



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013

SEPTEMBER 2013



Prepared by: QMark Research

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Background & Methodology

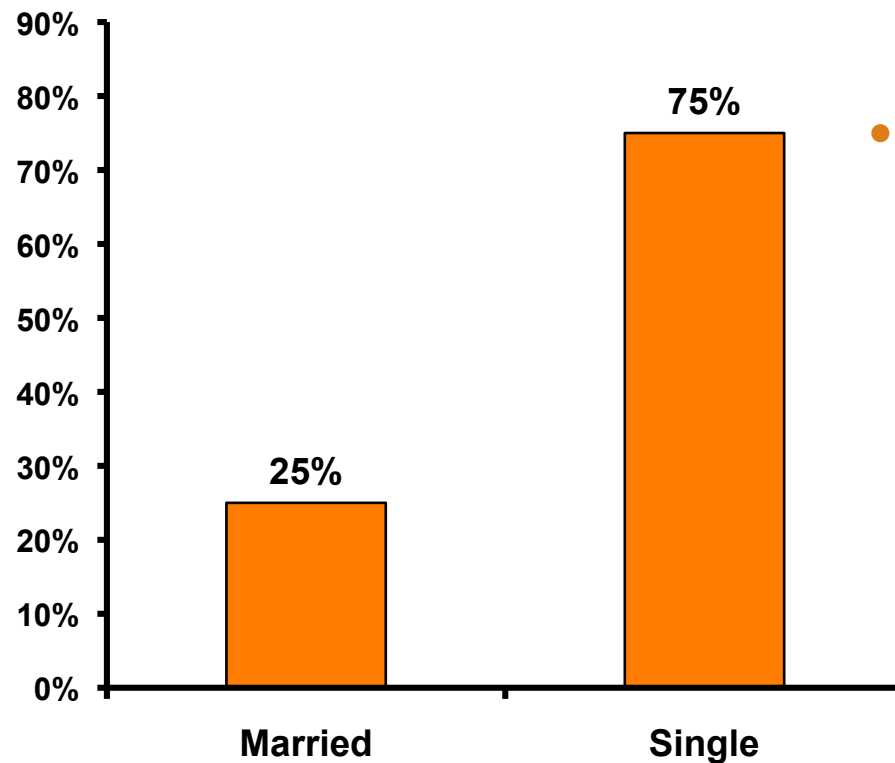
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **351** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.23 percentage points.

Objectives

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

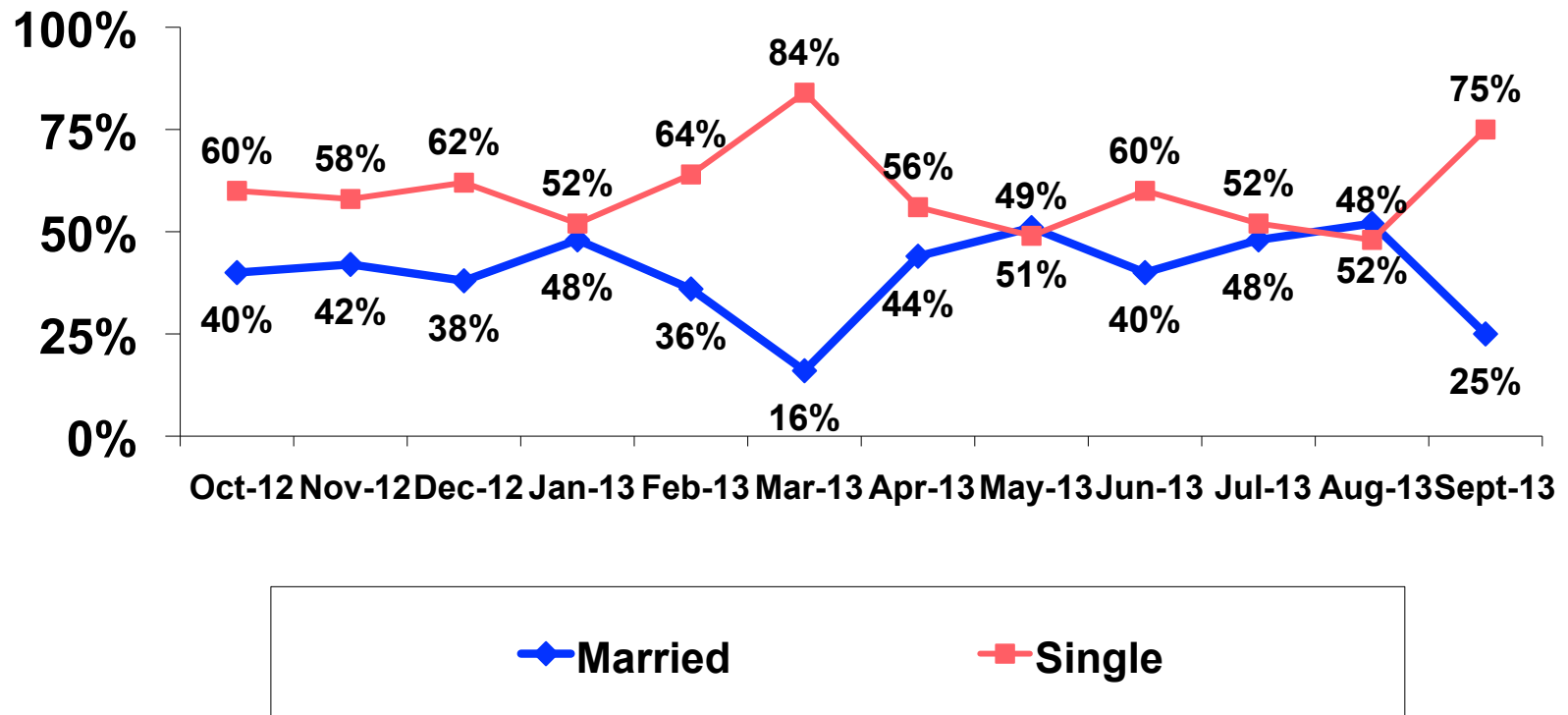
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

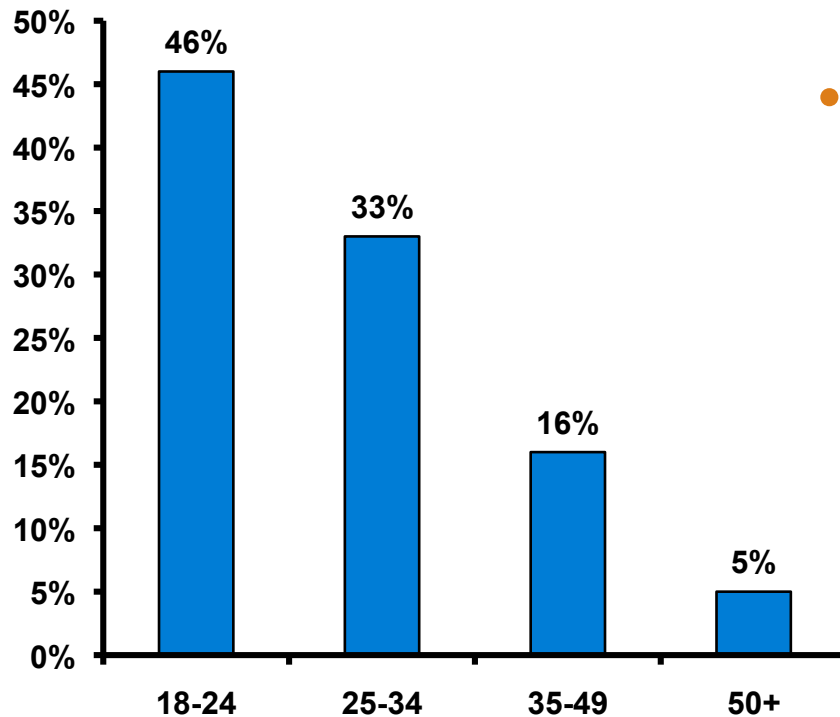


- 80% of 1ST time visitors are single.

Marital Status

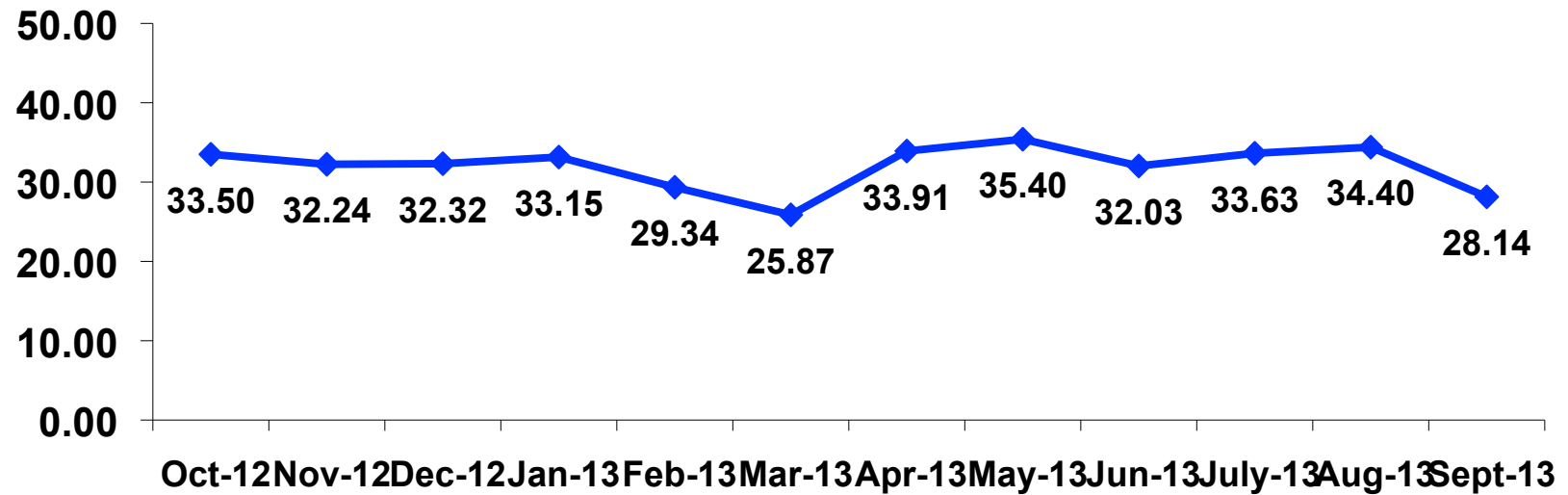


Age - Overall

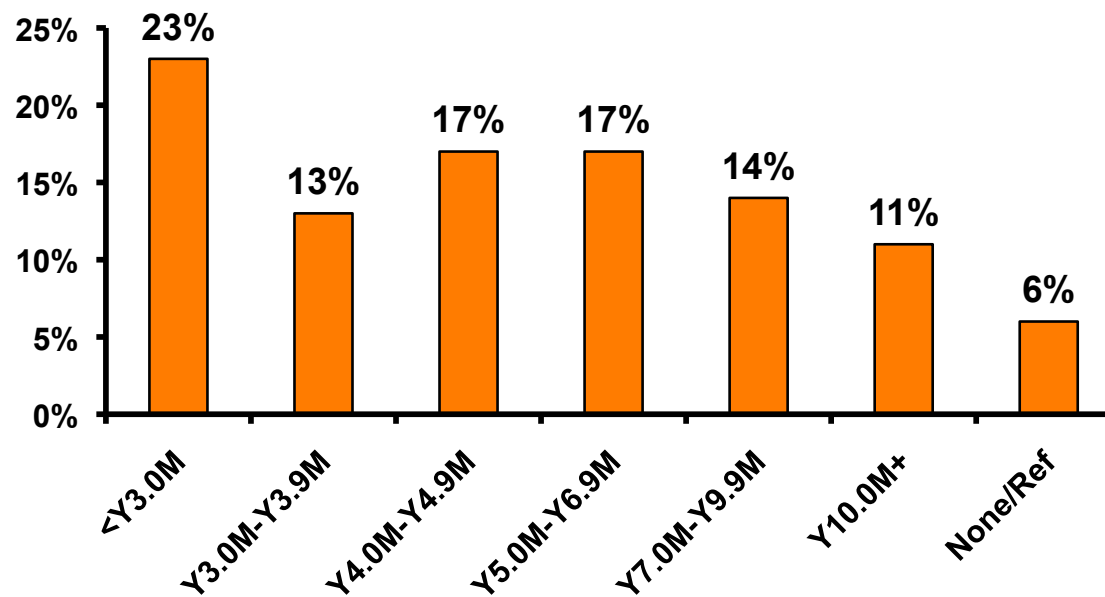


- The average age of the respondents is 28.14 years of age.

Average Age

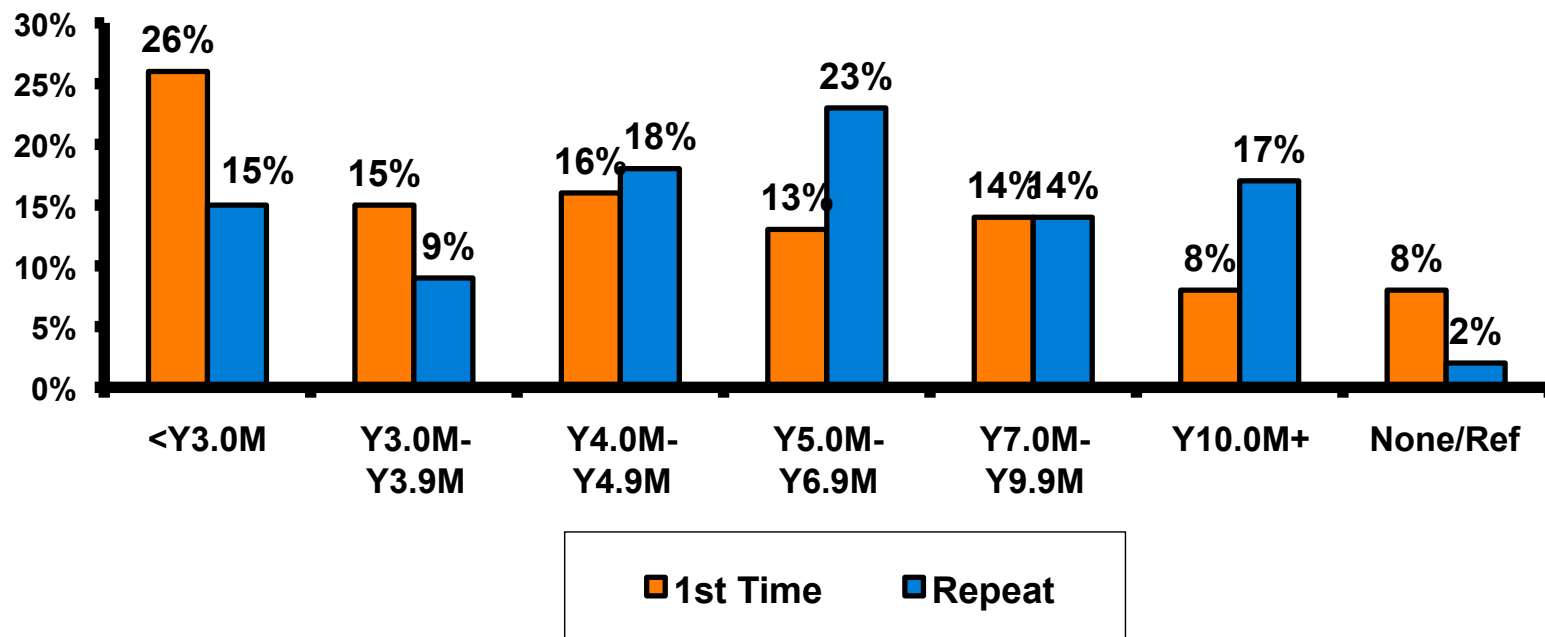


Personal Income



• ¥99.35=\$1

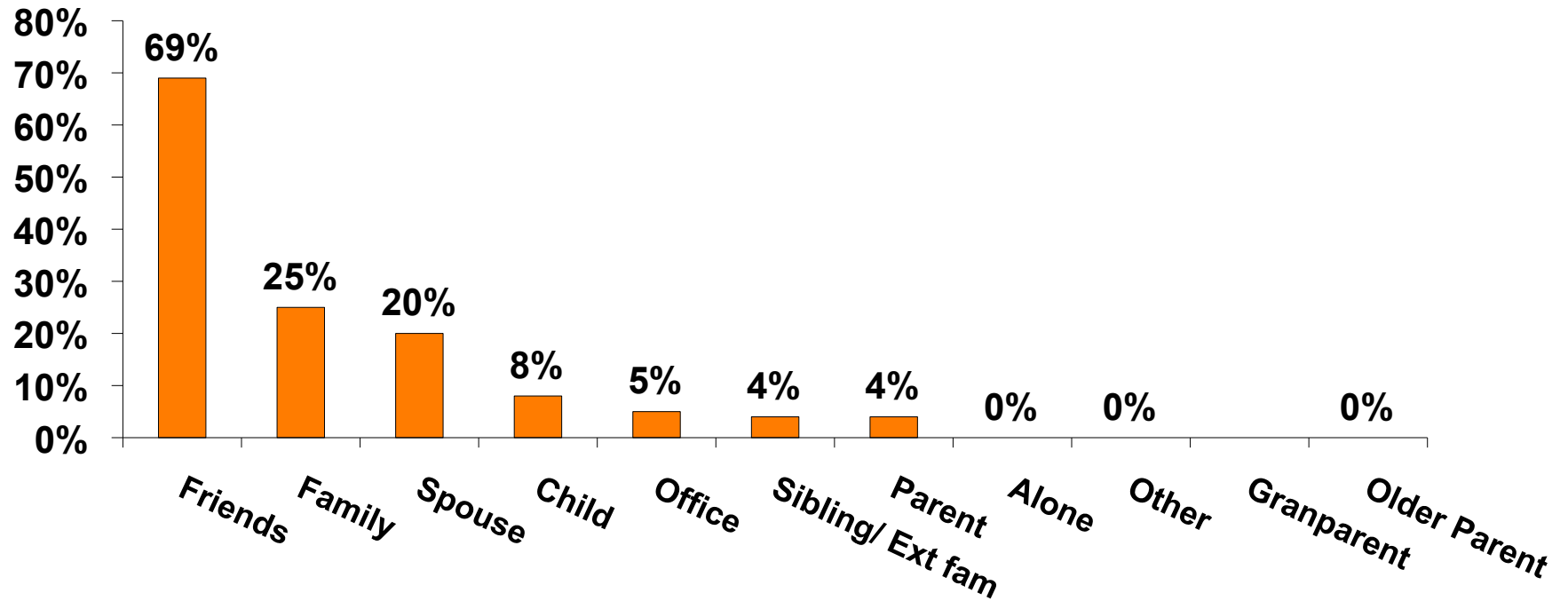
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	25	11	14	20	4		1
		Column N %	9%	7%	10%	17%	4%		6%
	Y2.0M-Y3.0M	Count	41	15	26	17	19	4	
		Column N %	14%	10%	19%	14%	18%	9%	
	Y3.0M-Y4.0M	Count	37	21	16	8	23	5	1
		Column N %	13%	14%	12%	7%	22%	11%	6%
	Y4.0M-Y5.0M	Count	48	28	20	8	25	11	3
		Column N %	17%	19%	14%	7%	24%	24%	17%
	Y5.0M-Y7.0M	Count	48	29	19	17	16	12	3
		Column N %	17%	19%	14%	14%	15%	26%	17%
	Y7.0M-Y10.0M	Count	40	24	16	18	8	10	4
		Column N %	14%	16%	12%	15%	8%	22%	22%
	Y10.0M+	Count	33	18	15	15	8	4	6
		Column N %	11%	12%	11%	13%	8%	9%	33%
	No Income	Count	17	5	12	16	1		
		Column N %	6%	3%	9%	13%	1%		
	Total	Count	289	151	138	119	104	46	18

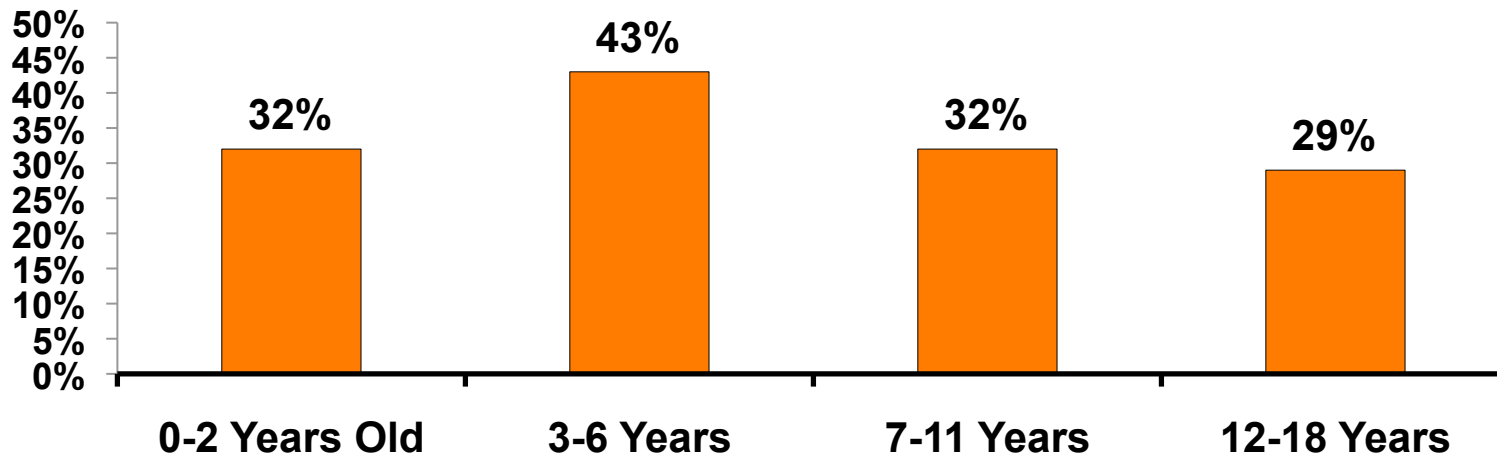
Travel Companions



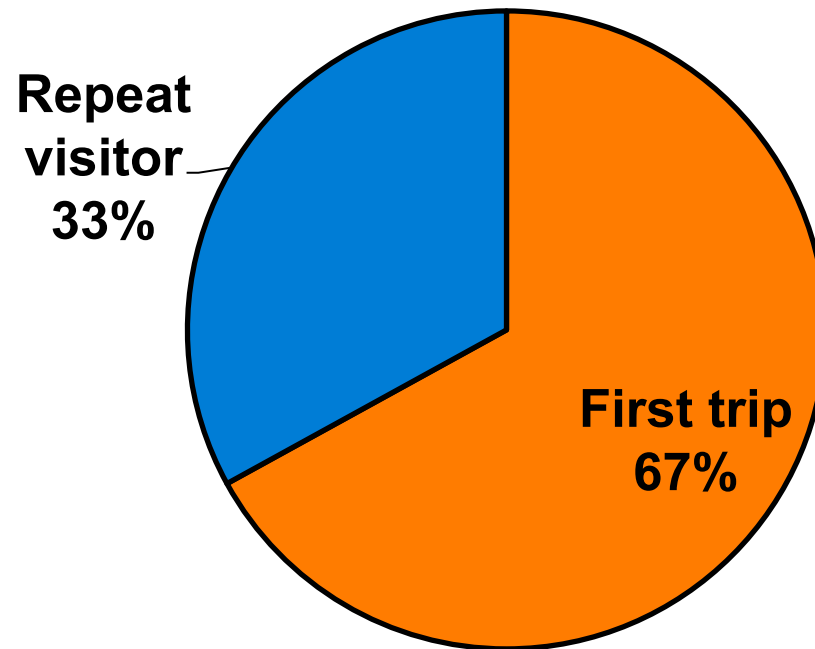
Number of Children Travel Party

N=28 total respondents traveling with children.

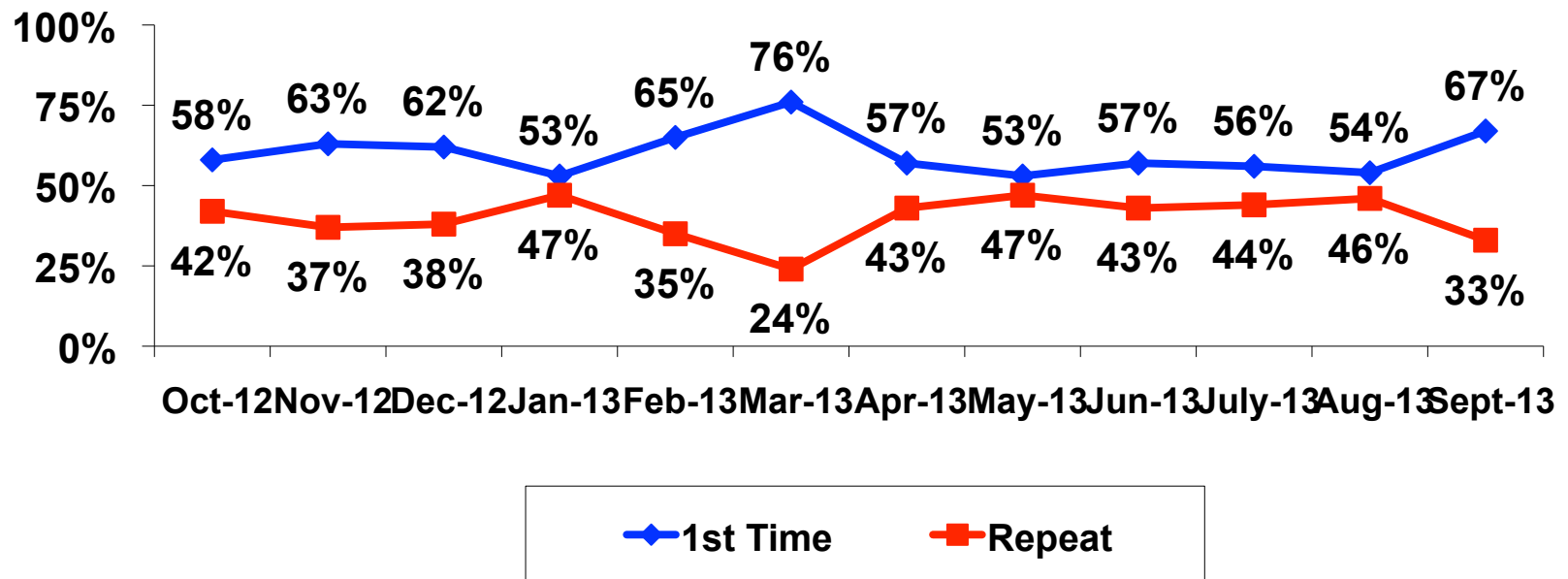
(Of those N=28 respondents, there is a total of 43 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



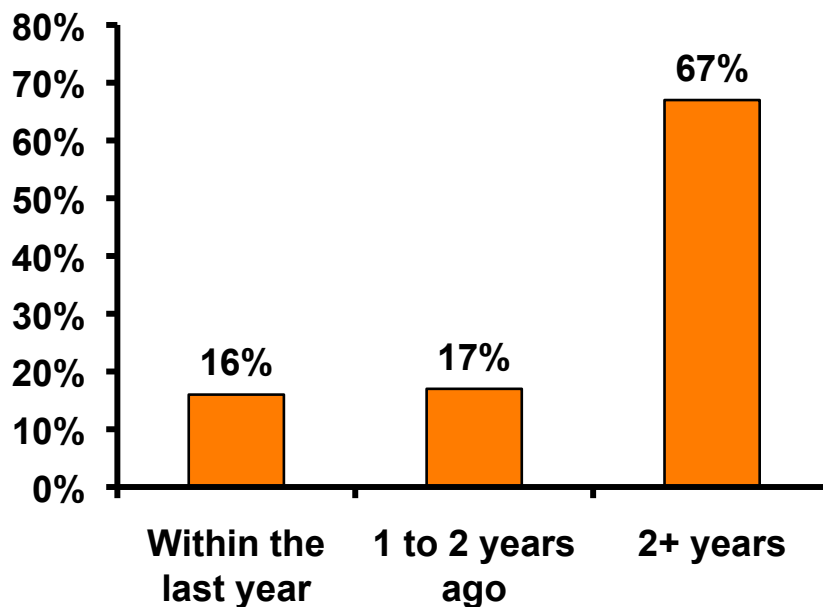
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	174	106	67	
		Column N %	50%	45%	57%	
	Female	Count	177	127	50	
		Column N %	50%	55%	43%	
	Total	Count	351	233	117	
AGE	18-24	Count	158	124	33	
		Column N %	46%	54%	28%	
	25-34	Count	114	74	40	
		Column N %	33%	32%	34%	
	35-49	Count	56	22	34	
		Column N %	16%	10%	29%	
	50+	Count	19	10	9	
		Column N %	5%	4%	8%	
		Total	Count	347	230	116

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

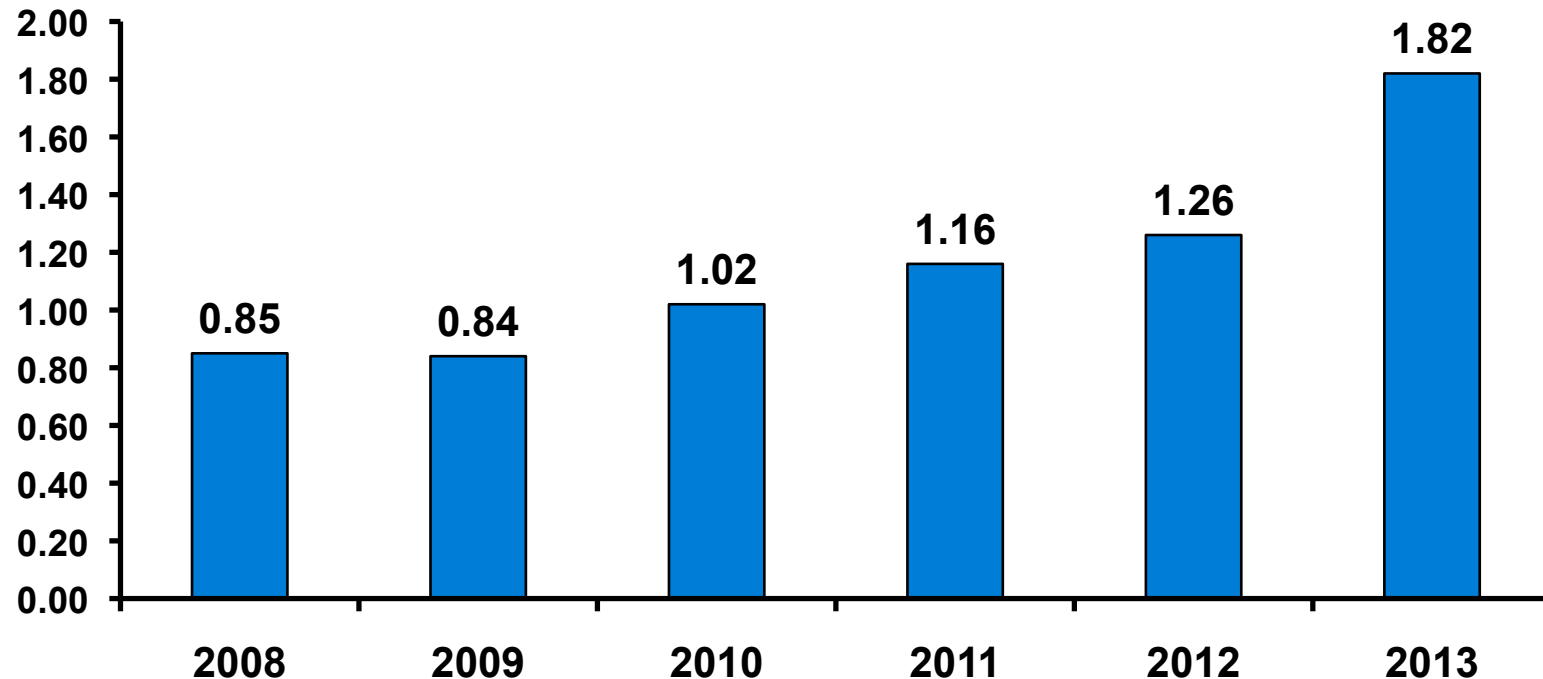
Repeat Visitors Last Trip

n = 115



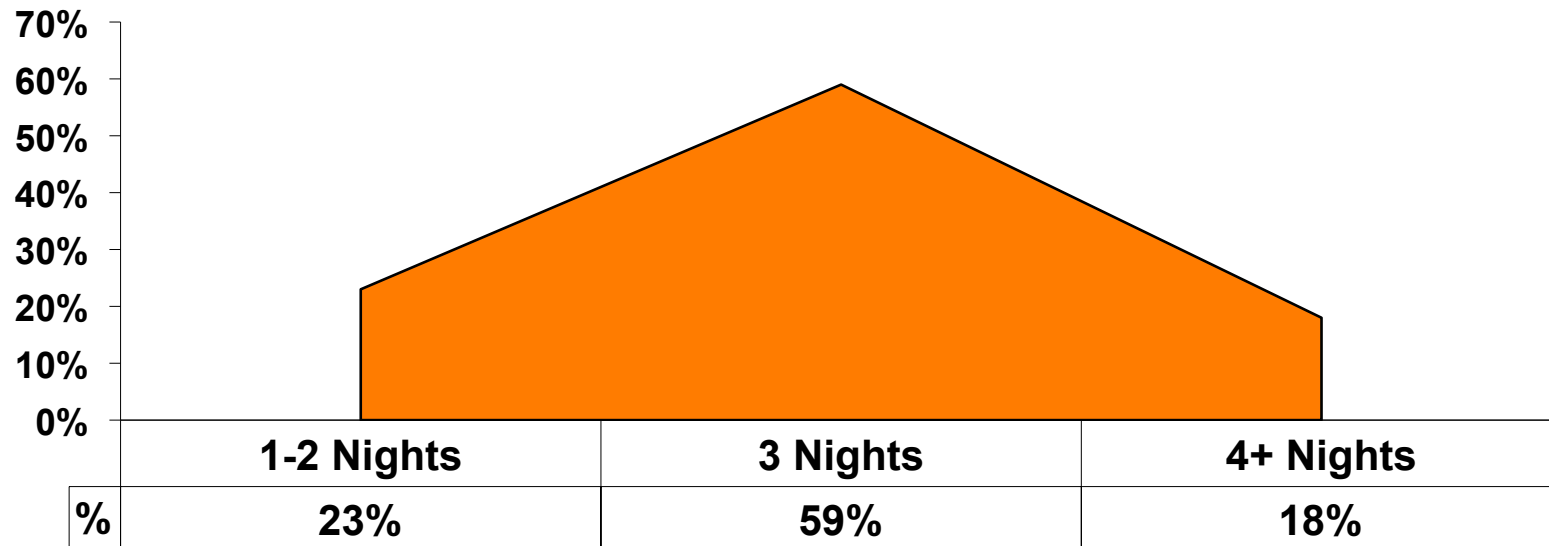
- The average repeat visitor has been to Guam 2.68 times.
- A third of the repeat visitors have been to Guam within the last 2 years.

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

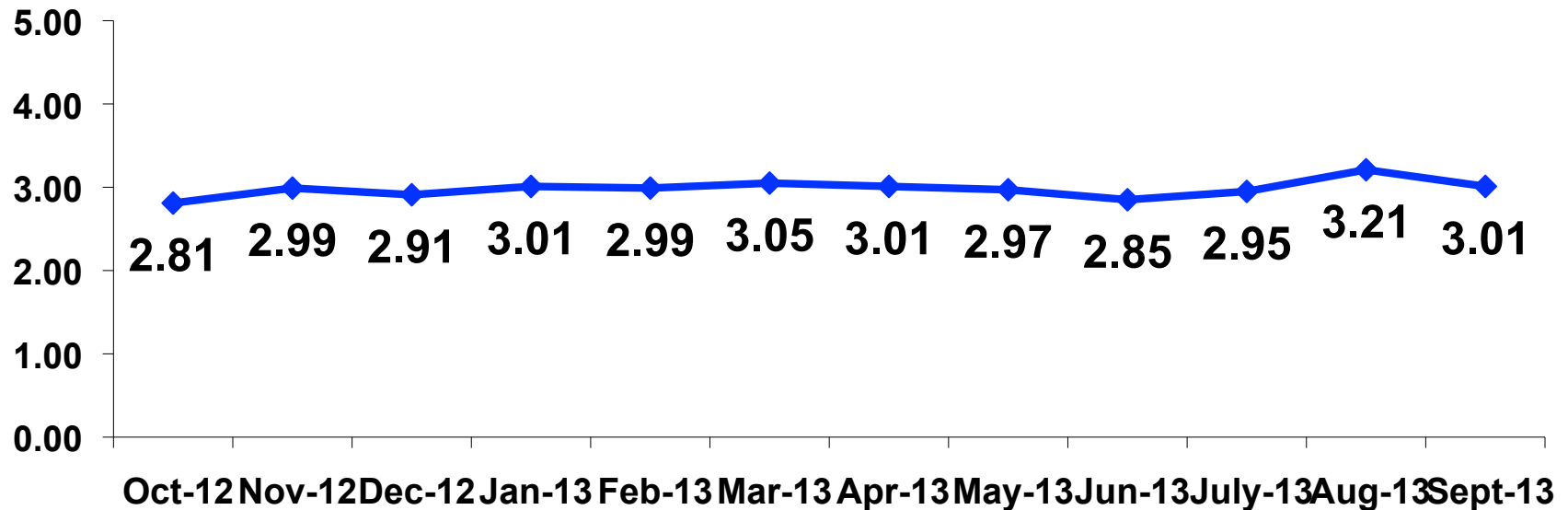


Length of Stay

Mean = 3.01 Days
Median = 3.0 Days



Average Length of Stay

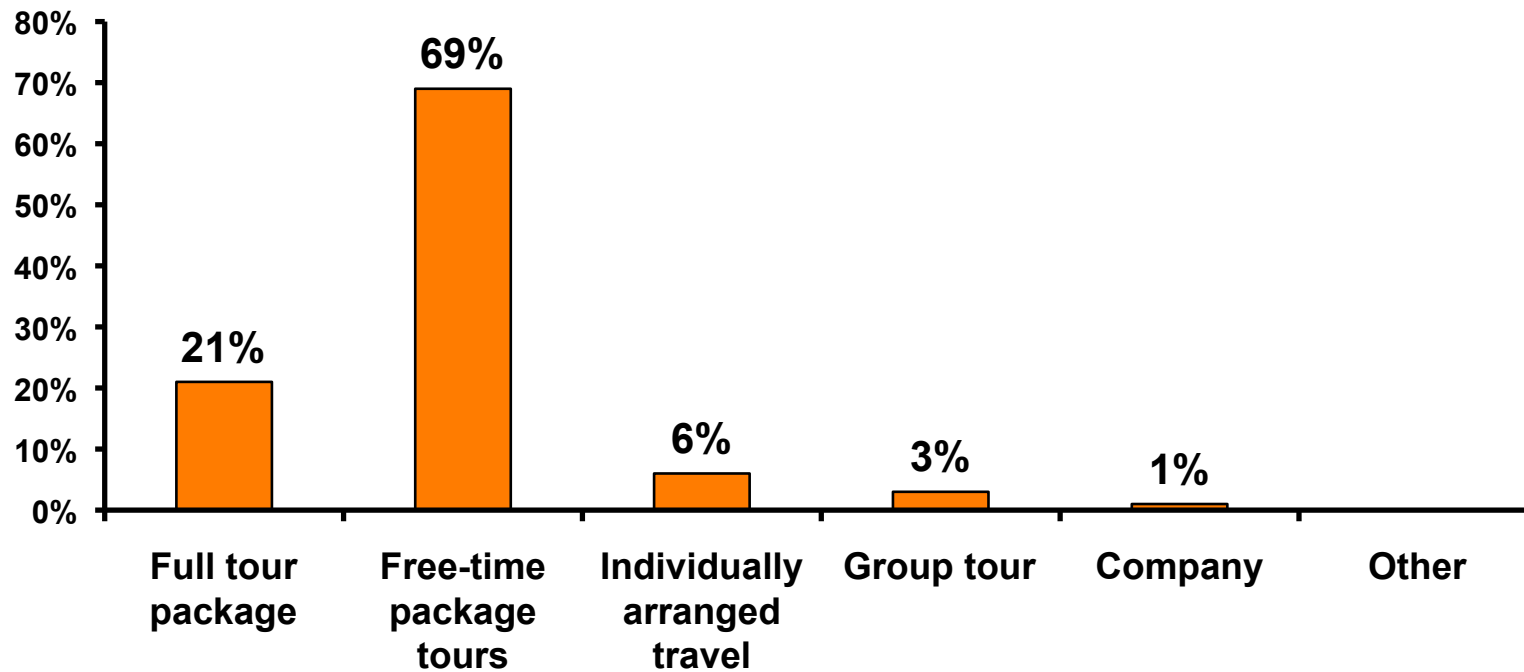


Occupation by Income

		TOTAL	Q26								
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q25	Student	34%	56%	17%	8%	8%	29%	33%	36%	94%	
	Office worker non-mgr	21%	28%	39%	38%	21%	17%	8%	12%		
	Engineer	12%		12%	24%	21%	6%	20%	15%	6%	
	Salesperson	10%	4%	10%	11%	13%	15%	15%	12%		
	Self-employed	4%		5%	5%	4%	6%	8%	6%		
	Manager	4%			3%	2%	13%		12%		
	Professional/ Specialist	3%				6%	2%	10%			
	Govt- office worker non-mgr	3%		5%	5%	4%	4%		3%		
	Homemaker	2%	4%			10%	2%	3%			
	Freeter	1%	4%	2%	3%			3%	3%		
	Other	1%		5%		2%					
	Unemployed	1%			3%	2%					
	Govt- Manager	1%				2%	4%	3%			
	Skilled worker	1%				2%	2%				
	Executive (30+ employees)	1%		2%		2%					
	Free-lancer	0%	4%								
	Teacher	0%		2%							
	Total	Count	341	25	41	37	48	48	40	33	17

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

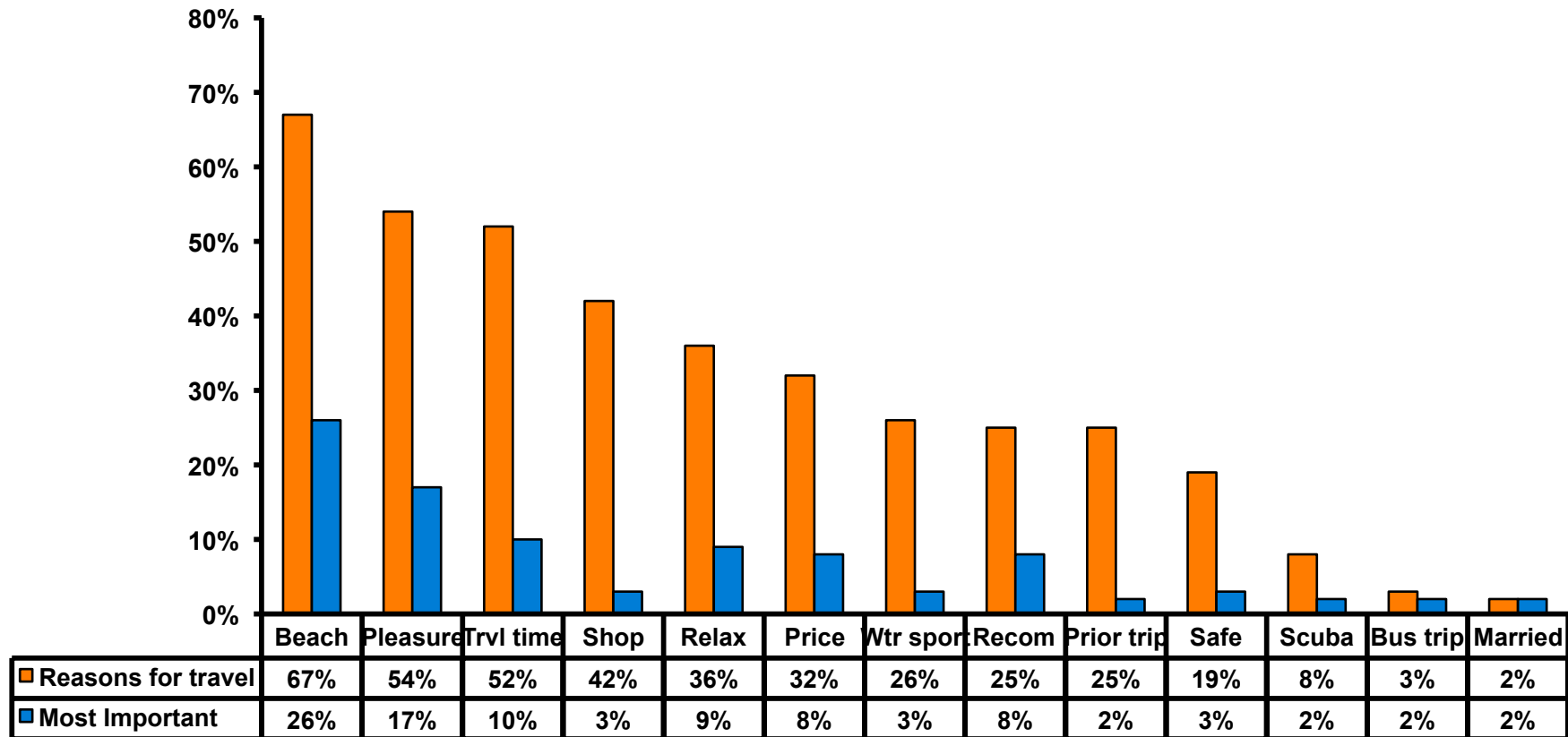


Accommodation by Income

Average length of stay: 3.01 days

	TOTAL	Q26								
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q9										
Guam Plaza Hotel	14%	8%	20%	8%	13%	10%	15%		35%	
Holiday Resort Guam	9%	4%	10%	22%	2%	15%	5%	12%	6%	
Guam Reef & Olive Spa	7%	8%	7%	11%	6%	6%	5%	6%		
Hotel Nikko Guam	7%	4%	5%	3%	13%	10%	8%	9%	6%	
Leo Palace Resort	6%		7%	3%	8%	6%	3%	6%	12%	
PIC Club	6%	12%	2%	5%	6%		5%	27%	6%	
Outrigger Guam Resort	6%		7%	5%	13%	2%	5%	18%		
Fiesta Resort Guam	5%	8%	2%	8%	4%	8%	8%	6%		
Onward Beach Resort	5%		2%	5%	2%	13%	10%	3%		
Grand Plaza Hotel	4%	4%	2%	5%	2%	6%	5%			
Oceanview Hotel	4%	8%	10%	3%		6%	5%		12%	
Pacific Bay Hotel	4%	12%	5%		8%					
Guam Marriott Resort	4%		2%	3%	8%	4%	3%	3%	6%	
Bayview Hotel	3%	4%	5%	5%	2%		3%			
Hotel Santa Fe	3%	4%	5%			2%	5%	6%	6%	
Westin Resort Guam	3%		2%		4%	4%	3%		6%	
Other	2%	16%		5%					6%	
Hyatt Regency Guam	2%	4%			2%	2%	5%			
Hilton Guam Resort	1%				4%	2%	3%			
Sheraton Laguna Guam	1%	4%		3%	2%	2%	3%			
Royal Orchid Guam	1%		2%	5%			3%	3%		
Condo	1%		2%				3%			
Total	Count	351	25	41	37	48	48	40	33	17

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Short travel time and
- Pleasure

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	67%	74%	67%	54%	58%	63%	72%	
	Pleasure	54%	58%	54%	46%	47%	50%	58%	
	Short travel time	52%	44%	61%	50%	74%	51%	53%	
	Shopping	42%	47%	42%	34%	16%	30%	54%	
	Relax	36%	32%	39%	36%	37%	39%	33%	
	Price	32%	33%	35%	27%	16%	26%	38%	
	Water sports	26%	29%	29%	16%	11%	24%	29%	
	Recomm- friend/family/trvl agnt	25%	31%	28%	9%	5%	18%	32%	
	Previous trip	25%	15%	26%	41%	42%	28%	21%	
	Safe	19%	16%	17%	27%	26%	20%	17%	
	Scuba	8%	8%	6%	9%	11%	9%	6%	
	Other	3%	3%	2%	5%	5%	5%	2%	
	Company/ Business Trip	3%	1%	4%	7%		4%	2%	
	Married/ Attn wedding	2%		1%	7%	11%	3%	1%	
	Golf	2%		2%	7%		3%		
	Organized sports	1%		3%	2%		2%		
	Honeymoon	1%		2%	4%		2%		
	Company Sponsored	1%	1%	1%	4%		1%	1%	
	Visit friends/ Relatives	1%	3%				1%	1%	
	Career Cert/ Testing	0%				5%	1%		
	Total	Count	351	158	114	56	19	174	177

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	67%	80%	61%	76%	63%	58%	73%	70%	82%	
Pleasure	54%	60%	51%	59%	58%	46%	63%	58%	53%	
Short travel time	52%	48%	41%	65%	48%	52%	55%	67%	47%	
Shopping	42%	60%	44%	41%	42%	42%	43%	36%	29%	
Relax	36%	20%	29%	41%	40%	40%	40%	58%	18%	
Price	32%	12%	37%	35%	31%	25%	43%	27%	53%	
Water sports	26%	28%	37%	24%	19%	19%	25%	36%	24%	
Recomm- friend/family/trvl agnt	25%	24%	29%	16%	25%	33%	13%	24%	18%	
Previous trip	25%	20%	15%	19%	31%	33%	33%	33%	12%	
Safe	19%	20%	15%	32%	23%	27%	15%	18%	12%	
Scuba	8%	4%		3%	13%	6%	13%	3%	12%	
Other	3%		5%	3%	2%	6%	3%			
Company/ Business Trip	3%		7%	5%	6%	2%			6%	
Married/ Attn wedding	2%			5%	2%	6%				
Golf	2%			3%		6%	3%			
Organized sports	1%				4%	4%				
Honeymoon	1%				4%	2%	3%			
Company Sponsored	1%				2%	4%			6%	
Visit friends/ Relatives	1%		2%		2%	2%				
Career Cert/ Testing	0%							3%		
Total	Count	351	25	41	37	48	48	40	33	17

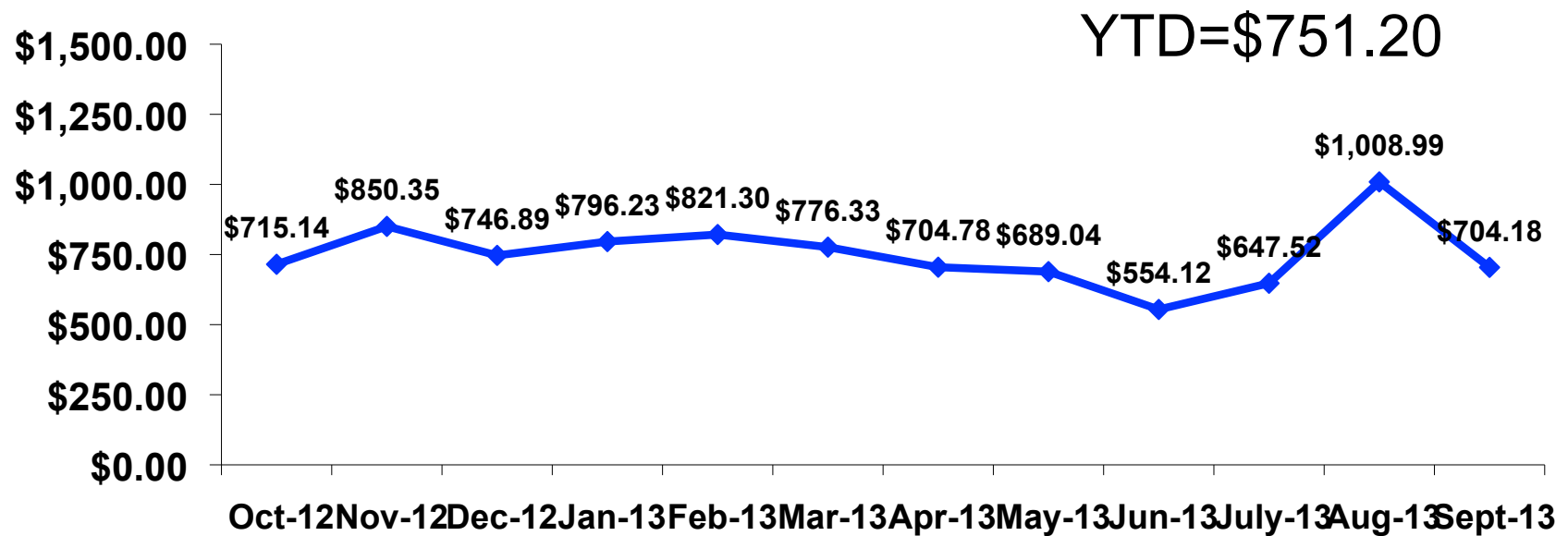
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥99.35/US\$1

- \$1,106.89 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$10,065 = maximum (highest amount recorded for the entire sample)
- \$704.18 = overall mean average per person prepaid expenditures

Prepaid Expenditures\Per Person



Breakdown of Prepaid Expenditures

¥99.35=\$1

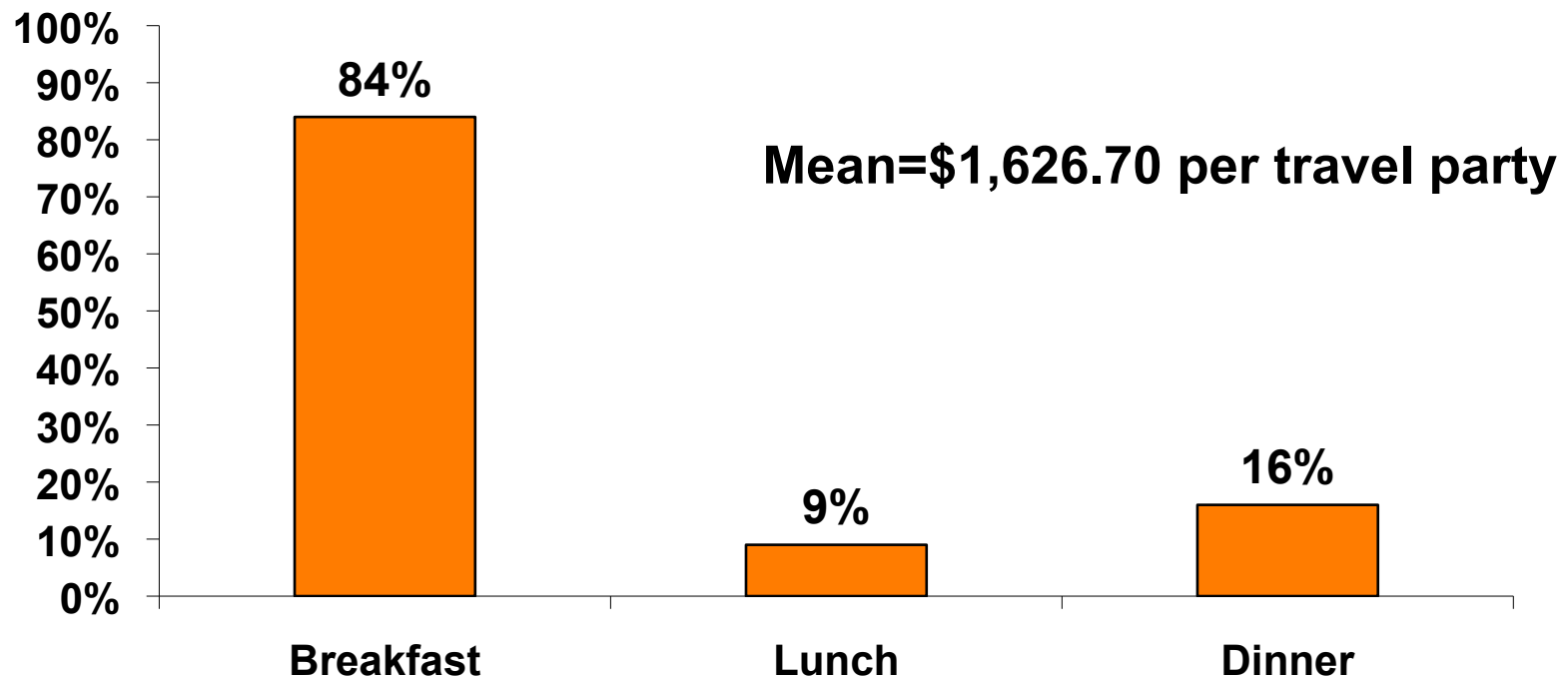
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,054.57
Air & Accommodation w/ daily meal package	\$1,626.70
Air only	\$1,373.93
Accommodation only	\$869.94
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation - Japan	\$46.34
Ground transportation - Guam	\$38.25
Optional tours/ activities	\$190.91
Other expenses	\$206.97
Total Prepaid	\$1,106.89

Prepaid Meal Breakdown

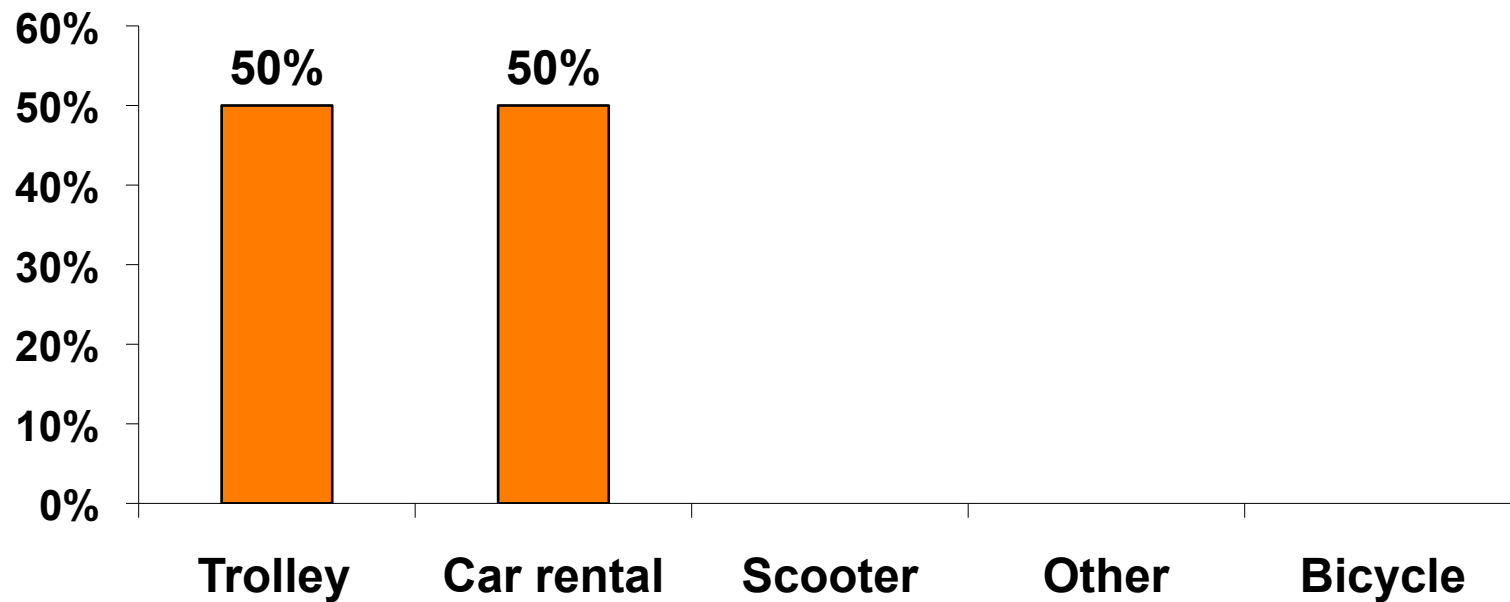
Air/ Accommodations with Daily Meal Package

n=32



Prepaid Ground Transportation

n=2

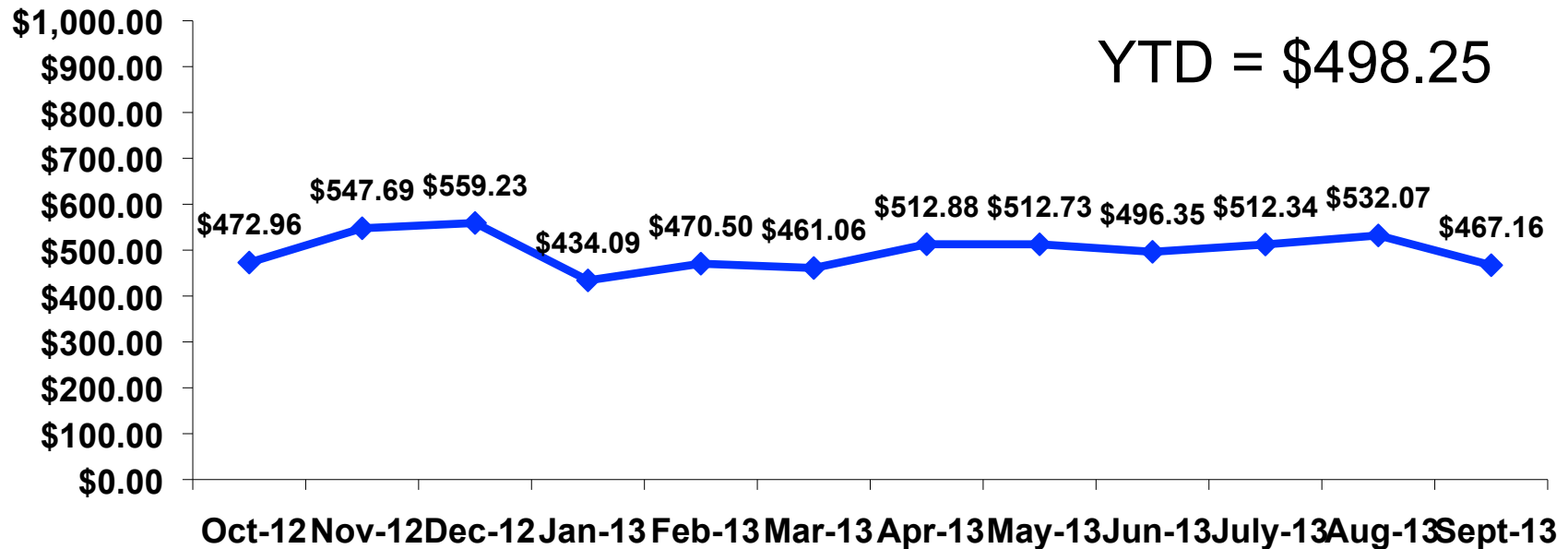


Mean=\$38.25 per travel party

On-Island Expenditures

- \$644.02 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,500 = Maximum (highest amount recorded for the entire sample)
- \$467.16 = overall mean average per person on-island expenditure

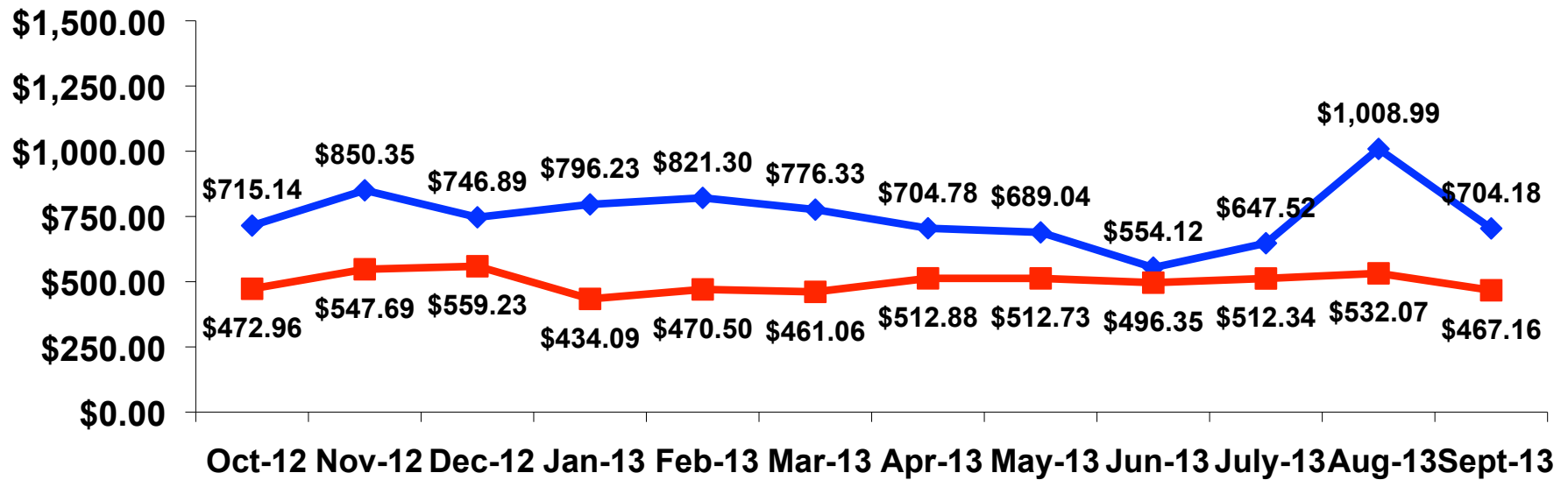
On-Island Expenditures Per Person



Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$751.20

On-Isle YTD = \$498.25



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	\$467.16	\$434.91	\$498.87	\$369.76	\$499.11	\$424.87	\$439.18	\$430.05	\$595.38	\$604.88	\$466.67
	Median	\$400	\$350	\$400	\$350	\$400	\$375	\$311	\$350	\$500	\$500	\$400
	Minimum	\$0	\$0	\$0	\$0	\$0	\$67	\$167	\$0	\$0	\$0	\$300
	Maximum	\$3,000	\$2,000	\$3,000	\$1,100	\$2,000	\$1,000	\$1,200	\$2,087	\$3,000	\$2,000	\$700

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$22.48	\$37.02	\$8.19	\$10.47	\$15.09	\$54.61	\$76.84
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$33.54	\$38.90	\$28.28	\$30.93	\$28.74	\$43.45	\$56.21
	Median	\$10	\$13	\$10	\$10	\$4	\$30	\$50
F&B RESTRNT	Mean	\$76.78	\$106.70	\$47.37	\$44.23	\$97.64	\$122.95	\$93.95
	Median	\$25	\$50	\$10	\$7	\$50	\$78	\$50
OPT TOUR	Mean	\$67.72	\$68.31	\$67.14	\$54.45	\$87.72	\$63.59	\$74.21
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$184.29	\$199.17	\$169.66	\$104.08	\$202.77	\$334.54	\$282.11
	Median	\$30	\$30	\$40	\$10	\$40	\$100	\$100
GIFT- OTHER	Mean	\$91.74	\$92.47	\$91.02	\$67.72	\$85.69	\$161.93	\$117.89
	Median	\$50	\$50	\$40	\$30	\$50	\$100	\$40
TRANS	Mean	\$15.68	\$21.24	\$10.23	\$9.94	\$17.96	\$22.84	\$31.95
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$151.05	\$174.46	\$128.03	\$130.59	\$164.71	\$175.88	\$197.74
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$644.02	\$738.49	\$551.15	\$453.85	\$700.32	\$980.32	\$930.89
	Median	\$500	\$500	\$400	\$395	\$500	\$747	\$700

On-Island Expenditures

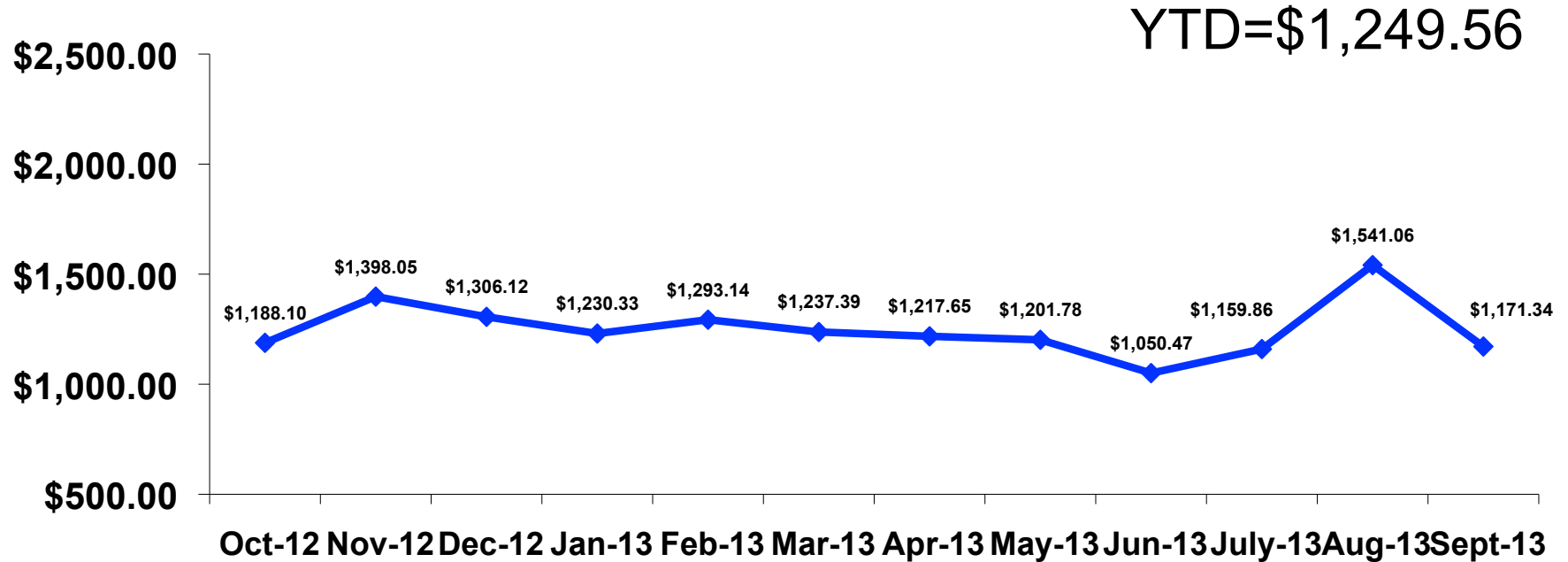
First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$22.48	\$15.07	\$37.44
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$33.54	\$33.00	\$34.84
	Median	\$10	\$10	\$10
F&B RESTRNT	Mean	\$76.78	\$63.88	\$102.70
	Median	\$25	\$10	\$60
OPT TOUR	Mean	\$67.72	\$57.50	\$88.64
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$184.29	\$151.36	\$251.43
	Median	\$30	\$20	\$50
GIFT- OTHER	Mean	\$91.74	\$86.15	\$103.22
	Median	\$50	\$50	\$50
TRANS	Mean	\$15.68	\$13.85	\$19.48
	Median	\$0	\$0	\$0
OTHER	Mean	\$151.05	\$156.68	\$139.07
	Median	\$0	\$0	\$0
TOTAL	Mean	\$644.02	\$578.60	\$776.81
	Median	\$500	\$400	\$550

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,171.34 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,805 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person



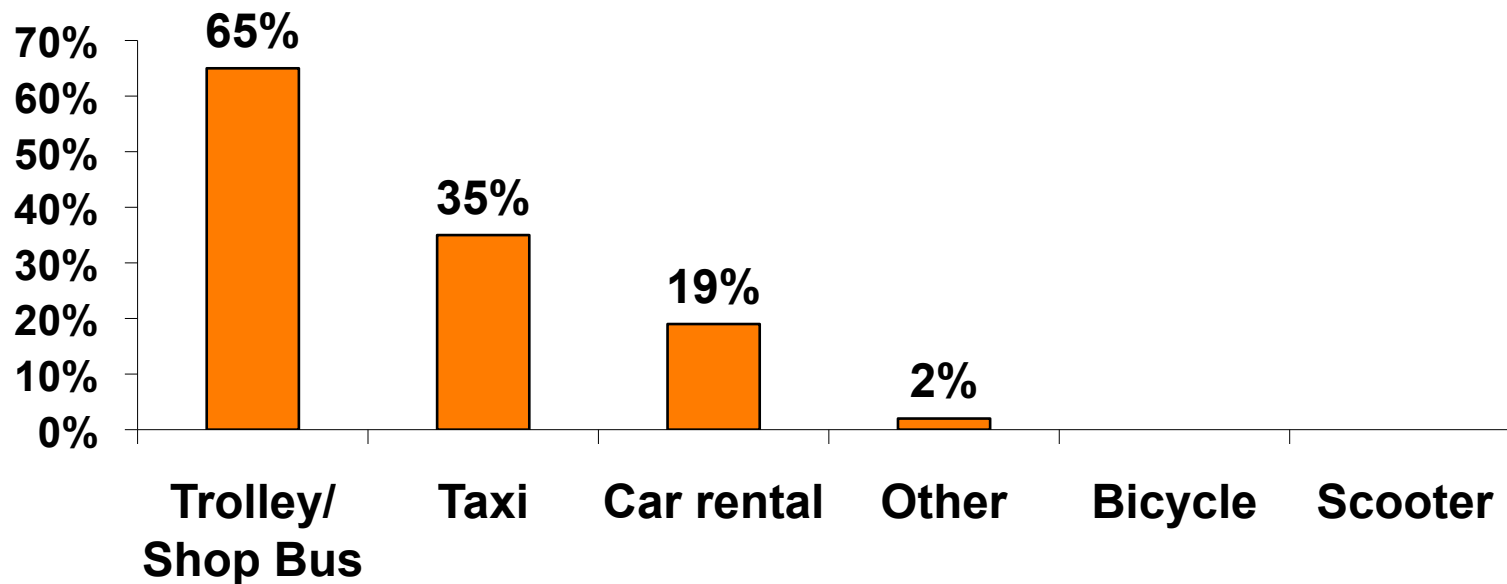
Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$22.48
Food & beverage in fast food restaurant/ convenience store	\$33.54
Food & beverage at restaurants or drinking establishments outside a hotel	\$76.78
Optional tours and activities	\$67.72
Gifts/ souvenirs for yourself/companions	\$184.29
Gifts/ souvenirs for friends/family at home	\$91.74
Local transportation	\$15.68
Other expenses not covered	\$151.05
Average Total	\$644.02

Local Transportation

n=93

Mean=\$15.68 per travel party



Guam Airport Expenditures

- \$26.05 = Mean
- \$5 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$800 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

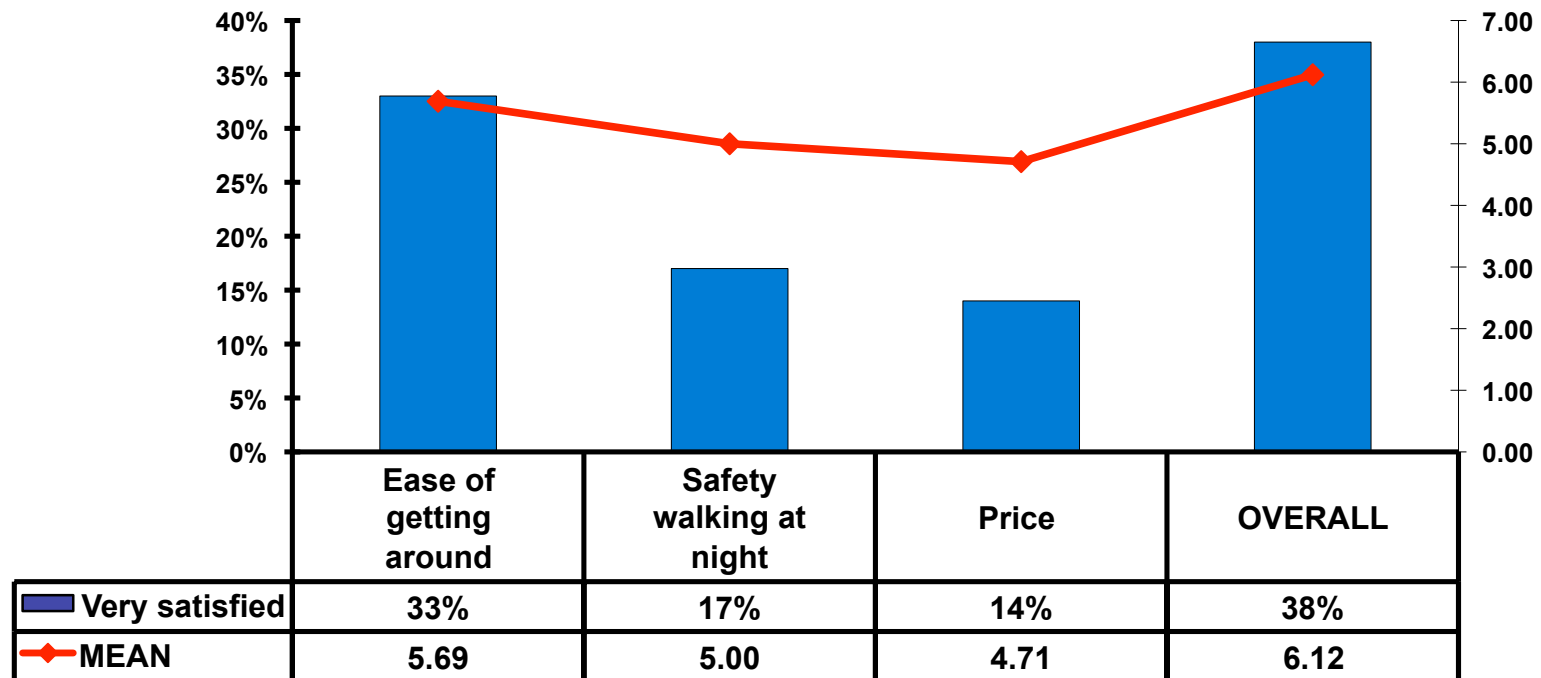
	MEAN \$
Food & Beverages	\$7.33
Gifts/Souvenirs Self	\$9.17
Gifts/Souvenirs Others	\$9.54
Total	\$26.05

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

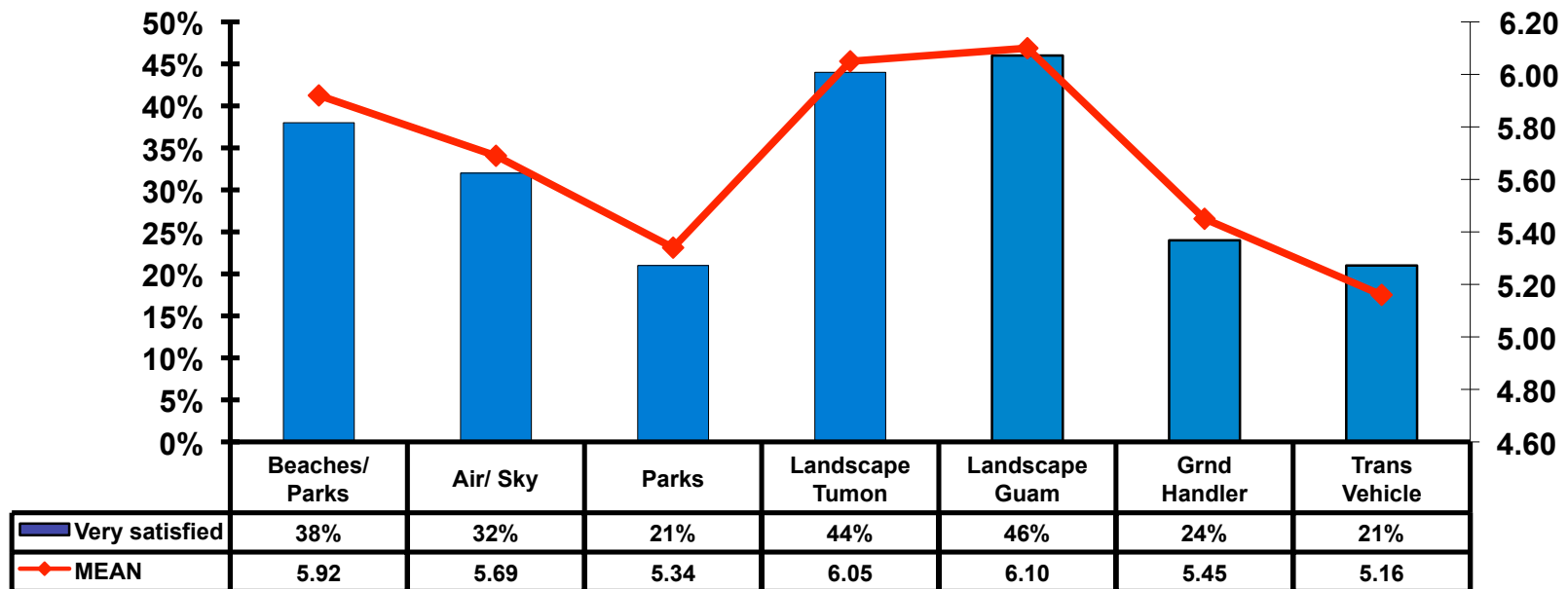
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

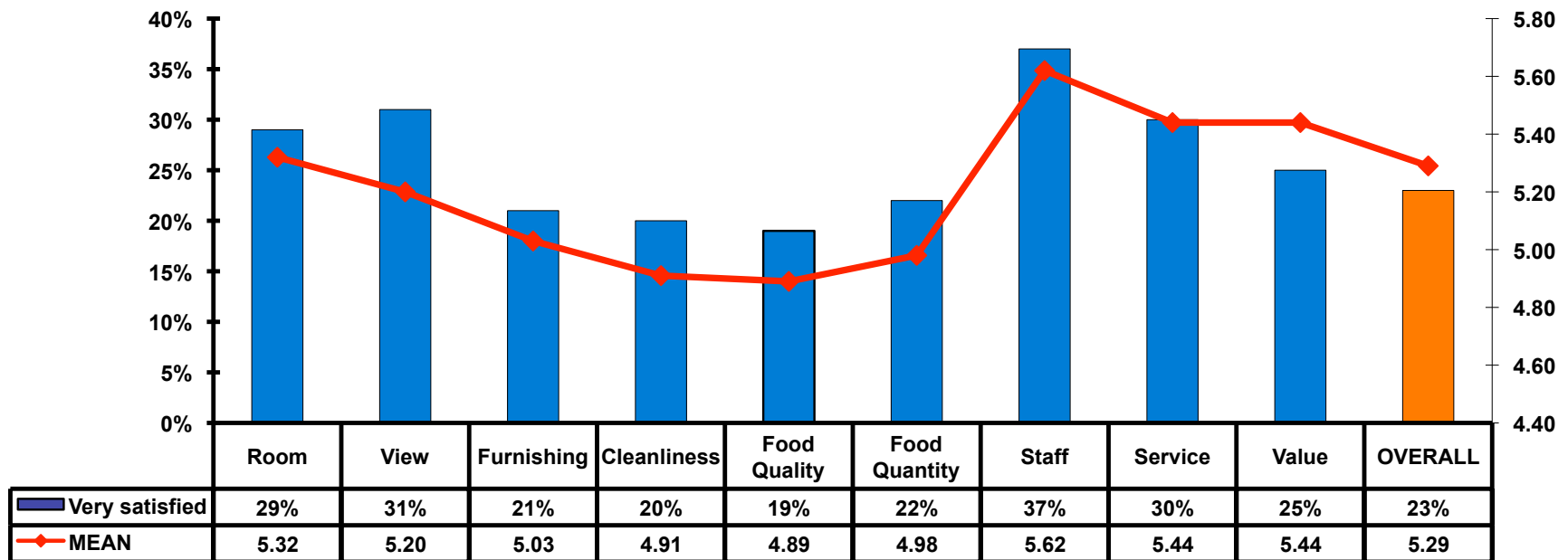
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

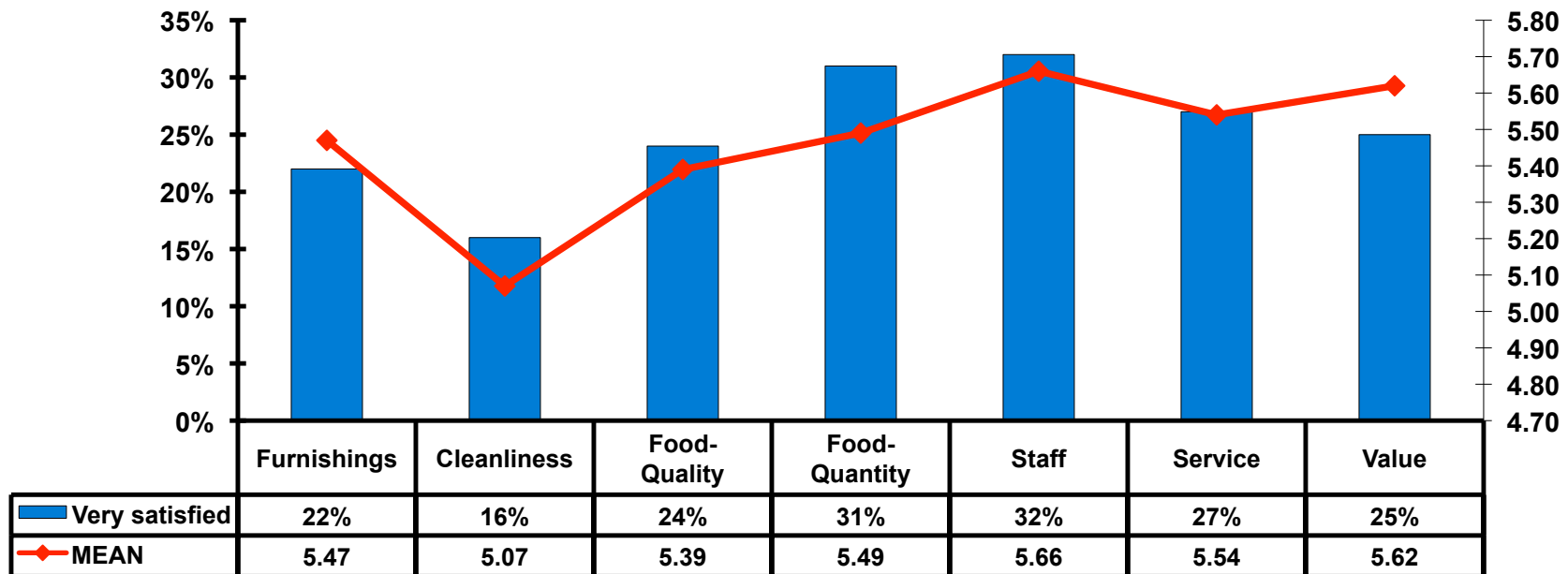
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

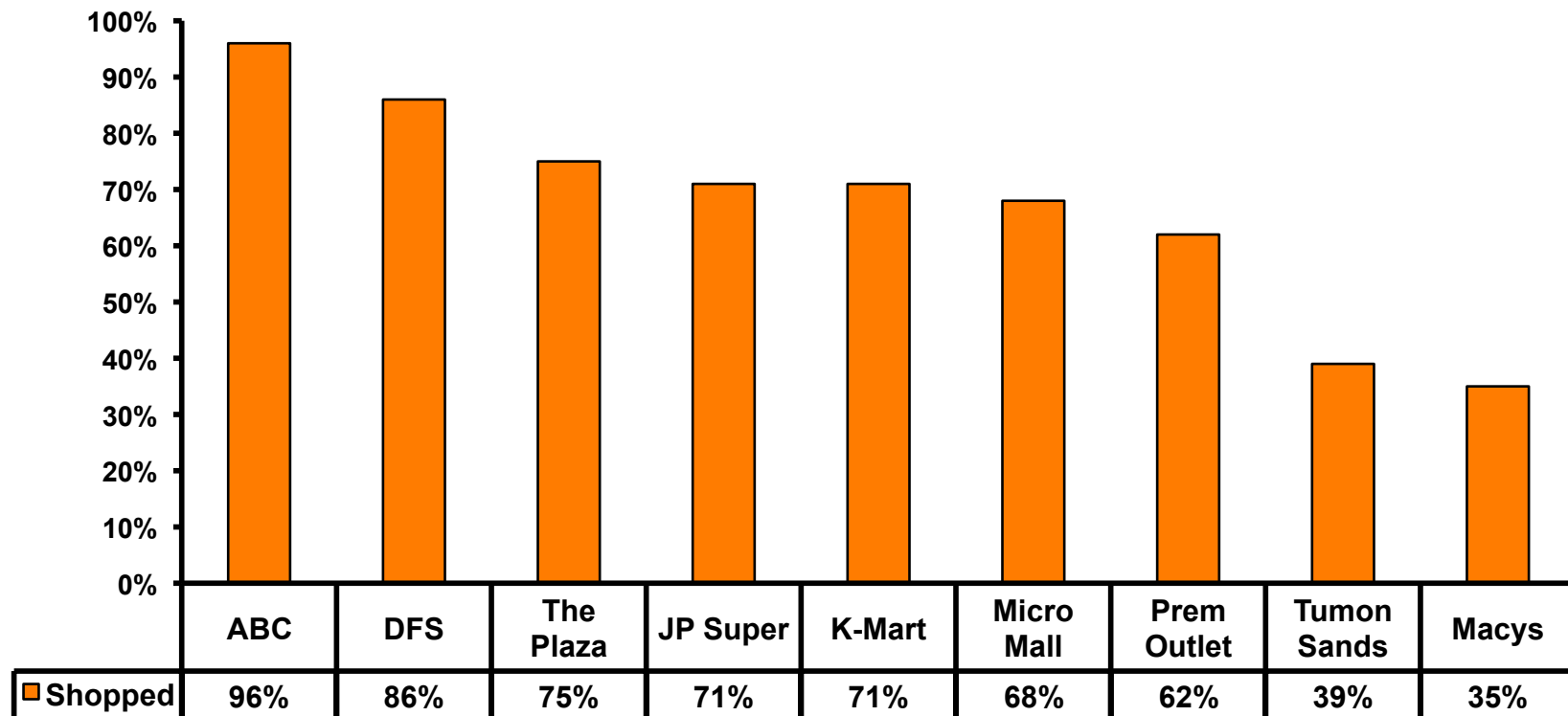
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

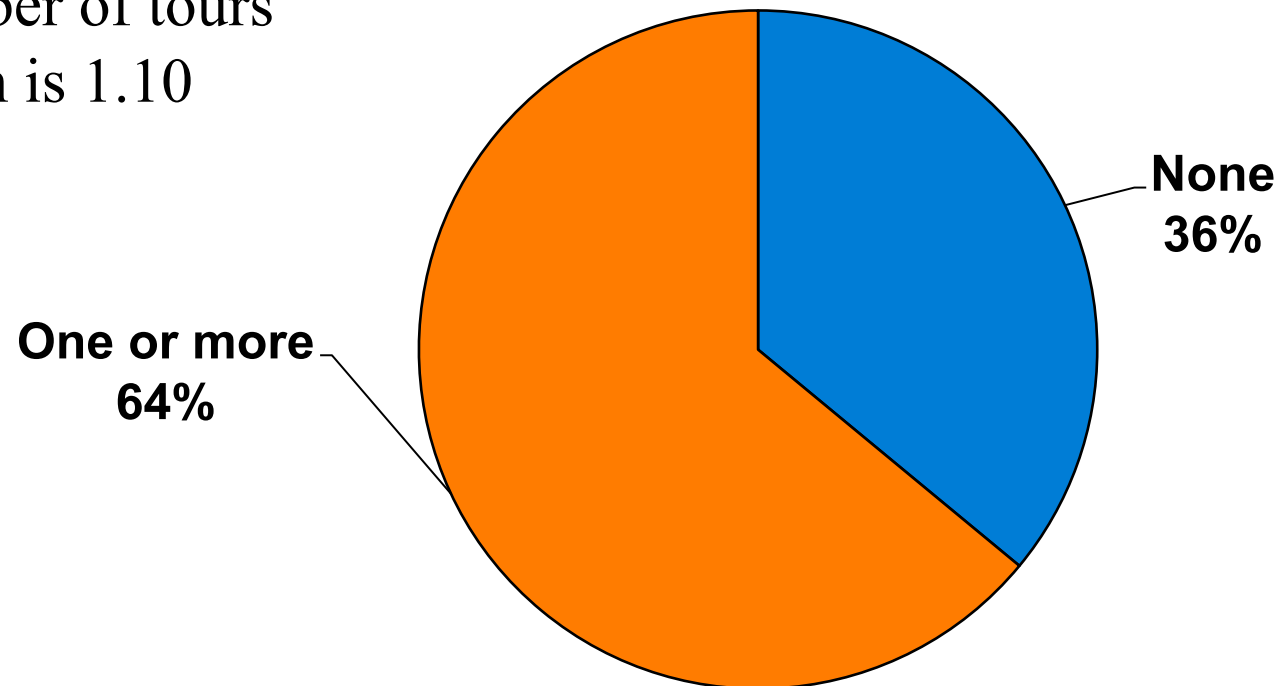
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

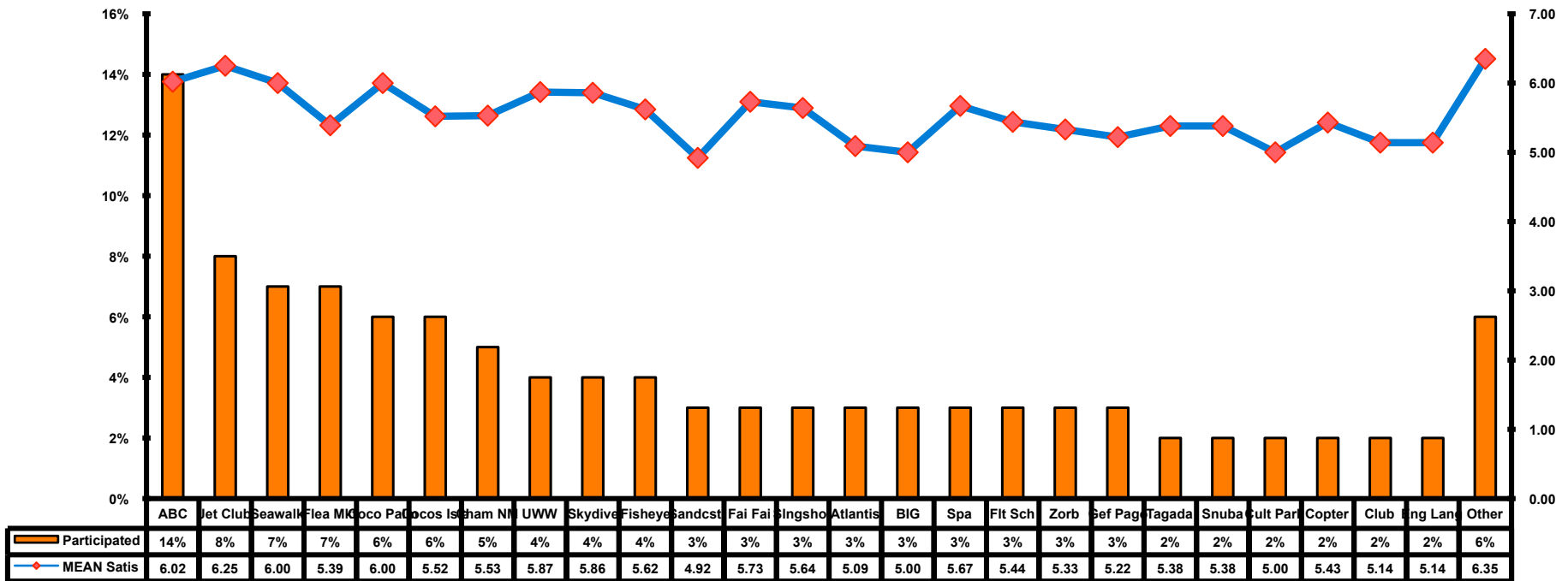
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 61%	Score of 6 to 7 = 57%
Score of 4 to 5 = 33%	Score of 4 to 5 = 35%
Score 1 to 3 = 6%	Score 1 to 3 = 8%
MEAN = 5.57	MEAN = 5.46

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 = 58%
Score of 4 to 5 = 36%	Score of 4 to 5 = 40%
Score 1 to 3 = 2%	Score 1 to 3 = 2%
MEAN = 5.58	MEAN = 5.58

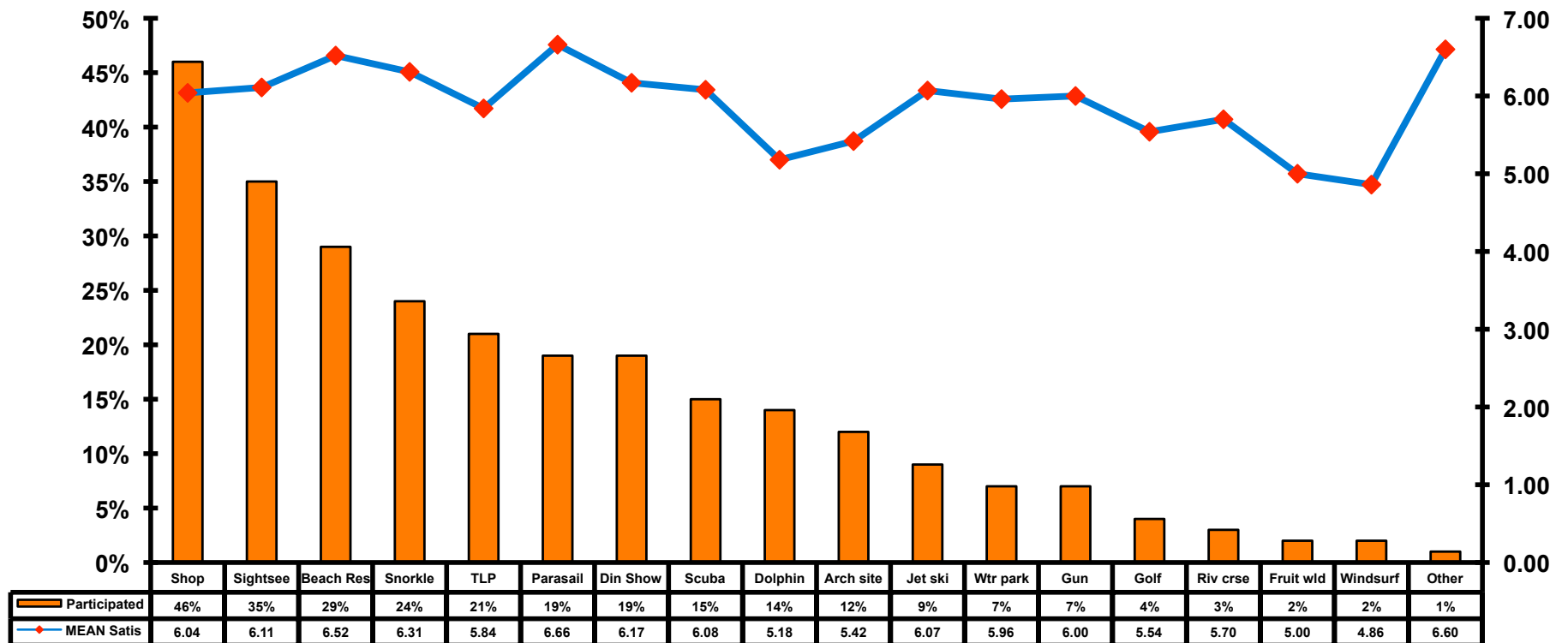
Night Tours Satisfaction

7pt Rating Scale

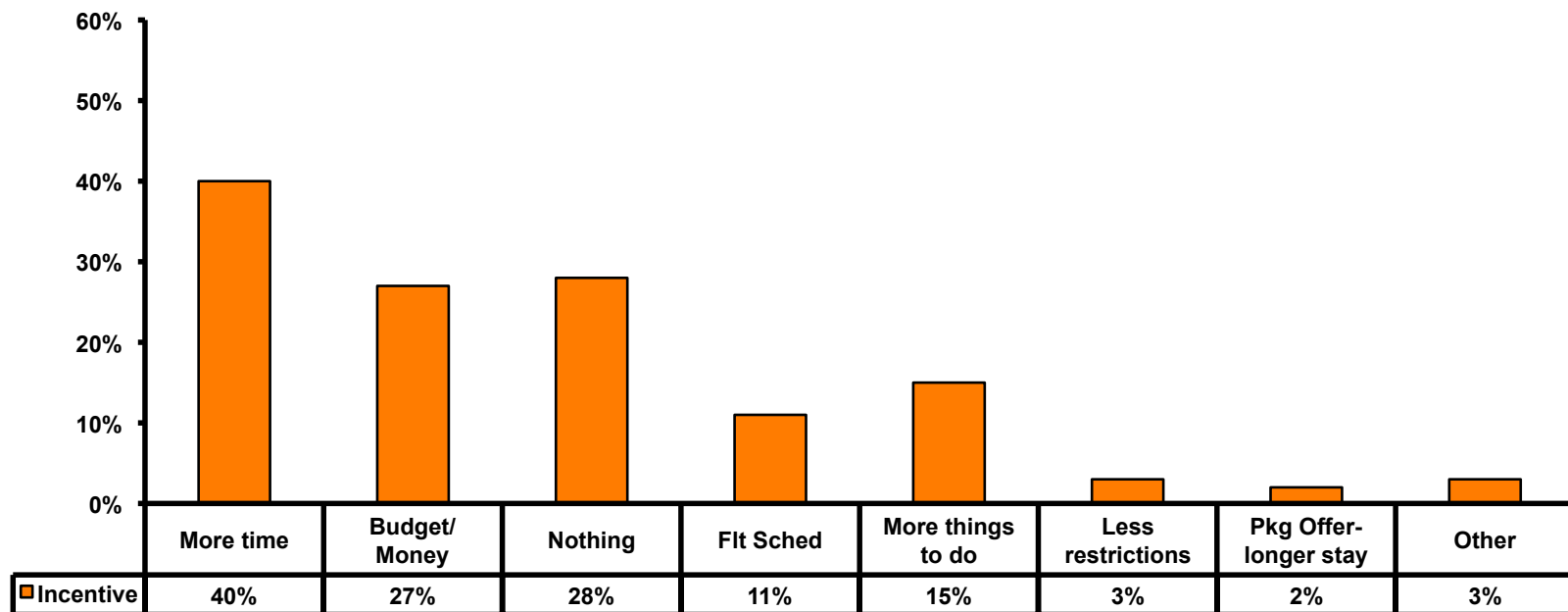
7=Very Satisfied/ 1=Very Dissatisfied

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 = 66%	Score of 4 to 5 = 66%
Score 1 to 3 = 2%	Score 1 to 3 = 1%
MEAN = 4.87	MEAN = 4.90

Satisfaction with Other Activities



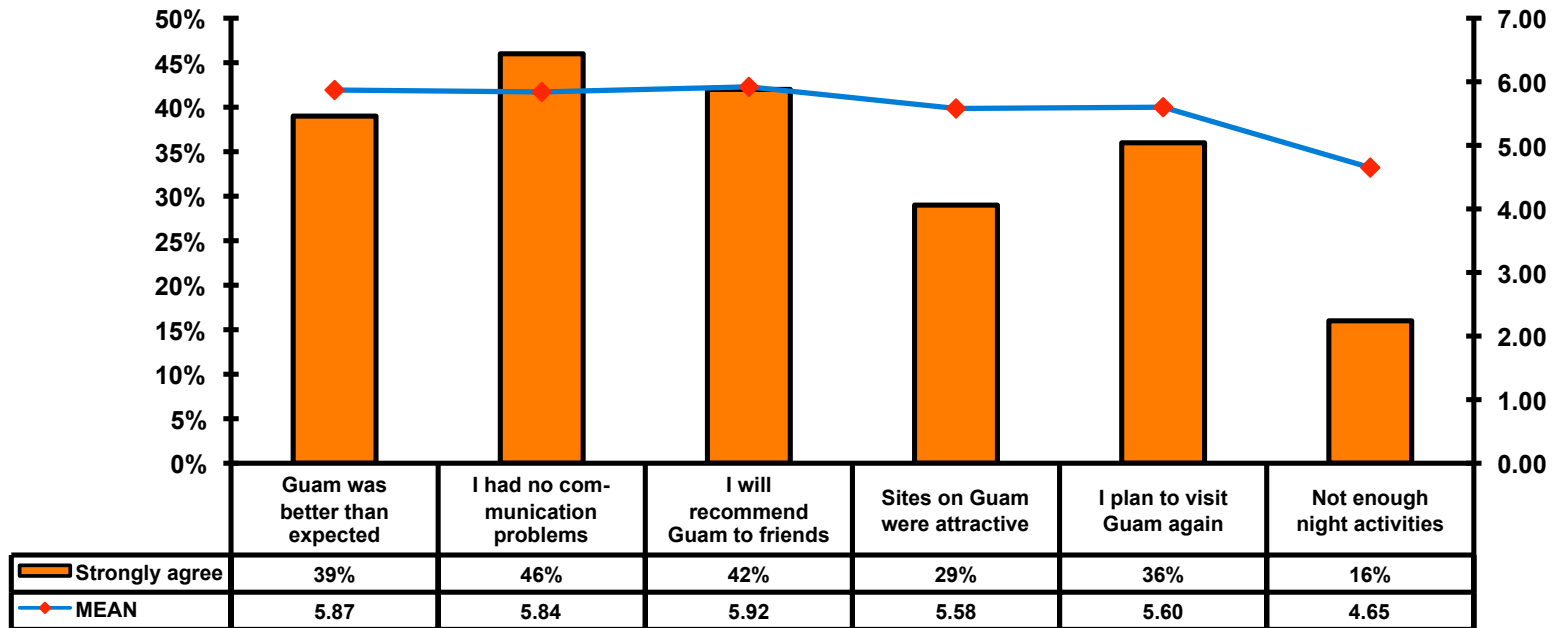
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

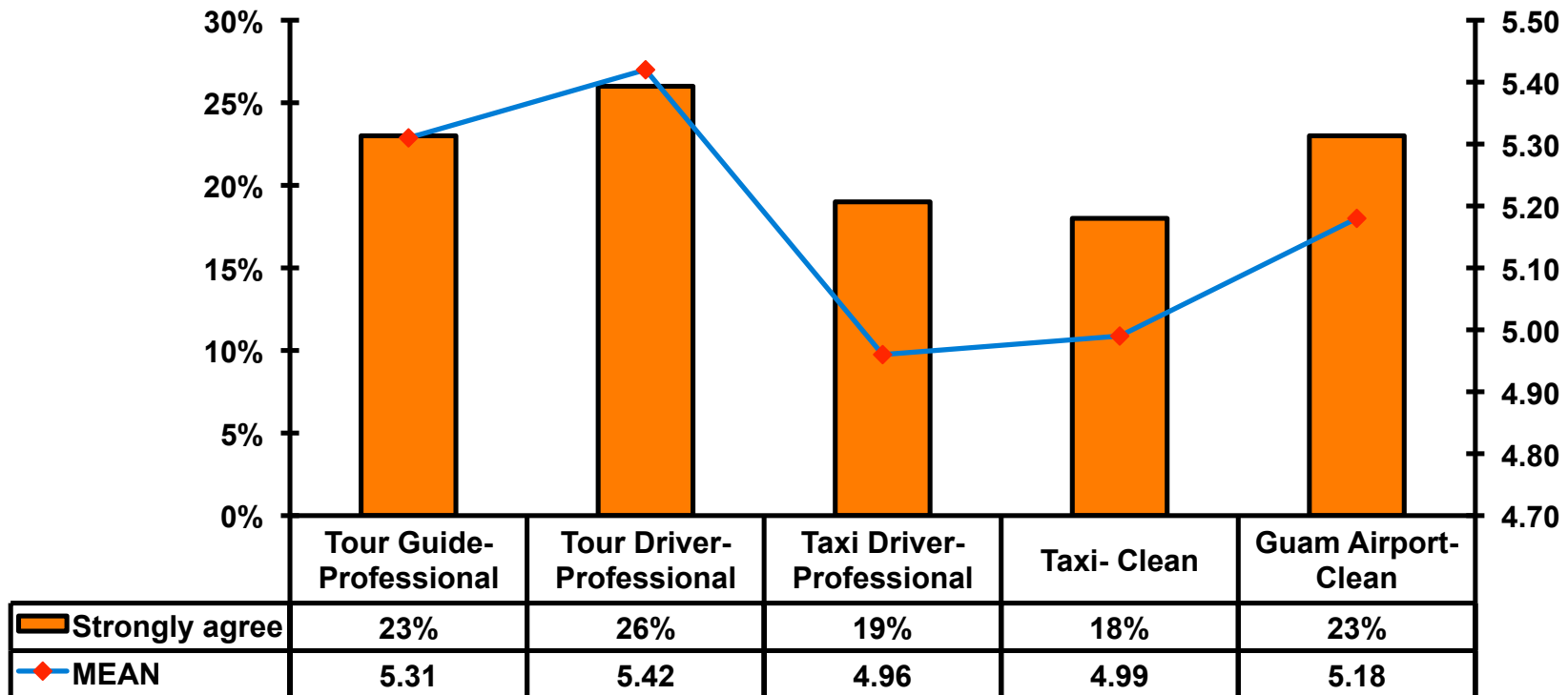
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

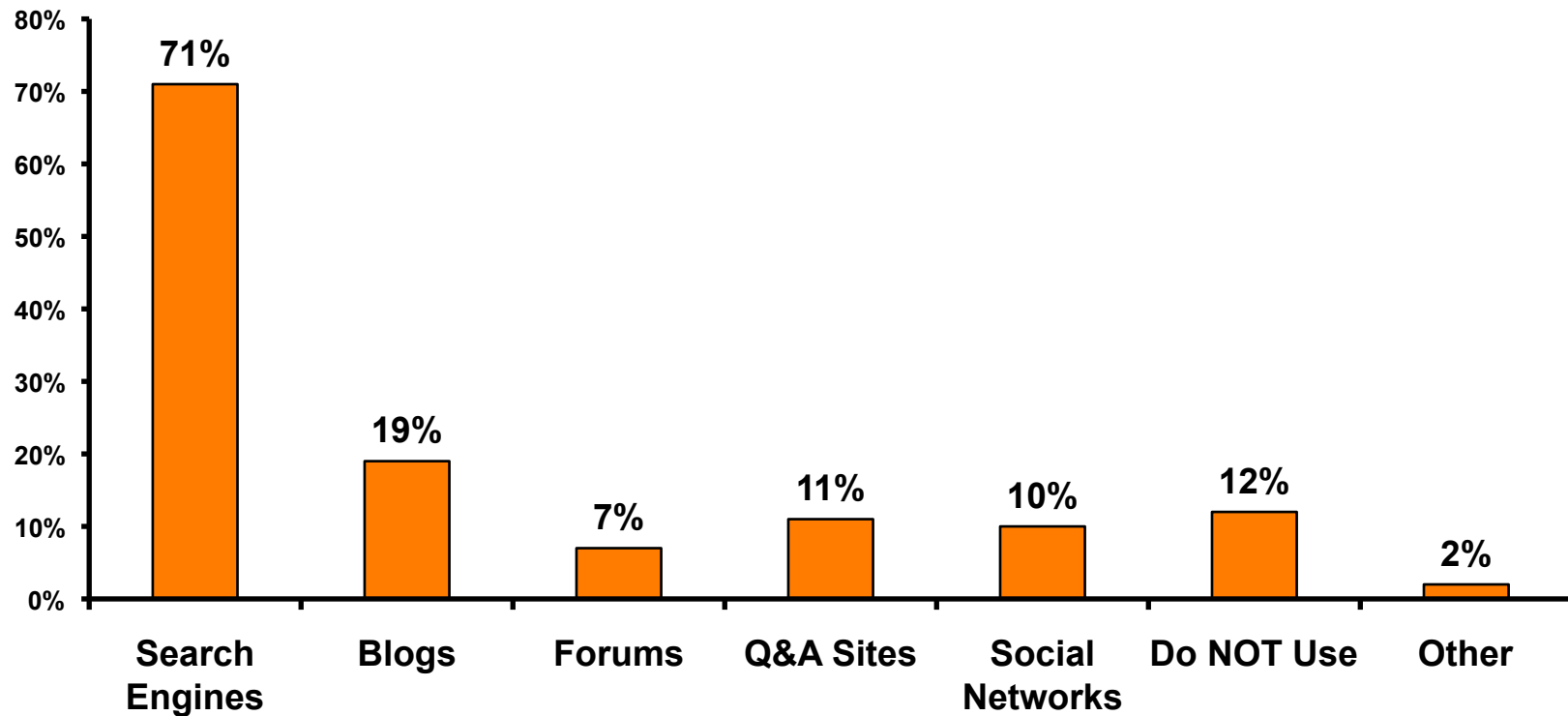
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



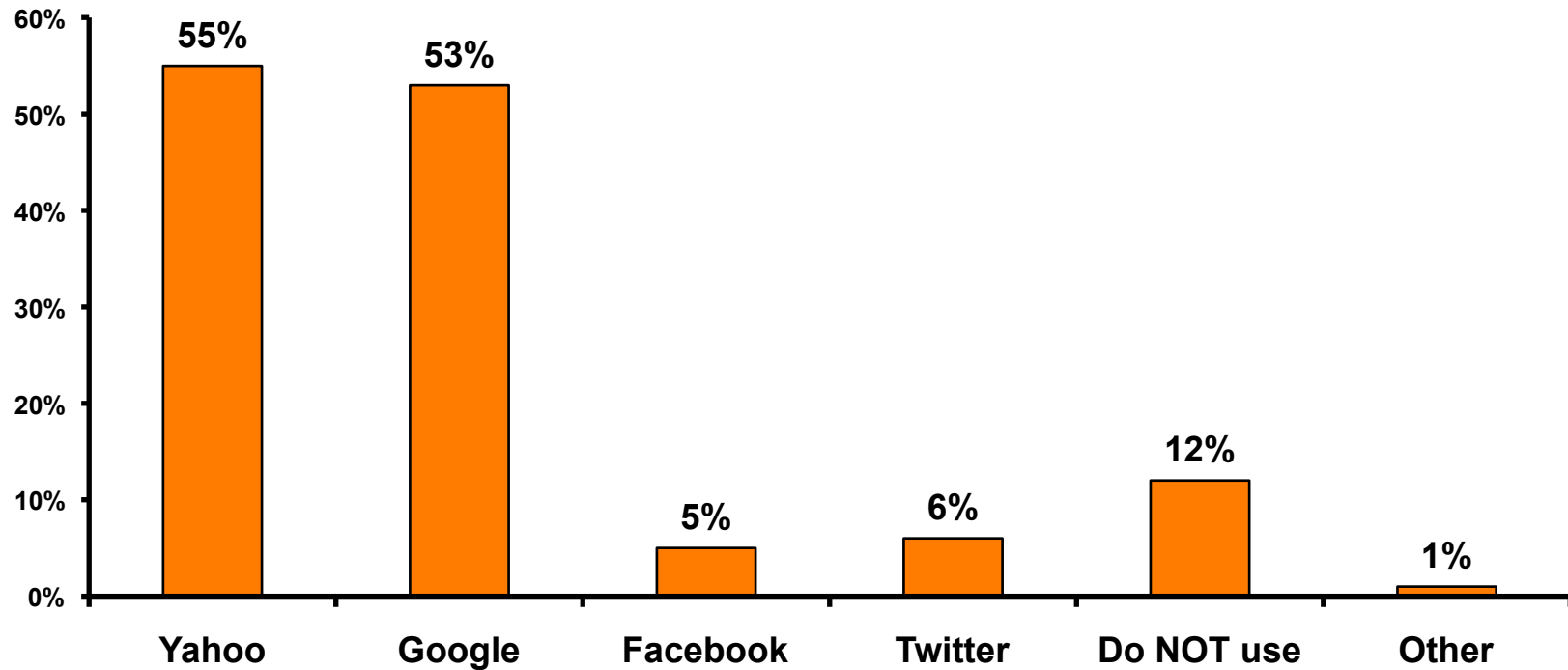
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

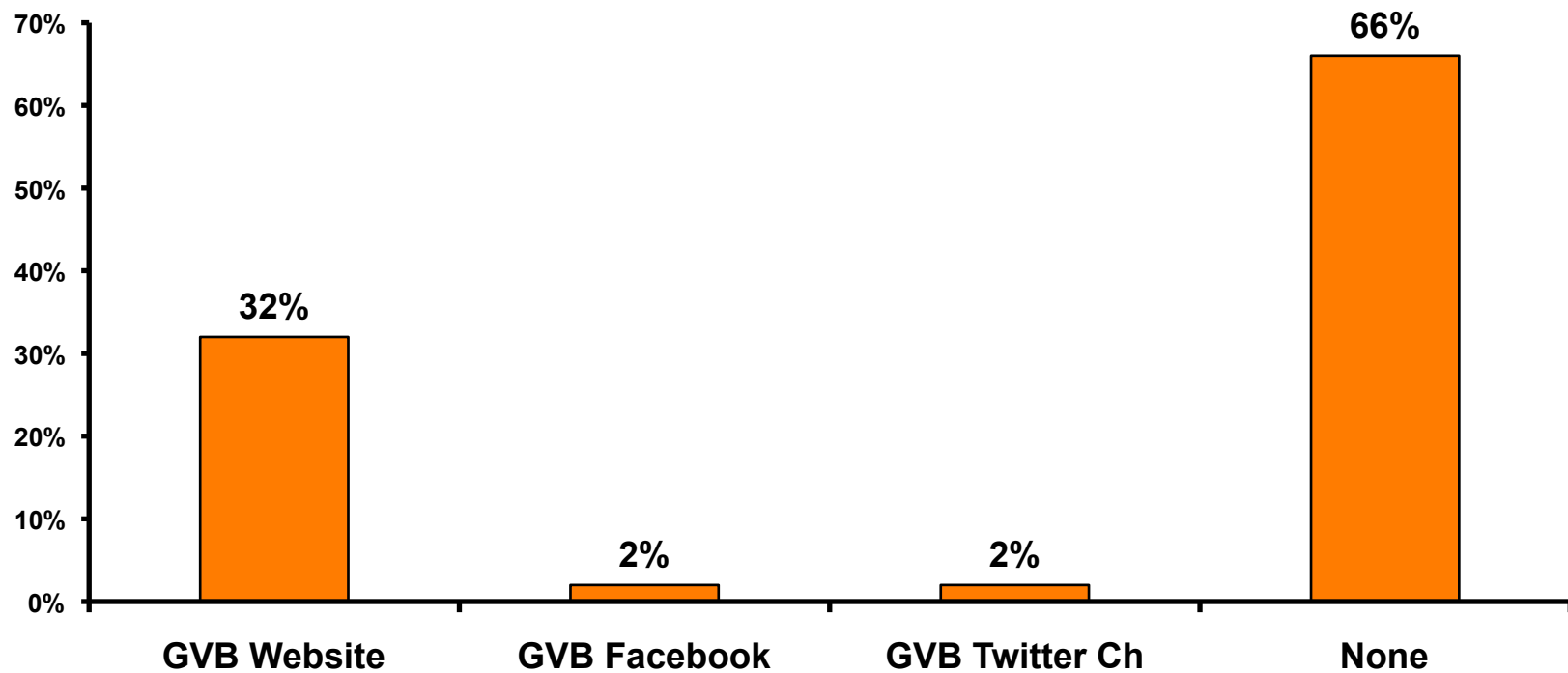


Internet- Things To Do

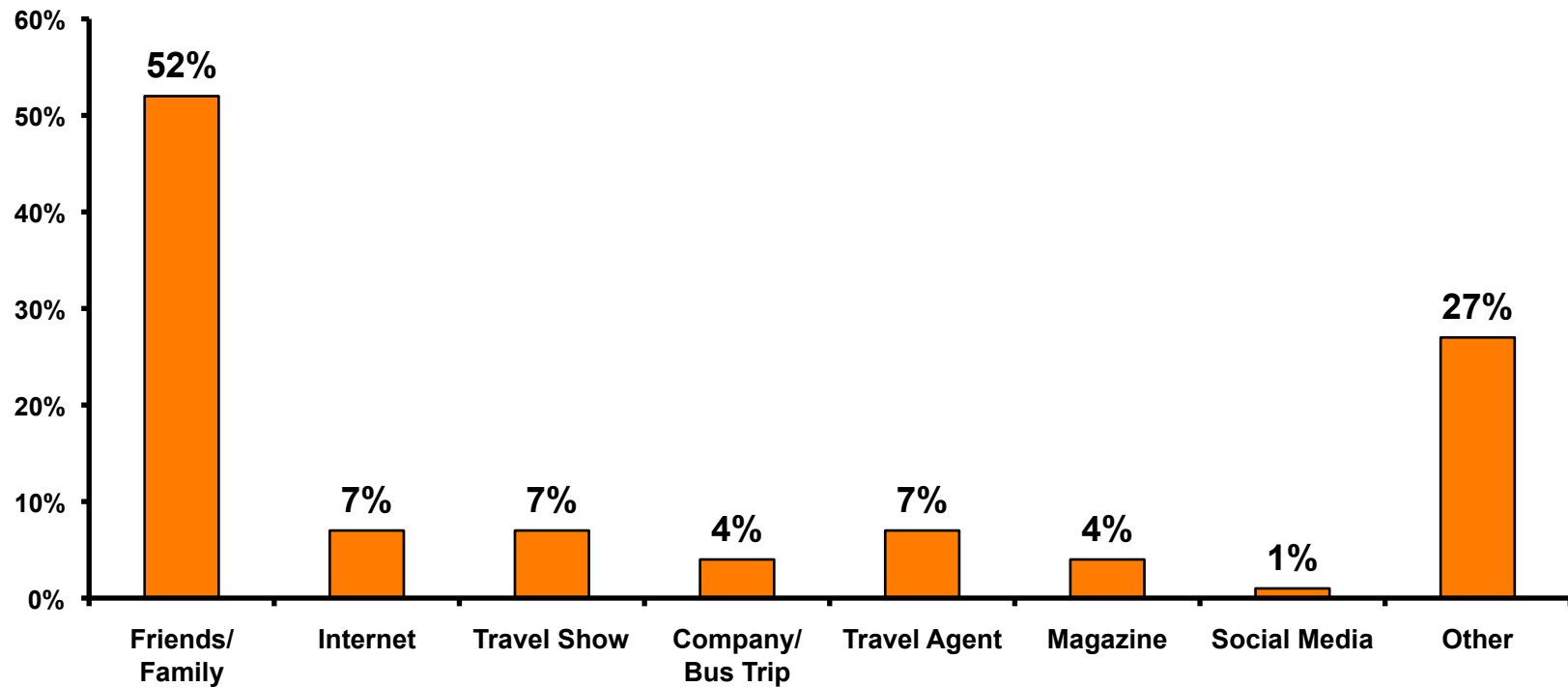
Sources of Info



Internet- GVB Sources

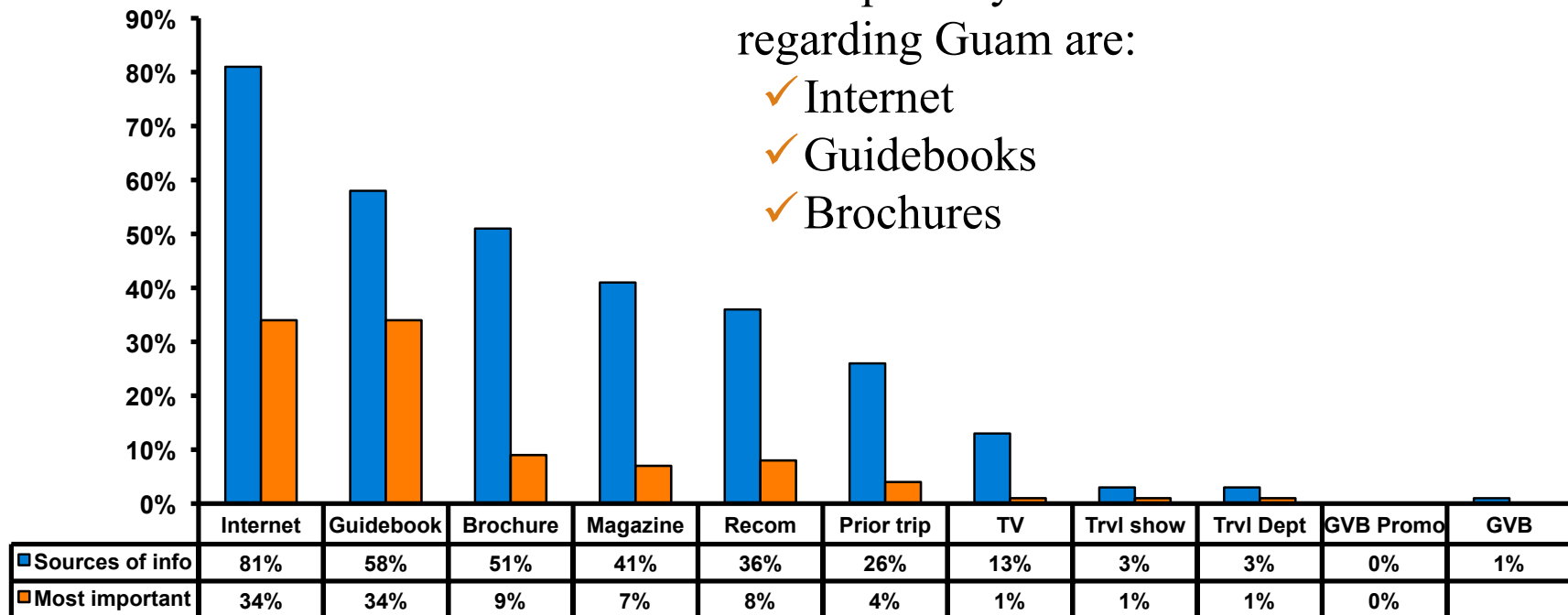


Travel Motivation- Info Sources



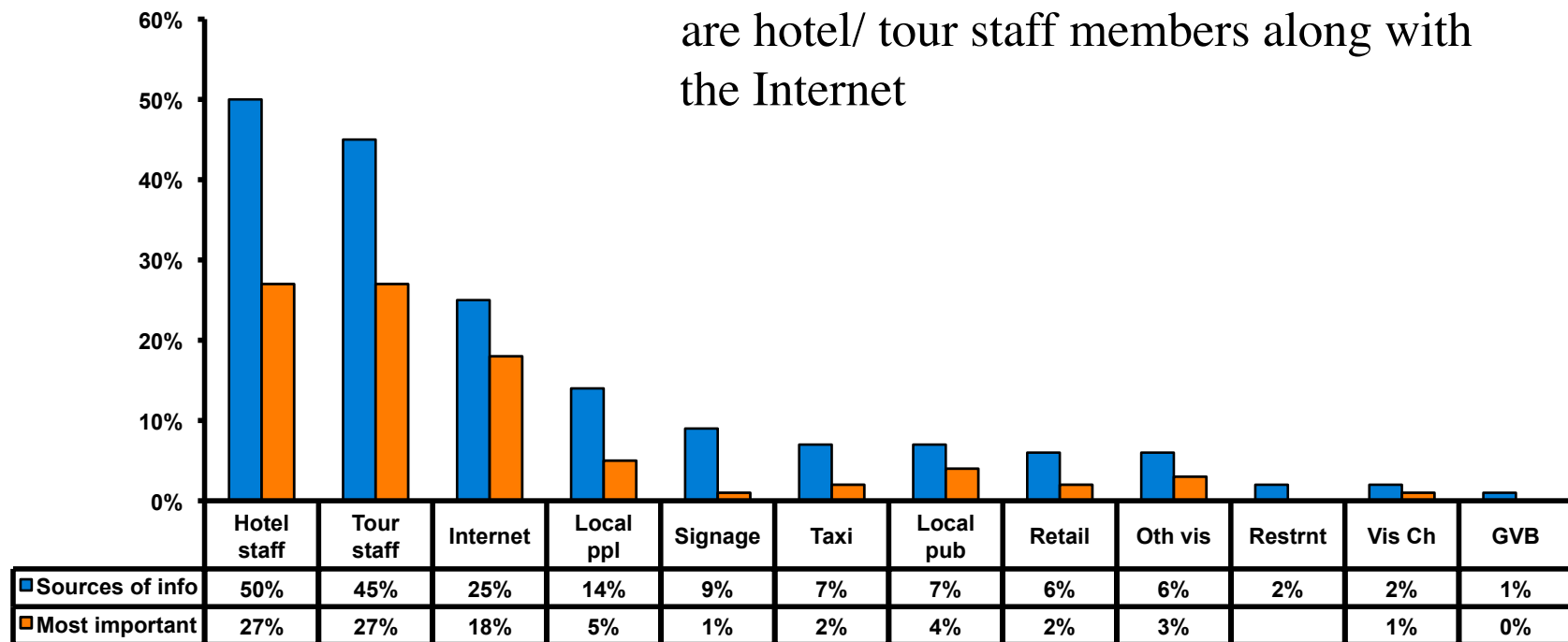
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

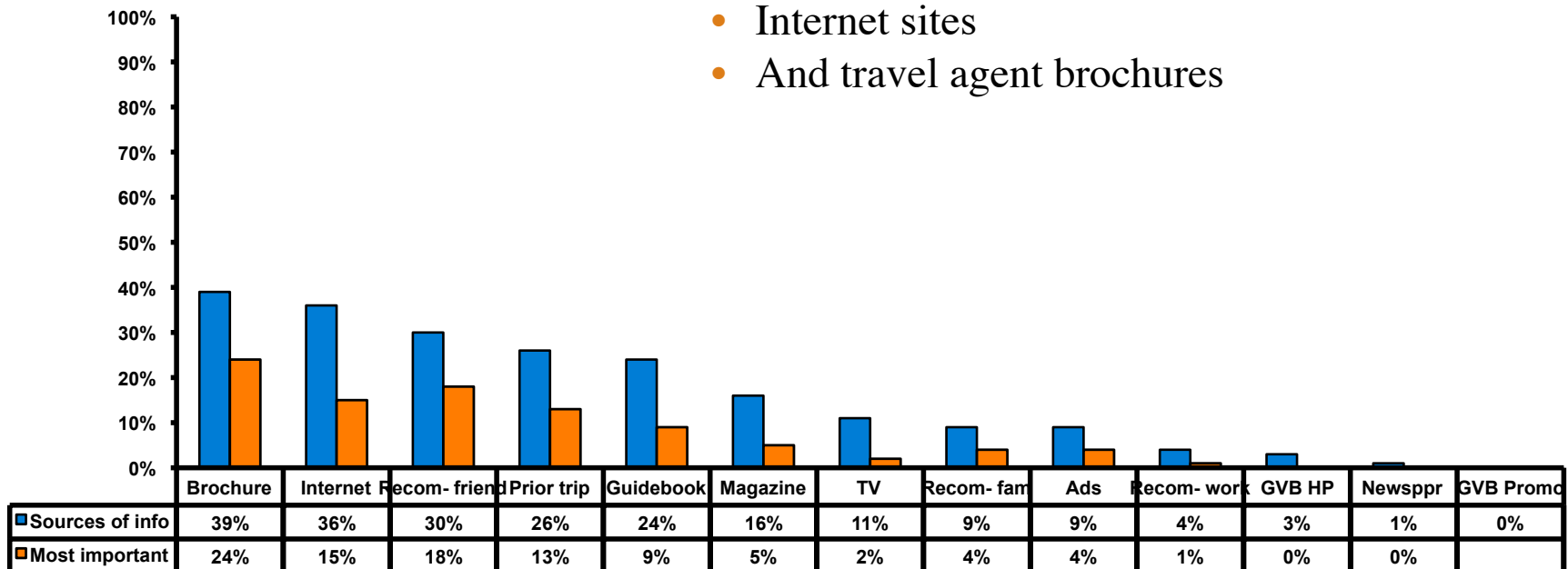
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

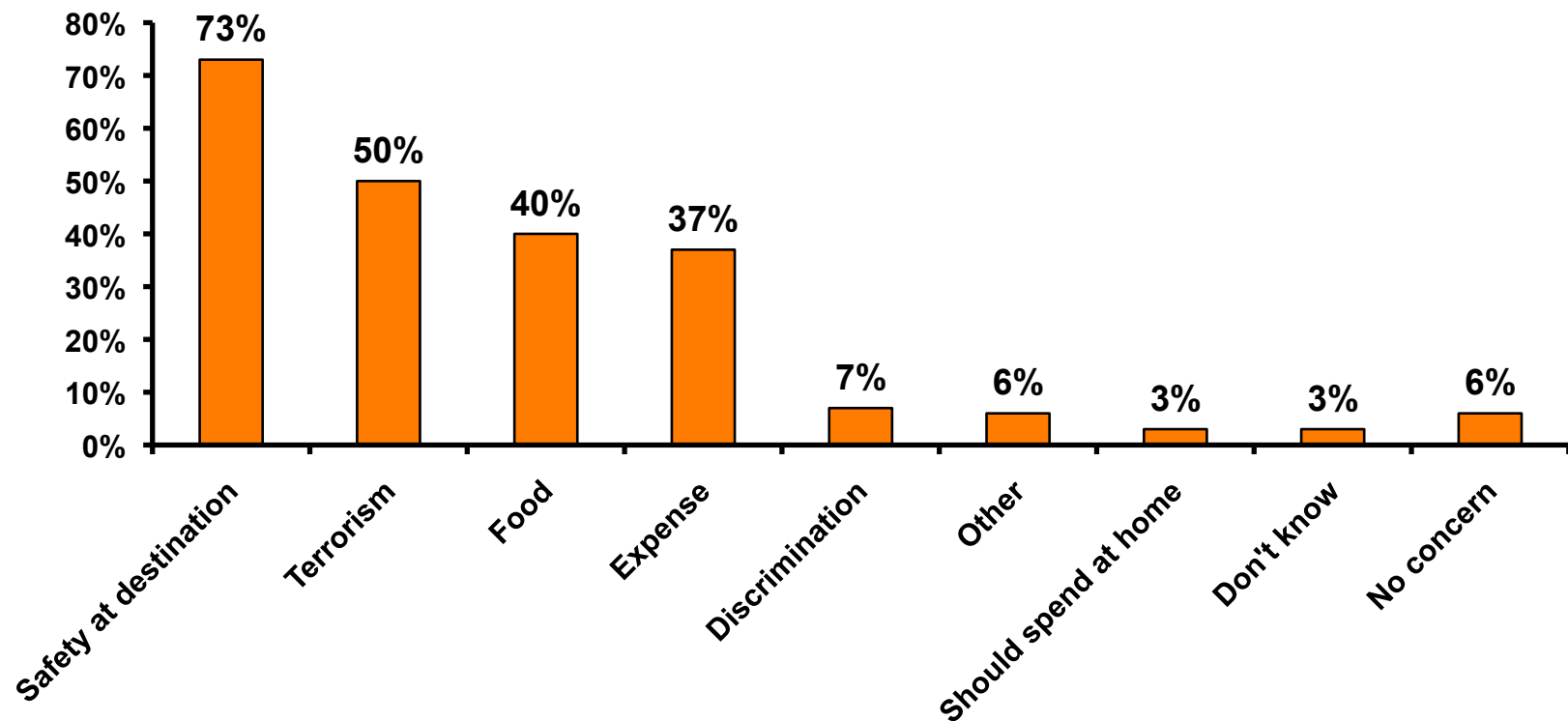
The primary motivational sources of information were.

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



SECTION 6 **OTHER ISSUES**

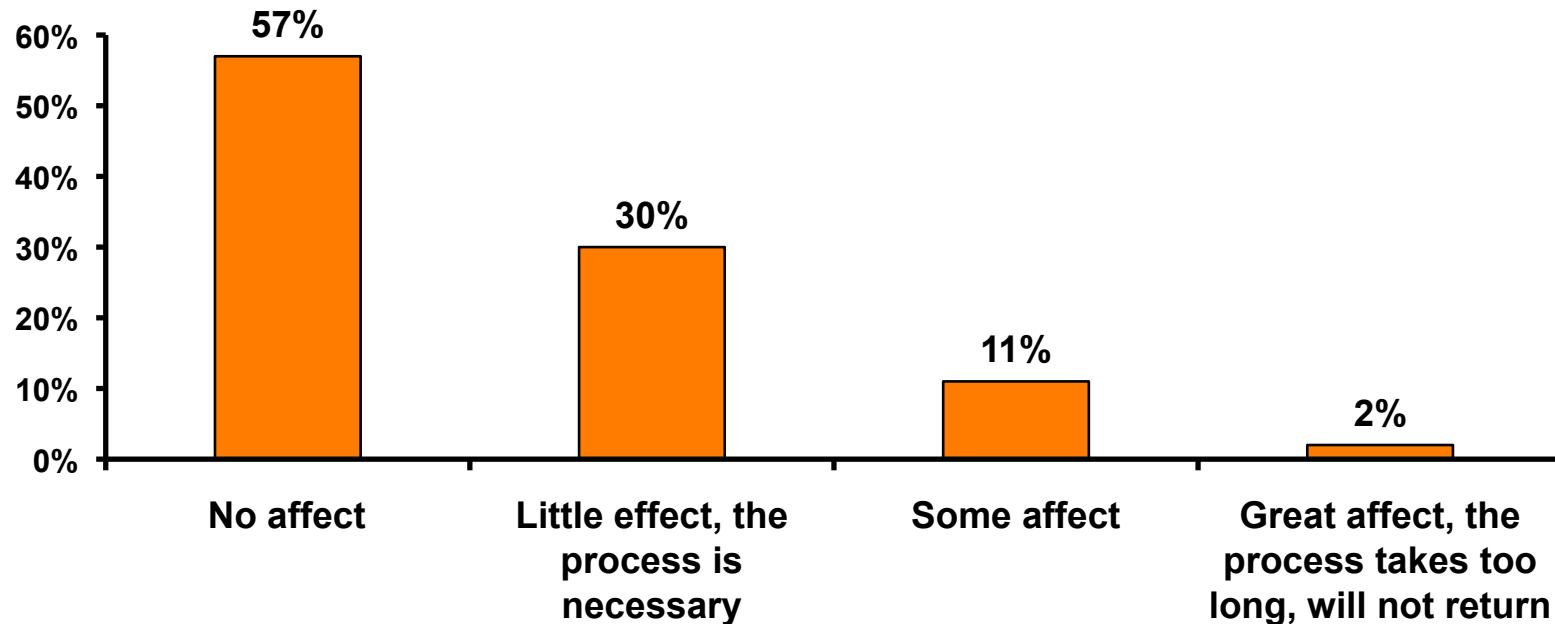
Concerns about travel outside of Japan - Overall



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	73%	72%	71%	75%	79%	72%	71%	76%	81%	73%	80%	64%	76%	
	Terrorism	50%	46%	52%	54%	68%	52%	44%	54%	60%	56%	58%	45%	41%	
	Food	40%	44%	42%	34%	21%	60%	29%	54%	48%	52%	35%	27%	35%	
	Expense	37%	36%	41%	34%	16%	36%	39%	46%	29%	44%	35%	42%	24%	
	Discrimination against Japanese	7%	6%	9%	9%		8%	10%	14%	4%	2%	5%	18%	6%	
	Other	6%	8%	4%	5%	5%	4%	15%	3%	2%	6%	10%	3%	6%	
	No concerns	6%	5%	6%	5%	5%	12%	7%	5%	2%		3%	9%	6%	
	Should spend at home	3%	4%	3%	2%		8%	2%	3%		6%	3%		12%	
	Don't know	3%	3%	2%	5%						2%			6%	
	Total	Count	351	158	114	56	19	25	41	37	48	48	40	33	17

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

