



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2013

JUNE 2013



Prepared by: QMark Research

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Background & Methodology

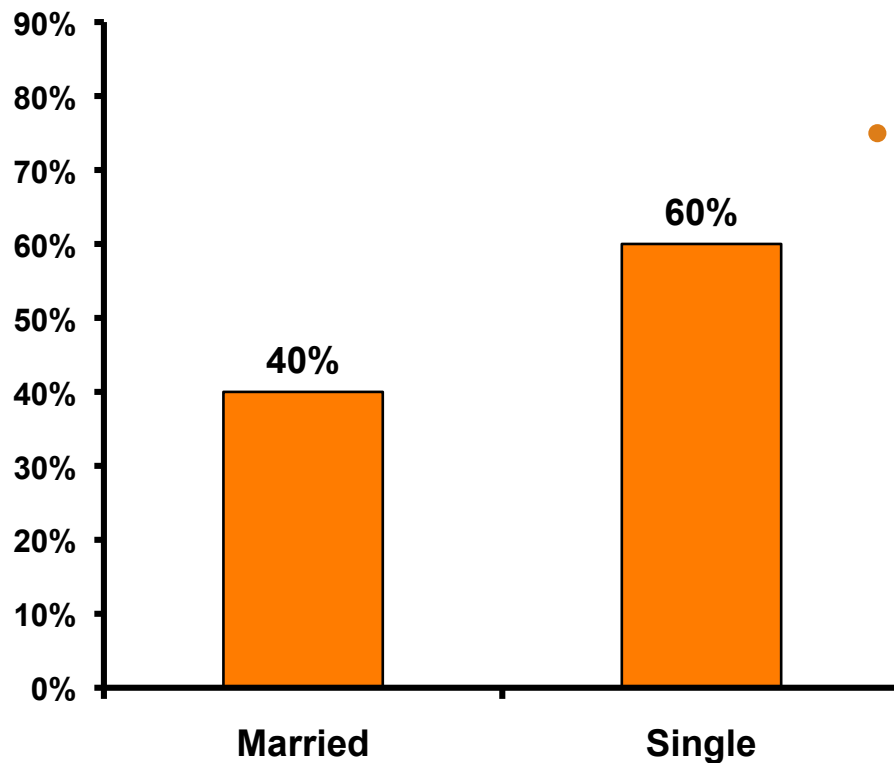
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **350** departing 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 **350** 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.

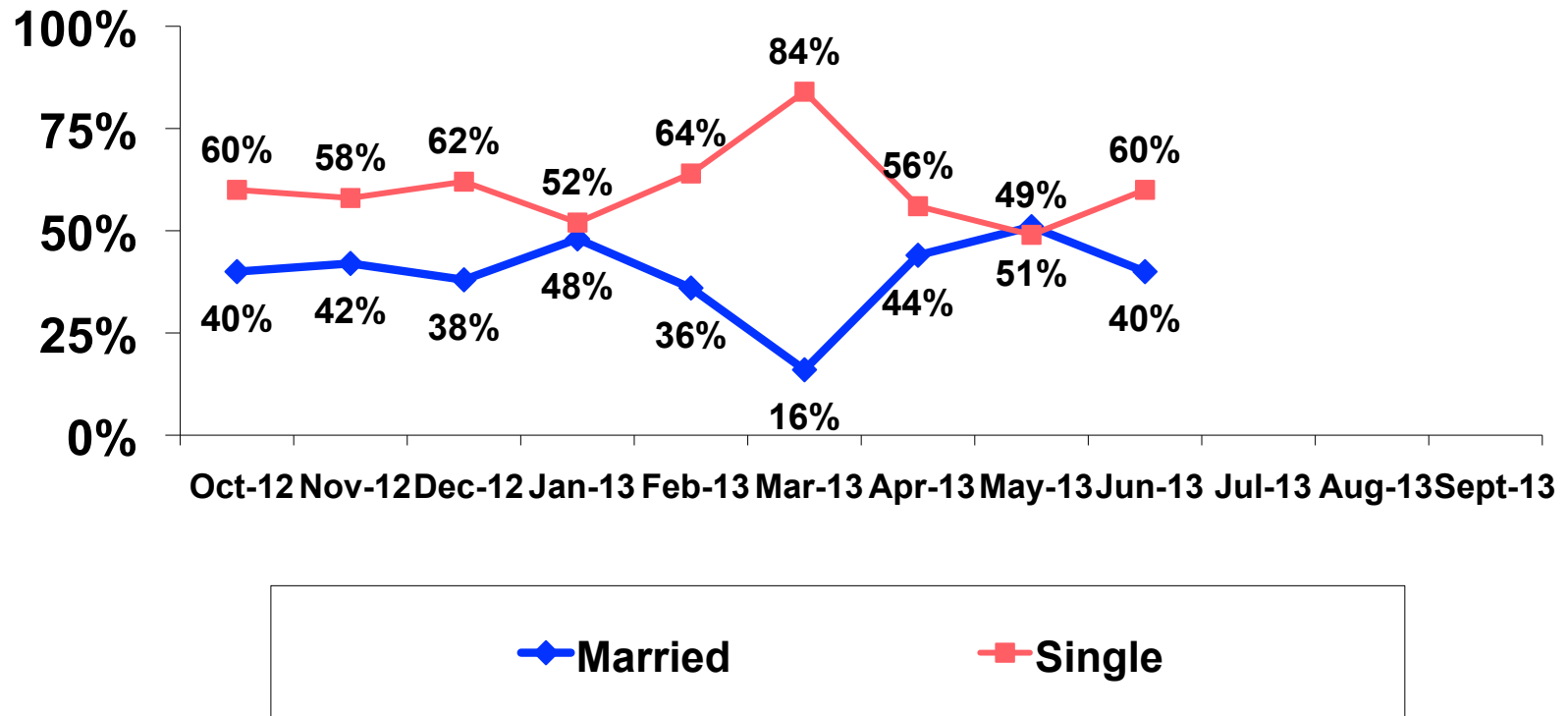
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

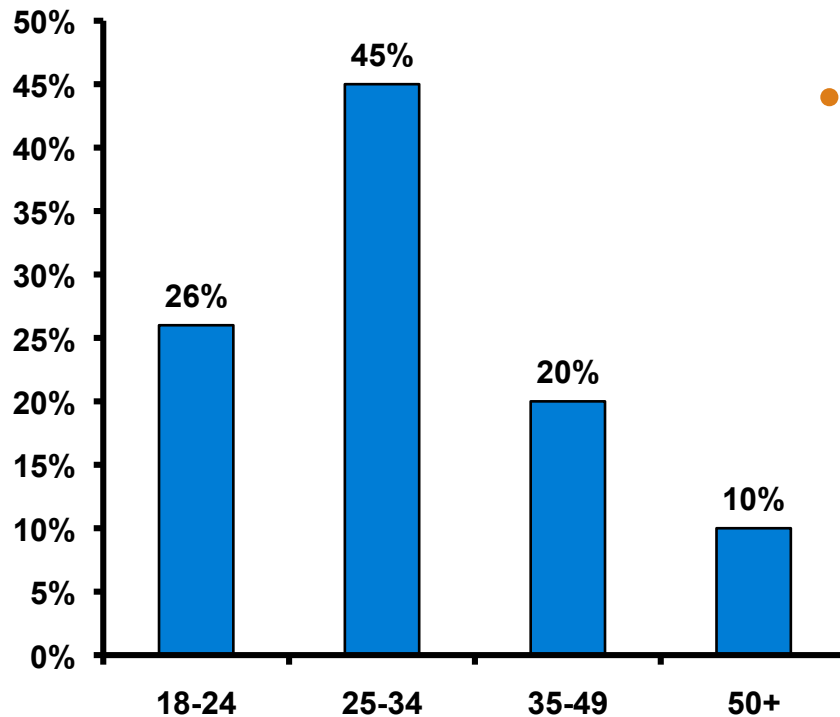


- 77% of female visitors are single.

Marital Status

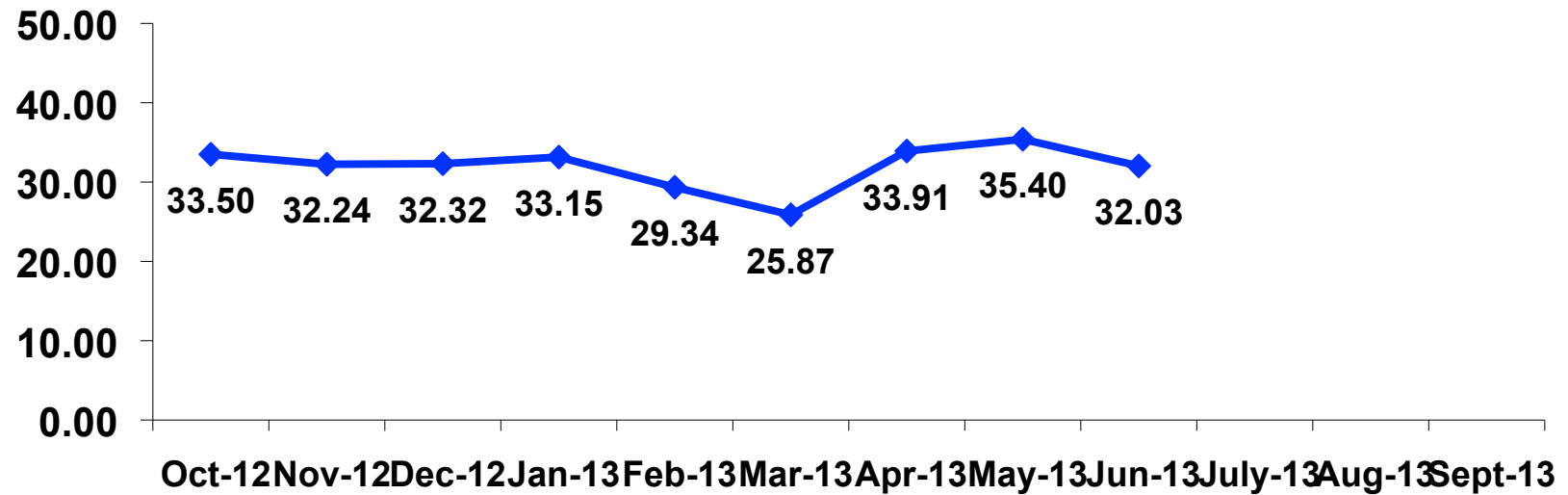


Age Overall

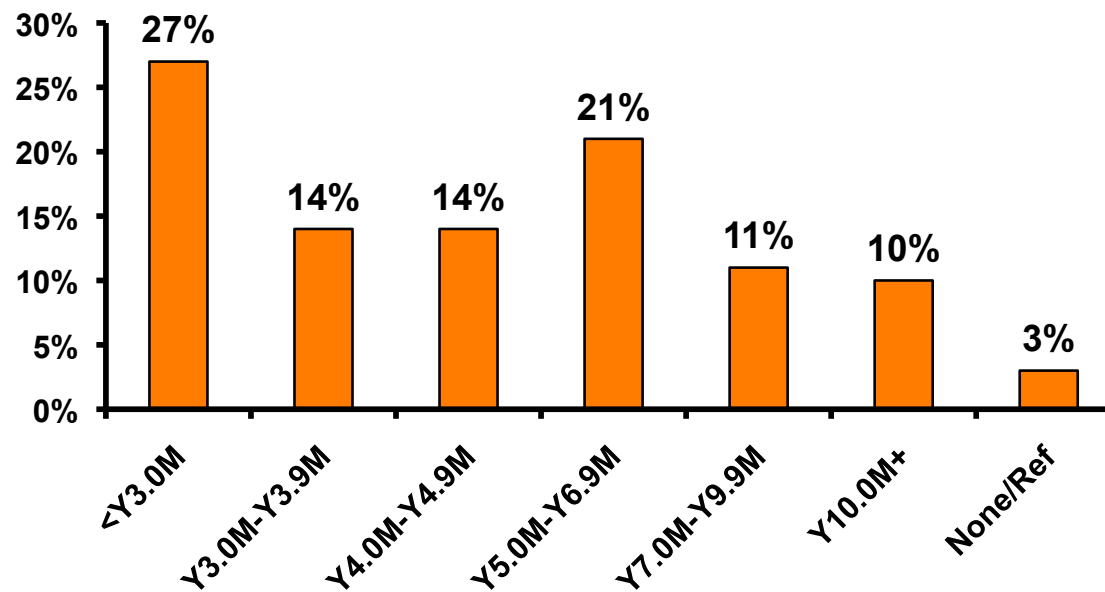


- The average age of the respondents is 32.03 years of age.

Average Age

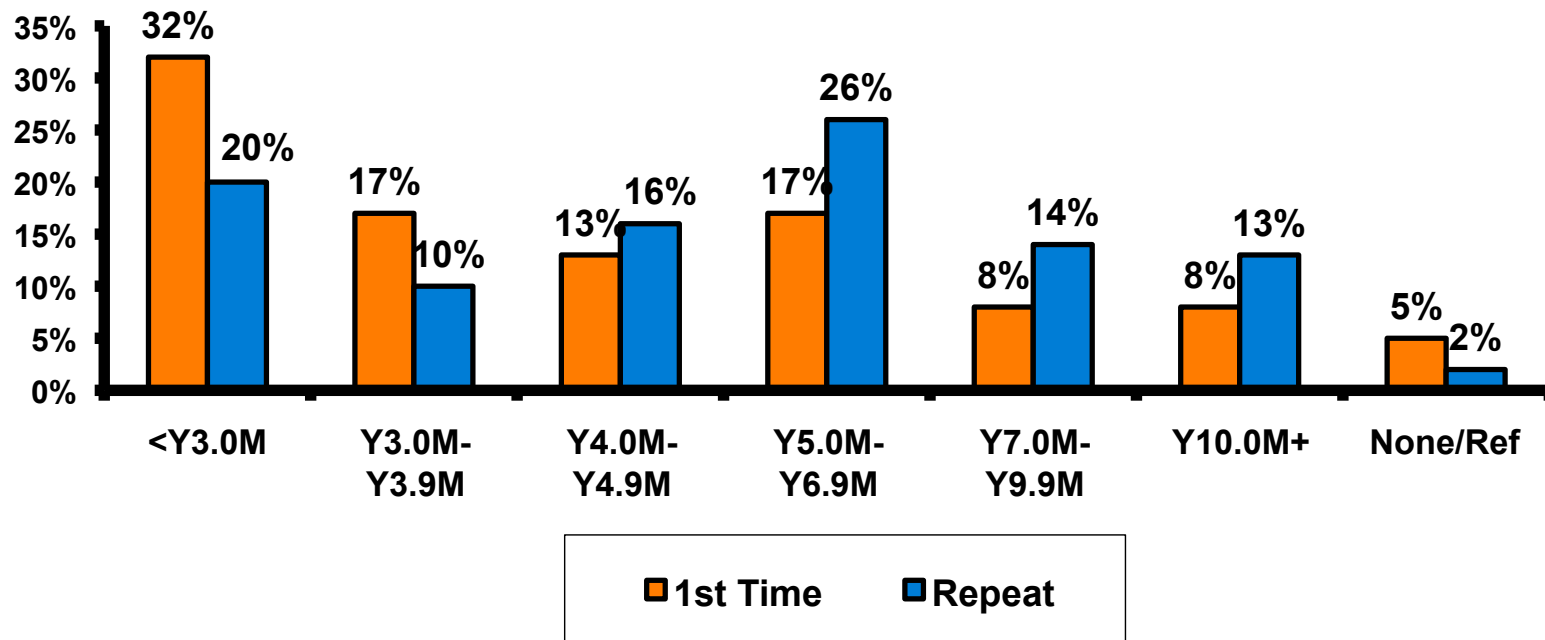


Personal Income



• ¥96.21=\$1

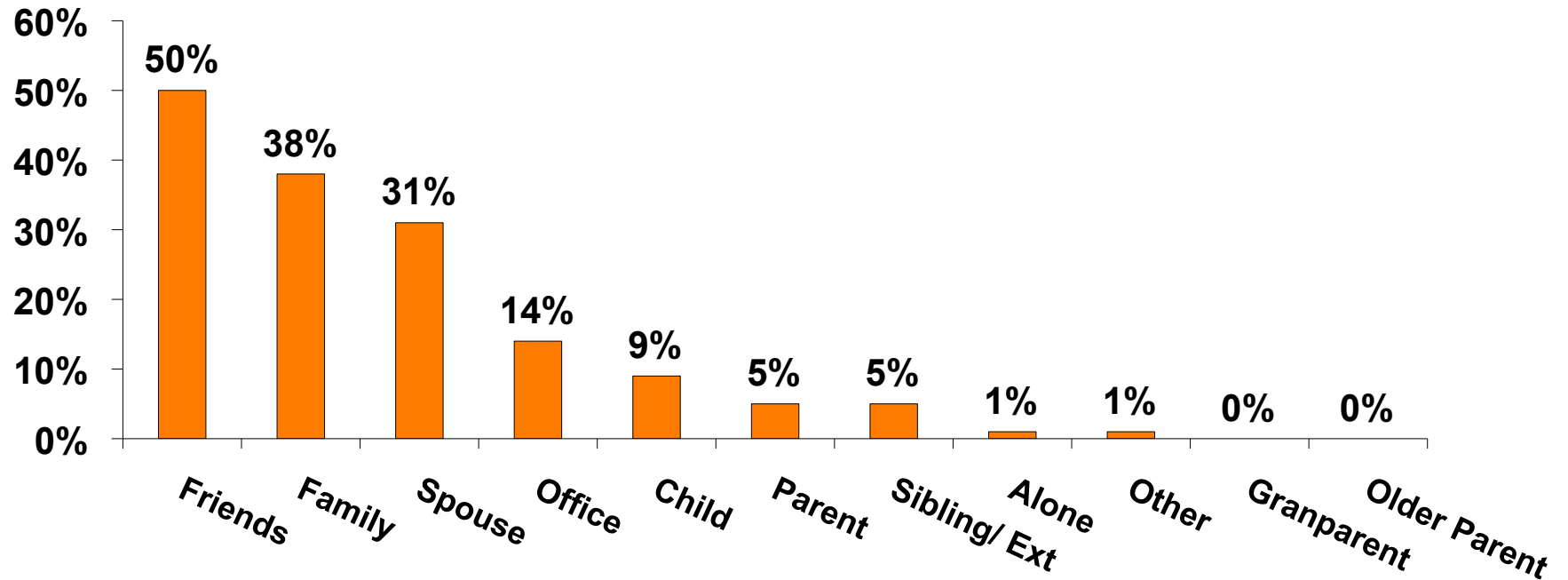
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	26	8	18	10	12	2	2
		Column N %	9%	5%	13%	14%	9%	3%	7%
	Y2.0M-Y3.0M	Count	53	22	31	20	22	8	3
		Column N %	18%	13%	23%	27%	17%	12%	11%
	Y3.0M-Y4.0M	Count	42	22	20	10	22	10	
		Column N %	14%	13%	15%	14%	17%	15%	
	Y4.0M-Y5.0M	Count	43	26	17	5	21	14	3
		Column N %	14%	16%	13%	7%	16%	21%	11%
	Y5.0M-Y7.0M	Count	63	42	21	9	31	15	8
		Column N %	21%	25%	16%	12%	23%	23%	29%
	Y7.0M-Y10.0M	Count	32	21	11	3	15	9	5
		Column N %	11%	13%	8%	4%	11%	14%	18%
	Y10.0M+	Count	31	19	12	10	7	7	7
		Column N %	10%	12%	9%	14%	5%	11%	25%
	No Income	Count	10	5	5	6	3	1	
		Column N %	3%	3%	4%	8%	2%	2%	
	Total	Count	300	165	135	73	133	66	28

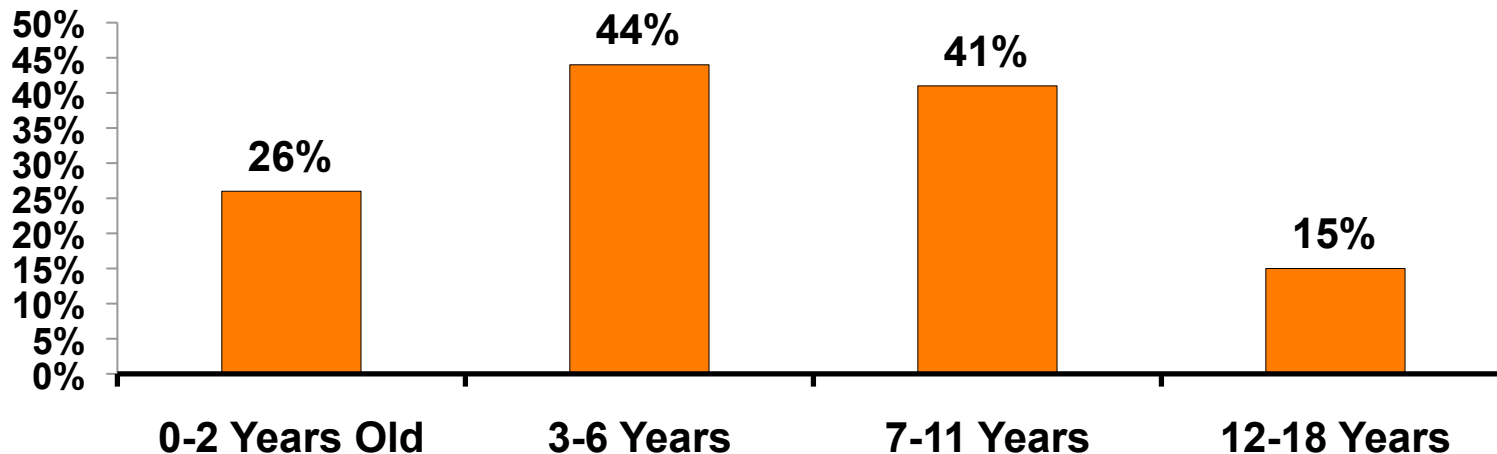
Travel Companions



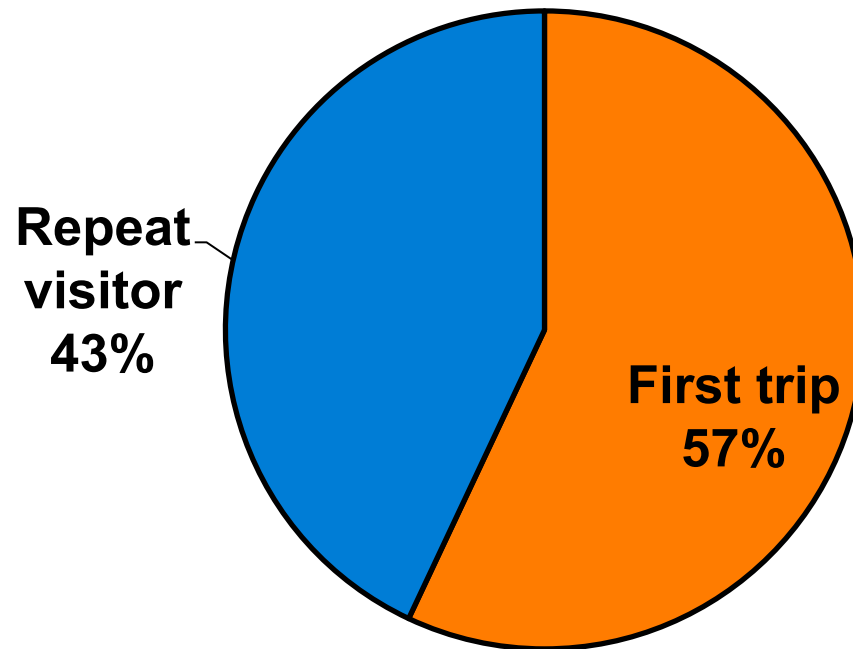
Number of Children Travel Party

N=27 total respondents traveling with children.

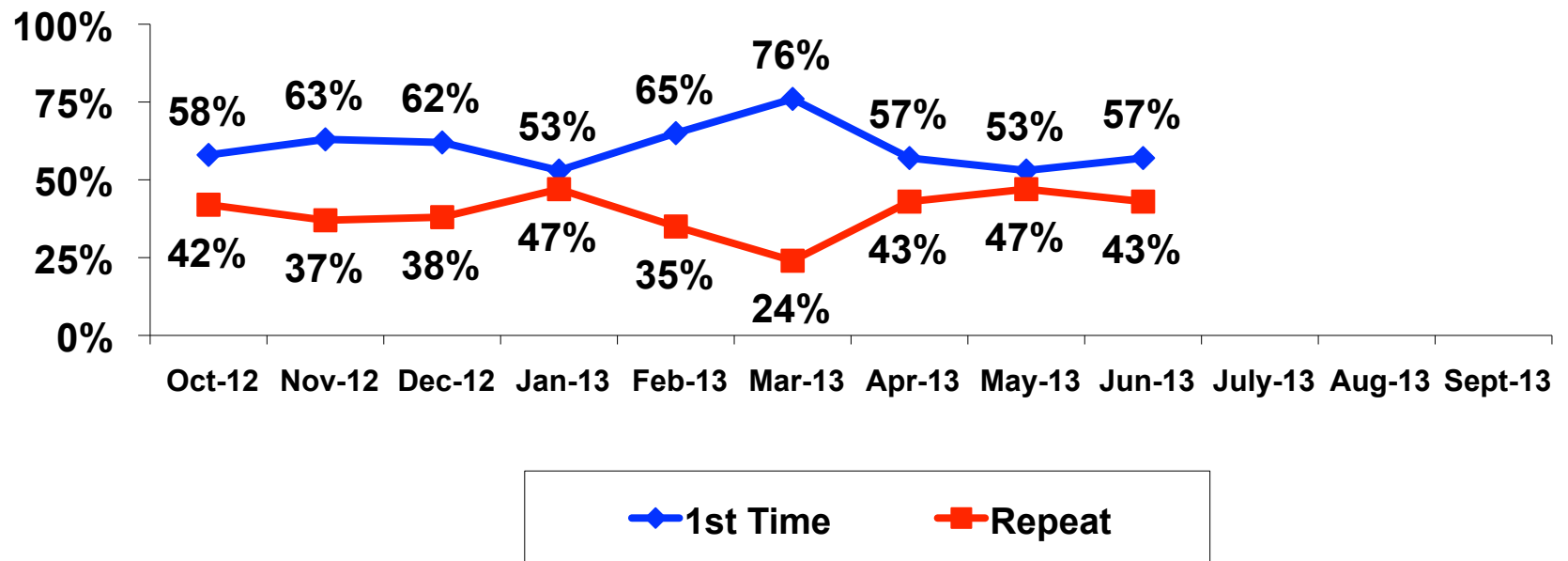
(Of those N=27 respondents, there is a total of 42 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



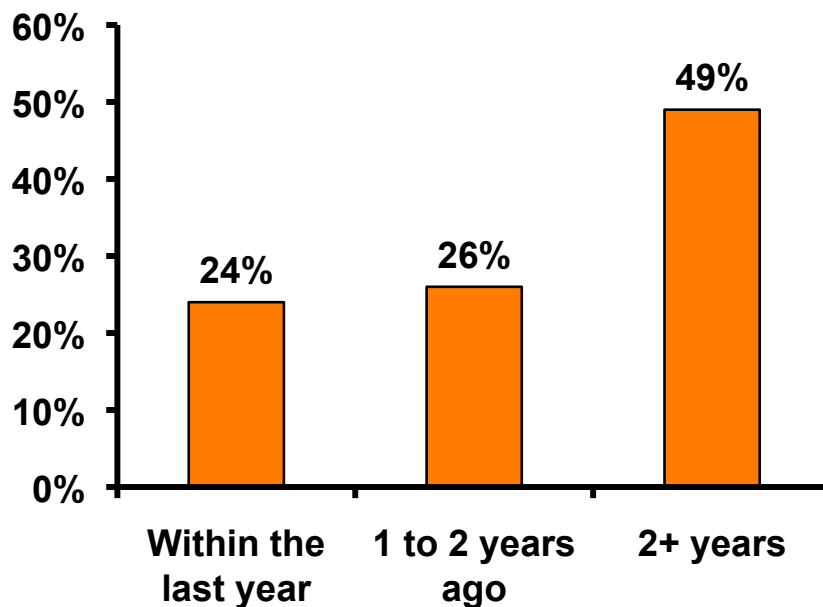
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	181	98	83
		Column N %	52%	49%	55%
	Female	Count	169	100	69
		Column N %	48%	51%	45%
	Total	Count	350	198	152
AGE	18-24	Count	89	67	22
		Column N %	26%	34%	15%
	25-34	Count	157	90	67
		Column N %	45%	45%	44%
	35-49	Count	69	27	42
		Column N %	20%	14%	28%
	50+	Count	34	14	20
		Column N %	10%	7%	13%
	Total	Count	349	198	151

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

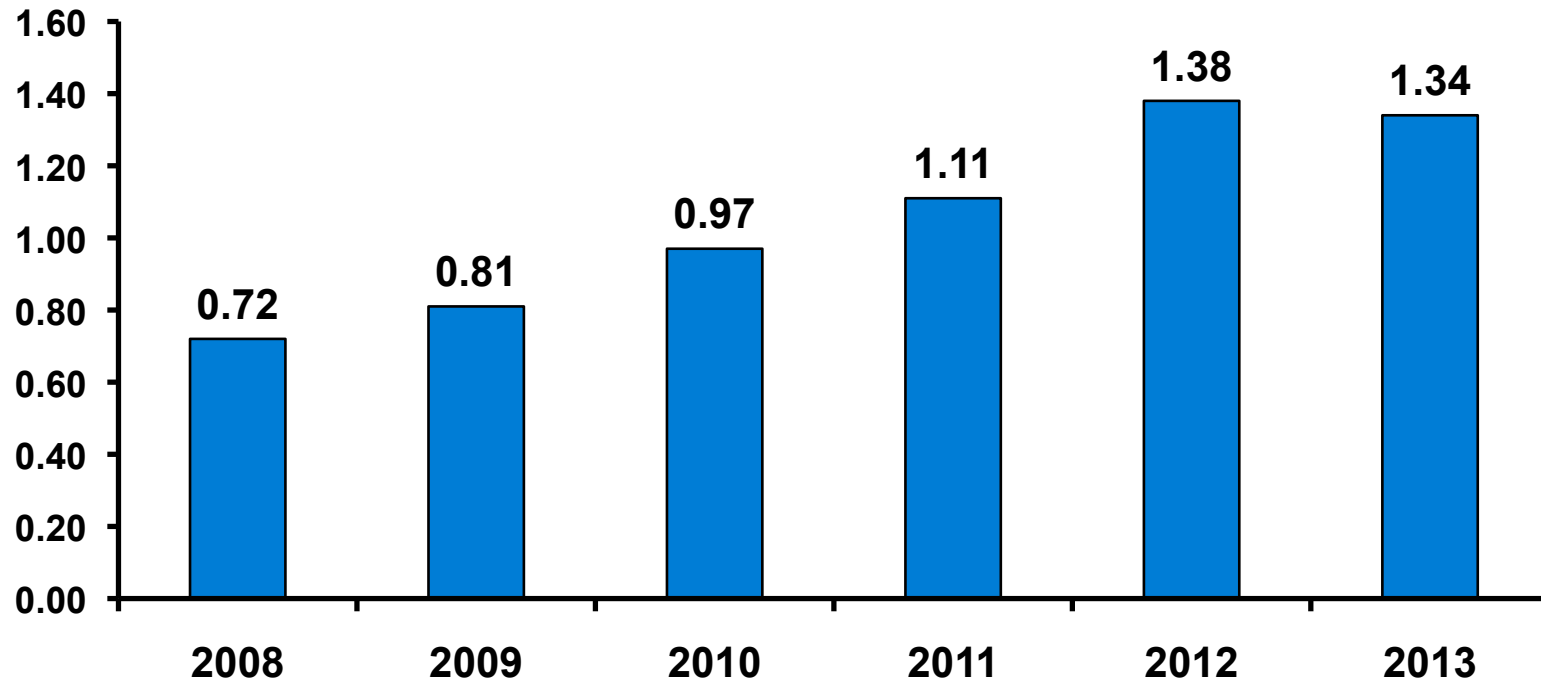
Repeat Visitors Last Trip

n = 148



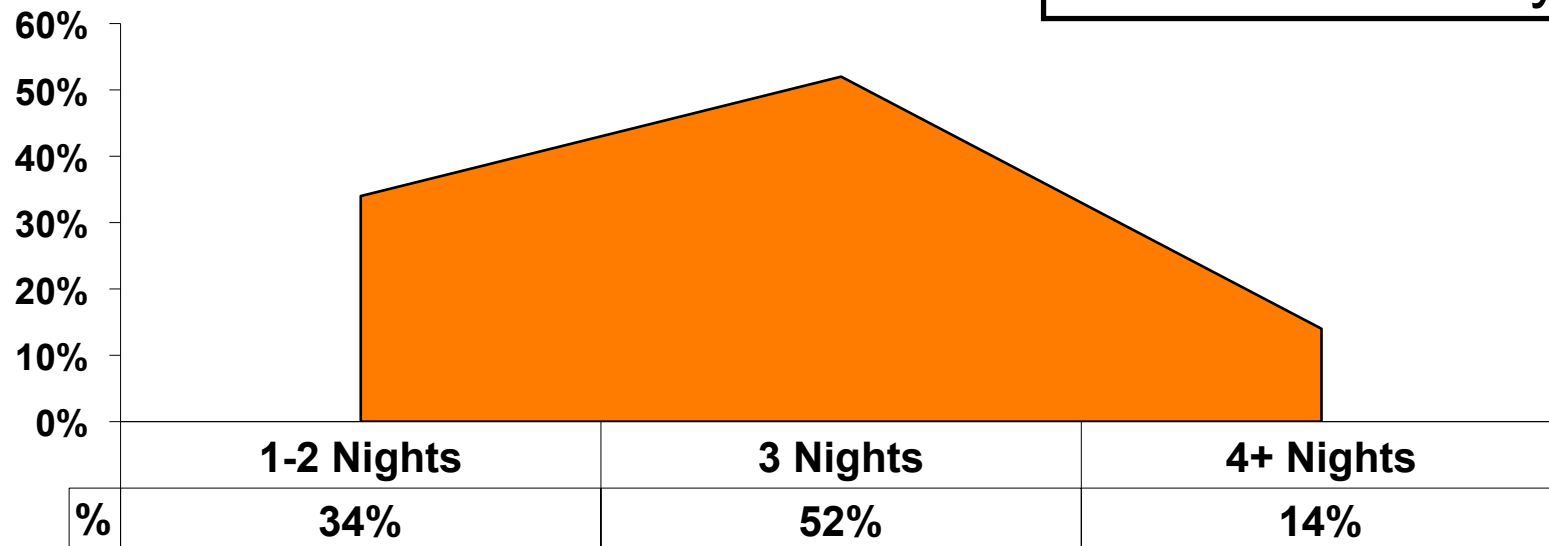
- The average repeat visitor has been to Guam 3.02 times.
- Less than half the repeat visitors have been to Guam within the last 2 years.

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

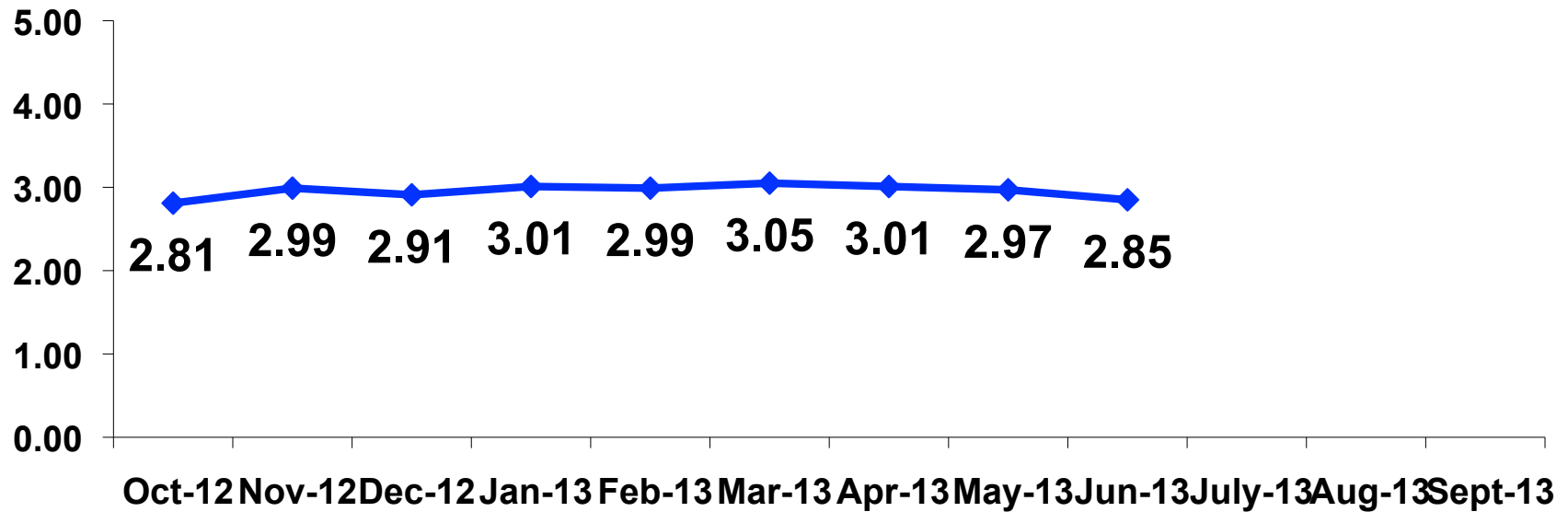


Length of Stay

Mean = 2.85 Days
Median = 3.0 Days



Average Length of Stay

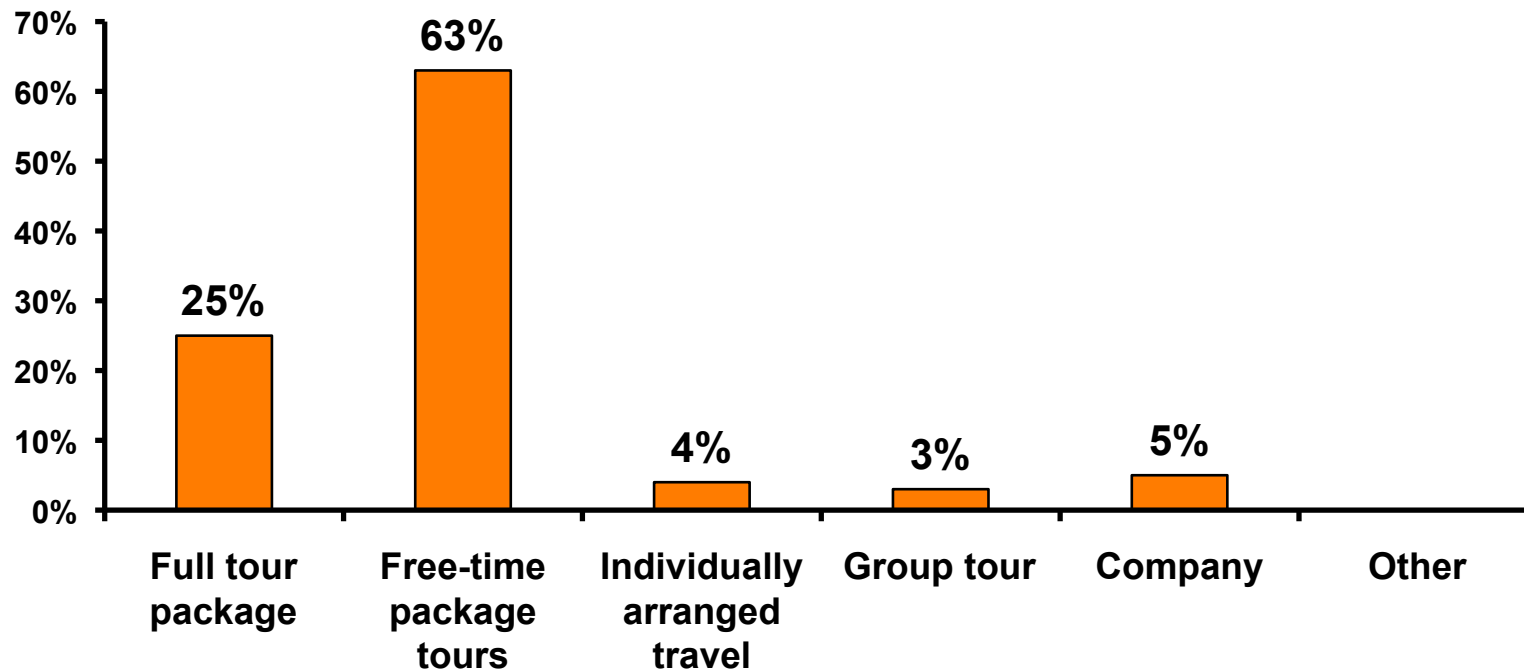


Occupation by Income

		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	Engineer	17%	12%	19%	26%	19%	21%	19%	13%		
	Office worker non-mgr	17%	19%	17%	19%	21%	19%	6%	16%		
	Salesperson	12%	4%	15%	10%	14%	14%	22%	13%		
	Self-employed	10%	8%	9%	2%	9%	6%	19%	23%		
	Skilled worker	8%	12%	11%	17%	5%	5%		3%		
	Freeter	8%	23%	9%	2%	5%	3%	6%	6%	10%	
	Student	6%	8%	8%	2%	2%	8%	6%		30%	
	Homemaker	5%	8%		7%	5%	5%	3%	3%	20%	
	Manager	4%			2%	5%	8%	6%	6%		
	Other	3%		6%	5%		5%	3%			
	Unemployed	3%	8%					3%	3%	40%	
	Govt- office worker non-mgr	3%			5%	12%	2%				
	Professional/ Specialist	2%				2%	2%	3%	10%		
	Executive (30+ employees)	1%		2%		2%	2%				
	Free-lancer	1%		2%	2%						
	Teacher	1%		2%				3%			
	Retired	0%							3%		
	Govt- Manager	0%					2%				
	Total	Count	340	26	53	42	43	63	32	31	10

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

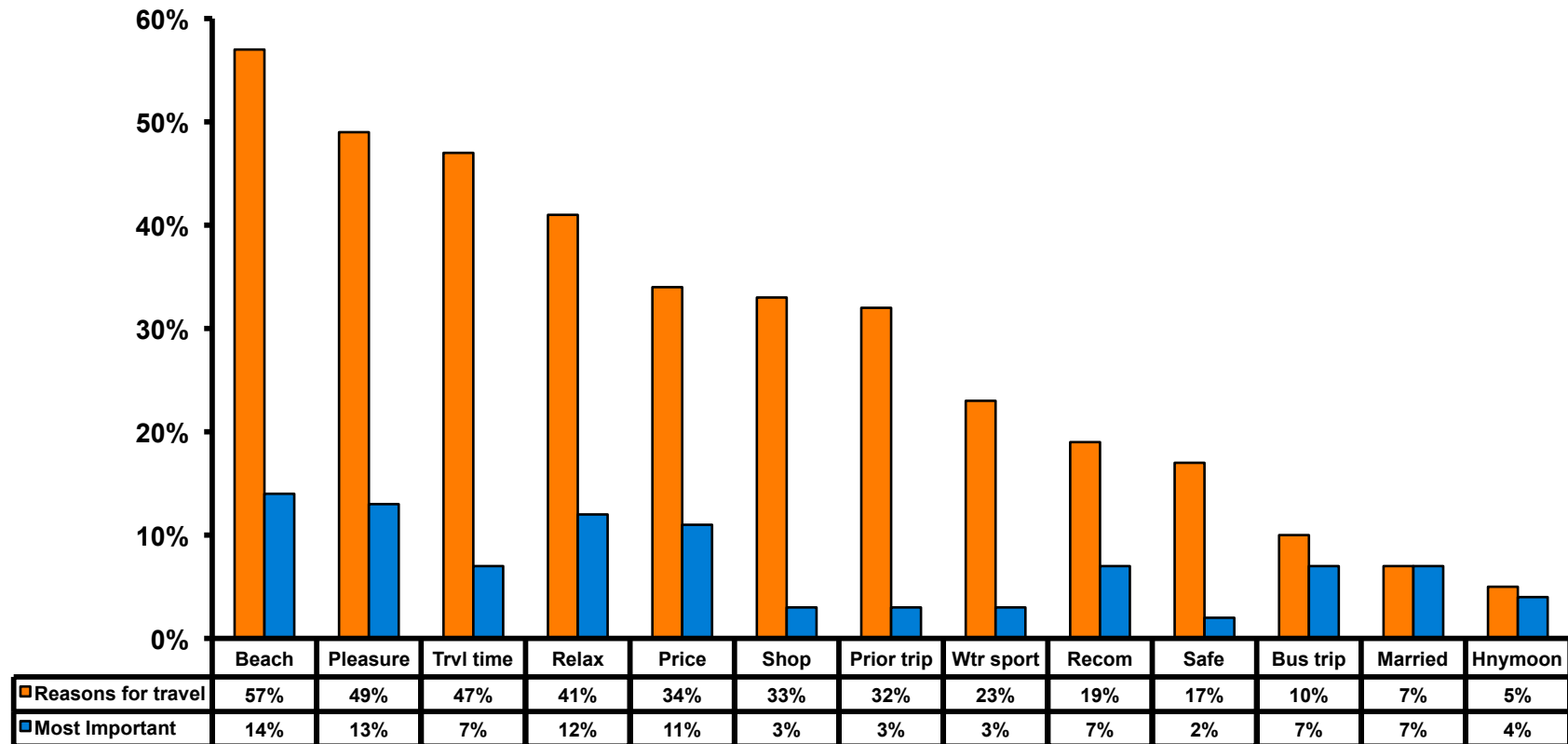


Accommodation by Income

Average length of stay: 2.85 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+
Q9 Pacific Bay Hotel	15%	15%	9%	17%	12%	13%	16%	16%	40%
Guam Plaza Hotel	15%	8%	13%	20%	21%	13%	13%	13%	10%
Guam Reef & Olive Spa	12%	23%	8%	17%	16%	11%	13%	6%	10%
Outrigger Guam Resort	8%	4%	11%	10%	7%	6%	16%	13%	
PIC Club	7%	8%	4%	5%	12%	14%		10%	
Grand Plaza Hotel	6%	4%	11%	5%	7%	5%	6%	6%	
Onward Beach Resort	6%		8%	5%	14%	8%	9%		
Hotel Santa Fe	4%	8%	6%		2%	3%	3%		20%
Hotel Nikko Guam	4%		4%	5%	2%	8%	3%	3%	
Oceanview Hotel	3%	12%	4%	2%		5%			
Holiday Resort Guam	3%	4%	6%	5%		3%	3%	3%	
Fiesta Resort Guam	3%	4%	6%			2%	6%	3%	
Sheraton Laguna Guam	2%		2%		5%		3%	10%	
Hilton Guam Resort	2%		6%		2%		3%	3%	
Bayview Hotel	2%	4%	2%					3%	10%
Westin Resort Guam	2%			5%		3%	3%		
Hyatt Regency Guam	1%	4%				3%		3%	
Guam Marriott Resort	1%	4%		2%				3%	
Tumon Bay Capital Hotel	1%		2%			2%		3%	
Leo Palace Resort	1%					2%	3%		
Royal Orchid Guam	1%			2%					
Other	0%								10%
Total Count	349	26	53	41	43	63	32	31	10

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure and
- Relaxation

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%	69%	55%	55%	38%	52%	62%	
	Pleasure	49%	58%	50%	52%	21%	42%	57%	
	Short travel time	47%	38%	50%	51%	47%	46%	48%	
	Relax	41%	43%	39%	45%	29%	39%	42%	
	Price	34%	31%	38%	33%	21%	30%	38%	
	Shopping	33%	31%	36%	25%	38%	25%	41%	
	Previous trip	32%	20%	31%	45%	35%	33%	30%	
	Water sports	23%	31%	26%	14%	3%	19%	27%	
	Recomm- friend/family/trvl agnt	19%	28%	20%	12%	12%	9%	30%	
	Safe	17%	12%	13%	25%	26%	19%	15%	
	Company/ Business Trip	10%	9%	9%	16%	6%	13%	7%	
	Married/ Attn wedding	7%		10%	7%	15%	9%	5%	
	Honeymoon	5%	2%	8%	3%		8%	1%	
	Scuba	5%	2%	4%	6%	12%	7%	2%	
	Other	4%	1%	4%	1%	12%	6%	2%	
	Golf	2%		1%	3%	6%	3%		
	Company Sponsored	1%		2%	3%		2%	1%	
	Visit friends/ Relatives	1%	1%	1%	1%		2%		
	Organized sports	1%		1%	1%		1%		
	Convention/ Trade/ Conference	1%			1%	3%	1%		
	Career Cert/ Testing	0%	1%					1%	
	Total	Count	350	89	157	69	34	181	169

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%	66%	57%	63%	51%	56%	65%	50%	
	Pleasure	49%	50%	55%	45%	60%	48%	66%	42%	40%	
	Short travel time	47%	38%	32%	43%	56%	59%	53%	48%	60%	
	Relax	41%	35%	43%	36%	42%	46%	53%	39%	40%	
	Price	34%	38%	36%	31%	40%	43%	25%	29%	40%	
	Shopping	33%	31%	36%	24%	40%	40%	25%	26%		
	Previous trip	32%	15%	28%	26%	37%	38%	41%	39%	20%	
	Water sports	23%	15%	30%	19%	19%	29%	9%	35%	30%	
	Recomm- friend/family/trvl agnt	19%	19%	40%	12%	9%	14%	9%	16%	40%	
	Safe	17%	12%	30%	10%	12%	17%	19%	26%		
	Company/ Business Trip	10%	15%	15%	17%	5%	6%	6%	13%		
	Married/ Attn wedding	7%	4%	4%	5%	9%	11%	6%	6%		
	Honeymoon	5%		4%	17%	5%	5%	3%			
	Scuba	5%	8%	2%	7%	5%	8%		6%		
	Other	4%	4%		5%	2%	2%	6%	6%	10%	
	Golf	2%		4%		2%	2%		6%		
	Company Sponsored	1%			5%	5%		3%			
	Visit friends/ Relatives	1%			5%			3%			
	Organized sports	1%		2%							
	Convention/ Trade/ Conference	1%					2%	3%			
	Career Cert/ Testing	0%									
	Total	Count	350	26	53	42	43	63	32	31	10

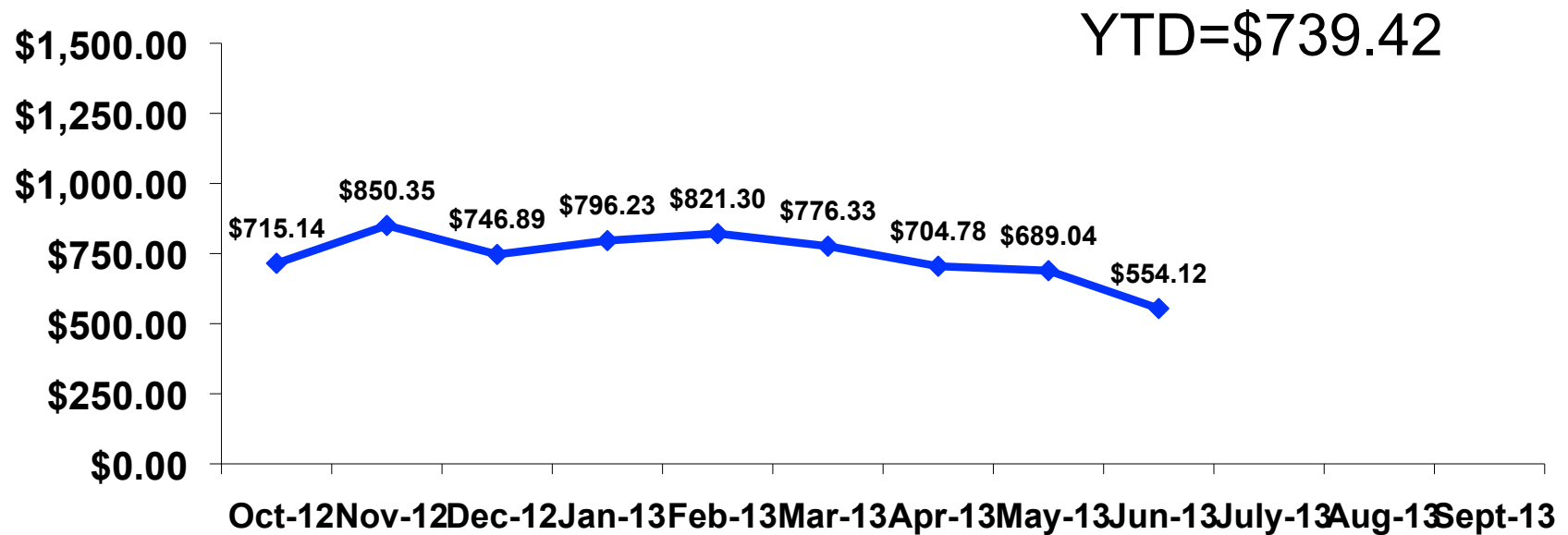
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥96.21/US\$1

- \$1,021.75 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$15,591 = maximum (highest amount recorded for the entire sample)
- \$554.12 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

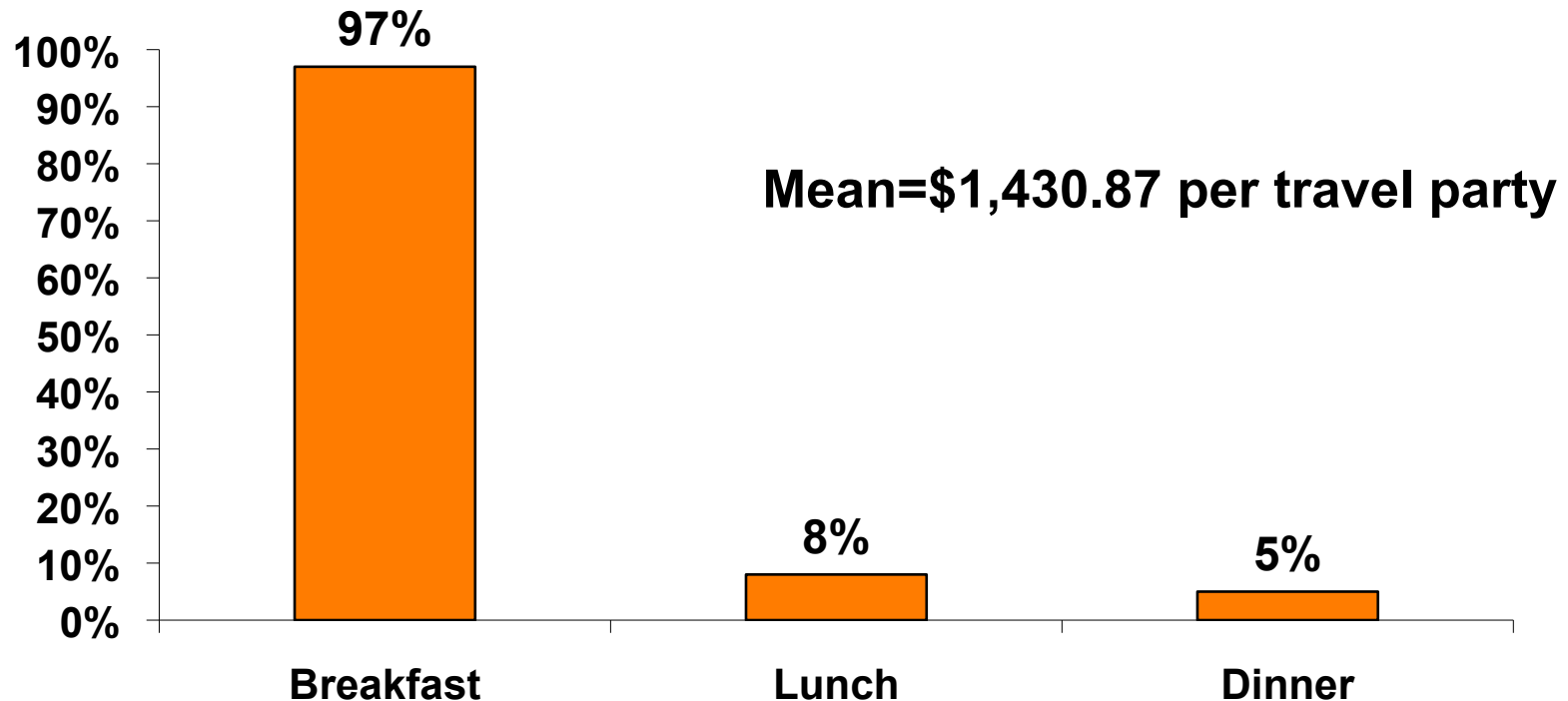
¥96.21=\$1

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

	MEAN \$
Air & Accommodation package only	\$1,019.95
Air & Accommodation w/ daily meal package	\$1,430.87
Air only	\$774.35
Accommodation only	\$620.17
Accommodation w/ daily meal only	\$51.97
Food & Beverages in Hotel	\$-
Ground transportation - Japan	\$46.34
Ground transportation - Guam	\$108.10
Optional tours/ activities	\$266.67
Other expenses	\$839.52
Total Prepaid	\$1,021.75

Prepaid Meal Breakdown

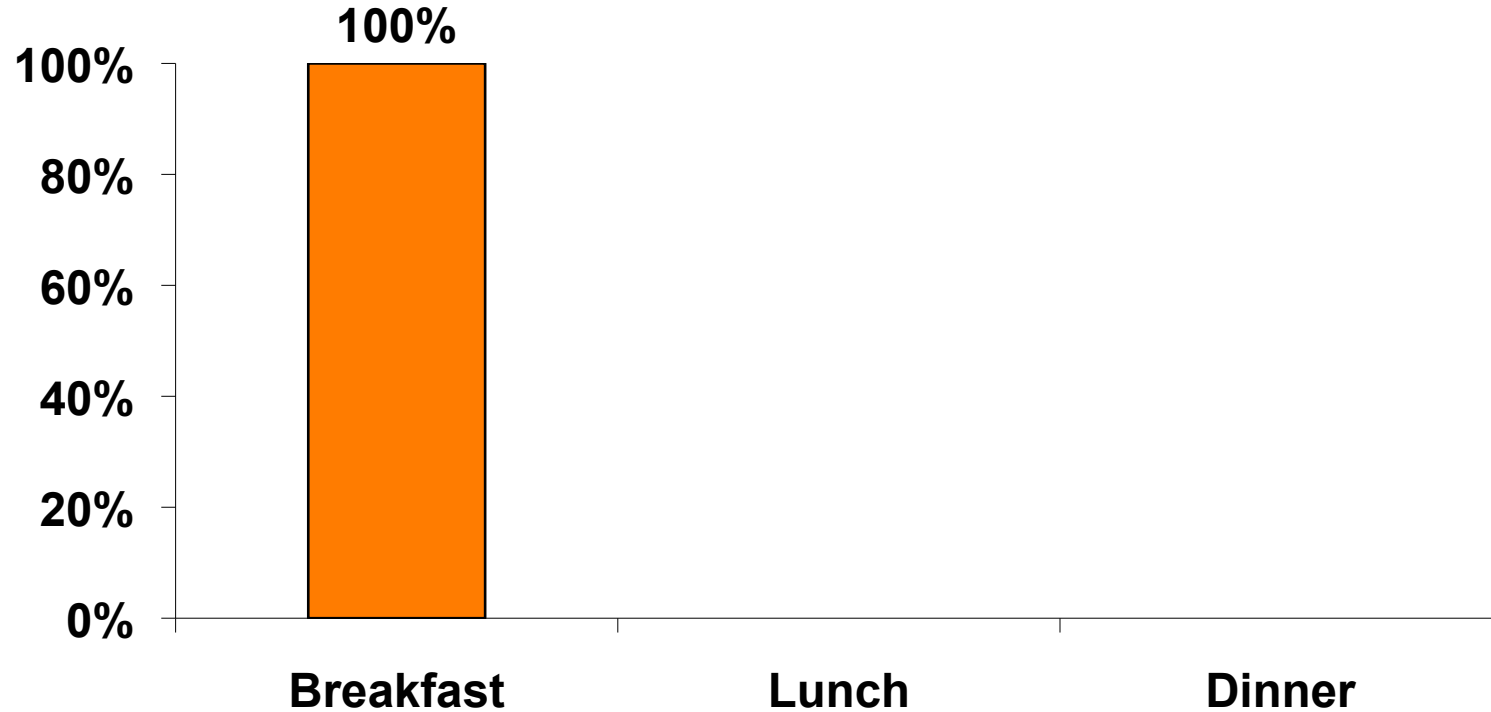
Air/ Accommodations with Daily Meal Package
n=75



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

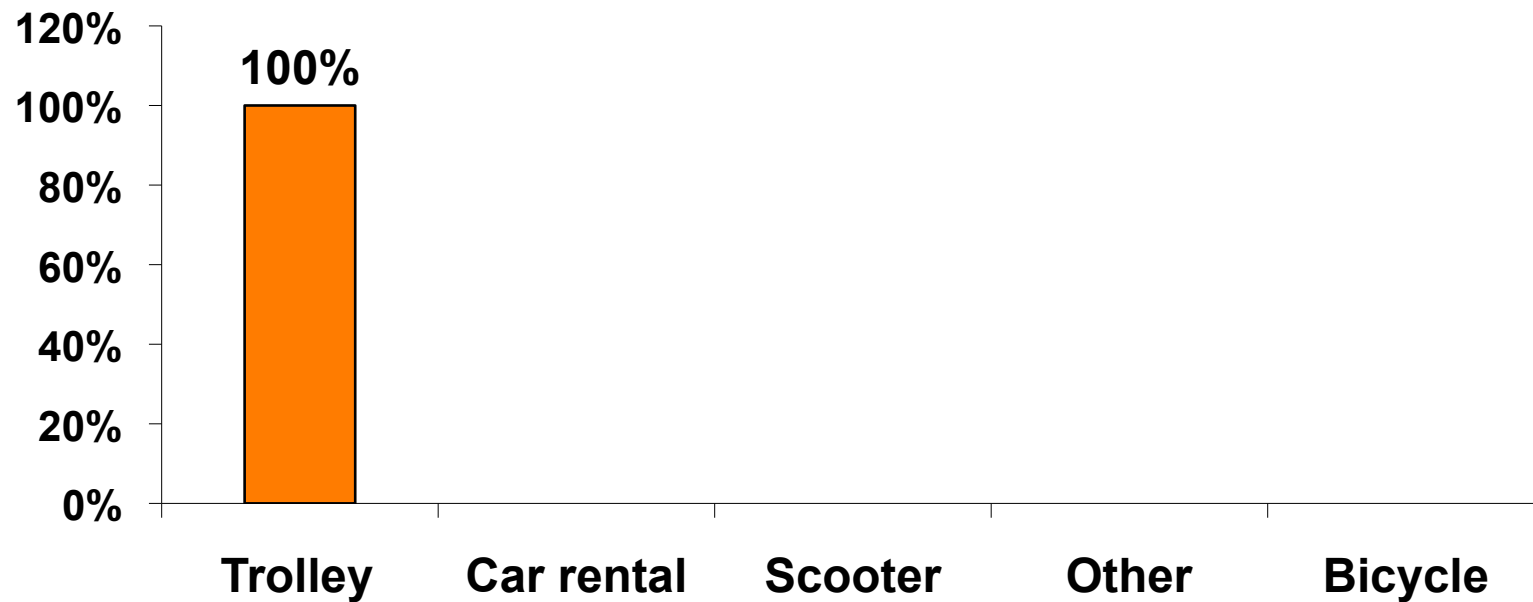
n=1



Mean=\$52.97 per travel party

Prepaid Ground Transportation

n=1

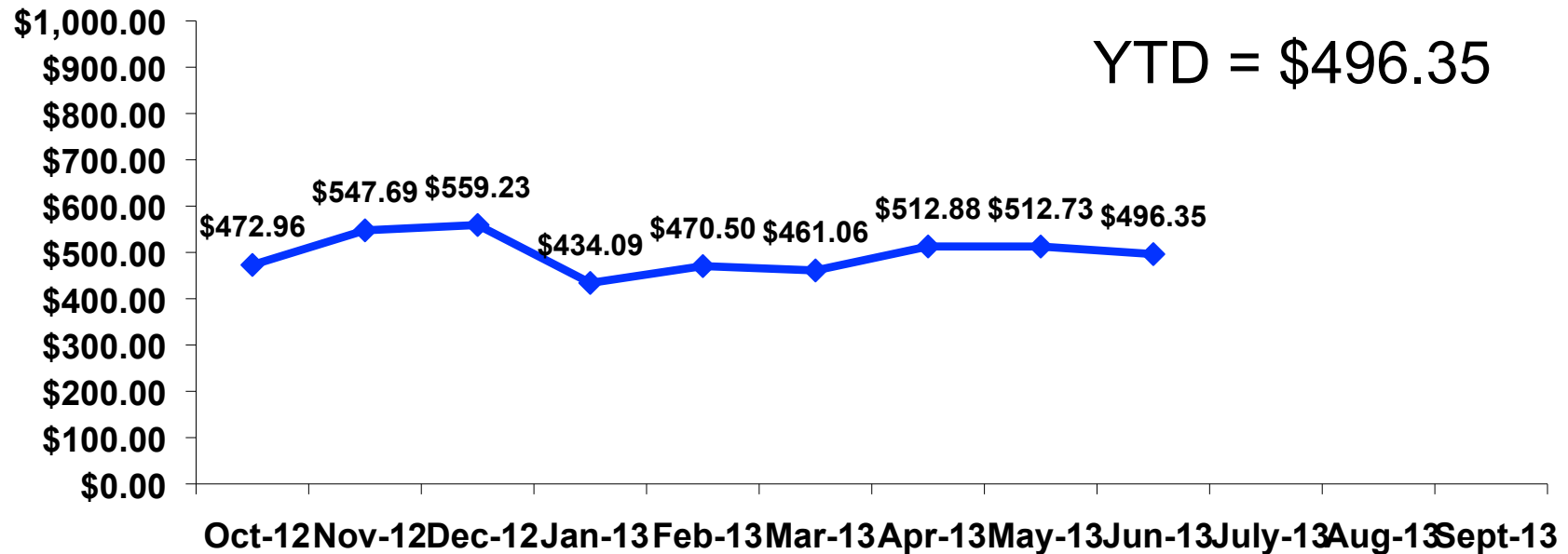


Mean=\$108.10 per travel party

On-Island Expenditures

- \$710.00 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,000 = Maximum (highest amount recorded for the entire sample)
- \$496.35 = overall mean average per person on-island expenditure

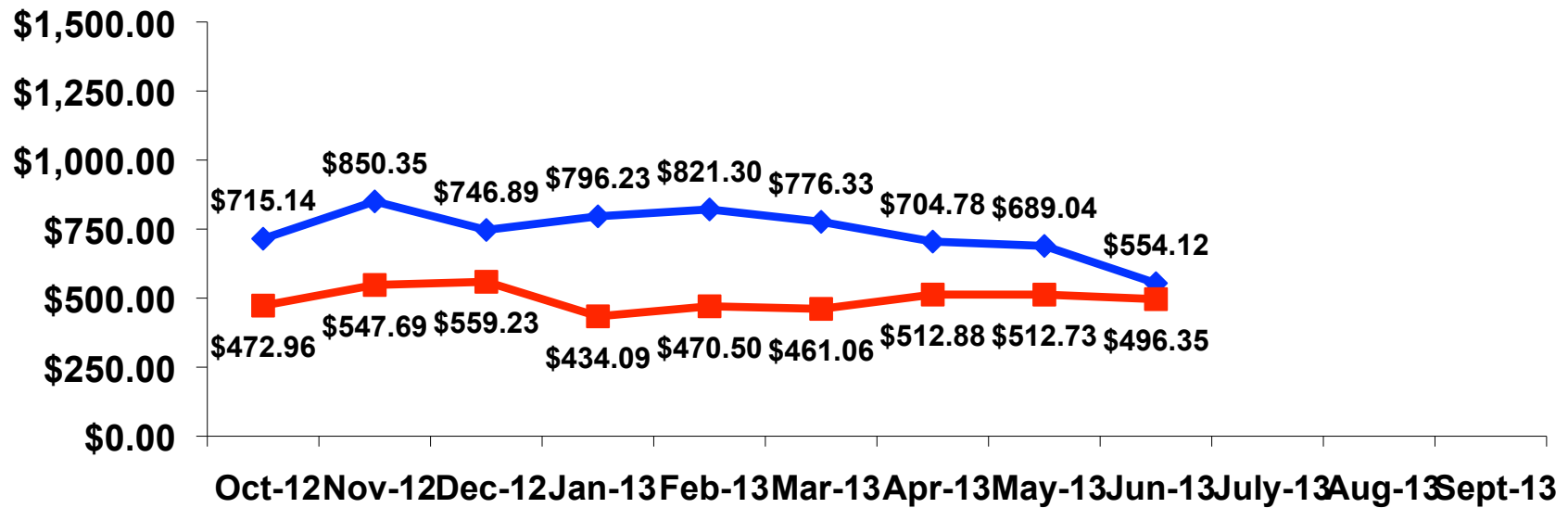
On-Island Expenditures Per Person



Prepaid/ On-Isle Expenditures Per Person

Prepaid YTD = \$739.42

On-Isle YTD = \$496.38



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	\$496.35	\$455.65	\$539.94	\$411.20	\$493.72	\$411.88	\$470.58	\$469.67	\$512.77	\$732.94	\$785.50
	Median	\$400	\$350	\$430	\$320	\$367	\$350	\$350	\$400	\$485	\$400	\$500
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$160	\$35
	Maximum	\$4,000	\$3,817	\$4,000	\$1,025	\$3,817	\$1,417	\$3,450	\$1,700	\$1,400	\$4,000	\$3,500

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$28.93	\$41.68	\$15.34	\$20.60	\$26.74	\$46.04	\$26.85
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$32.89	\$35.63	\$29.97	\$29.79	\$32.57	\$40.07	\$28.88
	Median	\$10	\$10	\$9	\$9	\$10	\$20	\$3
F&B RESTRNT	Mean	\$71.77	\$89.13	\$53.28	\$41.26	\$65.02	\$130.70	\$65.15
	Median	\$20	\$43	\$0	\$0	\$23	\$90	\$0
OPT TOUR	Mean	\$91.64	\$112.34	\$69.59	\$74.73	\$103.45	\$88.12	\$91.56
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$177.49	\$194.77	\$159.08	\$113.35	\$164.56	\$215.64	\$332.50
	Median	\$50	\$50	\$50	\$50	\$70	\$94	\$10
GIFT- OTHER	Mean	\$114.65	\$106.85	\$122.96	\$105.03	\$123.08	\$111.16	\$111.62
	Median	\$65	\$75	\$50	\$50	\$70	\$100	\$3
TRANS	Mean	\$21.12	\$24.18	\$17.86	\$11.28	\$18.97	\$39.83	\$19.38
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$175.82	\$144.53	\$209.15	\$183.97	\$128.80	\$240.78	\$234.76
	Median	\$0	\$0	\$14	\$0	\$0	\$0	\$30
TOTAL	Mean	\$710.00	\$740.09	\$677.77	\$579.26	\$653.42	\$913.68	\$912.18
	Median	\$500	\$600	\$500	\$410	\$500	\$700	\$624

On-Island Expenditures

First Timers & Repeaters

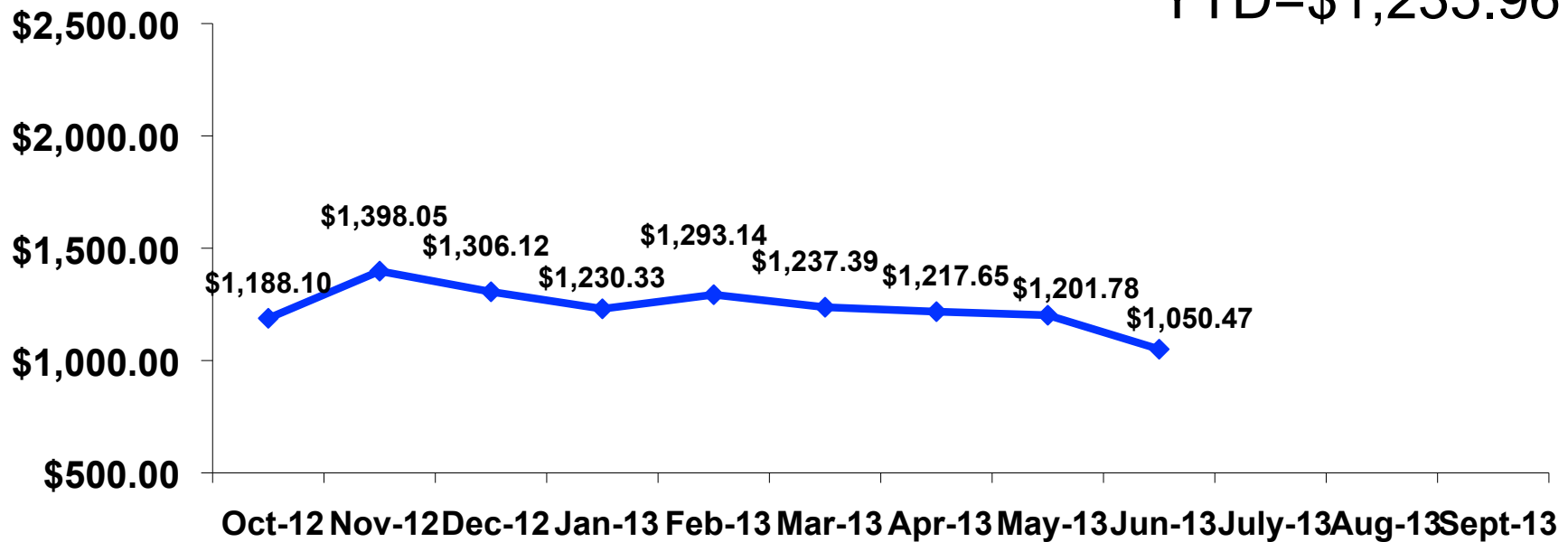
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$28.93	\$24.55	\$34.60
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$32.89	\$30.07	\$36.55
	Median	\$10	\$7	\$16
F&B RESTRNT	Mean	\$71.77	\$60.75	\$86.05
	Median	\$20	\$0	\$40
OPT TOUR	Mean	\$91.64	\$86.86	\$97.83
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$177.49	\$133.07	\$235.07
	Median	\$50	\$48	\$100
GIFT- OTHER	Mean	\$114.65	\$119.36	\$108.55
	Median	\$65	\$70	\$53
TRANS	Mean	\$21.12	\$23.79	\$17.66
	Median	\$0	\$0	\$0
OTHER	Mean	\$175.82	\$166.23	\$188.26
	Median	\$0	\$0	\$0
TOTAL	Mean	\$710.00	\$636.67	\$805.52
	Median	\$500	\$495	\$600

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,050.47 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,573 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

YTD=\$1,235.96



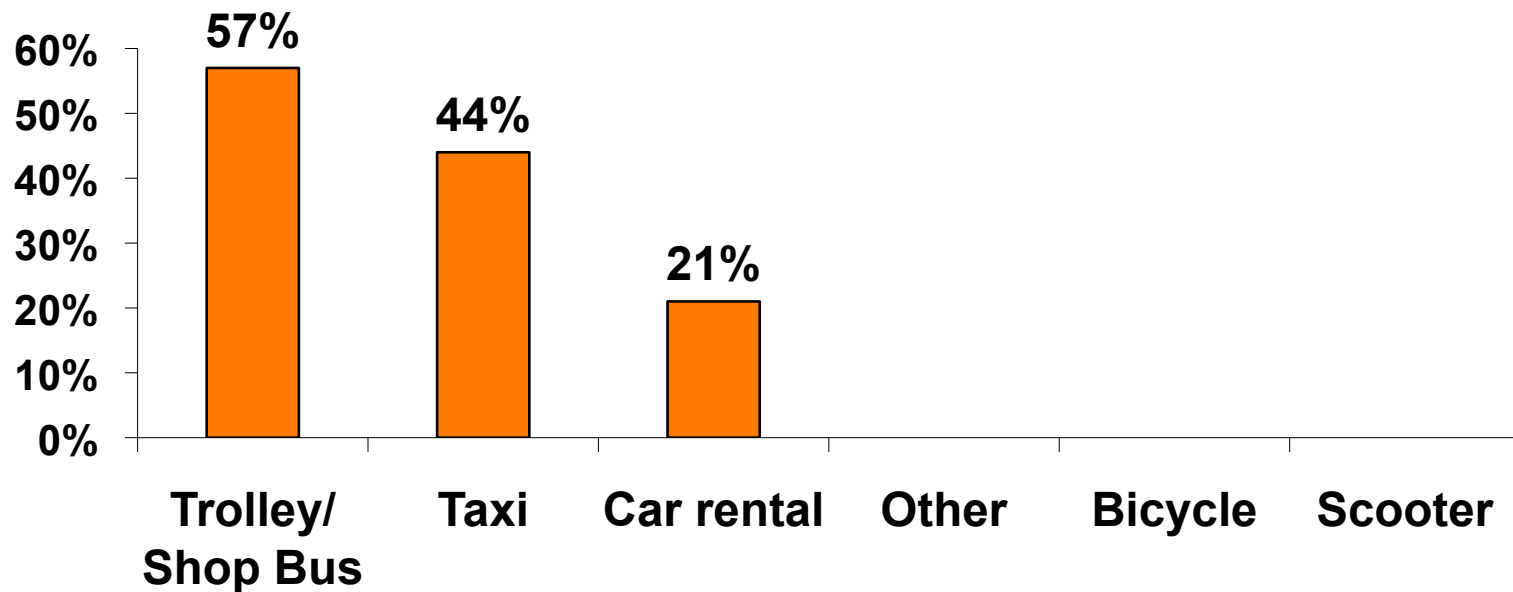
Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$28.93
Food & beverage in fast food restaurant/ convenience store	\$32.89
Food & beverage at restaurants or drinking establishments outside a hotel	\$71.77
Optional tours and activities	\$91.64
Gifts/ souvenirs for yourself/companions	\$177.49
Gifts/ souvenirs for friends/family at home	\$114.65
Local transportation	\$21.12
Other expenses not covered	\$175.82
Average Total	\$710.00

Local Transportation

n=84

Mean=\$21.12 per travel party



Guam Airport Expenditures

- \$24.85 = Mean
- \$5 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

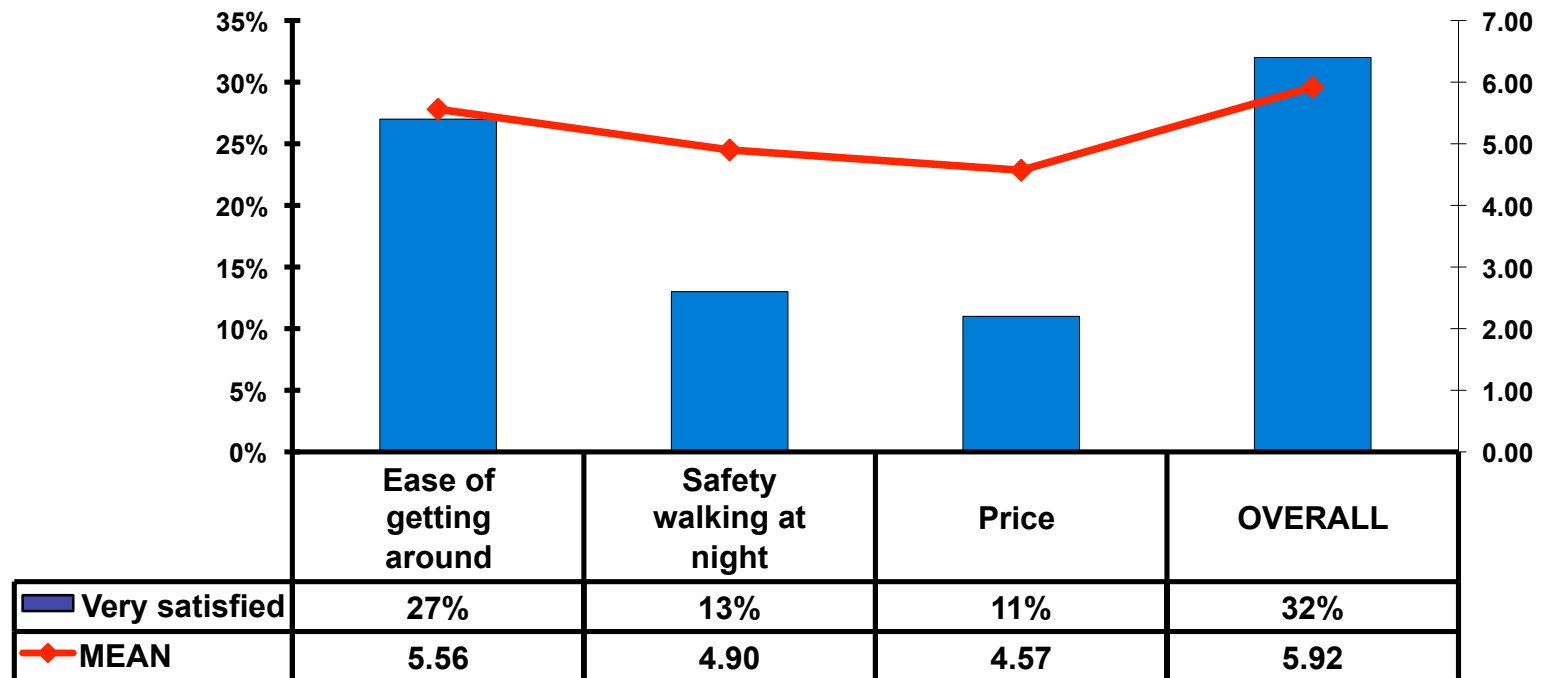
	MEAN \$
Food & Beverages	\$6.29
Gifts/Souvenirs Self	\$8.72
Gifts/Souvenirs Others	\$9.84
Total	\$24.85

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

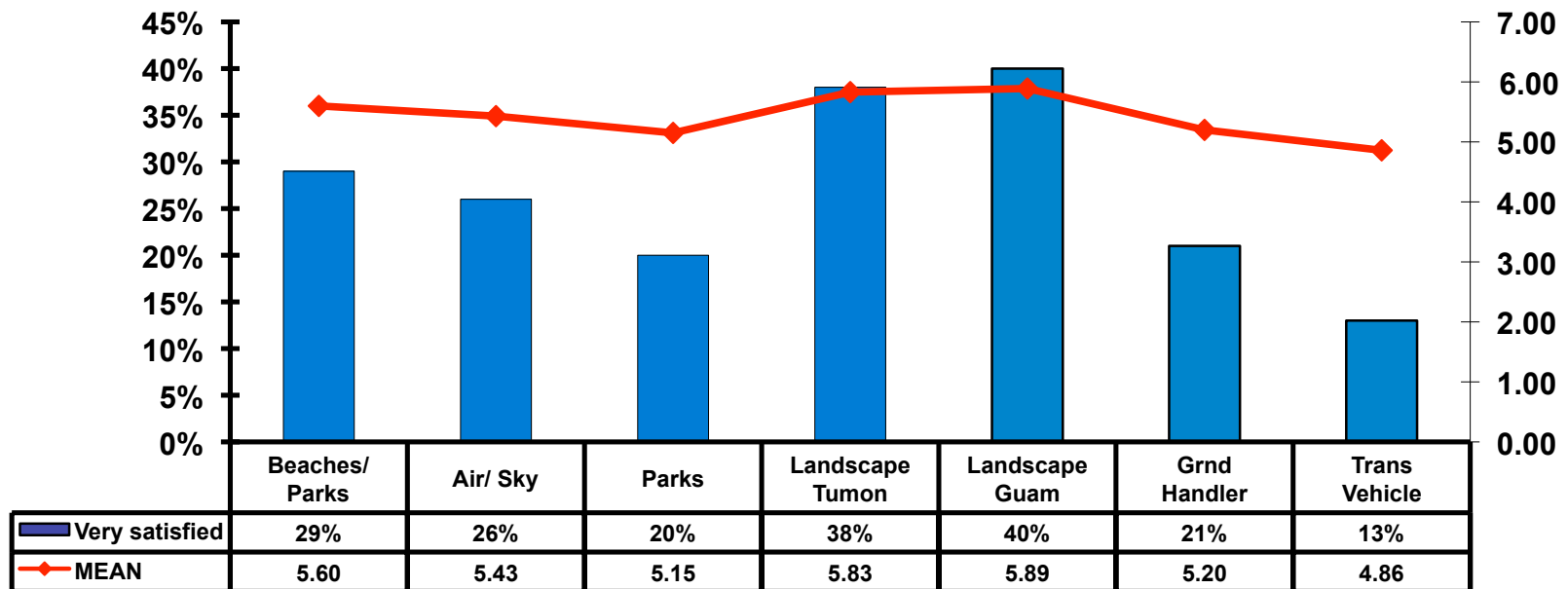
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

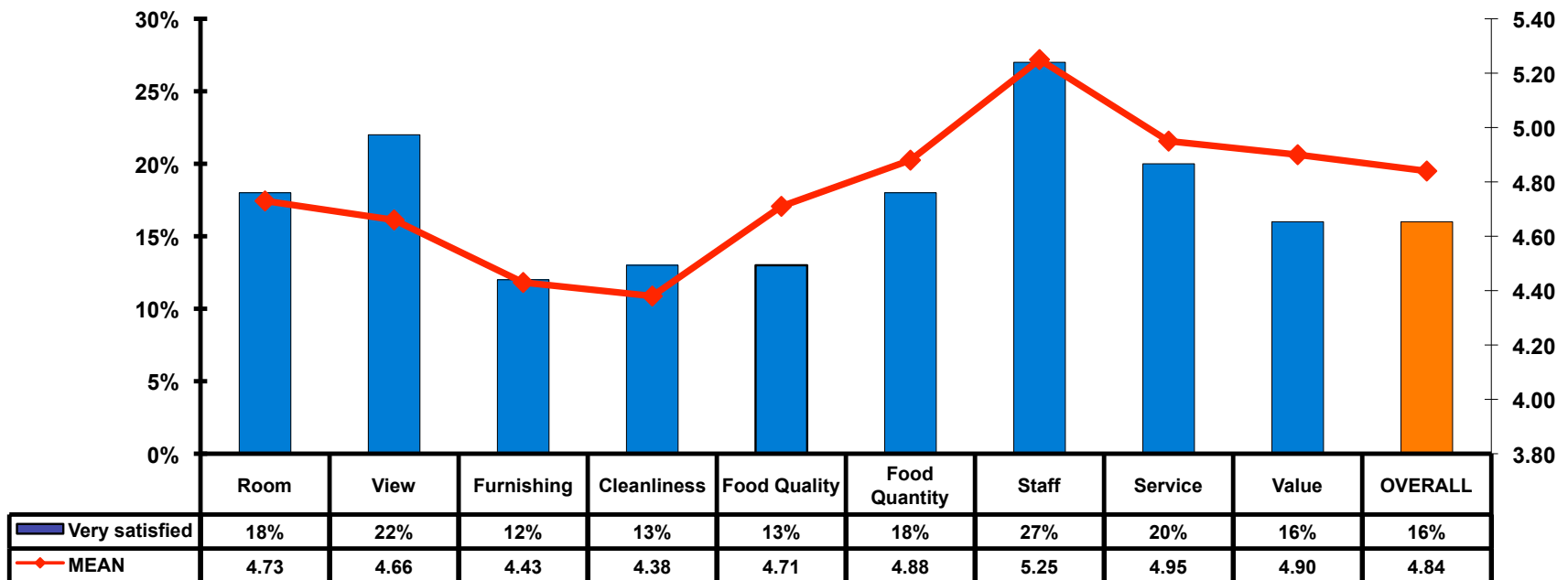
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

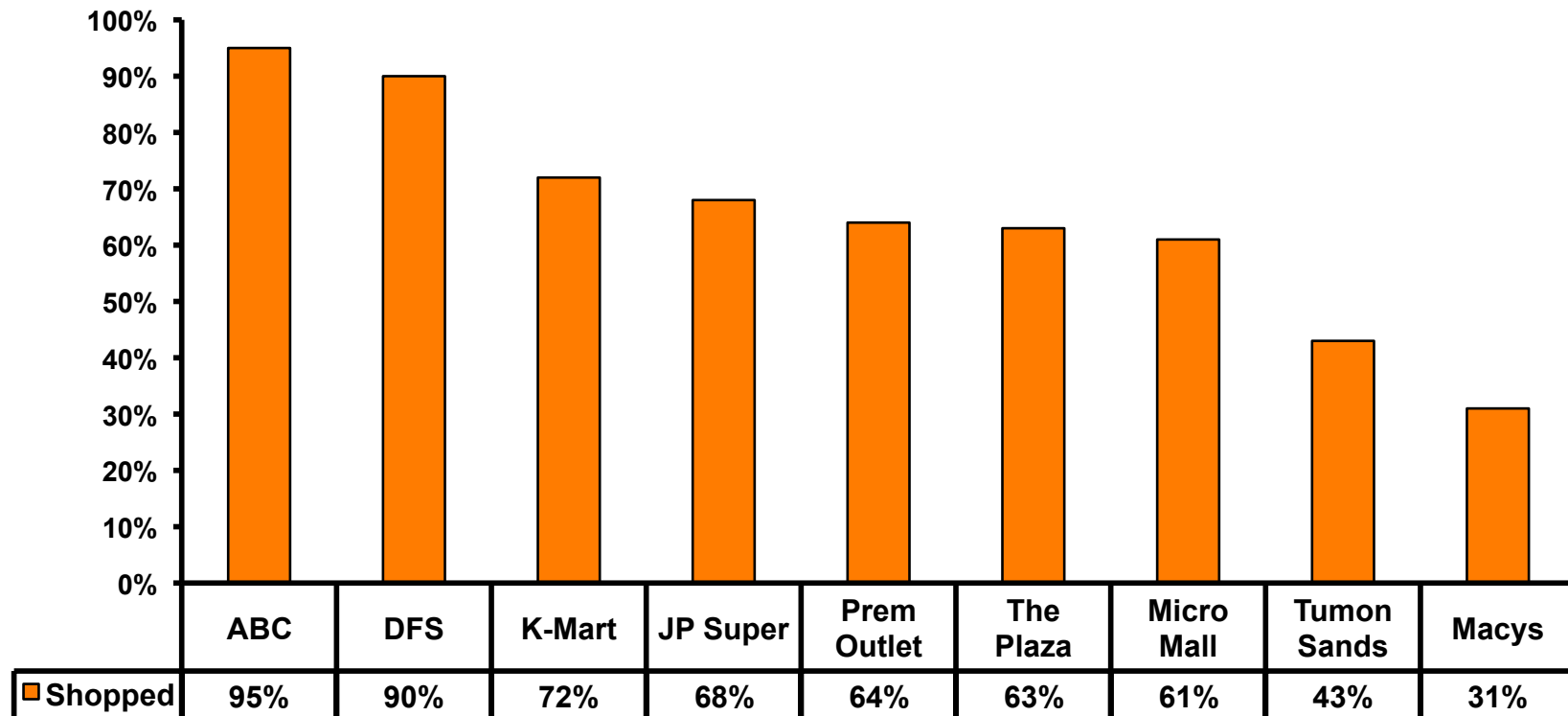
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

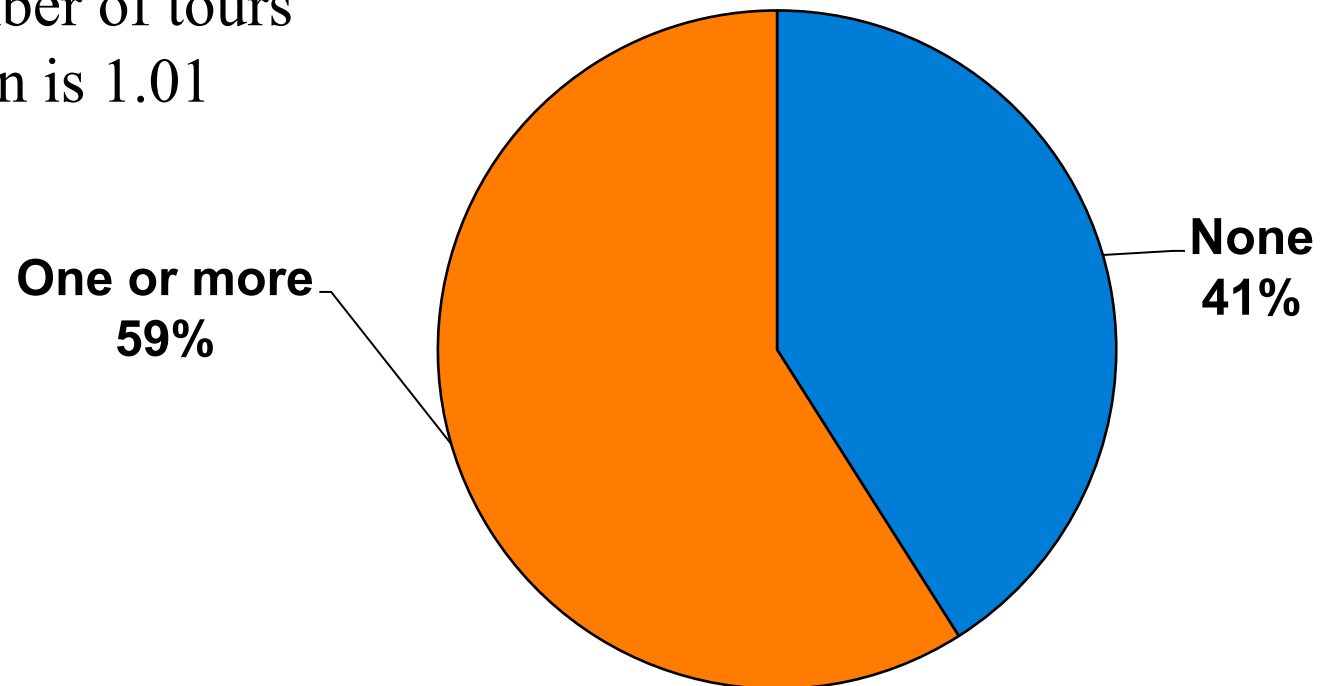
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

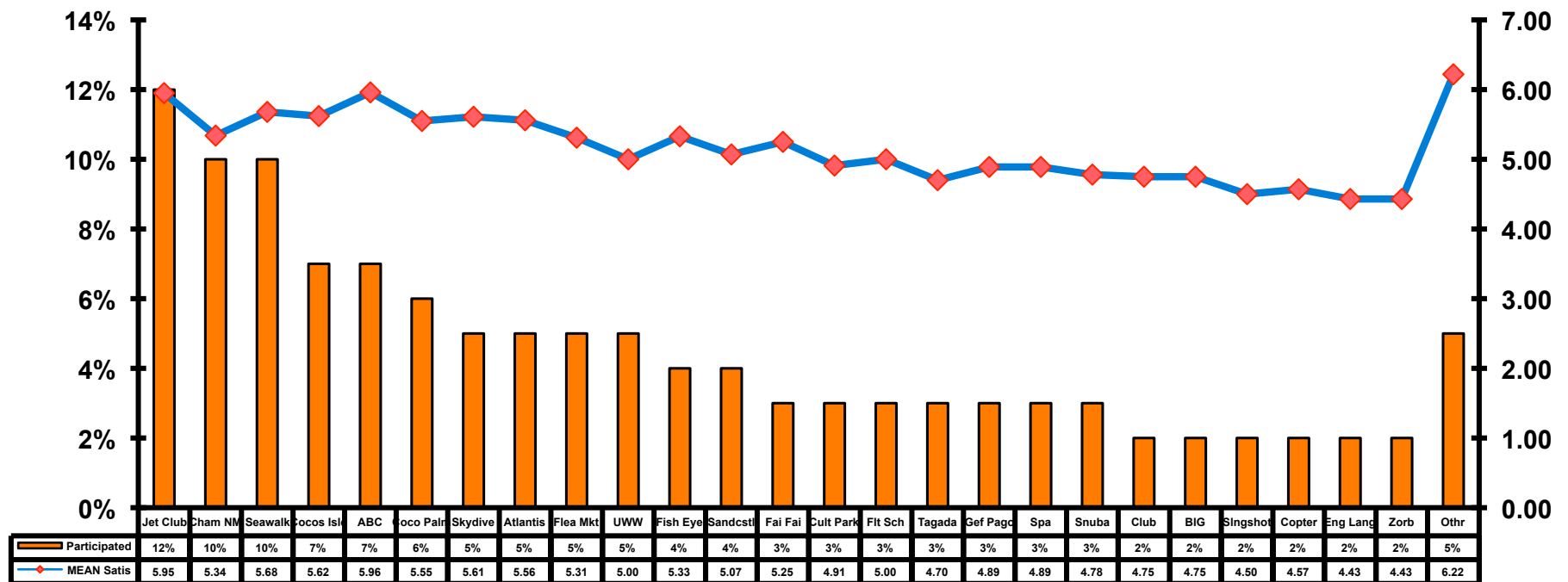
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 55%	Score of 6 to 7 = 51%
Score of 4 to 5 = 40%	Score of 4 to 5 = 41%
Score 1 to 3 = 4%	Score 1 to 3 = 8%
MEAN = 5.46	MEAN = 5.33

Optional Tour Participation

- Average number of tours participated in is 1.01



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 = 56%	Score of 6 to 7 = 53%
Score of 4 to 5 = 41%	Score of 4 to 5 = 42%
Score 1 to 3 = 3%	Score 1 to 3 = 3%
MEAN = 5.48	MEAN = 5.36

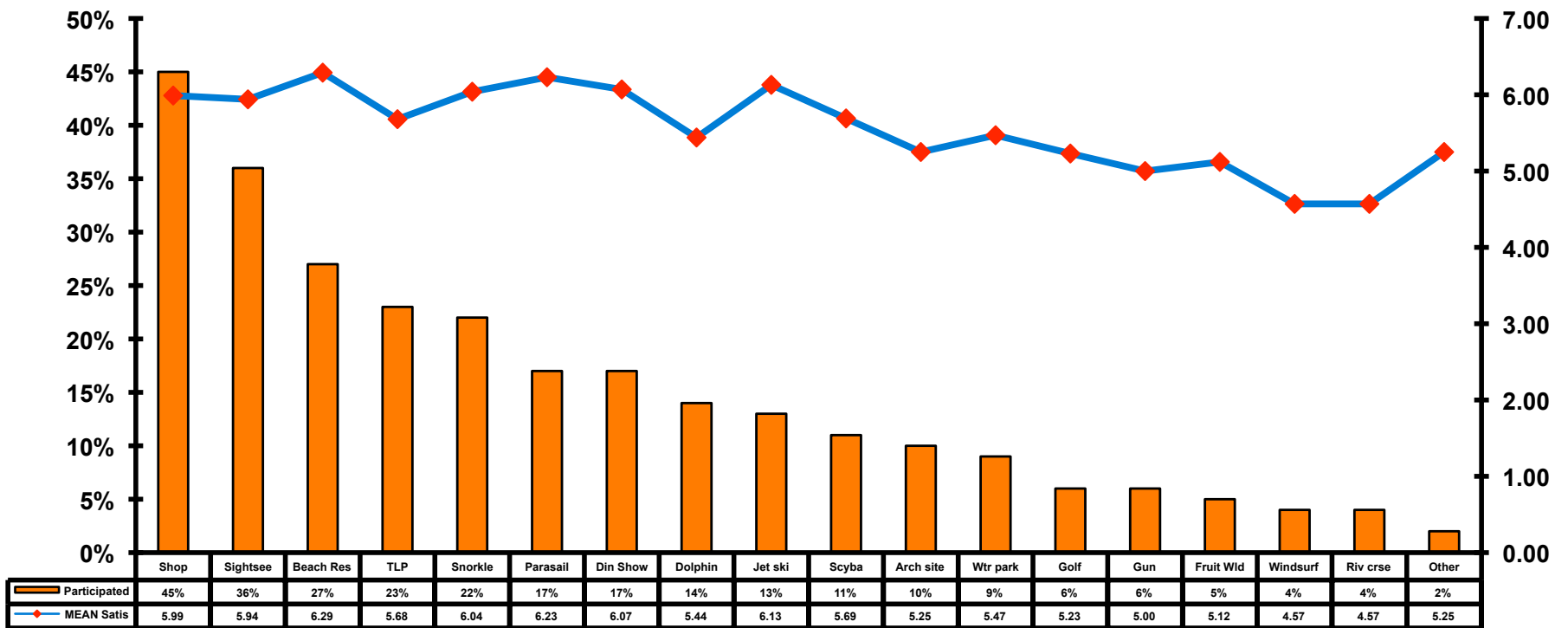
Night Tours Satisfaction

7pt Rating Scale

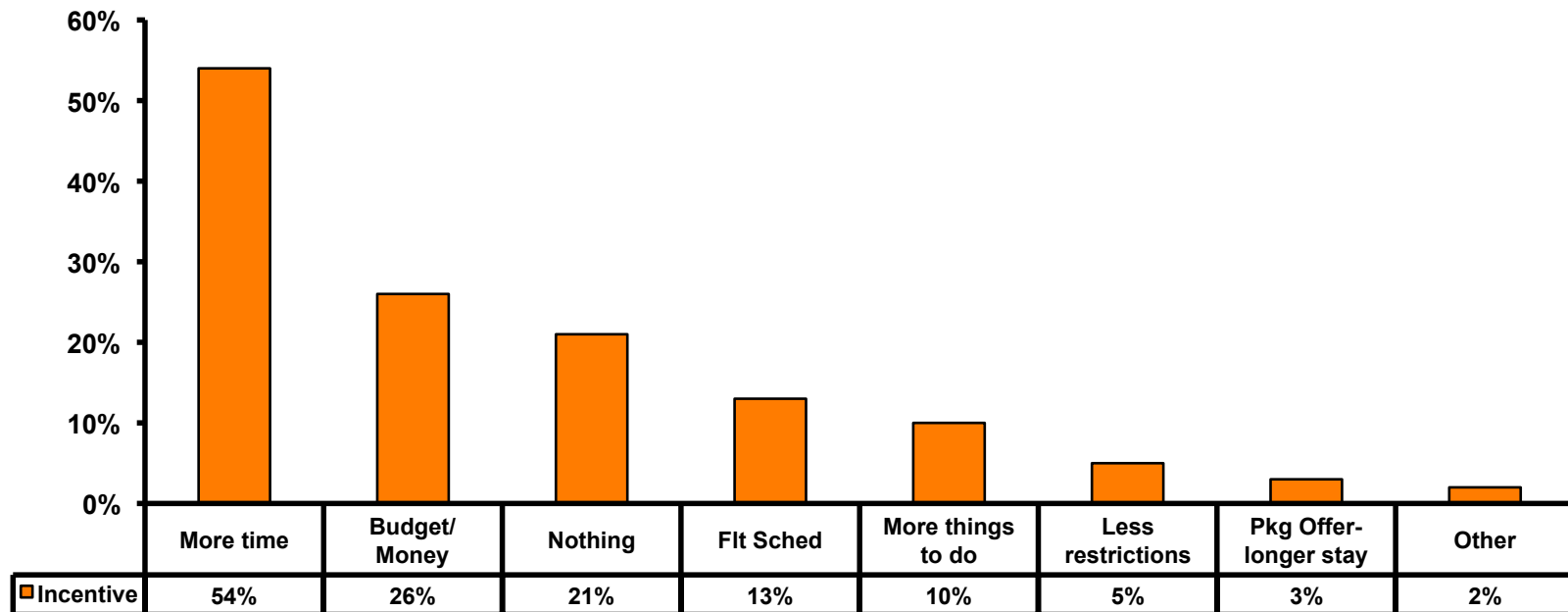
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 25%	Score of 6 to 7 = 25%
Score of 4 to 5 = 72%	Score of 4 to 5 = 71%
Score 1 to 3 = 3%	Score 1 to 3 = 4%
MEAN = 4.69	MEAN = 4.66

Satisfaction with Other Activities



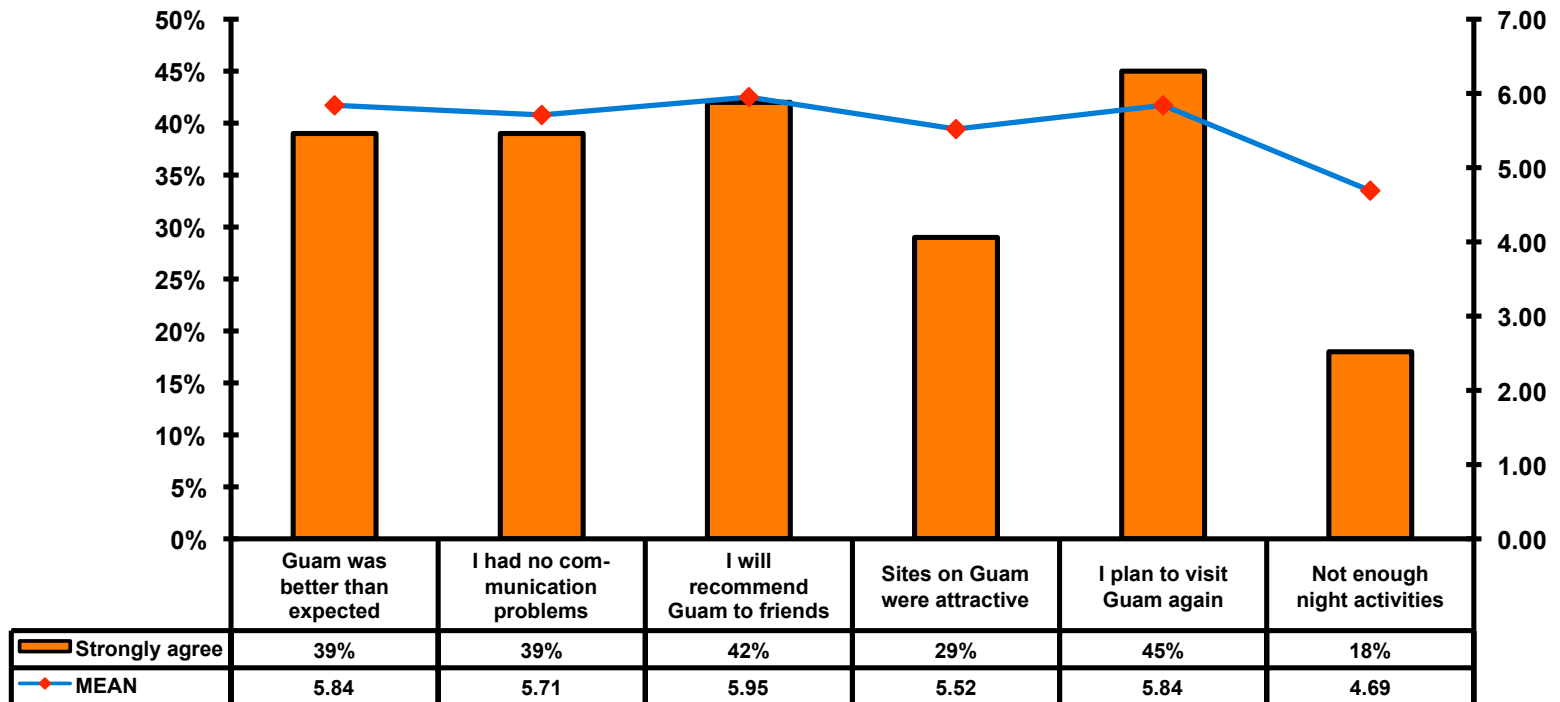
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

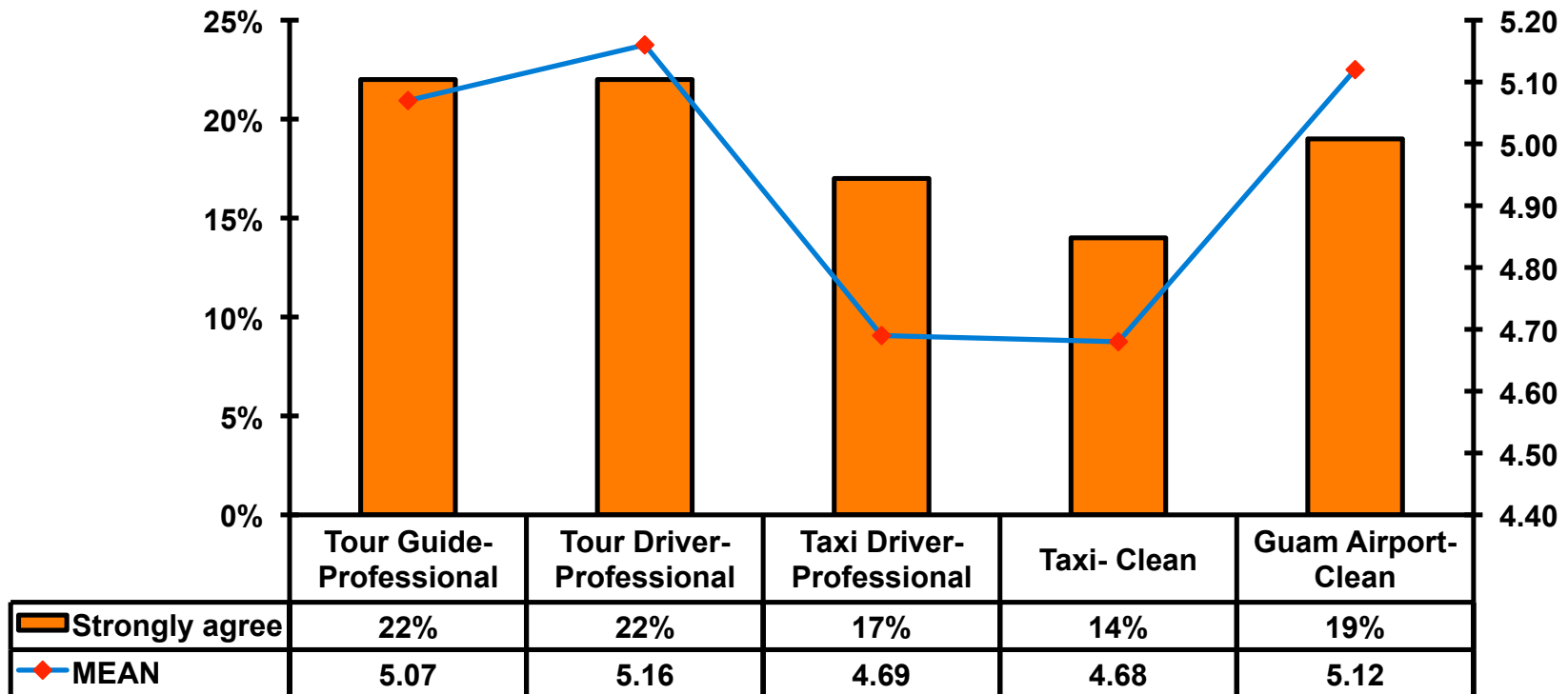
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

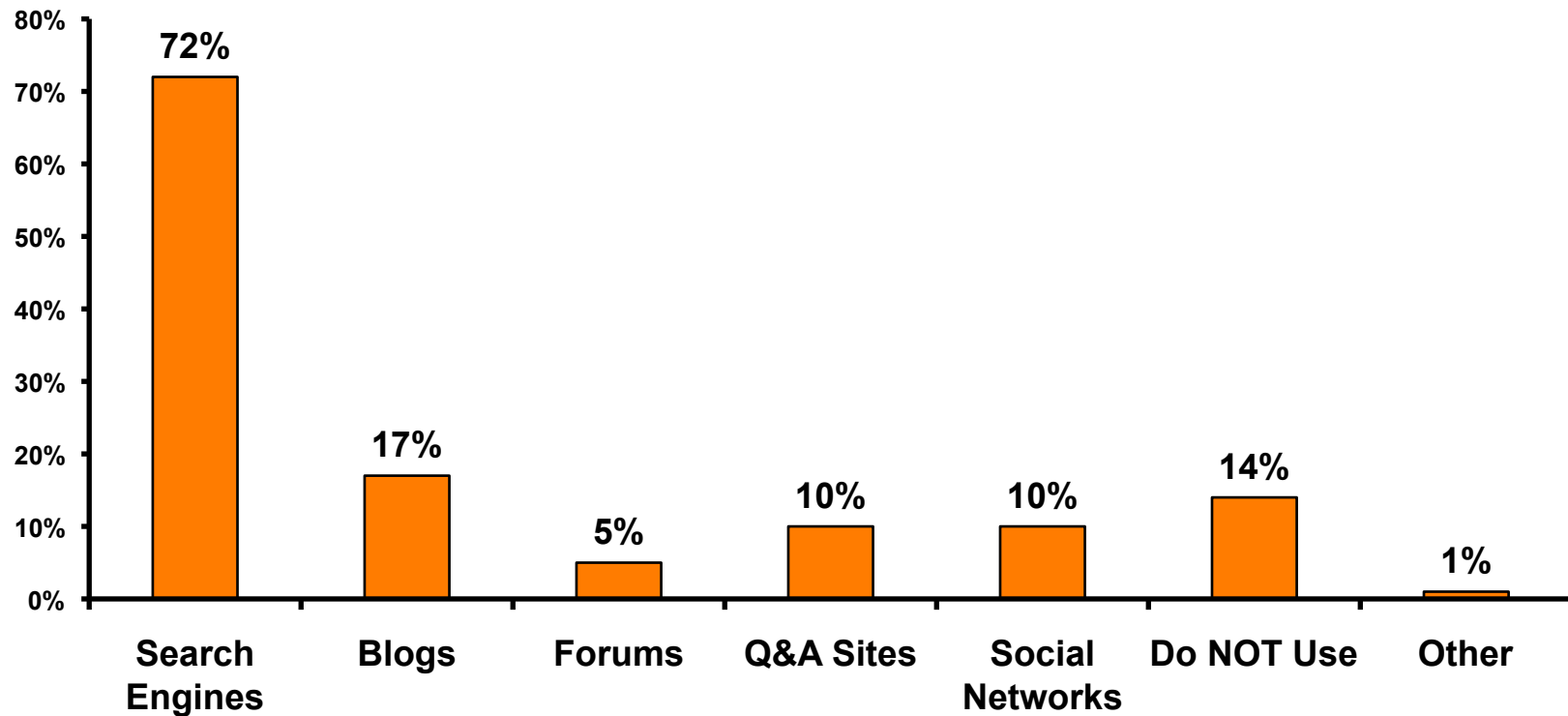
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



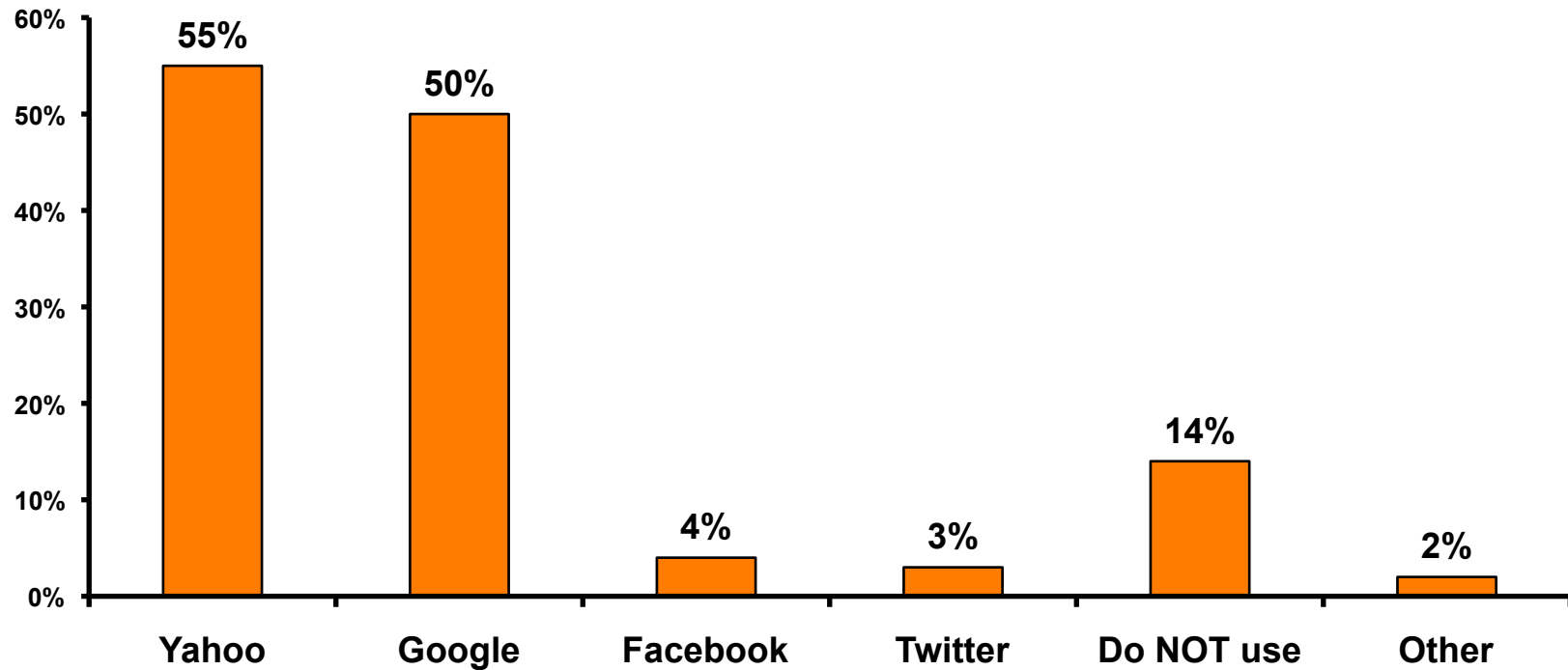
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

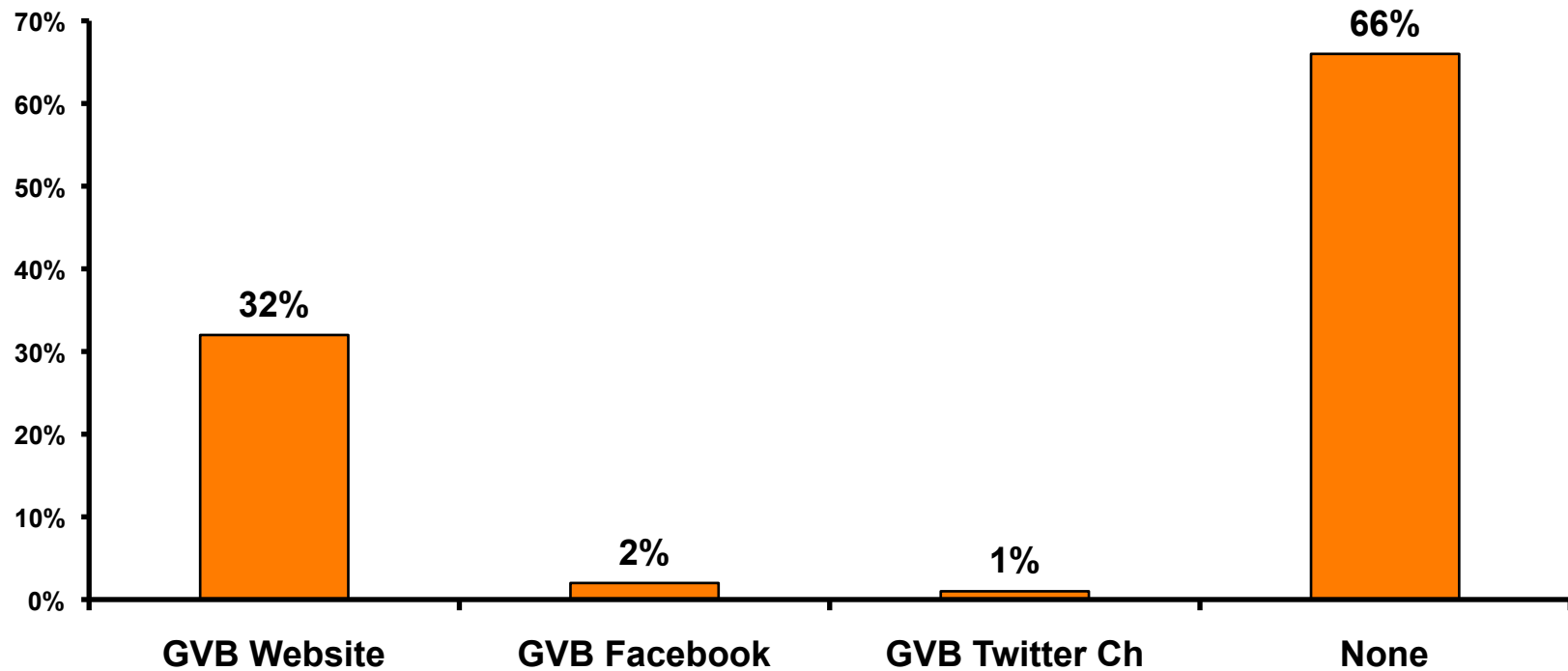


Internet- Things To Do

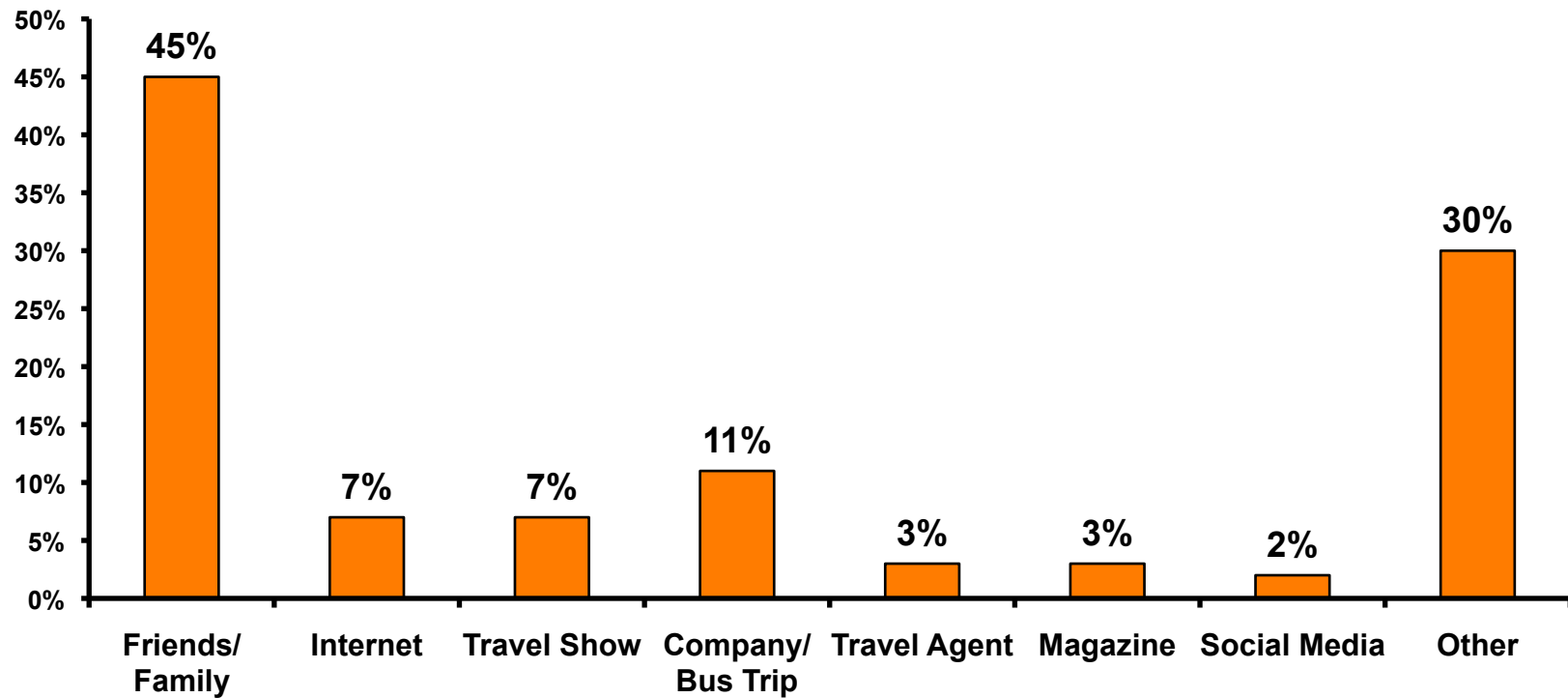
Sources of Info



Internet- GVB Sources

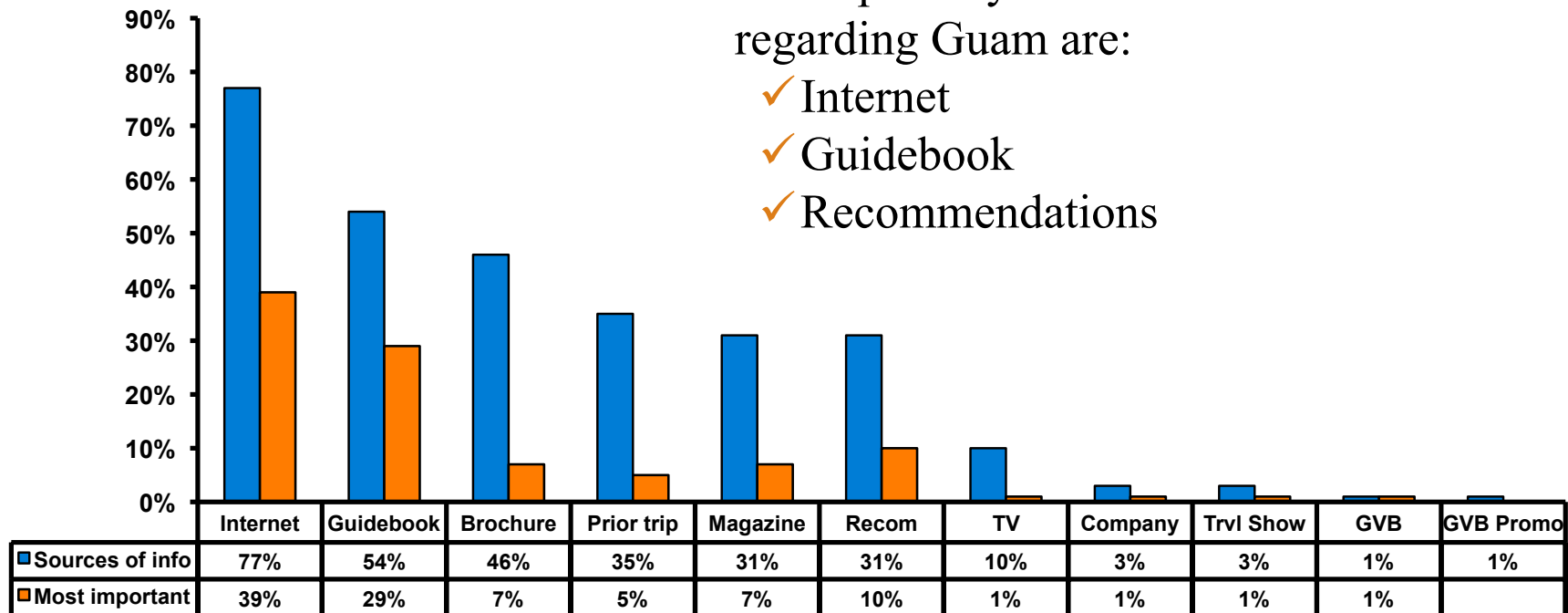


Travel Motivation- Info Sources



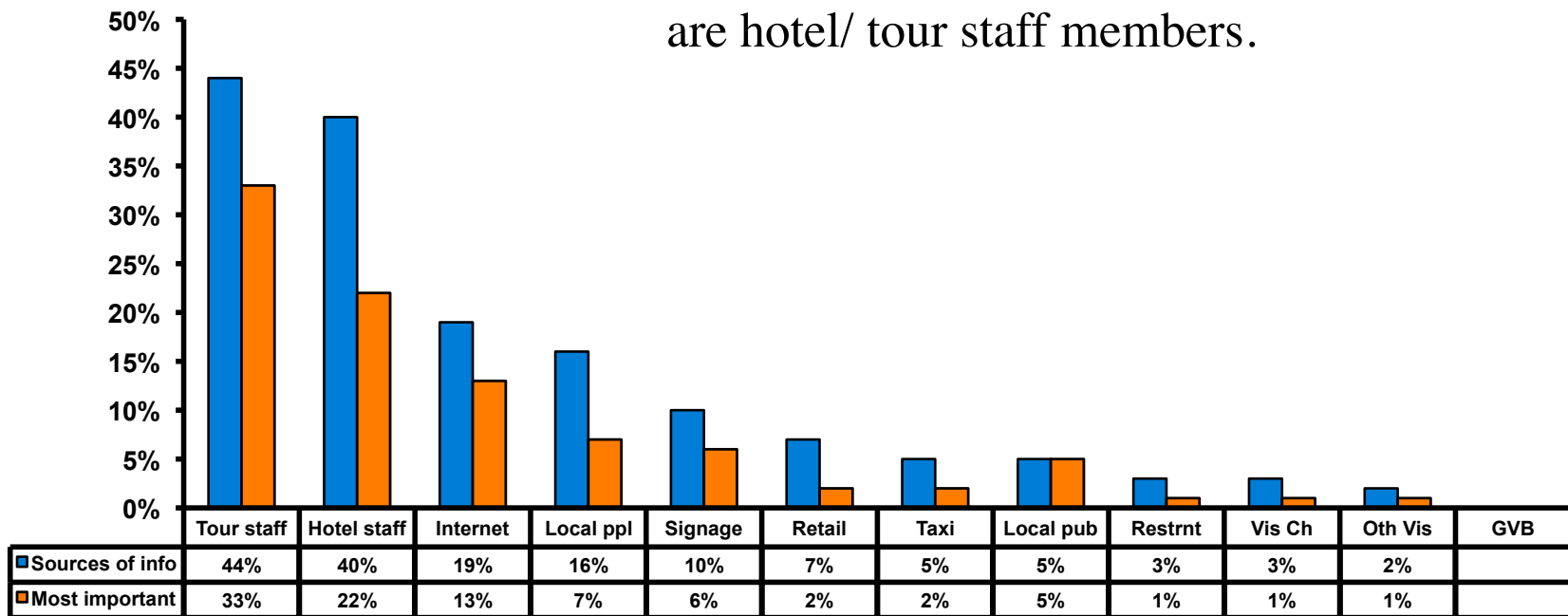
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

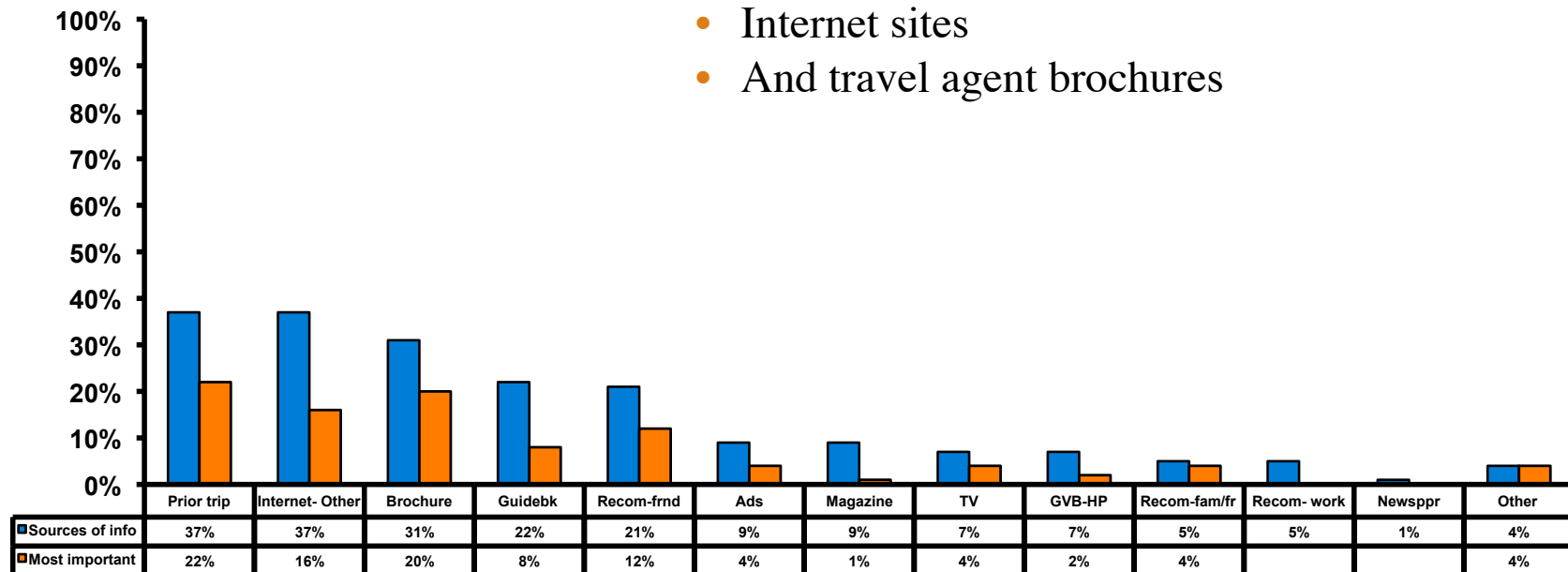
- The primary local source of information are hotel/ tour staff members.



Sources of Information - Motivation

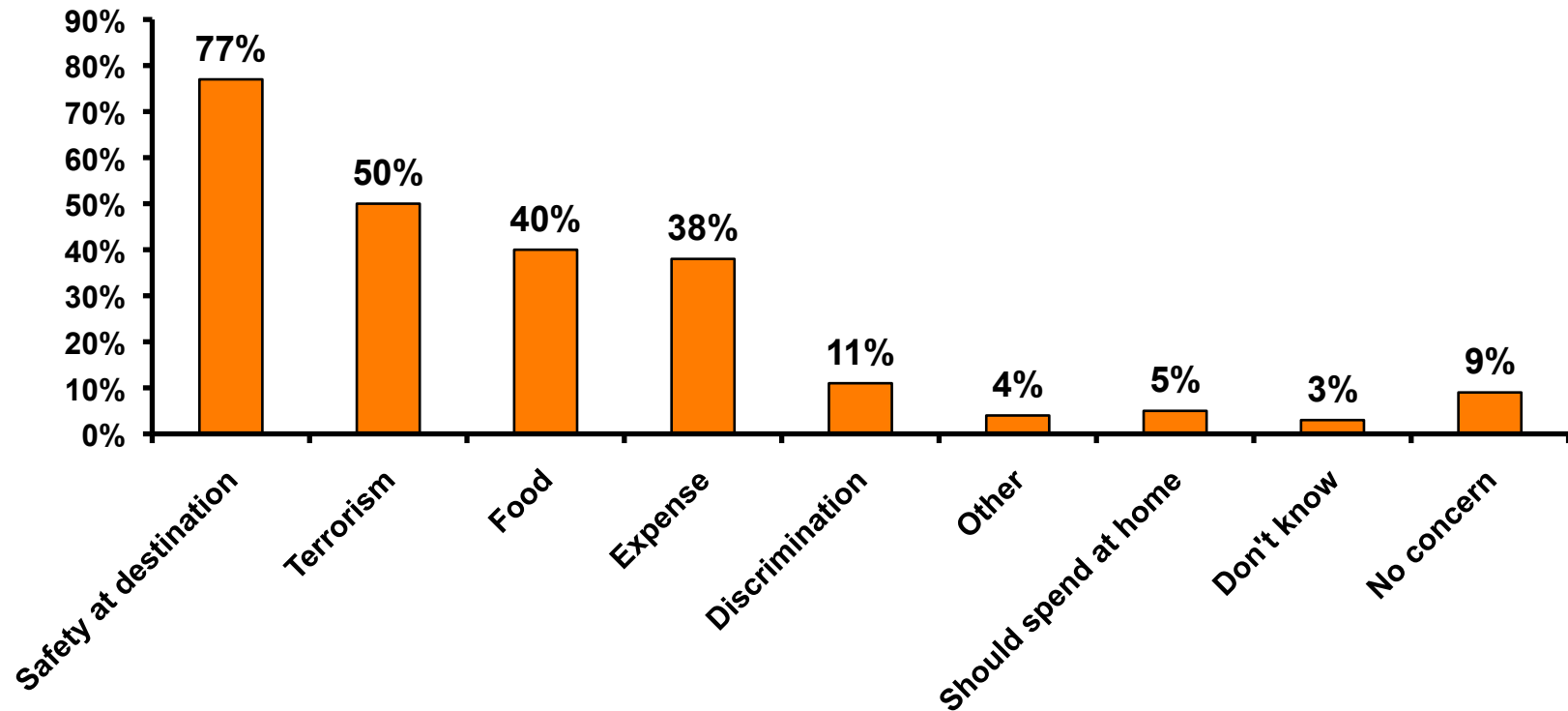
The primary motivational sources of information were.

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



SECTION 6 **OTHER ISSUES**

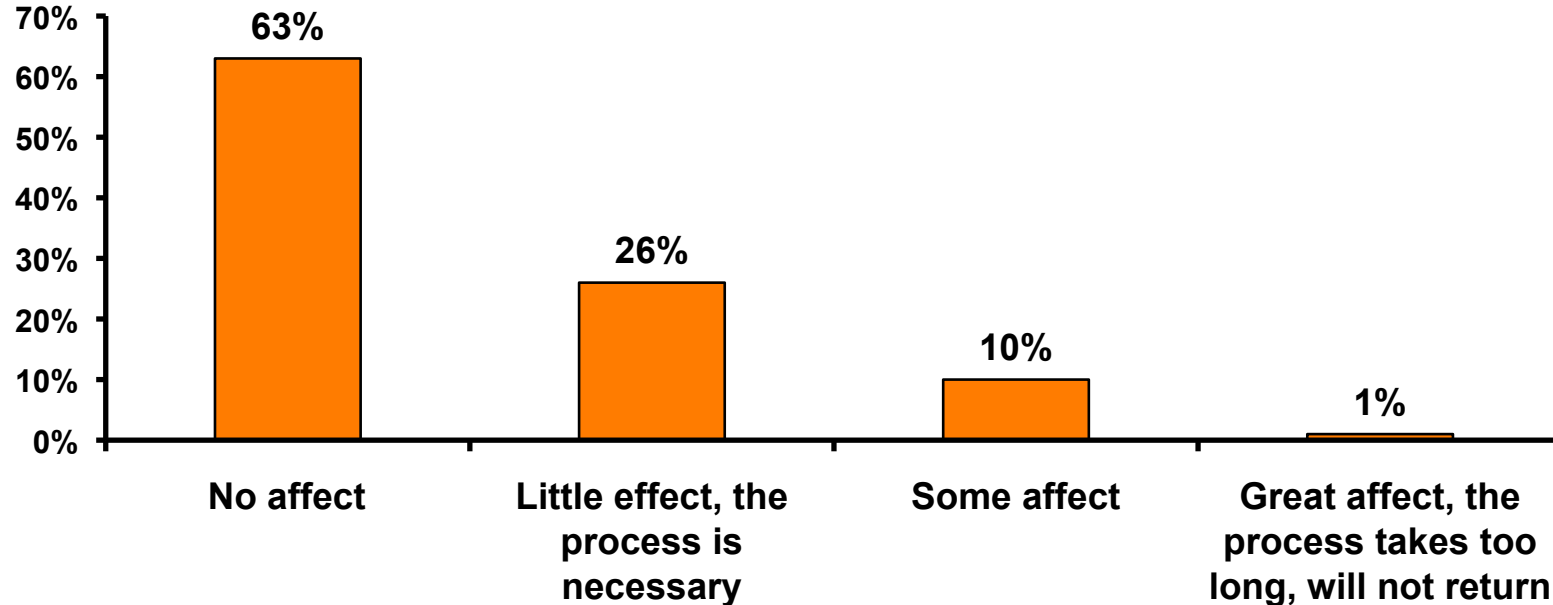
Concerns about travel outside of Japan - Overall



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	77%	76%	77%	72%	82%	62%	87%	74%	72%	87%	69%	70%	80%	
	Terrorism	50%	54%	50%	48%	45%	69%	51%	43%	56%	54%	59%	33%	50%	
	Food	40%	45%	36%	35%	52%	27%	47%	43%	42%	40%	38%	43%	20%	
	Expense	38%	36%	46%	30%	24%	38%	42%	45%	42%	38%	41%	17%	50%	
	Discrimination against Japanese	11%	10%	11%	12%	12%	15%	15%	7%	9%	14%	13%	13%	10%	
	No concerns	9%	9%	8%	12%	6%	12%	4%	10%	5%	11%	13%	13%	10%	
	Should spend at home	5%	4%	4%	3%	12%	12%	4%	5%	2%	3%	9%		10%	
	Other	4%	1%	6%	4%		4%	4%	2%	7%	3%	3%	7%		
	Don't know	3%	2%	2%	4%	3%	8%	4%	5%						
	Total	Count	349	89	157	69	33	26	53	42	43	63	32	30	10

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

