



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2014

AUGUST 2014



Prepared by: QMark Research

Information contained herein is the property of the Guam Visitors Bureau.

The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.

Background & Methodology

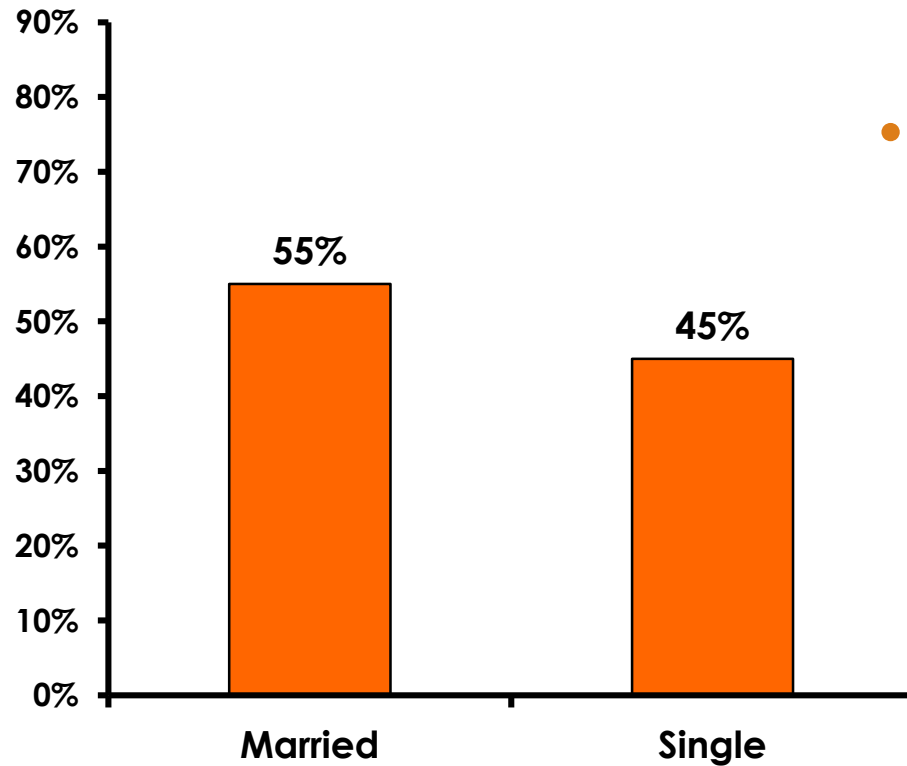
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing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

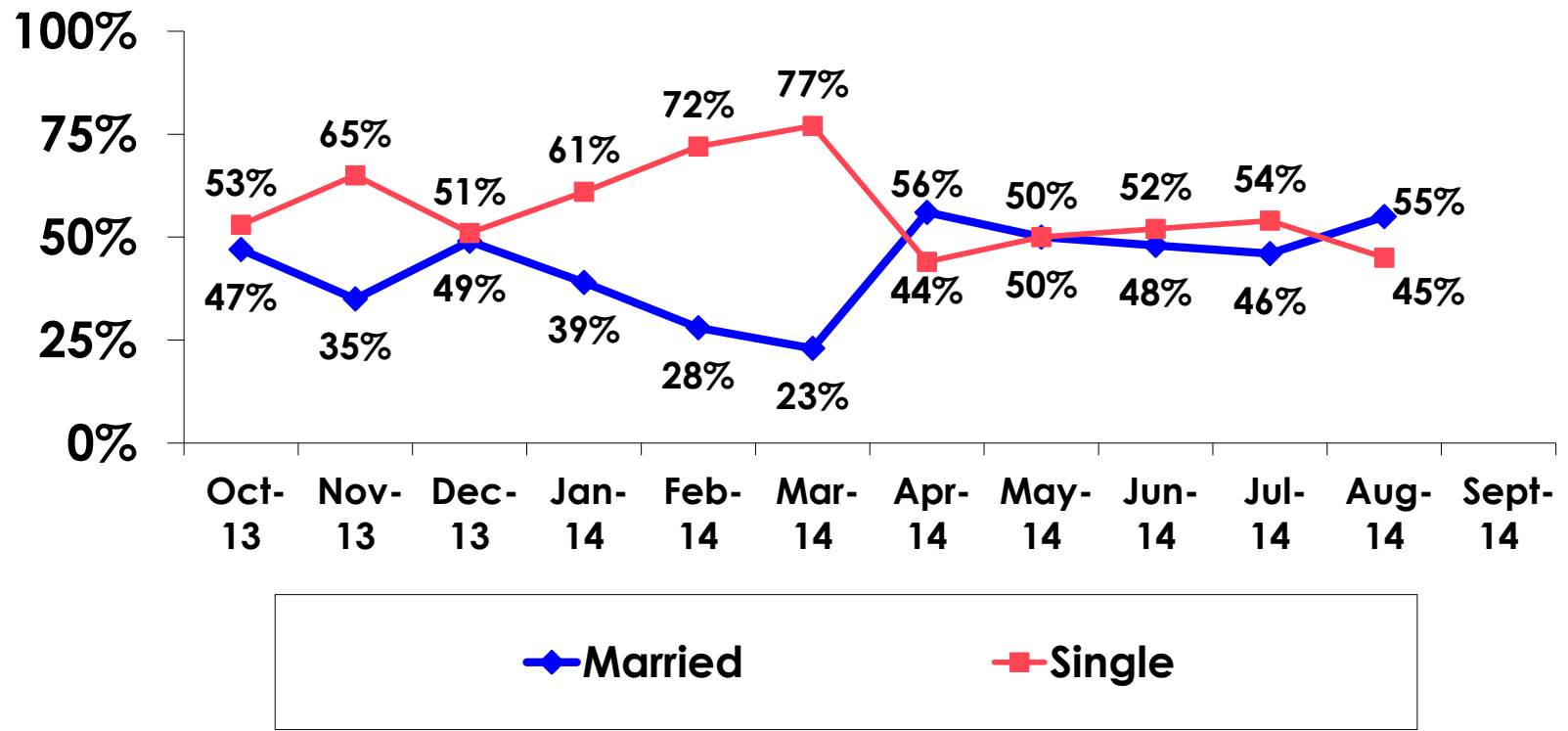
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

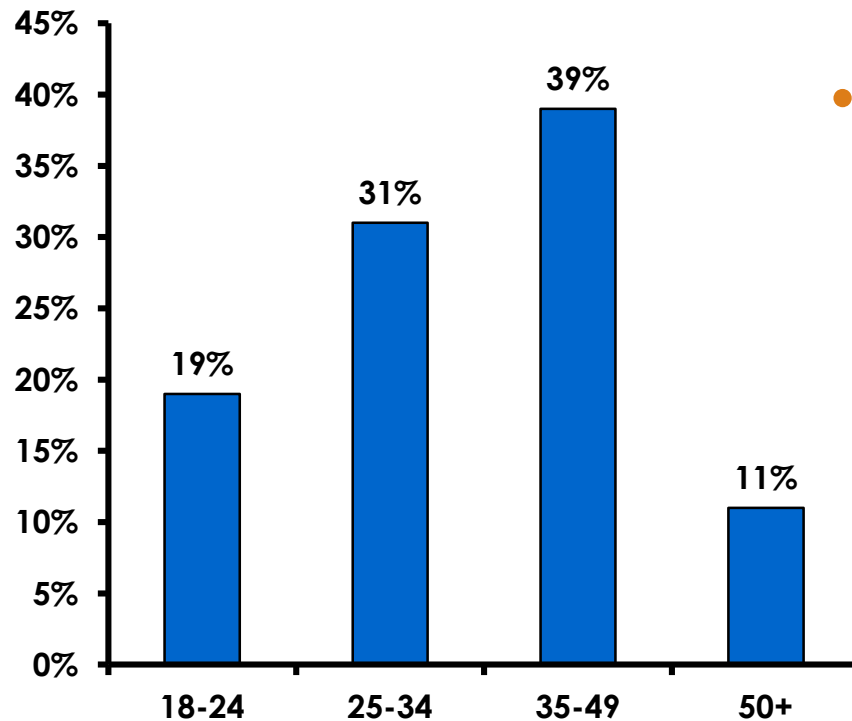


- 77% of male visitors are married.

MARITAL STATUS

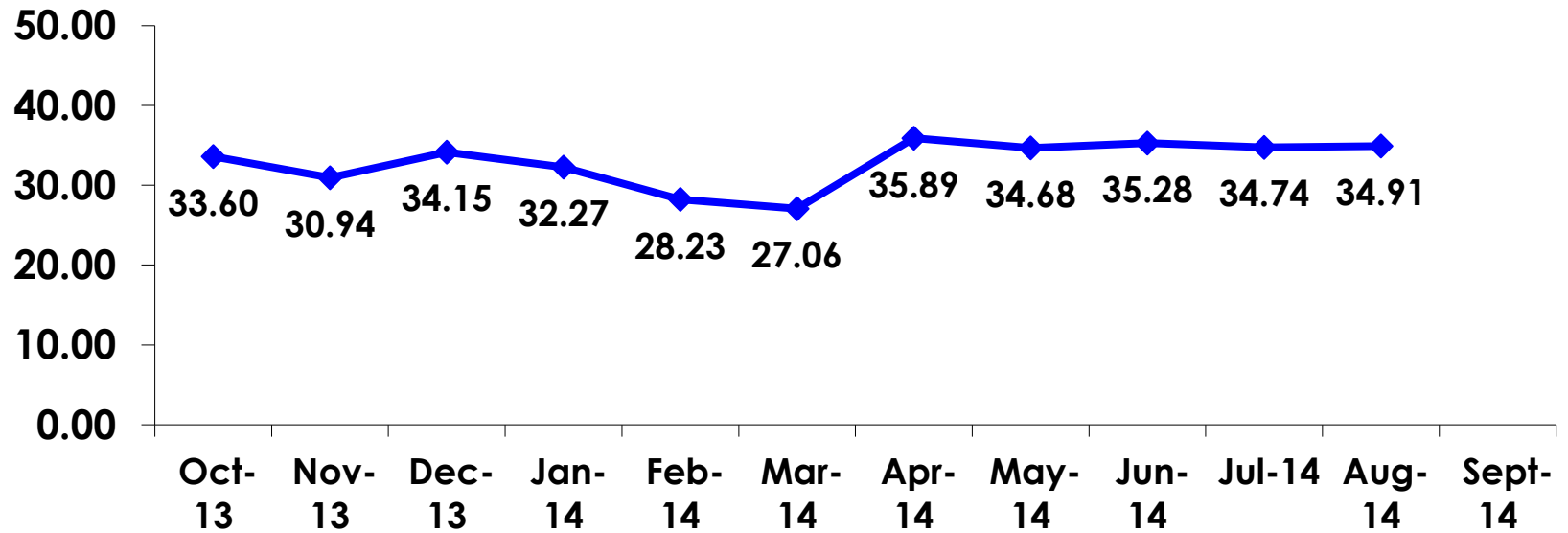


Age - Overall

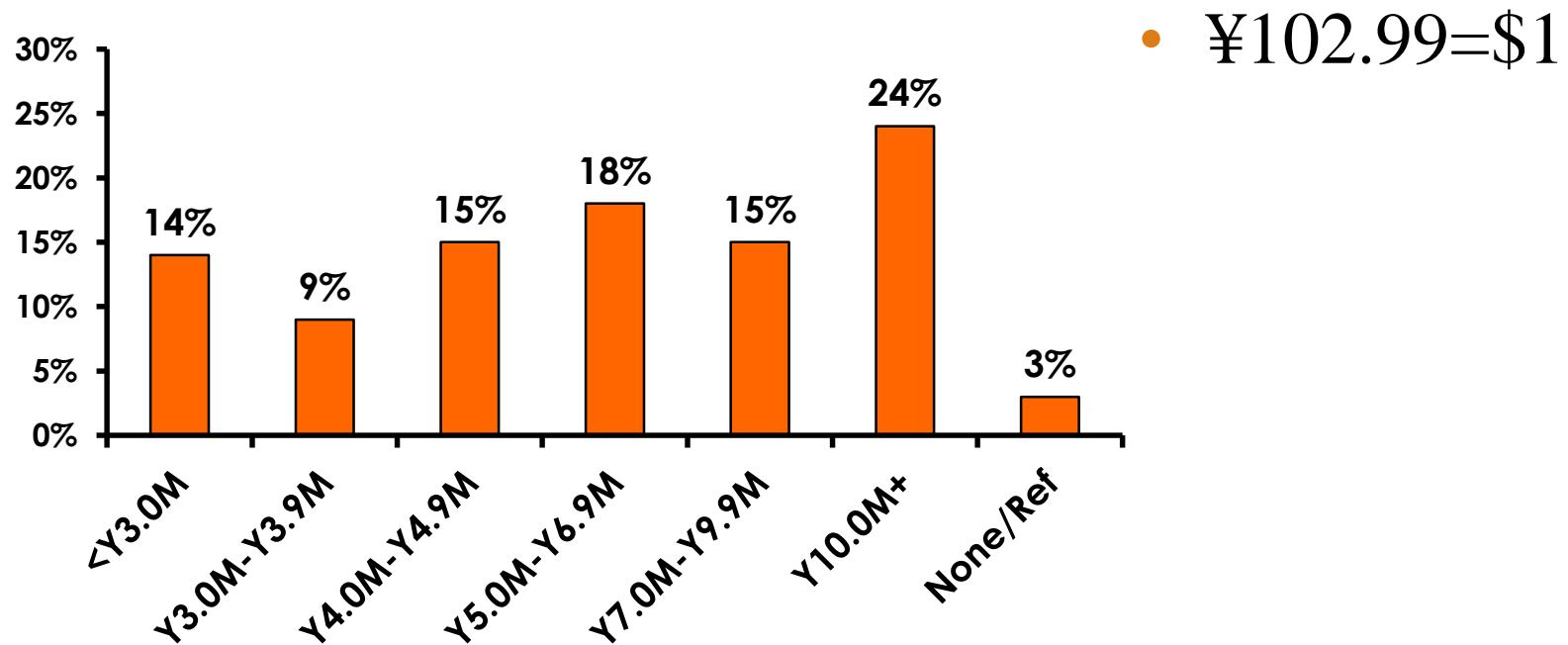


- The average age of the respondents is 34.91 years of age.

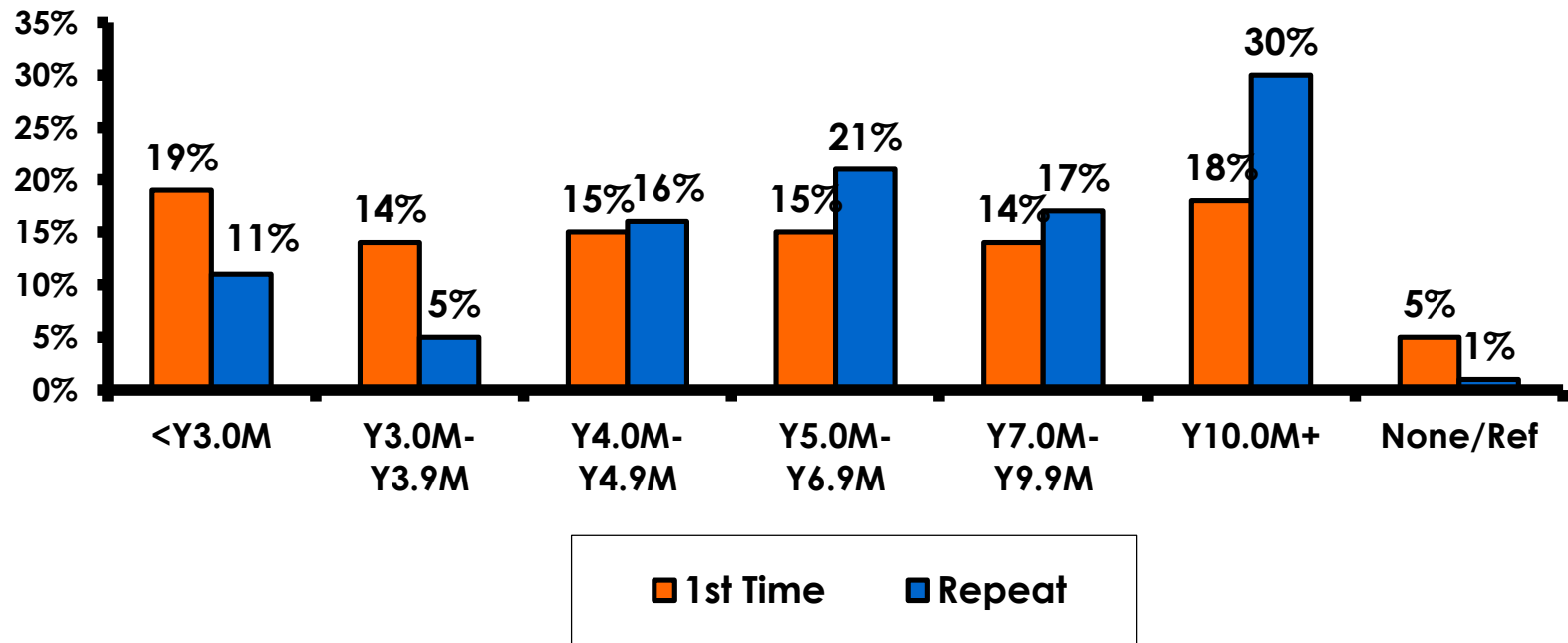
AVERAGE - AGE



Personal Income



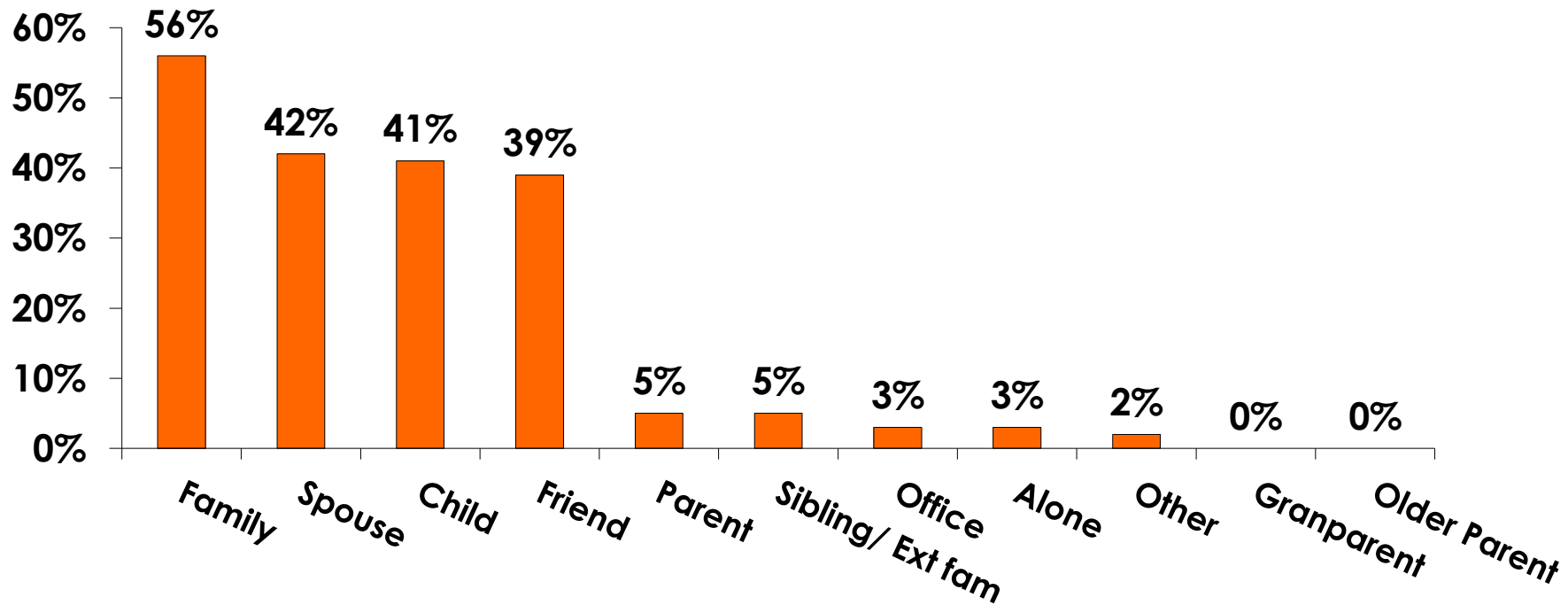
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	11		11	3	5	3	
		Column N %	3%		7%	5%	5%	2%	
	Y2.0M-Y3.0M	Count	38	6	32	16	19	3	
		Column N %	11%	3%	20%	25%	19%	2%	
	Y3.0M-Y4.0M	Count	32	14	18	7	15	8	2
		Column N %	9%	8%	11%	11%	15%	6%	6%
	Y4.0M-Y5.0M	Count	52	29	23	8	21	17	6
		Column N %	15%	17%	14%	12%	21%	13%	17%
	Y5.0M-Y7.0M	Count	62	38	24	7	19	32	4
		Column N %	18%	22%	15%	11%	19%	24%	11%
	Y7.0M-Y10.0M	Count	52	37	15	5	10	28	9
		Column N %	15%	21%	9%	8%	10%	21%	25%
	Y10.0M+	Count	83	49	34	12	12	44	15
		Column N %	24%	28%	21%	18%	12%	32%	42%
	No Income	Count	9	2	7	7	1	1	
		Column N %	3%	1%	4%	11%	1%	1%	
	Total	Count	339	175	164	65	102	136	36

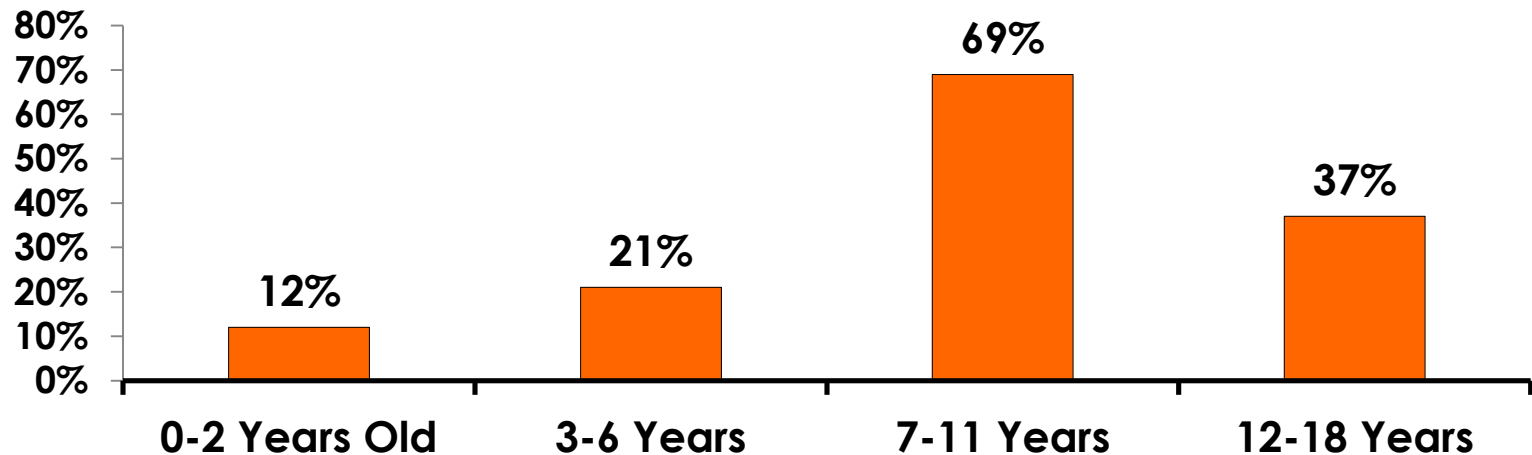
Travel Companions



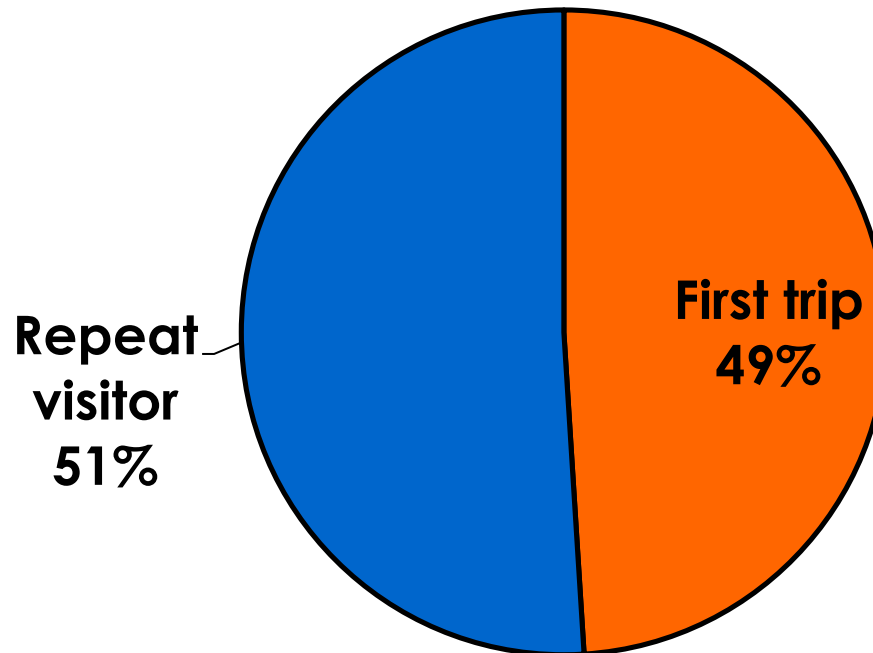
Number of Children Travel Party

N=144 total respondents traveling with children.

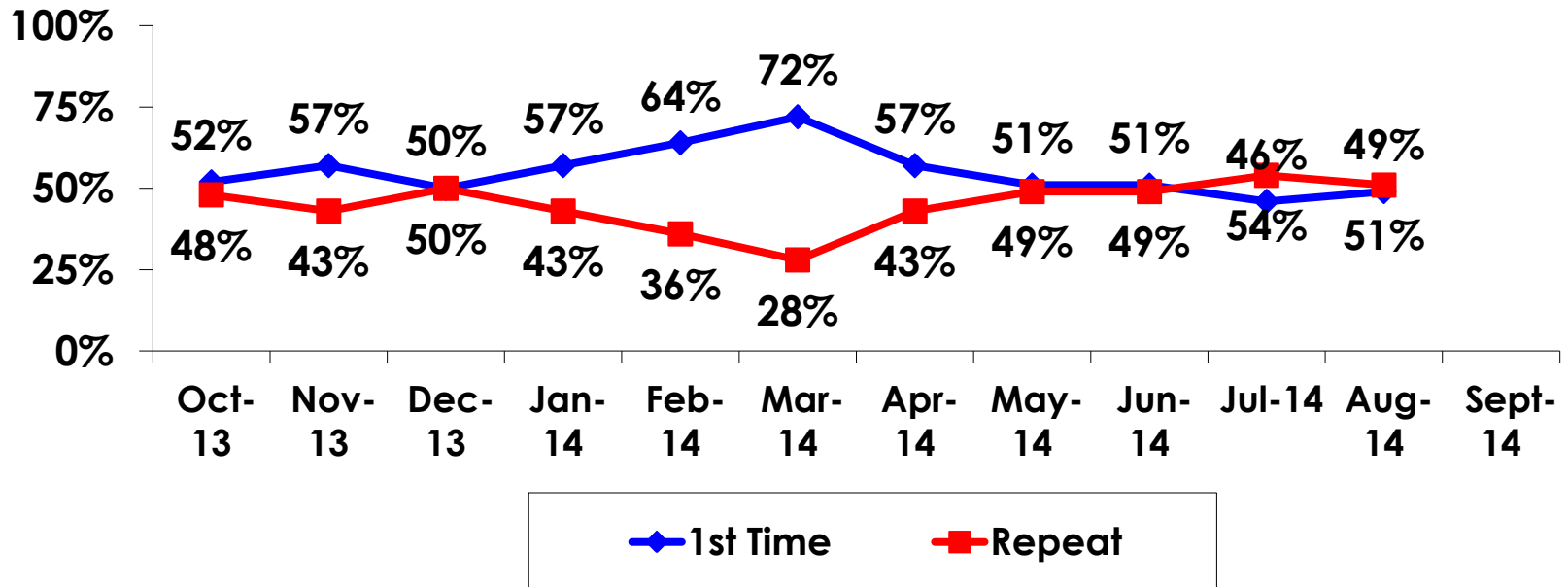
(Of those N=144 respondents, there is a total of 250 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



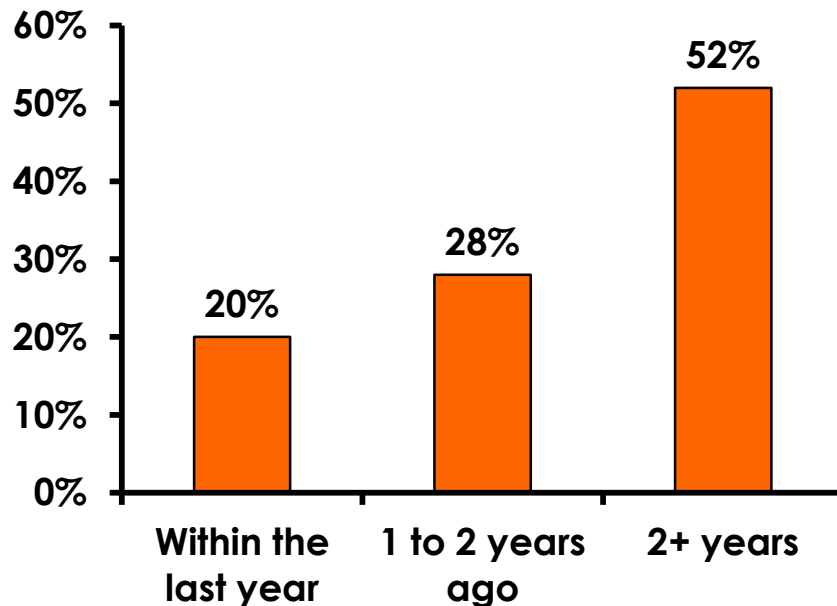
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	180	75	104
		Column N %	51%	44%	58%
	Female	Count	172	97	75
		Column N %	49%	56%	42%
Total		Count	352	172	179
AGE	18-24	Count	68	48	19
		Column N %	19%	28%	11%
	25-34	Count	108	67	41
		Column N %	31%	39%	23%
	35-49	Count	138	44	94
		Column N %	39%	26%	53%
	50+	Count	37	13	24
		Column N %	11%	8%	13%
Total		Count	351	172	178

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

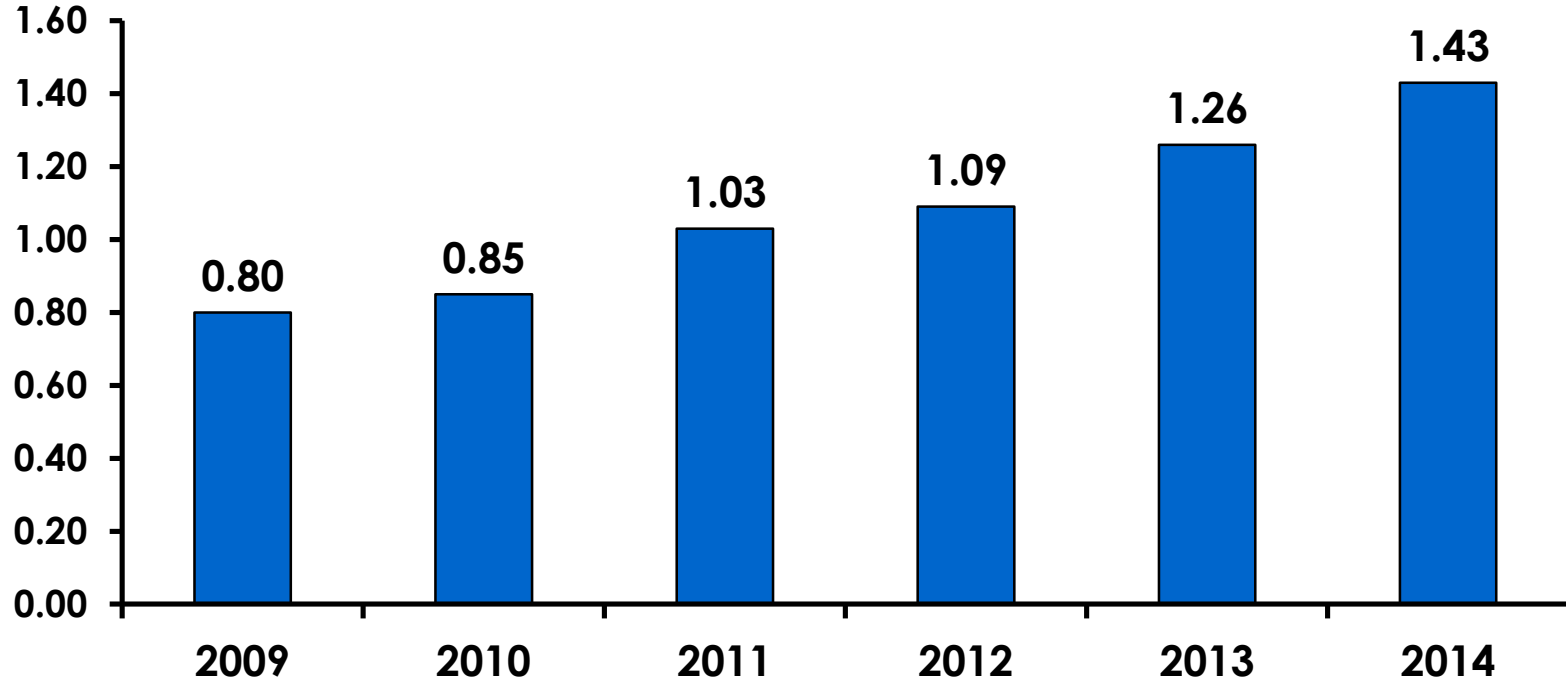
Repeat Visitors Last Trip

n = 174



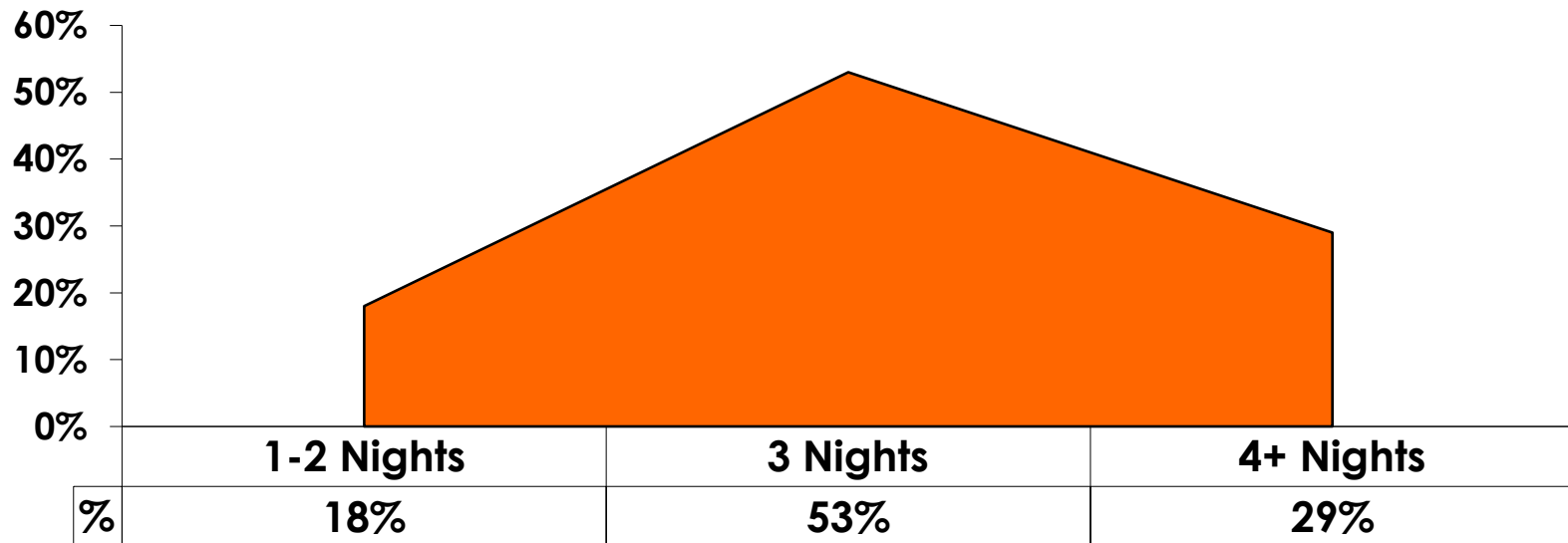
- The average repeat visitor has been to Guam 3.14 times.
- Half the repeat visitors have been to Guam within the last 2 years.

Average Number Overnight Trips (2009-2014) (2 nights or more)

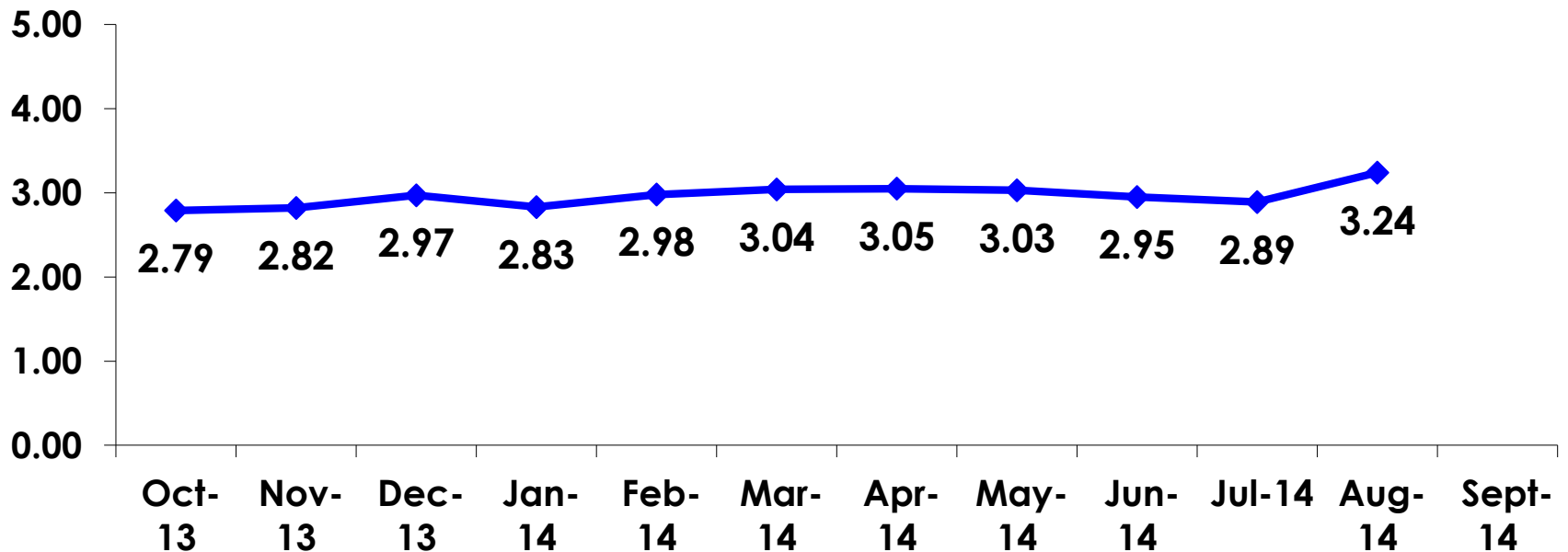


Length of Stay

Mean = 3.24 Days
Median = 3.0 Days



AVG LENGTH OF STAY

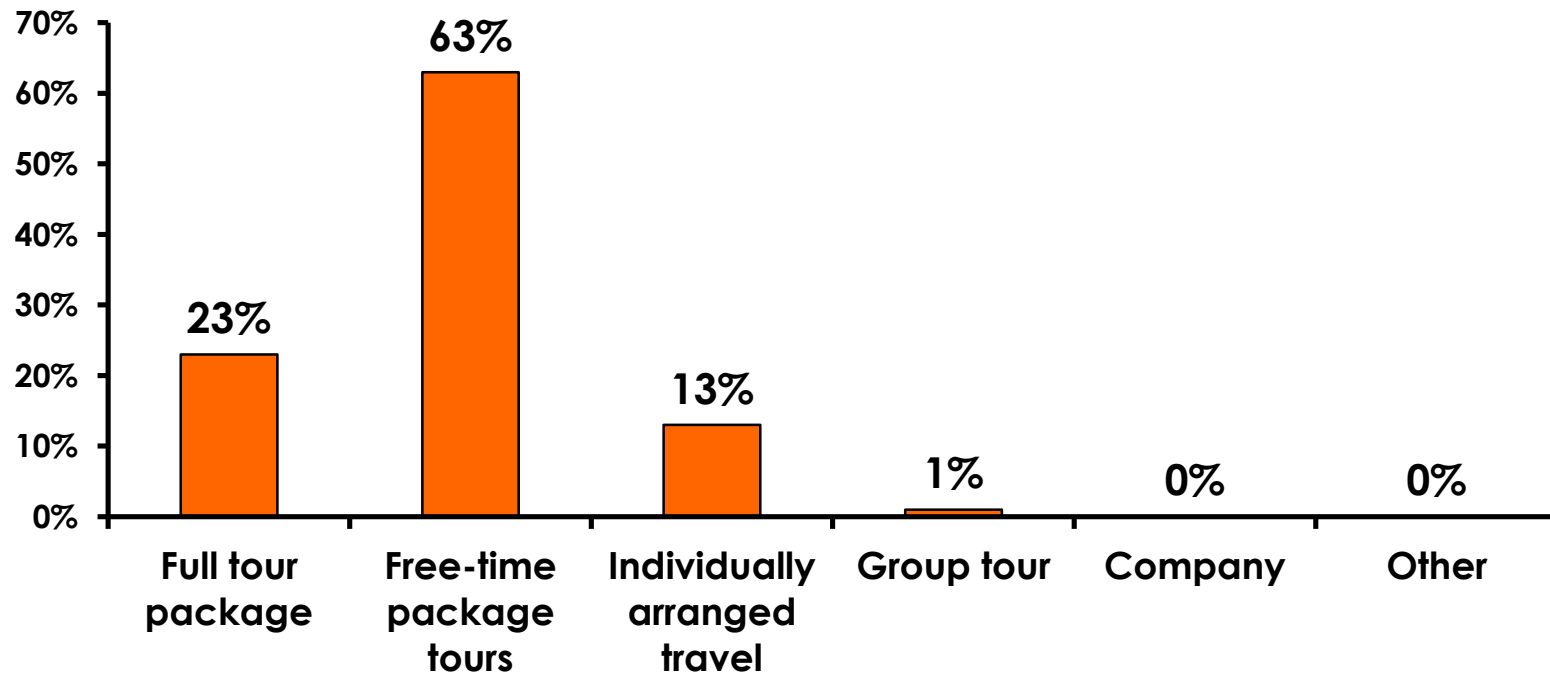


Occupation by Income

		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	Office worker non-mgr	14%	36%	21%	31%	8%	11%	13%	8%		
	Salesperson	13%	9%	5%	3%	27%	18%	12%	12%		
	Engineer	12%		13%	9%	12%	23%	17%	6%		
	Manager	9%		3%		4%	6%	21%	18%		
	Teacher	9%	18%	37%	13%	6%	3%	2%	5%		
	Student	7%		3%	3%	6%	5%	4%	8%	67%	
	Homemaker	7%				12%	5%	8%	12%	11%	
	Self-employed	7%			9%	8%	6%	10%	10%		
	Professional/ Specialist	5%		3%	6%	6%	2%		11%		
	Skilled worker	5%	18%		9%	4%	11%		1%		
	Govt- office worker non-mgr	4%	9%	11%	9%	2%	5%	2%	1%		
	Other	2%				4%	5%	4%	1%		
	Unemployed	2%	9%	5%	3%					22%	
	Govt- Manager	2%						4%	4%		
	Executive (30+ employees)	2%				4%		4%	2%		
	Freeter	1%			3%						
	Total	Count	348	11	38	32	52	62	52	83	9

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

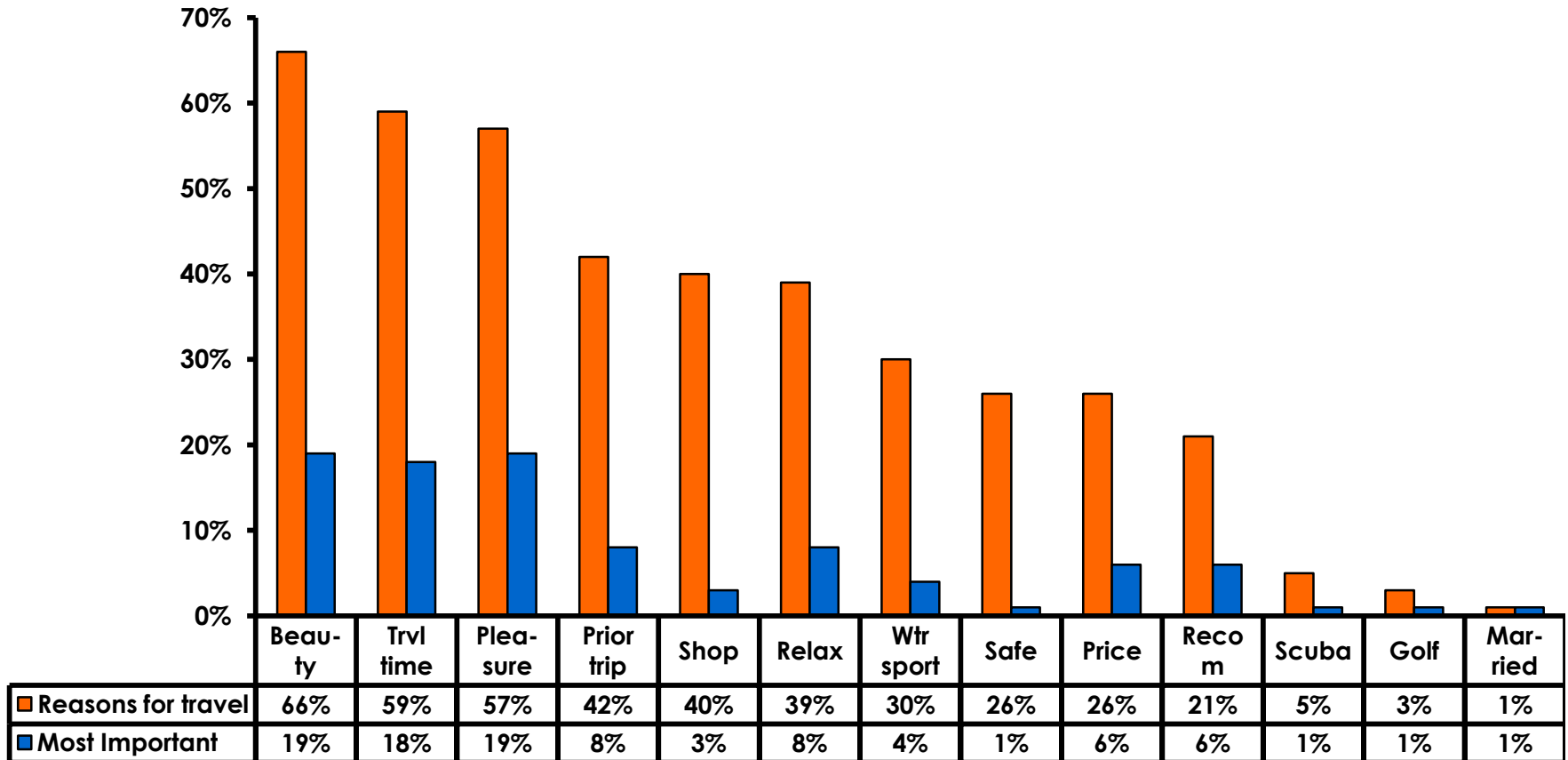


Accommodation by Income

Average length of stay: 3.24 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	16%	9%	32%	9%	21%	18%	13%	11%	11%	
	Outrigger Guam Resort	9%	9%	11%	13%	4%	13%	12%	8%		
	Guam Reef & Olive Spa	8%	9%	5%	3%	13%	10%	8%	7%		
	Onward Beach Resort	7%		5%	6%	8%	6%	12%	7%	11%	
	Hilton Guam Resort	7%		3%	9%	10%	5%	10%	6%		
	Hotel Nikko Guam	7%			3%	4%	3%	13%	11%	11%	
	Holiday Resort Guam	6%	9%	3%		10%	5%	2%	7%	22%	
	PIC Club	6%			3%	2%	6%	10%	11%		
	Leo Palace Resort	5%		8%	3%		3%	4%	6%	22%	
	Grand Plaza Hotel	4%	27%	8%	9%	6%			4%		
	Fiesta Resort Guam	4%		3%	13%	2%	6%	2%	2%		
	Pacific Bay Hotel	4%		5%		2%	10%	2%	1%		
	Westin Resort Guam	4%		3%	13%	6%	2%	2%	4%		
	Sheraton Laguna Guam	3%	18%	8%		2%	3%	4%			
	Other	3%		3%		2%	3%	2%	4%		
	Royal Orchid Guam	3%	9%	5%	9%	2%		2%	1%		
	Hyatt Regency Guam	2%				4%		2%	5%		
	Ramada Suites Guam	1%				2%	2%		1%	11%	
	Verona Resort & Spa	1%			3%		3%				
	Condo	1%	9%		3%				1%		
	Bayview Hotel	1%						2%	1%	11%	
	Guam Marriott Resort	1%				2%			1%		
	Tumon Bay Capital Hotel	0%					2%				
	Total	Count	352	11	38	32	52	62	52	83	9

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Pleasure,
- Guam's natural beauty/ beaches 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	66%	79%	64%	61%	68%	61%	71%	
	Short travel time	59%	53%	52%	64%	65%	62%	55%	
	Pleasure	57%	66%	59%	53%	46%	50%	64%	
	Previous trip	42%	21%	29%	61%	49%	48%	36%	
	Shopping	40%	44%	50%	30%	38%	30%	49%	
	Relax	39%	53%	41%	32%	32%	35%	43%	
	Water sports	30%	32%	37%	22%	35%	28%	33%	
	Safe	26%	19%	23%	31%	24%	30%	22%	
	Price	26%	32%	20%	28%	24%	23%	29%	
	Recomm- friend/family/trvl agnt	21%	29%	30%	11%	19%	15%	27%	
	Scuba	5%	3%	9%	2%	5%	7%	3%	
	Other	4%		4%	5%	5%	5%	2%	
	Golf	3%		1%	6%	8%	6%	1%	
	Married/ Attn wedding	1%		1%	2%	3%	2%	1%	
	Honeymoon	1%	1%	3%			1%	1%	
	Company/ Business Trip	1%		2%	1%		2%		
	Organized sports	1%		1%	1%		1%		
	Visit friends/ Relatives	1%	1%				1%		
	Career Cert/ Testing	0%				3%	1%		
	Company Sponsored	0%				3%		1%	
	Total	Count	350	68	107	137	37	178	172

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	66%	73%	71%	63%	59%	63%	71%	64%	67%	
	Short travel time	59%	55%	61%	53%	51%	65%	53%	66%	44%	
	Pleasure	57%	55%	68%	38%	47%	65%	55%	58%	44%	
	Previous trip	42%	18%	34%	22%	43%	45%	43%	59%	11%	
	Shopping	40%	45%	58%	31%	47%	35%	41%	31%	44%	
	Relax	39%	55%	58%	28%	39%	37%	35%	37%	33%	
	Water sports	30%	36%	45%	28%	27%	21%	33%	28%	33%	
	Safe	26%	18%	21%	6%	31%	27%	31%	28%	22%	
	Price	26%	18%	32%	25%	27%	31%	24%	22%	22%	
	Recomm- friend/family/trvl agnt	21%	27%	29%	38%	27%	16%	14%	14%	44%	
	Scuba	5%			6%	8%	5%	2%	7%	11%	
	Other	4%		5%	3%	4%	3%	4%	5%		
	Golf	3%				2%	2%	8%	6%		
	Married/ Attn wedding	1%			6%	4%	2%				
	Honeymoon	1%				2%	3%			11%	
	Company/ Business Trip	1%		3%	3%				1%		
	Organized sports	1%						2%	1%		
	Visit friends/ Relatives	1%						2%			
	Career Cert/ Testing	0%							1%		
	Company Sponsored	0%							1%		
	Total	Count	350	11	38	32	51	62	51	83	9

SECTION 3 **EXPENDITURES**

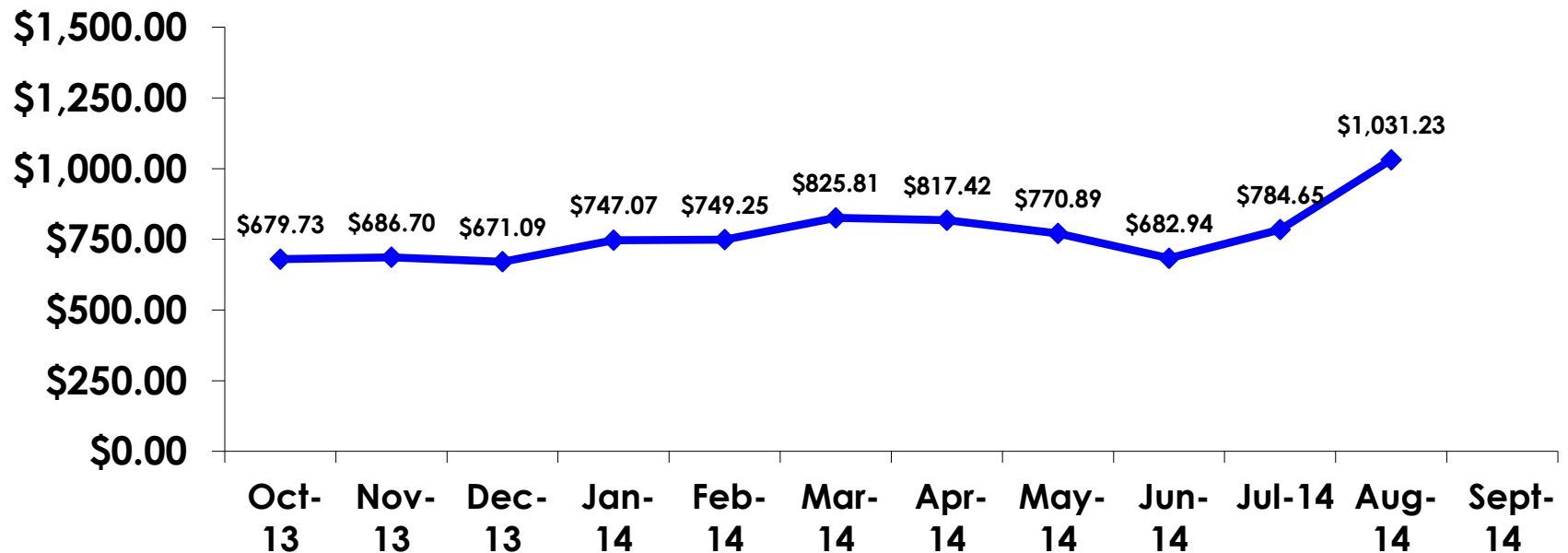
Prepaid Expenditures

¥102.99/US\$1

- \$2,542.19 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$16,506 = maximum (highest amount recorded for the entire sample)
- \$1,031.23 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$767.98

Breakdown of Prepaid Expenditures

¥102.99=\$1

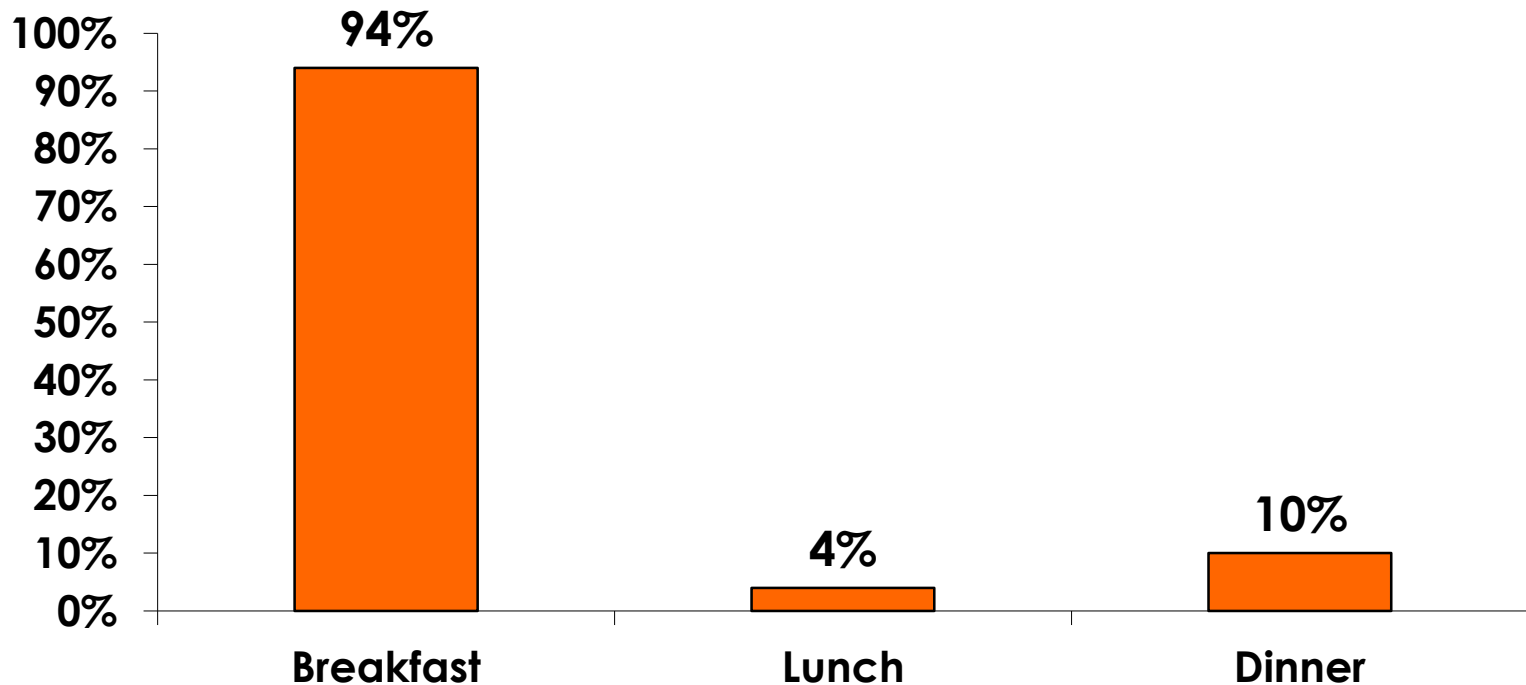
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$2,293.65
Air & Accommodation w/ daily meal package	\$4,036.12
Air only	\$2,279.25
Accommodation only	\$938.20
Accommodation w/ daily meal only	\$1,505.00
Food & Beverages in Hotel	\$100.87
Ground transportation – Japan	\$76.86
Ground transportation – Guam	\$380.16
Optional tours/ activities	\$316.75
Other expenses	\$349.25
Total Prepaid	\$2,542.19

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=52

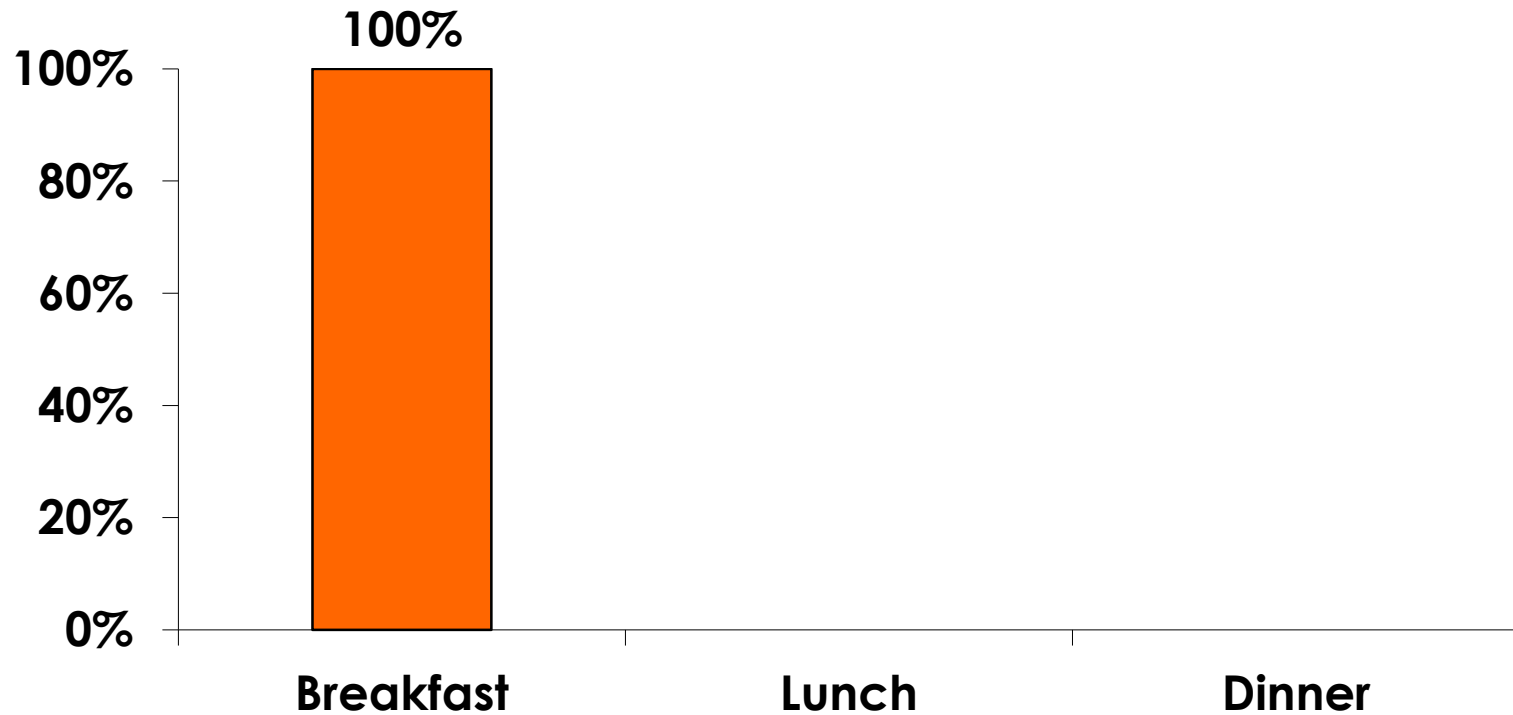


Mean=\$4,036.12 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

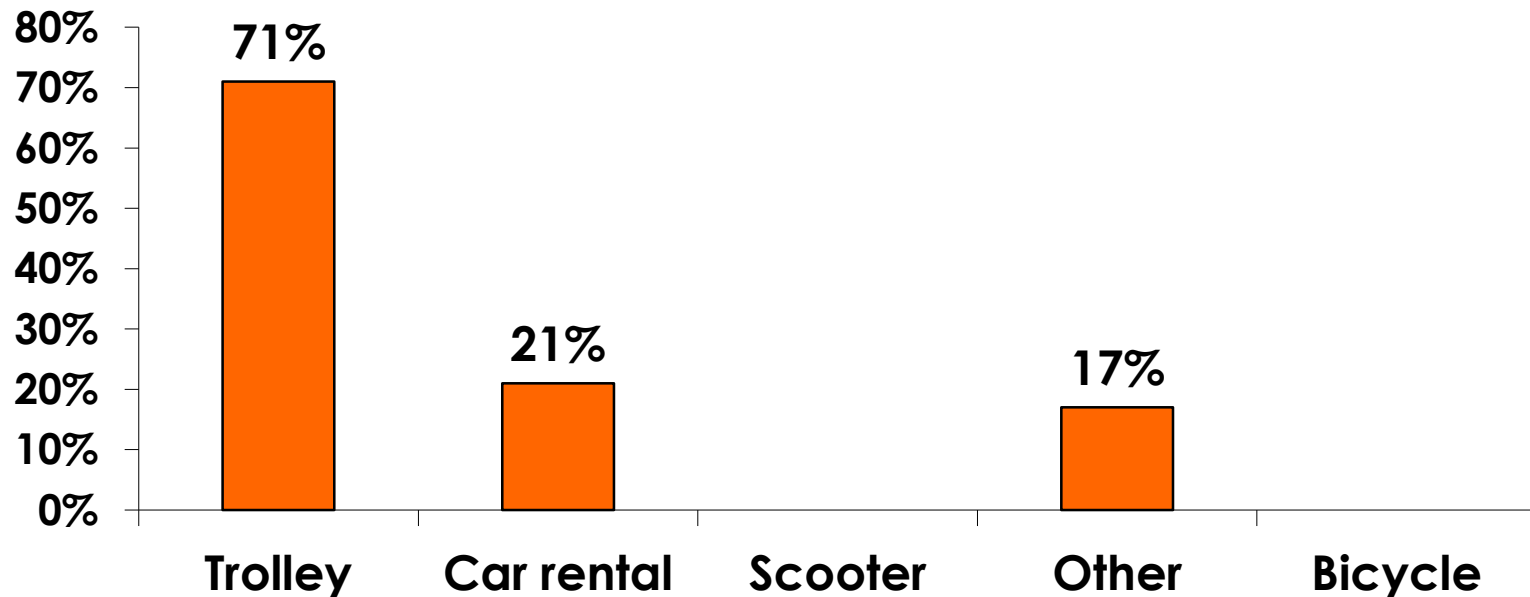
N=1



Mean=\$1,505.00 per travel party

PREPAID GROUND TRANSPORTATION

n=24



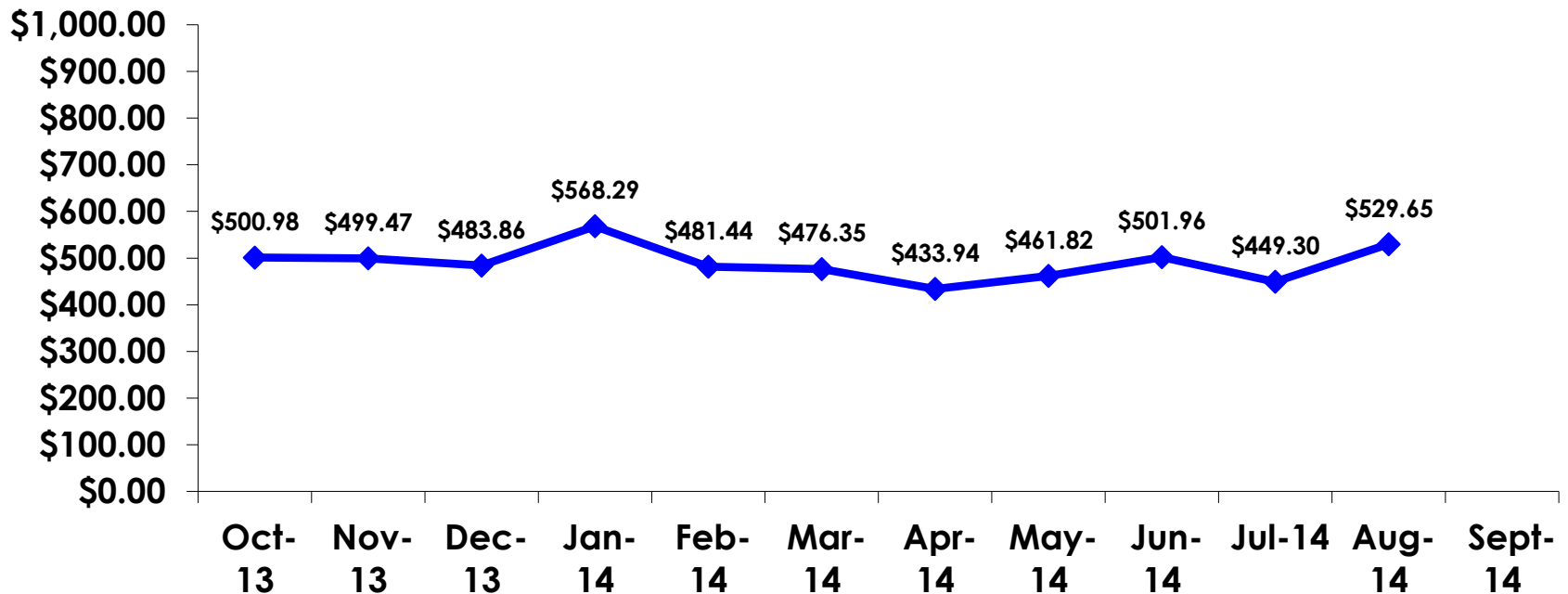
Mean=\$380.16 per travel party

On-Island Expenditures

- \$1,032.60 = 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)
- \$529.65 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

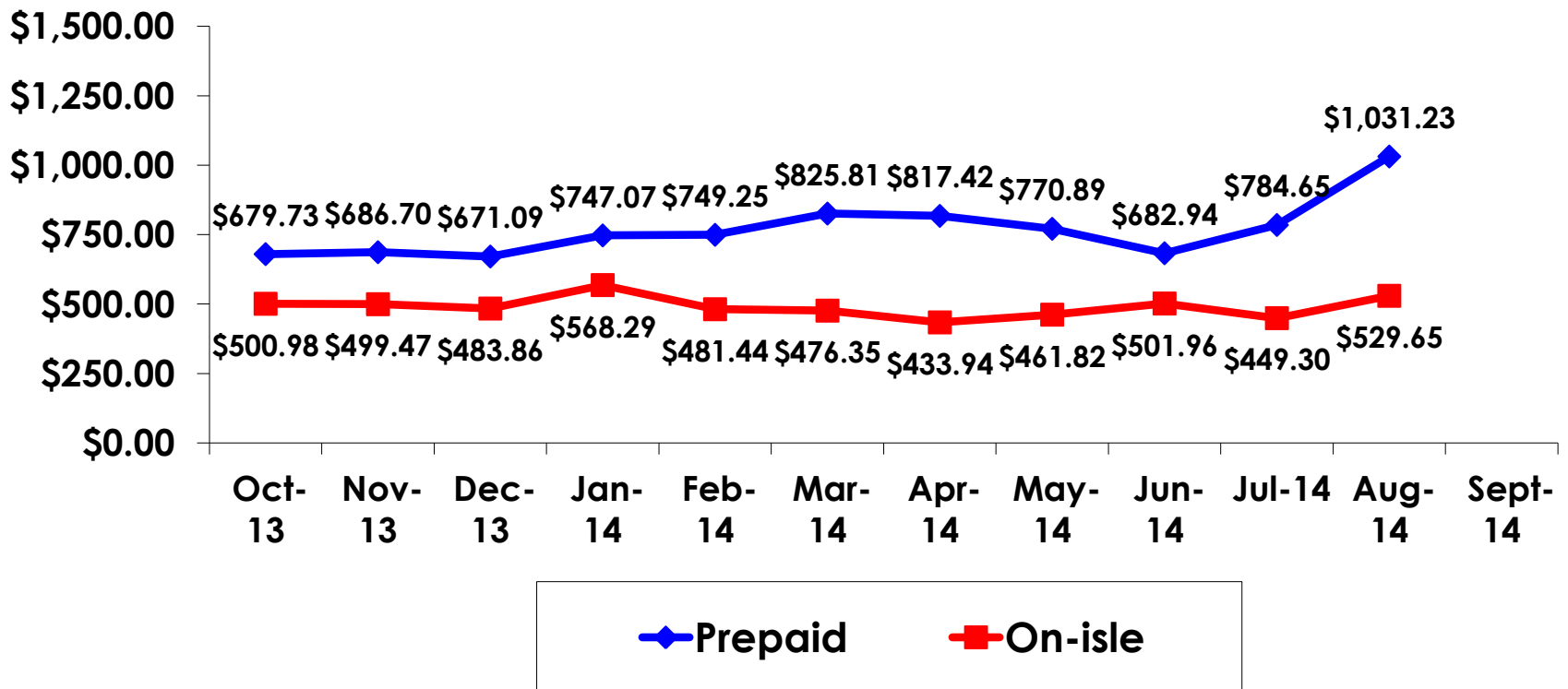


YTD = \$489.74

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$767.98

On-Isle YTD = \$489.74



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
					AGE				AGE			
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$529.65	\$454.90	\$607.45	\$438.33	\$532.18	\$456.66	\$357.80	\$541.73	\$735.95	\$525.46	\$449.00
	Median	\$400	\$347	\$500	\$550	\$500	\$328	\$300	\$400	\$600	\$450	\$180
	Minimum	\$0	\$0	\$0	\$14	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$6,000	\$6,000	\$6,000	\$600	\$1,500	\$6,000	\$1,500	\$4,000	\$6,000	\$1,850	\$1,800

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$74.73	\$103.76	\$44.35	\$20.50	\$27.66	\$114.79	\$164.41
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$54.64	\$52.20	\$57.19	\$44.53	\$63.17	\$55.36	\$47.11
	Median	\$10	\$20	\$0	\$3	\$0	\$20	\$0
F&B RESTRNT	Mean	\$113.56	\$158.23	\$66.81	\$46.85	\$93.46	\$144.70	\$181.76
	Median	\$35	\$100	\$10	\$10	\$30	\$99	\$120
OPT TOUR	Mean	\$103.02	\$129.34	\$75.47	\$68.60	\$79.71	\$115.74	\$189.62
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$100
GIFT- SELF	Mean	\$212.07	\$176.58	\$249.20	\$159.50	\$240.31	\$240.29	\$126.68
	Median	\$50	\$50	\$55	\$18	\$100	\$100	\$50
GIFT- OTHER	Mean	\$132.77	\$122.13	\$143.90	\$89.50	\$181.65	\$111.59	\$152.16
	Median	\$85	\$100	\$60	\$50	\$100	\$55	\$100
TRANS	Mean	\$25.99	\$38.95	\$12.42	\$16.54	\$16.16	\$37.75	\$28.86
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$319.27	\$396.26	\$238.69	\$175.91	\$260.82	\$476.91	\$152.65
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$1,032.60	\$1,179.35	\$879.01	\$621.06	\$945.81	\$1,302.20	\$1,043.24
	Median	\$800	\$1,000	\$620	\$465	\$708	\$1,000	\$1,000

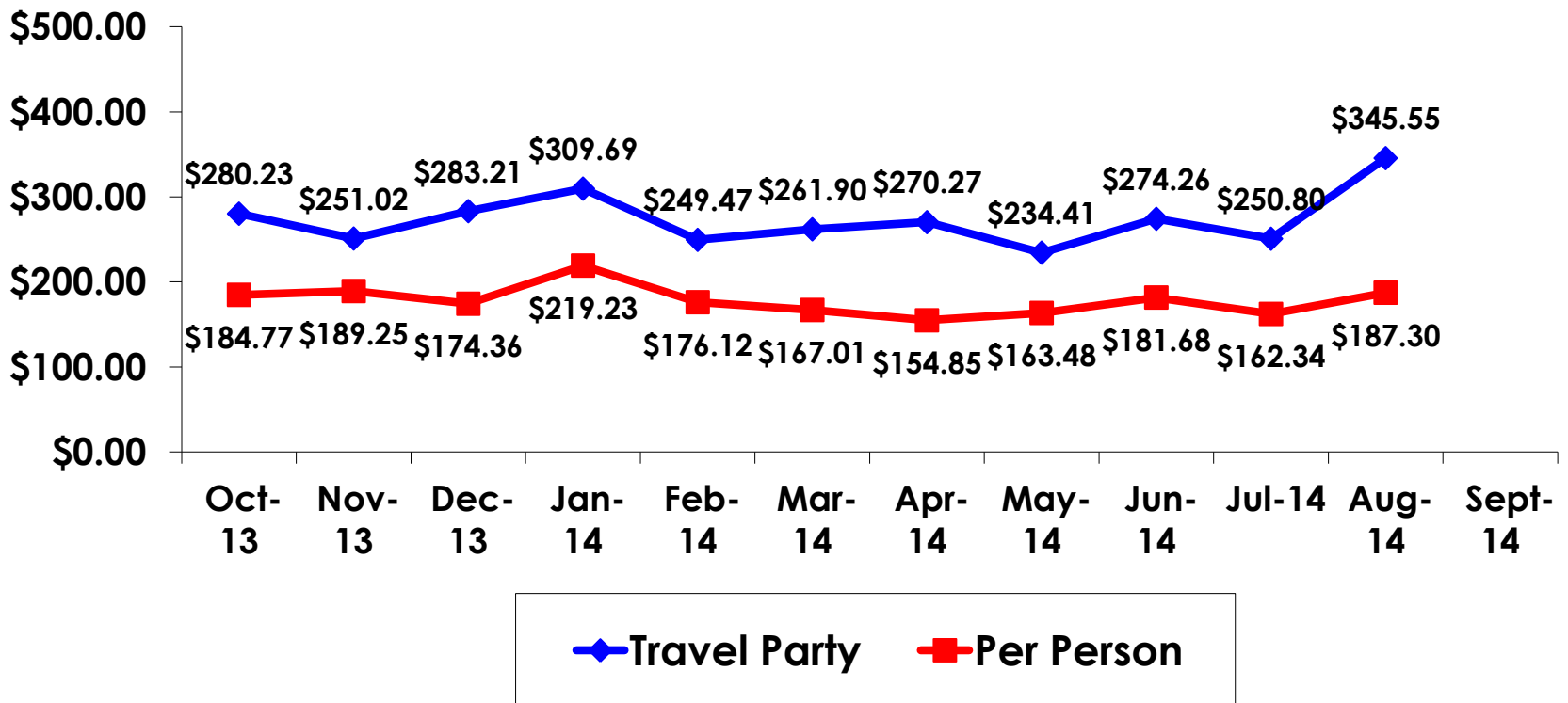
On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$74.73	\$42.80	\$105.78
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$54.64	\$38.34	\$70.50
	Median	\$10	\$1	\$10
F&B RESTRNT	Mean	\$113.56	\$92.26	\$133.66
	Median	\$35	\$30	\$50
OPT TOUR	Mean	\$103.02	\$102.59	\$102.88
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$212.07	\$173.10	\$250.69
	Median	\$50	\$40	\$60
GIFT- OTHER	Mean	\$132.77	\$108.15	\$156.94
	Median	\$85	\$68	\$100
TRANS	Mean	\$25.99	\$16.02	\$35.63
	Median	\$0	\$0	\$0
OTHER	Mean	\$319.27	\$216.58	\$419.02
	Median	\$0	\$0	\$0
TOTAL	Mean	\$1,032.60	\$799.48	\$1,259.08
	Median	\$800	\$600	\$1,000

ON-ISLE EXPENDITURES – Per Day

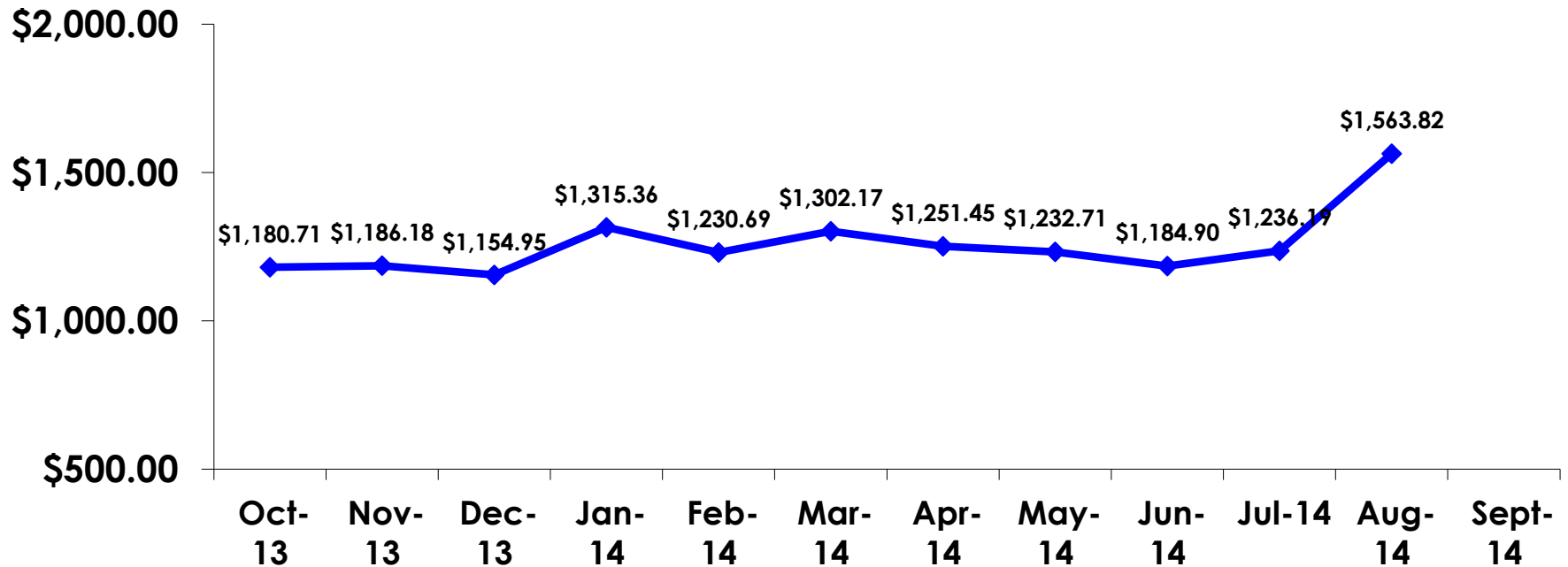
Travel Party YTD = \$273.74 Per Person YTD = \$178.21



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,563.82 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,020 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



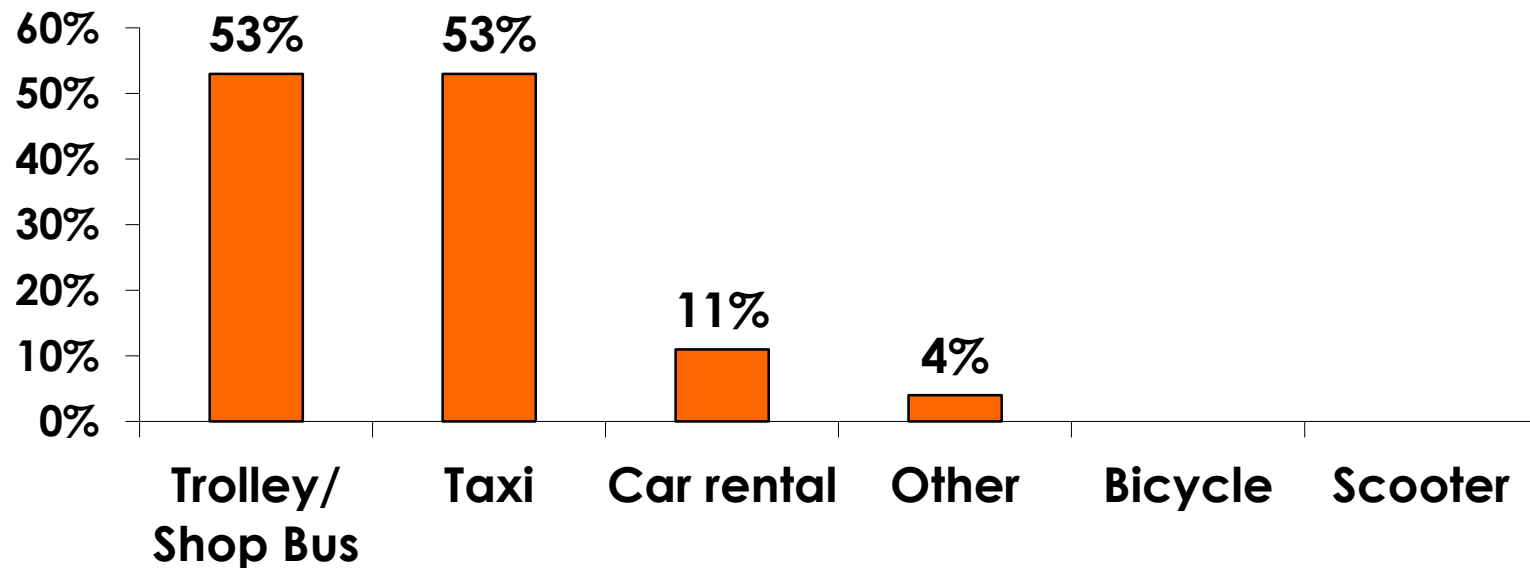
YTD=\$1,258.15

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$74.73
Food & beverage in fast food restaurant/convenience store	\$54.64
Food & beverage at restaurants or drinking establishments outside a hotel	\$113.56
Optional tours and activities	\$103.02
Gifts/ souvenirs for yourself/companions	\$212.07
Gifts/ souvenirs for friends/family at home	\$132.77
Local transportation	\$25.99
Other expenses not covered	\$319.27
Average Total	\$1,032.60

Local Transportation

n=76



Mean=\$25.99 per travel party

Guam Airport Expenditures

- \$41.35 = Mean
- \$10 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

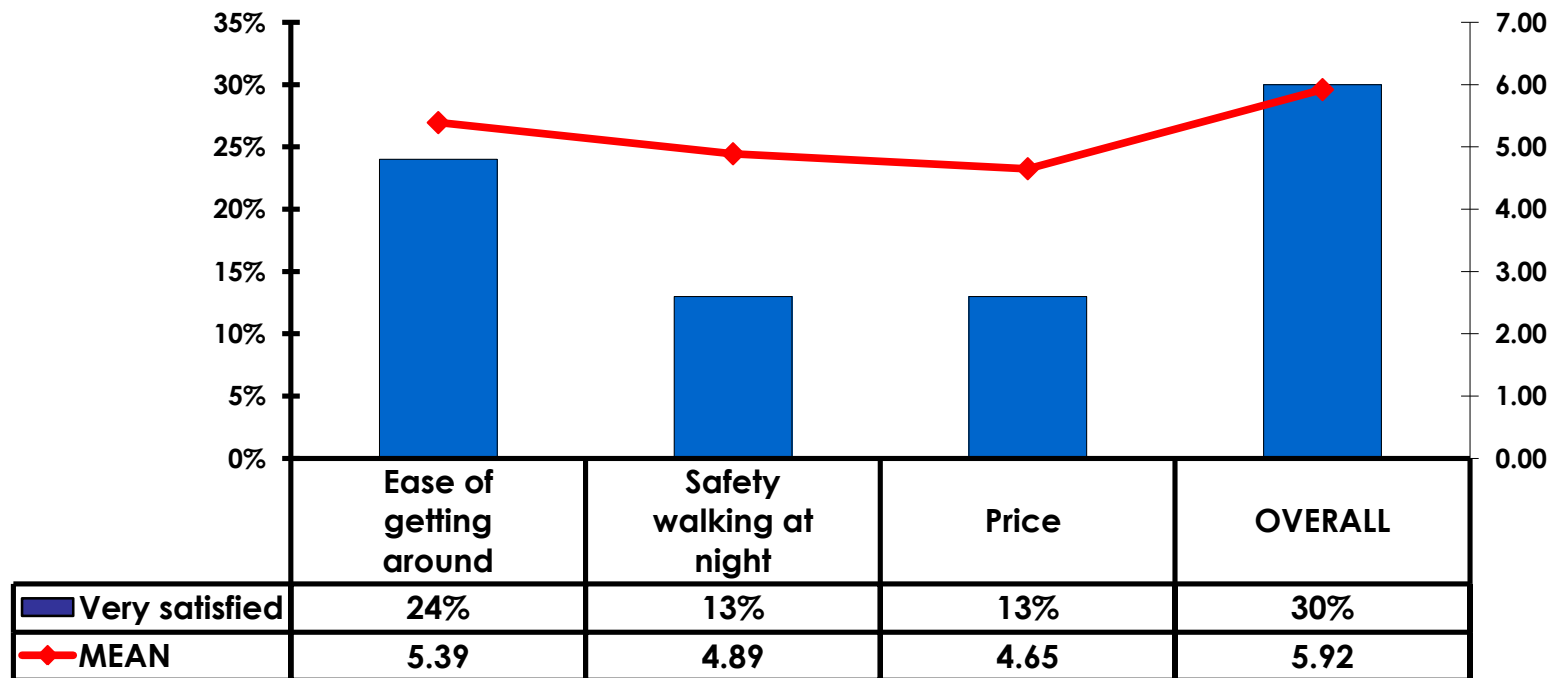
	MEAN \$
Food & Beverages	\$11.21
Gifts/Souvenirs Self	\$9.50
Gifts/Souvenirs Others	\$20.41
Total	\$41.35

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

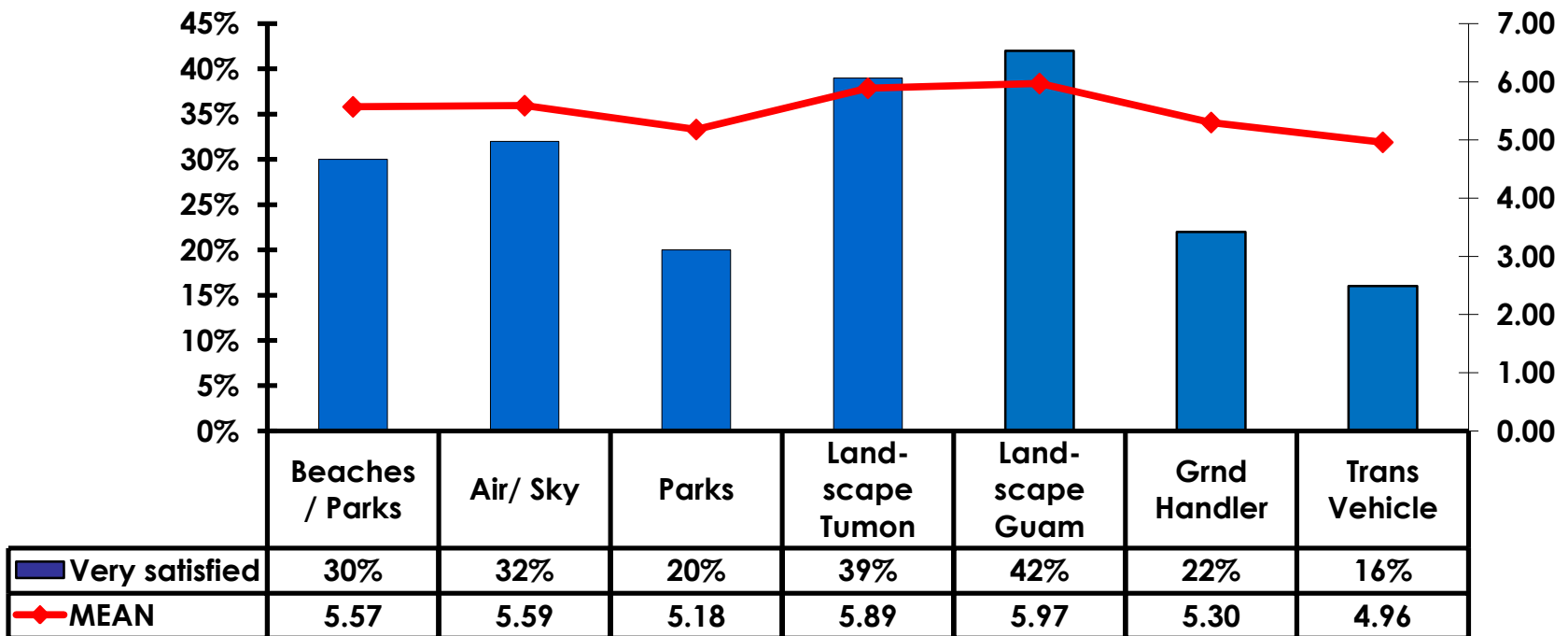
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

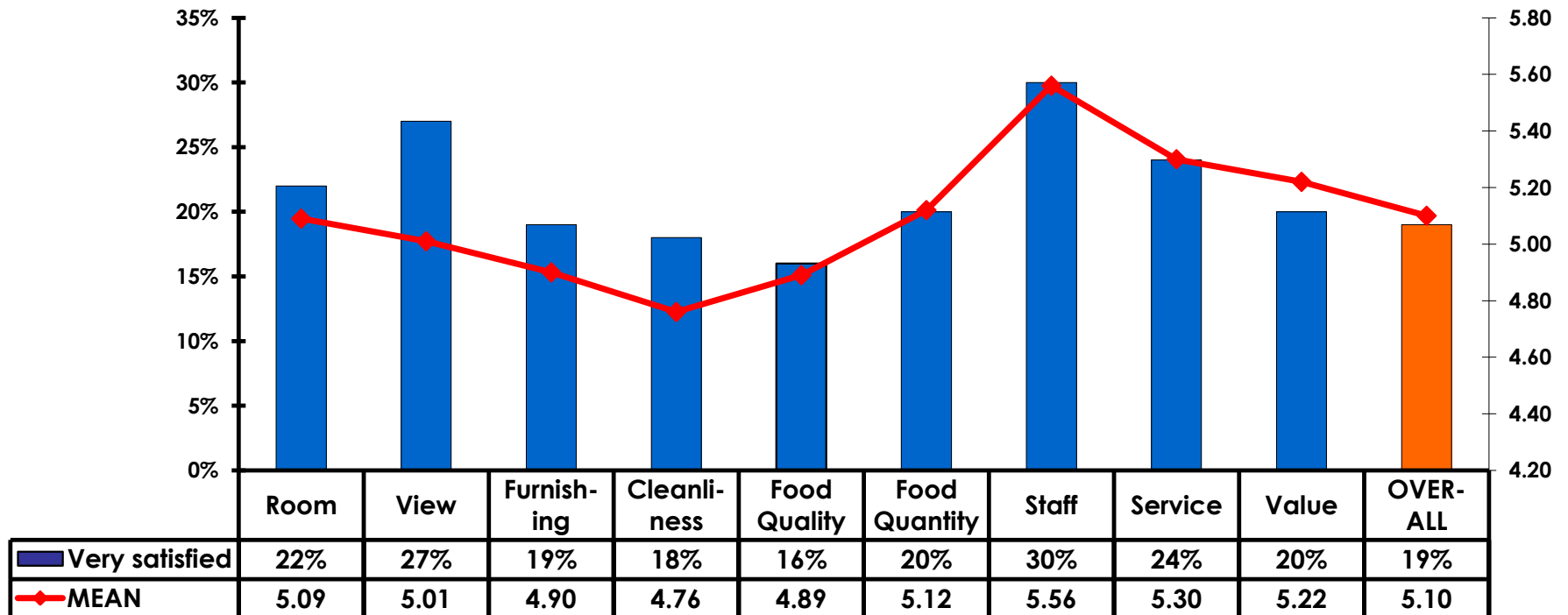
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

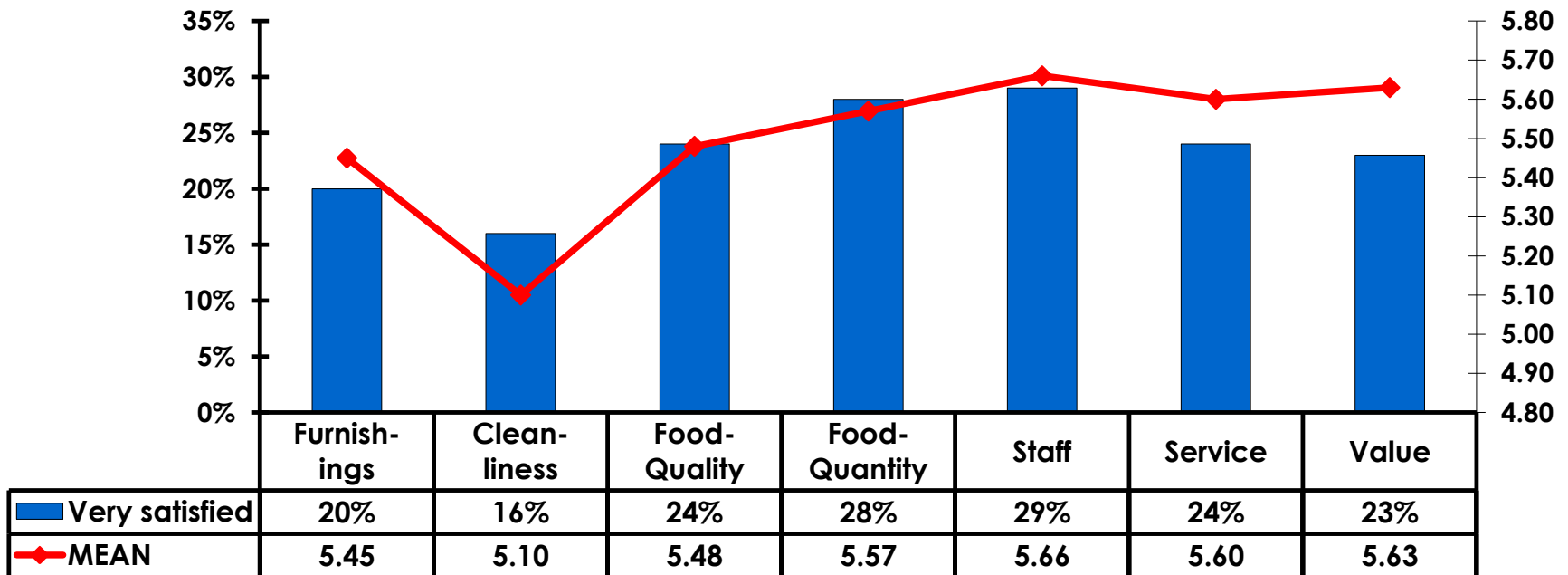
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

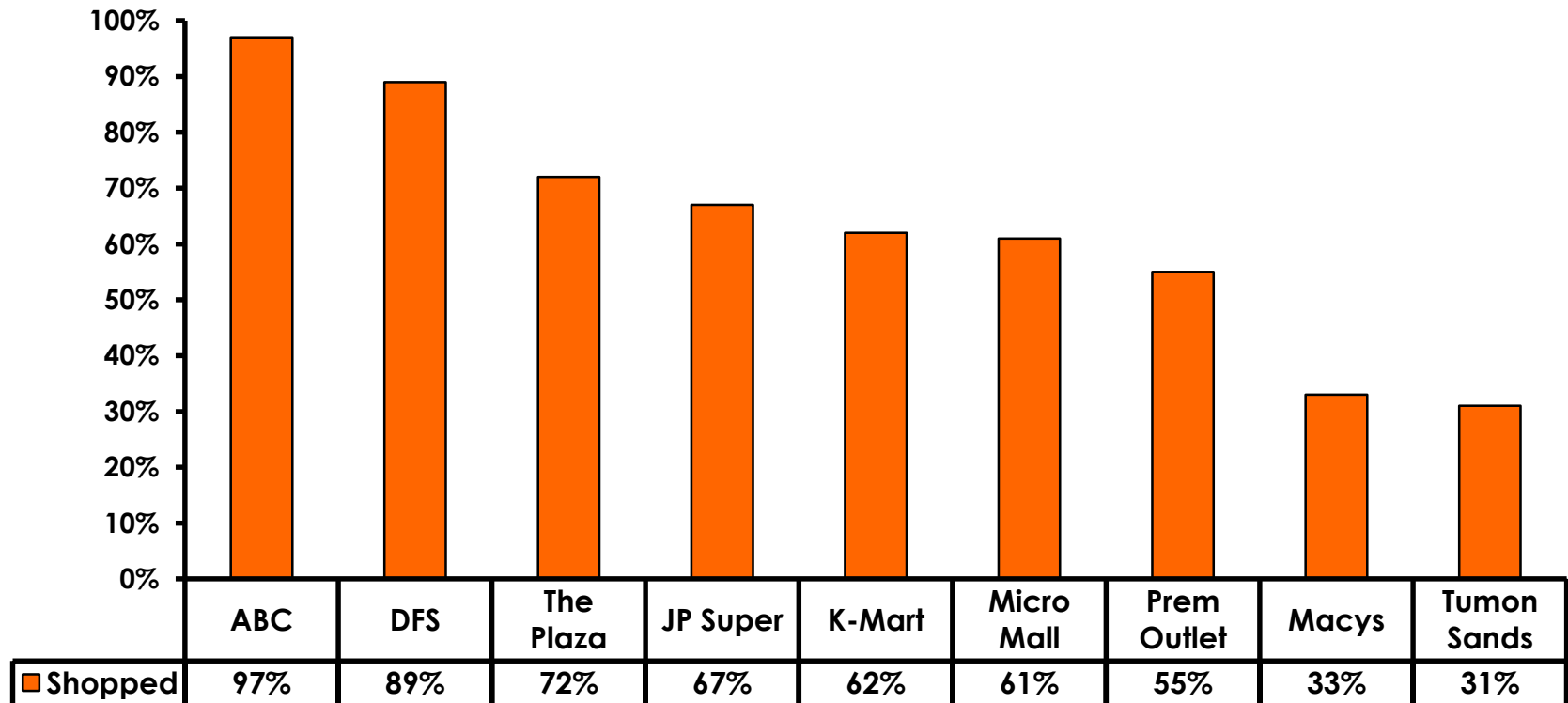
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

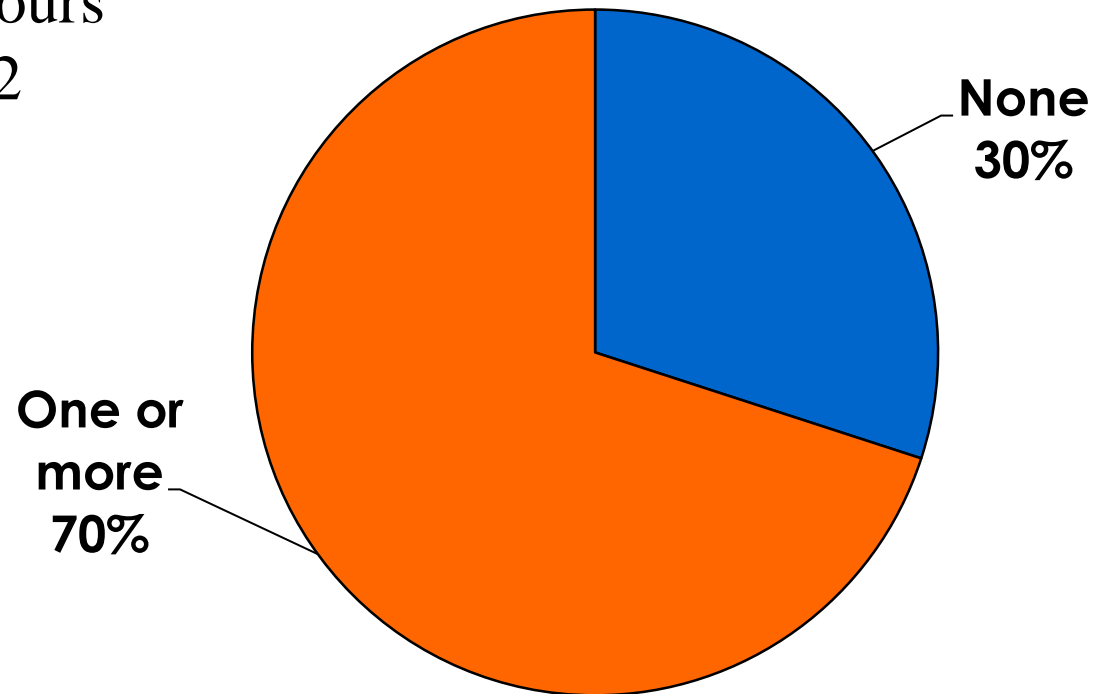
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

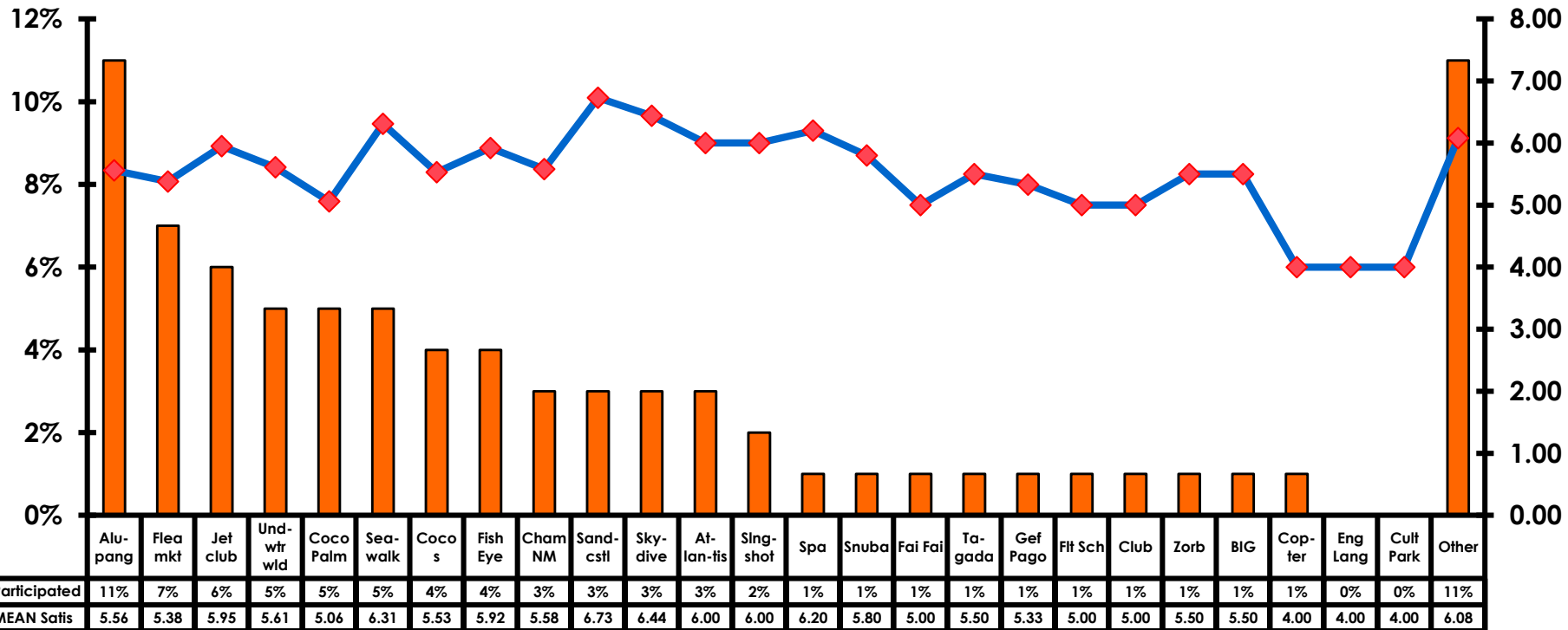
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 56%	Score of 6 to 7 = 54%
Score of 4 to 5 = 39%	Score of 4 to 5 = 40%
Score 1 to 3 = 4%	Score 1 to 3 = 6%
MEAN = 5.53	MEAN = 5.46

Optional Tour Participation

- Average number of tours participated in is 1.32



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 = 37%	Score of 4 to 5 = 39%
Score 1 to 3 = 6%	Score 1 to 3 = 3%
MEAN = 5.49	MEAN = 5.52

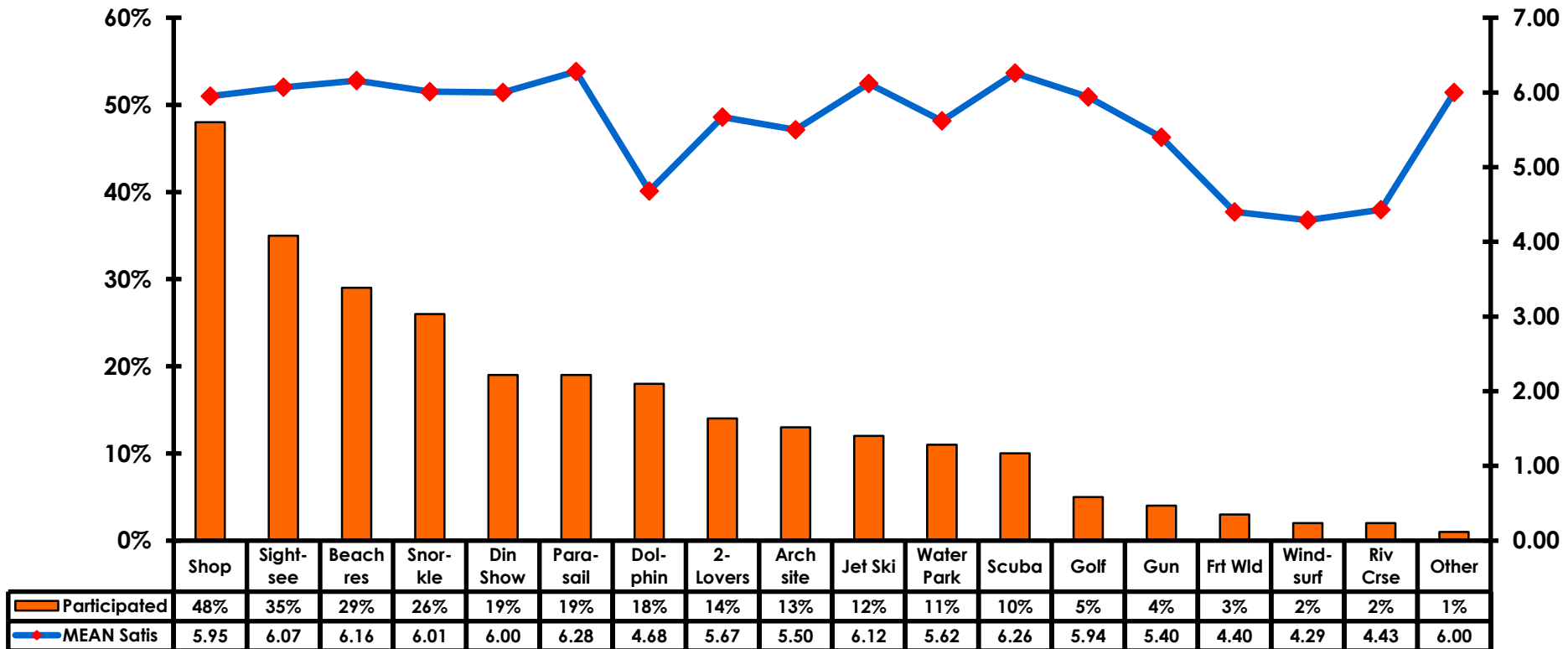
Night Tours Satisfaction

7pt Rating Scale

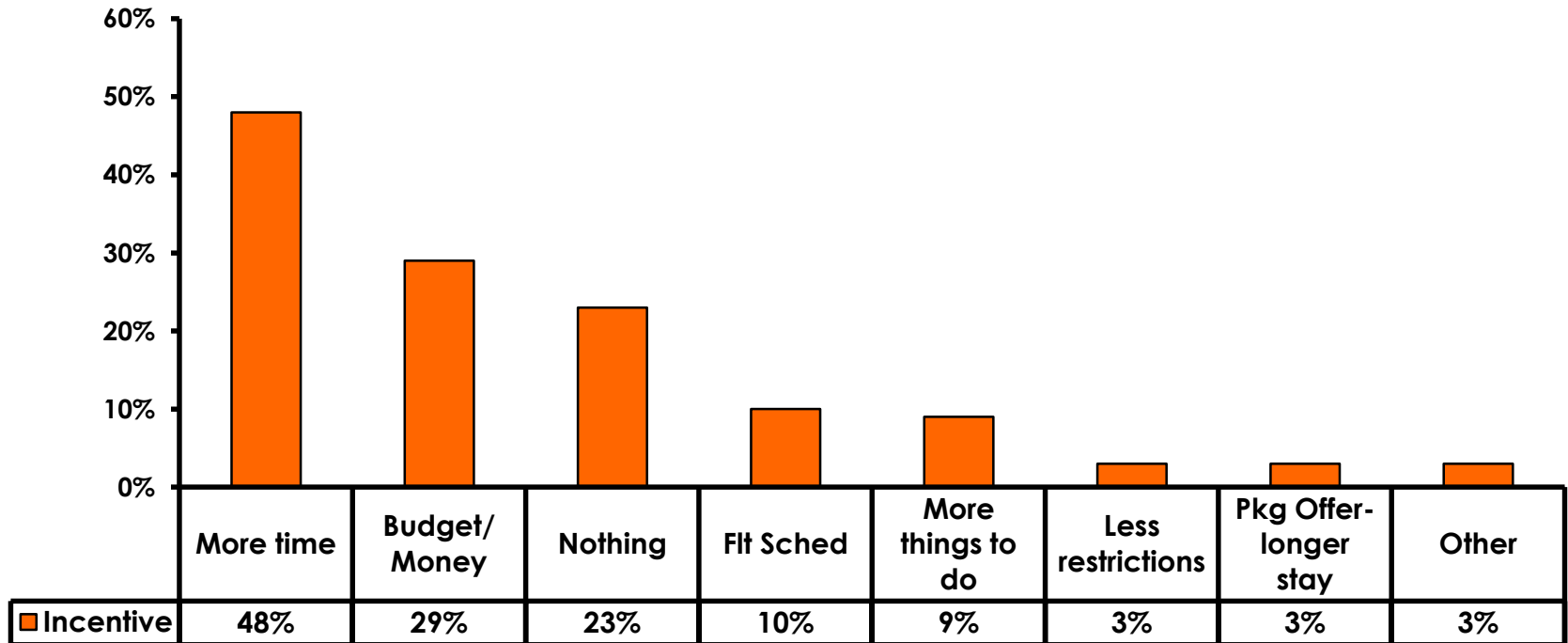
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 30%	Score of 6 to 7 = 32%
Score of 4 to 5 = 67%	Score of 4 to 5 = 66%
Score 1 to 3 = 3%	Score 1 to 3 = 3%
MEAN = 4.88	MEAN = 4.87

Satisfaction with Other Activities



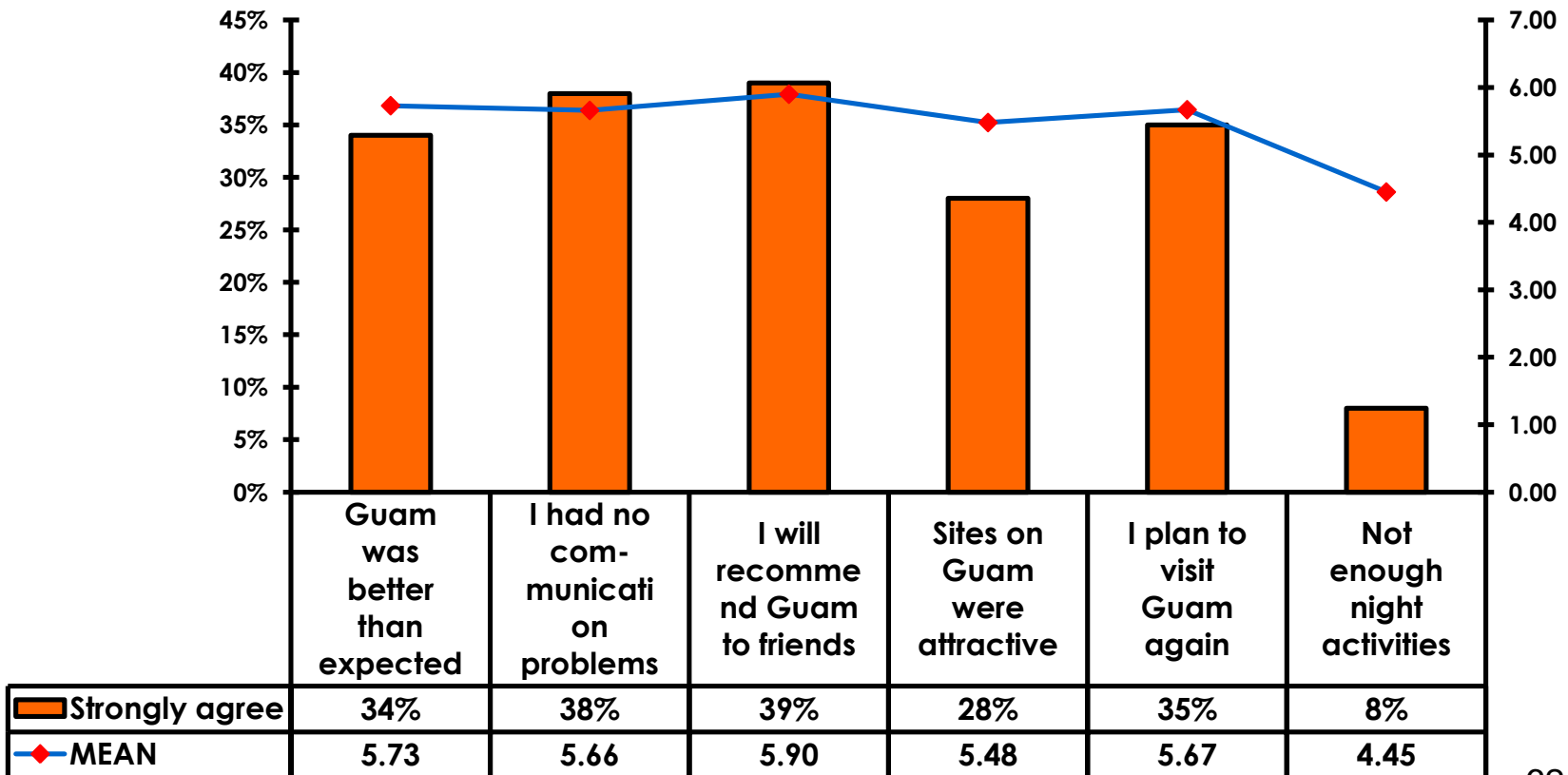
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

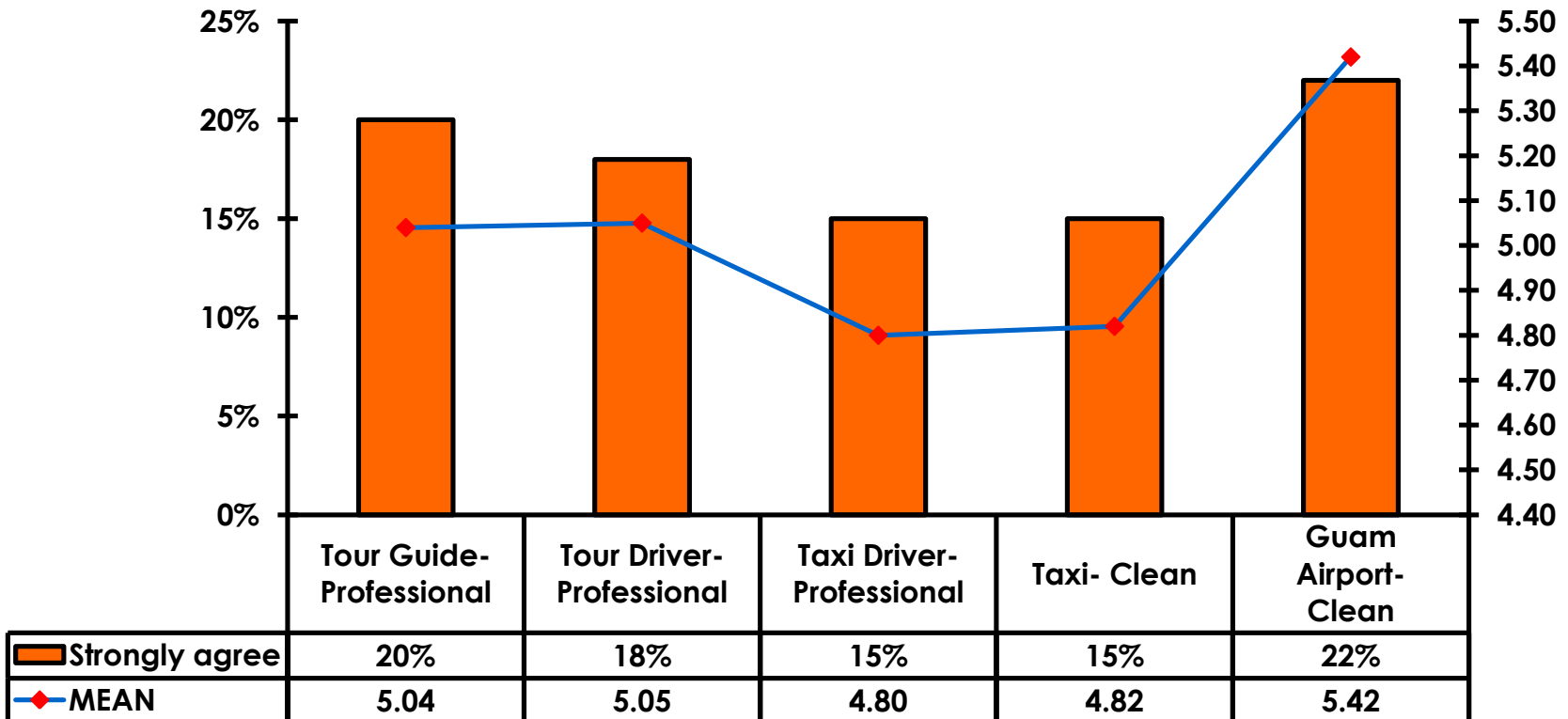
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

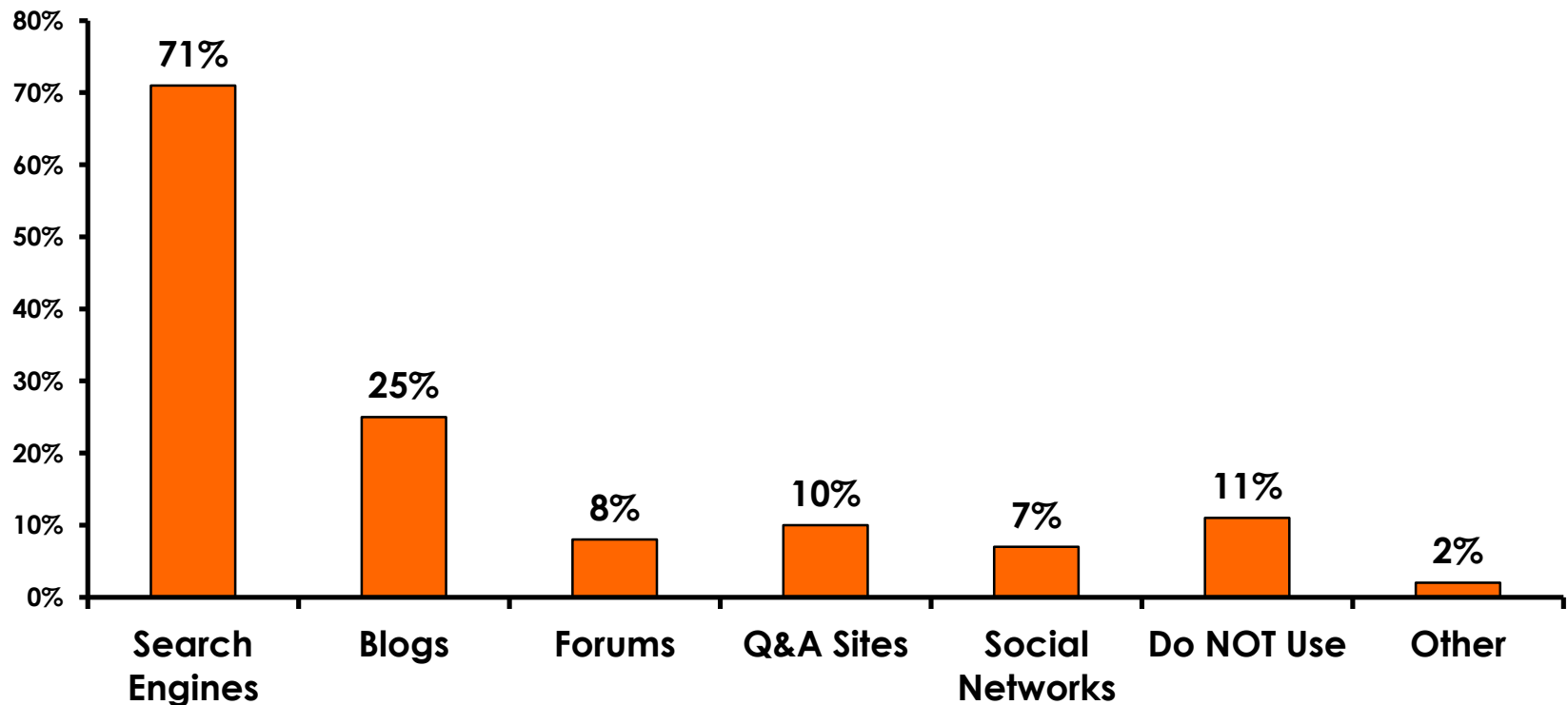
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



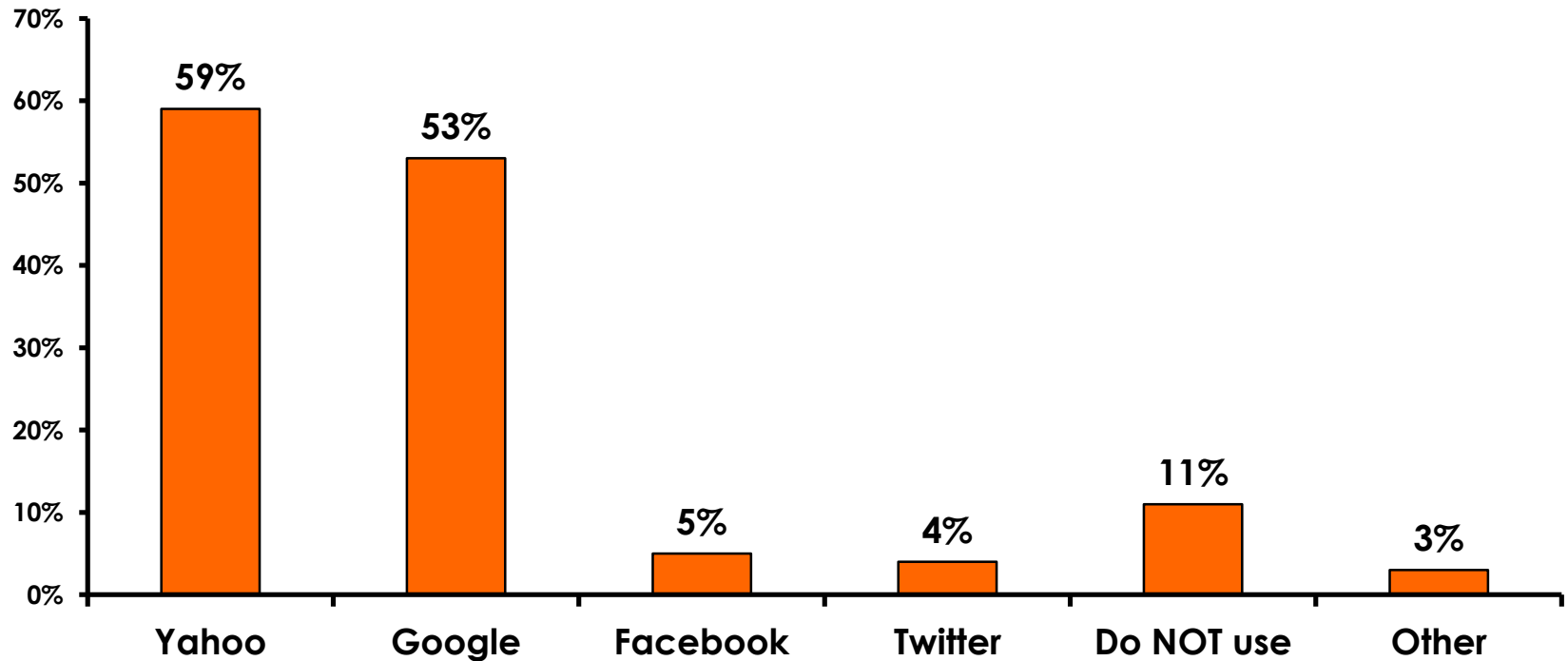
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

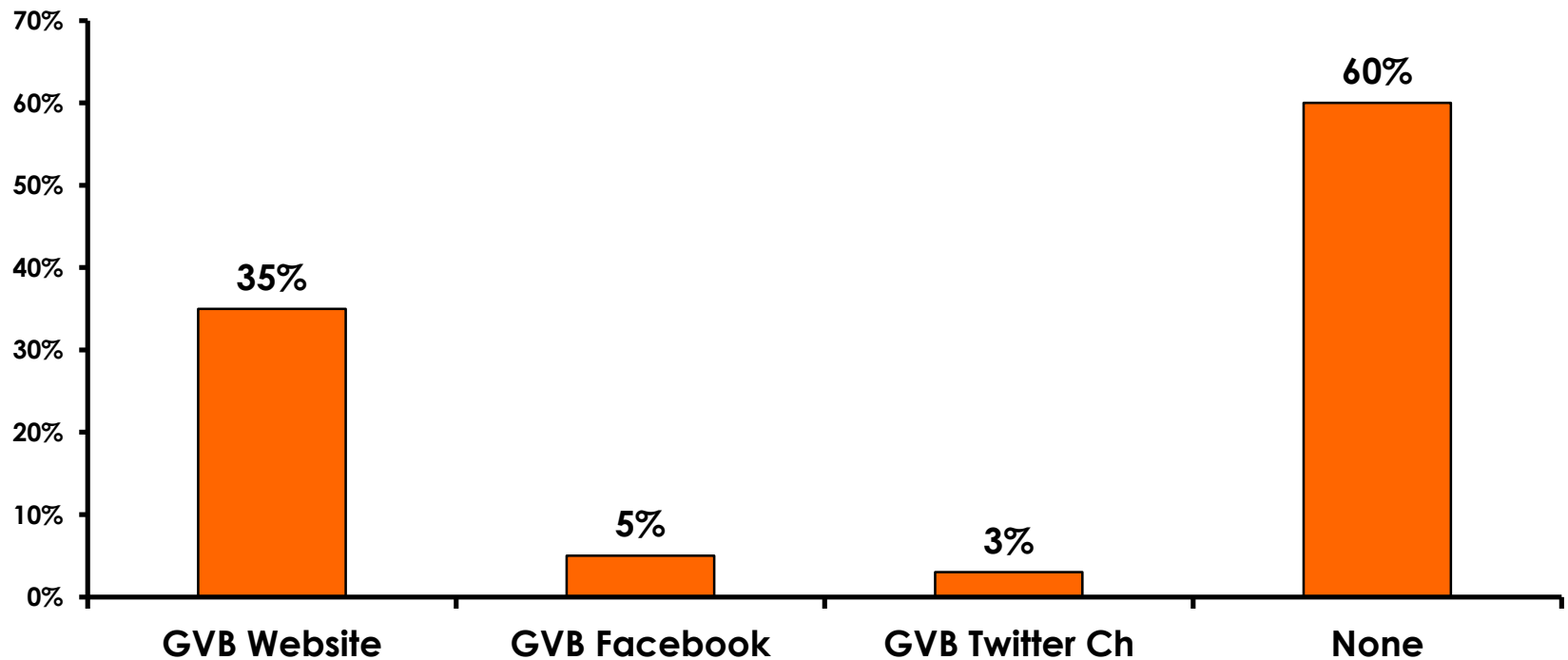


Internet- Things To Do

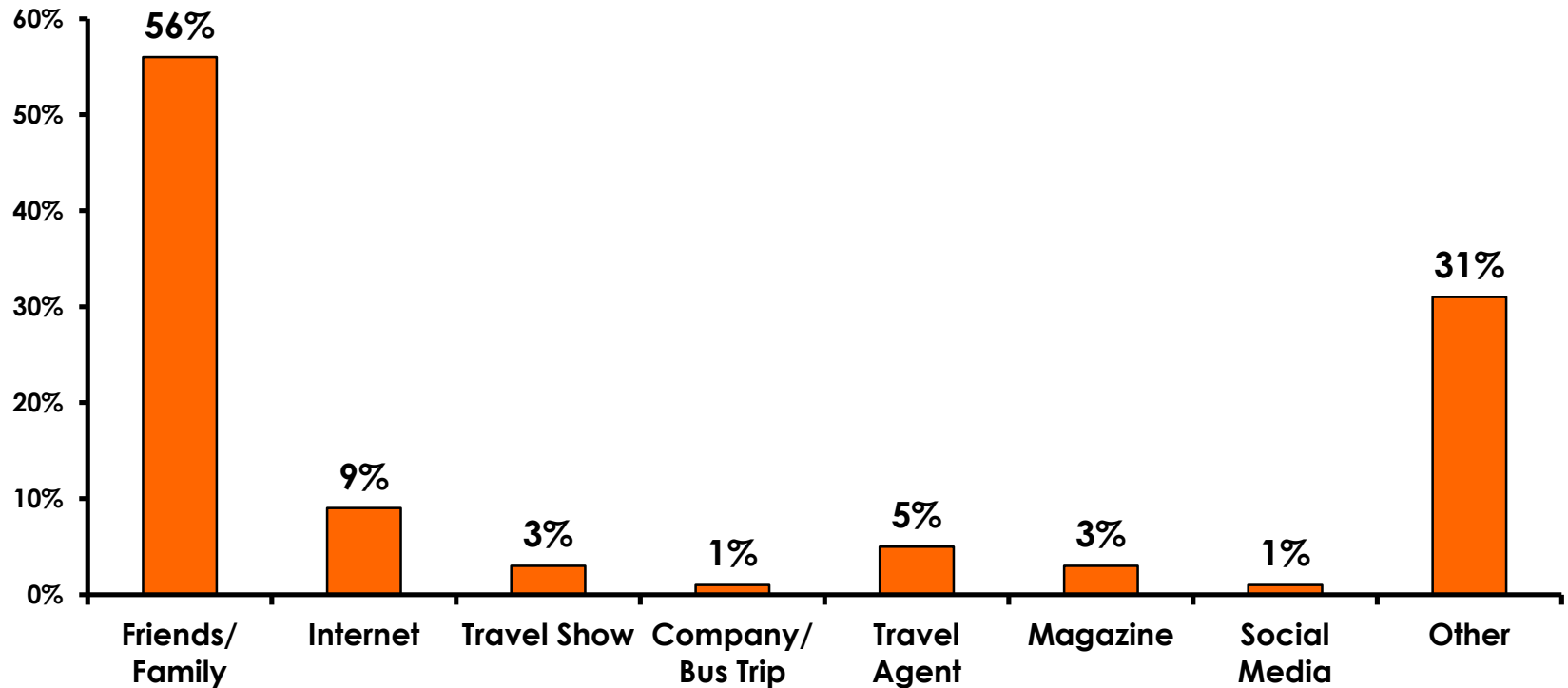
Sources of Info



Internet- GVB Sources

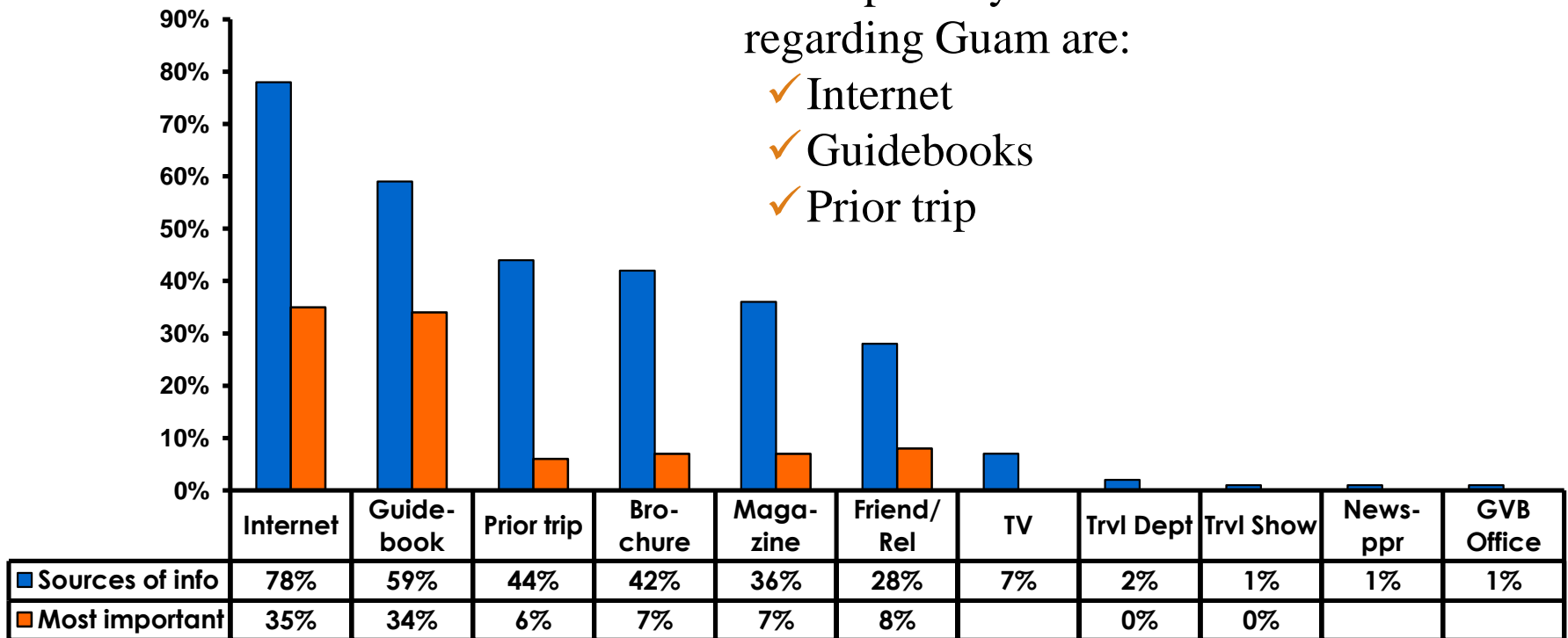


Travel Motivation- Info Sources



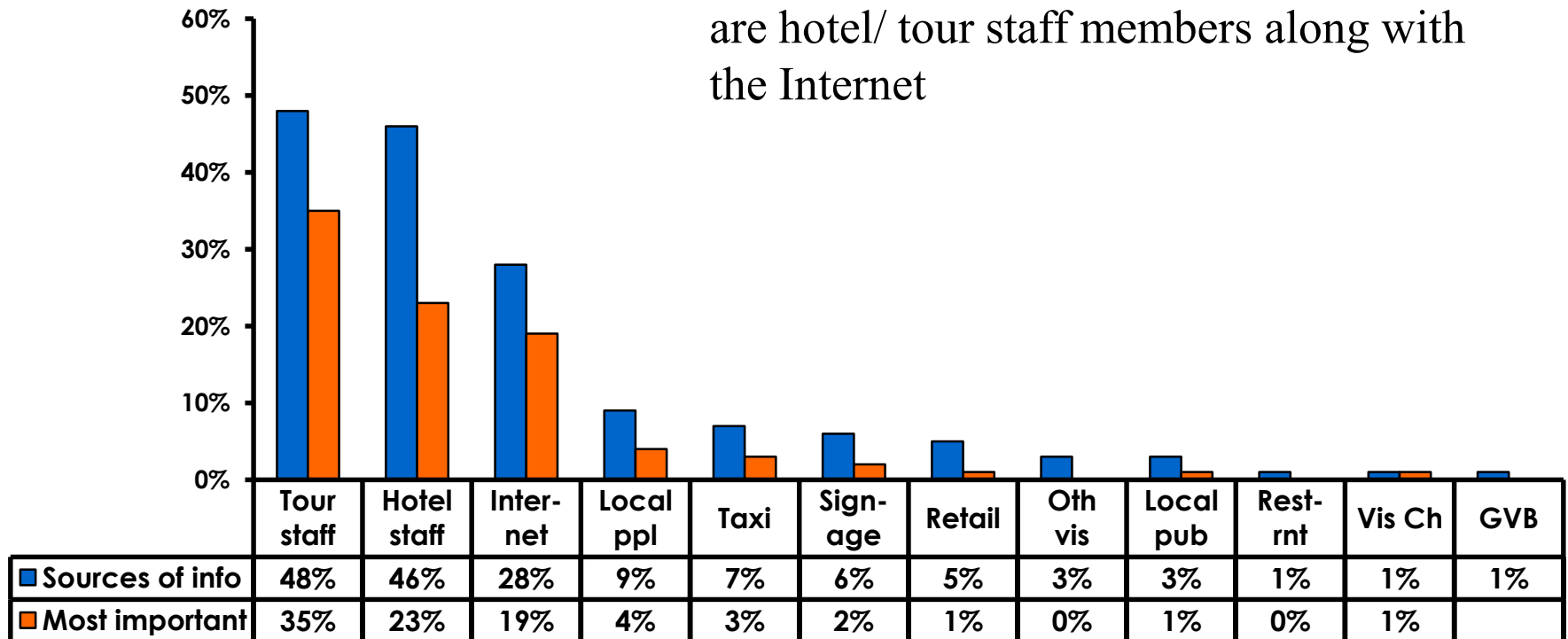
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

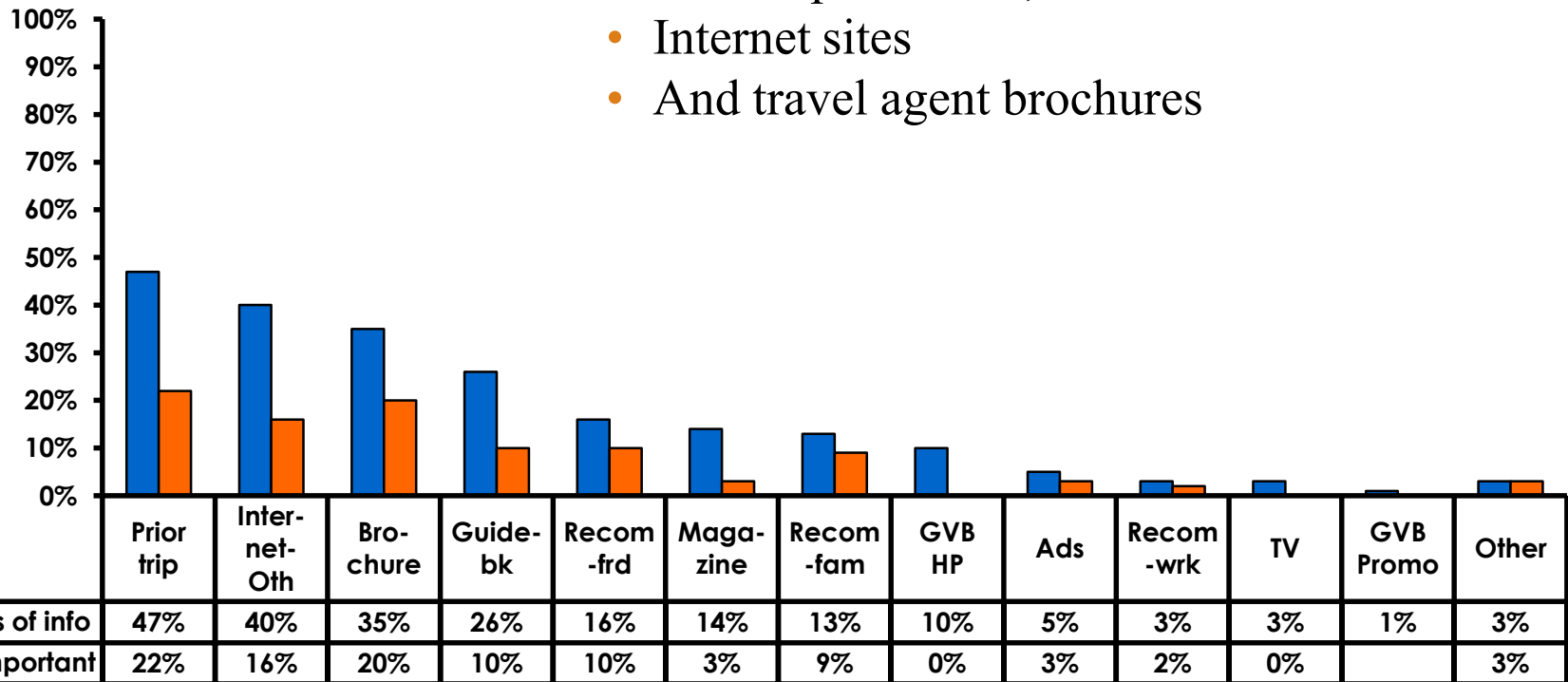
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

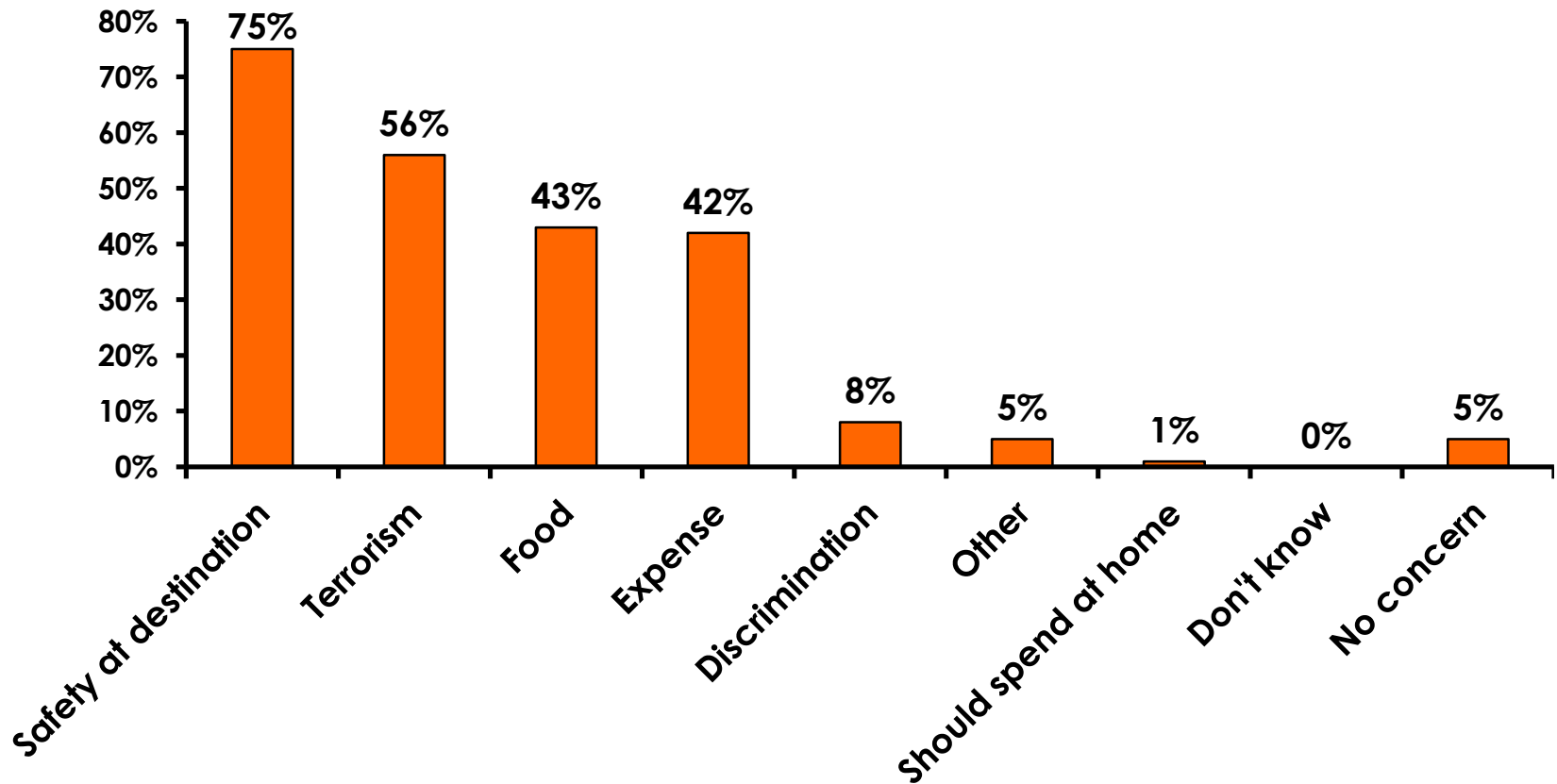
The primary motivational sources of information are

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



SECTION 6 **OTHER ISSUES**

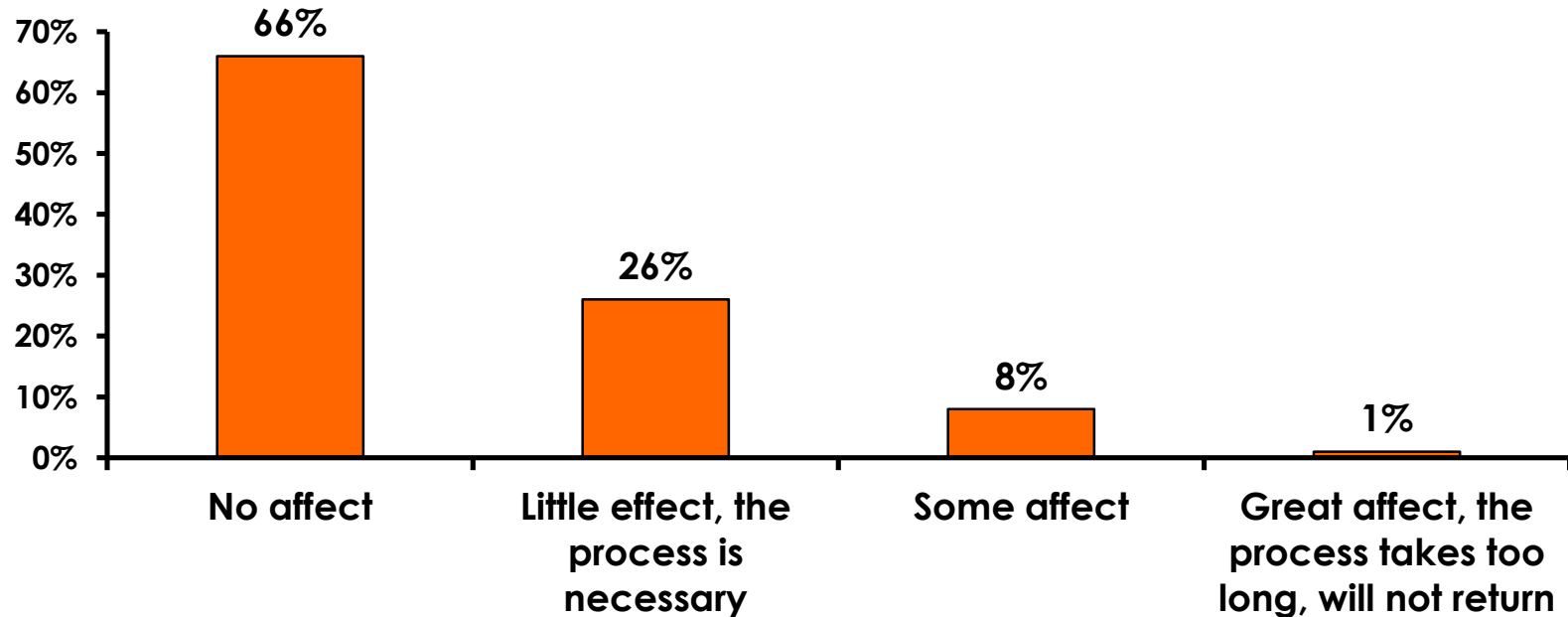
Concerns about travel outside of Japan - Overall



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%	74%	69%	75%	89%	55%	79%	66%	69%	79%	81%	75%	78%	
	Terrorism	56%	53%	59%	55%	51%	55%	45%	56%	63%	66%	46%	52%	44%	
	Food	43%	47%	45%	41%	38%	45%	42%	44%	42%	47%	38%	42%	67%	
	Expense	42%	43%	48%	36%	46%	36%	47%	41%	42%	48%	38%	41%	44%	
	Discrimination against Japanese	8%	10%	6%	7%	14%	9%	5%	6%	4%	10%	4%	11%	22%	
	No concerns	5%	6%	5%	6%	3%	9%	3%	16%	2%	3%	8%	5%		
	Other	5%	3%	9%	3%	5%	9%	11%		8%	5%	4%	5%		
	Should spend at home	1%	6%	1%			9%	3%				2%		22%	
	Don't know	0%			1%										
	Total	Count	351	68	108	137	37	11	38	32	52	62	52	83	9

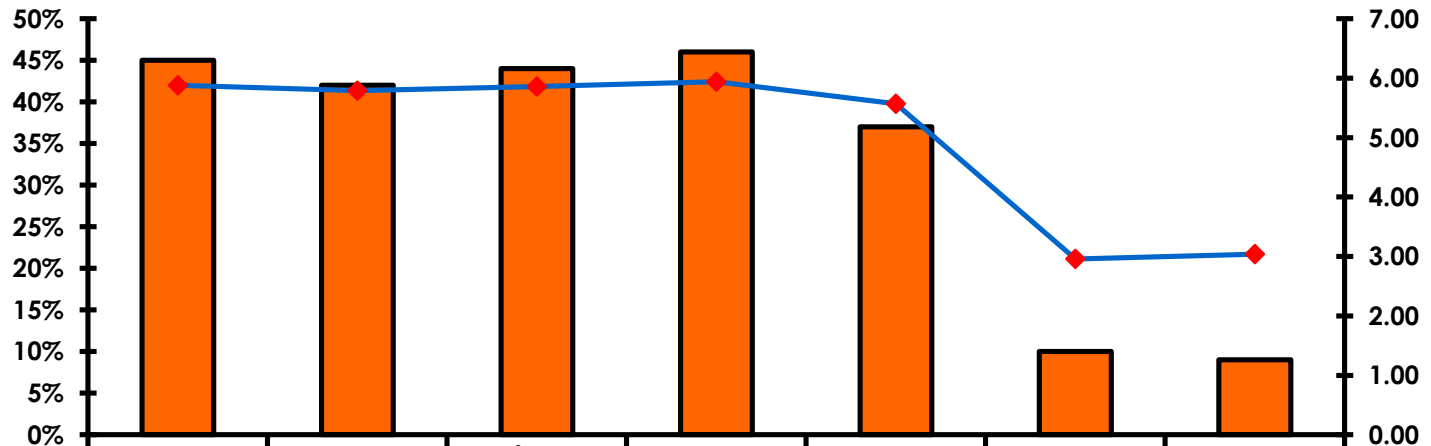
Security Screening/ Immigration Process at Guam International Airport





Airport Screening

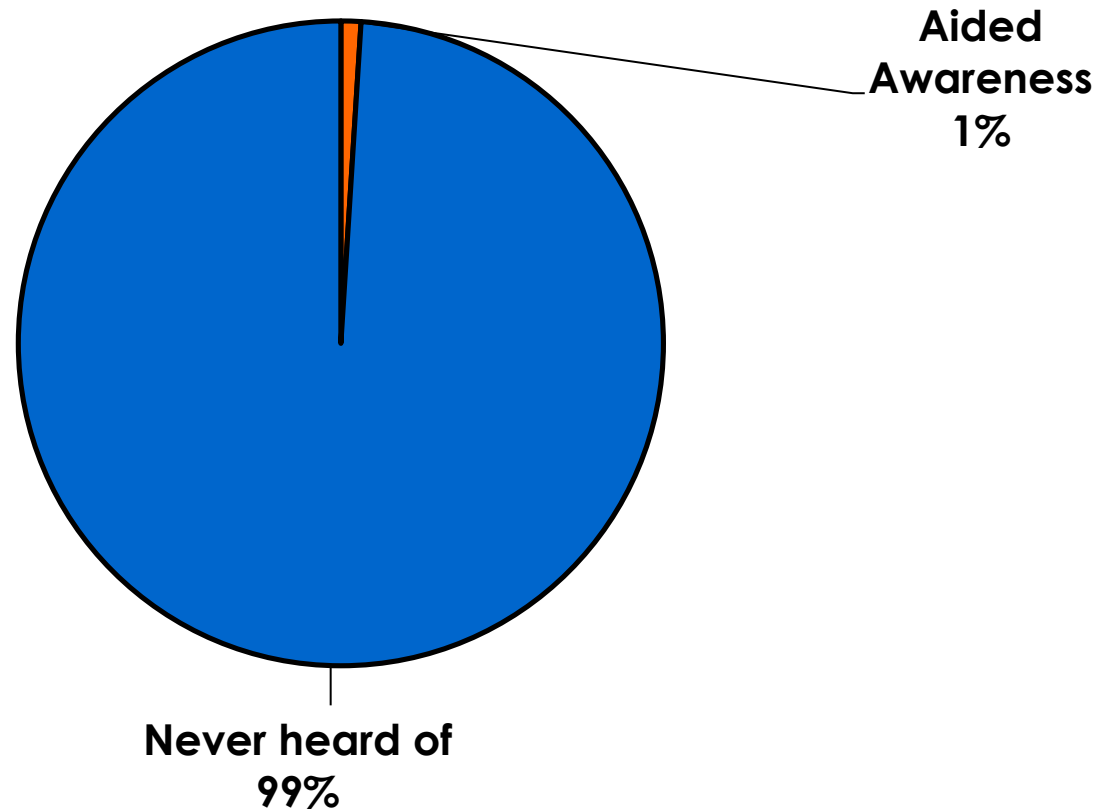
7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



 Strongly agree	45%	42%	44%	46%	37%	10%	9%
 MEAN	5.88	5.79	5.86	5.94	5.57	2.96	3.04

Shop Guam Festival



Shop Guam Festival - Impact

n=4

