



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015

JUNE 2015



Prepared by: QMark Research

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Background & Methodology

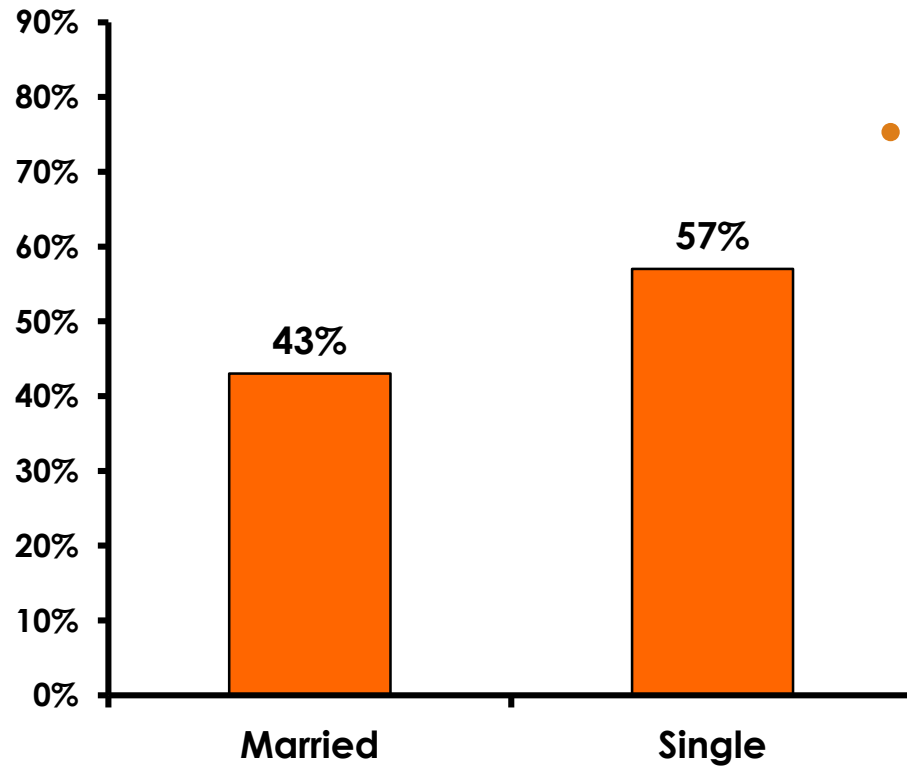
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing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

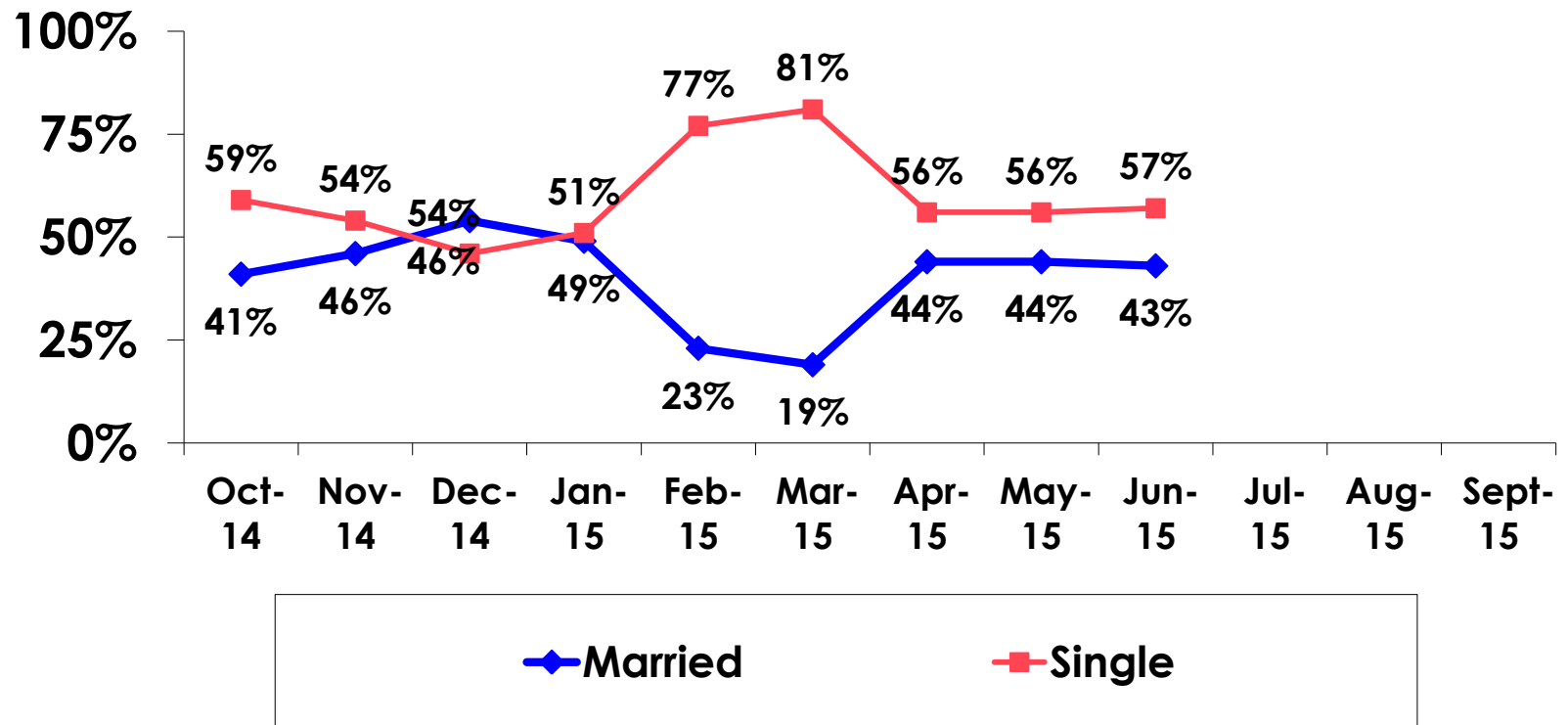
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

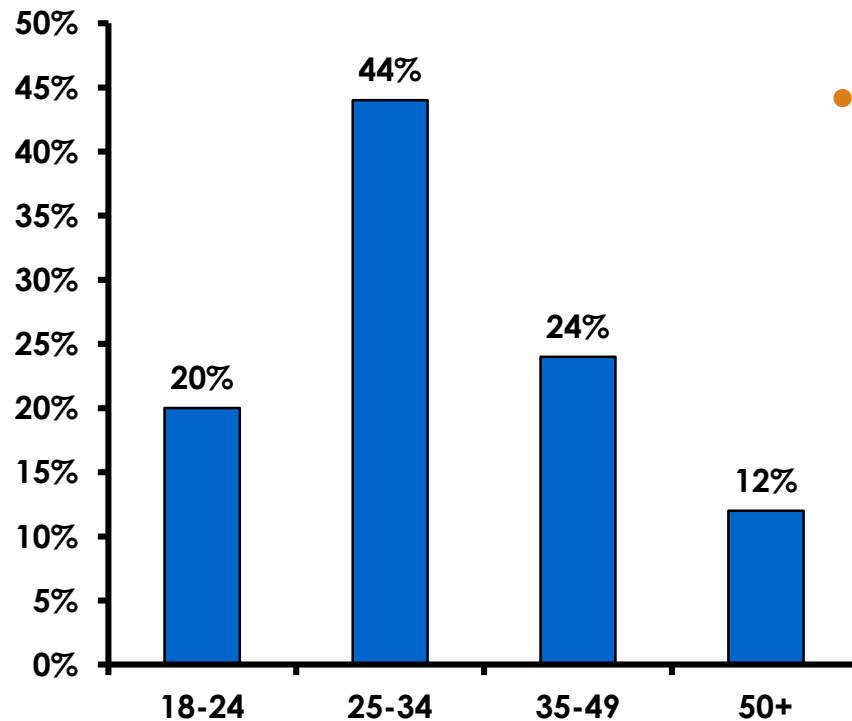


- 63% of first time visitors are single.

MARITAL STATUS

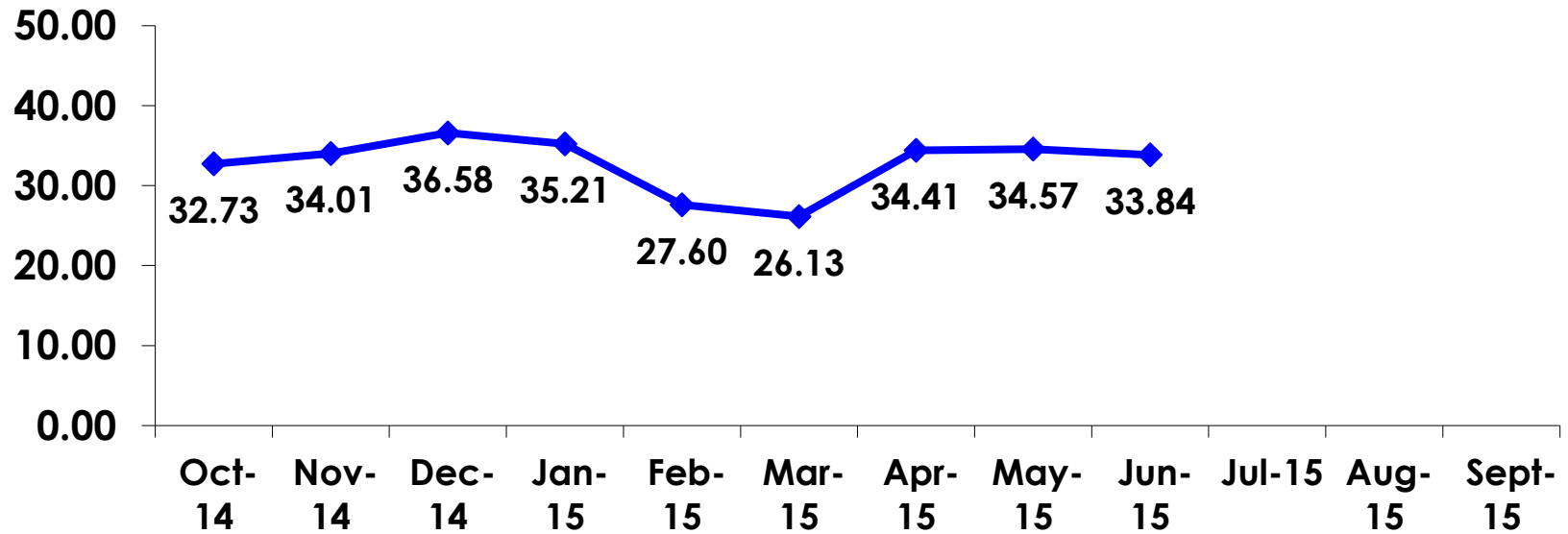


Age - Overall

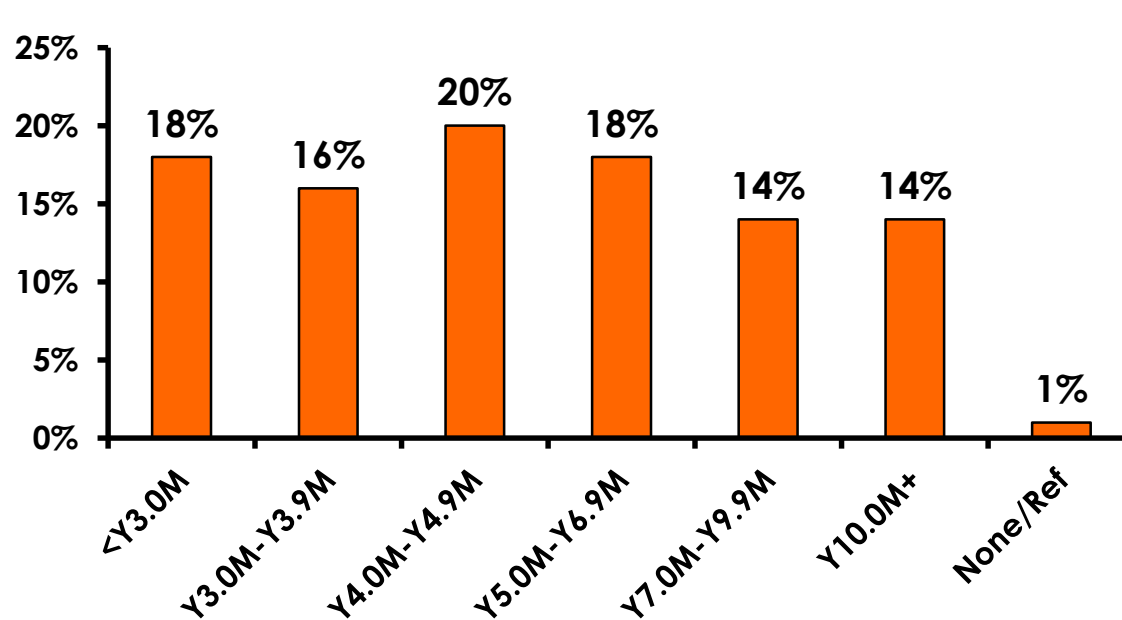


- The average age of the respondents is 33.84 years of age.

AVERAGE - AGE

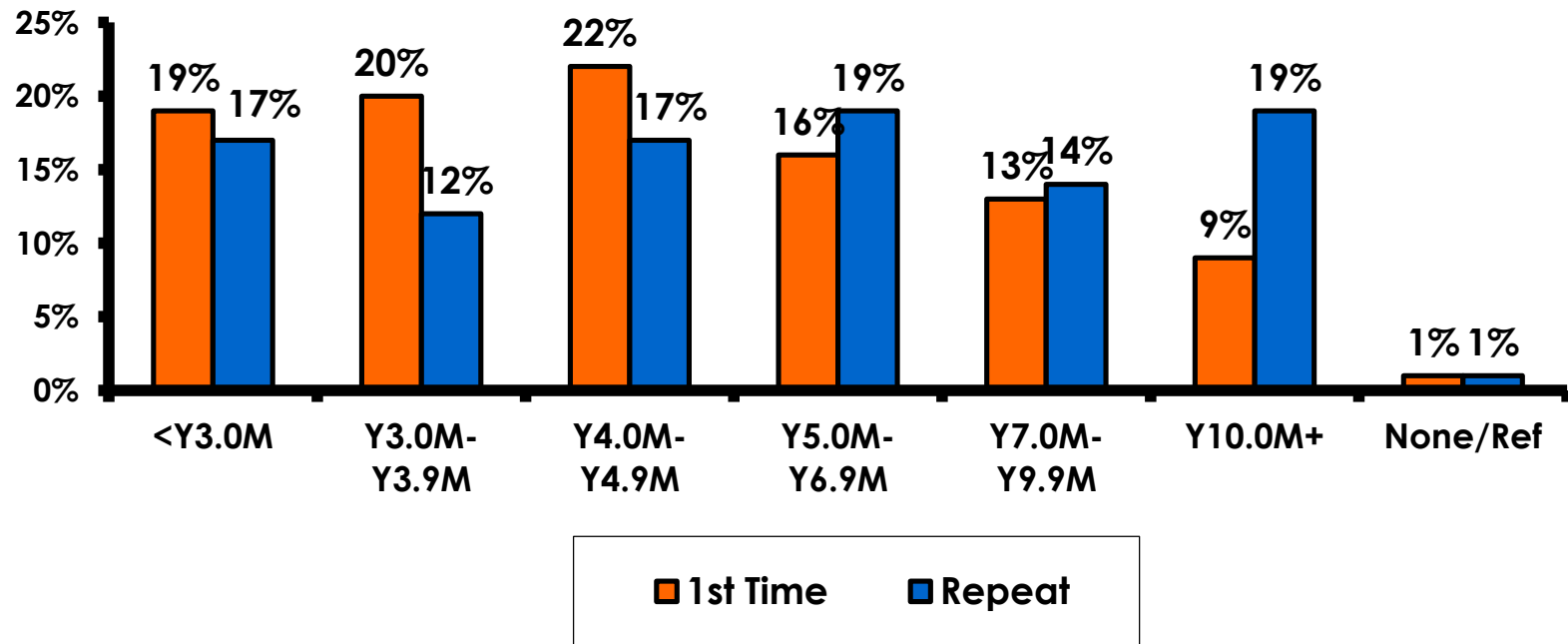


Personal Income



• ¥123.83=\$1

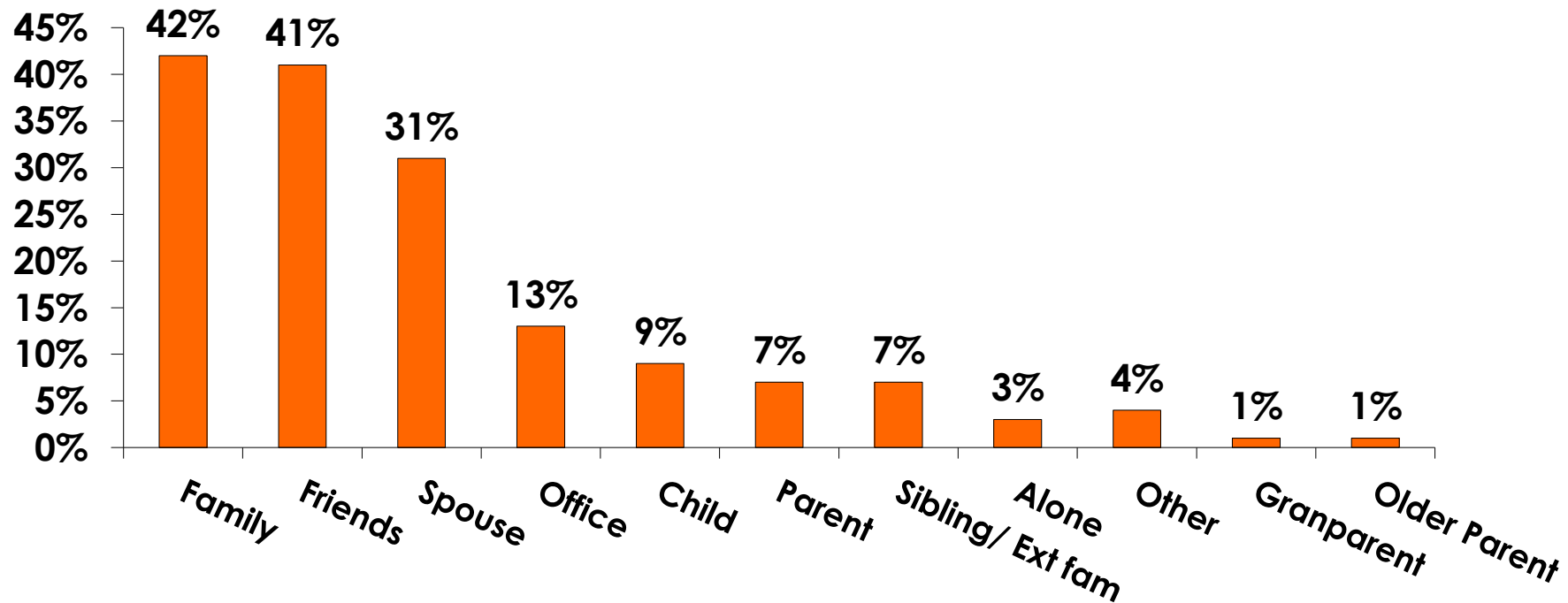
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	9	4	5	2	5	1	1
		Column N %	3%	3%	3%	4%	4%	1%	2%
	Y2.0M-Y3.0M	Count	46	15	31	19	19	3	5
		Column N %	15%	9%	20%	37%	14%	4%	12%
	Y3.0M-Y4.0M	Count	51	28	23	7	36	6	2
		Column N %	16%	18%	15%	14%	26%	8%	5%
	Y4.0M-Y5.0M	Count	61	36	25	5	28	21	7
		Column N %	20%	23%	16%	10%	20%	27%	17%
	Y5.0M-Y7.0M	Count	55	30	25	5	21	20	9
		Column N %	18%	19%	16%	10%	15%	26%	22%
	Y7.0M-Y10.0M	Count	43	25	18	7	13	14	9
		Column N %	14%	16%	12%	14%	9%	18%	22%
	Y10.0M+	Count	42	20	22	5	17	12	8
		Column N %	14%	13%	14%	10%	12%	15%	20%
	No Income	Count	3		3	1	1	1	
		Column N %	1%		2%	2%	1%	1%	
	Total	Count	310	158	152	51	140	78	41

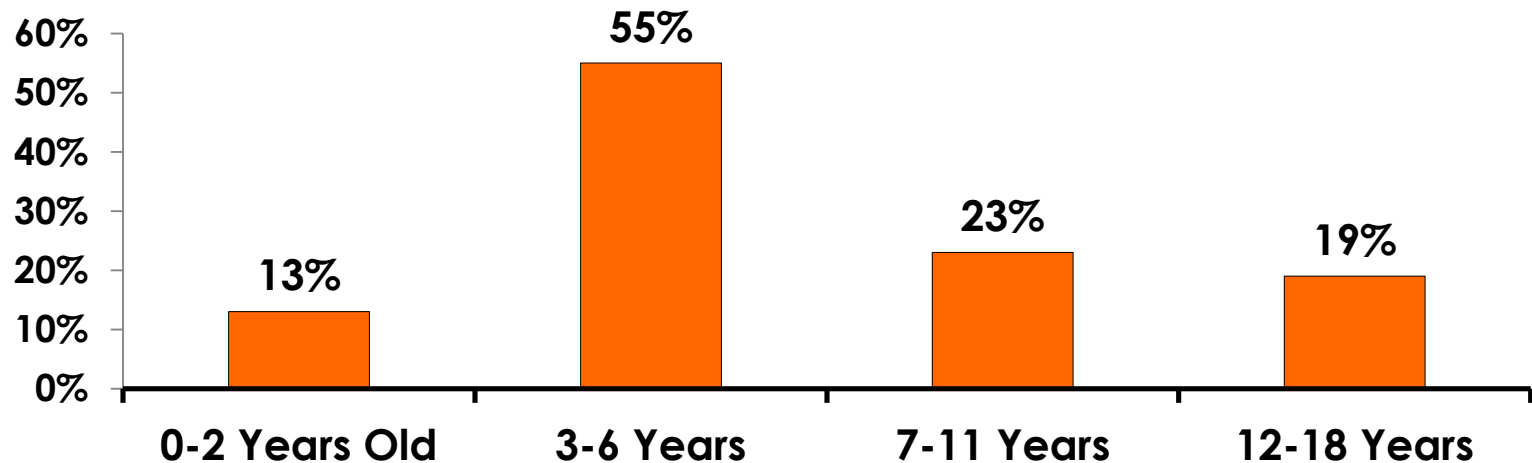
Travel Companions



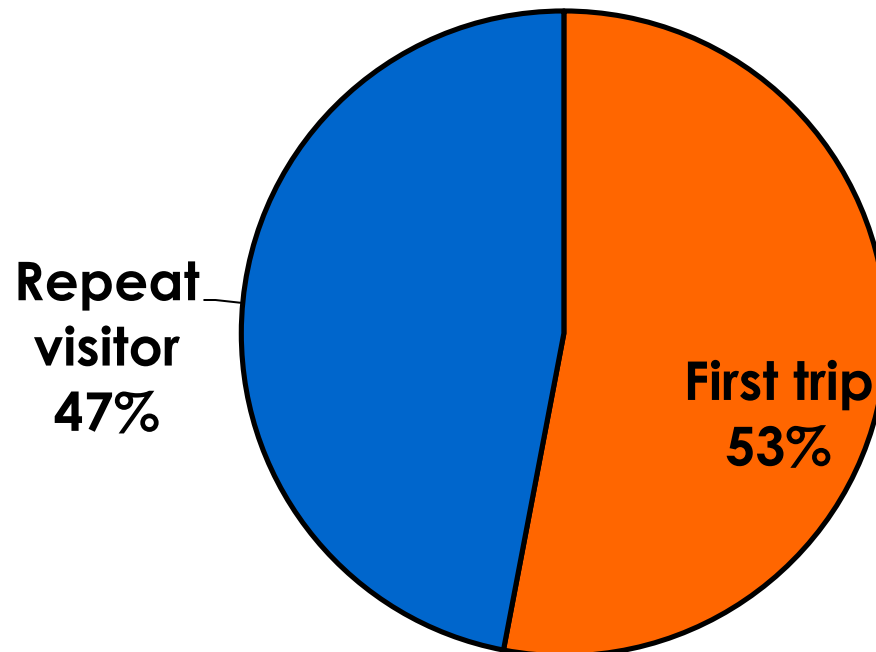
Number of Children Travel Party

N=31 total respondents traveling with children.

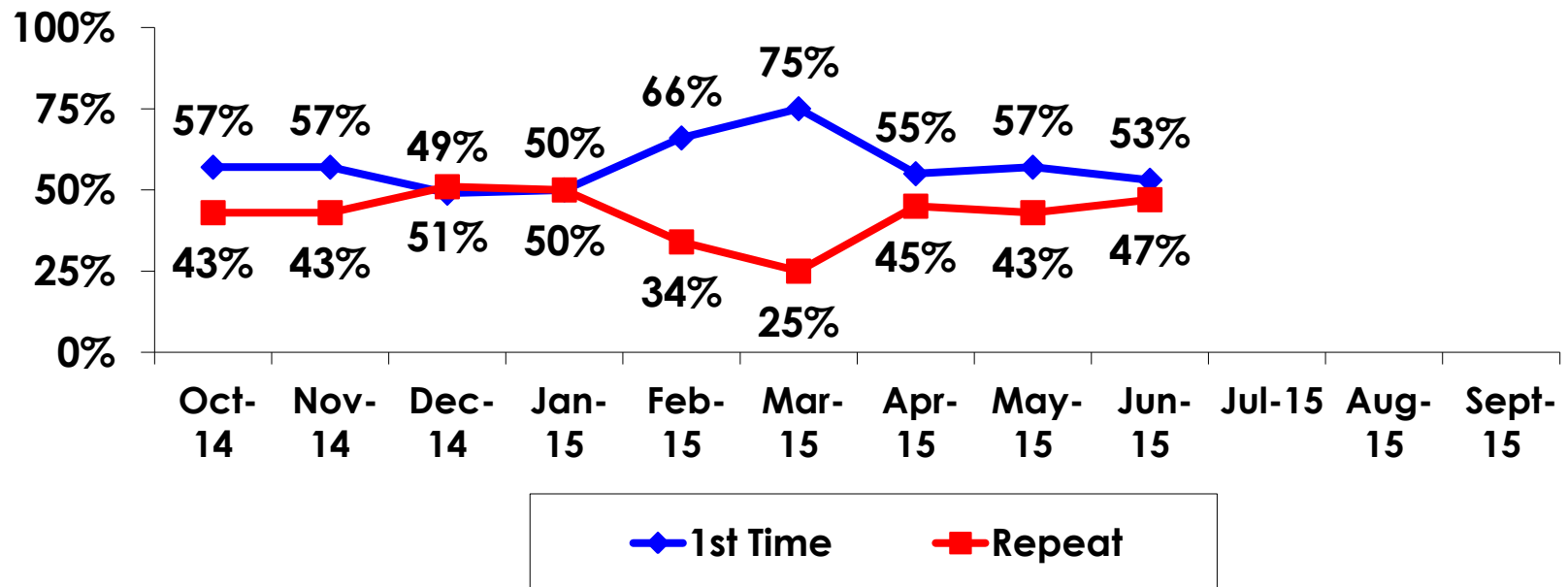
(Of those N=31 respondents, there is a total of 37 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



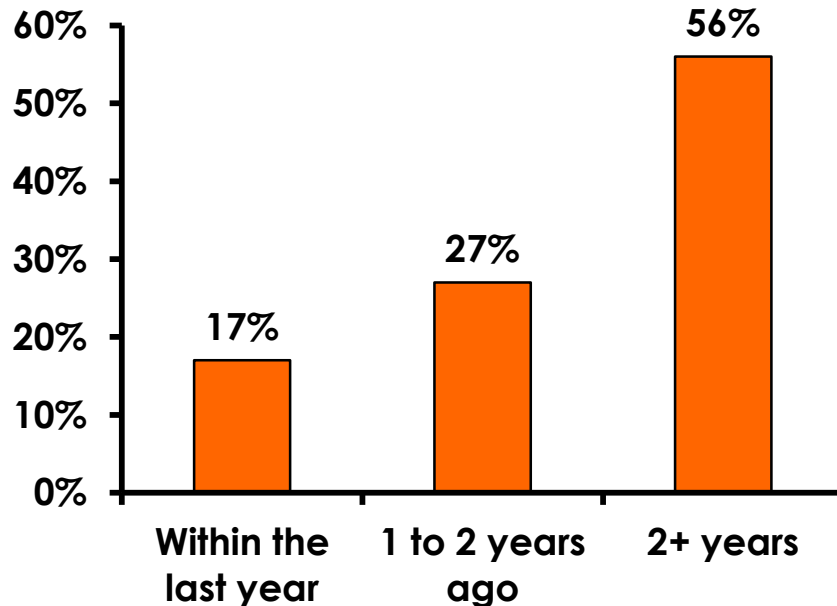
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	167	82	84	
		Column N %	47%	44%	51%	
	Female	Count	185	105	80	
		Column N %	53%	56%	49%	
	Total	Count	352	187	164	
AGE	18-24	Count	71	44	27	
		Column N %	20%	24%	16%	
	25-34	Count	155	91	64	
		Column N %	44%	49%	39%	
	35-49	Count	83	31	51	
		Column N %	24%	17%	31%	
	50+	Count	43	21	22	
		Column N %	12%	11%	13%	
		Total	Count	352	187	164

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

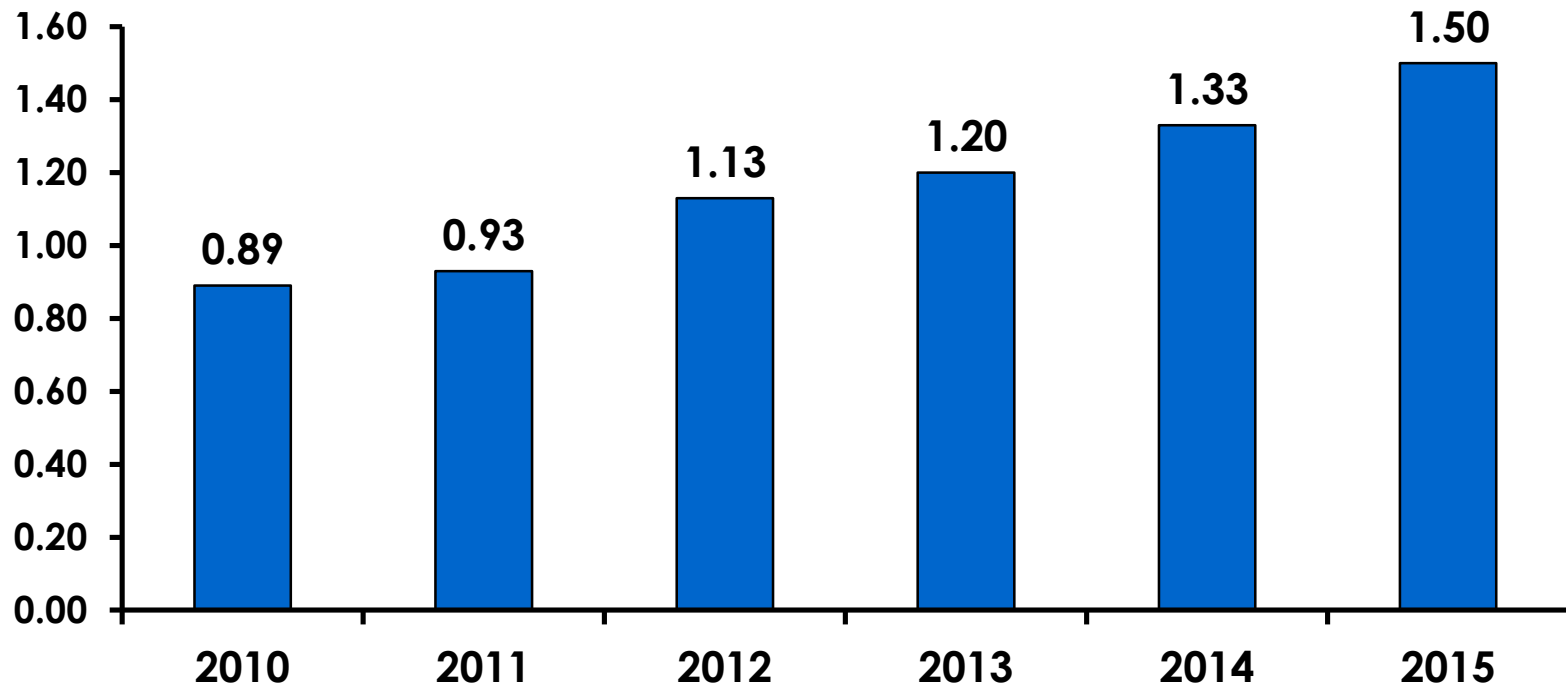
Repeat Visitors Last Trip

n = 158



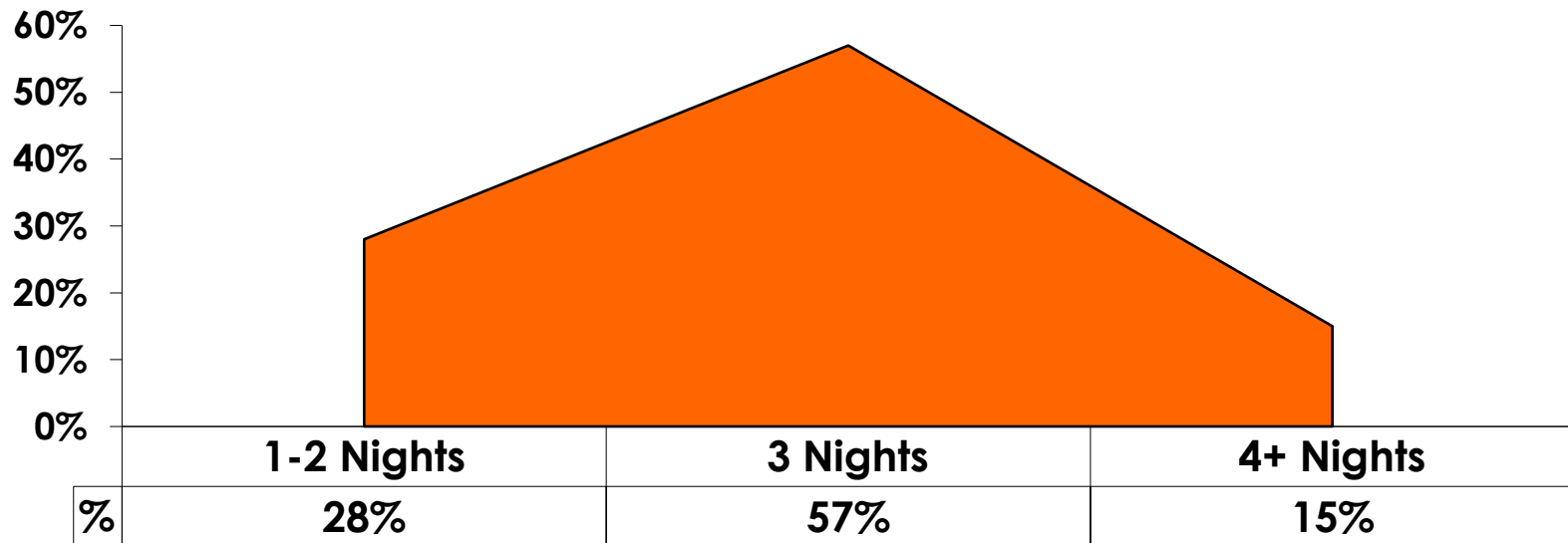
- The average repeat visitor has been to Guam 3.80 times.
- Nearly half of repeat visitors have been to Guam within the last 2 years.

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

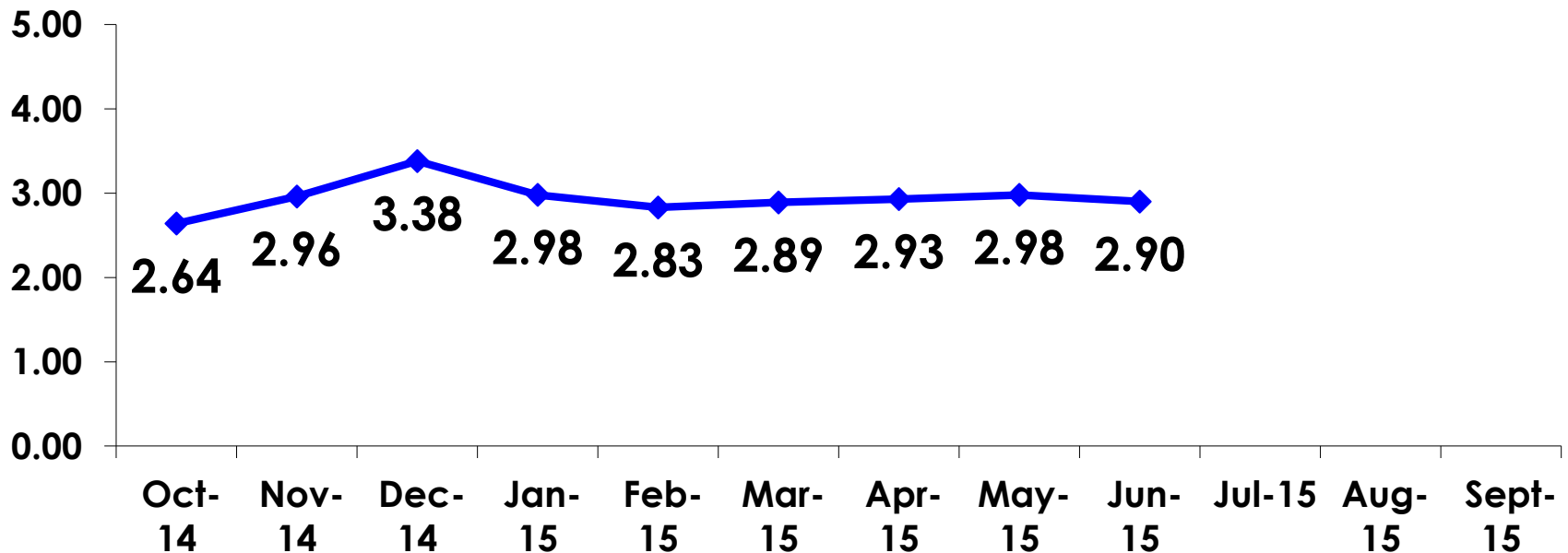


Length of Stay

Mean = 2.90 Days
Median = 3.0 Days



AVG LENGTH OF STAY

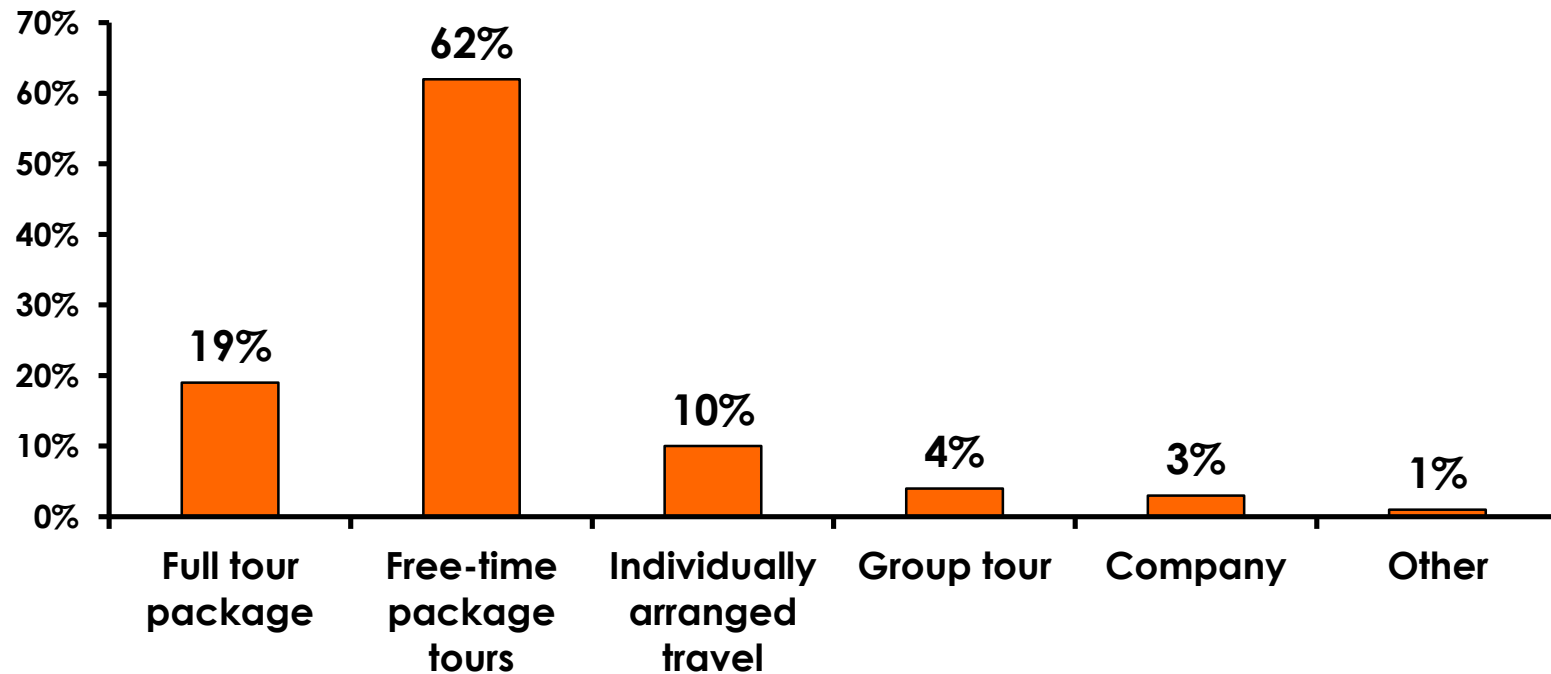


Occupation by Income

		TOTAL	Q26							No Income	
		-	<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+		
Q25	Office worker non-mgr	24%	22%	37%	28%	20%	22%	28%	7%		
	Salesperson	17%		11%	26%	26%	19%	7%	21%		
	Engineer	17%	11%	15%	20%	23%	15%	14%	17%		
	Self-employed	8%	11%	2%	4%	10%	11%	21%	7%		
	Homemaker	5%				8%	9%	5%	14%		
	Skilled worker	5%		13%	4%	2%	7%		5%		
	Manager	5%				2%	7%	12%	7%		
	Freeter	3%	33%	7%	8%		4%				
	Student	3%		2%			2%	2%	2%		
	Professional/ Specialist	3%		4%	2%	3%	2%	2%	7%		
	Unemployed	2%		4%			2%			100%	
	Other	2%			6%	3%			2%		
	Retired	1%	11%	4%				2%			
	Govt- office worker non-mgr	1%			2%	2%		2%	5%		
	Executive (30+ employees)	1%	11%						5%		
	Free-lancer	0%						2%			
	Teacher	0%				2%					
	Govt- Manager	0%						2%			
	Total	Count	343	9	46	50	61	54	43	42	3

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

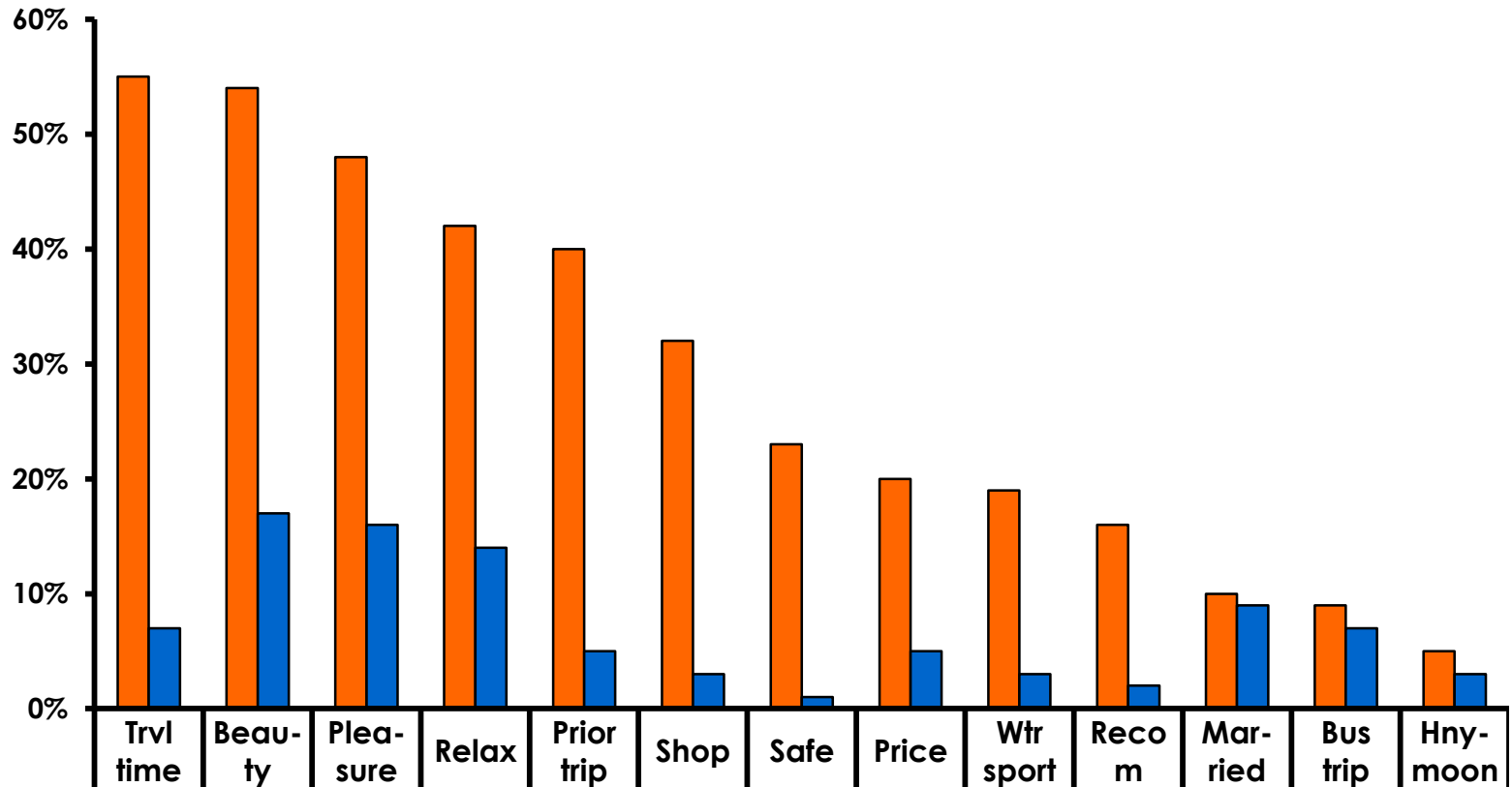


Accommodation by Income

Average length of stay: 2.90 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	Outrigger Guam Resort	11%		15%	16%	13%	7%	14%	7%	33%	
	Guam Plaza Hotel	11%	33%	15%	10%	8%	13%	7%	10%		
	Guam Reef & Olive Spa	9%		7%	8%	10%	7%	7%	12%		
	Hilton Guam Resort	7%	11%	11%	4%	2%	5%	14%	12%	33%	
	Hotel Nikko Guam	7%			4%	10%	7%	7%	14%		
	PIC Club	7%		7%	2%	8%	5%	9%	7%		
	Onward Beach Resort	6%		2%	8%	5%	5%	2%	10%		
	Westin Resort Guam	5%	22%	2%	2%	5%	11%	9%	5%		
	Holiday Resort Guam	5%	11%	4%		8%	2%	7%	7%		
	Grand Plaza Hotel	5%		2%	10%	2%	7%	2%	2%	33%	
	Pacific Star Resort & Spa	4%		9%	10%	2%	2%	5%	2%		
	Aqua Suites	3%		2%	10%	2%	4%	5%			
	Fiesta Resort Guam	3%		2%	2%	7%	4%	5%	2%		
	Other	3%		9%		3%	4%				
	Oceanview Hotel	3%		2%	2%	3%	4%		2%		
	Leo Palace Resort	3%		2%	4%		5%	2%	2%		
	Pacific Bay Hotel	2%	11%	2%	4%		2%				
	Lotte Hotel Guam	2%		2%	4%	7%					
	Sheraton Laguna Guam	2%	11%			3%	2%	2%	2%		
	Hyatt Regency Guam	1%				3%	4%		2%		
	Condo	1%			2%			2%			
	Bayview Hotel	1%		4%							
	Royal Orchid Guam	0%									
	Total	Count	352	9	46	51	61	55	43	42	3

Travel Motivation - Top Responses



Reasons for travel	55%	54%	48%	42%	40%	32%	23%	20%	19%	16%	10%	9%	5%
Most Important	7%	17%	16%	14%	5%	3%	1%	5%	3%	2%	9%	7%	3%

Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure,
- Relaxing atmosphere

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	Short travel time	55%	65%	51%	56%	51%	54%	56%	
	Natural beauty	54%	70%	55%	44%	44%	48%	60%	
	Pleasure	48%	65%	43%	49%	42%	48%	49%	
	Relax	42%	51%	36%	45%	42%	41%	43%	
	Previous trip	40%	38%	35%	51%	42%	42%	39%	
	Shopping	32%	46%	28%	28%	33%	23%	41%	
	Safe	23%	28%	19%	20%	33%	22%	23%	
	Price	20%	31%	17%	16%	19%	13%	26%	
	Water sports	19%	25%	20%	13%	19%	17%	22%	
	Recomm- friend/family/trvl agnt	16%	31%	16%	5%	12%	15%	17%	
	Married/ Attn wedding	10%	1%	14%	6%	16%	10%	10%	
	Company/ Business Trip	9%	10%	12%	9%		8%	11%	
	Other	5%		3%	13%	5%	7%	4%	
	Honeymoon	5%		8%	7%		10%	1%	
	Scuba	5%	7%	5%	4%	5%	5%	4%	
	Visit friends/ Relatives	3%	4%	1%	2%	9%	5%	2%	
	Golf	2%	1%		2%	7%	3%	1%	
	Company Sponsored	1%		2%	2%		2%	1%	
	Organized sports	0%		1%				1%	
	Total	Count	351	71	155	82	43	166	185

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	Short travel time	55%	33%	43%	57%	61%	51%	60%	57%	67%	
	Natural beauty	54%	56%	61%	59%	51%	38%	57%	55%	33%	
	Pleasure	48%	44%	54%	39%	51%	38%	48%	50%	67%	
	Relax	42%	22%	48%	35%	43%	31%	48%	50%		
	Previous trip	40%	33%	41%	31%	38%	40%	38%	60%	67%	
	Shopping	32%	44%	35%	18%	36%	24%	31%	40%	67%	
	Safe	23%	22%	28%	14%	18%	20%	40%	24%		
	Price	20%	22%	13%	14%	18%	22%	26%	19%		
	Water sports	19%	33%	15%	14%	25%	16%	19%	17%	33%	
	Recomm- friend/family/trvl agnt	16%	33%	24%	18%	11%	13%	10%	10%		
	Married/ Attn wedding	10%	33%	15%	6%	7%	11%	7%	7%		
	Company/ Business Trip	9%		15%	16%	11%	7%	5%	7%		
	Other	5%			6%	3%	9%	7%	7%	33%	
	Honeymoon	5%		2%	2%	15%	5%	5%	2%		
	Scuba	5%		2%	6%	3%	2%	7%	2%		
	Visit friends/ Relatives	3%		2%	2%		5%	2%		33%	
	Golf	2%			2%		5%	2%	2%		
	Company Sponsored	1%	11%			3%		5%			
	Organized sports	0%			2%						
	Total	Count	351	9	46	51	61	55	42	42	3

SECTION 3 **EXPENDITURES**

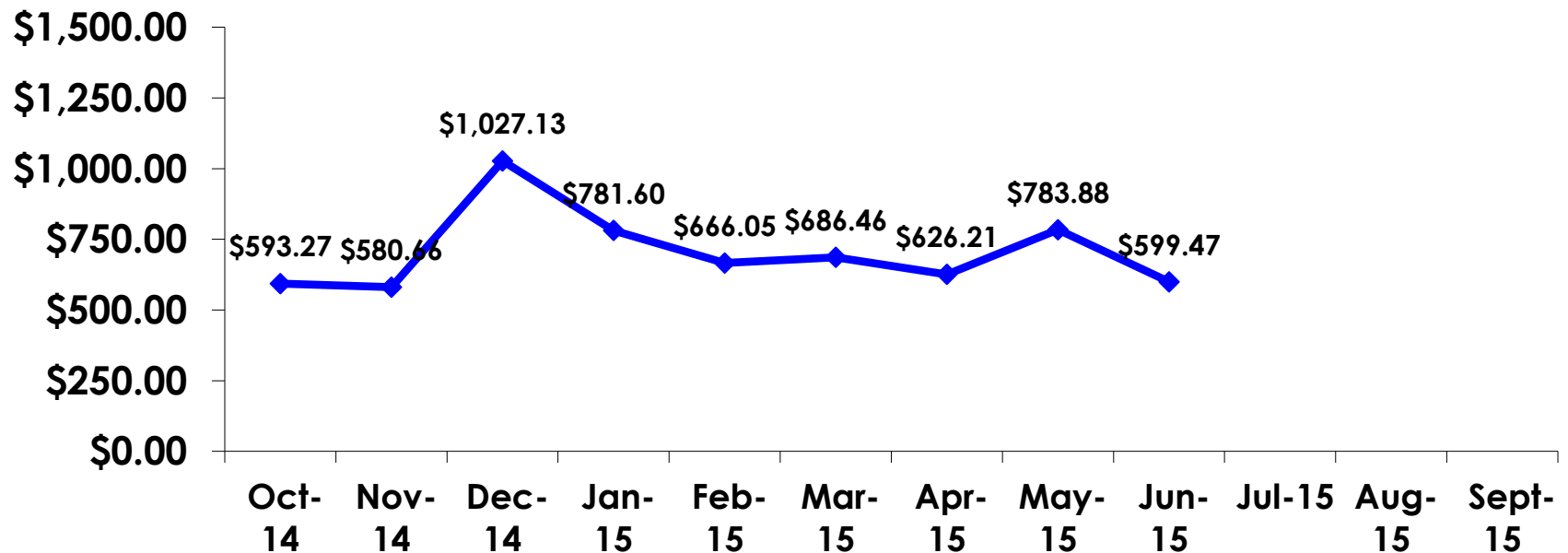
Prepaid Expenditures

¥123.83/US\$1

- \$1,033.49 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$13,728 = maximum (highest amount recorded for the entire sample)
- \$599.47 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$704.99

Breakdown of Prepaid Expenditures

¥123.82=\$1

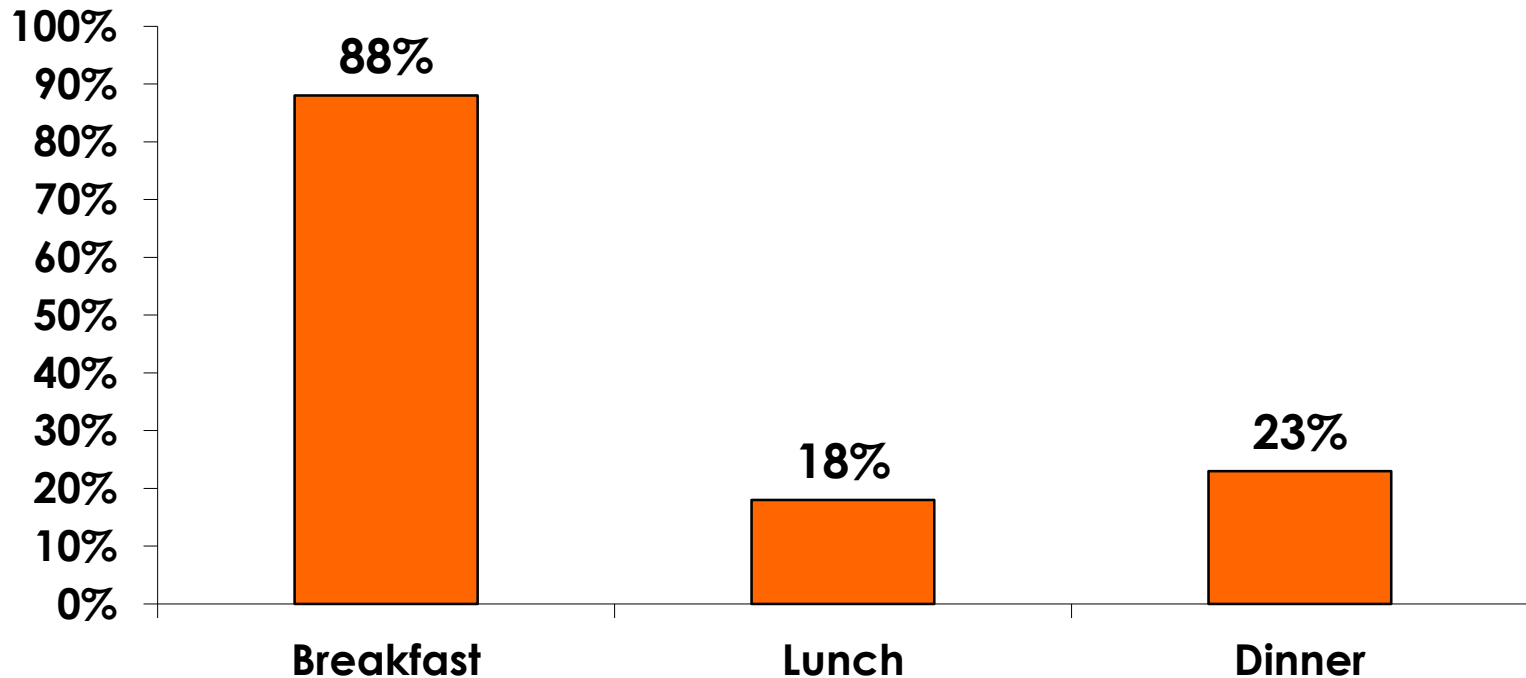
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,096.29
Air & Accommodation w/ daily meal package	\$1,535.38
Air only	\$1,024.92
Accommodation only	\$593.00
Accommodation w/ daily meal only	\$161.51
Food & Beverages in Hotel	\$247.72
Ground transportation – Japan	\$42.38
Ground transportation – Guam	\$72.68
Optional tours/ activities	\$219.19
Other expenses	\$275.78
Total Prepaid	\$1,033.49

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=40

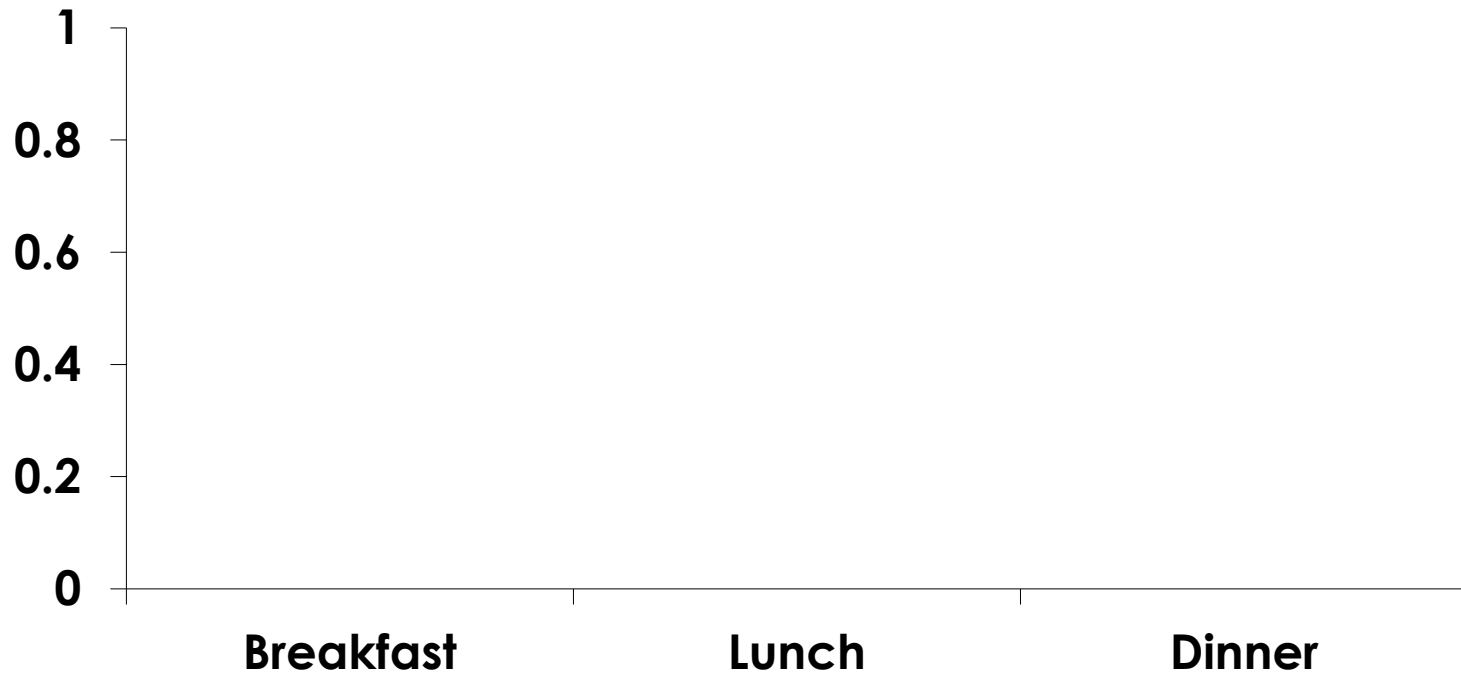


Mean=1,535.38 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

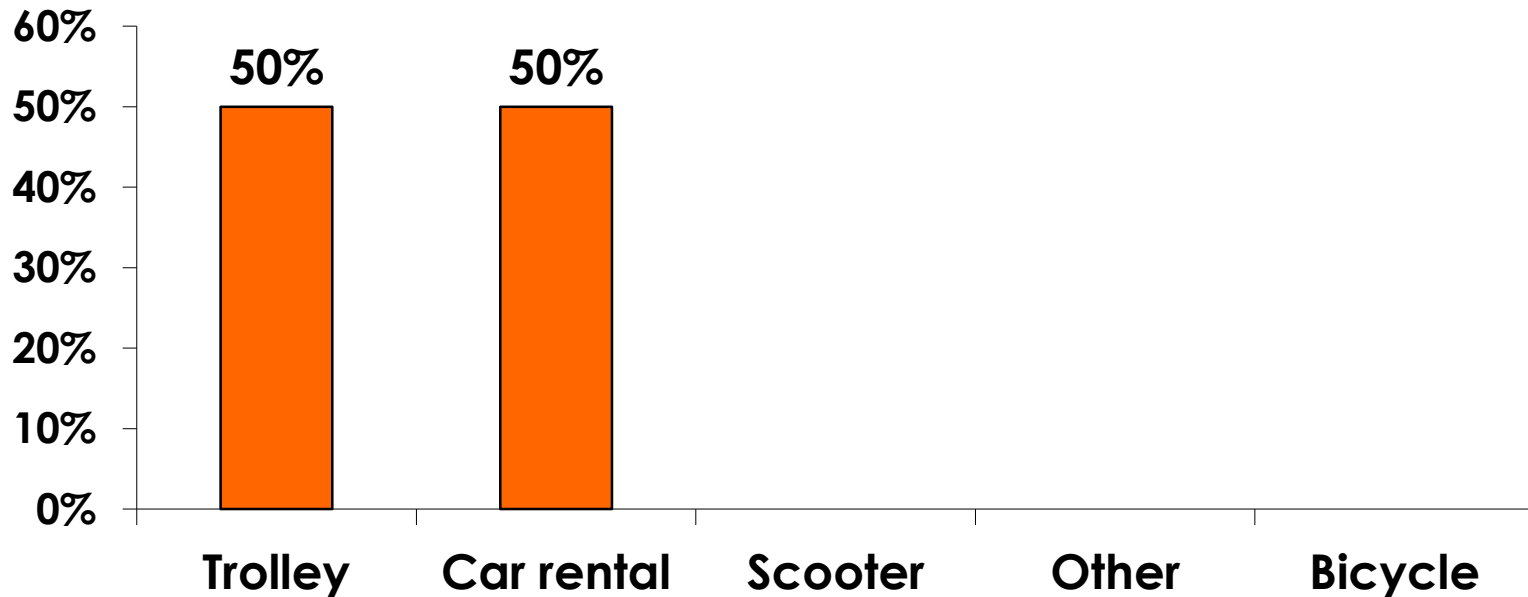
n= (none recorded)



Mean=\$161.51 per travel party

PREPAID GROUND TRANSPORTATION

n=2



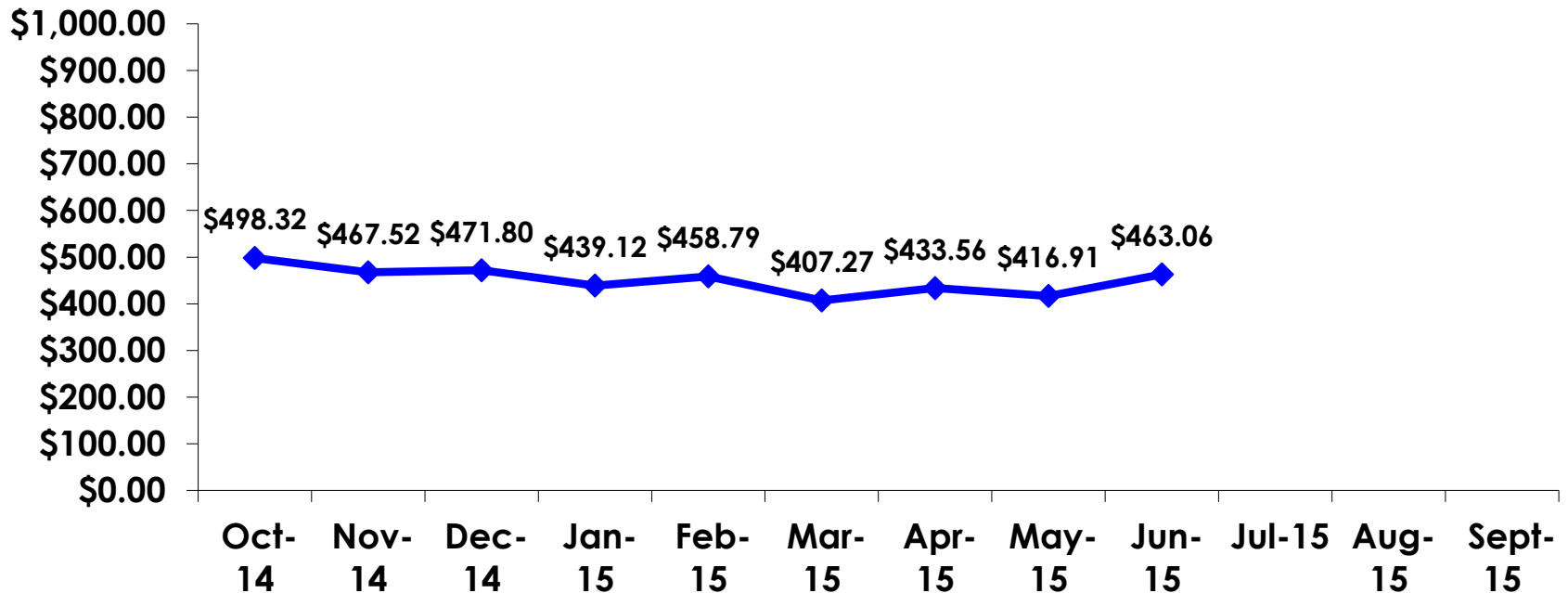
Mean=\$72.68 per travel party

On-Island Expenditures

- \$741.86 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$9,000 = Maximum (highest amount recorded for the entire sample)
- \$463.06 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

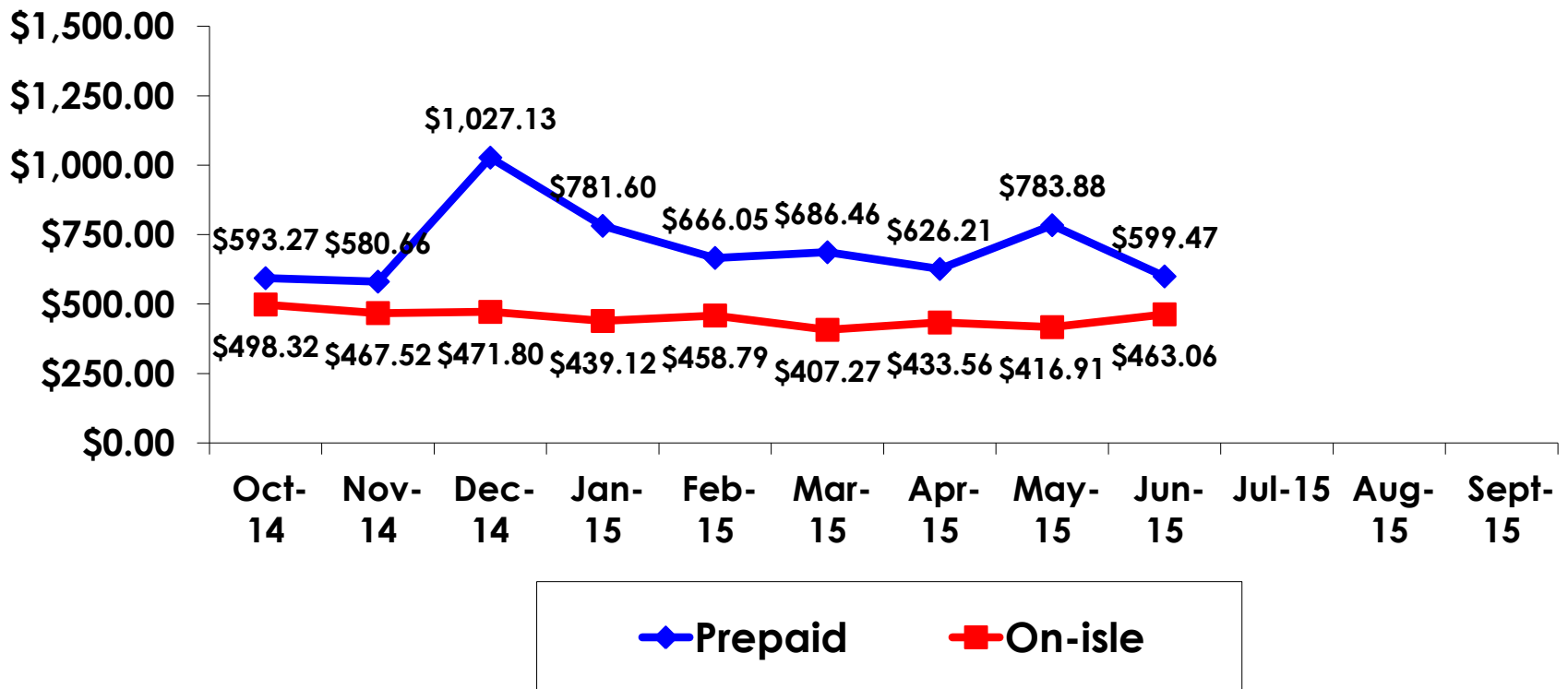


YTD = \$450.66

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$704.99

On-Isle YTD = \$450.66



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	\$463.06	\$441.19	\$482.81	\$299.05	\$495.26	\$443.93	\$426.86	\$414.87	\$422.13	\$731.27	\$675.71
	Median	\$350	\$313	\$400	\$300	\$350	\$300	\$350	\$338	\$380	\$503	\$550
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$215
	Maximum	\$3,500	\$3,000	\$3,500	\$750	\$3,000	\$2,000	\$1,050	\$2,500	\$1,700	\$3,500	\$1,550

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$36.10	\$50.32	\$23.27	\$7.72	\$31.34	\$46.29	\$80.49
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$27.28	\$28.41	\$26.26	\$17.85	\$22.95	\$42.53	\$29.07
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$84.25	\$89.43	\$79.57	\$52.93	\$61.79	\$142.41	\$104.65
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$20
OPT TOUR	Mean	\$63.14	\$65.84	\$60.70	\$47.20	\$55.05	\$82.53	\$81.16
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$194.30	\$240.35	\$152.74	\$80.28	\$201.57	\$275.90	\$198.84
	Median	\$10	\$0	\$12	\$0	\$30	\$0	\$100
GIFT- OTHER	Mean	\$98.91	\$102.33	\$95.82	\$65.59	\$81.34	\$134.82	\$147.91
	Median	\$30	\$20	\$30	\$30	\$22	\$0	\$100
TRANS	Mean	\$15.93	\$14.80	\$16.96	\$3.10	\$9.01	\$35.80	\$23.77
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$221.02	\$248.57	\$196.16	\$170.54	\$182.05	\$341.53	\$212.28
	Median	\$0	\$10	\$0	\$0	\$0	\$0	\$30
TOTAL	Mean	\$741.86	\$842.93	\$650.63	\$444.56	\$646.84	\$1,101.81	\$880.49
	Median	\$500	\$500	\$480	\$350	\$450	\$750	\$700

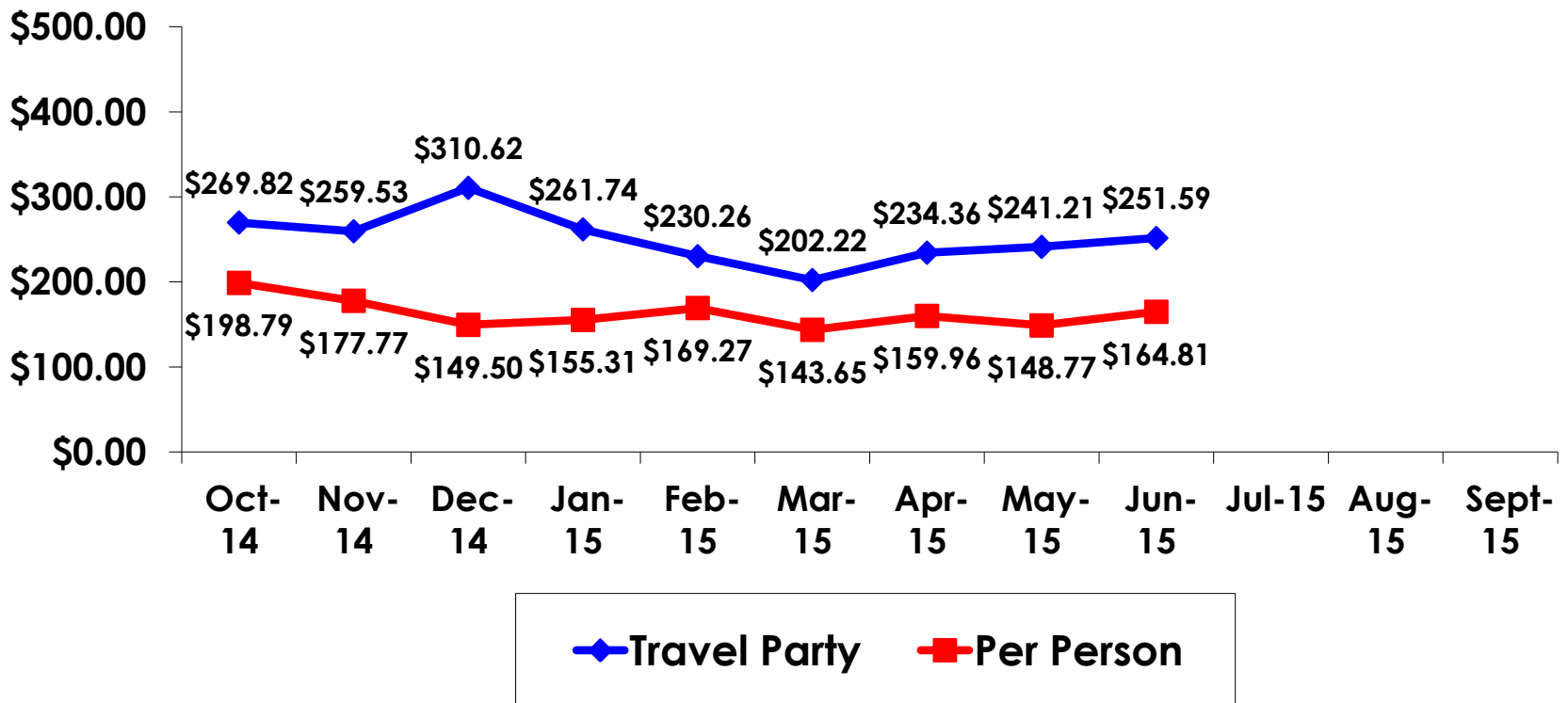
On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$36.10	\$39.19	\$32.80
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$27.28	\$25.55	\$29.43
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$84.25	\$79.91	\$89.71
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$63.14	\$60.58	\$66.44
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$194.30	\$118.12	\$282.35
	Median	\$10	\$0	\$34
GIFT- OTHER	Mean	\$98.91	\$87.69	\$112.30
	Median	\$30	\$0	\$45
TRANS	Mean	\$15.93	\$16.27	\$15.65
	Median	\$0	\$0	\$0
OTHER	Mean	\$221.02	\$202.49	\$241.68
	Median	\$0	\$0	\$0
TOTAL	Mean	\$741.86	\$628.86	\$873.40
	Median	\$500	\$480	\$563

ON-ISLE EXPENDITURES – Per Day

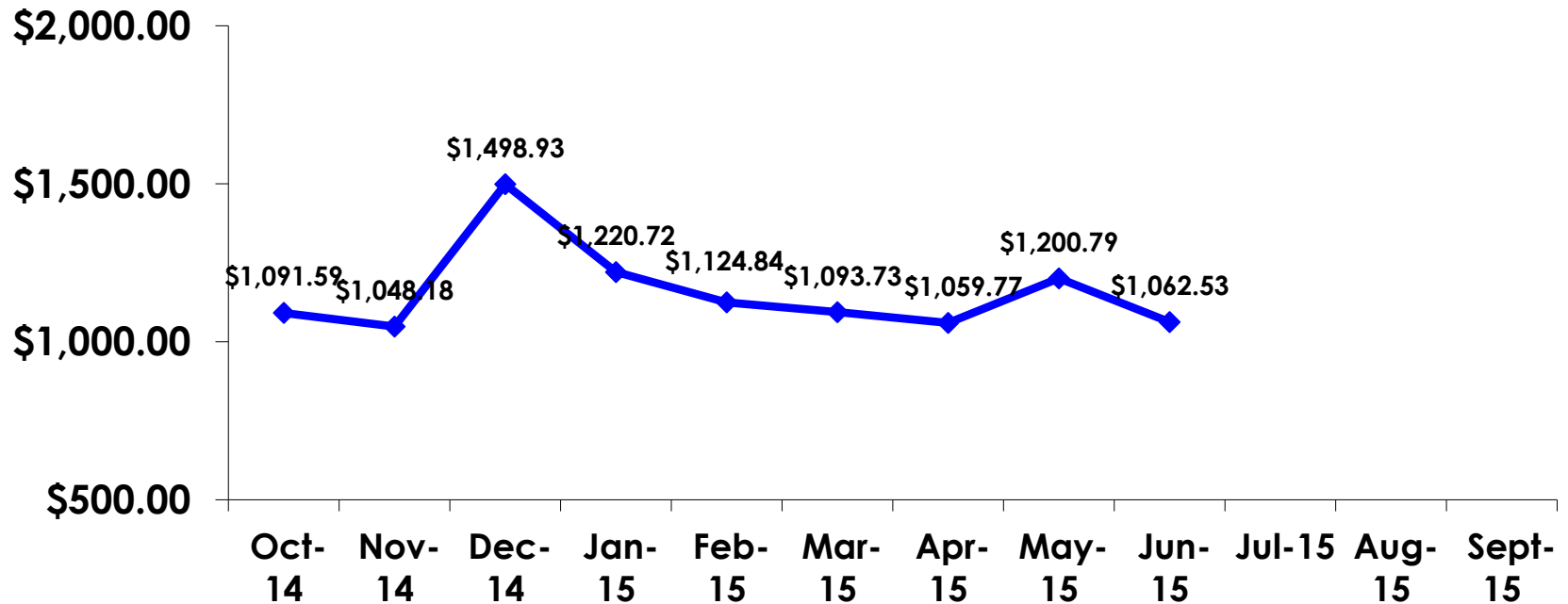
Travel Party YTD = \$251.22 Per Person YTD = \$163.06



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,062.53 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,264 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



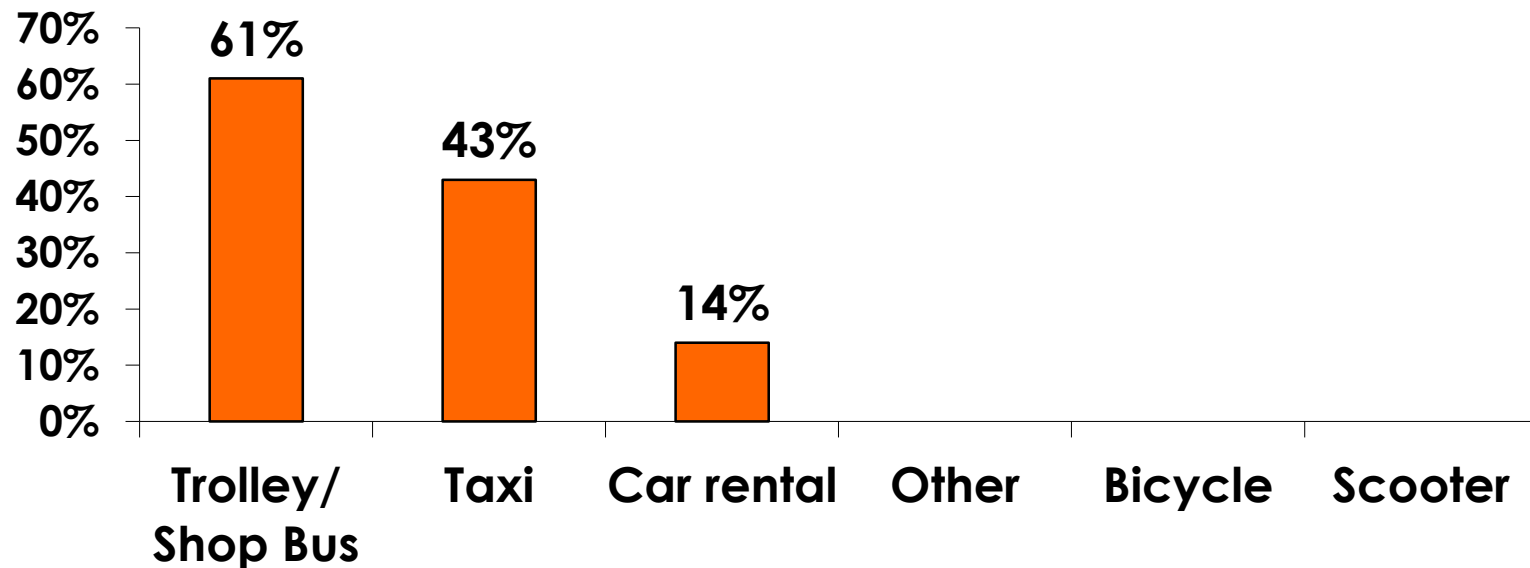
YTD=\$1,155.65

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$36.10
Food & beverage in fast food restaurant/convenience store	\$27.28
Food & beverage at restaurants or drinking establishments outside a hotel	\$84.25
Optional tours and activities	\$63.14
Gifts/ souvenirs for yourself/companions	\$194.30
Gifts/ souvenirs for friends/family at home	\$98.91
Local transportation	\$15.93
Other expenses not covered	\$221.02
Average Total	\$741.86

Local Transportation

n=70



Mean=\$15.93 per travel party

Guam Airport Expenditures

- \$25.90 = Mean
- \$10 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$500 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

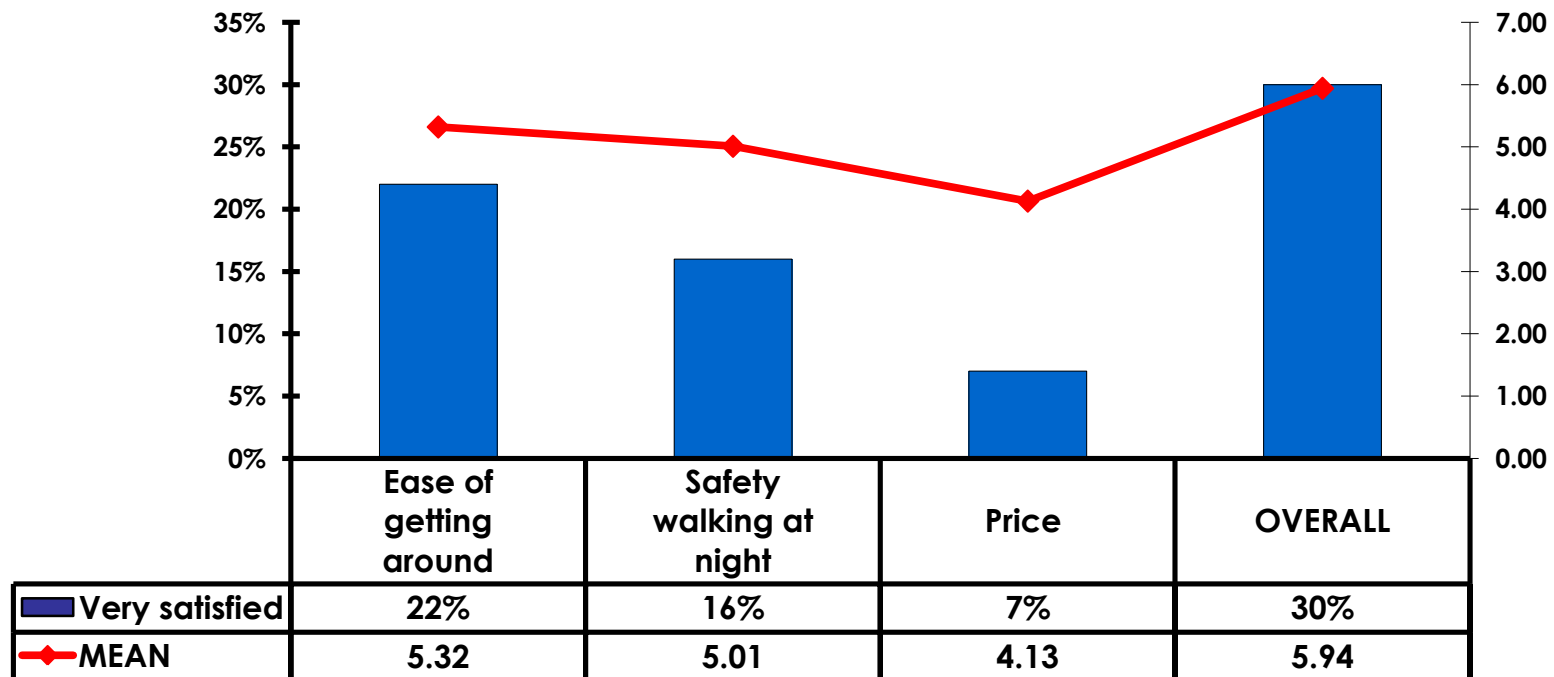
	MEAN \$
Food & Beverages	\$8.59
Gifts/Souvenirs Self	\$9.71
Gifts/Souvenirs Others	\$8.66
Total	\$25.90

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

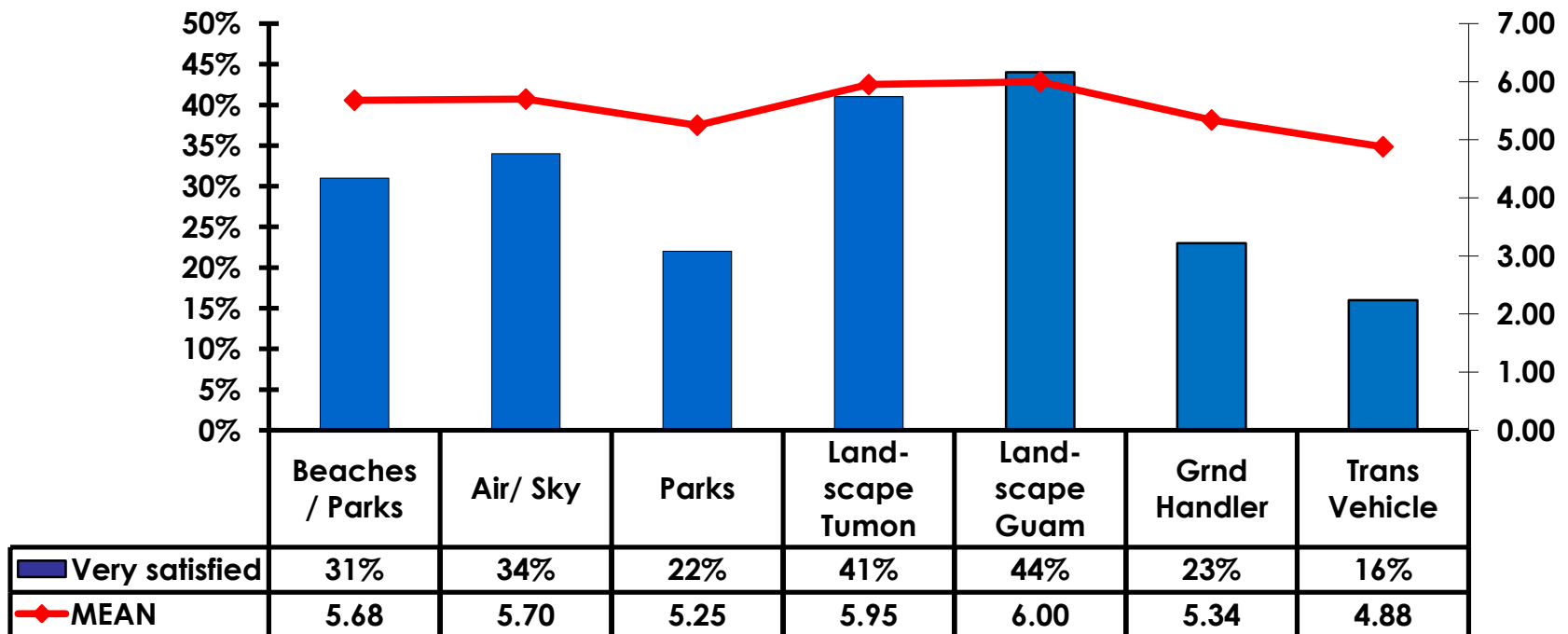
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

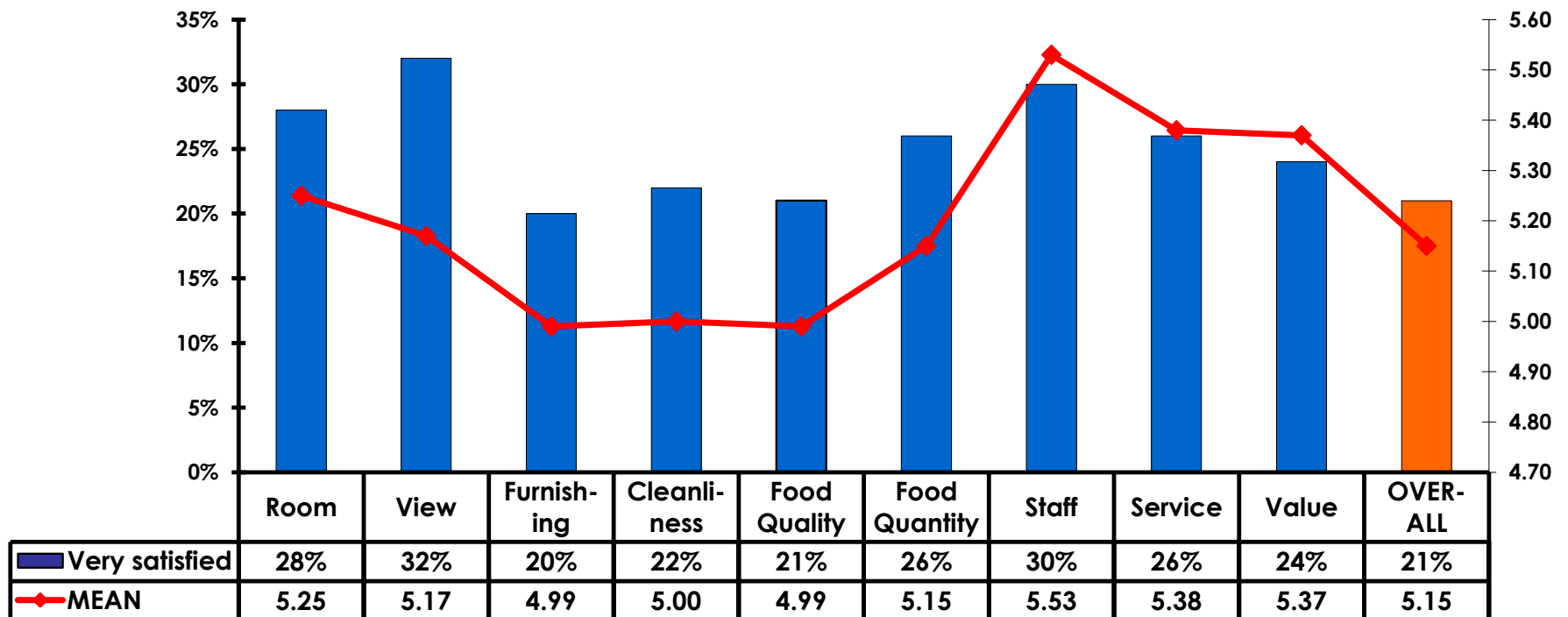
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

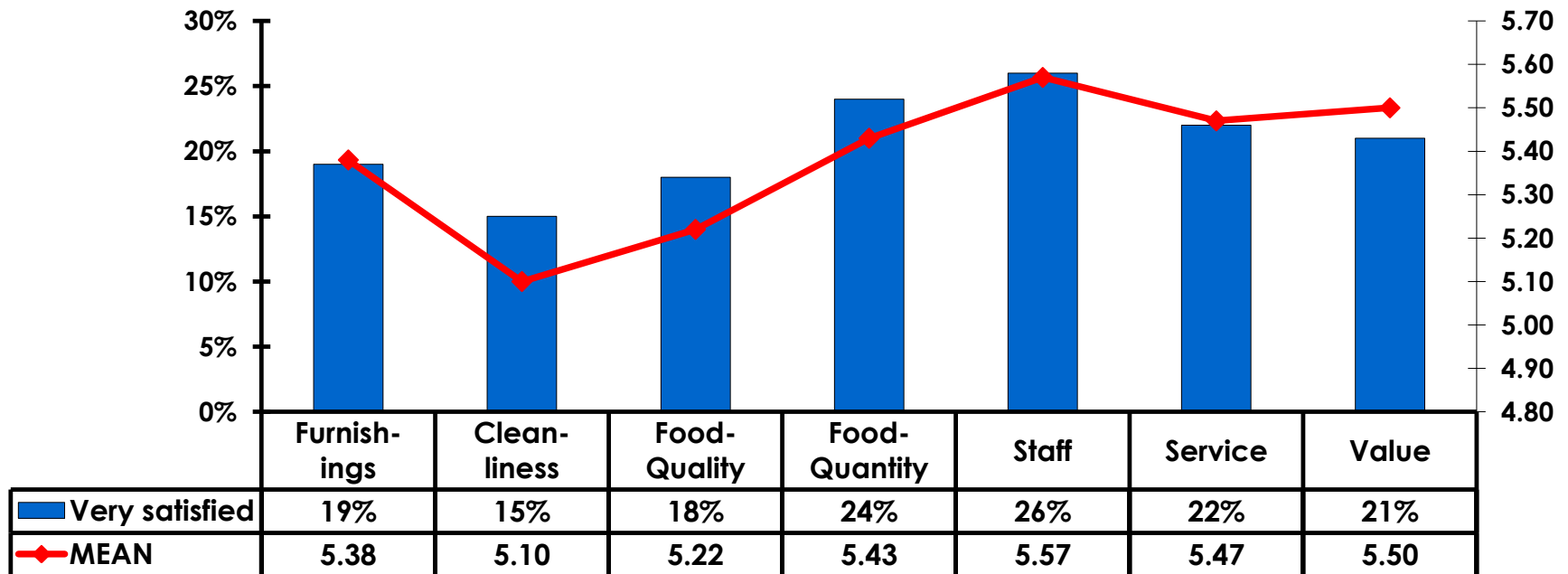
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

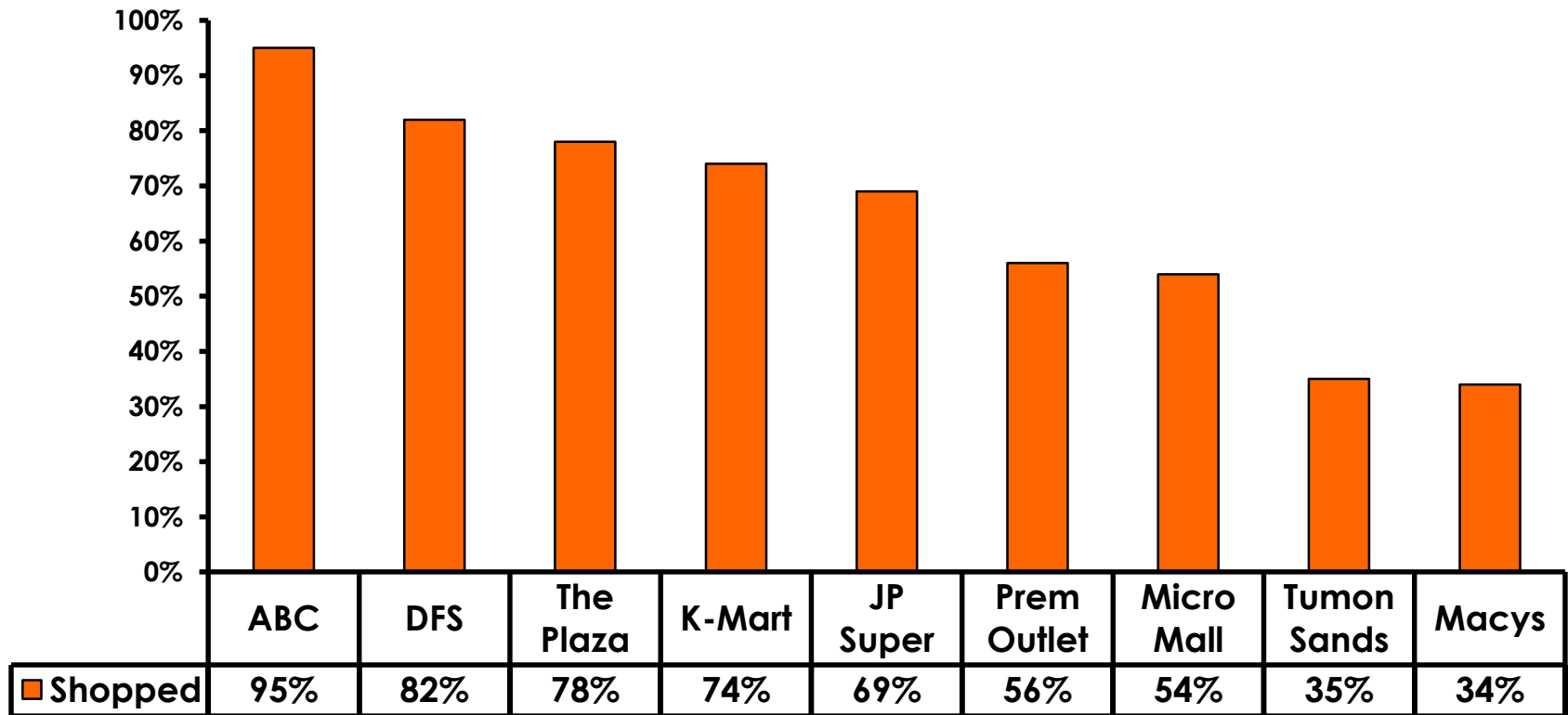
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



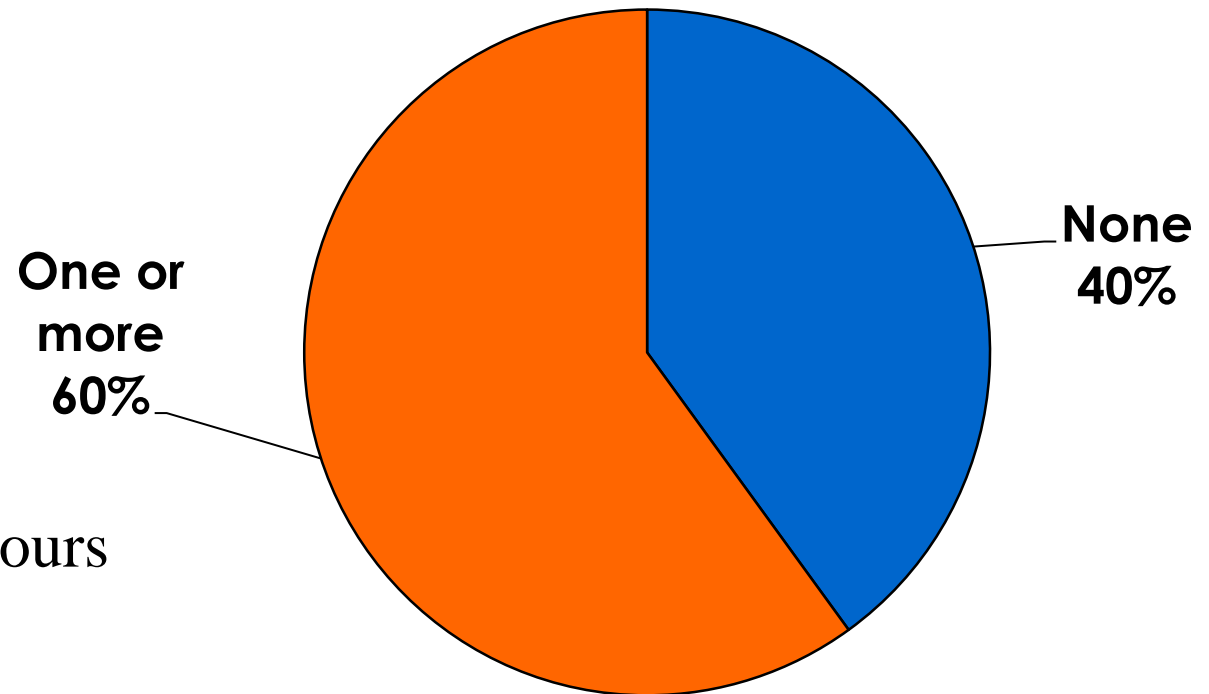
Satisfaction with Shopping

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 = 44%
Score of 4 to 5 = 47%	Score of 4 to 5 = 47%
Score 1 to 3 = 7%	Score 1 to 3 = 10%
MEAN = 5.22	MEAN = 5.09

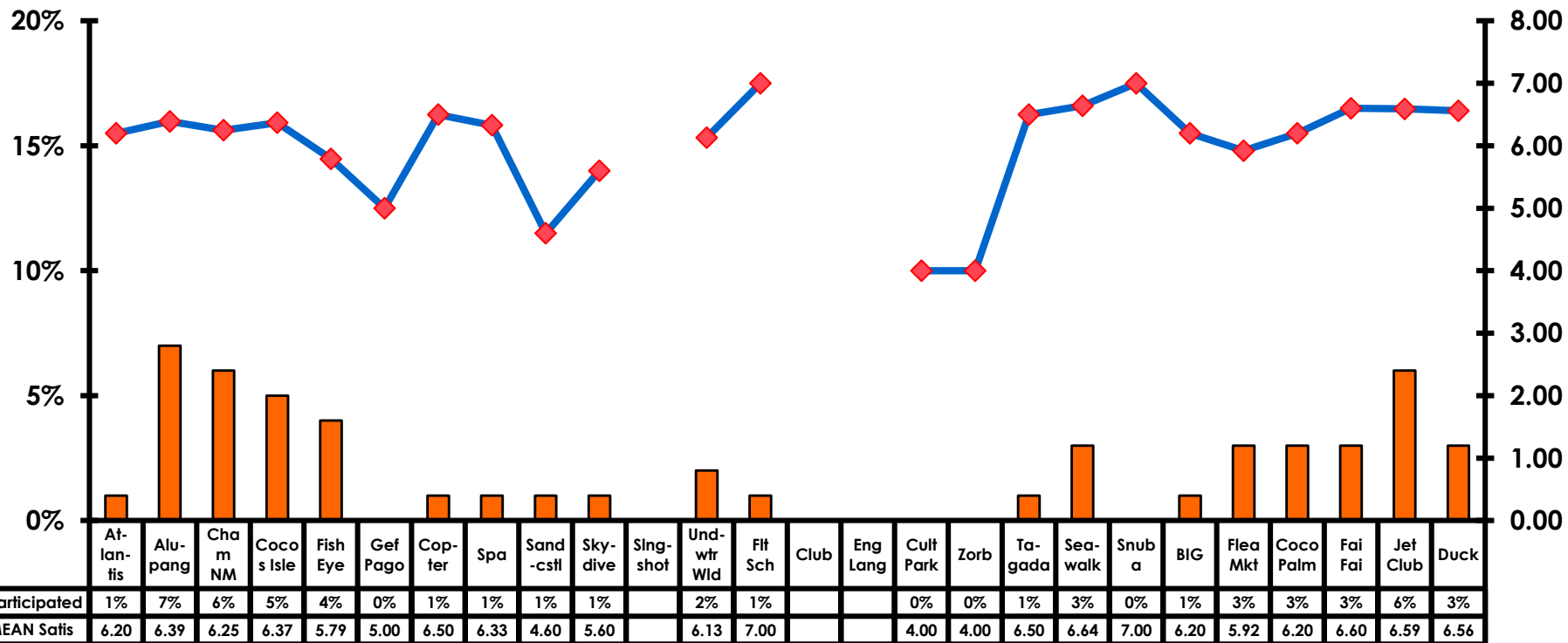
Optional Tour Participation



- 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 = 60%	Score of 6 to 7 = 54%
Score of 4 to 5 = 40%	Score of 4 to 5 = 45%
Score 1 to 3 = 1%	Score 1 to 3 = 0%
MEAN = 5.55	MEAN = 5.44

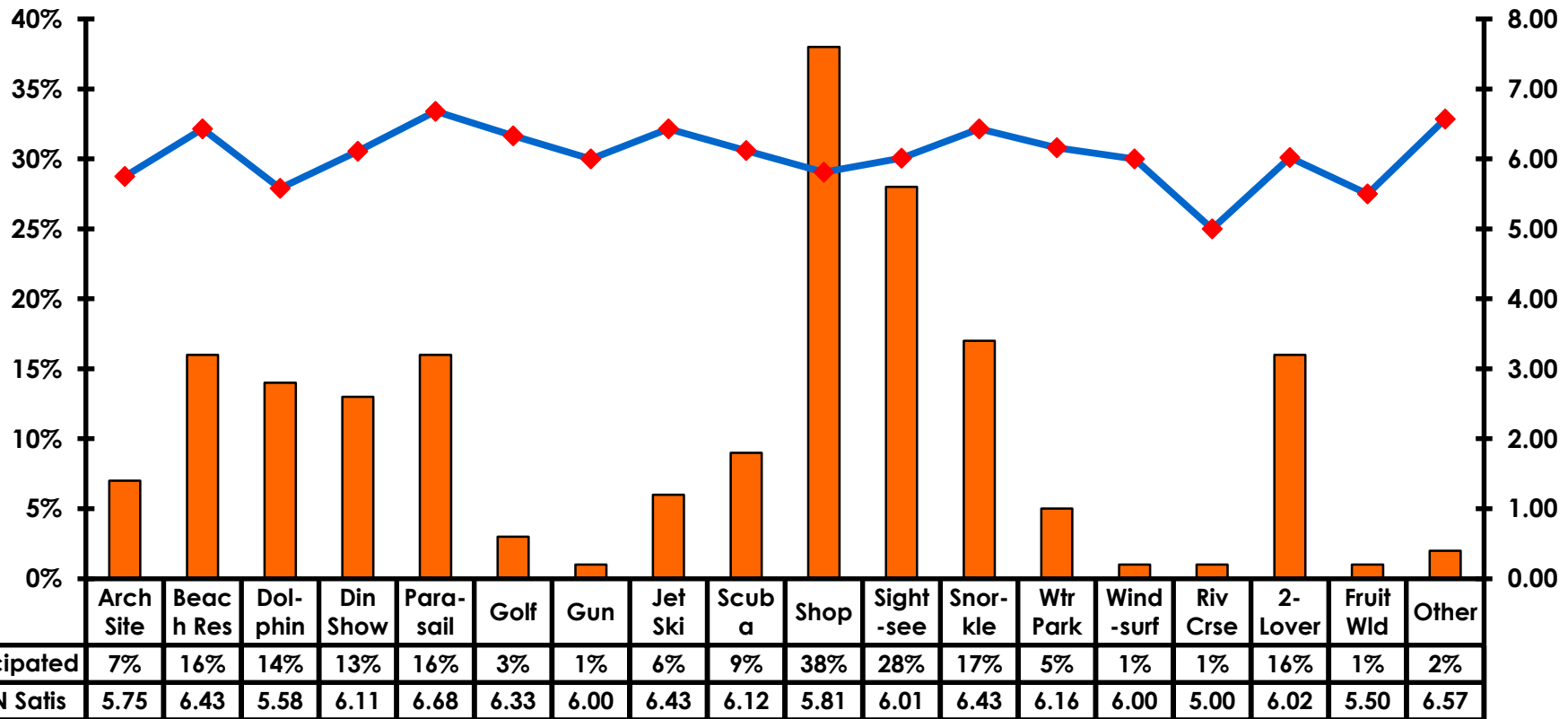
Night Tours Satisfaction

7pt Rating Scale

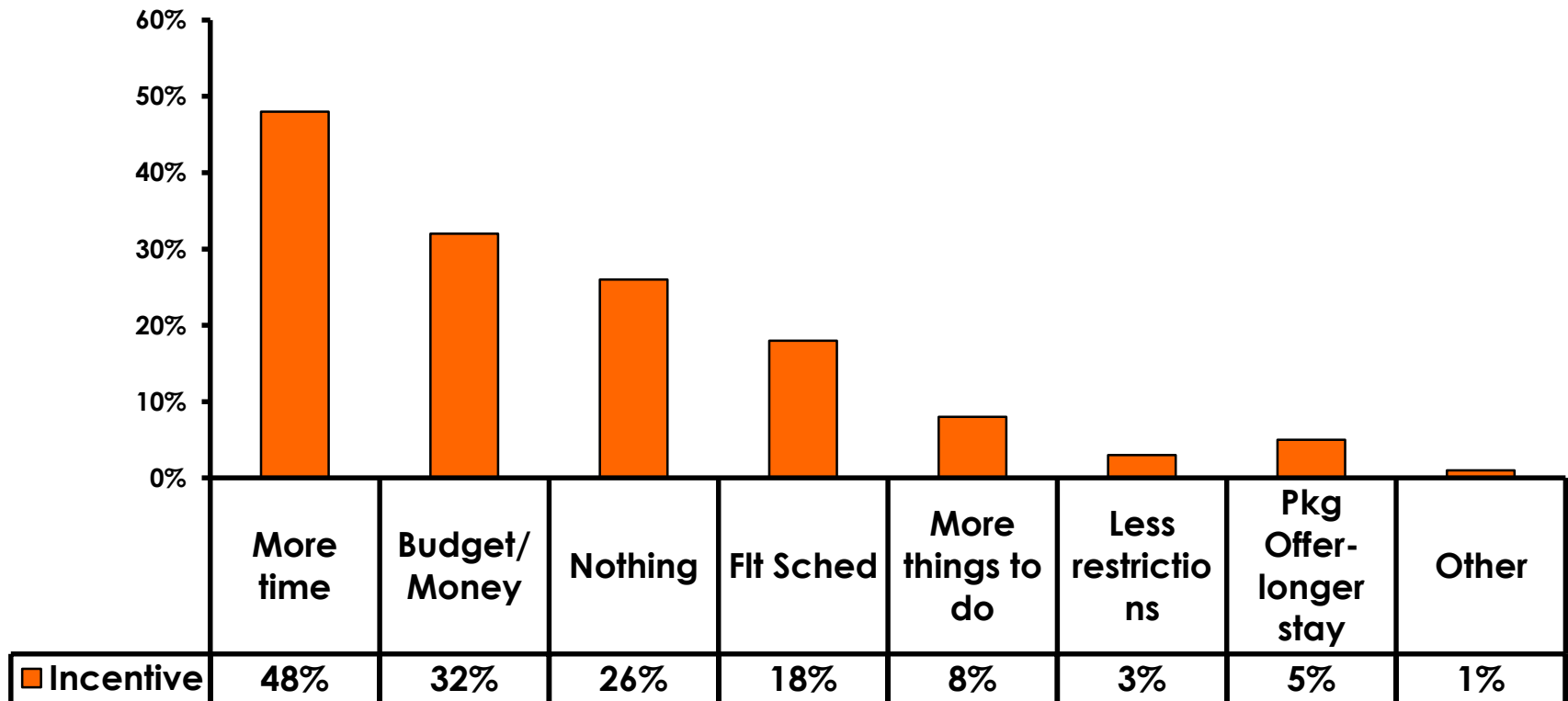
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 32%	Score of 6 to 7 = 26%
Score of 4 to 5 = 68%	Score of 4 to 5 = 74%
Score 1 to 3 = 0%	Score 1 to 3 = 0%
MEAN = 4.86	MEAN = 4.73

Satisfaction with Other Activities



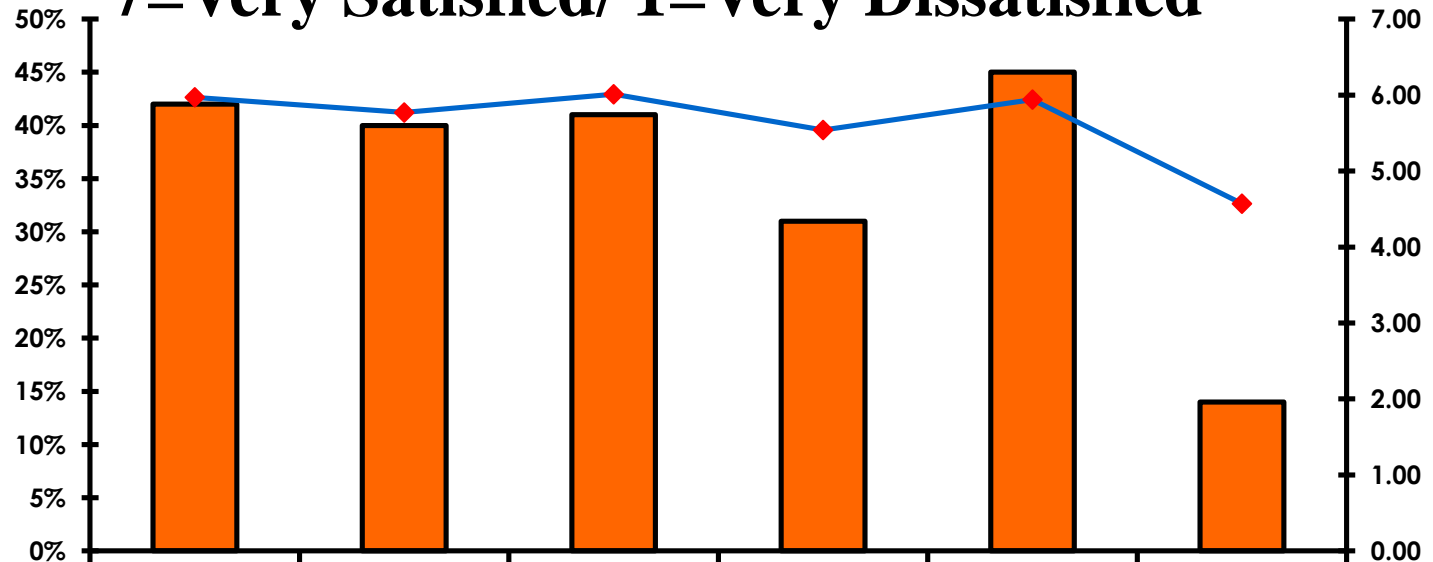
What would it take to make you want to stay an extra day in Guam?





On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

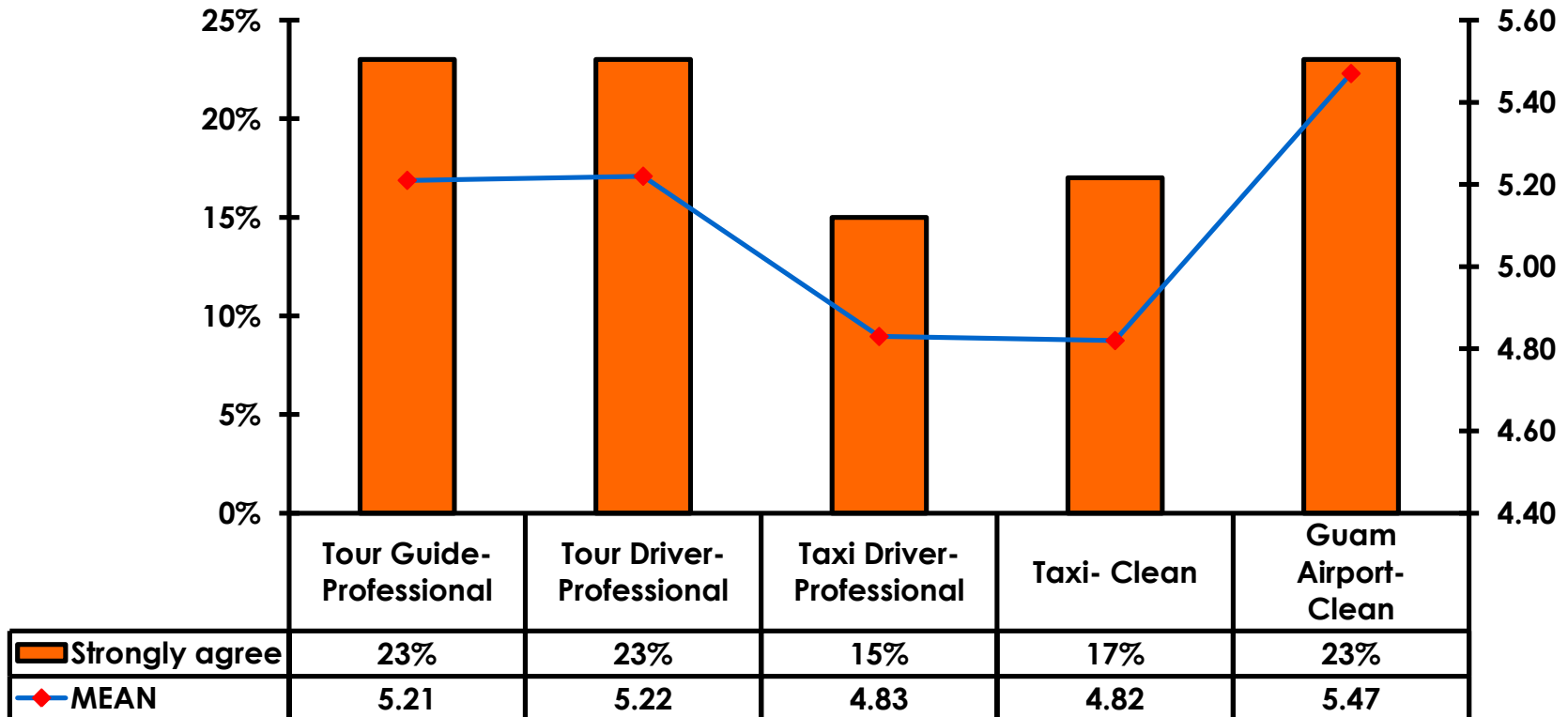


 Strongly agree	42%	40%	41%	31%	45%	14%
 MEAN	5.97	5.77	6.01	5.54	5.94	4.57

On-Island Perceptions

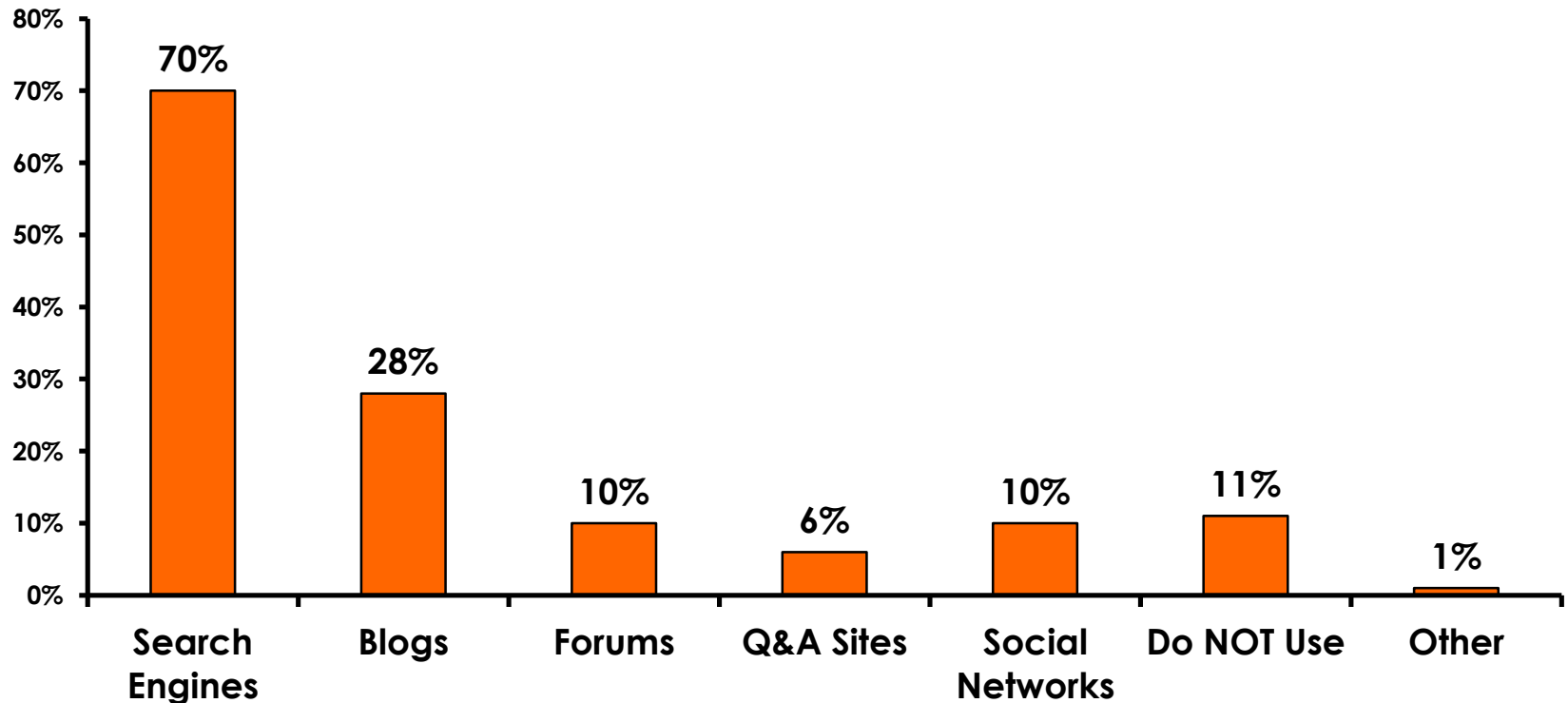
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



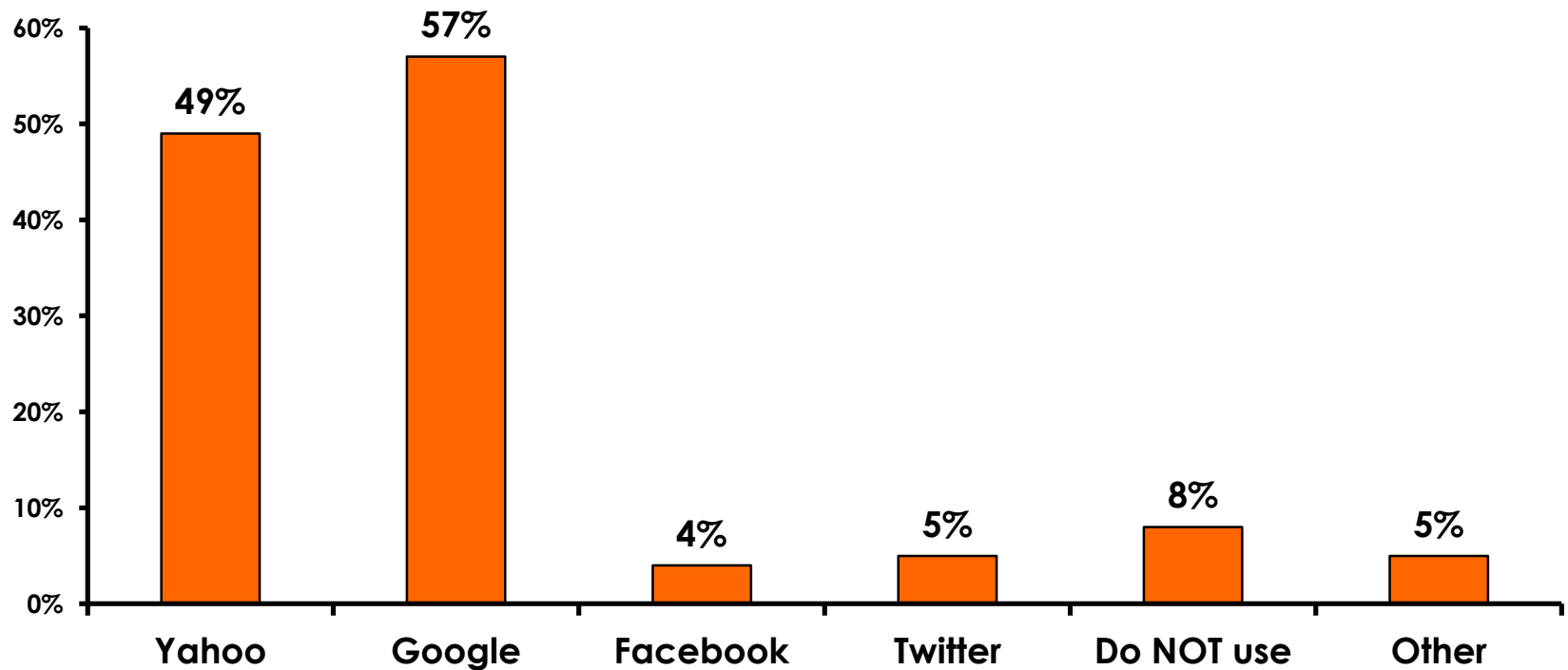
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

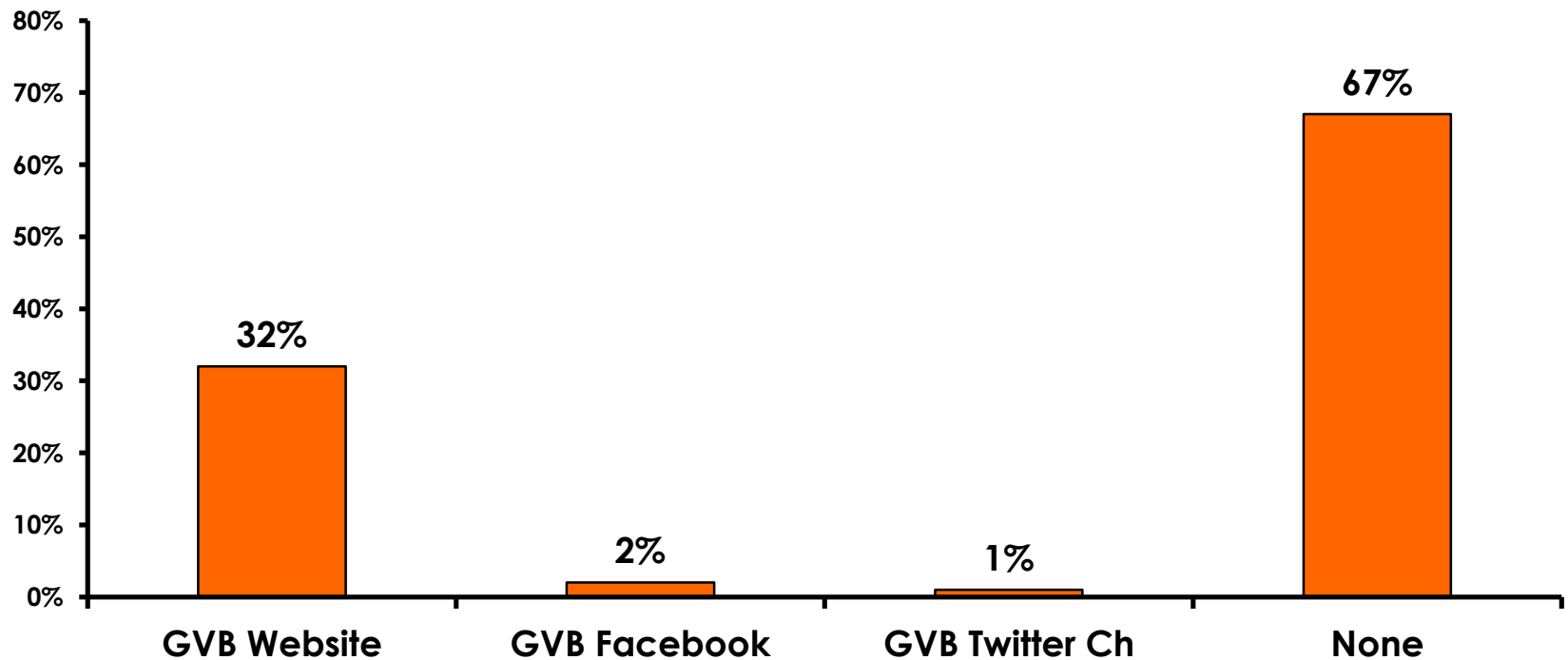


Internet- Things To Do

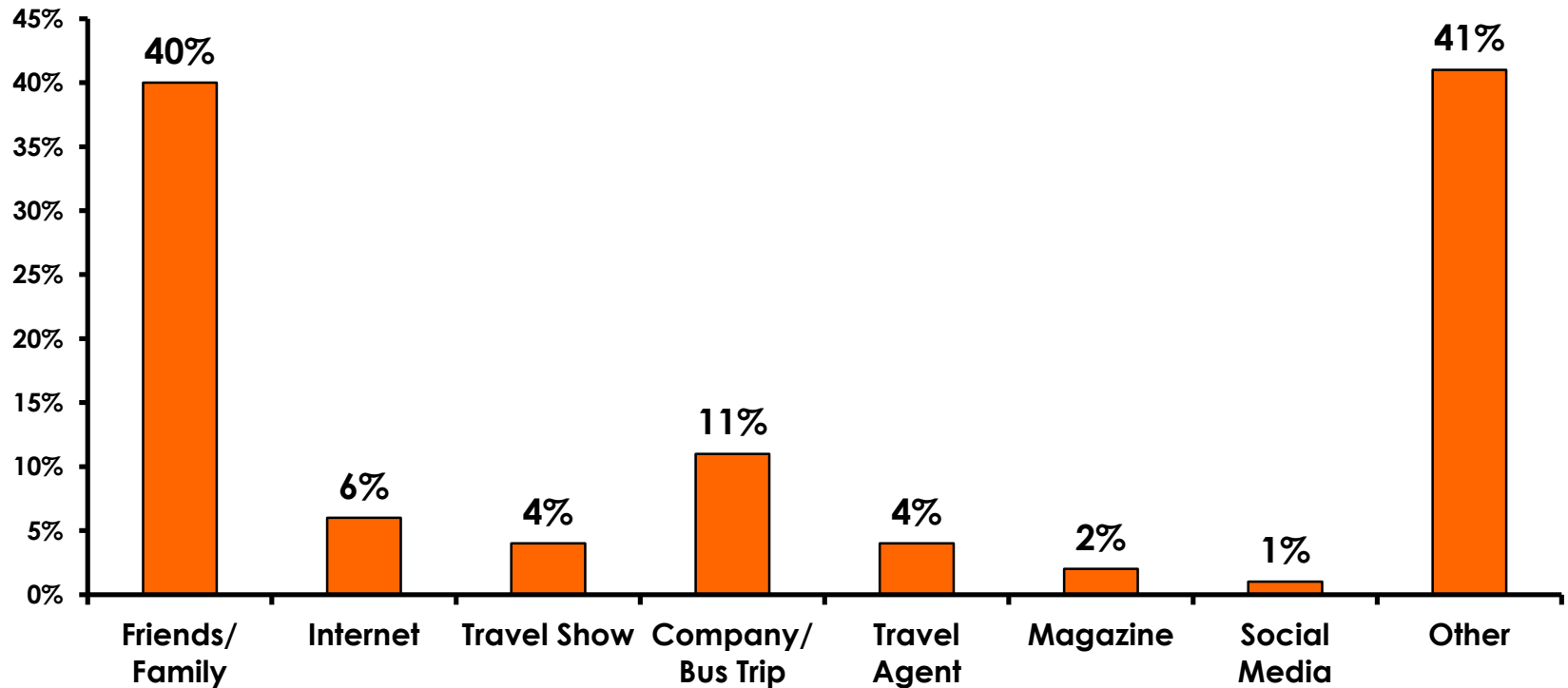
Sources of Info



Internet- GVB Sources

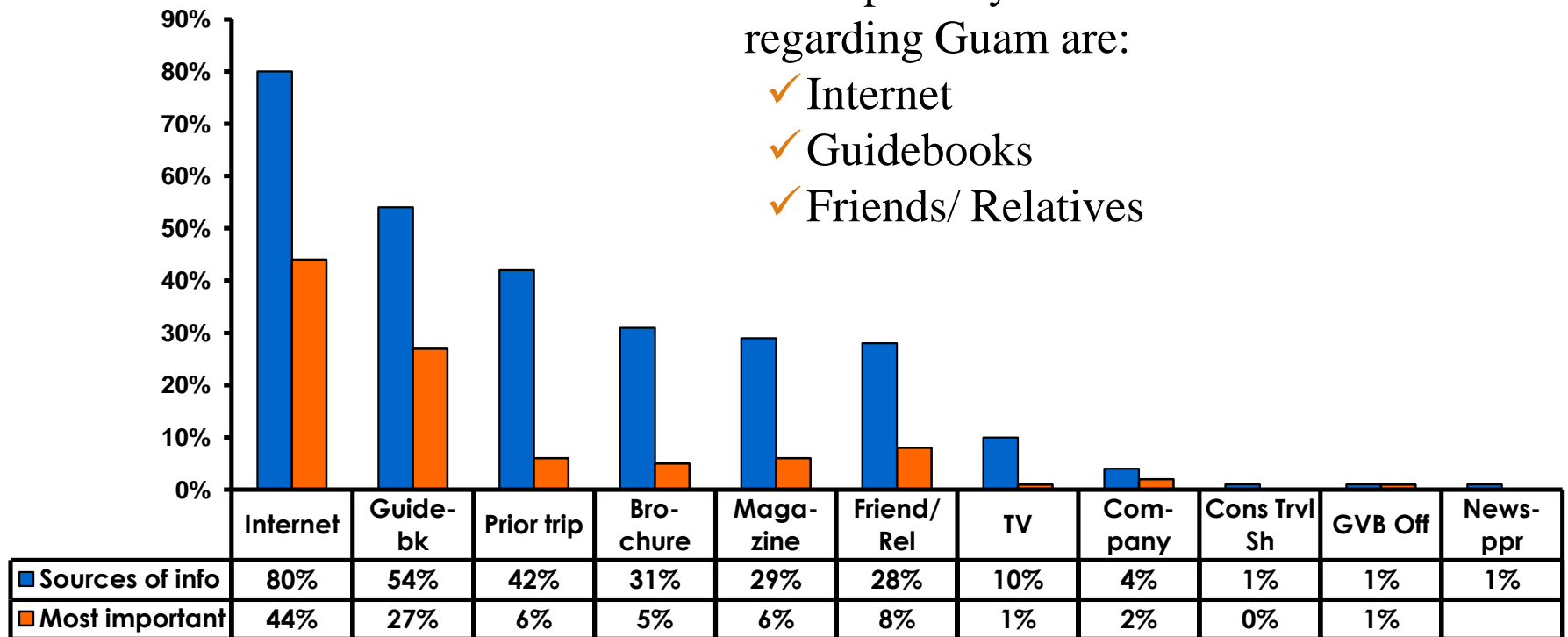


Travel Motivation- Info Sources



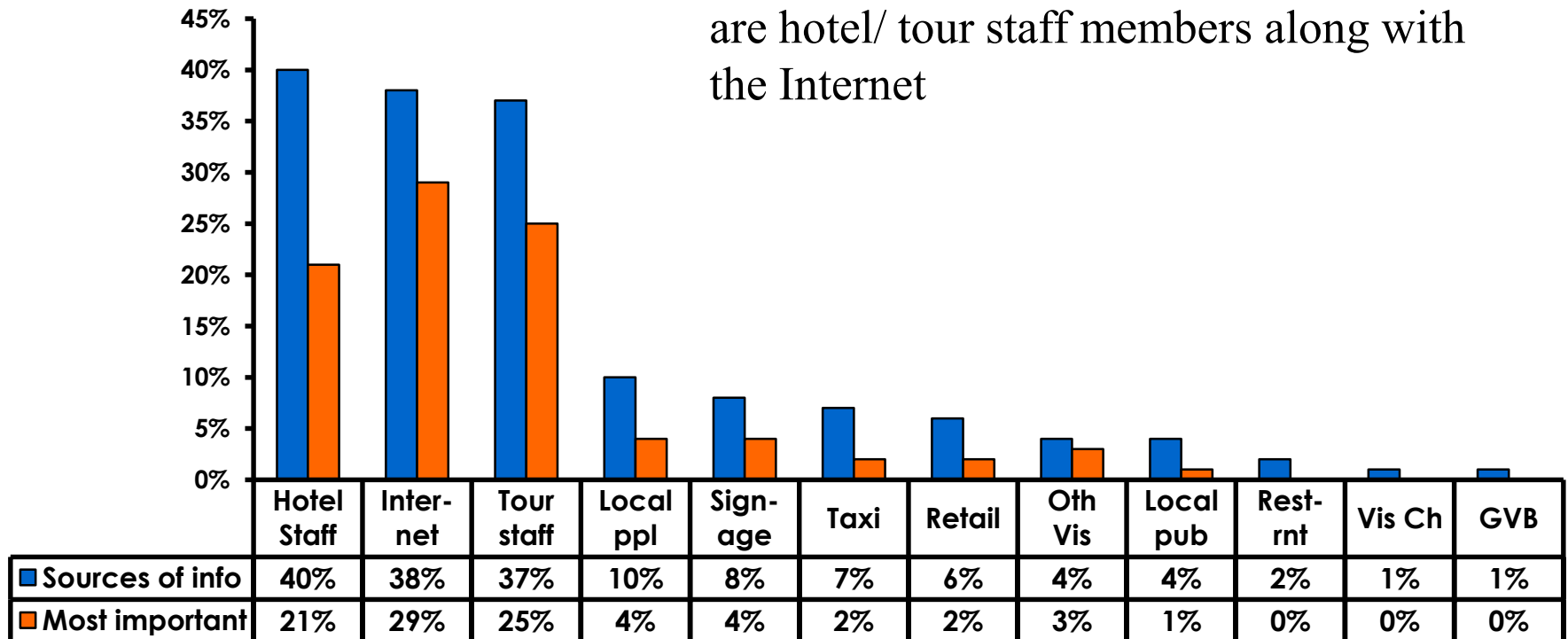
Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
 - ✓ Internet
 - ✓ Guidebooks
 - ✓ Friends/ Relatives



Sources of Information Post-arrival

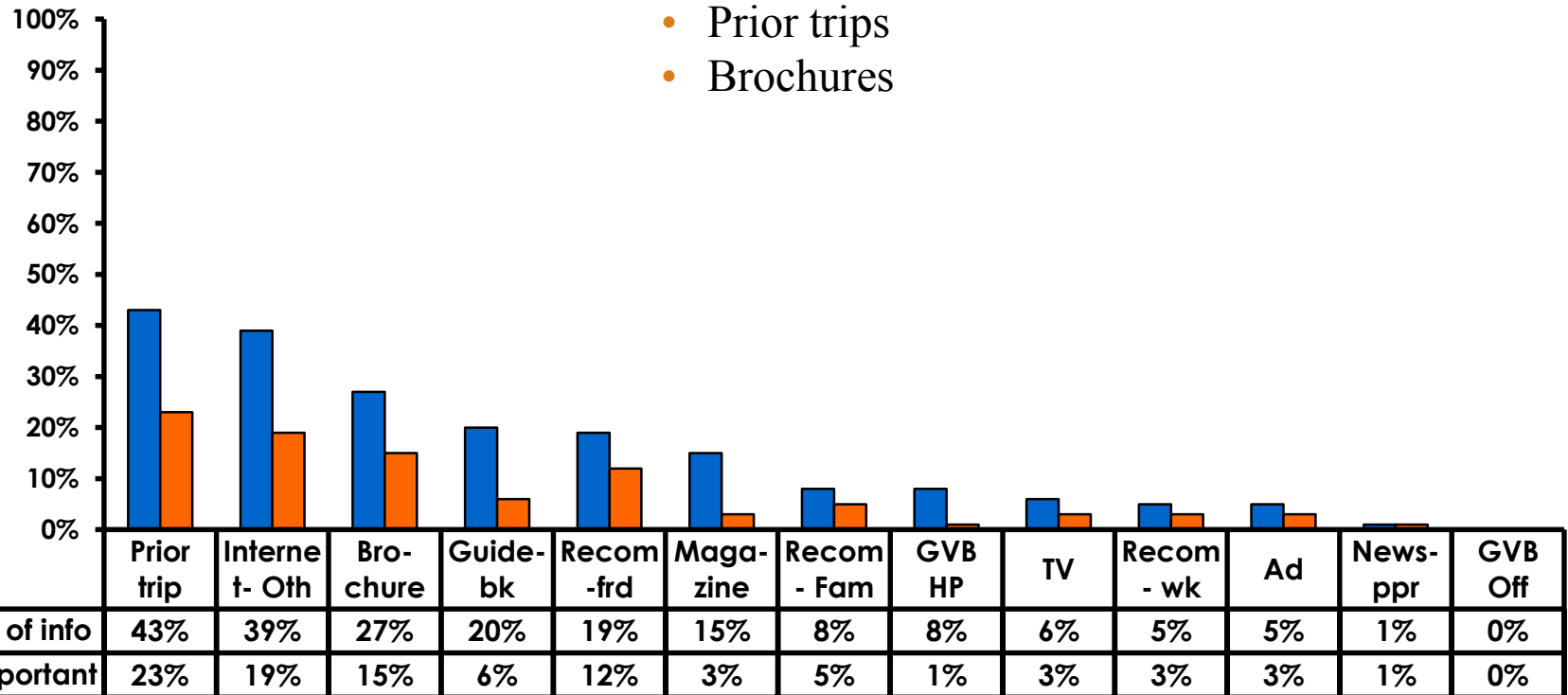
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

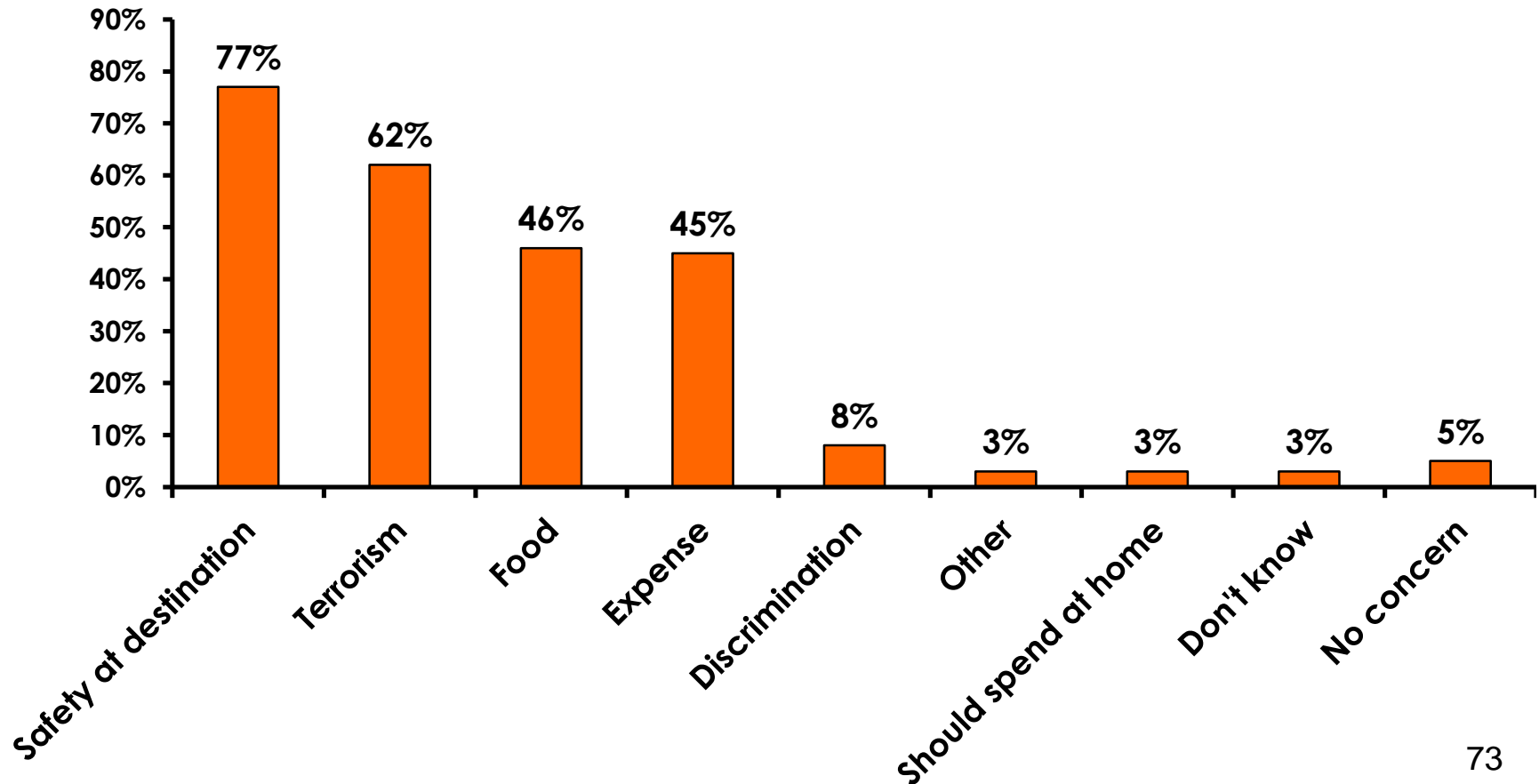
The primary motivational sources of information were.

- Internet sites
- Prior trips
- Brochures



SECTION 6 **OTHER ISSUES**

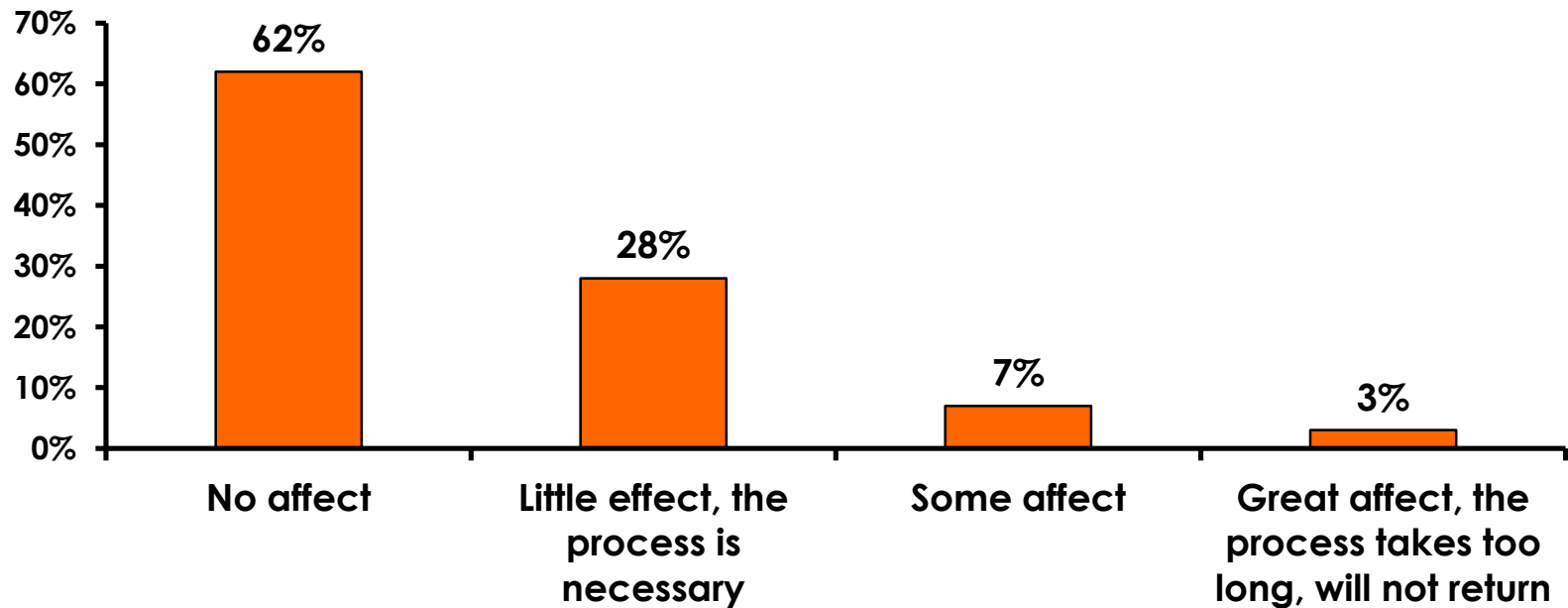
Concerns about travel outside of Japan - Overall



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	77%	85%	76%	71%	77%	78%	83%	69%	79%	76%	84%	76%	67%	
	Terrorism	62%	52%	62%	65%	70%	44%	65%	65%	57%	67%	67%	64%	33%	
	Food	46%	42%	53%	35%	51%	56%	43%	45%	54%	47%	42%	48%	33%	
	Expense	45%	54%	45%	41%	40%	56%	52%	41%	43%	49%	47%	36%	33%	
	Discrimination against Japanese	8%	8%	9%	4%	9%	22%	13%	6%	5%	2%	7%	10%		
	No concerns	5%	4%	5%	4%	7%		7%	6%	7%	4%	7%	2%		
	Other	3%	1%	3%	6%	2%			2%	3%	5%	2%	10%		
	Don't know	3%	3%	3%	2%	2%		2%	4%		2%		2%		
	Should spend at home	3%	3%	3%	2%			4%	2%	3%		2%	5%		
	Total	Count	351	71	154	83	43	9	46	51	61	55	43	42	3

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

