



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015

AUGUST 2015



Prepared by: QMark Research

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Background & Methodology

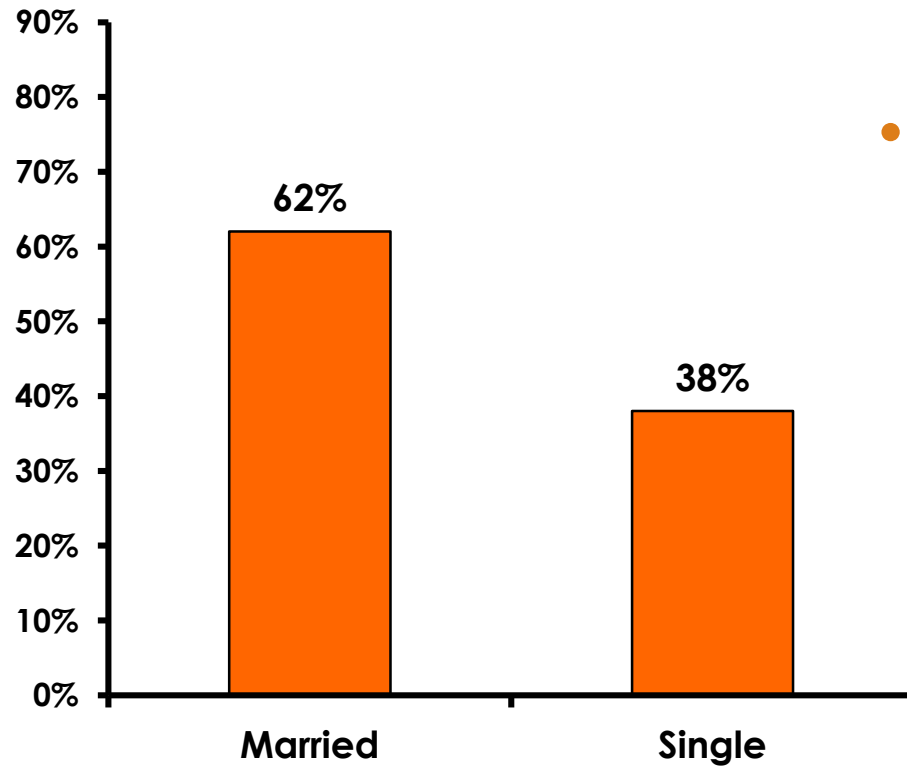
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing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

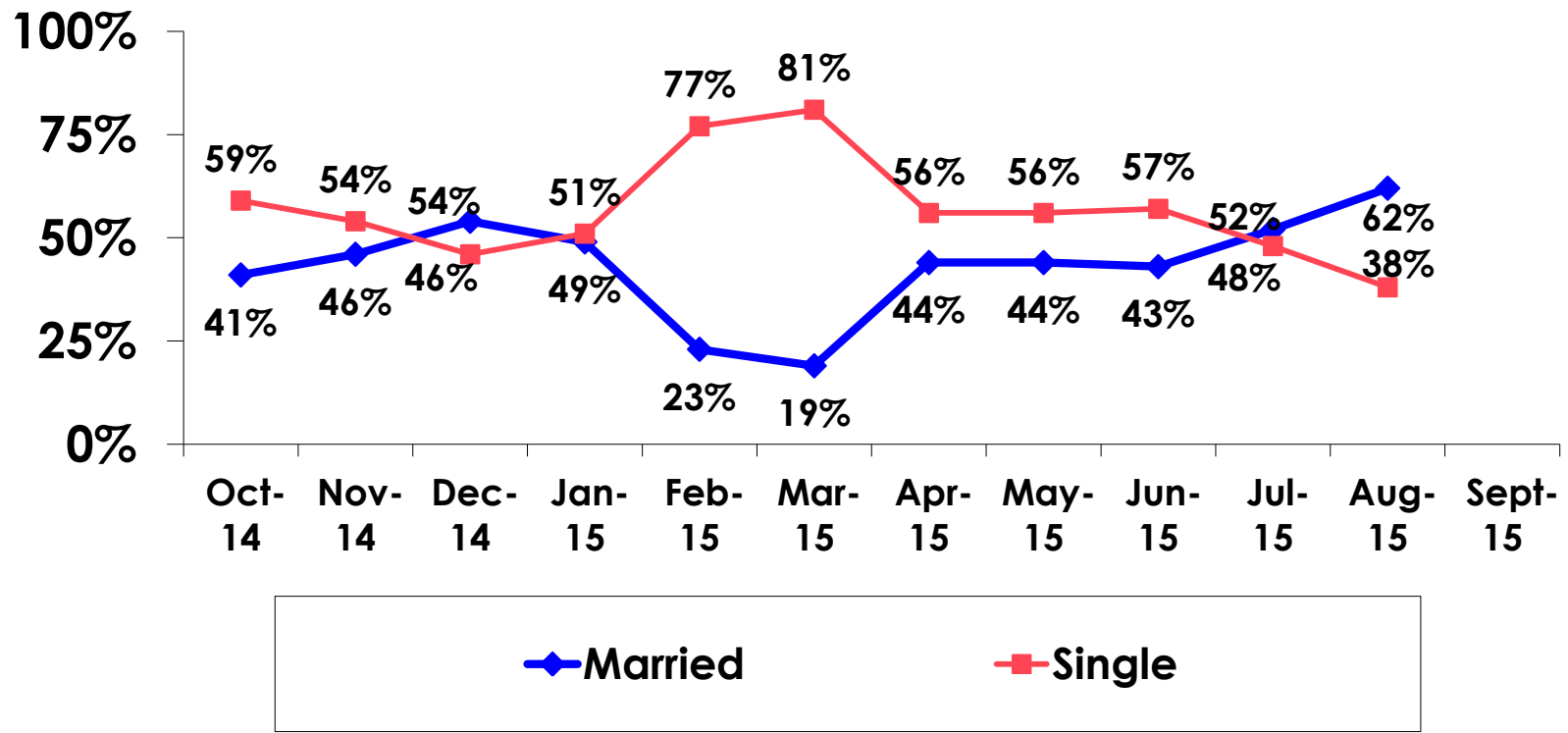
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

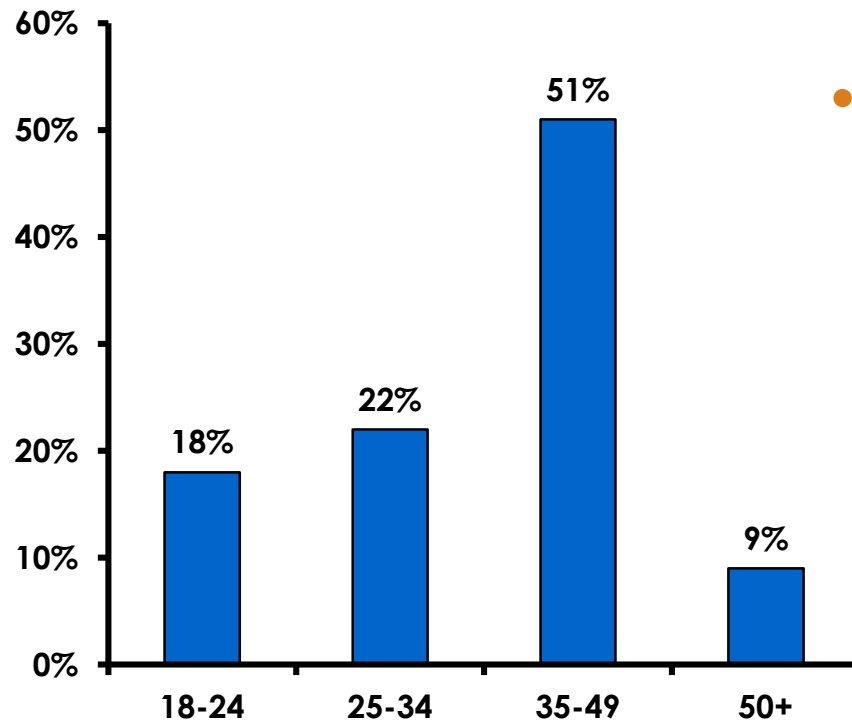


- 71% of repeat visitors are married.

MARITAL STATUS

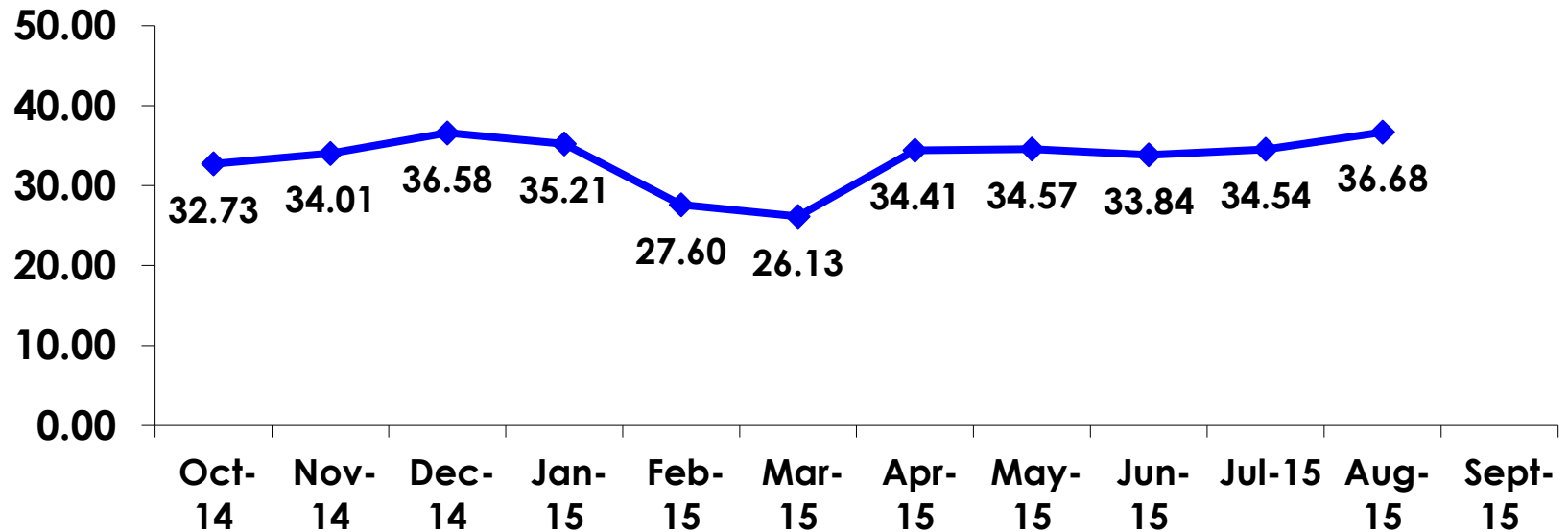


Age - Overall

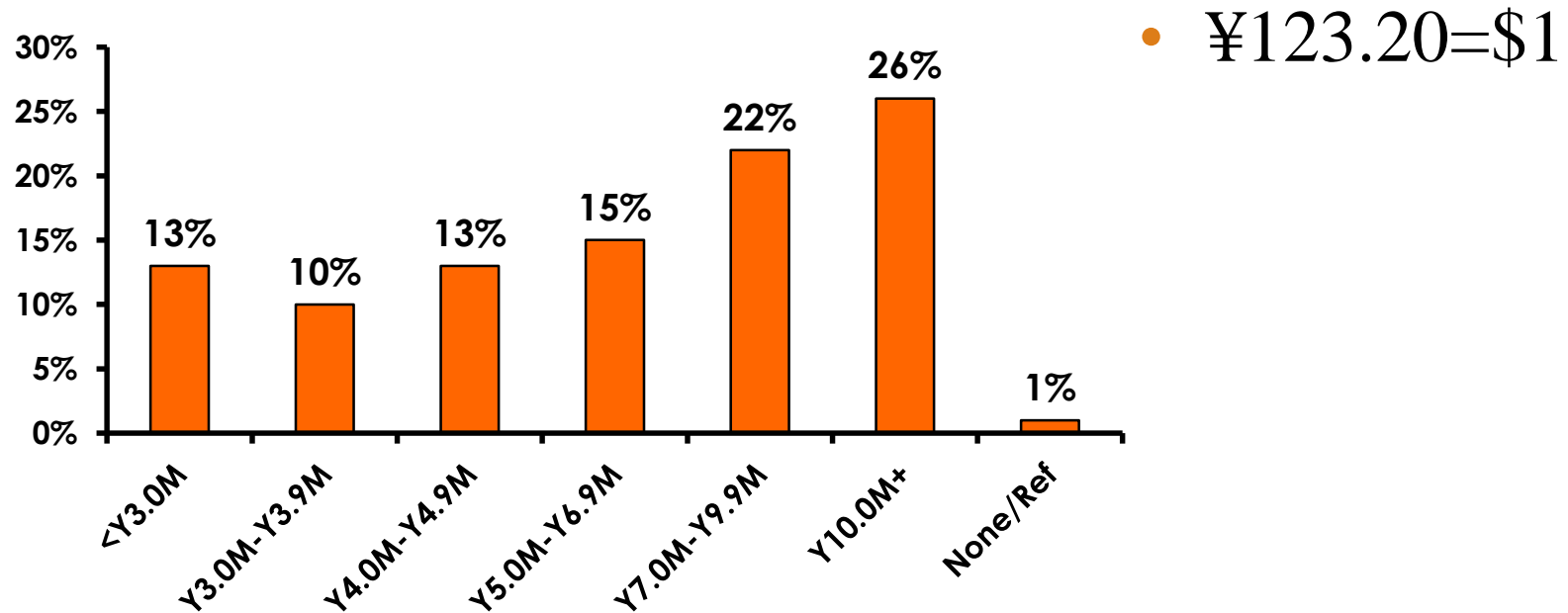


- The average age of the respondents is 36.68 years of age.

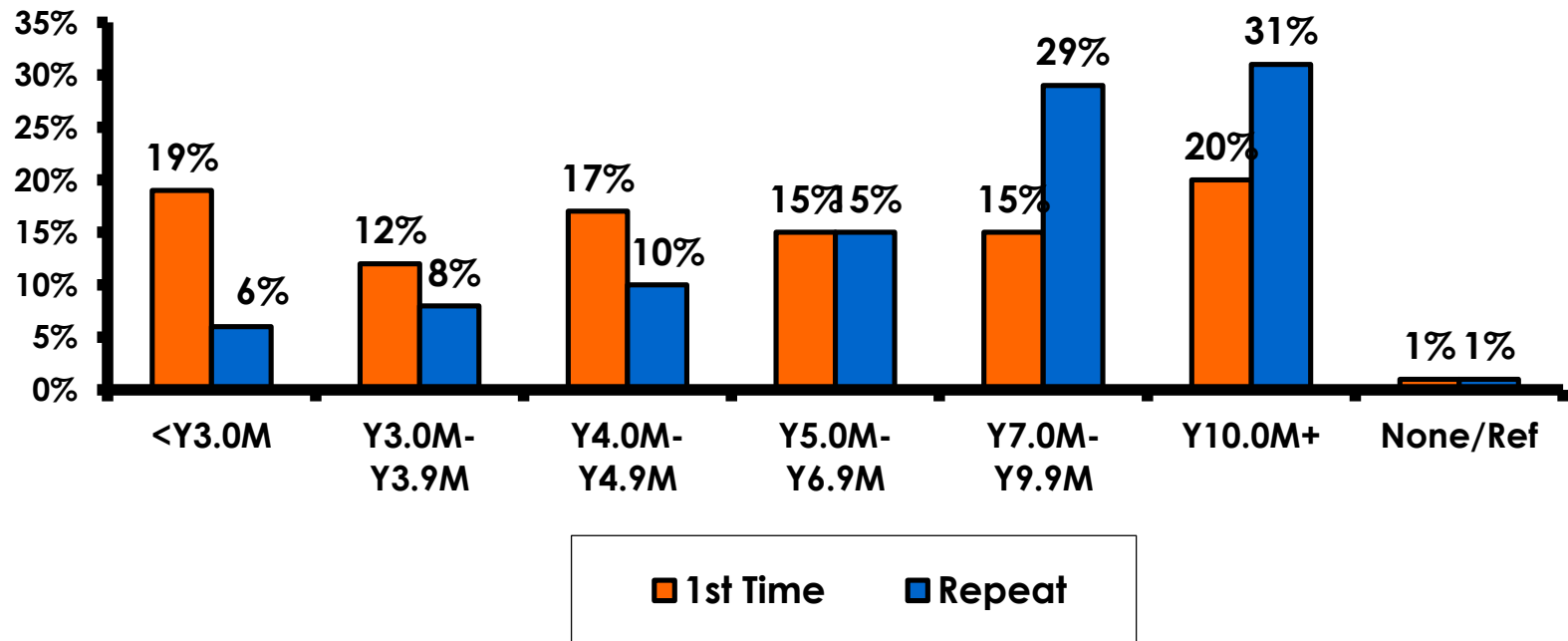
AVERAGE - AGE



Personal Income



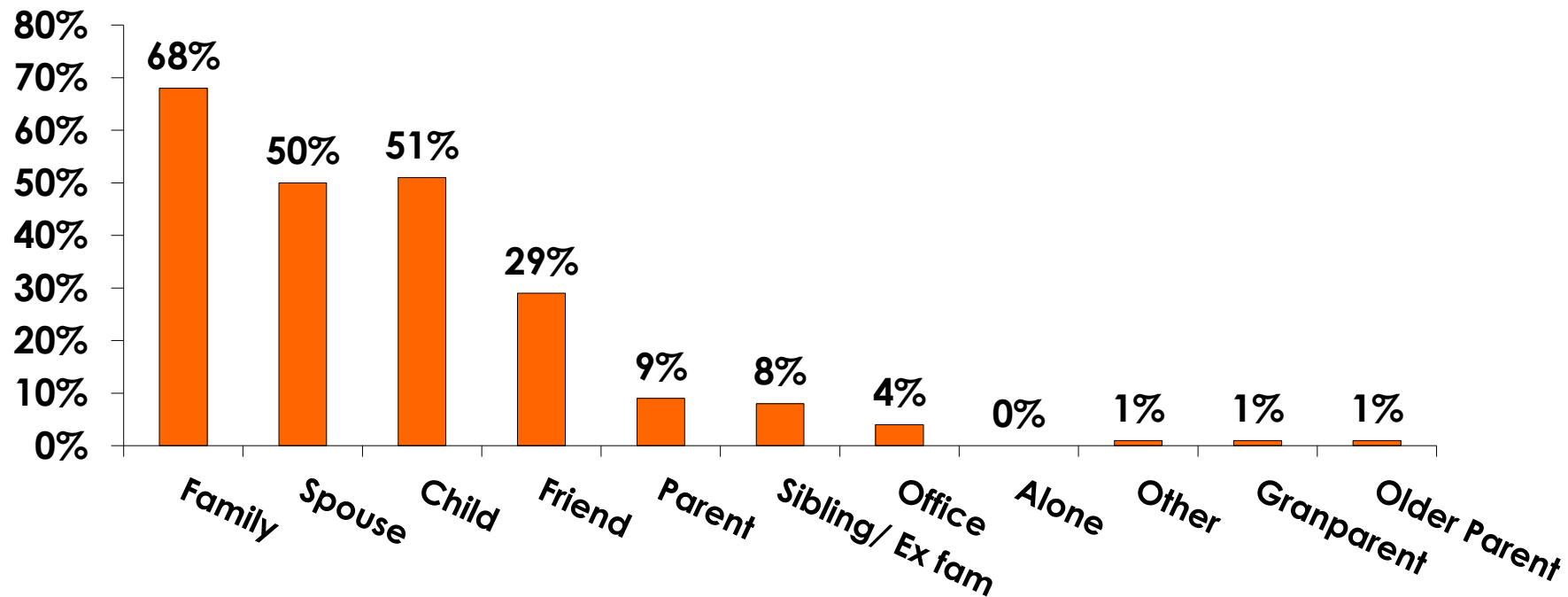
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	14	2	12	7	5	2	
		Column N %	4%	1%	8%	14%	7%	1%	
	Y2.0M-Y3.0M	Count	28	4	24	16	9	3	
		Column N %	9%	2%	15%	33%	13%	2%	
	Y3.0M-Y4.0M	Count	32	11	21	7	18	7	
		Column N %	10%	6%	14%	14%	26%	4%	
	Y4.0M-Y5.0M	Count	44	20	24	5	14	23	2
		Column N %	13%	12%	15%	10%	20%	13%	7%
	Y5.0M-Y7.0M	Count	48	27	21	1	11	29	7
		Column N %	15%	16%	14%	2%	16%	16%	23%
	Y7.0M-Y10.0M	Count	73	46	27	5	4	57	7
		Column N %	22%	27%	17%	10%	6%	32%	23%
	Y10.0M+	Count	84	59	25	7	9	54	13
		Column N %	26%	35%	16%	14%	13%	31%	43%
	No Income	Count	3	2	1	1		1	1
		Column N %	1%	1%	1%	2%		1%	3%
	Total	Count	326	171	155	49	70	176	30

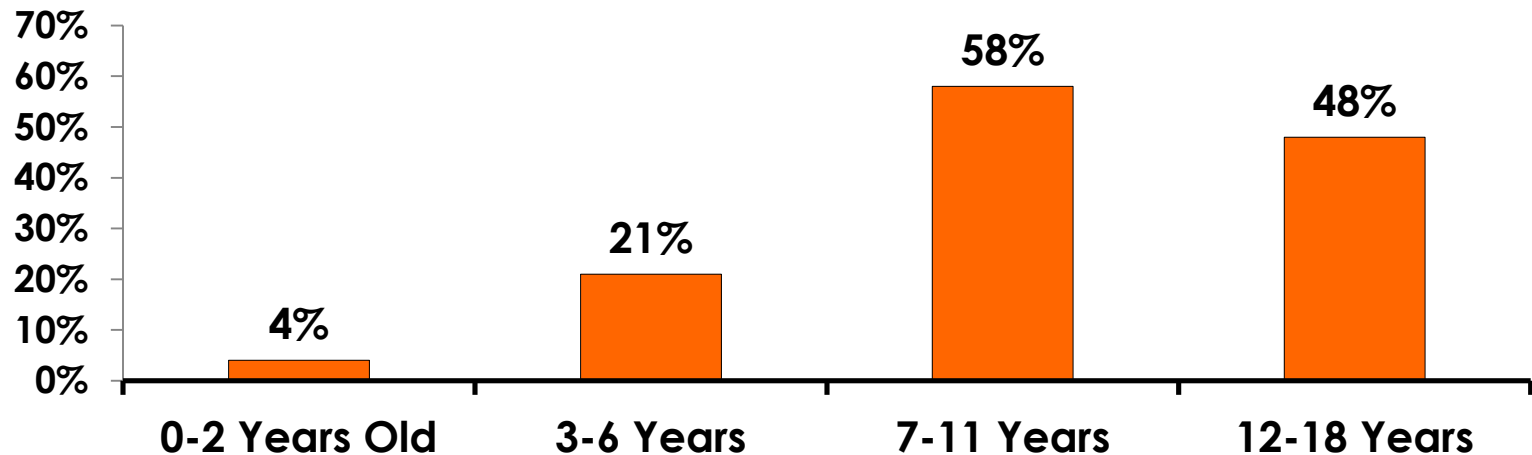
Travel Companions



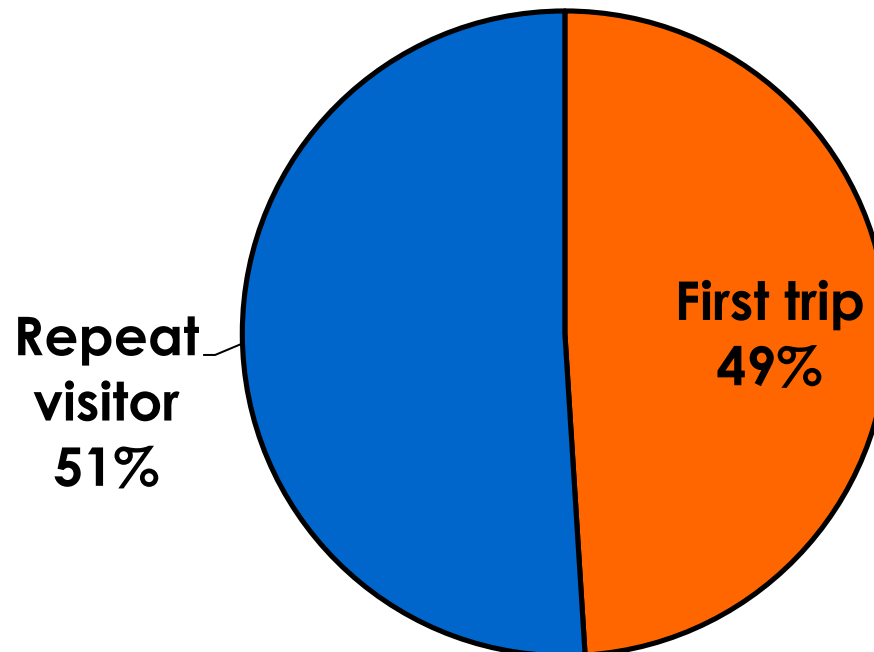
Number of Children Travel Party

N=177 total respondents traveling with children.

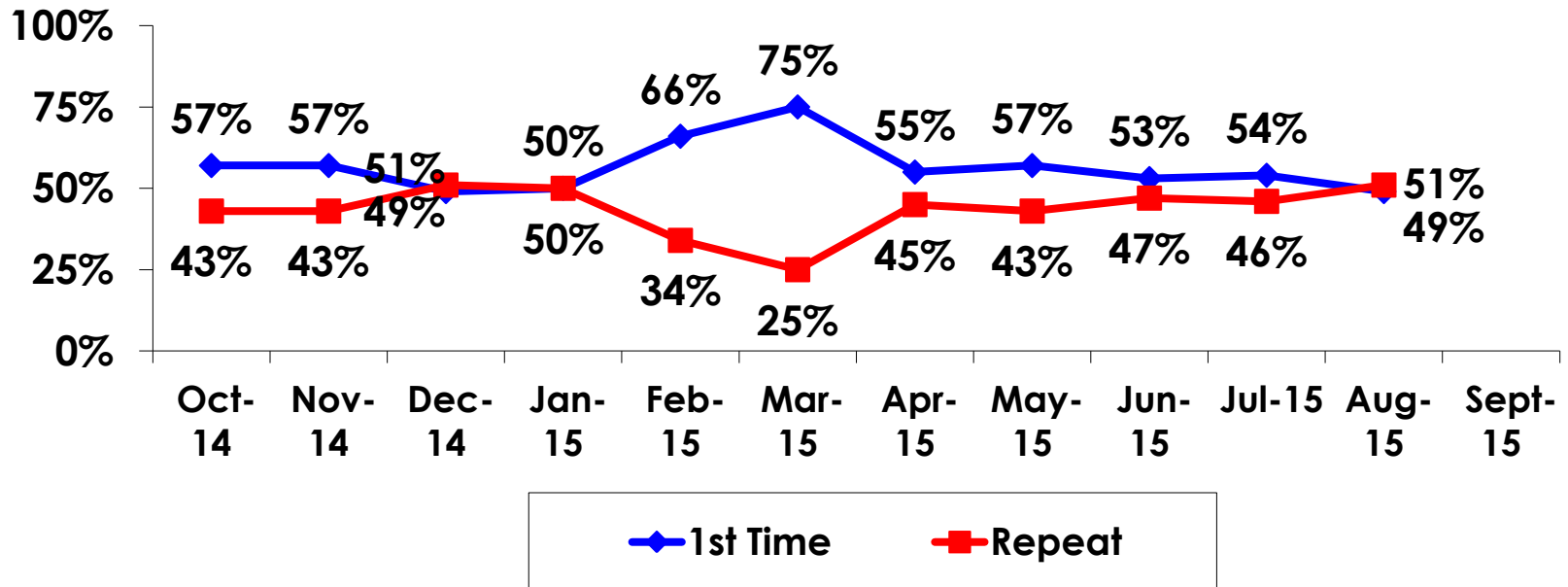
(Of those N=177 respondents, there is a total of 284 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



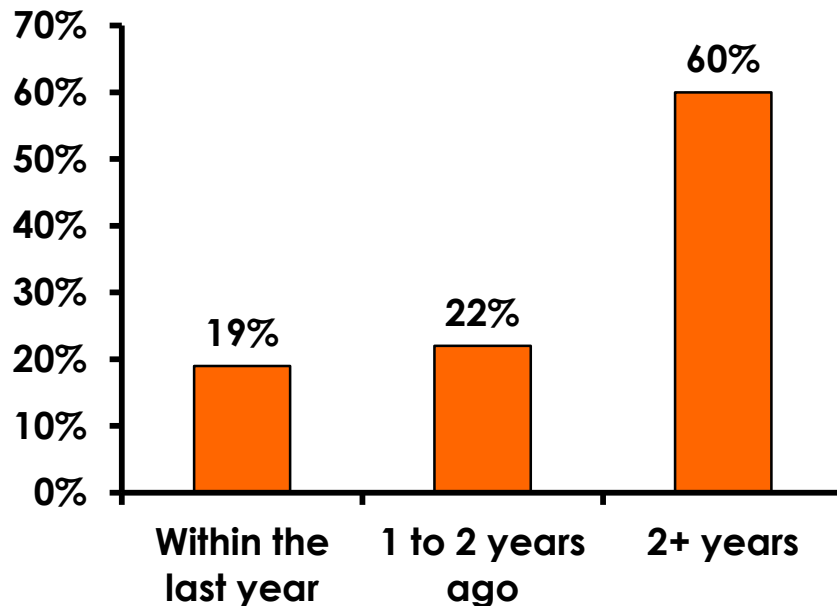
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	178	69	109	
		Column N %	51%	40%	61%	
	Female	Count	174	103	71	
		Column N %	49%	60%	39%	
Total		Count	352	172	180	
AGE	18-24	Count	62	49	13	
		Column N %	18%	29%	7%	
	25-34	Count	76	44	32	
		Column N %	22%	26%	18%	
	35-49	Count	180	66	114	
		Column N %	51%	39%	64%	
	50+	Count	32	12	20	
		Column N %	9%	7%	11%	
	Total		Count	350	171	179

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

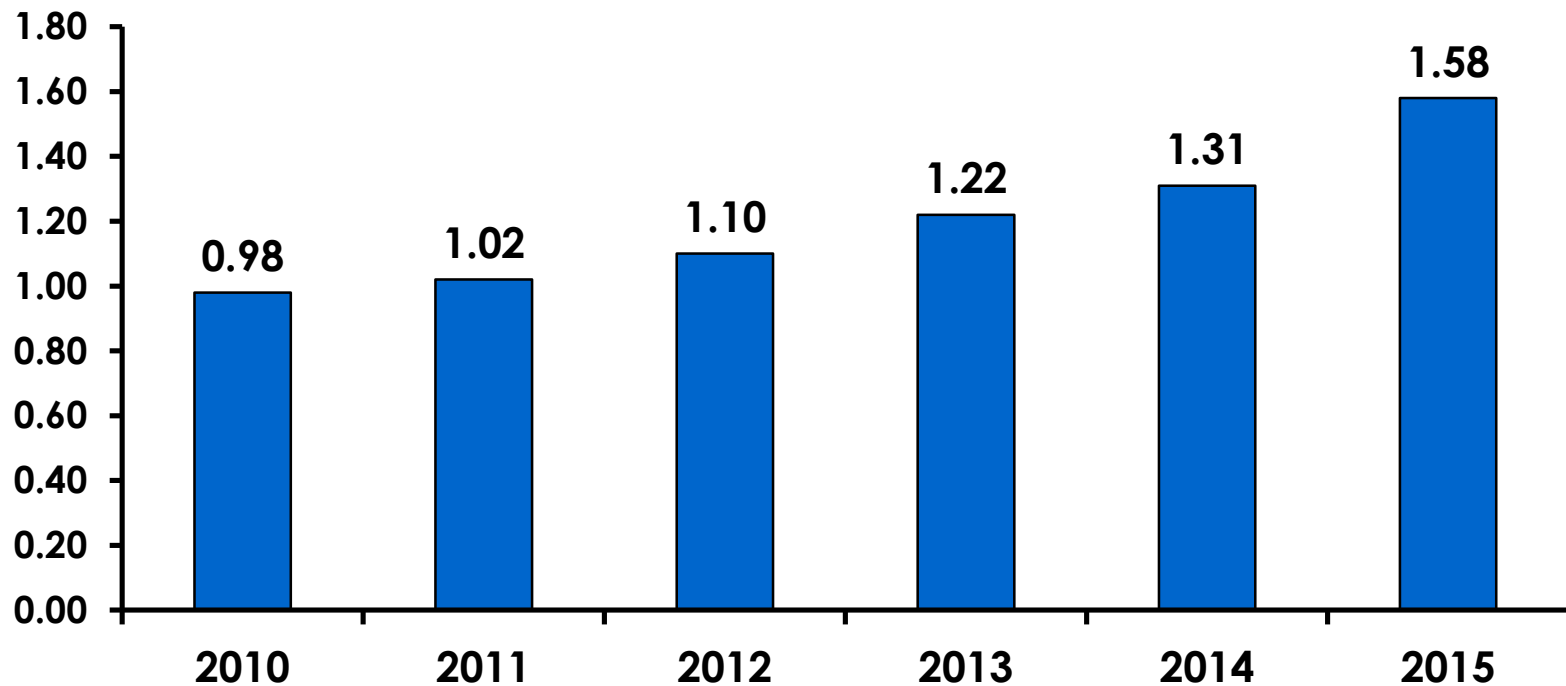
Repeat Visitors Last Trip

n = 176



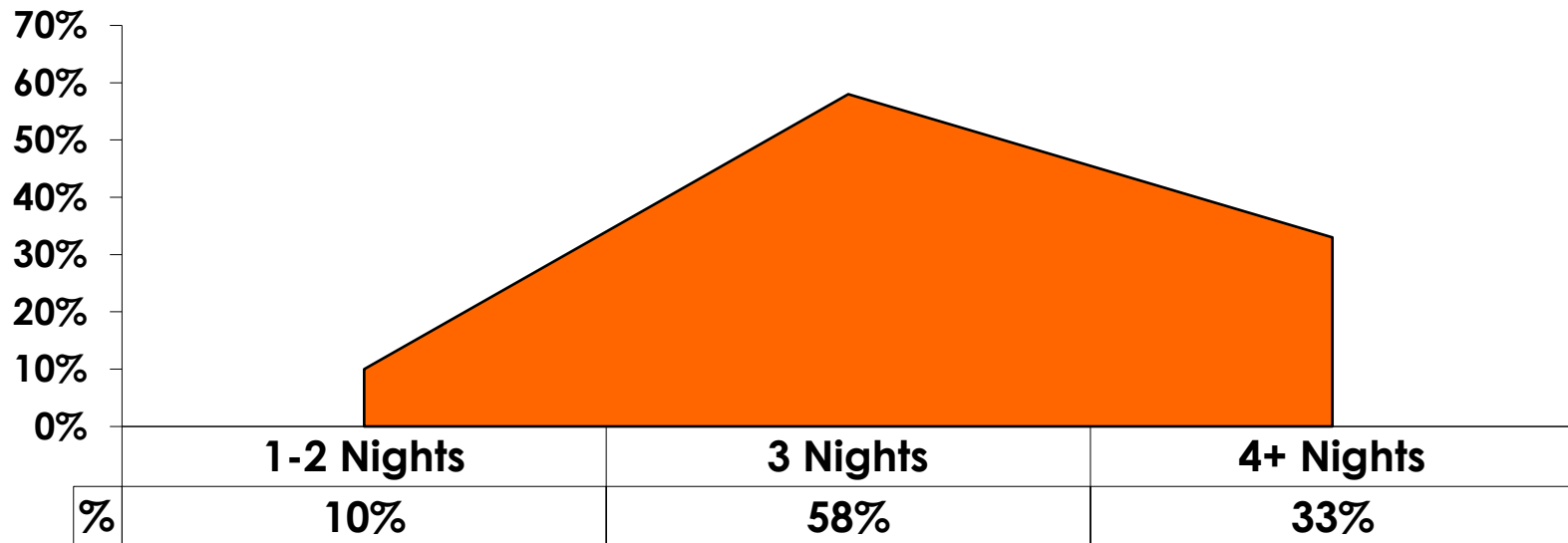
- The average repeat visitor has been to Guam 3.35 times.
- Two in four repeat visitors have been to Guam within the last 2 years.

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

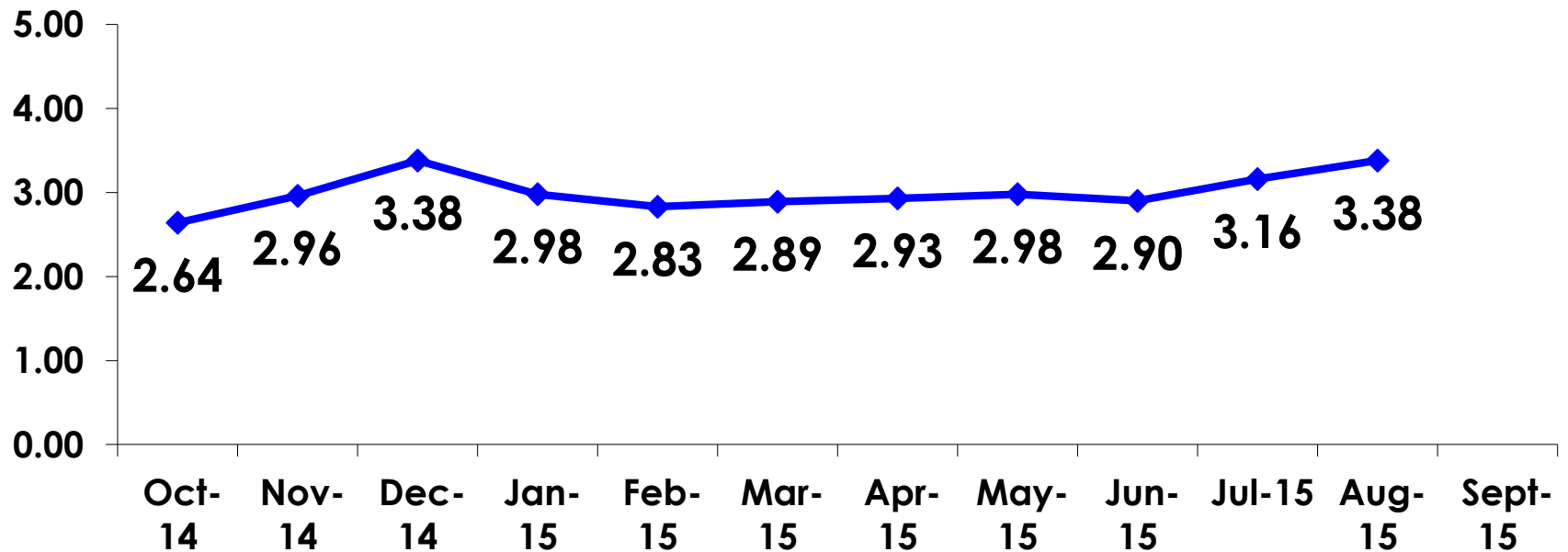


Length of Stay

Mean = 3.38 Days
Median = 3.0 Days



AVG LENGTH OF STAY

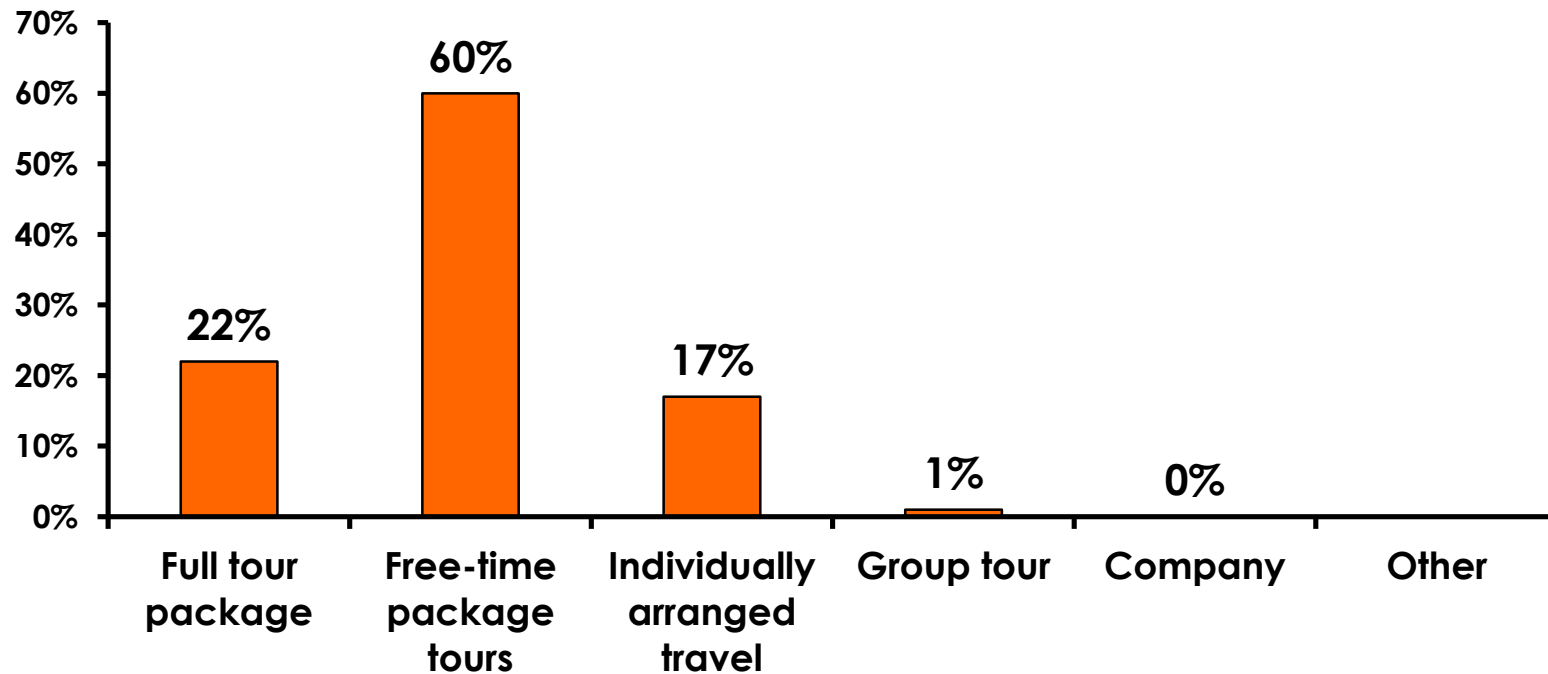


Occupation by Income

		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	16%	7%	25%	28%	20%	21%	12%	10%		
	Homemaker	12%		7%	6%	9%	29%	18%	7%		
	Engineer	12%	14%		9%	16%	8%	16%	12%		
	Teacher	10%	21%	25%	19%	14%	10%	5%	4%		
	Salesperson	10%		11%	19%	11%	8%	18%	6%		
	Manager	9%				2%	2%	11%	24%		
	Student	6%	21%	4%	3%	2%		4%	5%	33%	
	Self-employed	6%		4%		11%	4%	8%	7%	33%	
	Professional/ Specialist	5%	7%	4%	9%	2%	4%	1%	7%		
	Executive (30+ employees)	4%	7%	4%		2%	2%		12%		
	Other	3%	14%	11%	3%	7%	2%				
	Govt- office worker non-mgr	2%		4%	3%	2%	4%	1%		33%	
	Govt- Manager	2%					2%		5%		
	Skilled worker	1%		4%				3%	1%		
	Govt- Executive	1%					2%	1%	1%		
	Freeter	0%	7%								
	Total	Count	346	14	28	32	44	48	73	84	3

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

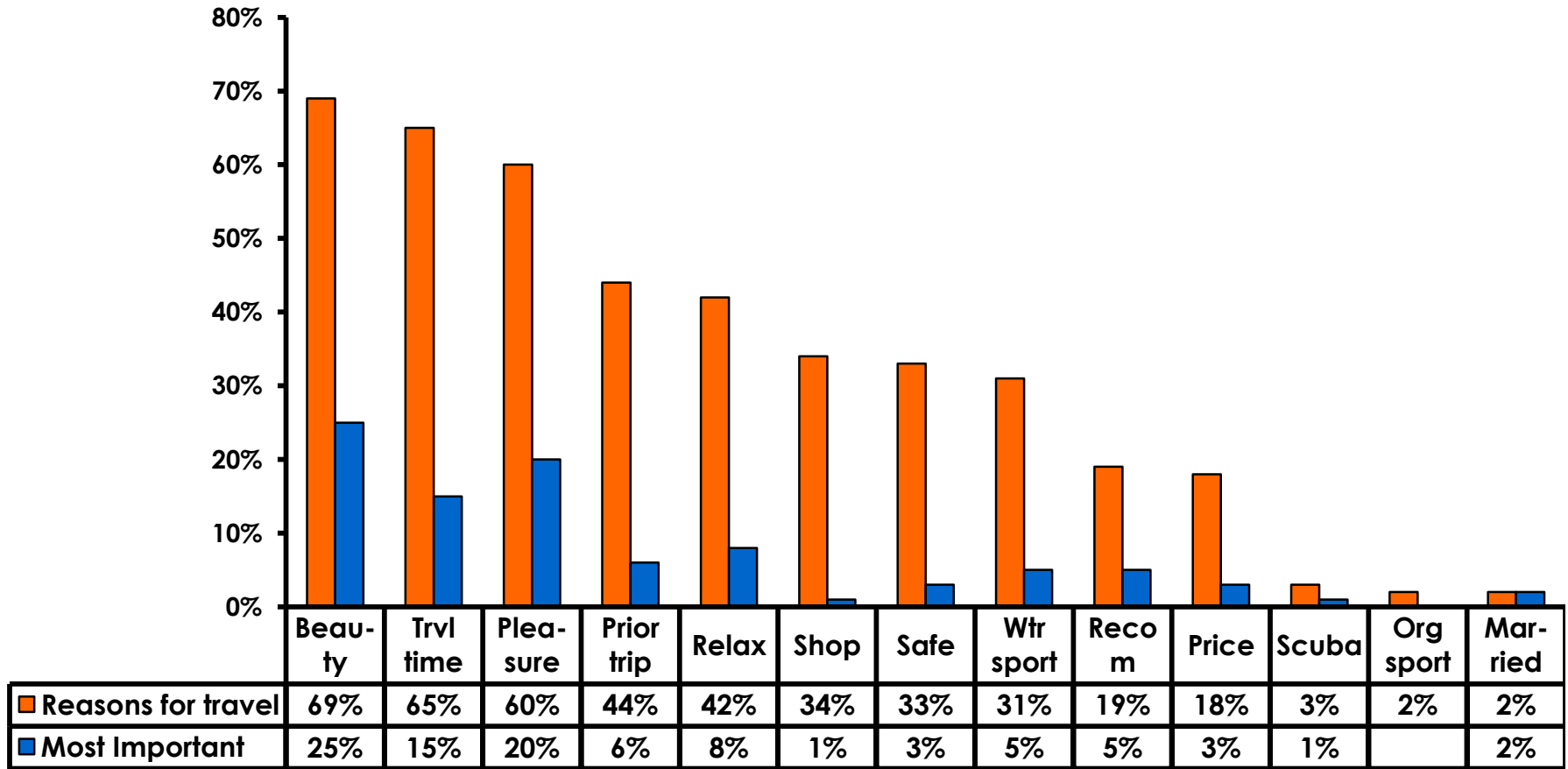


Accommodation by Income

Average length of stay: 3.38 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%	7%	7%	13%	9%	8%	8%	17%		
	Onward Beach Resort	9%			3%	11%	19%	11%	8%		
	Hotel Nikko Guam	9%	7%	4%	6%	11%	13%	5%	15%		
	Guam Plaza Hotel	8%	14%	7%	6%	7%	10%	7%	6%		
	Fiesta Resort Guam	7%		11%	13%	9%	4%	12%	5%		
	Hilton Guam Resort	7%		4%	6%	9%	8%	7%	7%	67%	
	Guam Reef & Olive Spa	6%	7%	4%	3%	7%	6%	8%	6%		
	Holiday Resort Guam	6%	21%	14%	16%		6%	8%	1%		
	PIC Club	6%			6%	9%	6%	8%	6%		
	Westin Resort Guam	6%	14%	7%	6%	2%	4%	4%	8%		
	Pacific Bay Hotel	4%	21%	11%	3%	5%	2%	3%			
	Grand Plaza Hotel	4%		7%	3%	2%		4%			
	Sheraton Laguna Guam	3%		11%		5%	6%		1%		
	Leo Palace Resort	3%			3%	2%	2%	3%	4%	33%	
	Oceanview Hotel	2%		7%	6%	2%					
	Hyatt Regency Guam	2%	7%			2%	2%	3%	1%		
	Aqua Suites	1%			3%			1%	1%		
	Bayview Hotel	1%		7%	3%	2%		1%			
	Dusit Thani Guam	1%						1%	4%		
	Lotte Hotel Guam	1%					2%		4%		
	Pacific Star Resort & Spa	1%				2%		1%	2%		
	Other	1%				2%			1%		
	Condo	1%						3%			
	Verona Resort & Spa	0%							1%		
	Hotel Santa Fe	0%							1%		
	Total	Count	352	14	28	32	44	48	73	84	3

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	69%	84%	66%	66%	66%	68%	70%	
	Short travel time	65%	56%	59%	69%	75%	69%	61%	
	Pleasure	60%	65%	61%	59%	56%	57%	64%	
	Previous trip	44%	16%	32%	57%	56%	53%	34%	
	Relax	42%	50%	45%	36%	53%	39%	45%	
	Shopping	34%	50%	36%	29%	31%	25%	43%	
	Safe	33%	10%	24%	42%	47%	40%	25%	
	Water sports	31%	42%	36%	26%	31%	26%	36%	
	Recomm- friend/family/trvl agnt	19%	40%	18%	14%	13%	13%	26%	
	Price	18%	18%	21%	15%	25%	19%	17%	
	Scuba	3%	6%	4%	2%	3%	4%	2%	
	Golf	3%			3%	9%	4%	1%	
	Other	2%	2%		2%	6%	3%	1%	
	Organized sports	2%	5%		2%	3%	1%	3%	
	Married/ Attn wedding	2%	2%	4%	1%	3%	2%	2%	
	Visit friends/ Relatives	2%	2%	3%	1%	3%	2%	1%	
	Honeymoon	1%		5%			2%		
	Company Sponsored	1%			2%		2%	1%	
	Company/ Business Trip	1%		3%	1%		1%	2%	
	Total	Count	351	62	76	180	32	178	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	69%	64%	79%	69%	66%	60%	66%	73%	67%	
	Short travel time	65%	71%	46%	53%	59%	69%	70%	73%	100%	
	Pleasure	60%	79%	50%	75%	55%	58%	62%	61%	100%	
	Previous trip	44%	36%	11%	34%	36%	50%	59%	55%	33%	
	Relax	42%	71%	29%	47%	39%	35%	40%	46%	67%	
	Shopping	34%	64%	32%	50%	20%	21%	29%	38%	67%	
	Safe	33%	7%	21%	13%	36%	33%	37%	50%		
	Water sports	31%	21%	36%	44%	23%	31%	27%	32%		
	Recomm- friend/family/trvl agnt	19%	29%	18%	28%	27%	21%	11%	14%	33%	
	Price	18%	14%	18%	16%	14%	19%	18%	19%		
	Scuba	3%		4%	6%	5%	4%	4%	2%		
	Golf	3%				2%	2%	1%	7%		
	Other	2%					2%	3%	6%		
	Organized sports	2%			3%		2%	5%	1%		
	Married/ Attn wedding	2%		4%	9%	2%	2%				
	Visit friends/ Relatives	2%		4%	6%				4%		
	Honeymoon	1%			3%	2%	4%				
	Company Sponsored	1%					2%	1%	2%		
	Company/ Business Trip	1%		11%	3%						
	Total	Count	351	14	28	32	44	48	73	84	3

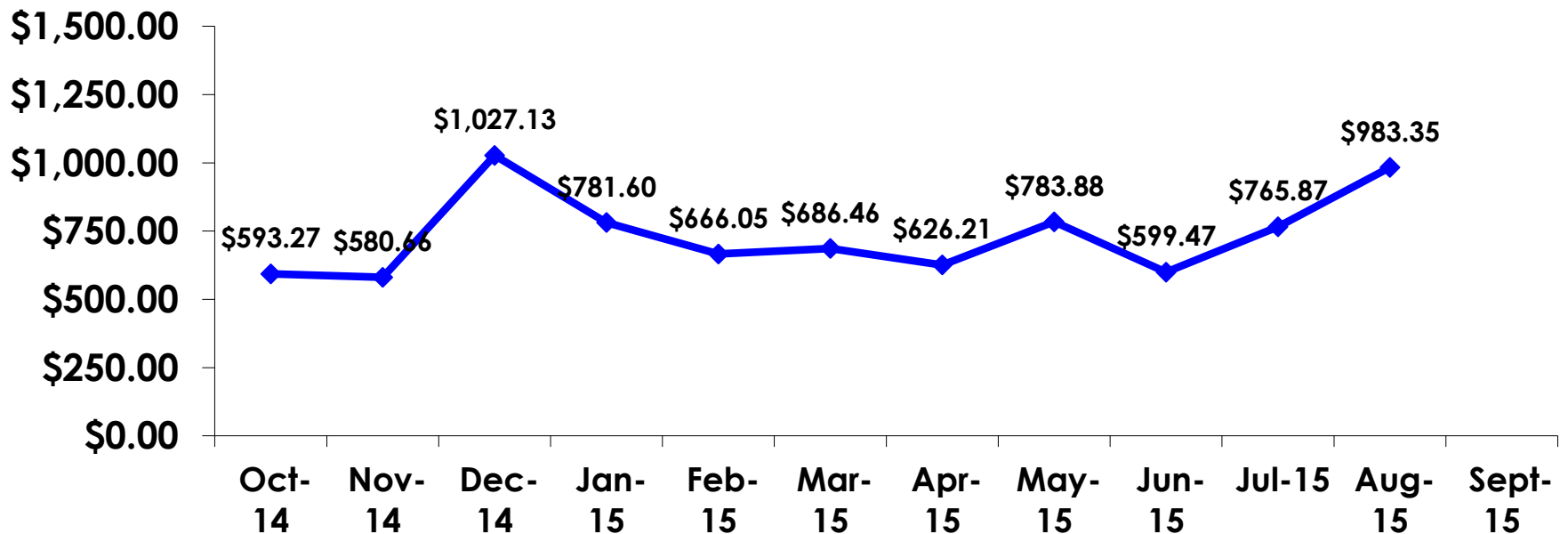
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥123.20/US\$1

- \$2,729.97 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$17,045 = maximum (highest amount recorded for the entire sample)
- \$983.35 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES Per Person



YTD=\$735.90

Breakdown of Prepaid Expenditures

¥123.20=\$1

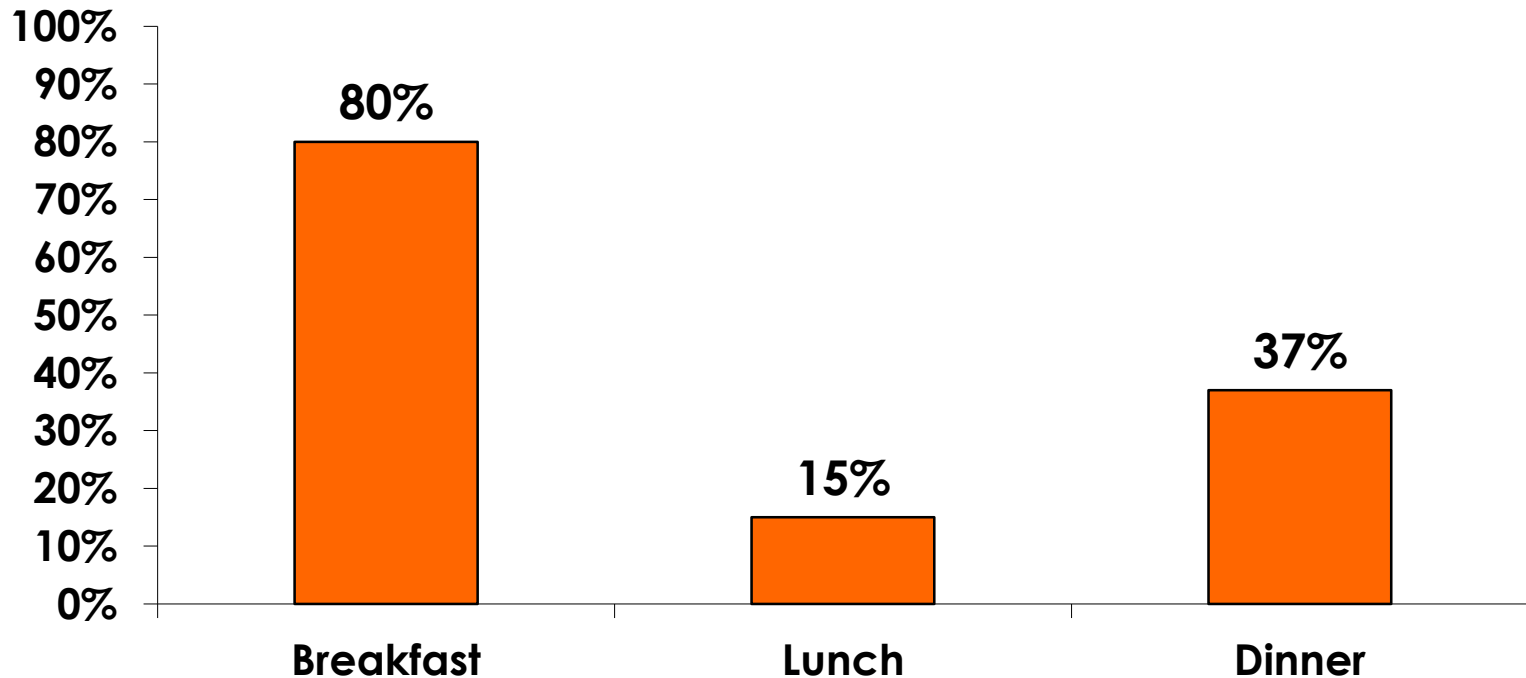
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$2,726.79
Air & Accommodation w/ daily meal package	\$4,236.82
Air only	\$2,308.32
Accommodation only	\$1,361.83
Accommodation w/ daily meal only	\$1,521.92
Food & Beverages in Hotel	\$-
Ground transportation – Japan	\$62.95
Ground transportation – Guam	\$244.72
Optional tours/ activities	\$333.29
Other expenses	\$506.37
Total Prepaid	\$2,729.97

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=41

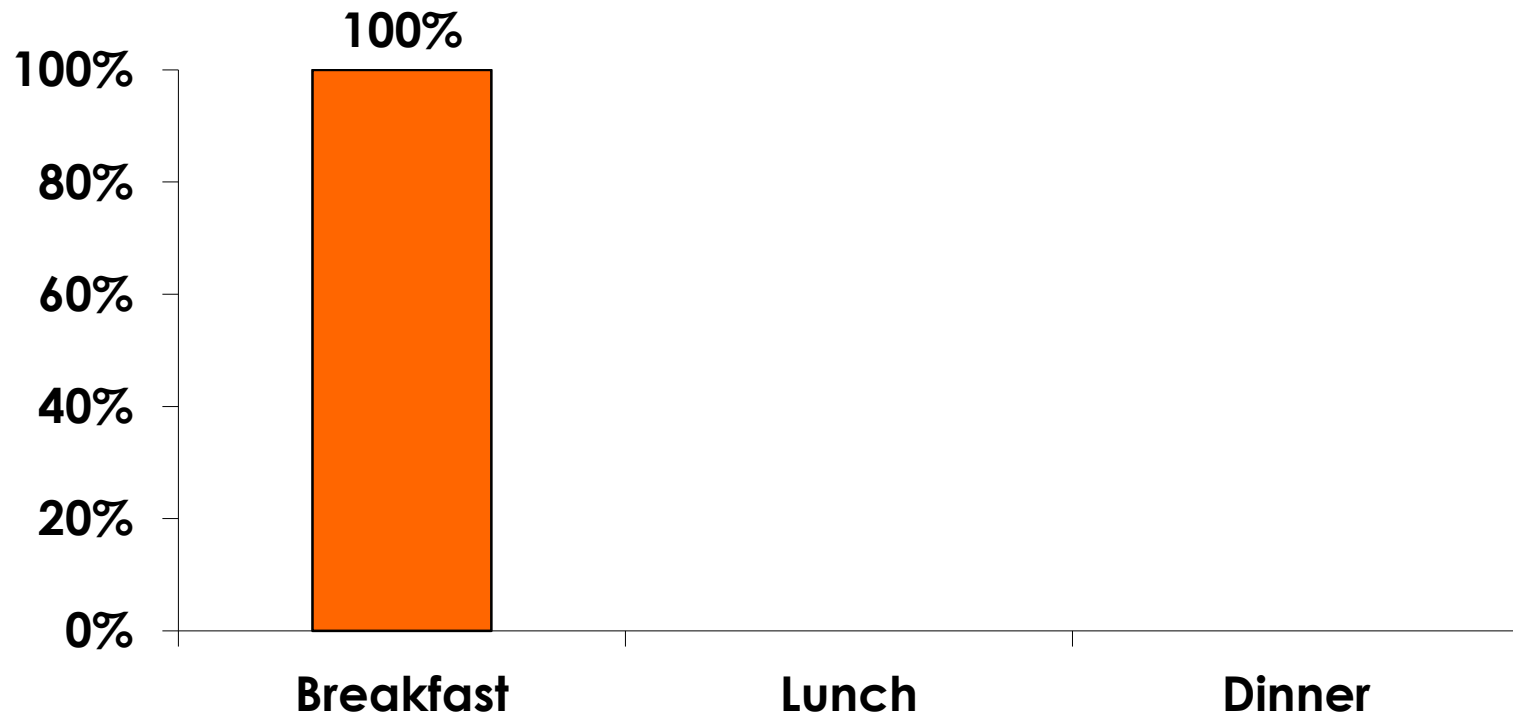


Mean=4,236.82 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

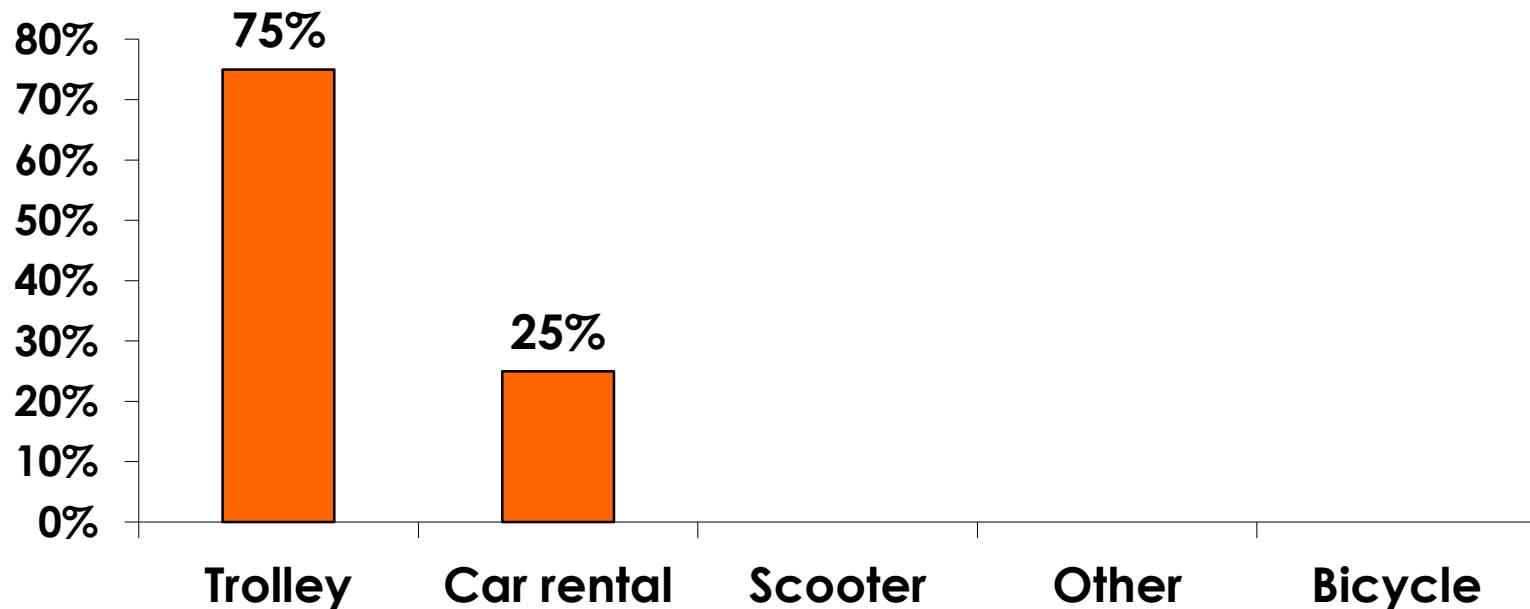
n=3



Mean=\$1,521.92 per travel party

PREPAID GROUND TRANSPORTATION

n=4



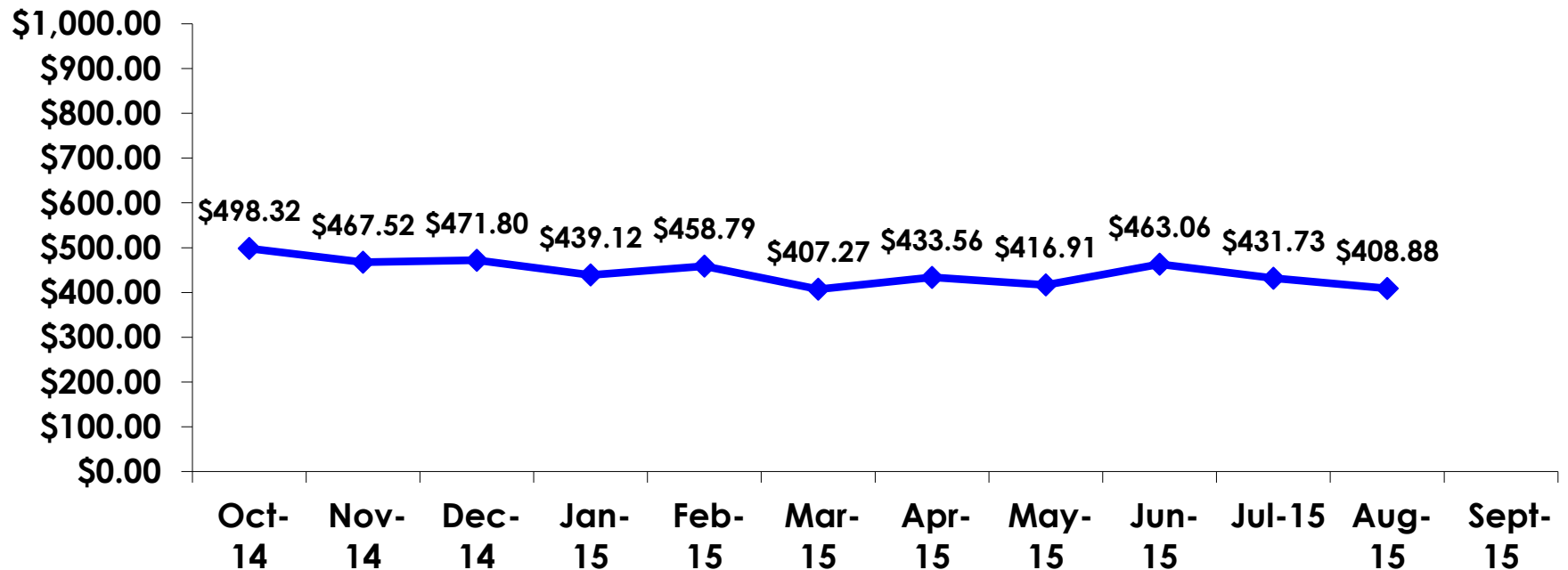
Mean=\$244.72 per travel party

On-Island Expenditures

- \$996.20 = 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)
- \$408.88 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

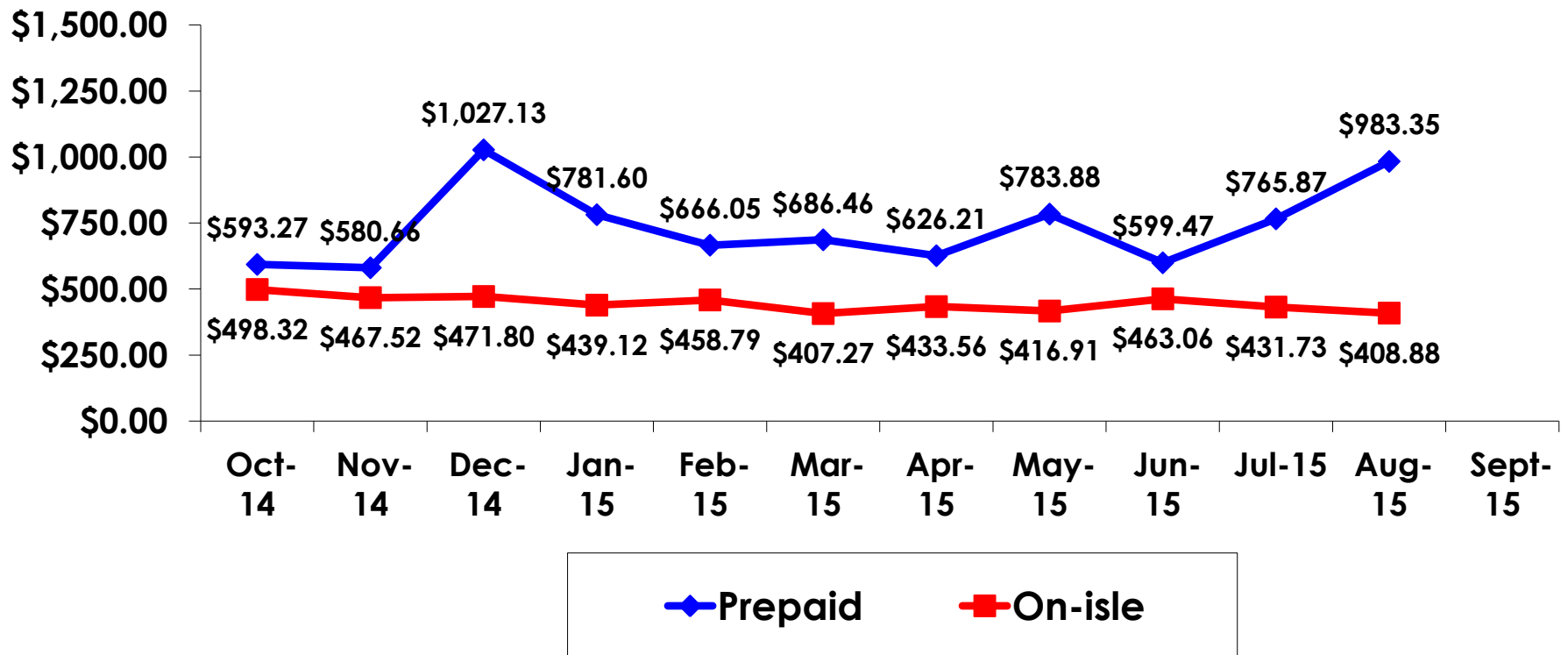


YTD = \$445.13

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$735.90

On-Isle YTD = \$445.13



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	\$408.88	\$377.29	\$441.18	\$295.83	\$341.50	\$370.96	\$471.35	\$387.67	\$501.99	\$411.75	\$704.76
	Median	\$313	\$300	\$347	\$270	\$325	\$267	\$425	\$315	\$400	\$300	\$500
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$108
	Maximum	\$2,500	\$2,500	\$2,500	\$667	\$904	\$2,500	\$1,980	\$1,600	\$1,700	\$1,500	\$2,500

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$65.61	\$91.92	\$38.70	\$7.15	\$33.72	\$94.26	\$97.59
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$14
F&B FF/STORE	Mean	\$46.53	\$56.77	\$36.06	\$24.65	\$31.54	\$59.52	\$52.66
	Median	\$10	\$20	\$3	\$0	\$3	\$25	\$35
F&B RESTRNT	Mean	\$123.65	\$173.16	\$73.01	\$30.47	\$72.58	\$160.19	\$221.41
	Median	\$30	\$70	\$20	\$0	\$50	\$55	\$150
OPT TOUR	Mean	\$104.32	\$129.66	\$78.40	\$26.50	\$66.29	\$135.17	\$178.44
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$189.53	\$181.58	\$197.67	\$126.05	\$163.16	\$178.94	\$434.13
	Median	\$30	\$15	\$30	\$0	\$50	\$20	\$136
GIFT- OTHER	Mean	\$110.36	\$125.22	\$95.16	\$49.56	\$78.87	\$133.17	\$178.44
	Median	\$50	\$80	\$35	\$0	\$60	\$50	\$100
TRANS	Mean	\$18.15	\$27.07	\$9.02	\$6.13	\$8.24	\$21.62	\$45.16
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$353.97	\$399.30	\$307.61	\$209.66	\$199.07	\$464.93	\$399.50
	Median	\$0	\$0	\$0	\$70	\$0	\$0	\$15
TOTAL	Mean	\$996.20	\$1,159.40	\$829.25	\$480.15	\$638.88	\$1,222.80	\$1,607.31
	Median	\$700	\$850	\$500	\$400	\$500	\$905	\$1,000

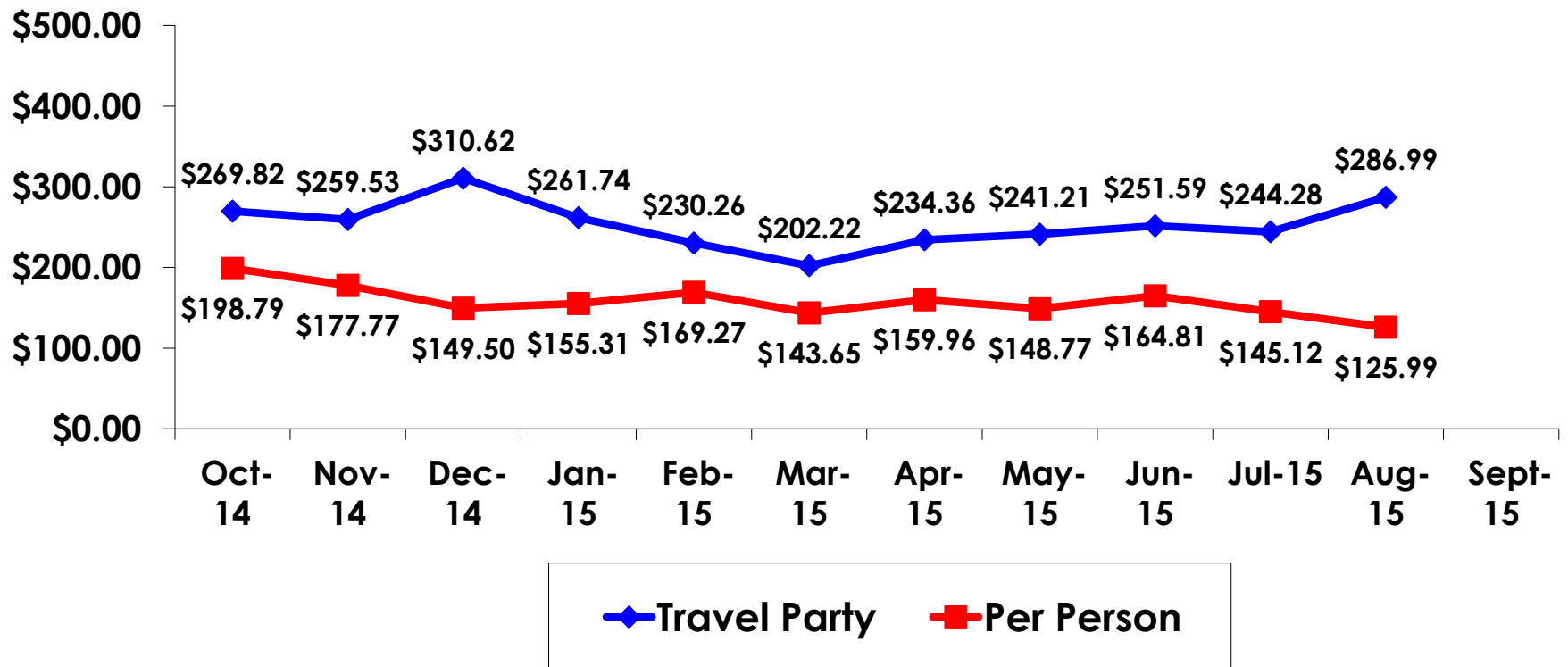
On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$65.61	\$46.10	\$84.26
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$46.53	\$38.17	\$54.52
	Median	\$10	\$0	\$20
F&B RESTRNT	Mean	\$123.65	\$114.60	\$132.30
	Median	\$30	\$1	\$60
OPT TOUR	Mean	\$104.32	\$87.47	\$120.42
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$189.53	\$154.20	\$223.30
	Median	\$30	\$15	\$50
GIFT- OTHER	Mean	\$110.36	\$84.01	\$135.54
	Median	\$50	\$20	\$94
TRANS	Mean	\$18.15	\$8.12	\$27.73
	Median	\$0	\$0	\$0
OTHER	Mean	\$353.97	\$227.39	\$474.93
	Median	\$0	\$0	\$0
TOTAL	Mean	\$996.20	\$727.38	\$1,253.07
	Median	\$700	\$600	\$825

ON-ISLE EXPENDITURES – Per Day

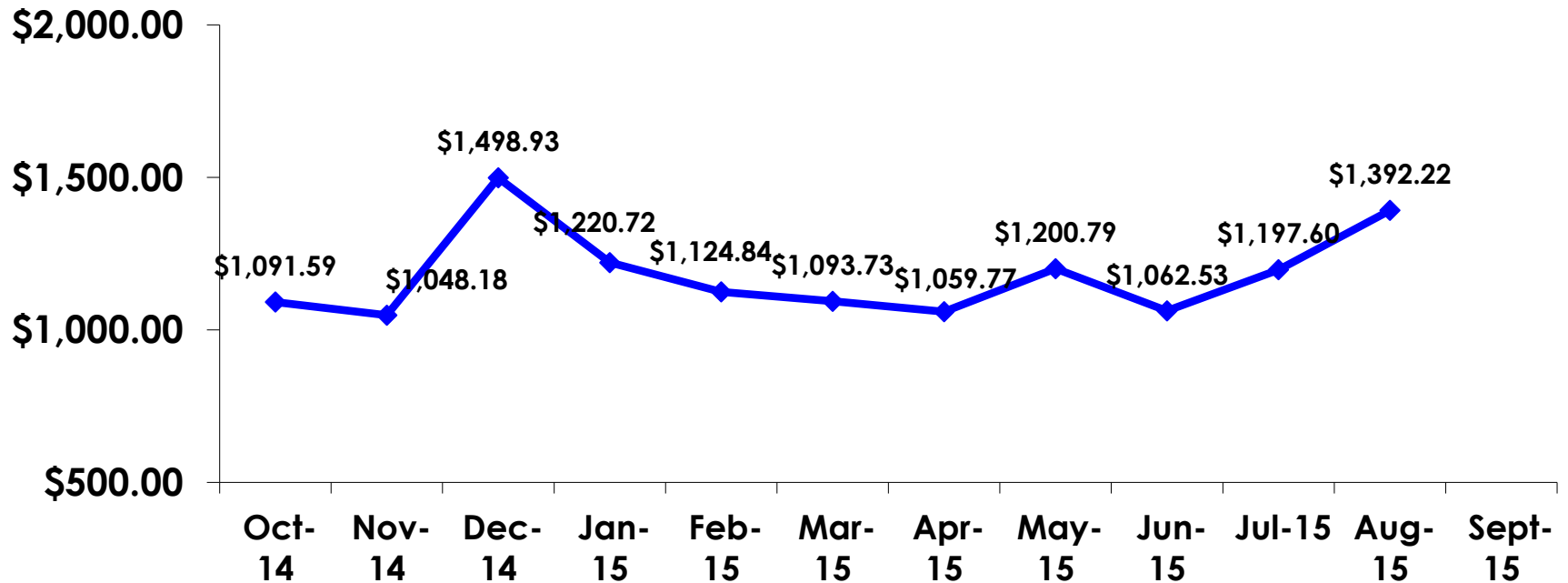
Travel Party YTD = \$253.83 Per Person YTD = \$158.06



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,392.22 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,279 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



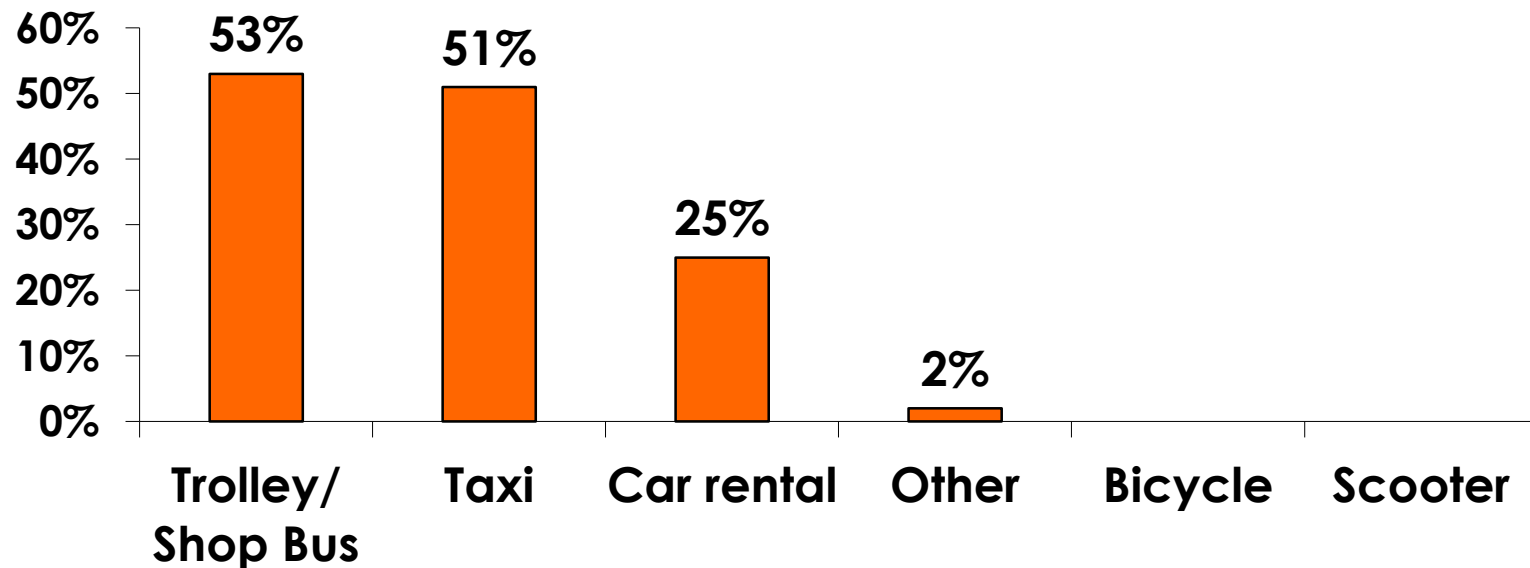
YTD=\$1,181.03

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$65.61
Food & beverage in fast food restaurant/convenience store	\$46.53
Food & beverage at restaurants or drinking establishments outside a hotel	\$123.65
Optional tours and activities	\$104.32
Gifts/ souvenirs for yourself/companions	\$189.53
Gifts/ souvenirs for friends/family at home	\$110.36
Local transportation	\$18.15
Other expenses not covered	\$353.97
Average Total	\$996.20

Local Transportation

n=59



Mean=\$18.15 per travel party

Guam Airport Expenditures

- \$52.97 = 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

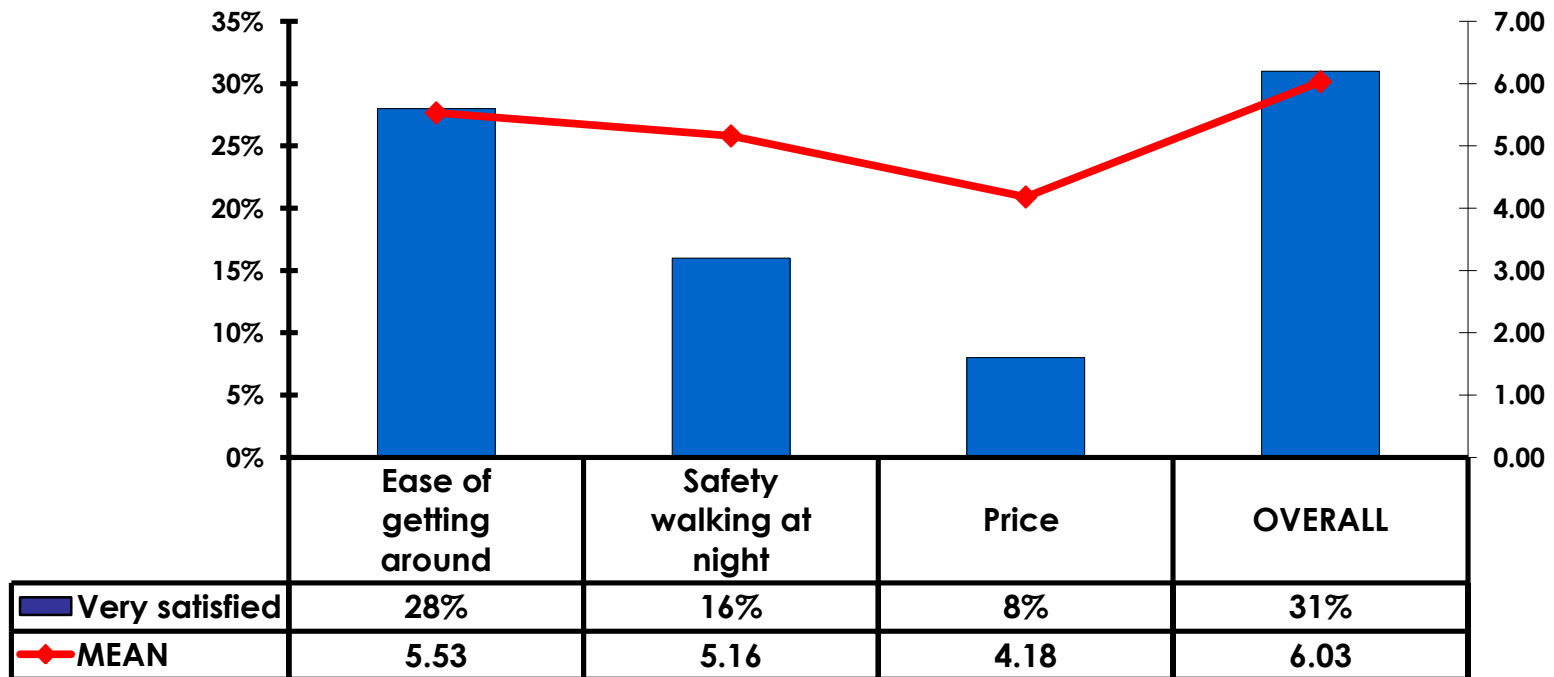
	MEAN \$
Food & Beverages	\$13.20
Gifts/Souvenirs Self	\$23.89
Gifts/Souvenirs Others	\$15.96
Total	\$52.97

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

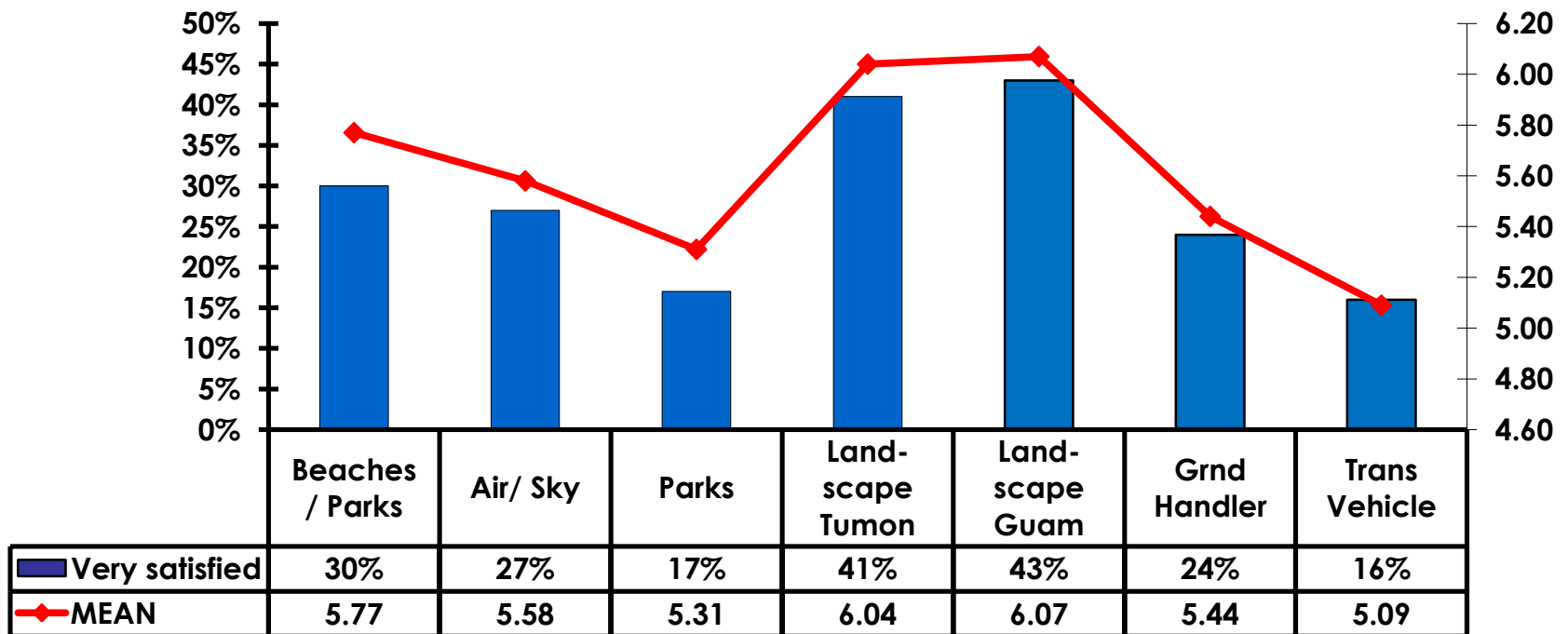
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

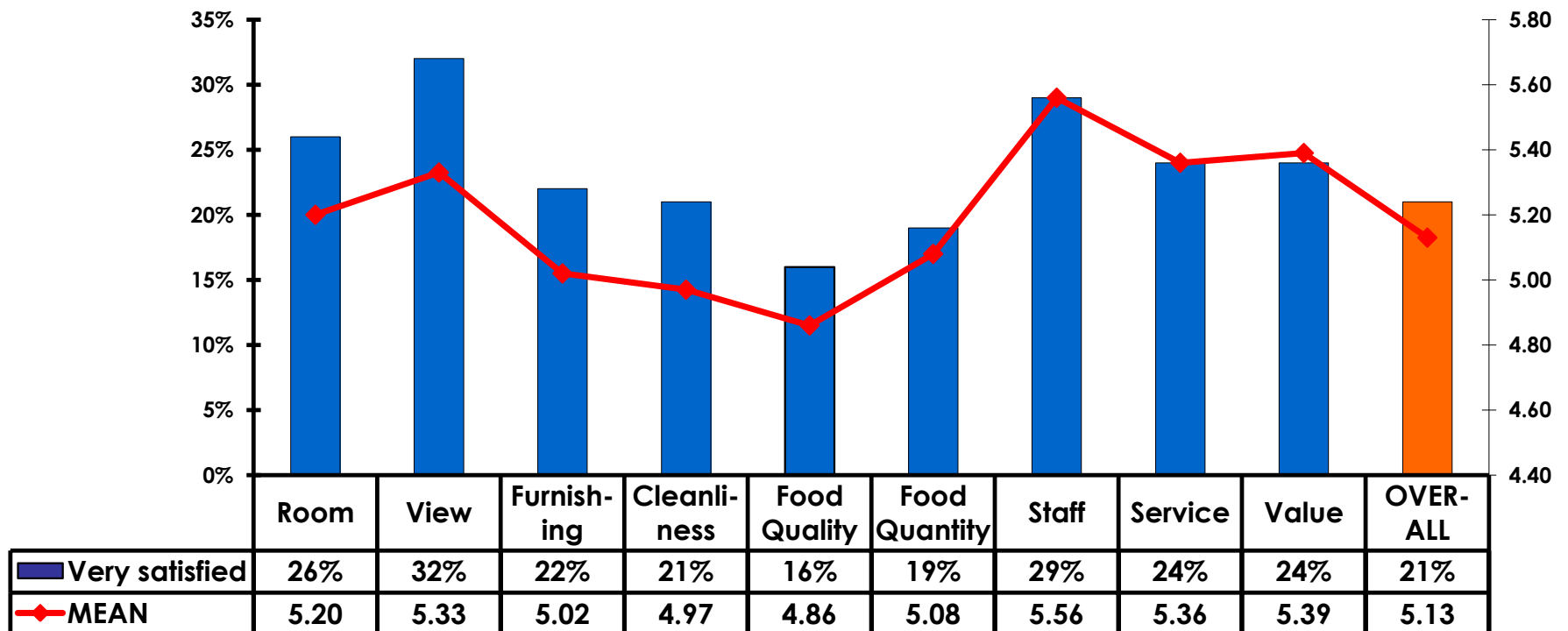
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

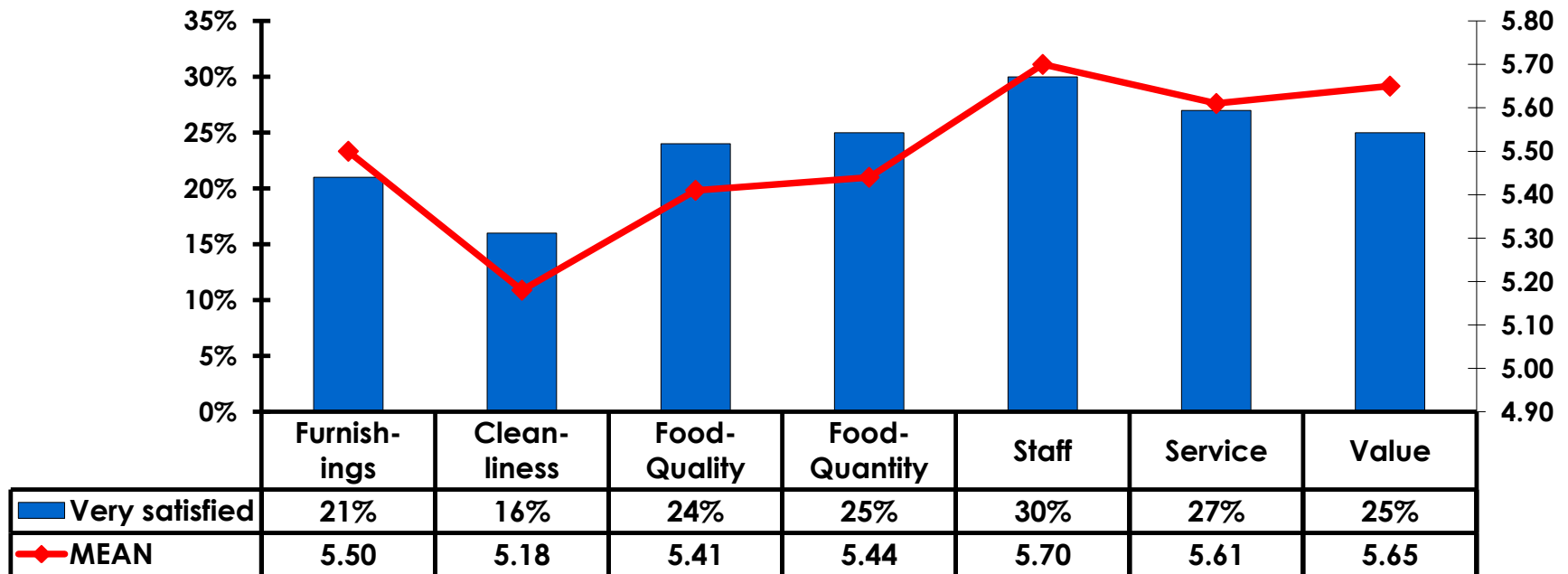
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

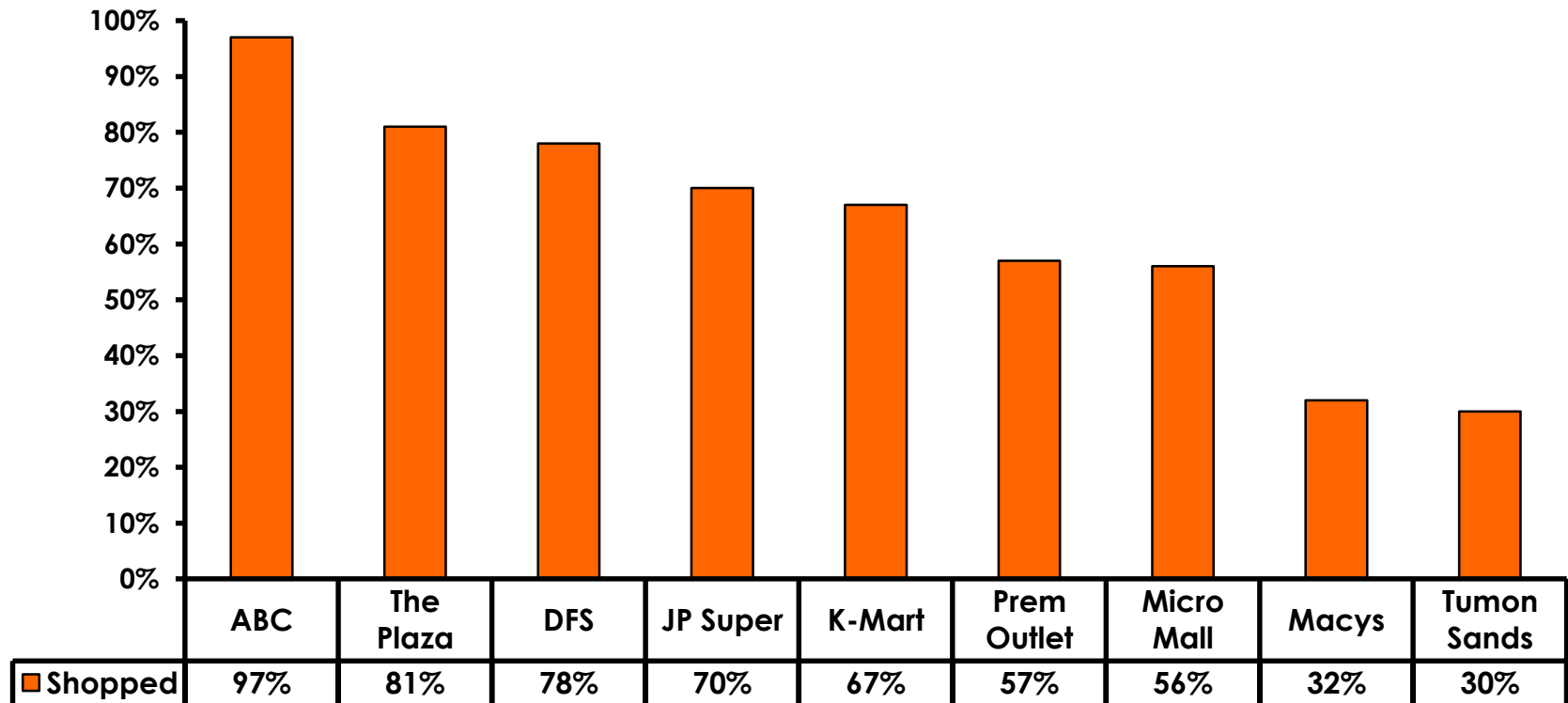
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

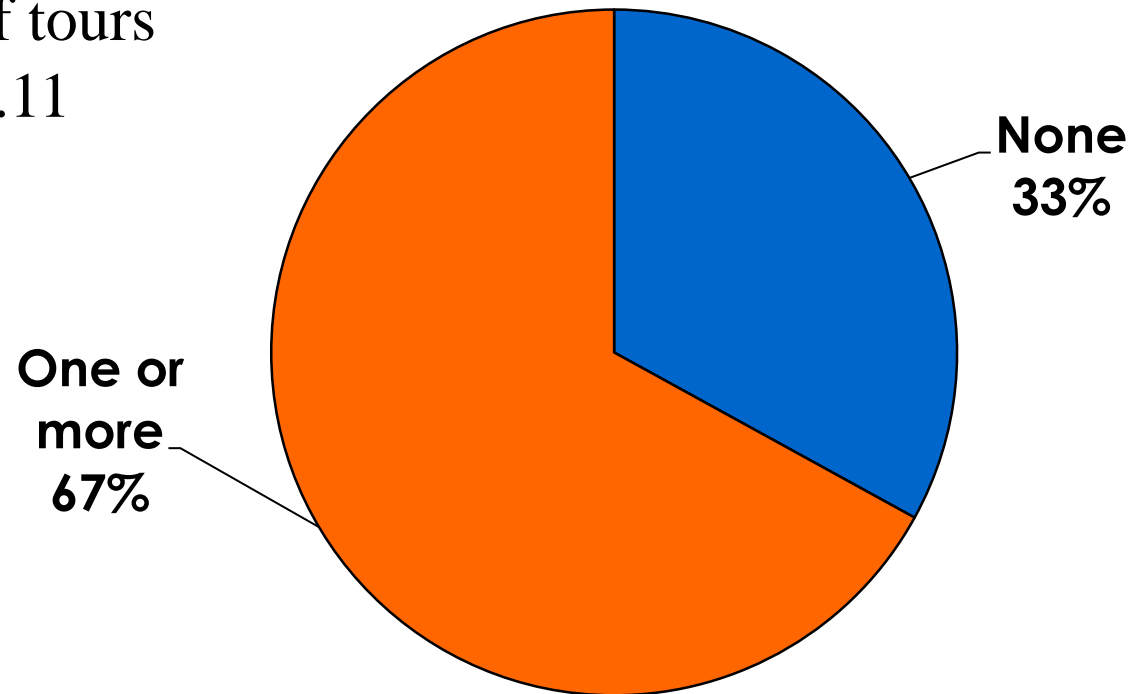
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 53%	Score of 6 to 7 = 52%
Score of 4 to 5 = 41%	Score of 4 to 5 = 40%
Score 1 to 3 = 5%	Score 1 to 3 = 8%
MEAN = 5.40	MEAN = 5.32

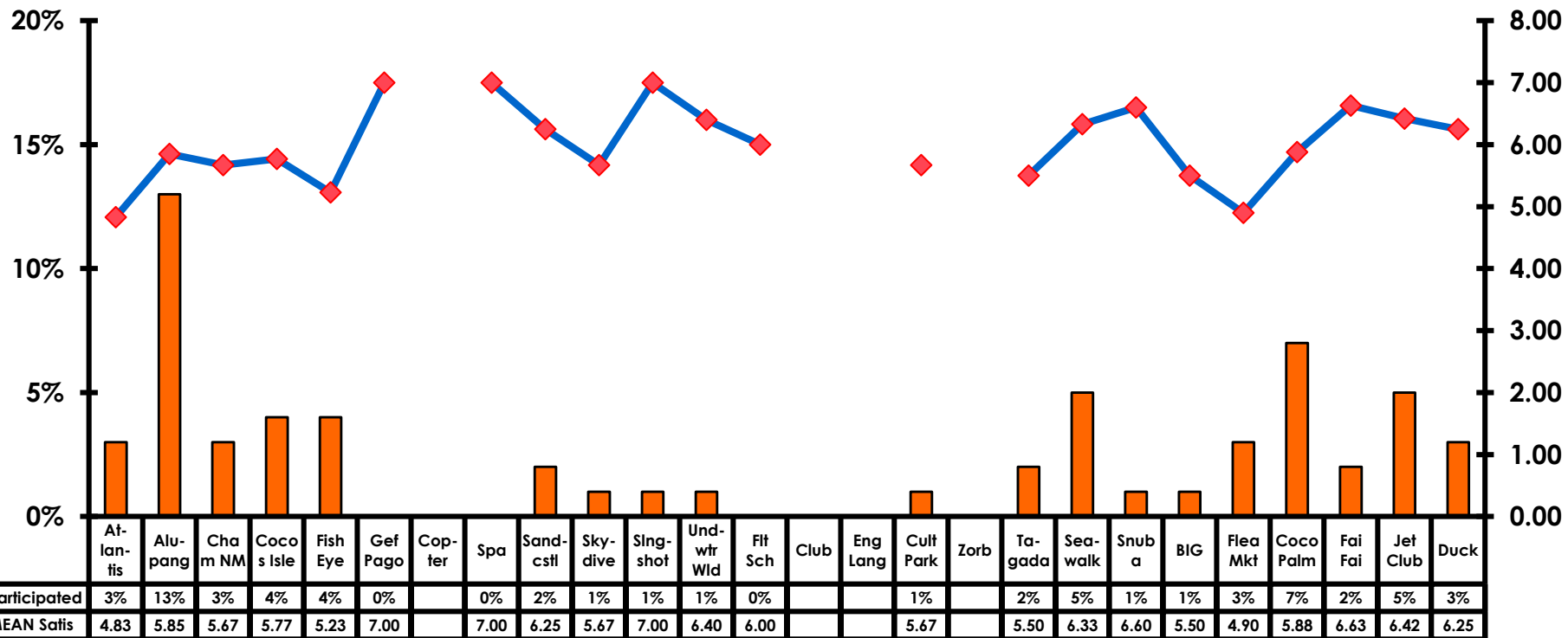
Optional Tour Participation

- Average number of tours participated in is 1.11



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 = 56%	Score of 6 to 7 = 55%
Score of 4 to 5 = 41%	Score of 4 to 5 = 43%
Score 1 to 3 = 3%	Score 1 to 3 = 2%
MEAN = 5.51	MEAN = 5.50

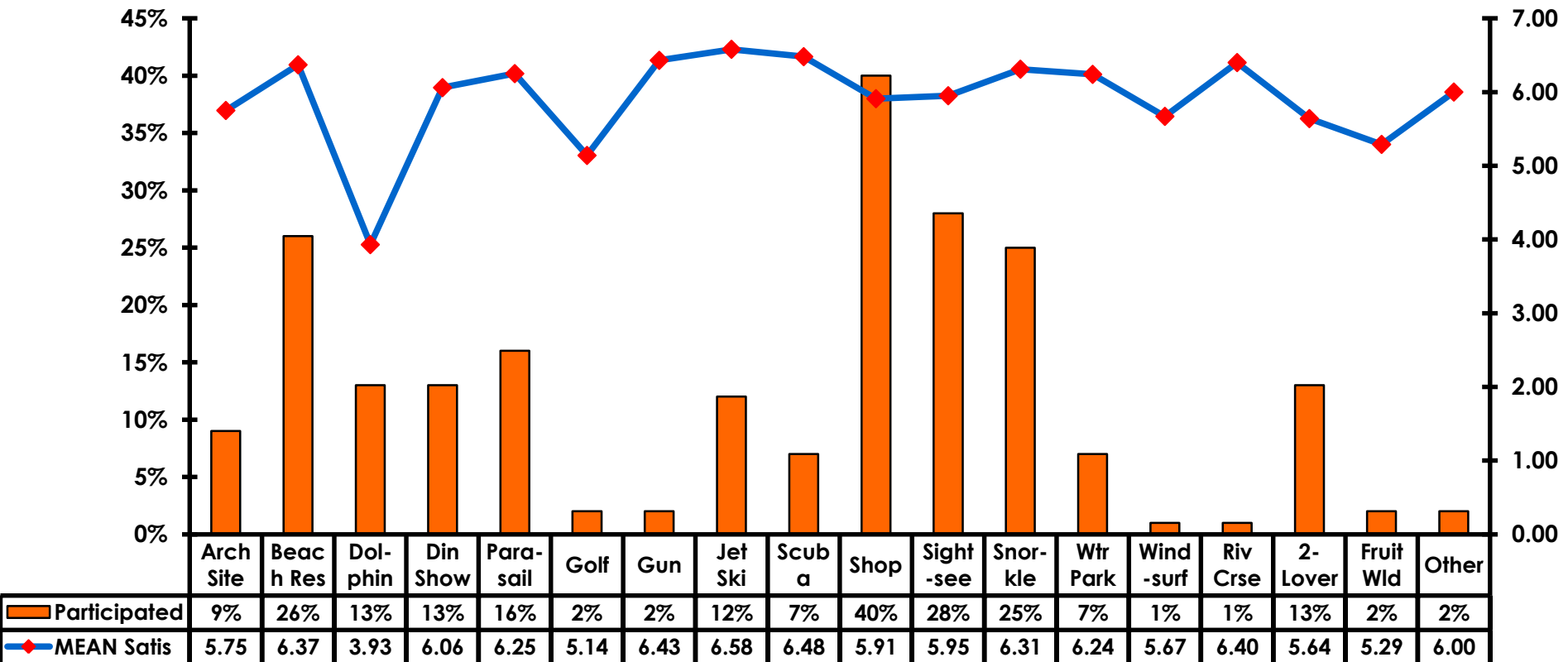
Night Tours Satisfaction

7pt Rating Scale

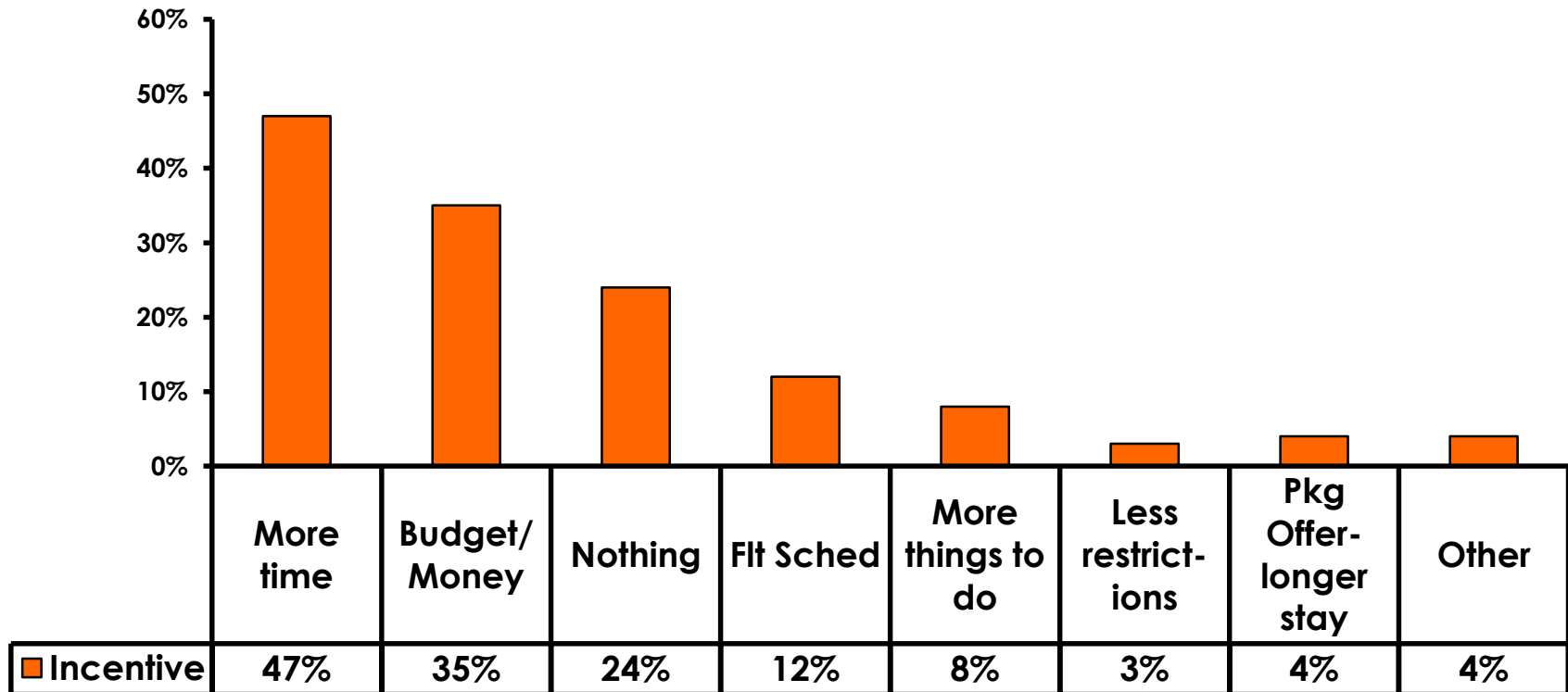
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 26%	Score of 6 to 7 = 28%
Score of 4 to 5 = 72%	Score of 4 to 5 = 70%
Score 1 to 3 = 2%	Score 1 to 3 = 3%
MEAN = 4.72	MEAN = 4.73

Satisfaction with Other Activities



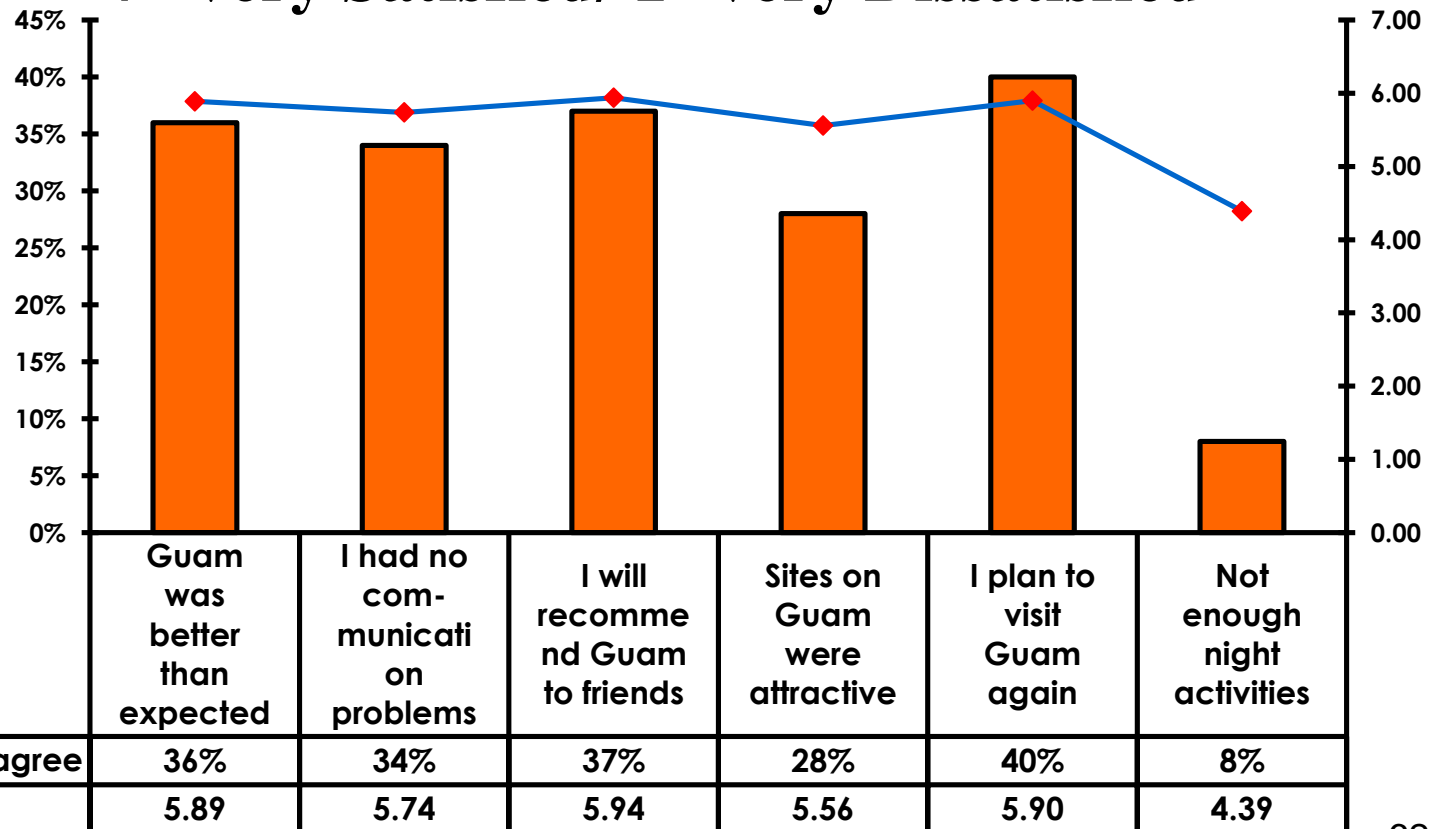
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

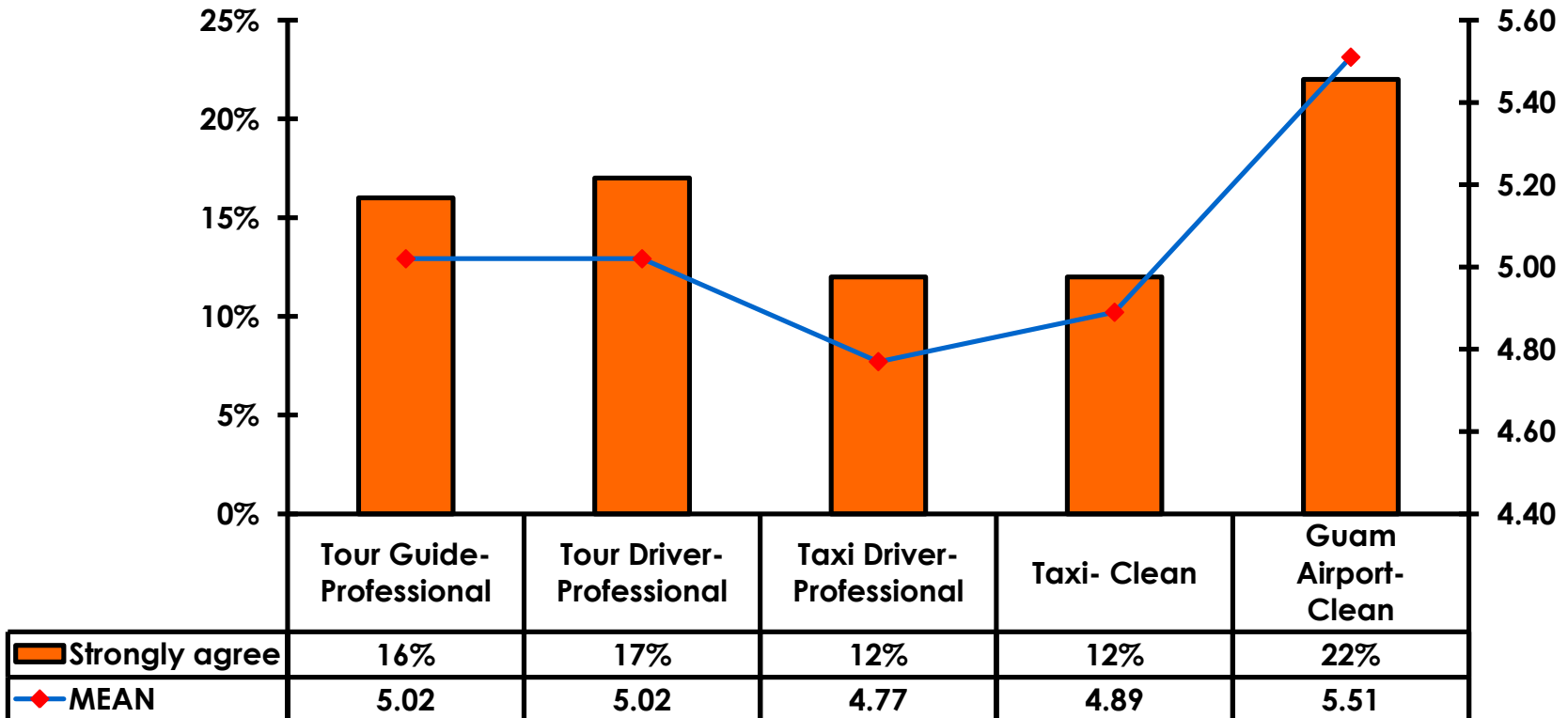
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

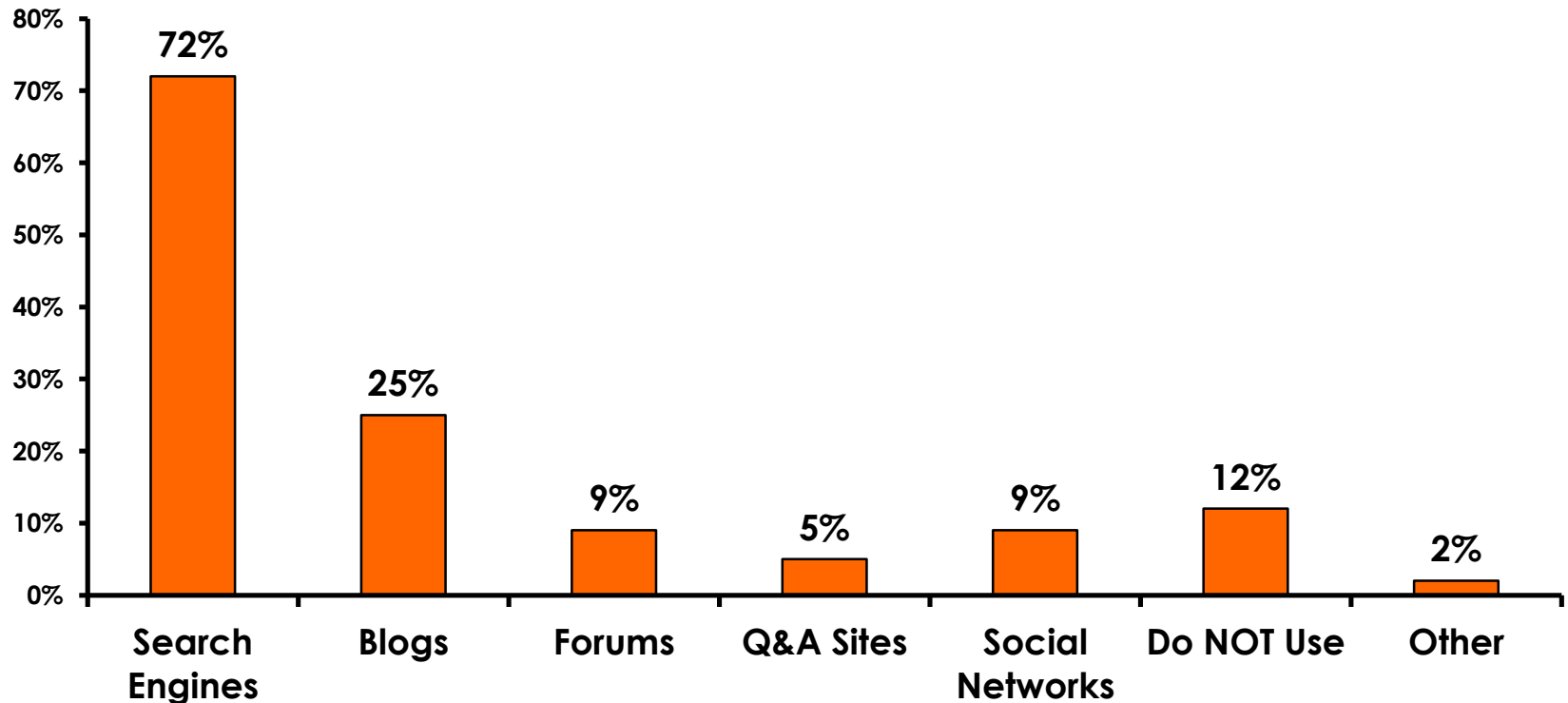
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



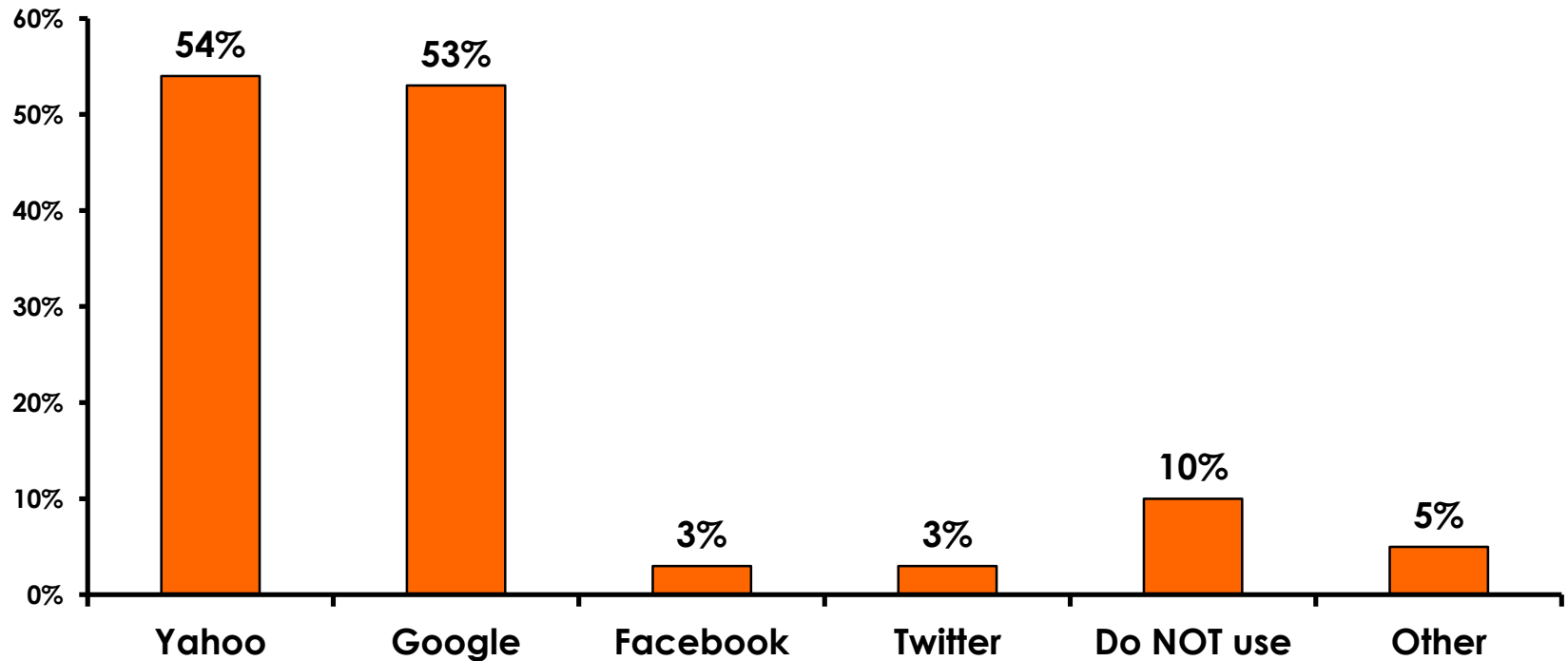
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

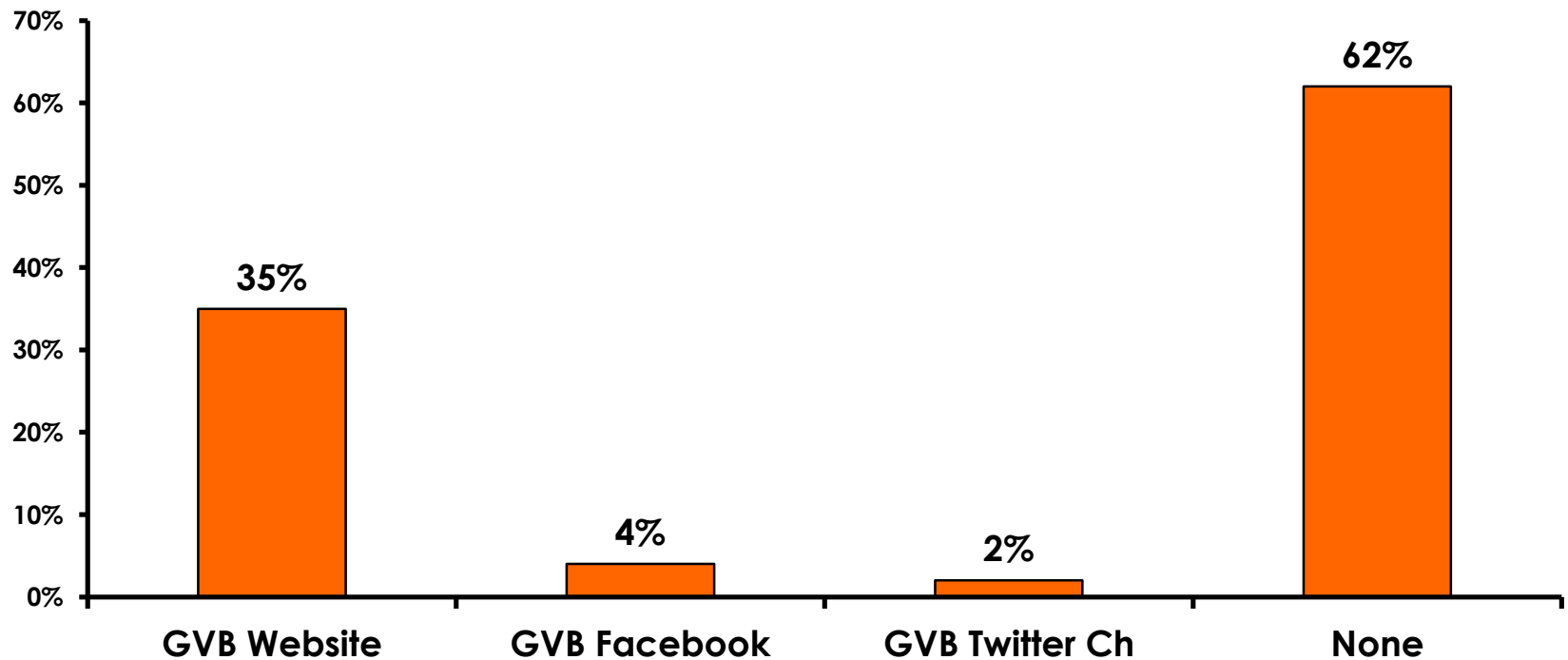


Internet- Things To Do

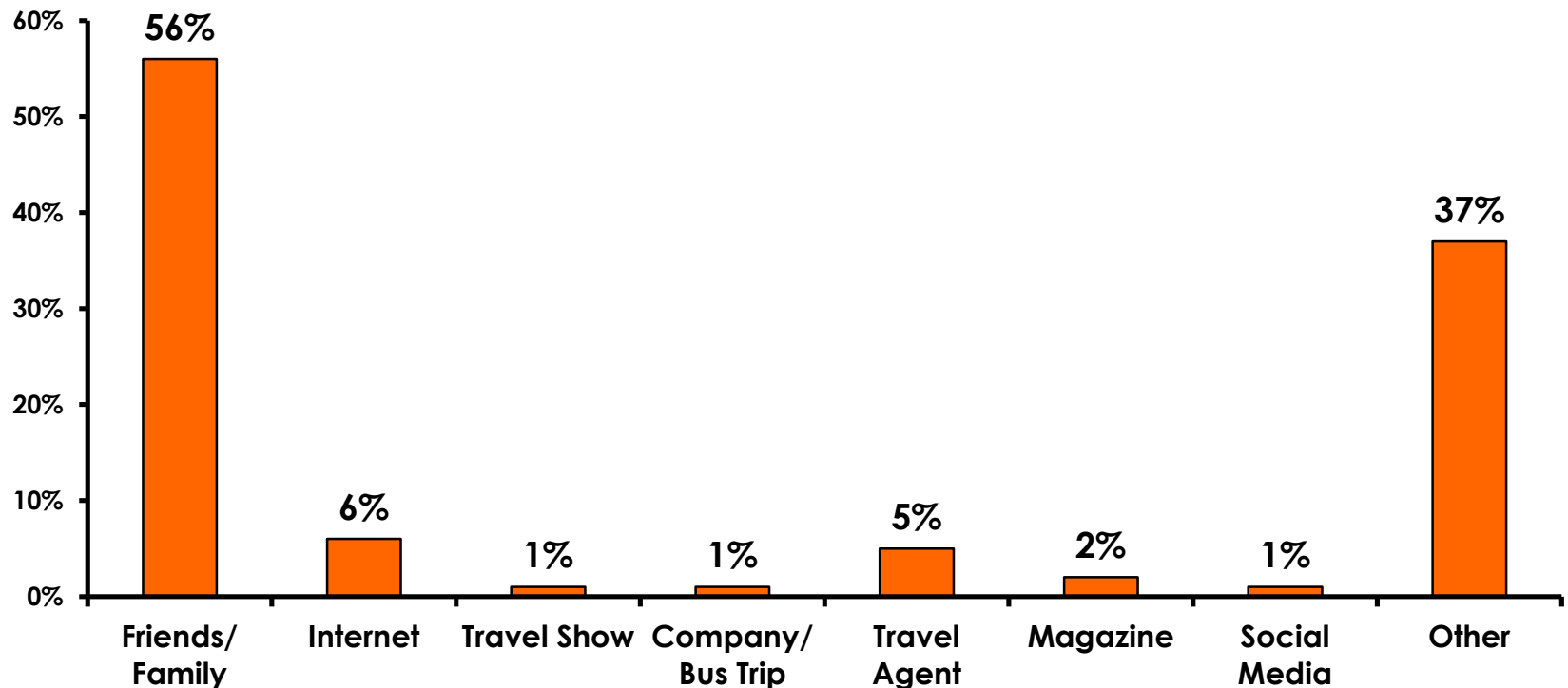
Sources of Info



Internet- GVB Sources

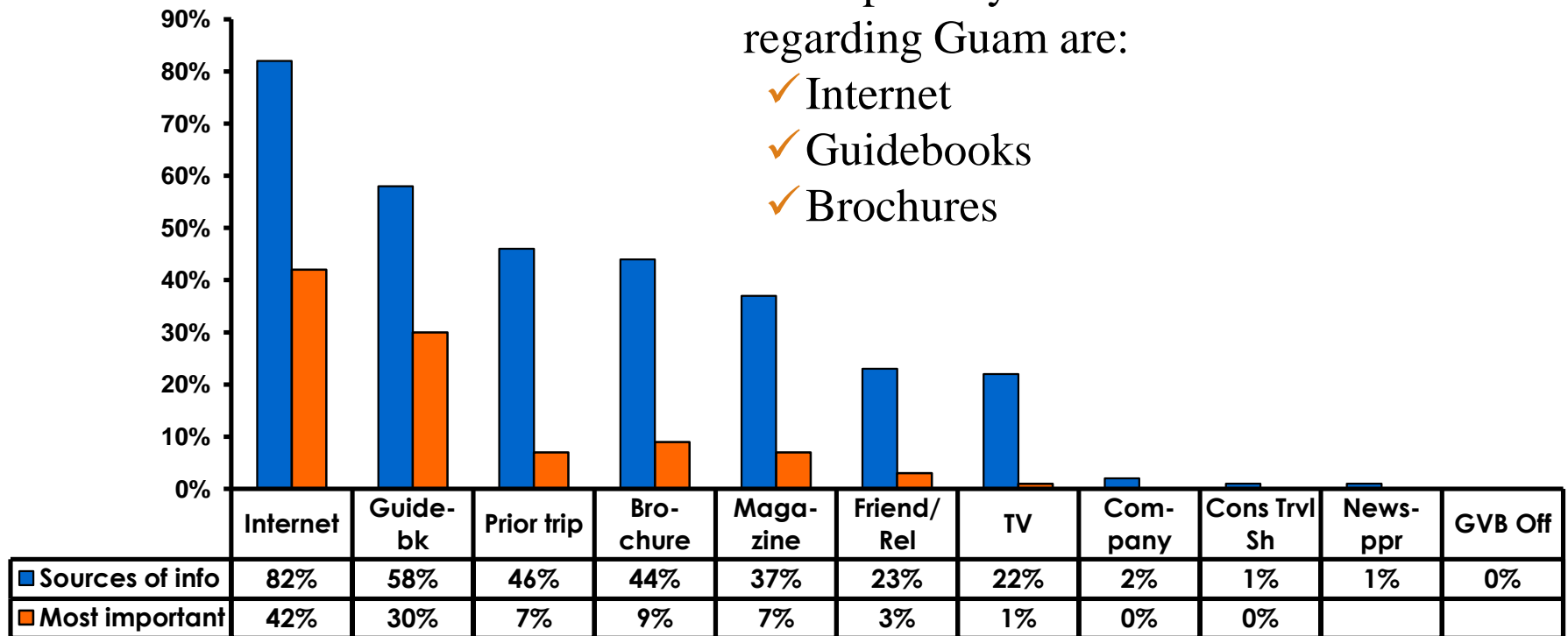


Travel Motivation- Info Sources



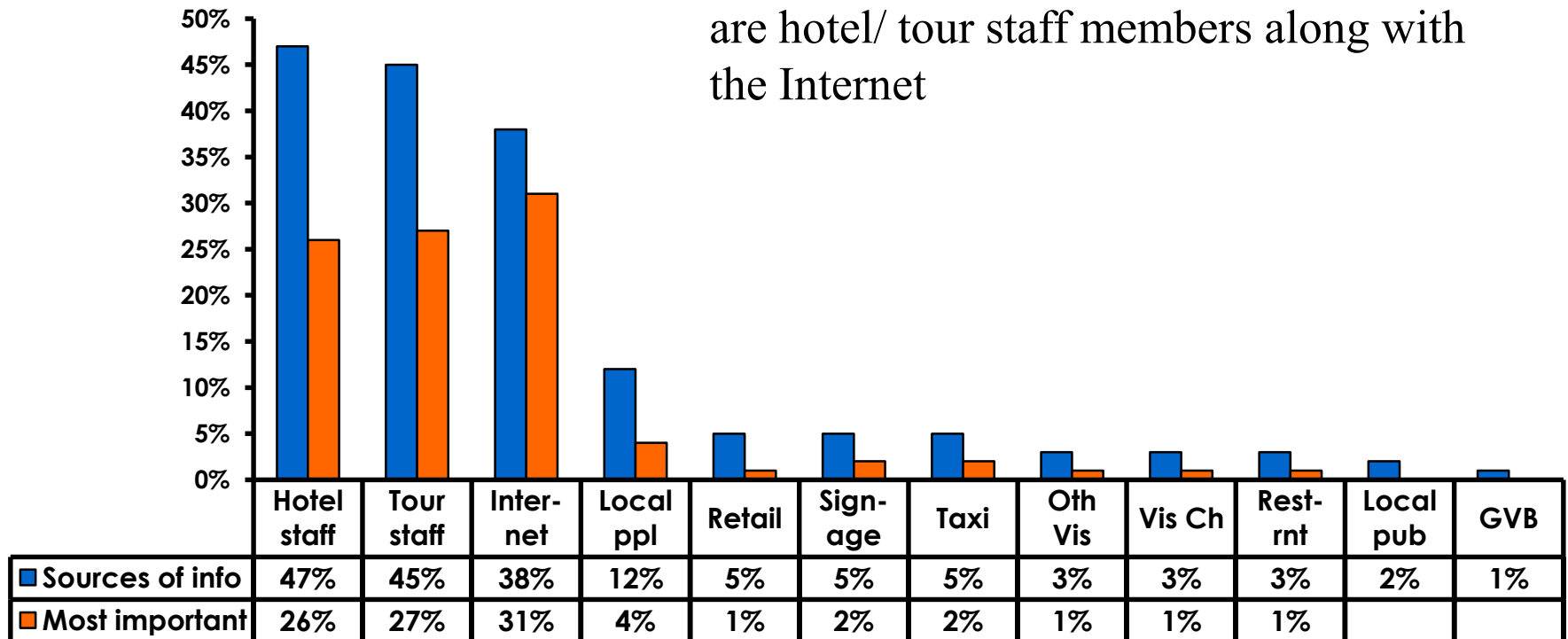
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

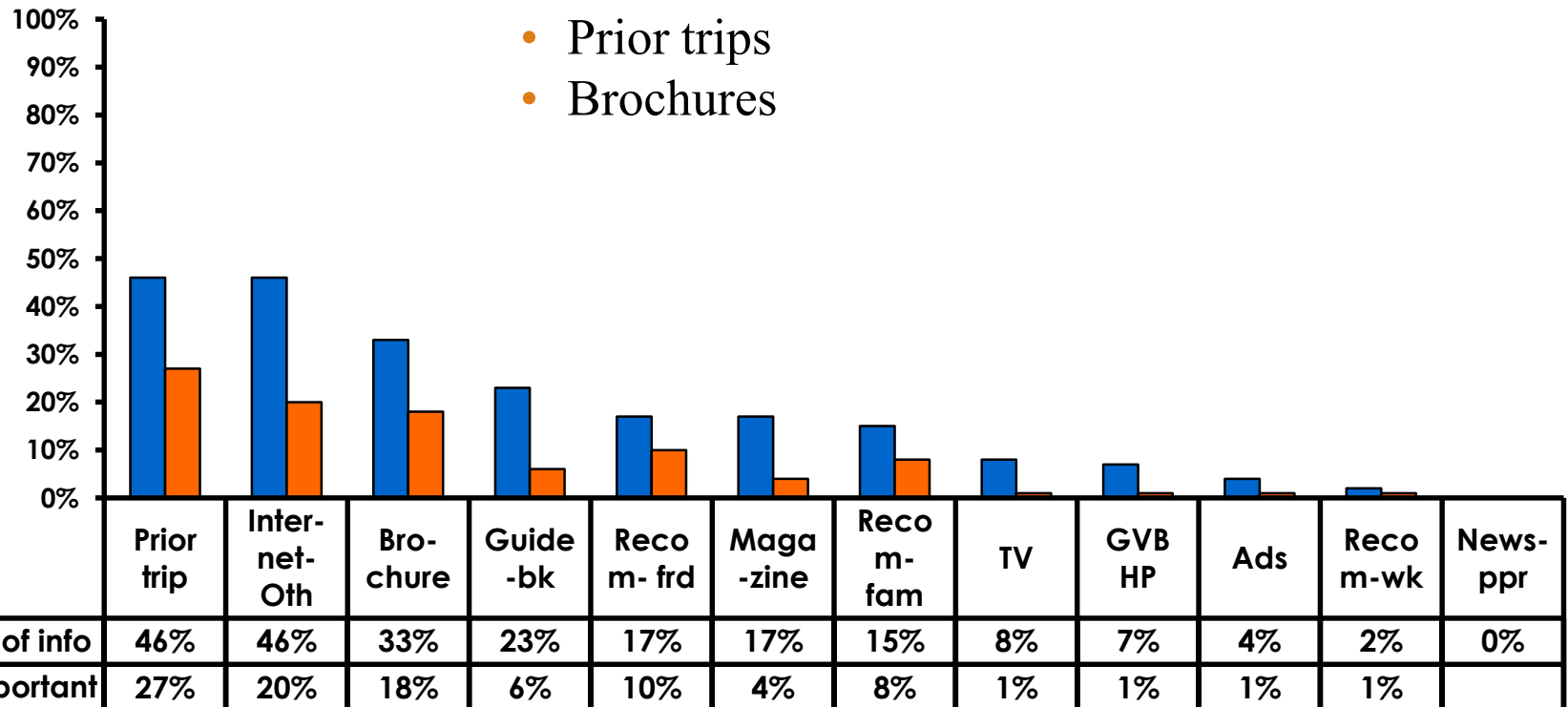
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

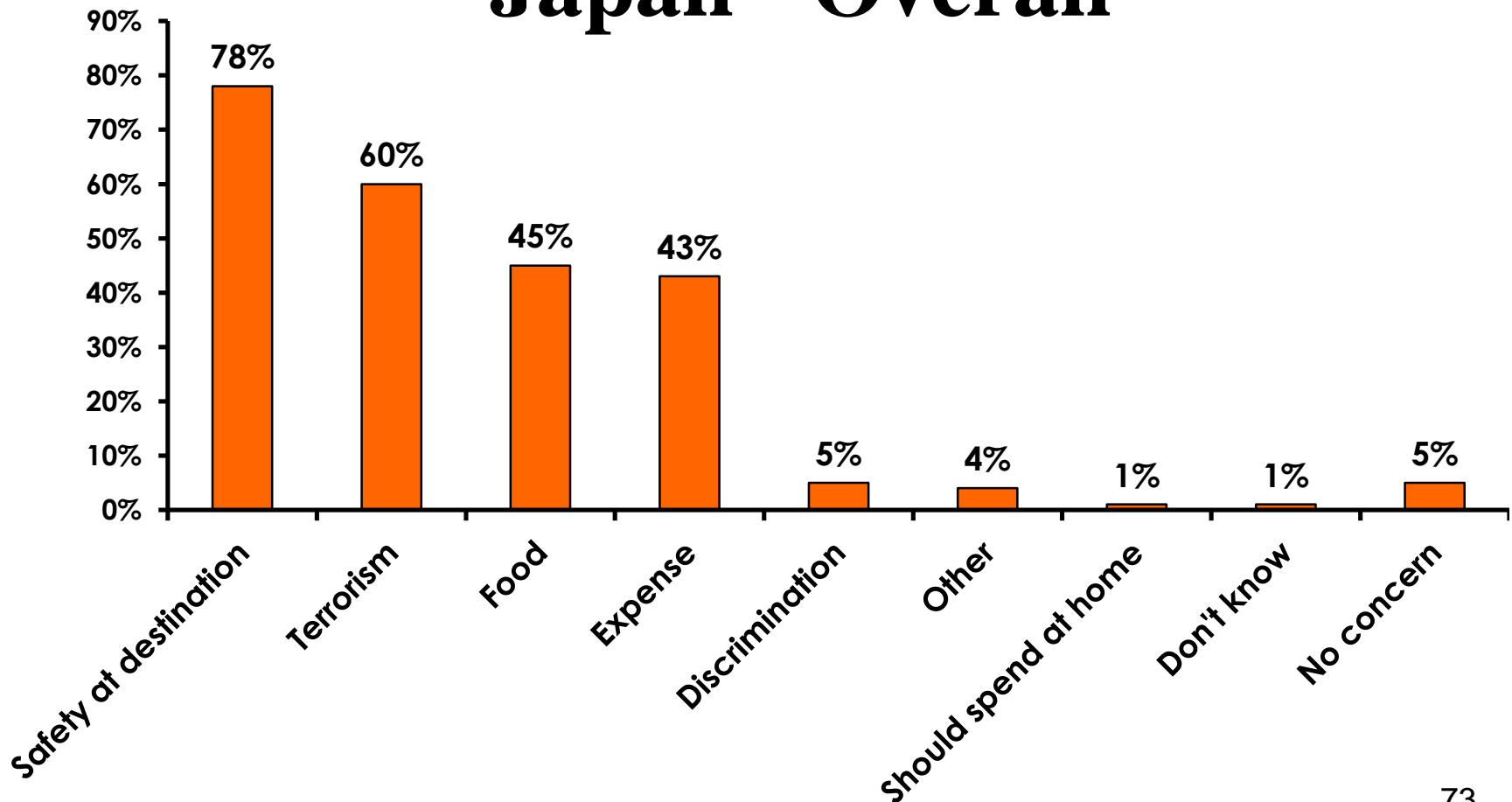
The primary motivational sources of information were.

- Internet sites
- Prior trips
- Brochures



SECTION 6 **OTHER ISSUES**

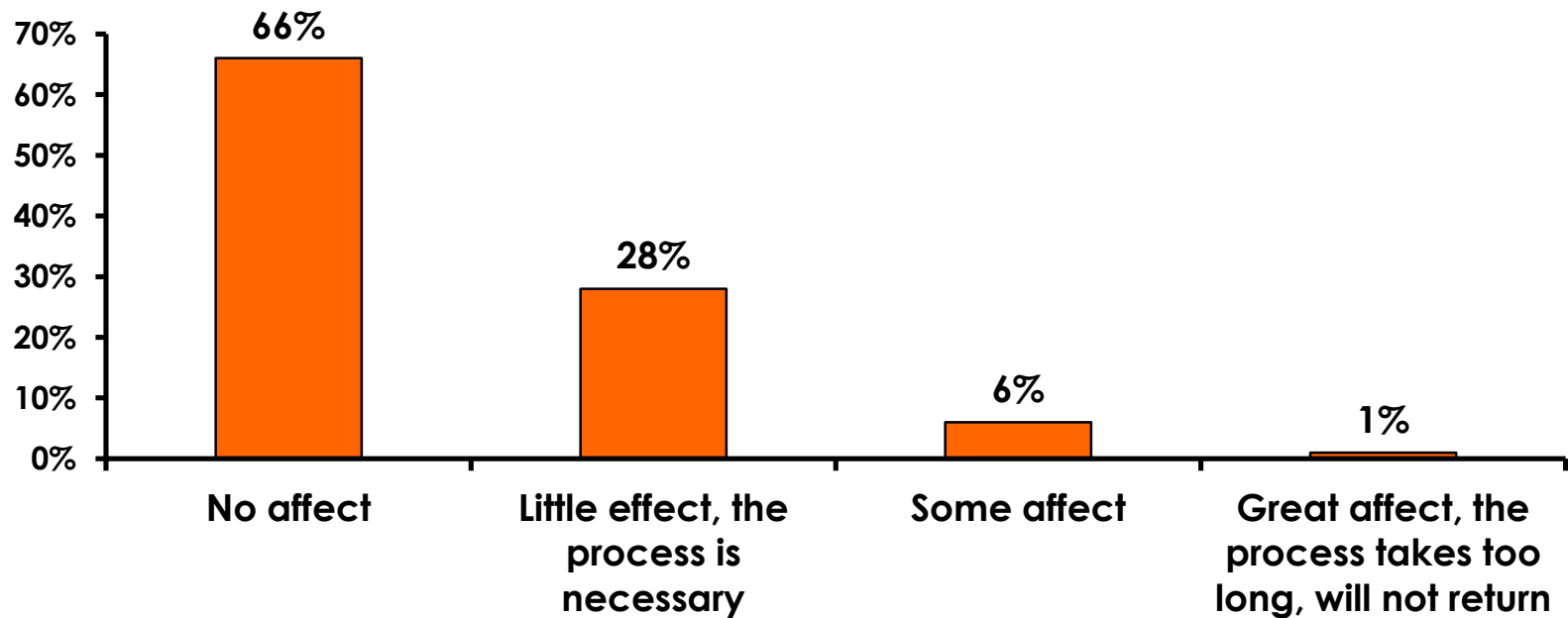
Concerns about travel outside of Japan - Overall



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%	74%	81%	77%	81%	79%	75%	75%	80%	71%	82%	82%	67%	
	Terrorism	60%	47%	60%	66%	59%	57%	43%	66%	64%	75%	62%	59%	100%	
	Food	45%	48%	47%	43%	50%	36%	54%	41%	45%	58%	38%	46%	100%	
	Expense	43%	47%	49%	39%	44%	36%	32%	47%	50%	50%	45%	36%	67%	
	Discrimination against Japanese	5%	8%	5%	5%	3%		4%	9%	5%	10%	4%	6%		
	No concerns	5%	6%	3%	7%		7%	7%	3%	5%	6%	4%	5%		
	Other	4%	5%	4%	4%	3%		4%	6%	5%	4%	5%	4%		
	Don't know	1%	2%		1%	3%							1%		
	Should spend at home	1%		1%	1%				3%			1%			
	Total	Count	349	62	75	178	32	14	28	32	44	48	73	83	3

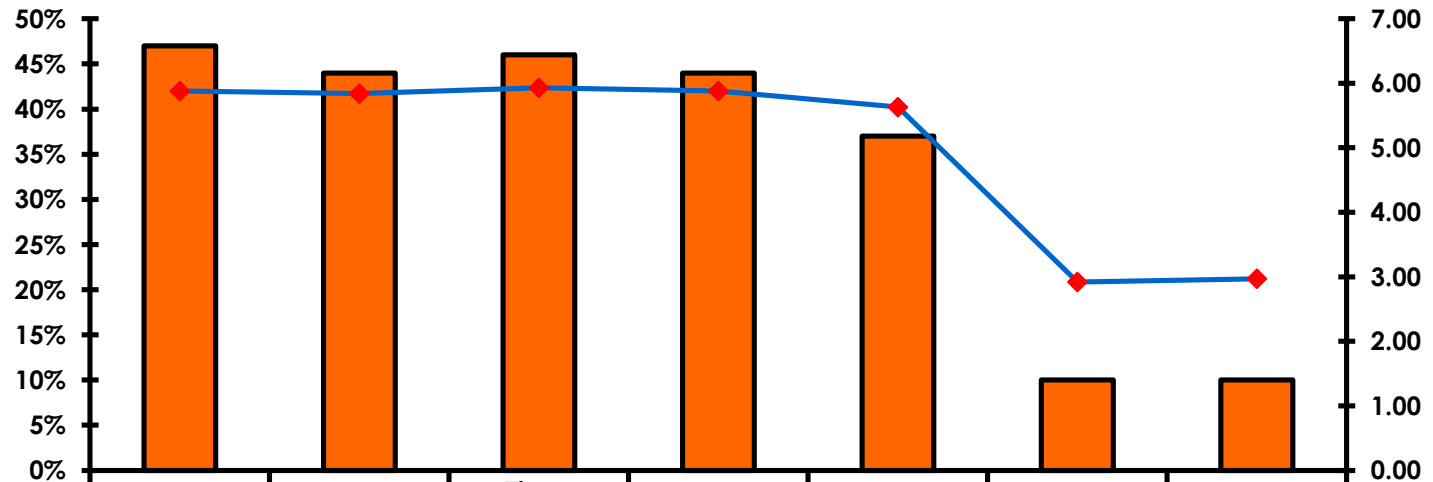
Security Screening/ Immigration Process at Guam International Airport





Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



 Strongly agree	47%	44%	46%	44%	37%	10%	10%
 MEAN	5.88	5.84	5.93	5.88	5.63	2.92	2.97