

GUAM VISITORS BUREAU Japan Visitor Tracker Exit Profile FY2015 OCTOBER 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 **350** 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 **350** 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

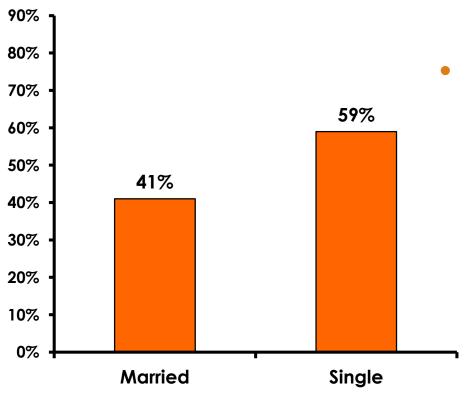
- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction,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



SECTION 1 PROFILE OF RESPONDENTS



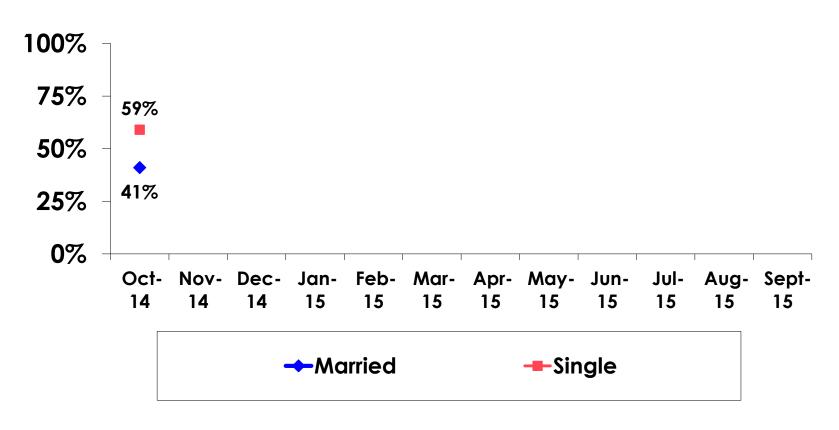
Marital Status - Overall



• 46% of repeat visitors are married.

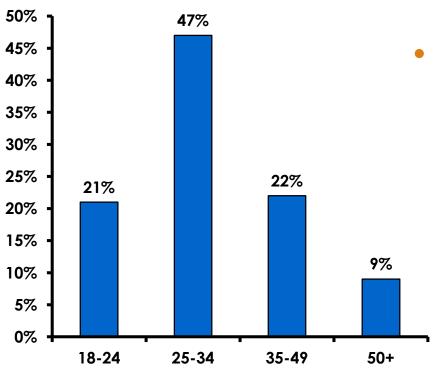


MARITAL STATUS





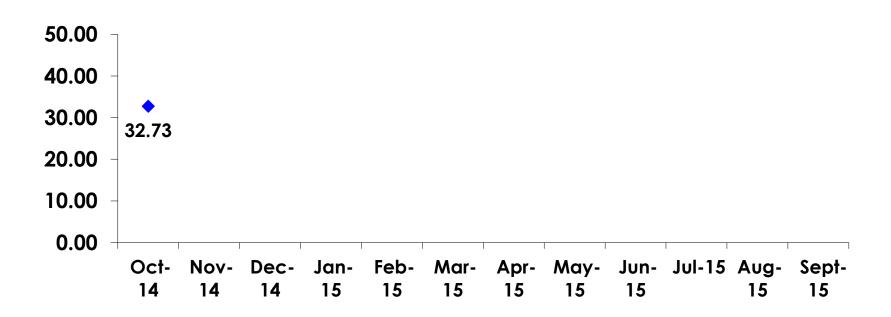
Age - Overall



• The average age of the respondents is 32.73 years of age.

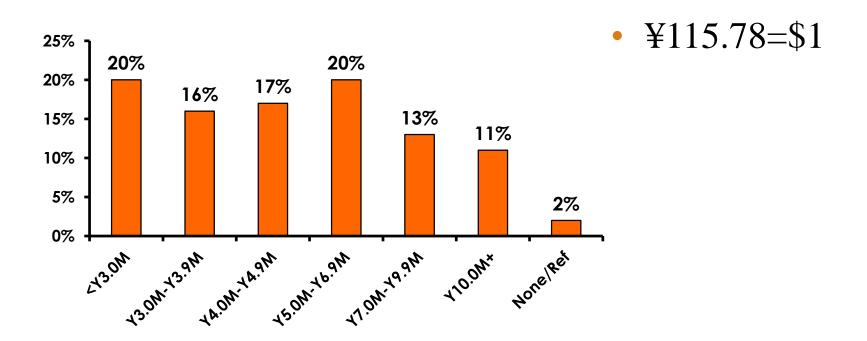


AVERAGE - AGE



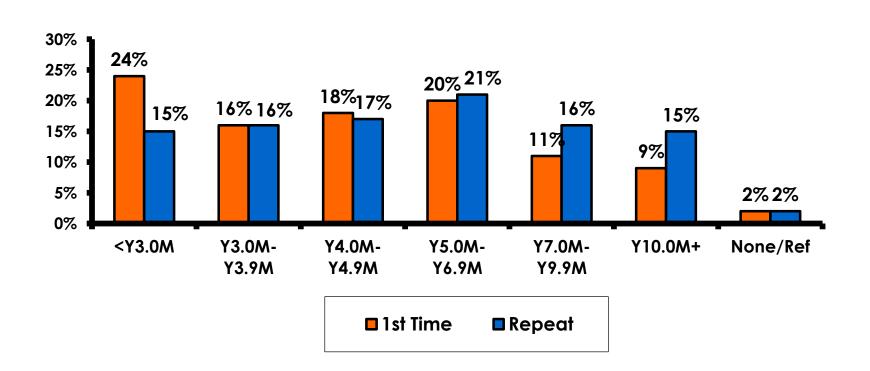


Personal Income





Personal Income – 1st time vs. repeat



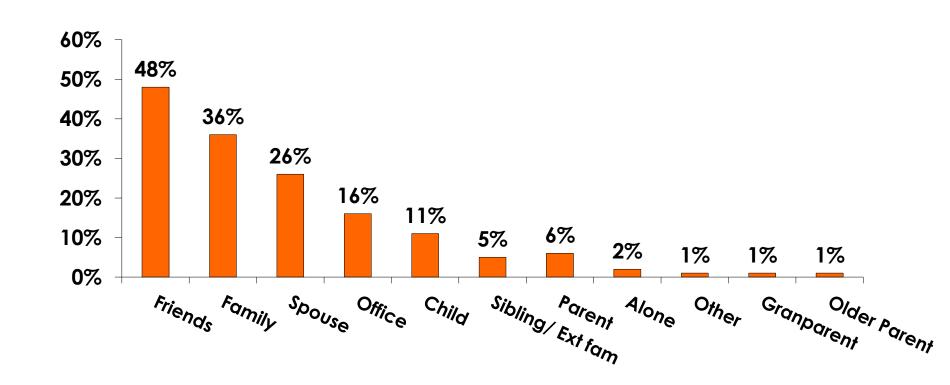


Personal Income by Gender & Age

			TOTAL	GEN	DER		AGE				
			1	Male	Female	18-24	25-34	35-49	50+		
Q26	<y2.0 million<="" td=""><td>Count</td><td>17</td><td>8</td><td>9</td><td>8</td><td>8</td><td></td><td>1</td></y2.0>	Count	17	8	9	8	8		1		
		Column N %	6%	5%	6%	14%	6%		3%		
	Y2.0M-Y3.0M	Count	41	17	24	10	19	7	5		
		Column N %	14%	11%	17%	18%	14%	10%	17%		
	Y3.0M-Y4.0M	Count	47	22	25	5	26	16			
		Column N %	16%	14%	18%	9%	19%	24%			
	Y4.0M-Y5.0M	Count	51	37	14	4	31	10	6		
		Column N %	17%	24%	10%	7%	22%	15%	20%		
	Y5.0M-Y7.0M	Count	60	30	30	11	29	14	6		
		Column N %	20%	19%	21%	20%	21%	21%	20%		
	Y7.0M-Y10.0M	Count	39	20	19	8	13	10	8		
		Column N %	13%	13%	14%	14%	9%	15%	27%		
	Y10.0M+	Count	33	17	16	7	11	11	4		
		Column N %	11%	11%	11%	13%	8%	16%	13%		
	No Income	Count	6	3	3	3	3				
		Column N %	2%	2%	2%	5%	2%				
	Total	Count	294	154	140	56	140	68	30		



Travel Companions

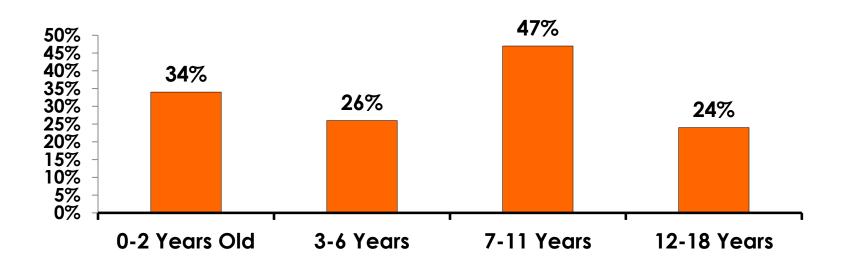




Number of Children Travel Party

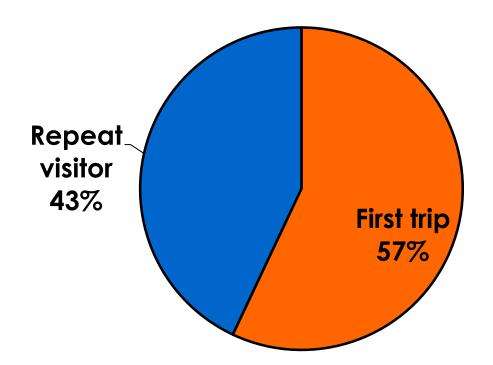
N=38 total respondents traveling with children.

(Of those N=38 respondents, there is a total of 56 children 18 years or younger)



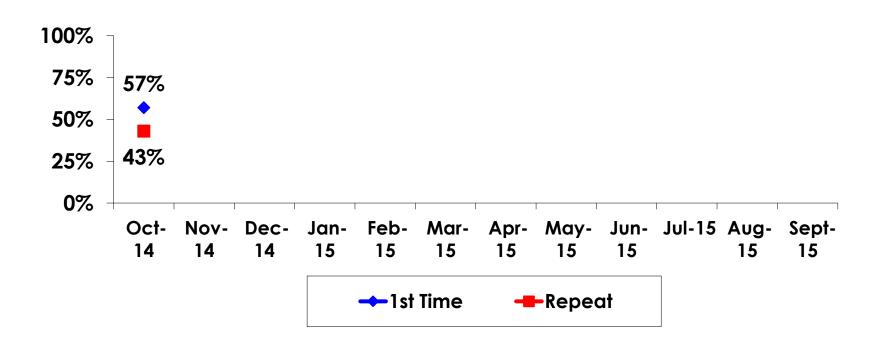


Prior Trips to Guam





PRIOR TRIPS TO GUAM





Trips to Guam by Age & Gender

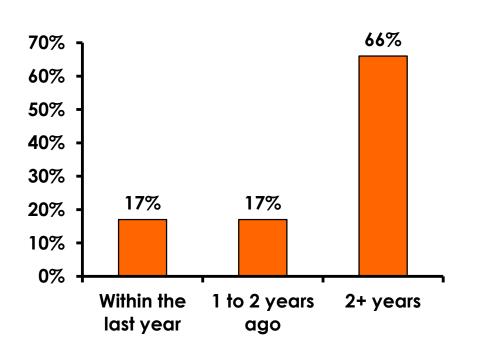
			TOTAL	TRIPS T	O GUAM
			1	1st	Repeat
GENDER	Male	Count	174	96	78
		Column N %	50%	48%	52%
	Female	Count	176	103	73
		Column N %	50%	52%	48%
	Total	Count	350	199	151
AGE	18-24	Count	75	53	22
		Column N %	21%	27%	15%
	25-34	Count	165	96	69
		Column N %	47%	48%	46%
	35-49	Count	77	36	41
		Column N %	22%	18%	27%
	50+	Count	33	14	19
		Column N %	9%	7%	13%
	Total	Count	350	199	151

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



Repeat Visitors Last Trip

n = 141

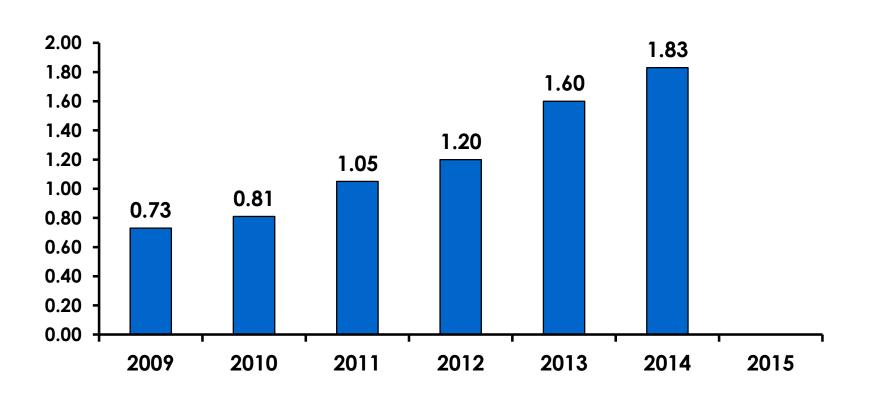


- The average repeat visitor has been to Guam 2.84 times.
- A third of repeat visitors have been to Guam within the last 2 years.



Average Number Overnight Trips

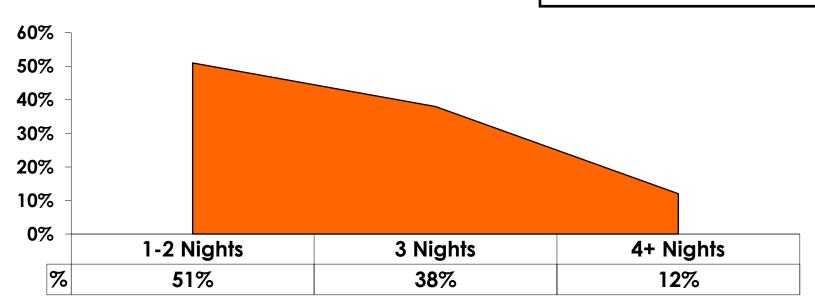
(2009-2015) (2 nights or more)





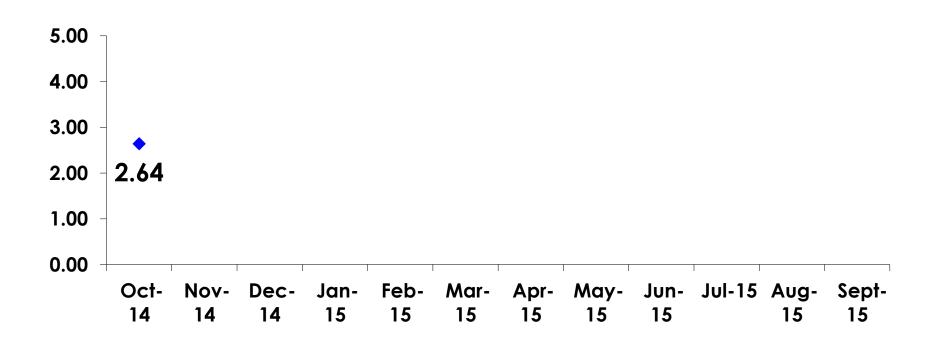
Length of Stay

Mean = 2.64 Days Median = 2.0 Days





AVG LENGTH OF STAY





Occupation by Income

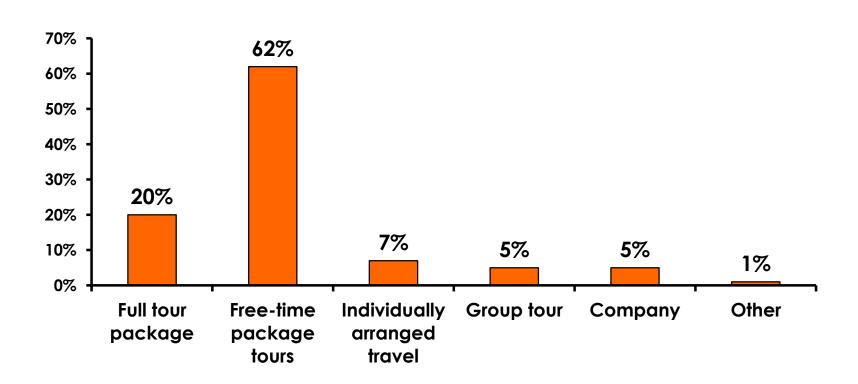
			TOTAL	Q26							
			-	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q25	Office worker non-mgr		21%	12%	37%	28%	14%	20%	18%	9%	17%
	Engineer		18%	12%	20%	34%	24%	13%	13%	6%	17%
	Salesperson		13%		5%	13%	20%	23%	5%	21%	
	Student		12%	47%	5%	2%	2%	10%	10%	15%	50%
	Self-employed		7%	6%	12%	9%	10%	5%	5%	9%	
	Skilled worker		6%		10%		12%	7%	10%	3%	
	Homemaker		5%	6%			4%	8%	13%	3%	
	Professional/ Specialist		4%		5%	4%	2%		3%	18%	
	Freeter		3%	12%			4%	7%			
	Govt- office worker non- mgr		2%		5%	4%	4%		5%		
	Manager		2%				2%	5%	3%	6%	
	Other		2%	6%		2%		2%	8%		
	Teacher		1%		2%		4%		3%	3%	
	Unemployed		1%						3%		17%
	Executive (30+ employees)		1%			2%				3%	
	Free-lancer		0%							3%	
	Govt- Executive		0%						3%		
	Govt- Manager		0%			2%					
	Total	Count	334	17	41	47	51	60	39	33	6



SECTION 2 TRAVEL PLANNING



Travel Planning - Overall





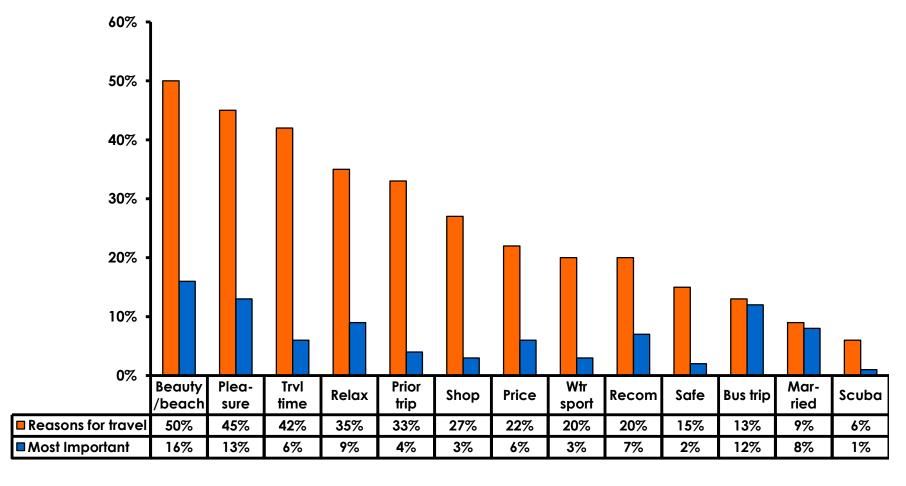
Accommodation by Income

Average length of stay: 2.64 days

			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
Q9	Guam Plaza Hotel		22%	29%	27%	19%	14%	22%	18%	18%	17%
	Grand Plaza Hotel		10%	12%	5%	6%	12%	8%	8%	6%	17%
	PIC Club		9%	29%		9%	4%	15%	8%	6%	
	Fiesta Resort Guam		6%		12%	11%	6%	8%	5%	3%	
	Guam Reef & Olive Spa		6%			13%	8%	2%	3%	15%	
	Outrigger Guam Resort		6%	12%	10%	2%	8%	3%	8%	12%	
	Holiday Resort Guam		5%	12%	15%	2%	4%	3%	8%		17%
	Hilton Guam Resort		5%			2%	8%	12%	5%	9%	
	Royal Orchid Guam		5%	6%	5%	6%	4%	3%	10%	3%	17%
	Westin Resort Guam		5%		5%	6%	2%	5%	5%	9%	
	Onward Beach Resort		3%		2%		2%	3%	13%	3%	
	Pacific Bay Hotel		3%			11%	2%	3%	3%		17%
	Leo Palace Resort		3%		7%		2%	2%		9%	
	Hotel Nikko Guam		2%		2%	2%	8%		3%		
	Hyatt Regency Guam		2%		2%	4%	4%		3%	3%	
	Lotte Hotel Guam		1%				2%	3%			17%
	Hotel Santa Fe		1%				4%	2%			
	Sheraton Laguna Guam		1%		2%		4%				
	Oceanview Hotel		1%			2%				3%	
	Bayview Hotel		1%		2%		2%	2%			
	Pacific Star Resort & Spa		1%			2%		2%			
	Other		1%			2%			3%		
	Condo		1%		2%						
	Days Inn (Maite)		0%				2%				
	Total	Count	348	17	41	47	51	59	39	33	6



Travel Motivation - Top Responses





Most Important Reason for Choosing Guam

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



Motivation by Age & Gender

			TOTAL		AG	E		GENDER		
			-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty		50%	59%	53%	43%	34%	48%	52%	
	Pleasure		45%	55%	47%	40%	25%	39%	52%	
	Short travel time		42%	36%	43%	49%	28%	42%	41%	
	Relax		35%	36%	42%	25%	16%	32%	37%	
	Previous trip		33%	21%	33%	36%	47%	36%	29%	
	Shopping		27%	31%	27%	21%	28%	20%	34%	
	Price		22%	40%	16%	17%	19%	19%	24%	
	Water sports		20%	17%	24%	18%	16%	21%	20%	
	Recomm- friend/family/trvl agnt		20%	31%	18%	14%	19%	20%	20%	
	Safe		15%	11%	15%	25%	9%	19%	12%	
	Company/ Business Trip		13%	7%	13%	18%	22%	14%	13%	
	Married/ Attn wedding		9%	1%	10%	9%	19%	12%	6%	
	Scuba		6%	9%	6%	4%	3%	5%	7%	
	Honeymoon		4%	1%	7%	4%		8%	1%	
	Other		3%	4%	2%	4%		2%	4%	
	Company Sponsored		3%		2%	5%	3%	1%	4%	
	Golf		2%	1%	2%	3%	3%	3%	1%	
	Visit friends/ Relatives		2%	3%	2%		3%	2%	2%	
	Organized sports		0%		1%			1%		
	Career Cert/ Testing		0%	1%					1%	
	Total	Count	349	75	165	77	32	173	176	



Motivation 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
Q5A	Natural beauty		50%	35%	46%	40%	55%	58%	56%	48%	83%
	Pleasure		45%	41%	34%	38%	33%	58%	59%	36%	67%
	Short travel time		42%	12%	34%	34%	43%	58%	56%	39%	33%
	Relax		35%	35%	22%	34%	31%	40%	41%	39%	17%
	Previous trip		33%	24%	24%	34%	39%	38%	33%	42%	33%
	Shopping		27%	24%	29%	26%	22%	35%	23%	18%	50%
	Price		22%	18%	22%	17%	16%	32%	18%	24%	33%
	Water sports		20%	12%	22%	30%	27%	27%	18%	21%	
	Recomm- friend/family/trvl agnt		20%	47%	20%	17%	10%	22%	15%	15%	50%
	Safe		15%	6%	15%	11%	16%	23%	21%	15%	
	Company/ Business Trip		13%	6%	24%	17%	18%	7%	10%	12%	
	Married/ Attn wedding		9%		10%	17%	12%	8%	3%	12%	
	Scuba		6%	6%	5%	9%	8%	3%	8%	9%	33%
	Honeymoon		4%	6%	5%	4%	14%	2%	5%		
	Other		3%		2%	2%	2%	5%		3%	
	Company Sponsored		3%		2%		2%	2%	5%	9%	
	Golf		2%				6%	2%	3%	6%	17%
	Visit friends/ Relatives		2%					3%	3%	3%	
	Organized sports		0%				2%				
	Career Cert/ Testing		0%					2%			
	Total	Count	349	17	41	47	51	60	39	33	6



SECTION 3 EXPENDITURES

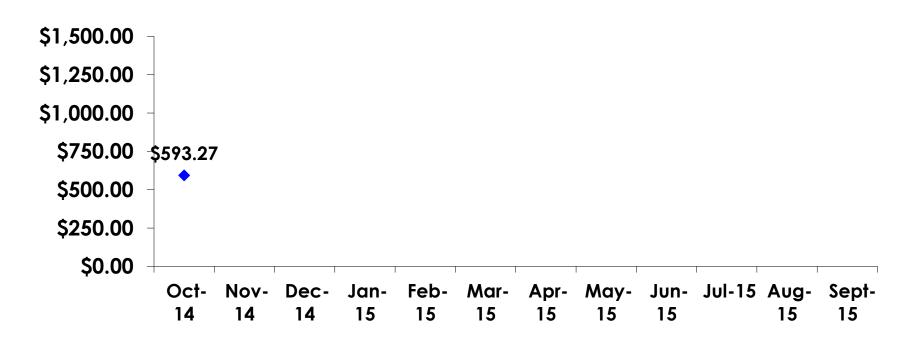


Prepaid Expenditures ¥115.78/US\$1

- \$935.02 = overall mean average prepaid expense (for entire travel party size) by respondent
- $\$0 = \min \text{minimum}$ (lowest amount recorded for the entire sample)
- \$4,189 = maximum (highest amount recorded for the entire sample)
- \$593.27 = overall mean average <u>per person</u> prepaid expenditures



PREPAID EXPENDITURES Per Person



YTD=\$593.27



Breakdown of Prepaid Expenditures ¥115.78=\$1

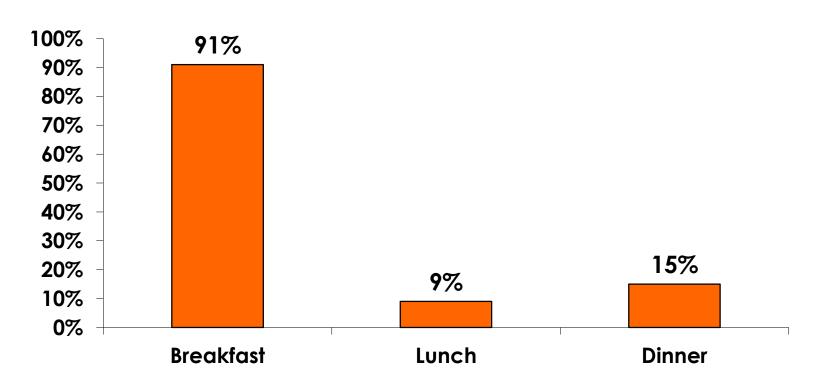
(Filter: Only those who responded/ Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$999.69
Air & Accommodation w/ daily meal package	\$1,704.79
Air only	\$870.62
Accommodation only	\$183.85
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation – Japan	\$69.93
Ground transportation – Guam	\$50.38
Optional tours/ activities	\$200.45
Other expenses	\$270.23
Total Prepaid	\$935.02



PREPAID MEAL BREAKDOWN

Air/Accommodations with Daily Meal Pkg. n=33



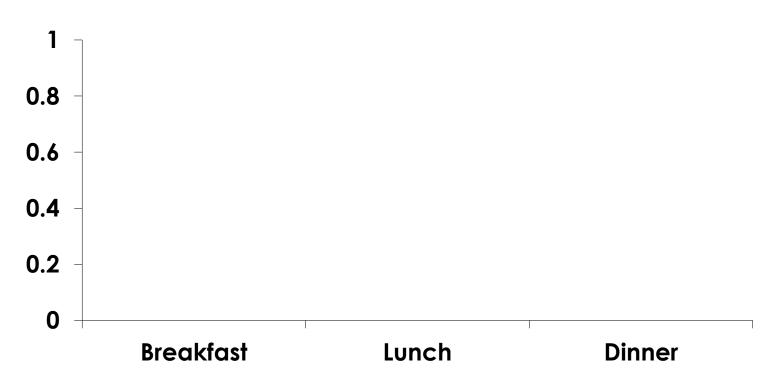
Mean=\$1,704.79 per travel party



PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

$$N=0$$

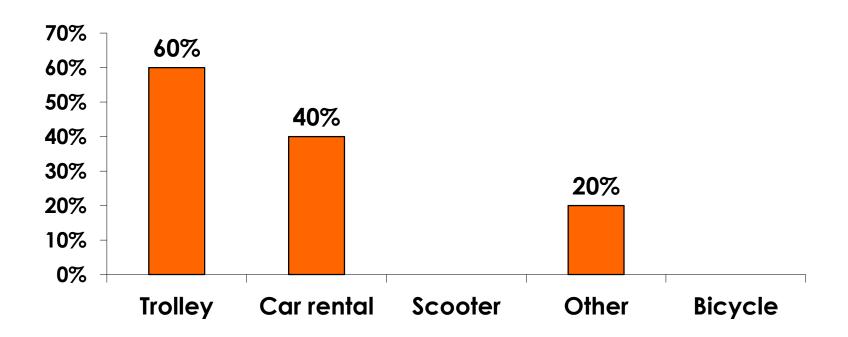


Mean=\$xx per travel party



PREPAID GROUND TRANSPORTATION

n=5



Mean=\$50.38 per travel party

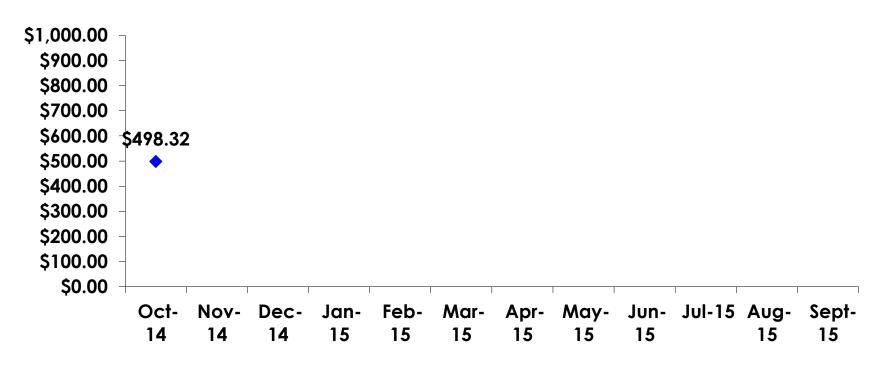


On-Island Expenditures

- \$700.80 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,200 = Maximum (highest amount recorded for the entire sample)
- \$498.32 = overall mean average <u>per person</u> onisland expenditure



ON-ISLAND EXPENDITURES Per Person

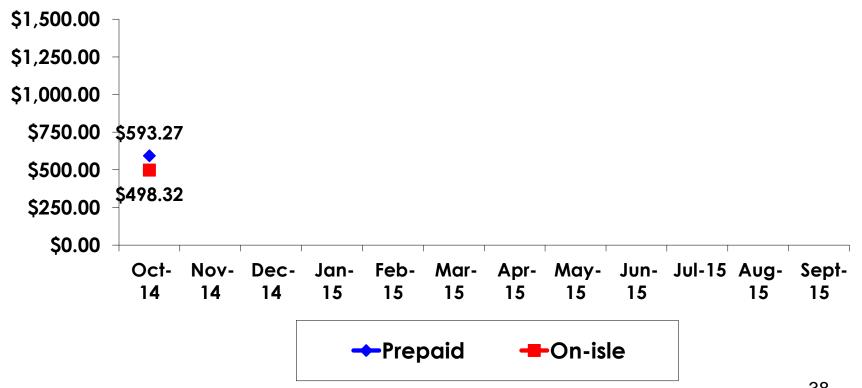


YTD = \$498.32



PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$593.27 On-Isle YTD = \$498.32





Total On-Island Expenditure by Gender & Age

TOTAL			GEN	GENDER GENDER								
						Ma	ile		Female			
					AGE				AGE			
		-	Male	Female	18-24 25-34 35-49 50+				18-24	25-34	35-49	50+
PER PERSON	Mean	\$498.32	\$483.73	\$512.74	\$522.24	\$448.31	\$516.61	\$495.66	\$504.98	\$502.75	\$552.59	\$524.25
	Median	\$400	\$400	\$400	\$400	\$400	\$417	\$300	\$480	\$400	\$333	\$425
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,100	\$3,100	\$3,000	\$2,000	\$1,600	\$3,100	\$2,000	\$2,000	\$3,000	\$3,000	\$2,000



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	\$27.81	\$45.18	\$10.64	\$13.89	\$23.67	\$44.82	\$40.45
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$26.20	\$28.67	\$23.77	\$15.09	\$24.76	\$40.36	\$25.61
	Median	\$0	\$ 5	\$0	\$0	\$0	\$10	\$0
F&B RESTRNT	Mean	\$79.78	\$106.16	\$53.70	\$45.56	\$82.95	\$103.70	\$85.91
	Median	\$9	\$50	\$0	\$0	\$0	\$50	\$0
OPT TOUR	Mean	\$73.60	\$97.09	\$50.38	\$58.77	\$78.44	\$85.91	\$54.36
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$168.99	\$172.90	\$165.13	\$142.40	\$135.59	\$286.17	\$123.03
	Median	\$2	\$0	\$30	\$30	\$0	\$100	\$0
GIFT- OTHER	Mean	\$101.53	\$96.69	\$106.31	\$84.25	\$88.96	\$132.73	\$130.82
	Median	\$50	\$50	\$39	\$50	\$10	\$100	\$50
TRANS	Mean	\$11.25	\$13.69	\$8.85	\$10.61	\$9.04	\$16.39	\$11.79
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$211.92	\$244.42	\$179.79	\$154.16	\$209.93	\$237.69	\$293.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$700.80	\$805.72	\$597.07	\$527.28	\$653.59	\$943.09	\$765.88
	Median	\$500	\$600	\$480	\$482	\$500	\$700	\$500



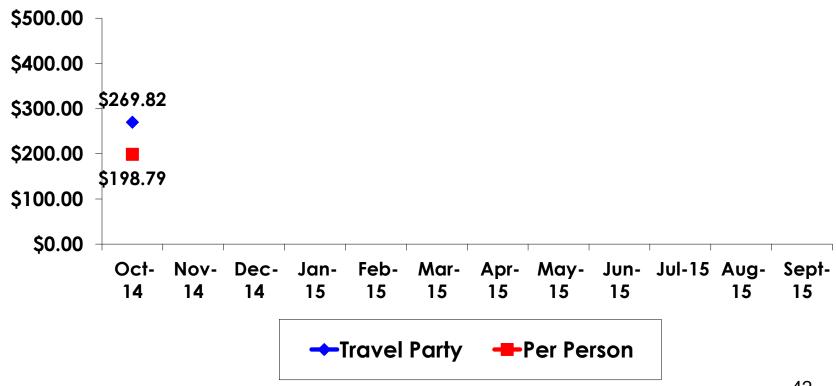
On-Island Expenditures First Timers & Repeaters

		TOTAL	TRIPS T	O GUAM
		1	1st	Repeat
F&B HOTEL	Mean	\$27.81	\$28.95	\$26.31
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$26.20	\$23.75	\$29.43
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$79.78	\$69.49	\$93.34
	Median	\$9	\$0	\$20
OPT TOUR	Mean	\$73.60	\$63.20	\$87.31
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$168.99	\$156.47	\$185.50
	Median	\$2	\$0	\$30
GIFT- OTHER	Mean	\$101.53	\$109.83	\$90.58
	Median	\$50	\$50	\$50
TRANS	Mean	\$11.25	\$10.30	\$12.52
	Median	\$0	\$0	\$0
OTHER	Mean	\$211.92	\$186.83	\$244.98
	Median	\$0	\$0	\$0
TOTAL	Mean	\$700.80	\$650.68	\$766.86
	Median	\$500	\$500	\$550



ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$269.82 Per Person YTD = \$198.79





Total Expenditures Per Person (Prepaid & On-Island)

- \$1,091.59 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,864 = Maximum (highest amount recorded for the entire sample)



TOTAL EXPENDITURES Per Person



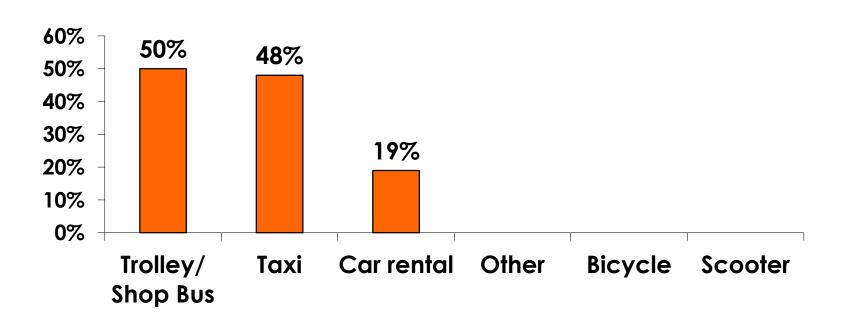


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$27.81
Food & beverage in fast food restaurant/convenience store	\$26.20
Food & beverage at restaurants or drinking establishments outside a hotel	\$79.78
Optional tours and activities	\$73.60
Gifts/souvenirs for yourself/companions	\$168.99
Gifts/ souvenirs for friends/family at home	\$101.53
Local transportation	\$11.25
Other expenses not covered	\$211.92
Average Total	\$700.80



Local Transportation_{n=52}



Mean=\$11.25 per travel party



Guam Airport Expenditures

- \$20.46 = Mean
- \$7 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$400 = Maximum (highest amount recorded for the entire sample)



Breakdown of Airport Expenditures

	MEAN \$
Food & Beverages	\$6.32
Gifts/Souvenirs Self	\$4.80
Gifts/Souvenirs Others	\$9.30
Total	\$20.46



SECTION 4 VISITOR SATISFACTION

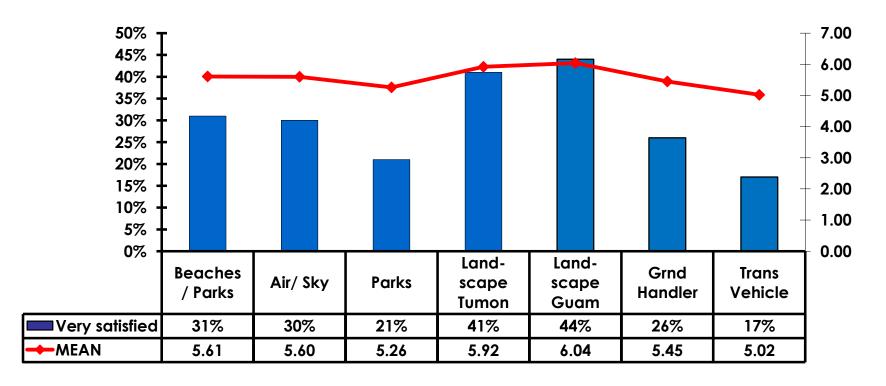


Satisfaction Scores Overall



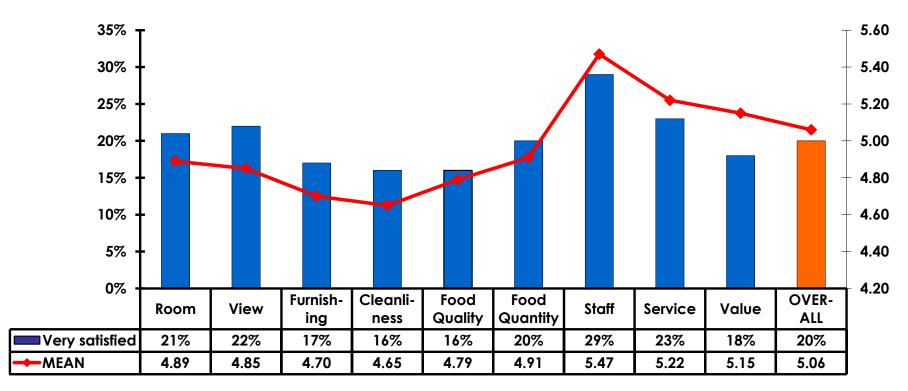


Satisfaction Quality/ Cleanliness



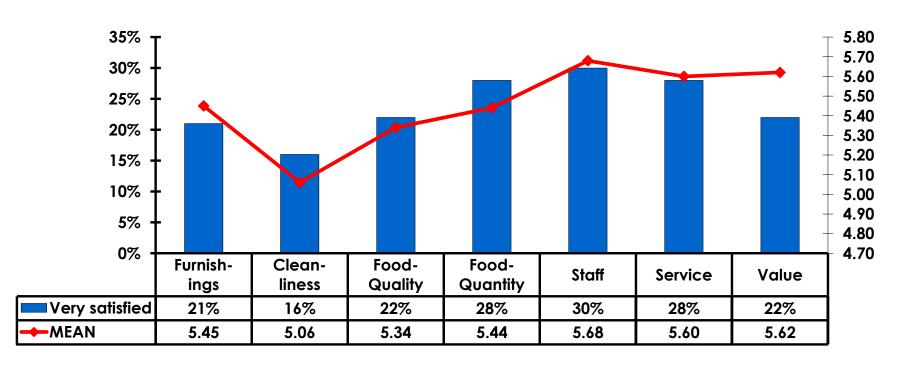


Quality of Accommodations



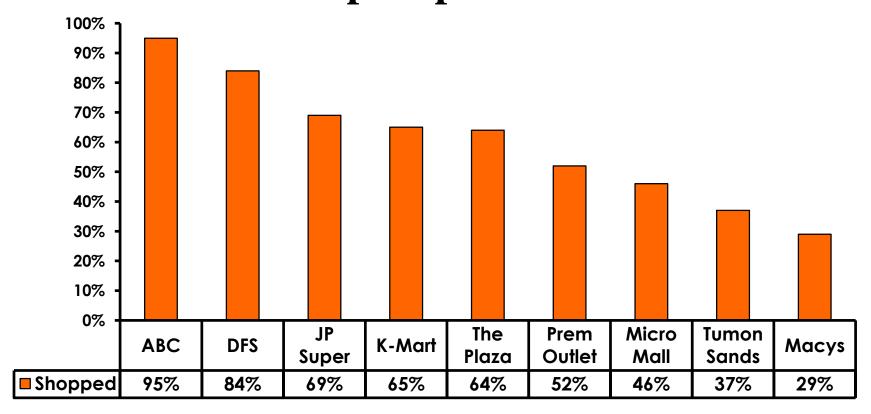


Quality of Dining Experience





Visits to Shopping Centers/Malls on Guam Top responses



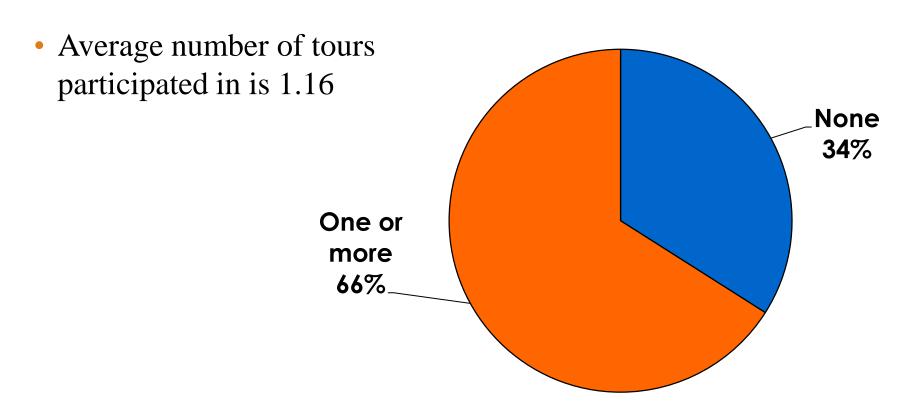


Satisfaction with Shopping

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 55%	Score of 6 to 7 = 53 %
Score of 4 to 5 = 41%	Score of 4 to 5 = 40 %
Score 1 to 3 = 4 %	Score 1 to 3 = 6%
MEAN = 5.45	MEAN = 5.41

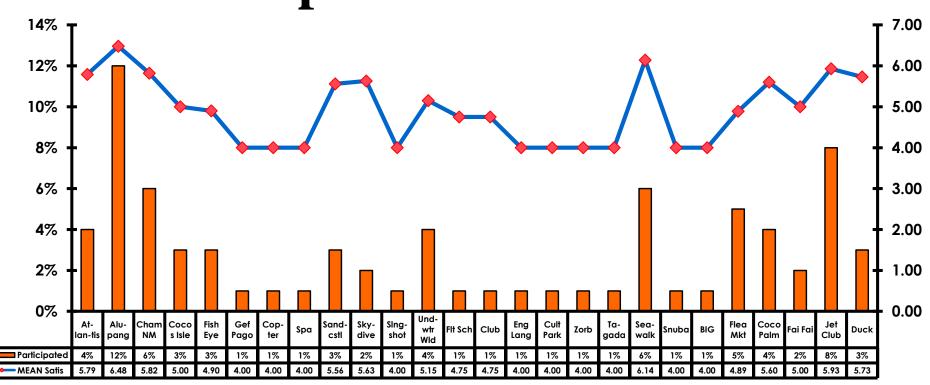


Optional Tour Participation





Optional Tours Participation & Satisfaction





Day Tours Satisfaction

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 61%	Score of 6 to 7 = 58%
Score of 4 to 5 = 36%	Score of 4 to 5 = 40%
Score 1 to 3 = 2 %	Score 1 to 3 = 1%
MEAN = 5.58	MEAN = 5.57

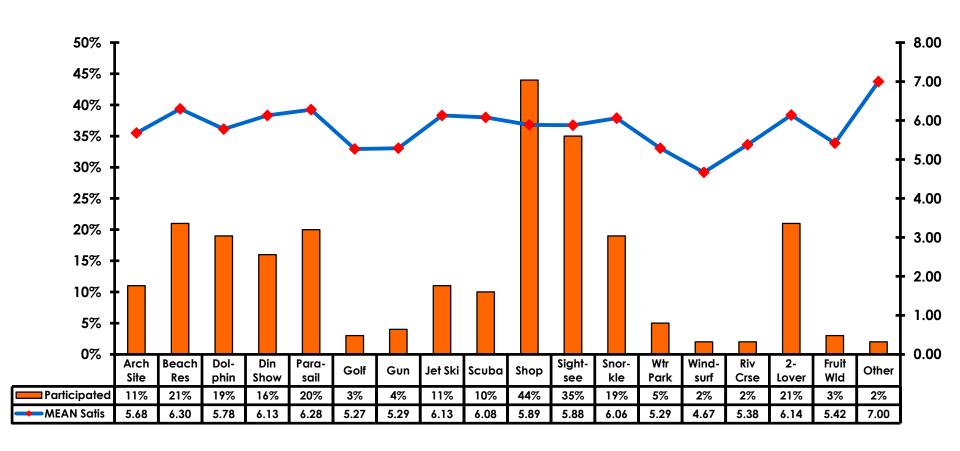


Night Tours Satisfaction

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 31%	Score of 6 to 7 = 27%
Score of 4 to 5 = 66%	Score of 4 to 5 = 71%
Score 1 to 3 = 3 %	Score 1 to 3 = 3 %
MEAN = 4.81	MEAN = 4.75

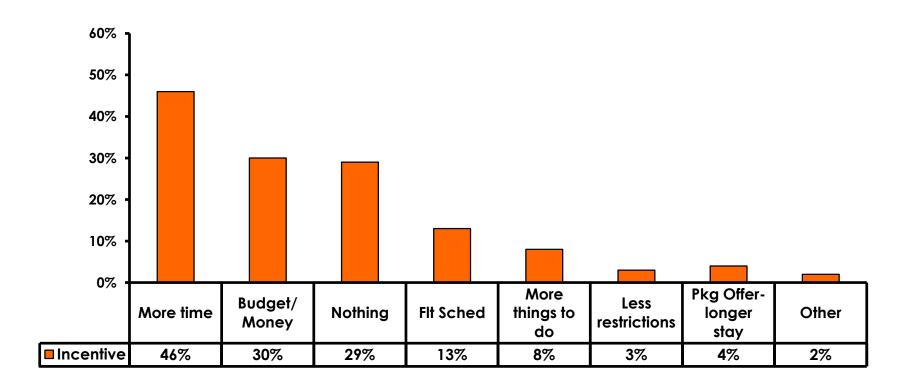


Satisfaction with Other Activities





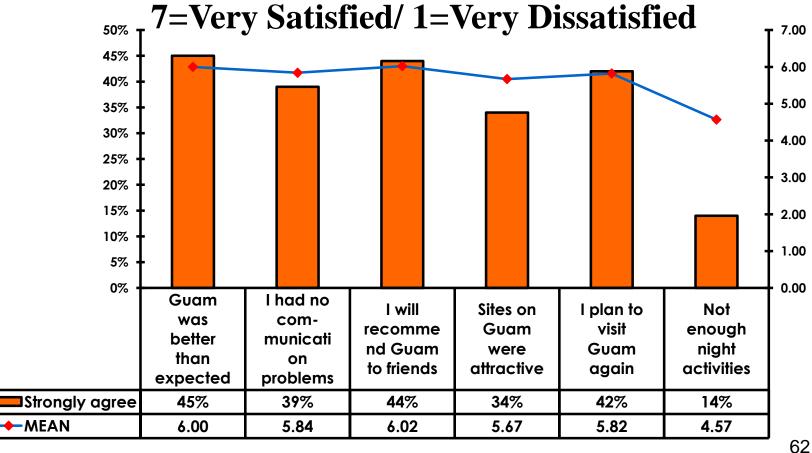
What would it take to make you want to stay an extra day in Guam?





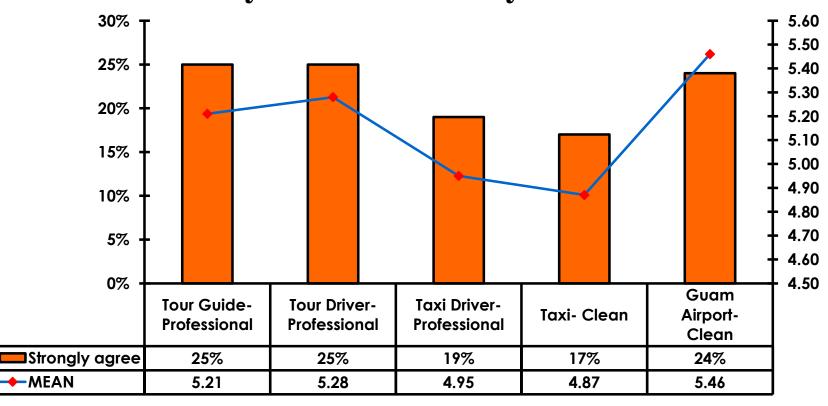
On-Island Perceptions







On-Island Perceptions

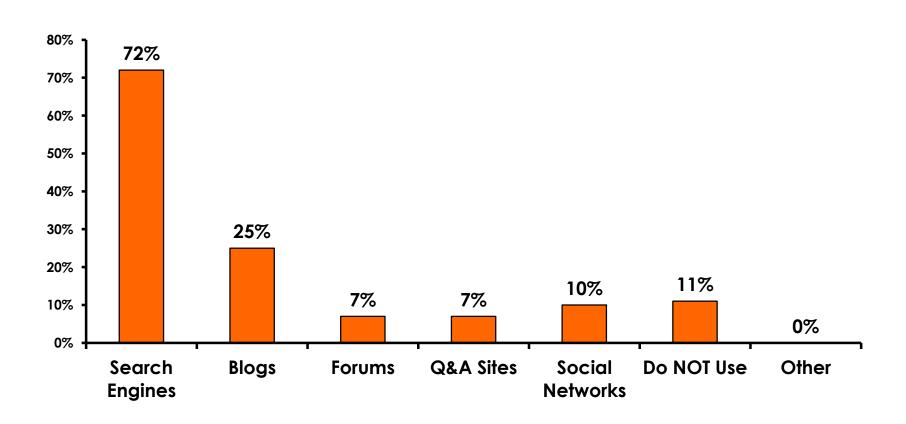




SECTION 5 PROMOTIONS

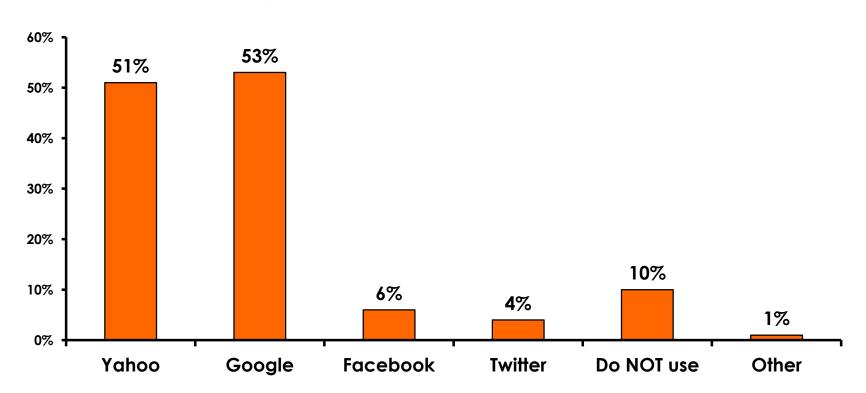


Internet- Guam Sources of Info



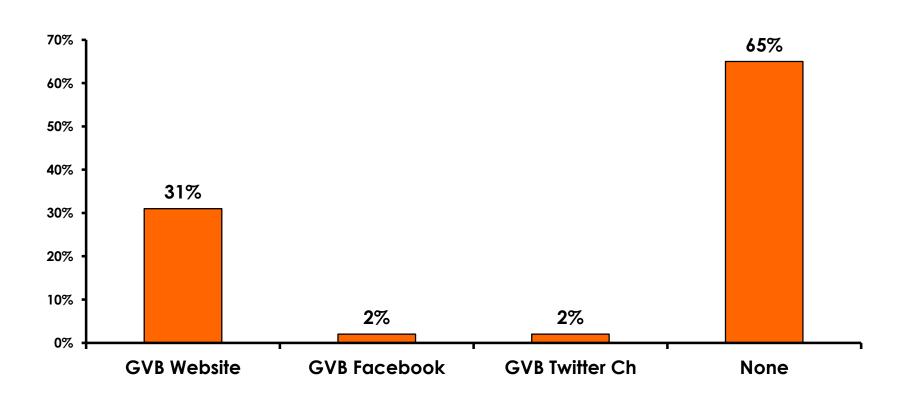


Internet- Things To Do Sources of Info



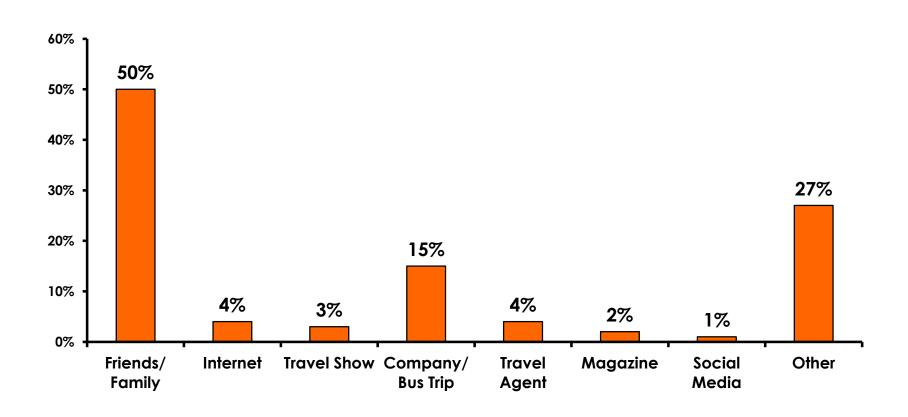


Internet- GVB Sources



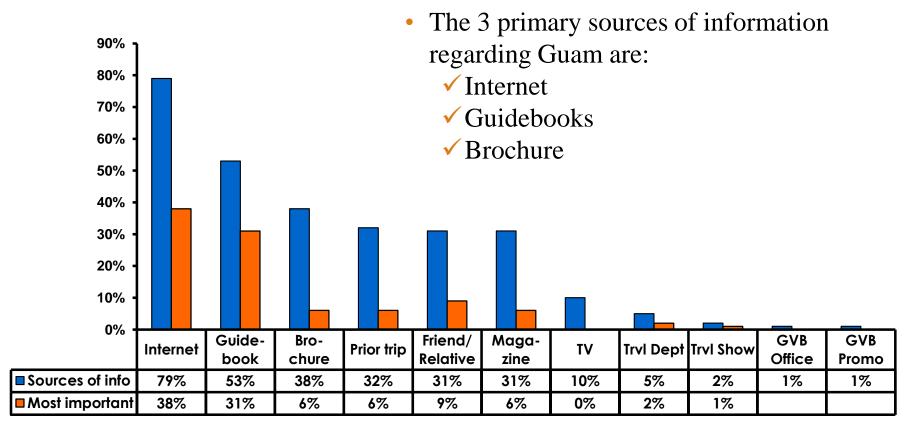


Travel Motivation-Info Sources



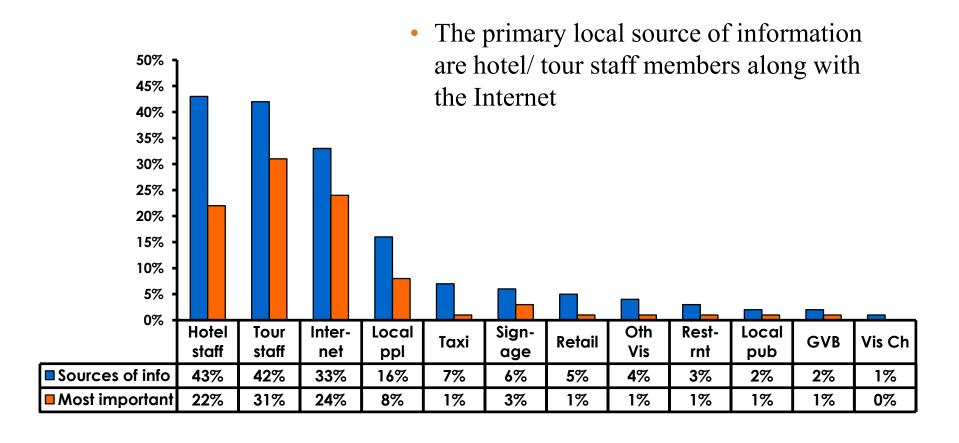


Sources of Information Pre-arrival





Sources of Information Post-arrival

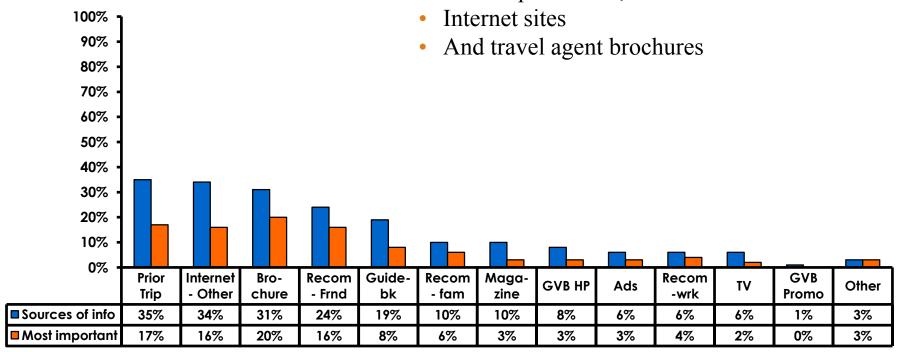




Sources of Information - Motivation

The primary motivational sources of information were.

Prior trip to Guam,

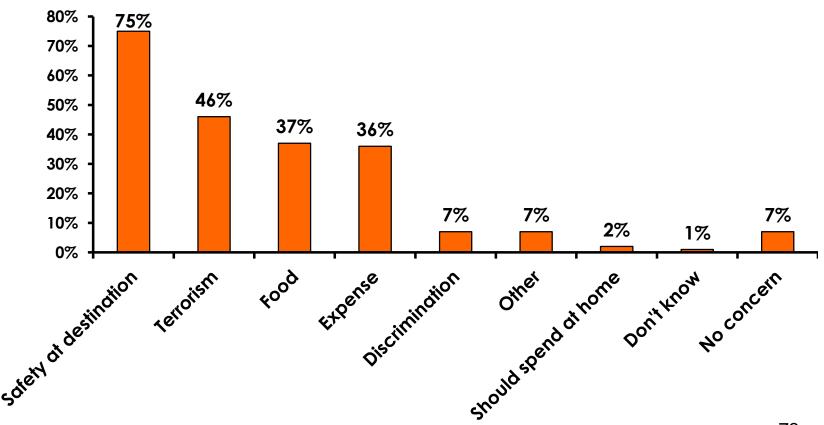




SECTION 6 OTHER ISSUES



Concerns about travel outside of Japan - Overall



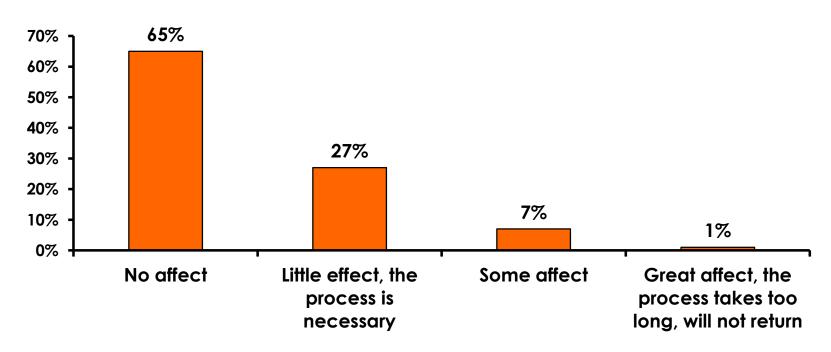


Concerns about travel outside of Japan - By Age & Income

	TOTAL AGE						Q26							
		TOTAL	40.04		I									
		-	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%	78%	70%	76%	85%	71%	68%	66%	78%	83%	79%	76%	100%
	Terrorism	46%	37%	45%	48%	61%	35%	41%	45%	54%	44%	54%	36%	33%
	Food	37%	38%	36%	31%	48%	47%	39%	34%	28%	34%	44%	33%	33%
	Expense	36%	48%	33%	32%	36%	35%	27%	40%	38%	42%	36%	33%	50%
	Other	7%	7%	8%	5%	6%	6%	2%	9%	12%	7%	5%	3%	17%
	Discrimination against Japanese	7%	5%	6%	9%	9%	6%	7%	6%	4%	8%	8%	6%	17%
	No concerns	7%	5%	7%	11%		12%	12%	9%	4%	3%	3%	6%	
	Should spend at home	2%	3%	1%		9%		5%		4%	3%			
	Don't know	1%	4%	1%		3%		2%			2%		3%	
	Total Cour	t 340	73	159	75	33	17	41	47	50	59	39	33	6



Security Screening/Immigration Process at Guam International Airport





Airport Screening

7pt Rating Scale

