



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2014

SEPTEMBER 2014



Prepared by: QMark Research

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Background & Methodology

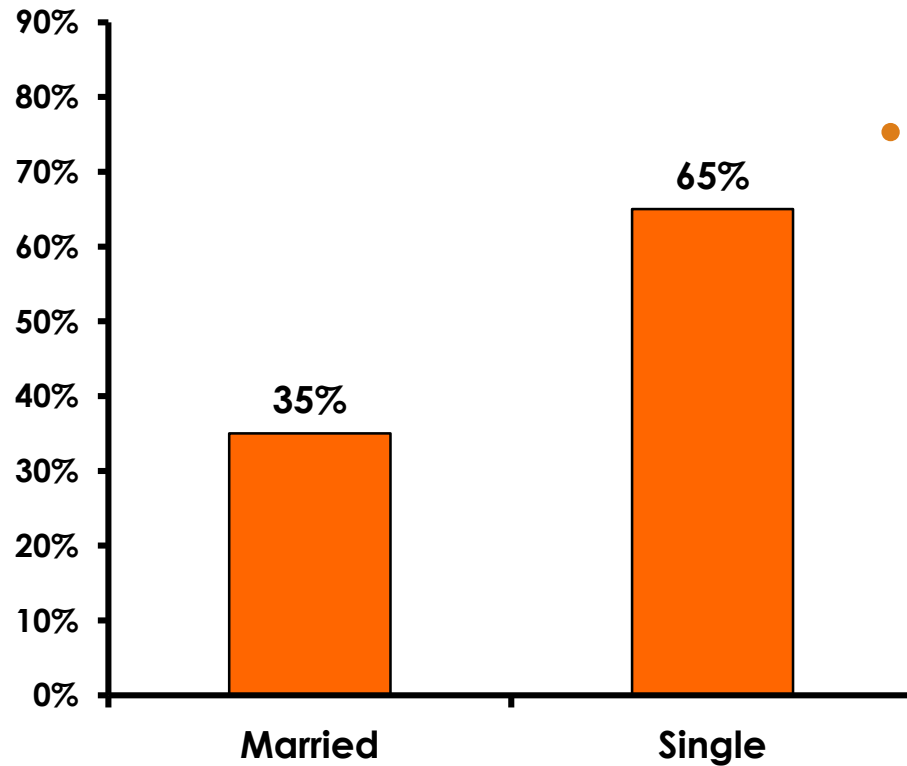
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing 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.

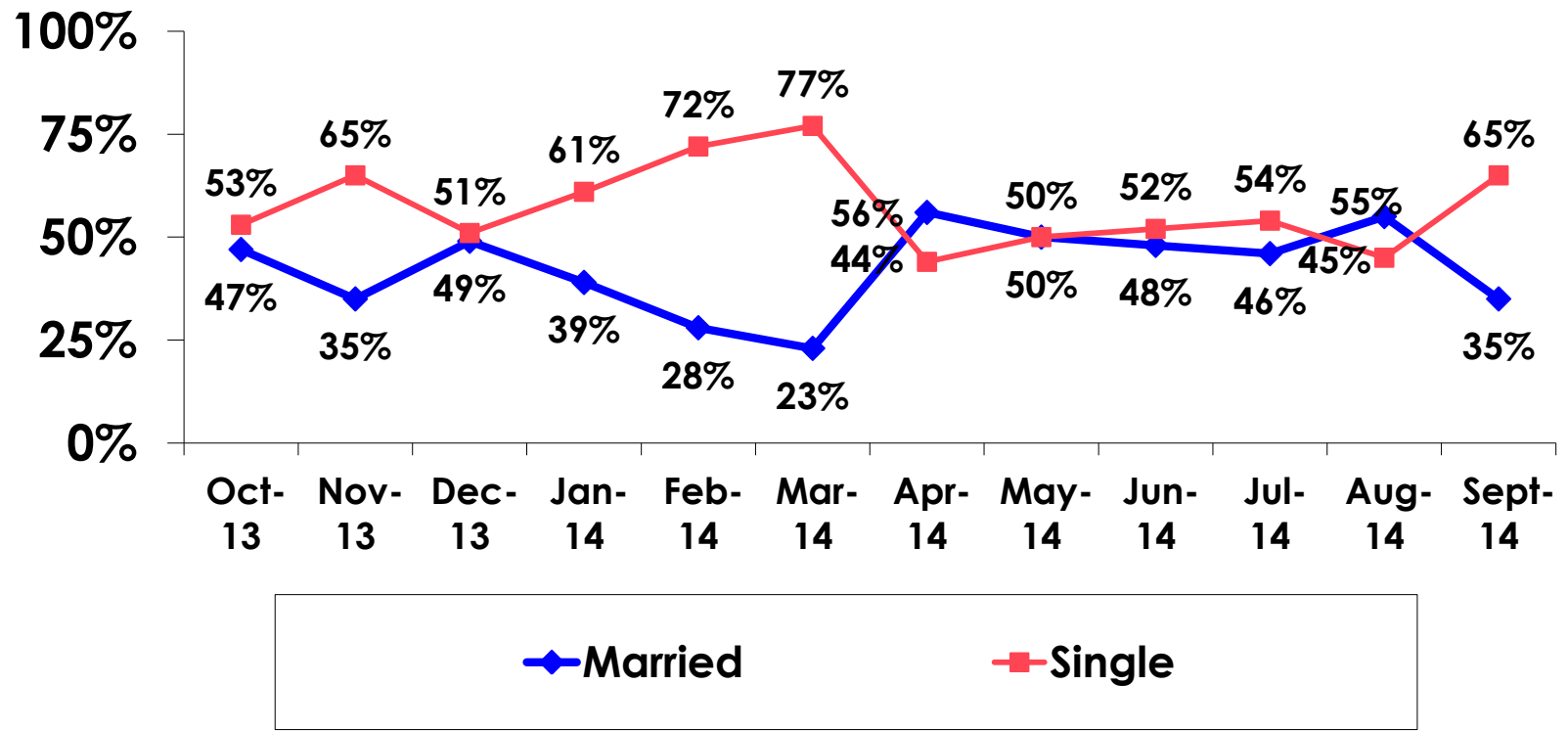
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

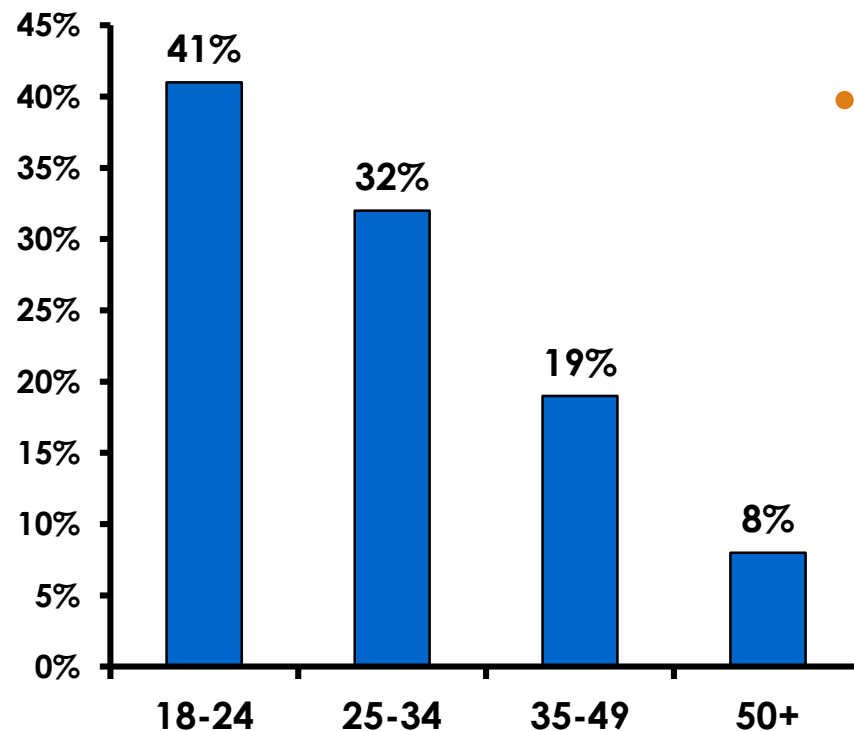


- 70% of first time visitors are single.

MARITAL STATUS

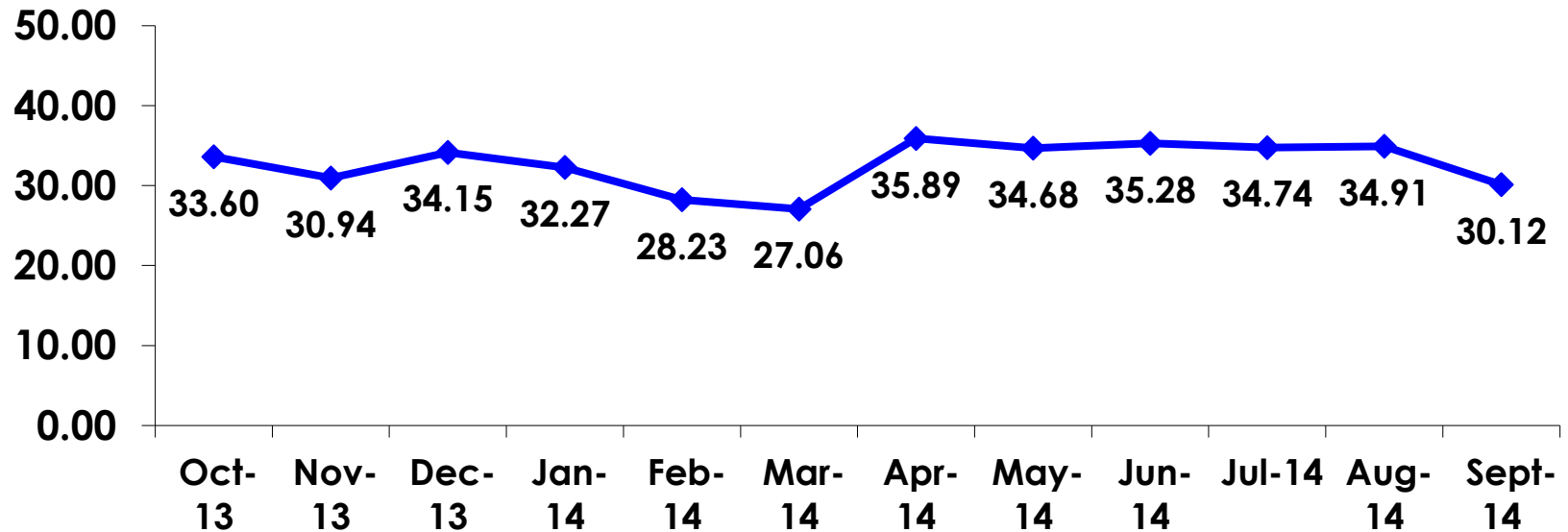


Age - Overall

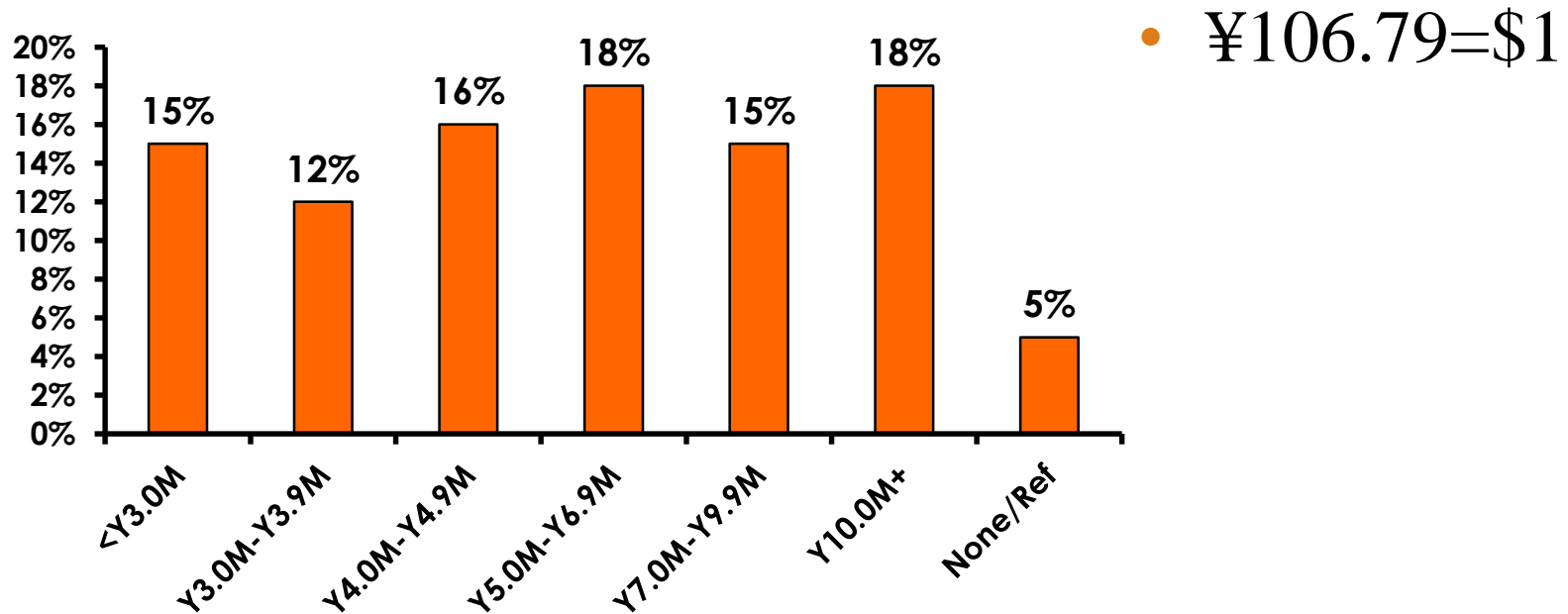


- The average age of the respondents is 30.12 years of age.

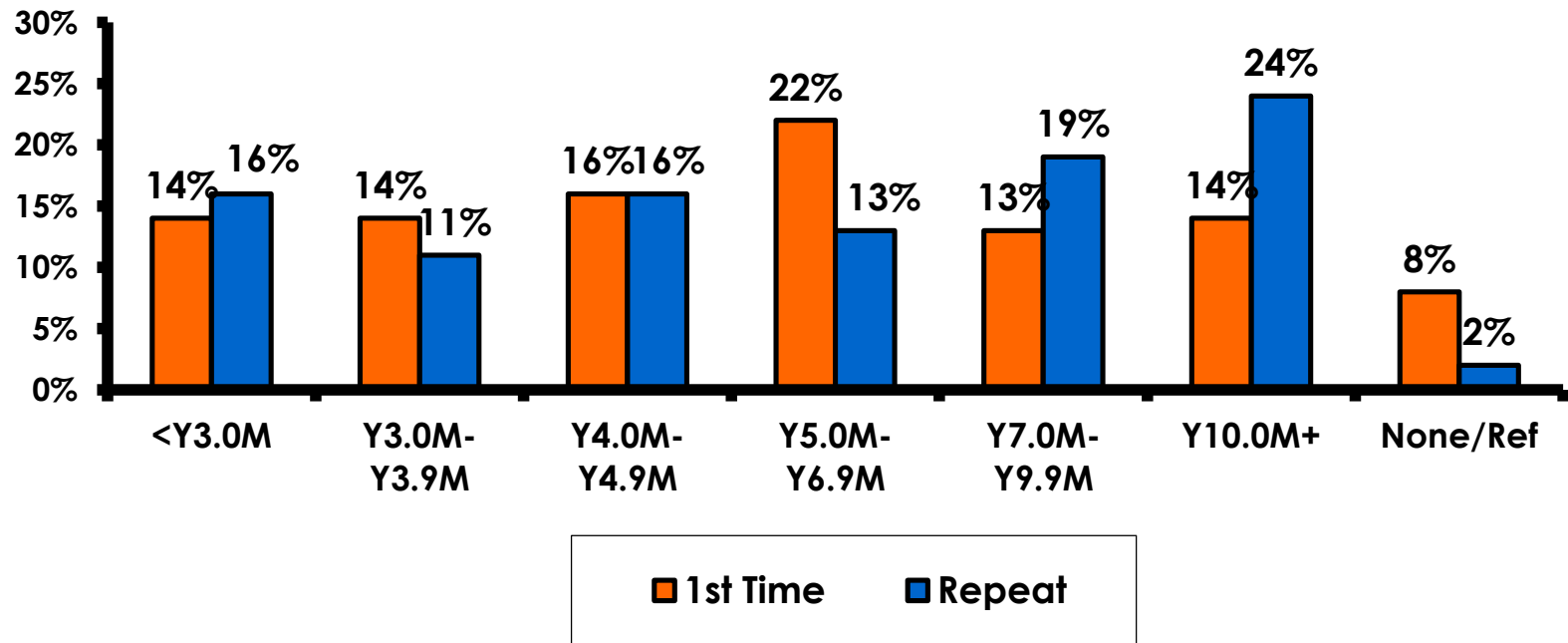
AVERAGE - AGE



Personal Income



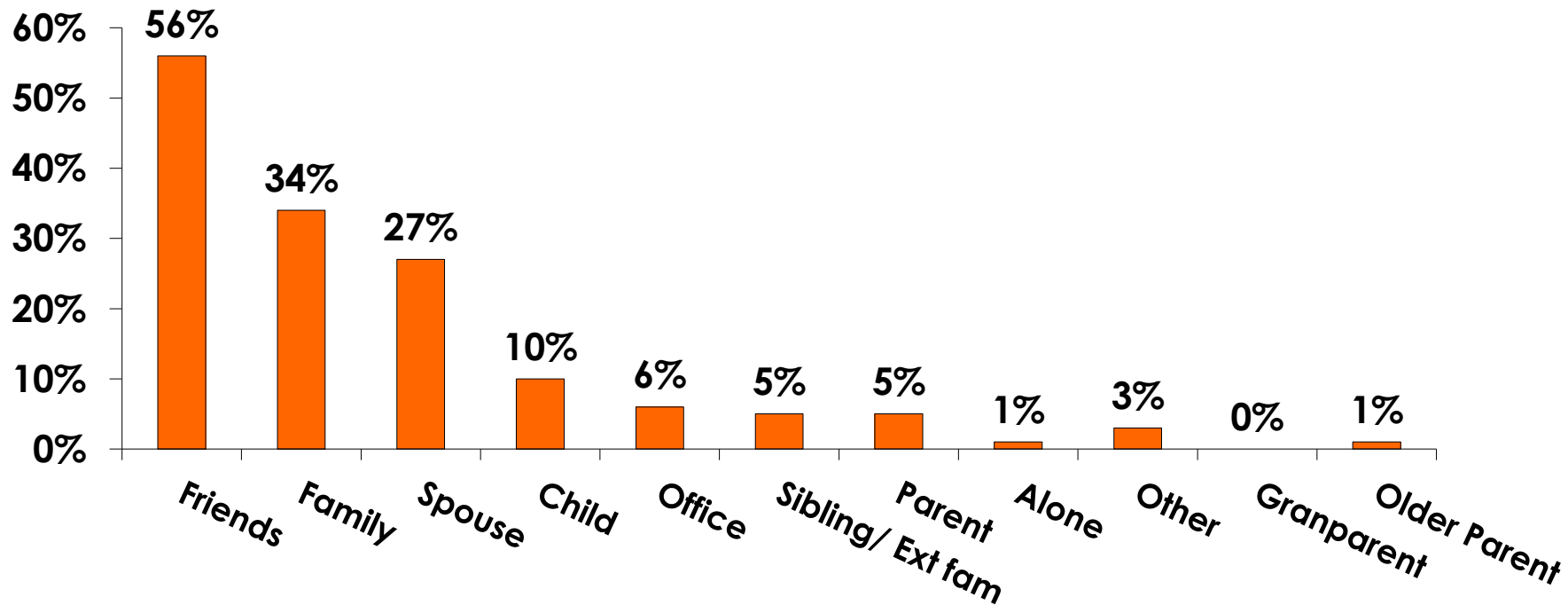
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	17	5	12	12	5		
		Column N %	5%	3%	8%	10%	5%		
Y2.0M-Y3.0M	Y2.0M-Y3.0M	Count	30	6	24	15	13		2
		Column N %	10%	4%	16%	13%	12%		8%
Y3.0M-Y4.0M	Y3.0M-Y4.0M	Count	39	15	24	14	20	5	
		Column N %	12%	9%	16%	12%	18%	8%	
Y4.0M-Y5.0M	Y4.0M-Y5.0M	Count	50	26	24	18	21	8	3
		Column N %	16%	16%	16%	16%	19%	13%	12%
Y5.0M-Y7.0M	Y5.0M-Y7.0M	Count	58	46	12	7	28	16	5
		Column N %	18%	28%	8%	6%	26%	26%	19%
Y7.0M-Y10.0M	Y7.0M-Y10.0M	Count	48	30	17	16	10	16	5
		Column N %	15%	18%	12%	14%	9%	26%	19%
Y10.0M+	Y10.0M+	Count	55	28	27	19	10	16	10
		Column N %	18%	17%	18%	17%	9%	26%	38%
No Income	No Income	Count	17	10	7	14	2		1
		Column N %	5%	6%	5%	12%	2%		4%
Total	Count	314	166	147	115	109	61	26	

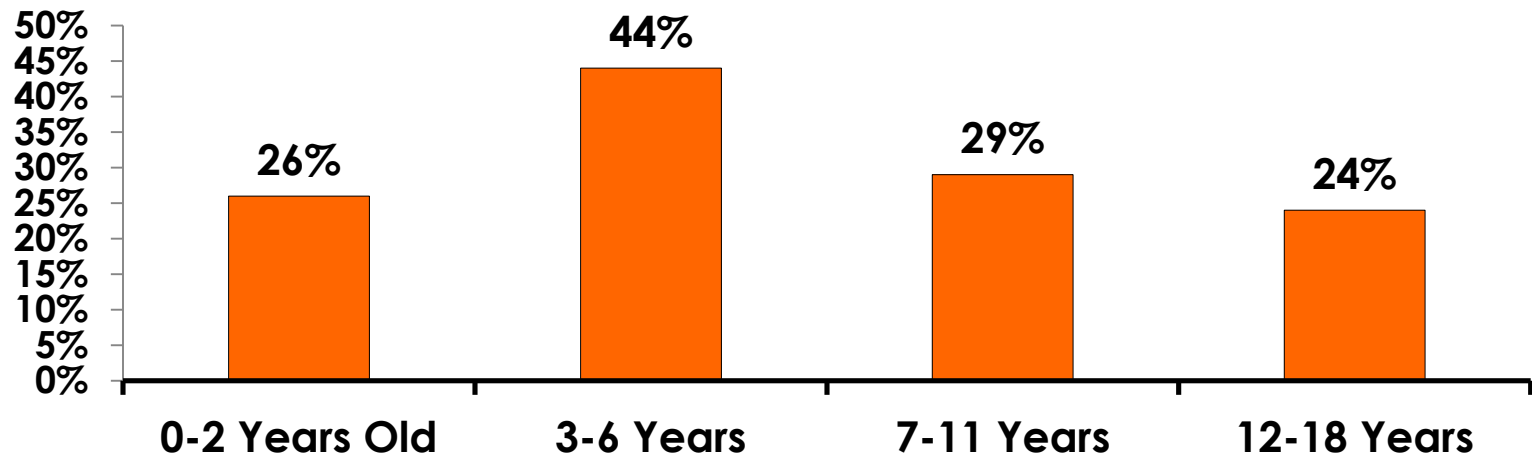
Travel Companions



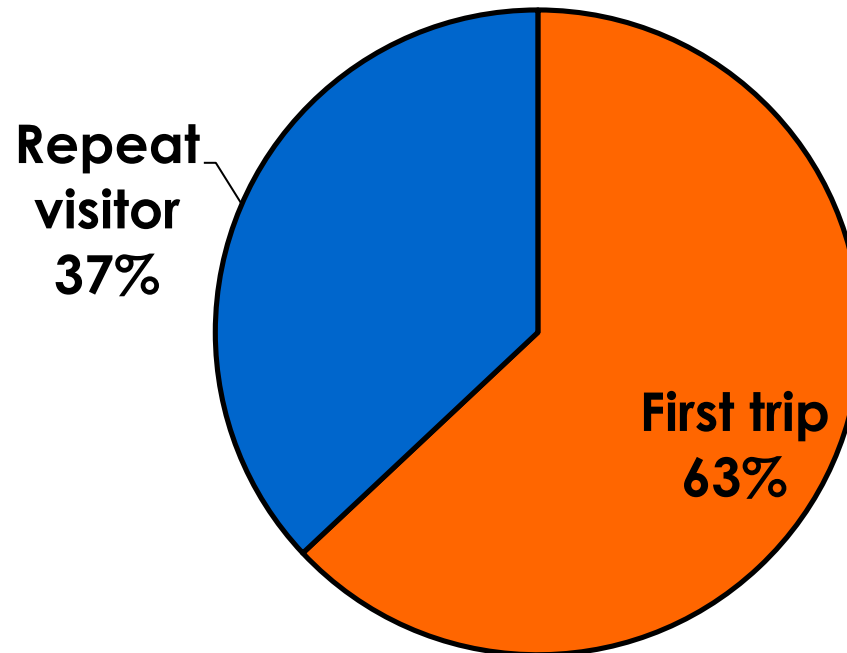
Number of Children Travel Party

N=34 total respondents traveling with children.

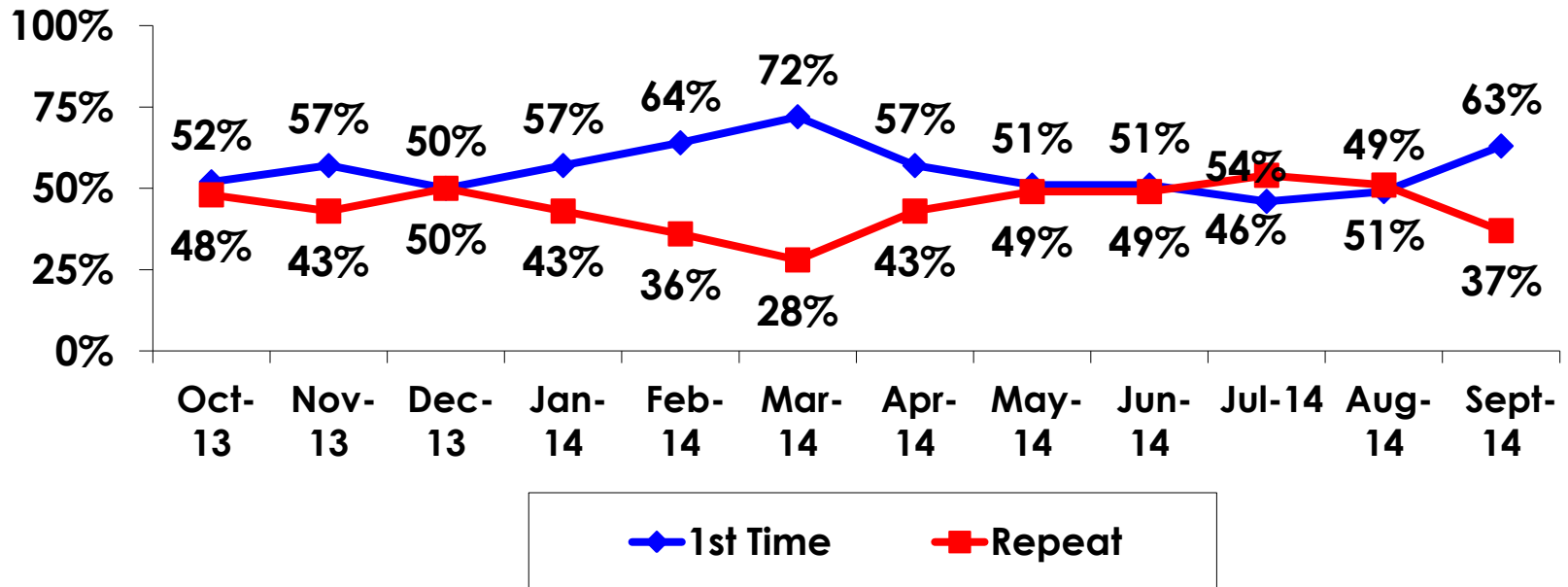
(Of those N=34 respondents, there is a total of 48 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



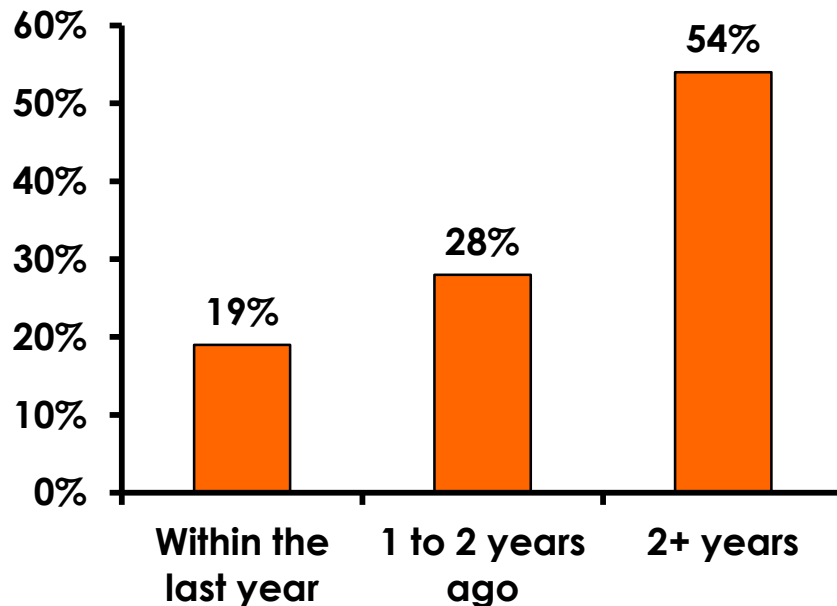
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	176	109	67	
		Column N %	50%	49%	52%	
	Female	Count	174	112	61	
		Column N %	50%	51%	48%	
	Total	Count	350	221	128	
AGE	18-24	Count	142	104	38	
		Column N %	41%	48%	30%	
	25-34	Count	112	77	34	
		Column N %	32%	35%	27%	
	35-49	Count	65	27	38	
		Column N %	19%	12%	30%	
	50+	Count	28	10	18	
		Column N %	8%	5%	14%	
		Total	Count	347	218	128

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

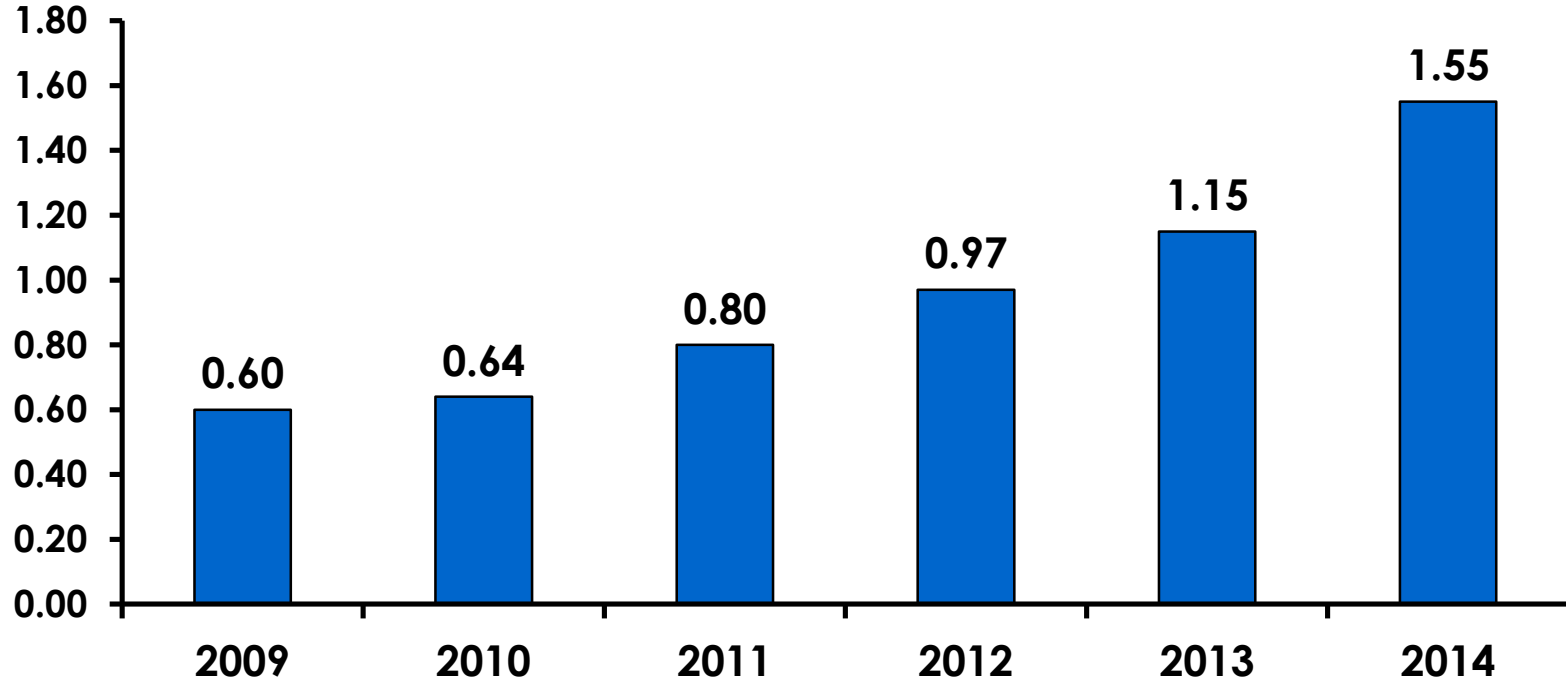
Repeat Visitors Last Trip

n = 123



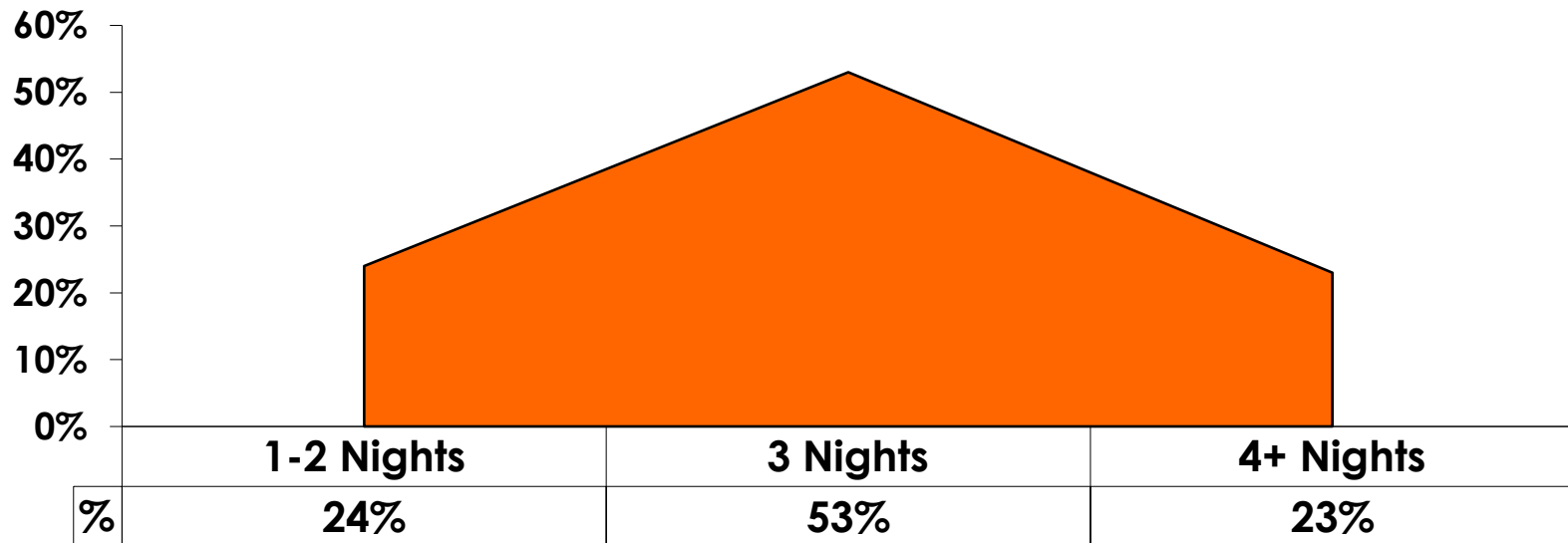
- The average repeat visitor has been to Guam 3.05 times.
- Half the repeat visitors have been to Guam within the last 2 years.

Average Number Overnight Trips (2009-2014) (2 nights or more)

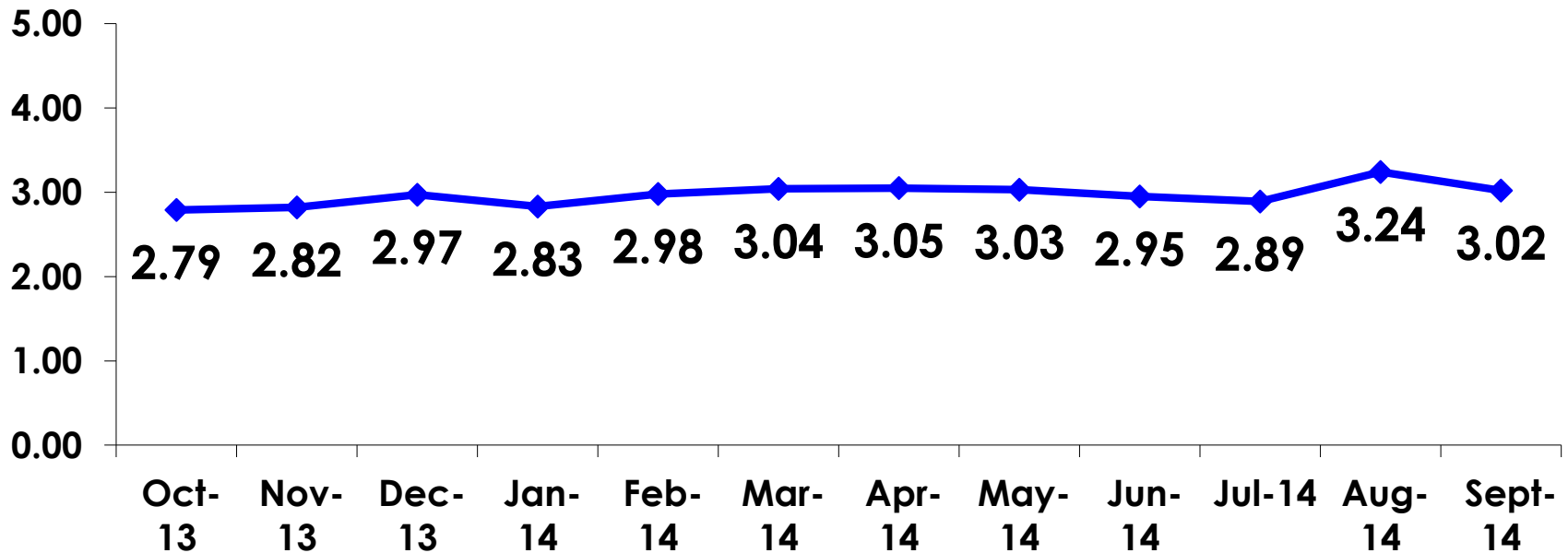


Length of Stay

Mean = 3.02 Days
Median = 3.0 Days



AVG LENGTH OF STAY

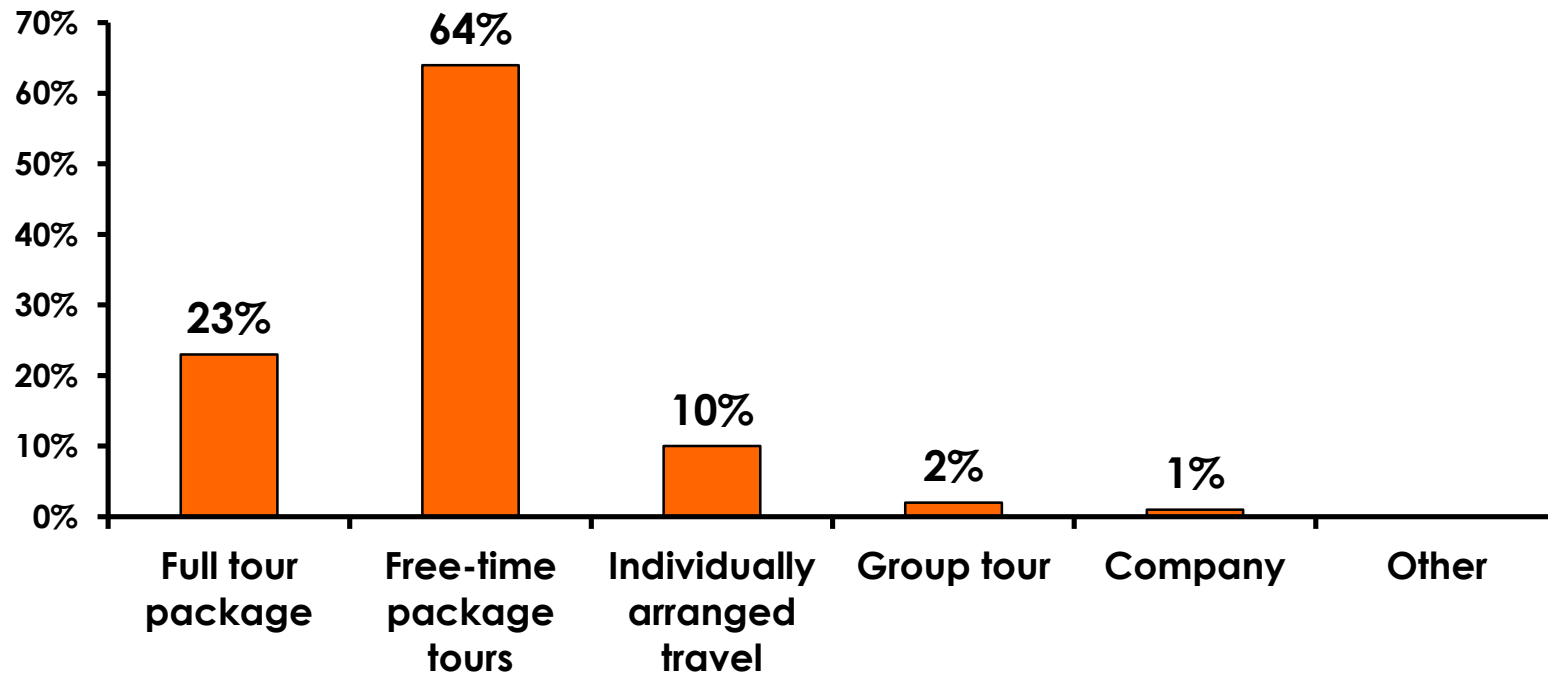


Occupation by Income

		TOTAL	Q26							No Income	
		-	<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+		
Q25	Student	26%	65%	10%	15%	26%	7%	15%	20%	82%	
	Office worker non-mgr	20%	6%	37%	38%	16%	21%	19%	20%		
	Engineer	11%		10%	13%	12%	19%	23%	5%		
	Salesperson	10%		10%	5%	22%	16%	13%	7%		
	Manager	8%				4%	10%	13%	24%		
	Professional/ Specialist	4%	6%	7%	5%	6%	2%		7%		
	Self-employed	4%	18%	3%		2%	10%		4%	6%	
	Homemaker	4%	6%	3%			5%	4%	7%		
	Skilled worker	3%		3%	8%		2%	4%	4%		
	Govt- office worker non-mgr	3%		7%		8%	3%	2%			
	Other	2%		3%	10%	2%	2%				
	Freeter	1%		7%				2%			
	Govt- Manager	1%				2%	3%	2%			
	Unemployed	1%							2%	12%	
	Executive (30+ employees)	1%			3%			2%			
	Teacher	0%						2%			
	Govt- Executive	0%			3%						
	Total	Count	348	17	30	39	50	58	48	55	17

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

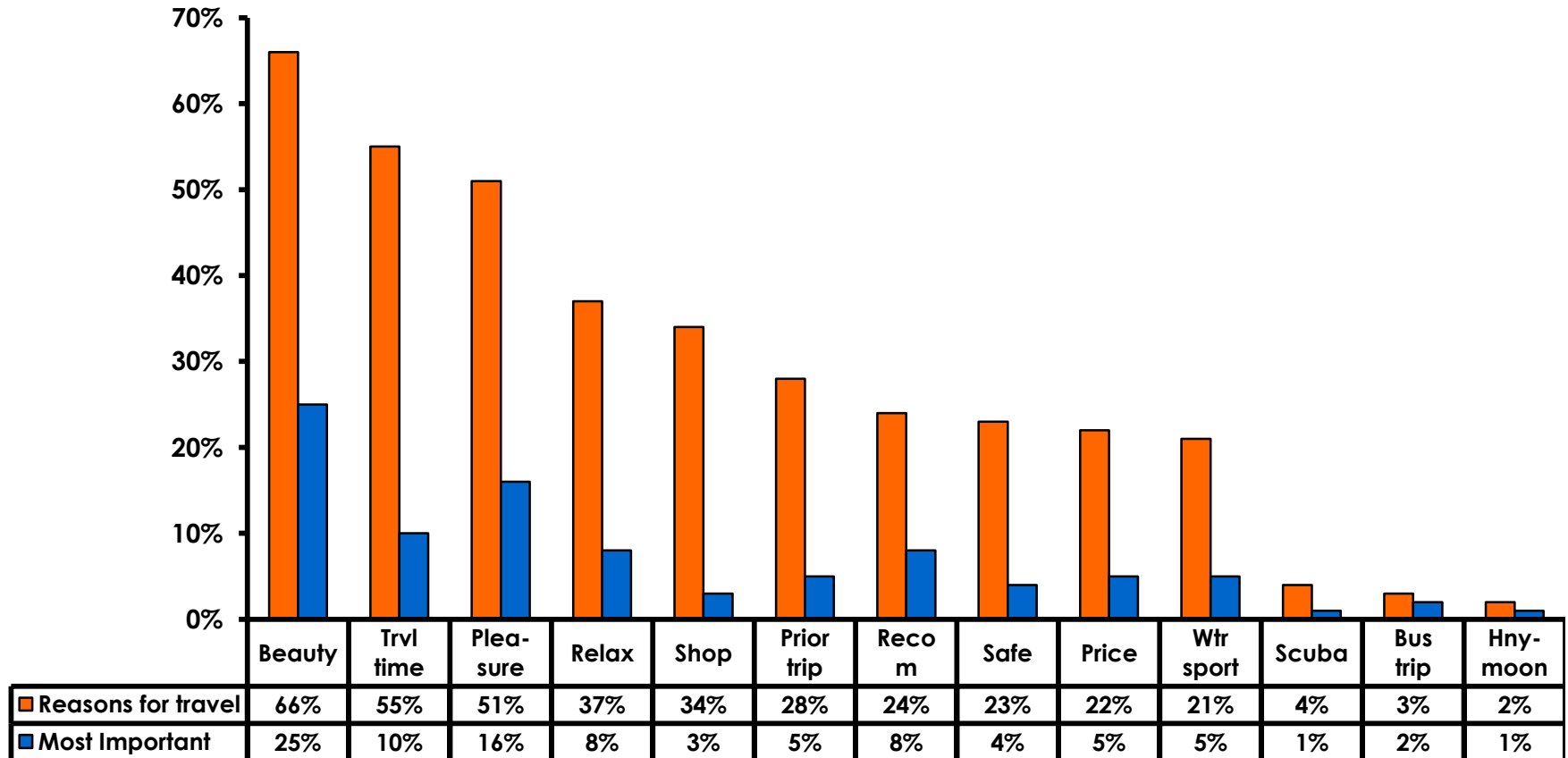


Accommodation by Income

Average length of stay: 3.02 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	17%	24%	23%	18%	10%	16%	17%	15%	29%	
	Grand Plaza Hotel	10%	12%	17%	10%	8%	3%	6%	7%	35%	
	Fiesta Resort Guam	7%	6%		15%	8%	7%	6%	5%	12%	
	Hotel Nikko Guam	7%		7%	3%	10%	3%	8%	13%	6%	
	Guam Reef & Olive Spa	7%		17%	13%		5%	8%	7%	6%	
	PIC Club	6%	18%	7%	5%	8%	3%	4%	5%	6%	
	Onward Beach Resort	6%			5%	6%	7%	6%	9%		
	Westin Resort Guam	6%		10%	3%	2%	9%	4%	11%		
	Hilton Guam Resort	5%	6%		5%	8%	7%	2%	5%		
	Outrigger Guam Resort	5%	6%	3%	3%	6%	9%	8%	2%		
	Royal Orchid Guam	4%		3%	5%	10%	2%	2%	2%		
	Pacific Bay Hotel	3%	18%	3%		2%	3%	2%	2%		
	Holiday Resort Guam	3%			3%	6%	5%	4%	2%	6%	
	Leo Palace Resort	3%		3%	3%	4%	7%	4%	2%		
	Hyatt Regency Guam	3%		3%	5%	2%	3%	2%	4%		
	Sheraton Laguna Guam	2%				4%	2%	2%	5%		
	Bayview Hotel	2%			3%	6%	3%				
	Oceanview Hotel	2%			3%			6%	2%		
	Tumon Bay Capital Hotel	1%		3%			2%		2%		
	Other	1%					2%	4%			
	Hotel Santa Fe	1%	12%								
	Guam Aurora Resort	0%						2%			
	Guam Marriott Resort	0%					2%				
	Total	Count	351	17	30	39	50	58	48	55	17

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

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

are 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	66%	70%	71%	55%	43%	63%	69%	
	Short travel time	55%	40%	59%	68%	75%	59%	51%	
	Pleasure	51%	50%	50%	49%	61%	46%	56%	
	Relax	37%	26%	46%	38%	54%	35%	40%	
	Shopping	34%	36%	30%	34%	32%	24%	43%	
	Previous trip	28%	18%	22%	51%	46%	30%	25%	
	Recomm- friend/family/trvl agnt	24%	33%	24%	11%	14%	21%	28%	
	Safe	23%	18%	22%	23%	46%	20%	26%	
	Price	22%	23%	21%	17%	36%	23%	21%	
	Water sports	21%	23%	22%	14%	25%	22%	20%	
	Scuba	4%	6%	1%	6%	4%	6%	3%	
	Company/ Business Trip	3%	3%	2%	6%		3%	3%	
	Honeymoon	2%		3%	6%		4%		
	Golf	2%		1%	5%	11%	2%	2%	
	Other	2%	1%	1%	2%	7%	3%	1%	
	Married/ Attn wedding	2%	1%		5%	4%	3%	1%	
	Visit friends/ Relatives	1%	1%	1%	2%	4%	2%	1%	
	Organized sports	1%	2%				1%	1%	
	Company Sponsored	1%	1%		3%		1%	1%	
	Total	Count	350	141	112	65	28	176	173

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	66%	47%	70%	63%	66%	62%	60%	67%	94%	
	Short travel time	55%	24%	67%	55%	52%	60%	69%	55%	24%	
	Pleasure	51%	29%	60%	53%	40%	47%	65%	55%	47%	
	Relax	37%	35%	47%	37%	38%	45%	33%	38%	29%	
	Shopping	34%	18%	40%	34%	30%	24%	44%	44%	24%	
	Previous trip	28%	29%	27%	29%	22%	22%	38%	47%	12%	
	Recomm- friend/family/trvl agnt	24%	18%	33%	29%	30%	22%	15%	20%	12%	
	Safe	23%	12%	30%	16%	20%	28%	25%	29%	12%	
	Price	22%	29%	10%	24%	26%	26%	29%	18%	24%	
	Water sports	21%	12%	27%	13%	20%	29%	15%	18%	35%	
	Scuba	4%	6%	3%	5%	2%	5%	6%	2%	6%	
	Company/ Business Trip	3%		3%	5%		7%	4%	2%		
	Honeymoon	2%	6%		5%	2%	2%	2%	2%		
	Golf	2%					3%	4%	5%		
	Other	2%					3%	4%	2%		
	Married/ Attn wedding	2%			3%	4%			4%		
	Visit friends/ Relatives	1%				2%	2%	2%	2%		
	Organized sports	1%		3%		2%	2%				
	Company Sponsored	1%		3%			3%				
	Total	Count	350	17	30	38	50	58	48	55	17

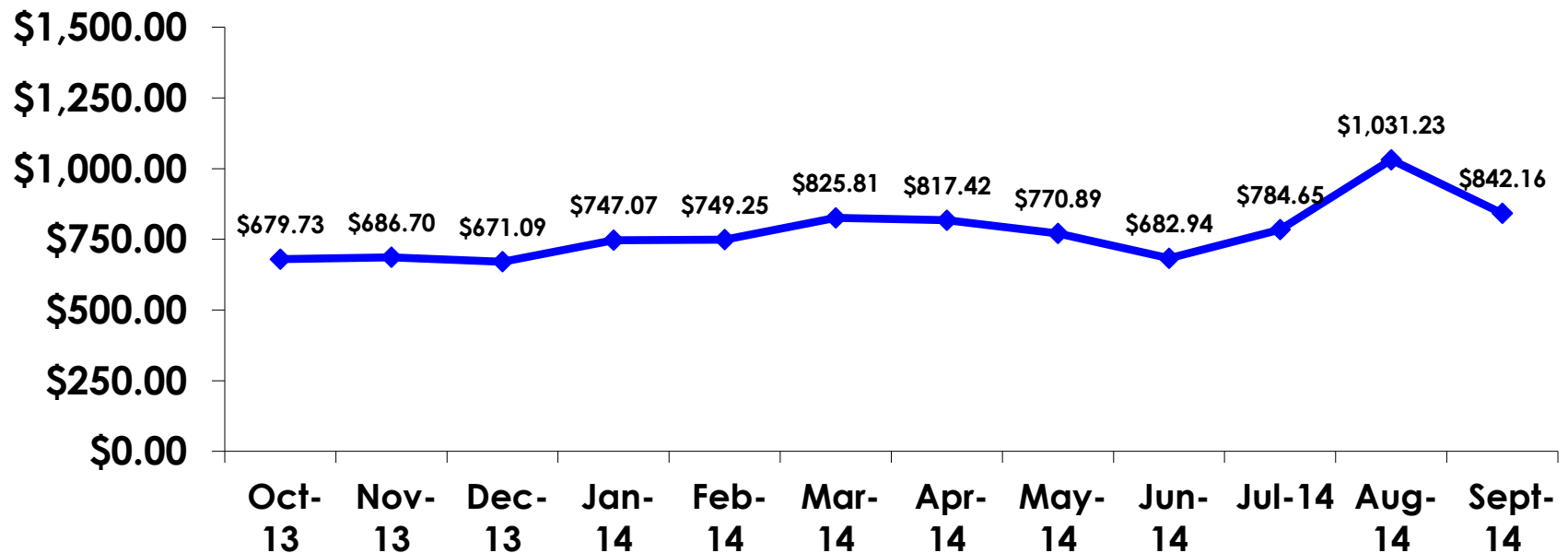
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥106.79/US\$1

- \$1,381.37 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$7,491 = maximum (highest amount recorded for the entire sample)
- \$842.16 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES Per Person



YTD=\$774.17

Breakdown of Prepaid Expenditures

¥106.79=\$1

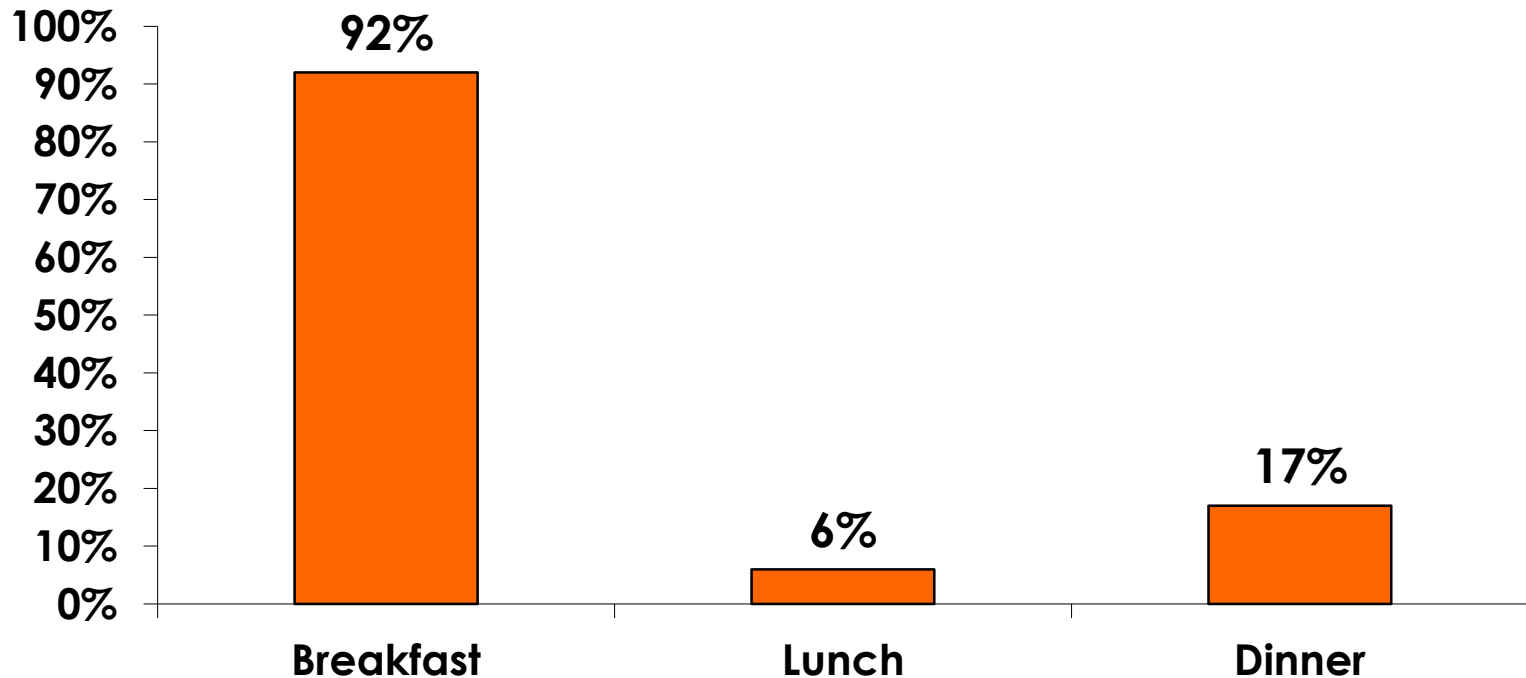
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,352.04
Air & Accommodation w/ daily meal package	\$1,909.28
Air only	\$1,110.32
Accommodation only	\$504.81
Accommodation w/ daily meal only	\$1,254.80
Food & Beverages in Hotel	\$37.46
Ground transportation – Japan	\$48.55
Ground transportation – Guam	\$126.88
Optional tours/ activities	\$179.14
Other expenses	\$213.01
Total Prepaid	\$1,381.37

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=36

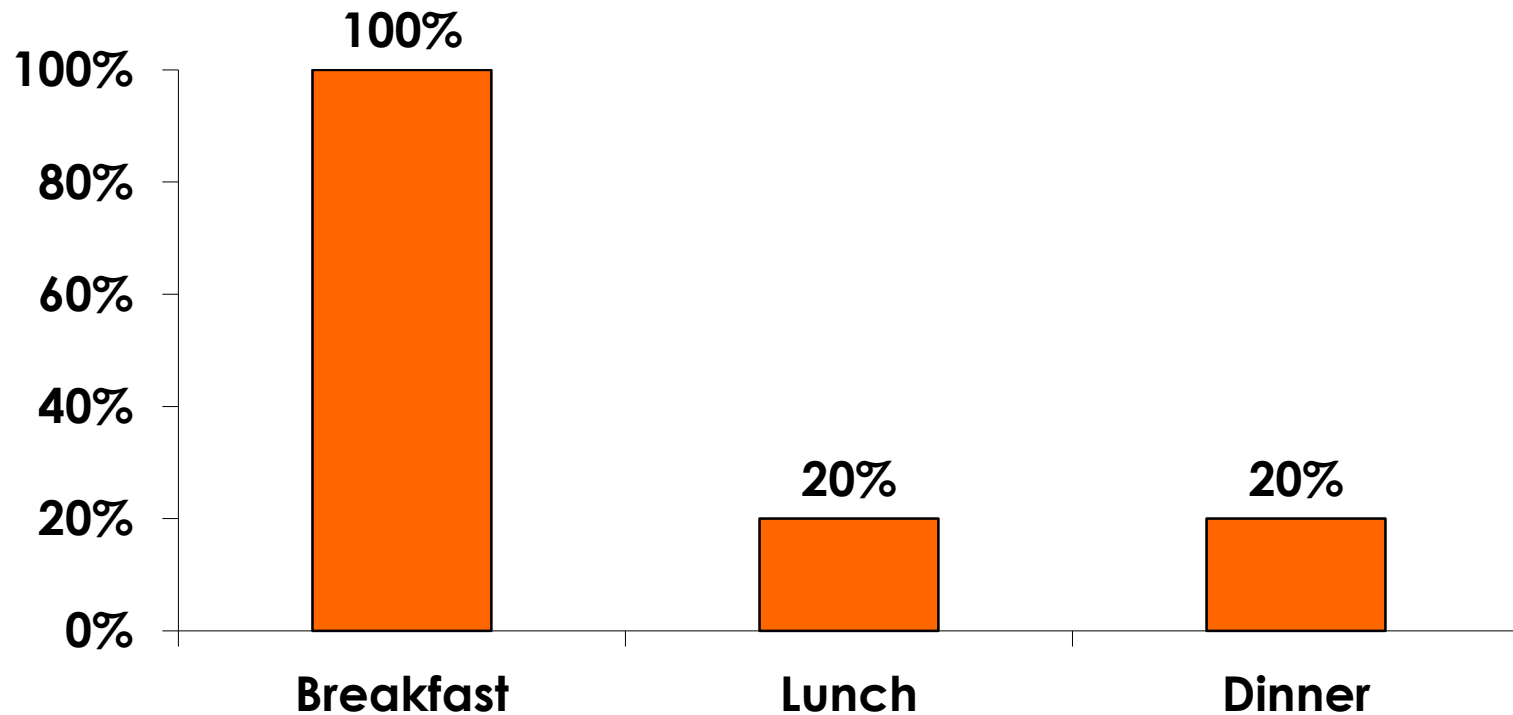


Mean=\$1,909.28 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

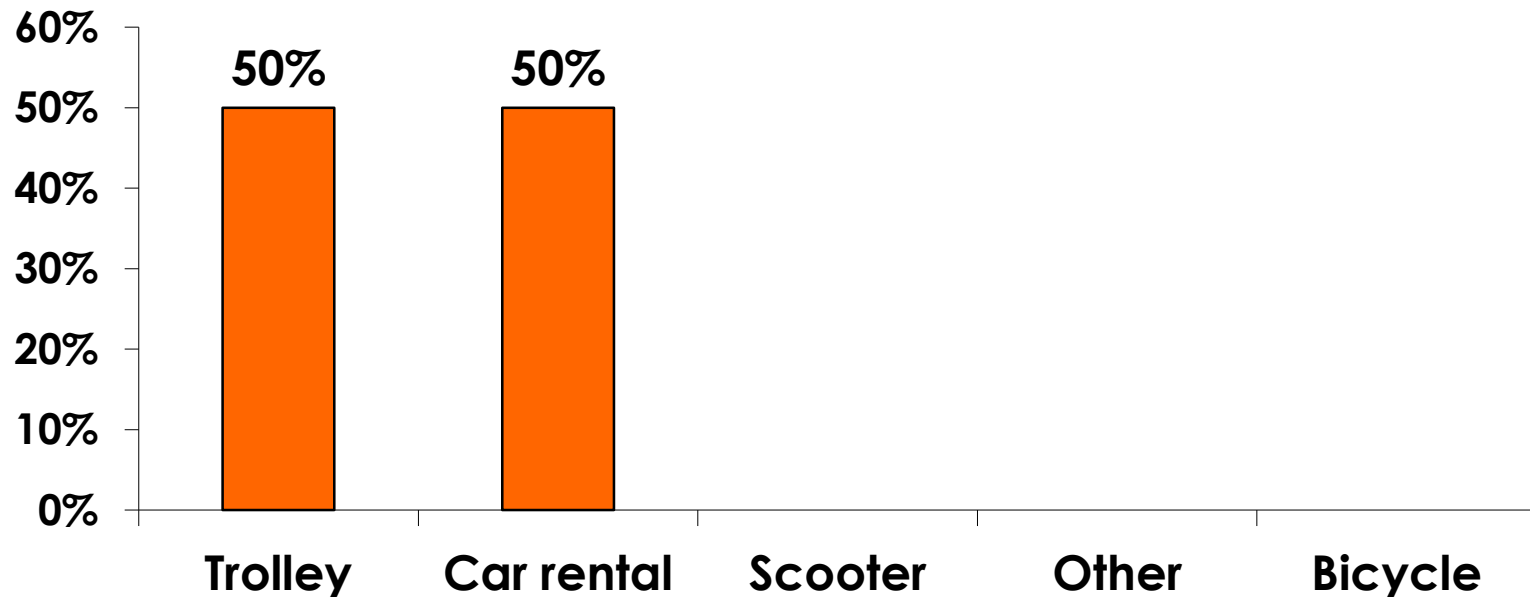
N=5



Mean=\$1,254.80 per travel party

PREPAID GROUND TRANSPORTATION

n=4



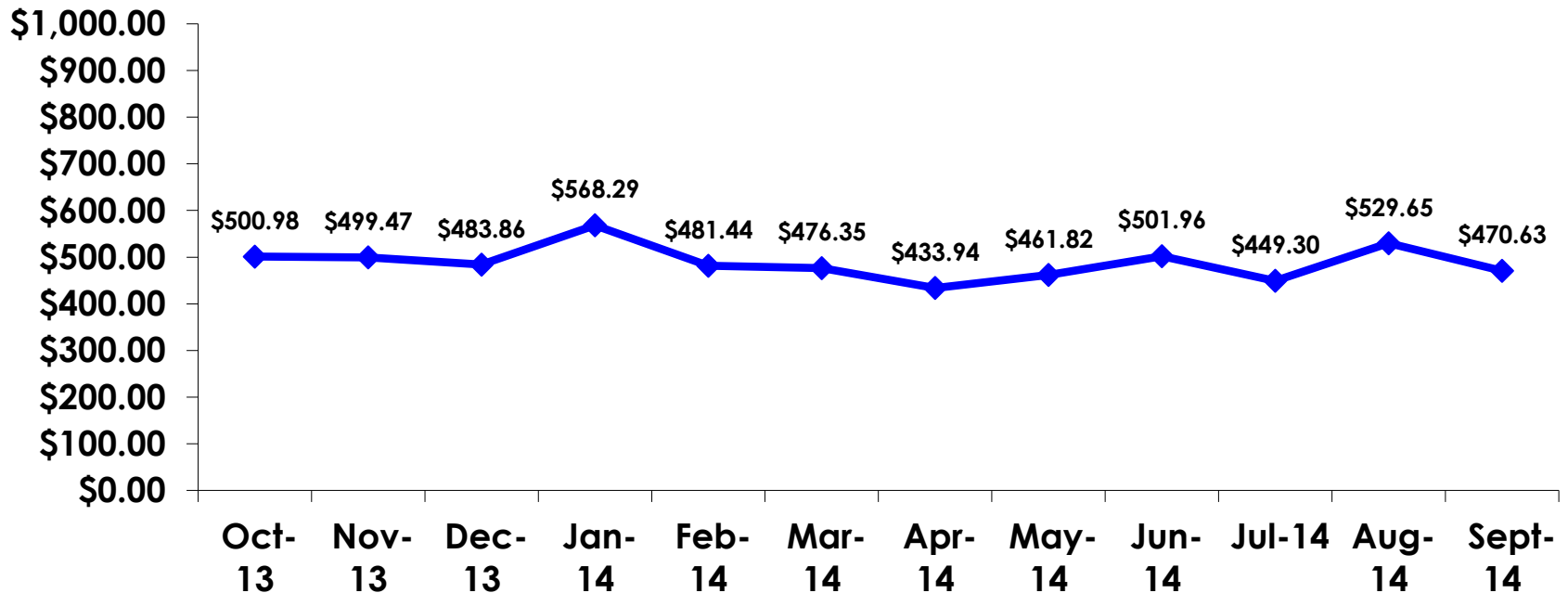
Mean=\$126.88 per travel party

On-Island Expenditures

- \$713.92 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,000 = Maximum (highest amount recorded for the entire sample)
- \$470.63 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

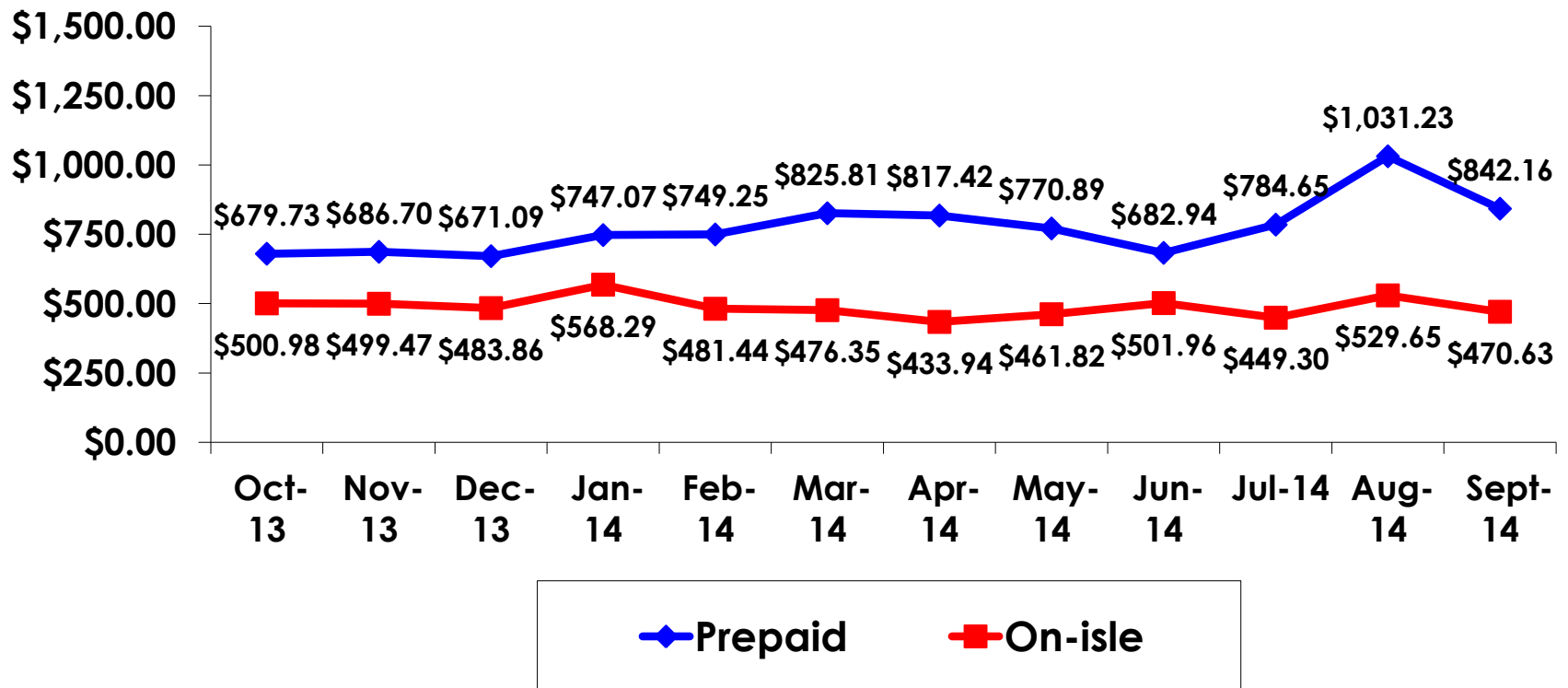


YTD = \$488.15

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$774.17

On-Isle YTD = \$488.15



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
					AGE				AGE			
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$470.63	\$442.88	\$495.67	\$431.53	\$511.18	\$418.06	\$323.75	\$402.54	\$566.96	\$695.25	\$1,255.00
	Median	\$380	\$384	\$377	\$400	\$400	\$326	\$263	\$300	\$430	\$500	\$385
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$100	\$0	\$250
	Maximum	\$4,000	\$3,000	\$4,000	\$1,500	\$3,000	\$1,200	\$1,250	\$1,910	\$2,000	\$1,667	\$4,000

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$35.87	\$58.41	\$13.28	\$15.65	\$27.95	\$82.89	\$66.07
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.73	\$42.37	\$21.16	\$24.32	\$34.91	\$41.31	\$25.71
	Median	\$9	\$15	\$0	\$10	\$0	\$20	\$0
F&B RESTRNT	Mean	\$91.28	\$129.35	\$53.31	\$40.18	\$90.35	\$159.42	\$198.39
	Median	\$40	\$80	\$20	\$10	\$50	\$130	\$105
OPT TOUR	Mean	\$79.30	\$107.01	\$51.74	\$54.69	\$78.66	\$101.05	\$162.57
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$213.64	\$238.00	\$190.22	\$129.05	\$218.96	\$291.92	\$412.61
	Median	\$50	\$50	\$50	\$50	\$83	\$50	\$64
GIFT- OTHER	Mean	\$90.52	\$110.67	\$70.65	\$57.89	\$113.31	\$116.00	\$107.86
	Median	\$50	\$60	\$50	\$40	\$95	\$100	\$40
TRANS	Mean	\$14.13	\$21.58	\$6.68	\$8.10	\$16.32	\$26.80	\$8.61
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$157.29	\$137.04	\$155.70	\$123.40	\$159.05	\$270.62	\$45.86
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$713.92	\$844.63	\$562.82	\$453.77	\$738.44	\$1,091.54	\$1,027.68
	Median	\$500	\$595	\$400	\$352	\$500	\$700	\$530

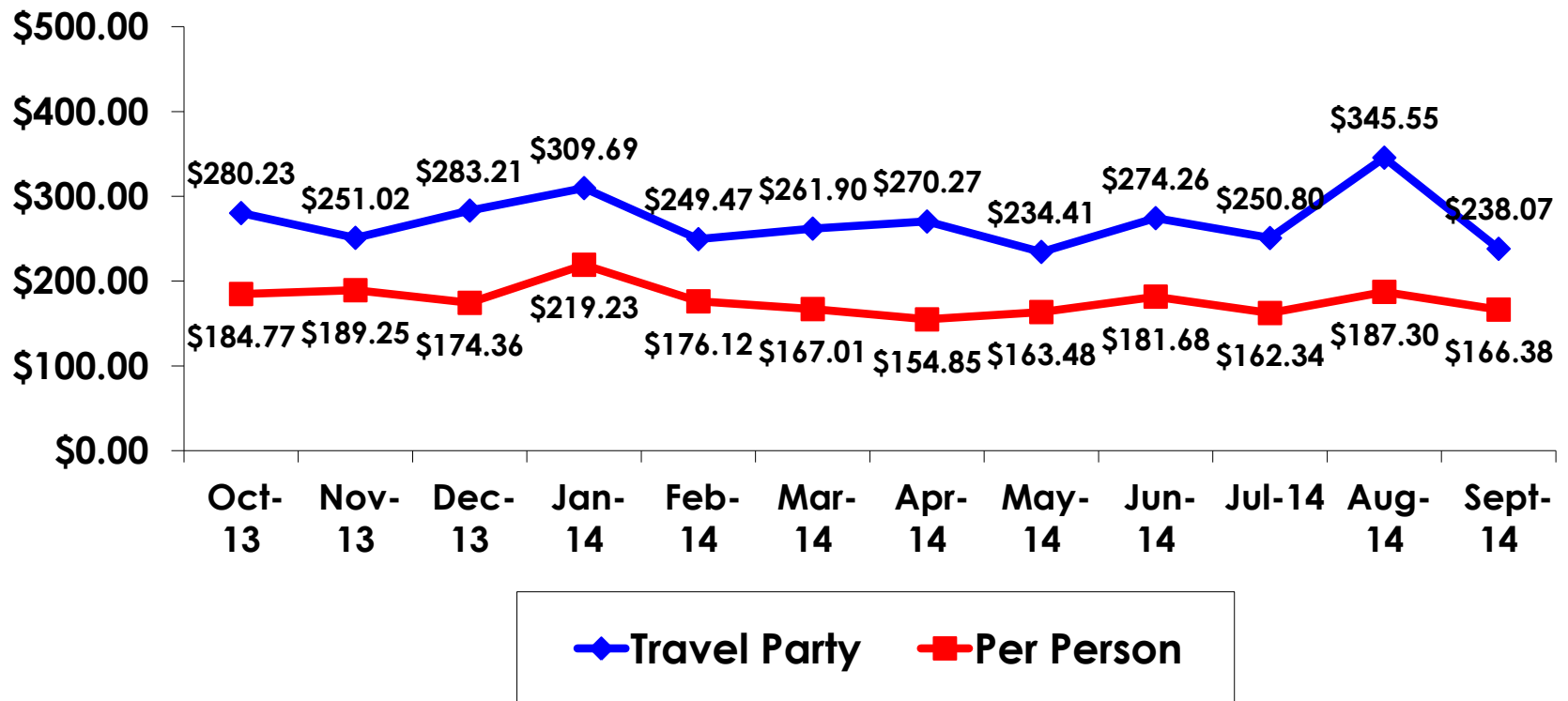
On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$35.87	\$28.01	\$49.57
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.73	\$25.38	\$42.87
	Median	\$9	\$10	\$5
F&B RESTRNT	Mean	\$91.28	\$83.00	\$105.16
	Median	\$40	\$30	\$50
OPT TOUR	Mean	\$79.30	\$74.13	\$87.31
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$213.64	\$159.70	\$306.61
	Median	\$50	\$50	\$75
GIFT- OTHER	Mean	\$90.52	\$84.98	\$99.93
	Median	\$50	\$50	\$50
TRANS	Mean	\$14.13	\$11.86	\$18.15
	Median	\$0	\$0	\$0
OTHER	Mean	\$157.29	\$162.80	\$149.08
	Median	\$0	\$0	\$0
TOTAL	Mean	\$713.92	\$630.01	\$858.80
	Median	\$500	\$450	\$550

ON-ISLE EXPENDITURES – Per Day

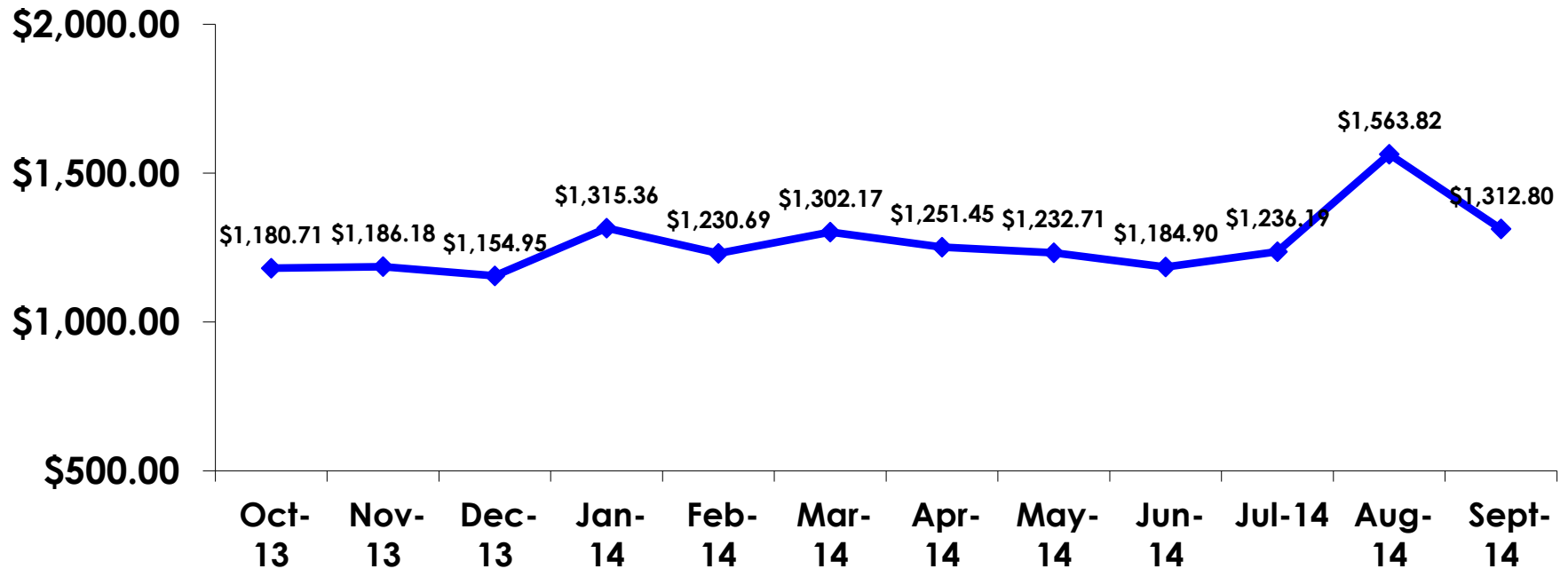
Travel Party YTD = \$270.78 Per Person YTD = \$177.23



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,312.80 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,771 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



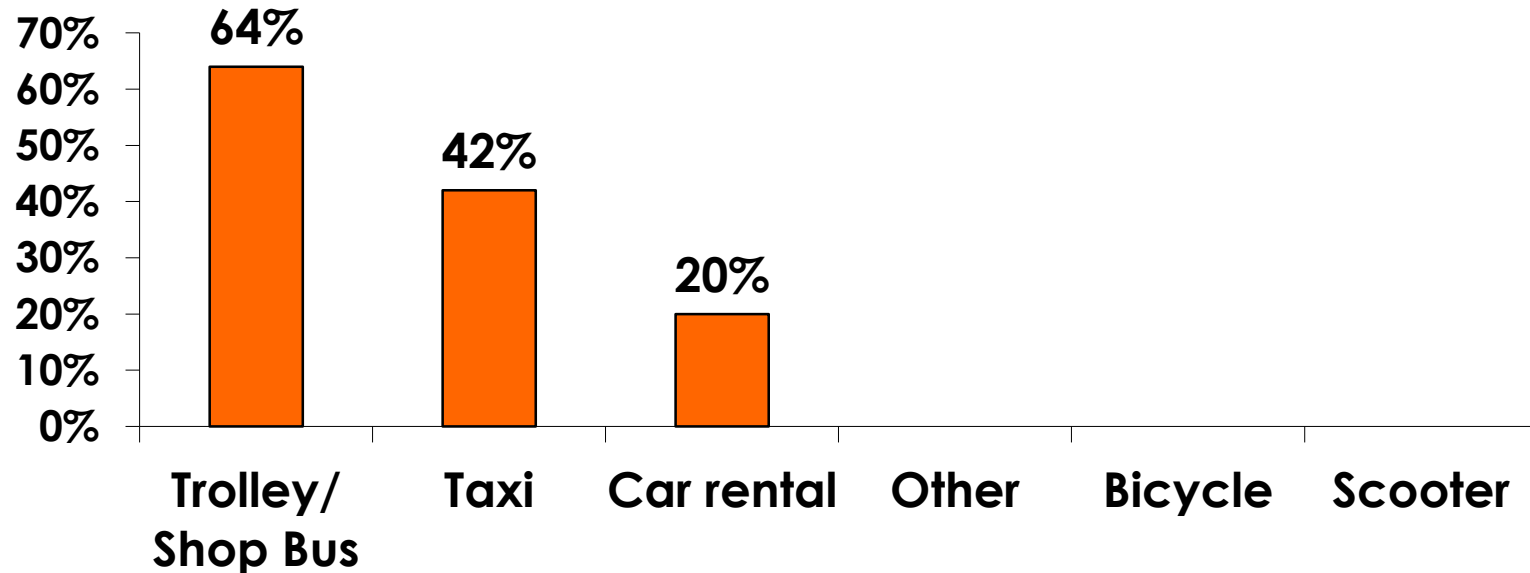
YTD=\$1,262.71

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$35.87
Food & beverage in fast food restaurant/convenience store	\$31.73
Food & beverage at restaurants or drinking establishments outside a hotel	\$91.28
Optional tours and activities	\$79.30
Gifts/ souvenirs for yourself/companions	\$213.64
Gifts/ souvenirs for friends/family at home	\$90.52
Local transportation	\$14.13
Other expenses not covered	\$157.29
Average Total	\$713.92

Local Transportation

n=66



Mean=\$14.13 per travel party

Guam Airport Expenditures

- \$34.55 = Mean
- \$5 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

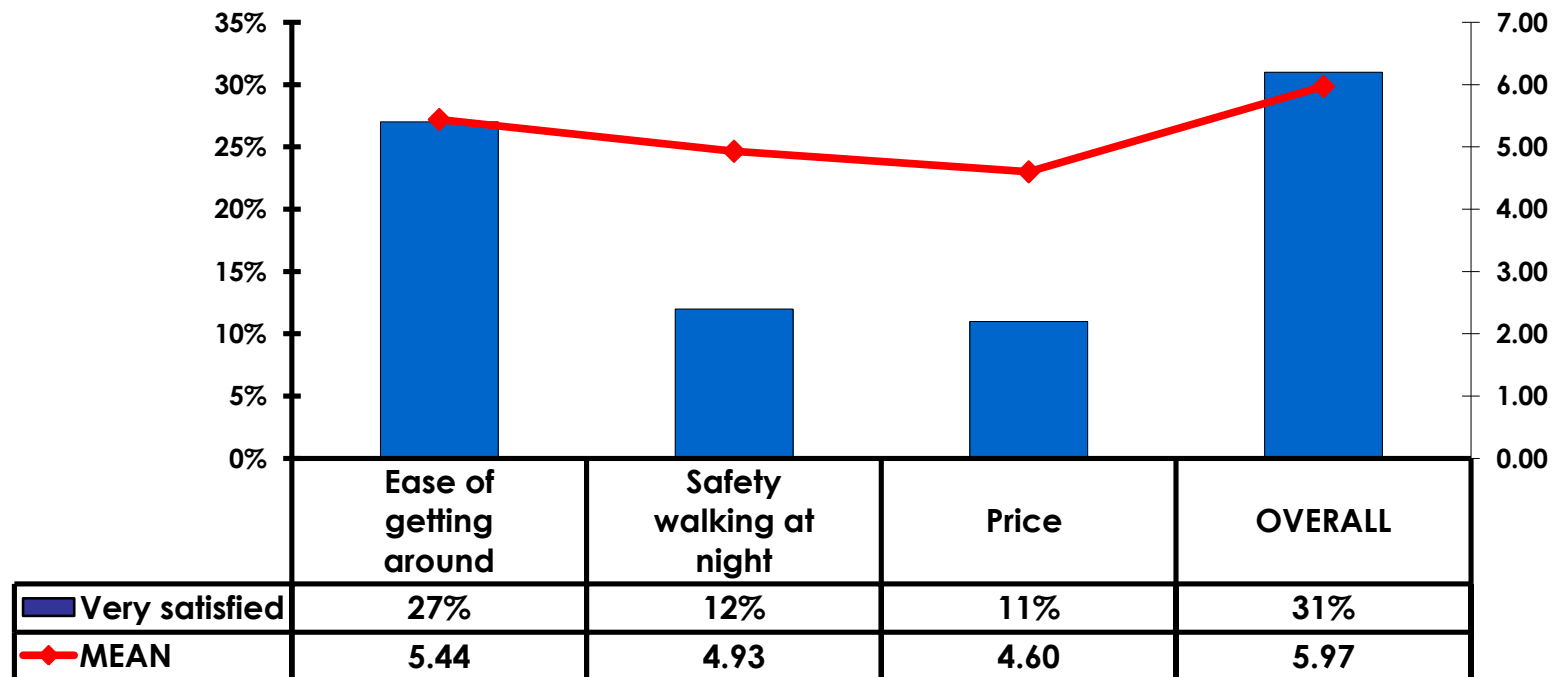
	MEAN \$
Food & Beverages	\$7.80
Gifts/Souvenirs Self	\$17.70
Gifts/Souvenirs Others	\$9.36
Total	\$34.55

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

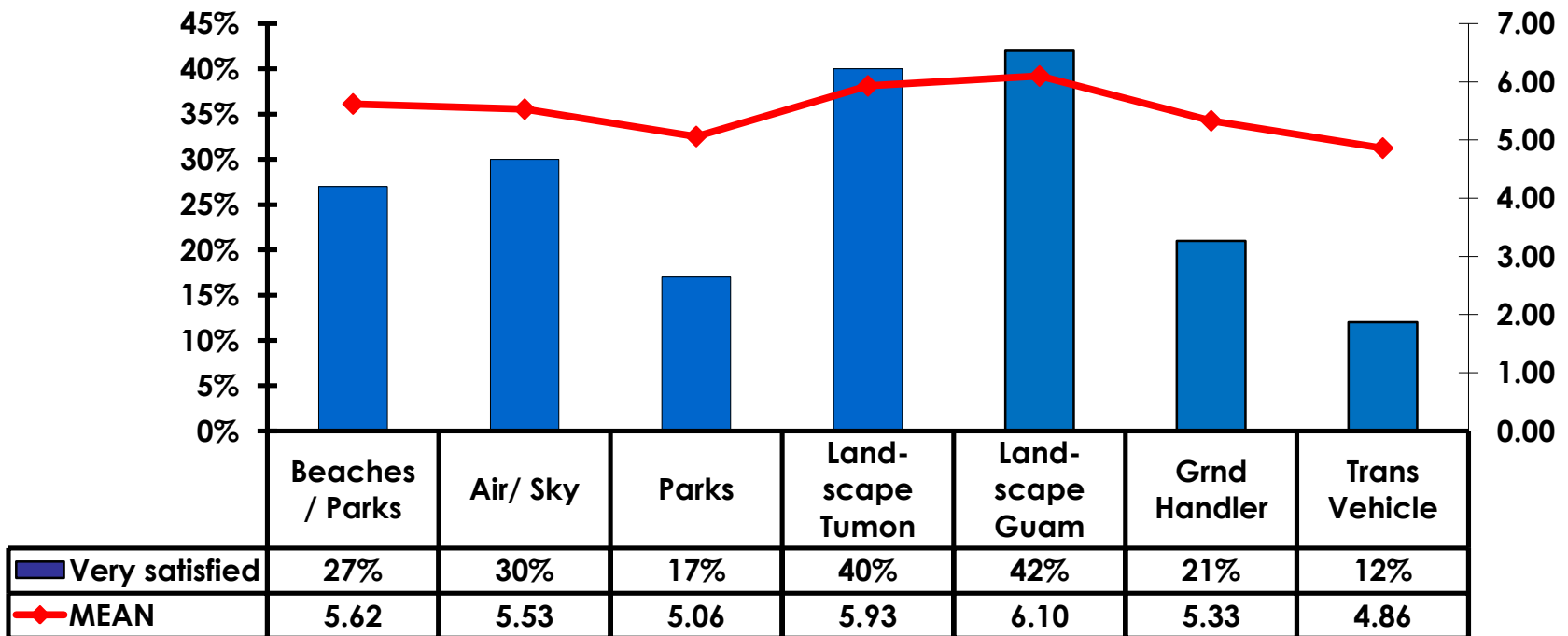
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

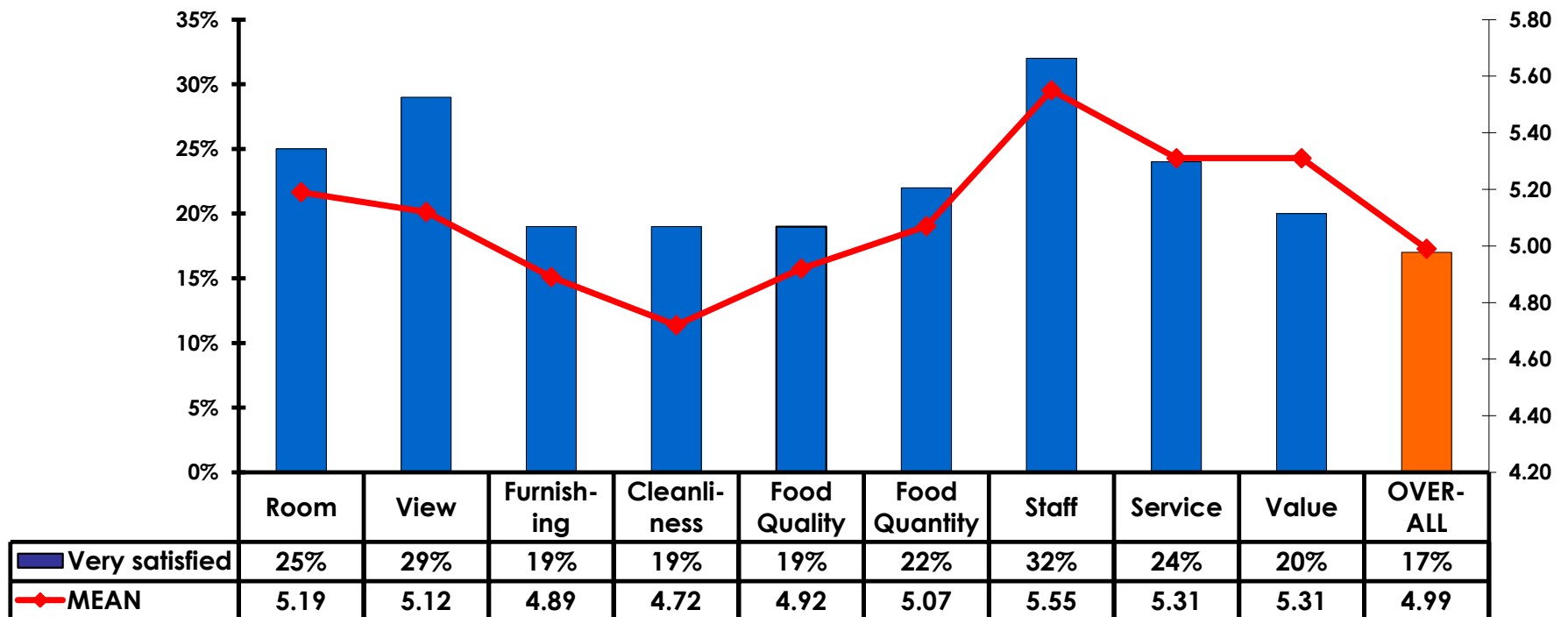
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

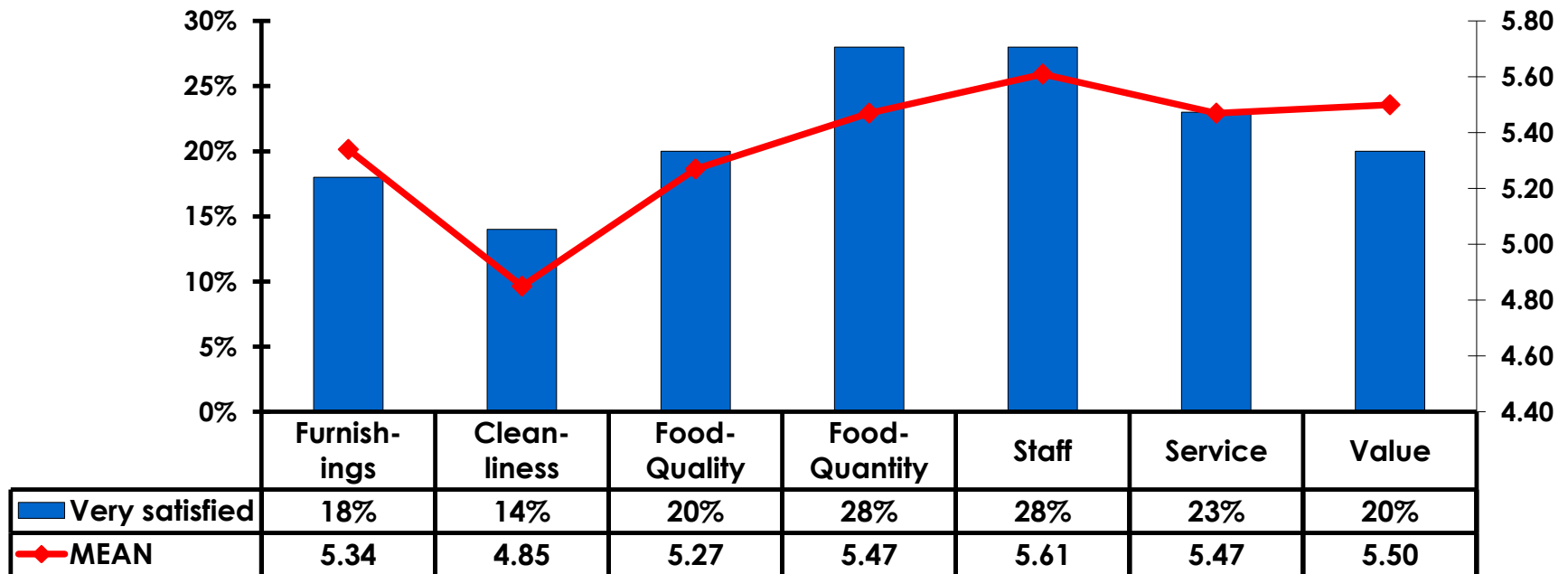
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

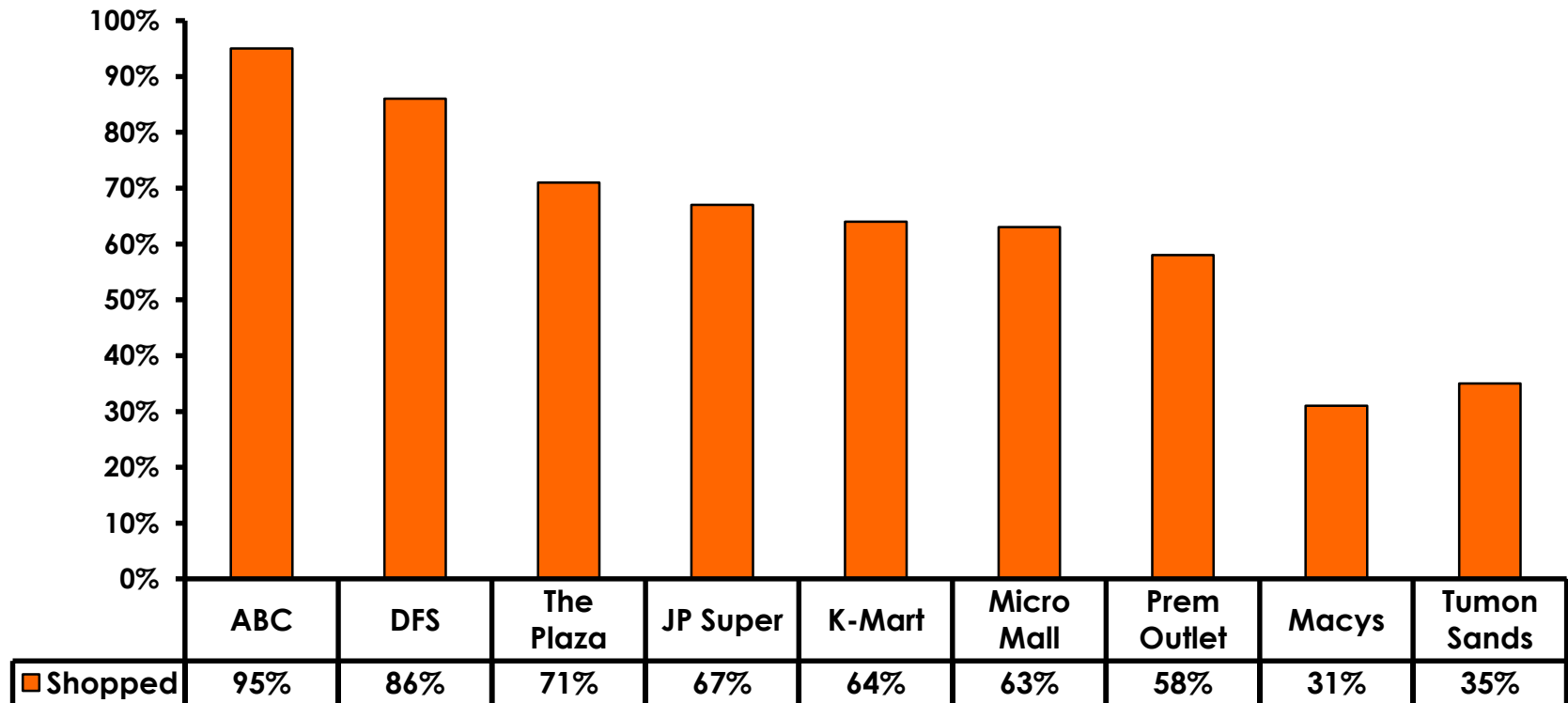
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

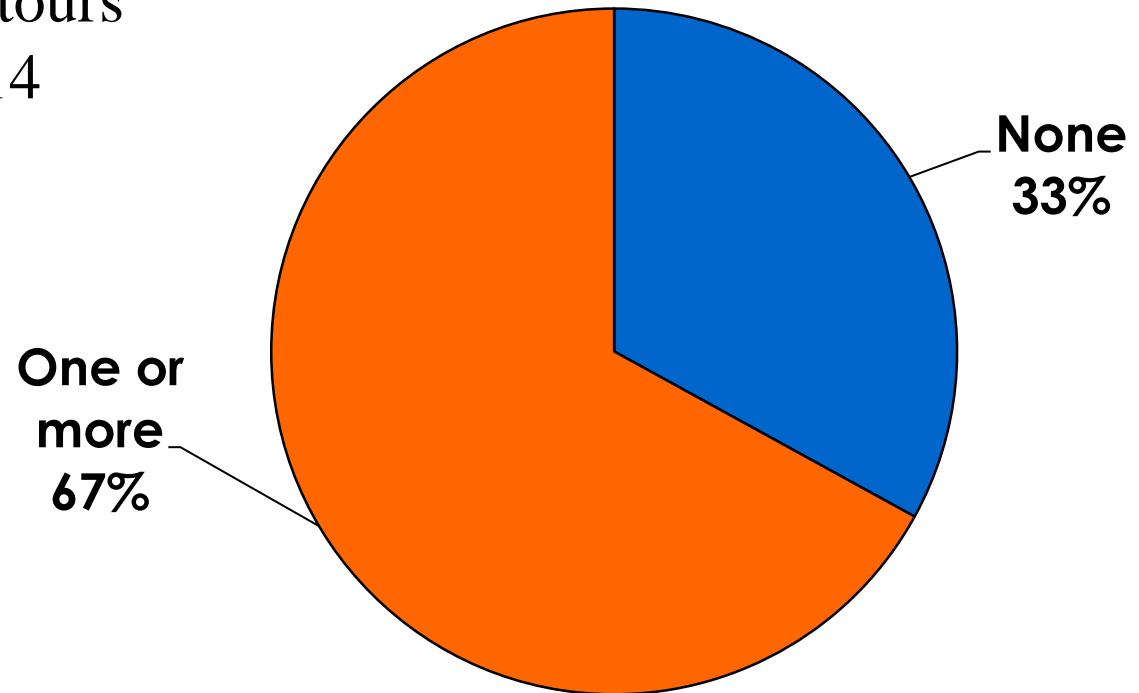
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

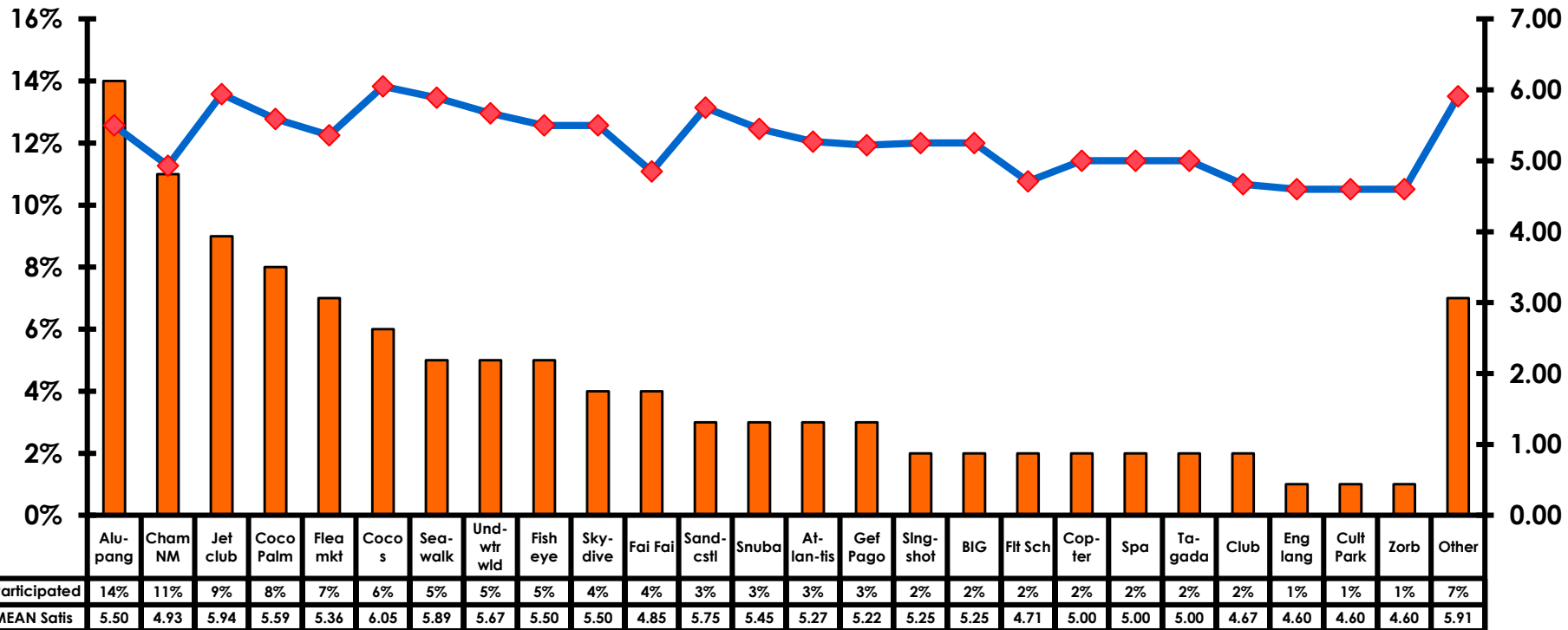
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 56%	Score of 6 to 7 = 54%
Score of 4 to 5 = 40%	Score of 4 to 5 = 41%
Score 1 to 3 = 4%	Score 1 to 3 = 6%
MEAN = 5.45	MEAN = 5.41

Optional Tour Participation

- Average number of tours participated in is 1.14



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 = 54%	Score of 6 to 7 = 52%
Score of 4 to 5 = 43%	Score of 4 to 5 = 47%
Score 1 to 3 = 3%	Score 1 to 3 = 2%
MEAN = 5.45	MEAN = 5.40

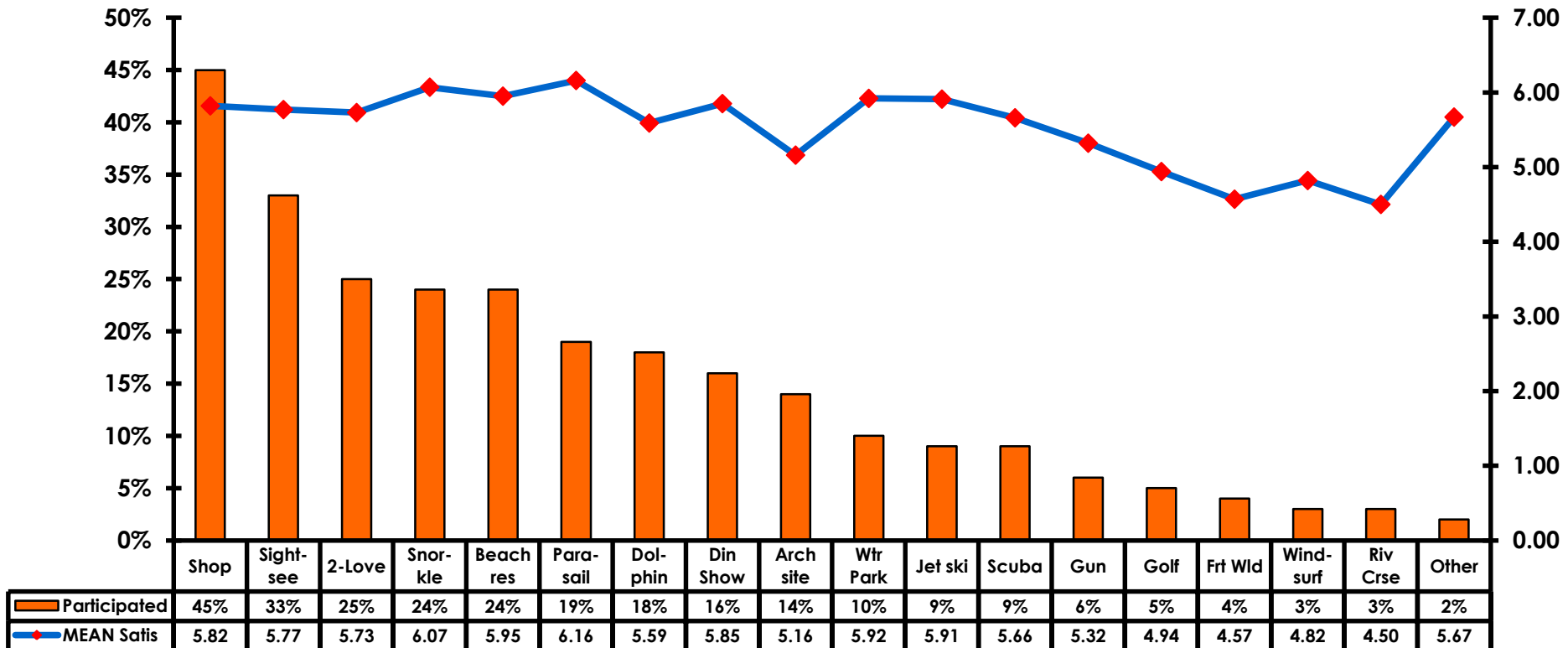
Night Tours Satisfaction

7pt Rating Scale

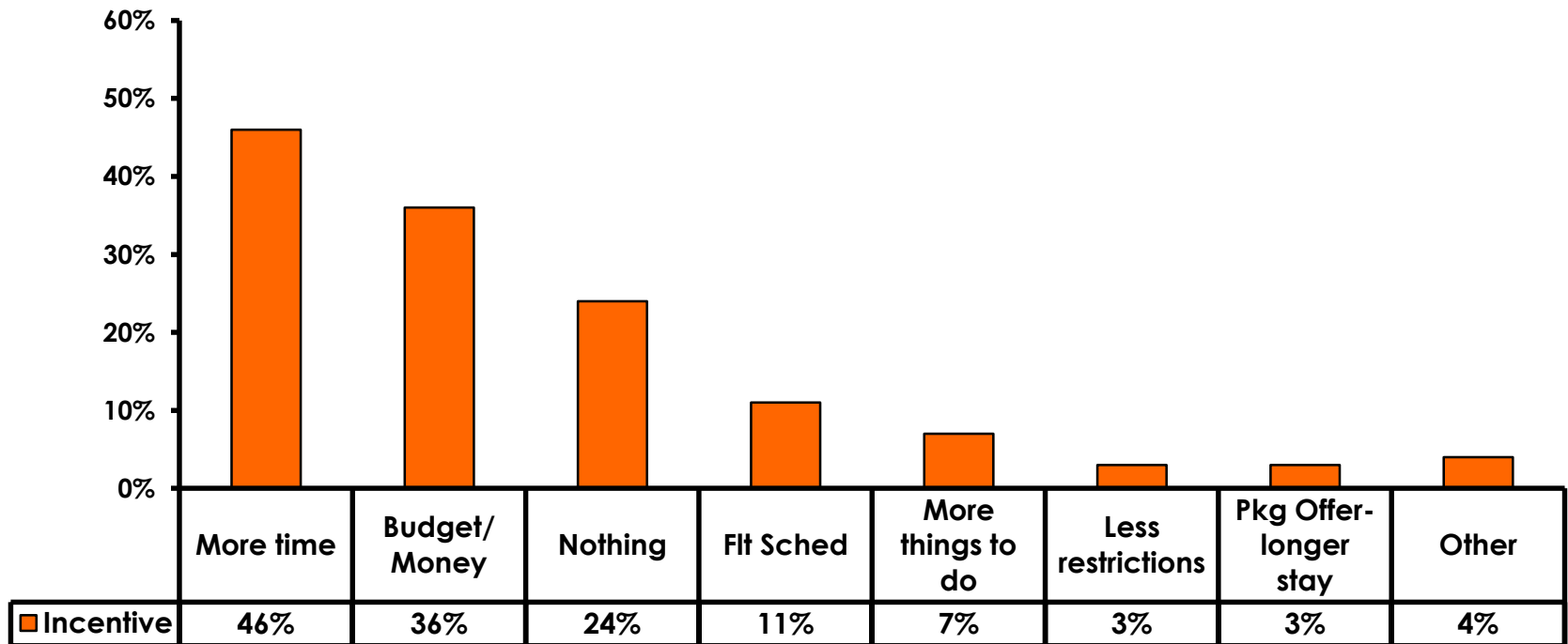
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 31%	Score of 6 to 7 = 28%
Score of 4 to 5 = 67%	Score of 4 to 5 = 70%
Score 1 to 3 = 1%	Score 1 to 3 = 2%
MEAN = 4.83	MEAN = 4.78

Satisfaction with Other Activities



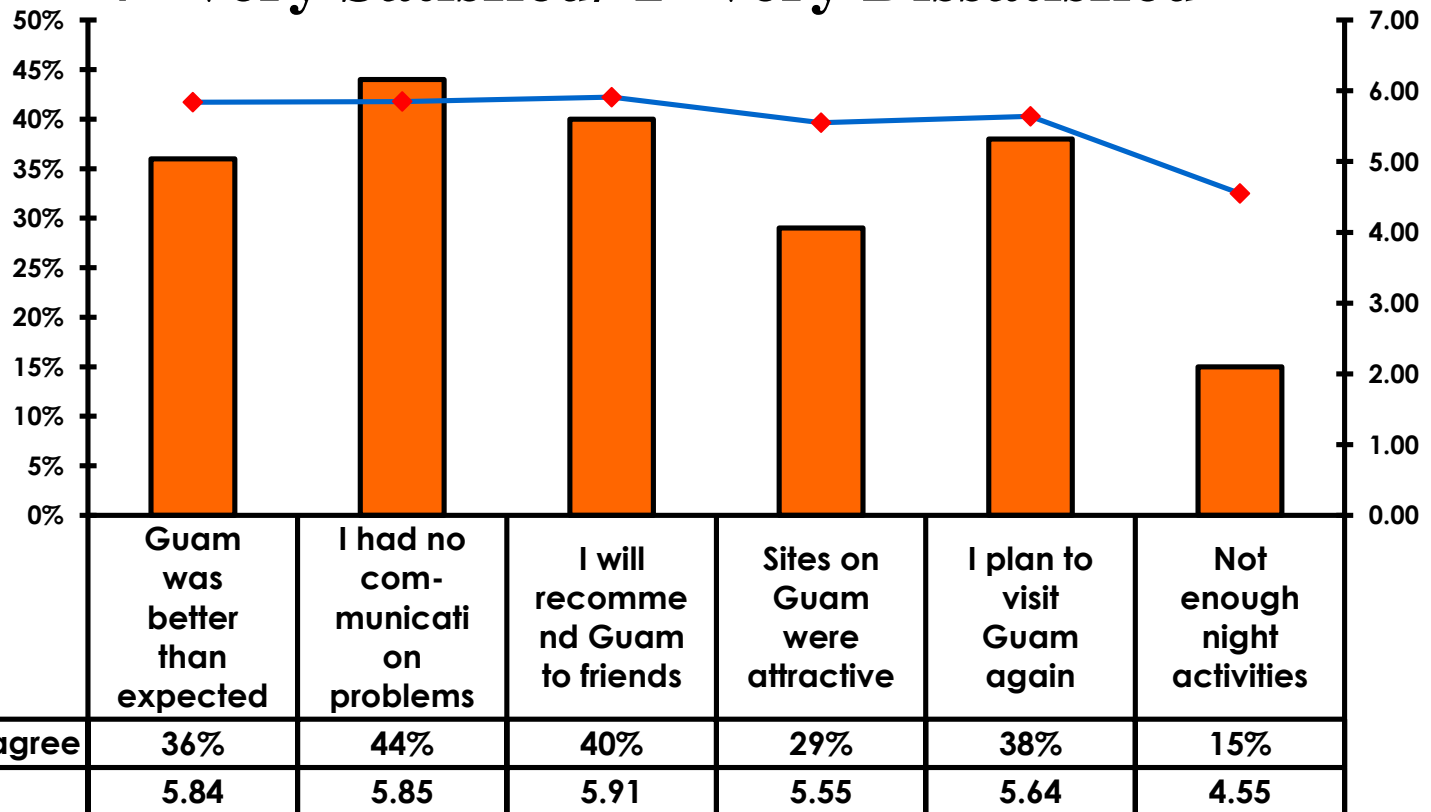
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

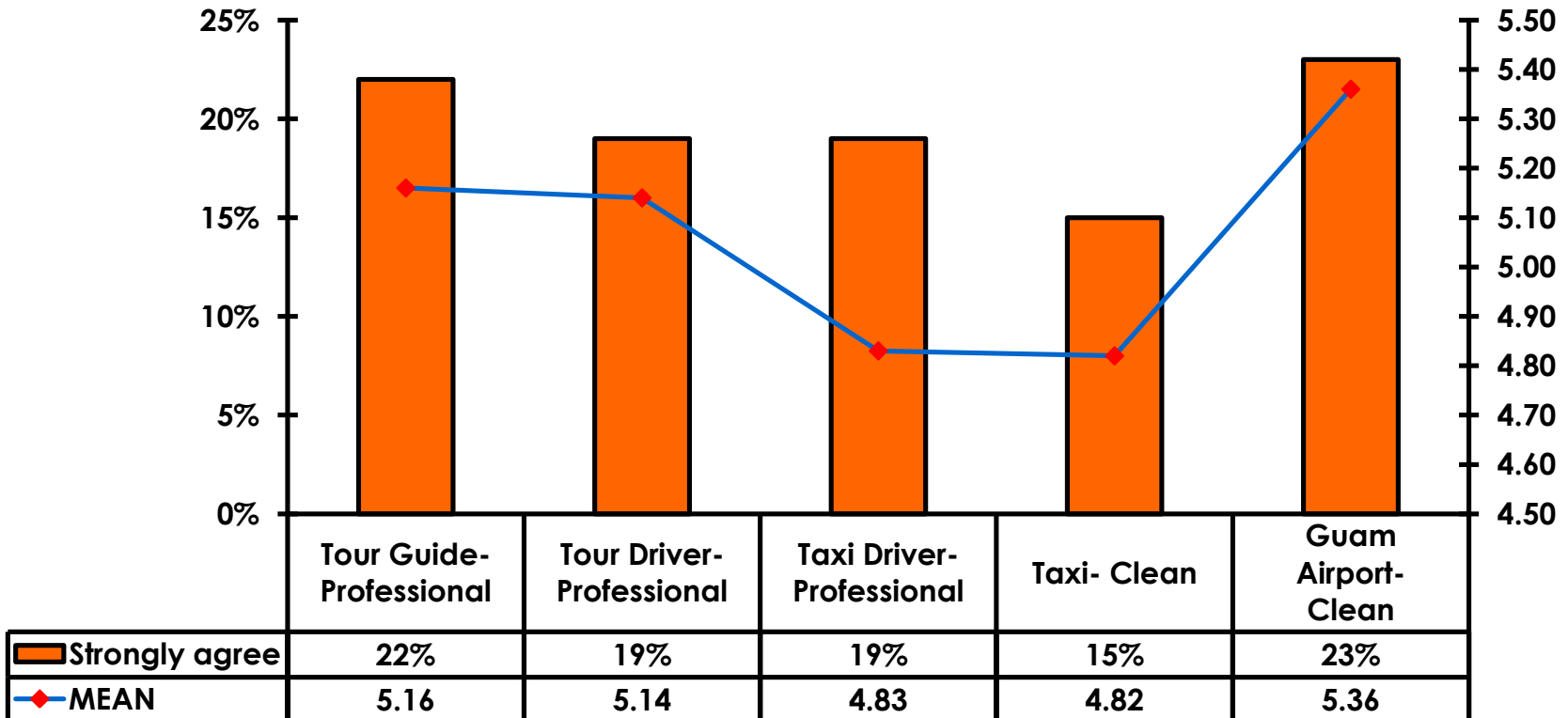
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

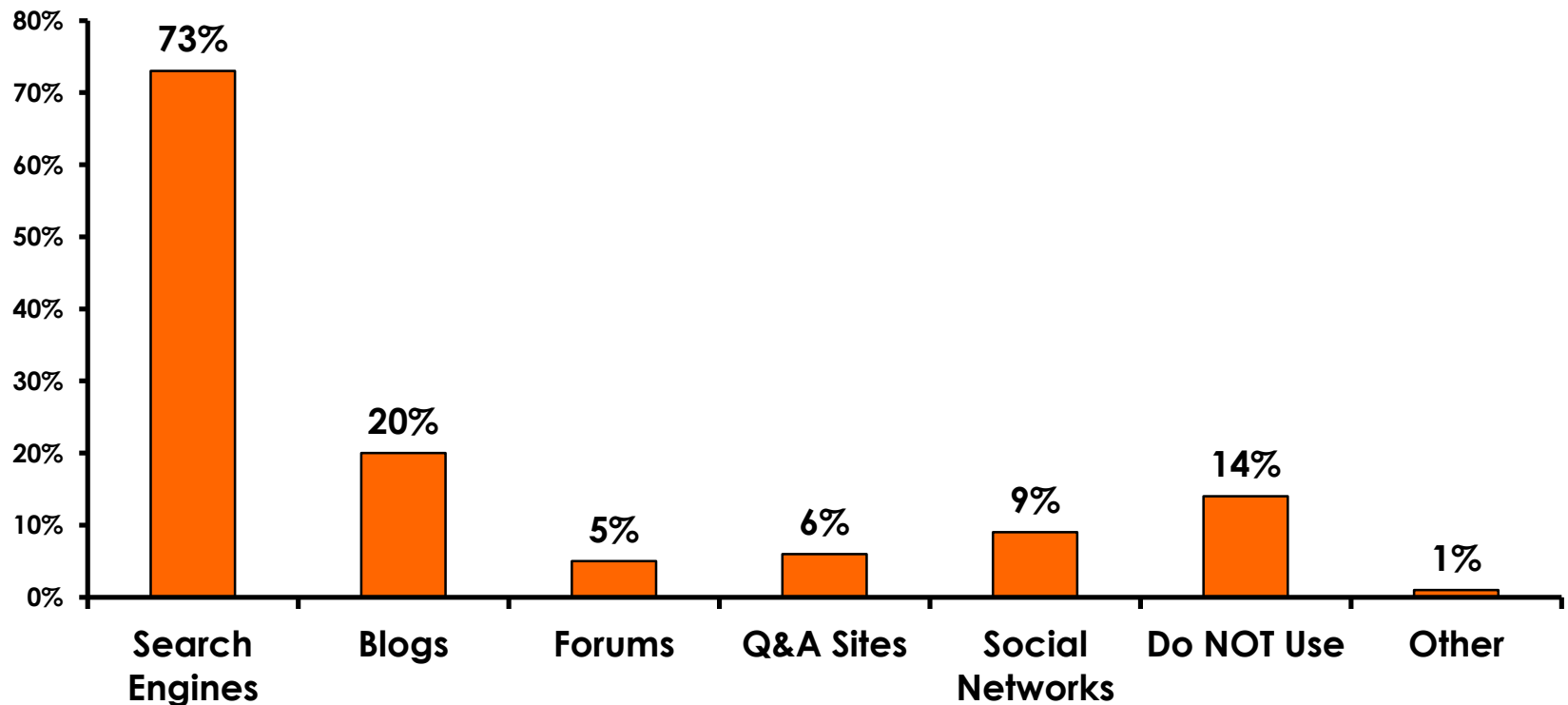
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



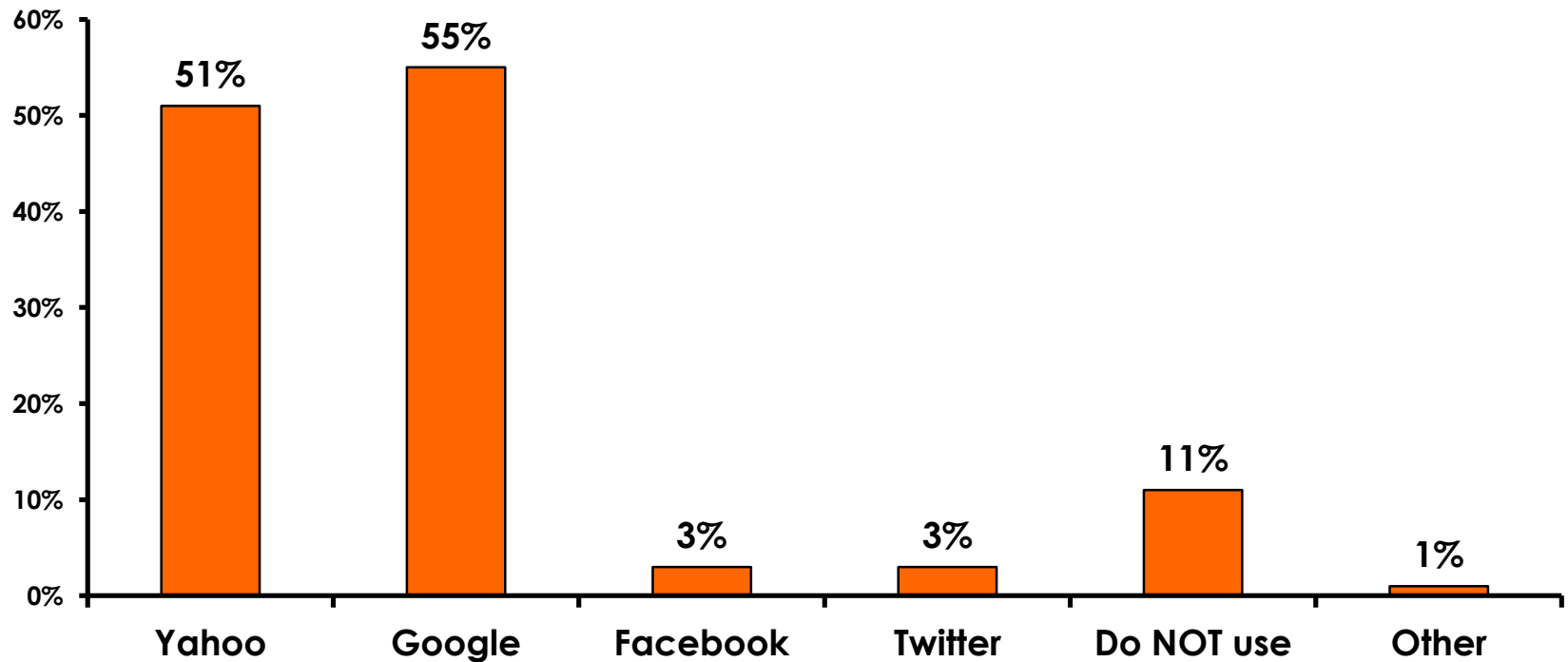
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

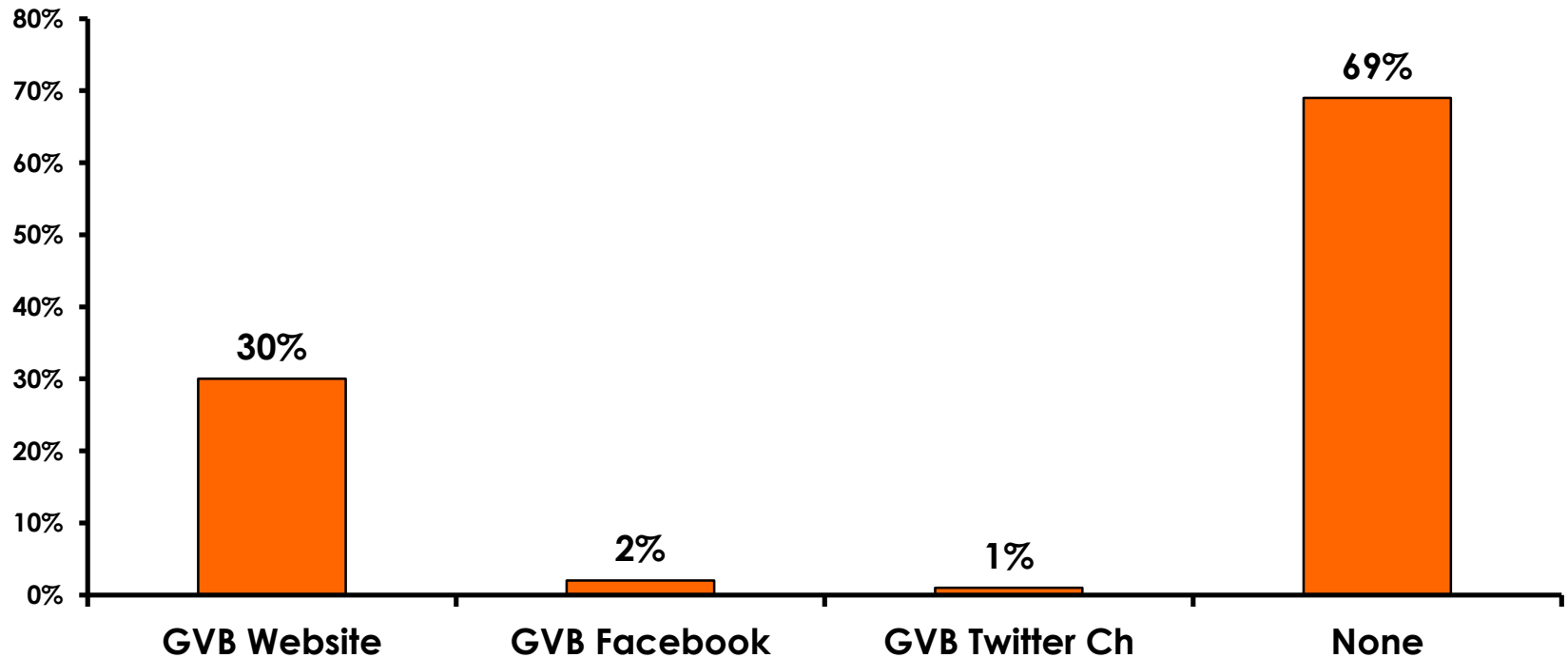


Internet- Things To Do

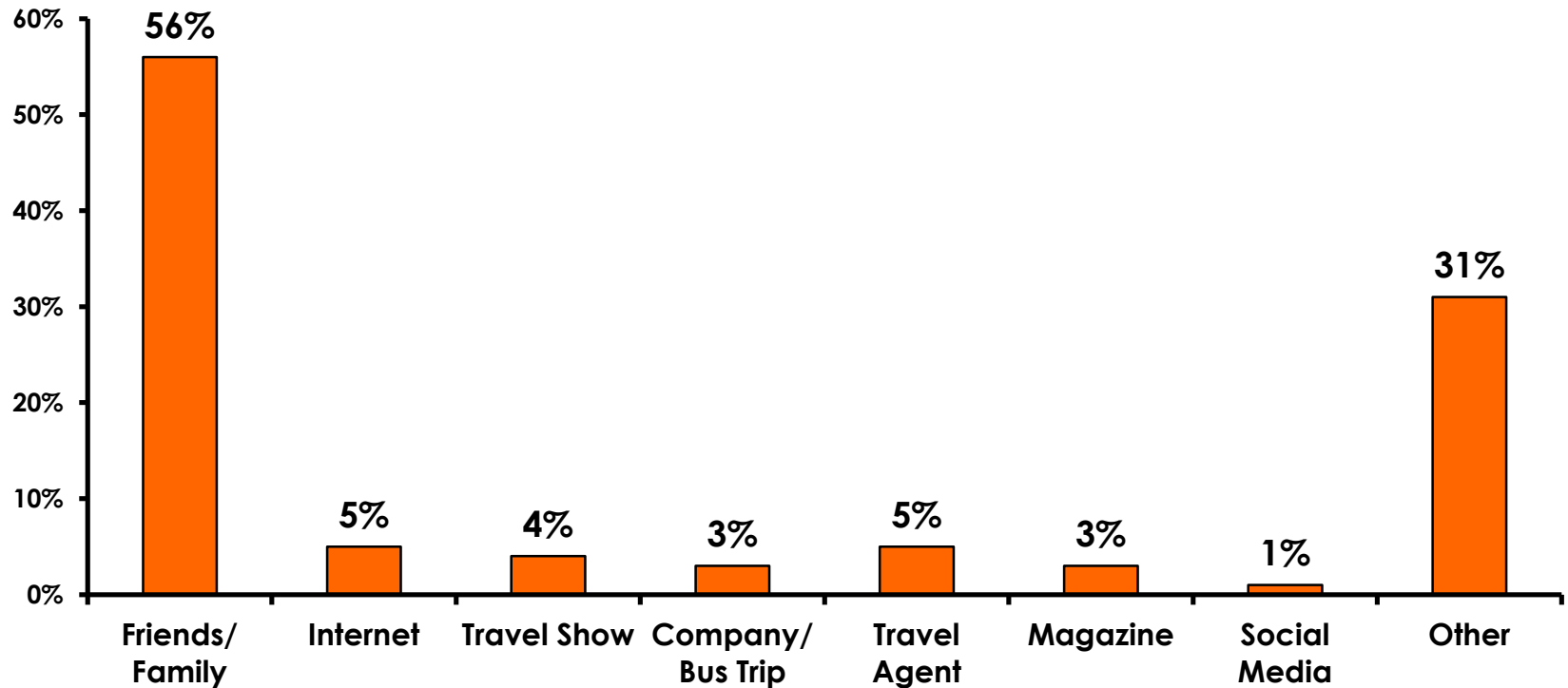
Sources of Info



Internet- GVB Sources

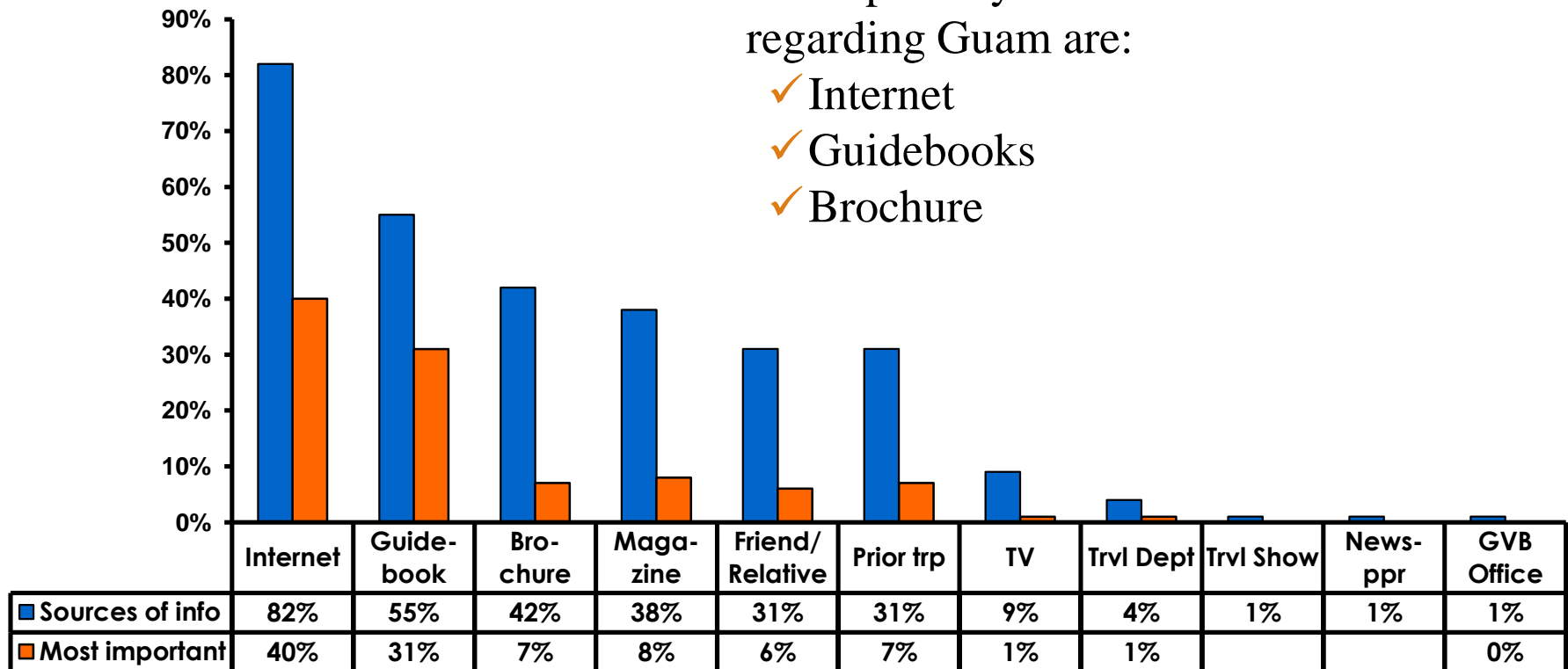


Travel Motivation- Info Sources



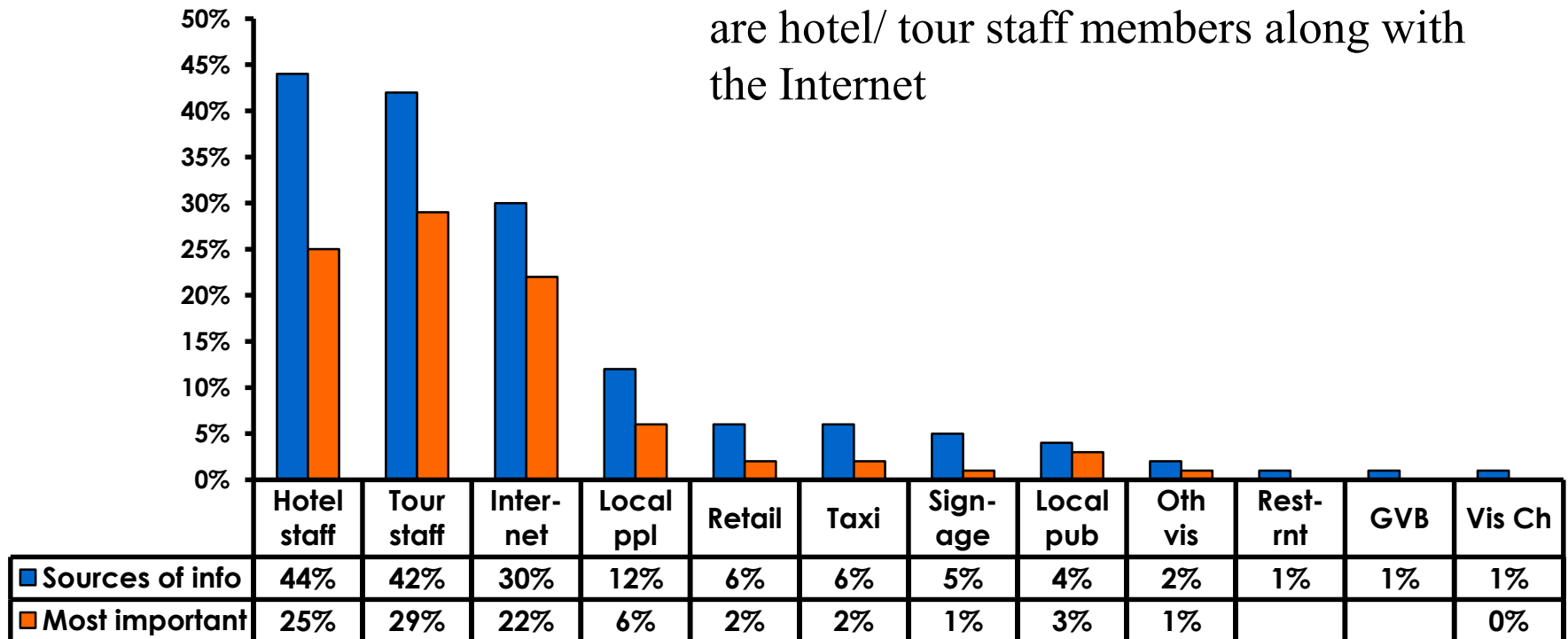
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

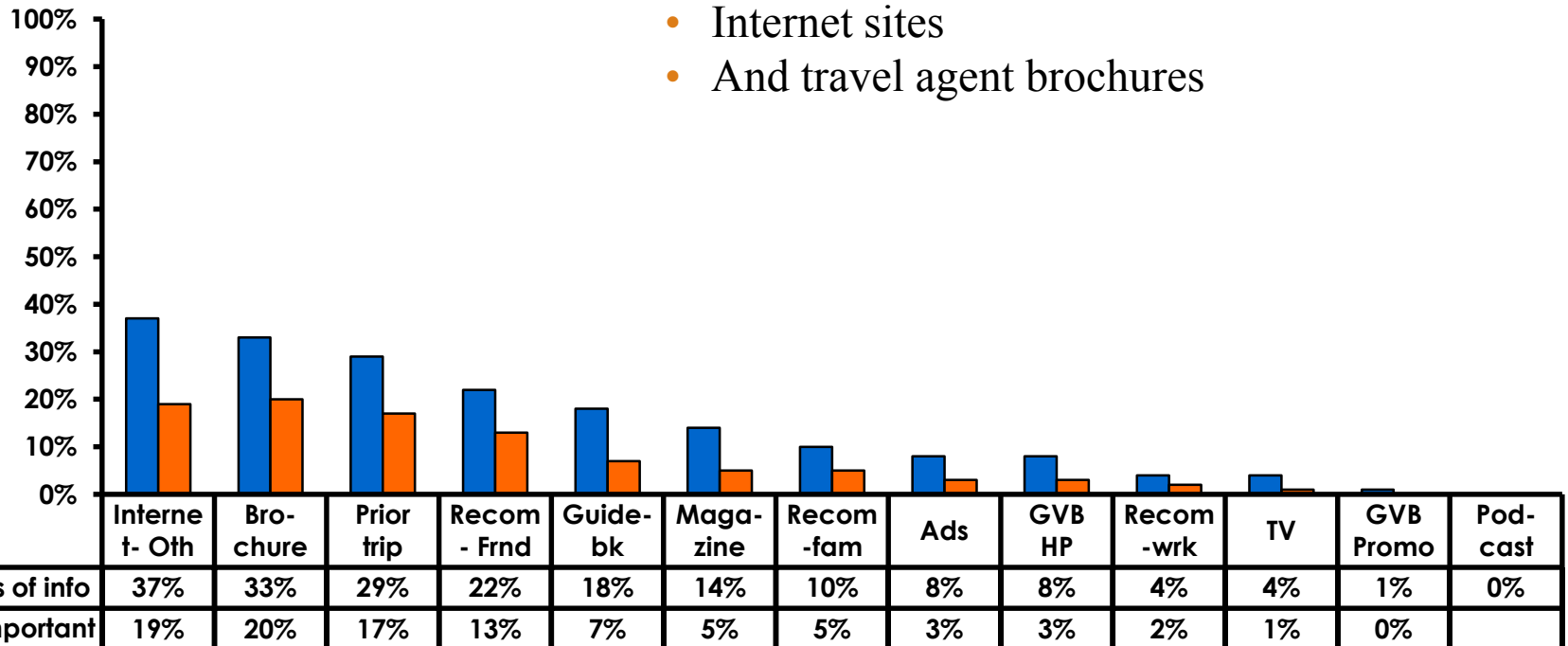
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

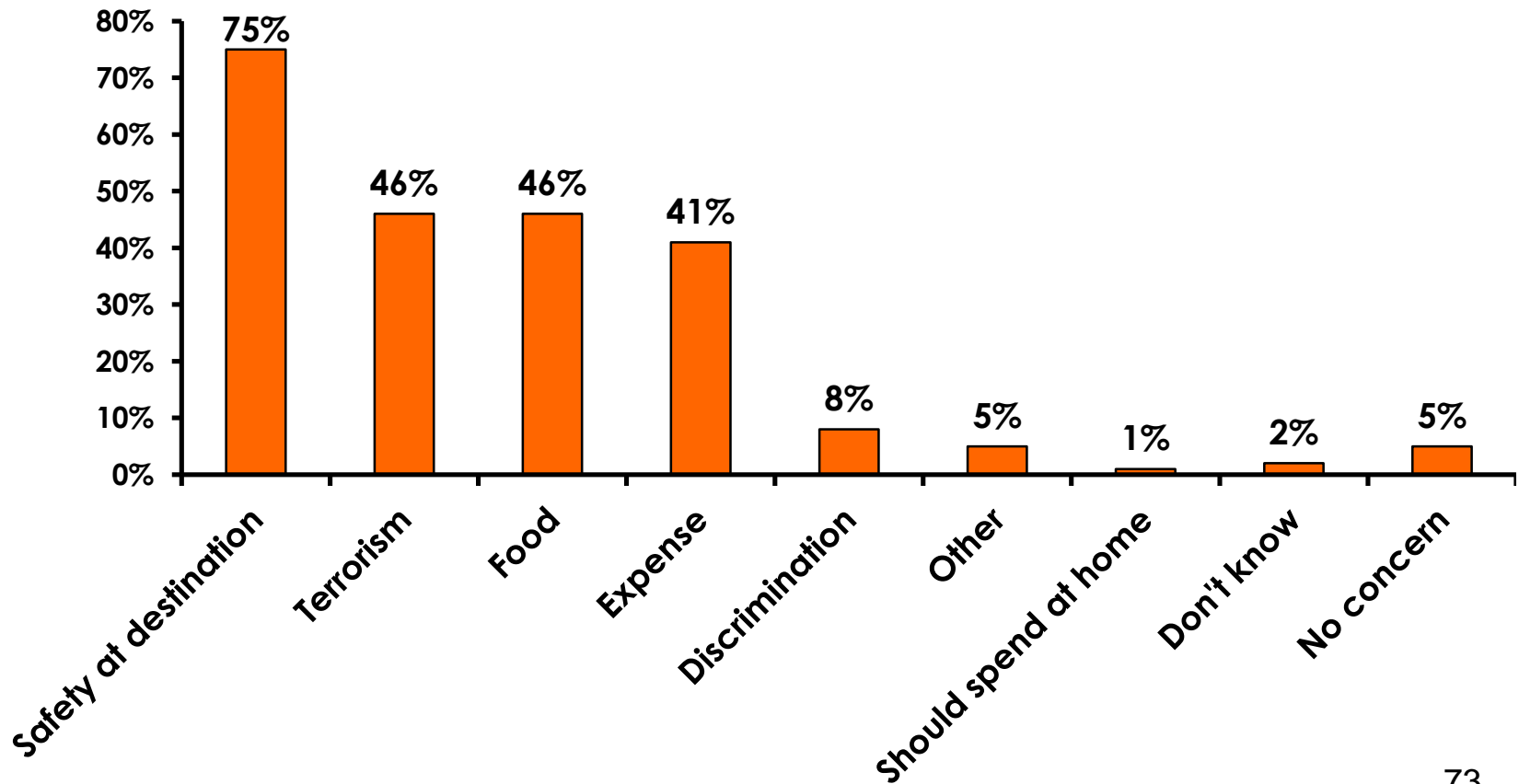
The primary motivational sources of information were.

- Prior trip to Guam,
- Internet sites
- And travel agent brochures



SECTION 6 **OTHER ISSUES**

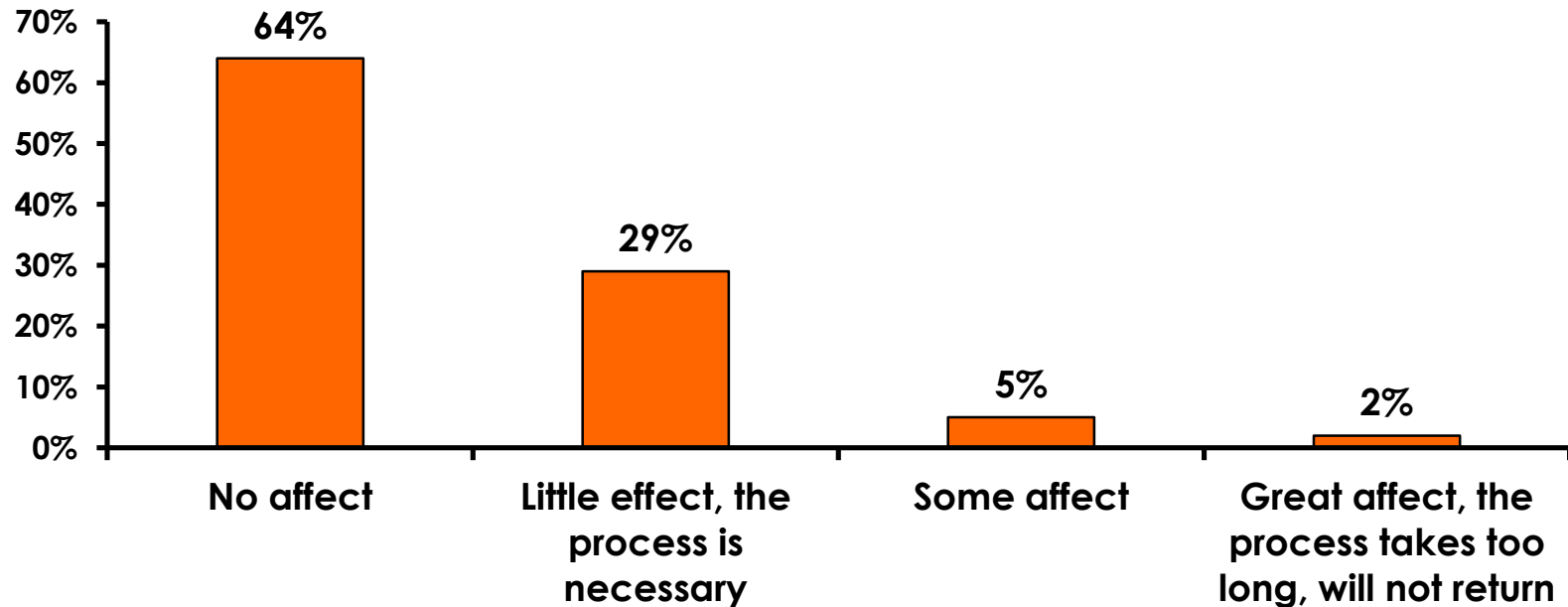
Concerns about travel outside of Japan - Overall



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	75%	78%	73%	74%	71%	71%	70%	90%	64%	78%	71%	80%	76%	
	Terrorism	46%	48%	41%	45%	61%	41%	37%	46%	46%	41%	40%	56%	71%	
	Food	46%	44%	50%	43%	43%	41%	43%	46%	46%	53%	50%	41%	35%	
	Expense	41%	49%	40%	31%	29%	29%	43%	41%	42%	41%	40%	44%	35%	
	Discrimination against Japanese	8%	9%	8%	6%	4%	6%	10%	8%	10%	9%	6%	9%		
	No concerns	5%	4%	10%	3%	4%	12%	7%		10%	7%	8%	2%		
	Other	5%	4%	5%	9%	4%		3%	5%	4%	7%	13%	4%		
	Don't know	2%	2%	3%		7%	6%	3%			2%	2%		6%	
	Should spend at home	1%	1%	2%	2%					2%	2%	2%		6%	
	Total	Count	349	142	111	65	28	17	30	39	50	58	48	54	17

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

