



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2016

JANUARY 2016



Prepared by: QMark Research

Information contained herein is the property of the Guam Visitors Bureau.

The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.

Background & Methodology

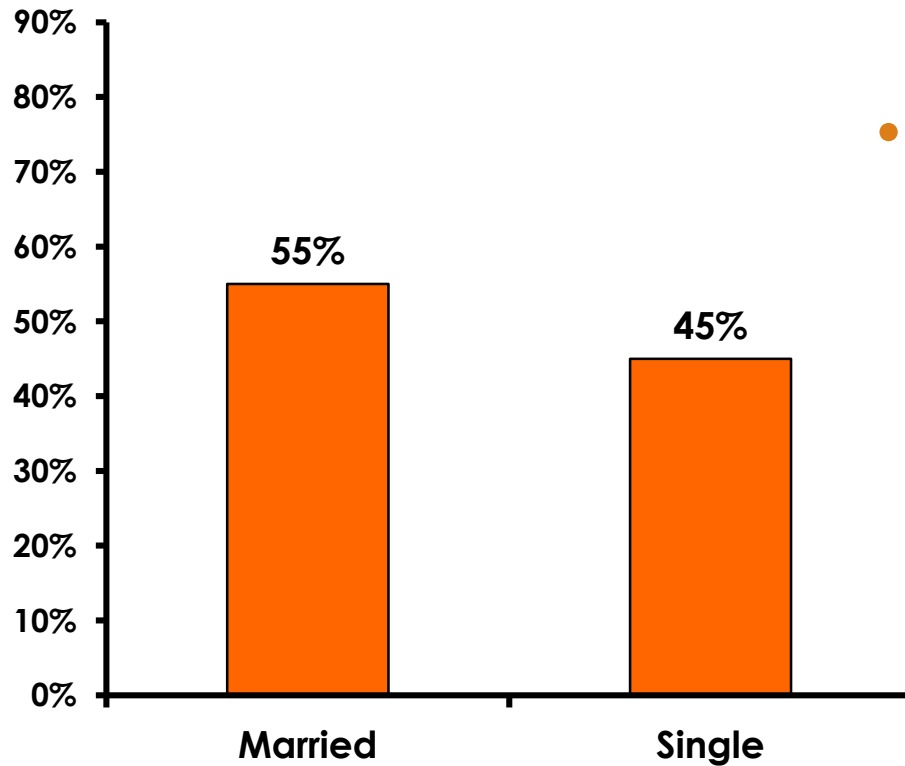
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **353** departing 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 **353** 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.

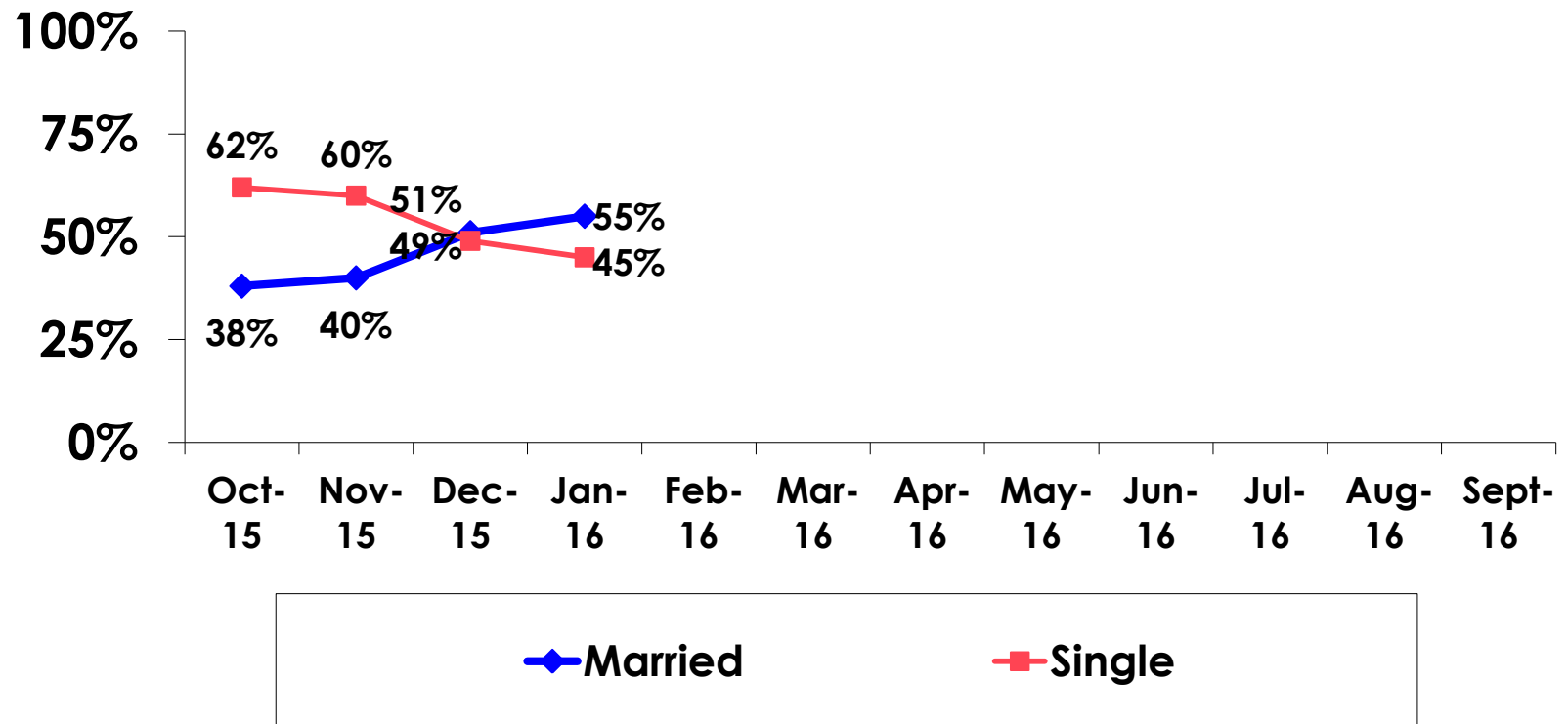
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

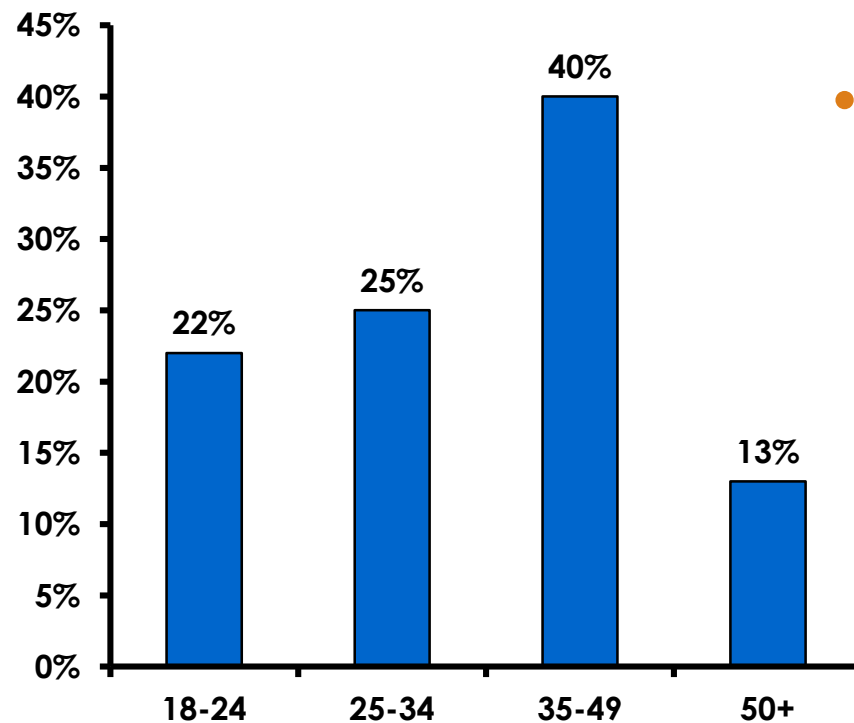


- 67% of repeat visitors are married.

MARITAL STATUS

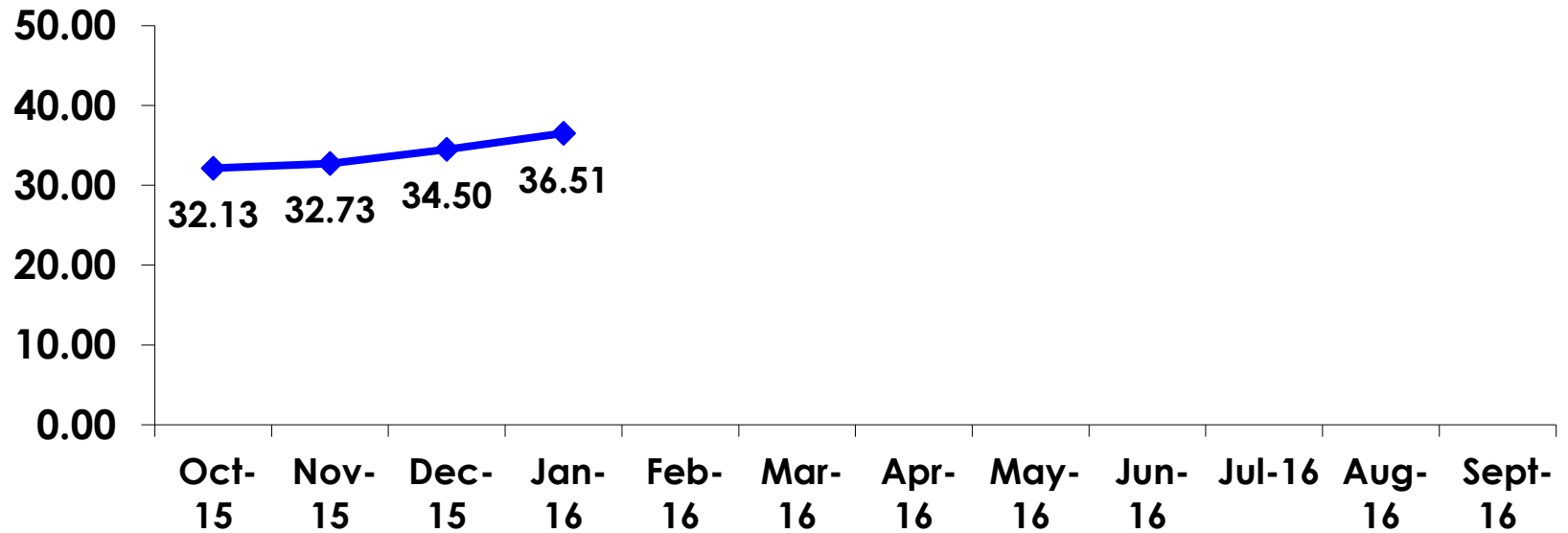


Age - Overall

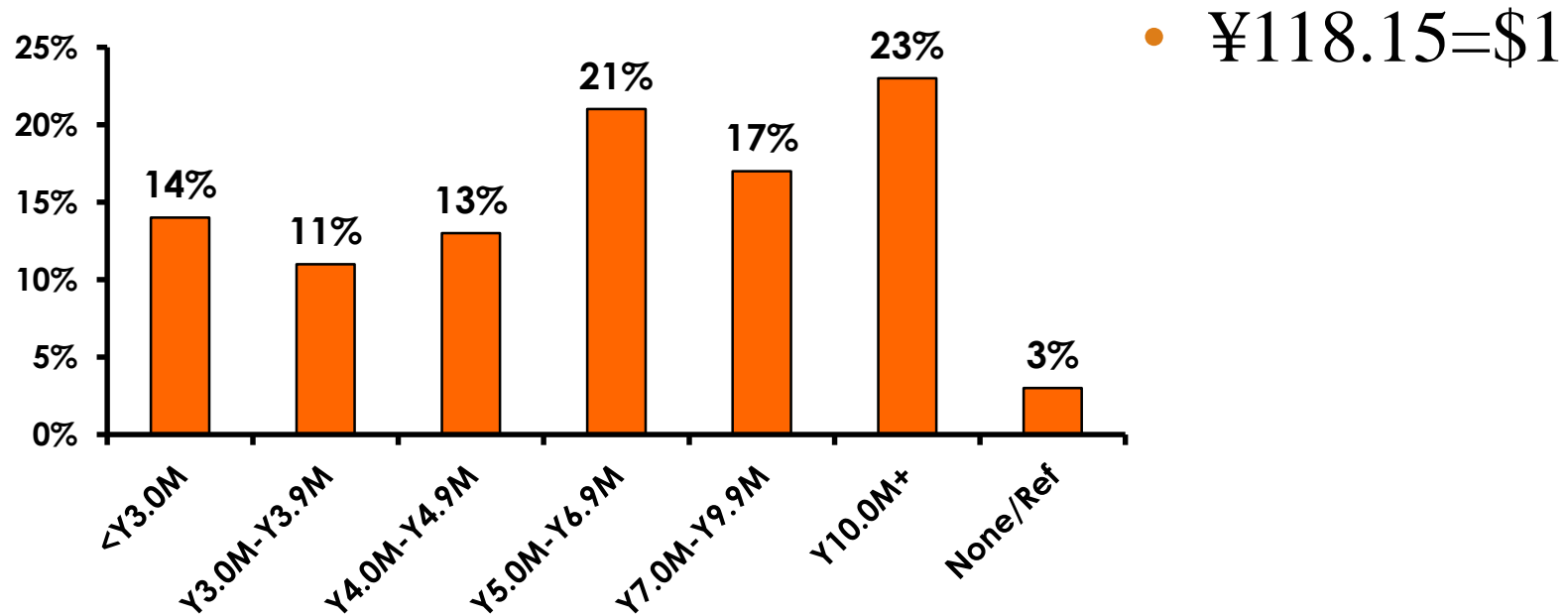


- The average age of the respondents is 36.51 years of age.

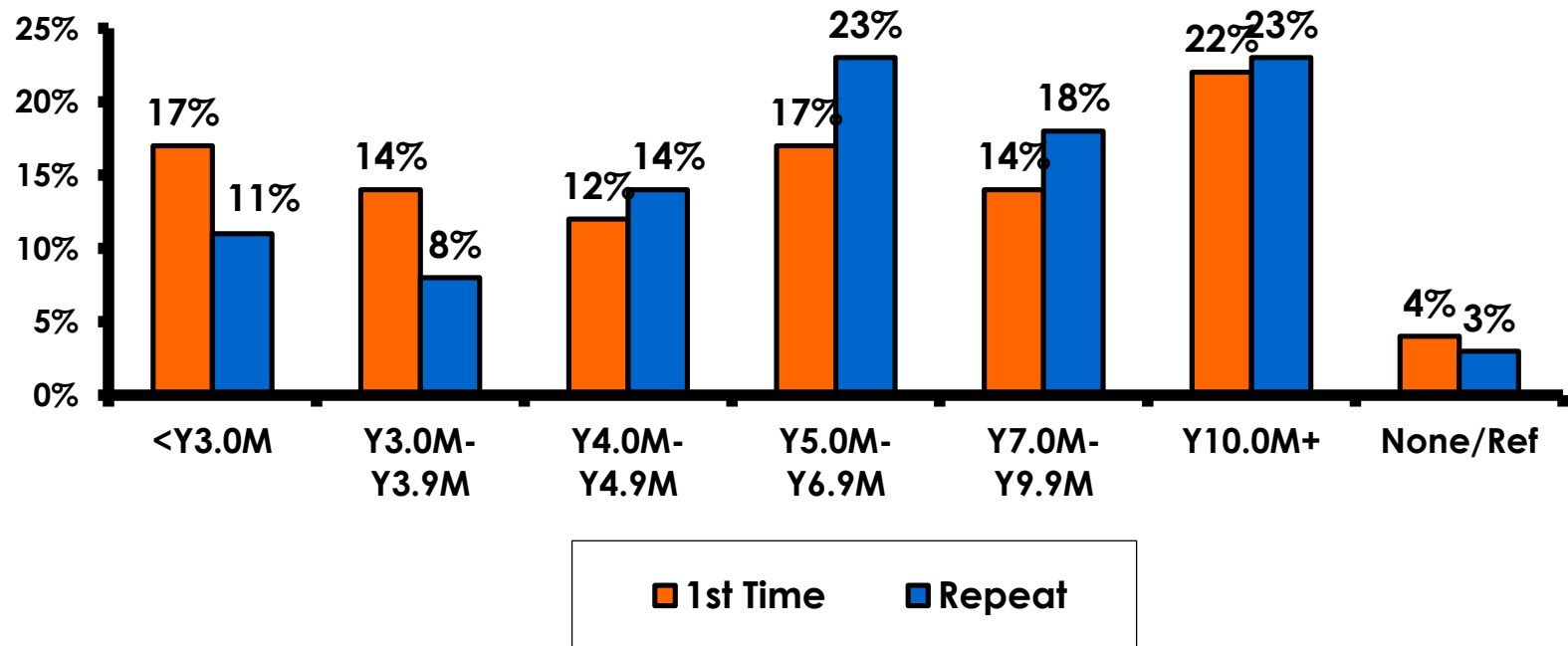
AVERAGE - AGE



Personal Income



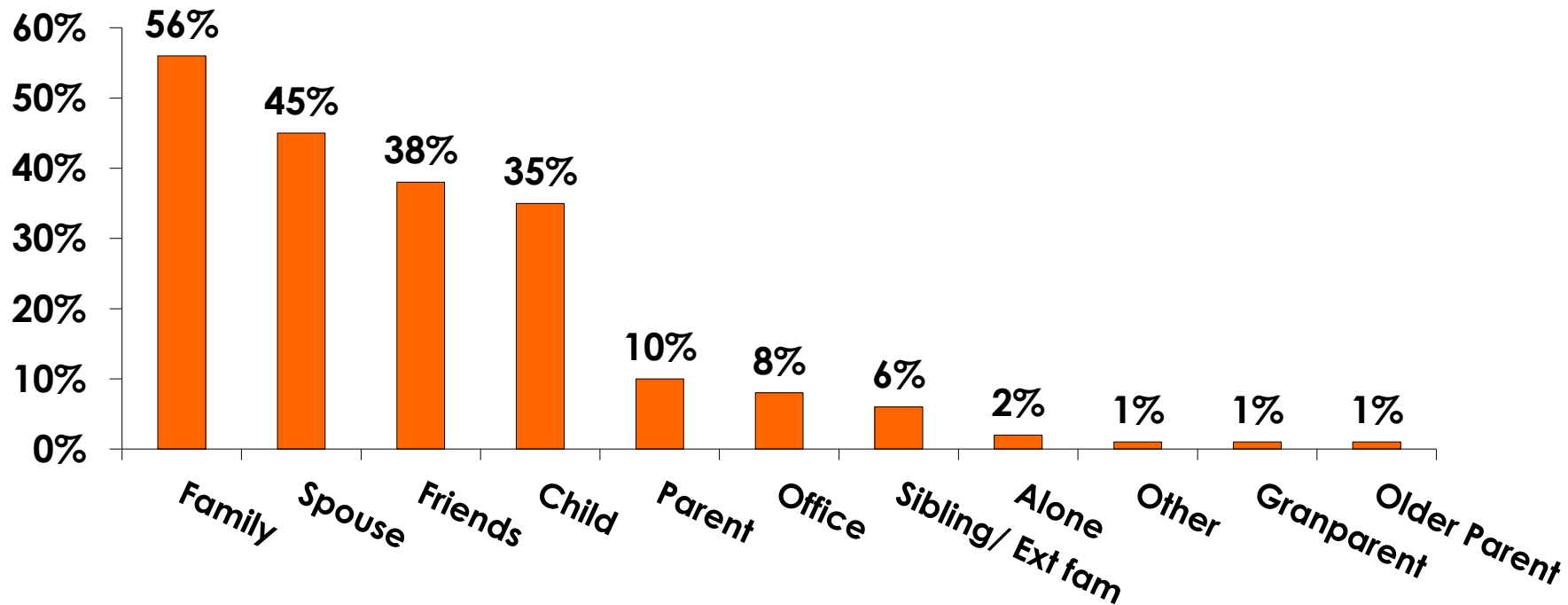
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	11	3	8	3	2	4	2
		Column N %	4%	2%	5%	5%	3%	3%	5%
Y2.0M-Y3.0M	Y2.0M-Y3.0M	Count	29	6	23	10	14	5	
		Column N %	10%	4%	16%	17%	18%	4%	
Y3.0M-Y4.0M	Y3.0M-Y4.0M	Count	32	9	23	7	16	6	3
		Column N %	11%	6%	16%	12%	21%	5%	7%
Y4.0M-Y5.0M	Y4.0M-Y5.0M	Count	39	18	21	11	8	17	3
		Column N %	13%	12%	14%	19%	10%	14%	7%
Y5.0M-Y7.0M	Y5.0M-Y7.0M	Count	62	38	24	5	14	33	10
		Column N %	21%	25%	16%	8%	18%	27%	24%
Y7.0M-Y10.0M	Y7.0M-Y10.0M	Count	50	31	19	5	7	27	11
		Column N %	17%	20%	13%	8%	9%	22%	27%
Y10.0M+	Y10.0M+	Count	68	41	27	10	15	32	11
		Column N %	23%	27%	18%	17%	19%	26%	27%
No Income	No Income	Count	10	7	3	8	1		1
		Column N %	3%	5%	2%	14%	1%		2%
Total	Total	Count	301	153	148	59	77	124	41

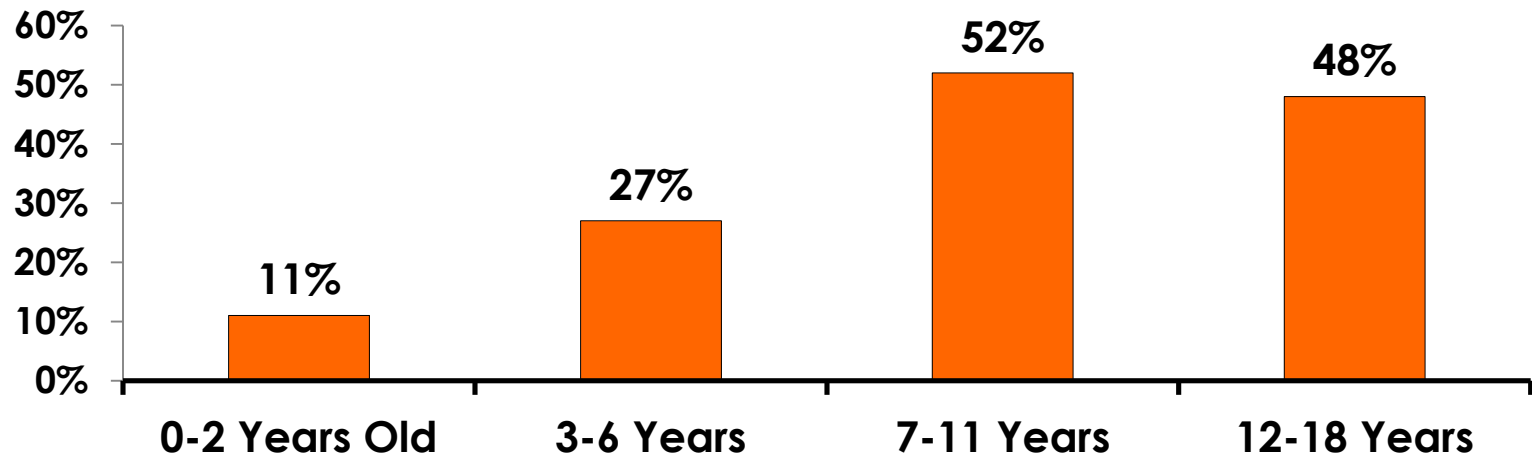
Travel Companions



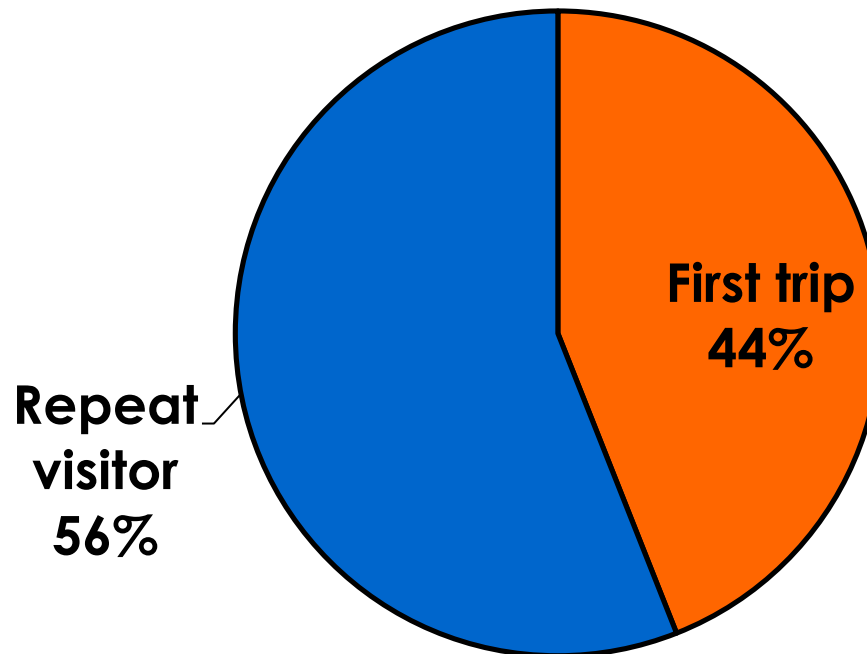
Number of Children Travel Party

N=121 total respondents traveling with children.

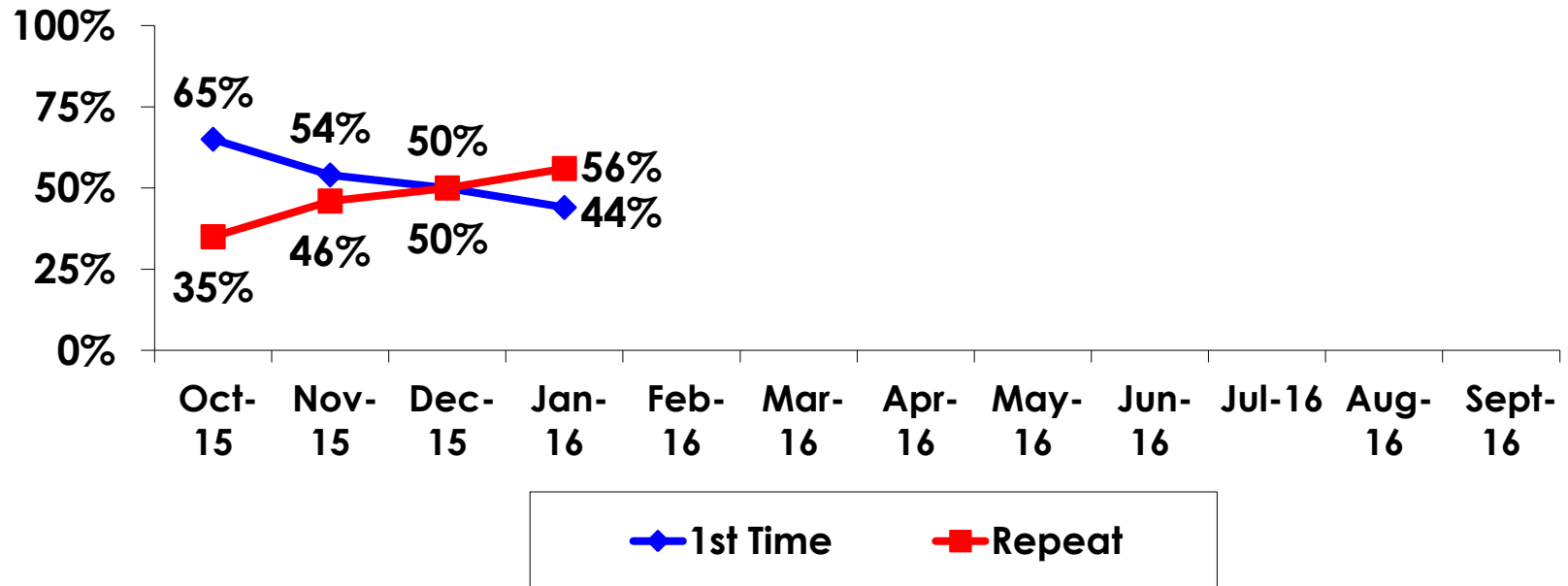
(Of those N=121 respondents, there is a total of 209 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



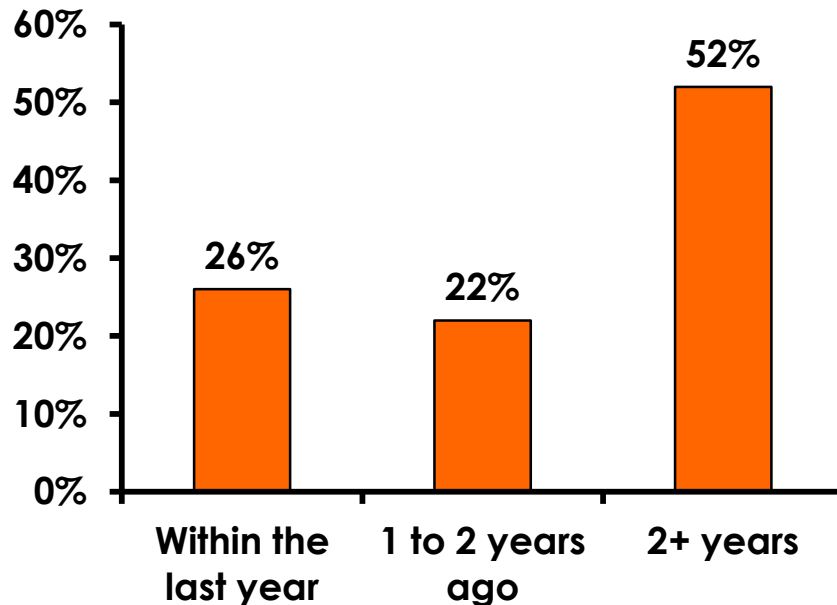
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	176	64	111	
		Column N %	50%	42%	56%	
	Female	Count	177	90	87	
		Column N %	50%	58%	44%	
	Total	Count	353	154	198	
AGE	18-24	Count	76	57	19	
		Column N %	22%	37%	10%	
	25-34	Count	90	49	41	
		Column N %	25%	32%	21%	
	35-49	Count	141	37	103	
		Column N %	40%	24%	52%	
	50+	Count	46	11	35	
		Column N %	13%	7%	18%	
		Total	Count	353	154	198

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

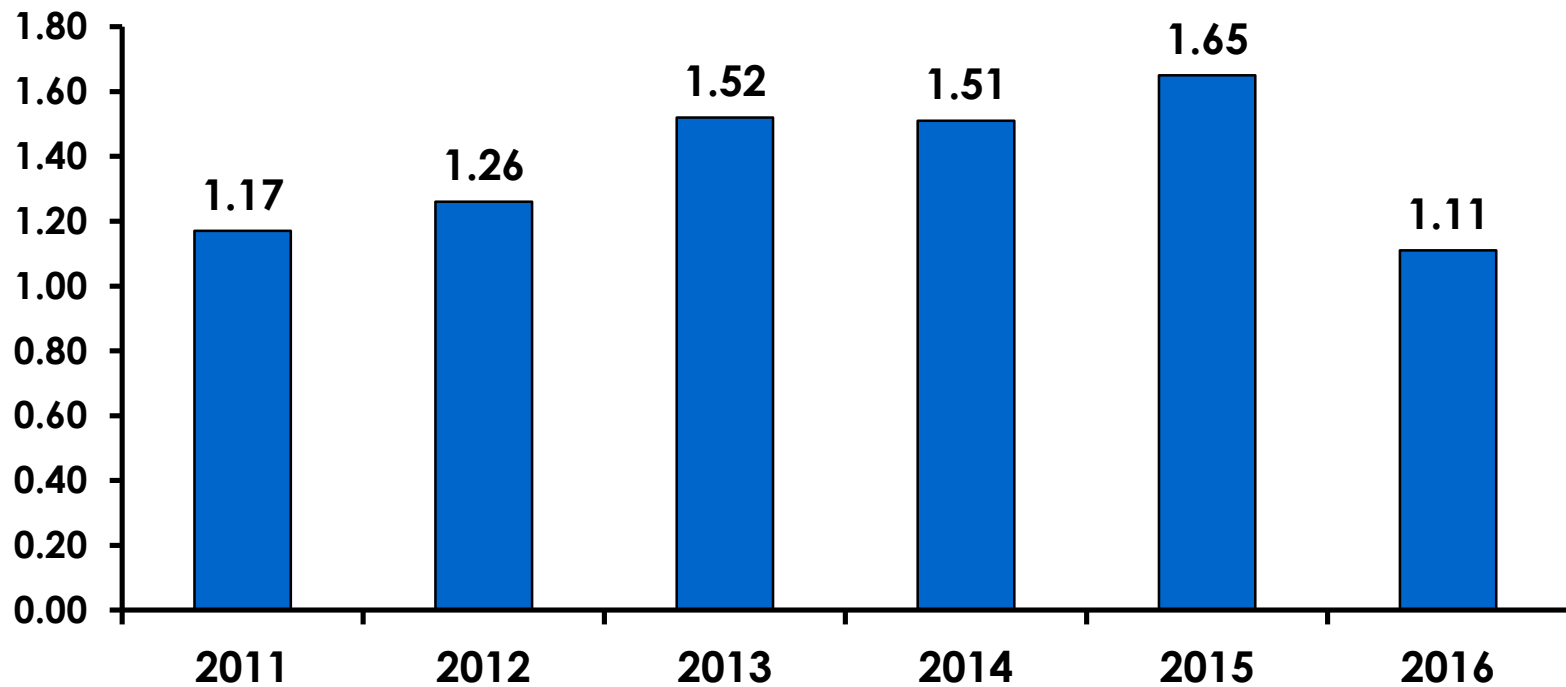
Repeat Visitors Last Trip

n = 196



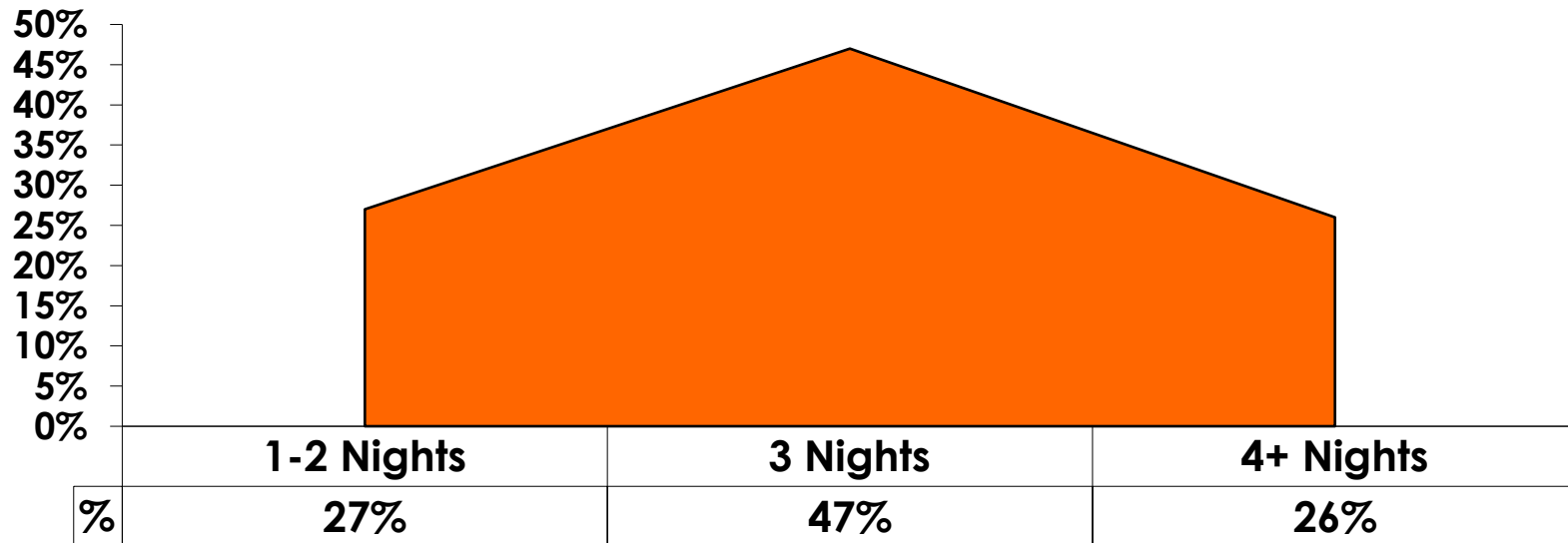
- The average repeat visitor has been to Guam 4.09 times.

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

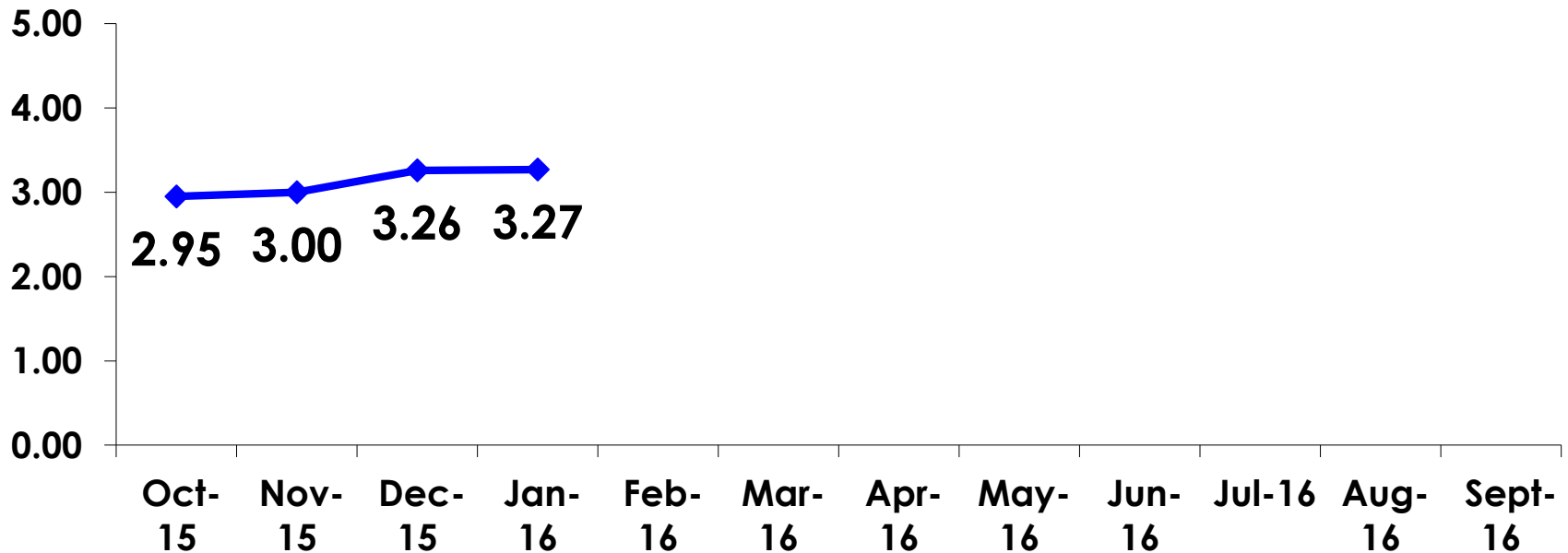


Length of Stay

Mean = 3.27 Days
Median = 3.0 Days



AVG LENGTH OF STAY

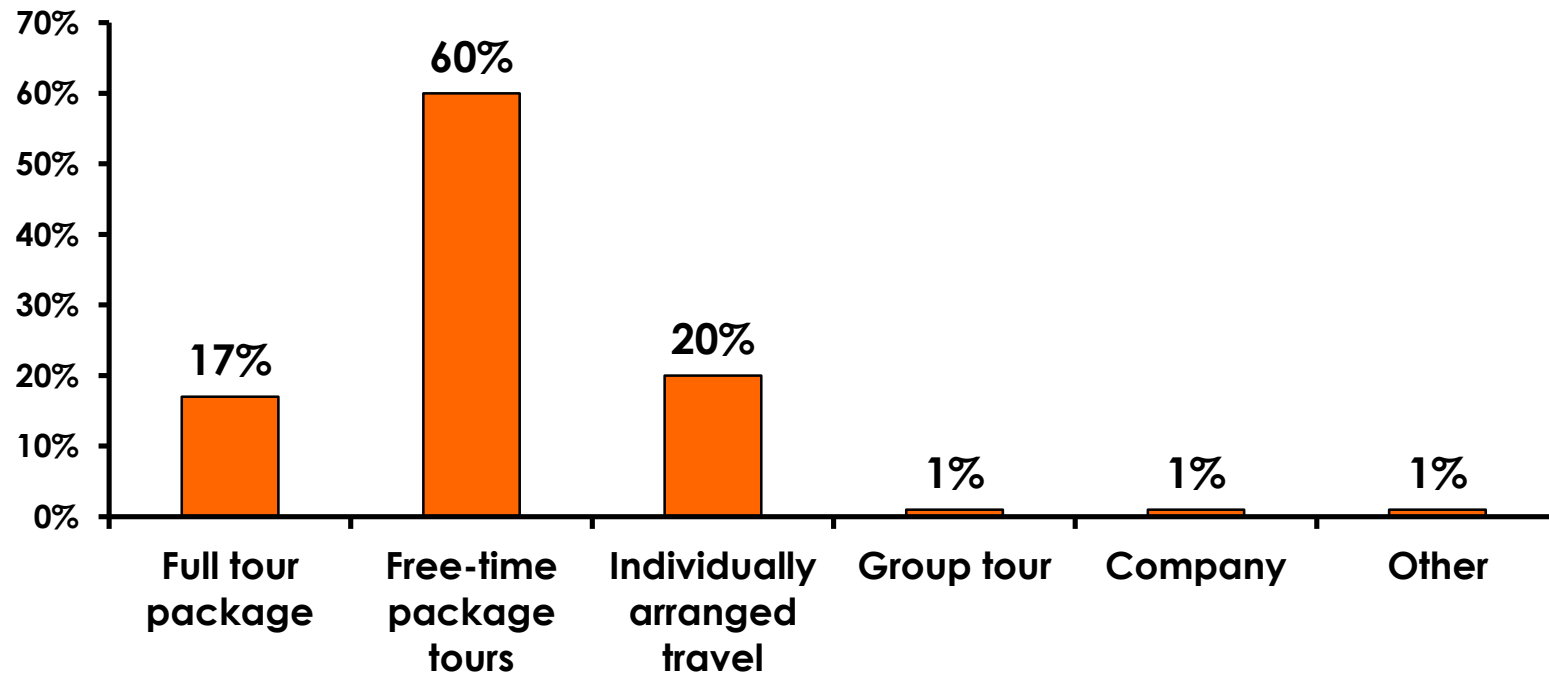


Occupation by Income

		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	
Q25	Self-employed	20%	9%	10%	13%	21%	24%	28%	29%	10%	
	Office worker non-mgr	17%	18%	41%	25%	13%	13%	14%	13%		
	Student	14%	18%	10%	13%	8%	6%	6%	10%	80%	
	Salesperson	10%	9%	3%	6%	23%	13%	4%	9%	10%	
	Engineer	9%		10%	9%	5%	15%	12%	4%		
	Homemaker	7%	18%	10%		5%	10%	4%	9%		
	Teacher	5%	9%	7%	13%	5%	5%	2%	4%		
	Manager	4%				3%	5%	14%	3%		
	Executive (30+ employees)	3%					3%	4%	10%		
	Professional/ Specialist	3%			9%		2%	4%	4%		
	Govt- office worker non-mgr	2%			6%	5%			1%		
	Freeter	2%	9%			5%	2%	4%			
	Skilled worker	2%		7%		5%	2%	2%			
	Other	1%	9%					2%	1%		
	Unemployed	1%				3%	2%				
	Retired	0%			3%						
	Govt- Manager	0%			3%						
	Total	Count	338	11	29	32	39	62	50	68	10

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall



Accommodation by Income

Average length of stay: 3.27 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	14%	18%	17%	19%	10%	16%	10%	7%	20%	
Outrigger Guam Resort	12%		3%	3%	13%	15%	24%	13%		
Royal Orchid Guam	9%	9%	17%	10%	10%	10%	14%		10%	
Hilton Guam Resort	8%	18%	3%	6%	8%	5%	12%	10%		
Holiday Resort Guam	7%	18%		16%	5%	5%	2%	4%	10%	
Guam Reef & Olive Spa	6%		3%	6%	10%	6%	4%	9%	20%	
Pacific Bay Hotel	5%		7%	10%	8%	6%	2%	3%		
Grand Plaza Hotel	5%	9%	10%	3%		6%		1%	20%	
PIC Club	4%		7%		3%	5%	6%	7%		
Fiesta Resort Guam	4%		7%	13%	5%	2%		4%		
Leo Palace Resort	4%		3%		8%	8%	6%	1%		
Onward Beach Resort	3%			3%	8%	2%	2%	4%		
Hotel Nikko Guam	3%	18%				3%	2%	4%		
Hyatt Regency Guam	2%						2%	10%		
Other	2%		3%				2%	1%	20%	
Pacific Star Resort & Spa	2%				5%	2%	2%	1%		
Condo	2%	9%	3%			3%		3%		
Sheraton Laguna Guam	2%			3%	3%	3%		1%		
Bayview Hotel	1%		7%	3%	3%		2%			
Westin Resort Guam	1%						2%	4%		
Dusit Thani Guam	1%		3%			2%		3%		
Hotel Santa Fe	1%				3%		2%	1%		
Aqua Suites	1%						2%	1%		
Tumon Bay Capital Hotel	0%		3%							
Days Inn (Tamuning)	0%			3%						
Home stay/ friend/ relative	0%						2%			
Oceanview Hotel	0%					2%				
Lotte Hotel Guam	0%							1%		
Total	Count	352	11	29	31	39	62	50	68	10

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

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

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	66%	72%	69%	61%	67%	61%	72%	
	Short travel time	61%	57%	54%	66%	67%	62%	60%	
	Pleasure	58%	71%	62%	52%	44%	53%	62%	
	Previous trip	46%	17%	39%	61%	64%	51%	42%	
	Relax	36%	33%	42%	36%	29%	32%	40%	
	Safe	33%	24%	31%	37%	38%	34%	31%	
	Shopping	32%	41%	38%	24%	31%	24%	41%	
	Recomm- friend/family/trvl agnt	24%	34%	29%	16%	18%	19%	29%	
	Water sports	22%	32%	20%	19%	18%	20%	23%	
	Price	21%	26%	20%	21%	11%	19%	22%	
	Scuba	8%	8%	12%	6%	7%	7%	10%	
	Golf	6%	1%	2%	8%	13%	7%	5%	
	Visit friends/ Relatives	4%	7%	3%	3%	7%	5%	4%	
	Other	4%	7%	1%	4%	2%	2%	5%	
	Company/ Business Trip	4%	3%		6%	7%	6%	1%	
	Married/ Attn wedding	3%	1%	3%	4%	4%	5%	2%	
	Organized sports	3%		2%	4%	2%	3%	2%	
	Honeymoon	2%	1%		5%		4%	1%	
	Company Sponsored	0%				2%	1%		
	Total	Count	351	76	90	140	45	176	175

Motivation by Income

		TOTAL	Q26								
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q5A	Natural beauty	66%	45%	62%	72%	64%	60%	76%	74%	50%	
	Short travel time	61%	73%	41%	88%	64%	58%	66%	61%	50%	
	Pleasure	58%	36%	62%	69%	62%	56%	46%	61%	70%	
	Previous trip	46%	36%	41%	25%	49%	61%	54%	55%	30%	
	Relax	36%	9%	38%	47%	33%	29%	48%	38%	10%	
	Safe	33%	9%	24%	38%	38%	39%	32%	38%	20%	
	Shopping	32%	36%	28%	47%	41%	32%	34%	23%	10%	
	Recomm- friend/family/trvl agnt	24%	45%	28%	38%	23%	15%	20%	21%	50%	
	Water sports	22%	18%	28%	16%	18%	15%	34%	23%	60%	
	Price	21%		14%	31%	18%	24%	26%	11%	30%	
	Scuba	8%		14%	16%	3%	10%	10%	6%		
	Golf	6%		10%		5%	8%	10%	6%		
	Visit friends/ Relatives	4%			9%	3%	3%	6%	5%	10%	
	Other	4%			3%	3%	6%	2%	3%		
	Company/ Business Trip	4%		3%	3%	5%	3%	6%	5%		
	Married/ Attn wedding	3%			6%	3%	2%	2%	6%		
	Organized sports	3%						4%	8%		
	Honeymoon	2%		3%	3%	5%	2%		5%		
	Company Sponsored	0%				3%					
	Total	Count	351	11	29	32	39	62	50	66	10

SECTION 3 **EXPENDITURES**

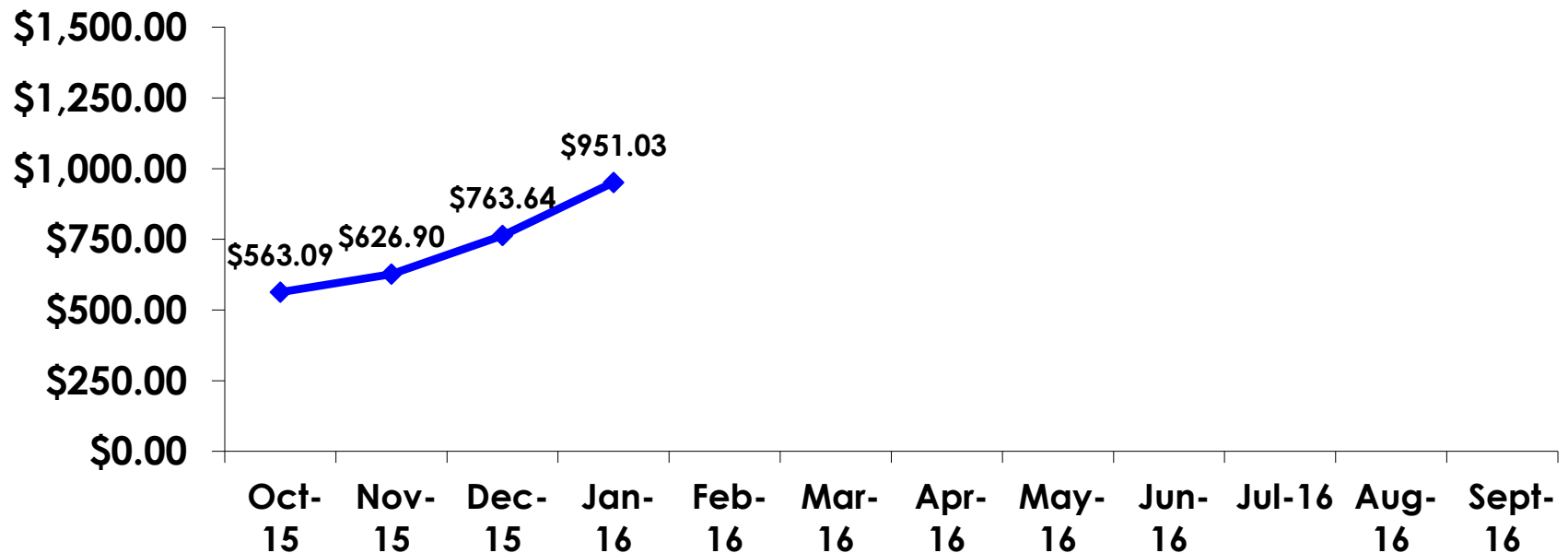
Prepaid Expenditures

¥118.15/US\$1

- \$2,374.42 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$21,160 = maximum (highest amount recorded for the entire sample)
- \$951.03 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$726.62

Breakdown of Prepaid Expenditures

¥118.15=\$1

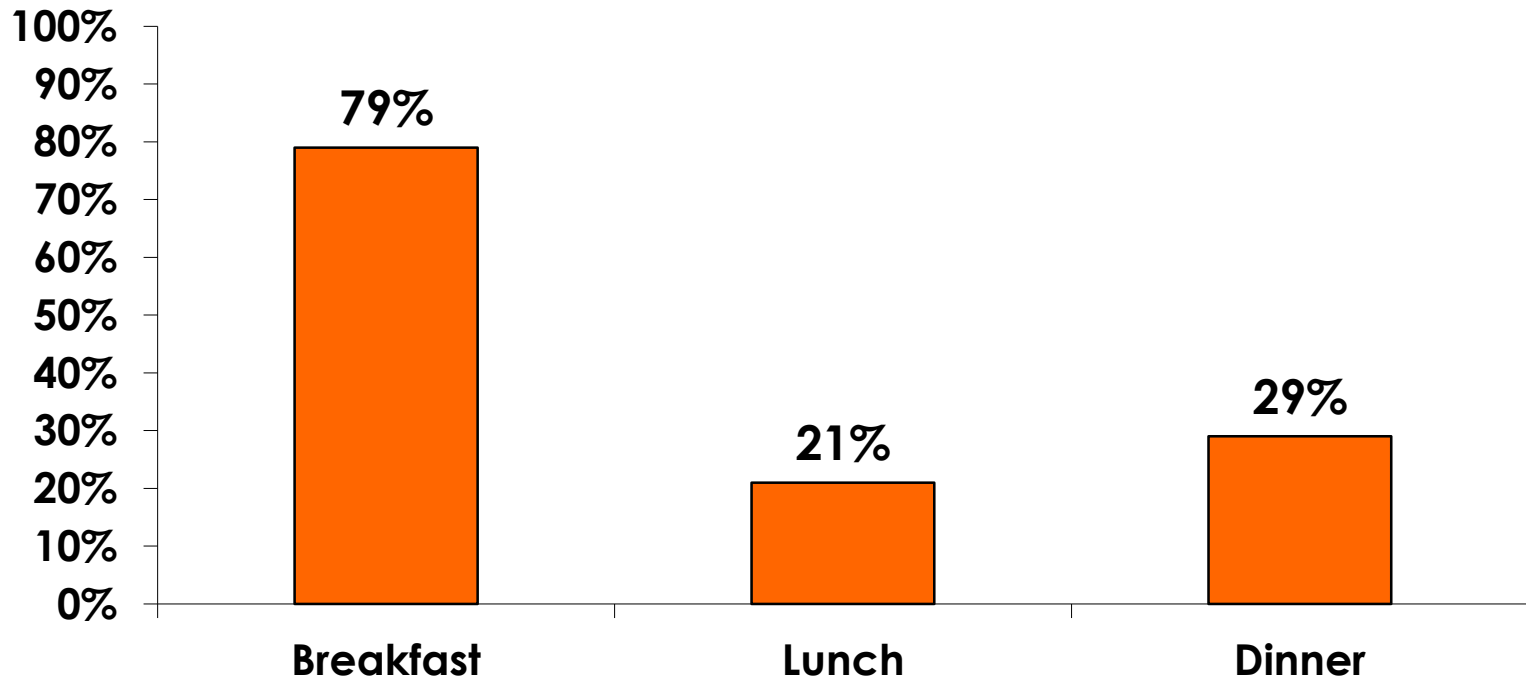
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$2,486.66
Air & Accommodation w/ daily meal package	\$3,549.56
Air only	\$1,610.65
Accommodation only	\$842.44
Accommodation w/ daily meal only	\$1,438.85
Food & Beverages in Hotel	\$-
Ground transportation – Japan	\$74.97
Ground transportation – Guam	\$53.20
Optional tours/ activities	\$335.06
Other expenses	\$642.83
Total Prepaid	\$2,374.42

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=24

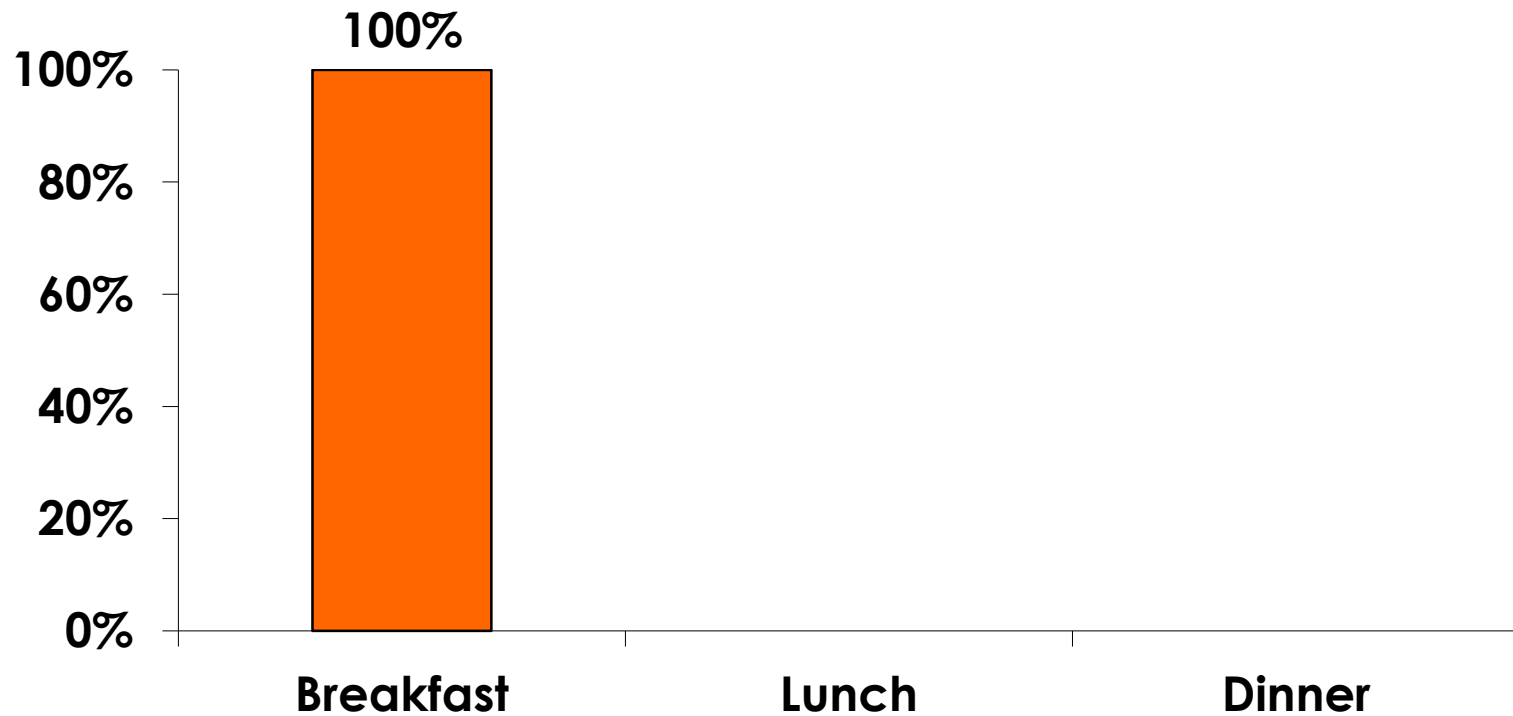


Mean=\$3,549.56 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

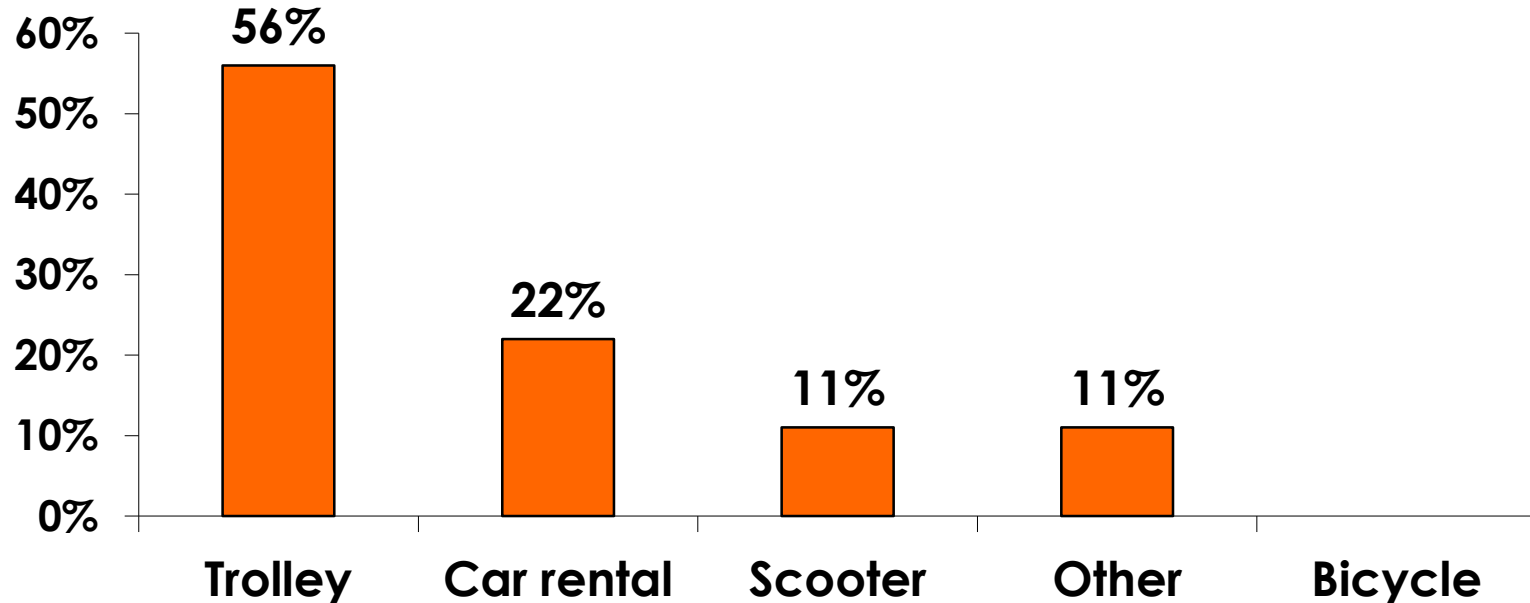
n=2



Mean=\$1,438.85 per travel party

PREPAID GROUND TRANSPORTATION

n=9



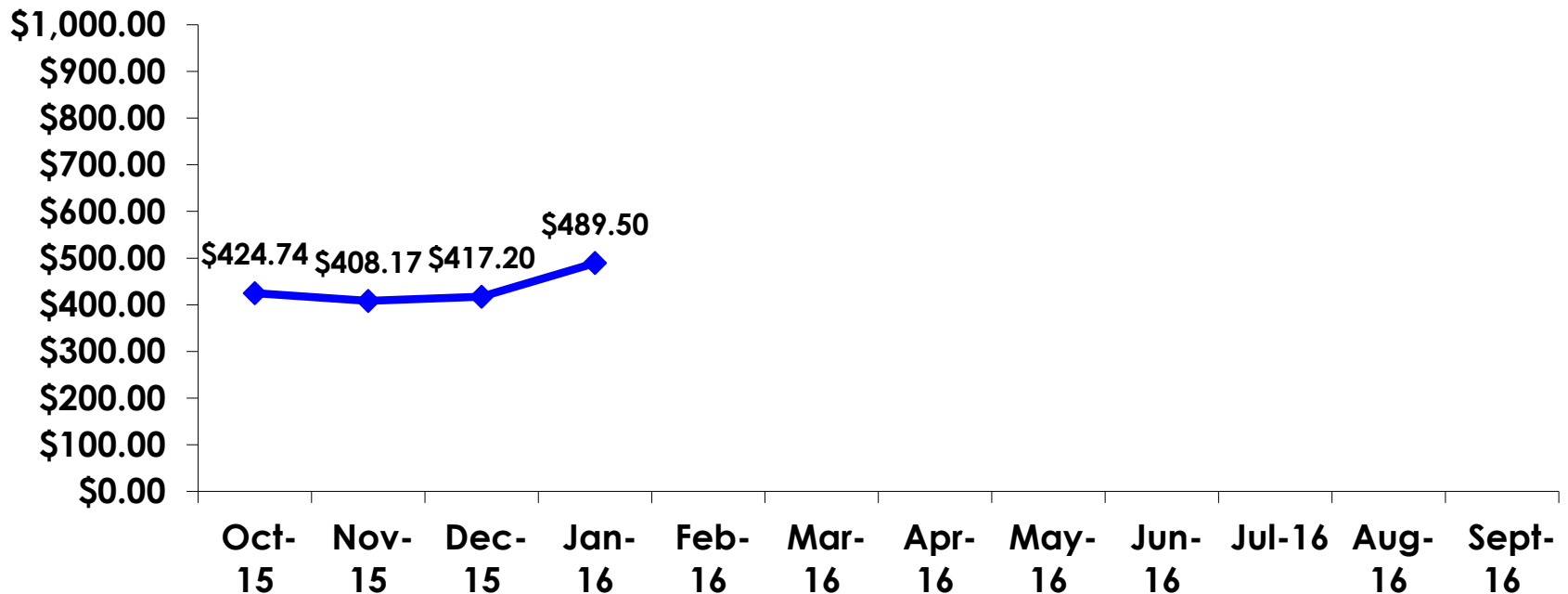
Mean=\$53.20 per travel party

On-Island Expenditures

- \$1,088.41 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$14,000 = Maximum (highest amount recorded for the entire sample)
- \$489.50 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

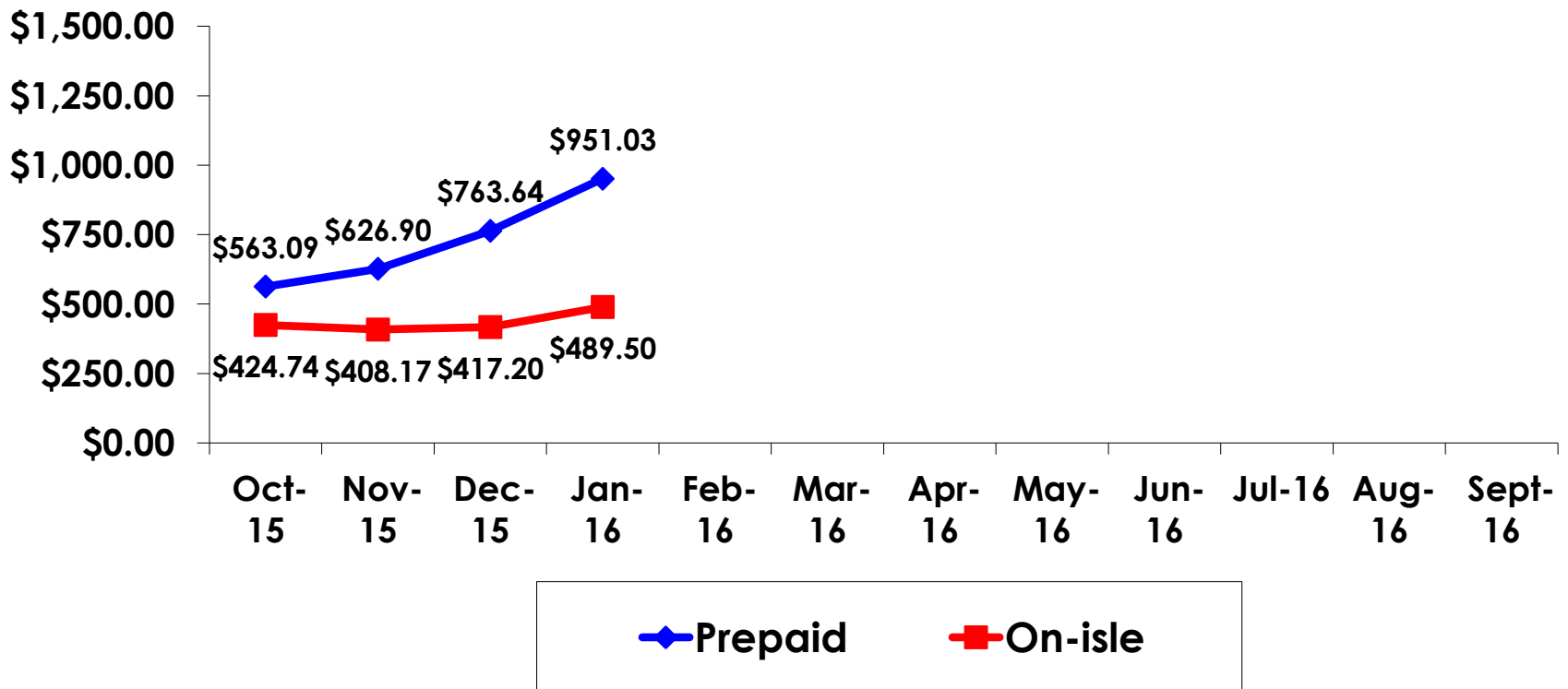


YTD = \$434.92

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$726.62

On-Isle YTD = \$434.92



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	\$434.92	\$437.56	\$432.35	\$395.87	\$394.31	\$445.76	\$542.11	\$386.39	\$491.63	\$406.01	\$479.27
	Median	\$333	\$333	\$332	\$325	\$345	\$333	\$370	\$300	\$390	\$303	\$400
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$4,667	\$4,667	\$3,720	\$1,800	\$2,000	\$4,667	\$4,000	\$3,720	\$3,000	\$2,540	\$2,054

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$43.24	\$60.24	\$26.74	\$15.20	\$24.58	\$82.87	\$62.57
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$35.36	\$41.93	\$28.99	\$22.85	\$32.64	\$46.90	\$45.42
	Median	\$2	\$10	\$0	\$0	\$0	\$10	\$10
F&B RESTRNT	Mean	\$96.08	\$133.91	\$59.35	\$41.57	\$76.41	\$137.46	\$170.50
	Median	\$10	\$50	\$0	\$0	\$0	\$50	\$50
OPT TOUR	Mean	\$68.54	\$82.57	\$54.92	\$50.38	\$55.98	\$89.79	\$93.44
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$179.08	\$206.00	\$152.95	\$91.87	\$196.53	\$222.79	\$235.66
	Median	\$10	\$20	\$10	\$5	\$0	\$30	\$50
GIFT- OTHER	Mean	\$105.68	\$121.32	\$90.51	\$73.23	\$90.95	\$121.75	\$178.71
	Median	\$50	\$50	\$30	\$20	\$40	\$50	\$100
TRANS	Mean	\$21.09	\$25.13	\$17.17	\$11.61	\$14.20	\$34.00	\$30.52
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$227.15	\$250.23	\$204.74	\$152.24	\$184.43	\$335.07	\$263.01
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$776.01	\$921.33	\$634.96	\$458.95	\$675.03	\$1,070.60	\$1,079.83
	Median	\$500	\$600	\$400	\$335	\$500	\$750	\$800

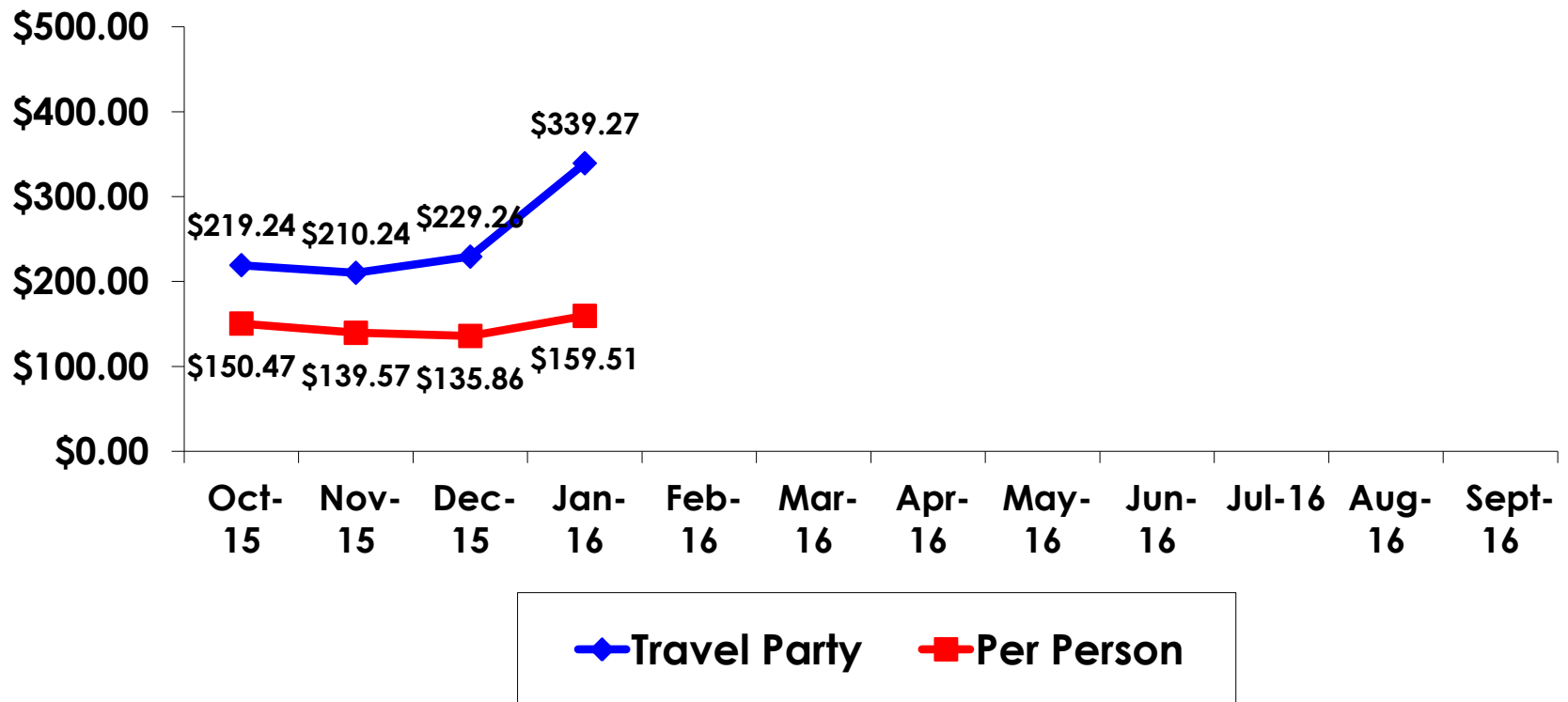
On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$43.24	\$28.83	\$59.86
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$35.36	\$28.12	\$42.13
	Median	\$2	\$0	\$10
F&B RESTRNT	Mean	\$96.08	\$80.72	\$113.34
	Median	\$10	\$0	\$30
OPT TOUR	Mean	\$68.54	\$65.64	\$72.24
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$179.08	\$151.37	\$211.47
	Median	\$10	\$0	\$30
GIFT- OTHER	Mean	\$105.68	\$92.61	\$121.00
	Median	\$50	\$30	\$50
TRANS	Mean	\$21.09	\$12.40	\$31.04
	Median	\$0	\$0	\$0
OTHER	Mean	\$227.15	\$159.87	\$302.61
	Median	\$0	\$0	\$0
TOTAL	Mean	\$776.01	\$619.16	\$953.70
	Median	\$500	\$425	\$600

ON-ISLE EXPENDITURES – Per Day

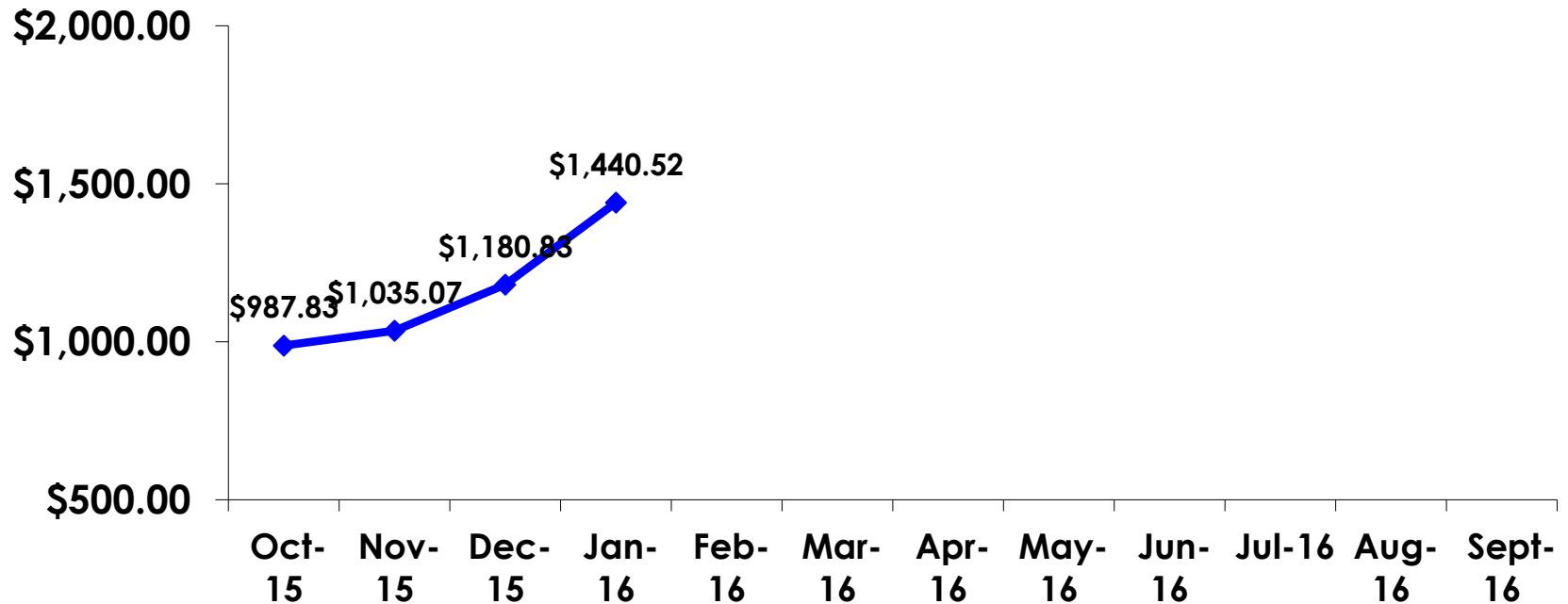
Travel Party YTD = \$249.60 Per Person YTD = \$146.33



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,440.52 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,488 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



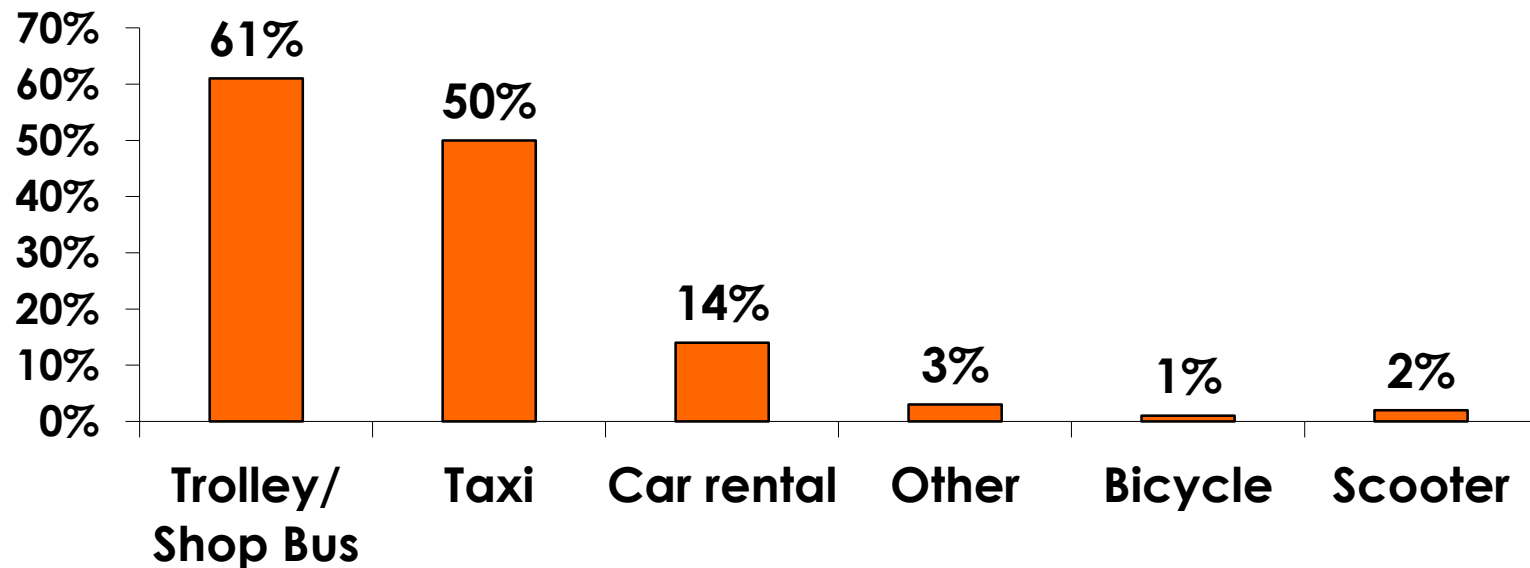
YTD=\$1,161.53

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$71.01
Food & beverage in fast food restaurant/convenience store	\$39.85
Food & beverage at restaurants or drinking establishments outside a hotel	\$113.01
Optional tours and activities	\$106.45
Gifts/ souvenirs for yourself/companions	\$220.50
Gifts/ souvenirs for friends/family at home	\$129.91
Local transportation	\$34.56
Other expenses not covered	\$373.97
Average Total	\$1,088.41

Local Transportation

n=103



Mean=\$34.56 per travel party

Guam Airport Expenditures

- \$33.07 = Mean
- \$10 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

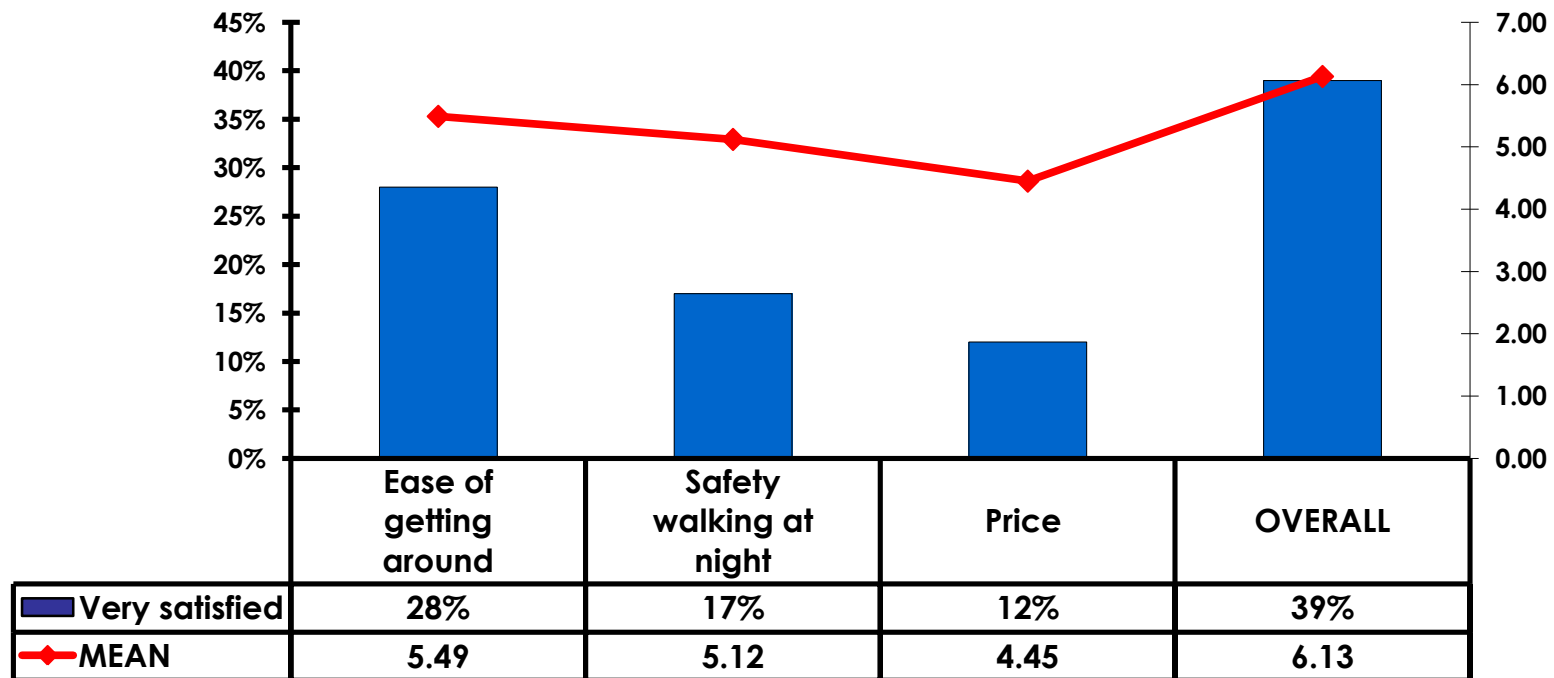
	MEAN \$
Food & Beverages	\$10.41
Gifts/Souvenirs Self	\$9.76
Gifts/Souvenirs Others	\$12.76
Total	\$33.07

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

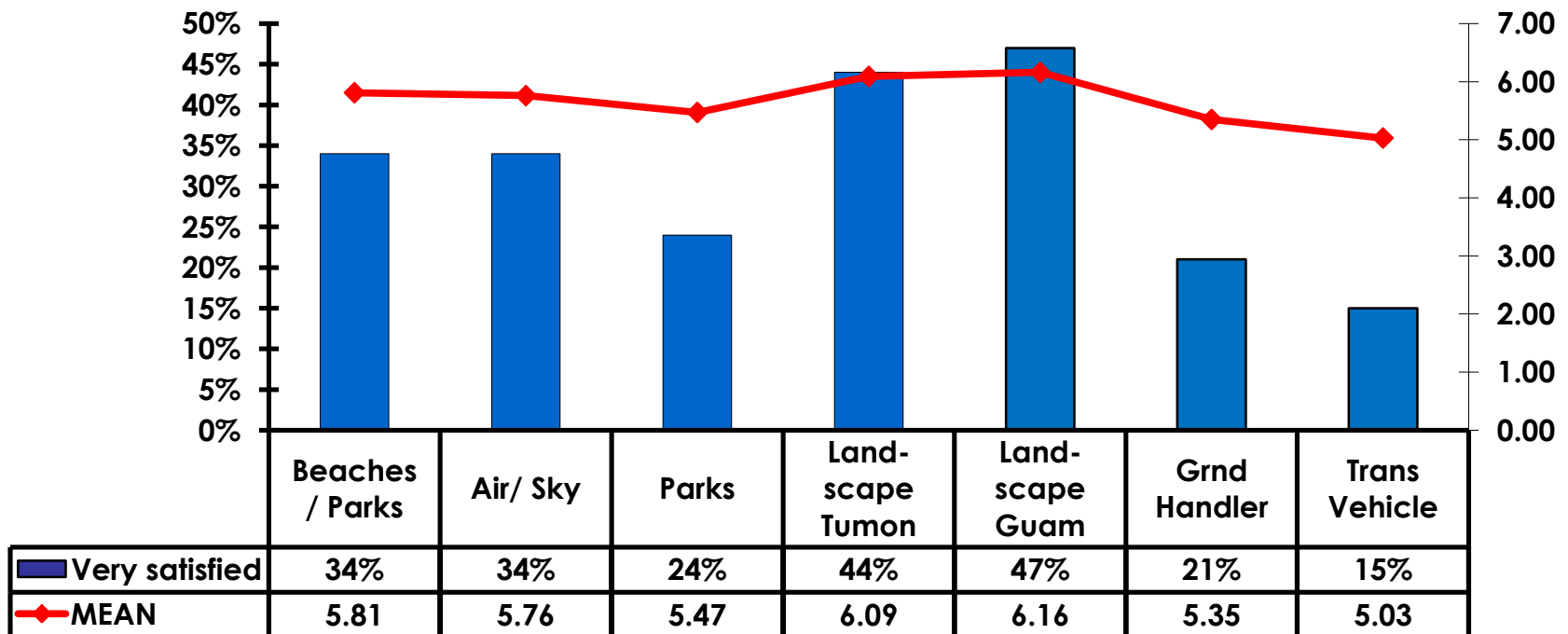
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

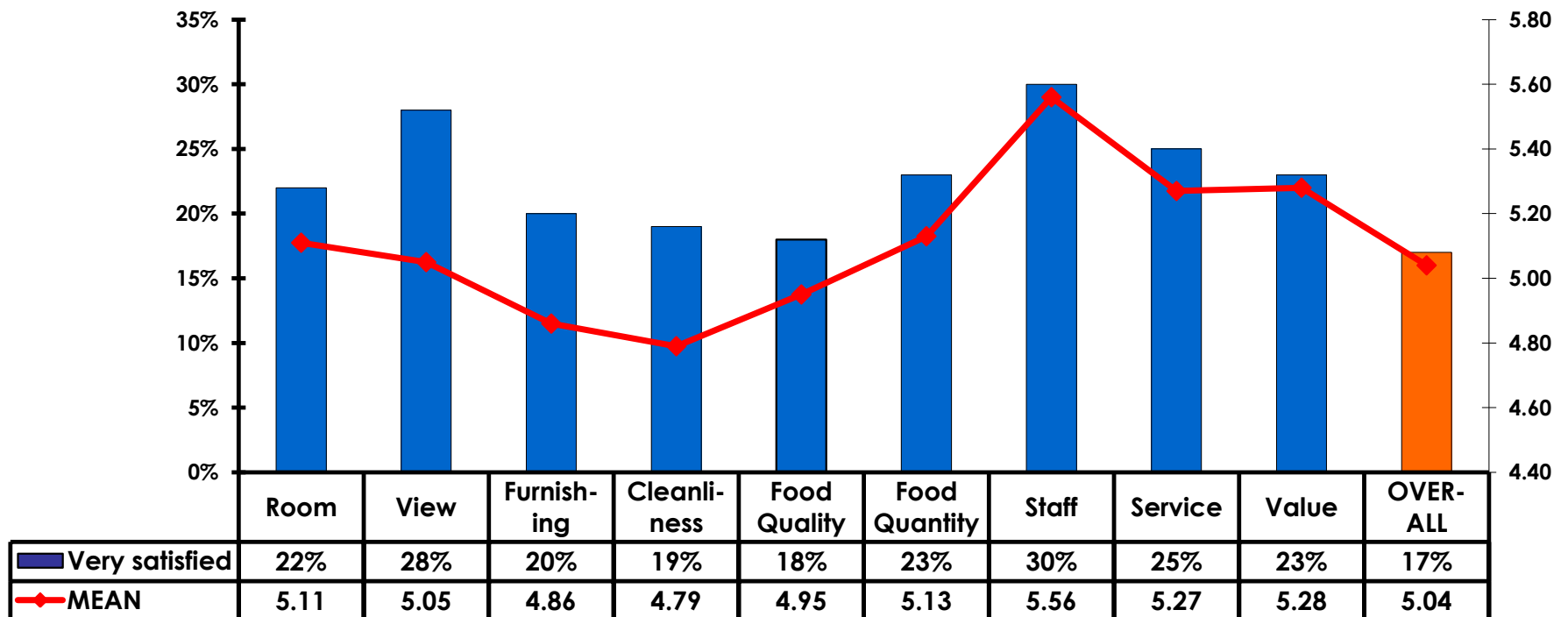
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

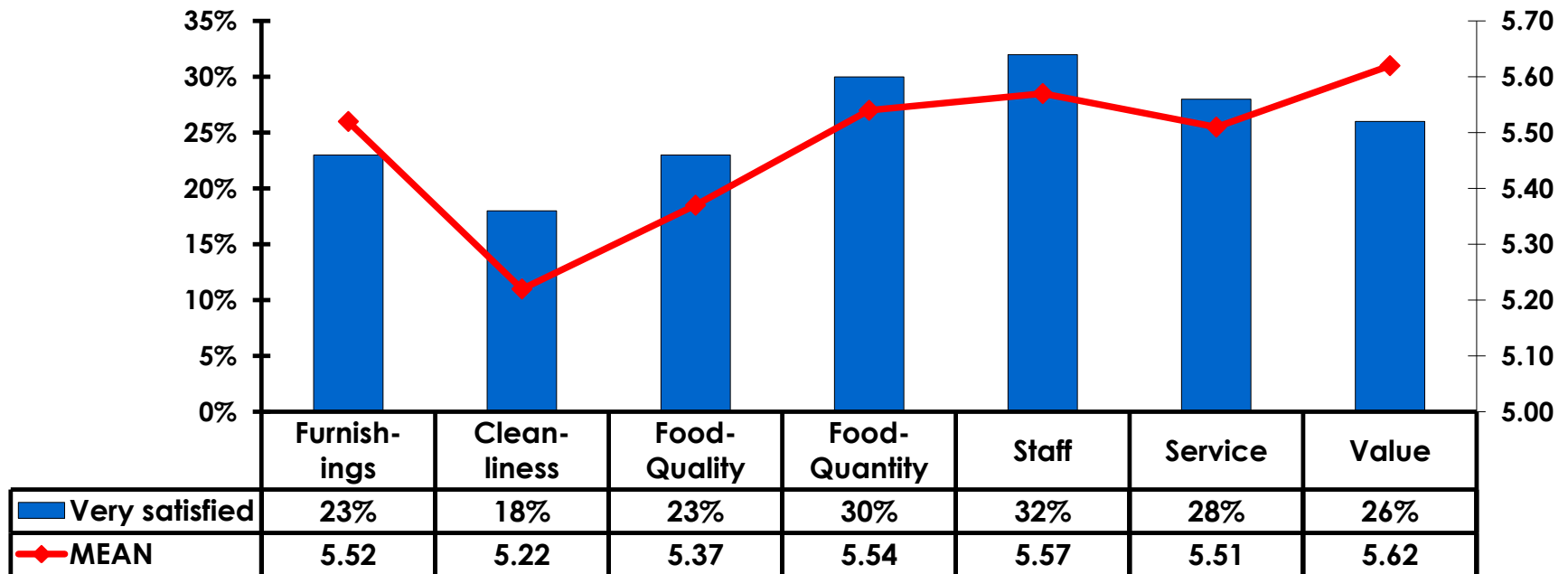
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

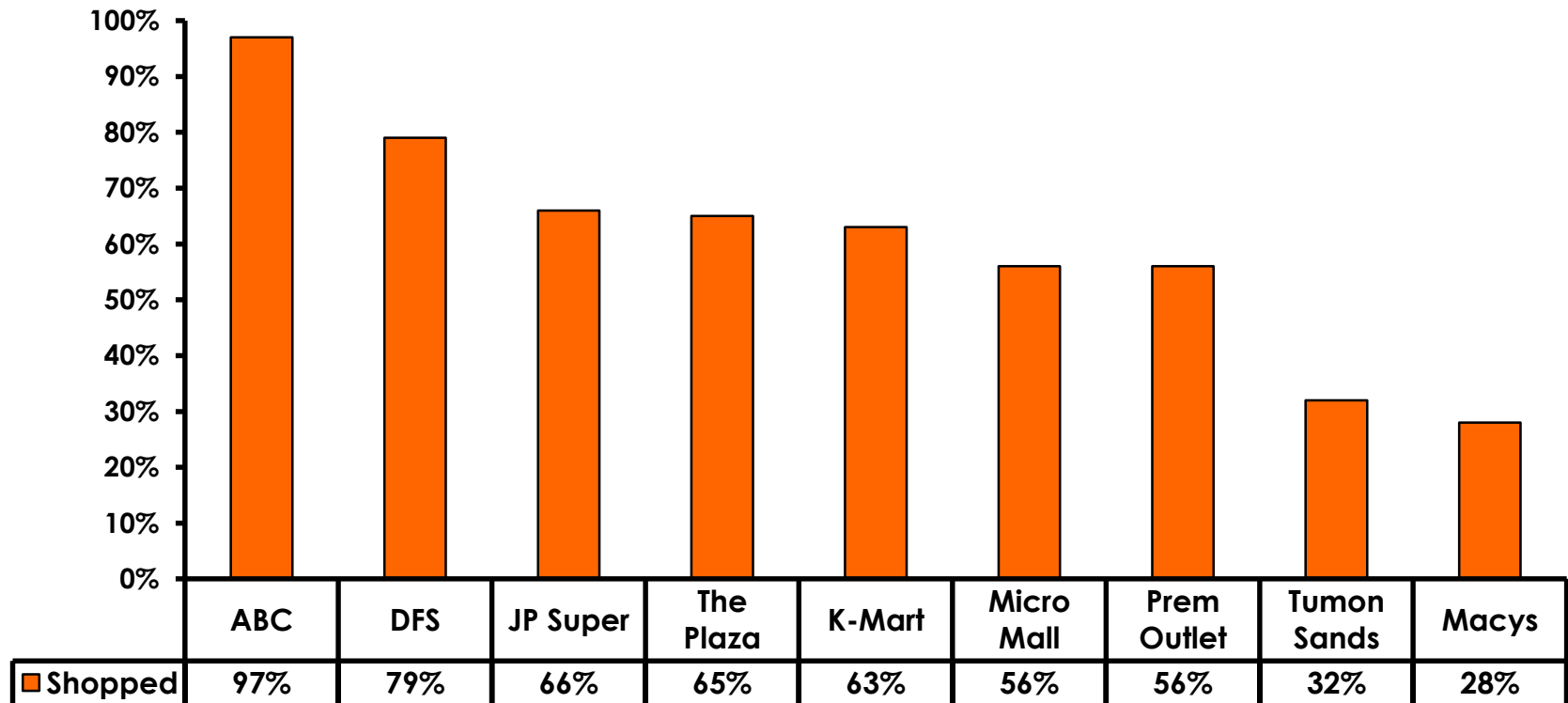
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



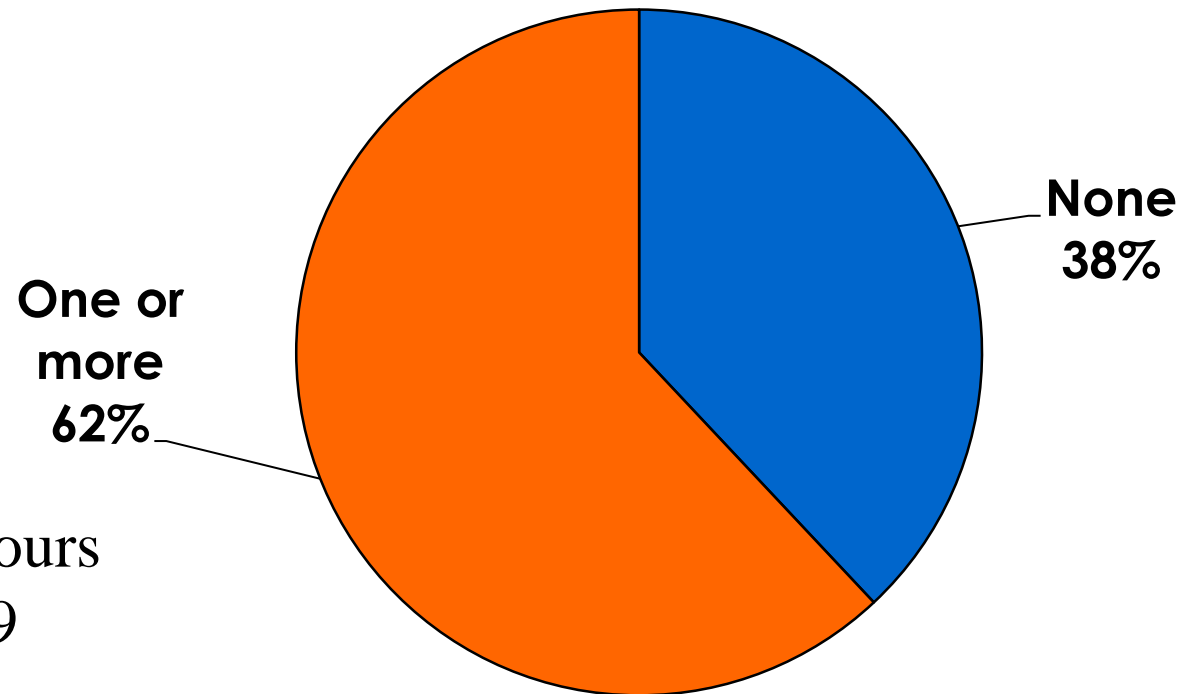
Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 54%	Score of 6 to 7 = 52%
Score of 4 to 5 = 40%	Score of 4 to 5 = 43%
Score 1 to 3 = 5%	Score 1 to 3 = 6%
MEAN = 5.45	MEAN = 5.35

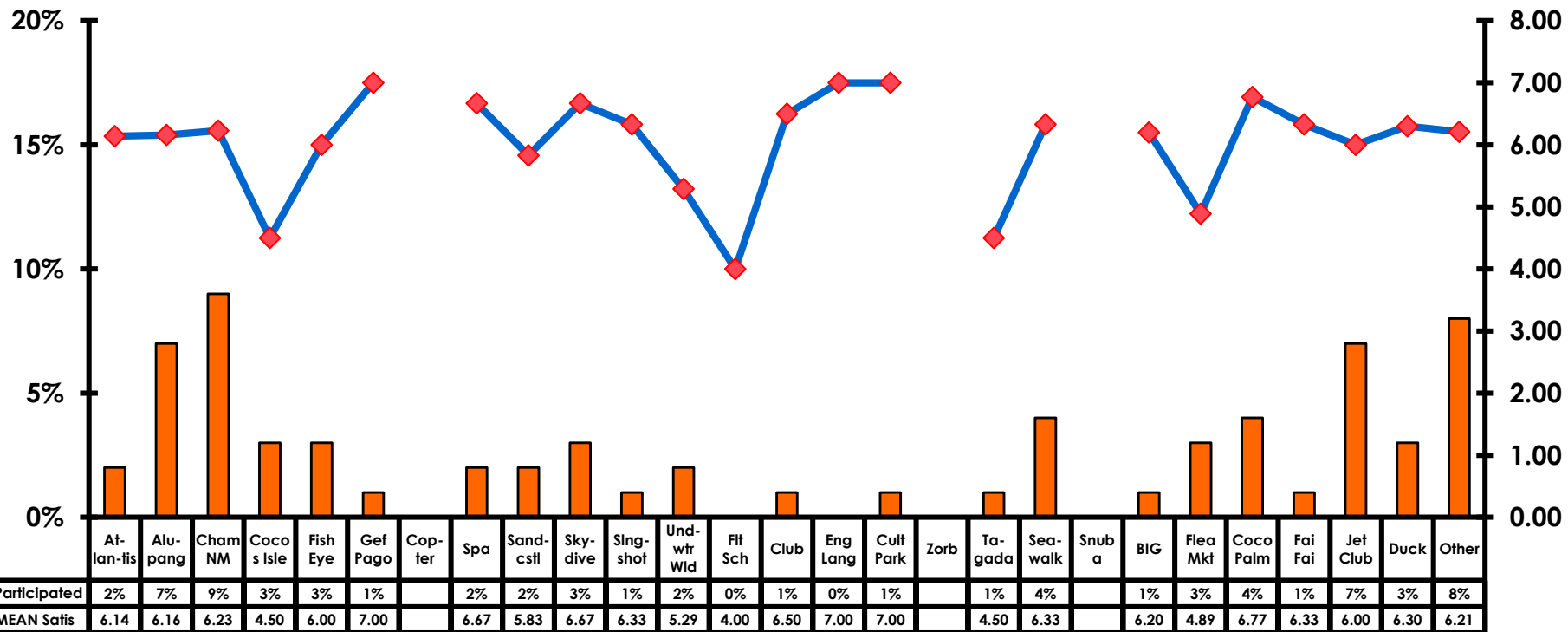
Optional Tour Participation



- Average number of tours participated in is 1.19

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 = 58%	Score of 6 to 7 = 55%
Score of 4 to 5 = 40%	Score of 4 to 5 = 42%
Score 1 to 3 = 2%	Score 1 to 3 = 3%
MEAN = 5.49	MEAN = 5.43

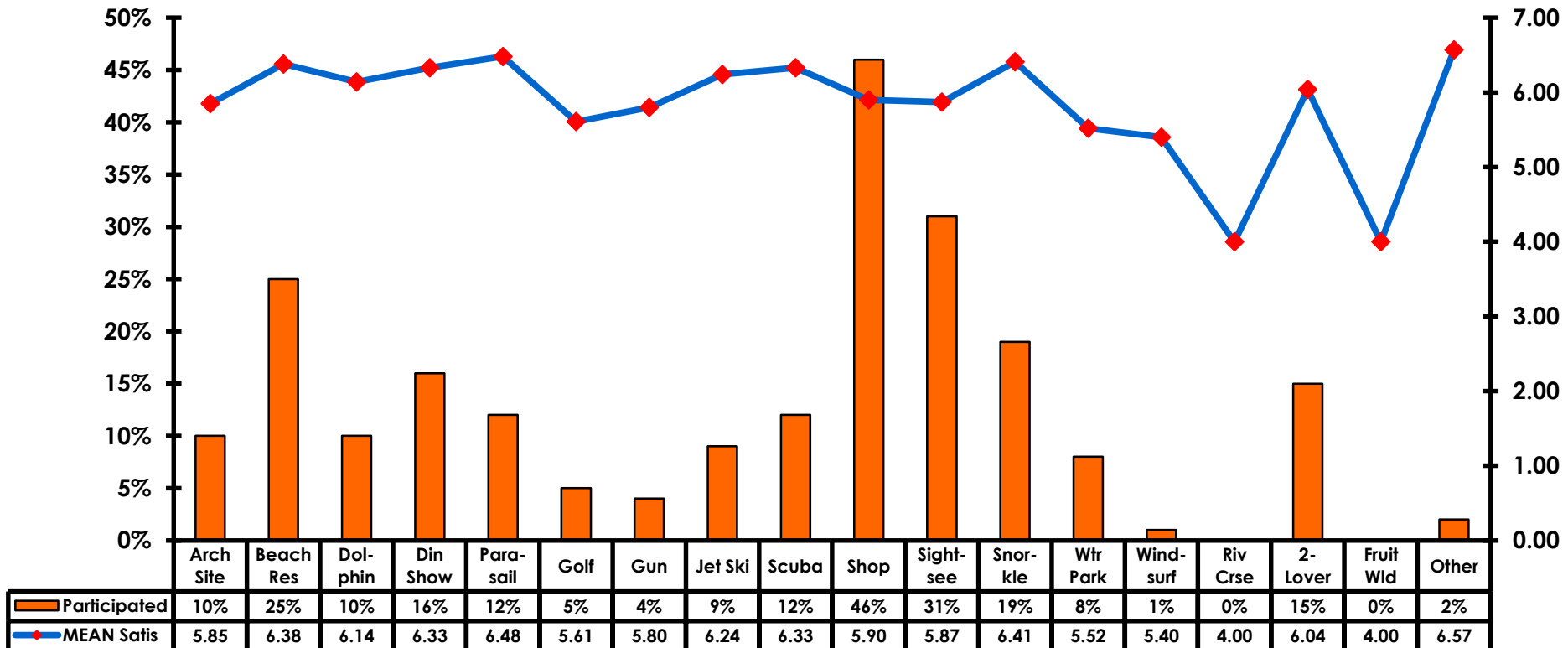
Night Tours Satisfaction

7pt Rating Scale

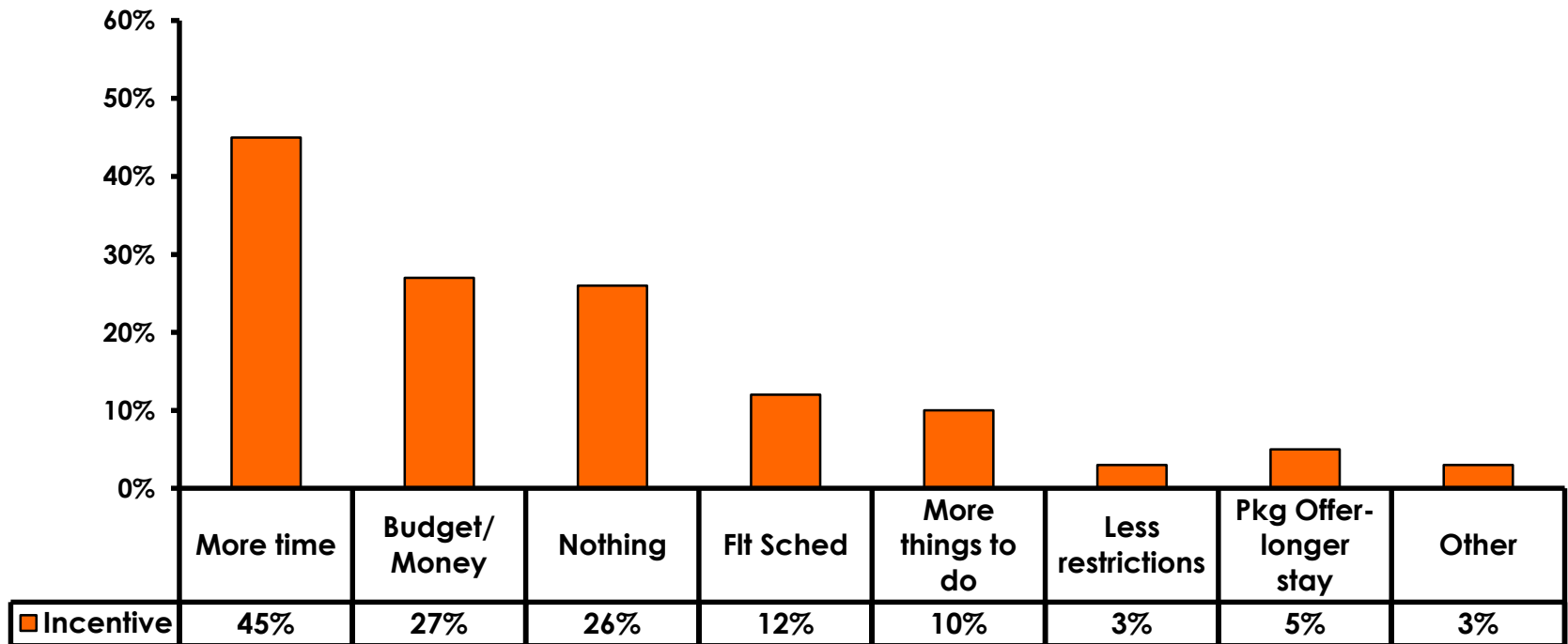
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 33%	Score of 6 to 7 = 34%
Score of 4 to 5 = 66%	Score of 4 to 5 = 63%
Score 1 to 3 = 2%	Score 1 to 3 = 2%
MEAN = 4.91	MEAN = 4.90

Satisfaction with Other Activities



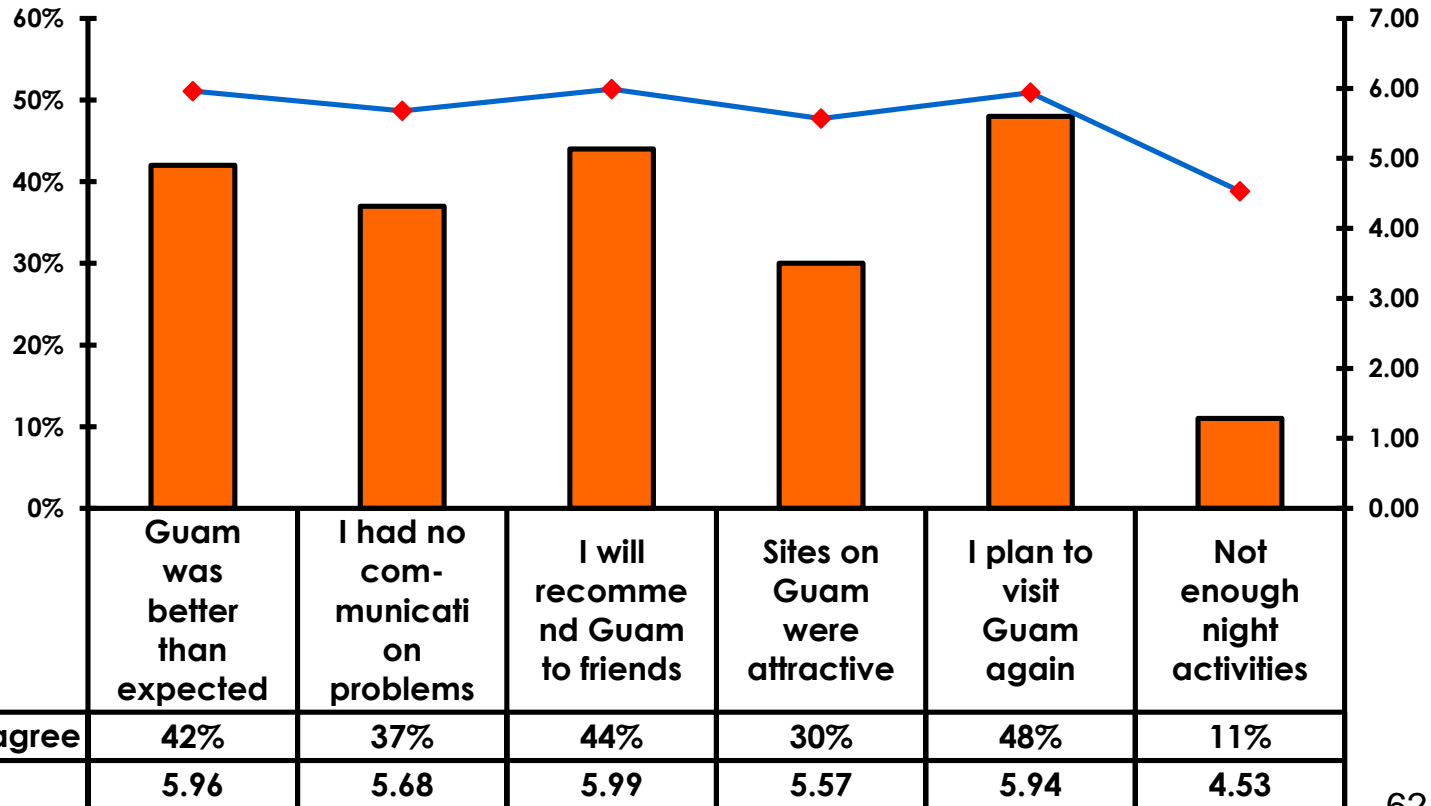
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

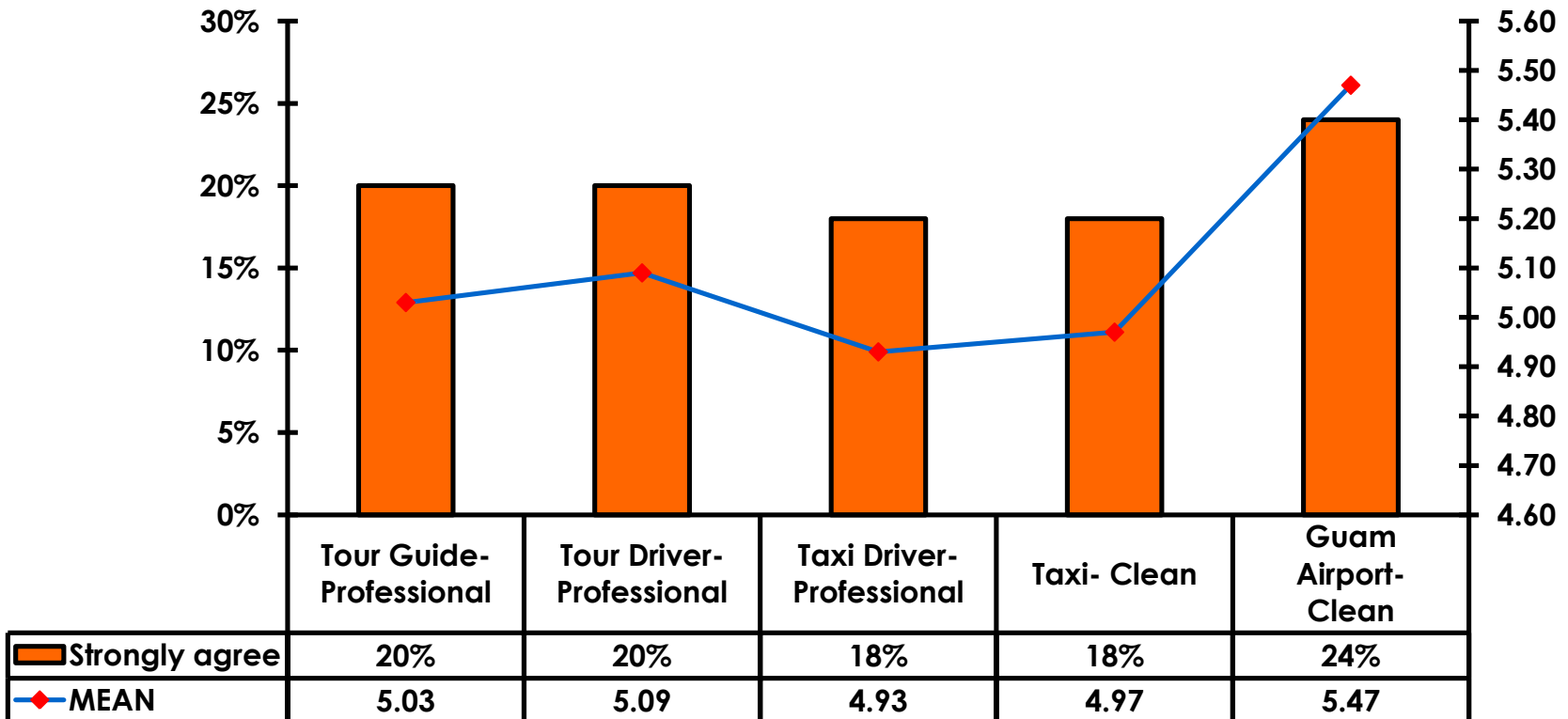
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

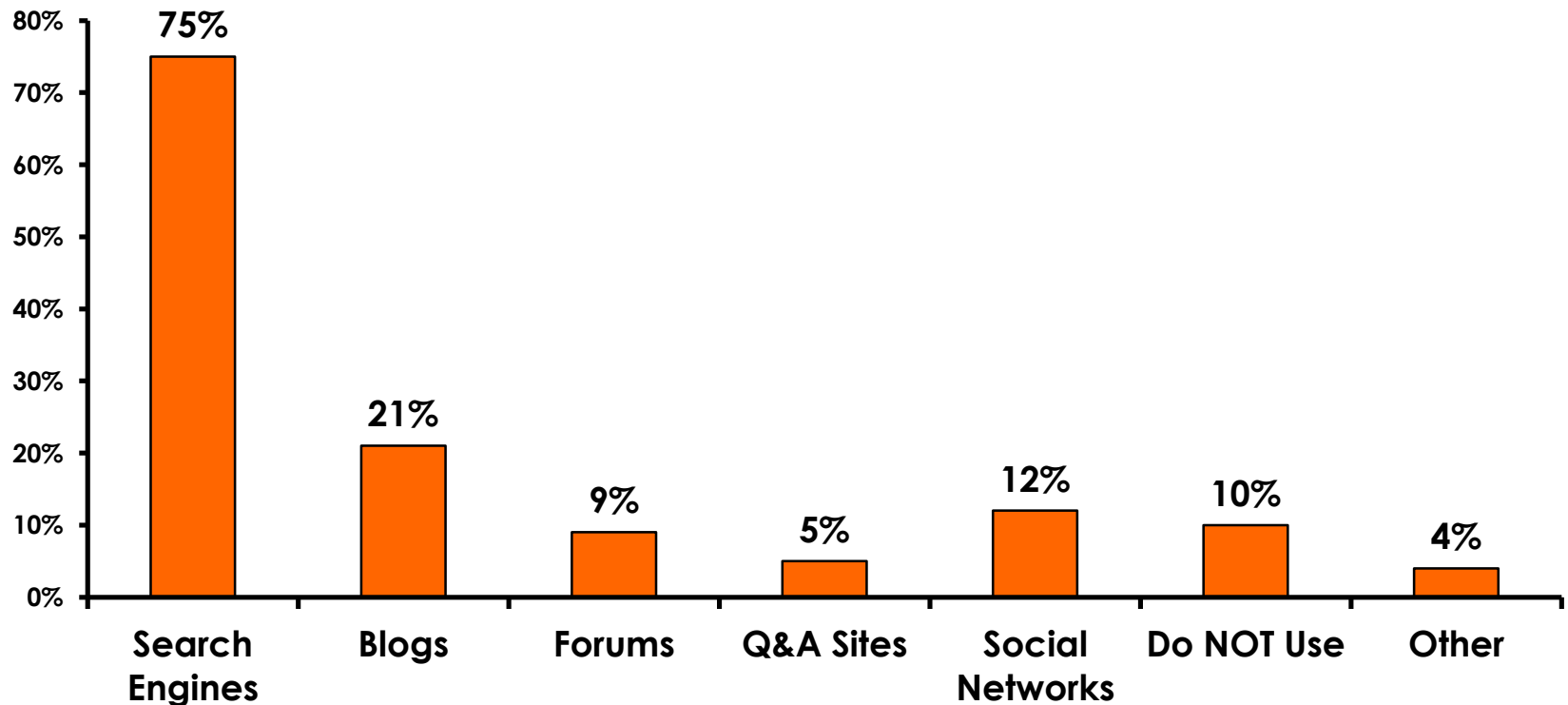
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



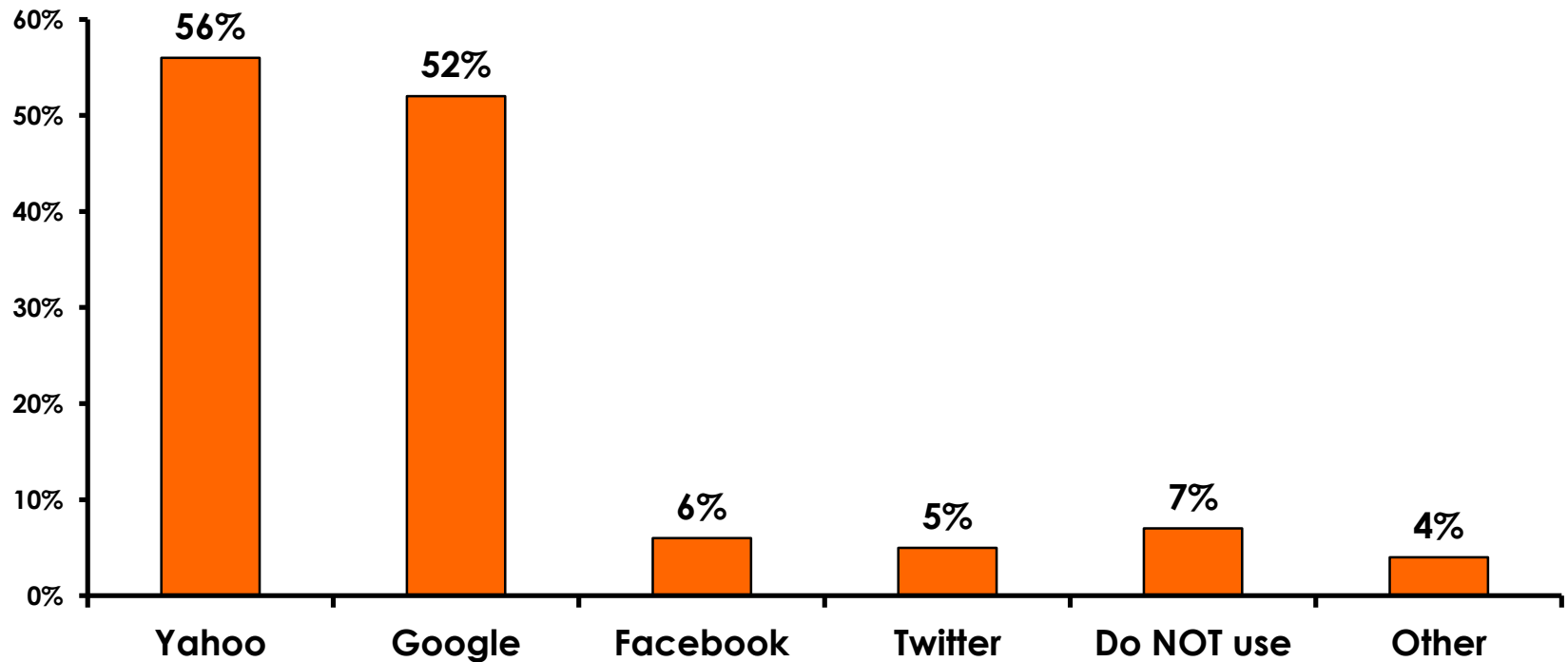
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

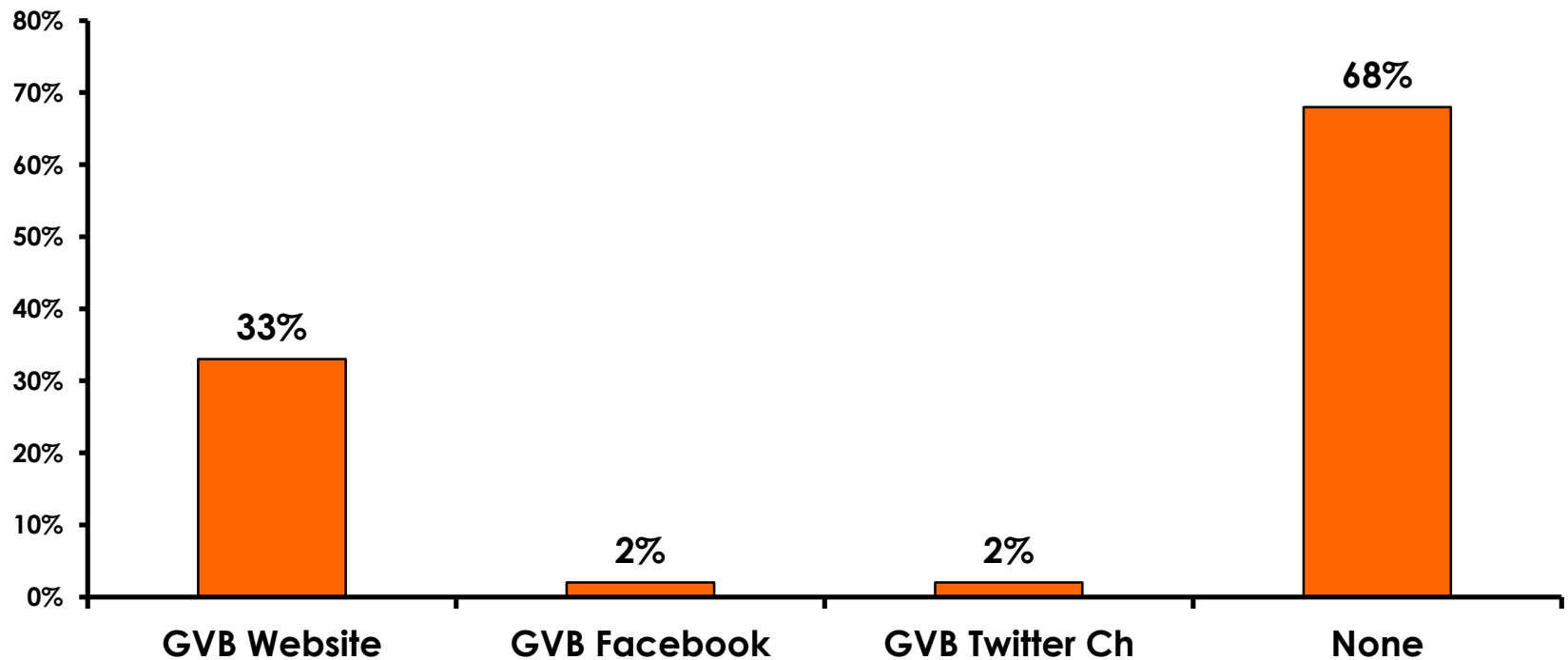


Internet- Things To Do

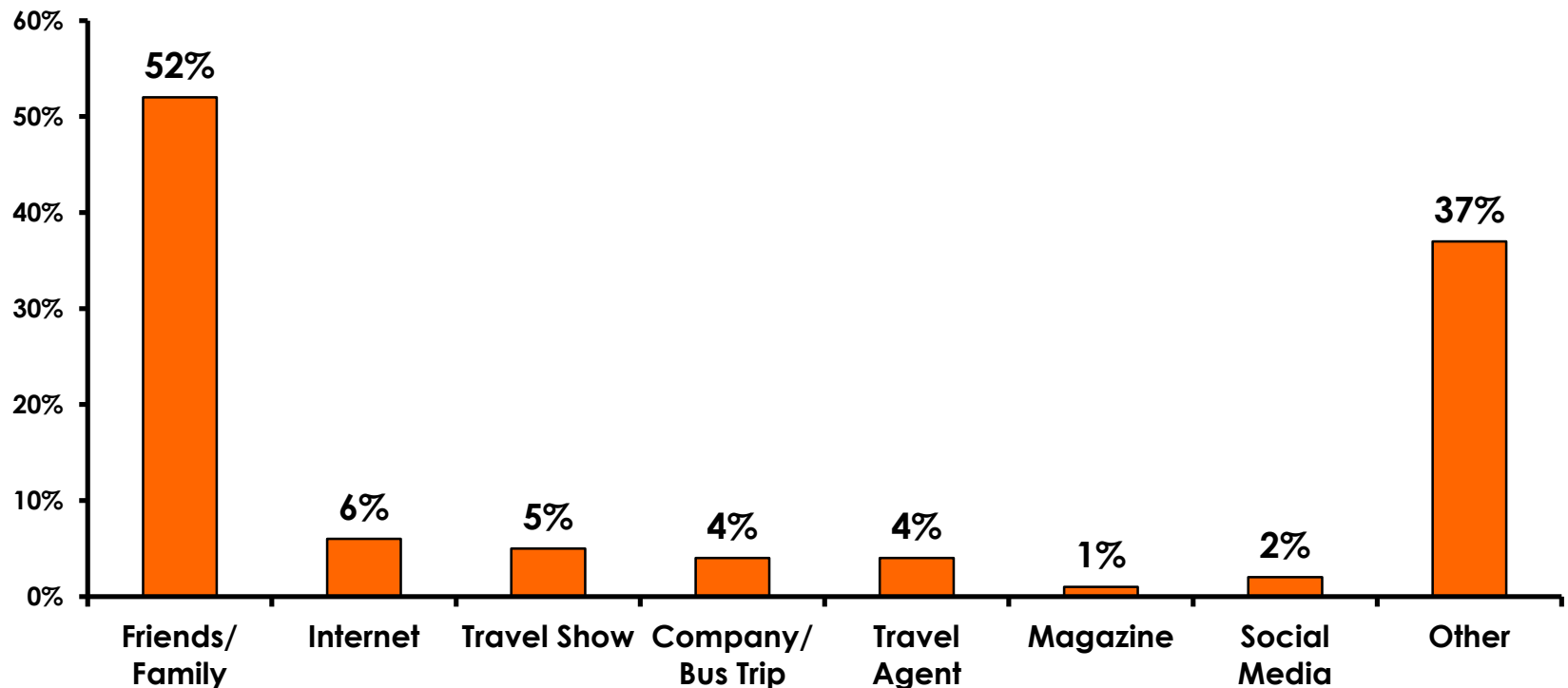
Sources of Info



Internet- GVB Sources

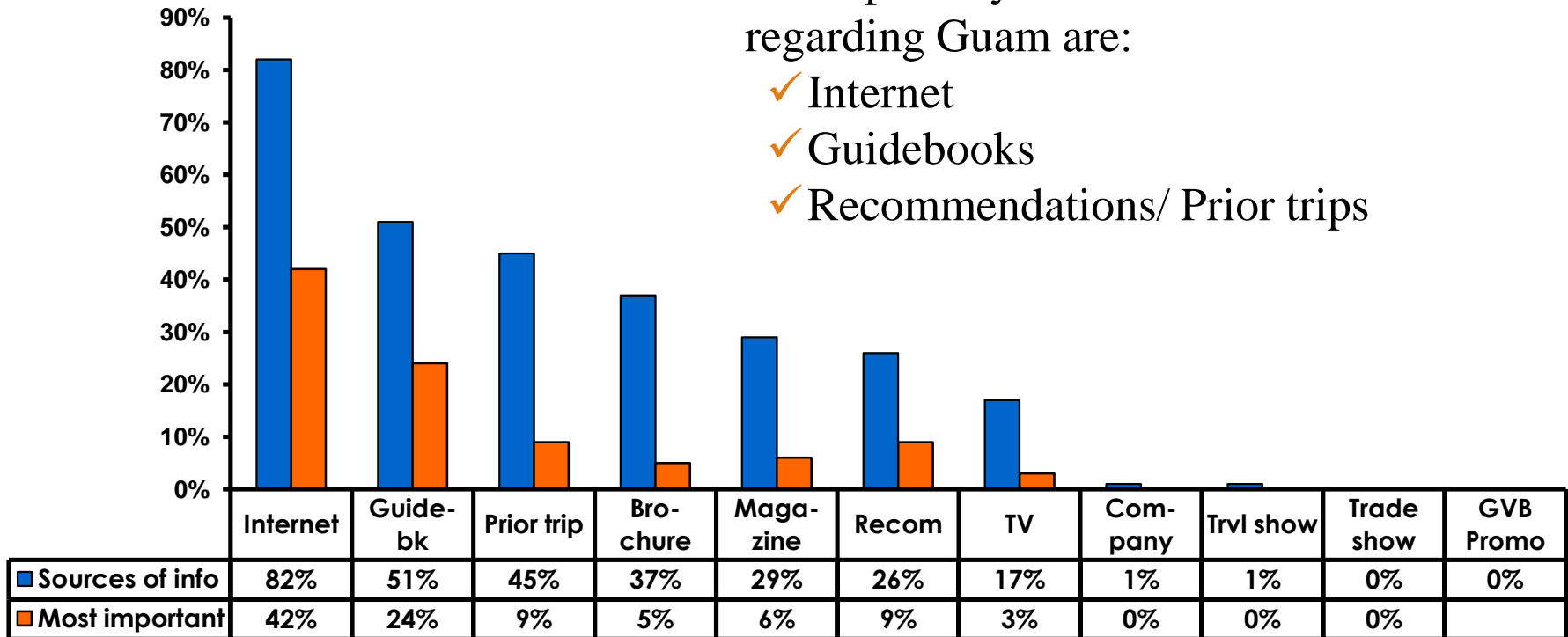


Travel Motivation- Info Sources



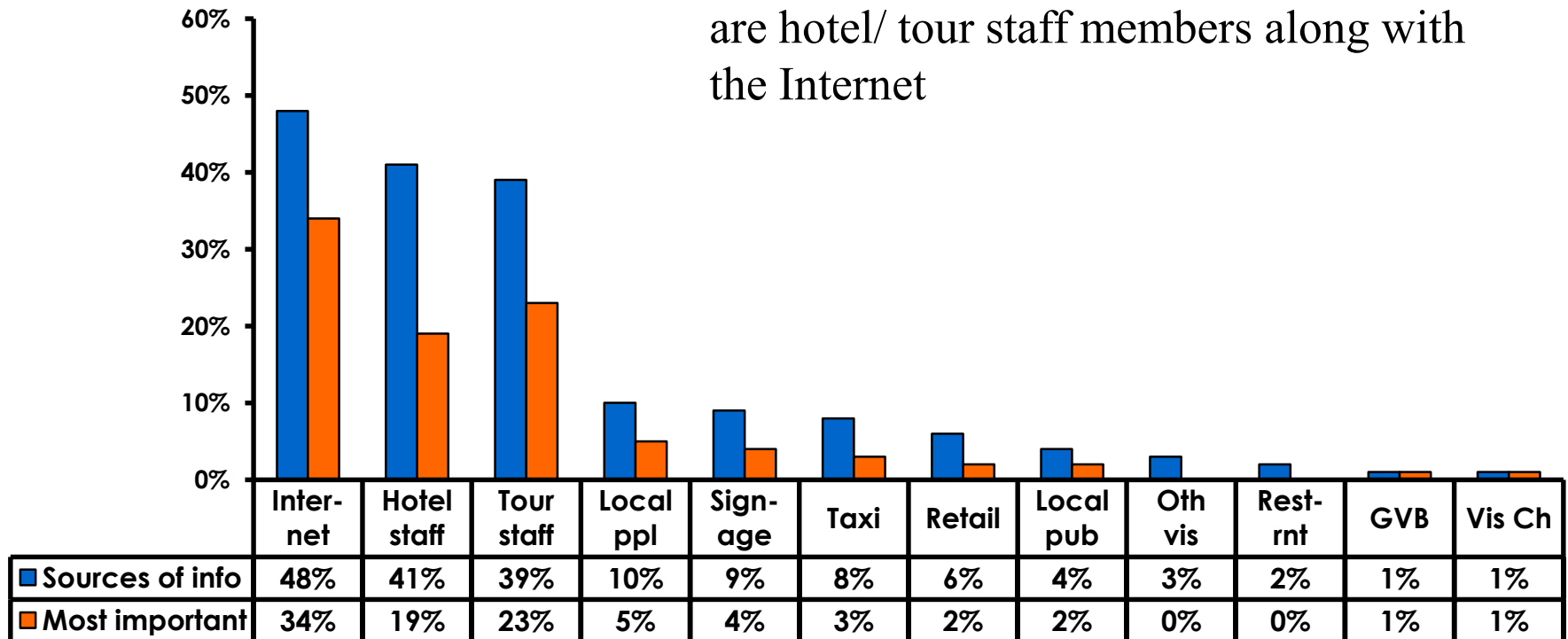
Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
 - ✓ Internet
 - ✓ Guidebooks
 - ✓ Recommendations/ Prior trips



Sources of Information Post-arrival

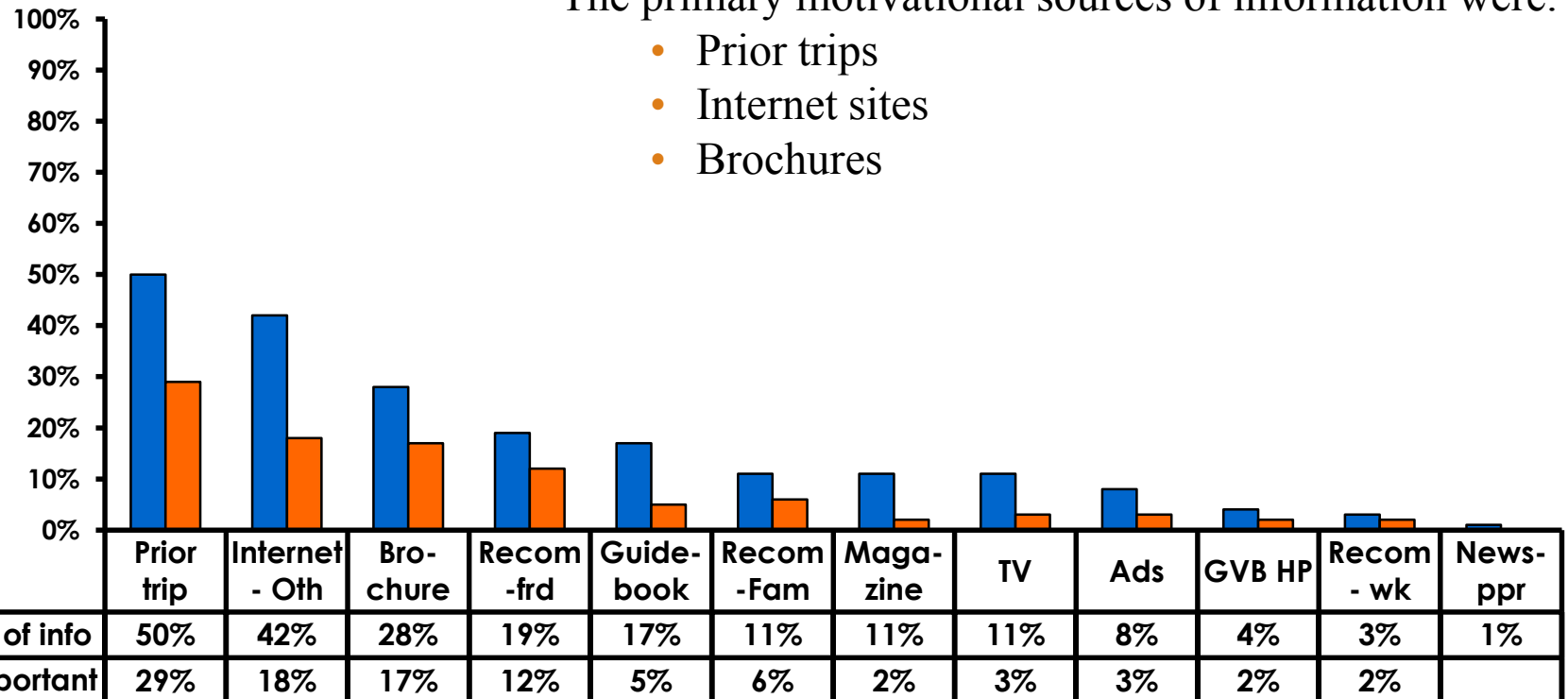
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

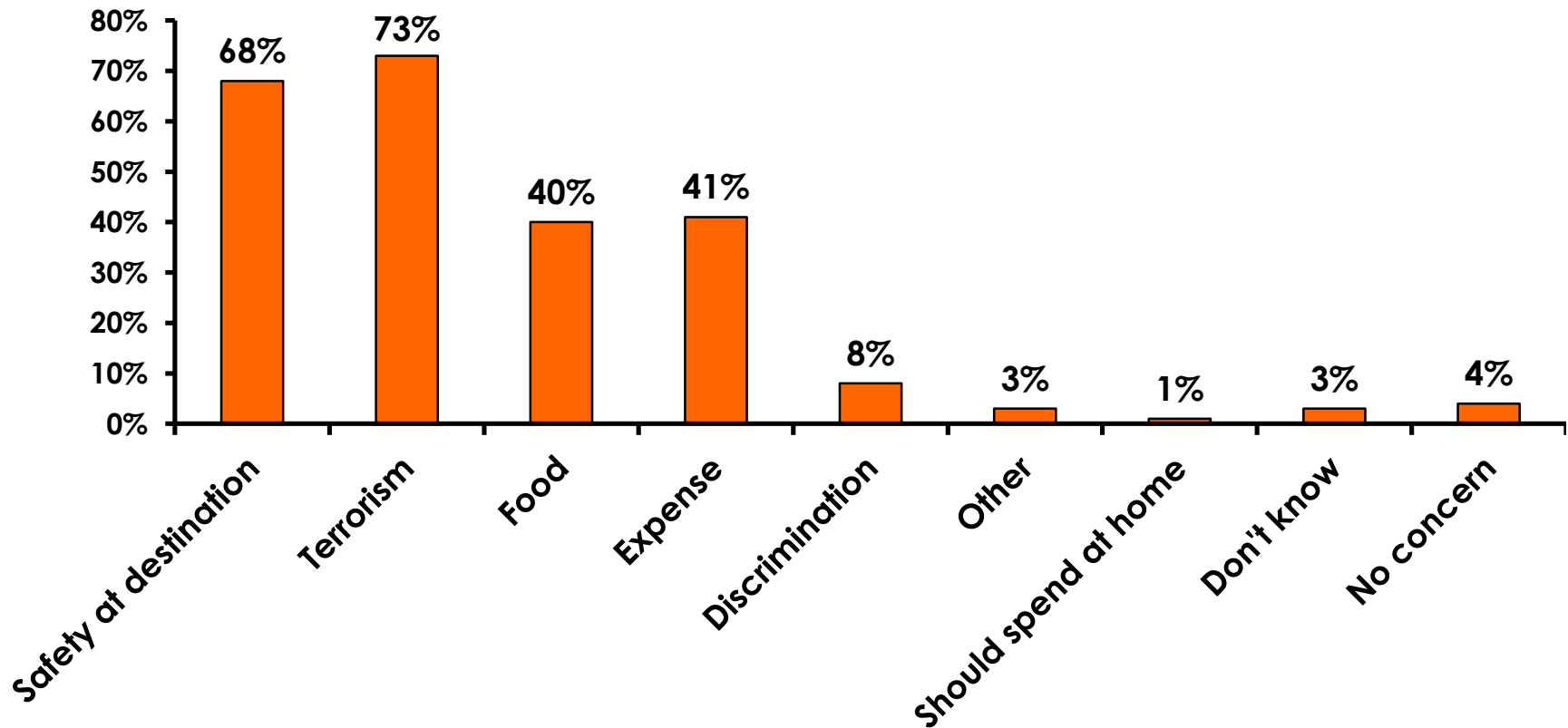
The primary motivational sources of information were.

- Prior trips
- Internet sites
- Brochures



SECTION 6 **OTHER ISSUES**

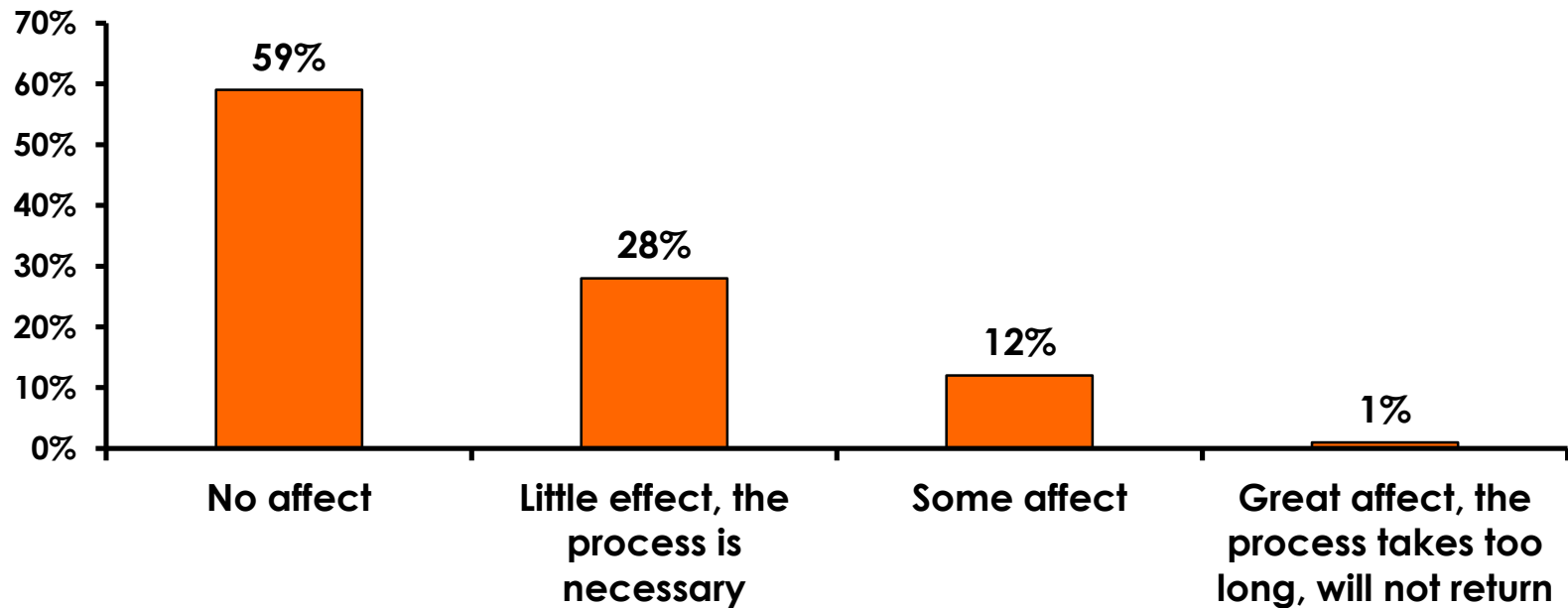
Concerns about travel outside of Japan - Overall



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	73%	72%	68%	74%	78%	73%	66%	88%	67%	80%	70%	69%	60%	
	Safety	68%	72%	73%	64%	65%	45%	66%	84%	74%	64%	72%	72%	70%	
	Expense	41%	43%	43%	44%	24%	9%	48%	50%	51%	39%	46%	33%	40%	
	Food	40%	38%	44%	41%	35%	18%	28%	44%	46%	43%	42%	43%	30%	
	Discrimination against Japanese	8%	12%	7%	8%	4%		21%	13%	8%	3%	6%	13%		
	No concerns	4%	1%	6%	7%		27%	3%		8%	5%	4%	4%		
	Other	3%	8%	2%	1%				6%		3%	4%	1%		
	Don't know	3%	3%	3%	2%	2%		3%			2%				
	Should spend at home	1%		1%	1%	2%				3%		2%	1%		
	Total	Count	348	76	88	138	46	11	29	32	39	61	50	67	10

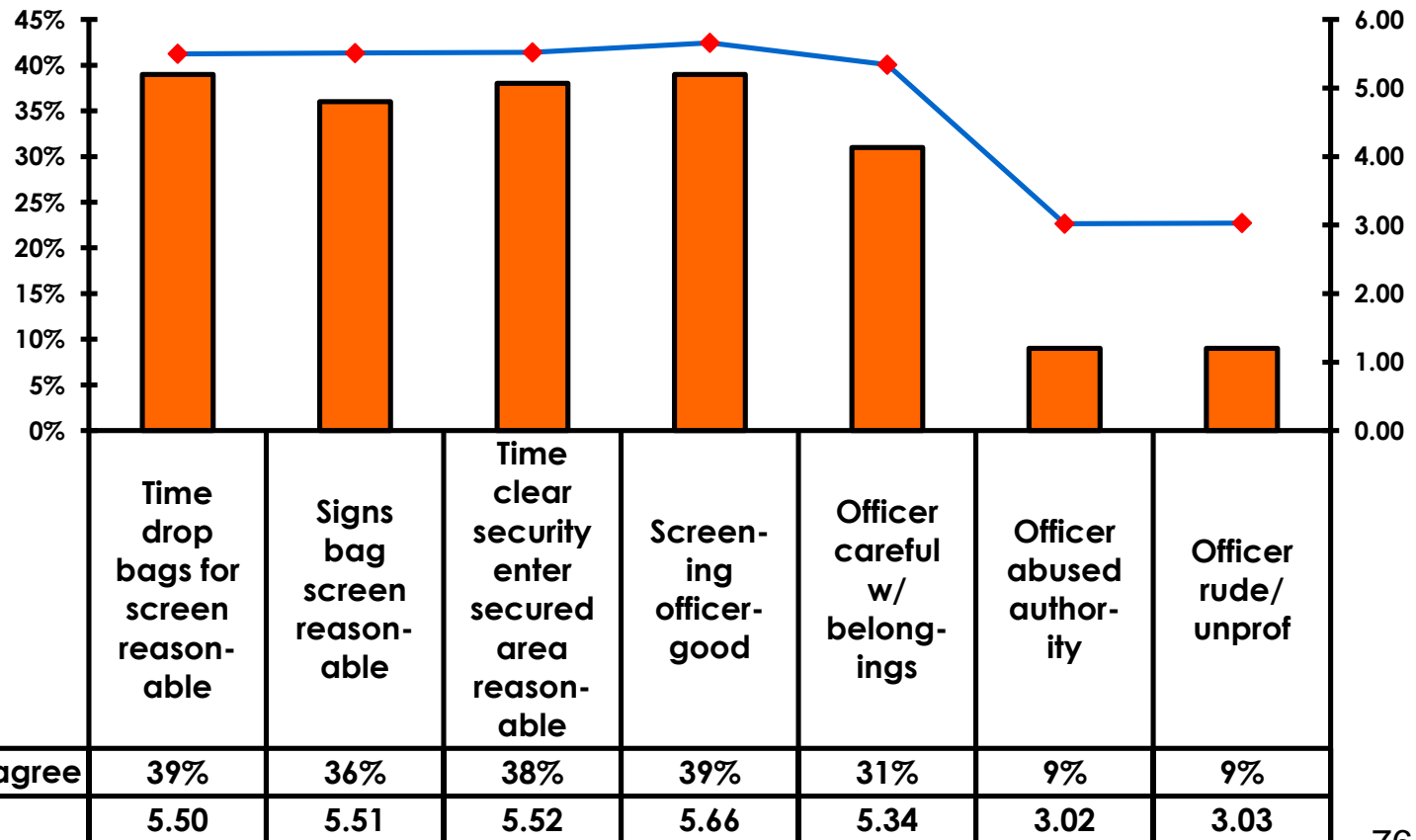
Security Screening/ Immigration Process at Guam International Airport



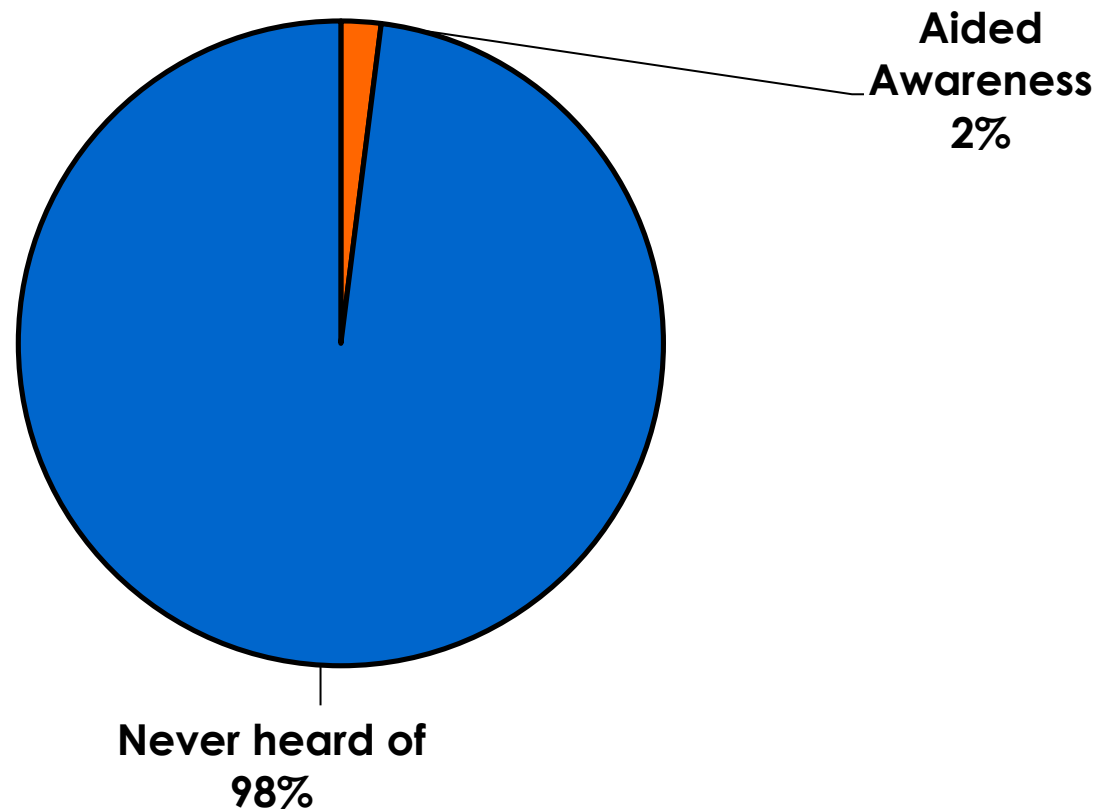
Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



Shop Guam Festival



Shop Guam Festival - Impact

n=6

