



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2014

MARCH 2014



Prepared by: QMark Research

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Background & Methodology

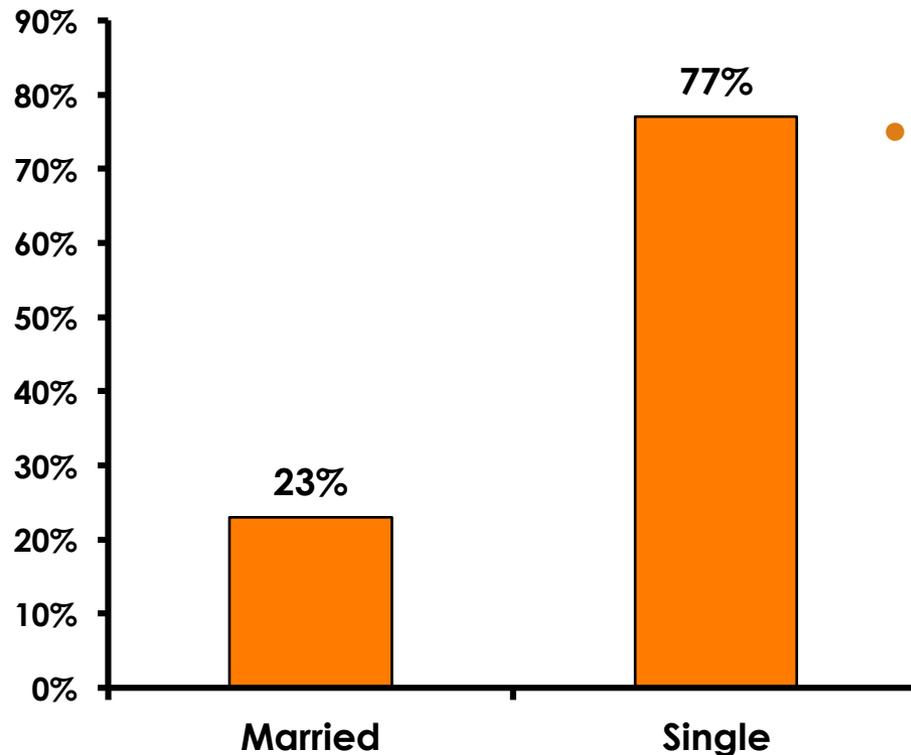
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing 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 **351** 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.

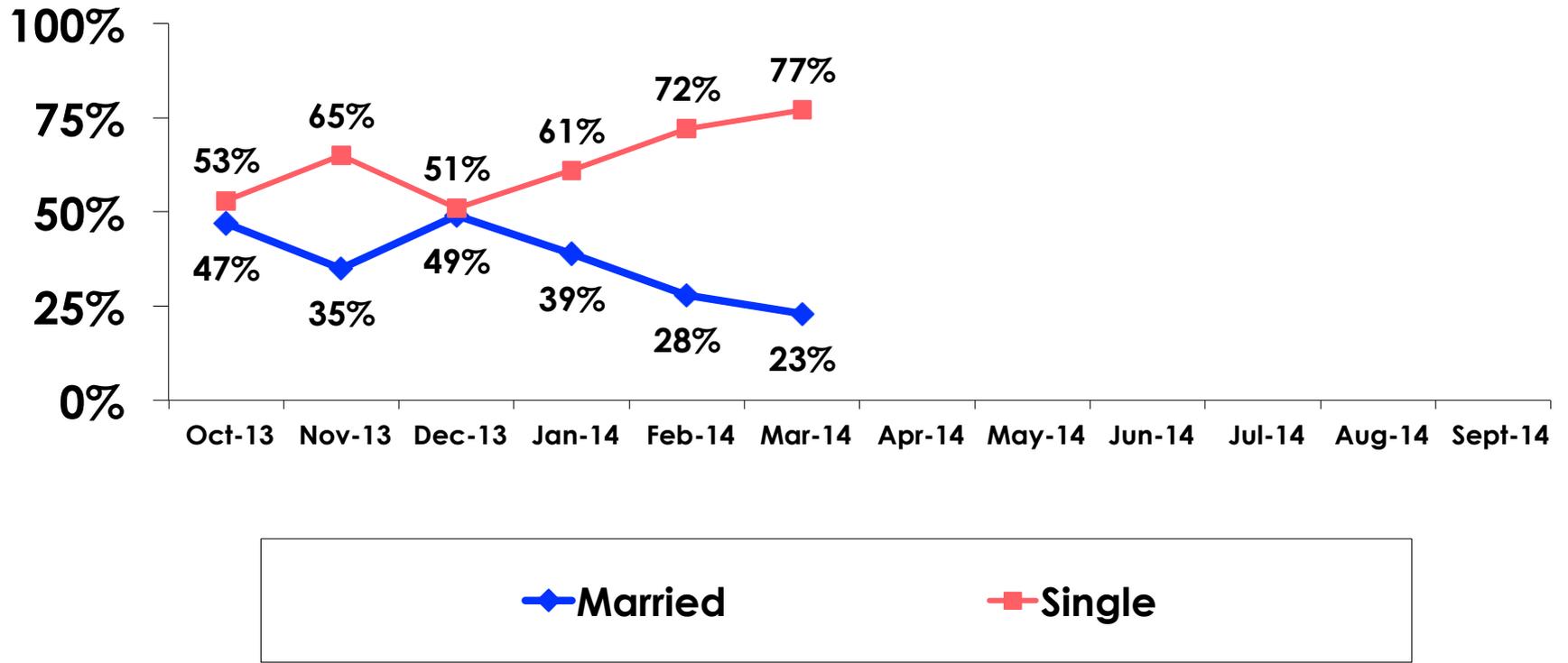
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

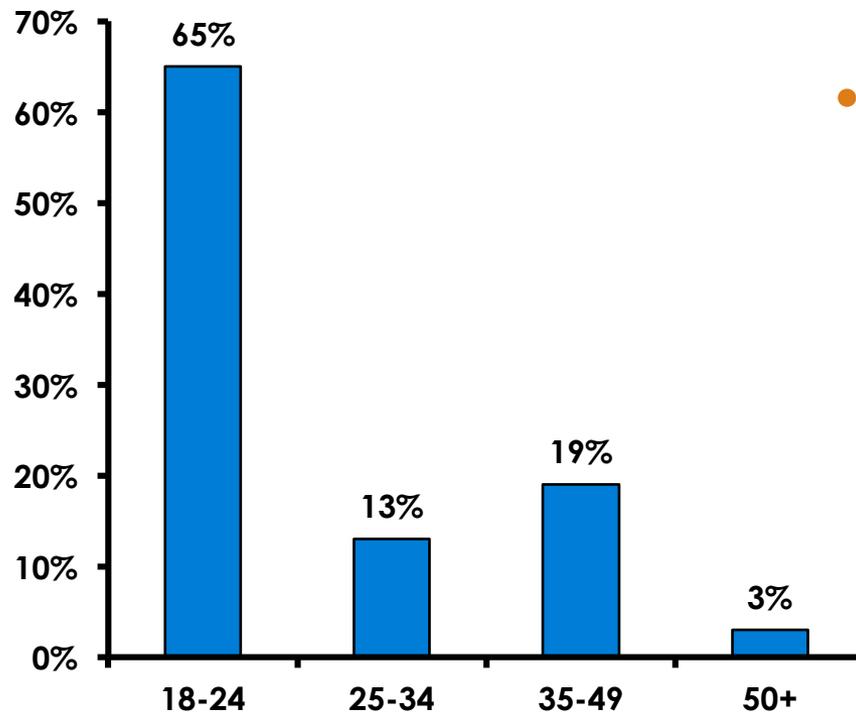


- Half (46%) of repeat visitors are married.

Marital Status

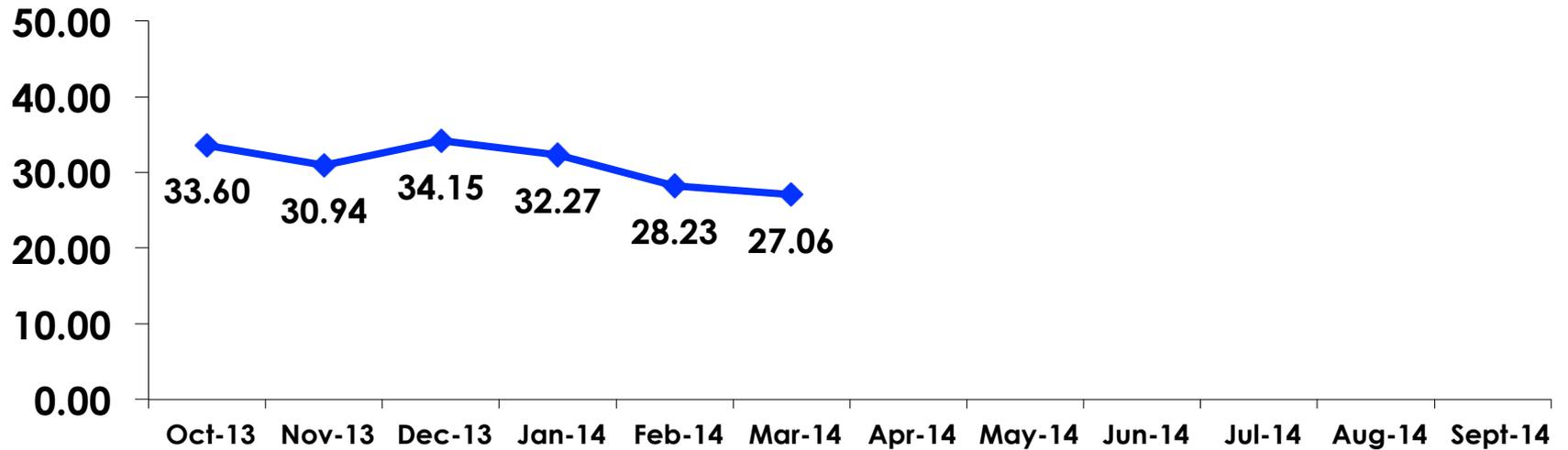


Age - Overall

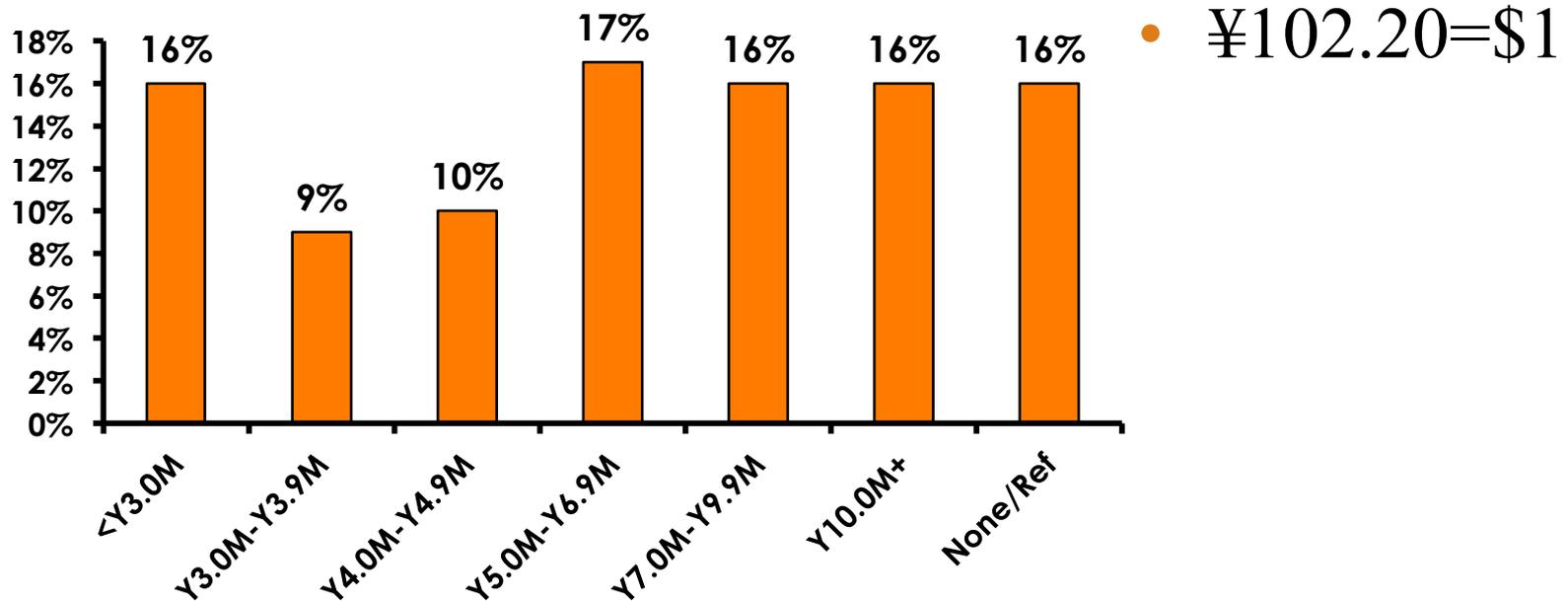


- The average age of the respondents is 27.06 years of age.

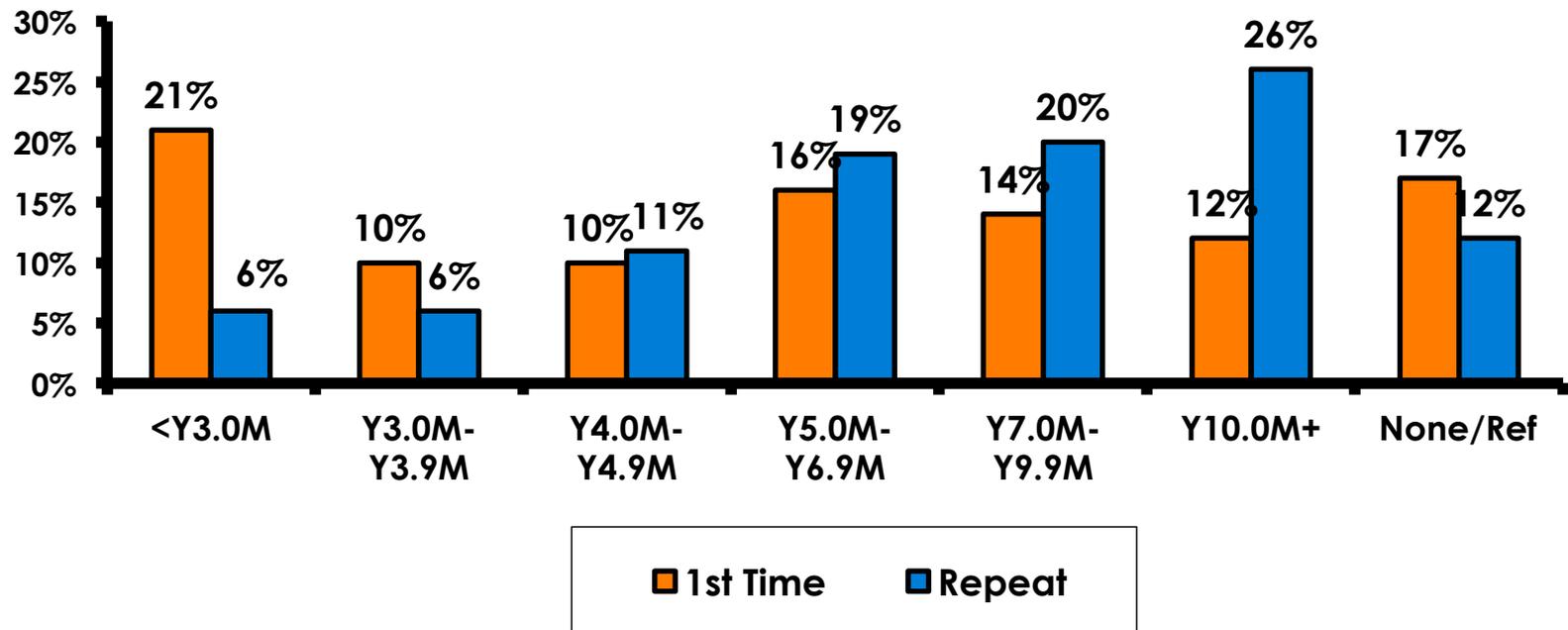
Average Age



Personal Income



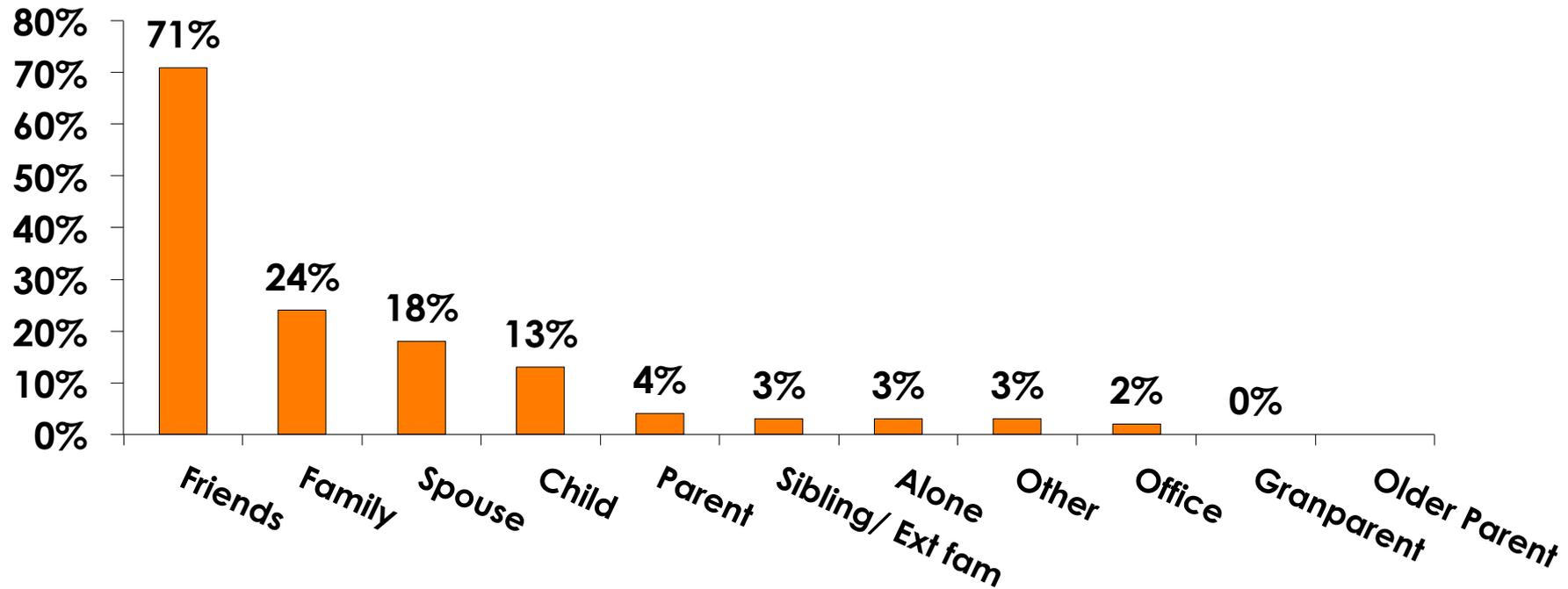
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	32	16	16	27	4		1
		Column N %	10%	10%	11%	14%	9%		9%
	Y2.0M-Y3.0M	Count	20	11	9	10	8	1	1
		Column N %	6%	7%	6%	5%	18%	2%	9%
	Y3.0M-Y4.0M	Count	27	12	15	17	7	3	
		Column N %	9%	7%	10%	9%	16%	5%	
	Y4.0M-Y5.0M	Count	32	17	15	13	6	13	
		Column N %	10%	10%	10%	7%	13%	20%	
	Y5.0M-Y7.0M	Count	52	21	31	30	9	11	2
		Column N %	17%	13%	22%	16%	20%	17%	18%
	Y7.0M-Y10.0M	Count	50	38	12	26	5	17	2
		Column N %	16%	23%	8%	14%	11%	26%	18%
	Y10.0M+	Count	50	33	17	22	5	19	4
		Column N %	16%	20%	12%	12%	11%	29%	36%
	No Income	Count	49	20	29	45	1	1	1
		Column N %	16%	12%	20%	24%	2%	2%	9%
	Total	Count	312	168	144	190	45	65	11

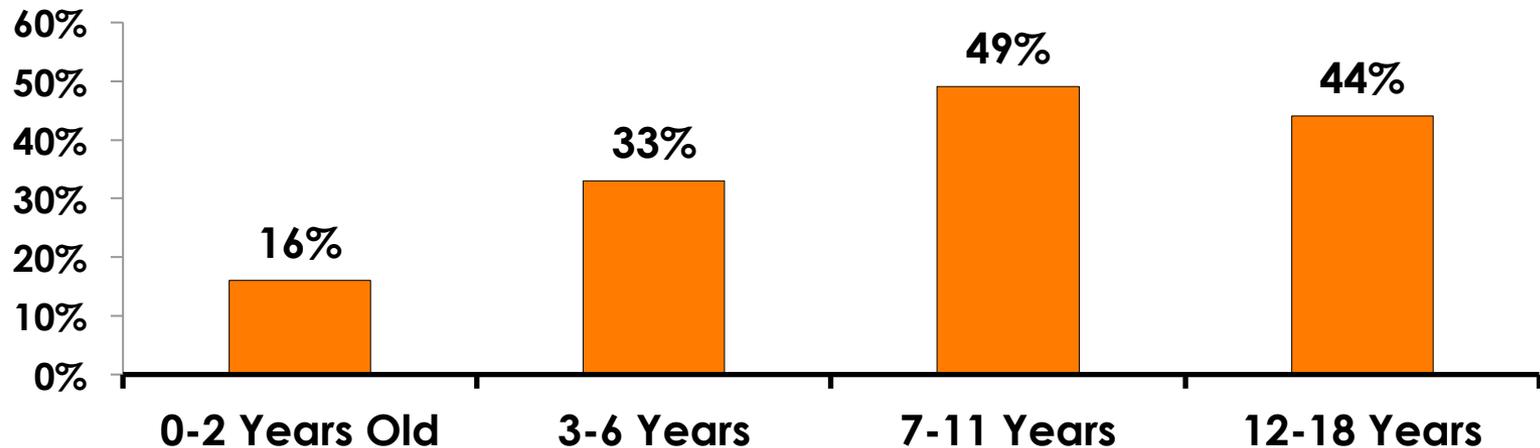
Travel Companions



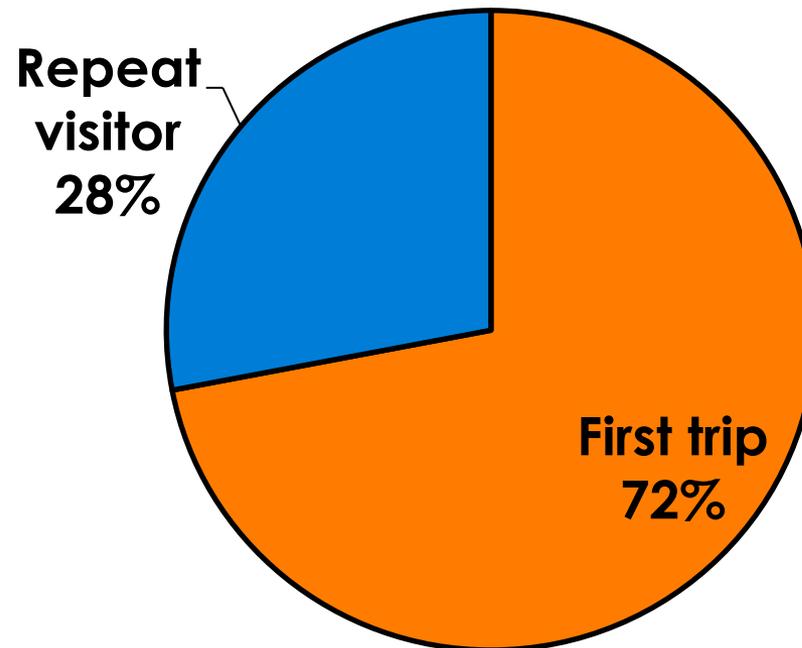
Number of Children Travel Party

N=46 total respondents traveling with children.

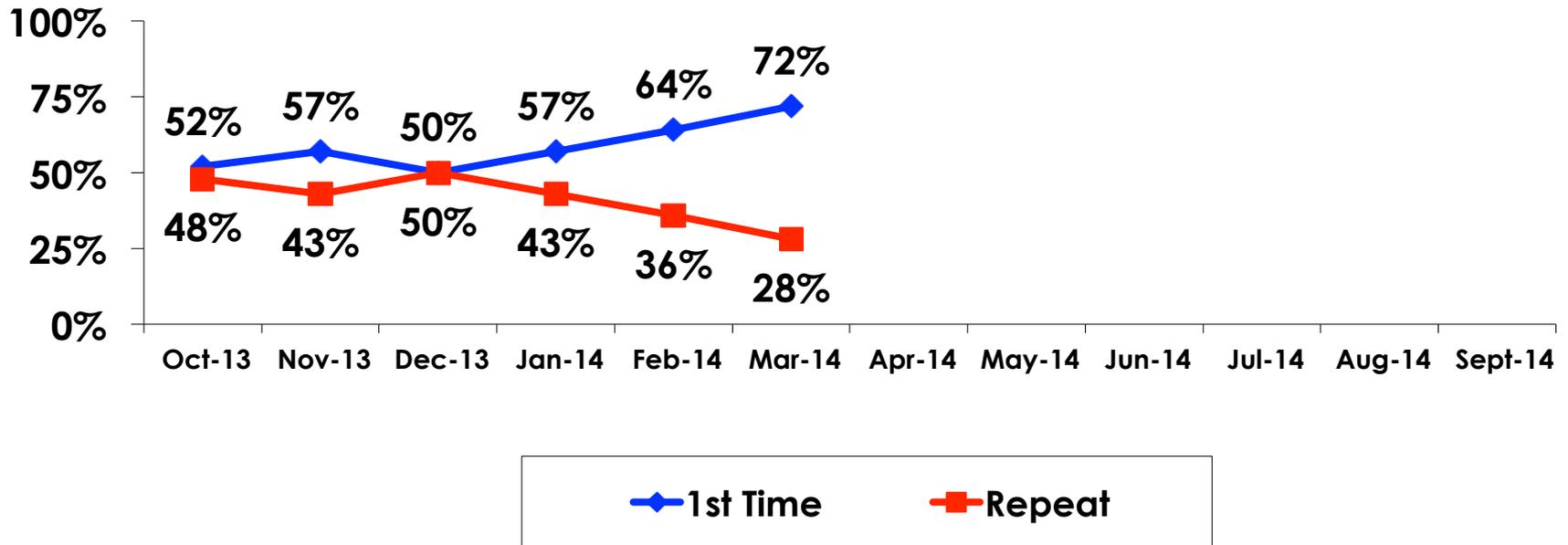
(Of those N=46 respondents, there is a total of 79 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



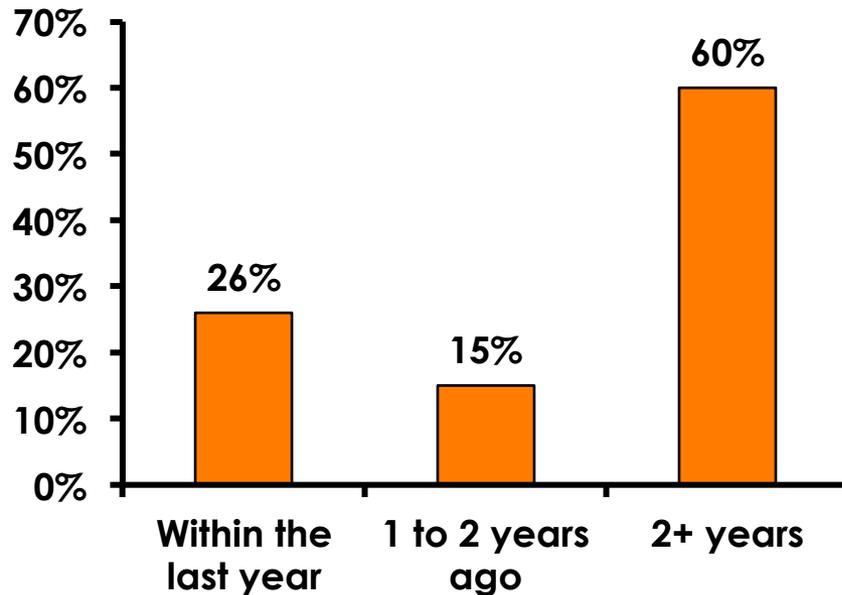
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	178	122	56	
		Column N %	51%	48%	57%	
	Female	Count	173	131	42	
		Column N %	49%	52%	43%	
Total		Count	351	253	98	
AGE	18-24	Count	227	195	32	
		Column N %	65%	77%	33%	
	25-34	Count	46	32	14	
		Column N %	13%	13%	14%	
	35-49	Count	65	24	41	
		Column N %	19%	10%	42%	
	50+	Count	11	1	10	
		Column N %	3%	0%	10%	
	Total		Count	349	252	97

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

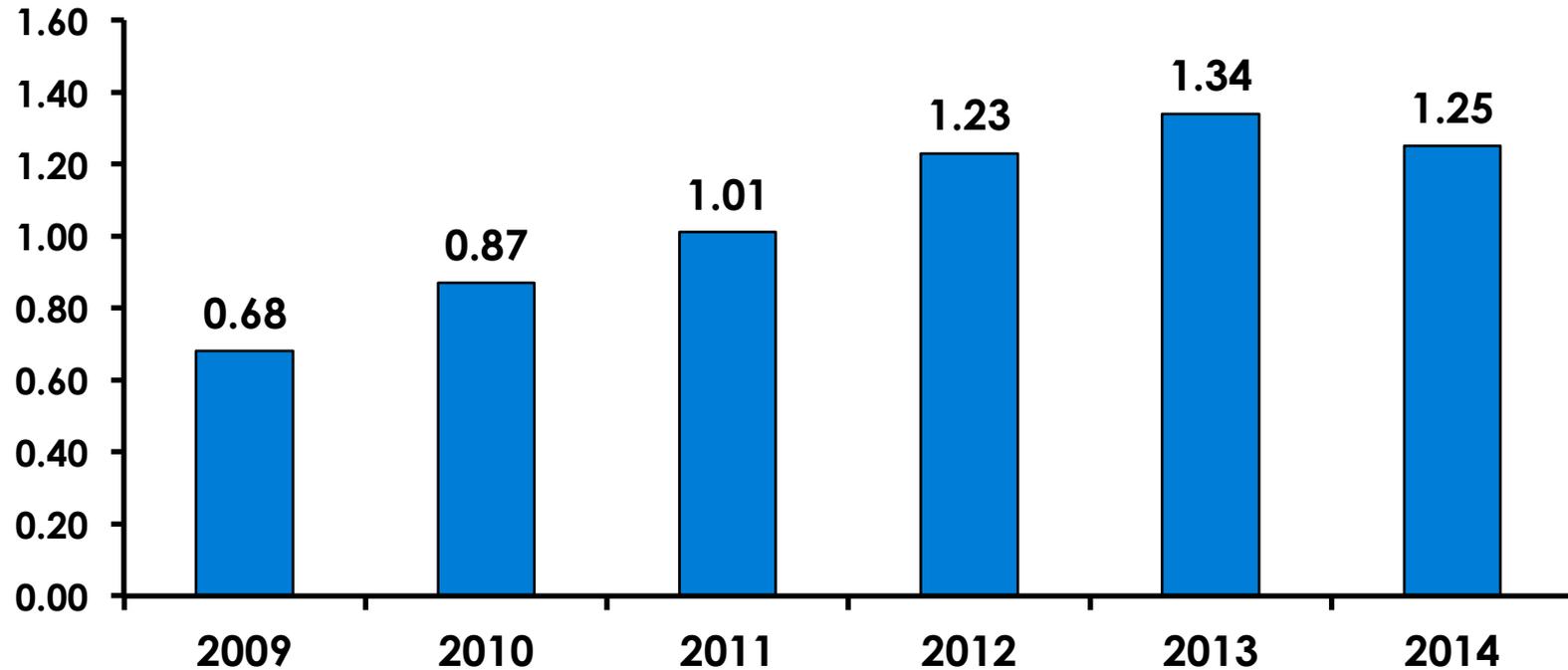
Repeat Visitors Last Trip

n = 94



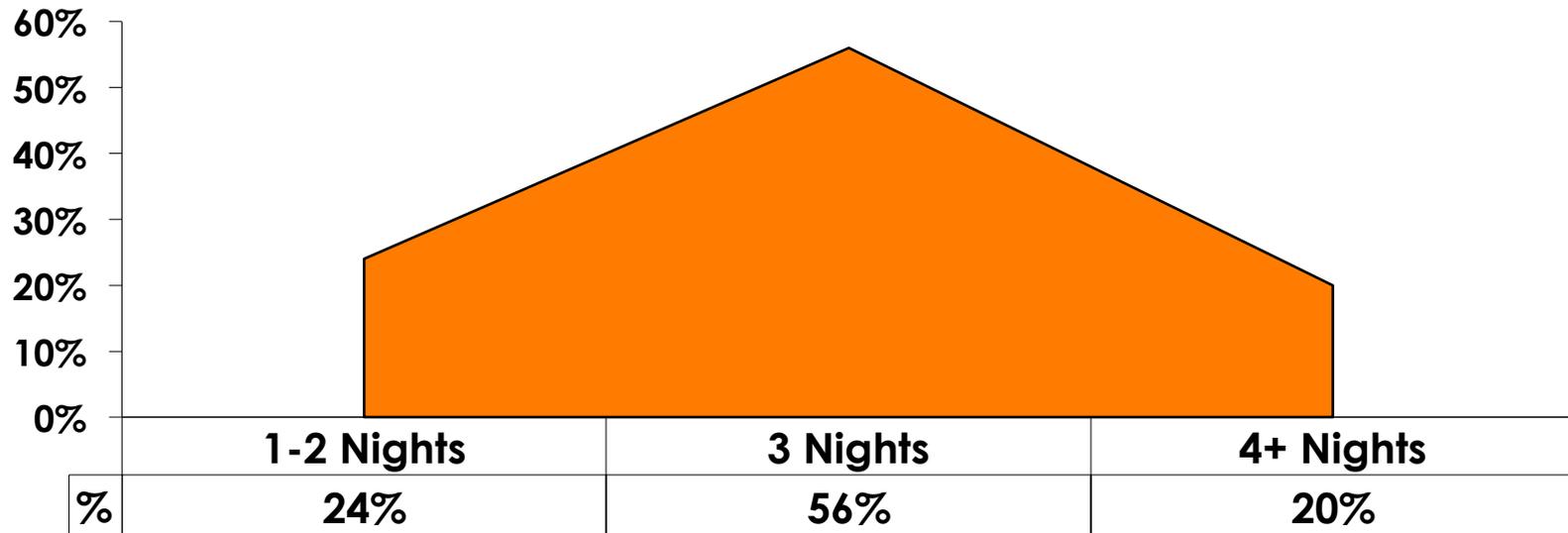
- The average repeat visitor has been to Guam 3.76 times.
- Two in five repeat visitors have been to Guam within the last 2 years.

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

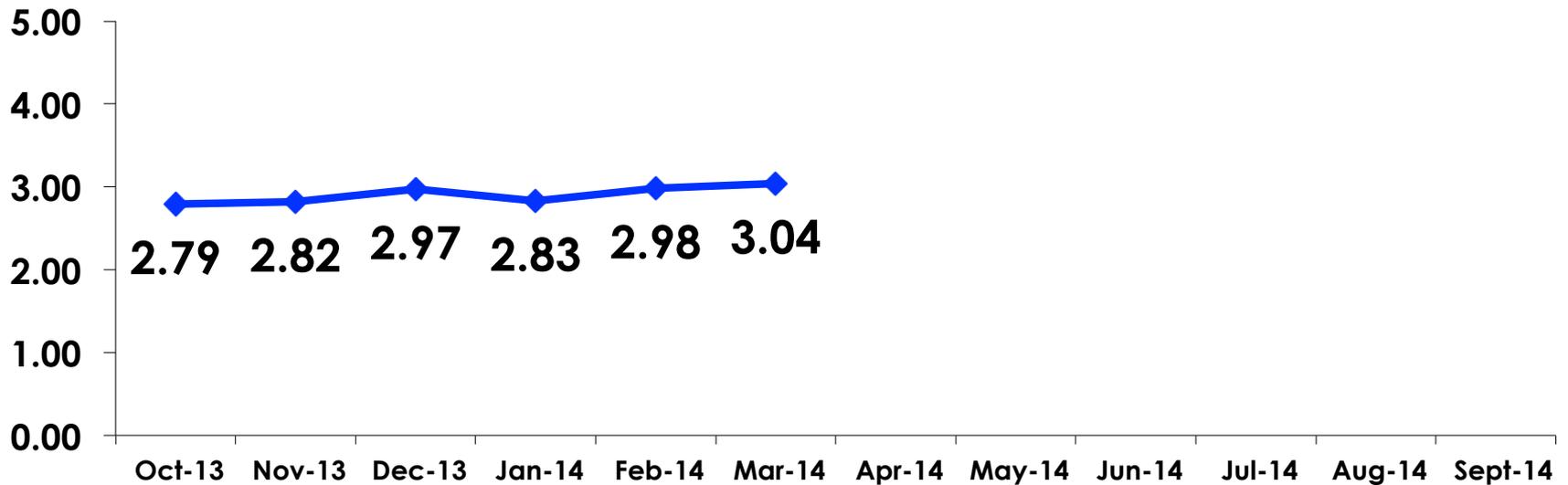


Length of Stay

Mean = 3.04 Days
Median = 3.0 Days



Average Length of Stay

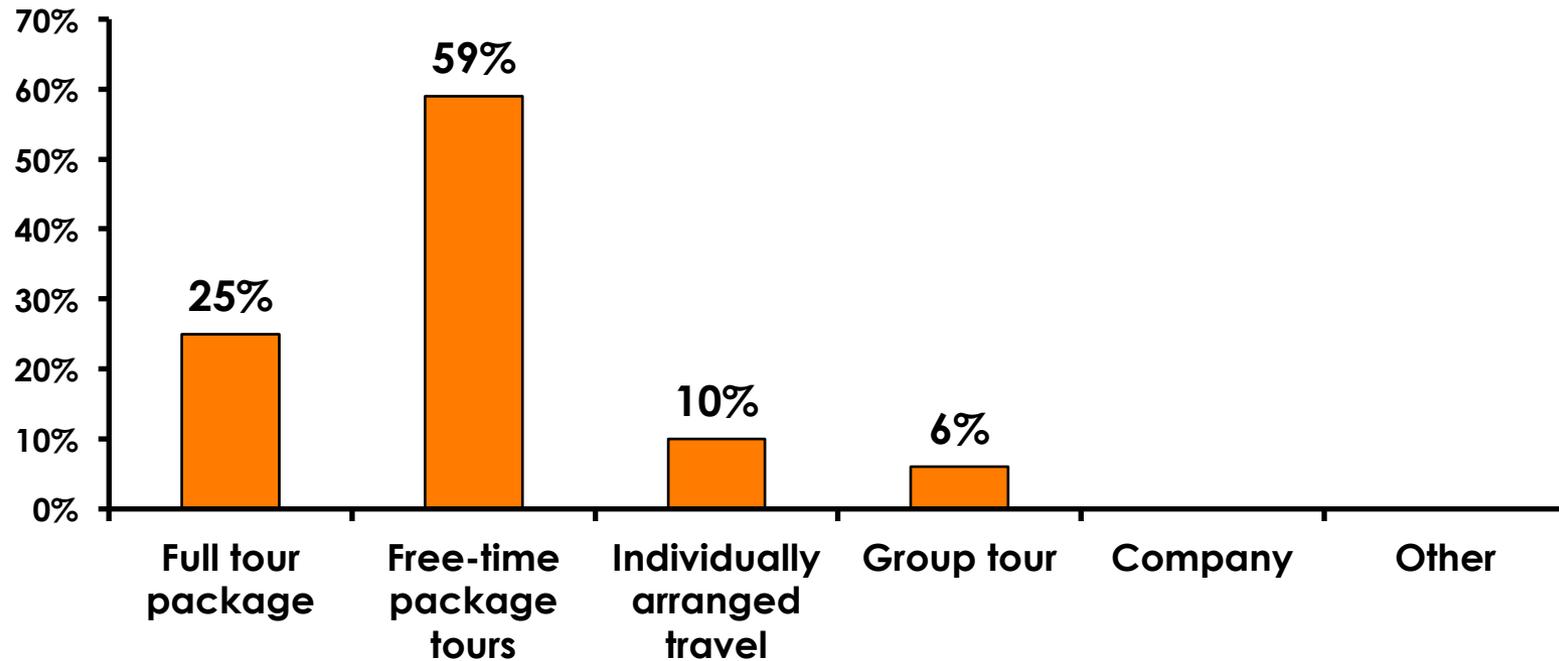


Occupation by Income

		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	Student	62%	75%	40%	56%	34%	58%	48%	48%	92%	
	Office worker non-mgr	8%	13%	25%	15%	19%	12%	2%	2%		
	Salesperson	5%		5%		19%	6%	10%	4%		
	Engineer	5%			11%	6%	4%	18%	2%		
	Self-employed	4%	3%	10%		6%		6%	14%		
	Manager	3%					4%	8%	8%	2%	
	Homemaker	3%			4%	9%	6%	2%	4%		
	Executive (30+ employees)	2%					2%	2%	10%		
	Unemployed	1%	3%					2%		6%	
	Professional/ Specialist	1%					4%	2%	4%		
	Govt- office worker non-mgr	1%		10%	7%		2%				
	Teacher	1%	3%	5%		3%			2%		
	Other	1%			4%	3%			2%		
	Freeter	1%	3%	5%							
	Govt- Manager	1%					4%				
	Retired	0%			4%						
	Skilled worker	0%									
	Total	Count	348	32	20	27	32	52	50	50	49

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

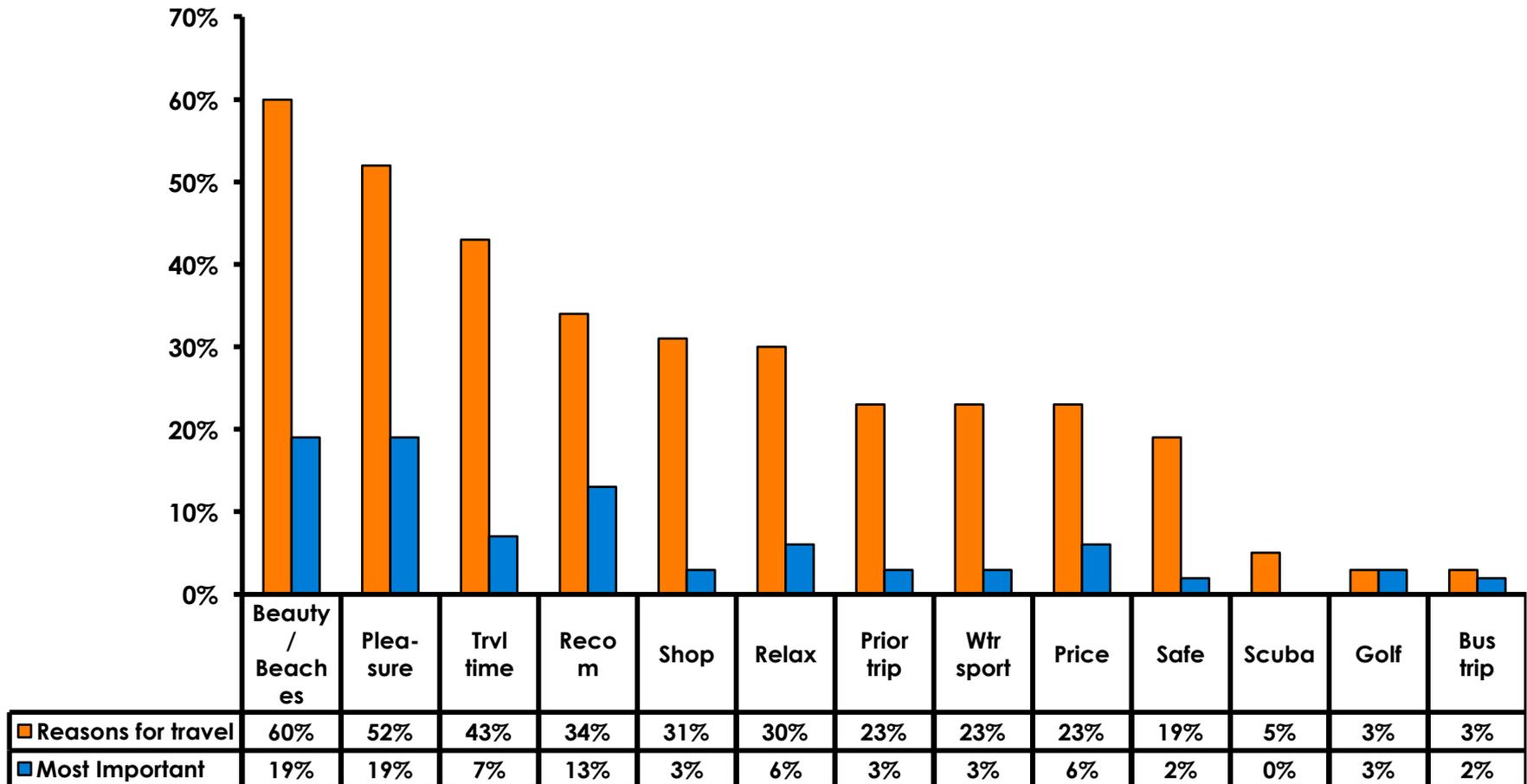


Accommodation by Income

Average length of stay: 3.04 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	13%	13%	15%	11%	22%	19%	14%	8%	18%	
Guam Reef & Olive Spa	10%	3%	5%	7%	16%	13%	12%	6%	8%	
PIC Club	7%	9%			6%	6%	4%	10%	12%	
Verona Resort & Spa	6%	6%	10%	15%	6%	6%	2%	6%	4%	
Grand Plaza Hotel	6%	13%	5%	7%	3%	6%			8%	
Outrigger Guam Resort	6%	3%		7%	9%	8%	4%	14%	2%	
Fiesta Resort Guam	5%		10%	7%	6%	2%	2%	6%	4%	
Onward Beach Resort	5%	6%		4%	6%	6%		4%	6%	
Hotel Santa Fe	5%	13%				8%	2%	8%	2%	
Hilton Guam Resort	4%	3%	5%			4%	8%	4%	2%	
Pacific Bay Hotel	4%	6%	10%	7%	9%		6%		4%	
Hotel Nikko Guam	4%		5%		6%	2%	6%	4%	6%	
Bayview Hotel	3%	9%		7%			4%	2%	4%	
Ramada Suites Guam	3%		5%	7%			6%	2%	2%	
Oceanview Hotel	3%	3%	5%	4%		4%	8%		2%	
Sheraton Laguna Guam	3%		5%	4%	3%	4%	4%	4%		
Royal Orchid Guam	3%			7%	3%	4%	2%	2%	2%	
Westin Resort Guam	2%	3%	5%				2%	6%	4%	
Holiday Resort Guam	2%		10%	4%				4%	4%	
Other	1%					2%	2%	2%	4%	
Condo	1%	6%	5%				2%	2%		
Hyatt Regency Guam	1%				3%		6%	2%		
Leo Palace Resort	1%					2%	4%	2%		
Guam Marriott Resort	1%					4%		4%		
Tumon Bay Capital Hotel	0%	3%								
Total	Count	351	32	20	27	32	52	50	50	49

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
 - Pleasure and
 - Recommendations from friends/ family
- are the primary reasons for visiting during this period.

Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty	60%	59%	57%	68%	45%	56%	64%	
	Pleasure	52%	53%	57%	48%	45%	45%	60%	
	Short travel time	43%	34%	52%	71%	55%	45%	42%	
	Recomm- friend/family/trvl agnt	34%	44%	30%	6%	9%	35%	34%	
	Shopping	31%	29%	41%	28%	45%	21%	42%	
	Relax	30%	24%	33%	46%	36%	27%	34%	
	Previous trip	23%	10%	22%	62%	73%	27%	20%	
	Water sports	23%	24%	22%	22%	18%	21%	25%	
	Price	23%	24%	22%	17%	18%	21%	24%	
	Safe	19%	16%	26%	20%	55%	19%	20%	
	Other	9%	13%	2%	3%		7%	12%	
	Scuba	5%	6%	7%	2%		6%	3%	
	Golf	3%	1%	4%	5%	36%	6%	1%	
	Company/ Business Trip	3%	3%	7%	2%		2%	4%	
	Visit friends/ Relatives	3%	4%		2%		4%	2%	
	Organized sports	3%	3%	4%		9%	5%	1%	
	Married/ Attn wedding	3%	0%	9%	6%		3%	2%	
	Honeymoon	1%	0%	4%	3%		2%	1%	
	Career Cert/ Testing	0%	0%					1%	
	Total	Count	350	226	46	65	11	177	173

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	60%	50%	55%	70%	53%	57%	64%	70%	63%	
	Pleasure	52%	47%	70%	63%	63%	39%	56%	50%	63%	
	Short travel time	43%	25%	45%	33%	50%	41%	58%	60%	41%	
	Recomm- friend/family/trvl agnt	34%	38%	30%	41%	19%	37%	32%	20%	49%	
	Shopping	31%	16%	30%	37%	38%	41%	26%	38%	31%	
	Relax	30%	25%	20%	22%	38%	31%	40%	32%	35%	
	Previous trip	23%	6%	10%	19%	25%	22%	34%	46%	18%	
	Water sports	23%	6%	20%	30%	22%	25%	18%	26%	37%	
	Price	23%	22%	35%	22%	31%	18%	24%	20%	27%	
	Safe	19%	13%	20%	19%	31%	16%	20%	24%	22%	
	Other	9%	19%		11%	6%	10%	6%	6%	12%	
	Scuba	5%		5%	7%	6%	6%	8%		10%	
	Golf	3%			4%		2%	8%	8%	2%	
	Company/ Business Trip	3%		5%		3%	6%		2%	2%	
	Visit friends/ Relatives	3%	6%			6%			4%	8%	
	Organized sports	3%	6%	5%		3%			6%	4%	
	Married/ Attn wedding	3%				6%	4%	8%	2%		
	Honeymoon	1%		5%	4%	3%	2%			2%	
	Career Cert/ Testing	0%								2%	
	Total	Count	350	32	20	27	32	51	50	50	49

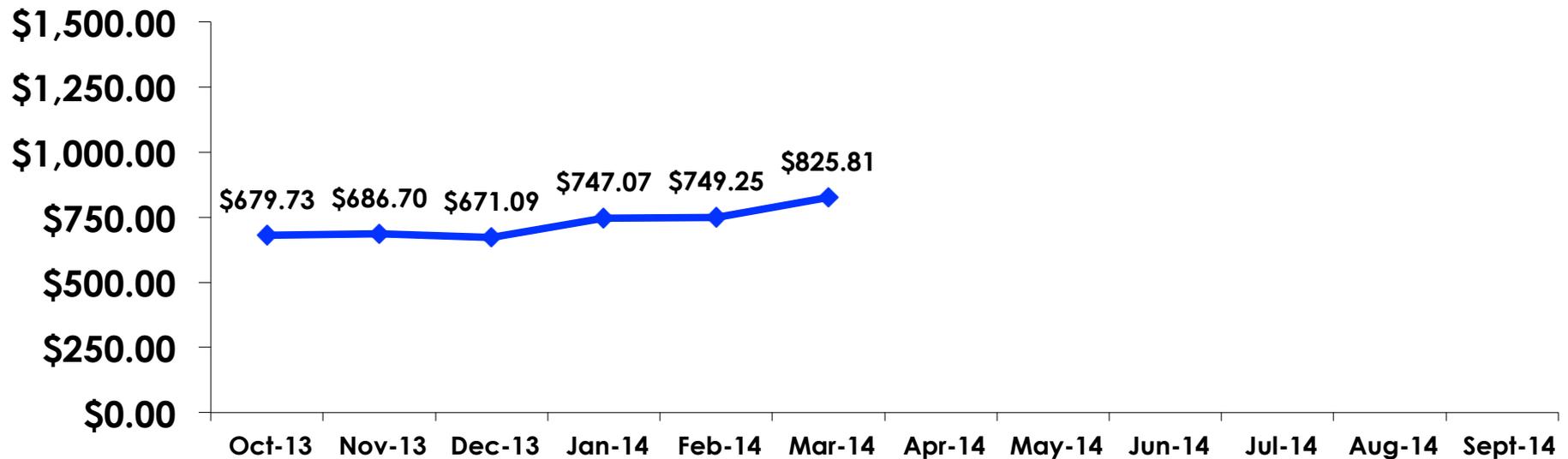
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥102.20/US\$1

- \$1,592.13 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$34,247 = maximum (highest amount recorded for the entire sample)
- \$825.81 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



YTD=\$726.65

Breakdown of Prepaid Expenditures

¥102.20=\$1

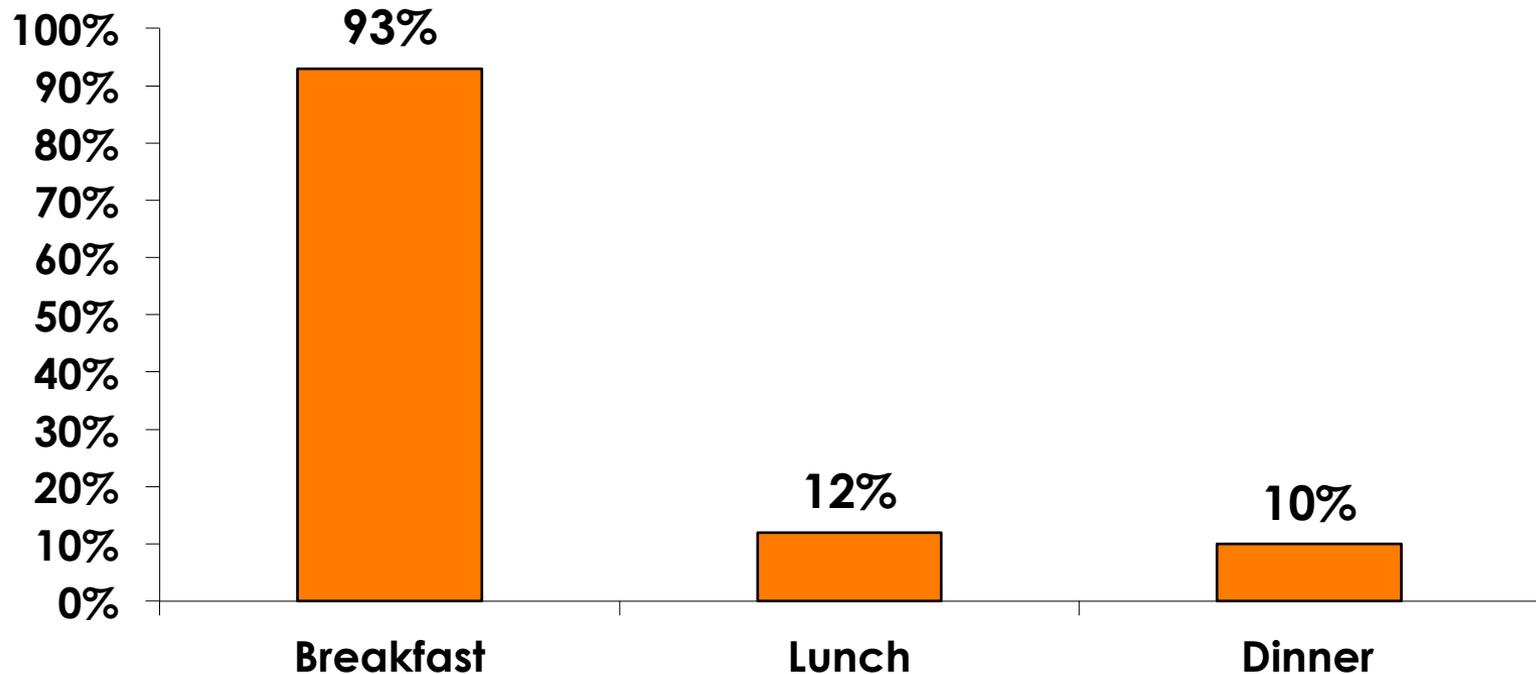
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,286.42
Air & Accommodation w/ daily meal package	\$2,215.26
Air only	\$1,092.64
Accommodation only	\$781.50
Accommodation w/ daily meal only	\$1,247.55
Food & Beverages in Hotel	\$89.04
Ground transportation – Japan	\$130.21
Ground transportation – Guam	\$61.22
Optional tours/ activities	\$296.52
Other expenses	\$1,368.40
Total Prepaid	\$1,592.13

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

n=42

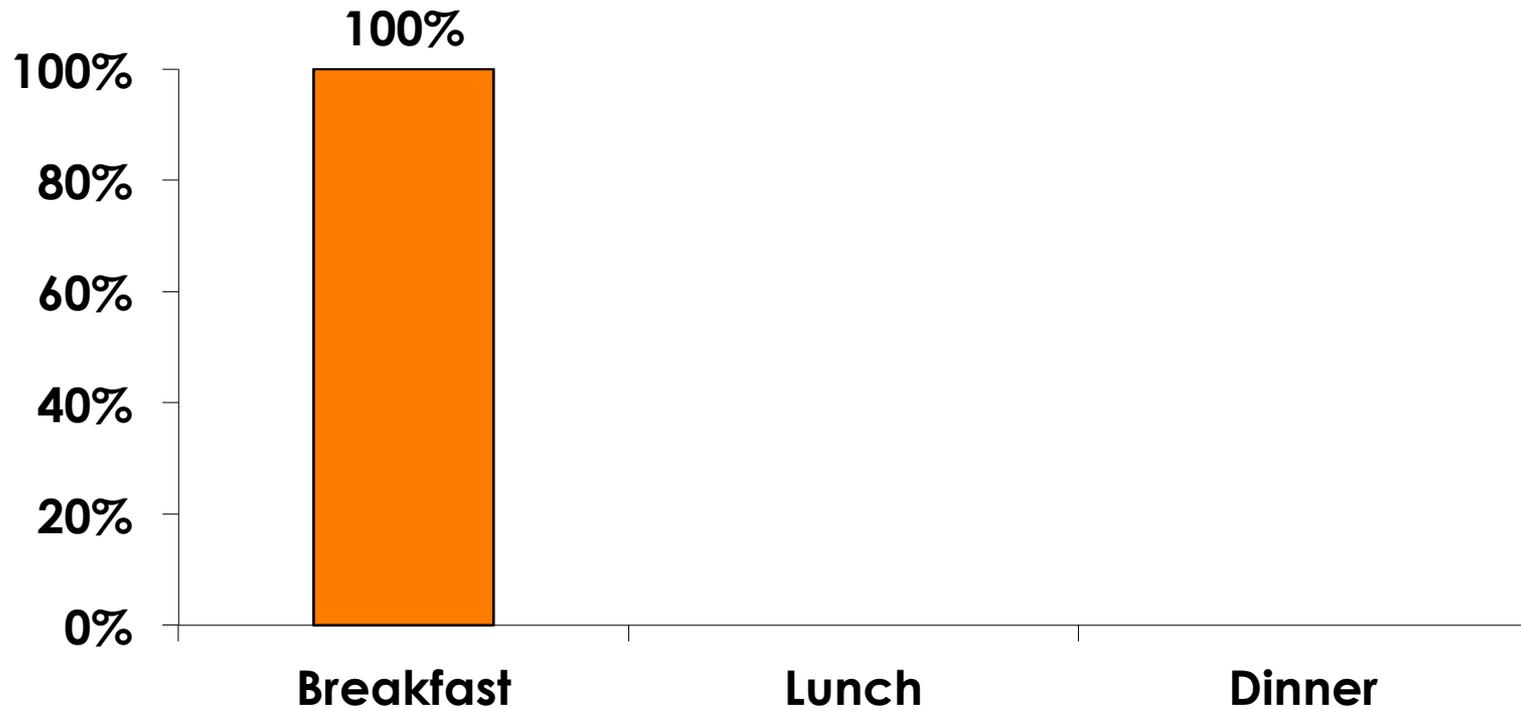


Mean=\$2,215.26 per travel party

Prepaid Meal Breakdown

Accommodations with Daily Meal Package

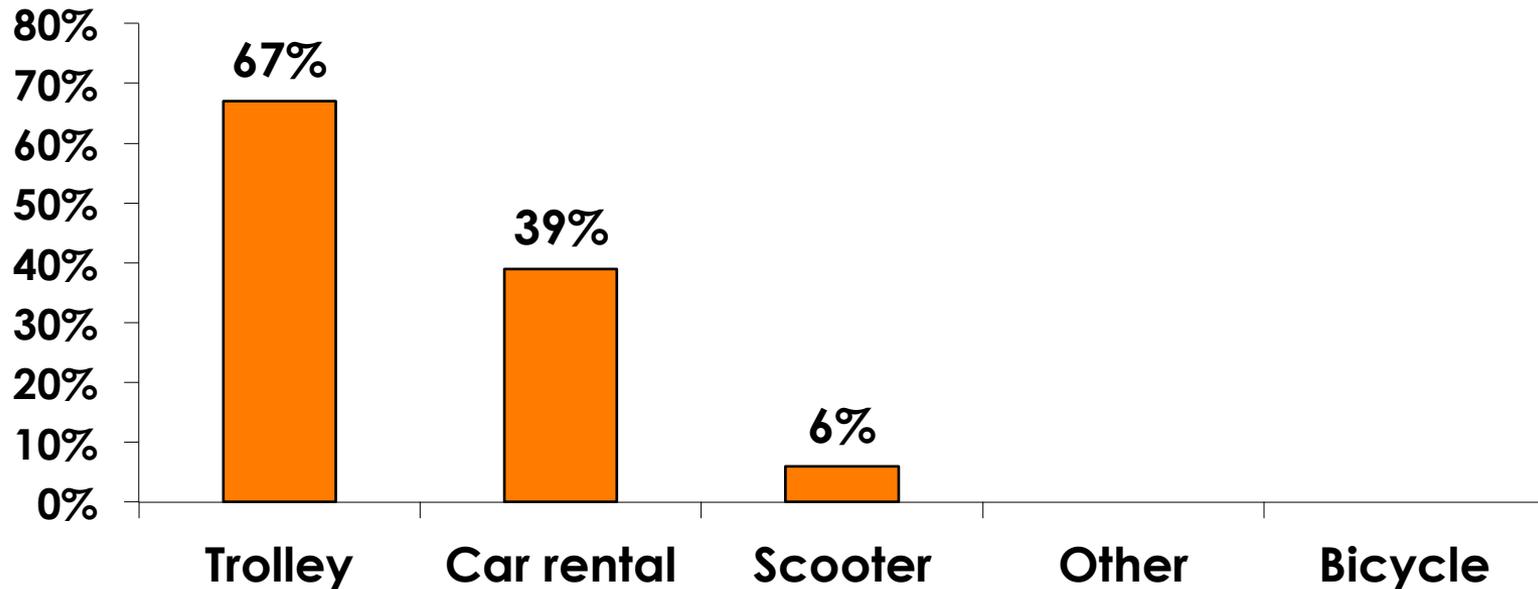
N=2



Mean=\$1,247.55 per travel party

Prepaid Ground Transportation

n=18

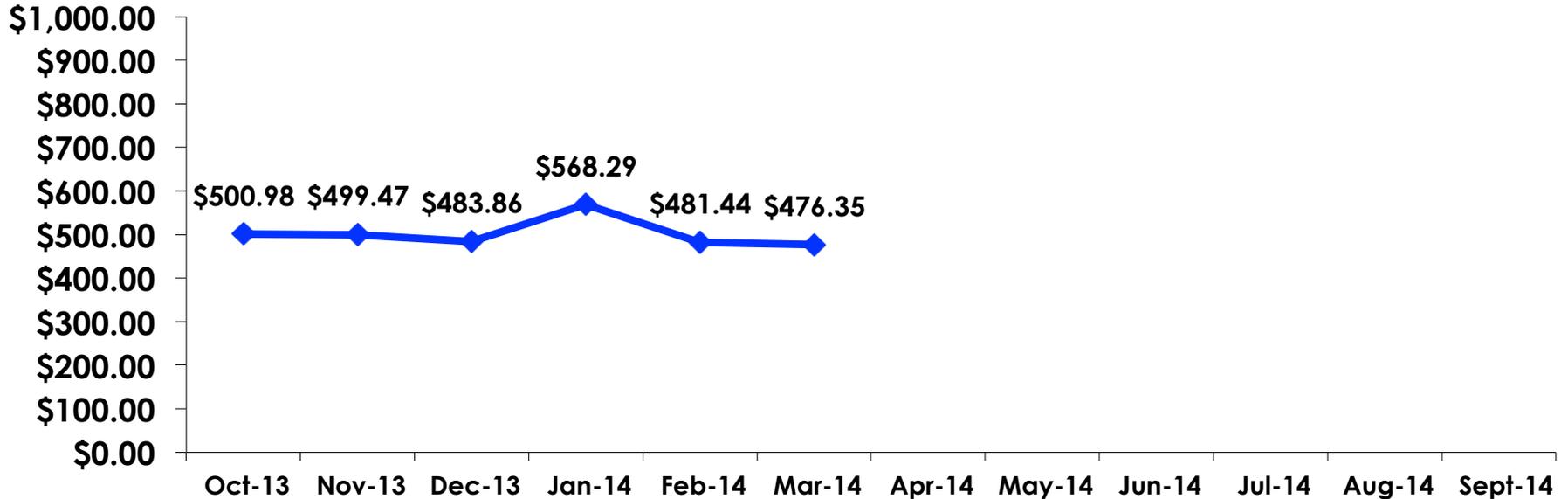


Mean=\$61.22 per travel party

On-Island Expenditures

- \$773.79 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$40,000 = Maximum (highest amount recorded for the entire sample)
- \$476.35 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person

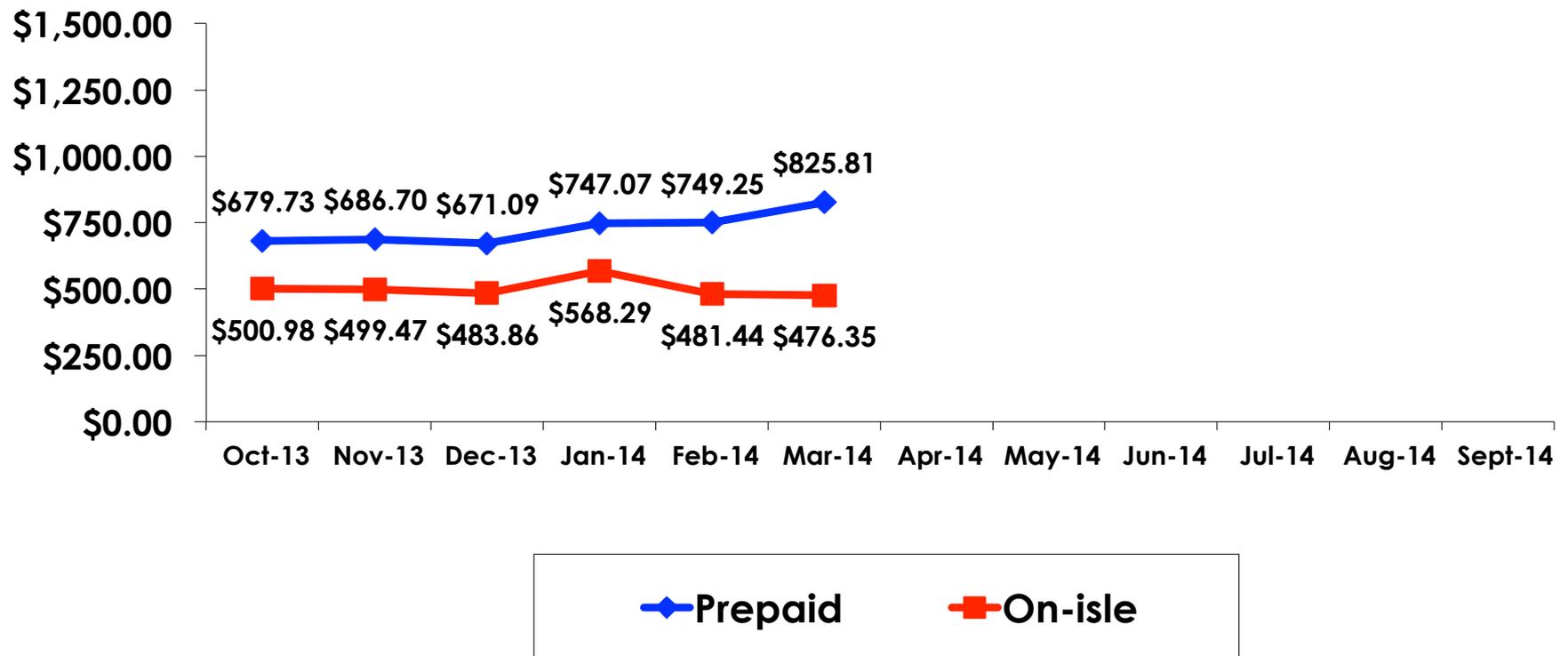


YTD = \$501.71

Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$726.65

On-Island YTD = \$501.71



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	\$476.35	\$499.16	\$452.89	\$371.63	\$453.02	\$807.53	\$718.89	\$447.07	\$434.78	\$570.82	\$269.13
	Median	\$333	\$332	\$338	\$340	\$300	\$300	\$675	\$338	\$398	\$300	\$225
	Minimum	\$0	\$0	\$0	\$0	\$100	\$0	\$333	\$0	\$150	\$0	\$104
	Maximum	\$10,000	\$10,000	\$5,500	\$1,200	\$2,000	\$10,000	\$1,400	\$5,500	\$1,500	\$2,250	\$450

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$44.57	\$60.10	\$28.59	\$26.76	\$35.30	\$91.69	\$174.55
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$100
F&B FF/STORE	Mean	\$45.70	\$62.25	\$28.67	\$27.56	\$33.11	\$120.80	\$37.27
	Median	\$10	\$11	\$1	\$8	\$20	\$20	\$0
F&B RESTRNT	Mean	\$140.81	\$235.40	\$43.50	\$47.54	\$72.83	\$518.69	\$138.18
	Median	\$25	\$50	\$0	\$20	\$50	\$100	\$70
OPT TOUR	Mean	\$76.43	\$106.10	\$45.91	\$45.39	\$115.35	\$156.14	\$97.27
	Median	\$0	\$0	\$0	\$0	\$25	\$0	\$0
GIFT- SELF	Mean	\$158.26	\$177.09	\$138.88	\$71.69	\$109.46	\$508.31	\$109.09
	Median	\$30	\$10	\$50	\$10	\$73	\$100	\$100
GIFT- OTHER	Mean	\$111.45	\$120.73	\$101.90	\$80.43	\$103.78	\$211.82	\$204.55
	Median	\$60	\$50	\$70	\$50	\$75	\$100	\$150
TRANS	Mean	\$16.53	\$18.20	\$14.81	\$11.97	\$20.67	\$24.22	\$50.91
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$175.93	\$102.44	\$251.54	\$145.10	\$58.61	\$339.42	\$353.64
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$773.79	\$890.69	\$653.51	\$456.26	\$549.11	\$1,993.38	\$1,168.18
	Median	\$400	\$500	\$400	\$353	\$500	\$900	\$1,000

On-Island Expenditures

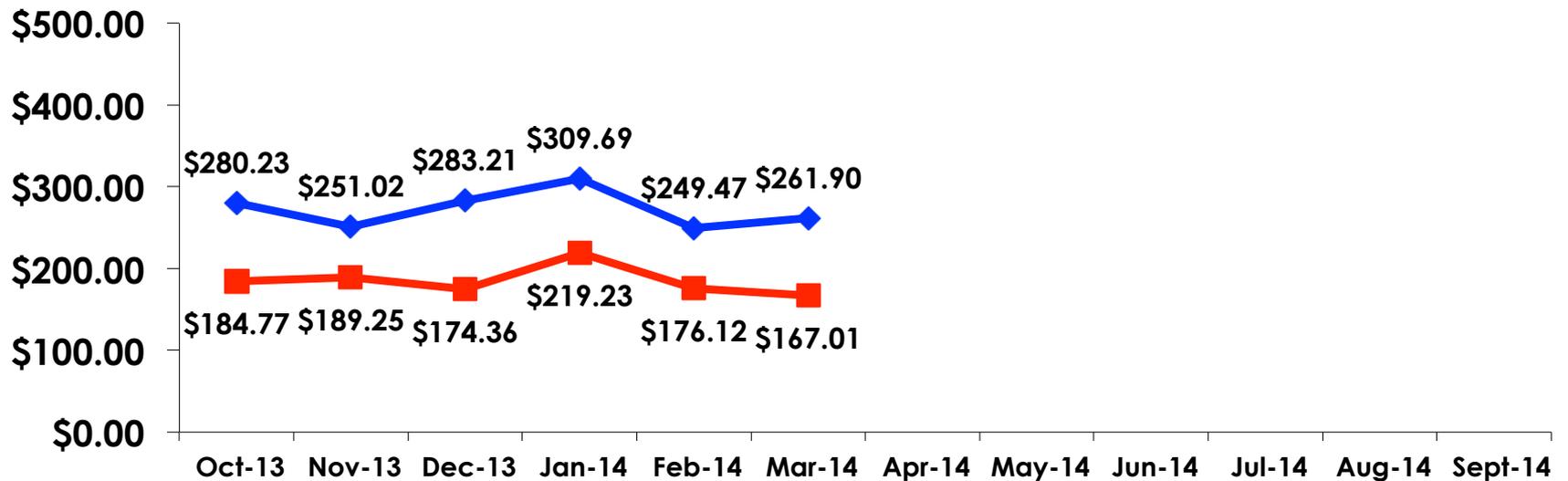
First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$44.57	\$26.35	\$91.60
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$45.70	\$28.53	\$90.03
	Median	\$10	\$10	\$10
F&B RESTRNT	Mean	\$140.81	\$58.77	\$352.62
	Median	\$25	\$20	\$50
OPT TOUR	Mean	\$76.43	\$70.53	\$91.67
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$158.26	\$100.68	\$306.89
	Median	\$30	\$20	\$50
GIFT- OTHER	Mean	\$111.45	\$90.43	\$165.70
	Median	\$60	\$50	\$100
TRANS	Mean	\$16.53	\$9.24	\$35.35
	Median	\$0	\$0	\$0
OTHER	Mean	\$175.93	\$152.66	\$235.99
	Median	\$0	\$0	\$0
TOTAL	Mean	\$773.79	\$538.63	\$1,380.88
	Median	\$400	\$400	\$600

On-Island Expenditures Per Day

Travel Party YTD = \$272.54

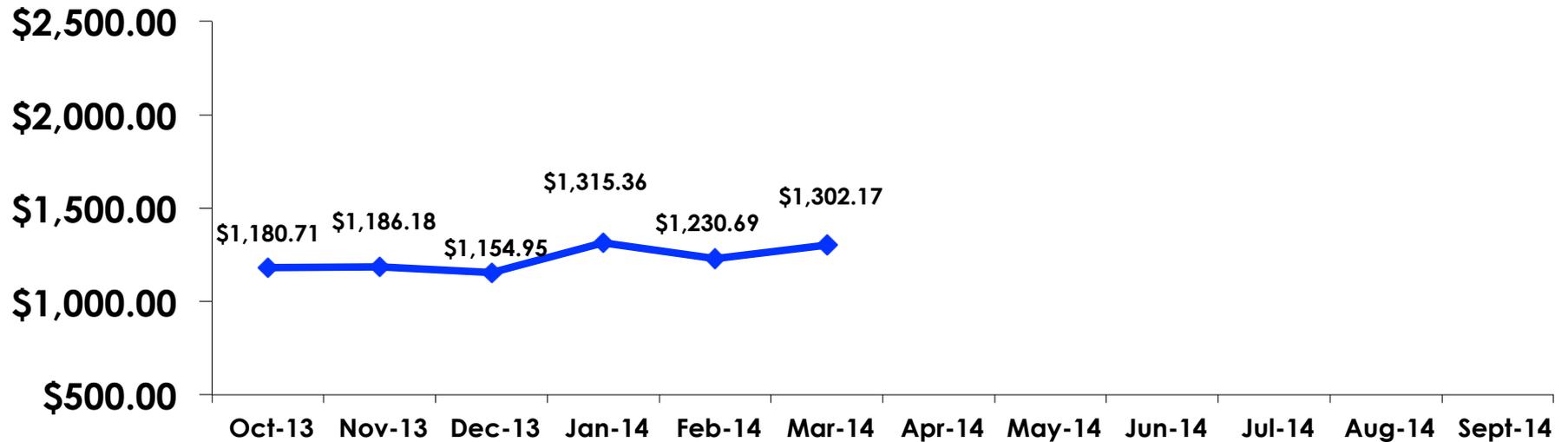
Per Person YTD = \$185.08



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,302.17 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$11,380 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person



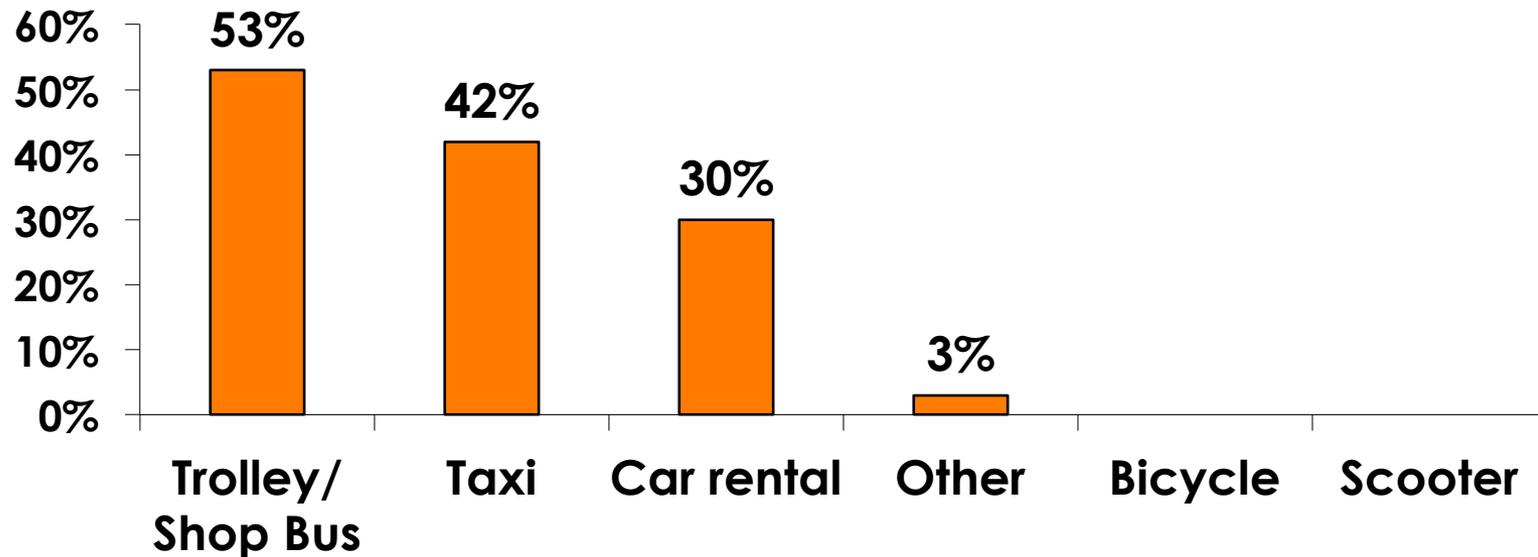
YTD=\$1,228.36

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$44.57
Food & beverage in fast food restaurant/ convenience store	\$45.70
Food & beverage at restaurants or drinking establishments outside a hotel	\$140.81
Optional tours and activities	\$76.43
Gifts/ souvenirs for yourself/companions	\$158.26
Gifts/ souvenirs for friends/family at home	\$111.45
Local transportation	\$16.53
Other expenses not covered	\$175.93
Average Total	\$773.79

Local Transportation

n=66



Mean=\$16.53 per travel party

Guam Airport Expenditures

- \$25.55 = Mean
- \$3 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

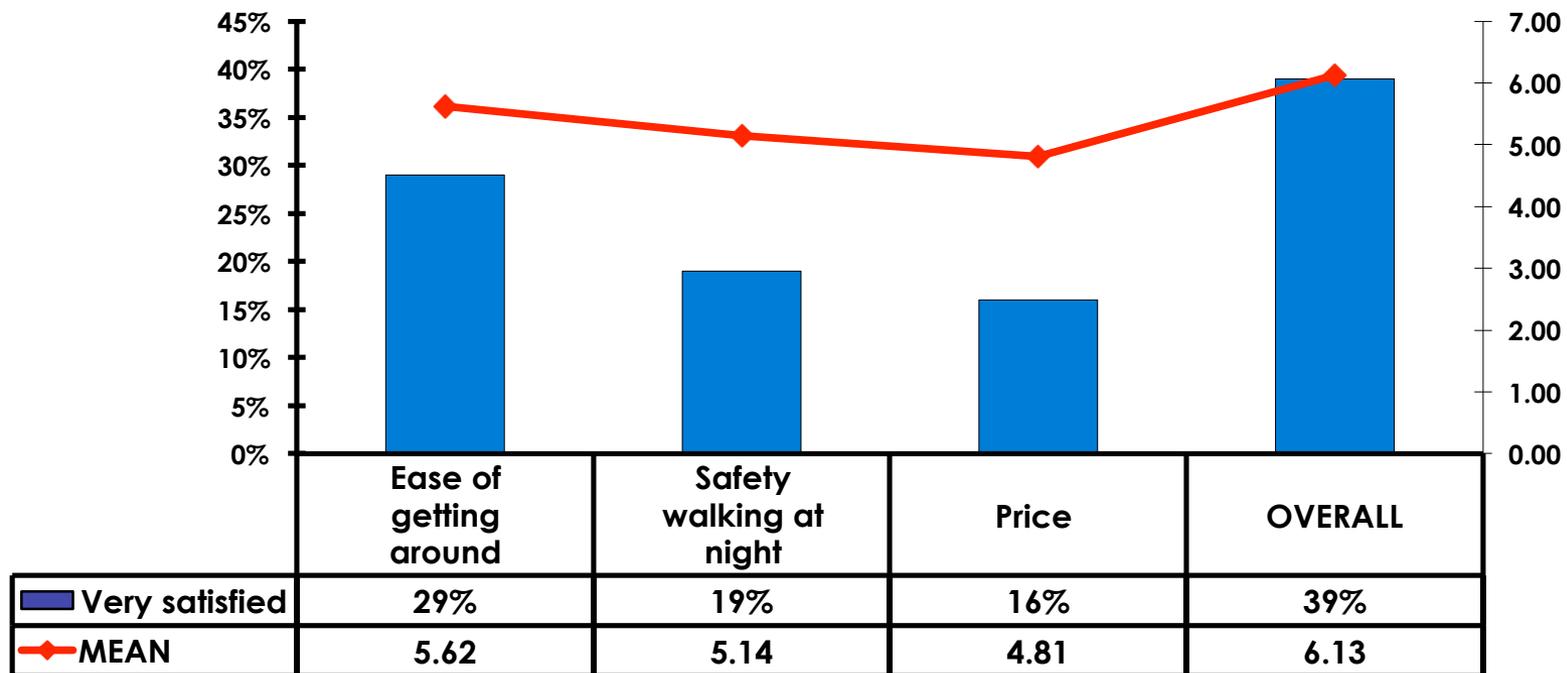
	MEAN \$
Food & Beverages	\$8.11
Gifts/Souvenirs Self	\$6.84
Gifts/Souvenirs Others	\$10.57
Total	\$25.55

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

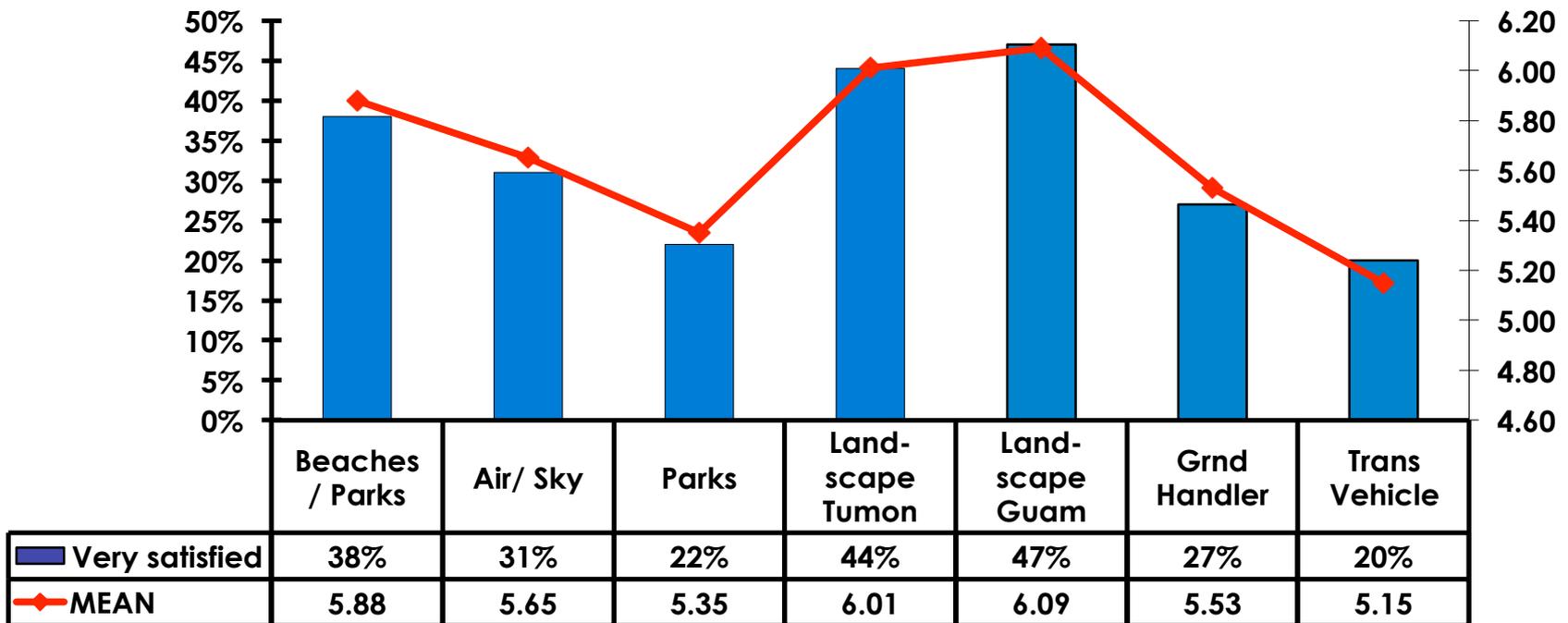
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

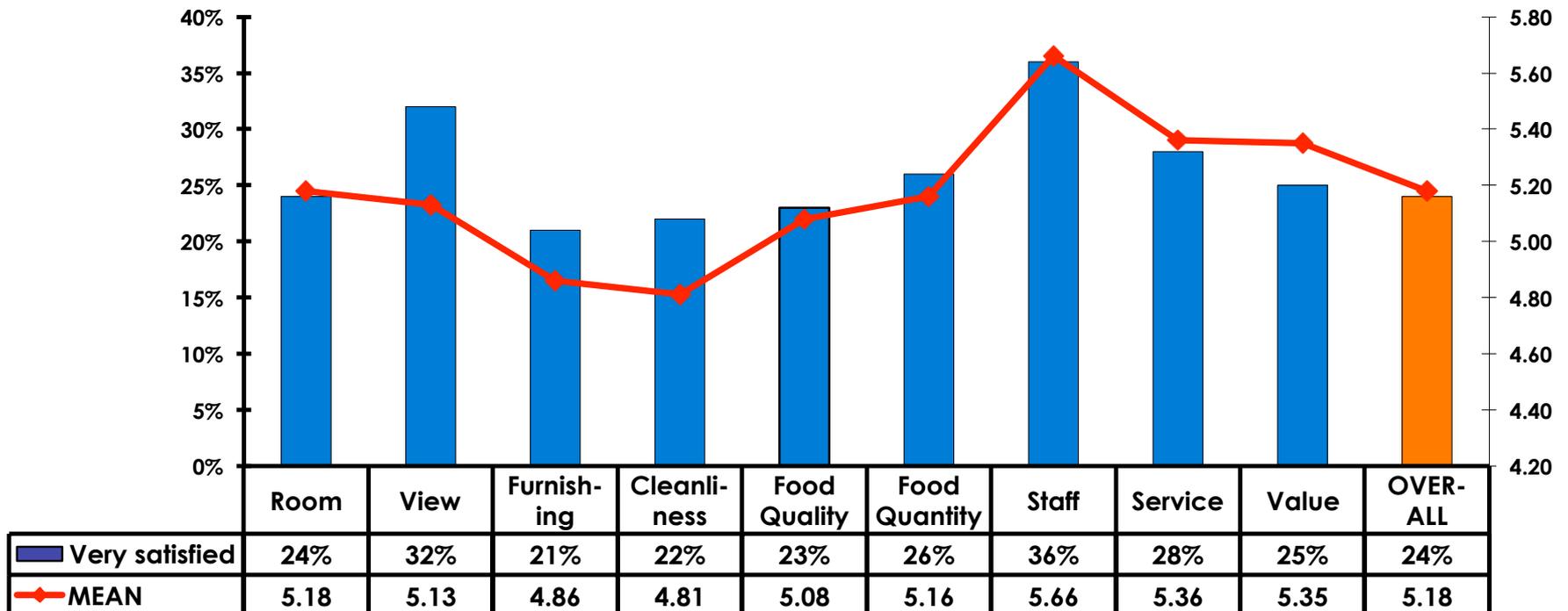
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

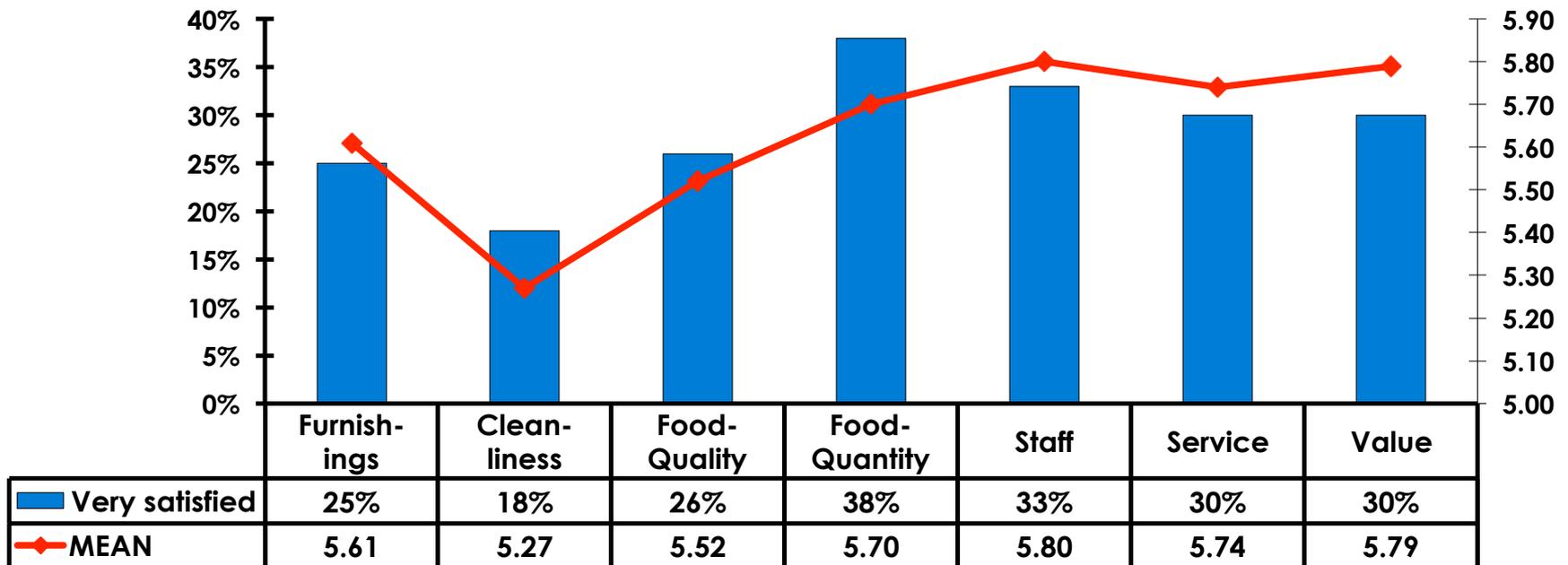
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

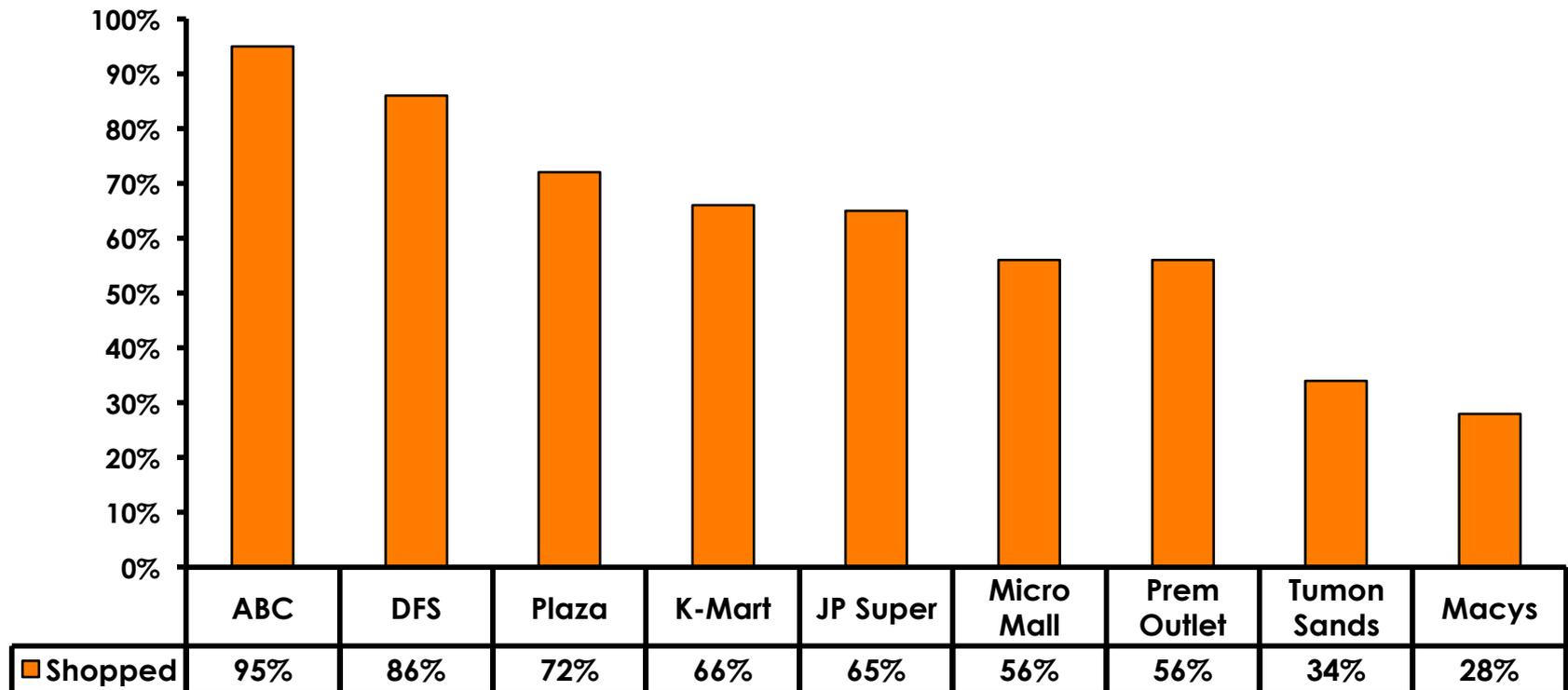
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

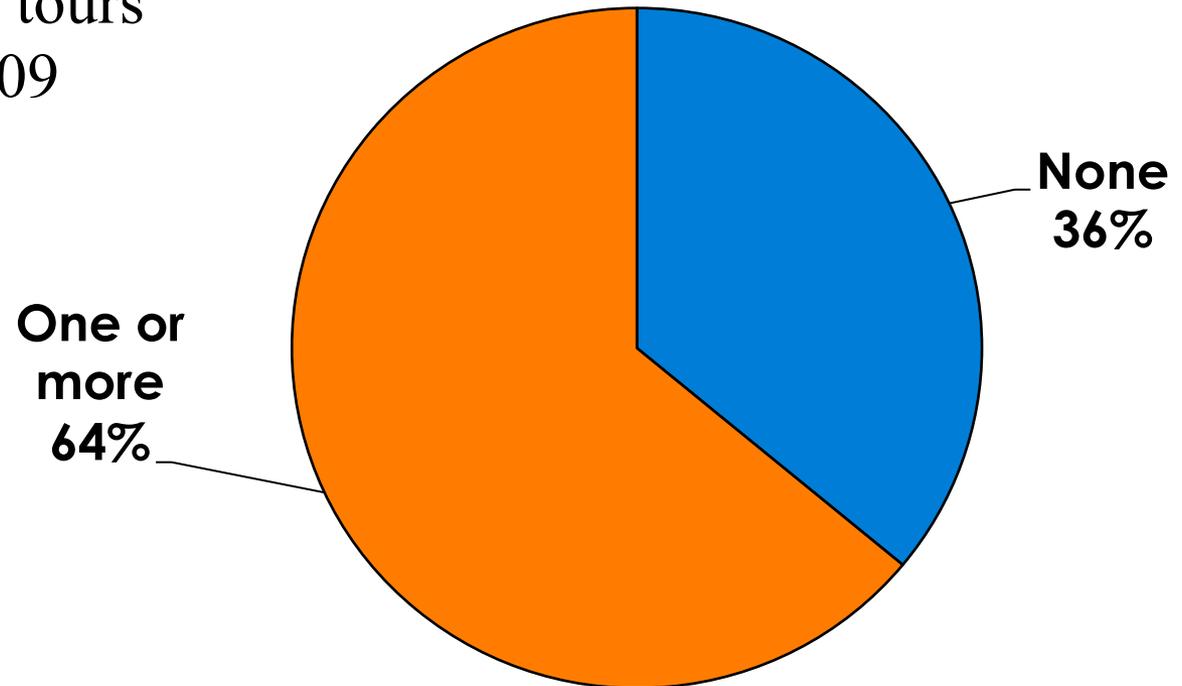
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 61%	Score of 6 to 7 = 62%
Score of 4 to 5 = 35%	Score of 4 to 5 = 33%
Score 1 to 3 = 5%	Score 1 to 3 = 6%
MEAN = 5.61	MEAN = 5.57

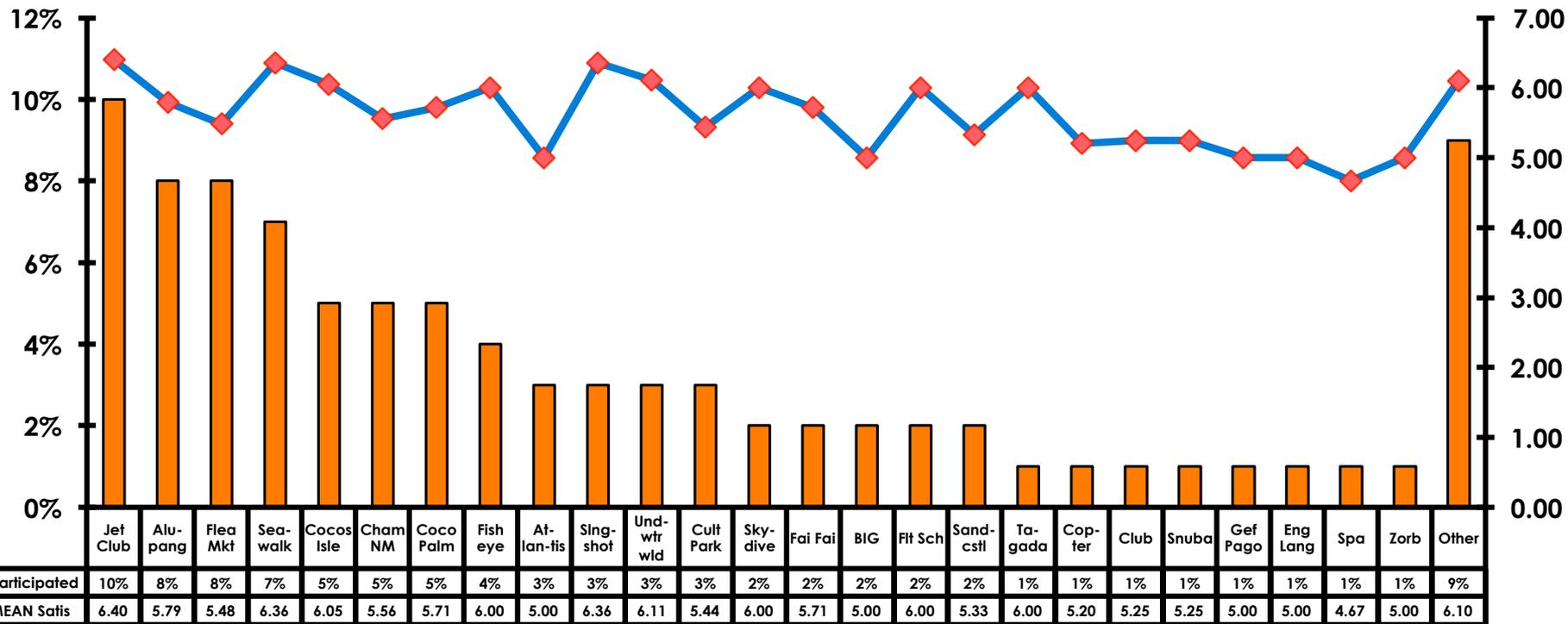
Optional Tour Participation

- Average number of tours participated in is 1.09



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 = 64%	Score of 6 to 7 = 60%
Score of 4 to 5 = 36%	Score of 4 to 5 = 39%
Score 1 to 3 = 1%	Score 1 to 3 = 1%
MEAN = 5.68	MEAN = 5.60

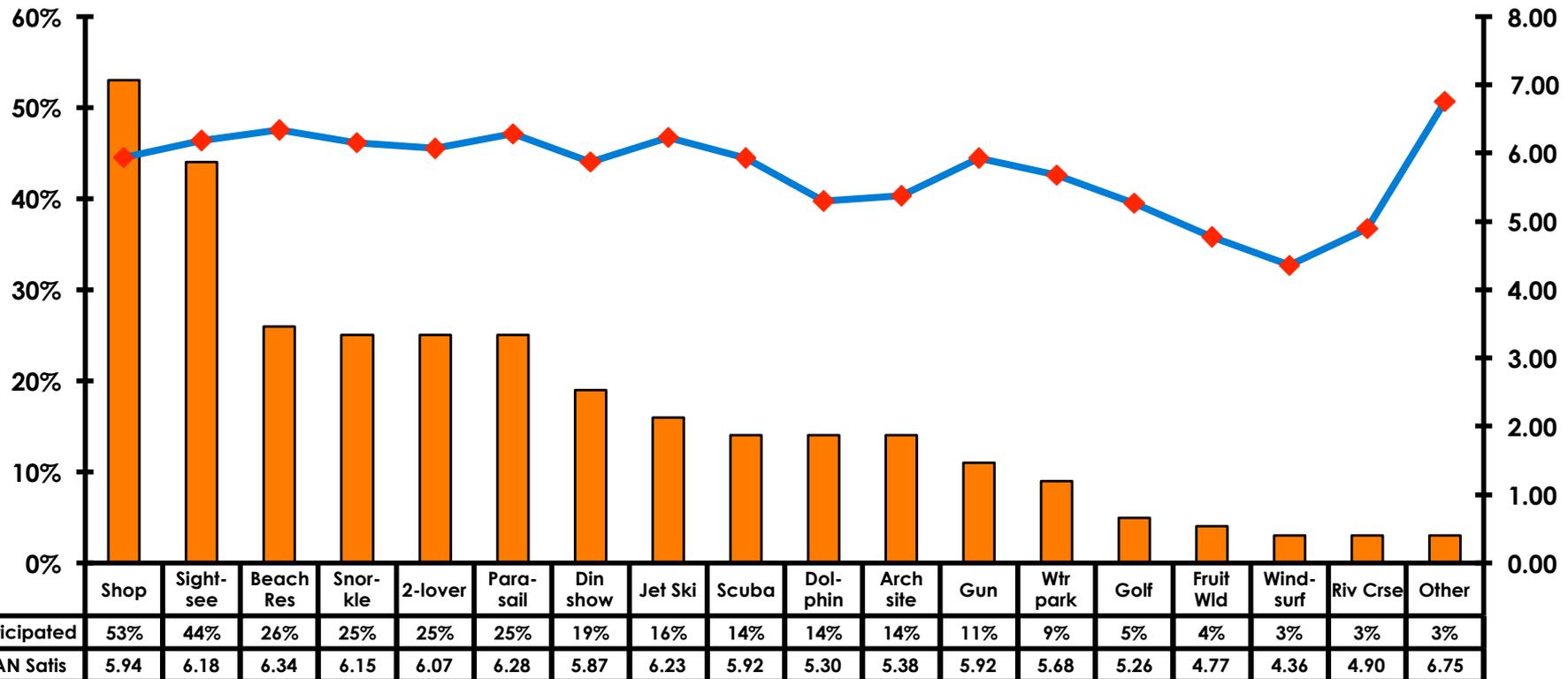
Night Tours Satisfaction

7pt Rating Scale

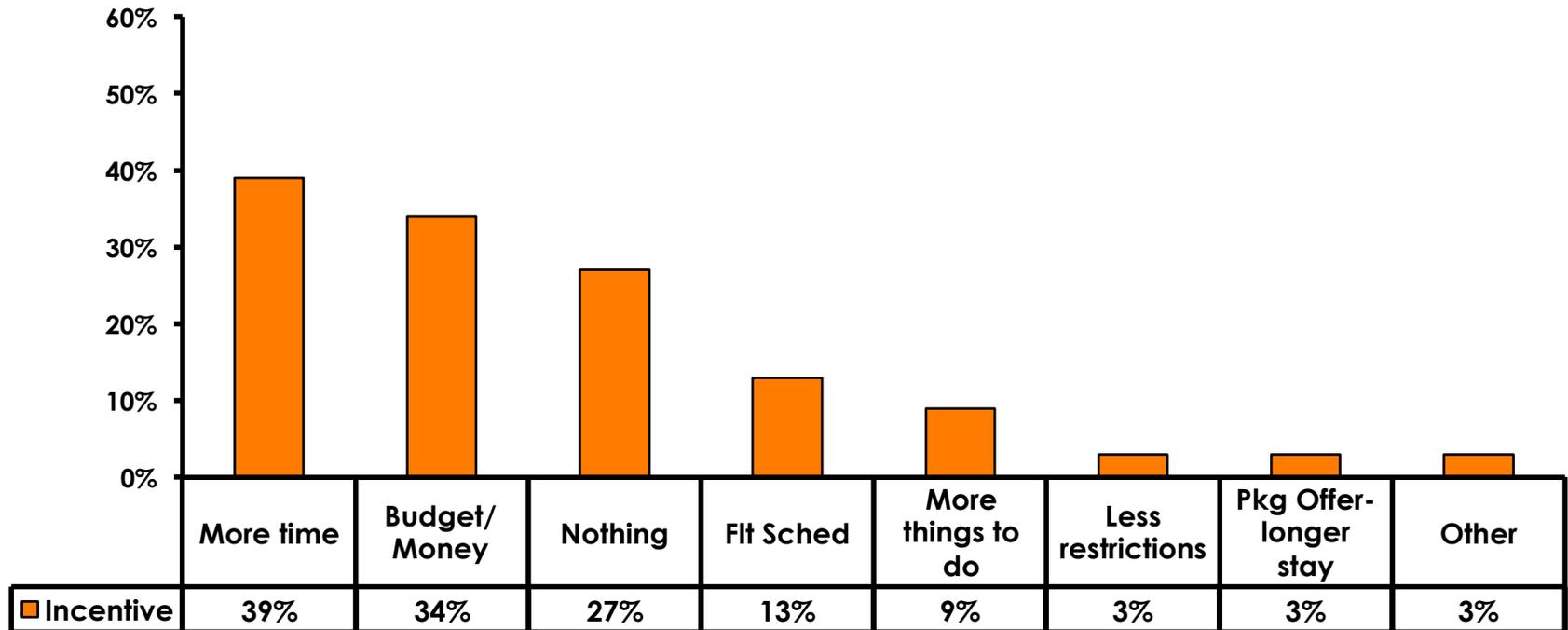
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 31%	Score of 6 to 7 = 32%
Score of 4 to 5 = 66%	Score of 4 to 5 = 65%
Score 1 to 3 = 2%	Score 1 to 3 = 3%
MEAN = 4.87	MEAN = 4.89

Satisfaction with Other Activities



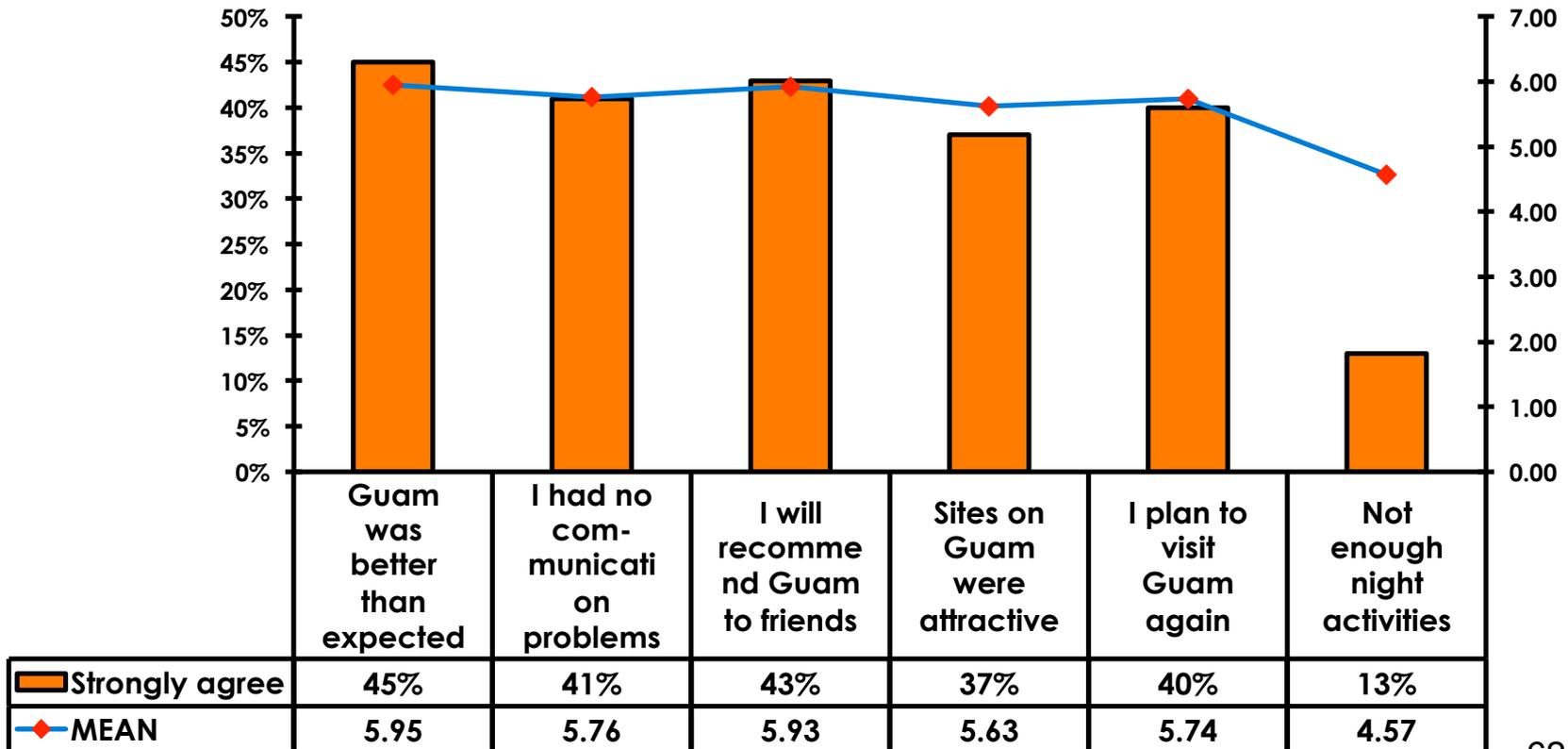
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

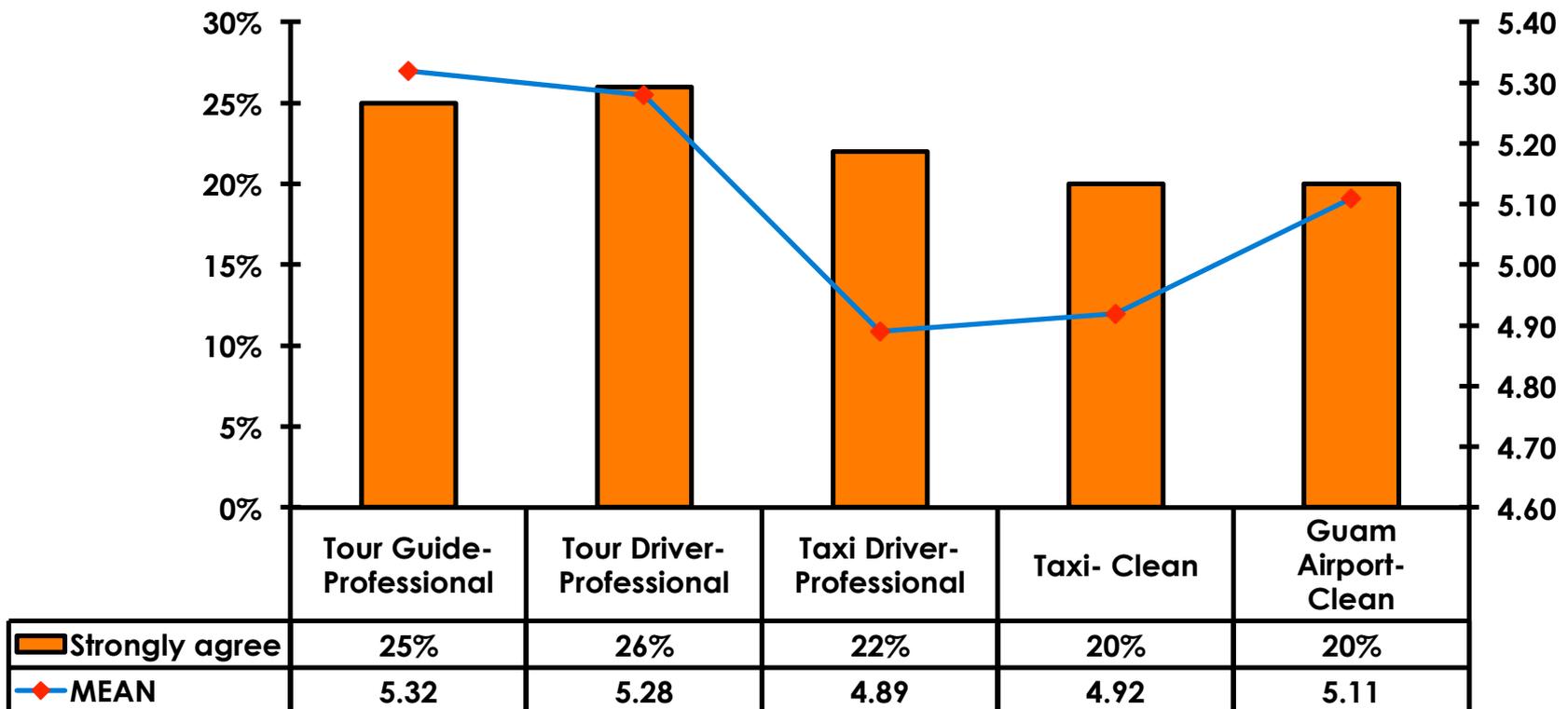
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

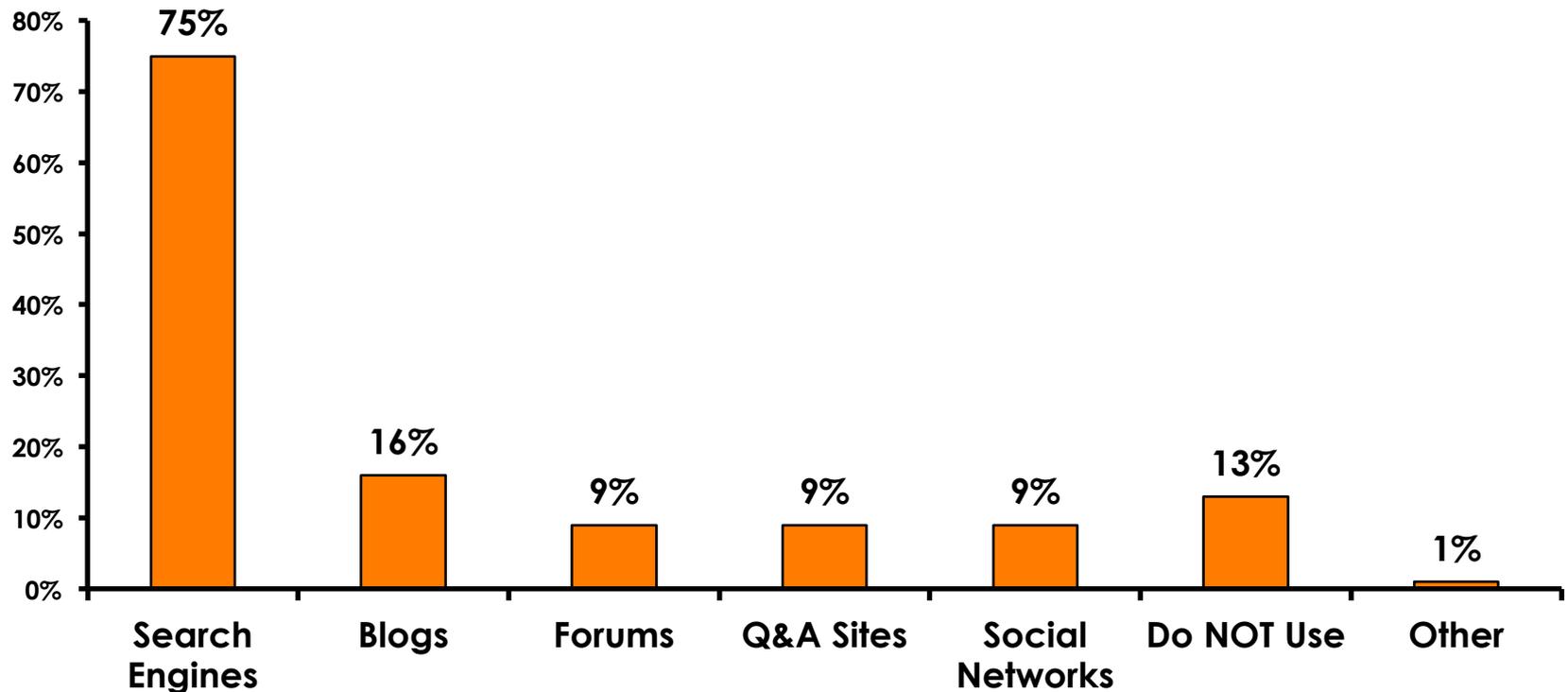
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



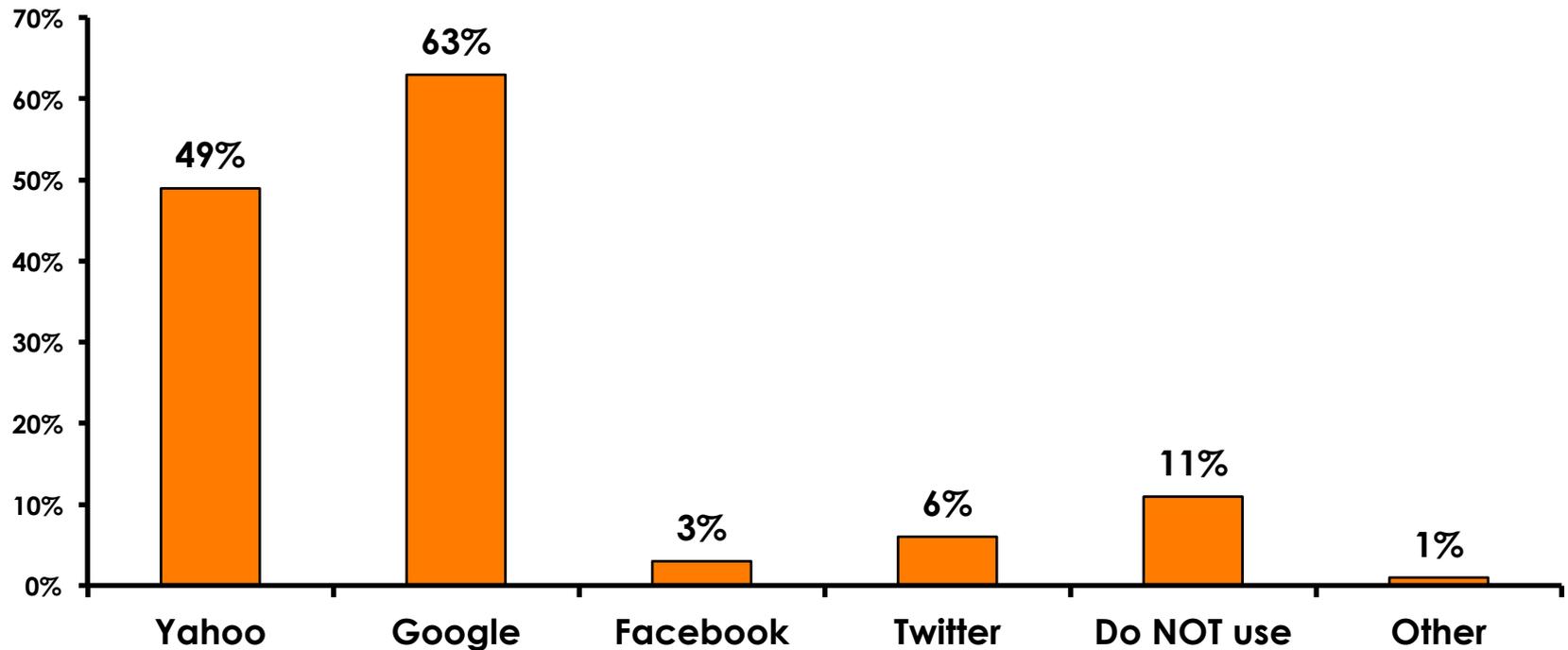
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

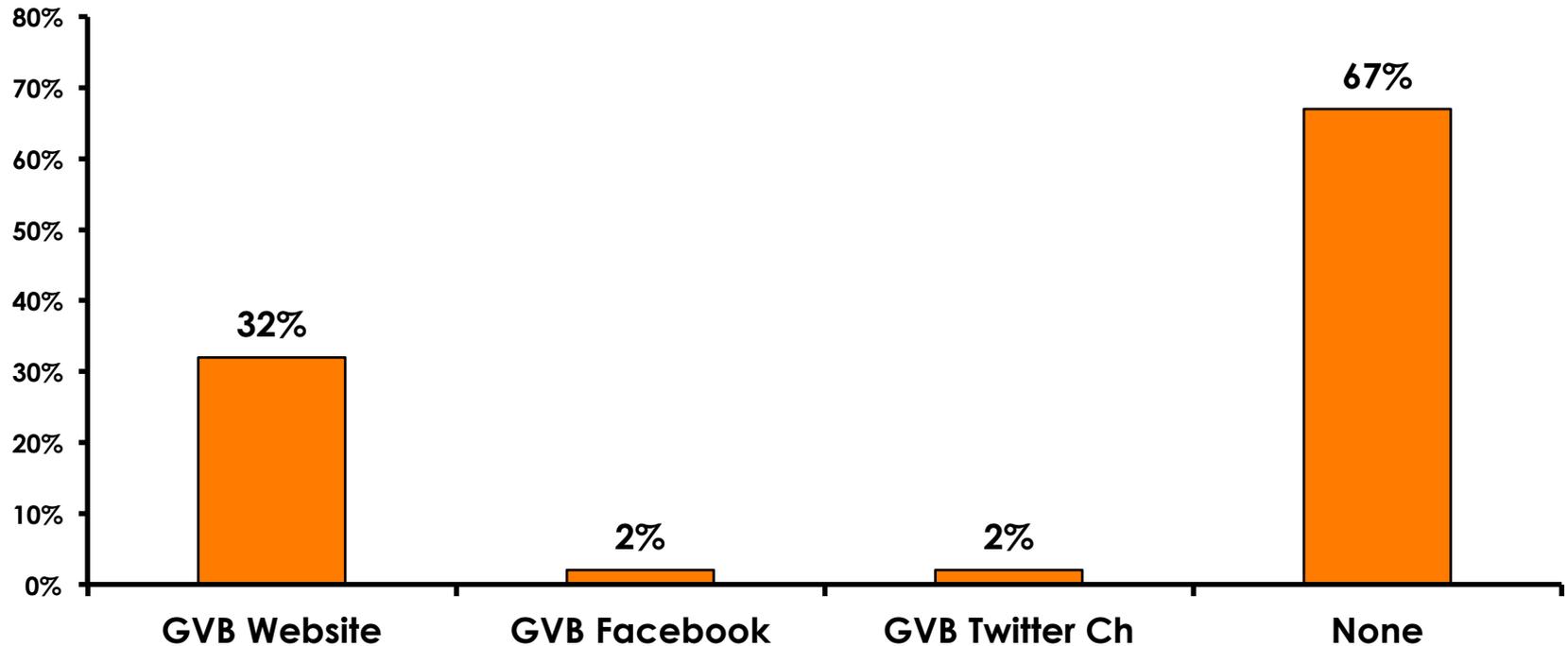


Internet- Things To Do

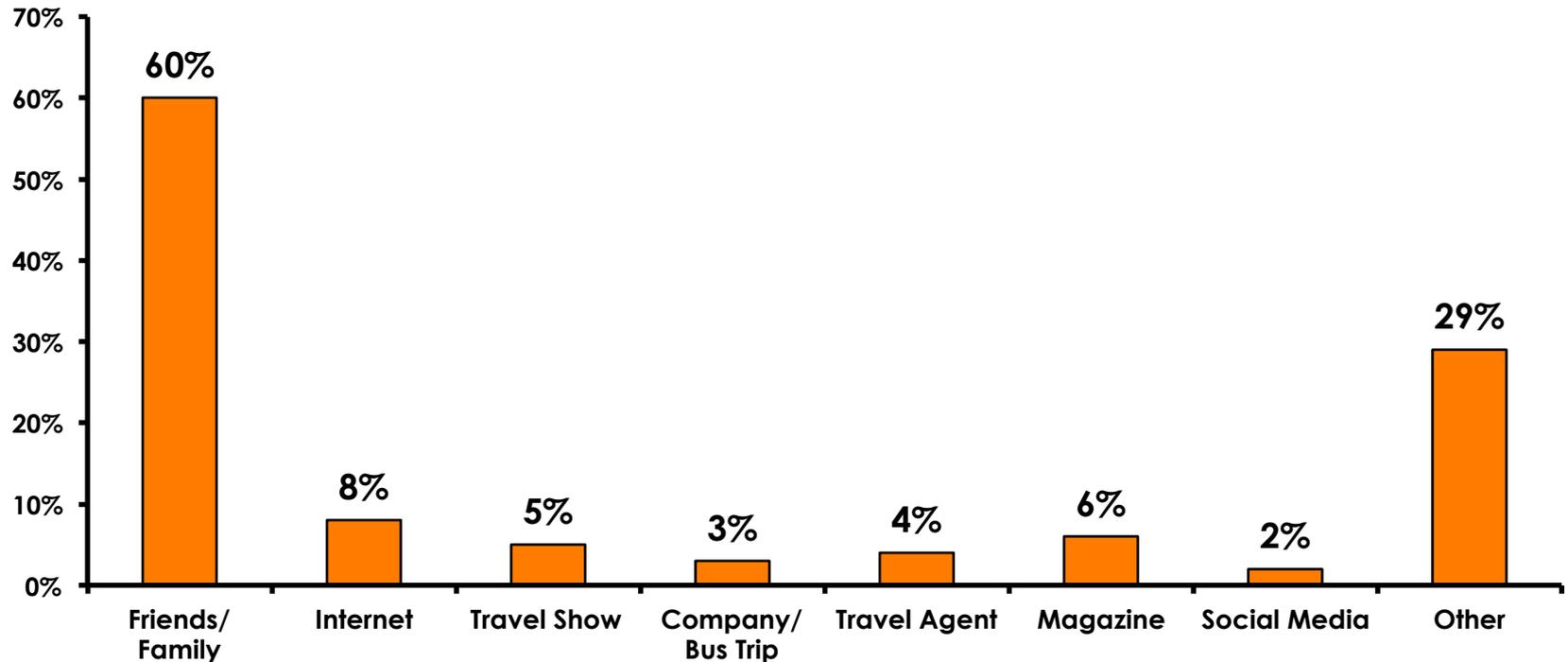
Sources of Info



Internet- GVB Sources

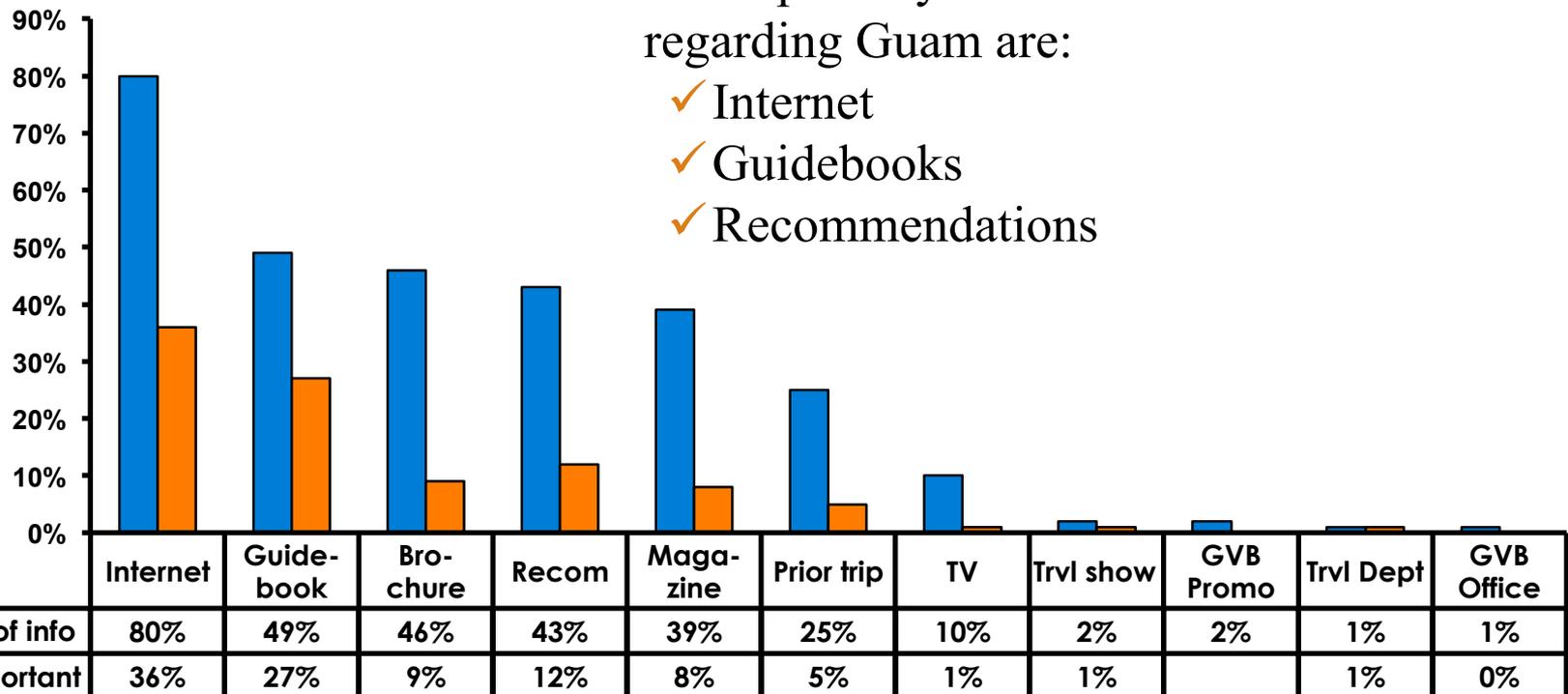


Travel Motivation- Info Sources



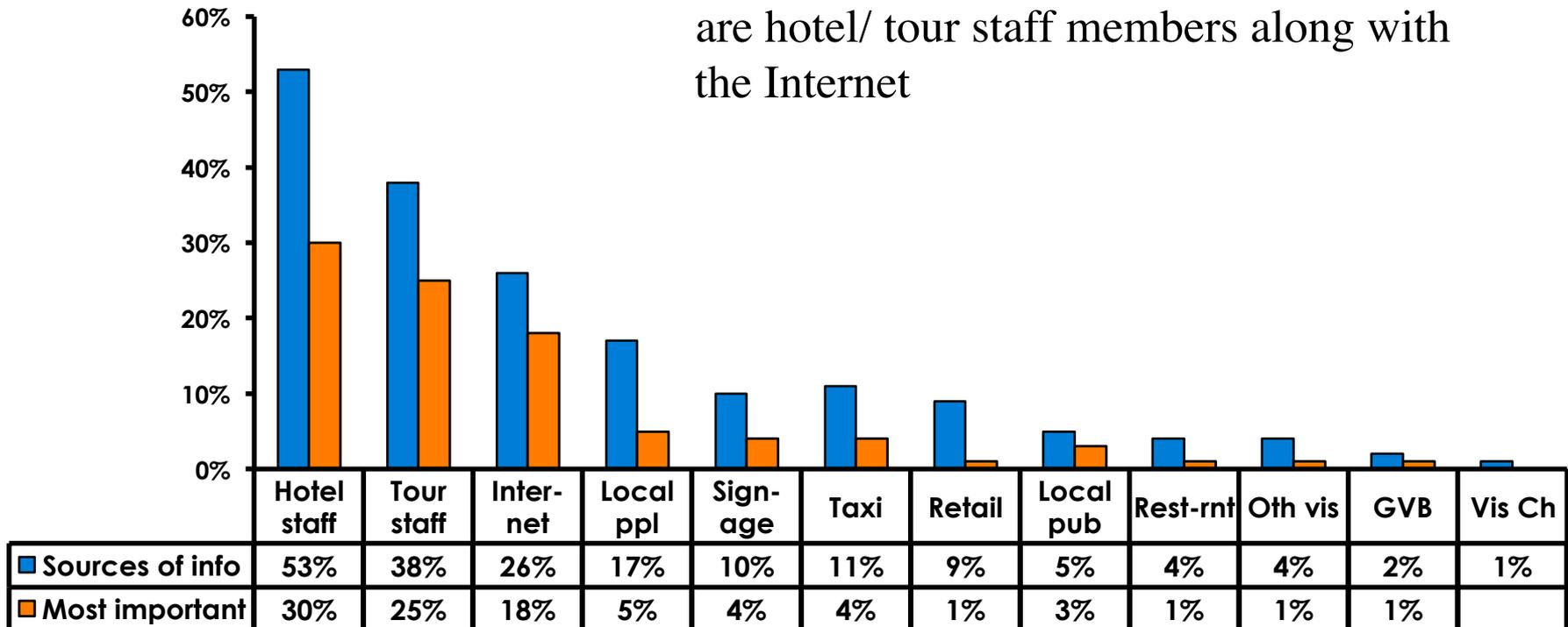
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

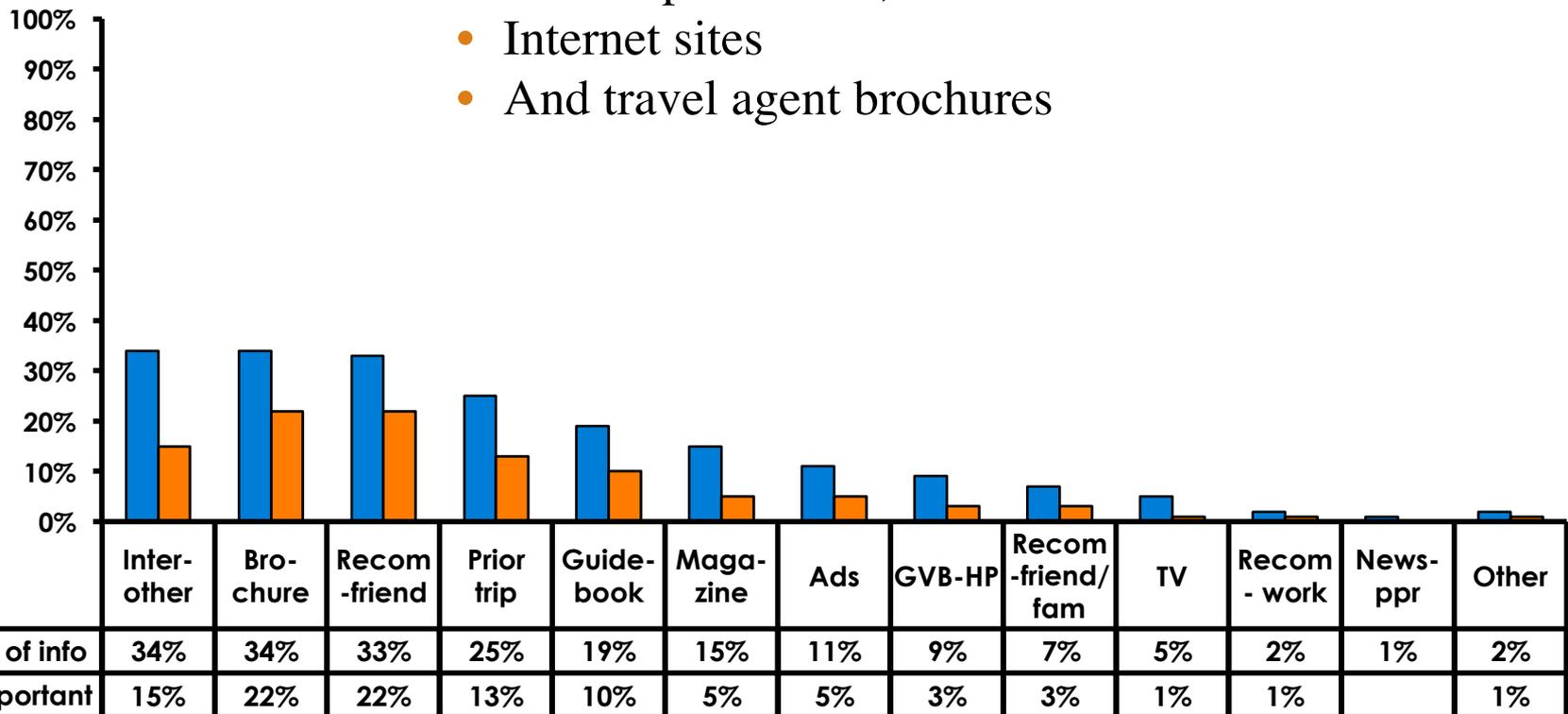
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

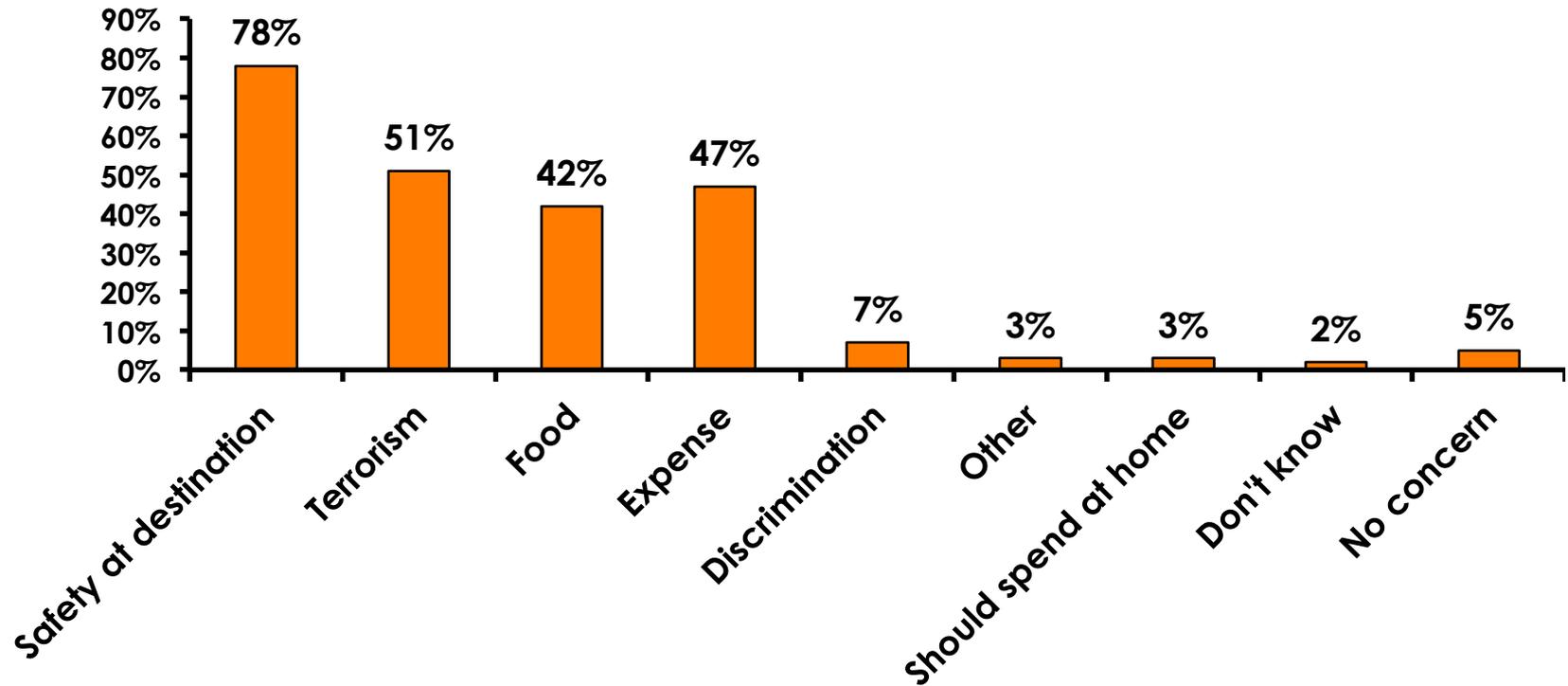
The primary motivational sources of information were.

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



SECTION 6 **OTHER ISSUES**

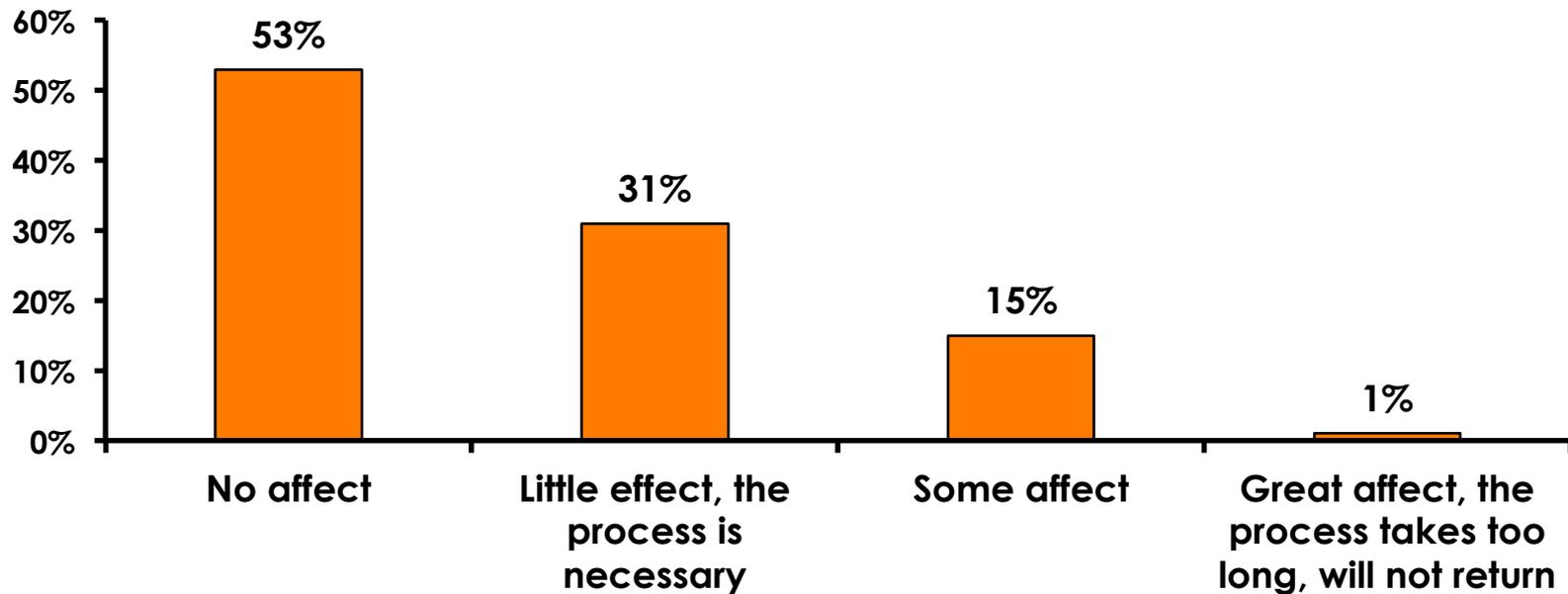
Concerns about travel outside of Japan - Overall



Concerns about travel outside of Japan - By Age & Income

		TOTAL	AGE				Q26							
		-	18-24	25-34	35-49	50+	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q21	Safety	78%	81%	78%	74%	45%	88%	75%	59%	78%	78%	72%	84%	84%
	Terrorism	51%	46%	56%	65%	64%	38%	50%	48%	69%	42%	64%	52%	47%
	Expense	47%	51%	44%	38%	18%	63%	50%	48%	53%	38%	42%	38%	55%
	Food	42%	41%	42%	45%	36%	44%	60%	37%	50%	40%	42%	44%	47%
	Discrimination against Japanese	7%	7%	13%	8%		3%	15%	7%	13%	8%	8%	10%	4%
	No concerns	5%	3%	11%	5%	27%	3%		7%	3%	10%	6%	8%	2%
	Other	3%	3%	4%	3%		3%		11%			4%	2%	6%
	Should spend at home	3%	3%	2%	2%		3%	5%		6%	2%	4%	4%	
	Don't know	2%	1%	4%	2%		3%		4%					4%
	Total	Count	348	225	45	65	11	32	20	27	32	50	50	49

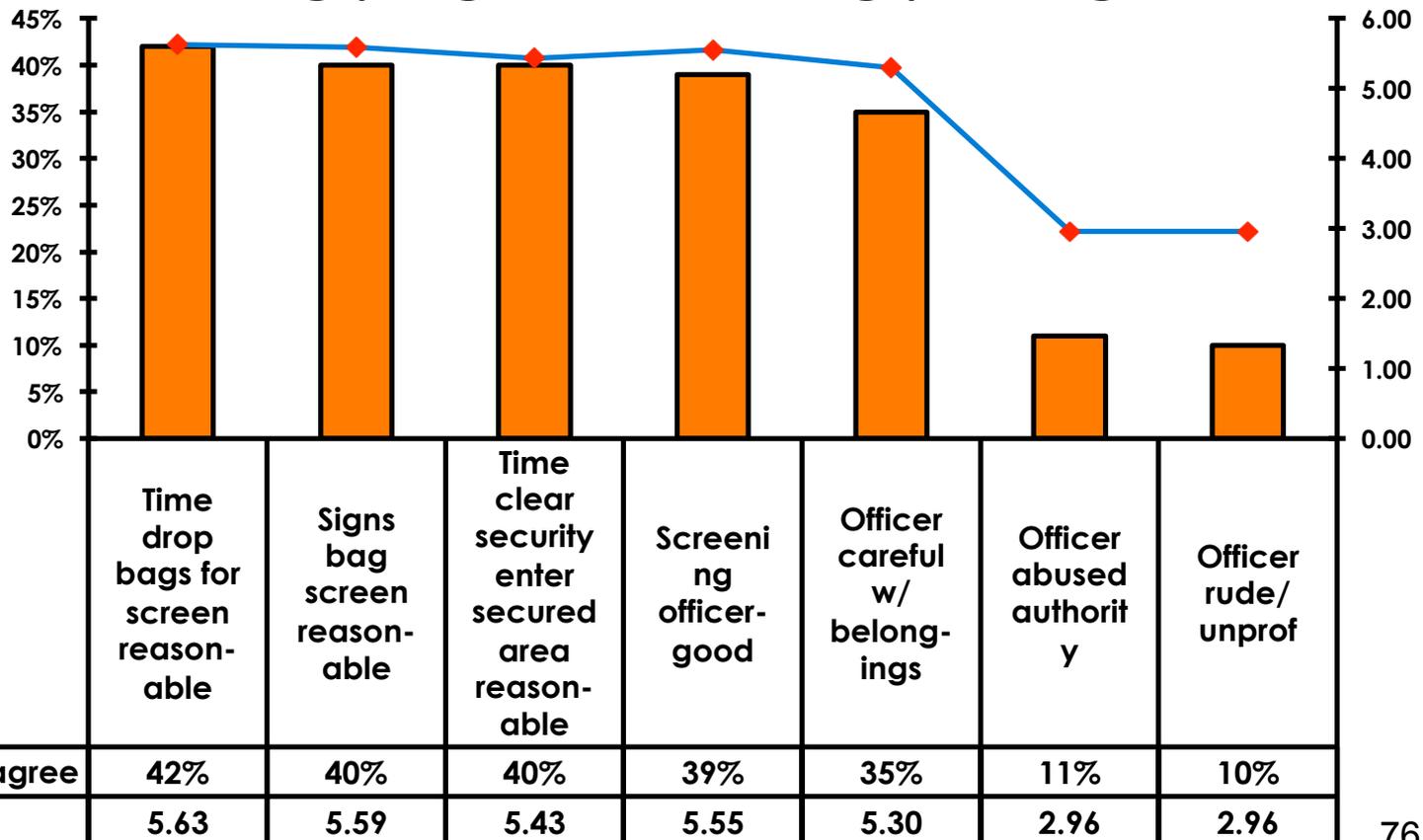
Security Screening/ Immigration Process at Guam International Airport



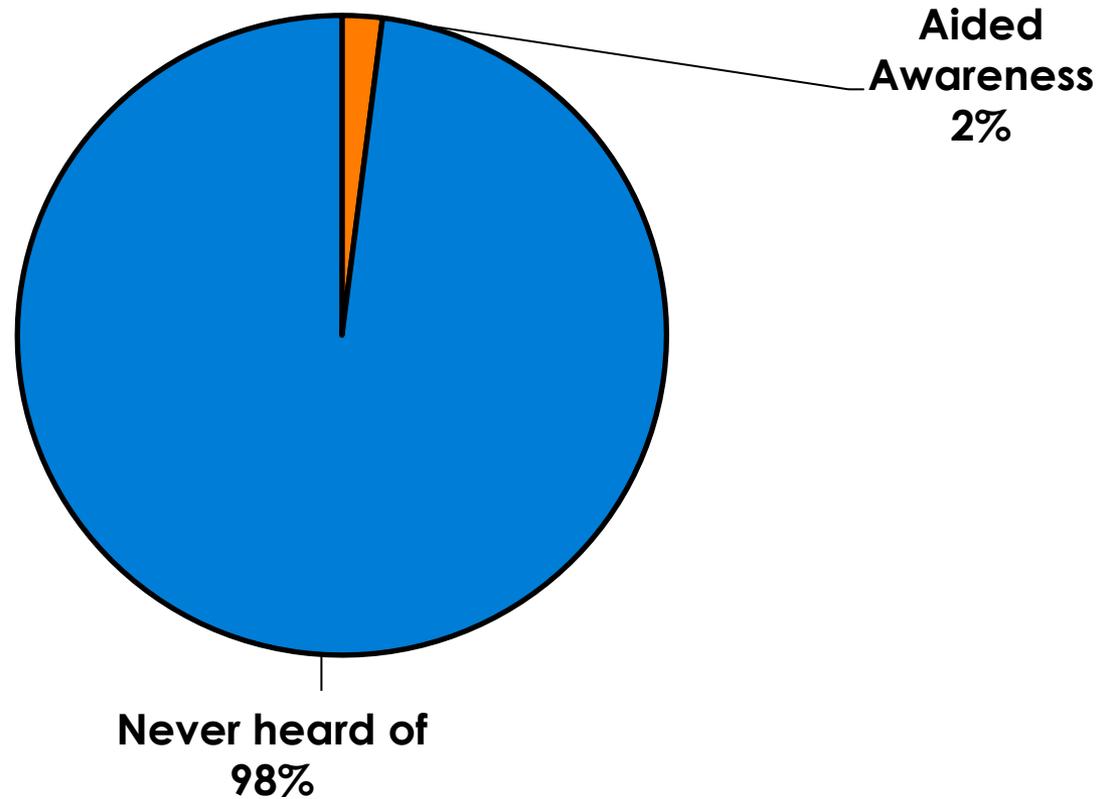
Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



Shop Guam Festival



Shop Guam Festival - Impact

n=6

