

GUAM VISITORS BUREAU Japan Visitor Tracker Exit Profile FY2015 MARCH 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

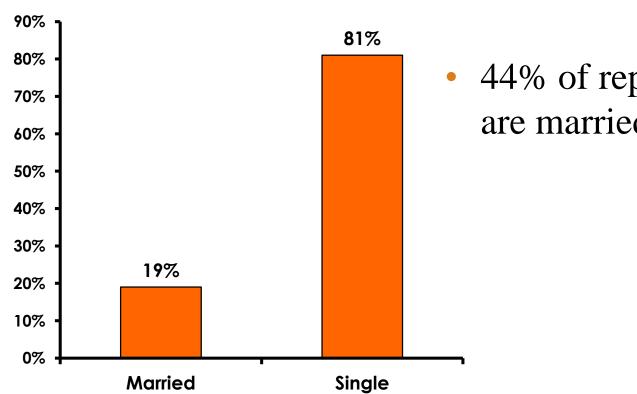
- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction,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



SECTION 1 PROFILE OF RESPONDENTS



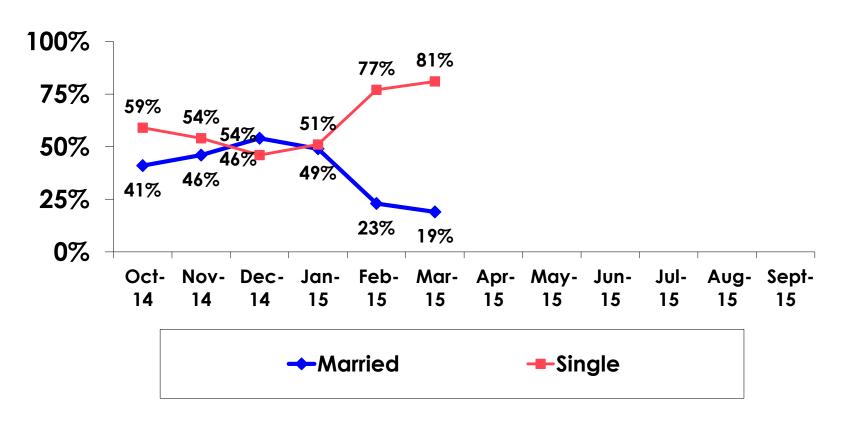
Marital Status - Overall



• 44% of repeat visitors are married.

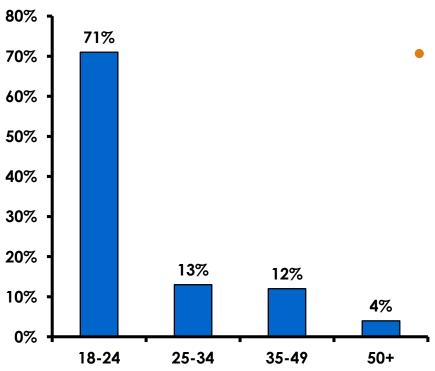


MARITAL STATUS





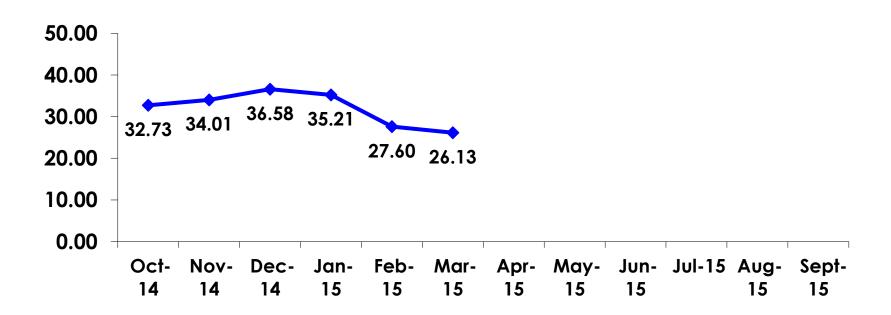
Age - Overall



• The average age of the respondents is 26.13 years of age.

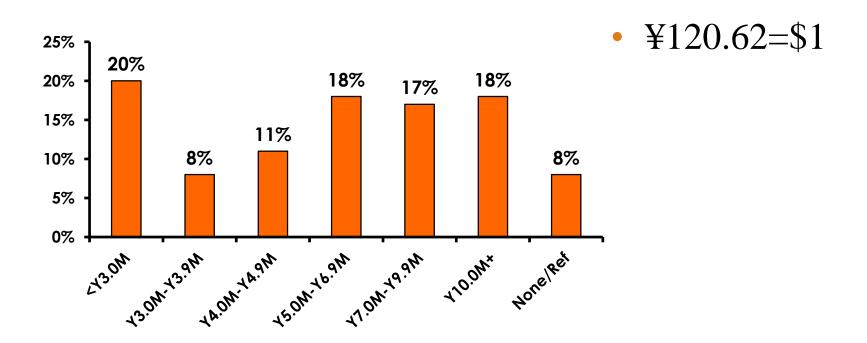


AVERAGE - AGE



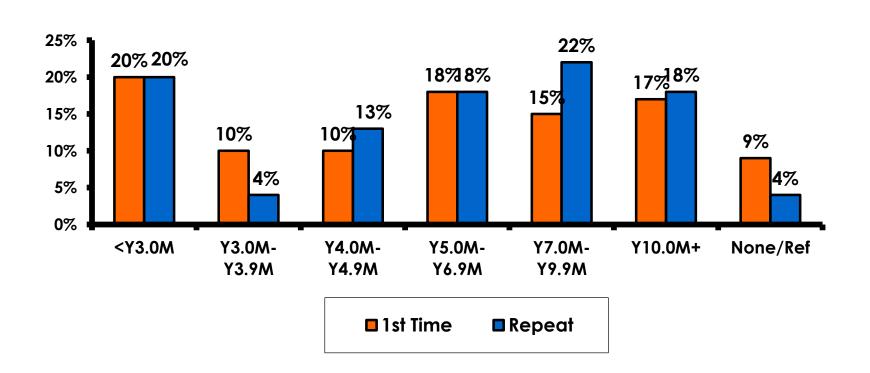


Personal Income





Personal Income – 1st time vs. repeat



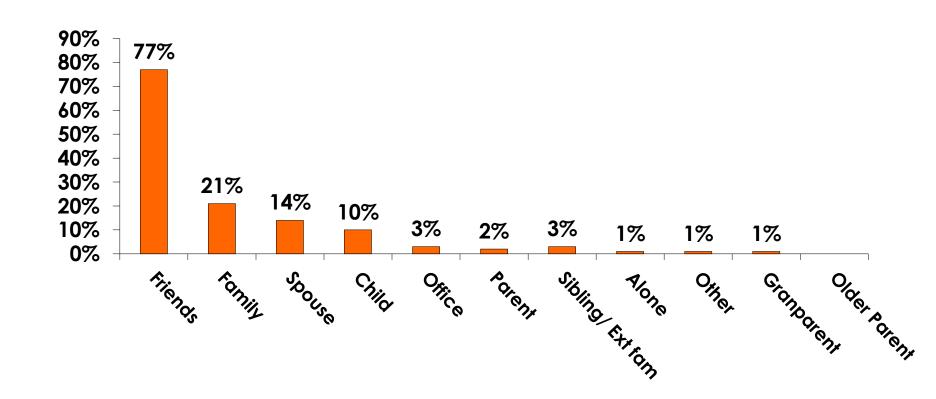


Personal Income by Gender & Age

			TOTAL	GEN	DER		AGE					
			-	Male	Female	18-24	25-34	35-49	50+			
Q26	<y2.0 million<="" td=""><td>Count</td><td>32</td><td>16</td><td>16</td><td>25</td><td>6</td><td>1</td><td></td></y2.0>	Count	32	16	16	25	6	1				
		Column N %	11%	10%	12%	13%	15%	2%				
	Y2.0M-Y3.0M	Count	26	14	12	21	4		1			
		Column N %	9%	9%	9%	11%	10%		8%			
	Y3.0M-Y4.0M	Count	24	9	15	14	7	3				
		Column N %	8%	6%	11%	7%	18%	7%				
	Y4.0M-Y5.0M	Count	32	14	18	21	7	4				
		Column N %	11%	9%	13%	11%	18%	10%				
	Y5.0M-Y7.0M	Count	52	31	21	27	9	13	3			
		Column N %	18%	20%	16%	14%	23%	32%	23%			
	Y7.0M-Y10.0M	Count	48	24	24	26	4	13	5			
		Column N %	17%	16%	18%	13%	10%	32%	38%			
	Y10.0M+	Count	51	34	17	37	2	7	4			
		Column N %	18%	22%	13%	19%	5%	17%	31%			
	No Income	Count	23	11	12	23						
		Column N %	8%	7%	9%	12%						
	Total	Count	288	153	135	194	39	41	13			



Travel Companions

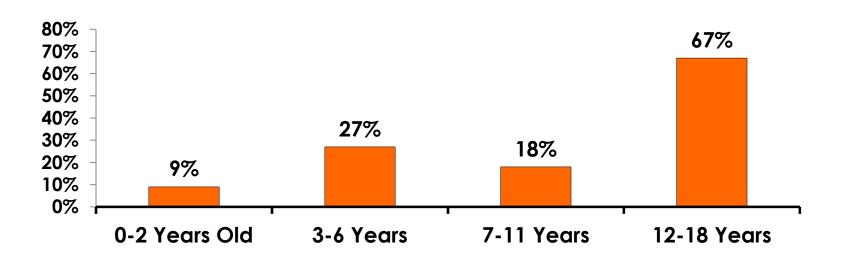




Number of Children Travel Party

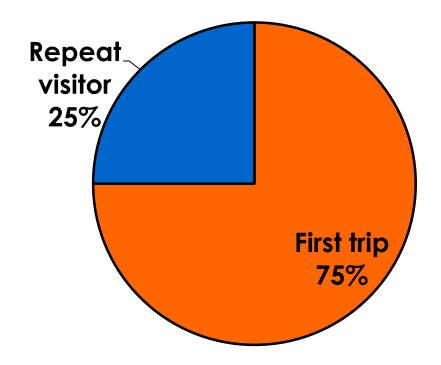
N=33 total respondents traveling with children.

(Of those N=33 respondents, there is a total of 45 children 18 years or younger)



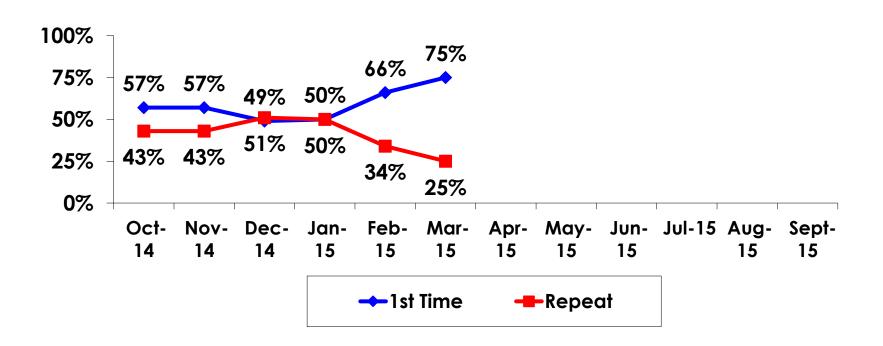


Prior Trips to Guam





PRIOR TRIPS TO GUAM





Trips to Guam by Age & Gender

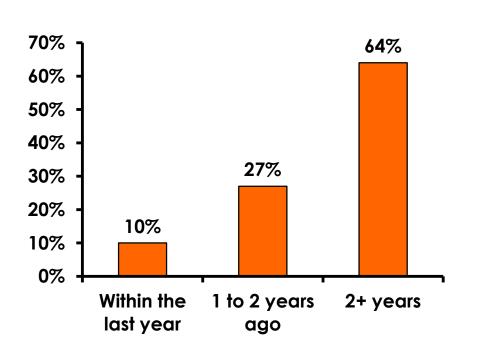
	_		TOTAL	TRIPS T	O GUAM
			-	1st	Repeat
GENDER	Male	Count	177	133	44
		Column N %	50%	50%	50%
	Female	Count	175	131	44
		Column N %	50%	50%	50%
	Total	Count	352	264	88
AGE	18-24	Count	249	214	35
		Column N %	71%	82%	40%
	25-34	Count	45	29	16
		Column N %	13%	11%	18%
	35-49	Count	42	15	27
		Column N %	12%	6%	31%
	50+	Count	13	3	10
		Column N %	4%	1%	11%
	Total	Count	349	261	88

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



Repeat Visitors Last Trip

$$n = 83$$

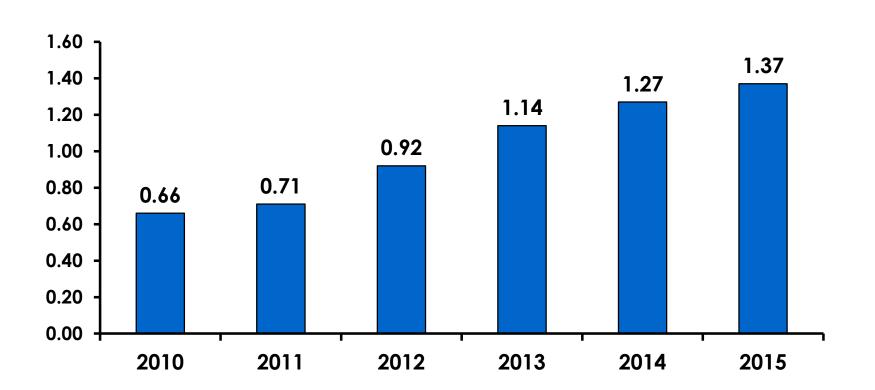


- The average repeat visitor has been to Guam 3.43 times.
- Less than half of repeat visitors have been to Guam within the last 2 years.



Average Number Overnight Trips

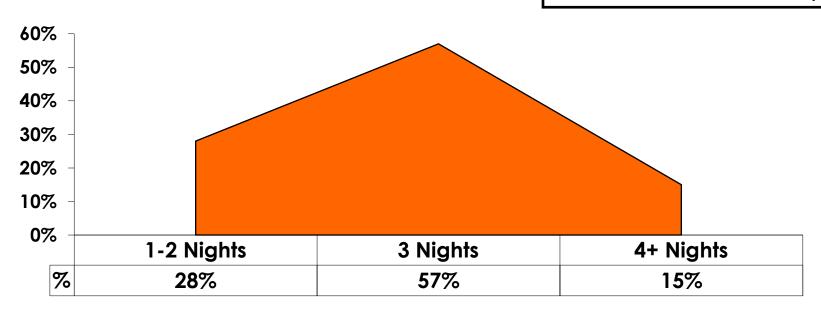
(2010-2015) (2 nights or more)





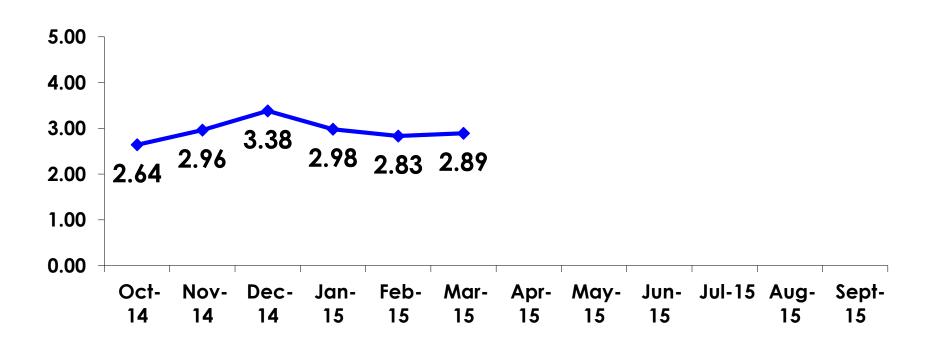
Length of Stay

Mean = 2.89 Days Median = 3.0 Days





AVG LENGTH OF STAY





Occupation by Income

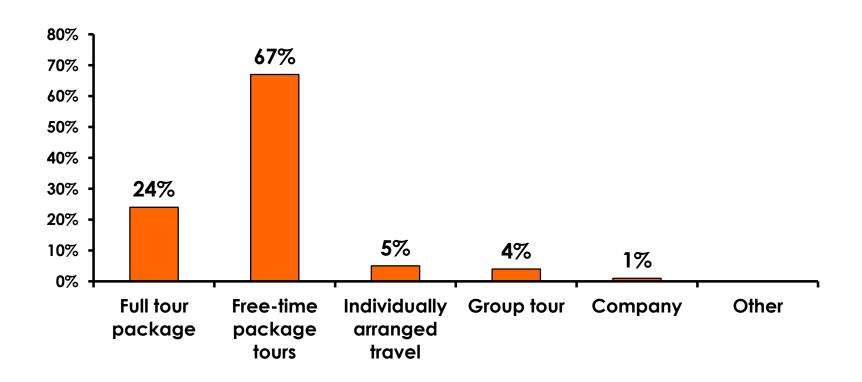
			TOTAL				Q26				
			•	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q25	Student		67%	78%	58%	46%	59%	50%	54%	71%	96%
	Engineer		7%	3%	4%	21%	9%	17%	4%	2%	
	Office worker non-mgr		5%	6%	12%	8%	6%	6%	6%	2%	
	Self-employed		4%			4%		4%	8%	12%	
	Professional/ Specialist		3%		8%		9%	6%		4%	
	Manager		2%	3%				4%	4%	6%	
	Salesperson		2%		8%	8%	9%		2%		
	Homemaker		2%	3%				6%	4%	2%	
	Other		2%			8%			6%		
	Freeter		1%		4%		3%			2%	4%
	Unemployed		1%	3%			3%	2%			
	Teacher		1%	3%		4%			2%		
	Govt- office worker non- mgr		1%					4%			
	Skilled worker		1%		4%				2%		
	Govt- Manager		1%					2%	2%		
	Retired		0%		4%						
	Free-lancer		0%						2%		
	Govt- Executive		0%						2%		
	Total	Count	342	32	26	24	32	52	48	51	23



SECTION 2 TRAVEL PLANNING



Travel Planning - Overall





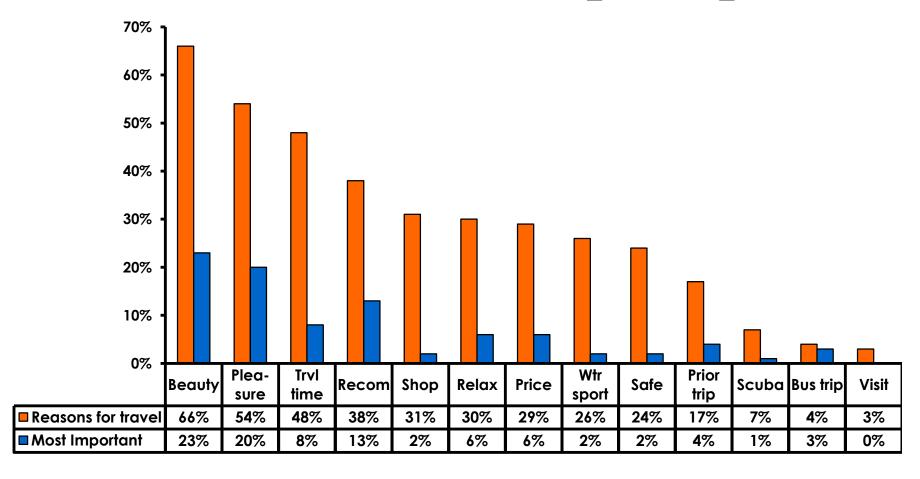
Accommodation by Income

Average length of stay: 2.89 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		10%	16%	12%	21%	6%	6%	8%	10%	
	Guam Reef & Olive Spa		7%	3%	8%	8%		8%	6%	8%	4%
	Outrigger Guam Resort		7%	16%	8%	4%		4%	6%	10%	17%
	PIC Club		7%	3%			19%	6%	6%	6%	17%
	Pacific Bay Hotel		7%	13%	8%		6%		8%	8%	4%
	Royal Orchid Guam		6%		4%		6%	10%	10%	6%	
	Hotel Nikko Guam		6%				9%	18%	13%	4%	
	Onward Beach Resort		5%	6%	8%	8%	3%	12%	4%	2%	4%
	Oceanview Hotel		5%	3%	4%	8%	9%	2%	6%	4%	4%
	Holiday Resort Guam		5%	6%	4%	4%	3%	4%	4%	6%	9%
	Bayview Hotel		4%	13%		13%	6%	2%		2%	4%
	Fiesta Resort Guam		4%			8%		4%	6%	6%	4%
	Hilton Guam Resort		4%	3%	4%	4%	3%	4%	2%	2%	9%
	Other		3%		8%		3%		4%	2%	4%
	Pacific Star Resort & Spa		3%	3%	4%	13%		2%	4%	6%	
	Leo Palace Resort		3%	3%	15%			2%	2%	4%	4%
	Grand Plaza Hotel		3%	6%			9%	2%			9%
	Verona Resort & Spa		2%				3%	4%	4%		
	Aqua Suites		2%	3%			3%	2%	2%	4%	
	Hyatt Regency Guam		2%			4%		2%	2%	6%	
	Sheraton Laguna Guam		1%					4%		2%	4%
	Lotte Hotel Guam		1%		8%	4%	6%				
	Tumon Bay Capital Hotel		1%				3%	2%		4%	
	Hotel Santa Fe		1%		8%						
	Westin Resort Guam		0%					2%			
	Total	Count	349	31	26	24	32	51	48	51	23



Travel Motivation - Top Responses





Most Important Reason for Choosing Guam

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



Motivation by Age & Gender

			TOTAL		AG	E		GEN	DER
			-	18-24	25-34	35-49	50+	Male	Female
Q5A	Natural beauty		66%	69%	69%	55%	46%	60%	71%
	Pleasure		54%	58%	51%	48%	23%	47%	61%
	Short travel time		48%	46%	47%	62%	54%	43%	52%
	Recomm- friend/family/trvl agnt		38%	46%	20%	12%	46%	35%	42%
	Shopping		31%	33%	31%	26%	15%	22%	39%
	Relax		30%	29%	31%	36%	23%	23%	36%
	Price		29%	33%	18%	26%	8%	26%	33%
	Water sports		26%	31%	16%	12%	8%	22%	29%
	Safe		24%	22%	22%	31%	38%	23%	259
	Previous trip		17%	9%	27%	50%	46%	18%	179
	Other		8%	8%	2%	10%		8%	79
	Scuba		7%	8%	7%	2%	8%	7%	79
	Company/ Business Trip		4%	3%	9%	5%		5%	39
	Visit friends/ Relatives		3%	3%	2%		8%	4%	29
	Golf		2%	0%	2%	5%	23%	2%	29
	Honeymoon		2%	0%	11%			3%	
	Organized sports		1%	2%		2%		2%	19
	Married/ Attn wedding		1%	0%	4%	2%	8%	3%	
	Company Sponsored		1%			2%	15%	2%	
	Career Cert/ Testing		1%	0%	2%			1%	19
	Total	Count	351	248	45	42	13	176	179



Motivation by Income

		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
Q5A	Natural beauty	66%	58%	69%	58%	66%	67%	71%	75%	57%
	Pleasure	54%	52%	46%	46%	59%	52%	60%	65%	52%
	Short travel time	48%	45%	27%	54%	53%	54%	50%	51%	39%
	Recomm- friend/family/trvl agnt	38%	39%	35%	29%	31%	35%	35%	35%	39%
	Shopping	31%	35%	31%	33%	38%	33%	31%	35%	26%
	Relax	30%	32%	38%	29%	38%	25%	35%	29%	22%
	Price	29%	26%	31%	25%	28%	25%	44%	22%	39%
	Water sports	26%	35%	27%	33%	31%	21%	19%	20%	30%
	Safe	24%	32%	27%	25%	22%	25%	31%	27%	4%
	Previous trip	17%	19%	23%	8%	19%	19%	27%	22%	13%
	Other	8%	3%	12%	8%	6%	6%	10%	8%	4%
	Scuba	7%	16%			3%	8%	10%	8%	9%
	Company/ Business Trip	4%	10%	8%	8%		2%	4%		4%
	Visit friends/ Relatives	3%	3%	4%			2%	4%	4%	9%
	Golf	2%		4%	4%		2%	2%	4%	
	Honeymoon	2%	3%	4%	4%	3%	4%			
	Organized sports	1%	3%			3%	2%		2%	
	Married/ Attn wedding	1%	3%		4%		4%	2%		
	Company Sponsored	1%		4%				2%	2%	
	Career Cert/ Testing	1%	3%				2%			
	Total Coun	t 351	31	26	24	32	52	48	51	23



SECTION 3 EXPENDITURES



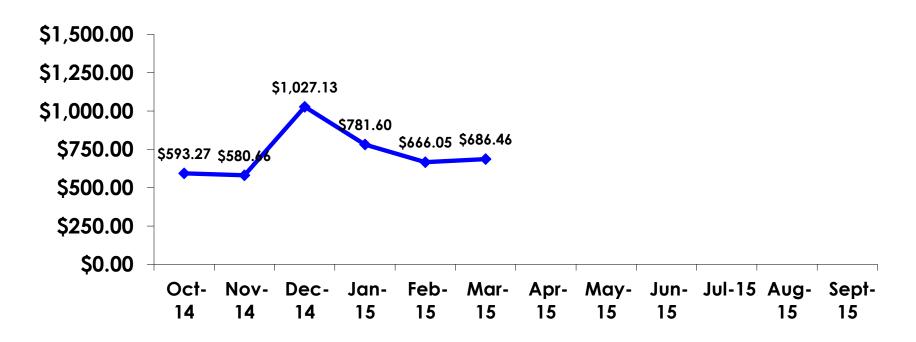
Prepaid Expenditures

¥120.62/US\$1

- \$1,047.65 = overall mean average prepaid expense (for entire travel party size) by respondent
- $\$0 = \min \text{minimum}$ (lowest amount recorded for the entire sample)
- \$16,681 = maximum (highest amount recorded for the entire sample)
- \$686.46 = overall mean average <u>per person</u> prepaid expenditures



PREPAID EXPENDITURES Per Person





Breakdown of Prepaid Expenditures ¥120.62=\$1

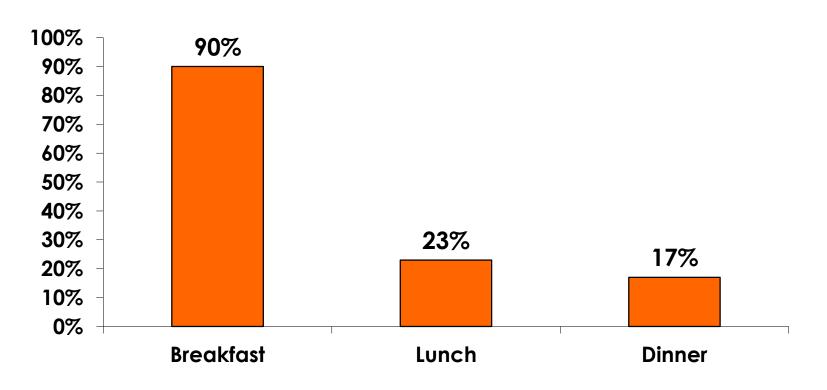
(Filter: Only those who responded/ Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$971.02
Air & Accommodation w/ daily meal package	\$2,152.40
Air only	\$1,033.55
Accommodation only	\$552.70
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation – Japan	\$48.67
Ground transportation – Guam	\$59.07
Optional tours/ activities	\$180.94
Other expenses	\$229.14
Total Prepaid	\$1,047.65



PREPAID MEAL BREAKDOWN

Air/Accommodations with Daily Meal Pkg. n=30

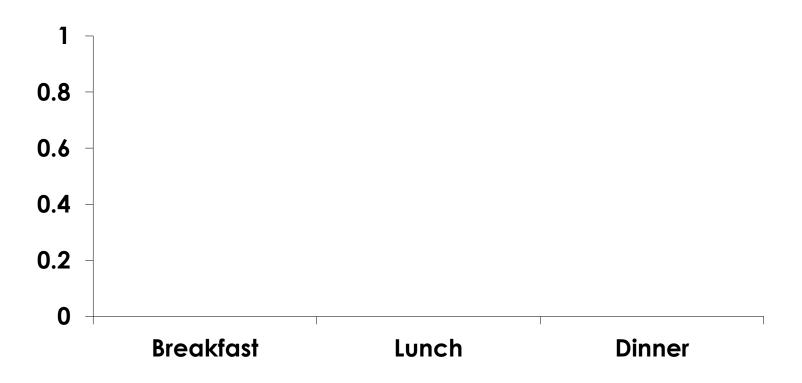


Mean=\$2,152.40 per travel party



PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg. n=X

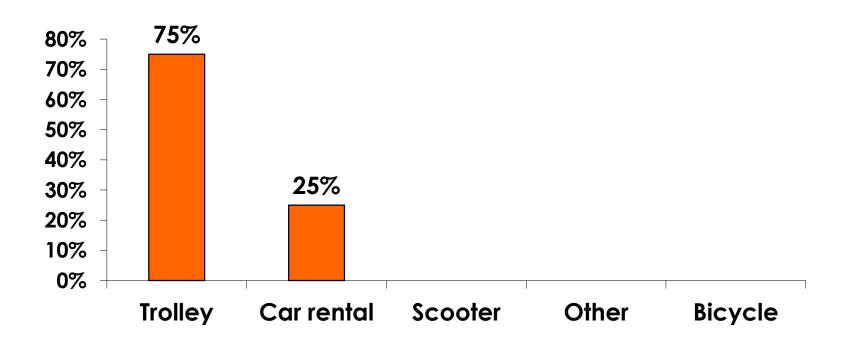


Mean=\$xxx per travel party



PREPAID GROUND TRANSPORTATION

n=4



Mean=\$59.07 per travel party

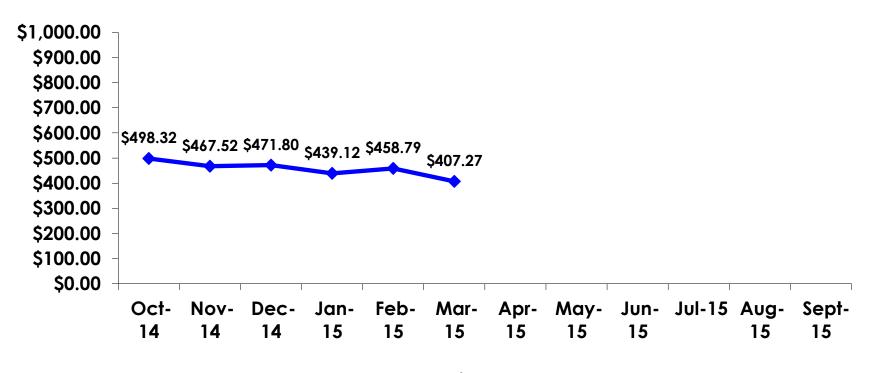


On-Island Expenditures

- \$592.45 = 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)
- \$407.27 = overall mean average <u>per person</u> onisland expenditure



ON-ISLAND EXPENDITURES Per Person

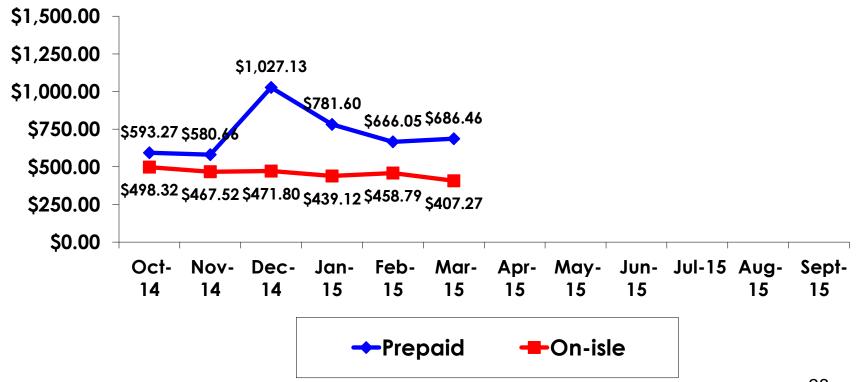


$$YTD = $457.10$$



PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$722.64 On-Isle YTD = \$457.10





Total On-Island Expenditure by Gender & Age

TOTAL GENDER				DER	GENDER								
					Ma	ale		Female					
					AGE				AGE				
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+	
PER PERSON	Mean	\$407.27	\$410.57	\$403.93	\$352.78	\$583.54	\$419.06	\$468.56	\$356.88	\$536.92	\$623.24	\$876.25	
	Median	\$333	\$320	\$333	\$300	\$400	\$342	\$500	\$324	\$300	\$423	\$478	
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$242	\$0	\$0	\$155	\$350	
	Maximum	\$2,500	\$2,500	\$2,200	\$1,050	\$2,500	\$2,500	\$750	\$1,050	\$2,000	\$1,667	\$2,200	



On-Island Expenditure Categories by Gender & Age

		TOTAL GENDER				A	ЭE	
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$27.28	\$36.10	\$18.37	\$18.86	\$36.56	\$30.14	\$153.69
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$30
F&B FF/STORE	Mean	\$29.49	\$29.00	\$29.98	\$28.89	\$36.67	\$23.00	\$43.85
	Median	\$ 5	\$0	\$7	\$10	\$0	\$0	\$20
F&B RESTRNT	Mean	\$70.18	\$78.86	\$61.39	\$53.82	\$81.78	\$134.79	\$150.77
	Median	\$15	\$0	\$20	\$20	\$15	\$0	\$80
OPT TOUR	Mean	\$52.83	\$60.98	\$44.59	\$45.45	\$57.42	\$68.95	\$138.46
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$99.43	\$83.08	\$115.97	\$55.96	\$219.44	\$237.14	\$94.62
	Median	\$0	\$0	\$30	\$ 5	\$0	\$0	\$0
GIFT- OTHER	Mean	\$111.53	\$130.20	\$92.65	\$65.96	\$311.00	\$131.43	\$255.38
	Median	\$32	\$20	\$50	\$40	\$30	\$0	\$130
TRANS	Mean	\$12.60	\$12.24	\$12.96	\$8.04	\$32.22	\$16.02	\$23.85
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$191.02	\$239.81	\$141.67	\$122.65	\$288.02	\$425.71	\$365.85
	Median	\$0	\$0	\$0	\$0	\$25	\$0	\$0
TOTAL	Mean	\$592.45	\$666.44	\$517.61	\$396.12	\$1,066.44	\$1,068.38	\$1,226.46
	Median	\$400	\$400	\$350	\$320	\$500	\$795	\$1,000

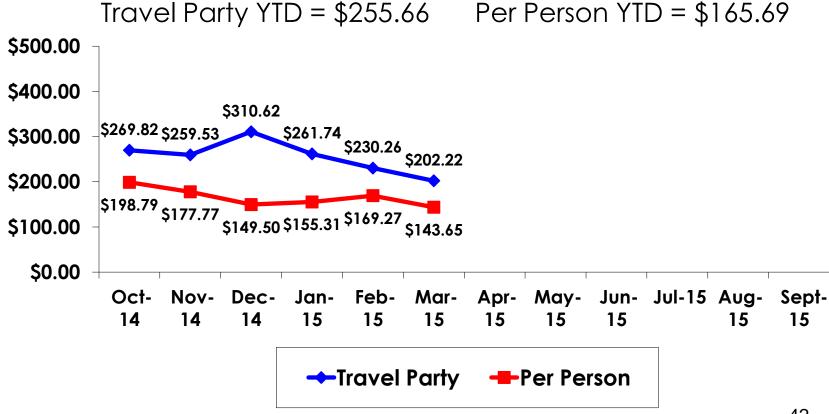


On-Island Expenditures First Timers & Repeaters

		TOTAL	TRIPS T	O GUAM
		1	1st	Repeat
F&B HOTEL	Mean	\$27.28	\$23.53	\$38.53
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$29.49	\$31.14	\$24.52
	Median	\$ 5	\$6	\$0
F&B RESTRNT	Mean	\$70.18	\$54.91	\$115.97
	Median	\$15	\$2	\$ 55
OPT TOUR	Mean	\$52.83	\$47.85	\$67.77
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$99.43	\$76.03	\$169.61
	Median	\$0	\$0	\$9
GIFT- OTHER	Mean	\$111.53	\$114.69	\$102.07
	Median	\$32	\$34	\$30
TRANS	Mean	\$12.60	\$11.21	\$16.76
	Median	\$0	\$0	\$0
OTHER	Mean	\$191.02	\$154.83	\$299.59
	Median	\$0	\$0	\$0
TOTAL	Mean	\$592.45	\$511.25	\$836.03
	Median	\$400	\$349	\$500



ON-ISLE EXPENDITURES – Per Day



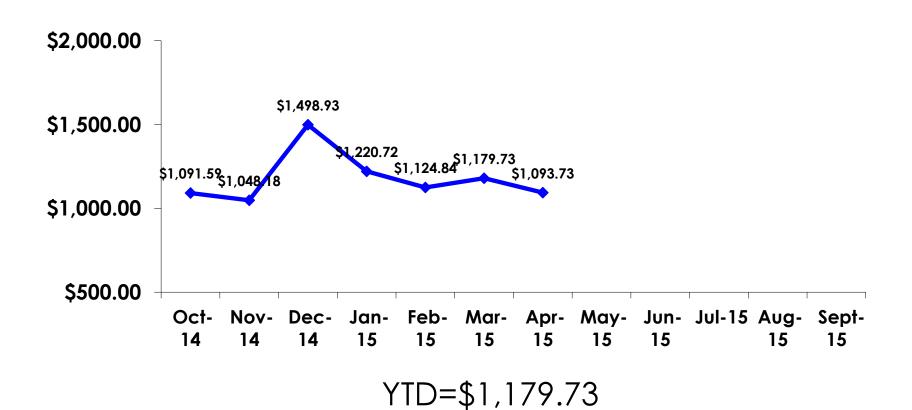


Total Expenditures Per Person (Prepaid & On-Island)

- \$1,093.73 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,675 = Maximum (highest amount recorded for the entire sample)



TOTAL EXPENDITURES Per Person





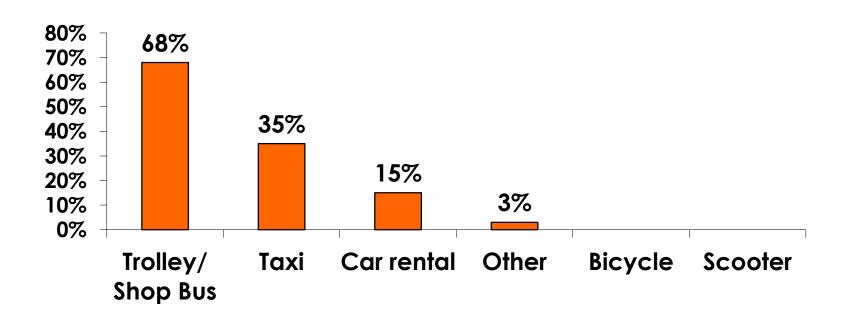
Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$27.28
Food & beverage in fast food restaurant/convenience store	\$29.49
Food & beverage at restaurants or drinking establishments outside a hotel	\$70.18
Optional tours and activities	\$52.83
Gifts/ souvenirs for yourself/companions	\$99.43
Gifts/ souvenirs for friends/family at home	\$111.53
Local transportation	\$12.60
Other expenses not covered	\$191.02
Average Total	\$592.45



Local Transportation

n=78



Mean=\$12.60 per travel party



Guam Airport Expenditures

- \$26.53 = Mean
- \$3 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$800 = Maximum (highest amount recorded for the entire sample)



Breakdown of Airport Expenditures

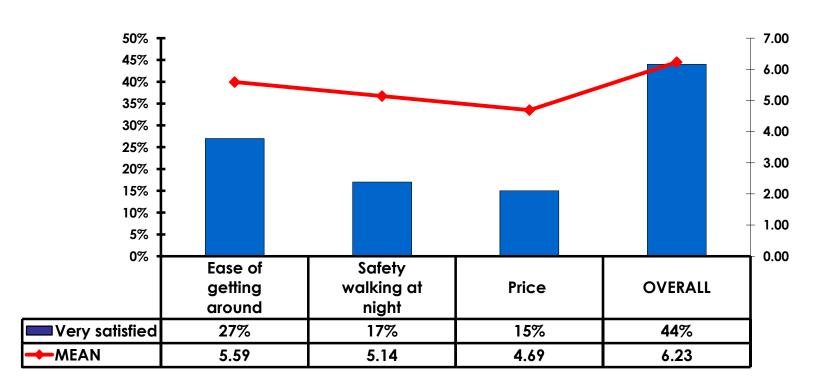
	MEAN \$
Food & Beverages	\$7.34
Gifts/Souvenirs Self	\$7.92
Gifts/Souvenirs Others	\$11.32
Total	\$26.53



SECTION 4 VISITOR SATISFACTION

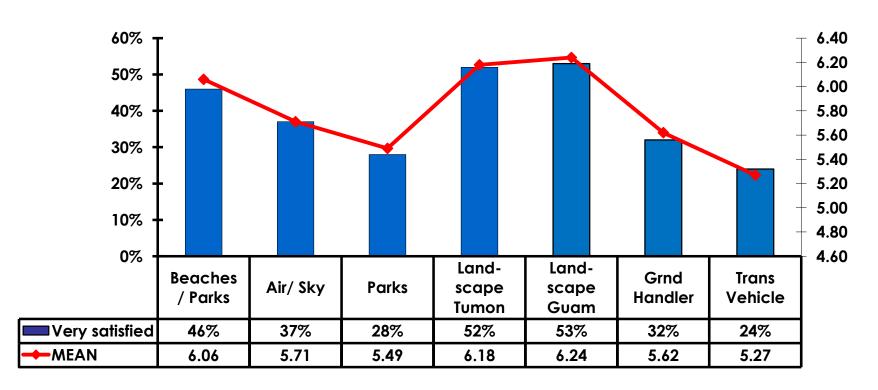


Satisfaction Scores Overall



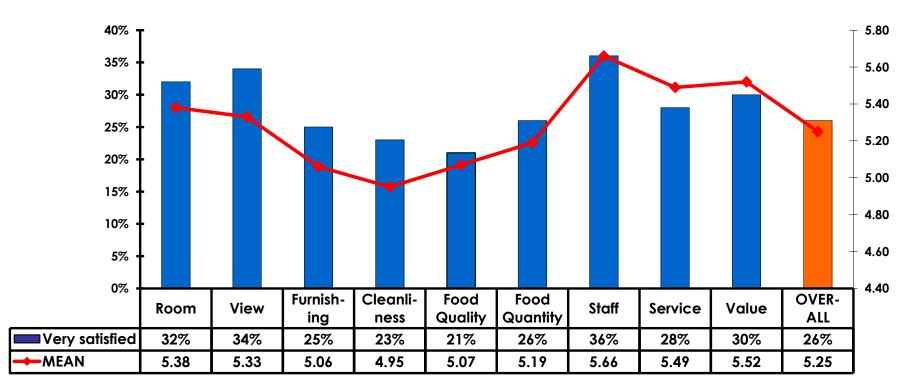


Satisfaction Quality/ Cleanliness



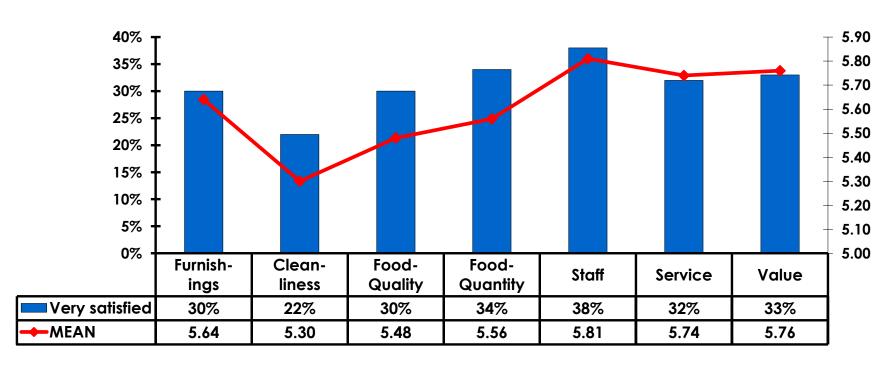


Quality of Accommodations



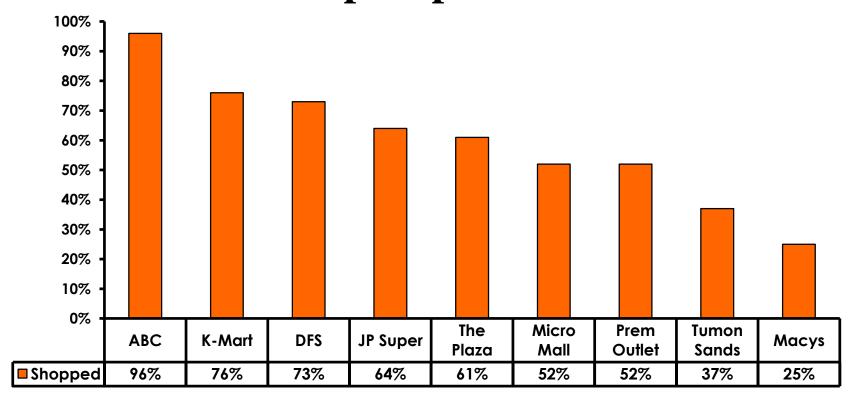


Quality of Dining Experience





Visits to Shopping Centers/Malls on Guam Top responses



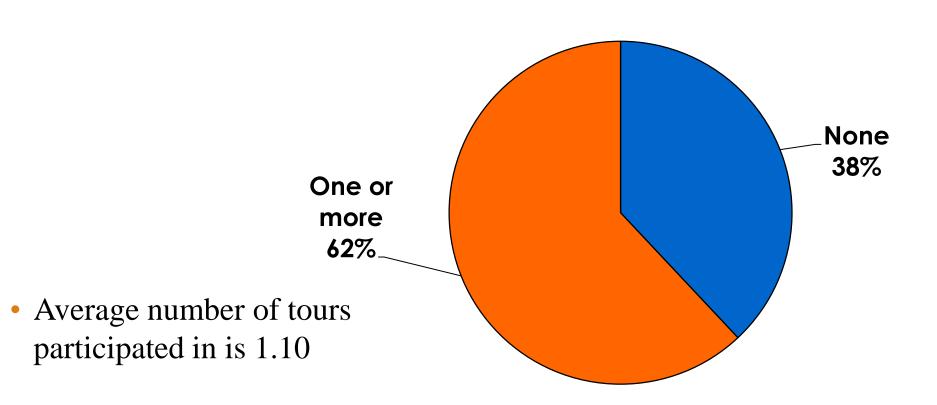


Satisfaction with Shopping

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 60%	Score of 6 to 7 = 56%
Score of 4 to 5 = 36%	Score of 4 to 5 = 37%
Score 1 to 3 = 4 %	Score 1 to 3 = 6%
MEAN = 5.62	MEAN = 5.54

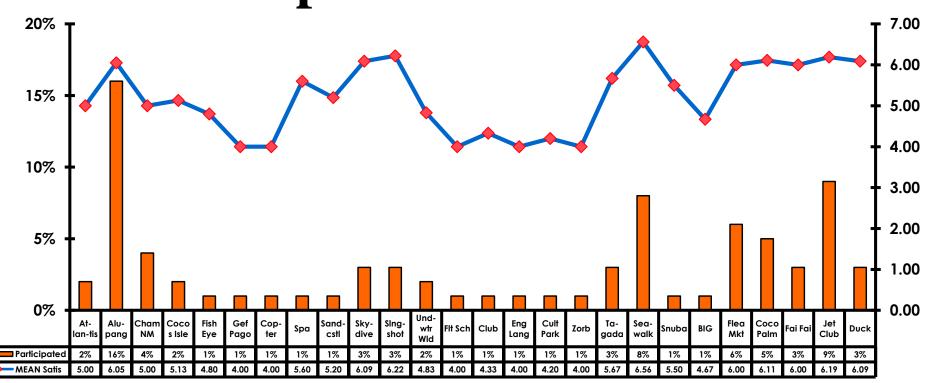


Optional Tour Participation





Optional Tours Participation & Satisfaction





Day Tours Satisfaction

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 66%	Score of 6 to 7 = 72 %
Score of 4 to 5 = 33%	Score of 4 to 5 = 37%
Score 1 to 3 = 1%	Score 1 to 3 = 0 %
MEAN = 5.81	MEAN = 5.74

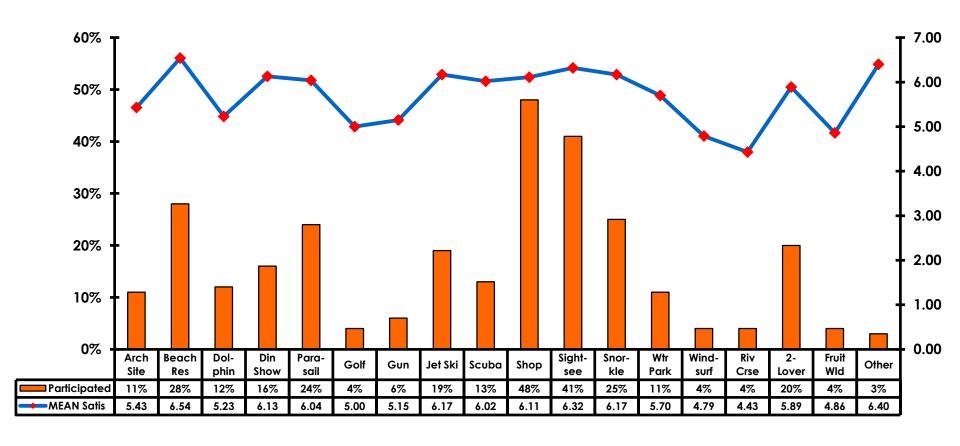


Night Tours Satisfaction

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 34%	Score of 6 to 7 = 32%
Score of 4 to 5 = 63 %	Score of 4 to 5 = 66%
Score 1 to 3 = 2 %	Score 1 to 3 = 1%
MEAN = 4.94	MEAN = 4.92

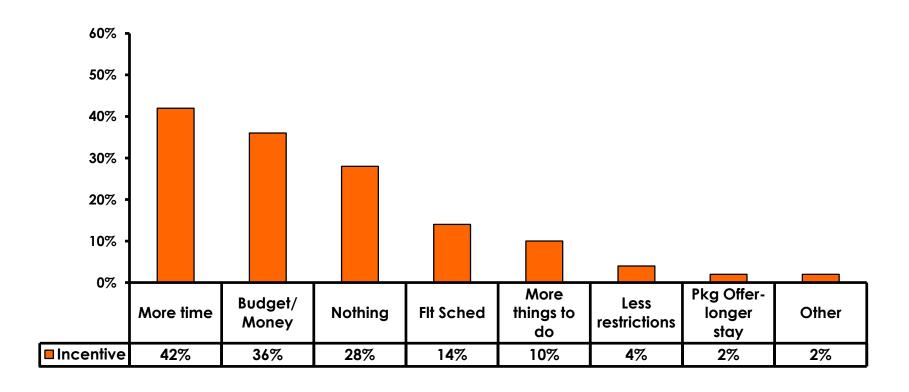


Satisfaction with Other Activities





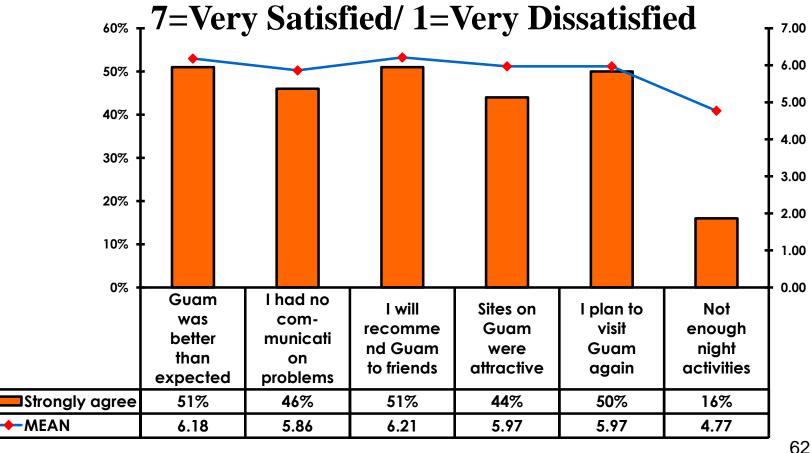
What would it take to make you want to stay an extra day in Guam?





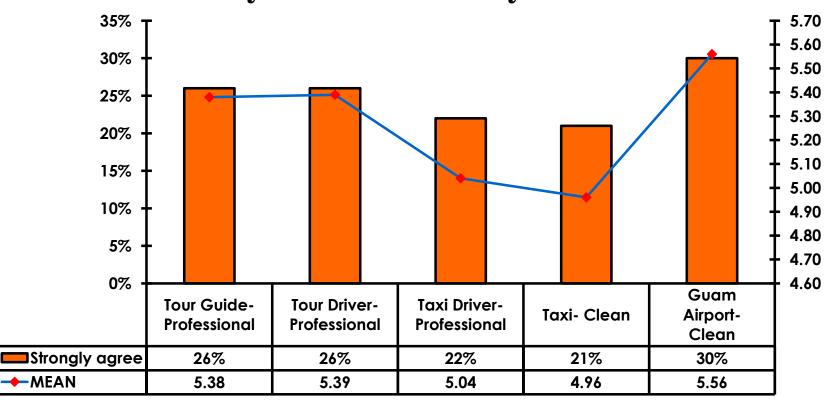
On-Island Perceptions







On-Island Perceptions

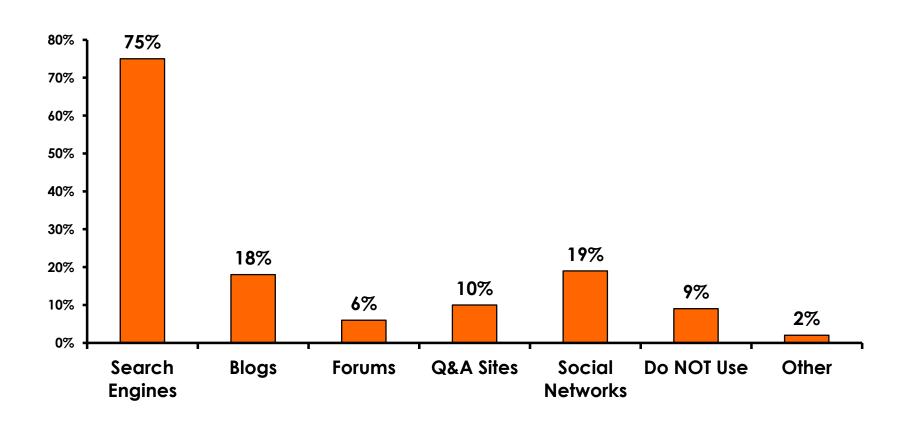




SECTION 5 PROMOTIONS

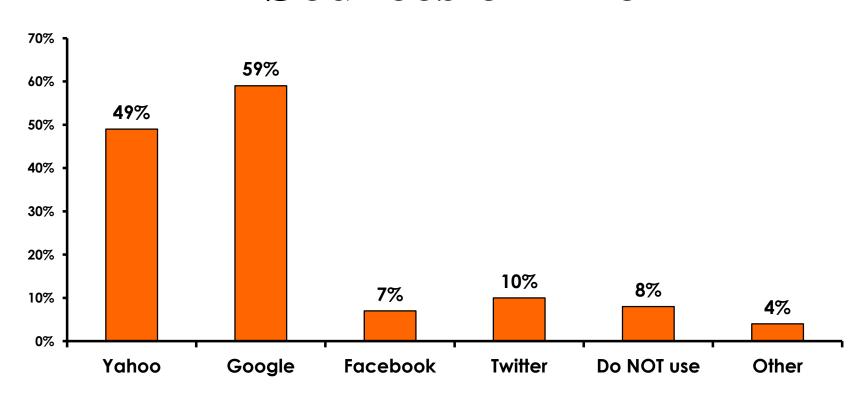


Internet- Guam Sources of Info



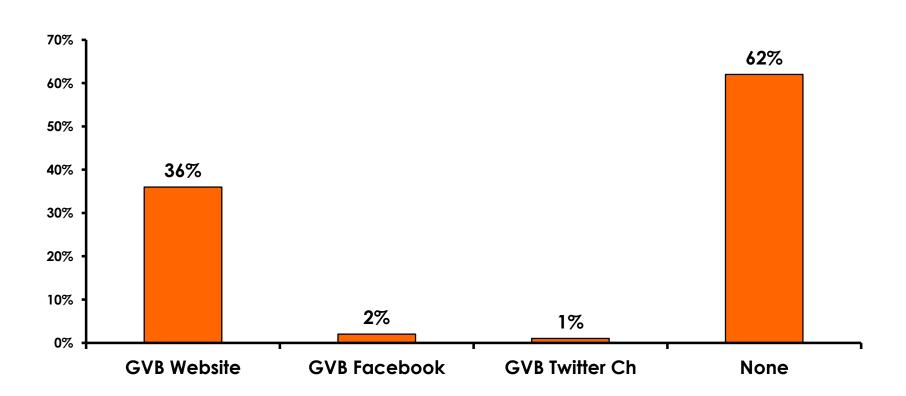


Internet- Things To Do Sources of Info



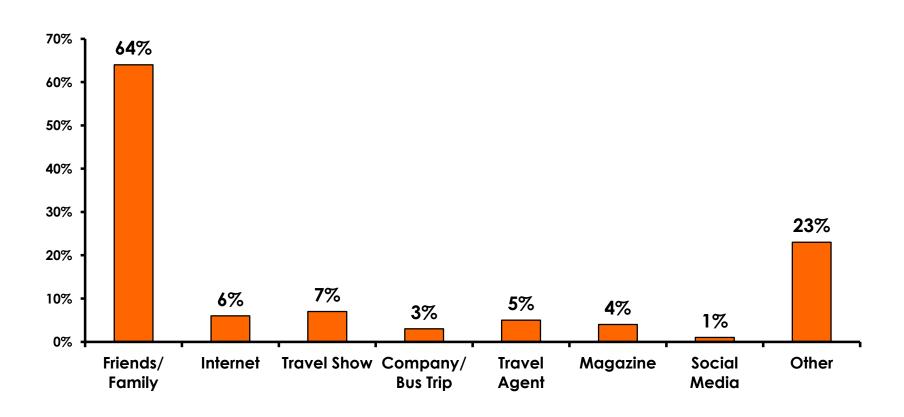


Internet- GVB Sources



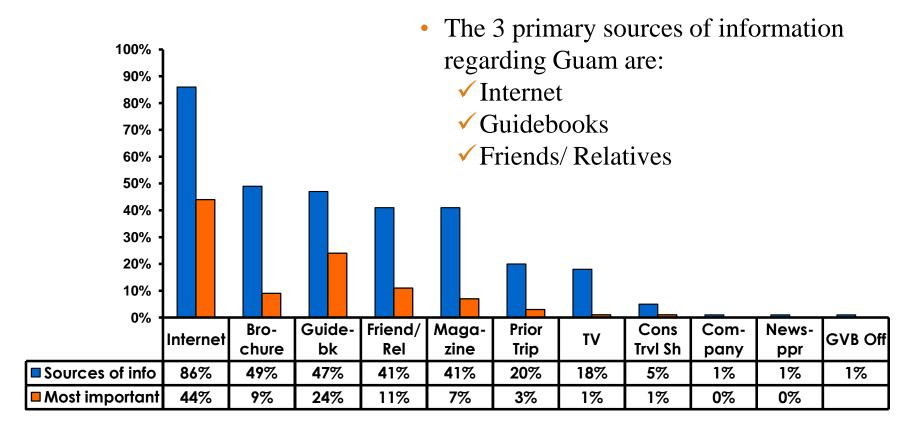


Travel Motivation-Info Sources



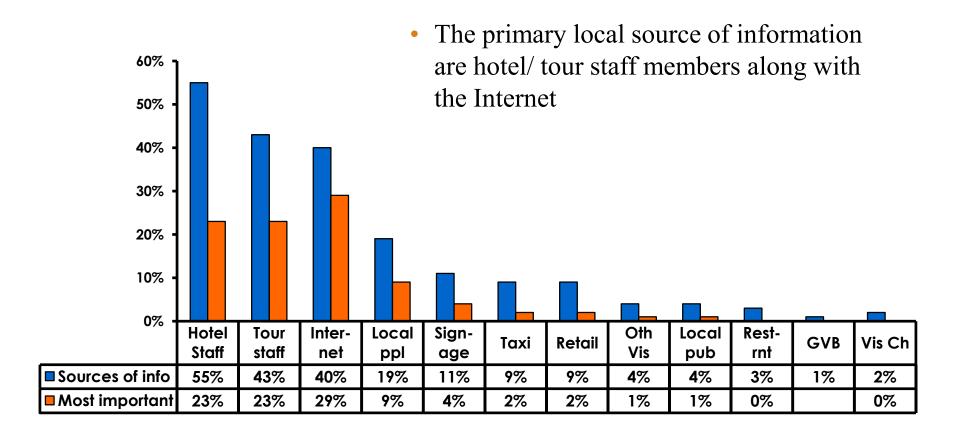


Sources of Information Pre-arrival





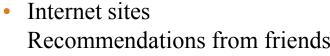
Sources of Information Post-arrival

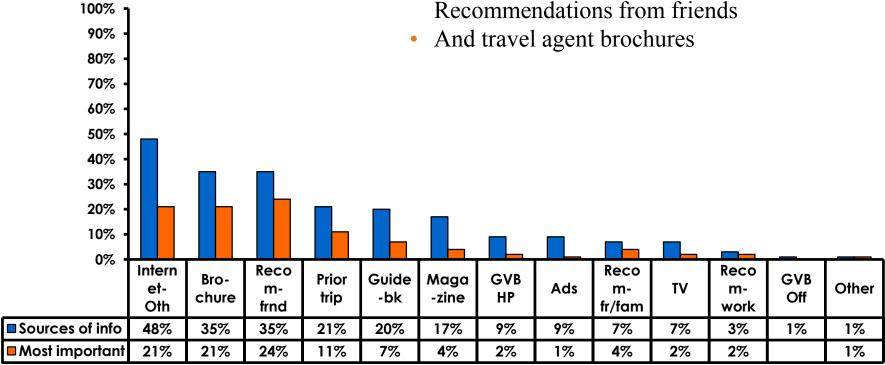




Sources of Information - Motivation

The primary motivational sources of information were.



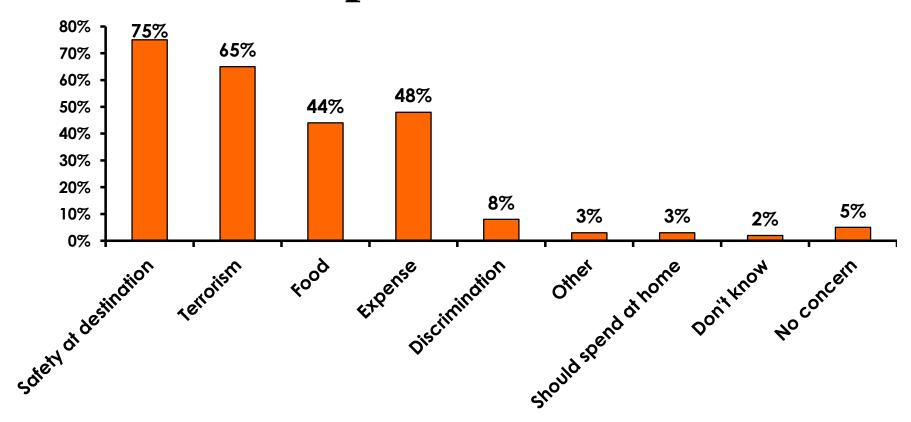




SECTION 6 OTHER ISSUES



Concerns about travel outside of Japan - Overall



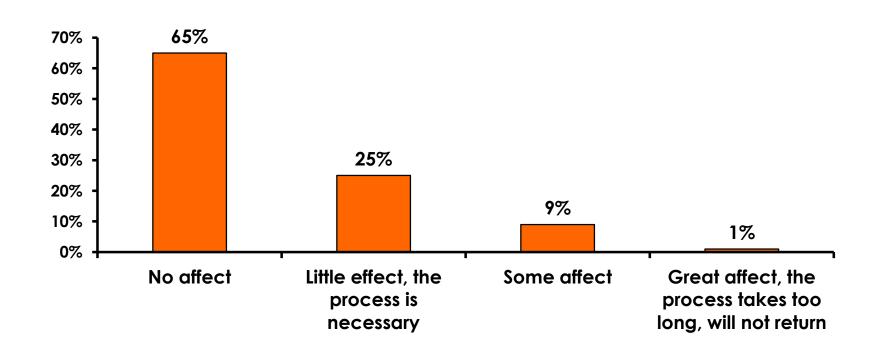


Concerns about travel outside of Japan - By Age & Income

		TOTAL		AC	ξE		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	75%	74%	70%	76%	92%	72%	77%	88%	81%	79%	81%	65%	61%
	Terrorism	65%	63%	68%	83%	54%	56%	54%	63%	81%	67%	70%	71%	78%
	Expense	48%	50%	52%	37%	31%	56%	31%	46%	53%	48%	53%	47%	48%
	Food	44%	46%	32%	44%	38%	47%	31%	38%	38%	50%	34%	53%	57%
	Discrimination against Japanese	8%	8%	7%	7%	15%	3%	4%	13%	6%	12%	11%	10%	9%
	No concerns	5%	4%	7%	2%	8%	6%	4%		3%	6%	4%	4%	4%
	Should spend at home	3%	4%				3%	4%				2%	8%	4%
	Other	3%	4%				9%	4%	4%		4%	2%		
	Don't know	2%	2%				6%	4%			2%		4%	
	Total Coun	350	249	44	41	13	32	26	24	32	52	47	51	23



Security Screening/Immigration Process at Guam International Airport





Airport Screening

7pt Rating Scale

