



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015

MAY 2015



Prepared by: QMark Research

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Background & Methodology

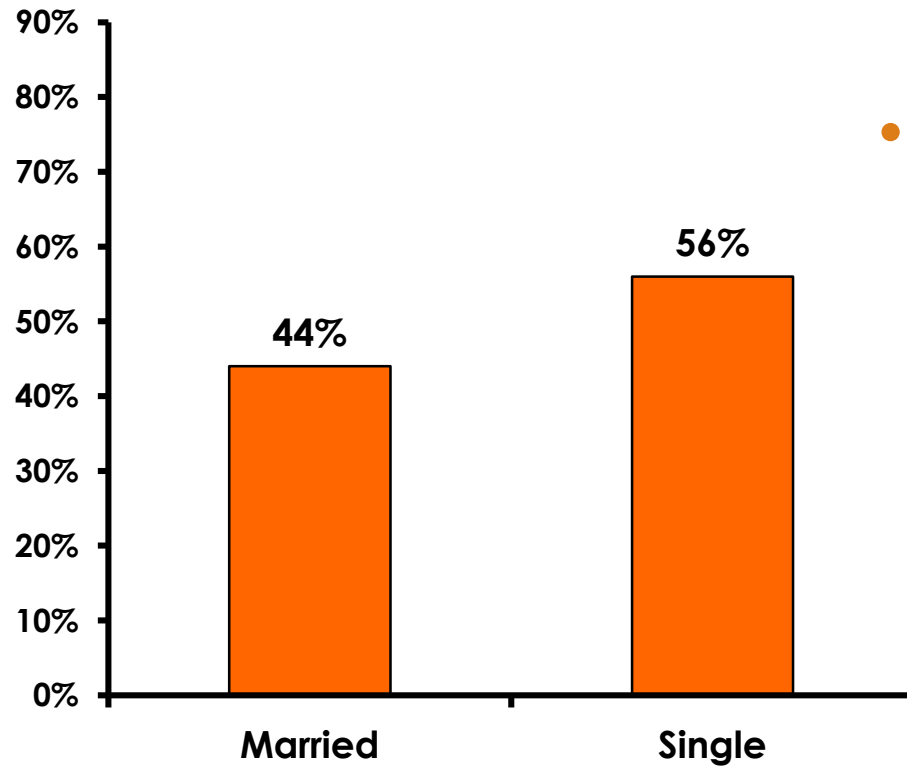
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing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

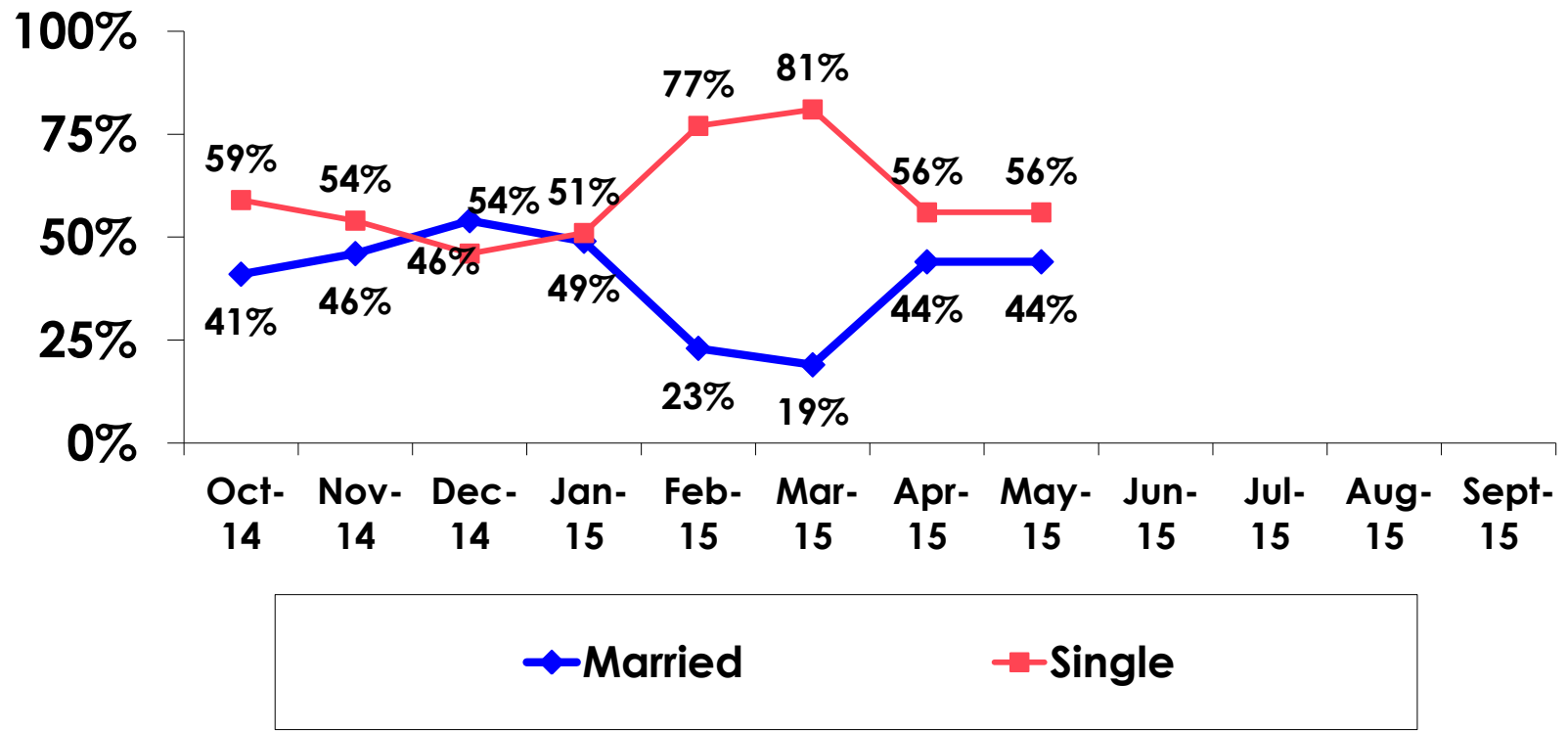
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

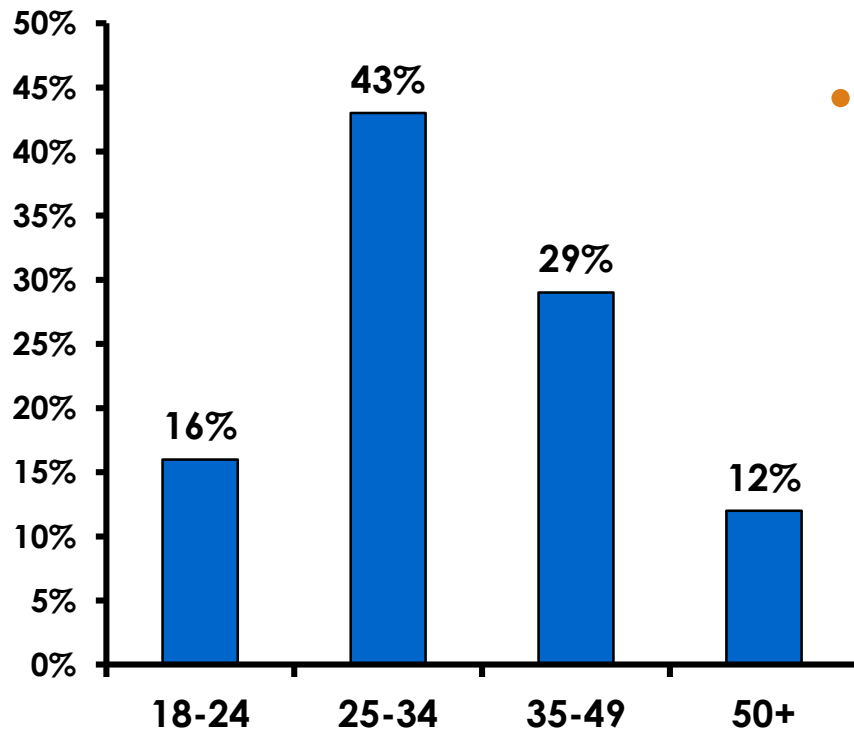


- 63% of first time visitors are single.

MARITAL STATUS

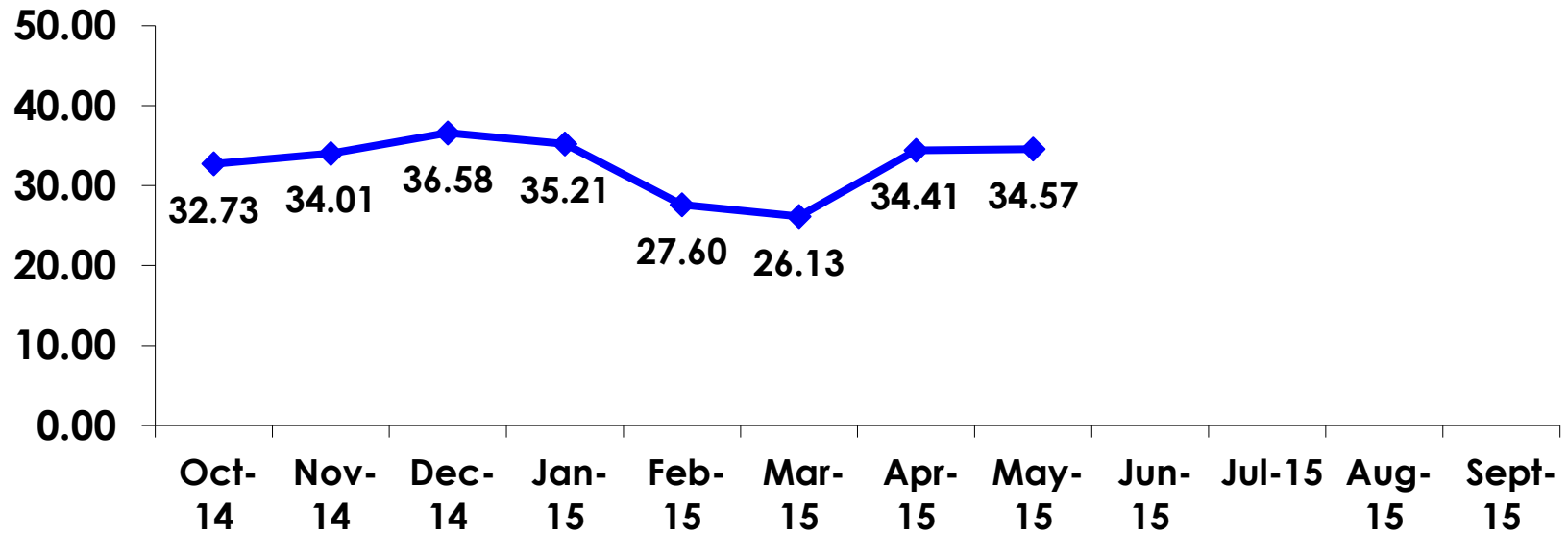


Age - Overall

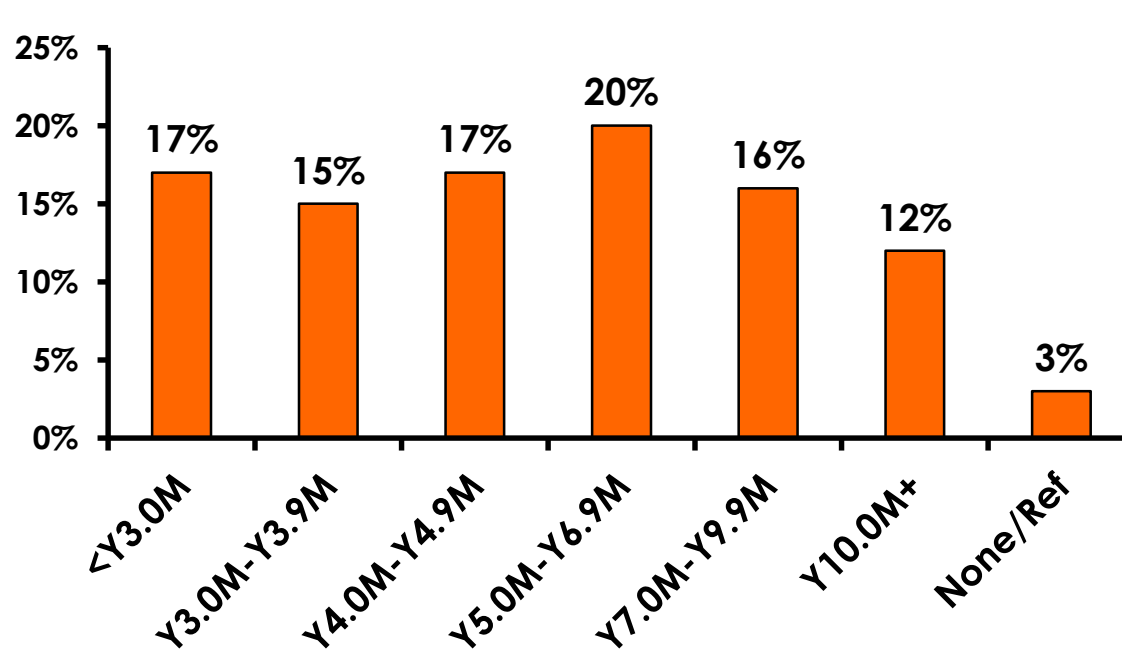


- The average age of the respondents is 34.57 years of age.

AVERAGE - AGE

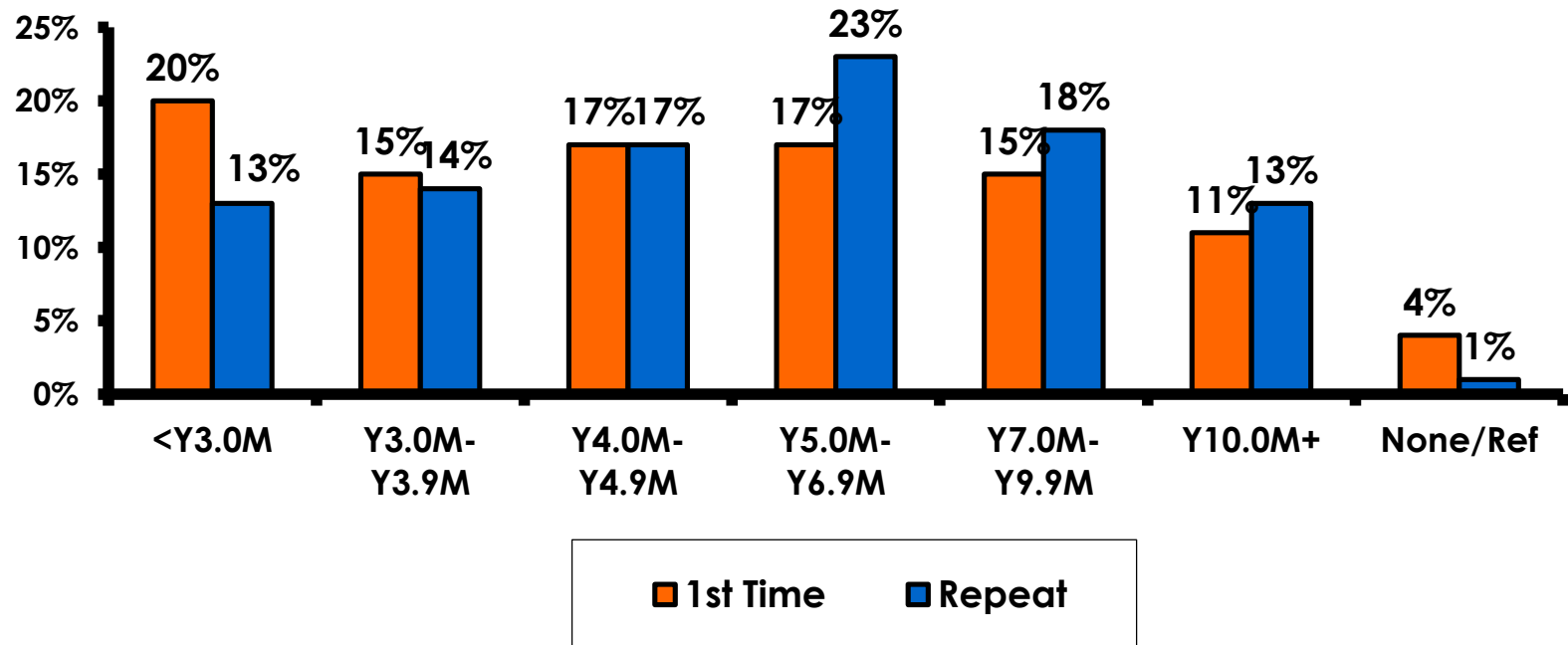


Personal Income



• ¥119.76=\$1

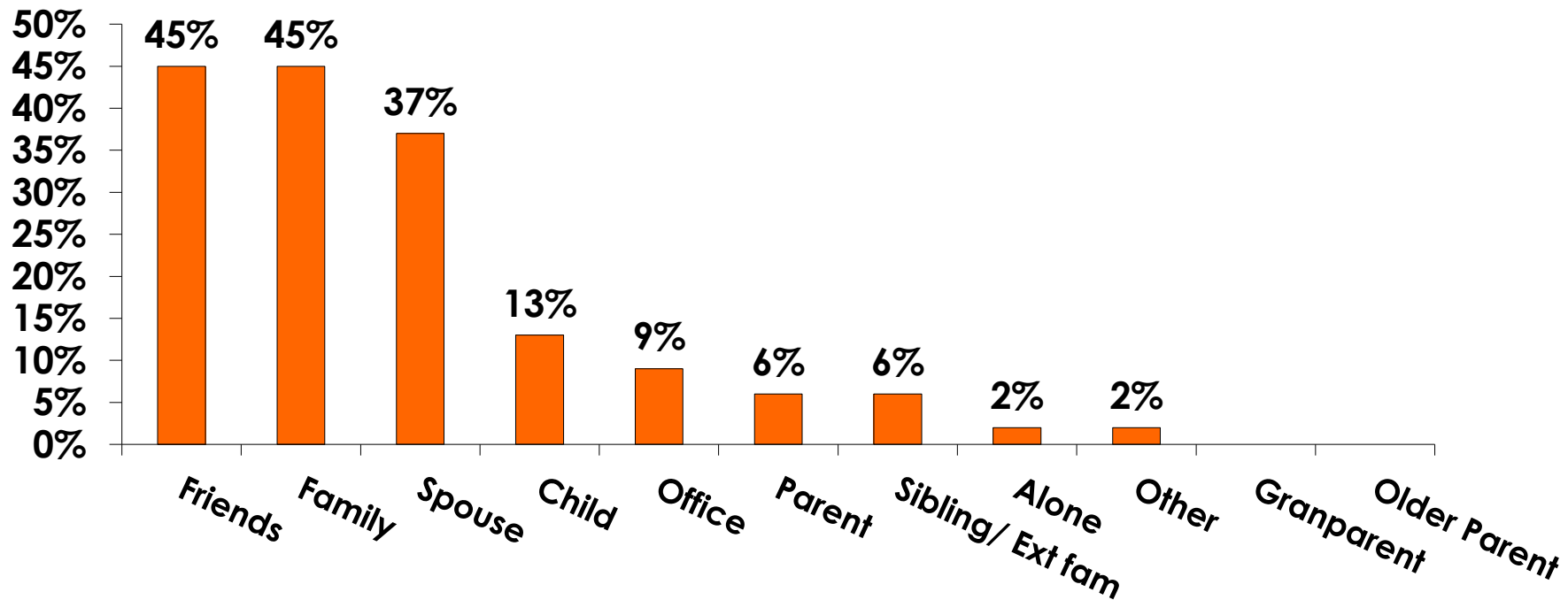
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	17	4	13	4	9	2	2
		Column N %	5%	2%	9%	9%	7%	2%	5%
	Y2.0M-Y3.0M	Count	36	8	28	13	16	4	3
		Column N %	12%	5%	19%	30%	12%	4%	8%
	Y3.0M-Y4.0M	Count	46	17	29	6	29	9	2
		Column N %	15%	11%	19%	14%	22%	10%	5%
	Y4.0M-Y5.0M	Count	53	22	31	4	27	13	9
		Column N %	17%	14%	21%	9%	20%	14%	23%
	Y5.0M-Y7.0M	Count	63	41	22	6	26	22	9
		Column N %	20%	25%	15%	14%	19%	23%	23%
	Y7.0M-Y10.0M	Count	50	37	13		11	32	7
		Column N %	16%	23%	9%		8%	34%	18%
	Y10.0M+	Count	37	28	9	6	15	10	5
		Column N %	12%	17%	6%	14%	11%	11%	13%
	No Income	Count	9	4	5	4	1	2	2
		Column N %	3%	2%	3%	9%	1%	2%	5%
	Total	Count	311	161	150	43	134	94	39

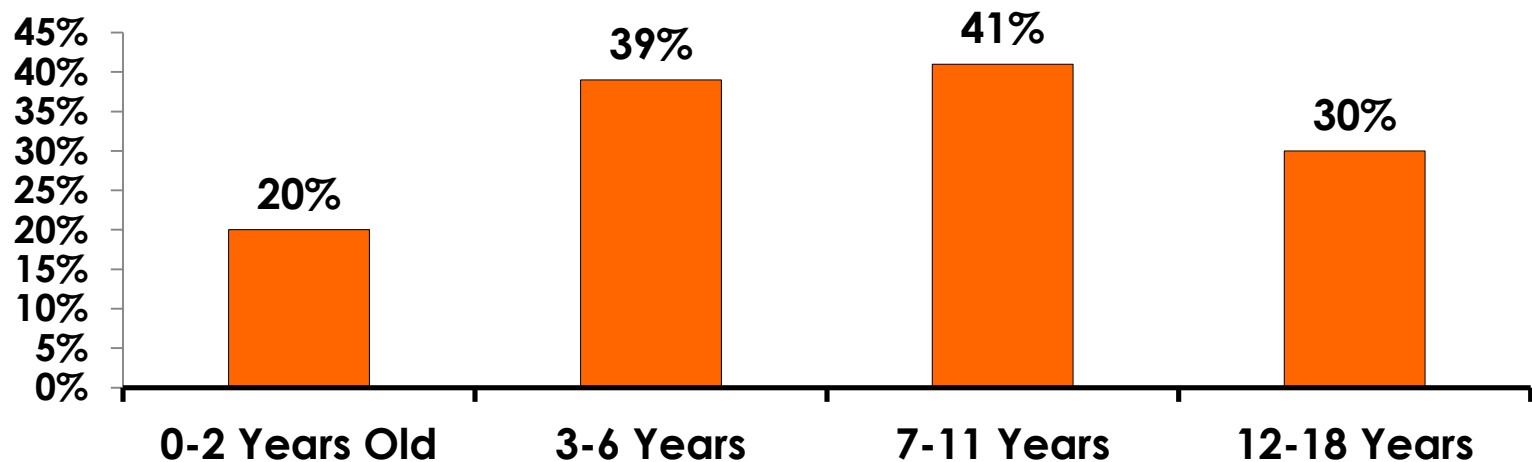
Travel Companions



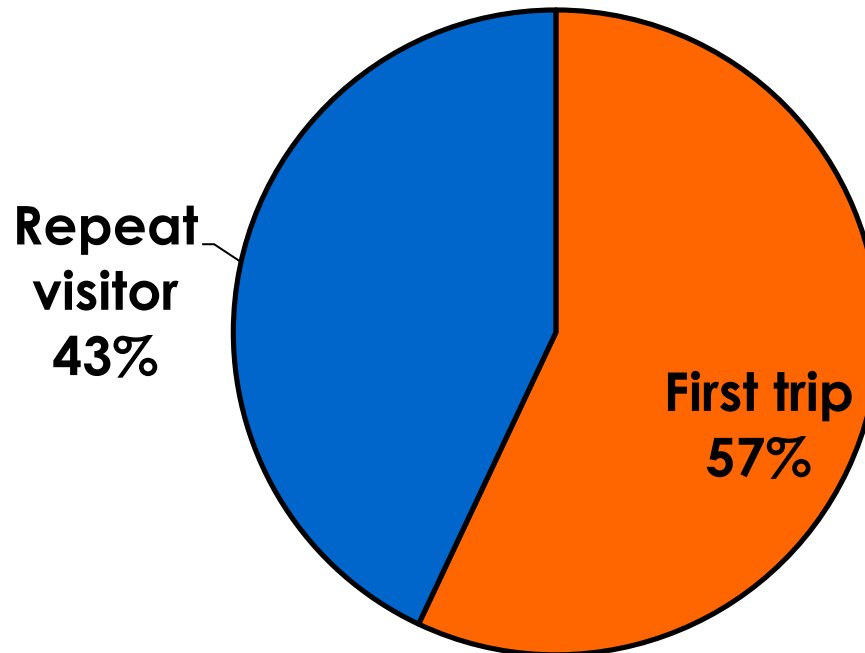
Number of Children Travel Party

N=46 total respondents traveling with children.

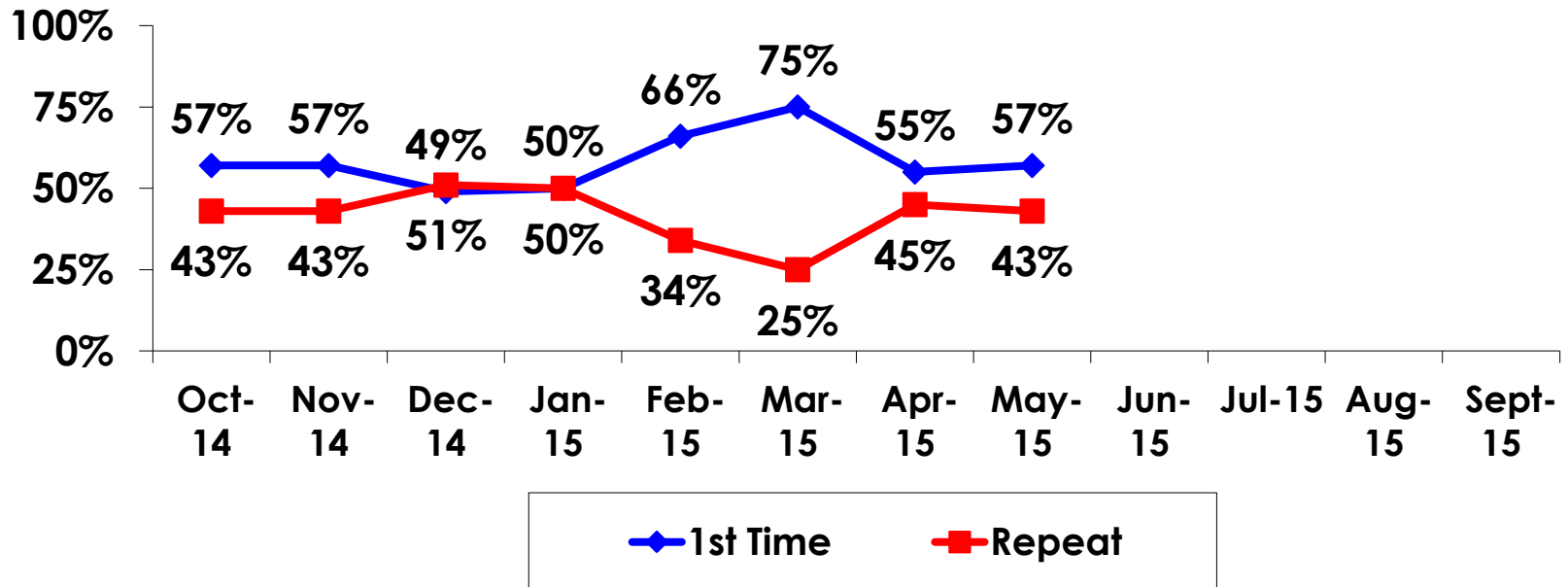
(Of those N=46 respondents, there is a total of 66 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



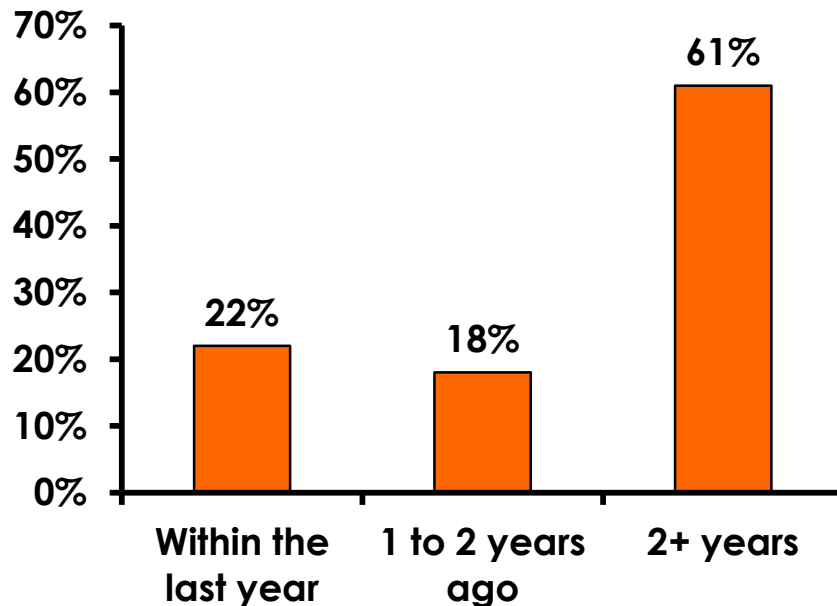
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	174	87	85	
		Column N %	49%	44%	56%	
	Female	Count	178	111	67	
		Column N %	51%	56%	44%	
	Total	Count	352	198	152	
AGE	18-24	Count	56	47	9	
		Column N %	16%	24%	6%	
	25-34	Count	151	83	67	
		Column N %	43%	42%	44%	
	35-49	Count	101	45	55	
		Column N %	29%	23%	36%	
	50+	Count	43	23	20	
		Column N %	12%	12%	13%	
		Total	Count	351	198	151

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

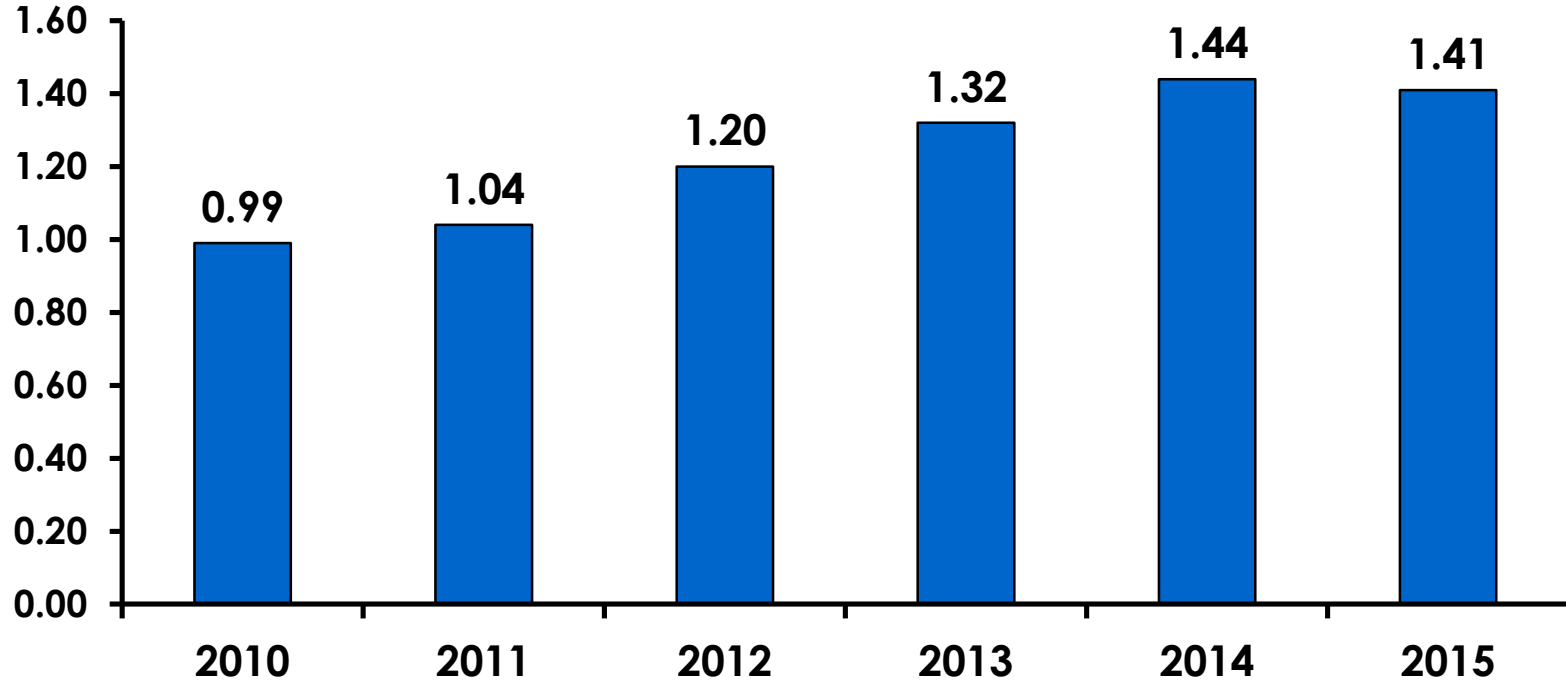
Repeat Visitors Last Trip

n = 147



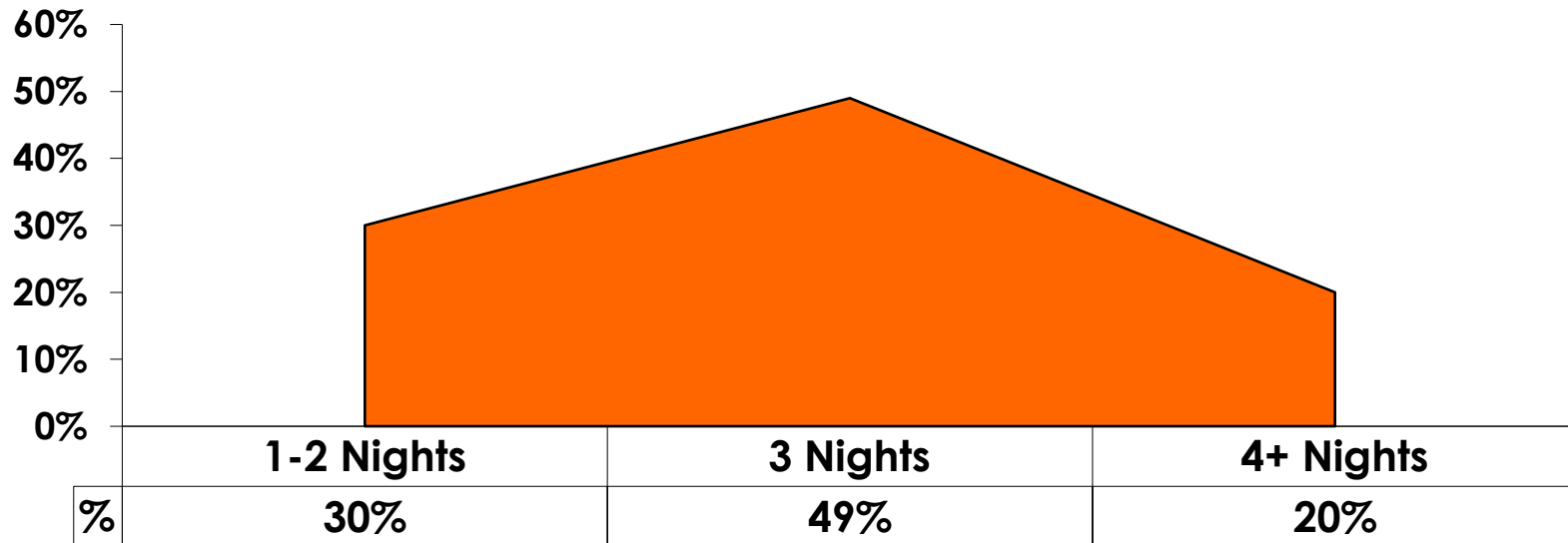
- The average repeat visitor has been to Guam 3.14 times.
- Two in five repeat visitors have been to Guam within the last 2 years.

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

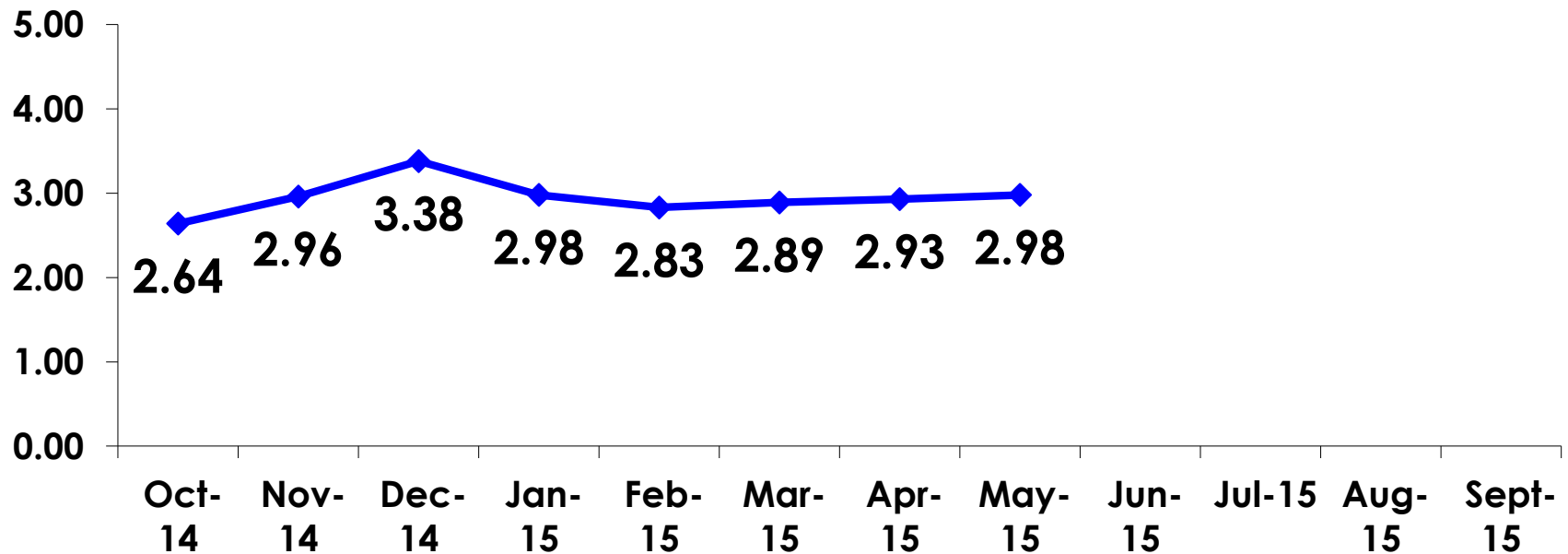


Length of Stay

Mean = 2.98 Days
Median = 3.0 Days



AVG LENGTH OF STAY

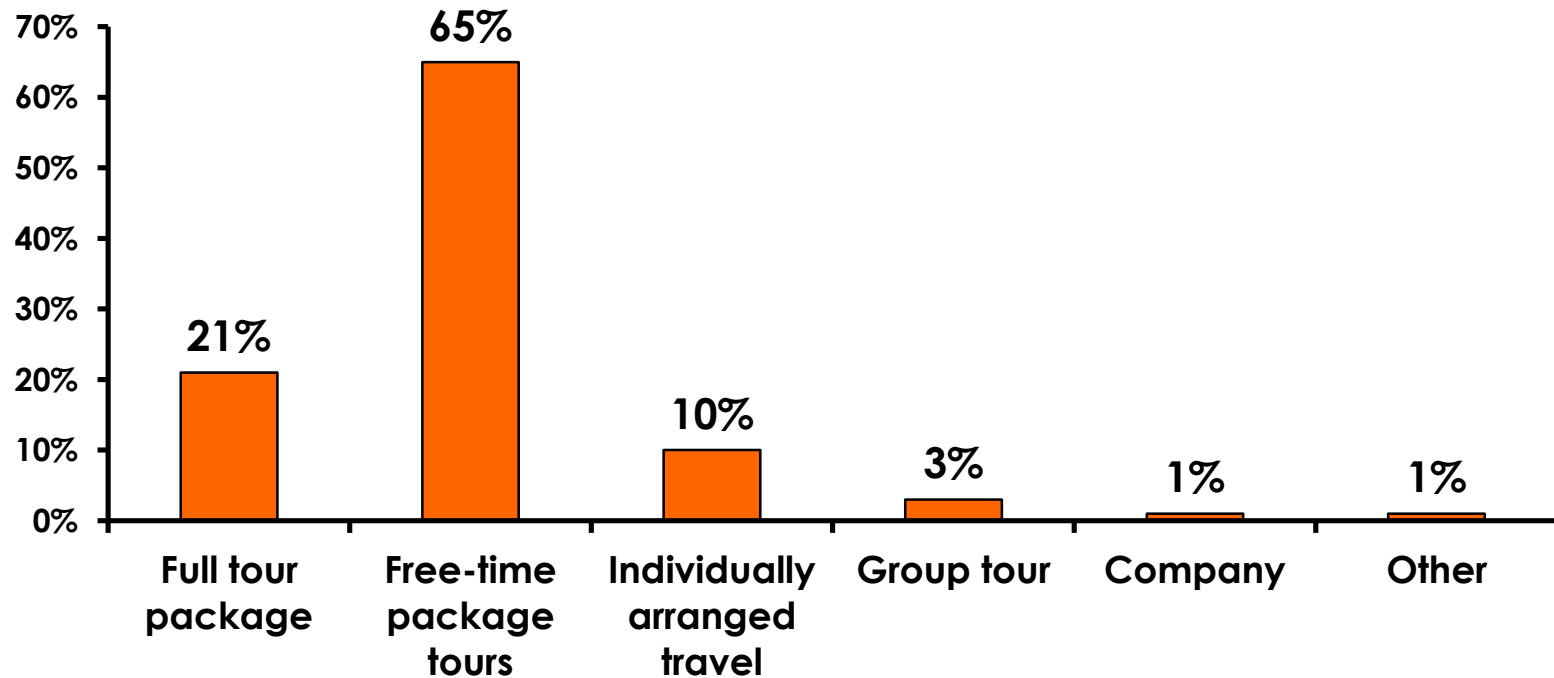


Occupation by Income

		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	23%	18%	31%	30%	26%	16%	16%	19%		
	Engineer	17%	18%	14%	26%	21%	18%	14%	11%		
	Salesperson	12%	6%	14%	7%	15%	18%	10%	16%		
	Manager	8%	6%	3%	4%	2%	10%	20%	14%		
	Self-employed	8%		3%	2%	11%	10%	16%	11%		
	Homemaker	5%		6%	9%	4%	3%	8%	3%	22%	
	Skilled worker	4%		6%	4%	6%	6%	2%			
	Other	4%	12%	6%	2%	2%	5%	2%	3%		
	Professional/ Specialist	3%			4%	4%	5%		11%		
	Student	3%	6%	3%					5%	44%	
	Freeter	3%	29%	8%		4%					
	Teacher	2%			2%	4%	2%	6%	3%		
	Unemployed	2%	6%	3%	2%					33%	
	Govt- office worker non-mgr	1%		3%	2%	2%	3%				
	Executive (30+ employees)	1%			4%		3%		3%		
	Govt- Manager	1%						4%	3%		
	Free-lancer	1%					2%	2%			
	Retired	0%		3%							
	Total	Count	334	17	36	46	53	62	50	37	9

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

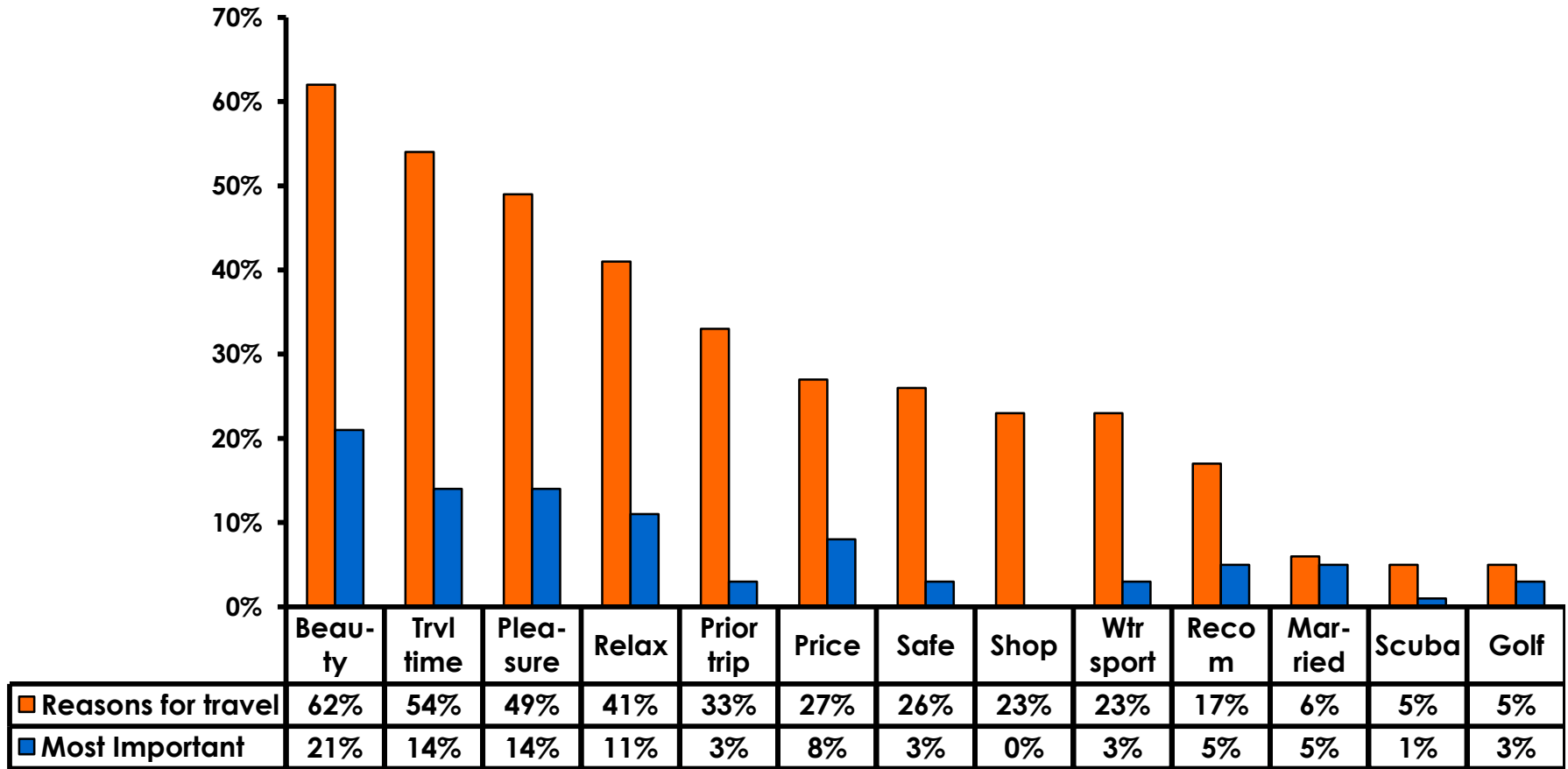


Accommodation by Income

Average length of stay: 2.98 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	12%	6%	17%	15%	25%	11%	8%	5%	11%	
	Guam Reef & Olive Spa	10%		9%	11%	15%	8%	10%	16%		
	Fiesta Resort Guam	9%	12%	14%	9%	2%	13%	12%	3%		
	Onward Beach Resort	8%	6%	6%	11%		10%	12%	14%	22%	
	Outrigger Guam Resort	6%	18%	3%	7%	2%	6%	8%	5%		
	Grand Plaza Hotel	6%		9%	4%	15%	3%	4%		11%	
	Hotel Nikko Guam	6%	6%	6%	11%	11%		6%	5%		
	Pacific Bay Hotel	5%	6%	6%	4%	8%	3%	4%		11%	
	Holiday Resort Guam	5%		9%	7%	4%	8%	4%	5%		
	Hilton Guam Resort	5%	18%			2%	3%	6%	11%		
	Sheraton Laguna Guam	4%	6%		7%	2%	3%	8%	5%		
	PIC Club	4%		3%	4%	4%	3%	2%	8%	11%	
	Bayview Hotel	3%	6%	9%	4%	2%	5%				
	Leo Palace Resort	3%	6%				5%	6%	11%		
	Westin Resort Guam	3%	6%			4%	5%	2%	5%		
	Other	2%					2%	2%		22%	
	Hyatt Regency Guam	2%		6%	2%	4%		2%			
	Aqua Suites	2%	6%		2%		2%			11%	
	Royal Orchid Guam	1%					3%		5%		
	Pacific Star Resort & Spa	1%			2%		3%				
	Oceanview Hotel	1%		3%			3%				
	Condo	1%						2%			
	Lotte Hotel Guam	1%		3%			2%				
	Hotel Santa Fe	0%				2%					
	Total	Count	350	17	35	46	53	63	49	37	9

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Short travel time,
- Pleasure

were the primary reasons for visiting during this period.

Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty	62%	66%	70%	57%	37%	60%	63%	
	Short travel time	54%	54%	57%	52%	47%	51%	57%	
	Pleasure	49%	57%	54%	43%	37%	42%	56%	
	Relax	41%	41%	46%	38%	30%	38%	43%	
	Previous trip	33%	14%	33%	42%	35%	39%	26%	
	Price	27%	27%	31%	27%	14%	25%	28%	
	Safe	26%	23%	24%	31%	26%	23%	29%	
	Shopping	23%	30%	24%	20%	21%	21%	25%	
	Water sports	23%	25%	26%	21%	14%	23%	23%	
	Recomm- friend/family/trvl agnt	17%	16%	19%	19%	9%	13%	22%	
	Married/ Attn wedding	6%	7%	6%	1%	14%	9%	2%	
	Scuba	5%	4%	7%	3%	5%	5%	4%	
	Golf	5%		1%	7%	19%	9%		
	Company/ Business Trip	4%	7%	2%	7%		2%	6%	
	Other	4%	2%	1%	6%	9%	5%	3%	
	Honeymoon	4%	2%	6%	3%		5%	2%	
	Organized sports	2%	4%	1%	3%		3%	1%	
	Visit friends/ Relatives	2%	2%	3%		5%	3%	1%	
	Company Sponsored	1%	2%		2%		1%	1%	
	Career Cert/ Testing	0%			1%		1%		
	Total	Count	351	56	150	101	43	173	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	62%	59%	56%	54%	62%	65%	61%	76%	78%	
	Short travel time	54%	53%	58%	46%	47%	56%	65%	57%	56%	
	Pleasure	49%	47%	47%	46%	49%	46%	59%	54%	56%	
	Relax	41%	41%	31%	39%	43%	44%	49%	49%	44%	
	Previous trip	33%	24%	31%	24%	32%	41%	41%	35%	22%	
	Price	27%	29%	28%	24%	30%	21%	35%	27%	33%	
	Safe	26%	12%	22%	17%	32%	27%	39%	27%	22%	
	Shopping	23%	29%	36%	15%	28%	19%	29%	16%	22%	
	Water sports	23%	24%	31%	13%	15%	29%	20%	24%	33%	
	Recomm- friend/family/trvl agnt	17%	47%	14%	13%	21%	16%	16%	14%	11%	
	Married/ Attn wedding	6%	12%	14%	4%		3%	8%	5%		
	Scuba	5%	6%	3%	7%	8%	6%	2%	5%	11%	
	Golf	5%	6%			4%	10%	6%	5%	11%	
	Company/ Business Trip	4%	6%	3%	9%	8%			3%		
	Other	4%				8%	2%		14%	11%	
	Honeymoon	4%	12%	6%	11%		5%	2%			
	Organized sports	2%			2%	4%	2%	4%	3%		
	Visit friends/ Relatives	2%				6%	2%	4%			
	Company Sponsored	1%					3%				
	Career Cert/ Testing	0%							3%		
	Total	Count	351	17	36	46	53	63	49	37	9

SECTION 3 **EXPENDITURES**

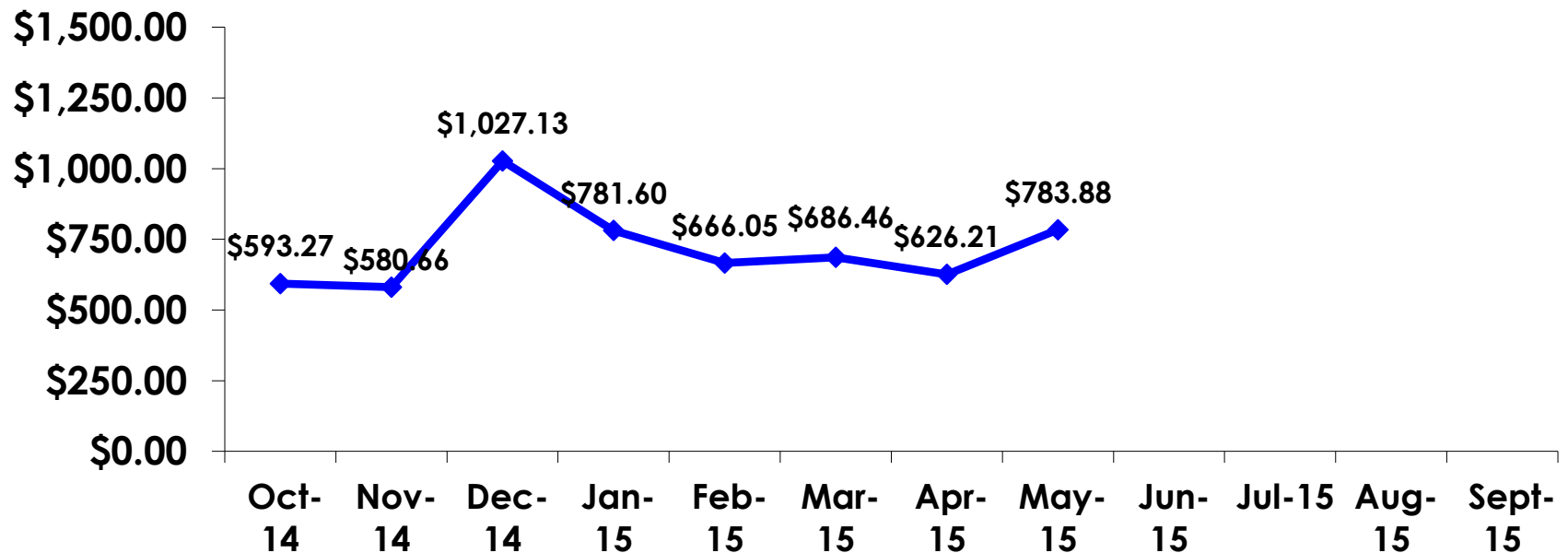
Prepaid Expenditures

¥119.76/US\$1

- \$1,455.37 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$16,700 = maximum (highest amount recorded for the entire sample)
- \$783.88 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$718.22

Breakdown of Prepaid Expenditures

¥119.76=\$1

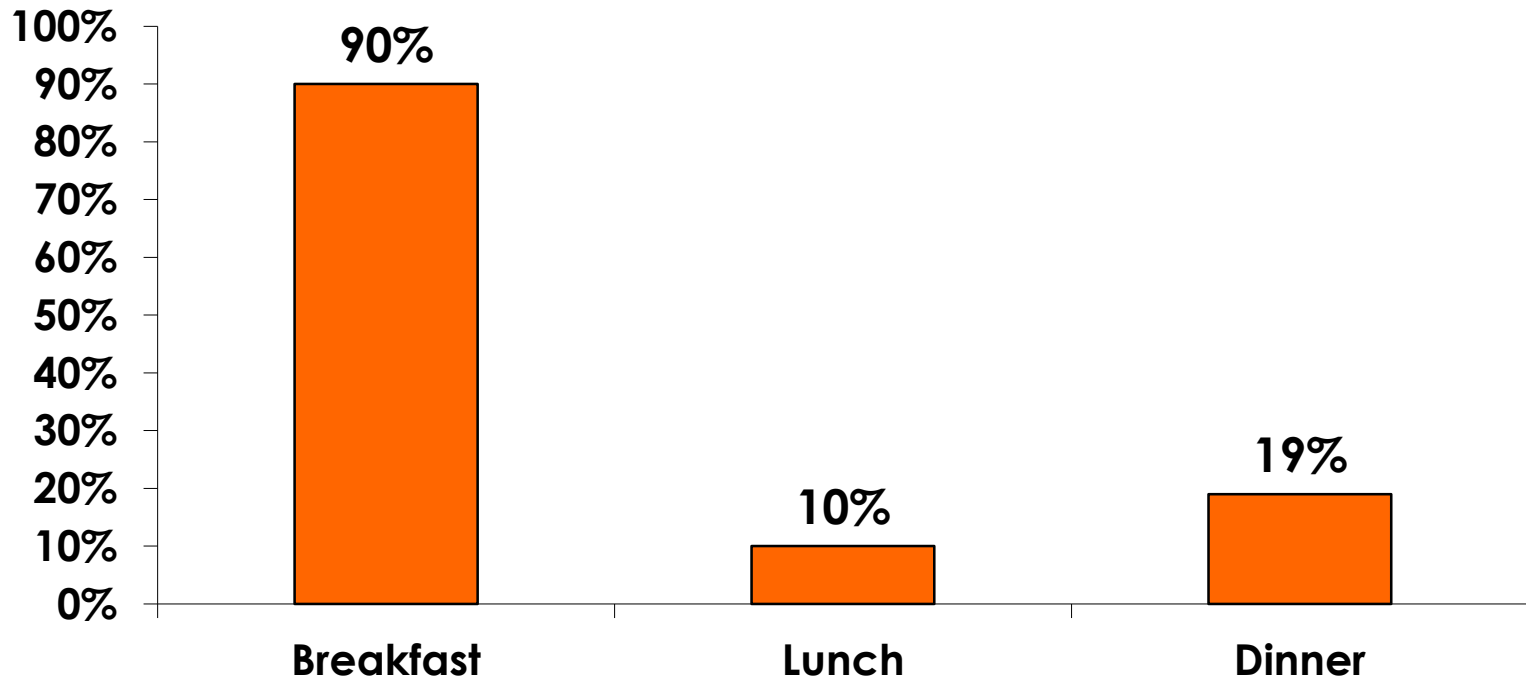
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,449.88
Air & Accommodation w/ daily meal package	\$3,441.78
Air only	\$1,097.37
Accommodation only	\$715.53
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation – Japan	\$74.41
Ground transportation – Guam	\$66.80
Optional tours/ activities	\$244.21
Other expenses	\$425.55
Total Prepaid	\$1,455.37

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=31

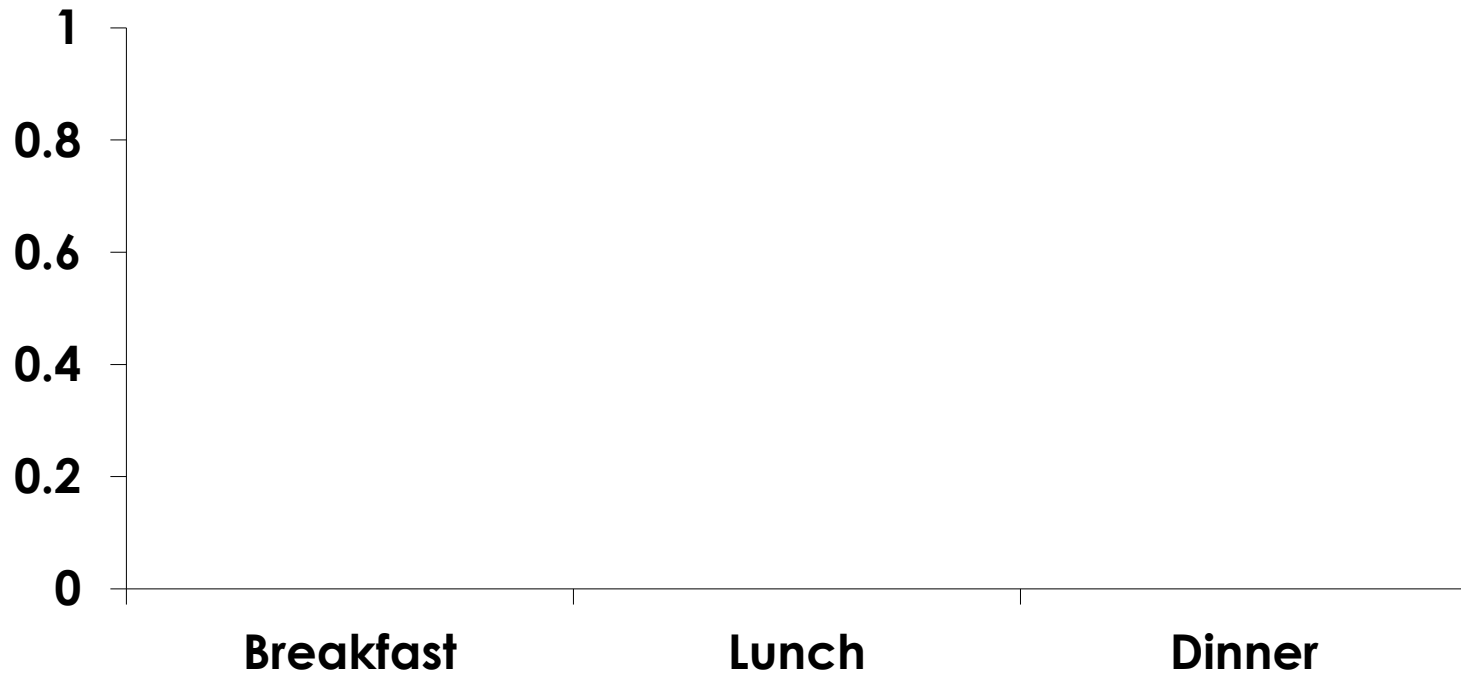


Mean=\$3,441.78 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

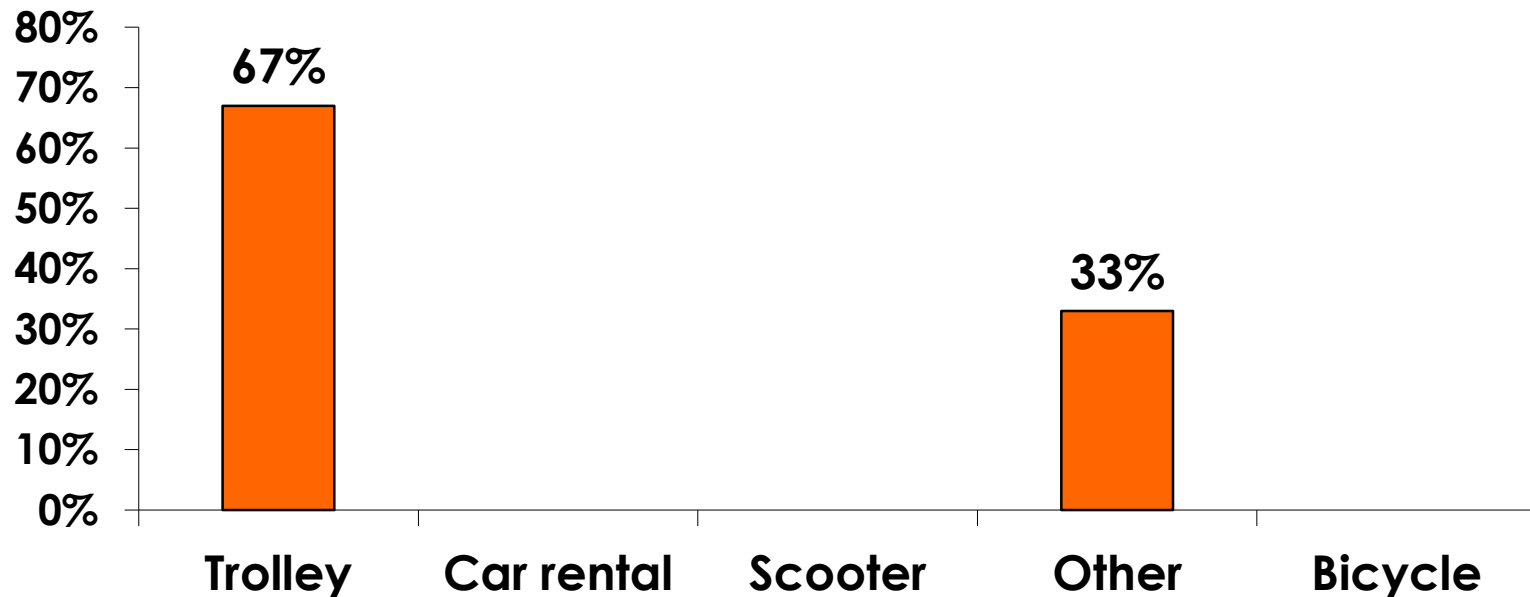
n=x



Mean=\$xxx per travel party

PREPAID GROUND TRANSPORTATION

n=3



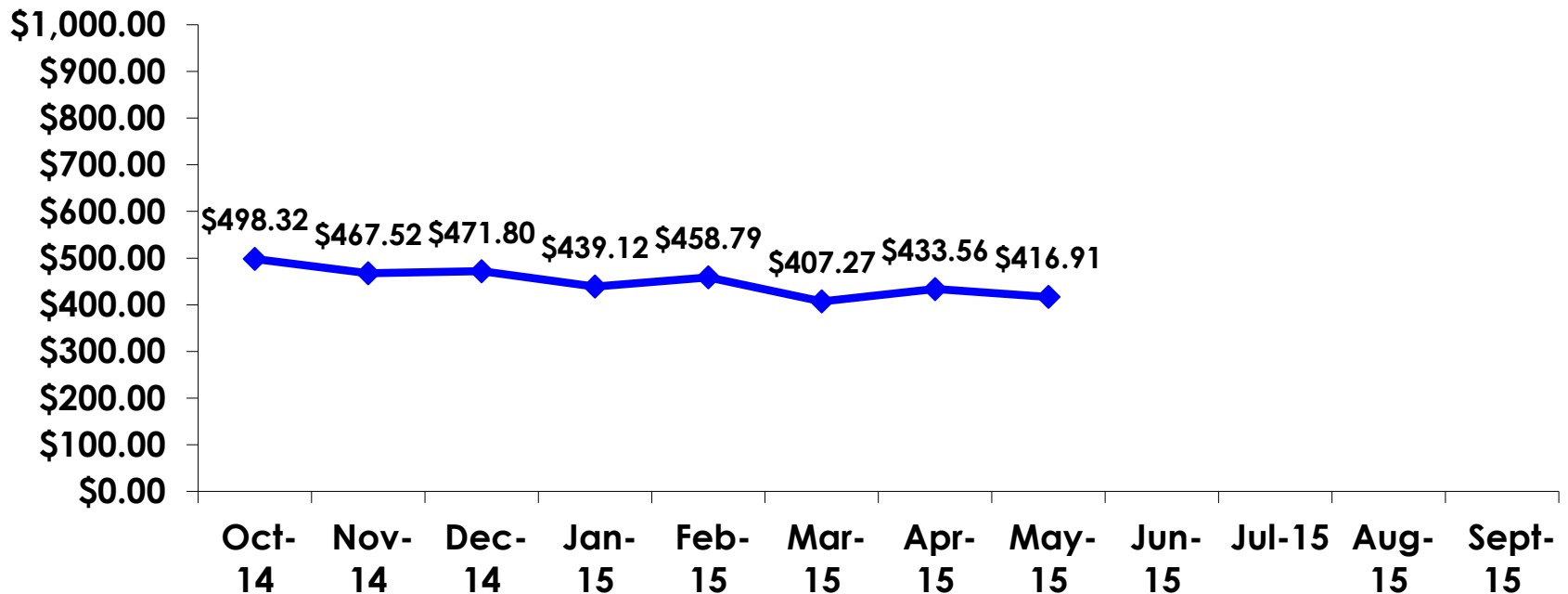
Mean=\$66.80 per travel party

On-Island Expenditures

- \$705.54 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$9,000 = Maximum (highest amount recorded for the entire sample)
- \$416.91 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

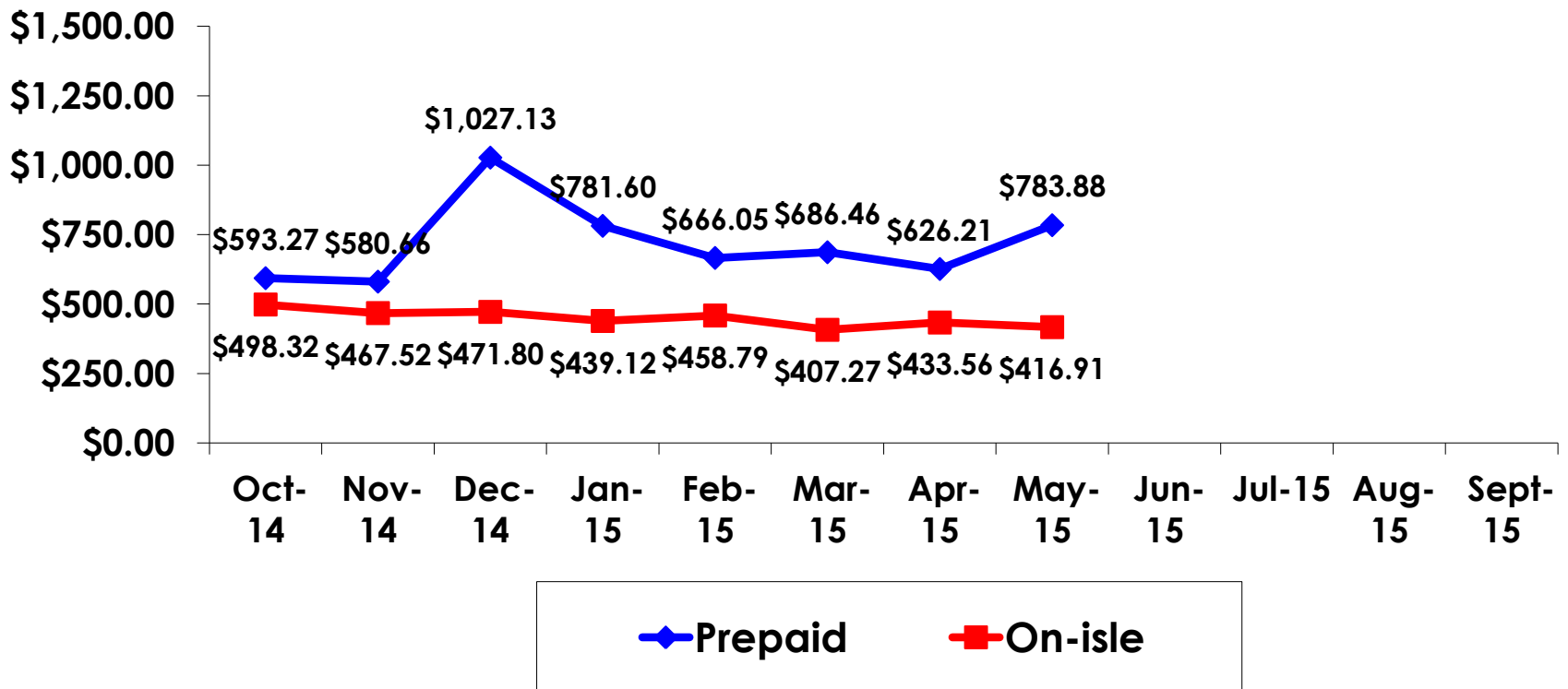


YTD = \$449.11

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$718.22

On-Isle YTD = \$449.11



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	\$416.91	\$466.65	\$368.29	\$316.60	\$435.70	\$446.12	\$650.33	\$375.67	\$330.79	\$407.97	\$506.65
	Median	\$332	\$325	\$333	\$275	\$313	\$333	\$315	\$395	\$300	\$375	\$438
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$4,300	\$4,300	\$1,500	\$800	\$2,000	\$3,000	\$4,300	\$1,100	\$1,000	\$1,200	\$1,500

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$29.90	\$37.44	\$22.52	\$11.80	\$30.33	\$41.17	\$26.16
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$32.94	\$42.90	\$23.21	\$25.18	\$27.98	\$43.88	\$35.09
	Median	\$0	\$18	\$0	\$0	\$0	\$10	\$15
F&B RESTRNT	Mean	\$96.92	\$144.18	\$50.72	\$46.88	\$80.95	\$143.27	\$111.56
	Median	\$24	\$100	\$0	\$0	\$20	\$90	\$30
OPT TOUR	Mean	\$62.93	\$79.30	\$46.93	\$31.25	\$51.57	\$101.88	\$54.09
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$126.22	\$147.46	\$105.46	\$94.57	\$96.54	\$188.53	\$128.26
	Median	\$15	\$20	\$10	\$38	\$5	\$40	\$20
GIFT- OTHER	Mean	\$92.47	\$105.04	\$80.18	\$65.50	\$90.81	\$101.87	\$111.16
	Median	\$50	\$50	\$35	\$30	\$50	\$50	\$50
TRANS	Mean	\$18.46	\$28.71	\$8.44	\$9.66	\$12.61	\$30.39	\$22.86
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$242.55	\$362.67	\$125.13	\$135.80	\$164.30	\$276.67	\$581.84
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$705.54	\$956.41	\$460.30	\$425.75	\$548.99	\$927.08	\$1,112.88
	Median	\$500	\$660	\$400	\$398	\$400	\$680	\$670

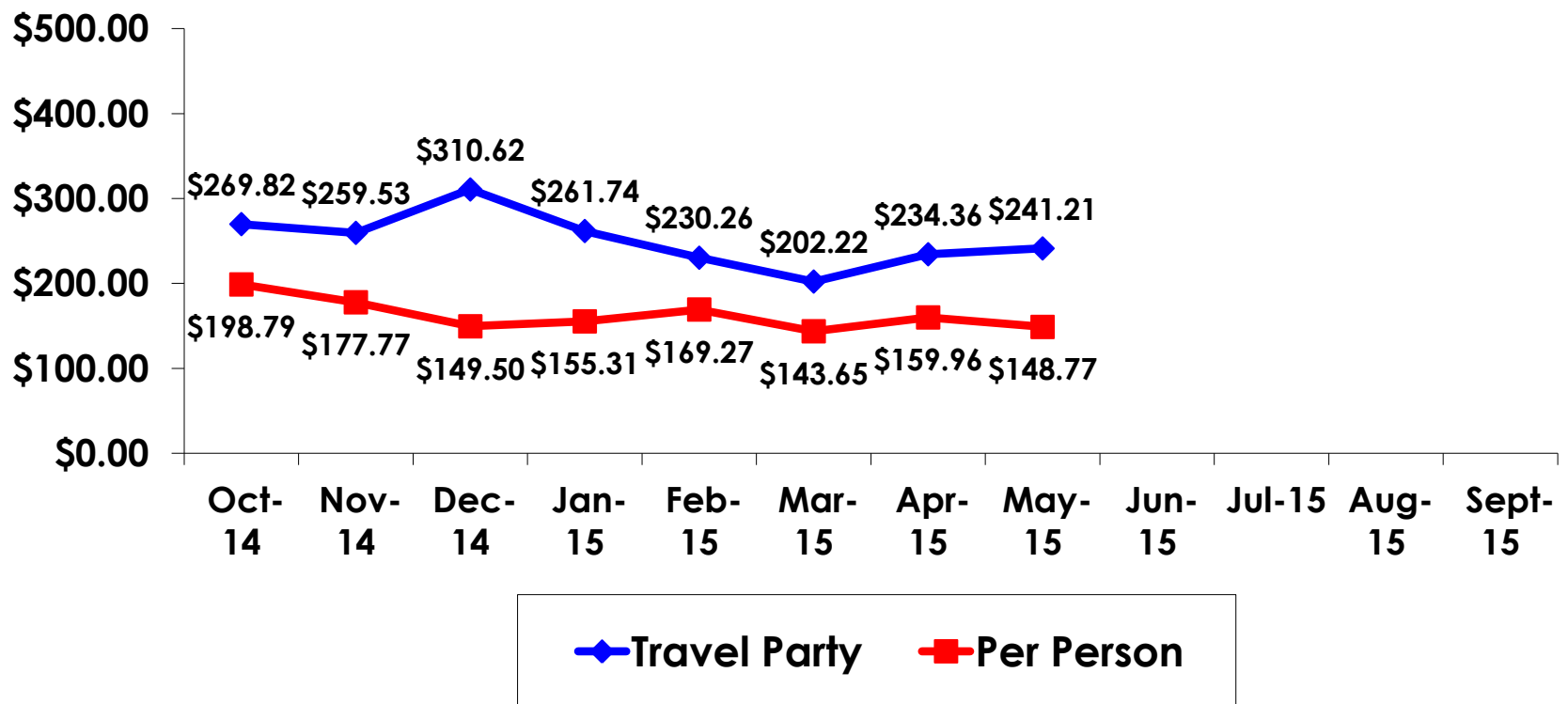
On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$29.90	\$22.51	\$39.92
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$32.94	\$29.25	\$37.86
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$96.92	\$92.59	\$102.85
	Median	\$24	\$21	\$29
OPT TOUR	Mean	\$62.93	\$56.09	\$71.69
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$126.22	\$102.04	\$159.38
	Median	\$15	\$30	\$0
GIFT- OTHER	Mean	\$92.47	\$89.09	\$97.10
	Median	\$50	\$50	\$35
TRANS	Mean	\$18.46	\$15.49	\$22.57
	Median	\$0	\$0	\$0
OTHER	Mean	\$242.55	\$186.64	\$318.57
	Median	\$0	\$0	\$0
TOTAL	Mean	\$705.54	\$597.94	\$851.68
	Median	\$500	\$440	\$500

ON-ISLE EXPENDITURES – Per Day

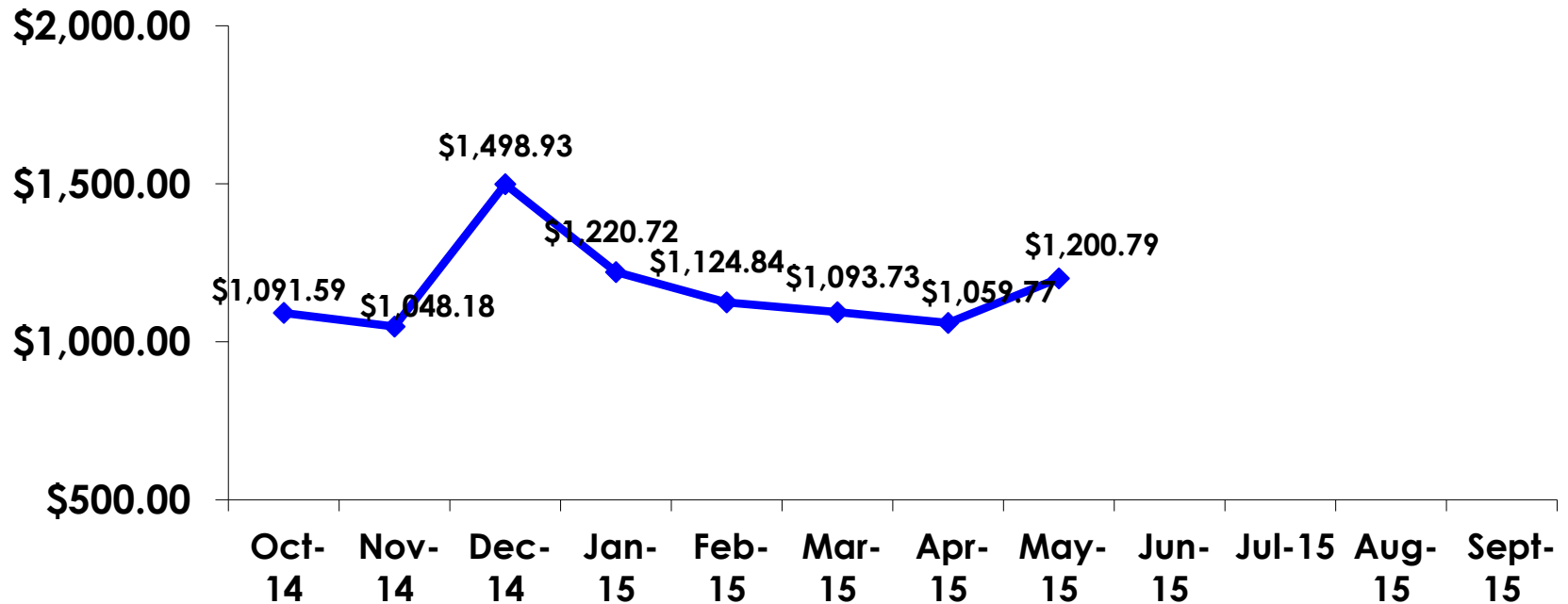
Travel Party YTD = \$251.17 Per Person YTD = \$162.84



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,200.79 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,646 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



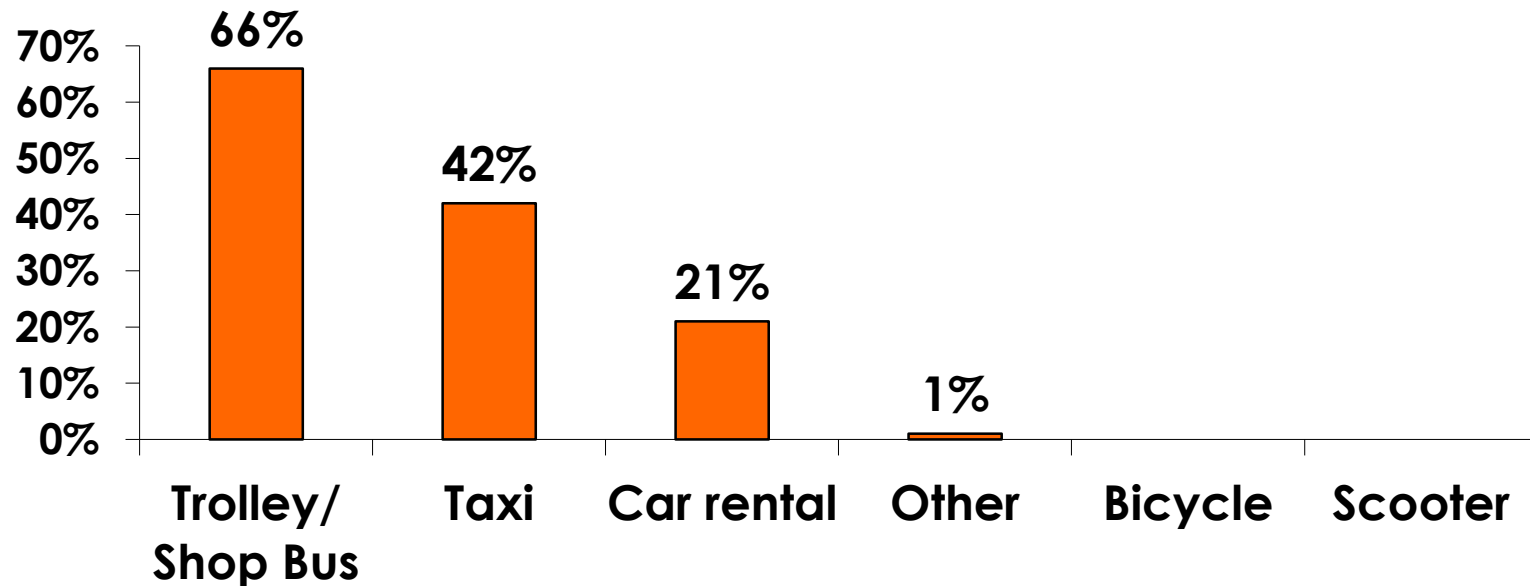
YTD=\$1,167.33

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$29.90
Food & beverage in fast food restaurant/convenience store	\$32.94
Food & beverage at restaurants or drinking establishments outside a hotel	\$96.92
Optional tours and activities	\$62.93
Gifts/ souvenirs for yourself/companions	\$126.22
Gifts/ souvenirs for friends/family at home	\$92.47
Local transportation	\$18.46
Other expenses not covered	\$242.55
Average Total	\$705.54

Local Transportation

n=97



Mean=\$18.46 per travel party

Guam Airport Expenditures

- \$32.61 = Mean
- \$10 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$700 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

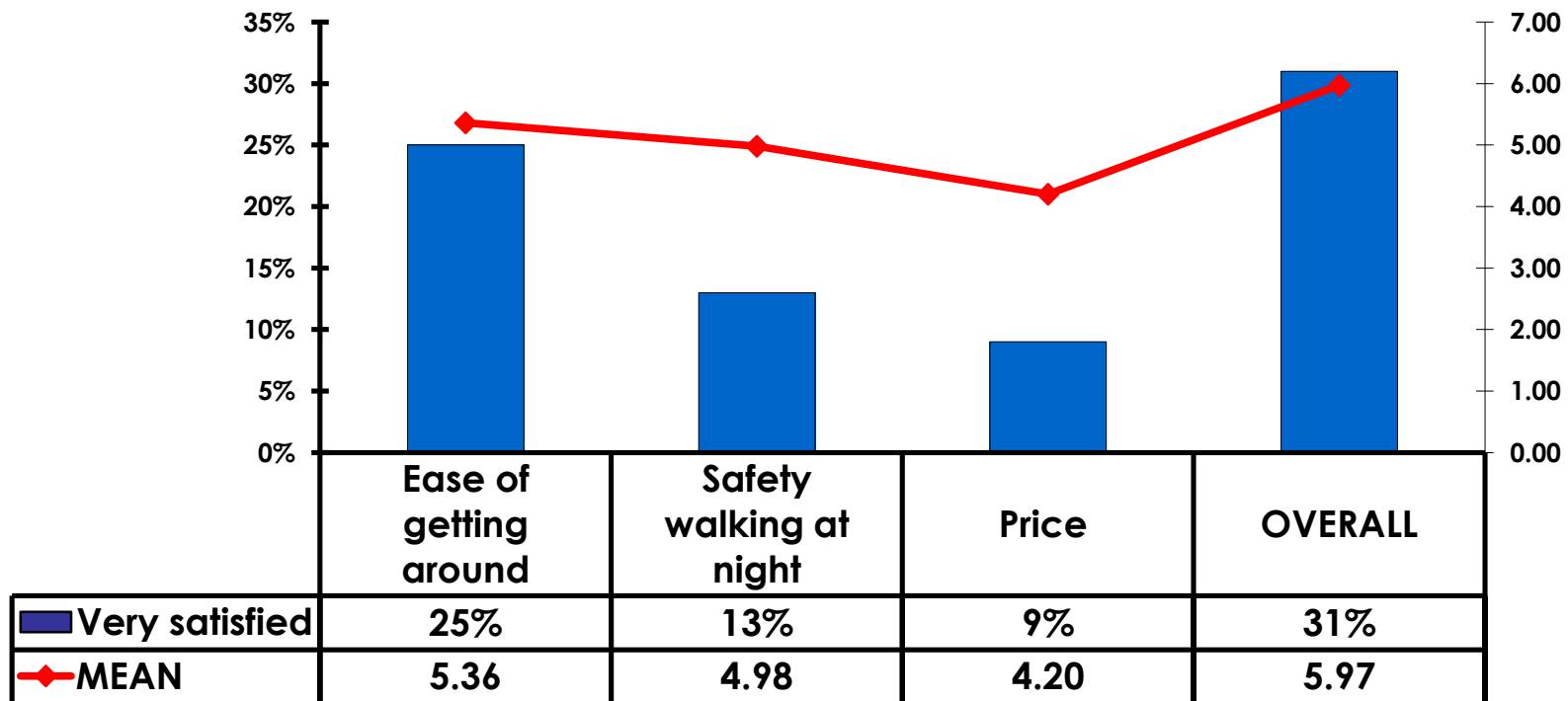
	MEAN \$
Food & Beverages	\$8.95
Gifts/Souvenirs Self	\$12.65
Gifts/Souvenirs Others	\$11.53
Total	\$32.61

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

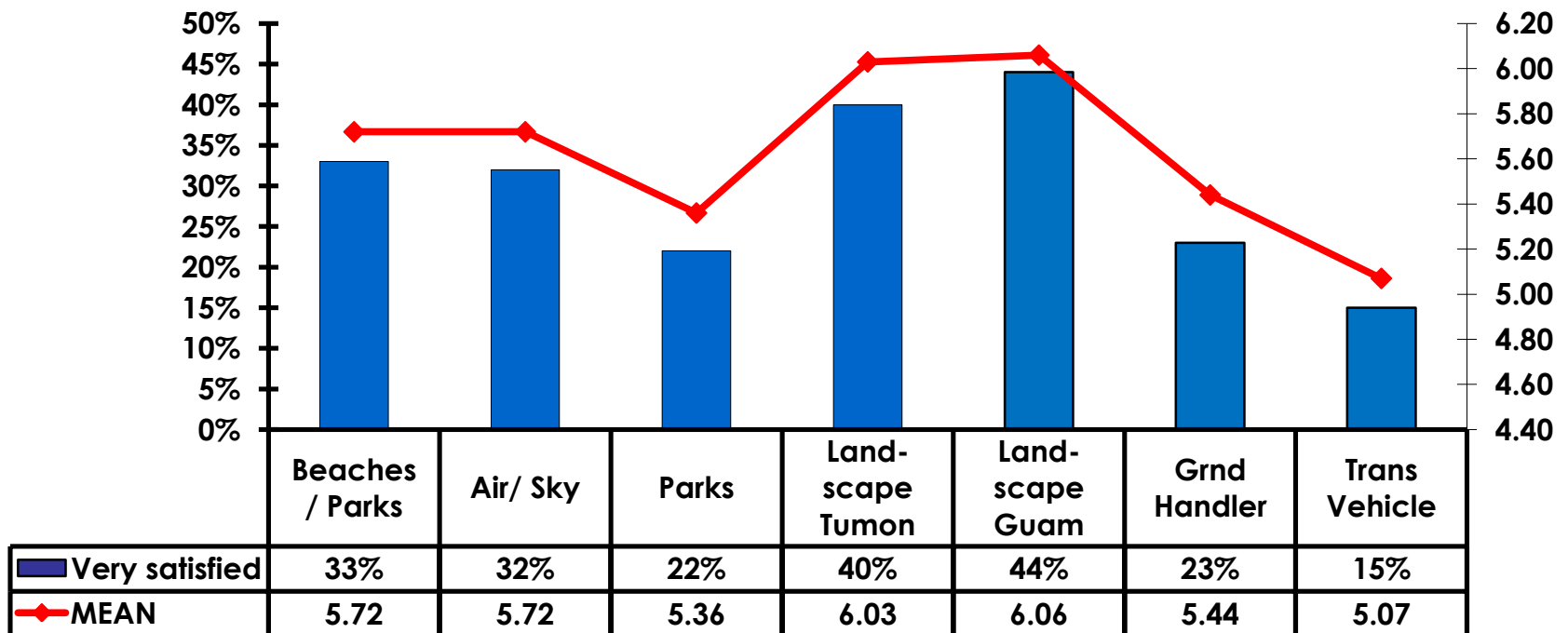
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

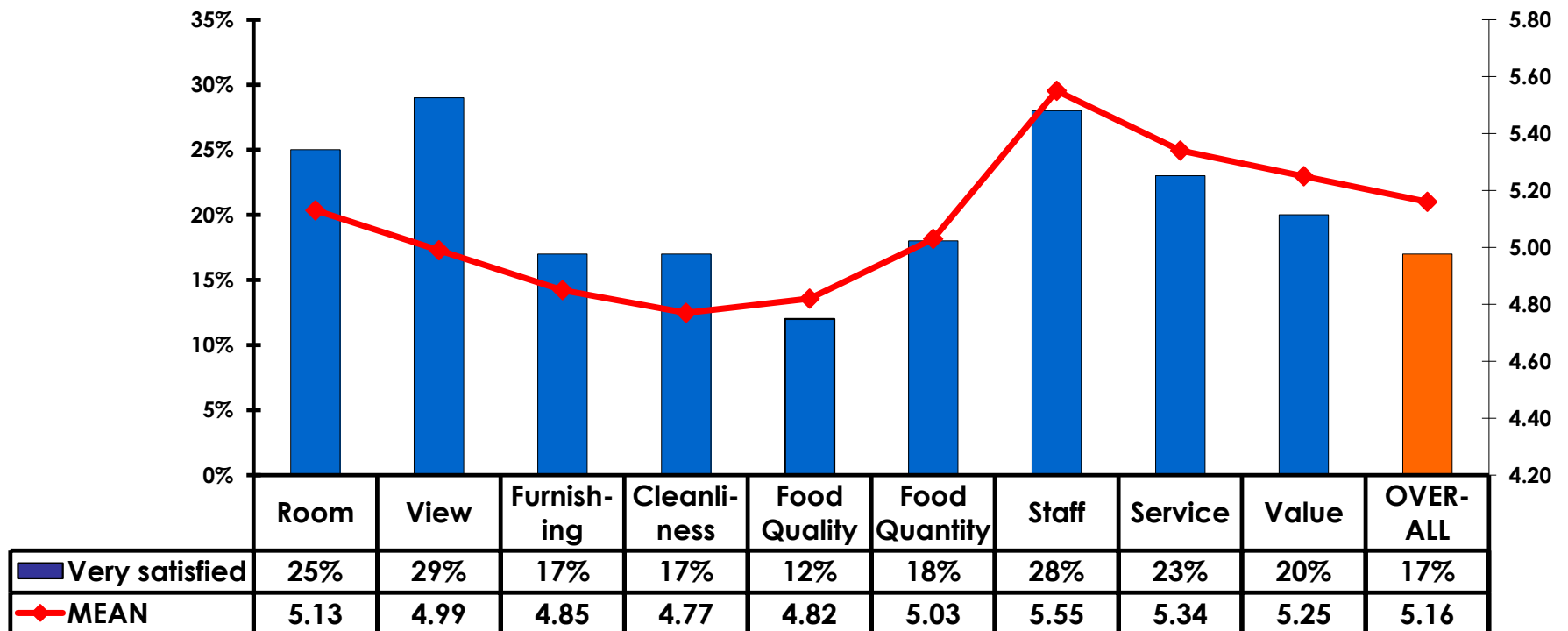
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

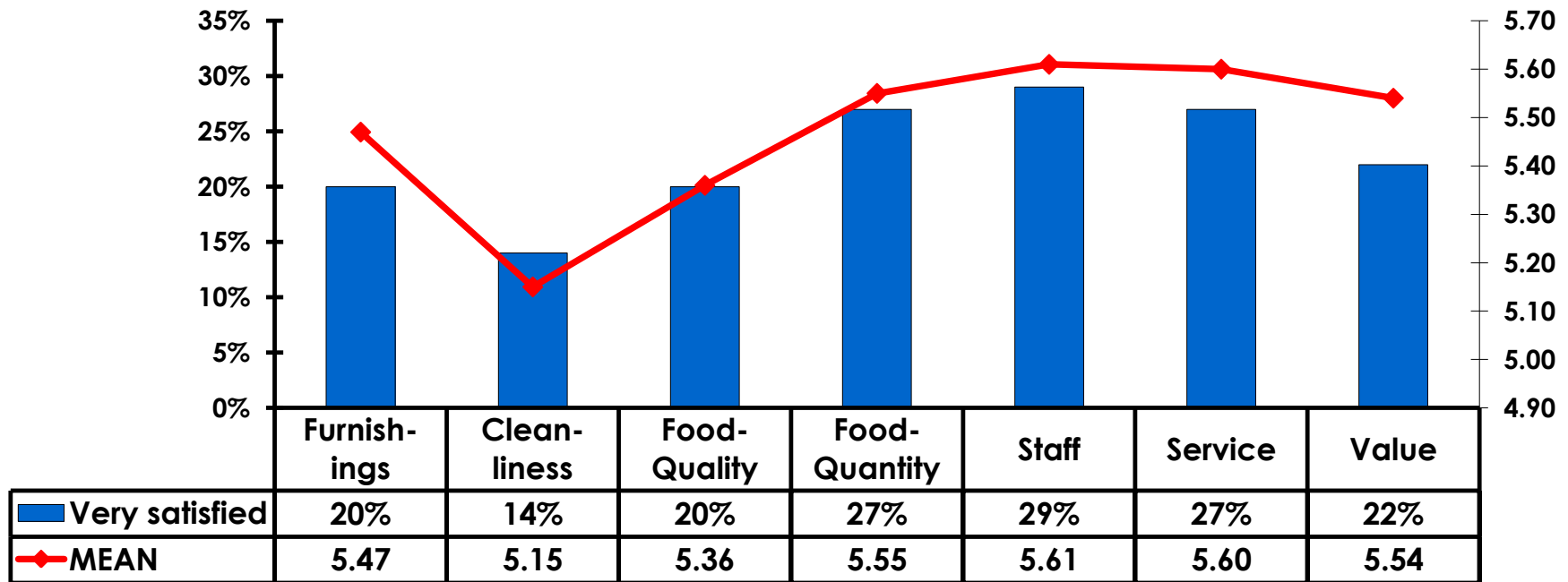
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

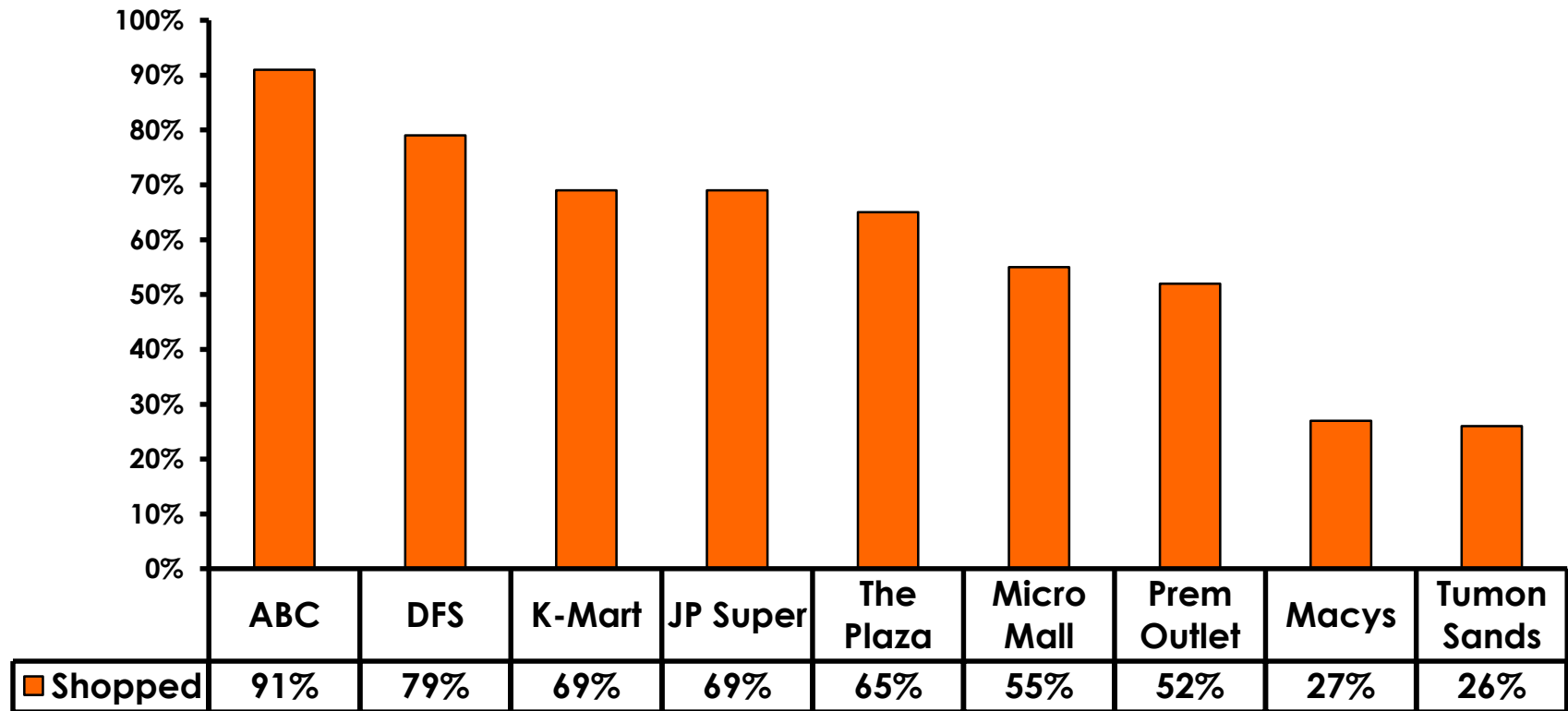
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



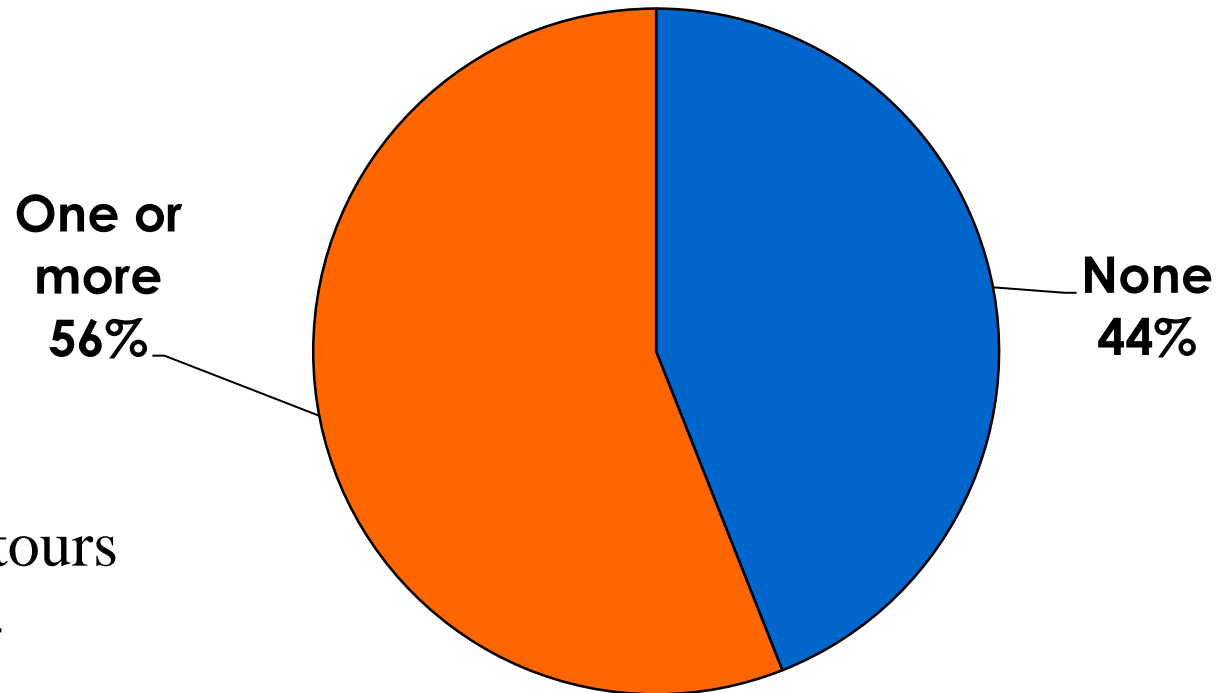
Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 49%	Score of 6 to 7 = 46%
Score of 4 to 5 = 45%	Score of 4 to 5 = 45%
Score 1 to 3 = 6%	Score 1 to 3 = 8%
MEAN = 5.32	MEAN = 5.20

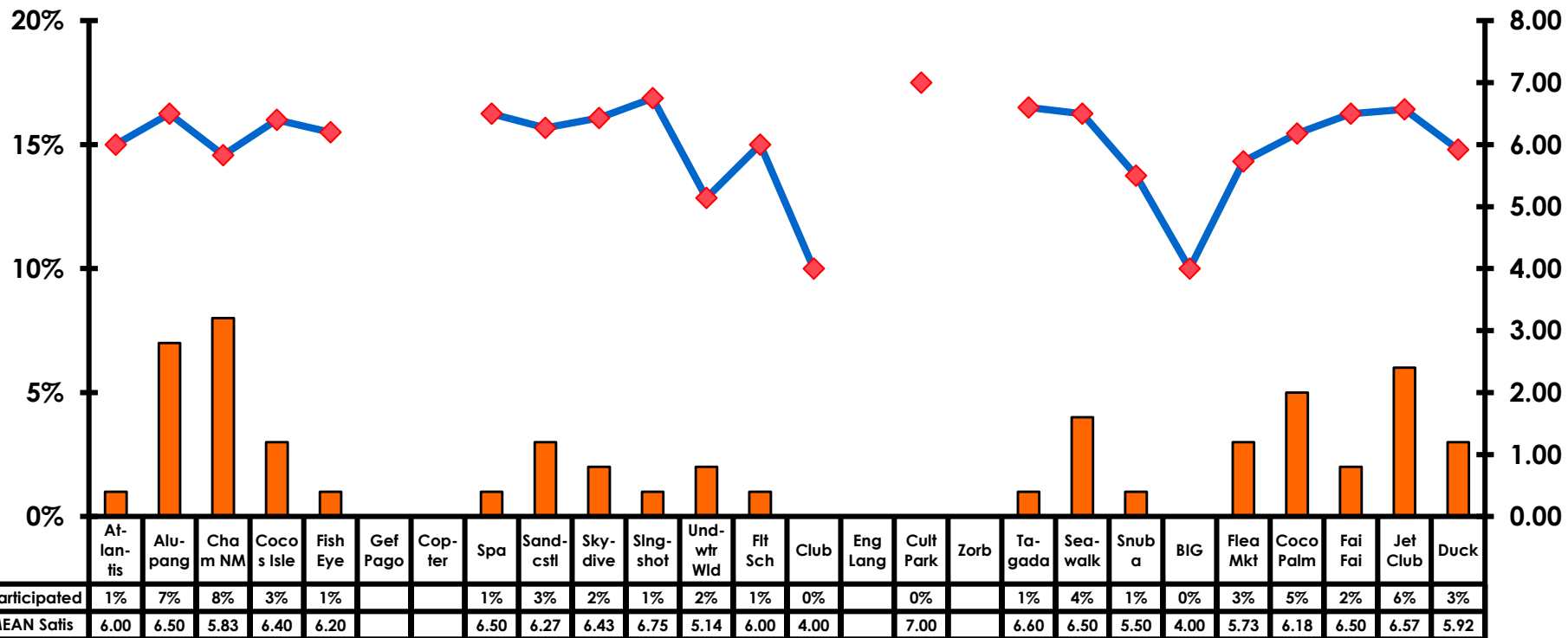
Optional Tour Participation



- Average number of tours participated in is .94

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 = 57%	Score of 6 to 7 = 56%
Score of 4 to 5 = 42%	Score of 4 to 5 = 43%
Score 1 to 3 = 1%	Score 1 to 3 = 1%
MEAN = 5.56	MEAN = 5.51

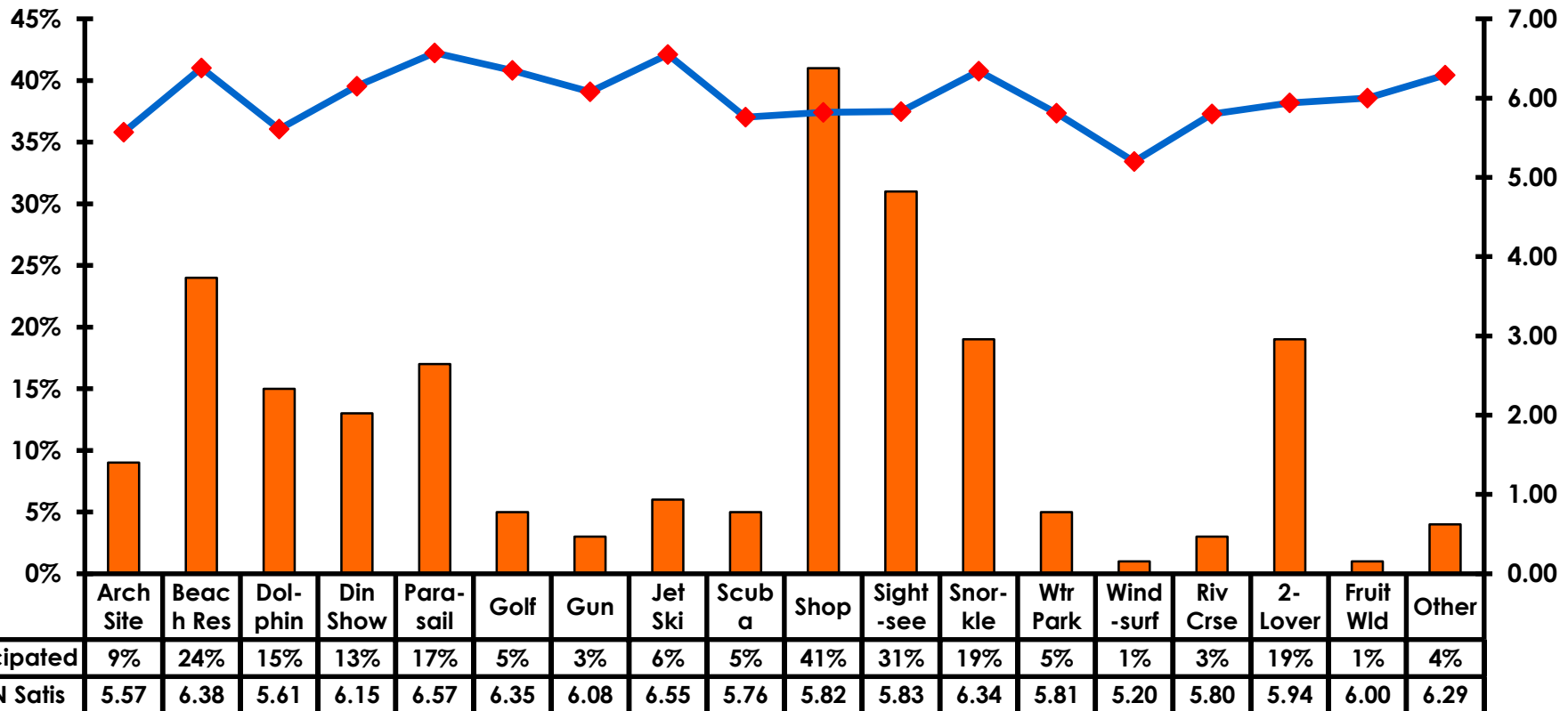
Night Tours Satisfaction

7pt Rating Scale

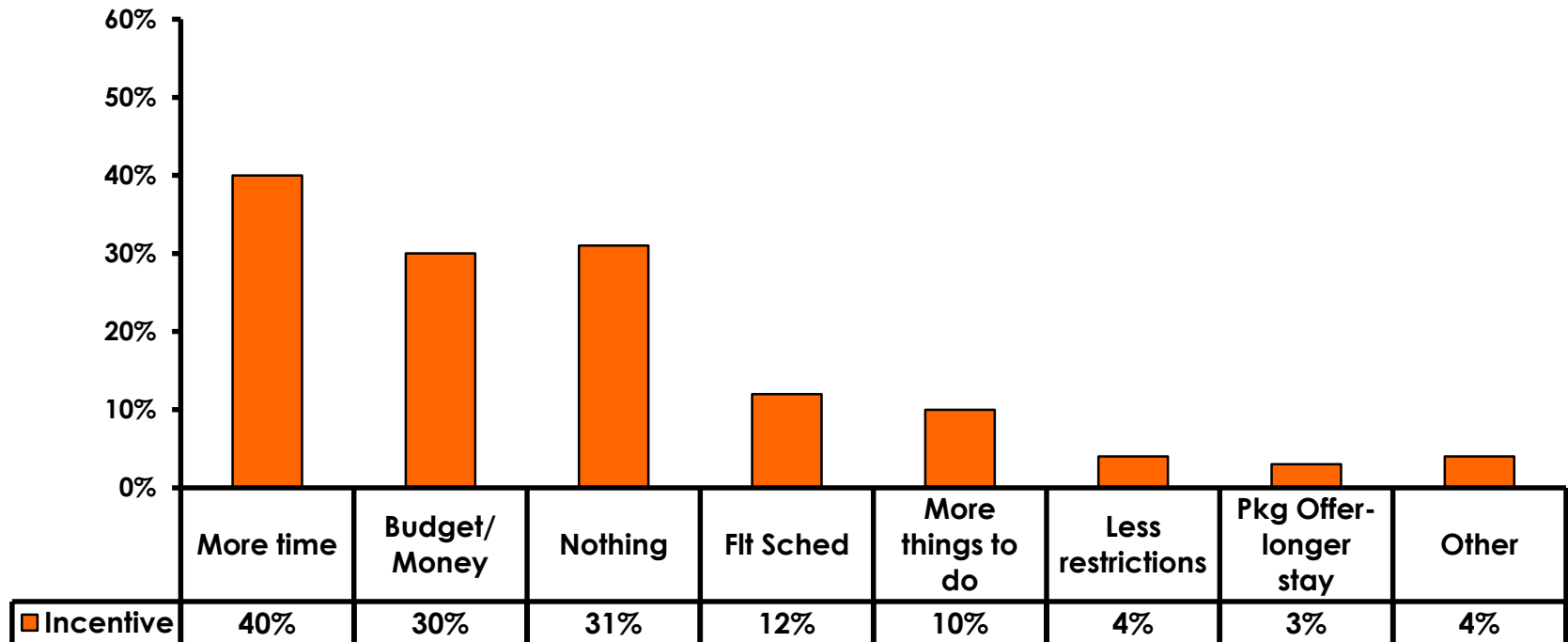
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 29%	Score of 6 to 7 = 28%
Score of 4 to 5 = 68%	Score of 4 to 5 = 68%
Score 1 to 3 = 2%	Score 1 to 3 = 2%
MEAN = 4.75	MEAN = 4.75

Satisfaction with Other Activities



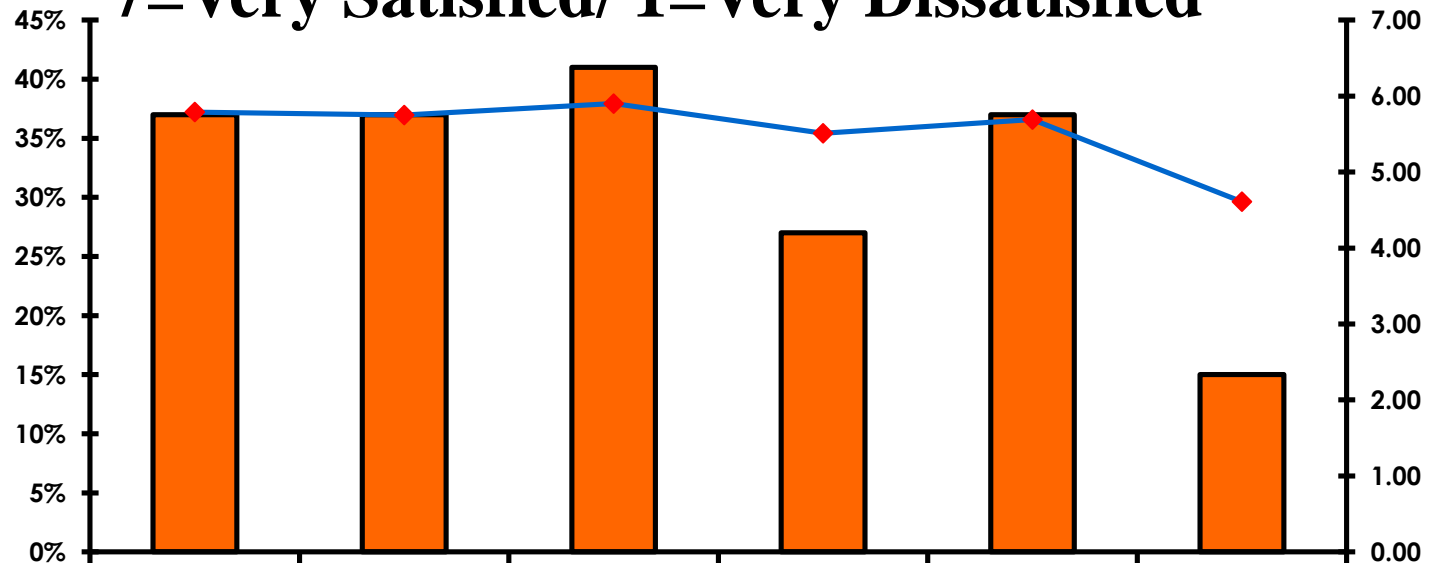
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

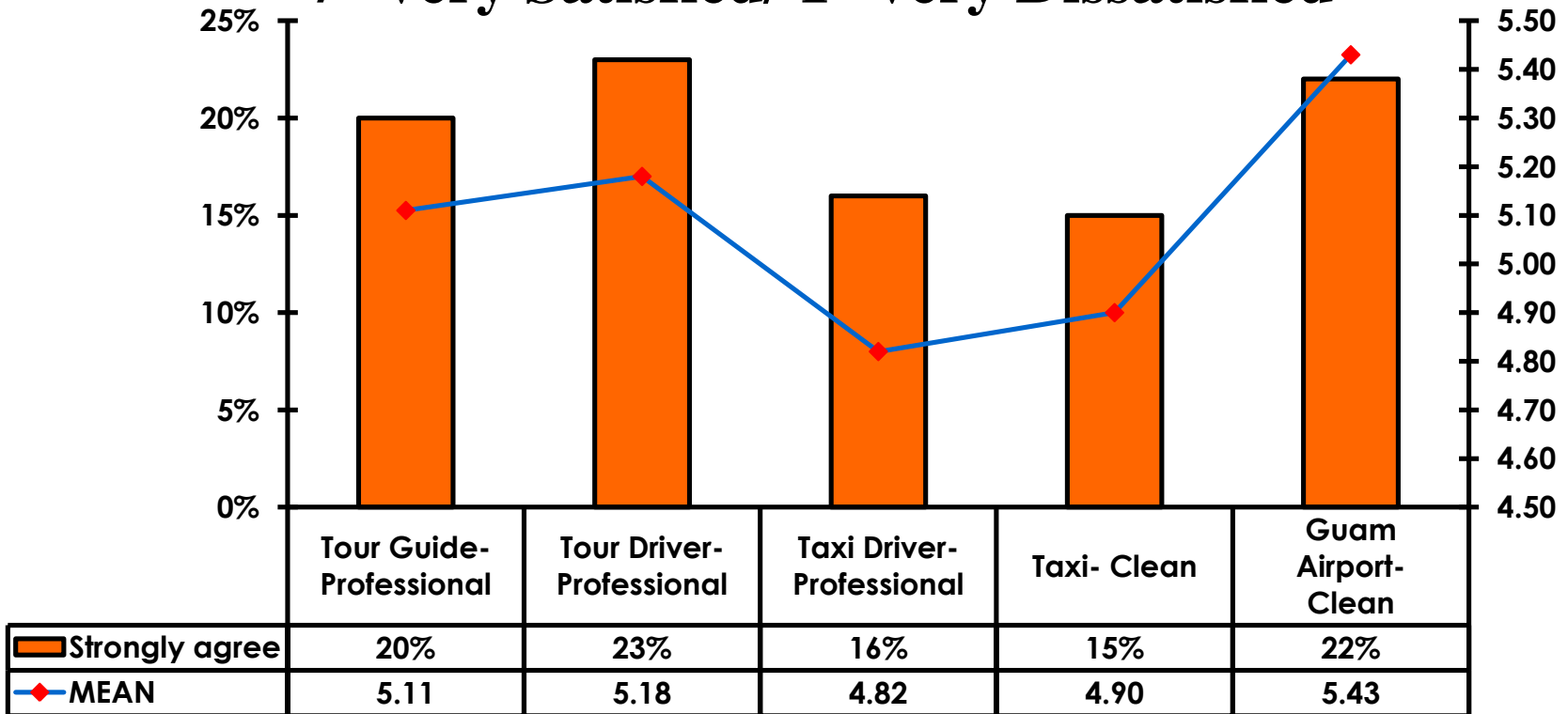


	Guam was better than expected	I had no communication problems	I will recommend Guam to friends	Sites on Guam were attractive	I plan to visit Guam again	Not enough night activities
Strongly agree	37%	37%	41%	27%	37%	15%
MEAN	5.79	5.75	5.90	5.51	5.69	4.61

On-Island Perceptions

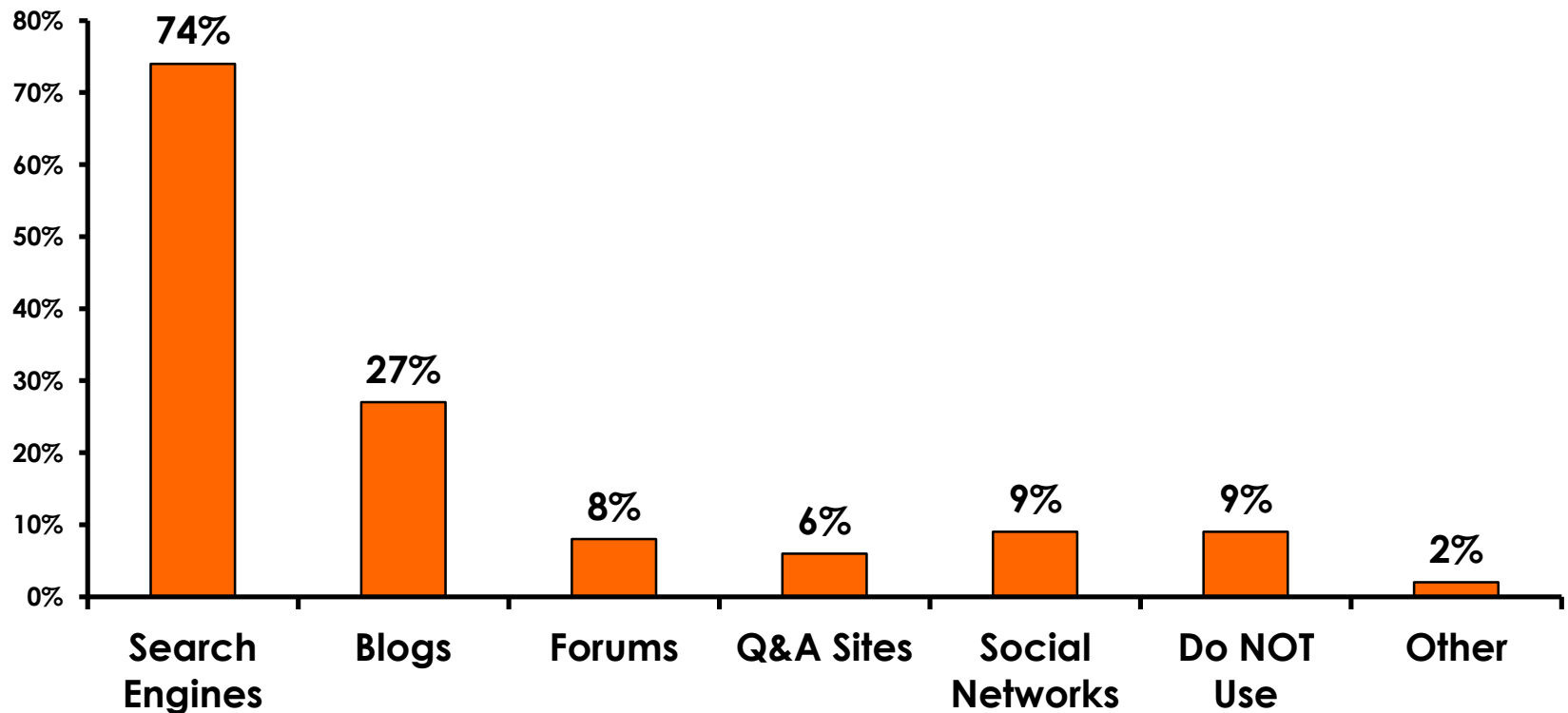
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



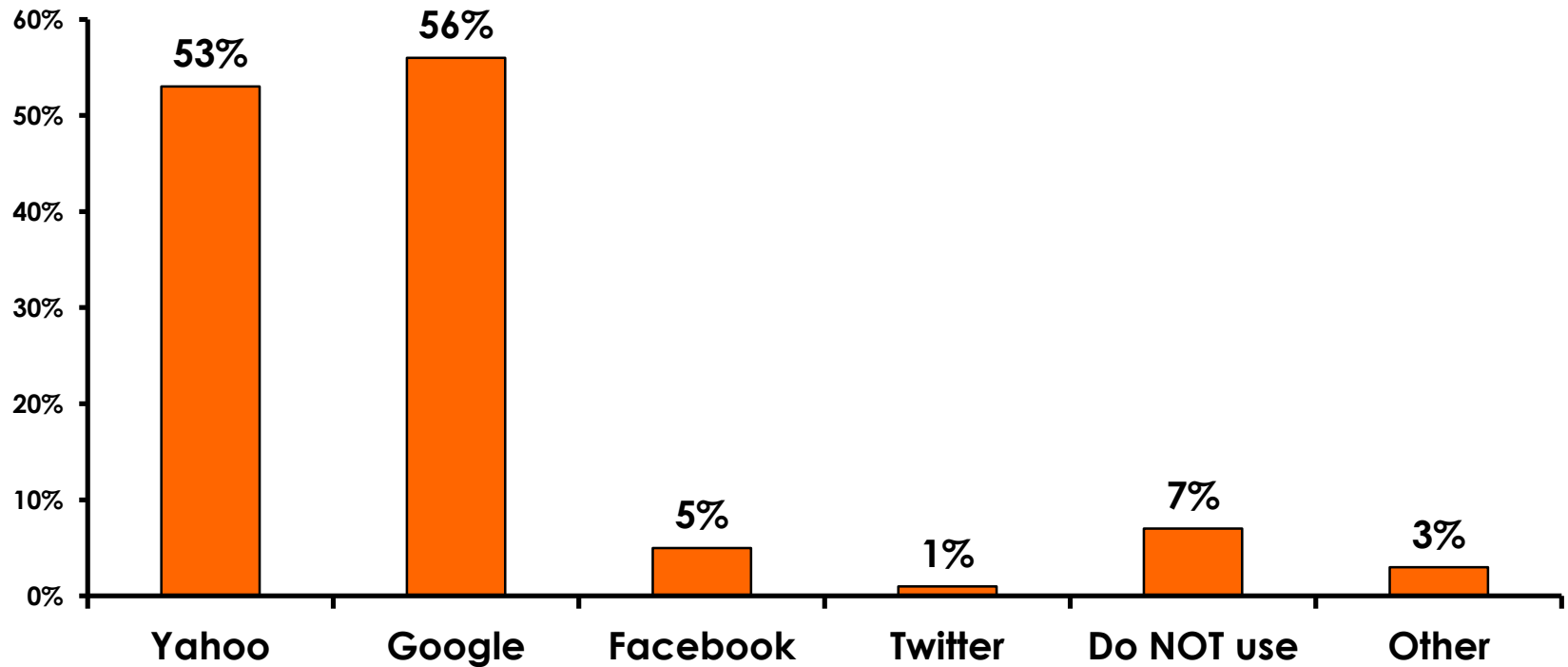
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

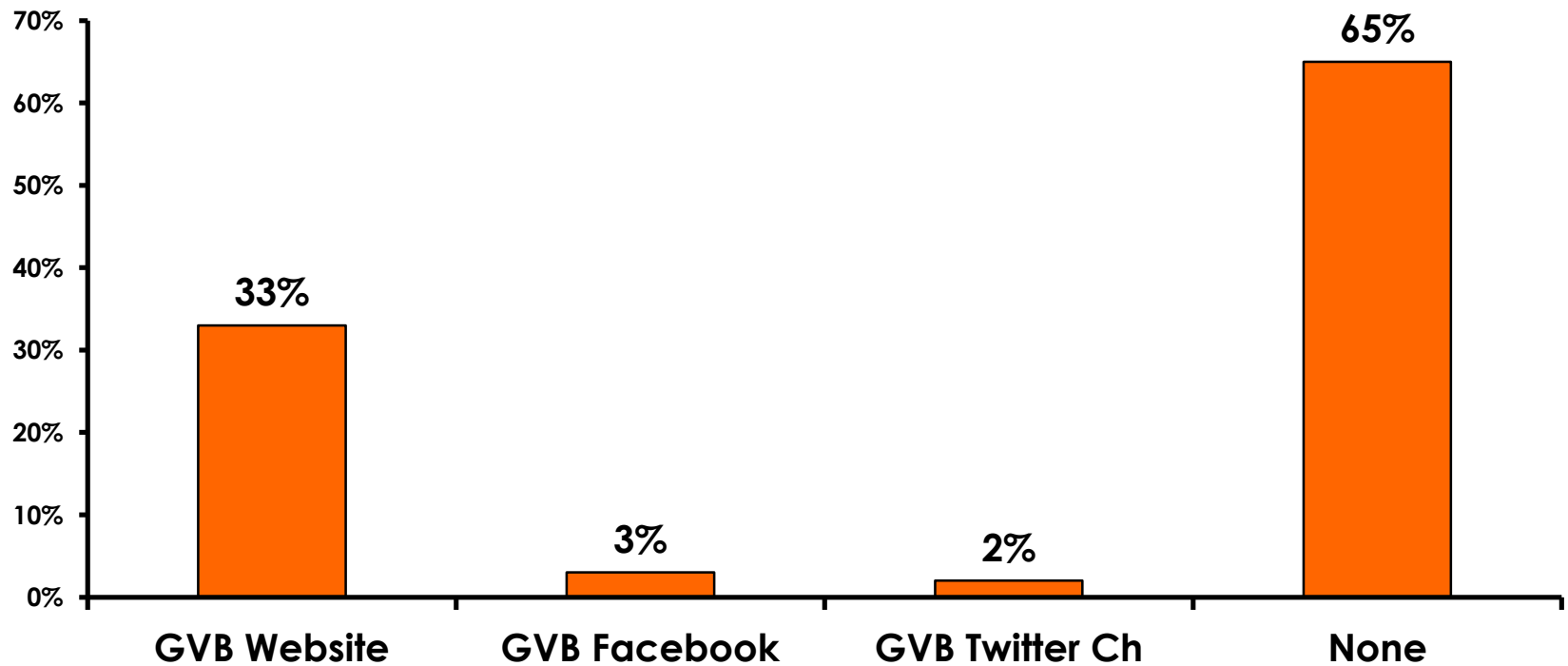


Internet- Things To Do

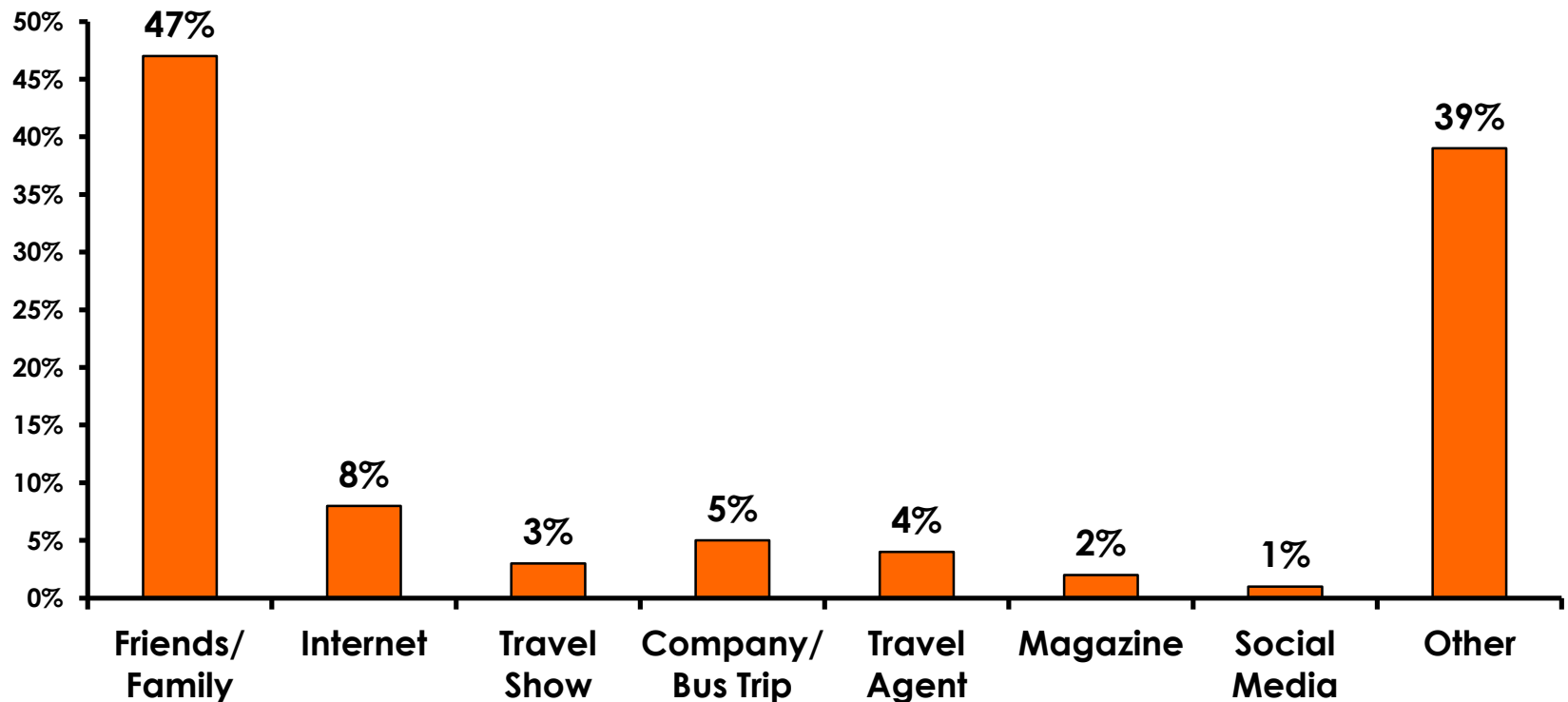
Sources of Info



Internet- GVB Sources

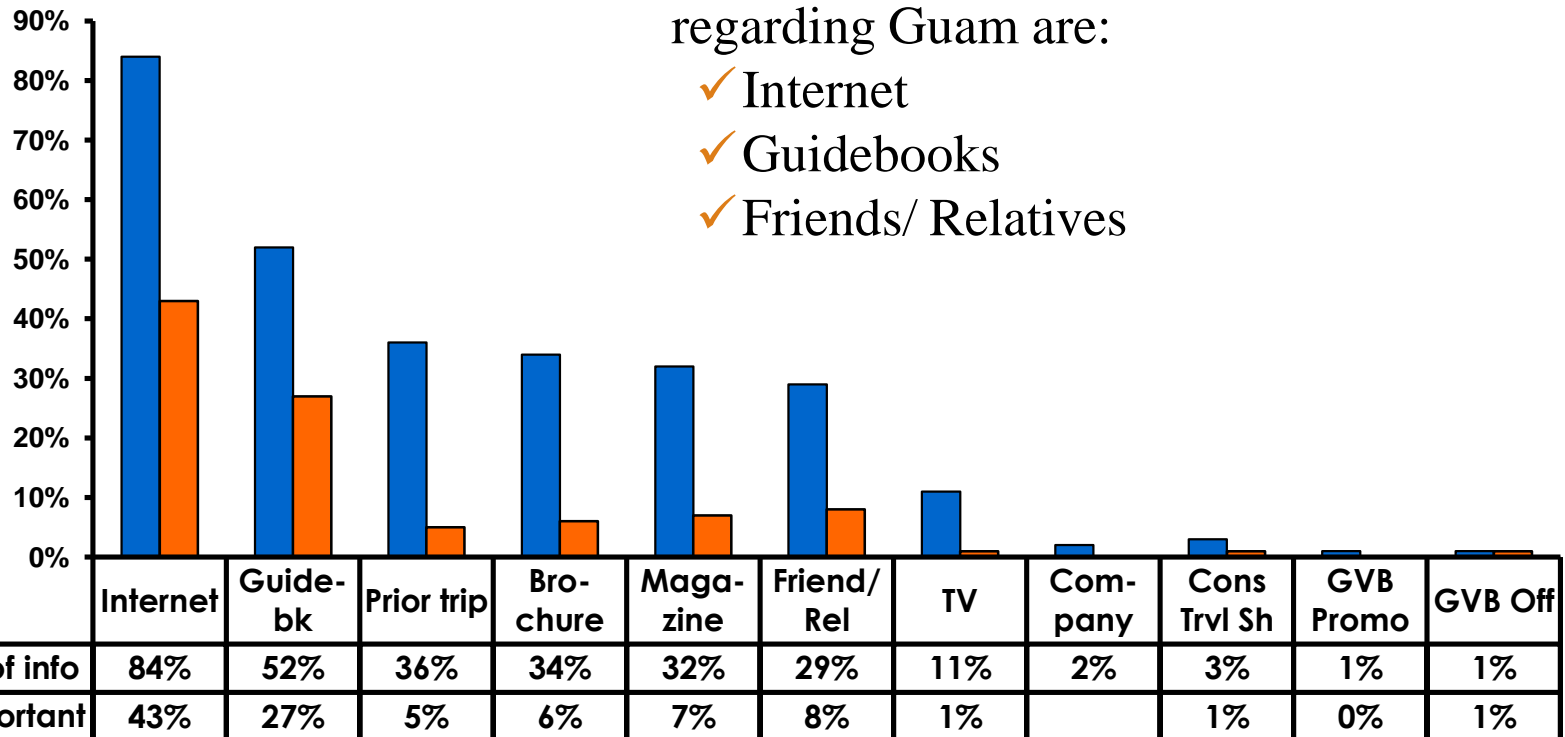


Travel Motivation- Info Sources



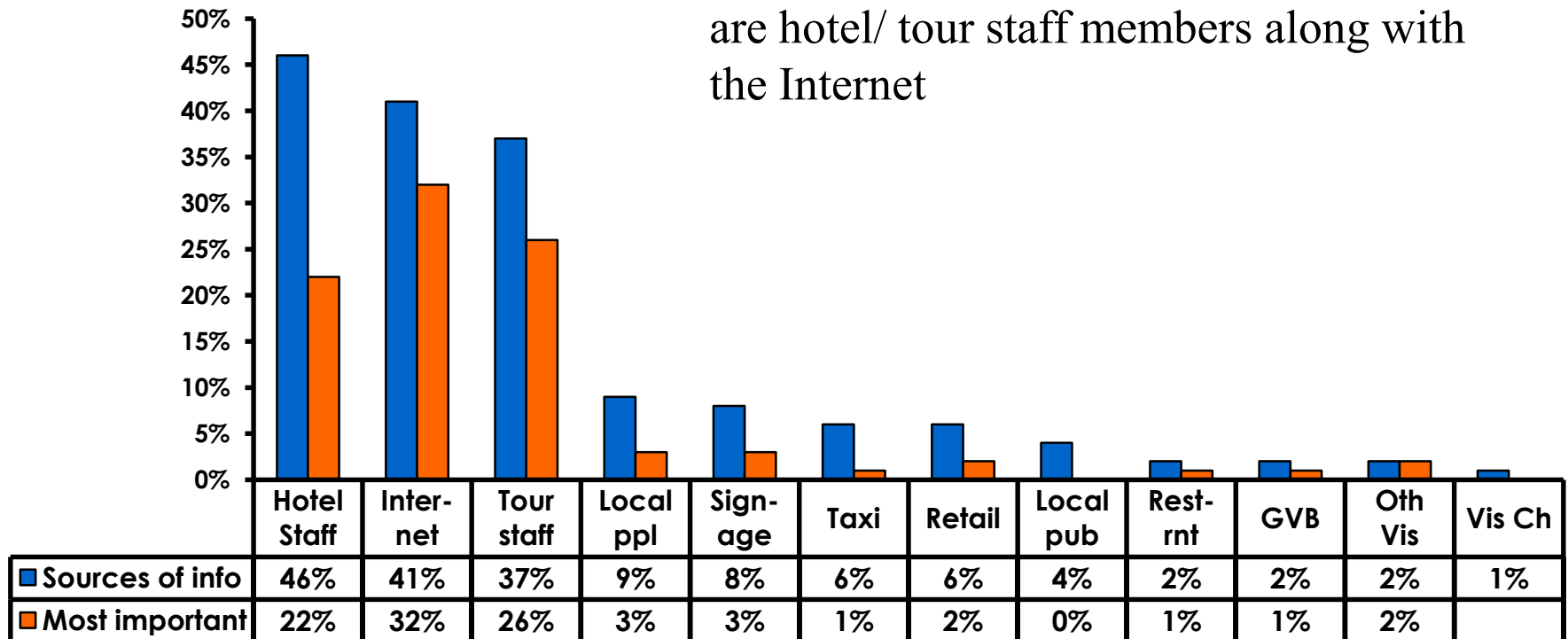
Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
 - ✓ Internet
 - ✓ Guidebooks
 - ✓ Friends/ Relatives



Sources of Information Post-arrival

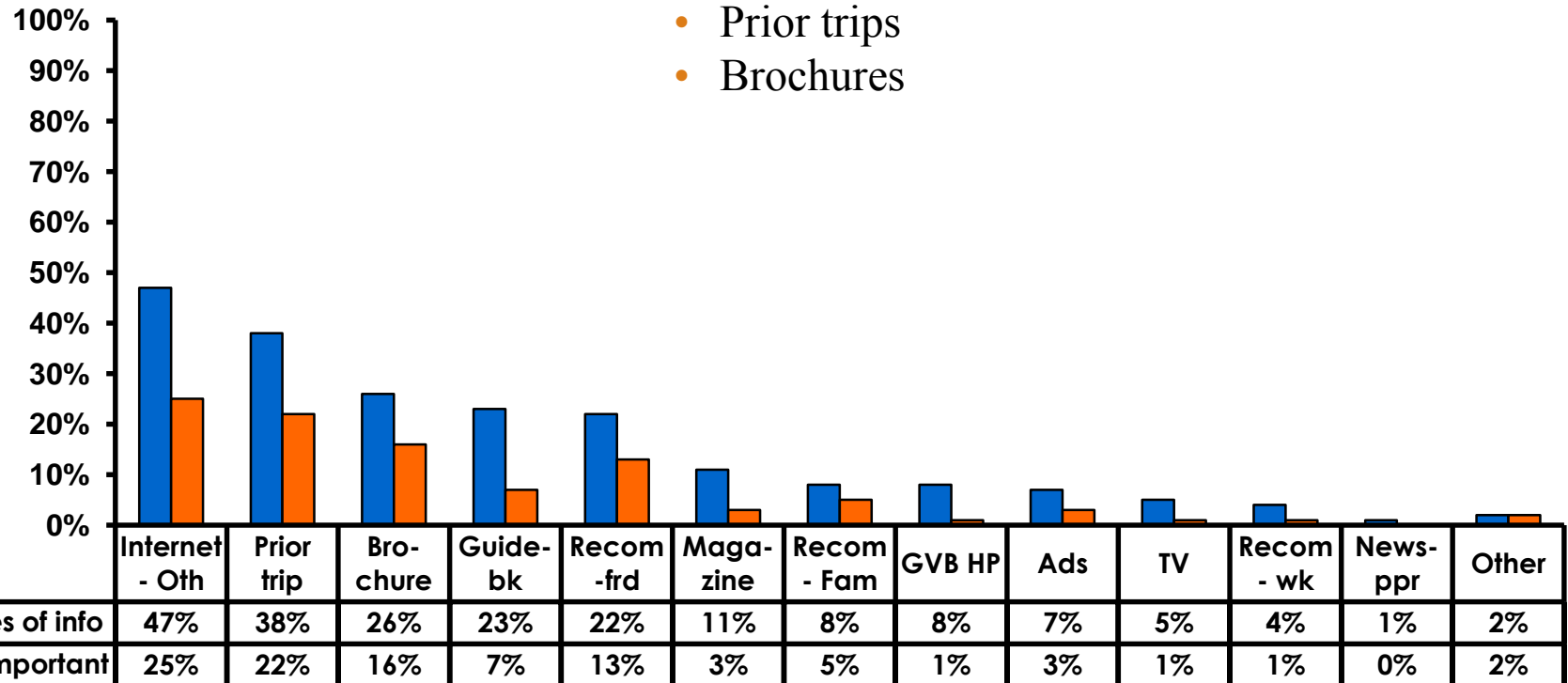
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

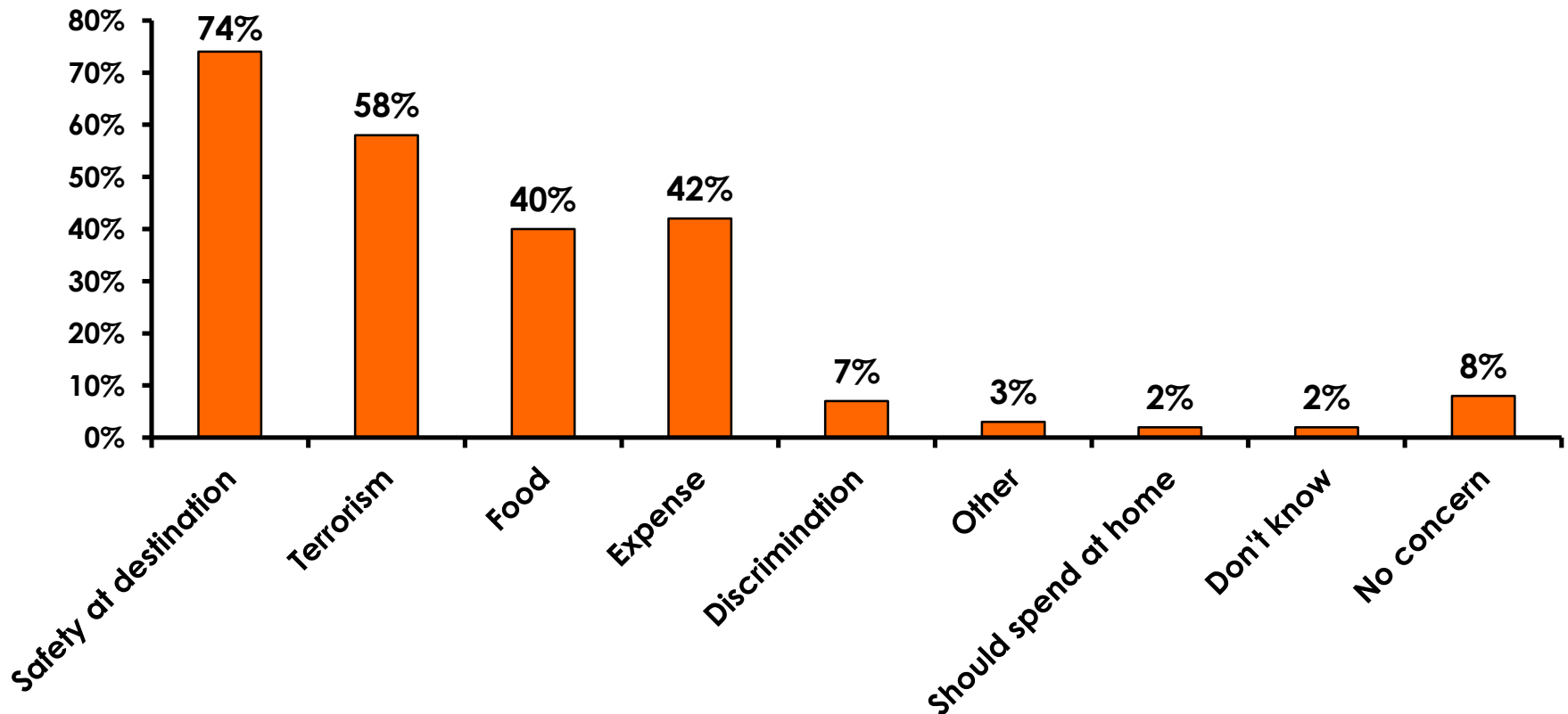
The primary motivational sources of information were.

- Internet sites
- Prior trips
- Brochures



SECTION 6 **OTHER ISSUES**

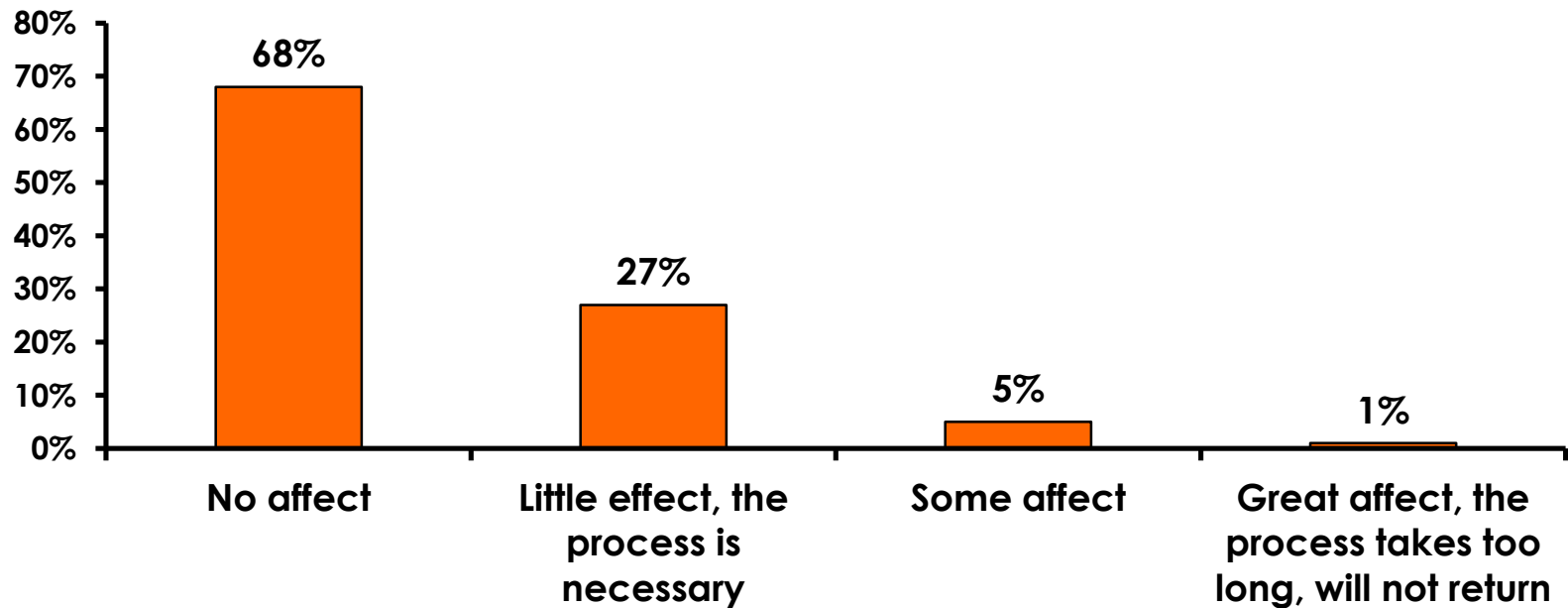
Concerns about travel outside of Japan - Overall



Concerns about travel outside of Japan - By Age & Income

		TOTAL	AGE				Q26								
		-	18-24	25-34	35-49	50+	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q21	Safety	74%	66%	74%	78%	71%	63%	75%	80%	62%	75%	84%	65%	89%	
	Terrorism	58%	54%	57%	58%	64%	56%	67%	72%	55%	56%	56%	38%	67%	
	Expense	42%	61%	38%	40%	33%	31%	47%	61%	26%	46%	48%	41%	44%	
	Food	40%	46%	38%	42%	36%	31%	36%	50%	32%	52%	38%	41%	56%	
	No concerns	8%	16%	8%	5%	5%	13%	14%	7%	11%	8%	2%	11%	11%	
	Discrimination against Japanese	7%	7%	9%	6%	5%		3%	20%	4%	6%	4%	3%	22%	
	Other	3%		5%	2%	5%			4%	4%	3%		8%	11%	
	Should spend at home	2%		3%	2%	2%		6%	4%		2%	6%			
	Don't know	2%	4%	2%	1%				2%	4%					
	Total	Count	346	56	148	99	42	16	36	46	53	63	50	37	9

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

