

Guam Visitors Bureau

Japan Visitor Tracker Exit Profile

FY2018 DATA AGGREGATION

Prepared by: Anthology Research

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#instaGuam



Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **4339** departing Japan 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 **4339** is +/- 1.49 percentage points with a 95% confidence level. That is, if all Japan 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 +/- 1.49 percentage points.

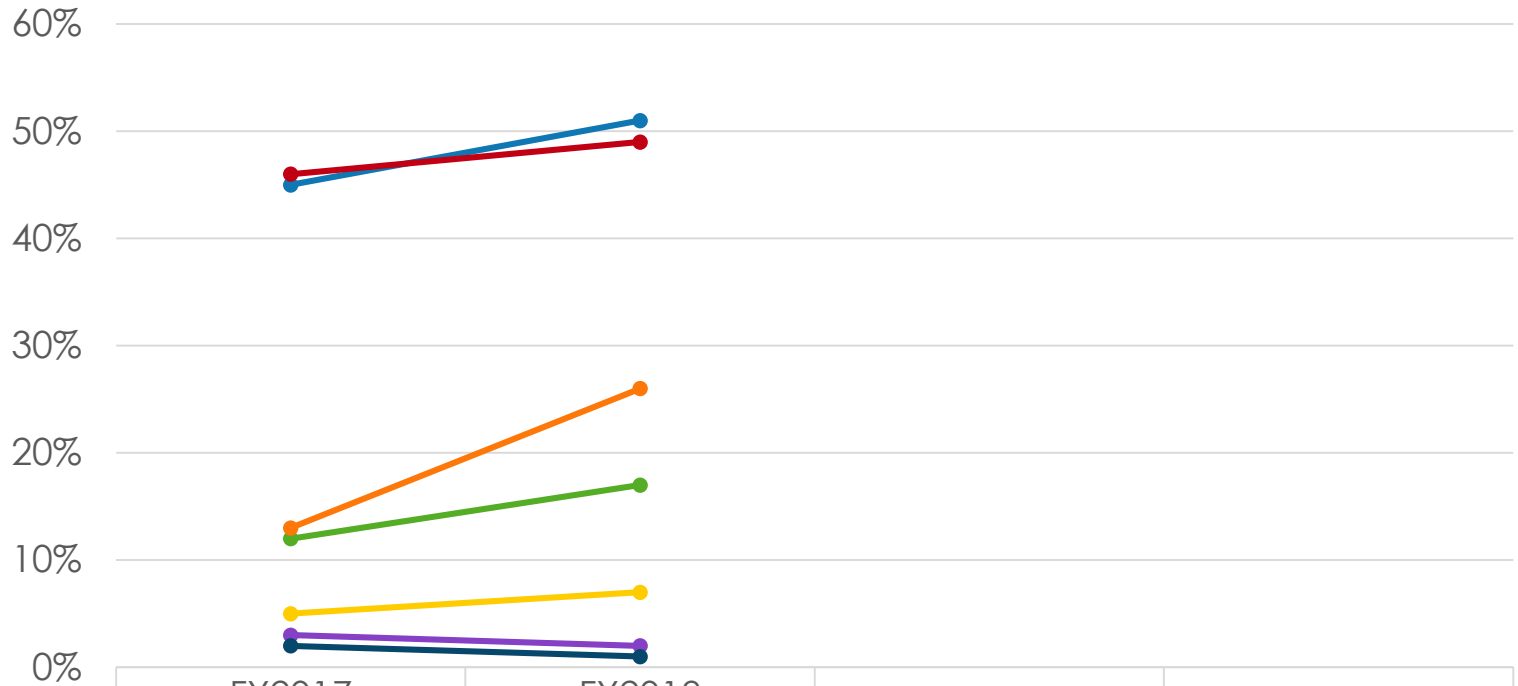
Objectives

- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japan 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.

Key Highlighted Segments

- **The specific objectives were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - Families (Q5)
 - Office Lady/ Salary Woman (Gender/ Q25 Office worker- non-managerial)
 - Group Tour (Q6)
 - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)
 - Silver (QF Age 60+)
 - Wedding (Q5A)
 - Repeat Visitor (Q3)
 - To identify the most significant factors affecting overall visitor satisfaction.
 - To identify (for all Japan visitors) the most important determinants of on-island spending

Key Highlighted Segments

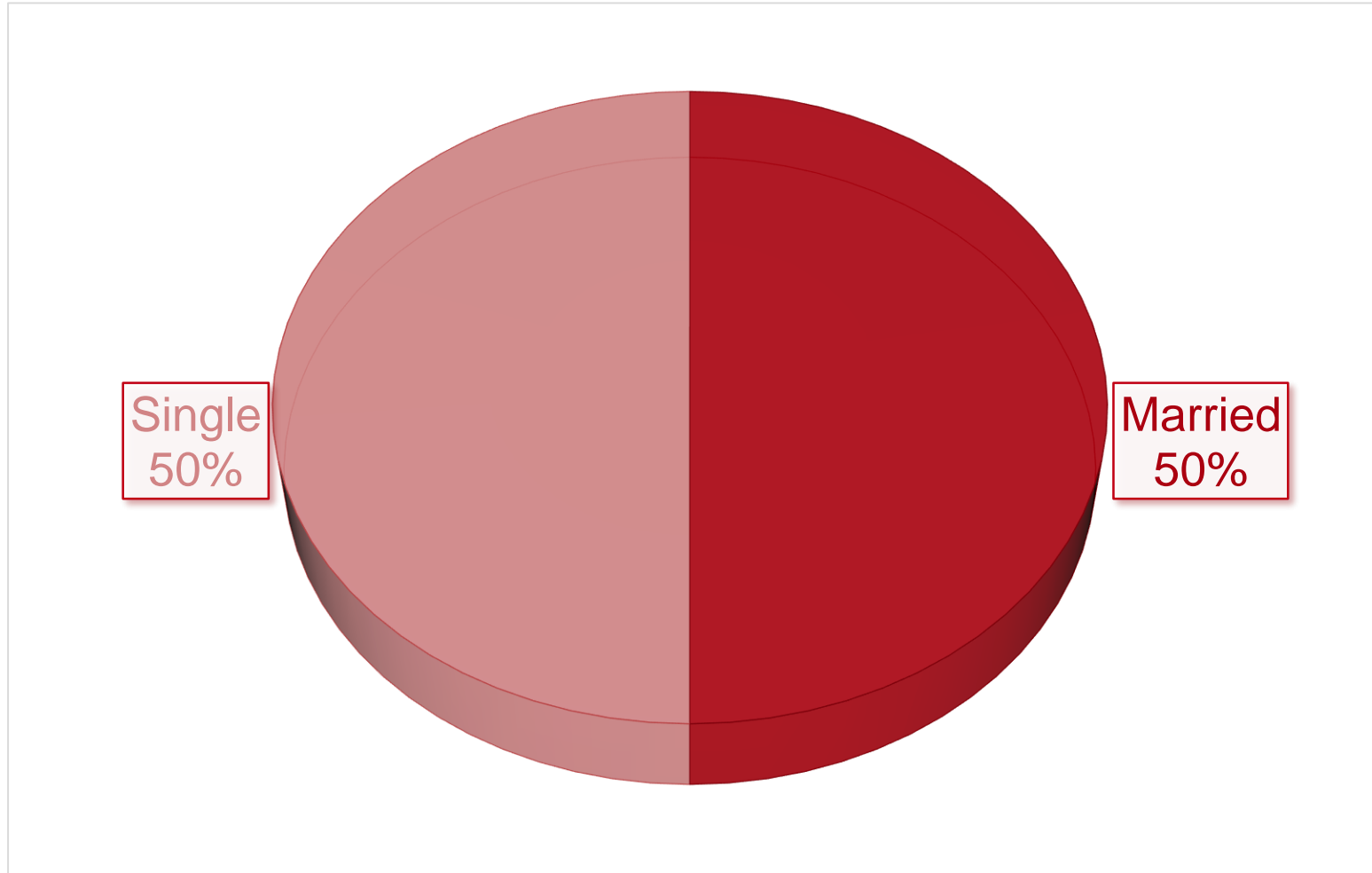


	FY2017	FY2018		
Family	45%	51%		
Repeat	46%	49%		
Office Lady	12%	17%		
Wedding	5%	7%		
Silver	3%	2%		
Group	13%	26%		
MICE	2%	1%		

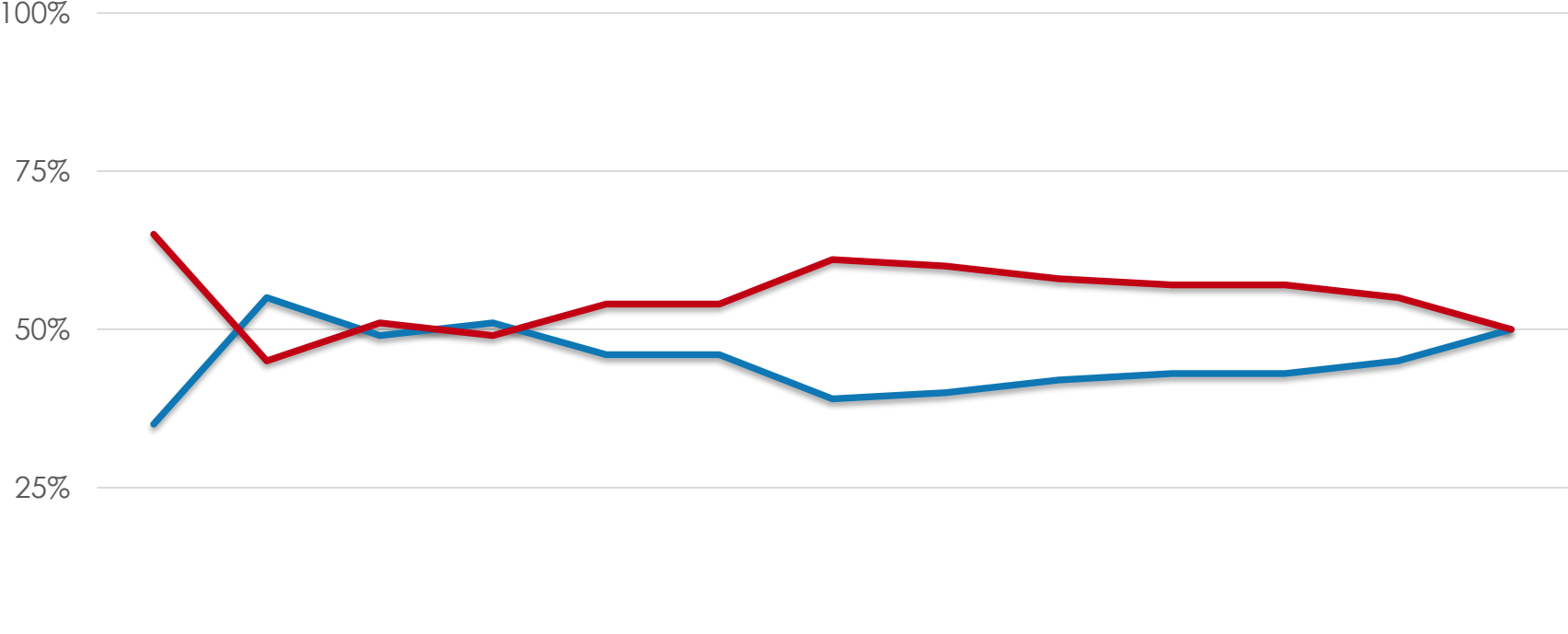
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



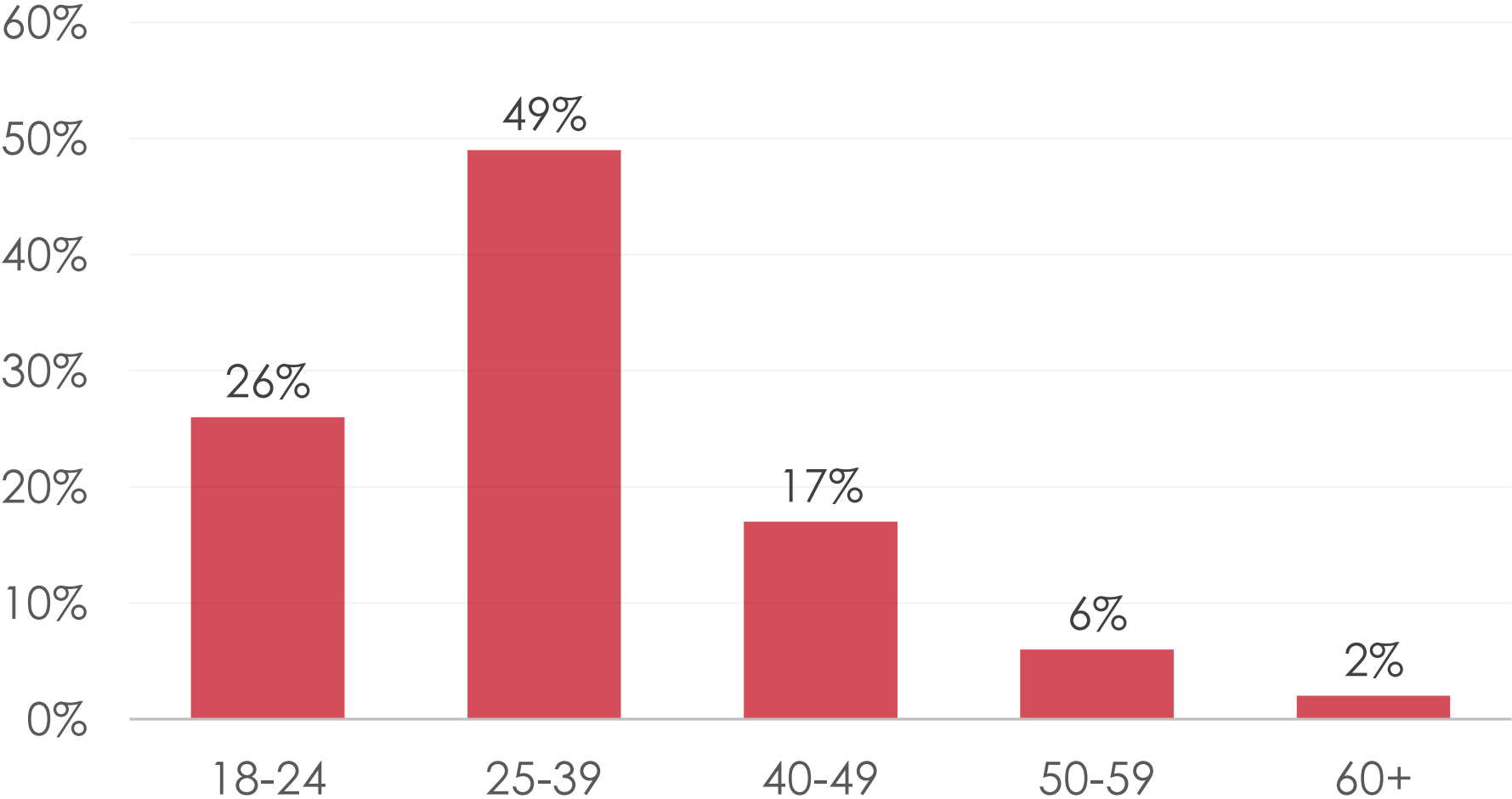
Marital status – Tracking



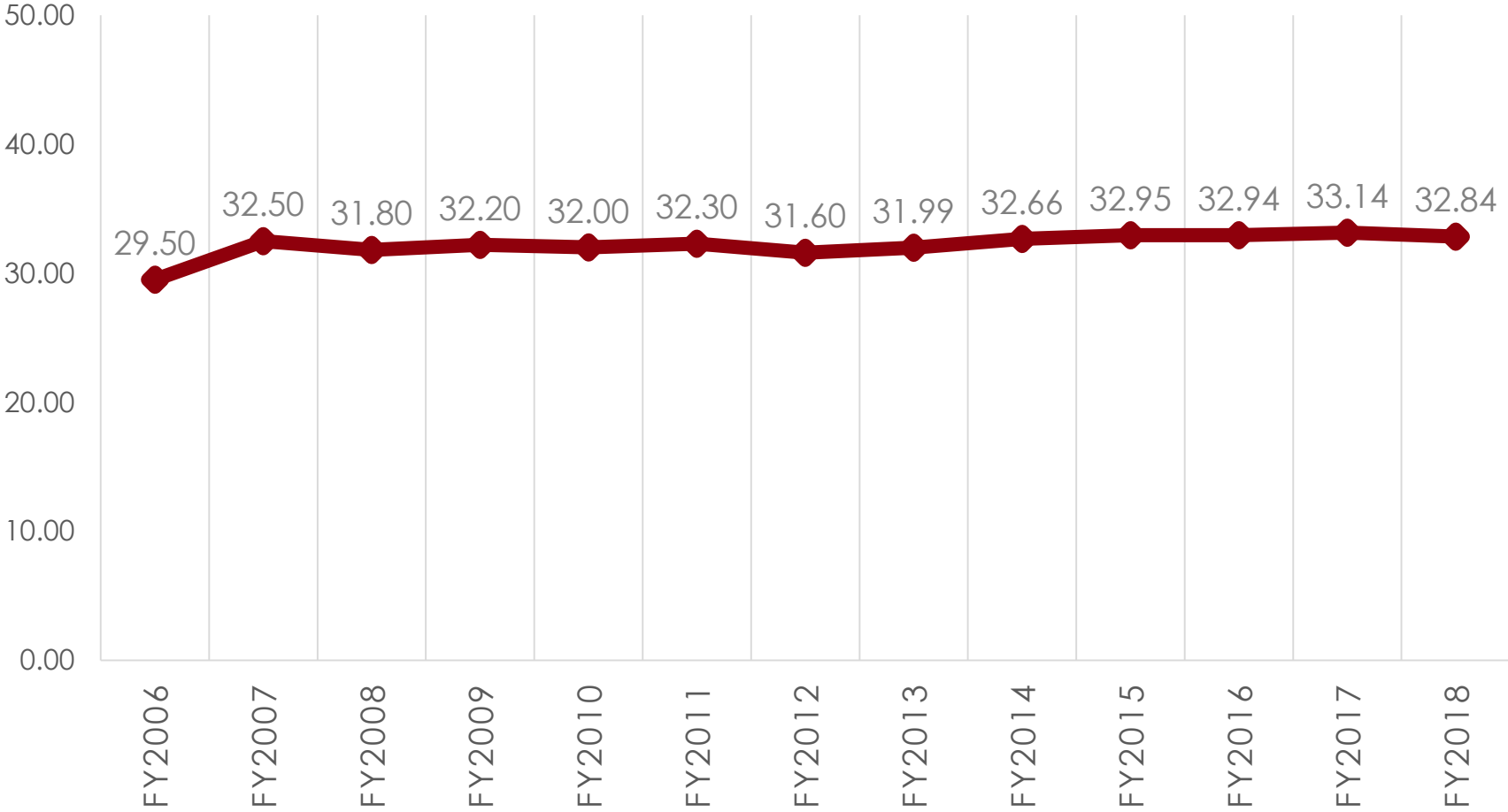
	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
Married	35%	55%	49%	51%	46%	46%	39%	40%	42%	43%	43%	45%	50%
Single	65%	45%	51%	49%	54%	54%	61%	60%	58%	57%	57%	55%	50%

Age

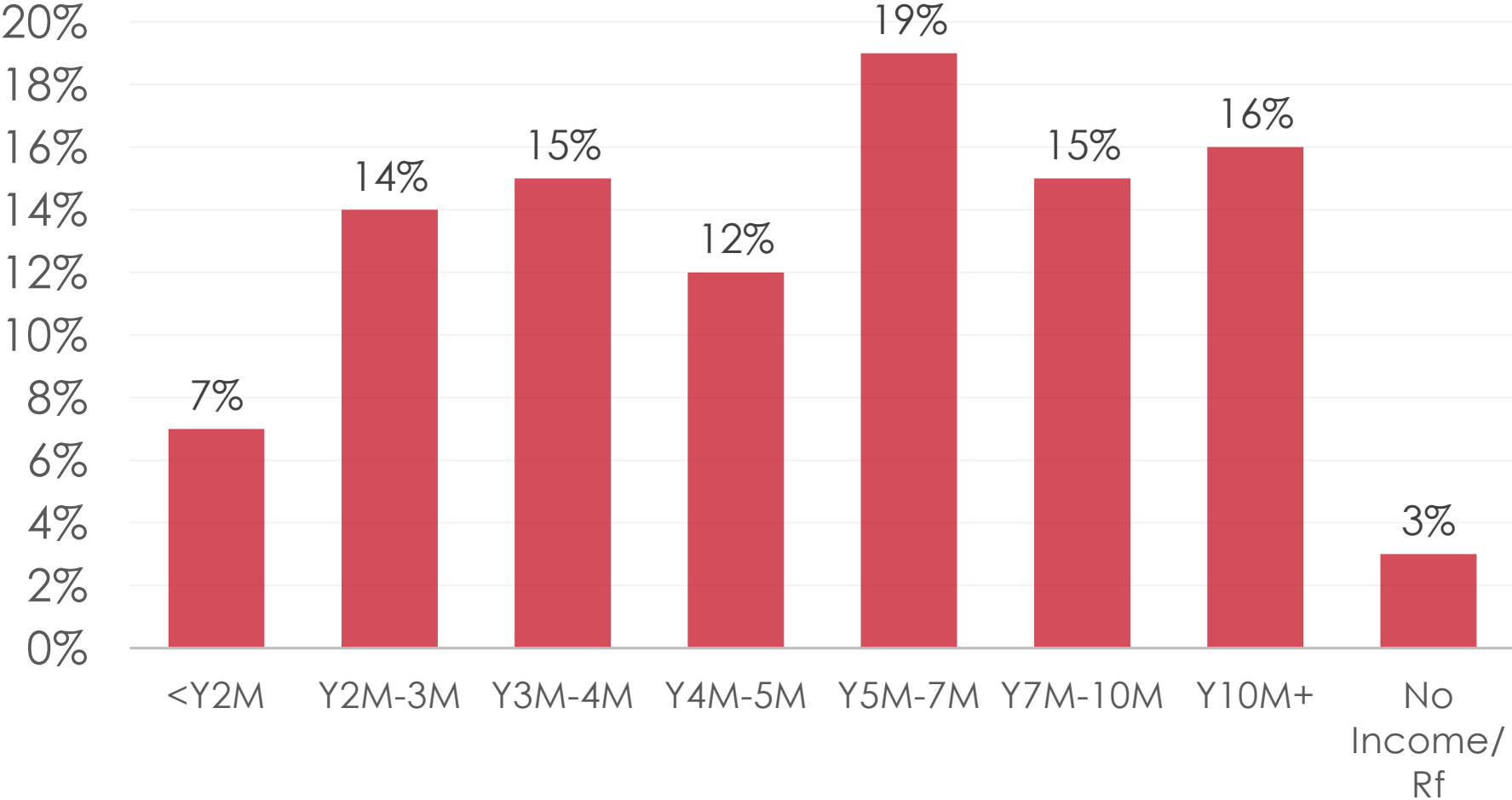
MEAN = 32.84
MEDIAN = 30



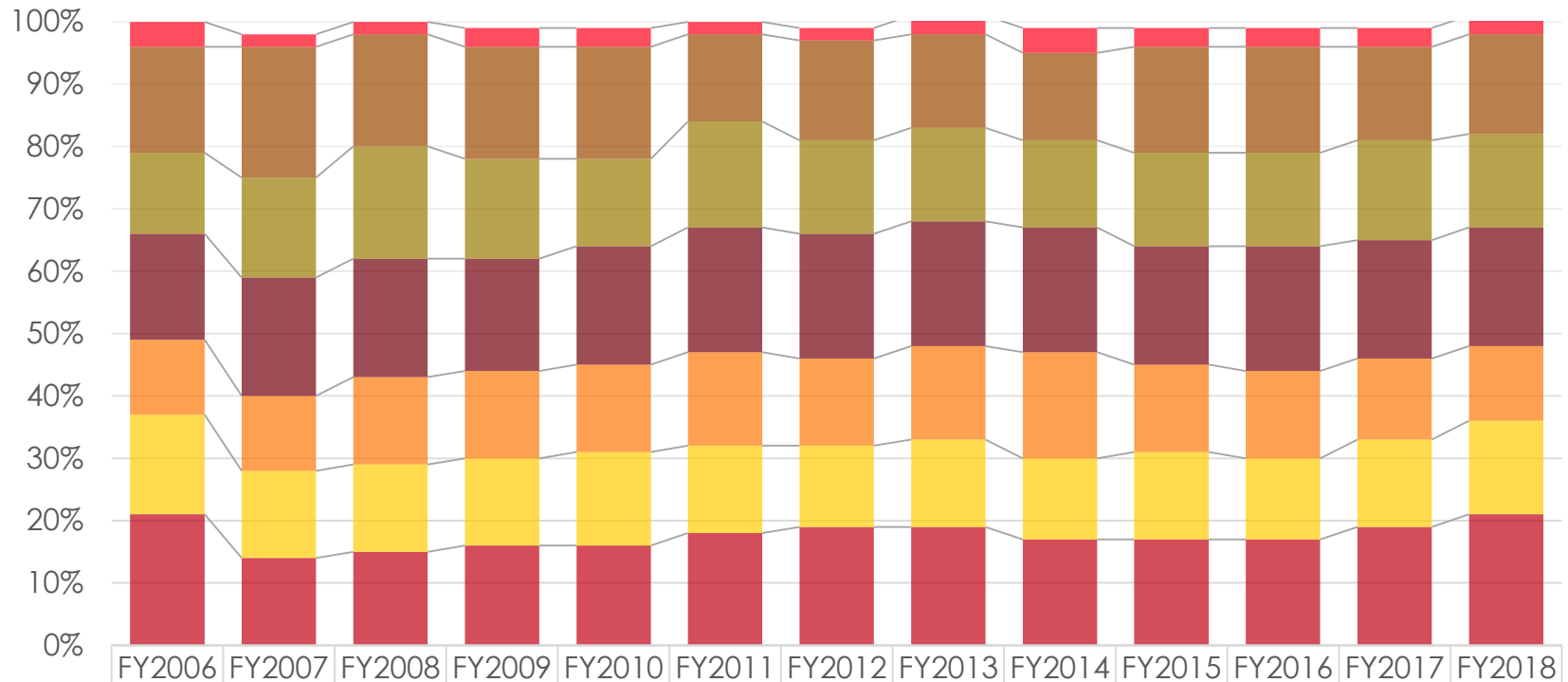
Age – Tracking



Annual Household Income

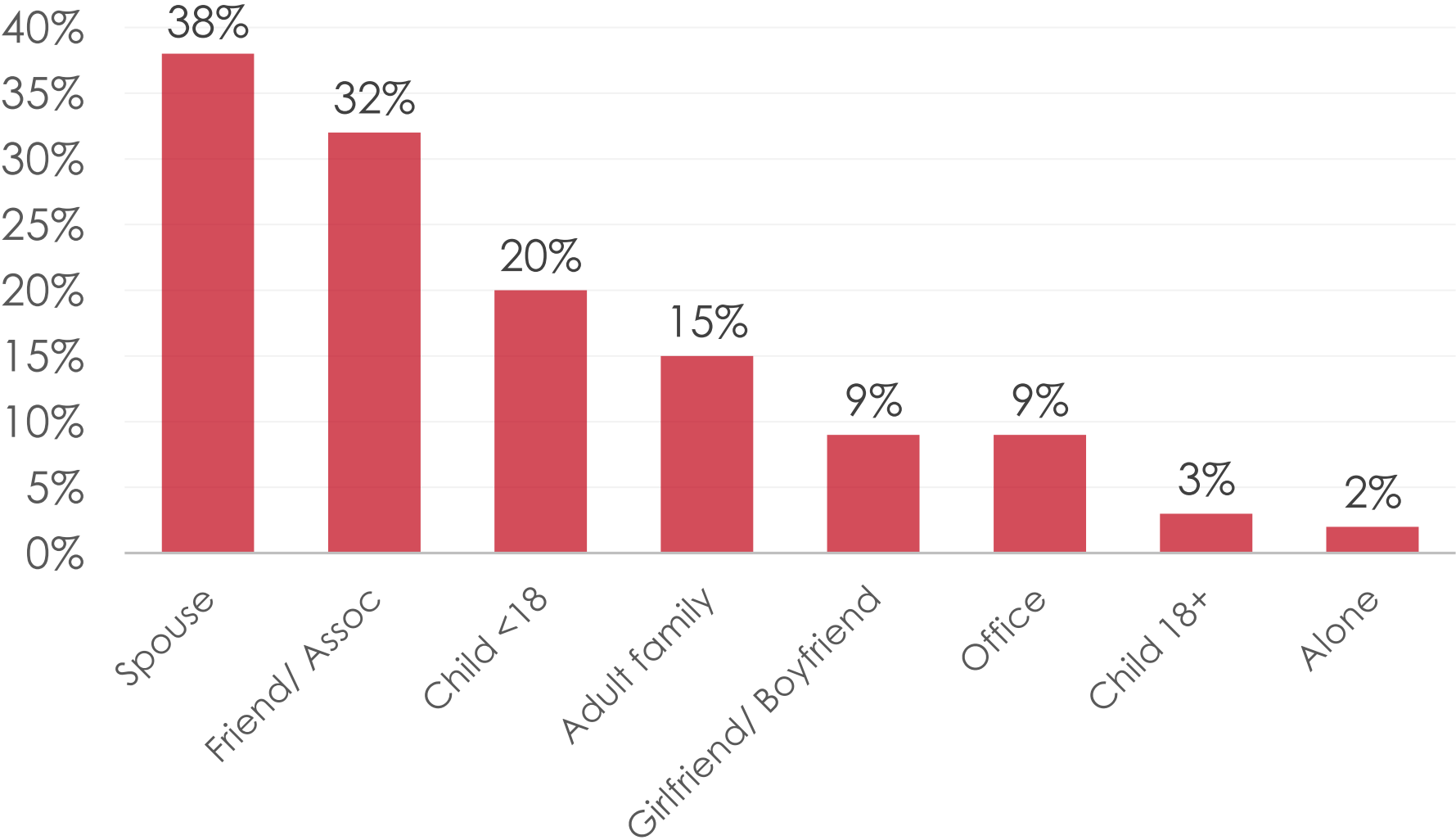


Annual Household Income - Tracking

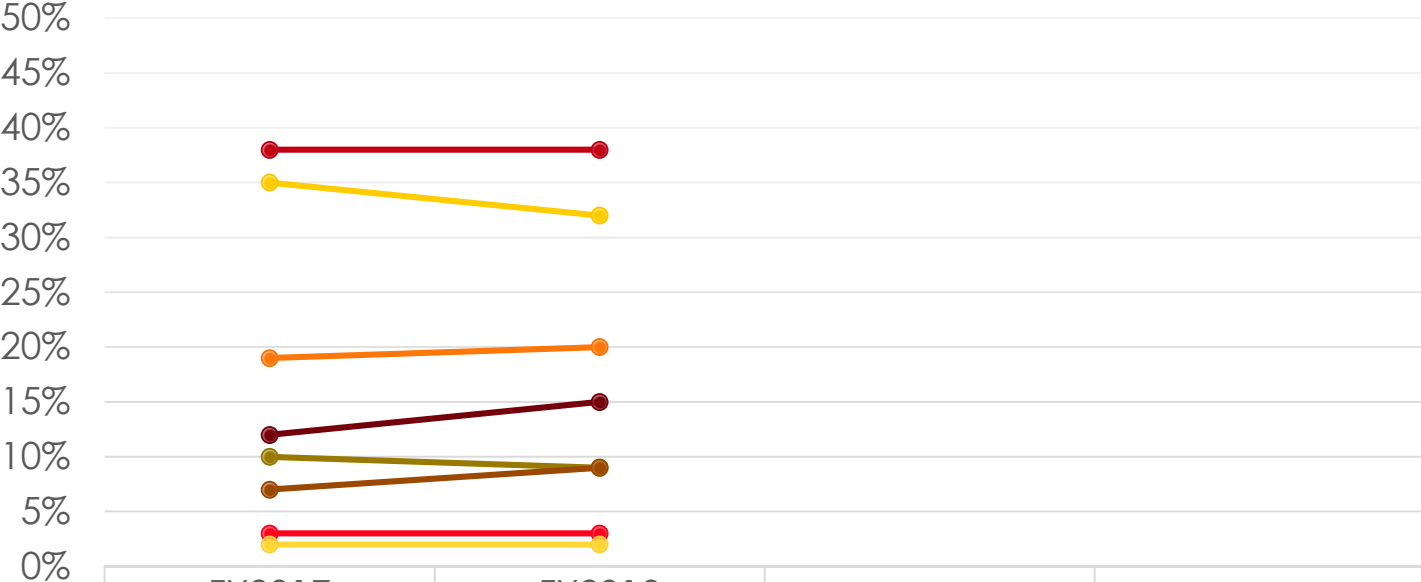


	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
■ Rf	4%	2%	2%	3%	3%	2%	2%	3%	4%	3%	3%	3%	3%
■ Y10.0M+	17%	21%	18%	18%	18%	14%	16%	15%	14%	17%	17%	15%	16%
■ Y7.0M-9.9M	13%	16%	18%	16%	14%	17%	15%	15%	14%	15%	15%	16%	15%
■ Y5.0M-6.9M	17%	19%	19%	18%	19%	20%	20%	20%	20%	19%	20%	19%	19%
■ Y4.0M-4.9M	12%	12%	14%	14%	14%	15%	14%	15%	17%	14%	14%	13%	12%
■ Y3.0M-3.9M	16%	14%	14%	14%	15%	14%	13%	14%	13%	14%	13%	14%	15%
■ <Y3.0M	21%	14%	15%	16%	16%	18%	19%	19%	17%	17%	17%	19%	21%

Travel Party



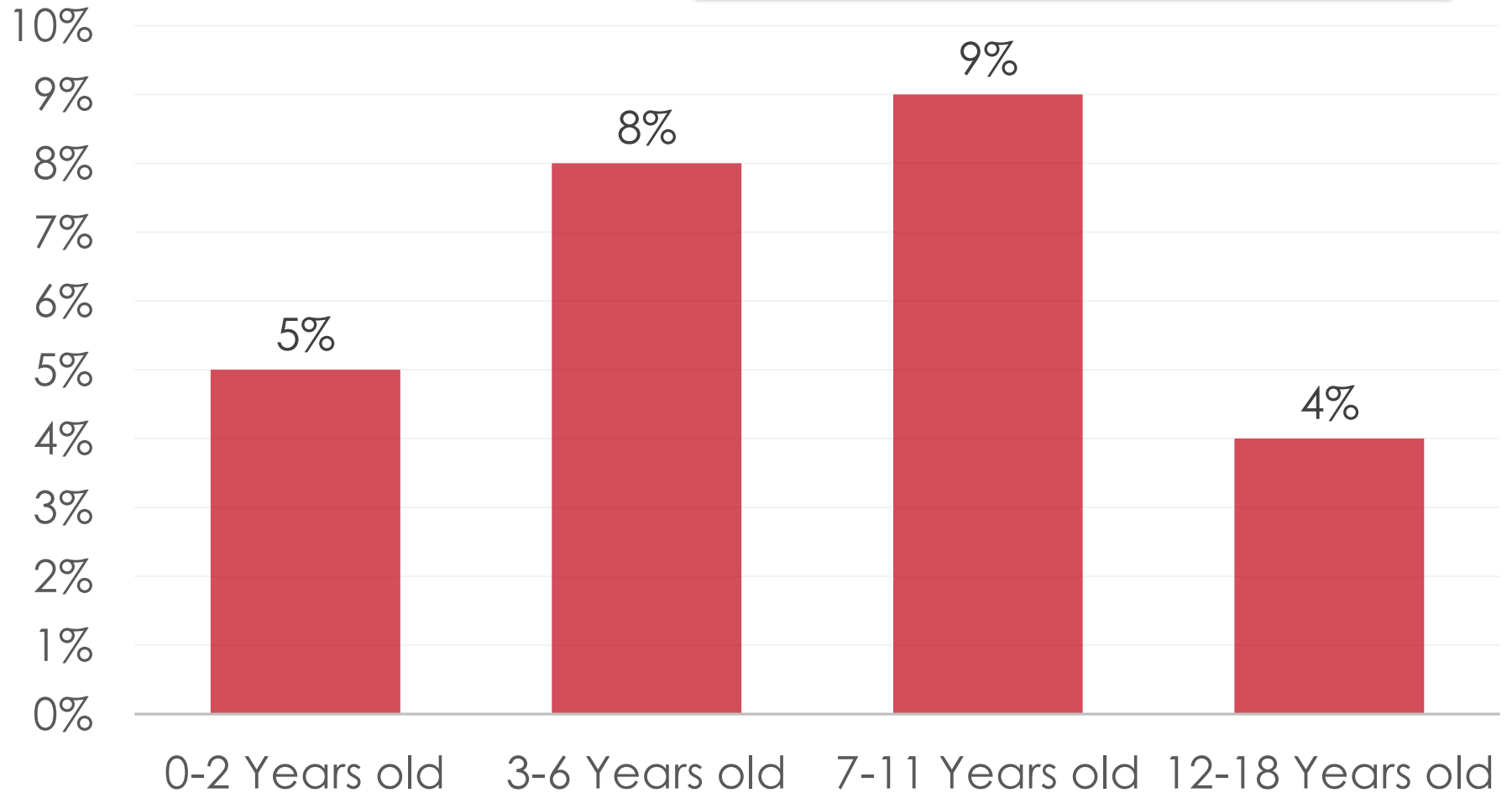
Travel Party



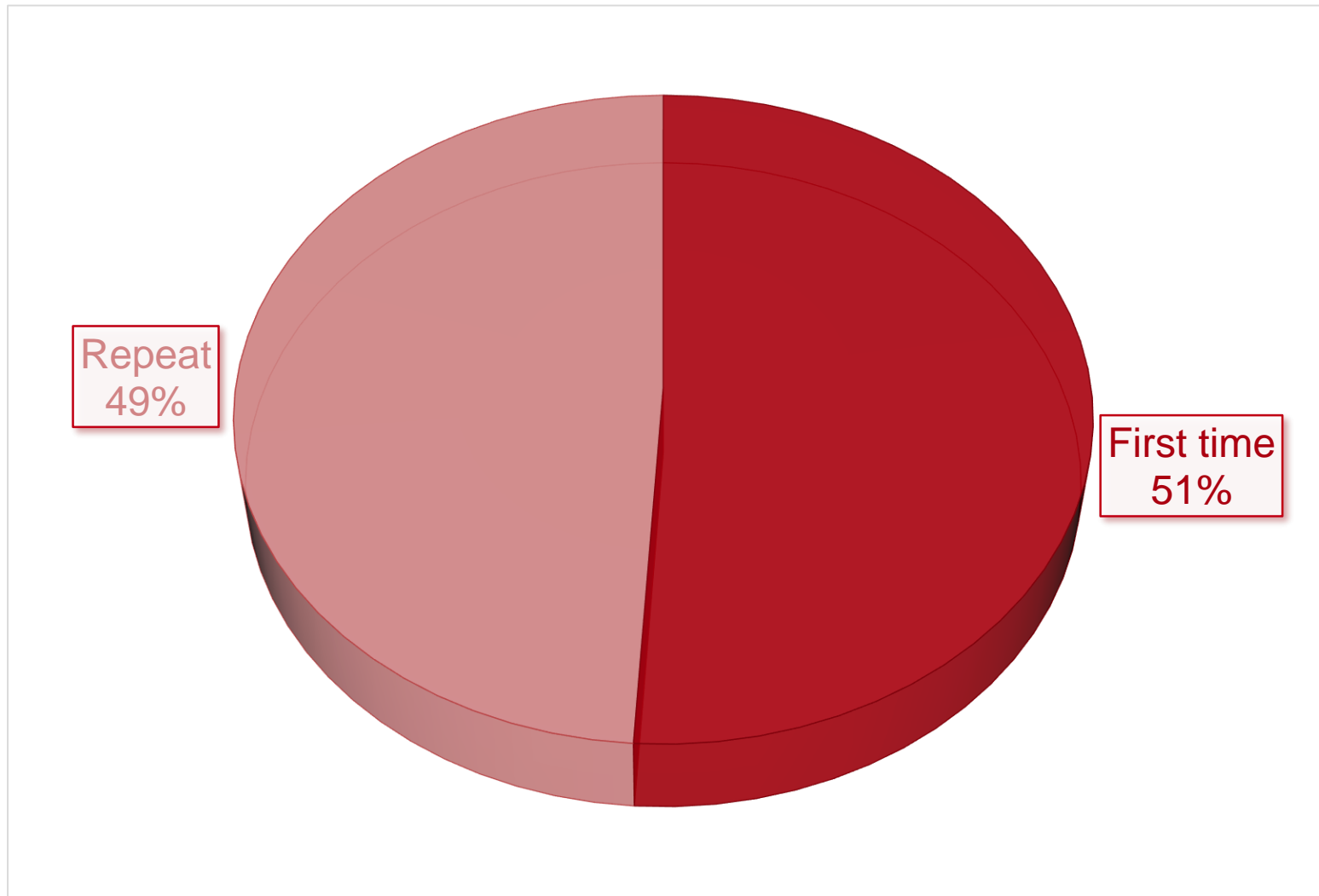
	FY2017	FY2018		
Spouse	38%	38%		
Friend/ Assoc	35%	32%		
Child <18	19%	20%		
Adult Family	12%	15%		
Girlfriend/ Boyfriend	10%	9%		
Office	7%	9%		
Child 18+	3%	3%		
Alone	2%	2%		

Travel Party - Children

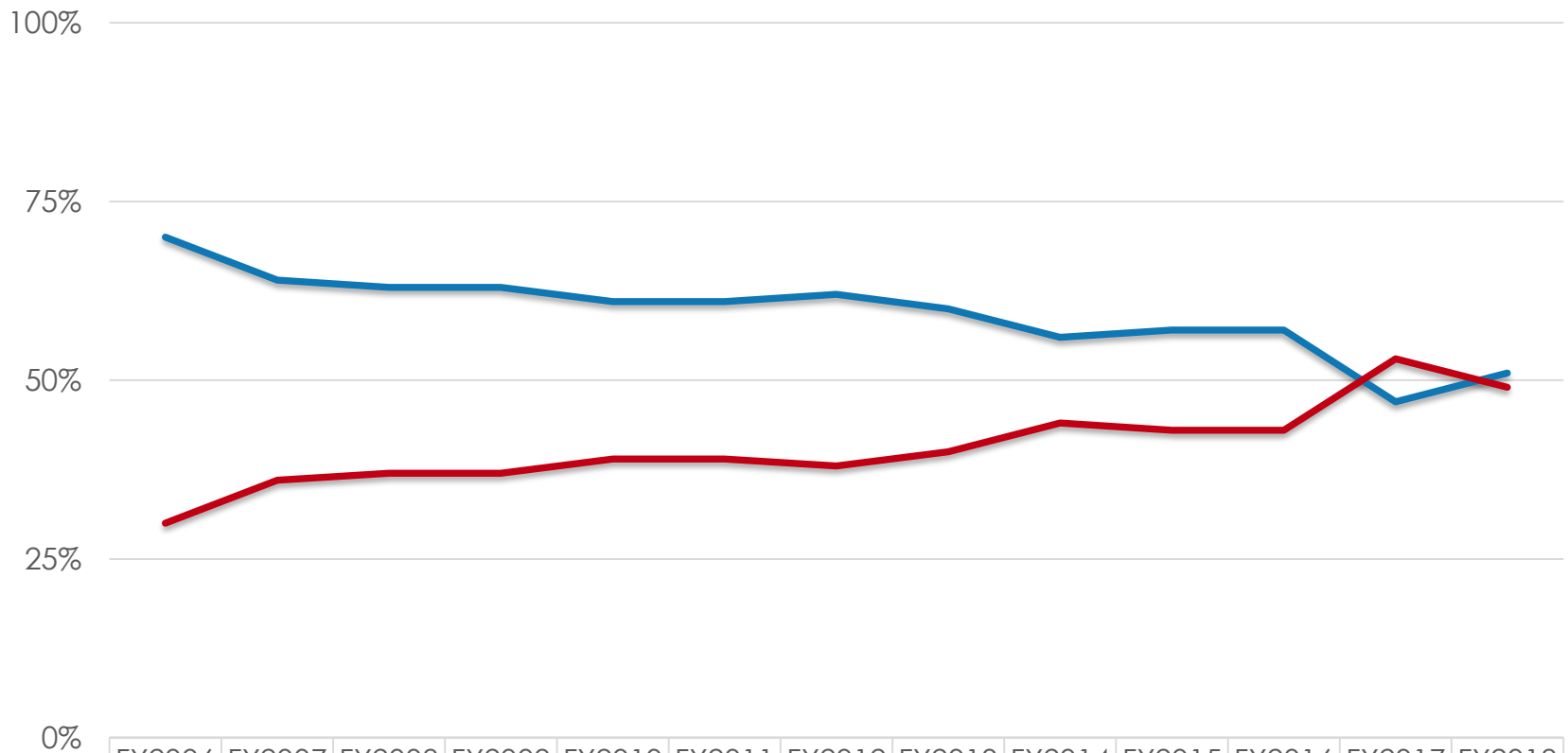
20% TRAVELING WITH A CHILD



Trips to Guam



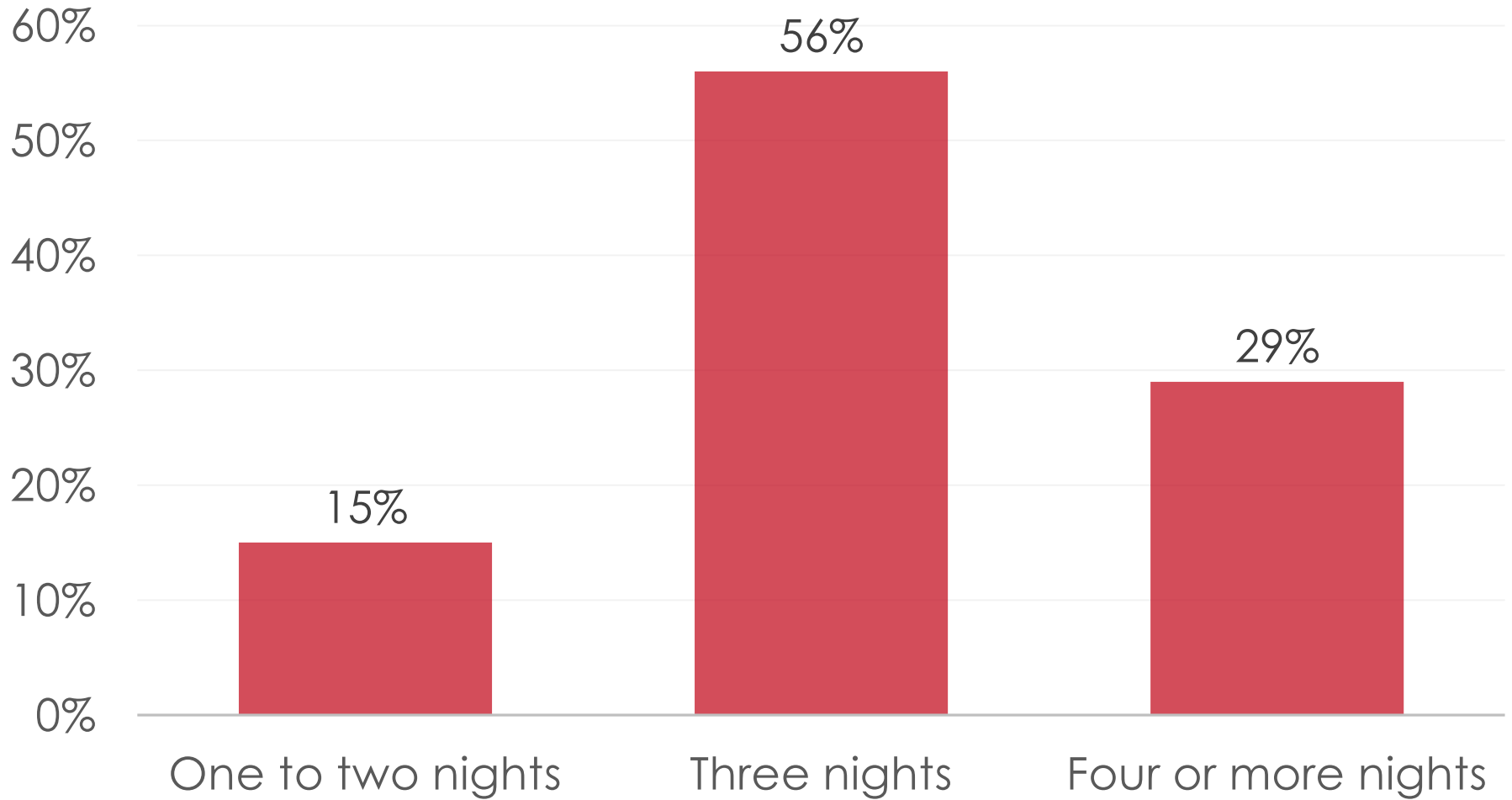
Trips to Guam – Tracking



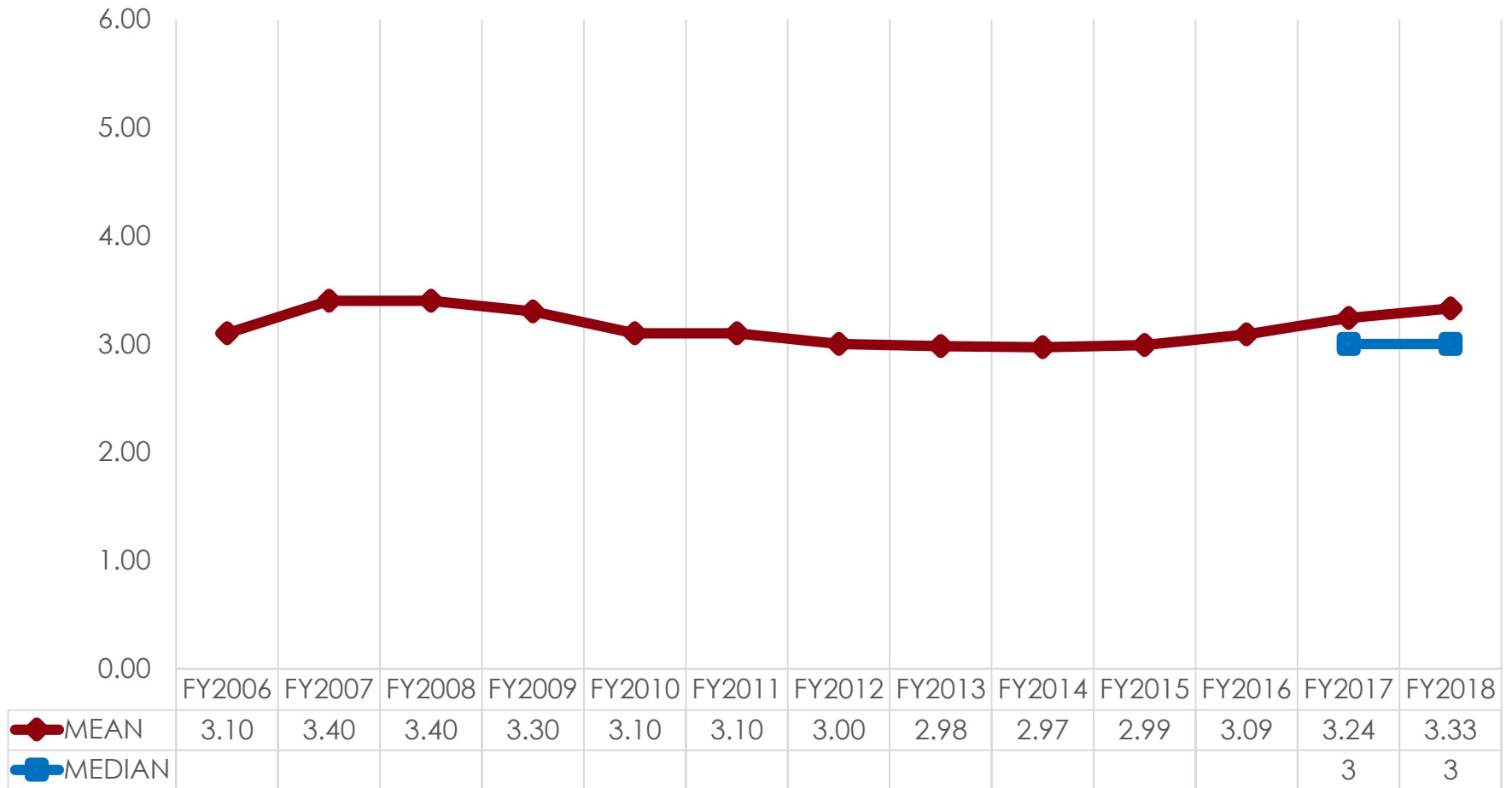
	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
1st Time	70%	64%	63%	63%	61%	61%	62%	60%	56%	57%	57%	47%	51%
Repeat	30%	36%	37%	37%	39%	39%	38%	40%	44%	43%	43%	53%	49%

Length of Stay

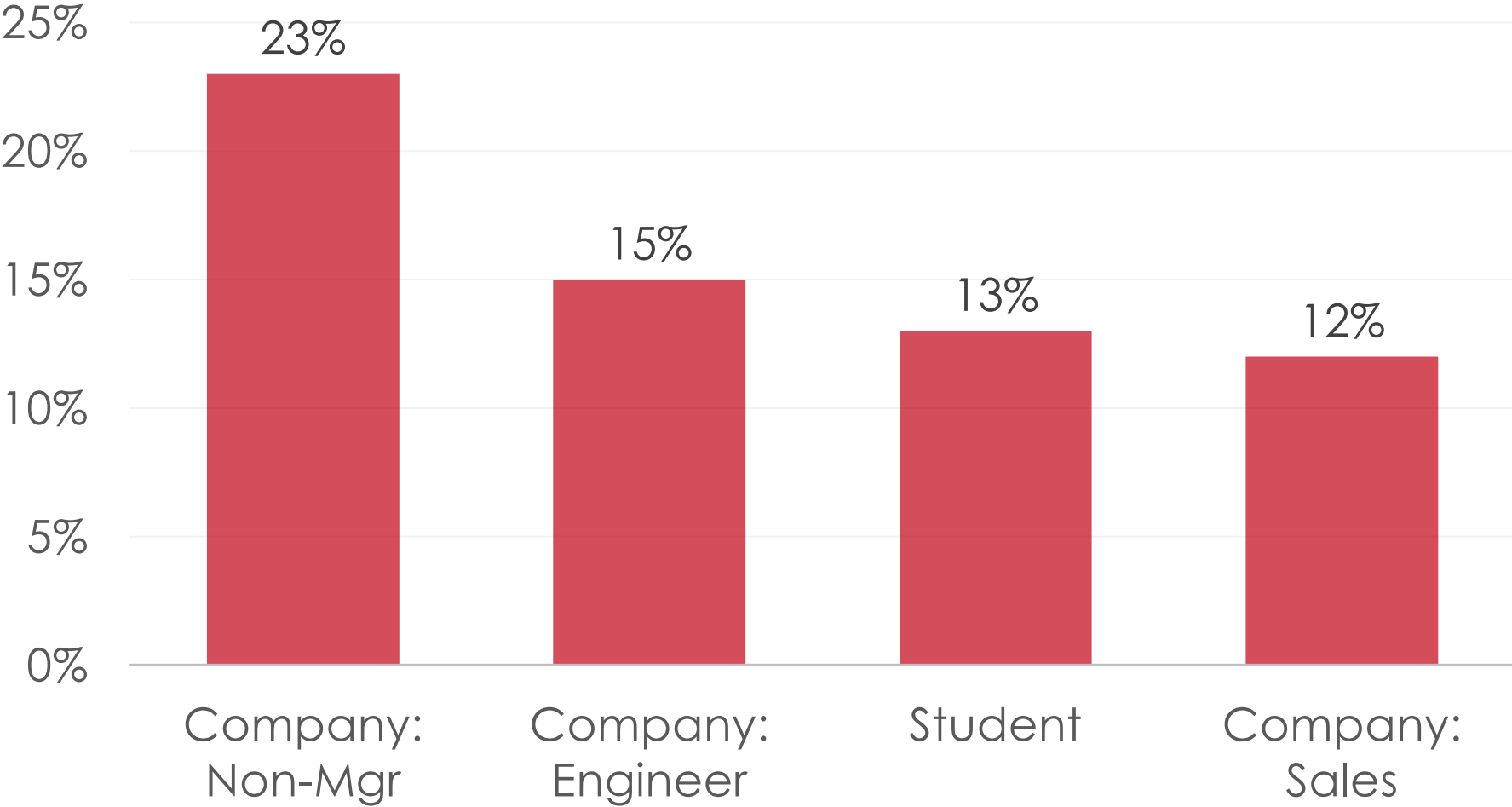
MEAN NUMBER OF NIGHTS = 3.33
MEDIAN NUMBER OF NIGHTS = 3



Length of Stay – Tracking



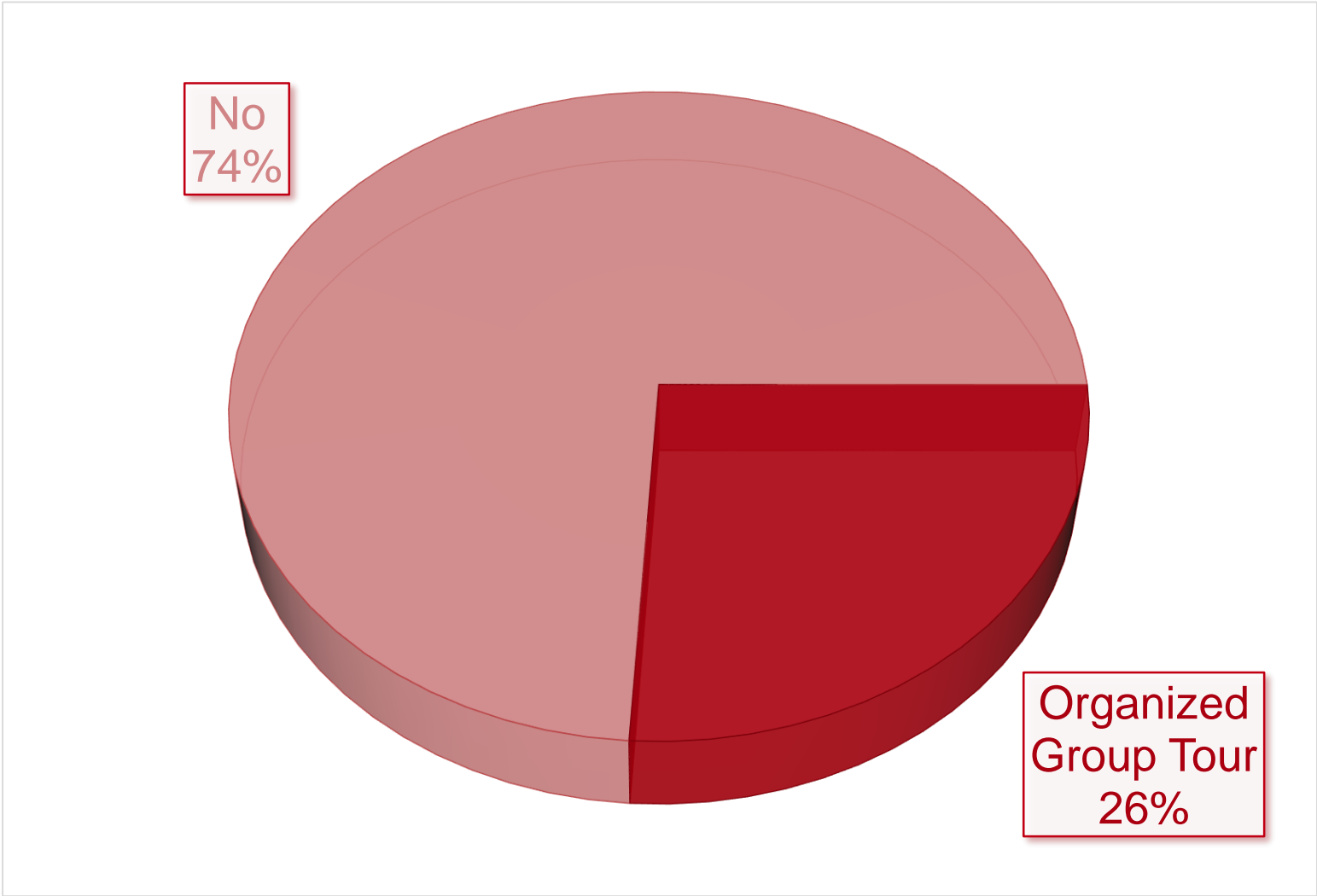
Occupation – Top Responses (10%+)



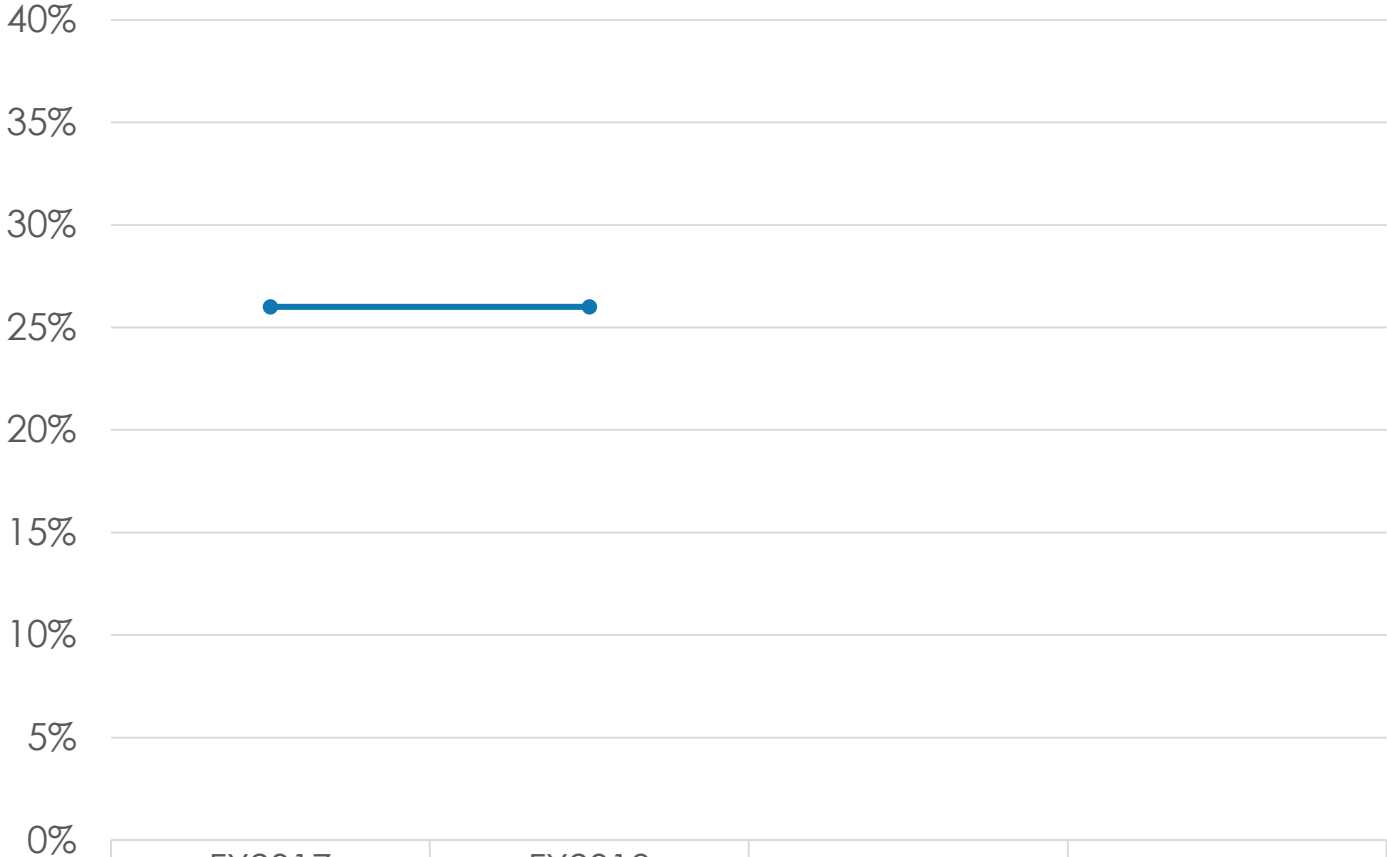
SECTION 2

TRAVEL PLANNING

Organized Group Tour



Organized Group Tour



Organized Group Tour

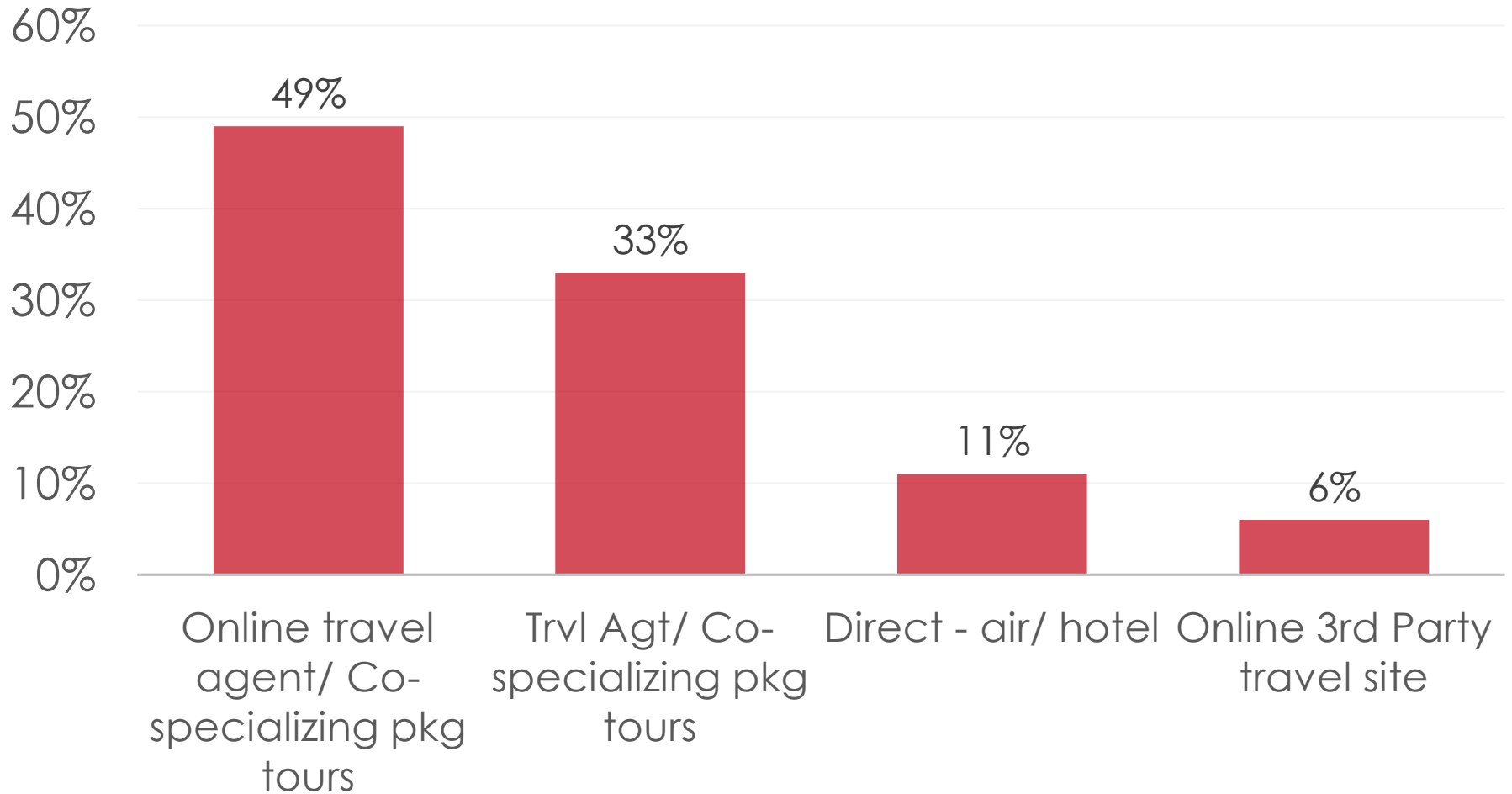
FY2017

FY2018

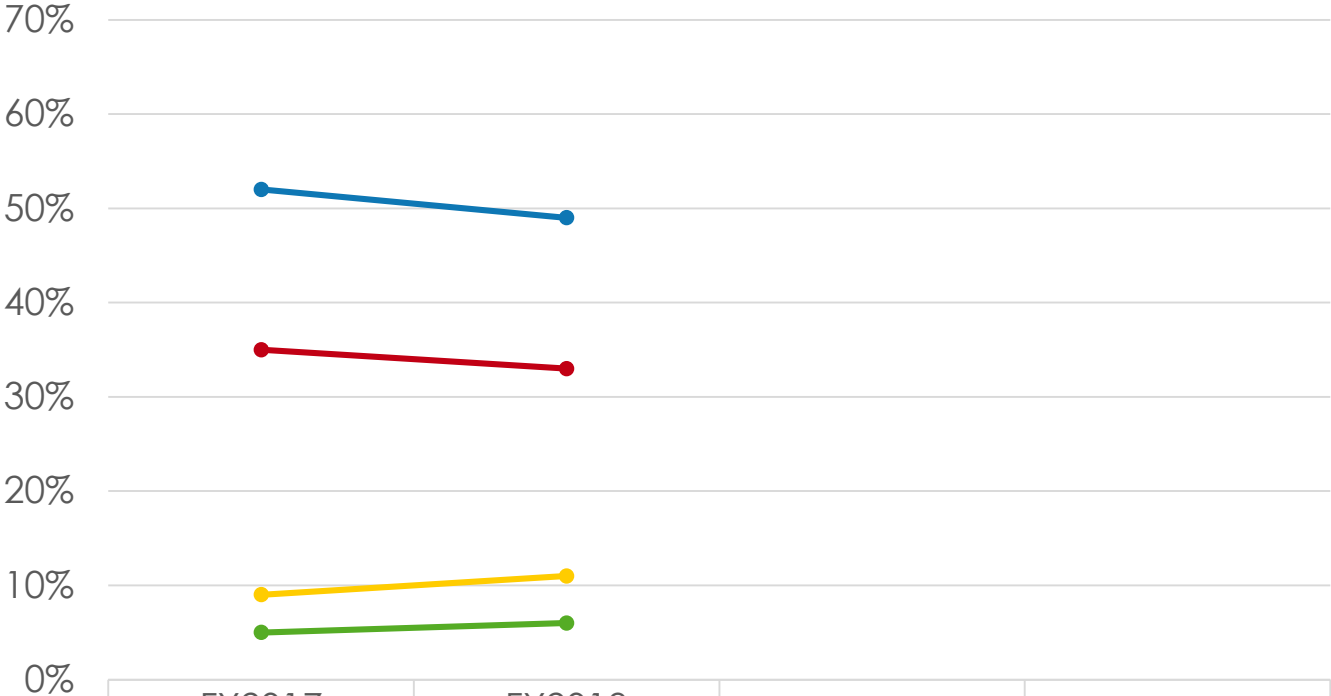
26%

26%

Travel Arrangements

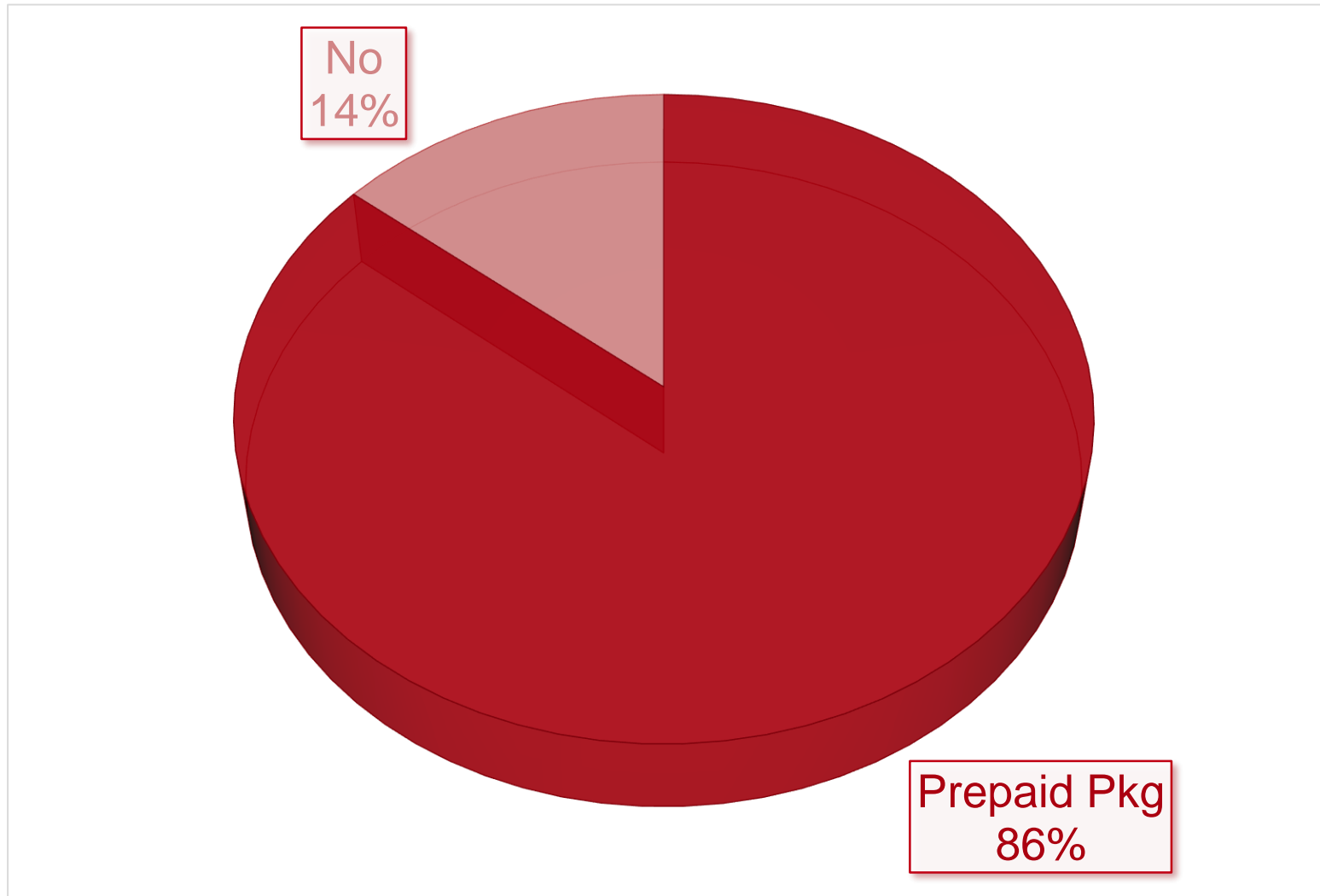


Travel Arrangements

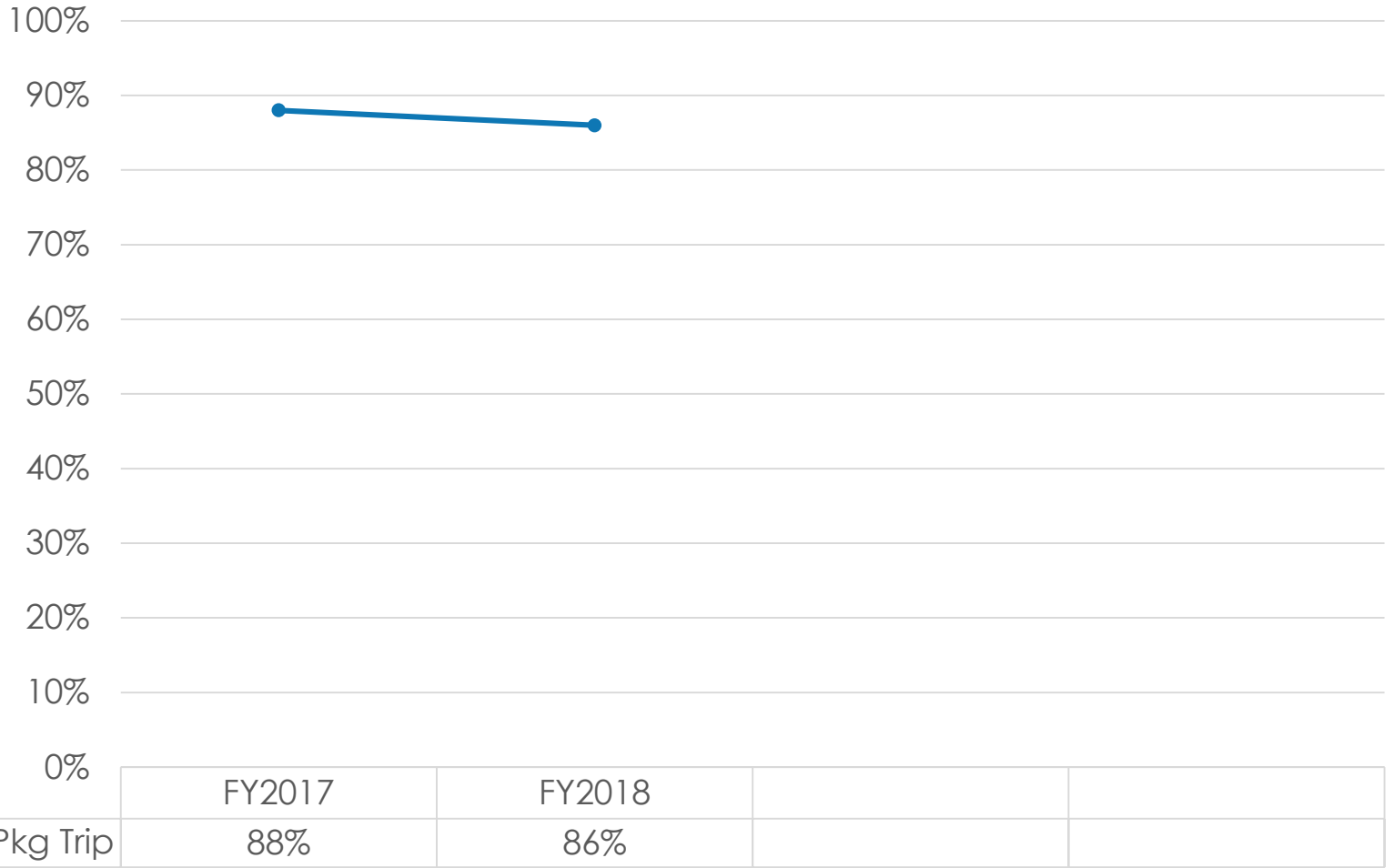


	FY2017	FY2018		
—●— Online travel agent	52%	49%		
—●— Trvl Agt/ Co- Pkg Tour	35%	33%		
—●— Online 3rd Party	5%	6%		
—●— Direct Air/ Hotel	9%	11%		

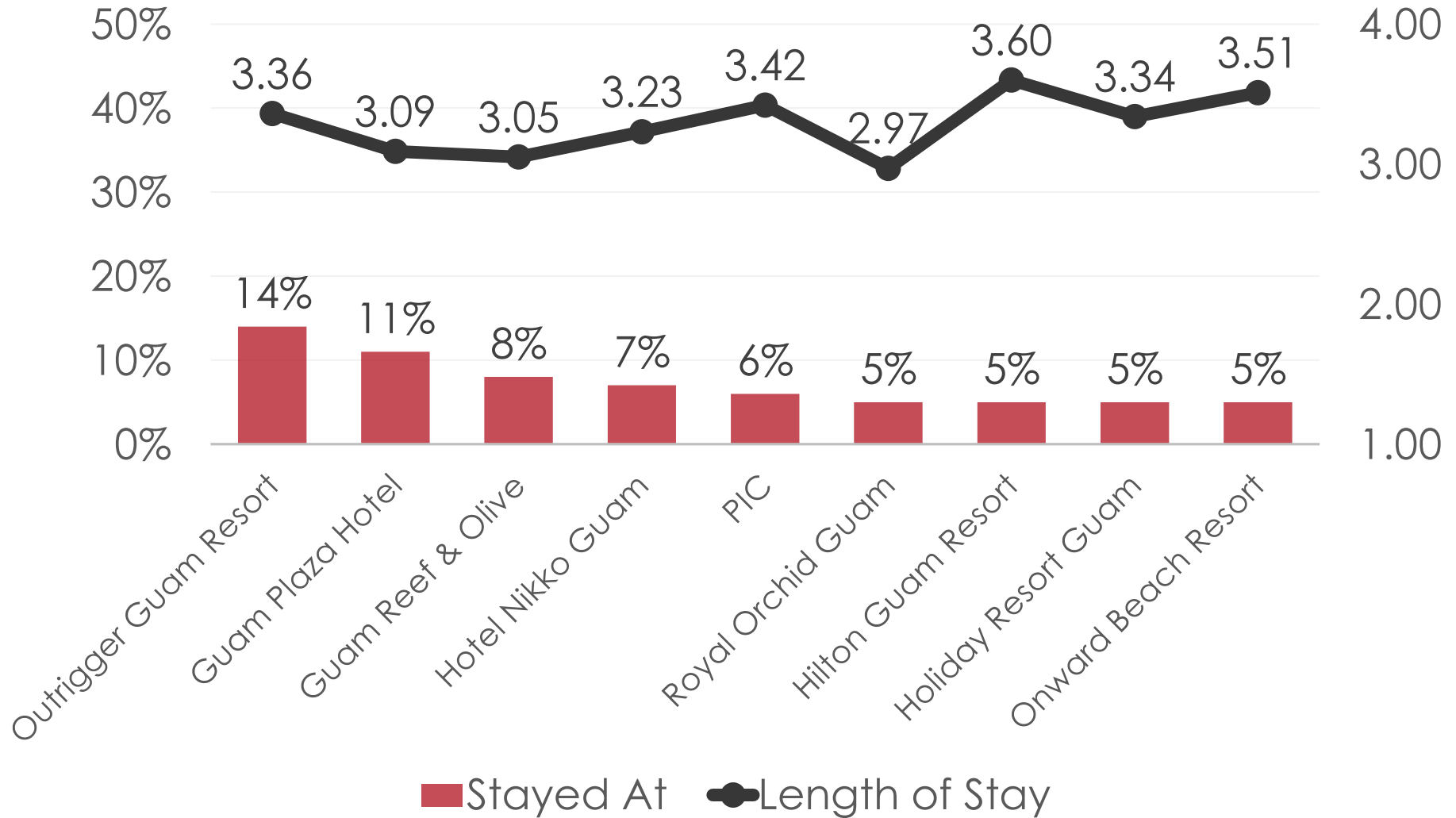
Prepaid Package Tour



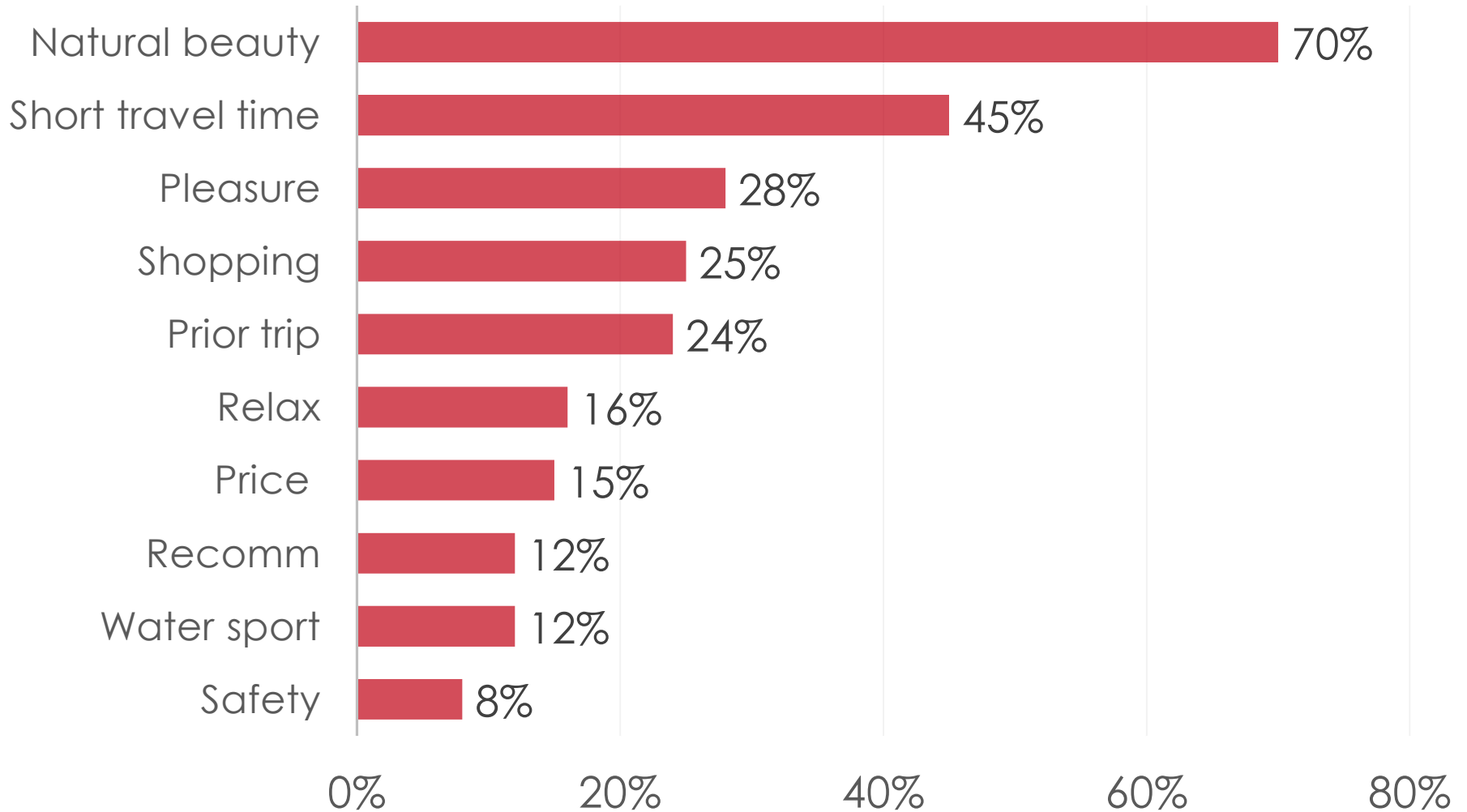
Prepaid Package Tour



Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Top 3

FY2017	FY2018
60% Natural beauty 40% Short travel time 28% Pleasure 28% Prior trip	70% Natural beauty 45% Short travel time 28% Pleasure

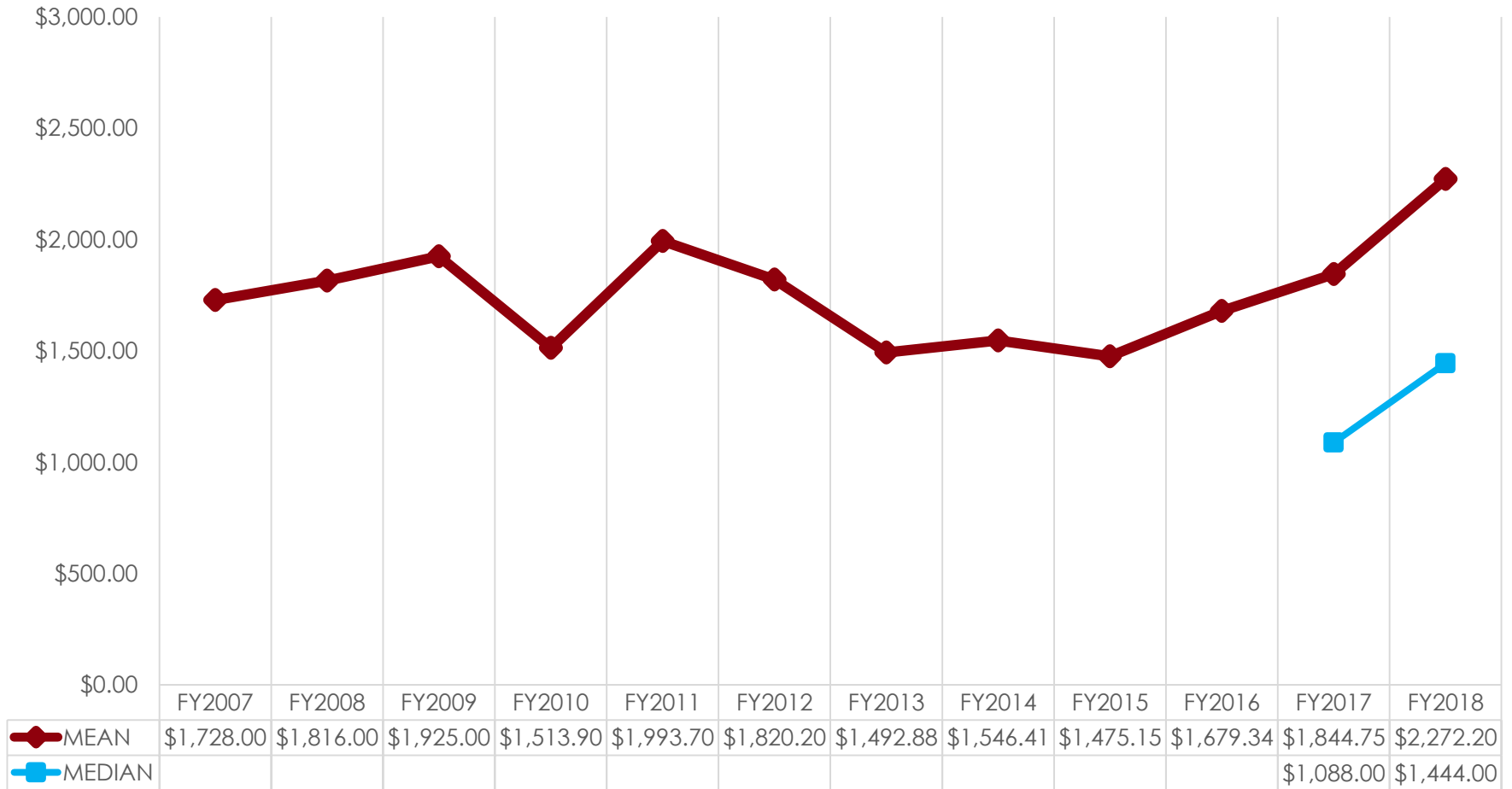
SECTION 3

EXPENDITURES

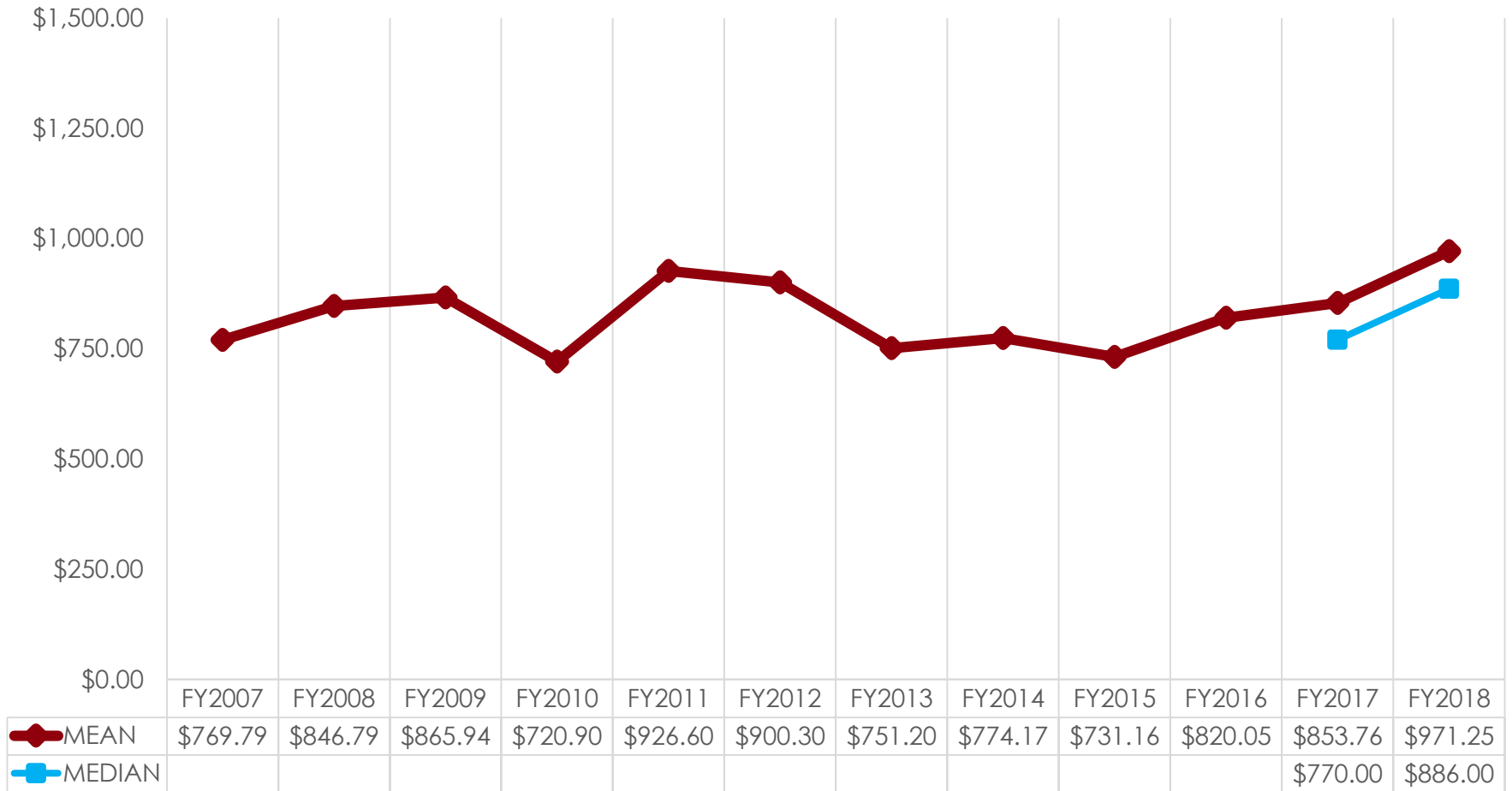
Prepaid Expenditures

- \$2,272.20 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$971.25 = overall mean average per person prepaid expenditures

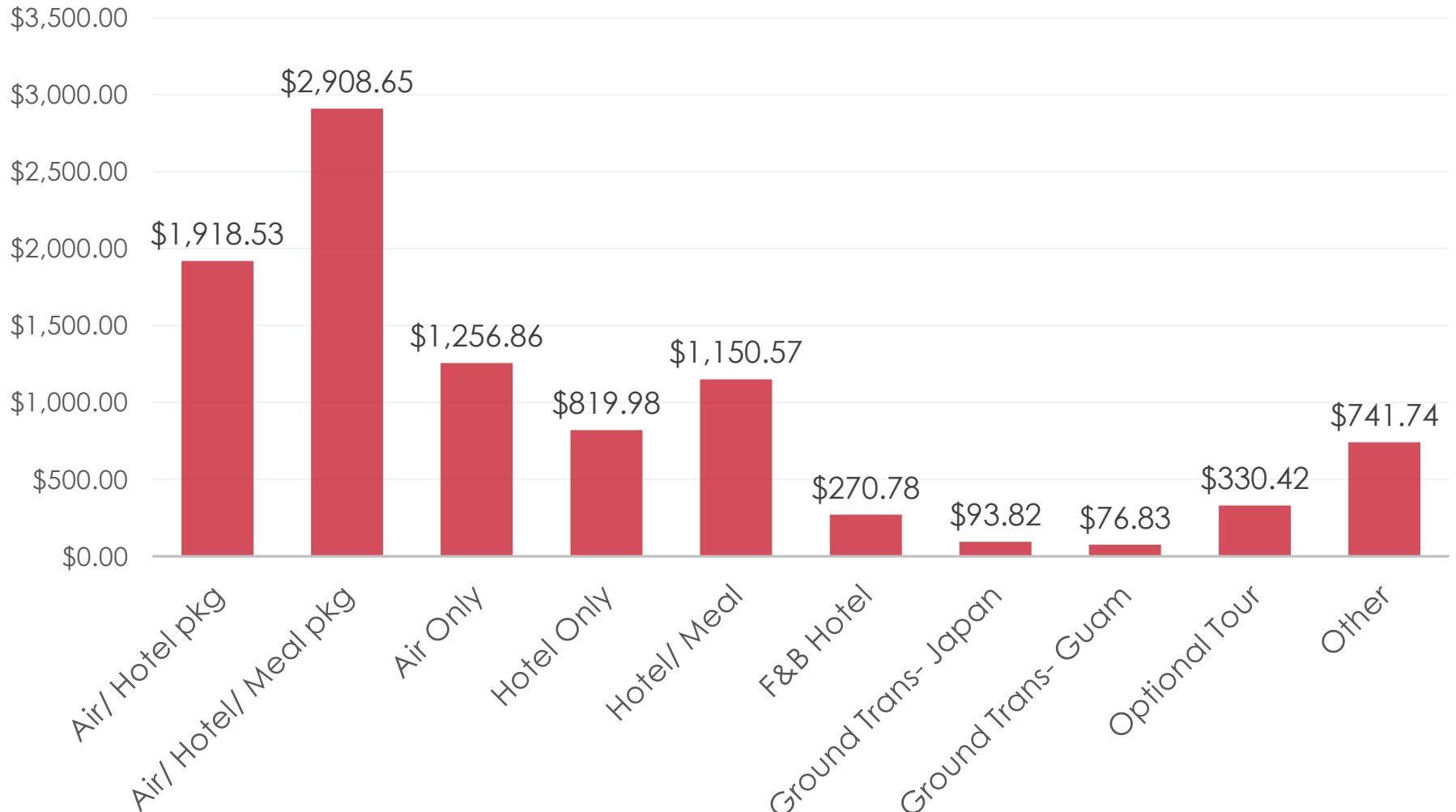
Prepaid Entire Travel Party – Tracking



Prepaid Per Person – Tracking

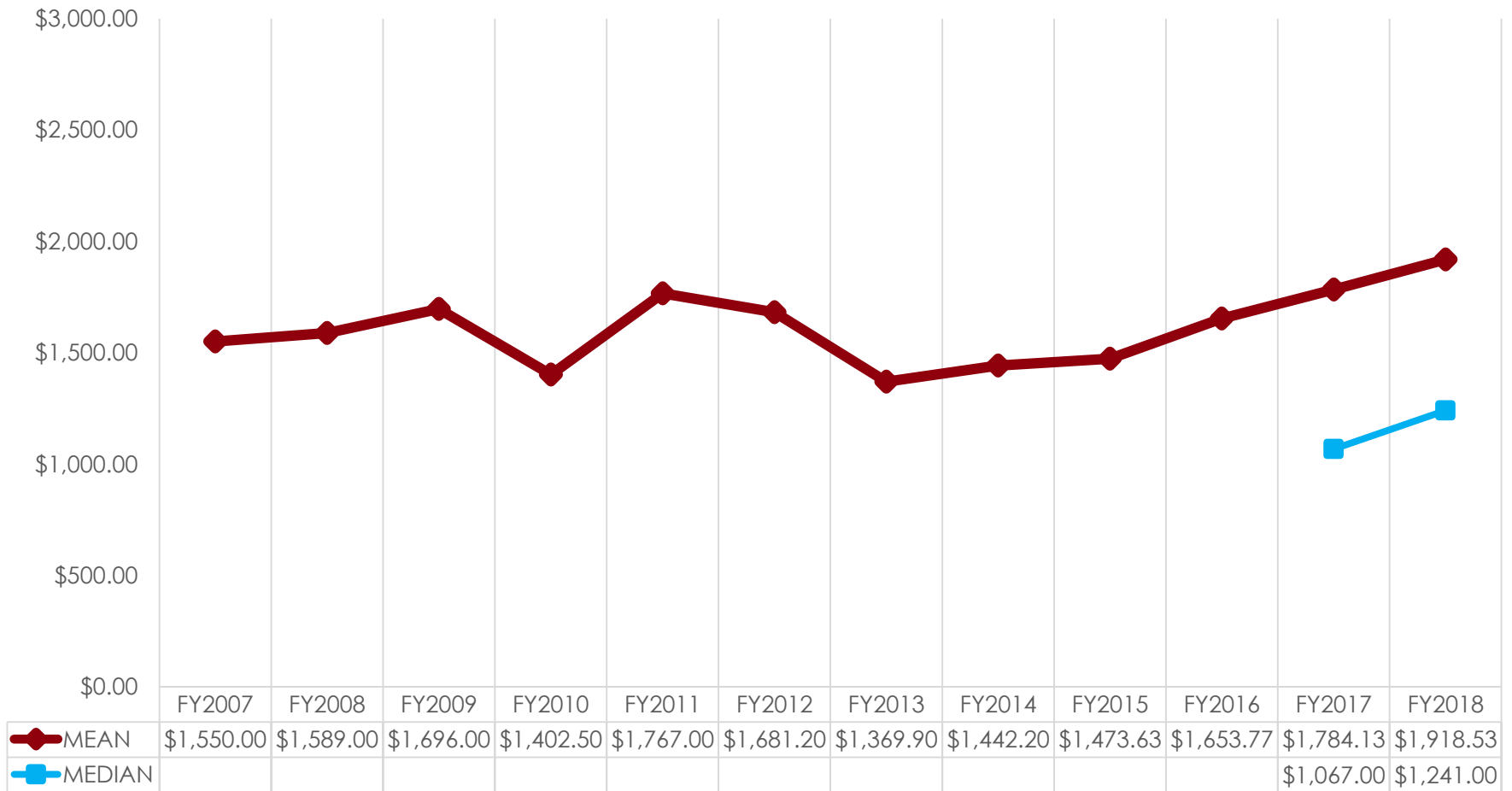


Prepaid Expenses by Category – Mean Entire Travel Party



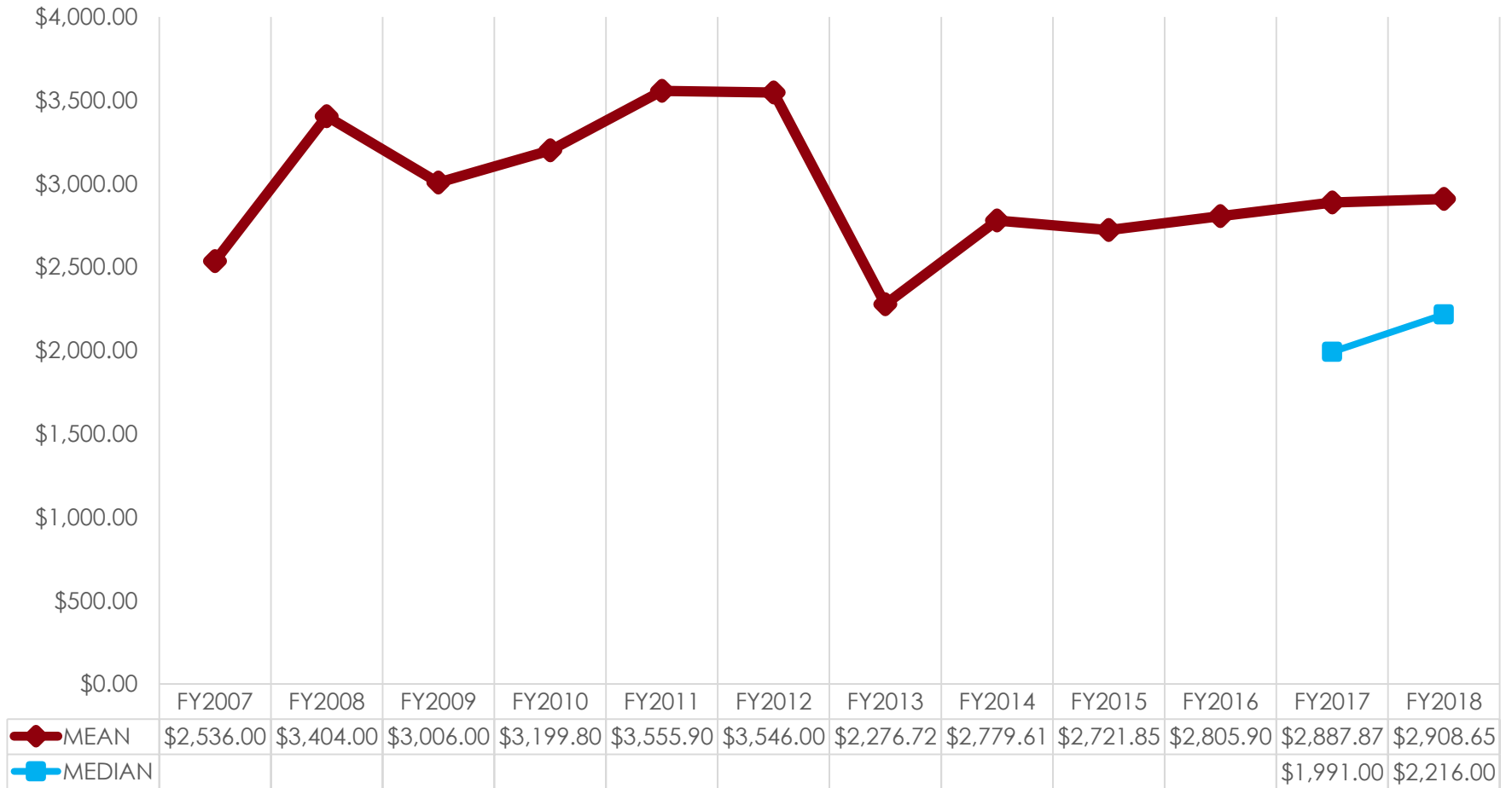
Prepaid – Tracking

Airfare & Accommodation Packages

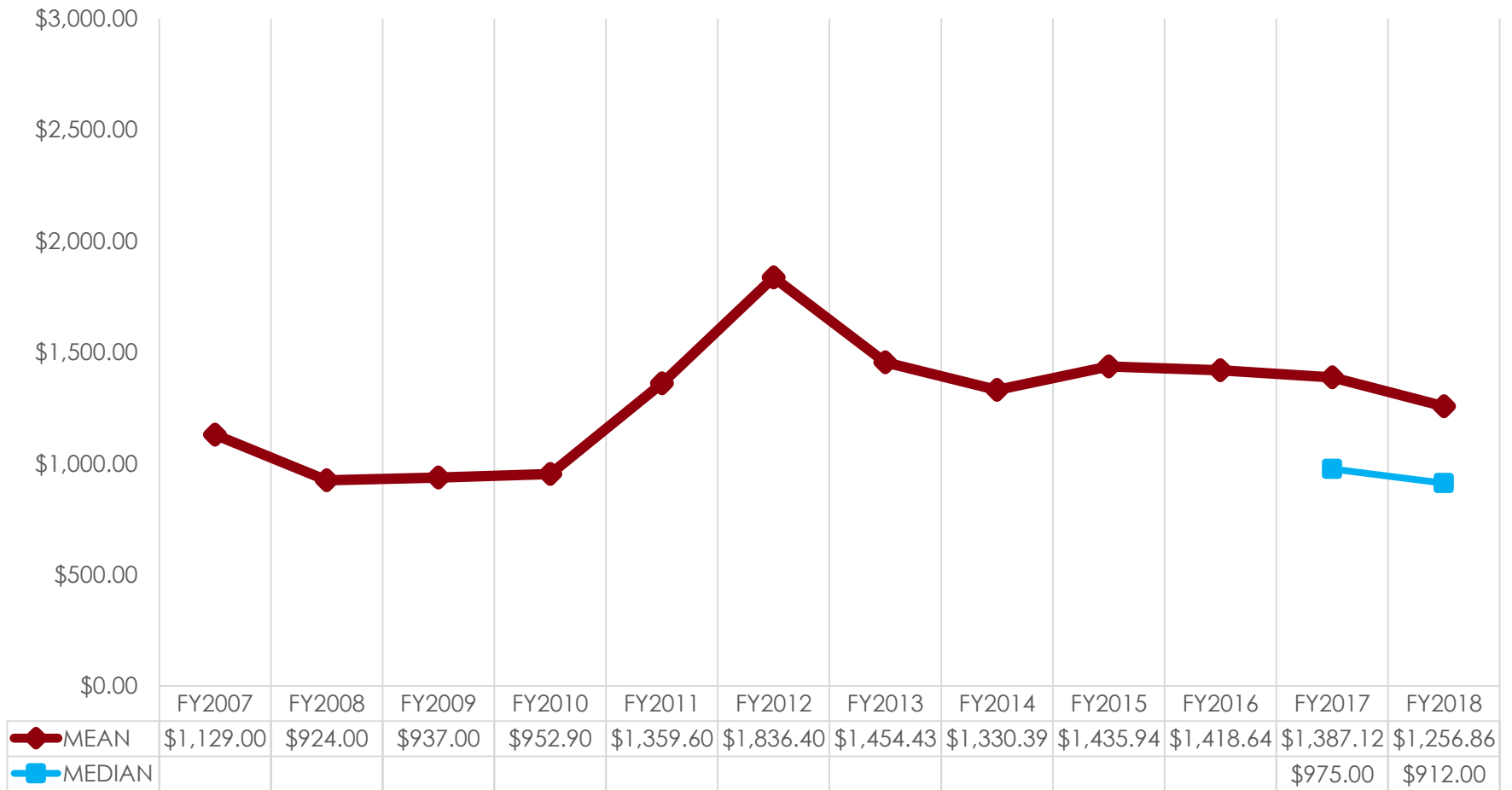


Prepaid – Tracking

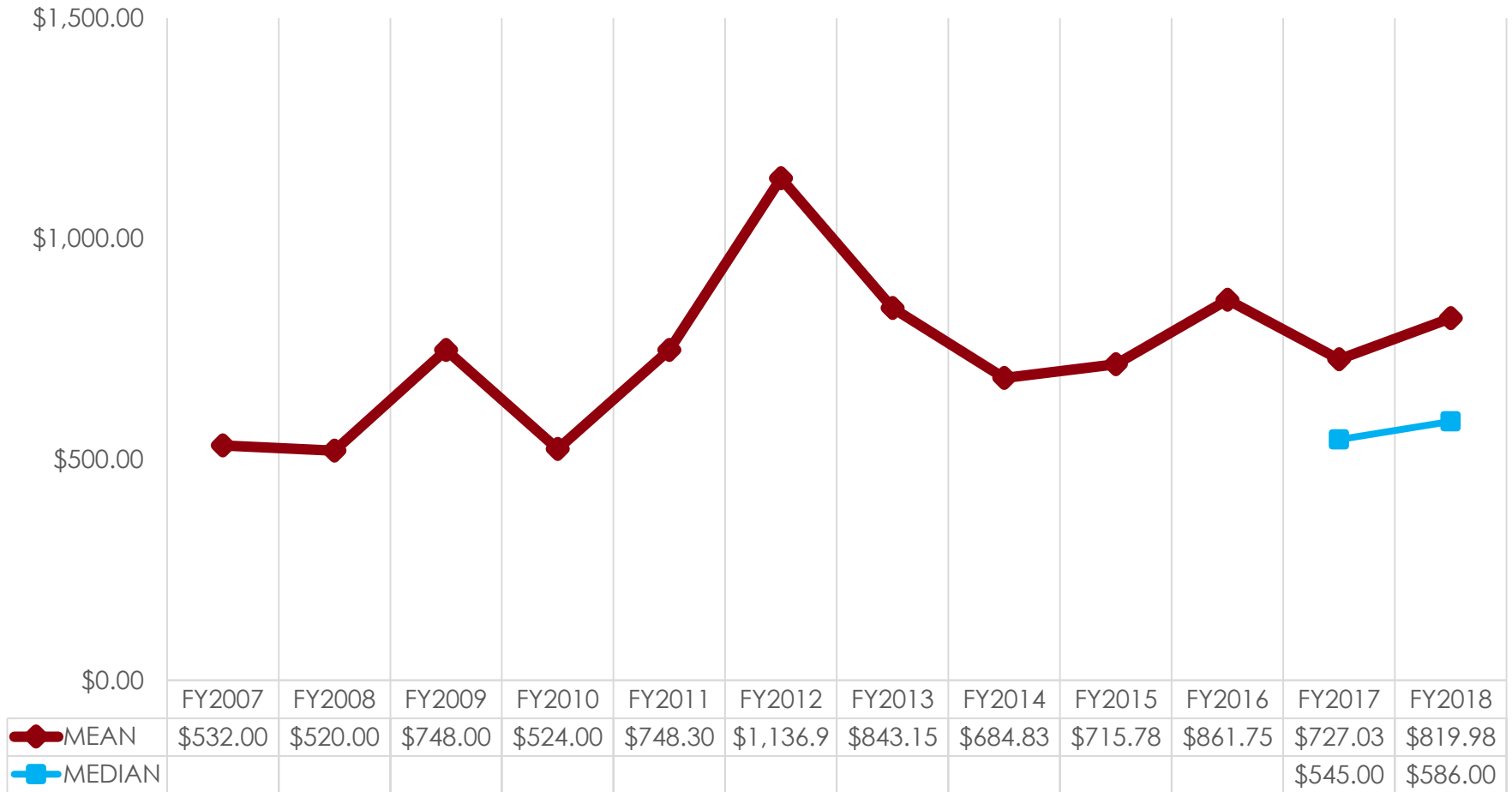
Airfare & Accommodation W/ Meal Packages



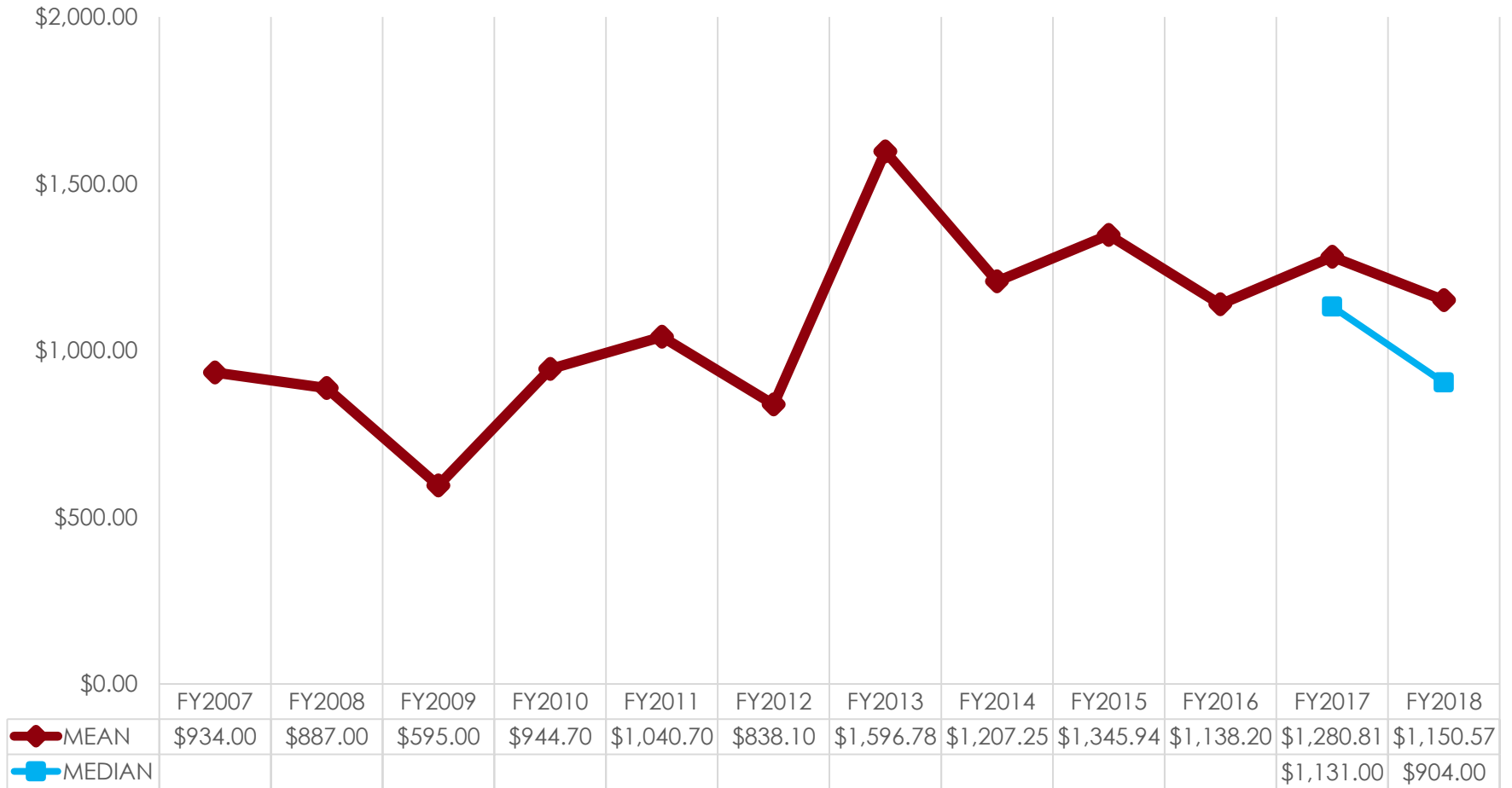
Prepaid – Tracking Airfare Only



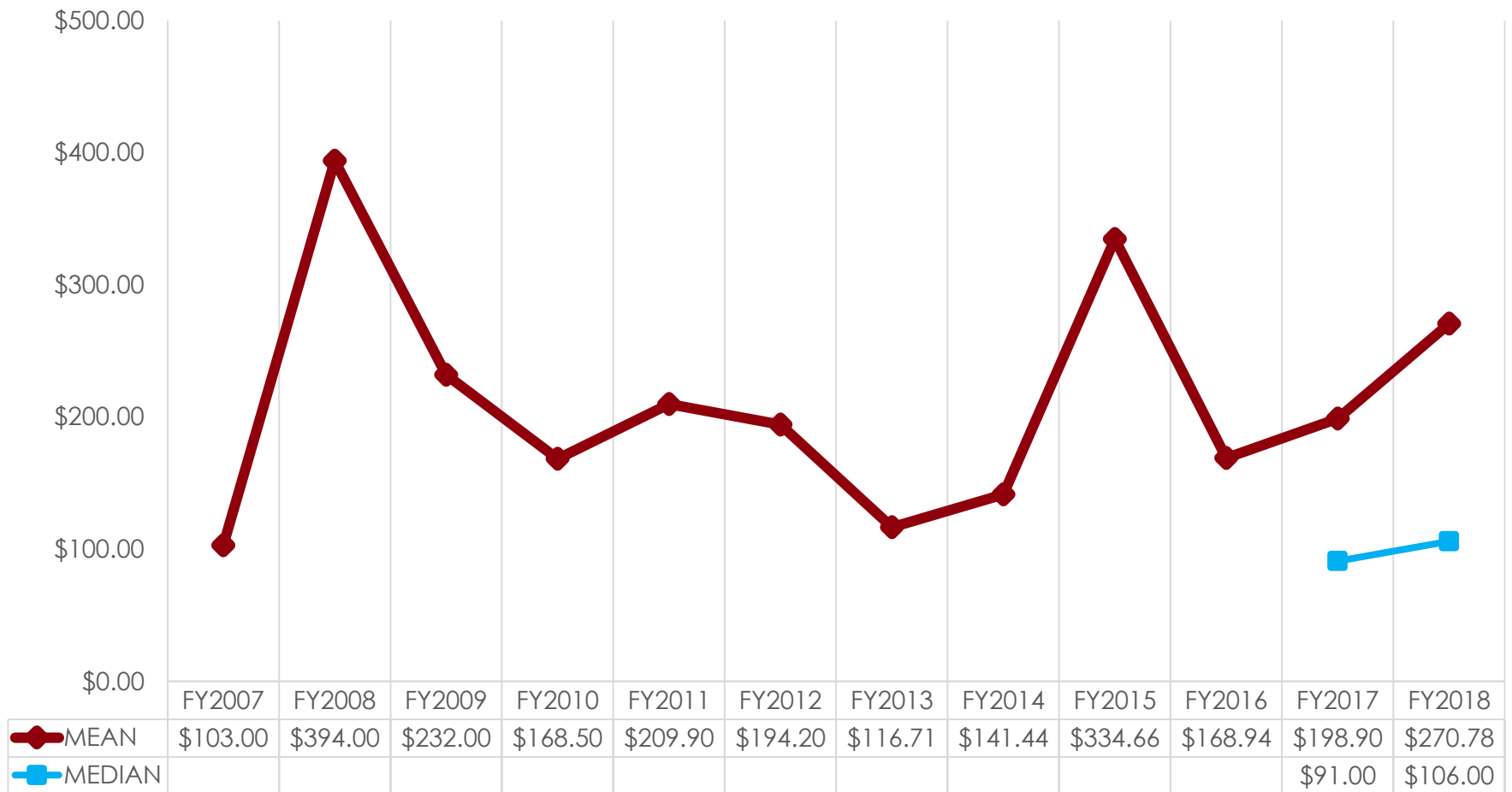
Prepaid – Tracking Accommodations Only



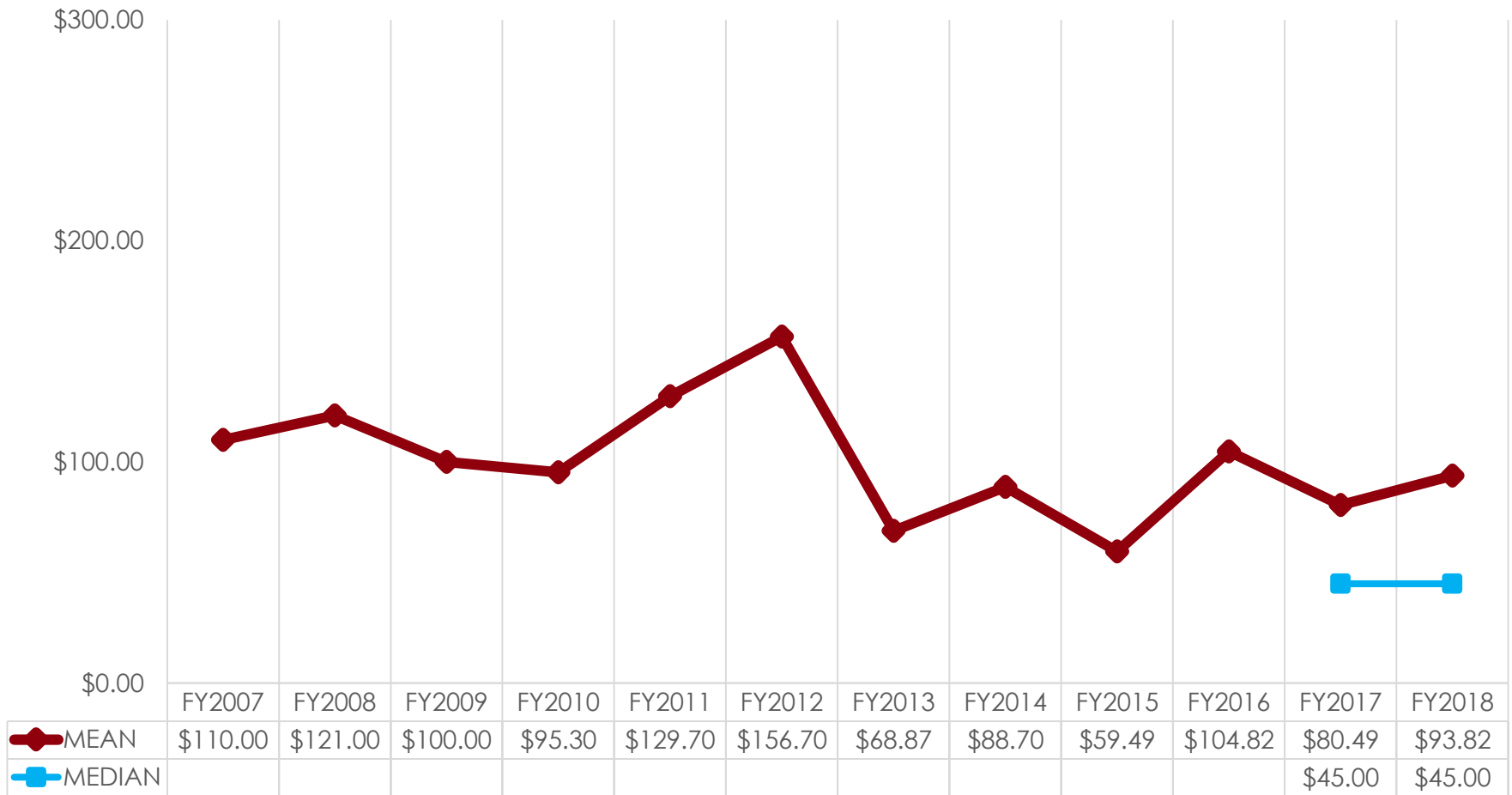
Prepaid – Tracking Accommodations w/ Meal Only



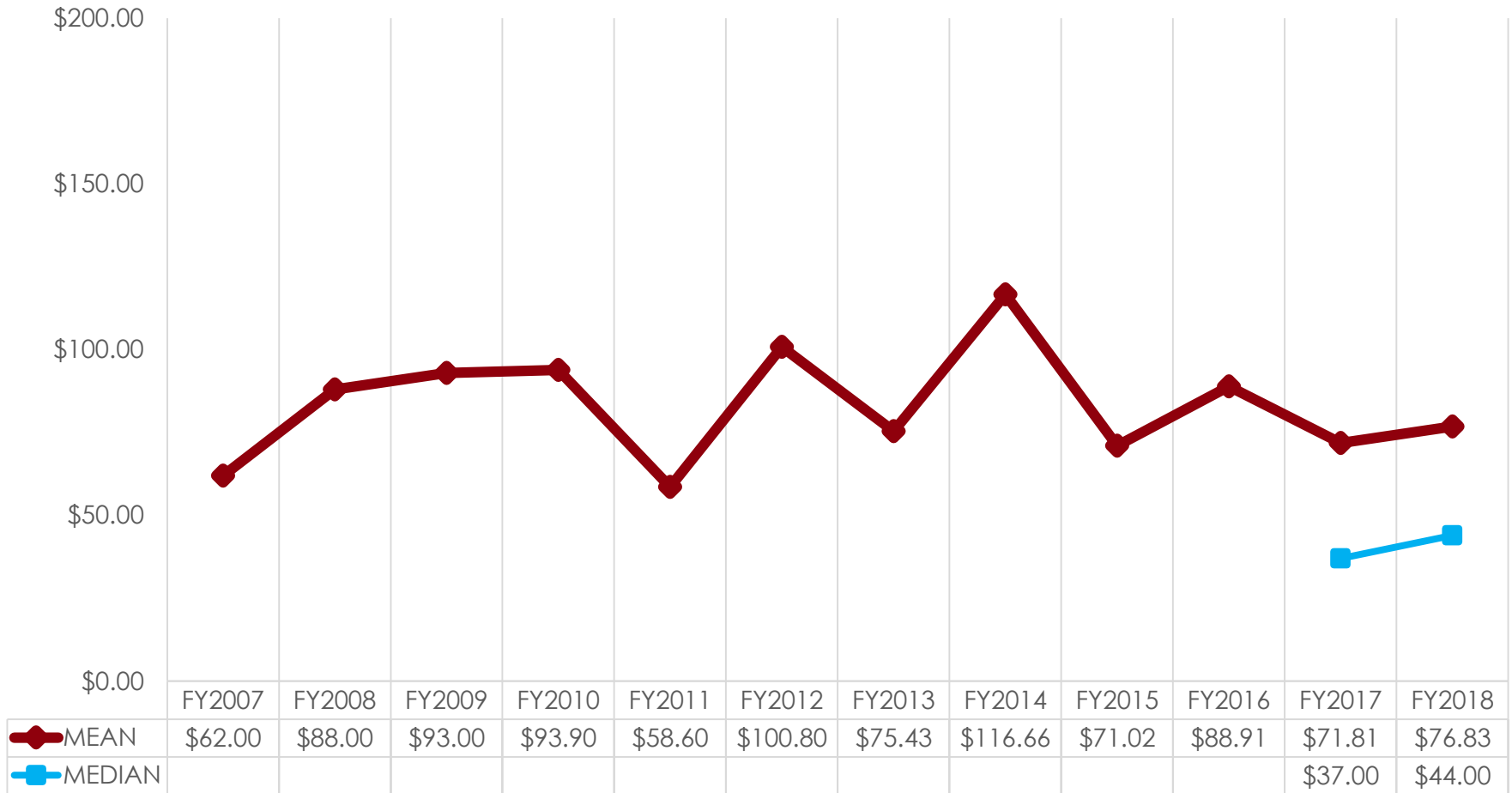
Prepaid – Tracking Food & Beverage in Hotel



Prepaid – Tracking Ground Transportation - Japan

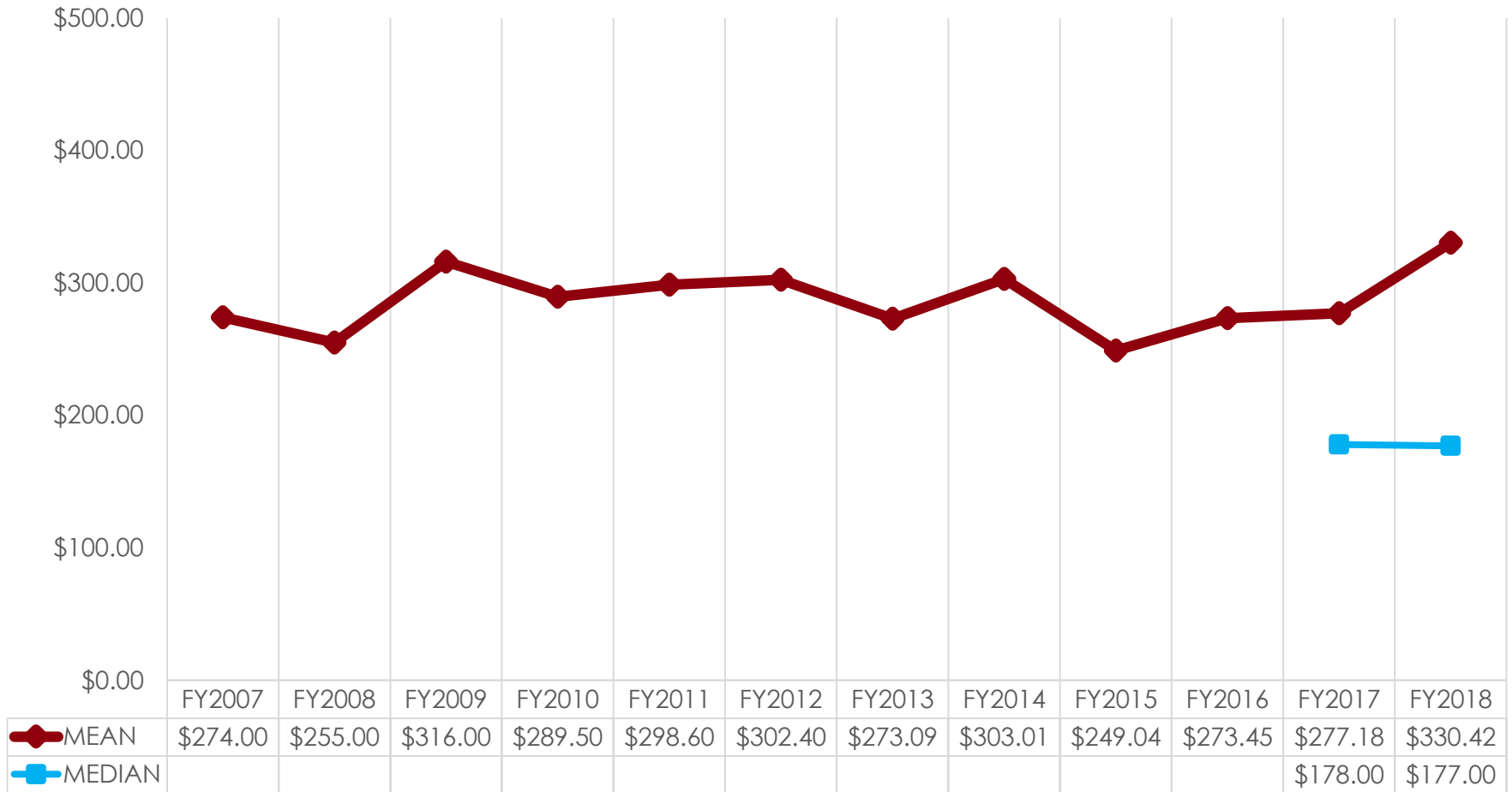


Prepaid – Tracking Ground Transportation - Guam



Prepaid – Tracking

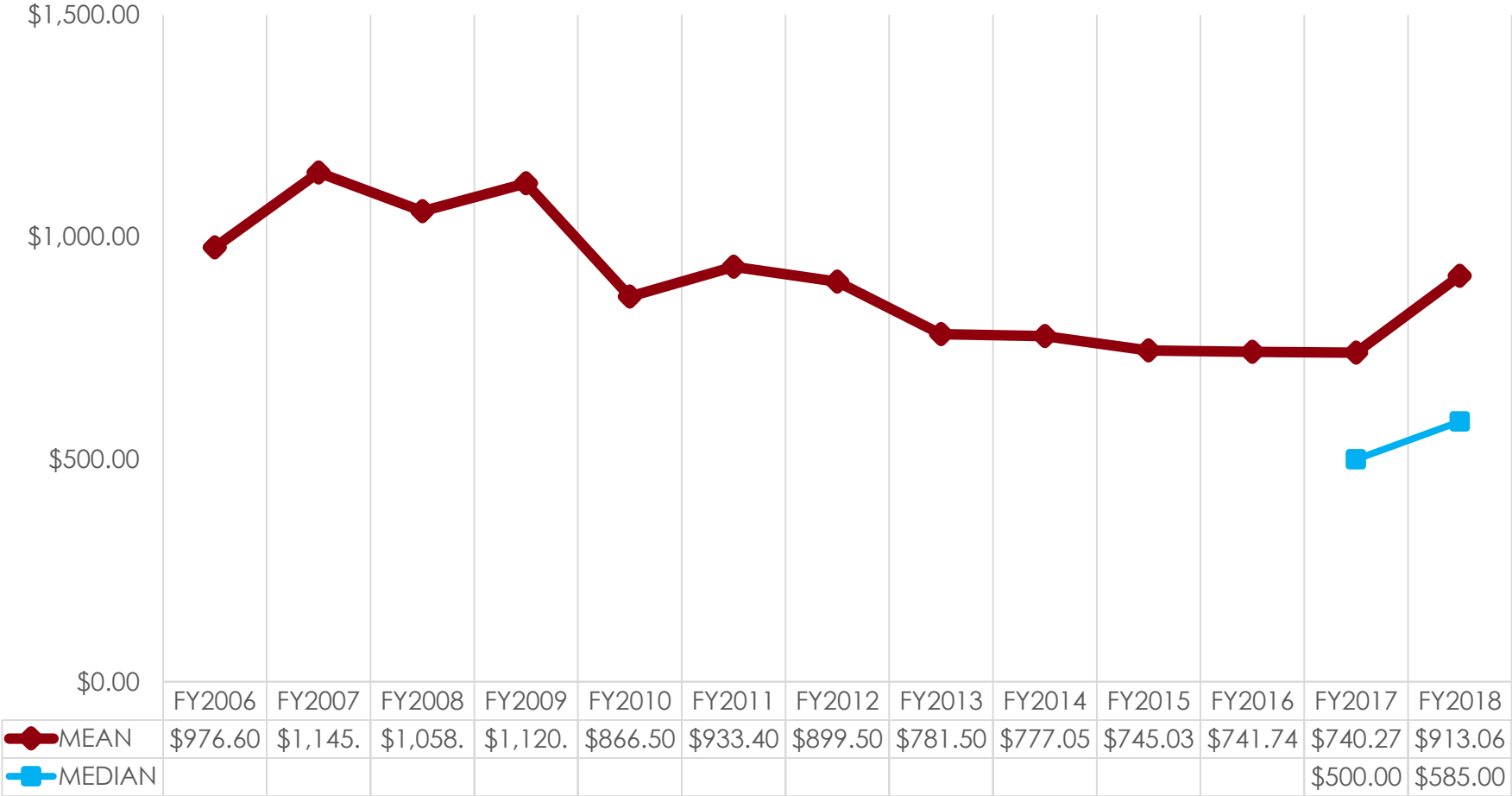
Optional tours/ Activities



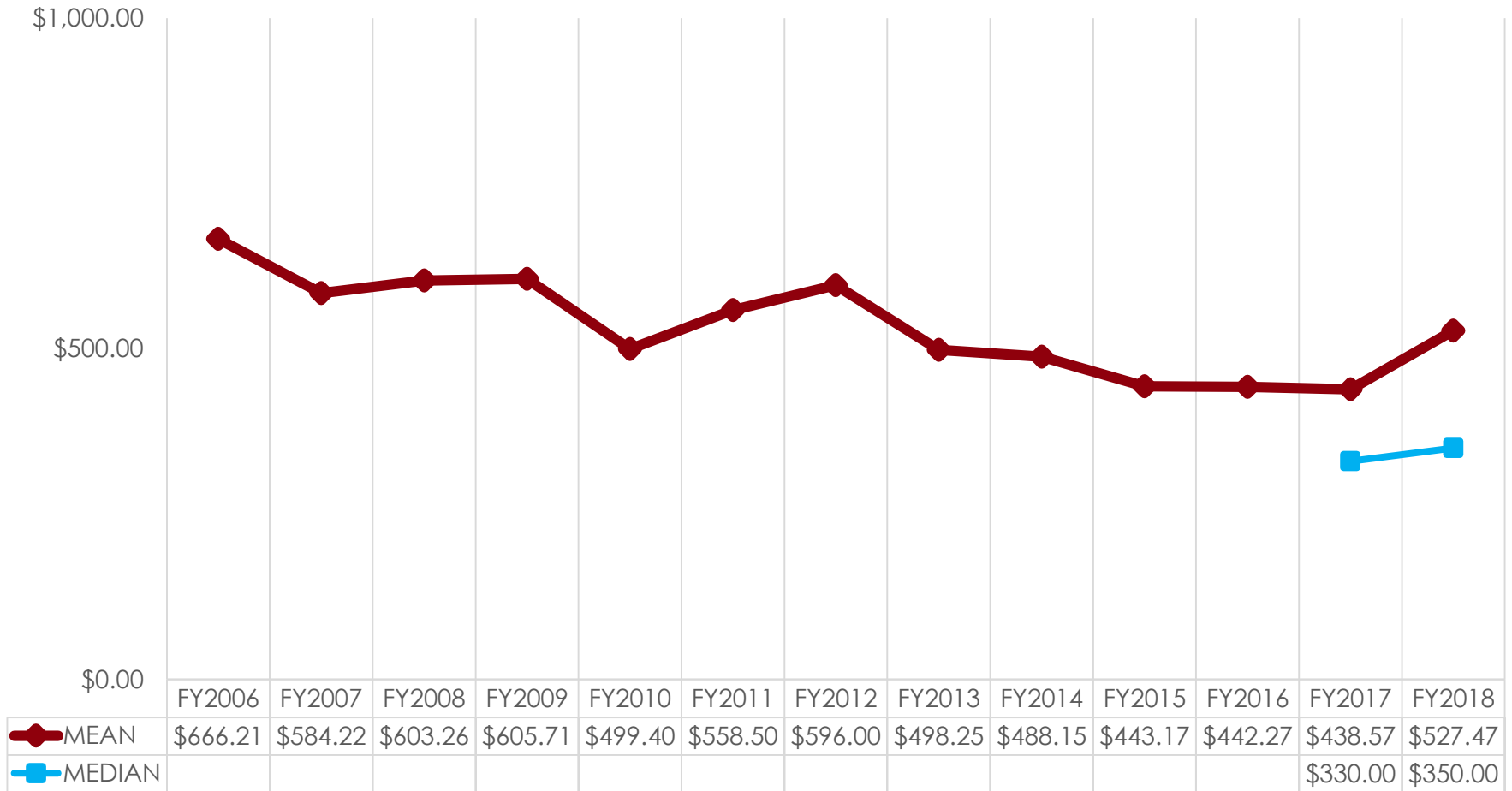
On-Island Expenditures

- \$913.06 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$527.47 = overall mean average per person prepaid expenditures

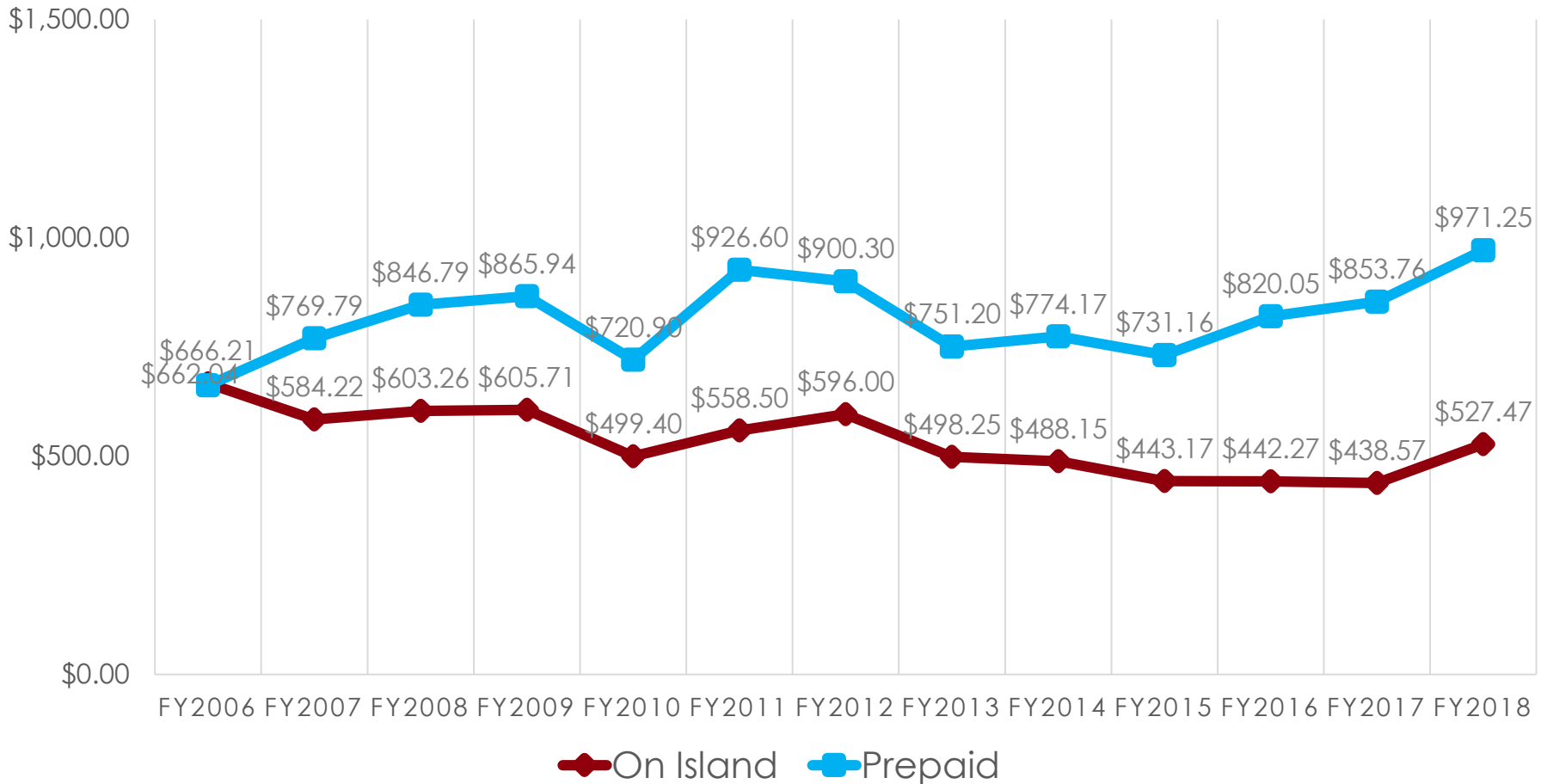
On-Island Entire Travel Party – Tracking



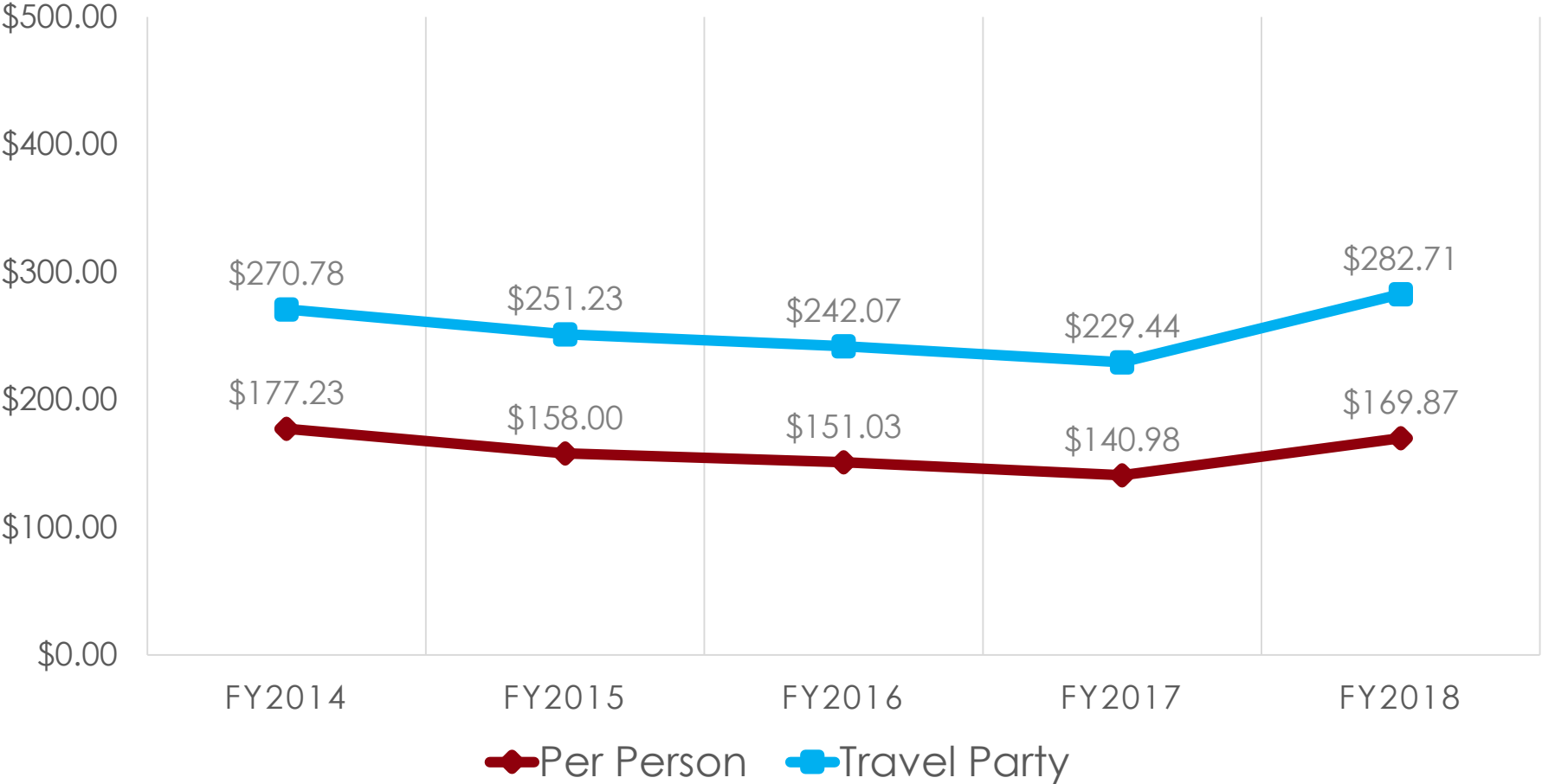
On-Island Per Person – Tracking



Per Person MEAN expenditures – Tracking On-Island/ Prepaid



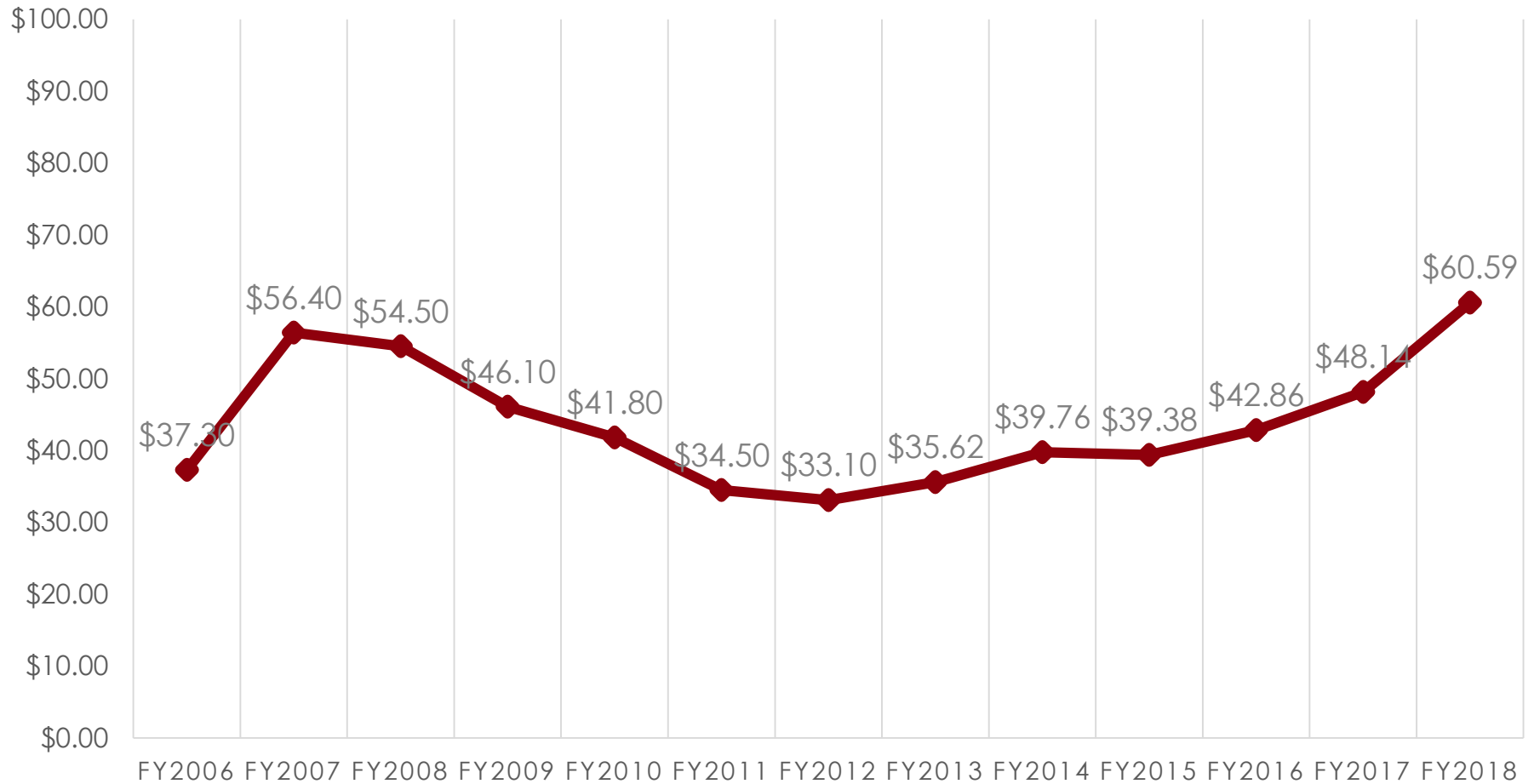
On-Island Per Day Spending – Tracking Mean



On-Island Expenses by Category – Mean Entire Travel Party

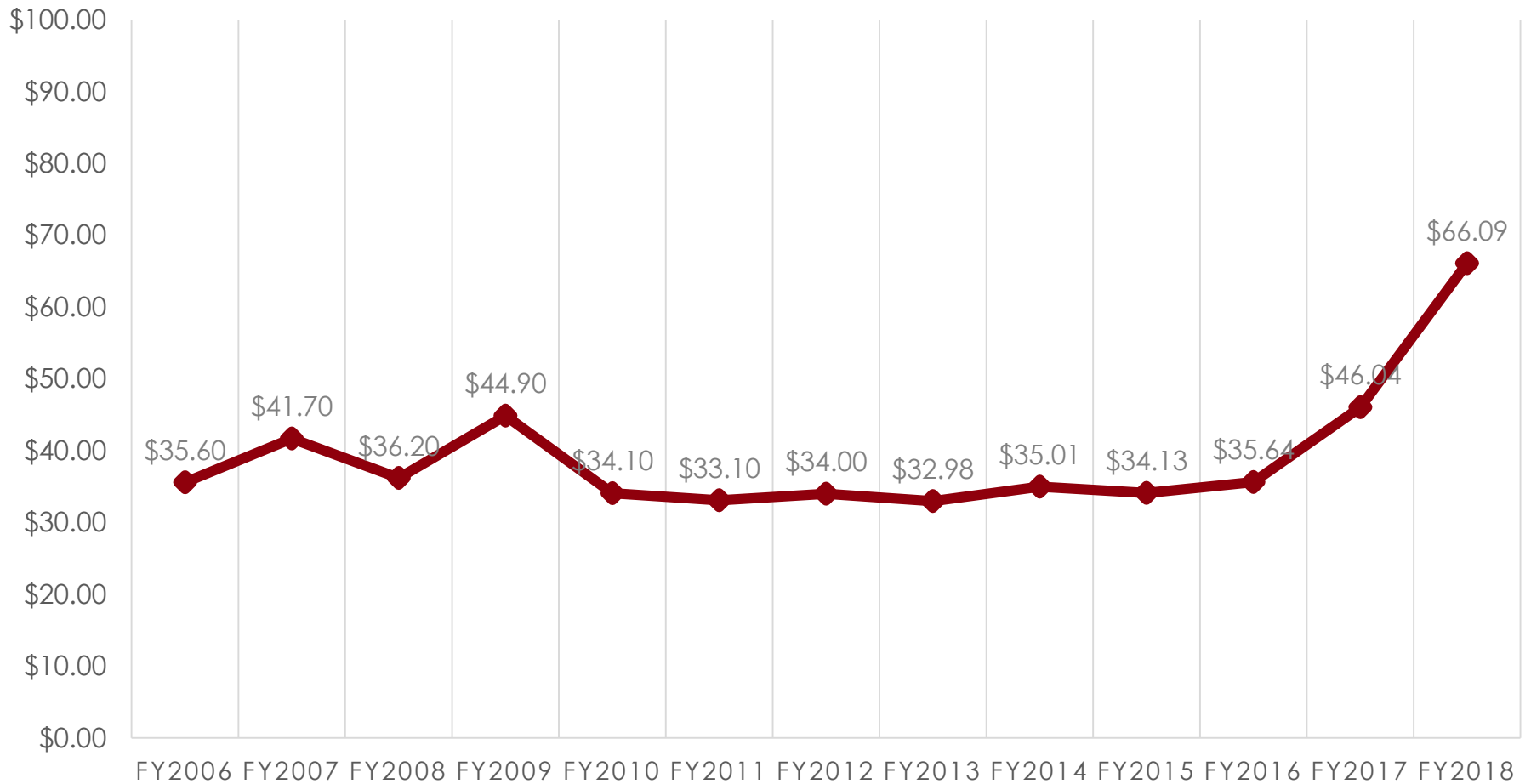


On-Island – Tracking Food & Beverage - Hotel



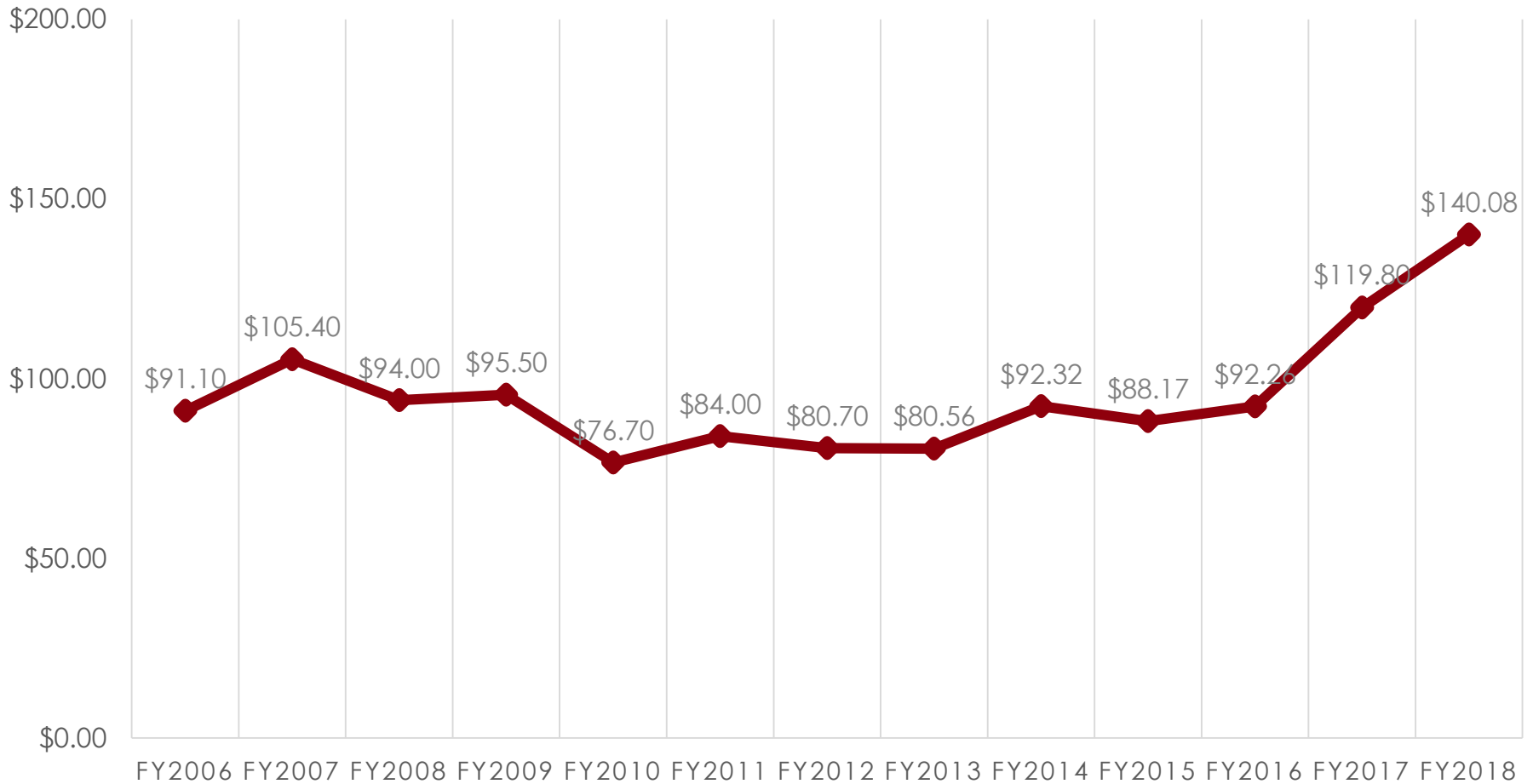
On-Island – Tracking

Food & Beverage – Fast Food/ Convenience Store

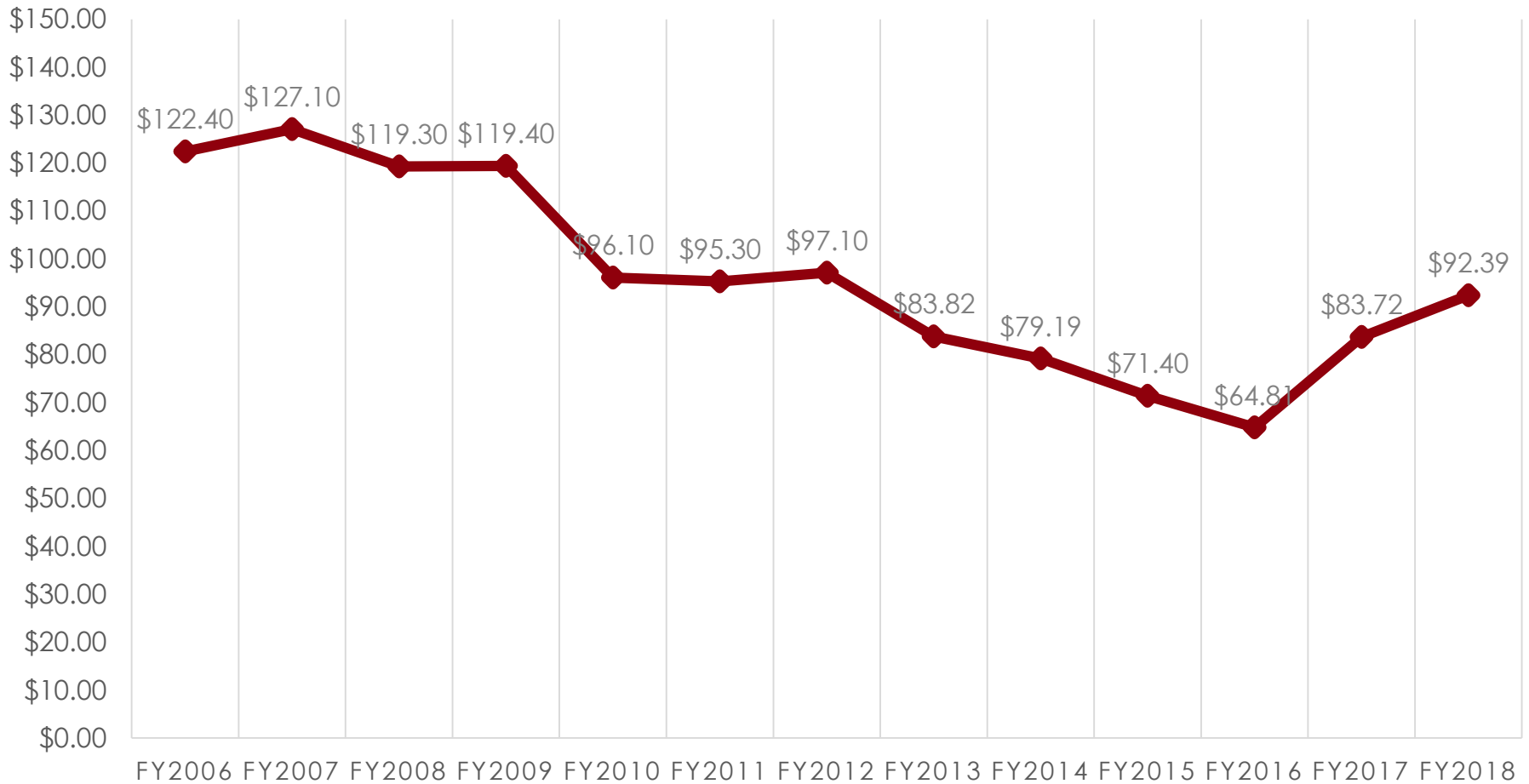


On-Island – Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel

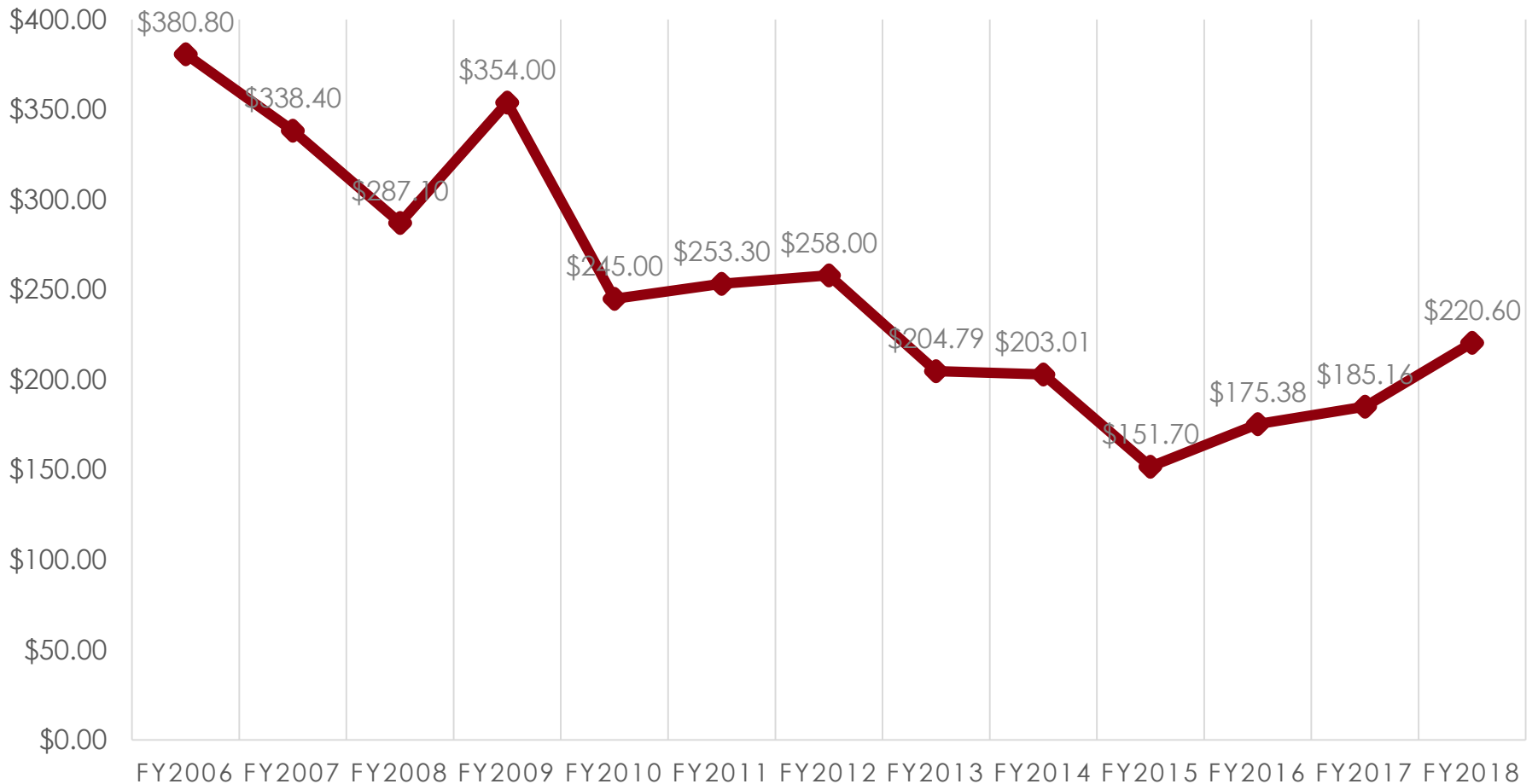


On-Island – Tracking Optional tour/ Activities

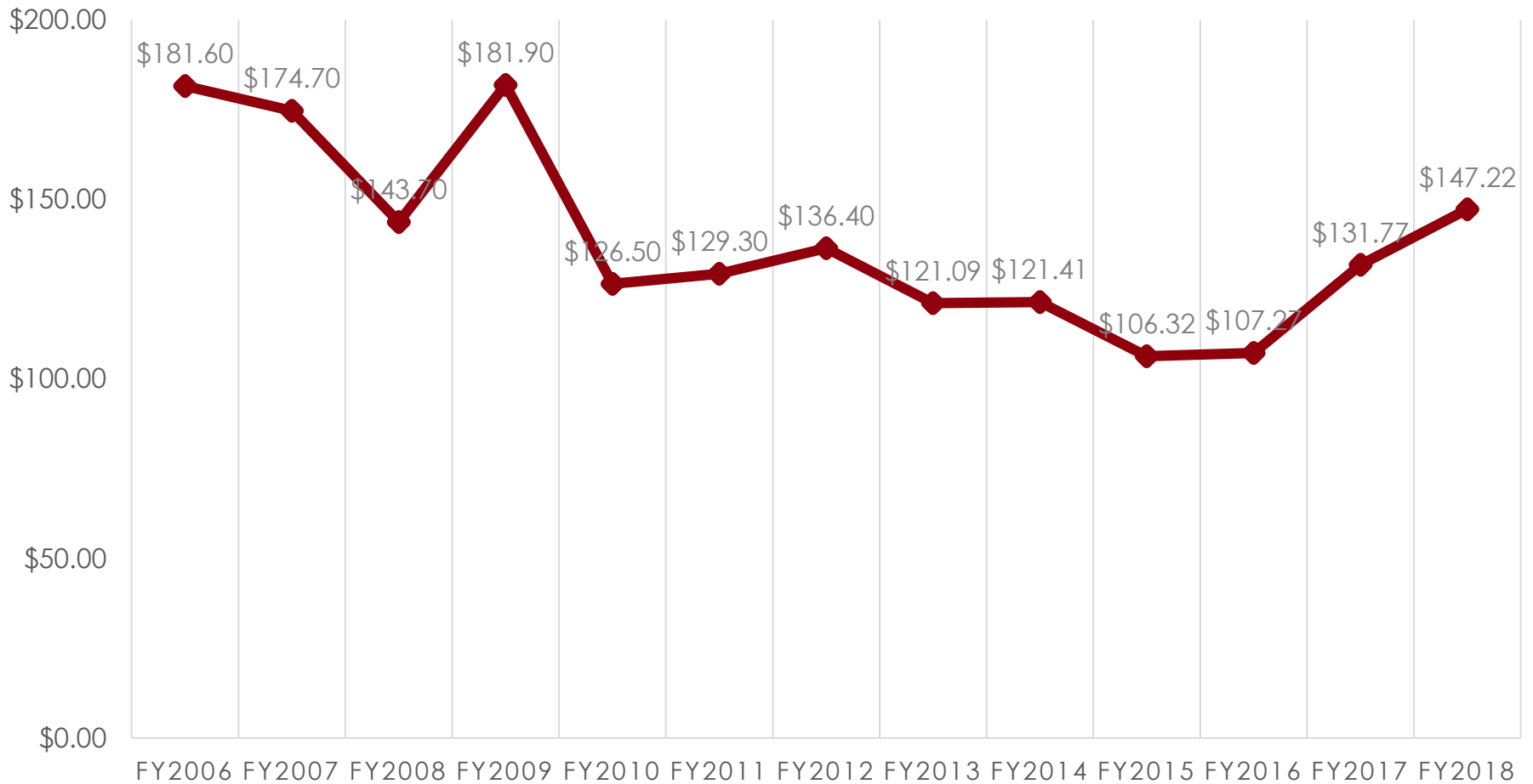


On-Island – Tracking

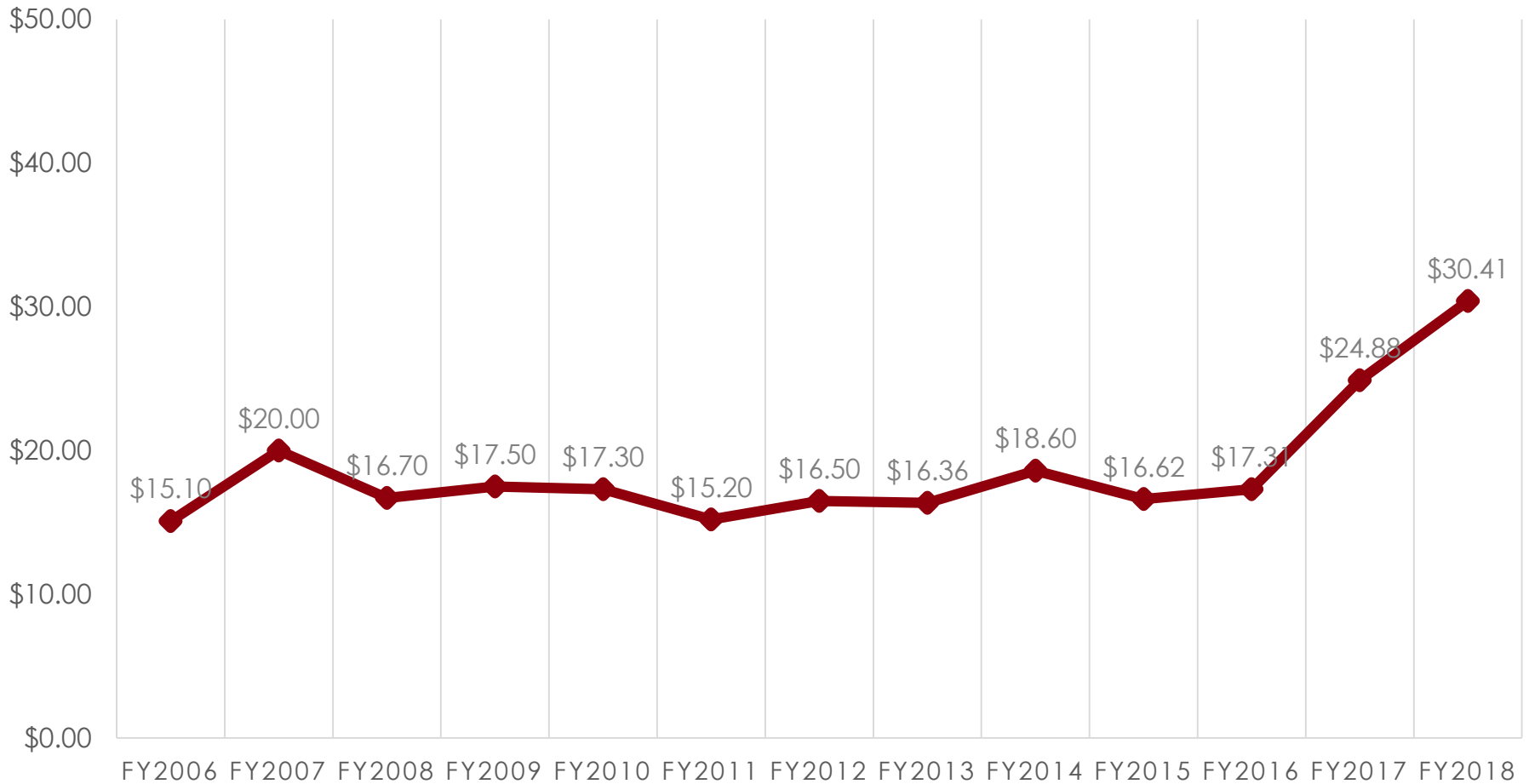
Gift/ Souvenir – Self/ Companion



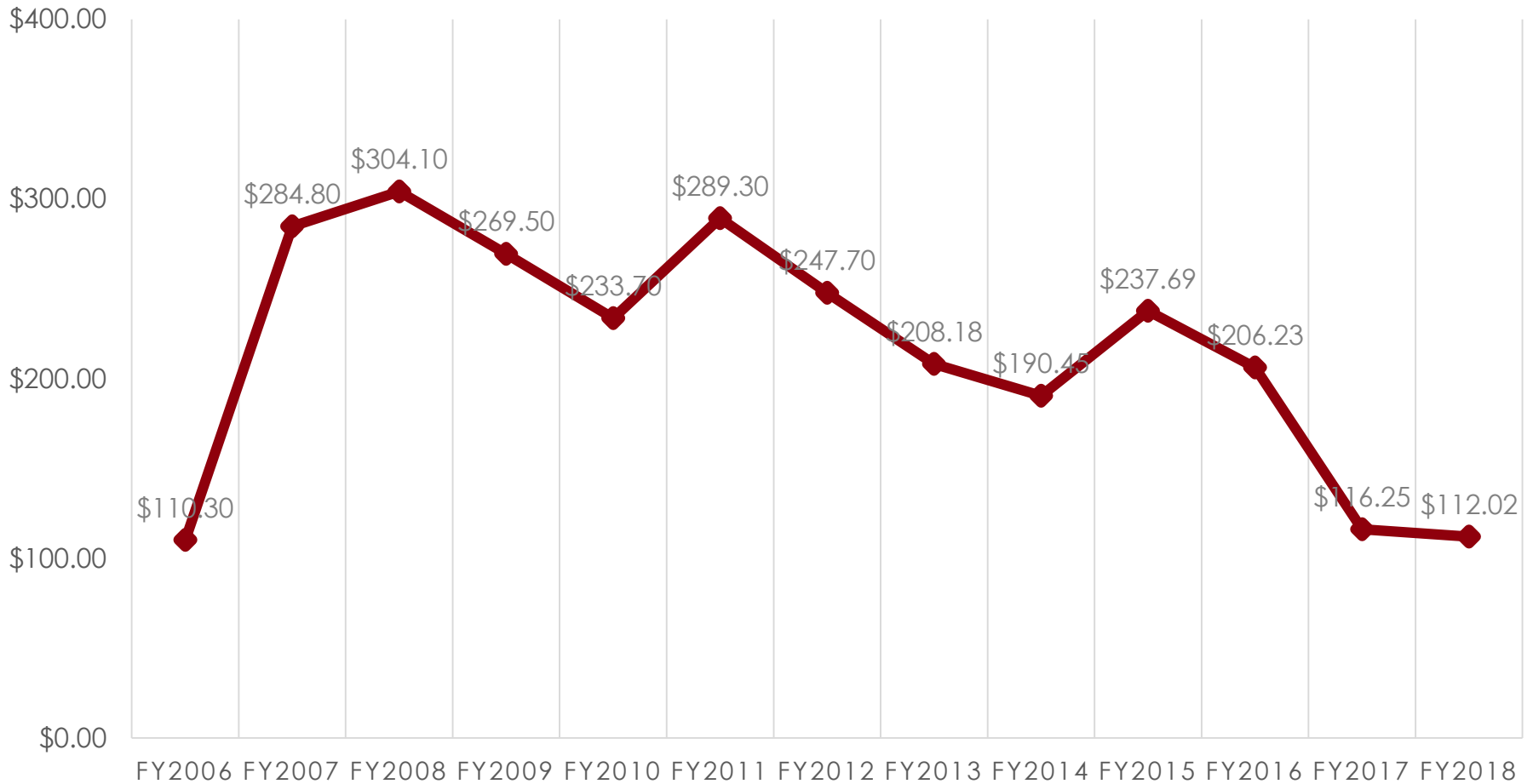
On-Island – Tracking Gift/ Souvenir – Friends/ Family



On-Island – Tracking Local Transportation



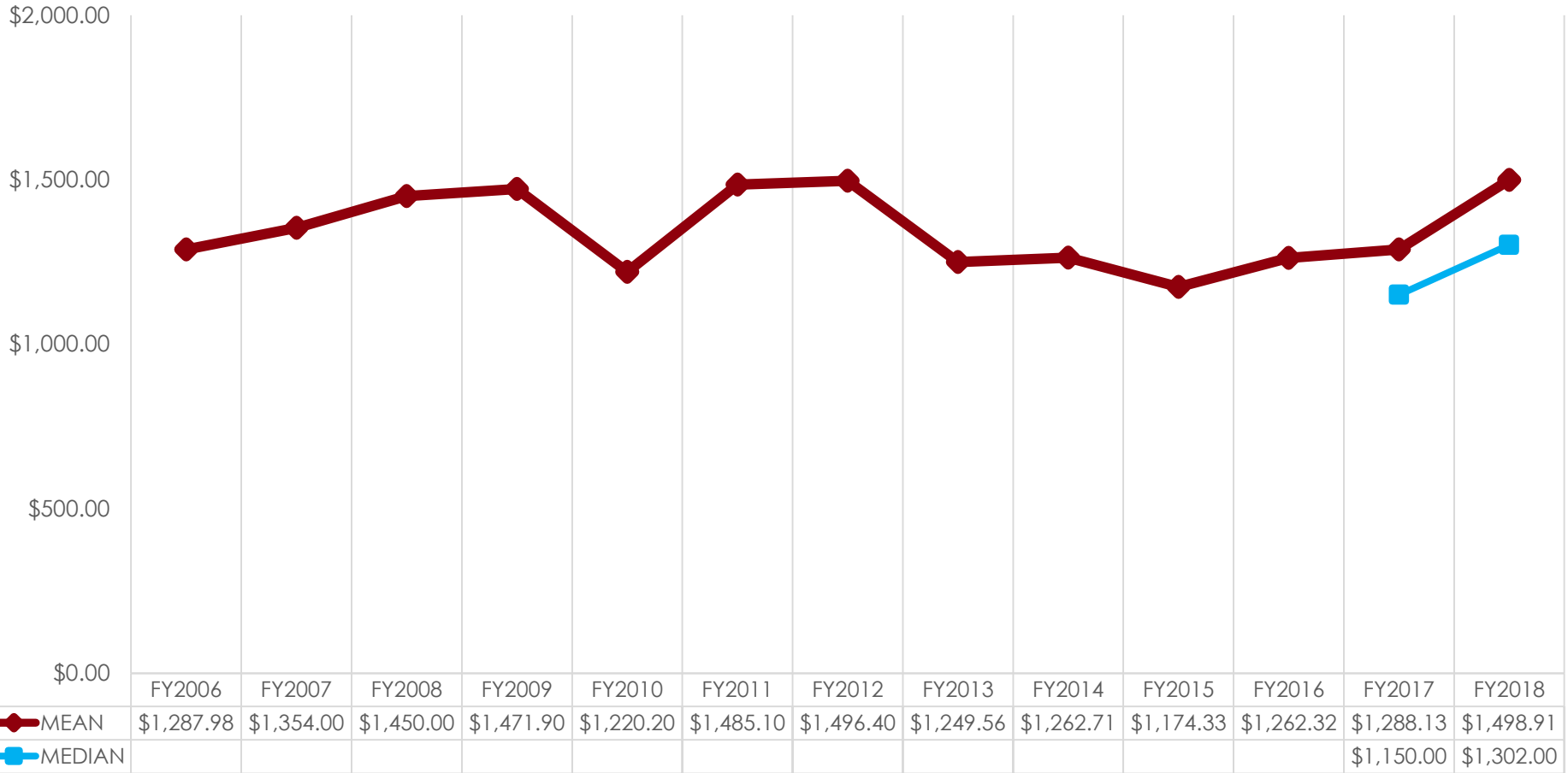
On-Island – Tracking Other Not Included



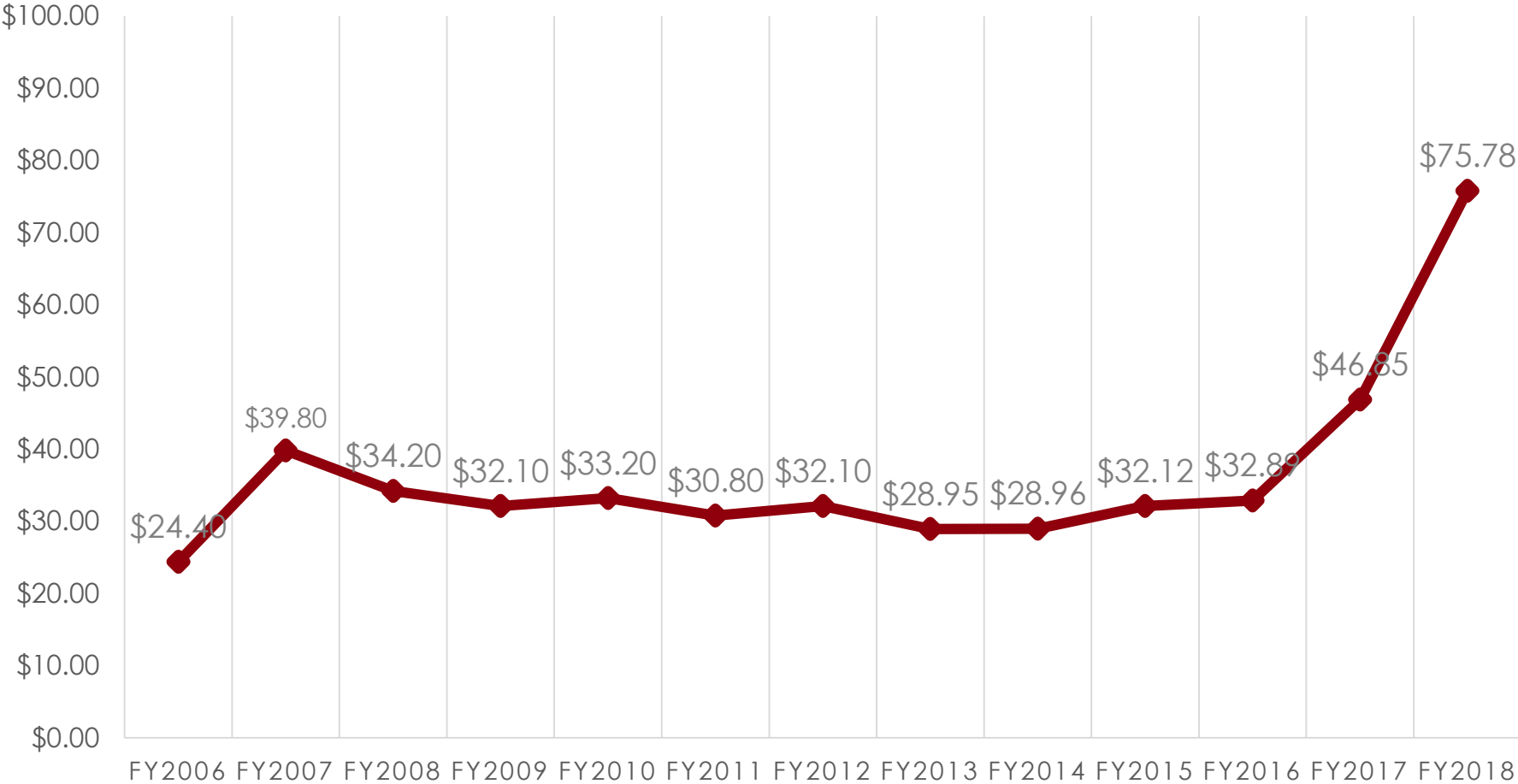
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,498.91 = TOTAL Per Person Expenditure

TOTAL Per Person Expenditures – Tracking



GUAM AIRPORT EXPENDITURE – Tracking

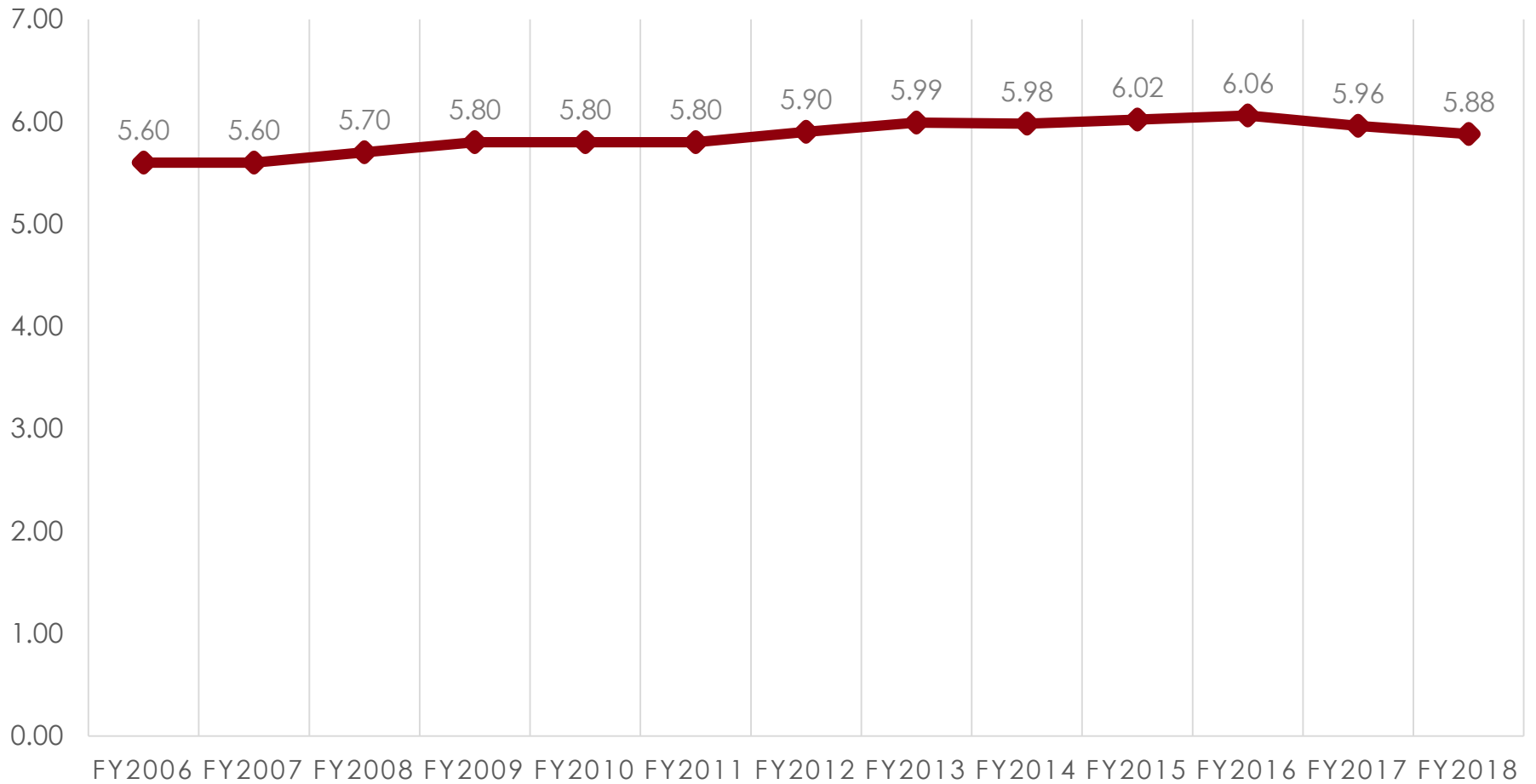


SECTION 4

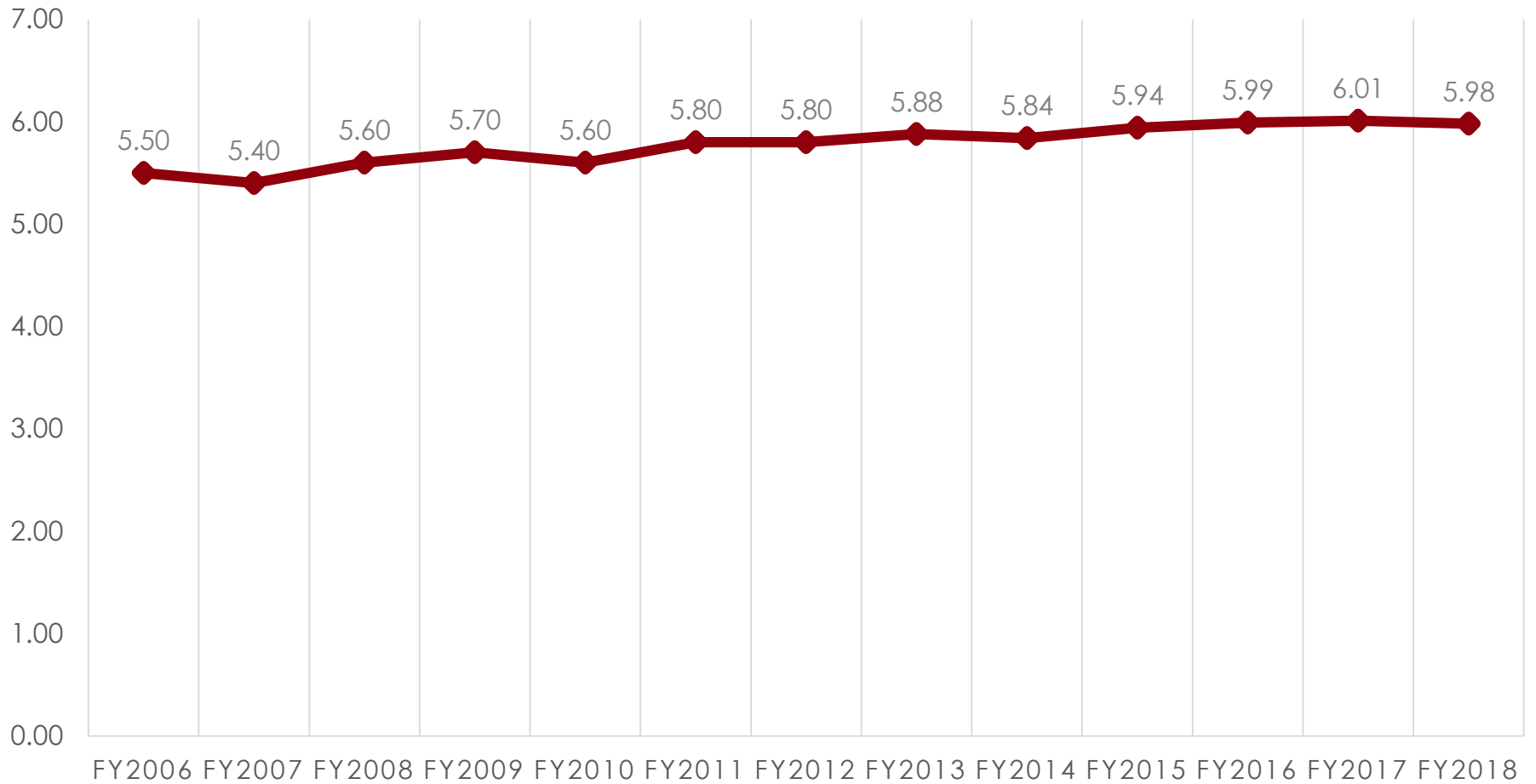
VISITOR SATISFACTION

BEHAVIOR

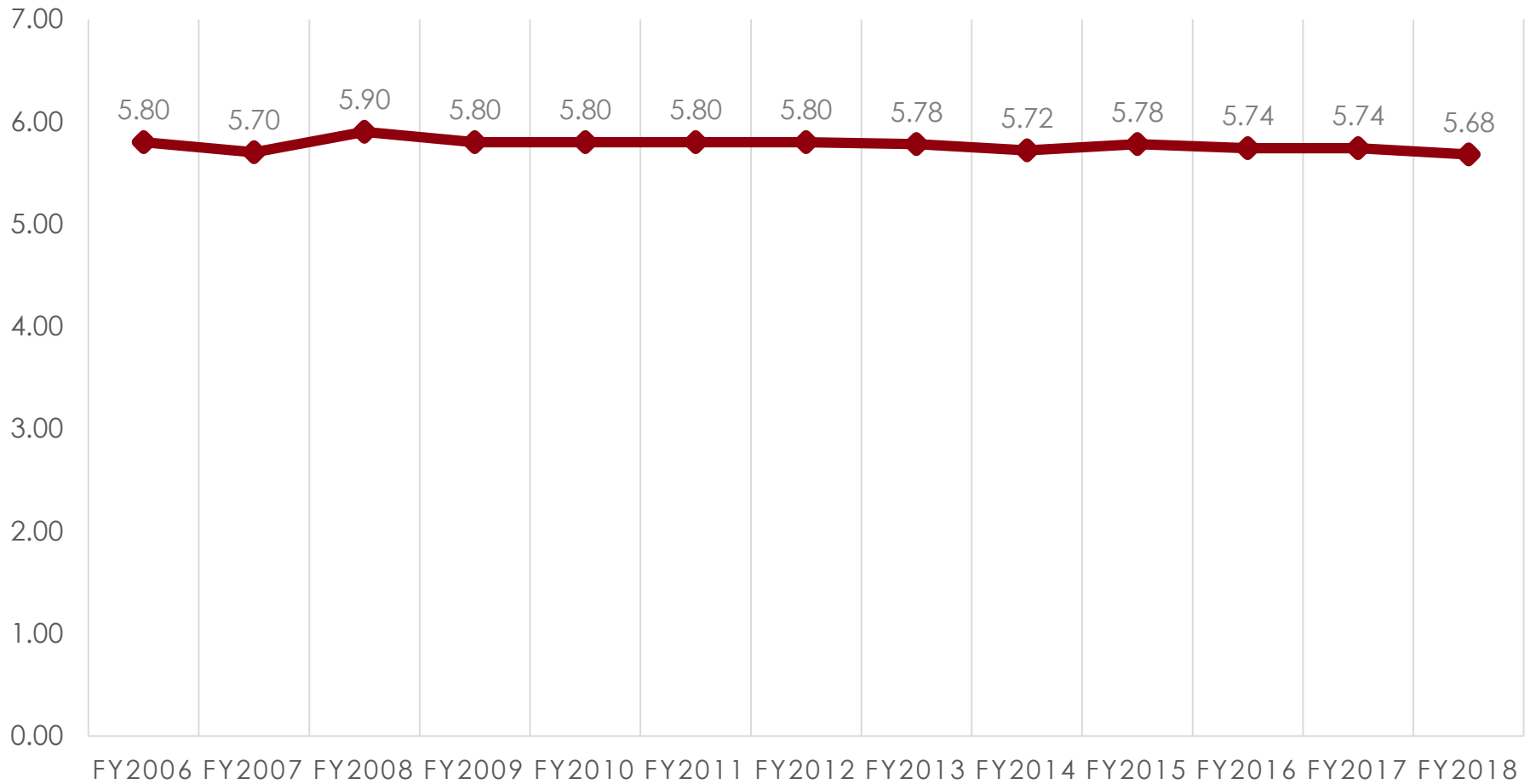
OVERALL SATISFACTION



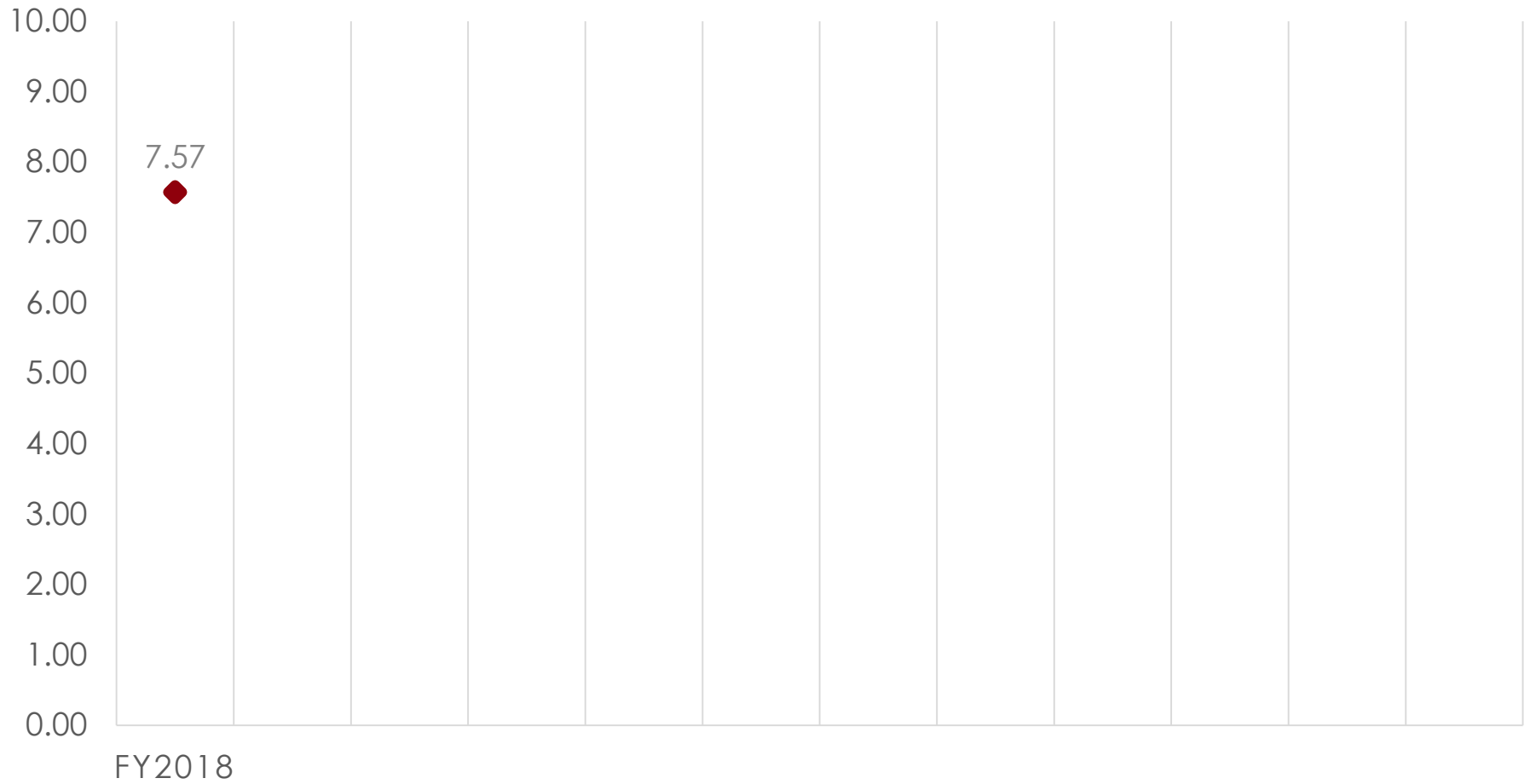
Guam was better than expected



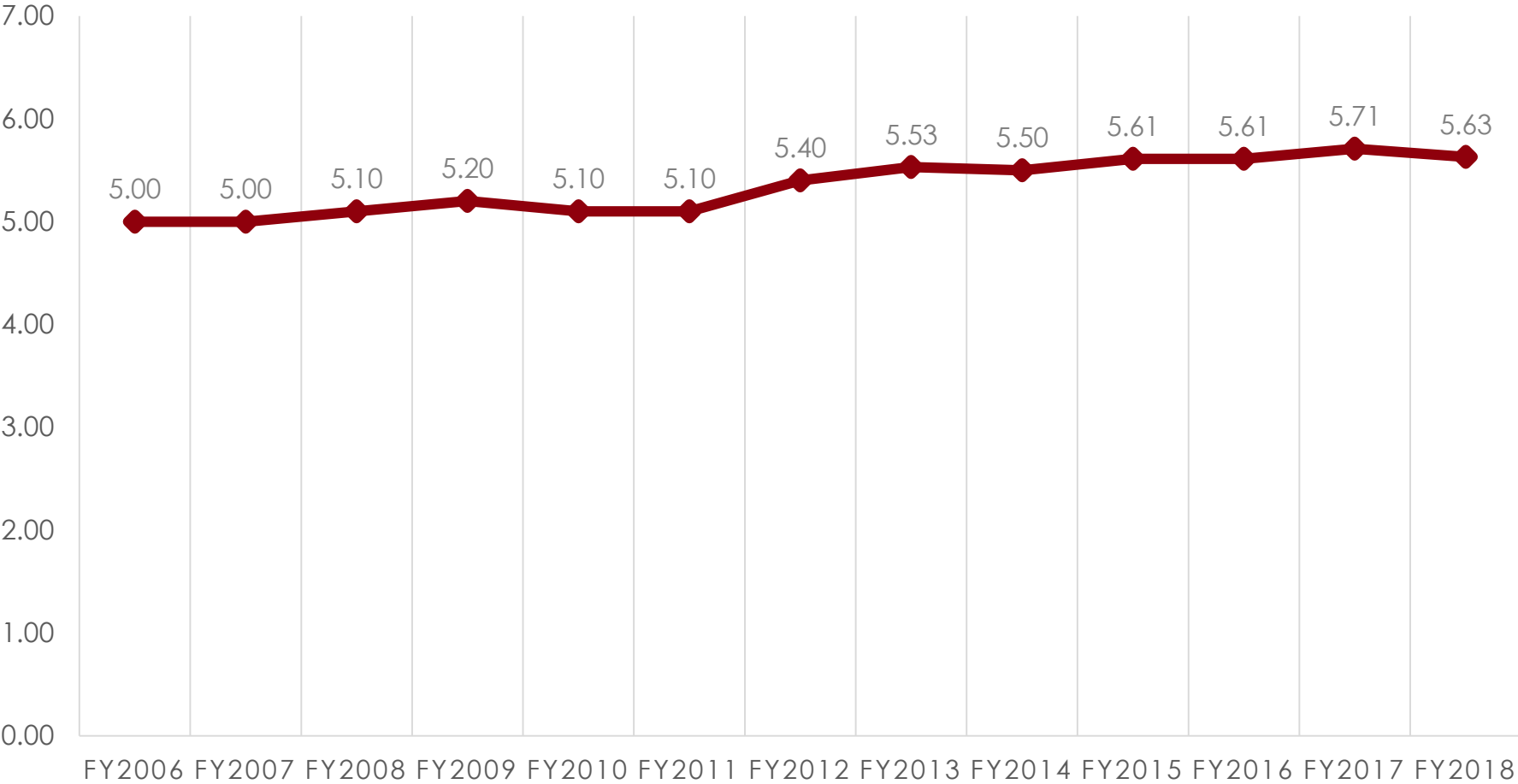
I had no communication problems



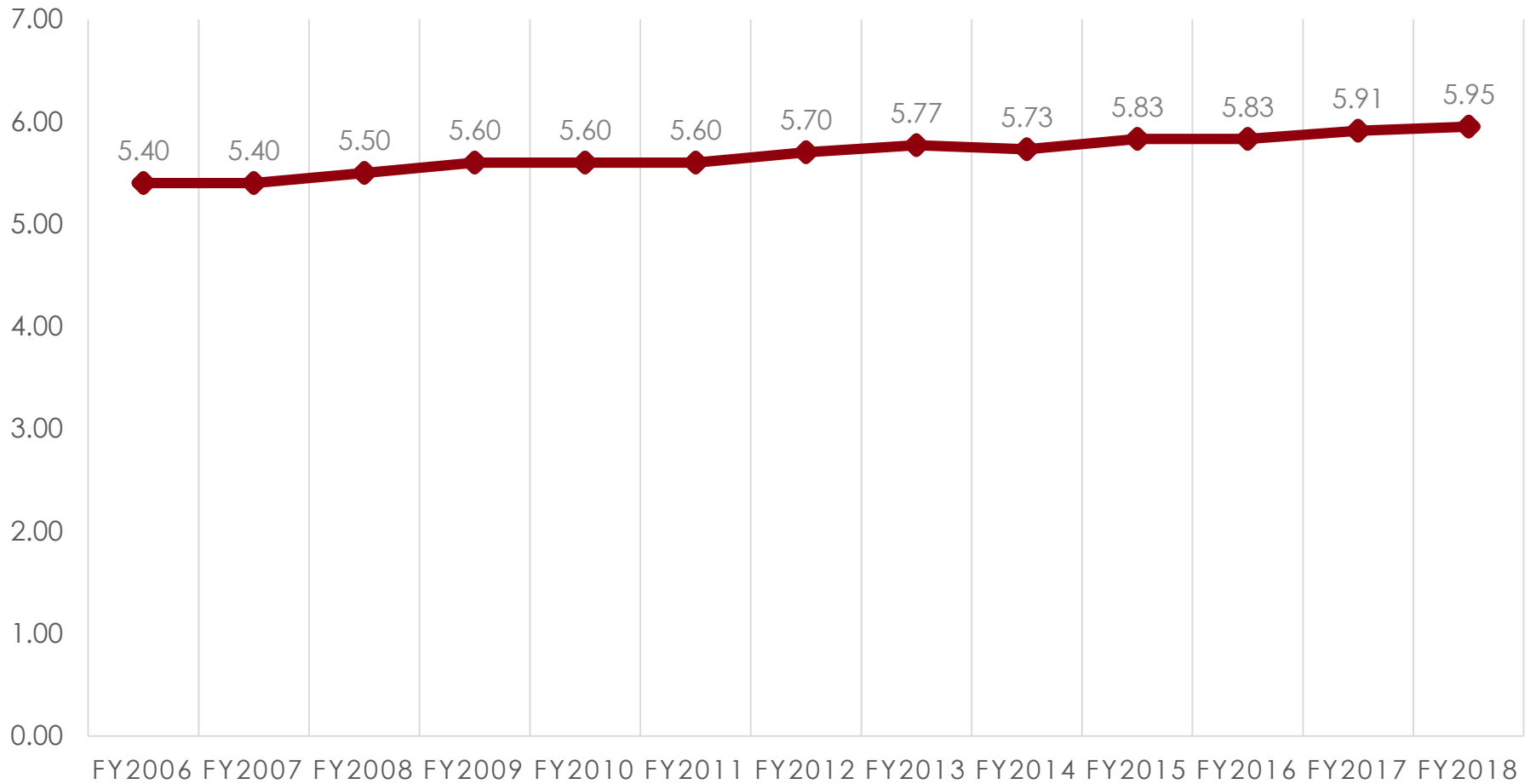
Recommend Guam- family & friends (10PT SCALE)



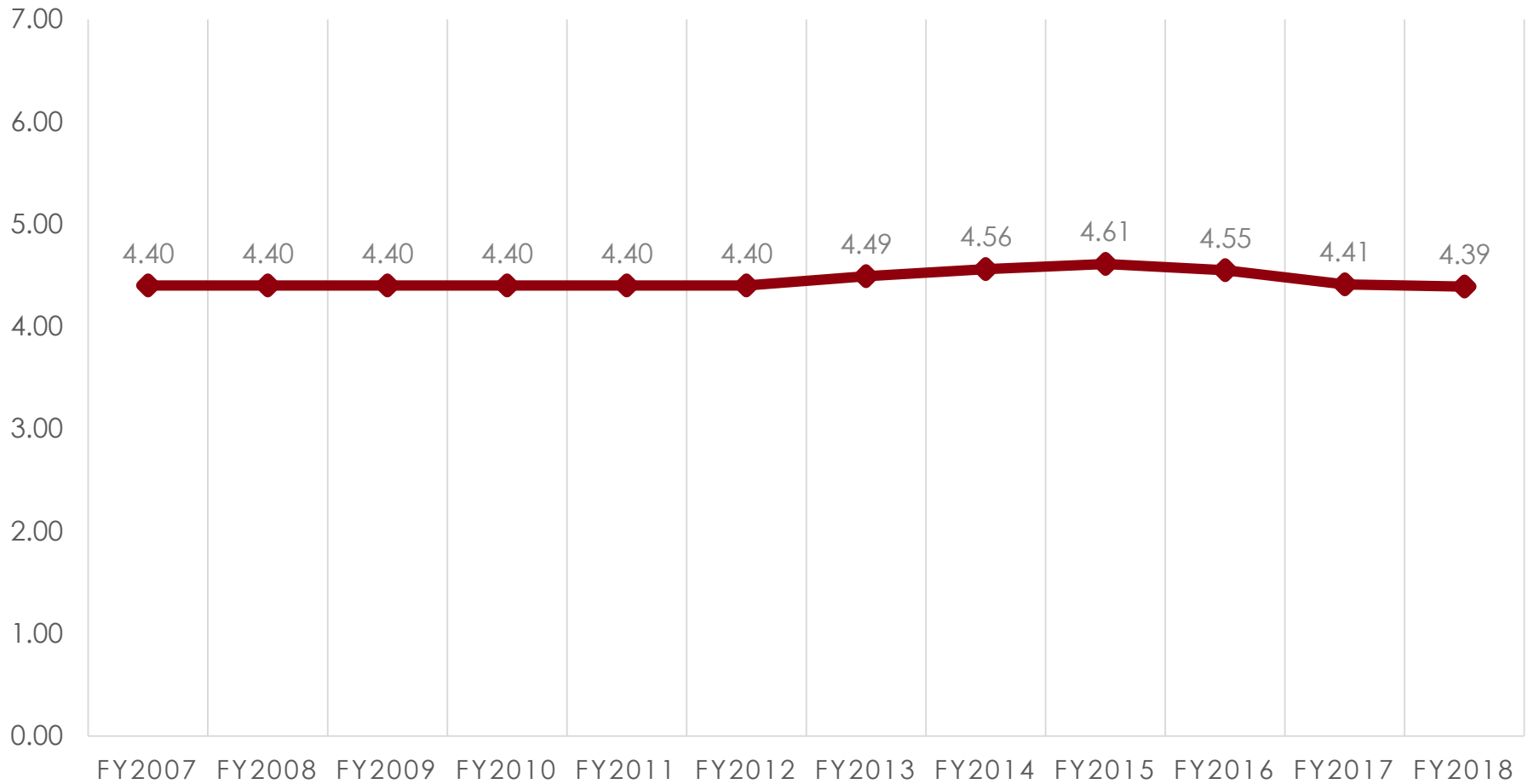
Sites on Guam were attractive



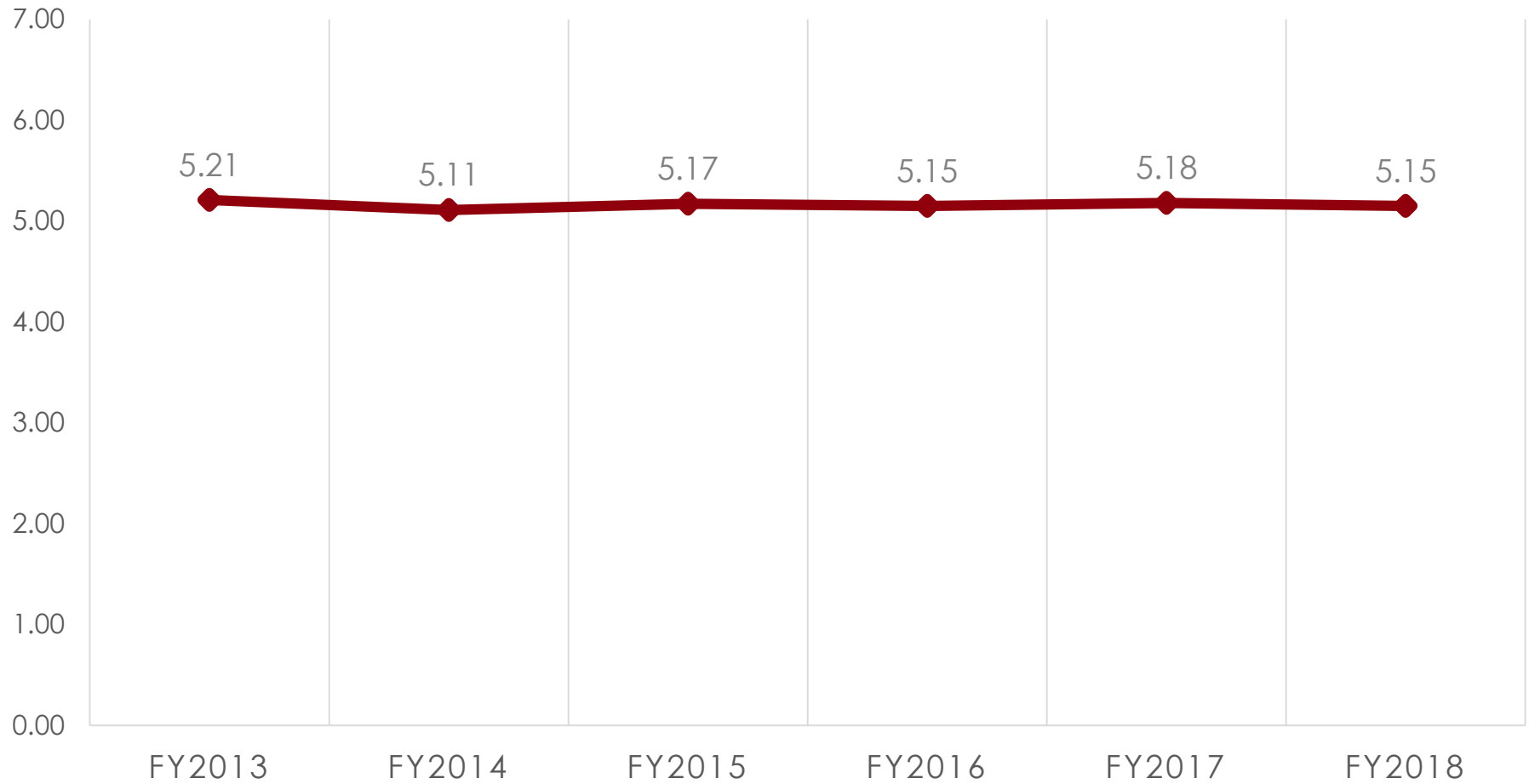
I plan to visit Guam again



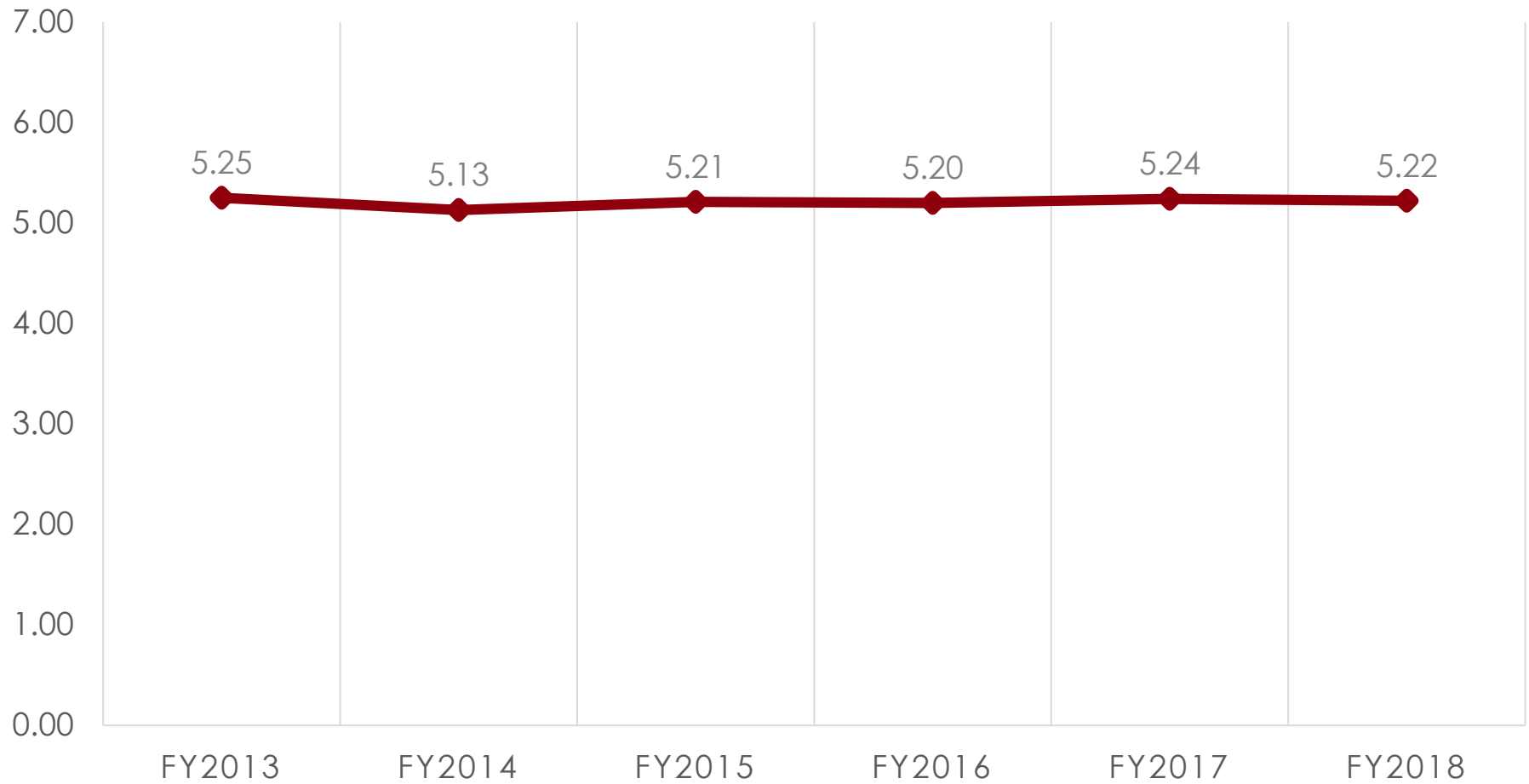
Not enough night time activities



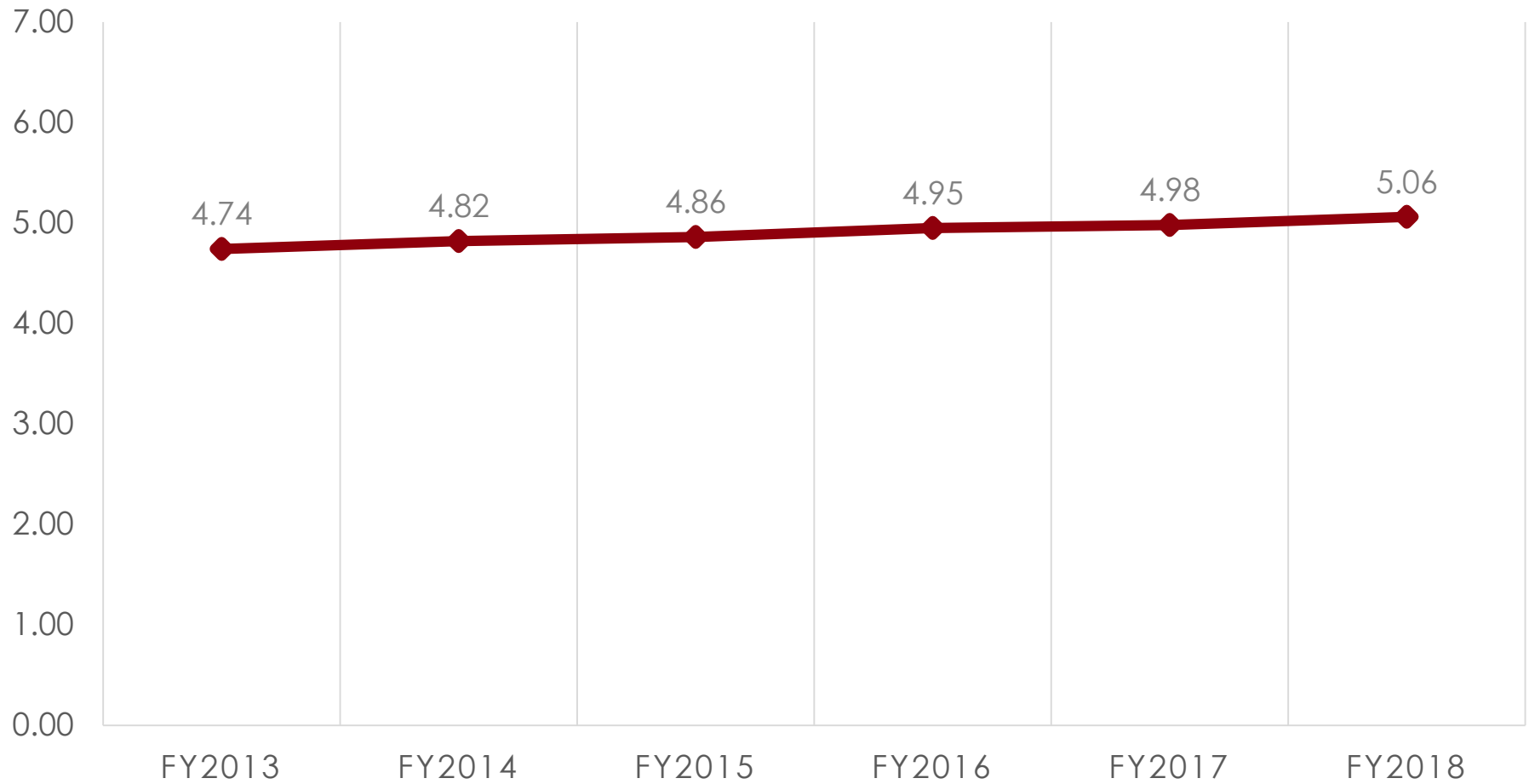
Tour guides were professional



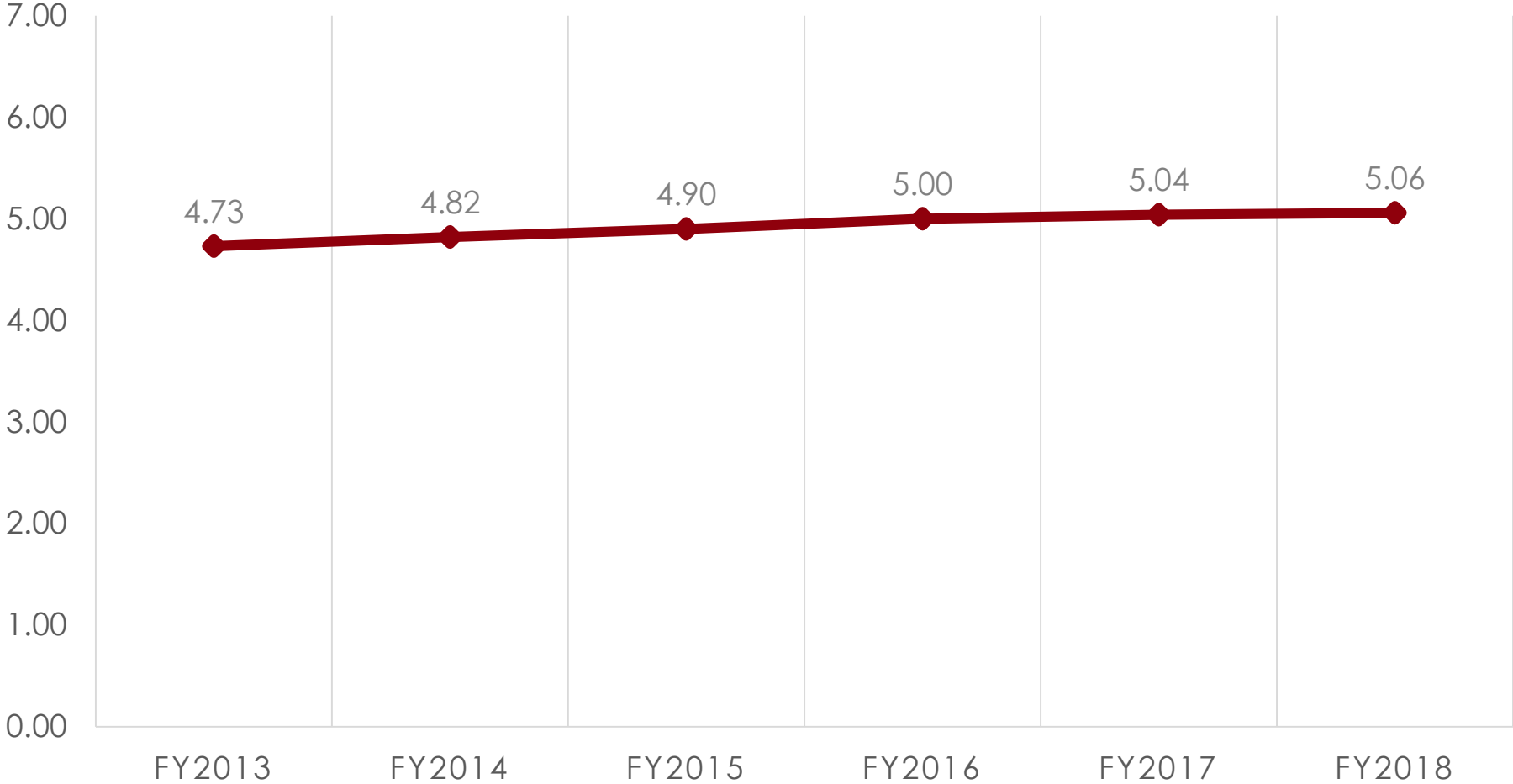
Tour drivers were professional



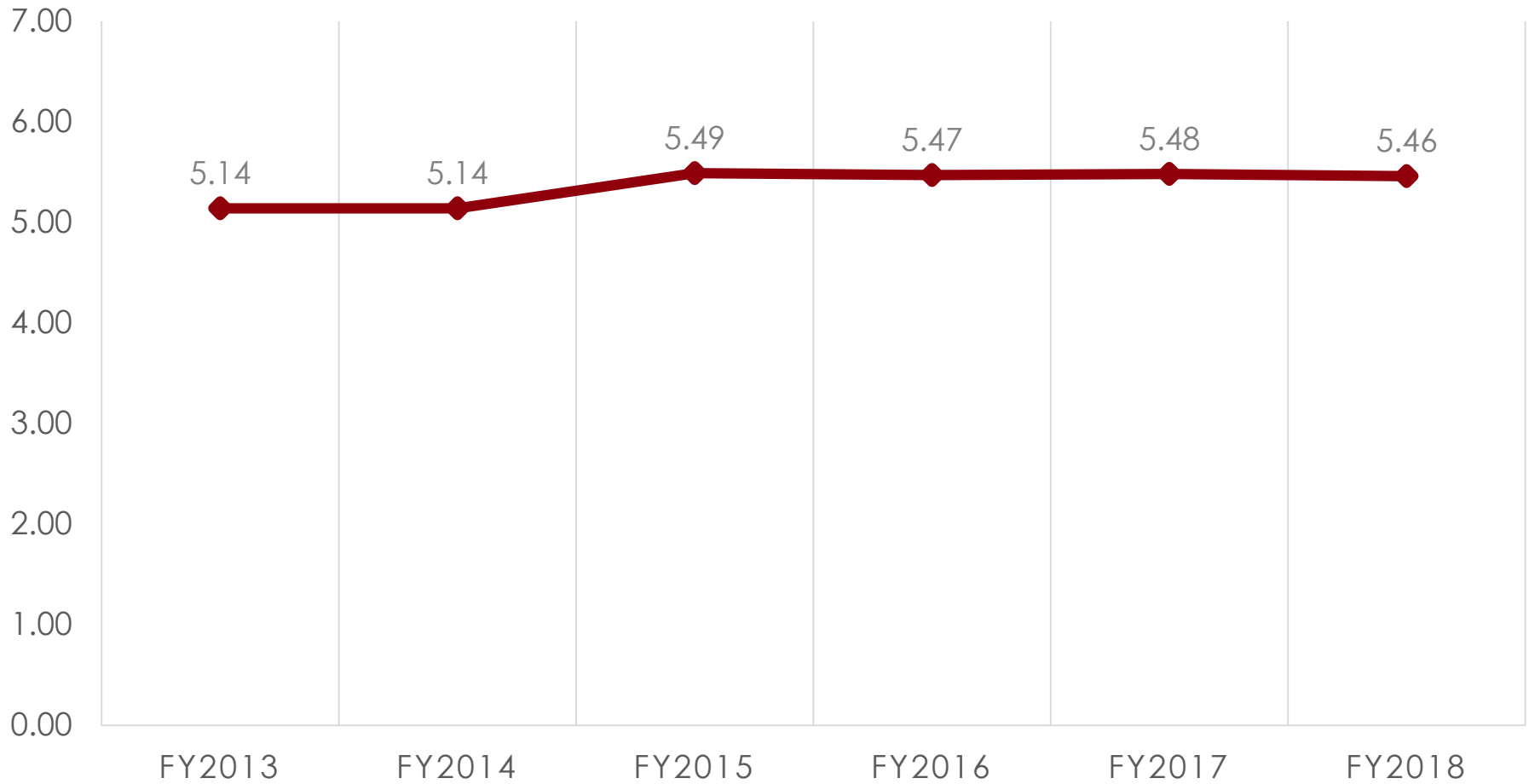
Taxi drivers were professional



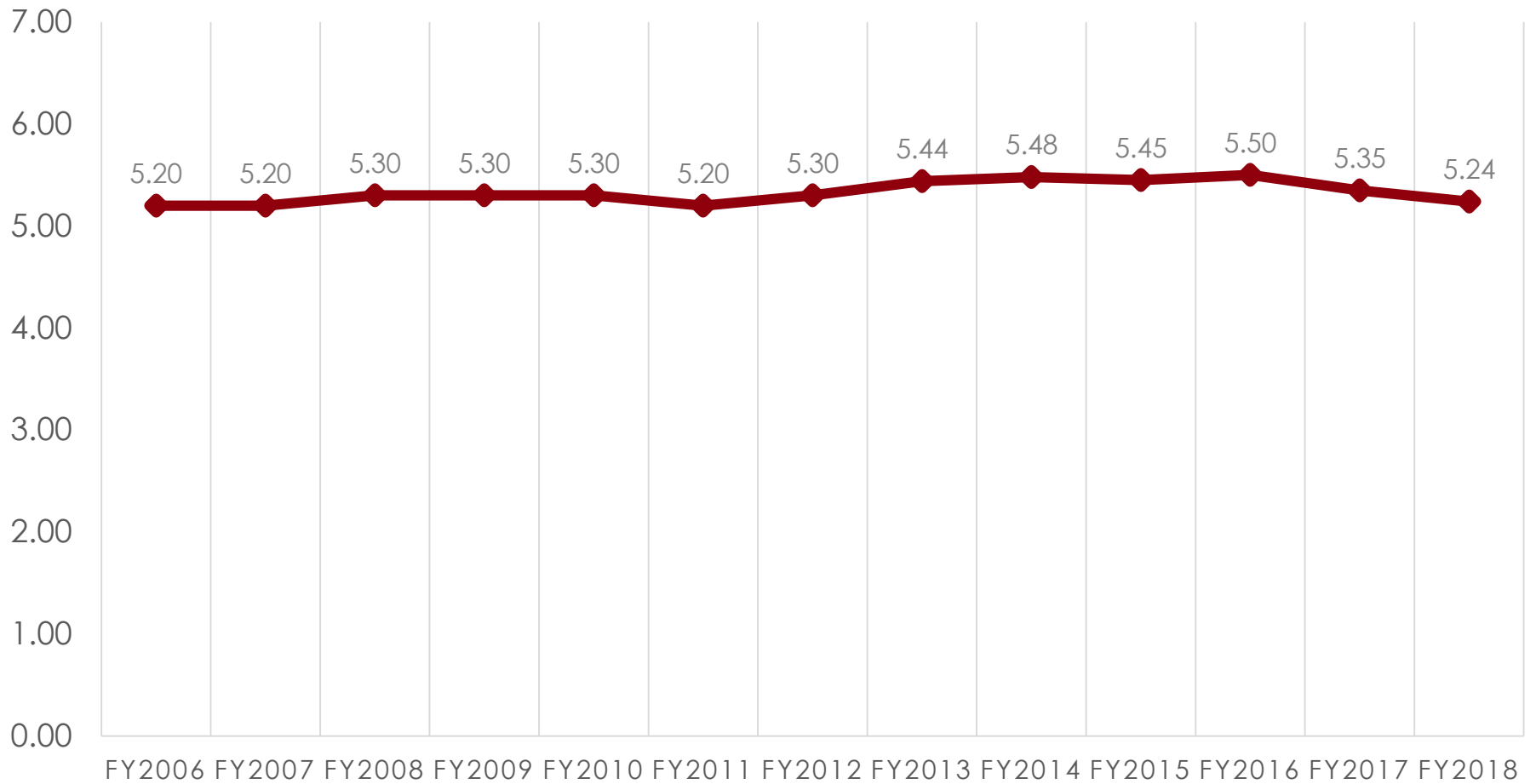
Taxis were clean



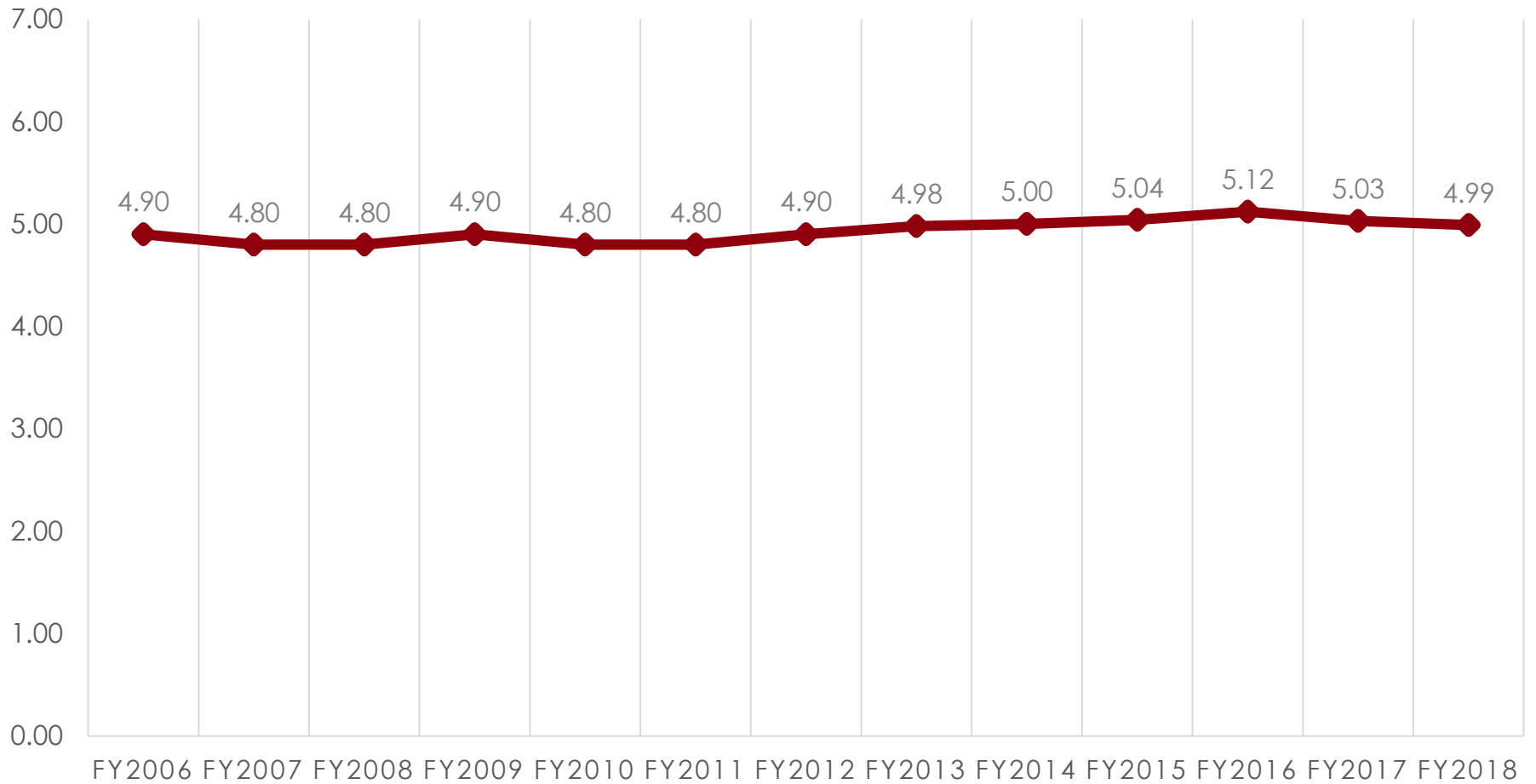
Guam airport was clean



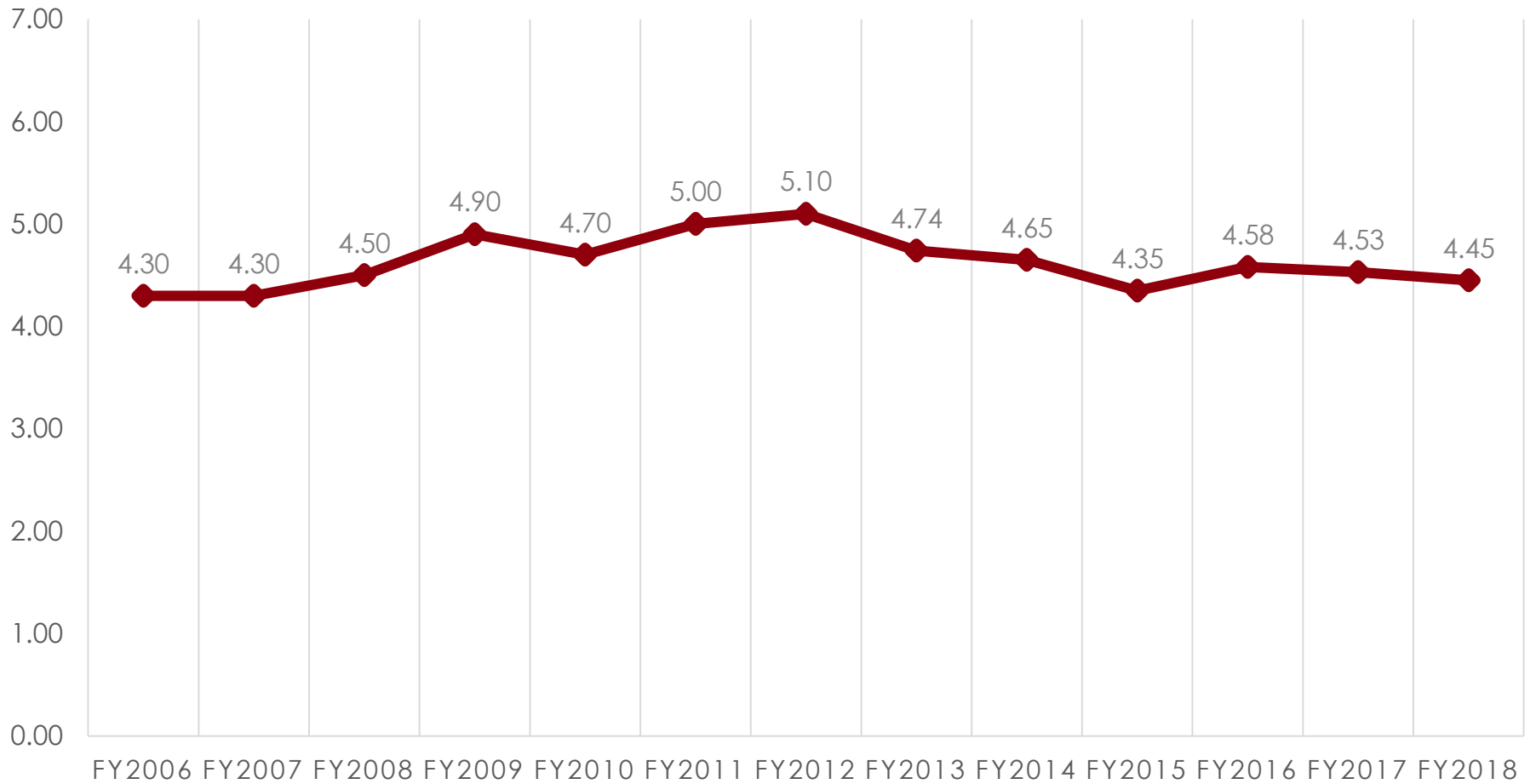
Ease of getting around



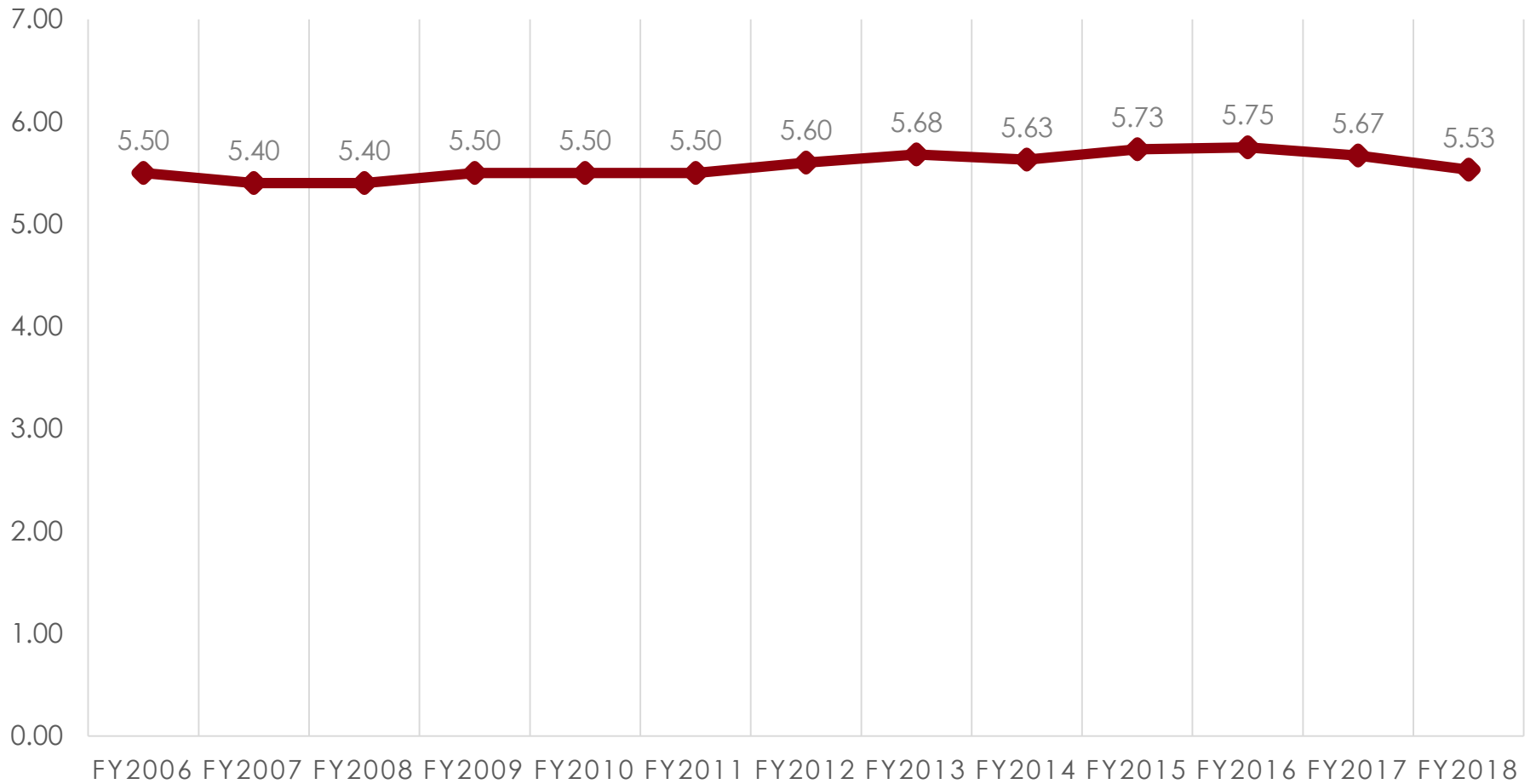
Safety walking around at night



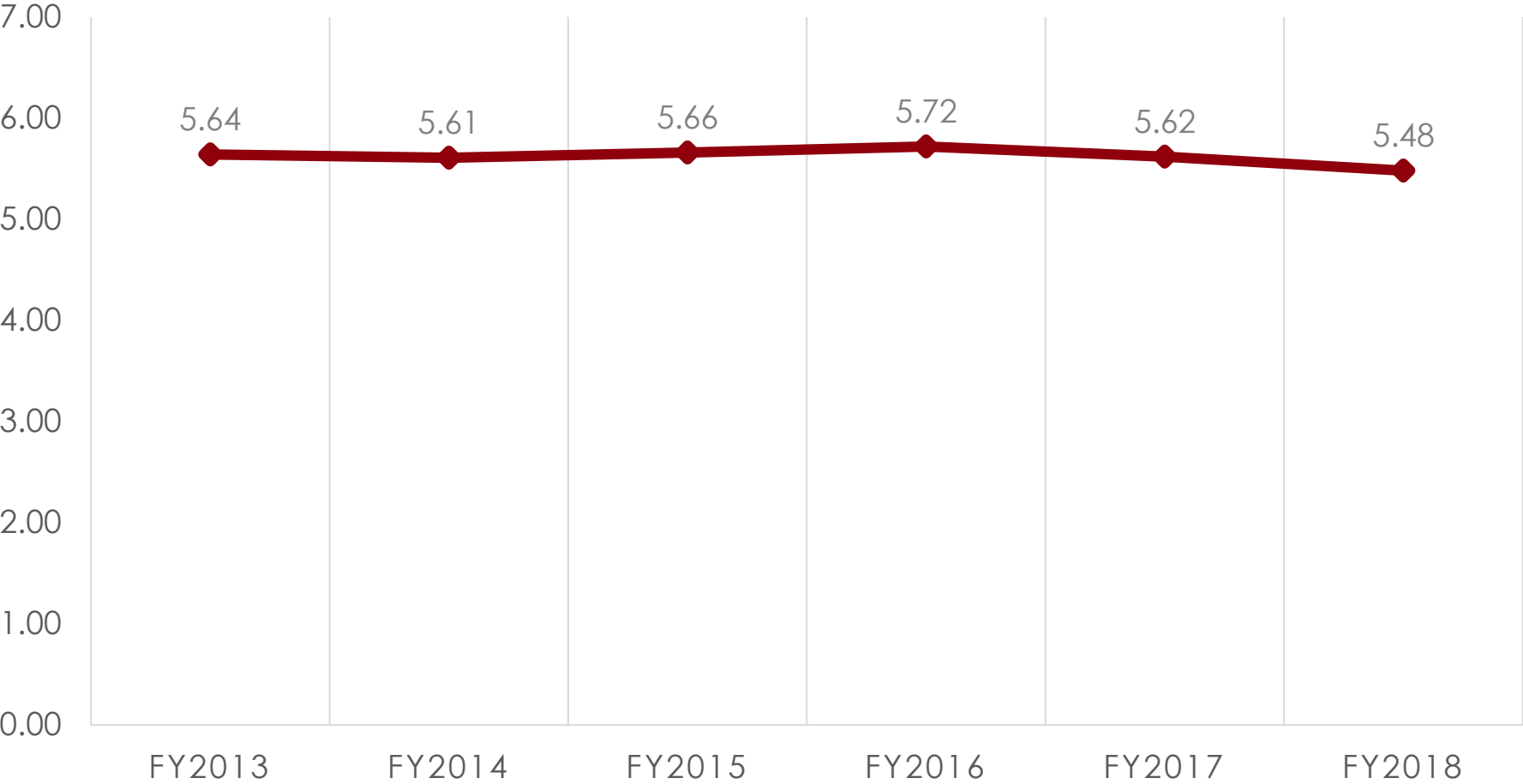
Price of things on Guam



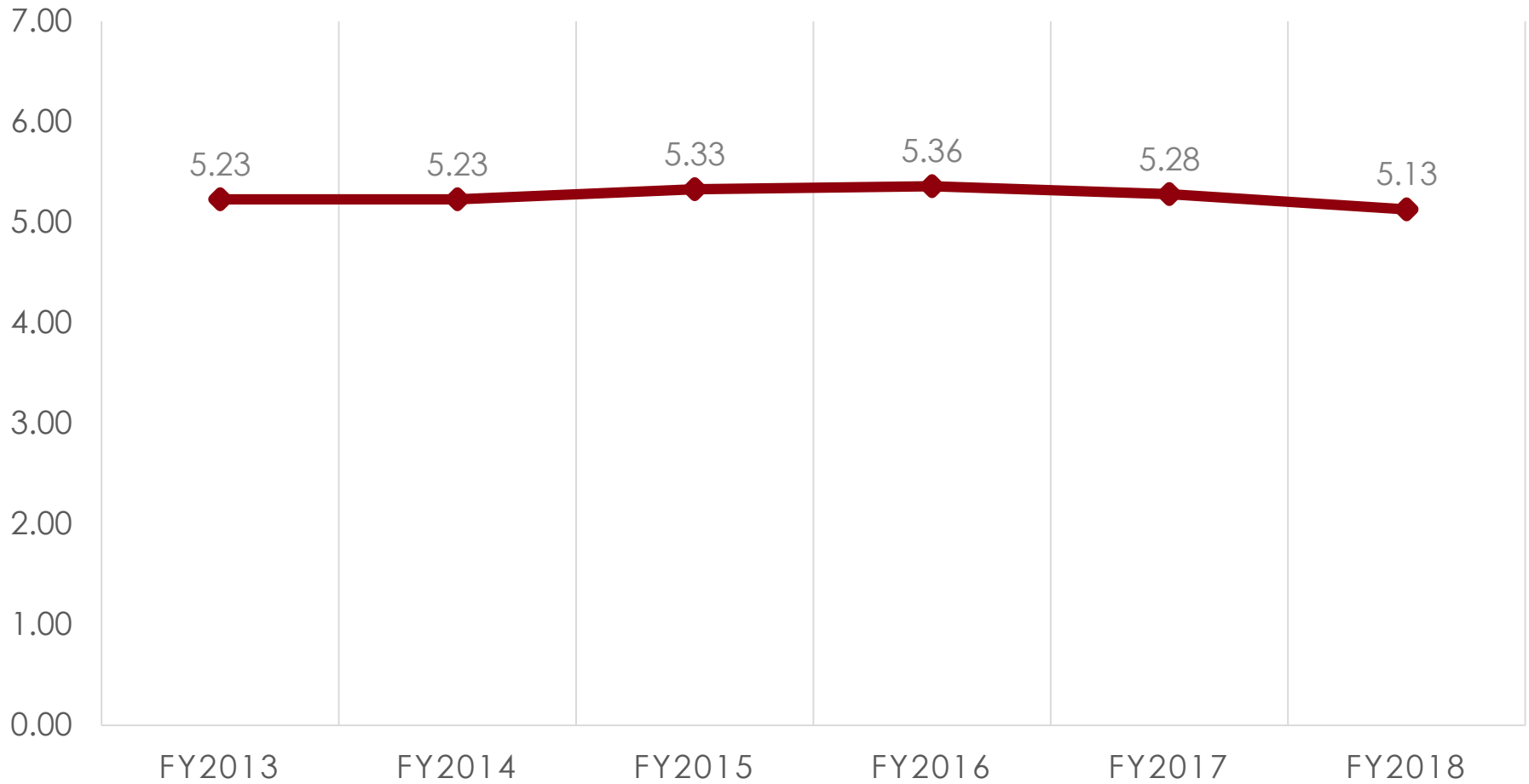
Quality/ Cleanliness- beach, ocean



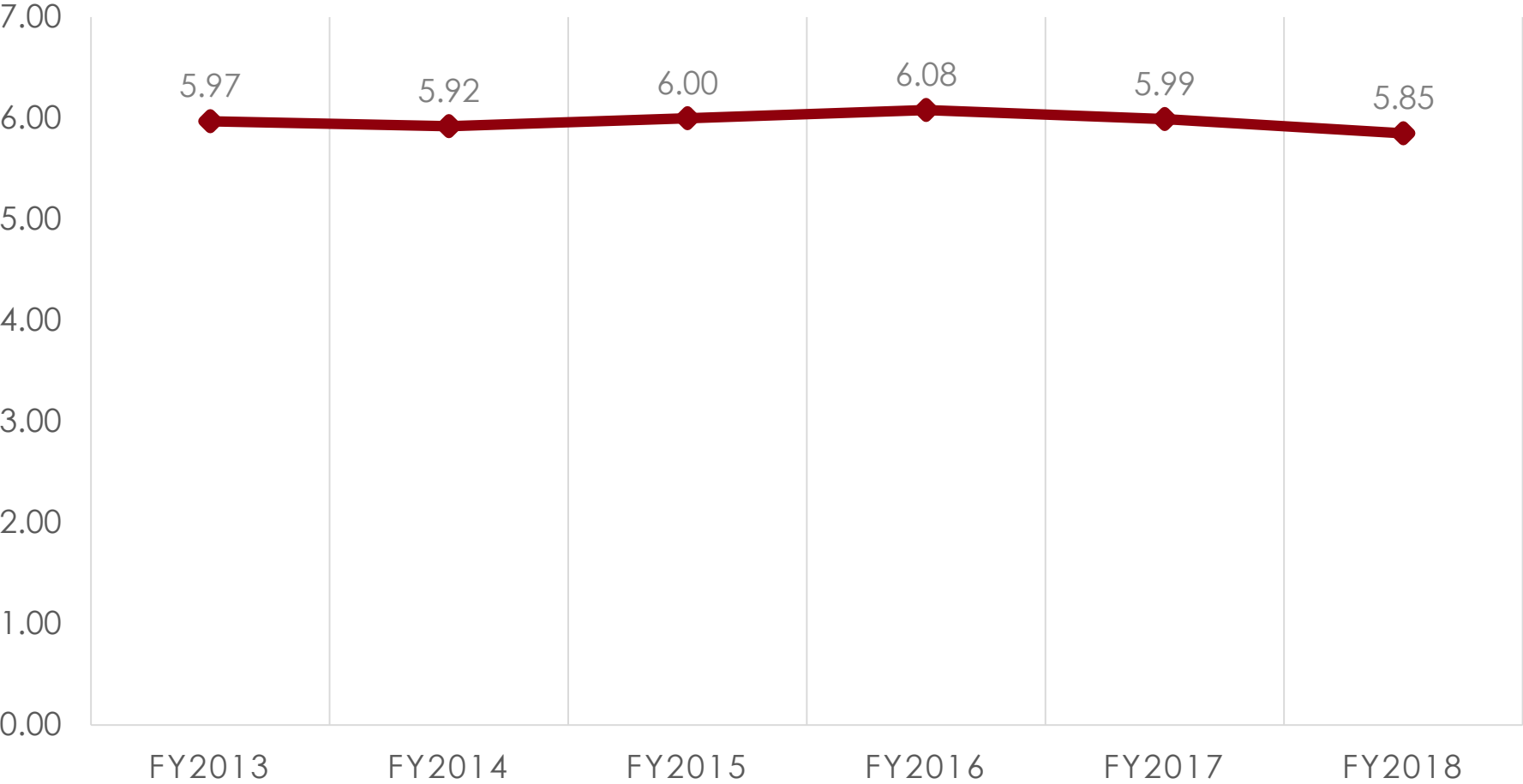
Quality/ Cleanliness- air, sky



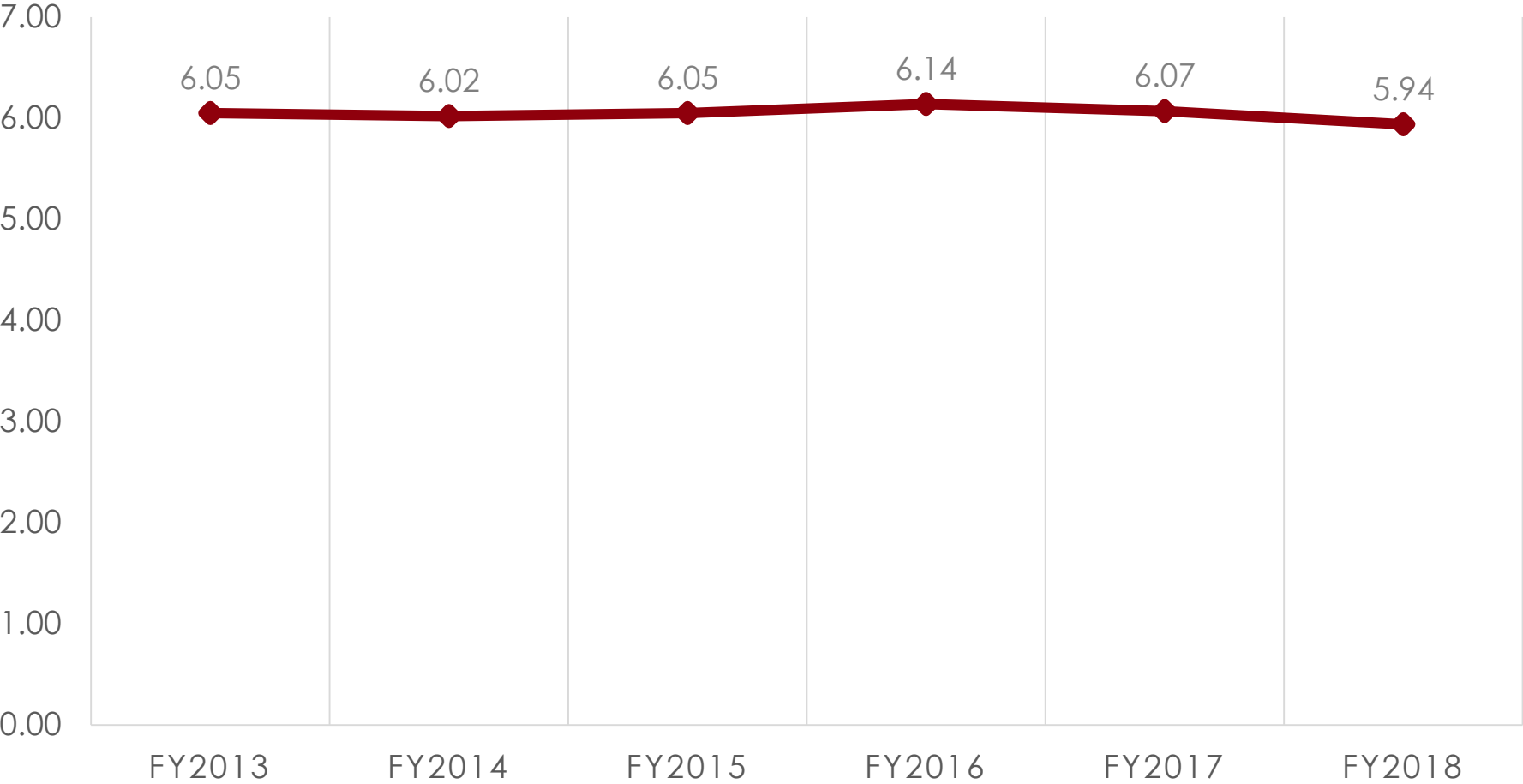
Quality/ Cleanliness- parks



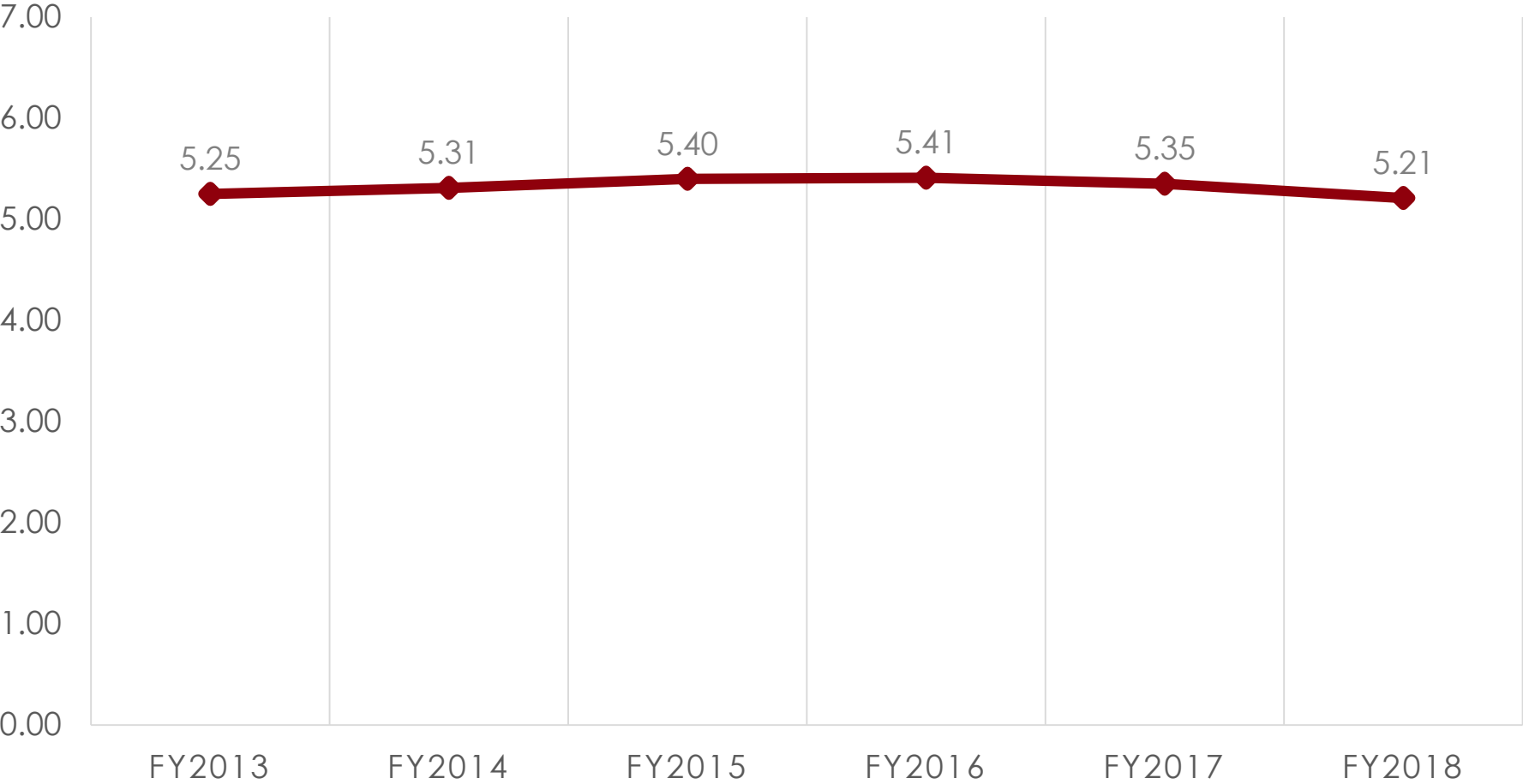
Quality- landscape Tumon



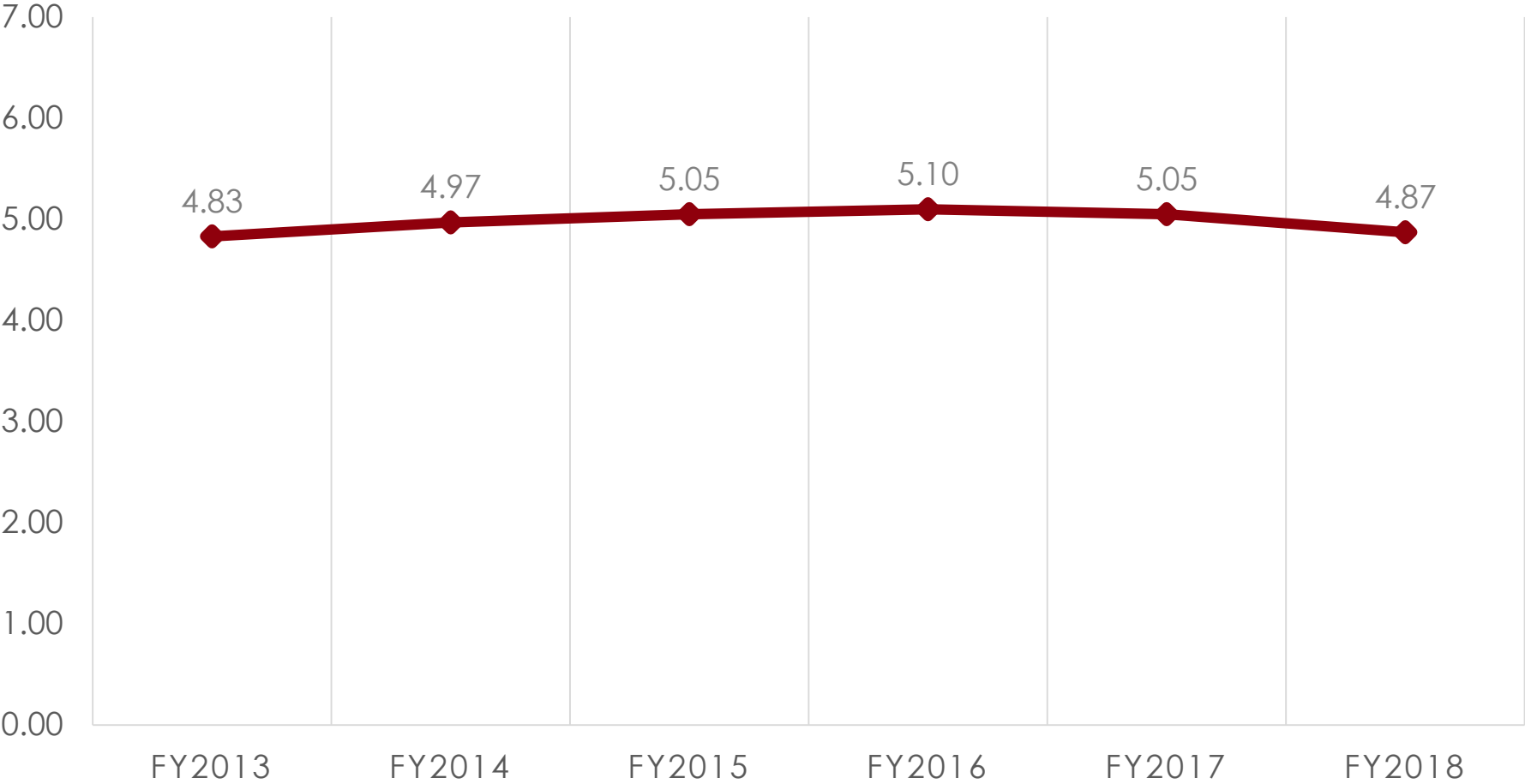
Quality- landscape Guam



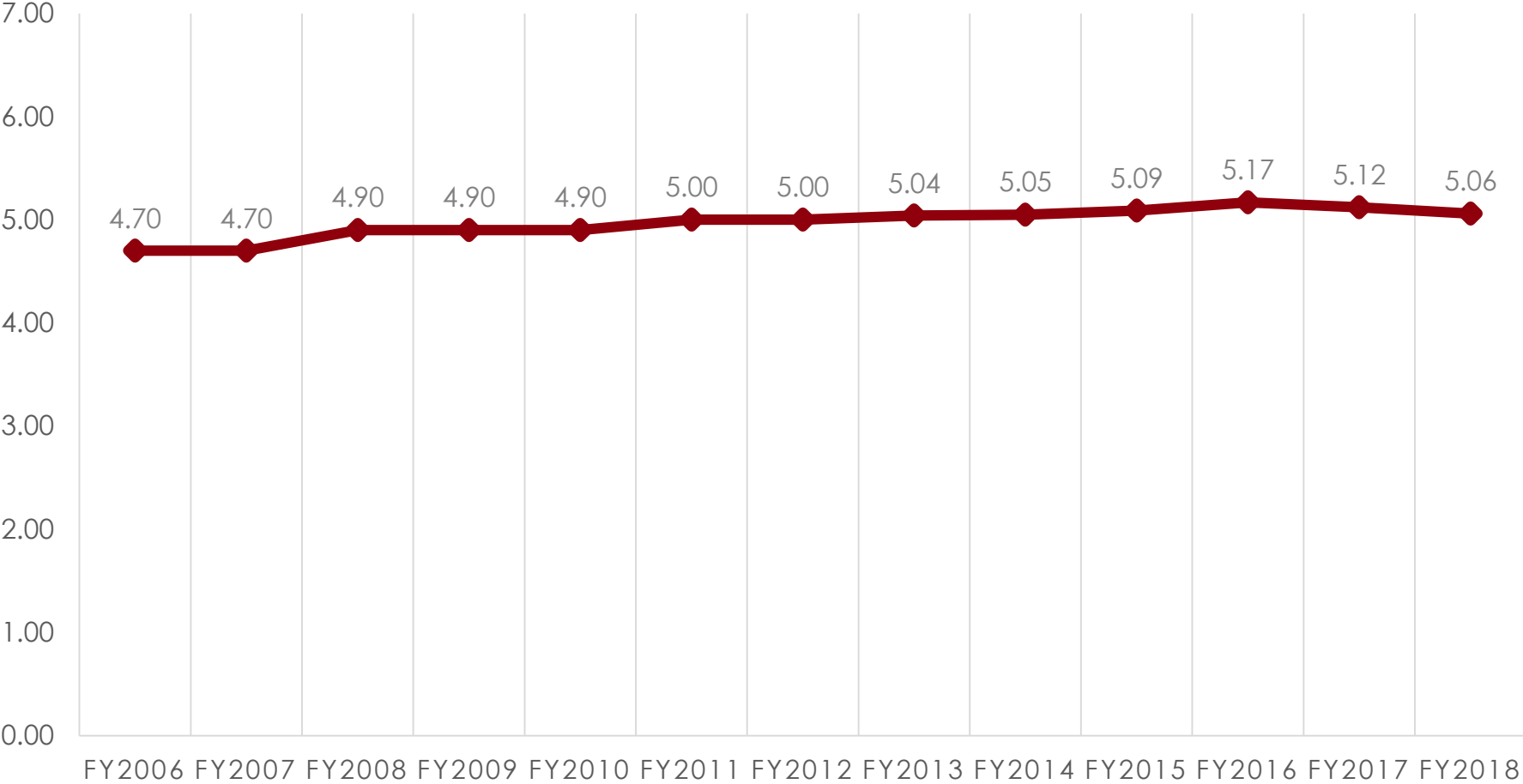
Quality- ground handler



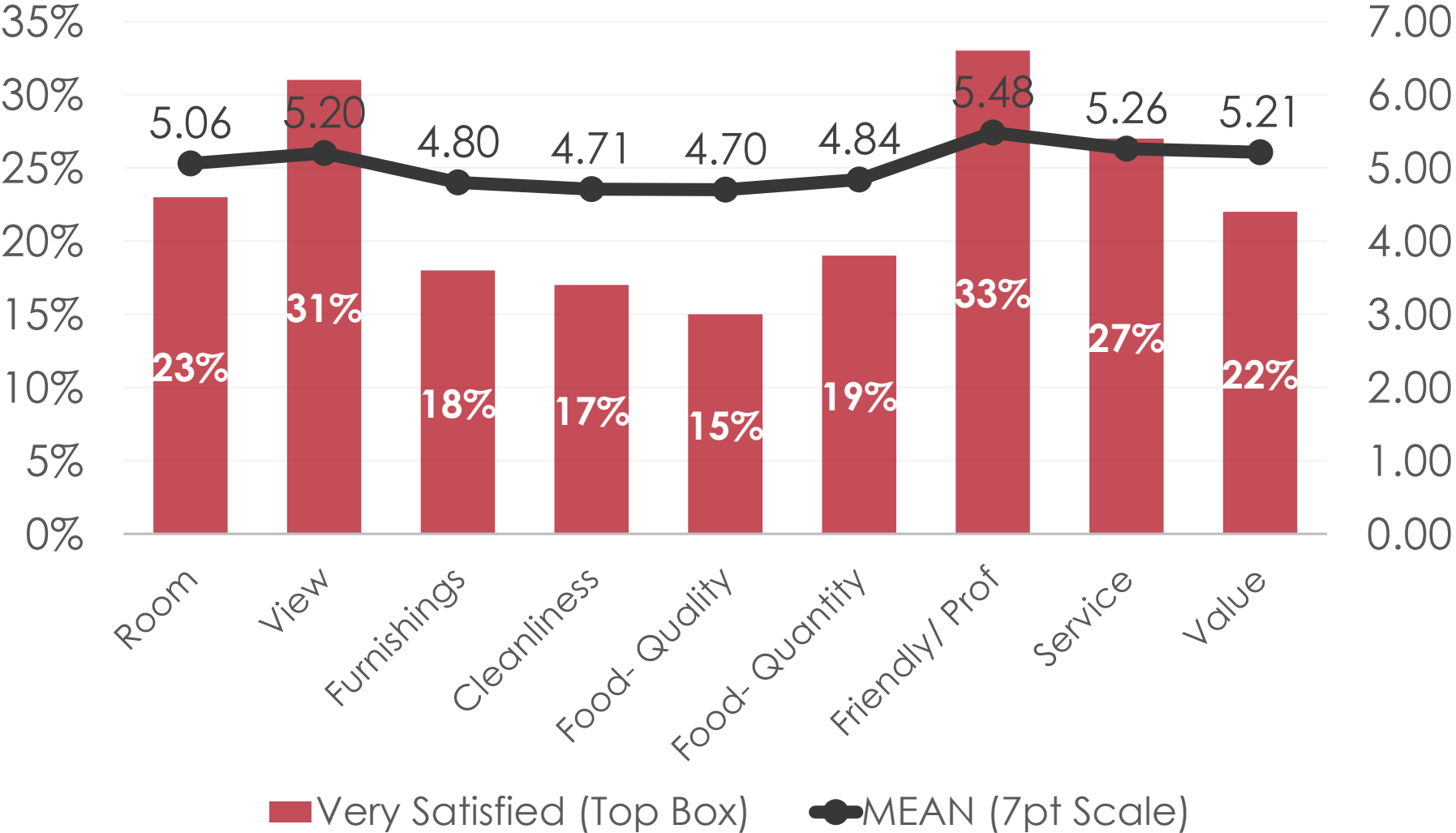
Quality/ Cleanliness- transportation vehicle



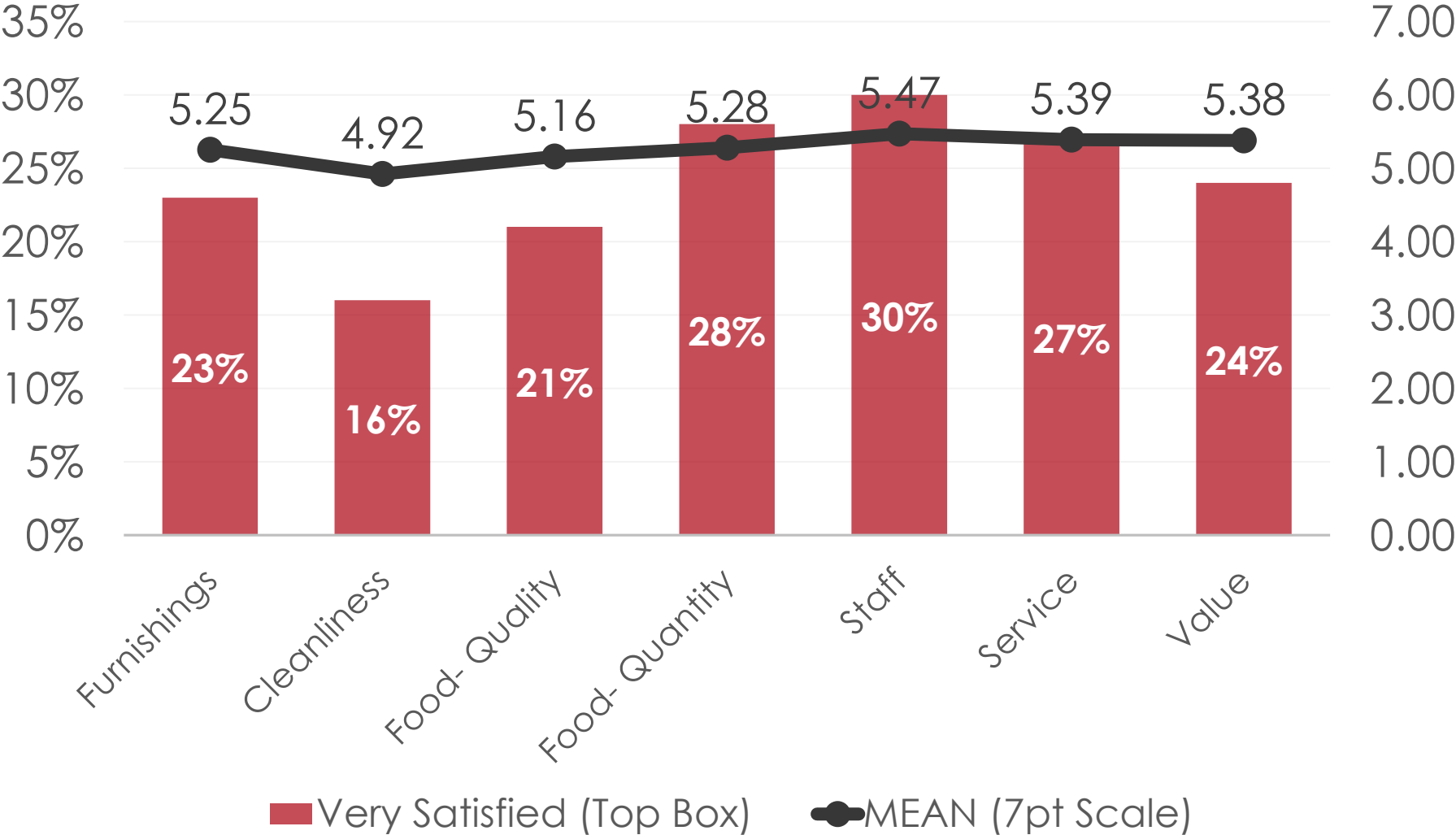
ACCOMMODATIONS OVERALL SATISFACTION



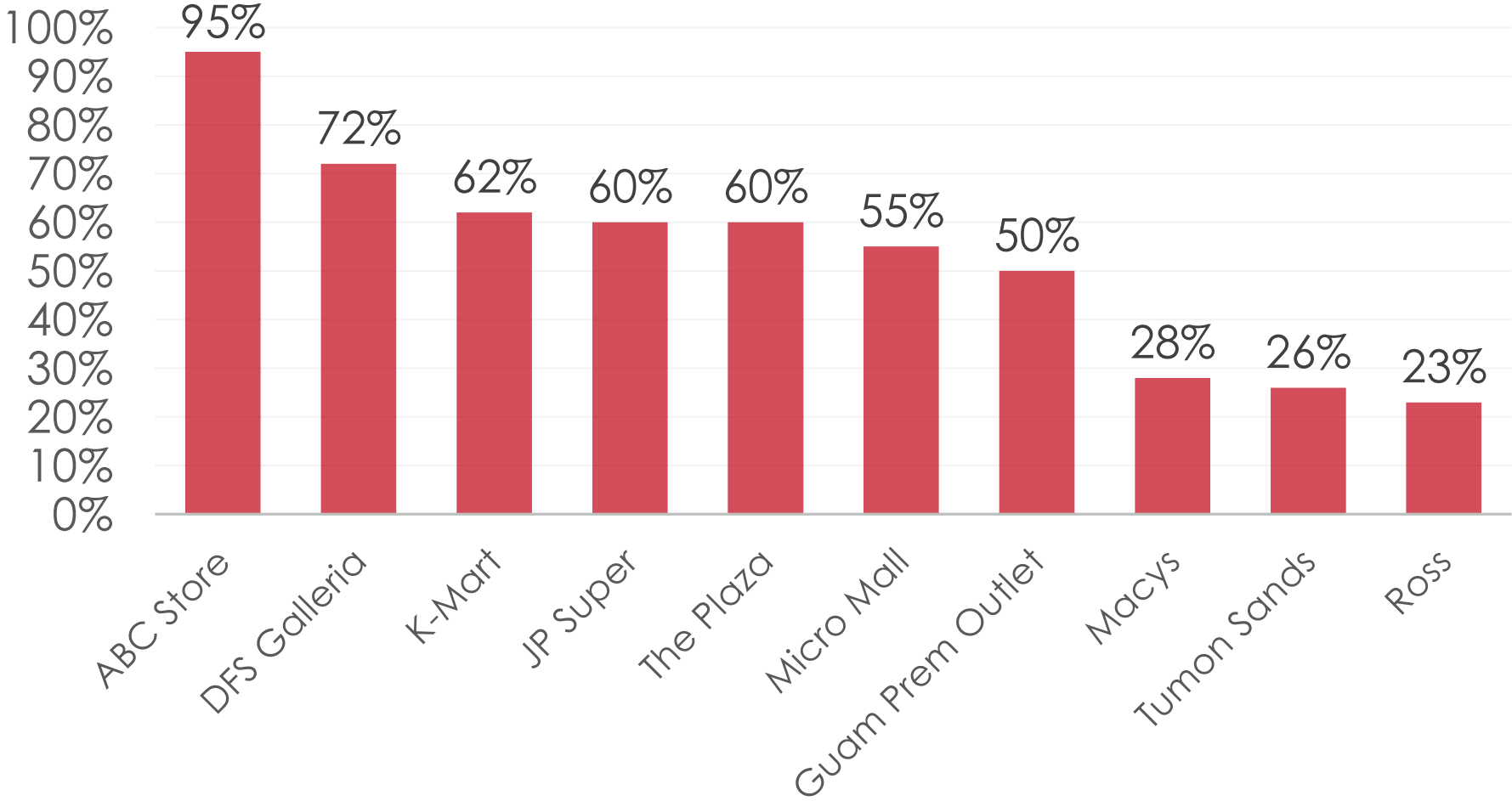
ACCOMMODATIONS – Satisfaction by Category



DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



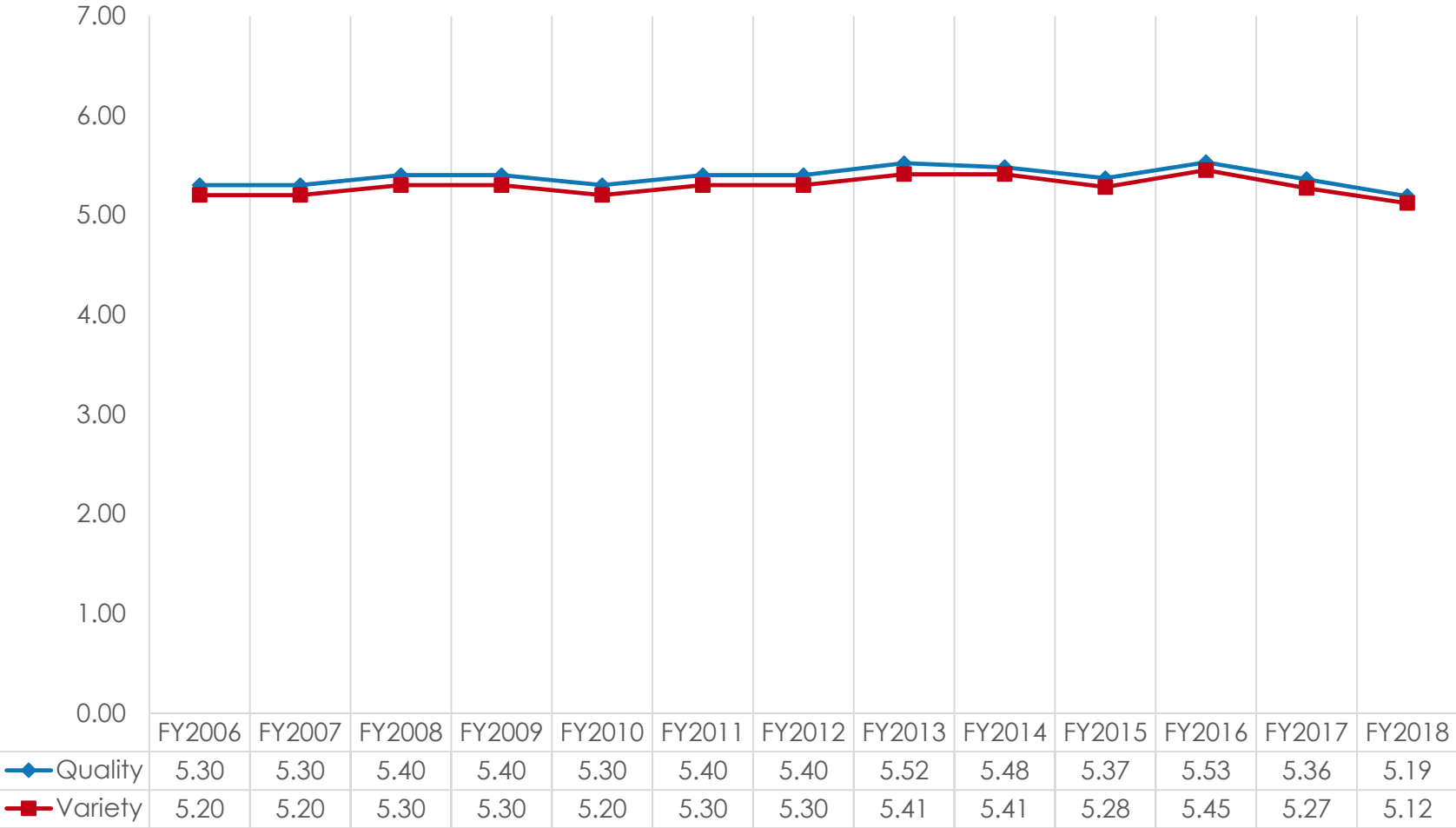
Shopping Malls/ Stores (Top Responses)



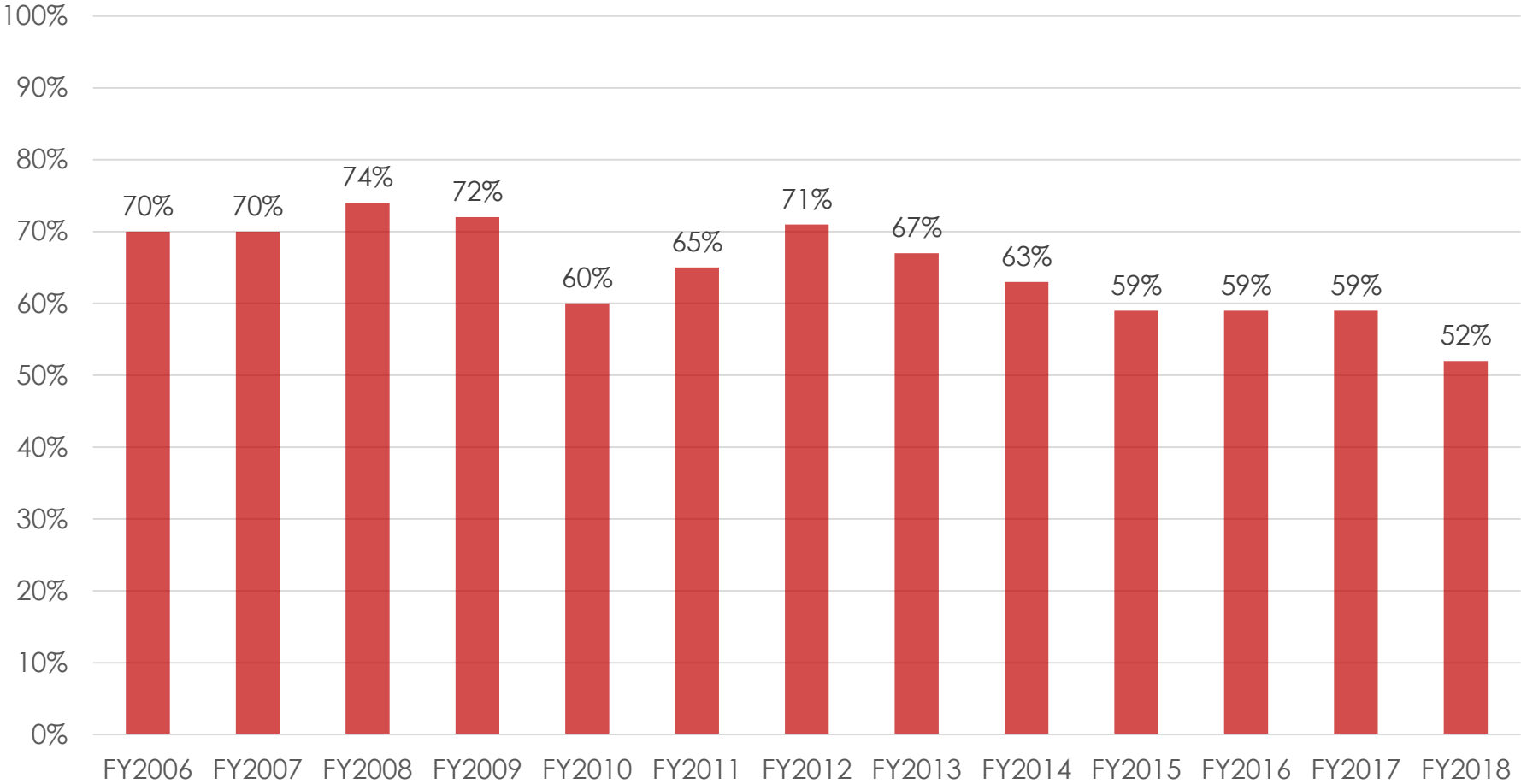
Shopping Malls/ Stores (Top Responses)

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
ABC	94%	95%	96%	95%	94%	94%	95%	95%	95%	96%	96%	96%	95%
DFS	95%	95%	94%	92%	89%	91%	90%	87%	85%	79%	74%	74%	72%
The Plaza	54%	56%	60%	60%	57%	62%	66%	67%	69%	68%	62%	61%	60%
JP Super	Not top6	Not top6	Not top6	Not top6	Not top6	63%	71%	67%	65%	66%	65%	64%	60%
K-Mart	55%	58%	66%	61%	64%	64%	62%	66%	66%	70%	69%	65%	62%
Micro Mall	66%	70%	72%	71%	65%	64%	65%	64%	60%	55%	53%	56%	55%
Prem Outlet	59%	56%	63%	64%	58%	Not top6	Not top6	Not top6	Not top6	55%	53%	Not Top6	Not Top 6

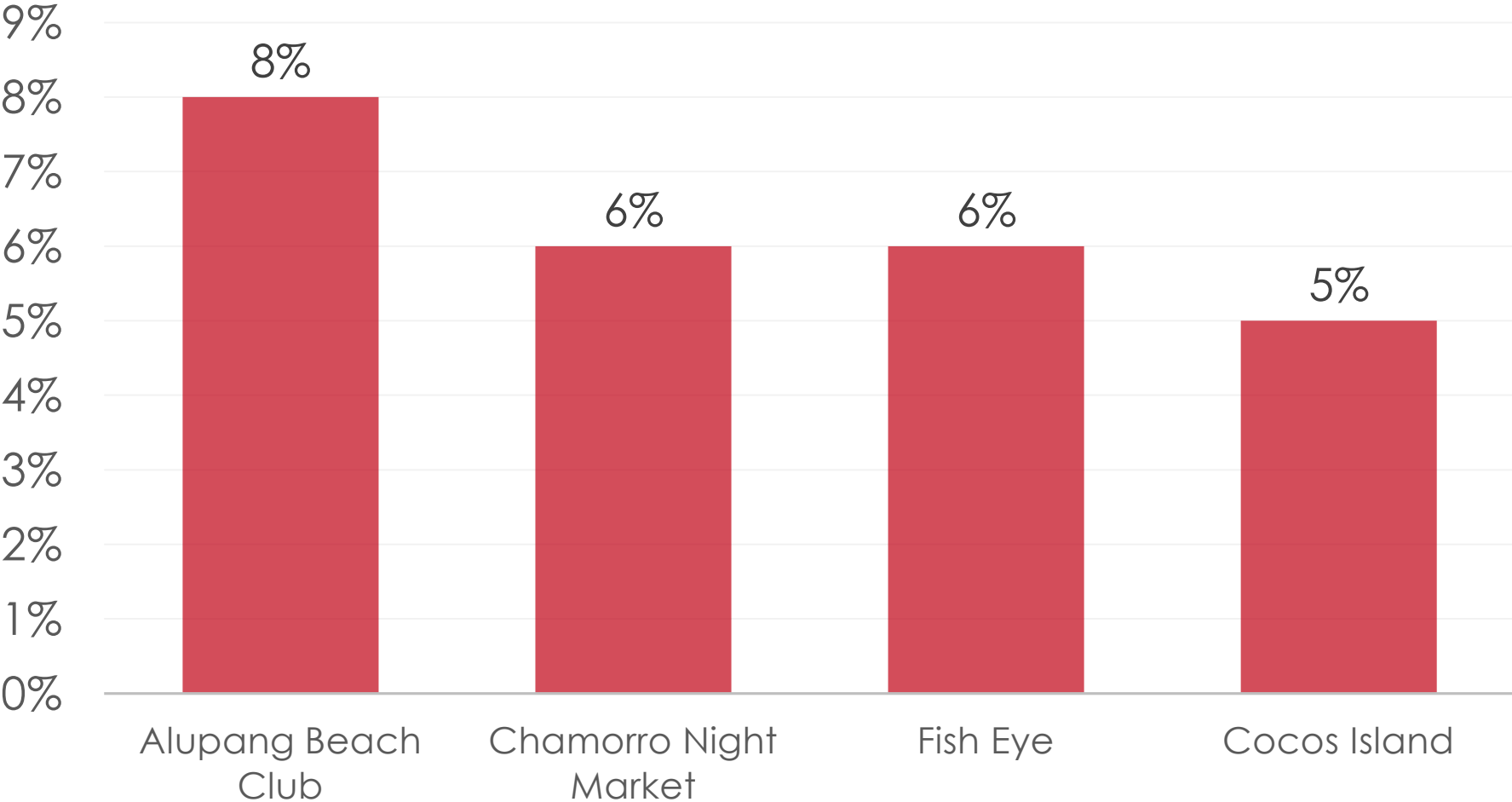
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – Tracking

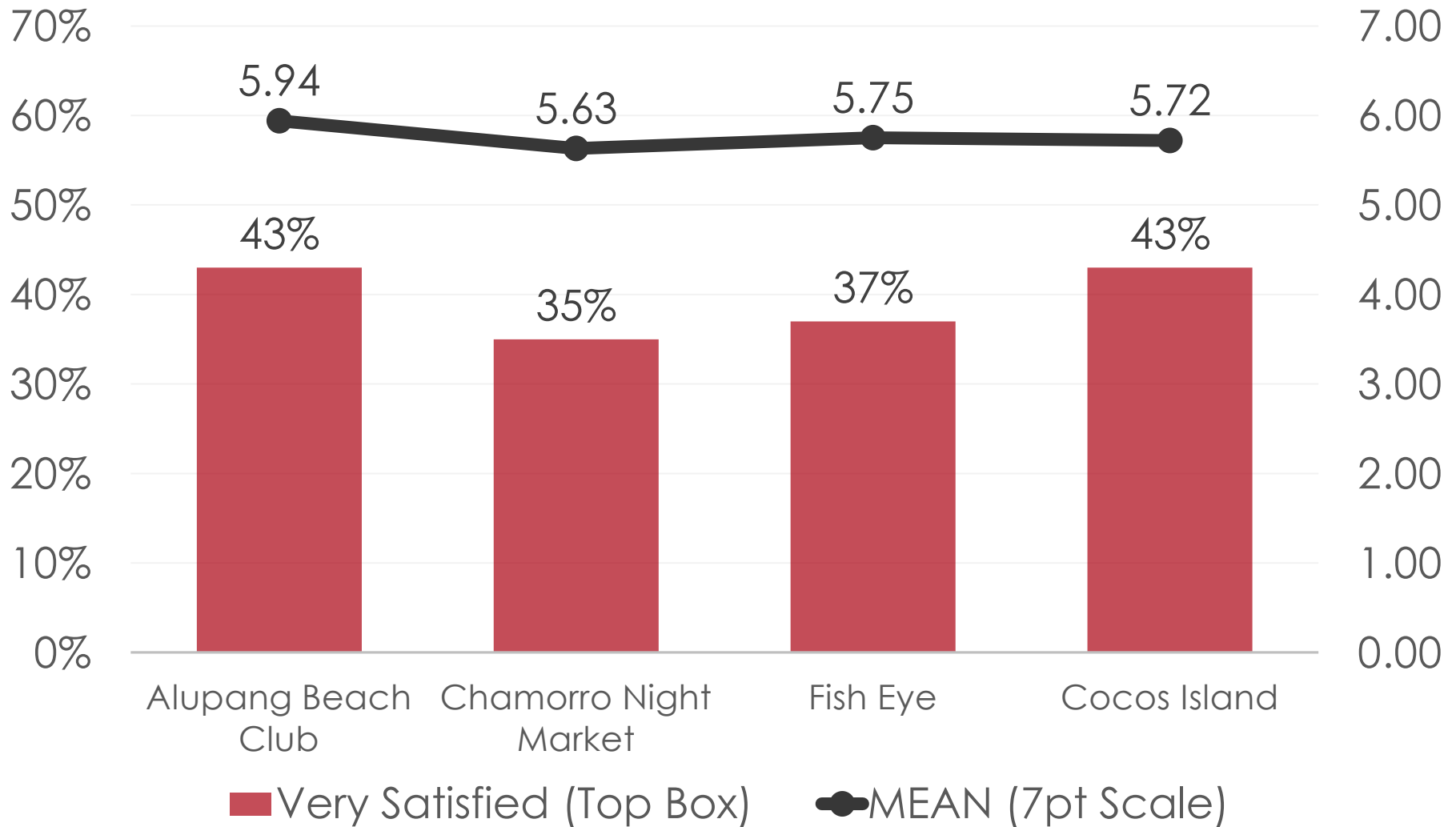


Optional Tour Participation (Top Responses)

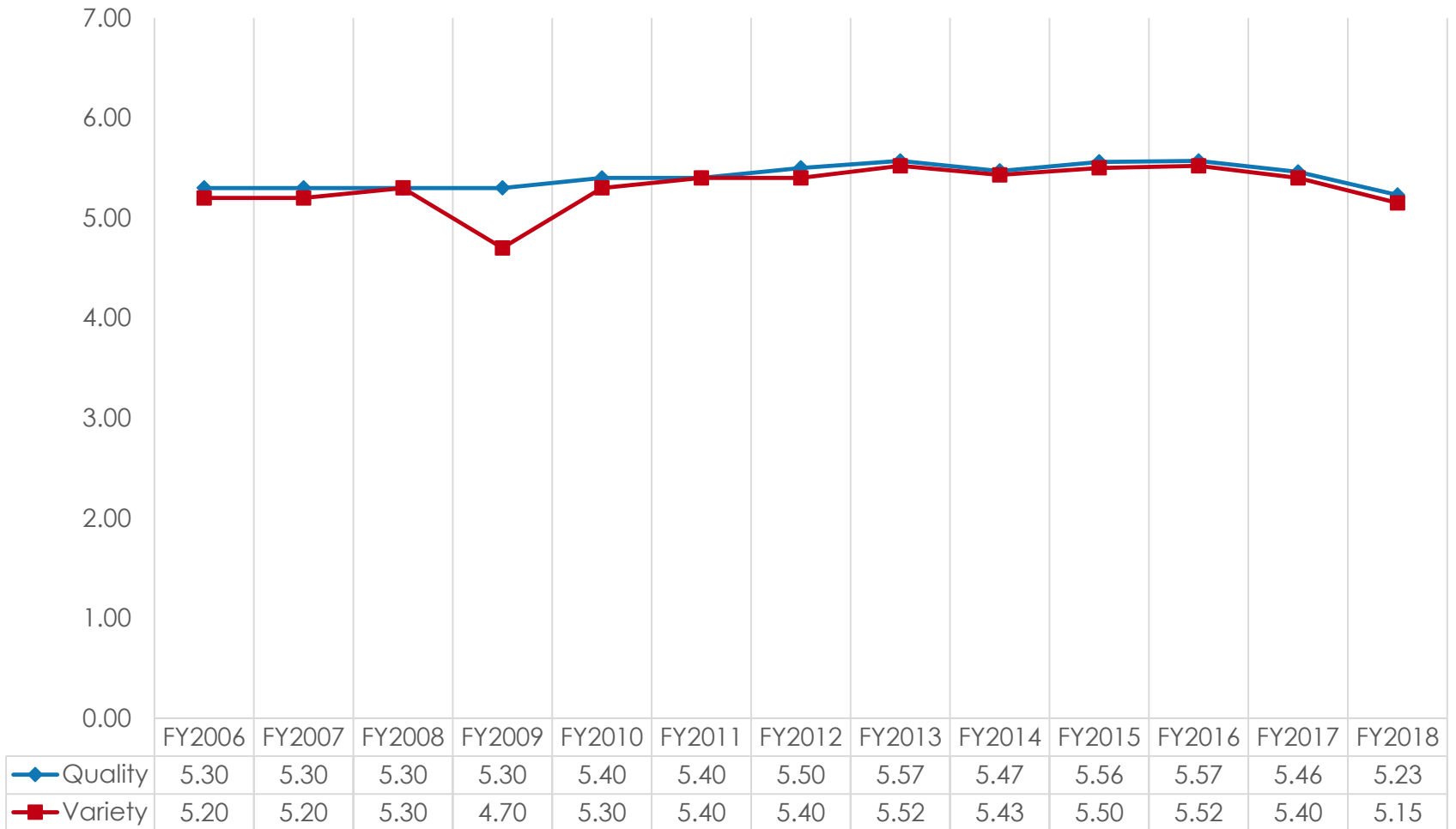


Optional Tour Satisfaction

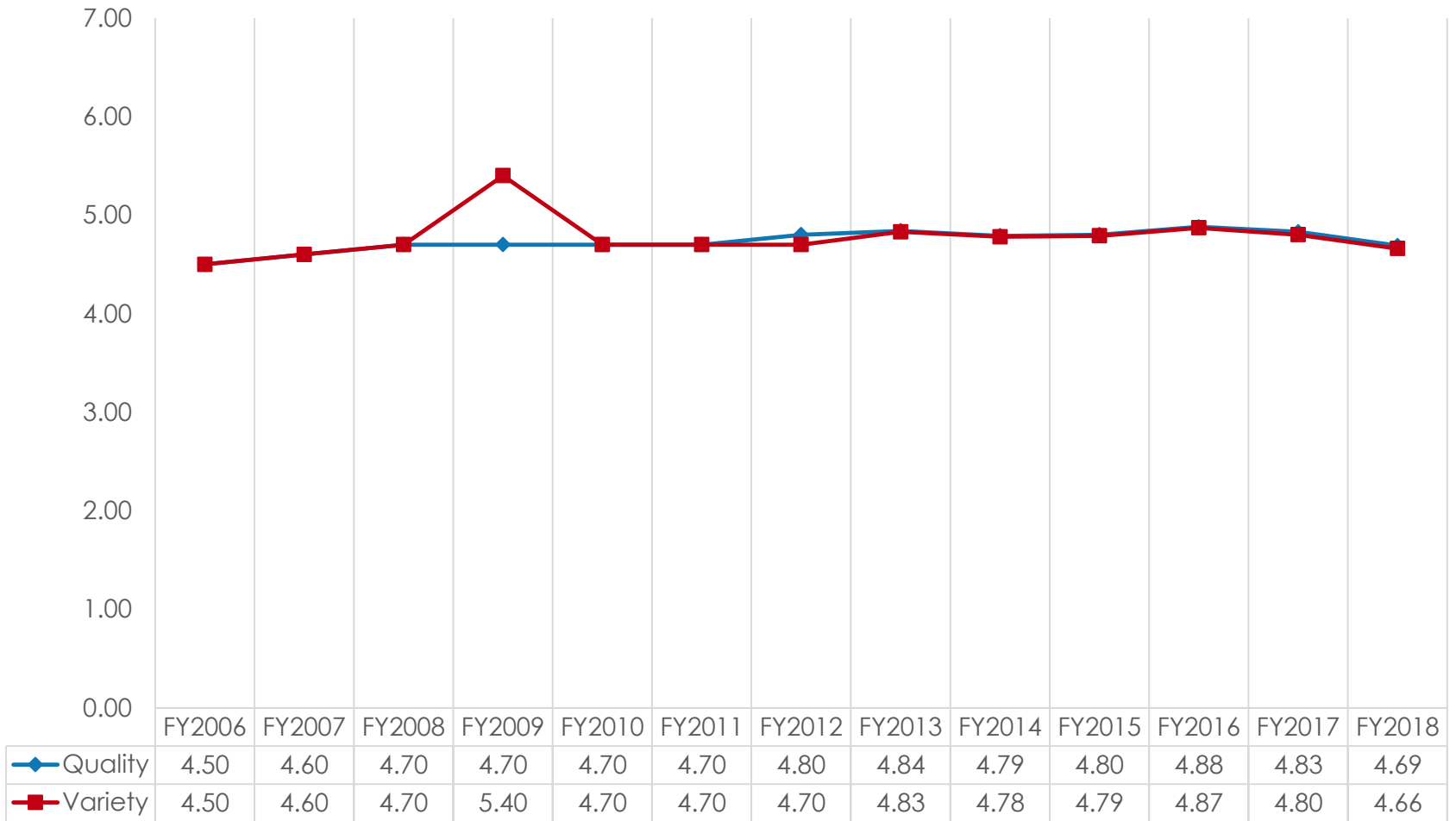
Top Responses only - Participation (5%+)



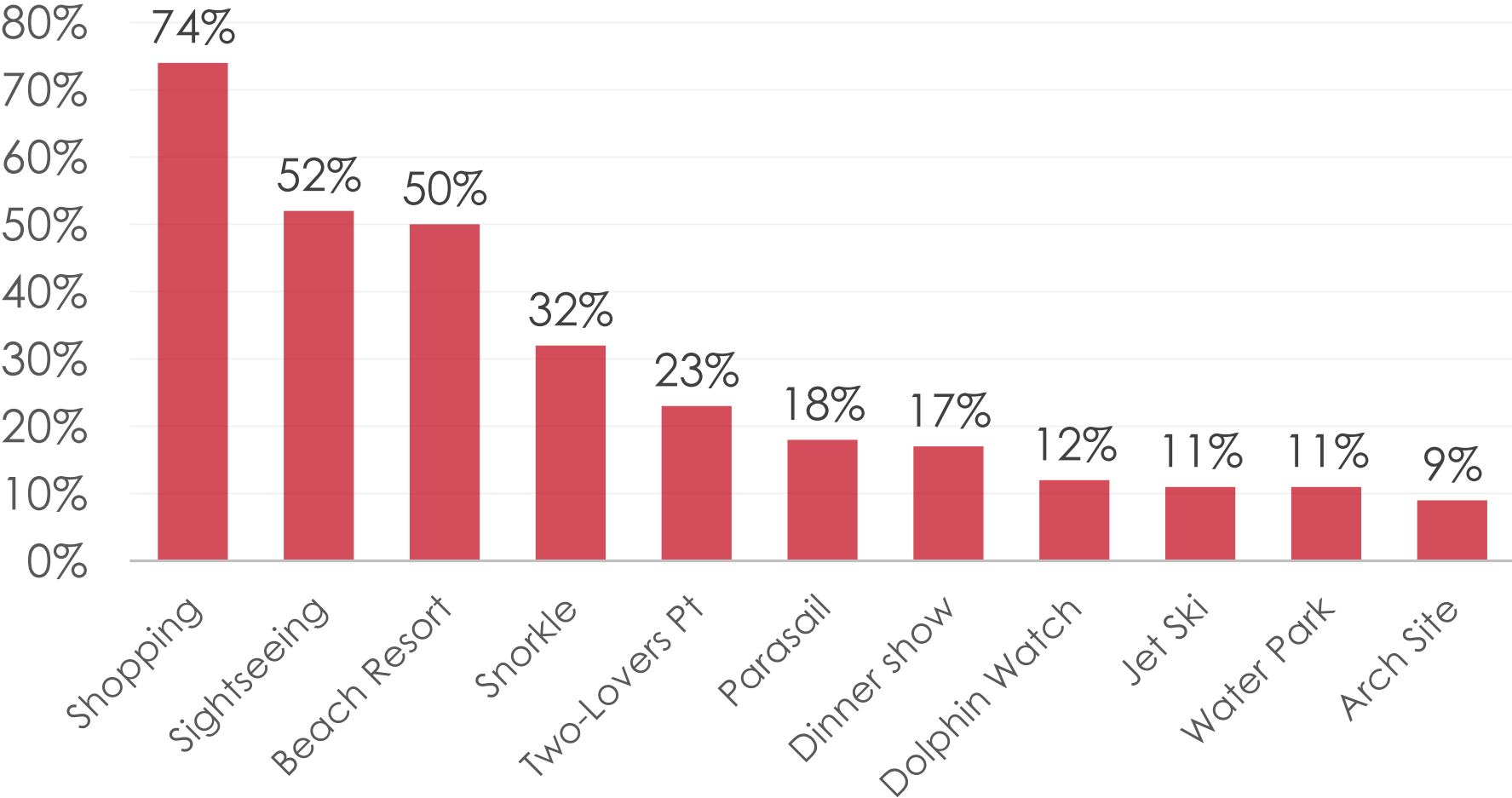
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

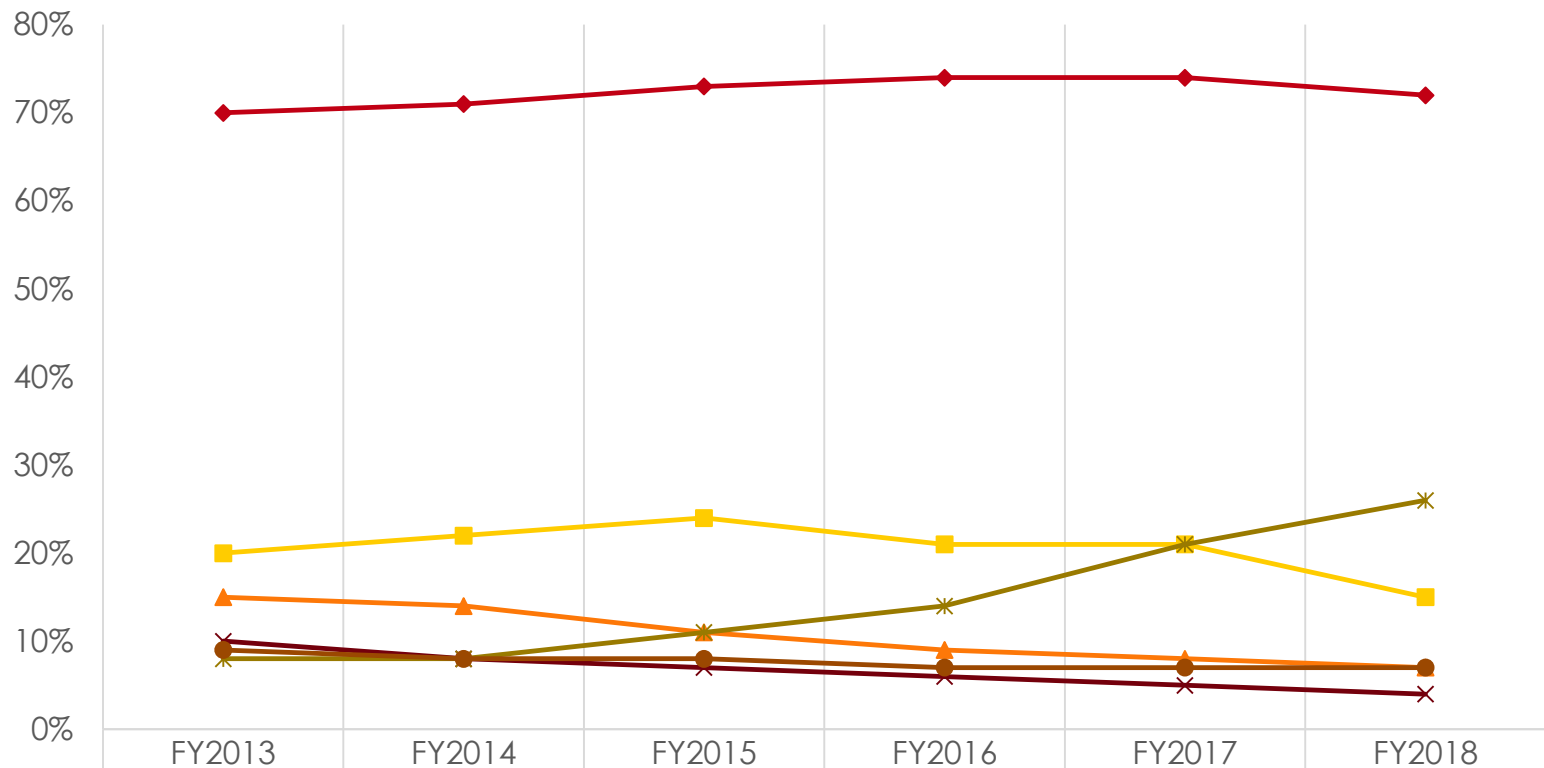


Activities Participation (Top Responses)



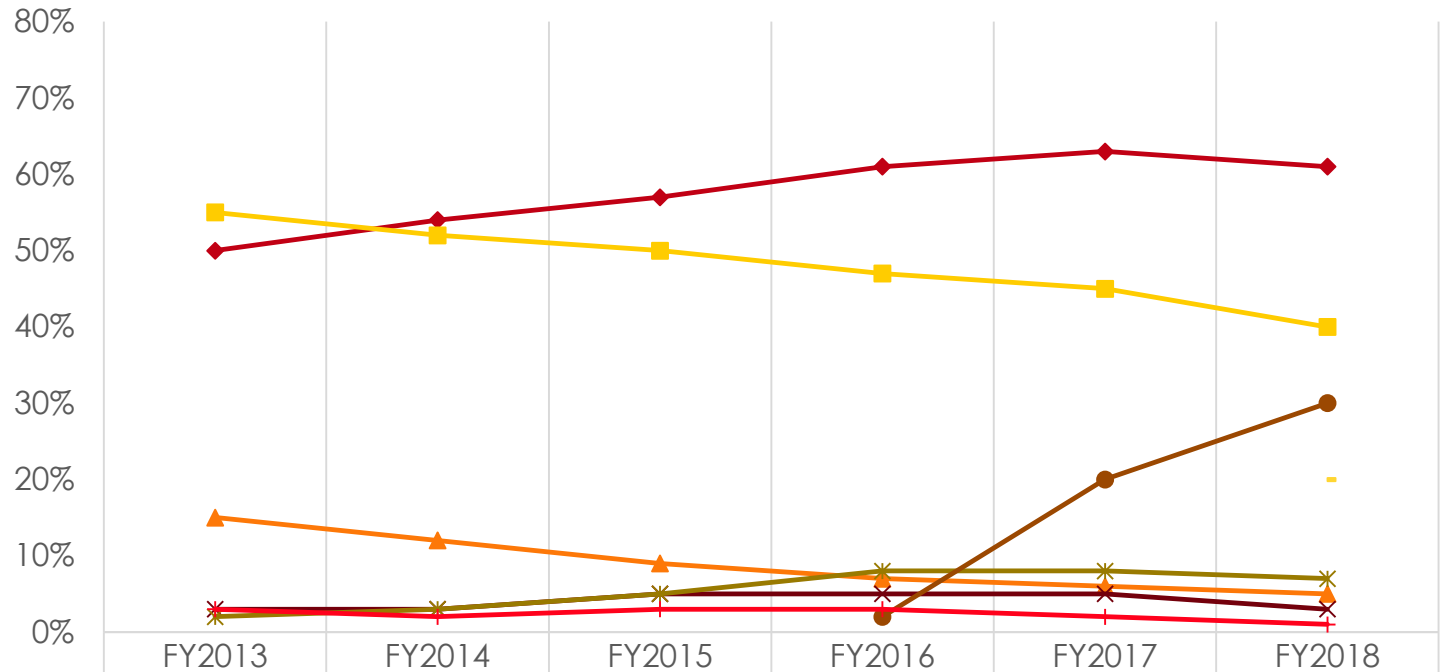
SECTION 5 PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



INTERNET- SOURCES OF INFORMATION

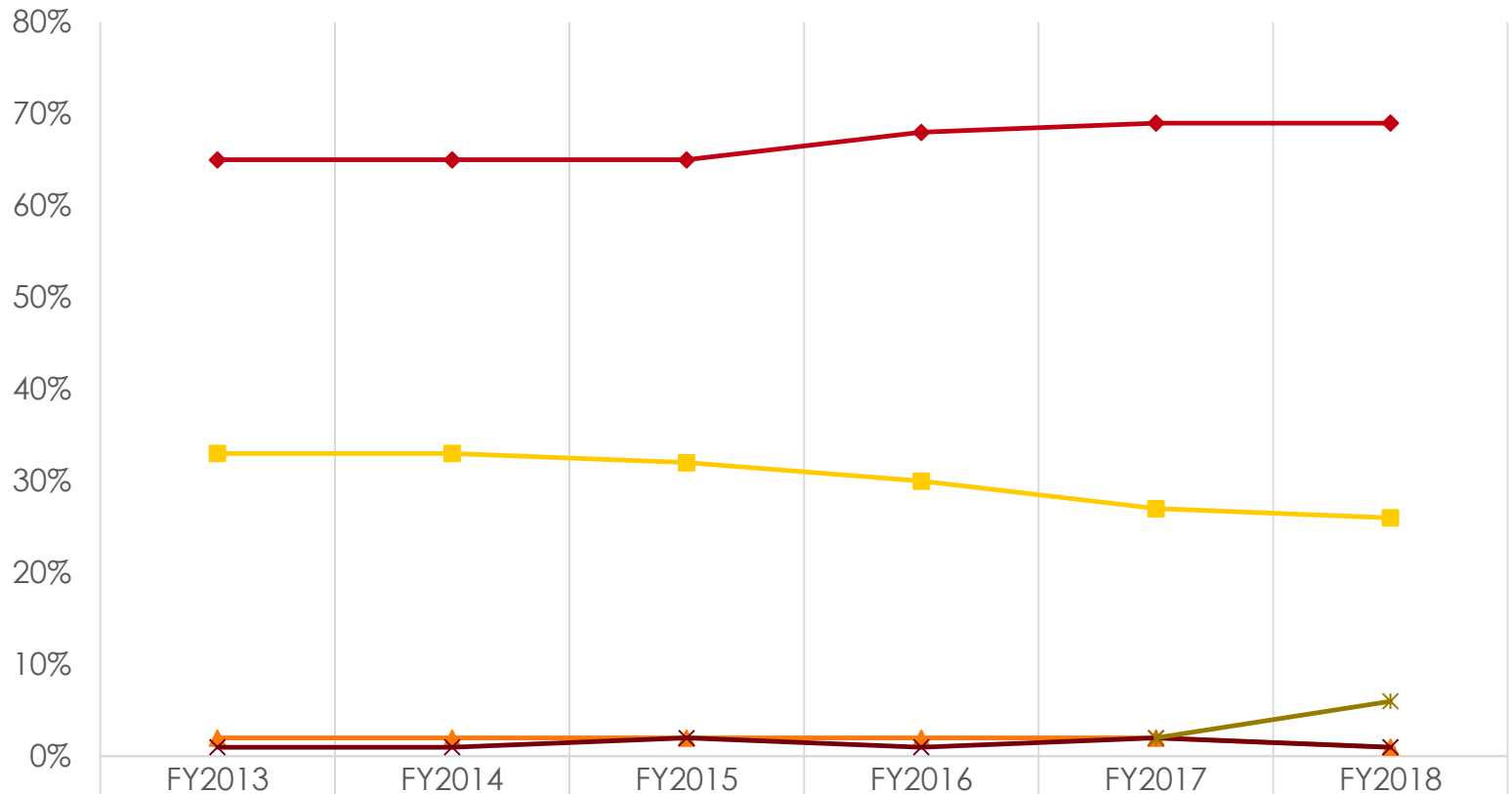
Things to do on Guam



◆ Google	50%	54%	57%	61%	63%	61%
■ Yahoo	55%	52%	50%	47%	45%	40%
▲ None	15%	12%	9%	7%	6%	5%
✕ Facebook	3%	3%	5%	5%	5%	3%
* Twitter	2%	3%	5%	8%	8%	7%
● Instagram				2%	20%	30%
⊢ Other	3%	2%	3%	3%	2%	1%
— Online Booking Tvl Site						20%

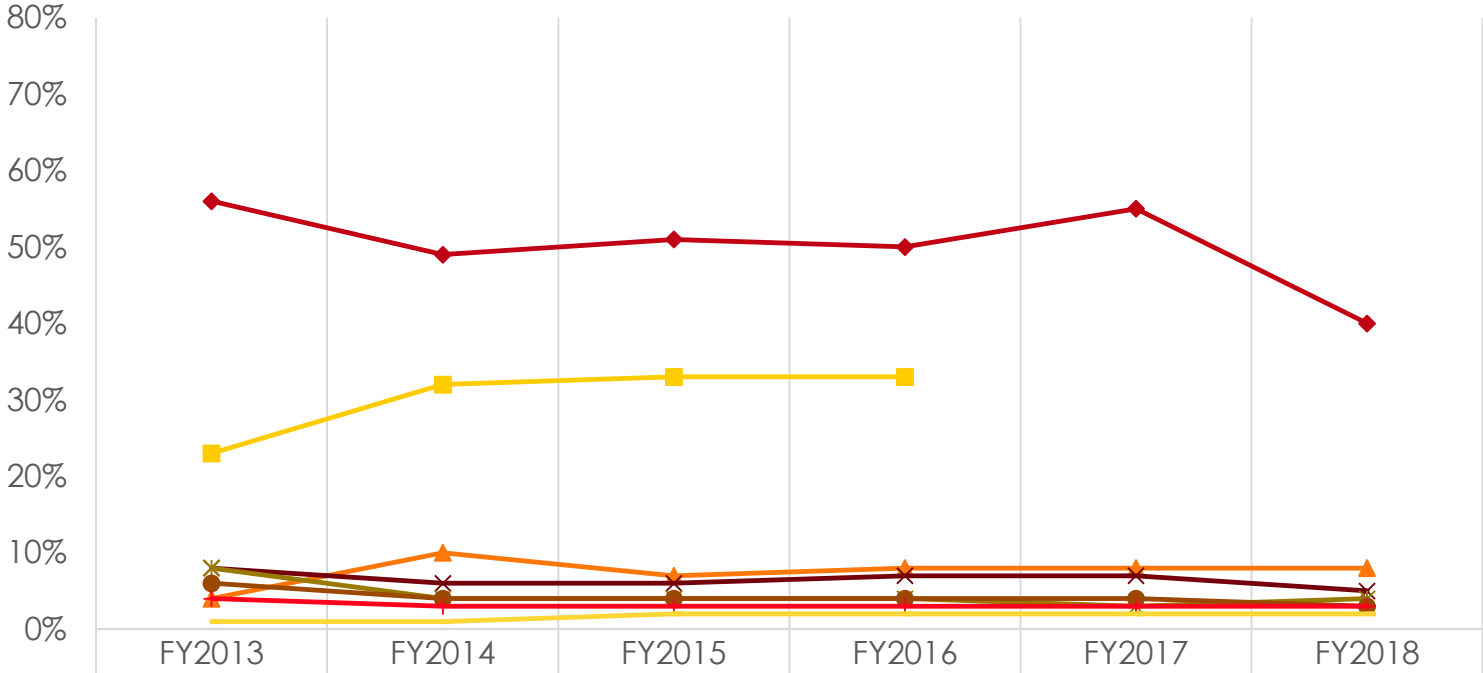
INTERNET- SOURCES OF INFORMATION

GVB



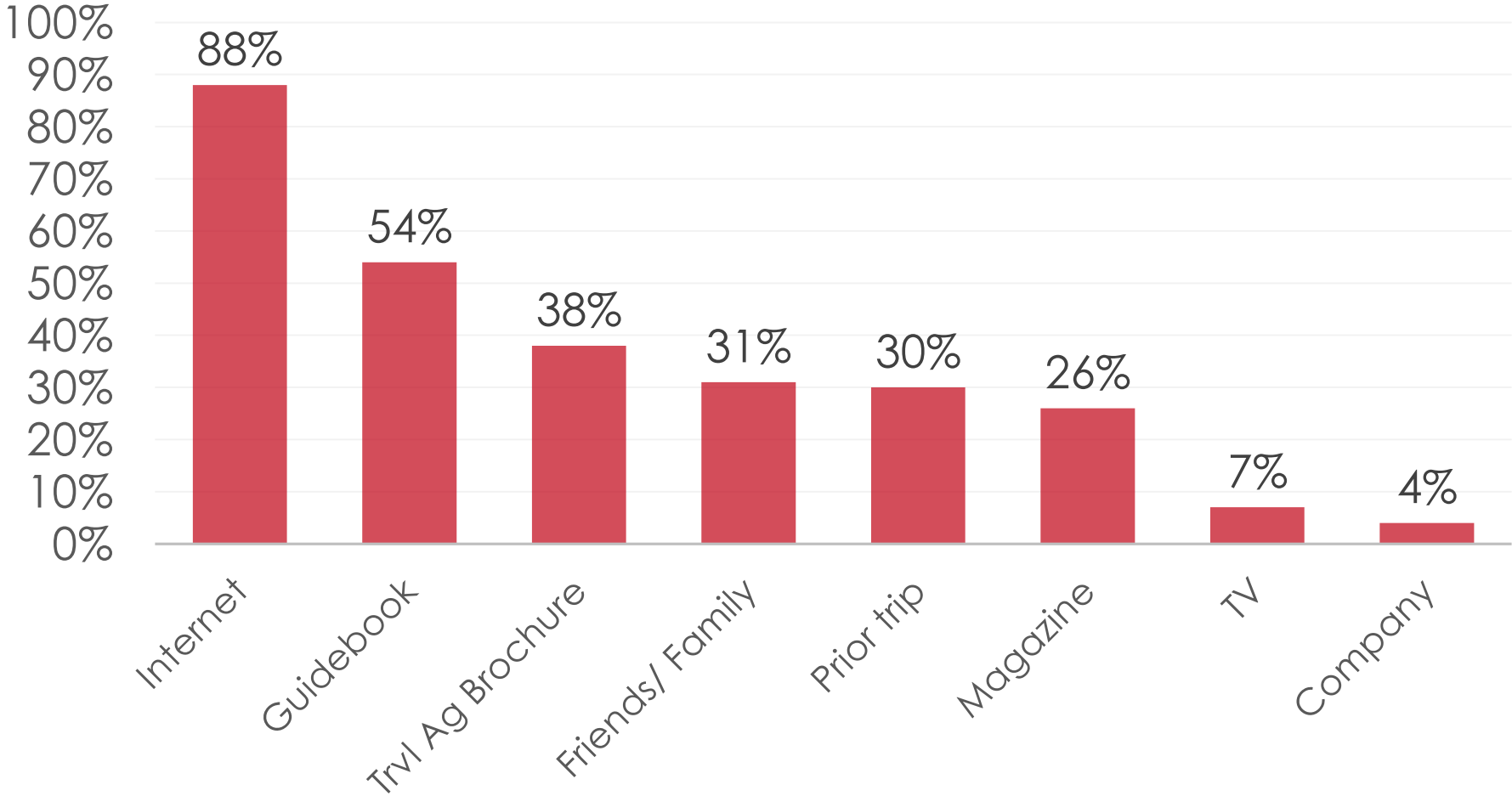
◆ None	65%	65%	65%	68%	69%	69%
■ GVB Website	33%	33%	32%	30%	27%	26%
▲ GVB Facebook	2%	2%	2%	2%	2%	1%
✕ GVB Twitter	1%	1%	2%	1%	2%	1%
✱ GVB Instagram					2%	6%

TRAVEL MOTIVATION



	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
Friends/ Family	56%	49%	51%	50%	55%	40%
Other	23%	32%	33%	33%		
Company/ Bus Trip	4%	10%	7%	8%	8%	8%
Internet	8%	6%	6%	7%	7%	5%
Travel show	8%	4%	4%	4%	3%	4%
Travel agent	6%	4%	4%	4%	4%	3%
Magazine	4%	3%	3%	3%	3%	3%
Social Media	1%	1%	2%	2%	2%	2%

PRE-ARRIVAL SOURCES OF INFORMATION

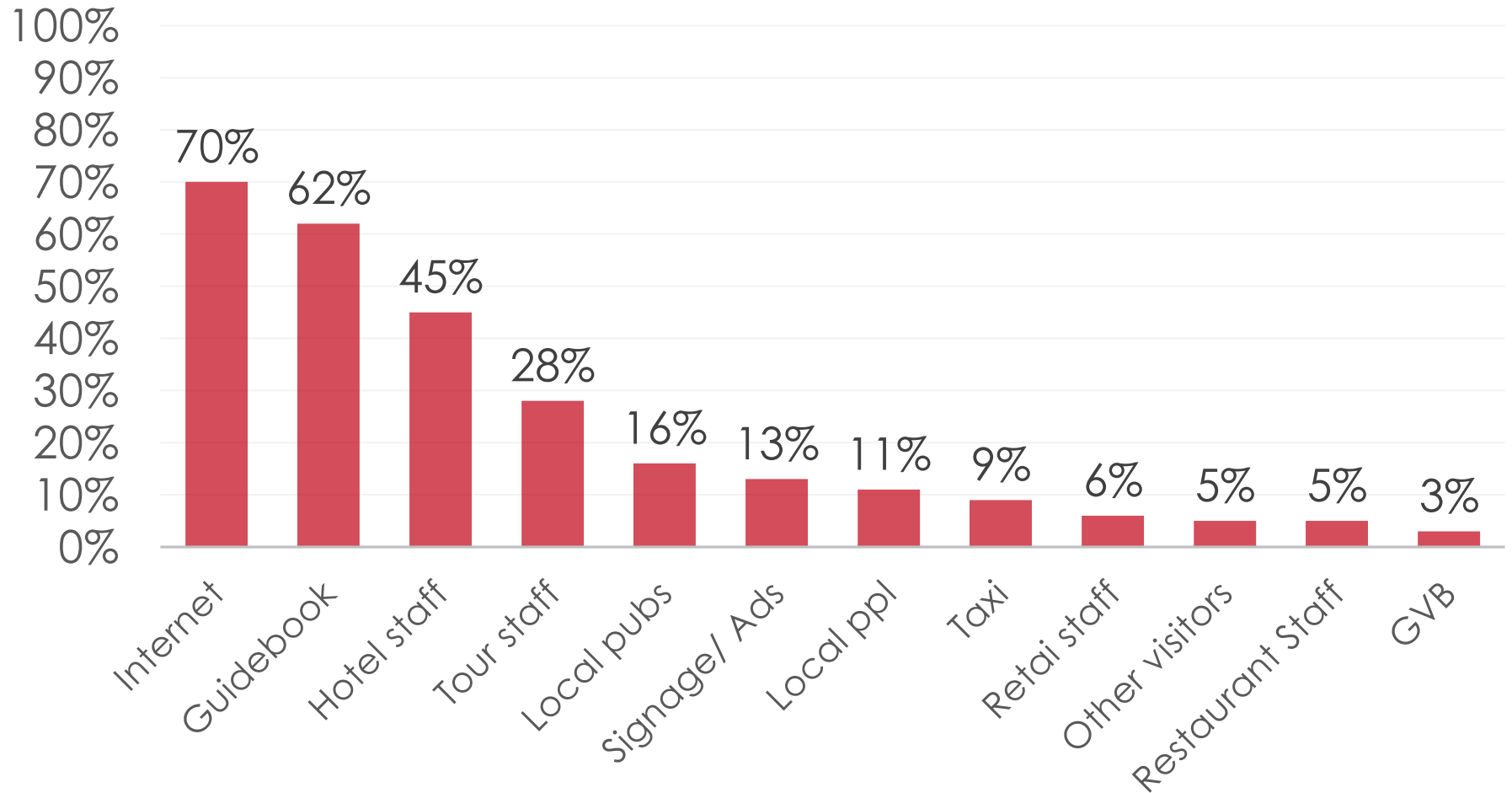


PRE-ARRIVAL SOURCES OF INFORMATION

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
Guide-book	43%	36%	41%	36%	34%	37%	39%	32%	27%	27%	26%	54%	54%
Internet	22%	28%	25%	30%	36%	34%	32%	33%	38%	42%	45%	87%	88%
Brochure	15%	16%	15%	15%	11%	12%	10%	9%	8%	Not Top 3	Not Top 3	39%	38%
Friend / Relative	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	8%	8%	Not top 3	Not top 3

ONISLE

SOURCES OF INFORMATION

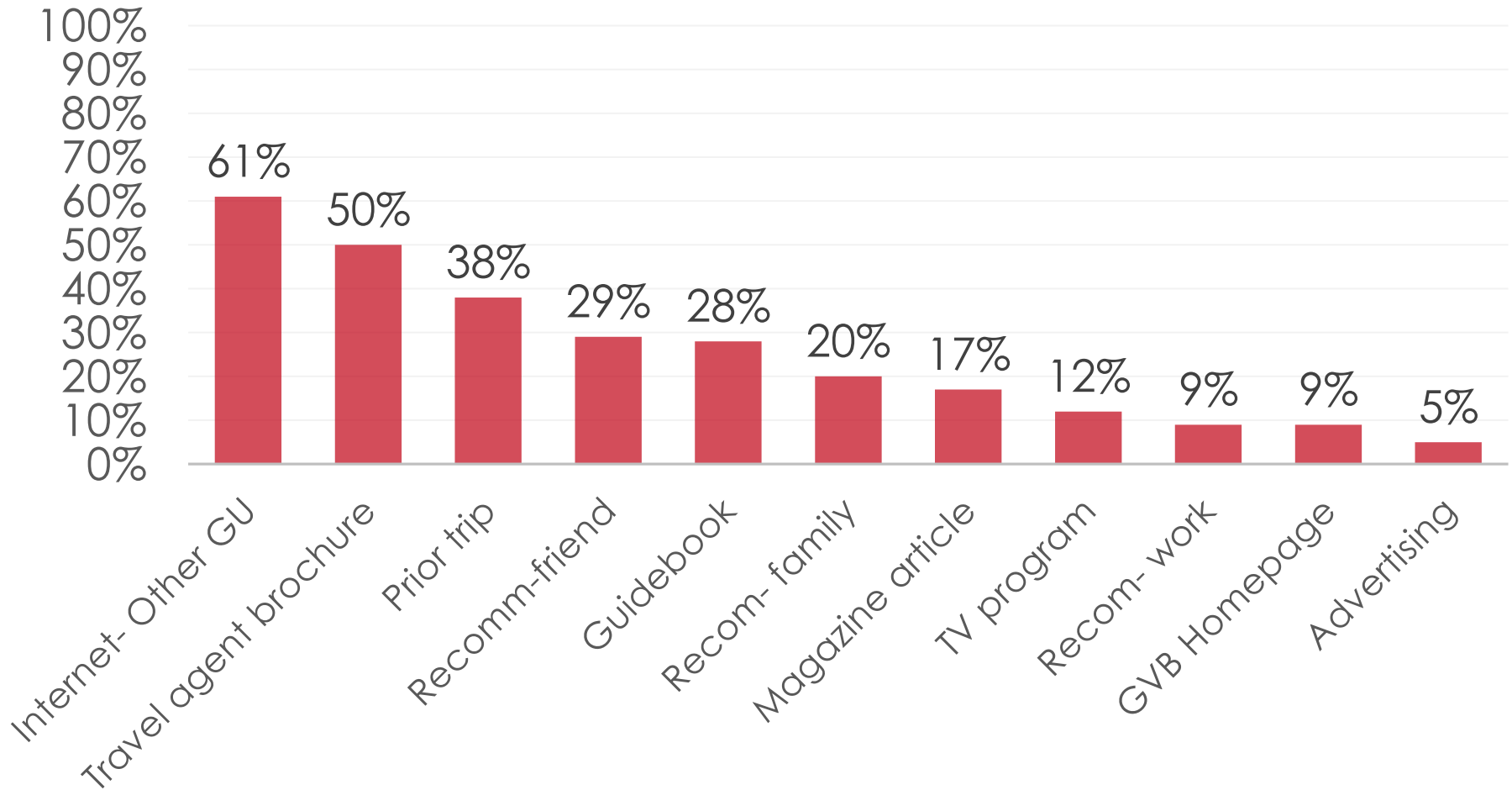


ON-ISLE SOURCES OF INFORMATION

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
Tour staff	46%	42%	44%	47%	44%	46%	40%	33%	31%	27%	22%	38%	Not top 3
Hotel staff	13%	16%	15%	17%	22%	22%	21%	25%	25%	22%	19%	50%	45%
Inter-net	NA	NA	NA	NA	NA	NA	NA	11%	18%	28%	37%	68%	70%
Guide-book	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	62%
Sign-age	6%	Not top 3	Not top 3	6%	7%	Not top 3	6%	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3
Vis Ch.	Not top 3	9%	10%	6%	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3
Local ppl	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	7%	6%	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3

SOURCES OF INFORMATION

TRIP INFLUENCERS



SOURCES OF INFORMATION

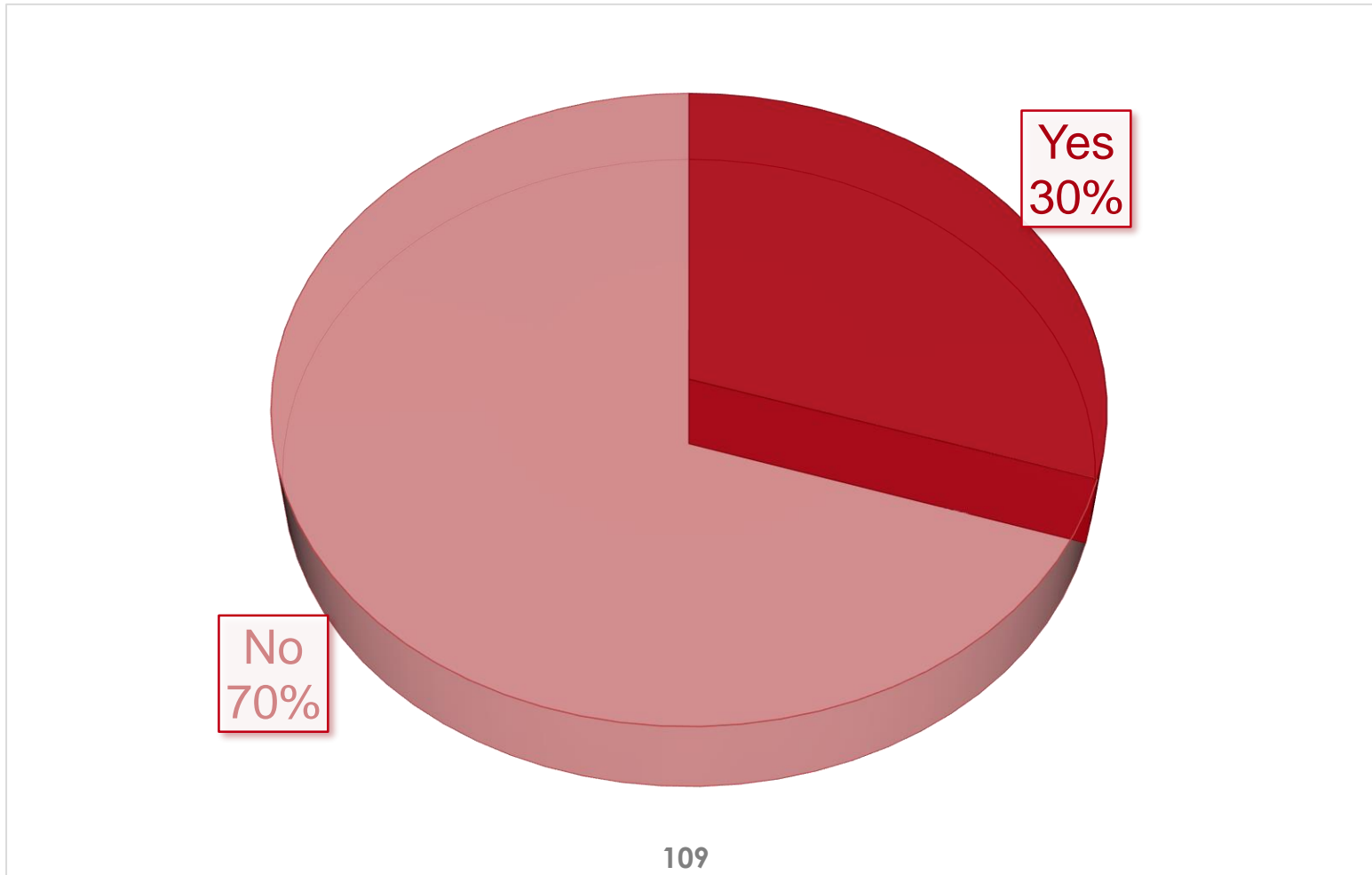
TRIP INFLUENCERS – KEY SEGMENTS

	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
Prior Trip	18%	21%	21%	21%	38%	38%
Travel agent brochure	22%	19%	19%	17%	43%	50%
Internet-Other Guam	15%	16%	19%	21%	56%	61%

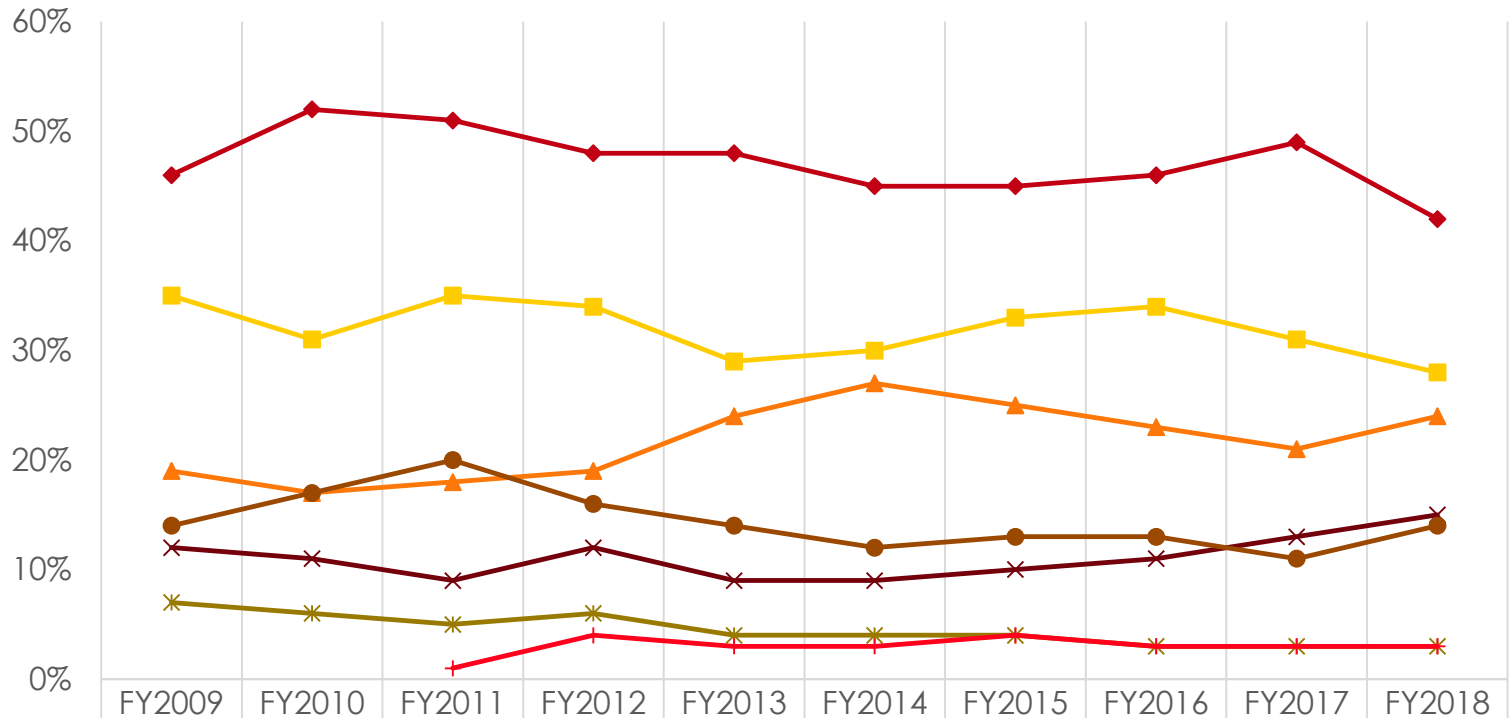
SECTION 6

FUTURE TRAVEL TO GUAM

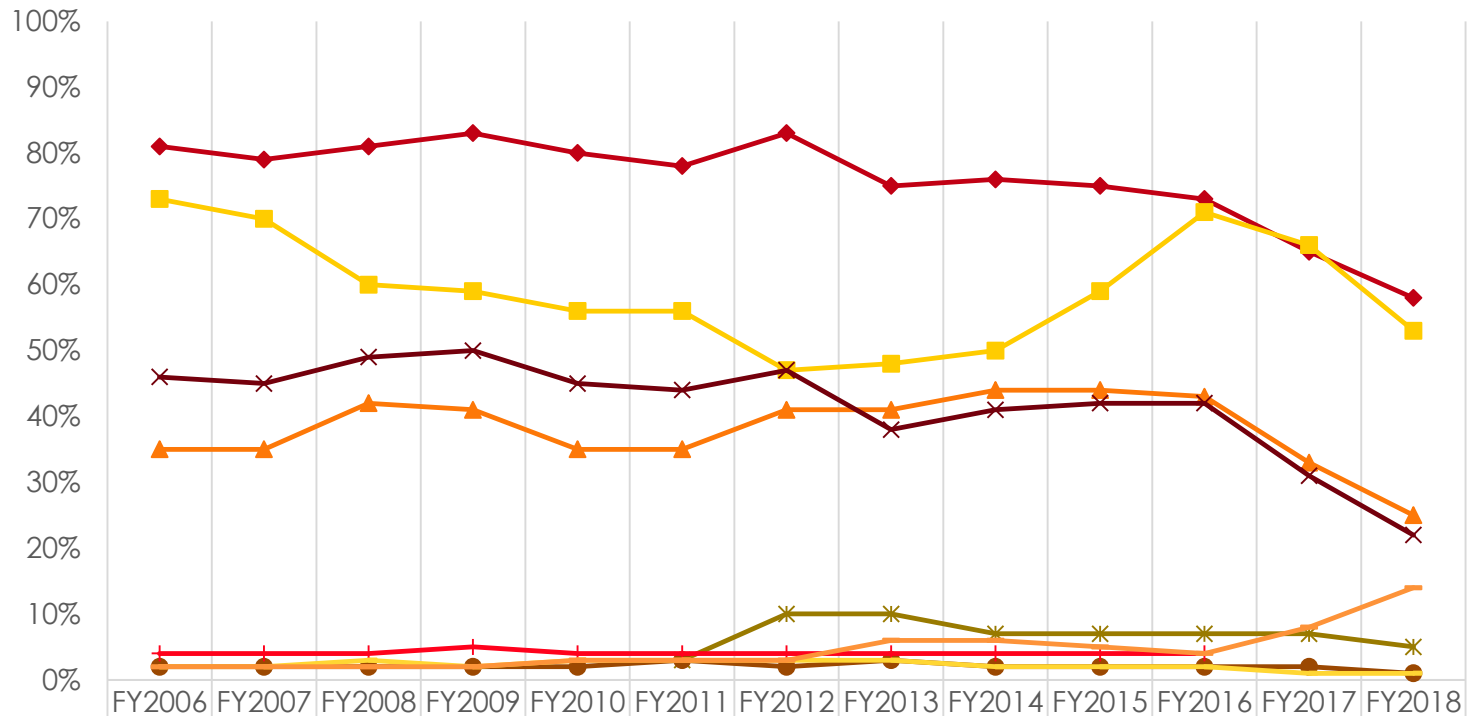
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



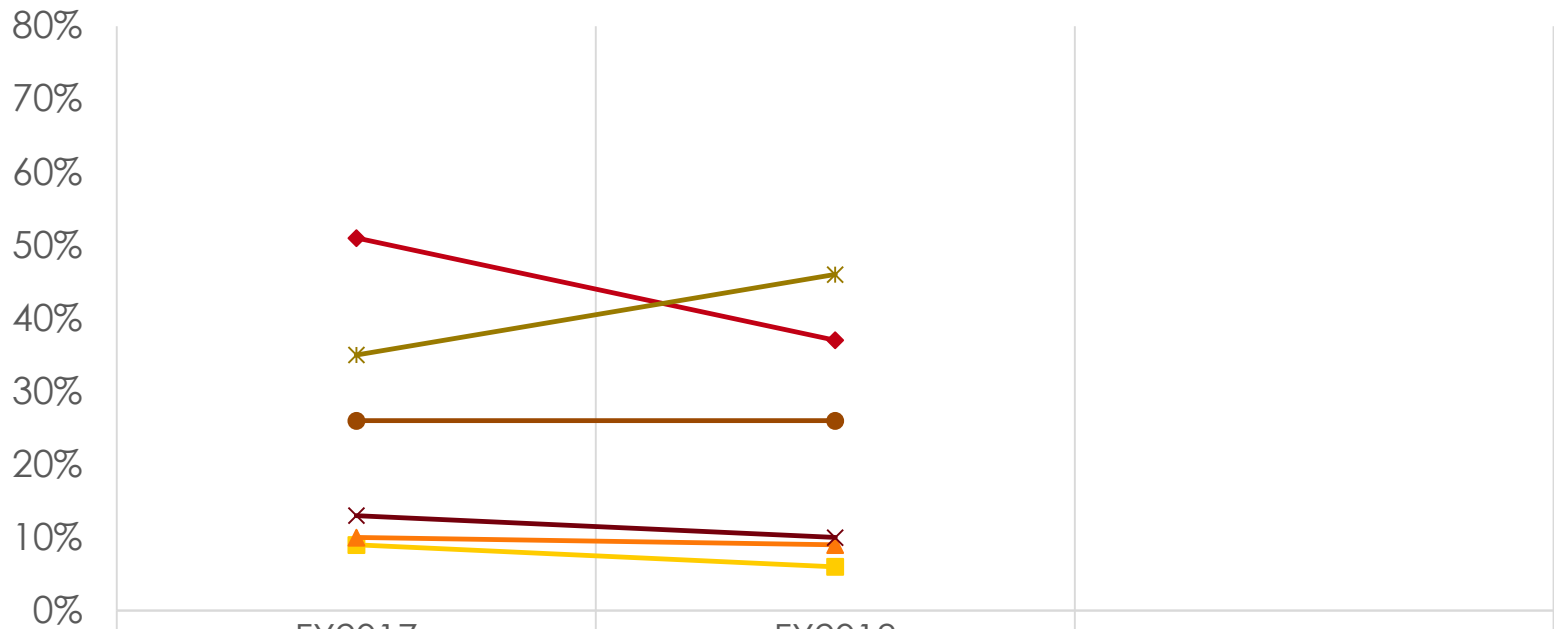
FUTURE TRAVEL CONCERNS



SECTION 7

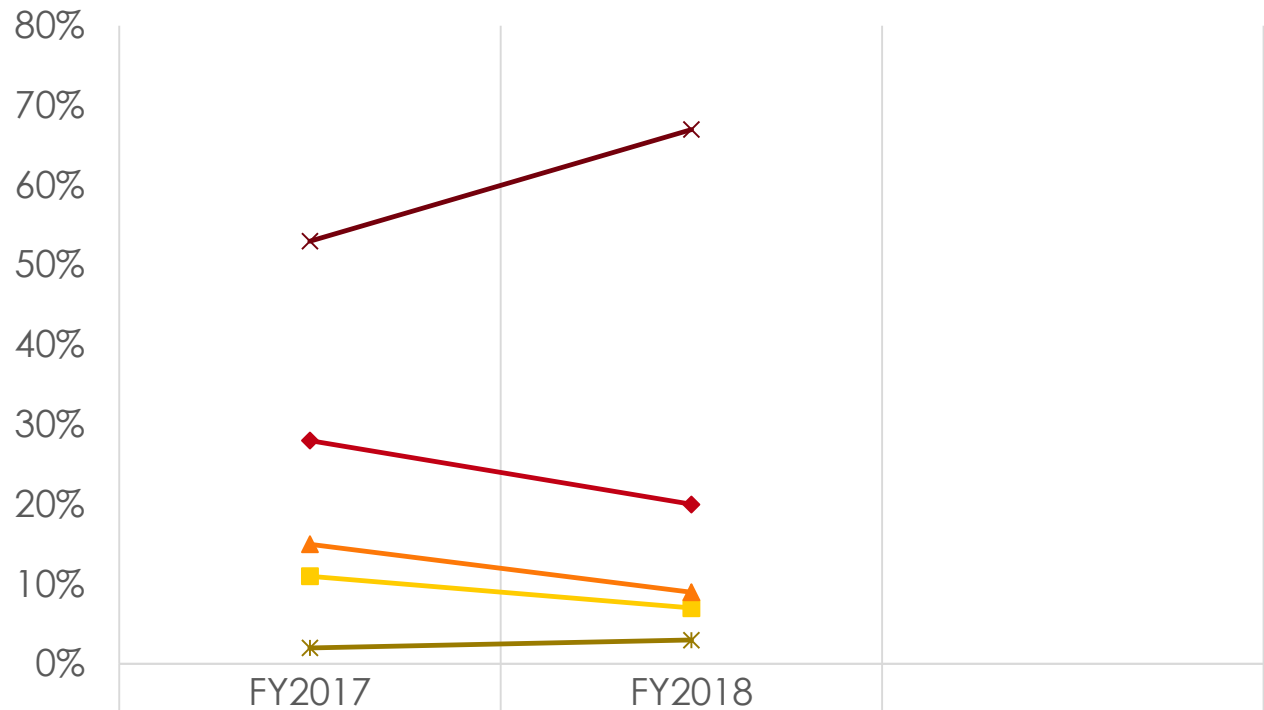
GUAM CULTURE

EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT



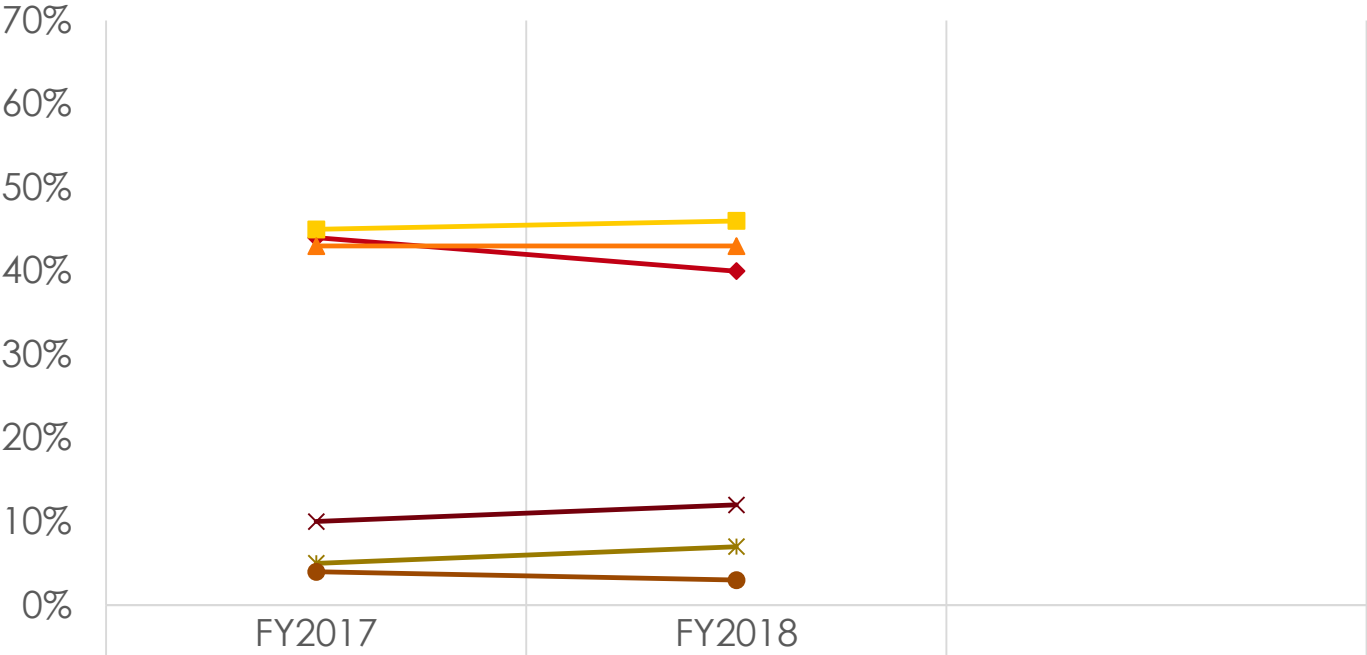
◆ Beaches	51%	37%
■ Local music	9%	6%
▲ Local people	10%	9%
✕ Night market	13%	10%
* None	35%	46%
● Local food	26%	26%

EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



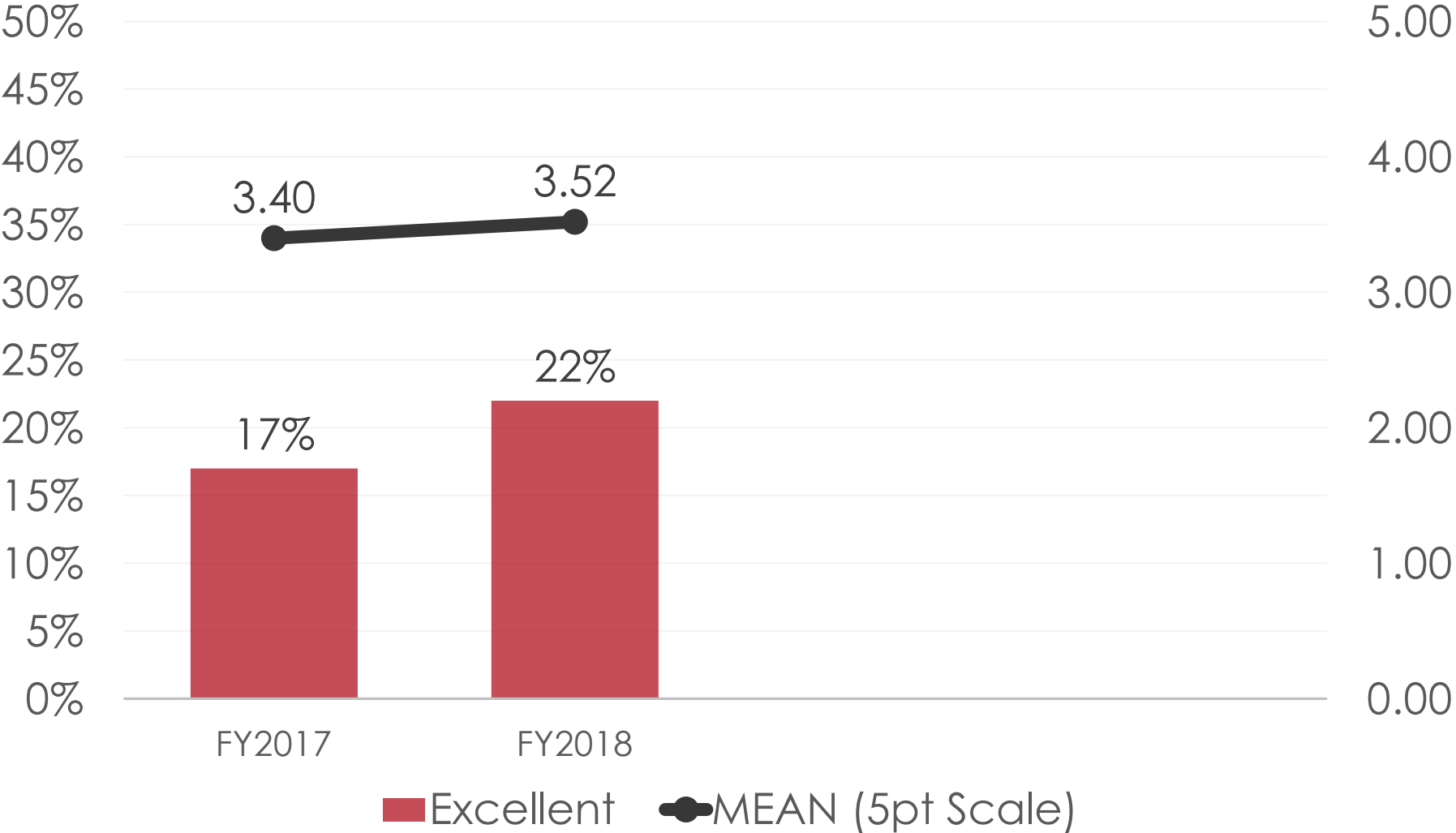
◆ 2-Lovers Pt	28%	20%
■ Chamorro Cult Entertainment	11%	7%
▲ Chamorro Village	15%	9%
× None	53%	67%
* Guam Museum	2%	3%

SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS

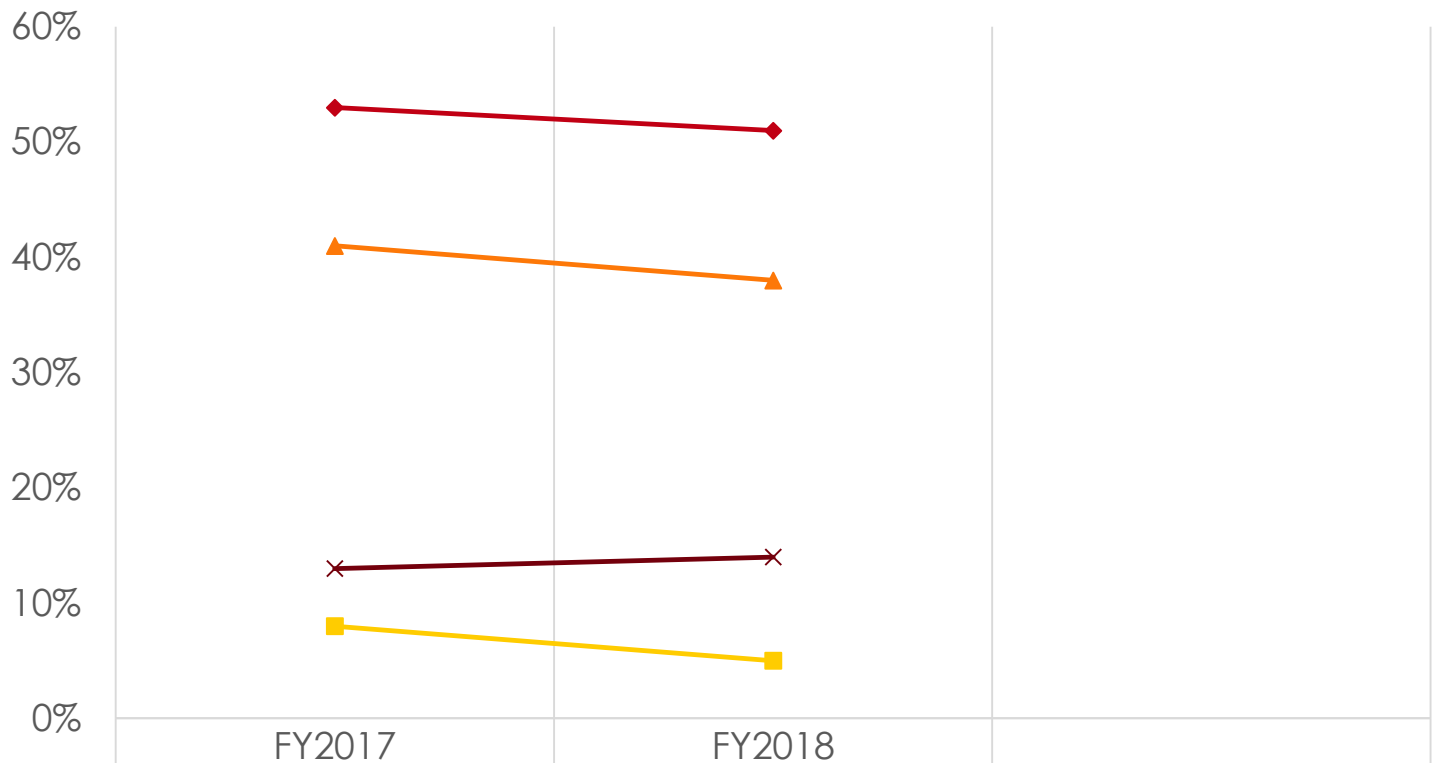


◆ Internet	44%	40%
■ Travel agency	45%	46%
▲ Guides/ Brochures	43%	43%
✕ Family/ friends	10%	12%
* Hotel staff	5%	7%
● Newspaper/ Magazine	4%	3%

SATISFACTION- CULTURAL ACTIVITY/EVENTS



OBSTACLES- CULTURAL ACTIVITY/EVENTS



◆ Scheduling	53%	51%
■ Did not know where	8%	5%
▲ Unaware	41%	38%
✕ Did not want to	13%	14%

SECTION 8

ADVANCED STATISTICS

Analysis Technique

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ($p \leq .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Drivers of Overall Satisfaction

Comparison of Drivers of Overall Satisfaction, Annual 2018	
	Annual 2018 rank
Drivers:	
Quality & Cleanliness of beaches & parks	3
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	5
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	7
Quality of shopping	
Variety of shopping	4
Price of things on Guam	
Quality of hotel accommodations	2
Quality/cleanliness of air, sky	6
Quality/cleanliness of parks	10
Quality of landscape in Tumon	9
Quality of landscape in Guam	1
Quality of ground handler	8
Quality/cleanliness of transportation vehicles	
% of Overall Satisfaction Accounted For	52.8%
NOTE: Only significant drivers are included.	

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japan visitor's experience on Guam is driven by ten significant factors in the 2018 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Quality of hotel accommodations,**
 - **Quality & cleanliness of beaches & parks,**
 - **Variety of shopping,**
 - **Quality of day time tours,**
 - **Quality/cleanliness of air, sky,**
 - **Variety of night time tours,**
 - **Quality of ground handler,**
 - **Quality of landscape in Tumon, and**
 - **Quality/cleanliness of parks.**
- With all ten factors the overall r^2 is .528 meaning that **52.8% of overall satisfaction is accounted for by these factors.**

Drivers of On Isle Expenditures

Comparison of Drivers of Per Person On-Island Expenditures, Annual 2018	
Drivers:	Annual 2018 rank
Quality & Cleanliness of beaches & parks	6
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	2
Quality of shopping	1
Variety of shopping	
Price of things on Guam	4
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	5
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	3
% of Per Person On Island Expenditures Accounted For	1.0%
NOTE: Only significant drivers are included.	

Drivers of On-Isle Expenditures

- **Per Person On Isle Expenditures** of Japan visitor's on Guam is driven by six significant factors in the 2018 Period. By rank order they are:
 - **Quality of shopping,**
 - **Variety of night time tours,**
 - **Quality/cleanliness of transportation vehicles,**
 - **Price of things on Guam,**
 - **Quality of landscape in Tumon, and**
 - **Quality & cleanliness of beaches & parks.**
- With these factors, the overall r^2 is .010 meaning that **1.0% of per person on island expenditure is accounted for by these factors.**