



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2014 DATA AGGREGATION



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 **4208** 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 **4208** is +/- 1.51 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 +/- 1.51 percentage points.

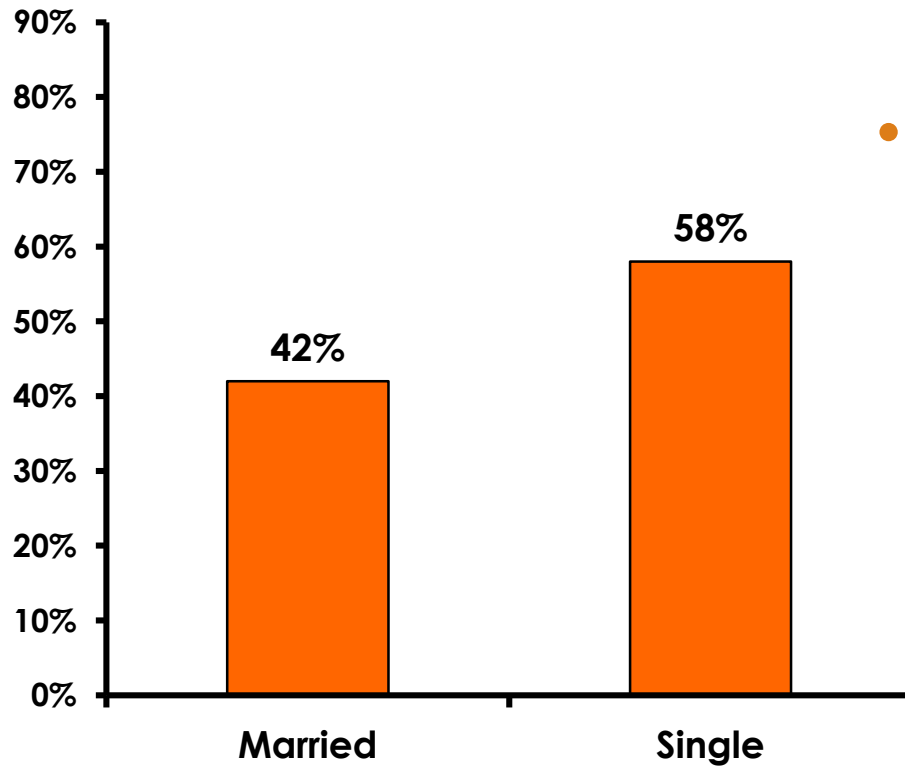
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# OBJECTIVES

- 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.

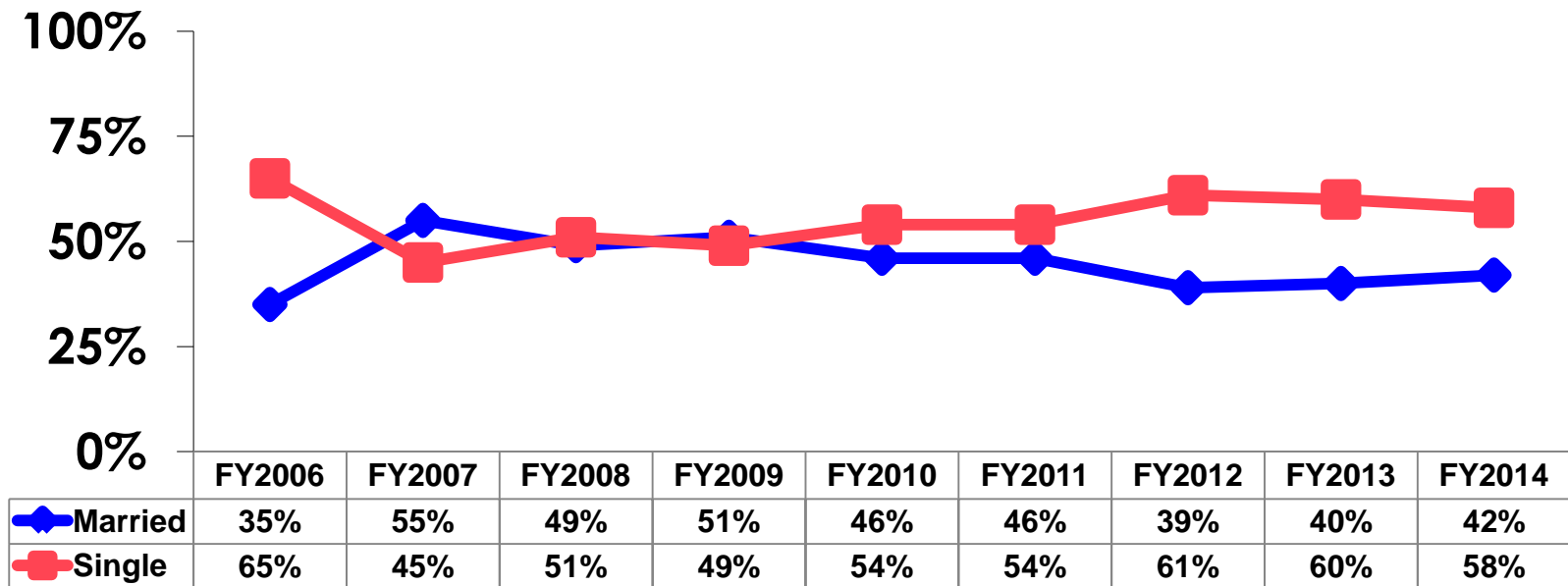
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

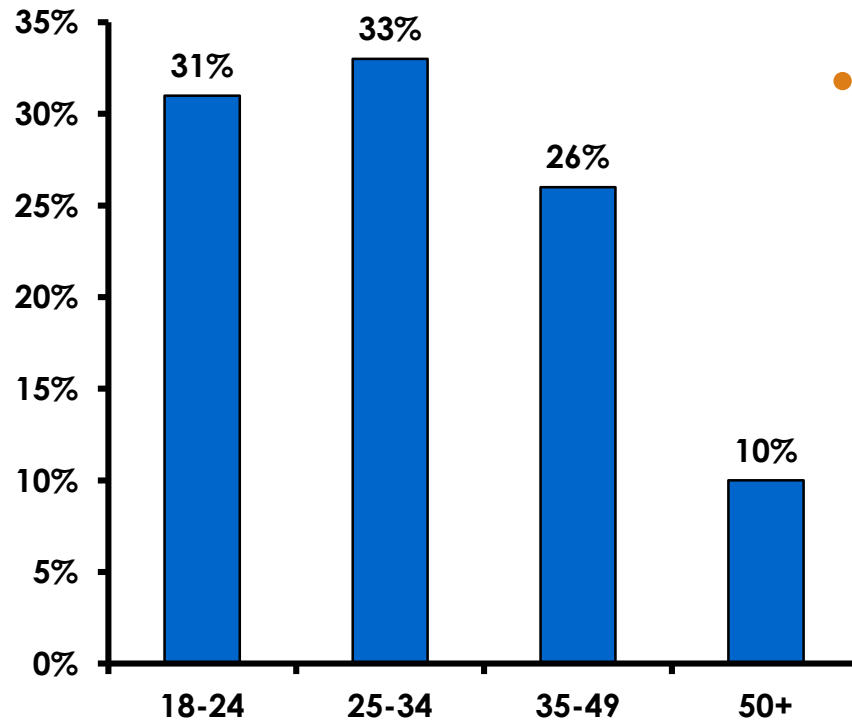


- 67% of first-time visitors are single.

# MARITAL STATUS

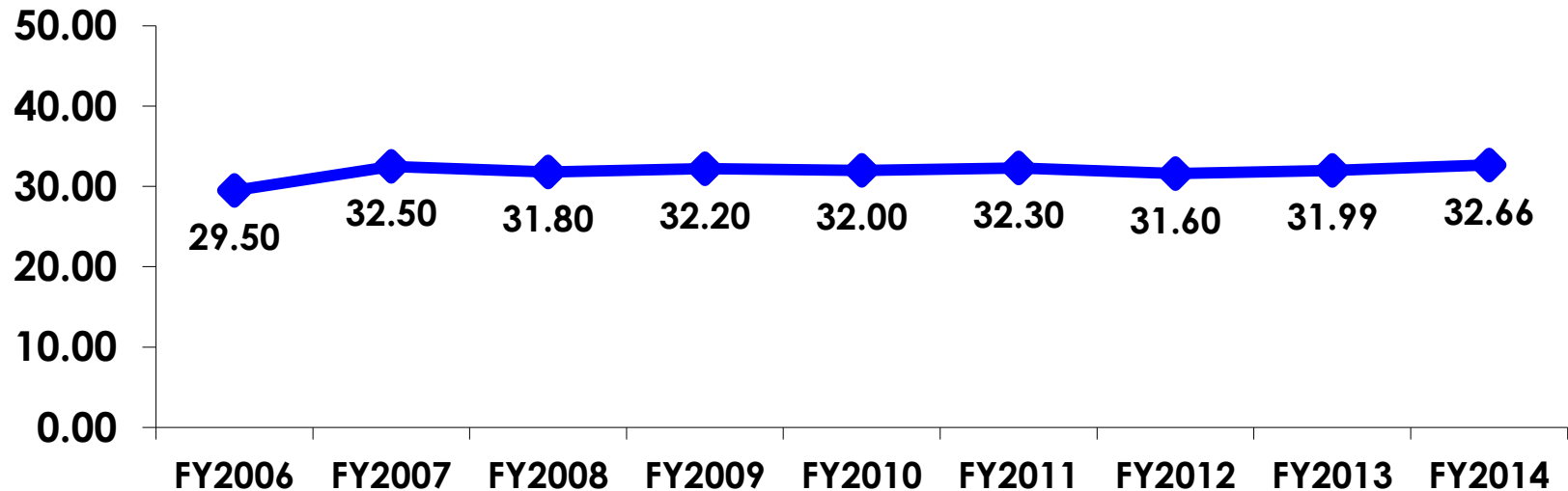


# Age - Overall



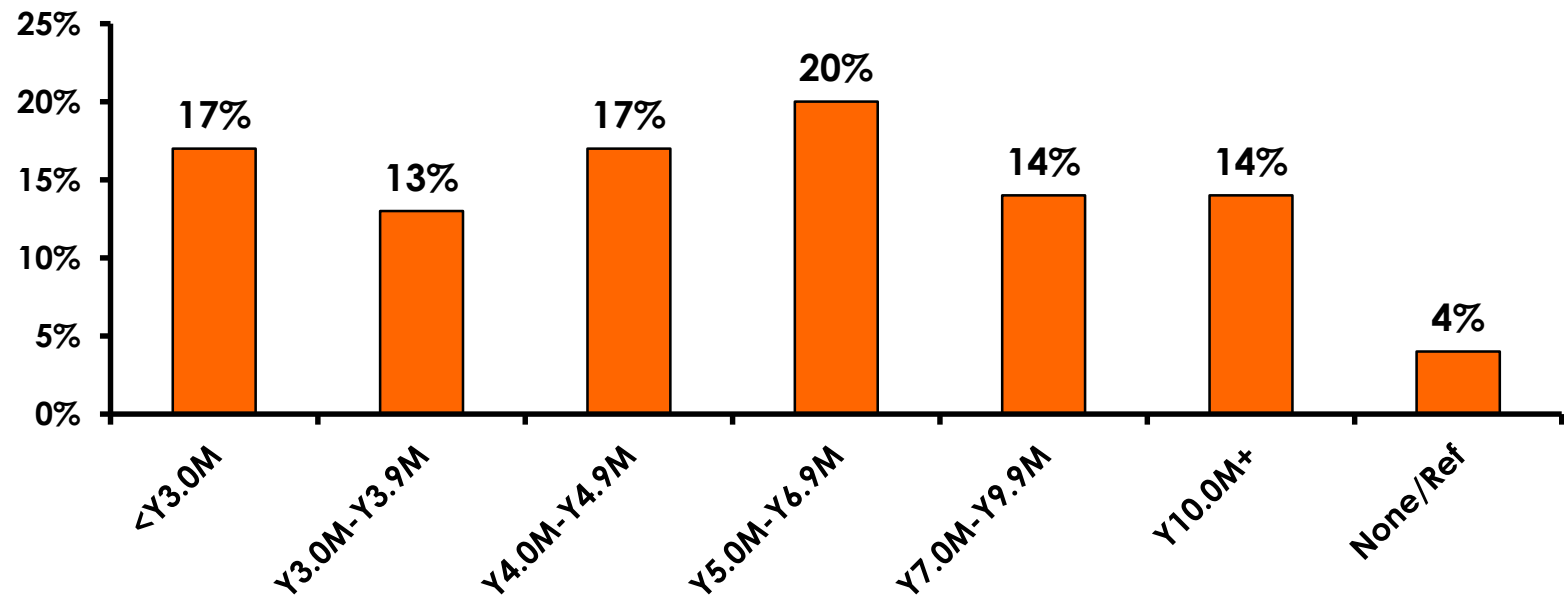
- The average age of the respondents is 32.66 years of age.

# AVERAGE - AGE





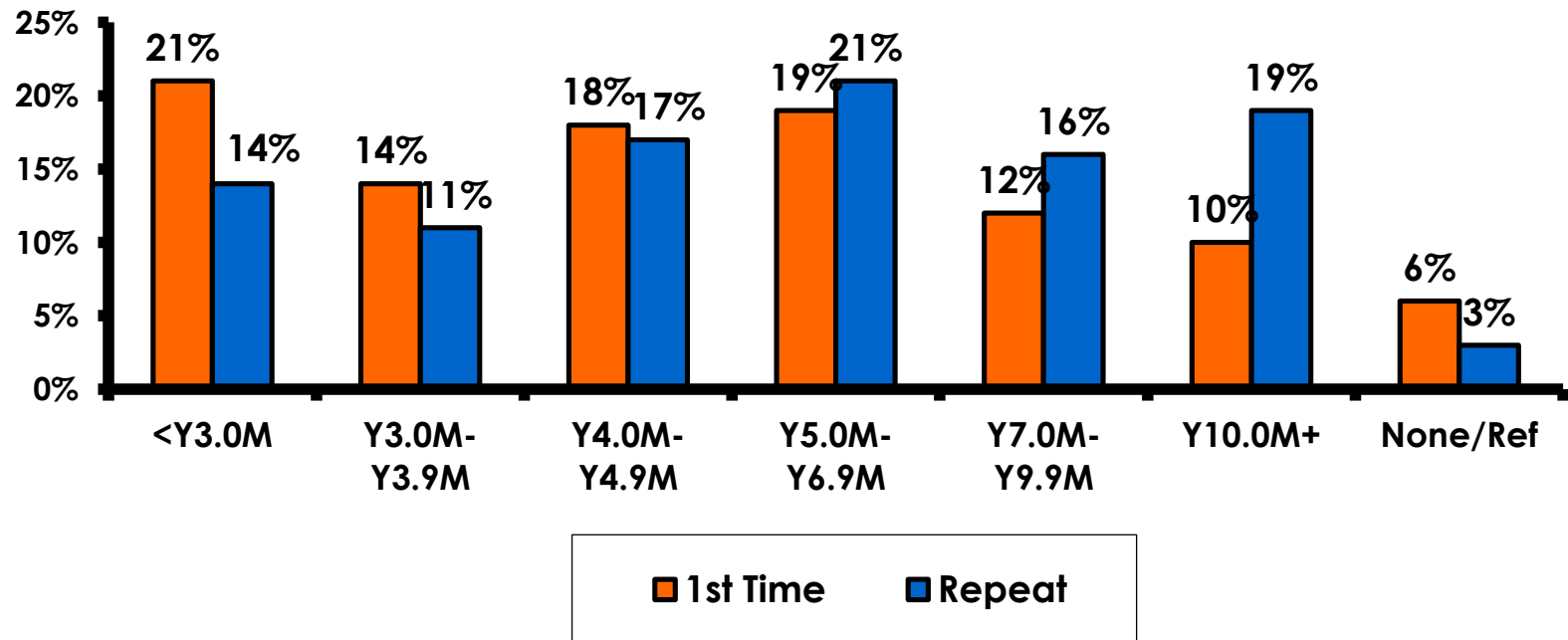
# Personal Income



# Personal Income

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
<¥3.0m	21%	14%	15%	16%	16%	18%	19%	19%	17%
¥3.0m- ¥3.9m	16%	14%	14%	14%	15%	14%	13%	14%	13%
¥4.0m- ¥4.9m	12%	12%	14%	14%	14%	15%	14%	15%	17%
¥5.0m- ¥6.9m	17%	19%	19%	18%	19%	20%	20%	20%	20%
¥7.0m- ¥9.9m	13%	16%	18%	16%	14%	17%	15%	15%	14%
¥10.0m+	17%	21%	18%	18%	18%	14%	16%	15%	14%
Refused/ None	4%	2%	2%	3%	3%	2%	2%	3%	4%

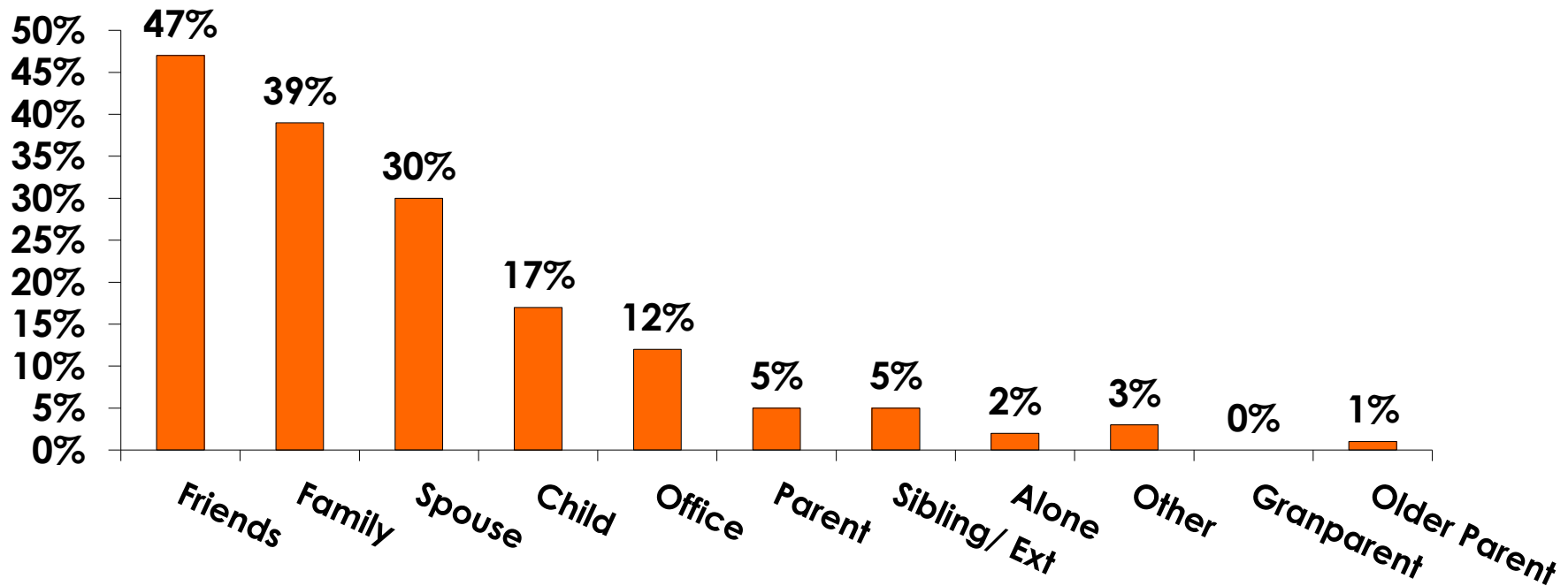
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	247	90	157	145	66	23	13
		Column N %	6%	4%	8%	13%	5%	2%	3%
	Y2.0M-Y3.0M	Count	427	133	294	172	185	42	28
		Column N %	11%	7%	16%	16%	14%	4%	7%
	Y3.0M-Y4.0M	Count	492	217	275	125	250	84	31
		Column N %	13%	11%	15%	12%	19%	8%	7%
	Y4.0M-Y5.0M	Count	671	352	319	138	292	179	59
		Column N %	17%	18%	17%	13%	22%	17%	14%
	Y5.0M-Y7.0M	Count	759	447	312	134	255	267	97
		Column N %	20%	22%	17%	12%	20%	26%	23%
	Y7.0M-Y10.0M	Count	539	366	172	98	133	215	90
		Column N %	14%	18%	9%	9%	10%	21%	22%
	Y10.0M+	Count	554	324	230	130	110	216	95
		Column N %	14%	16%	12%	12%	8%	21%	23%
	No Income	Count	172	79	93	144	16	5	4
		Column N %	4%	4%	5%	13%	1%	0%	1%
	Total	Count	3861	2008	1852	1086	1307	1031	417

# Travel Companions



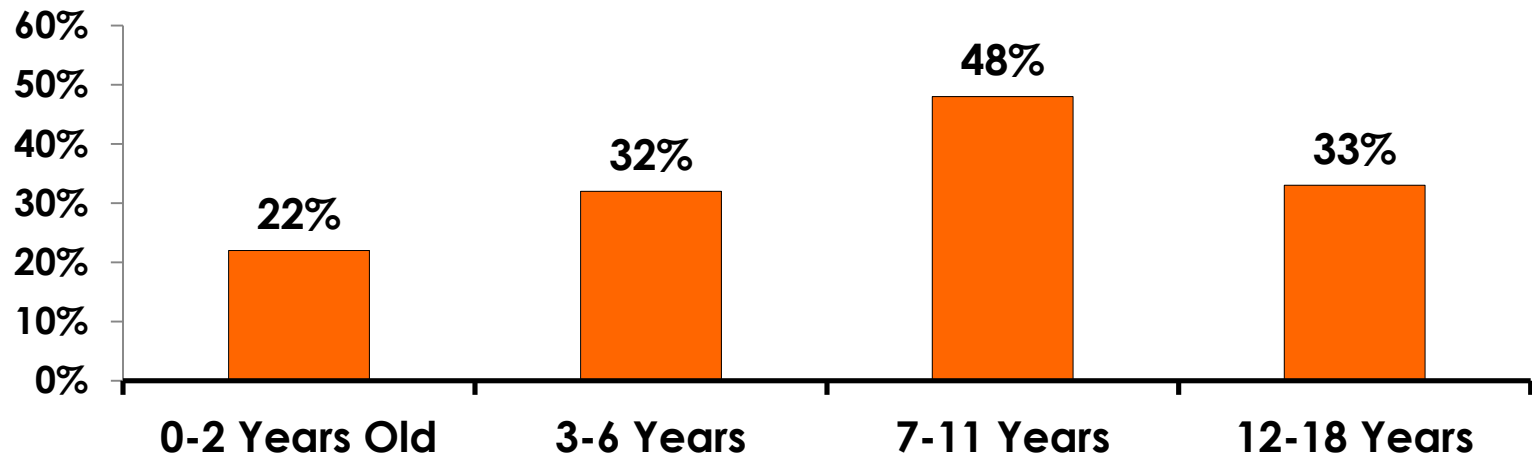
# Travel Companions

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
Friends	53%	35%	39%	40%	46%	49%	53%	53%	47%
Family	14%	28%	23%	27%	25%	26%	23%	39%	39%
Spouse	18%	25%	28%	25%	20%	18%	16%	31%	30%
Child	7%	18%	11%	14%	15%	15%	13%	15%	17%
Parent	NA	NA	NA	NA	NA	NA	NA	6%	5%
Office	13%	8%	7%	5%	5%	5%	5%	8%	12%
Sibling/ Ext Fam	NA	NA	NA	NA	NA	NA	NA	5%	5%
Alone	0%	1%	2%	2%	3%	2%	2%	1%	2%
Other	3%	3%	2%	2%	1%	0%	1%	1%	3%

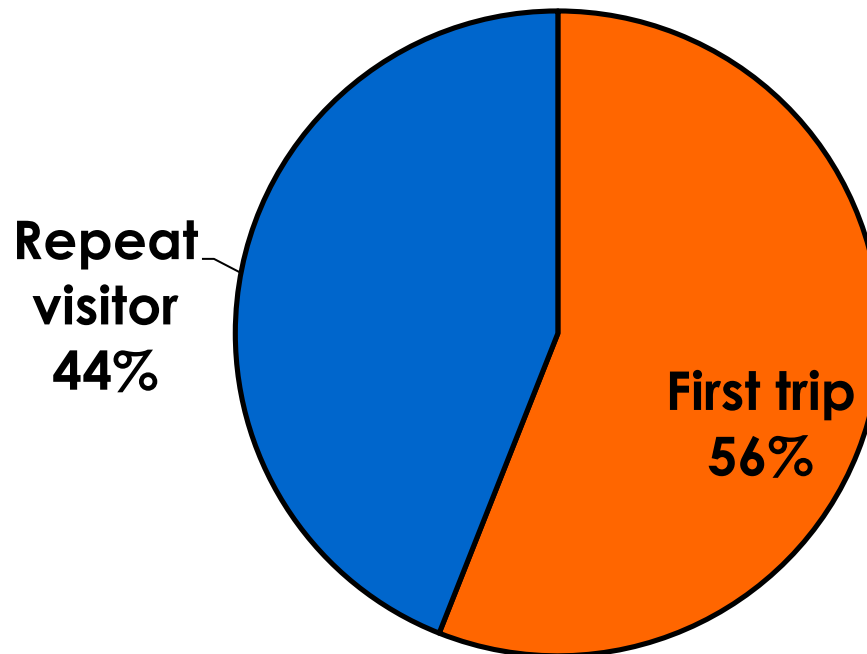
# Number of Children Travel Party

N=696 total respondents traveling with children.

(Of those N=696 respondents, there is a total of 1,124 children 18 years or younger)

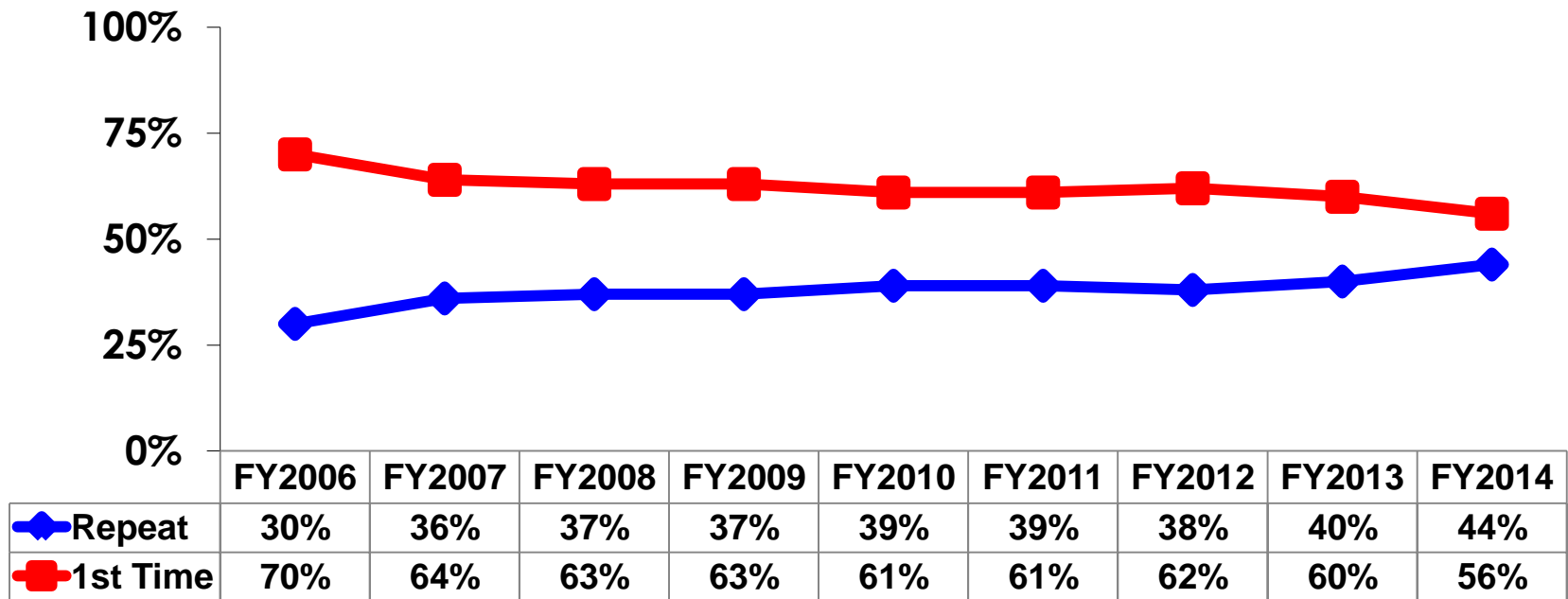


# Prior Trips to Guam





# PRIOR TRIPS TO GUAM



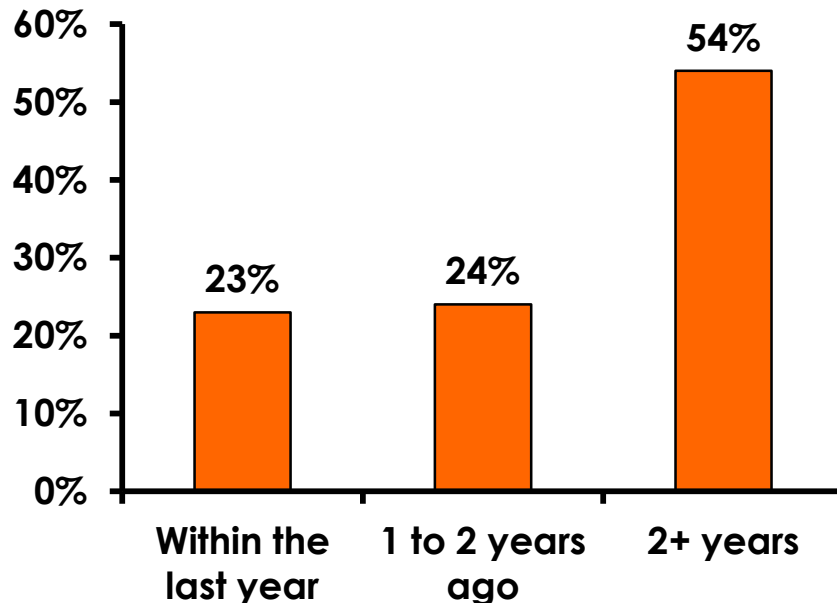
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	2124	1126	995	
		Column N %	50%	48%	54%	
	Female	Count	2083	1216	863	
		Column N %	50%	52%	46%	
	Total	Count	4207	2342	1858	
AGE	18-24	Count	1293	974	318	
		Column N %	31%	42%	17%	
	25-34	Count	1371	798	570	
		Column N %	33%	34%	31%	
	35-49	Count	1078	396	679	
		Column N %	26%	17%	37%	
	50+	Count	431	151	280	
		Column N %	10%	7%	15%	
		Total	Count	4173	2319	1847

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

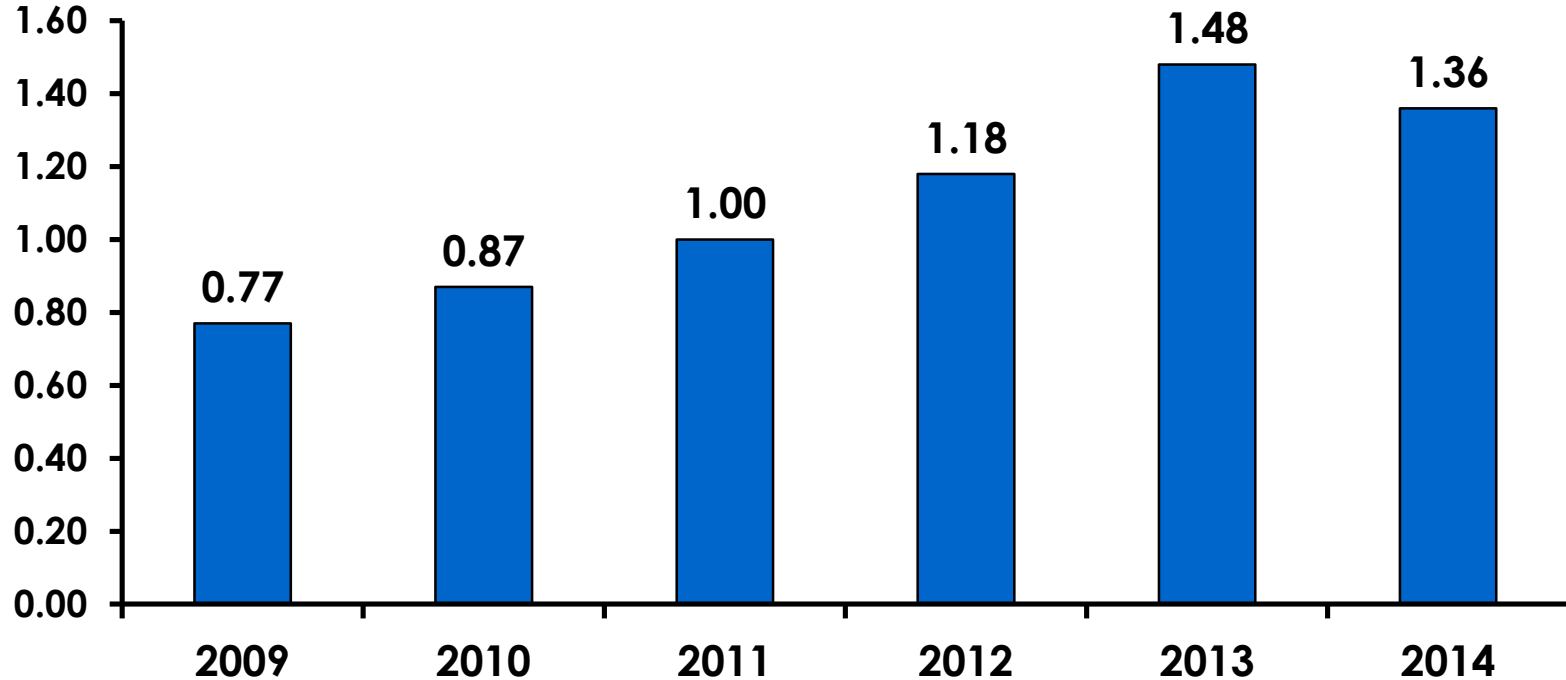
# Repeat Visitors Last Trip

n = 1810



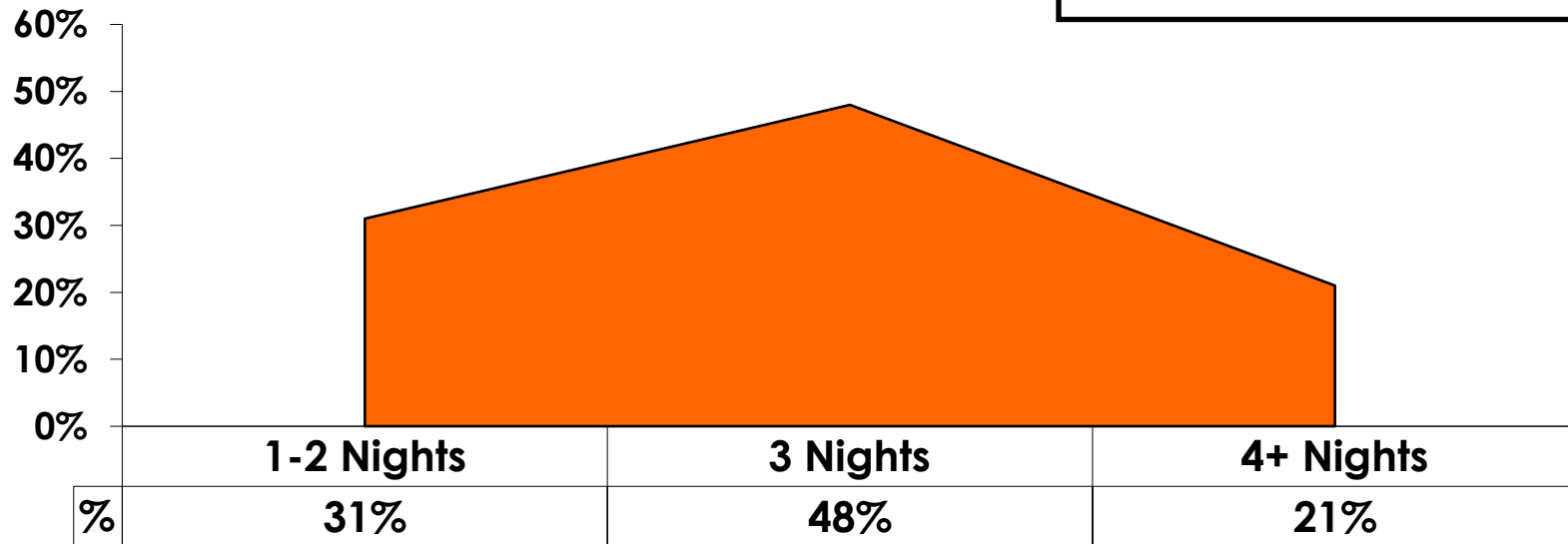
- The average repeat visitor has been to Guam 3.12 times.
- Less than half the repeat visitors have been to Guam within the last 2 years.

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

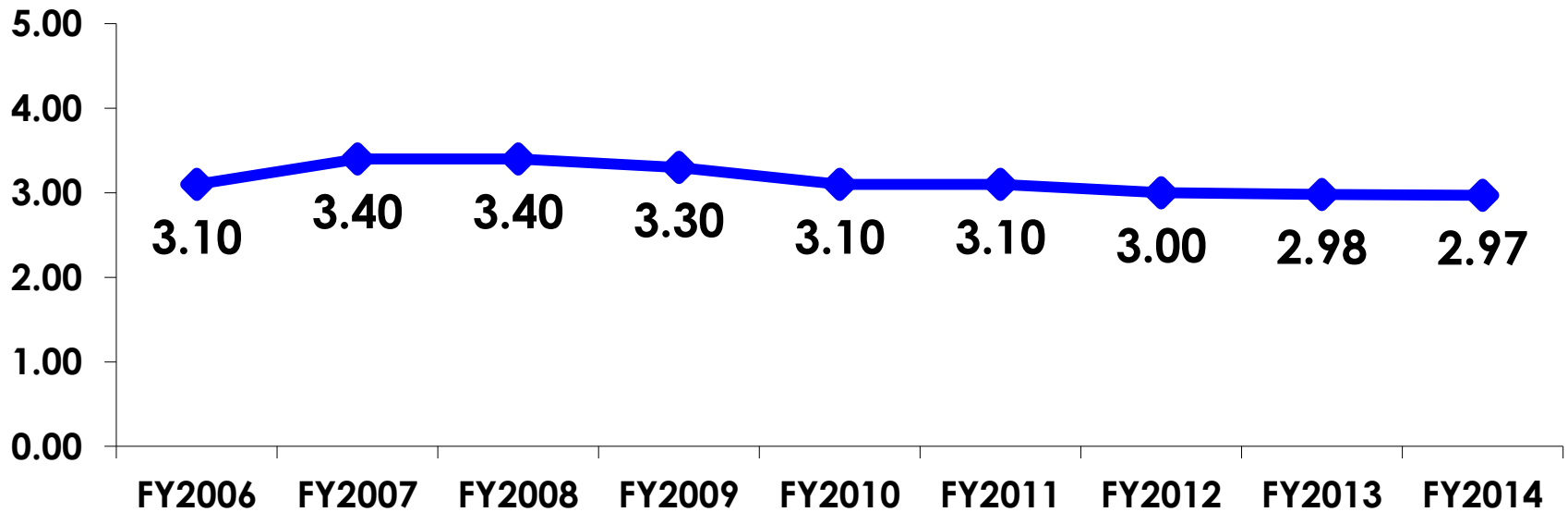


# Length of Stay

Mean = 2.97 Days  
Median = 3.0 Days



# AVG LENGTH OF STAY



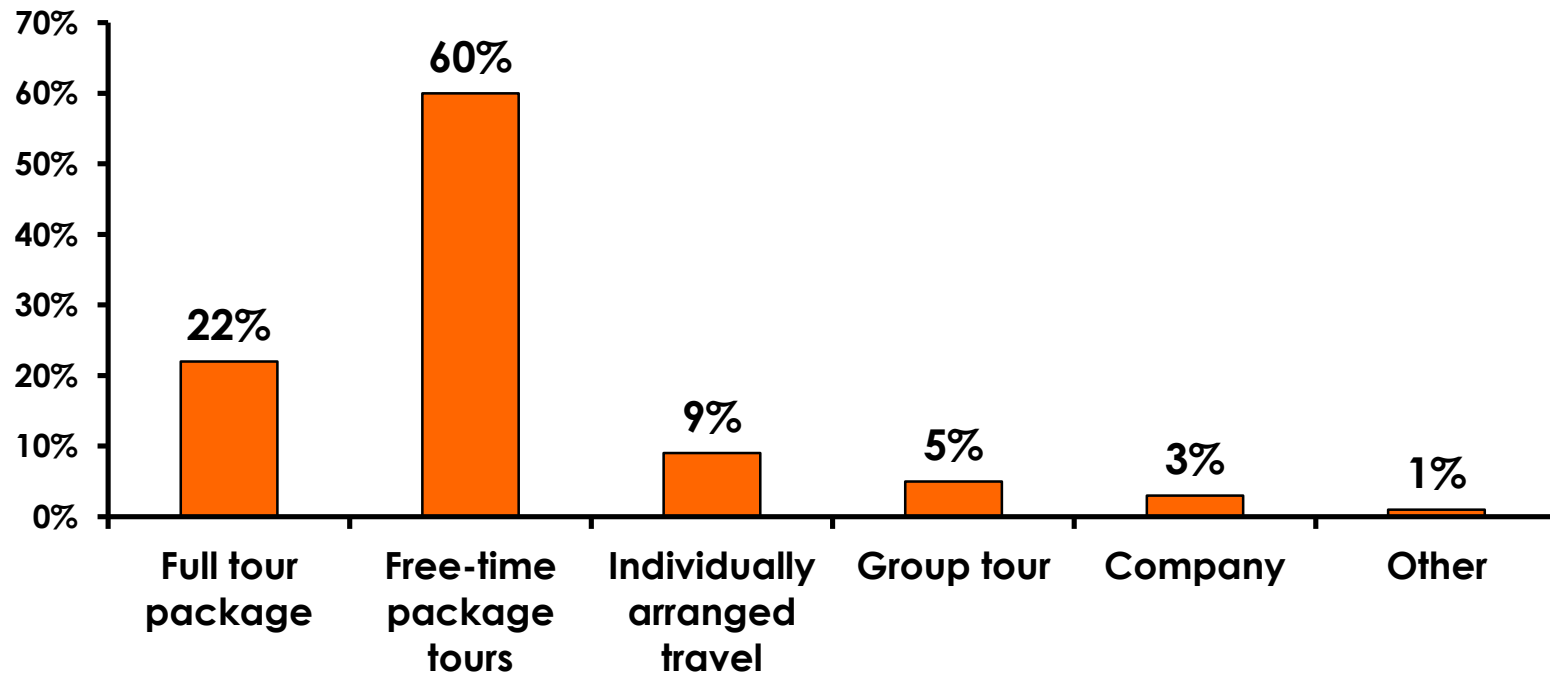
# Occupation by Income

		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	Student	18%	37%	9%	8%	9%	11%	12%	16%	81%	
	Office worker non-mgr	17%	13%	27%	28%	14%	16%	15%	13%		
	Engineer	15%	7%	15%	17%	18%	19%	17%	10%		
	Salesperson	12%	2%	11%	13%	22%	14%	14%	9%	1%	
	Self-employed	7%	6%	4%	4%	7%	8%	7%	10%	3%	
	Manager	6%		1%	2%	4%	6%	12%	14%	1%	
	Homemaker	5%	4%	3%	3%	6%	7%	6%	7%	5%	
	Professional/ Specialist	3%	2%	3%	5%	4%	2%	2%	6%		
	Skilled worker	3%	3%	4%	5%	3%	4%	2%	2%		
	Other	3%	5%	5%	3%	4%	2%	2%	2%	1%	
	Freeter	2%	11%	3%	2%	2%	2%	1%	1%		
	Govt- office worker non-mgr	2%	1%	5%	3%	3%	2%	1%	1%		
	Teacher	2%	3%	6%	1%	2%	1%	1%	2%		
	Executive (30+ employees)	2%	0%	1%	1%	1%	1%	3%	6%		
	Unemployed	1%	3%	2%	2%	0%	1%	1%	0%	8%	
	Govt- Manager	1%				1%	2%	2%	1%		
	Retired	1%	0%	1%	1%	0%	1%	1%			
	Free-lancer	0%	0%	0%	0%	0%	0%	0%	0%	1%	
	Govt- Executive	0%	0%		0%	0%	0%		0%		
	Total	Count	4133	244	426	492	668	759	538	554	172

# SECTION 2 **TRAVEL PLANNING**



# Travel Planning - Overall



# Travel Planning

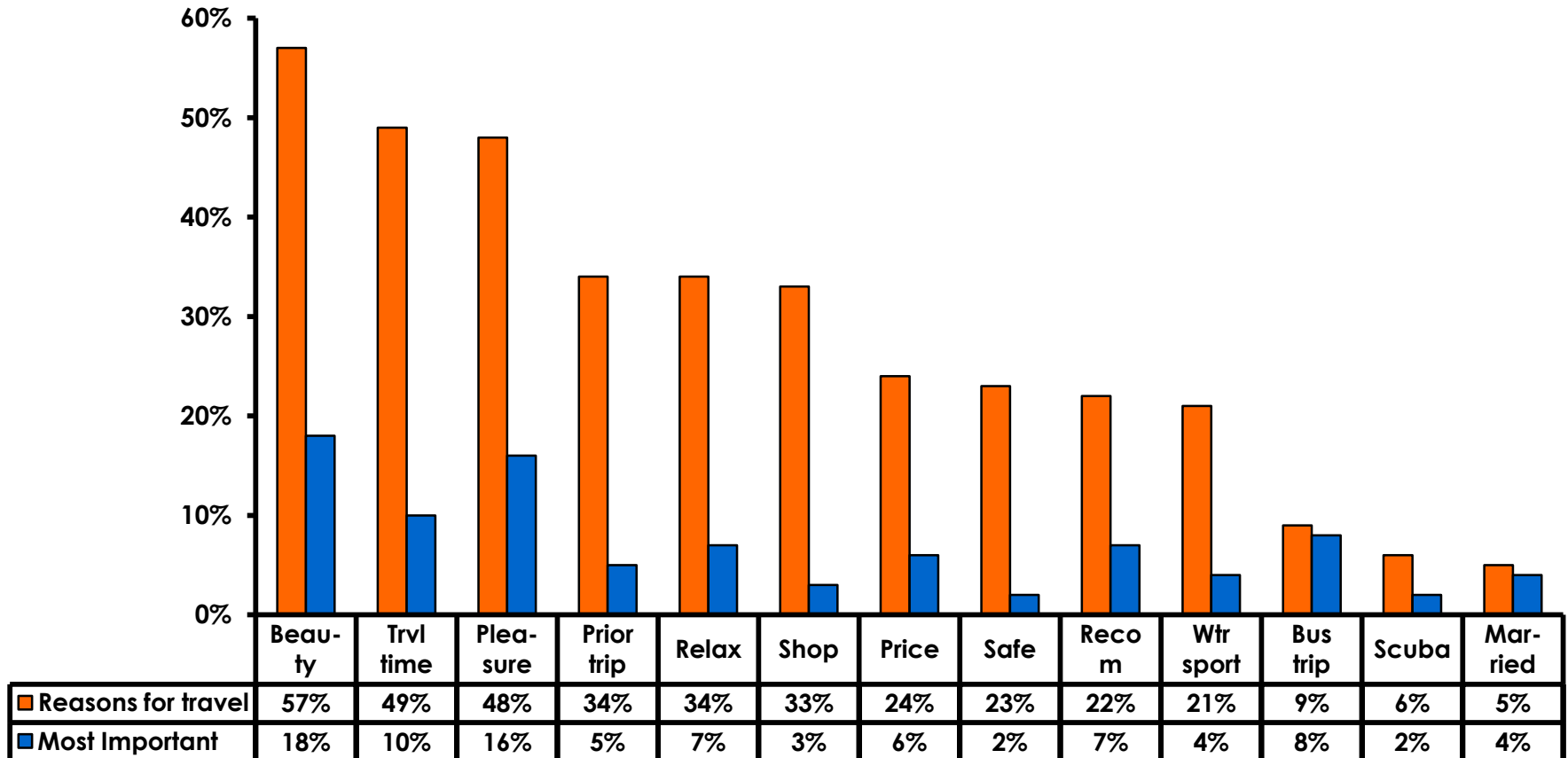
	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
<b>Full-pkg tour</b>	19%	23%	25%	25%	20%	23%	22%	25%	22%
<b>Free-time pkg tour</b>	69%	64%	64%	65%	66%	68%	69%	62%	60%
<b>FIT</b>	3%	7%	7%	6%	10%	6%	5%	7%	9%
<b>Group tour</b>	8%	6%	4%	3%	3%	3%	3%	3%	5%
<b>Com-pany</b>	NA	NA	NA	NA	NA	1%	1%	2%	3%
<b>Other</b>	0%	0%	0%	1%	1%	0%	0%	1%	1%

# Accommodation by Income

Average length of stay: 2.97 days

		TOTAL	Q26								
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q9	Guam Plaza Hotel	18%	19%	26%	19%	19%	18%	17%	13%	19%	
	Guam Reef & Olive Spa	10%	8%	14%	9%	11%	8%	10%	9%	6%	
	Outrigger Guam Resort	8%	5%	7%	9%	8%	10%	9%	10%	1%	
	Grand Plaza Hotel	6%	10%	8%	6%	7%	5%	3%	6%	12%	
	Onward Beach Resort	6%	5%	3%	7%	4%	8%	9%	6%	3%	
	Hotel Nikko Guam	5%	2%	3%	4%	7%	5%	8%	7%	3%	
	Fiesta Resort Guam	5%	3%	5%	7%	4%	5%	6%	4%	3%	
	PIC Club	5%	6%	3%	4%	5%	5%	5%	7%	8%	
	Pacific Bay Hotel	5%	8%	5%	4%	4%	5%	3%	5%	6%	
	Holiday Resort Guam	4%	3%	3%	4%	5%	5%	4%	3%	6%	
	Westin Resort Guam	4%	2%	4%	5%	4%	3%	4%	5%	2%	
	Hilton Guam Resort	4%	5%	2%	3%	4%	3%	4%	4%	1%	
	Royal Orchid Guam	3%	2%	4%	3%	4%	3%	2%	2%	3%	
	Hyatt Regency Guam	3%	2%	1%	2%	3%	3%	2%	4%	1%	
	Leo Palace Resort	2%	2%	3%	2%	1%	3%	3%	3%	3%	
	Oceanview Hotel	2%	4%	2%	1%	2%	2%	3%	1%	6%	
	Sheraton Laguna Guam	2%	2%	2%	2%	2%	2%	3%	2%		
	Bayview Hotel	2%	3%	2%	2%	1%	2%	1%	1%	6%	
	Other	1%	2%	1%	1%	2%	1%	1%	1%	3%	
	Hotel Santa Fe	1%	4%	1%	1%	0%	1%	1%	1%	1%	
	Guam Marriott Resort	1%			1%	1%	2%	1%	2%	1%	
	Ramada Suites Guam	1%		0%	1%	1%	1%	1%	1%	2%	
	Verona Resort & Spa	1%	1%	0%	1%	0%	1%	0%	1%	1%	
	Condo	1%	1%	0%	1%		0%	0%	1%	1%	
	Tumon Bay Capital Hotel	0%	0%	1%	0%	0%	1%		0%	1%	
	Home stay/ friend/ relative	0%	0%		0%	0%	0%		0%		
	Apartment	0%			0%						
	Guam Aurora Resort	0%		0%				0%			
	Days Inn (Tamuning)	0%				0%					
	Total	Count	4199	246	426	491	669	758	538	554	172

# Travel Motivation - Top Responses



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# Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure and
- Short travel time

are the primary reasons for visiting during this period.

# Most Important- Top 3

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
<b>Natural Beauty</b>	16%	15%	16%	16%	17%	18%	17%	18%	18%
<b>Pleasure</b>	16%	14%	12%	12%	14%	18%	18%	16%	16%
<b>Relax</b>	10%	Not top 3	Not top 3	Not Top 3	11%	9%	Not top 3	Not top 3	Not top 3
<b>Short Travel Time</b>	Not Top 3	13%	10%	Not Top 3	Not Top 3	9%	Not top 3	10%	10%
<b>Price</b>	Not Top 3	Not Top 3	10%	14%	11%	Not top 3	10%	Not top 3	Not top 3

# Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty	57%	62%	57%	56%	47%	52%	63%	
	Short travel time	49%	41%	50%	58%	50%	49%	49%	
	Pleasure	48%	54%	48%	45%	39%	42%	55%	
	Previous trip	34%	18%	31%	51%	48%	36%	32%	
	Relax	34%	30%	35%	37%	34%	31%	37%	
	Shopping	33%	36%	36%	28%	27%	24%	42%	
	Price	24%	26%	22%	24%	21%	22%	26%	
	Safe	23%	18%	21%	26%	30%	24%	22%	
	Recomm- friend/family/trvl agnt	22%	34%	20%	11%	16%	18%	25%	
	Water sports	21%	25%	22%	18%	16%	19%	23%	
	Company/ Business Trip	9%	8%	10%	11%	8%	9%	9%	
	Scuba	6%	6%	7%	4%	4%	6%	6%	
	Married/ Attn wedding	5%	2%	8%	4%	6%	6%	3%	
	Other	4%	6%	2%	4%	4%	4%	4%	
	Honeymoon	4%	2%	7%	3%	1%	6%	1%	
	Golf	3%	0%	1%	4%	16%	6%	1%	
	Visit friends/ Relatives	2%	3%	1%	2%	3%	2%	2%	
	Organized sports	1%	2%	1%	1%	2%	2%	1%	
	Company Sponsored	1%	1%	1%	1%	2%	1%	1%	
	Career Cert/ Testing	0%	0%	0%		0%	0%	0%	
	Convention/ Trade/ Conference	0%		0%				0%	
	Total	Count	4198	1287	1369	1076	431	2120	2077

# 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%	53%	58%	57%	53%	56%	59%	60%	62%	
	Short travel time	49%	38%	46%	48%	45%	54%	56%	59%	37%	
	Pleasure	48%	45%	52%	46%	45%	49%	49%	49%	52%	
	Previous trip	34%	23%	27%	32%	33%	37%	41%	50%	22%	
	Relax	34%	33%	36%	28%	34%	34%	36%	38%	27%	
	Shopping	33%	32%	39%	32%	32%	30%	33%	34%	36%	
	Price	24%	21%	22%	22%	24%	25%	29%	20%	30%	
	Safe	23%	19%	21%	18%	24%	24%	29%	24%	25%	
	Recomm- friend/family/trvl agnt	22%	30%	24%	23%	22%	18%	17%	17%	33%	
	Water sports	21%	18%	26%	24%	19%	20%	20%	21%	26%	
	Company/ Business Trip	9%	8%	15%	10%	11%	11%	6%	7%	5%	
	Scuba	6%	6%	6%	5%	7%	5%	6%	6%	9%	
	Married/ Attn wedding	5%	4%	4%	6%	7%	6%	4%	3%	1%	
	Other	4%	5%	4%	3%	2%	5%	4%	3%	8%	
	Honeymoon	4%	2%	3%	6%	5%	6%	3%	1%	2%	
	Golf	3%	2%	1%	2%	2%	4%	6%	7%	1%	
	Visit friends/ Relatives	2%	4%	2%	3%	1%	1%	2%	1%	5%	
	Organized sports	1%	1%	1%	1%	1%	1%	2%	1%	2%	
	Company Sponsored	1%	0%	1%	1%	2%	1%	1%	1%		
	Career Cert/ Testing	0%			0%	0%	0%		0%	1%	
	Convention/ Trade/ Conference	0%					0%				
	Total	Count	4198	246	427	490	668	758	537	554	171



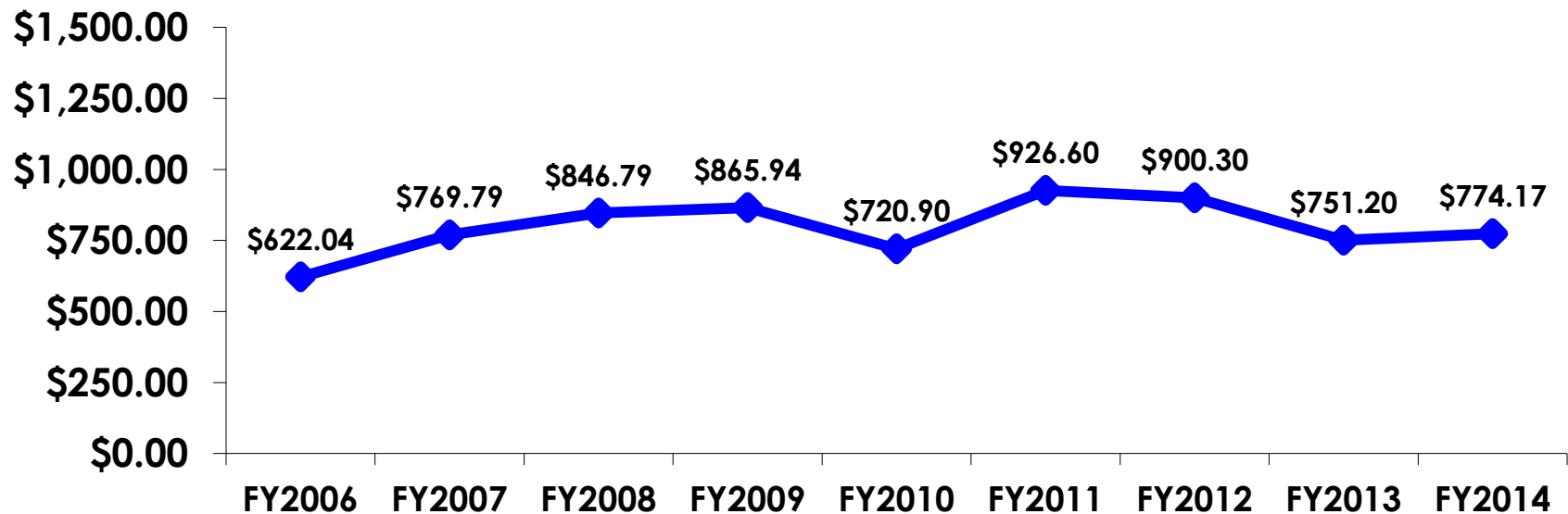
# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures

¥Varies/US\$1

- \$1,546.41 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$39,162 = maximum (highest amount recorded for the entire sample)
- \$774.17 = overall mean average per person prepaid expenditures

# PREPAID EXPENDITURES Per Person



# Breakdown of Prepaid Expenditures

¥Varies=\$1

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

	MEAN \$
Air & Accommodation package only	\$1,442.20
Air & Accommodation w/ daily meal package	\$2,779.61
Air only	\$1,330.39
Accommodation only	\$684.83
Accommodation w/ daily meal only	\$1,207.25
Food & Beverages in Hotel	\$141.44
Ground transportation – Japan	\$88.70
Ground transportation – Guam	\$116.66
Optional tours/ activities	\$303.01
Other expenses	\$537.87
<b>Total Prepaid</b>	<b>\$1,546.41</b>

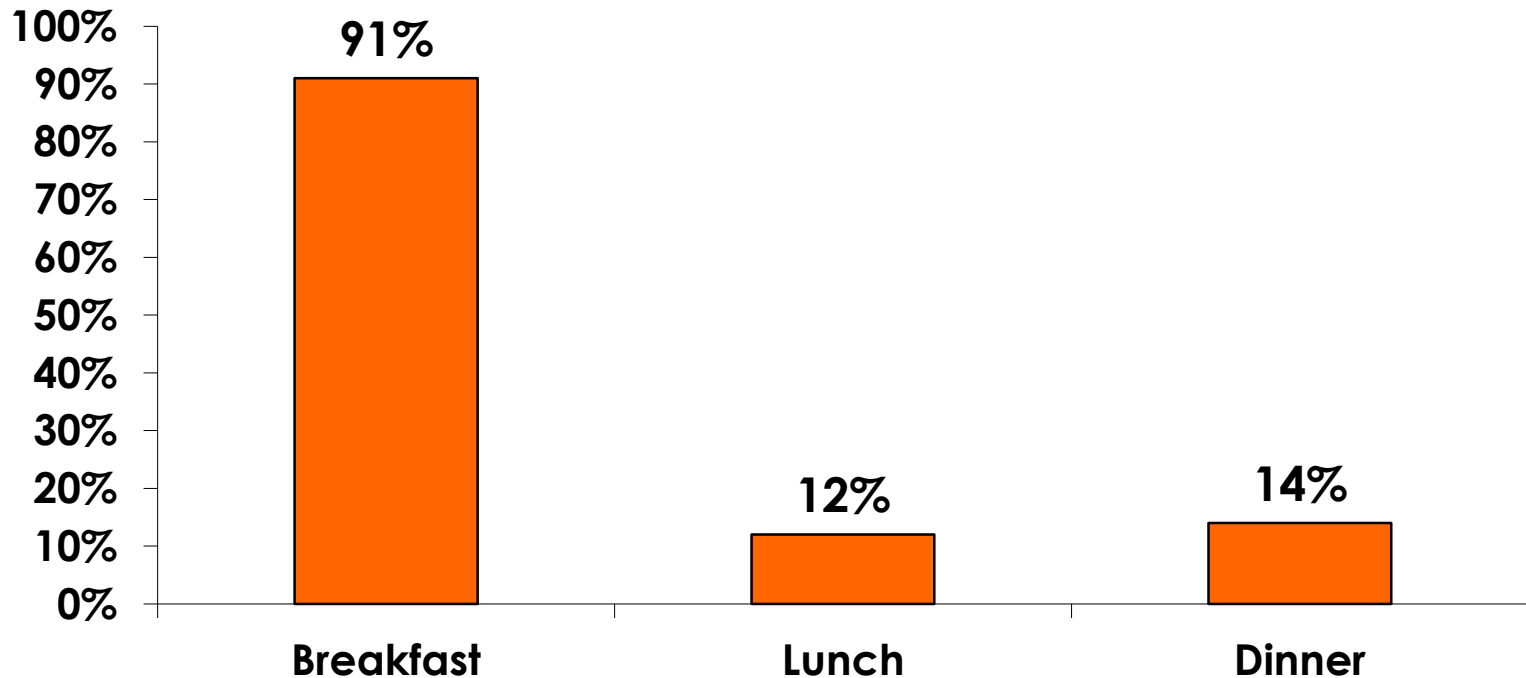
# Breakdown of Prepaid Expenditures

	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
Air & Accommodation package only	\$1,550	\$1,589	\$1,696	\$1,402.50	\$1,767.00	\$1,681.20	\$1,369.90	\$1,442.20
Air & Accommodation w/ daily meal package	\$2,536	\$3,404	\$3,006	\$3,199.80	\$3,555.90	\$3,546.00	\$2,276.72	\$2,779.61
Air only	\$1,129	\$924	\$937	\$952.90	\$1,359.60	\$1,836.40	\$1,454.43	\$1,330.39
Accommodation only	\$532	\$520	\$748	\$524.30	\$748.30	\$1,136.90	\$843.15	\$684.83
Accommodation w/ daily meal only	\$934	\$887	\$595	\$944.70	\$1,040.70	\$838.10	\$1,596.78	\$1,207.25
Food & Beverages in Hotel	\$103	\$394	\$232	\$168.50	\$209.90	\$194.20	\$116.71	\$141.44
Ground transportation – Japan	\$110	\$121	\$100	\$95.30	\$129.70	\$156.70	\$68.87	\$88.70
Ground transportation – Guam	\$62	\$88	\$93	\$93.90	\$58.60	\$100.80	\$75.43	\$116.66
Optional tours/ activities	\$274	\$255	\$316	\$289.50	\$298.60	\$302.40	\$273.09	\$303.01
Other expenses	\$417	\$726	\$834	\$530.00	\$512.40	\$420.20	\$609.30	\$537.87
<b>Total Prepaid</b>	<b>\$1,728</b>	<b>\$1,816</b>	<b>\$1,925</b>	<b>\$1,513.90</b>	<b>\$1,993.70</b>	<b>\$1,820.20</b>	<b>\$1,492.88</b>	<b>\$1,546.41</b>

# PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=518

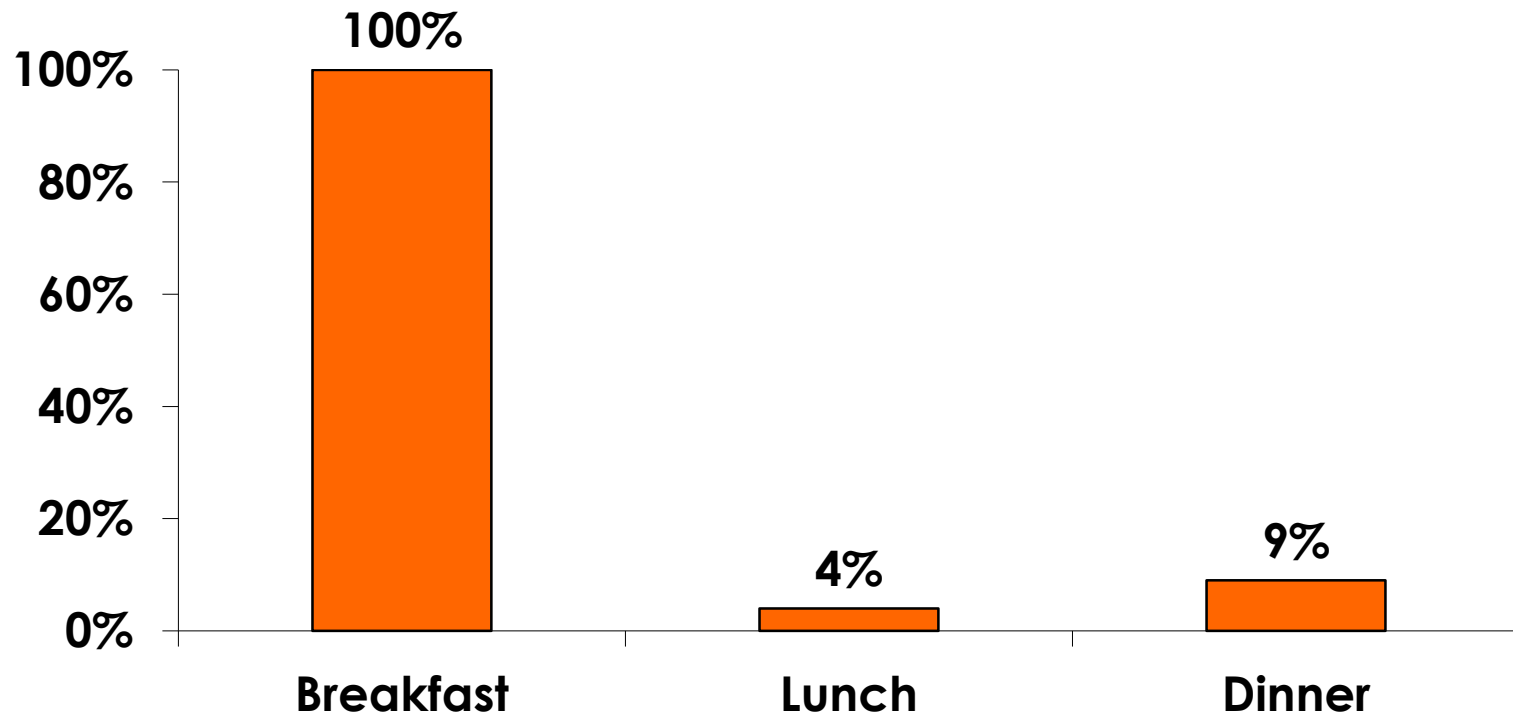


Mean=\$2,779.61 per travel party

# PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

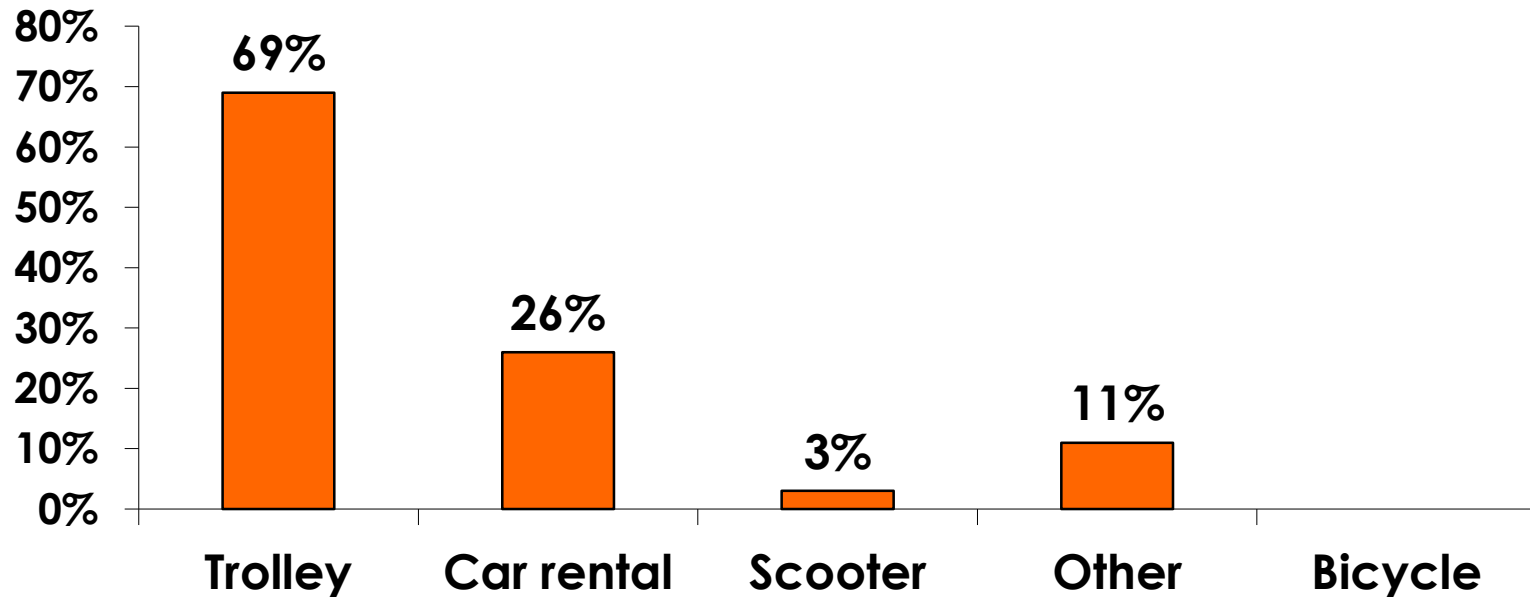
n=23



Mean=\$1,207.25 per travel party

# PREPAID GROUND TRANSPORTATION

n=159



Mean=\$116.66 per travel party

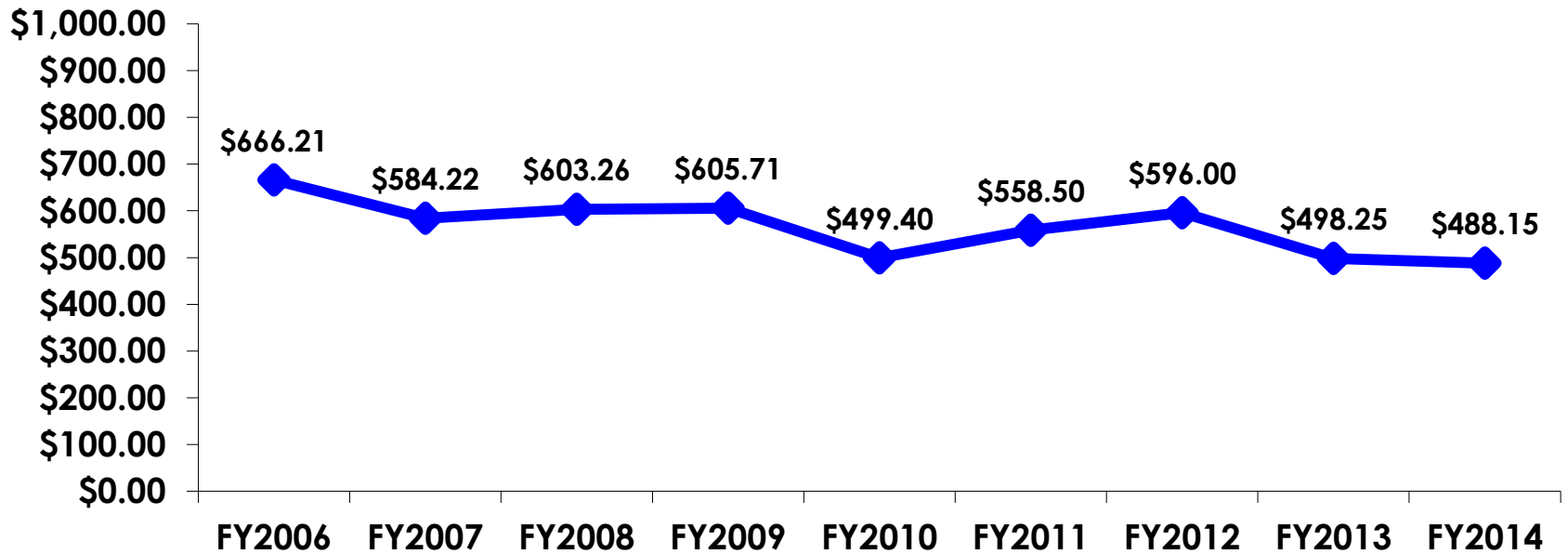


# On-Island Expenditures

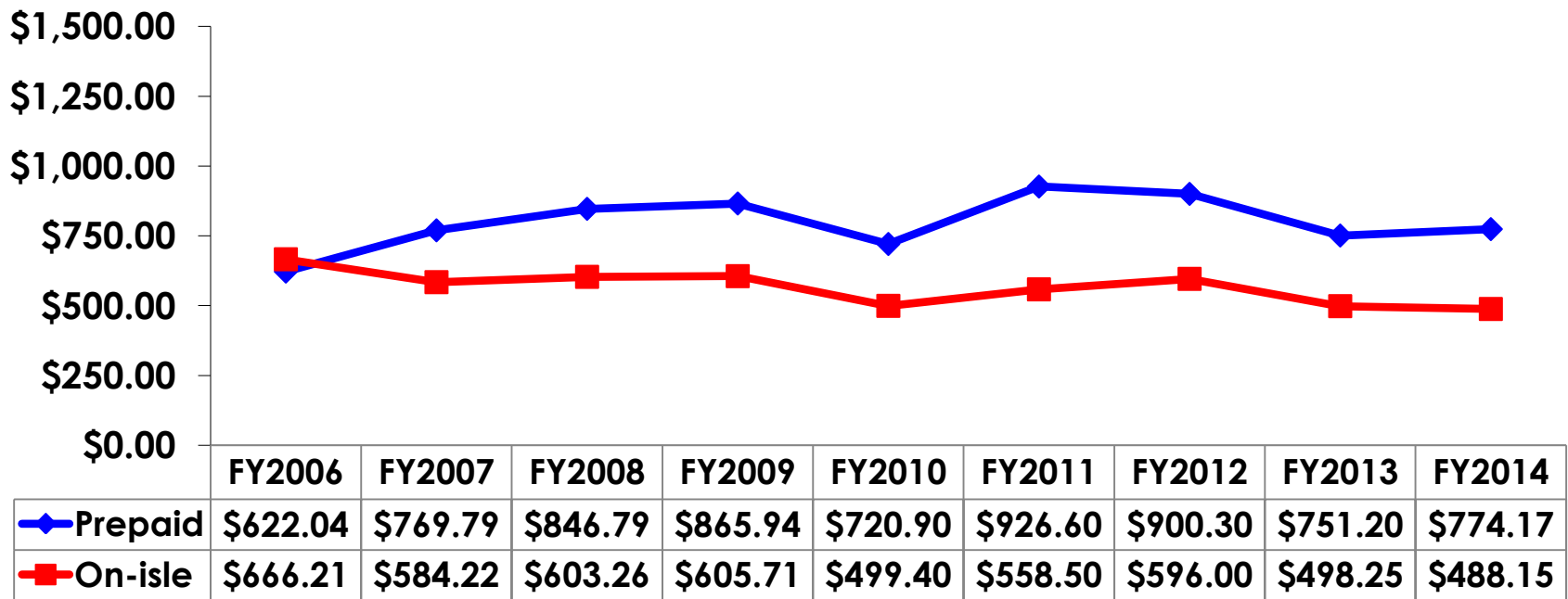
- \$777.05 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$40,000 = Maximum (highest amount recorded for the entire sample)
- \$488.15 = overall mean average per person on-island expenditure

# ON-ISLAND EXPENDITURES

## Per Person



# PREPAID/ ON-ISLE EXPENDITURES – Per Person



# 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	\$488.15	\$456.90	\$519.77	\$396.82	\$491.45	\$451.27	\$487.74	\$454.40	\$584.00	\$533.57	\$562.82
	Median	\$380	\$350	\$400	\$350	\$400	\$300	\$368	\$350	\$450	\$400	\$500
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$10,000	\$10,000	\$6,000	\$2,000	\$5,000	\$10,000	\$2,500	\$5,500	\$6,000	\$5,000	\$4,000

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$39.76	\$53.41	\$25.86	\$17.09	\$29.47	\$66.95	\$73.90
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$35.01	\$42.05	\$27.84	\$25.11	\$34.95	\$48.50	\$31.39
	Median	\$7	\$10	\$0	\$0	\$5	\$17	\$0
F&B RESTRNT	Mean	\$92.32	\$126.76	\$57.25	\$44.94	\$80.54	\$156.06	\$115.96
	Median	\$20	\$50	\$2	\$0	\$30	\$70	\$50
OPT TOUR	Mean	\$79.19	\$102.61	\$55.35	\$52.04	\$74.84	\$105.38	\$111.09
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$203.01	\$200.83	\$205.32	\$119.91	\$214.32	\$280.37	\$222.26
	Median	\$40	\$20	\$50	\$10	\$50	\$60	\$20
GIFT- OTHER	Mean	\$121.41	\$132.53	\$110.13	\$79.87	\$122.63	\$148.16	\$179.61
	Median	\$50	\$50	\$50	\$40	\$60	\$100	\$100
TRANS	Mean	\$18.60	\$25.56	\$11.52	\$10.21	\$16.82	\$30.84	\$19.72
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$190.45	\$196.93	\$182.01	\$156.55	\$165.15	\$247.70	\$229.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$777.05	\$883.89	\$666.56	\$494.01	\$737.56	\$1,083.74	\$996.42
	Median	\$500	\$600	\$500	\$400	\$500	\$775	\$600

# On-Island Expenditures

## First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$39.76	\$28.09	\$54.44
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$35.01	\$29.53	\$41.95
	Median	\$7	\$6	\$10
F&B RESTRNT	Mean	\$92.32	\$71.23	\$118.97
	Median	\$20	\$20	\$35
OPT TOUR	Mean	\$79.19	\$75.99	\$83.26
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$203.01	\$156.96	\$260.98
	Median	\$40	\$30	\$50
GIFT- OTHER	Mean	\$121.41	\$106.83	\$139.86
	Median	\$50	\$50	\$55
TRANS	Mean	\$18.60	\$13.22	\$25.45
	Median	\$0	\$0	\$0
OTHER	Mean	\$190.45	\$177.11	\$207.80
	Median	\$0	\$0	\$0
TOTAL	Mean	\$777.05	\$660.04	\$925.24
	Median	\$500	\$500	\$600

---

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

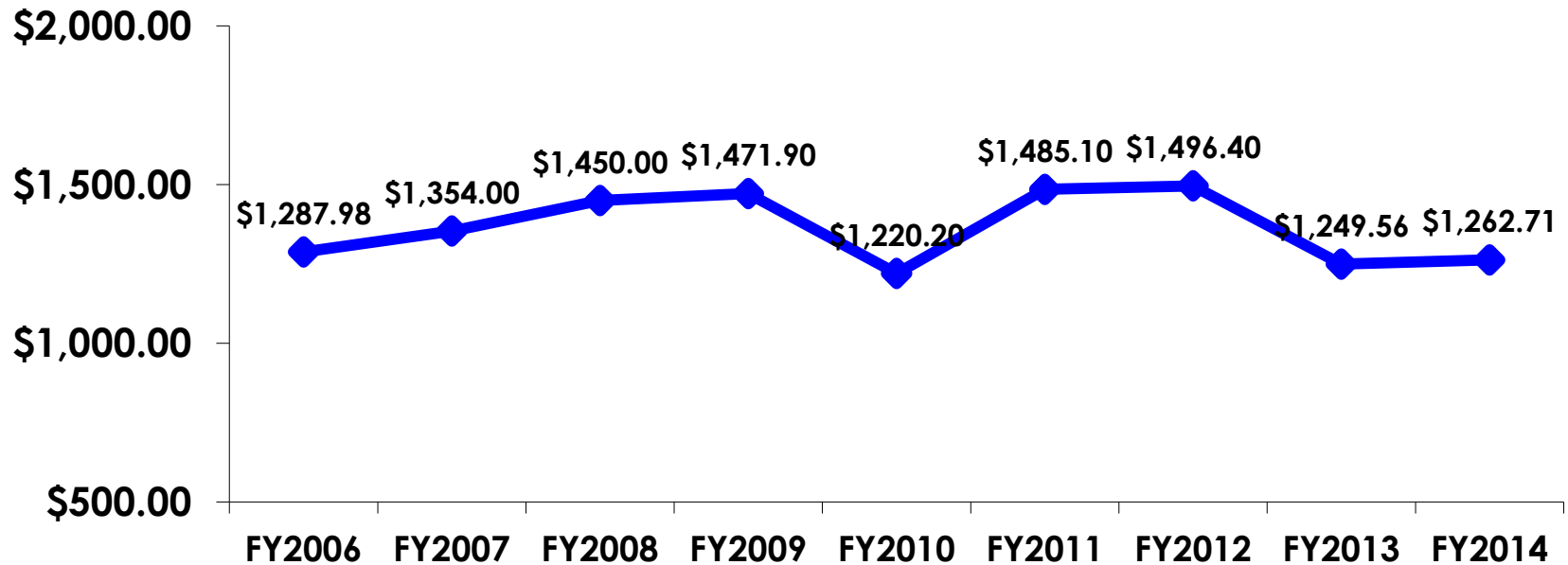
- \$1,262.71 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$15,008 = Maximum (highest amount recorded for the entire sample)

# ON-ISLE EXPENDITURES – Per Day





# TOTAL EXPENDITURES Per Person



# Breakdown of On-Island Expenditures

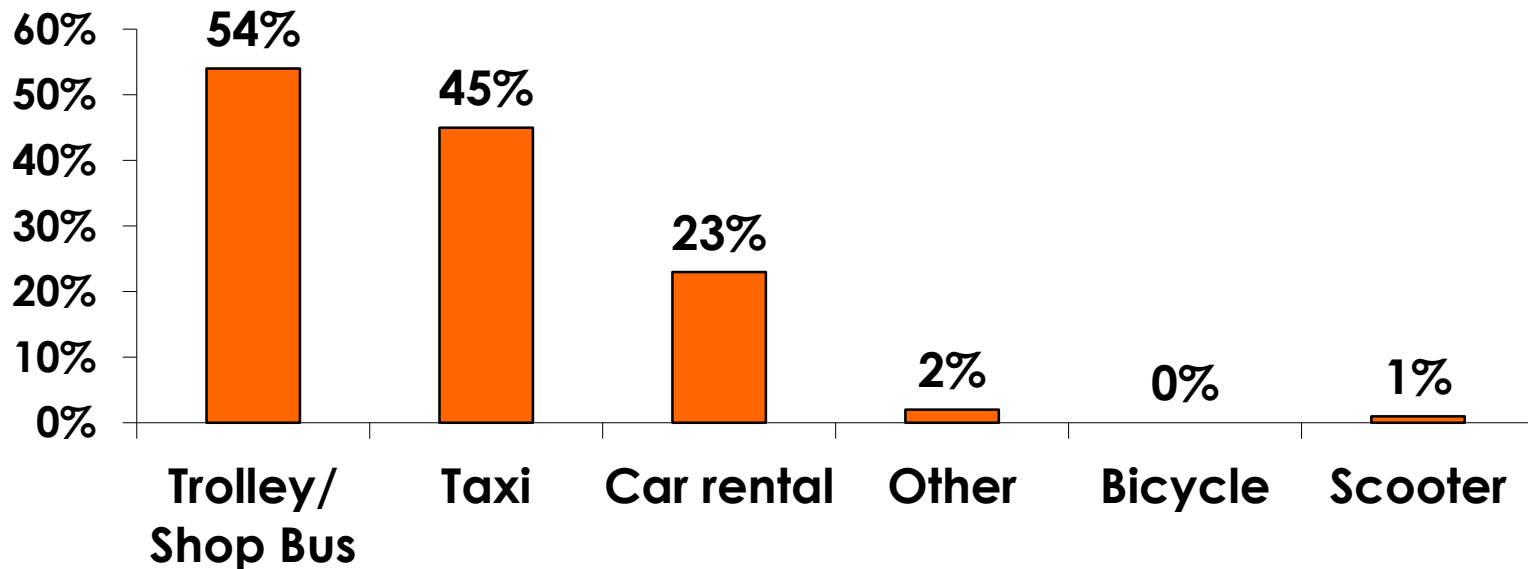
	MEAN \$
Food & beverage in a hotel	\$39.76
Food & beverage in fast food restaurant/convenience store	\$35.01
Food & beverage at restaurants or drinking establishments outside a hotel	\$92.32
Optional tours and activities	\$79.19
Gifts/ souvenirs for yourself/companions	\$203.01
Gifts/ souvenirs for friends/family at home	\$121.41
Local transportation	\$18.60
Other expenses not covered	\$190.45
<b>Average Total</b>	<b>\$770.05</b>

# Breakdown of On-Island Expenditures

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
Food & beverage in a hotel	\$37.30	\$56.40	\$54.50	\$46.10	\$41.80	\$34.50	\$33.10	\$35.62	\$39.76
Food & beverage in fast food restaurant/convenience store	\$35.60	\$41.70	\$36.20	\$44.90	\$34.10	\$33.10	\$34.00	\$32.98	\$35.01
Food & beverage at restaurants or drinking establishments outside a hotel	\$91.10	\$105.40	\$94.00	\$95.50	\$76.70	\$84.00	\$80.70	\$80.56	\$92.32
Optional tours and activities	\$122.40	\$127.10	\$119.30	\$119.40	\$96.10	\$95.30	\$97.10	\$83.82	\$79.19
Gifts/ souvenirs for yourself/ companions	\$380.80	\$338.40	\$287.10	\$354.00	\$245.40	\$253.30	\$258.00	\$204.79	\$203.01
Gifts/ souvenirs for friends/family	\$181.60	\$174.70	\$143.70	\$181.90	\$126.50	\$129.30	\$136.40	\$121.09	\$121.41
Local transportation	\$15.10	\$20.00	\$16.70	\$17.50	\$17.30	\$15.20	\$16.50	\$16.36	\$18.60
Other expenses not covered	\$110.30	\$284.80	\$304.10	\$269.50	\$233.70	\$289.30	\$247.70	\$208.18	\$190.45
<b>Average Total</b>	<b>\$976.60</b>	<b>\$1,145.20</b>	<b>\$1,058.30</b>	<b>\$1,120.80</b>	<b>\$866.50</b>	<b>\$933.40</b>	<b>\$899.50</b>	<b>\$781.50</b>	<b>\$777.05</b>

# Local Transportation

n=861



Mean=\$18.60 per travel party

---

# Guam Airport Expenditures

- \$28.96 = Mean
- \$7 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,000 = Maximum (highest amount recorded for the entire sample)

# Breakdown of Airport Expenditures

	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	\$8.00
<b>Gifts/Souvenirs Self</b>	\$10.60
<b>Gifts/Souvenirs Others</b>	\$10.33
<b>Total</b>	<b>\$28.96</b>

# Breakdown of Airport

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
<b>Food &amp; Beverage</b>	\$7.40	\$9.20	\$9.80	\$7.00	\$7.00	\$7.40	\$9.70	\$7.79	\$8.00
<b>Gifts/ Souvenirs Self</b>	\$9.50	\$18.40	\$13.00	\$15.00	\$15.20	\$14.90	\$12.40	\$9.31	\$10.60
<b>Gifts/ Souvenirs Others</b>	\$7.70	\$12.40	\$11.50	\$10.20	\$11.60	\$8.50	\$10.00	\$11.90	\$10.33
<b>Total</b>	\$24.40	\$39.80	\$34.20	\$32.10	\$33.20	\$30.80	\$32.10	\$28.95	\$28.96

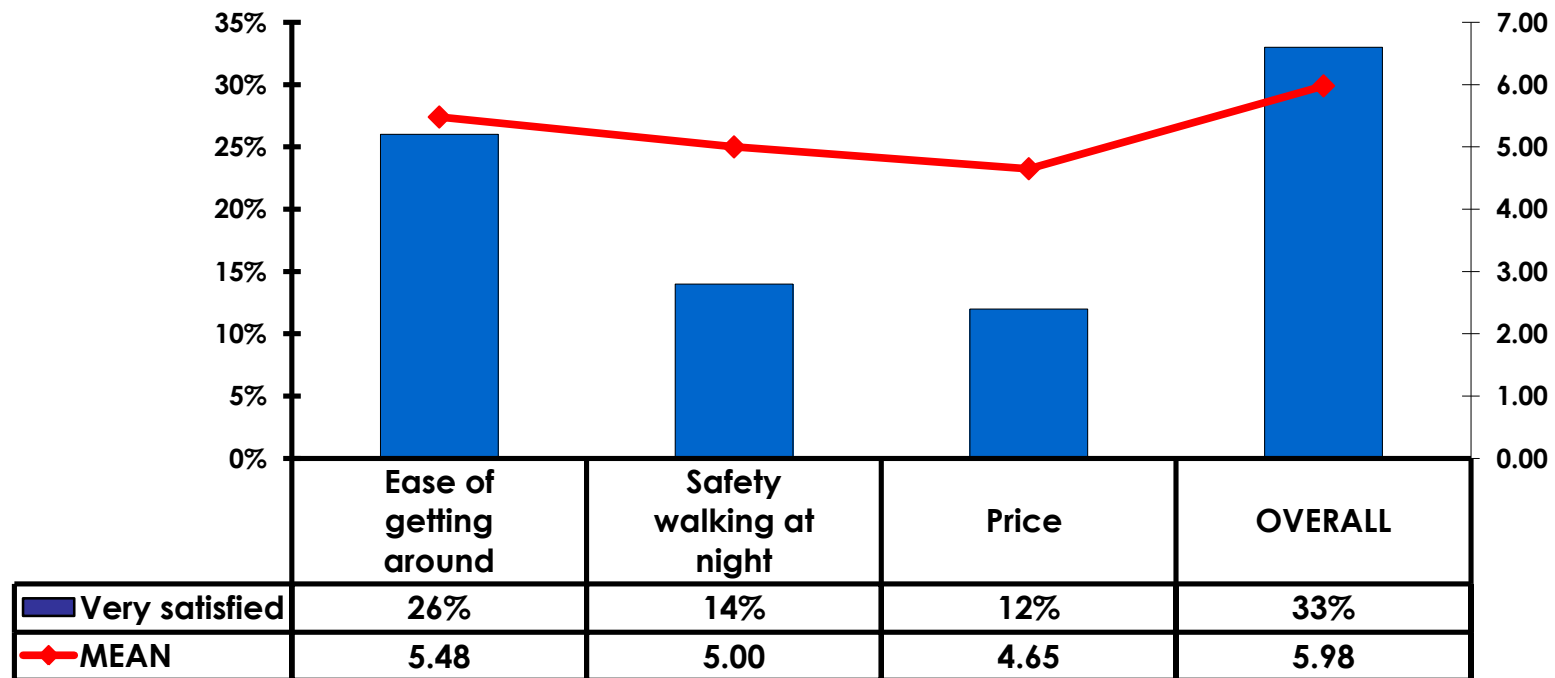
# SECTION 4 **VISITOR SATISFACTION**



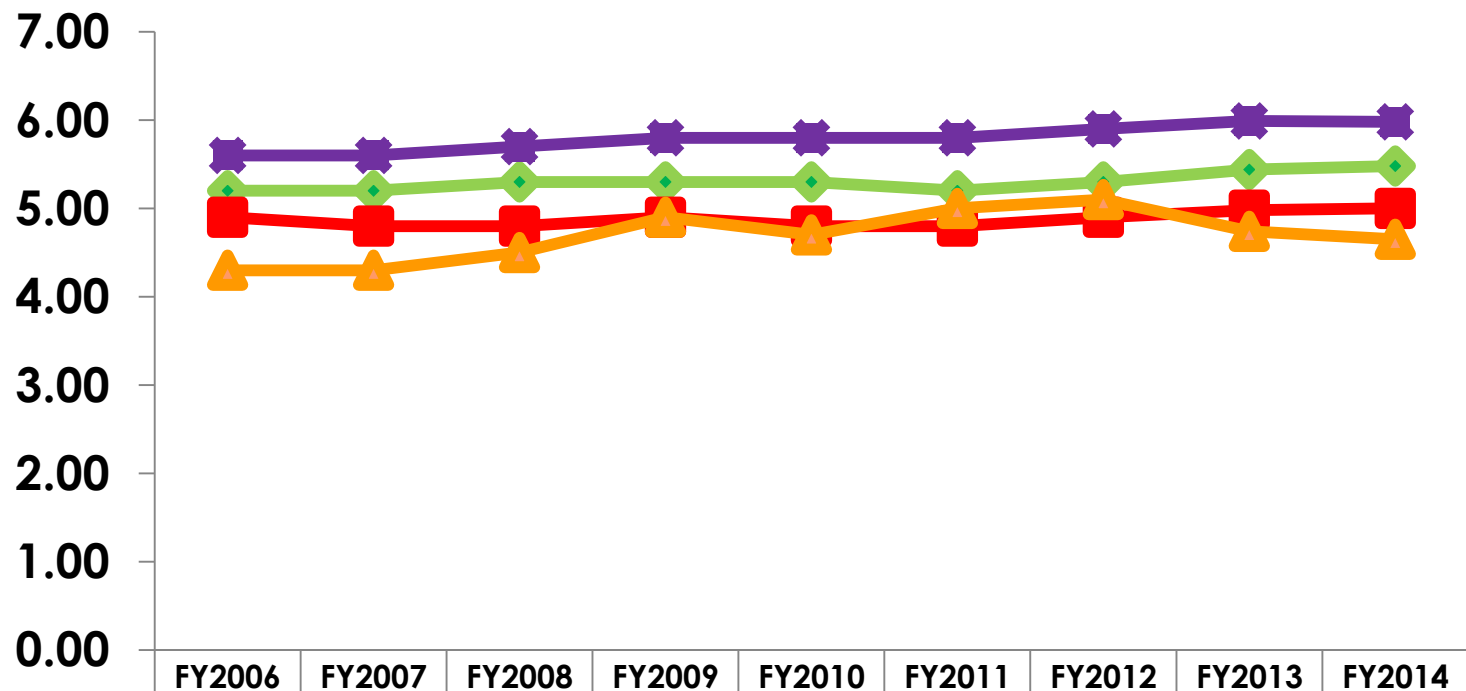
# Satisfaction Scores Overall





7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Mean

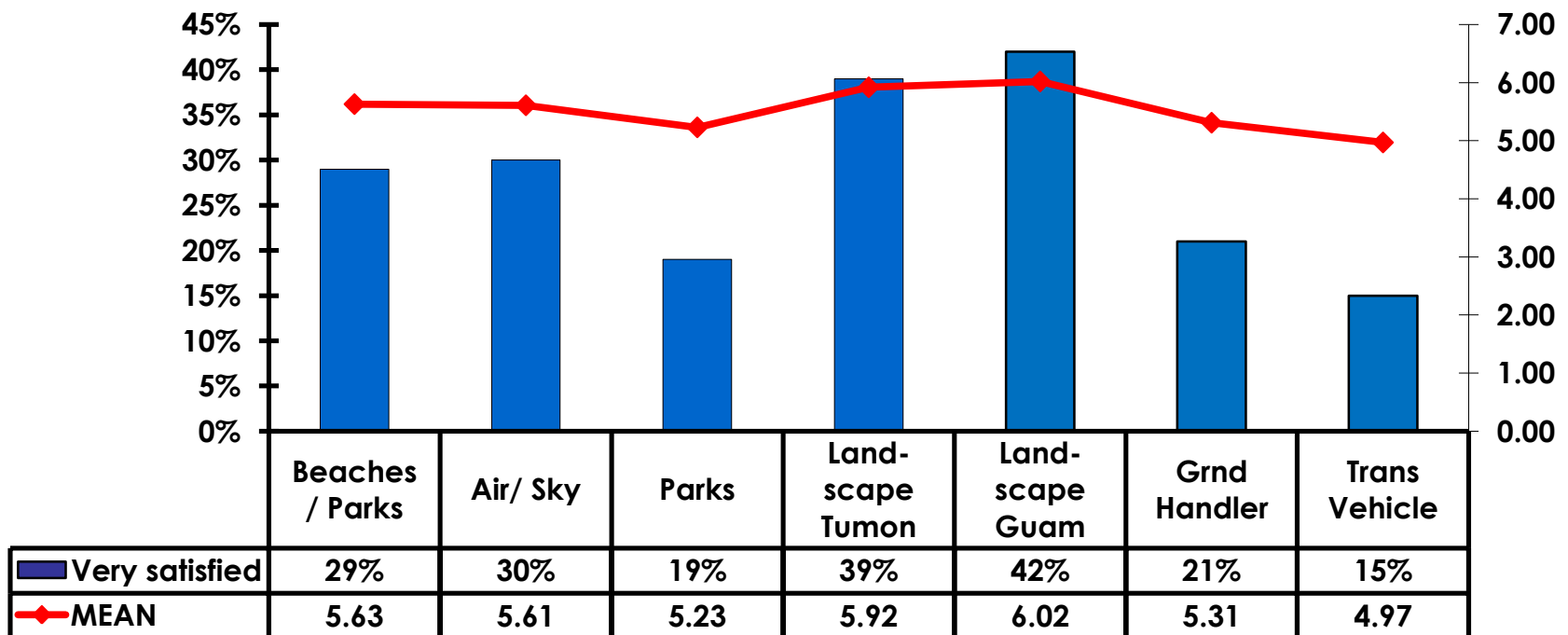


 Ease of getting around	5.20	5.20	5.30	5.30	5.30	5.20	5.30	5.44	5.48
 Safety walking at night	4.90	4.80	4.80	4.90	4.80	4.80	4.90	4.98	5.00
 Price	4.30	4.30	4.50	4.90	4.70	5.00	5.10	4.74	4.65
 OVERALL	5.60	5.60	5.70	5.80	5.80	5.80	5.90	5.99	5.98

# Satisfaction Quality/ Cleanliness

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

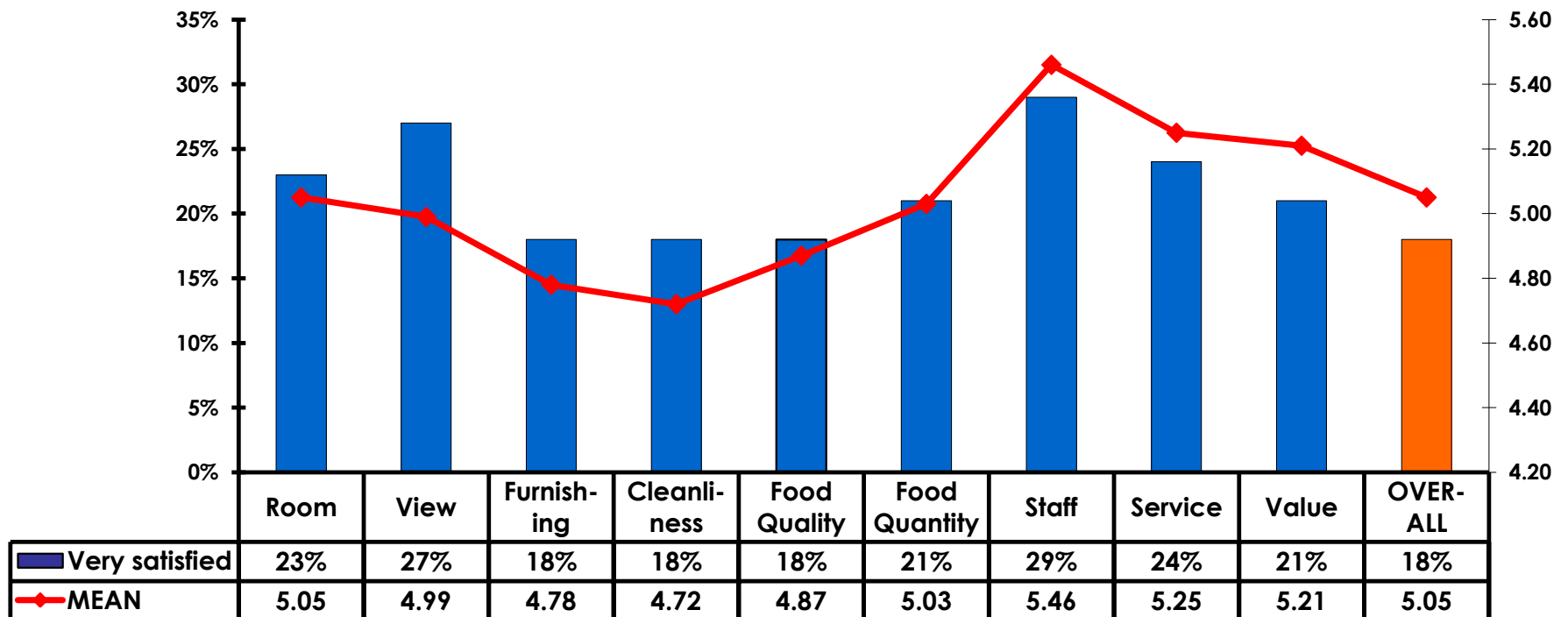


	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
Beaches/ Parks	5.50	5.40	5.40	5.50	5.50	5.50	5.60	5.68	5.63
Air/ Sky								5.64	5.61
Parks								5.23	5.23
Landscape Tumon								5.97	5.92
Landscape Guam								6.05	6.02
Grnd Handler								5.25	5.31
Trans Vehicle								4.83	4.97

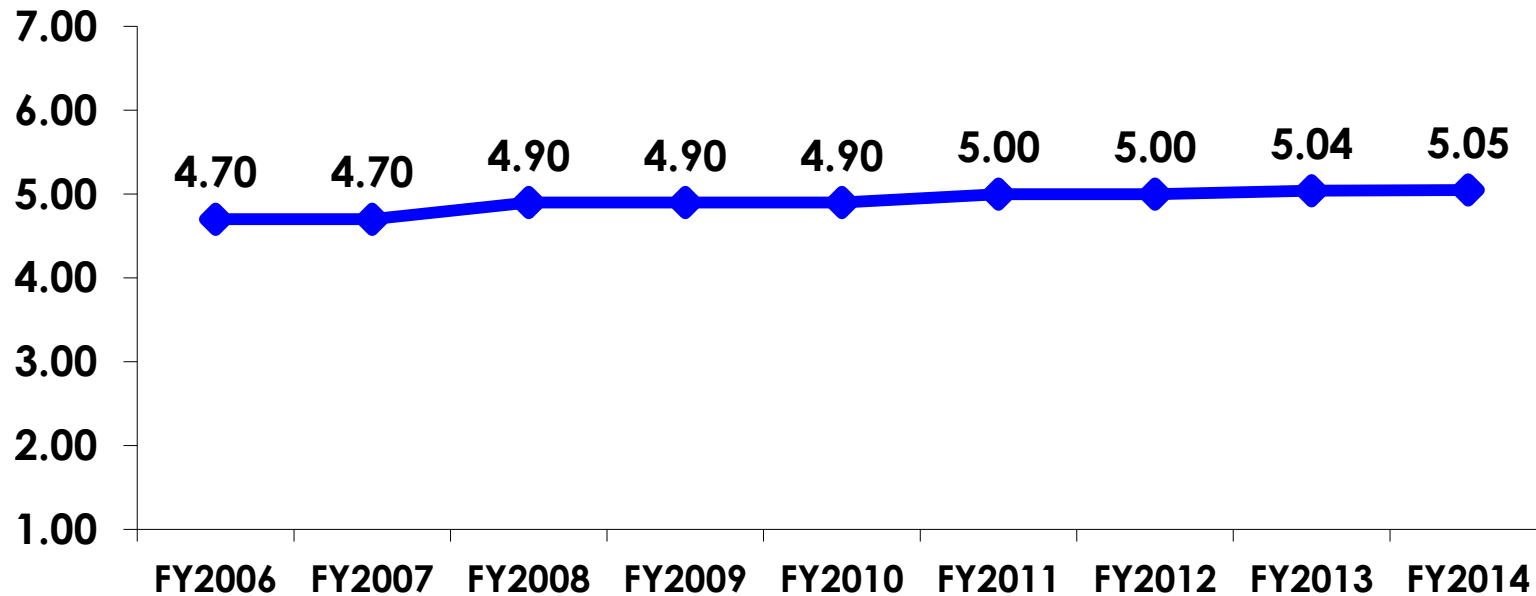
# Quality of Accommodations

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



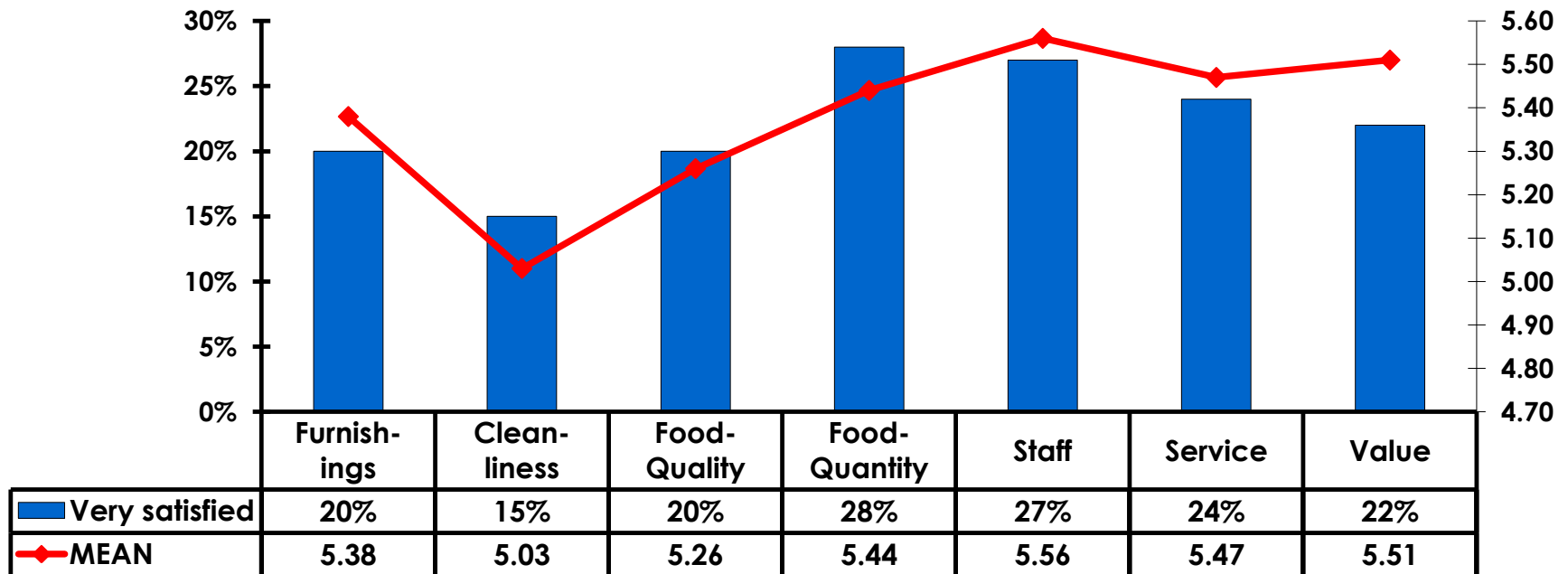
# ACCOMMODATIONS OVERALL SATISFACTION



# Quality of Dining Experience

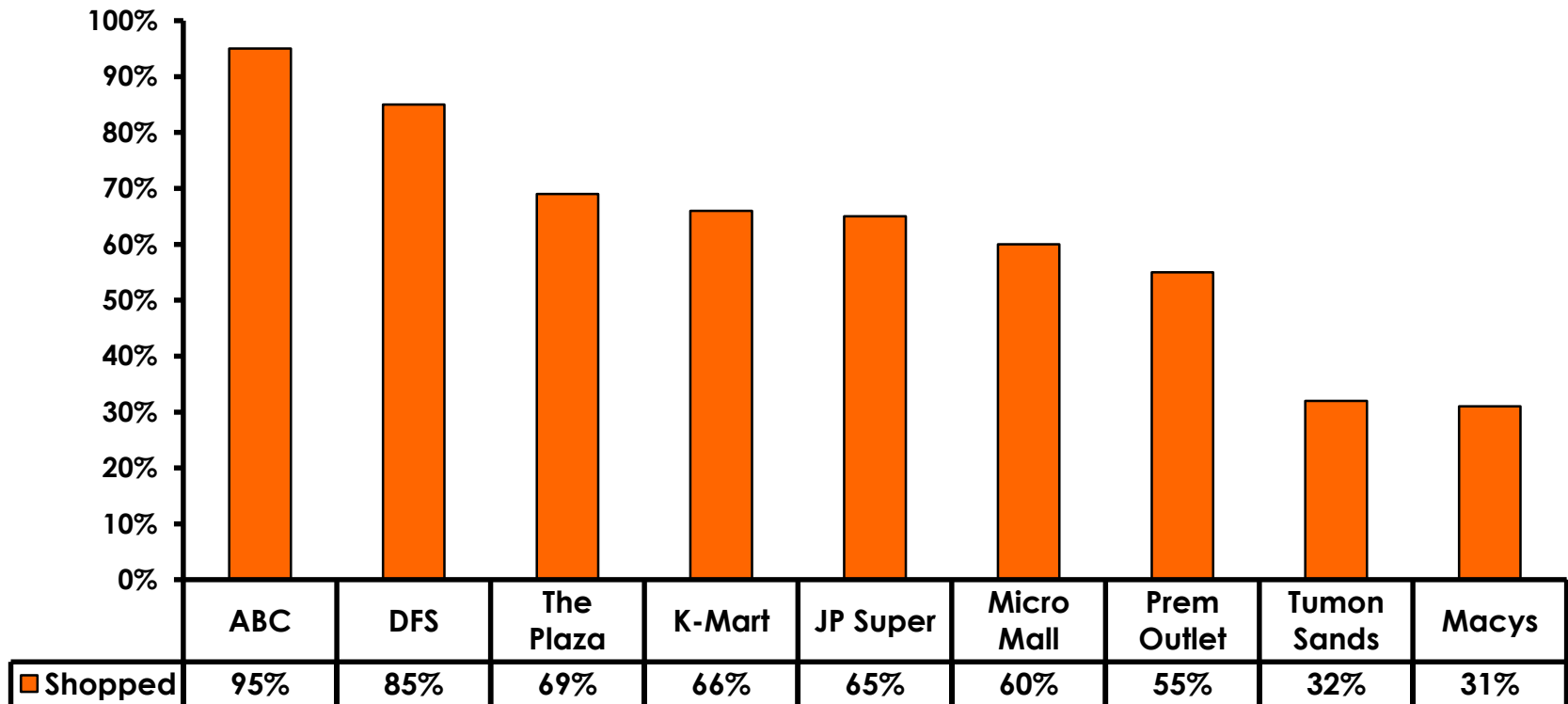
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses





# Shopping Mall - Top 6

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
<b>ABC</b>	94%	95%	96%	95%	94%	94%	95%	95%	95%
<b>DFS Galleria</b>	95%	95%	94%	92%	89%	91%	90%	87%	85%
<b>The Plaza</b>	54%	56%	60%	60%	57%	62%	66%	67%	69%
<b>JP Super</b>	Not top6	Not top6	Not top6	Not top6	Not top6	63%	71%	67%	65%
<b>K-Mart</b>	55%	58%	66%	61%	64%	64%	62%	66%	66%
<b>Micro Mall</b>	66%	70%	72%	71%	65%	64%	65%	64%	60%
<b>Prem Outlet</b>	59%	56%	63%	64%	58%	Not top6	Not top6	Not top6	Not top6

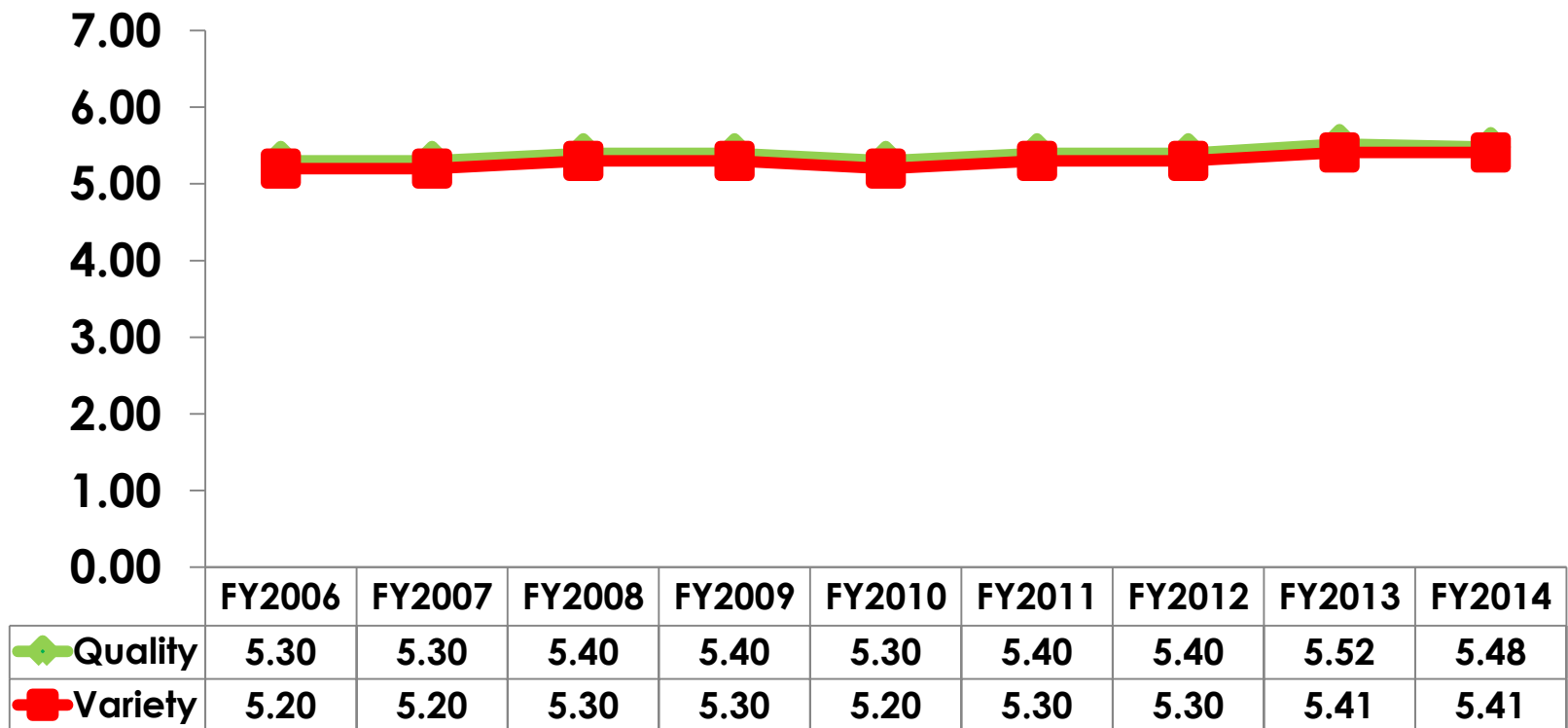
# Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

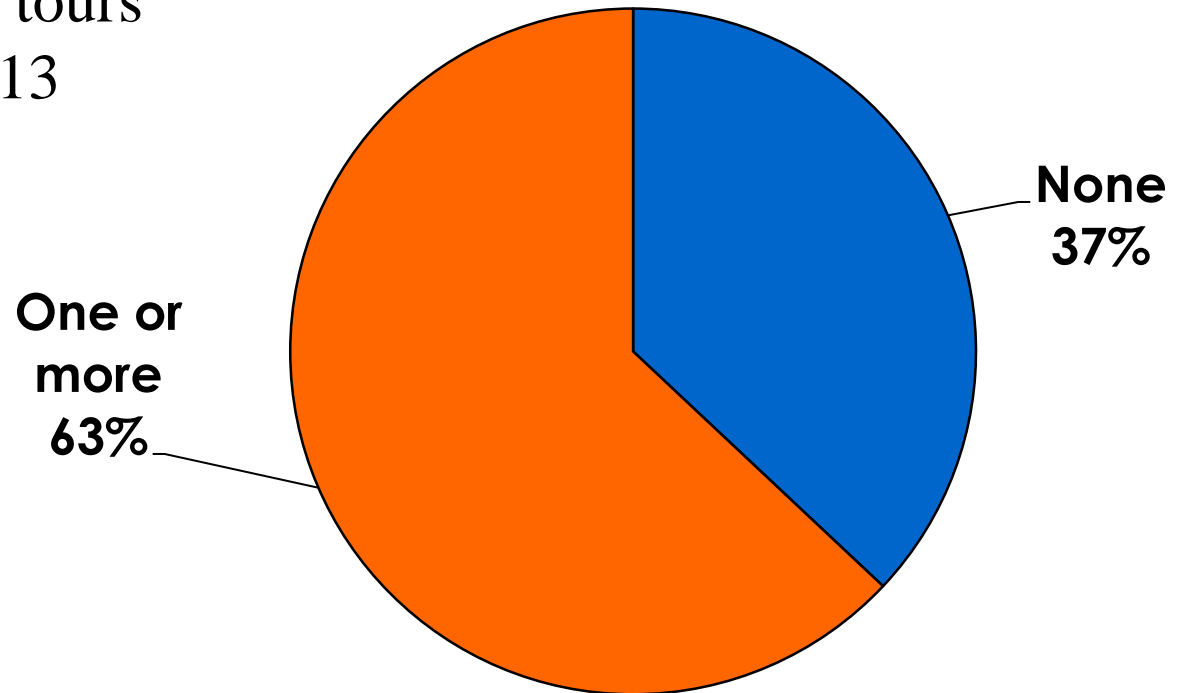
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>55%</b>	Score of 6 to 7 = <b>53%</b>
Score of 4 to 5 = <b>41%</b>	Score of 4 to 5 = <b>41%</b>
Score 1 to 3 = <b>3%</b>	Score 1 to 3 = <b>5%</b>
<b>MEAN = 5.48</b>	<b>MEAN = 5.41</b>

# Satisfaction - Shopping

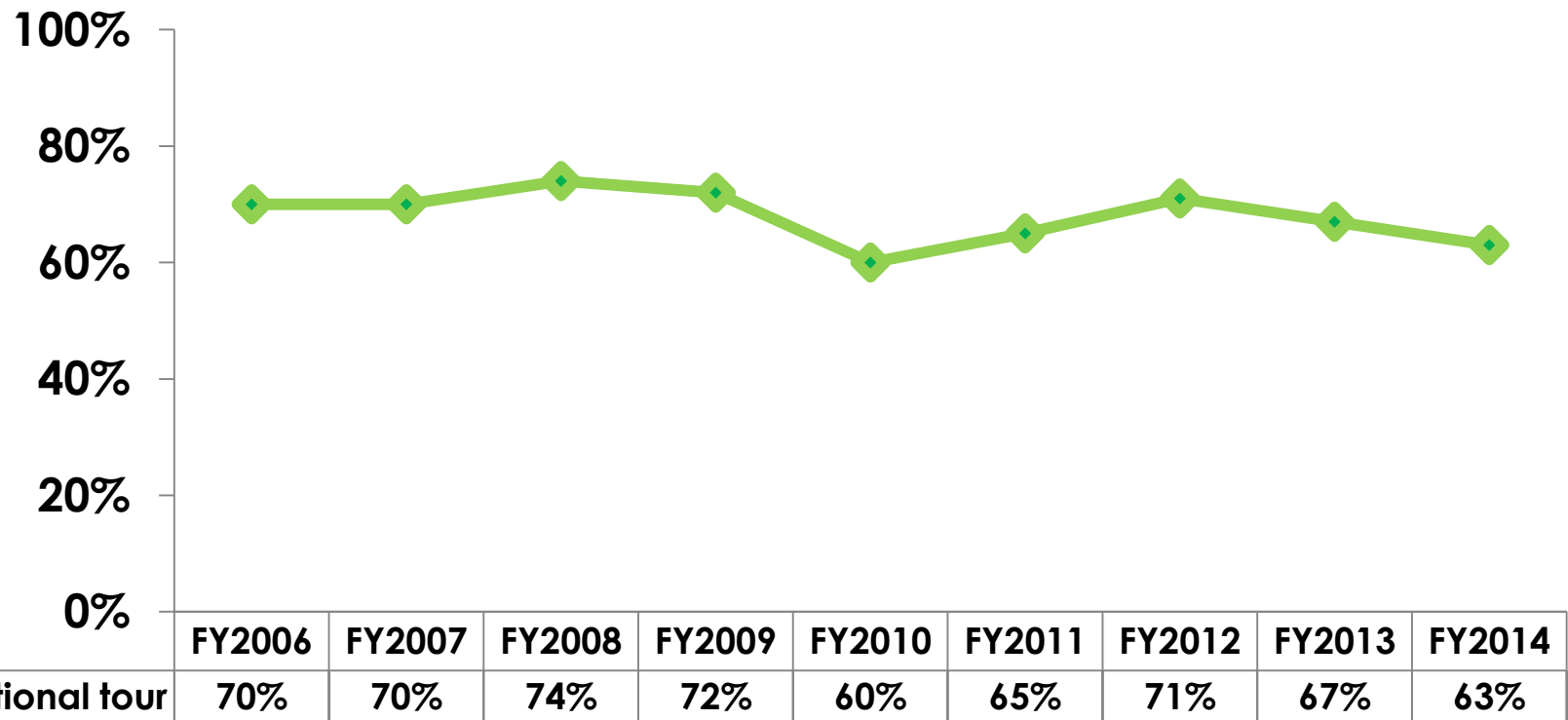


# Optional Tour Participation

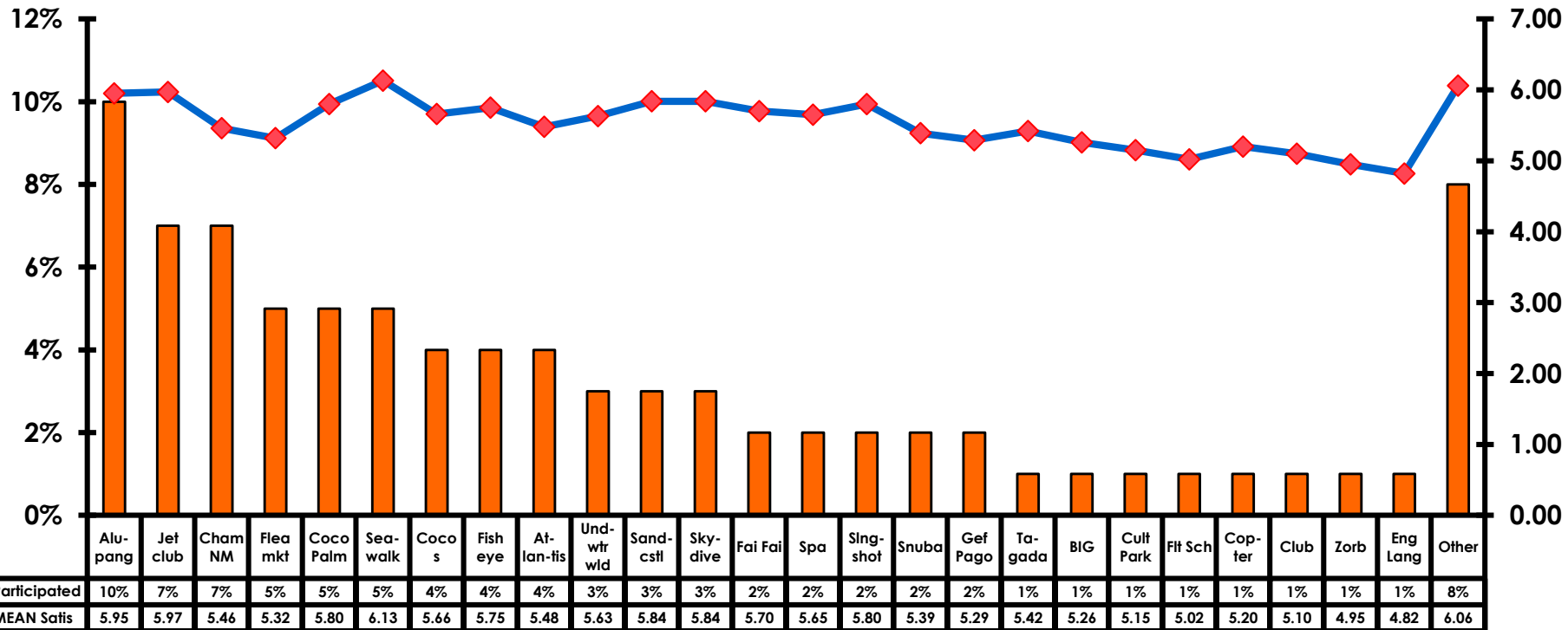
- Average number of tours participated in is 1.13



# Optional Tours



# Optional Tours Participation & Satisfaction



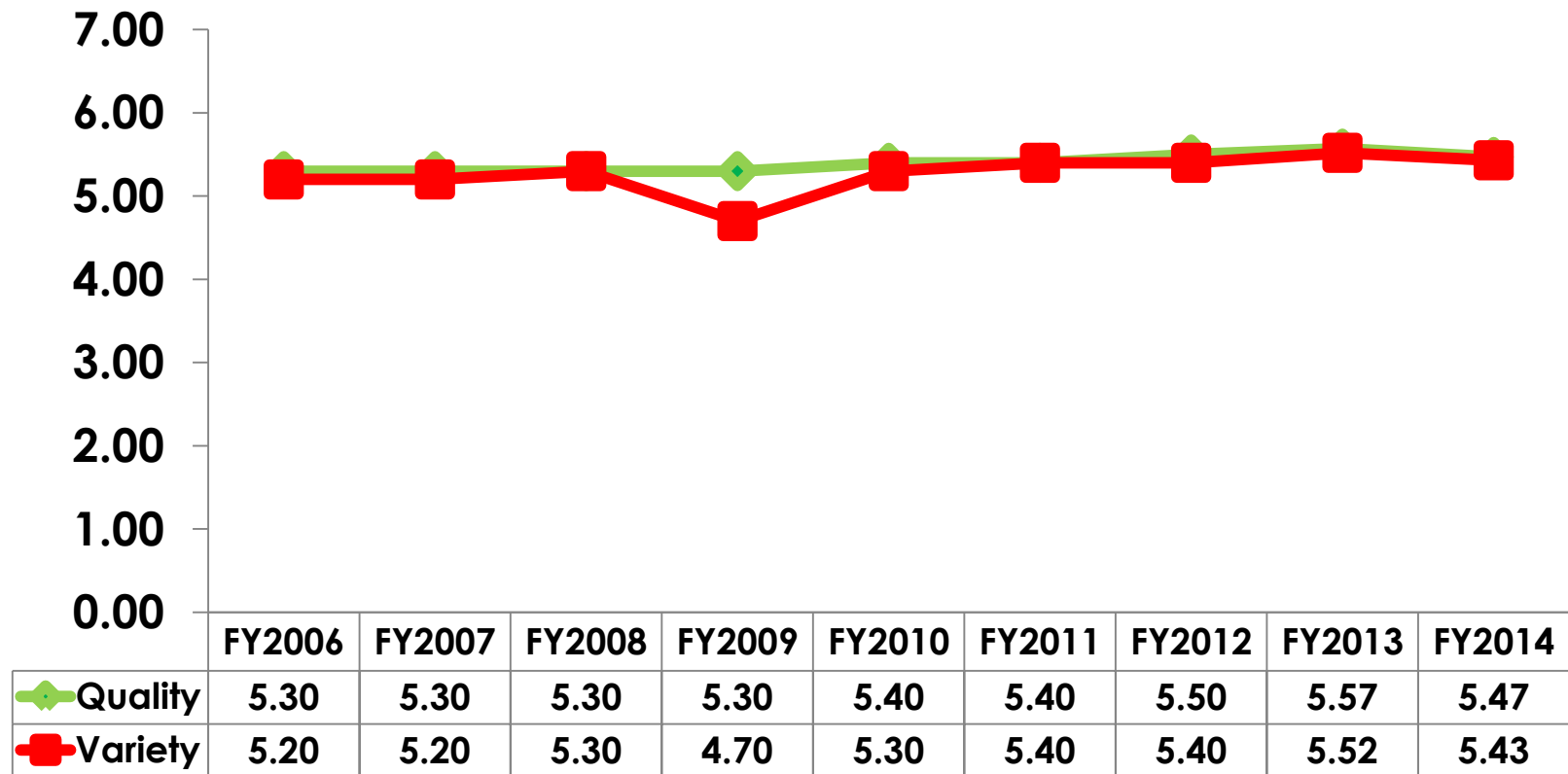
# Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = <b>55%</b>	Score of 6 to 7 = <b>54%</b>
Score of 4 to 5 = <b>42%</b>	Score of 4 to 5 = <b>44%</b>
Score 1 to 3 = <b>3%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 5.47</b>	<b>MEAN = 5.43</b>

# Satisfaction – Day Tours





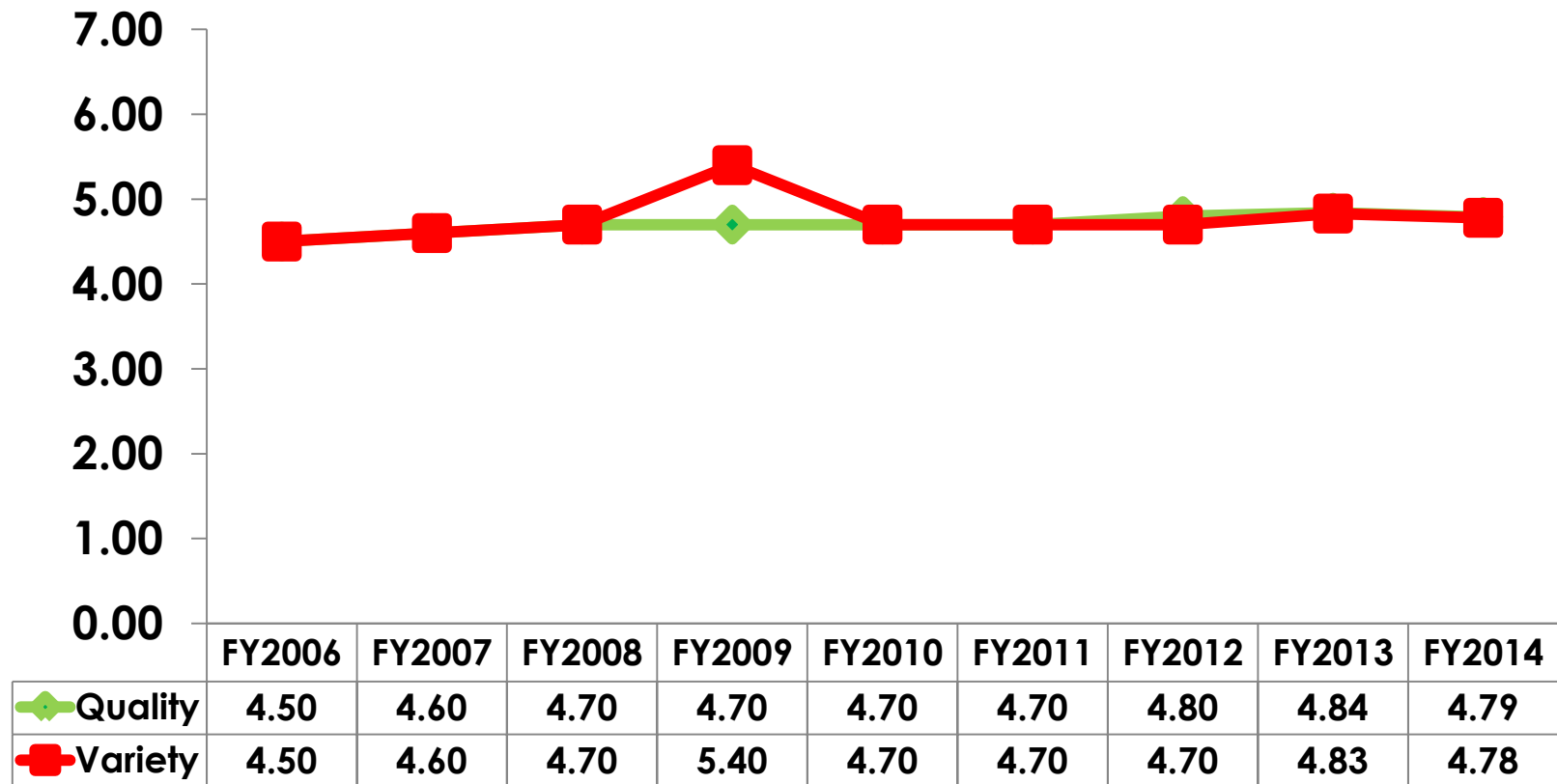
# Night Tours Satisfaction

7pt Rating Scale

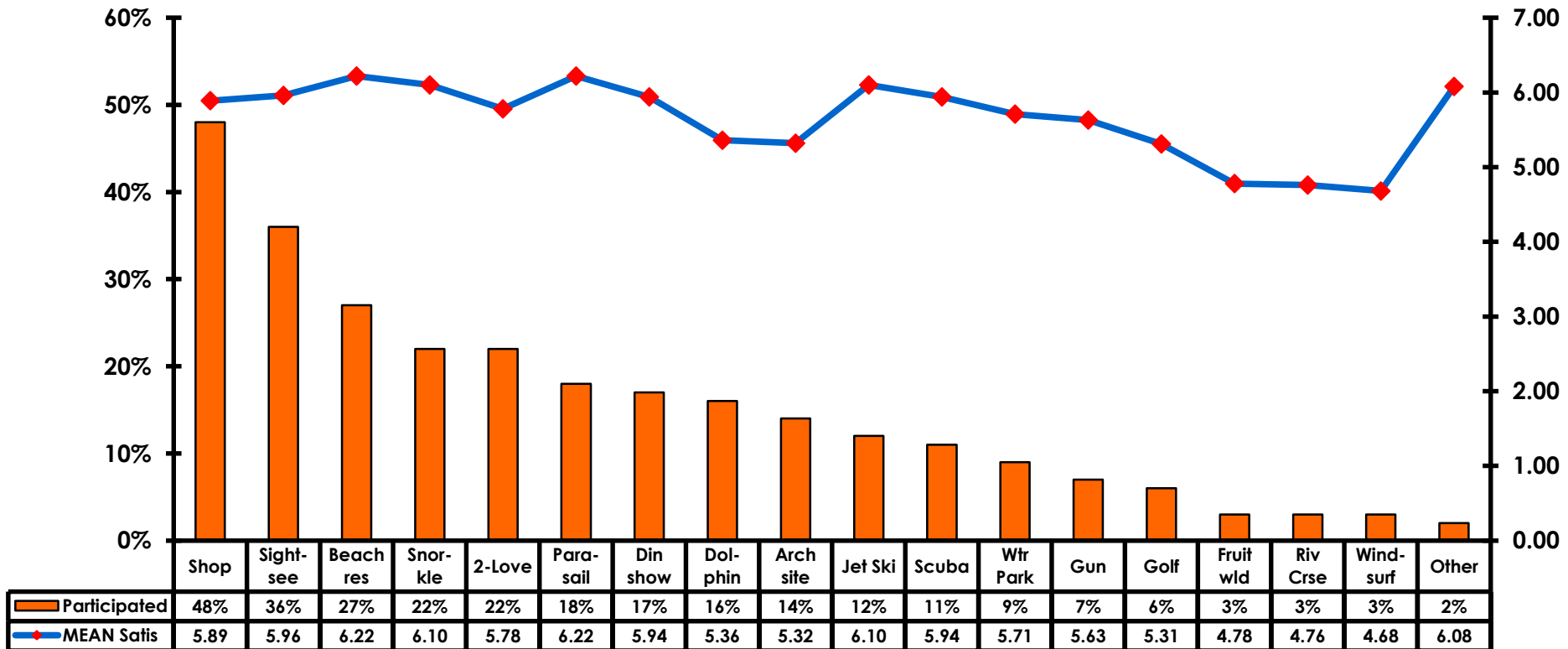
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>29%</b>	Score of 6 to 7 = <b>29%</b>
Score of 4 to 5 = <b>68%</b>	Score of 4 to 5 = <b>69%</b>
Score 1 to 3 = <b>2%</b>	Score 1 to 3 = <b>3%</b>
<b>MEAN = 4.79</b>	<b>MEAN = 4.78</b>

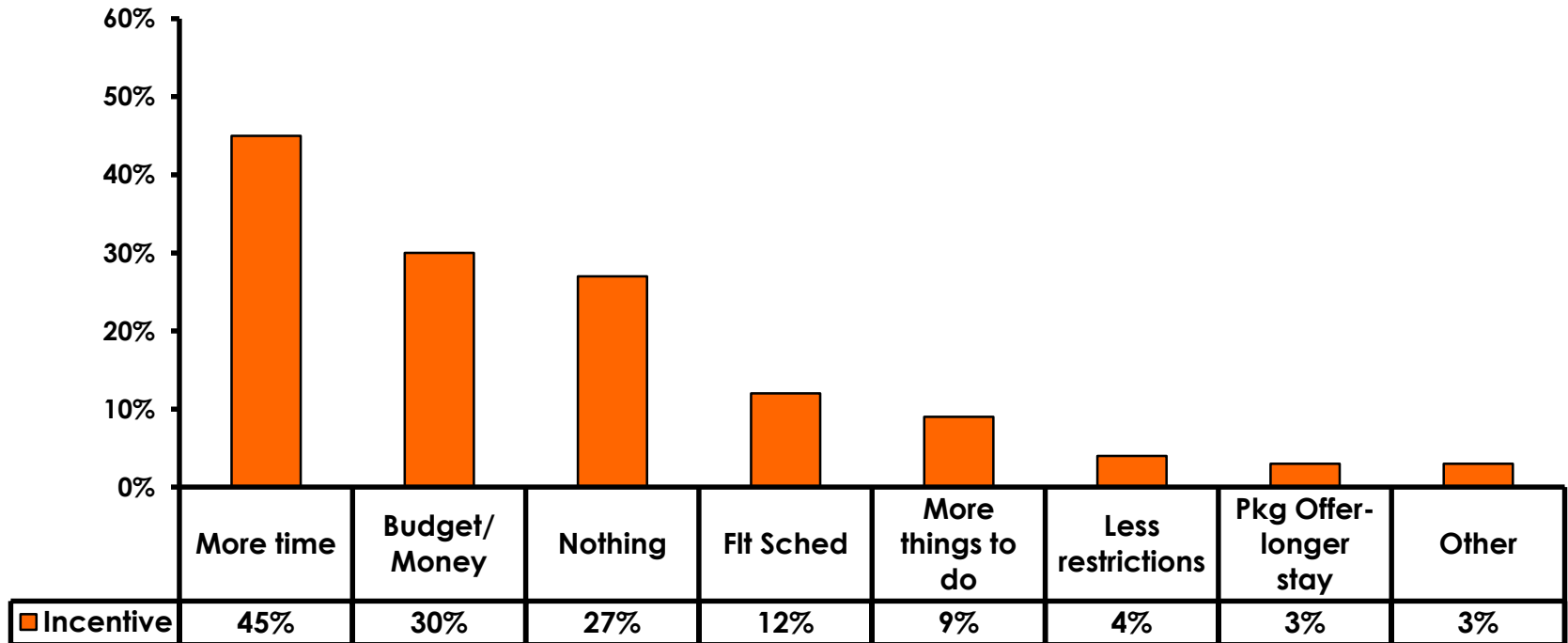
# Satisfaction – Night Tours



# Satisfaction with Other Activities



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



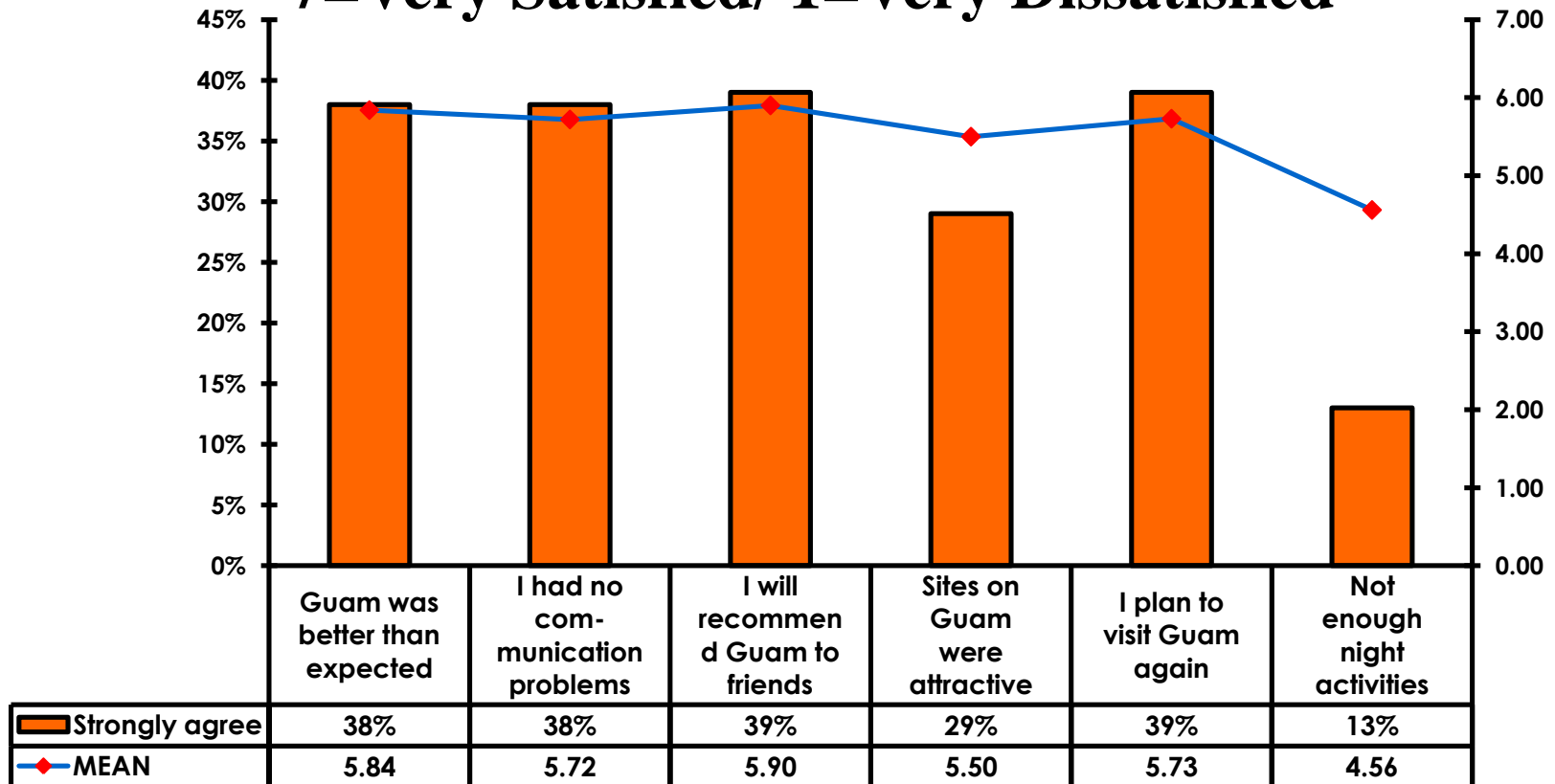
# What would it take to make you want to stay an extra day in Guam?

	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
More time	46%	52%	51%	48%	48%	45%
Budget/ money	35%	31%	35%	34%	29%	30%
Nothing- spent right amount of time	19%	17%	18%	19%	24%	27%
More things to do	12%	11%	9%	12%	9%	9%
Less restrictions	7%	6%	5%	6%	4%	4%
Flight schedule times	14%	17%	20%	16%	14%	12%
Packages – longer stays	-	-	1%	4%	3%	3%
Other	5%	4%	3%	3%	2%	3%

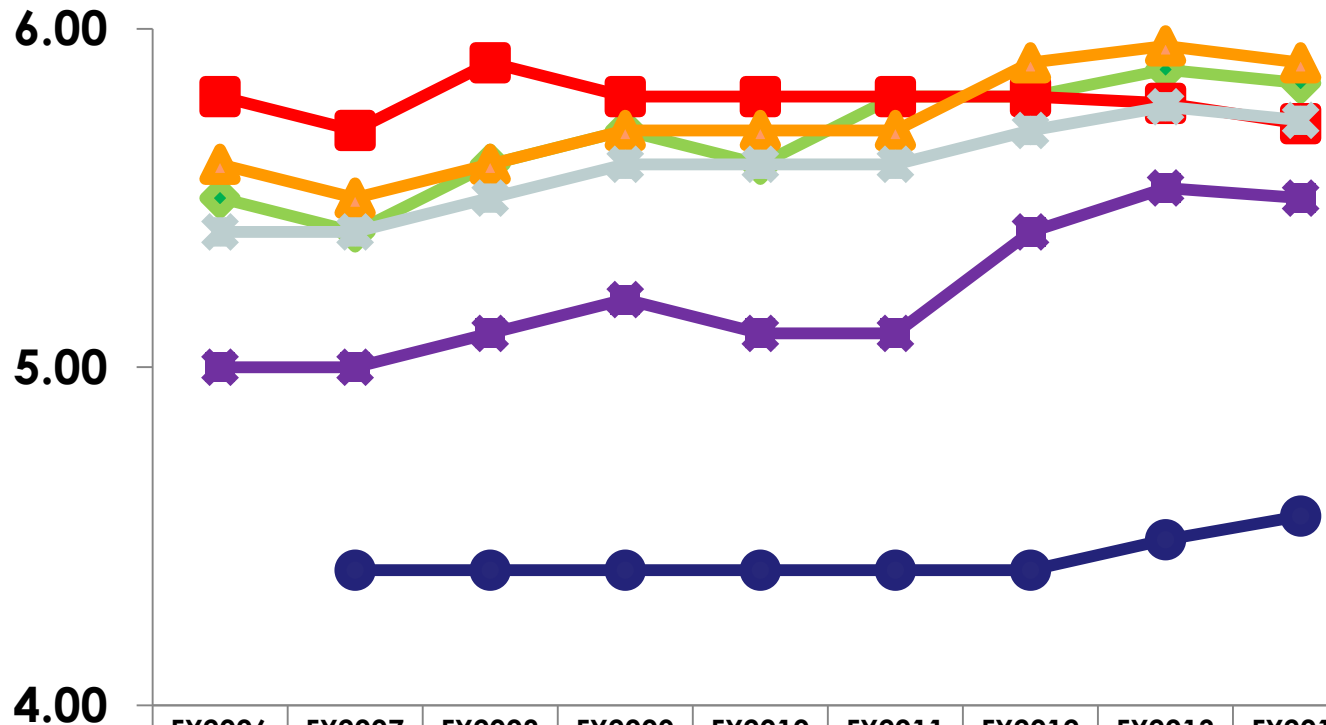
# On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



# On-Island Perceptions

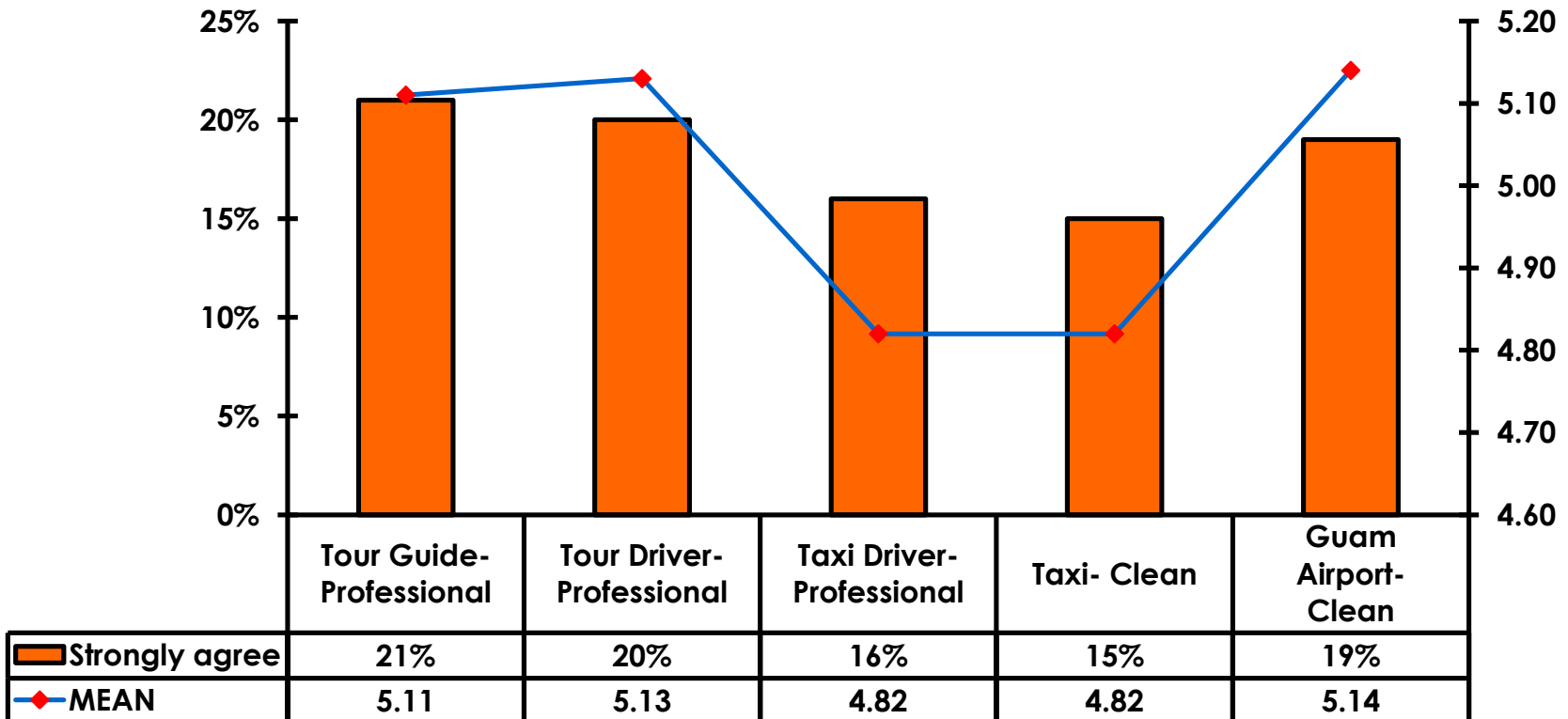


	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
Guam was better than expected	5.50	5.40	5.60	5.70	5.60	5.80	5.80	5.88	5.84
I had no communication problems	5.80	5.70	5.90	5.80	5.80	5.80	5.80	5.78	5.72
I will recommend Guam to friends	5.60	5.50	5.60	5.70	5.70	5.70	5.90	5.95	5.90
Sites on Guam were attractive	5.00	5.00	5.10	5.20	5.10	5.10	5.40	5.53	5.50
I plan to visit Guam again	5.40	5.40	5.50	5.60	5.60	5.60	5.70	5.77	5.73
Not enough night activities		4.40	4.40	4.40	4.40	4.40	4.40	4.49	4.56

# On-Island Perceptions

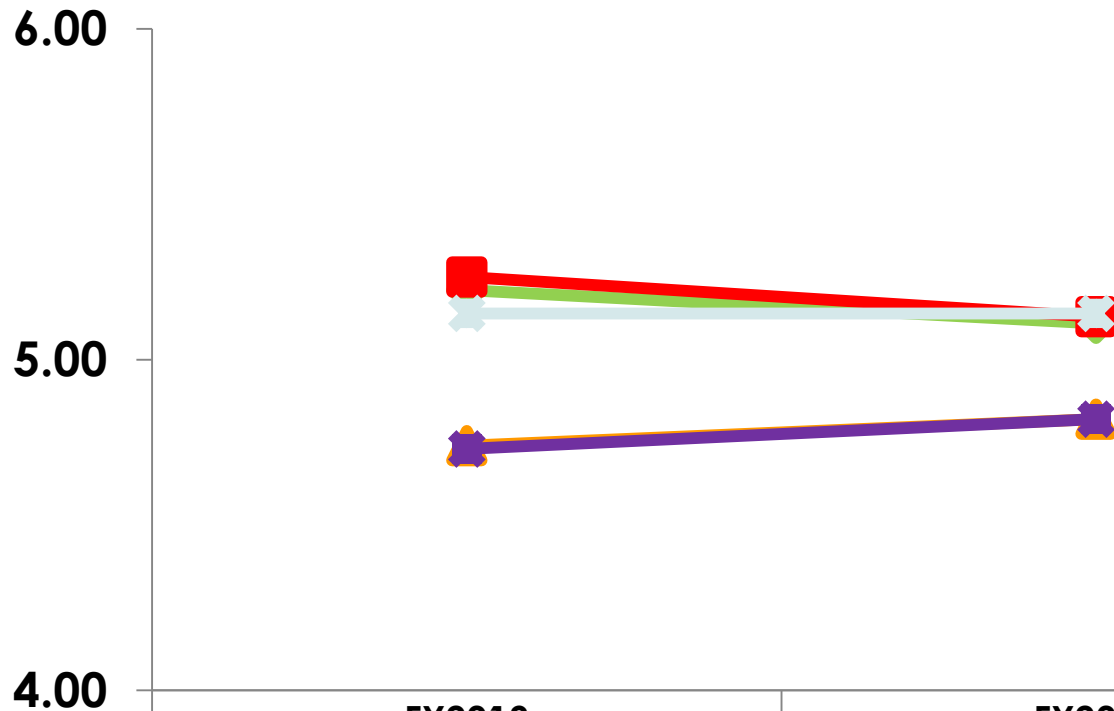
7pt Rating Scale






7=Very Satisfied/ 1=Very Dissatisfied





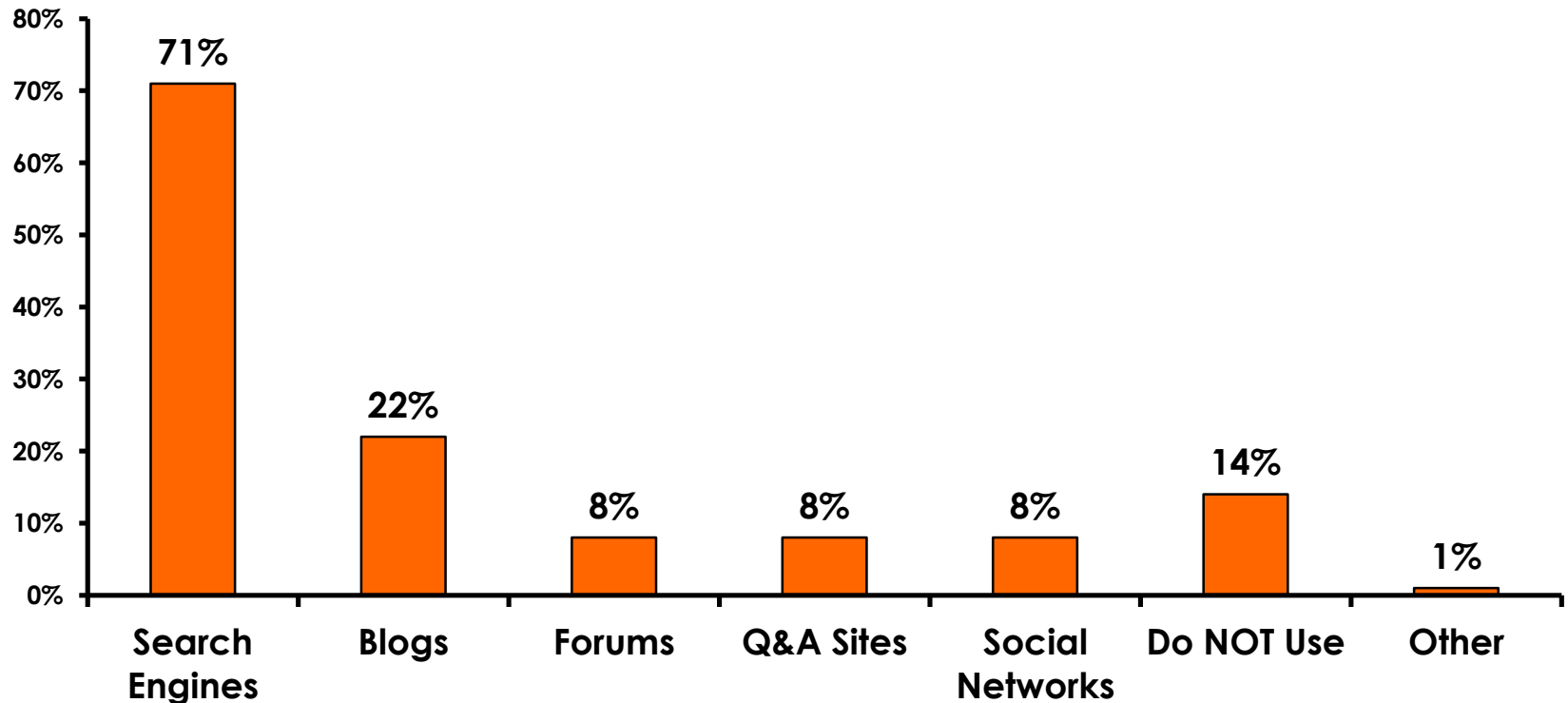
# On-Island Perceptions



	FY2013	FY2014
 Tour Guide- professional	5.21	5.11
 Tour Driver- professional	5.25	5.13
 Taxi - Professional	4.74	4.82
 Taxi- clean	4.73	4.82
 Guam Airport- Clean	5.14	5.14

# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info

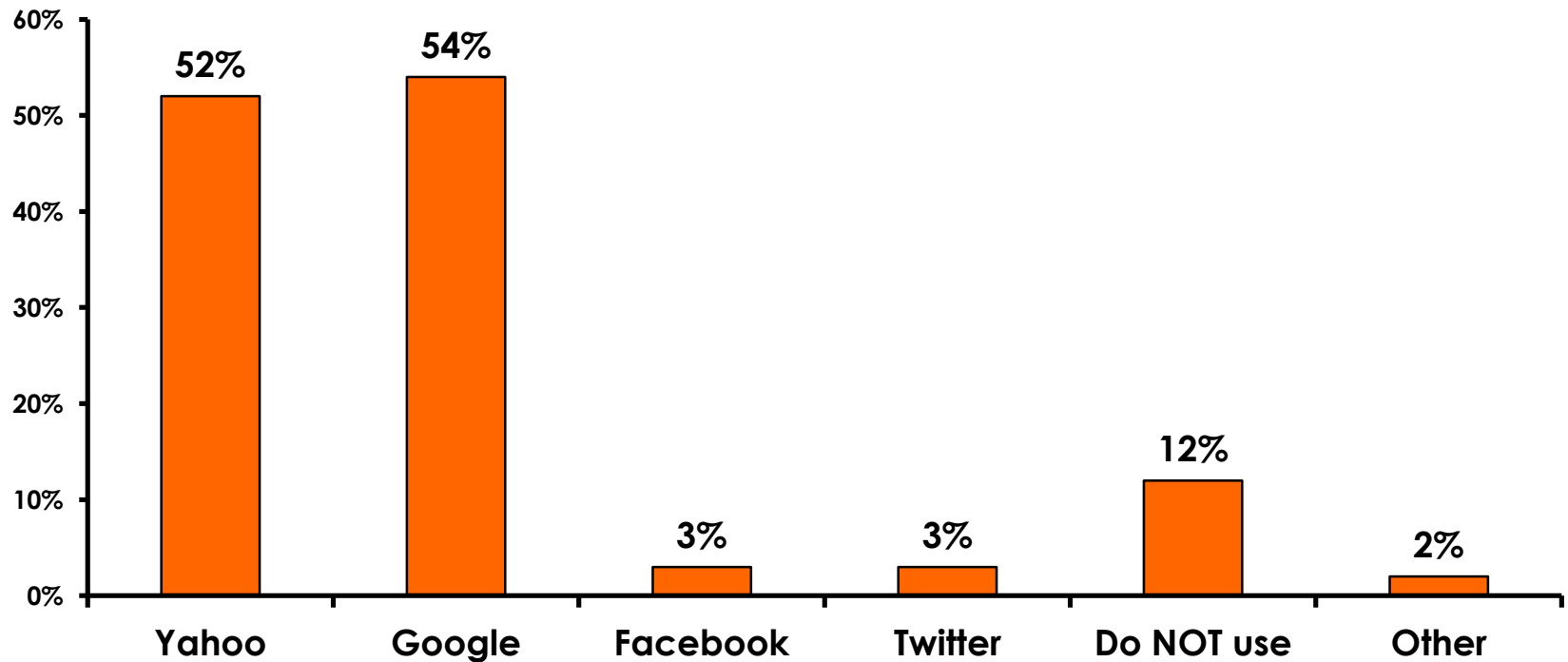


# Internet- Guam Sources of Info

	FY2013	FY2014
Search engines	70%	71%
Blogs	20%	22%
None	15%	14%
Q&A sites	10%	8%
Social Network	8%	8%
Forums	9%	8%
Other	2%	1%

# Internet- Things To Do

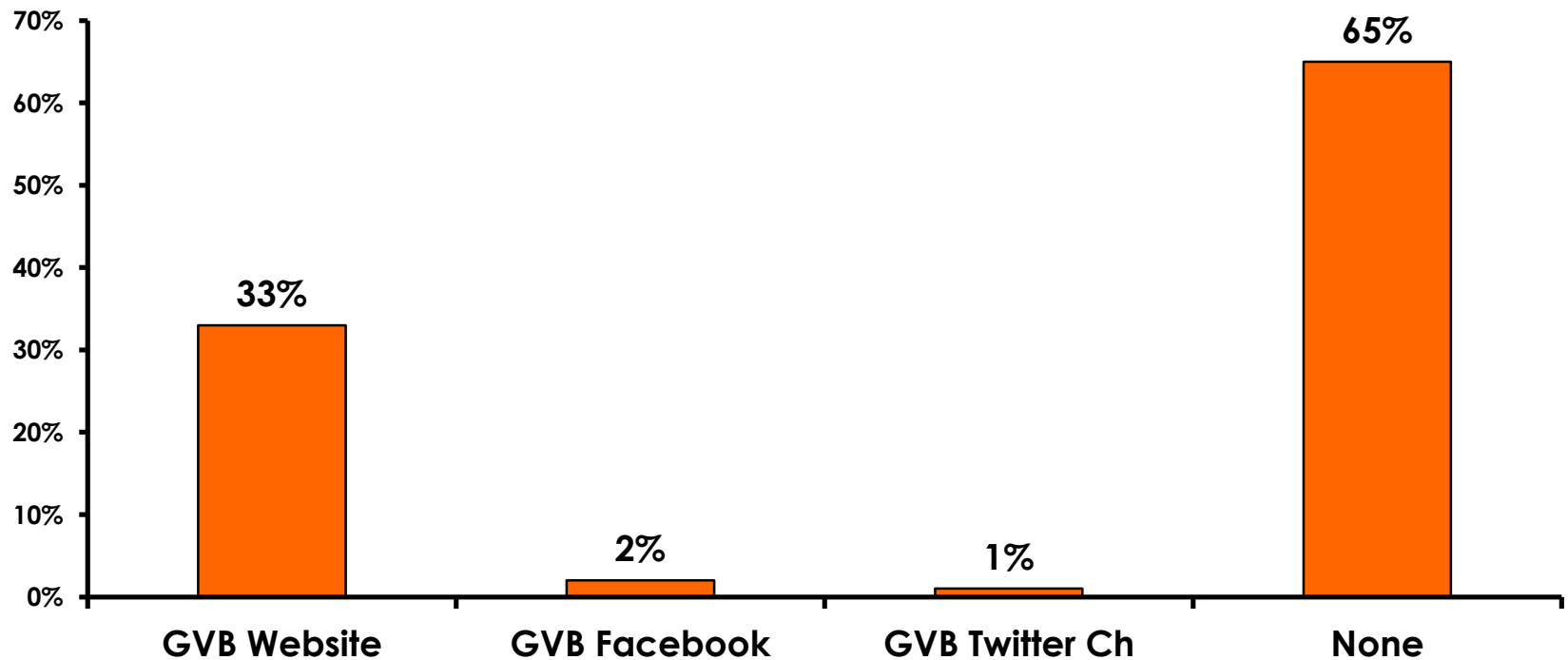
## Sources of Info



# Internet- Things To Do Sources of Info

	FY2013	FY2014
Google	50%	54%
Yahoo	55%	52%
Do Not Use Internet	15%	12%
Facebook	3%	3%
Twitter	2%	3%
Other	3%	2%

# Internet- GVB Sources

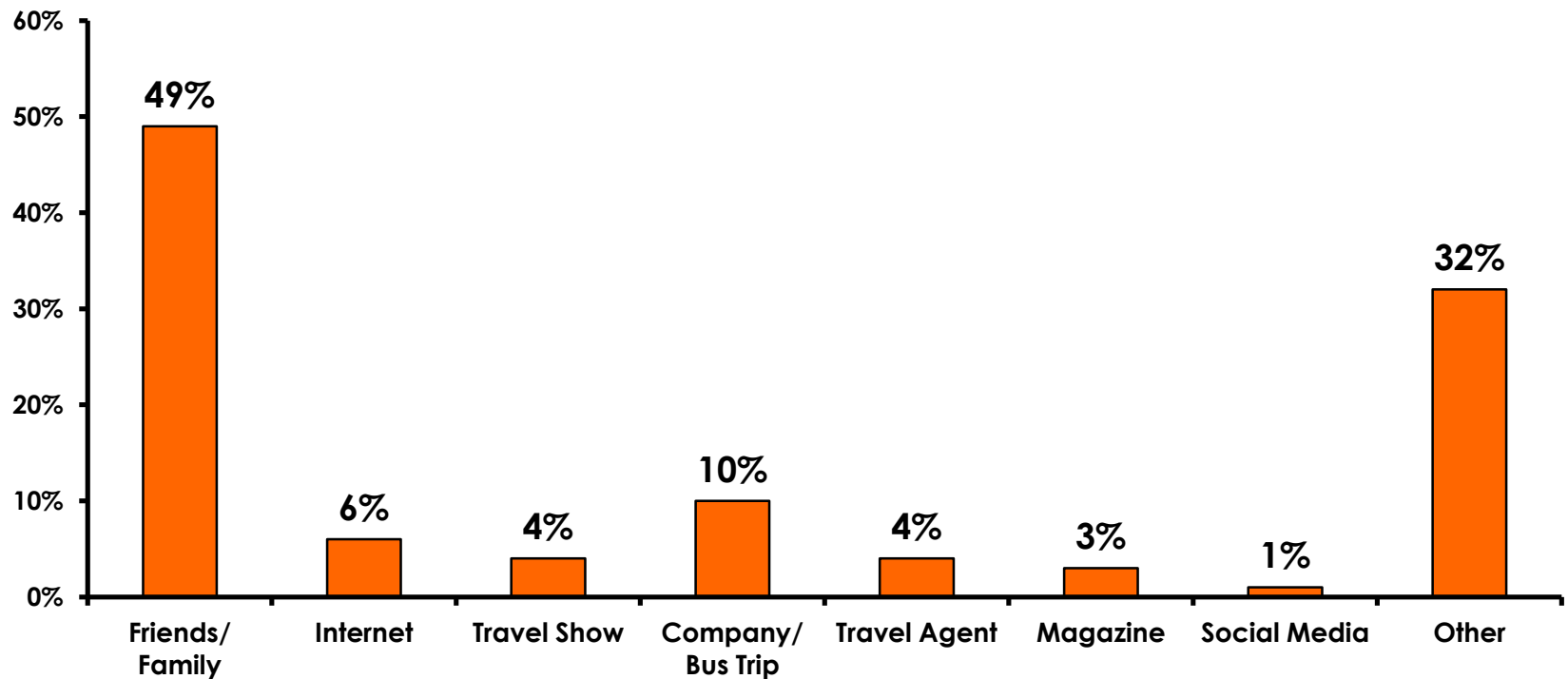


# Internet- GVB Sources

	FY2013	FY2014
None	65%	65%
GVB Website	33%	33%
GVB Facebook	2%	2%
GVB Twitter	1%	1%



# Travel Motivation- Info Sources

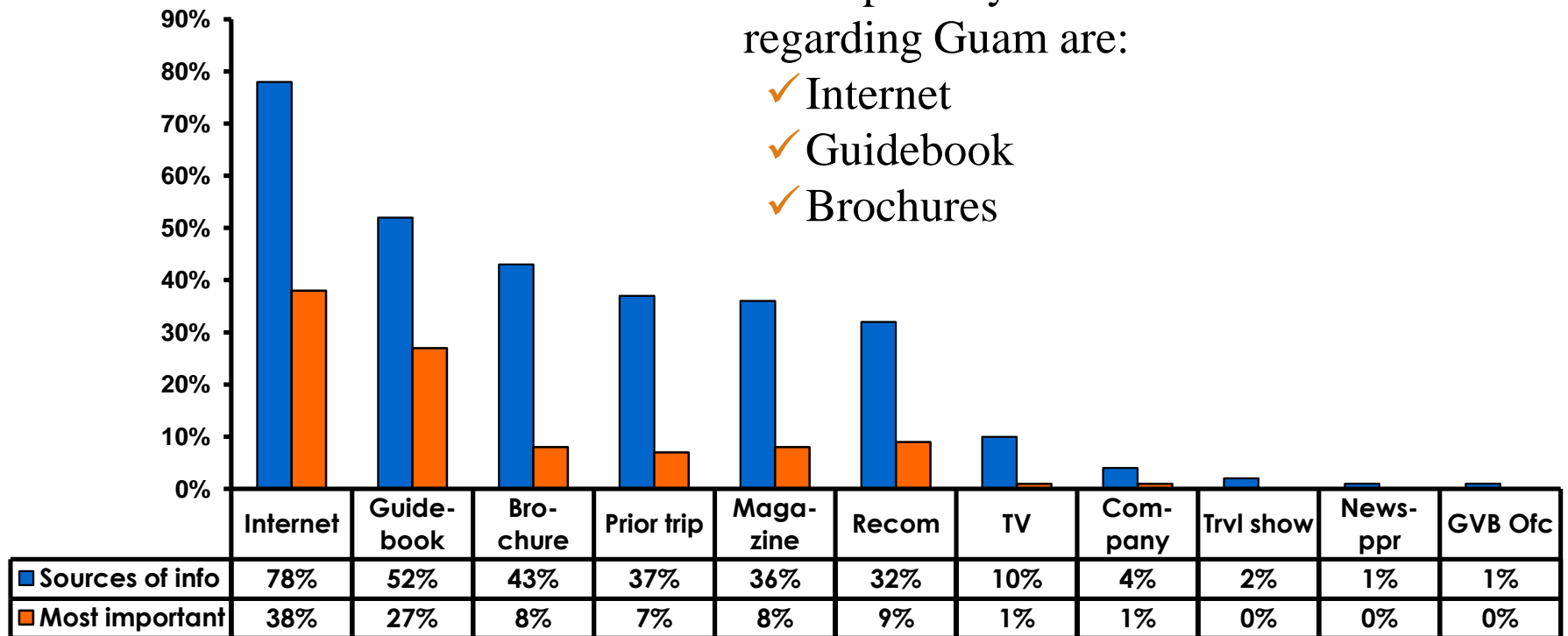


# Travel Motivation- Info Sources

	FY2013	FY2014
Friends/ Family	56%	49%
Other	23%	32%
Company/ Business trip	4%	10%
Internet	8%	6%
Travel show	8%	4%
Travel agent	6%	4%
Magazine	4%	3%
Social media	1%	1%

# Sources of Information Pre-arrival

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

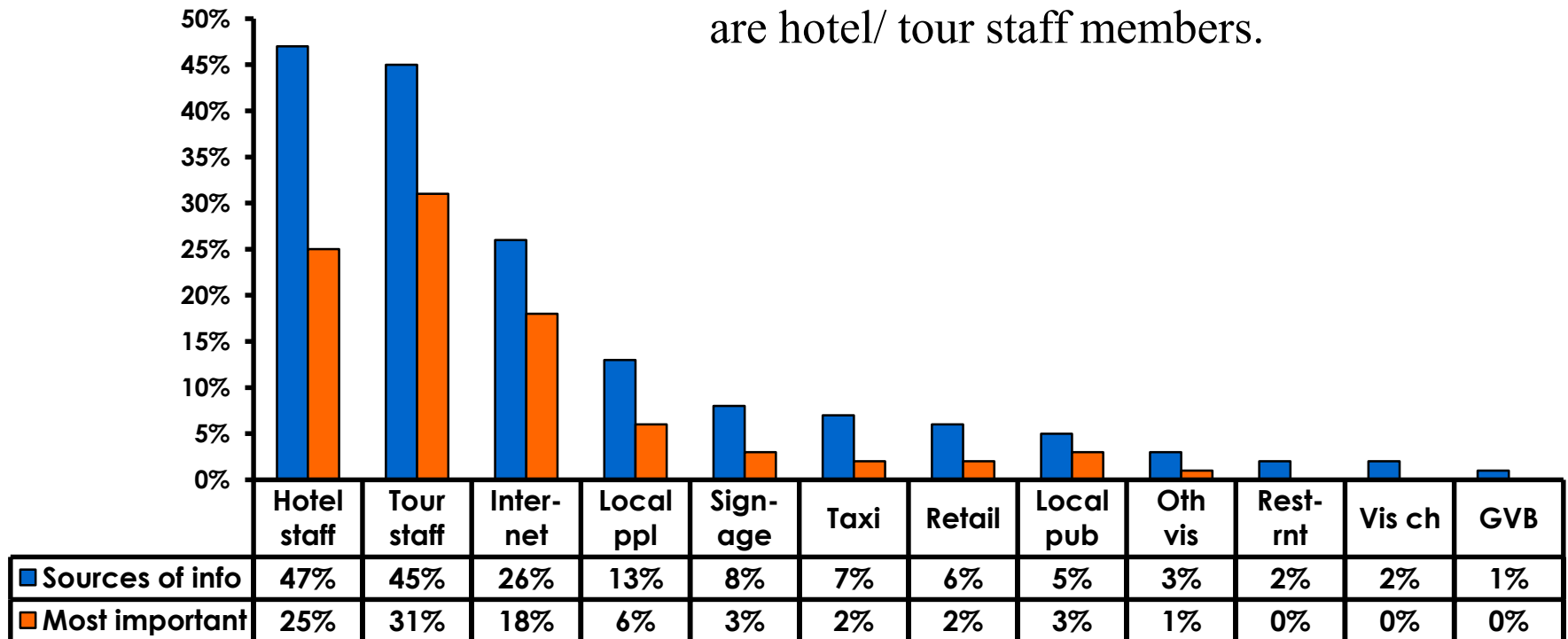


# Pre-Arrival Sources – Top 3 Most Important

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
<b>Guide-book</b>	43%	36%	41%	36%	34%	37%	39%	32%	27%
<b>Internet</b>	22%	28%	25%	30%	36%	34%	32%	33%	38%
<b>Brochure</b>	15%	16%	15%	15%	11%	12%	10%	9%	8%

# Sources of Information Post-arrival

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



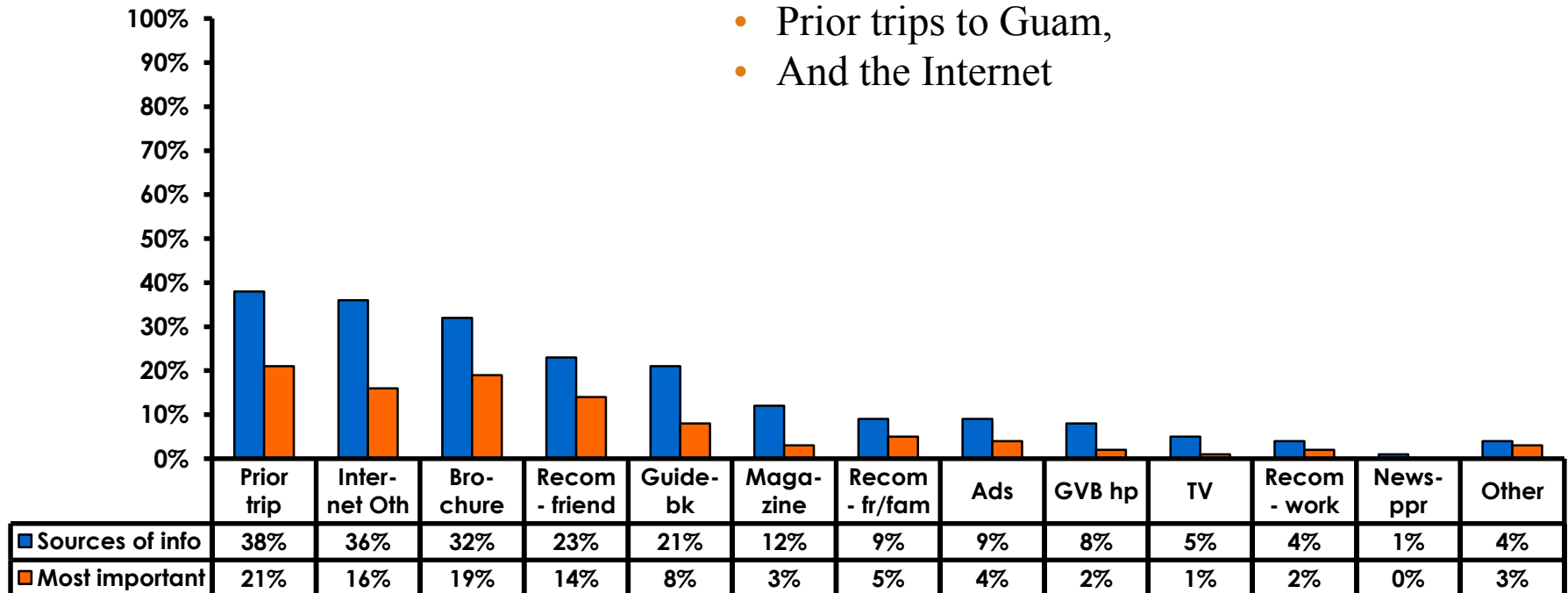
# Post-Arrival Sources – Top 3 Most Important

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
<b>Tour staff</b>	46%	42%	44%	47%	44%	46%	40%	33%	31%
<b>Hotel staff</b>	13%	16%	15%	17%	22%	22%	21%	25%	25%
<b>Internet</b>								11%	18%
<b>Signage</b>	6%	Not top 3	Not top 3	6%	7%	Not top 3	6%	Not top 3	Not top 3
<b>Vis Ch.</b>	Not top 3	9%	10%	6%	Not top3	Not top 3	Not top 3	Not top 3	Not top 3
<b>Local ppl</b>	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	7%	6%	Not top 3	Not top 3

# Sources of Information - Motivation

The primary motivational sources of information were.

- Brochures,
- Prior trips to Guam,
- And the Internet



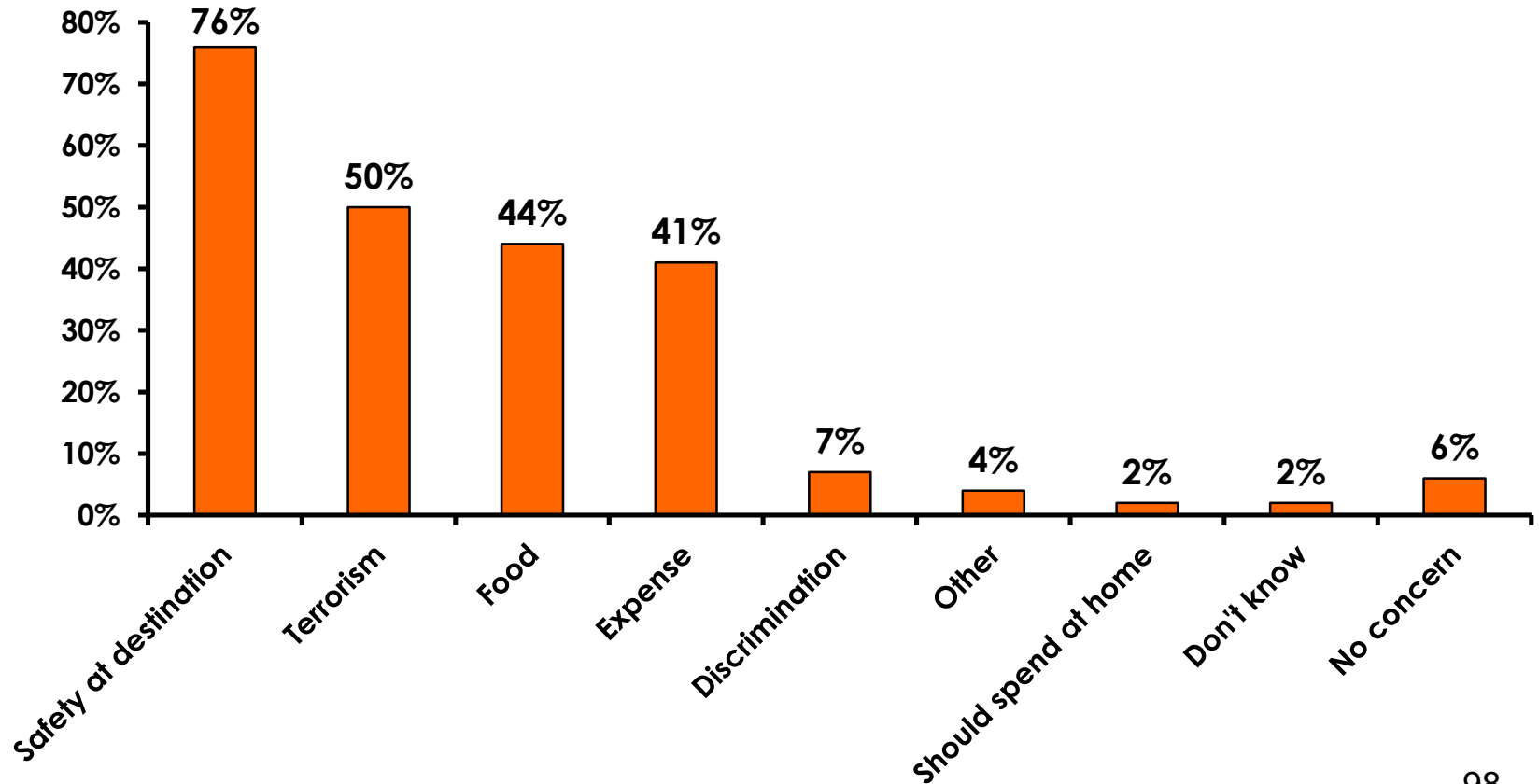
# Sources of Information – Motivation – Most Important

	FY2013	FY2014
Prior Trip	18%	21%
Travel agent brochure	22%	19%
Internet-Other Guam	15%	16%



# SECTION 6 **OTHER ISSUES**

# Concerns about travel outside of Japan - Overall



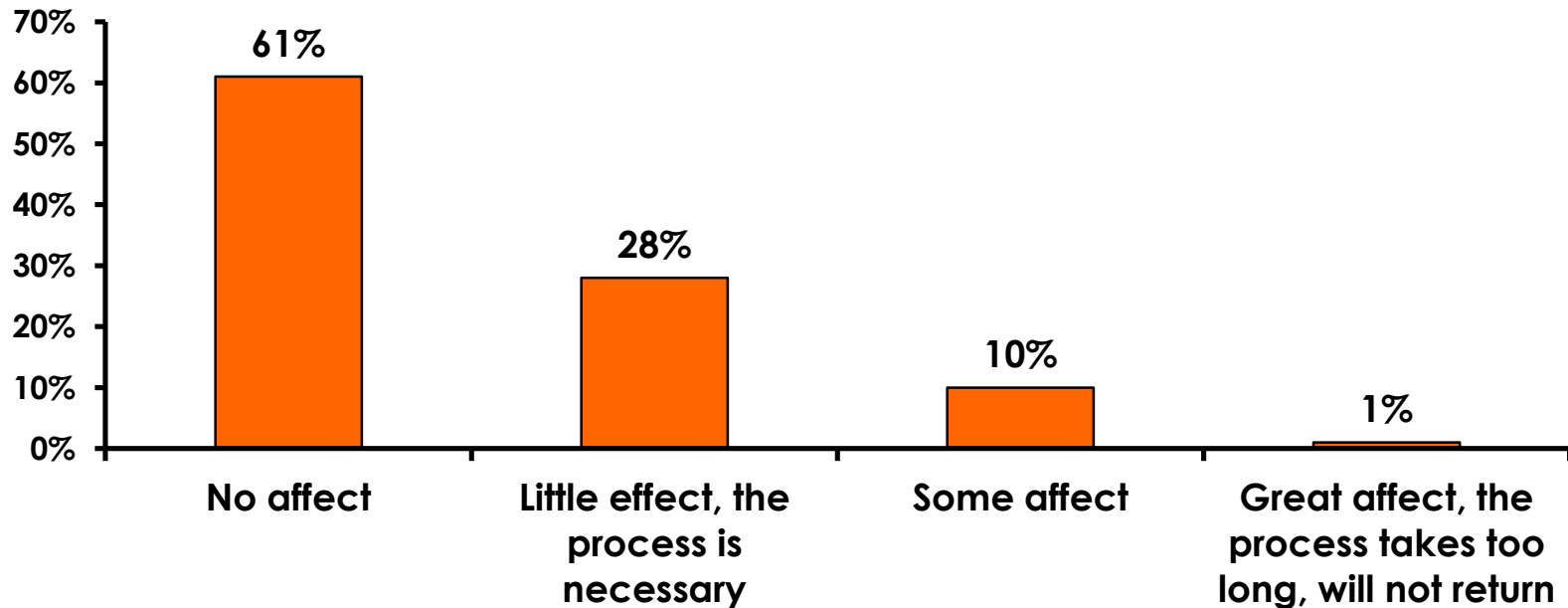
# Concerns about travel outside of Japan

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
<b>Safety</b>	81%	79%	81%	83%	80%	78%	83%	75%	76%
<b>Terrorism</b>	73%	70%	60%	59%	56%	56%	47%	48%	50%
<b>Food</b>	35%	35%	42%	41%	35%	35%	41%	41%	44%
<b>Expense</b>	46%	45%	49%	50%	45%	44%	47%	38%	41%
<b>Discrimination</b>	-	-	-	-	-	3%	10%	10%	7%
<b>Should spend @home</b>	2%	2%	2%	2%	2%	3%	2%	3%	2%
<b>Other</b>	4%	4%	4%	6%	4%	4%	4%	4%	4%
<b>DK</b>	2%	2%	3%	2%	3%	3%	3%	3%	2%
<b>No Concern</b>	2%	2%	2%	2%	3%	3%	3%	6%	6%

# 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	76%	75%	77%	75%	73%	74%	77%	75%	75%	77%	76%	75%	73%	
	Terrorism	50%	45%	54%	49%	50%	44%	52%	53%	53%	52%	44%	47%	47%	
	Food	44%	44%	46%	42%	41%	39%	46%	42%	47%	46%	45%	42%	41%	
	Expense	41%	45%	42%	38%	29%	43%	45%	41%	42%	40%	39%	37%	47%	
	Discrimination against Japanese	7%	7%	7%	7%	4%	6%	8%	9%	6%	7%	5%	8%	8%	
	No concerns	6%	5%	6%	6%	8%	7%	4%	6%	5%	6%	7%	9%	3%	
	Other	4%	3%	5%	3%	3%	3%	5%	4%	3%	4%	5%	3%	2%	
	Don't know	2%	3%	2%	2%	3%	4%	2%	1%	2%	1%	2%	1%	3%	
	Should spend at home	2%	3%	2%	1%	1%	3%	3%	3%	2%	1%	2%	1%	3%	
	Total	Count	4196	1290	1366	1076	430	247	426	489	671	757	538	553	172

# Security Screening/ Immigration Process at Guam International Airport



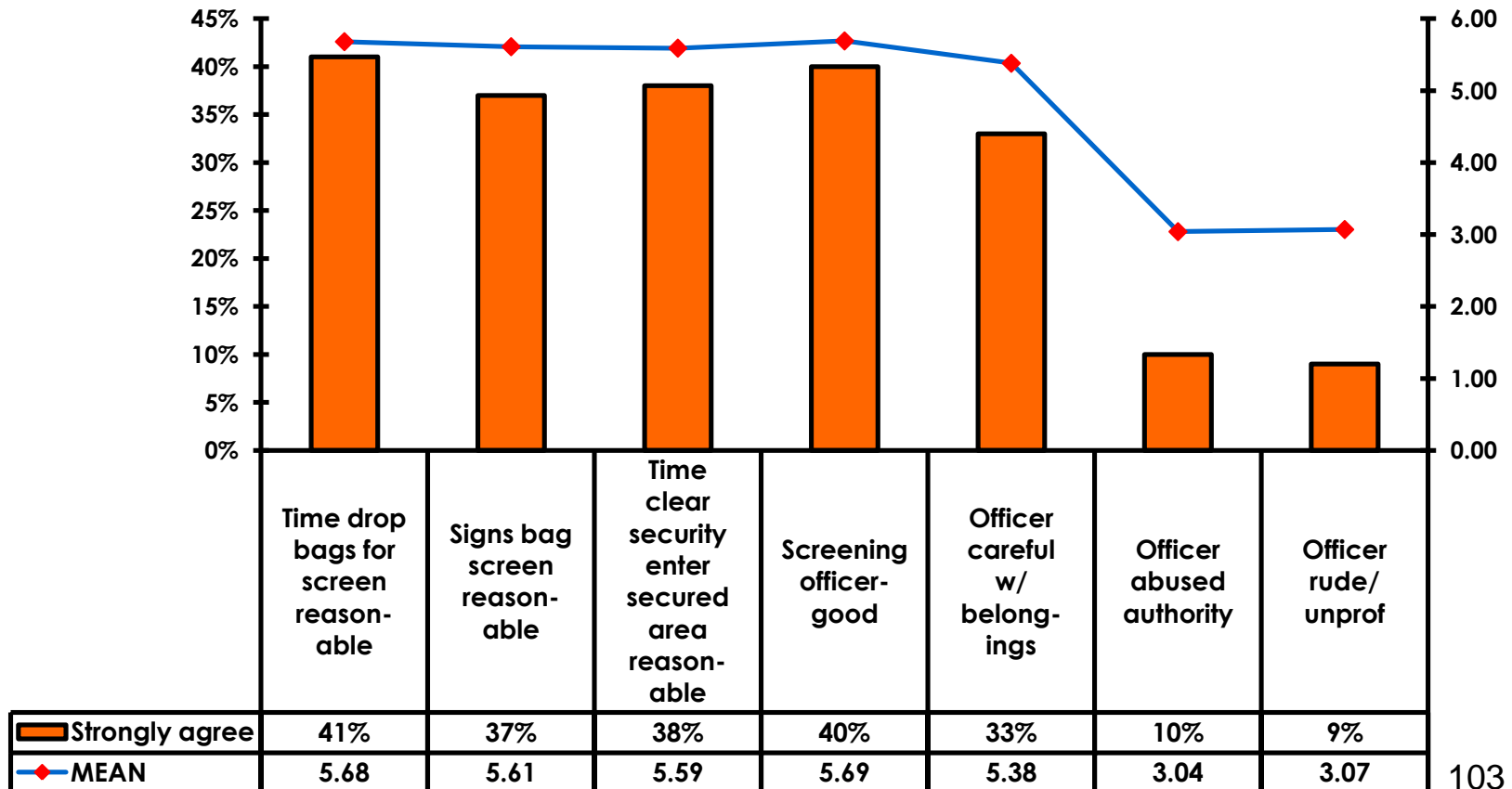
# Security Screening/ Immigration Process at Guam International Airport

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
No effect	43%	43%	50%	50%	46%	48%	50%	60%	61%
Little effect	43%	41%	38%	36%	39%	41%	37%	29%	28%
Some effect	12%	13%	11%	12%	13%	10%	11%	10%	10%
Great effect	2%	2%	2%	2%	2%	1%	2%	1%	1%

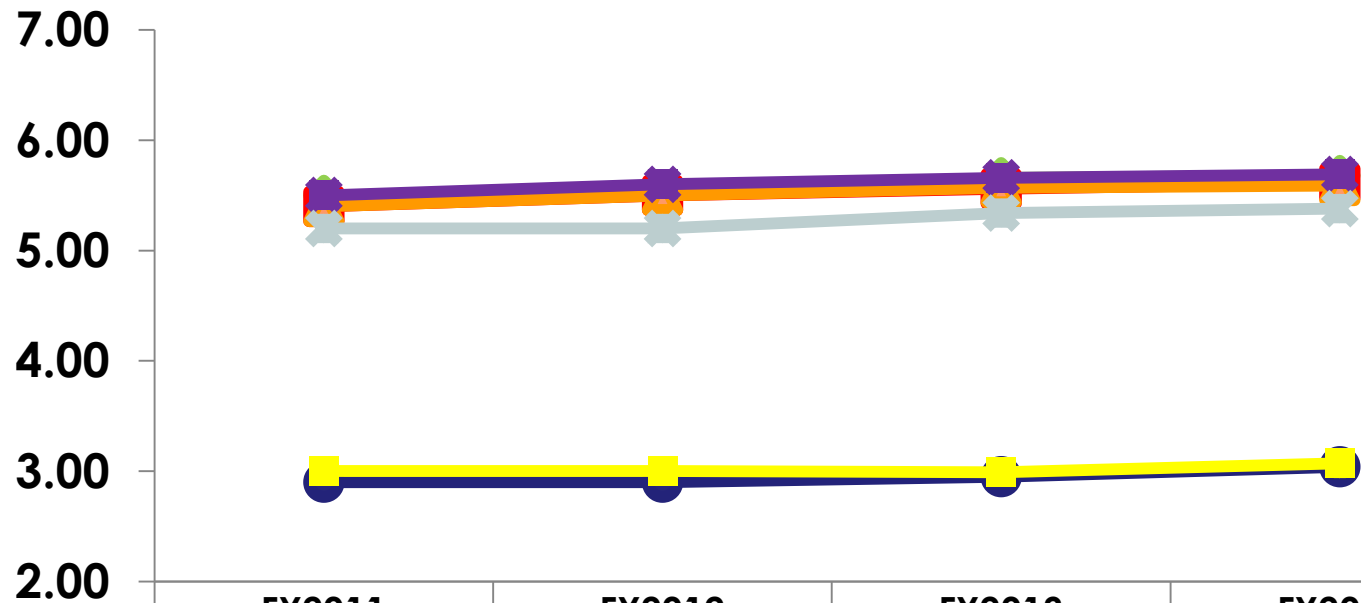
# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



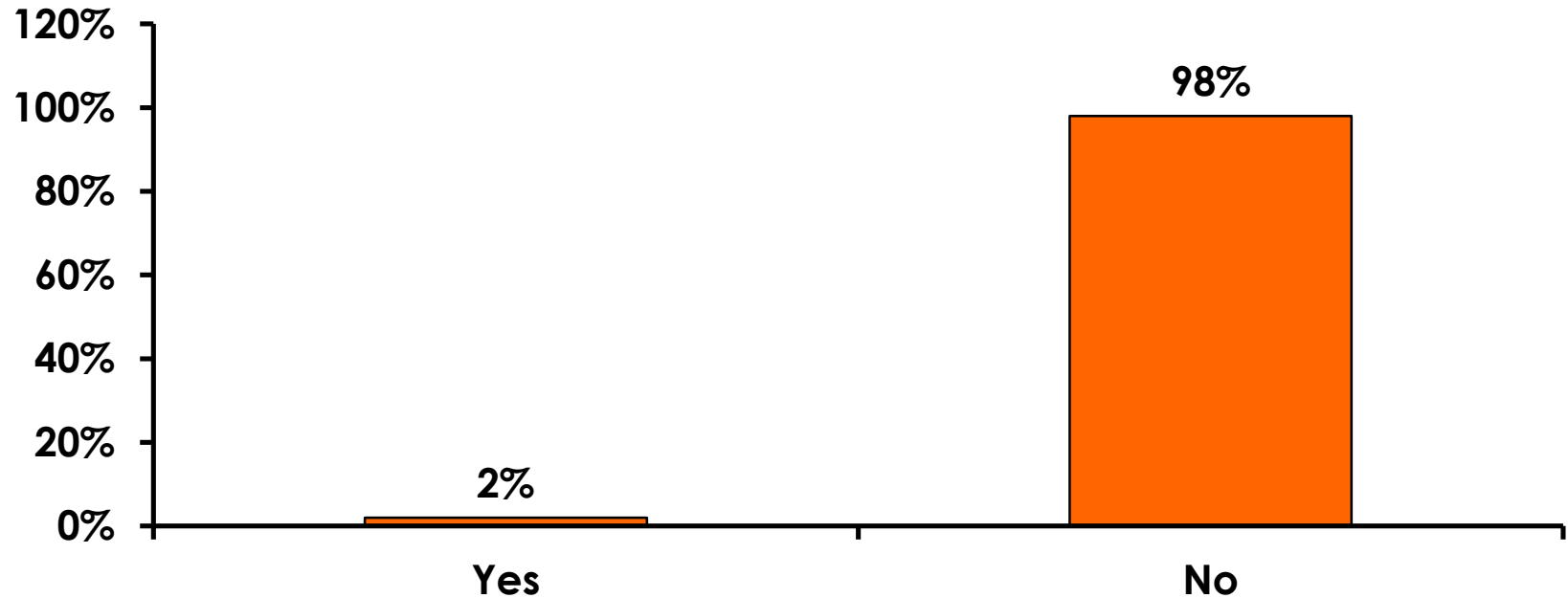
# Airport Screening



	FY2011	FY2012	FY2013	FY2014
Time- Bag screening	5.50	5.50	5.66	5.68
Sign- Bag Screen	5.40	5.50	5.56	5.61
Time- clear security	5.40	5.50	5.57	5.59
Officer- good	5.50	5.60	5.66	5.69
Officer- careful	5.20	5.20	5.34	5.38
Officer- abusive	2.90	2.90	2.95	3.04
Officer- rude	3.00	3.00	2.99	3.07



# SHOP GUAM FESTIVAL AWARENESS



# SHOP GUAM FESTIVAL – IMPACT

n=69

