

GUAM VISITORS BUREAU Japan Visitor Tracker Exit Profile FY2015 NOVEMBER 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

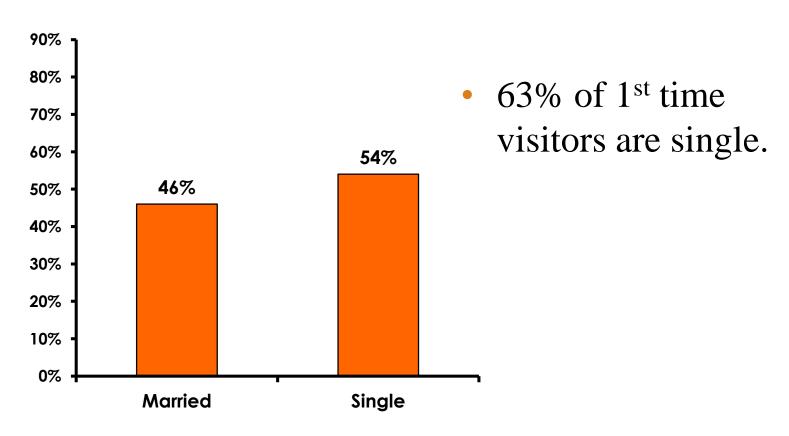
- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction,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



SECTION 1 PROFILE OF RESPONDENTS

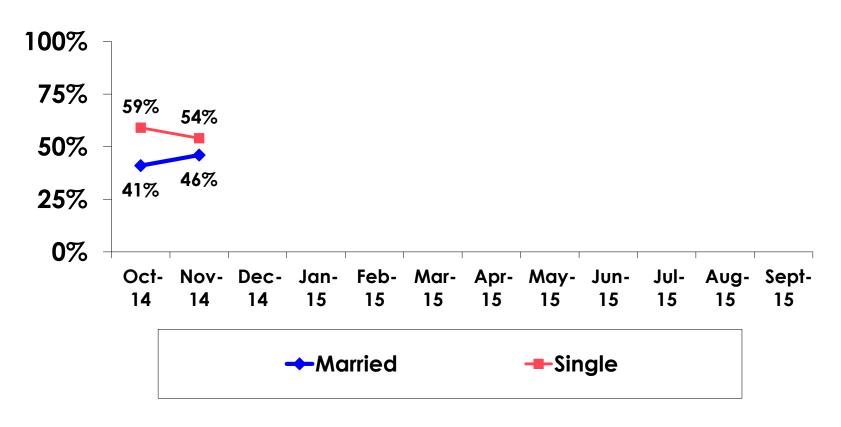


Marital Status - Overall



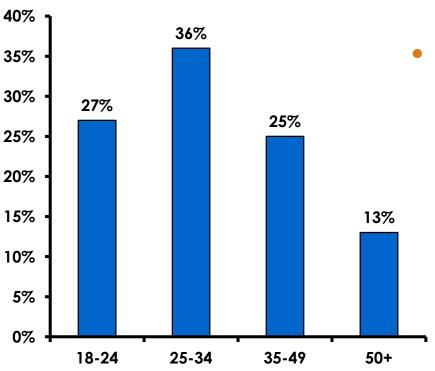


MARITAL STATUS





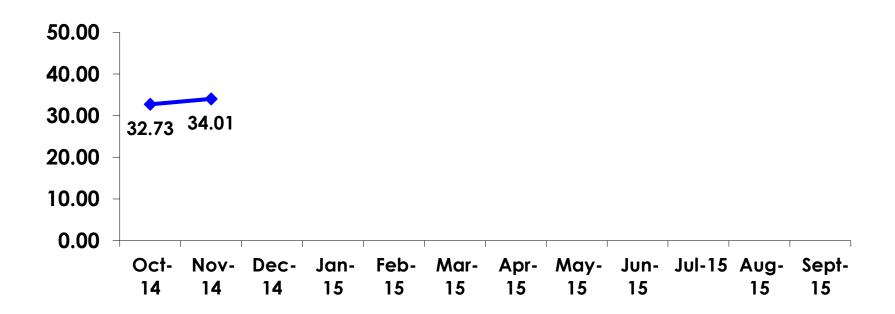
Age - Overall



The average age of the respondents is 34.01 years of age.

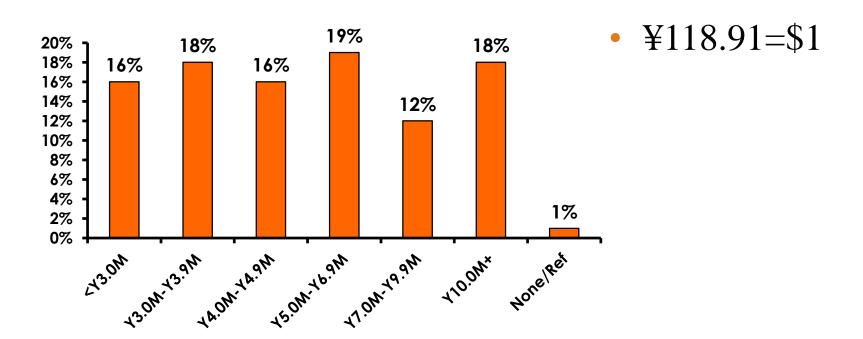


AVERAGE - AGE



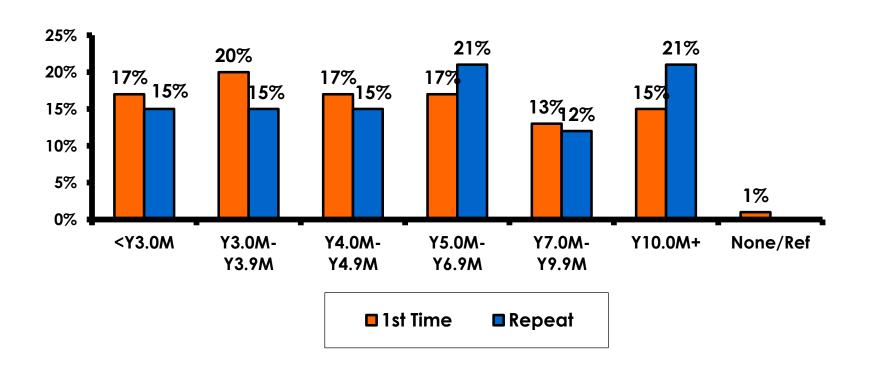


Personal Income





Personal Income – 1st time vs. repeat



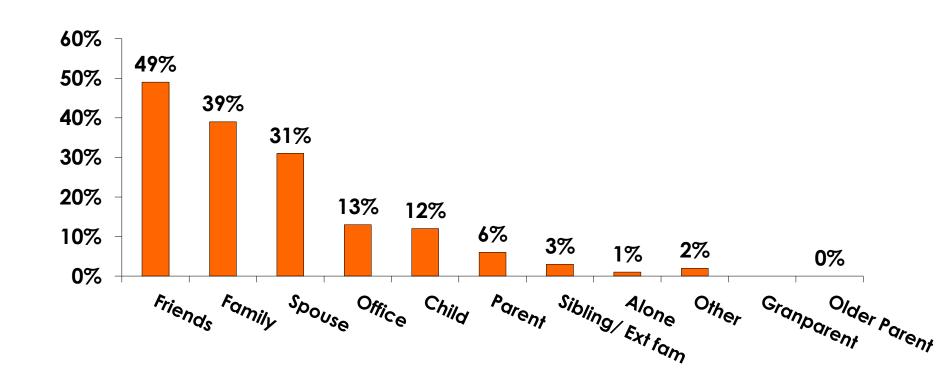


Personal Income by Gender & Age

			TOTAL	GEN	DER		AG	E	
			1	Male	Female	18-24	25-34	35-49	50+
Q26	<y2.0 million<="" td=""><td>Count</td><td>13</td><td>6</td><td>7</td><td>6</td><td>5</td><td>1</td><td>1</td></y2.0>	Count	13	6	7	6	5	1	1
		Column N %	4%	4%	5%	10%	5%	1%	2%
	Y2.0M-Y3.0M	Count	35	14	21	14	11	7	3
		Column N %	12%	9%	16%	24%	10%	8%	7%
	Y3.0M-Y4.0M	Count	53	30	23	2	38	6	7
		Column N %	18%	19%	17%	3%	35%	7%	17%
	Y4.0M-Y5.0M	Count	48	27	21	8	20	14	6
		Column N %	16%	17%	16%	14%	18%	17%	14%
	Y5.0M-Y7.0M	Count	55	34	21	6	13	25	10
		Column N %	19%	21%	16%	10%	12%	30%	24%
	Y7.0M-Y10.0M	Count	36	17	19	11	7	11	7
		Column N %	12%	11%	14%	19%	6%	13%	17%
	Y10.0M+	Count	53	32	21	10	15	19	8
		Column N %	18%	20%	16%	17%	14%	23%	19%
	No Income	Count	2		2	2			
		Column N %	1%		1%	3%			
	Total	Count	295	160	135	59	109	83	42



Travel Companions

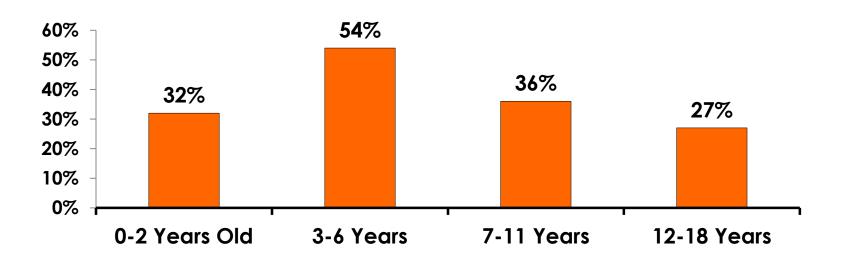




Number of Children Travel Party

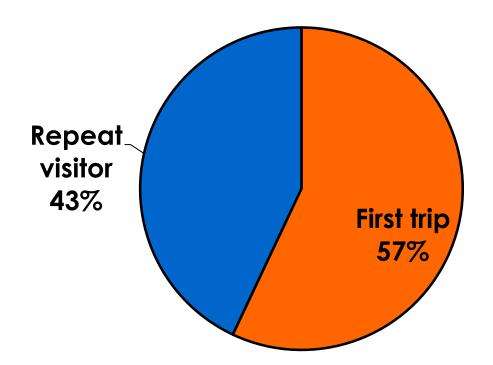
N=41 total respondents traveling with children.

(Of those N=41 respondents, there is a total of 69 children 18 years or younger)



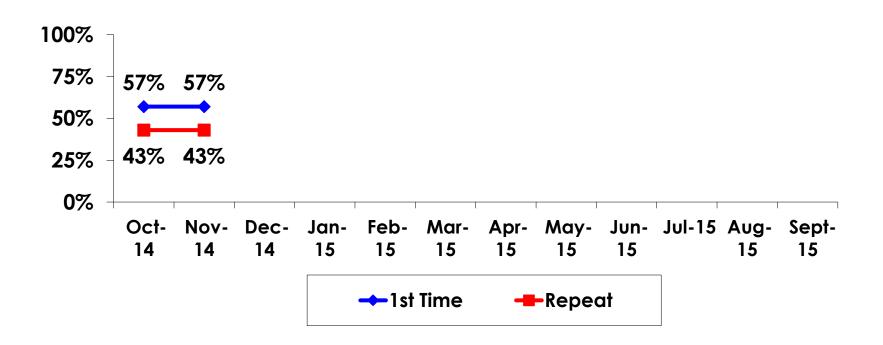


Prior Trips to Guam





PRIOR TRIPS TO GUAM





Trips to Guam by Age & Gender

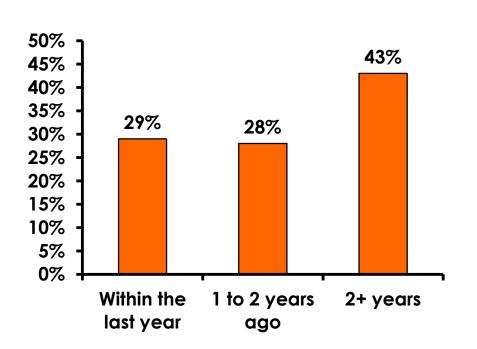
			TOTAL	TRIPS T	O GUAM
			1	1st	Repeat
GENDER	Male	Count	174	91	82
		Column N %	50%	46%	54%
	Female	Count	176	107	69
		Column N %	50%	54%	46%
	Total	Count	350	198	151
AGE	18-24	Count	93	72	21
		Column N %	27%	37%	14%
	25-34	Count	124	78	45
		Column N %	36%	40%	30%
	35-49	Count	87	29	58
		Column N %	25%	15%	39%
	50+	Count	44	18	26
		Column N %	13%	9%	17%
	Total	Count	348	197	150

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



Repeat Visitors Last Trip

n = 148

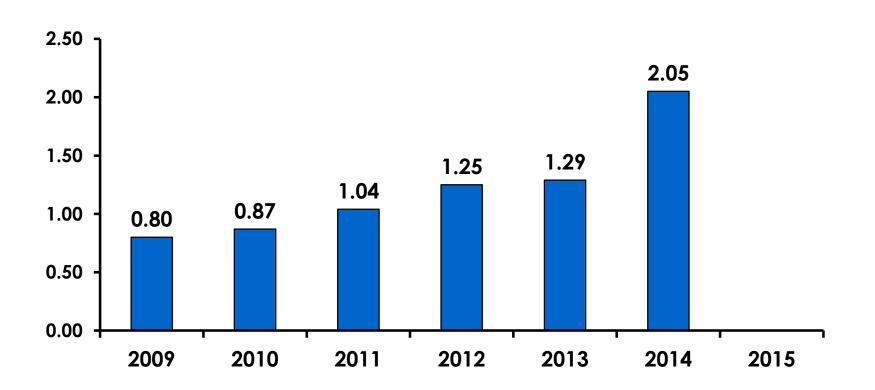


- The average repeat visitor has been to Guam 3.63 times.
- A majority of repeat visitors have been to Guam within the last 2 years.



Average Number Overnight Trips

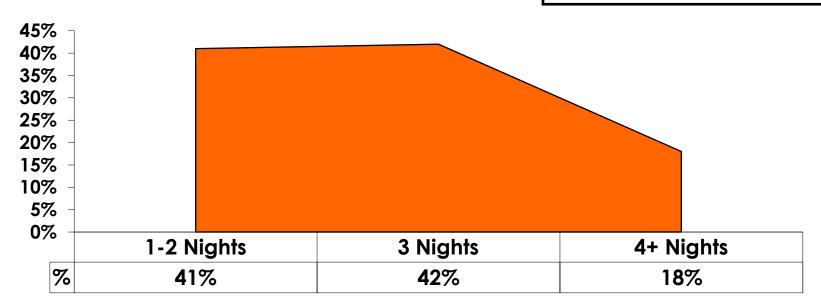
(2009-2015) (2 nights or more)





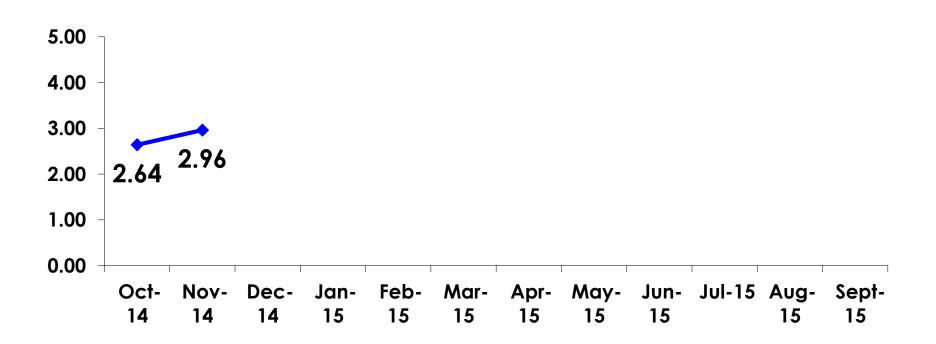
Length of Stay

Mean = 2.96 Days Median = 3.0 Days





AVG LENGTH OF STAY





Occupation by Income

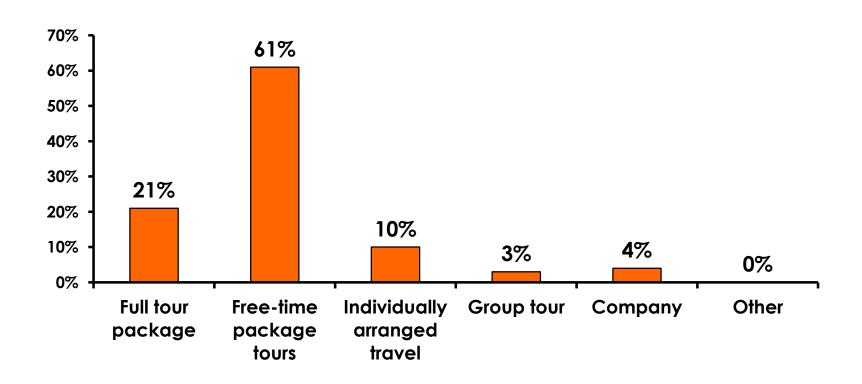
			TOTAL				Q26				
			-	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q25	Office worker non-mgr		18%	31%	21%	32%	19%	9%	17%	11%	
	Student		17%	15%	15%	4%	13%	9%	25%	13%	100%
	Engineer		12%		9%	13%	15%	16%	11%	9%	
	Salesperson		8%	8%	3%	8%	17%	16%	6%	4%	
	Self-employed		7%		6%	8%	6%	7%	3%	17%	
	Homemaker		6%		3%	6%	4%	5%	14%	13%	
	Manager		5%		3%	4%	2%	11%	3%	11%	
	Other		4%	23%	9%		2%	4%	6%		
	Professional/ Specialist		4%			9%	4%	2%		9%	
	Skilled worker		4%	8%	9%		2%	2%	3%	2%	
	Govt- office worker non- mgr		4%			9%	6%	2%	3%	4%	
	Unemployed		3%		3%	2%	6%	5%			
	Freeter		2%	8%	15%	2%	2%				
	Govt- Manager		2%			2%	2%	5%	3%		
	Teacher		1%	8%	3%			4%			
	Executive (30+ employees)		1%						6%	4%	
	Free-lancer		1%					2%	3%	2%	
	Retired		1%		3%	2%					
	Total	Count	339	13	34	53	48	55	36	53	2



SECTION 2 TRAVEL PLANNING



Travel Planning - Overall





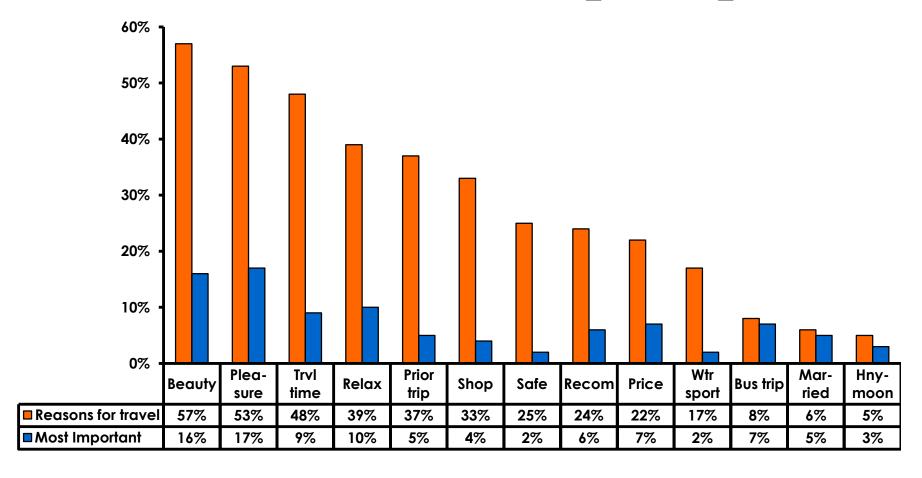
Accommodation by Income

Average length of stay: 2.96 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		23%	8%	21%	23%	23%	27%	22%	17%	50%	
	Grand Plaza Hotel		12%	15%	24%	6%	19%	9%	3%	8%	50%	
	Outrigger Guam Resort		12%		9%	15%	15%	5%	17%	19%		
	Royal Orchid Guam		11%		9%	13%	10%	9%	8%	8%		
	Guam Reef & Olive Spa		6%	31%	6%	8%	13%	4%		4%		
	Holiday Resort Guam		5%	15%	3%	2%	2%	5%	8%	9%		
	Hilton Guam Resort		4%		6%	4%	6%	5%	11%			
	Hotel Nikko Guam		4%	15%	6%	9%		2%		4%		
	Fiesta Resort Guam		4%		3%	4%	2%	7%	3%	4%		
	PIC Club		4%		3%	4%		9%	3%	6%		
	Westin Resort Guam		3%			2%	2%	2%	3%	8%		
	Onward Beach Resort		3%		3%	4%			8%	4%		
	Sheraton Laguna Guam		2%			2%		11%	3%			
	Leo Palace Resort		2%			2%		2%	3%	6%		
	Oceanview Hotel		1%	15%	3%					2%		
	Hyatt Regency Guam		1%				4%		3%	2%		
	Pacific Bay Hotel		1%		3%	2%			3%			
	Bayview Hotel		1%			2%			3%			
	Lotte Hotel Guam		1%				2%			2%		
	Other		0%		3%							
	Condo		0%				2%					
	Pacific Star Resort & Spa		0%					2%				
	Total	Count	349	13	34	53	48	55	36	53	2	



Travel Motivation - Top Responses





Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure,
- Relaxing
 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		57%	62%	59%	54%	45%	49%	64%
	Pleasure		53%	62%	51%	48%	48%	49%	56%
	Short travel time		48%	35%	51%	53%	55%	45%	50%
	Relax		39%	31%	40%	45%	41%	39%	39%
	Previous trip		37%	19%	31%	55%	59%	40%	35%
	Shopping		33%	39%	31%	30%	34%	27%	39%
	Safe		25%	17%	24%	29%	36%	28%	22%
	Recomm- friend/family/trvl agnt		24%	34%	27%	13%	14%	20%	28%
	Price		22%	29%	26%	14%	16%	19%	26%
	Water sports		17%	28%	16%	13%	5%	13%	20%
	Company/ Business Trip		8%	8%	10%	7%	5%	11%	6%
	Married/ Attn wedding		6%	2%	5%	3%	18%	6%	6%
	Honeymoon		5%	2%	6%	8%		7%	2%
	Golf		5%	1%	2%	5%	20%	8%	2%
	Other		4%	2%	2%	9%		5%	2%
	Scuba		4%	4%	4%	5%		4%	3%
	Organized sports		2%	1%	2%	1%	2%	1%	3%
	Visit friends/ Relatives		2%		3%		2%	2%	2%
	Company Sponsored		1%			2%	5%	1%	1%
	Career Cert/ Testing		1%		1%			1%	1%
	Total	Count	350	93	124	87	44	174	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		57%	23%	54%	55%	56%	64%	61%	55%	100%
	Pleasure		53%	31%	46%	53%	52%	53%	64%	60%	100%
	Short travel time		48%	23%	34%	47%	56%	53%	56%	66%	
	Relax		39%	23%	29%	40%	38%	38%	47%	58%	
	Previous trip		37%	31%	29%	36%	40%	49%	44%	45%	
	Shopping		33%	46%	29%	26%	35%	33%	33%	40%	50%
	Safe		25%		20%	19%	27%	29%	39%	28%	
	Recomm- friend/family/trvl agnt		24%		29%	28%	21%	16%	17%	17%	100%
	Price		22%	8%	14%	21%	31%	31%	19%	19%	
	Water sports		17%	8%	14%	15%	21%	15%	17%	15%	50%
	Company/ Business Trip		8%	46%	11%	17%	2%	5%		6%	
	Married/ Attn wedding		6%		6%	4%	4%	9%	8%	8%	
	Honeymoon		5%		3%	6%	13%	5%		4%	
	Golf		5%	15%	3%	2%	8%	9%	3%	4%	
	Other		4%			6%		5%	3%	8%	
	Scuba		4%		3%	4%	4%	5%	3%		
	Organized sports		2%		3%			4%	3%	2%	
	Visit friends/ Relatives		2%	8%		6%	2%	2%			
	Company Sponsored		1%			2%		4%	3%		
	Career Cert/ Testing		1%			2%		2%			
	Total	Count	350	13	35	53	48	55	36	53	2



SECTION 3 EXPENDITURES

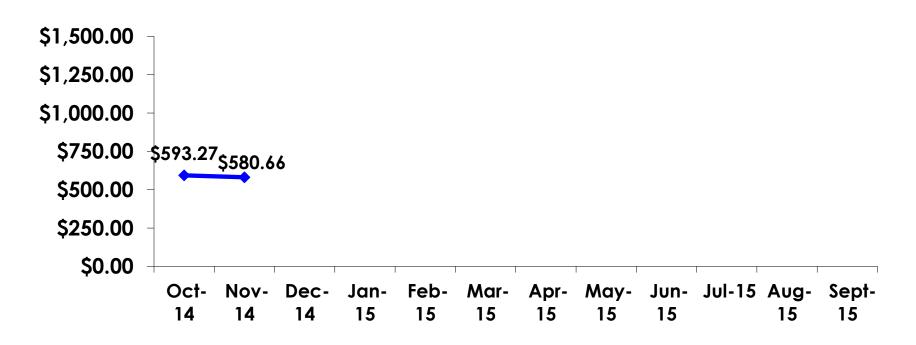


Prepaid Expenditures ¥118.91/US\$1

- \$1,020.79 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$10,512 = maximum (highest amount recorded for the entire sample)
- \$580.66 = overall mean average <u>per person</u> prepaid expenditures



PREPAID EXPENDITURES Per Person



YTD=\$586.96



Breakdown of Prepaid Expenditures ¥115.78=\$1

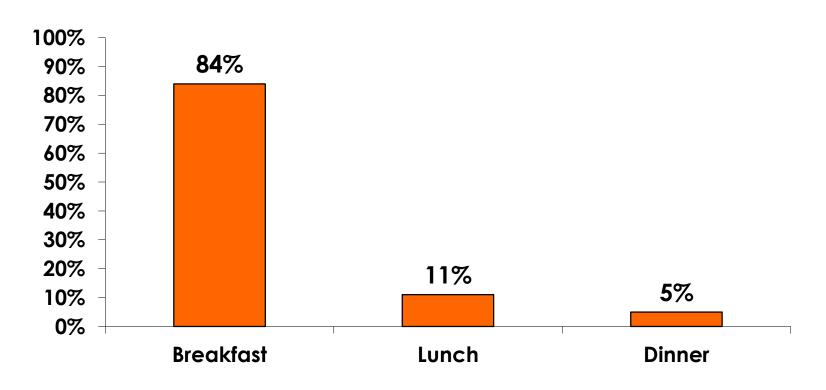
(Filter: Only those who responded/ Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,158.95
Air & Accommodation w/ daily meal package	\$2,791.53
Air only	\$988.25
Accommodation only	\$383.02
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$23.55
Ground transportation – Japan	\$51.32
Ground transportation – Guam	\$30.84
Optional tours/ activities	\$204.50
Other expenses	\$205.44
Total Prepaid	\$1,020.79



PREPAID MEAL BREAKDOWN

Air/Accommodations with Daily Meal Pkg. n=19

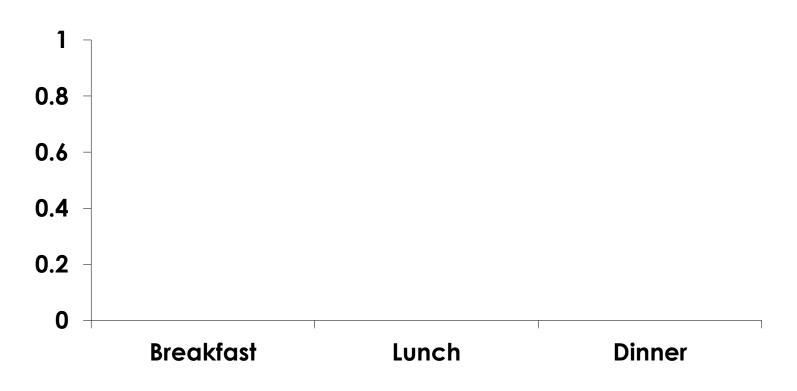


Mean=\$2,791.53 per travel party



PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg. N=X

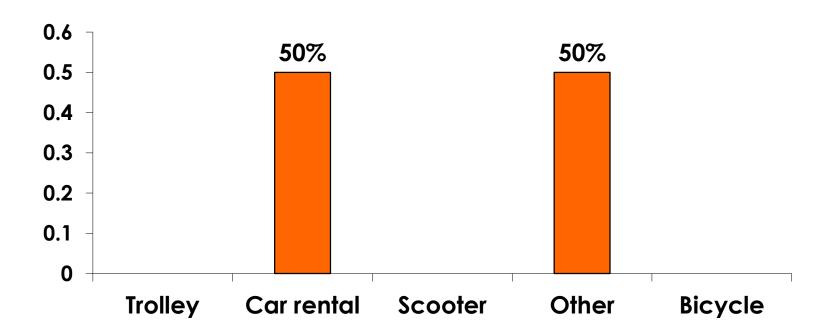


Mean=\$XX per travel party



PREPAID GROUND TRANSPORTATION

n=2



Mean=\$30.84 per travel party

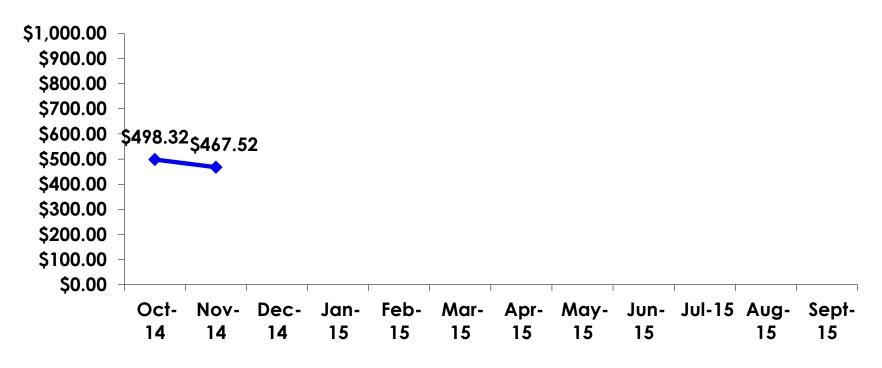


On-Island Expenditures

- \$712.70 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,000 = Maximum (highest amount recorded for the entire sample)
- \$467.52 = overall mean average <u>per person</u> onisland expenditure



ON-ISLAND EXPENDITURES Per Person

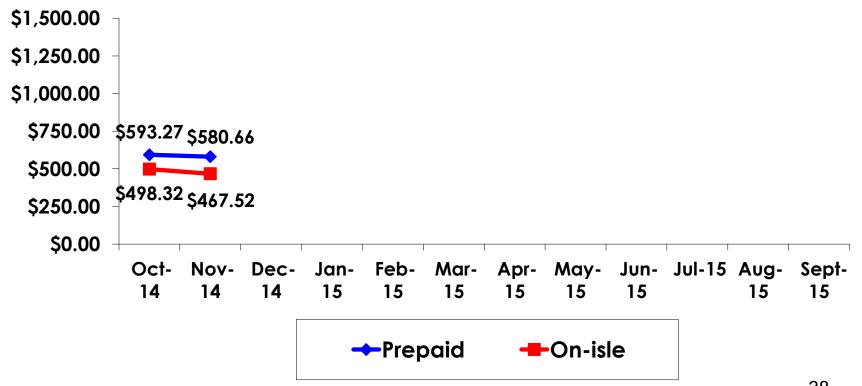


YTD = \$482.92



PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$586.96 On-Isle YTD = \$482.92





Total On-Island Expenditure by Gender & Age

	GENDER											
						Ma	ile		Female			
						AG	Ε		AGE			
	- Male Female				18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$467.52	\$477.73	\$457.43	\$374.32	\$416.33	\$565.07	\$577.28	\$413.84	\$502.04	\$407.02	\$562.29
	Median	\$333	\$378	\$300	\$315	\$400	\$317	\$500	\$300	\$350	\$250	\$425
	Minimum	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$0	\$0	\$0	\$117
	Maximum	\$5,000	\$5,000	\$4,000	\$1,000	\$1,000	\$5,000	\$2,000	\$2,000	\$4,000	\$1,700	\$2,850



On-Island Expenditure Categories by Gender & Age

		TOTAL	GEN	DER		A	ЗE	
		1	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$30.70	\$31.87	\$29.54	\$24.60	\$15.90	\$35.67	\$76.89
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$29.26	\$28.88	\$29.64	\$31.31	\$29.41	\$22.82	\$38.59
	Median	\$0	\$0	\$0	\$10	\$0	\$0	\$0
F&B RESTRNT	Mean	\$79.82	\$101.06	\$58.82	\$52.20	\$59.45	\$120.25	\$118.14
	Median	\$20	\$50	\$0	\$0	\$0	\$70	\$0
OPT TOUR	Mean	\$72.75	\$85.73	\$59.91	\$68.81	\$49.10	\$104.80	\$86.02
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$150.75	\$181.35	\$120.50	\$78.65	\$135.46	\$241.49	\$171.41
	Median	\$19	\$0	\$23	\$20	\$30	\$0	\$0
GIFT- OTHER	Mean	\$114.64	\$108.76	\$120.44	\$70.99	\$100.72	\$144.22	\$191.70
	Median	\$30	\$30	\$33	\$30	\$40	\$50	\$15
TRANS	Mean	\$16.21	\$19.04	\$13.41	\$15.96	\$10.27	\$16.13	\$33.68
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$217.95	\$249.56	\$186.70	\$183.41	\$229.70	\$183.75	\$335.41
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$50
TOTAL	Mean	\$712.70	\$806.67	\$619.80	\$523.04	\$628.96	\$880.39	\$1,043.55
	Median	\$500	\$550	\$404	\$330	\$500	\$700	\$700



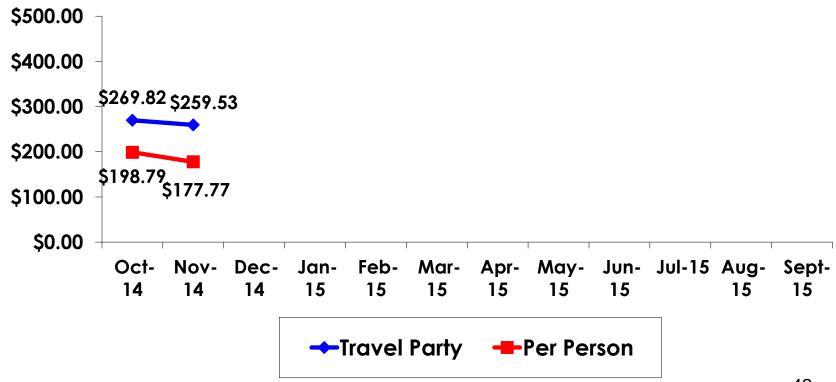
On-Island Expenditures First Timers & Repeaters

		TOTAL	TRIPS T	O GUAM
		1	1st	Repeat
F&B HOTEL	Mean	\$30.70	\$28.10	\$34.15
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$29.26	\$30.77	\$27.34
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$79.82	\$65.08	\$99.25
	Median	\$20	\$0	\$27
OPT TOUR	Mean	\$72.75	\$70.80	\$75.65
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$150.75	\$128.65	\$180.73
	Median	\$19	\$20	\$3
GIFT- OTHER	Mean	\$114.64	\$104.36	\$128.74
	Median	\$30	\$40	\$7
TRANS	Mean	\$16.21	\$13.40	\$20.00
	Median	\$0	\$0	\$0
OTHER	Mean	\$217.95	\$206.95	\$233.82
	Median	\$0	\$0	\$0
TOTAL	Mean	\$712.70	\$650.04	\$798.58
	Median	\$500	\$450	\$600



ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$264.68 Per Person YTD = \$188.29



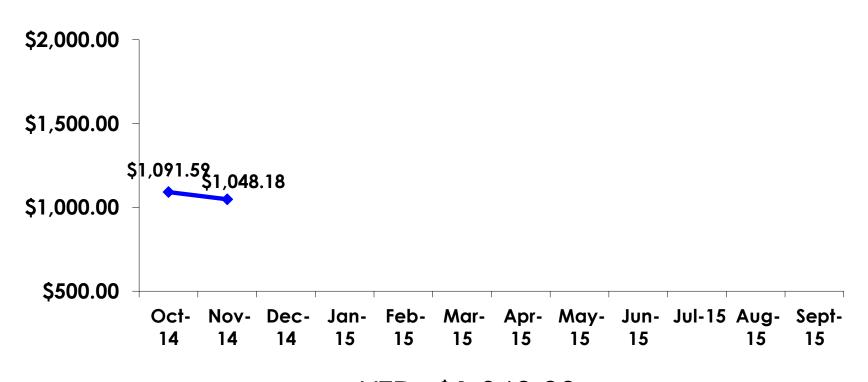


Total Expenditures Per Person (Prepaid & On-Island)

- \$1,048.18 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,332 = Maximum (highest amount recorded for the entire sample)



TOTAL EXPENDITURES Per Person



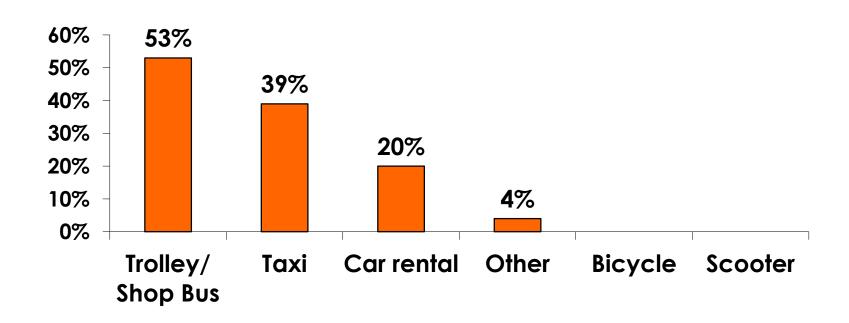


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$30.70
Food & beverage in fast food restaurant/convenience store	\$29.26
Food & beverage at restaurants or drinking establishments outside a hotel	\$79.82
Optional tours and activities	\$72.75
Gifts/ souvenirs for yourself/companions	\$150.75
Gifts/ souvenirs for friends/family at home	\$114.64
Local transportation	\$16.21
Other expenses not covered	\$217.95
Average Total	\$712.70



Local Transportation_{n=74}



Mean=\$16.21 per travel party



Guam Airport Expenditures

- \$31.84 = Mean
- \$10 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,000 = Maximum (highest amount recorded for the entire sample)



Breakdown of Airport Expenditures

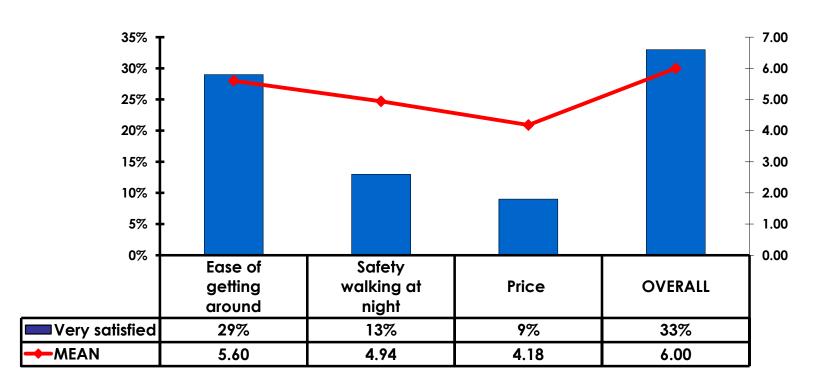
	MEAN \$
Food & Beverages	\$9.37
Gifts/Souvenirs Self	\$10.55
Gifts/Souvenirs Others	\$11.93
Total	\$31.84



SECTION 4 VISITOR SATISFACTION

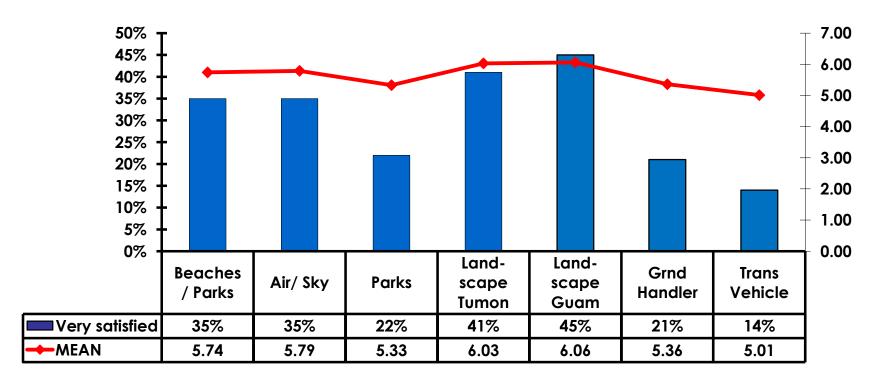


Satisfaction Scores Overall



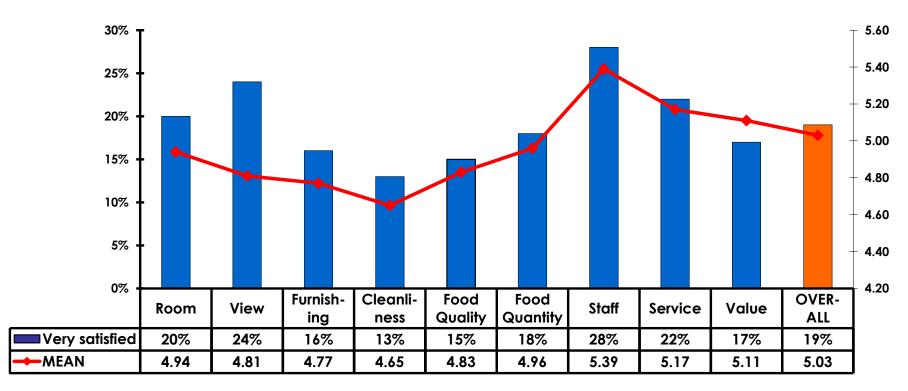


Satisfaction Quality/ Cleanliness



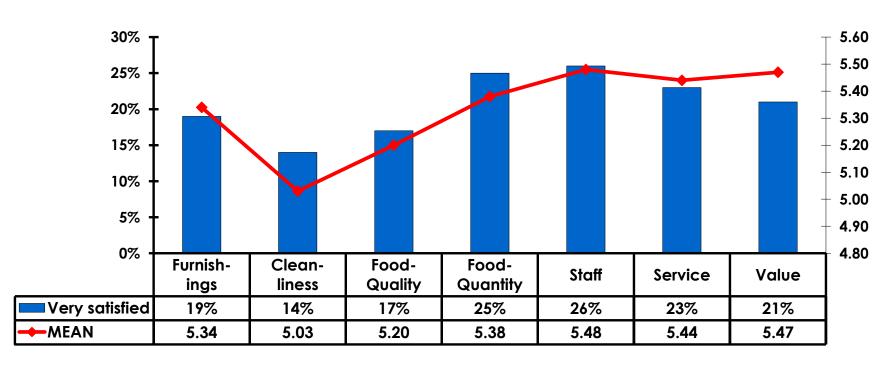


Quality of Accommodations



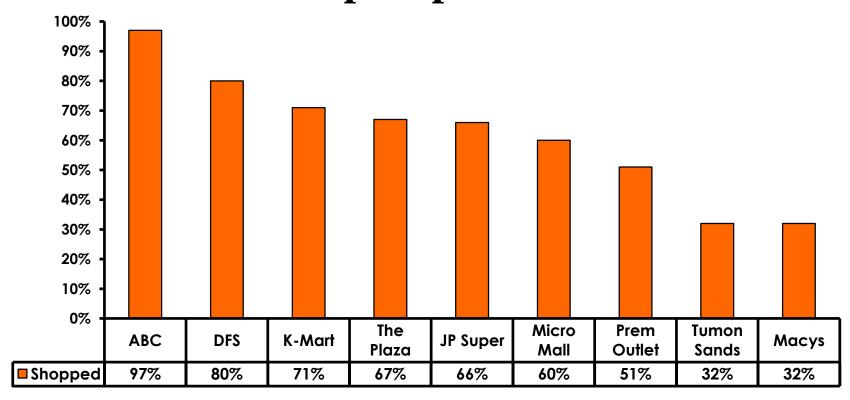


Quality of Dining Experience





Visits to Shopping Centers/Malls on Guam Top responses



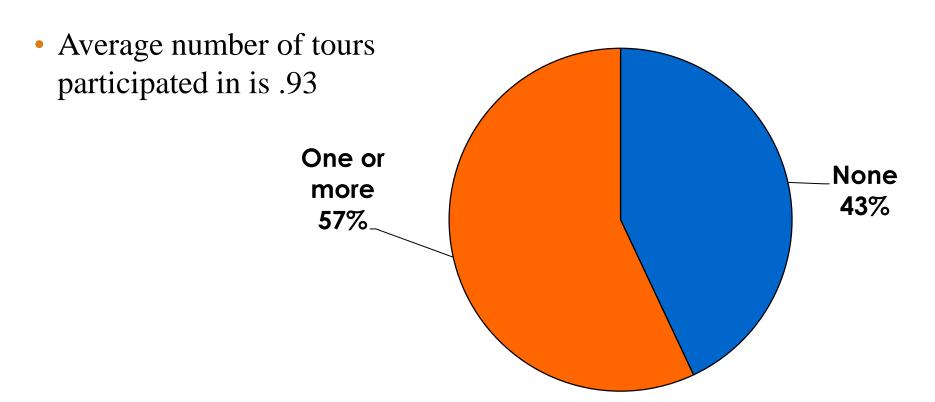


Satisfaction with Shopping

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 53 %	Score of 6 to 7 = 52 %
Score of 4 to 5 = 42%	Score of 4 to 5 = 40 %
Score 1 to 3 = 6 %	Score 1 to 3 = 9%
MEAN = 5.40	MEAN = 5.31

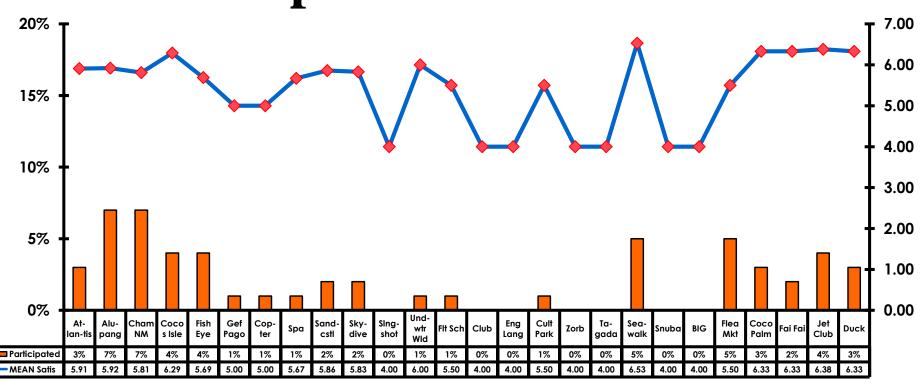


Optional Tour Participation





Optional Tours Participation & Satisfaction





Day Tours Satisfaction

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 58%	Score of 6 to 7 = 57 %
Score of 4 to 5 = 38%	Score of 4 to 5 = 39%
Score 1 to 3 = 3 %	Score 1 to 3 = 3 %
MEAN = 5.52	MEAN = 5.46

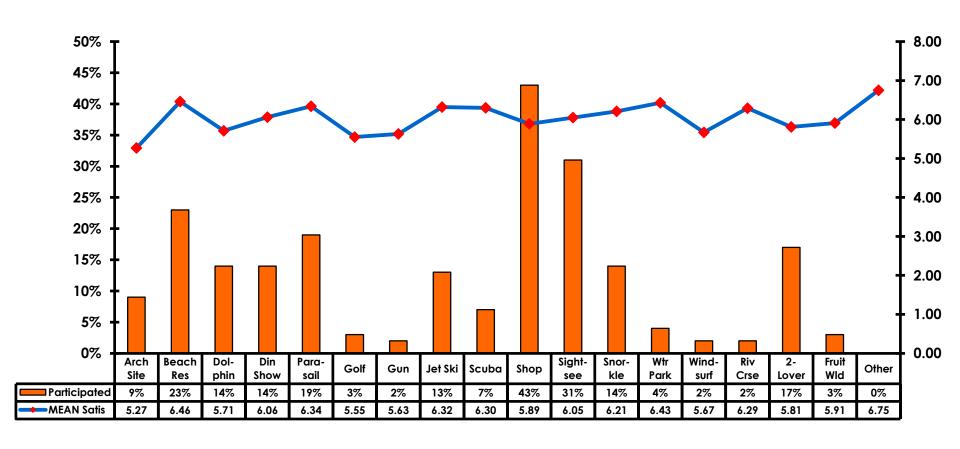


Night Tours Satisfaction

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 32%	Score of 6 to 7 = 32%
Score of 4 to 5 = 64%	Score of 4 to 5 = 64%
Score 1 to 3 = 4%	Score 1 to 3 = 4 %
MEAN = 4.81	MEAN = 4.80

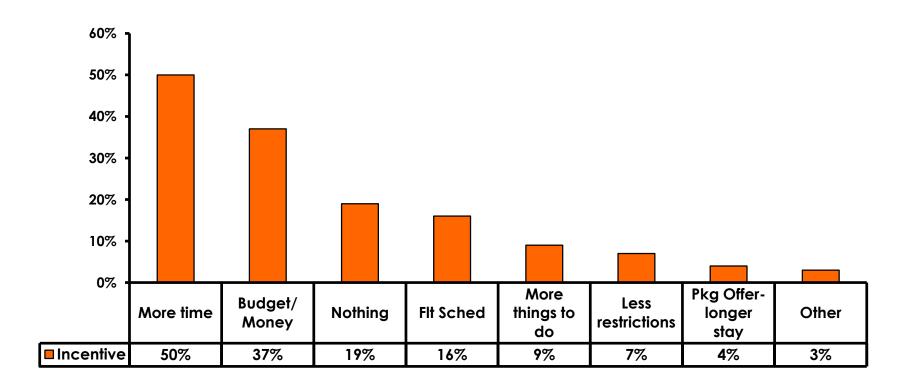


Satisfaction with Other Activities





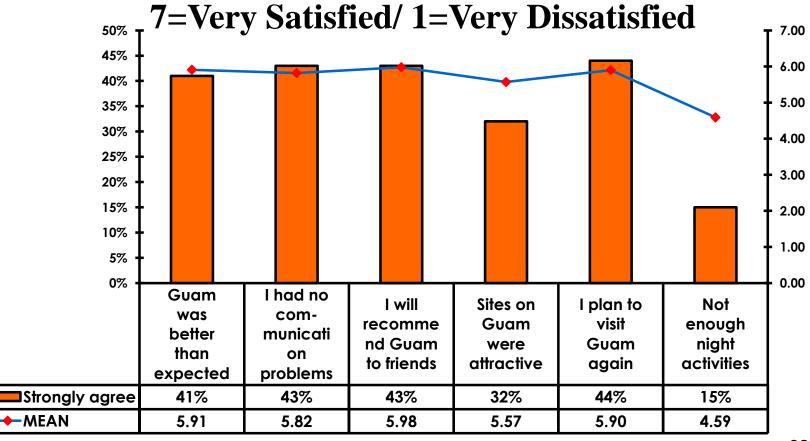
What would it take to make you want to stay an extra day in Guam?





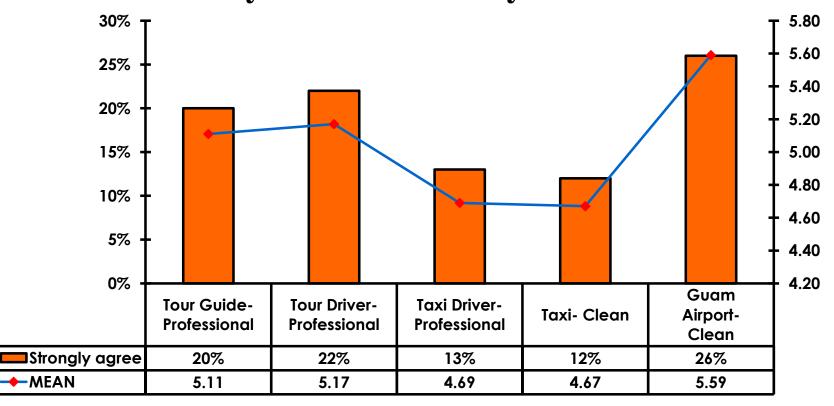
On-Island Perceptions







On-Island Perceptions

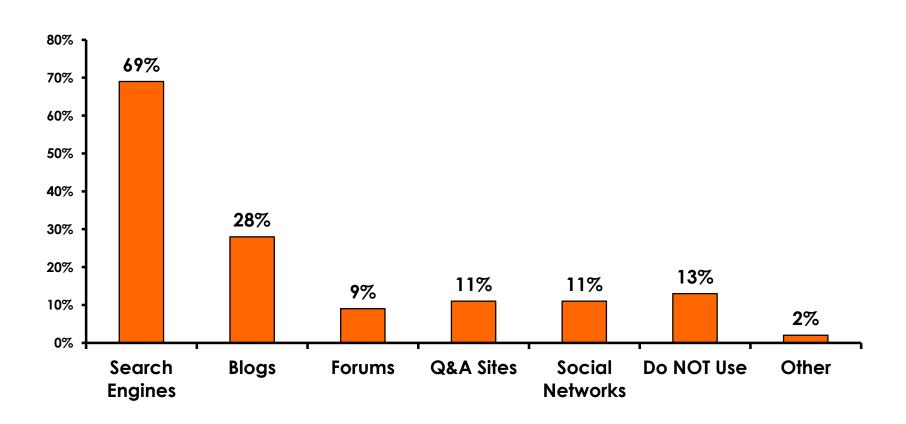




SECTION 5 PROMOTIONS

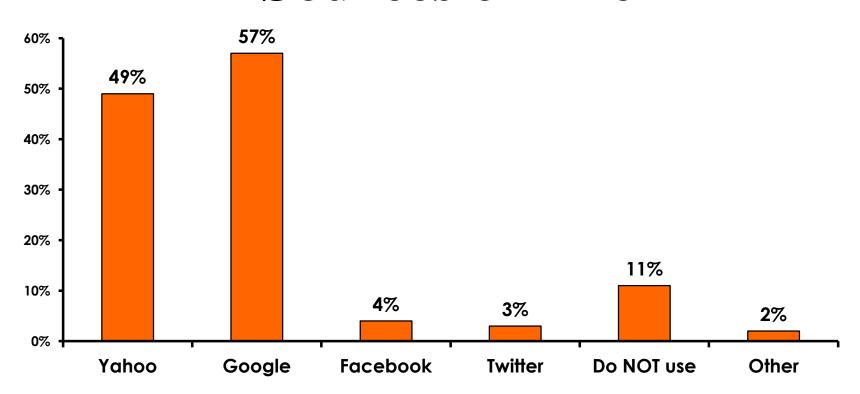


Internet- Guam Sources of Info



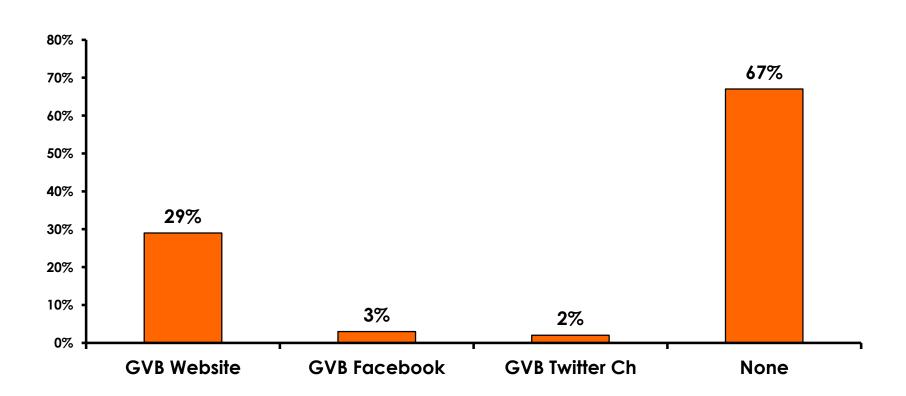


Internet- Things To Do Sources of Info



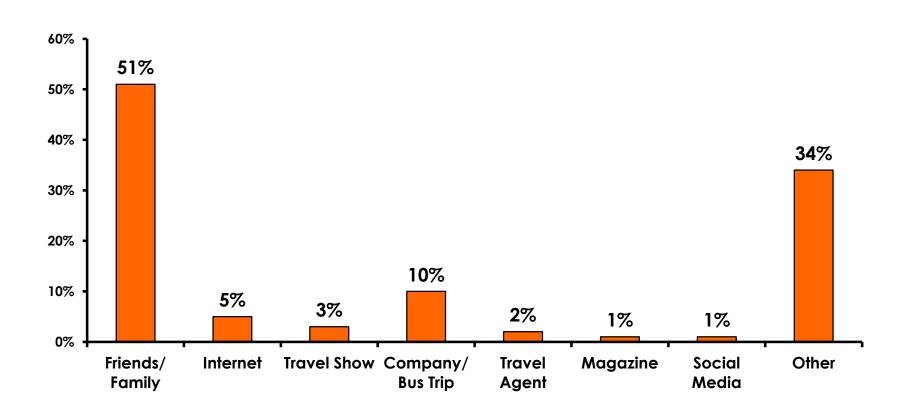


Internet- GVB Sources



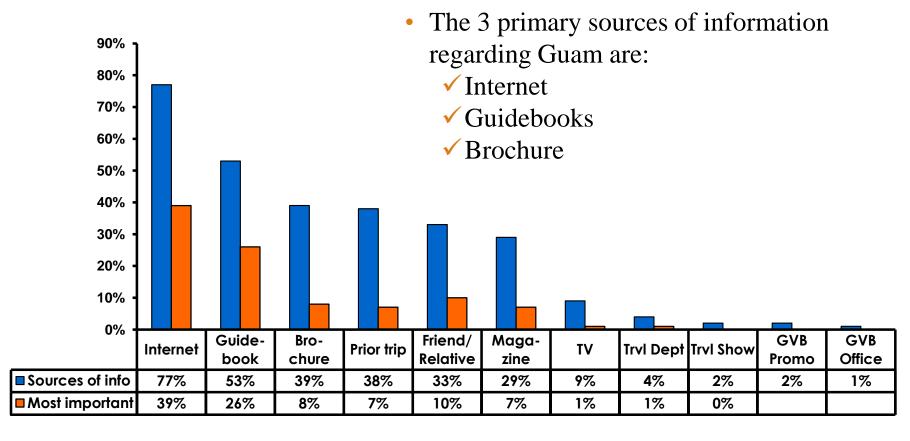


Travel Motivation-Info Sources



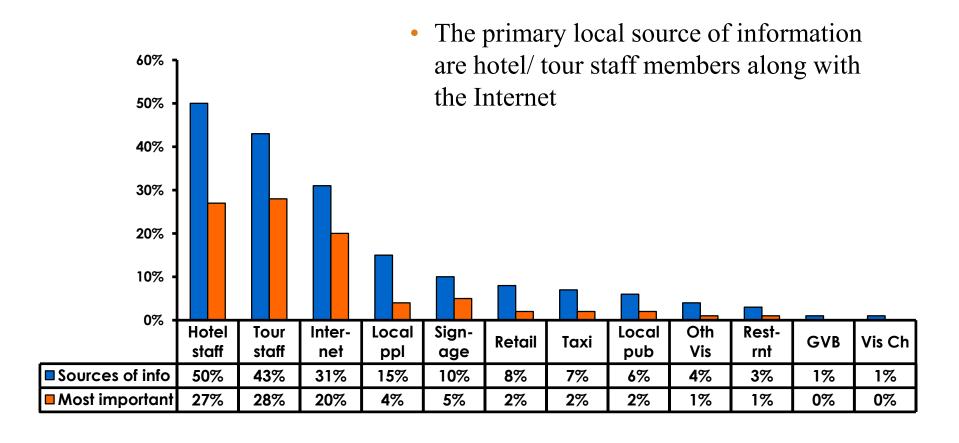


Sources of Information Pre-arrival





Sources of Information Post-arrival

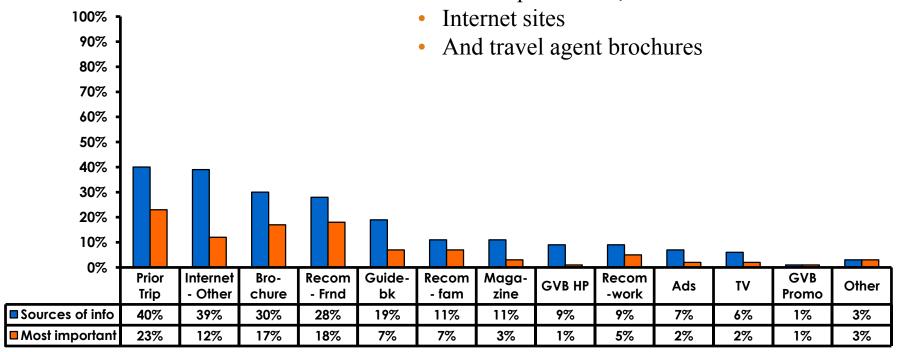




Sources of Information - Motivation

The primary motivational sources of information were.

Prior trip to Guam,

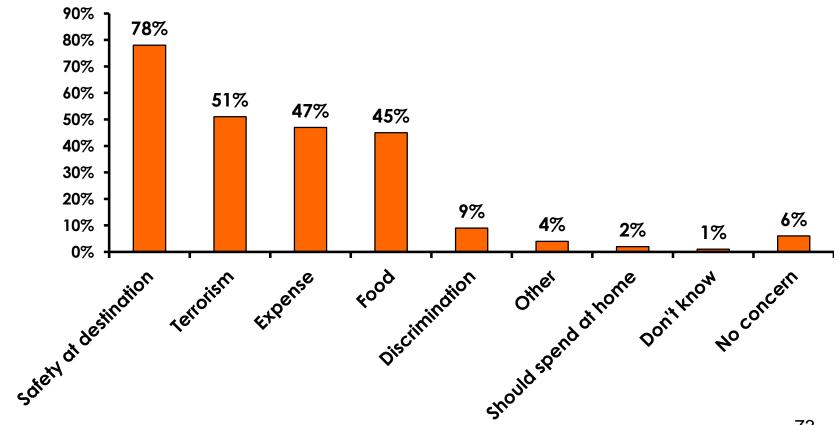




SECTION 6 OTHER ISSUES



Concerns about travel outside of Japan - Overall



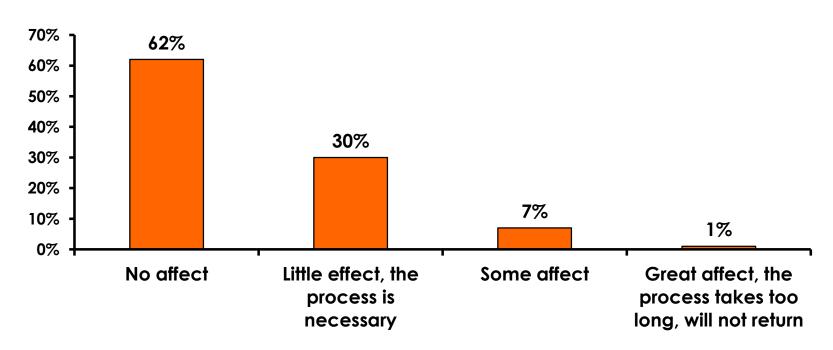


Concerns about travel outside of Japan - By Age & Income

			TOTAL		AC	E			Q26						
			-	18-24	25-34	35-49	50+	<y2.0 million<="" td=""><td>Y2.0M-Y3.0M</td><td>Y3.0M-Y4.0M</td><td>Y4.0M-Y5.0M</td><td>Y5.0M-Y7.0M</td><td>Y7.0M-Y10.0M</td><td>Y10.0M+</td><td>No Income</td></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q21	Safety		78%	76%	84%	76%	76%	77%	69%	77%	83%	81%	75%	77%	100%
	Terrorism		51%	36%	56%	50%	71%	38%	49%	55%	62%	57%	64%	42%	
	Expense		47%	46%	52%	52%	22%	54%	54%	57%	45%	48%	42%	47%	50%
	Food		45%	57%	43%	38%	41%	31%	43%	43%	45%	39%	47%	47%	50%
	Discrimination against Japanese		9%	8%	8%	13%	2%			13%	13%	7%	8%	9%	
	No concerns		6%	6%	2%	10%	10%	8%	6%	8%	4%	7%	8%	8%	
	Other		4%	2%	5%	6%	5%	15%		4%	6%	4%	3%	4%	50%
	Should spend at home		2%	2%	2%		7%	15%		2%	4%		3%		
	Don't know		1%	2%			5%	15%	3%						
	Total C	ount	341	90	122	86	41	13	35	53	47	54	36	53	2



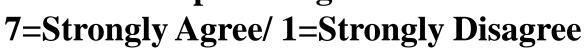
Security Screening/Immigration Process at Guam International Airport

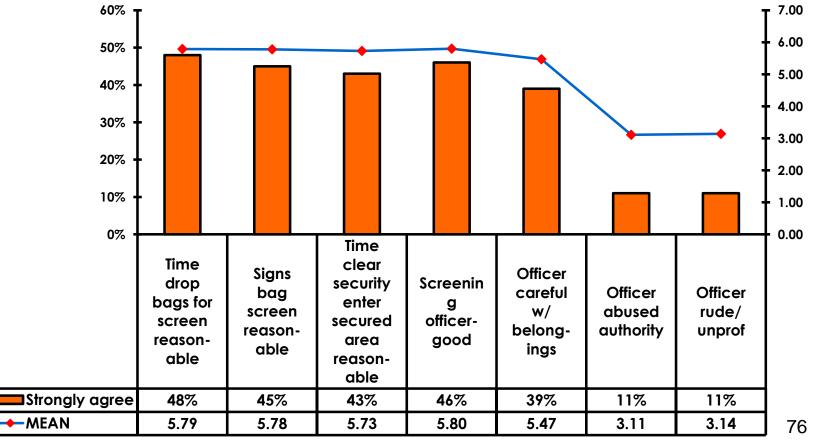




Airport Screening

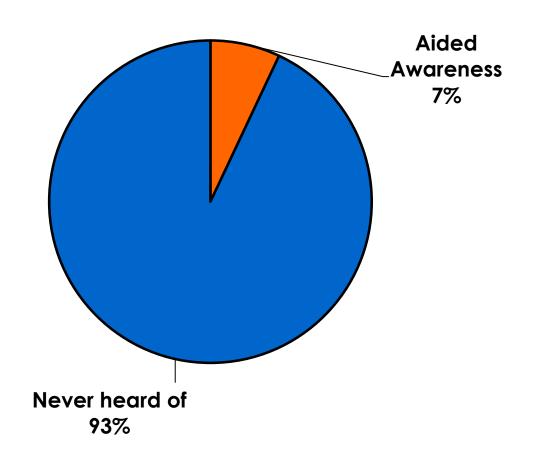
7pt Rating Scale







Shop Guam Festival





Shop Guam Festival - Impact n=23

