



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

MARCH 2010



Prepared by: QMark Research

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Background & Methodology

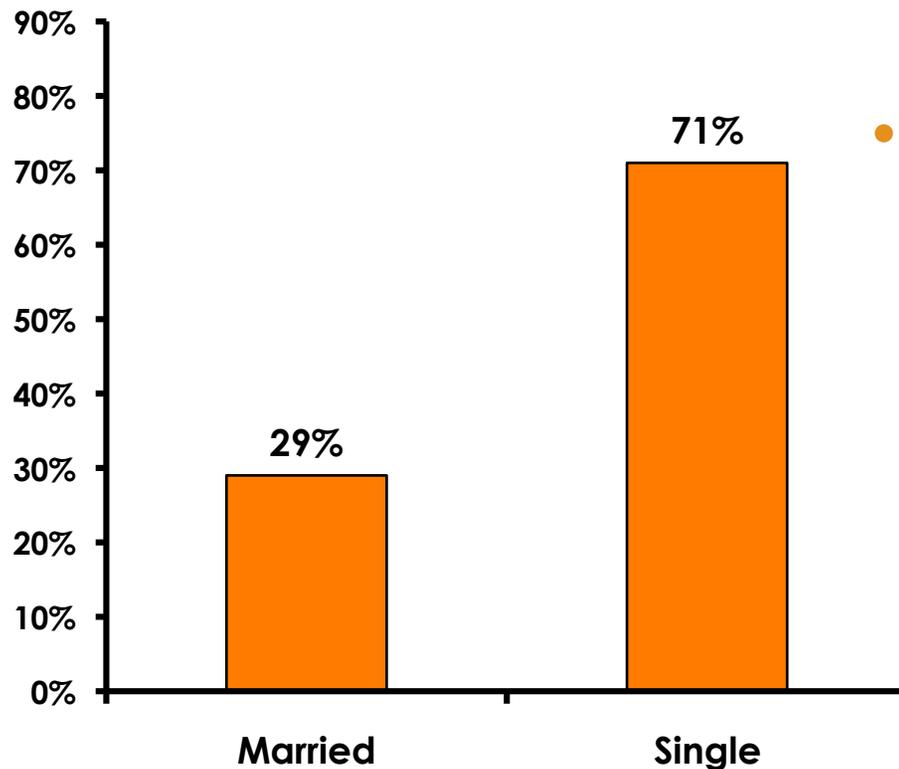
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **330** departing 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 **330** is +/- 5.4 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 +/- 5.4 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.

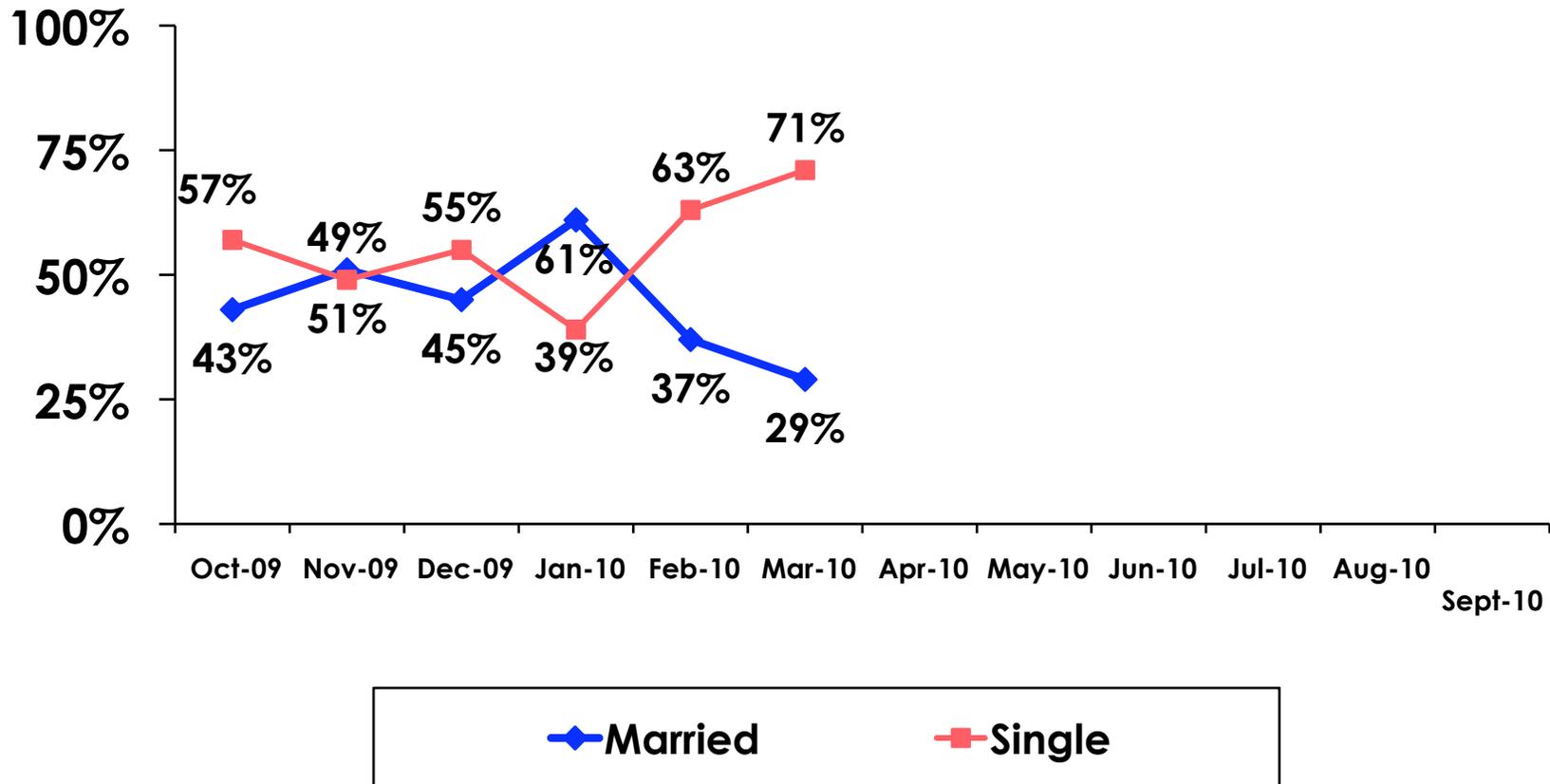
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

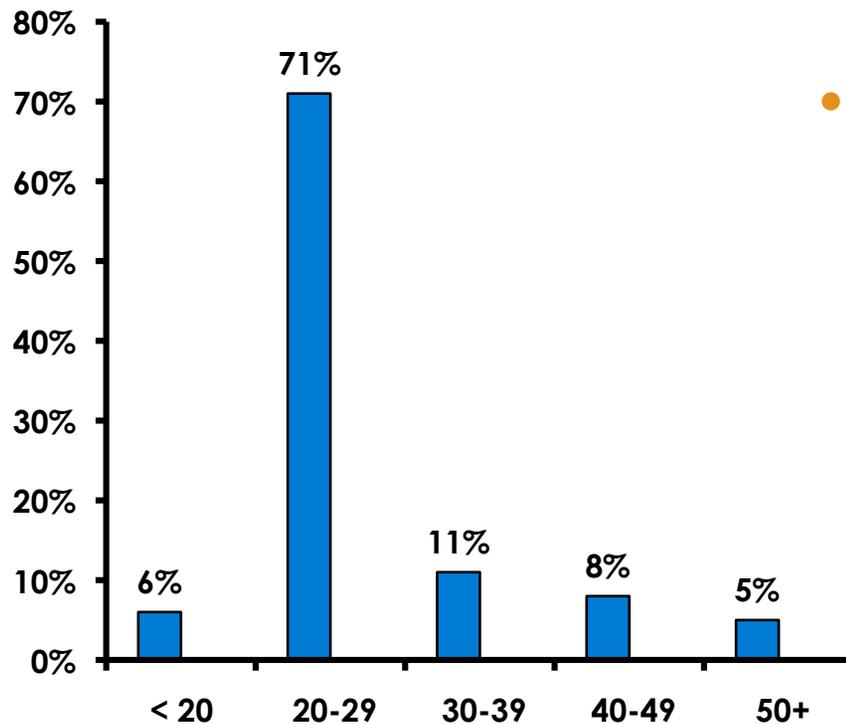


- 78% of 1st time visitors are single.

Marital Status

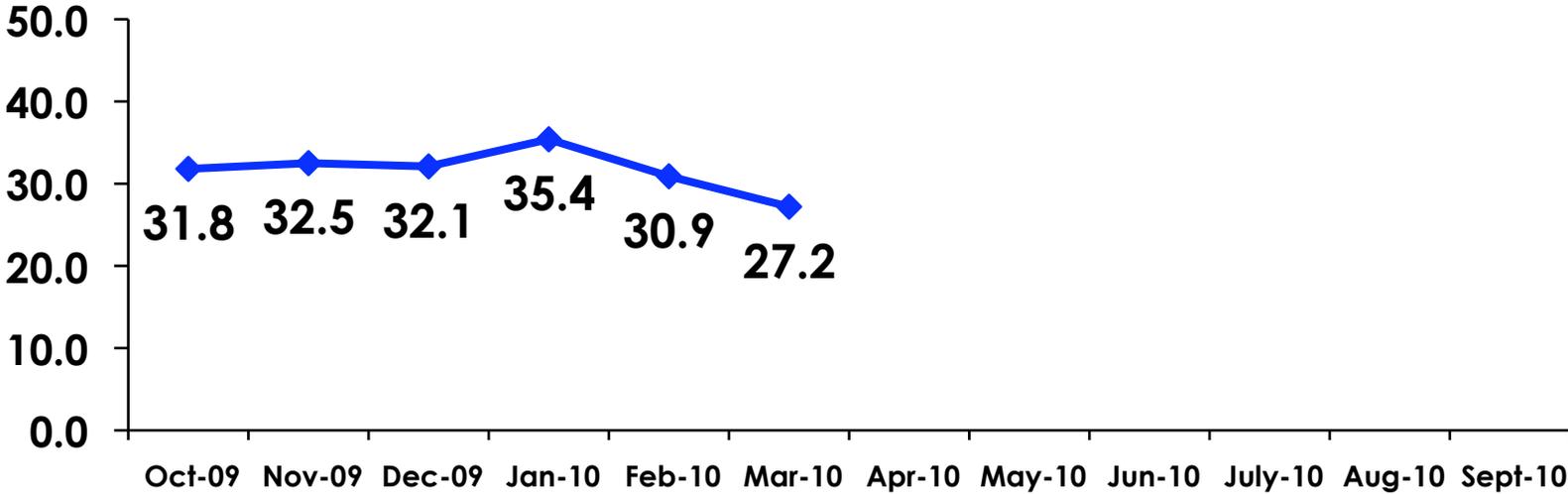


Age - Overall

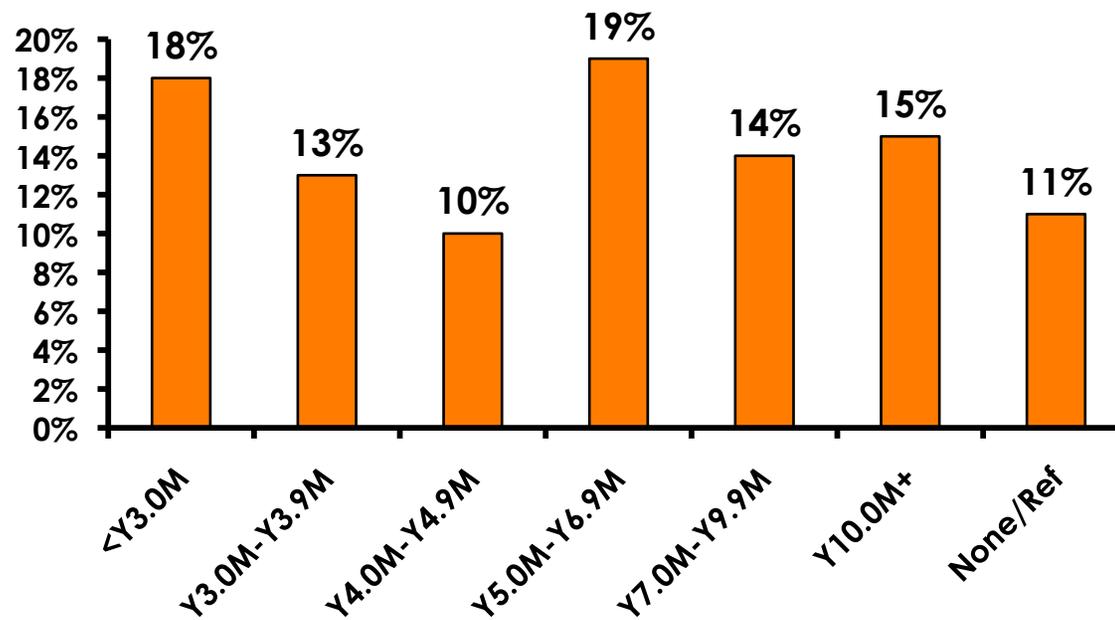


- The average age of the respondents is 27.2 years of age.

Average Age

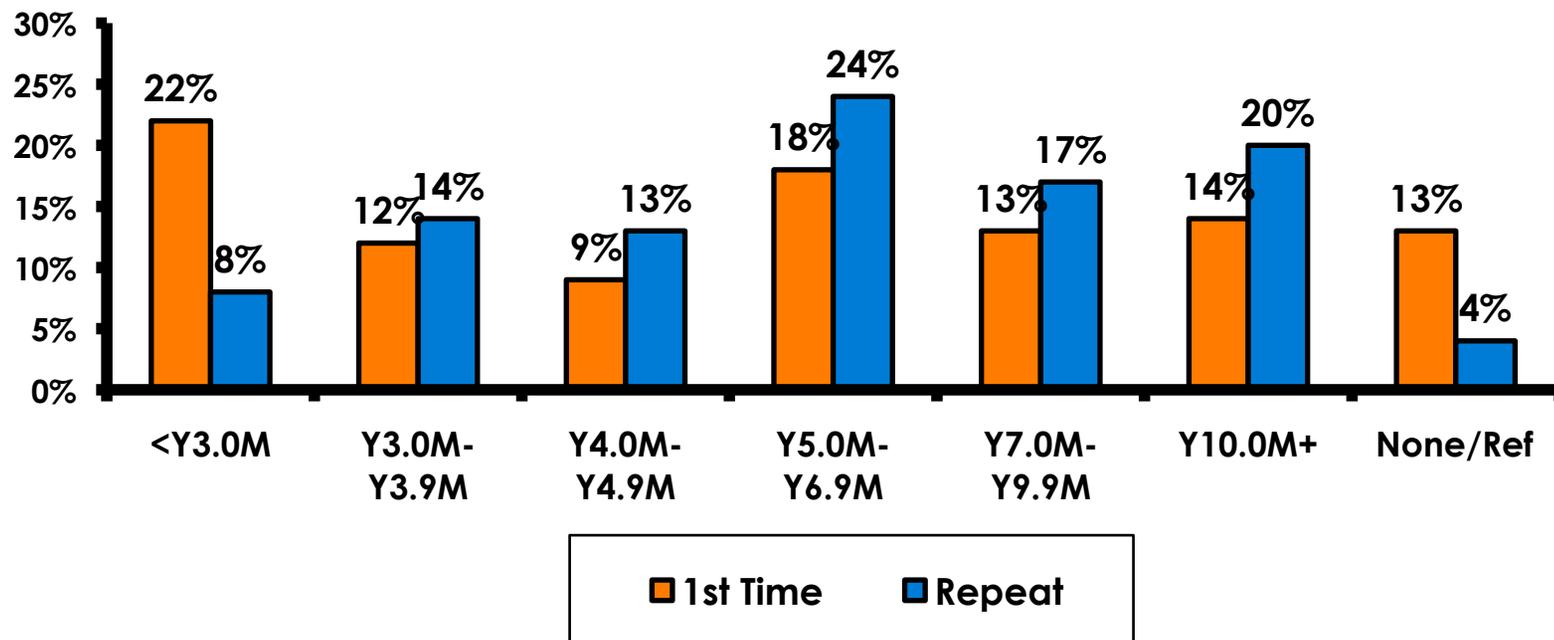


Personal Income



• ¥89.97=\$1

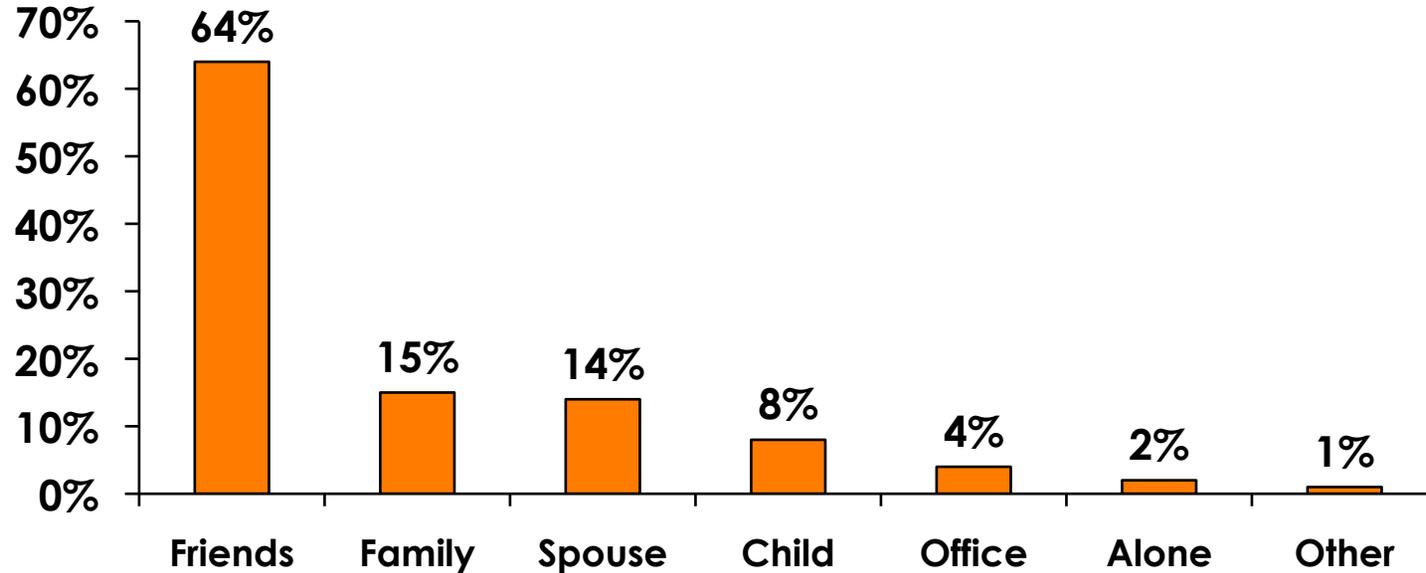
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

| | TOTAL | GENDER | | AGE | | | | | |
|------------------------|-------|--------|--------|-----|-------|-------|-------|-----|-----|
| | | Male | Female | <20 | 20-29 | 30-39 | 40-49 | 50+ | |
| PERSONAL INCOME <Y3.0M | Count | 49 | 25 | 24 | 2 | 43 | 3 | | 1 |
| | | 18% | 17% | 19% | 14% | 23% | 9% | | 6% |
| Y3.0M-Y3.9M | Count | 35 | 15 | 20 | 1 | 27 | 3 | 2 | 2 |
| | | 13% | 10% | 16% | 7% | 14% | 9% | 8% | 13% |
| Y4.0M-Y4.9M | Count | 27 | 15 | 12 | | 20 | 5 | 1 | 1 |
| | | 10% | 10% | 10% | | 11% | 16% | 4% | 6% |
| Y5.0M-Y6.9M | Count | 53 | 30 | 23 | | 29 | 12 | 8 | 4 |
| | | 19% | 20% | 18% | | 16% | 38% | 33% | 25% |
| Y7.0M-Y9.9M | Count | 38 | 25 | 13 | 4 | 19 | 2 | 8 | 5 |
| | | 14% | 17% | 10% | 29% | 10% | 6% | 33% | 31% |
| Y10.0M+ | Count | 42 | 21 | 21 | 2 | 25 | 7 | 5 | 3 |
| | | 15% | 14% | 17% | 14% | 13% | 22% | 21% | 19% |
| No Inc | Count | 29 | 17 | 12 | 5 | 24 | | | |
| | | 11% | 11% | 10% | 36% | 13% | | | |
| Total | Count | 273 | 148 | 125 | 14 | 187 | 32 | 24 | 16 |

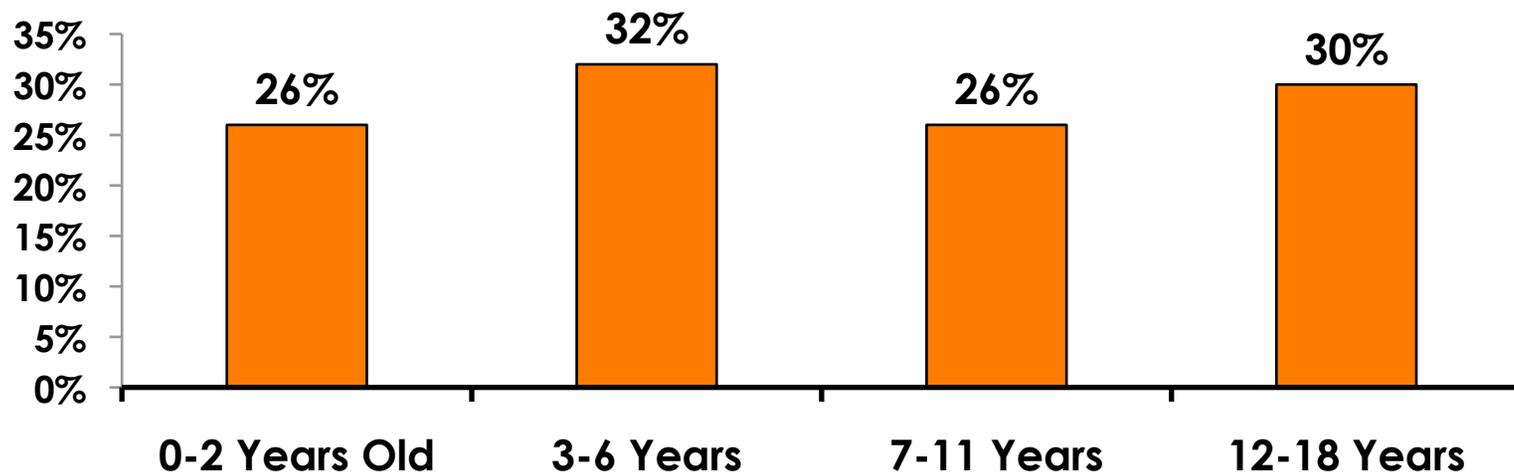
Travel Companions



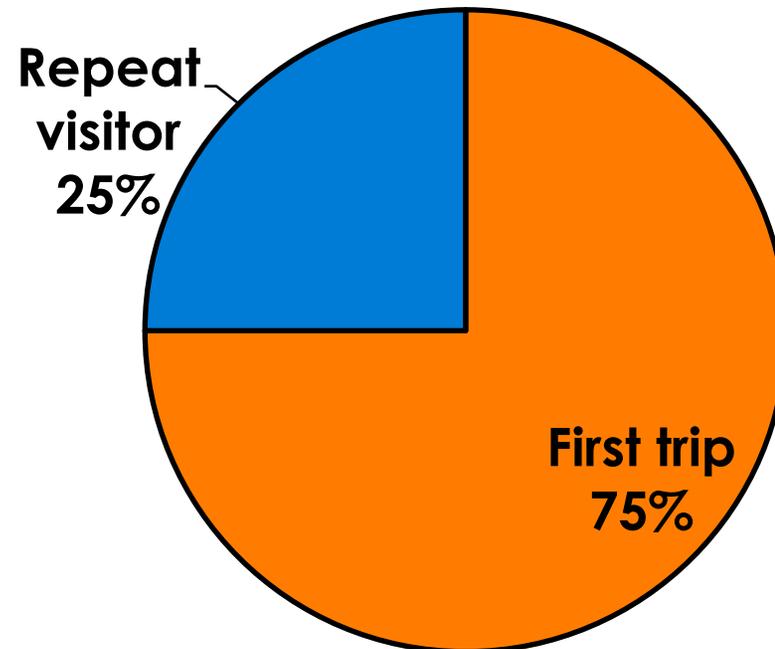
Number of Children Travel Party

N=27 total respondents traveling with children.

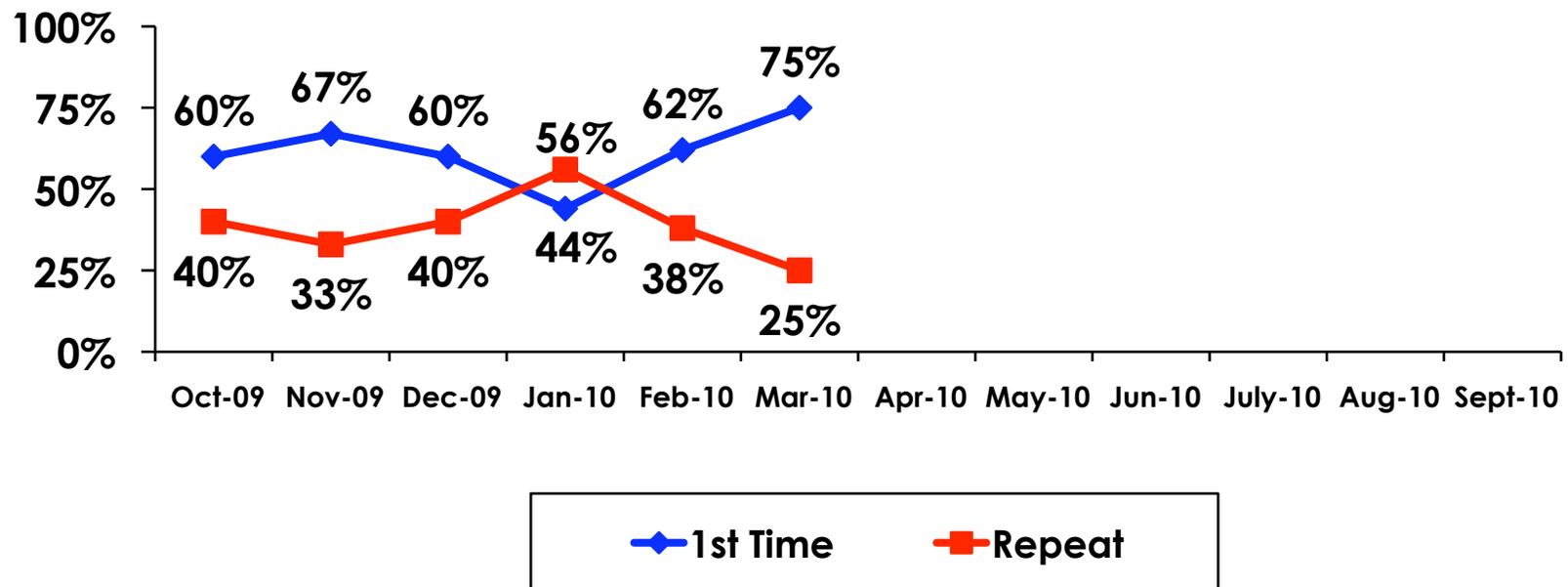
(Of those N=27 respondents, there is a total of 37 children 18 years or younger)



Prior Trips to Guam



Prior Trips To Guam



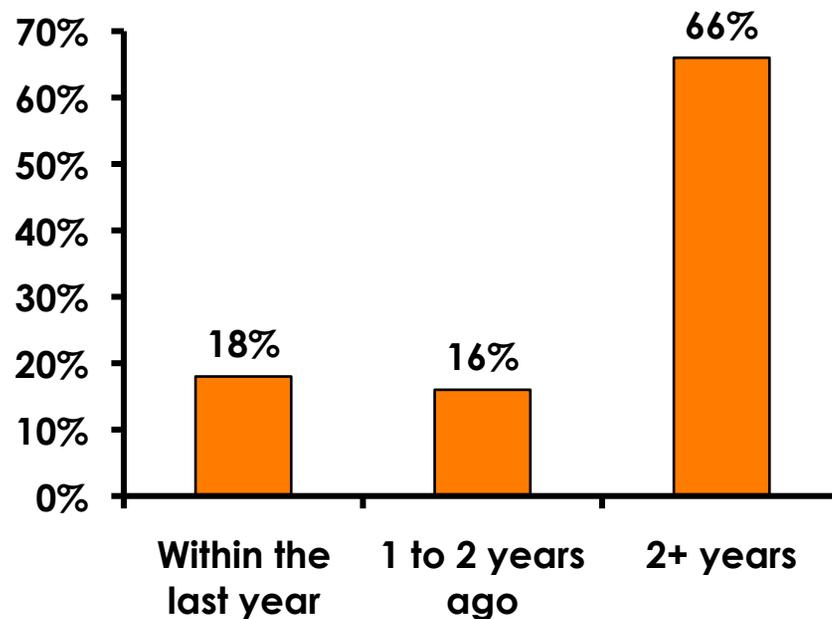
Trips to Guam by Age & Gender

| | | | TOTAL | TRIPS TO GUAM | |
|--------|--------|-------|-------|---------------|--------|
| | | | | 1st | Repeat |
| GENDER | Male | Count | 168 | 126 | 42 |
| | | | 51% | 51% | 51% |
| | Female | Count | 162 | 121 | 41 |
| | | | 49% | 49% | 49% |
| Total | | Count | 330 | 247 | 83 |
| AGE | <20 | Count | 19 | 16 | 3 |
| | | | 6% | 6% | 4% |
| | 20-29 | Count | 233 | 197 | 36 |
| | | | 71% | 80% | 43% |
| | 30-39 | Count | 35 | 16 | 19 |
| | | | 11% | 6% | 23% |
| | 40-49 | Count | 26 | 12 | 14 |
| | | 8% | 5% | 17% | |
| | 50+ | Count | 17 | 6 | 11 |
| | | | 5% | 2% | 13% |
| Total | | Count | 330 | 247 | 83 |

- First-time visitors tend to be younger than repeat visitors to Guam.

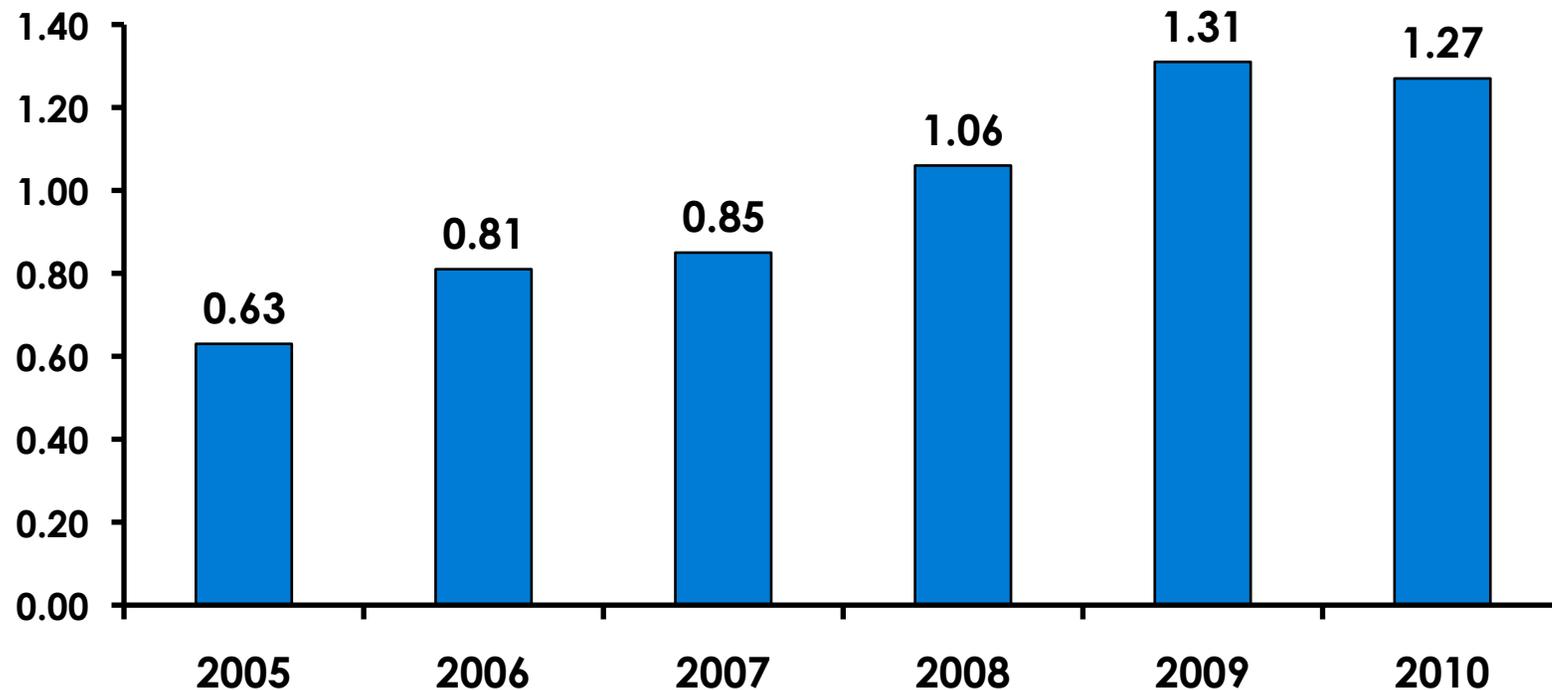
Repeat Visitors Last Trip

n = 83

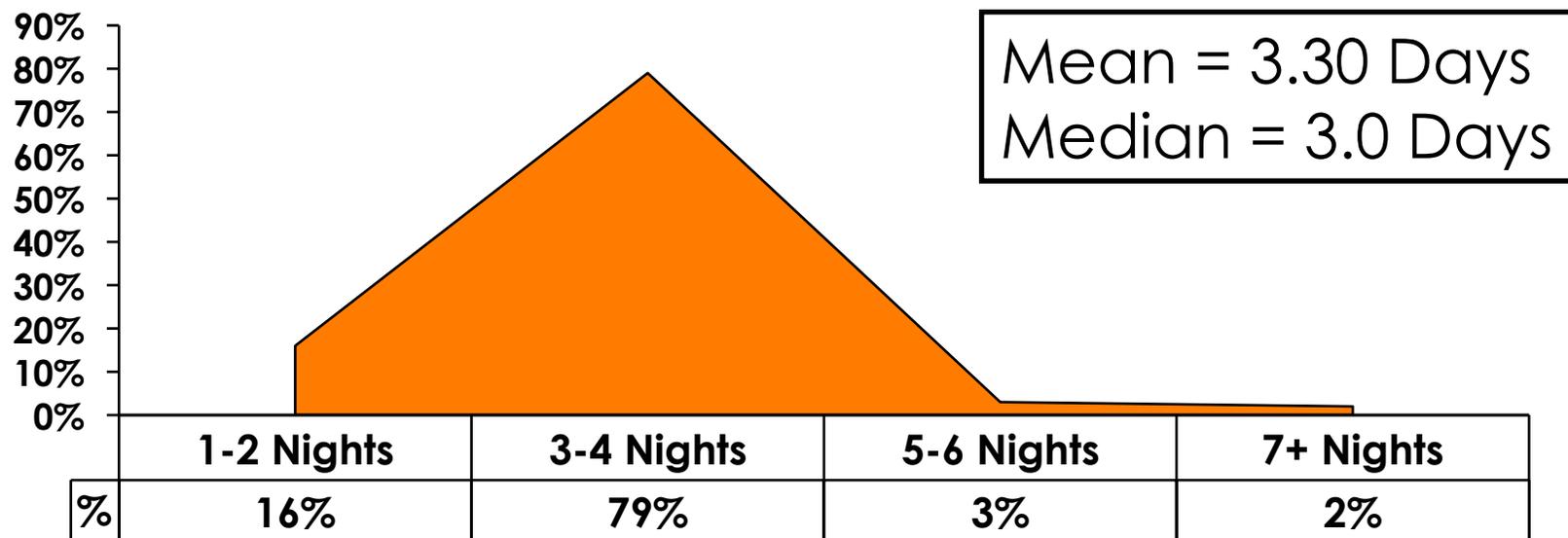


- The average repeat visitor has been to Guam 1.8 times.
- A third of the repeat visitors have been to Guam within the last 2 years.

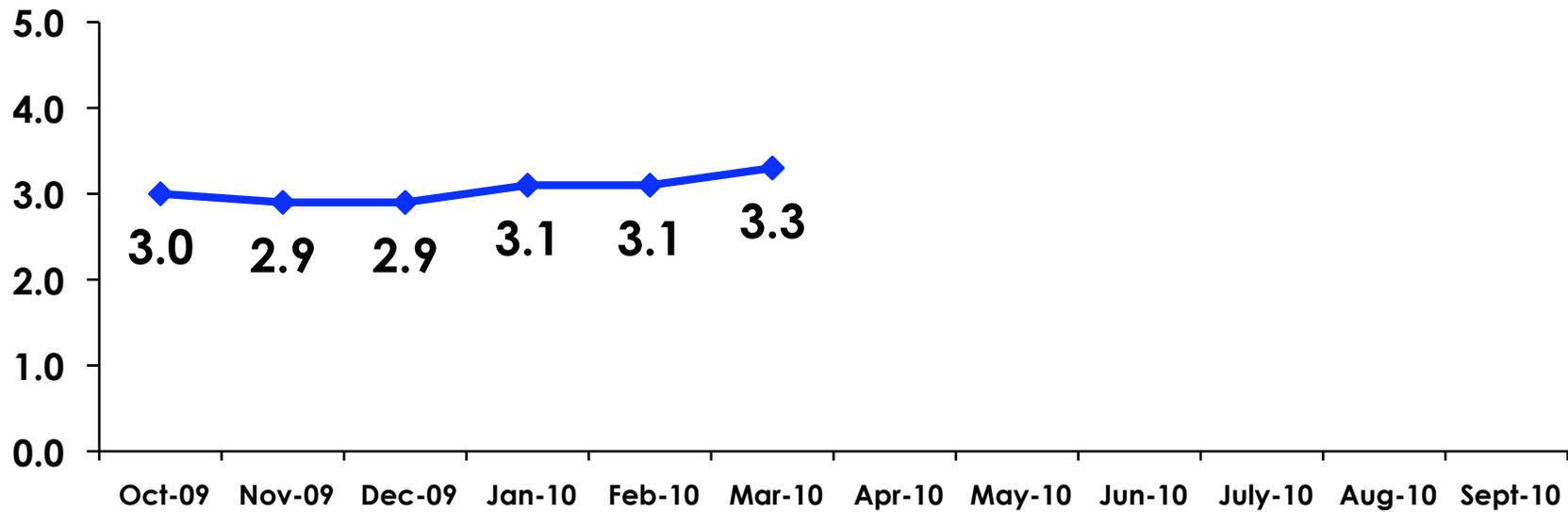
Average Number Overnight Trips (2004-2010) (2 nights or more)



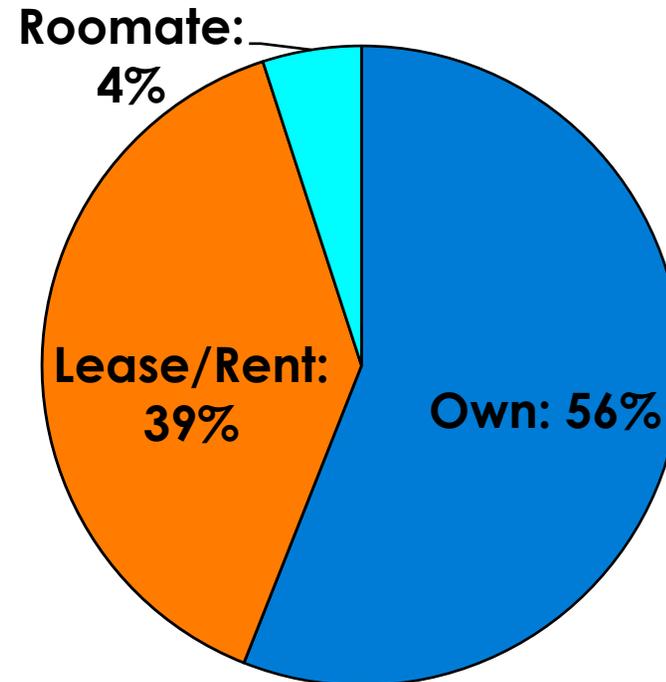
Length of Stay



Average Length Of Stay



Living Accommodations

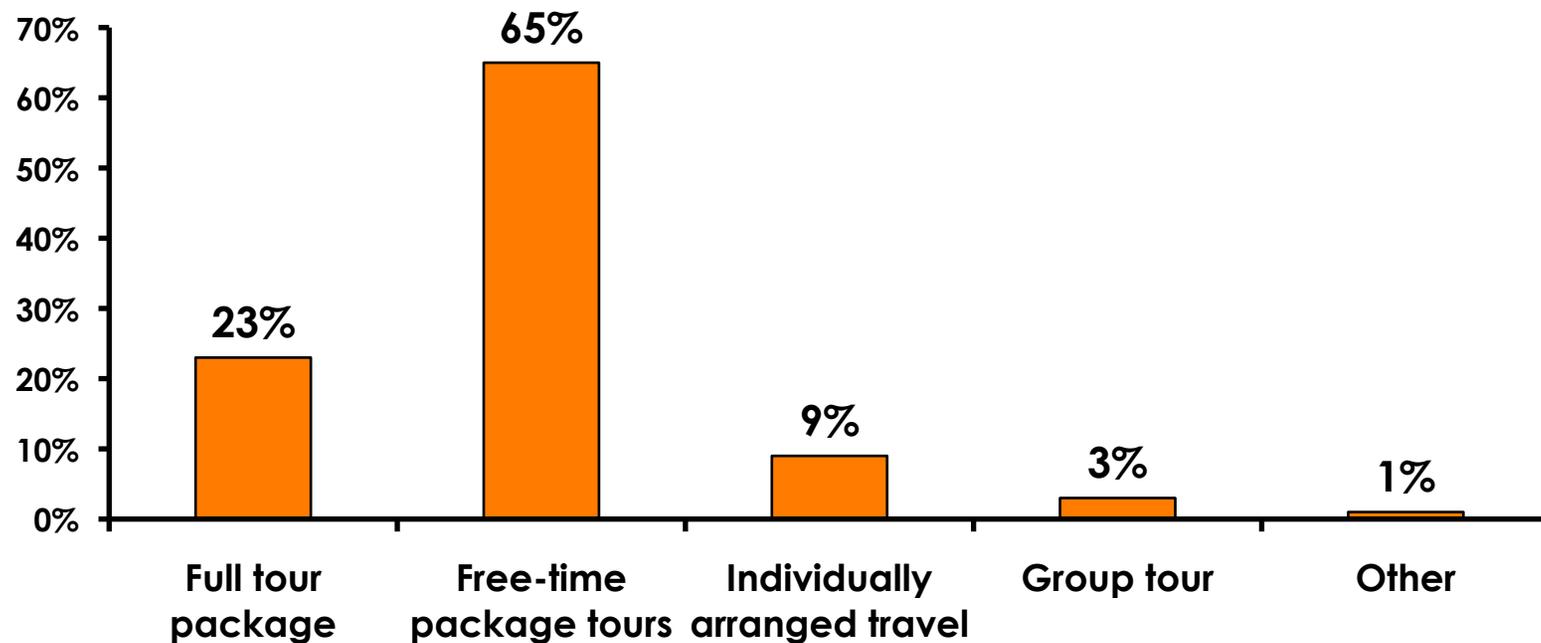


Occupation by Income

| | | TOTAL | PERSONAL INCOME | | | | | | No Inc |
|-------|---|-------|-----------------|-------------|-------------|-------------|-------------|---------|--------|
| | | | <Y3.0M | Y3.0M-Y3.9M | Y4.0M-Y4.9M | Y5.0M-Y6.9M | Y7.0M-Y9.9M | Y10.0M+ | |
| Q.29 | Student | 54% | 50% | 21% | 30% | 35% | 46% | 57% | 97% |
| | Co. Employee: Engineer | 9% | 8% | 18% | 11% | 16% | 14% | 5% | |
| | Co. Employee: Salesperson | 8% | 8% | 18% | 15% | 10% | 11% | 2% | |
| | Co. Employee: Office Worker Non-Managerial | 7% | 4% | 3% | 19% | 14% | 5% | 10% | |
| | Homemaker | 5% | 2% | 9% | 7% | 6% | 8% | 5% | |
| | Co. Employee: Manager | 3% | 6% | | 4% | 6% | 8% | 2% | |
| | Government Employee: Office Worker Non-Managerial | 3% | 6% | 3% | 4% | 2% | | 5% | |
| | Skilled Worker | 3% | 4% | 12% | 4% | | | 2% | |
| | Other | 2% | 2% | 6% | 4% | 6% | | | |
| | Self Employed | 2% | 2% | 3% | | | 3% | 2% | |
| | Professional or Specialist | 1% | 2% | 6% | | | | 2% | |
| | Unemployed | 1% | 2% | | | 2% | | 2% | 3% |
| | Co. Employee: Executive | 1% | | 3% | 4% | | | 2% | |
| | Freeter | 1% | | | | 4% | | | |
| | Teacher | 1% | 2% | | | | | 2% | |
| | Free-lancer | 0% | | | | | 3% | | |
| | Retired | 0% | | | | | 3% | | |
| Total | Count | 319 | 48 | 34 | 27 | 51 | 37 | 42 | 29 |

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

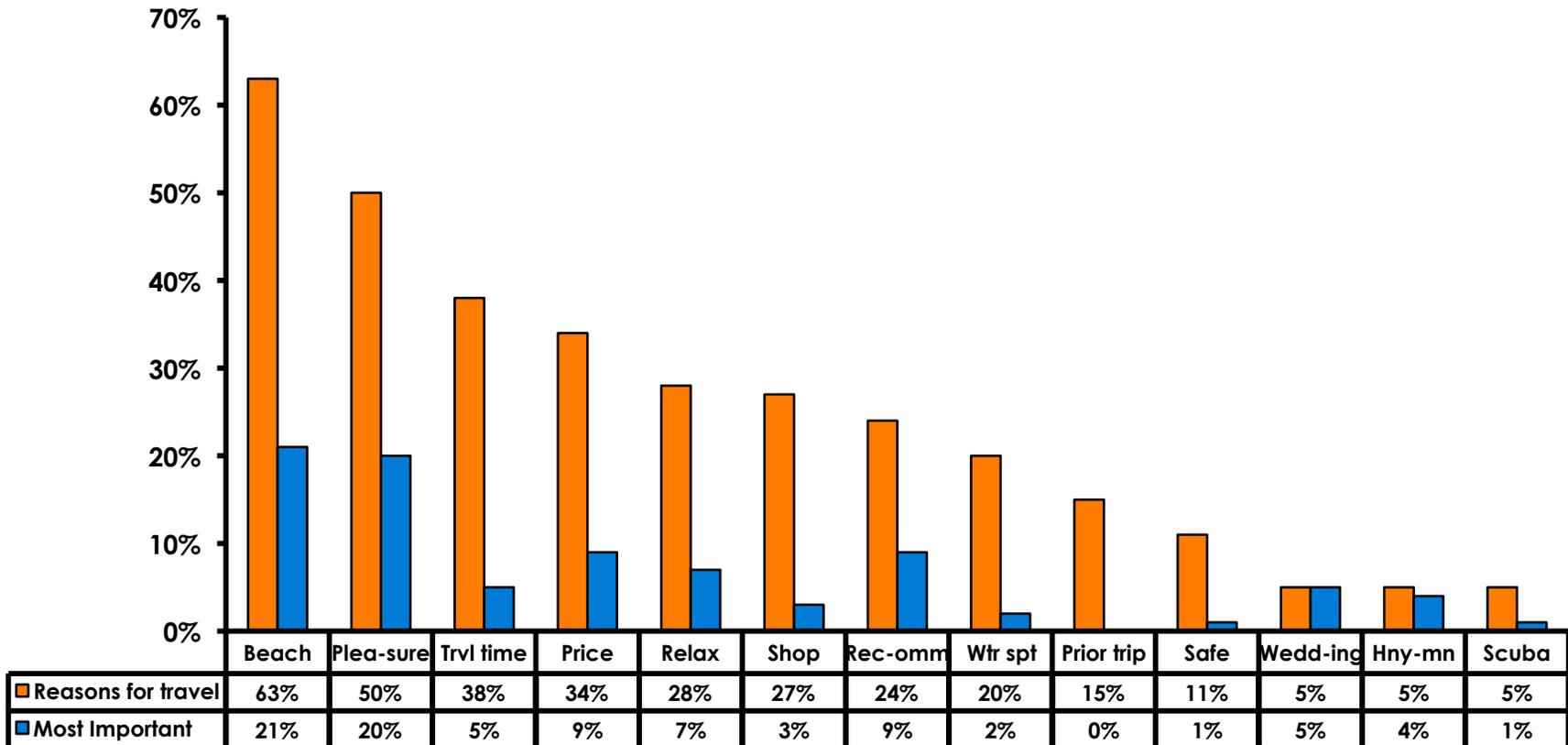


Accommodation by Income

Average length of stay: 3.30 days

| | TOTAL | PERSONAL INCOME | | | | | | | No Inc |
|----------------------------|-------|-----------------|-------------|-------------|-------------|-------------|---------|-----|--------|
| | | <Y3.0M | Y3.0M-Y3.9M | Y4.0M-Y4.9M | Y5.0M-Y6.9M | Y7.0M-Y9.9M | Y10.0M+ | | |
| Q.9 | | | | | | | | | |
| Japan Plaza Hotel | 12% | 12% | 6% | 7% | 11% | 5% | 12% | 17% | |
| Guam Reef Hotel | 9% | 6% | 14% | 15% | 15% | 5% | 7% | 7% | |
| Fiesta Resort Guam | 7% | 4% | 6% | 4% | 4% | 13% | 10% | 10% | |
| Holiday Resort Guam | 7% | 4% | 6% | | 11% | 8% | 7% | 10% | |
| Hotel Nikko Guam | 7% | 8% | 6% | 11% | 8% | 5% | 7% | 7% | |
| Ramada Suites Guam | 7% | 6% | | 11% | 4% | 8% | 7% | 3% | |
| Ohana Oceanview Hotel | 6% | 4% | 6% | | 9% | 3% | 5% | 10% | |
| Royal Orchid Guam | 5% | 4% | 11% | 11% | | 3% | 2% | 14% | |
| Leo Palace Resort | 5% | 8% | 3% | | 4% | 5% | 7% | 3% | |
| Sheraton Laguna Resort | 4% | 2% | 3% | 7% | 4% | 5% | 5% | 3% | |
| Outrigger Guam Resort | 3% | 4% | 6% | 4% | 2% | 5% | 5% | | |
| Onward Beach Resort | 3% | 6% | 3% | | 6% | 3% | 2% | 3% | |
| Hyatt Regency Guam | 3% | 8% | 6% | | | 3% | 7% | | |
| Grand Plaza Hotel | 3% | 4% | 3% | 4% | | 8% | 2% | 3% | |
| Pacific Bay Hotel | 3% | 2% | 3% | 4% | 4% | 5% | | 7% | |
| Ohana Bayview Hotel | 3% | 4% | 6% | 7% | | | 5% | | |
| Pacific Islands Club PIC | 3% | 2% | 3% | 4% | 4% | 5% | | | |
| Hilton Guam Resort & Spa | 2% | | 3% | 7% | 4% | 3% | 2% | | |
| Hotel Sane Fe | 2% | 4% | 3% | | 4% | | 5% | | |
| Guam Marriott Resort Hotel | 2% | 2% | | | 6% | | 2% | | |
| The Westin Resort Guam | 2% | 2% | 3% | | 2% | 8% | | | |
| Other | 1% | | 3% | 4% | | | | | |
| Tun on Bay Capital Hotel | 1% | 2% | | | | | | | |
| Total | Count | 330 | 49 | 35 | 27 | 53 | 38 | 42 | 29 |

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/beaches
- Pleasure and
- Price, Recommendations

*are the primary reasons for
visiting during this period.*

Motivation by Age & Gender

| | TOTAL | AGE | | | | | GENDER | |
|---|-------|-----|-------|-------|-------|-----|--------|--------|
| | | <20 | 20-29 | 30-39 | 40-49 | 50+ | Male | Female |
| Q.5 Beautiful seas, beaches, tropical climate | 63% | 68% | 64% | 63% | 58% | 47% | 61% | 65% |
| Pleasure | 50% | 68% | 53% | 26% | 50% | 41% | 46% | 54% |
| Short travel time | 38% | 26% | 35% | 43% | 62% | 47% | 38% | 39% |
| Price of the tour package | 34% | 26% | 36% | 37% | 35% | 12% | 35% | 33% |
| Just to relax | 28% | 26% | 25% | 29% | 54% | 24% | 25% | 31% |
| Shopping | 27% | 53% | 26% | 14% | 38% | 24% | 19% | 35% |
| Recommendation of friend, relative, travel agency | 24% | 21% | 27% | 6% | 15% | 29% | 27% | 20% |
| Water sports | 20% | 16% | 23% | 20% | 4% | 6% | 18% | 22% |
| A previous visit | 15% | 11% | 9% | 29% | 38% | 35% | 15% | 15% |
| It is a safe place to spend a vacation | 11% | | 9% | 14% | 23% | 24% | 8% | 14% |
| Other | 9% | 5% | 10% | 9% | 4% | 6% | 8% | 10% |
| To get married or Attend wedding | 5% | | 5% | 11% | 4% | 6% | 5% | 6% |
| Honeymoon | 5% | | 6% | 6% | 4% | | 10% | 1% |
| SCUBA diving | 5% | | 6% | 3% | 4% | | 5% | 5% |
| To golf | 3% | | 1% | 9% | 4% | 12% | 3% | 2% |
| To visit friends or relatives | 2% | 5% | 2% | 3% | 4% | | 2% | 2% |
| Company or Business trip | 2% | | 1% | 3% | 4% | 12% | 4% | 1% |
| My company sponsored me | 1% | | 1% | | 4% | | 2% | 1% |
| Special promotion | 1% | | 1% | | | | 1% | 1% |
| Organized Sporting Activity | 1% | | 0% | | 4% | | 1% | 1% |
| Convention, Conference, Trade show | 0% | | 0% | | | | 1% | |
| Promotional materials from GVB | 0% | | 0% | | | | 1% | |
| Career certification or testing | 0% | | | | 4% | | | 1% |
| Total Cases | 329 | 19 | 232 | 35 | 26 | 17 | 168 | 161 |

Motivation by Income

| | TOTAL | PERSONAL INCOME | | | | | | |
|---|-------|-----------------|-------------|-------------|-------------|-------------|---------|--------|
| | | <Y3.0M | Y3.0M-Y3.9M | Y4.0M-Y4.9M | Y5.0M-Y6.9M | Y7.0M-Y9.9M | Y10.0M+ | No Inc |
| Q.5 Beautiful seas, beaches, tropical climate | 63% | 56% | 60% | 52% | 62% | 66% | 67% | 75% |
| Pleasure | 50% | 54% | 51% | 44% | 49% | 47% | 52% | 52% |
| Short travel time | 38% | 27% | 49% | 52% | 45% | 45% | 36% | 31% |
| Price of the tour package | 34% | 33% | 46% | 33% | 40% | 26% | 31% | 24% |
| Just to relax | 28% | 23% | 26% | 26% | 32% | 39% | 29% | 34% |
| Shopping | 27% | 33% | 17% | 15% | 25% | 21% | 33% | 31% |
| Recommendation of friend, relative, travel agency | 24% | 31% | 9% | 19% | 25% | 18% | 24% | 31% |
| Water sports | 20% | 15% | 23% | 22% | 23% | 16% | 26% | 10% |
| A previous visit | 15% | 6% | 14% | 26% | 25% | 18% | 19% | 7% |
| It is a safe place to spend a vacation | 11% | 10% | 11% | 4% | 8% | 16% | 21% | |
| Other | 9% | 8% | 9% | 15% | 11% | 5% | 10% | 7% |
| To get married or Attend wedding | 5% | 10% | 3% | 11% | 4% | 11% | 5% | |
| Honeymoon | 5% | 10% | 14% | 11% | 4% | 5% | | |
| SCUBA diving | 5% | | 3% | 4% | 6% | 8% | 14% | |
| To golf | 3% | 2% | 6% | 4% | 4% | | 5% | 3% |
| To visit friends or relatives | 2% | 4% | | | 4% | 5% | | |
| Company or Business trip | 2% | 4% | | 4% | 2% | | 5% | |
| My company sponsored me | 1% | 4% | 3% | | 2% | | | |
| Organized Sporting Activity | 1% | | 3% | | | | | |
| Convention, Conference, Trade show | 0% | | | | 2% | | | |
| Promotional materials from GVB | 0% | 2% | | | | | | |
| Special promotion | 1% | | | | | | | |
| Career certification or testing | 0% | | | | 2% | | | |
| Total Cases | 329 | 48 | 35 | 27 | 53 | 38 | 42 | 29 |

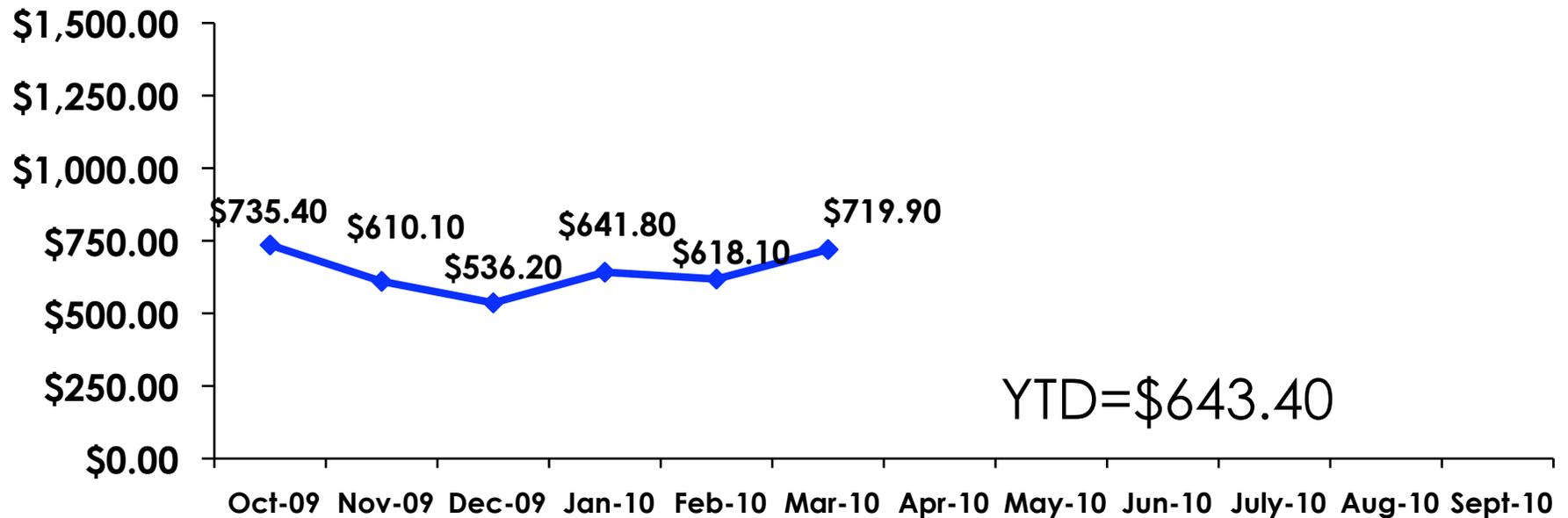
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥89.97/US\$1

- \$1,276.60 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$11,559 = maximum (highest amount recorded for the entire sample)
- \$719.90 = overall mean average per person prepaid expenditures

Prepaid Expenditures



Breakdown of Prepaid Expenditures

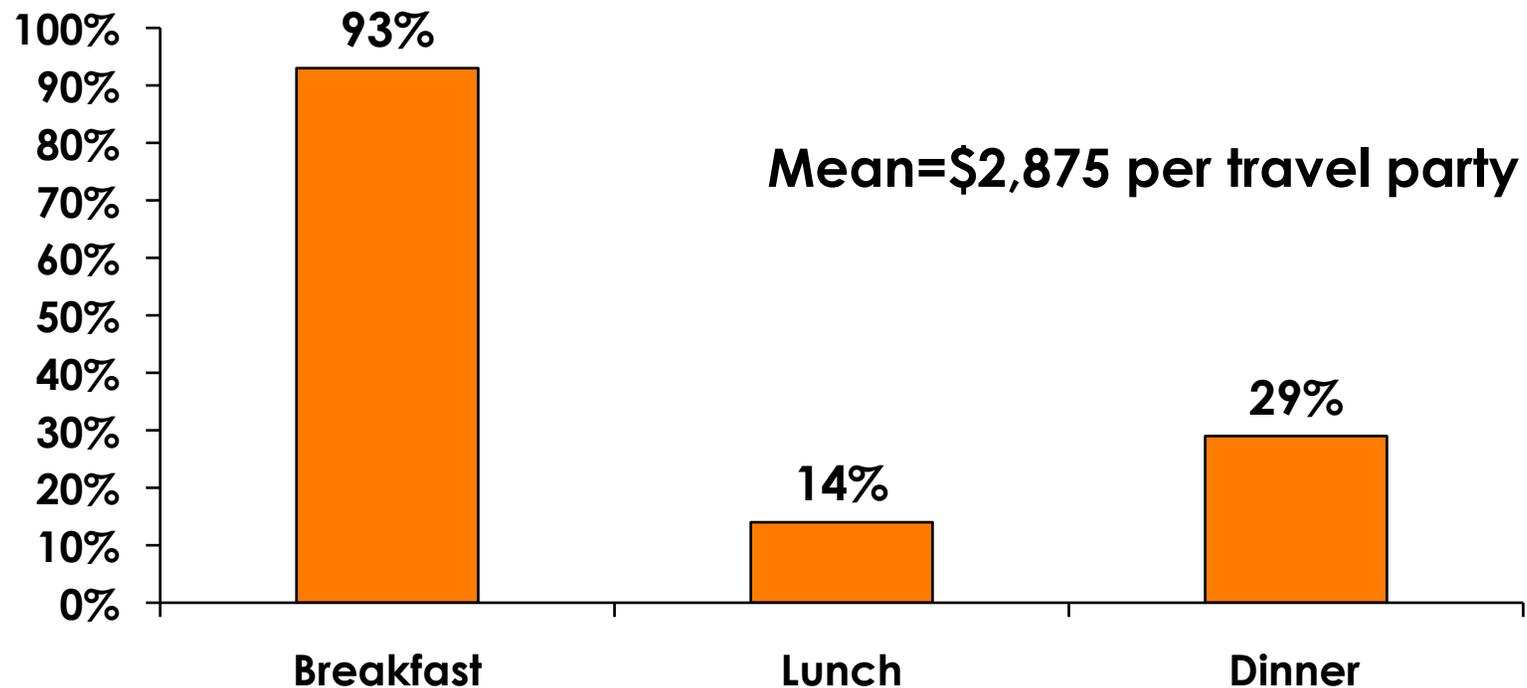
¥89.97=\$1

(Filter: Only those who responded)

| | MEAN \$ |
|---|----------------|
| Air & Accommodation package only | \$1,216 |
| Air & Accommodation w/ daily meal package | \$2,875 |
| Air only | \$806 |
| Accommodation only | \$465 |
| Accommodation w/ daily meal only | \$833 |
| Food & Beverages in Hotel | \$144 |
| Ground transportation – Japan | \$94 |
| Ground transportation – Guam | \$171 |
| Optional tours/ activities | \$336 |
| Other expenses | \$264 |
| Total Prepaid | \$1,276 |

Prepaid Meal Breakdown

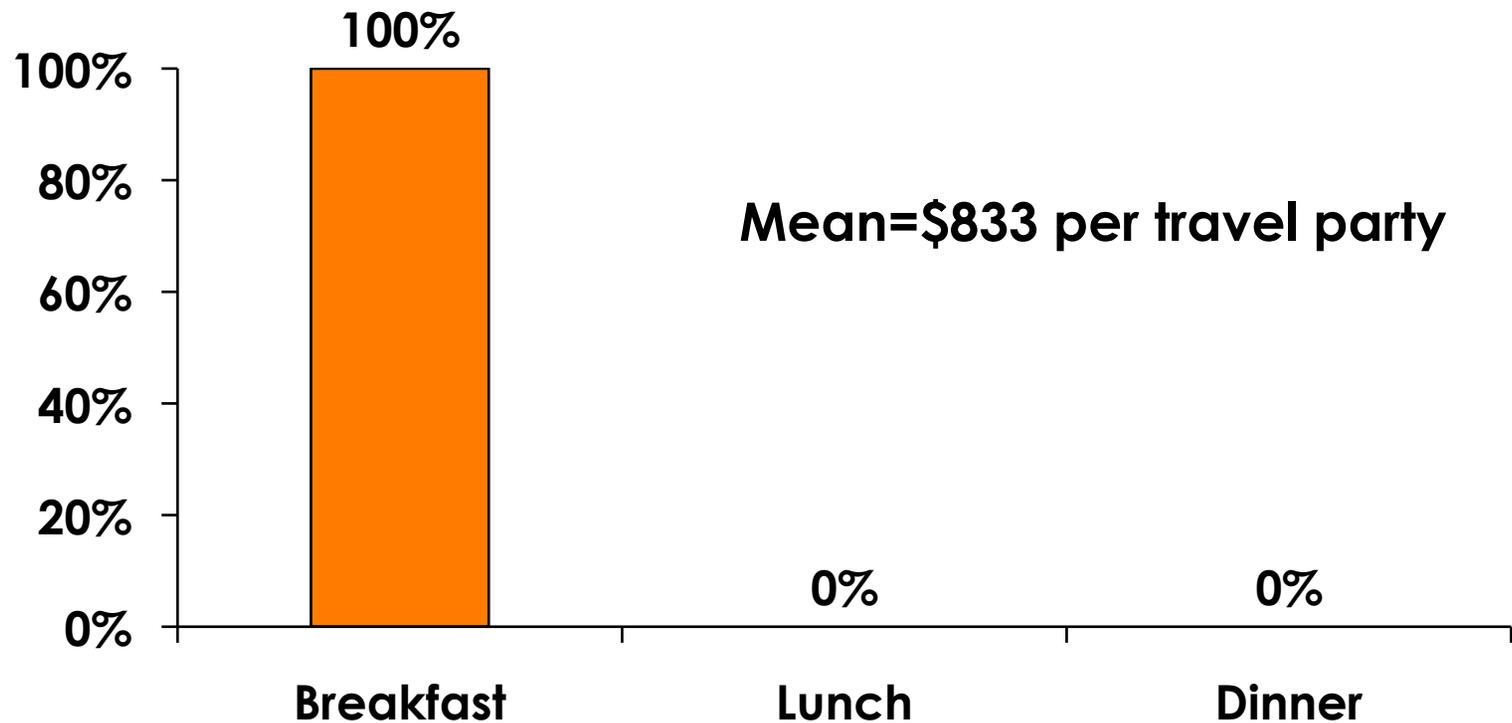
Air/ Accommodations with Daily Meal Package
n=14



Prepaid Meal Breakdown

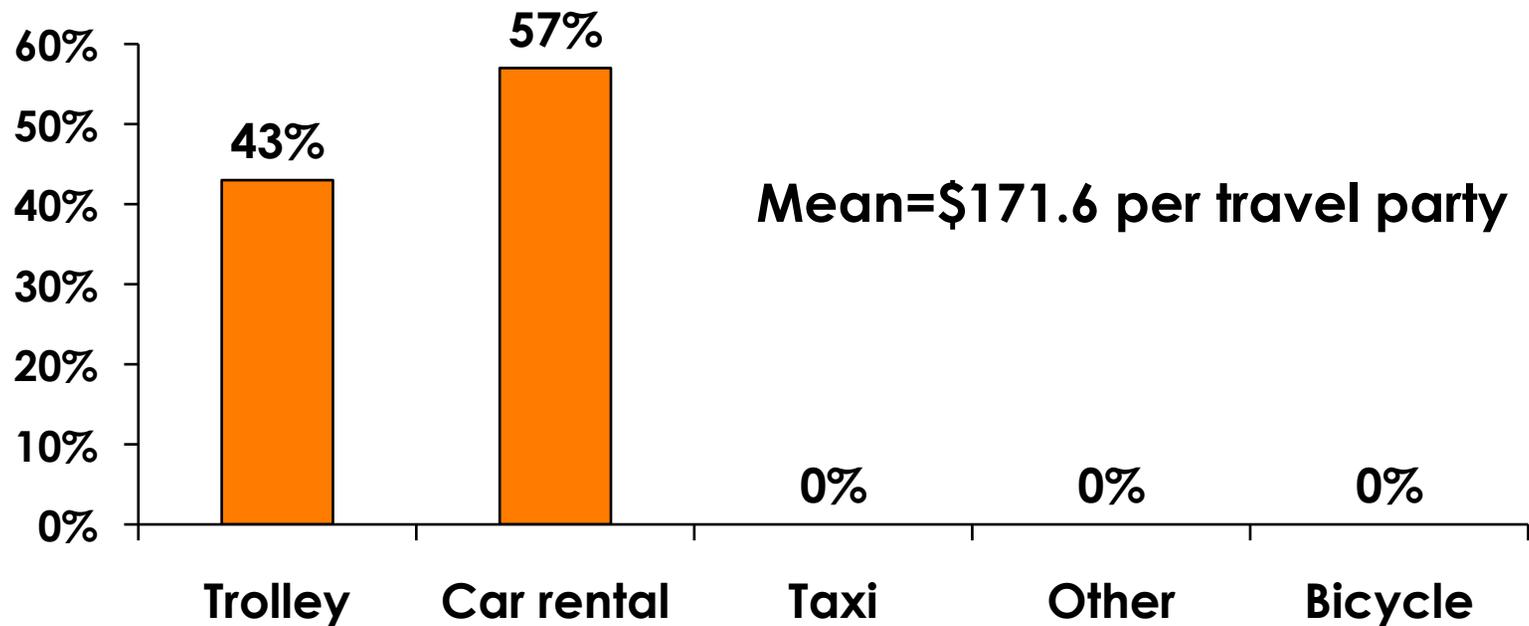
Accommodations with Daily Meal Package

n=1



Prepaid Ground Transportation

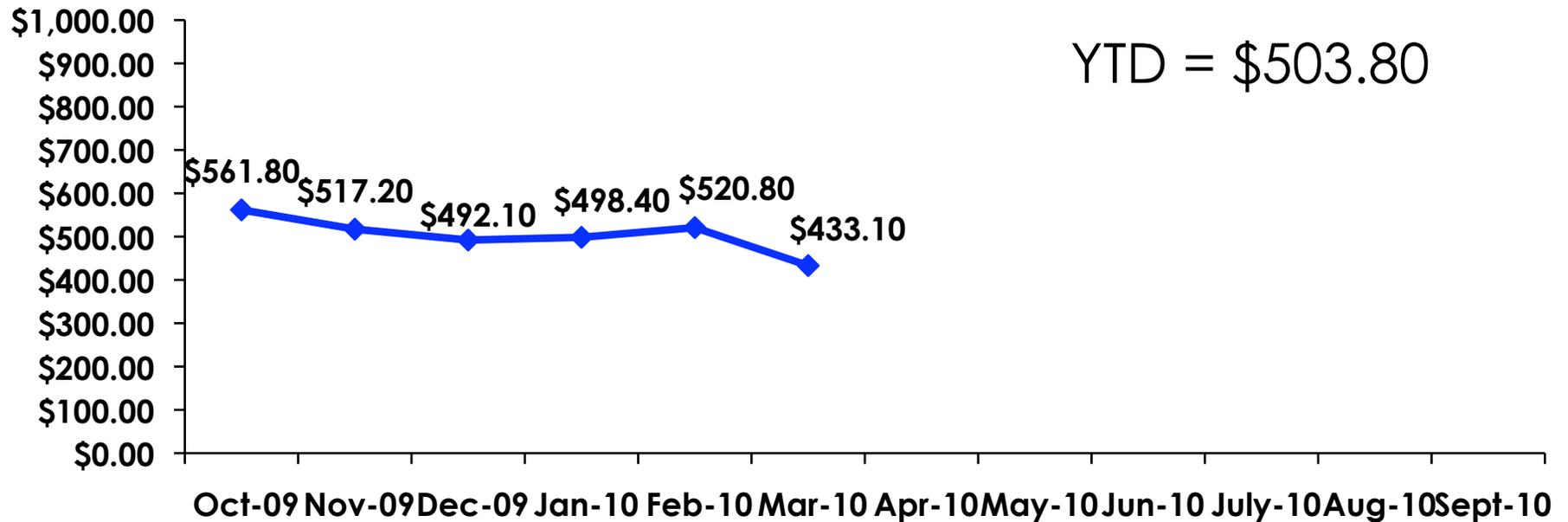
n=7



On-Island Expenditures

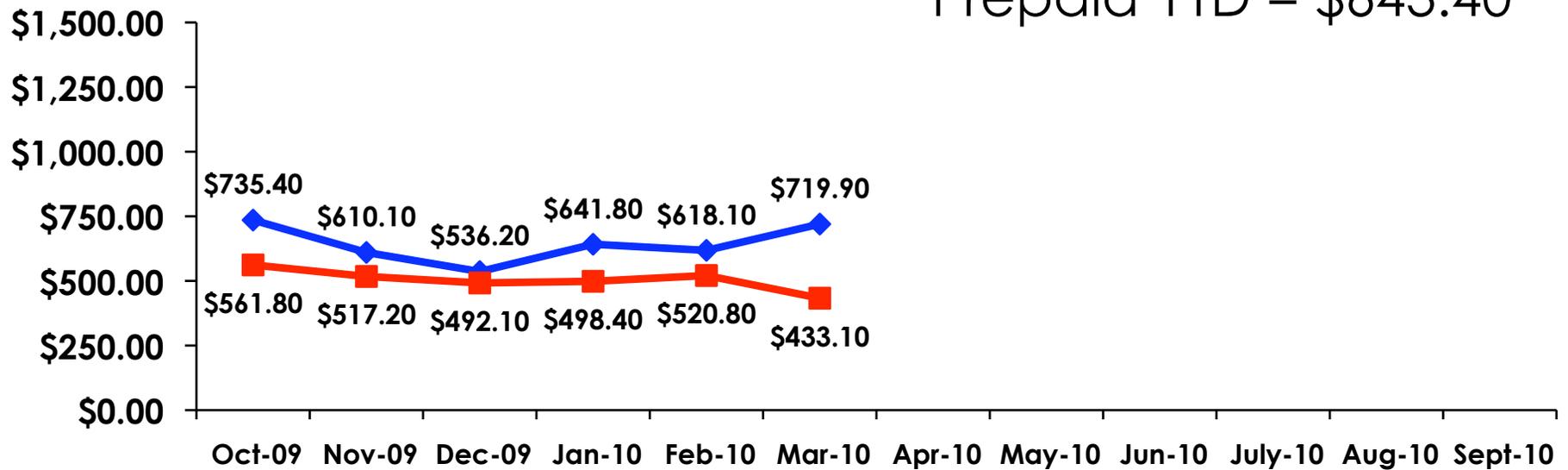
- \$640.40 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,100 = Maximum (highest amount recorded for the entire sample)
- \$433.10 = overall mean average per person on-island expenditure

On-Island Expenditures



Prepaid/On-Island Expenditures

On-Island YTD = \$503.80
 Prepaid YTD = \$643.40



Total On-Island Expenditure by Gender & Age

| | TOTAL | GENDER | | GENDER | | | | | | | | | |
|------------|----------|----------|----------|----------|----------|----------|------------|----------|----------|----------|----------|----------|------------|
| | | Male | Female | Male | | | | | Female | | | | |
| | | | | AGE | | | | | | | | | |
| | | | | <20 | 20-29 | 30-39 | 40-49 | 50+ | <20 | 20-29 | 30-39 | 40-49 | 50+ |
| Q.11A Mean | \$640.41 | \$676.13 | \$603.36 | \$555.90 | \$577.05 | \$912.73 | \$1,086.00 | \$781.11 | \$622.44 | \$518.60 | \$770.38 | \$902.55 | \$1,181.25 |
| Median | \$450 | \$450 | \$500 | \$302 | \$400 | \$650 | \$920 | \$430 | \$550 | \$400 | \$780 | \$800 | \$1,000 |

On-Island Expenditure Categories by Gender & Age

| | | TOTAL | GENDER | | AGE | | | | |
|------------------------------|--------|----------|----------|----------|----------|----------|----------|------------|----------|
| | | | Male | Female | <20 | 20-29 | 30-39 | 40-49 | 50+ |
| F&B-HOTEL | Mean | \$25.12 | \$21.34 | \$29.04 | \$5.16 | \$15.79 | \$34.86 | \$72.46 | \$82.76 |
| | Median | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| F&B-FF REST/CONV | Mean | \$33.37 | \$36.90 | \$29.72 | \$71.89 | \$26.88 | \$36.29 | \$48.58 | \$50.12 |
| | Median | \$15 | \$20 | \$11 | \$20 | \$15 | \$20 | \$34 | \$0 |
| F&B-OUT- SIDE HOTEL/ REST | Mean | \$67.14 | \$78.18 | \$55.69 | \$28.95 | \$54.96 | \$110.71 | \$124.08 | \$100.00 |
| | Median | \$20 | \$20 | \$20 | \$0 | \$8 | \$85 | \$63 | \$55 |
| OPTIONAL TOUR | Mean | \$89.78 | \$108.35 | \$70.52 | \$110.95 | \$81.74 | \$124.43 | \$90.00 | \$104.59 |
| | Median | \$0 | \$43 | \$0 | \$50 | \$20 | \$95 | \$0 | \$0 |
| GIFT/ SOUV-SELF | Mean | \$188.79 | \$140.14 | \$239.23 | \$144.21 | \$187.75 | \$158.71 | \$266.58 | \$195.76 |
| | Median | \$50 | \$20 | \$75 | \$30 | \$50 | \$60 | \$155 | \$0 |
| GIFT/SOUV- F&F AT HOME | Mean | \$106.74 | \$105.64 | \$107.87 | \$110.53 | \$92.20 | \$160.57 | \$156.54 | \$114.71 |
| | Median | \$50 | \$35 | \$62 | \$50 | \$40 | \$100 | \$100 | \$0 |
| LOCAL TRANS | Mean | \$15.76 | \$18.68 | \$12.72 | \$1.05 | \$10.87 | \$31.83 | \$34.96 | \$36.76 |
| | Median | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| OTHER EXP | Mean | \$143.25 | \$169.00 | \$116.56 | \$122.58 | \$117.27 | \$205.31 | \$215.19 | \$284.71 |
| | Median | \$0 | \$0 | \$0 | \$10 | \$0 | \$0 | \$0 | \$50 |
| TOTAL ON ISLAND | Mean | \$640.41 | \$676.13 | \$603.36 | \$587.42 | \$546.70 | \$859.86 | \$1,008.38 | \$969.41 |
| | Median | \$450 | \$450 | \$500 | \$304 | \$400 | \$700 | \$800 | \$900 |

On-Island Expenditures

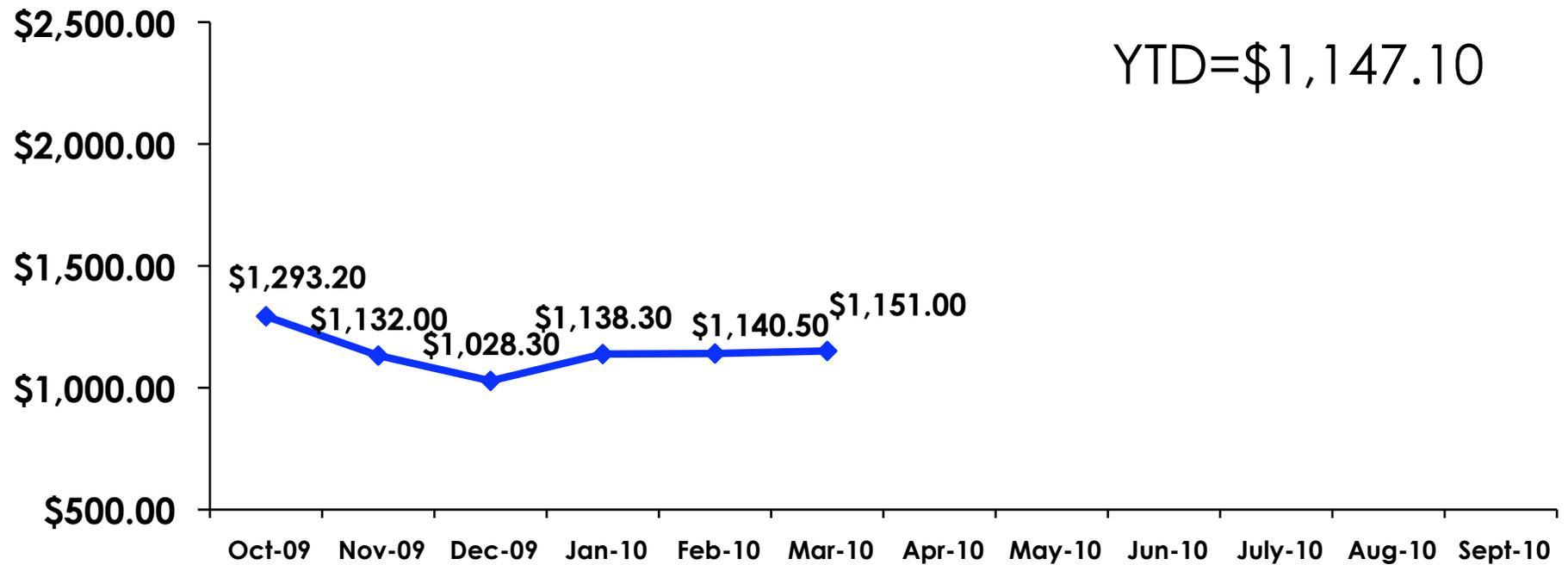
First Timers & Repeaters

| | | TRIPS TO GUAM | |
|---------------------------|--------|---------------|----------|
| | | 1st | Repeat |
| F&B-HOTEL | Mean | \$16.73 | \$50.07 |
| | Median | \$0 | \$0 |
| F&B-FF REST/CONV | Mean | \$31.31 | \$39.52 |
| | Median | \$15 | \$20 |
| F&B-OUT- SIDE HOTEL/ REST | Mean | \$55.45 | \$101.93 |
| | Median | \$6 | \$70 |
| OPTIONAL TOUR | Mean | \$86.43 | \$99.76 |
| | Median | \$40 | \$0 |
| GIFT/ SOUV-SELF | Mean | \$142.11 | \$327.69 |
| | Median | \$30 | \$100 |
| GIFT/ SOUV- F&F AT HOME | Mean | \$100.54 | \$125.18 |
| | Median | \$50 | \$50 |
| LOCAL TRANS | Mean | \$10.87 | \$30.30 |
| | Median | \$0 | \$0 |
| OTHER EXP | Mean | \$128.21 | \$188.01 |
| | Median | \$0 | \$0 |
| TOTAL ON ISLAND | Mean | \$569.27 | \$852.10 |
| | Median | \$400 | \$550 |

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,151.0 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$9,998 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

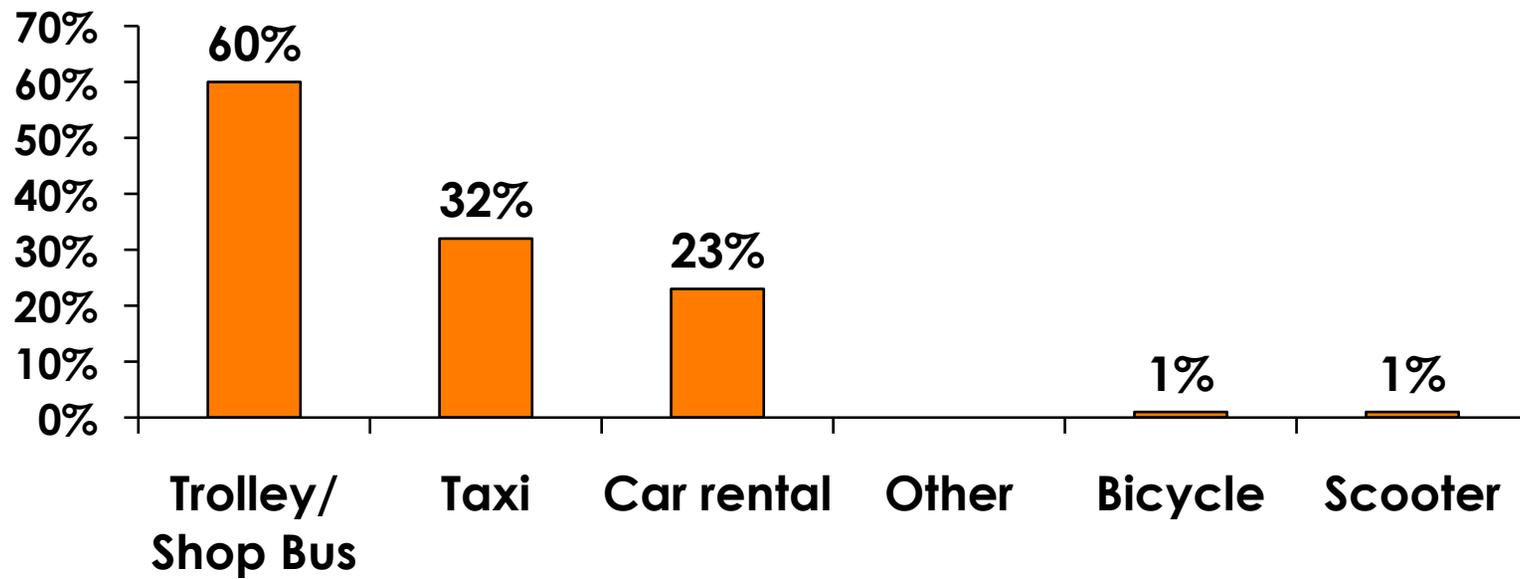


Breakdown of On-Island Expenditures

| | MEAN \$ |
|--|-----------------|
| Food & beverage in a hotel | \$25.10 |
| Food & beverage in fast food restaurant/ convenience store | \$33.40 |
| Food & beverage at restaurants or drinking establishments outside a hotel | \$67.10 |
| Optional tours and activities | \$89.80 |
| Gifts/ souvenirs for yourself/companions | \$188.80 |
| Gifts/ souvenirs for friends/family at home | \$106.70 |
| Local transportation | \$15.80 |
| Other expenses not covered | \$143.30 |
| Average Total | \$640.40 |

Local Transportation

n=82



Guam Airport Expenditures

- \$32.70 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

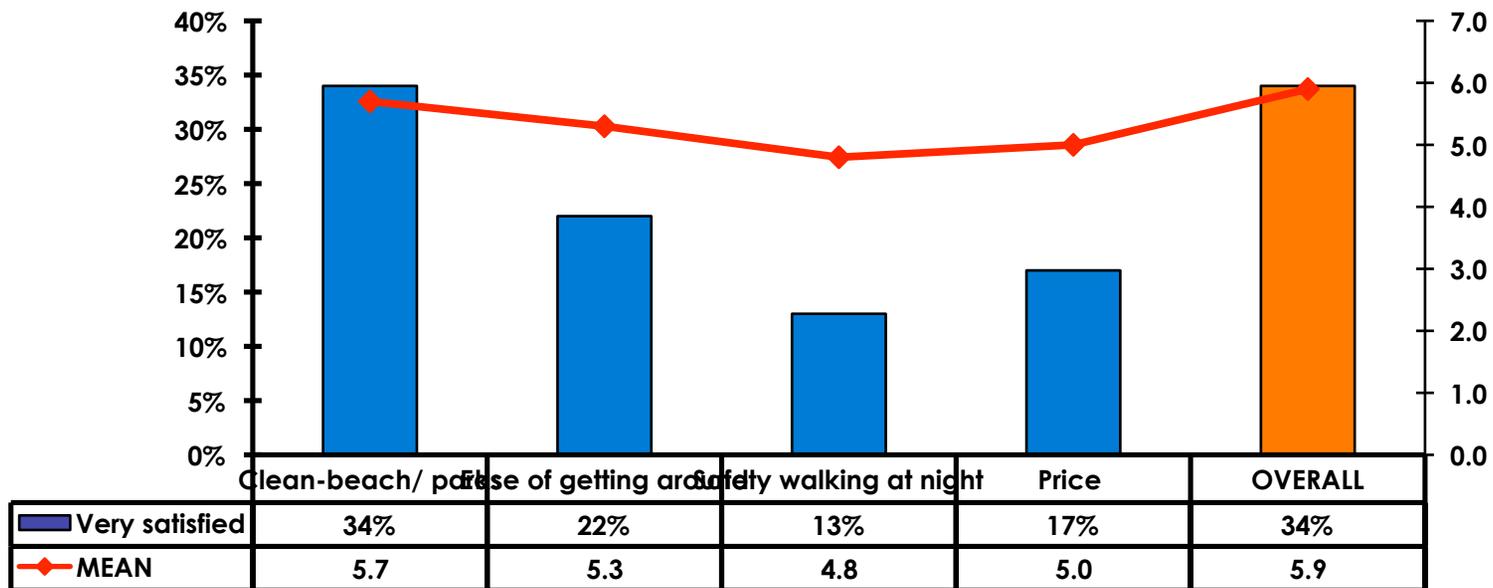
| | MEAN \$ |
|-------------------------------|----------------|
| Food & Beverages | \$8.00 |
| Gifts/Souvenirs Self | \$17.60 |
| Gifts/Souvenirs Others | \$7.10 |
| Total | \$32.70 |

SECTION 4 **VISITOR SATISFACTION**

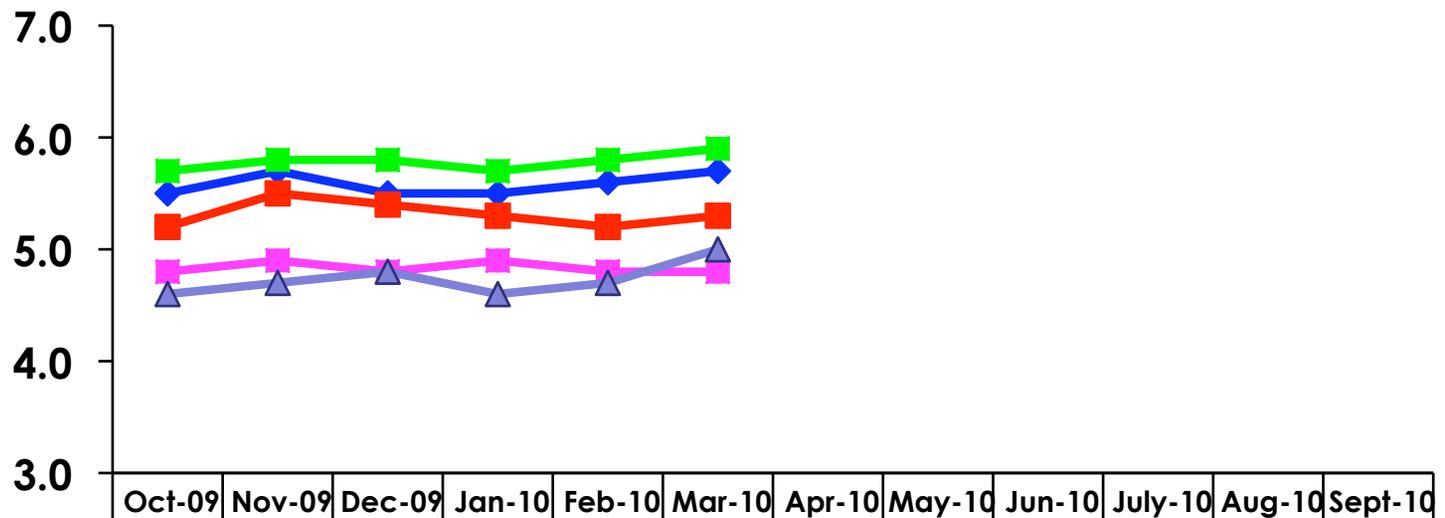
Satisfaction Scores Overall

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Guam Perceptions

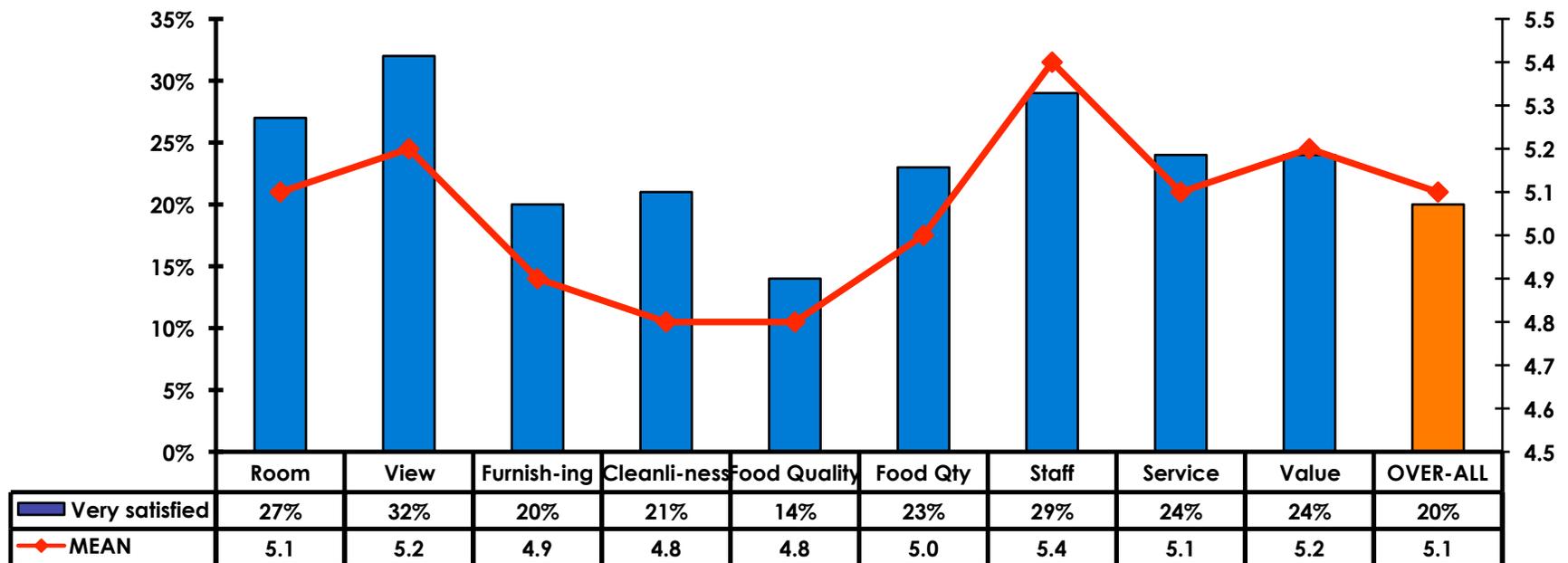


| | | | | | | | | | | | | |
|-----------------------|-----|-----|-----|-----|-----|-----|--|--|--|--|--|--|
| ◆ Clean beach/park | 5.5 | 5.7 | 5.5 | 5.5 | 5.6 | 5.7 | | | | | | |
| ■ Ease getting around | 5.2 | 5.5 | 5.4 | 5.3 | 5.2 | 5.3 | | | | | | |
| ■ Safe walk night | 4.8 | 4.9 | 4.8 | 4.9 | 4.8 | 4.8 | | | | | | |
| ▲ Price | 4.6 | 4.7 | 4.8 | 4.6 | 4.7 | 5.0 | | | | | | |
| ■ Overall | 5.7 | 5.8 | 5.8 | 5.7 | 5.8 | 5.9 | | | | | | |

Quality of Accommodations

7pt Rating Scale

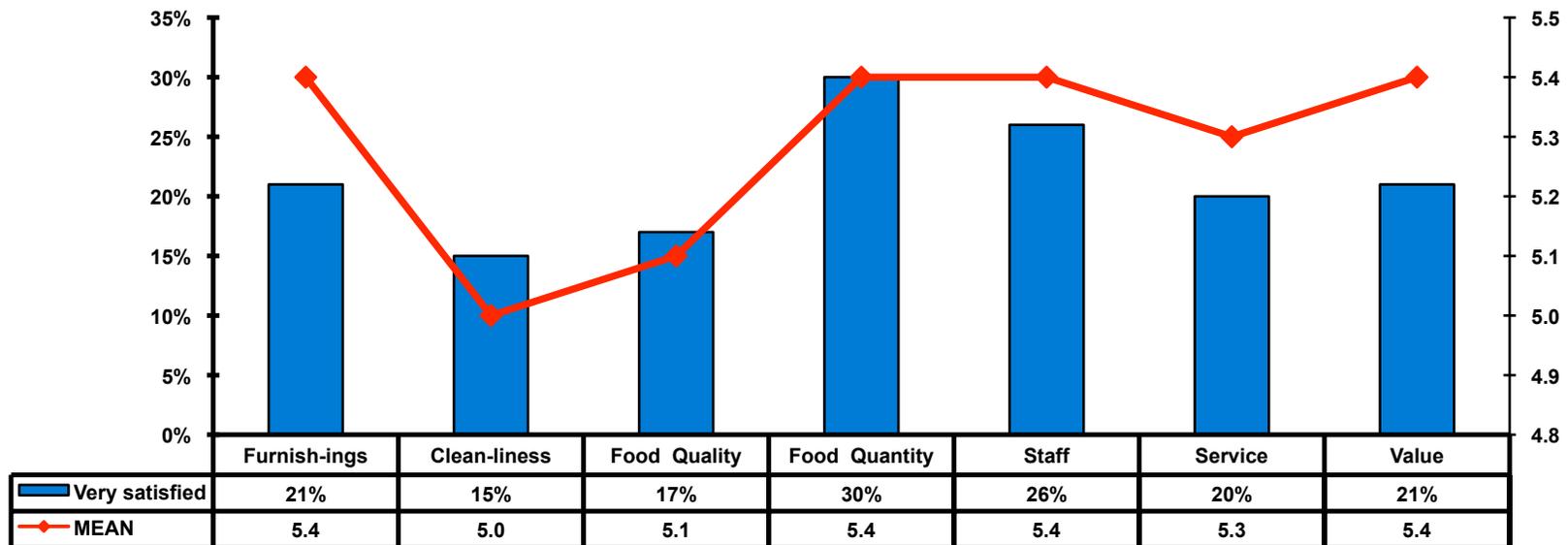
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

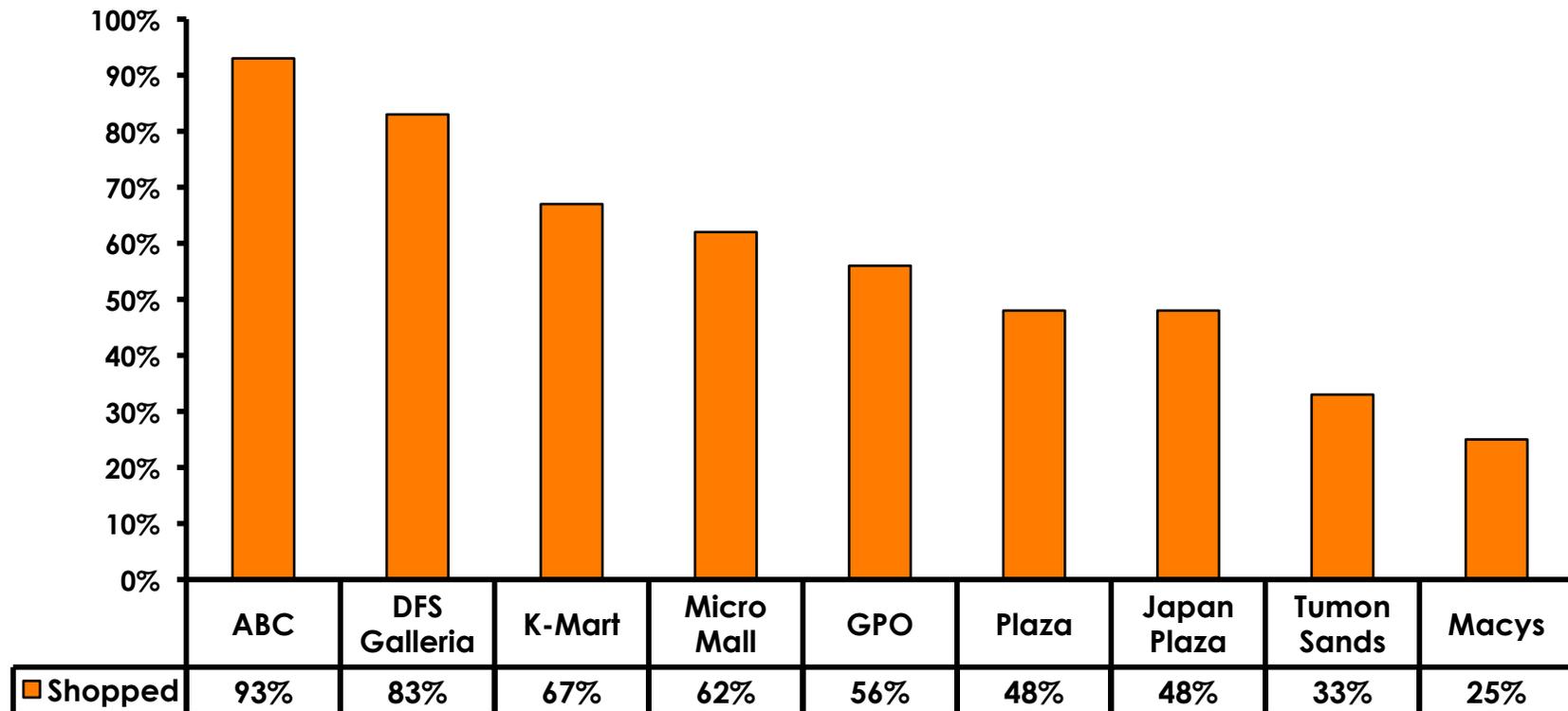
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

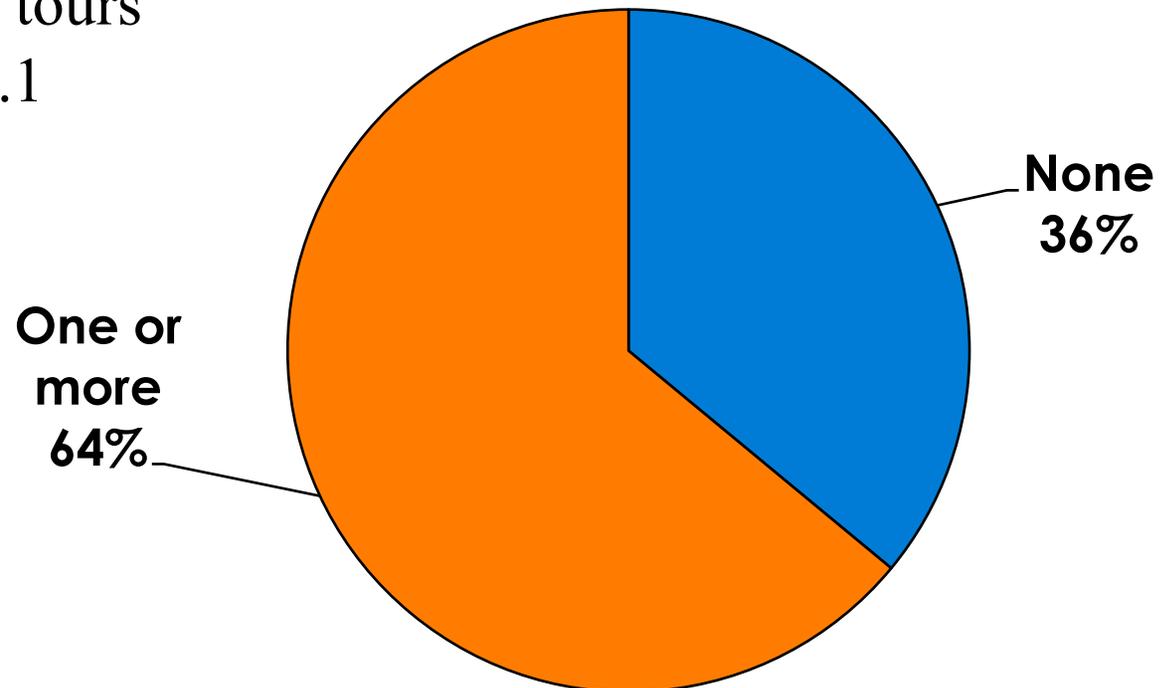
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

| Quality of Shopping | Variety of Shopping |
|------------------------------|------------------------------|
| Score of 6 to 7 = 59% | Score of 6 to 7 = 55% |
| Score of 4 to 5 = 33% | Score of 4 to 5 = 35% |
| Score 1 to 3 = 8% | Score 1 to 3 = 10% |
| MEAN = 5.5 | MEAN = 5.5 |

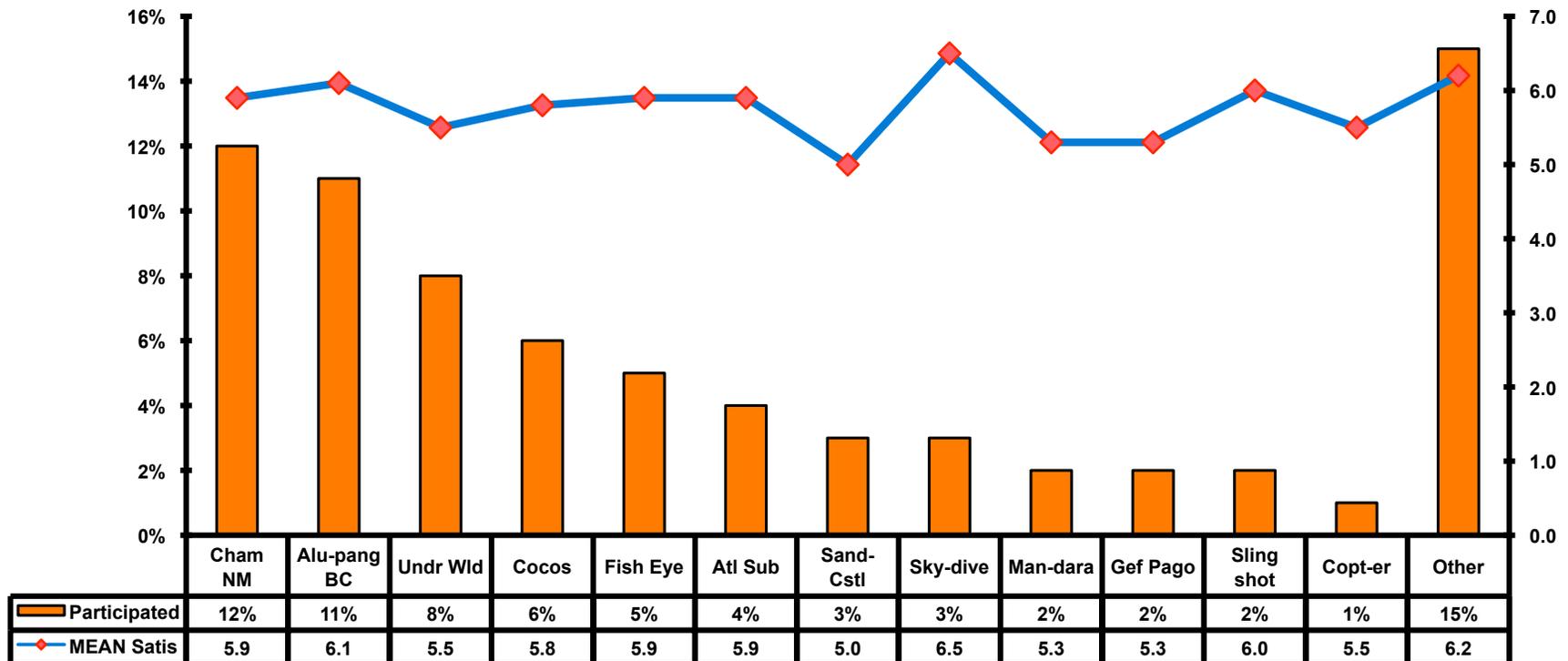
Optional Tour Participation

- Average number of tours participated in is 1.1



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 = 42% |
| Score 1 to 3 = 2% | Score 1 to 3 = 2% |
| MEAN = 5.6 | MEAN = 5.5 |

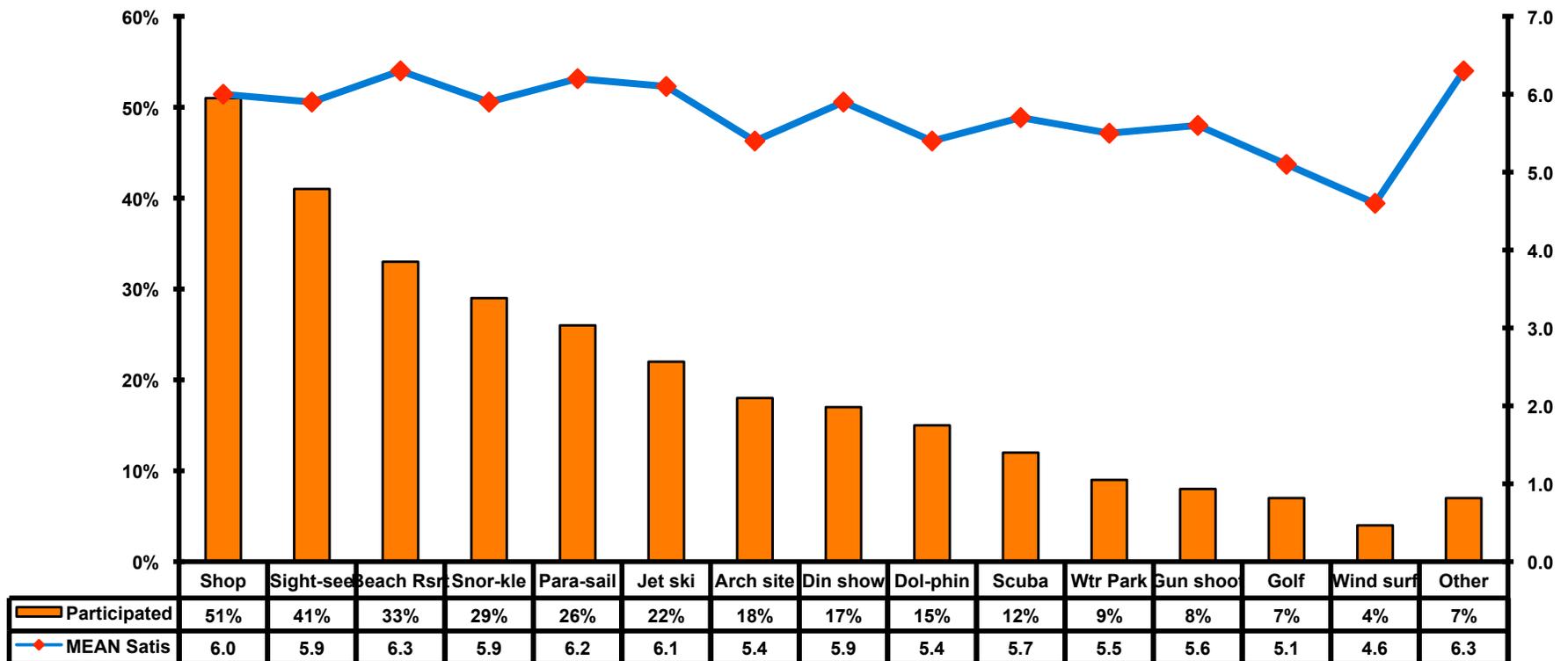
Night Tours Satisfaction

7pt Rating Scale

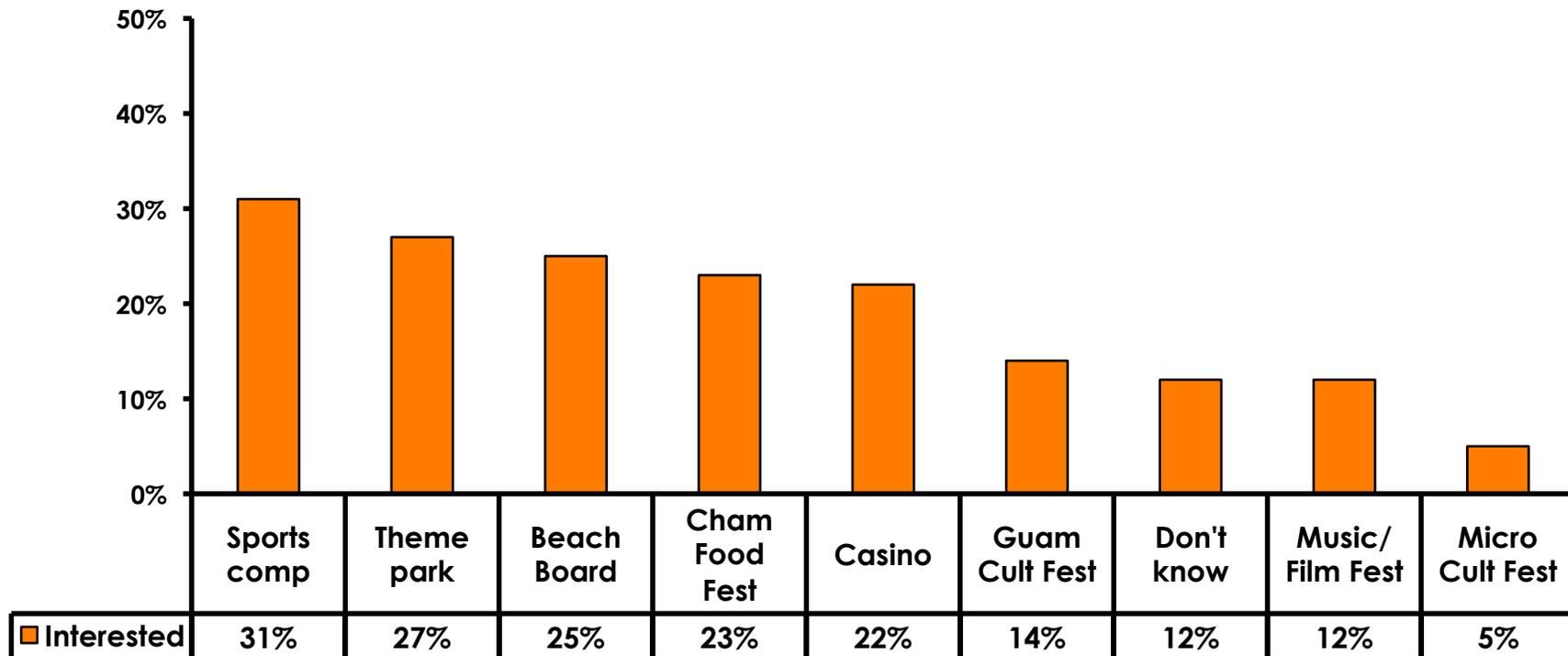
7=Very Satisfied/ 1=Very Dissatisfied

| Quality of Night Tour | Variety of Night Tour |
|------------------------------|------------------------------|
| Score of 6 to 7 = 31% | Score of 6 to 7 = 29% |
| Score of 4 to 5 = 66% | Score of 4 to 5 = 67% |
| Score 1 to 3 = 3% | Score 1 to 3 = 4% |
| MEAN = 4.8 | MEAN = 4.8 |

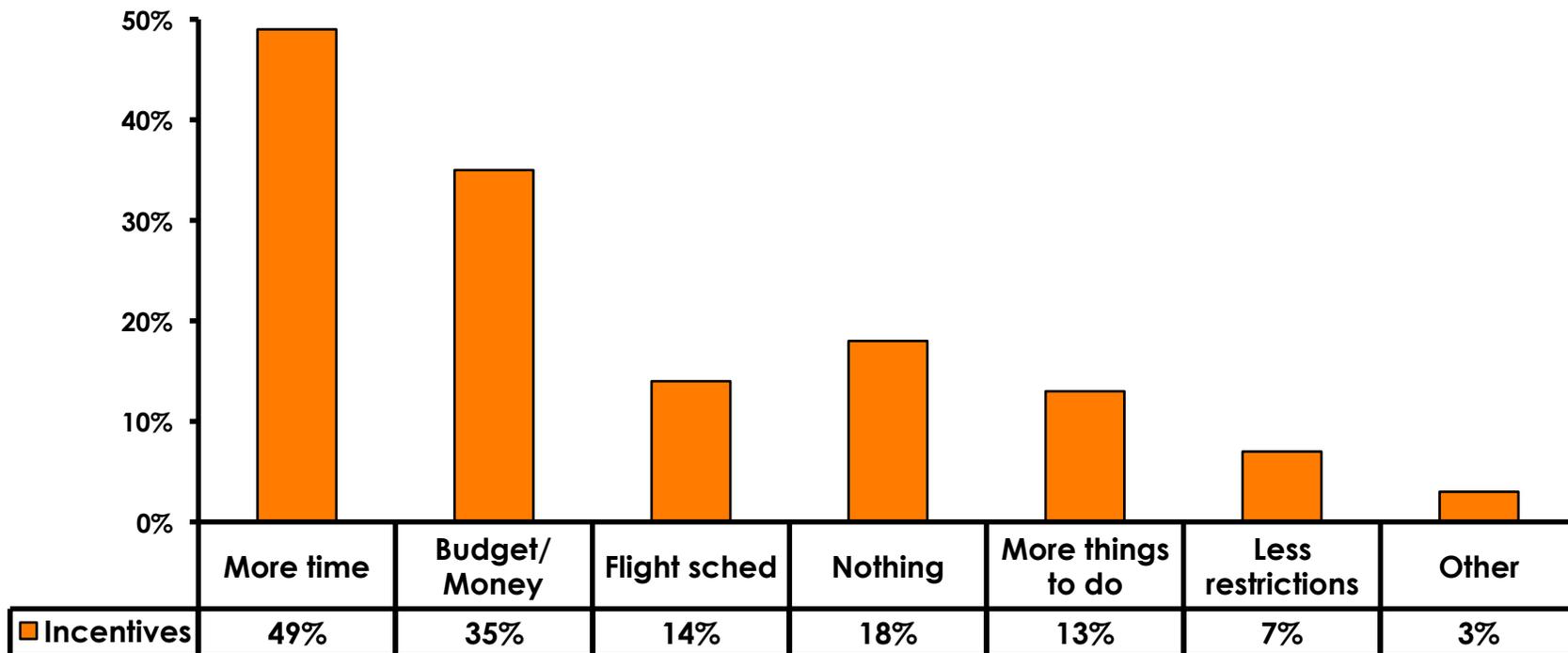
Satisfaction with Other Activities



Which activities or attractions would you most likely participate in if they were available on Guam?



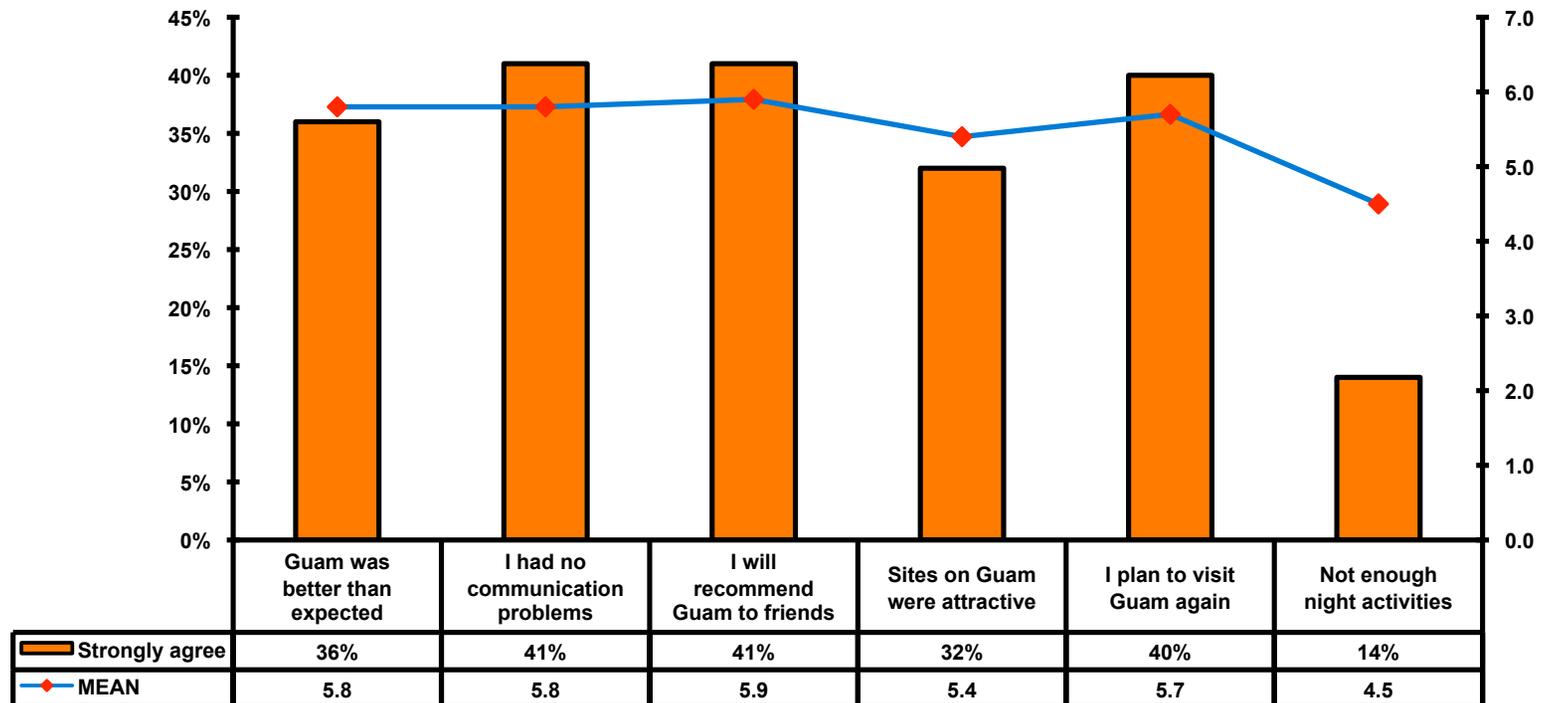
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

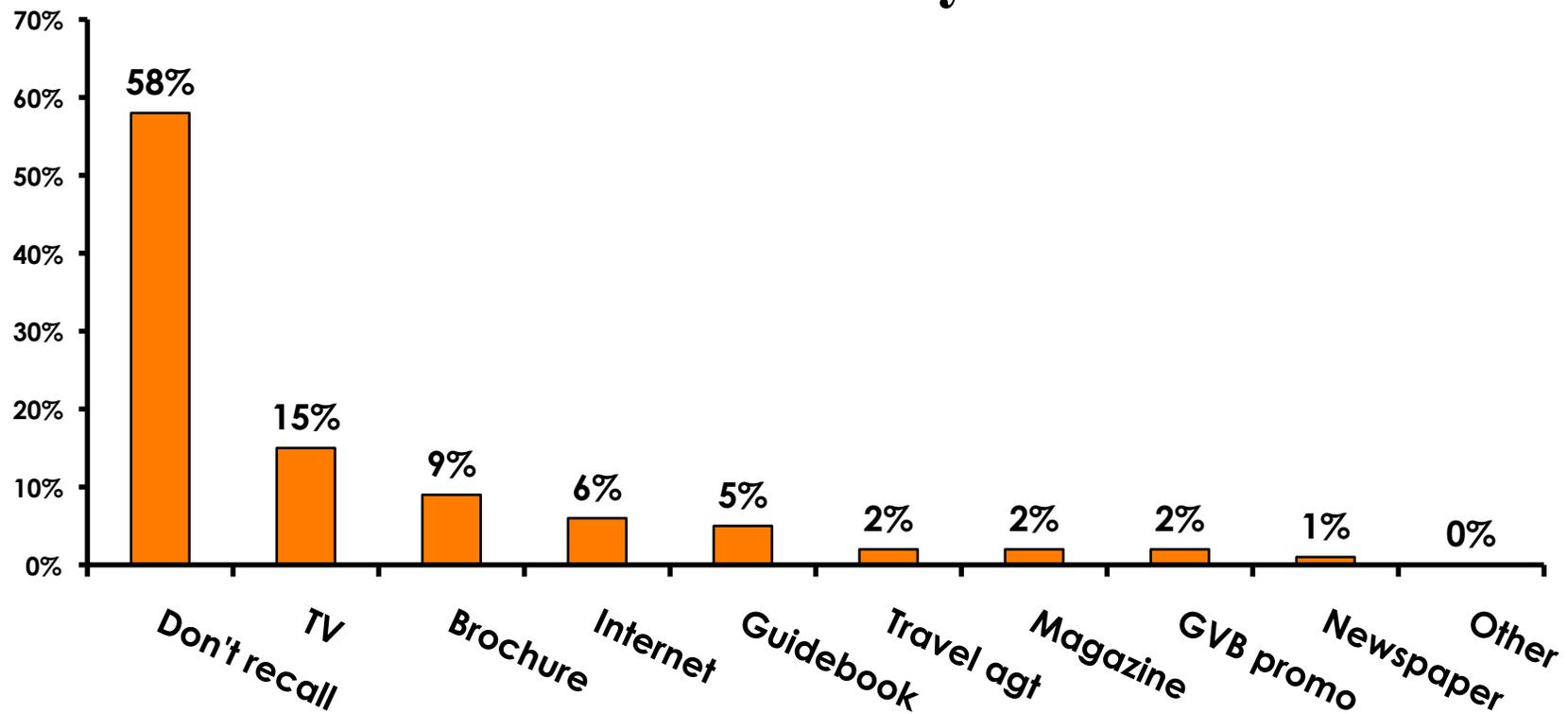
7=Very Satisfied/ 1=Very Dissatisfied



SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days



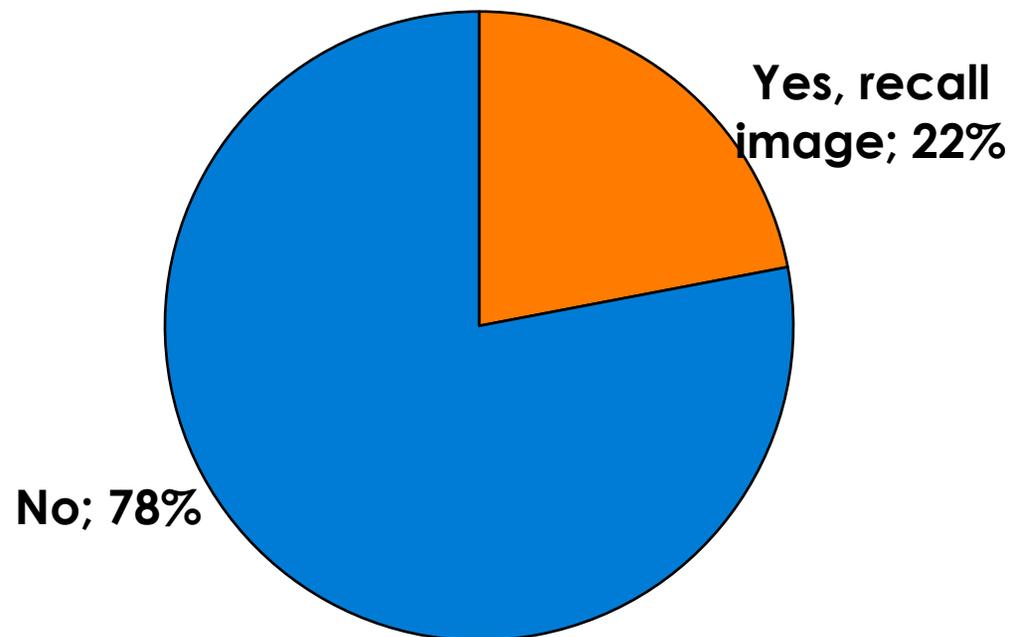
Message Recall

(Filter: recall ad/promo n=139)

- 61% An image
- 33% Other
- 2% Don't recall
- 6% Tag line

Aided Awareness - Image Test

(Filter: recall ad/promo n=139)



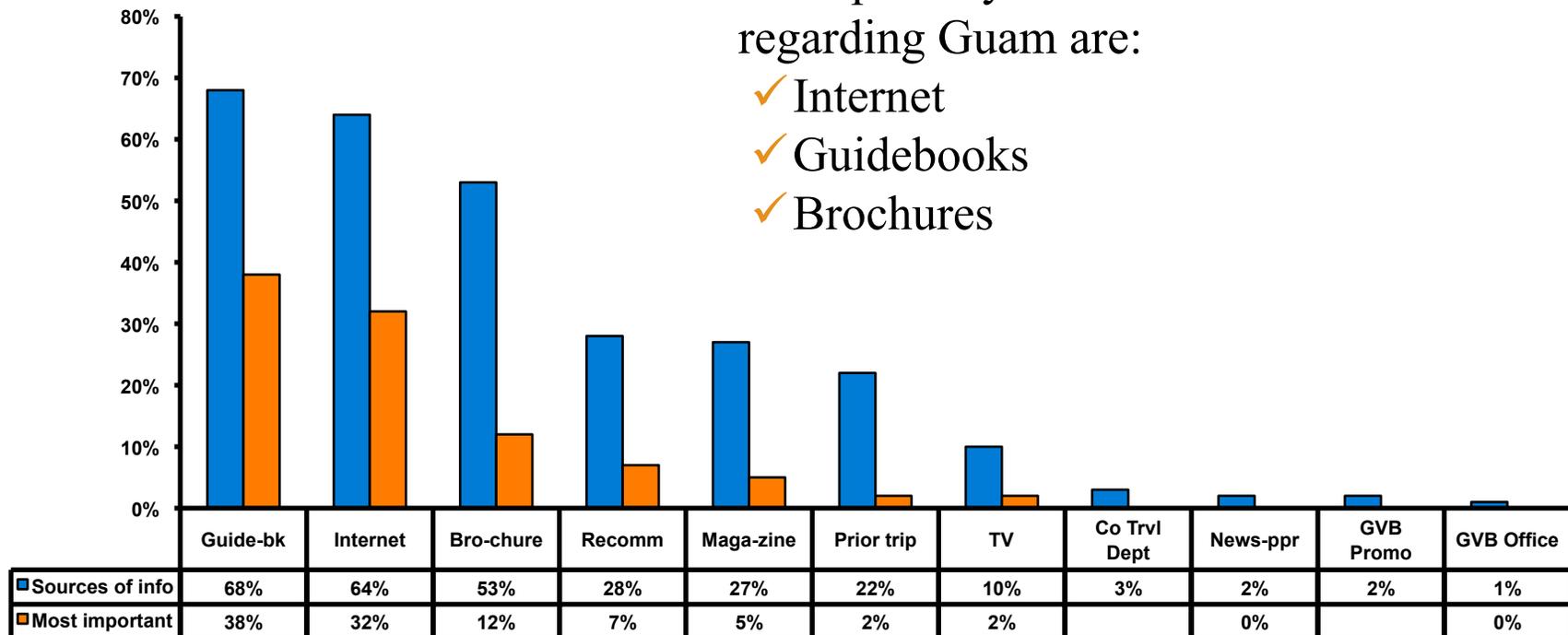
Aided Image Recall

(Filter: recall image n=30)

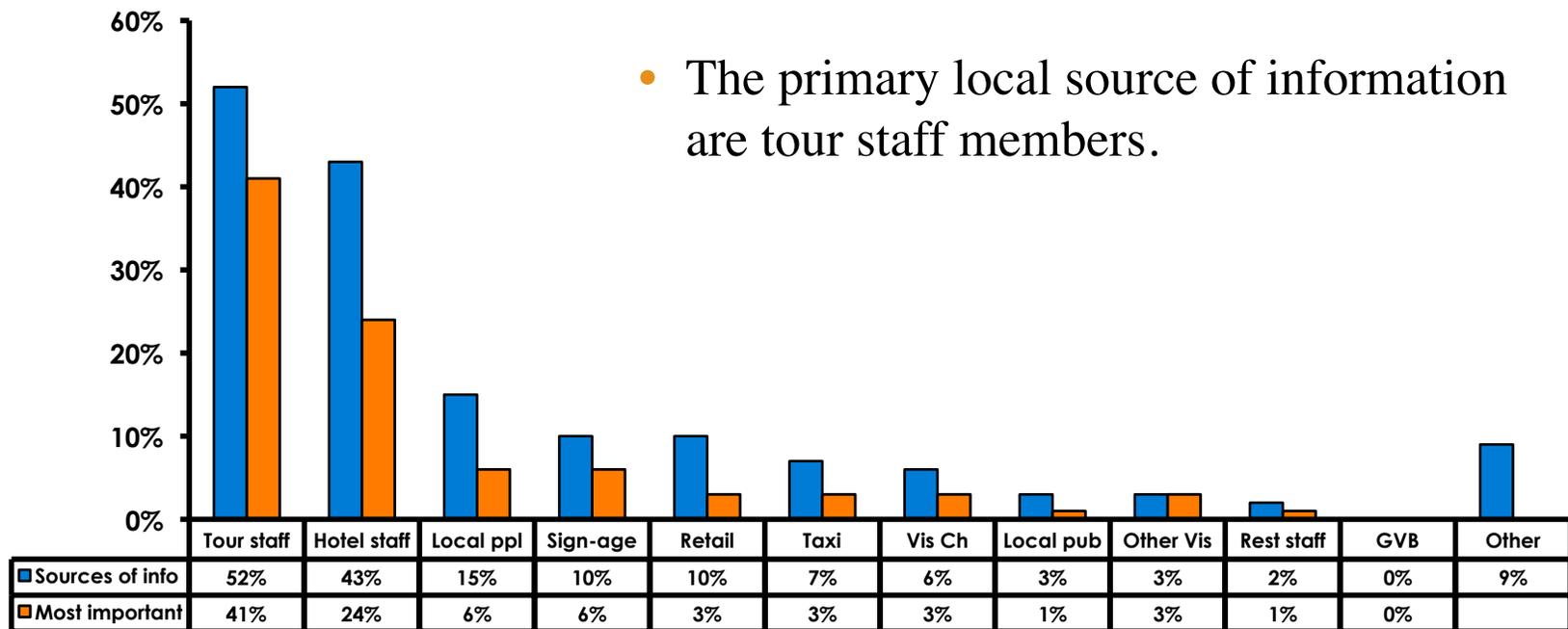
- **60%** - Guam Wedding (Nodame Canterbile Cinema Ad)
- **40%** - Koko Bird – Sr. Version (Shimura's Zoo Program Ad)
- **17%** - Koko Bird- OL Version (Asada! Namadesu Tabi Salad Program Ad)

Sources of Information Pre-arrival

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

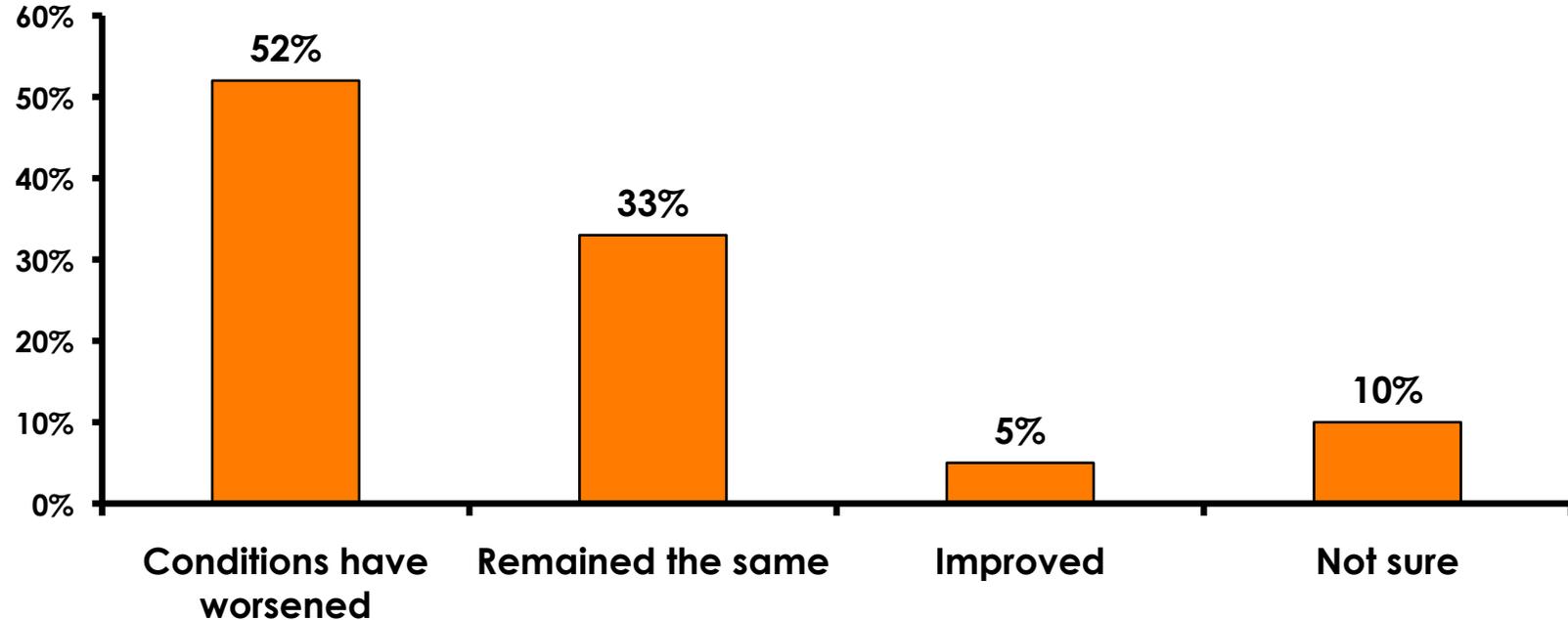


Sources of Information Post-arrival



SECTION 6
OTHER ISSUES

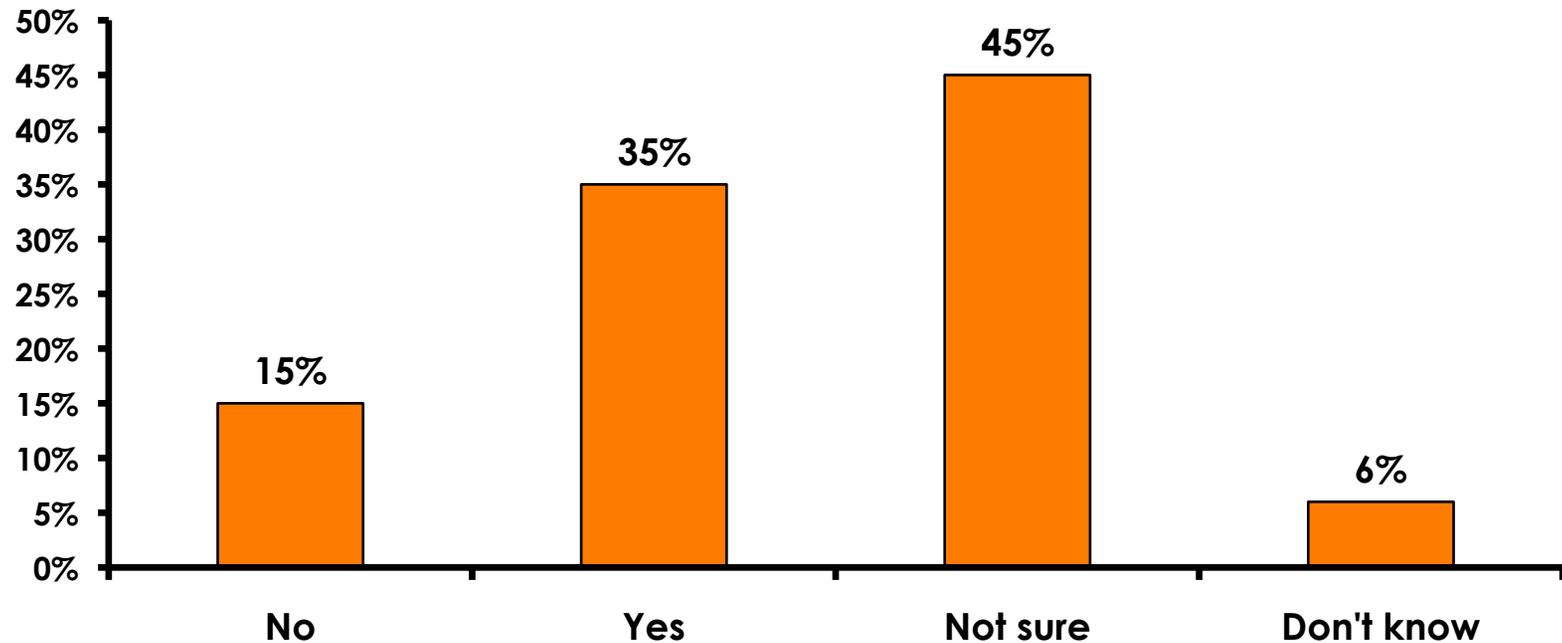
Rating the Japan economy compared to 12 months ago - Overall



Rating the Japan economy compared to 12 months ago - By Age & Income

| | | AGE | | | | | PERSONAL INCOME | | | | | | |
|-------|-----------------------------------|-----|-------|-------|-------|-----|-----------------|-------------|-------------|-------------|-------------|---------|--------|
| | | <20 | 20-29 | 30-39 | 40-49 | 50+ | <Y3.0M | Y3.0M-Y3.9M | Y4.0M-Y4.9M | Y5.0M-Y6.9M | Y7.0M-Y9.9M | Y10.0M+ | No Inc |
| Q.23 | Conditions have worsened | 42% | 51% | 63% | 54% | 59% | 69% | 34% | 48% | 51% | 58% | 52% | 38% |
| | Conditions have remained the same | 32% | 34% | 29% | 46% | 18% | 21% | 46% | 44% | 34% | 26% | 43% | 45% |
| | Conditions have improved | | 5% | 6% | | 12% | 2% | 11% | 7% | 8% | 3% | 2% | 3% |
| | Do not know | 26% | 10% | 3% | | 12% | 8% | 9% | | 8% | 13% | 2% | 14% |
| Total | Count | 19 | 232 | 35 | 26 | 17 | 48 | 35 | 27 | 53 | 38 | 42 | 29 |

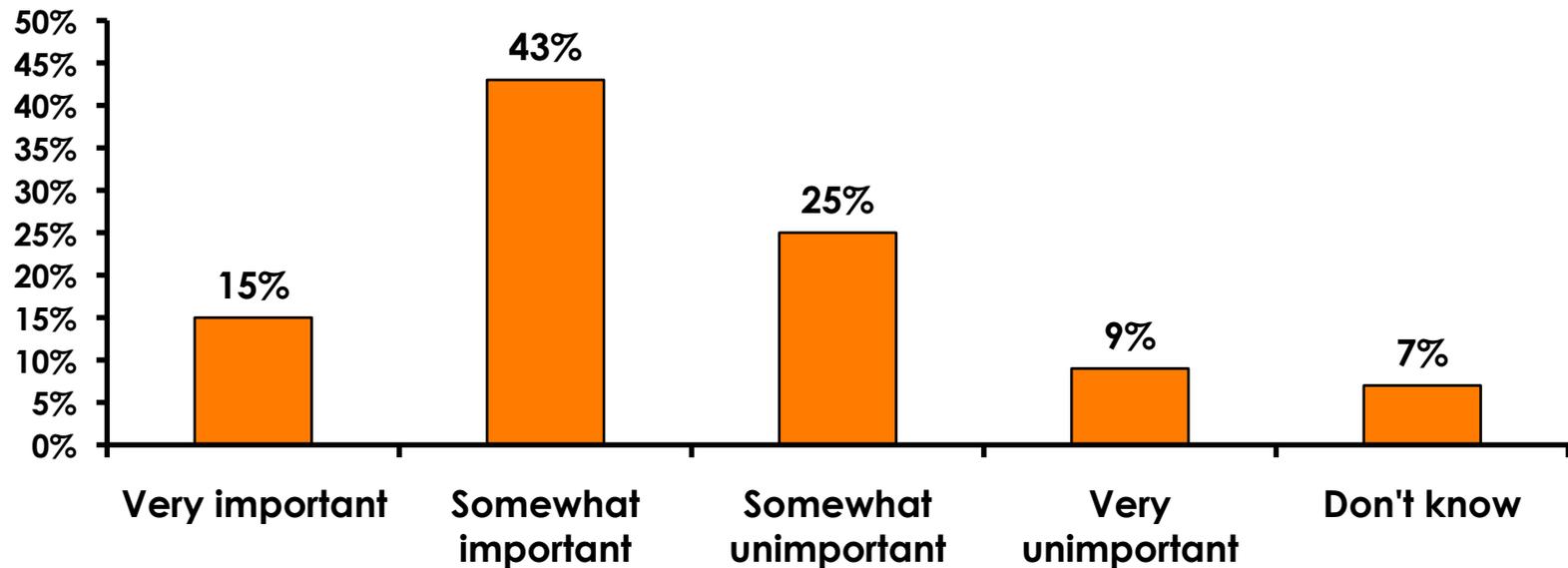
Good time to spend money on travel outside of Japan - Overall



Good time to spend money on travel outside of Japan by Age & Income

| | | AGE | | | | | PERSONAL INCOME | | | | | | |
|-------|-------------|-----|-------|-------|-------|-----|-----------------|-------------|-------------|-------------|-------------|---------|--------|
| | | <20 | 20-29 | 30-39 | 40-49 | 50+ | <Y3.0M | Y3.0M-Y3.9M | Y4.0M-Y4.9M | Y5.0M-Y6.9M | Y7.0M-Y9.9M | Y10.0M+ | No Inc |
| Q.24 | No | 21% | 13% | 20% | 19% | 18% | 6% | 23% | 15% | 17% | 32% | 7% | 10% |
| | Yes | 32% | 36% | 26% | 23% | 59% | 45% | 14% | 48% | 43% | 26% | 29% | 34% |
| | Not sure | 37% | 44% | 54% | 58% | 24% | 41% | 57% | 37% | 38% | 39% | 60% | 48% |
| | Do not know | 11% | 7% | | | | 8% | 6% | | 2% | 3% | 5% | 7% |
| Total | Count | 19 | 233 | 35 | 26 | 17 | 49 | 35 | 27 | 53 | 38 | 42 | 29 |

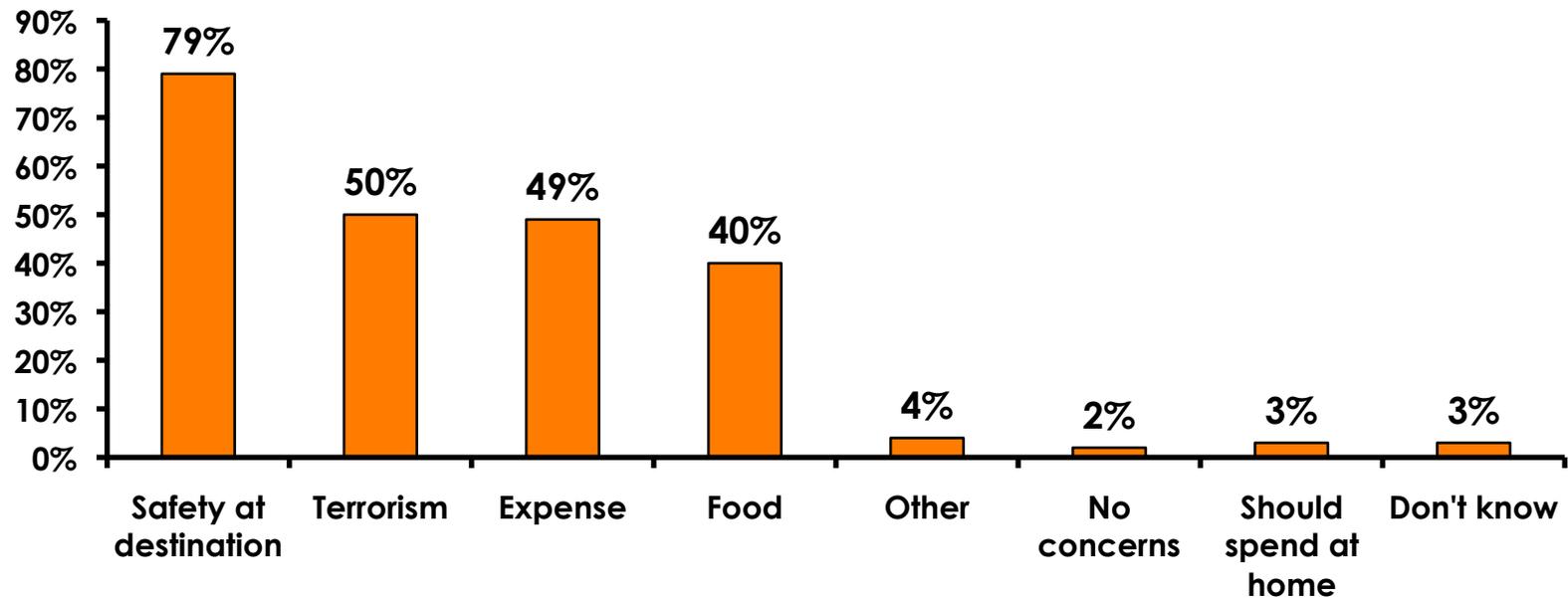
The importance of the state of the Japanese economy in decision to travel outside of Japan - Overall



The importance of the state of the Japanese economy in decision to travel outside of Japan by Age & Income

| | | AGE | | | | | PERSONAL INCOME | | | | | | N of Inc |
|-------|----------------------|-----|-------|-------|-------|-----|-----------------|-------------|-------------|-------------|-------------|---------|----------|
| | | <20 | 20-29 | 30-39 | 40-49 | 50+ | <Y3.0M | Y3.0M-Y3.9M | Y4.0M-Y4.9M | Y5.0M-Y6.9M | Y7.0M-Y9.9M | Y10.0M+ | |
| Q.25 | Very unimportant | 26% | 8% | 9% | 12% | 6% | 3% | 11% | 11% | 11% | 10% | 10% | |
| | Somewhat unimportant | 11% | 25% | 26% | 38% | 24% | 20% | 26% | 25% | 34% | 36% | 17% | |
| | Somewhat important | 37% | 43% | 43% | 42% | 45% | 51% | 44% | 38% | 39% | 31% | 41% | |
| | Very important | 5% | 15% | 20% | 19% | 12% | 17% | 15% | 26% | 13% | 19% | 24% | |
| | Do not know | 21% | 8% | 3% | | 12% | 9% | 4% | | 3% | 5% | 7% | |
| Total | Count | 19 | 233 | 35 | 26 | 17 | 49 | 35 | 27 | 53 | 38 | 42 | 29 |

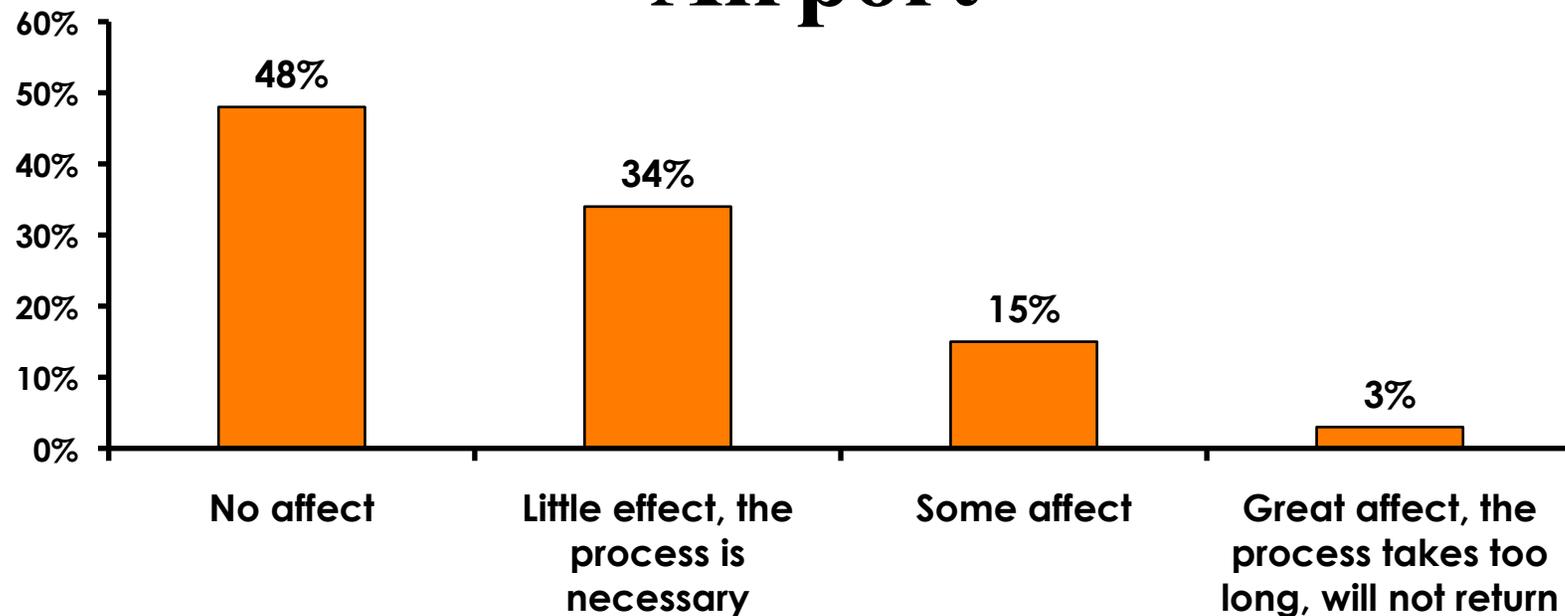
Concerns about travel outside of Japan - Overall



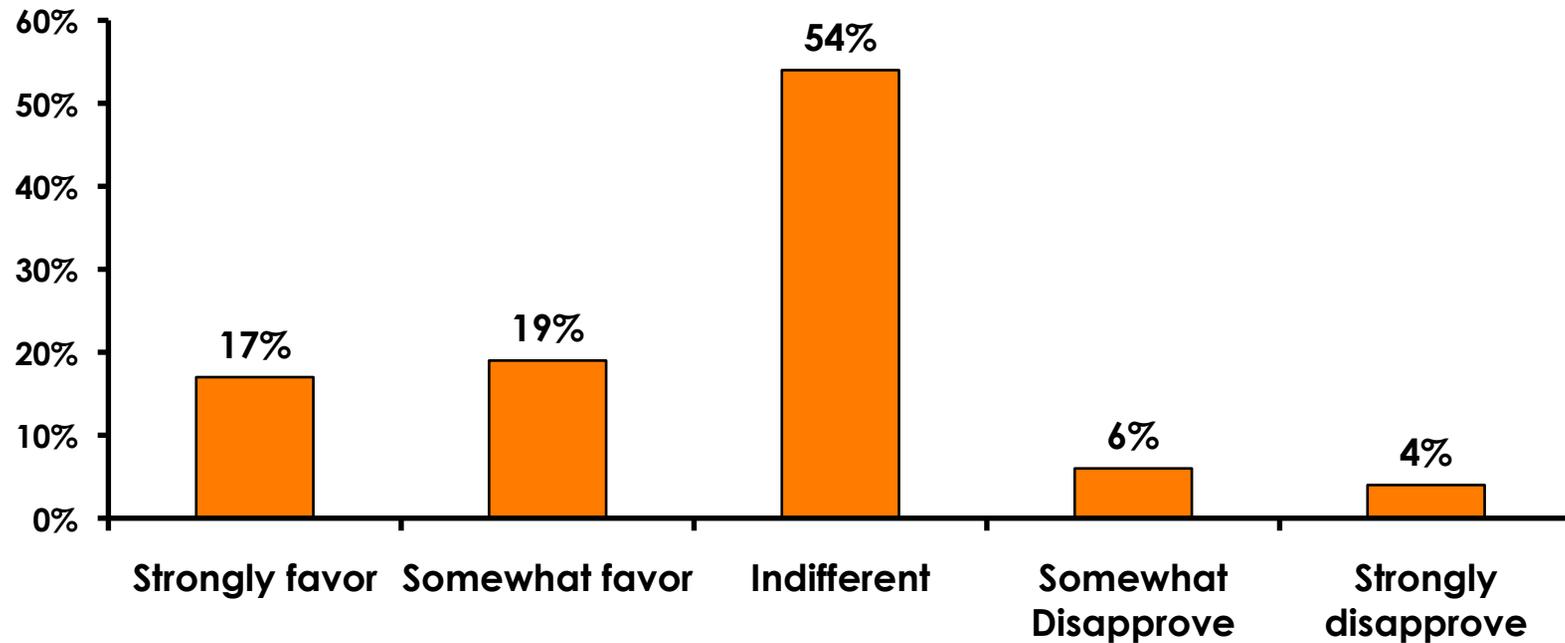
Concerns about travel outside of Japan - By Age & Income

| | AGE | | | | | PERSONAL INCOME | | | | | | | |
|---|-------|-------|-------|-------|-----|-----------------|-------------|-------------|-------------|-------------|---------|--------|----|
| | <20 | 20-29 | 30-39 | 40-49 | 50+ | <Y3.0M | Y3.0M-Y3.9M | Y4.0M-Y4.9M | Y5.0M-Y6.9M | Y7.0M-Y9.9M | Y10.0M+ | No Inc | |
| Q.26 | | | | | | | | | | | | | |
| Safety at my destination | 74% | 77% | 83% | 96% | 82% | 78% | 80% | 63% | 89% | 87% | 79% | 76% | |
| Terrorism | 47% | 47% | 49% | 73% | 59% | 43% | 46% | 56% | 55% | 58% | 52% | 69% | |
| Expense | 47% | 50% | 31% | 65% | 47% | 49% | 40% | 52% | 45% | 63% | 43% | 52% | |
| Food | 32% | 41% | 34% | 46% | 41% | 39% | 23% | 33% | 43% | 55% | 43% | 38% | |
| Other | 5% | 4% | 6% | 8% | | 6% | 3% | 7% | 4% | 3% | 7% | | |
| Spending money abroad when it should be spent at home | | 3% | | 8% | 6% | 4% | | 4% | 2% | 5% | 5% | 3% | |
| Do not know | 11% | 4% | | | | 6% | 3% | | | 3% | | 3% | |
| No concerns | | 2% | 3% | | 6% | 2% | 3% | 4% | | 5% | 5% | | |
| Total | Cases | 19 | 233 | 35 | 26 | 17 | 49 | 35 | 27 | 53 | 38 | 42 | 29 |

Security Screening/ Immigration Process at Guam International Airport



Increase Drinking Age to 21



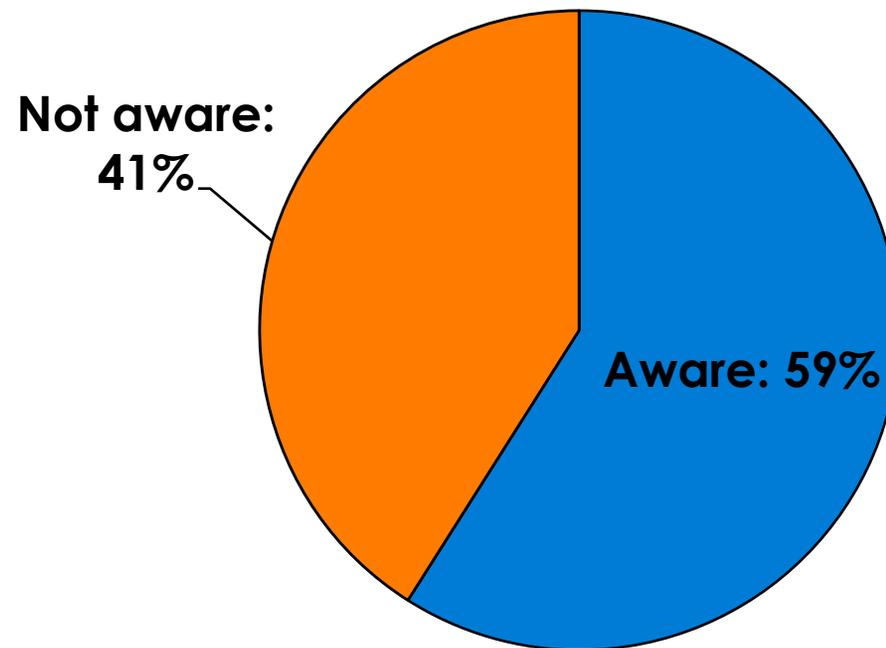
Increase Drinking Age to 21 by Gender & Age

| | | | GENDER | | AGE | | |
|--------|---------------------|-------|--------|--------|-------|-------|-------|
| | | | Male | Female | 18-34 | 35-54 | 55+ |
| Q.28.3 | Strongly Favor | Count | 30 | 24 | 43 | 7 | 4 |
| | | Col % | 18.1% | 15.0% | 15.8% | 15.9% | 40.0% |
| | Somewhat favor | Count | 31 | 32 | 44 | 16 | 3 |
| | | Col % | 18.7% | 20.0% | 16.2% | 36.4% | 30.0% |
| | Indifferent | Count | 87 | 88 | 156 | 17 | 2 |
| | | Col % | 52.4% | 55.0% | 57.4% | 38.6% | 20.0% |
| | Somewhat disapprove | Count | 10 | 11 | 17 | 4 | |
| | | Col % | 6.0% | 6.9% | 6.3% | 9.1% | |
| | Strongly disapprove | Count | 8 | 5 | 12 | | 1 |
| | | Col % | 4.8% | 3.1% | 4.4% | | 10.0% |
| Total | Count | | 166 | 160 | 272 | 44 | 10 |

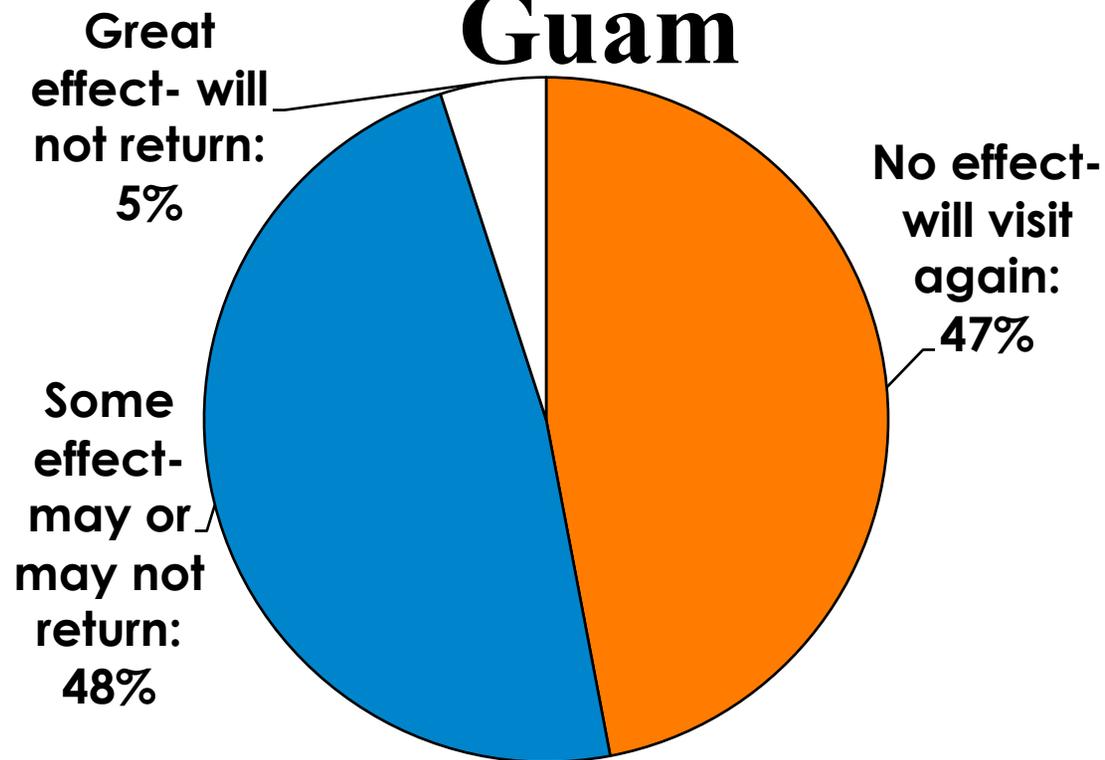
Hotel Room Surcharge by \$3.00/ Per day/ Per room, to help build Guam Museum

- Mean Rating – **3.4** out of possible 7.0
- Agree (Score 6-7) – **11%**
- Neutral (Score 4-5) – **49%**
- Disagree (Score 1-3) – **40%**

Awareness of U.S. Military troops moving from Japan to Guam



Effects of U.S. Military troop movement on future trips to Guam



Likelihood of travel outside of Japan within the next 6 to 24 months

