



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013

NOVEMBER 2012



Prepared by: QMark Research

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Background & Methodology

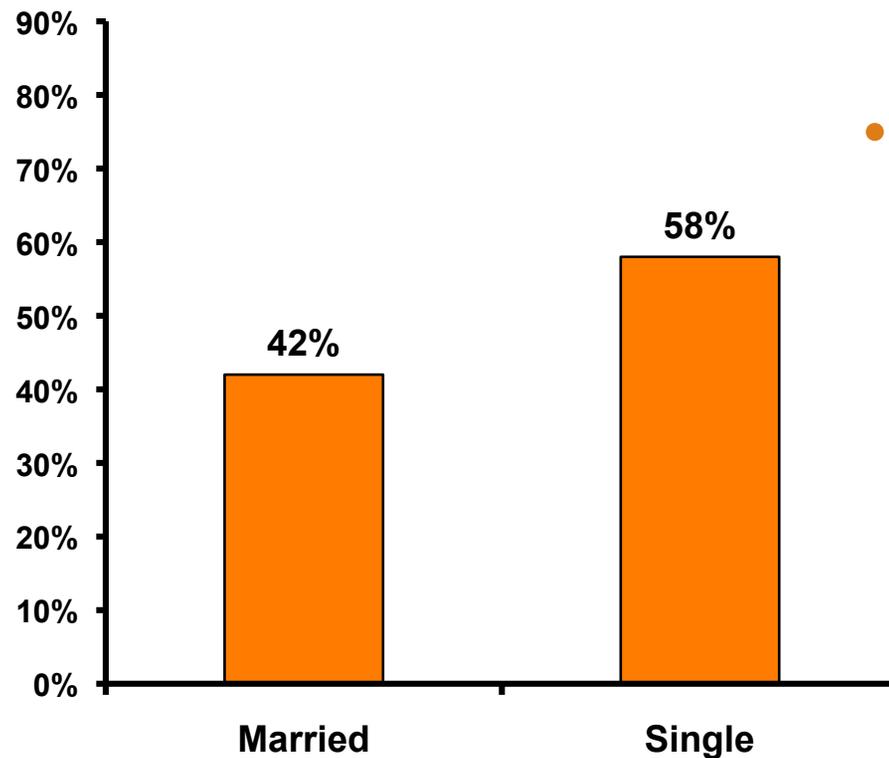
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing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

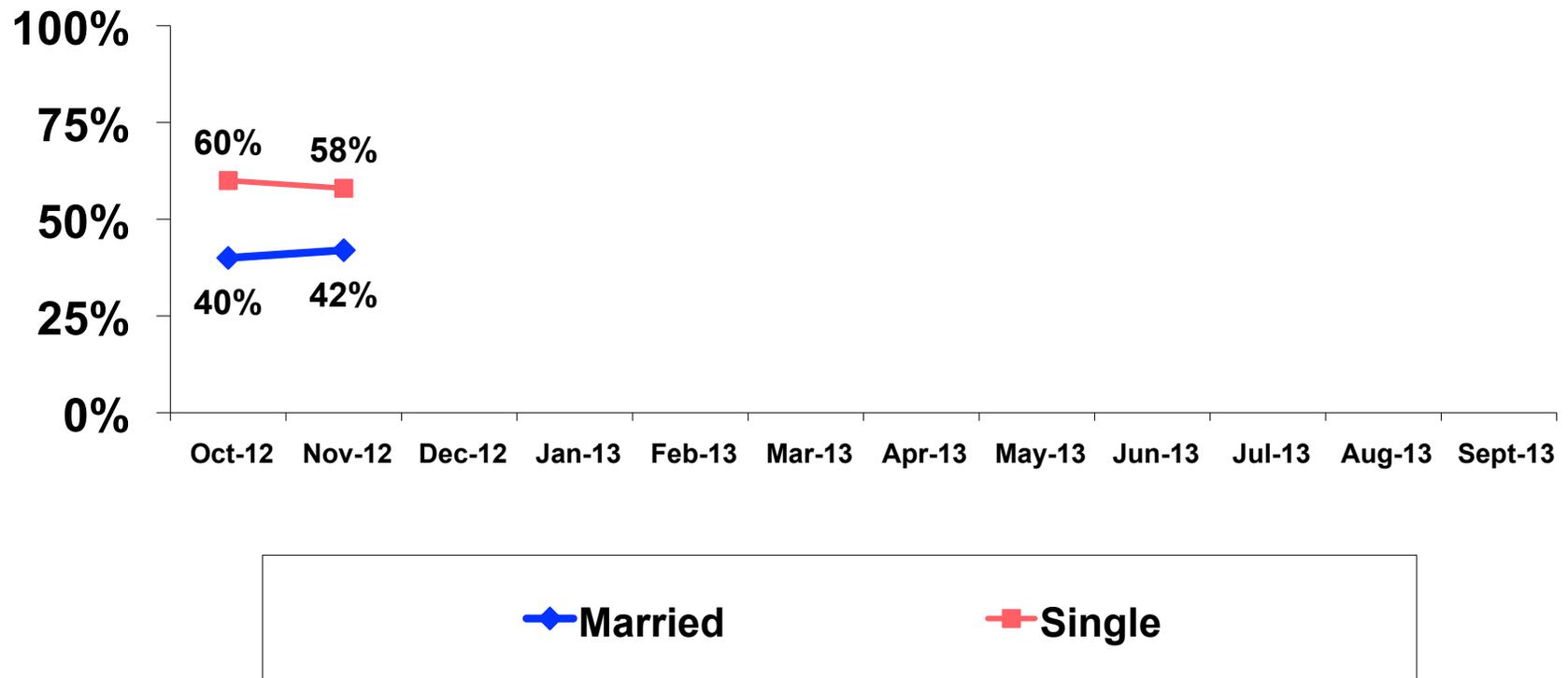
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

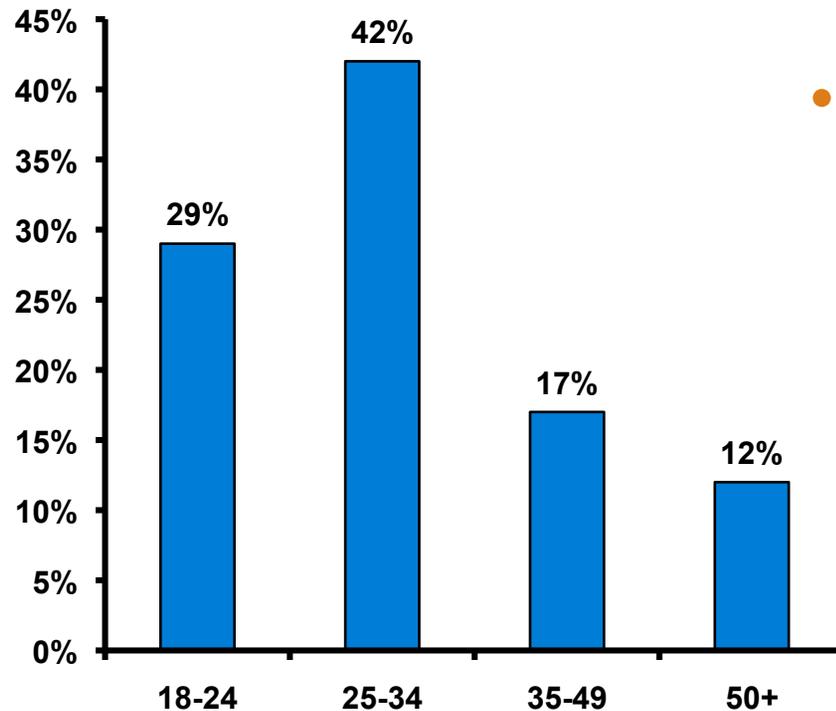


- Majority of first time visitors are single.

Marital Status

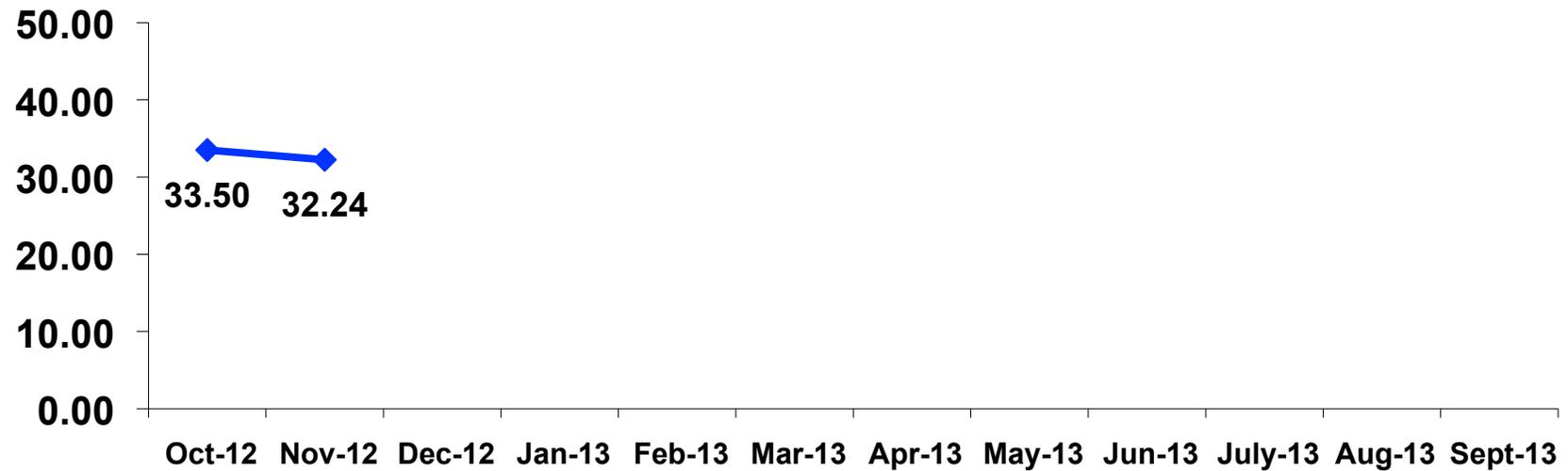


Age - Overall

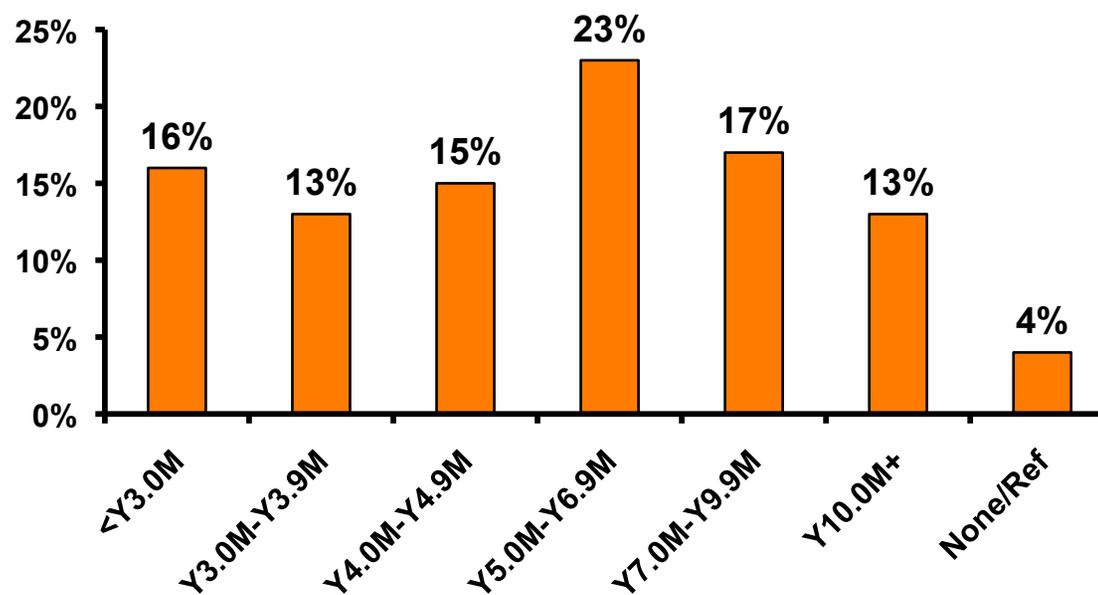


- The average age of the respondents is 32.24 years of age.

Average Age

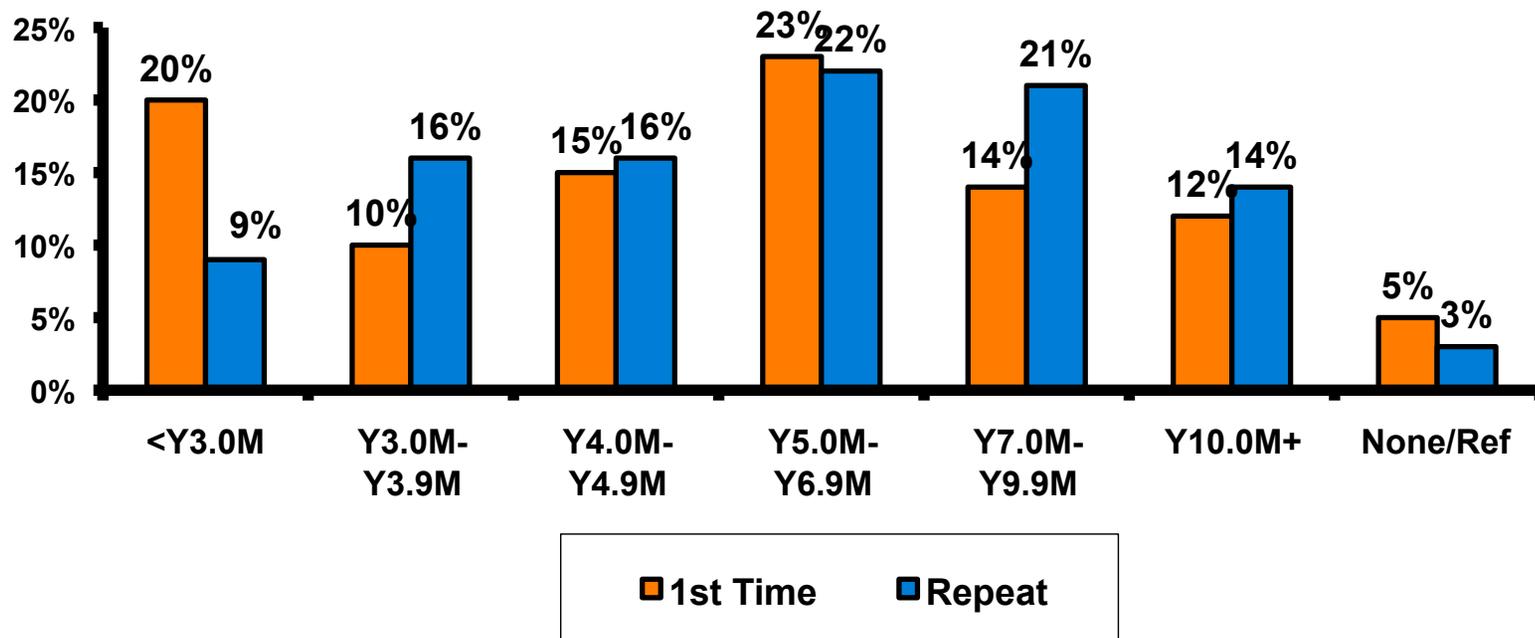


Personal Income



• ¥79.94=\$1

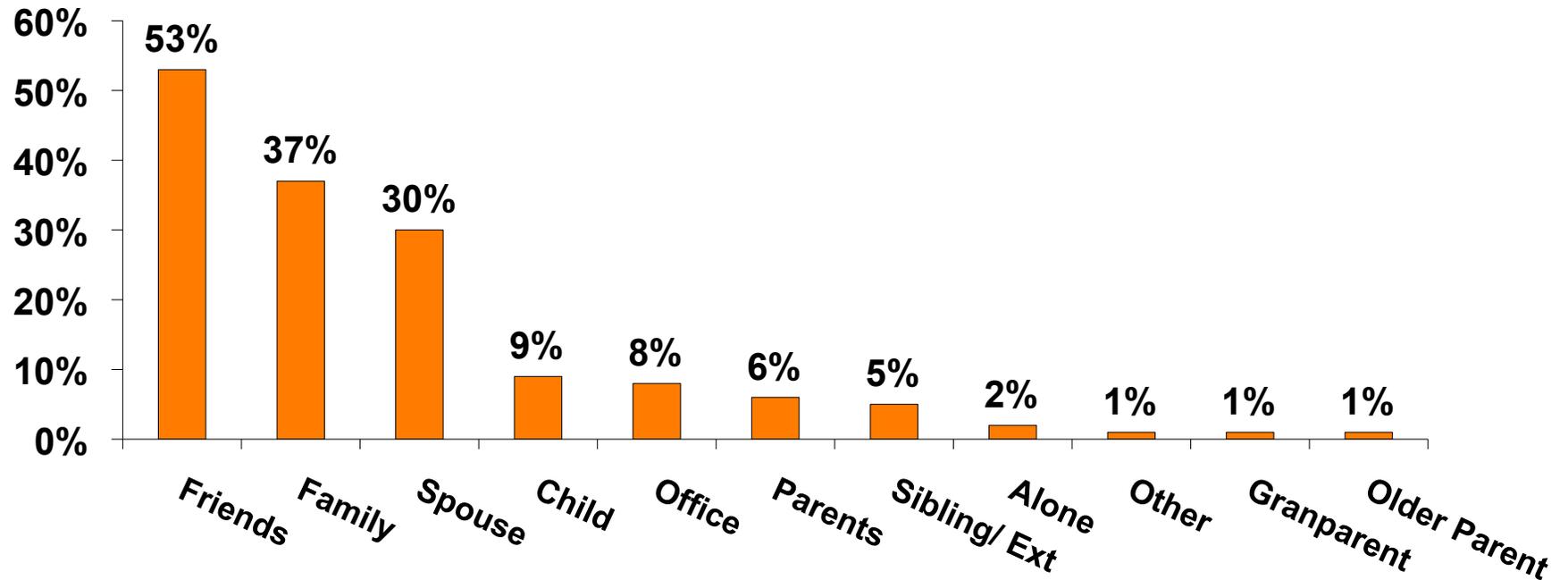
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	17	5	12	10	7		
		Column N %	6%	3%	8%	13%	5%		
	Y2.0M-Y3.0M	Count	31	9	22	9	16	4	2
		Column N %	10%	6%	15%	11%	12%	8%	6%
	Y3.0M-Y4.0M	Count	39	18	21	2	25	8	4
		Column N %	13%	11%	15%	3%	19%	15%	11%
	Y4.0M-Y5.0M	Count	46	22	24	11	27	6	2
		Column N %	15%	14%	17%	14%	20%	12%	6%
	Y5.0M-Y7.0M	Count	68	41	27	20	28	13	7
		Column N %	23%	26%	19%	25%	21%	25%	19%
	Y7.0M-Y10.0M	Count	51	33	18	5	19	14	13
		Column N %	17%	21%	13%	6%	14%	27%	36%
	Y10.0M+	Count	38	23	15	14	9	7	8
		Column N %	13%	15%	10%	18%	7%	13%	22%
	No Income	Count	12	7	5	9	3		
		Column N %	4%	4%	3%	11%	2%		
	Total	Count	302	158	144	80	134	52	36

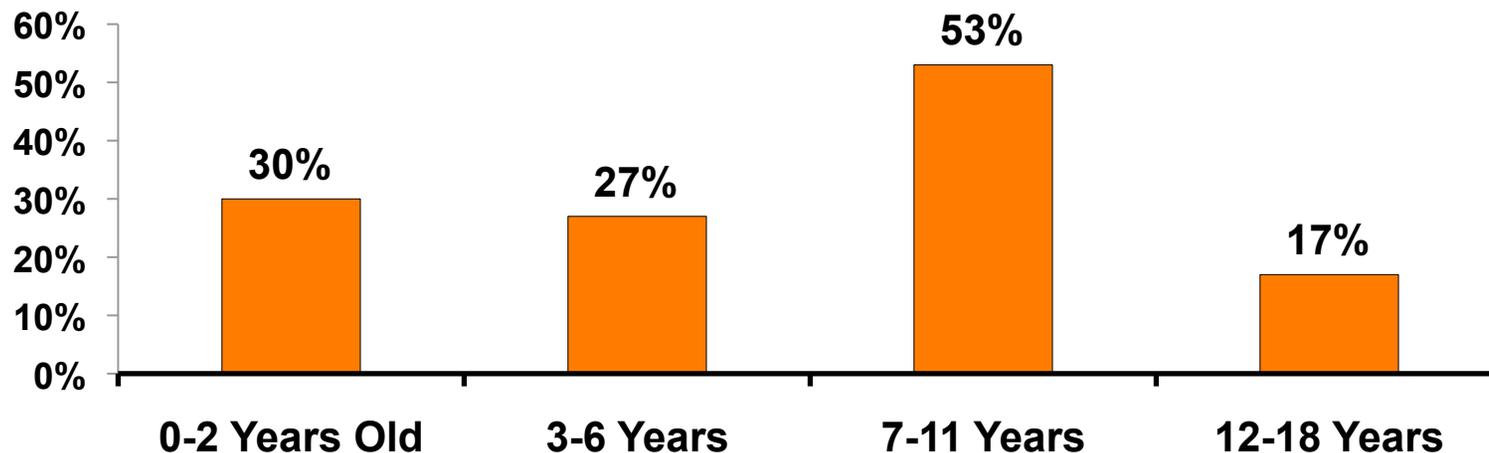
Travel Companions



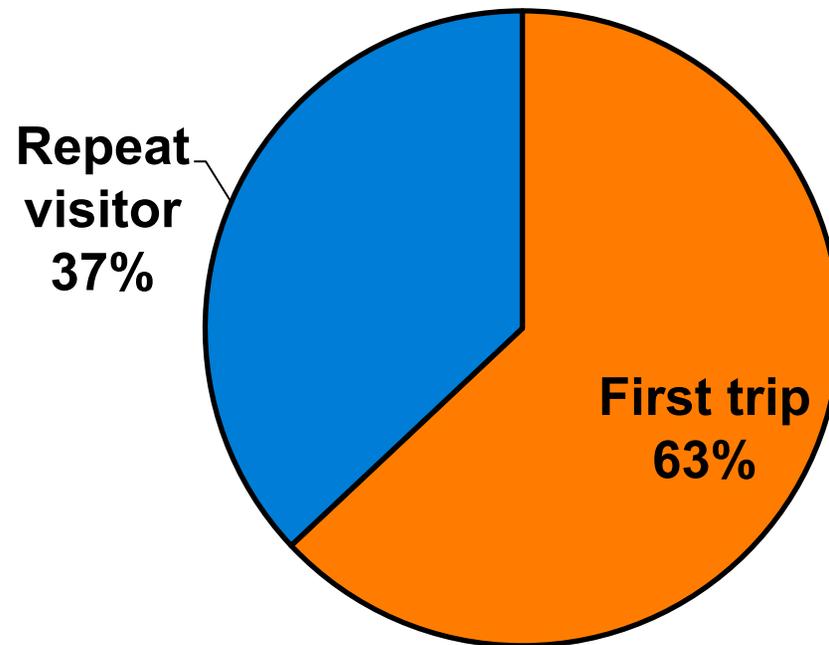
Number of Children Travel Party

N=30 total respondents traveling with children.

(Of those N=30 respondents, there is a total of 43 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



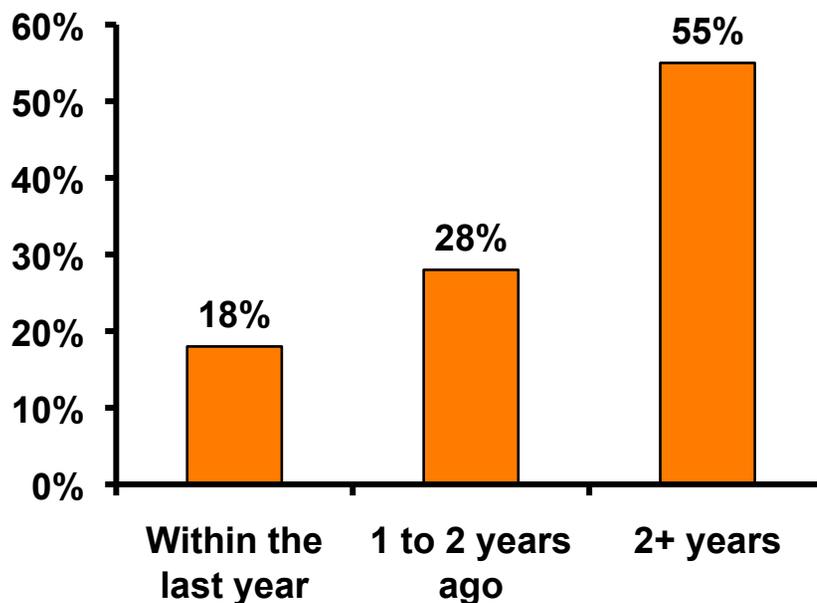
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	176	110	64
		Column N %	50%	51%	49%
	Female	Count	175	107	66
		Column N %	50%	49%	51%
	Total	Count	351	217	130
		Column N %	100%	62%	38%
AGE	18-24	Count	102	80	21
		Column N %	29%	37%	16%
	25-34	Count	147	88	59
		Column N %	42%	41%	46%
	35-49	Count	60	27	32
		Column N %	17%	12%	25%
	50+	Count	41	22	17
		Column N %	12%	10%	13%
	Total	Count	350	217	129

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

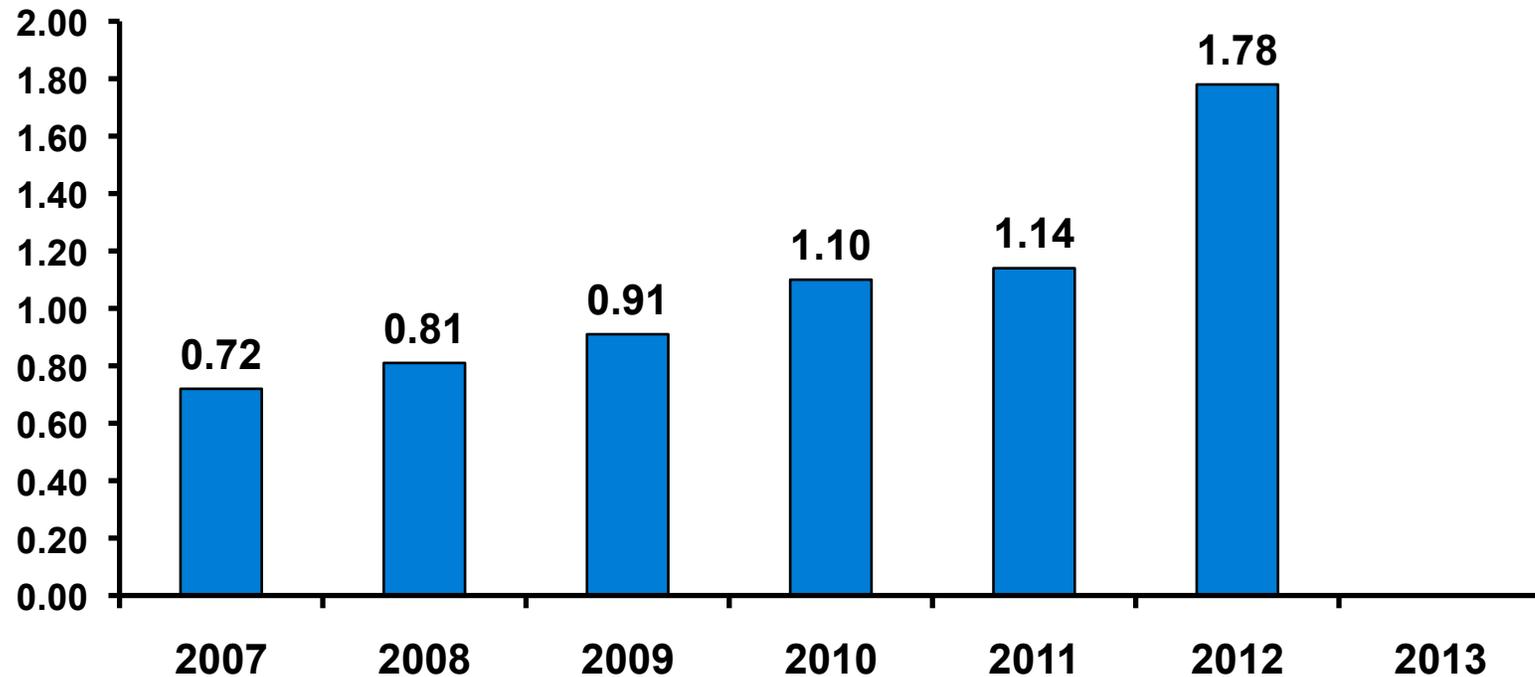
Repeat Visitors Last Trip

n = 141



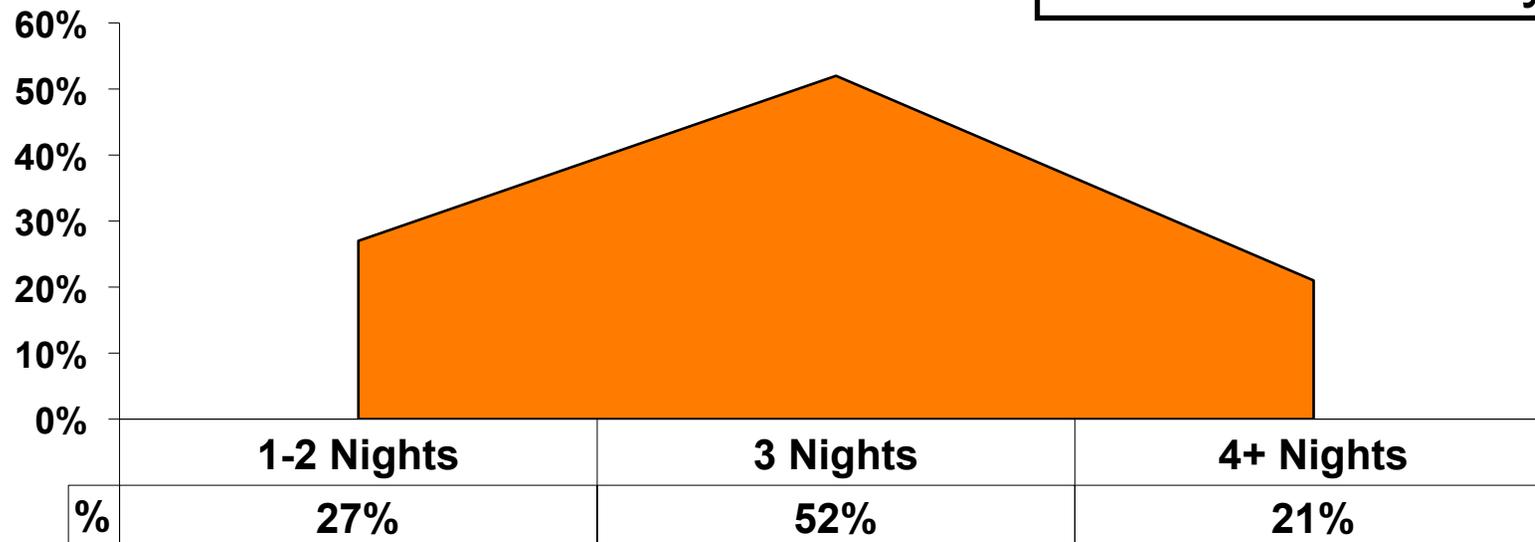
- The average repeat visitor has been to Guam 2.98 times.
- A little less than half the repeat visitors have been to Guam within the last 2 years.

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

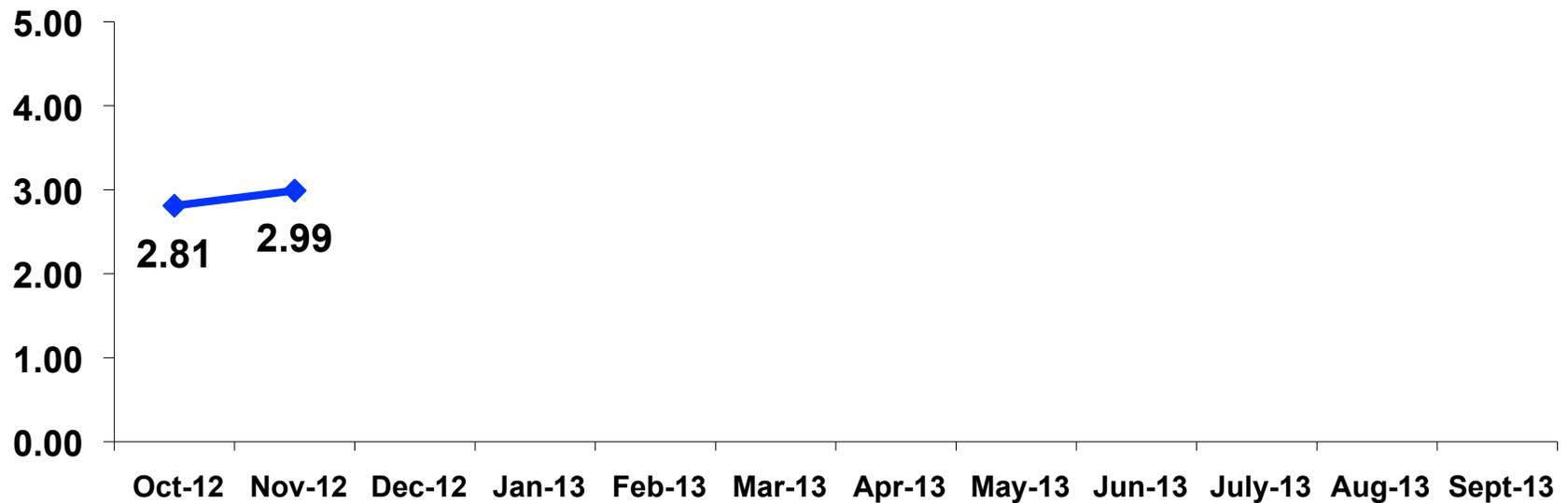


Length of Stay

Mean = 2.99 Days
Median = 3.0 Days



Average Length of Stay

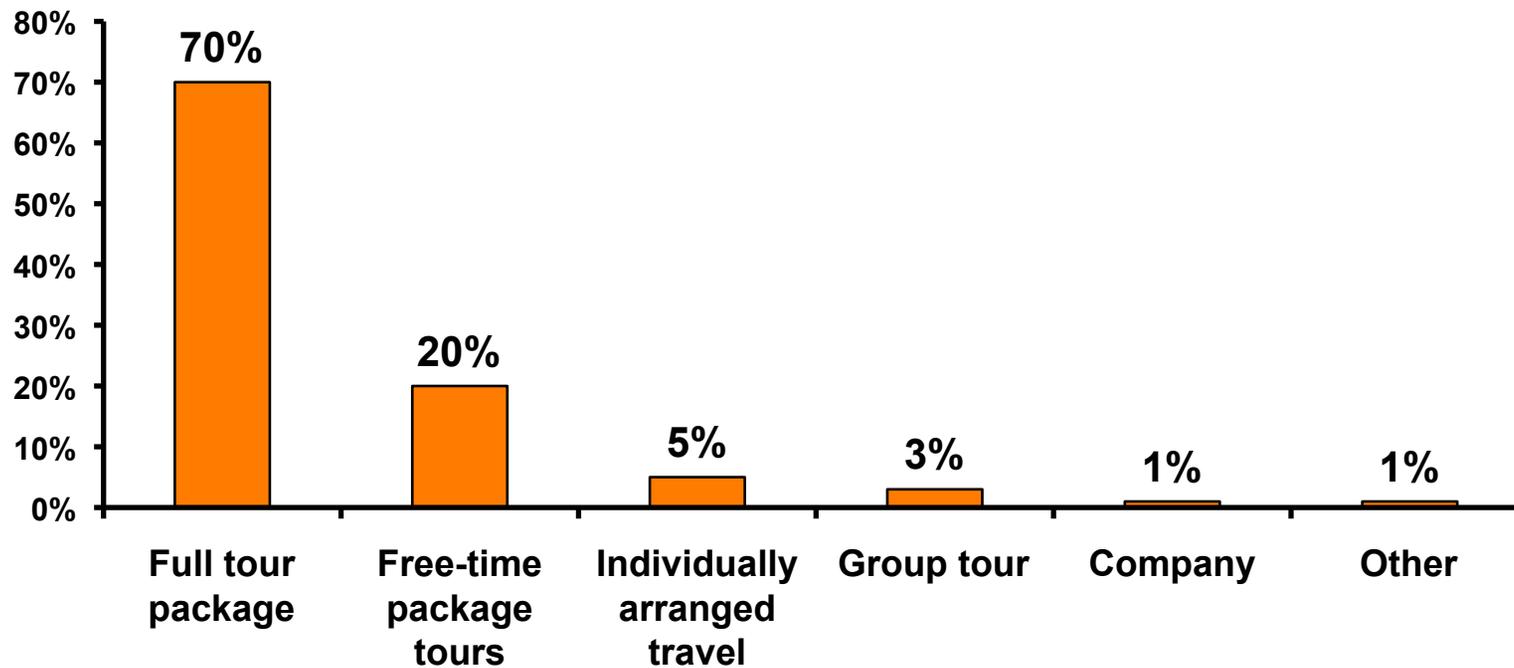


Occupation by Income

	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	24%	44%	13%	5%	22%	21%	8%	30%	100%	
Office worker non-mgr	16%		17%	32%	22%	10%	24%	8%		
Engineer	13%	6%	10%	26%	13%	19%	10%	11%		
Salesperson	11%		13%	11%	9%	18%	18%	5%		
Self-employed	6%		3%	5%	9%	7%	8%	5%		
Other	5%	25%	10%	5%	2%	1%	2%	5%		
Homemaker	5%			11%	4%	4%	8%			
Manager	4%		3%		4%	6%	8%	8%		
Professional/ Specialist	4%			3%	4%	3%	6%	14%		
Skilled worker	4%		13%		2%	4%	4%	3%		
Govt- office worker non-mgr	3%	6%	3%	3%	7%	1%	2%	5%		
Freeter	2%	6%	7%		2%	1%				
Unemployed	1%		7%				2%			
Govt- Manager	1%					3%		3%		
Executive (30+ employees)	1%	6%						3%		
Free-lancer	0%	6%								
Teacher	0%						2%			
Total	Count	337	16	30	38	46	68	51	37	12

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

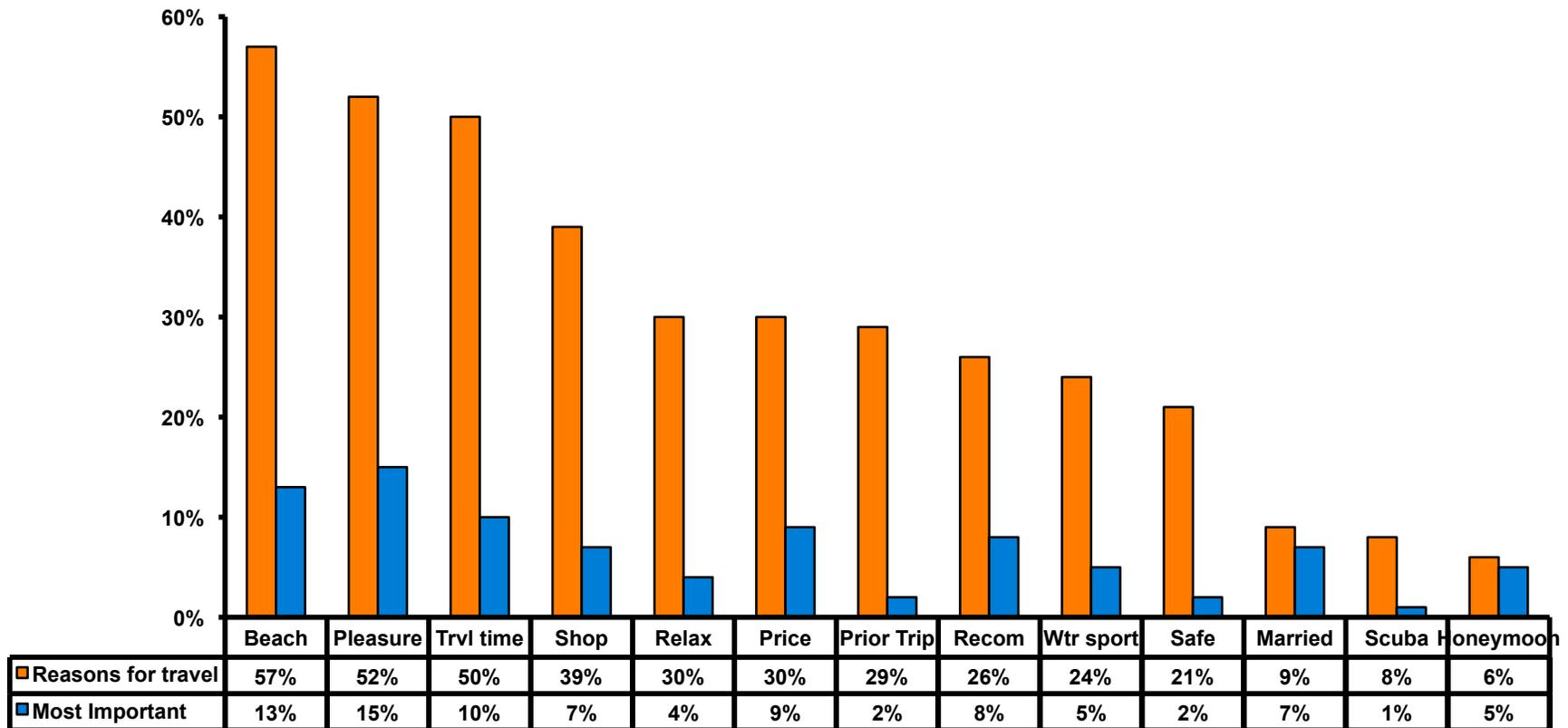


Accommodation by Income

Average length of stay: 2.99 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	18%	29%	32%	10%	15%	22%	14%	11%	8%	
Fiesta Resort Guam	10%	12%	16%	10%	22%	12%	4%	11%	8%	
PIC Club	9%	18%	6%	15%	7%	9%	12%	8%		
Grand Plaza Hotel	7%		3%	5%	9%	3%	4%	16%	25%	
Oceanview Hotel	6%	6%	3%	3%	4%	10%	6%	5%	17%	
Hotel Nikko Guam	6%		10%	13%			3%	4%	8%	
Pacific Bay Hotel	5%	6%	6%	3%	2%	1%	6%	11%		
Hotel Santa Fe	5%	12%	6%	3%			4%	4%	5%	
Westin Resort Guam	4%		3%	3%	2%	4%	10%	8%		
Outrigger Guam Resort	4%	6%	3%	5%	7%	1%	10%			
Leo Palace Resort	4%				4%	9%	8%			
Onward Beach Resort	4%			3%	7%	4%	8%	3%		
Sheraton Laguna Guam	3%		3%	3%	4%	3%	4%	5%		
Holiday Resort Guam	3%		3%	10%	2%	1%		3%	8%	
Hilton Guam Resort	3%			3%	7%	4%	2%	3%		
Guam Reef Hotel	2%	6%		5%	2%		2%	3%		
Hyatt Regency Guam	2%			3%			2%	3%		
Bayview Hotel	1%	6%	3%				2%			
Other	1%			3%	2%				8%	
Royal Orchid Guam	1%					3%				
Tumon Bay Capital Hotel	1%			3%	2%					
Guam Marriott Resort	0%				2%					
Total	Count	351	17	31	39	46	68	51	38	12

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Pleasure,
- Guam's natural beauty/ beaches,
- 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%	65%	56%	45%	56%	59%	55%	
	Pleasure	52%	75%	46%	40%	34%	48%	55%	
	Short travel time	50%	42%	54%	55%	44%	53%	47%	
	Shopping	39%	48%	38%	27%	37%	32%	46%	
	Relax	30%	28%	35%	28%	22%	32%	29%	
	Price	30%	31%	32%	27%	24%	30%	30%	
	Previous trip	29%	20%	33%	35%	29%	27%	31%	
	Recomm- friend/family/trvl agnt	26%	44%	23%	10%	12%	20%	31%	
	Water sports	24%	35%	23%	12%	17%	19%	29%	
	Safe	21%	24%	16%	25%	29%	23%	19%	
	Married/ Attn wedding	9%	1%	11%	12%	17%	11%	6%	
	Scuba	8%	5%	11%	5%	5%	9%	6%	
	Honeymoon	6%		12%	3%	2%	10%	1%	
	Company/ Business Trip	6%	2%	7%	7%	7%	5%	7%	
	Other	5%	4%	5%	8%	5%	7%	3%	
	Golf	3%		3%	3%	7%	4%	2%	
	Visit friends/ Relatives	3%	4%	1%	3%	2%	2%	3%	
	Organized sports	2%	4%	3%			1%	3%	
	Company Sponsored	0%			2%		1%		
	Total	Count	351	102	147	60	41	176	175

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%	71%	65%	56%	50%	46%	65%	58%	75%	
Pleasure	52%	71%	45%	46%	52%	56%	45%	58%	67%	
Short travel time	50%	41%	42%	51%	48%	47%	61%	53%	50%	
Shopping	39%	29%	39%	33%	41%	41%	49%	34%	33%	
Relax	30%	35%	23%	28%	33%	29%	41%	26%	50%	
Price	30%	29%	29%	31%	30%	29%	37%	24%	25%	
Previous trip	29%	12%	23%	38%	37%	25%	39%	32%	25%	
Recomm- friend/family/trvl agnt	26%	53%	29%	13%	35%	21%	16%	29%	50%	
Water sports	24%	24%	23%	15%	30%	22%	22%	21%	25%	
Safe	21%	29%	13%	21%	15%	18%	29%	32%	42%	
Married/ Attn wedding	9%		10%	15%	11%	12%	4%	3%		
Scuba	8%	18%	10%	8%	7%	7%	2%	11%	25%	
Honeymoon	6%		10%	10%	7%	12%		3%		
Company/ Business Trip	6%	18%	13%	8%		7%	6%	5%		
Other	5%		10%	3%	4%	3%	12%	5%	17%	
Golf	3%			3%		6%	6%	3%		
Visit friends/ Relatives	3%			5%	2%	4%	2%	5%		
Organized sports	2%		3%	3%		3%	2%	3%	8%	
Company Sponsored	0%					1%				
Total	Count	351	17	31	39	46	68	51	38	12

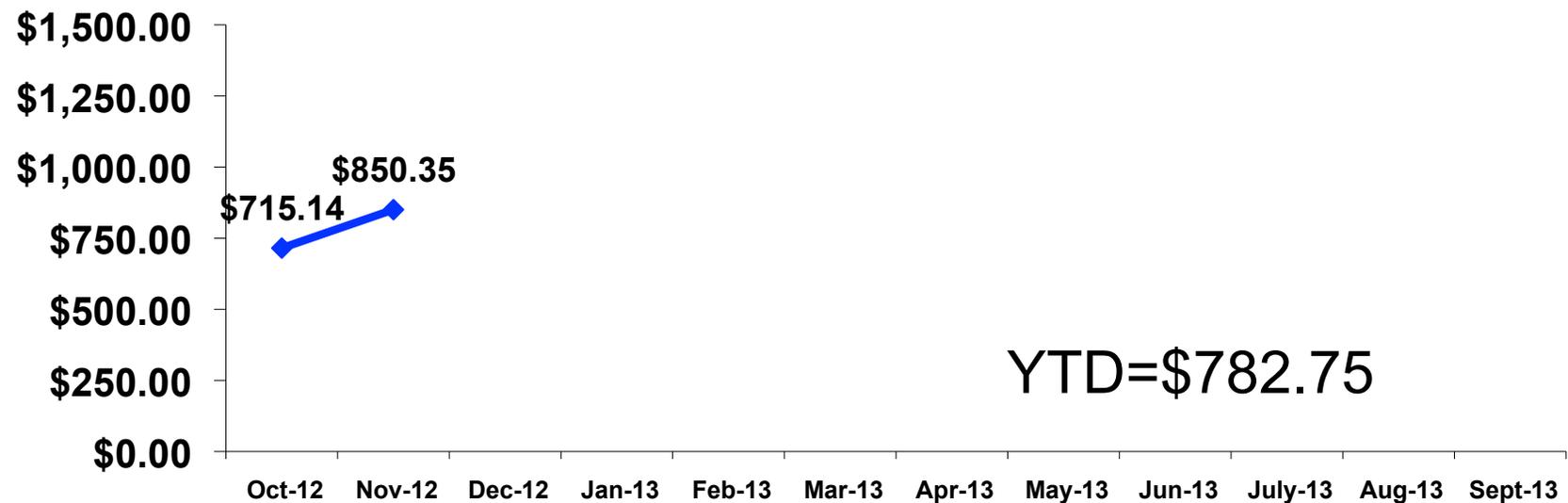
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥79.94/US\$1

- \$1,523.90 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$31,273 = maximum (highest amount recorded for the entire sample)
- \$850.35 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

¥79.94=\$1

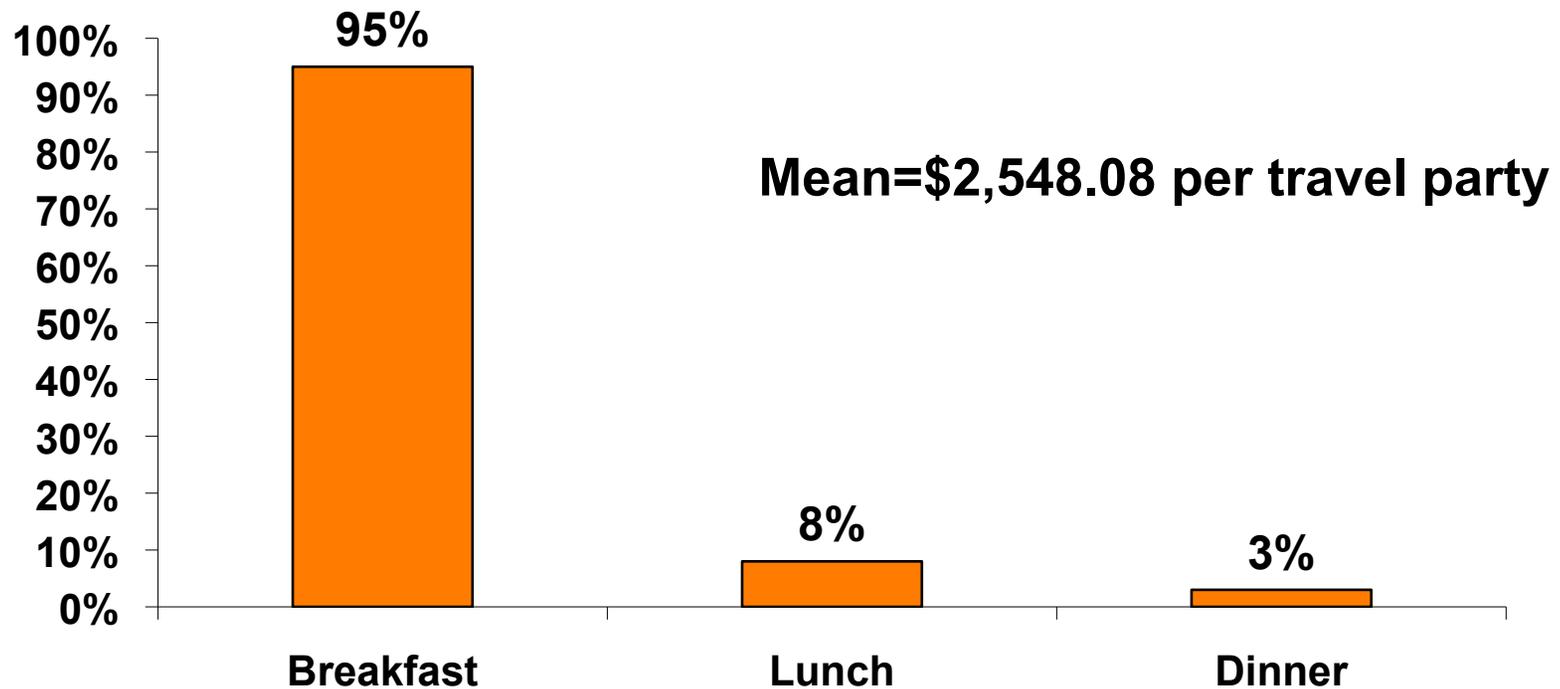
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,322.15
Air & Accommodation w/ daily meal package	\$2,548.08
Air only	\$1,279.53
Accommodation only	\$261.13
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$125.09
Ground transportation- Japan	\$84.77
Ground transportation- Guam	\$124.56
Optional tours/ activities	\$303.25
Other expenses	\$1,213.20
Total Prepaid	\$1,523.90

Prepaid Meal Breakdown

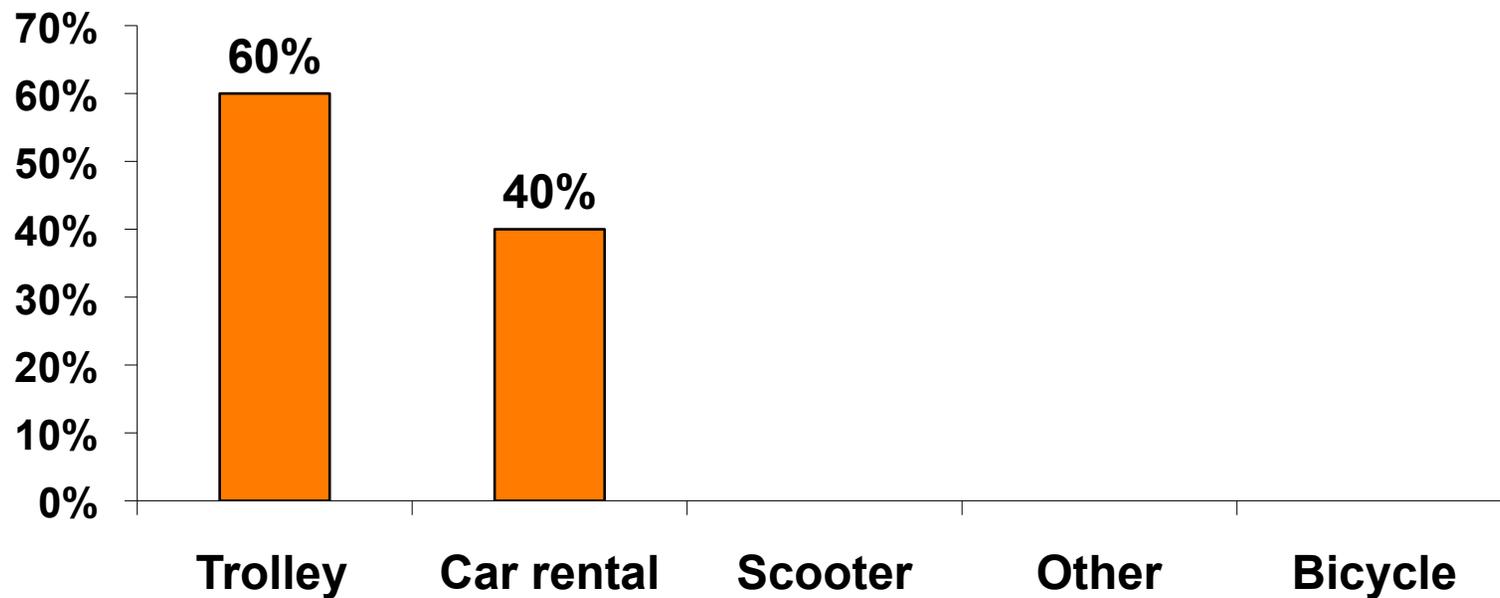
Air/ Accommodations with Daily Meal Package

n=63



Prepaid Ground Transportation

n=5

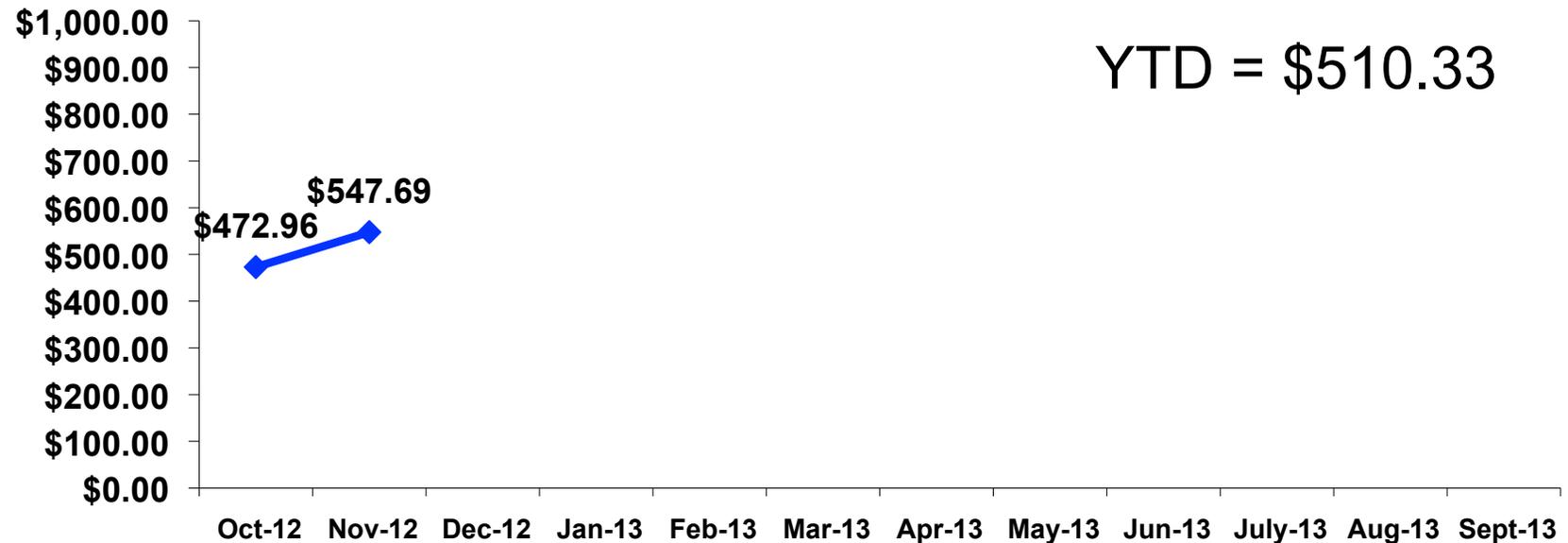


Mean=\$124.56 per travel party

On-Island Expenditures

- \$845.60 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$12,000 = Maximum (highest amount recorded for the entire sample)
- \$547.69 = overall mean average per person on-island expenditure

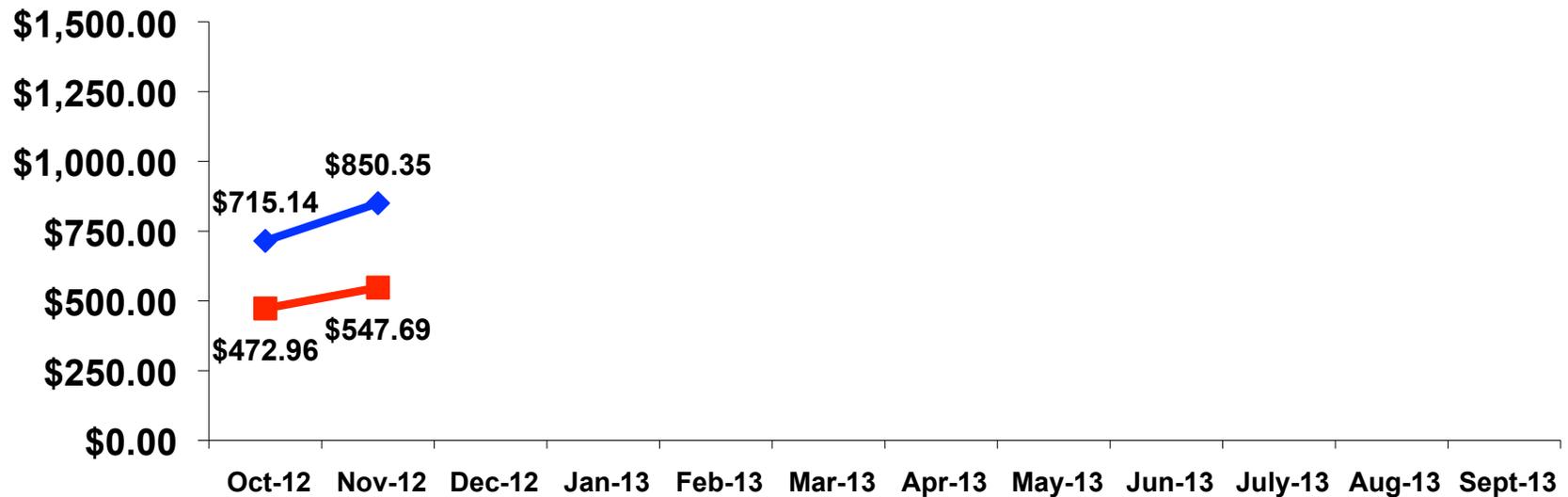
On-Island Expenditures Per Person



Prepaid / On-Island Expenditures Per Person

Prepaid YTD = \$782.75

On-Island YTD = \$510.33



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	\$547.69	\$542.59	\$552.82	\$431.13	\$552.90	\$448.58	\$737.50	\$549.09	\$572.32	\$430.64	\$715.44
	Median	\$400	\$400	\$433	\$355	\$443	\$333	\$485	\$465	\$432	\$315	\$600
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$6,000	\$6,000	\$4,600	\$2,400	\$2,400	\$1,500	\$6,000	\$2,150	\$4,600	\$1,053	\$1,630

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$28.77	\$50.27	\$7.14	\$8.67	\$26.48	\$41.45	\$69.12
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$34.22	\$39.04	\$29.37	\$26.79	\$36.45	\$38.28	\$38.85
	Median	\$10	\$10	\$2	\$10	\$4	\$10	\$10
F&B RESTRNT	Mean	\$90.59	\$123.56	\$57.43	\$47.88	\$112.12	\$78.62	\$139.34
	Median	\$30	\$70	\$20	\$30	\$50	\$20	\$40
OPT TOUR	Mean	\$95.08	\$102.99	\$87.13	\$76.59	\$89.00	\$133.02	\$107.02
	Median	\$0	\$0	\$0	\$45	\$0	\$0	\$0
GIFT- SELF	Mean	\$233.66	\$282.52	\$184.53	\$127.24	\$241.56	\$221.82	\$484.63
	Median	\$50	\$50	\$50	\$50	\$50	\$50	\$100
GIFT- OTHER	Mean	\$126.15	\$131.72	\$120.55	\$106.23	\$122.18	\$131.98	\$183.76
	Median	\$60	\$61	\$50	\$50	\$56	\$95	\$100
TRANS	Mean	\$16.95	\$19.36	\$14.51	\$10.00	\$15.10	\$32.52	\$18.46
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$218.66	\$245.63	\$191.54	\$172.86	\$250.00	\$210.70	\$237.20
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$845.60	\$996.34	\$693.99	\$573.24	\$899.03	\$894.05	\$1,268.63
	Median	\$600	\$700	\$500	\$455	\$683	\$650	\$1,000

On-Island Expenditures

First Timers & Repeaters

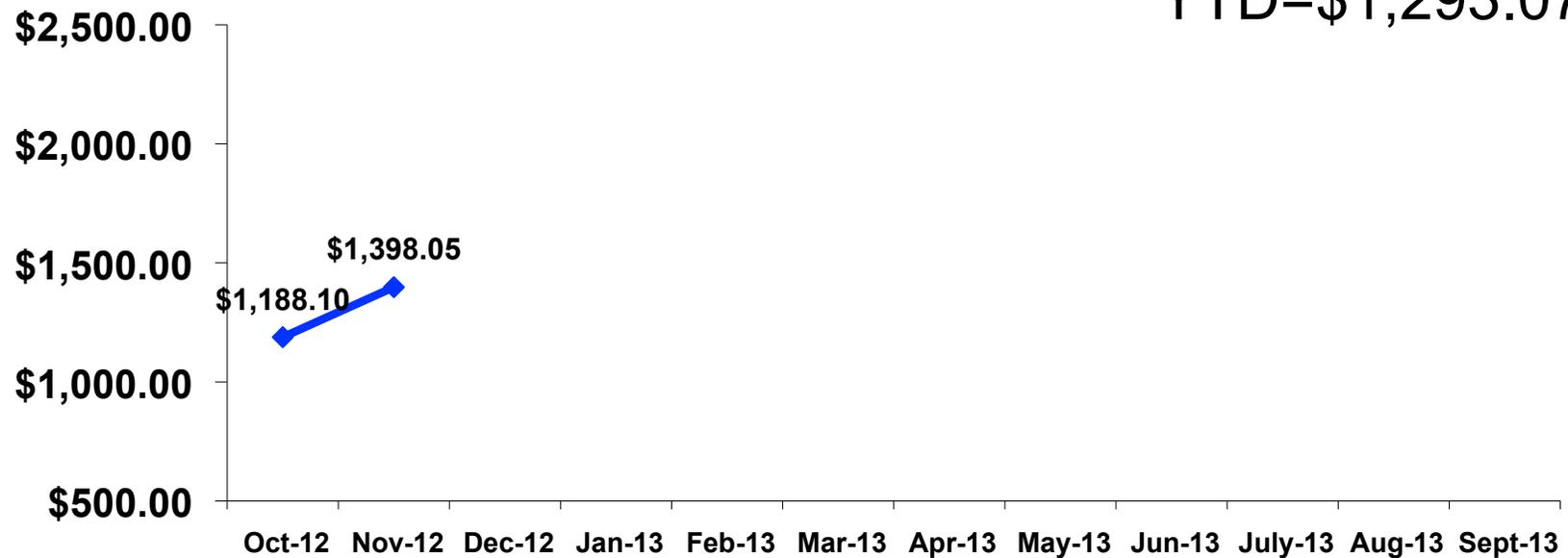
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$28.77	\$32.75	\$22.77
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$34.22	\$34.21	\$35.06
	Median	\$10	\$10	\$9
F&B RESTRNT	Mean	\$90.59	\$85.15	\$100.08
	Median	\$30	\$30	\$30
OPT TOUR	Mean	\$95.08	\$94.68	\$92.85
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$233.66	\$164.48	\$354.41
	Median	\$50	\$40	\$100
GIFT- OTHER	Mean	\$126.15	\$112.18	\$152.48
	Median	\$60	\$59	\$80
TRANS	Mean	\$16.95	\$11.36	\$26.25
	Median	\$0	\$0	\$0
OTHER	Mean	\$218.66	\$181.75	\$268.61
	Median	\$0	\$0	\$0
TOTAL	Mean	\$845.60	\$713.44	\$1,061.83
	Median	\$600	\$580	\$700

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,398.05 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,126 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

YTD=\$1,293.07

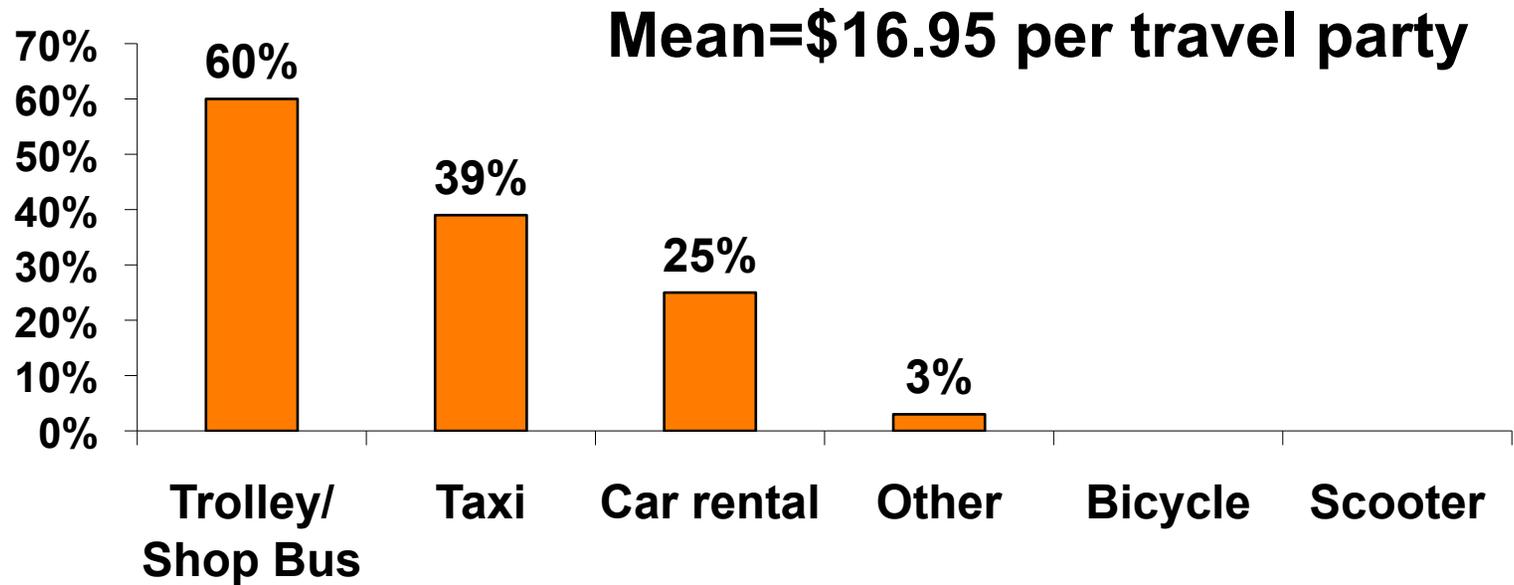


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$28.77
Food & beverage in fast food restaurant/ convenience store	\$34.22
Food & beverage at restaurants or drinking establishments outside a hotel	\$90.59
Optional tours and activities	\$95.08
Gifts/ souvenirs for yourself/companions	\$233.66
Gifts/ souvenirs for friends/family at home	\$126.15
Local transportation	\$16.95
Other expenses not covered	\$218.66
Average Total	\$845.60

Local Transportation

n=67



Guam Airport Expenditures

- \$27.24 = Mean
- \$2 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$800 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

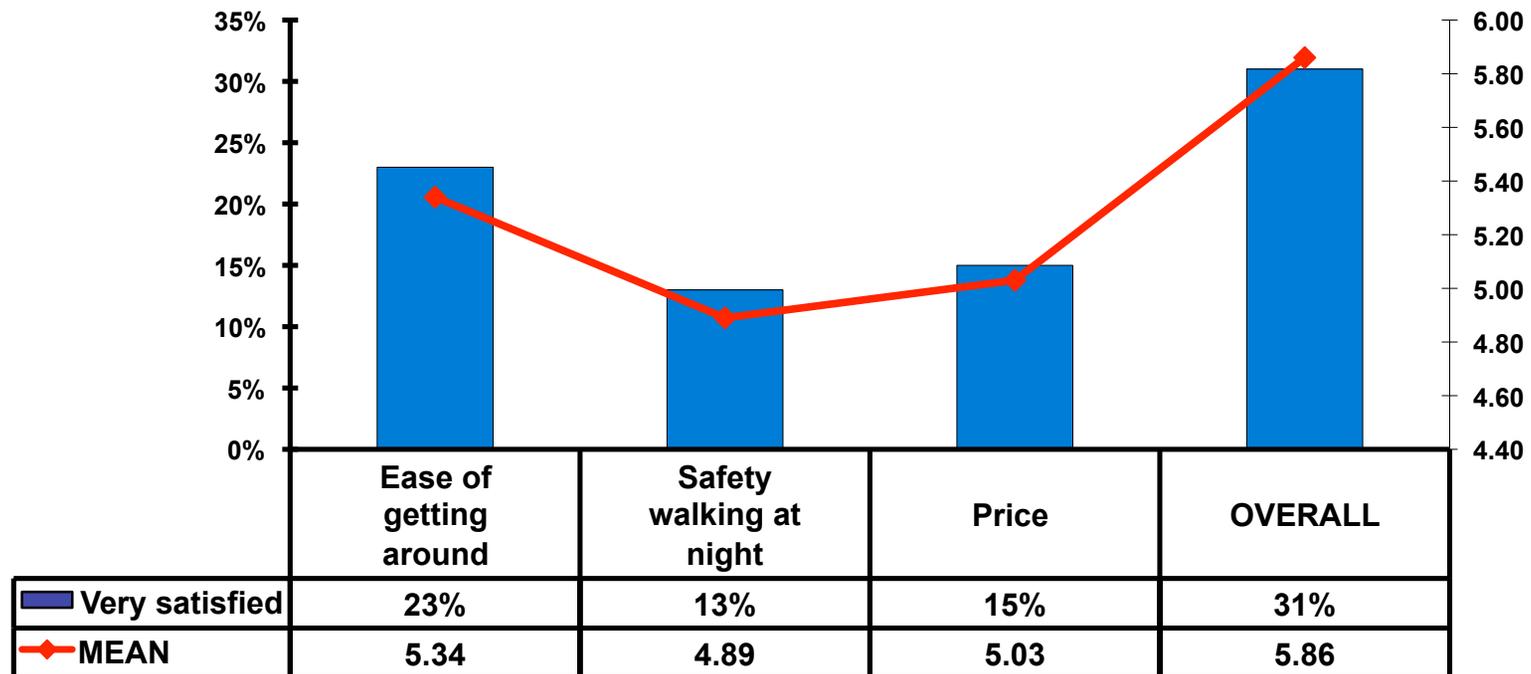
	MEAN \$
Food & Beverages	\$10.16
Gifts/Souvenirs Self	\$8.86
Gifts/Souvenirs Others	\$8.79
Total	\$27.24

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

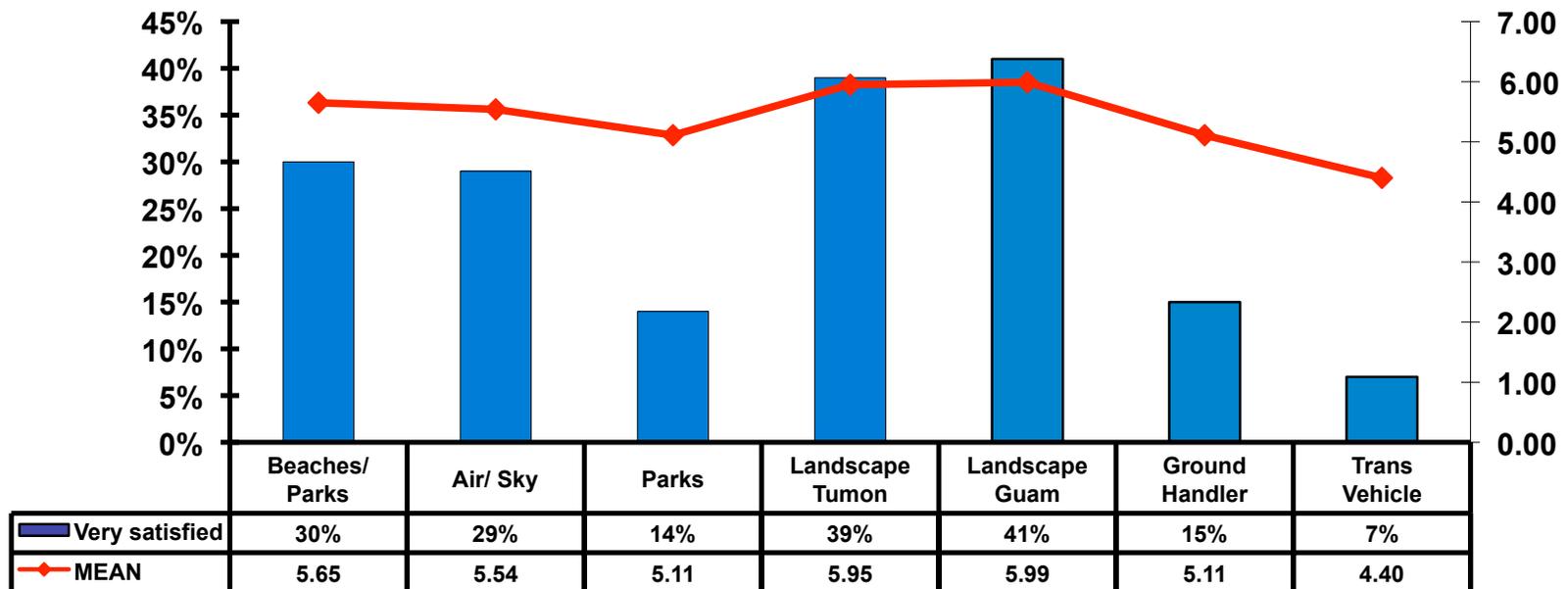
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

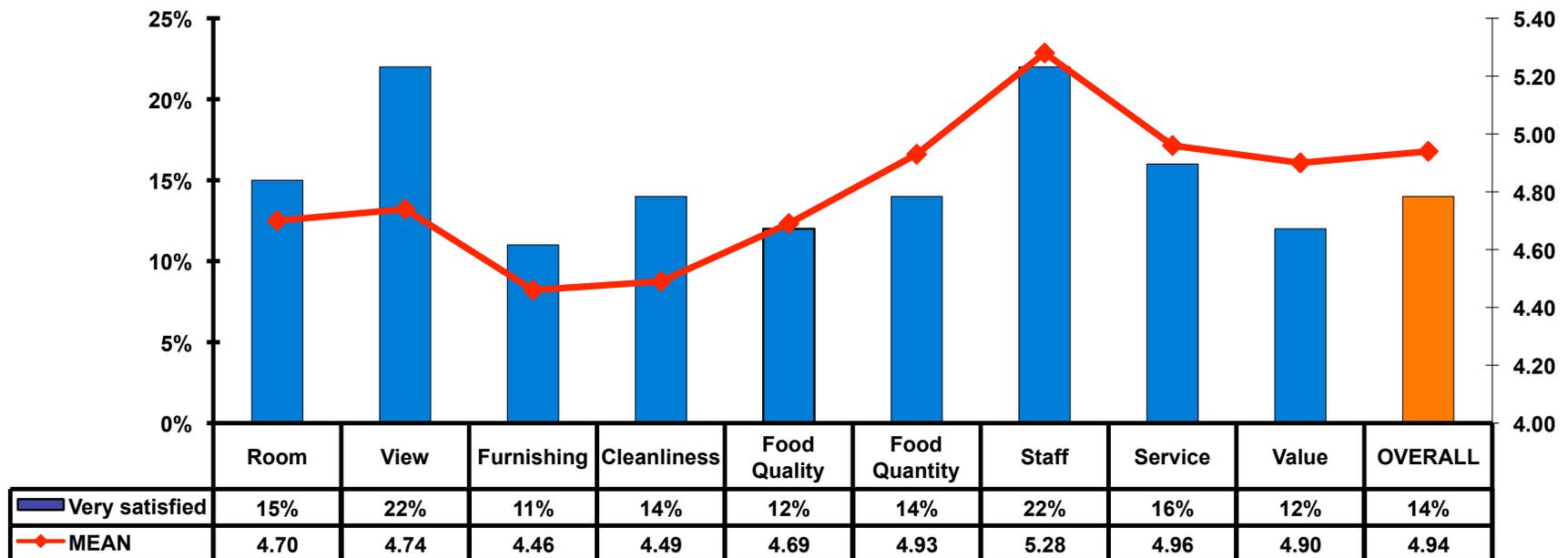
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

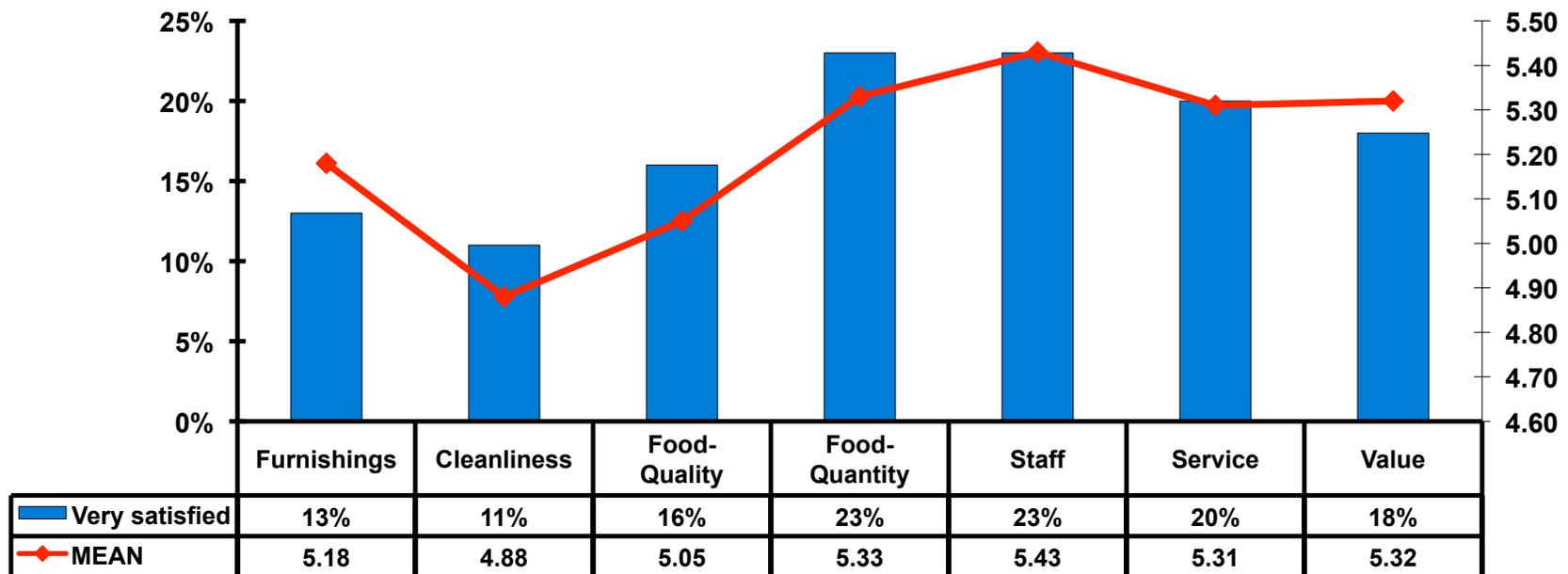
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

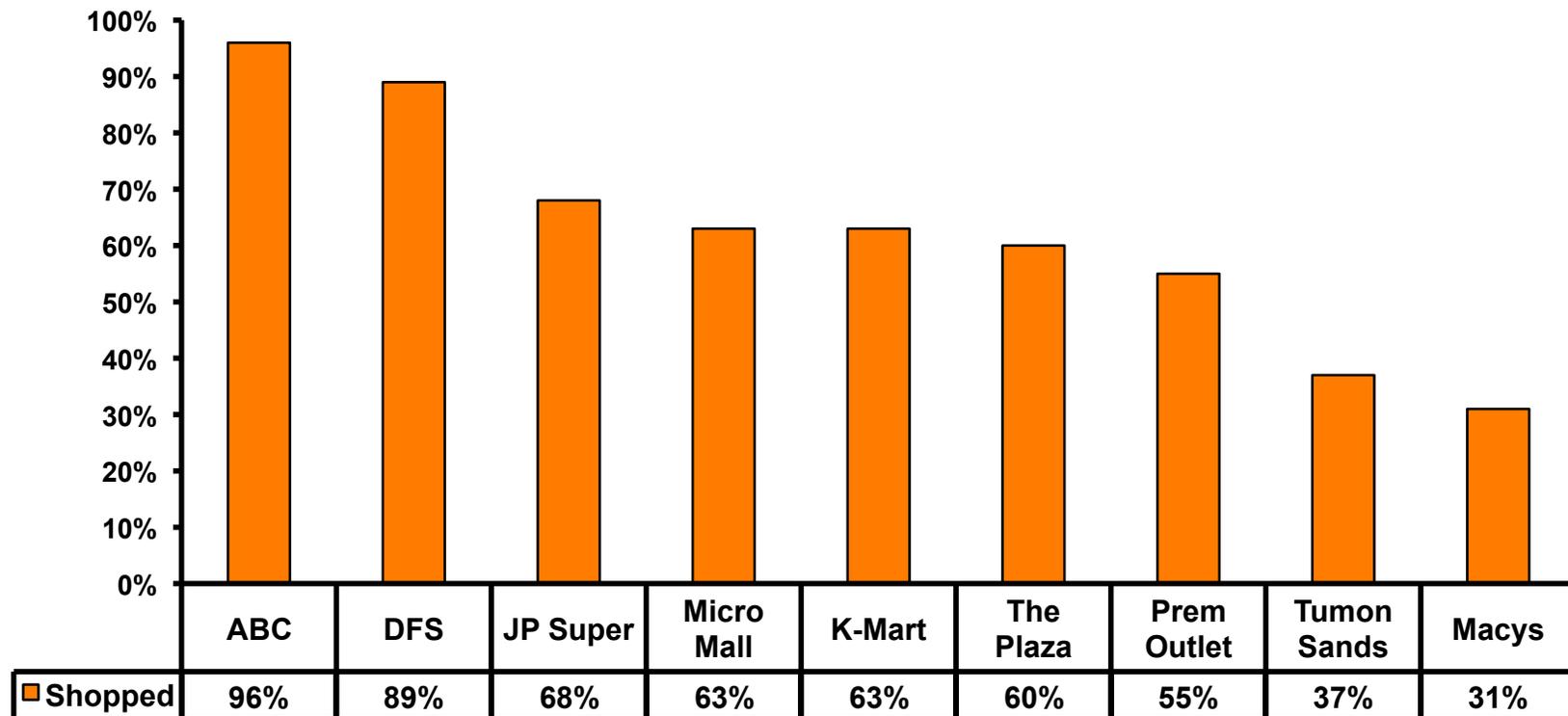
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

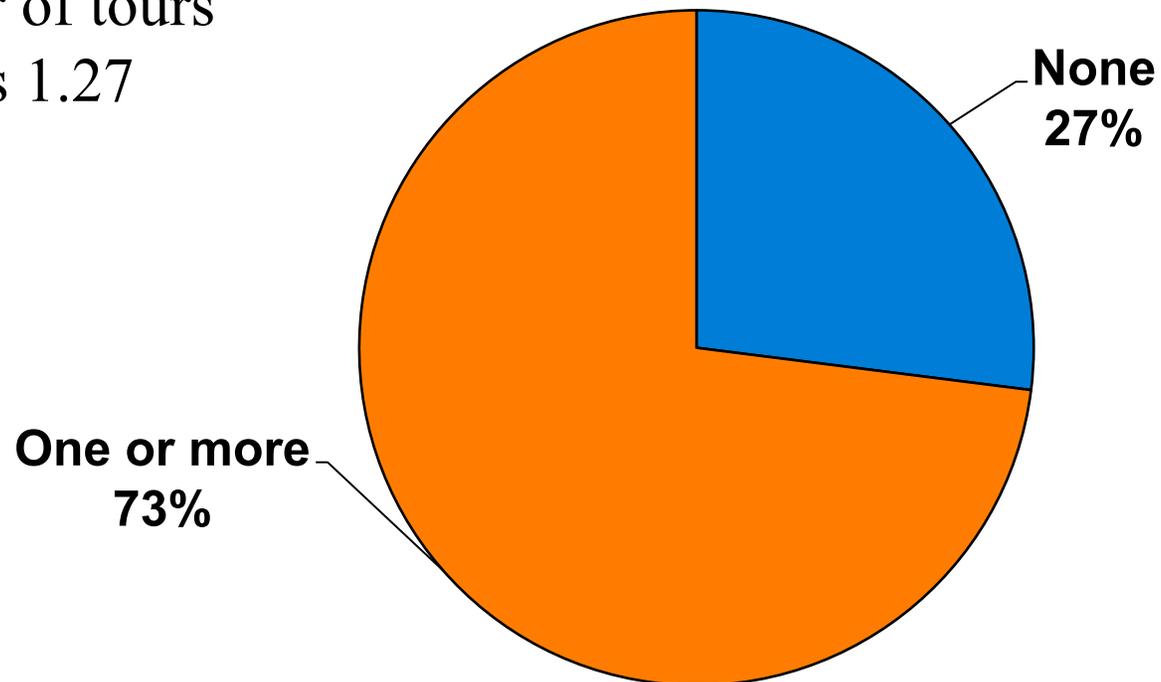
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

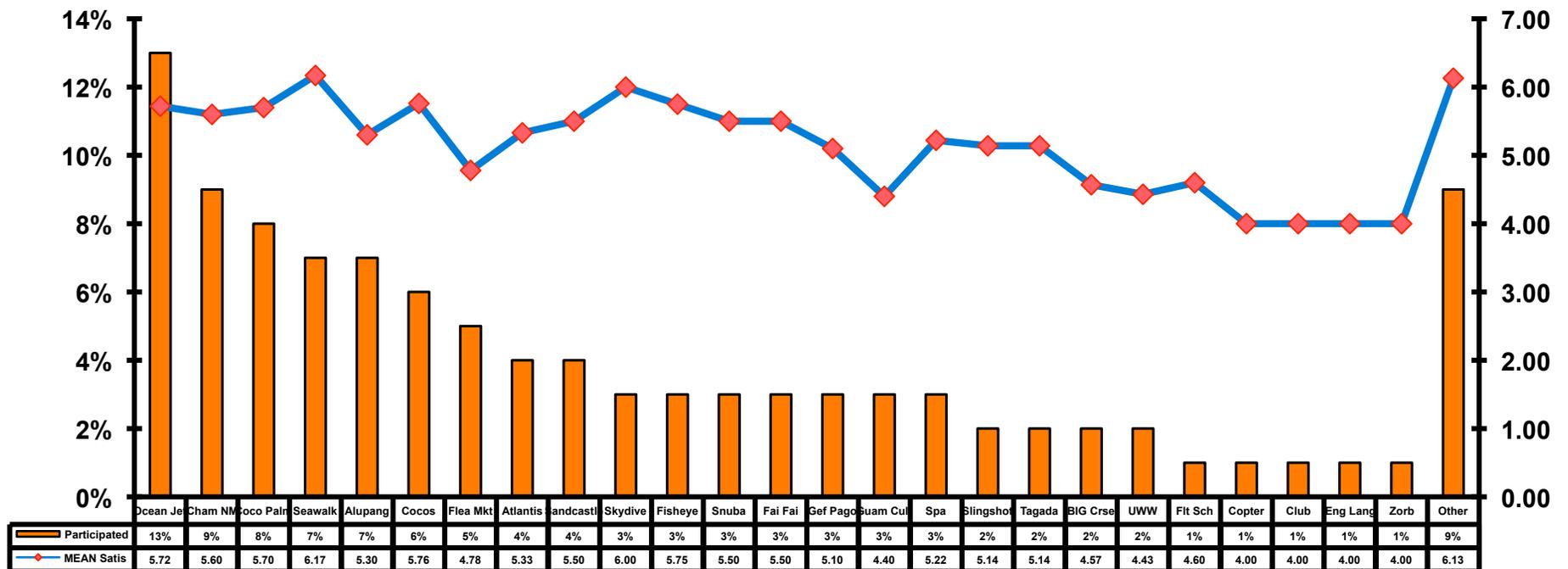
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 56%	Score of 6 to 7 = 54%
Score of 4 to 5 = 41%	Score of 4 to 5 = 39%
Score 1 to 3 = 3%	Score 1 to 3 = 7%
MEAN = 5.52	MEAN = 5.42

Optional Tour Participation

- Average number of tours participated in is 1.27



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 = 57%
Score of 4 to 5 = 39%	Score of 4 to 5 = 41%
Score 1 to 3 = 3%	Score 1 to 3 = 2%
MEAN = 5.50	MEAN = 5.45

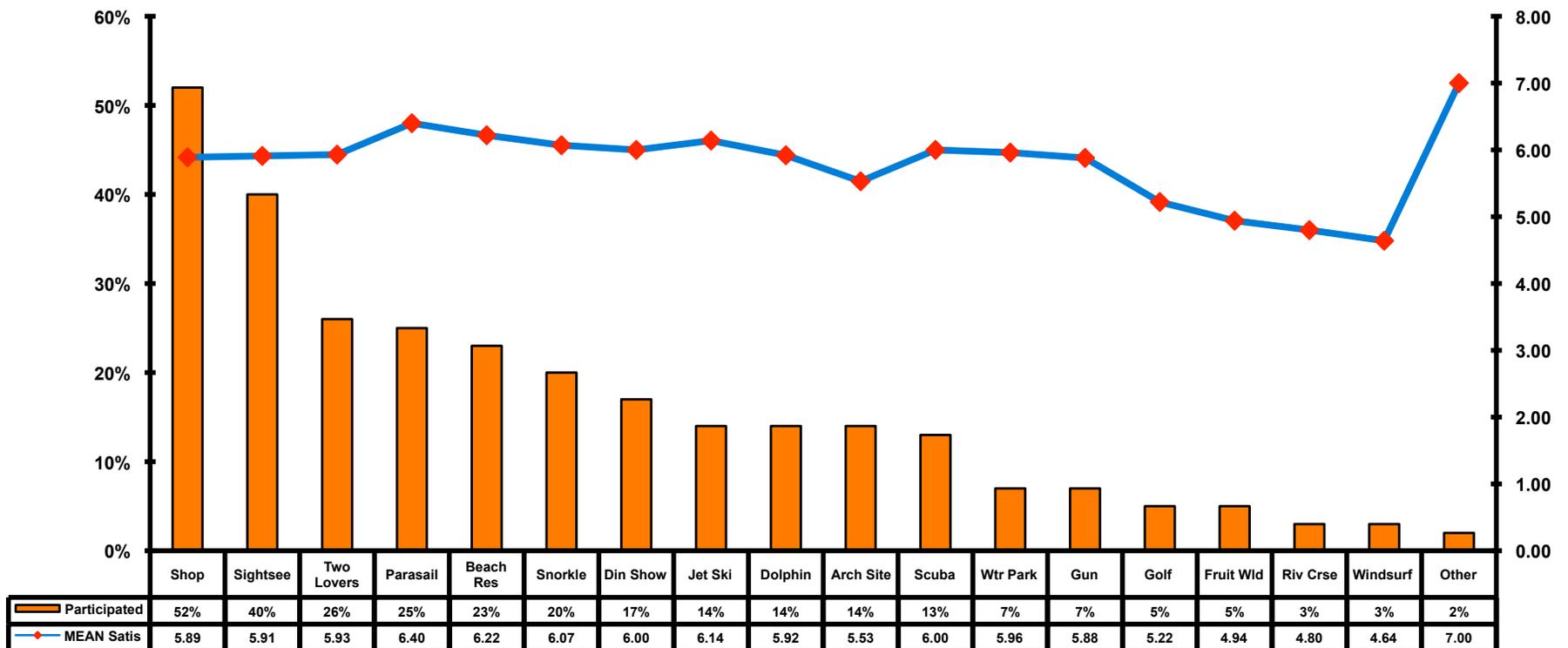
Night Tours Satisfaction

7pt Rating Scale

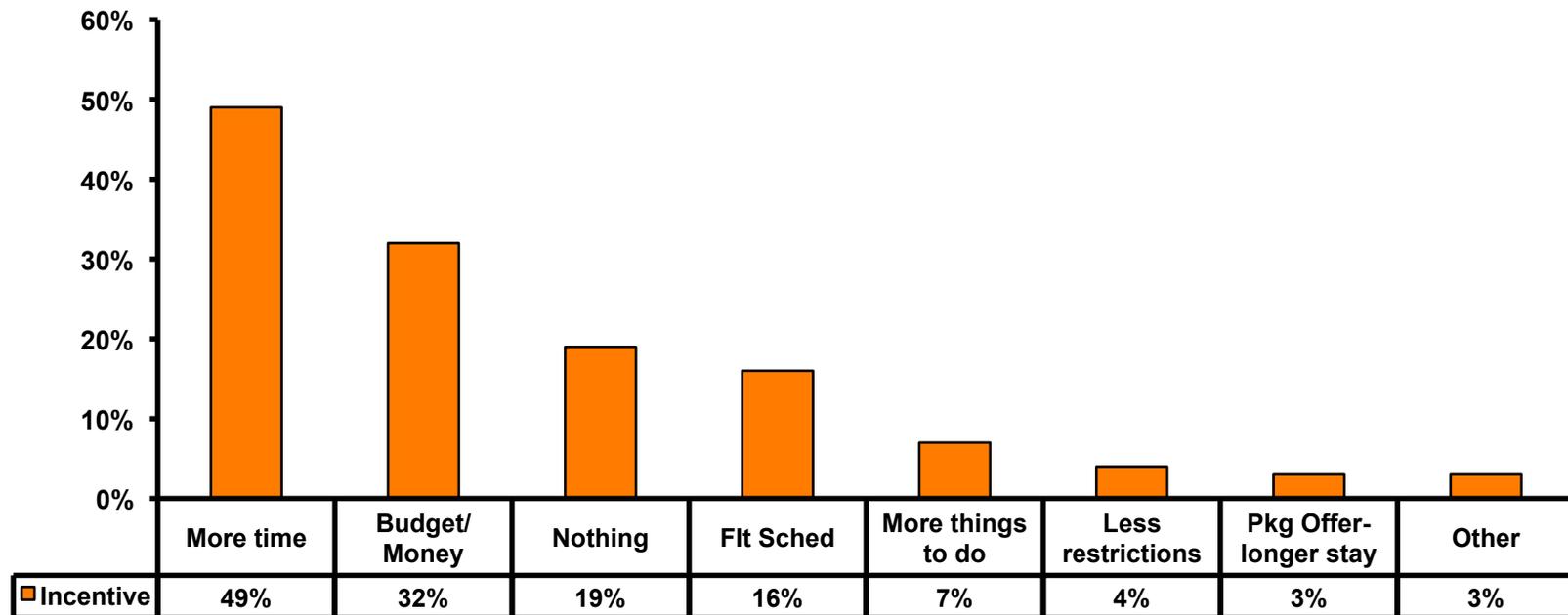
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 30%	Score of 6 to 7 = 27%
Score of 4 to 5 = 65%	Score of 4 to 5 = 67%
Score 1 to 3 = 5%	Score 1 to 3 = 5%
MEAN = 4.81	MEAN = 4.75

Satisfaction with Other Activities



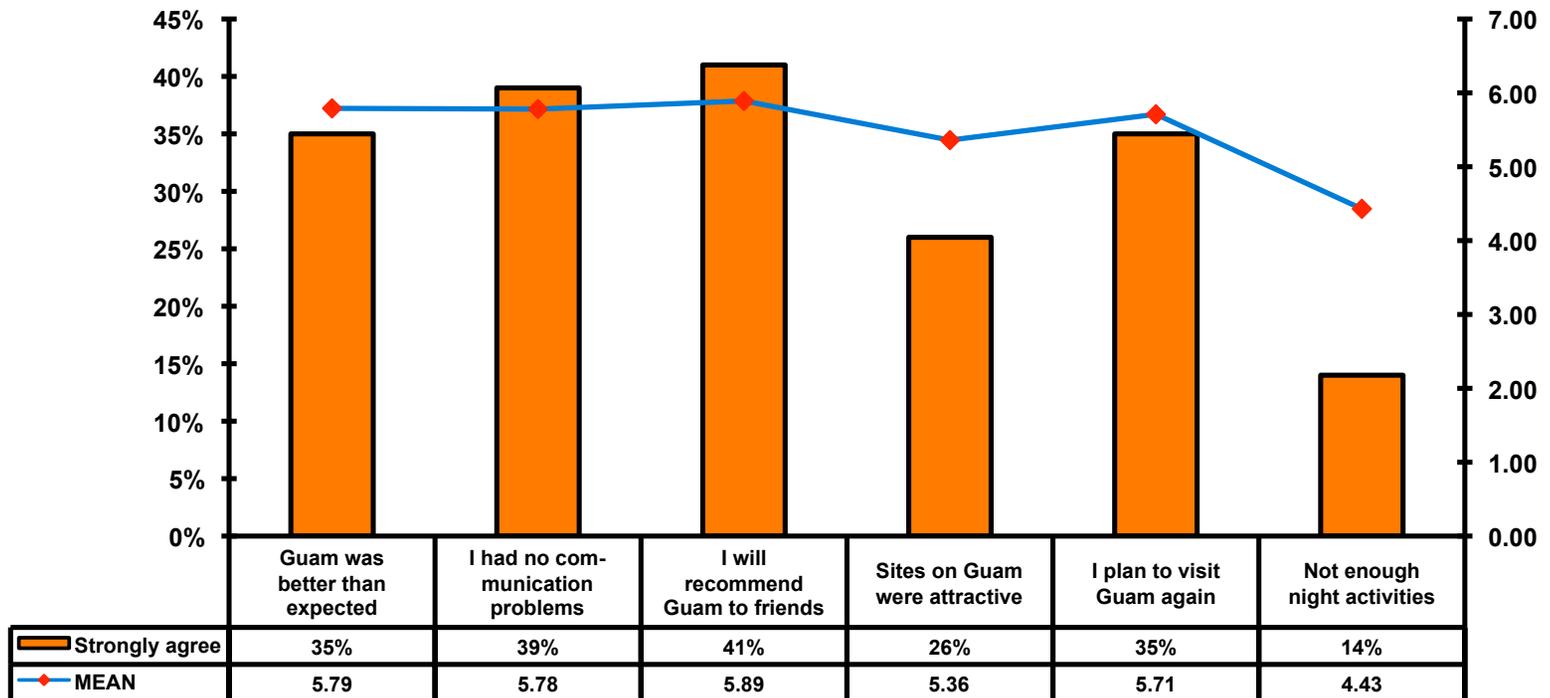
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

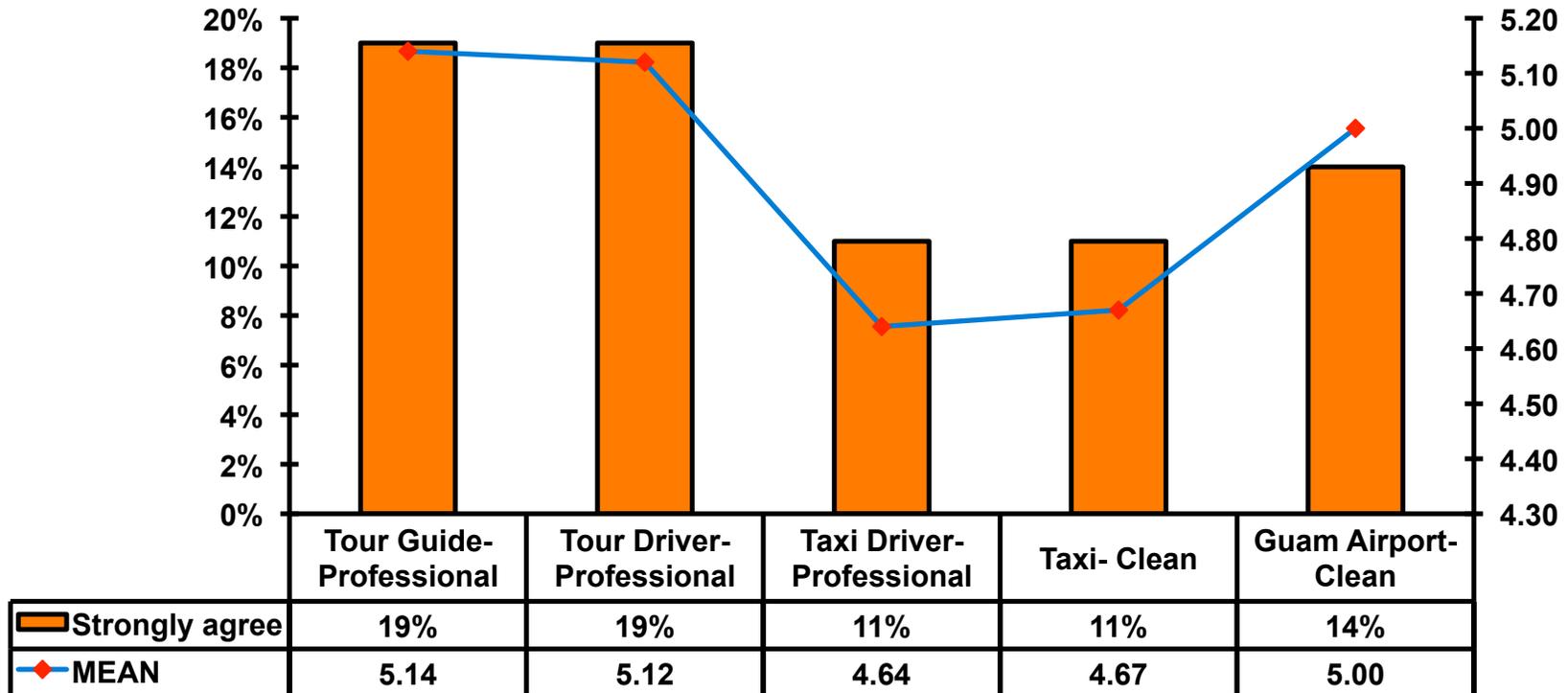
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

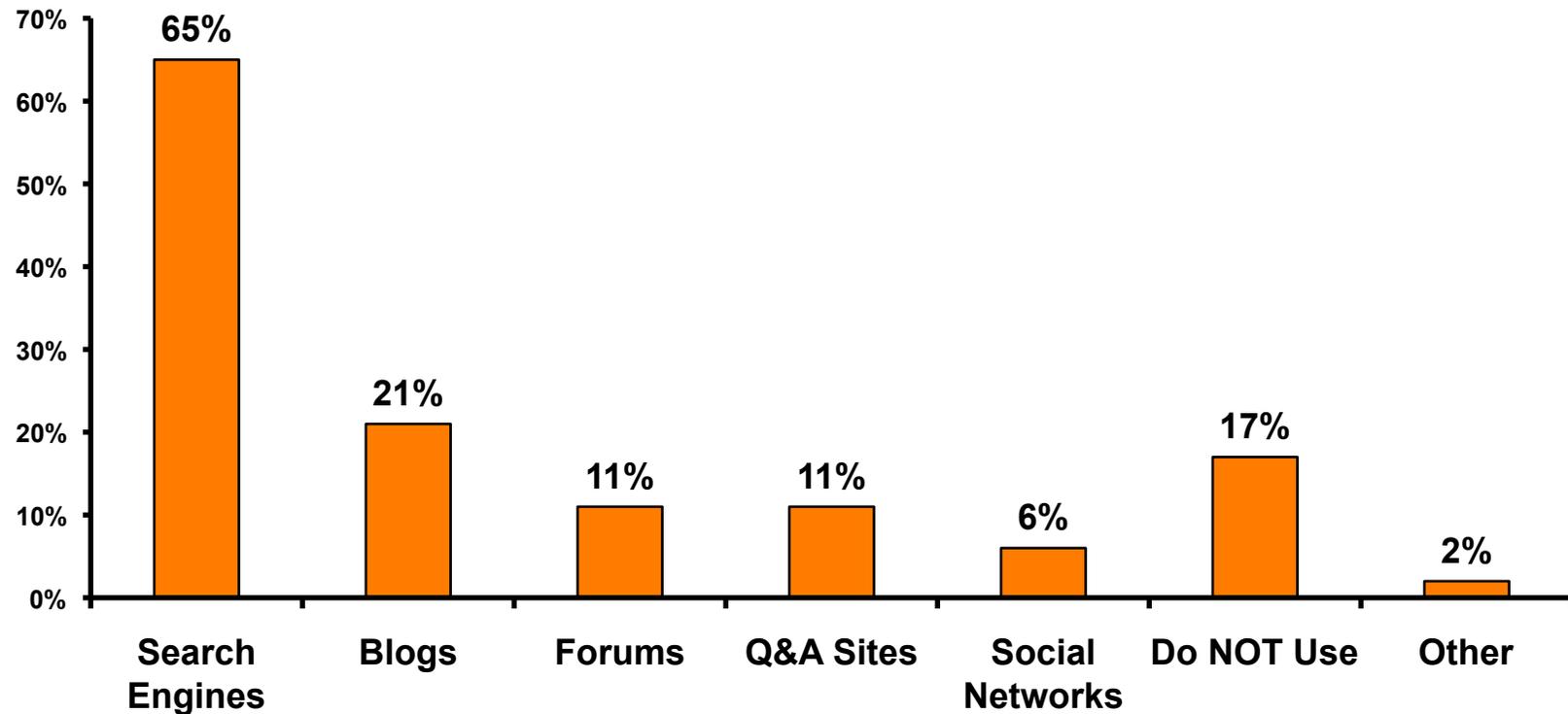
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



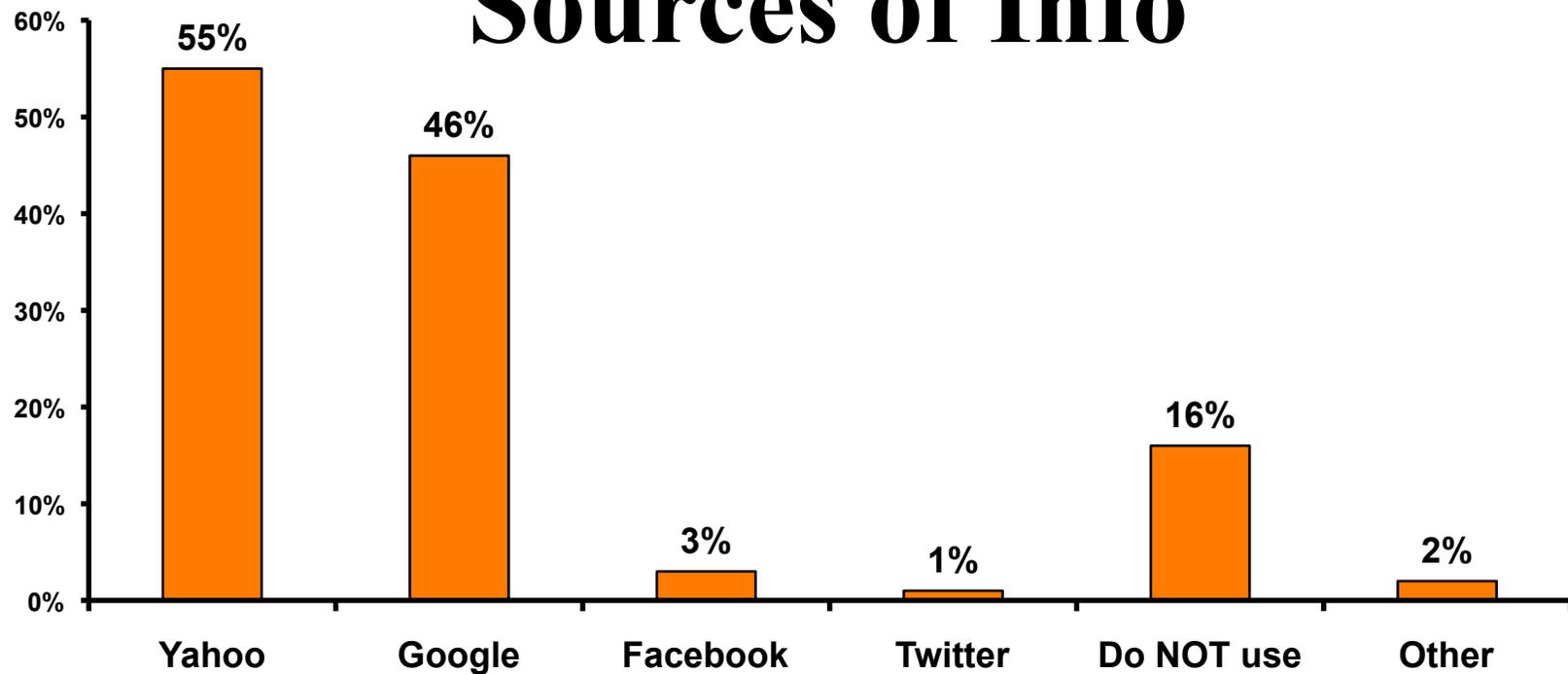
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

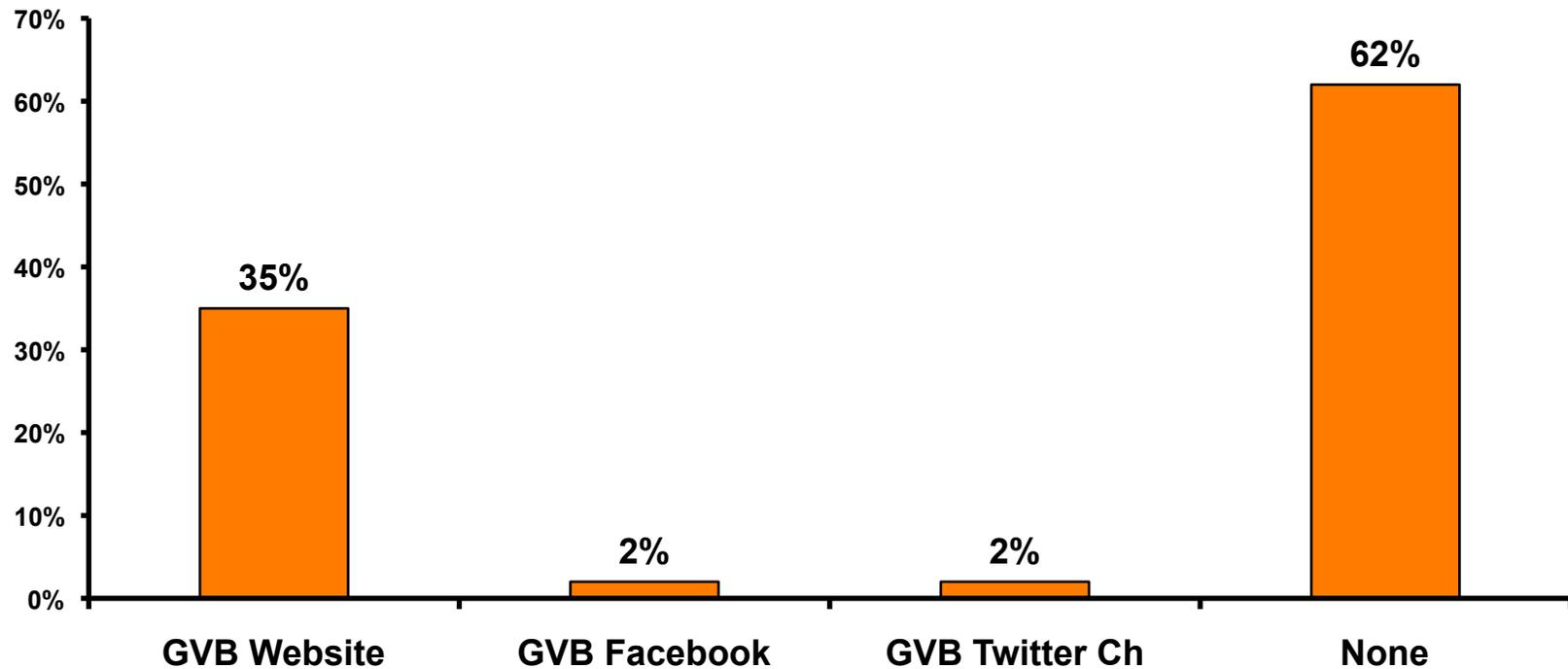


Internet- Things To Do

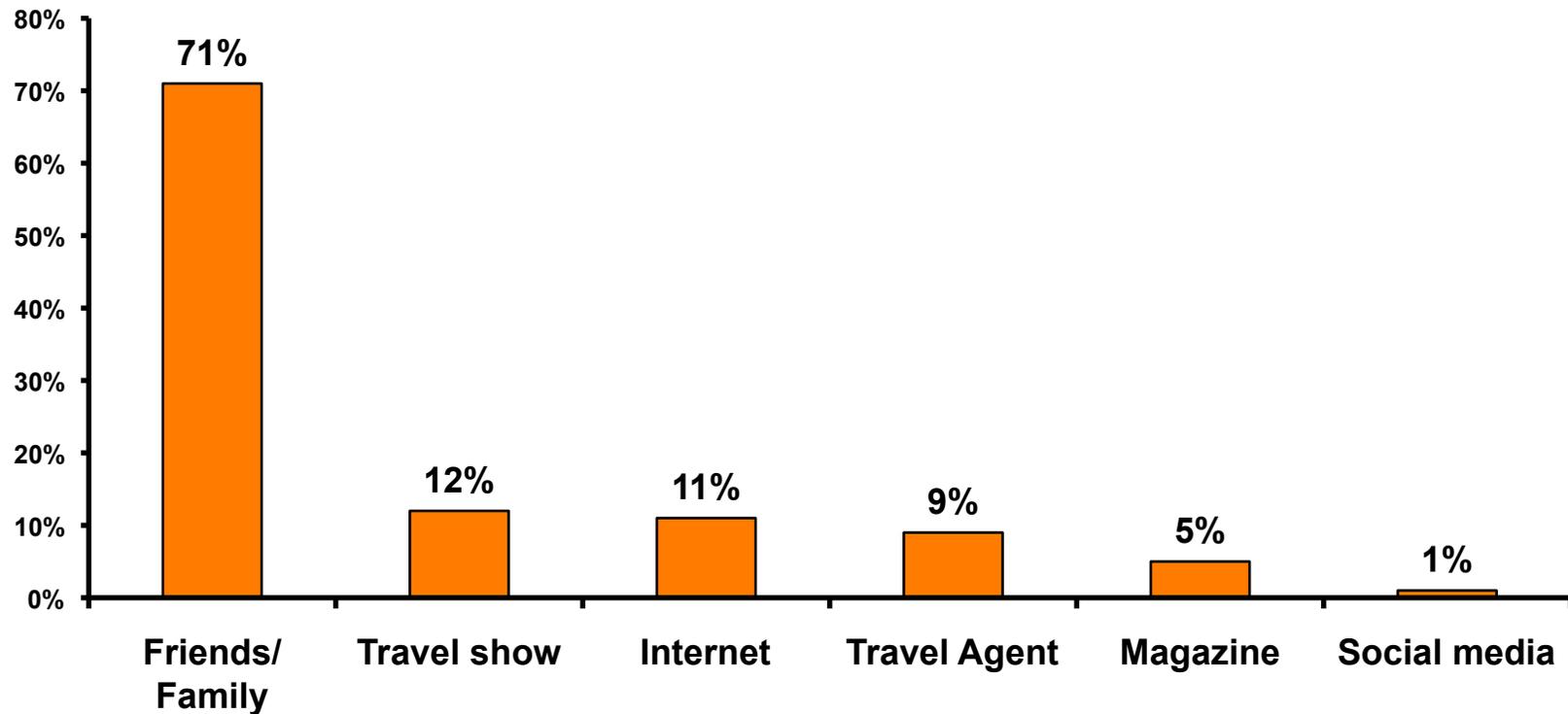
Sources of Info



Internet- GVB Sources

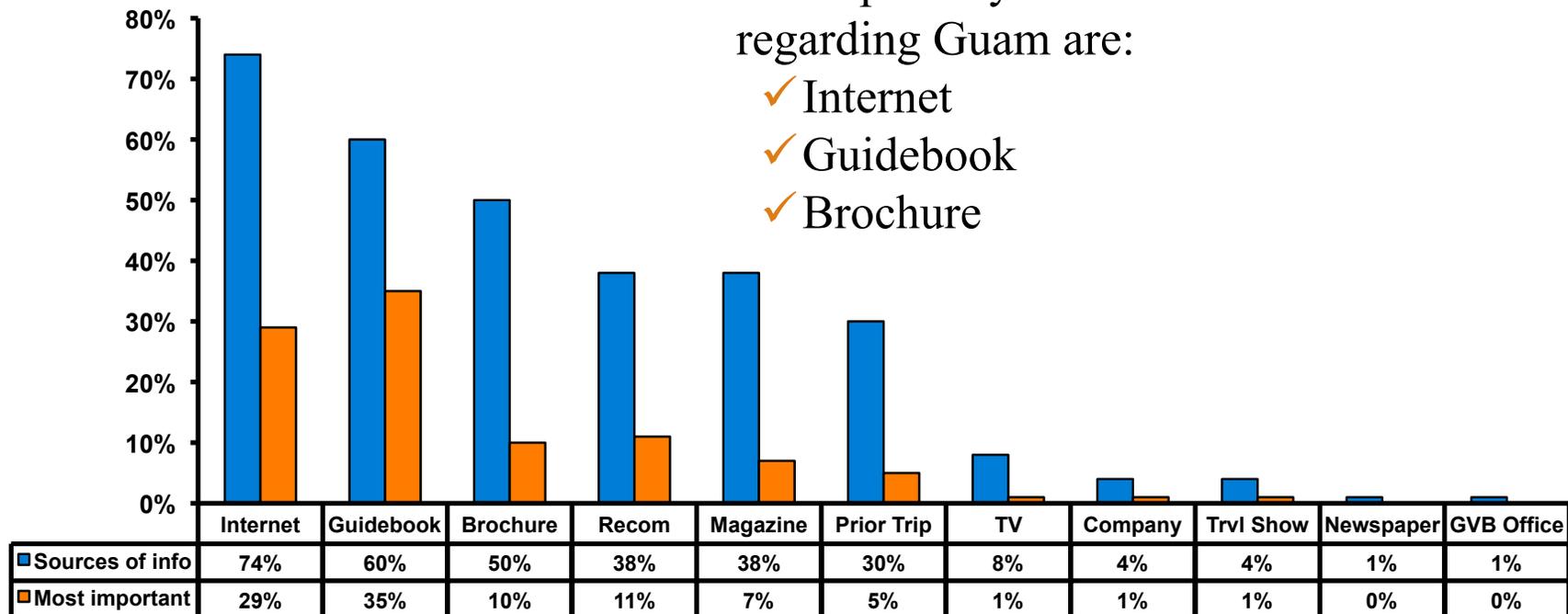


Travel Motivation- Info Sources



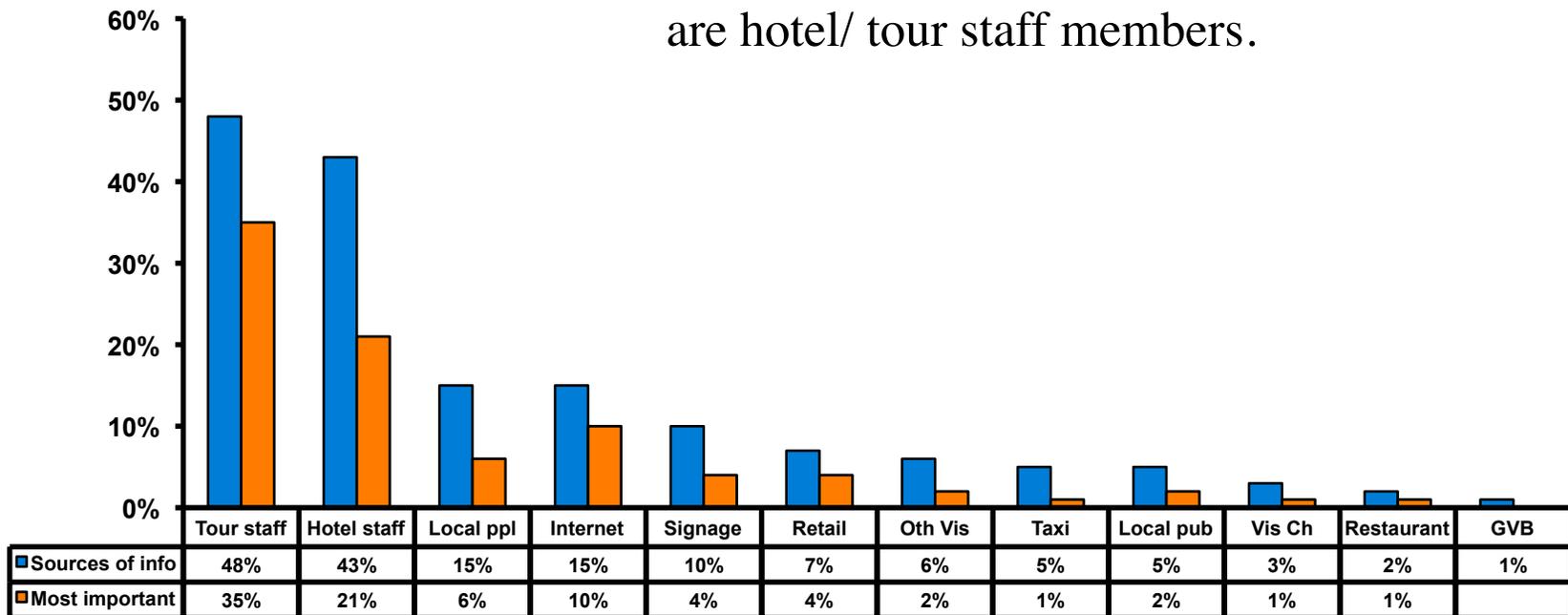
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

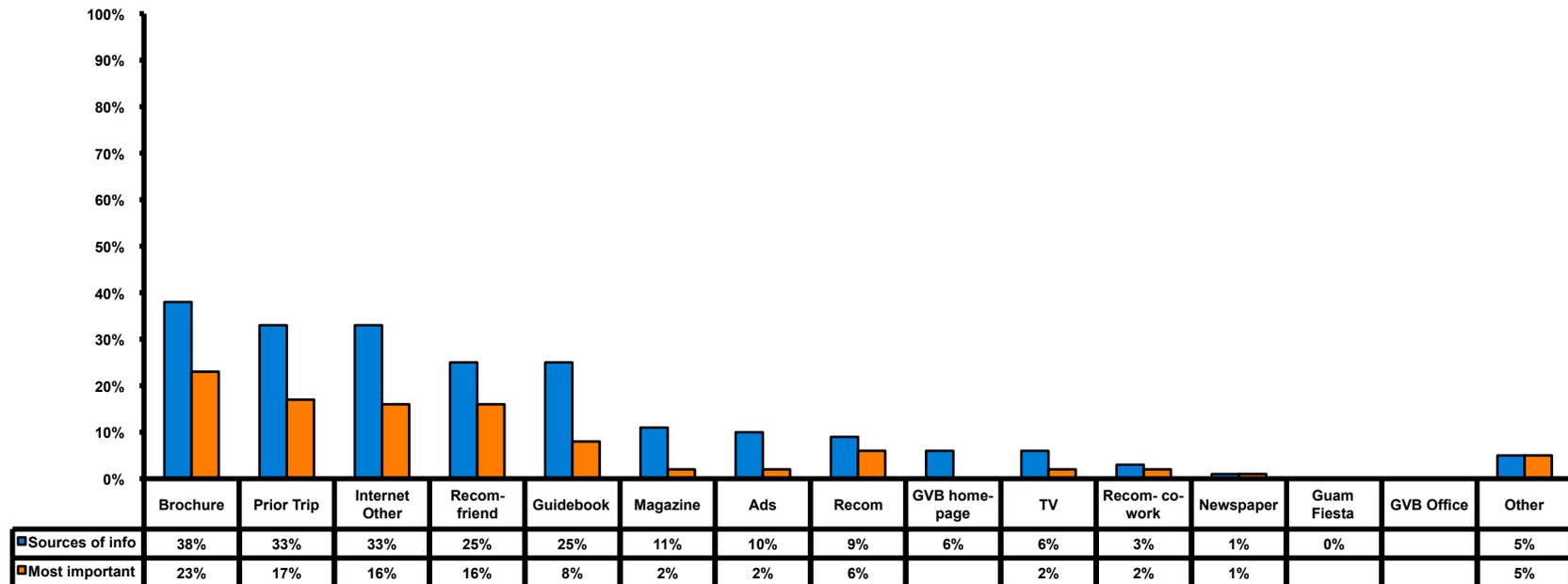
- The primary local source of information are hotel/ tour staff members.



Sources of Information - Motivation

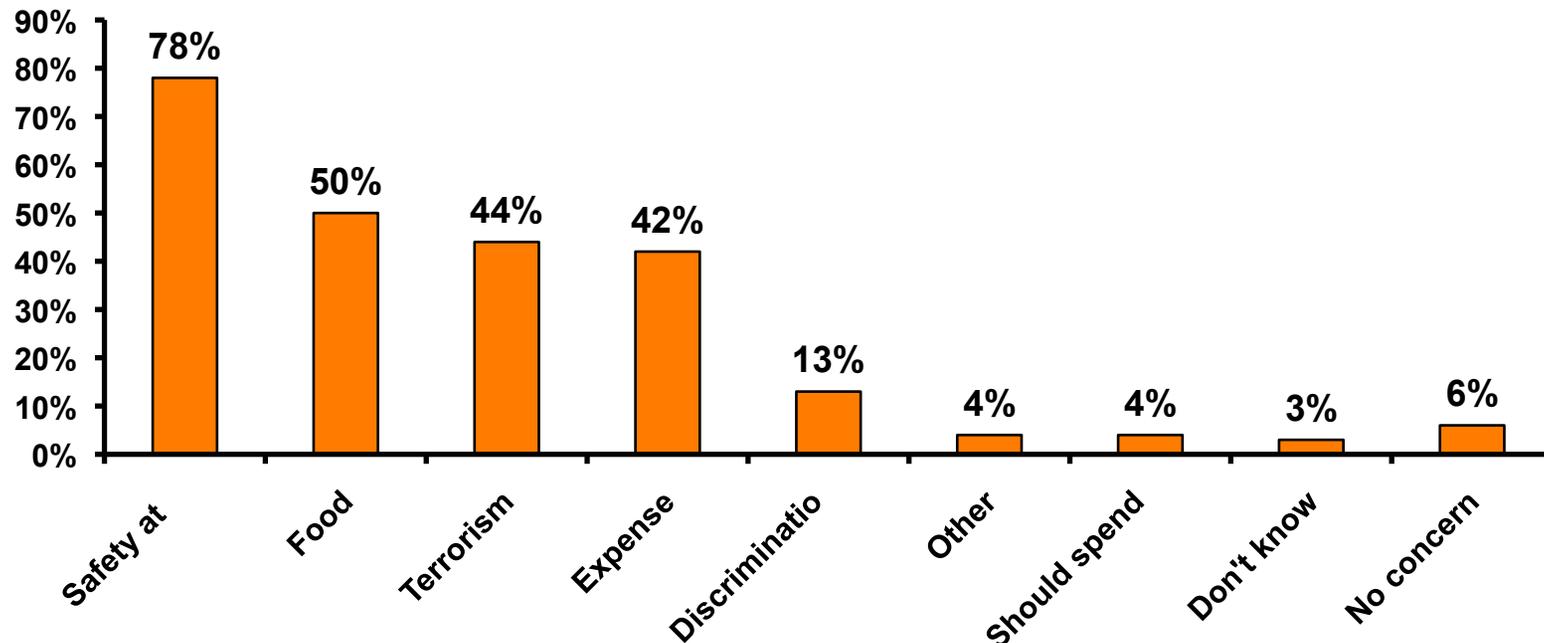
The primary motivational sources of information were.

- Brochures, the Internet and prior experience



SECTION 6 **OTHER ISSUES**

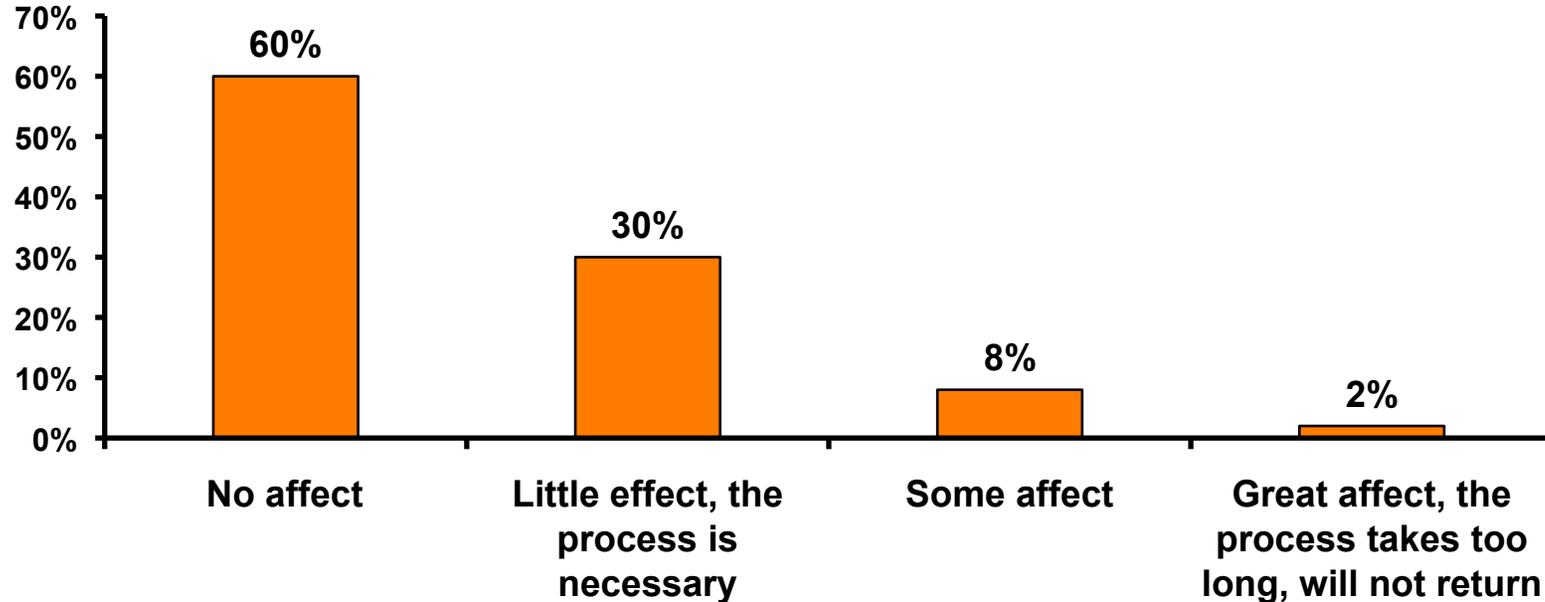
Concerns about travel outside of Japan - Overall



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	78%	75%	76%	87%	80%	82%	84%	79%	78%	78%	88%	63%	58%	
	Food	50%	47%	52%	52%	49%	65%	45%	54%	52%	57%	67%	34%	33%	
	Terrorism	44%	43%	44%	42%	51%	53%	48%	49%	41%	46%	39%	47%	42%	
	Expense	42%	44%	43%	45%	29%	59%	55%	44%	41%	44%	47%	21%	75%	
	Discrimination against Japanese	13%	10%	14%	18%	7%	12%	16%	21%	15%	10%	12%	13%	25%	
	No concerns	6%	5%	7%	3%	5%		6%	8%	4%	6%	4%	8%	17%	
	Should spend at home	4%	2%	3%	7%	10%	6%	3%	8%	7%	6%	2%	3%		
	Other	4%	5%	3%	3%	5%	6%	3%	5%	2%	3%	2%	3%		
	Don't know	3%	1%	3%	3%	7%			3%	2%		2%	5%		
	Total	Count	351	102	147	60	41	17	31	39	46	68	51	38	12

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

