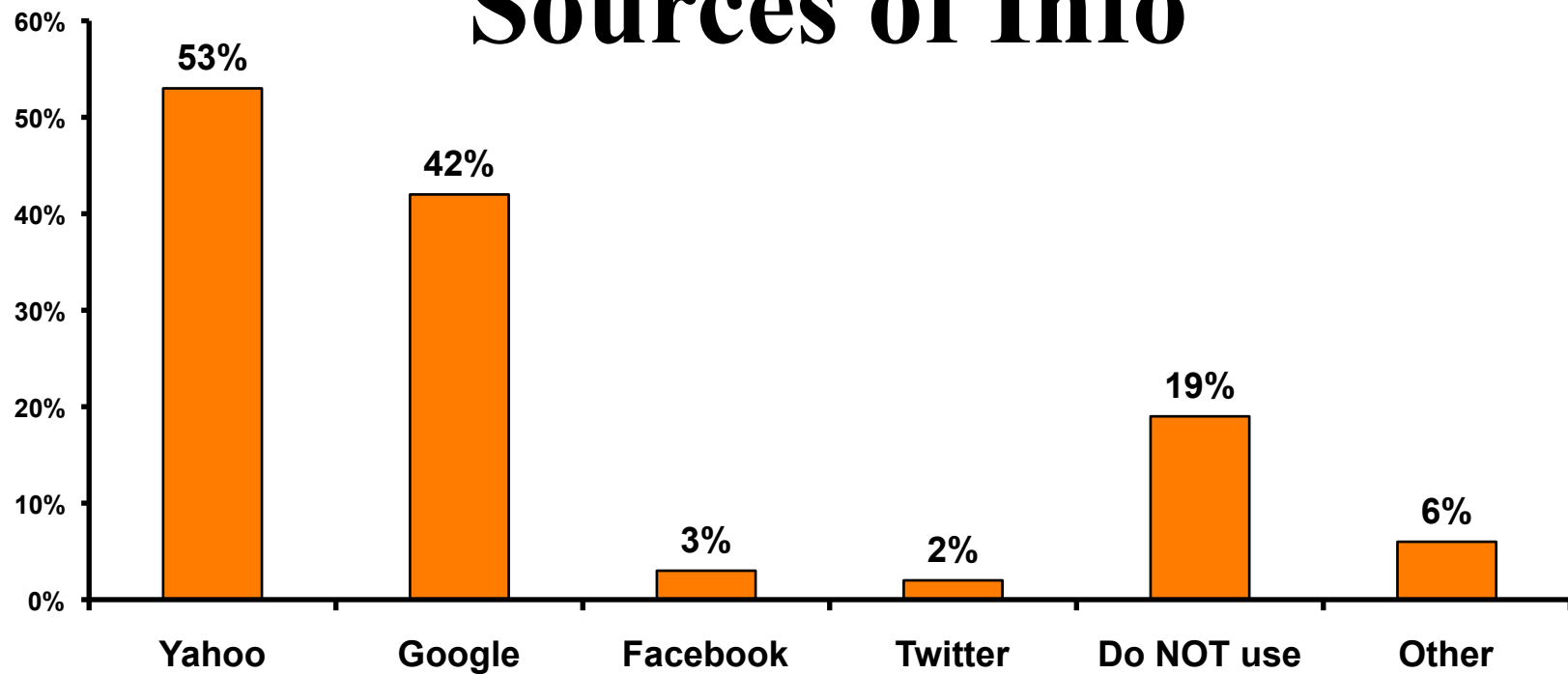
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

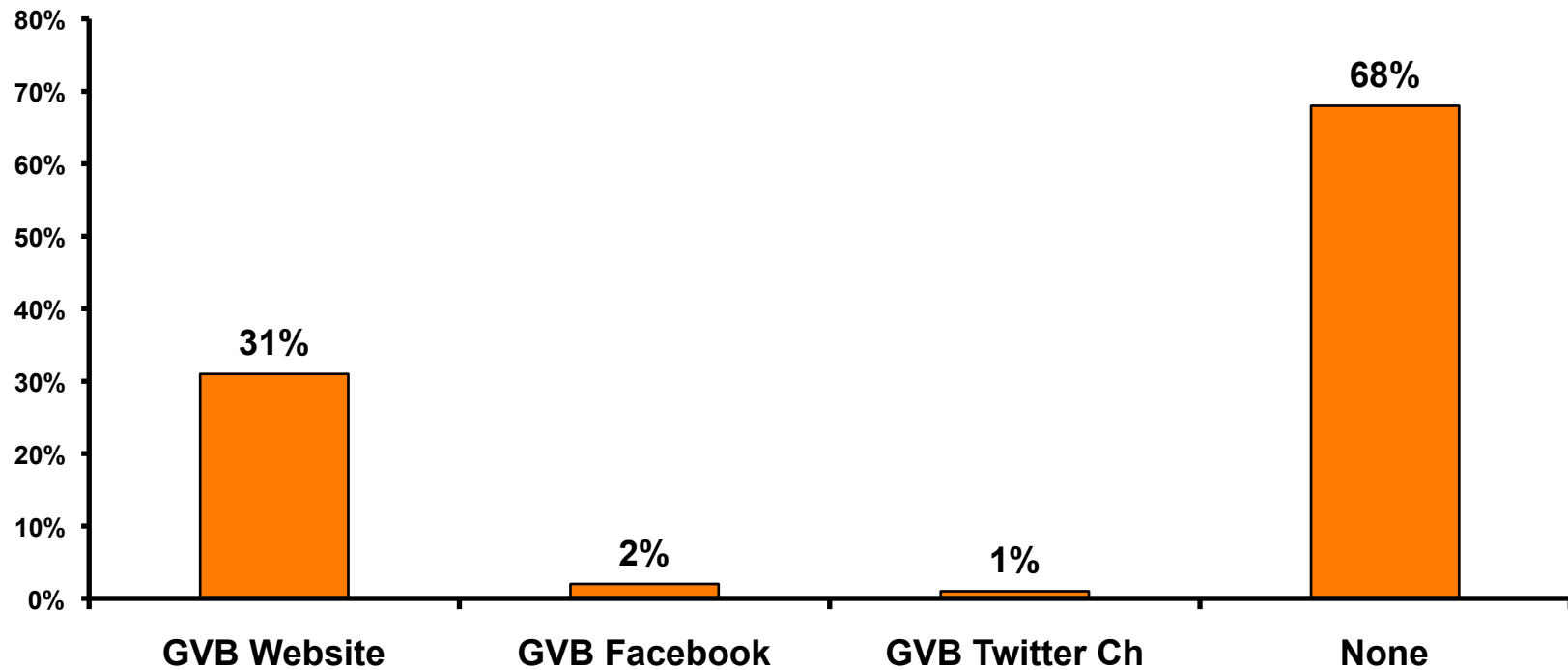


Internet- Things To Do

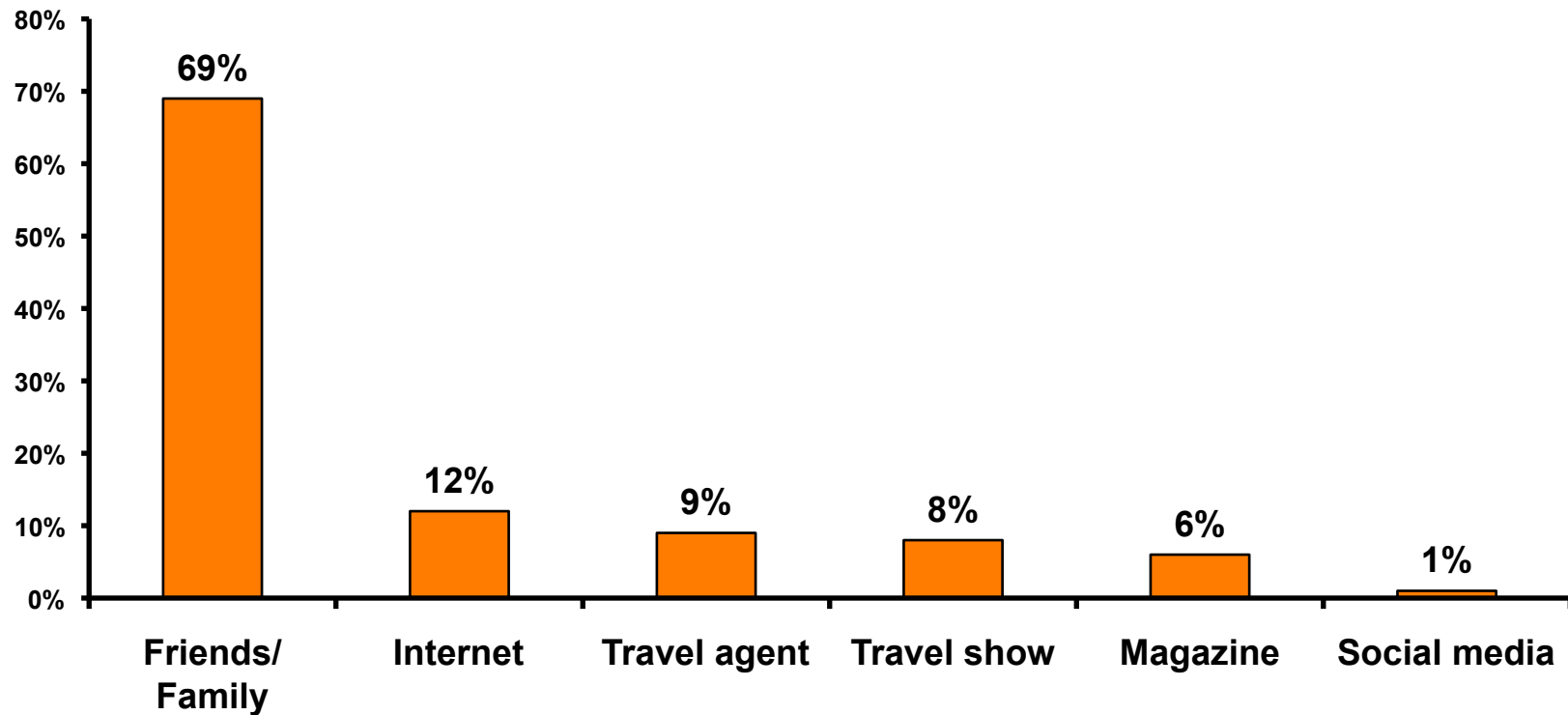
Sources of Info



Internet- GVB Sources

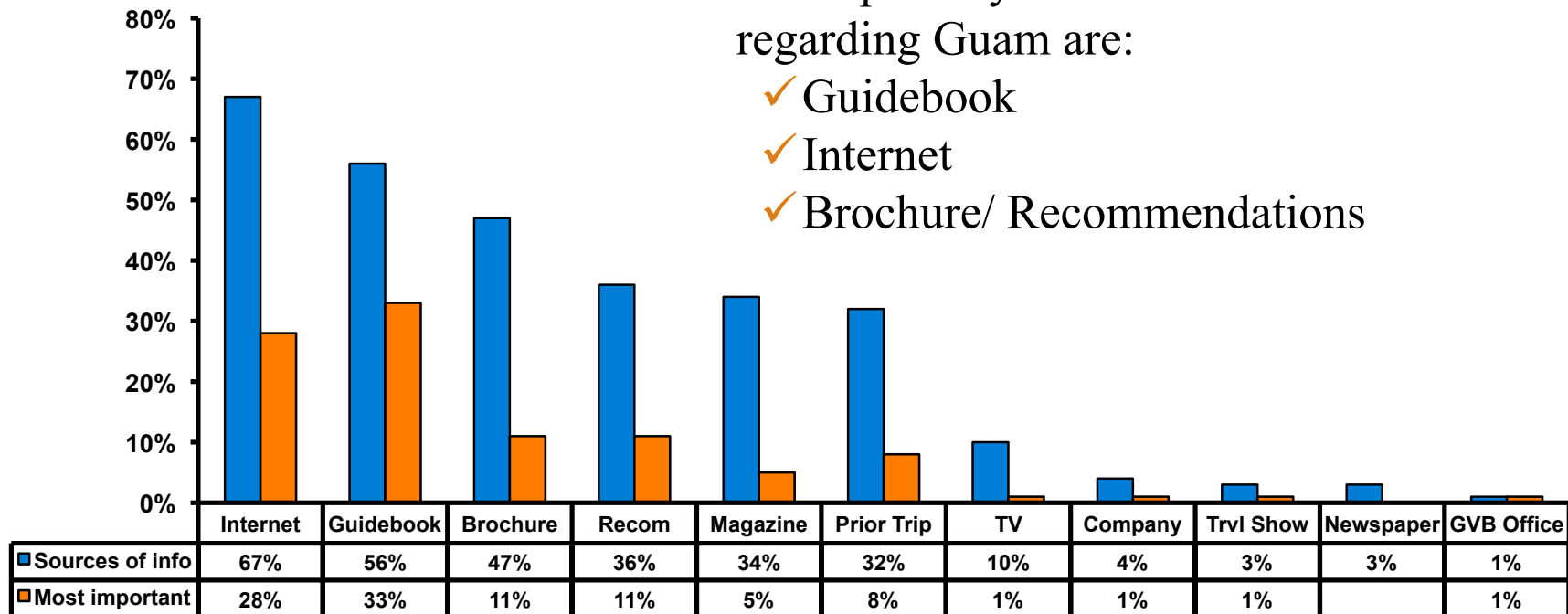


Travel Motivation- Info Sources



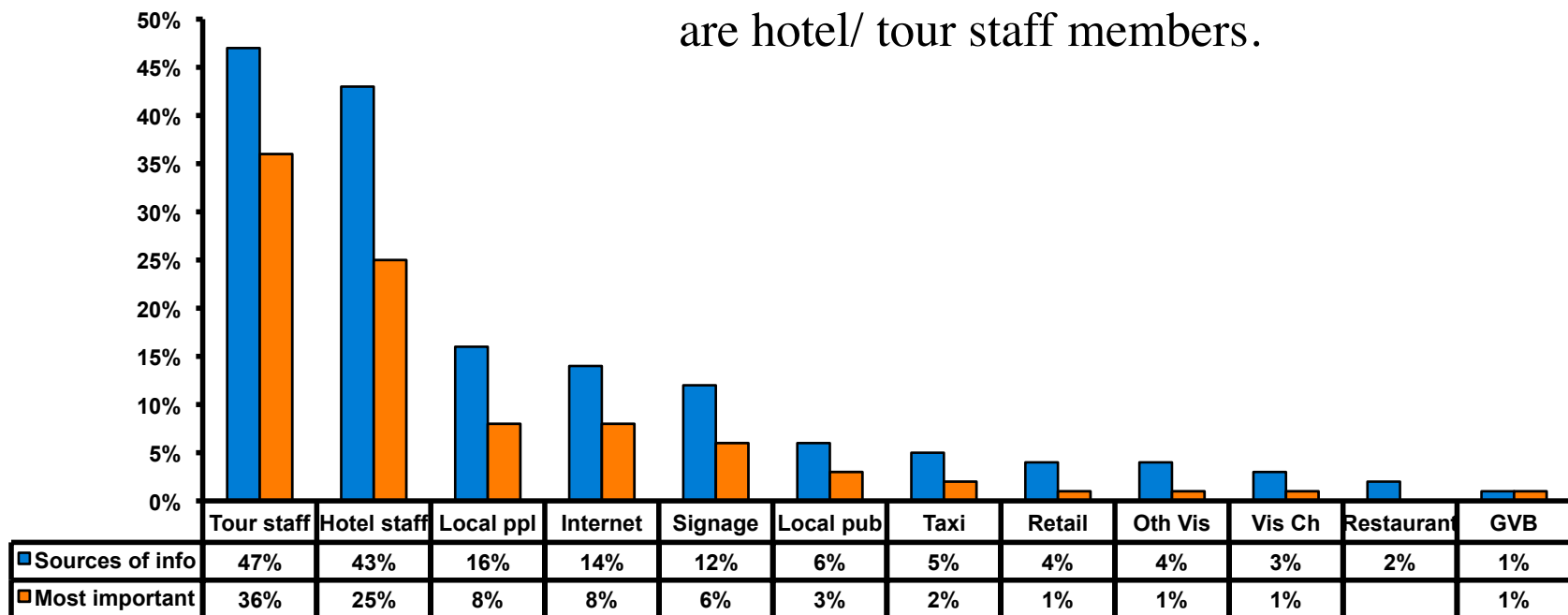
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

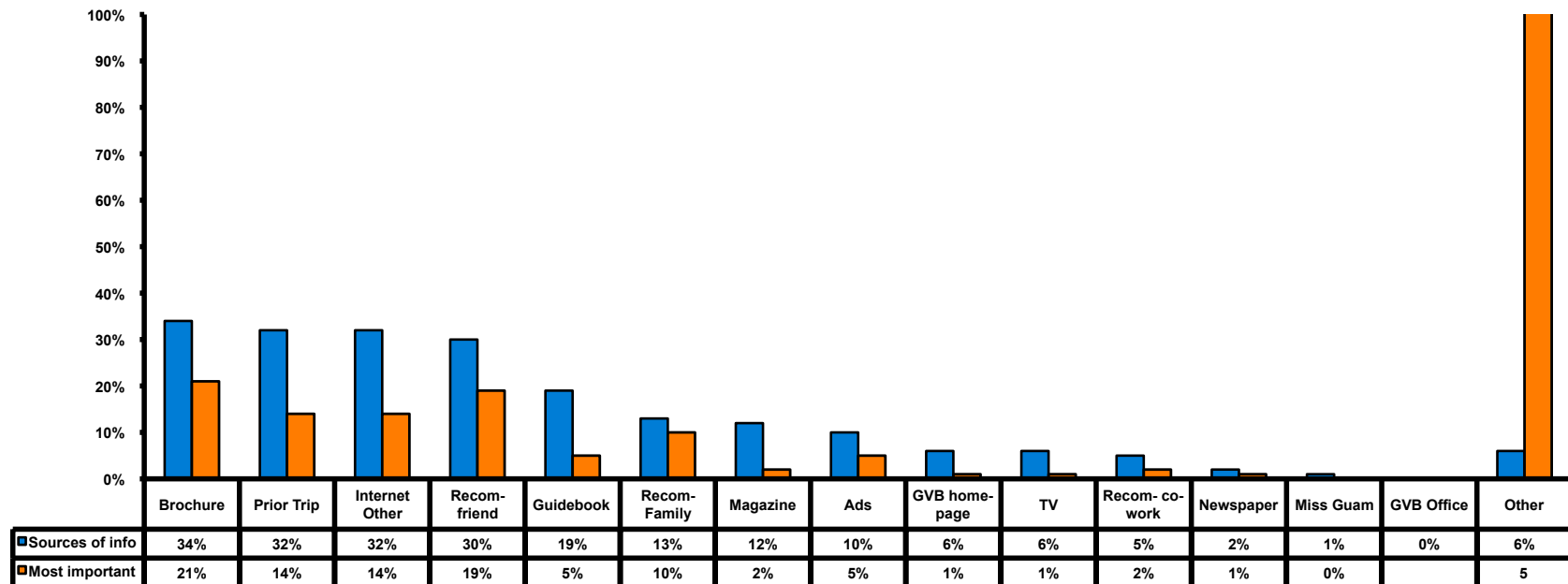
- The primary local source of information are hotel/ tour staff members.



Sources of Information - Motivation

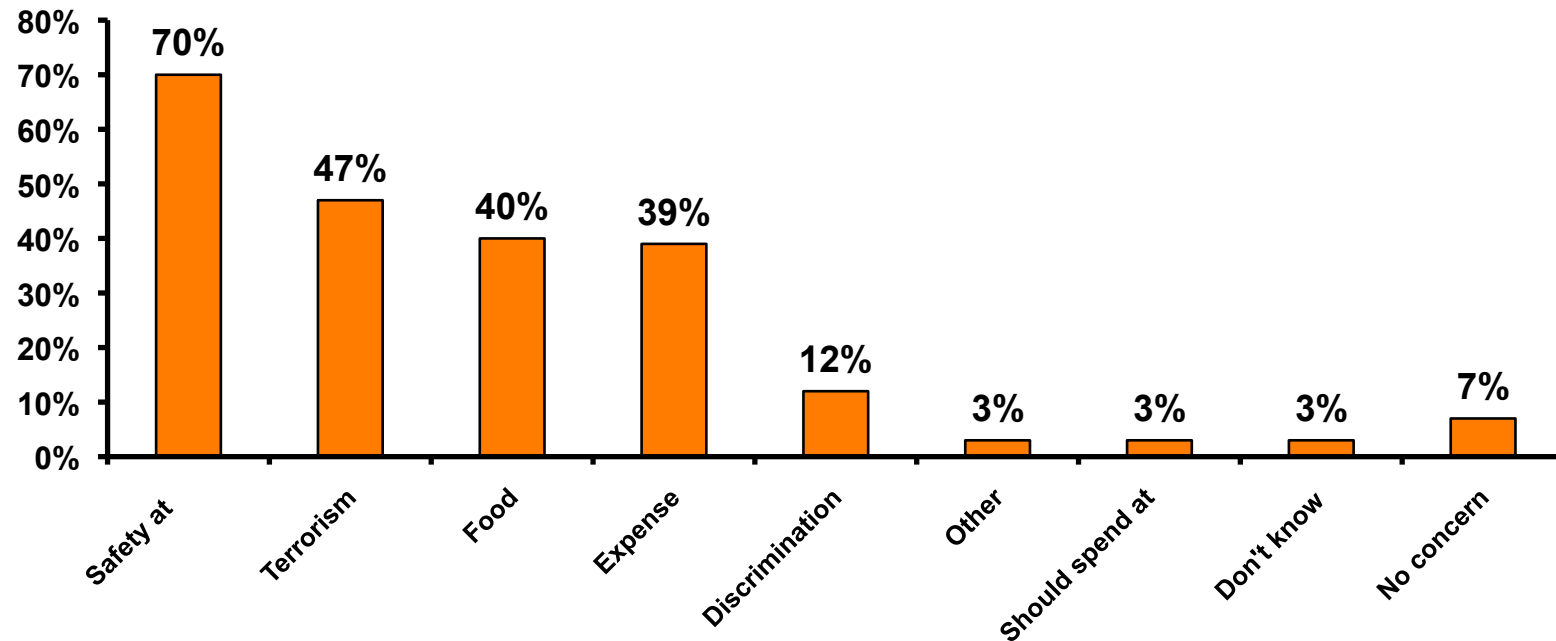
The primary motivational sources of information were.

- Brochures and the Internet



SECTION 6 **OTHER ISSUES**

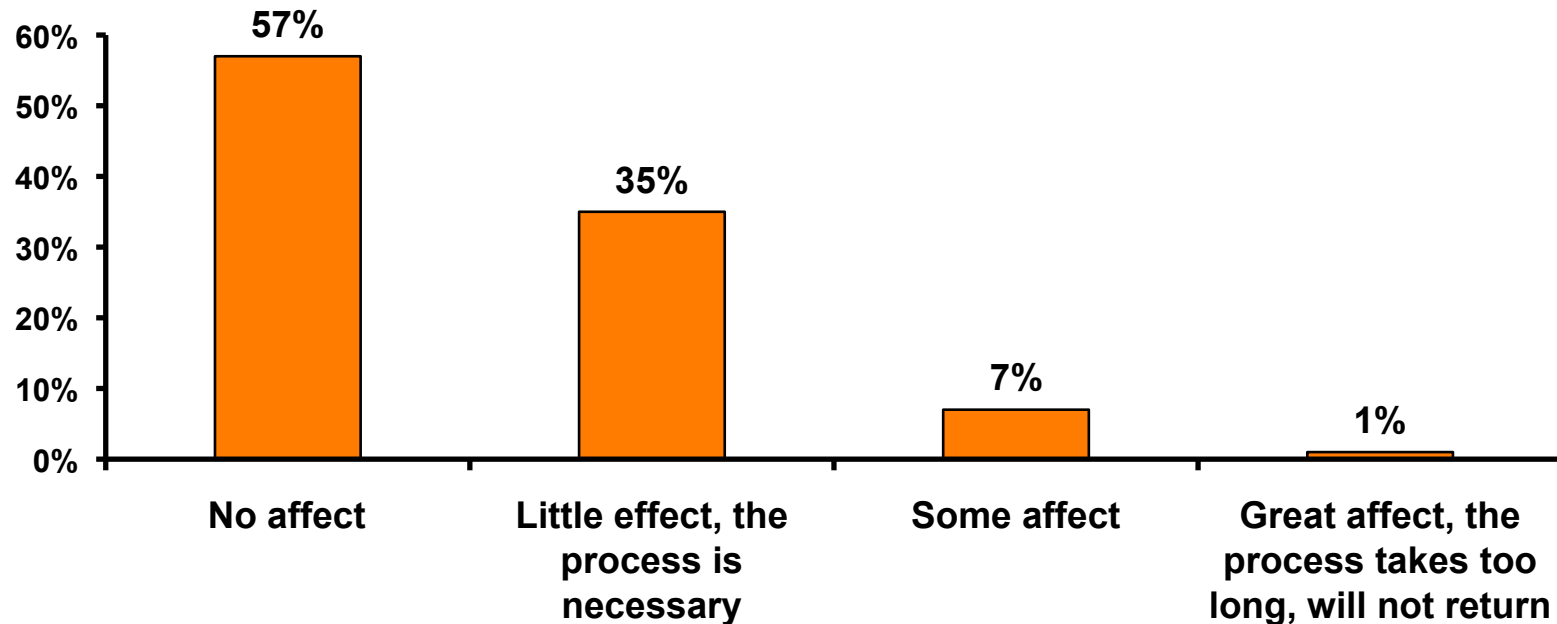
Concerns about travel outside of Japan - Overall



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	70%	66%	71%	71%	77%	68%	66%	77%	88%	77%	67%	61%	50%	
	Terrorism	47%	42%	49%	48%	51%	32%	52%	55%	51%	48%	43%	50%	67%	
	Food	40%	43%	35%	42%	49%	53%	41%	42%	34%	34%	55%	32%	17%	
	Expense	39%	46%	35%	43%	35%	58%	34%	42%	37%	45%	48%	32%	33%	
	Discrimination against Japanese	12%	13%	13%	10%	9%	11%	5%	13%	12%	19%	12%	16%		
	No concerns	7%	6%	6%	9%	5%	11%	11%	6%	5%	8%	2%	9%		
	Other	3%	3%	3%	4%	2%		2%		2%	5%	7%	2%		
	Should spend at home	3%	1%	4%	5%				2%		3%	2%	11%		
	Don't know	3%	3%	3%	3%	2%					3%		2%	17%	
	Total	Count	351	93	136	77	43	19	44	53	41	62	42	44	6

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

