



# **GUAM VISITORS BUREAU**

## **Japan Visitor Tracker Exit Profile**

### **FY2016**

### **AUGUST 2016**



**Prepared by: QMark Research**

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# Background & Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **352** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.23 percentage points.

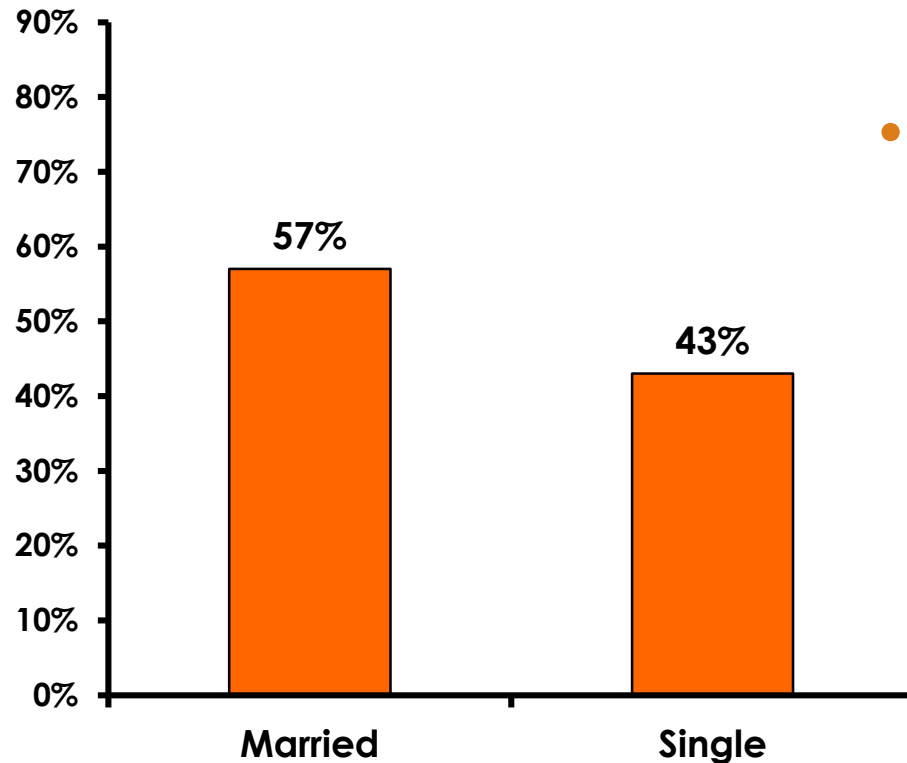
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# OBJECTIVES

- 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.

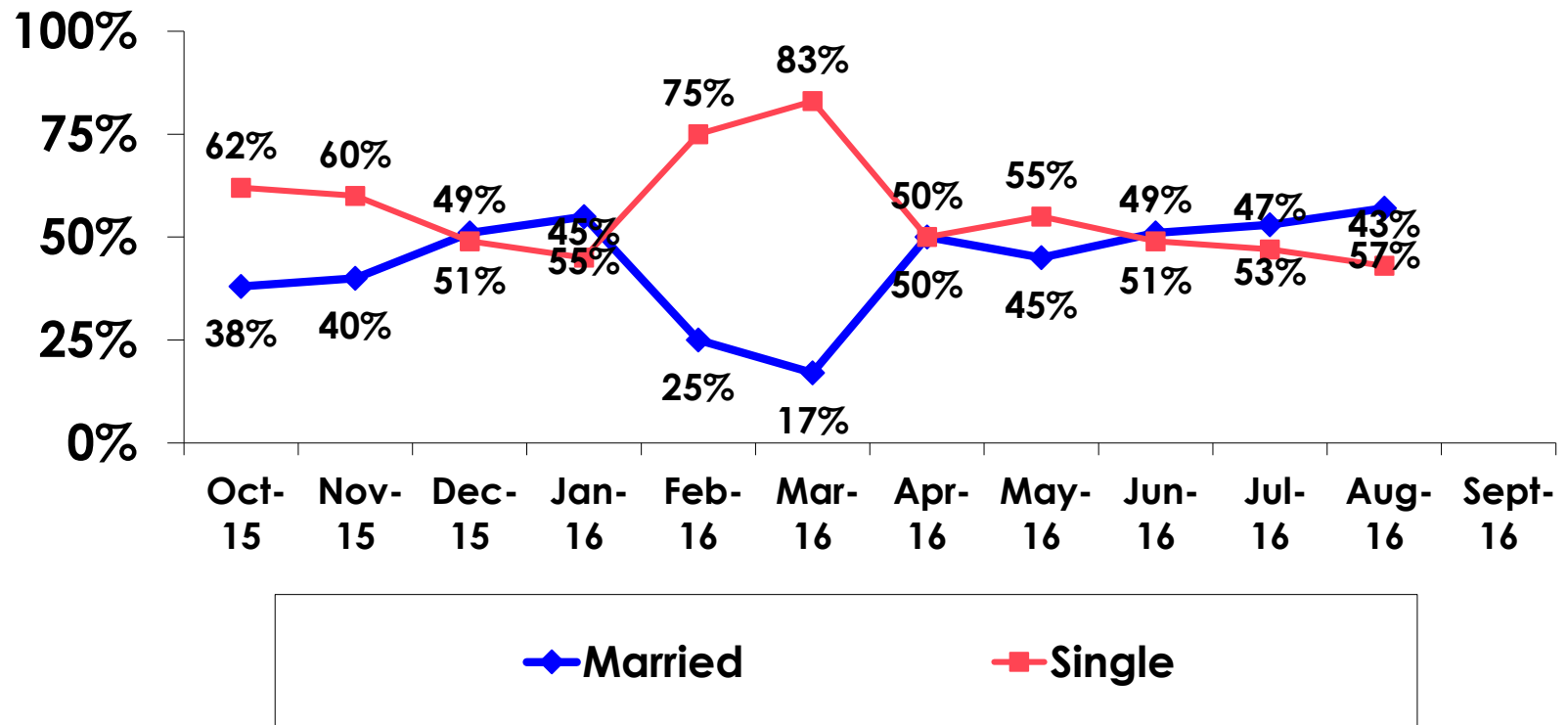
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

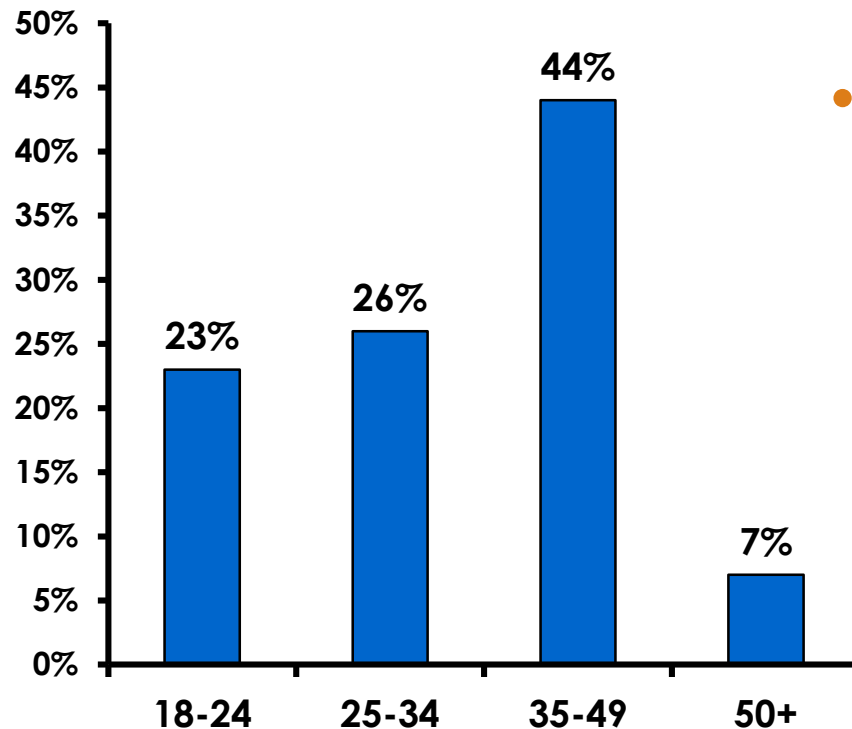


- 70% of repeat visitors this month were married.

# MARITAL STATUS

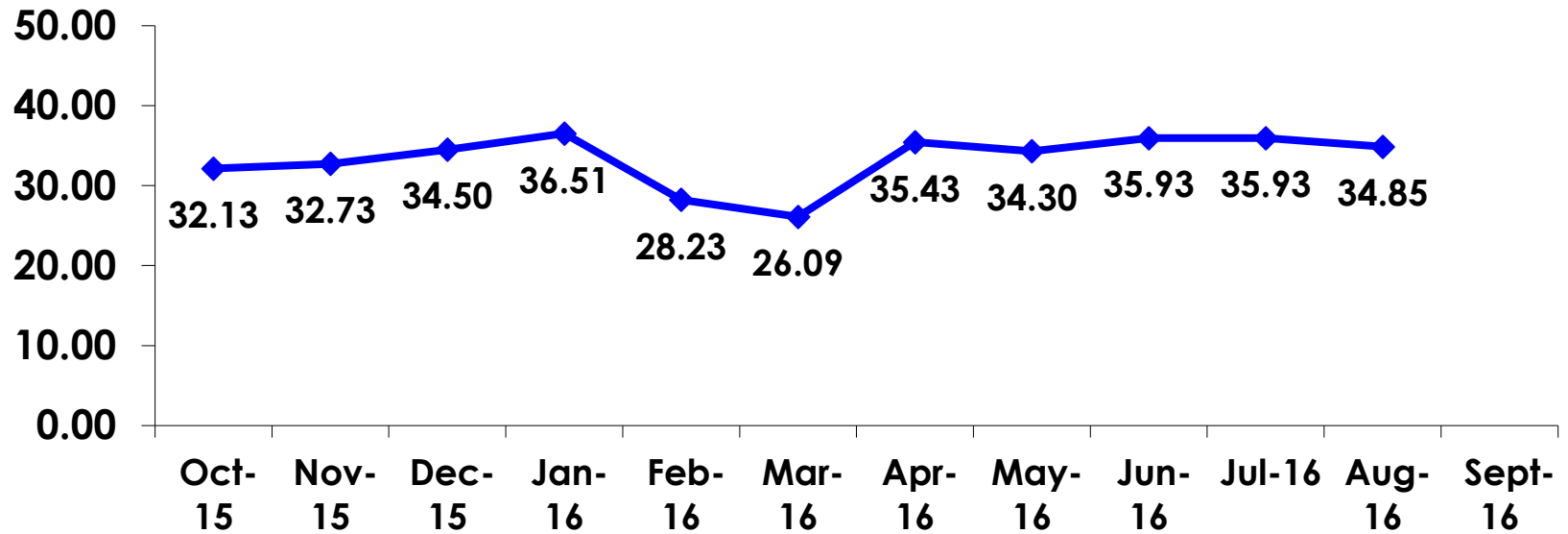


# Age - Overall



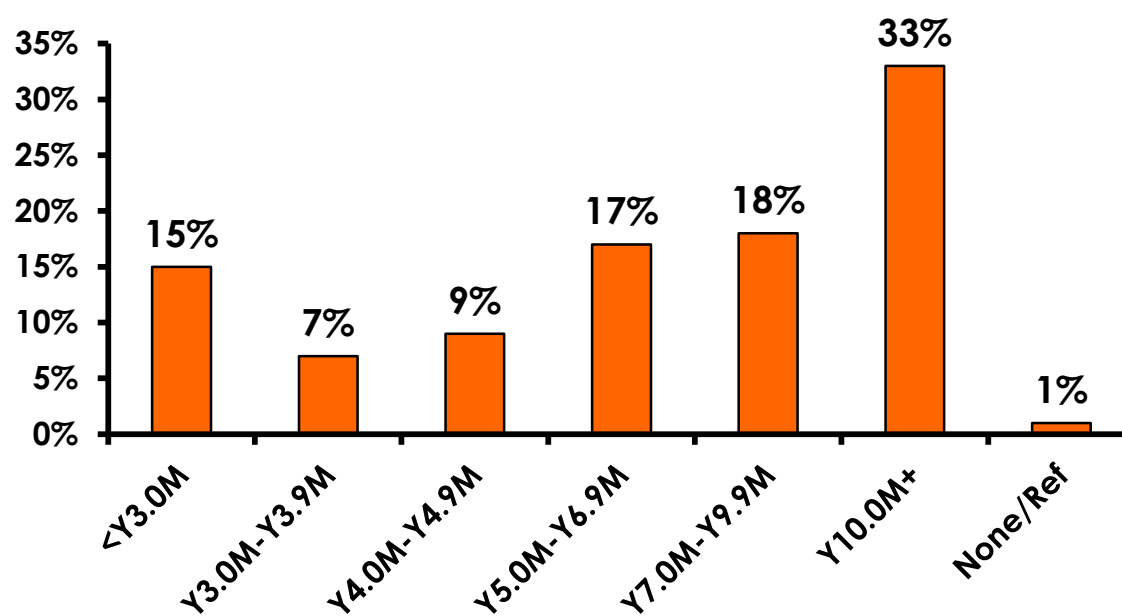
- The average age of the respondents is 34.85 years of age.

# AVERAGE - AGE



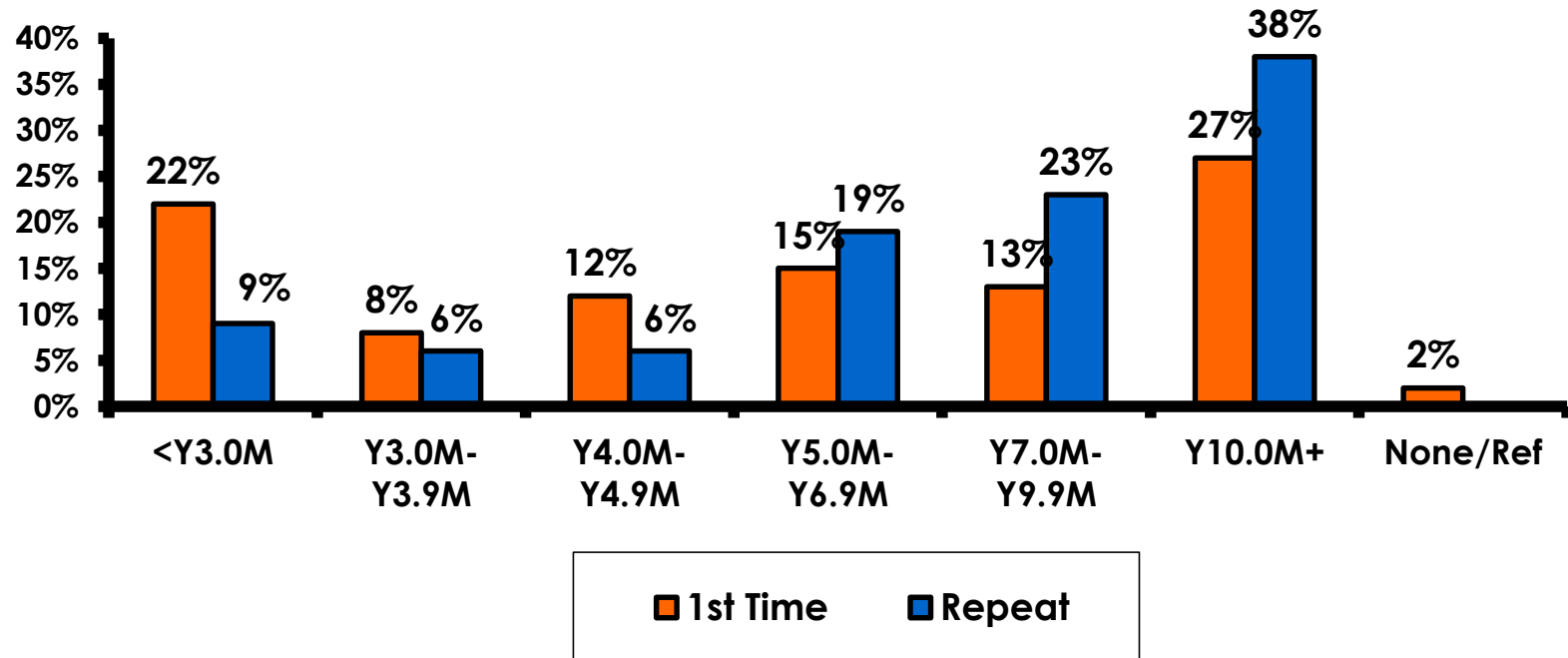


# Personal Income



• ¥101.12=\$1

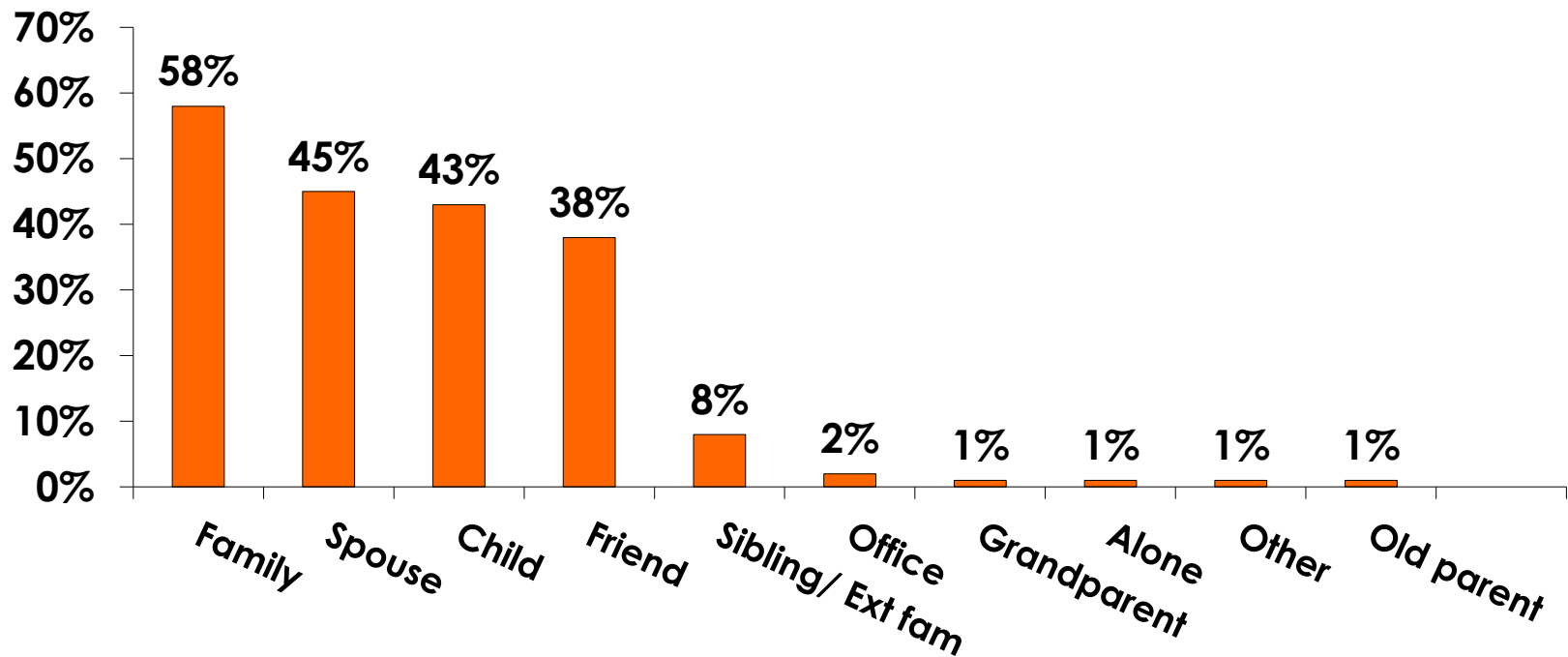
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	18	4	14	6	9	2	1
		Column N %	6%	3%	10%	10%	12%	1%	4%
	Y2.0M-Y3.0M	Count	28	6	22	11	12	5	
		Column N %	9%	4%	15%	19%	16%	3%	
	Y3.0M-Y4.0M	Count	21	5	16	8	9	3	1
		Column N %	7%	3%	11%	14%	12%	2%	4%
	Y4.0M-Y5.0M	Count	27	15	12	2	13	9	2
		Column N %	9%	9%	8%	3%	17%	6%	8%
	Y5.0M-Y7.0M	Count	52	33	19	9	15	23	5
		Column N %	17%	21%	13%	15%	20%	16%	21%
	Y7.0M-Y10.0M	Count	55	34	21	5	5	41	4
		Column N %	18%	21%	15%	8%	7%	28%	17%
	Y10.0M+	Count	99	61	38	15	12	61	11
		Column N %	33%	38%	27%	25%	16%	42%	46%
	No Income	Count	3	2	1	3			
		Column N %	1%	1%	1%	5%			
	Total	Count	303	160	143	59	75	144	24

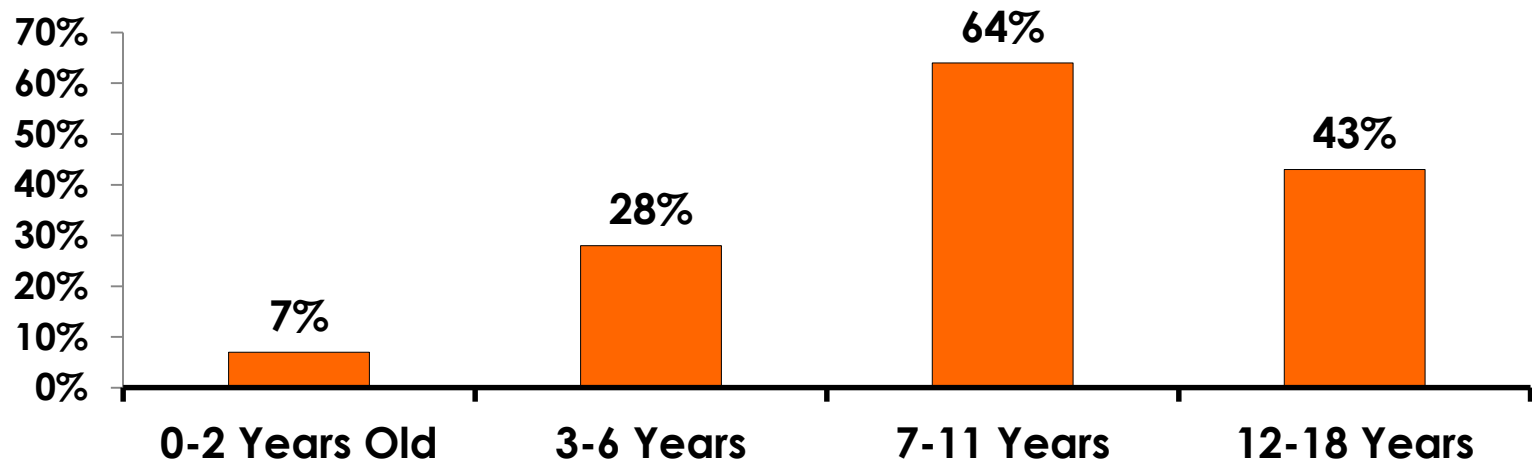
# Travel Companions



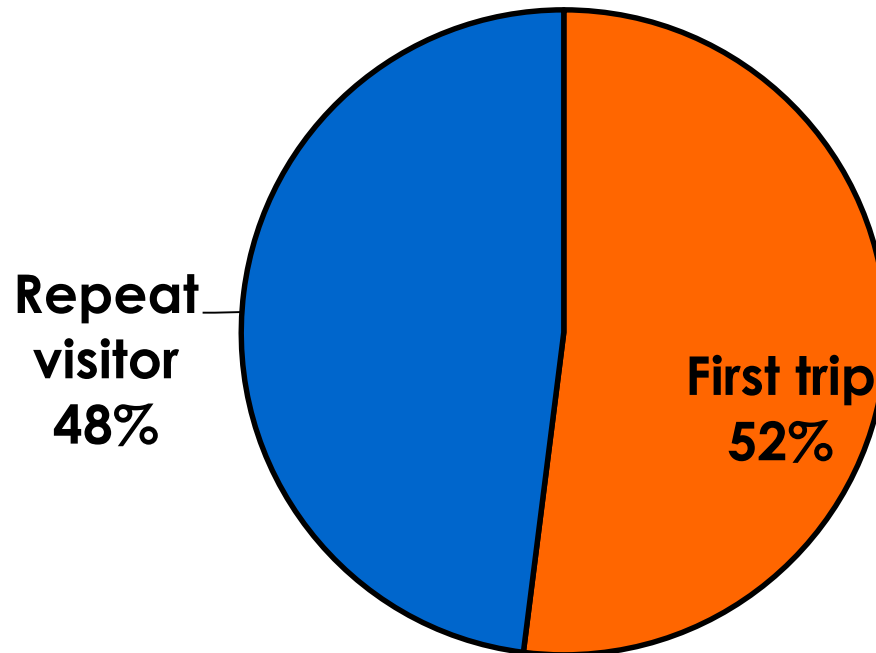
# Number of Children Travel Party

N=151 total respondents traveling with children.

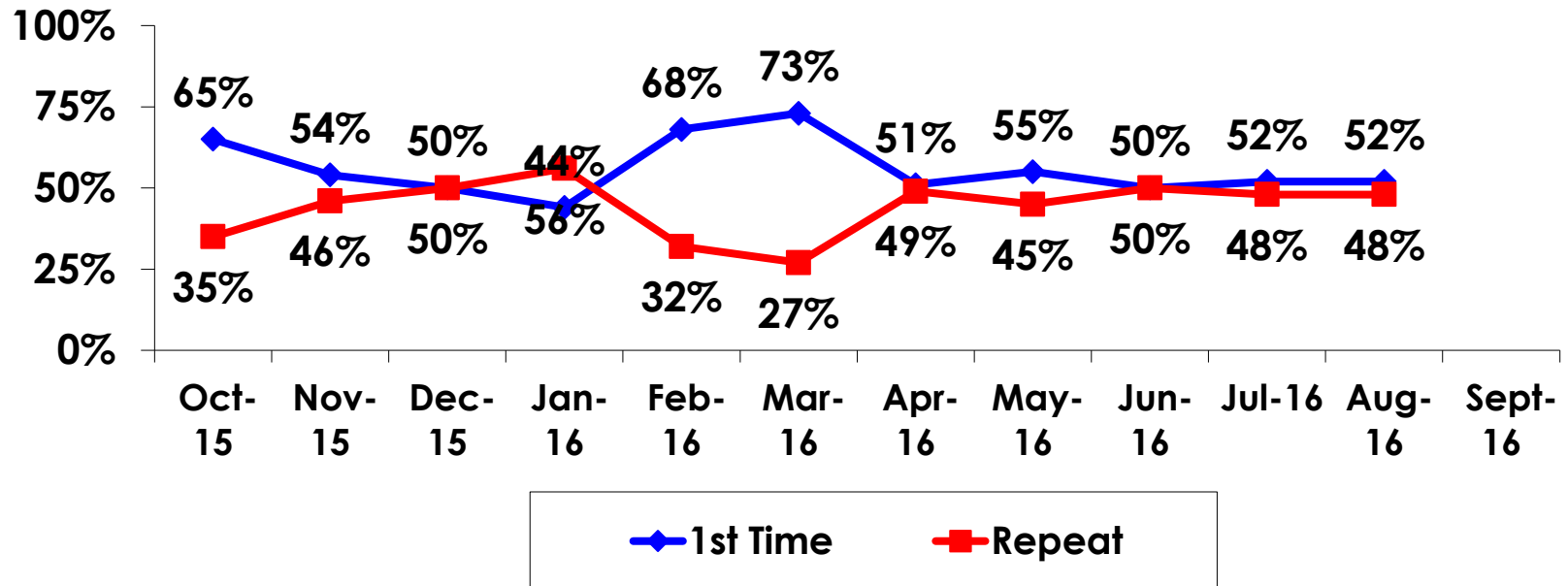
(Of those N=151 respondents, there is a total of 263 children 18 years or younger)



# Prior Trips to Guam



# PRIOR TRIPS TO GUAM



# Trips to Guam by Age & Gender

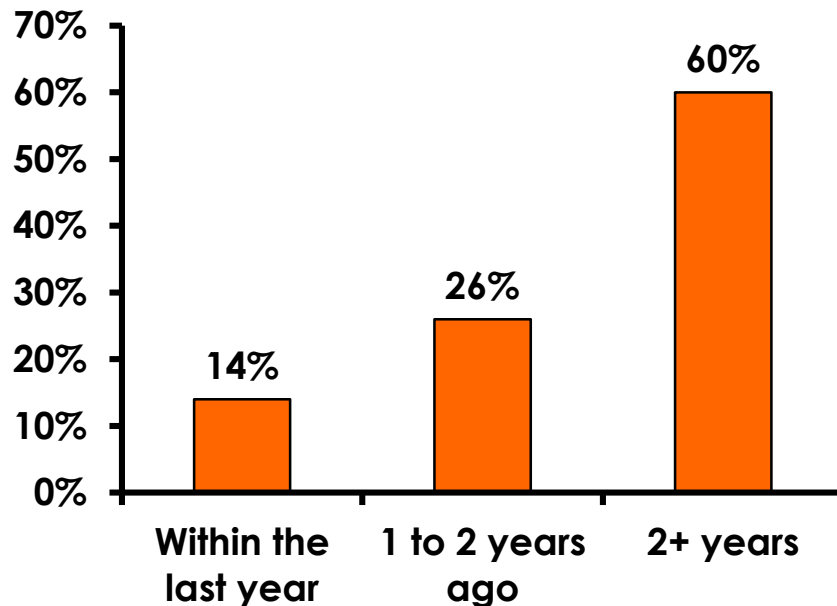
			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	177	94	83	
		Column N %	50%	51%	49%	
	Female	Count	175	90	85	
		Column N %	50%	49%	51%	
	Total	Count	352	184	168	
AGE	18-24	Count	81	60	21	
		Column N %	23%	33%	13%	
	25-34	Count	93	61	32	
		Column N %	26%	33%	19%	
	35-49	Count	153	57	96	
		Column N %	44%	31%	57%	
	50+	Count	24	5	19	
		Column N %	7%	3%	11%	
		Total	Count	351	183	168

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



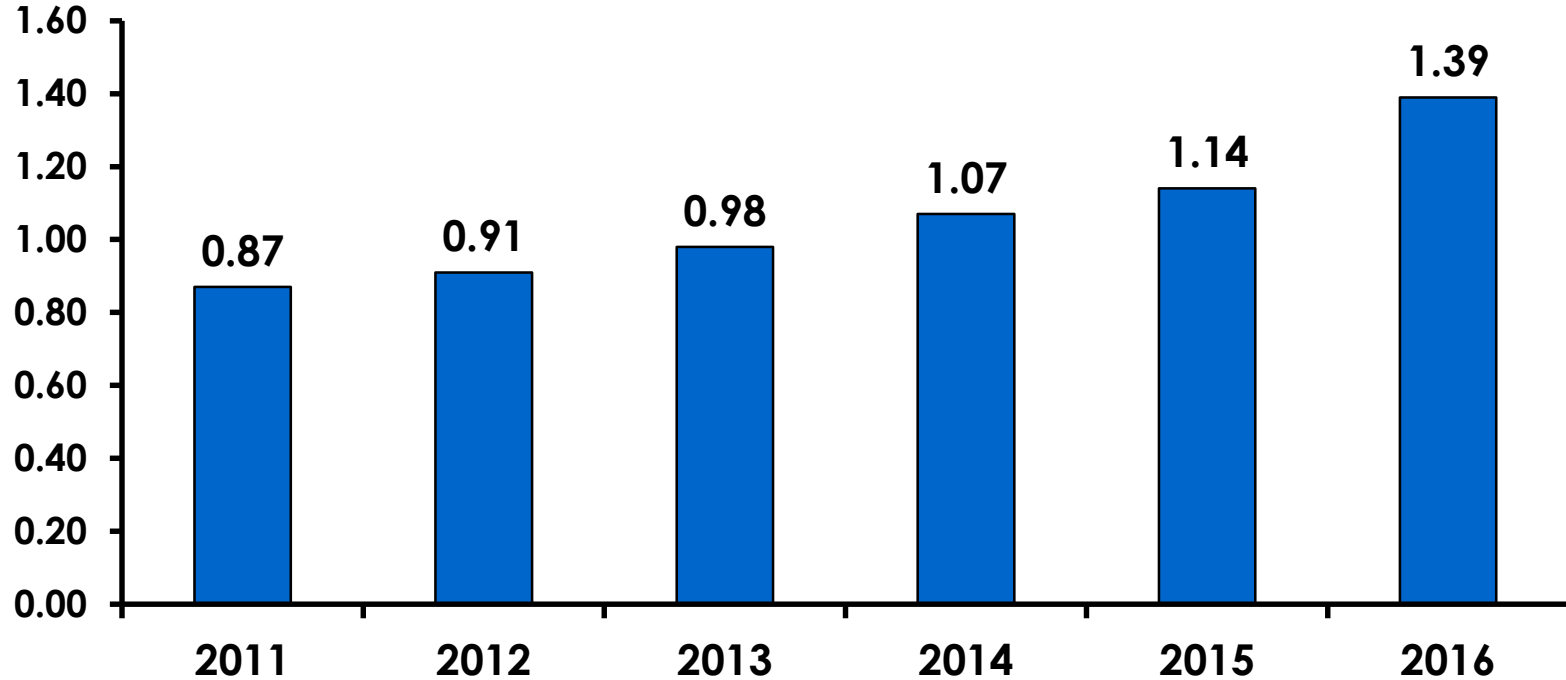
# Repeat Visitors Last Trip

n = 167



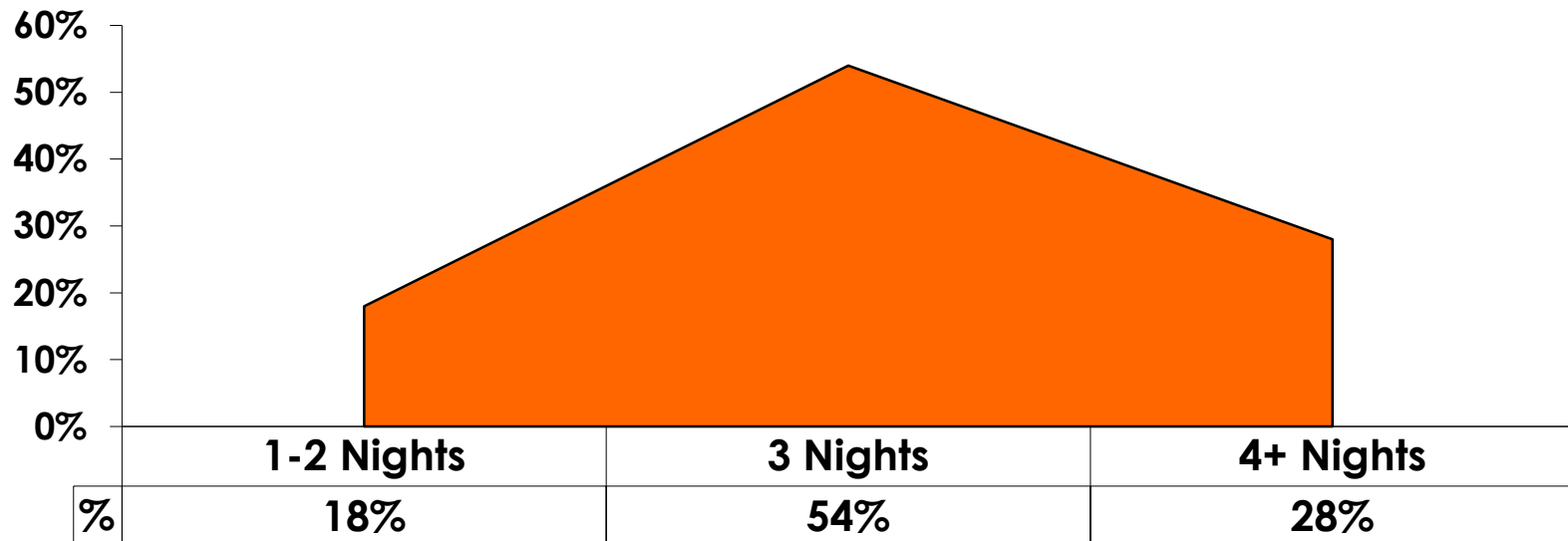
- The average repeat visitor has been to Guam 3.11 times.

# Average Number Overnight Trips (2011-2016) (2 nights or more)

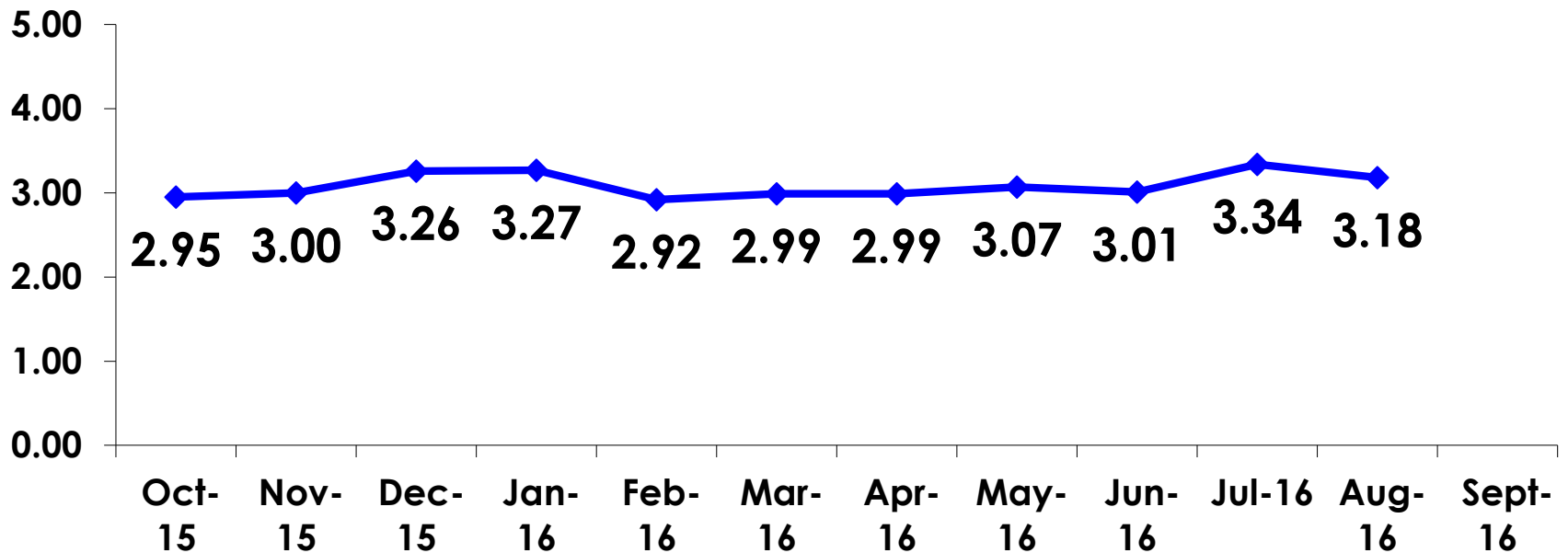


# Length of Stay

Mean = 3.18 Days  
Median = 3.0 Days



# AVG LENGTH OF STAY

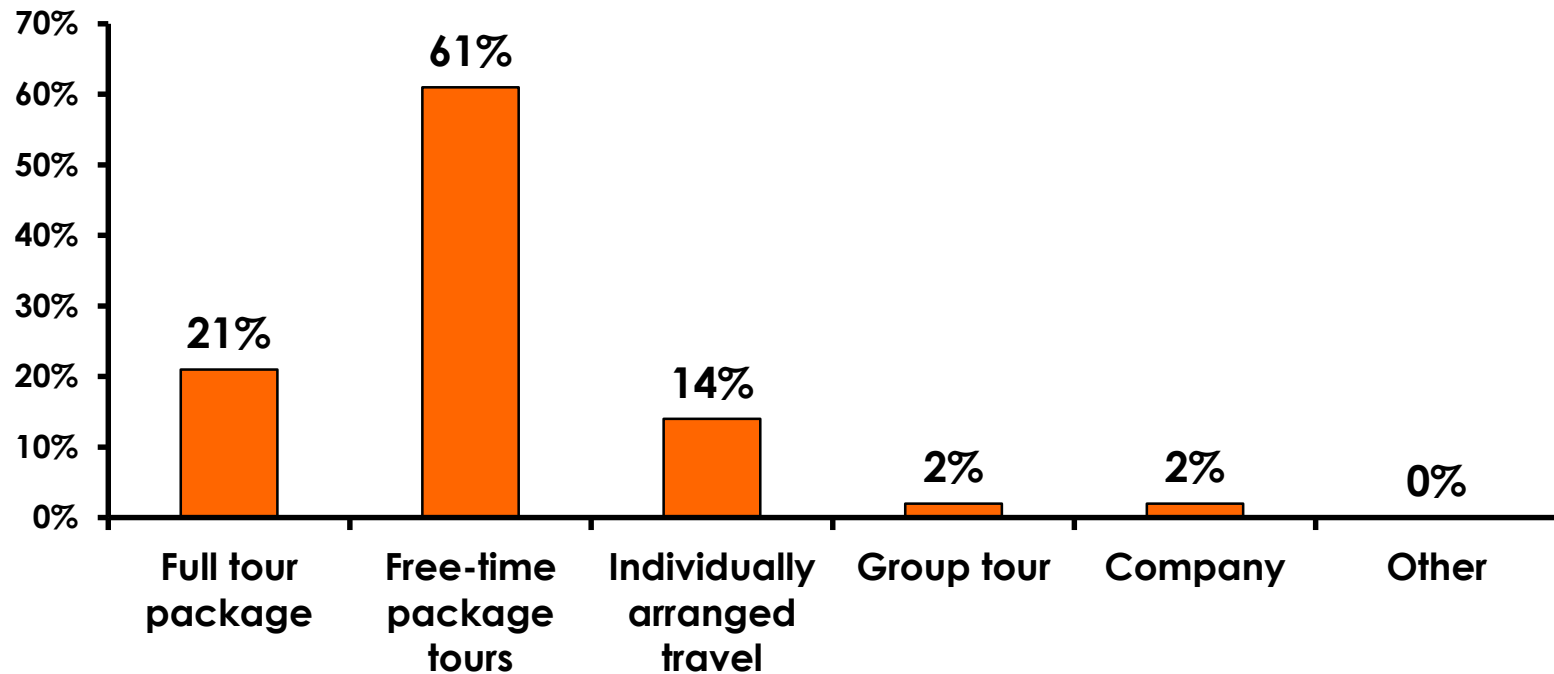


# Occupation by Income

		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	Office worker non-mgr	17%	11%	41%	24%	7%	6%	13%	17%	100%		
	Engineer	14%	33%	15%	24%	26%	18%	13%	7%			
	Student	11%	11%	4%	10%	4%	10%	7%	8%			
	Teacher	10%	22%	15%	14%	7%	18%	9%	6%			
	Homemaker	9%	6%	4%		15%	10%	16%	8%			
	Manager	9%				4%	6%	18%	14%			
	Salesperson	8%		4%	10%	30%	16%	2%	6%			
	Self-employed	7%		4%	5%	4%	6%	5%	13%			
	Professional/ Specialist	4%			14%	4%	2%	2%	7%			
	Govt- office worker non-mgr	2%		4%			2%	4%	2%			
	Executive (30+ employees)	2%		4%				4%	4%			
	Other	2%	11%	4%				2%	2%			
	Skilled worker	2%		4%			2%		2%			
	Govt- Manager	1%					2%	4%	2%			
	Freeter	1%							1%			
	Retired	1%					4%					
	Unemployed	0%	6%									
	Govt- Executive	0%						2%				
	Total	Count	338	18	27	21	27	51	55		99	3

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



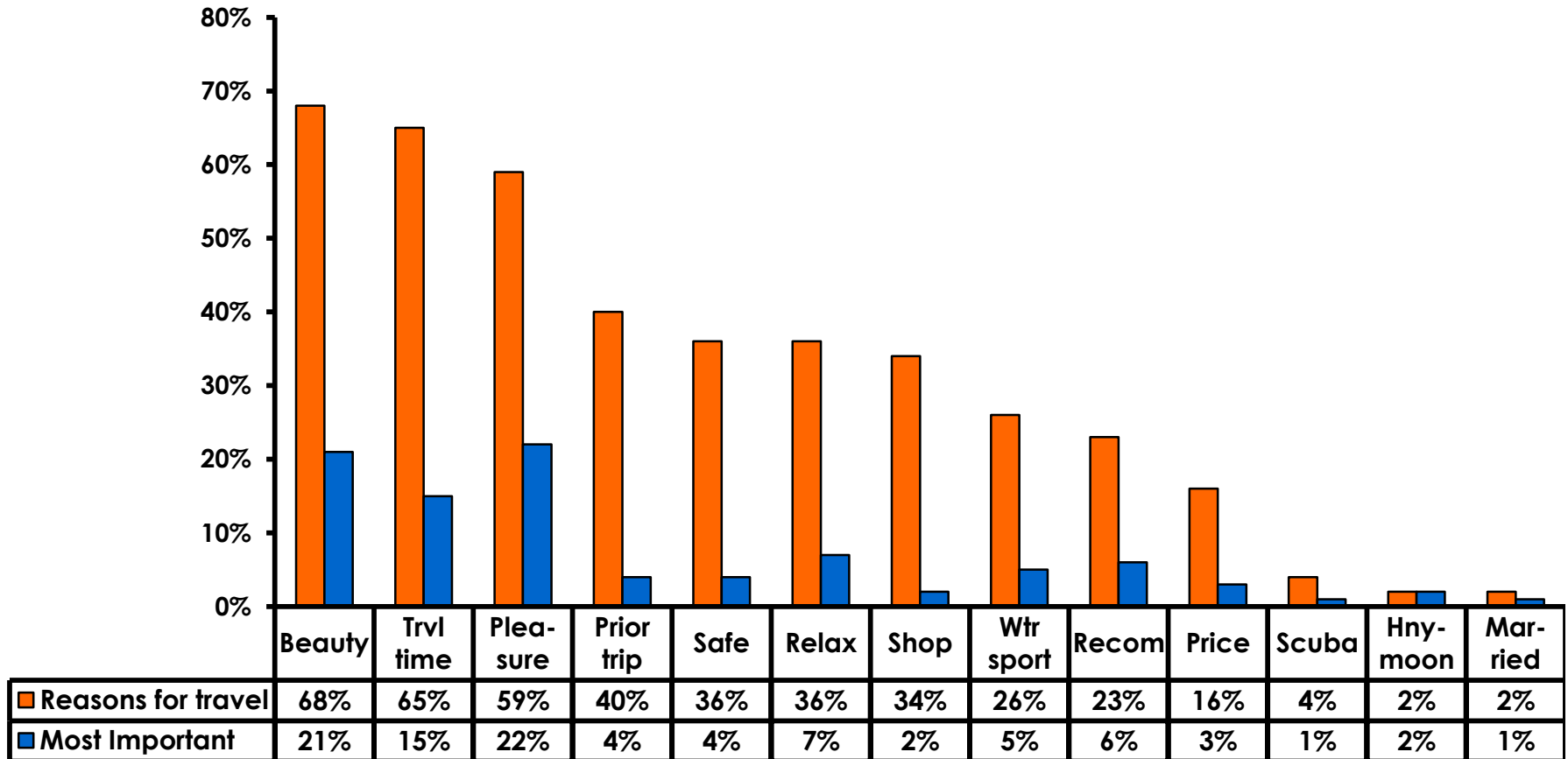
# Accommodation by Income

Average length of stay: 3.18 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	16%	28%	21%	10%	11%	21%	20%	7%	33%	
	Outrigger Guam Resort	11%	11%		5%	7%	12%	7%	17%		
	Guam Reef & Olive Spa	9%		18%	24%	11%	2%	4%	5%	33%	
	Onward Beach Resort	9%		4%	10%	7%	12%	9%	12%		
	Fiesta Resort Guam	8%	11%	11%	19%	15%	4%	9%	6%		
	PIC Club	7%		4%			10%	16%	9%		
	Hotel Nikko Guam	7%	17%	4%			10%	15%	7%		
	Hilton Guam Resort	5%		11%		11%	6%	4%	5%		
	Royal Orchid Guam	5%		11%	10%	15%	4%	4%			
	Westin Resort Guam	4%	6%			15%	4%	4%	5%		
	Grand Plaza Hotel	4%	6%		5%	4%	2%	2%	4%		
	Holiday Resort Guam	4%	11%	4%	5%	4%	2%	2%	4%	33%	
	Hyatt Regency Guam	3%		7%	5%		4%	4%	3%		
	Leo Palace Resort	2%			5%		4%		4%		
	Sheraton Laguna Guam	2%		7%			6%		1%		
	Aqua Suites	1%	11%		5%				1%		
	Dusit Thani Guam	1%							2%		
	Pacific Star Resort & Spa	1%							2%		
	Days Inn (Tamuning)	0%							1%		
	Other	0%							1%		
	Pacific Bay Hotel	0%							1%		
	Oceanview Hotel	0%							1%		
	Bayview Hotel	0%							1%		
	Lotte Hotel Guam	0%						2%			
	Total	Count	352	18	28	21	27	52	55	99	3



# Travel Motivation - Top Responses



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# Most Important Reason for Choosing Guam

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

were the primary reasons for visiting during this period.

# Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty	68%	70%	64%	72%	54%	65%	71%	
	Short travel time	65%	49%	59%	76%	67%	66%	64%	
	Pleasure	59%	57%	62%	62%	38%	47%	71%	
	Previous trip	40%	16%	28%	59%	50%	39%	41%	
	Safe	36%	17%	33%	46%	46%	34%	38%	
	Relax	36%	27%	41%	38%	33%	33%	39%	
	Shopping	34%	43%	34%	28%	33%	26%	42%	
	Water sports	26%	20%	18%	32%	33%	24%	27%	
	Recomm- friend/family/trvl agnt	23%	33%	32%	14%	17%	21%	25%	
	Price	16%	14%	16%	17%	17%	20%	13%	
	Other	4%	4%	1%	5%	17%	5%	3%	
	Scuba	4%	5%	8%	1%	4%	3%	5%	
	Honeymoon	2%	1%	7%	1%		4%	1%	
	Married/ Attn wedding	2%	4%	1%		8%	2%	1%	
	Company/ Business Trip	2%		2%	3%		1%	2%	
	Golf	1%			3%	4%	1%	2%	
	Organized sports	1%			2%		1%	1%	
	Company Sponsored	1%			2%		2%		
	Visit friends/ Relatives	1%	1%			4%		1%	
	Total	Count	349	81	92	151	24	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	68%	83%	59%	71%	70%	63%	80%	64%	100%	
	Short travel time	65%	72%	56%	48%	59%	67%	74%	72%	100%	
	Pleasure	59%	56%	67%	67%	56%	62%	54%	54%	100%	
	Previous trip	40%	33%	19%	43%	26%	50%	54%	48%		
	Safe	36%	28%	26%	33%	19%	44%	44%	38%	67%	
	Relax	36%	22%	41%	38%	41%	27%	41%	42%		
	Shopping	34%	44%	37%	48%	33%	31%	26%	31%	100%	
	Water sports	26%	33%	41%	19%	22%	23%	30%	27%	33%	
	Recomm- friend/family/trvl agnt	23%	28%	41%	29%	26%	25%	9%	19%	33%	
	Price	16%	33%	7%	14%	7%	21%	24%	14%	33%	
	Other	4%		4%	5%		6%	7%	6%		
	Scuba	4%	6%	4%	14%	7%	2%		5%		
	Honeymoon	2%			5%		10%		1%		
	Married/ Attn wedding	2%		4%			2%	4%	2%		
	Company/ Business Trip	2%		4%		4%	4%		2%		
	Golf	1%			5%	4%	2%		2%		
	Organized sports	1%					4%	2%			
	Company Sponsored	1%				4%	2%		1%		
	Visit friends/ Relatives	1%					2%		1%		
	Total	Count	349	18	27	21	27	52	54	99	3

# SECTION 3 **EXPENDITURES**

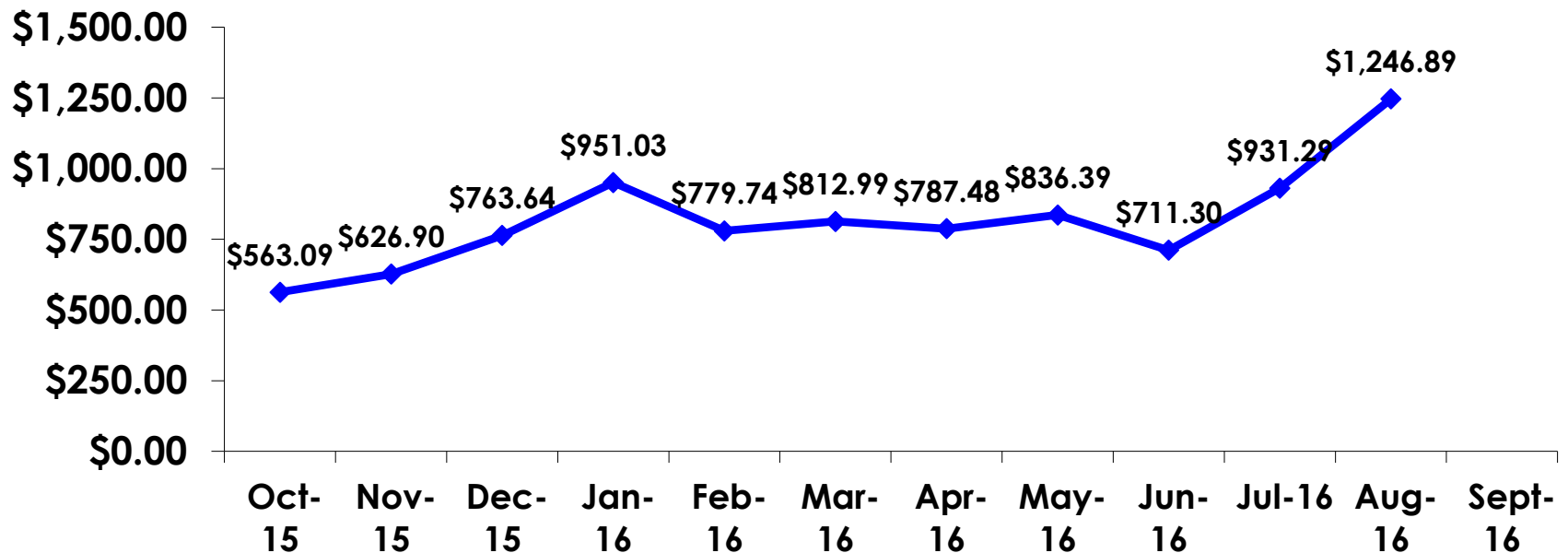
# Prepaid Expenditures

¥101.12/US\$1

- \$3,181.78 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$16,812 = maximum (highest amount recorded for the entire sample)
- \$1,246.89 = overall mean average per person prepaid expenditures

# PREPAID EXPENDITURES

## Per Person



YTD=\$819.20

# Breakdown of Prepaid Expenditures

¥101.12=\$1

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

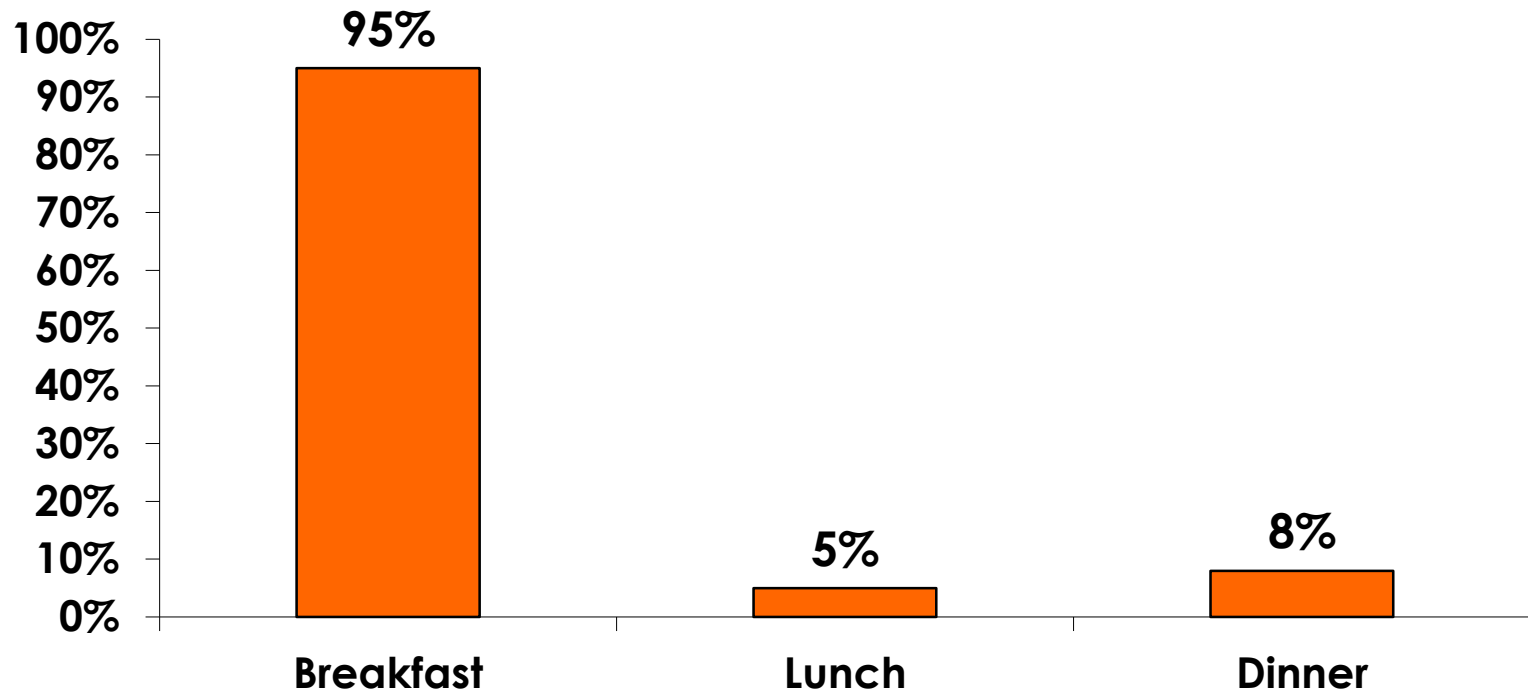
	MEAN \$
Air & Accommodation package only	\$3,105.07
Air & Accommodation w/ daily meal package	\$5,483.58
Air only	\$2,449.06
Accommodation only	\$1,200.63
Accommodation w/ daily meal only	\$1,137.26
Food & Beverages in Hotel	\$-
Ground transportation – Japan	\$111.03
Ground transportation – Guam	\$148.34
Optional tours/ activities	\$451.77
Other expenses	\$950.99
<b>Total Prepaid</b>	<b>\$3,181.78</b>



# PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=38

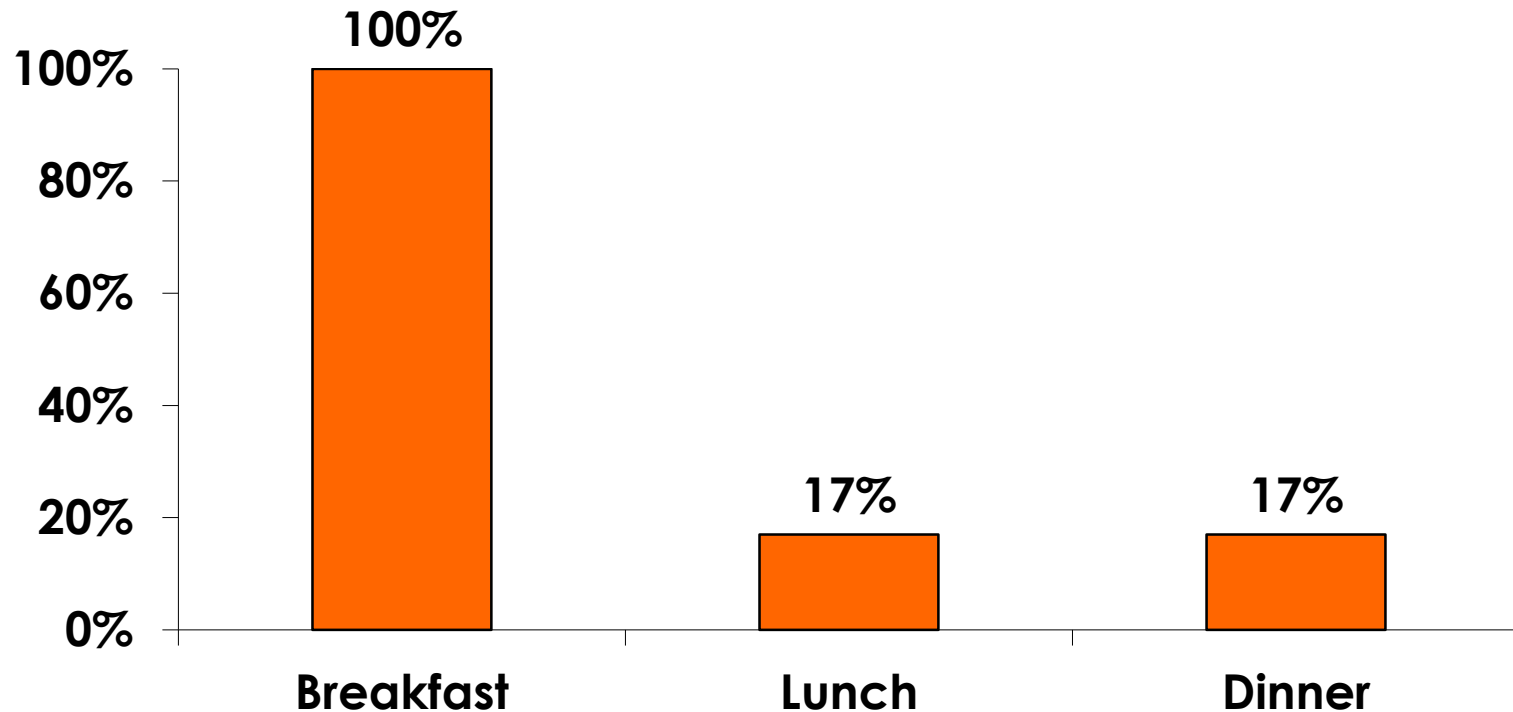


Mean=\$5,483.58 per travel party

# PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

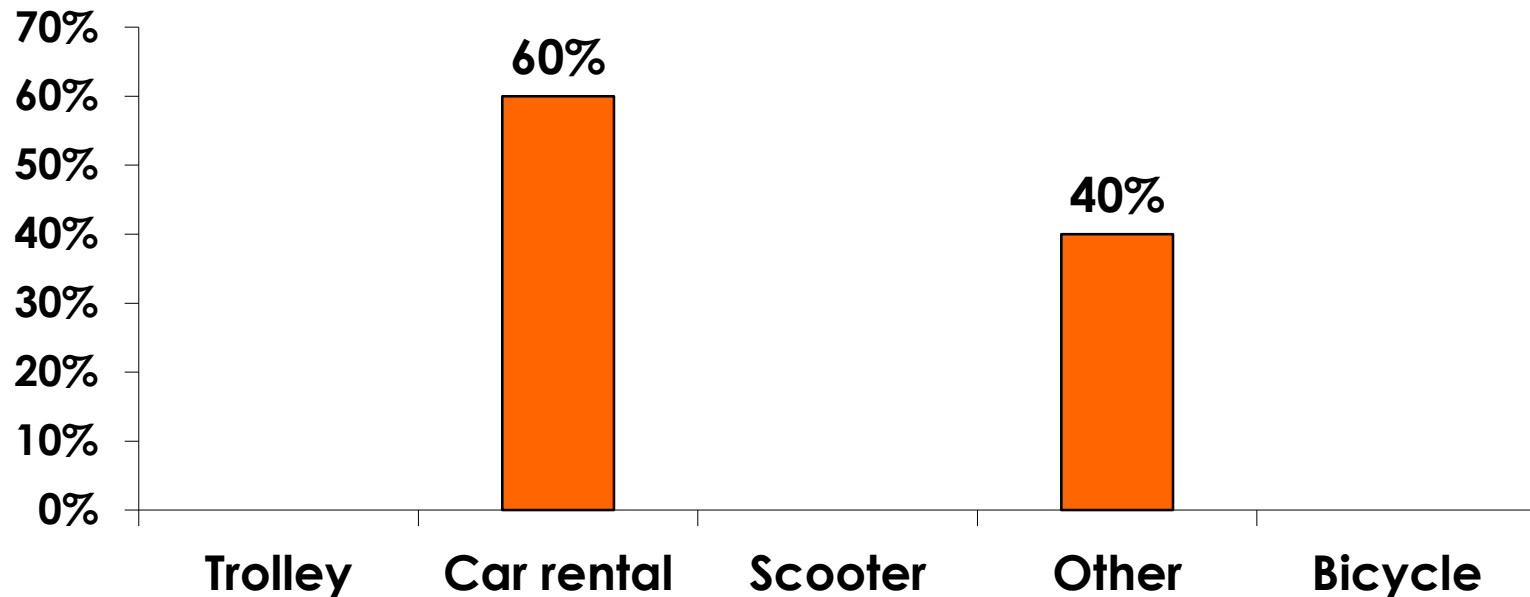
n=6



Mean=\$1,137.26 per travel party

# PREPAID GROUND TRANSPORTATION

n=5



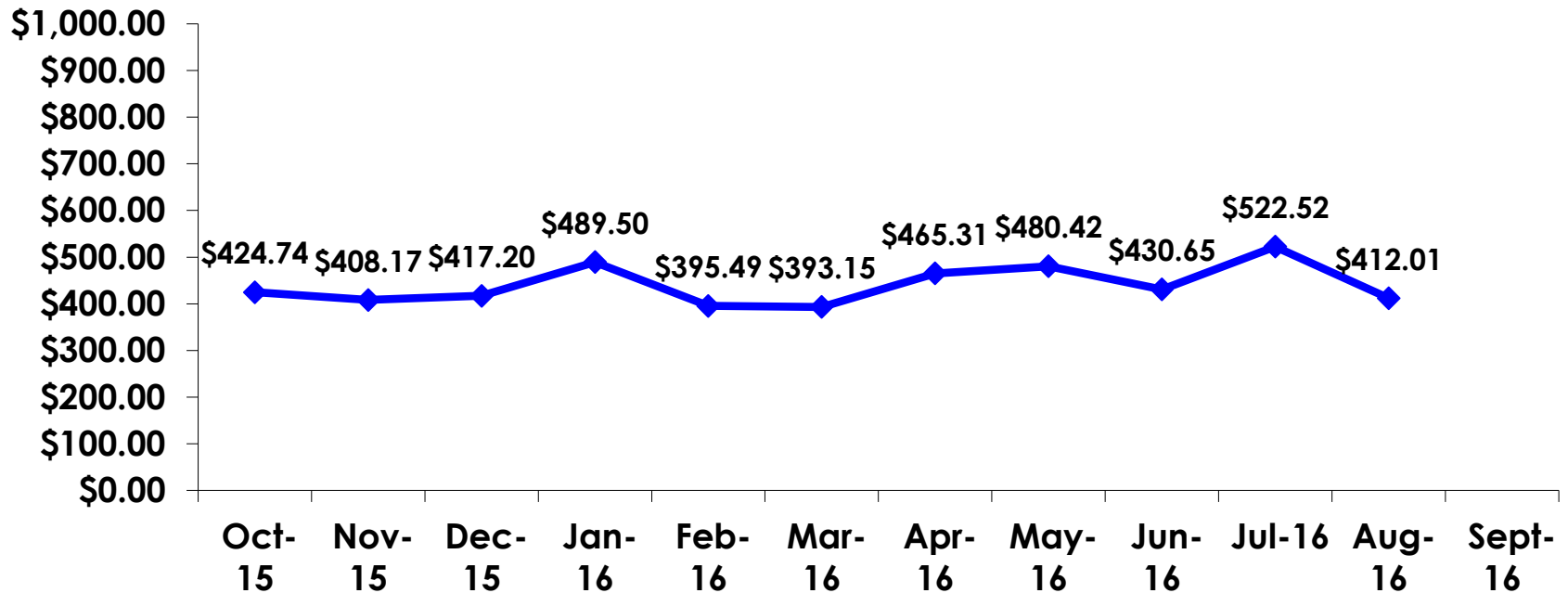
Mean=\$148.34 per travel party

# On-Island Expenditures

- \$907.46 = 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)
- \$412.01 = overall mean average per person on-island expenditure

# ON-ISLAND EXPENDITURES

## Per Person

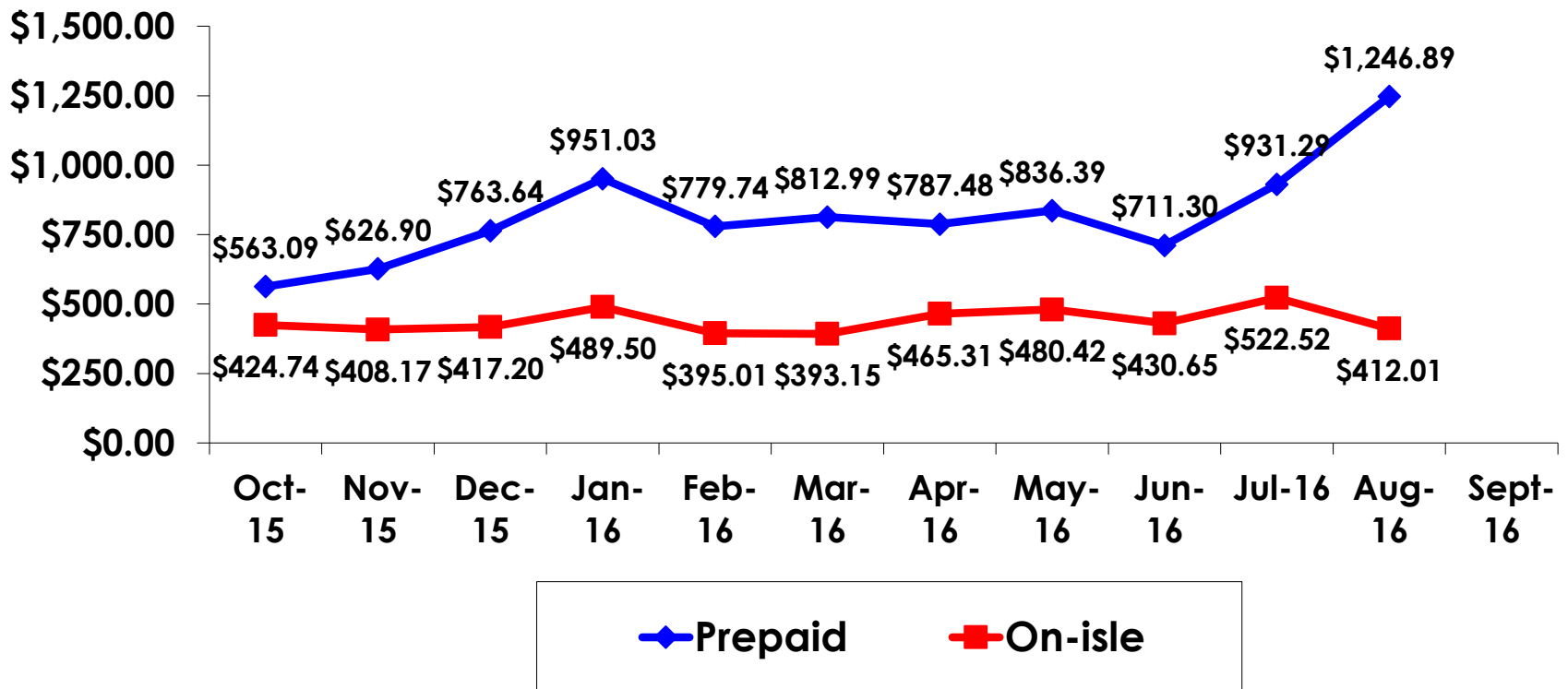


YTD = \$439.80

# PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$819.20

On-Isle YTD = \$439.80



# Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
			-	Male	Female	Male				Female		
		AGE				AGE						
		18-24				25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$412.01	\$388.99	\$435.29	\$522.62	\$393.74	\$327.82	\$478.78	\$386.98	\$482.78	\$399.43	\$591.14
	Median	\$323	\$300	\$380	\$390	\$300	\$250	\$375	\$360	\$403	\$300	\$540
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$13
	Maximum	\$3,500	\$3,500	\$2,085	\$3,500	\$1,750	\$2,000	\$1,650	\$953	\$2,085	\$1,727	\$1,650

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$71.47	\$80.30	\$62.54	\$26.05	\$27.42	\$126.40	\$48.25
	Median	\$0	\$0	\$0	\$0	\$0	\$11	\$0
F&B FF/STORE	Mean	\$44.17	\$53.38	\$34.86	\$26.23	\$34.49	\$60.52	\$39.79
	Median	\$2	\$20	\$0	\$0	\$0	\$20	\$0
F&B RESTRNT	Mean	\$128.15	\$146.95	\$109.14	\$65.44	\$69.26	\$199.23	\$120.21
	Median	\$30	\$80	\$0	\$0	\$20	\$100	\$0
OPT TOUR	Mean	\$98.10	\$114.33	\$81.68	\$64.44	\$78.81	\$116.41	\$173.75
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$222.99	\$231.67	\$214.21	\$80.56	\$168.09	\$305.13	\$402.08
	Median	\$20	\$30	\$20	\$0	\$0	\$50	\$50
GIFT- OTHER	Mean	\$120.78	\$124.38	\$117.13	\$81.23	\$114.85	\$144.13	\$125.00
	Median	\$70	\$50	\$80	\$0	\$80	\$100	\$50
TRANS	Mean	\$26.54	\$32.80	\$20.21	\$23.99	\$15.91	\$33.91	\$28.46
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$196.64	\$214.27	\$178.81	\$181.04	\$135.89	\$226.20	\$285.58
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$907.46	\$995.36	\$818.57	\$549.23	\$644.72	\$1,208.66	\$1,223.13
	Median	\$600	\$760	\$500	\$400	\$500	\$900	\$905



# On-Island Expenditures

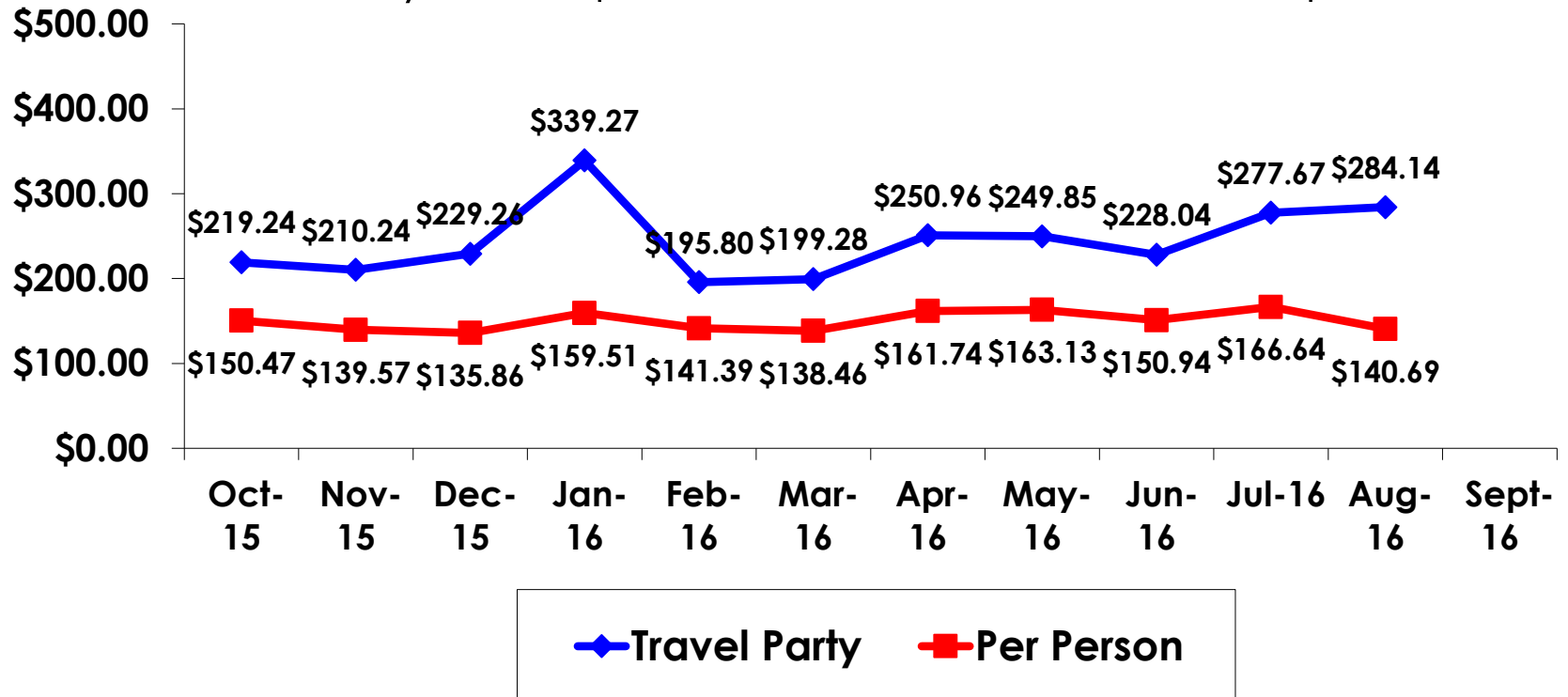
## First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$71.47	\$53.91	\$90.70
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$44.17	\$47.78	\$40.21
	Median	\$2	\$2	\$2
F&B RESTRNT	Mean	\$128.15	\$98.08	\$161.08
	Median	\$30	\$15	\$61
OPT TOUR	Mean	\$98.10	\$97.95	\$98.26
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$222.99	\$170.58	\$280.39
	Median	\$20	\$0	\$50
GIFT- OTHER	Mean	\$120.78	\$116.02	\$125.98
	Median	\$70	\$50	\$76
TRANS	Mean	\$26.54	\$25.16	\$28.05
	Median	\$0	\$0	\$0
OTHER	Mean	\$196.64	\$127.21	\$272.68
	Median	\$0	\$0	\$0
TOTAL	Mean	\$907.46	\$736.26	\$1,094.97
	Median	\$600	\$500	\$748

# ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$243.92

Per Person YTD = \$149.79

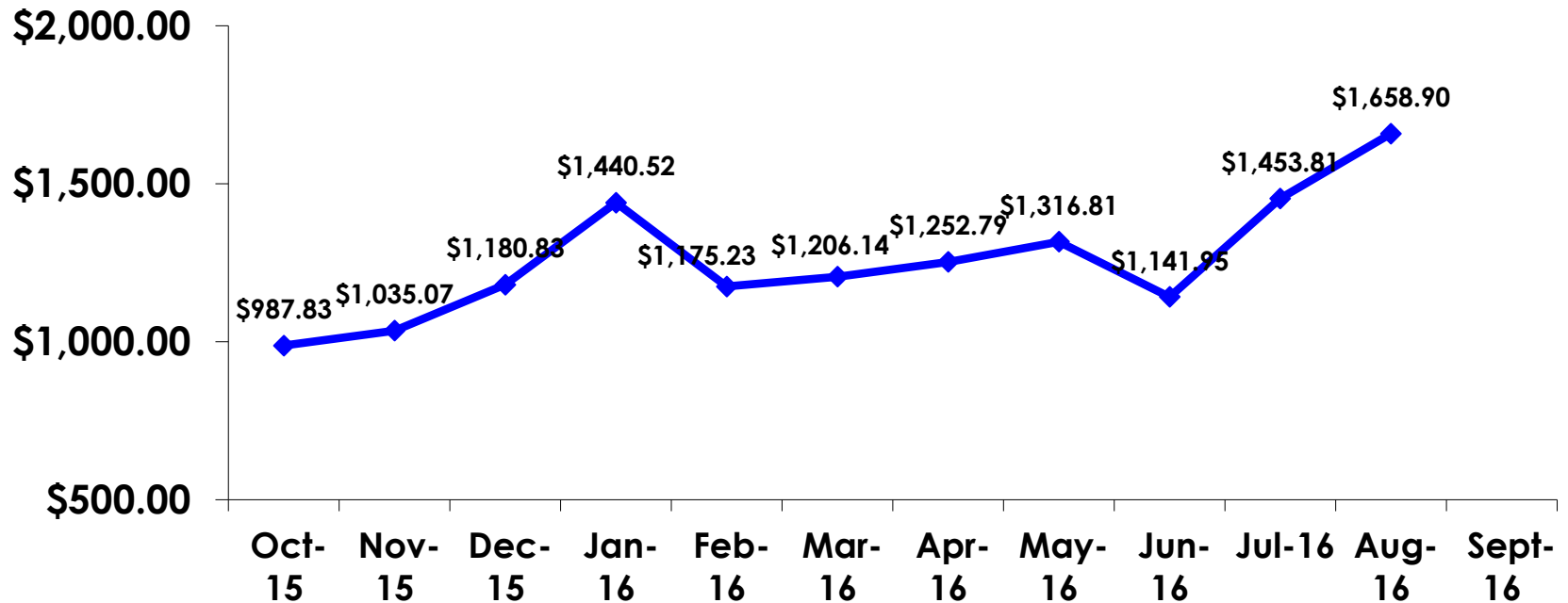


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# Total Expenditures Per Person (Prepaid & On-Island)

- \$1,658.90 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$9,700 = Maximum (highest amount recorded for the entire sample)

# TOTAL EXPENDITURES Per Person



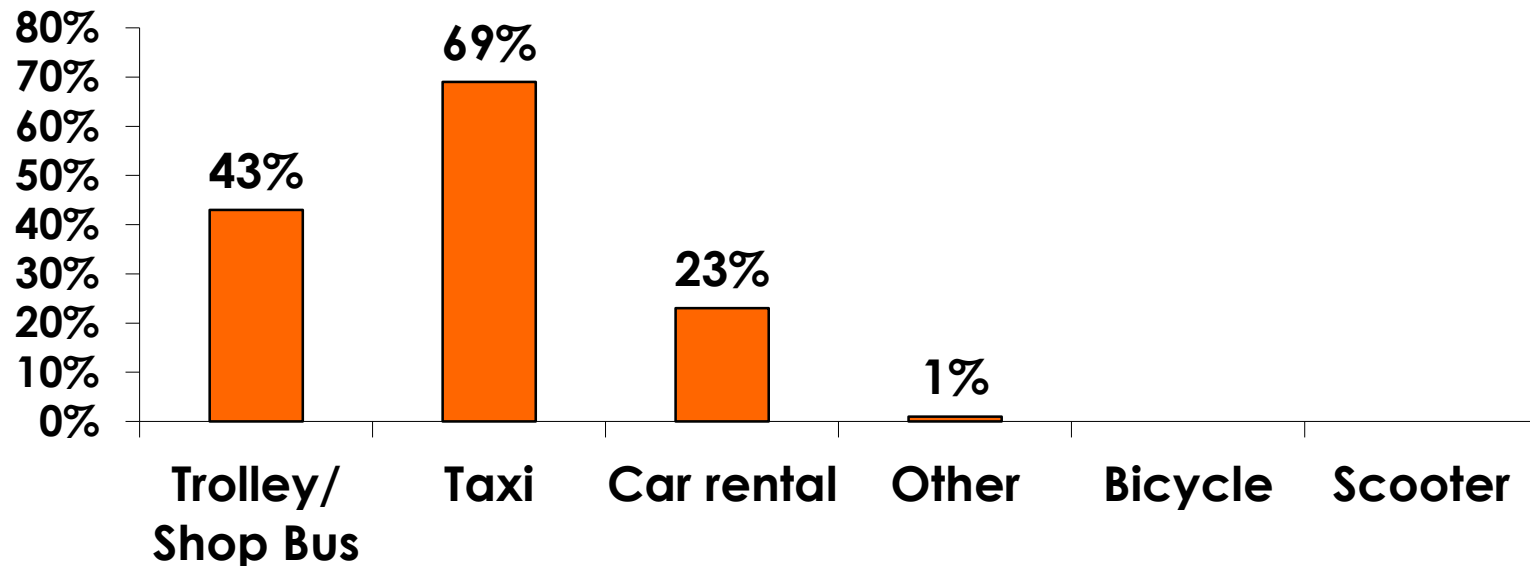
YTD=\$1,259.00

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$71.47
Food & beverage in fast food restaurant/convenience store	\$44.17
Food & beverage at restaurants or drinking establishments outside a hotel	\$128.15
Optional tours and activities	\$98.10
Gifts/ souvenirs for yourself/companions	\$222.99
Gifts/ souvenirs for friends/family at home	\$120.78
Local transportation	\$26.54
Other expenses not covered	\$196.64
<b>Average Total</b>	<b>\$907.46</b>

# Local Transportation

n=93



**Mean=\$26.54 per travel party**

# Guam Airport Expenditures

- \$60.87 = Mean
- \$12 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,580 = Maximum (highest amount recorded for the entire sample)

# Breakdown of Airport Expenditures

	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	\$15.78
<b>Gifts/Souvenirs Self</b>	\$22.36
<b>Gifts/Souvenirs Others</b>	\$22.79
<b>Total</b>	<b>\$60.87</b>

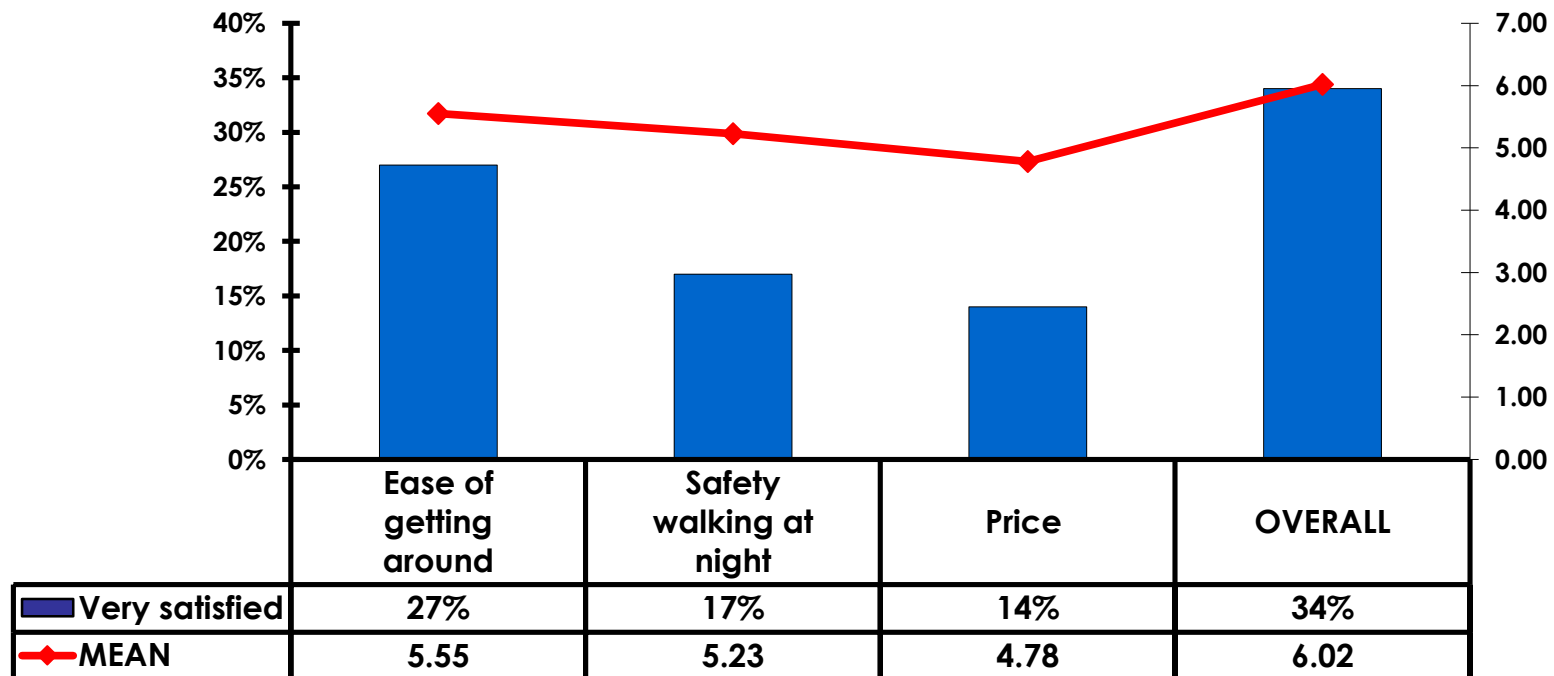


# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

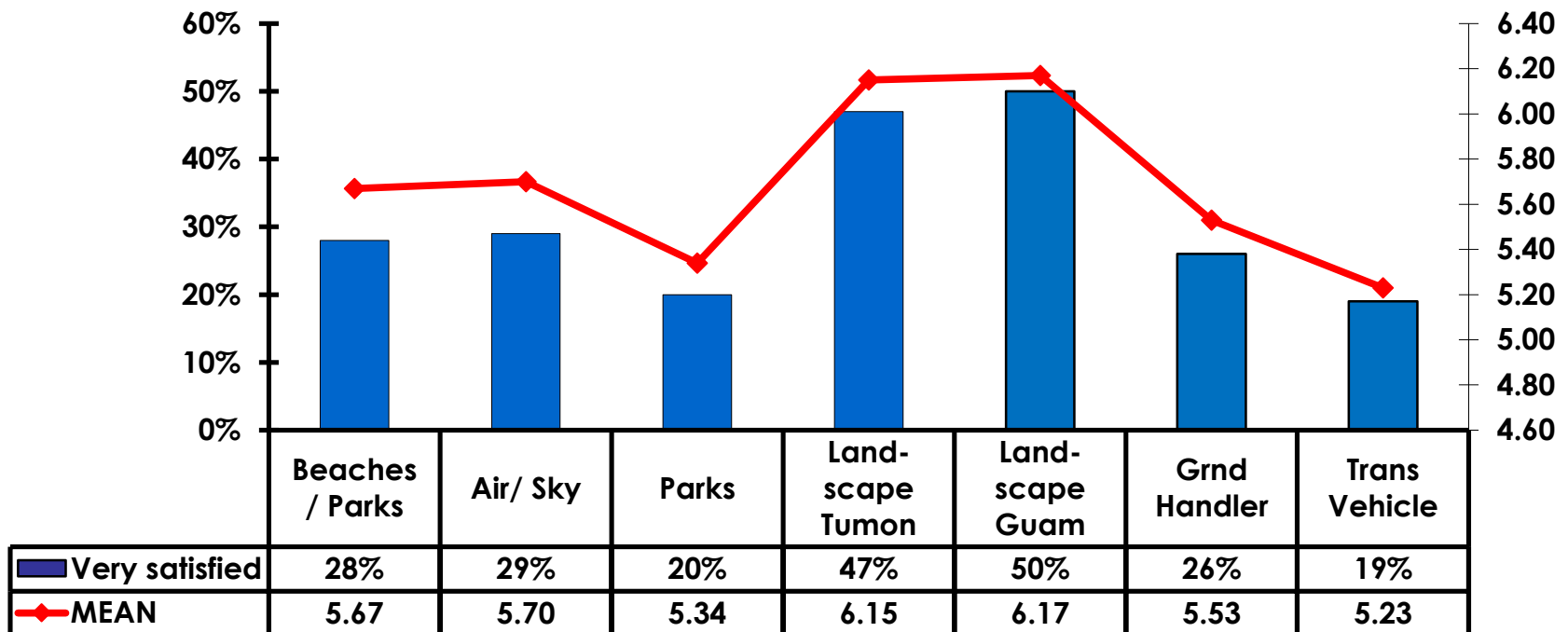
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

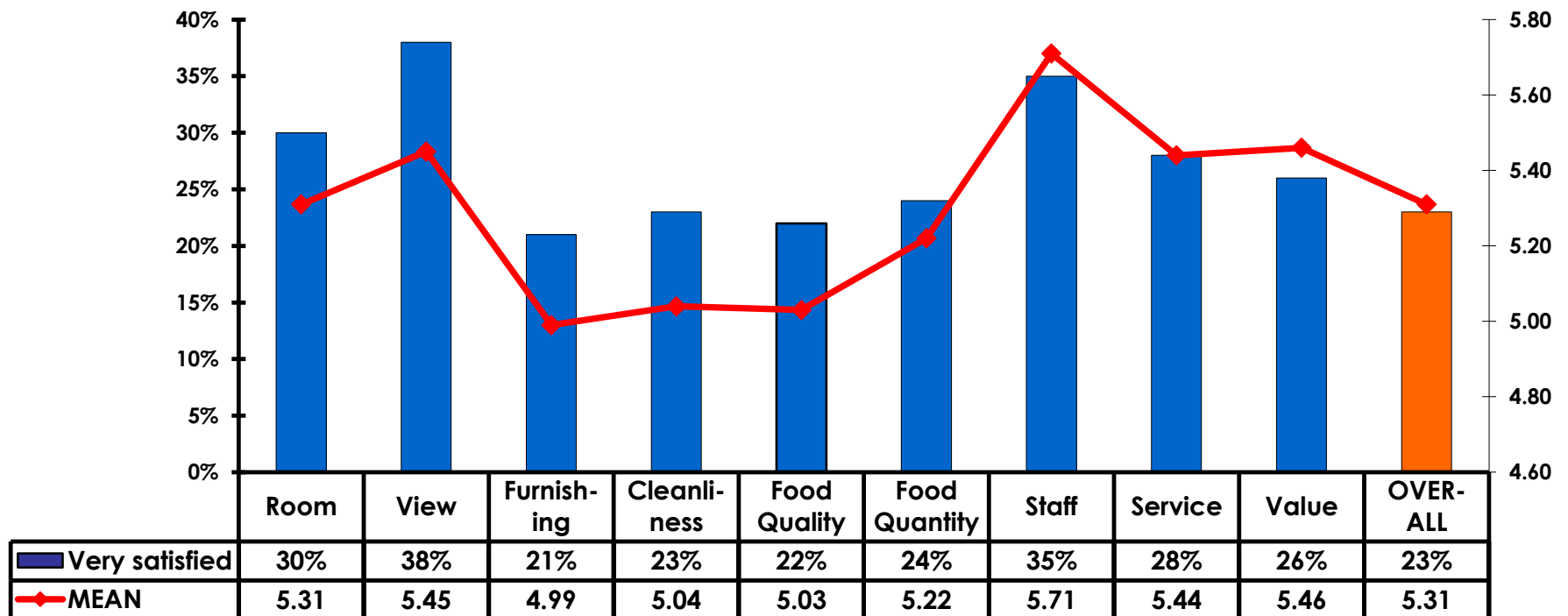
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

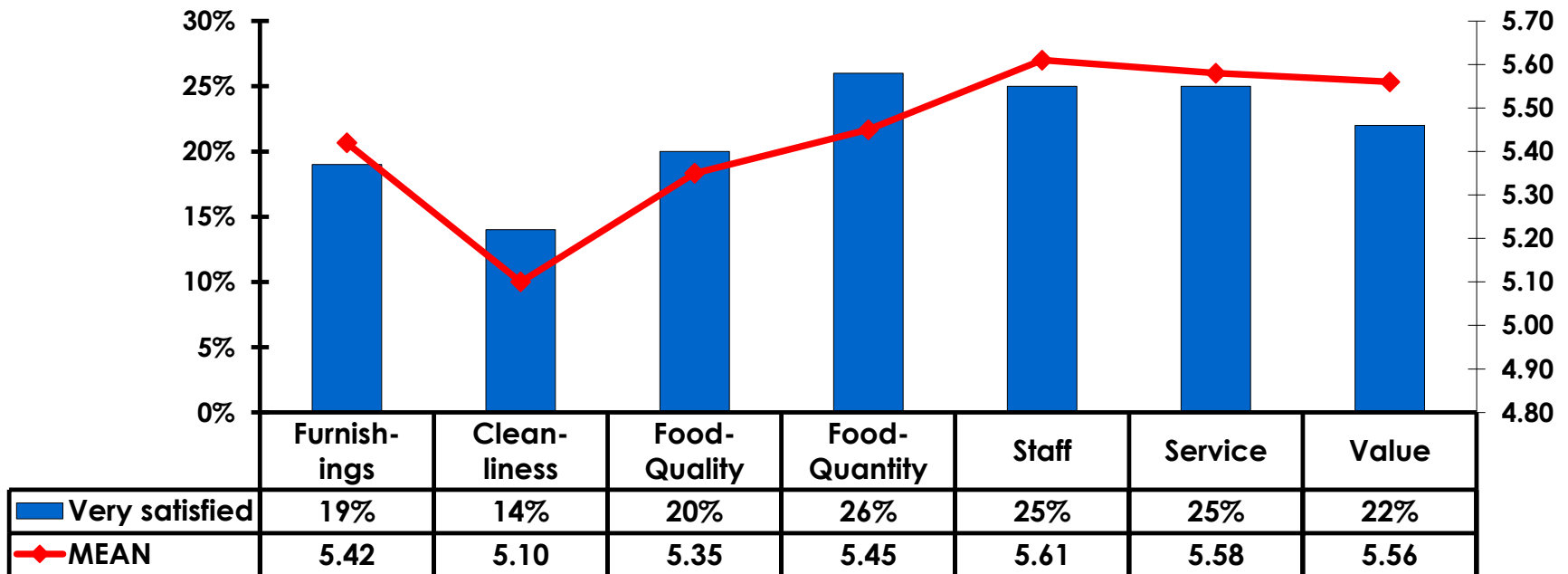
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

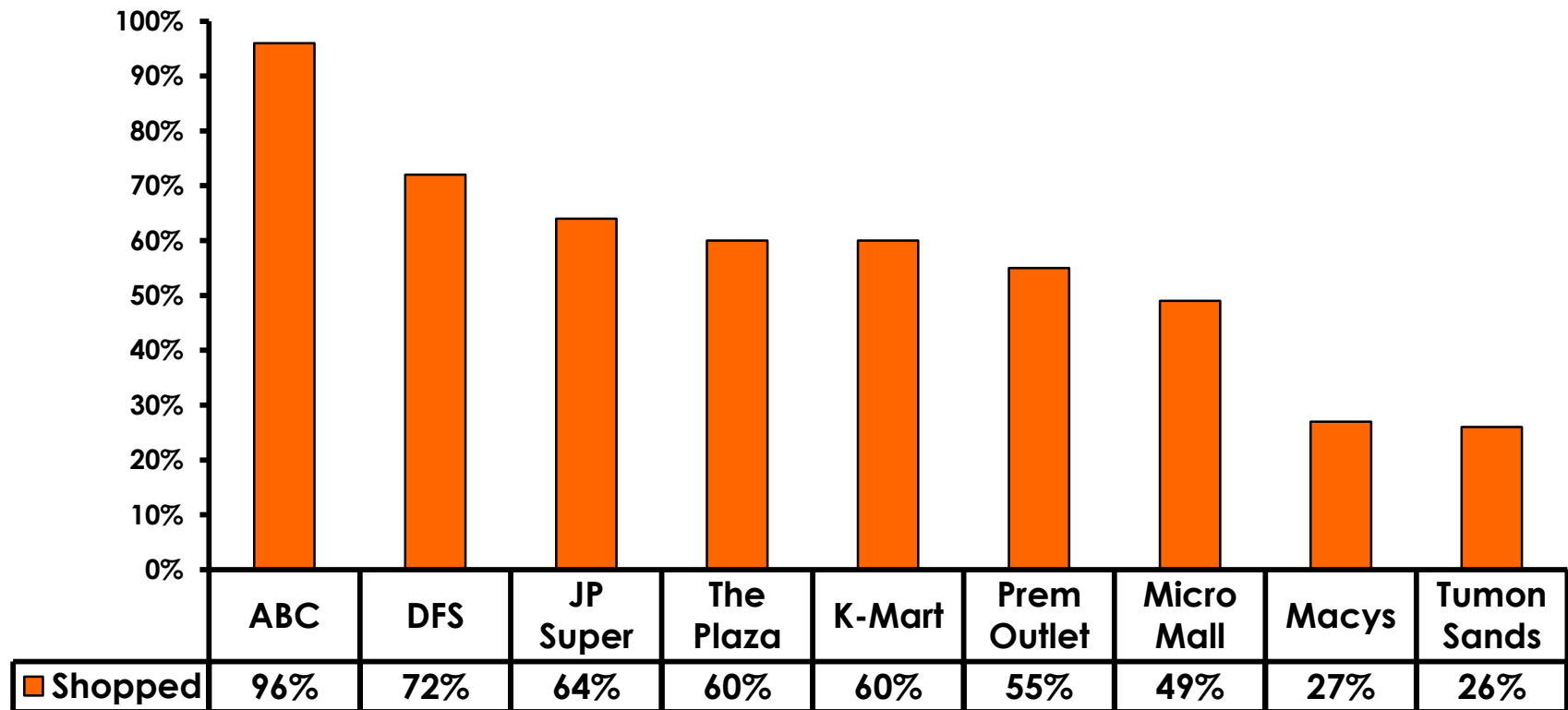
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

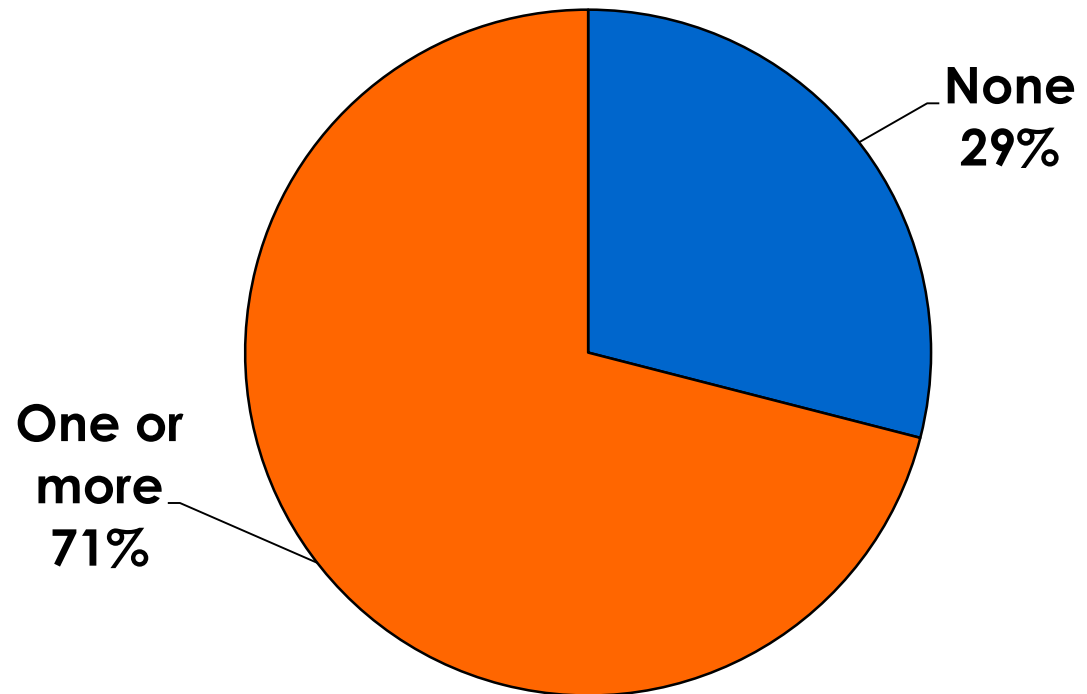
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>63%</b>	Score of 6 to 7 = <b>59%</b>
Score of 4 to 5 = <b>34%</b>	Score of 4 to 5 = <b>38%</b>
Score 1 to 3 = <b>3%</b>	Score 1 to 3 = <b>3%</b>
<b>MEAN = 5.66</b>	<b>MEAN = 5.60</b>

# Optional Tour Participation

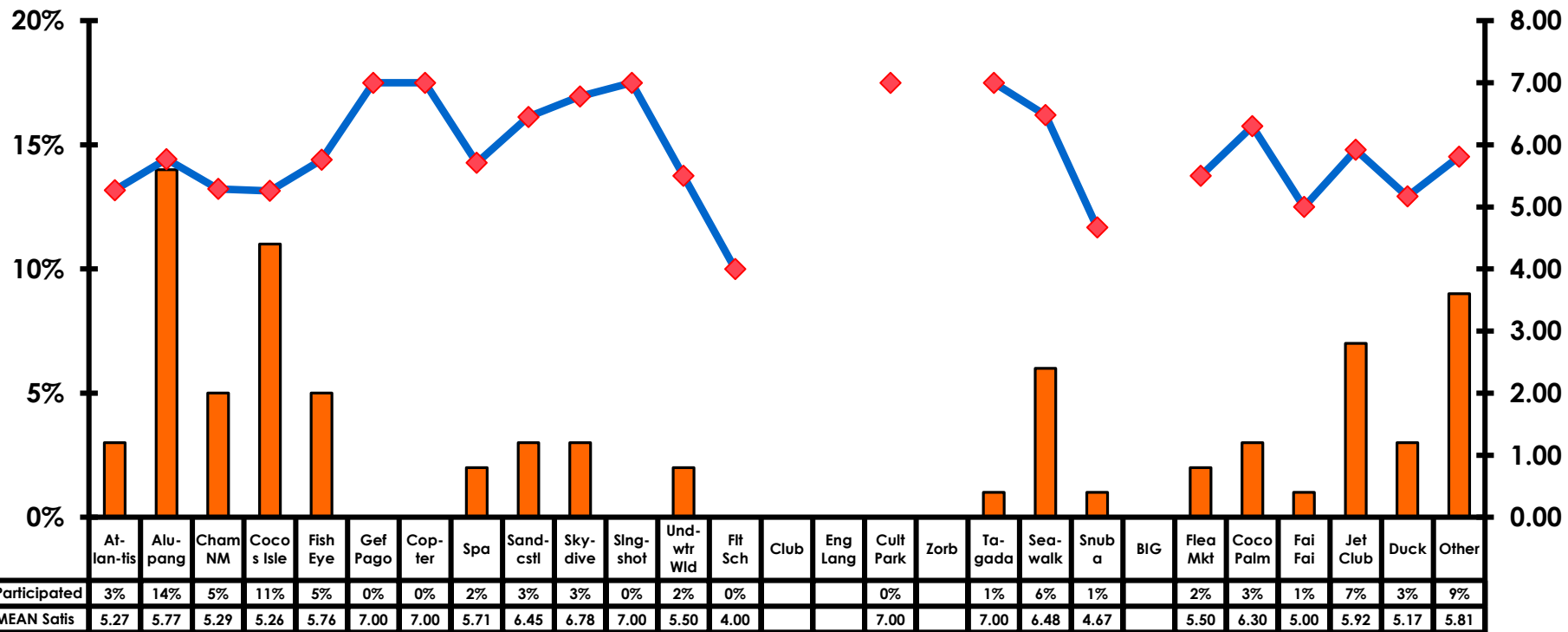
- Average number of tours participated in is 1.21





# 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 = <b>59%</b>	Score of 6 to 7 = <b>58%</b>
Score of 4 to 5 = <b>37%</b>	Score of 4 to 5 = <b>41%</b>
Score 1 to 3 = <b>3%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 5.55</b>	<b>MEAN = 5.51</b>

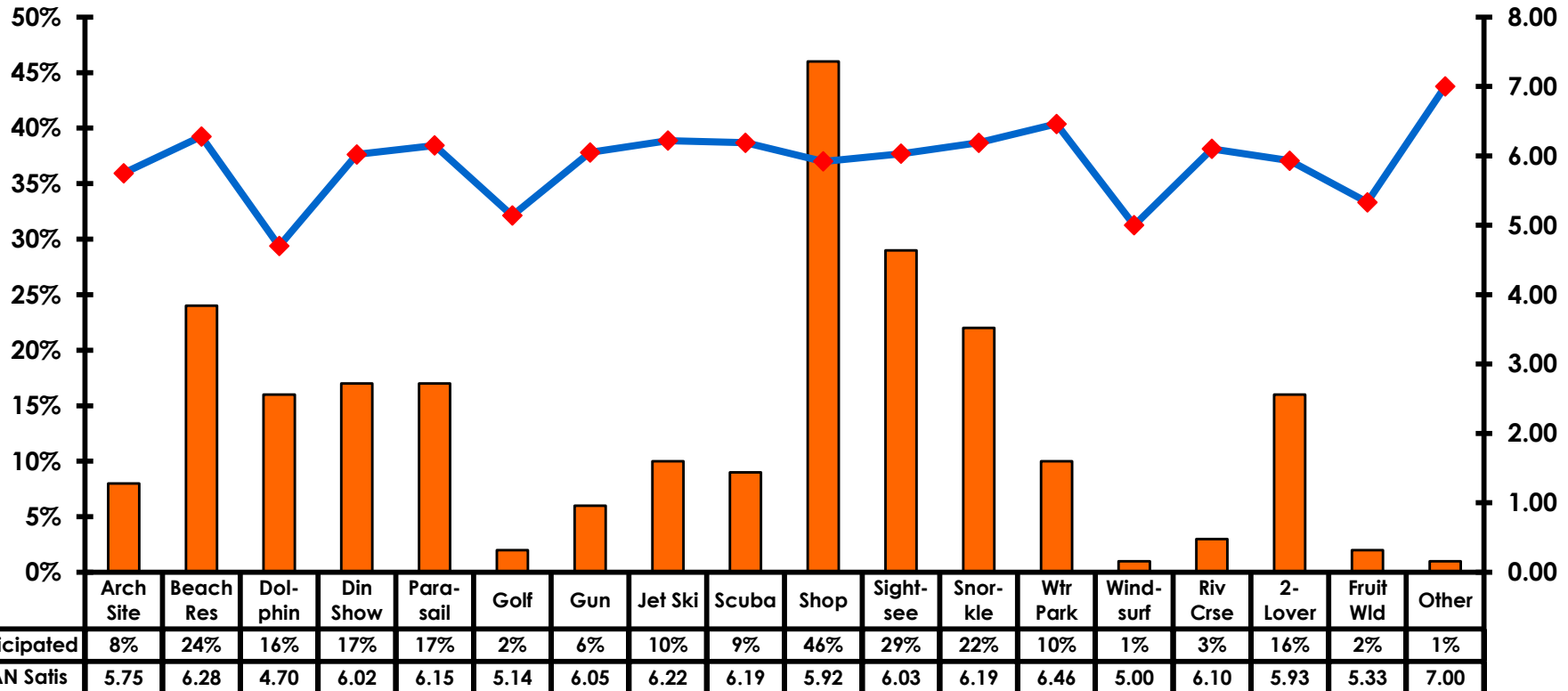
# Night Tours Satisfaction

7pt Rating Scale

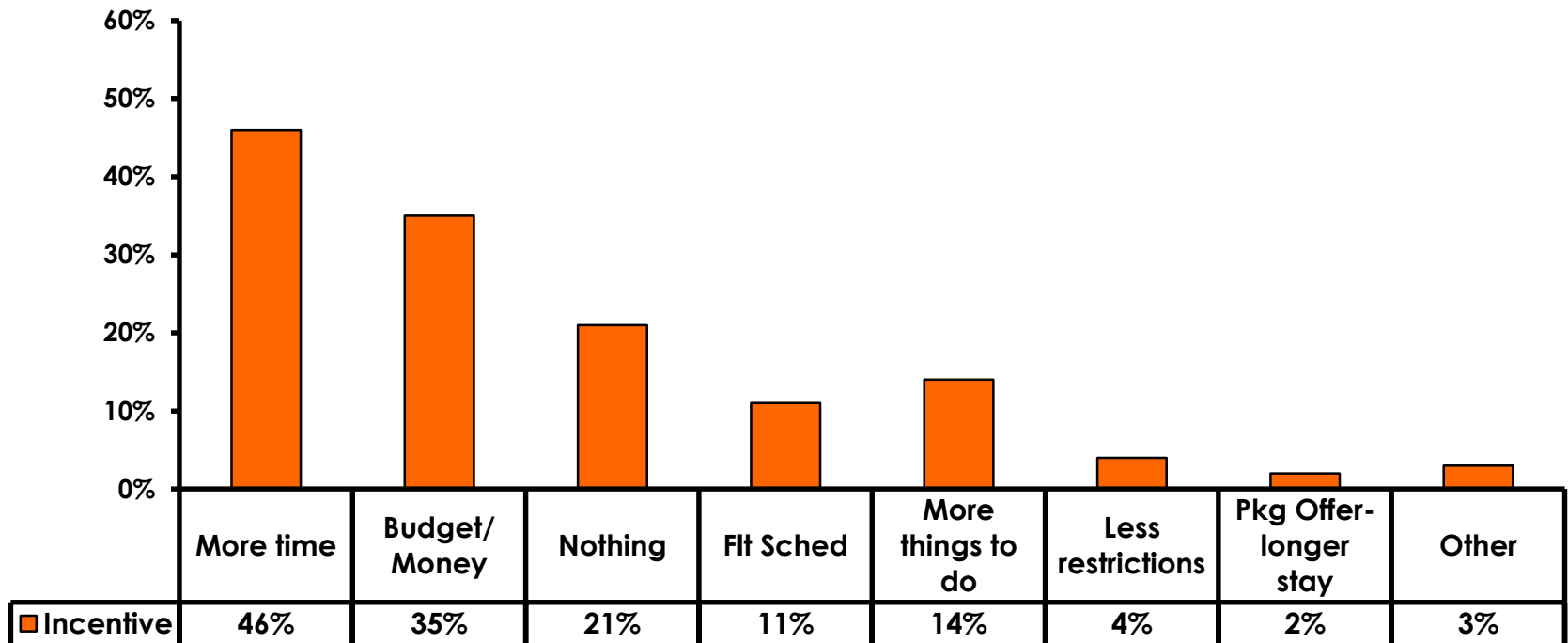
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>31%</b>	Score of 6 to 7 = <b>30%</b>
Score of 4 to 5 = <b>67%</b>	Score of 4 to 5 = <b>68%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>1%</b>
<b>MEAN = 4.85</b>	<b>MEAN = 4.84</b>

# Satisfaction with Other Activities



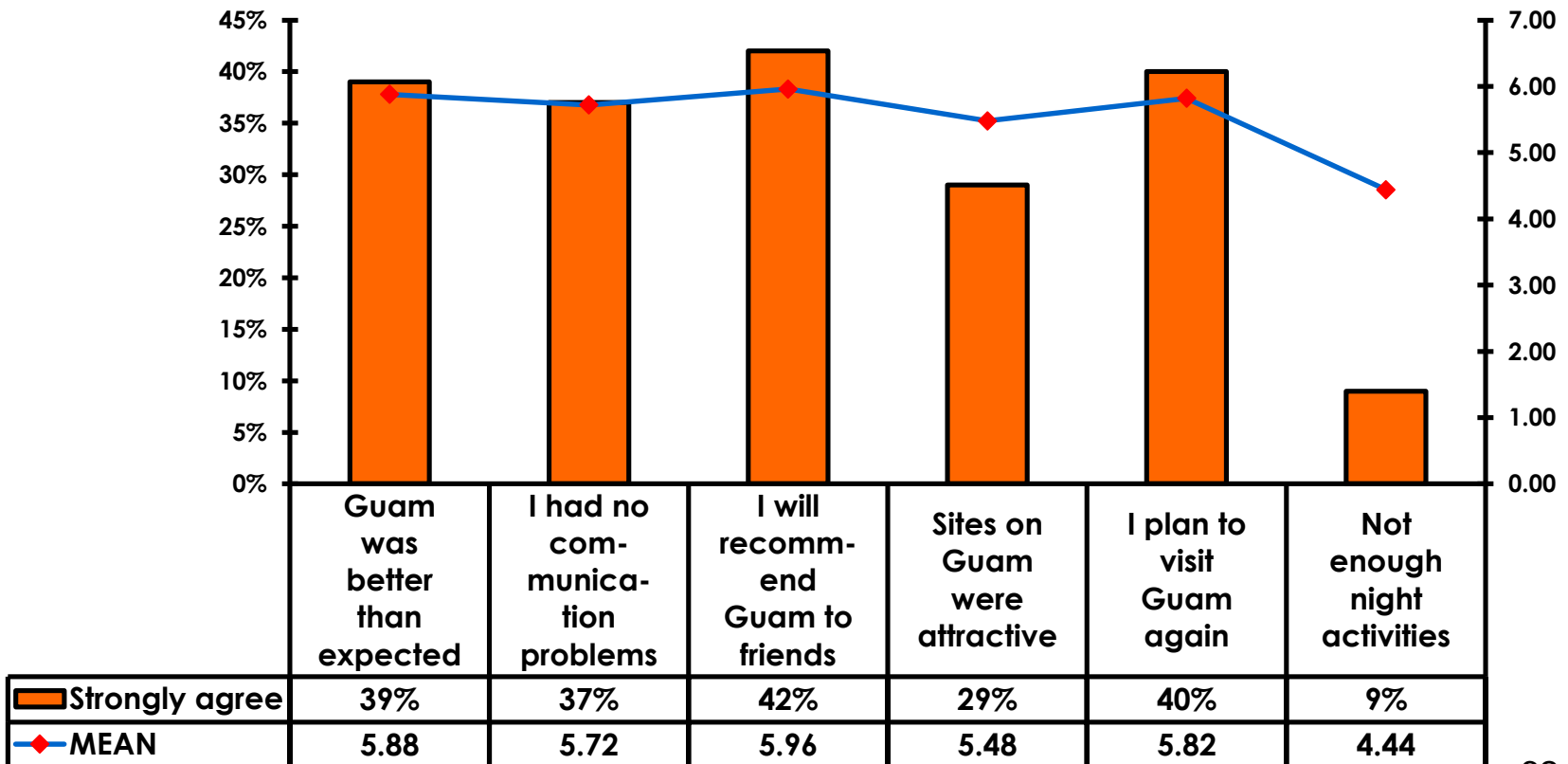
# What would it take to make you want to stay an extra day in Guam?



# On-Island Perceptions

7pt Rating Scale

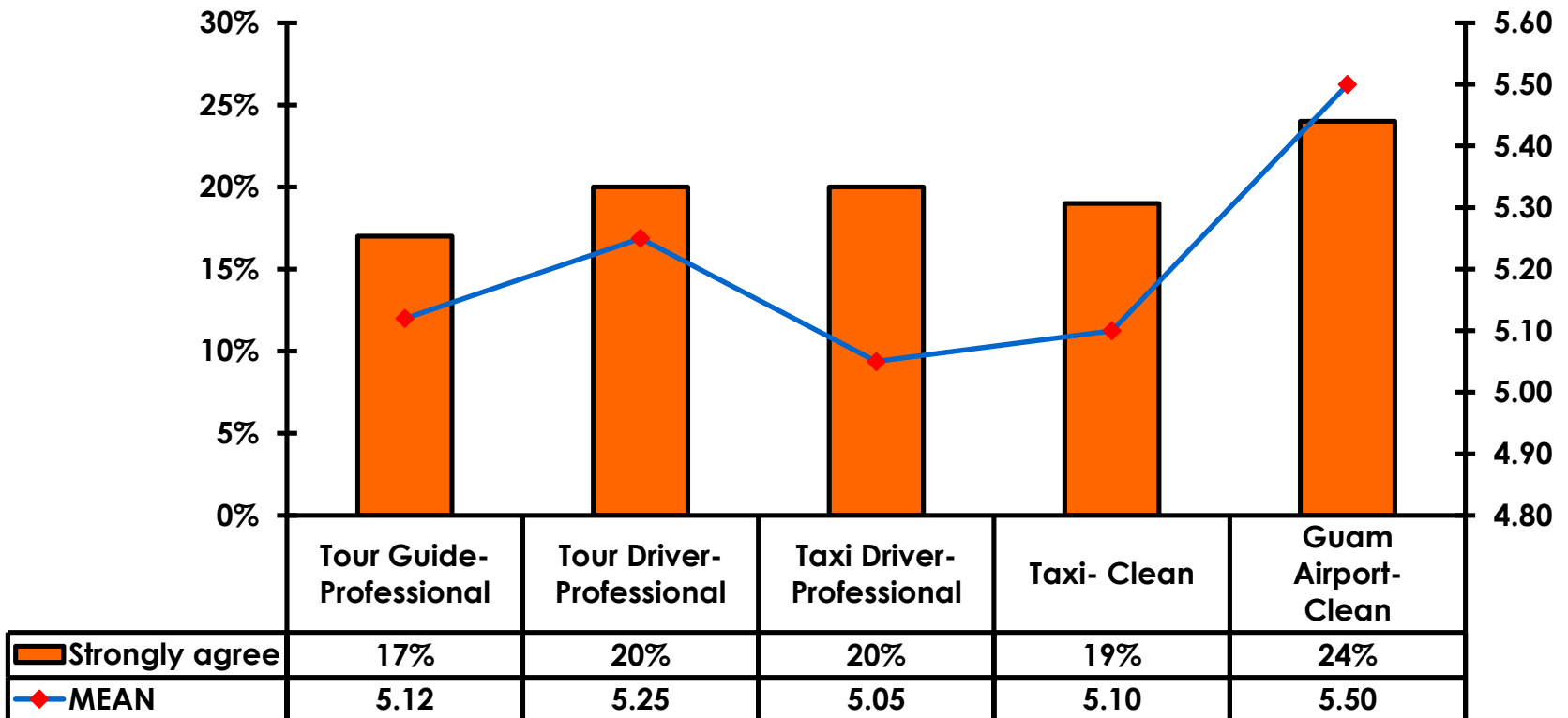
7=Very Satisfied/ 1=Very Dissatisfied



# On-Island Perceptions

7pt Rating Scale

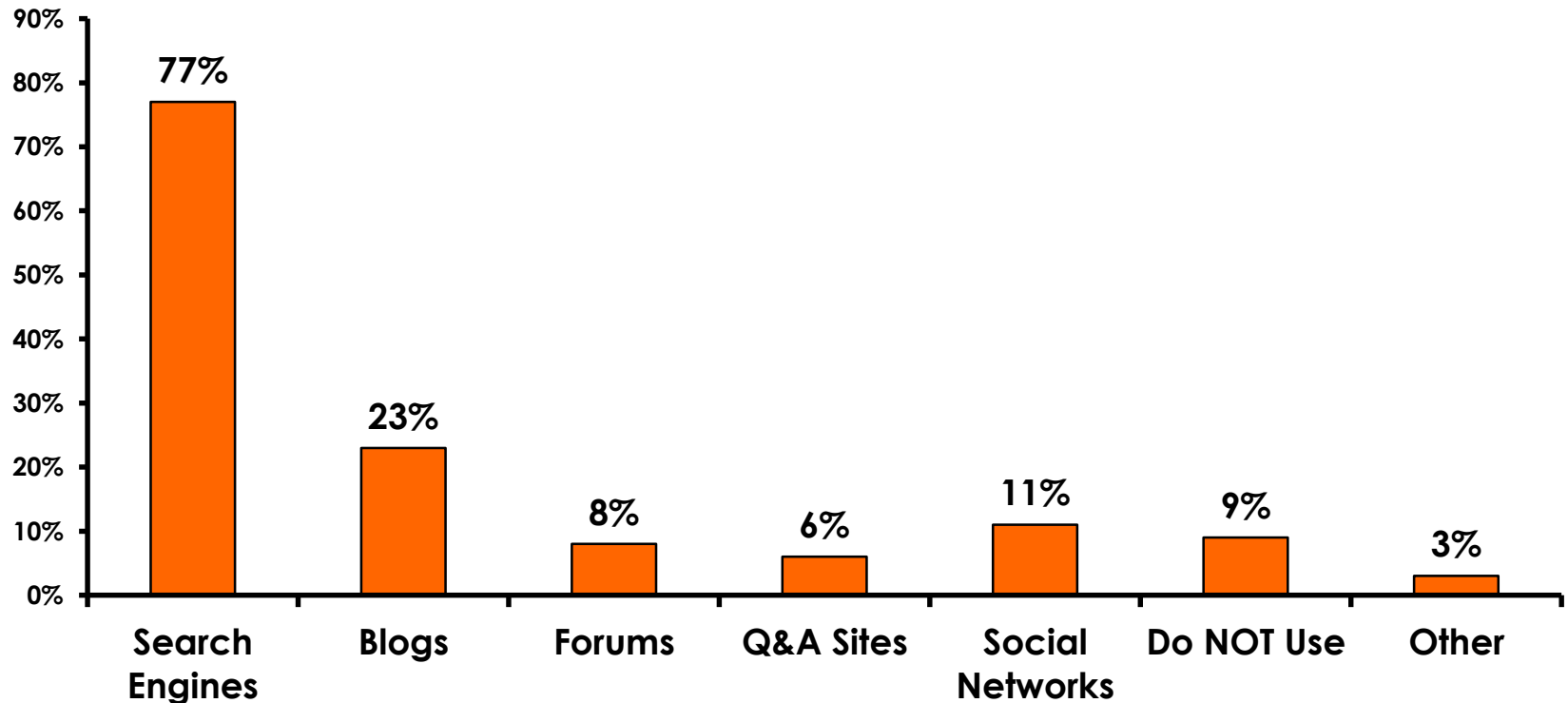
7=Very Satisfied/ 1=Very Dissatisfied



# SECTION 5 **PROMOTIONS**

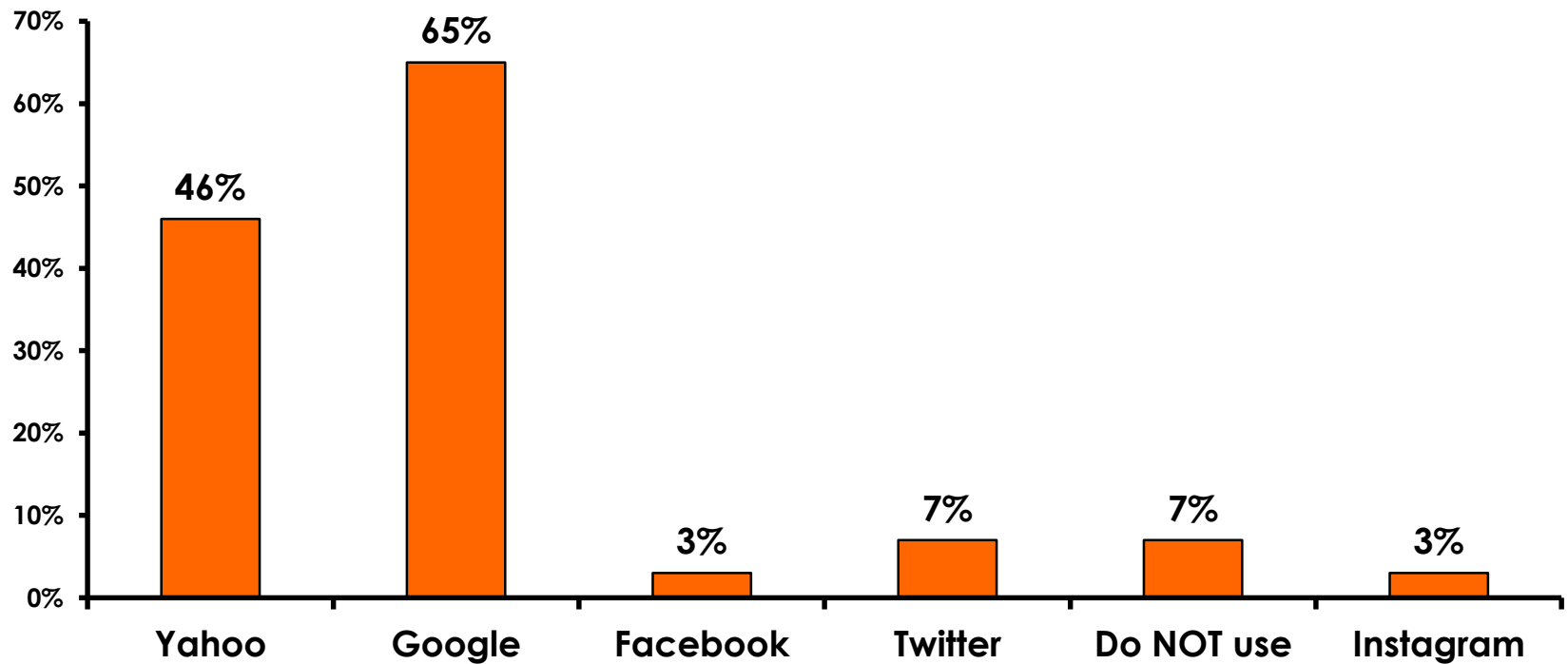


# Internet- Guam Sources of Info

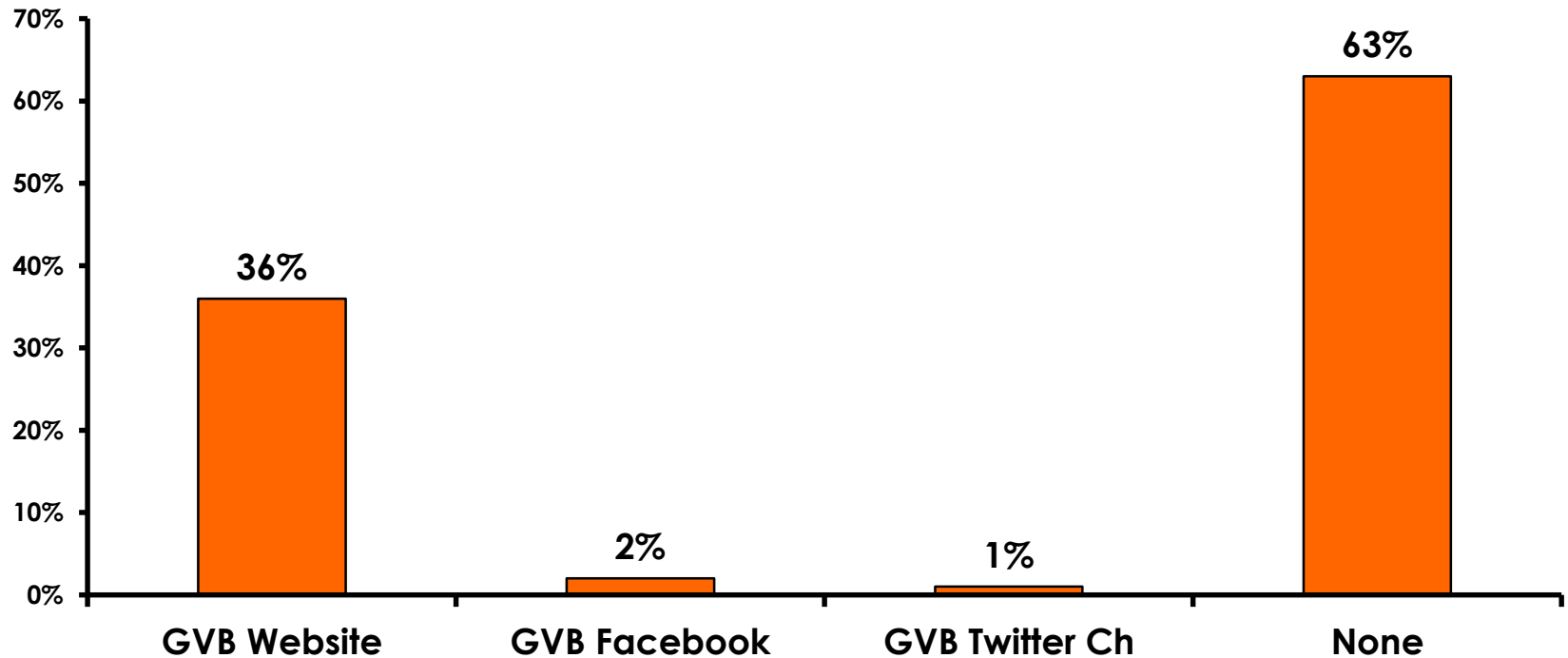


# Internet- Things To Do

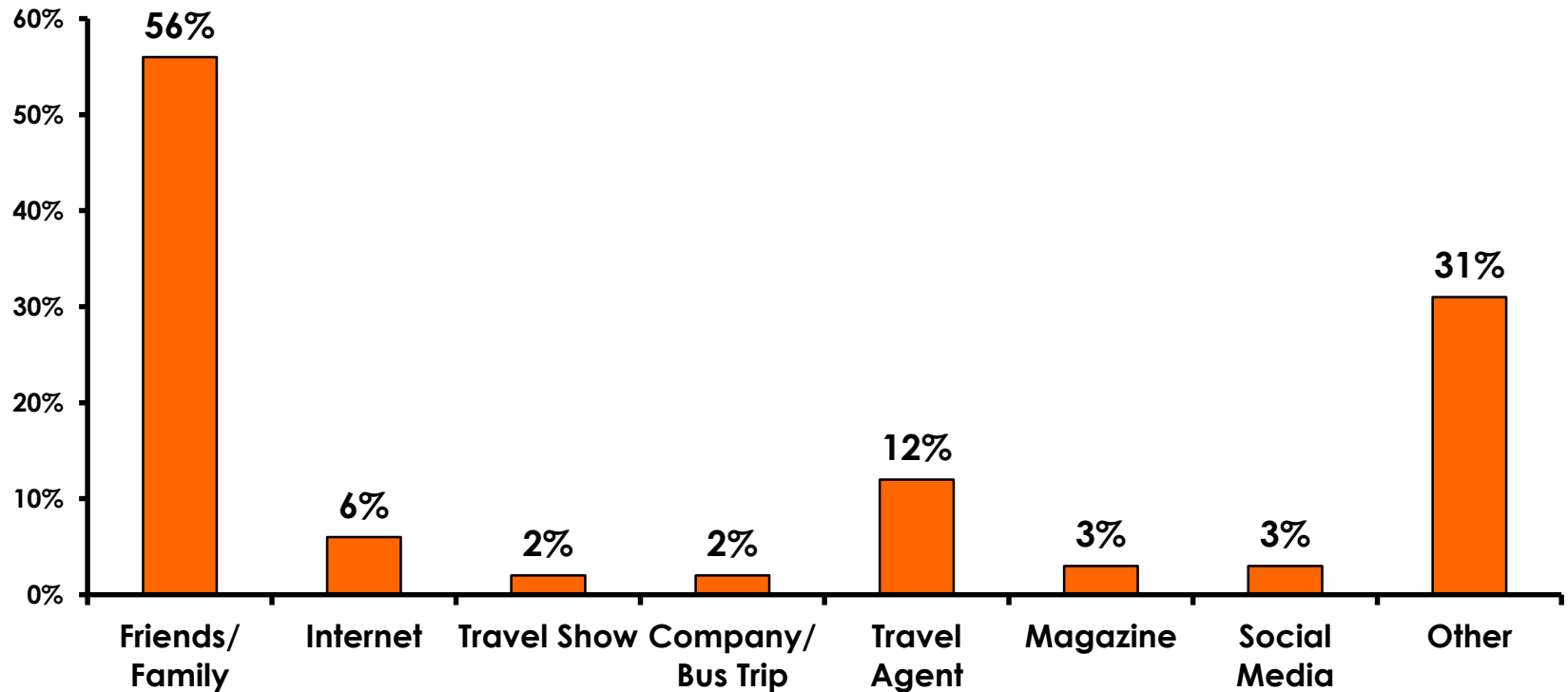
## Sources of Info



# Internet- GVB Sources

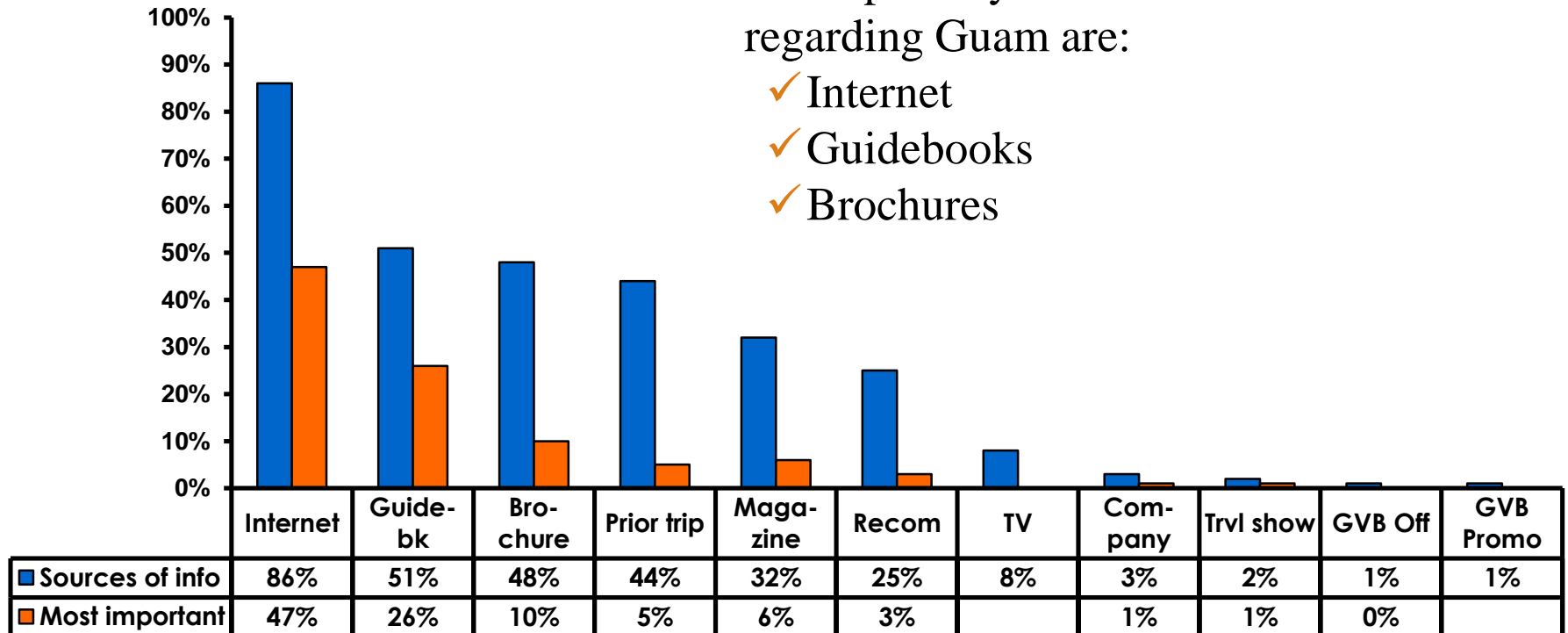


# Travel Motivation- Info Sources



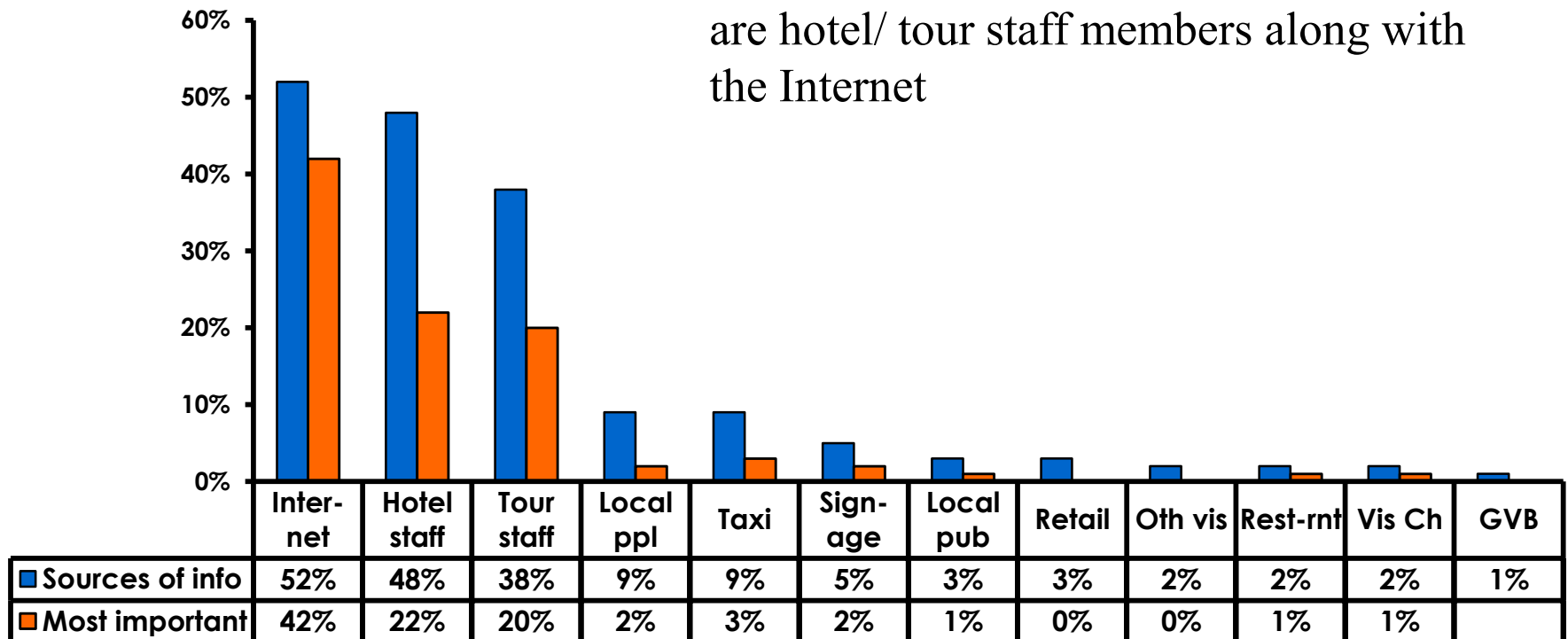
# Sources of Information Pre-arrival

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



# Sources of Information Post-arrival

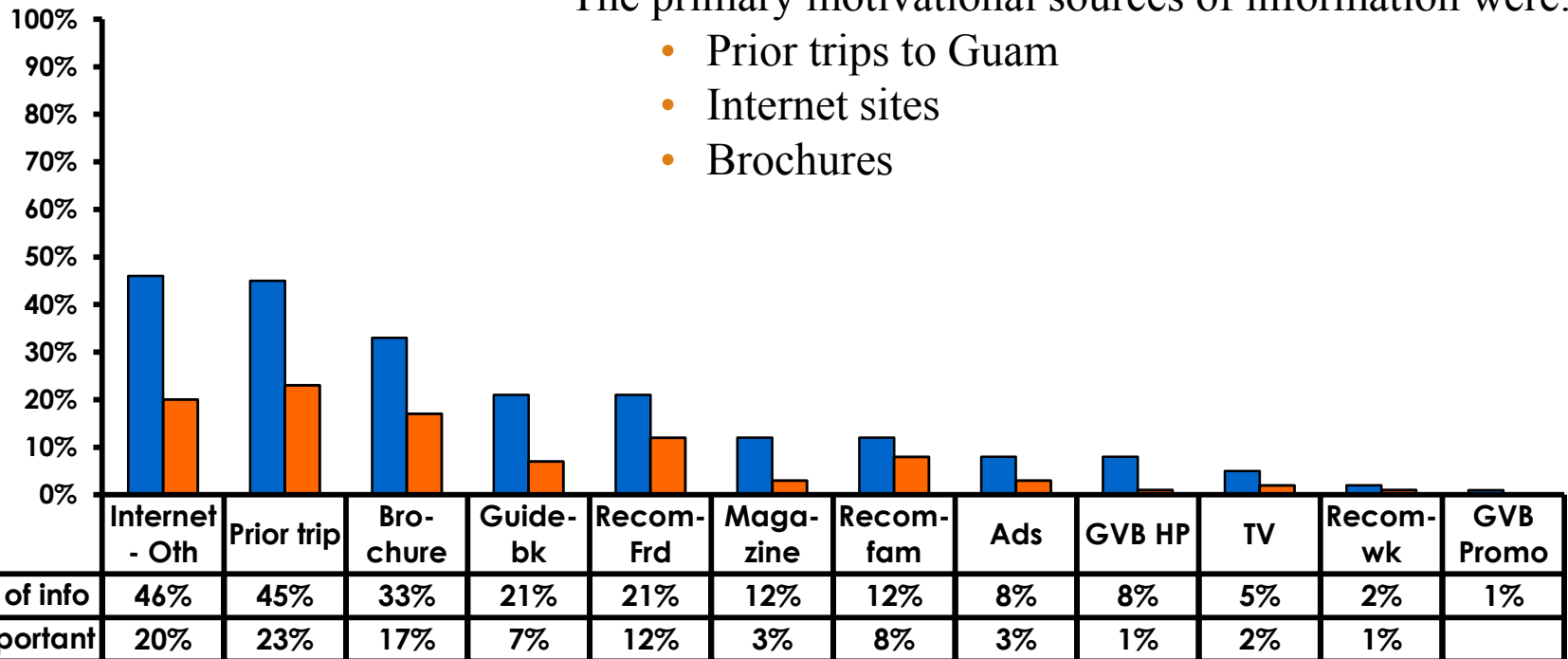
- The primary local source of information are hotel/ tour staff members along with the Internet



# Sources of Information - Motivation

The primary motivational sources of information were.

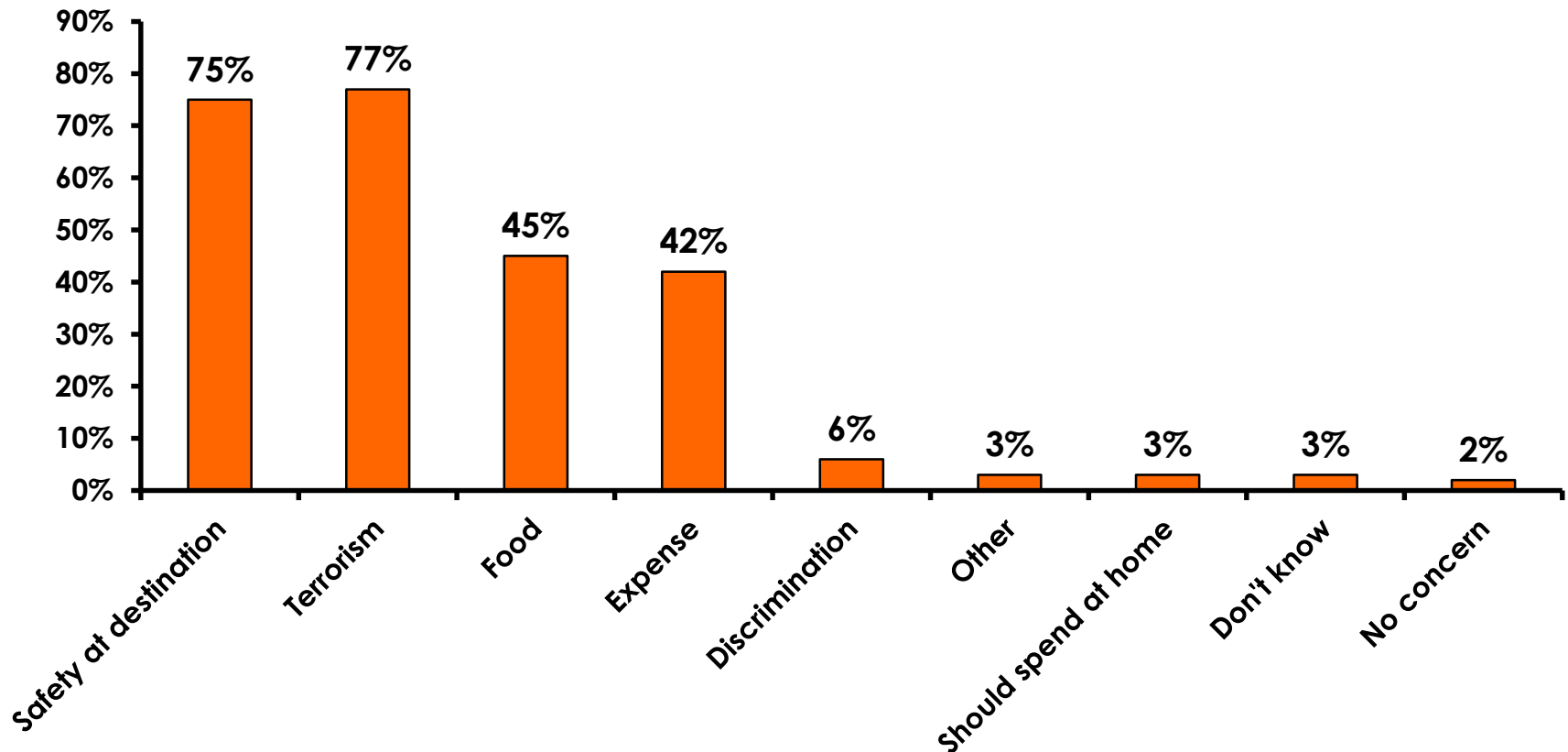
- Prior trips to Guam
- Internet sites
- Brochures



# SECTION 6 **OTHER ISSUES**



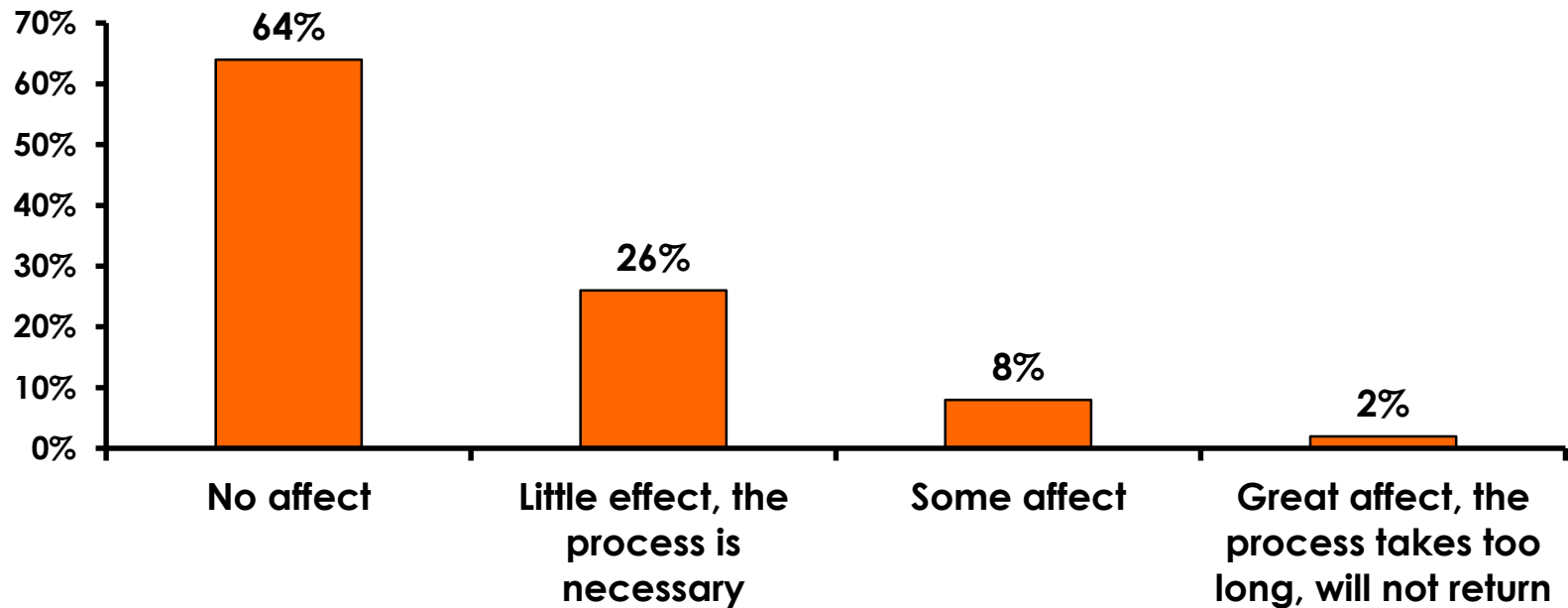
# Concerns about travel outside of Japan - Overall



# 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	Terrorism	77%	66%	84%	77%	88%	78%	81%	76%	81%	75%	76%	80%	67%	
	Safety	75%	75%	67%	78%	88%	67%	81%	81%	69%	77%	78%	77%	67%	
	Food	45%	41%	50%	45%	38%	56%	59%	52%	31%	42%	40%	45%	67%	
	Expense	42%	44%	39%	45%	33%	61%	44%	48%	38%	35%	42%	42%	33%	
	Discrimination against Japanese	6%	8%	5%	6%	4%	6%	7%	5%	4%	8%	5%	6%		
	Other	3%	5%	2%	3%		6%	4%	5%		6%	2%	2%		
	Don't know	3%	9%	1%		4%		4%		4%	2%		1%		
	Should spend at home	3%	4%	3%	1%	4%	6%	4%			4%	2%	1%	33%	
	No concerns	2%	1%	3%	1%	8%	6%			8%	2%	2%	3%		
	Total	Count	349	80	92	152	24	18	27	21	26	52	55	99	3

# Security Screening/ Immigration Process at Guam International Airport



# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

