



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015

JULY 2015



Prepared by: QMark Research

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Background & Methodology

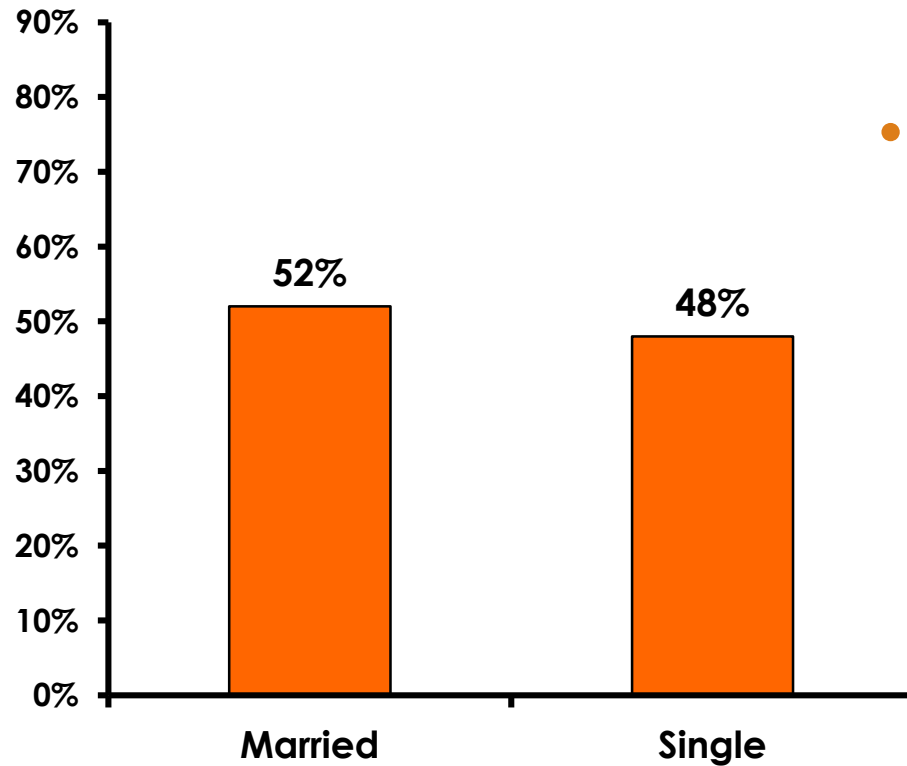
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **352** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.23 percentage points.

OBJECTIVES

- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

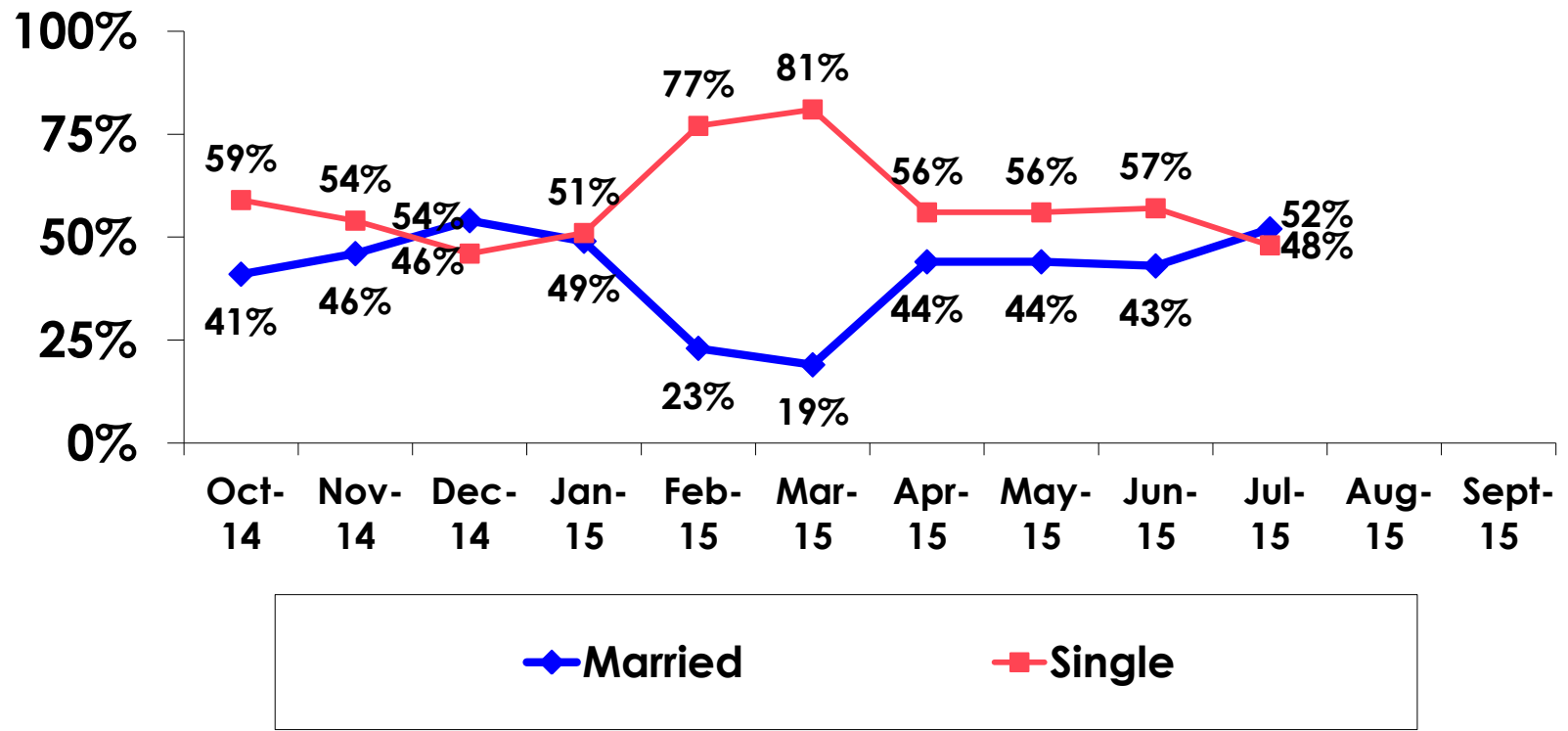
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

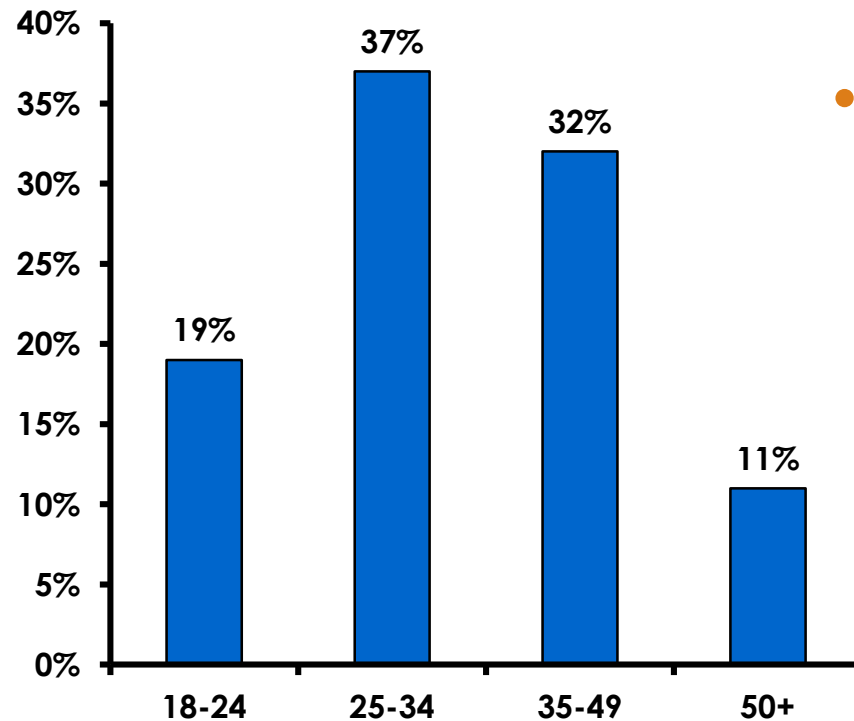


- 72% of male visitors are married.

MARITAL STATUS

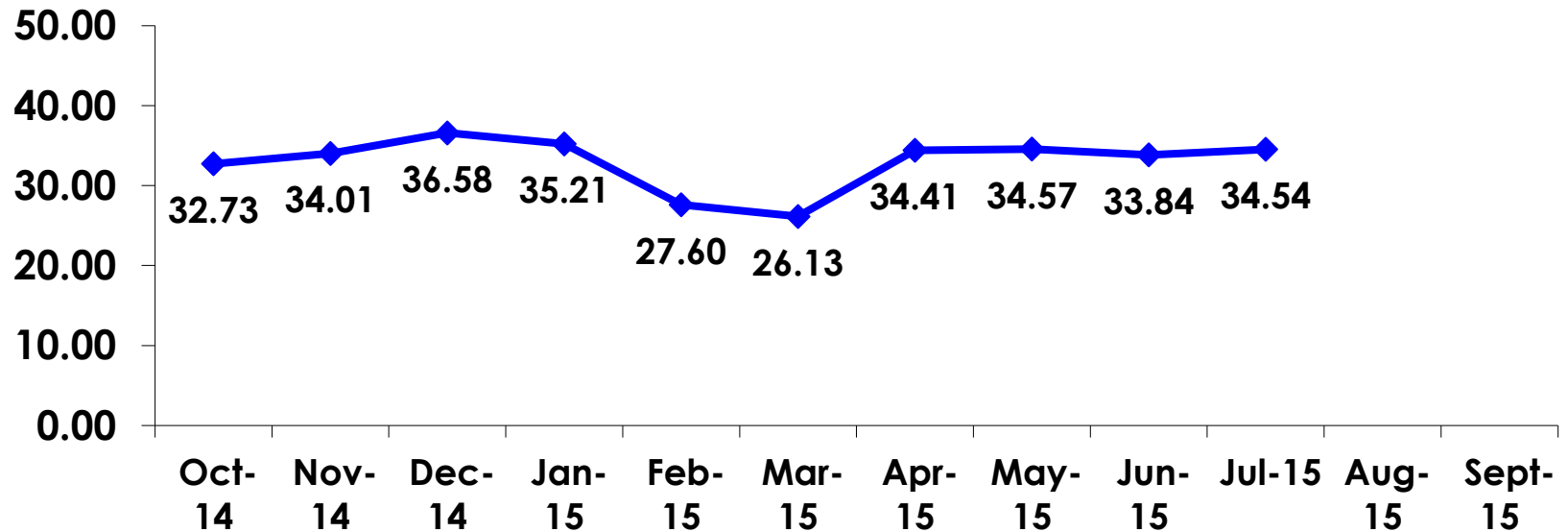


Age - Overall

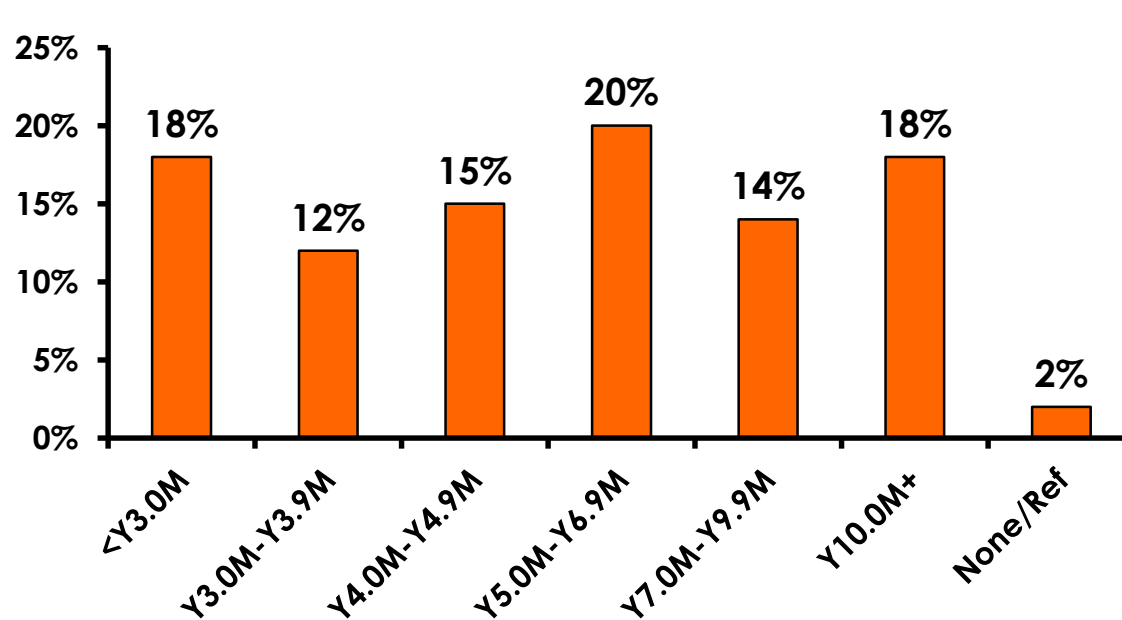


- The average age of the respondents is 34.54 years of age.

AVERAGE - AGE

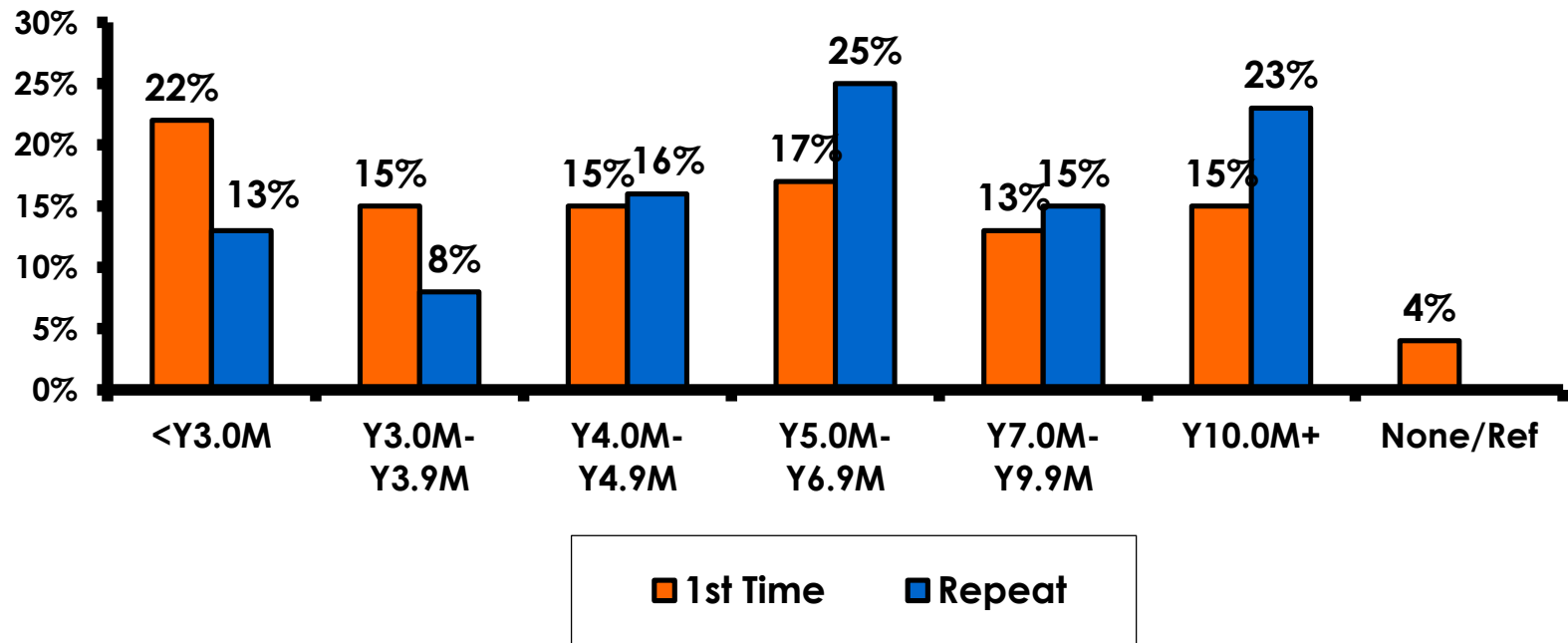


Personal Income



• ¥123.16=\$1

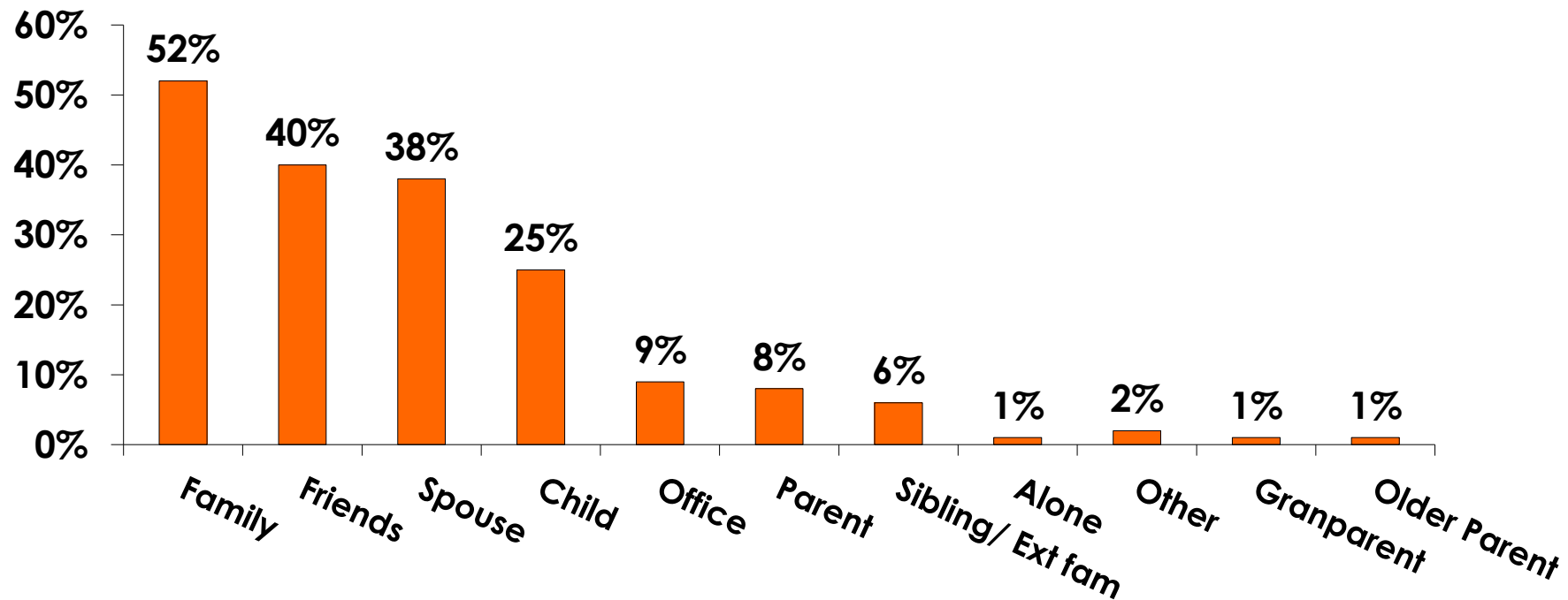
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	13	4	9	5	3	2	2
		Column N %	4%	2%	6%	8%	2%	2%	5%
	Y2.0M-Y3.0M	Count	46	11	35	13	22	7	4
		Column N %	14%	6%	22%	20%	18%	7%	10%
	Y3.0M-Y4.0M	Count	40	15	25	14	20	5	1
		Column N %	12%	9%	16%	22%	16%	5%	3%
	Y4.0M-Y5.0M	Count	51	30	21	8	25	17	1
		Column N %	15%	17%	13%	13%	20%	16%	3%
	Y5.0M-Y7.0M	Count	68	43	25	3	24	31	10
		Column N %	20%	25%	16%	5%	20%	29%	26%
	Y7.0M-Y10.0M	Count	47	30	16	5	13	20	9
		Column N %	14%	17%	10%	8%	11%	19%	23%
	Y10.0M+	Count	61	39	22	12	12	25	12
		Column N %	18%	22%	14%	19%	10%	23%	31%
	No Income	Count	7	2	5	4	3		
		Column N %	2%	1%	3%	6%	2%		
	Total	Count	333	174	158	64	122	107	39

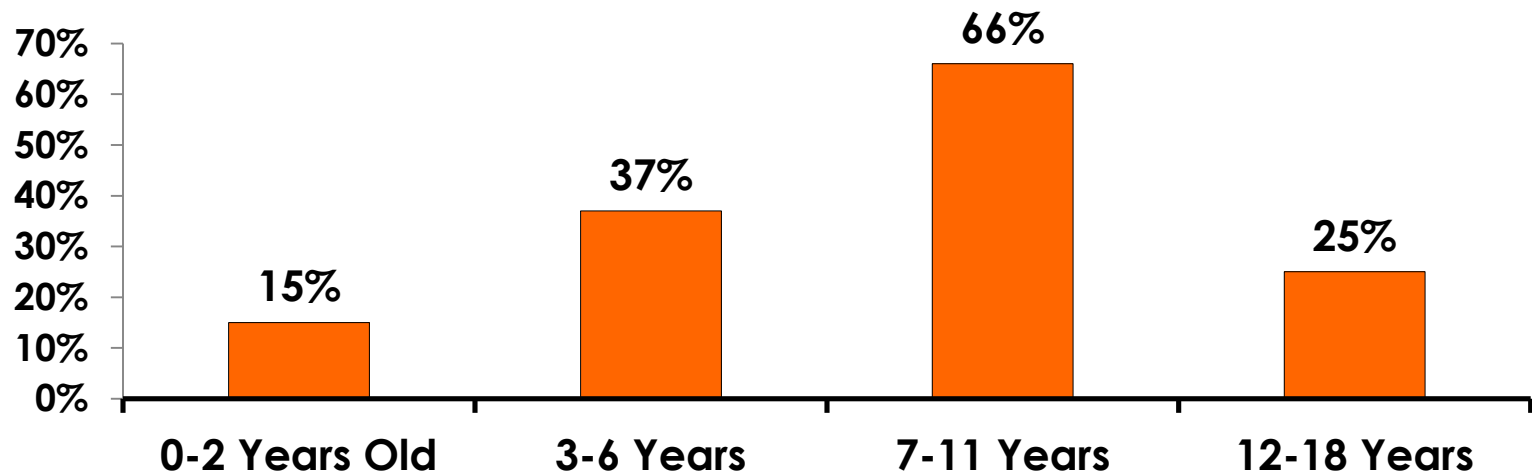
Travel Companions



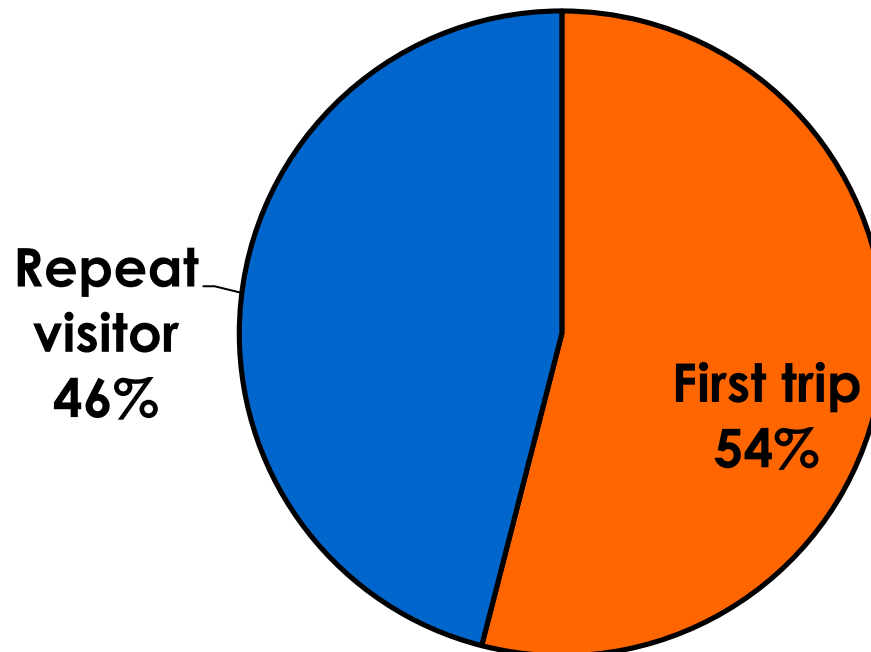
Number of Children Travel Party

N=87 total respondents traveling with children.

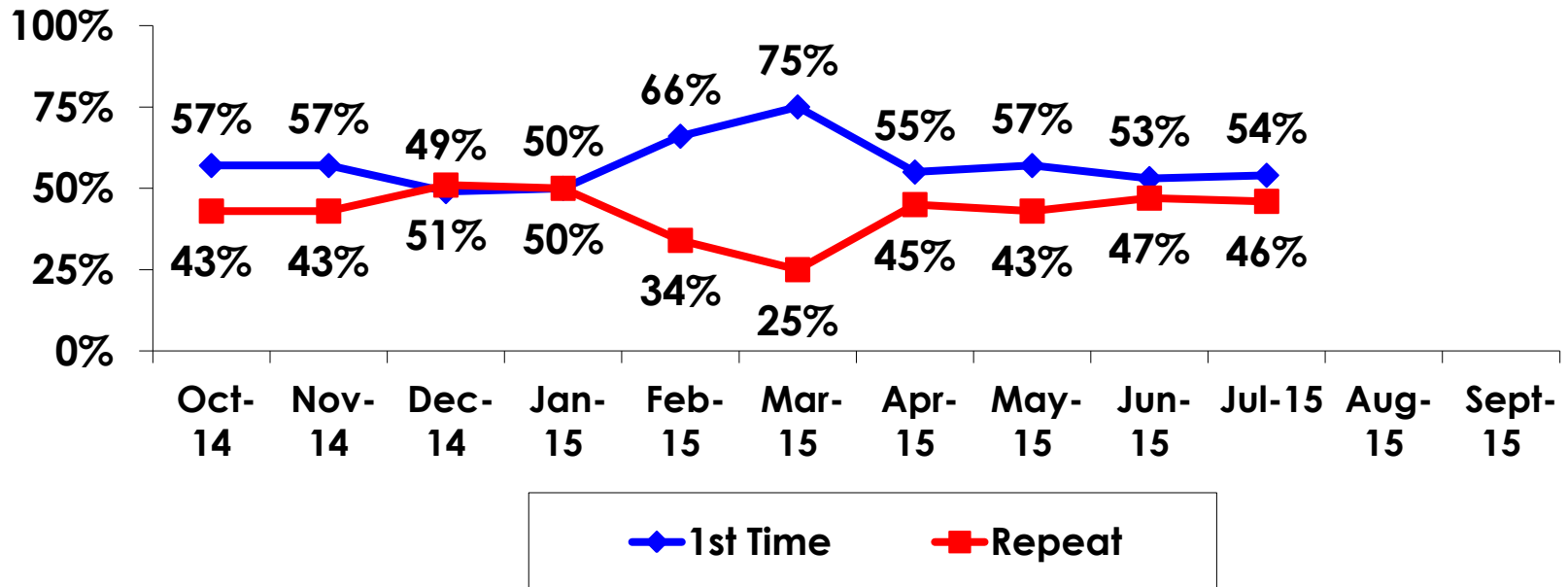
(Of those N=87 respondents, there is a total of 141 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



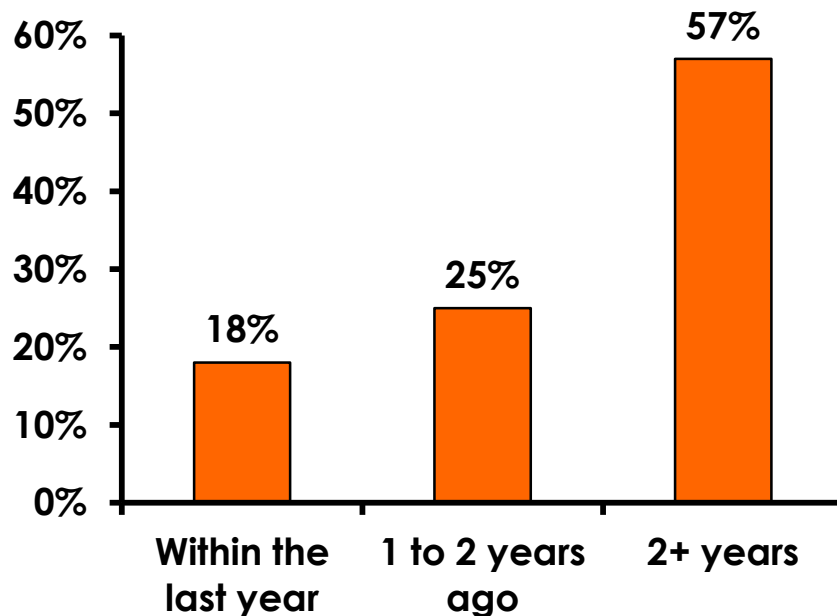
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	181	99	82	
		Column N %	52%	52%	51%	
	Female	Count	170	92	78	
		Column N %	48%	48%	49%	
	Total	Count	351	191	160	
AGE	18-24	Count	66	47	19	
		Column N %	19%	25%	12%	
	25-34	Count	131	80	51	
		Column N %	37%	42%	32%	
	35-49	Count	114	44	70	
		Column N %	32%	23%	43%	
	50+	Count	40	19	21	
		Column N %	11%	10%	13%	
		Total	Count	351	190	161

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

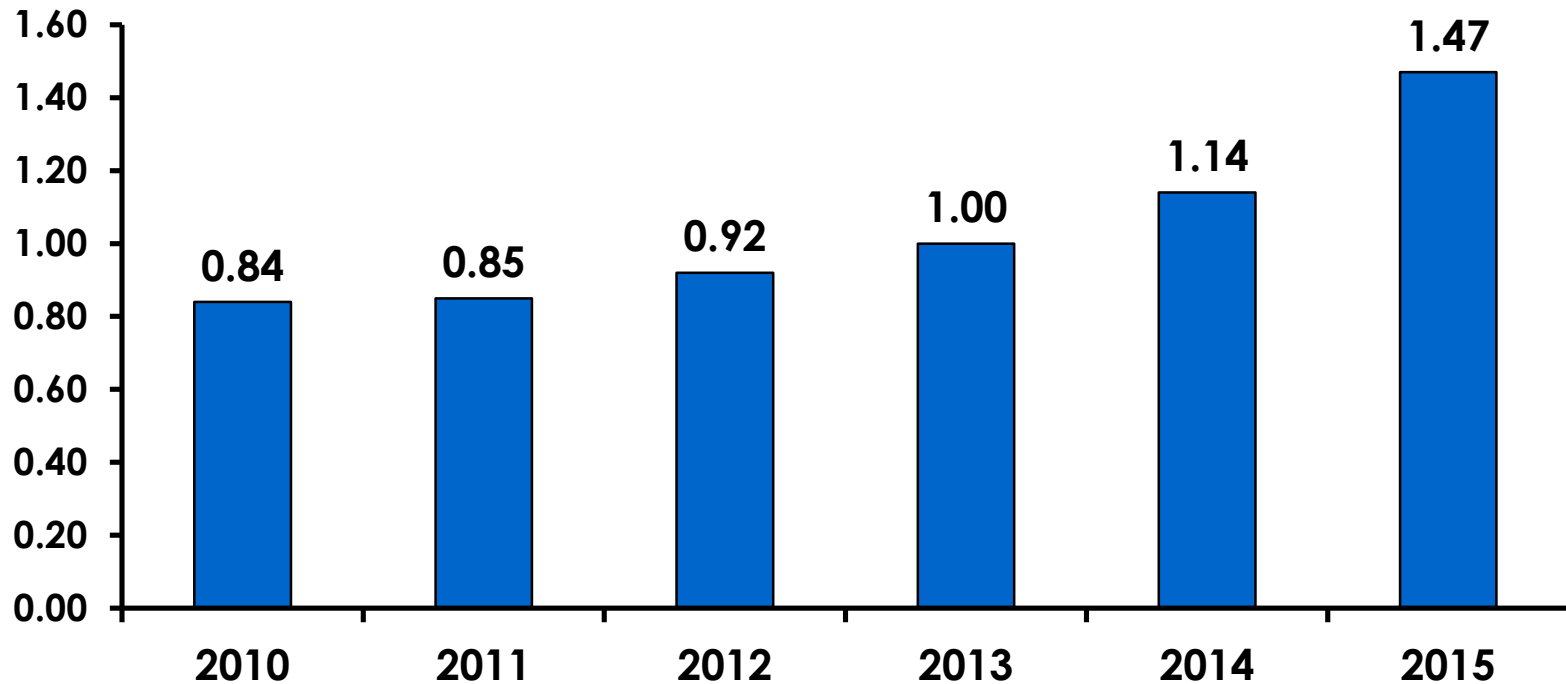
Repeat Visitors Last Trip

n = 157



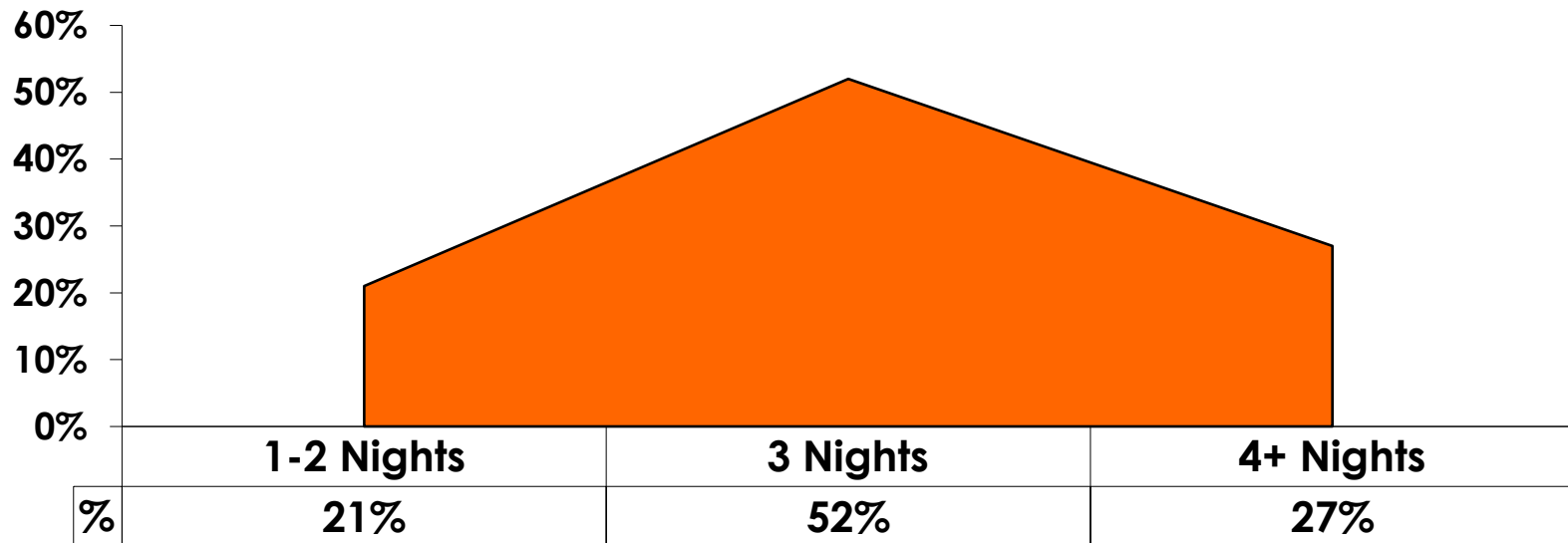
- The average repeat visitor has been to Guam 3.08 times.
- Nearly half of repeat visitors have been to Guam within the last 2 years.

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

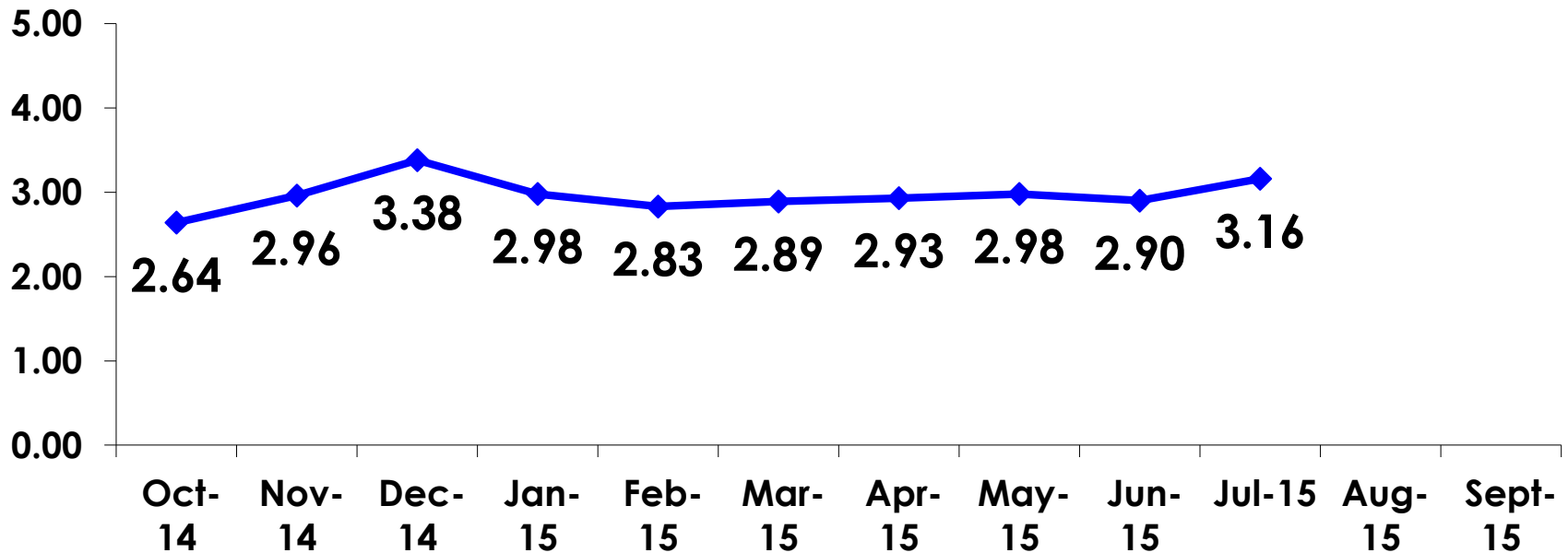


Length of Stay

Mean = 3.16 Days
Median = 3.0 Days



AVG LENGTH OF STAY

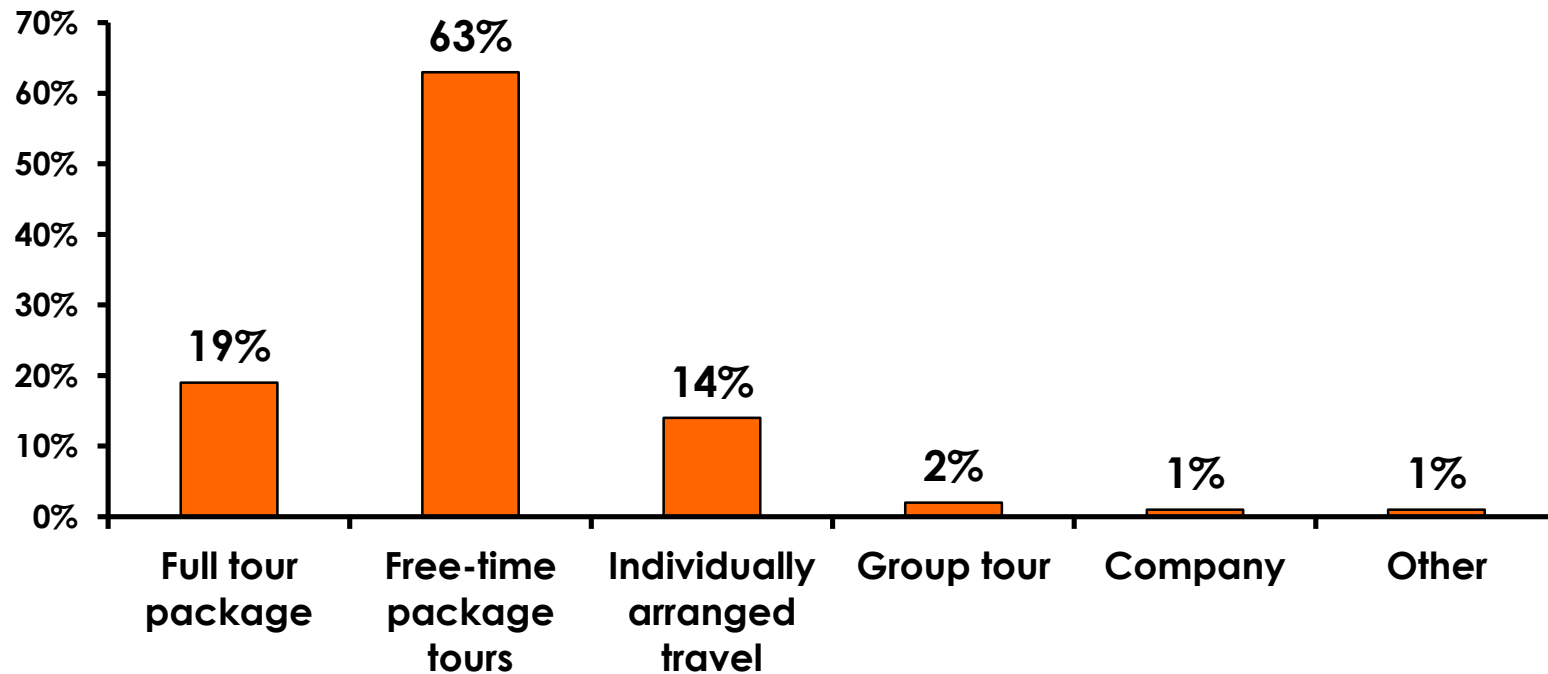


Occupation by Income

	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	21%	23%	39%	25%	14%	12%	23%	18%		
Engineer	20%	15%	13%	25%	33%	24%	13%	20%		
Salesperson	12%	15%	9%	20%	16%	18%	6%	3%		
Homemaker	9%	8%	4%	3%	6%	13%	15%	8%	14%	
Manager	7%				2%	7%	11%	20%		
Self-employed	5%	8%	2%		4%	1%	11%	10%		
Professional/ Specialist	4%		2%	5%	6%	7%	4%	3%		
Skilled worker	4%	8%	11%	3%	4%	6%				
Govt- office worker non-mgr	4%		4%	8%	2%	6%	6%			
Freeter	3%	23%	4%	8%	2%	1%	2%			
Other	3%		7%	3%	4%		4%	3%		
Student	3%							5%	57%	
Govt- Manager	2%		2%		4%	3%	2%	3%		
Executive (30+ employees)	2%			3%	2%		2%	5%		
Unemployed	1%								29%	
Retired	1%		2%							
Govt- Executive	0%					1%				
Total Count	346	13	46	40	49	68	47	60	7	

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

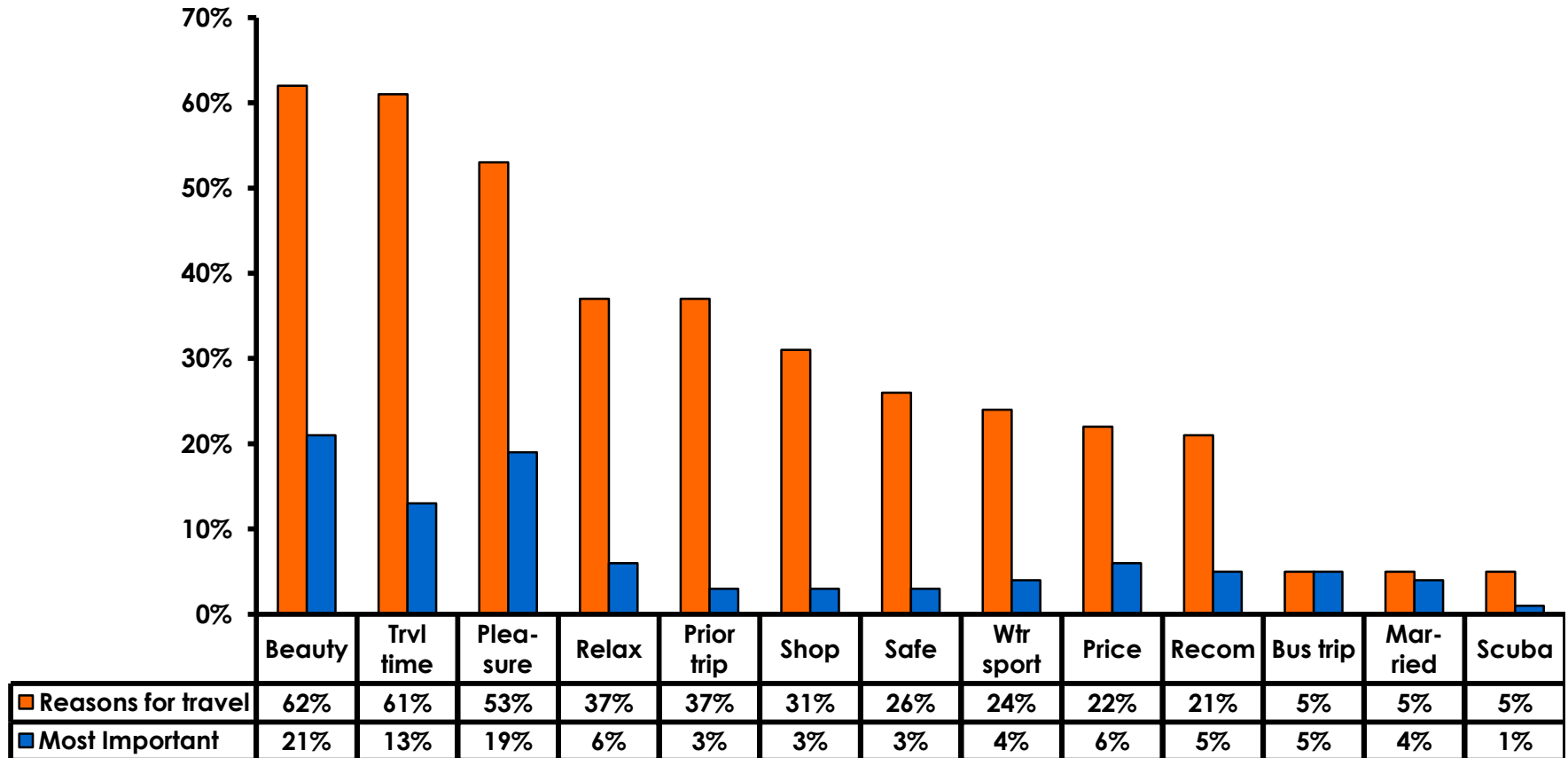


Accommodation by Income

Average length of stay: 3.16 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	15%	15%	24%	15%	18%	18%	13%	7%	29%	
	Outrigger Guam Resort	14%	38%	11%	15%	6%	16%	11%	15%		
	Grand Plaza Hotel	9%	8%	4%	18%	12%	6%	4%	7%	29%	
	PIC Club	9%	8%	9%	8%	14%	7%	6%	7%		
	Hotel Nikko Guam	6%		2%	5%	8%	7%	6%	11%		
	Holiday Resort Guam	6%	15%	7%	15%	4%	4%	6%	2%		
	Fiesta Resort Guam	5%		7%	3%	8%	4%	4%	8%	14%	
	Onward Beach Resort	5%		7%			6%	9%	10%	14%	
	Guam Reef & Olive Spa	5%	8%	7%		4%	7%	9%	5%		
	Hyatt Regency Guam	5%		2%		6%	3%	6%	10%	14%	
	Hilton Guam Resort	4%		2%		4%	3%	6%	8%		
	Sheraton Laguna Guam	3%		2%		2%	6%	9%	2%		
	Leo Palace Resort	3%	8%	2%	3%	2%	1%	4%	3%		
	Westin Resort Guam	3%		2%	10%	2%	3%	2%			
	Other	1%			3%	2%	3%		2%		
	Pacific Bay Hotel	1%		4%		2%					
	Oceanview Hotel	1%				4%	1%		2%		
	Pacific Star Resort & Spa	1%			3%	2%			2%		
	Condo	1%			3%		1%	2%			
	Lotte Hotel Guam	1%		2%		2%	1%				
	Verona Resort & Spa	1%		4%							
	Royal Orchid Guam	0%							2%		
	Bayview Hotel	0%						2%			
	Total	Count	350	13	45	39	51	68	47	61	7

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

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

were the primary reasons for visiting during this period.

Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty	62%	77%	56%	61%	57%	62%	61%	
	Short travel time	61%	55%	64%	59%	70%	62%	61%	
	Pleasure	53%	53%	55%	51%	55%	50%	56%	
	Relax	37%	27%	38%	35%	55%	35%	39%	
	Previous trip	37%	23%	27%	55%	40%	38%	35%	
	Shopping	31%	38%	38%	22%	23%	25%	36%	
	Safe	26%	26%	20%	32%	30%	25%	27%	
	Water sports	24%	30%	27%	24%	10%	23%	26%	
	Price	22%	21%	21%	25%	18%	22%	22%	
	Recomm- friend/family/trvl agnt	21%	36%	21%	13%	20%	15%	28%	
	Company/ Business Trip	5%	8%	5%	7%		2%	9%	
	Married/ Attn wedding	5%	2%	6%	5%	8%	7%	3%	
	Scuba	5%	9%	6%	3%	3%	4%	6%	
	Honeymoon	4%	5%	6%	2%		6%	1%	
	Other	3%	2%	2%	4%	8%	3%	4%	
	Golf	3%	2%	2%	3%	8%	3%	2%	
	Organized sports	2%	5%	1%	3%	3%	3%	2%	
	Visit friends/ Relatives	2%	2%	2%	2%	3%	1%	3%	
	Company Sponsored	1%		1%	2%		1%	1%	
	Career Cert/ Testing	1%	2%			3%	1%	1%	
	Convention/ Trade/ Conference	0%		1%				1%	
	Total	Count	352	66	131	114	40	181	170

Motivation by Income

		TOTAL	Q26								
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q5A	Natural beauty	62%	54%	63%	68%	65%	57%	49%	70%	71%	
	Short travel time	61%	62%	54%	60%	78%	59%	57%	66%	43%	
	Pleasure	53%	62%	61%	70%	55%	46%	38%	52%	71%	
	Relax	37%	23%	35%	53%	41%	38%	26%	41%	29%	
	Previous trip	37%	15%	28%	23%	37%	44%	45%	49%		
	Shopping	31%	23%	39%	50%	41%	22%	26%	28%		
	Safe	26%	15%	24%	20%	37%	19%	28%	30%	43%	
	Water sports	24%	8%	26%	35%	35%	13%	26%	21%	43%	
	Price	22%	23%	13%	30%	27%	10%	23%	28%	43%	
	Recomm- friend/family/trvl agnt	21%	23%	30%	23%	20%	21%	23%	13%	29%	
	Company/ Business Trip	5%	8%	11%	5%	2%	4%	6%	5%		
	Married/ Attn wedding	5%		2%	8%	2%	9%	9%	3%	14%	
	Scuba	5%	8%	7%	8%	6%	3%	4%	3%		
	Honeymoon	4%		2%	5%	10%	4%		2%		
	Other	3%		2%	3%	4%		4%	8%		
	Golf	3%		7%		2%	1%	4%	3%		
	Organized sports	2%			5%	2%		6%	3%		
	Visit friends/ Relatives	2%			5%		1%	4%	2%		
	Company Sponsored	1%					1%	2%	2%		
	Career Cert/ Testing	1%							3%		
	Convention/ Trade/ Conference	0%									
	Total	Count	352	13	46	40	51	68	47	61	7

SECTION 3 **EXPENDITURES**

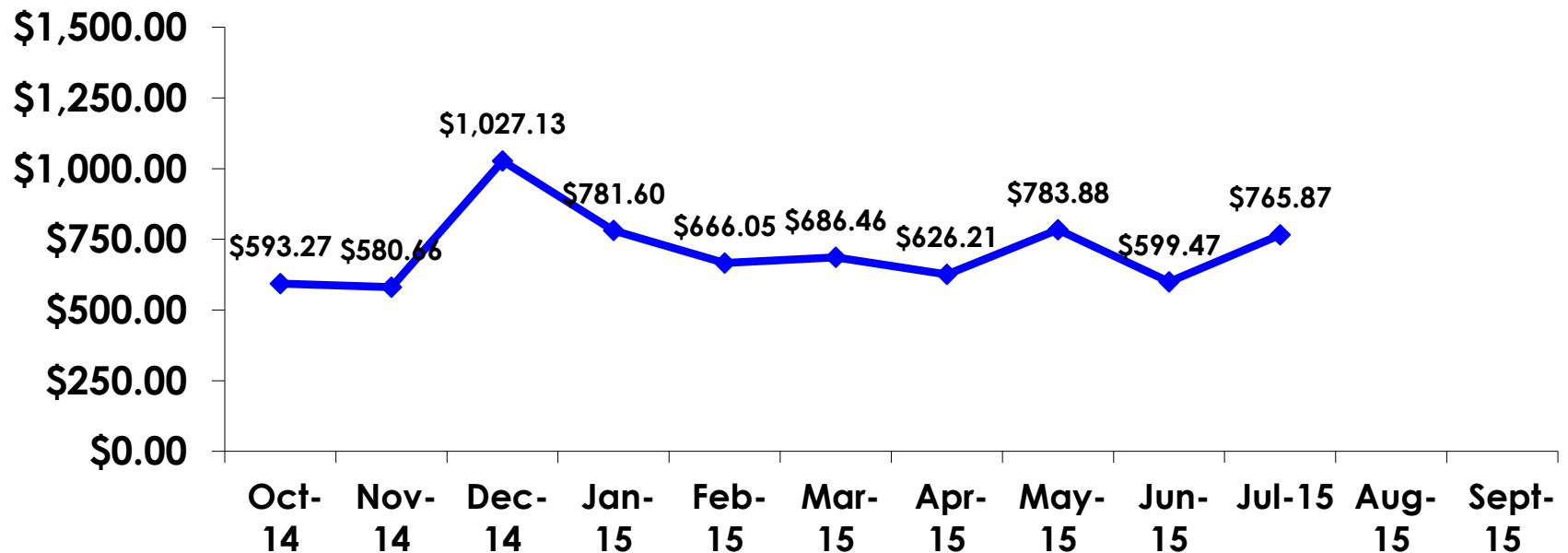
Prepaid Expenditures

¥123.16/US\$1

- \$1,759.52 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$20,299 = maximum (highest amount recorded for the entire sample)
- \$765.87 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$711.10

Breakdown of Prepaid Expenditures

¥123.16=\$1

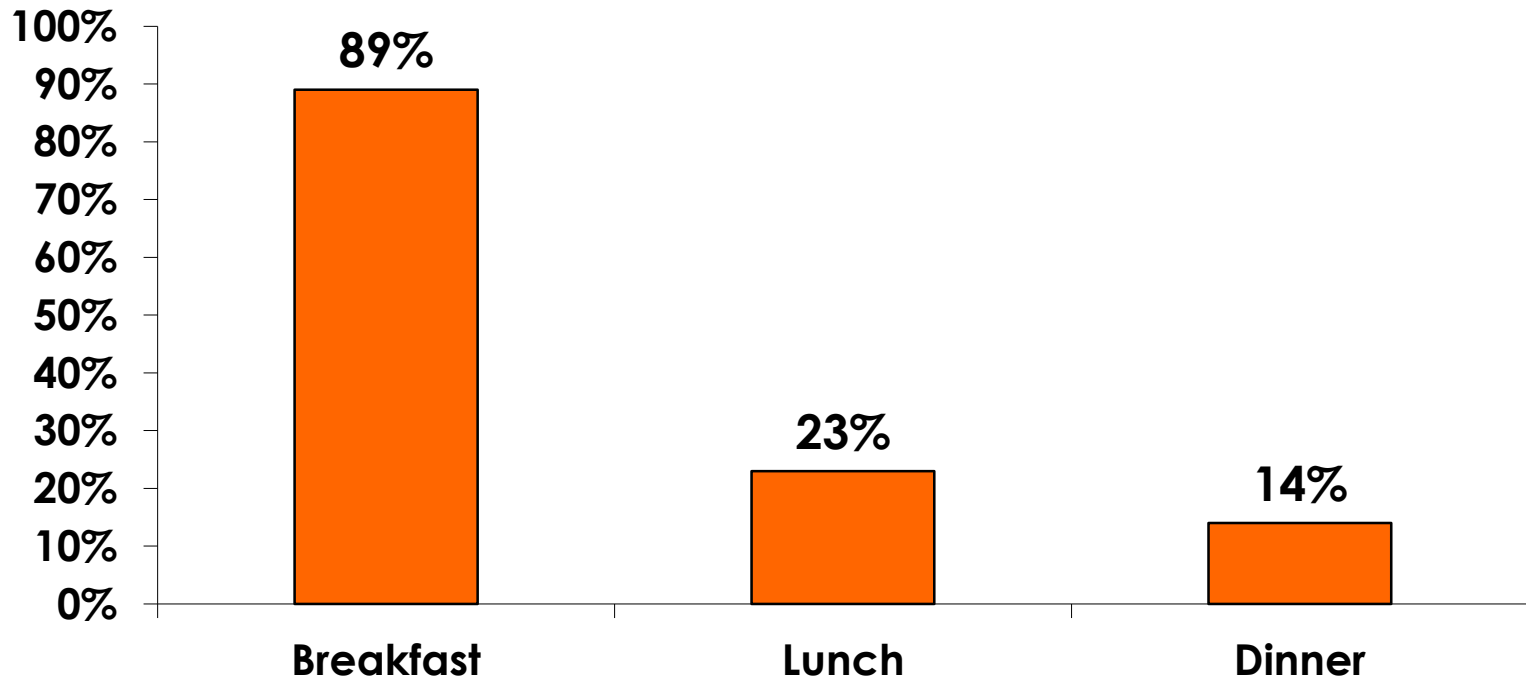
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,697.40
Air & Accommodation w/ daily meal package	\$2,819.18
Air only	\$1,407.37
Accommodation only	\$627.54
Accommodation w/ daily meal only	\$1,461.51
Food & Beverages in Hotel	\$-
Ground transportation – Japan	\$60.67
Ground transportation – Guam	\$-
Optional tours/ activities	\$288.06
Other expenses	\$644.18
Total Prepaid	\$1,759.52

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=35

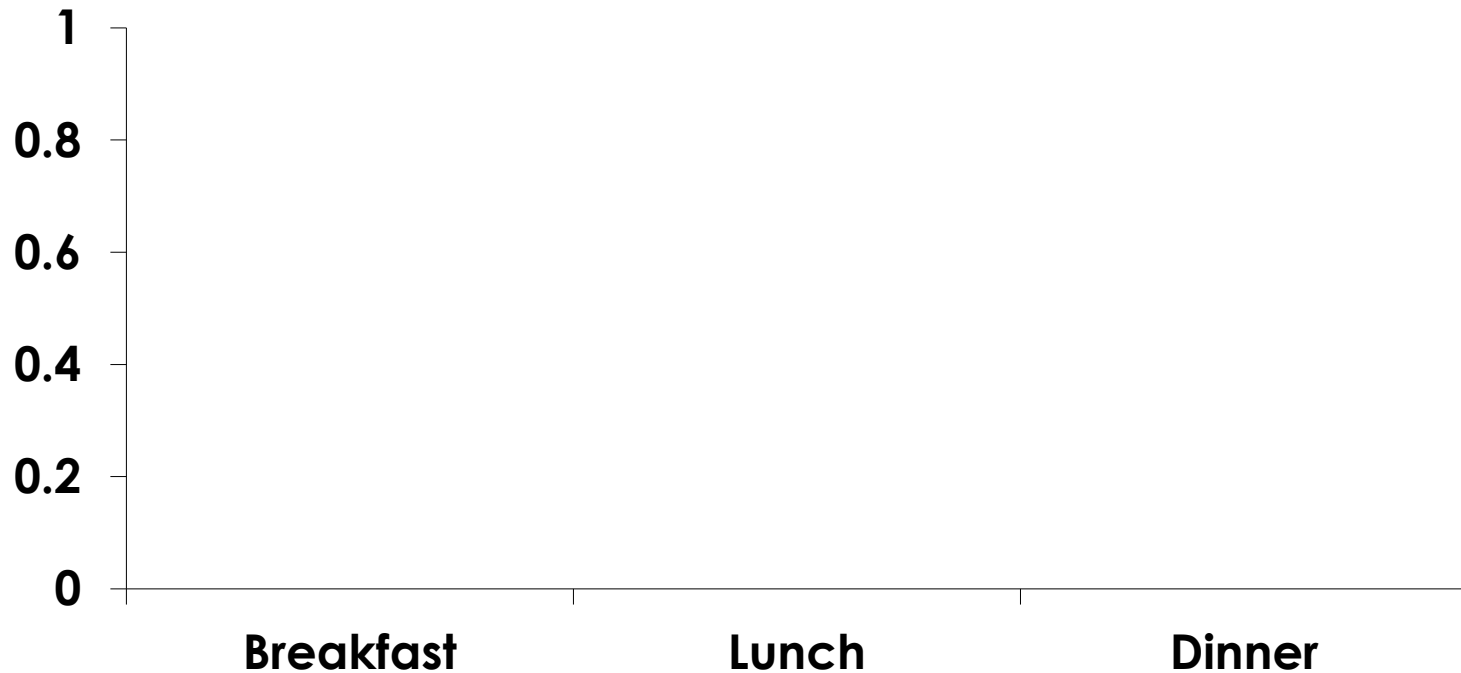


Mean=2,819.18 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

n= (none recorded)



Mean=\$1,461.51 per travel party

PREPAID GROUND TRANSPORTATION

n=x



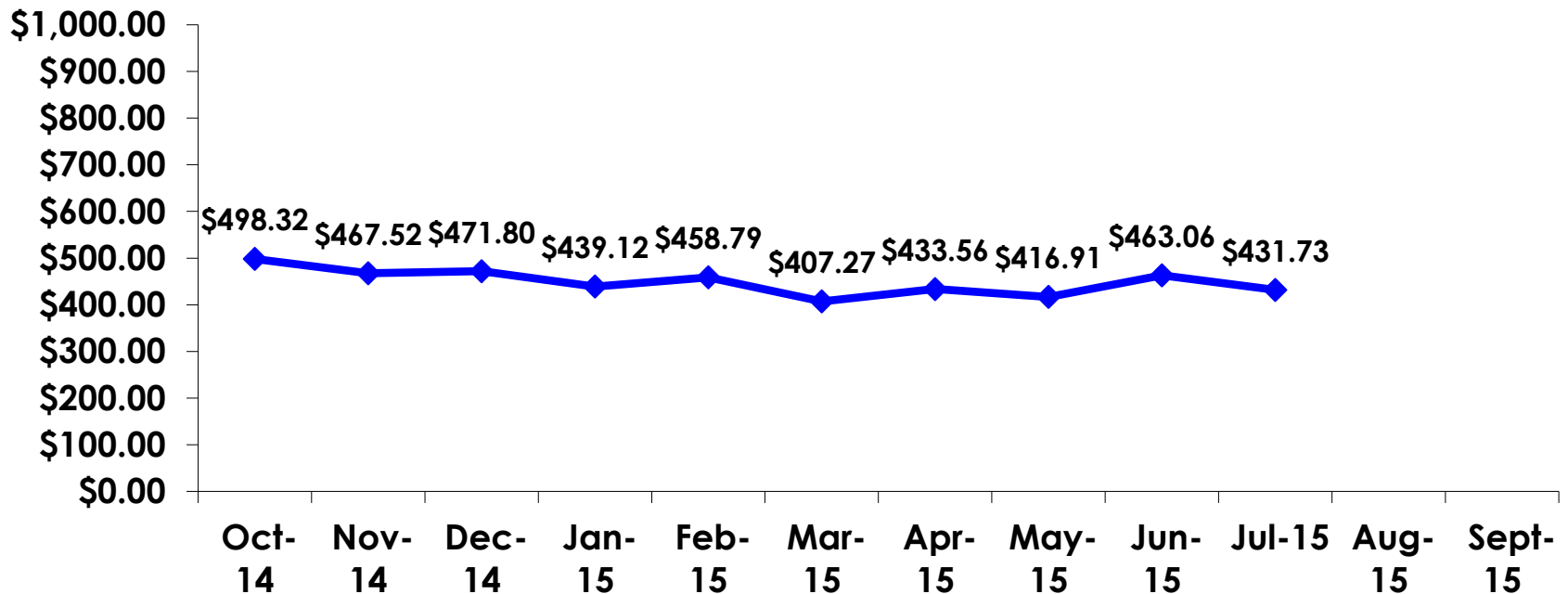
Mean=\$xx.x per travel party

On-Island Expenditures

- \$777.19 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,000 = Maximum (highest amount recorded for the entire sample)
- \$431.73 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

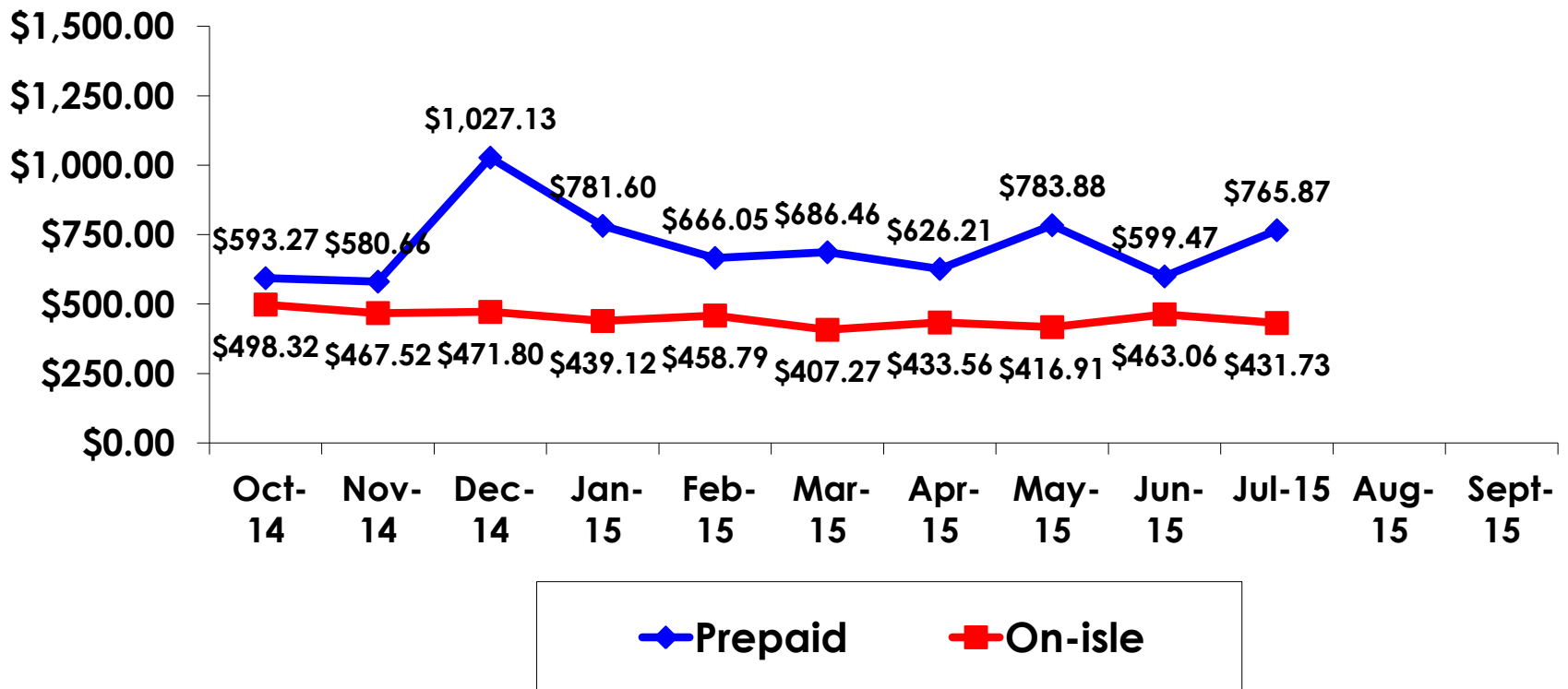


YTD = \$448.76

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$711.10

On-Isle YTD = \$448.76



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	\$431.73	\$394.91	\$472.29	\$482.50	\$400.85	\$327.28	\$500.97	\$383.75	\$501.17	\$540.90	\$444.81
	Median	\$333	\$300	\$368	\$375	\$342	\$250	\$460	\$335	\$400	\$300	\$320
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$67	\$0	\$0	\$0	\$0
	Maximum	\$5,000	\$2,000	\$5,000	\$1,500	\$2,000	\$1,290	\$1,500	\$1,370	\$2,000	\$5,000	\$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	\$55.45	\$67.17	\$43.31	\$17.35	\$21.39	\$83.01	\$152.73
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$21
F&B FF/STORE	Mean	\$36.63	\$45.73	\$27.04	\$34.98	\$34.31	\$39.94	\$37.70
	Median	\$0	\$20	\$0	\$0	\$5	\$15	\$10
F&B RESTRNT	Mean	\$95.86	\$127.28	\$60.32	\$72.17	\$74.77	\$106.13	\$172.10
	Median	\$20	\$60	\$0	\$0	\$30	\$0	\$75
OPT TOUR	Mean	\$76.95	\$94.57	\$58.64	\$55.48	\$82.85	\$78.06	\$91.80
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$133.55	\$161.92	\$102.36	\$108.18	\$132.40	\$148.14	\$115.95
	Median	\$20	\$40	\$8	\$10	\$4	\$50	\$100
GIFT- OTHER	Mean	\$108.09	\$107.07	\$109.65	\$90.83	\$96.08	\$131.90	\$108.25
	Median	\$50	\$50	\$50	\$50	\$50	\$100	\$20
TRANS	Mean	\$29.16	\$40.96	\$16.78	\$17.59	\$16.54	\$47.39	\$37.38
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$235.98	\$226.61	\$247.35	\$97.58	\$190.56	\$316.18	\$387.18
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$54
TOTAL	Mean	\$777.19	\$878.53	\$669.15	\$508.03	\$651.41	\$959.71	\$1,094.95
	Median	\$540	\$610	\$463	\$360	\$500	\$700	\$875

On-Island Expenditures

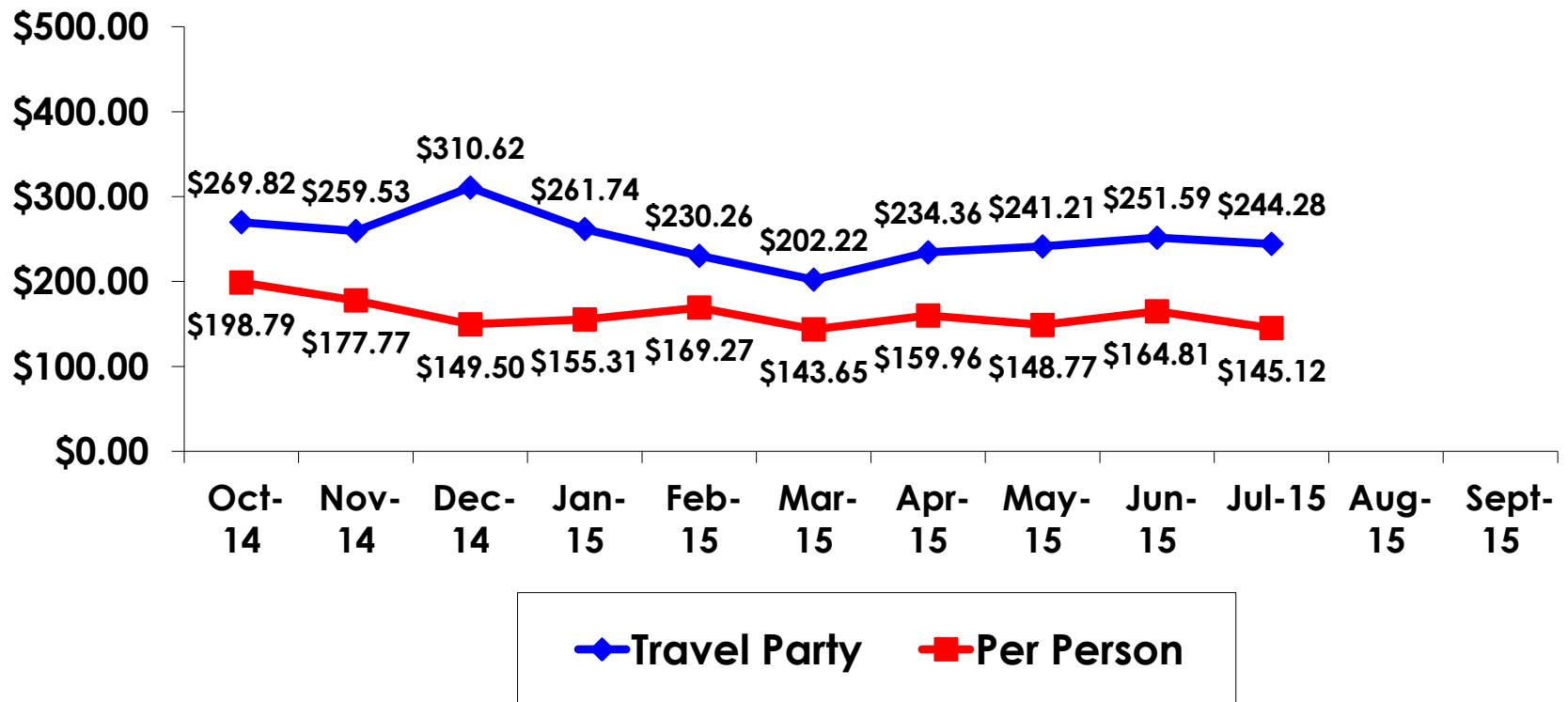
First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$55.45	\$37.52	\$76.73
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$36.63	\$32.19	\$41.91
	Median	\$0	\$0	\$5
F&B RESTRNT	Mean	\$95.86	\$83.73	\$110.24
	Median	\$20	\$0	\$50
OPT TOUR	Mean	\$76.95	\$75.15	\$79.09
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$133.55	\$98.35	\$175.32
	Median	\$20	\$0	\$100
GIFT- OTHER	Mean	\$108.09	\$85.03	\$135.45
	Median	\$50	\$20	\$90
TRANS	Mean	\$29.16	\$35.38	\$21.80
	Median	\$0	\$0	\$0
OTHER	Mean	\$235.98	\$267.10	\$199.06
	Median	\$0	\$0	\$0
TOTAL	Mean	\$777.19	\$723.53	\$840.84
	Median	\$540	\$500	\$600

ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$250.52

Per Person YTD = \$161.26

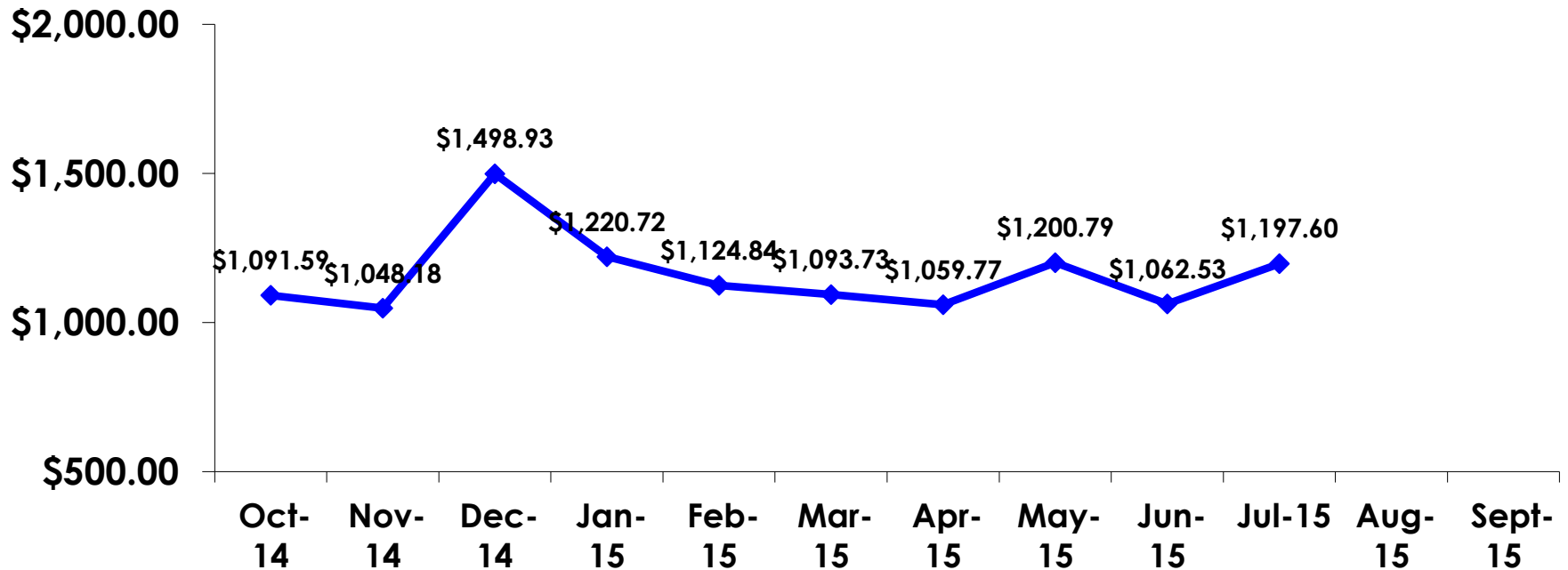


Total Expenditures Per Person (Prepaid & On-Island)

- \$1,197.60 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,868 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES

Per Person



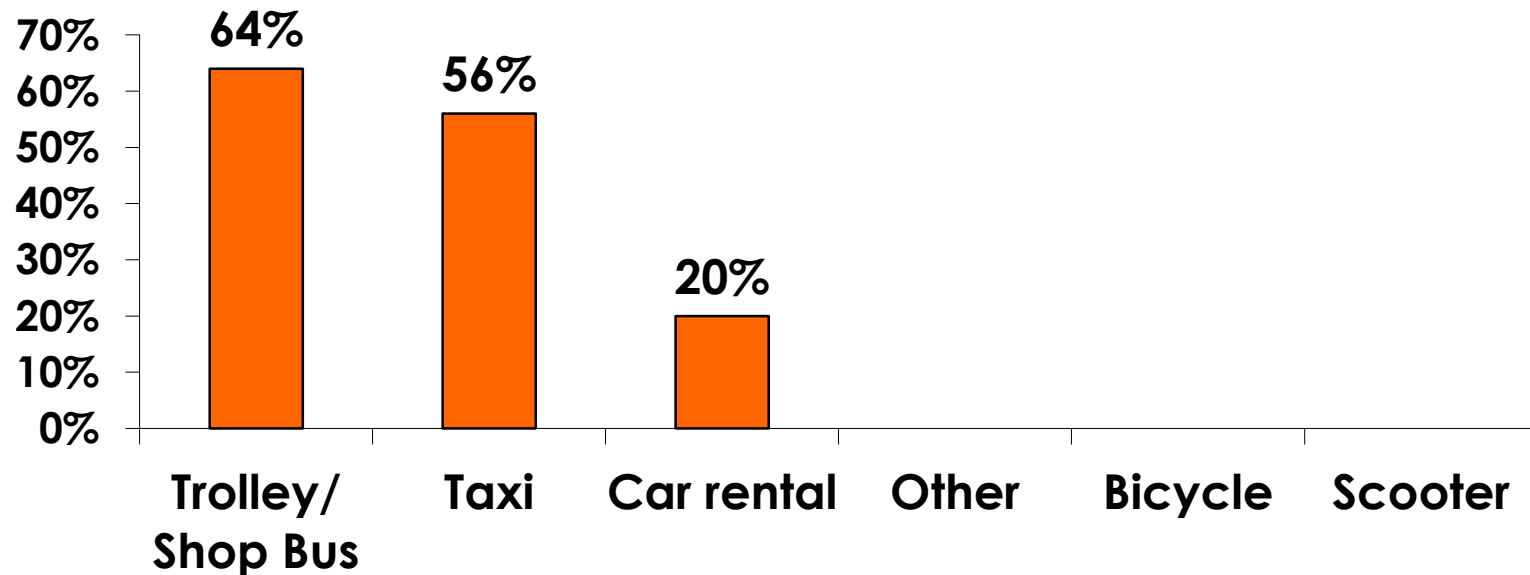
YTD=\$1,159.86

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$55.45
Food & beverage in fast food restaurant/convenience store	\$36.63
Food & beverage at restaurants or drinking establishments outside a hotel	\$95.86
Optional tours and activities	\$76.95
Gifts/ souvenirs for yourself/companions	\$133.55
Gifts/ souvenirs for friends/family at home	\$108.09
Local transportation	\$29.16
Other expenses not covered	\$235.98
Average Total	\$777.19

Local Transportation

n=86



Mean=\$29.16 per travel party

Guam Airport Expenditures

- \$37.44 = Mean
- \$15 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$500 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

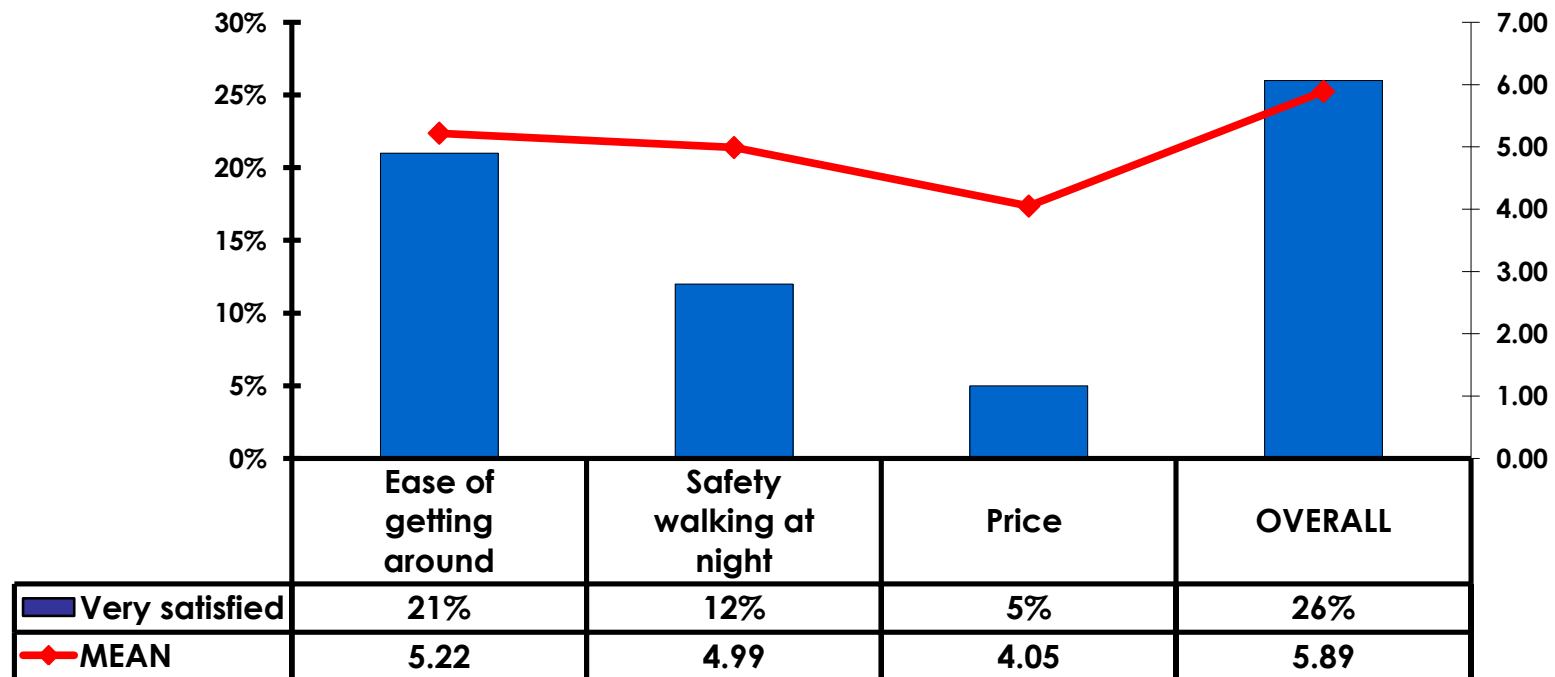
	MEAN \$
Food & Beverages	\$11.03
Gifts/Souvenirs Self	\$10.39
Gifts/Souvenirs Others	\$16.01
Total	\$37.44

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

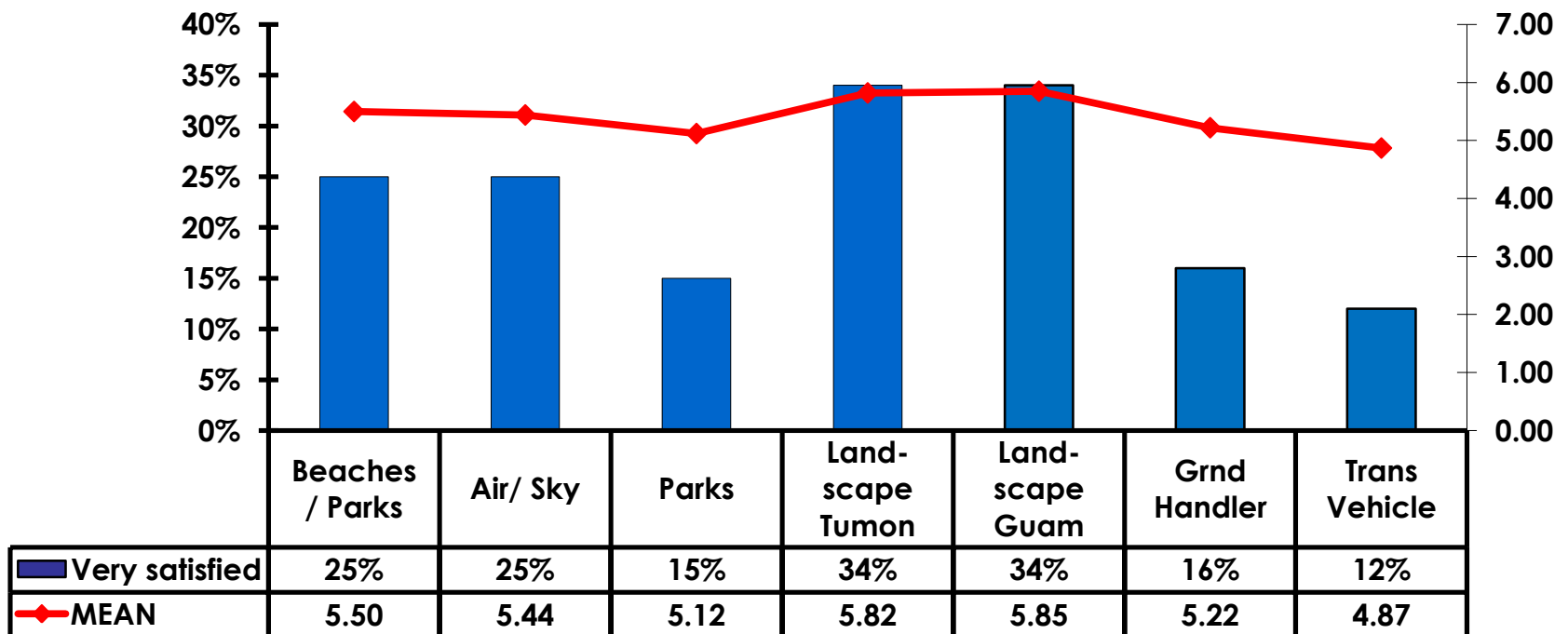
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

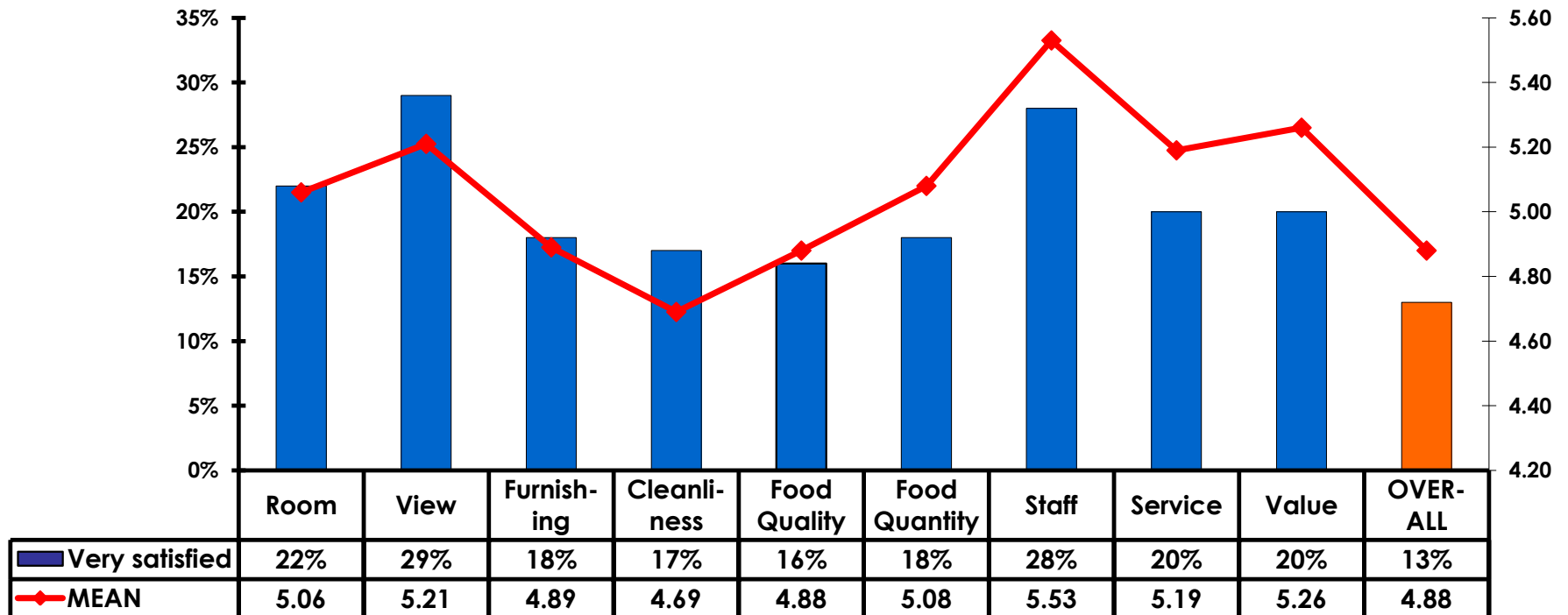
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

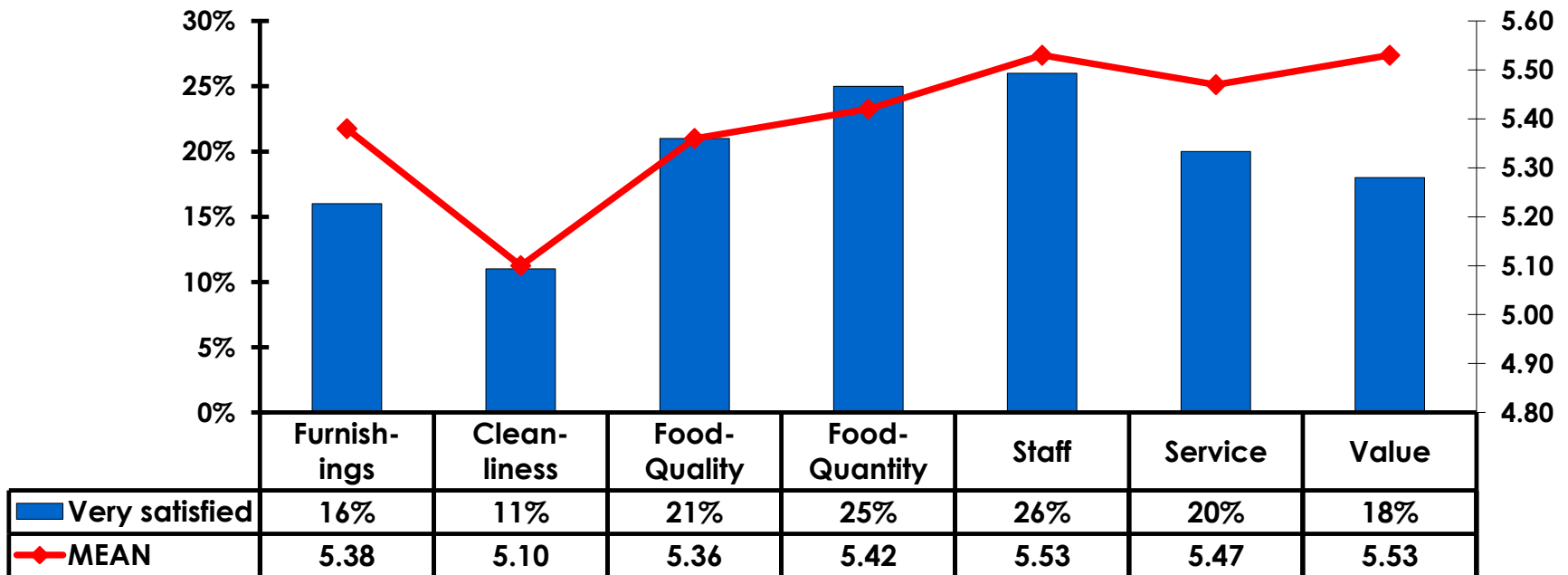
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

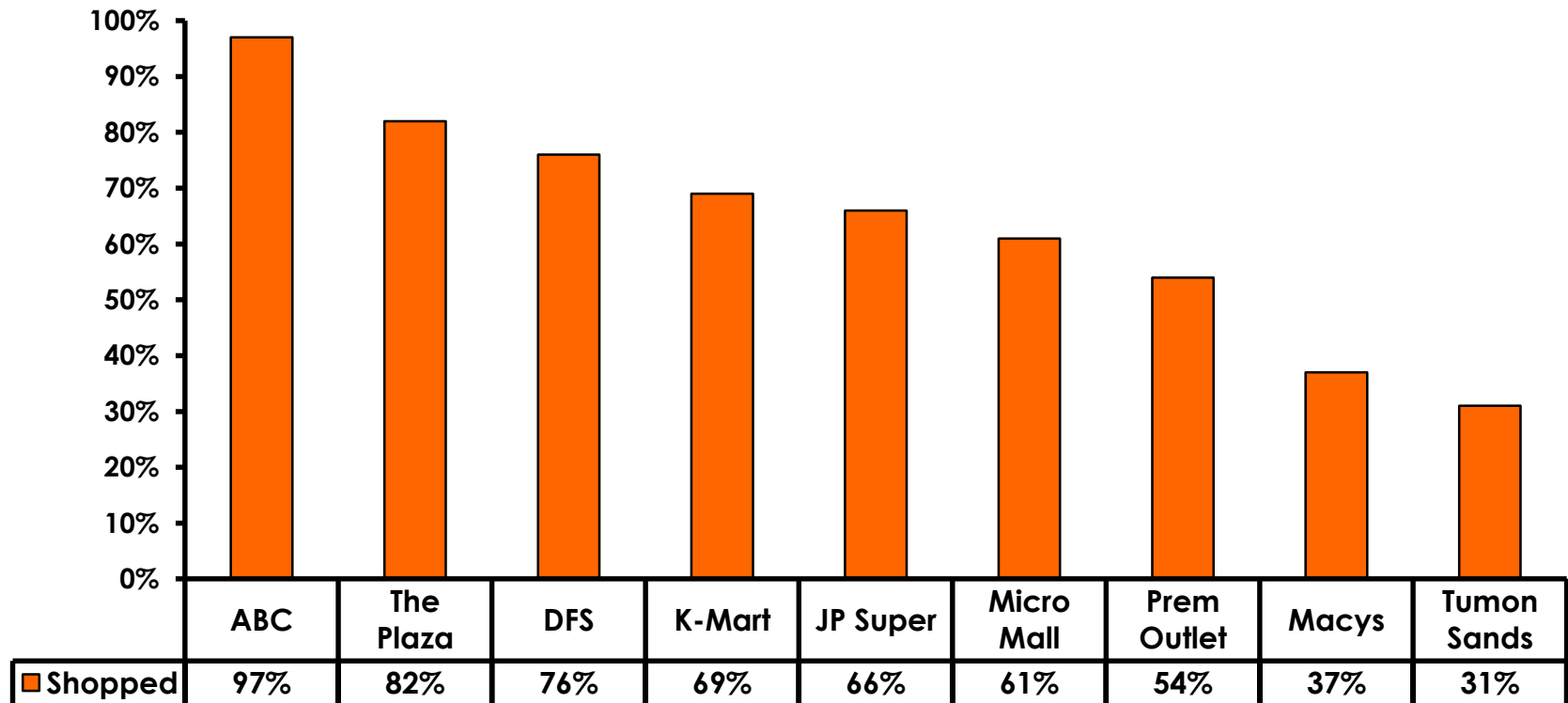
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



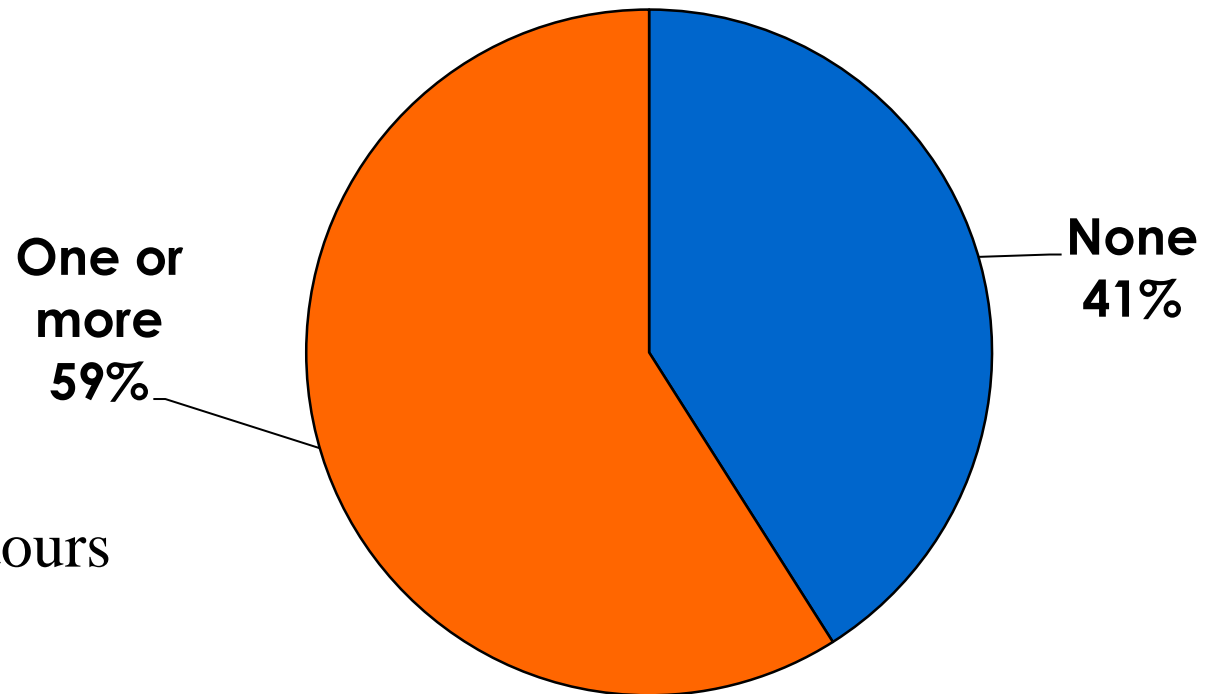
Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 46%	Score of 6 to 7 = 40%
Score of 4 to 5 = 48%	Score of 4 to 5 = 49%
Score 1 to 3 = 8%	Score 1 to 3 = 11%
MEAN = 5.17	MEAN = 4.98

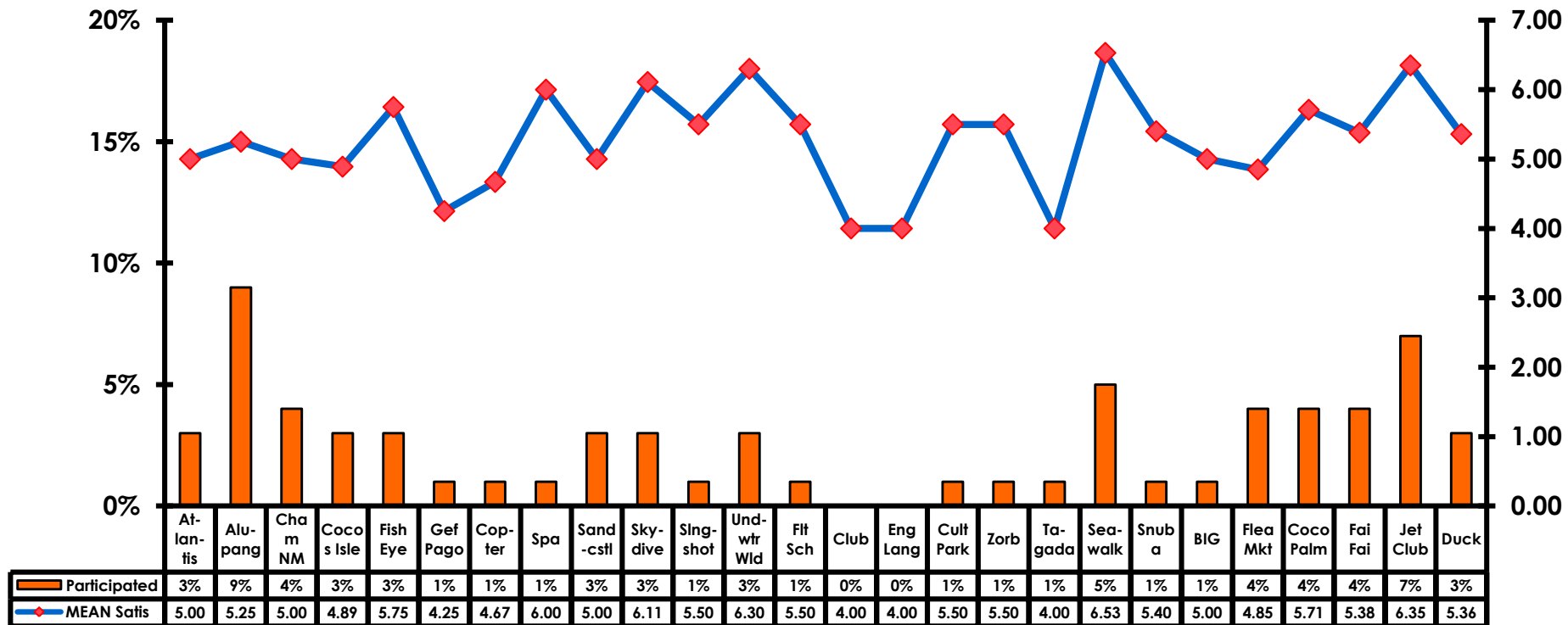
Optional Tour Participation



- Average number of tours participated in is .97

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 = 51%	Score of 6 to 7 = 46%
Score of 4 to 5 = 46%	Score of 4 to 5 = 51%
Score 1 to 3 = 3%	Score 1 to 3 = 2%
MEAN = 5.34	MEAN = 5.23

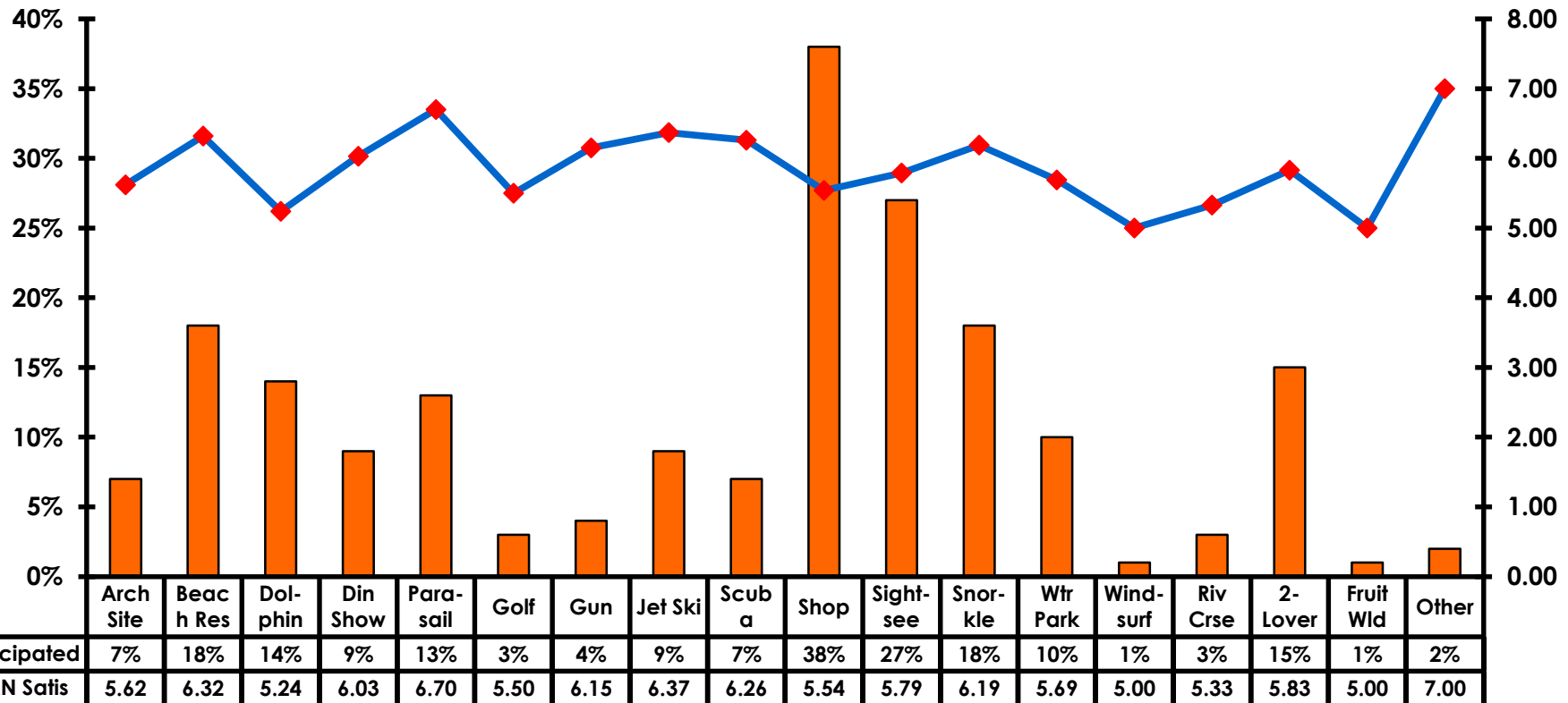
Night Tours Satisfaction

7pt Rating Scale

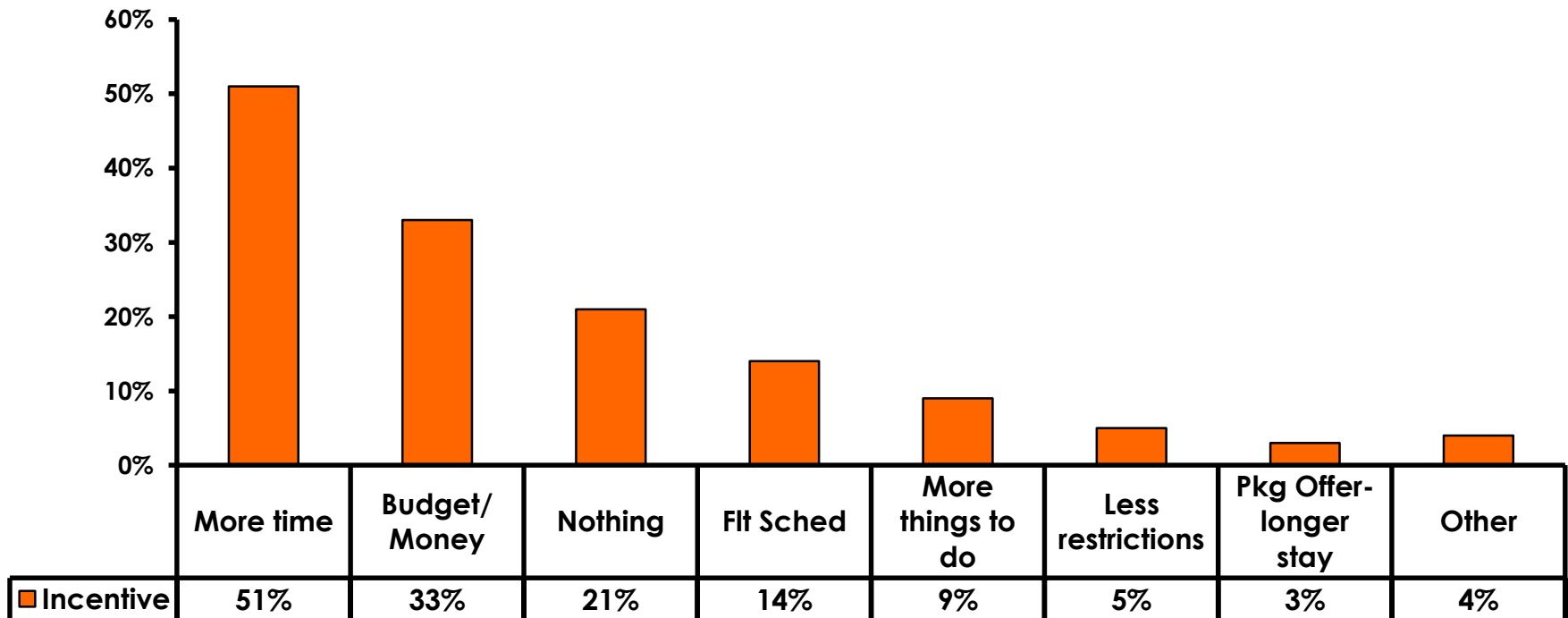
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 22%	Score of 6 to 7 = 22%
Score of 4 to 5 = 75%	Score of 4 to 5 = 76%
Score 1 to 3 = 3%	Score 1 to 3 = 1%
MEAN = 4.63	MEAN = 4.62

Satisfaction with Other Activities



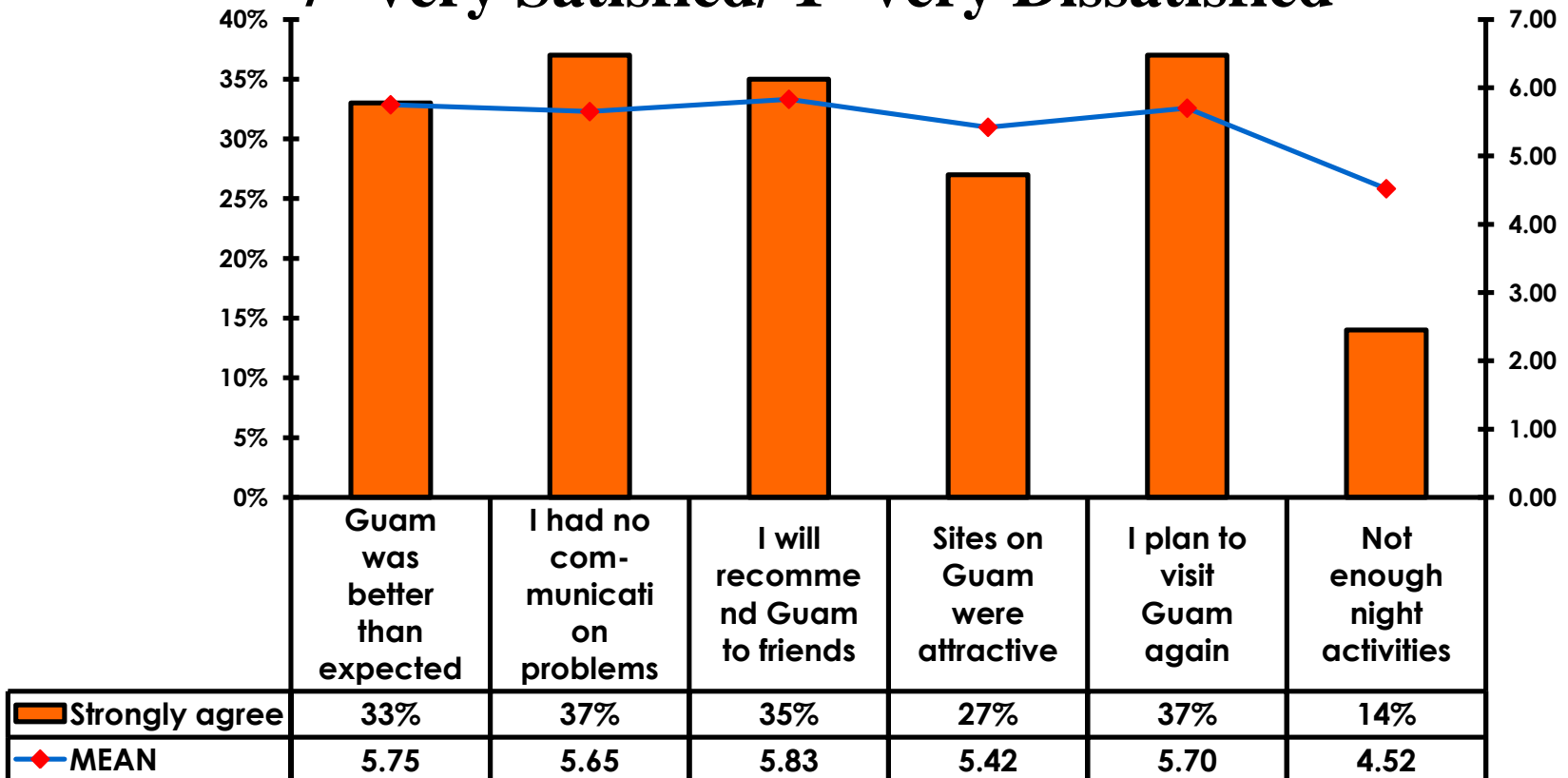
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

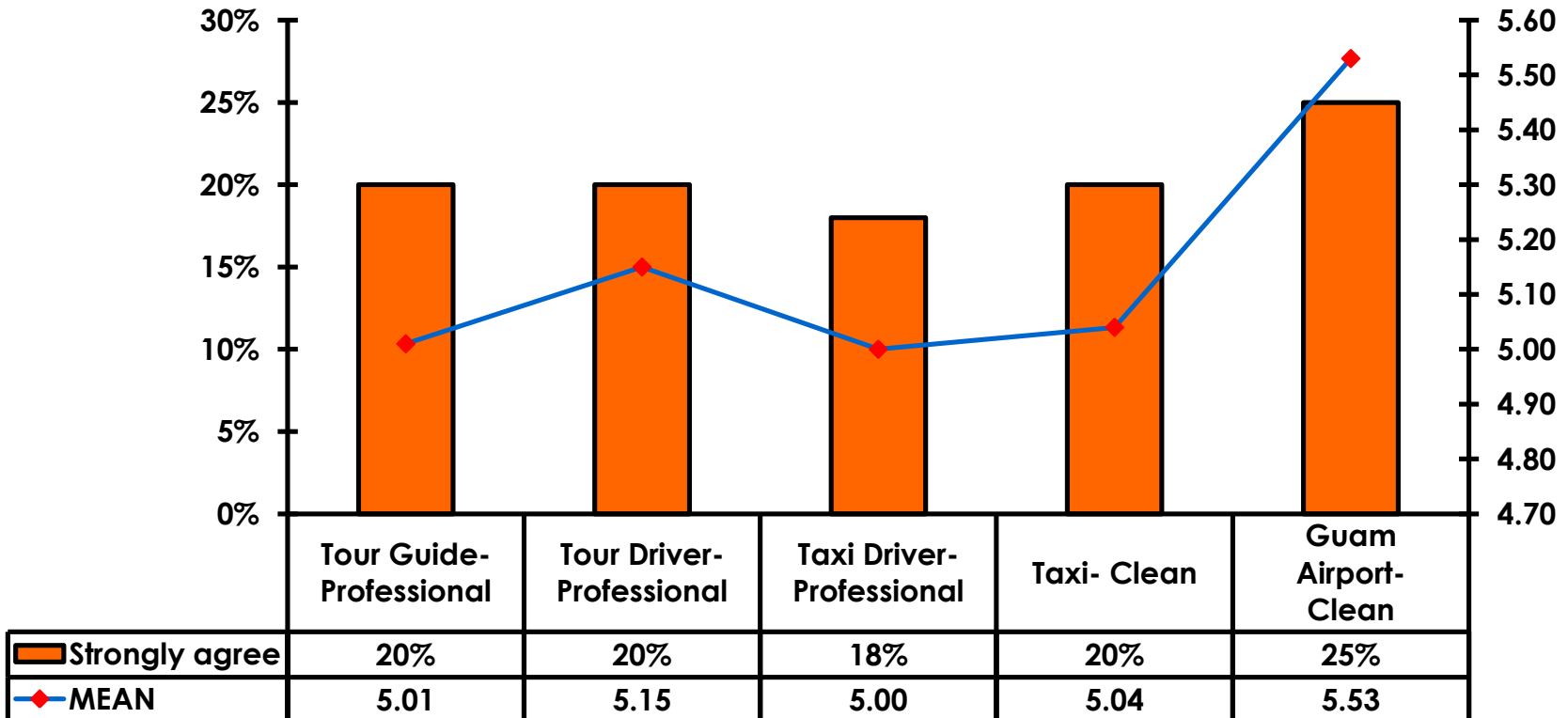
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

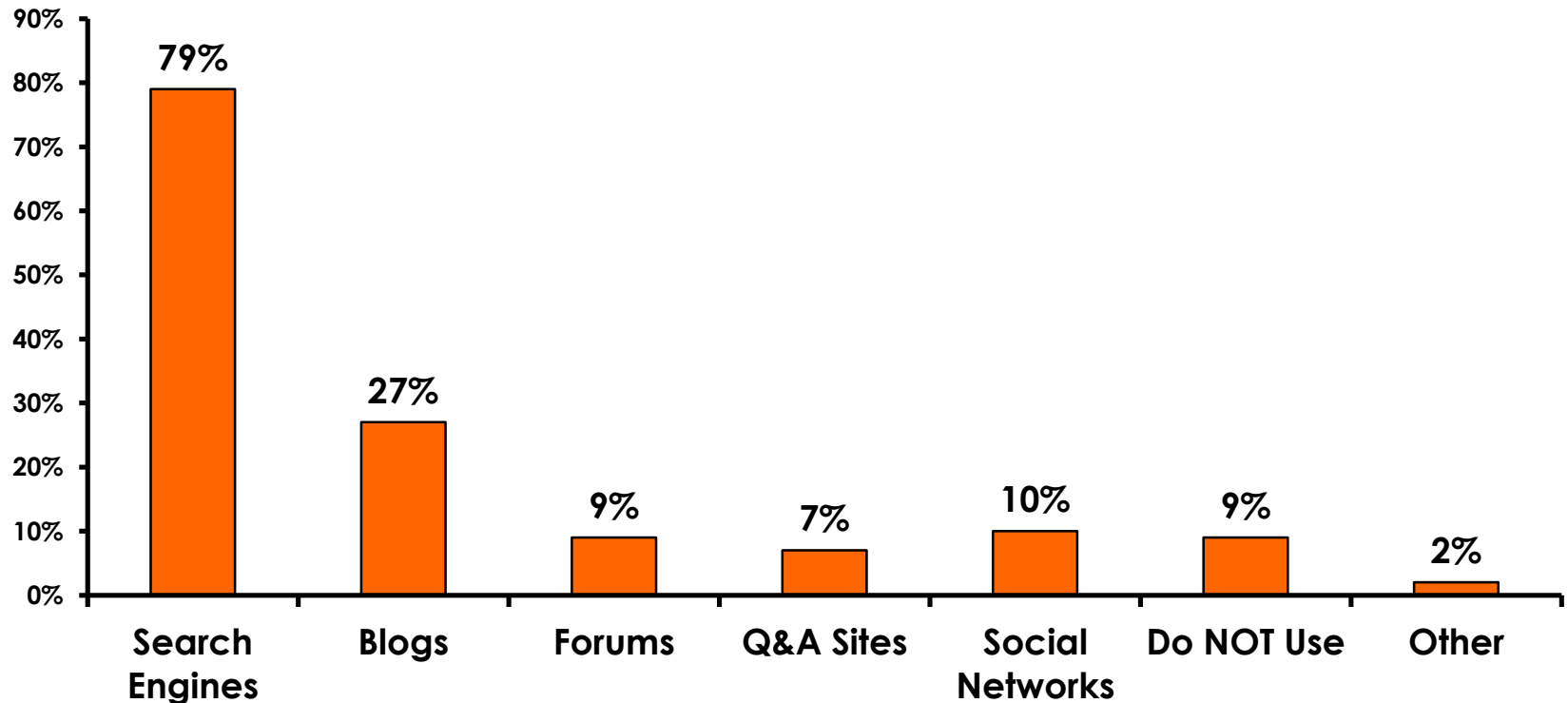
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



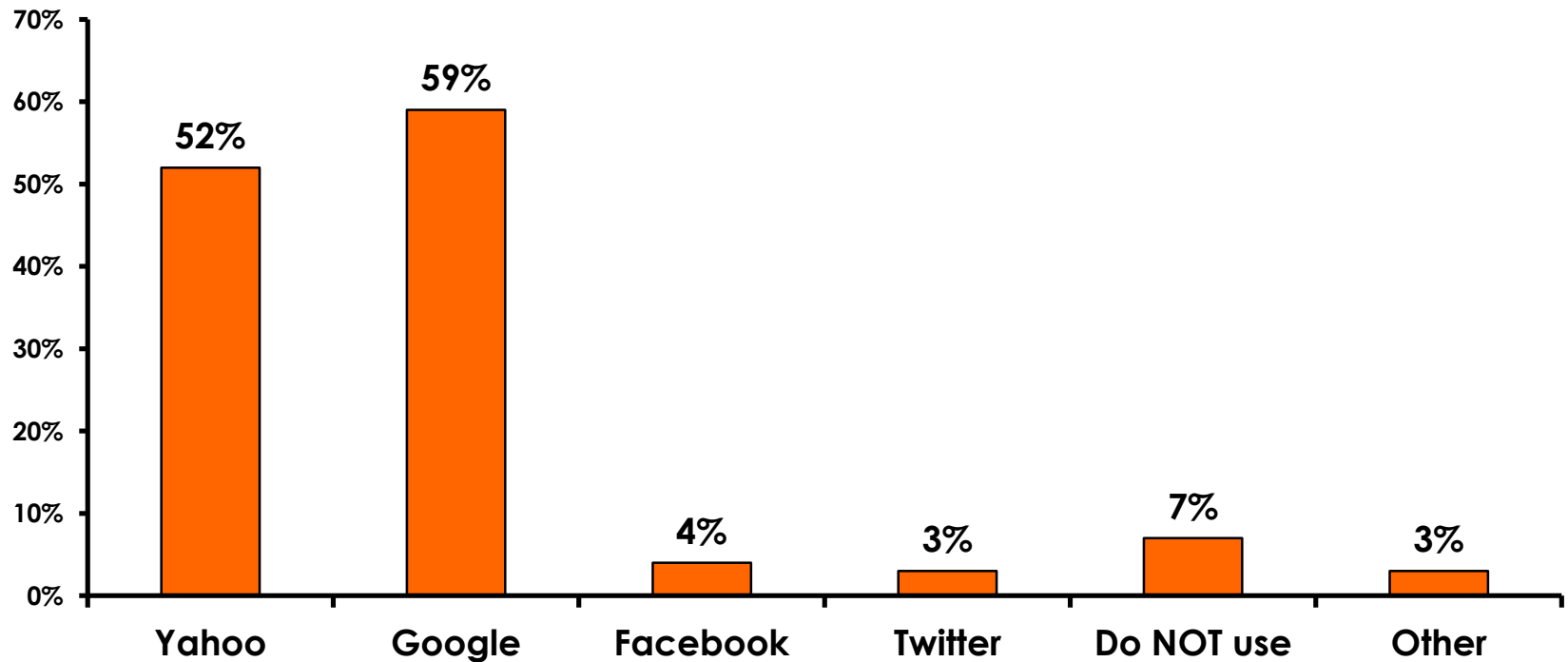
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

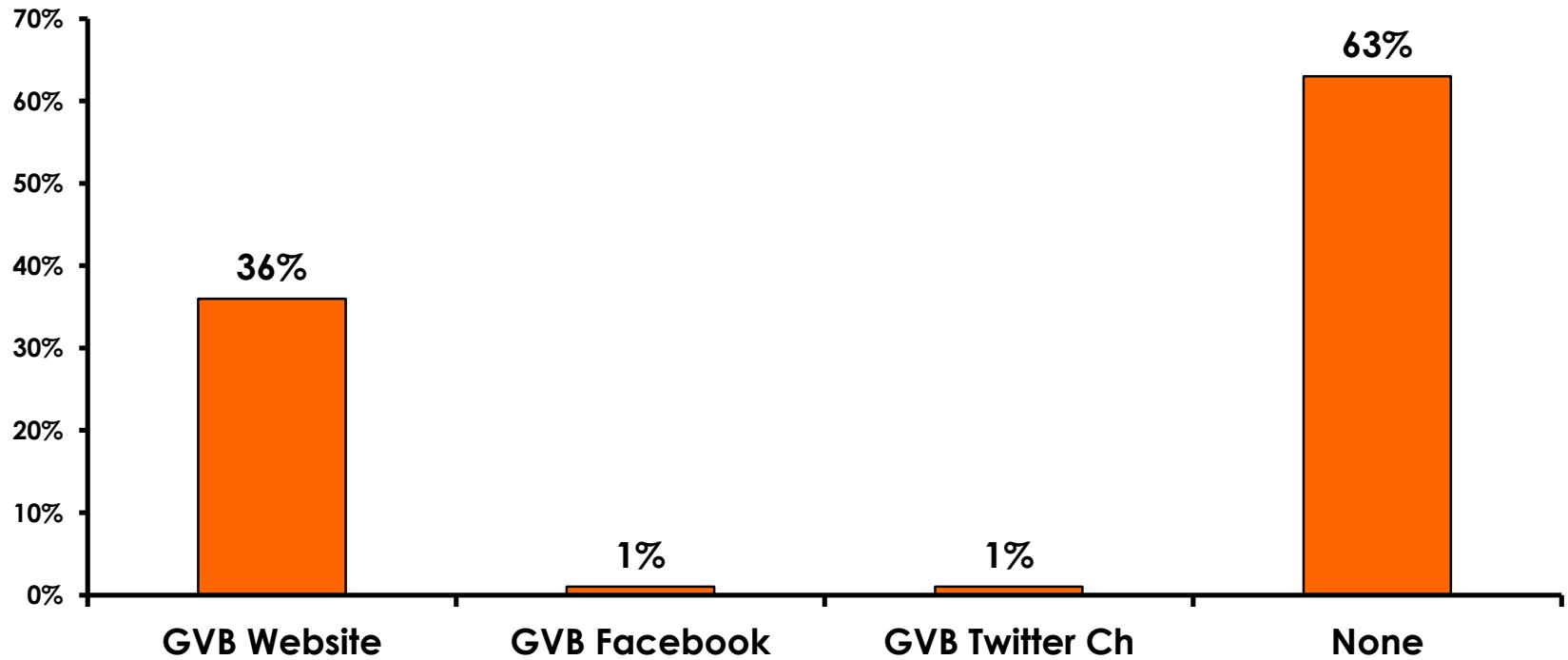


Internet- Things To Do

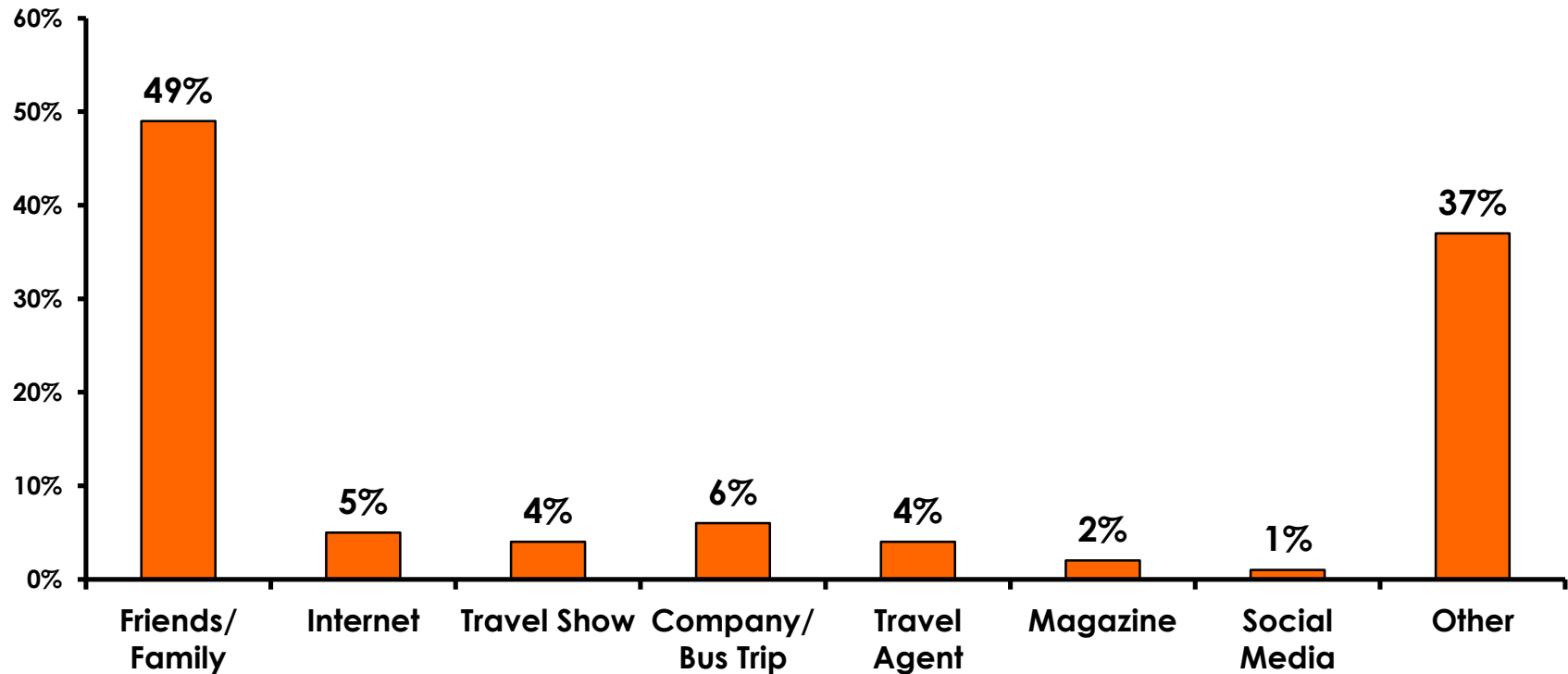
Sources of Info



Internet- GVB Sources

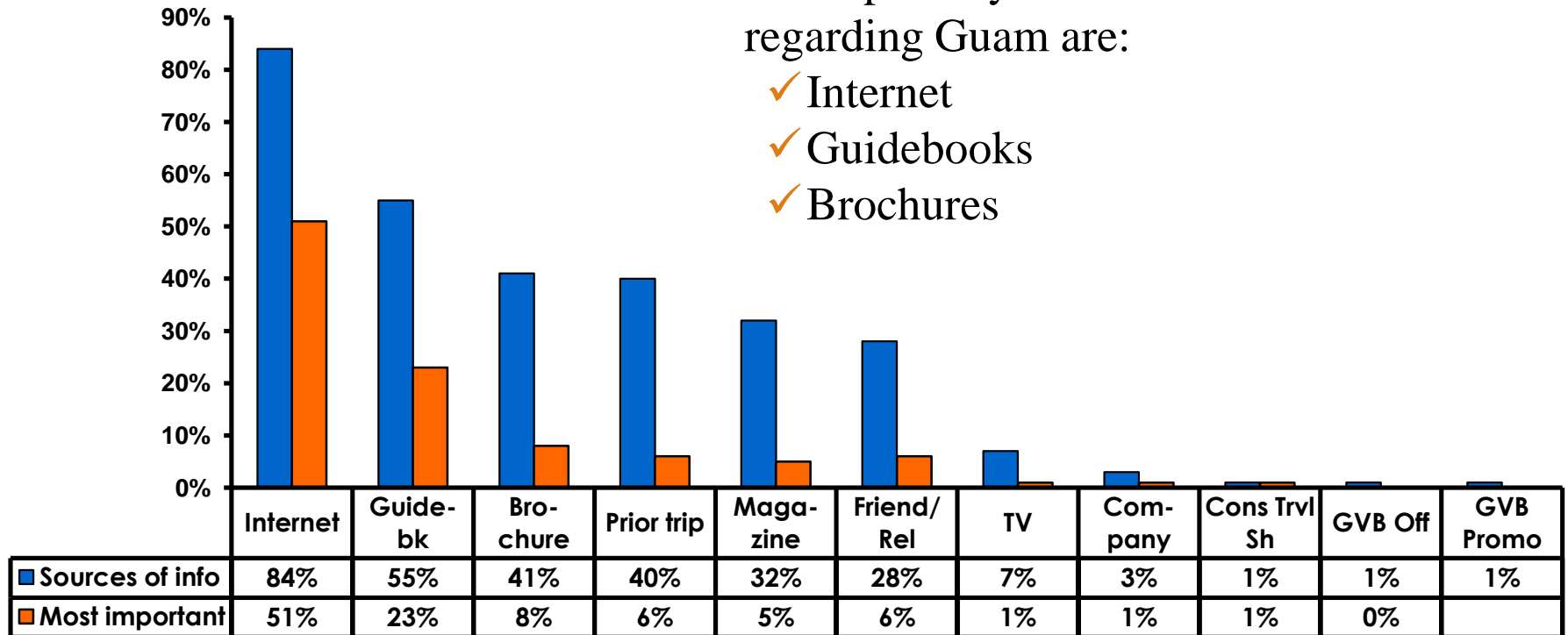


Travel Motivation- Info Sources



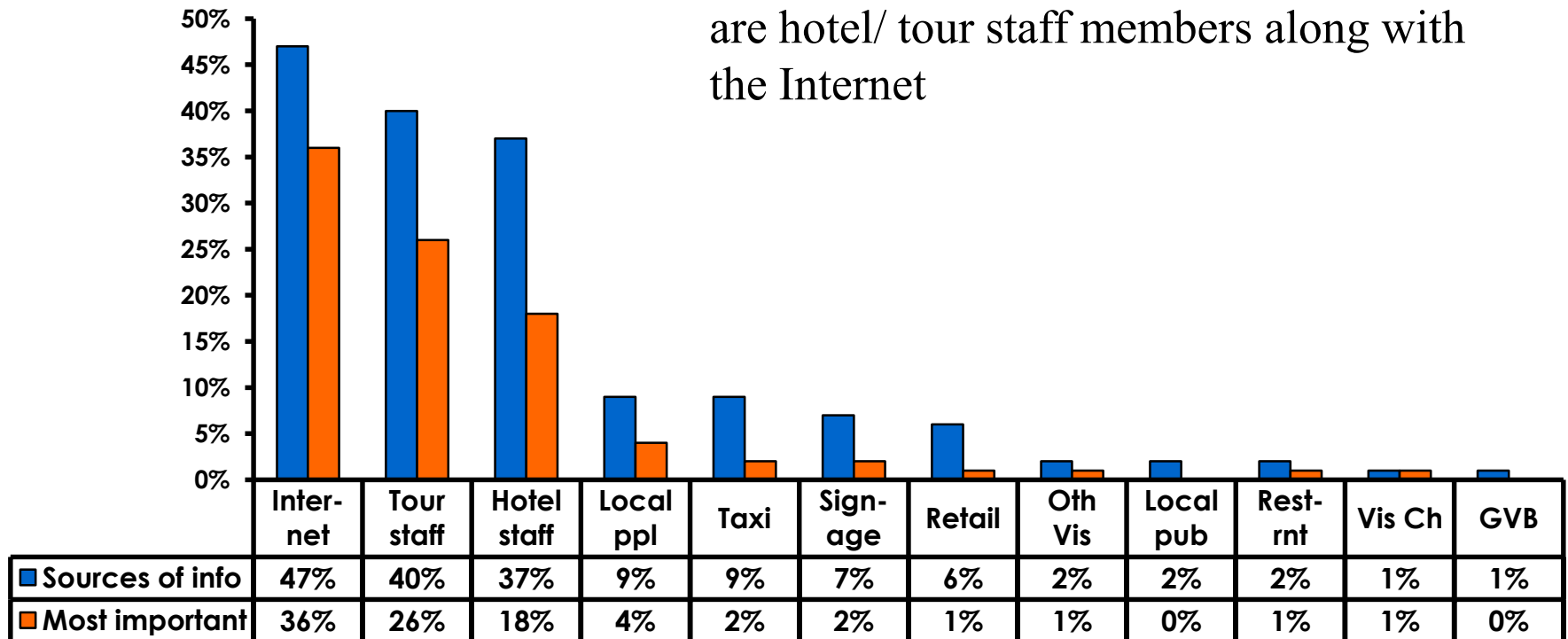
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

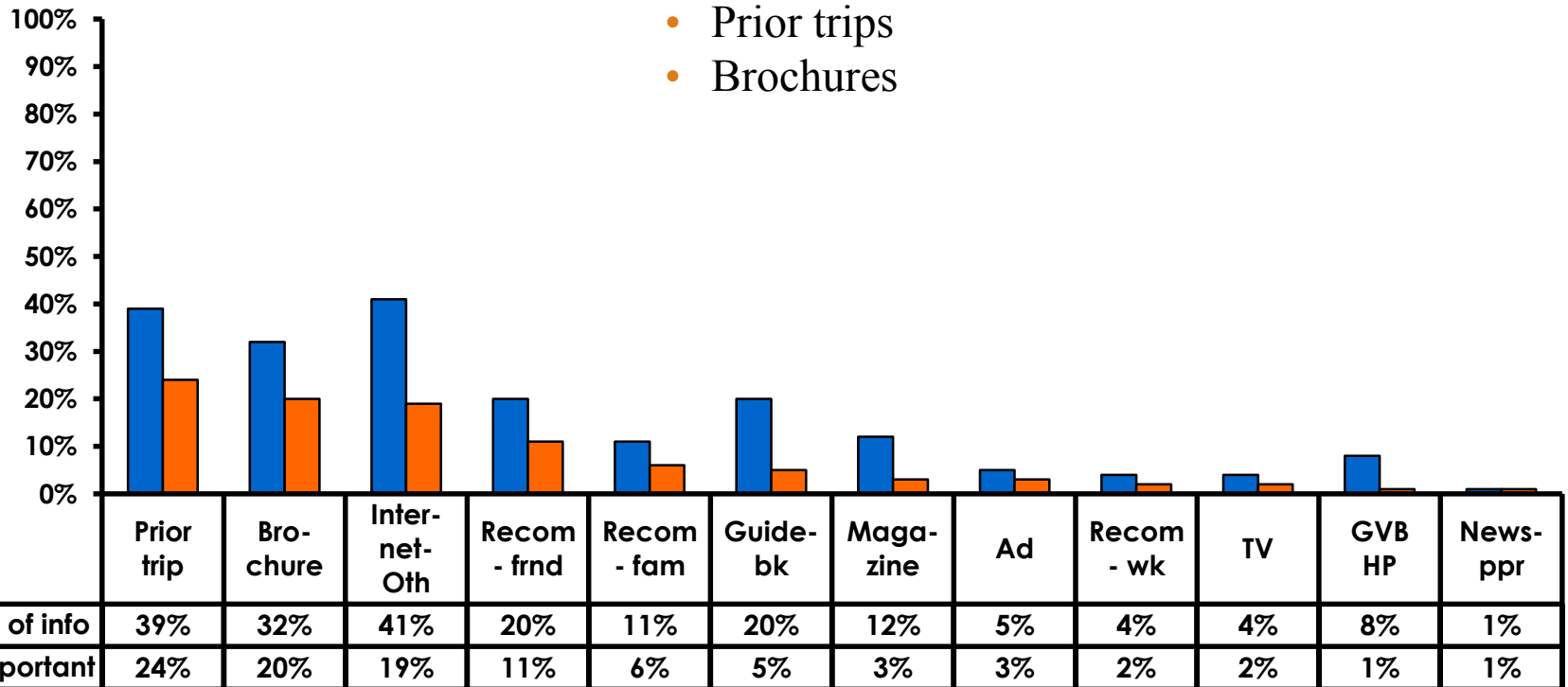
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

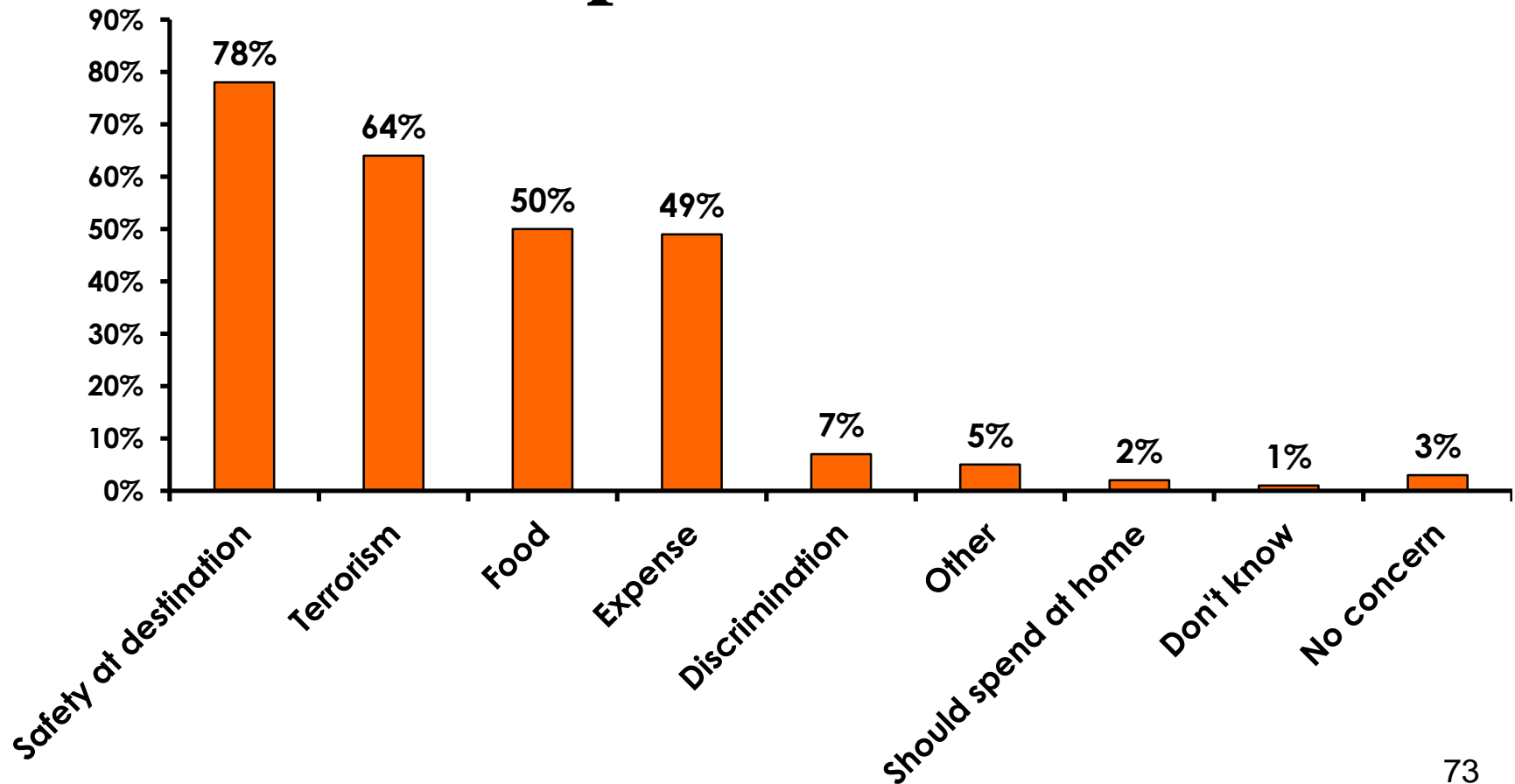
The primary motivational sources of information were.

- Internet sites
- Prior trips
- Brochures



SECTION 6 **OTHER ISSUES**

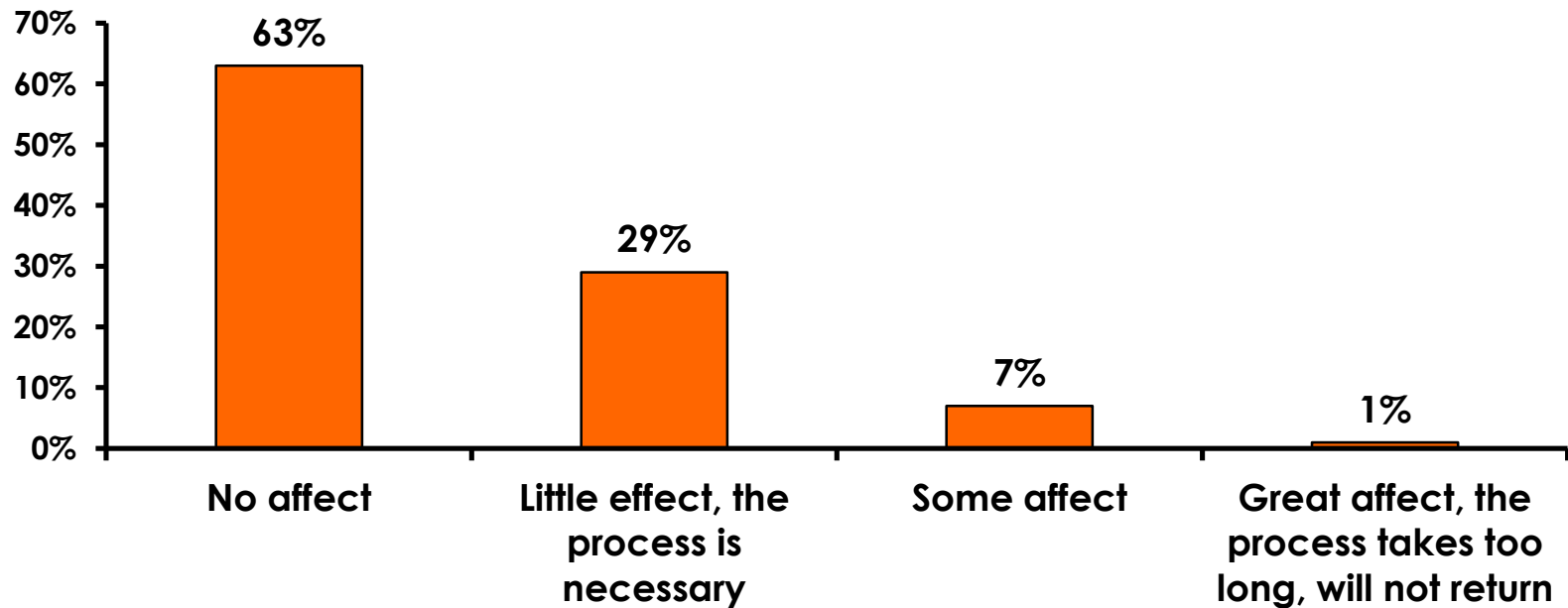
Concerns about travel outside of Japan - Overall



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	78%	77%	80%	79%	69%	62%	77%	80%	74%	75%	83%	84%	86%	
Terrorism	64%	59%	66%	63%	67%	46%	66%	65%	72%	66%	65%	57%	86%	
Food	50%	53%	55%	45%	44%	38%	45%	53%	58%	46%	50%	51%	71%	
Expense	49%	52%	53%	50%	31%	38%	52%	53%	58%	35%	48%	52%	100%	
Discrimination against Japanese	7%	9%	10%	4%	8%		11%	5%	8%	10%	9%	3%	29%	
Other	5%	3%	5%	7%	3%	8%	7%	3%	10%	6%	7%	2%		
No concerns	3%	2%	2%	3%	10%	8%	5%	3%	2%	4%	4%	2%		
Should spend at home	2%	2%	4%	1%	3%	8%	2%	3%	2%	1%	2%	3%		
Don't know	1%	3%	2%	1%				3%				2%		
Total	Count	348	66	128	114	39	13	44	40	50	68	46	61	7

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

