

GUAM VISITORS BUREAU Japan Visitor Tracker Exit Profile FY2014 JUNE 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

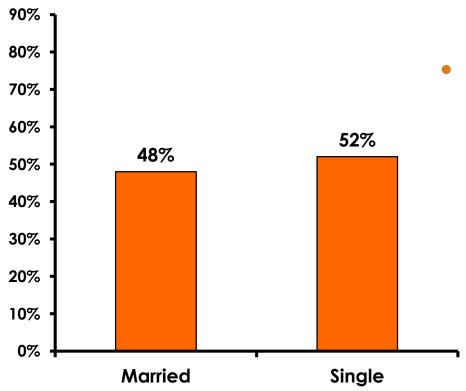
- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.



SECTION 1 PROFILE OF RESPONDENTS



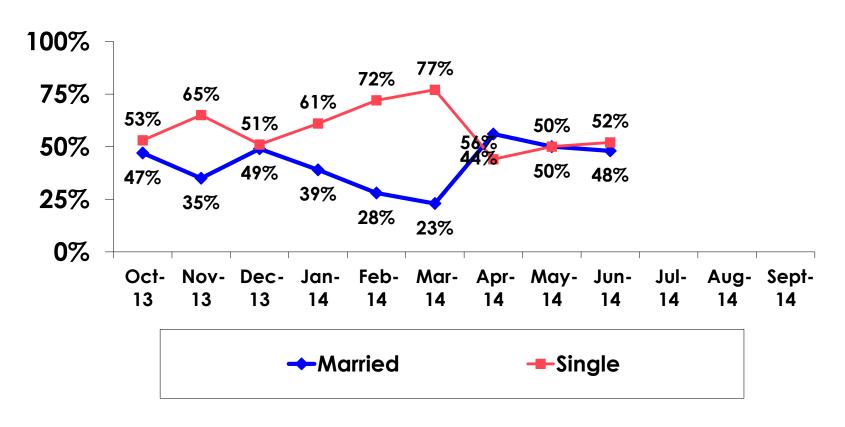
Marital Status - Overall



• 70% of female visitors are single.

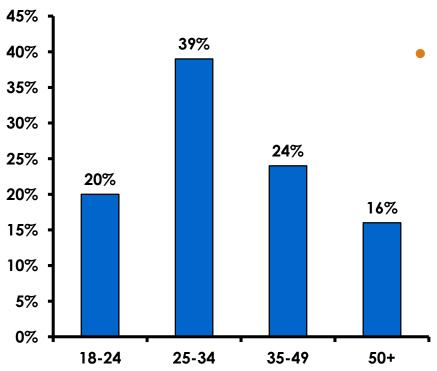


MARITAL STATUS





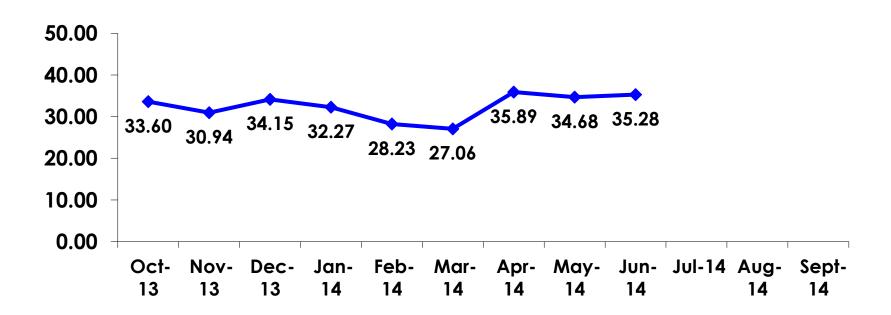
Age - Overall



The average age of the respondents is 35.28 years of age.

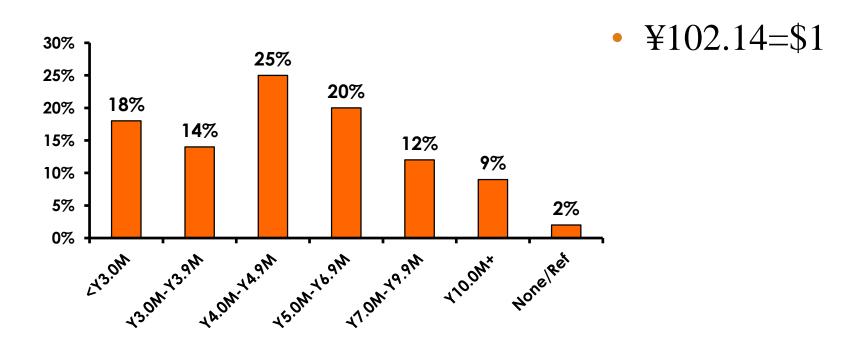


AVERAGE - AGE



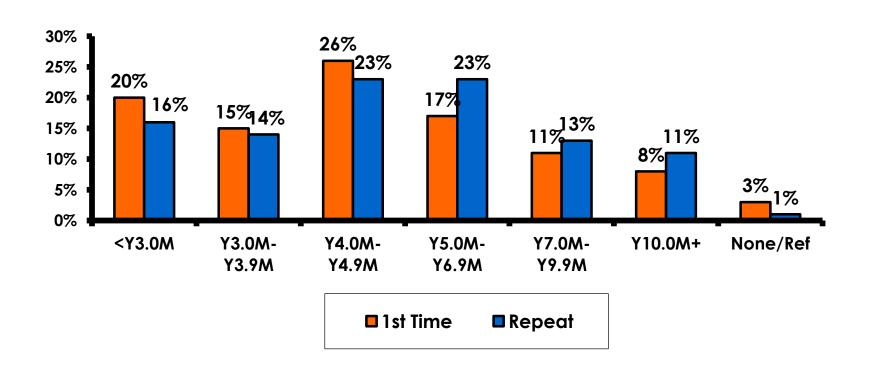


Personal Income





Personal Income – 1st time vs. repeat



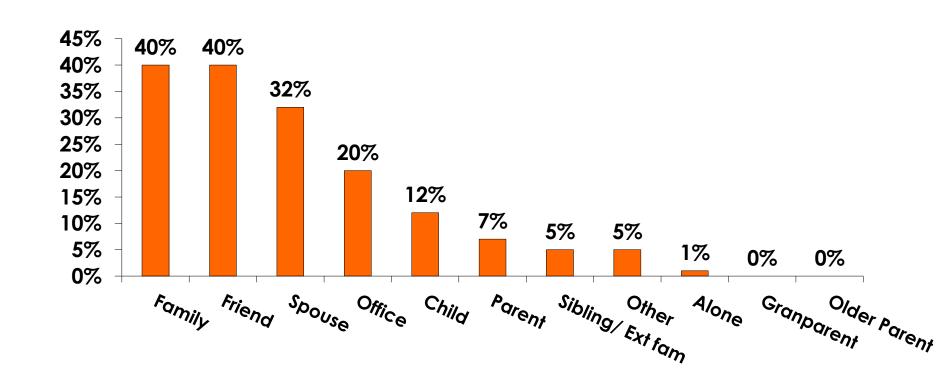


Personal Income by Gender & Age

			TOTAL	GEN	DER	AGE				
			-	Male	Female	18-24	25-34	35-49	50+	
Q26	<y2.0 million<="" td=""><td>Count</td><td>21</td><td>4</td><td>17</td><td>9</td><td>10</td><td>1</td><td>1</td></y2.0>	Count	21	4	17	9	10	1	1	
		Column N %	6%	2%	10%	14%	8%	1%	2%	
	Y2.0M-Y3.0M	Count	40	12	28	13	20	3	4	
		Column N %	12%	7%	17%	20%	15%	4%	7%	
	Y3.0M-Y4.0M	Count	48	21	27	9	18	10	11	
		Column N %	14%	12%	16%	14%	14%	12%	20%	
	Y4.0M-Y5.0M	Count	83	49	34	14	38	25	6	
		Column N %	25%	29%	20%	22%	29%	30%	11%	
	Y5.0M-Y7.0M	Count	67	39	28	7	20	23	17	
		Column N %	20%	23%	17%	11%	15%	27%	30%	
	Y7.0M-Y10.0M	Count	40	26	14	3	16	10	11	
		Column N %	12%	15%	8%	5%	12%	12%	20%	
	Y10.0M+	Count	32	17	15	5	9	12	6	
		Column N %	9%	10%	9%	8%	7%	14%	11%	
	No Income	Count	7	1	6	5	2			
		Column N %	2%	1%	4%	8%	2%			
	Total	Count	338	169	169	65	133	84	56	



Travel Companions

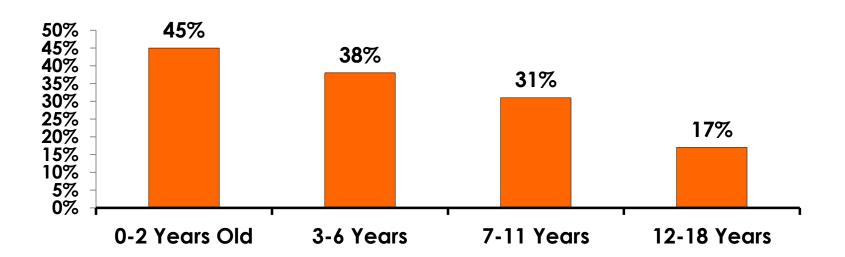




Number of Children Travel Party

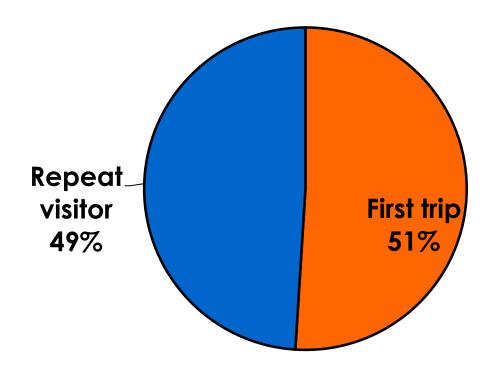
N=42 total respondents traveling with children.

(Of those N=42 respondents, there is a total of 61 children 18 years or younger)



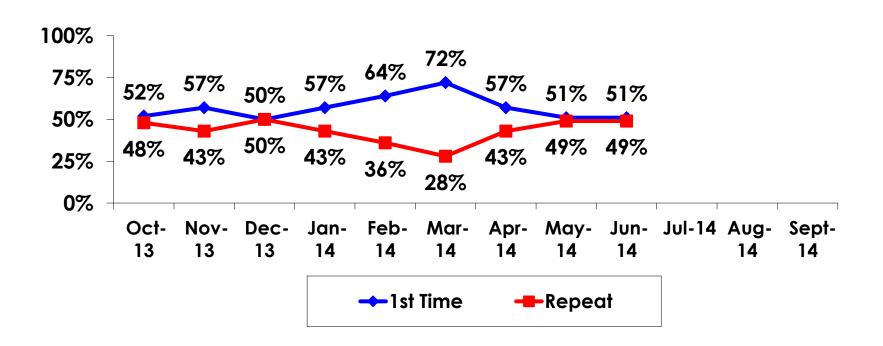


Prior Trips to Guam





PRIOR TRIPS TO GUAM





Trips to Guam by Age & Gender

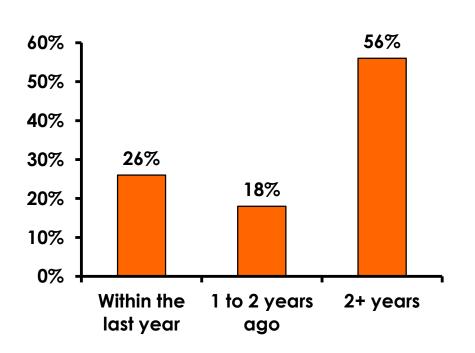
			TOTAL	TRIPS T	O GUAM
			1	1st	Repeat
GENDER	Male	Count	175	77	98
		Column N %	50%	43%	57%
	Female	Count	176	102	74
		Column N %	50%	57%	43%
	Total	Count	351	179	172
AGE	18-24	Count	71	47	24
		Column N %	20%	26%	14%
	25-34	Count	136	80	56
		Column N %	39%	45%	33%
	35-49	Count	85	30	55
		Column N %	24%	17%	32%
	50+	Count	57	21	36
		Column N %	16%	12%	21%
	Total	Count	349	178	171

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



Repeat Visitors Last Trip

$$n = 166$$

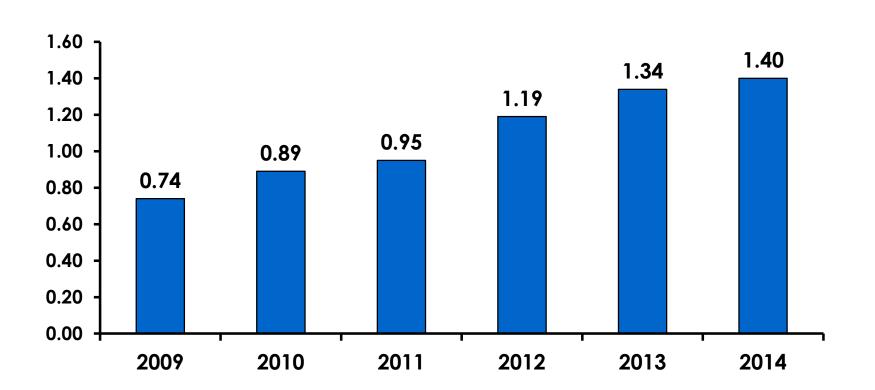


- The average repeat visitor has been to Guam 3.27 times.
- Half the repeat visitors have been to Guam within the last 2 years.



Average Number Overnight Trips

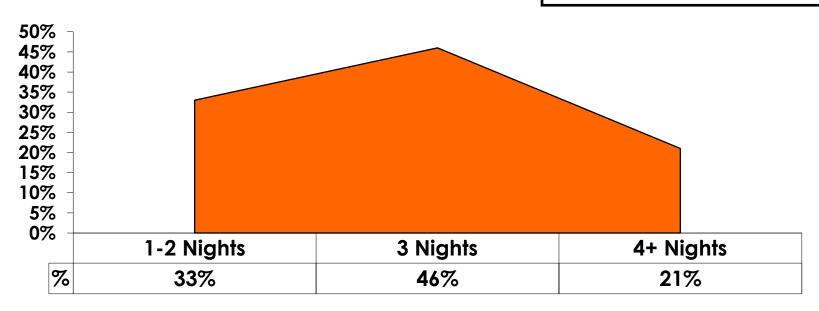
(2009-2014) (2 nights or more)





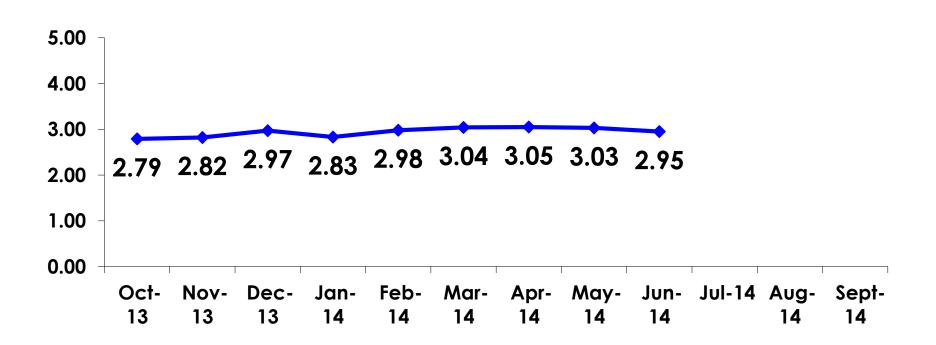
Length of Stay

Mean = 2.95 Days Median = 3.0 Days





AVG LENGTH OF STAY





Occupation by Income

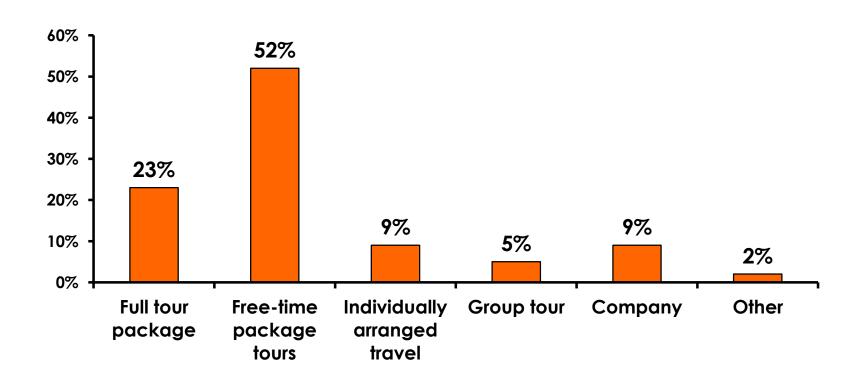
			TOTAL		Q26							
			-	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q25	Office worker non-mgr		23%	25%	23%	23%	22%	18%	33%	28%		
	Engineer		16%		18%	21%	24%	16%	8%	19%		
	Salesperson		15%	5%	13%	15%	20%	15%	10%	16%	14%	
	Homemaker		9%	5%	8%	10%	7%	12%	8%	9%	14%	
	Self-employed		8%	5%	3%	13%	6%	10%	10%	6%	14%	
	Manager		6%		5%	2%	7%	9%	10%	9%		
	Skilled worker		4%	5%	13%	4%	4%	6%				
	Freeter		4%	40%	3%		4%	1%				
	Student		3%	5%			1%	1%	8%		43%	
	Other		2%	10%	5%	2%	1%	1%			14%	
	Unemployed		2%			4%		6%	3%			
	Professional/ Specialist		2%		5%	2%	1%		5%			
	Retired		1%			4%	1%	1%	3%			
	Executive (30+ employees)		1%					1%	3%	9%		
	Free-lancer		1%							3%		
	Govt- office worker non- mgr		1%		5%				3%			
	Teacher		0%		3%							
	Govt- Executive		0%				1%					
	Total	Count	346	20	40	48	83	67	40	32	7	



SECTION 2 TRAVEL PLANNING



Travel Planning - Overall





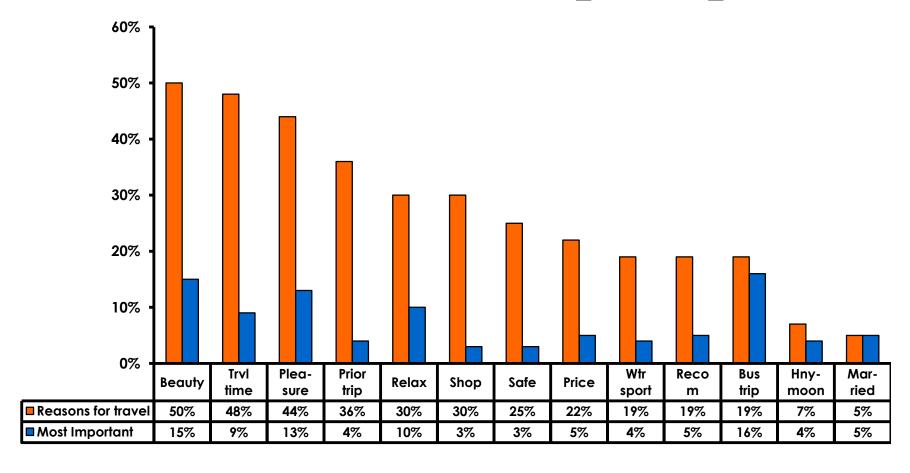
Accommodation by Income

Average length of stay: 2.95 days

			TOTAL	Q26							
			-	<y2.0 million<="" td=""><td>Y2.0M-Y3.0M</td><td>Y3.0M-Y4.0M</td><td>Y4.0M-Y5.0M</td><td>Y5.0M-Y7.0M</td><td>Y7.0M-Y10.0M</td><td>Y10.0M+</td><td>No Income</td></y2.0>	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		23%	43%	38%	21%	20%	13%	18%	28%	14%
	Outrigger Guam Resort		14%	5%	8%	13%	13%	13%	20%	19%	
	Guam Reef & Olive Spa		11%	14%	20%	13%	12%	6%	13%	3%	
	Grand Plaza Hotel		8%	14%	8%	4%	5%	4%	13%	13%	29%
	Fiesta Resort Guam		7%	5%	8%	4%	6%	12%	3%	9%	
	Hotel Nikko Guam		6%			4%	9%	9%	10%	6%	
	Onward Beach Resort		6%	10%	3%	6%	4%	10%	5%	9%	
	PIC Club		4%	5%	5%	2%	5%	4%	3%	3%	
	Hilton Guam Resort		3%		5%	6%	5%	4%			
	Hyatt Regency Guam		3%			2%	6%	1%	3%	6%	14%
	Westin Resort Guam		3%			6%	2%	4%		3%	14%
	Royal Orchid Guam		3%		3%	6%	1%	4%	3%		
	Holiday Resort Guam		3%			2%	4%	3%	5%		
	Ramada Suites Guam		2%				6%	1%	3%		14%
	Sheraton Laguna Guam		2%	5%	3%	4%	2%		3%		
	Leo Palace Resort		1%					4%	3%		
	Hotel Santa Fe		1%		3%	2%					
	Other		1%			2%					
	Pacific Bay Hotel		1%					1%			14%
	Tumon Bay Capital Hotel		0%			2%					
	Guam Marriott Resort		0%					1%			
	Total C	ount	350	21	40	48	82	67	40	32	7



Travel Motivation - Top Responses





Most Important Reason for Choosing Guam

- Business trip,
- Guam's natural beauty/ beaches,
- Pleasure
 are the primary reasons for visiting during this period.



Motivation by Age & Gender

			TOTAL		AG	GENDER			
			-	18-24	25-34	35-49	50+	Male	Female
Q5A	Natural beauty		50%	63%	51%	49%	30%	41%	58%
	Short travel time		48%	54%	50%	47%	39%	43%	53%
	Pleasure		44%	54%	47%	41%	28%	33%	54%
	Previous trip		36%	24%	32%	47%	42%	38%	33%
	Shopping		30%	39%	35%	25%	19%	21%	40%
	Relax		30%	34%	29%	32%	25%	28%	32%
	Safe		25%	21%	24%	25%	30%	25%	24%
	Price		22%	21%	25%	19%	23%	19%	26%
	Water sports		19%	25%	18%	18%	18%	18%	20%
	Recomm- friend/family/trvl agnt		19%	31%	18%	11%	19%	15%	23%
	Company/ Business Trip		19%	15%	15%	31%	11%	22%	15%
	Honeymoon		7%	4%	13%	4%		11%	3%
	Married/ Attn wedding		5%	1%	7%	6%	4%	7%	3%
	Golf		5%	1%	2%	4%	18%	7%	2%
	Scuba		4%	3%	5%	6%		3%	5%
	Other		3%	3%	4%	2%	2%	3%	3%
	Company Sponsored		3%	7%	1%	2%	2%	3%	2%
	Visit friends/ Relatives		2%	3%	1%	1%	7%	2%	2%
	Organized sports		1%			1%	5%		2%
	Total	Count	351	71	136	85	57	175	176



Motivation by Income

		TC	OTAL		Q26						
			-	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	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		50%	62%	58%	50%	45%	43%	48%	47%	71%
	Short travel time		48%	62%	45%	56%	45%	46%	48%	47%	29%
	Pleasure		44%	57%	48%	46%	37%	43%	38%	53%	43%
	Previous trip		36%	24%	35%	40%	33%	45%	38%	34%	29%
	Shopping		30%	33%	45%	33%	27%	28%	18%	31%	29%
	Relax		30%	38%	33%	17%	35%	30%	33%	25%	29%
	Safe		25%	29%	30%	25%	22%	27%	20%	22%	14%
	Price		22%	24%	25%	21%	23%	21%	25%	19%	29%
	Water sports		19%	10%	38%	19%	16%	18%	20%	19%	14%
	Recomm- friend/family/trvl agnt		19%	29%	30%	10%	16%	19%	20%	13%	14%
	Company/ Business Trip		19%	10%	10%	17%	25%	18%	18%	28%	
	Honeymoon		7%		3%	8%	5%	13%	10%	3%	14%
	Married/ Attn wedding		5%	5%	3%	2%	5%	10%	5%	6%	
	Golf		5%	5%		6%	2%	9%	3%	9%	
	Scuba		4%	10%	8%	2%	5%	1%	3%		14%
	Other		3%		8%		1%	3%	5%		29%
	Company Sponsored		3%			4%	4%	3%		9%	
	Visit friends/ Relatives		2%	5%	5%	2%	1%	3%	3%		
	Organized sports		1%		3%	2%		1%		3%	
	Total Co	unt	351	21	40	48	83	67	40	32	7



SECTION 3 EXPENDITURES

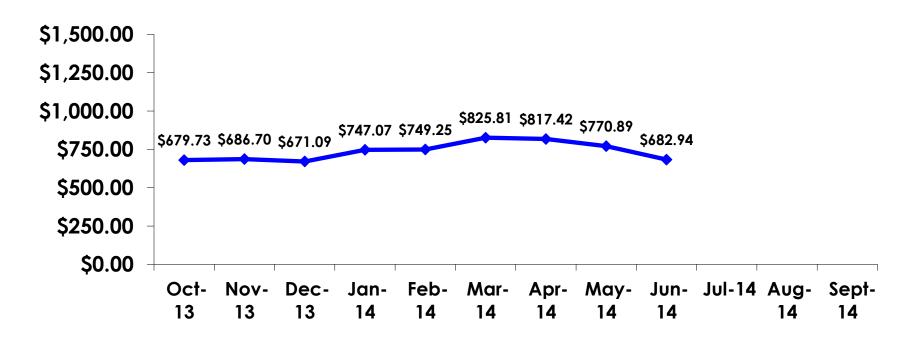


Prepaid Expenditures ¥102.14/US\$1

- \$1,475.20 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$39,162 = maximum (highest amount recorded for the entire sample)
- \$682.94 = overall mean average <u>per person</u> prepaid expenditures



PREPAID EXPENDITURES Per Person





Breakdown of Prepaid Expenditures ¥102.14=\$1

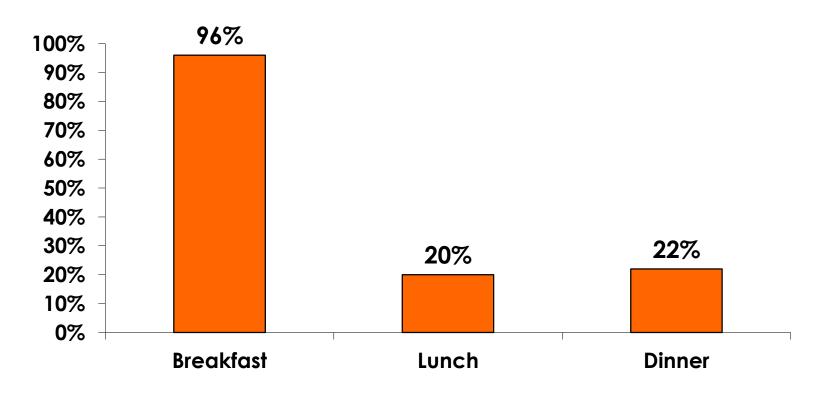
(Filter: Only those who responded/ Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,307.59
Air & Accommodation w/ daily meal package	\$3,158.65
Air only	\$919.38
Accommodation only	\$607.01
Accommodation w/ daily meal only	\$195.81
Food & Beverages in Hotel	\$253.42
Ground transportation – Japan	\$90.59
Ground transportation – Guam	\$68.49
Optional tours/ activities	\$522.53
Other expenses	\$455.41
Total Prepaid	\$1,475.20



PREPAID MEAL BREAKDOWN

Air/Accommodations with Daily Meal Pkg. n=46

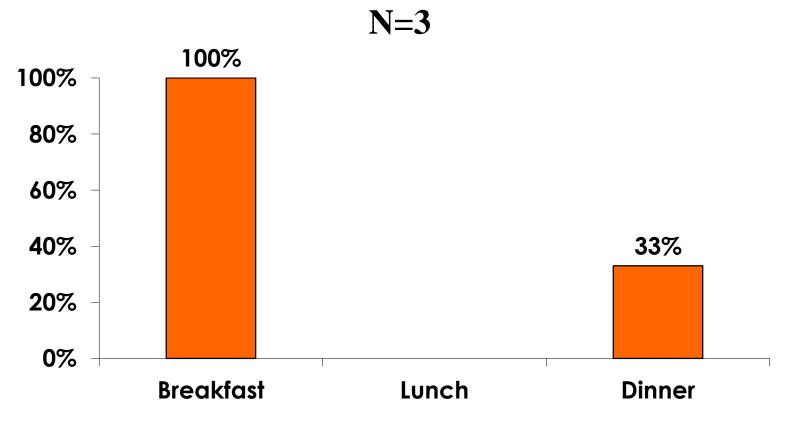


Mean=\$3,158.65 per travel party



PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

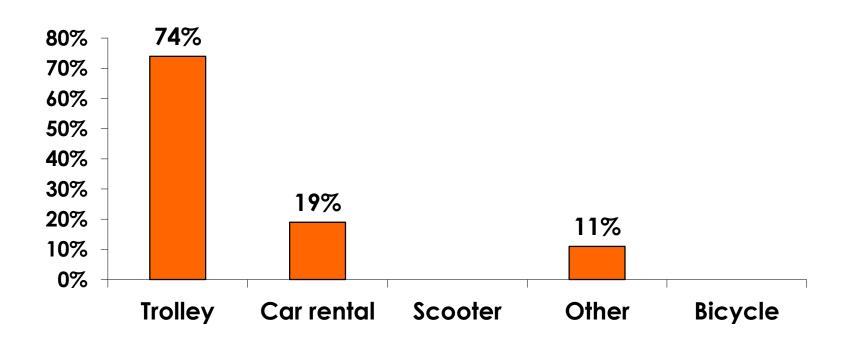


Mean=\$195.81 per travel party



PREPAID GROUND TRANSPORTATION

n=27



Mean=\$68.49 per travel party

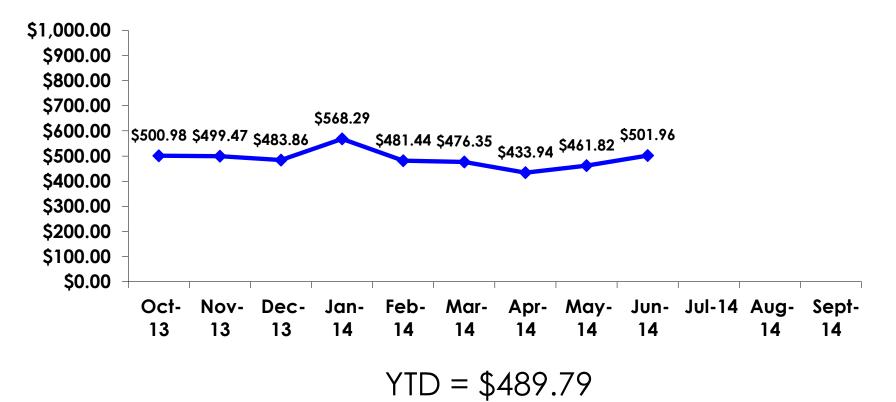


On-Island Expenditures

- \$772.65 = 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)
- \$501.96 = overall mean average <u>per person</u> onisland expenditure



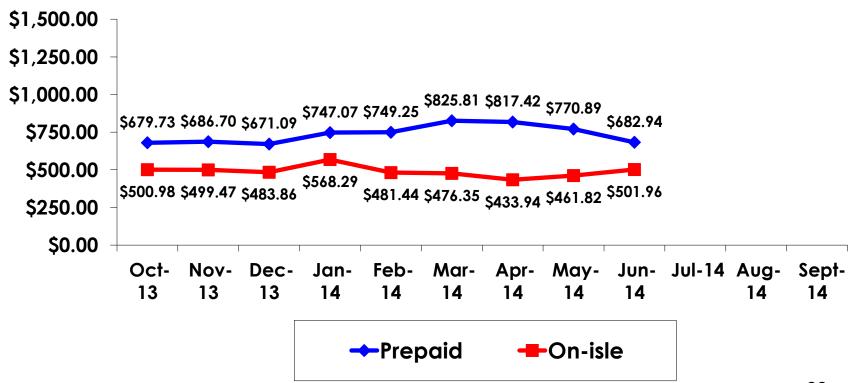
ON-ISLAND EXPENDITURES Per Person





PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$736.74 On-Isle YTD = \$489.79





Total On-Island Expenditure by Gender & Age

TOTAL			GEN	GENDER GENDER								
						Ma	le		Female			
						AG	E		AGE			
- Male Female		18-24	25-34	35-49	50+	18-24	25-34	35-49	50+			
PER PERSON	Mean	\$501.96	\$504.66	\$499.28	\$536.54	\$477.87	\$517.41	\$537.76	\$538.83	\$502.28	\$407.06	\$512.21
	Median	\$400	\$350	\$400	\$600	\$400	\$325	\$380	\$400	\$400	\$400	\$436
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$110	\$0	\$0	\$100	\$150
	Maximum	\$2,500	\$2,500	\$1,600	\$1,000	\$2,500	\$2,500	\$2,000	\$1,600	\$1,500	\$1,000	\$1,500



On-Island Expenditure Categories by Gender & Age

		TOTAL	GEN	DER		AG	Ε	
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$41.30	\$52.83	\$29.83	\$26.45	\$37.34	\$37.46	\$75.54
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$10
F&B FF/STORE	Mean	\$27.83	\$32.58	\$23.10	\$19.65	\$30.72	\$26.85	\$31.79
	Median	\$9	\$8	\$10	\$ 5	\$10	\$10	\$ 5
F&B RESTRNT	Mean	\$86.45	\$118.69	\$54.39	\$40.90	\$82.99	\$138.52	\$75.95
	Median	\$17	\$30	\$10	\$10	\$30	\$30	\$10
OPT TOUR	Mean	\$81.87	\$111.84	\$52.07	\$72.35	\$58.62	\$86.67	\$144.91
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$163.68	\$183.80	\$143.66	\$147.10	\$184.34	\$173.66	\$124.12
	Median	\$50	\$10	\$ 55	\$50	\$50	\$50	\$0
GIFT- OTHER	Mean	\$138.77	\$158.34	\$119.32	\$98.61	\$151.18	\$137.45	\$157.28
	Median	\$72	\$50	\$90	\$50	\$80	\$60	\$100
TRANS	Mean	\$19.80	\$26.54	\$13.10	\$11.45	\$18.76	\$38.07	\$6.11
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$207.10	\$226.39	\$187.91	\$232.85	\$158.85	\$228.35	\$263.95
	Median	\$0	\$0	\$0	\$10	\$0	\$0	\$0
TOTAL	Mean	\$772.65	\$924.45	\$621.72	\$648.93	\$722.81	\$859.81	\$927.02
	Median	\$505	\$650	\$500	\$550	\$500	\$640	\$600



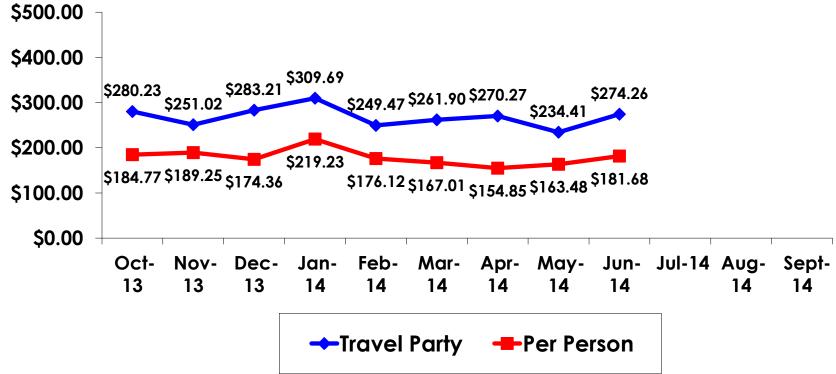
On-Island Expenditures First Timers & Repeaters

		TOTAL	TRIPS T	O GUAM
		1	1st	Repeat
F&B HOTEL Mean		\$41.30	\$30.77	\$52.26
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$27.83	\$26.67	\$29.03
	Median	\$9	\$9	\$10
F&B RESTRNT	Mean	\$86.45	\$62.59	\$111.28
	Median	\$17	\$10	\$25
OPT TOUR	Mean	\$81.87	\$91.73	\$71.60
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$163.68	\$149.07	\$178.87
	Median	\$50	\$50	\$20
GIFT- OTHER	Mean	\$138.77	\$130.45	\$147.44
	Median	\$72	\$100	\$55
TRANS	Mean	\$19.80	\$15.51	\$24.26
	Median	\$0	\$0	\$0
OTHER	Mean	\$207.10	\$187.96	\$227.01
	Median	\$0	\$0	\$0
TOTAL	Mean	\$772.65	\$696.64	\$851.76
	Median	\$505	\$500	\$653



ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$268.24 Per Person YTD = \$178.94



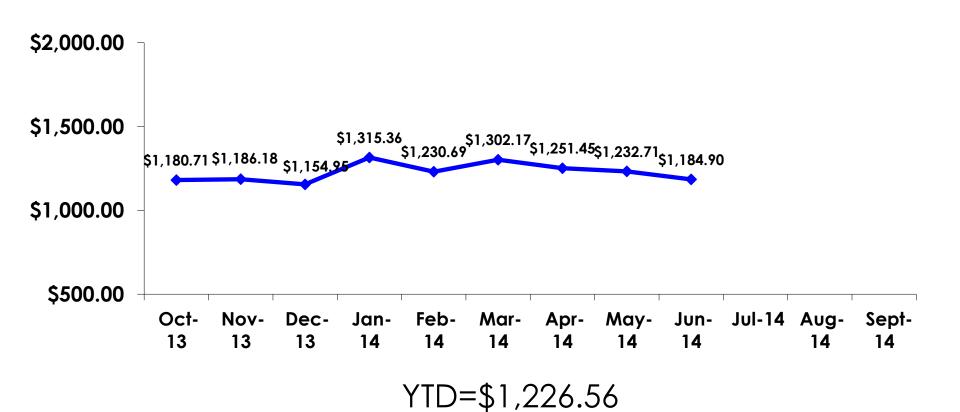


Total Expenditures Per Person (Prepaid & On-Island)

- \$1,184.90 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,997 = Maximum (highest amount recorded for the entire sample)



TOTAL EXPENDITURES Per Person





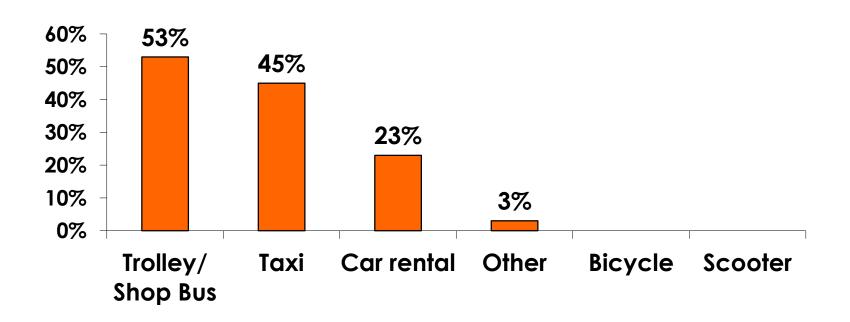
Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$41.30
Food & beverage in fast food restaurant/convenience store	\$27.83
Food & beverage at restaurants or drinking establishments outside a hotel	\$86.45
Optional tours and activities	\$81.87
Gifts/souvenirs for yourself/companions	\$163.68
Gifts/ souvenirs for friends/family at home	\$138.77
Local transportation	\$19.80
Other expenses not covered	\$207.10
Average Total	\$772.65



Local Transportation





Mean=\$19.80 per travel party



Guam Airport Expenditures

- \$28.58 = Mean
- \$10 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$500 = Maximum (highest amount recorded for the entire sample)



Breakdown of Airport Expenditures

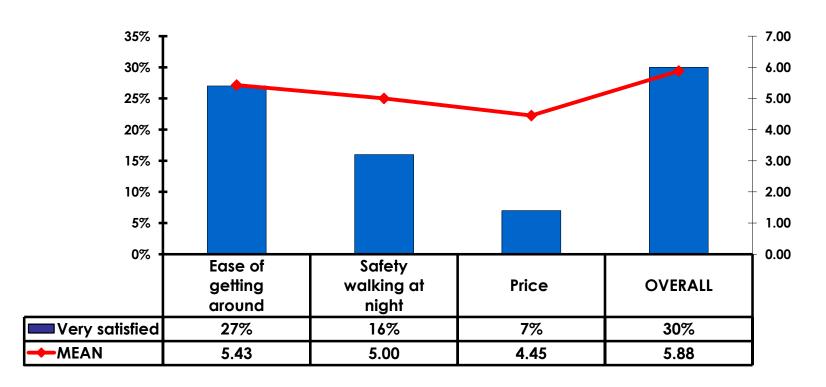
	MEAN \$
Food & Beverages	\$8.40
Gifts/Souvenirs Self	\$7.84
Gifts/Souvenirs Others	\$12.28
Total	\$28.58



SECTION 4 VISITOR SATISFACTION

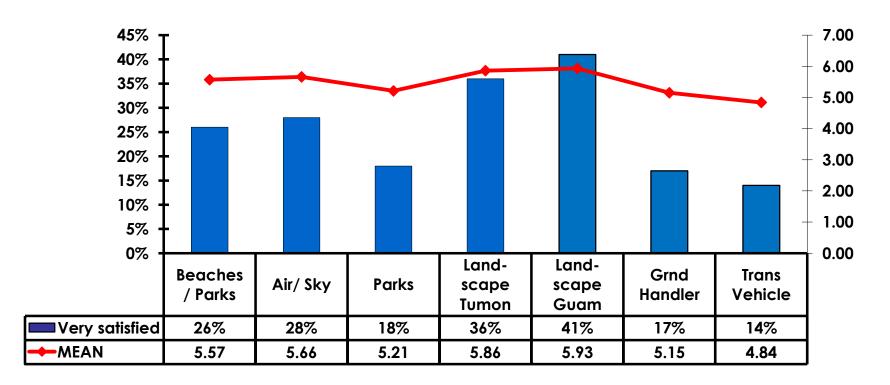


Satisfaction Scores Overall



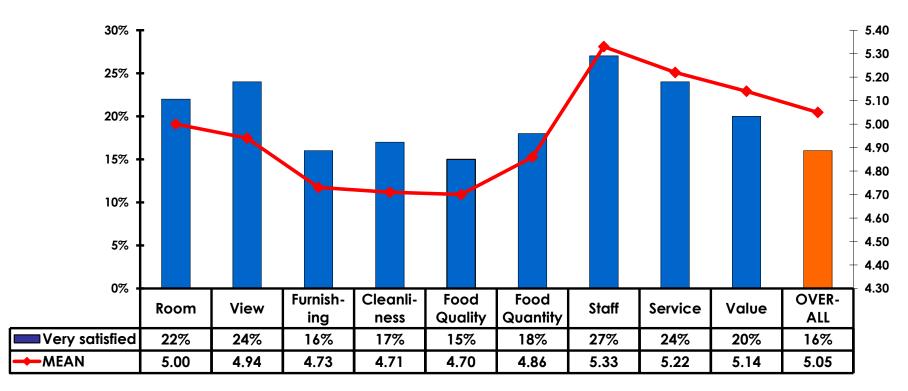


Satisfaction Quality/ Cleanliness



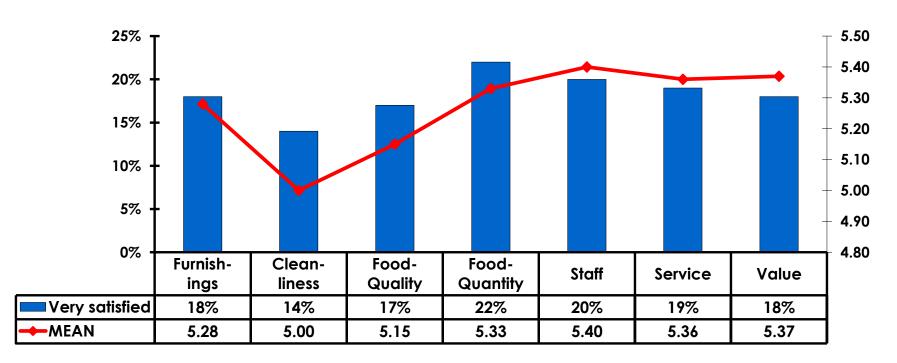


Quality of Accommodations



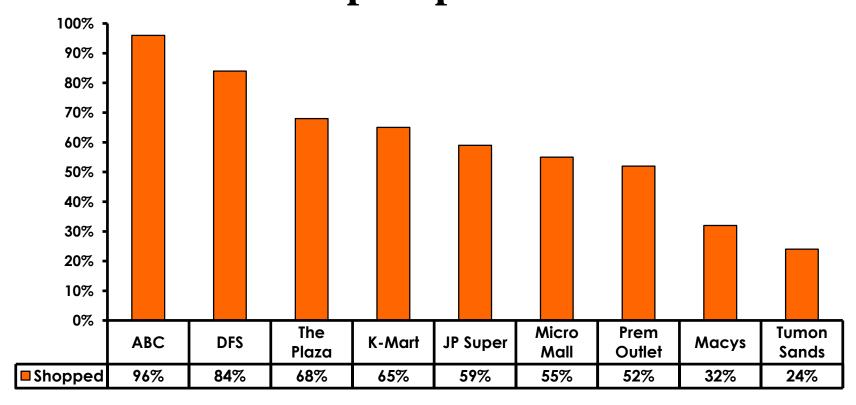


Quality of Dining Experience





Visits to Shopping Centers/Malls on Guam Top responses



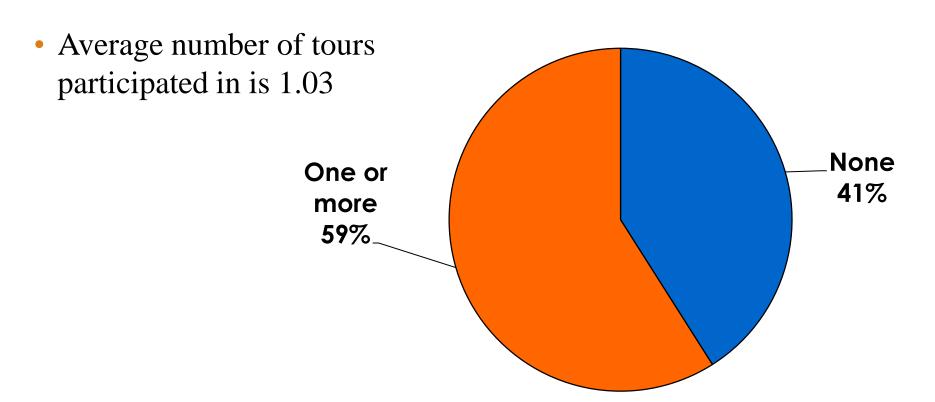


Satisfaction with Shopping

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 45%	Score of 6 to 7 = 45 %
Score of 4 to 5 = 59%	Score of 4 to 5 = 45 %
Score 1 to 3 = 5 %	Score 1 to 3 = 10%
MEAN = 5.19	MEAN = 5.11

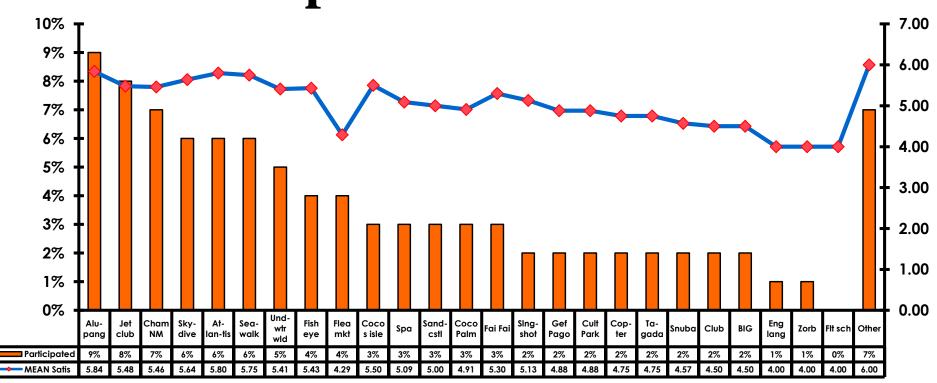


Optional Tour Participation





Optional Tours Participation & Satisfaction





Day Tours Satisfaction

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 51%	Score of 6 to 7 = 47%
Score of 4 to 5 = 47%	Score of 4 to 5 = 50%
Score 1 to 3 = 3 %	Score 1 to 3 = 3 %
MEAN = 5.33	MEAN = 5.23

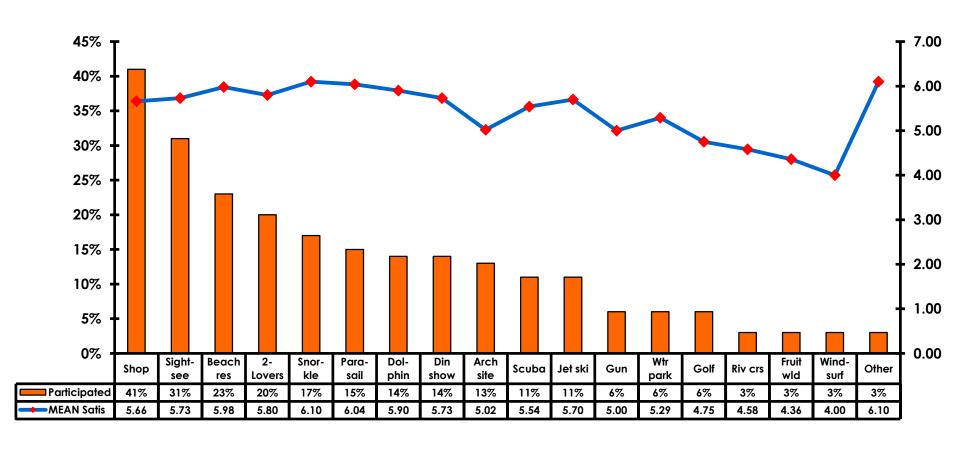


Night Tours Satisfaction

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 21%	Score of 6 to 7 = 19%
Score of 4 to 5 = 77%	Score of 4 to 5 = 78 %
Score 1 to 3 = 3 %	Score 1 to 3 = 2 %
MEAN = 4.51	MEAN = 4.48

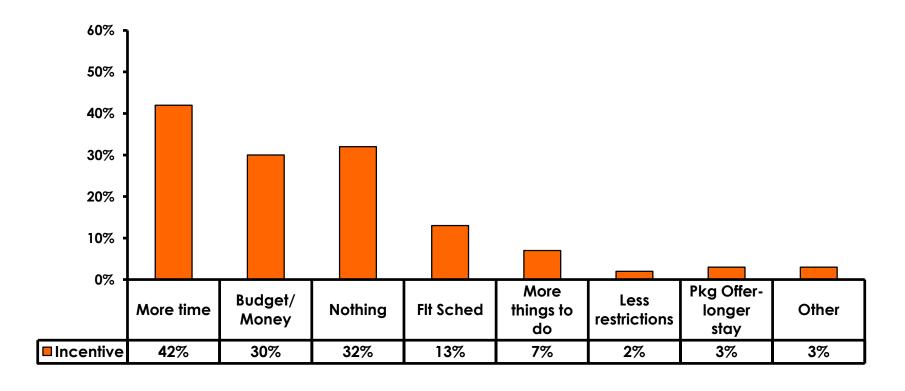


Satisfaction with Other Activities





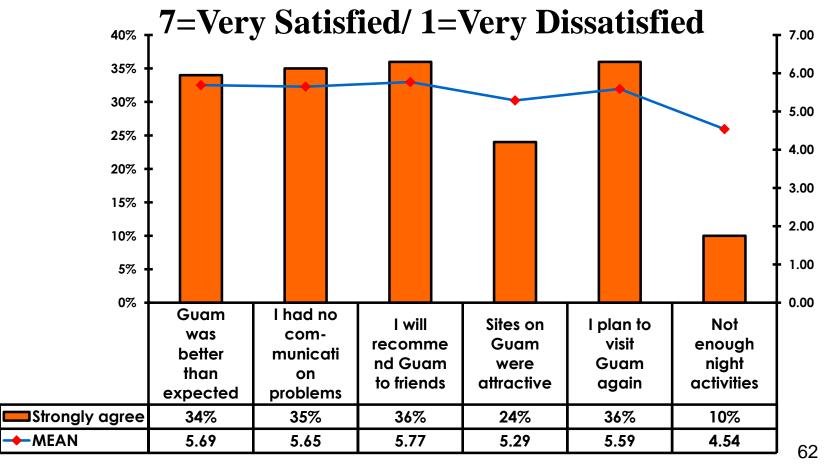
What would it take to make you want to stay an extra day in Guam?





On-Island Perceptions

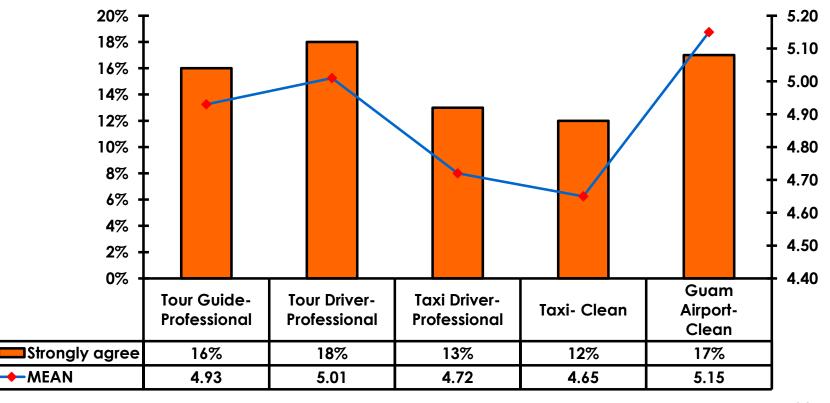






On-Island Perceptions

7pt Rating Scale 7=Very Satisfied/ 1=Very Dissatisfied

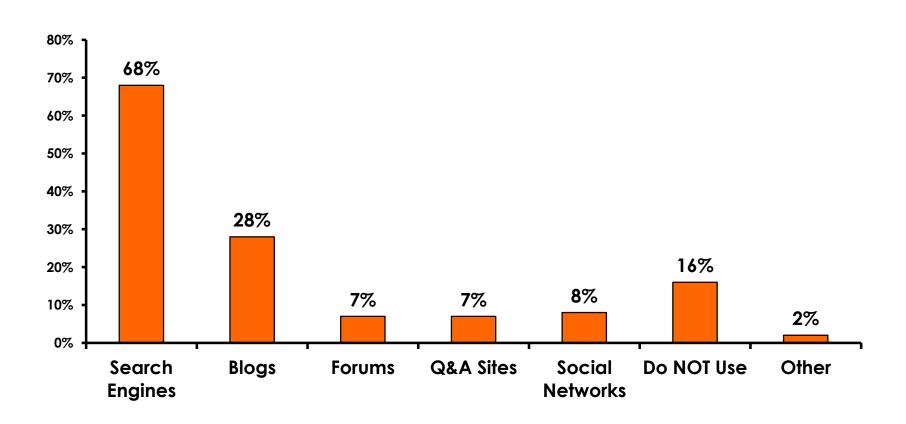




SECTION 5 PROMOTIONS

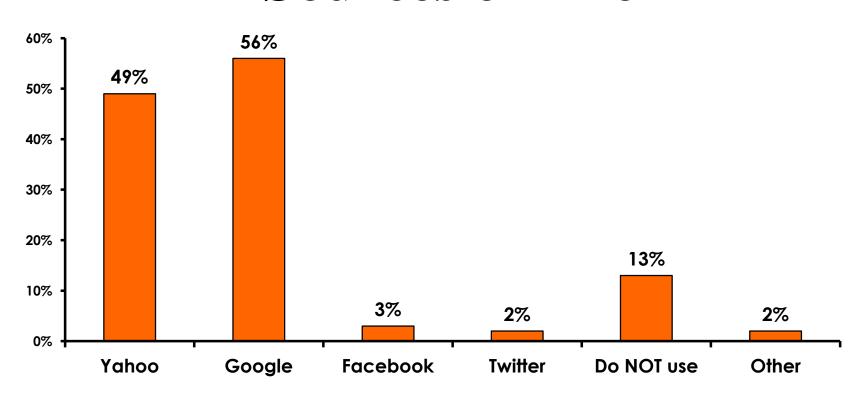


Internet- Guam Sources of Info



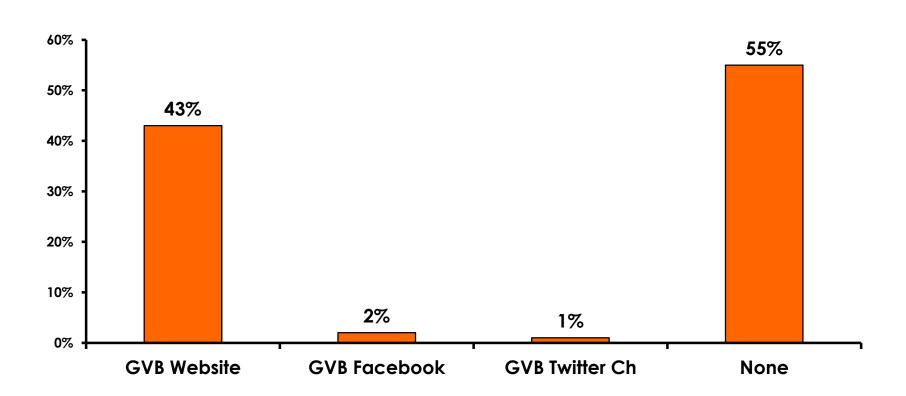


Internet- Things To Do Sources of Info



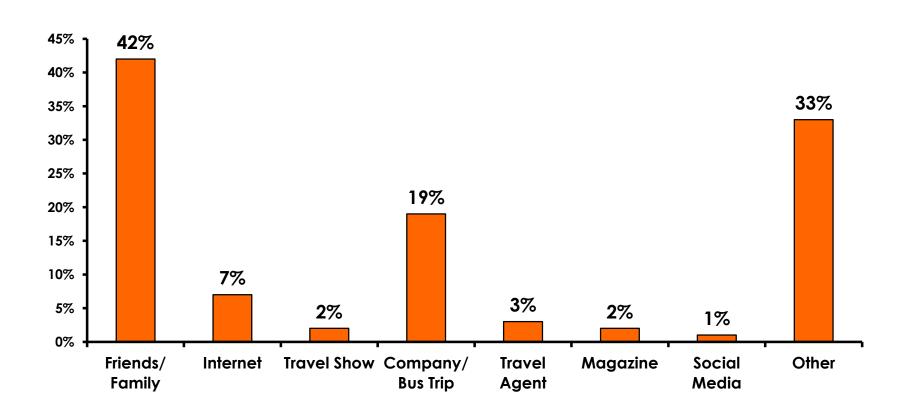


Internet- GVB Sources



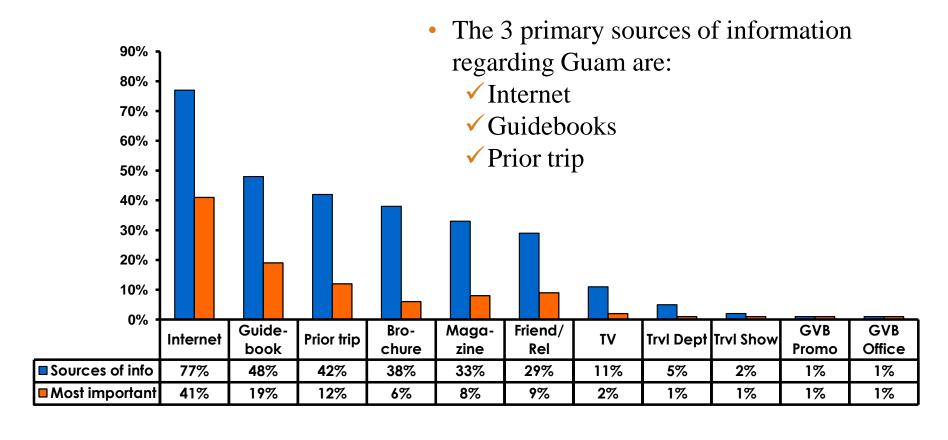


Travel Motivation-Info Sources



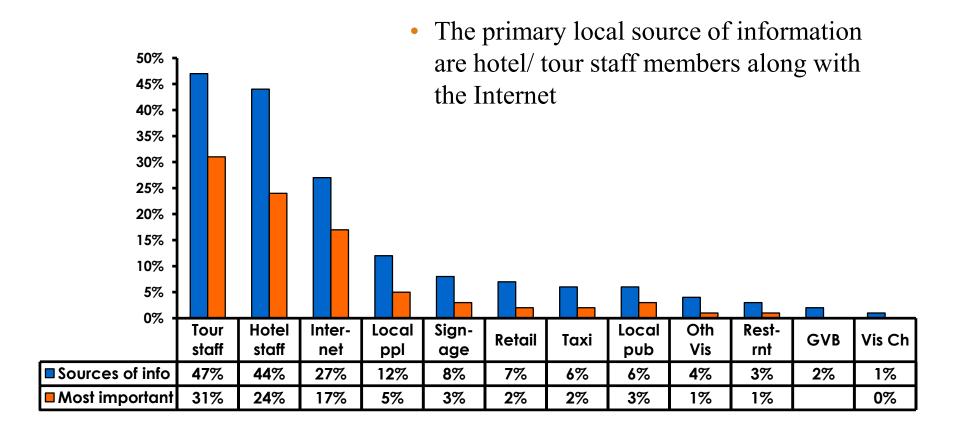


Sources of Information Pre-arrival





Sources of Information Post-arrival

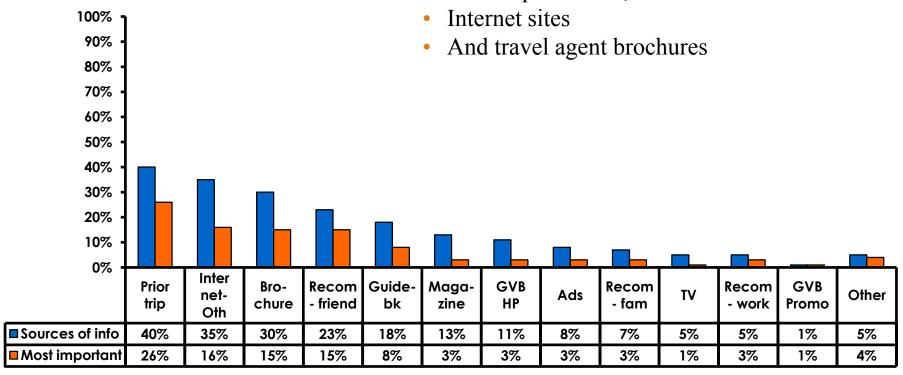




Sources of Information - Motivation

The primary motivational sources of information were.

• Prior trip to Guam,

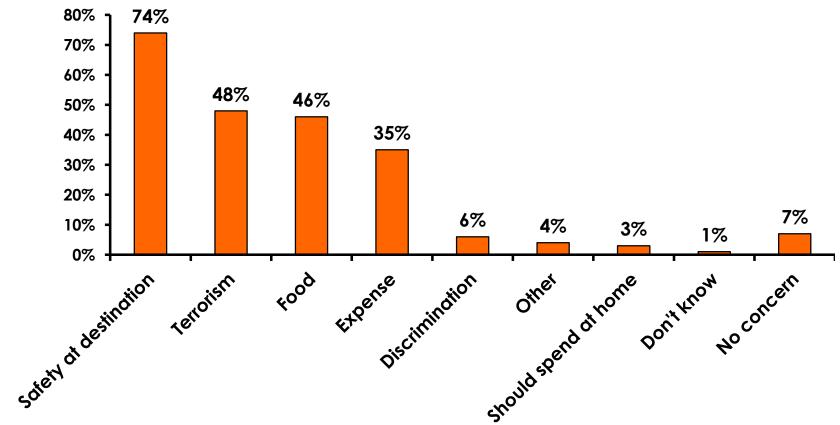




SECTION 6 OTHER ISSUES



Concerns about travel outside of Japan - Overall



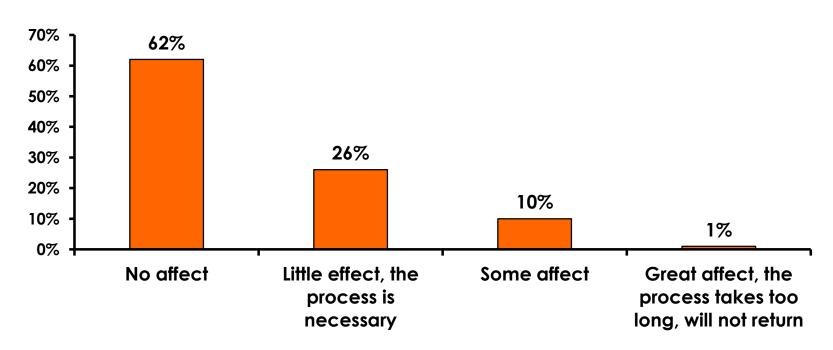


Concerns about travel outside of Japan - By Age & Income

	TOTAL				AG	E					Q26				
		-	-	18-24	25-34	35-49	50+	<y2.0 million<="" td=""><td>Y2.0M-Y3.0M</td><td>Y3.0M-Y4.0M</td><td>Y4.0M-Y5.0M</td><td>Y5.0M-Y7.0M</td><td>Y7.0M-Y10.0M</td><td>Y10.0M+</td><td>No Income</td></y2.0>	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	7	74%	73%	74%	78%	68%	62%	88%	81%	70%	69%	73%	72%	86%
	Terrorism	4	48%	44%	51%	47%	51%	52%	53%	44%	52%	46%	48%	41%	71%
	Food	4	46%	45%	48%	51%	37%	38%	45%	40%	51%	52%	53%	38%	29%
	Expense	3	35%	44%	36%	33%	25%	29%	40%	29%	36%	33%	38%	38%	43%
	No concerns		7%	6%	9%	6%	7%	10%	3%	6%	7%	10%	8%	9%	
	Discrimination against Japanese		6%	13%	5%	5%	4%	10%	8%	8%	4%	7%	3%		57%
	Other		4%	6%	4%	4%	4%	5%	8%	6%	2%	3%		9%	
	Should spend at home		3%	4%	4%	1%	2%		10%	4%	2%	1%			
	Don't know		1%	1%	1%	2%	2%			4%		1%			
	Total C	ount	351	71	136	85	57	21	40	48	83	67	40	32	7



Security Screening/Immigration Process at Guam International Airport





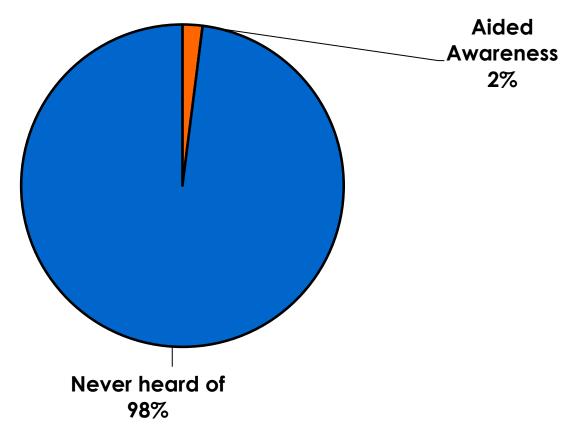
Airport Screening

7pt Rating Scale





Shop Guam Festival





Shop Guam Festival - Impact n=7

