



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2015 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 **4215** 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 **4215** 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.

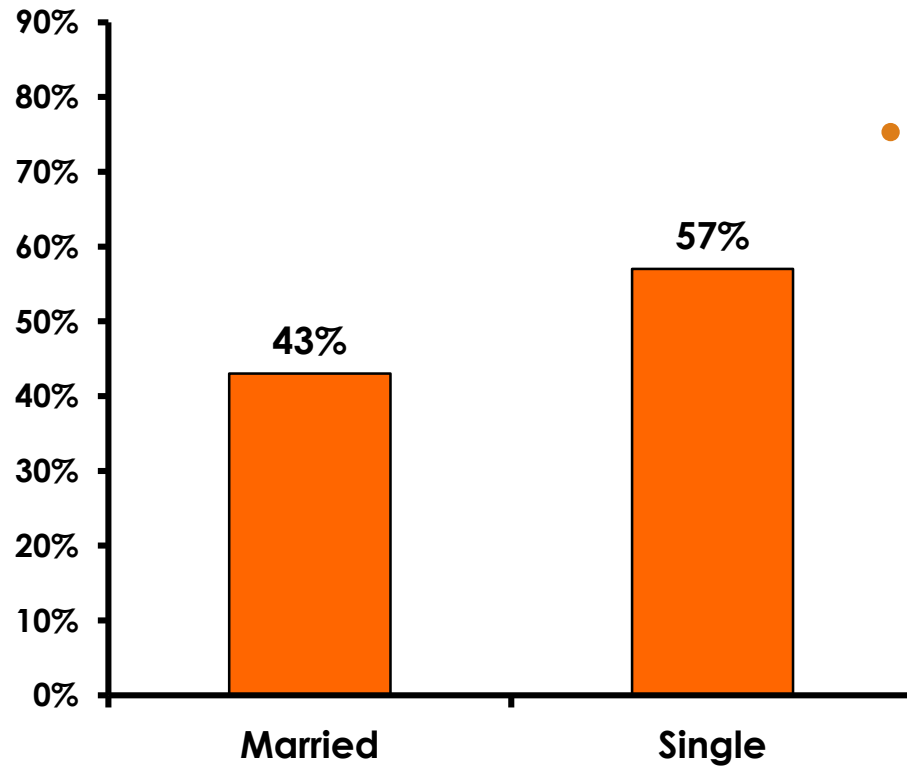
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# OBJECTIVES

- 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.

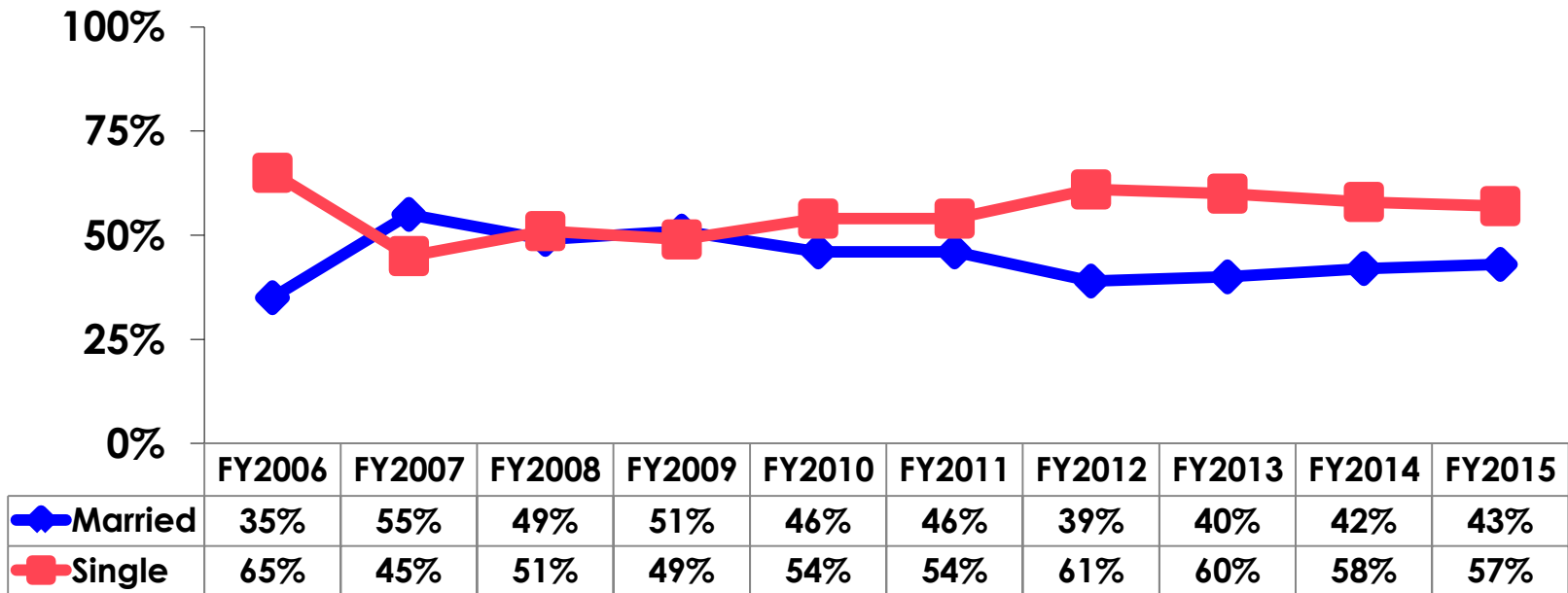
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

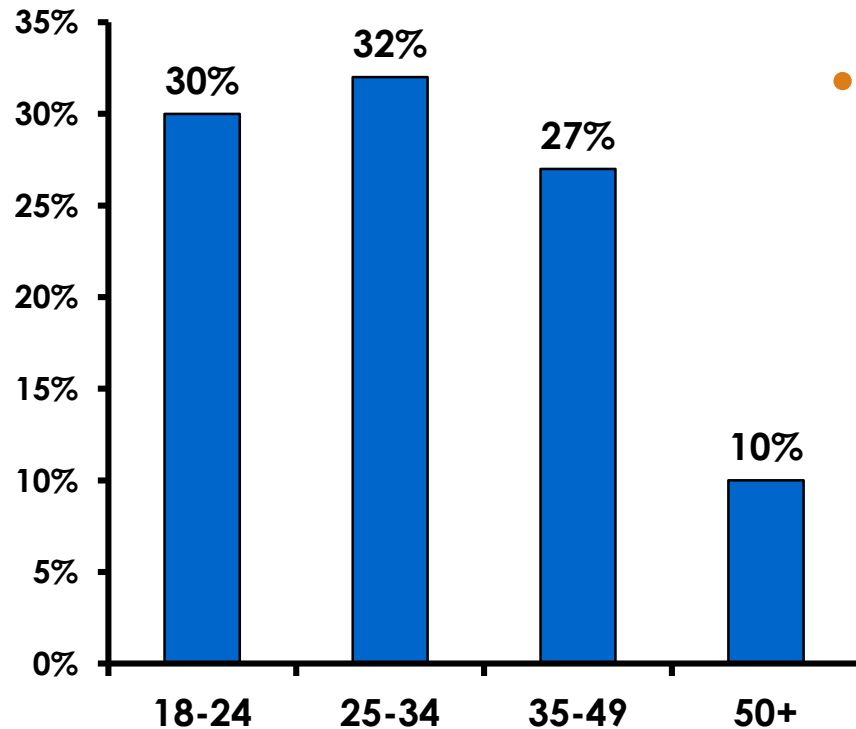


- 67% of first-time visitors are single.

# MARITAL STATUS

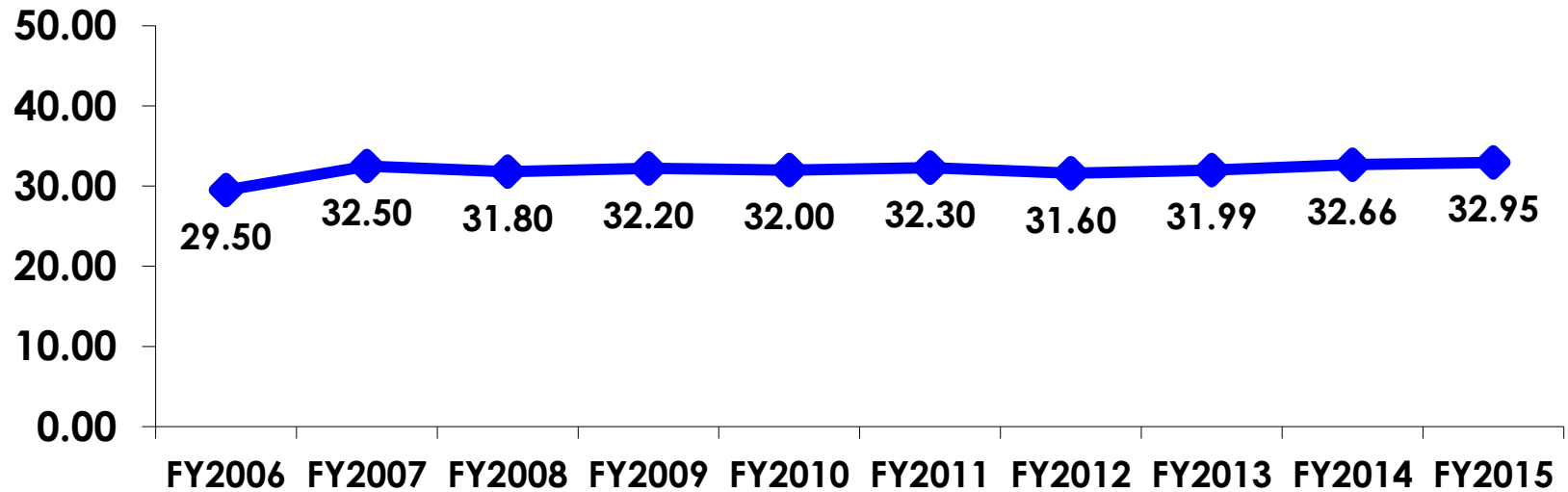


# Age - Overall



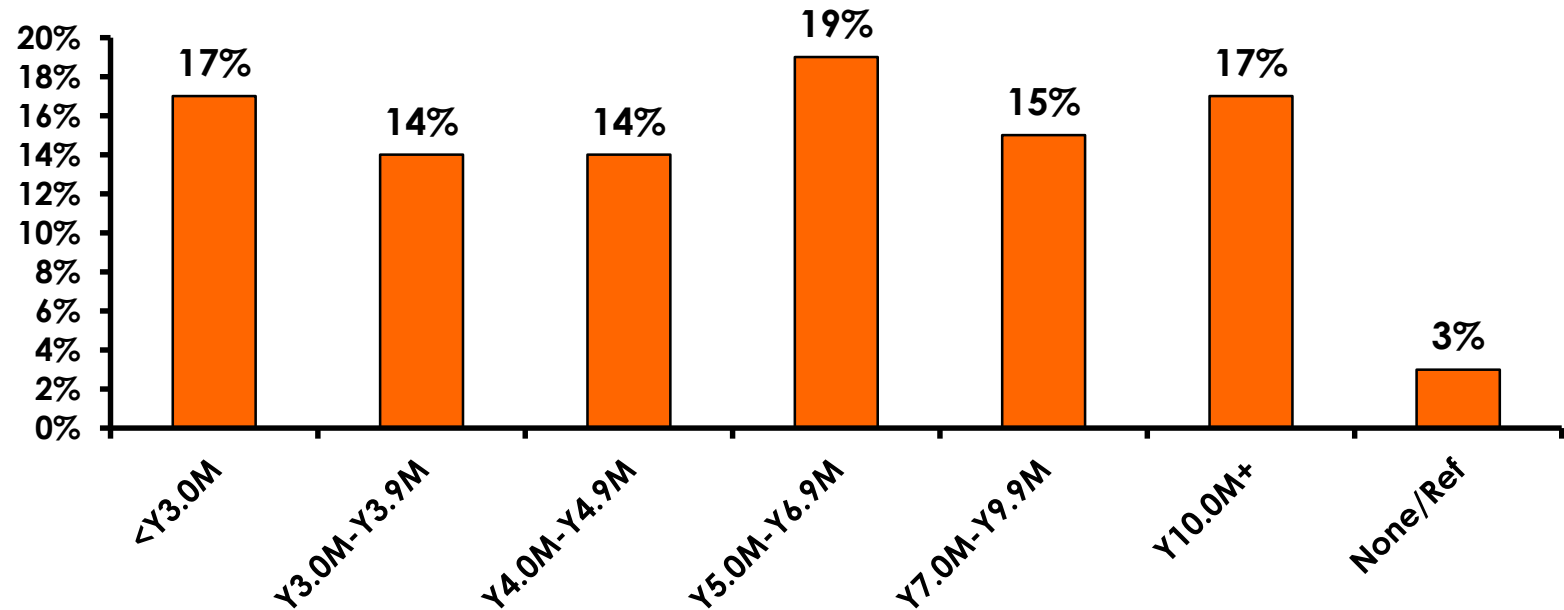
- The average age of the respondents is 32.95 years of age.

# AVERAGE - AGE





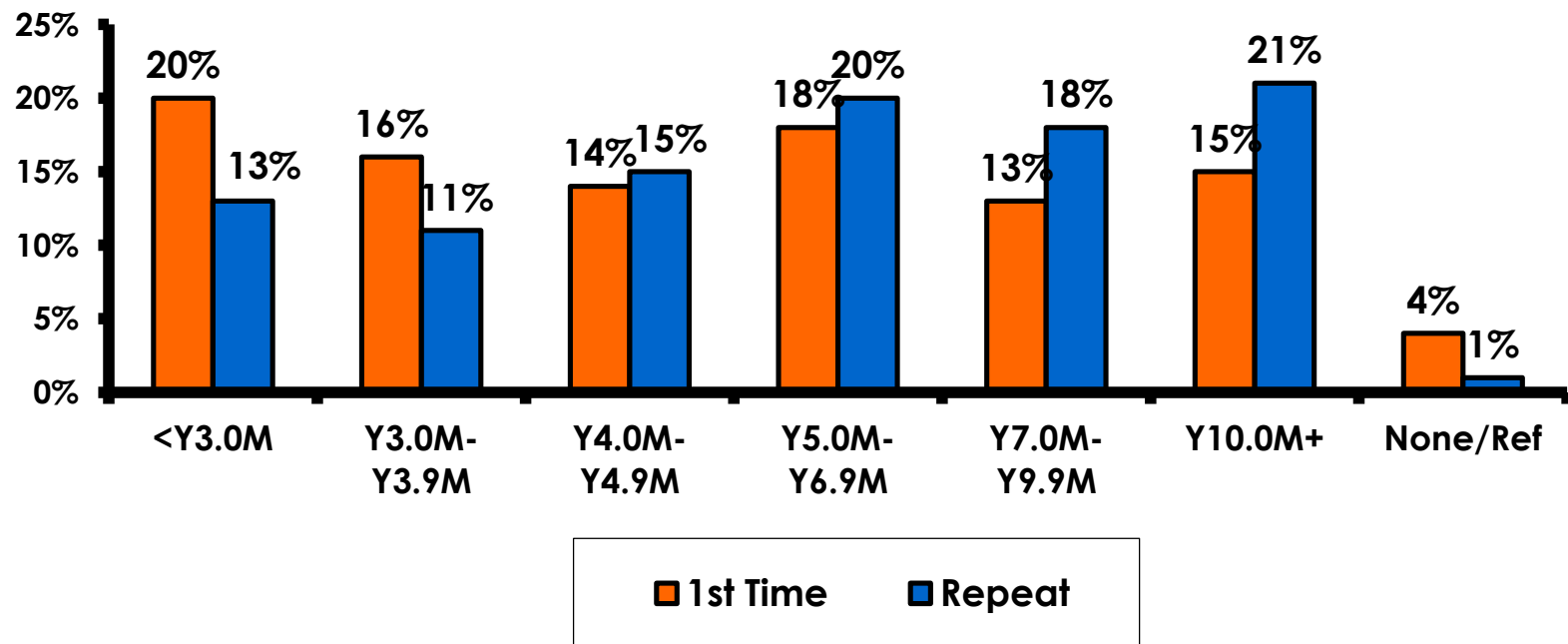
# Personal Income



# Personal Income

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015
<¥3.0m	21%	14%	15%	16%	16%	18%	19%	19%	17%	<b>17%</b>
¥3.0m- ¥3.9m	16%	14%	14%	14%	15%	14%	13%	14%	13%	<b>14%</b>
¥4.0m- ¥4.9m	12%	12%	14%	14%	14%	15%	14%	15%	17%	<b>14%</b>
¥5.0m- ¥6.9m	17%	19%	19%	18%	19%	20%	20%	20%	20%	<b>19%</b>
¥7.0m- ¥9.9m	13%	16%	18%	16%	14%	17%	15%	15%	14%	<b>15%</b>
¥10.0m +	17%	21%	18%	18%	18%	14%	16%	15%	14%	<b>17%</b>
Refused / None	4%	2%	2%	3%	3%	2%	2%	3%	4%	<b>3%</b>

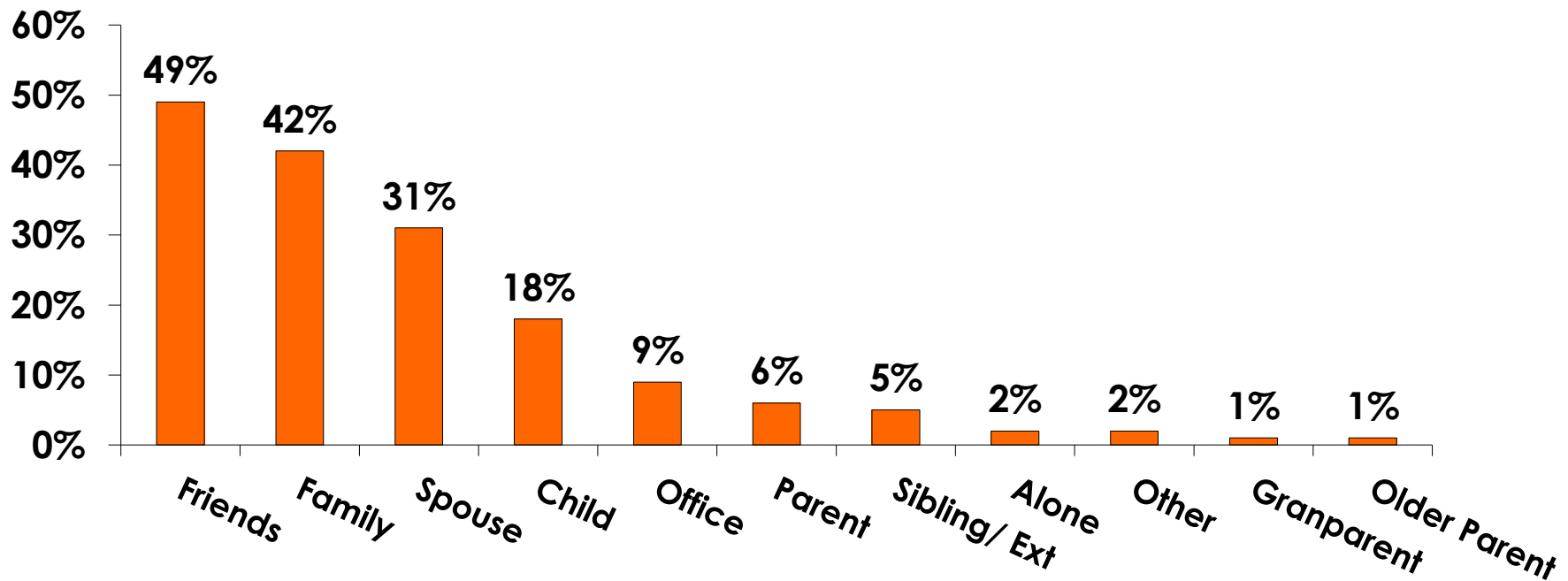
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	202	79	122	117	54	20	10
		Column N %	6%	4%	7%	12%	4%	2%	3%
Y2.0M-Y3.0M	Y2.0M-Y3.0M	Count	418	140	277	166	163	57	31
		Column N %	11%	7%	16%	17%	14%	5%	8%
Y3.0M-Y4.0M	Y3.0M-Y4.0M	Count	504	221	283	112	284	83	25
		Column N %	14%	12%	16%	12%	24%	8%	6%
Y4.0M-Y5.0M	Y4.0M-Y5.0M	Count	528	284	244	91	232	155	50
		Column N %	14%	15%	14%	9%	19%	15%	13%
Y5.0M-Y7.0M	Y5.0M-Y7.0M	Count	697	405	292	127	221	254	92
		Column N %	19%	21%	17%	13%	18%	24%	23%
Y7.0M-Y10.0M	Y7.0M-Y10.0M	Count	562	346	215	111	113	252	84
		Column N %	15%	18%	12%	12%	9%	24%	21%
Y10.0M+	Y10.0M+	Count	637	394	243	164	129	235	105
		Column N %	17%	21%	14%	17%	11%	22%	26%
No Income	No Income	Count	94	46	48	73	11	7	3
		Column N %	3%	2%	3%	8%	1%	1%	1%
Total	Count	3642	1915	1724	961	1207	1063	400	

# Travel Companions



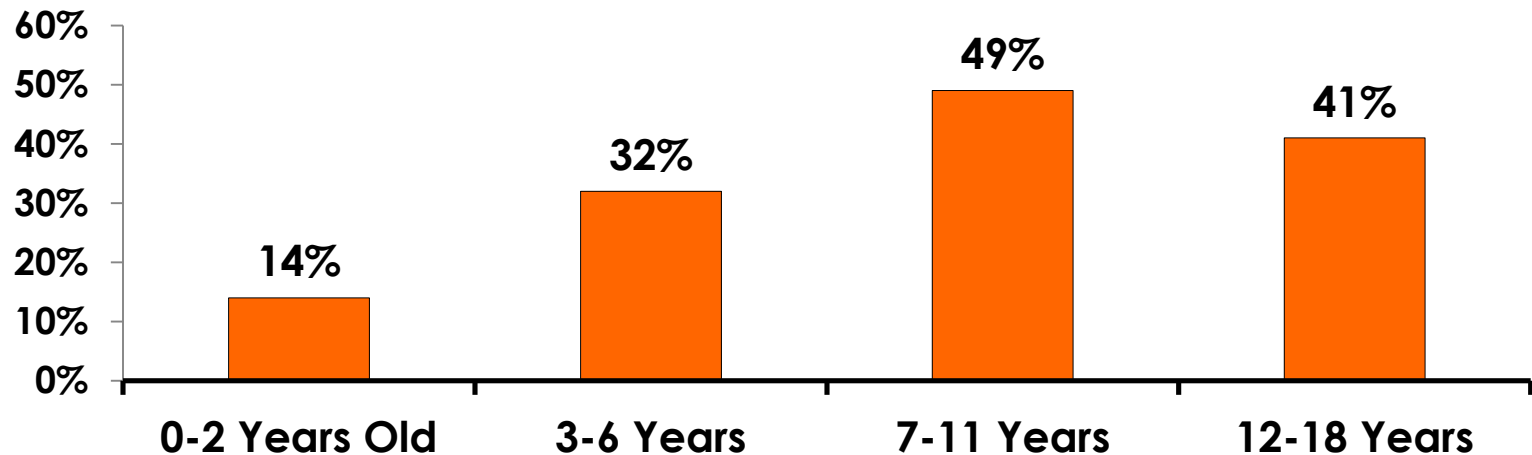
# Travel Companions

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015
Friends	53%	35%	39%	40%	46%	49%	53%	53%	47%	<b>49%</b>
Family	14%	28%	23%	27%	25%	26%	23%	39%	39%	<b>42%</b>
Spouse	18%	25%	28%	25%	20%	18%	16%	31%	30%	<b>31%</b>
Child	7%	18%	11%	14%	15%	15%	13%	15%	17%	<b>18%</b>
Parent	NA	NA	NA	NA	NA	NA	NA	6%	5%	<b>6%</b>
Office	13%	8%	7%	5%	5%	5%	5%	8%	12%	<b>9%</b>
Sibling/ Ext Fam	NA	NA	NA	NA	NA	NA	NA	5%	5%	<b>5%</b>
Alone	0%	1%	2%	2%	3%	2%	2%	1%	2%	<b>2%</b>
Other	3%	3%	2%	2%	1%	0%	1%	1%	3%	<b>2%</b>

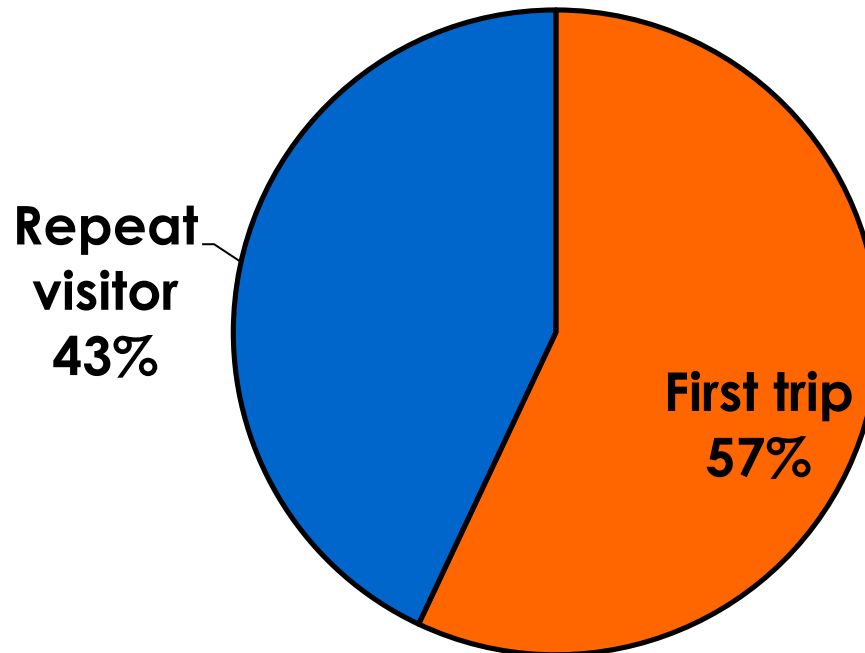
# Number of Children Travel Party

N=741 total respondents traveling with children.

(Of those N=741 respondents, there is a total of 1,192 children 18 years or younger)

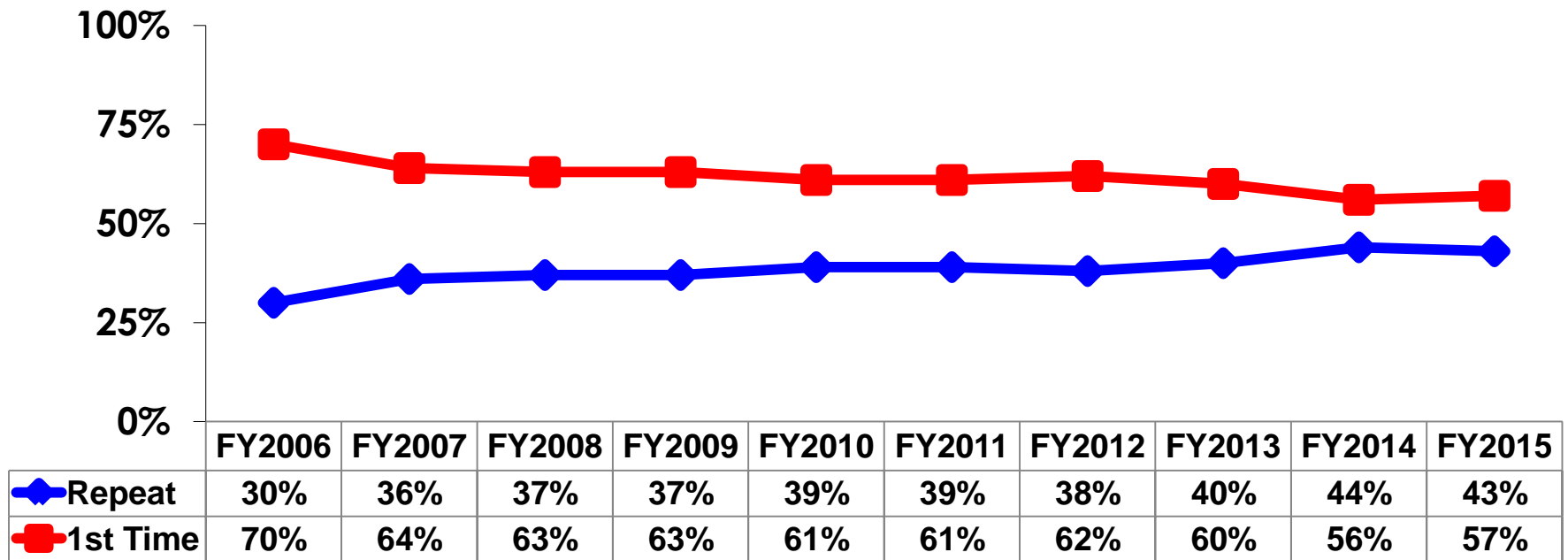


# Prior Trips to Guam





# PRIOR TRIPS TO GUAM



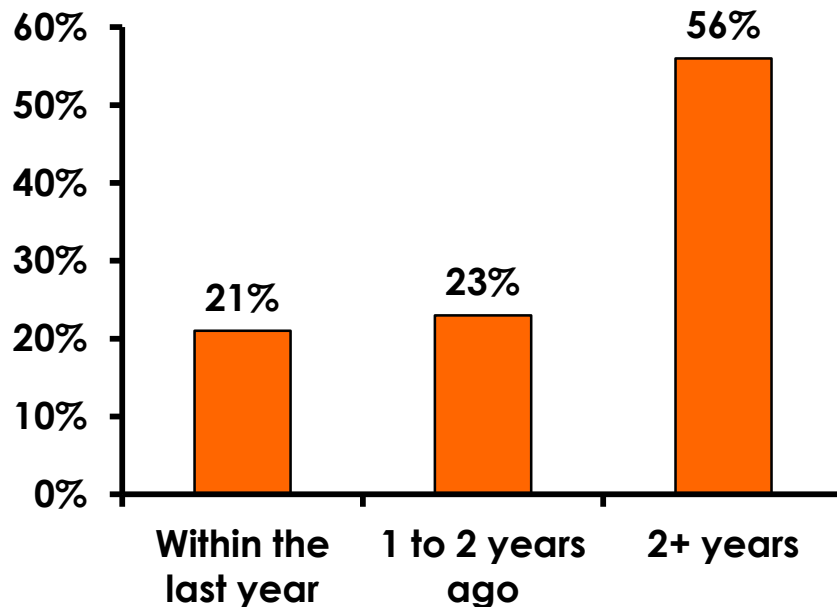
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	2101	1103	992
		Column N %	50%	46%	55%
	Female	Count	2110	1297	813
		Column N %	50%	54%	45%
	Total	Count	4211	2400	1805
	AGE	18-24	Count	1278	984
Column N %			30%	41%	16%
25-34		Count	1340	797	541
		Column N %	32%	33%	30%
35-49		Count	1148	442	704
		Column N %	27%	18%	39%
50+		Count	429	167	261
		Column N %	10%	7%	15%
Total		Count	4195	2390	1799

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

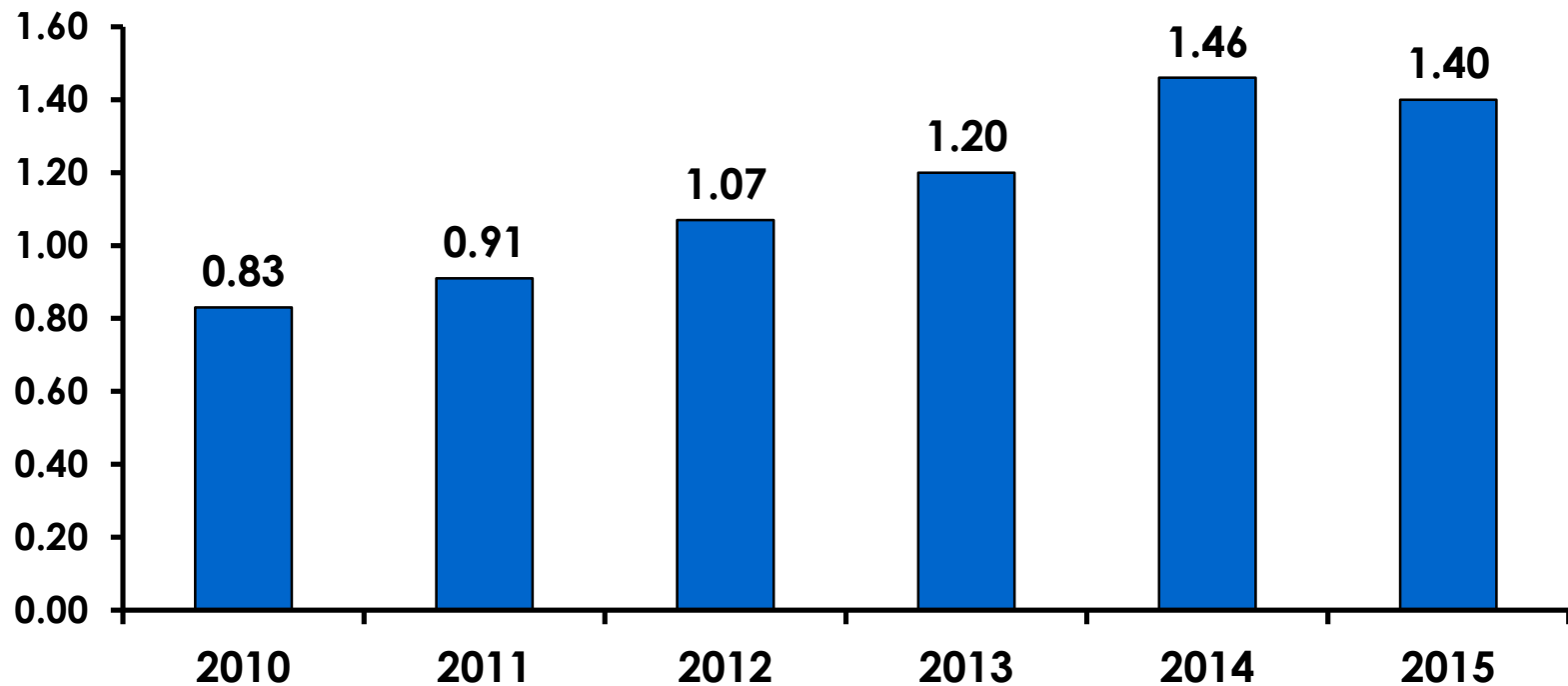
# Repeat Visitors Last Trip

n = 1745



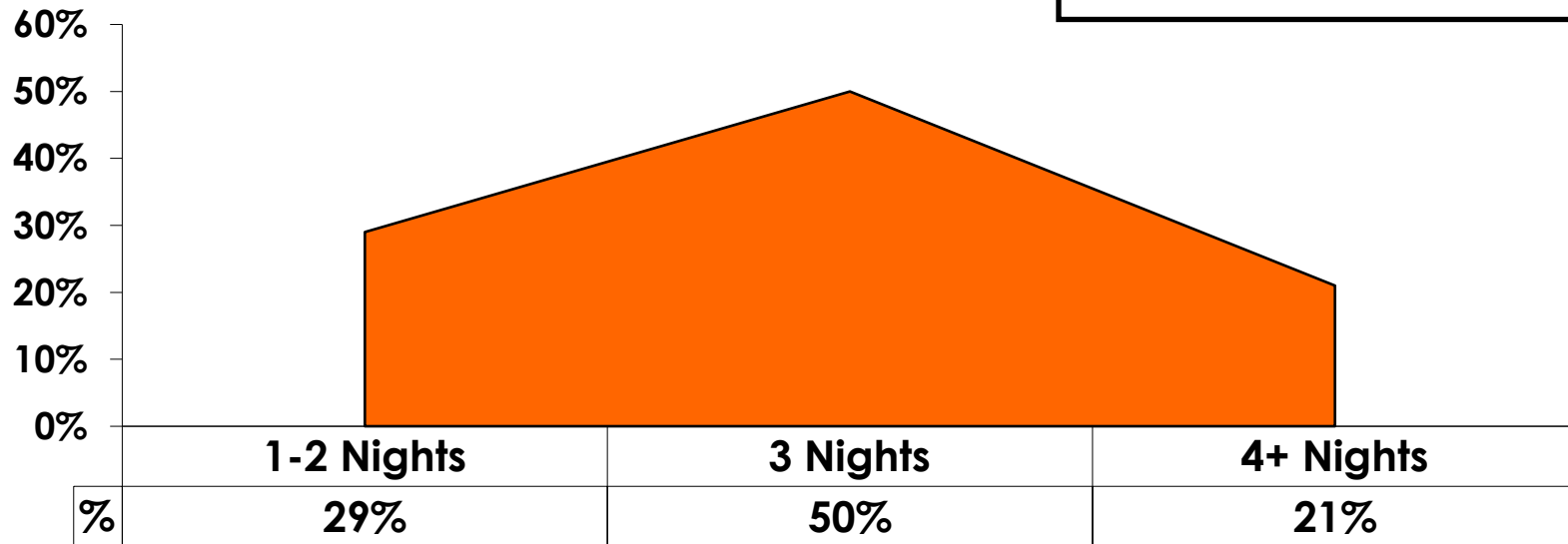
- The average repeat visitor has been to Guam 3.34 times.

# Average Number Overnight Trips (2010-2015) (2 nights or more)

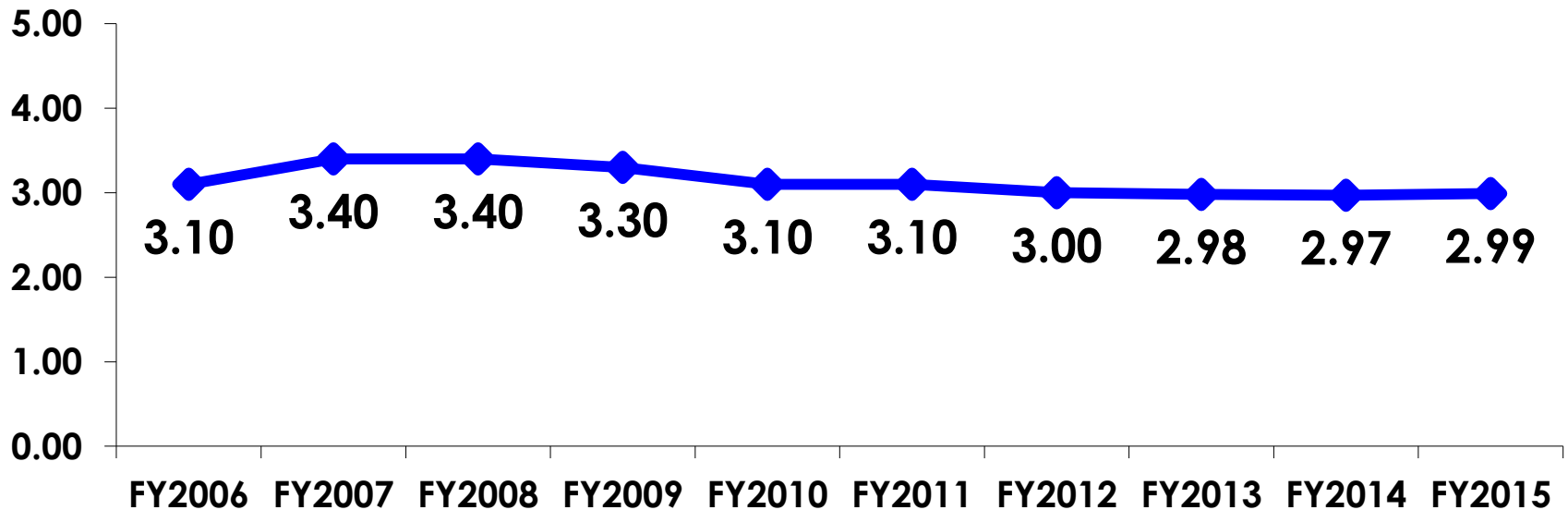


# Length of Stay

Mean = 2.99 Days  
Median = 3.0 Days



# AVG LENGTH OF STAY



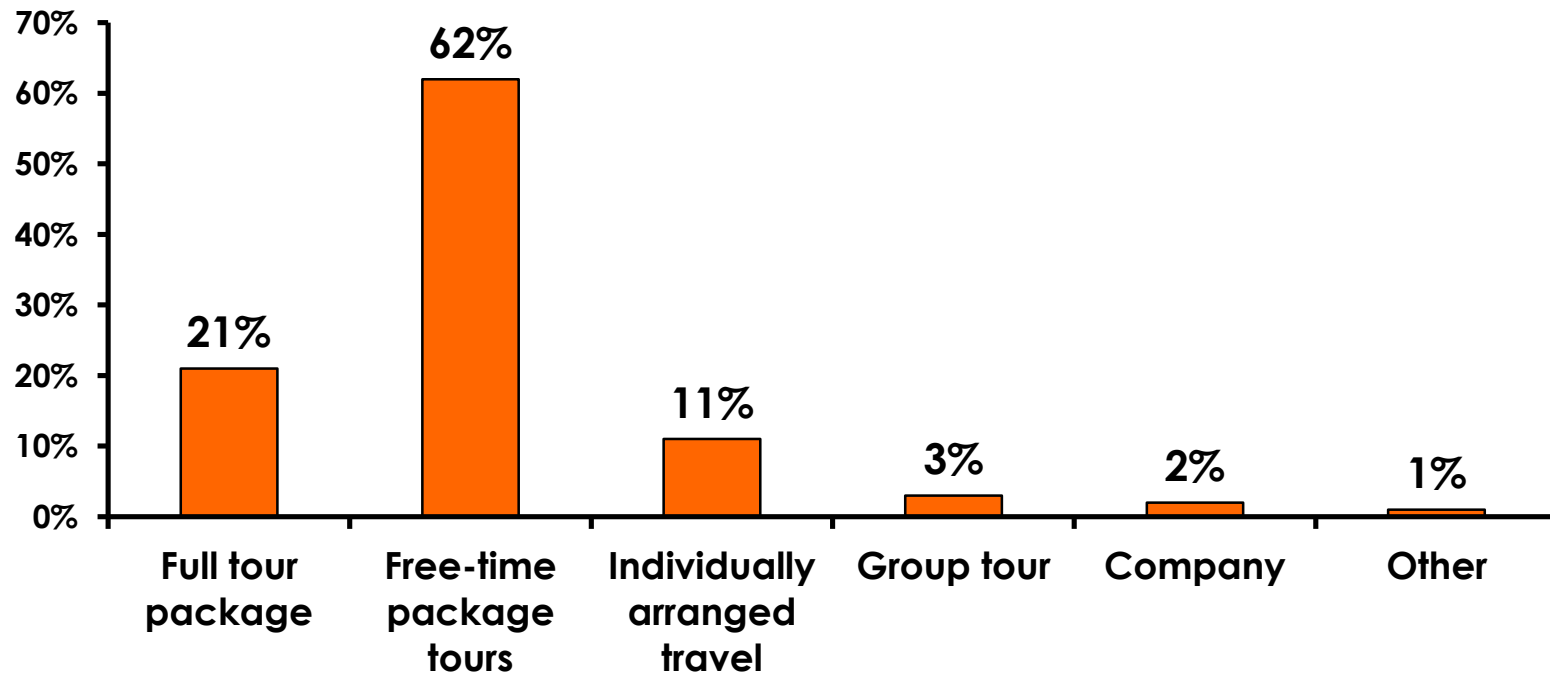
# Occupation by Income

		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	19%	39%	9%	7%	9%	13%	14%	19%	76%	
	Office worker non-mgr	17%	14%	27%	25%	18%	14%	17%	11%	1%	
	Engineer	14%	9%	13%	20%	19%	15%	13%	10%	1%	
	Salesperson	10%	3%	9%	14%	17%	14%	9%	7%	2%	
	Self-employed	7%	3%	7%	5%	8%	6%	11%	11%	1%	
	Manager	6%	1%	1%	1%	2%	7%	10%	14%		
	Homemaker	6%	2%	2%	3%	6%	9%	8%	6%	4%	
	Professional/ Specialist	3%	1%	3%	6%	4%	3%	1%	6%	1%	
	Skilled worker	3%	2%	8%	2%	4%	4%	2%	2%		
	Other	3%	6%	5%	3%	3%	3%	3%	1%		
	Teacher	3%	4%	4%	4%	2%	3%	3%	3%		
	Govt- office worker non-mgr	3%	1%	3%	4%	3%	3%	3%	2%	1%	
	Freeter	2%	11%	5%	2%	2%	1%	0%	0%	2%	
	Executive (30+ employees)	2%	1%	1%	1%	1%	1%	2%	6%	1%	
	Govt- Manager	1%		0%	1%	1%	2%	2%	2%		
	Unemployed	1%	1%	2%	1%	1%	1%	0%	0%	10%	
	Retired	0%	0%	2%	0%	0%	0%	0%	0%		
	Free-lancer	0%					1%	1%	0%		
	Govt- Executive	0%		0%	0%	0%	0%	1%	0%		
	Total	Count	4069	202	416	503	525	695	562	634	94

# SECTION 2 **TRAVEL PLANNING**



# Travel Planning - Overall



# Travel Planning

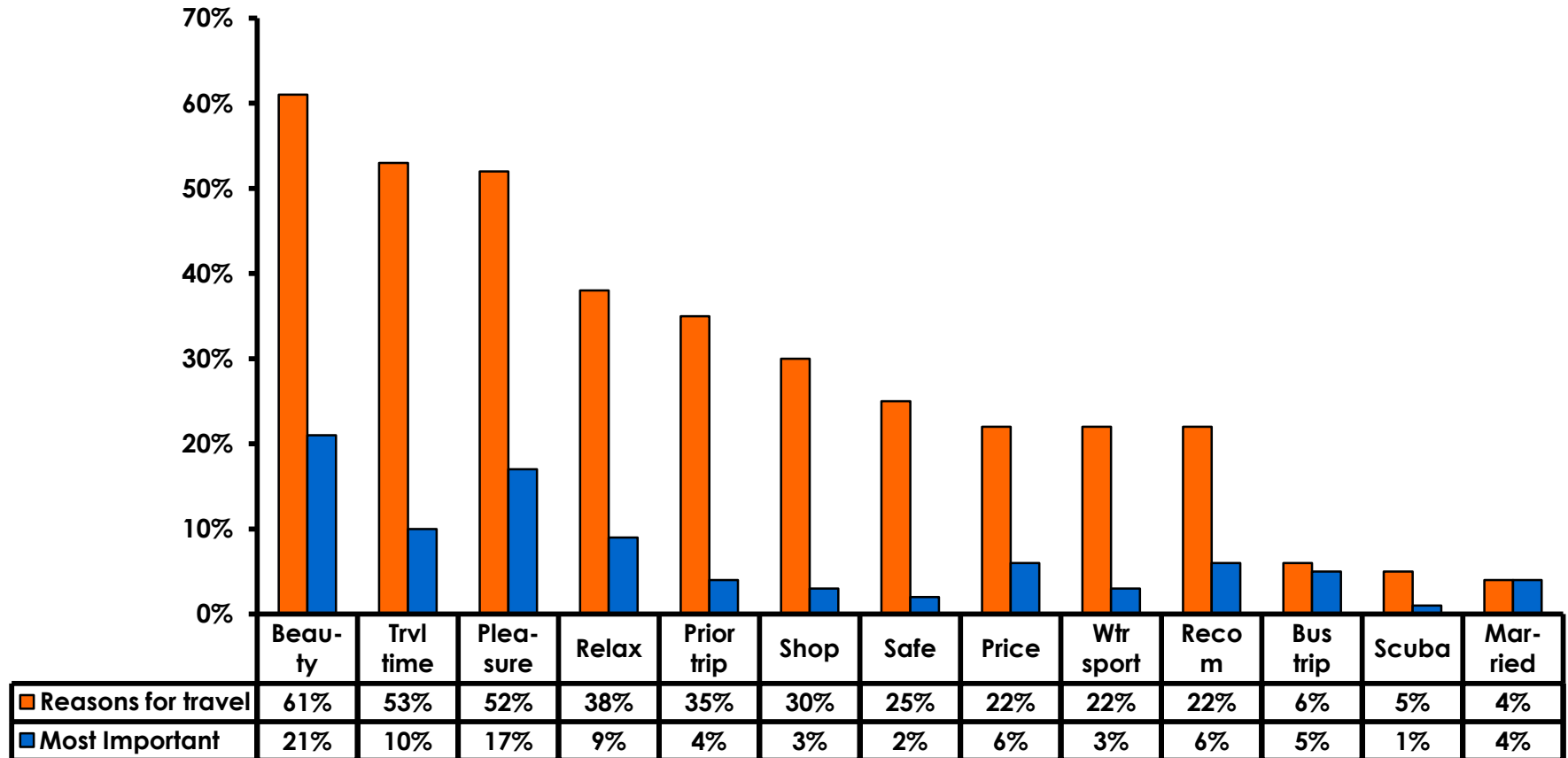
	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015
<b>Full-pkg tour</b>	19%	23%	25%	25%	20%	23%	22%	25%	22%	<b>21%</b>
<b>Free-time pkg tour</b>	69%	64%	64%	65%	66%	68%	69%	62%	60%	<b>62%</b>
<b>FIT</b>	3%	7%	7%	6%	10%	6%	5%	7%	9%	<b>11%</b>
<b>Group tour</b>	8%	6%	4%	3%	3%	3%	3%	3%	5%	<b>3%</b>
<b>Com-pany</b>	NA	NA	NA	NA	NA	1%	1%	2%	3%	<b>2%</b>
<b>Other</b>	0%	0%	0%	1%	1%	0%	0%	1%	1%	<b>1%</b>

# Accommodation by Income

Average length of stay: 2.99 days

		TOTAL	Q26								
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q9	Guam Plaza Hotel	14%	19%	19%	17%	14%	14%	11%	11%	13%	
	Outrigger Guam Resort	8%	10%	8%	9%	9%	7%	9%	10%	7%	
	Guam Reef & Olive Spa	7%	5%	6%	7%	9%	8%	7%	8%	5%	
	Grand Plaza Hotel	7%	8%	8%	8%	8%	5%	5%	4%	10%	
	PIC Club	6%	6%	6%	6%	7%	7%	7%	6%	6%	
	Fiesta Resort Guam	6%	3%	8%	7%	6%	8%	7%	4%	2%	
	Onward Beach Resort	6%	5%	3%	4%	4%	7%	9%	7%	9%	
	Hotel Nikko Guam	6%	3%	3%	5%	8%	6%	8%	8%	1%	
	Hilton Guam Resort	5%	4%	3%	4%	6%	6%	7%	8%	6%	
	Holiday Resort Guam	5%	9%	6%	6%	4%	5%	6%	3%	4%	
	Westin Resort Guam	4%	4%	4%	5%	3%	4%	4%	6%		
	Pacific Bay Hotel	4%	8%	5%	4%	3%	2%	4%	2%	5%	
	Royal Orchid Guam	3%	3%	3%	3%	4%	3%	3%	3%	3%	
	Leo Palace Resort	3%	2%	2%	2%	1%	3%	3%	4%	2%	
	Sheraton Laguna Guam	2%	2%	2%	2%	2%	3%	2%	3%	1%	
	Hyatt Regency Guam	2%	1%	1%	1%	3%	2%	3%	3%	1%	
	Oceanview Hotel	2%	3%	1%	2%	2%	2%	1%	2%	3%	
	Pacific Star Resort & Spa	2%	1%	2%	3%	2%	2%	1%	2%	1%	
	Other	2%	2%	2%	1%	2%	1%	1%	1%	9%	
	Bayview Hotel	2%	4%	4%	1%	1%	2%	1%	1%	1%	
	Aqua Suites	1%	1%	1%	2%	0%	1%	1%	1%	2%	
	Lotte Hotel Guam	1%		1%	1%	2%	1%		1%	1%	
	Condo	1%	1%	0%	1%	0%	0%	1%	0%		
	Verona Resort & Spa	1%	1%	1%		0%	1%	1%	0%	3%	
	Hotel Santa Fe	0%	1%	0%		1%	1%		1%	1%	
	Tumon Bay Capital Hotel	0%		1%		0%	1%		0%	2%	
	Dusit Thani Guam	0%						0%	0%		
	Home stay/ friend/ relative	0%				0%	0%				
	Days Inn (Tamuning)	0%						0%	0%		
	Days Inn (Maite)	0%				0%					
	Total	Count	4196	200	413	501	528	695	560	636	94

# Travel Motivation - Top Responses



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# Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure,
- 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	FY2015
<b>Natural Beauty</b>	16%	15%	16%	16%	17%	18%	17%	18%	18%	<b>21%</b>
<b>Pleasure</b>	16%	14%	12%	12%	14%	18%	18%	16%	16%	<b>17%</b>
<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>Not top 3</b>
<b>Short Travel Time</b>	Not Top 3	13%	10%	Not Top 3	Not Top 3	9%	Not top 3	10%	10%	<b>10%</b>
<b>Price</b>	Not Top 3	Not Top 3	10%	14%	11%	Not top 3	10%	Not top 3	Not top 3	<b>Not top 3</b>

# Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty	61%	69%	60%	58%	52%	58%	64%	
	Short travel time	53%	45%	54%	59%	57%	52%	53%	
	Pleasure	52%	59%	51%	50%	43%	48%	57%	
	Relax	38%	34%	42%	37%	39%	36%	40%	
	Previous trip	35%	17%	32%	51%	51%	38%	31%	
	Shopping	30%	37%	30%	24%	29%	24%	36%	
	Safe	25%	21%	21%	31%	32%	27%	23%	
	Price	22%	28%	22%	19%	16%	21%	24%	
	Water sports	22%	26%	23%	20%	16%	20%	24%	
	Recomm- friend/family/trvl agnt	22%	35%	21%	13%	15%	19%	26%	
	Company/ Business Trip	6%	5%	7%	8%	5%	6%	7%	
	Scuba	5%	6%	5%	4%	4%	5%	5%	
	Married/ Attn wedding	4%	1%	6%	4%	9%	5%	3%	
	Other	4%	4%	2%	5%	6%	4%	4%	
	Honeymoon	4%	1%	7%	3%	0%	6%	1%	
	Golf	3%	1%	1%	4%	13%	5%	1%	
	Visit friends/ Relatives	2%	3%	2%	1%	4%	2%	2%	
	Organized sports	2%	2%	2%	2%	2%	2%	2%	
	Company Sponsored	1%	0%	1%	2%	1%	1%	1%	
	Career Cert/ Testing	0%	0%	0%	0%	0%	0%	0%	
	Convention/ Trade/ Conference	0%		0%		0%	0%	0%	
	Total	Count	4203	1275	1336	1145	428	2092	2107

# 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	61%	57%	62%	58%	58%	60%	63%	67%	66%	
	Short travel time	53%	42%	47%	48%	53%	56%	59%	61%	41%	
	Pleasure	52%	51%	53%	50%	50%	51%	54%	57%	60%	
	Relax	38%	33%	39%	41%	38%	36%	41%	45%	27%	
	Previous trip	35%	22%	29%	30%	36%	39%	44%	45%	14%	
	Shopping	30%	30%	36%	30%	29%	27%	30%	32%	27%	
	Safe	25%	18%	24%	19%	26%	25%	33%	31%	16%	
	Price	22%	22%	19%	23%	24%	22%	25%	21%	29%	
	Water sports	22%	22%	23%	23%	23%	21%	23%	23%	23%	
	Recomm- friend/family/trvl agnt	22%	35%	25%	23%	20%	20%	18%	18%	31%	
	Company/ Business Trip	6%	8%	11%	12%	7%	5%	3%	3%	2%	
	Scuba	5%	6%	4%	5%	5%	5%	6%	4%	9%	
	Married/ Attn wedding	4%	4%	6%	6%	4%	5%	4%	3%	1%	
	Other	4%	3%	3%	3%	3%	4%	4%	6%	5%	
	Honeymoon	4%	3%	4%	5%	8%	5%	2%	1%		
	Golf	3%	4%	1%	1%	3%	4%	3%	6%	2%	
	Visit friends/ Relatives	2%	3%	1%	2%	2%	2%	3%	2%	3%	
	Organized sports	2%	2%	1%	3%	1%	2%	3%	2%		
	Company Sponsored	1%	1%	1%	1%	1%	1%	2%	1%	1%	
	Career Cert/ Testing	0%	1%	0%	0%		0%	0%	0%		
	Convention/ Trade/ Conference	0%				0%		0%			
	Total	Count	4203	200	417	503	528	697	560	636	93



# SECTION 3 **EXPENDITURES**

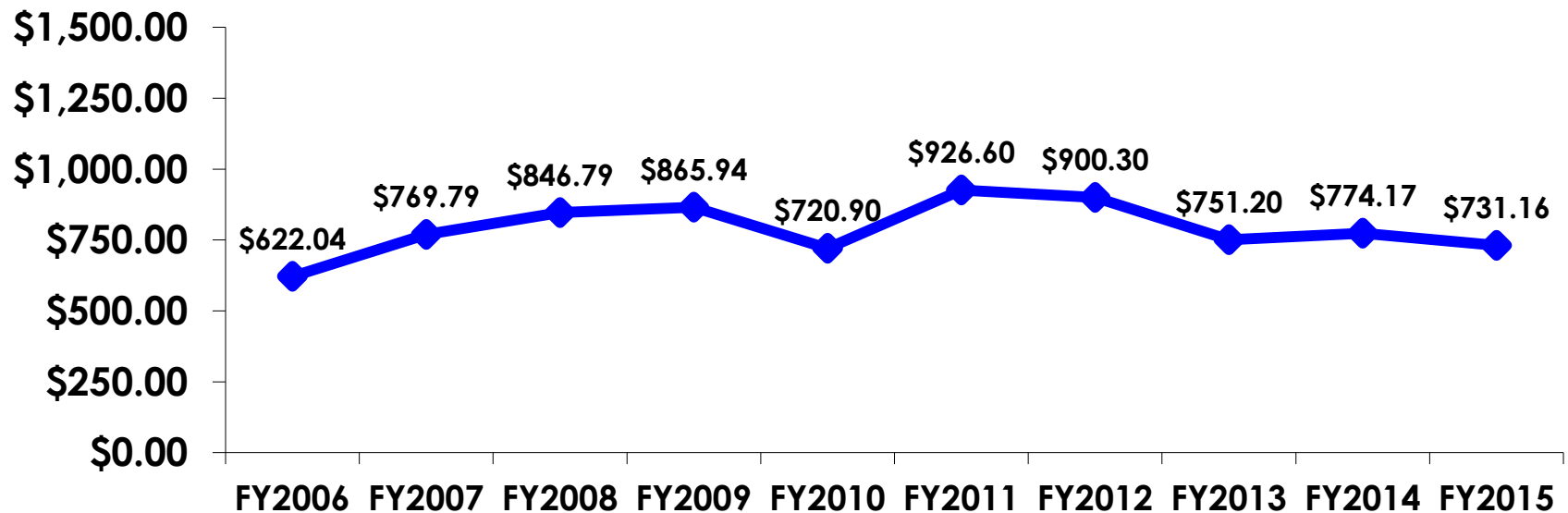
# Prepaid Expenditures

¥Varies/US\$1

- \$1,475.15 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$24,256 = maximum (highest amount recorded for the entire sample)
- \$731.16 = 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	\$1,473.63
Air & Accommodation w/ daily meal package	\$2,721.85
Air only	\$1,435.94
Accommodation only	\$715.78
Accommodation w/ daily meal only	\$1,345.94
Food & Beverages in Hotel	\$334.66
Ground transportation – Japan	\$59.49
Ground transportation – Guam	\$71.02
Optional tours/ activities	\$249.04
Other expenses	\$324.14
<b>Total Prepaid</b>	<b>\$1,475.15</b>

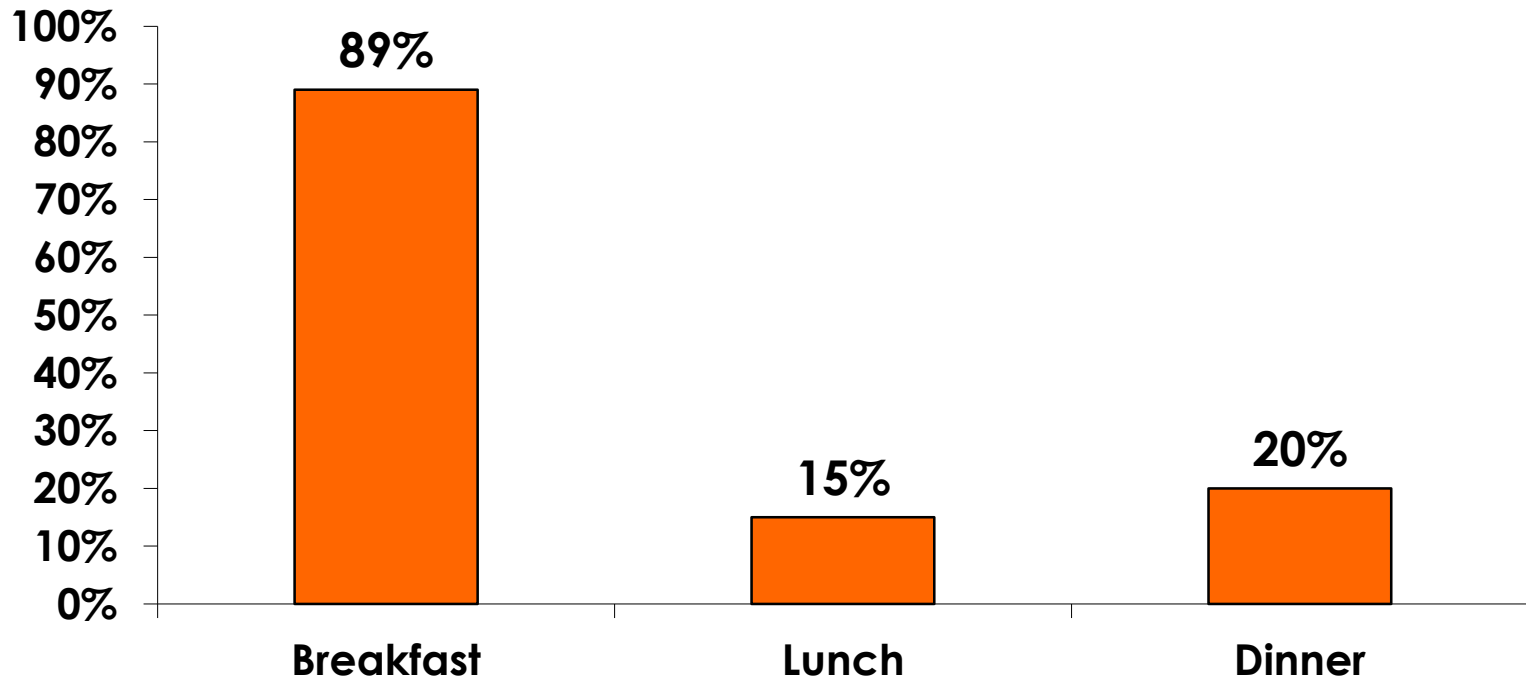
# Breakdown of Prepaid Expenditures

	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015
Air & Accommodation package only	\$1,550	\$1,589	\$1,696	\$1402.50	\$1,767.00	\$1,681.20	\$1,369.90	\$1,442.20	<b>\$1,473.63</b>
Air & Accommodation w/ daily meal package	\$2,536	\$3,404	\$3,006	\$3199.80	\$3,555.90	\$3,546.00	\$2,276.72	\$2,779.61	<b>\$2,721.85</b>
Air only	\$1,129	\$924	\$937	\$952.90	\$1,359.60	\$1,836.40	\$1,454.43	\$1,330.39	<b>\$1,435.94</b>
Accommodation only	\$532	\$520	\$748	\$524.30	\$748.30	\$1,136.90	\$843.15	\$684.83	<b>\$715.78</b>
Accommodation w/ daily meal only	\$934	\$887	\$595	\$944.70	\$1,040.70	\$838.10	\$1,596.78	\$1,207.25	<b>\$1,345.94</b>
Food & Beverages in Hotel	\$103	\$394	\$232	\$168.50	\$209.90	\$194.20	\$116.71	\$141.44	<b>\$334.66</b>
Ground transportation – Japan	\$110	\$121	\$100	\$95.30	\$129.70	\$156.70	\$68.87	\$88.70	<b>\$59.49</b>
Ground transportation – Guam	\$62	\$88	\$93	\$93.90	\$58.60	\$100.80	\$75.43	\$116.66	<b>\$71.02</b>
Optional tours/ activities	\$274	\$255	\$316	\$289.50	\$298.60	\$302.40	\$273.09	\$303.01	<b>\$249.04</b>
Other expenses	\$417	\$726	\$834	\$530.00	\$512.40	\$420.20	\$609.30	\$537.87	<b>\$324.14</b>
<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>	<b>\$1,475.15</b>

# PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=379

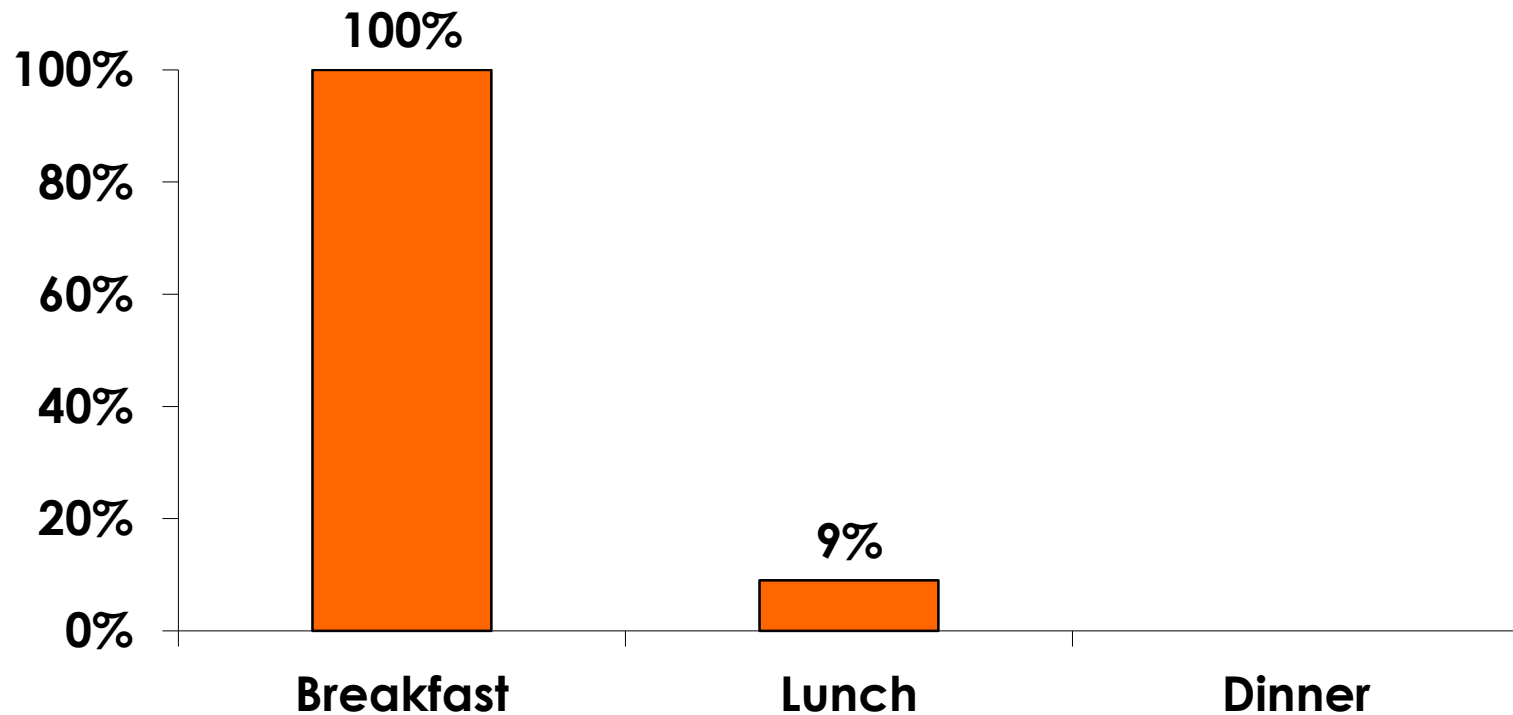


Mean=\$2,721.85 per travel party

# PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

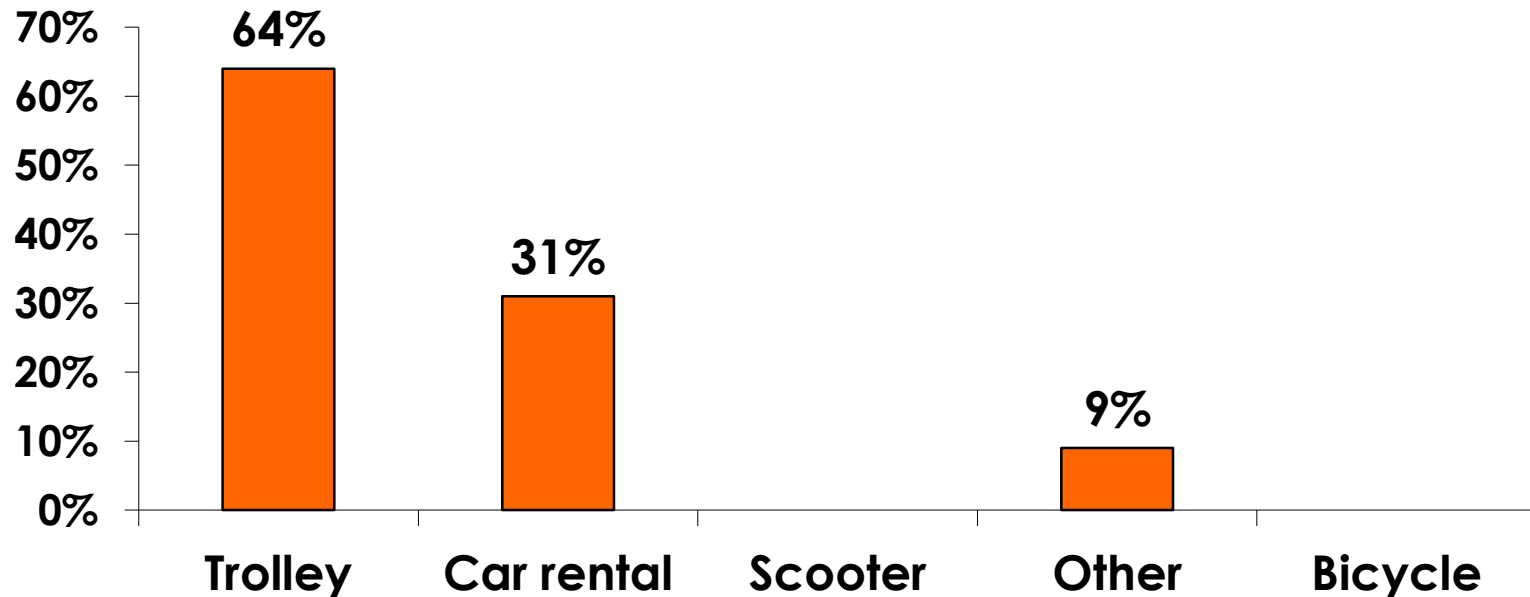
n=11



Mean=\$1,345.94 per travel party

# PREPAID GROUND TRANSPORTATION

n=45



Mean=\$71.02 per travel party

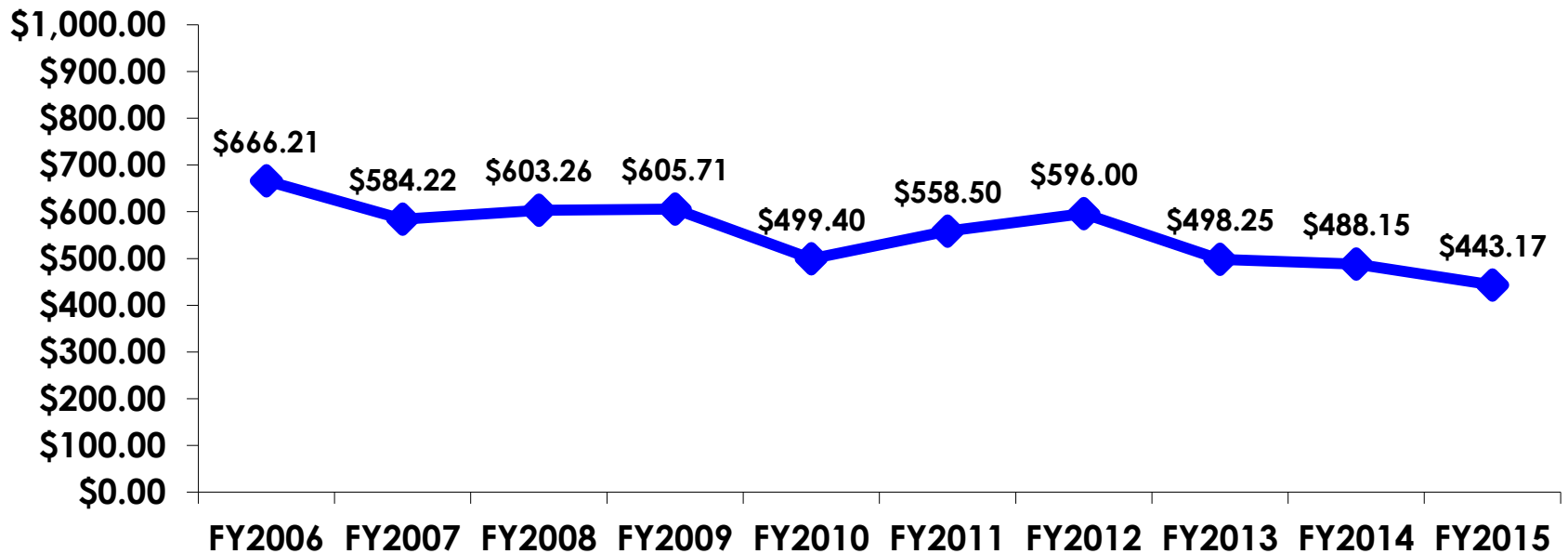


# On-Island Expenditures

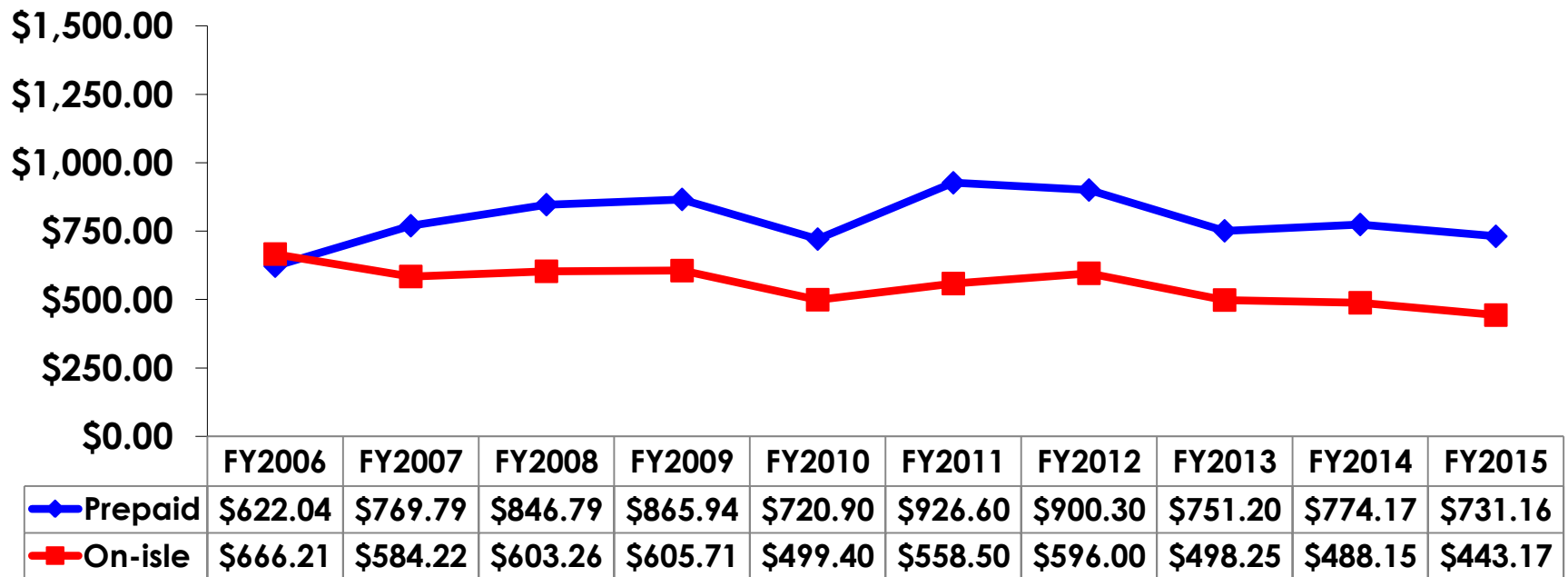
- \$745.03 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,000 = Maximum (highest amount recorded for the entire sample)
- \$443.17 = overall mean average per person on-island expenditure

# 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	\$443.17	\$436.44	\$450.35	\$385.41	\$448.36	\$426.16	\$520.52	\$400.06	\$477.94	\$457.55	\$583.11
	Median	\$335	\$333	\$350	\$300	\$362	\$300	\$400	\$330	\$400	\$330	\$472
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$6,330	\$5,000	\$6,330	\$2,500	\$3,000	\$5,000	\$4,300	\$3,000	\$4,000	\$5,000	\$6,330

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$39.38	\$51.97	\$26.91	\$15.76	\$25.55	\$65.49	\$84.19
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$34.13	\$39.94	\$28.40	\$27.70	\$29.43	\$45.05	\$39.62
	Median	\$0	\$7	\$0	\$0	\$0	\$5	\$0
F&B RESTRNT	Mean	\$88.17	\$112.47	\$63.88	\$51.45	\$77.69	\$128.75	\$123.90
	Median	\$20	\$40	\$0	\$0	\$20	\$50	\$35
OPT TOUR	Mean	\$71.40	\$83.57	\$59.41	\$47.91	\$61.86	\$95.96	\$108.41
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$151.70	\$164.34	\$139.21	\$89.13	\$153.83	\$203.93	\$194.31
	Median	\$10	\$0	\$20	\$0	\$20	\$20	\$30
GIFT- OTHER	Mean	\$106.32	\$112.00	\$100.77	\$71.02	\$102.86	\$129.33	\$162.86
	Median	\$50	\$45	\$50	\$30	\$50	\$50	\$80
TRANS	Mean	\$16.62	\$21.61	\$11.68	\$8.15	\$12.97	\$26.20	\$28.14
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$237.69	\$274.14	\$201.74	\$146.03	\$210.35	\$318.33	\$370.90
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$5
TOTAL	Mean	\$745.03	\$860.70	\$630.62	\$457.21	\$673.55	\$1,011.67	\$1,115.38
	Median	\$500	\$600	\$430	\$350	\$500	\$700	\$800

# On-Island Expenditures

## First Timers & Repeaters

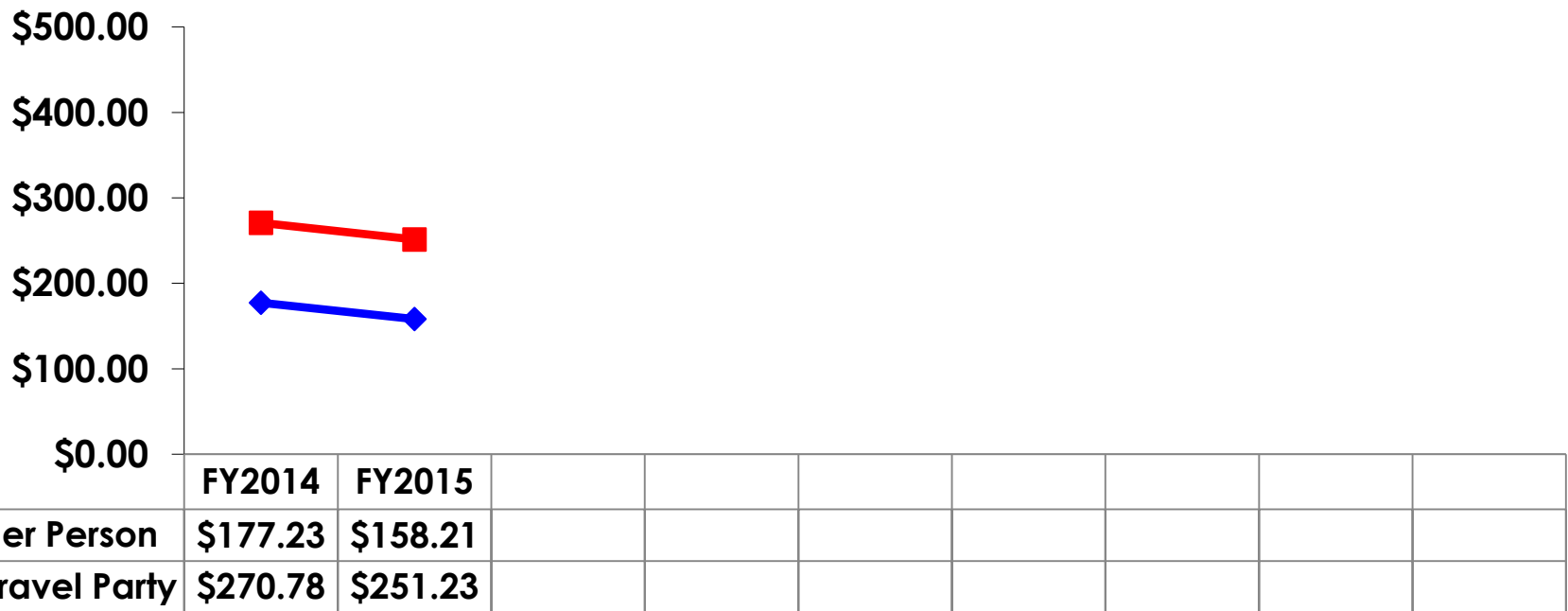
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$39.38	\$30.67	\$51.08
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$34.13	\$32.67	\$36.14
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$88.17	\$76.19	\$104.28
	Median	\$20	\$0	\$30
OPT TOUR	Mean	\$71.40	\$65.89	\$78.86
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$151.70	\$123.59	\$189.61
	Median	\$10	\$9	\$20
GIFT- OTHER	Mean	\$106.32	\$102.50	\$111.66
	Median	\$50	\$40	\$50
TRANS	Mean	\$16.62	\$14.39	\$19.65
	Median	\$0	\$0	\$0
OTHER	Mean	\$237.69	\$204.57	\$281.81
	Median	\$0	\$0	\$0
TOTAL	Mean	\$745.03	\$649.88	\$873.03
	Median	\$500	\$450	\$600

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

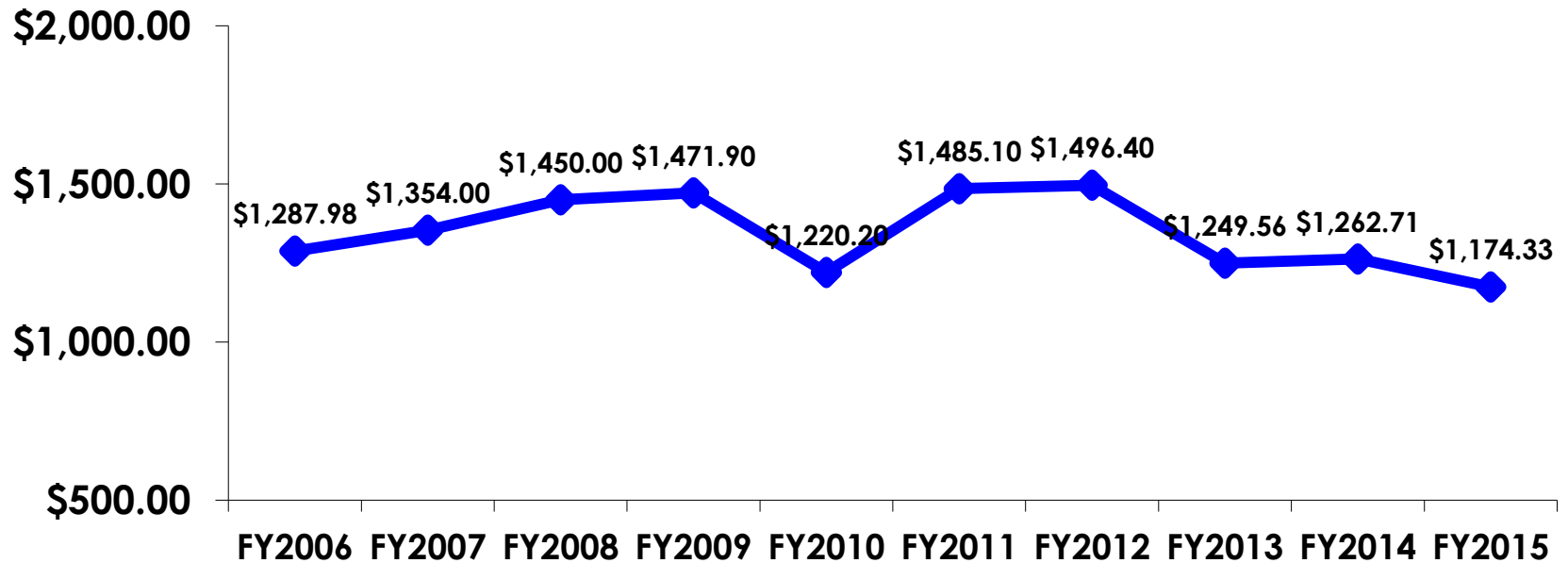
- \$1,174.33 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,646 = Maximum (highest amount recorded for the entire sample)

# ON-ISLE EXPENDITURES – Per Day





# TOTAL EXPENDITURES Per Person



# Breakdown of On-Island Expenditures

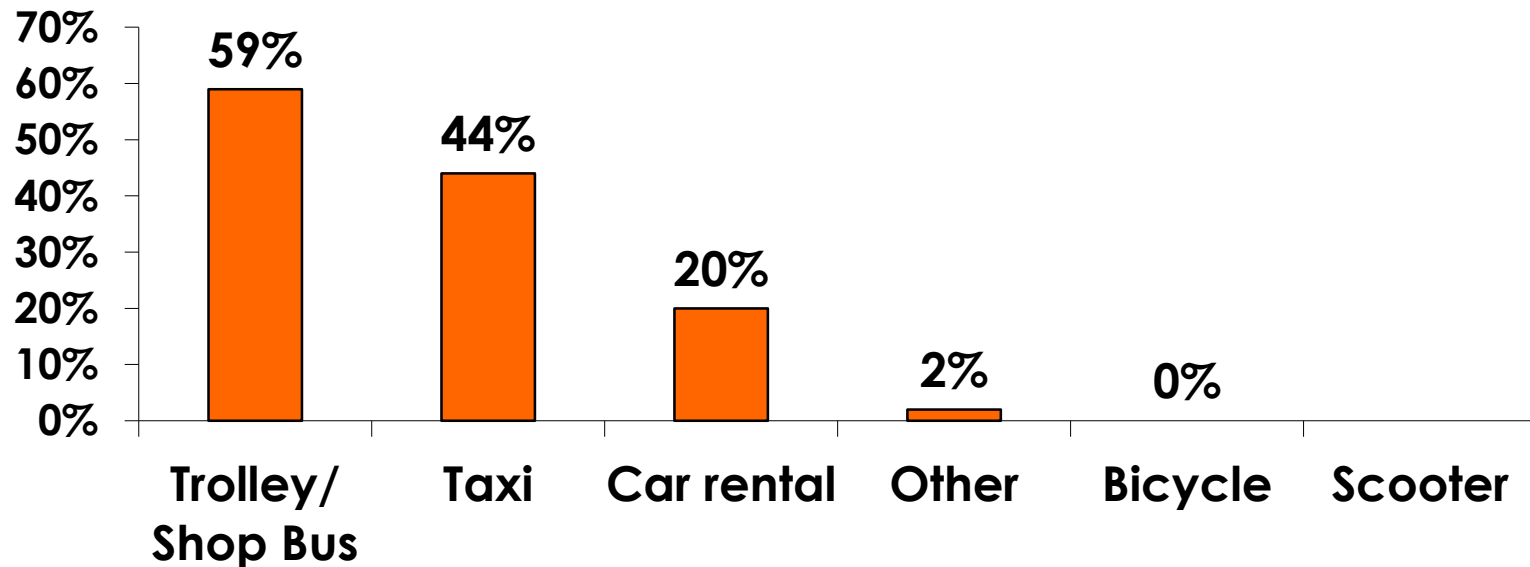
	MEAN \$
Food & beverage in a hotel	\$39.38
Food & beverage in fast food restaurant/convenience store	\$34.13
Food & beverage at restaurants or drinking establishments outside a hotel	\$88.17
Optional tours and activities	\$71.40
Gifts/ souvenirs for yourself/companions	\$151.70
Gifts/ souvenirs for friends/family at home	\$106.32
Local transportation	\$16.62
Other expenses not covered	\$237.69
<b>Average Total</b>	<b>\$745.03</b>

# Breakdown of On-Island Expenditures

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015
Food & beverage in a hotel	\$37.30	\$56.40	\$54.50	\$46.10	\$41.80	\$34.50	\$33.10	\$35.62	\$39.76	<b>\$39.38</b>
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	<b>\$34.13</b>
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	<b>\$88.17</b>
Optional tours and activities	\$122.40	\$127.10	\$119.30	\$119.40	\$96.10	\$95.30	\$97.10	\$83.82	\$79.19	<b>\$71.40</b>
Gifts/souvenirs for yourself/companions	\$380.80	\$338.40	\$287.10	\$354.00	\$245.40	\$253.30	\$258.00	\$204.79	\$203.01	<b>\$151.70</b>
Gifts/souvenirs for friends/family	\$181.60	\$174.70	\$143.70	\$181.90	\$126.50	\$129.30	\$136.40	\$121.09	\$121.41	<b>\$106.32</b>
Local transportation	\$15.10	\$20.00	\$16.70	\$17.50	\$17.30	\$15.20	\$16.50	\$16.36	\$18.60	<b>\$16.62</b>
Other expenses not covered	\$110.30	\$284.80	\$304.10	\$269.50	\$233.70	\$289.30	\$247.70	\$208.18	\$190.45	<b>\$237.69</b>
<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>	<b>\$745.03</b>

# Local Transportation

n=864



Mean=\$16.62 per travel party

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# Guam Airport Expenditures

- \$32.12 = Mean
- \$10 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,000 = Maximum (highest amount recorded for the entire sample)

# Breakdown of Airport Expenditures

	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	\$9.19
<b>Gifts/Souvenirs Self</b>	\$11.41
<b>Gifts/Souvenirs Others</b>	\$11.77
<b>Total</b>	<b>\$32.12</b>

# Breakdown of Airport

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015
<b>Food &amp; Beverage</b>	\$7.40	\$9.20	\$9.80	\$7.00	\$7.00	\$7.40	\$9.70	\$7.79	\$8.00	<b>\$9.19</b>
<b>Gifts/ Sou-venirs - Self</b>	\$9.50	\$18.40	\$13.00	\$15.00	\$15.20	\$14.90	\$12.40	\$9.31	\$10.60	<b>\$11.44</b>
<b>Gifts/ Sou-venirs - Others</b>	\$7.70	\$12.40	\$11.50	\$10.20	\$11.60	\$8.50	\$10.00	\$11.90	\$10.33	<b>\$11.77</b>
<b>Total</b>	\$24.40	\$39.80	\$34.20	\$32.10	\$33.20	\$30.80	\$32.10	\$28.95	\$28.96	<b>\$32.12</b>

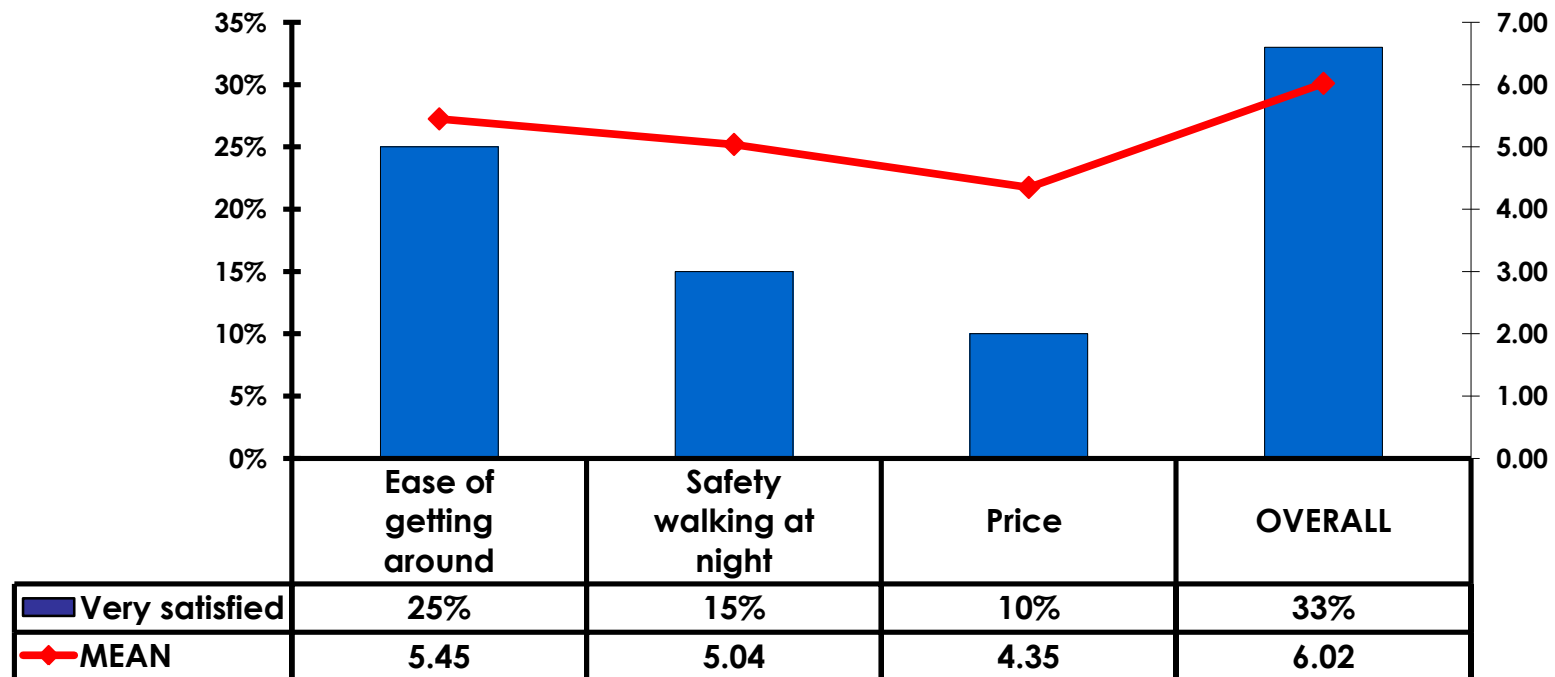
# SECTION 4 **VISITOR SATISFACTION**



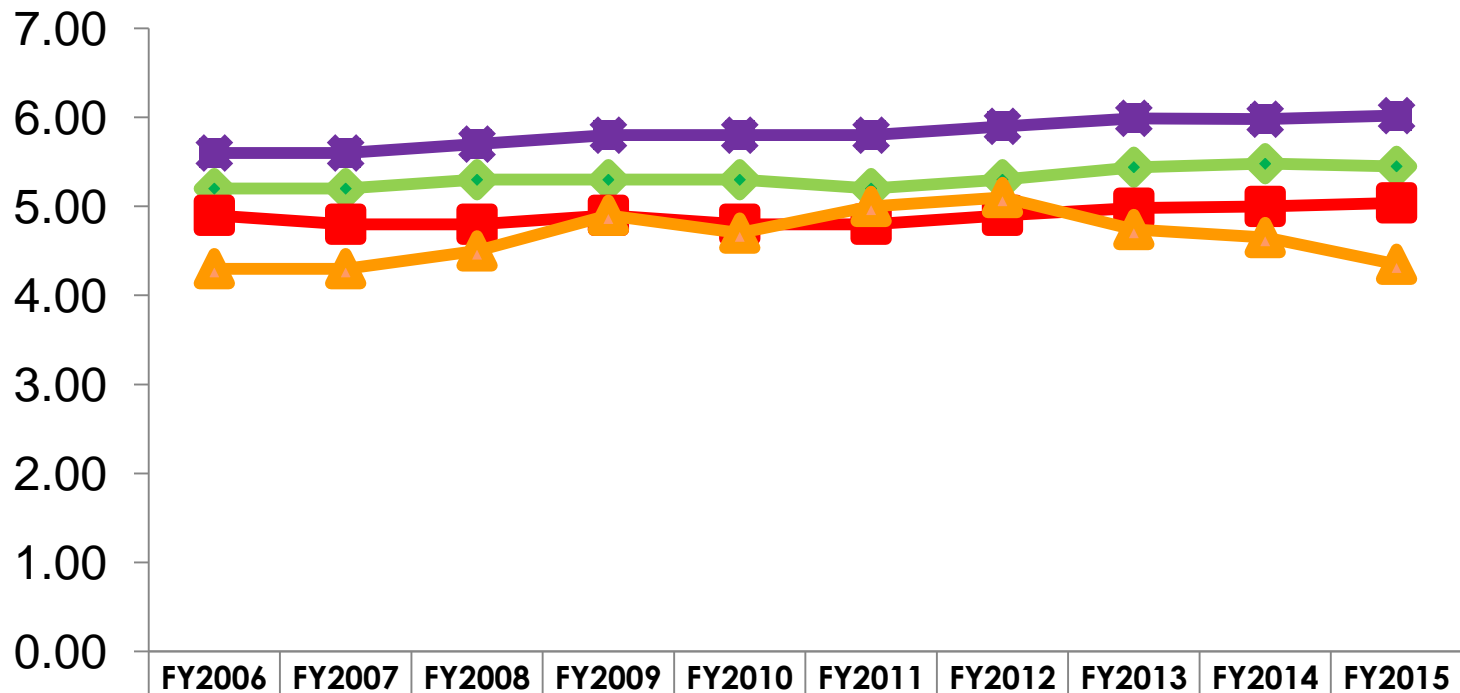
# Satisfaction Scores Overall

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Mean

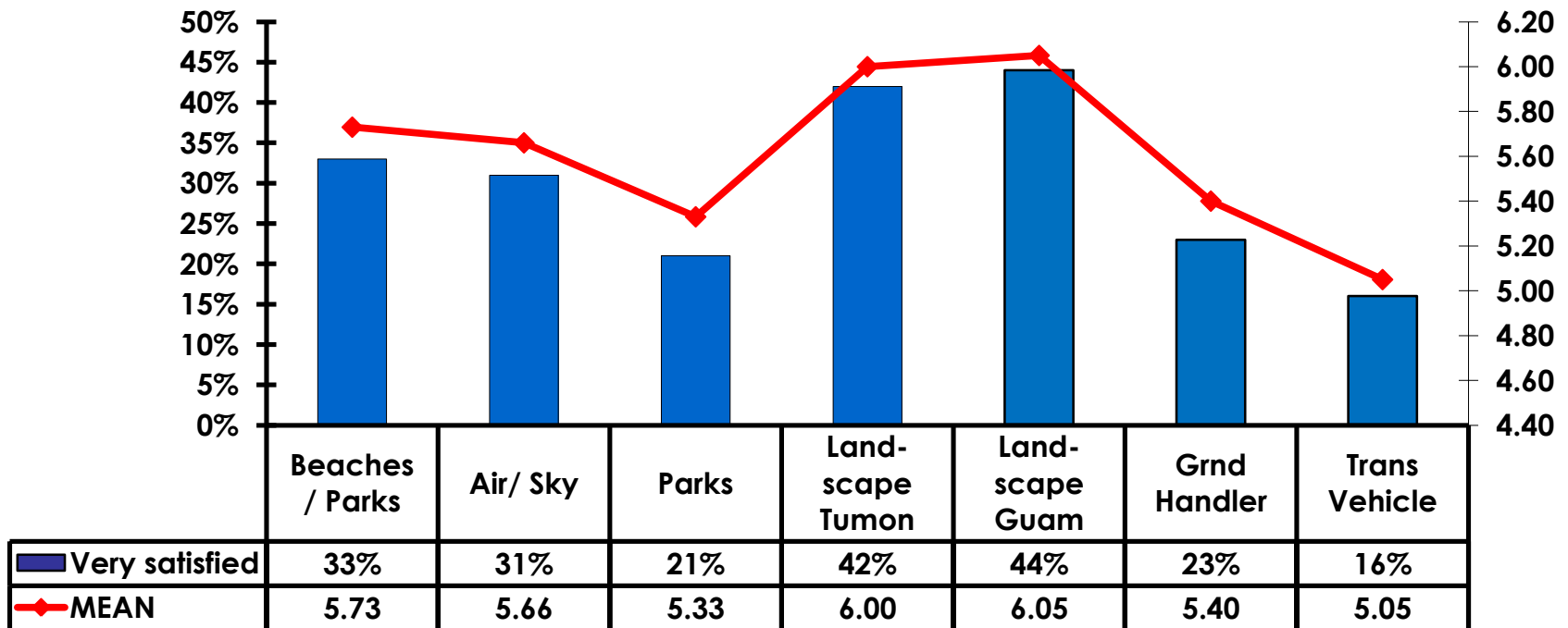


◆ Ease of getting around	5.20	5.20	5.30	5.30	5.30	5.20	5.30	5.44	5.48	5.45
■ Safety walking at night	4.90	4.80	4.80	4.90	4.80	4.80	4.90	4.98	5.00	5.04
▲ Price	4.30	4.30	4.50	4.90	4.70	5.00	5.10	4.74	4.65	4.35
★ OVERALL	5.60	5.60	5.70	5.80	5.80	5.80	5.90	5.99	5.98	6.02

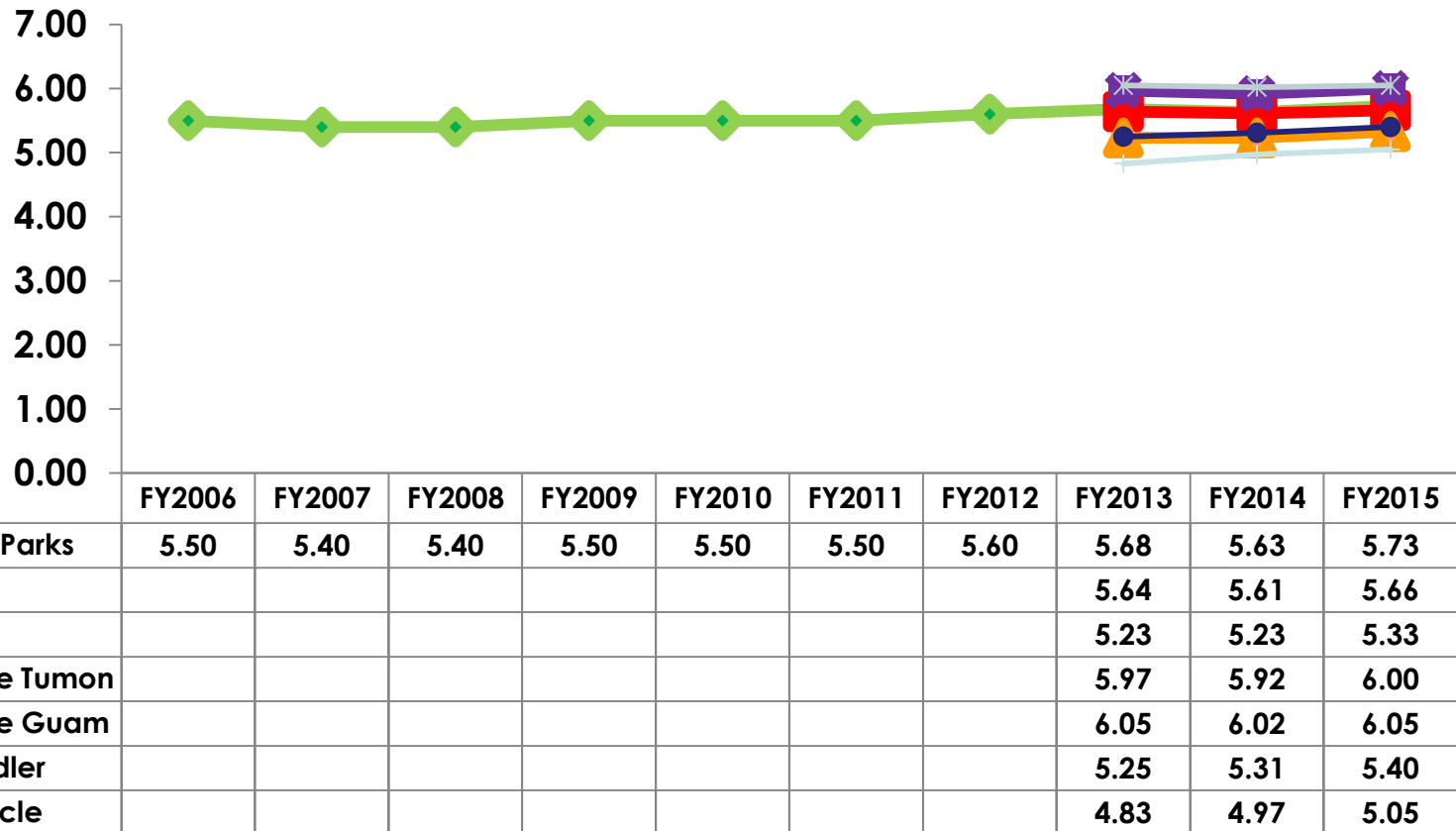
# Satisfaction Quality/ Cleanliness

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



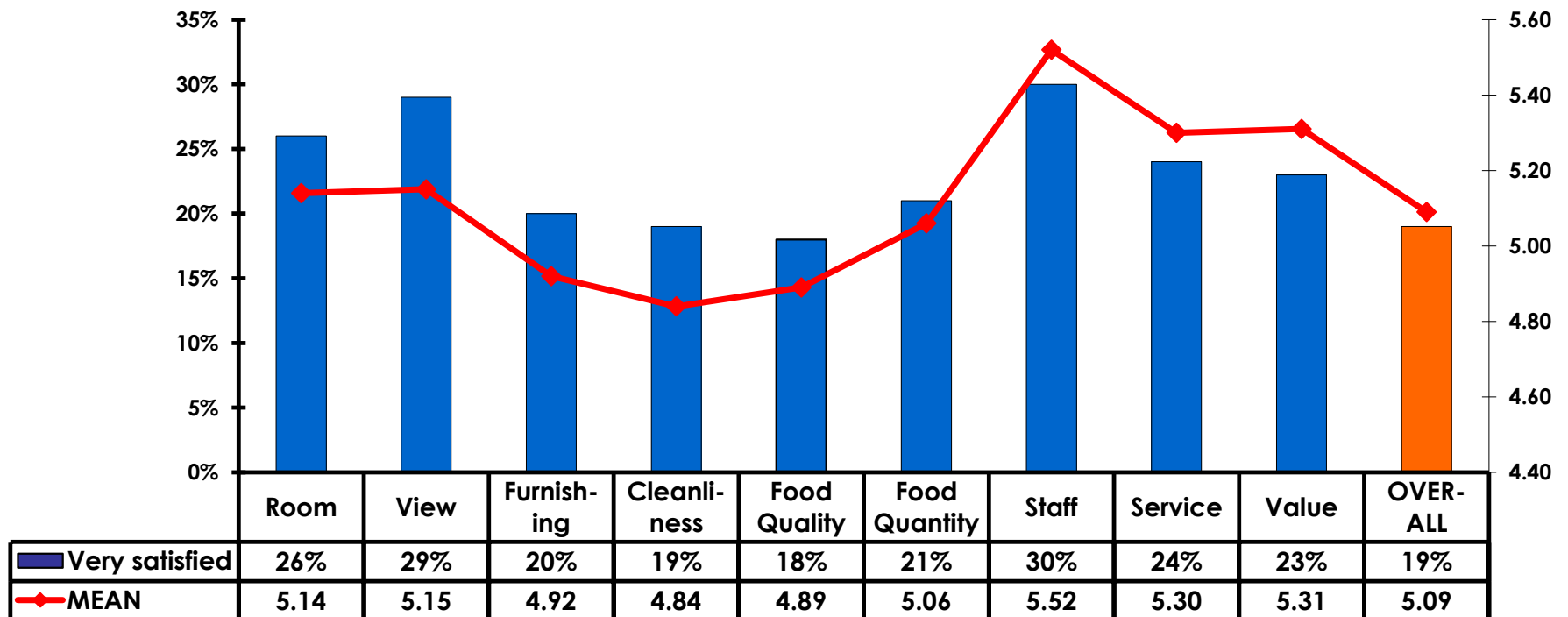
# Satisfaction Quality/ Cleanliness



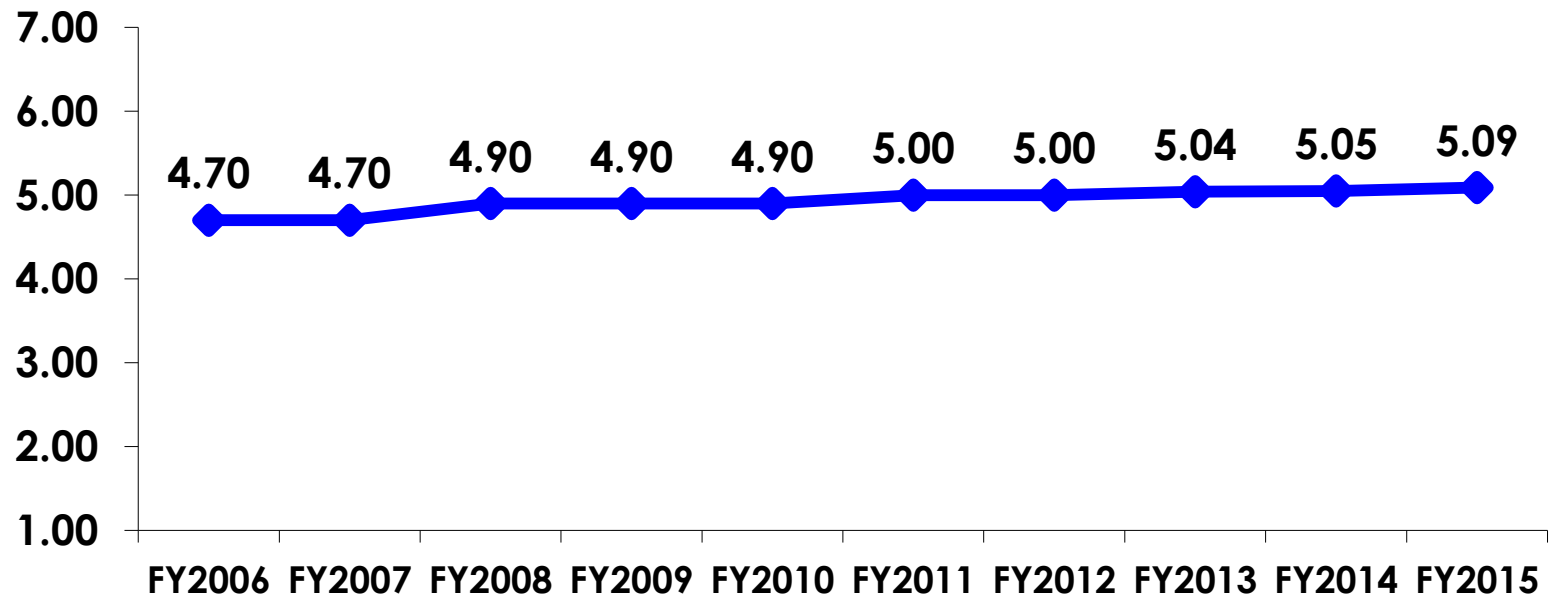
# Quality of Accommodations

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



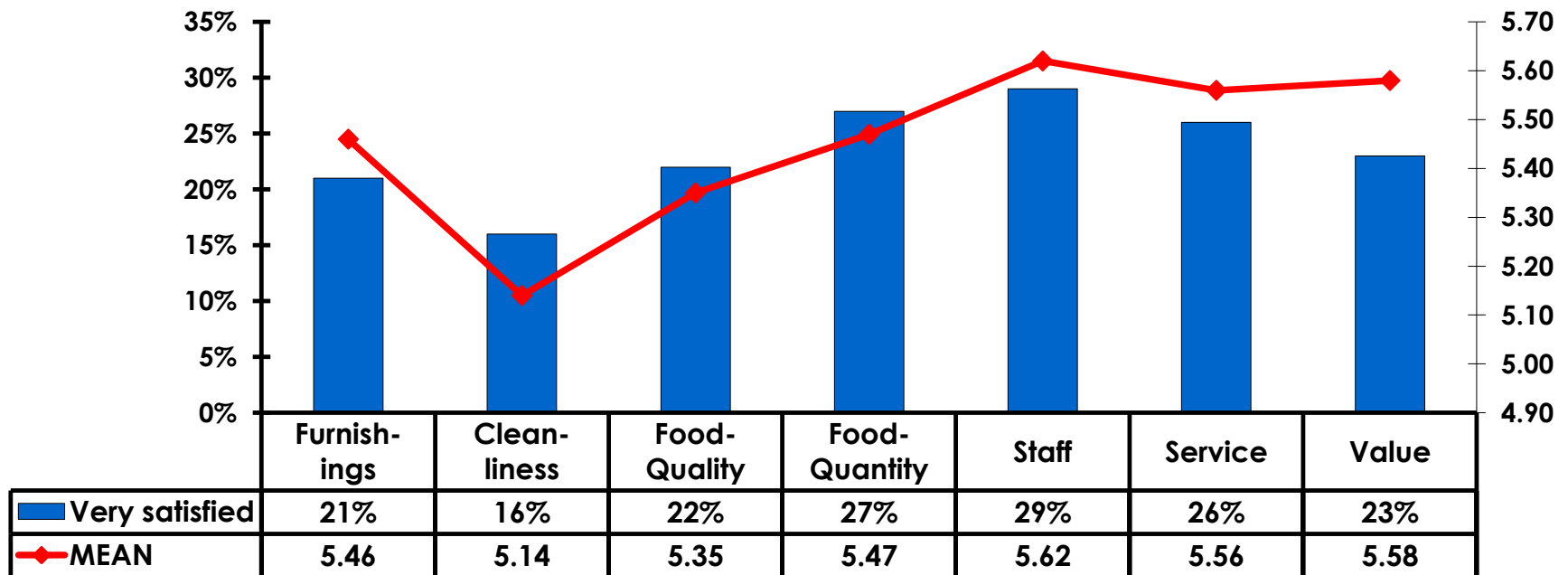
# Accommodations Overall Satisfaction



# Quality of Dining Experience

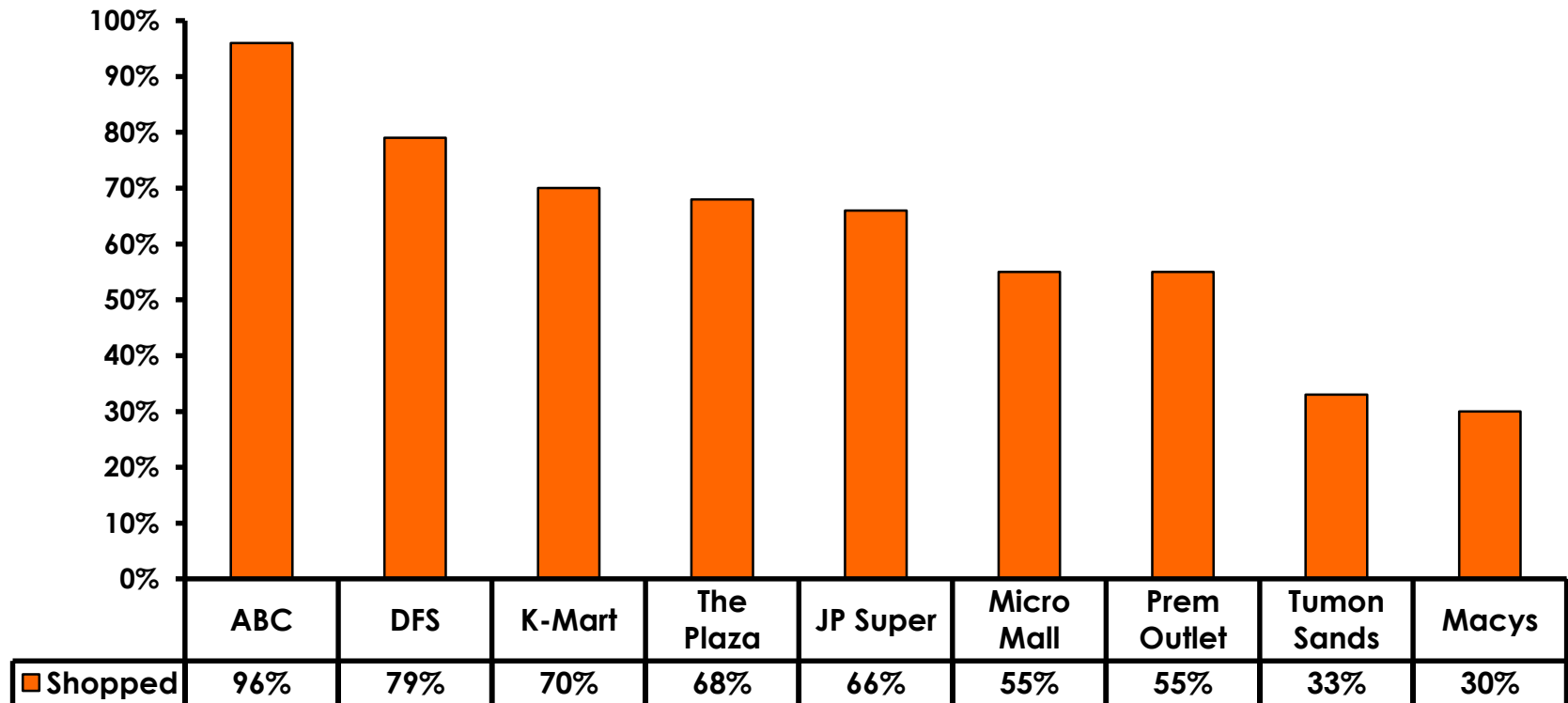
7pt Rating Scale

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	FY2015
<b>ABC</b>	94%	95%	96%	95%	94%	94%	95%	95%	95%	<b>96%</b>
<b>DFS Galleria</b>	95%	95%	94%	92%	89%	91%	90%	87%	85%	<b>79%</b>
<b>The Plaza</b>	54%	56%	60%	60%	57%	62%	66%	67%	69%	<b>68%</b>
<b>JP Super</b>	Not top6	Not top6	Not top6	Not top6	Not top6	63%	71%	67%	65%	<b>66%</b>
<b>K-Mart</b>	55%	58%	66%	61%	64%	64%	62%	66%	66%	<b>70%</b>
<b>Micro Mall</b>	66%	70%	72%	71%	65%	64%	65%	64%	60%	<b>55%</b>
<b>Prem Outlet</b>	59%	56%	63%	64%	58%	Not top6	Not top6	Not top6	Not top6	<b>55%</b>

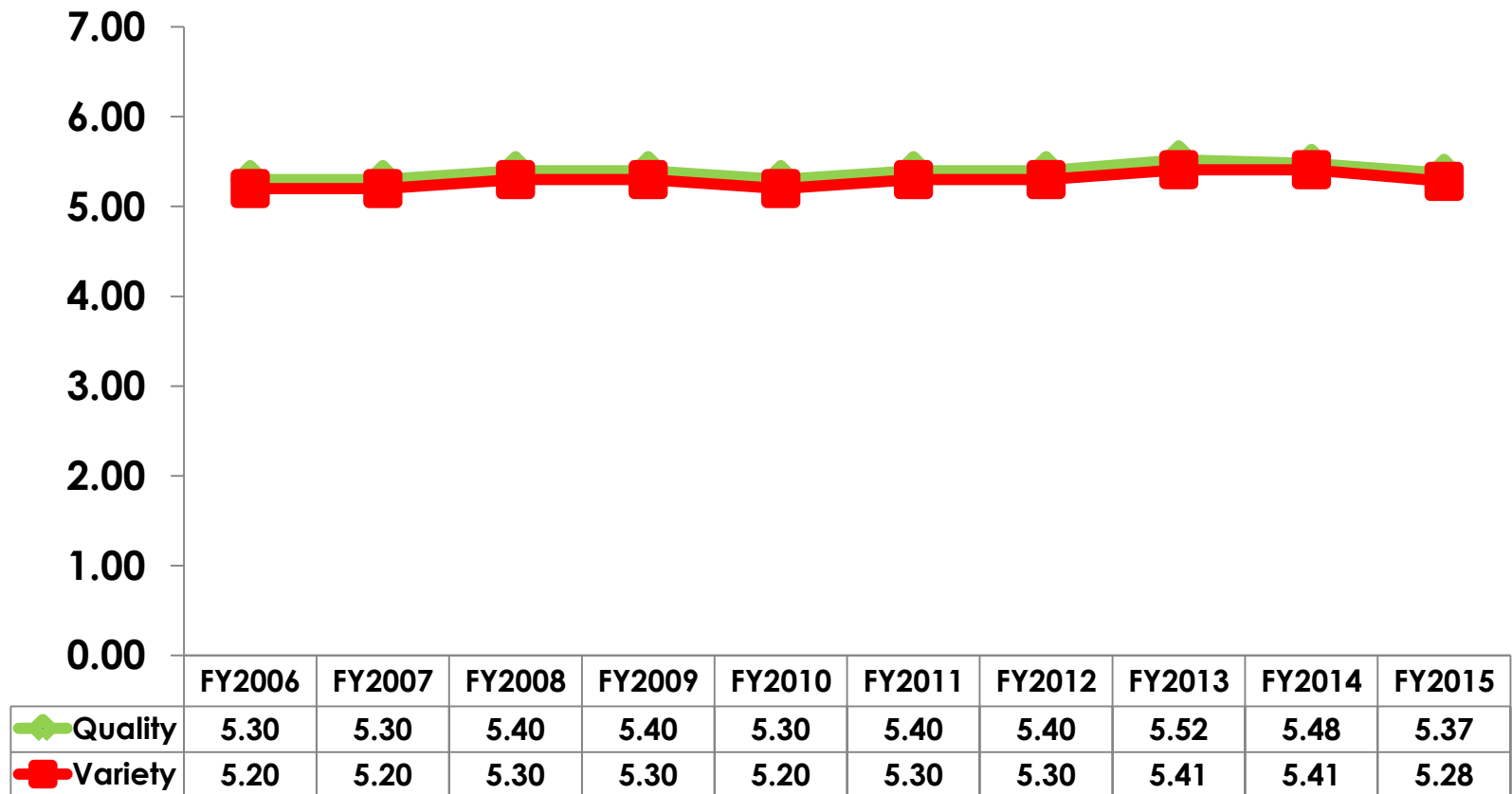
# Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

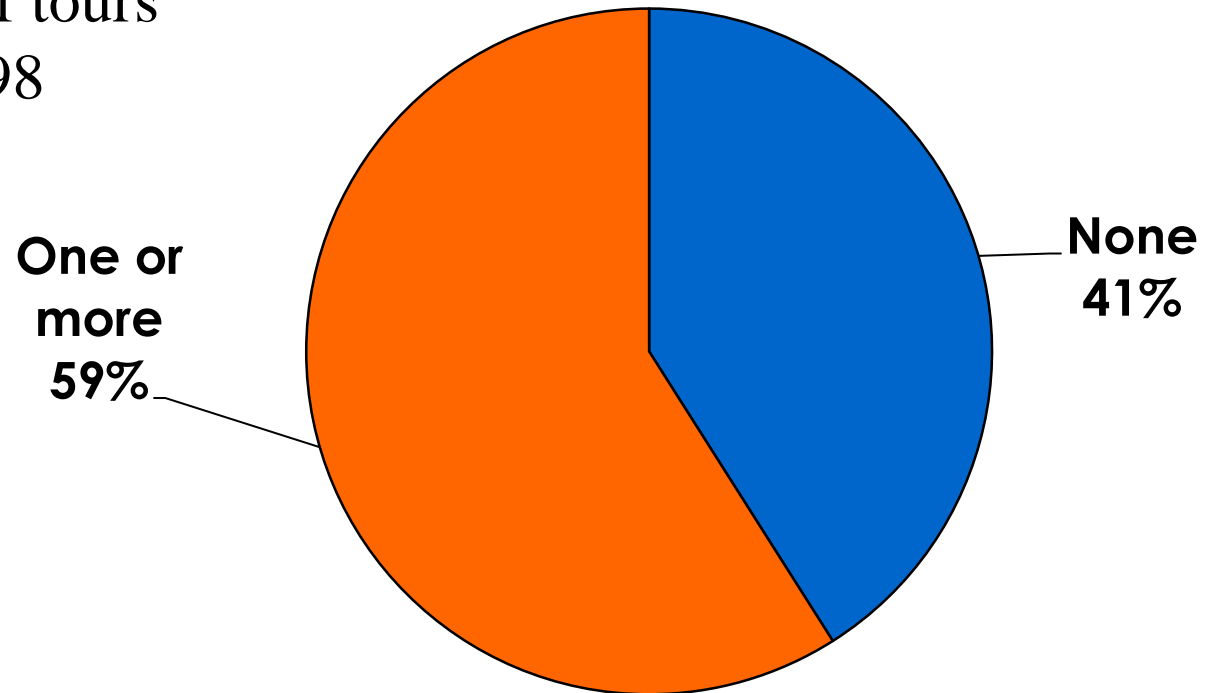
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>52%</b>	Score of 6 to 7 = <b>49%</b>
Score of 4 to 5 = <b>43%</b>	Score of 4 to 5 = <b>42%</b>
Score 1 to 3 = <b>5%</b>	Score 1 to 3 = <b>8%</b>
<b>MEAN = 5.37</b>	<b>MEAN = 5.28</b>

# Satisfaction - Shopping

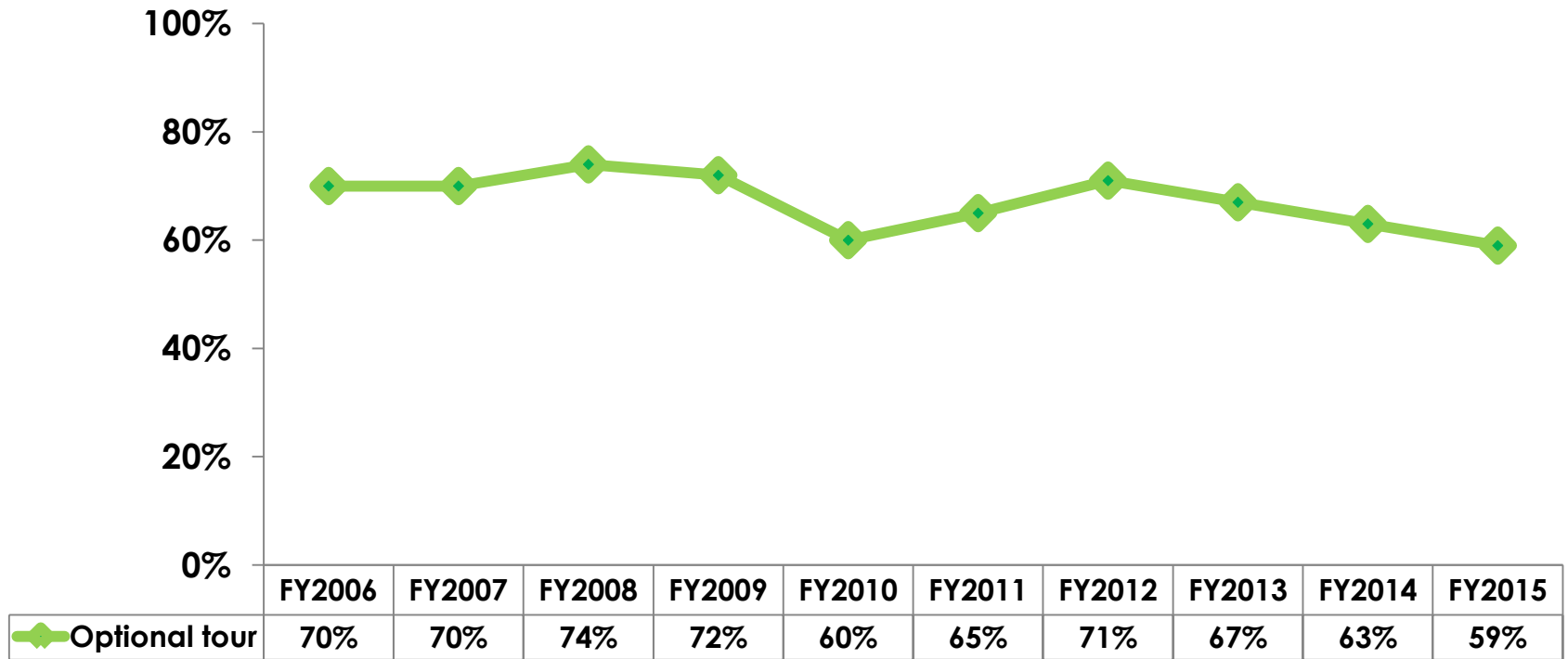


# Optional Tour Participation

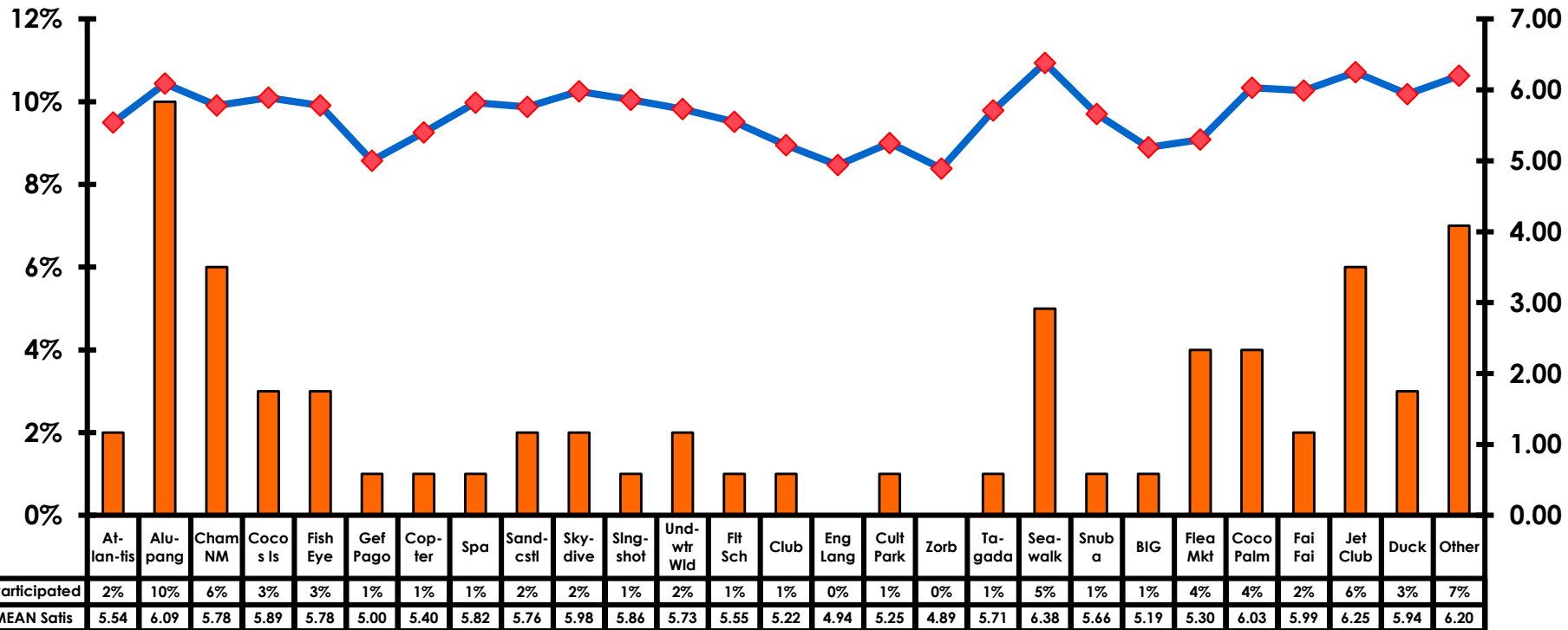
- Average number of tours participated in is .98



# Optional Tours



# Optional Tours Participation & Satisfaction



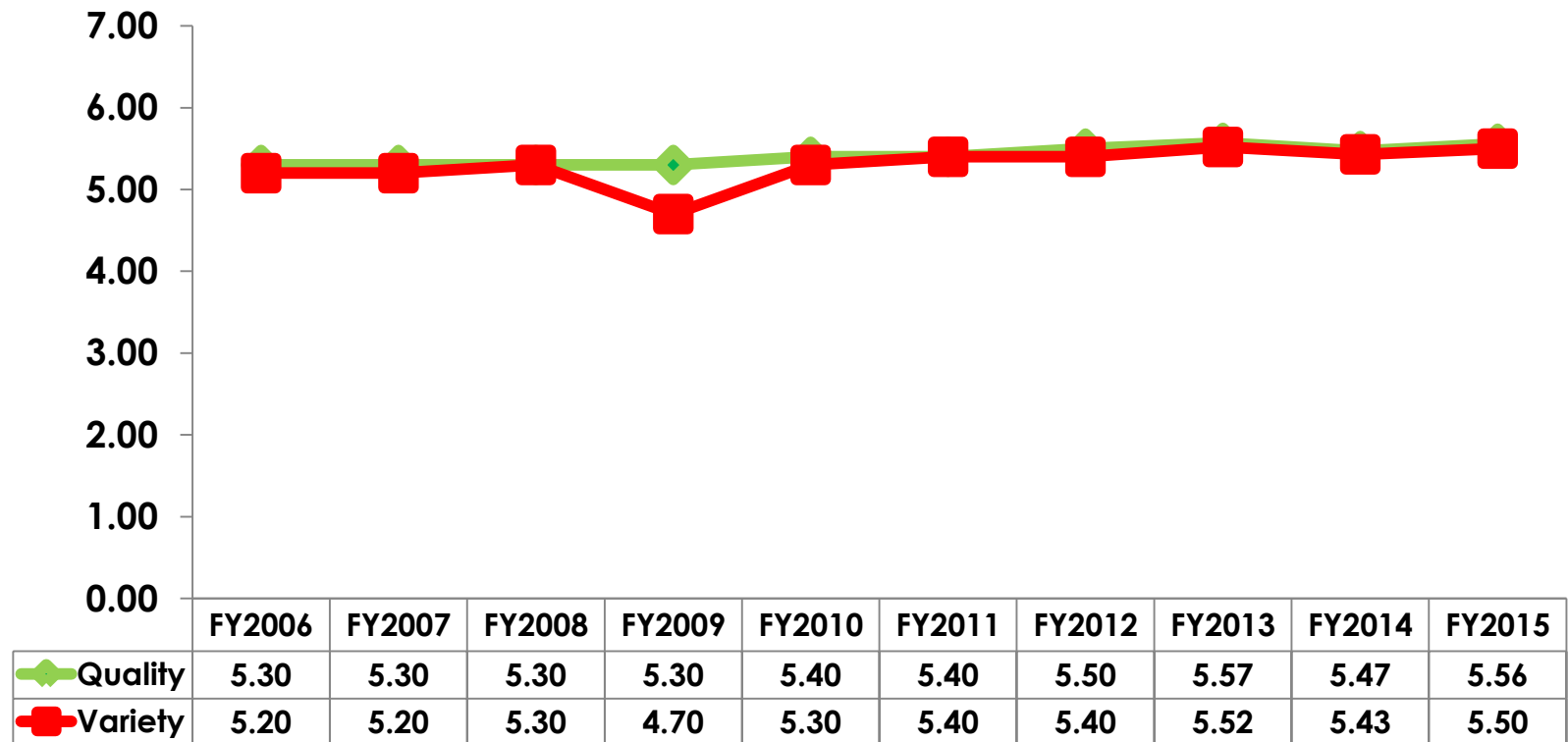
# Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = <b>59%</b>	Score of 6 to 7 = <b>56%</b>
Score of 4 to 5 = <b>40%</b>	Score of 4 to 5 = <b>43%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 5.56</b>	<b>MEAN = 5.50</b>

# Satisfaction – Day Tours





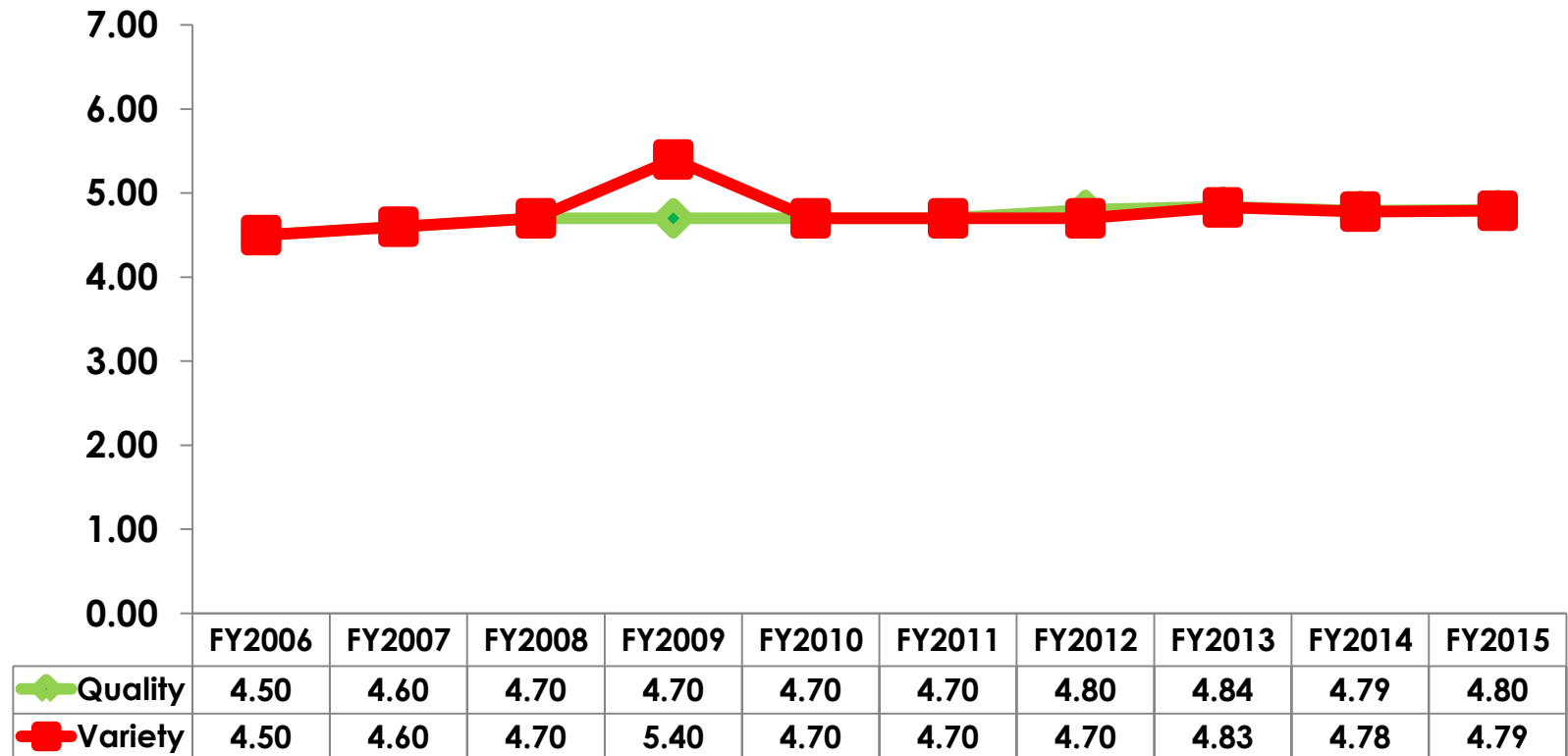
# Night Tours Satisfaction

7pt Rating Scale

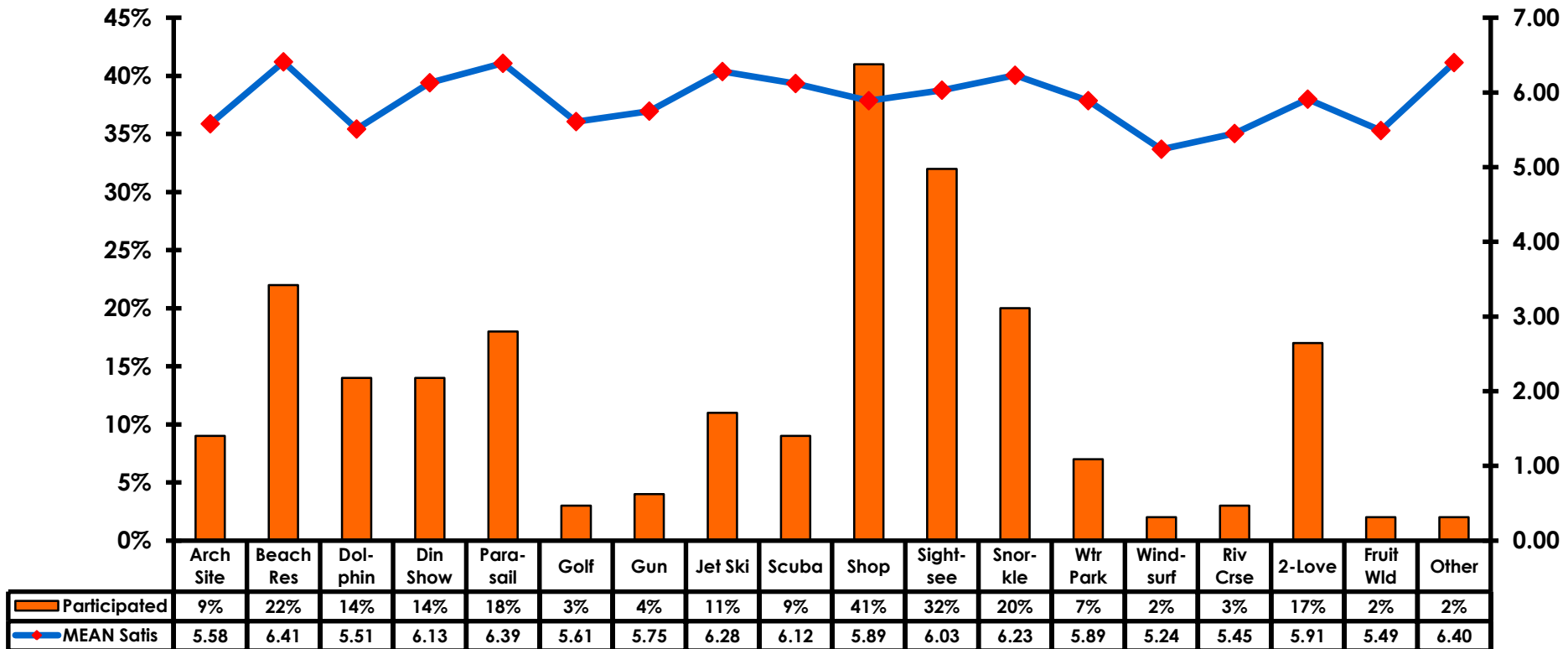
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>30%</b>	Score of 6 to 7 = <b>30%</b>
Score of 4 to 5 = <b>68%</b>	Score of 4 to 5 = <b>68%</b>
Score 1 to 3 = <b>2%</b>	Score 1 to 3 = <b>3%</b>
<b>MEAN = 4.80</b>	<b>MEAN = 4.79</b>

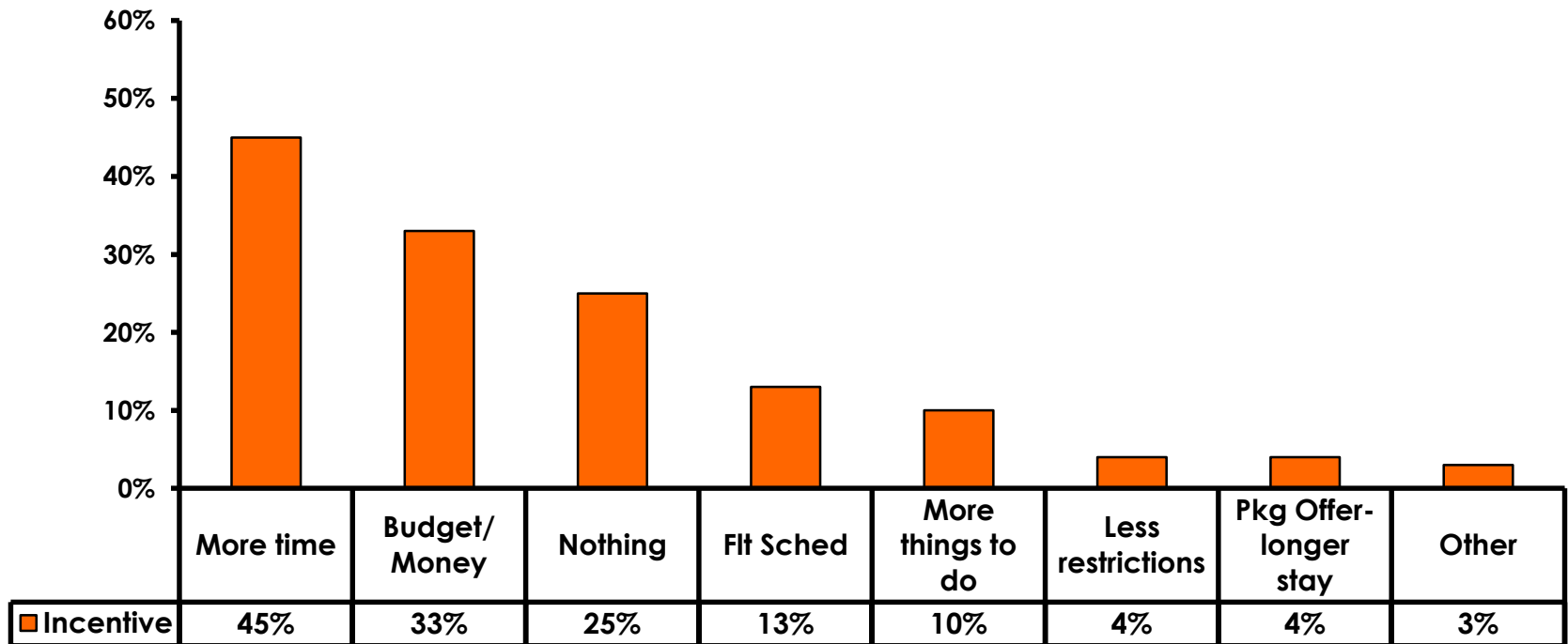
# Satisfaction – Night Tours



# Satisfaction with Other Activities



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



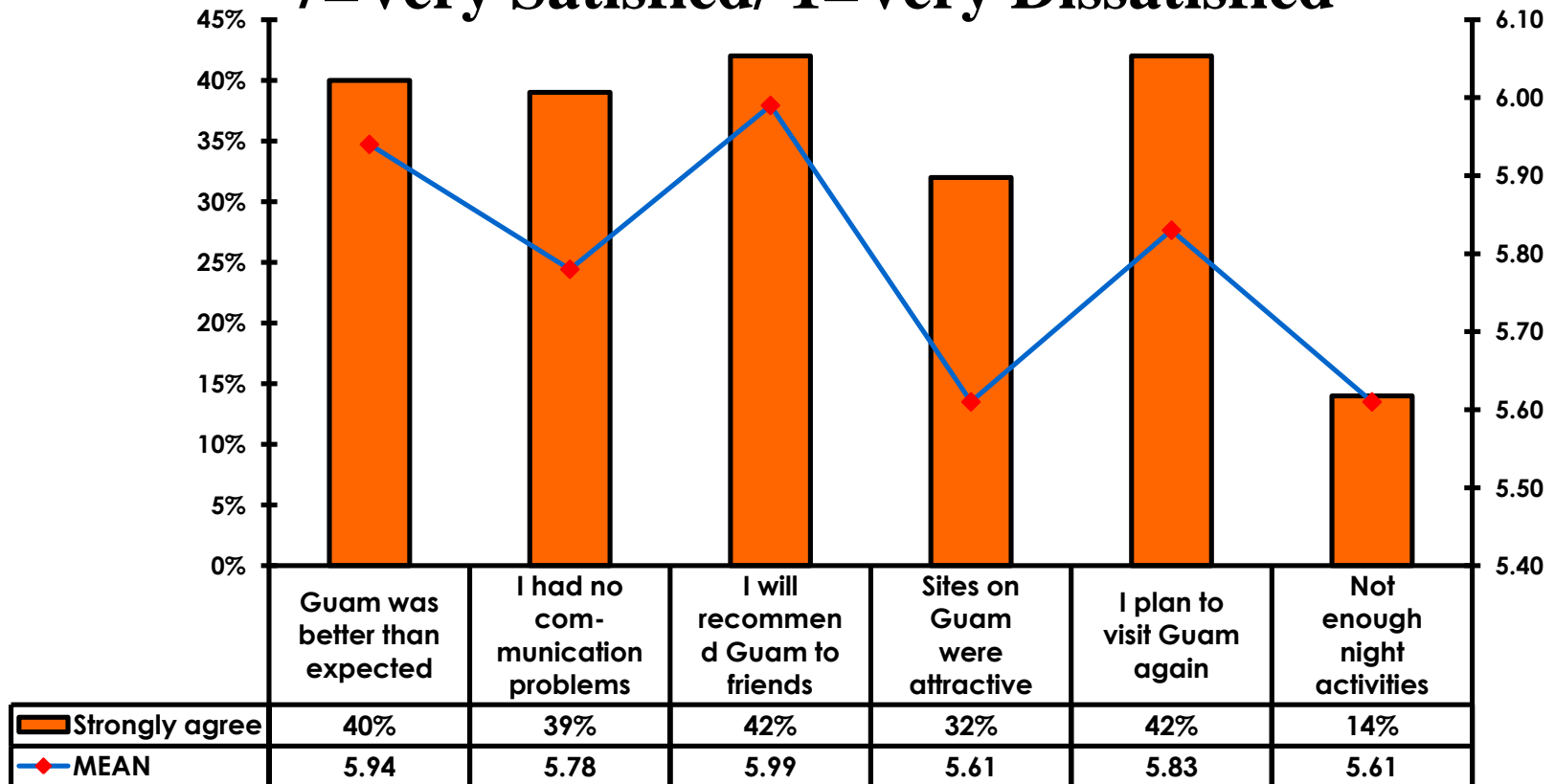
# What would it take to make you want to stay an extra day in Guam?

	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015
More time	46%	52%	51%	48%	48%	45%	<b>45%</b>
Budget/ money	35%	31%	35%	34%	29%	30%	<b>33%</b>
Nothing- spent right amount of time	19%	17%	18%	19%	24%	27%	<b>25%</b>
More things to do	12%	11%	9%	12%	9%	9%	<b>10%</b>
Less restrictions	7%	6%	5%	6%	4%	4%	<b>4%</b>
Flight schedule times	14%	17%	20%	16%	14%	12%	<b>13%</b>
Packages – longer stays	-	-	1%	4%	3%	3%	<b>4%</b>
Other	5%	4%	3%	3%	2%	3%	<b>3%</b>

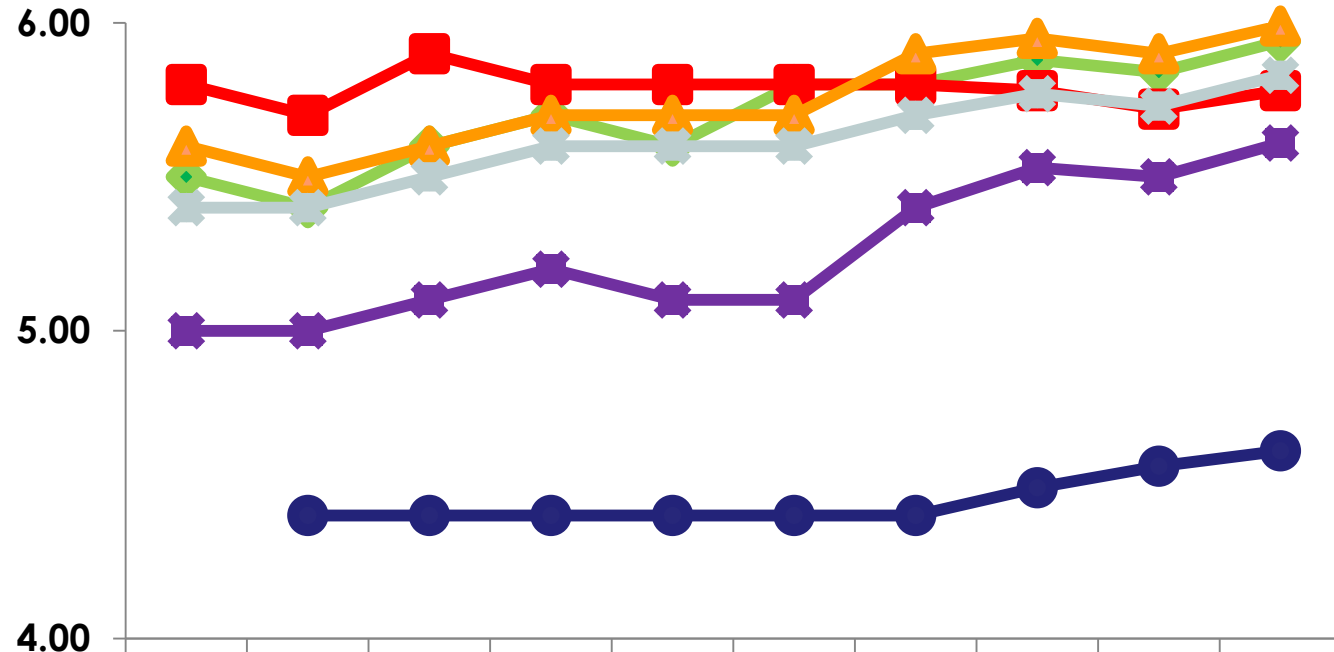
# On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



# On-Island Perceptions

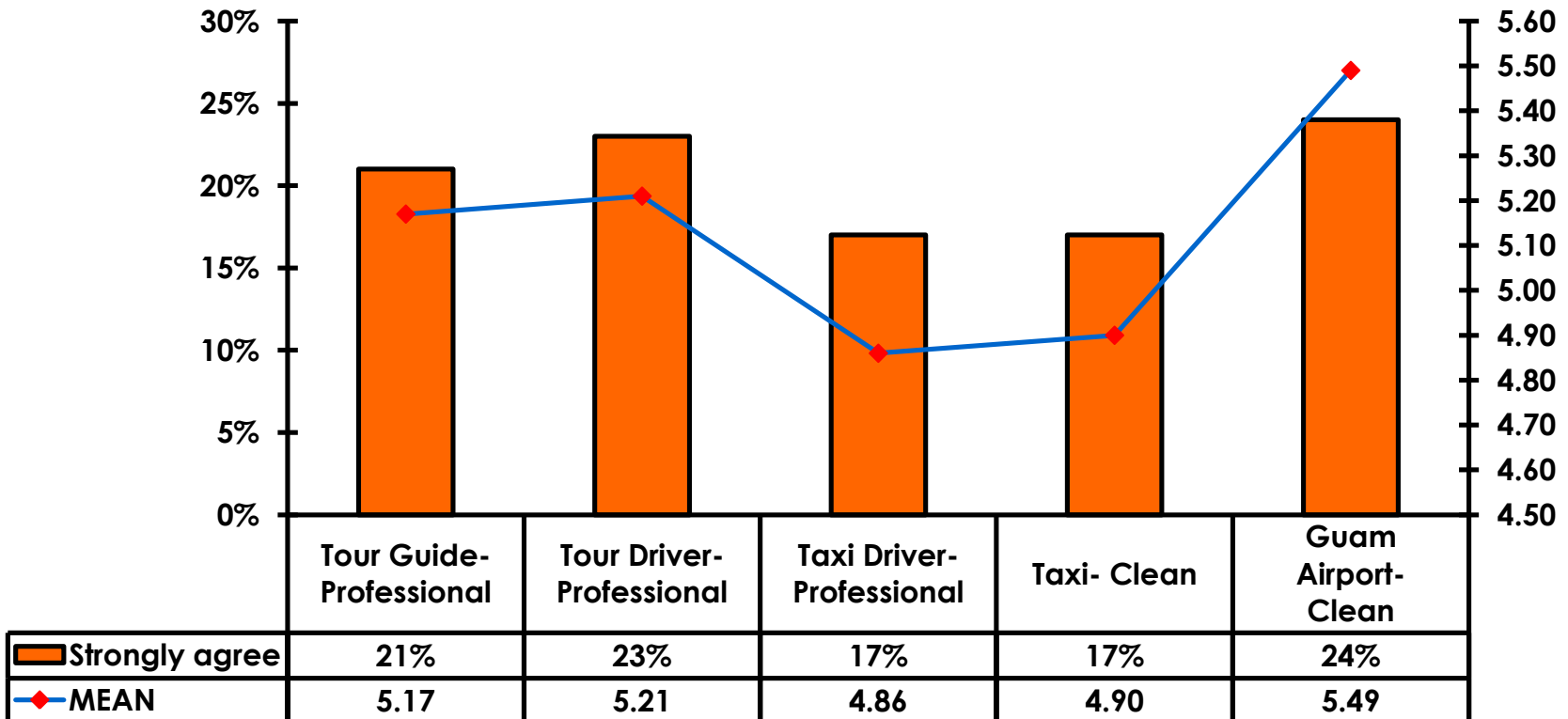


	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015
 Guam was better than expected	5.50	5.40	5.60	5.70	5.60	5.80	5.80	5.88	5.84	5.94
 I had no communication problems	5.80	5.70	5.90	5.80	5.80	5.80	5.80	5.78	5.72	5.78
 I will recommend Guam to friends	5.60	5.50	5.60	5.70	5.70	5.70	5.90	5.95	5.90	5.99
 Sites on Guam were attractive	5.00	5.00	5.10	5.20	5.10	5.10	5.40	5.53	5.50	5.61
 I plan to visit Guam again	5.40	5.40	5.50	5.60	5.60	5.60	5.70	5.77	5.73	5.83
 Not enough night activities		4.40	4.40	4.40	4.40	4.40	4.40	4.49	4.56	4.61

# On-Island Perceptions

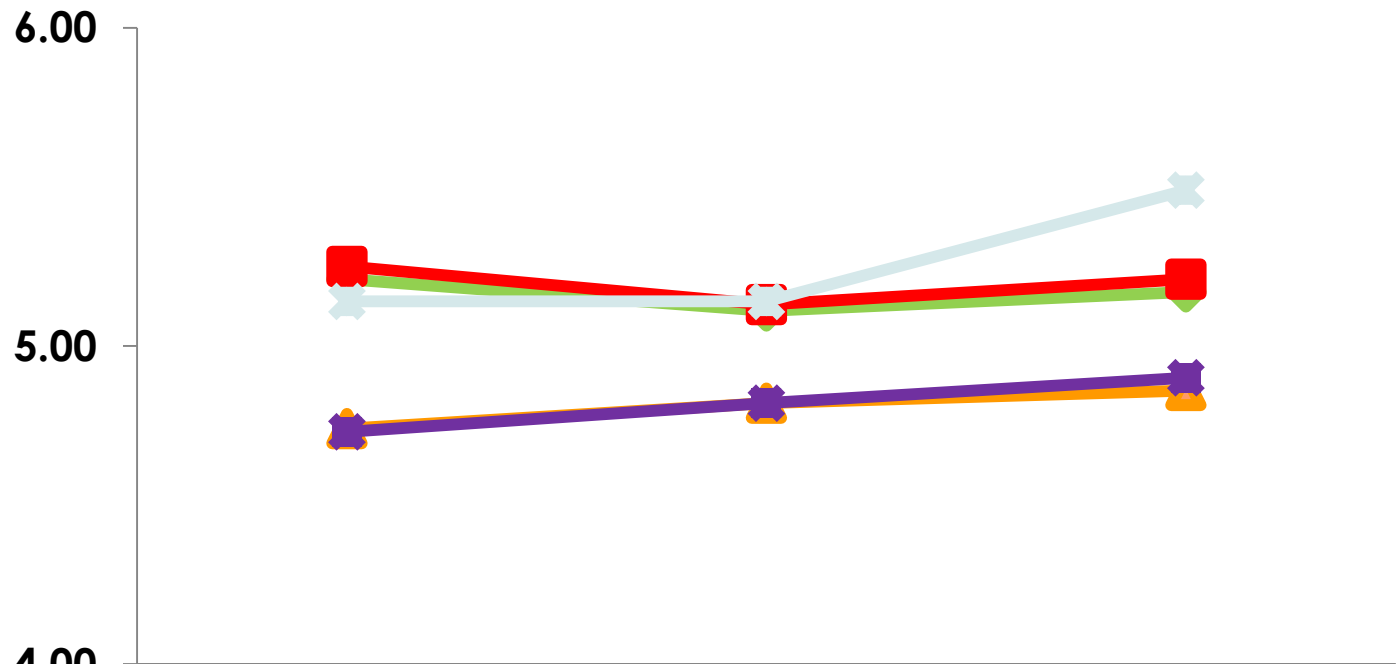
7pt Rating Scale





7=Very Satisfied/ 1=Very Dissatisfied





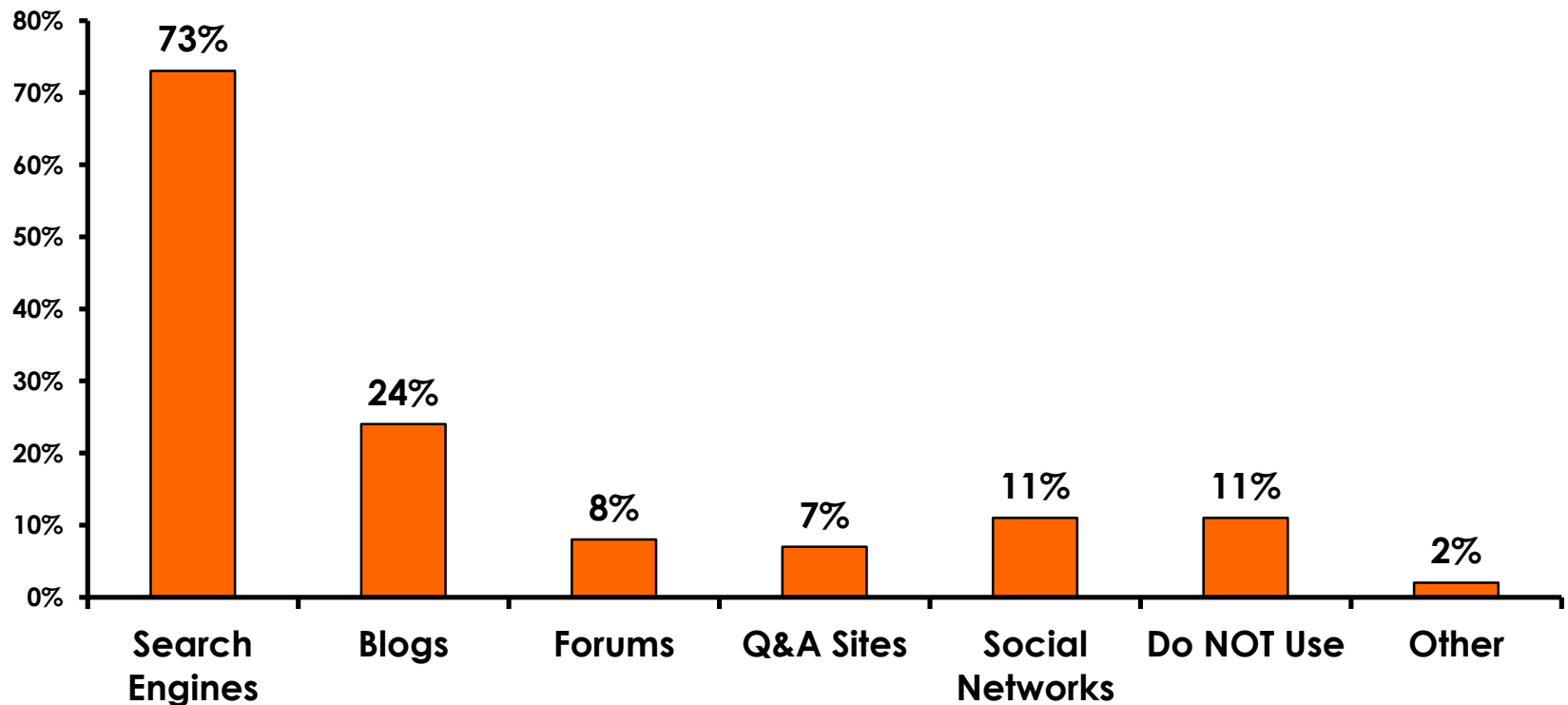
# On-Island Perceptions



	FY2013	FY2014	FY2015
 Tour Guide- professional	5.21	5.11	5.17
 Tour Driver- professional	5.25	5.13	5.21
 Taxi - Professional	4.74	4.82	4.86
 Taxi- clean	4.73	4.82	4.90
 Guam Airport- Clean	5.14	5.14	5.49

# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info

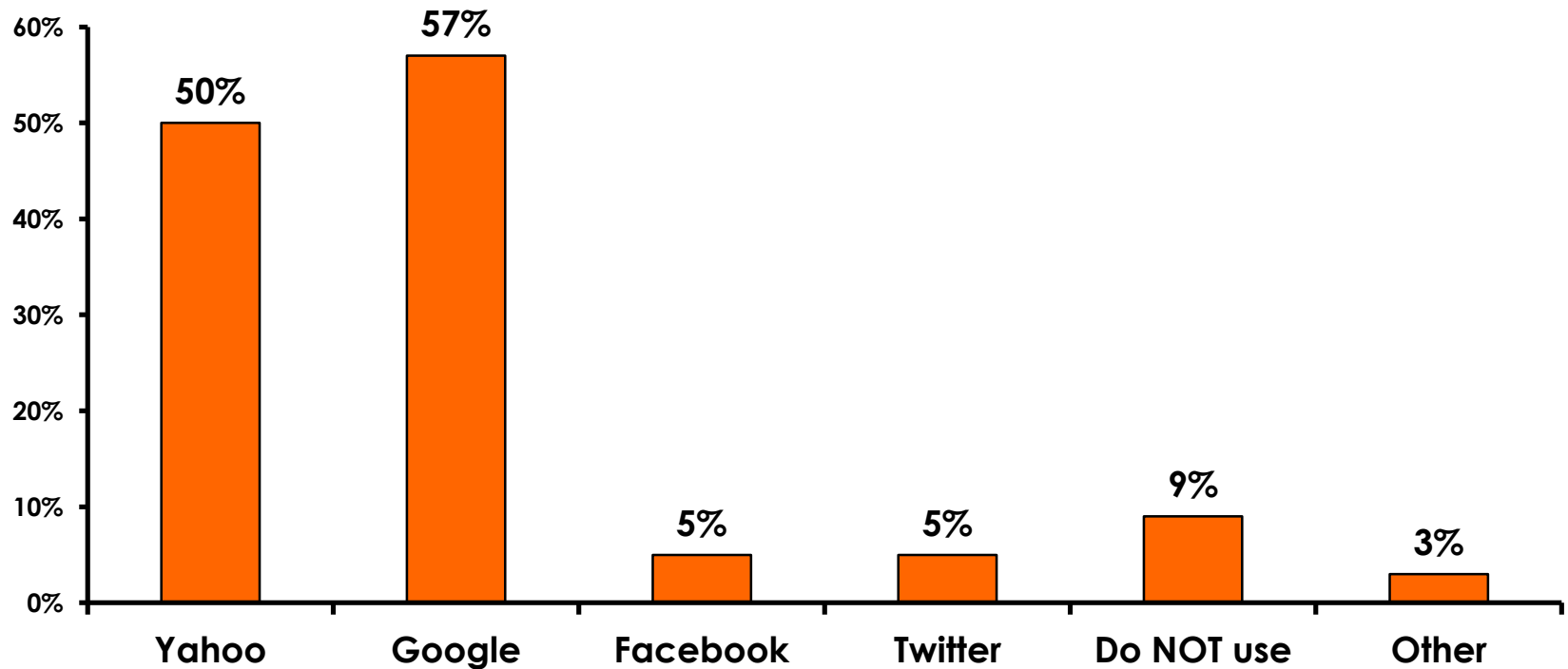


# Internet- Guam Sources of Info

	FY2013	FY2014	FY2015
Search engines	70%	71%	<b>73%</b>
Blogs	20%	22%	<b>24%</b>
None	15%	14%	<b>11%</b>
Q&A sites	10%	8%	<b>7%</b>
Social Network	8%	8%	<b>11%</b>
Forums	9%	8%	<b>8%</b>
Other	2%	1%	<b>2%</b>

# Internet- Things To Do

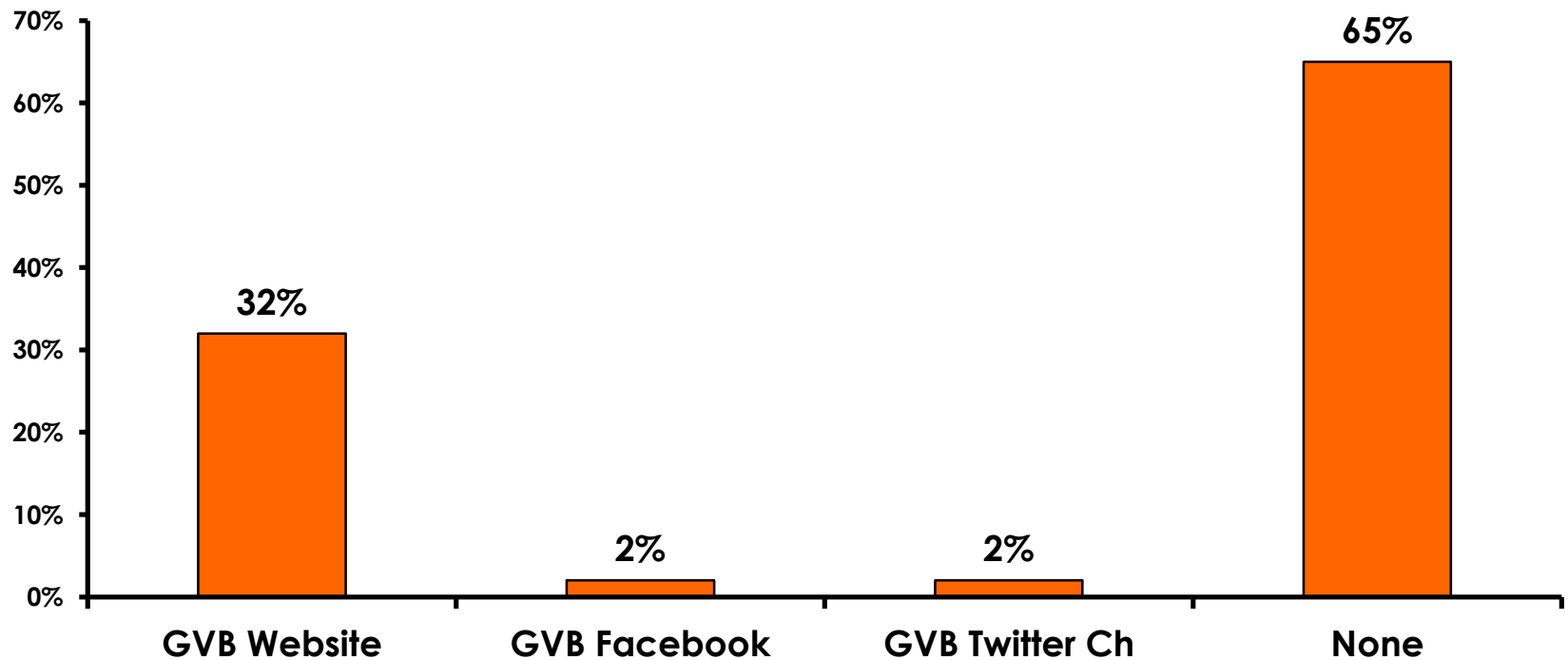
## Sources of Info



# Internet- Things To Do Sources of Info

	FY2013	FY2014	FY2015
Google	50%	54%	<b>57%</b>
Yahoo	55%	52%	<b>50%</b>
Do Not Use Internet	15%	12%	<b>9%</b>
Facebook	3%	3%	<b>5%</b>
Twitter	2%	3%	<b>5%</b>
Other	3%	2%	<b>3%</b>

# Internet- GVB Sources

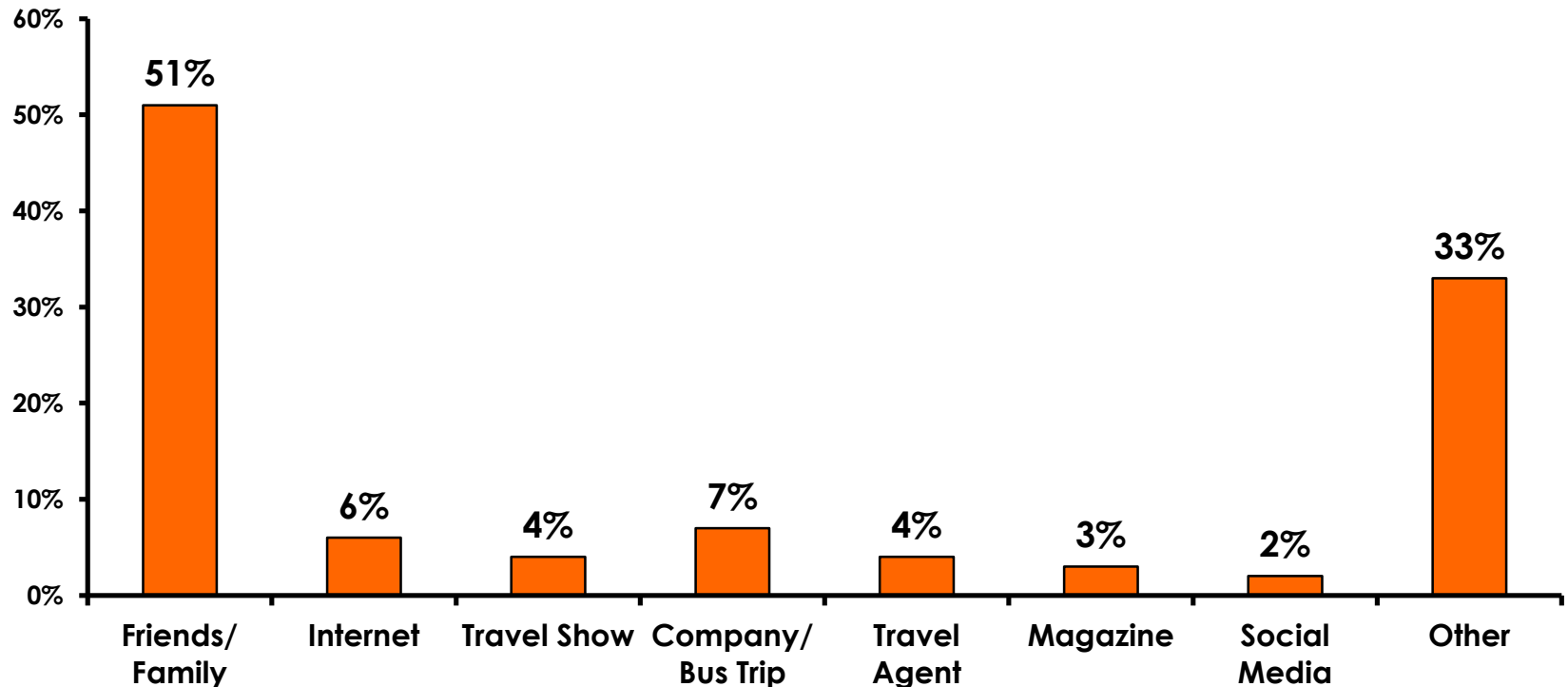


# Internet- GVB Sources

	<b>FY2013</b>	<b>FY2014</b>	<b>FY2015</b>
None	65%	65%	<b>65%</b>
GVB Website	33%	33%	<b>32%</b>
GVB Facebook	2%	2%	<b>2%</b>
GVB Twitter	1%	1%	<b>2%</b>



# Travel Motivation- Info Sources

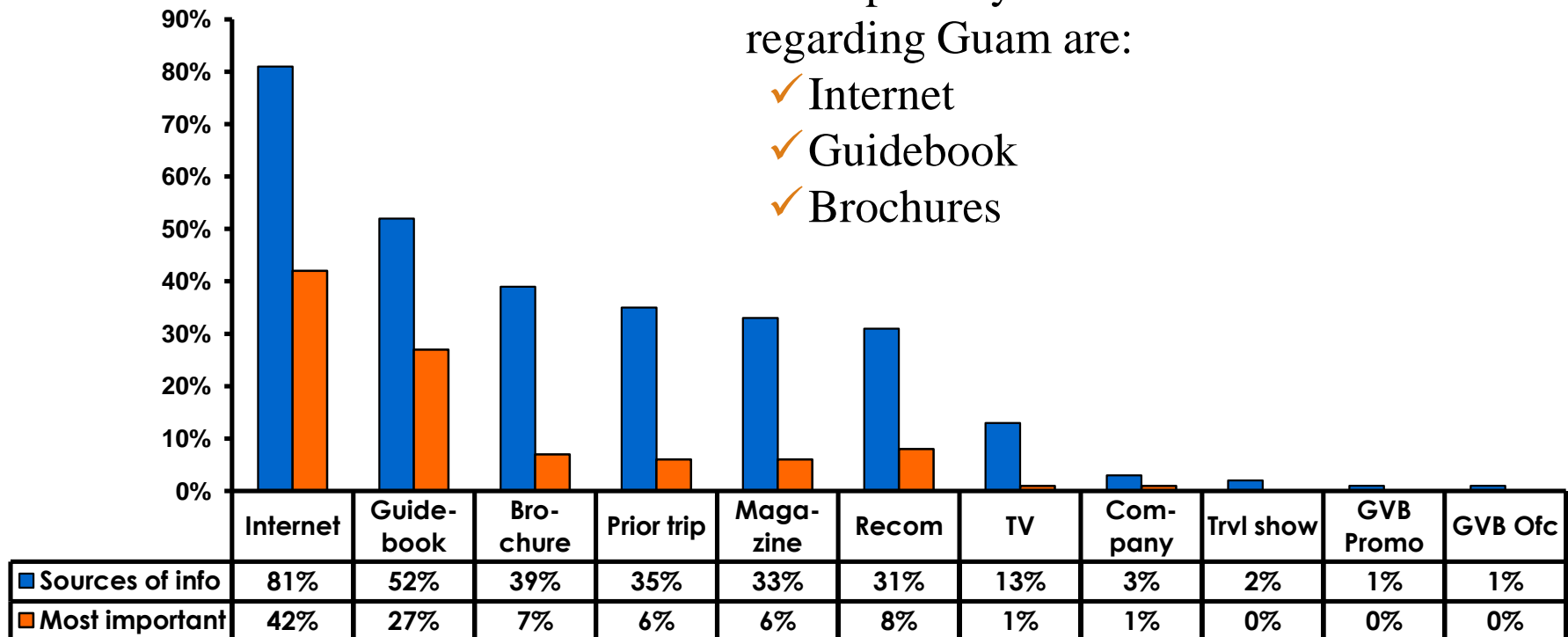


# Travel Motivation- Info Sources

	FY2013	FY2014	FY2015
Friends/ Family	56%	49%	<b>51%</b>
Other	23%	32%	<b>33%</b>
Company/ Business trip	4%	10%	<b>7%</b>
Internet	8%	6%	<b>6%</b>
Travel show	8%	4%	<b>4%</b>
Travel agent	6%	4%	<b>4%</b>
Magazine	4%	3%	<b>3%</b>
Social media	1%	1%	<b>2%</b>

# Sources of Information Pre-arrival

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

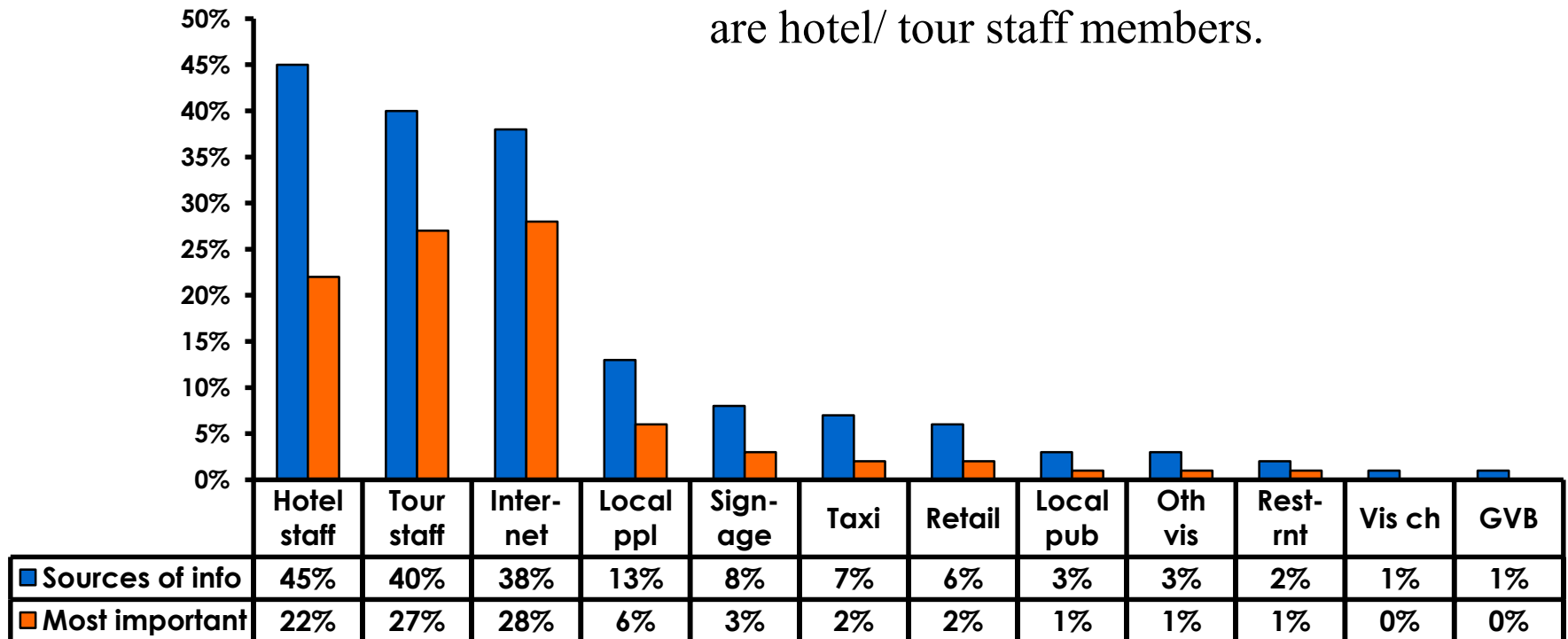


# Pre-Arrival Sources – Top 3 Most Important

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015
<b>Guide-book</b>	43%	36%	41%	36%	34%	37%	39%	32%	27%	<b>27%</b>
<b>Internet</b>	22%	28%	25%	30%	36%	34%	32%	33%	38%	<b>42%</b>
<b>Brochure</b>	15%	16%	15%	15%	11%	12%	10%	9%	8%	<b>Not Top 3</b>
<b>Friend/Relative</b>	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	<b>8%</b>

# Sources of Information Post-arrival

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



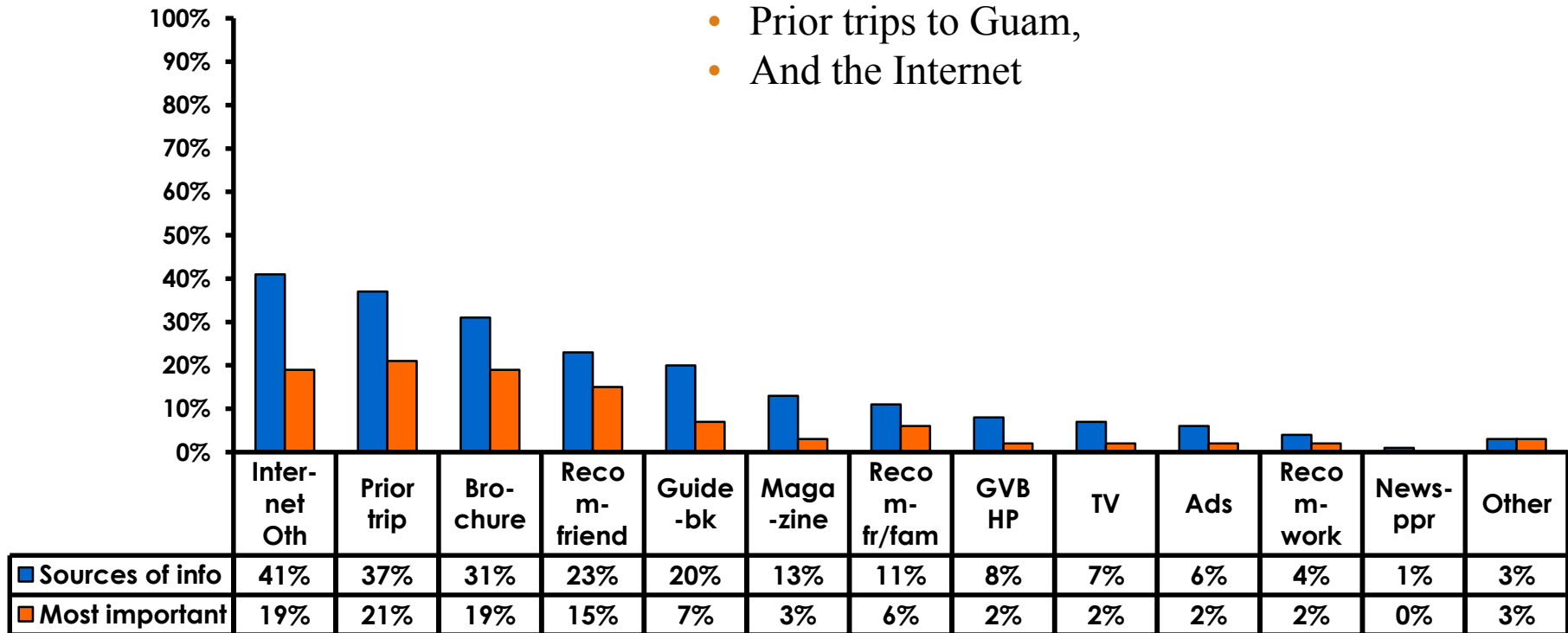
# Post-Arrival Sources – Top 3 Most Important

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015
<b>Tour staff</b>	46%	42%	44%	47%	44%	46%	40%	33%	31%	<b>27%</b>
<b>Hotel staff</b>	13%	16%	15%	17%	22%	22%	21%	25%	25%	<b>22%</b>
<b>Internet</b>								11%	18%	<b>28%</b>
<b>Signage</b>	6%	Not top 3	Not top 3	6%	7%	Not top 3	6%	Not top 3	Not top 3	<b>Not top 3</b>
<b>Vis Ch.</b>	Not top 3	9%	10%	6%	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	<b>Not top 3</b>
<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	<b>Not top 3</b>

# Sources of Information - Motivation

The primary motivational sources of information were.

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



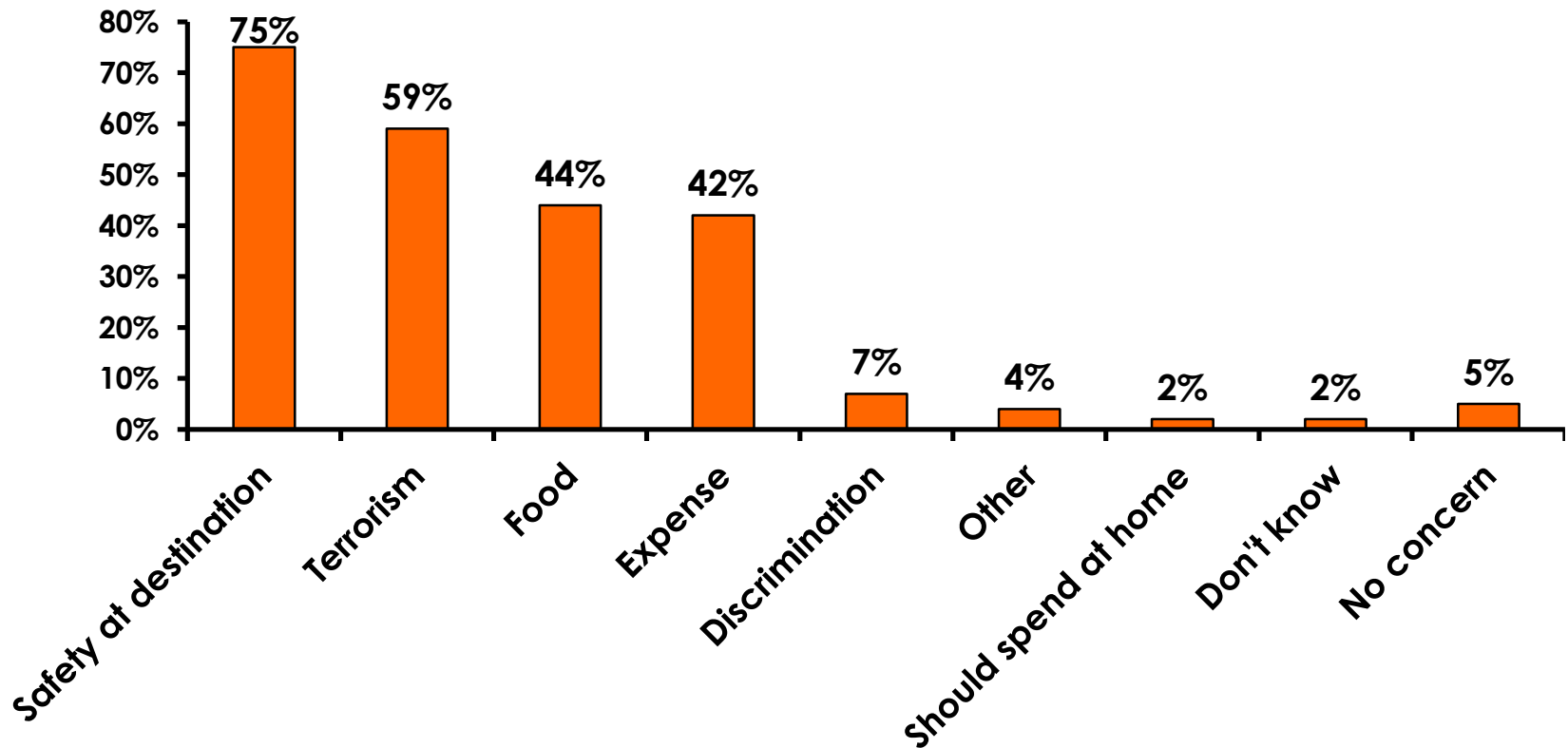
# Sources of Information – Motivation – Most Important

	<b>FY2013</b>	<b>FY2014</b>	<b>FY2015</b>
<b>Prior Trip</b>	18%	21%	<b>21%</b>
<b>Travel agent brochure</b>	22%	19%	<b>19%</b>
<b>Internet- Other Guam</b>	15%	16%	<b>19%</b>



# SECTION 6 **OTHER ISSUES**

# Concerns about travel outside of Japan - Overall



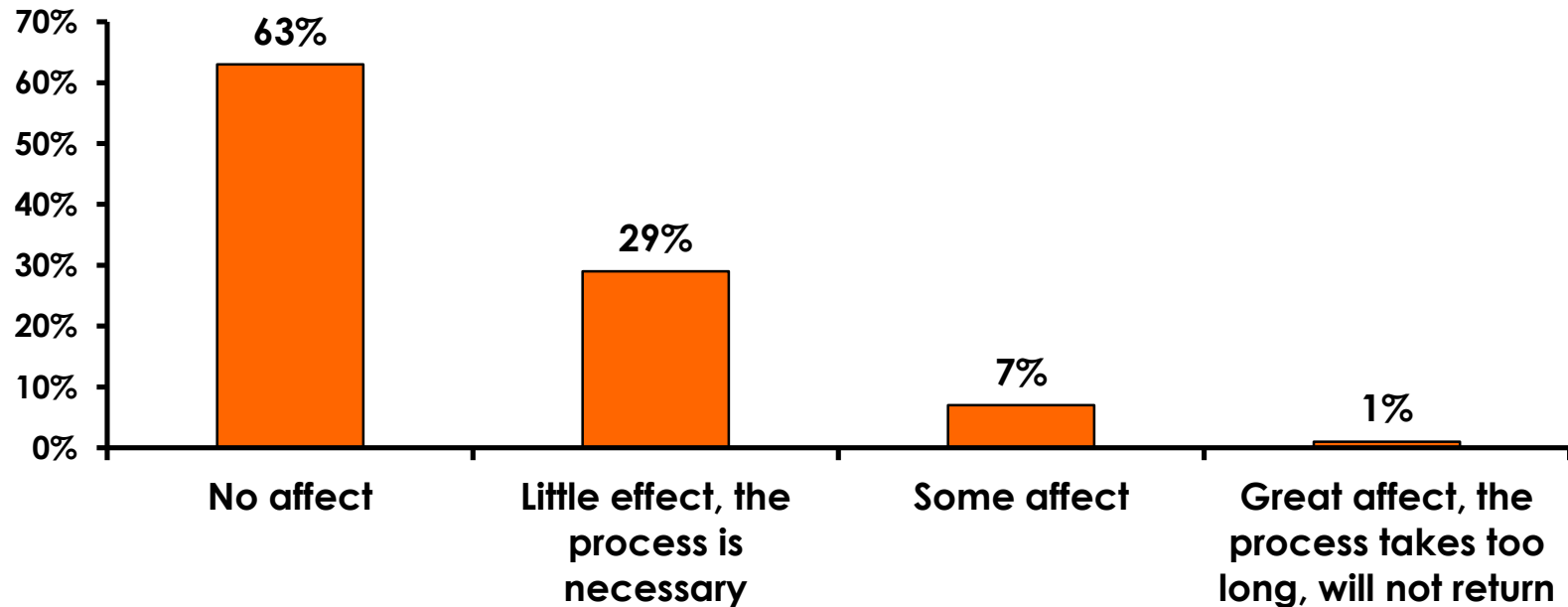
# Concerns about travel outside of Japan

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015
Safety	81%	79%	81%	83%	80%	78%	83%	75%	76%	75%
Terrorism	73%	70%	60%	59%	56%	56%	47%	48%	50%	59%
Food	35%	35%	42%	41%	35%	35%	41%	41%	44%	44%
Expense	46%	45%	49%	50%	45%	44%	47%	38%	41%	42%
Discrimination	-	-	-	-	-	3%	10%	10%	7%	7%
Should spend @home	2%	2%	2%	2%	2%	3%	2%	3%	2%	2%
Other	4%	4%	4%	6%	4%	4%	4%	4%	4%	4%
DK	2%	2%	3%	2%	3%	3%	3%	3%	2%	2%
No Concern	2%	2%	2%	2%	3%	3%	3%	6%	6%	5%

# 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%	77%	76%	75%	73%	75%	75%	77%	77%	80%	75%	74%	
	Terrorism	59%	56%	60%	61%	65%	54%	57%	64%	64%	62%	60%	57%	61%	
	Food	44%	44%	45%	42%	45%	40%	42%	45%	47%	46%	42%	46%	50%	
	Expense	42%	46%	43%	40%	35%	43%	44%	46%	44%	43%	43%	40%	50%	
	Discrimination against Japanese	7%	8%	8%	7%	5%	7%	9%	9%	7%	7%	8%	7%	13%	
	No concerns	5%	5%	5%	6%	7%	6%	7%	5%	6%	4%	4%	6%	4%	
	Other	4%	4%	5%	5%	4%	4%	3%	4%	6%	5%	5%	4%	4%	
	Should spend at home	2%	2%	3%	1%	3%	3%	3%	3%	2%	1%	2%	2%	3%	
	Don't know	2%	3%	2%	1%	2%	3%	2%	2%	1%	1%	1%	1%	1%	
	Total	Count	4146	1256	1318	1132	420	201	415	503	523	695	558	634	94

# Security Screening/ Immigration Process at Guam International Airport



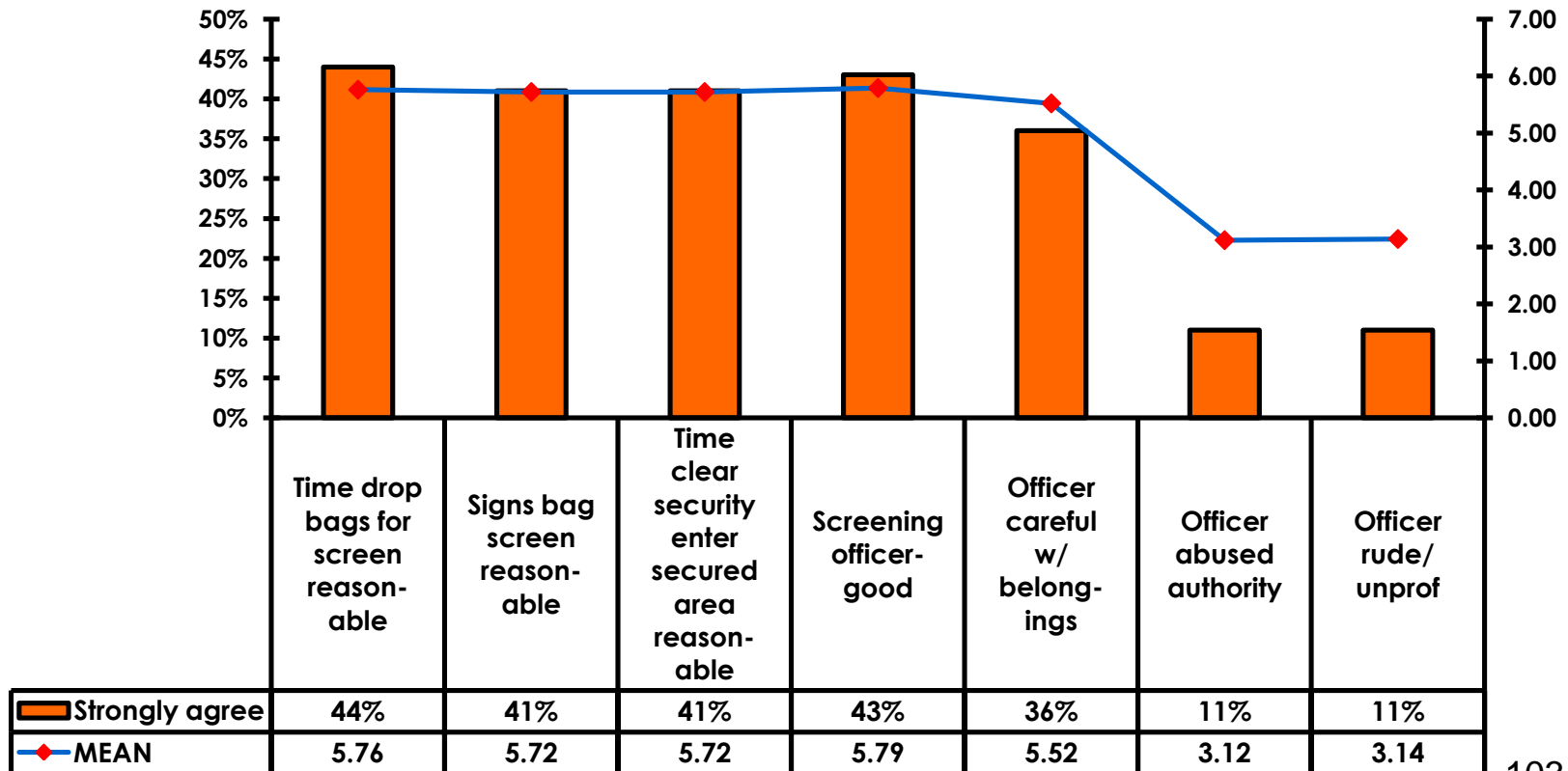
# Security Screening/ Immigration Process at Guam International Airport

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015
<b>No effect</b>	43%	43%	50%	50%	46%	48%	50%	60%	61%	<b>63%</b>
<b>Little effect</b>	43%	41%	38%	36%	39%	41%	37%	29%	28%	<b>29%</b>
<b>Some effect</b>	12%	13%	11%	12%	13%	10%	11%	10%	10%	<b>7%</b>
<b>Great effect</b>	2%	2%	2%	2%	2%	1%	2%	1%	1%	<b>1%</b>

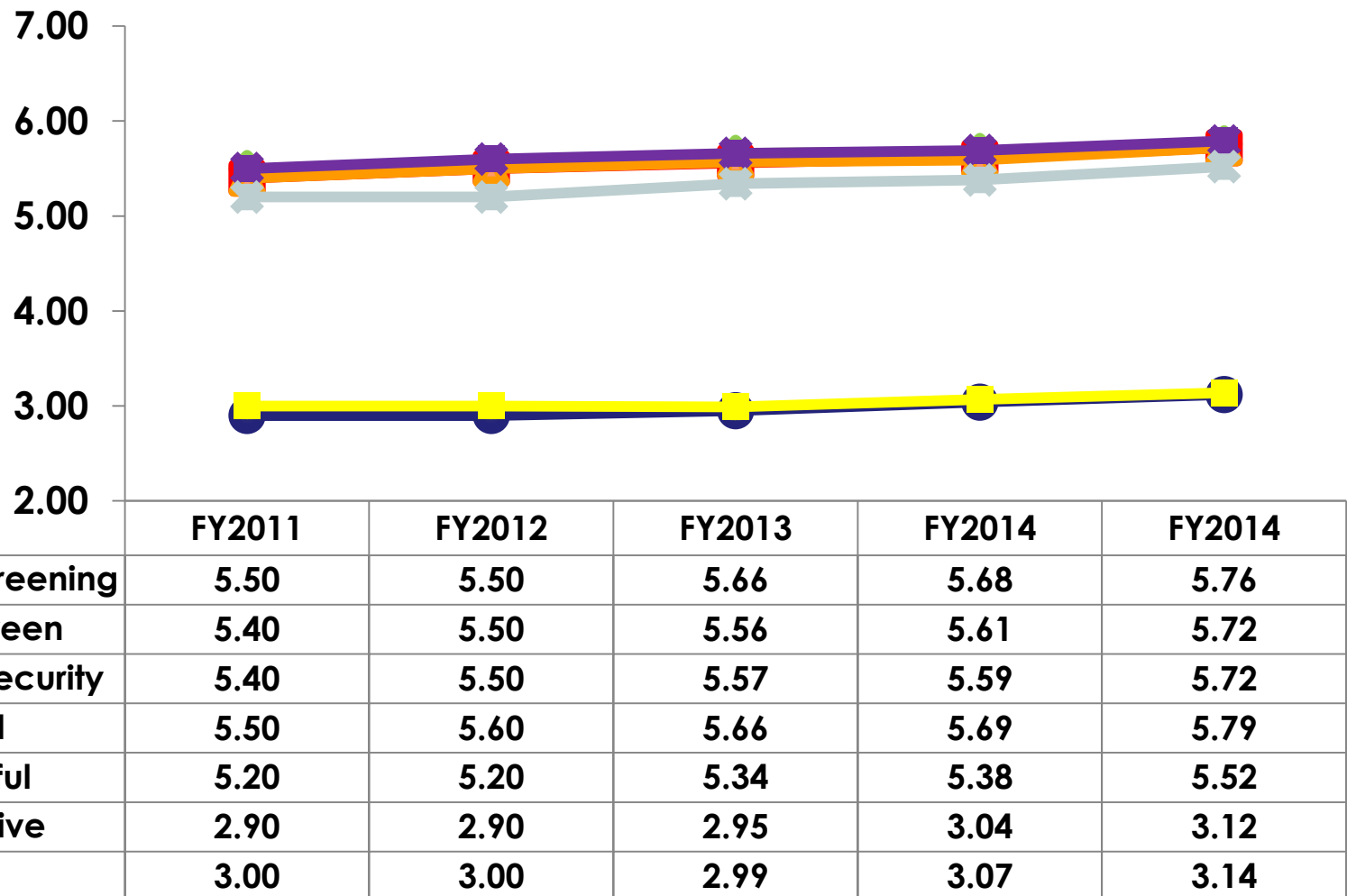
# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



# Airport Screening





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# SHOP GUAM FESTIVAL AWARENESS

	FY2014	FY2015
Aided Awareness	2%	1%
No awareness	98%	99%

# SHOP GUAM FESTIVAL – IMPACT

	FY2014	FY2015
Increased	51%	20%
Decreased	2%	8%
No change	46%	72%