



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2013

### MAY 2013



**Prepared by: QMark Research**

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# Background & Methodology

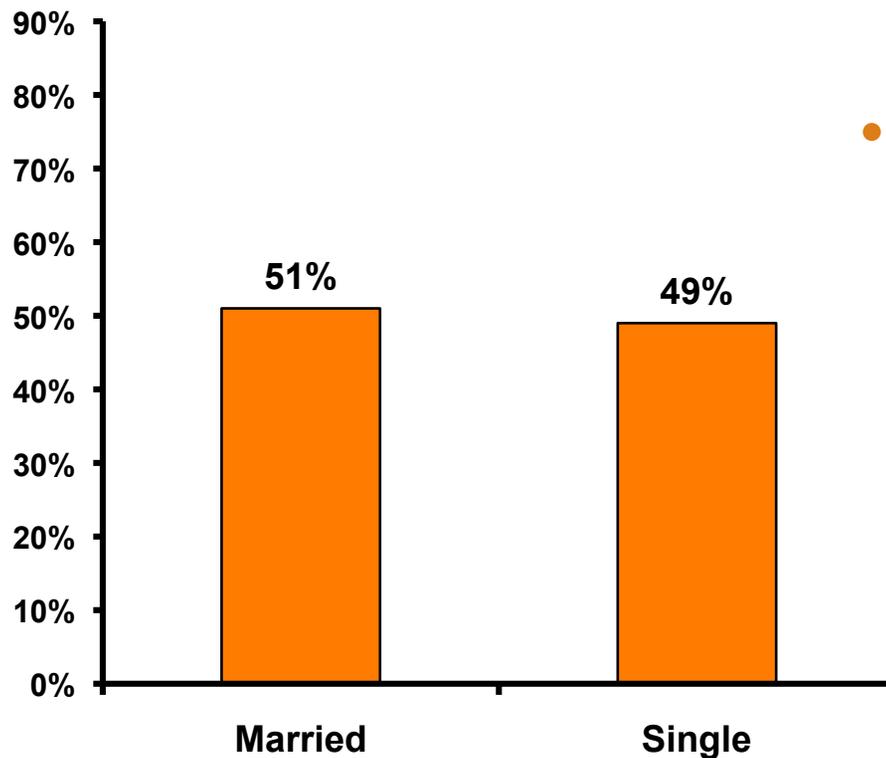
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **352** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.23 percentage points.

# Objectives

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

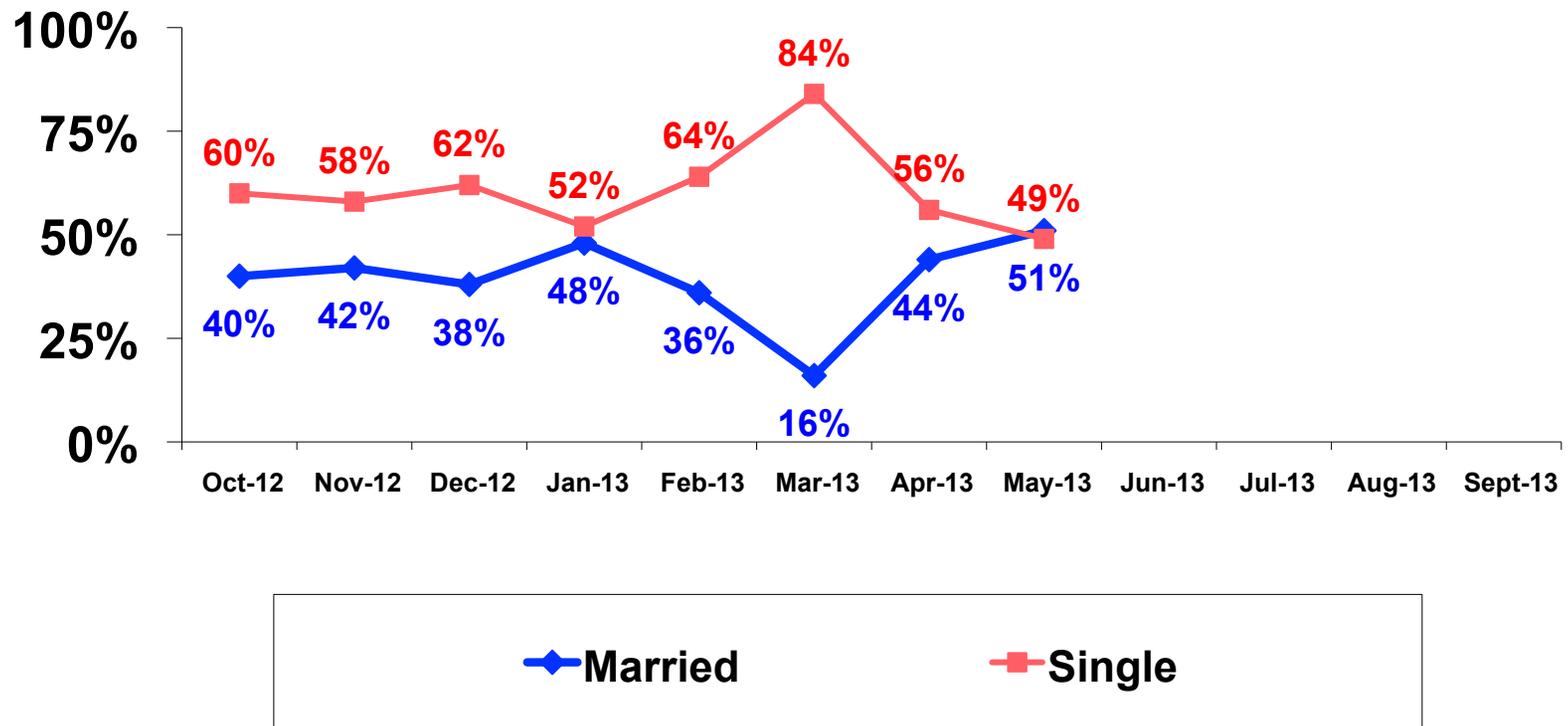
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

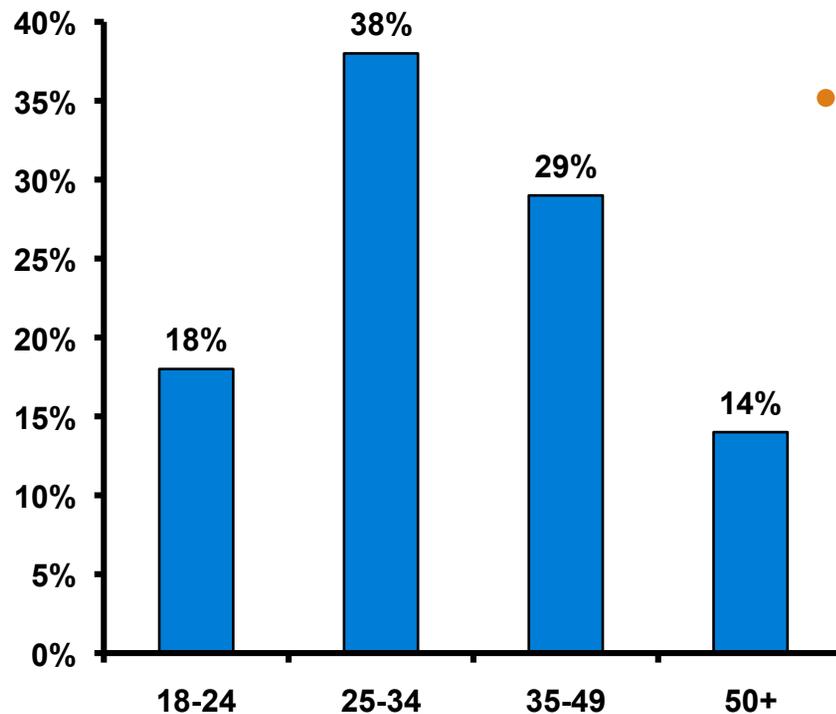


- 66% of female visitors are single.

# Marital Status

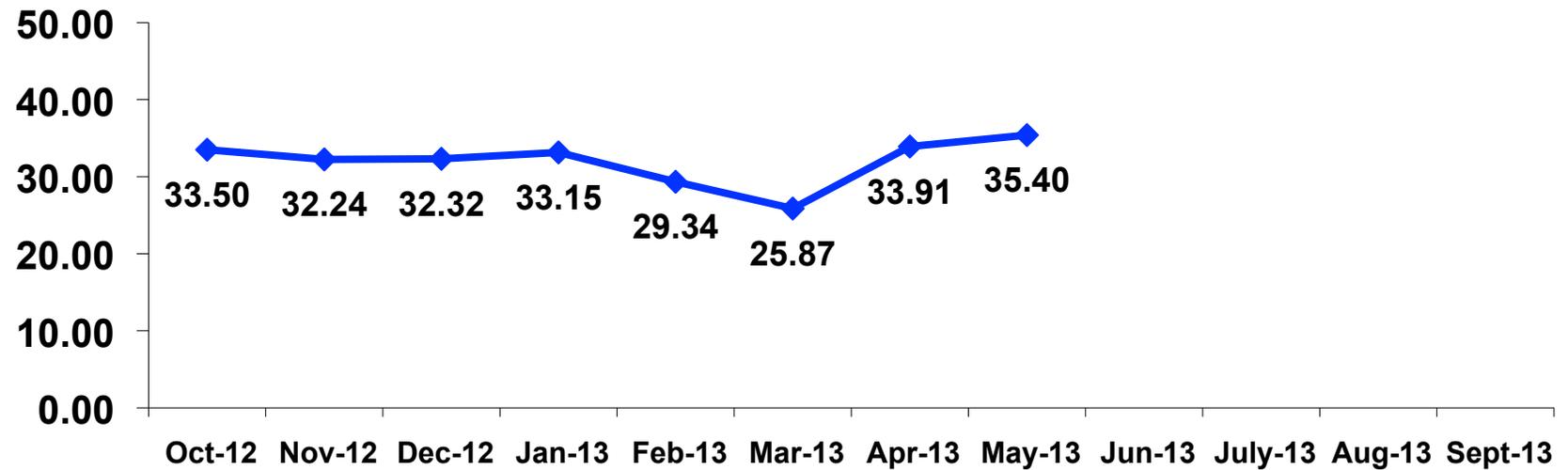


# Age - Overall

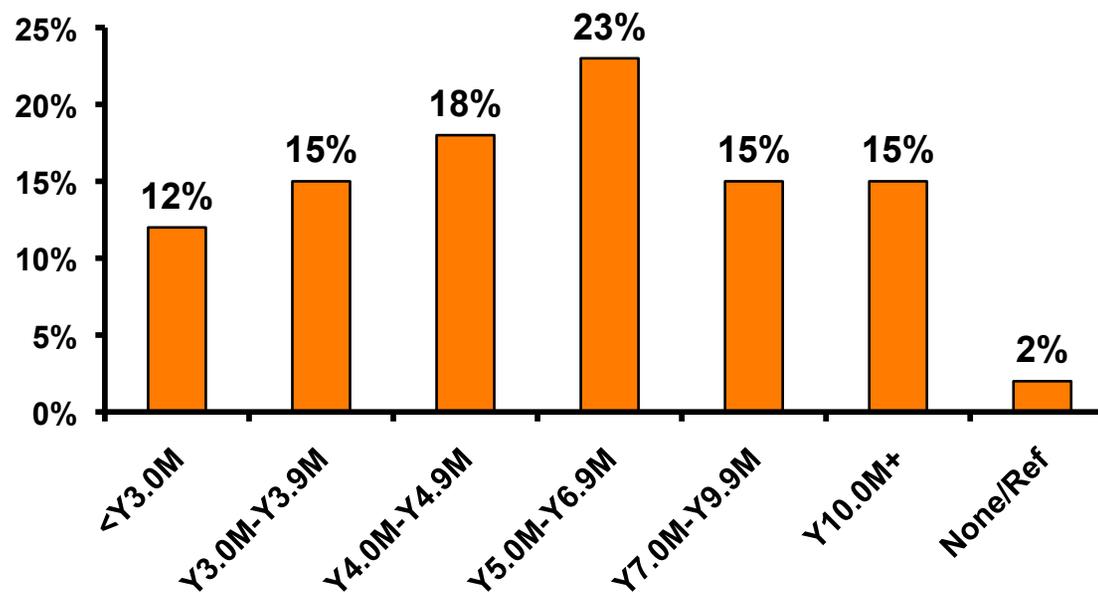


- The average age of the respondents is 35.40 years of age.

# Average Age

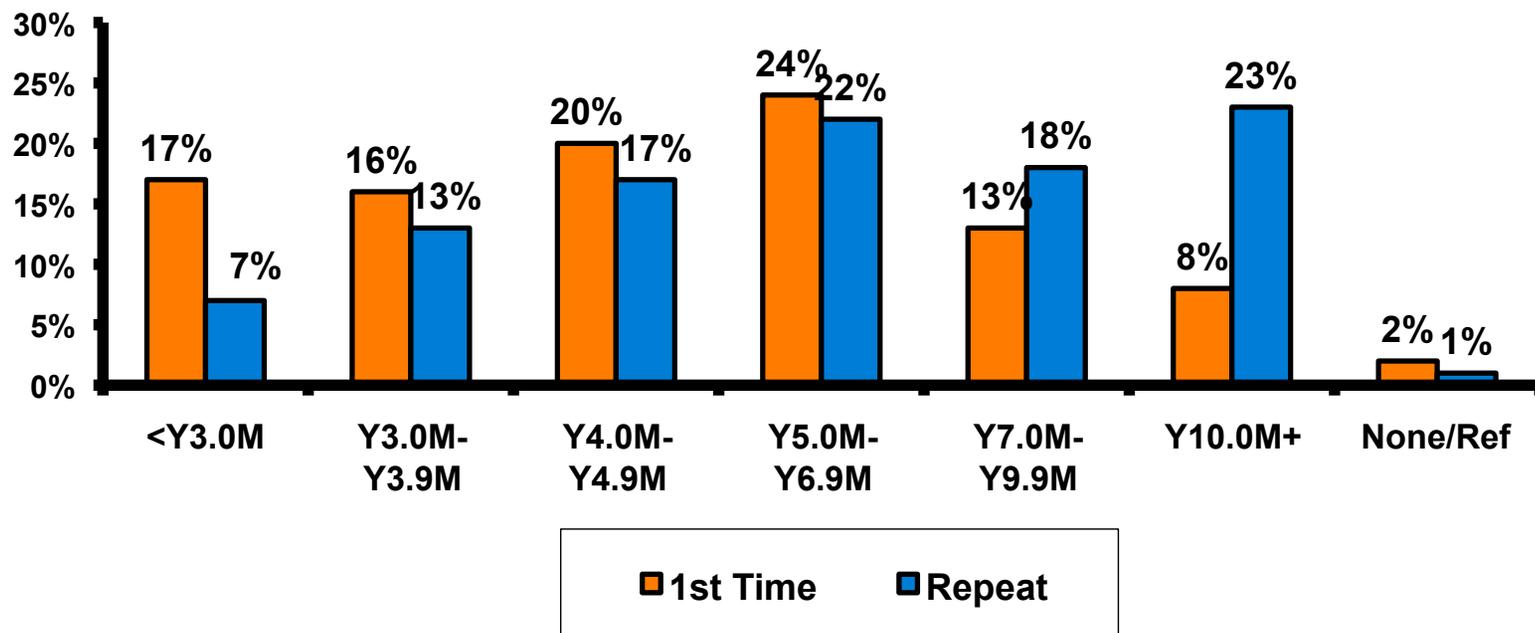


# Personal Income



• ¥100.33=\$1

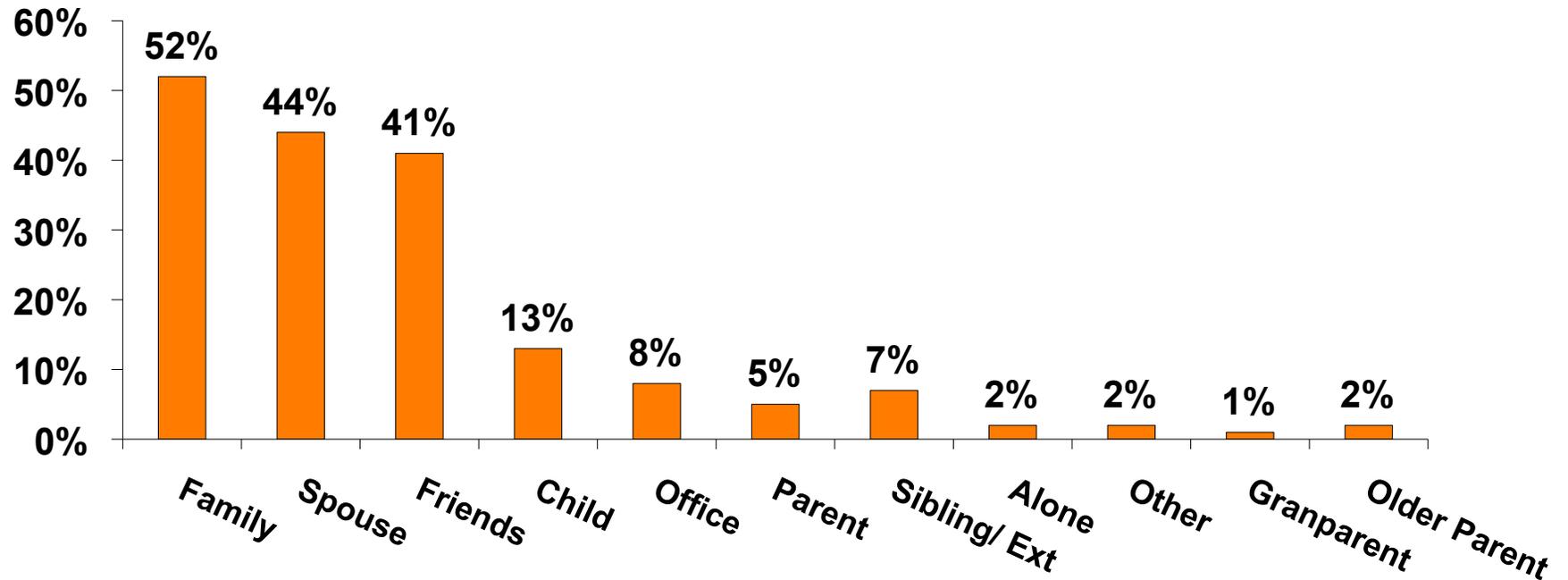
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	12	5	7	4	4	2	2
		Column N %	4%	3%	6%	8%	4%	2%	4%
	Y2.0M-Y3.0M	Count	25	10	15	7	14	3	1
		Column N %	8%	5%	12%	14%	13%	3%	2%
	Y3.0M-Y4.0M	Count	46	21	25	9	19	13	4
		Column N %	15%	11%	20%	18%	17%	13%	8%
	Y4.0M-Y5.0M	Count	57	41	16	11	25	14	7
		Column N %	18%	22%	13%	22%	22%	14%	14%
	Y5.0M-Y7.0M	Count	71	47	24	6	33	19	13
		Column N %	23%	25%	20%	12%	29%	19%	27%
	Y7.0M-Y10.0M	Count	48	29	19	6	9	23	10
		Column N %	15%	15%	16%	12%	8%	23%	20%
	Y10.0M+	Count	47	34	13	5	7	24	11
		Column N %	15%	18%	11%	10%	6%	24%	22%
	No Income	Count	5	2	3	2	1		1
		Column N %	2%	1%	2%	4%	1%		2%
	Total	Count	311	189	122	50	112	98	49

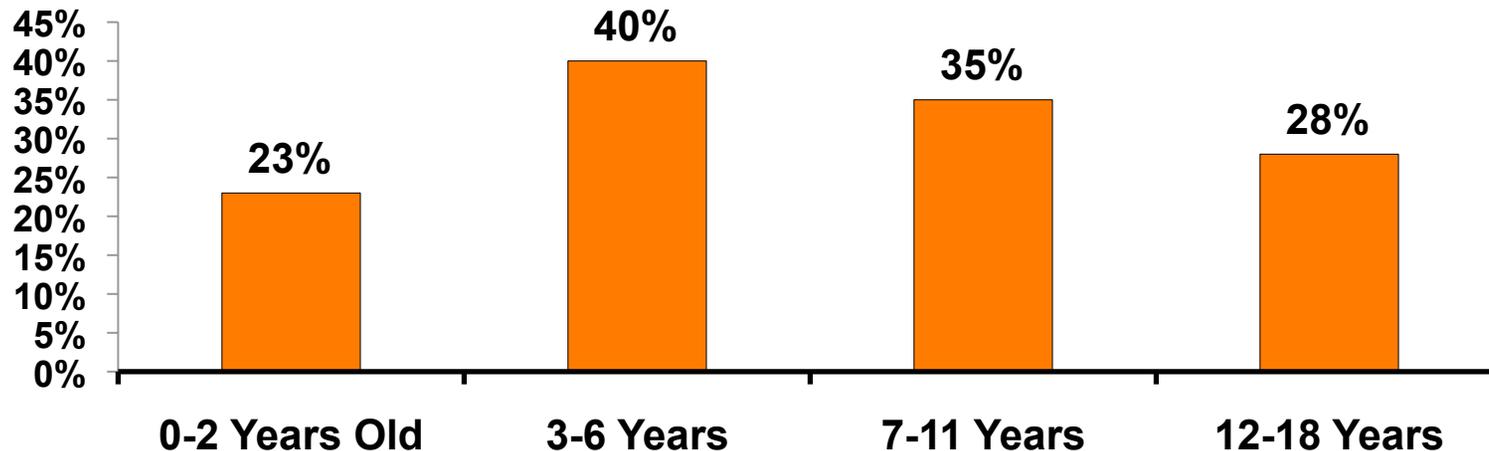
# Travel Companions



# Number of Children Travel Party

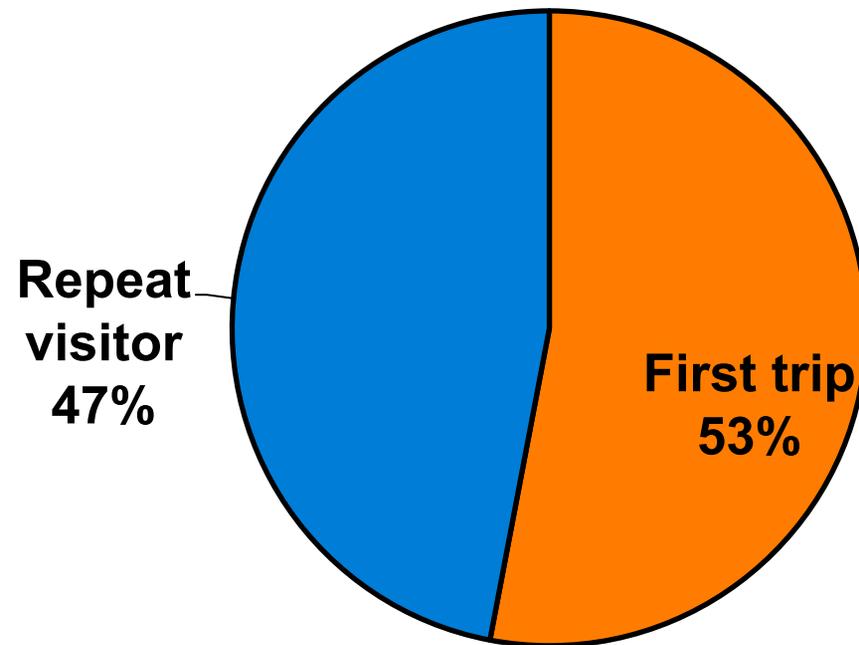
N=43 total respondents traveling with children.

(Of those N=43 respondents, there is a total of 59 children 18 years or younger)

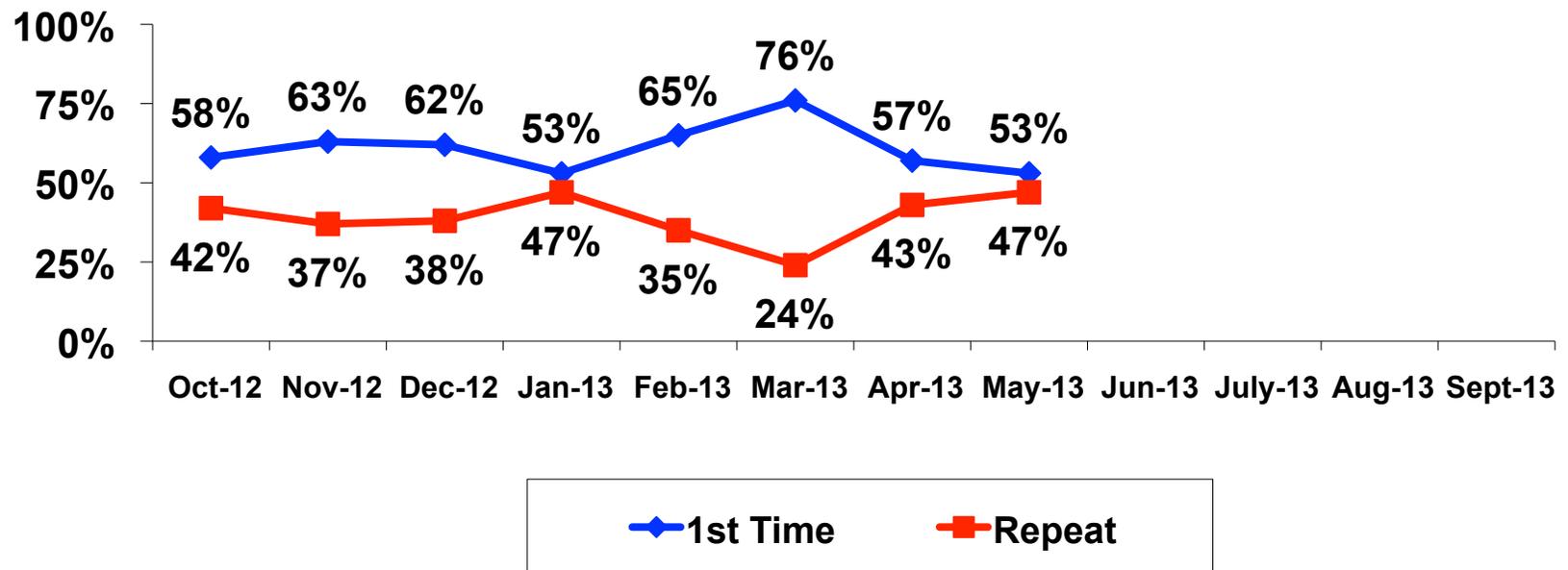


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# Prior Trips to Guam



# Prior Trips to Guam



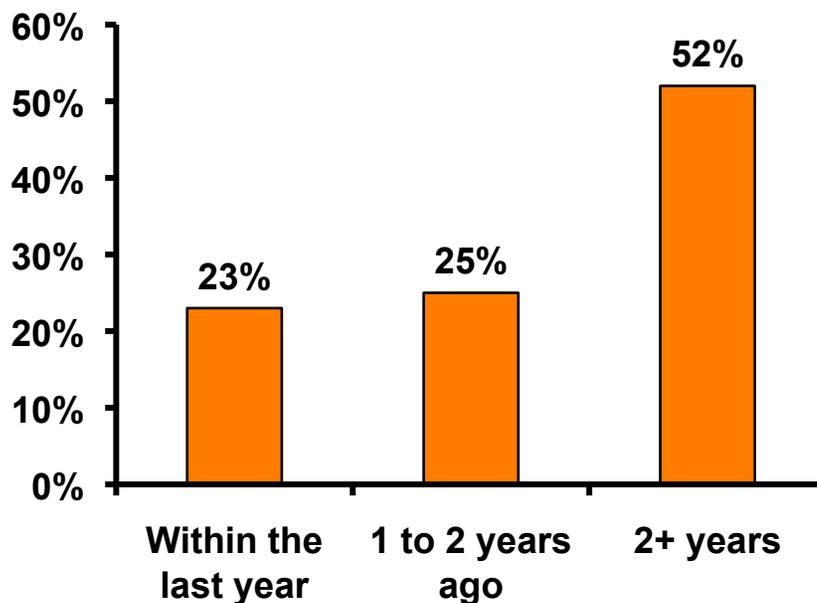
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	200	98	102
		Column N %	57%	52%	62%
	Female	Count	152	89	63
		Column N %	43%	48%	38%
	Total	Count	352	187	165
AGE	18-24	Count	64	50	14
		Column N %	18%	27%	9%
	25-34	Count	133	77	56
		Column N %	38%	41%	34%
	35-49	Count	103	34	69
		Column N %	29%	18%	42%
	50+	Count	50	25	25
		Column N %	14%	13%	15%
	Total	Count	350	186	164

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

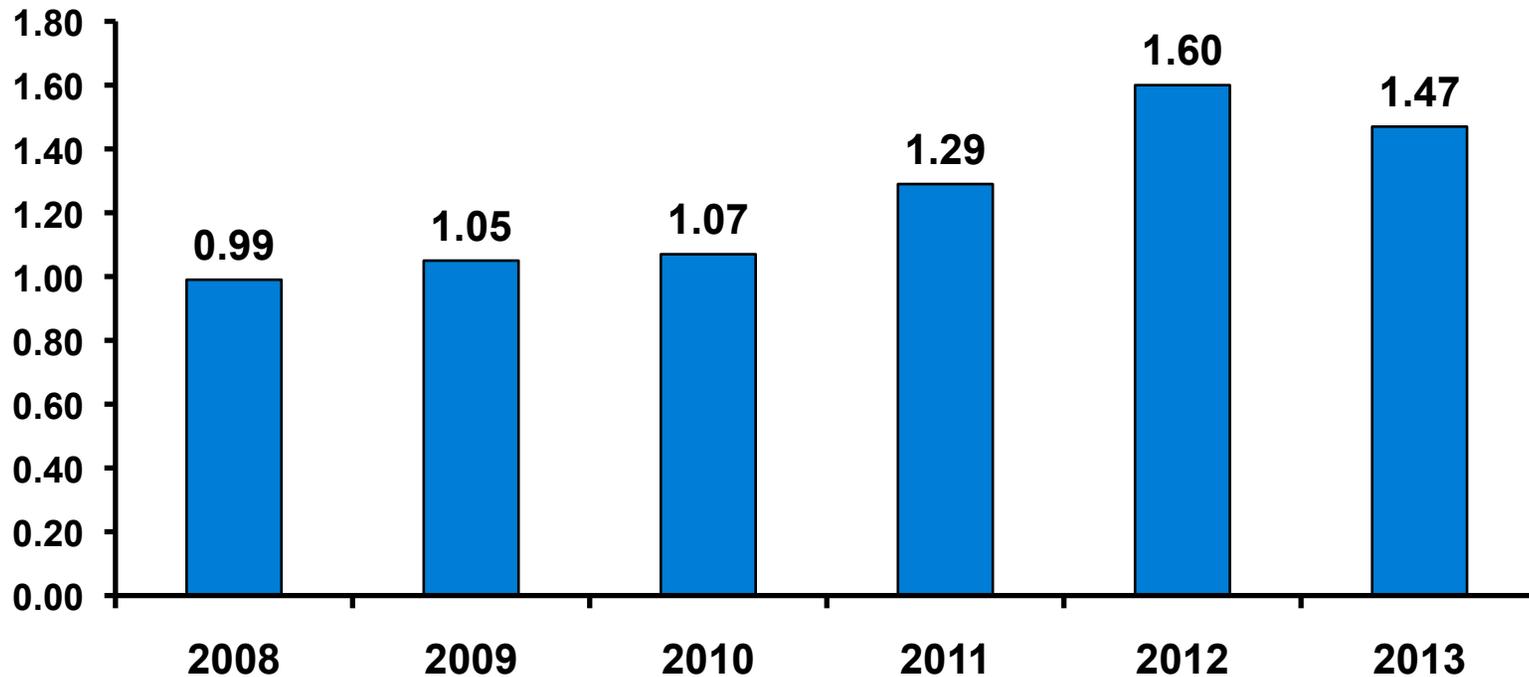
# Repeat Visitors Last Trip

n = 165



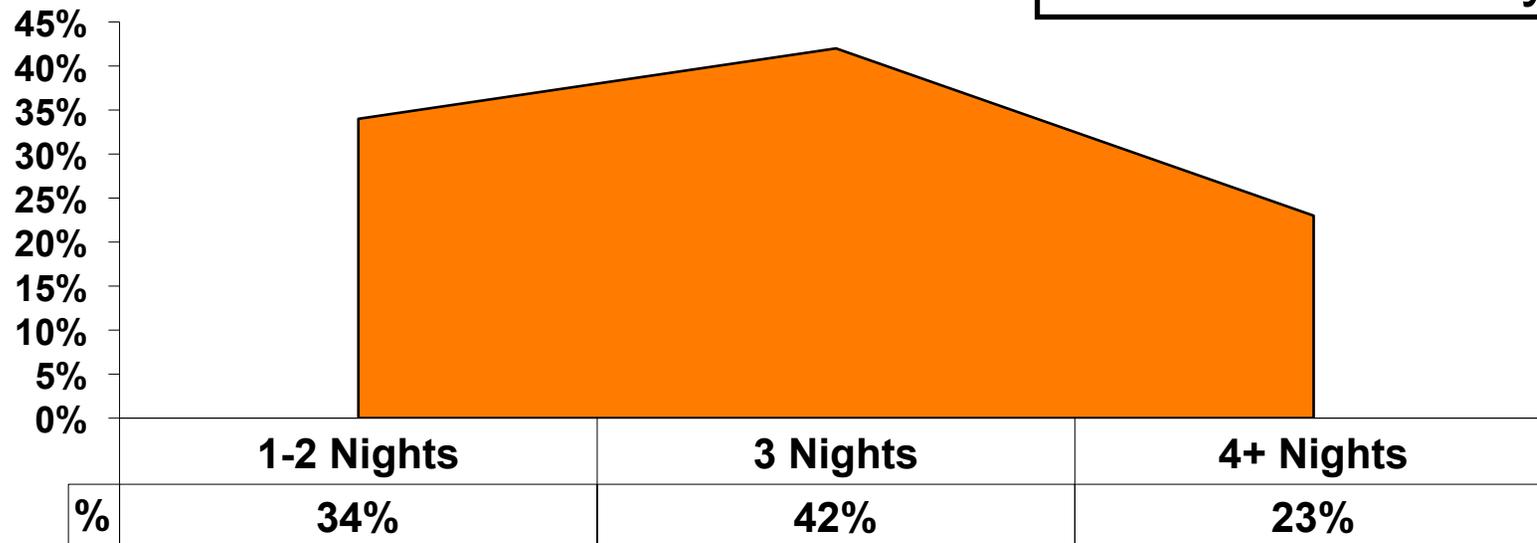
- The average repeat visitor has been to Guam 3.43 times.
- Less than half the repeat visitors have been to Guam within the last 2 years.

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

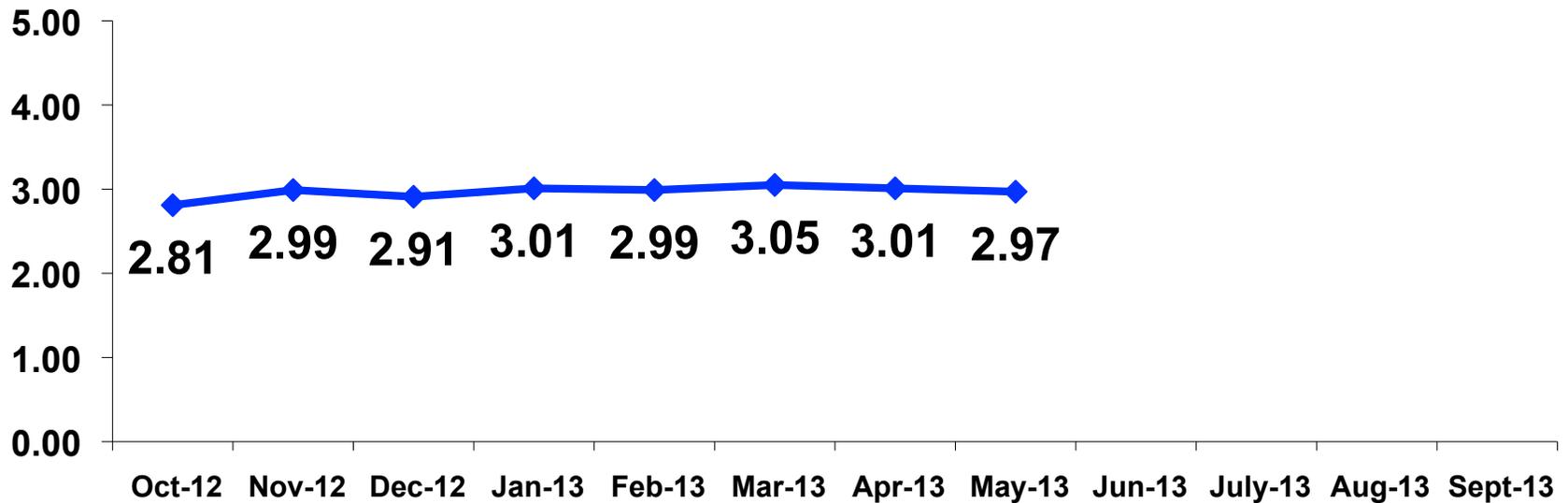


# Length of Stay

Mean = 2.97 Days  
Median = 3.0 Days



# Average Length of Stay

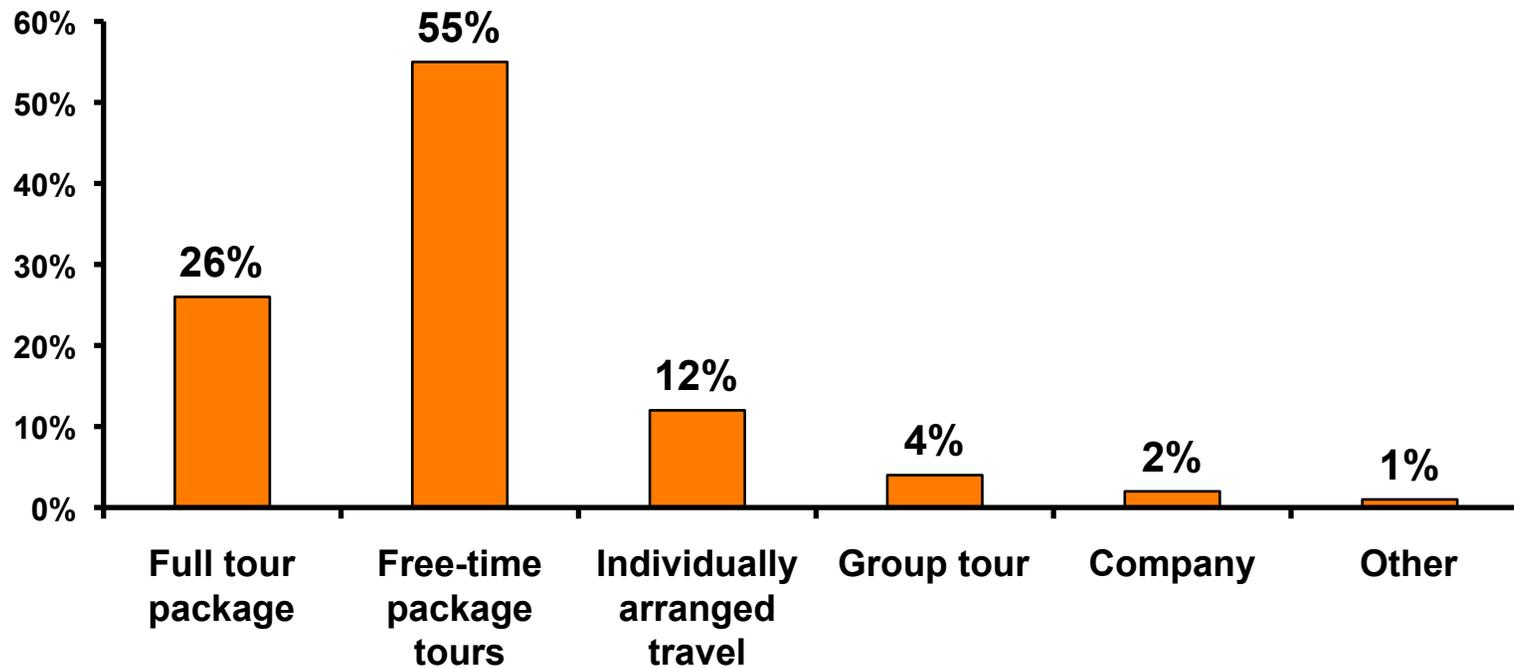


# Occupation by Income

	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+
Q25 Office worker non-mgr	17%	8%	24%	28%	14%	18%	19%	9%	
Engineer	15%		20%	17%	25%	20%	6%	6%	
Salesperson	15%	17%	4%	11%	18%	20%	19%	11%	
Self-employed	14%	17%	12%	4%	16%	13%	15%	30%	
Manager	7%			2%		3%	19%	26%	
Student	6%	8%	4%	2%	2%	1%	6%	4%	60%
Homemaker	5%			7%	5%	6%	10%	2%	
Freeter	3%	8%	8%	7%	5%				
Other	3%	25%		2%		4%		4%	
Skilled worker	3%		4%	7%	5%	3%			
Unemployed	2%	8%	4%	2%	2%	1%			40%
Professional/ Specialist	2%			2%	4%	3%		2%	
Govt- office worker non-mgr	2%		4%	4%	2%	3%	2%		
Teacher	2%	8%	8%	2%			2%	2%	
Executive (30+ employees)	2%		8%		2%	1%		4%	
Govt- Manager	1%				2%	3%	2%		
Retired	1%			2%		1%			
Total	Count 340	12	25	46	57	71	48	47	5

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall

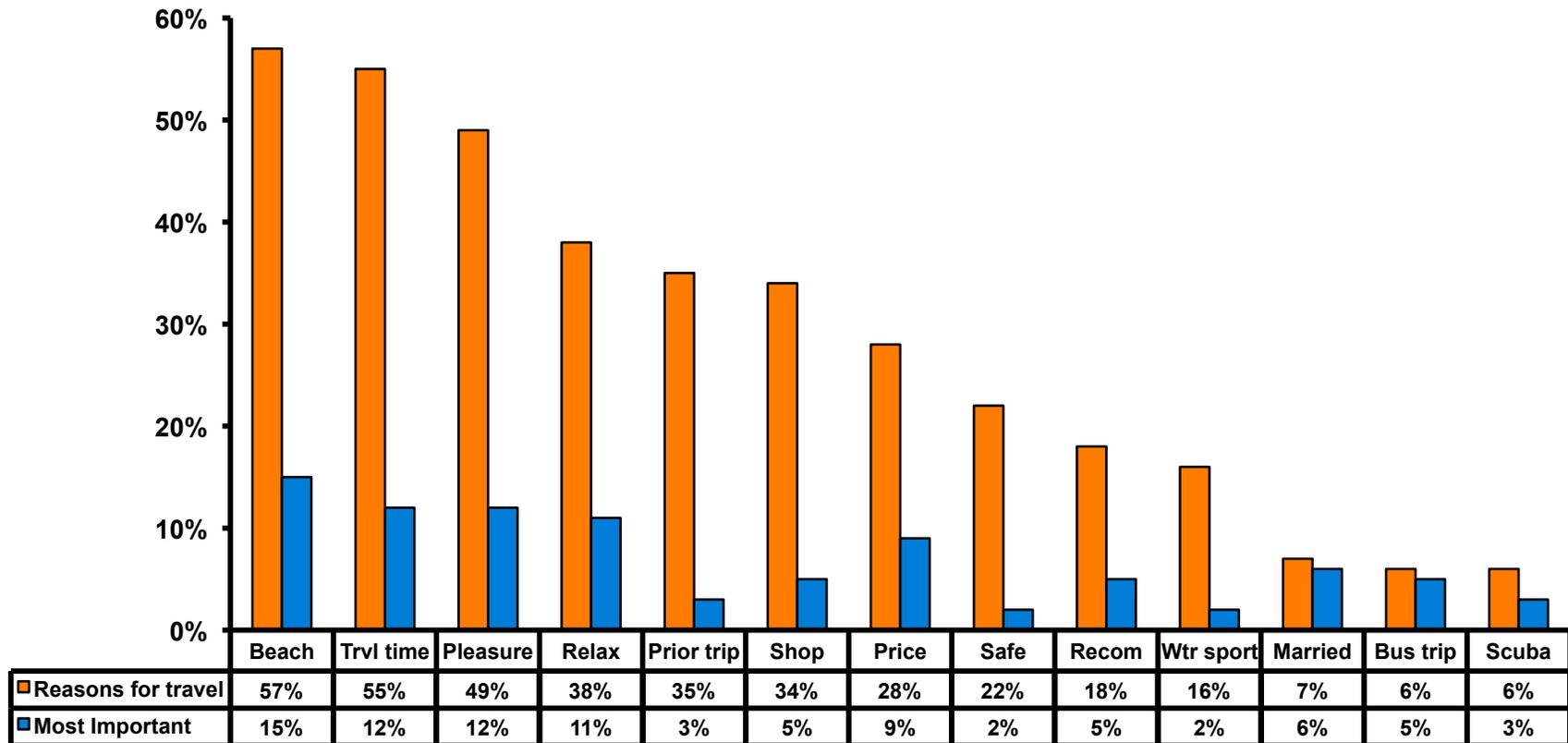


# Accommodation by Income

Average length of stay: 2.97 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%	42%	20%	24%	26%	21%	9%	13%	20%	
Guam Reef & Olive Spa	11%	8%	16%	17%	9%	11%	13%	11%		
Hilton Guam Resort	8%	8%	4%	7%	14%	8%	9%	6%		
Outrigger Guam Resort	7%		4%	11%	7%	6%	2%	13%		
Grand Plaza Hotel	5%	17%	16%	4%	7%	7%		4%		
Onward Beach Resort	5%		4%	4%	2%	8%	6%	6%		
Hotel Nikko Guam	5%		4%	2%	9%	4%	11%	2%		
Leo Palace Resort	5%	8%	12%	7%	2%	6%	2%	9%		
Pacific Bay Hotel	4%		8%	7%			6%	9%	20%	
Westin Resort Guam	4%				2%	7%	2%	13%		
Fiesta Resort Guam	3%			4%	4%	1%	2%	2%		
Guam Marriott Resort	3%		4%	2%		4%	6%	2%	20%	
Holiday Resort Guam	3%	8%	4%		4%		6%			
Hyatt Regency Guam	2%				4%	1%	6%	2%		
PIC Club	2%				5%	1%	4%			
Hotel Santa Fe	2%			4%			6%			
Royal Orchid Guam	2%		4%	4%		4%	2%			
Oceanview Hotel	2%				2%	3%			20%	
Bayview Hotel	2%	8%			4%	1%	2%	2%	20%	
Sheraton Laguna Guam	2%			2%	2%	1%	2%	4%		
Condo	1%					3%	2%			
Ramada Suites Guam	1%									
Tumon Bay Capital Hotel	0%									
Other	0%							2%		
Total	Count	351	12	25	46	57	71	47	47	5

# 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%	63%	56%	60%	46%	58%	55%	
	Short travel time	55%	48%	54%	61%	50%	56%	53%	
	Pleasure	49%	56%	44%	51%	50%	51%	47%	
	Relax	38%	42%	35%	43%	32%	41%	34%	
	Previous trip	35%	20%	28%	54%	34%	38%	31%	
	Shopping	34%	55%	31%	26%	26%	29%	39%	
	Price	28%	33%	29%	26%	22%	27%	29%	
	Safe	22%	22%	16%	25%	28%	23%	21%	
	Recomm- friend/family/trvl agnt	18%	27%	19%	14%	18%	16%	22%	
	Water sports	16%	16%	17%	18%	10%	17%	14%	
	Married/ Attn wedding	7%	2%	7%	4%	24%	9%	5%	
	Company/ Business Trip	6%	5%	10%	3%	4%	5%	7%	
	Scuba	6%	6%	3%	9%	8%	7%	5%	
	Honeymoon	5%	6%	8%	2%		7%	2%	
	Golf	5%	2%	2%	4%	18%	6%	3%	
	Other	5%	3%	2%	10%	2%	4%	5%	
	Organized sports	1%	2%			6%	2%	1%	
	Company Sponsored	1%			2%	2%	2%		
	Visit friends/ Relatives	1%		1%	1%		1%		
	Career Cert/ Testing	0%			1%		1%		
	Total	Count	352	64	133	103	50	200	152

# 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%	42%	60%	61%	54%	46%	67%	62%	60%	
	Short travel time	55%	50%	64%	46%	46%	54%	60%	68%	40%	
	Pleasure	49%	67%	60%	39%	54%	41%	56%	60%	20%	
	Relax	38%	25%	44%	39%	44%	21%	54%	43%	20%	
	Previous trip	35%	17%	20%	28%	33%	39%	44%	51%	40%	
	Shopping	34%	42%	40%	37%	30%	25%	44%	32%	60%	
	Price	28%	33%	36%	33%	19%	35%	25%	15%		
	Safe	22%	25%	16%	17%	14%	24%	33%	19%	40%	
	Recomm- friend/family/trvl agnt	18%	25%	24%	17%	19%	14%	21%	13%	40%	
	Water sports	16%	42%	16%	20%	18%	10%	19%	15%	20%	
	Married/ Attn wedding	7%	8%		9%	11%	15%	6%	2%		
	Company/ Business Trip	6%	17%	12%	4%	7%	3%	6%	2%		
	Scuba	6%			2%	9%	4%	10%	6%		
	Honeymoon	5%		8%	7%	7%	10%		2%		
	Golf	5%		8%	2%	2%	7%	2%	13%	20%	
	Other	5%			13%	2%	3%		13%		
	Organized sports	1%						2%	2%		
	Company Sponsored	1%						4%	2%		
	Visit friends/ Relatives	1%	8%			2%					
	Career Cert/ Testing	0%	8%								
	Total	Count	352	12	25	46	57	71	48	47	5

# SECTION 3 **EXPENDITURES**

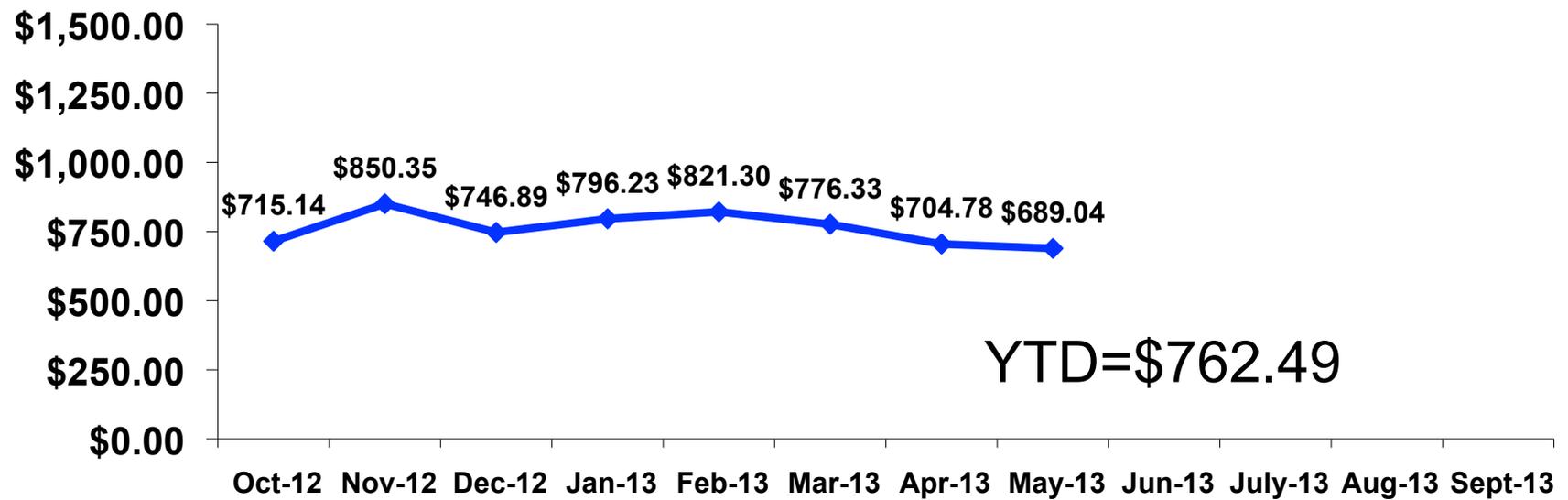
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# Prepaid Expenditures

¥100.33/US\$1

- \$1,369.38 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$24,918 = maximum (highest amount recorded for the entire sample)
- \$689.04 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person



# Breakdown of Prepaid Expenditures

¥100.33=\$1

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

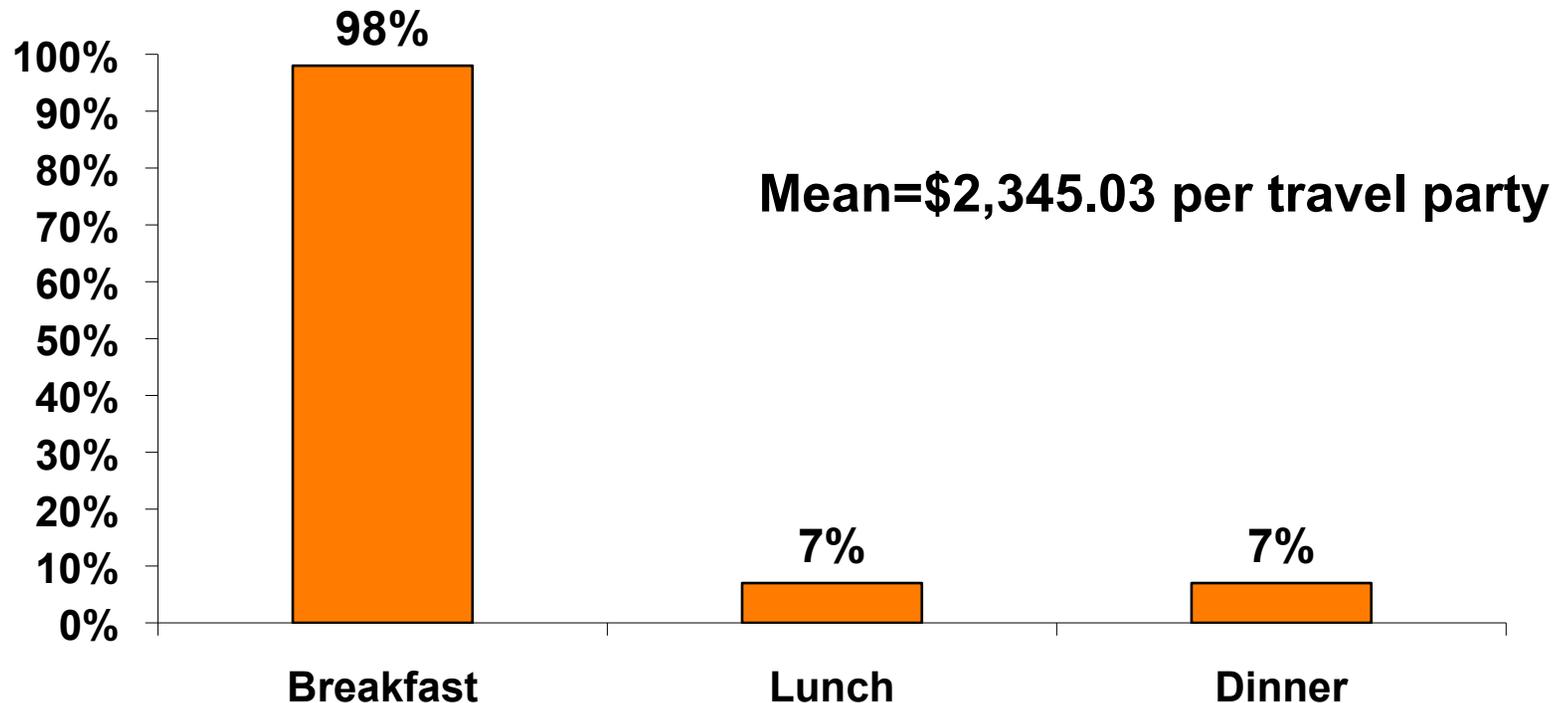
	MEAN \$
Air & Accommodation package only	\$1,172.35
Air & Accommodation w/ daily meal package	\$2,345.03
Air only	\$1,201.04
Accommodation only	\$810.33
Accommodation w/ daily meal only	\$1,102.61
Food & Beverages in Hotel	\$149.51
Ground transportation - Japan	\$66.88
Ground transportation - Guam	\$89.08
Optional tours/ activities	\$471.05
Other expenses	\$235.40
<b>Total Prepaid</b>	<b>\$1,369.38</b>

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# Prepaid Meal Breakdown

## Air/ Accommodations with Daily Meal Package

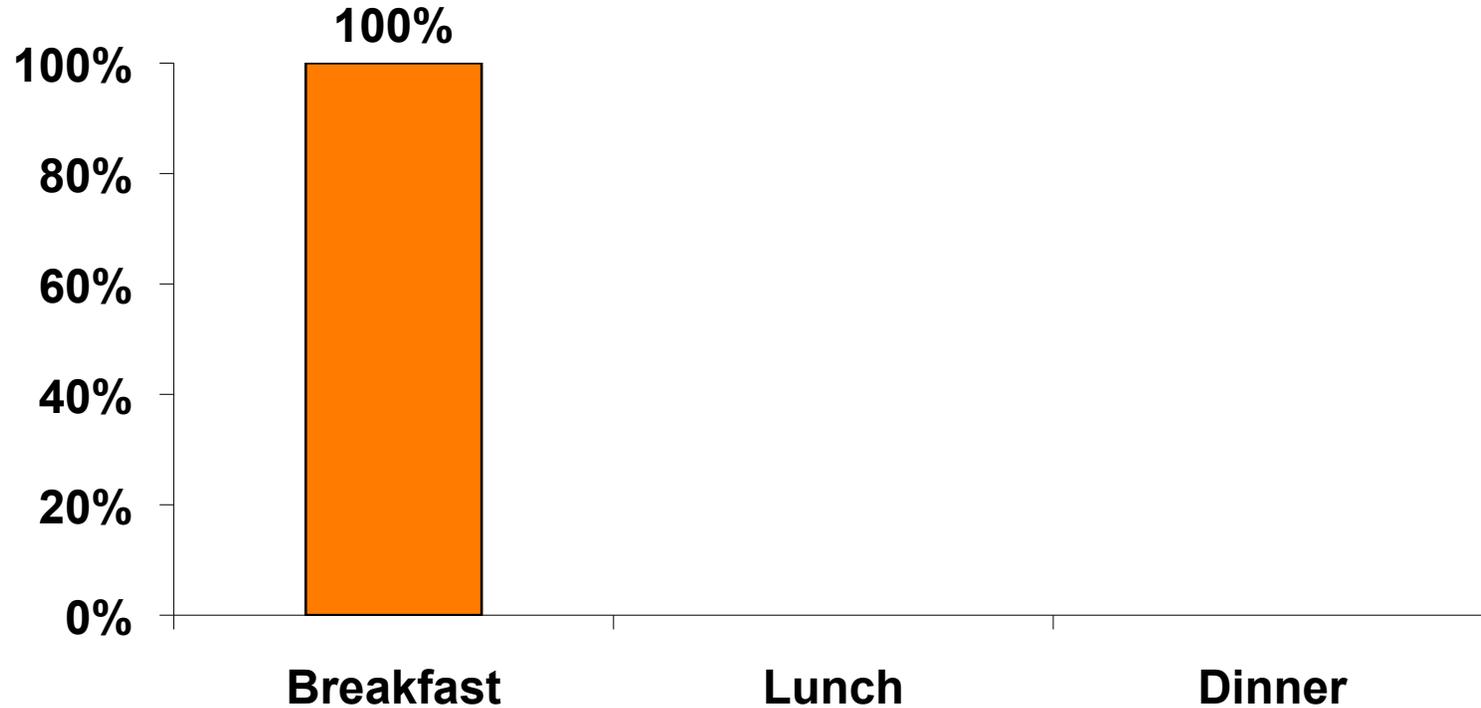
n=86



# Prepaid Meal Breakdown

Accommodations with Daily Meal Package

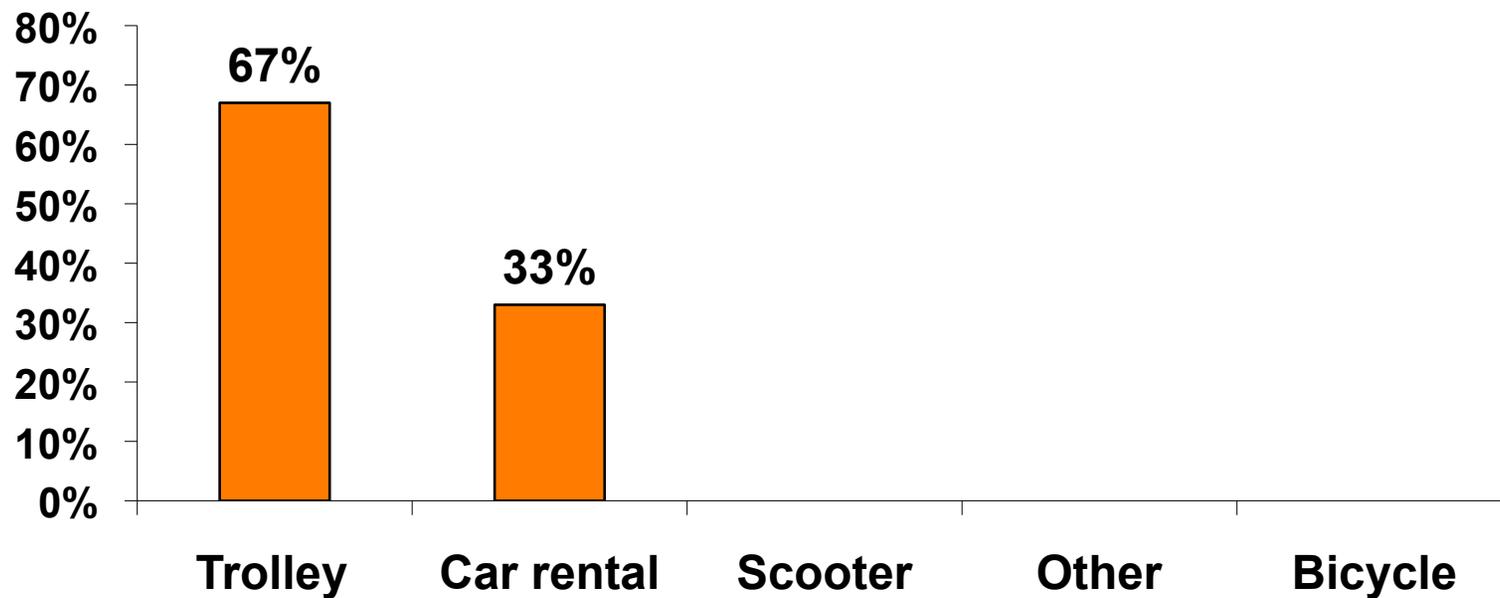
n=3



Mean=\$1,102.61 per travel party

# Prepaid Ground Transportation

n=3

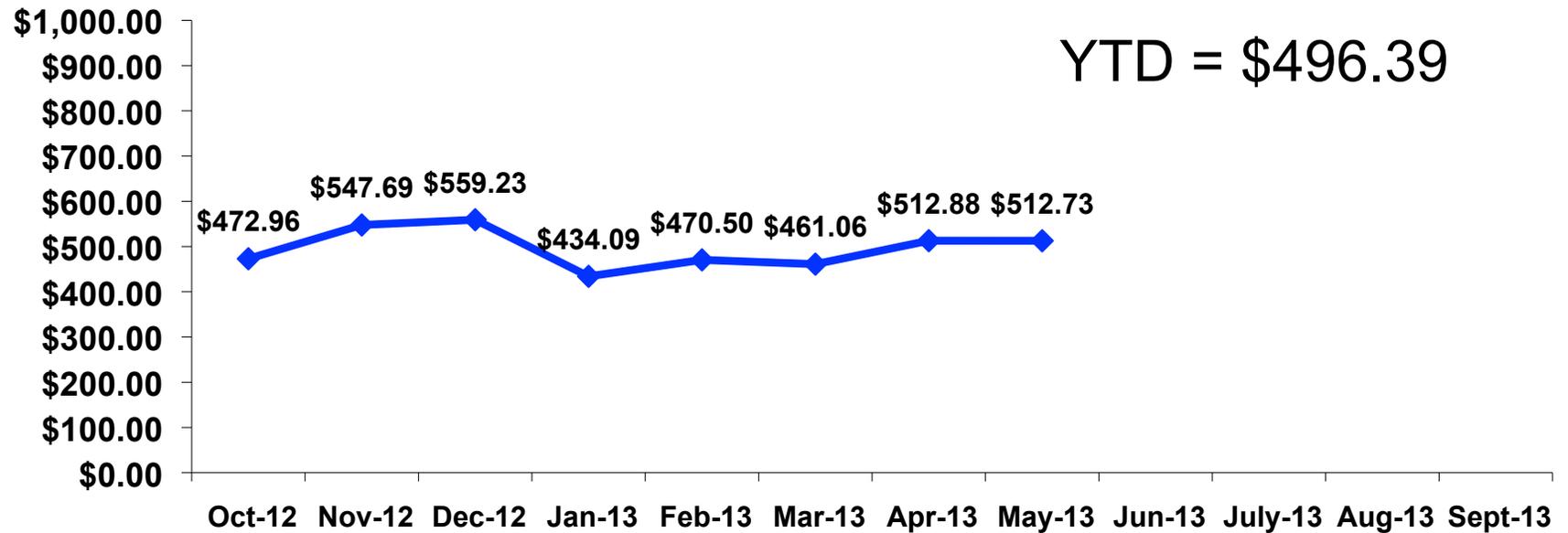


Mean=\$66.88 per travel party

# On-Island Expenditures

- \$898.28 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,000 = Maximum (highest amount recorded for the entire sample)
- \$512.73 = overall mean average per person on-island expenditure

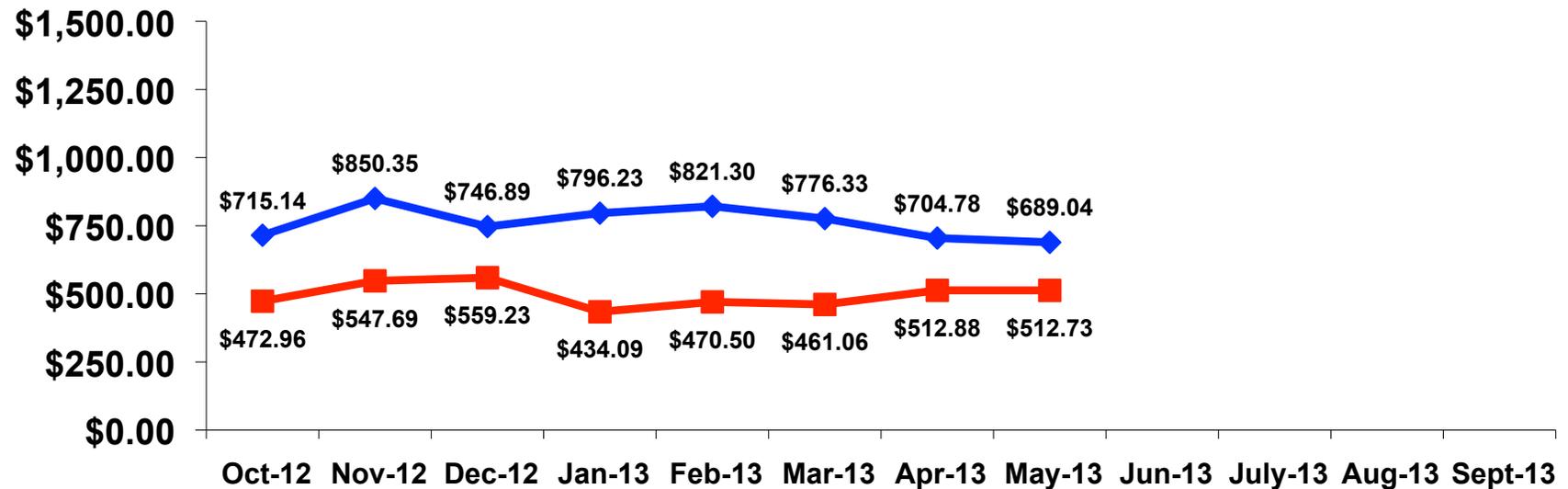
# On-Island Expenditures Per Person



# Prepaid /On-Island Expenditures Per Person

Prepaid YTD = \$762.49

On-Island YTD = \$496.39



# Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
			Male	Female	AGE				AGE			
		-			18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$512.73	\$493.62	\$537.89	\$499.44	\$564.53	\$418.97	\$510.80	\$447.81	\$571.15	\$665.38	\$372.45
	Median	\$400	\$388	\$400	\$475	\$468	\$333	\$350	\$395	\$400	\$450	\$354
	Minimum	\$0	\$0	\$0	\$45	\$0	\$0	\$0	\$0	\$0	\$40	\$0
	Maximum	\$5,000	\$2,500	\$5,000	\$1,600	\$2,500	\$2,000	\$1,750	\$2,000	\$5,000	\$4,000	\$1,074

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$35.70	\$43.06	\$26.02	\$16.69	\$15.69	\$57.57	\$69.64
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.02	\$35.27	\$25.43	\$16.84	\$25.89	\$37.59	\$50.54
	Median	\$8	\$10	\$8	\$0	\$7	\$20	\$19
F&B RESTRNT	Mean	\$88.14	\$101.42	\$70.67	\$42.11	\$75.74	\$109.86	\$138.80
	Median	\$10	\$15	\$3	\$0	\$18	\$20	\$15
OPT TOUR	Mean	\$119.88	\$130.02	\$106.55	\$45.69	\$99.32	\$174.66	\$161.48
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$205.33	\$200.92	\$211.13	\$161.31	\$202.80	\$233.43	\$218.70
	Median	\$25	\$10	\$45	\$10	\$20	\$50	\$50
GIFT- OTHER	Mean	\$142.63	\$136.97	\$150.07	\$142.25	\$116.46	\$136.52	\$230.98
	Median	\$50	\$50	\$50	\$47	\$50	\$40	\$100
TRANS	Mean	\$18.56	\$22.63	\$13.21	\$8.11	\$14.71	\$30.68	\$17.96
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$254.30	\$281.17	\$218.95	\$208.81	\$266.20	\$298.69	\$185.62
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$898.28	\$956.94	\$821.09	\$641.81	\$822.89	\$1,078.52	\$1,077.72
	Median	\$600	\$710	\$500	\$500	\$500	\$800	\$714

# On-Island Expenditures

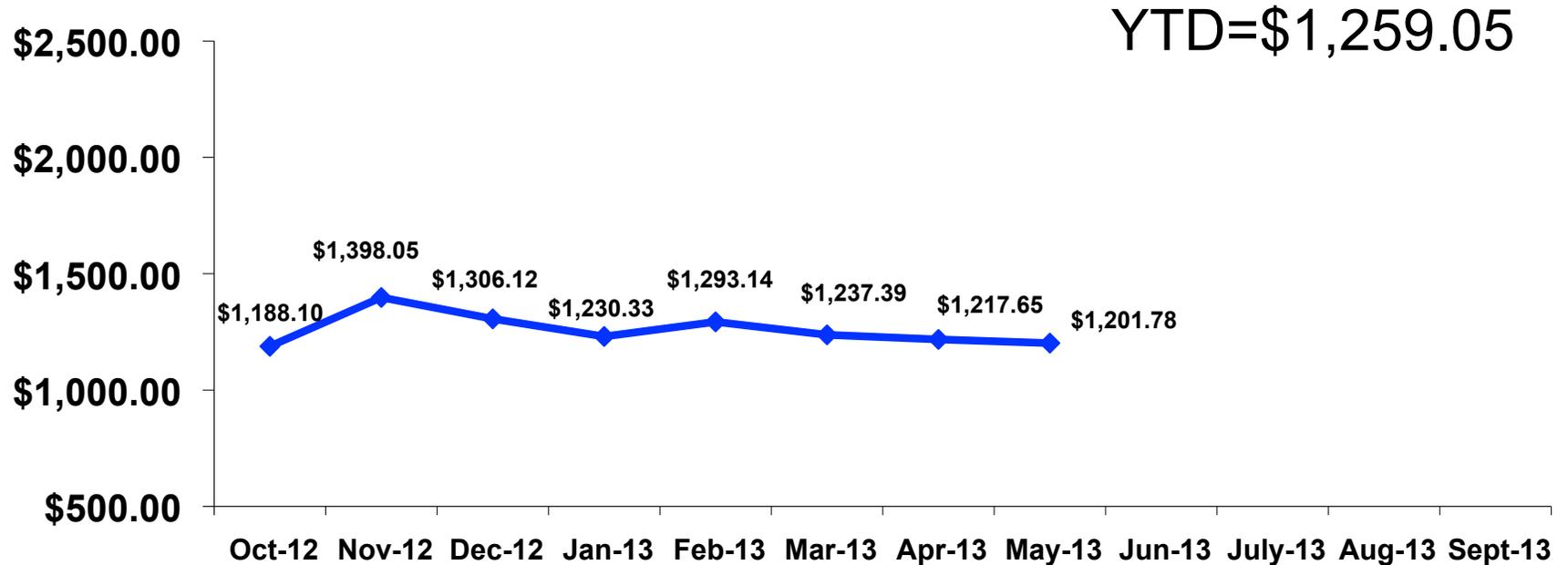
## First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$35.70	\$23.89	\$49.09
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.02	\$24.86	\$38.01
	Median	\$8	\$8	\$9
F&B RESTRNT	Mean	\$88.14	\$75.96	\$101.94
	Median	\$10	\$0	\$30
OPT TOUR	Mean	\$119.88	\$99.18	\$143.35
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$205.33	\$165.98	\$249.92
	Median	\$25	\$0	\$50
GIFT- OTHER	Mean	\$142.63	\$131.35	\$155.41
	Median	\$50	\$50	\$50
TRANS	Mean	\$18.56	\$9.13	\$29.25
	Median	\$0	\$0	\$0
OTHER	Mean	\$254.30	\$257.57	\$250.61
	Median	\$0	\$0	\$0
TOTAL	Mean	\$898.28	\$792.47	\$1,018.20
	Median	\$600	\$500	\$635

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

- \$1,201.78 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,058 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures Per Person



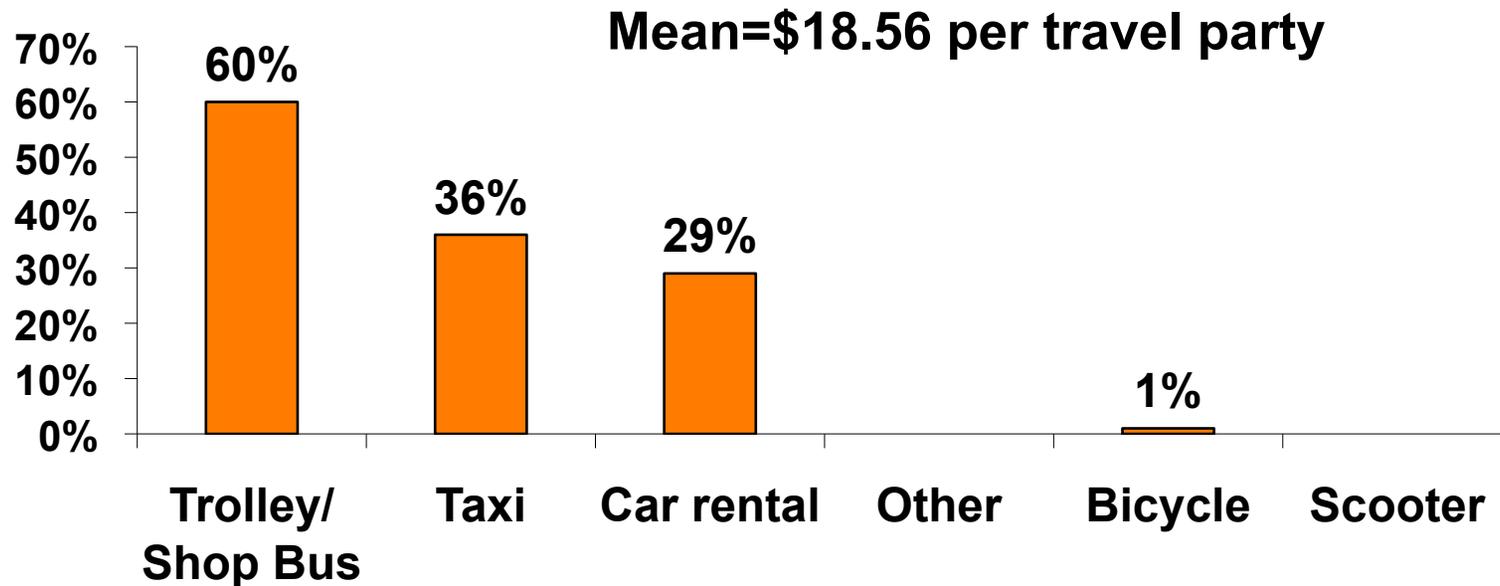
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# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$35.70
Food & beverage in fast food restaurant/ convenience store	\$31.02
Food & beverage at restaurants or drinking establishments outside a hotel	\$88.14
Optional tours and activities	\$119.88
Gifts/ souvenirs for yourself/companions	\$205.33
Gifts/ souvenirs for friends/family at home	\$142.63
Local transportation	\$18.56
Other expenses not covered	\$254.30
<b>Average Total</b>	<b>\$898.28</b>

# Local Transportation

n=85



# Guam Airport Expenditures

- \$28.21 = Mean
- \$8 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$700 = Maximum (highest amount recorded for the entire sample)

---

# Breakdown of Airport Expenditures

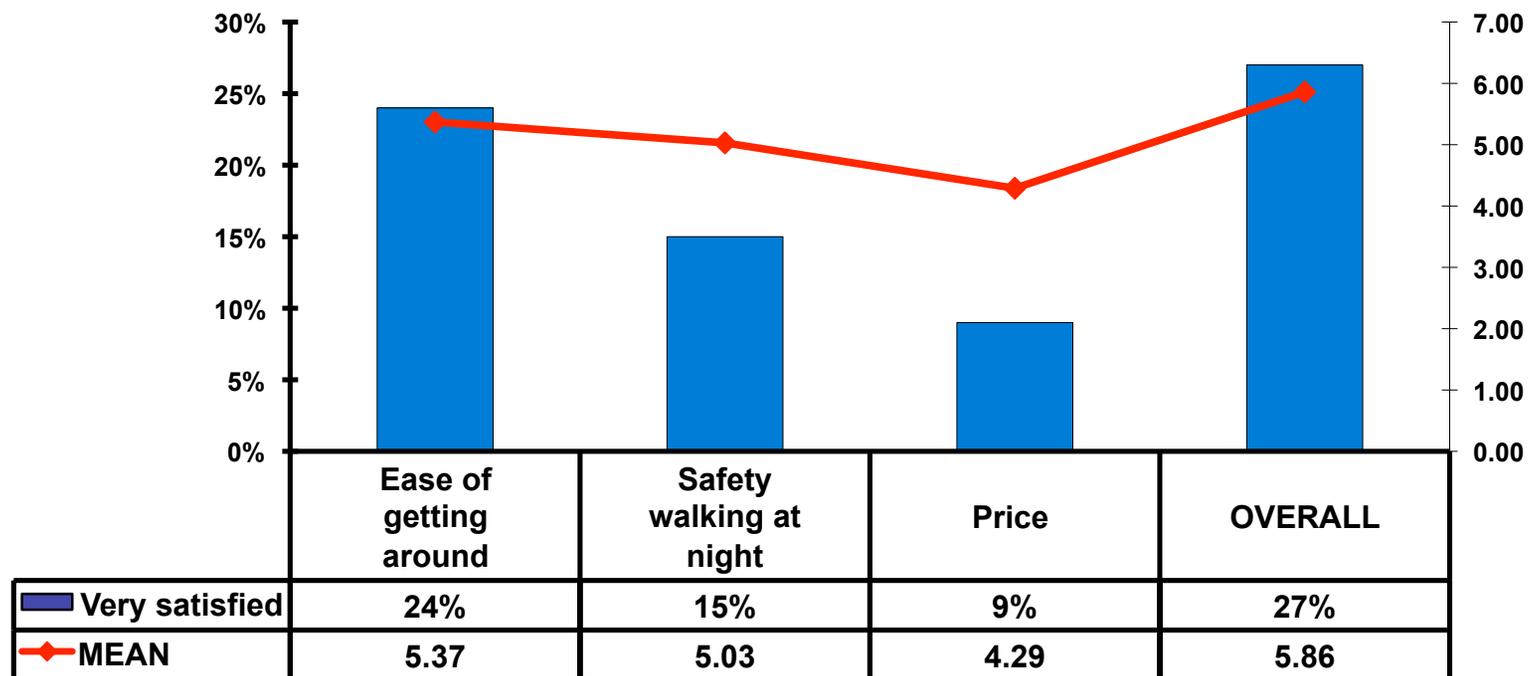
	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	\$8.05
<b>Gifts/Souvenirs Self</b>	\$11.68
<b>Gifts/Souvenirs Others</b>	\$8.49
<b>Total</b>	<b>\$28.21</b>

# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

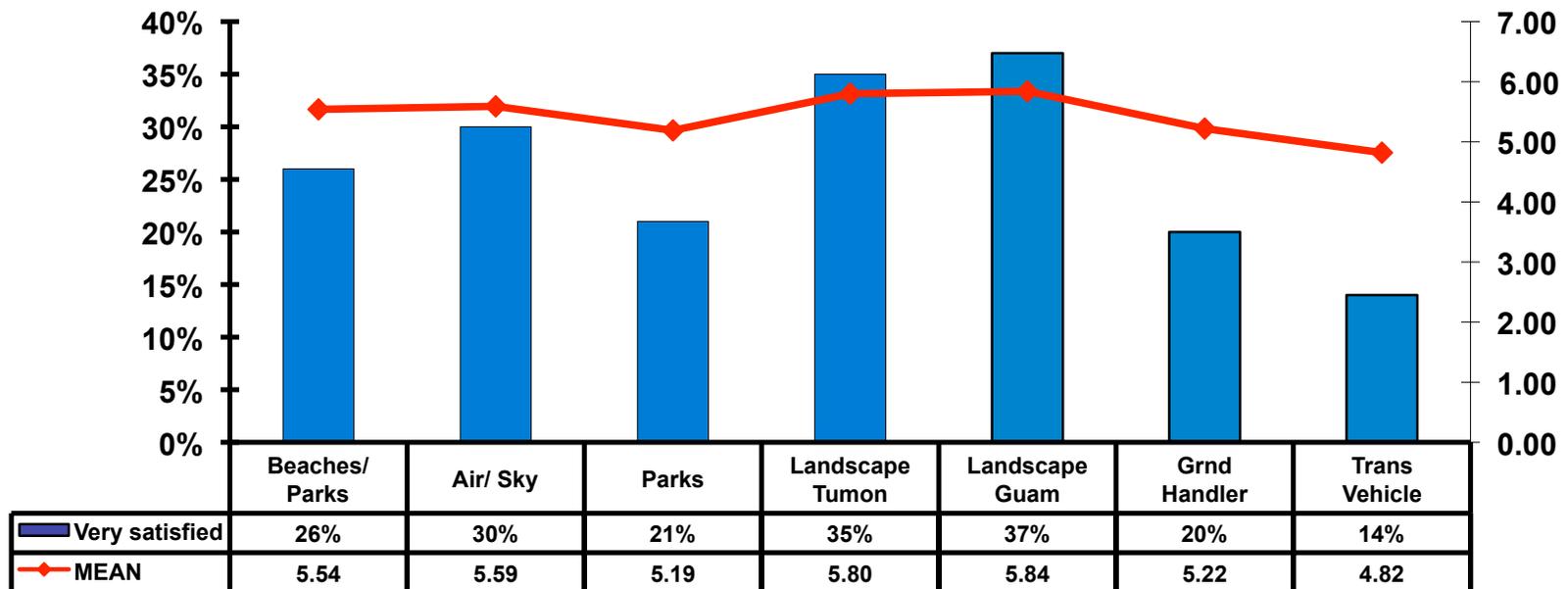
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

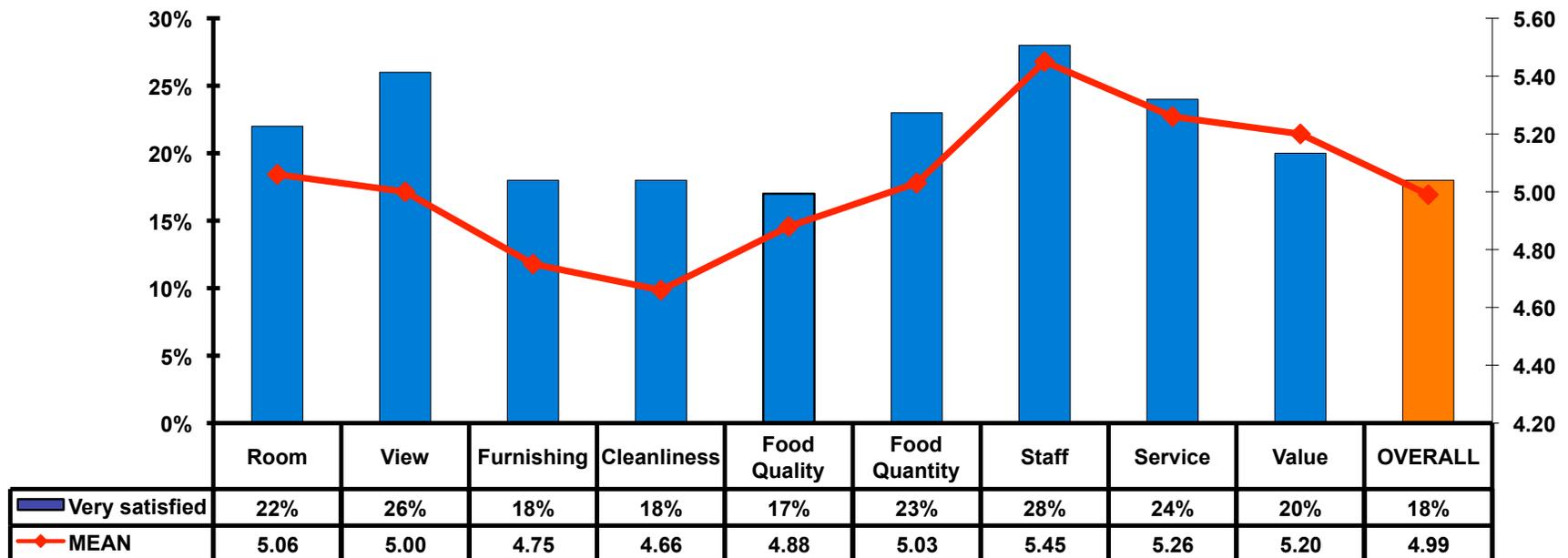
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

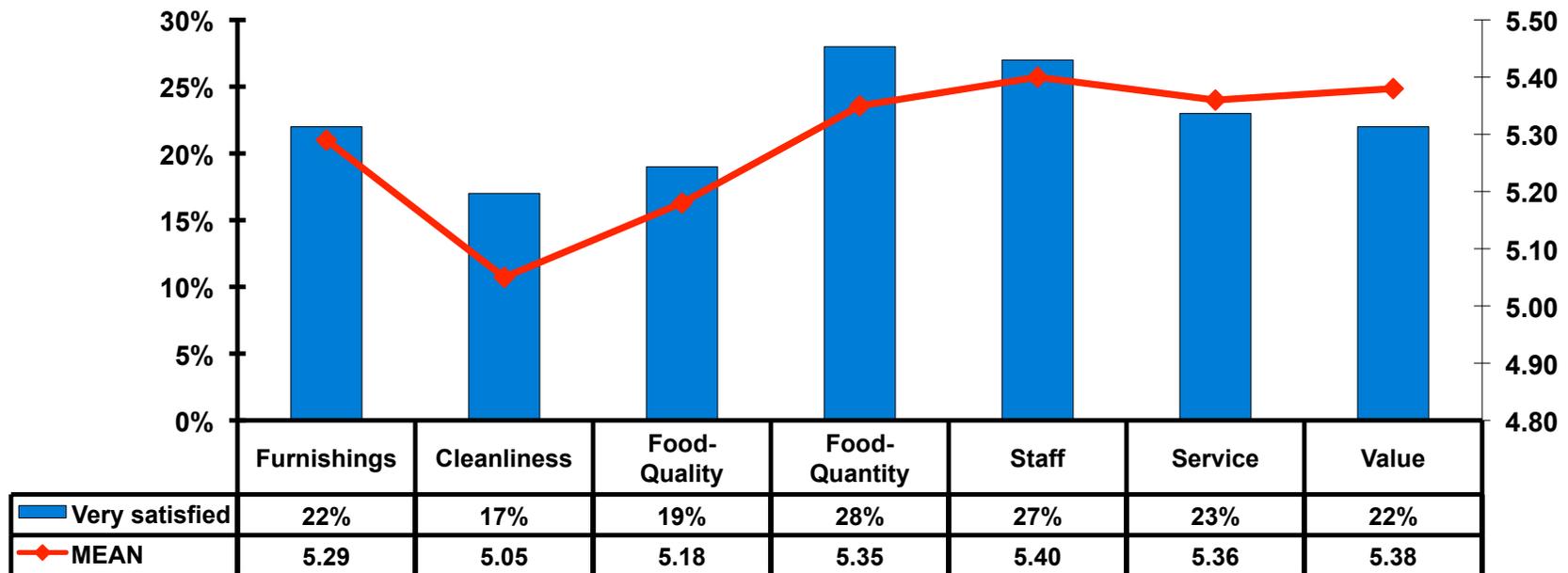
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

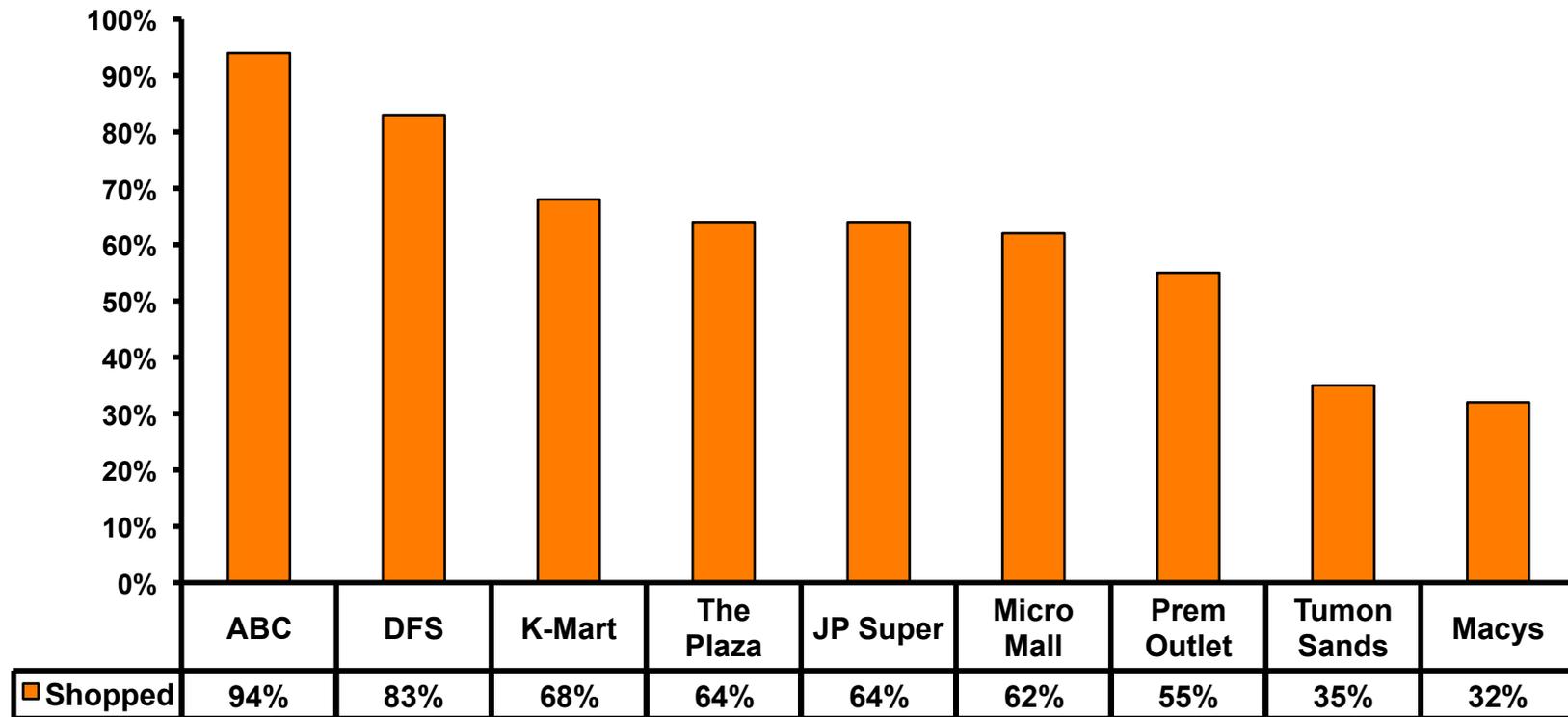
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

7pt Rating Scale

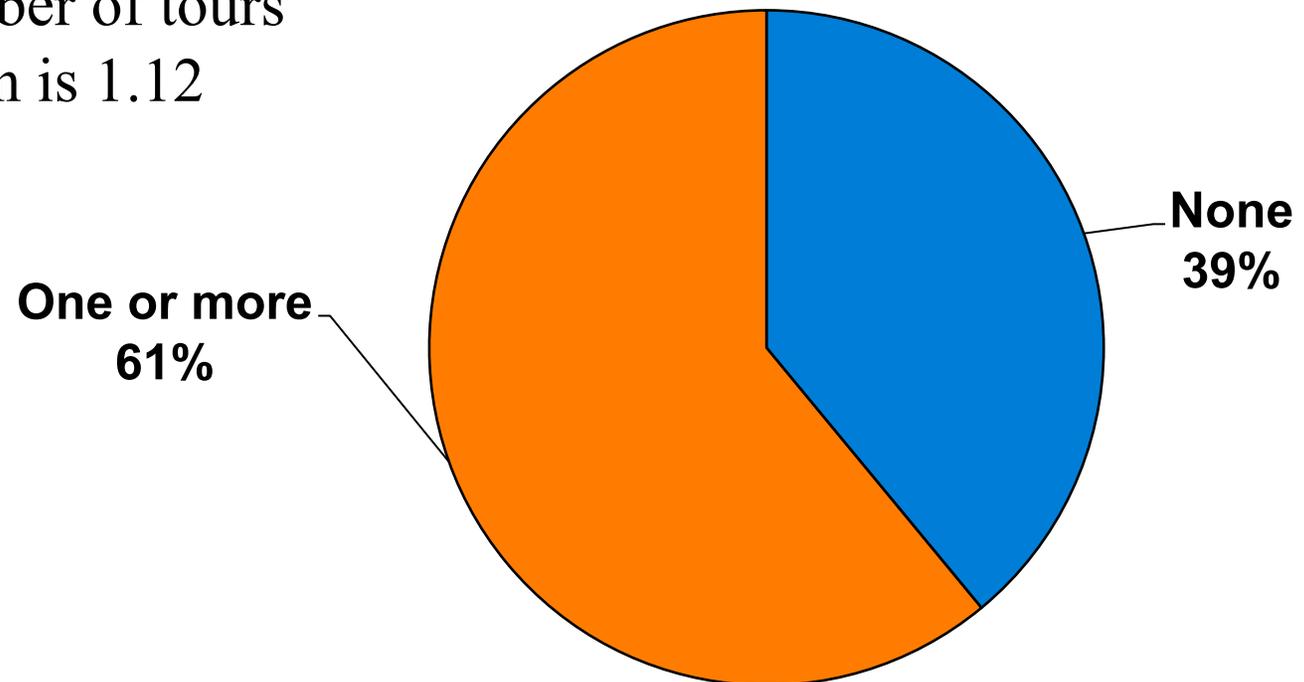
7=Very Satisfied/ 1=Very Dissatisfied

<b>Quality of Shopping</b>	<b>Variety of Shopping</b>
Score of 6 to 7 = <b>49%</b>	Score of 6 to 7 = <b>44%</b>
Score of 4 to 5 = <b>46%</b>	Score of 4 to 5 = <b>48%</b>
Score 1 to 3 = <b>5%</b>	Score 1 to 3 = <b>7%</b>
<b>MEAN = 5.33</b>	<b>MEAN = 5.20</b>

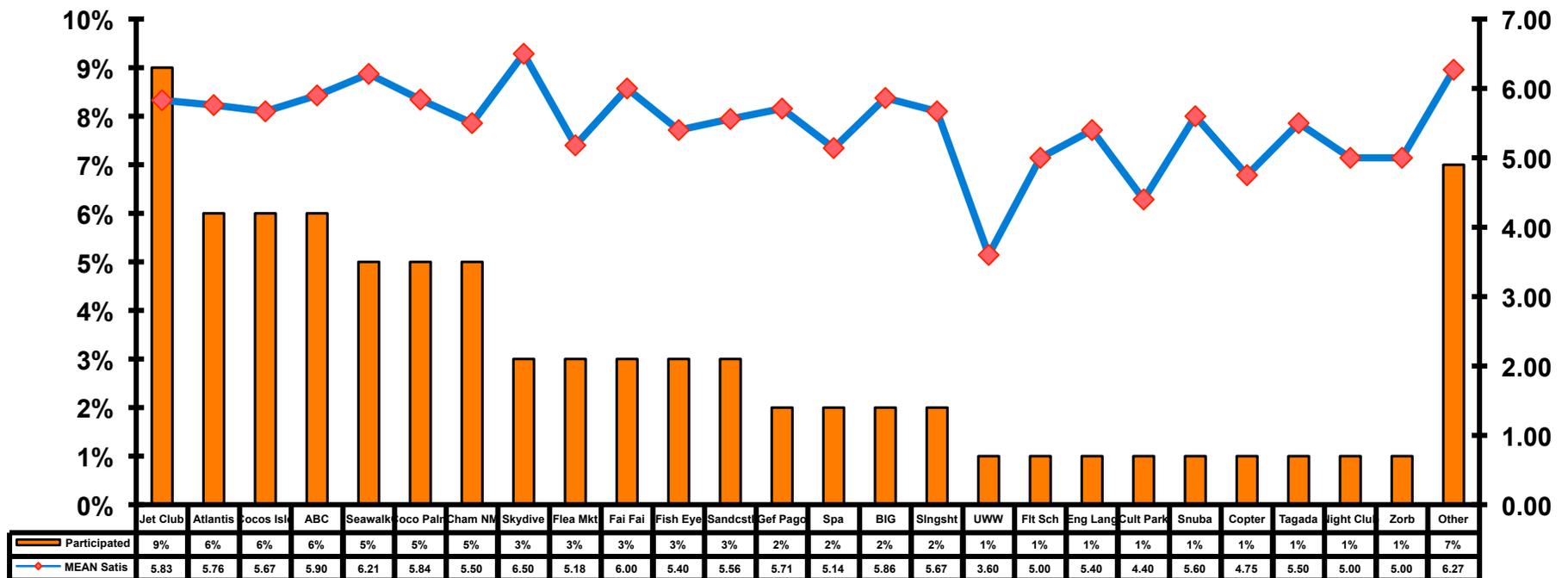
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# Optional Tour Participation

- Average number of tours participated in is 1.12



# Optional Tours Participation & Satisfaction



# Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

<b>Quality of Day Tour</b>	<b>Variety of Day Tour</b>
Score of 6 to 7 = <b>54%</b>	Score of 6 to 7 = <b>51%</b>
Score of 4 to 5 = <b>43%</b>	Score of 4 to 5 = <b>47%</b>
Score 1 to 3 = <b>3%</b>	Score 1 to 3 = <b>2%</b>
<b>MEAN = 5.43</b>	<b>MEAN = 5.34</b>

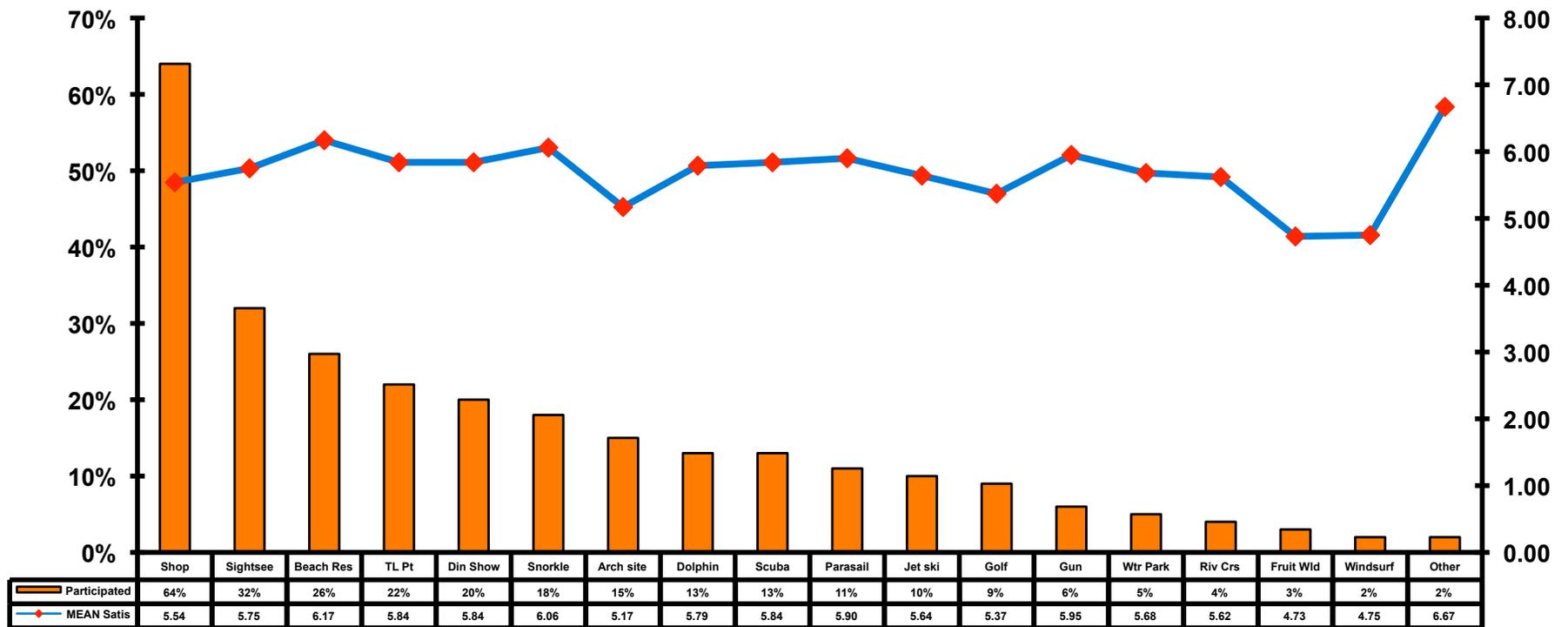
# Night Tours Satisfaction

7pt Rating Scale

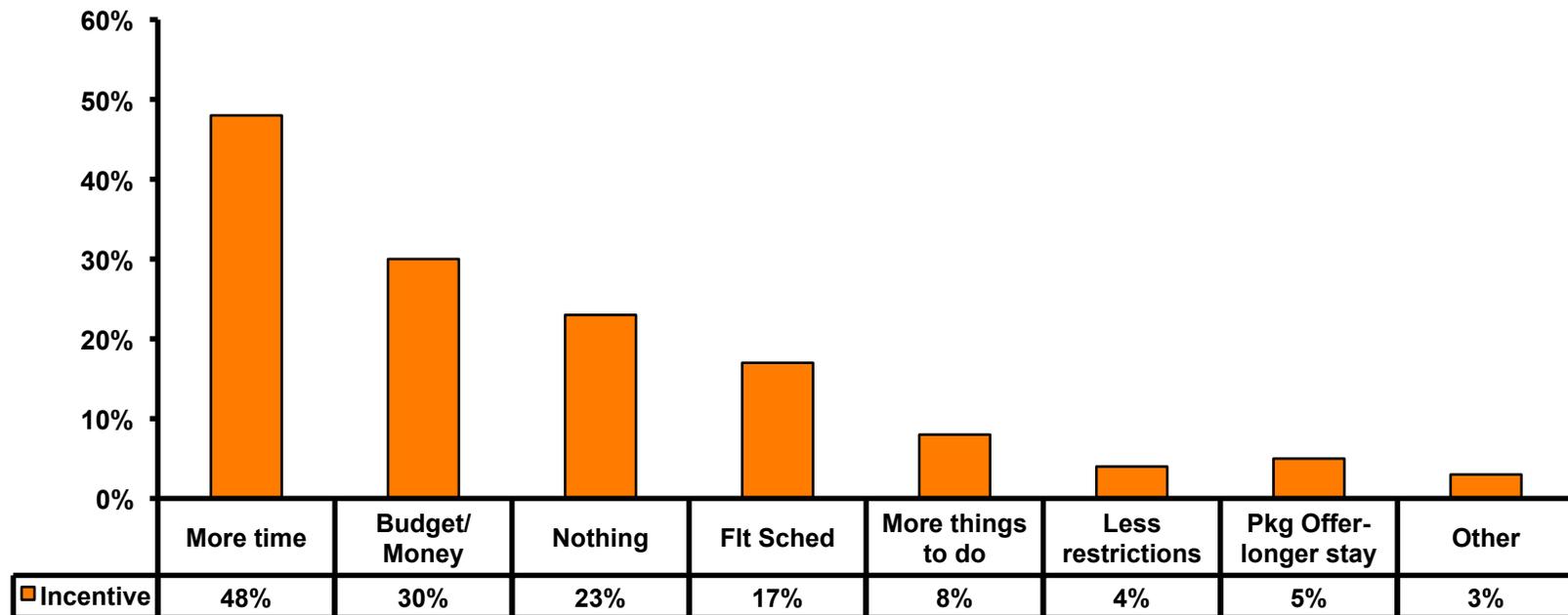
7=Very Satisfied/ 1=Very Dissatisfied

<b>Quality of Night Tour</b>	<b>Variety of Night Tour</b>
Score of 6 to 7 = <b>29%</b>	Score of 6 to 7 = <b>27%</b>
Score of 4 to 5 = <b>67%</b>	Score of 4 to 5 = <b>68%</b>
Score 1 to 3 = <b>3%</b>	Score 1 to 3 = <b>5%</b>
<b>MEAN = 4.75</b>	<b>MEAN = 4.72</b>

# Satisfaction with Other Activities



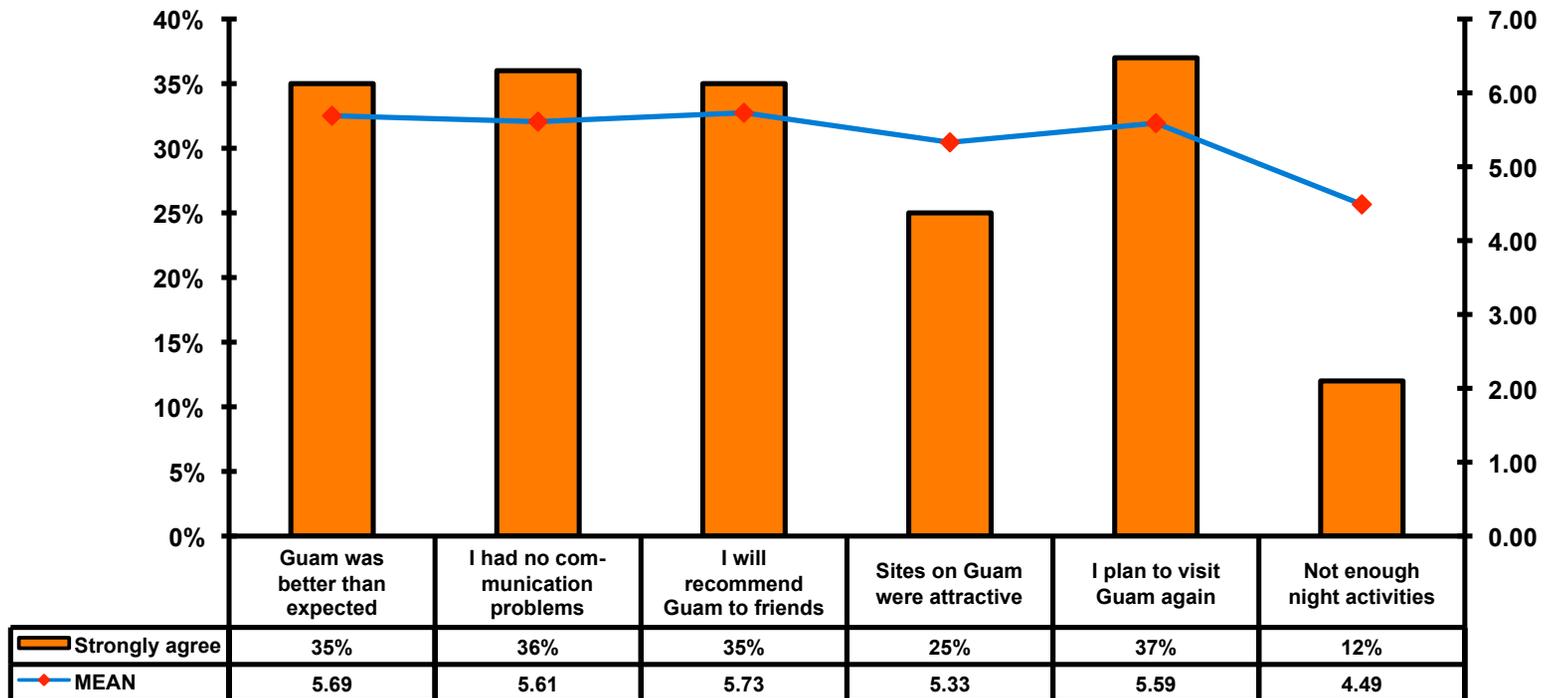
# What would it take to make you want to stay an extra day in Guam?



# On-Island Perceptions

7pt Rating Scale

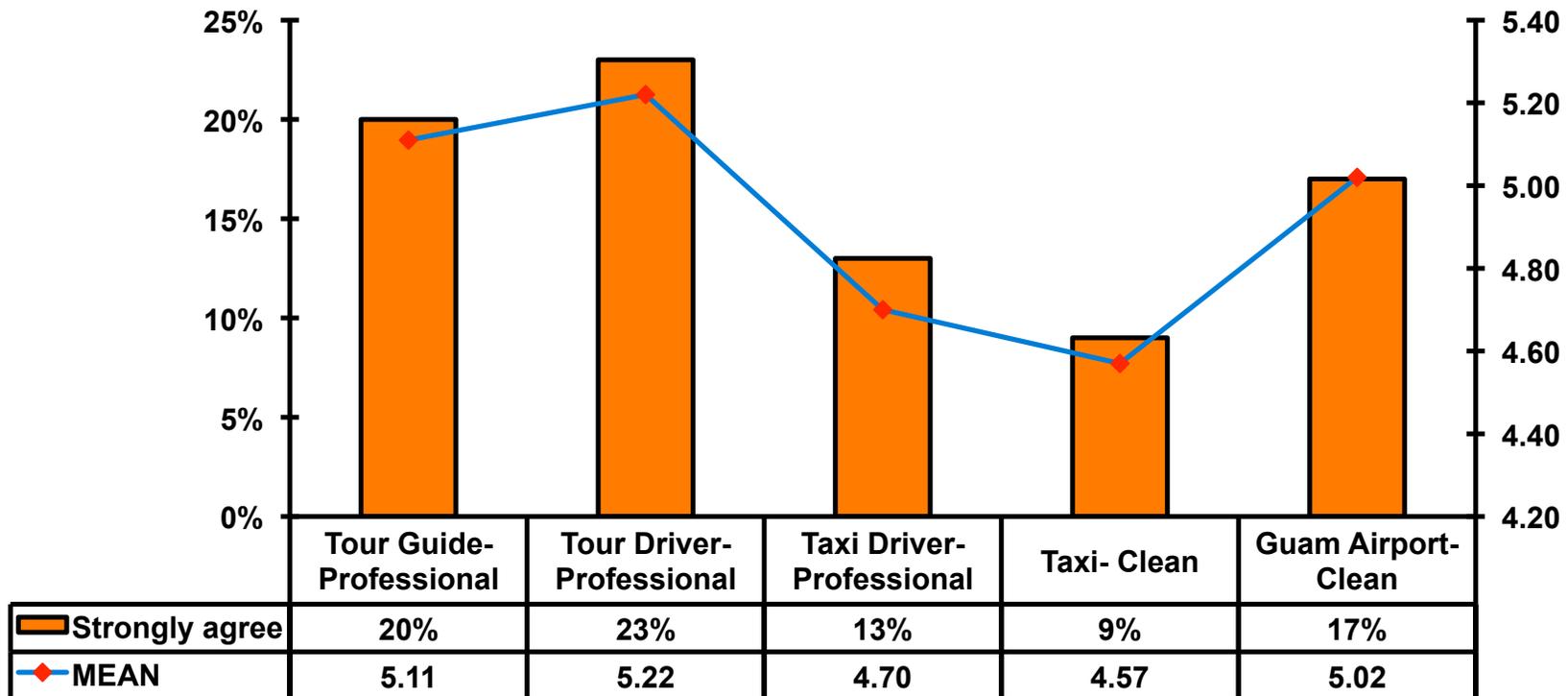
7=Very Satisfied/ 1=Very Dissatisfied



# On-Island Perceptions

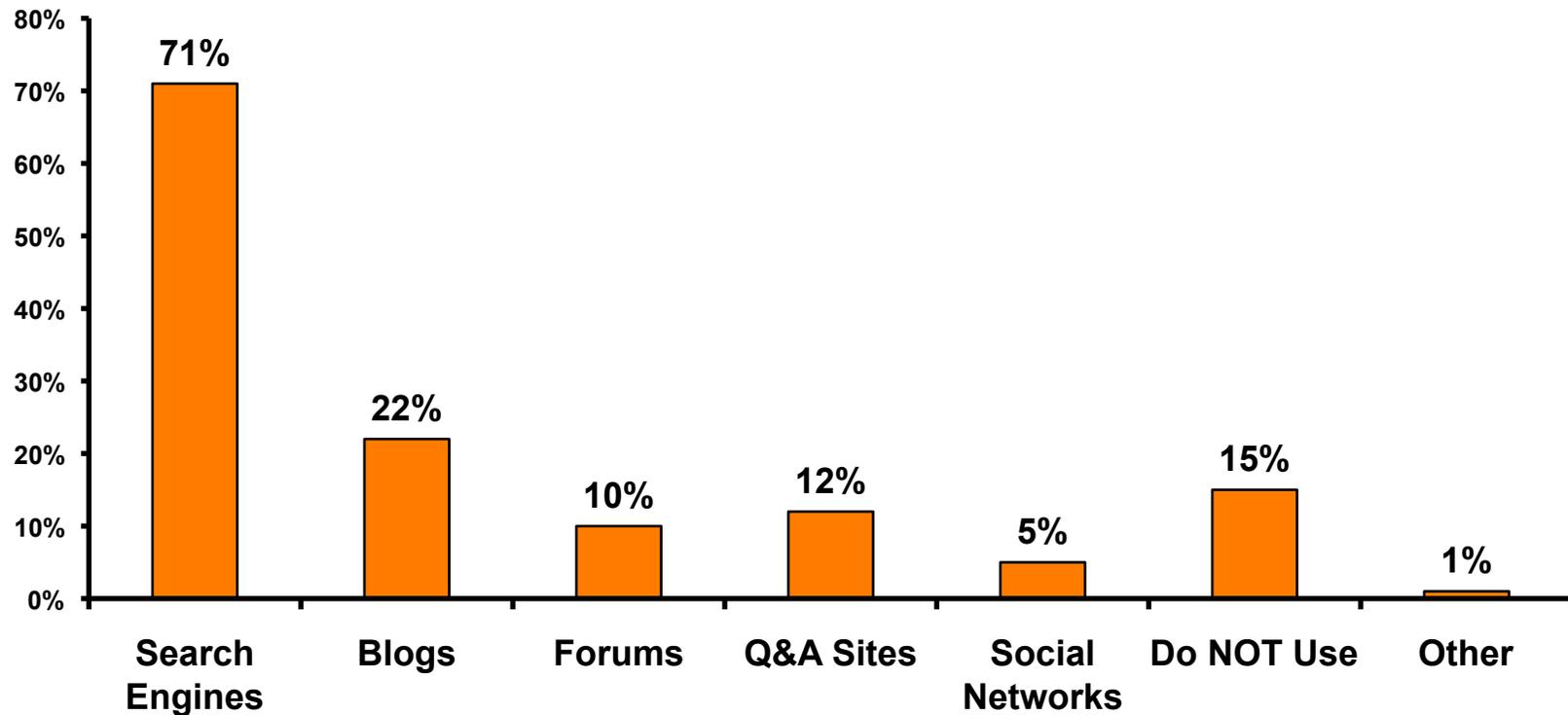
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



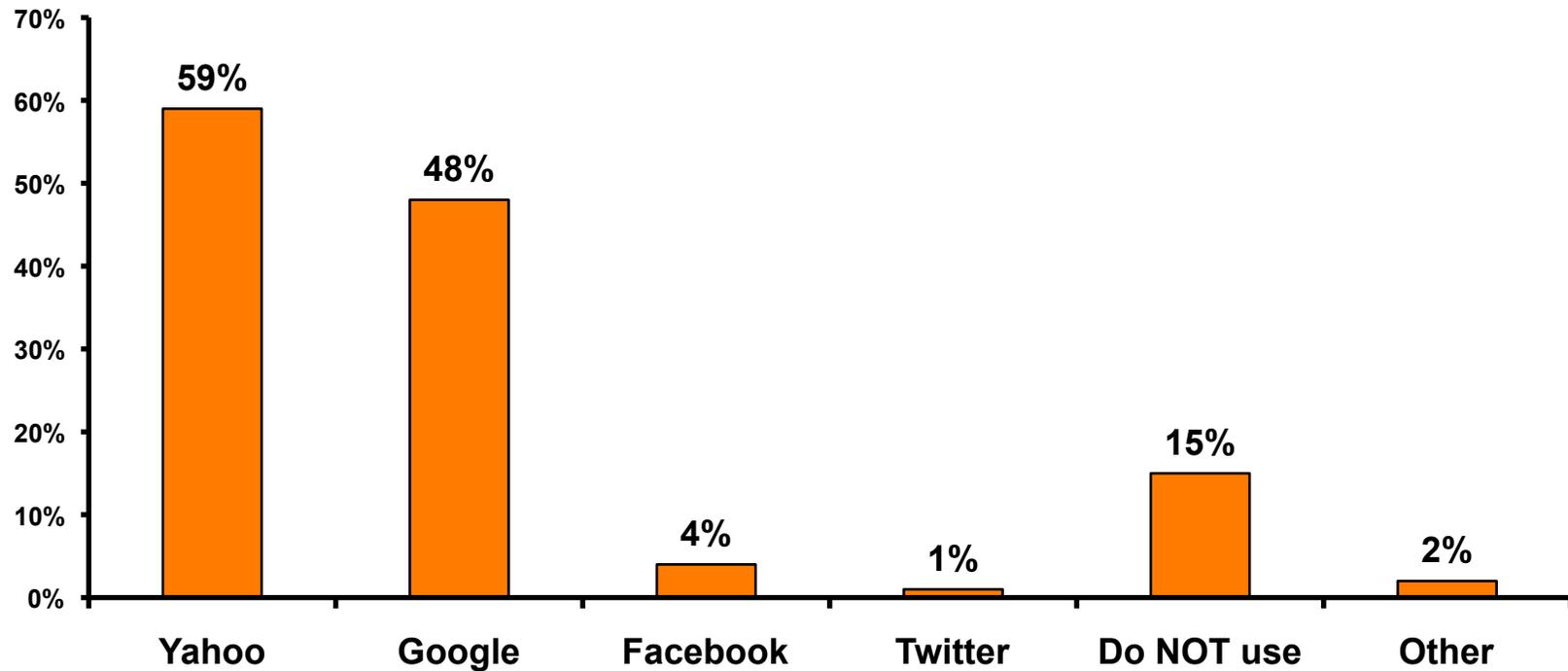
# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info

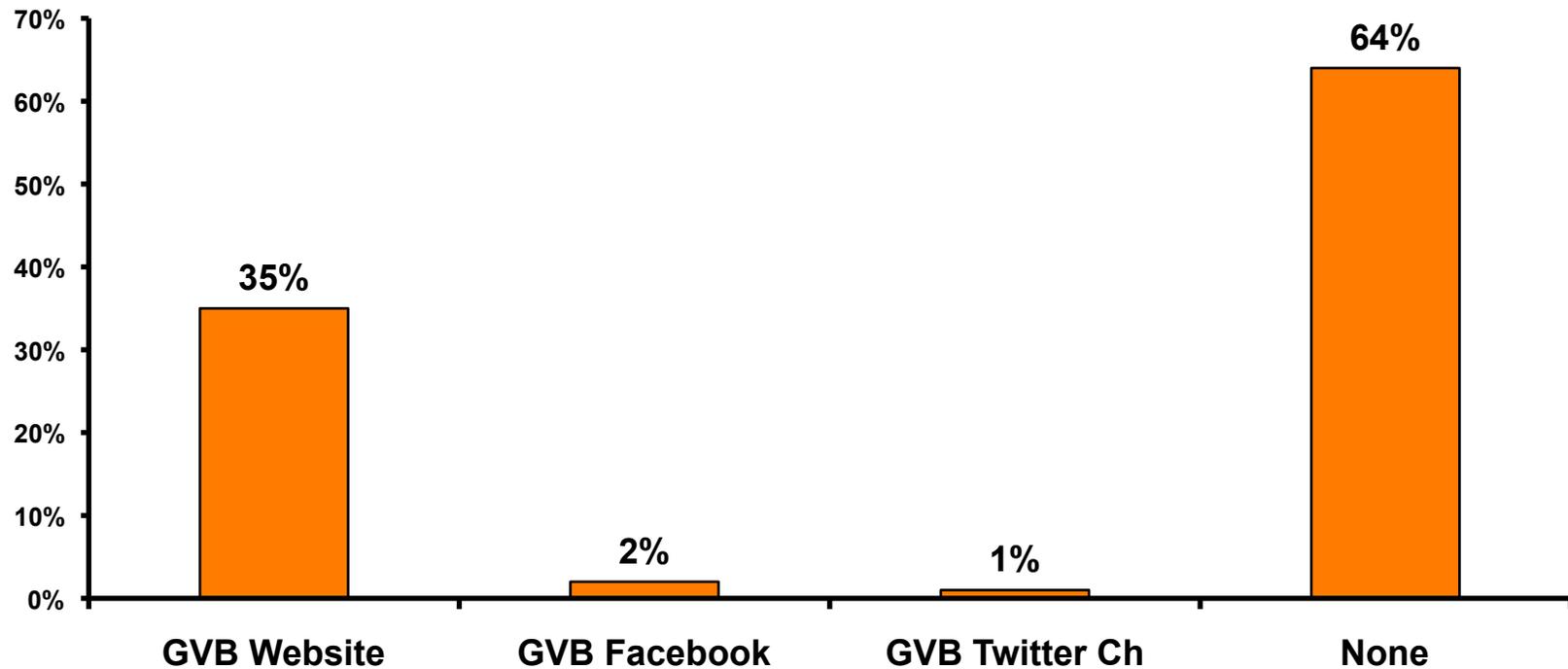


# Internet- Things To Do

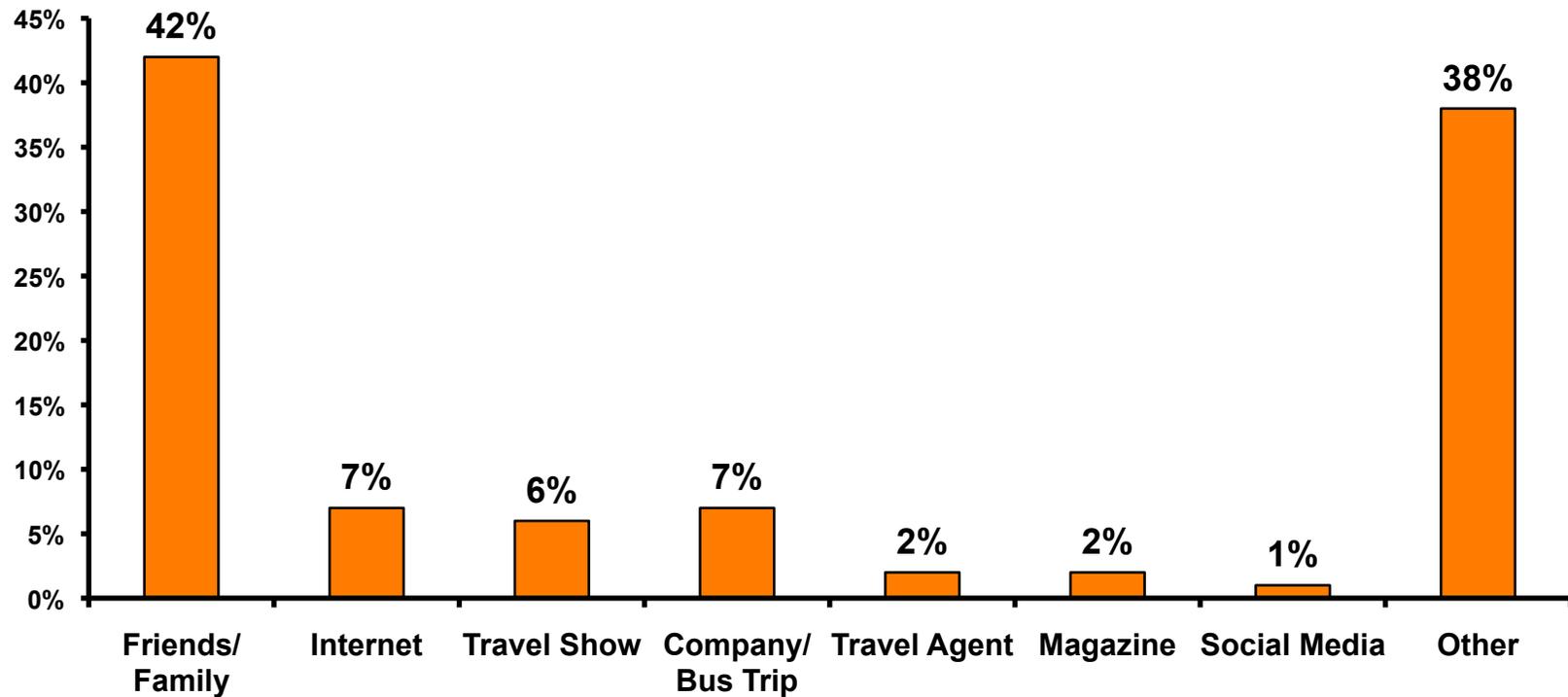
## Sources of Info



# Internet- GVB Sources

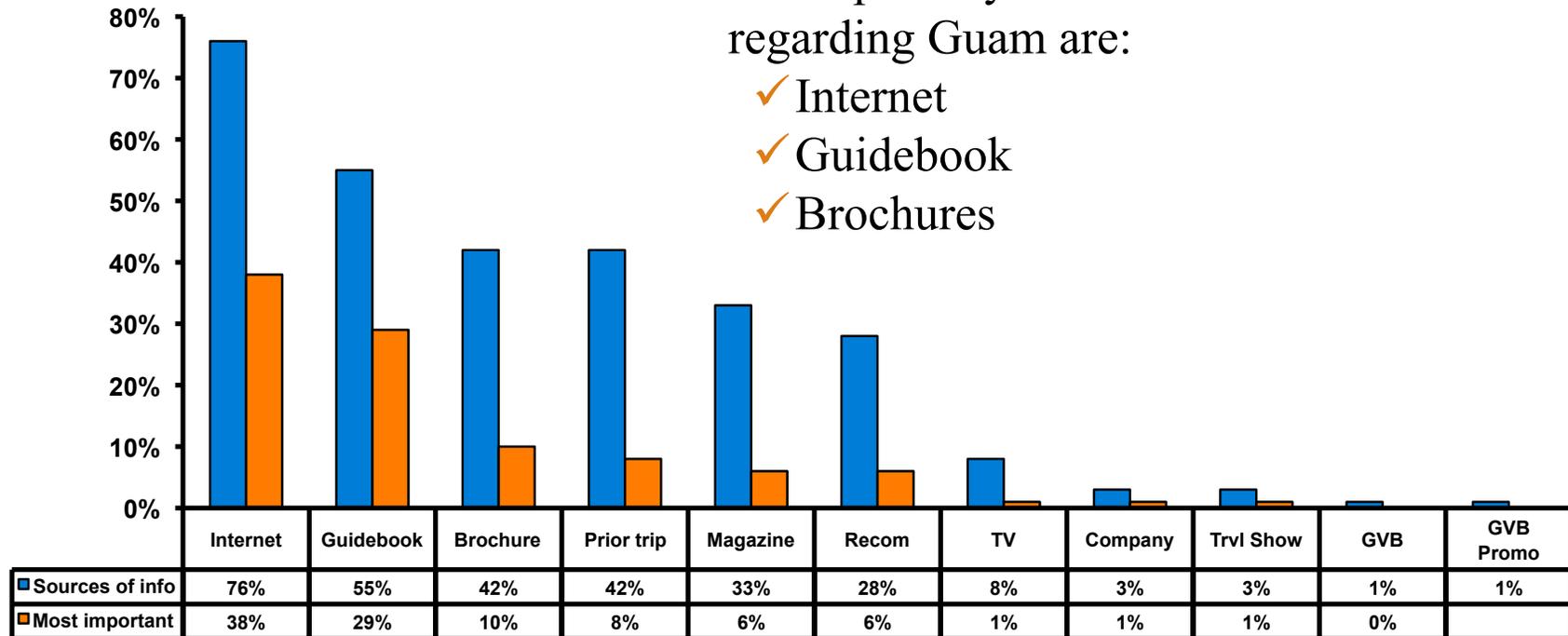


# Travel Motivation- Info Sources



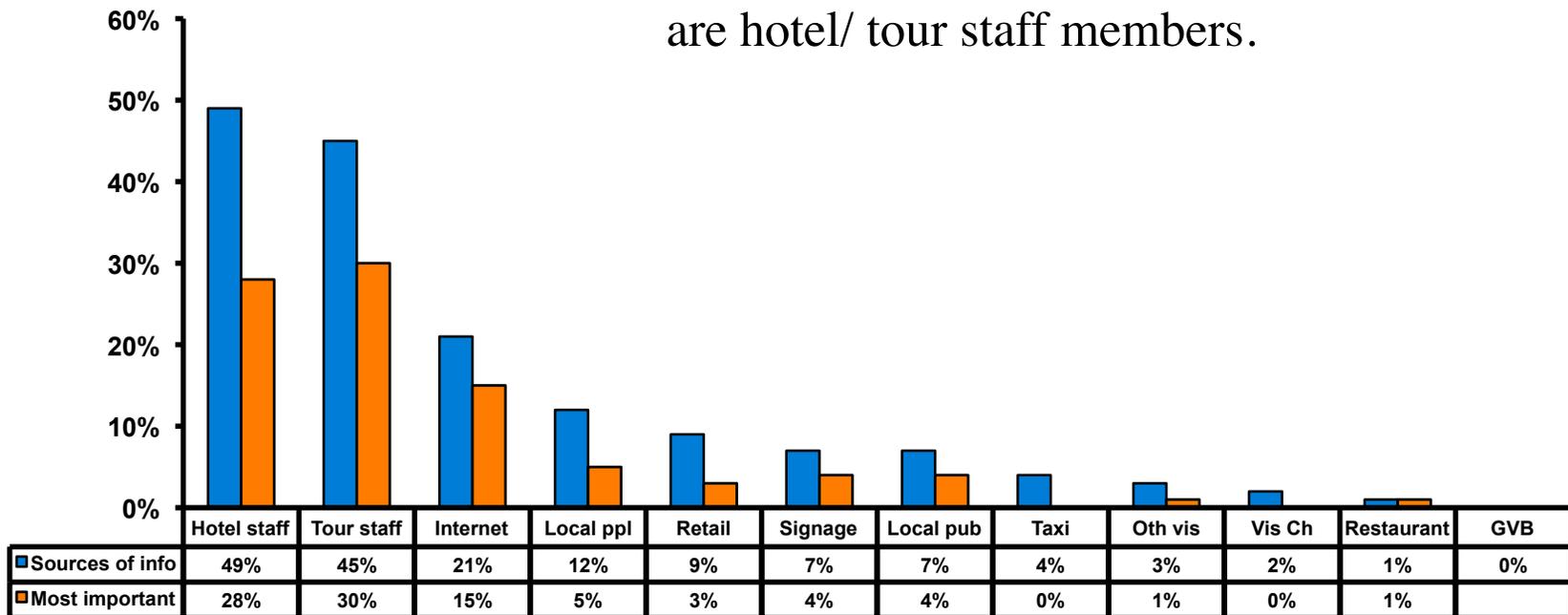
# Sources of Information Pre-arrival

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



# Sources of Information Post-arrival

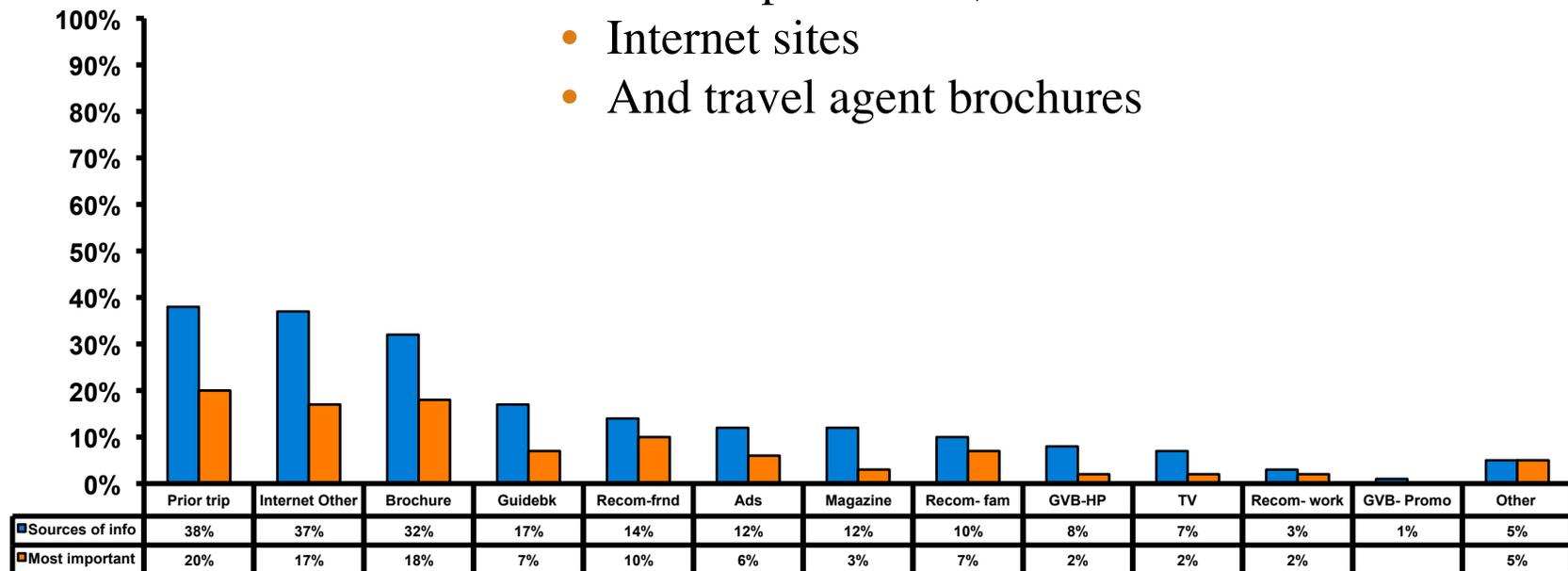
- The primary local source of information are hotel/ tour staff members.



# Sources of Information - Motivation

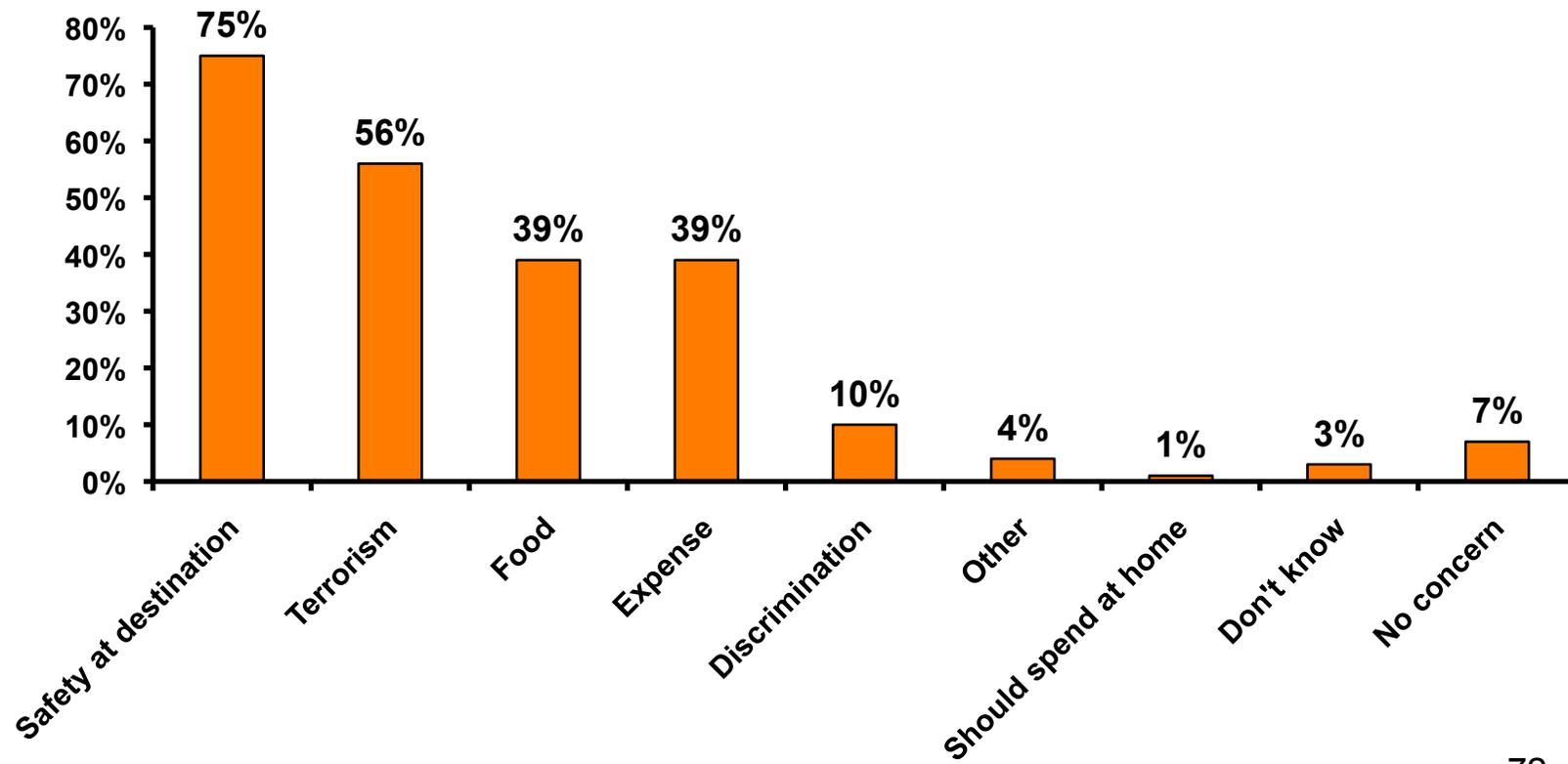
The primary motivational sources of information were.

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



# SECTION 6 **OTHER ISSUES**

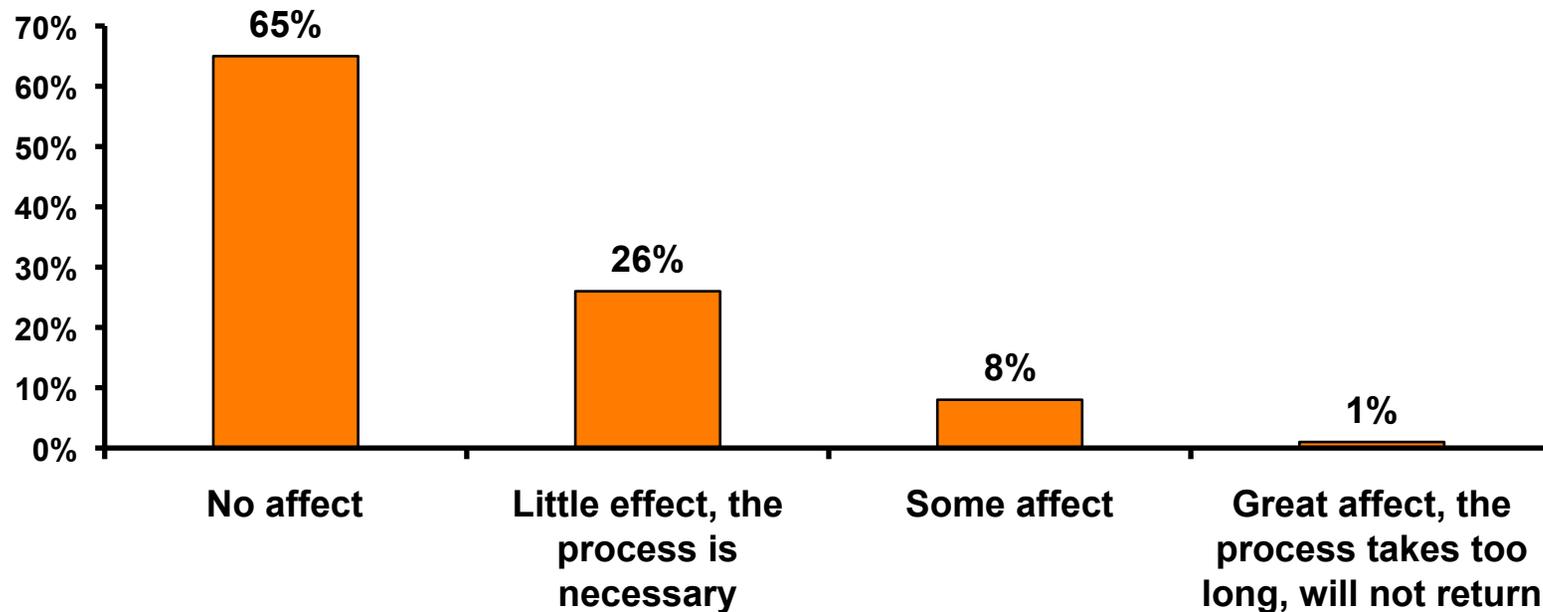
# Concerns about travel outside of Japan - Overall



# 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	75%	78%	73%	76%	76%	92%	80%	72%	77%	79%	77%	78%	40%	
	Terrorism	56%	50%	52%	64%	60%	75%	60%	52%	56%	54%	65%	59%	60%	
	Food	39%	44%	38%	34%	48%	42%	32%	63%	39%	38%	44%	33%	20%	
	Expense	39%	39%	38%	39%	40%	42%	52%	41%	42%	38%	40%	35%	20%	
	Discrimination against Japanese	10%	13%	6%	12%	12%	8%	16%	4%	16%	7%	8%	15%		
	No concerns	7%	5%	5%	10%	12%	8%	4%	13%	4%	4%	6%	9%	40%	
	Other	4%	3%	6%	3%			8%	2%	9%	6%				
	Don't know	3%	3%	5%	2%	2%					3%		2%		
	Should spend at home	1%		1%	1%	2%	8%					2%	2%		
	Total	Count	351	64	132	103	50	12	25	46	57	71	48	46	5

# Security Screening/ Immigration Process at Guam International Airport



# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

