



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013

FEBUARY 2013



Prepared by: QMark Research

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Background & Methodology

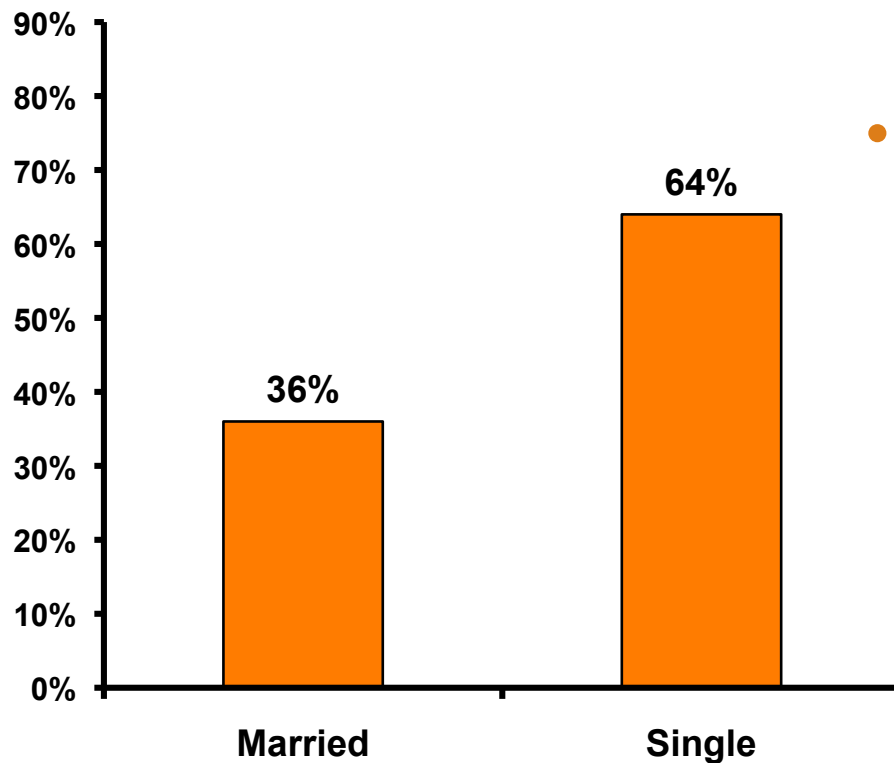
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing 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.

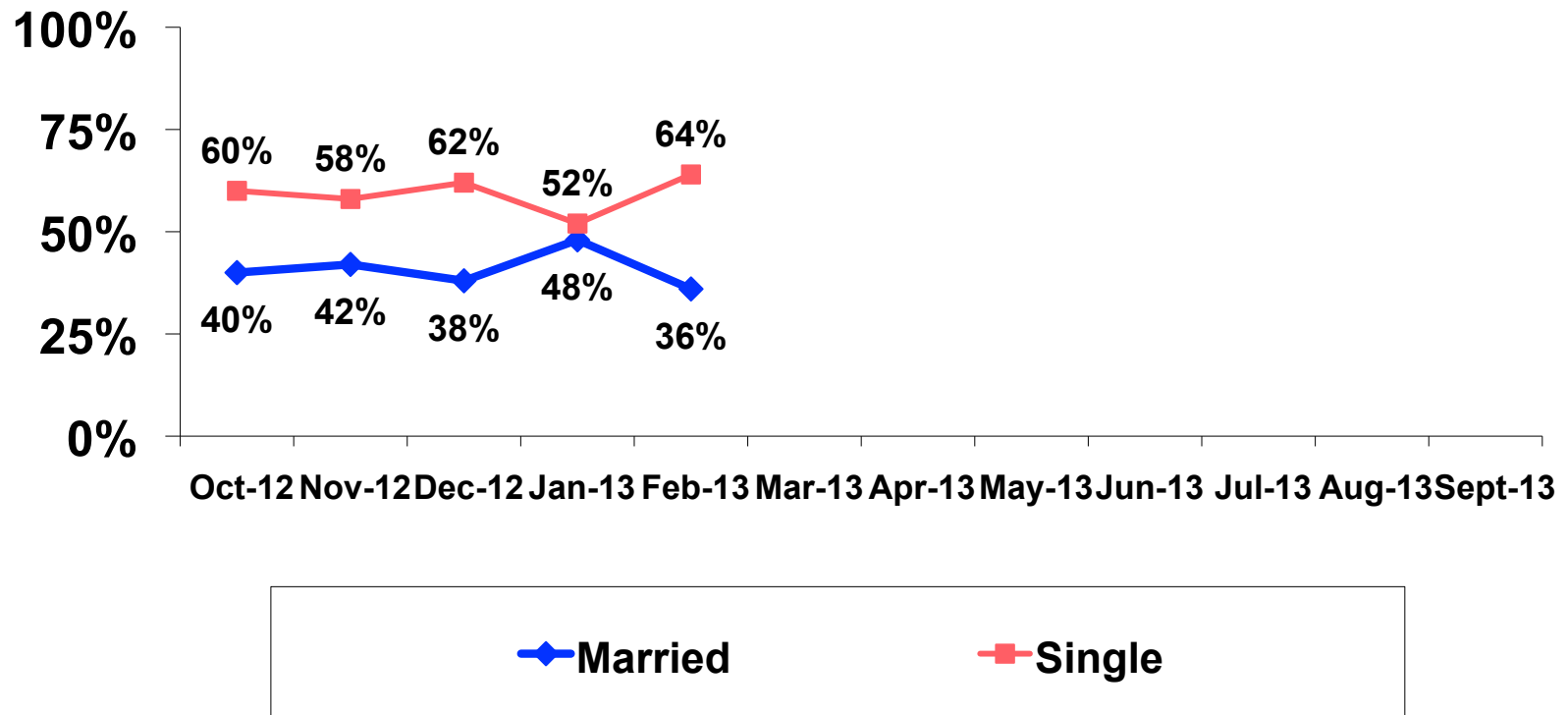
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

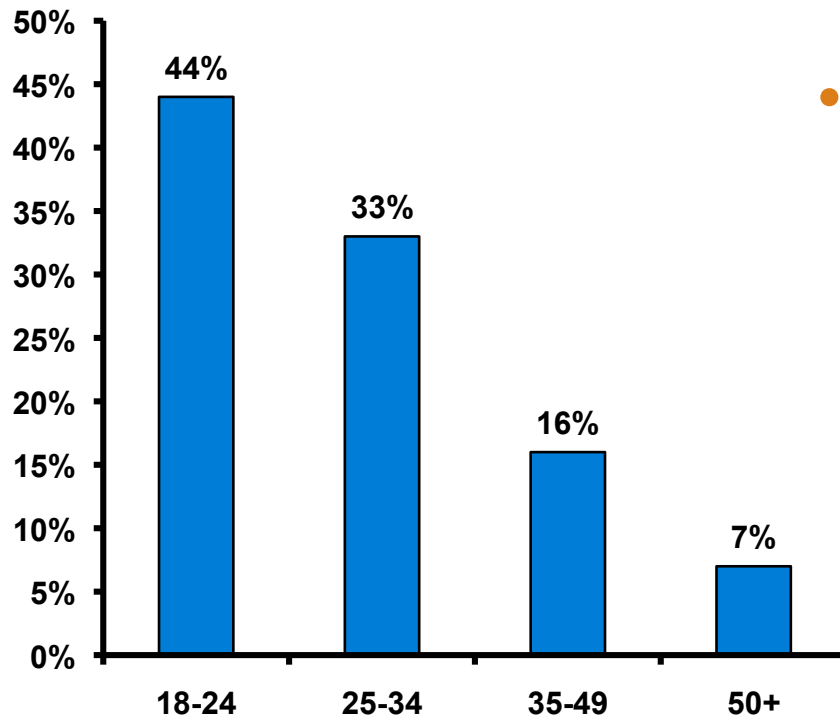


- 73% of first-time visitors are single.

Marital Status

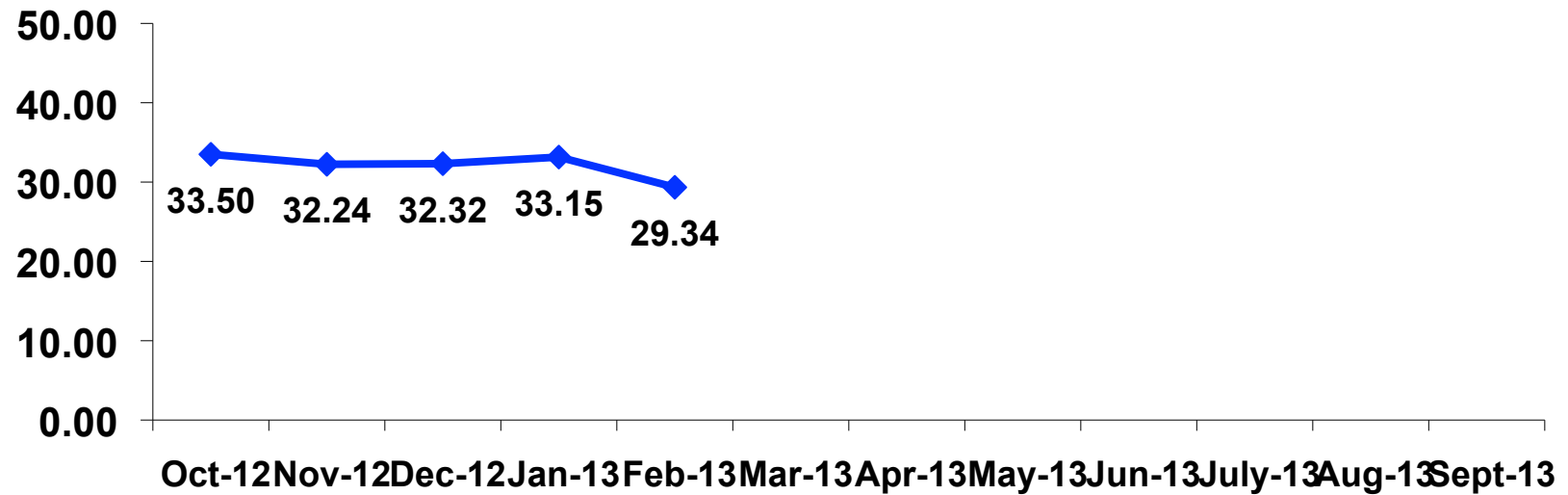


Age - Overall

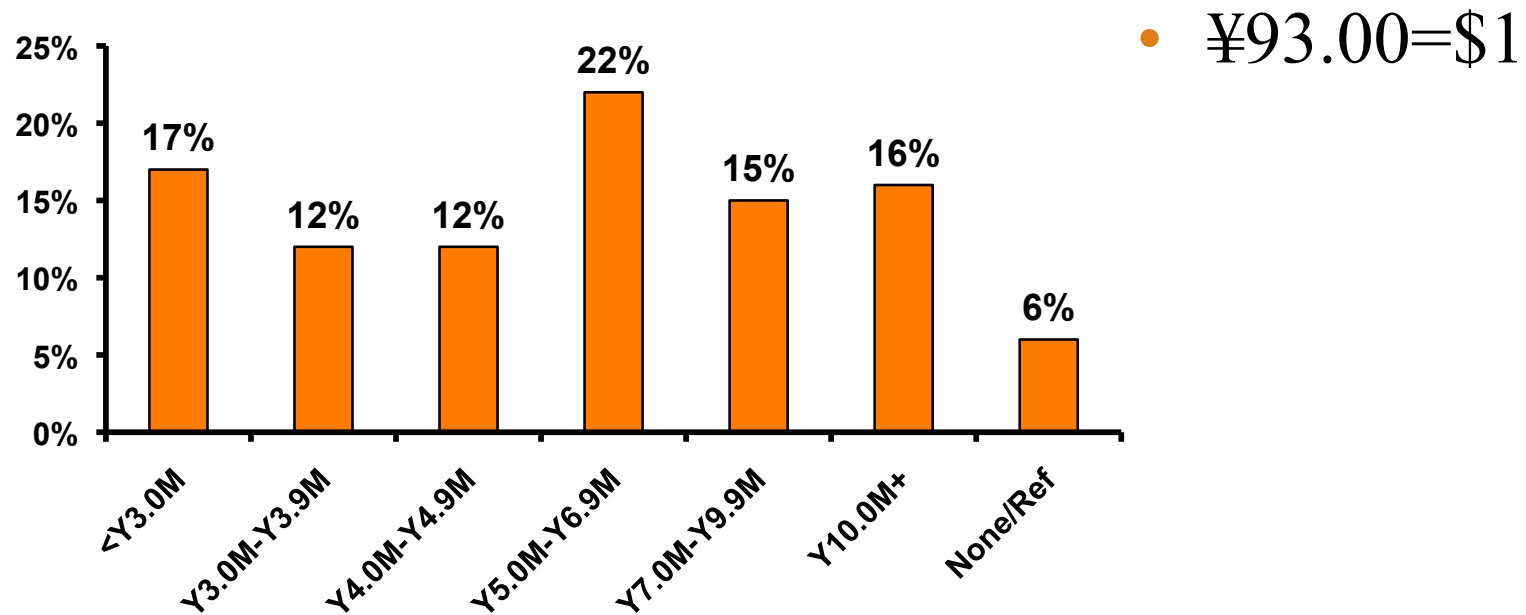


- The average age of the respondents is 29.34 years of age.

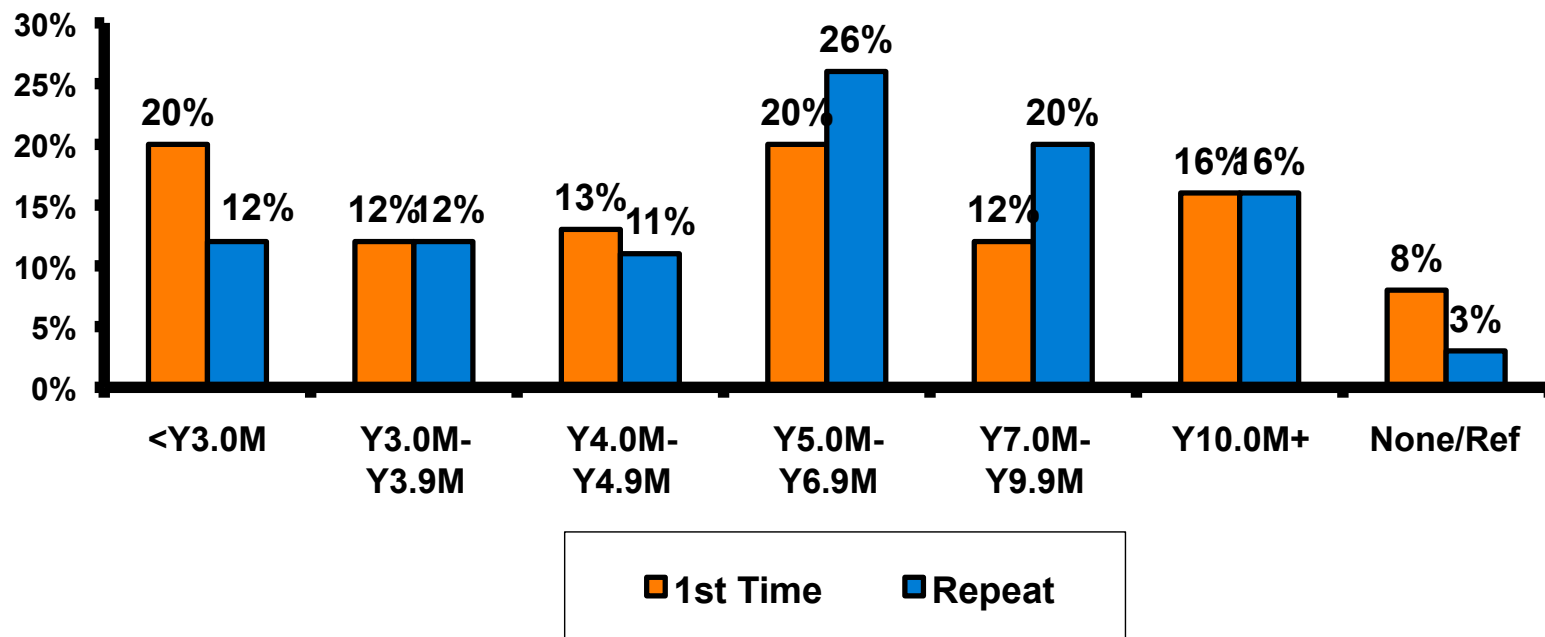
Average Age



Personal Income



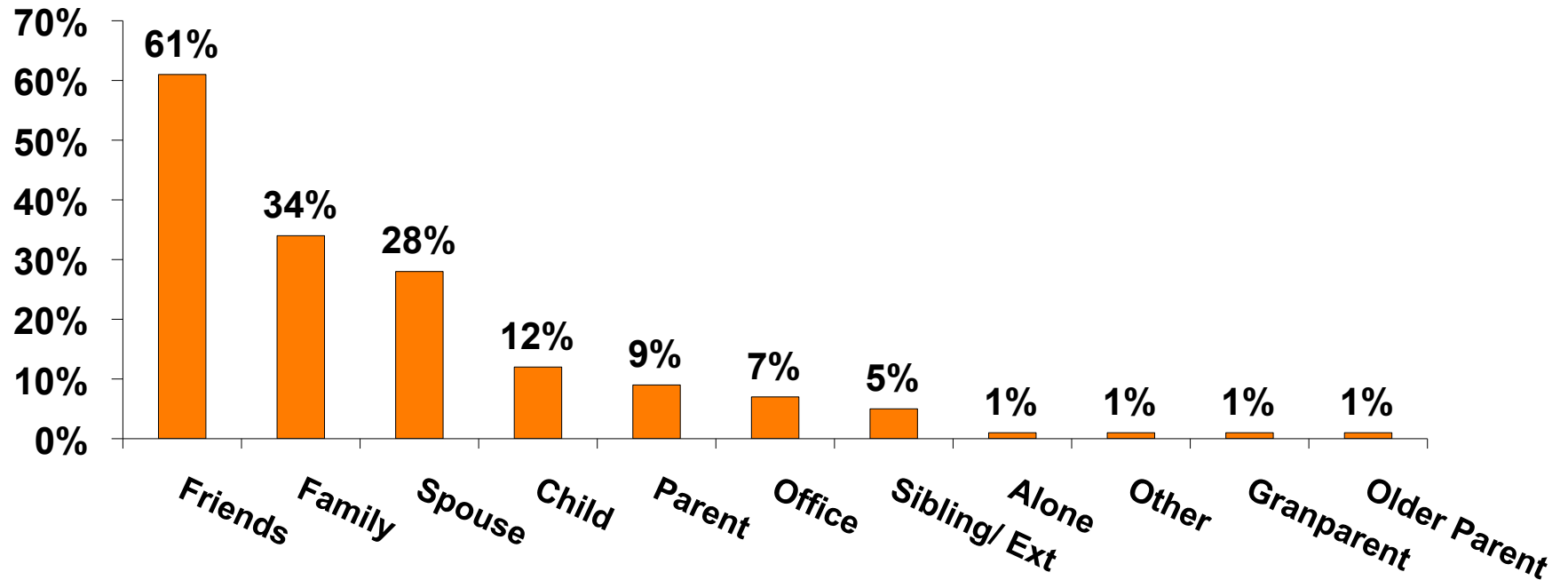
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	21	8	13	14	5	1	1
		Column N %	7%	5%	9%	12%	4%	2%	5%
	Y2.0M-Y3.0M	Count	31	11	20	14	12	2	2
		Column N %	10%	7%	14%	12%	11%	4%	10%
	Y3.0M-Y4.0M	Count	37	16	21	10	25	2	
		Column N %	12%	10%	14%	8%	22%	4%	
	Y4.0M-Y5.0M	Count	37	21	16	9	21	2	5
		Column N %	12%	13%	11%	8%	19%	4%	24%
	Y5.0M-Y7.0M	Count	68	40	28	21	23	20	4
		Column N %	22%	25%	19%	18%	21%	37%	19%
	Y7.0M-Y10.0M	Count	45	26	19	13	11	16	5
		Column N %	15%	16%	13%	11%	10%	30%	24%
	Y10.0M+	Count	49	30	19	20	14	10	4
		Column N %	16%	19%	13%	17%	13%	19%	19%
	No Income	Count	19	7	12	17	1	1	
		Column N %	6%	4%	8%	14%	1%	2%	
	Total	Count	307	159	148	118	112	54	21

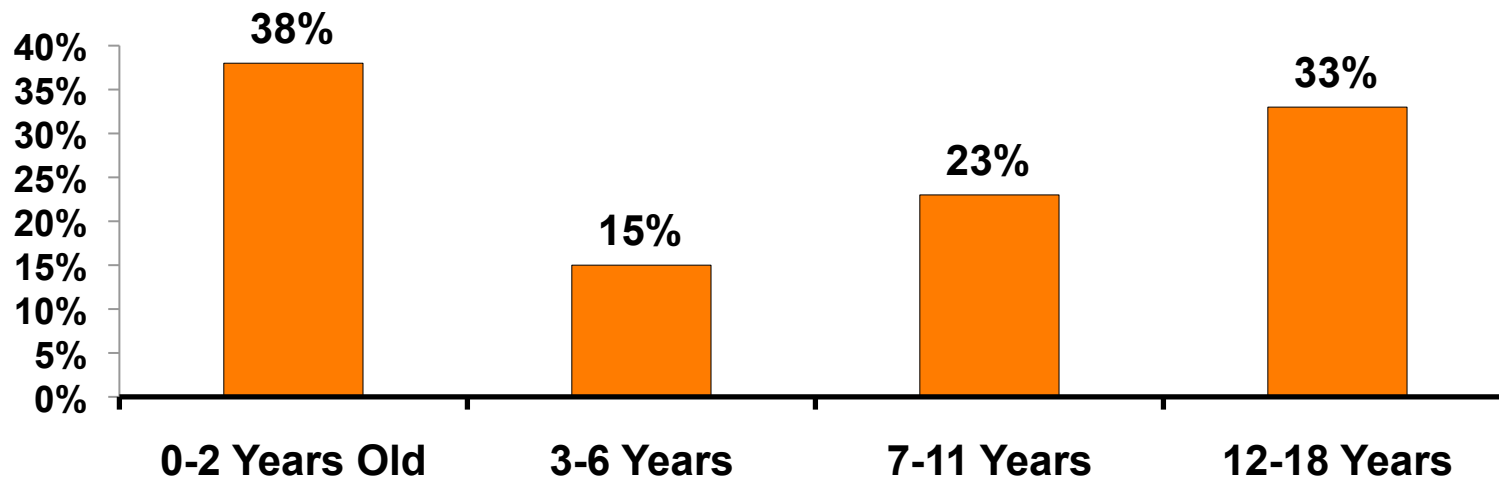
Travel Companions



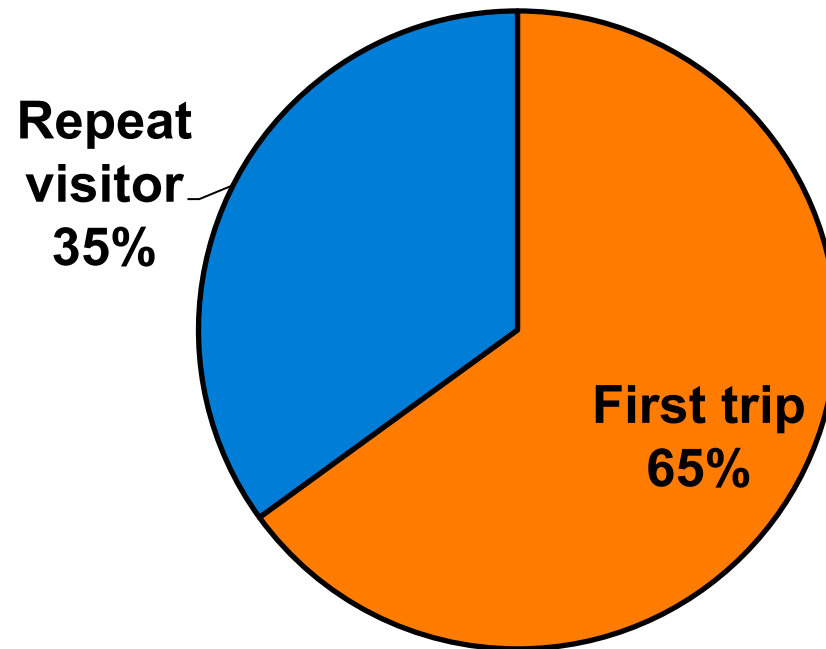
Number of Children Travel Party

N=43 total respondents traveling with children.

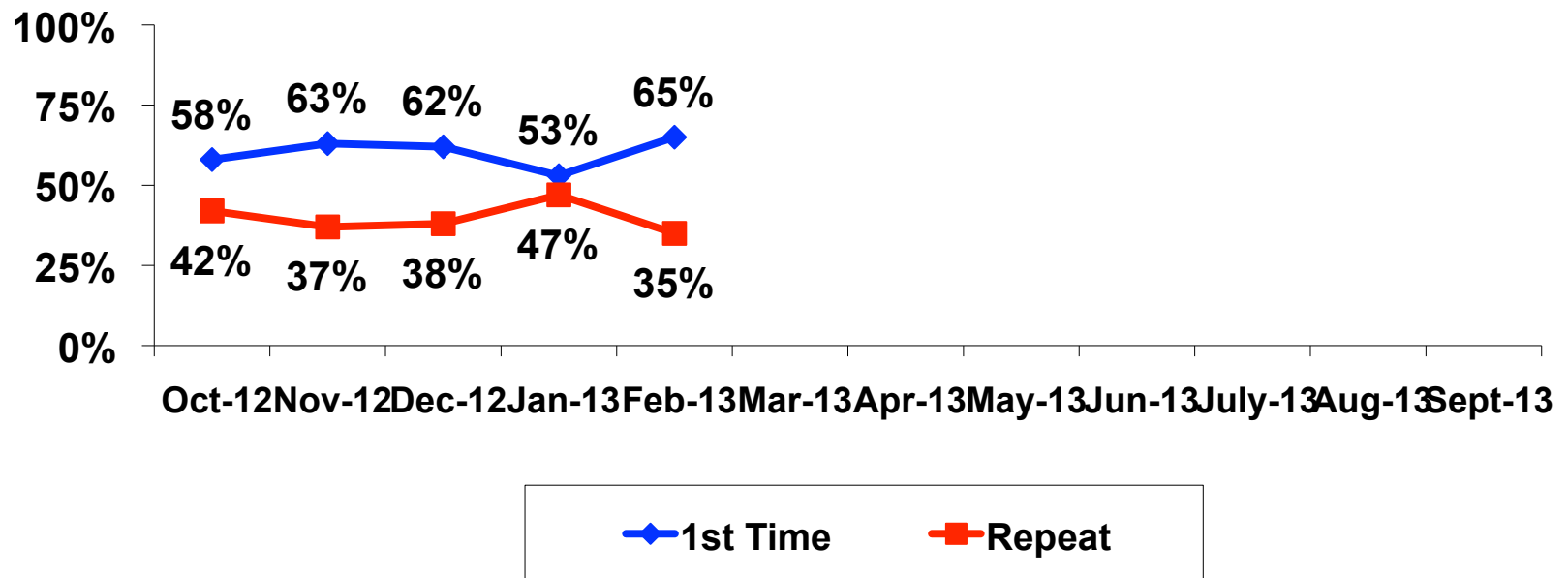
(Of those N=43 respondents, there is a total of 53 children 18 years or younger)



Prior Trips to Guam



Prior Trips To Guam



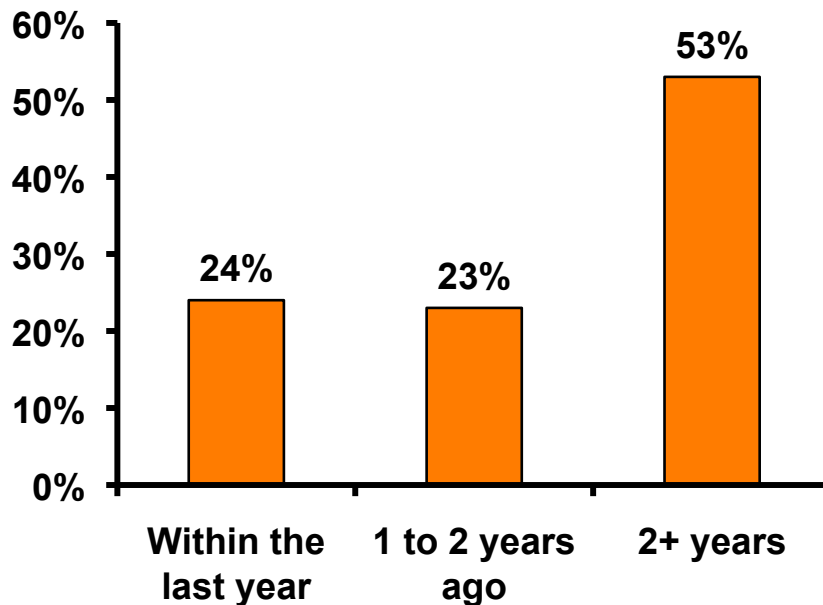
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	175	106	69	
		Column N %	50%	47%	56%	
	Female	Count	177	121	55	
		Column N %	50%	53%	44%	
	Total	Count	352	227	124	
AGE	18-24	Count	155	125	29	
		Column N %	44%	55%	24%	
	25-34	Count	117	69	48	
		Column N %	33%	30%	39%	
	35-49	Count	55	24	31	
		Column N %	16%	11%	25%	
	50+	Count	23	9	14	
		Column N %	7%	4%	11%	
		Total	Count	350	227	122

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

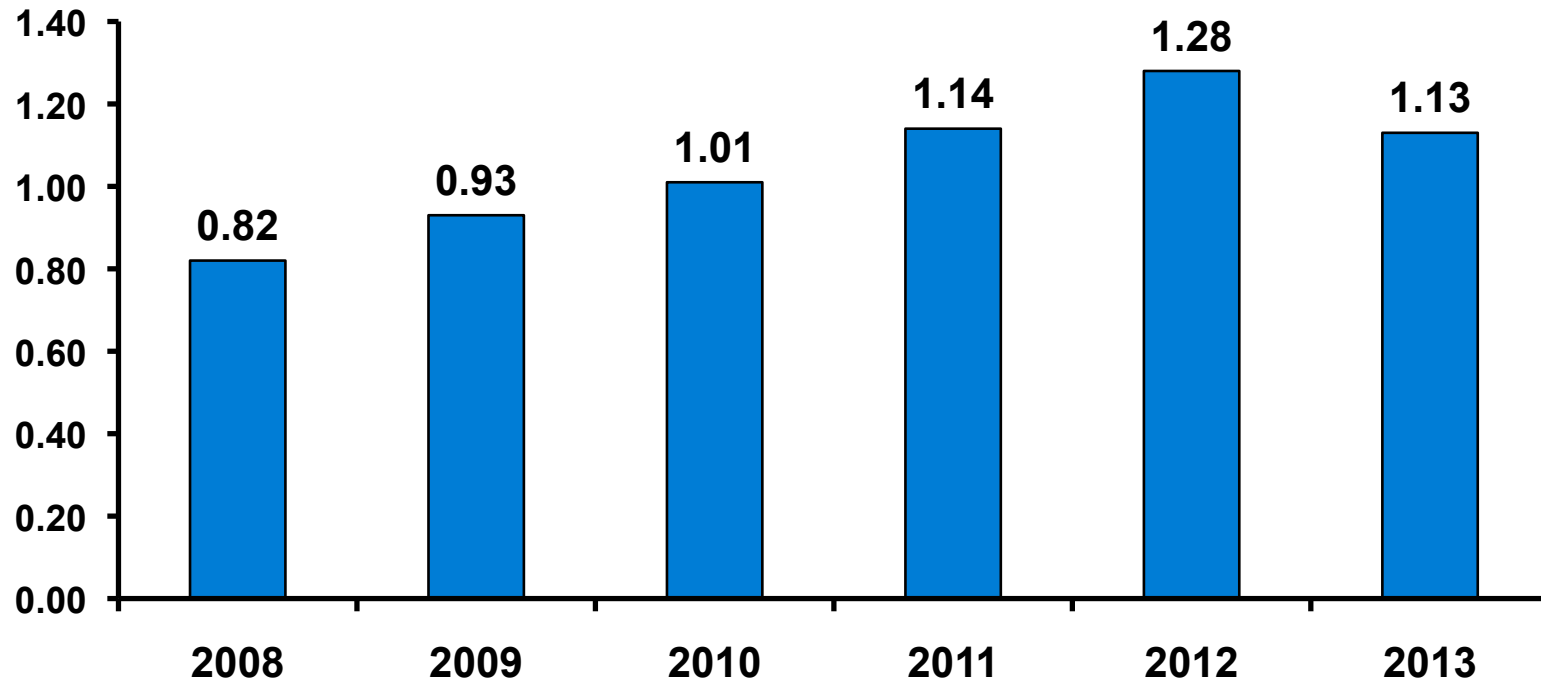
Repeat Visitors Last Trip

n = 120



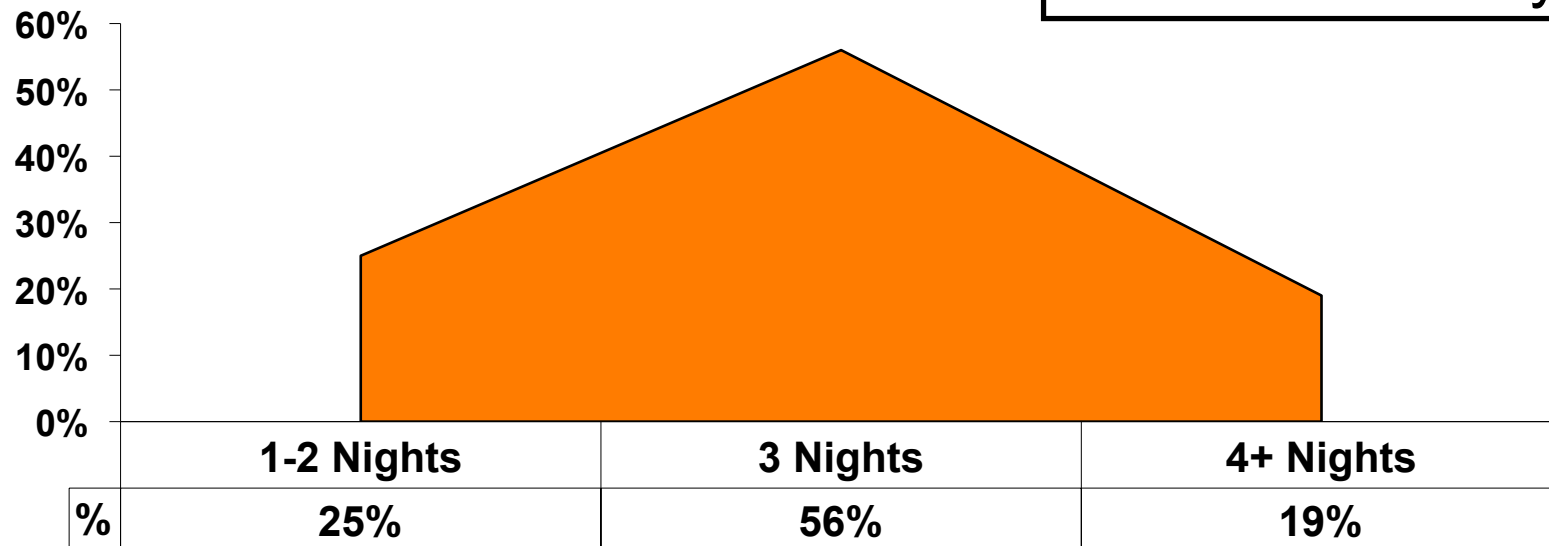
- The average repeat visitor has been to Guam 3.21 times.
- Half the repeat visitors have been to Guam within the last 2 years.

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

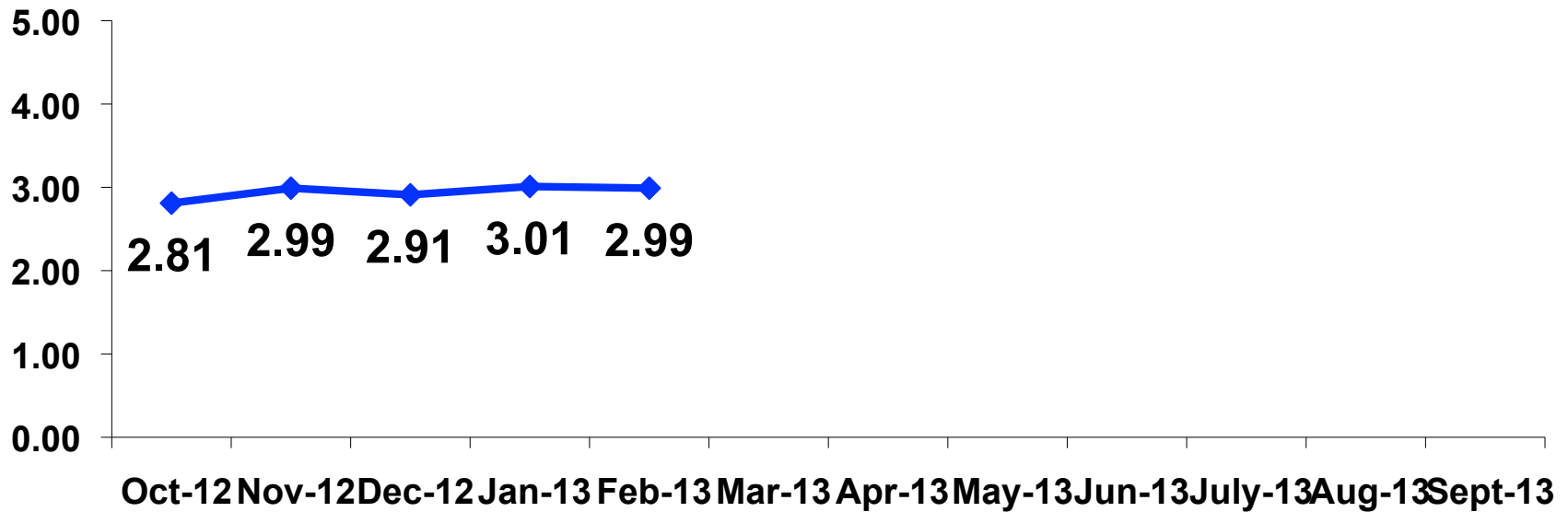


Length of Stay

Mean = 2.99 Days
Median = 3.0 Days



Average Length of Stay

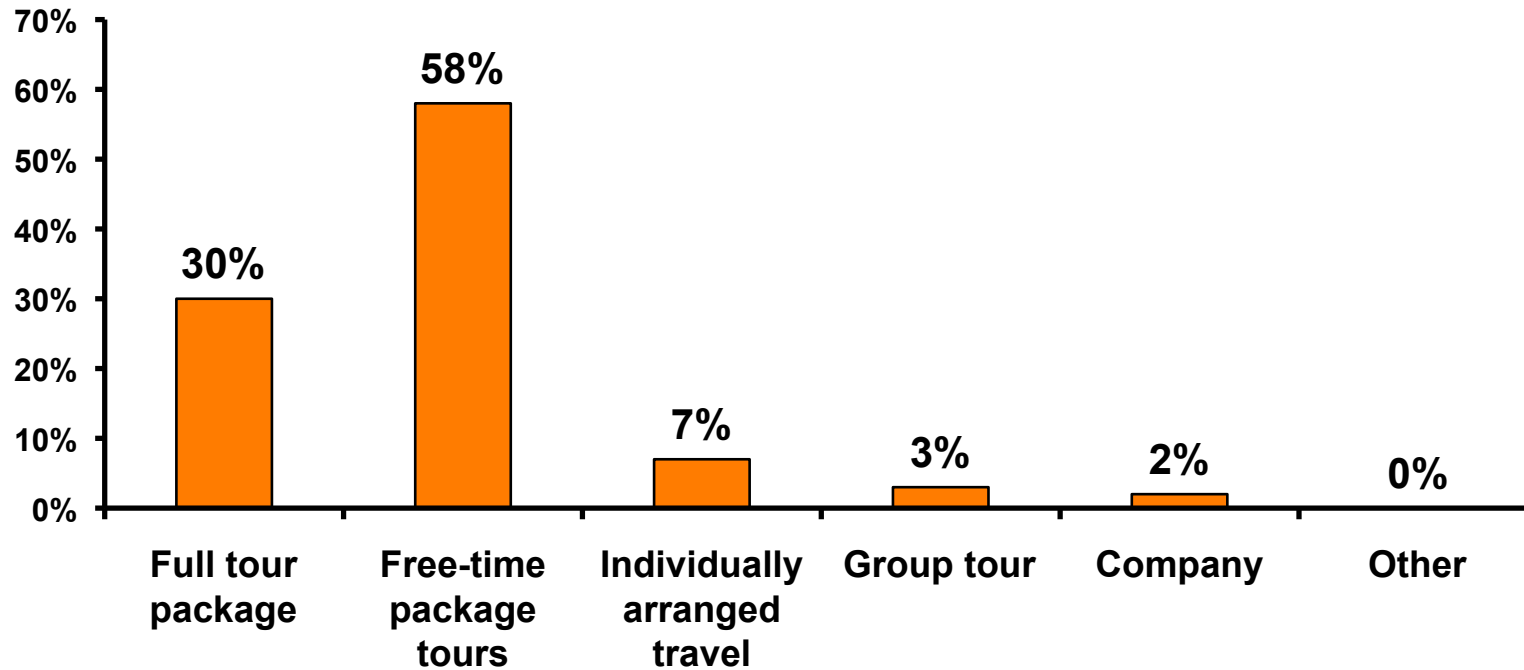


Occupation by Income

		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	Student	37%	62%	37%	16%	16%	25%	24%	31%	84%	
	Office worker non-mgr	16%		23%	27%	11%	25%	20%	18%		
	Engineer	12%	5%	10%	19%	19%	15%	18%	12%		
	Salesperson	10%	10%	7%	14%	19%	15%	4%	8%		
	Professional/ Specialist	4%	5%	7%	5%	8%	3%	4%	2%		
	Manager	4%				3%	4%	9%	6%		
	Skilled worker	3%		10%	11%	8%	1%		2%		
	Self-employed	3%	10%			3%	4%	7%	6%		
	Homemaker	3%				3%	4%	7%	2%		
	Unemployed	1%	10%			3%		2%		5%	
	Freeter	1%			3%		1%			11%	
	Govt- Manager	1%				3%	1%	2%	4%		
	Teacher	1%			3%	3%			2%		
	Other	1%		3%				2%			
	Govt- office worker non-mgr	1%			3%	3%					
	Executive (30+ employees)	1%							2%		
	Retired	0%		3%							
	Free-lancer	0%							2%		
	Govt- Executive	0%							2%		
	Total	Count	349	21	30	37	37	68	45	49	19

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

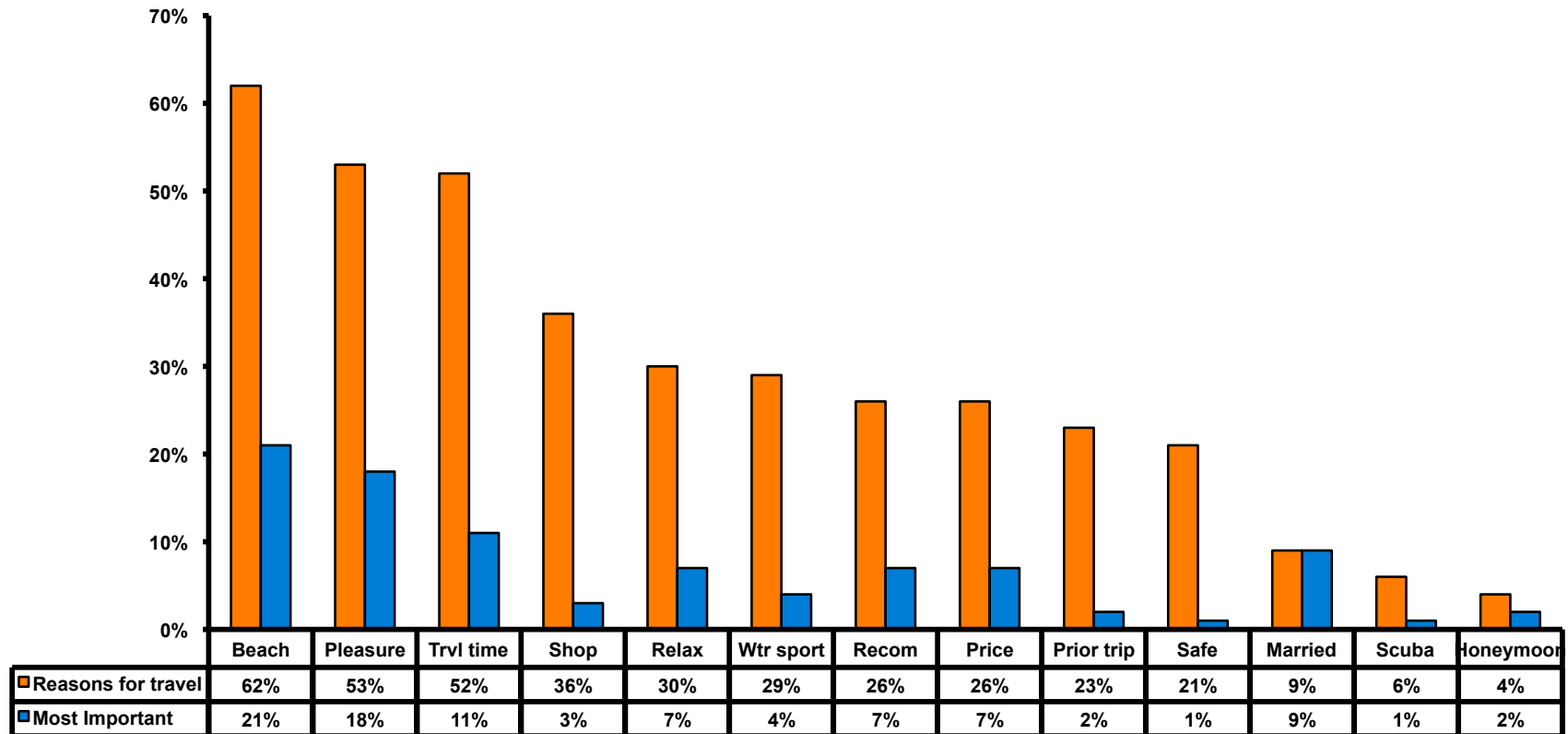


Accommodation by Income

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	12%	14%	10%	8%	16%	9%	16%	16%	5%	
Fiesta Resort Guam	9%	19%	3%	8%	8%	12%	7%	4%	21%	
Hilton Guam Resort	9%		10%	8%	11%	12%	11%	6%		
Guam Reef Hotel	7%	5%	16%	3%	3%	6%	7%	10%	16%	
Westin Resort Guam	7%	5%	10%	5%	11%	6%	11%	6%	5%	
Outrigger Guam Resort	6%		10%	8%		7%	13%	10%		
Bayview Hotel	6%	5%	3%	3%	3%	6%	2%	6%	21%	
PIC Club	6%	5%	3%	8%	5%	12%	2%	6%		
Hotel Nikko Guam	5%	10%		5%	8%	4%	9%	4%		
Grand Plaza Hotel	4%	5%	6%	8%	5%		2%	2%		
Onward Beach Resort	4%		3%	3%		4%	2%	6%	5%	
Hotel Santa Fe	4%	10%	6%	5%	5%	1%	4%			
Holiday Resort Guam	4%		6%	8%	5%	6%				
Pacific Bay Hotel	3%	10%	13%	3%		3%	2%	4%		
Oceanview Hotel	3%	5%		3%	5%	3%	2%		11%	
Hyatt Regency Guam	2%			5%	3%	3%		6%		
Leo Palace Resort	2%				3%		7%	2%	5%	
Royal Orchid Guam	2%	5%		3%		1%	2%	2%	5%	
Sheraton Laguna Guam	1%	5%			5%	1%	2%			
Guam Aurora Resort	1%			3%		1%			5%	
Other	1%				3%					
Guam Marriott Resort	1%					1%		4%		
Tumon Bay Capital Hotel	1%			3%						
Ramada Suites Guam	1%							4%		
Total	Count	352	21	31	37	37	68	45	49	19

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure
- 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	62%	70%	55%	56%	64%	61%	63%	
	Pleasure	53%	63%	45%	44%	55%	45%	60%	
	Short travel time	52%	41%	56%	67%	55%	51%	53%	
	Shopping	36%	46%	32%	24%	23%	24%	49%	
	Relax	30%	26%	30%	42%	36%	29%	32%	
	Water sports	29%	39%	24%	18%	14%	26%	32%	
	Recomm- friend/family/trvl agnt	26%	37%	18%	16%	23%	20%	33%	
	Price	26%	30%	22%	29%	23%	22%	31%	
	Previous trip	23%	12%	26%	42%	36%	27%	20%	
	Safe	21%	20%	19%	20%	41%	21%	20%	
	Married/ Attn wedding	9%	1%	21%	9%	9%	12%	7%	
	Scuba	6%	8%	7%	2%	5%	6%	7%	
	Other	6%	7%	3%	7%	5%	6%	6%	
	Honeymoon	4%	1%	9%	5%		7%	2%	
	Golf	3%		2%	4%	23%	6%	1%	
	Company/ Business Trip	3%	1%	6%	4%		3%	2%	
	Organized sports	3%	3%	3%	4%		1%	4%	
	Visit friends/ Relatives	2%	2%	3%	2%		2%	2%	
	Company Sponsored	1%		2%	2%		1%	1%	
	Career Cert/ Testing	1%	1%	1%			1%	1%	
	Convention/ Trade/ Conference	0%			2%		1%		
	Total	Count	351	155	117	55	22	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	62%	57%	68%	62%	61%	60%	67%	76%	37%	
	Pleasure	53%	52%	65%	46%	44%	46%	56%	57%	63%	
	Short travel time	52%	43%	48%	49%	58%	49%	58%	67%	37%	
	Shopping	36%	29%	39%	41%	25%	40%	31%	37%	42%	
	Relax	30%	14%	26%	24%	28%	34%	42%	37%	16%	
	Water sports	29%	19%	32%	32%	22%	31%	27%	24%	32%	
	Recomm- friend/family/trvl agnt	26%	43%	23%	27%	31%	29%	18%	16%	47%	
	Price	26%	29%	19%	19%	19%	26%	33%	27%	37%	
	Previous trip	23%	5%	26%	22%	22%	29%	31%	24%	11%	
	Safe	21%	14%	19%	22%	14%	18%	31%	29%	16%	
	Married/ Attn wedding	9%	10%	3%	11%	14%	16%	9%	8%	5%	
	Scuba	6%		3%	5%	6%	3%	4%	10%	26%	
	Other	6%	10%	13%	5%	6%	1%	9%	4%	5%	
	Honeymoon	4%		3%	3%	14%	6%	9%			
	Golf	3%		3%	3%	3%	3%	9%	4%		
	Company/ Business Trip	3%	5%	6%	8%	6%	1%		2%		
	Organized sports	3%	5%		3%	3%	3%			11%	
	Visit friends/ Relatives	2%		3%		3%	1%		4%	11%	
	Company Sponsored	1%		3%	3%		1%				
	Career Cert/ Testing	1%		3%			1%				
	Convention/ Trade/ Conference	0%								5%	
	Total	Count	351	21	31	37	36	68	45	49	19

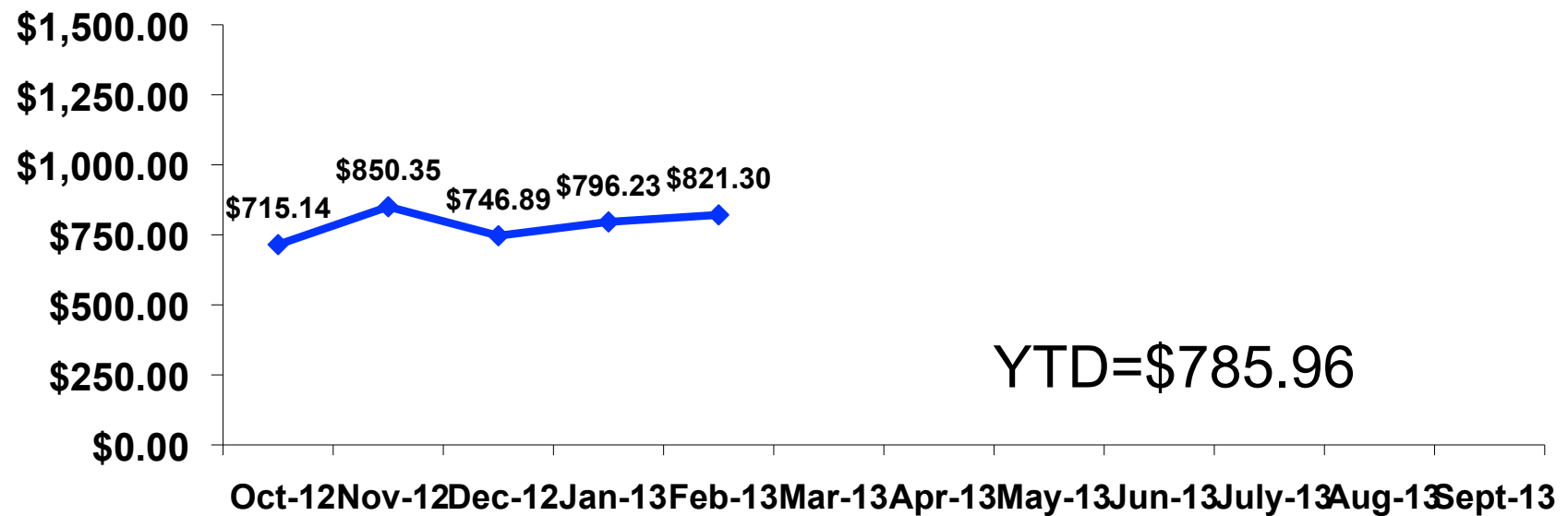
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥93.00/US\$1

- \$1,556.72 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$16,129 = maximum (highest amount recorded for the entire sample)
- \$821.30 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

¥93.00=\$1

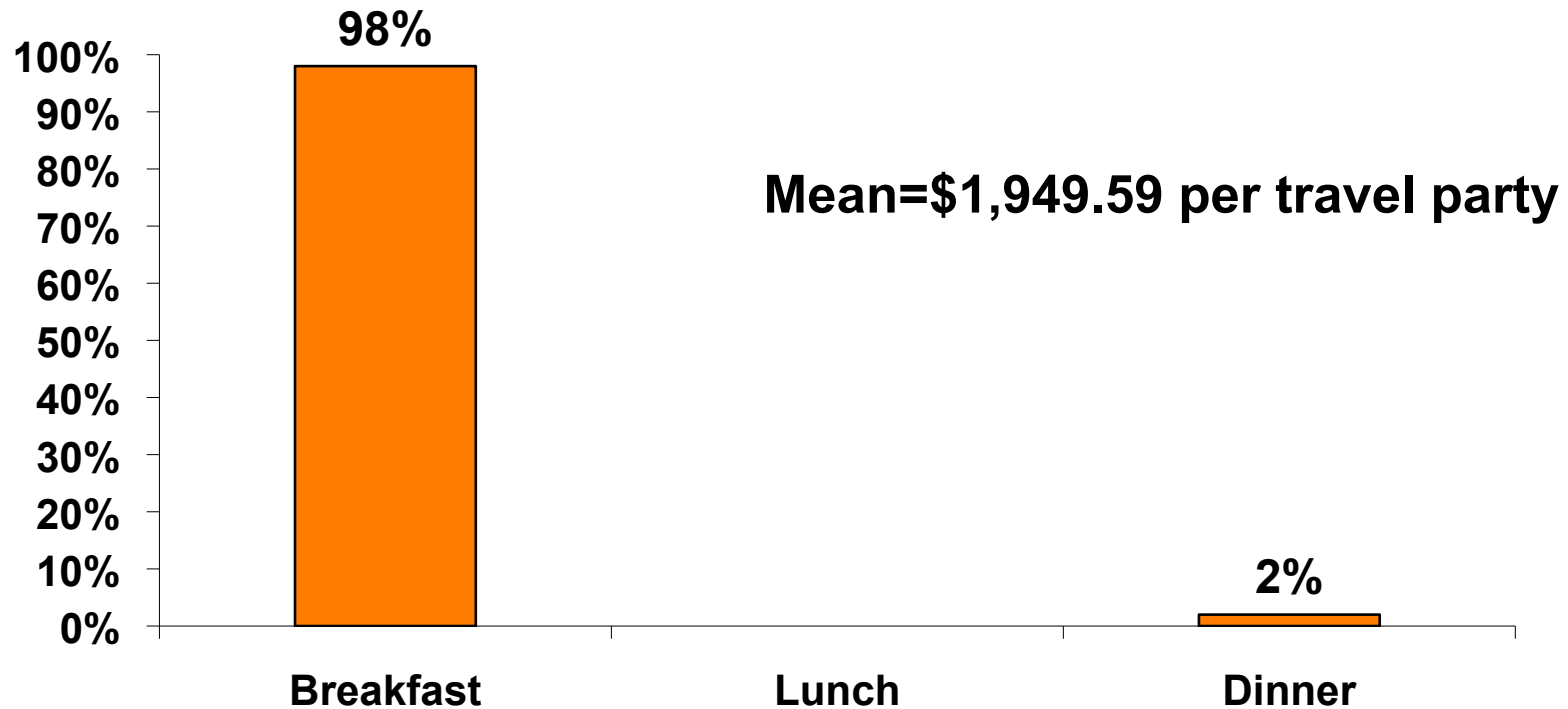
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,504.28
Air & Accommodation w/ daily meal package	\$1,949.59
Air only	\$1,974.19
Accommodation only	\$517.92
Accommodation w/ daily meal only	\$752.69
Food & Beverages in Hotel	\$-
Ground transportation - Japan	\$72.34
Ground transportation - Guam	\$32.26
Optional tours/ activities	\$236.77
Other expenses	\$1,366.49
Total Prepaid	\$1,556.72

Prepaid Meal Breakdown

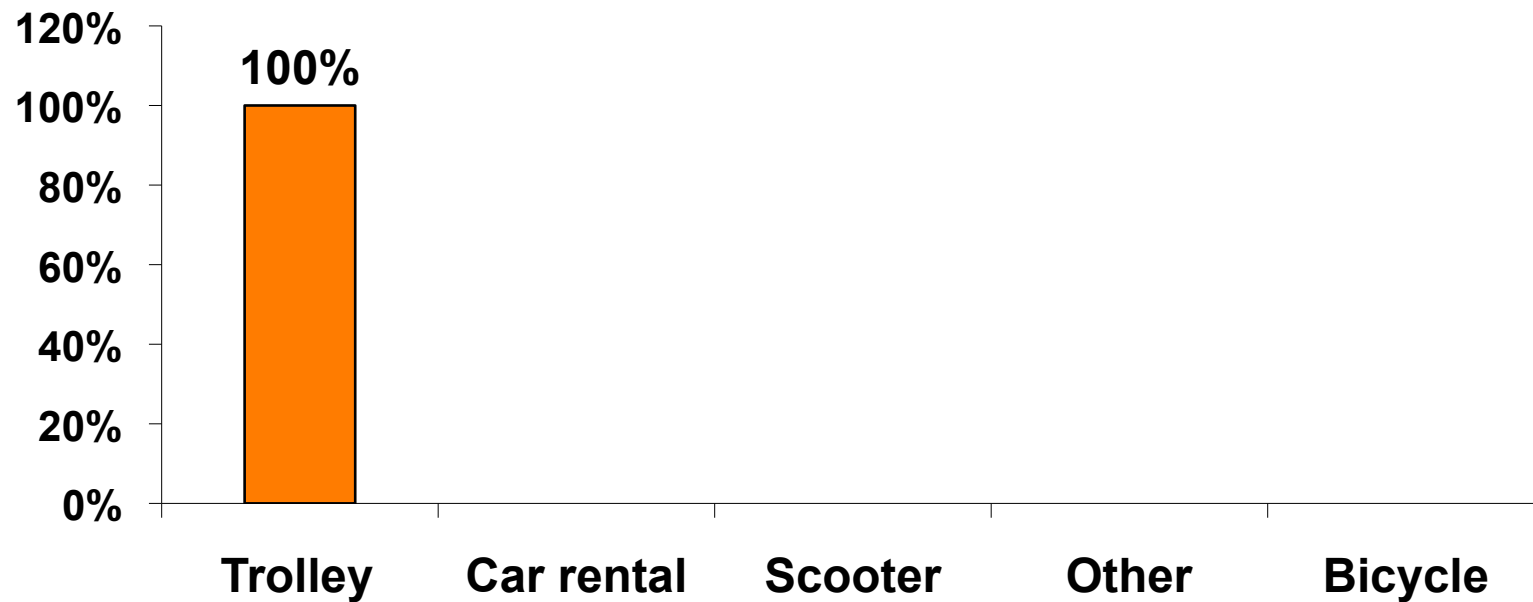
Air/ Accommodations with Daily Meal Package

n=91



Prepaid Ground Transportation

n=2

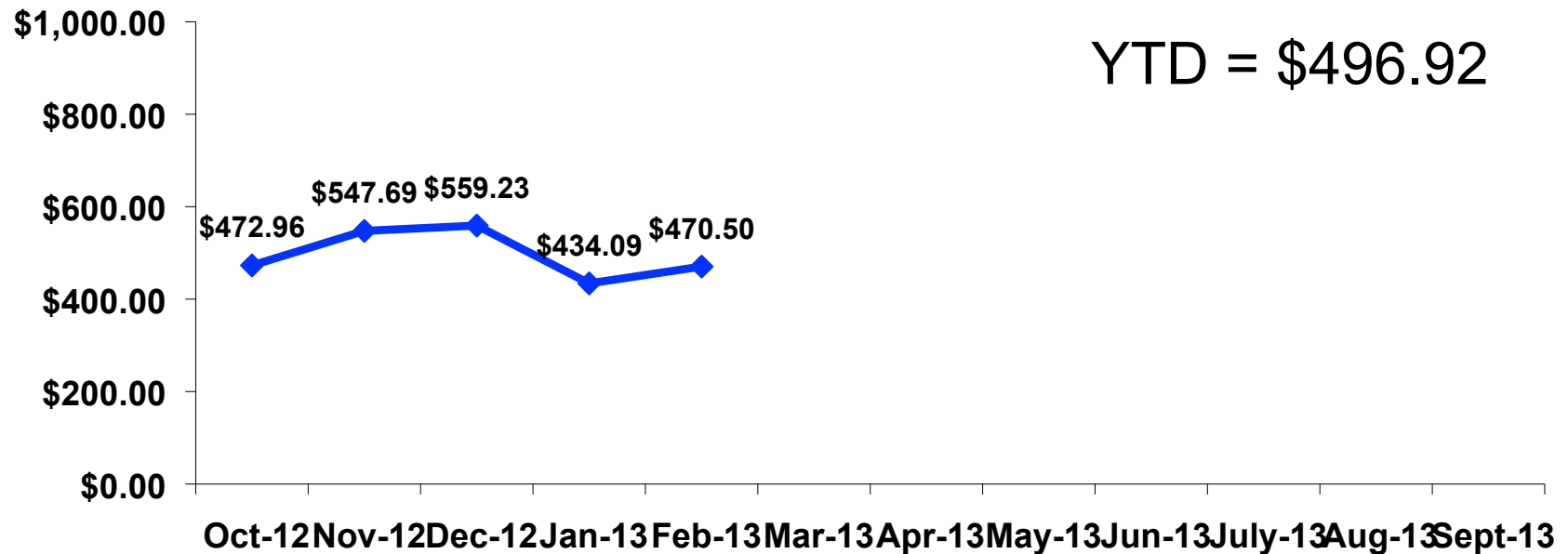


Mean=\$32.26 per travel party

On-Island Expenditures

- \$699.09 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,500 = Maximum (highest amount recorded for the entire sample)
- \$470.50 = overall mean average per person on-island expenditure

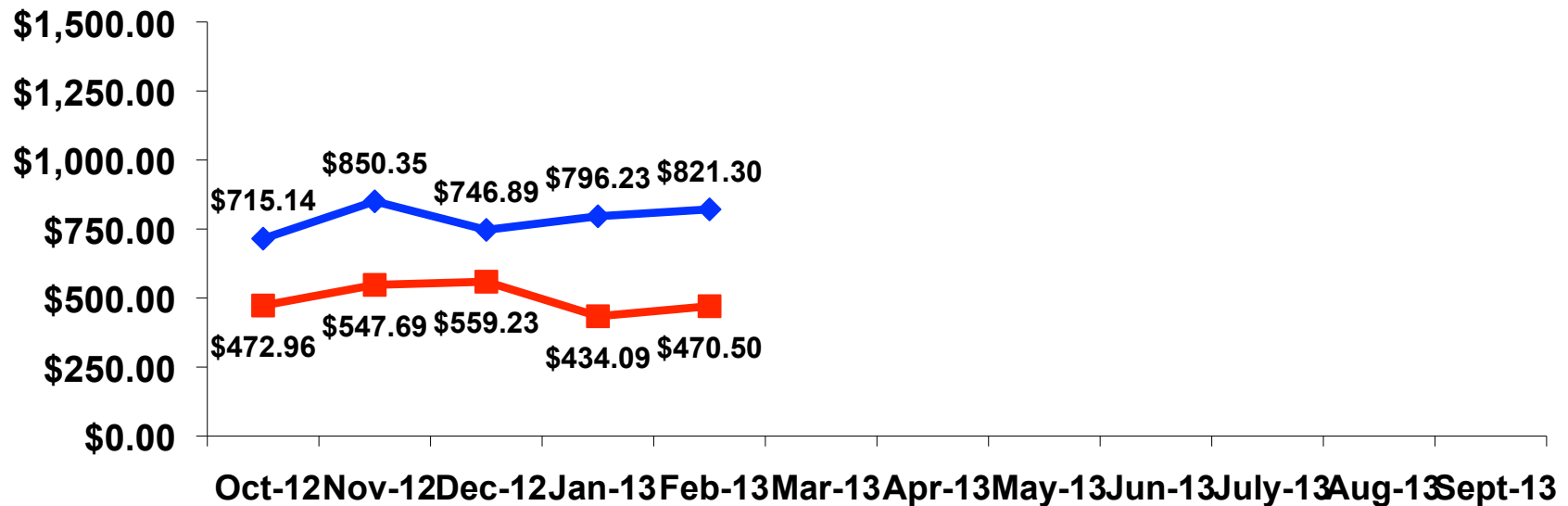
On-Island Expenditures Per Person



Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$785.96

On-Isle YTD = \$496.92



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	\$470.50	\$449.31	\$491.45	\$417.52	\$476.58	\$482.44	\$370.35	\$431.98	\$613.16	\$507.71	\$439.33
	Median	\$368	\$350	\$400	\$350	\$350	\$350	\$337	\$370	\$523	\$378	\$310
	Minimum	\$0	\$0	\$0	\$0	\$0	\$50	\$0	\$0	\$0	\$14	\$0
	Maximum	\$2,550	\$2,550	\$1,800	\$2,500	\$2,500	\$2,550	\$1,010	\$1,505	\$1,800	\$1,109	\$1,167

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$32.57	\$41.93	\$23.31	\$13.34	\$37.96	\$47.78	\$99.87
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$50
F&B FF/STORE	Mean	\$33.87	\$43.66	\$24.18	\$23.15	\$34.01	\$47.16	\$56.09
	Median	\$10	\$20	\$5	\$10	\$10	\$20	\$0
F&B RESTRNT	Mean	\$72.53	\$99.08	\$46.27	\$34.28	\$81.92	\$125.82	\$143.91
	Median	\$28	\$50	\$20	\$10	\$30	\$60	\$100
OPT TOUR	Mean	\$99.47	\$146.15	\$53.31	\$65.34	\$94.36	\$206.02	\$109.26
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$147.78	\$125.66	\$169.64	\$114.65	\$174.93	\$177.07	\$153.91
	Median	\$40	\$20	\$60	\$20	\$50	\$50	\$110
GIFT- OTHER	Mean	\$111.49	\$132.77	\$90.44	\$71.86	\$142.35	\$135.89	\$157.22
	Median	\$50	\$80	\$50	\$40	\$70	\$100	\$100
TRANS	Mean	\$13.91	\$16.47	\$11.38	\$6.34	\$21.04	\$17.42	\$11.04
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$187.98	\$228.41	\$148.01	\$126.57	\$140.94	\$405.58	\$319.78
	Median	\$0	\$0	\$0	\$8	\$0	\$0	\$0
TOTAL	Mean	\$699.09	\$833.28	\$566.42	\$455.20	\$727.34	\$1,162.75	\$1,046.74
	Median	\$500	\$600	\$450	\$370	\$600	\$700	\$800

On-Island Expenditures

First Timers & Repeaters

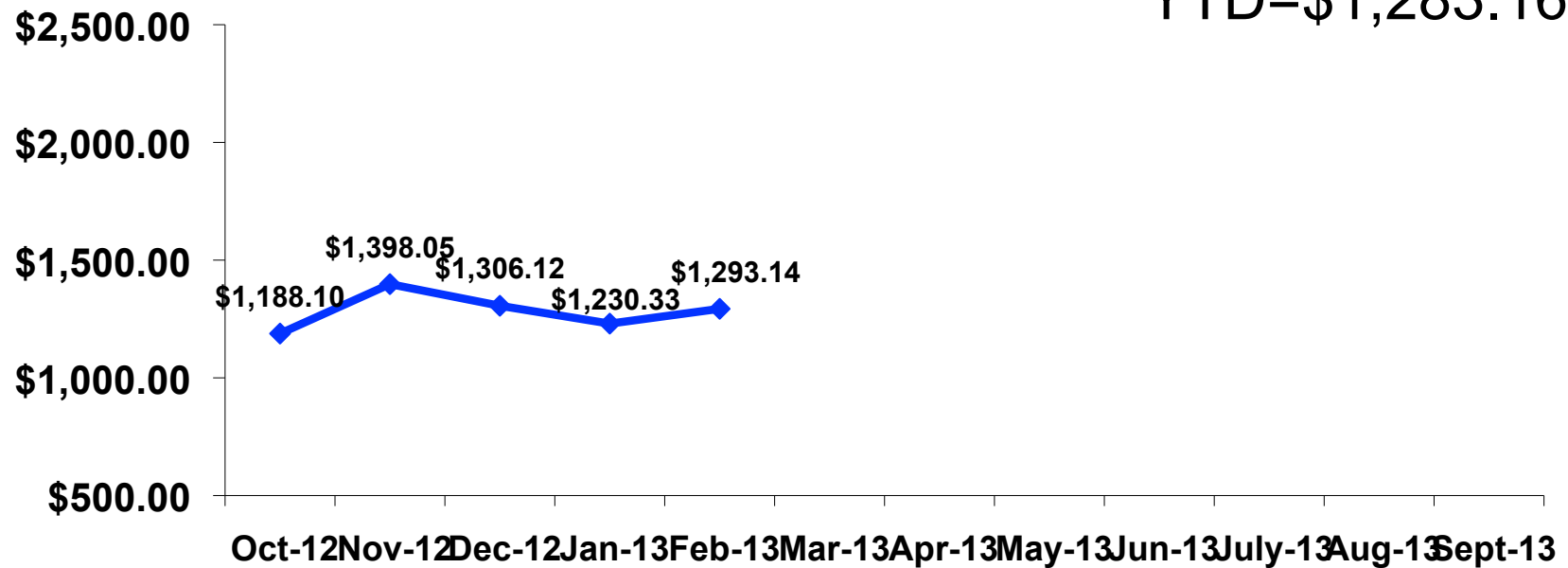
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$32.57	\$22.79	\$50.73
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$33.87	\$26.84	\$46.20
	Median	\$10	\$10	\$10
F&B RESTRNT	Mean	\$72.53	\$52.94	\$108.97
	Median	\$28	\$30	\$20
OPT TOUR	Mean	\$99.47	\$77.04	\$139.70
	Median	\$0	\$7	\$0
GIFT- SELF	Mean	\$147.78	\$134.02	\$172.54
	Median	\$40	\$30	\$85
GIFT- OTHER	Mean	\$111.49	\$101.31	\$130.21
	Median	\$50	\$60	\$50
TRANS	Mean	\$13.91	\$8.99	\$23.03
	Median	\$0	\$0	\$0
OTHER	Mean	\$187.98	\$173.99	\$215.12
	Median	\$0	\$0	\$0
TOTAL	Mean	\$699.09	\$597.43	\$886.01
	Median	\$500	\$450	\$600

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,293.14 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,602 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

YTD=\$1,283.16

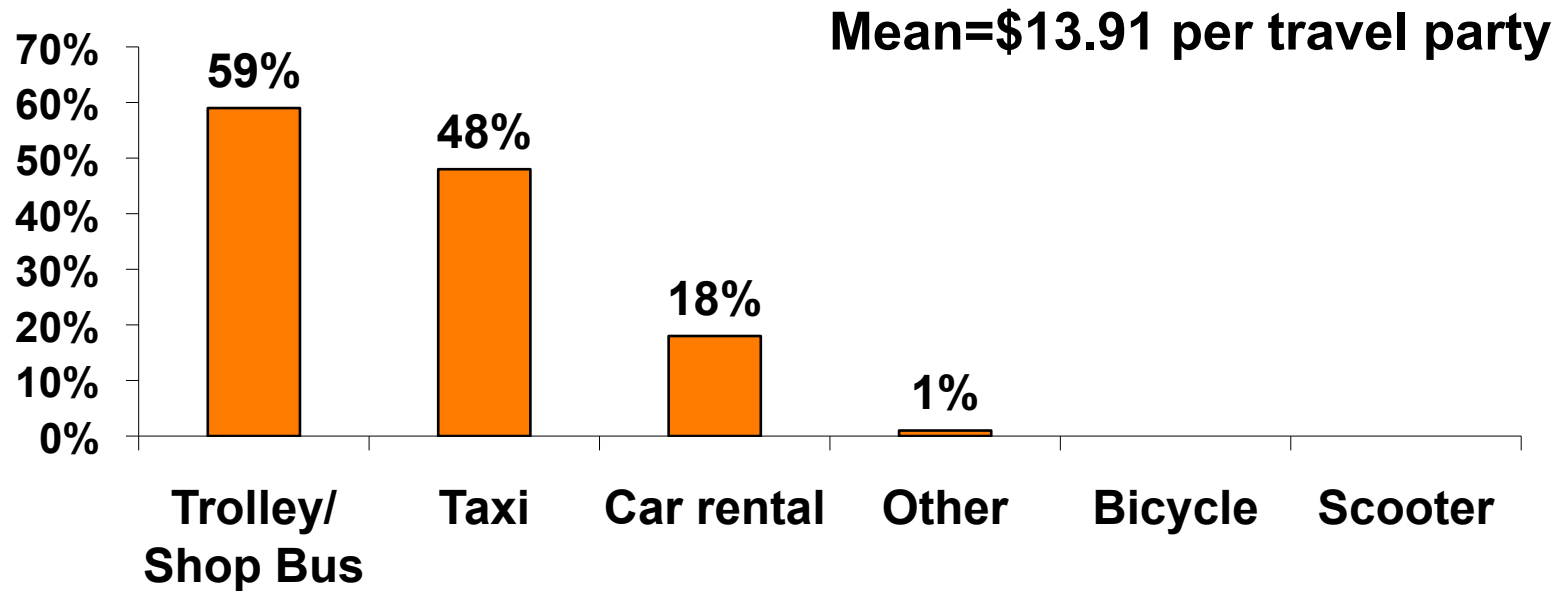


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$32.57
Food & beverage in fast food restaurant/ convenience store	\$33.87
Food & beverage at restaurants or drinking establishments outside a hotel	\$72.53
Optional tours and activities	\$99.47
Gifts/ souvenirs for yourself/companions	\$147.78
Gifts/ souvenirs for friends/family at home	\$111.49
Local transportation	\$13.91
Other expenses not covered	\$187.98
Average Total	\$699.09

Local Transportation

n=94



Guam Airport Expenditures

- \$39.24 = Mean
- \$3 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,500 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

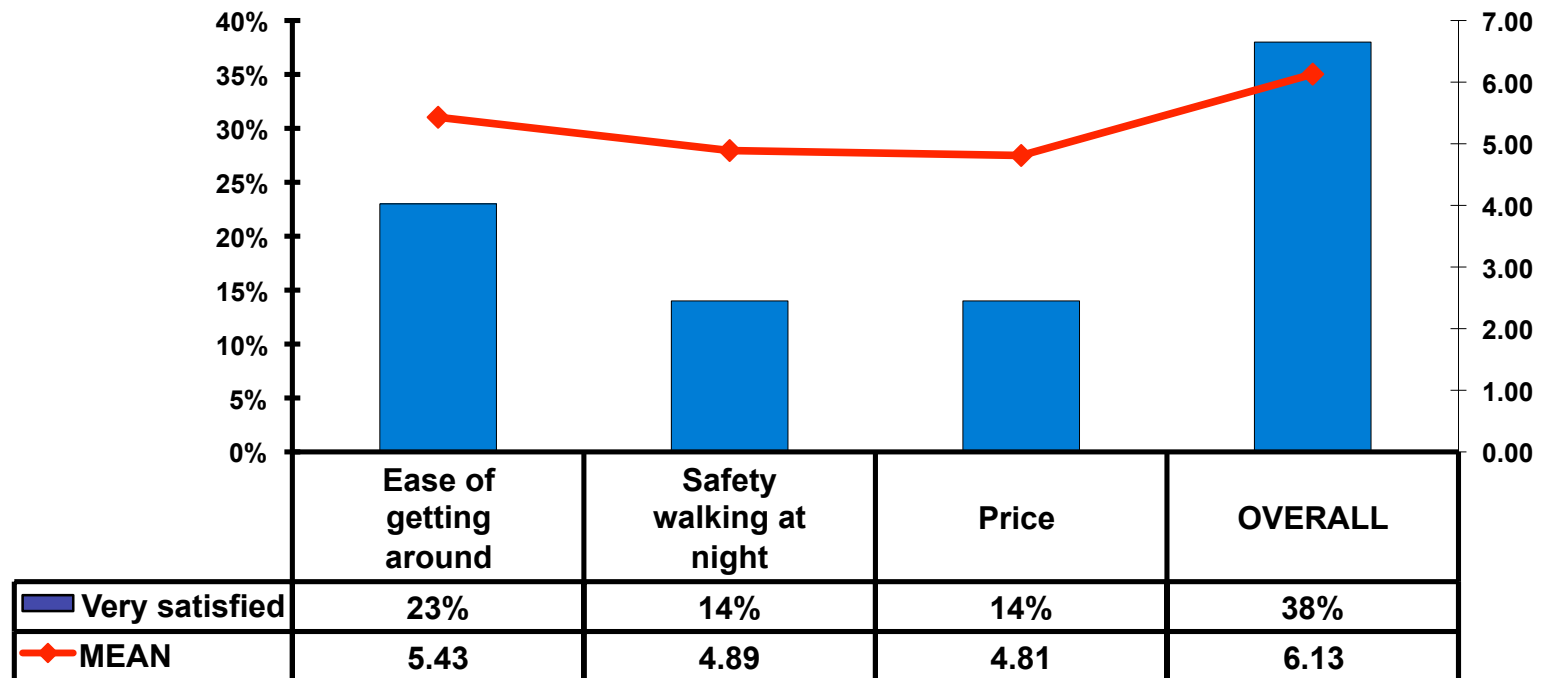
	MEAN \$
Food & Beverages	\$8.00
Gifts/Souvenirs Self	\$10.74
Gifts/Souvenirs Others	\$20.49
Total	\$39.24

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

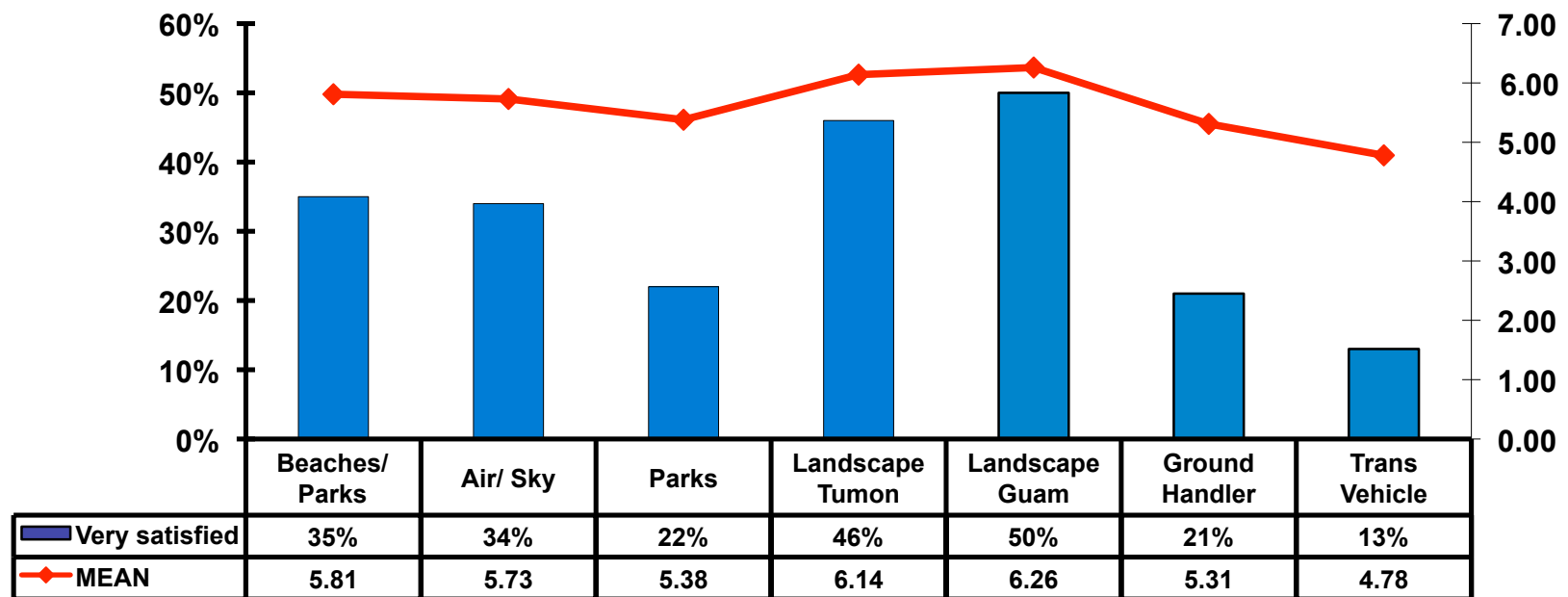
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

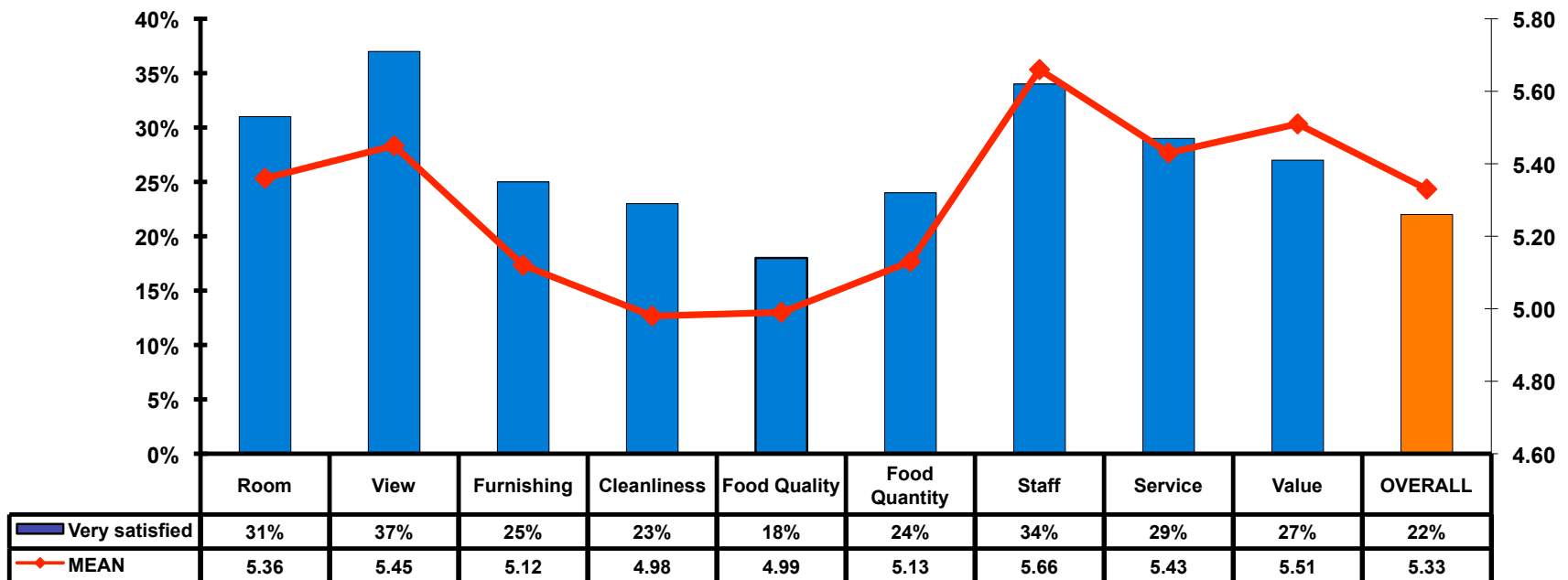
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

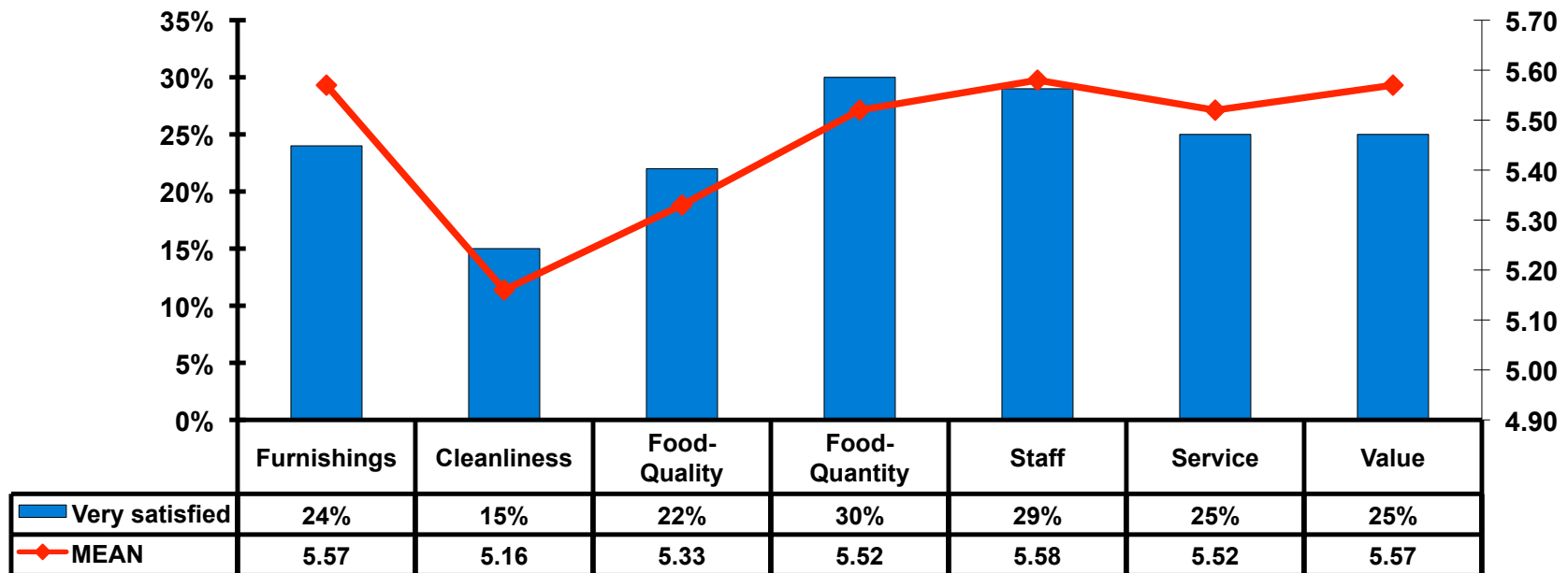
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

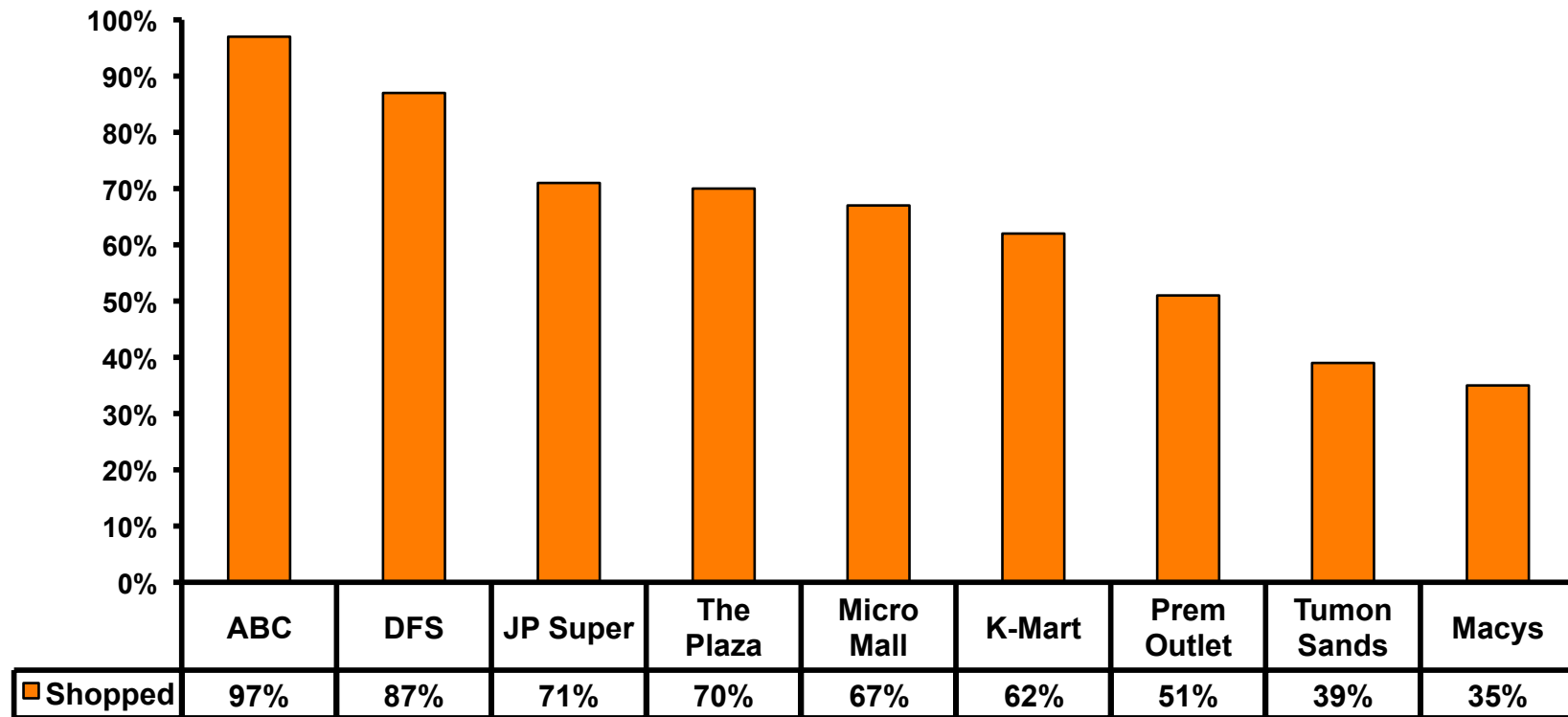
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

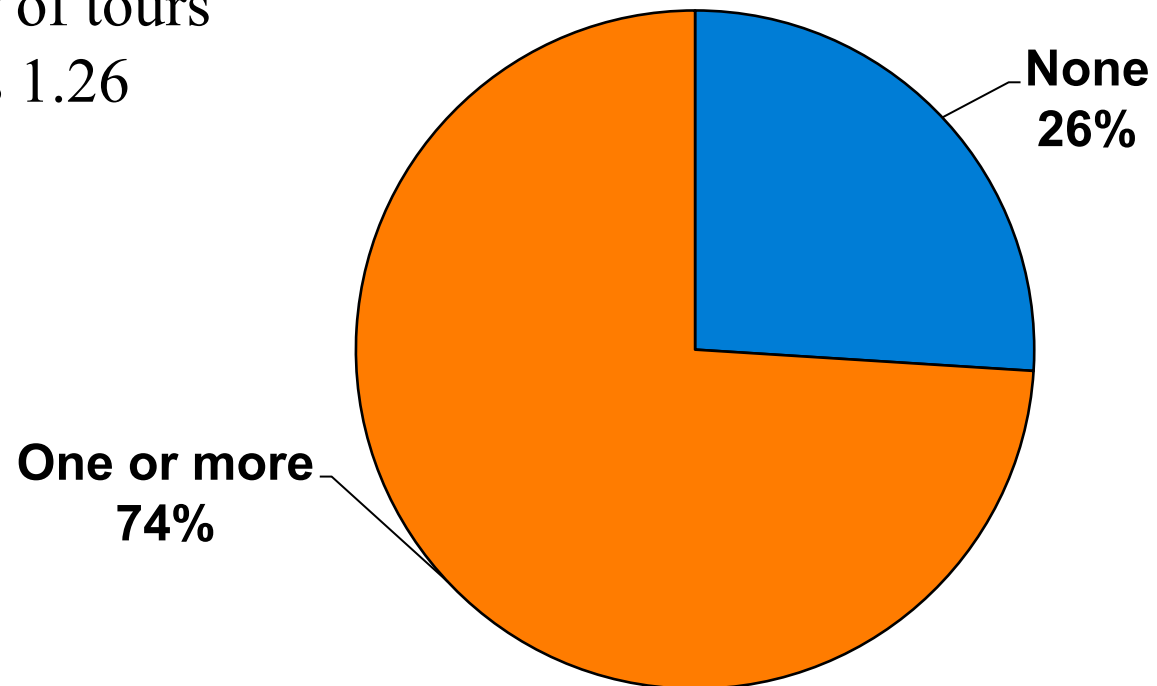
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

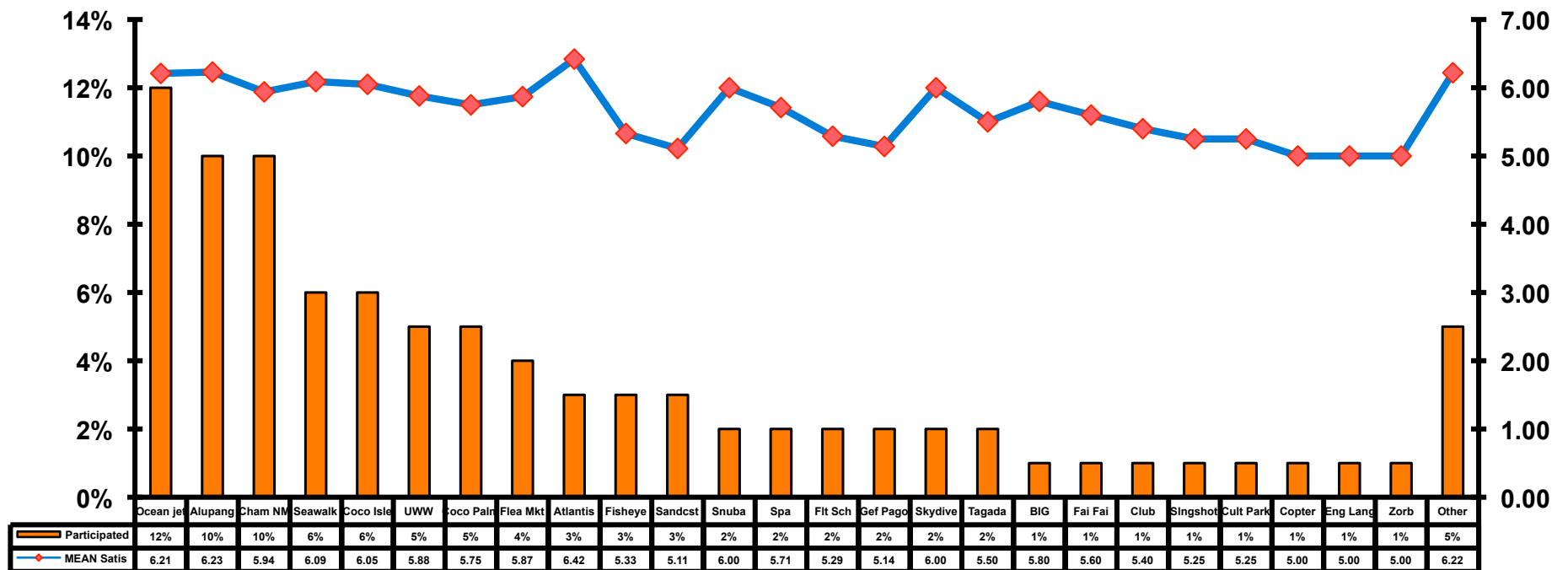
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 62%	Score of 6 to 7 = 58%
Score of 4 to 5 = 33%	Score of 4 to 5 = 37%
Score 1 to 3 = 5%	Score 1 to 3 = 4%
MEAN = 5.64	MEAN = 5.51

Optional Tour Participation

- Average number of tours participated in is 1.26



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 = 63%	Score of 6 to 7 = 62%
Score of 4 to 5 = 35%	Score of 4 to 5 = 37%
Score 1 to 3 = 2%	Score 1 to 3 = 1%
MEAN = 5.70	MEAN = 5.68

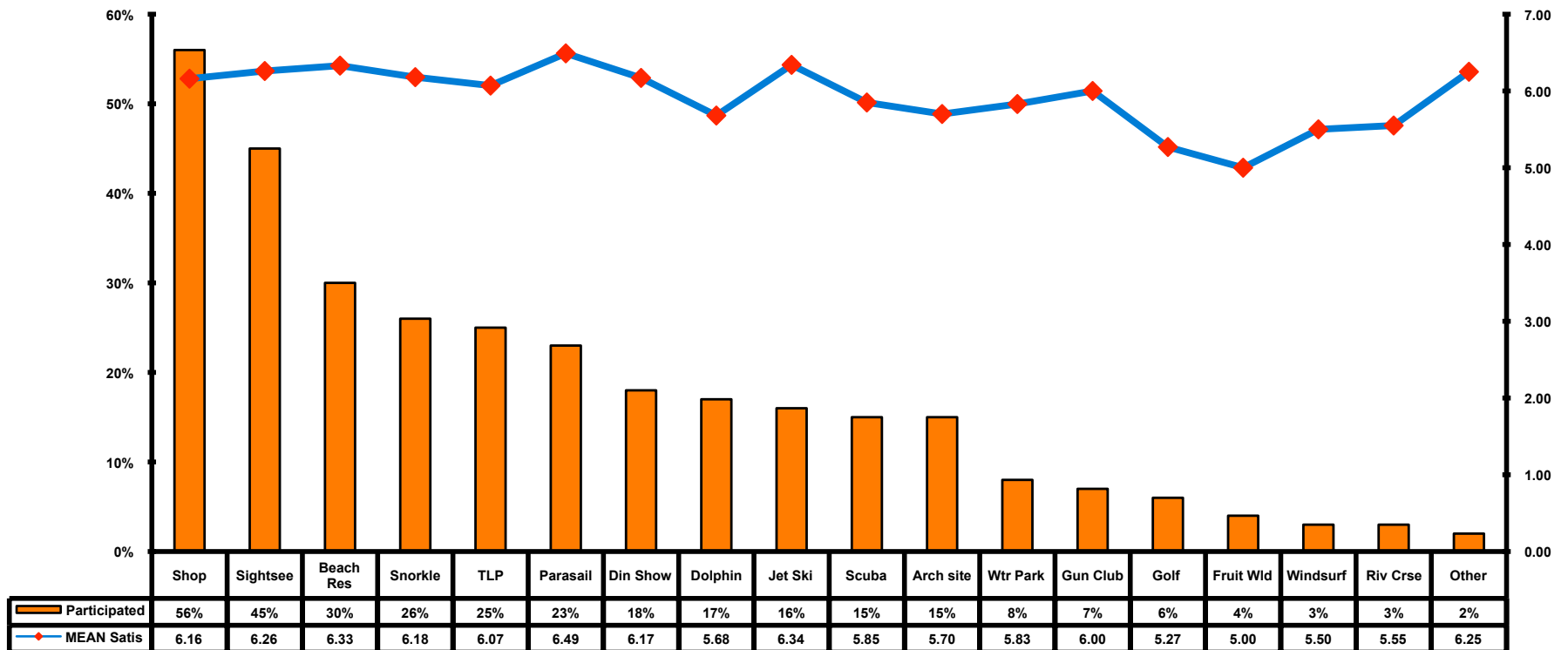
Night Tours Satisfaction

7pt Rating Scale

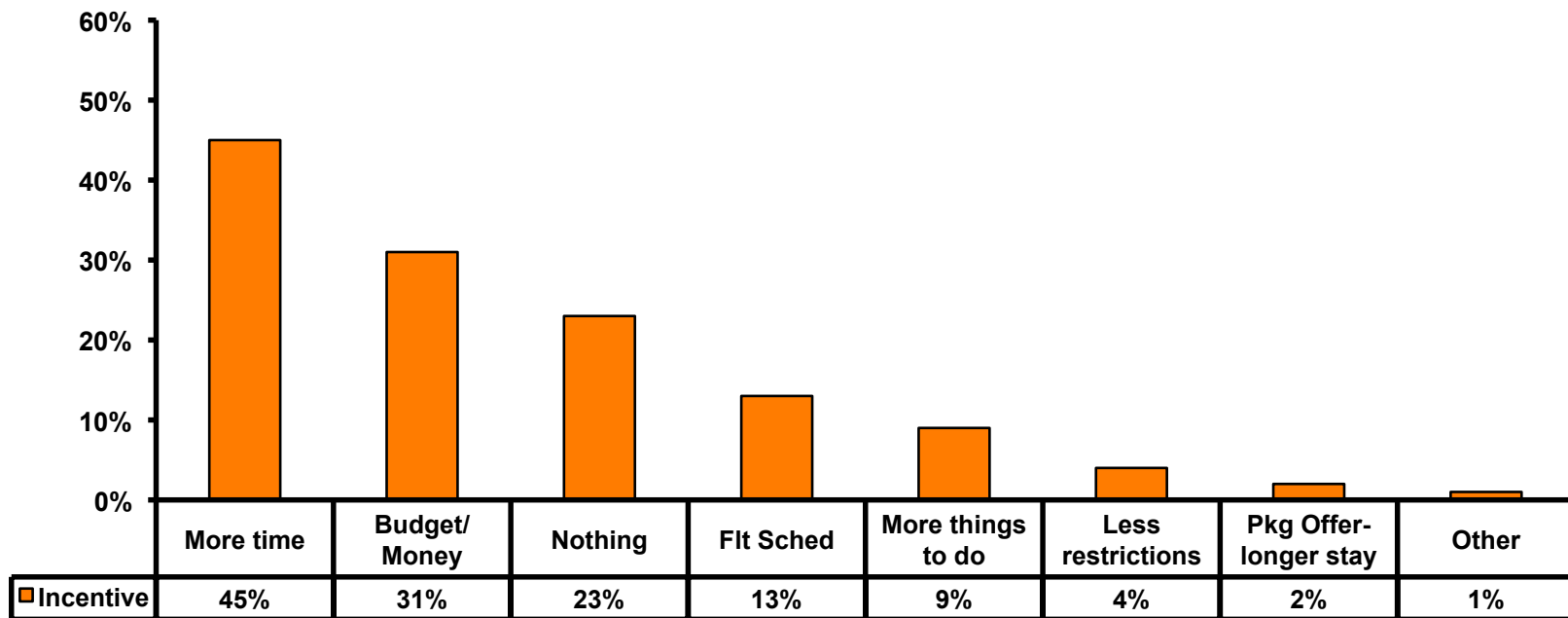
7=Very Satisfied/ 1=Very Dissatisfied

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 = 67%
Score 1 to 3 = 1%	Score 1 to 3 = 1%
MEAN = 4.92	MEAN = 4.90

Satisfaction with Other Activities



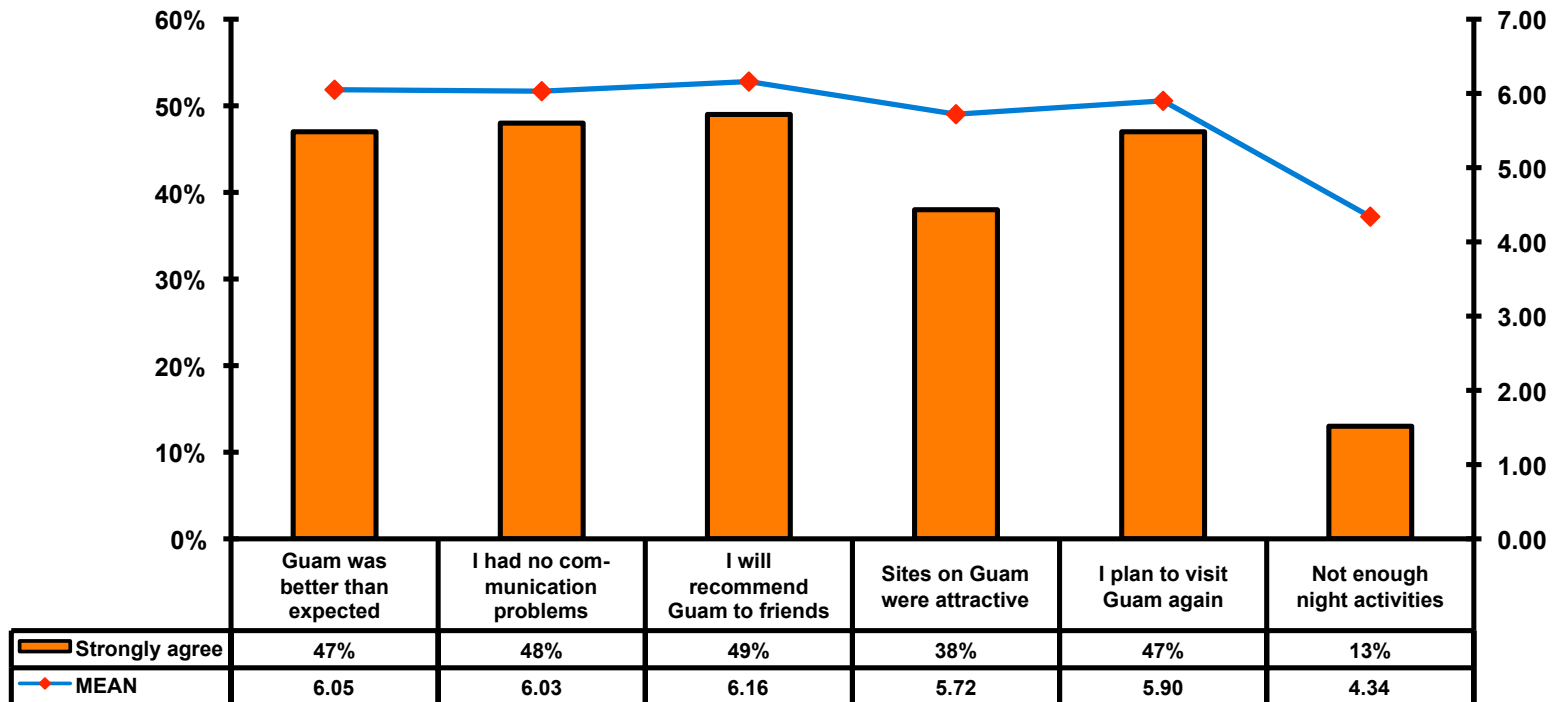
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

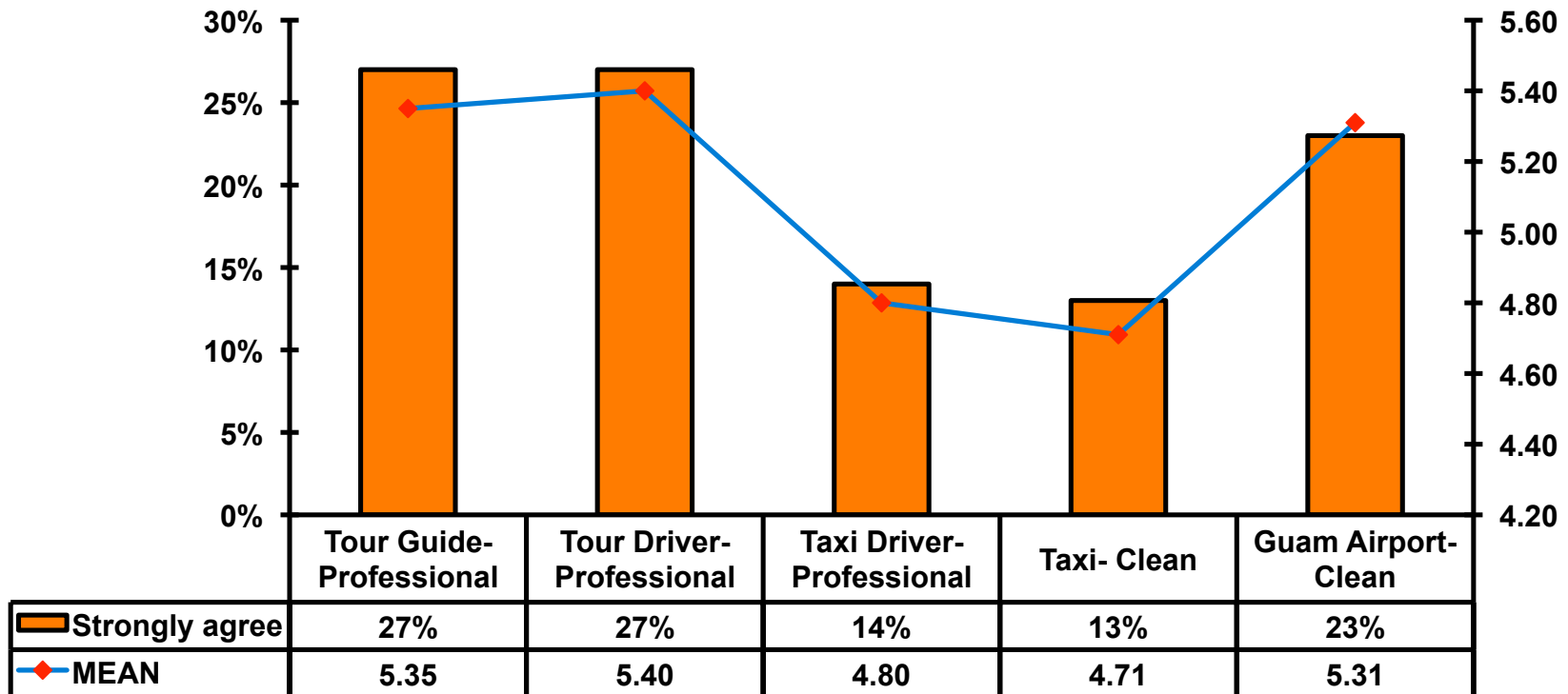
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

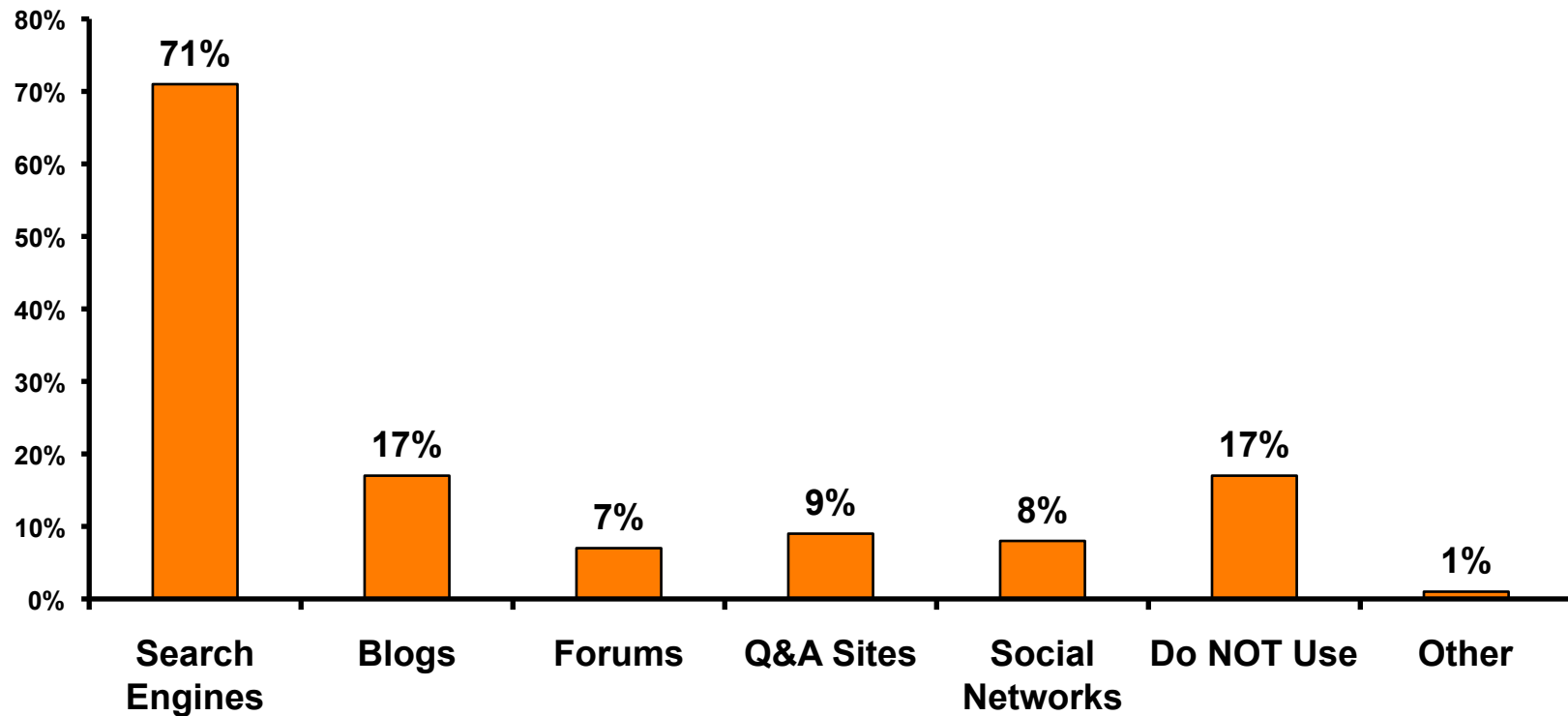
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



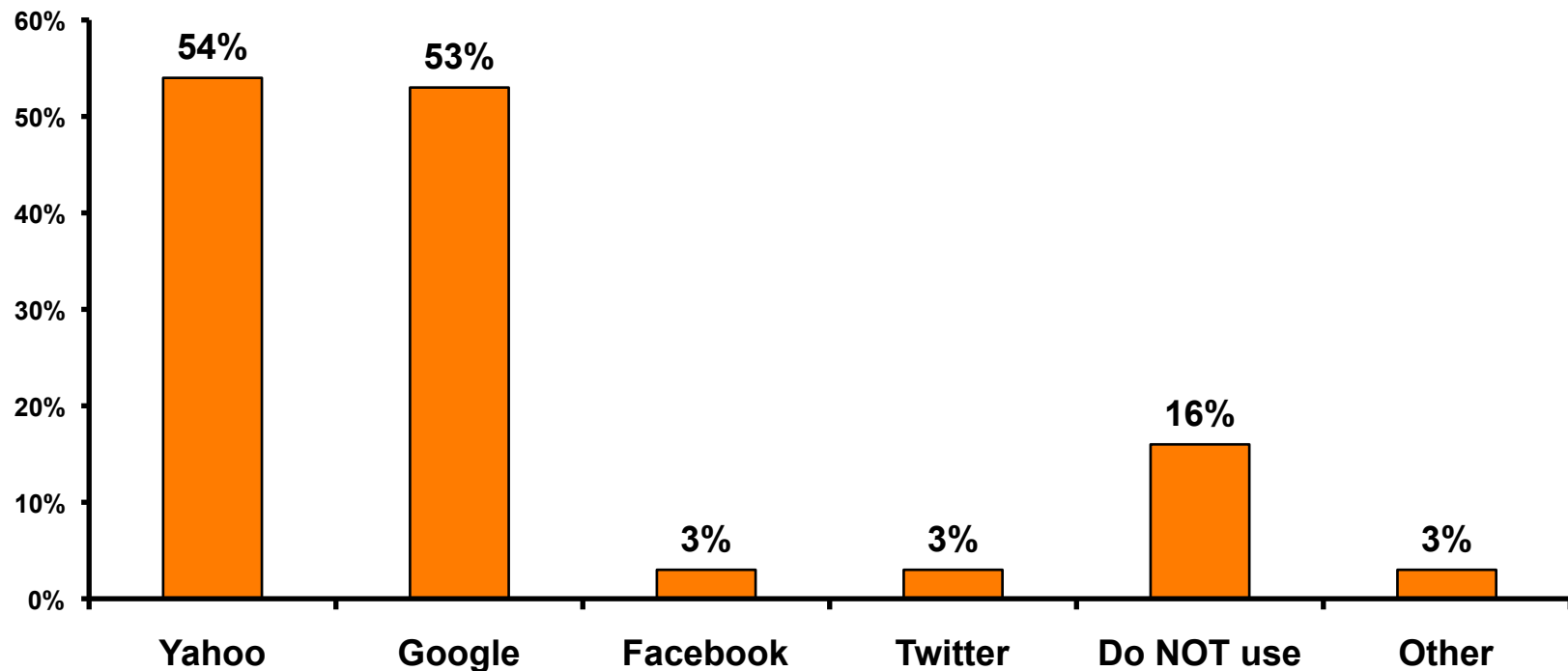
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

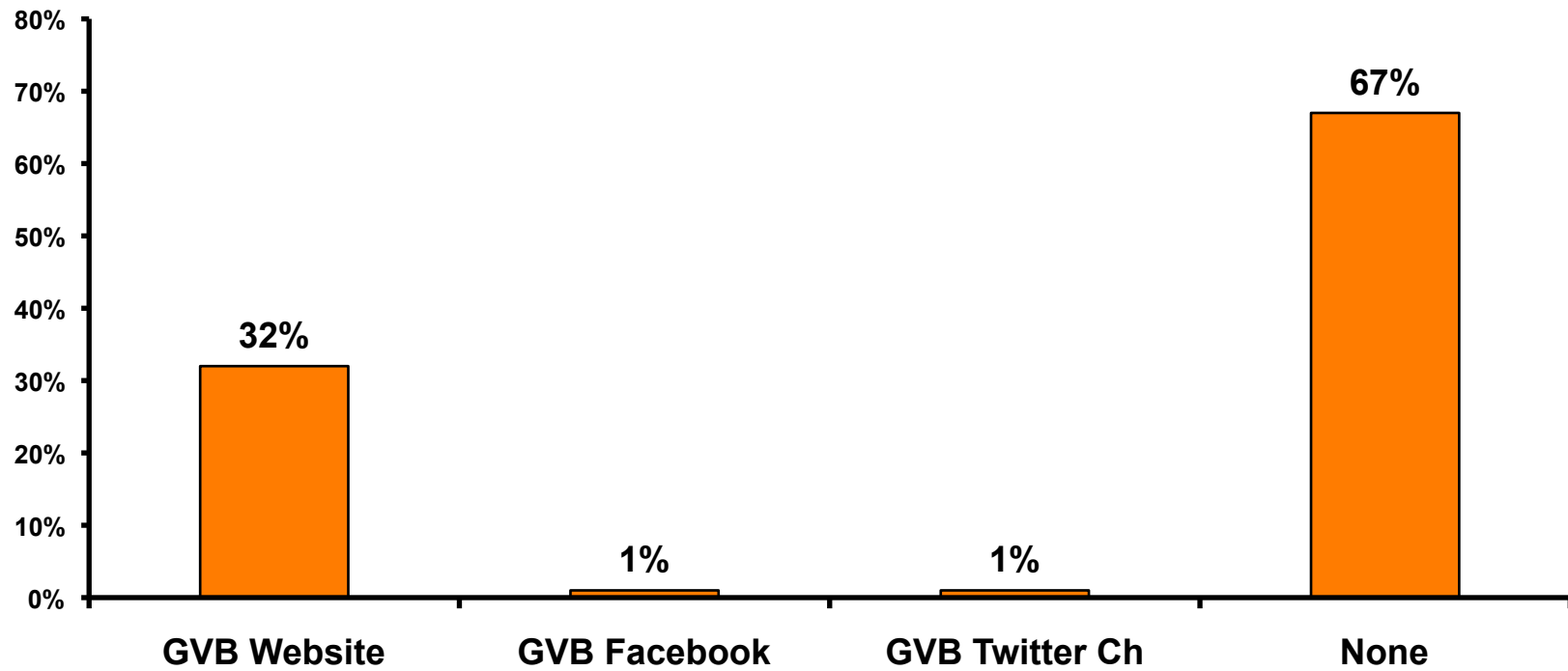


Internet- Things To Do

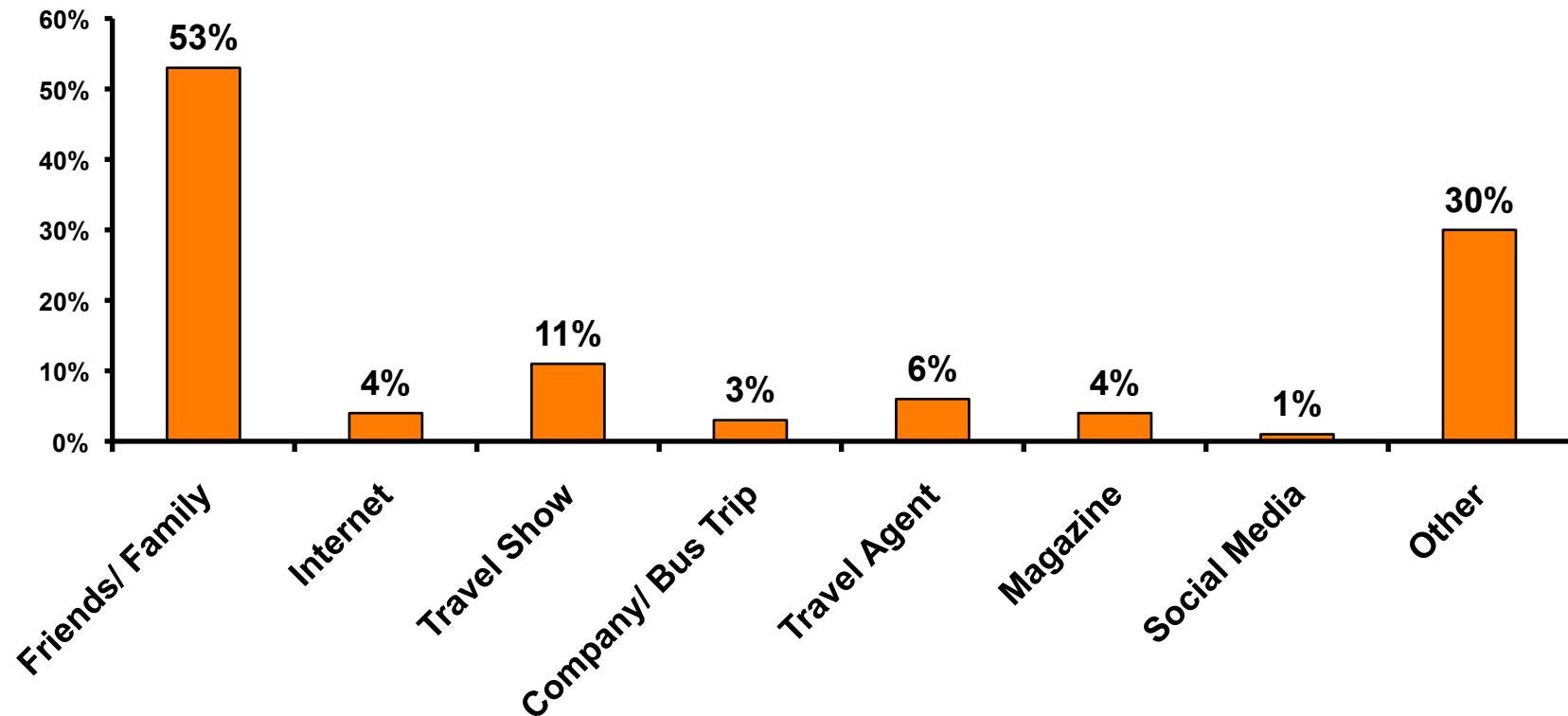
Sources of Info



Internet- GVB Sources

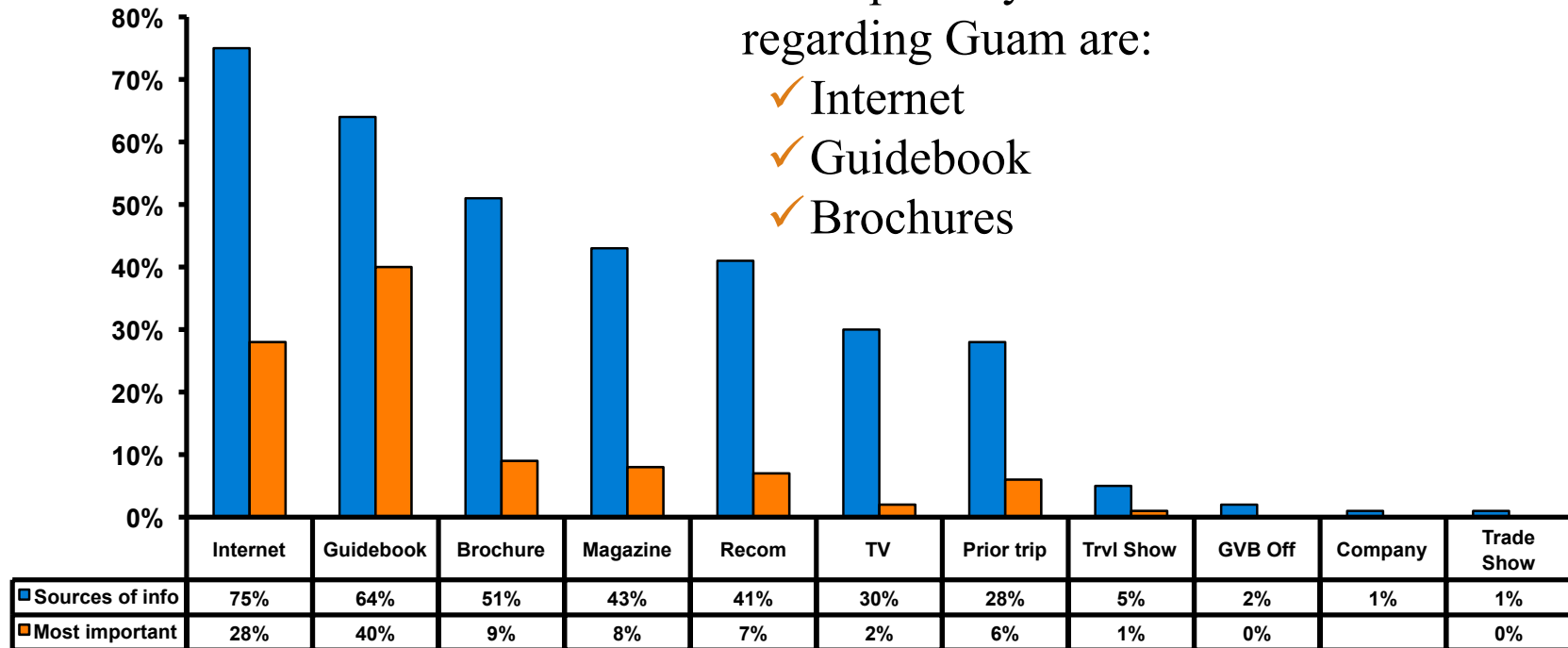


Travel Motivation- Info Sources



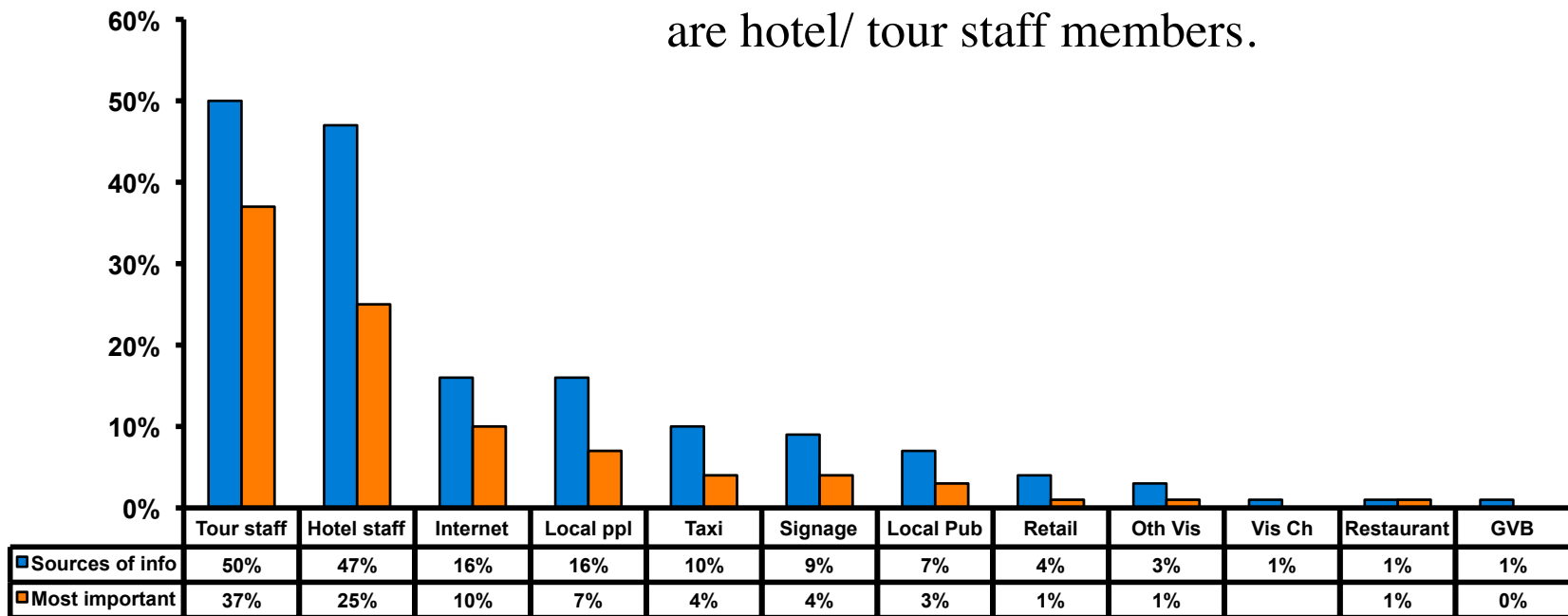
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

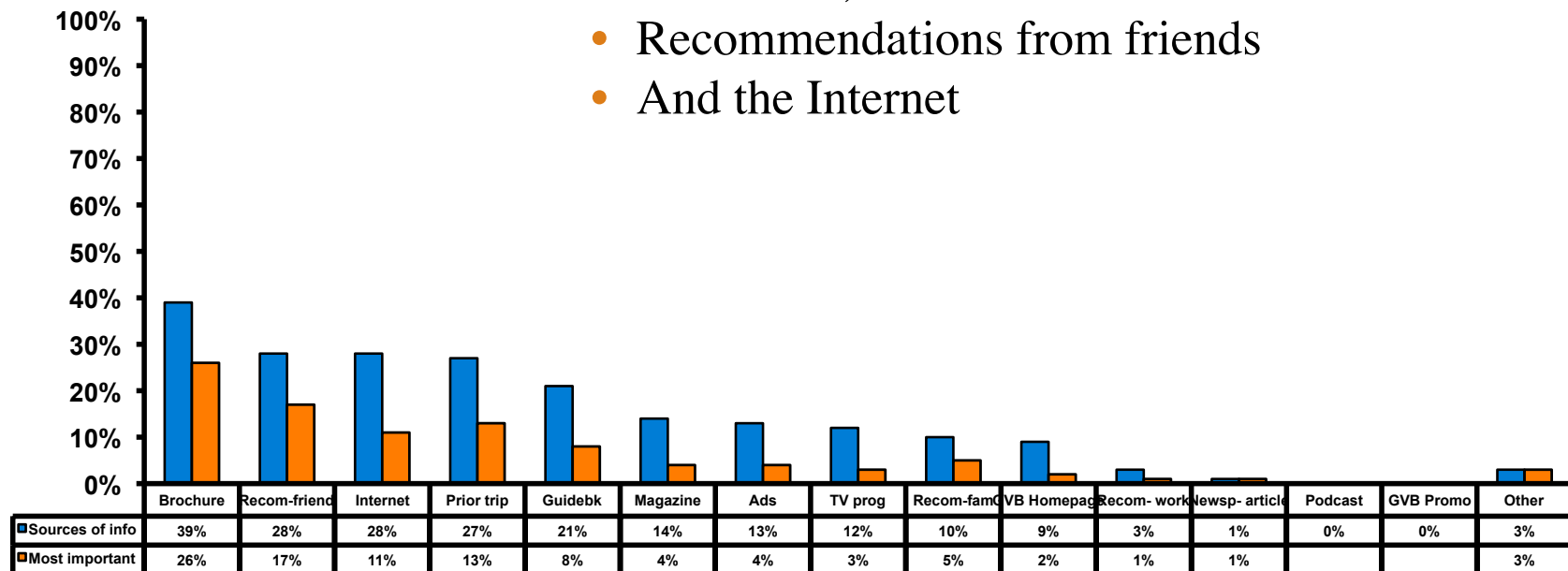
- The primary local source of information are hotel/ tour staff members.



Sources of Information - Motivation

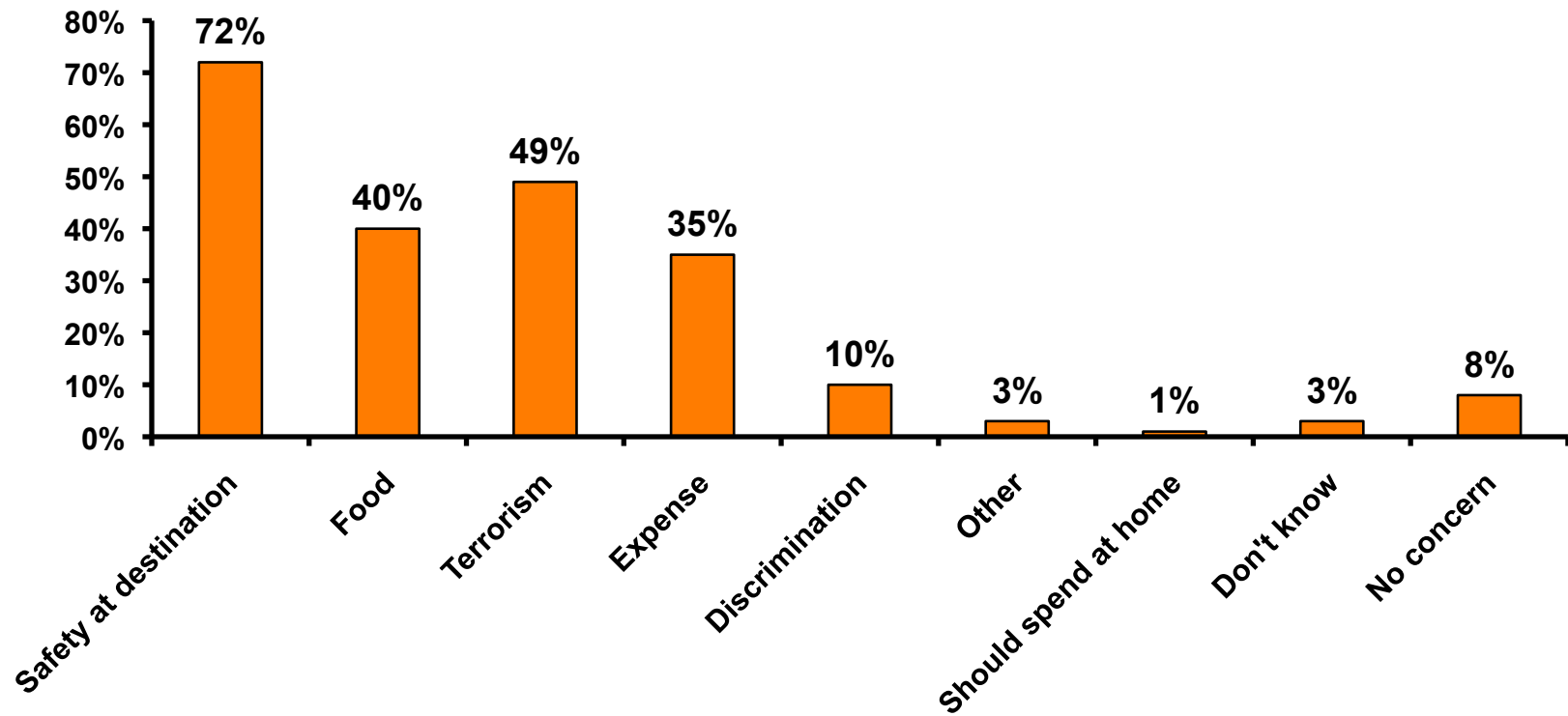
The primary motivational sources of information were.

- Brochures,
- Recommendations from friends
- And the Internet



SECTION 6
OTHER ISSUES

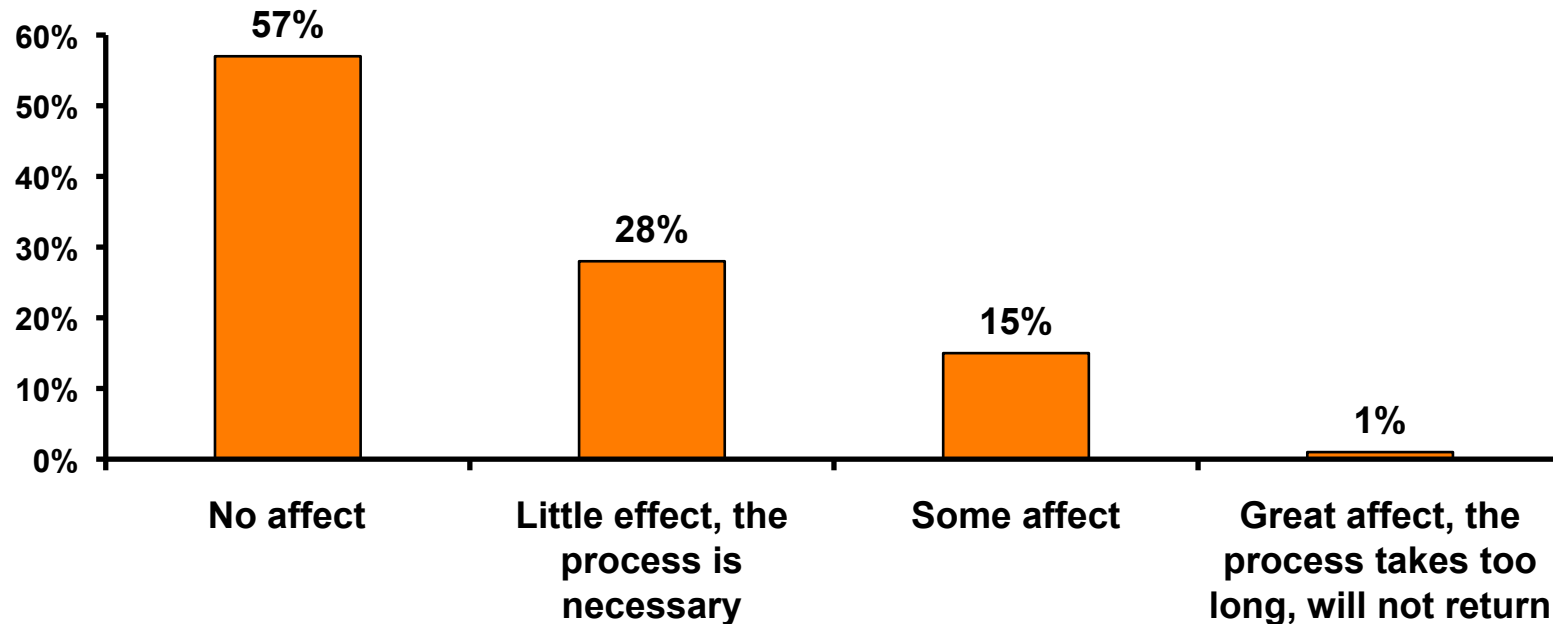
Concerns about travel outside of Japan - Overall



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	72%	79%	62%	71%	83%	81%	65%	73%	73%	75%	82%	63%	63%	
	Terrorism	49%	54%	40%	45%	61%	48%	42%	38%	59%	41%	56%	55%	58%	
	Food	40%	45%	37%	35%	39%	52%	32%	49%	46%	40%	42%	31%	26%	
	Expense	35%	41%	31%	33%	26%	43%	29%	35%	41%	44%	36%	33%	16%	
	Discrimination against Japanese	10%	12%	6%	15%	4%	14%	3%	5%	11%	6%	18%	16%	11%	
	No concerns	8%	4%	15%	5%		5%	10%	16%	5%	4%	2%	12%	16%	
	Don't know	3%	2%	5%	2%	4%		3%		5%	3%		2%	5%	
	Other	3%	3%	3%	7%			6%	5%		4%	2%	2%	11%	
	Should spend at home	1%	1%	3%	2%		5%		3%	3%			2%		
	Total	Count	352	155	117	55	23	21	31	37	37	68	45	49	19

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

