



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015

DECEMBER 2014



Prepared by: QMark Research

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Background & Methodology

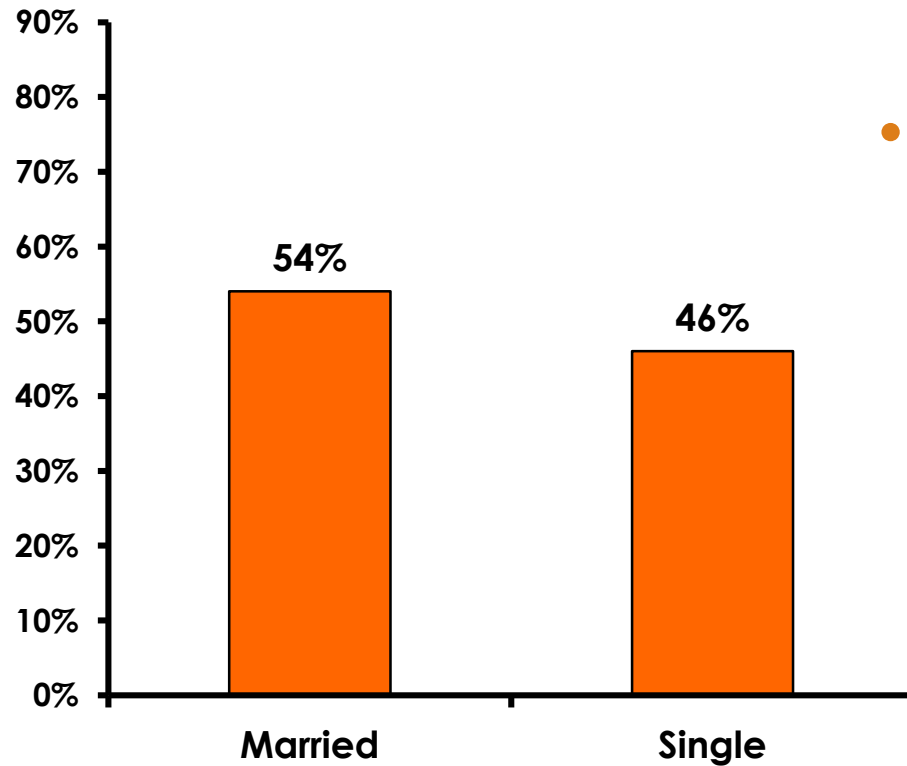
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing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

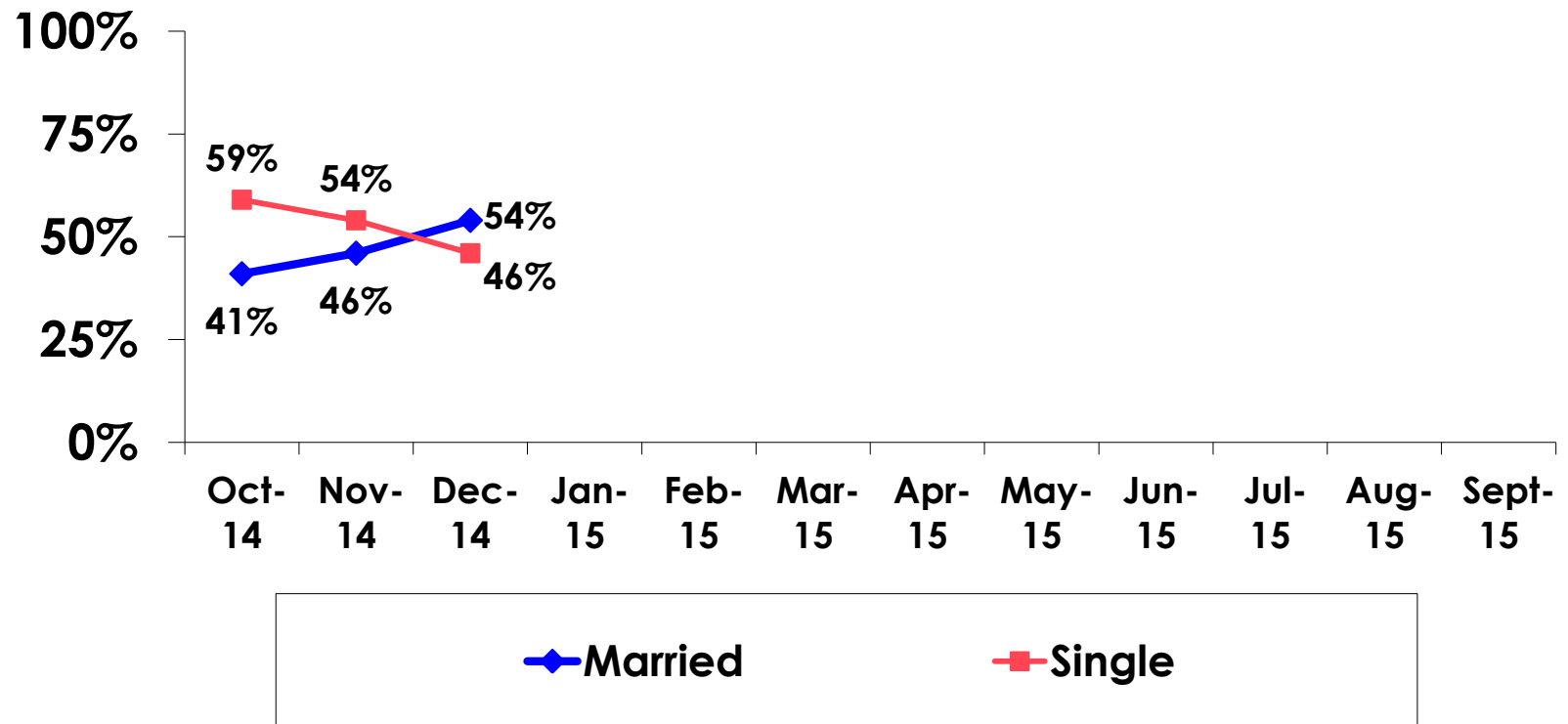
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

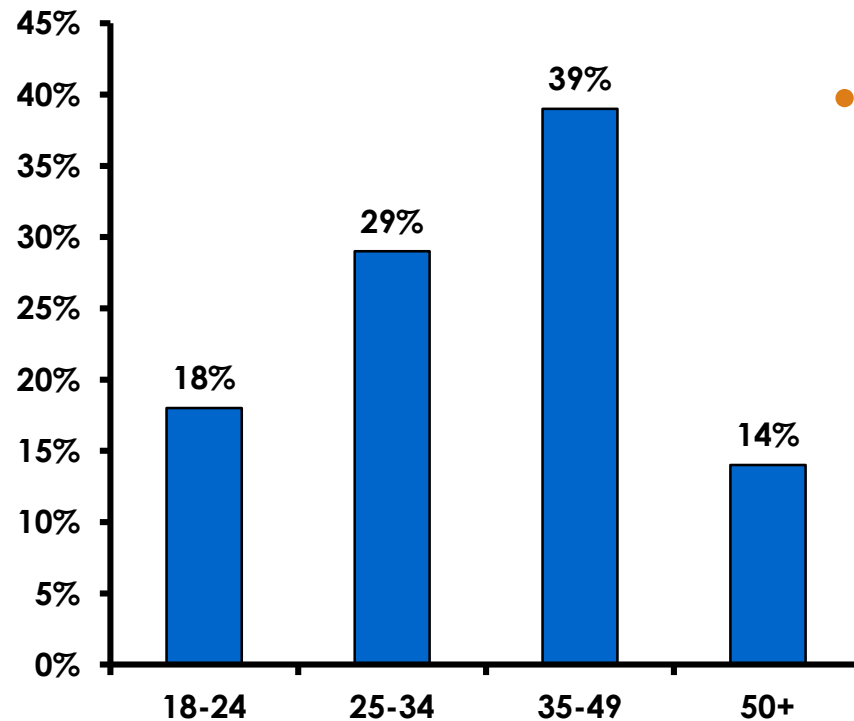


- 63% of repeat visitors are married.

MARITAL STATUS

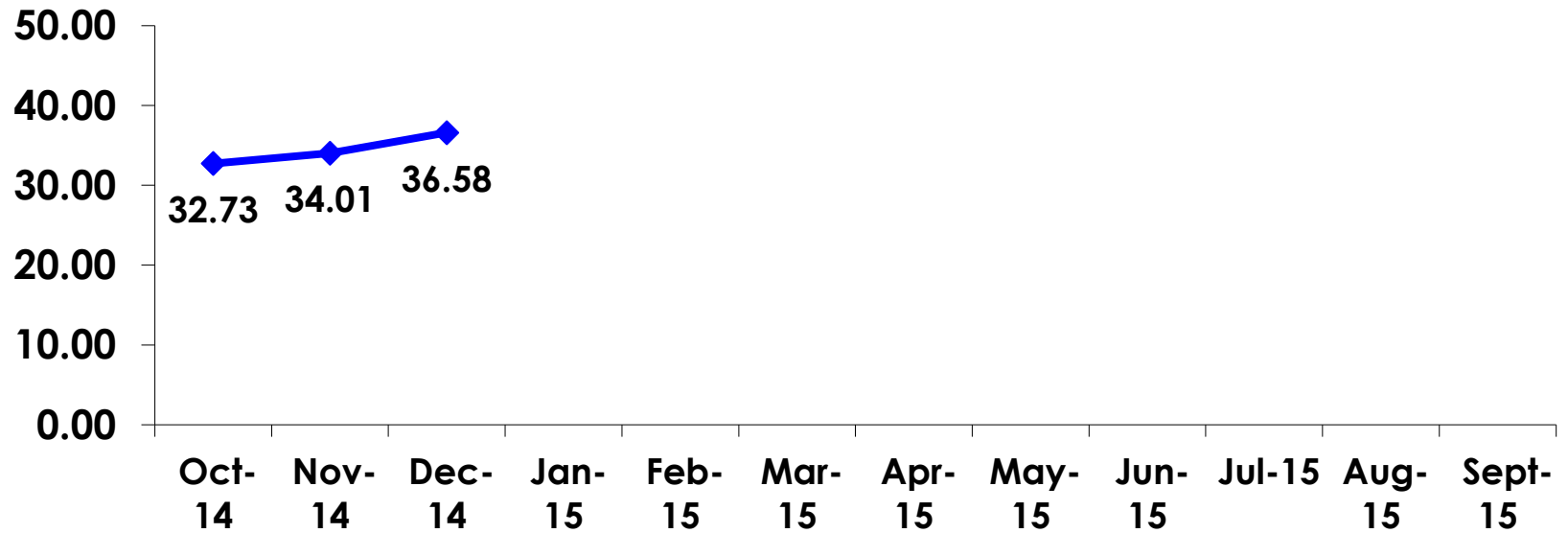


Age - Overall

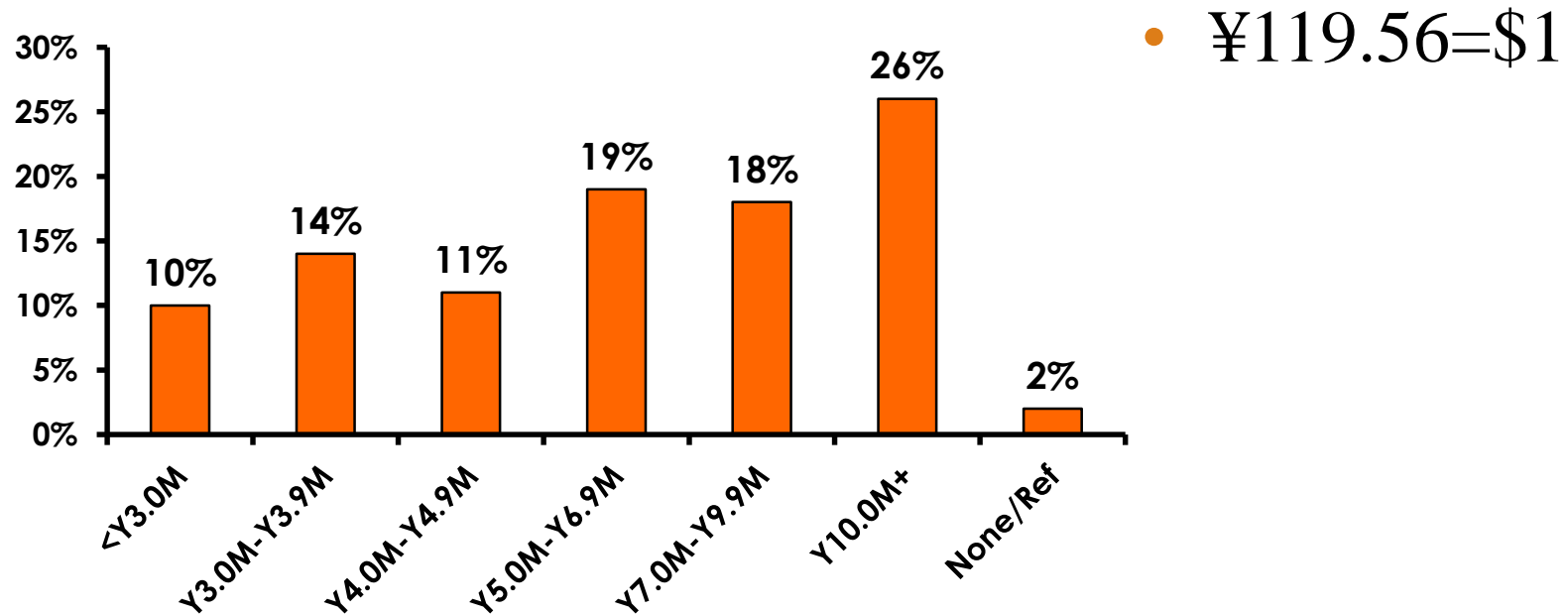


- The average age of the respondents is 36.58 years of age.

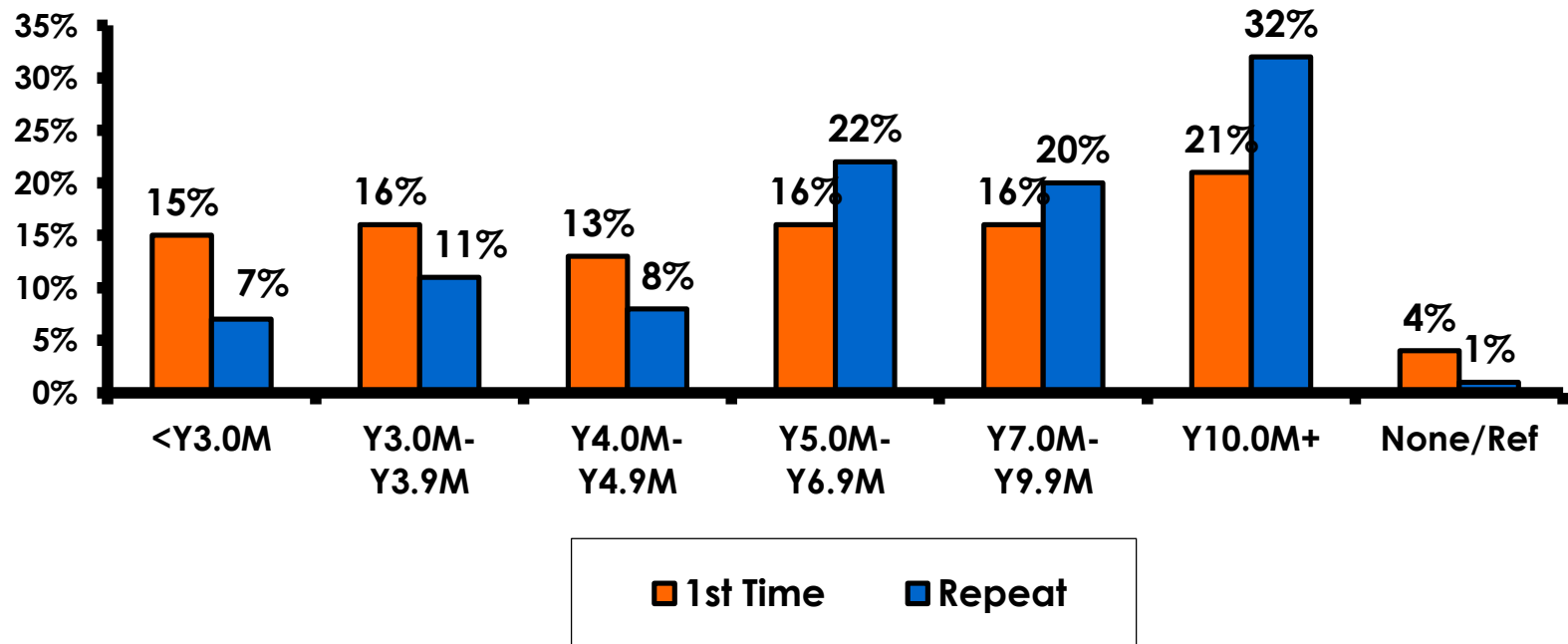
AVERAGE - AGE



Personal Income



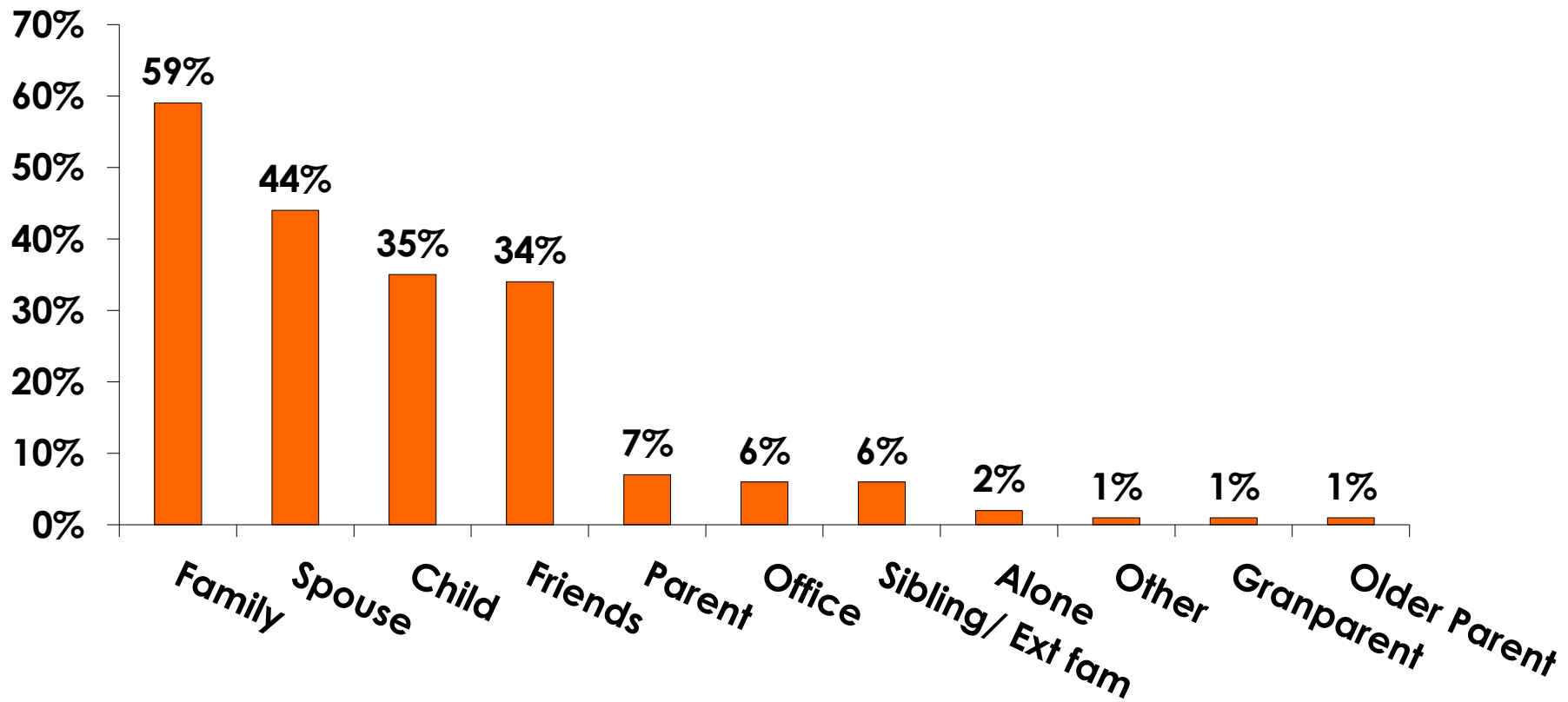
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	12	3	9	7	2	2	1
		Column N %	4%	2%	6%	16%	2%	2%	2%
	Y2.0M-Y3.0M	Count	19	4	15	4	11	3	1
		Column N %	6%	3%	11%	9%	13%	3%	2%
	Y3.0M-Y4.0M	Count	40	17	23	7	25	8	
		Column N %	14%	11%	16%	16%	28%	7%	
	Y4.0M-Y5.0M	Count	31	16	15	5	12	11	3
		Column N %	11%	11%	11%	12%	14%	9%	7%
	Y5.0M-Y7.0M	Count	56	32	24	7	15	24	10
		Column N %	19%	21%	17%	16%	17%	20%	23%
	Y7.0M-Y10.0M	Count	52	37	15	4	10	30	8
		Column N %	18%	24%	11%	9%	11%	25%	19%
	Y10.0M+	Count	77	41	36	5	13	39	20
		Column N %	26%	27%	26%	12%	15%	33%	47%
	No Income	Count	6	2	4	4		2	
		Column N %	2%	1%	3%	9%		2%	
	Total	Count	293	152	141	43	88	119	43

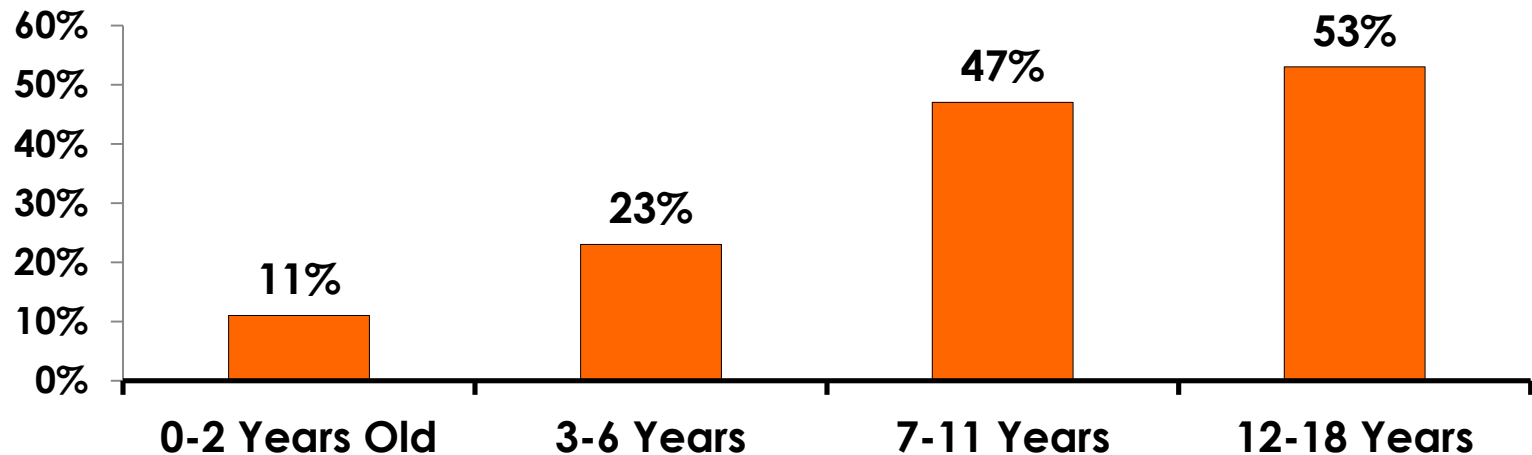
Travel Companions



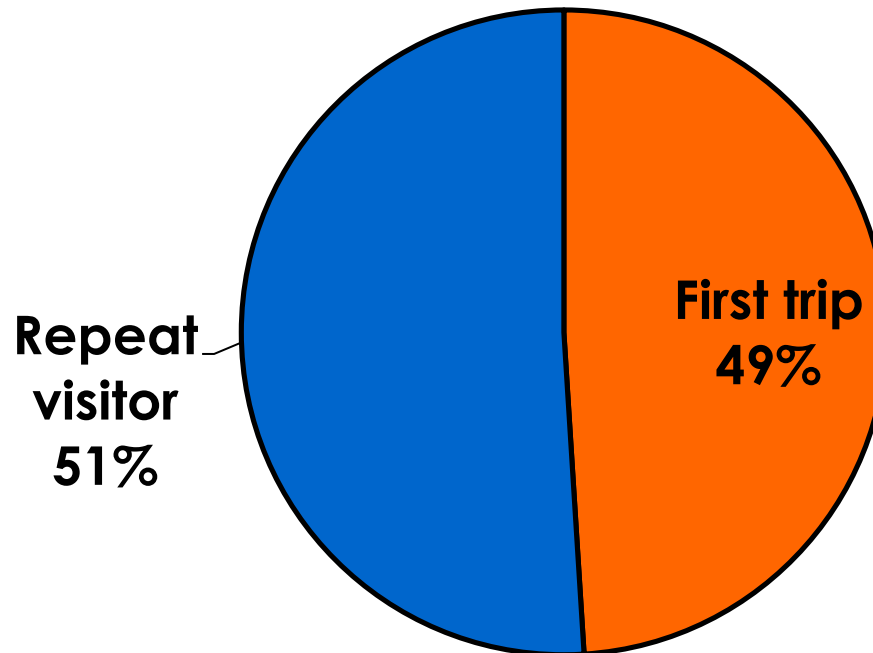
Number of Children Travel Party

N=121 total respondents traveling with children.

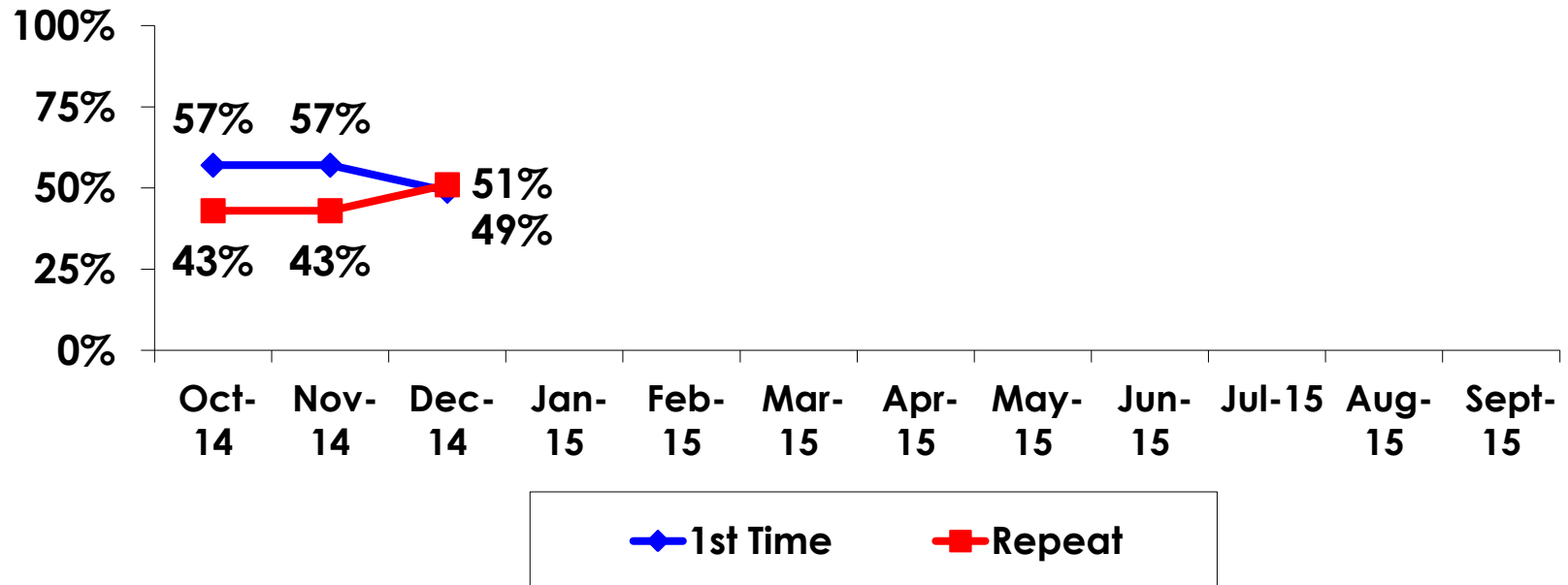
(Of those N=121 respondents, there is a total of 211 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



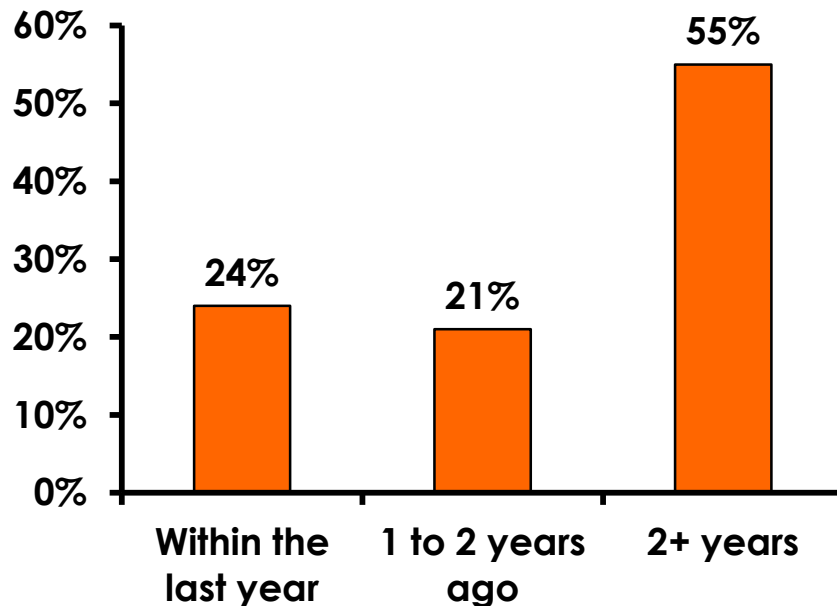
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	173	78	95	
		Column N %	49%	45%	53%	
	Female	Count	178	95	83	
		Column N %	51%	55%	47%	
	Total	Count	351	173	178	
AGE	18-24	Count	62	43	19	
		Column N %	18%	25%	11%	
	25-34	Count	100	62	38	
		Column N %	29%	36%	21%	
	35-49	Count	138	49	89	
		Column N %	39%	28%	50%	
	50+	Count	50	18	32	
		Column N %	14%	10%	18%	
		Total	Count	350	172	178

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

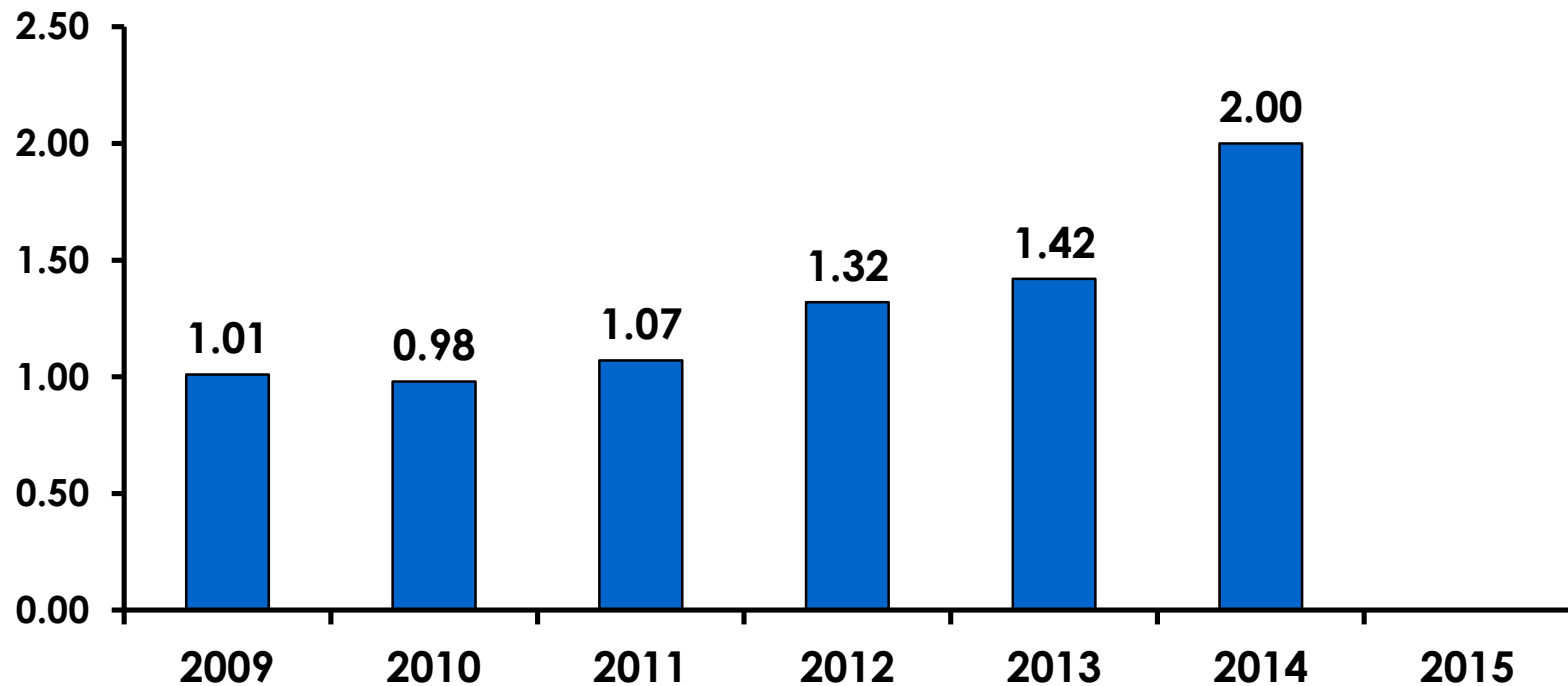
Repeat Visitors Last Trip

n = 168



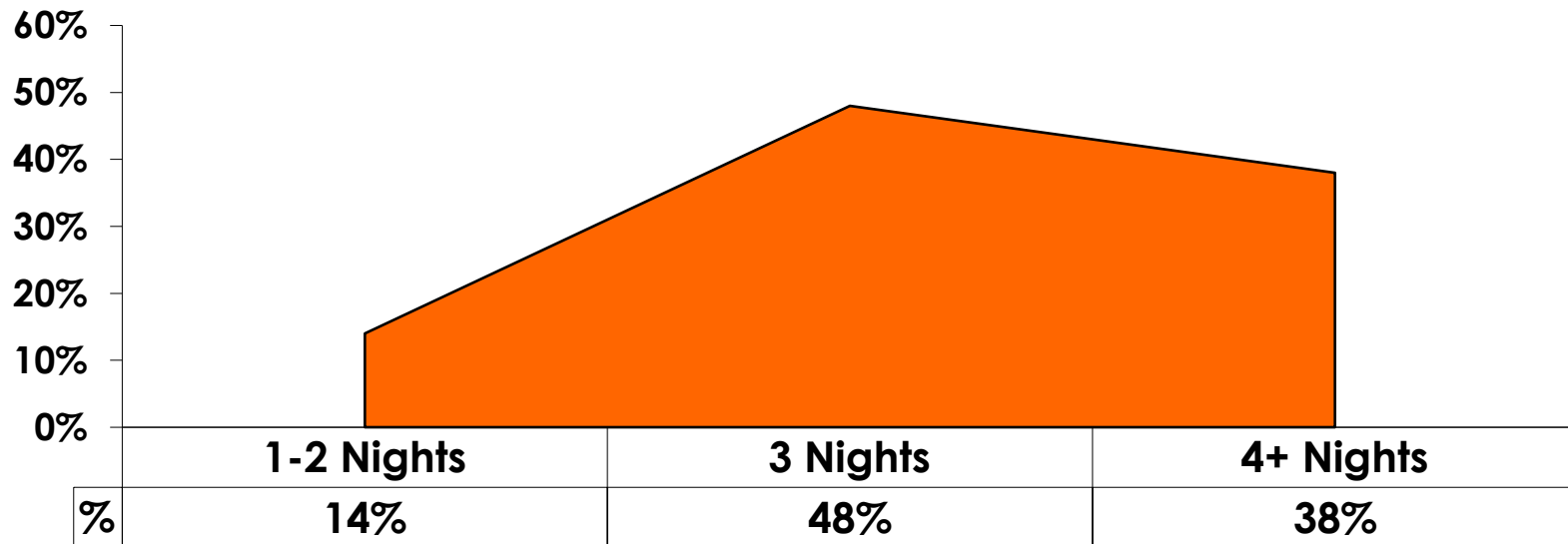
- The average repeat visitor has been to Guam 3.96 times.
- A little less than half of repeat visitors have been to Guam within the last 2 years.

Average Number Overnight Trips (2009-2015) (2 nights or more)

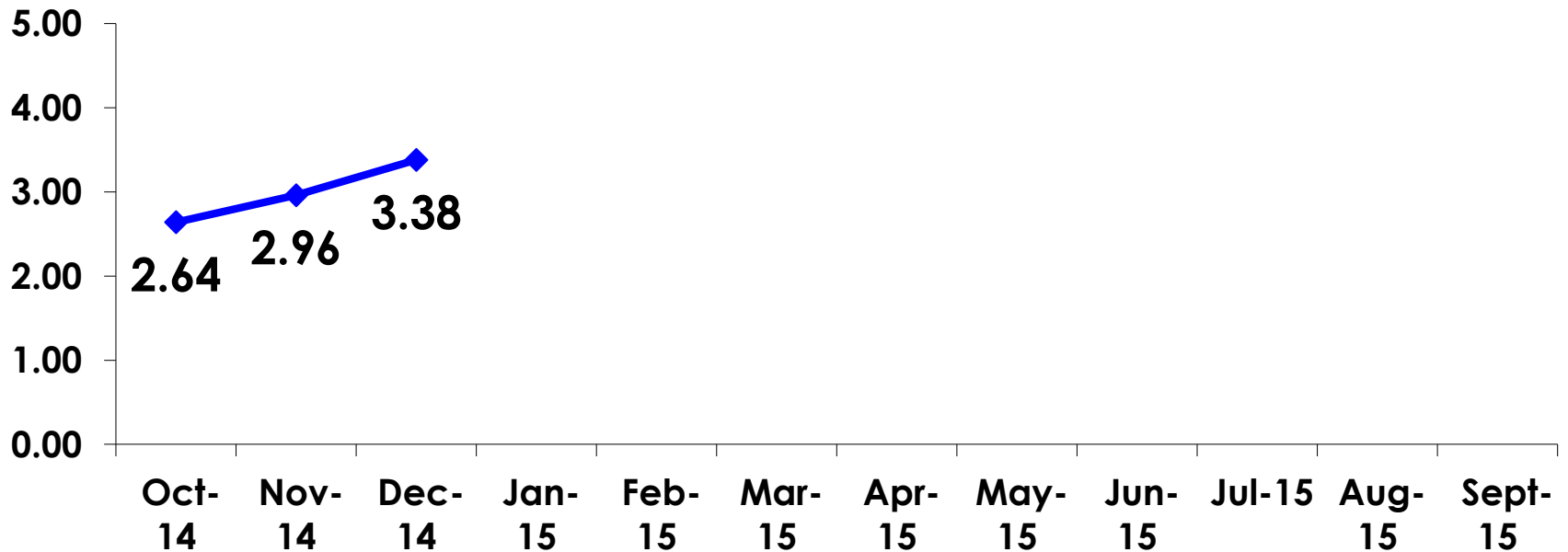


Length of Stay

Mean = 3.38 Days
Median = 3.0 Days



AVG LENGTH OF STAY

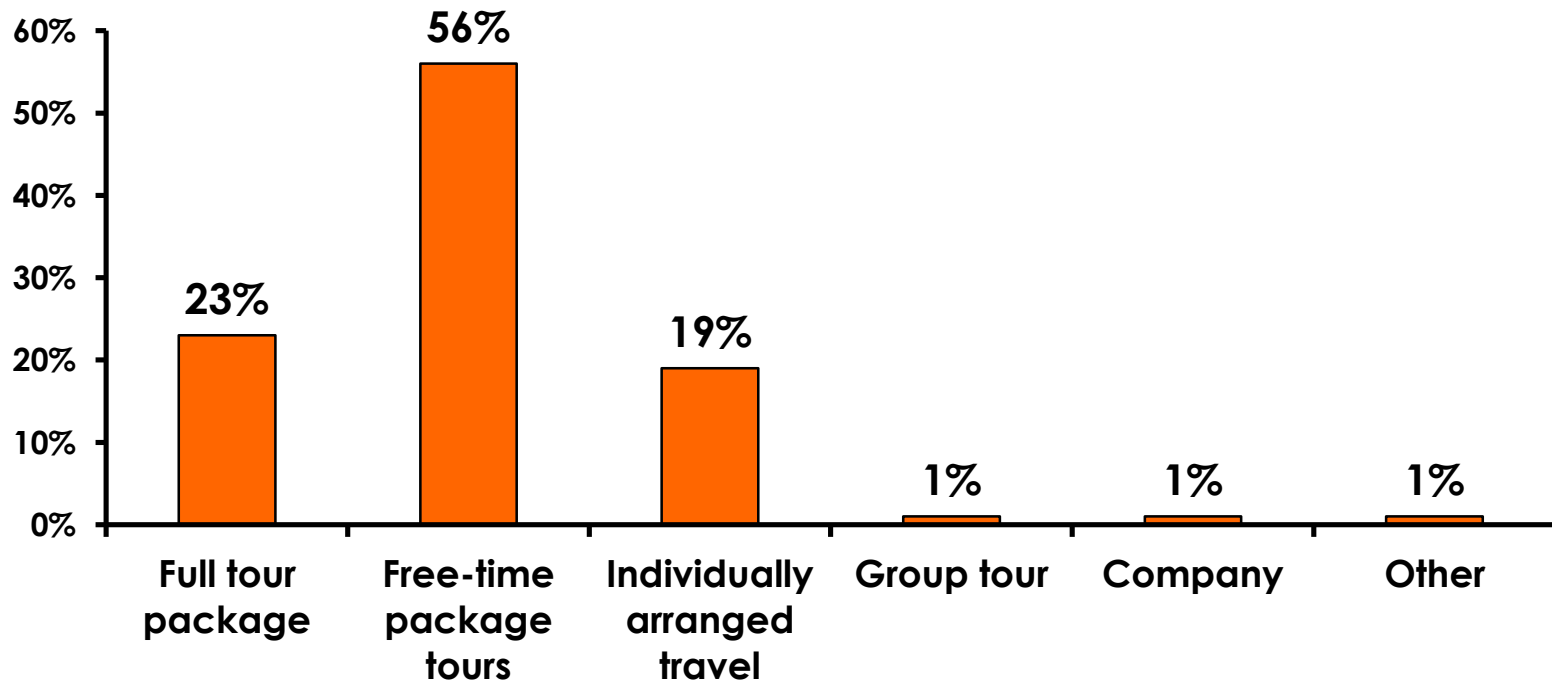


Occupation by Income

		TOTAL	Q26								
		-	<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	17%	17%	26%	25%	27%	13%	15%	12%		
	Engineer	13%		16%	10%	13%	14%	25%	10%		
	Student	11%	33%		5%	7%	7%	4%	3%	83%	
	Teacher	10%	17%	11%	15%		9%	13%	12%		
	Salesperson	10%		11%	13%	23%	16%	6%	4%	17%	
	Manager	8%				7%	9%	10%	14%		
	Govt- office worker non-mgr	7%	8%	16%	15%	3%	5%	4%	8%		
	Self-employed	6%		5%	3%	7%	7%	6%	6%		
	Homemaker	5%				3%	13%	2%	8%		
	Professional/ Specialist	4%	8%	5%	5%	3%		4%	5%		
	Executive (30+ employees)	3%						2%	12%		
	Other	3%	8%	5%	5%		2%	2%	3%		
	Govt- Manager	2%					4%	6%	4%		
	Freeter	1%		5%	3%			2%			
	Skilled worker	1%				3%	2%				
	Govt- Executive	1%			3%	3%					
	Unemployed	0%	8%								
	Total	Count	331	12	19	40	30	56	52	77	6

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

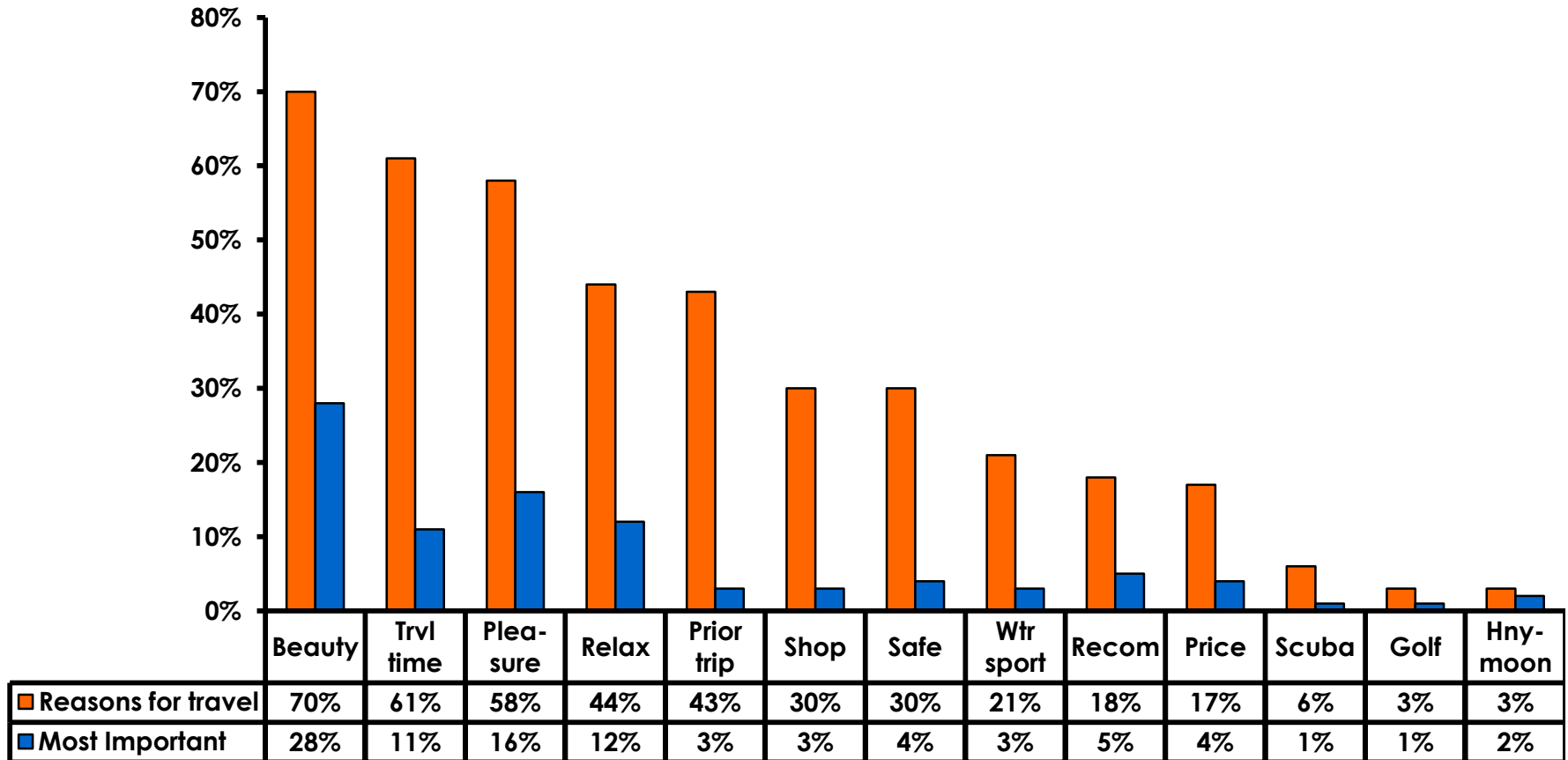


Accommodation by Income

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	Guam Plaza Hotel	10%	17%	11%	15%	10%	11%	6%	9%	17%	
	Outrigger Guam Resort	9%		11%	13%	6%	5%	12%	10%	17%	
	Hilton Guam Resort	9%		11%	10%	13%	5%	8%	10%	17%	
	Fiesta Resort Guam	8%	17%	6%	5%	3%	16%	6%	6%		
	Westin Resort Guam	8%		17%	8%	10%	4%	4%	12%		
	PIC Club	8%	8%		5%	10%	9%	15%	6%	17%	
	Grand Plaza Hotel	7%	25%	11%	18%		4%	6%		17%	
	Hotel Nikko Guam	6%	8%		3%	6%	5%	8%	10%		
	Onward Beach Resort	5%		6%	3%	3%	4%	13%	4%		
	Royal Orchid Guam	5%		6%	5%	10%	2%	10%	1%		
	Guam Reef & Olive Spa	5%	8%	6%	3%	10%	9%	2%	5%		
	Leo Palace Resort	4%			8%		4%	2%	4%		
	Hyatt Regency Guam	2%				3%	5%		4%		
	Other	2%	8%		3%	3%			1%	17%	
	Oceanview Hotel	2%					4%	2%	3%		
	Holiday Resort Guam	2%	8%			3%	4%	4%			
	Pacific Star Resort & Spa	2%				3%	2%		4%		
	Condo	1%			3%	3%		2%	1%		
	Sheraton Laguna Guam	1%				3%	4%		1%		
	Tumon Bay Capital Hotel	1%		11%							
	Bayview Hotel	1%		6%			2%		1%		
	Lotte Hotel Guam	1%			3%		2%				
	Days Inn (Tamuning)	1%						2%	1%		
	Pacific Bay Hotel	1%							3%		
	Aqua Suites	0%							1%		
	Home stay/ friend/ relative	0%					2%				
	Total	Count	349	12	18	40	31	56	52	77	6

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

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

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	70%	69%	76%	71%	62%	73%	69%	
	Short travel time	61%	36%	56%	72%	72%	66%	56%	
	Pleasure	58%	54%	62%	59%	52%	57%	59%	
	Relax	44%	38%	49%	42%	46%	42%	46%	
	Previous trip	43%	23%	32%	56%	52%	50%	36%	
	Safe	30%	23%	24%	36%	36%	37%	24%	
	Shopping	30%	41%	29%	24%	36%	29%	31%	
	Water sports	21%	15%	26%	21%	22%	23%	20%	
	Recomm- friend/family/trvl agnt	18%	28%	25%	9%	16%	13%	22%	
	Price	17%	23%	20%	16%	8%	16%	19%	
	Scuba	6%	11%	4%	5%	8%	5%	7%	
	Other	3%	3%	1%	4%	8%	2%	5%	
	Honeymoon	3%	2%	8%	1%		5%	1%	
	Golf	3%			4%	10%	5%	1%	
	Organized sports	2%	3%	4%	1%		2%	2%	
	Company/ Business Trip	2%	2%	2%	1%	2%	2%	2%	
	Visit friends/ Relatives	1%		4%	1%		1%	2%	
	Company Sponsored	1%		1%	1%	2%	2%		
	Married/ Attn wedding	0%		1%				1%	
	Total	Count	349	61	100	137	50	171	178

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	70%	75%	79%	70%	61%	61%	75%	74%	83%	
	Short travel time	61%	58%	42%	48%	48%	68%	63%	69%	67%	
	Pleasure	58%	67%	68%	60%	61%	55%	62%	61%	67%	
	Relax	44%	42%	37%	53%	42%	41%	42%	53%	33%	
	Previous trip	43%	25%	21%	40%	26%	55%	52%	55%	17%	
	Safe	30%	17%	21%	20%	29%	36%	38%	34%	50%	
	Shopping	30%		37%	28%	32%	27%	27%	38%	33%	
	Water sports	21%	8%	11%	23%	23%	21%	23%	31%		
	Recomm- friend/family/trvl agnt	18%	25%	32%	25%	32%	20%	15%	5%	17%	
	Price	17%	17%	5%	28%	23%	11%	19%	13%	17%	
	Scuba	6%	8%		5%	6%	14%	4%	5%	33%	
	Other	3%	8%				5%	2%	4%		
	Honeymoon	3%		5%	3%	13%	5%				
	Golf	3%						2%	10%		
	Organized sports	2%			8%	3%			1%		
	Company/ Business Trip	2%		5%	3%	6%					
	Visit friends/ Relatives	1%				3%	4%		3%		
	Company Sponsored	1%				6%					
	Married/ Attn wedding	0%						2%			
	Total	Count	349	12	19	40	31	56	52	77	6

SECTION 3 **EXPENDITURES**

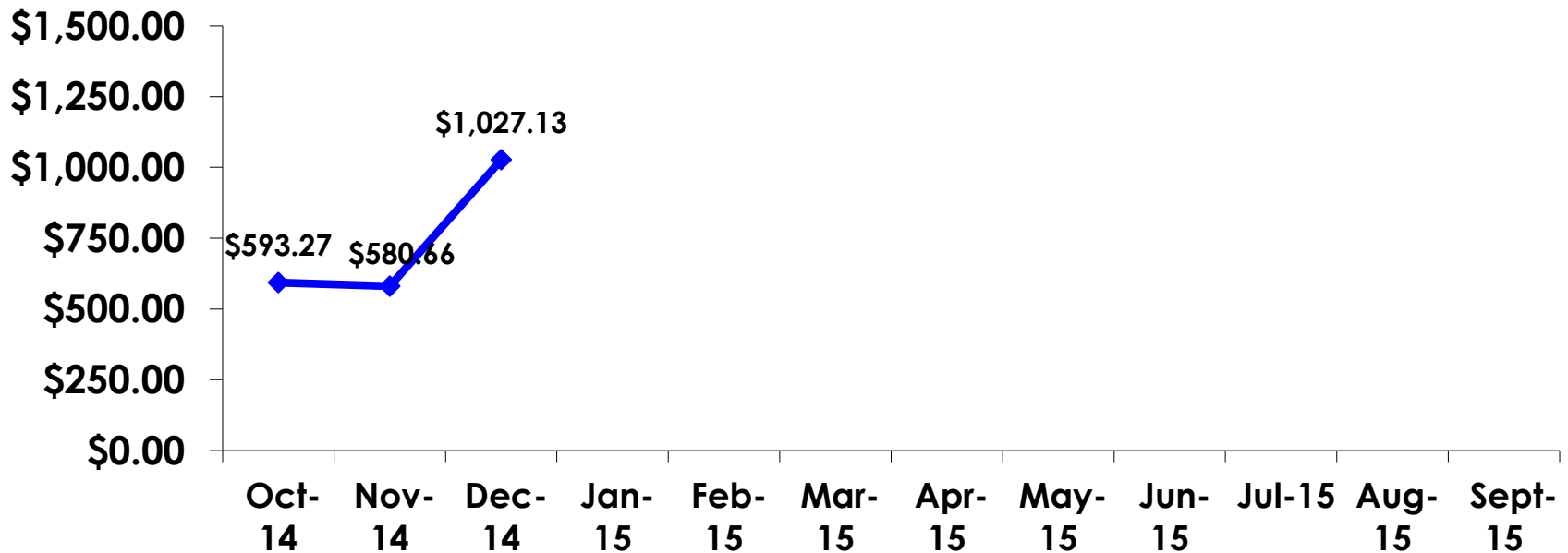
Prepaid Expenditures

¥119.56/US\$1

- \$2,548.97 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$24,256 = maximum (highest amount recorded for the entire sample)
- \$1,027.13 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$733.97

Breakdown of Prepaid Expenditures

¥119.56=\$1

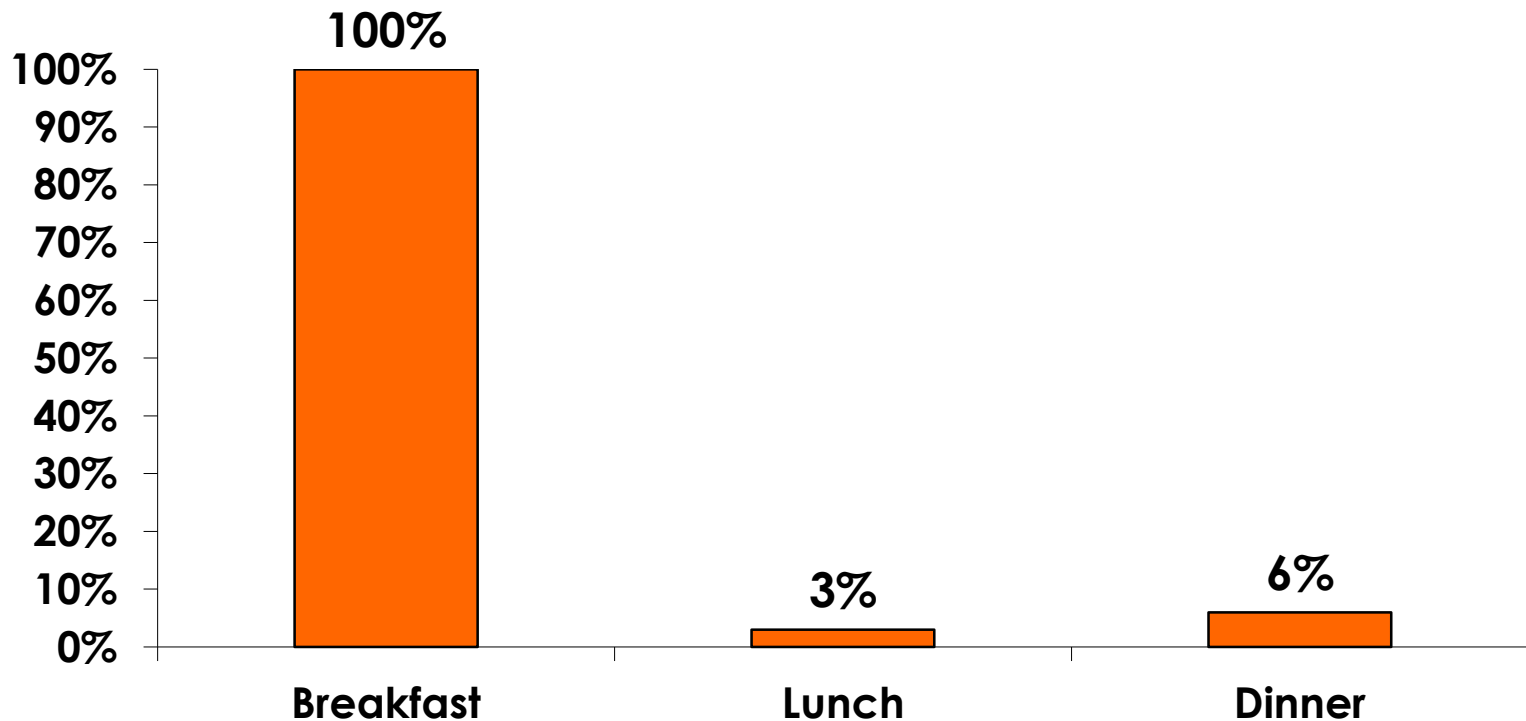
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$2,672.03
Air & Accommodation w/ daily meal package	\$4,482.58
Air only	\$2,317.37
Accommodation only	\$1,193.65
Accommodation w/ daily meal only	\$3,303.78
Food & Beverages in Hotel	\$112.91
Ground transportation – Japan	\$104.87
Ground transportation – Guam	\$129.64
Optional tours/ activities	\$489.64
Other expenses	\$313.65
Total Prepaid	\$2,548.97

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=32

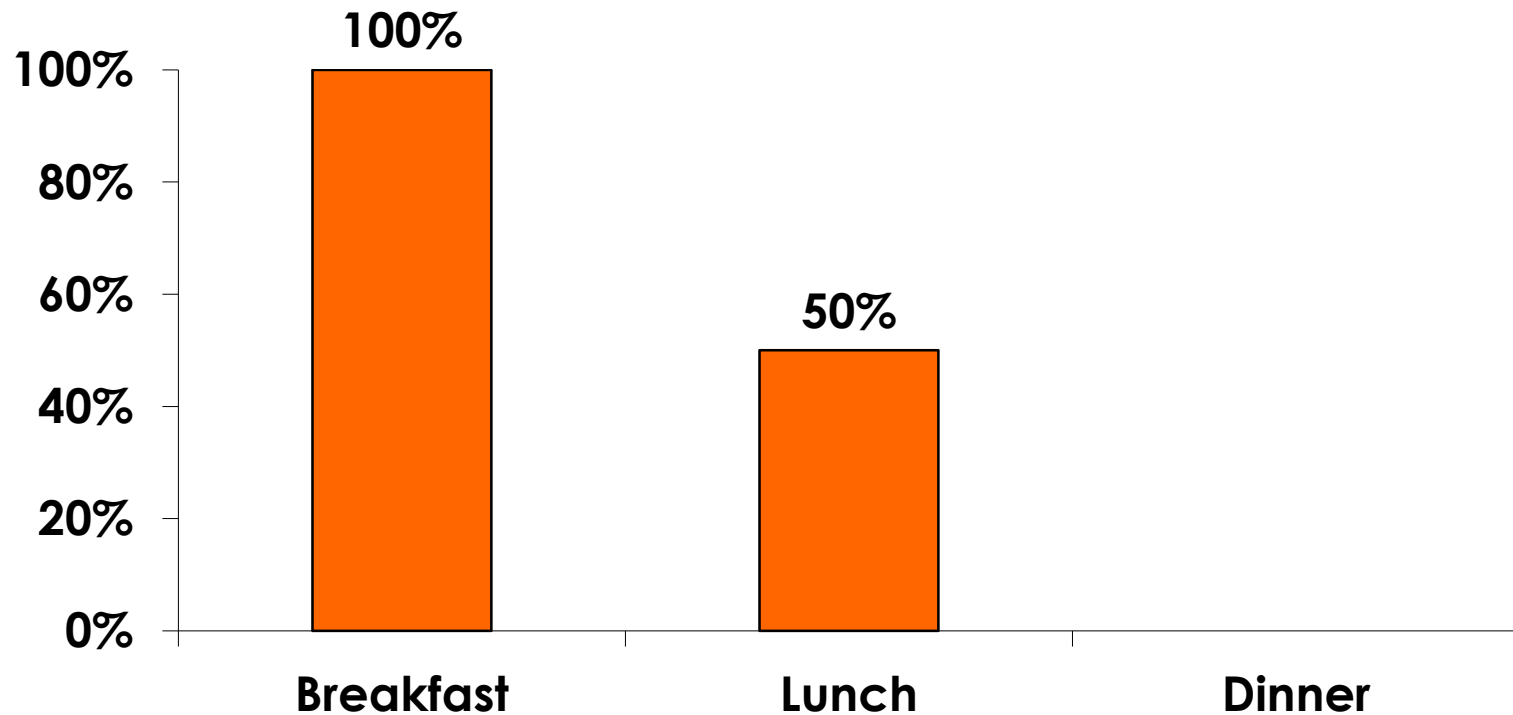


Mean=\$4,482.58 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

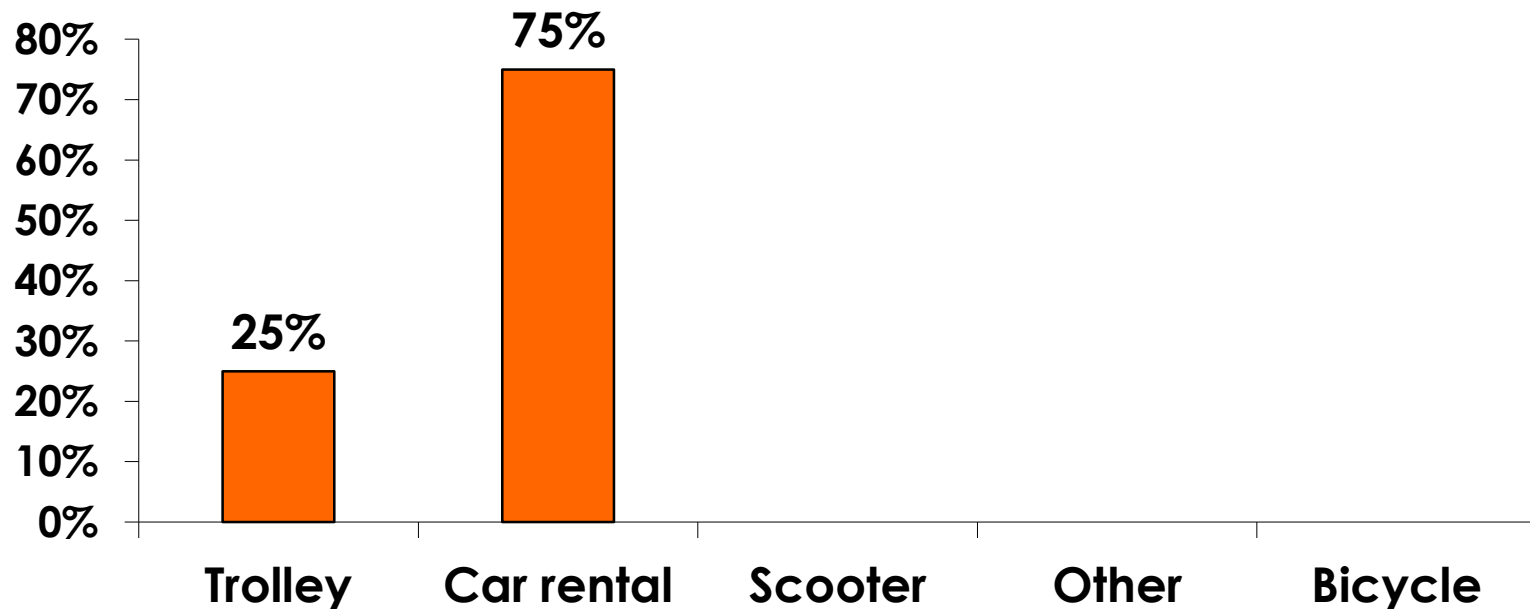
n=2



Mean=\$3,303.78 per travel party

PREPAID GROUND TRANSPORTATION

n=4



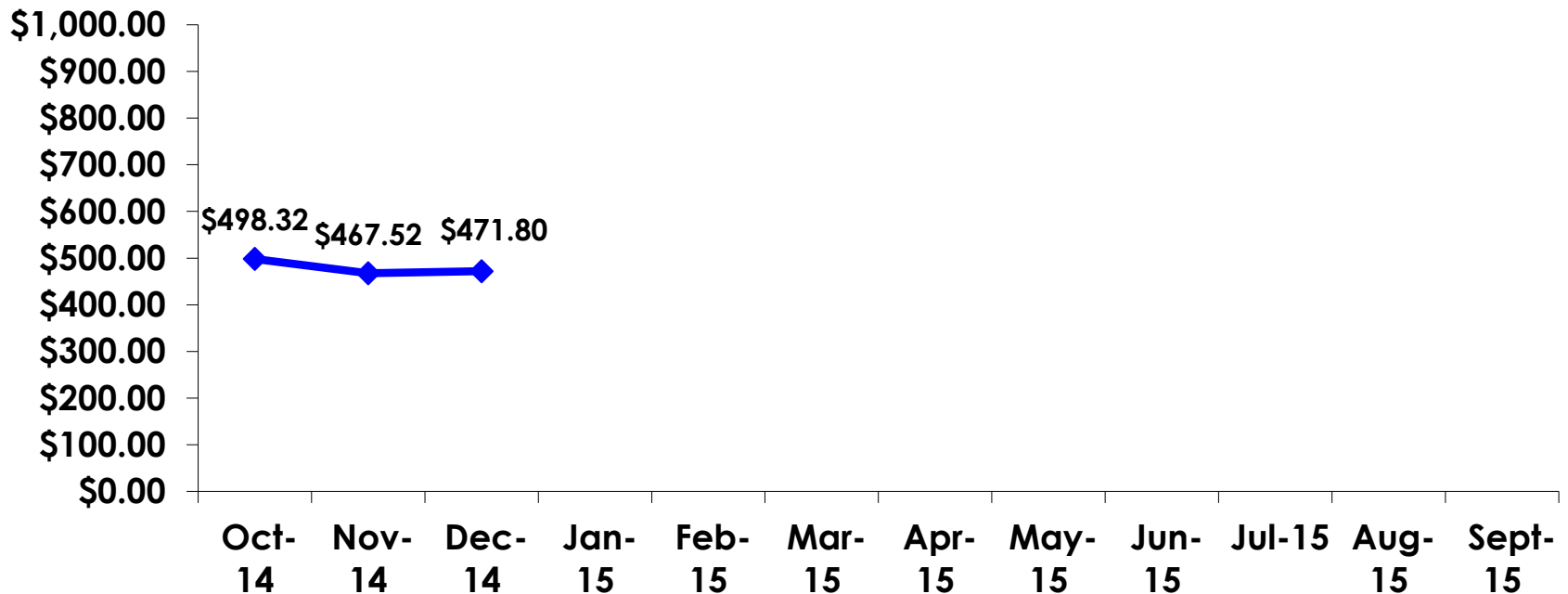
Mean=\$129.64 per travel party

On-Island Expenditures

- \$1,021.04 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,000 = Maximum (highest amount recorded for the entire sample)
- \$471.80 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

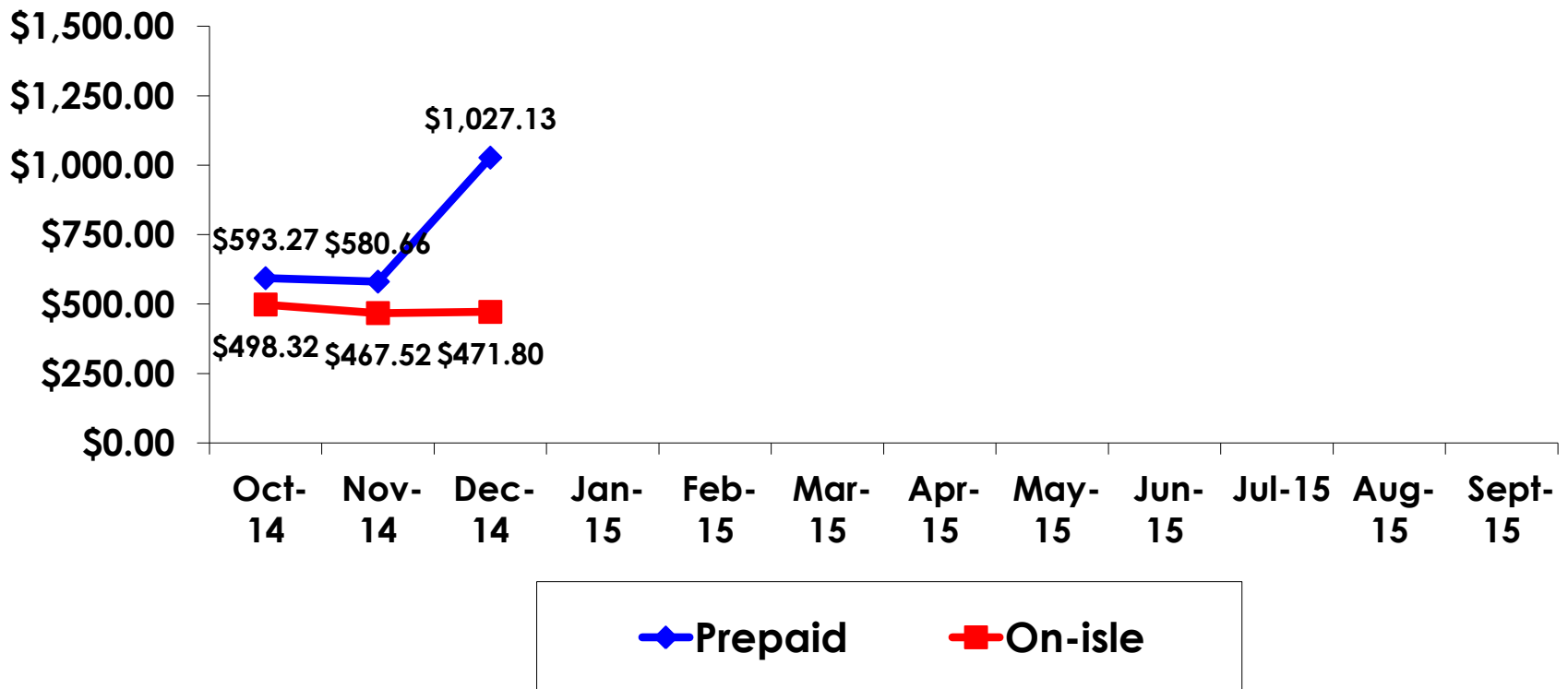


YTD = \$479.20

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$733.97

On-Isle YTD = \$479.20



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	\$471.80	\$466.94	\$476.51	\$353.21	\$519.33	\$432.62	\$515.96	\$449.93	\$582.15	\$342.66	\$635.21
	Median	\$348	\$333	\$350	\$350	\$400	\$289	\$452	\$400	\$400	\$273	\$566
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,000	\$3,000	\$2,500	\$800	\$2,670	\$3,000	\$2,000	\$1,500	\$2,500	\$1,500	\$1,525

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$58.62	\$83.62	\$34.31	\$12.24	\$14.50	\$92.51	\$111.98
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$30
F&B FF/STORE	Mean	\$46.23	\$60.46	\$32.39	\$35.60	\$32.19	\$58.72	\$53.90
	Median	\$5	\$17	\$0	\$0	\$9	\$0	\$23
F&B RESTRNT	Mean	\$106.62	\$146.68	\$67.68	\$60.68	\$90.18	\$131.97	\$128.60
	Median	\$20	\$50	\$0	\$0	\$30	\$30	\$50
OPT TOUR	Mean	\$78.31	\$96.63	\$60.50	\$65.00	\$56.12	\$91.25	\$105.02
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$216.57	\$261.34	\$173.06	\$114.55	\$146.85	\$269.28	\$341.38
	Median	\$7	\$0	\$10	\$0	\$20	\$0	\$100
GIFT- OTHER	Mean	\$103.54	\$124.94	\$82.74	\$57.53	\$85.40	\$129.83	\$126.36
	Median	\$50	\$100	\$45	\$20	\$55	\$50	\$100
TRANS	Mean	\$25.71	\$34.65	\$17.02	\$8.35	\$21.88	\$32.91	\$35.54
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$394.28	\$400.88	\$387.87	\$159.71	\$392.15	\$438.55	\$495.12
	Median	\$0	\$0	\$23	\$0	\$15	\$0	\$60
TOTAL	Mean	\$1,021.04	\$1,193.21	\$853.71	\$494.31	\$842.17	\$1,229.17	\$1,397.90
	Median	\$700	\$800	\$555	\$409	\$600	\$805	\$1,000

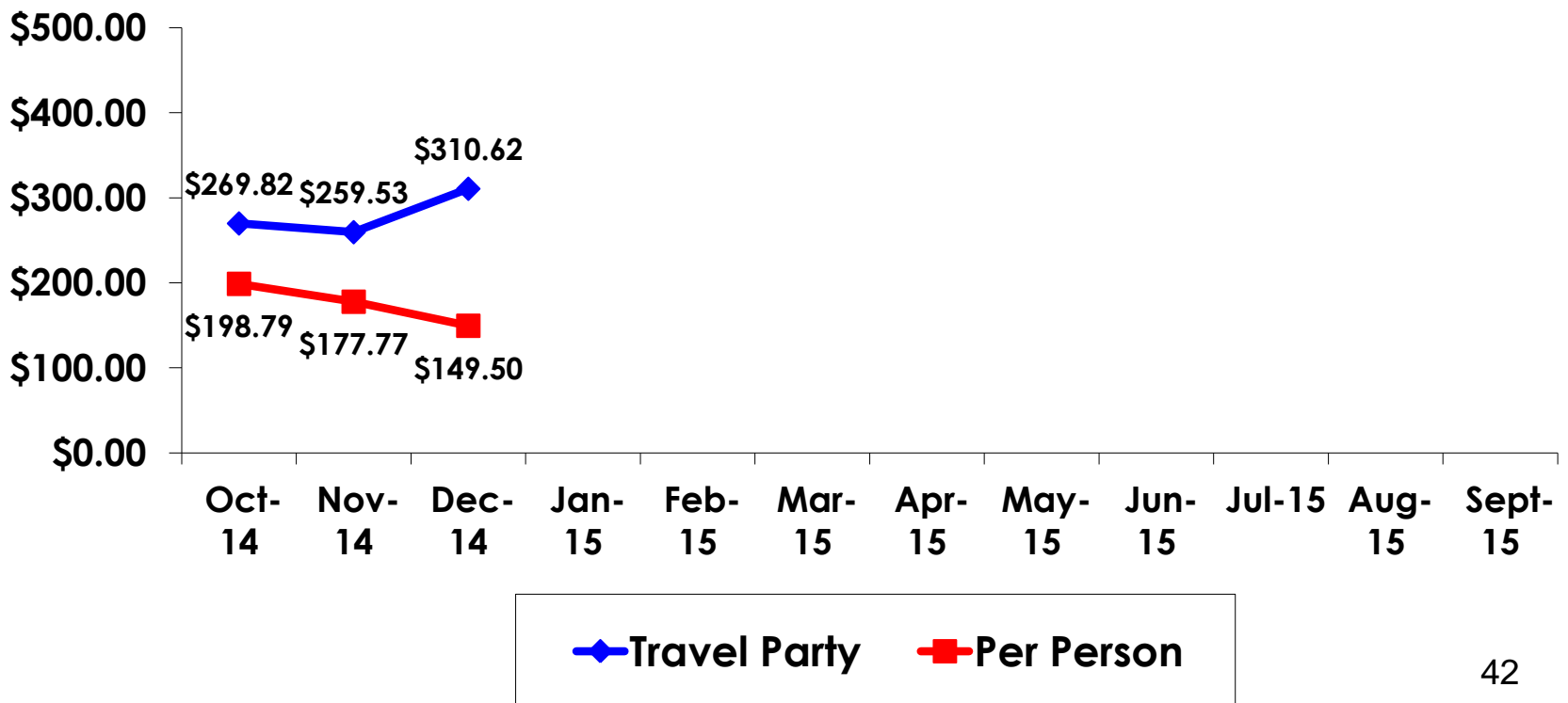
On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$58.62	\$42.29	\$74.48
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$46.23	\$53.76	\$38.90
	Median	\$5	\$10	\$0
F&B RESTRNT	Mean	\$106.62	\$86.23	\$126.43
	Median	\$20	\$0	\$30
OPT TOUR	Mean	\$78.31	\$77.23	\$79.36
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$216.57	\$174.39	\$257.56
	Median	\$7	\$7	\$8
GIFT- OTHER	Mean	\$103.54	\$107.94	\$99.26
	Median	\$50	\$50	\$50
TRANS	Mean	\$25.71	\$23.66	\$27.70
	Median	\$0	\$0	\$0
OTHER	Mean	\$394.28	\$417.10	\$372.10
	Median	\$0	\$16	\$0
TOTAL	Mean	\$1,021.04	\$970.07	\$1,070.58
	Median	\$700	\$600	\$800

ON-ISLE EXPENDITURES – Per Day

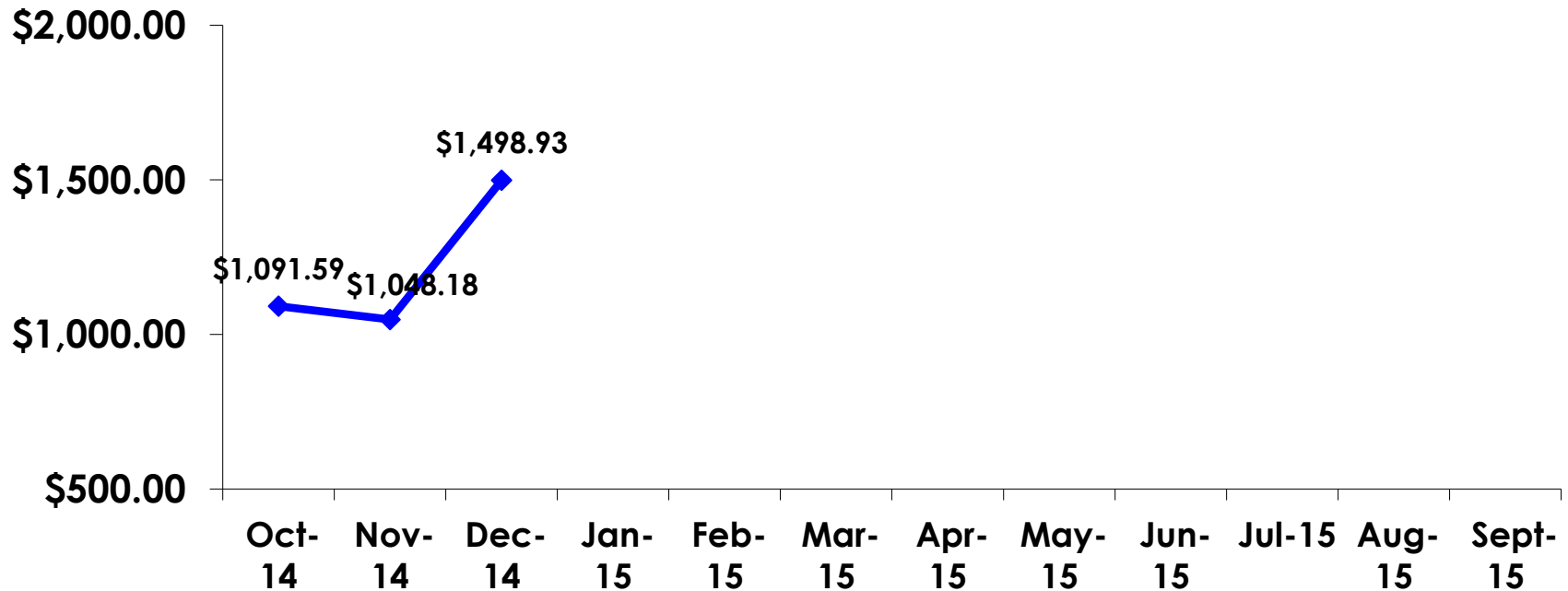
Travel Party YTD = \$280.01 Per Person YTD = \$175.35



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,498.93 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,438 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



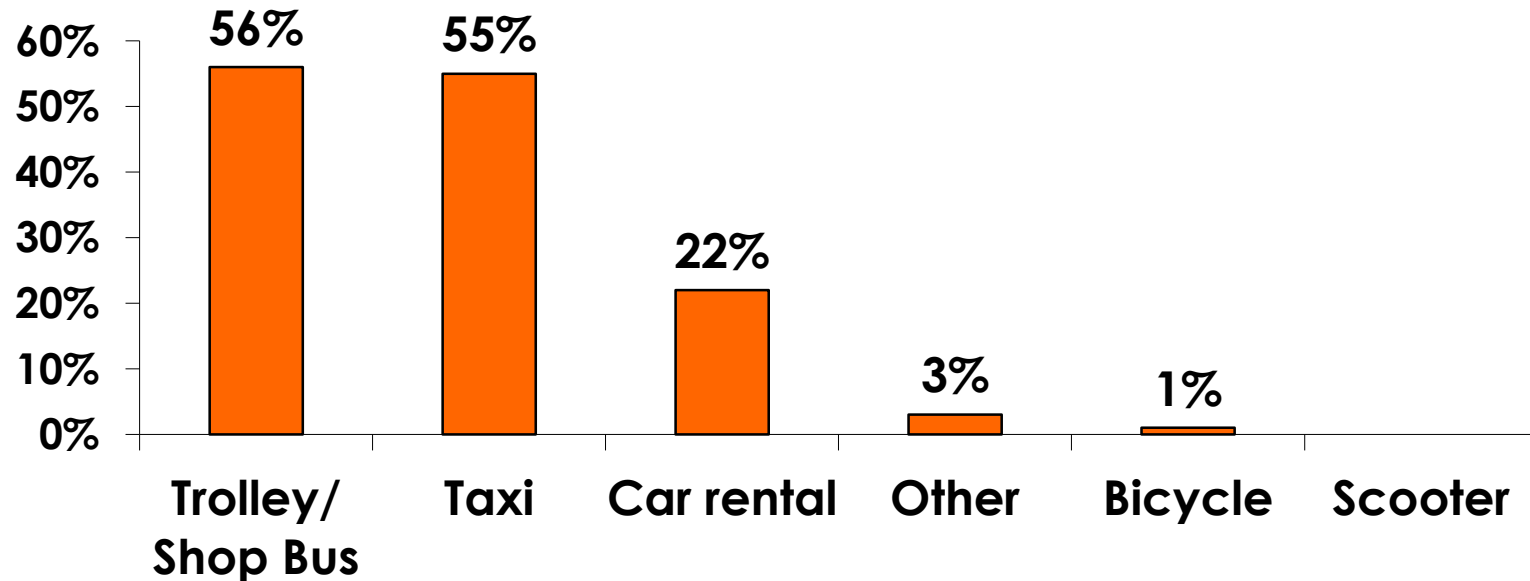
YTD=\$1,213.17

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$58.62
Food & beverage in fast food restaurant/convenience store	\$46.23
Food & beverage at restaurants or drinking establishments outside a hotel	\$106.62
Optional tours and activities	\$78.31
Gifts/ souvenirs for yourself/companions	\$216.57
Gifts/ souvenirs for friends/family at home	\$103.54
Local transportation	\$25.71
Other expenses not covered	\$394.28
Average Total	\$1,021.04

Local Transportation

n=73



Mean=\$25.71 per travel party

Guam Airport Expenditures

- \$29.88 = 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

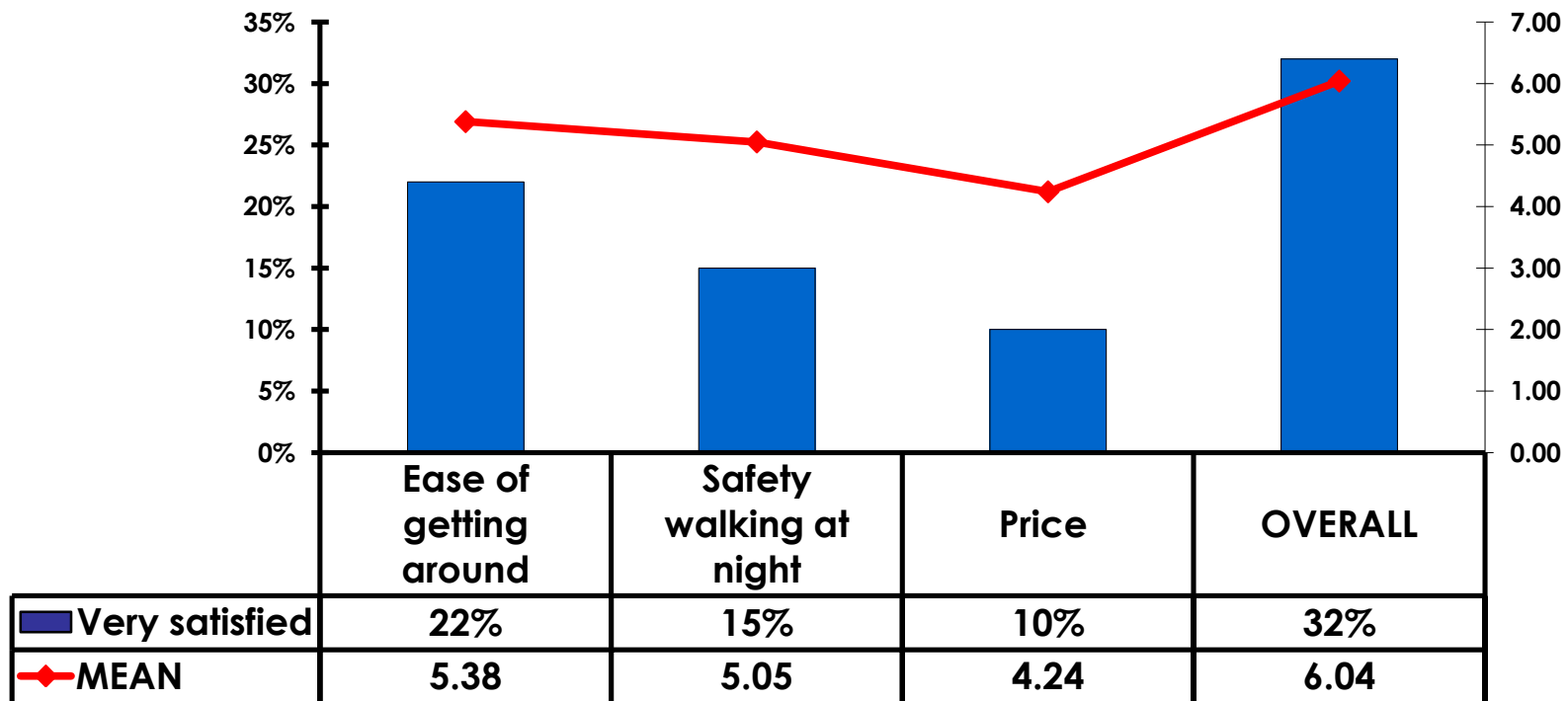
	MEAN \$
Food & Beverages	\$10.08
Gifts/Souvenirs Self	\$9.23
Gifts/Souvenirs Others	\$10.57
Total	\$29.88

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

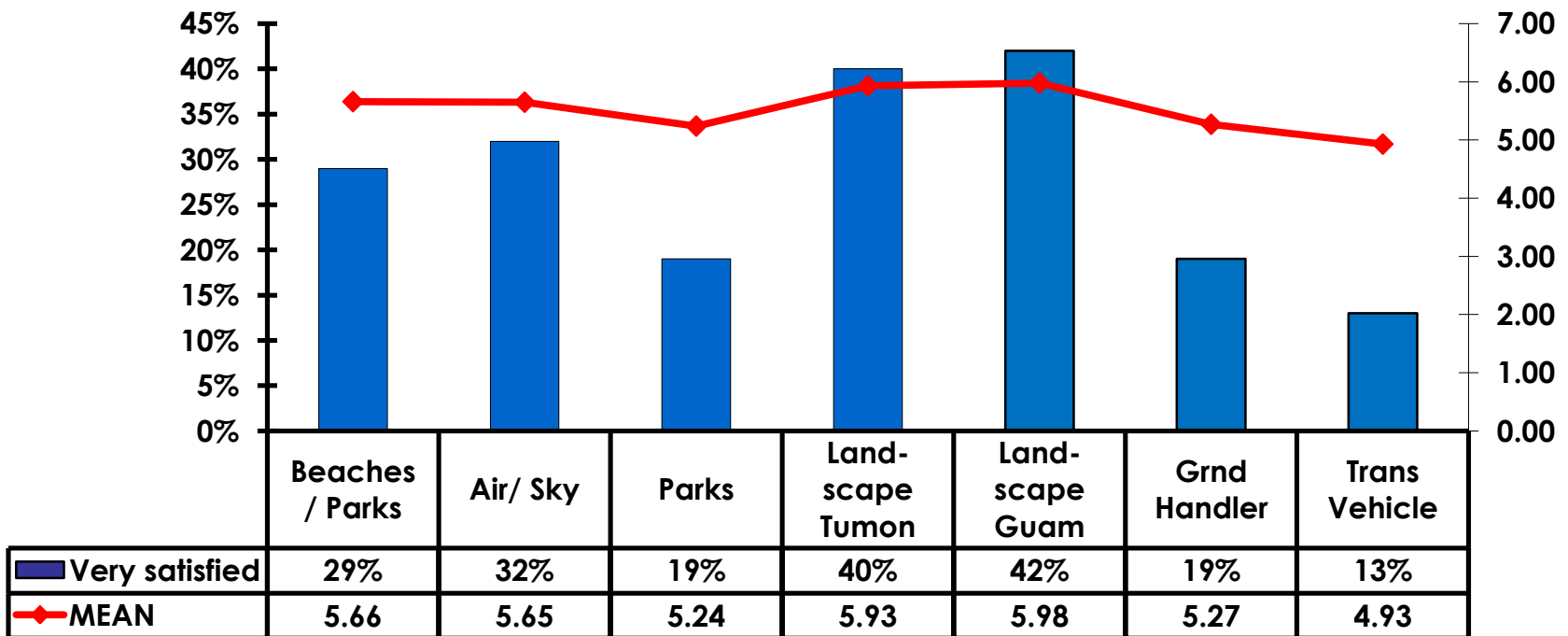
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

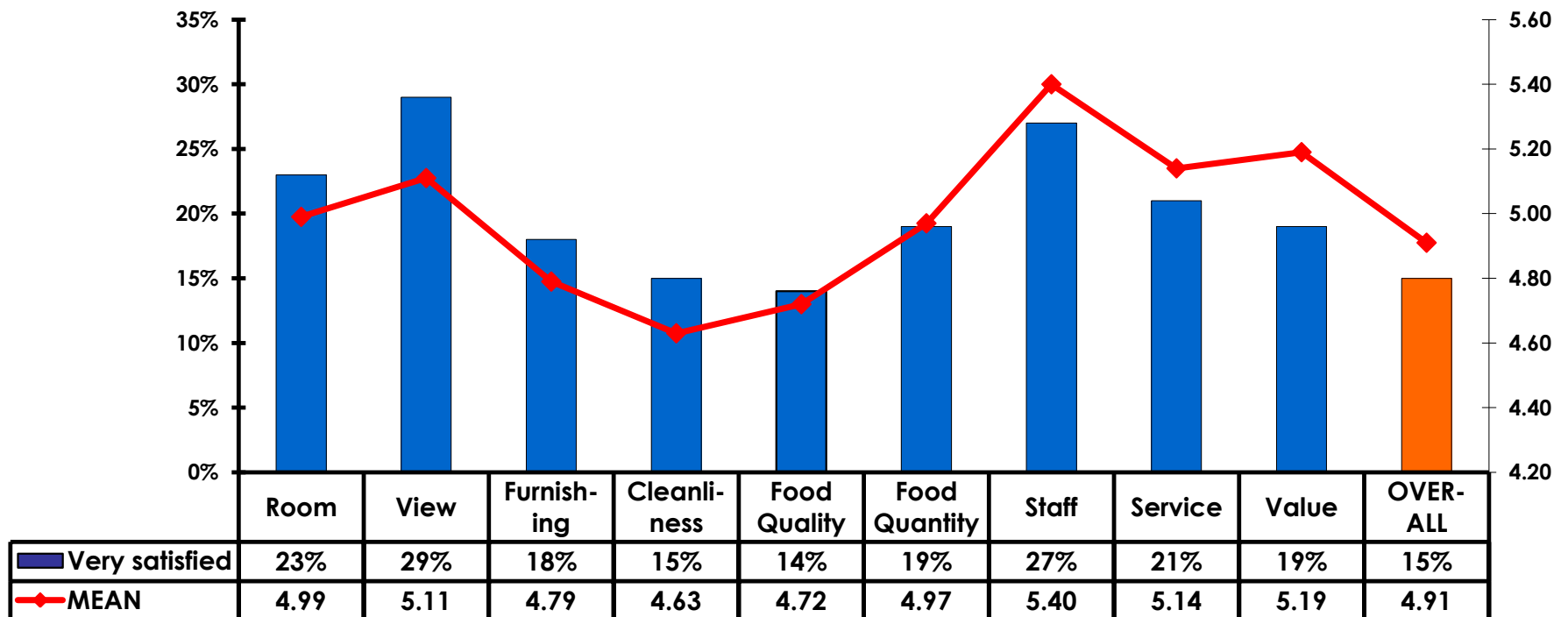
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

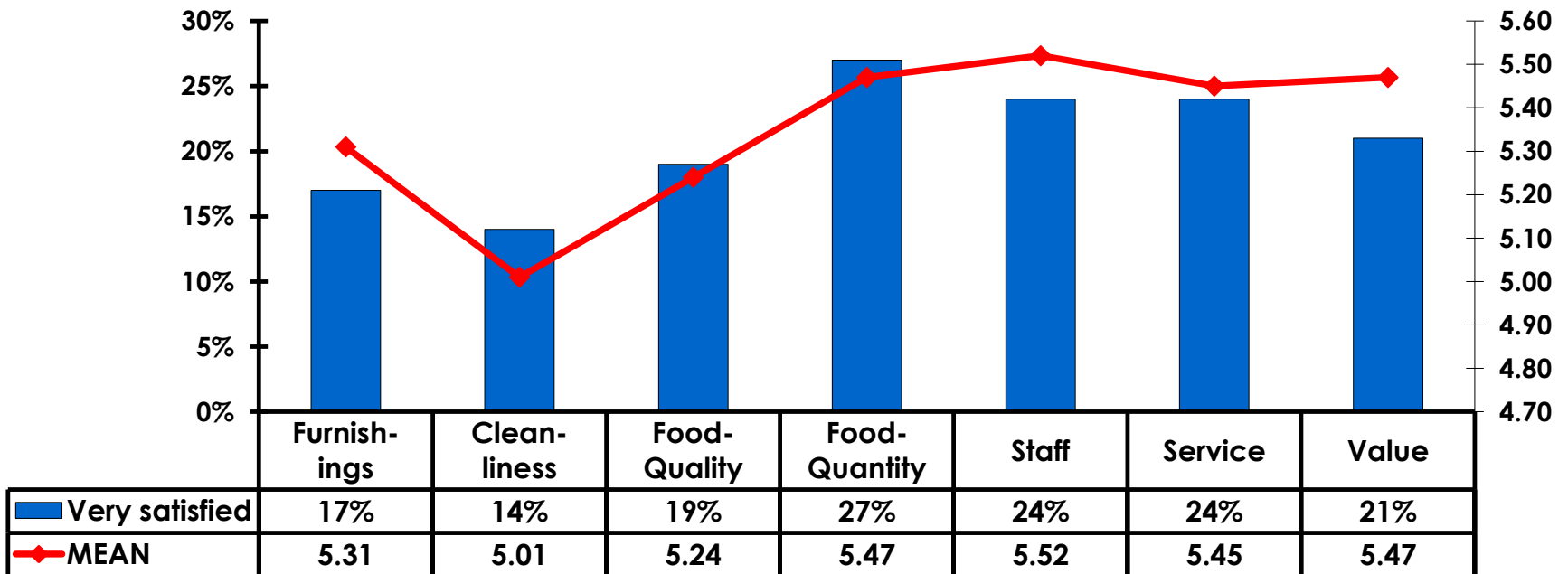
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

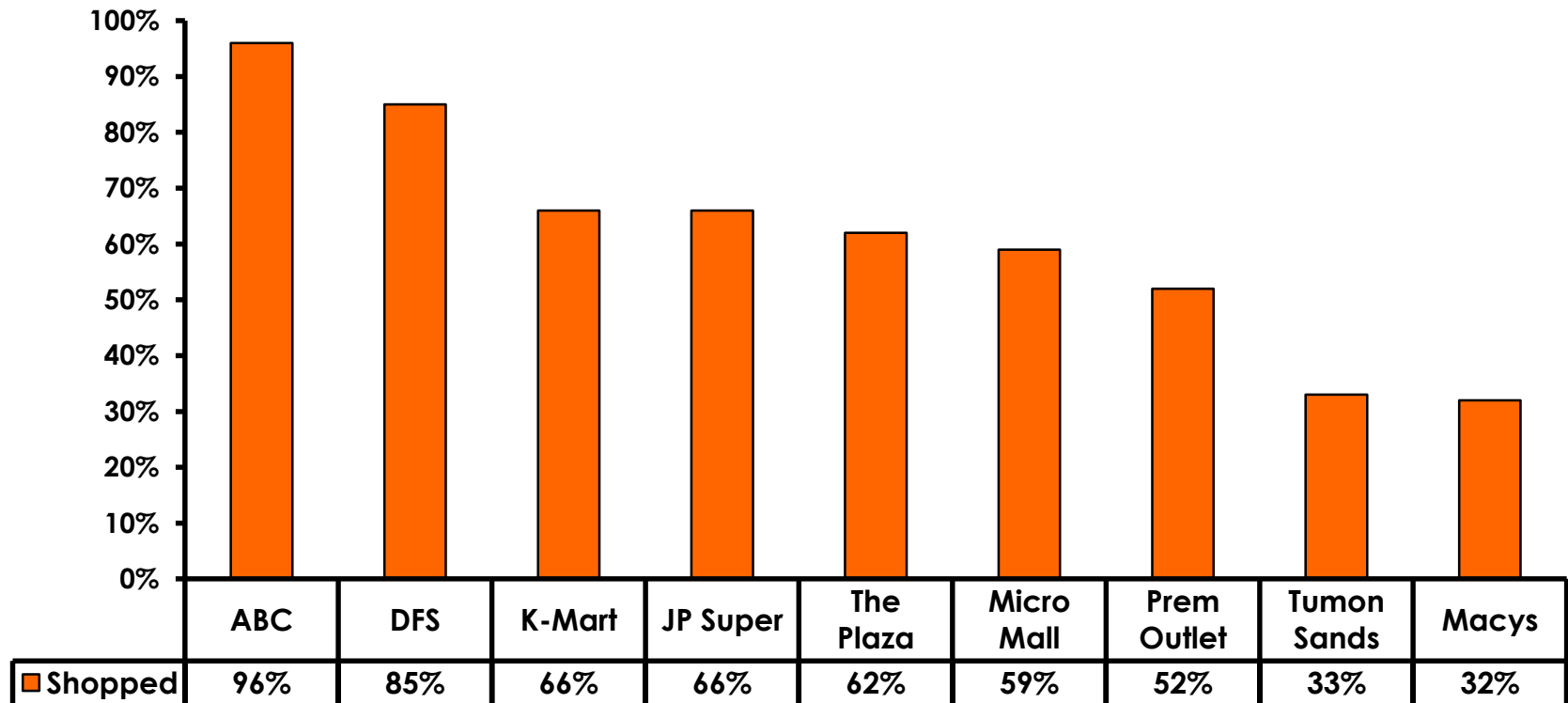
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

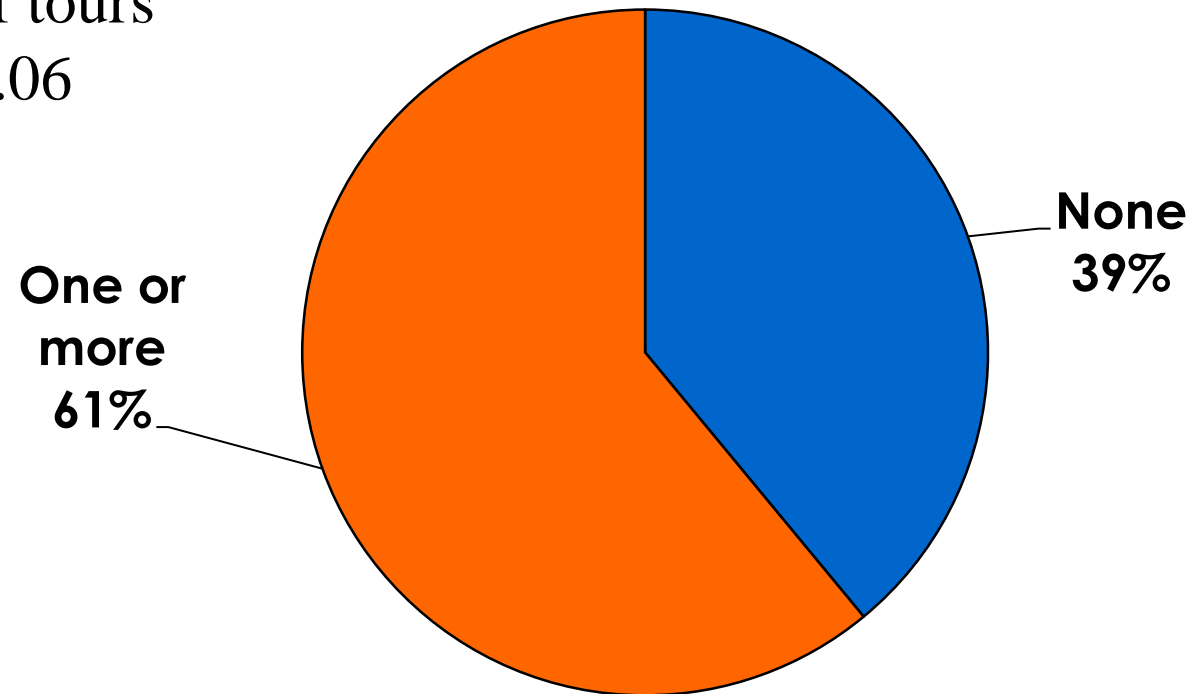
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

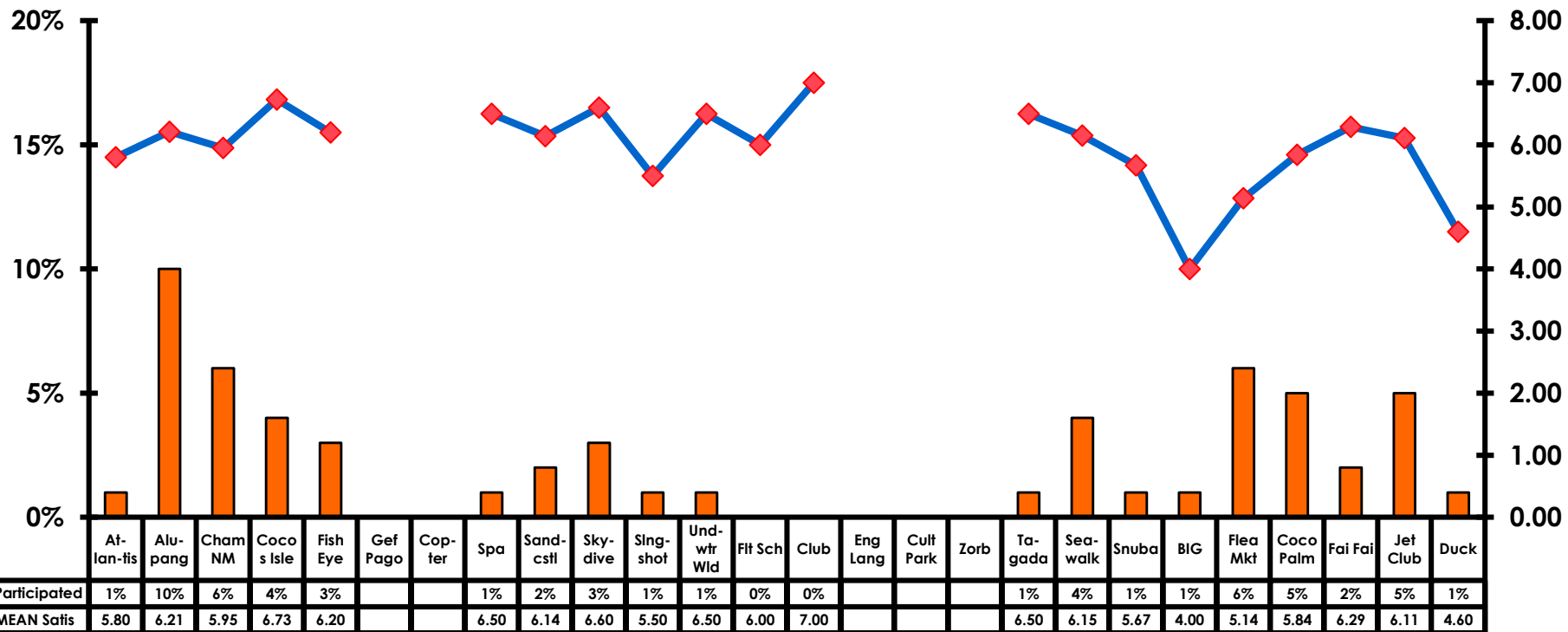
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 47%	Score of 6 to 7 = 46%
Score of 4 to 5 = 45%	Score of 4 to 5 = 45%
Score 1 to 3 = 8%	Score 1 to 3 = 9%
MEAN = 5.23	MEAN = 5.19

Optional Tour Participation

- Average number of tours participated in is 1.06



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 = 59%	Score of 6 to 7 = 56%
Score of 4 to 5 = 39%	Score of 4 to 5 = 40%
Score 1 to 3 = 2%	Score 1 to 3 = 3%
MEAN = 5.59	MEAN = 5.49

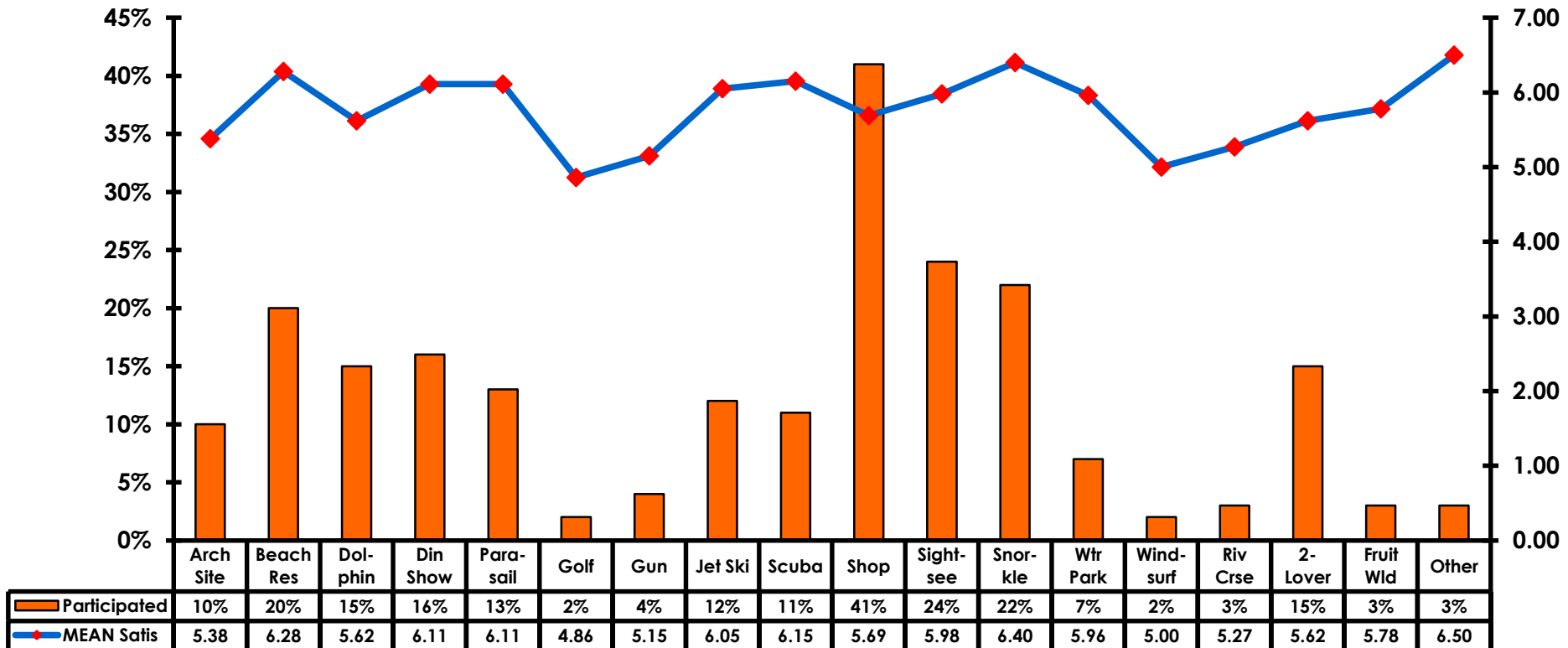
Night Tours Satisfaction

7pt Rating Scale

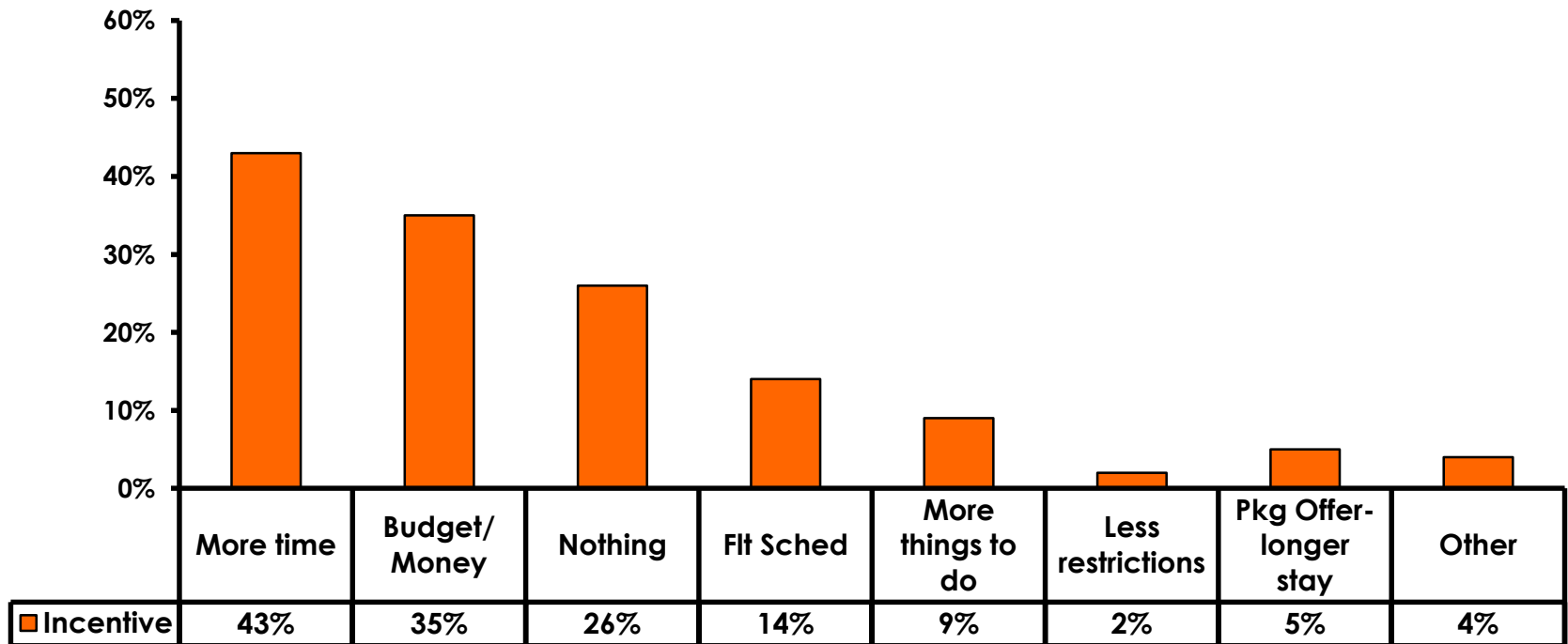
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 30%	Score of 6 to 7 = 29%
Score of 4 to 5 = 66%	Score of 4 to 5 = 68%
Score 1 to 3 = 3%	Score 1 to 3 = 3%
MEAN = 4.78	MEAN = 4.78

Satisfaction with Other Activities



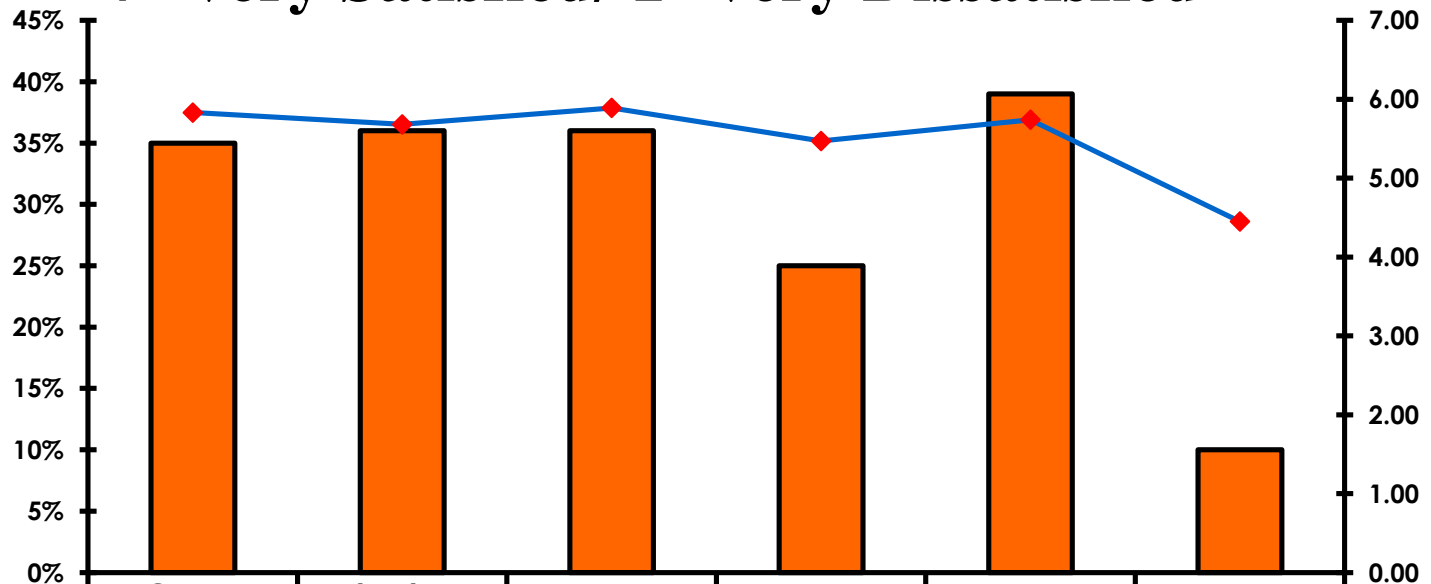
What would it take to make you want to stay an extra day in Guam?





On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

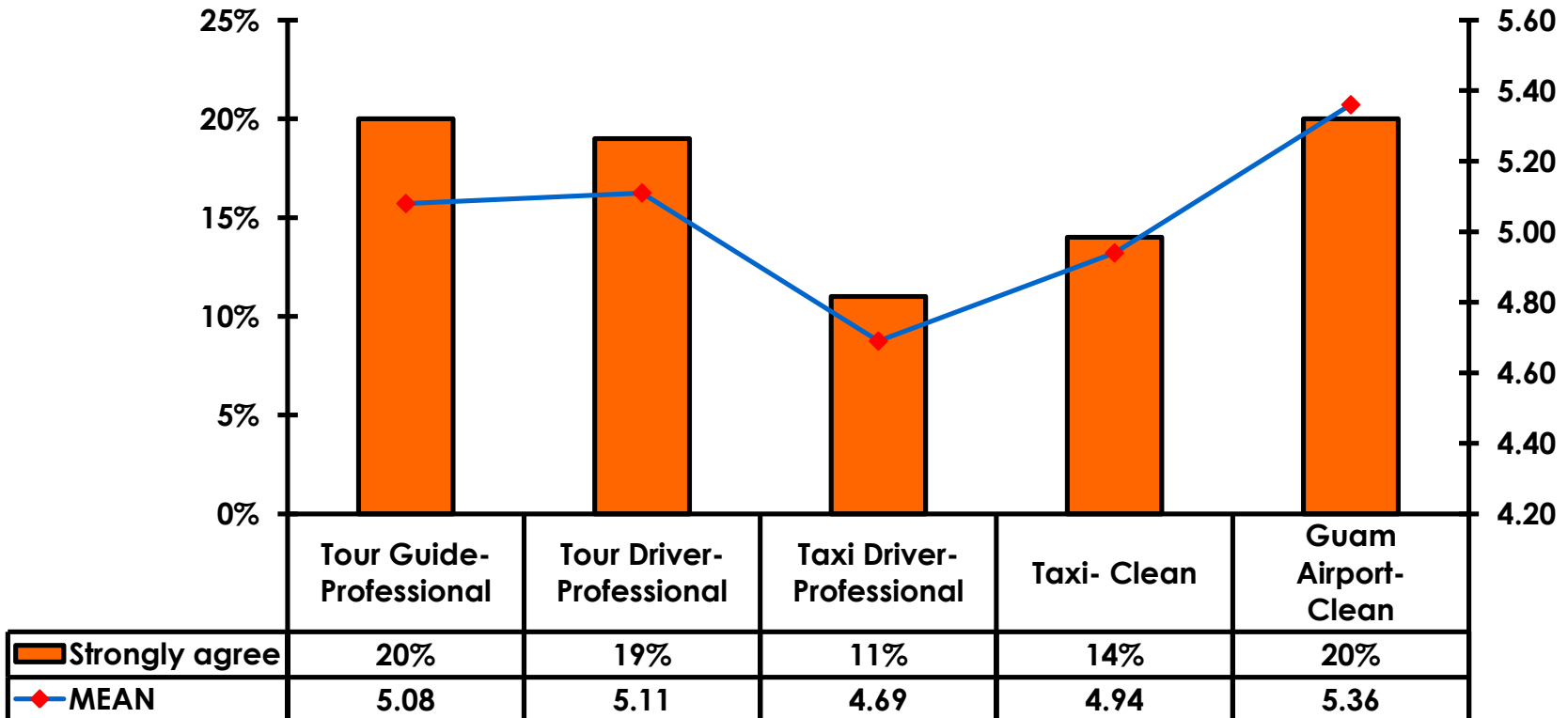


 Strongly agree	35%	36%	36%	25%	39%	10%
 MEAN	5.83	5.68	5.89	5.47	5.74	4.45

On-Island Perceptions

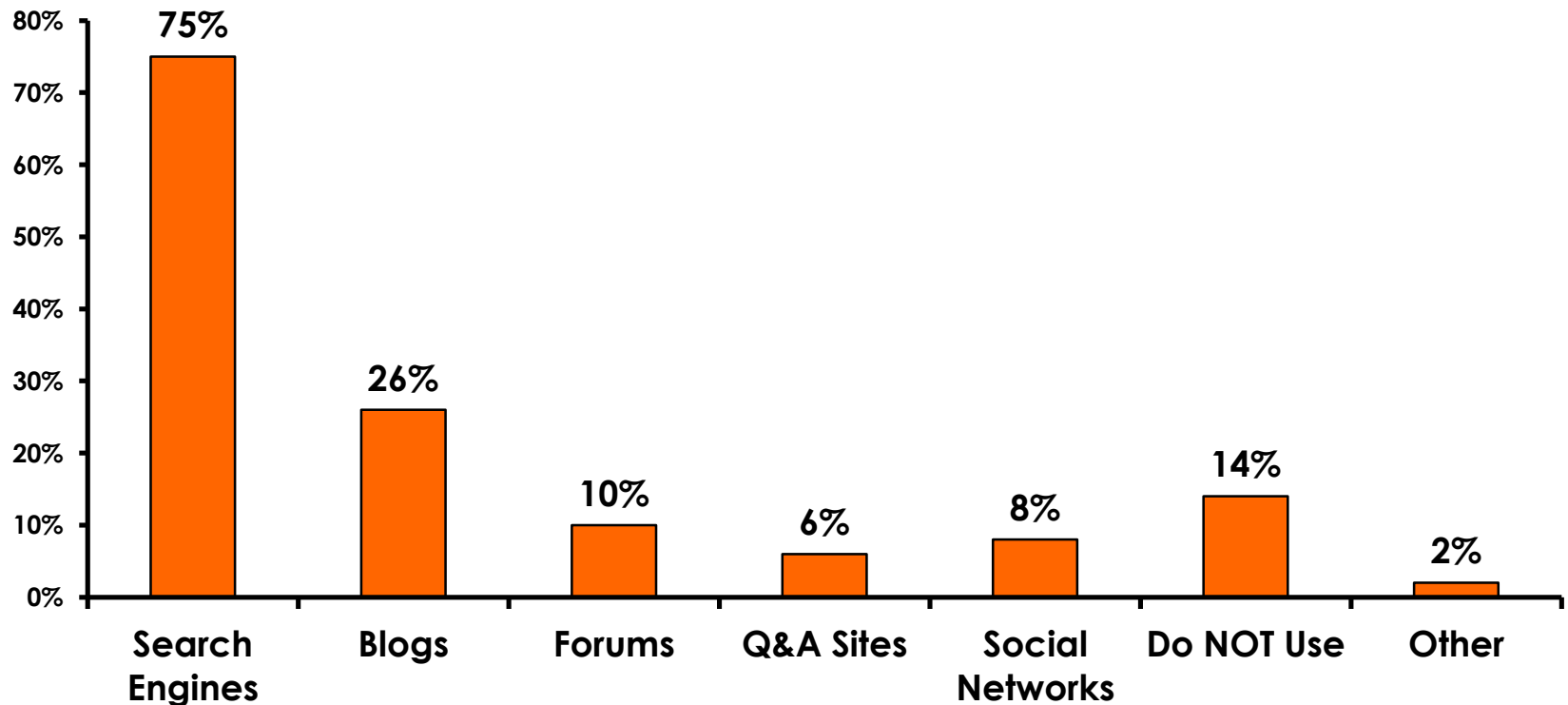
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



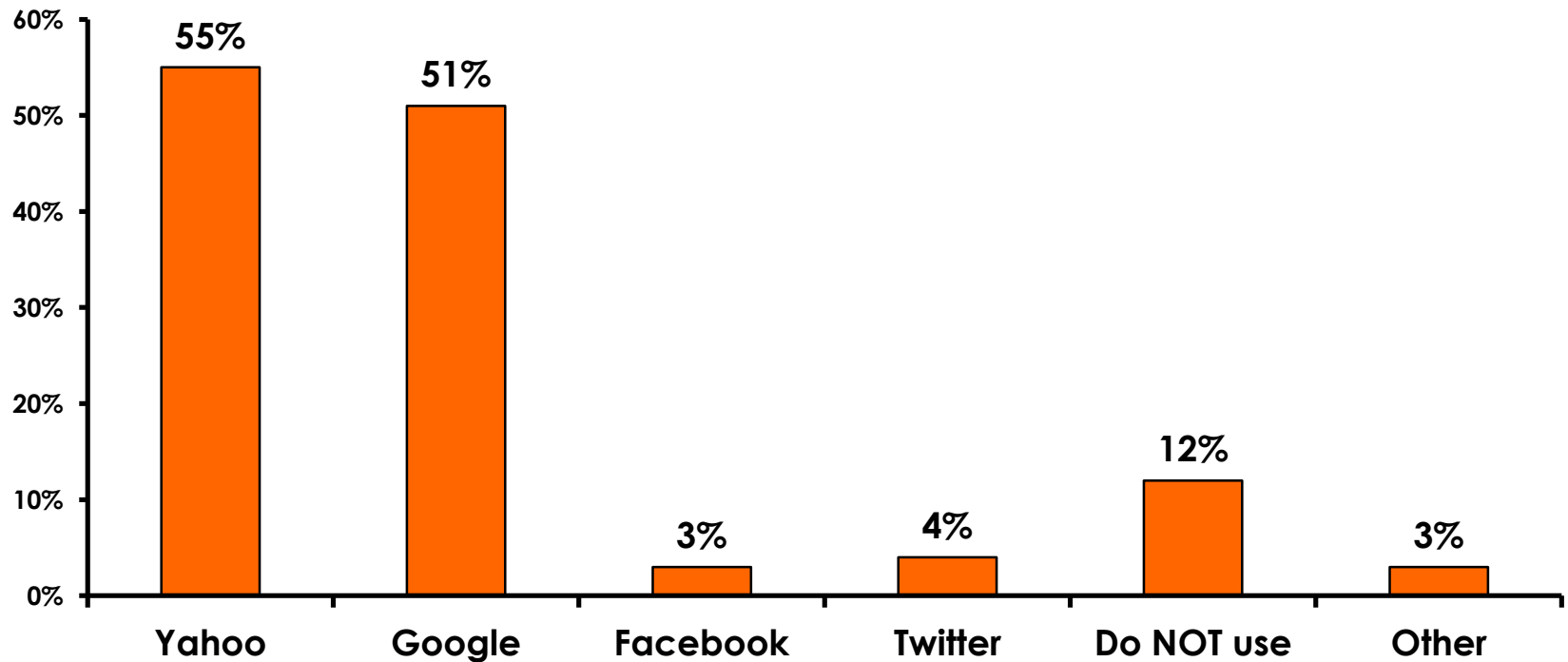
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

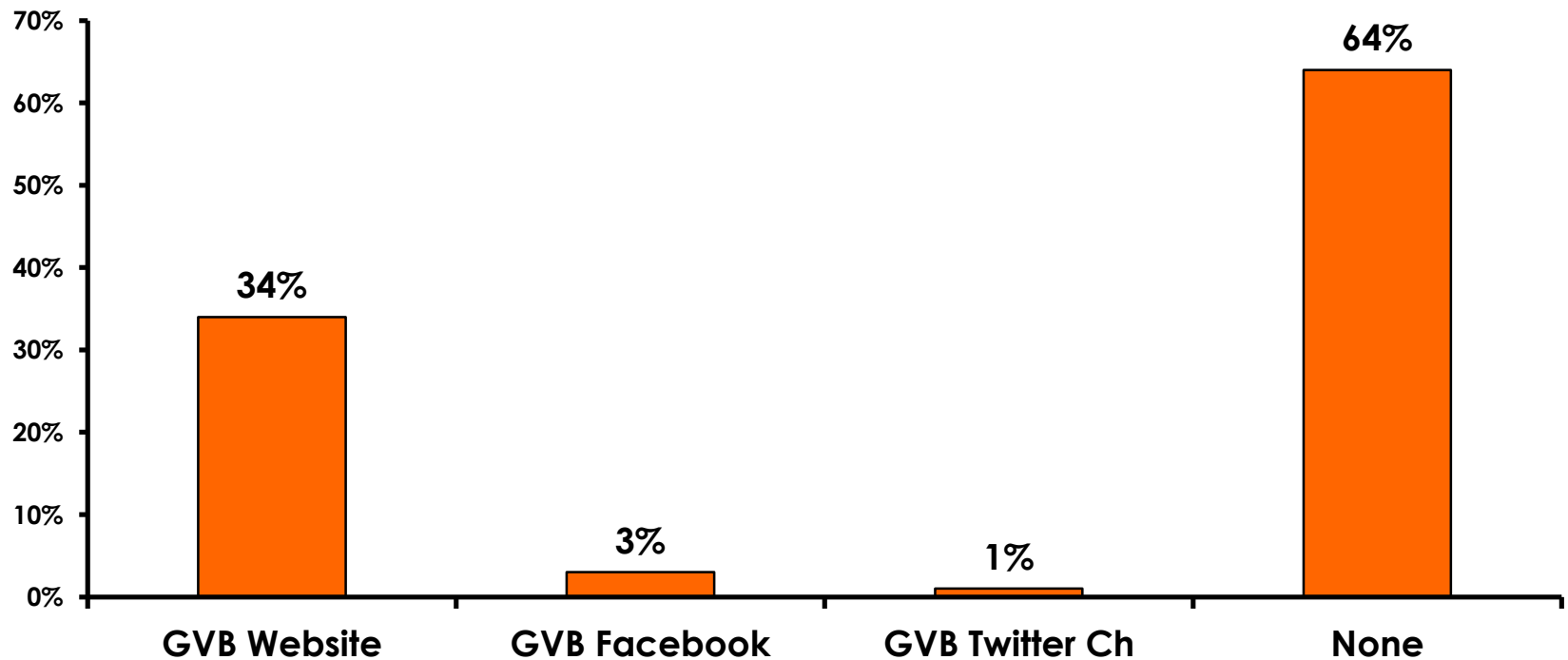


Internet- Things To Do

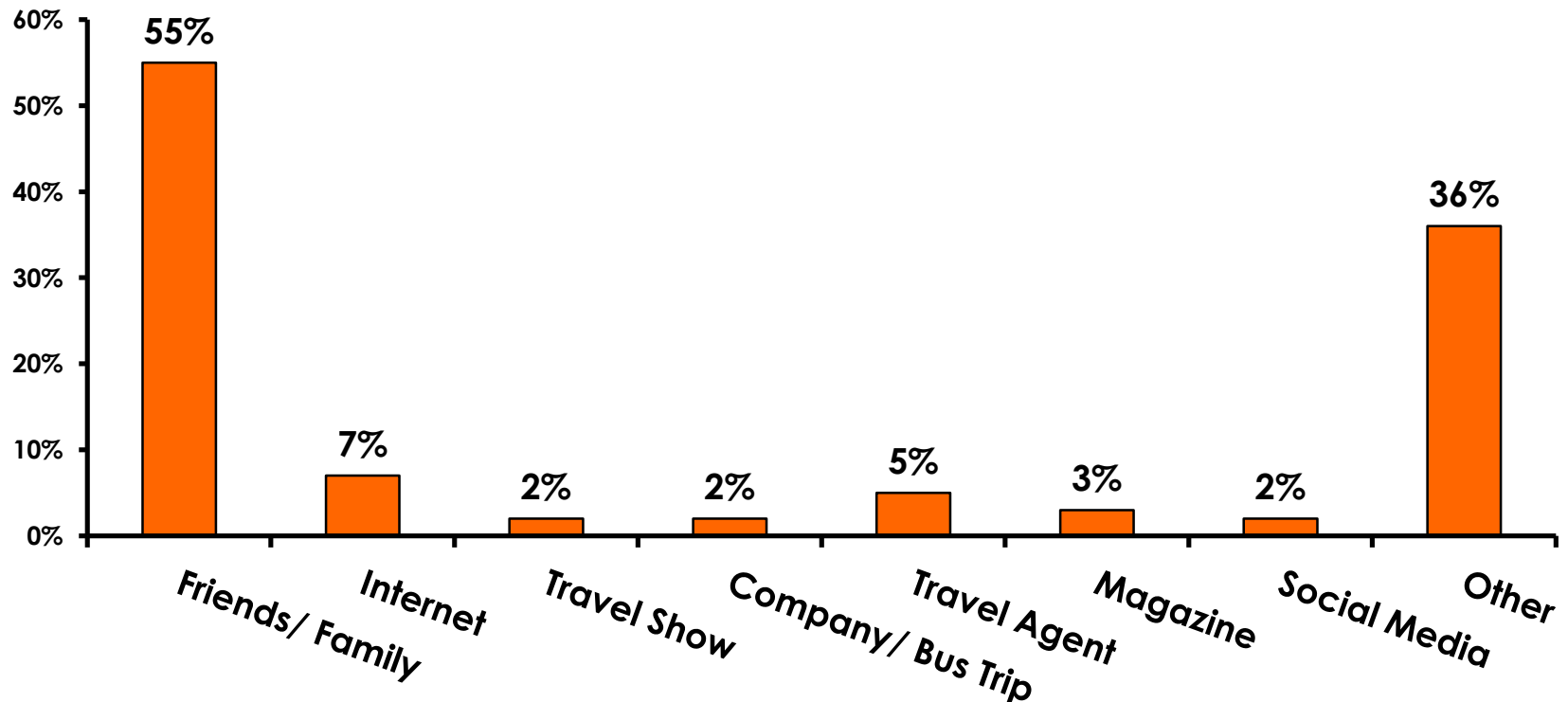
Sources of Info



Internet- GVB Sources

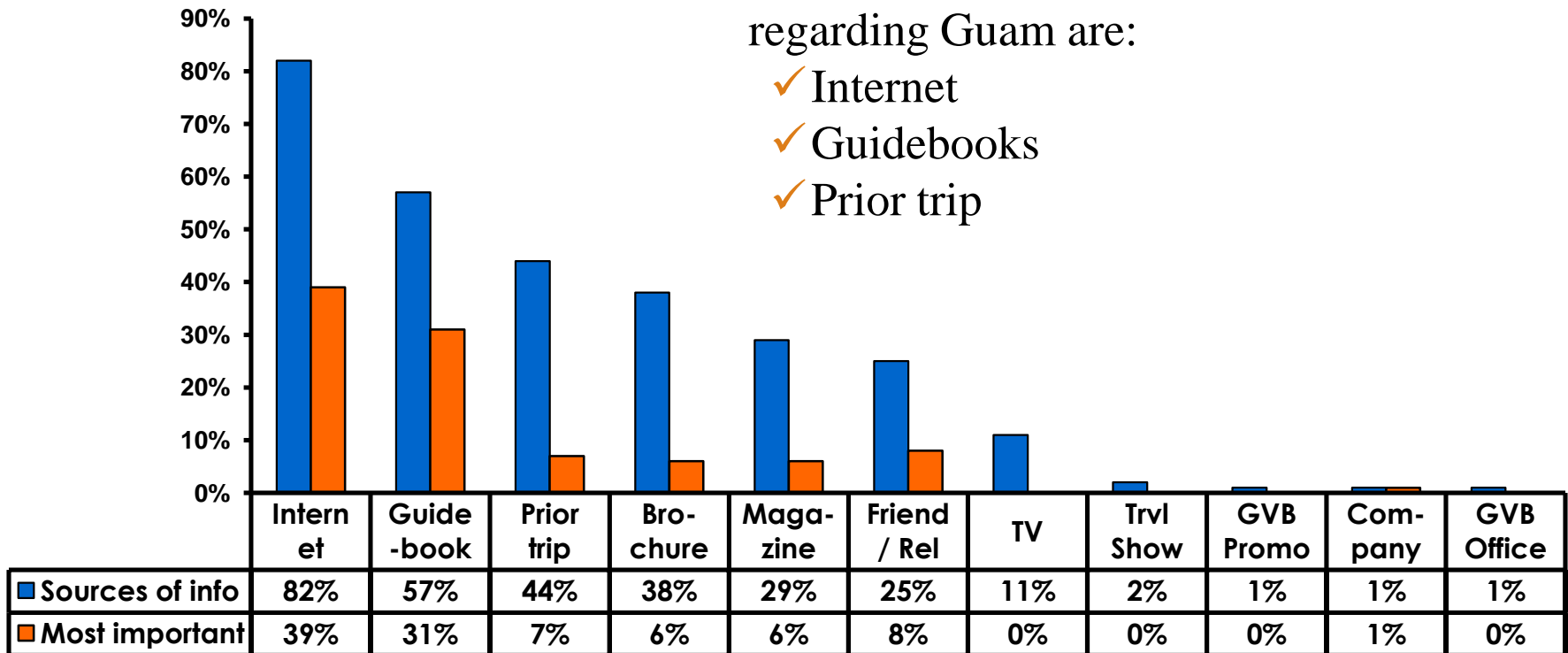


Travel Motivation- Info Sources



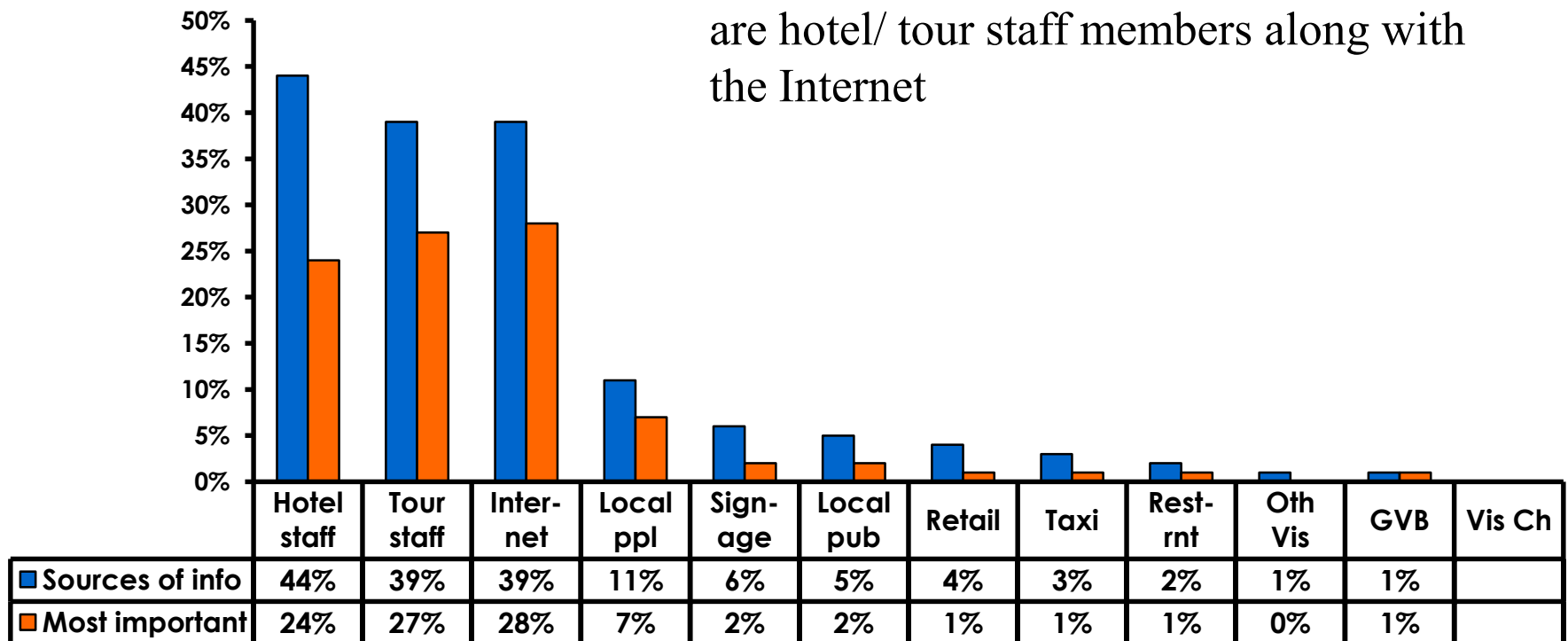
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

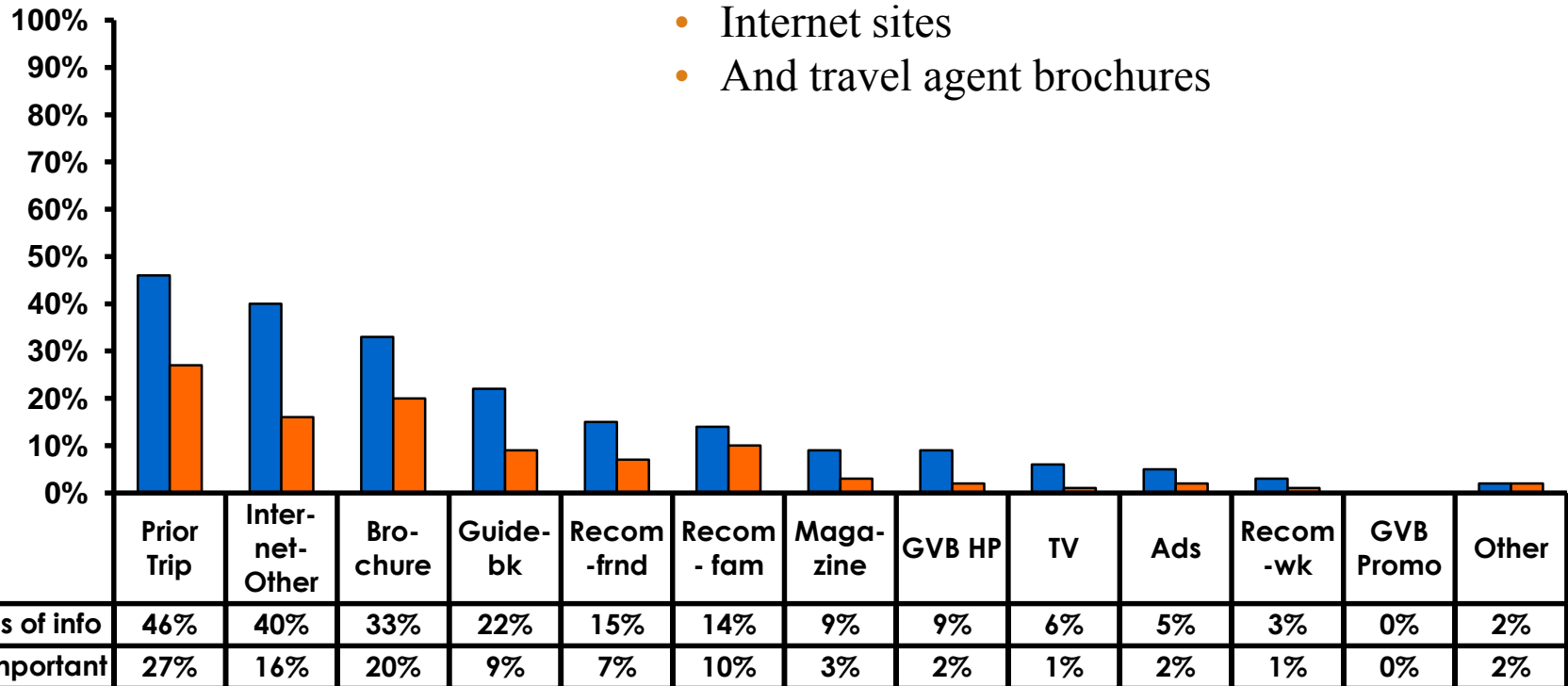
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

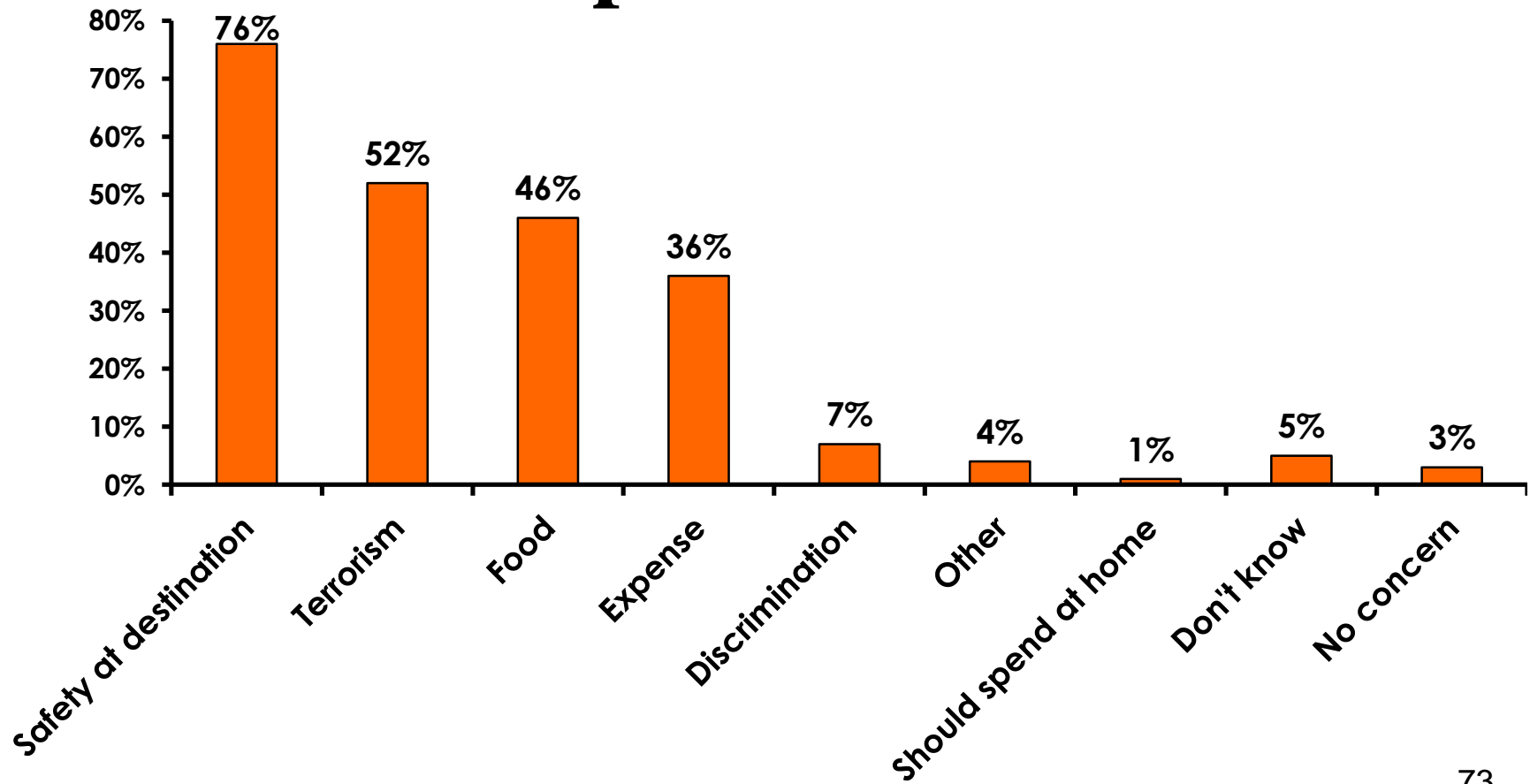
The primary motivational sources of information were.

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



SECTION 6 **OTHER ISSUES**

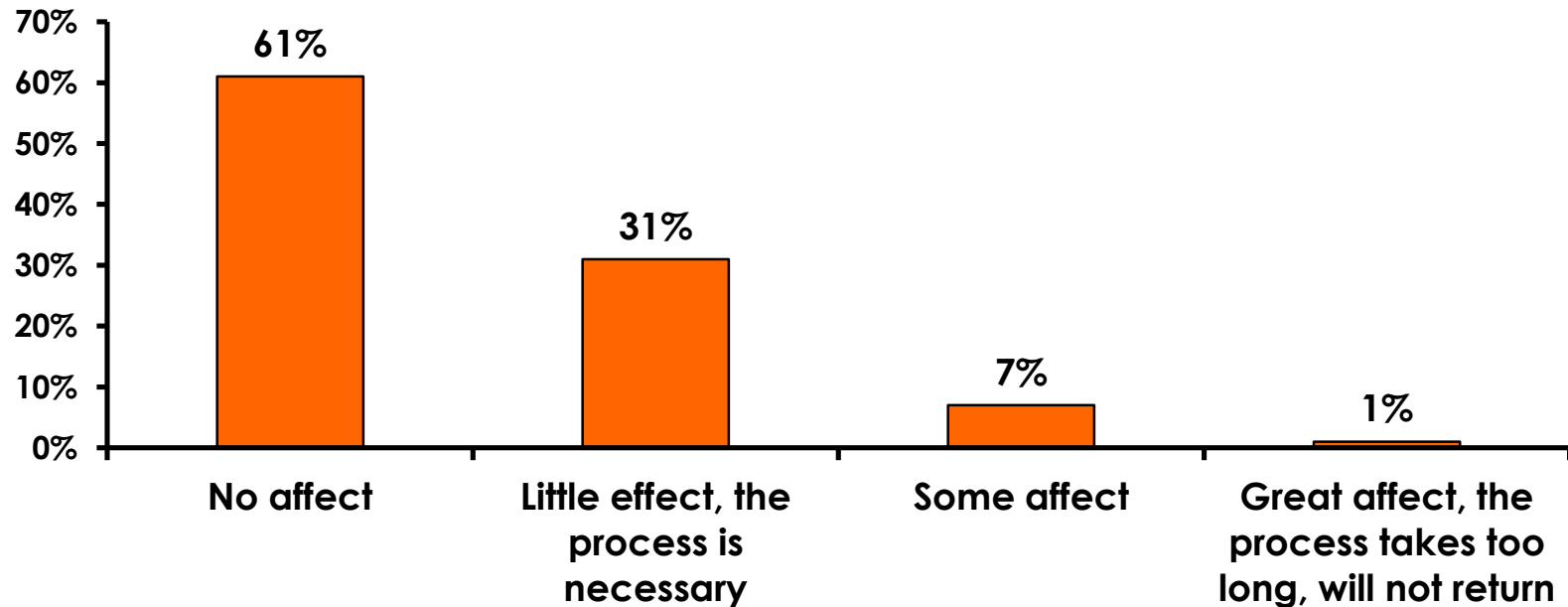
Concerns about travel outside of Japan - Overall



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	76%	70%	82%	77%	67%	83%	79%	73%	77%	84%	87%	70%	67%	
	Terrorism	52%	51%	59%	51%	42%	50%	42%	55%	58%	59%	48%	51%	33%	
	Food	46%	38%	53%	45%	42%	25%	42%	45%	55%	46%	54%	45%		
	Expense	36%	38%	37%	38%	29%	42%	32%	43%	45%	38%	48%	26%		
	Discrimination against Japanese	7%	8%	8%	5%	6%	17%	5%	8%	13%	5%	8%	6%		
	Don't know	5%	8%	4%	4%	4%		5%	5%			4%	1%	17%	
	Other	4%	3%	4%	4%	6%		5%		3%	5%	10%	5%		
	No concerns	3%	2%	3%	3%	8%			5%	6%		2%	9%		
	Should spend at home	1%	2%	1%	1%	2%			5%		2%	2%	1%		
	Total	Count	343	61	98	135	48	12	19	40	31	56	52	77	6

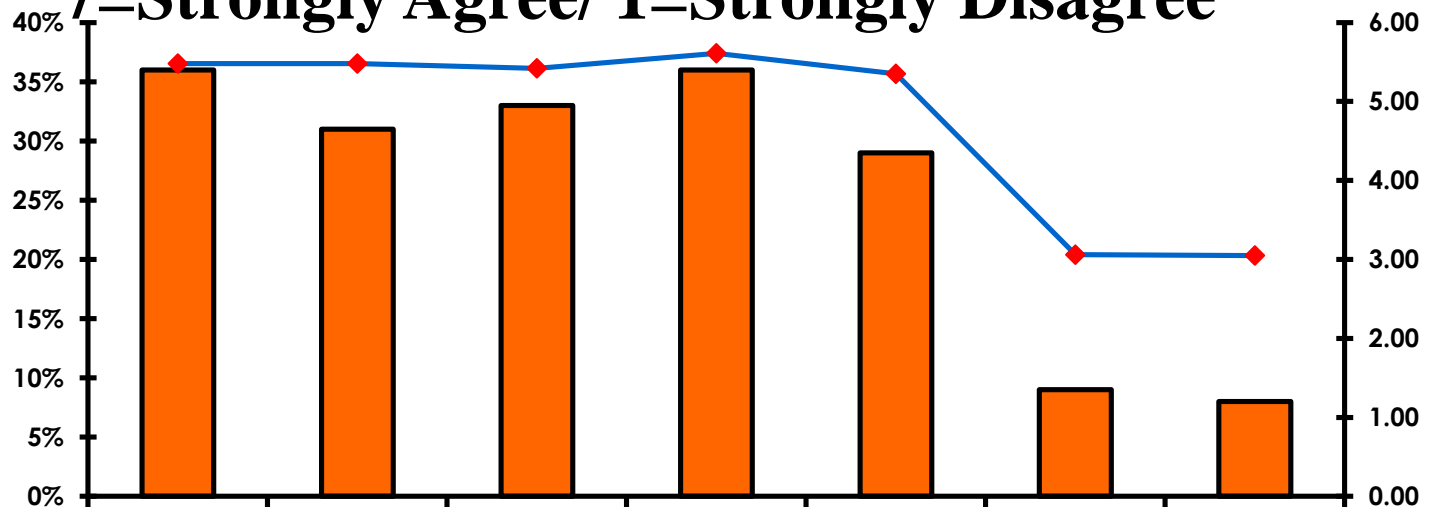
Security Screening/ Immigration Process at Guam International Airport





Airport Screening

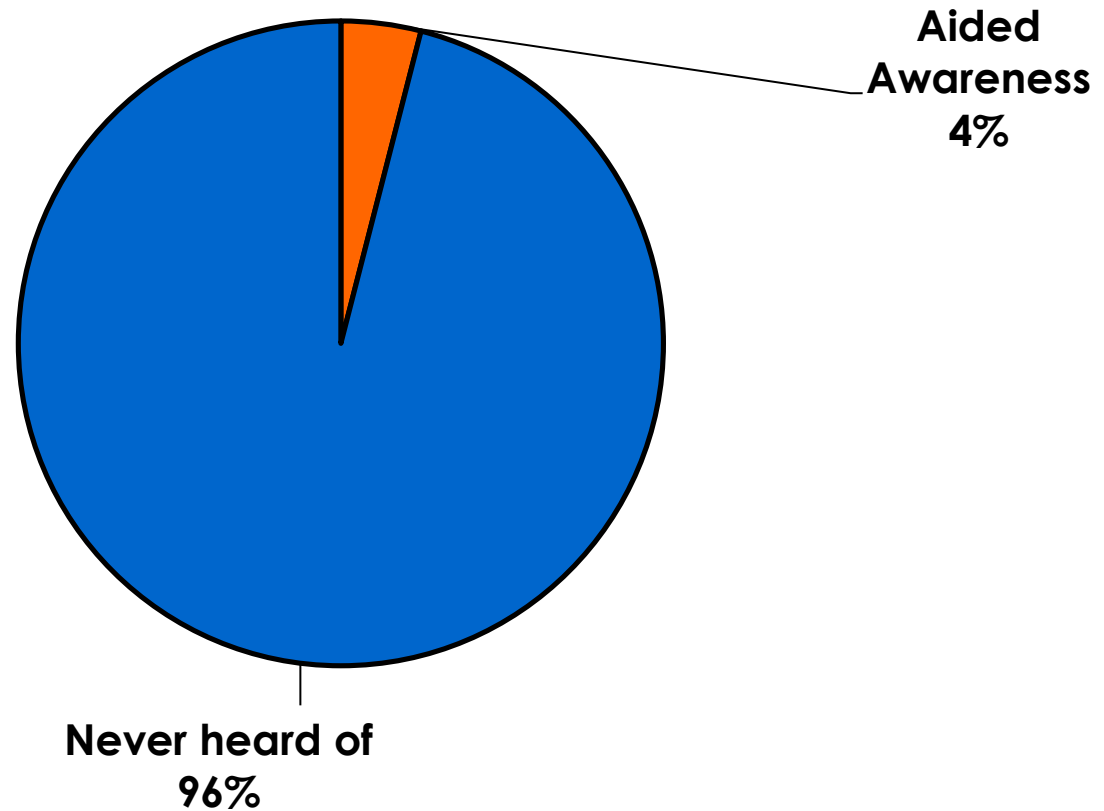
7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



	Time drop bags for screen reasonable	Signs bag screen reasonable	Time clear security enter secured area reasonable	Screening officer-good	Officer careful w/ belongings	Officer abused authority	Officer rude/unprof
 Strongly agree	36%	31%	33%	36%	29%	9%	8%
 MEAN	5.48	5.48	5.42	5.61	5.35	3.06	3.05

Shop Guam Festival



Shop Guam Festival - Impact

n=15

