



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2016

SEPTEMBER 2016



Prepared by: QMark Research

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Background & Methodology

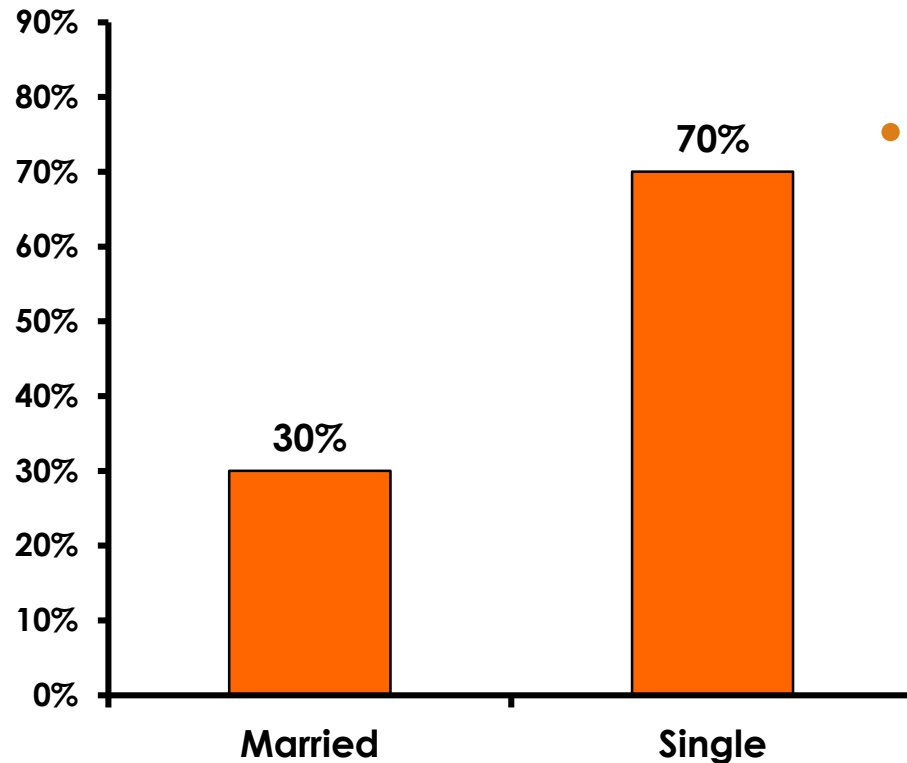
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **351** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.23 percentage points.

OBJECTIVES

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

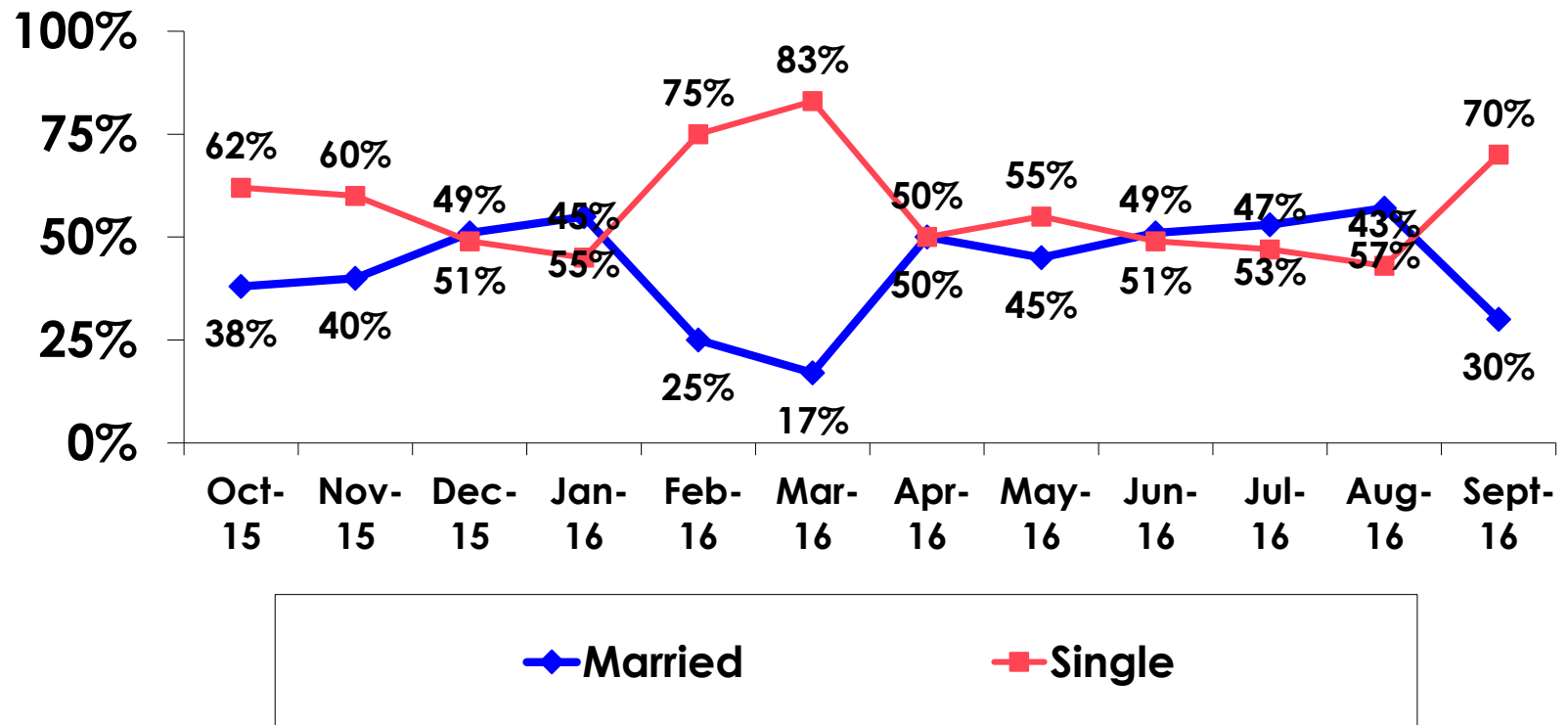
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

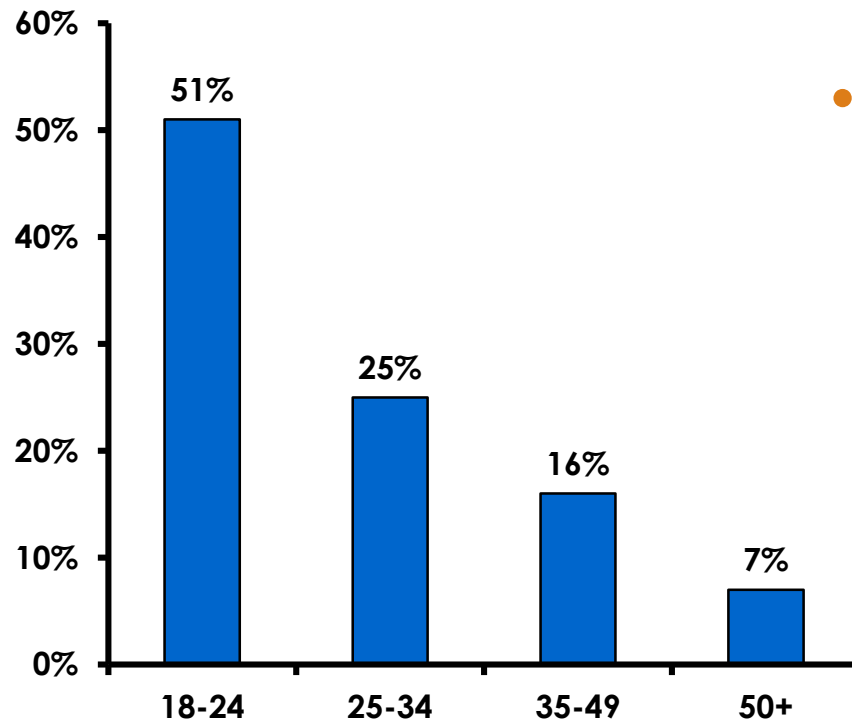


- 77% of 1st time visitors this month were single.

MARITAL STATUS

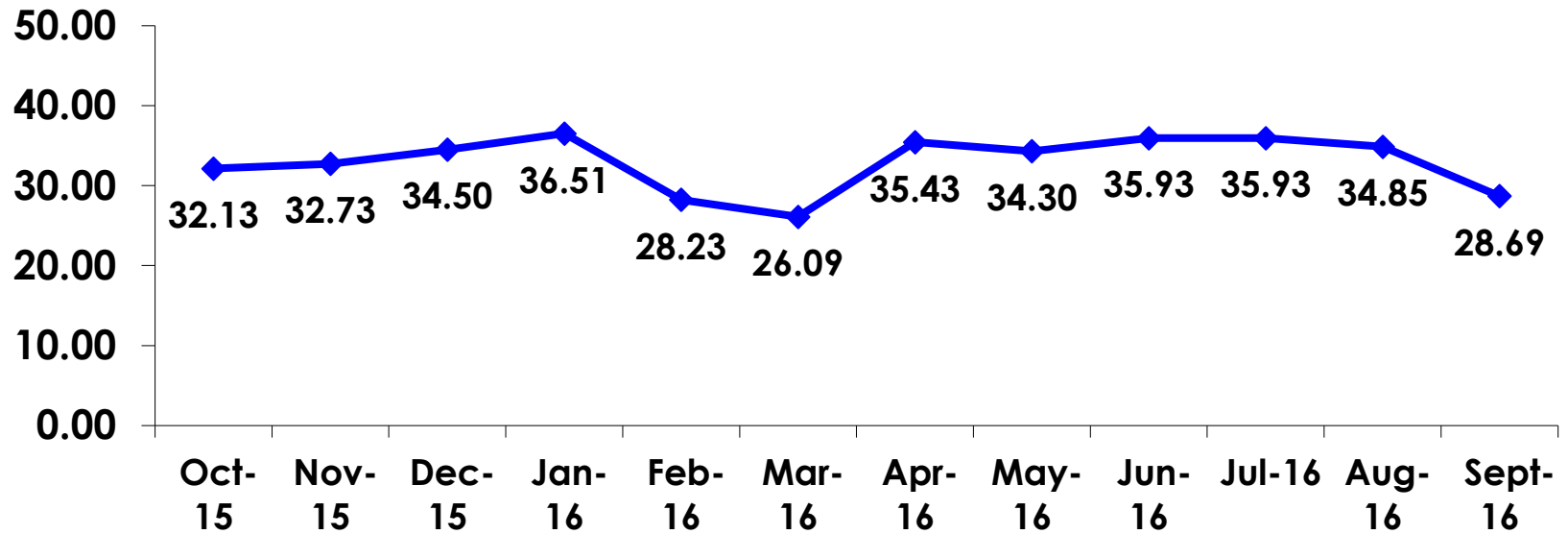


Age - Overall

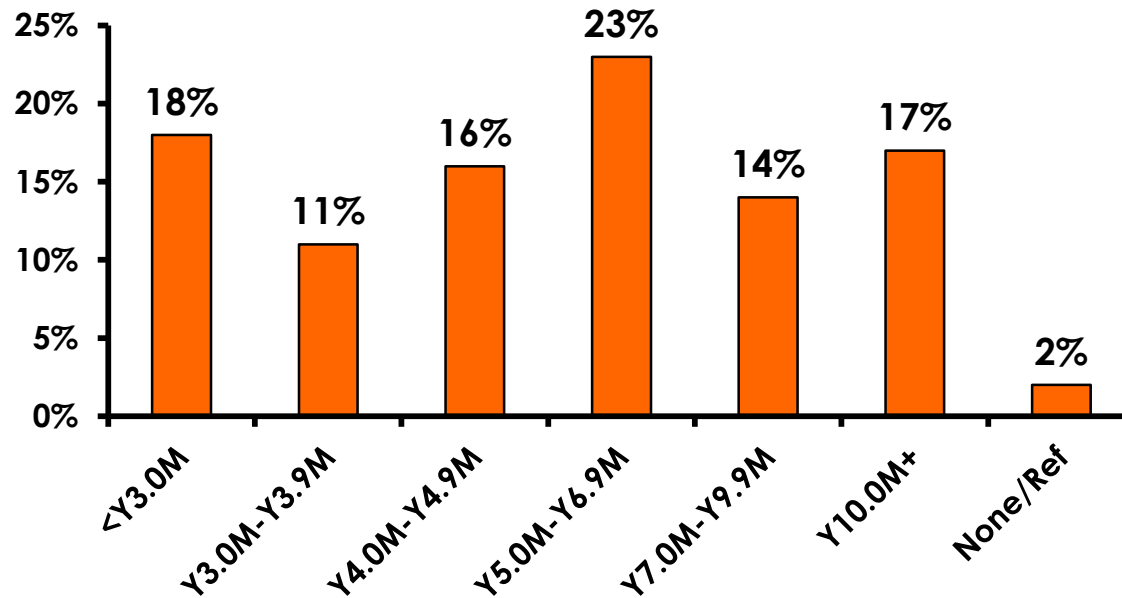


- The average age of the respondents is 28.69 years of age.

AVERAGE - AGE

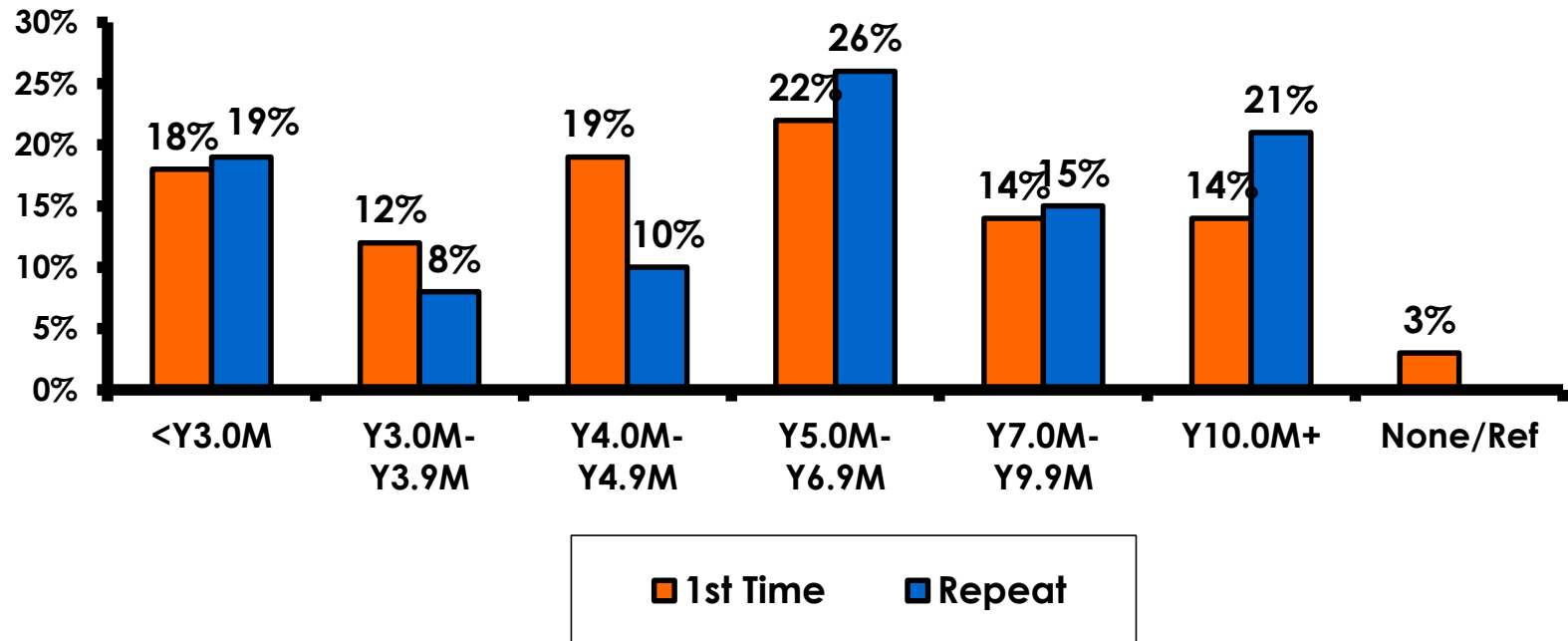


Personal Income



• ¥102.14=\$1

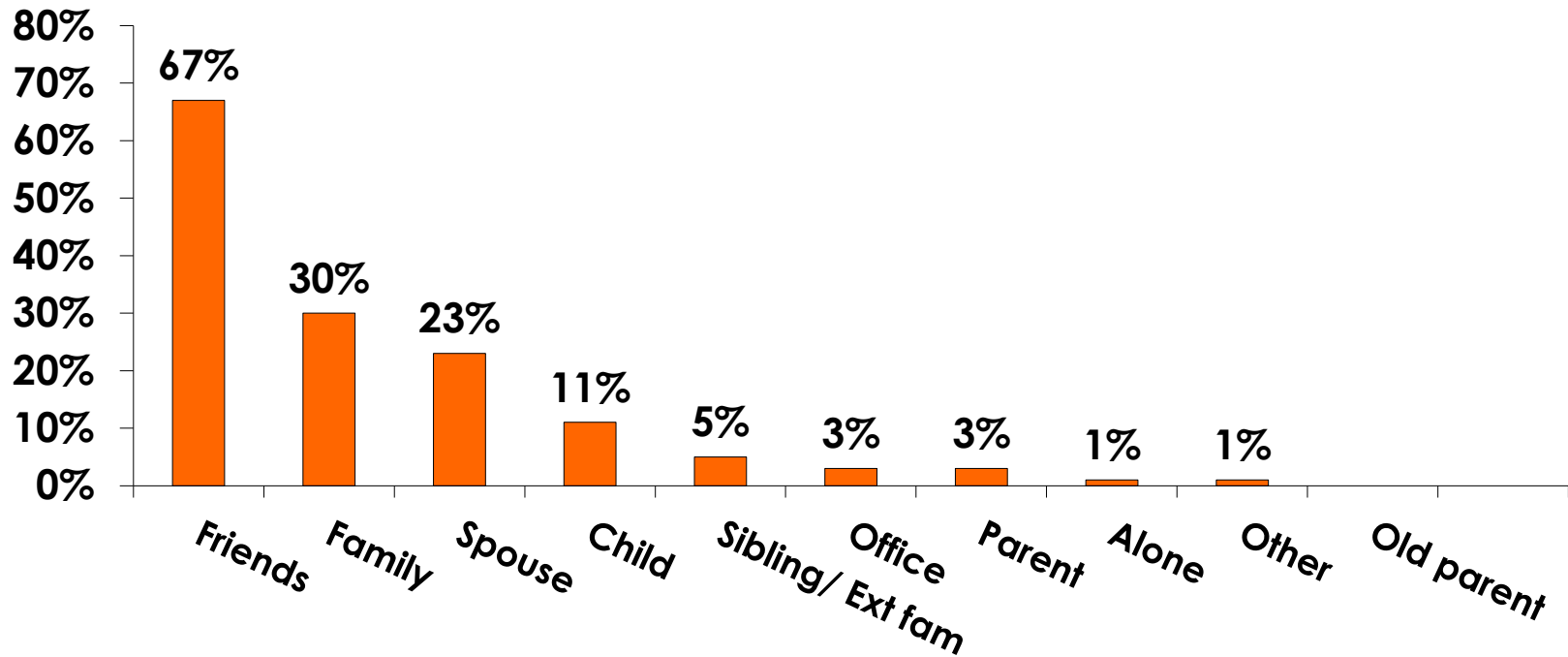
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	22	7	15	14	3	3	2
		Column N %	8%	4%	13%	12%	4%	6%	8%
Y2.0M-Y3.0M	Y2.0M-Y3.0M	Count	27	12	15	17	7	2	1
		Column N %	10%	8%	13%	15%	9%	4%	4%
Y3.0M-Y4.0M	Y3.0M-Y4.0M	Count	29	12	17	10	17	1	1
		Column N %	11%	8%	15%	9%	21%	2%	4%
Y4.0M-Y5.0M	Y4.0M-Y5.0M	Count	43	23	20	19	14	8	2
		Column N %	16%	15%	17%	16%	18%	15%	8%
Y5.0M-Y7.0M	Y5.0M-Y7.0M	Count	63	42	21	20	25	10	7
		Column N %	23%	27%	18%	17%	31%	19%	28%
Y7.0M-Y10.0M	Y7.0M-Y10.0M	Count	39	25	14	13	9	13	4
		Column N %	14%	16%	12%	11%	11%	25%	16%
Y10.0M+	Y10.0M+	Count	46	34	12	18	5	15	8
		Column N %	17%	22%	10%	16%	6%	29%	32%
No Income	No Income	Count	5	2	3	5			
		Column N %	2%	1%	3%	4%			
Total	Total	Count	274	157	117	116	80	52	25

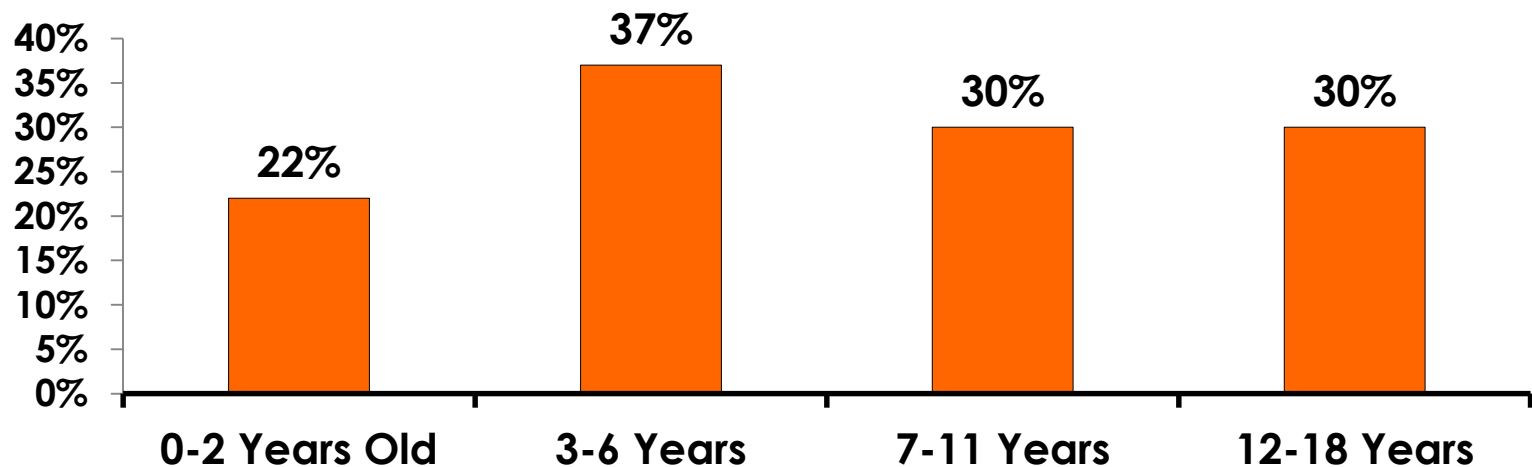
Travel Companions



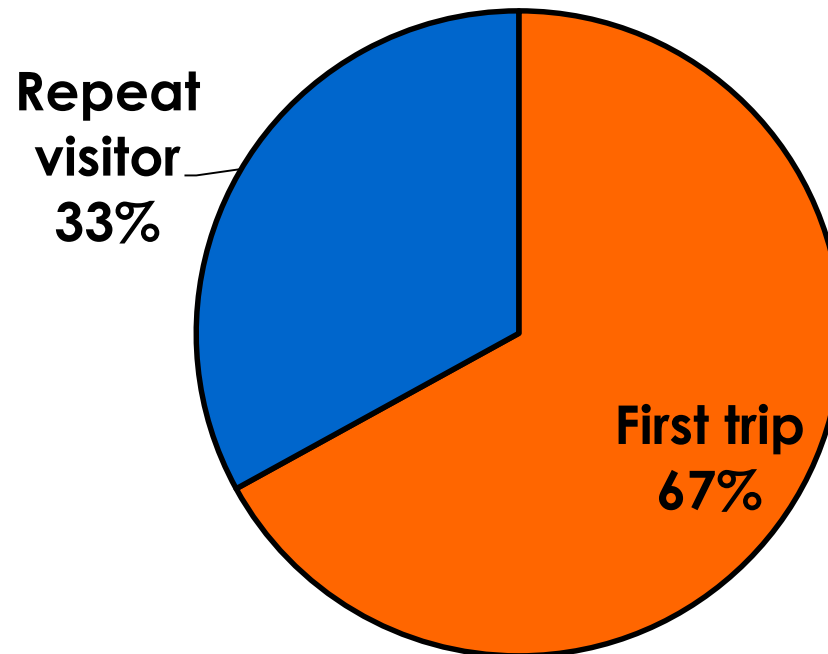
Number of Children Travel Party

N=40 total respondents traveling with children.

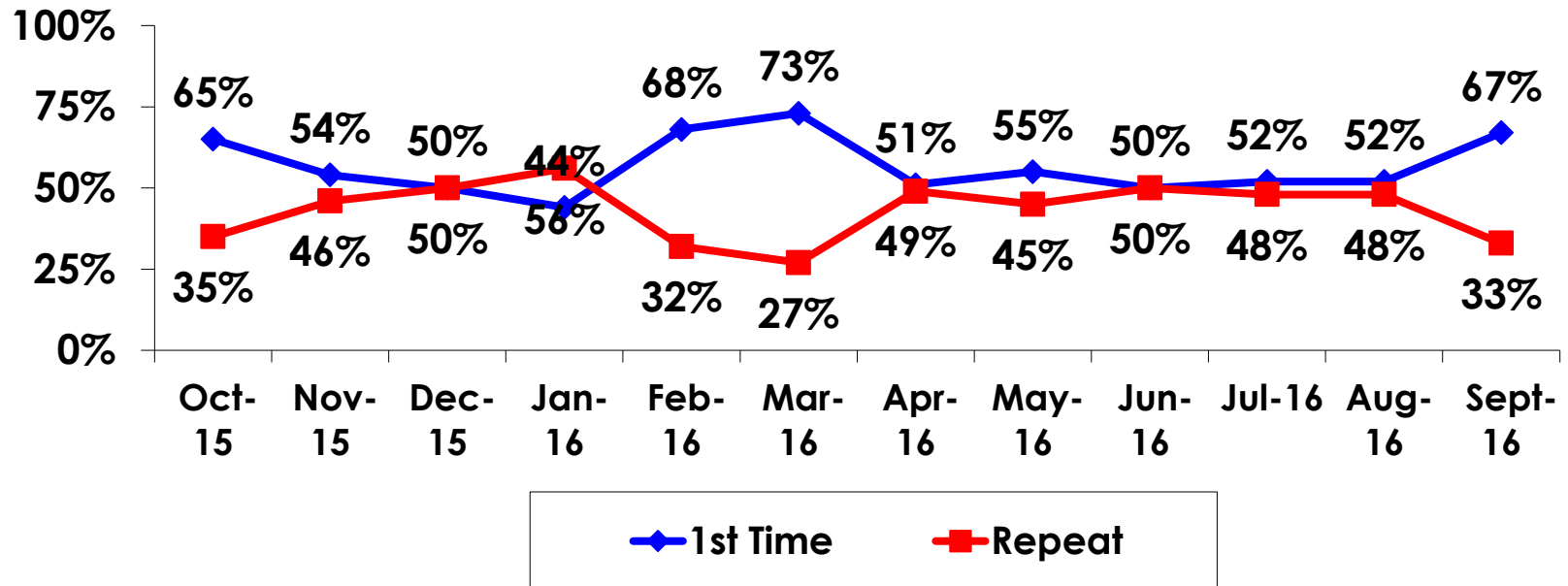
(Of those N=40 respondents, there is a total of 60 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



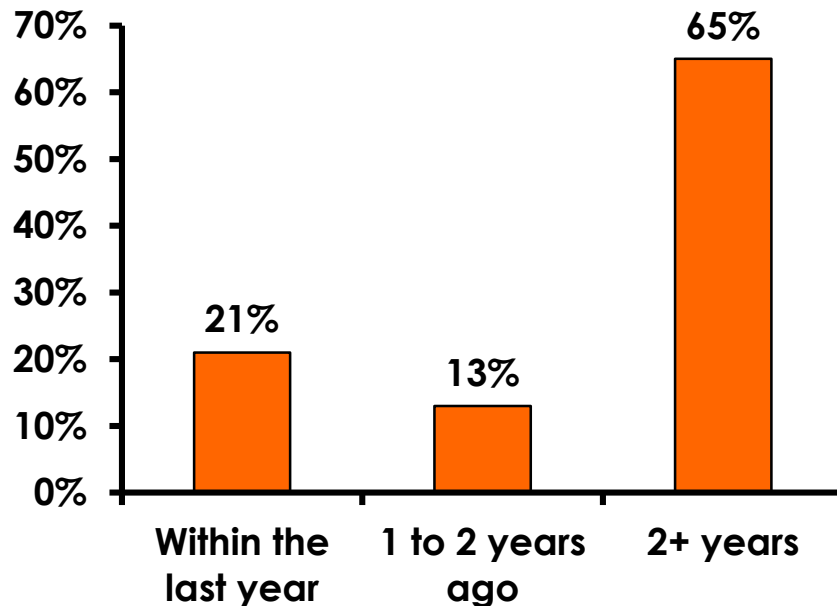
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	179	111	68	
		Column N %	51%	47%	59%	
	Female	Count	172	124	48	
		Column N %	49%	53%	41%	
	Total	Count	351	235	116	
AGE	18-24	Count	179	145	34	
		Column N %	51%	62%	29%	
	25-34	Count	88	55	33	
		Column N %	25%	24%	28%	
	35-49	Count	57	25	32	
		Column N %	16%	11%	28%	
	50+	Count	26	9	17	
		Column N %	7%	4%	15%	
		Total	Count	350	234	116

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

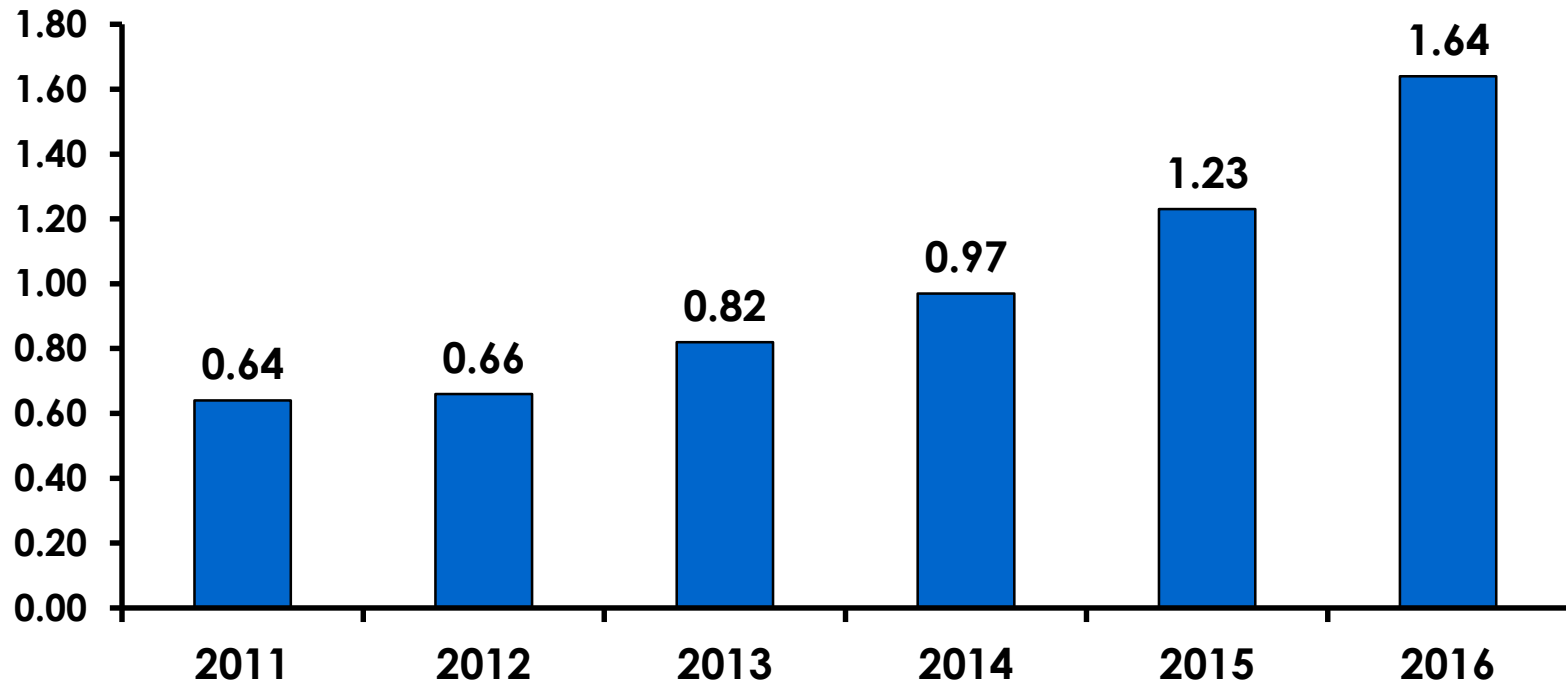
Repeat Visitors Last Trip

n = 112



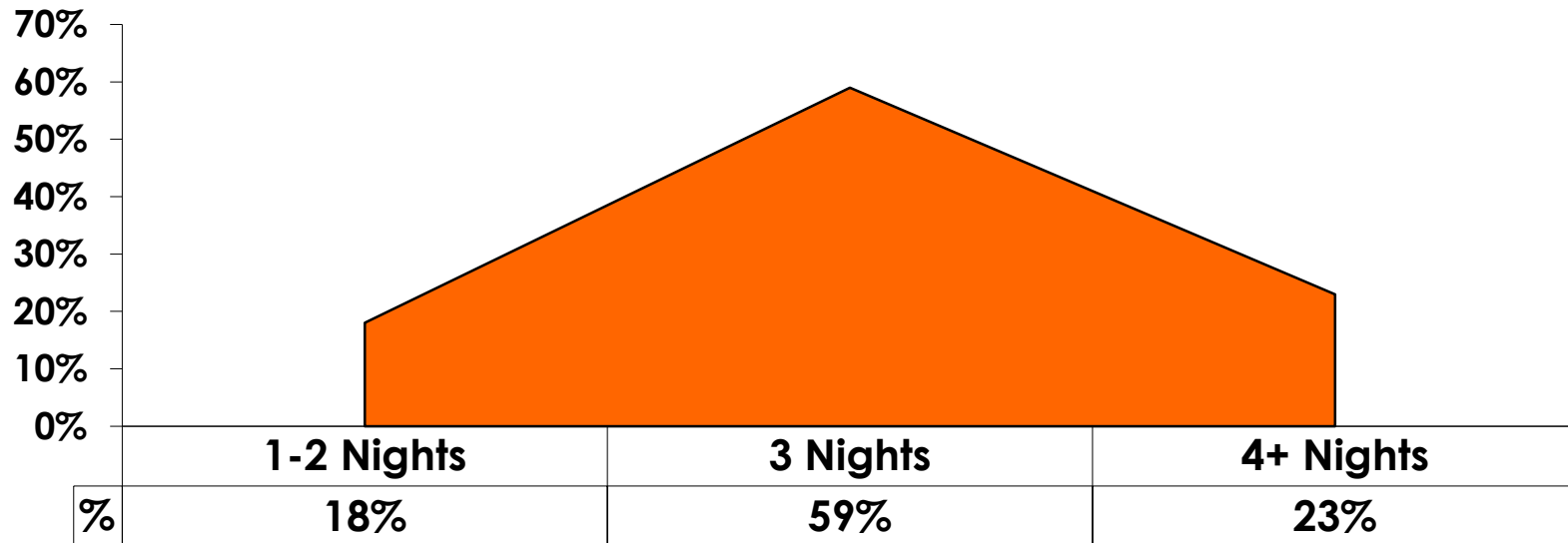
- The average repeat visitor has been to Guam 3.16 times.

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

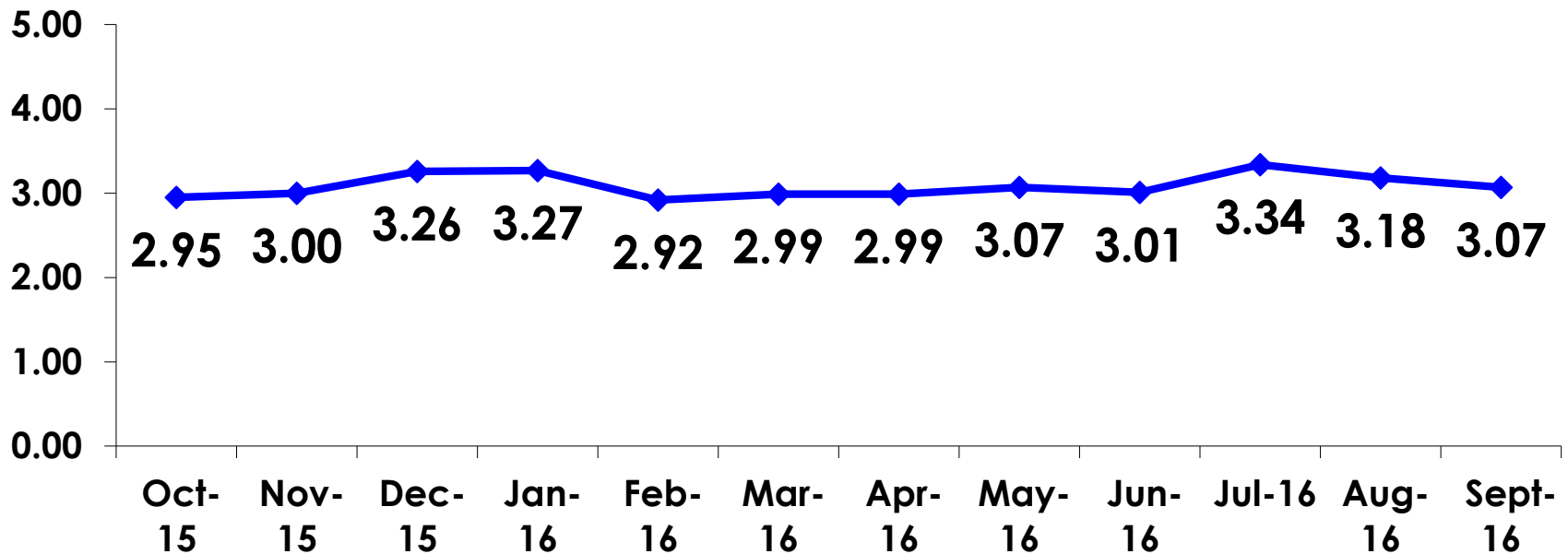


Length of Stay

Mean = 3.07 Days
Median = 3.0 Days



AVG LENGTH OF STAY

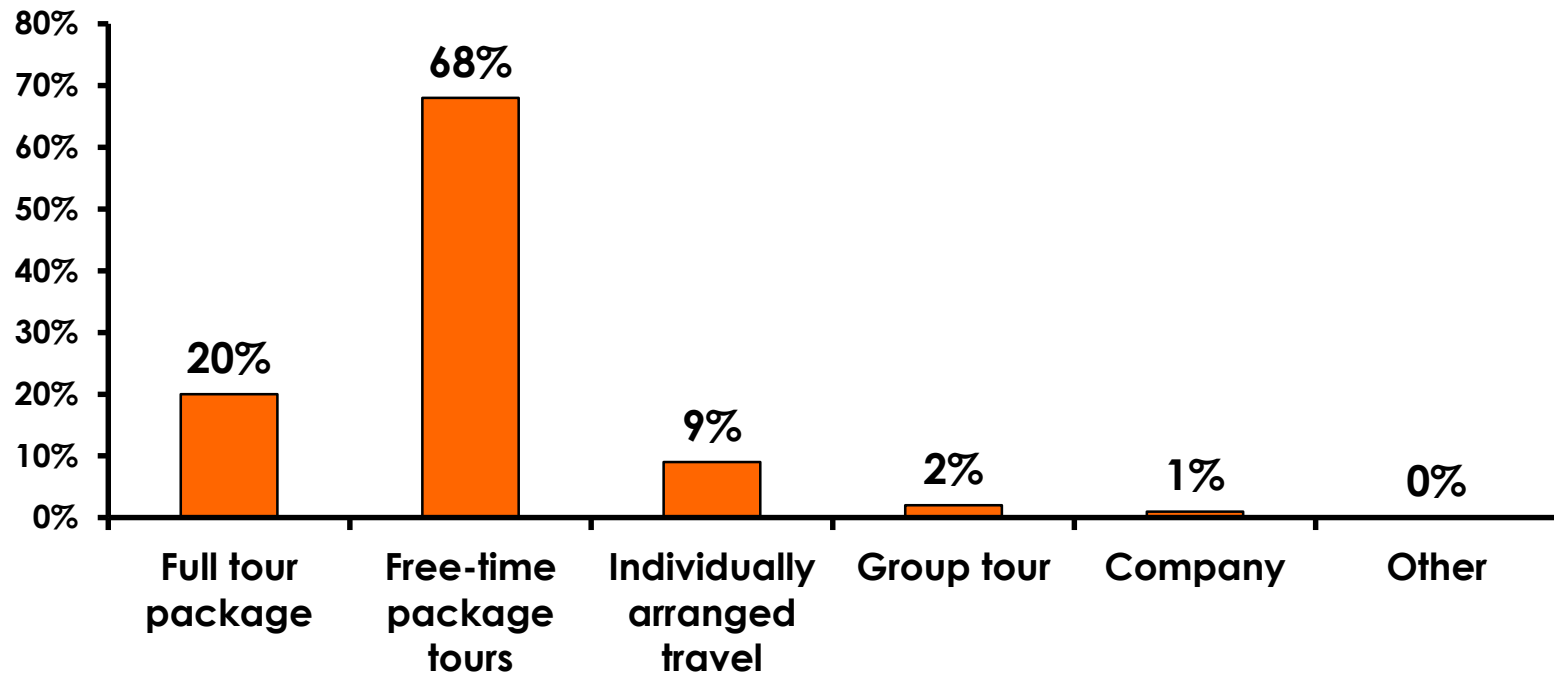


Occupation by Income

		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	Student	36%	27%	22%	10%	30%	29%	26%	33%	100%	
	Engineer	15%		15%	28%	28%	22%	21%	4%		
	Office worker non-mgr	12%	23%	15%	17%	12%	11%	8%	7%		
	Salesperson	11%	9%	15%	24%	12%	14%	15%	4%		
	Self-employed	6%	5%	4%			13%	5%	17%		
	Manager	4%		4%		2%	3%	8%	13%		
	Professional/ Specialist	4%	9%	7%	3%	5%	2%	3%	7%		
	Skilled worker	3%	5%	4%	3%	5%		5%	2%		
	Homemaker	2%	14%			2%	2%	3%	4%		
	Freeter	2%	9%	4%					2%		
	Govt- office worker non-mgr	2%			7%		2%	3%	2%		
	Other	1%		7%		5%					
	Govt- Manager	1%						3%	4%		
	Executive (30+ employees)	1%			3%			3%			
	Retired	1%			3%		2%				
	Unemployed	0%		4%							
	Govt- Executive	0%					2%				
	Total	Count	342	22	27	29	43	63	39	46	5

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

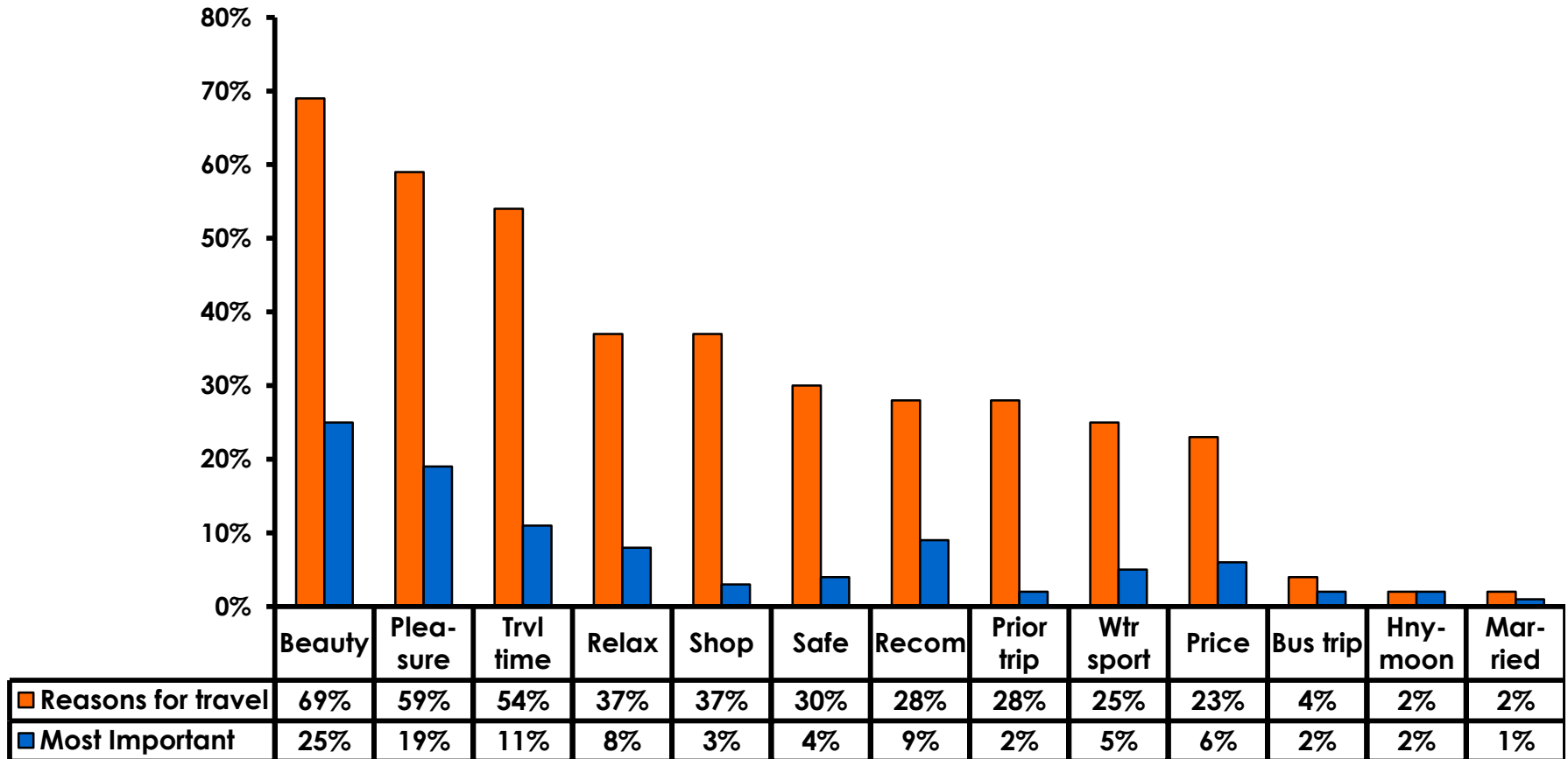


Accommodation by Income

Average length of stay: 3.07 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	19%	23%	22%	34%	14%	16%	26%	2%	20%	
	Hilton Guam Resort	7%	5%	7%	10%	14%	5%	8%	4%		
	PIC Club	7%	5%	4%	7%	7%	10%	5%	9%		
	Royal Orchid Guam	7%	9%		10%	5%	11%	3%	9%	20%	
	Fiesta Resort Guam	6%		11%		7%	5%	5%	9%	20%	
	Grand Plaza Hotel	6%	14%	11%	7%	5%	3%		2%		
	Holiday Resort Guam	6%	5%	7%	7%	5%	6%	8%	9%		
	Guam Reef & Olive Spa	5%	5%	4%	10%	7%	8%	5%	2%		
	Outrigger Guam Resort	5%	5%	7%		2%	8%	5%	7%		
	Hotel Nikko Guam	5%	14%		3%	5%	6%	5%	9%		
	Onward Beach Resort	4%		7%		5%	2%	5%	4%		
	Pacific Bay Hotel	4%	9%	15%	3%		2%	3%			
	Verona Resort & Spa	3%				2%	2%	3%	9%		
	Oceanview Hotel	3%			3%	5%	2%	3%	9%		
	Aqua Suites	3%	5%			2%	2%			40%	
	Westin Resort Guam	3%	5%	4%	3%	5%	2%	3%	2%		
	Bayview Hotel	2%				5%	3%		4%		
	Hyatt Regency Guam	2%				2%	3%	8%	2%		
	Dusit Thani Guam	1%				2%			7%		
	Leo Palace Resort	1%				2%	3%	3%			
	Lotte Hotel Guam	1%					2%	3%			
	Pacific Star Resort & Spa	1%					2%		2%		
	Sheraton Laguna Guam	0%						3%			
	Total	Count	351	22	27	29	43	63	39	46	5

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Short travel distance, 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	69%	74%	70%	65%	35%	61%	76%	
	Pleasure	59%	64%	58%	53%	46%	54%	65%	
	Short travel time	54%	50%	55%	72%	50%	57%	52%	
	Relax	37%	33%	43%	40%	42%	40%	34%	
	Shopping	37%	44%	32%	28%	27%	28%	45%	
	Safe	30%	26%	36%	39%	19%	28%	32%	
	Recomm- friend/family/trvl agnt	28%	37%	25%	12%	19%	26%	31%	
	Previous trip	28%	15%	32%	49%	62%	34%	22%	
	Water sports	25%	31%	22%	19%	4%	24%	25%	
	Price	23%	21%	31%	21%	19%	23%	23%	
	Company/ Business Trip	4%	2%	7%	4%	8%	3%	4%	
	Scuba	4%	4%	6%			4%	3%	
	Honeymoon	2%	2%	3%	2%		4%	1%	
	Married/ Attn wedding	2%	1%		5%	8%	3%	1%	
	Visit friends/ Relatives	2%	3%	1%	2%		2%	2%	
	Organized sports	1%	2%		4%		3%		
	Golf	1%		2%	5%		2%	1%	
	Other	1%	1%	1%	2%	4%	2%	1%	
	Career Cert/ Testing	1%	1%	1%			2%		
	Company Sponsored	0%				4%	1%		
	Total	Count	351	179	88	57	26	179	172

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	69%	77%	70%	72%	79%	67%	69%	57%	100%	
	Pleasure	59%	73%	63%	66%	58%	51%	54%	50%	100%	
	Short travel time	54%	50%	59%	52%	67%	49%	56%	63%	60%	
	Relax	37%	45%	41%	31%	49%	44%	33%	39%	60%	
	Shopping	37%	45%	41%	34%	44%	25%	44%	35%	80%	
	Safe	30%	41%	33%	48%	30%	30%	23%	35%	60%	
	Recomm- friend/family/trvl agnt	28%	27%	37%	21%	21%	32%	28%	20%	40%	
	Previous trip	28%	18%	37%	17%	23%	37%	31%	46%		
	Water sports	25%	27%	19%	24%	23%	21%	26%	26%	80%	
	Price	23%	23%	19%	34%	30%	16%	26%	24%	60%	
	Company/ Business Trip	4%		4%	7%	2%	3%	5%	4%		
	Scuba	4%	5%	7%	7%	2%	2%	3%	4%	20%	
	Honeymoon	2%	5%	7%		2%	3%		2%		
	Married/ Attn wedding	2%	5%			5%	2%	3%	4%		
	Visit friends/ Relatives	2%	9%	7%	3%						
	Organized sports	1%				2%			4%	20%	
	Golf	1%			3%			3%	2%		
	Other	1%	5%	7%					2%		
	Career Cert/ Testing	1%		4%			3%				
	Company Sponsored	0%									
	Total	Count	351	22	27	29	43	63	39	46	5

SECTION 3 **EXPENDITURES**

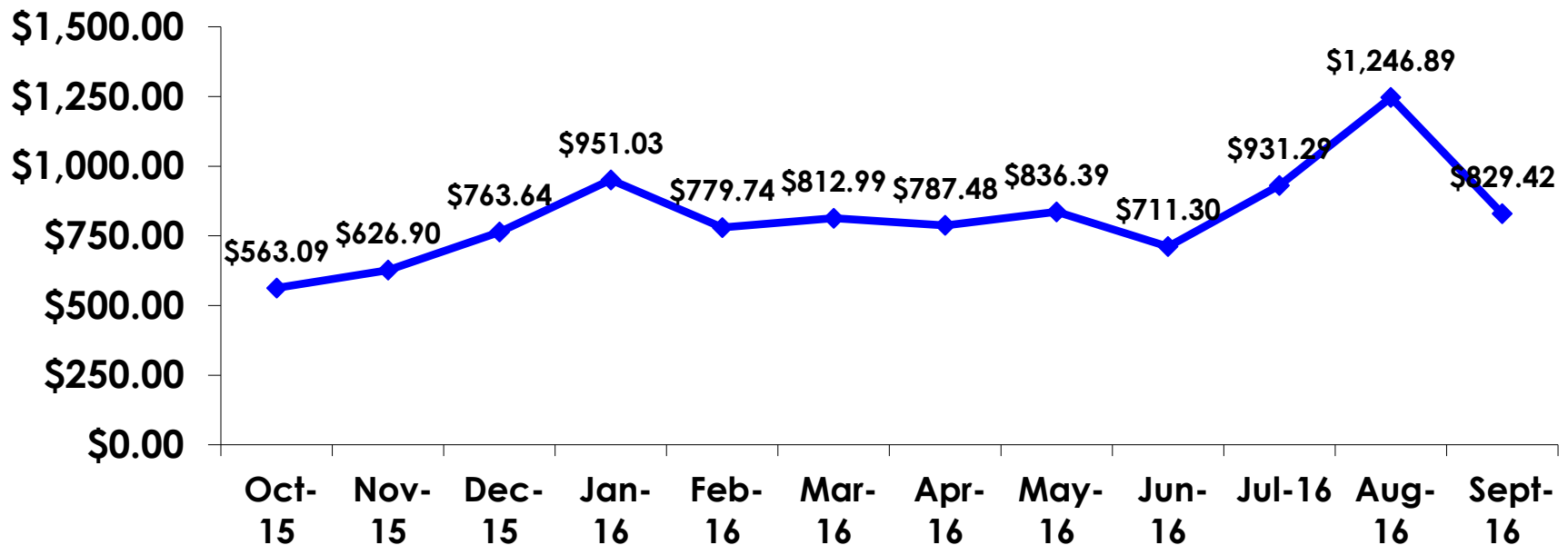
Prepaid Expenditures

¥102.14/US\$1

- \$1,369.35 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$22,919 = maximum (highest amount recorded for the entire sample)
- \$829.42 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$820.05

Breakdown of Prepaid Expenditures

¥102.14=\$1

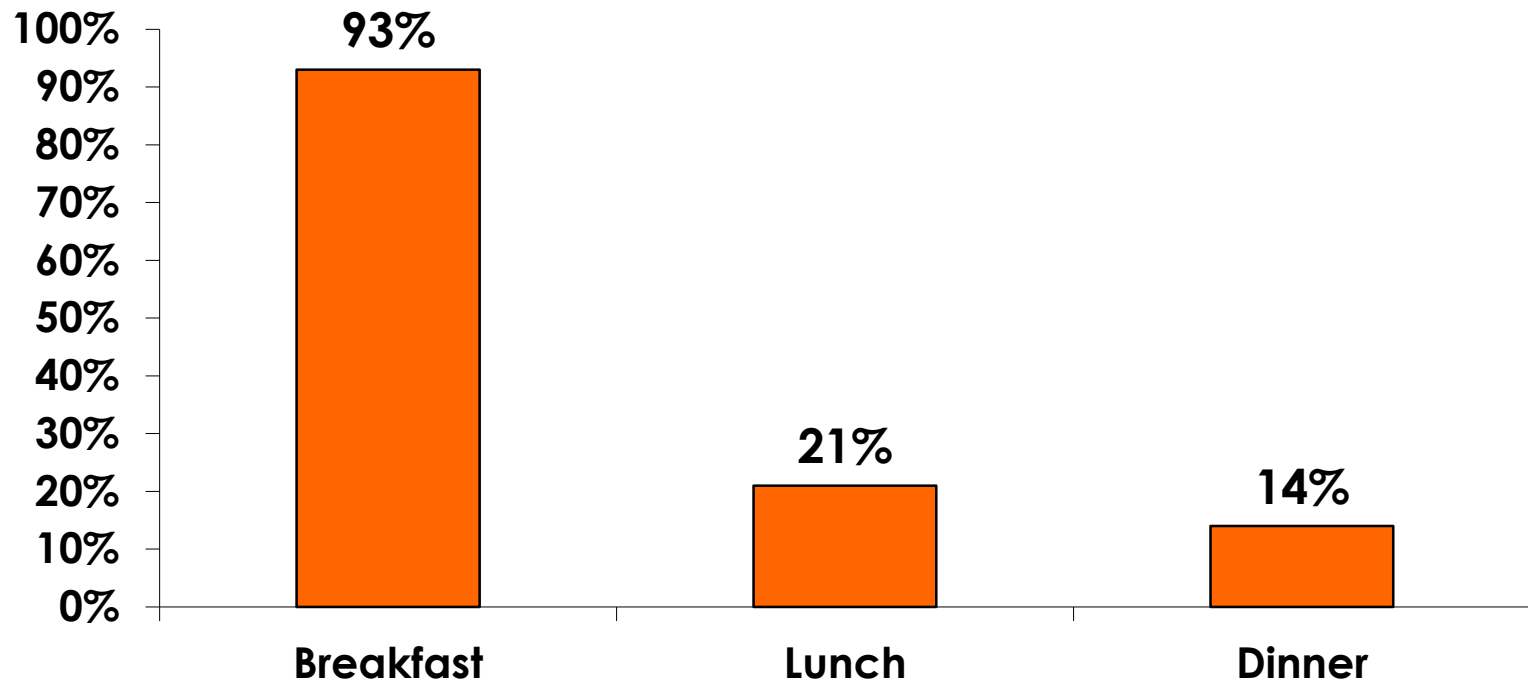
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,282.09
Air & Accommodation w/ daily meal package	\$1,881.87
Air only	\$1,153.65
Accommodation only	\$888.00
Accommodation w/ daily meal only	\$986.04
Food & Beverages in Hotel	\$9.79
Ground transportation – Japan	\$67.98
Ground transportation – Guam	\$28.39
Optional tours/ activities	\$251.04
Other expenses	\$623.83
Total Prepaid	\$1,369.35

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=29

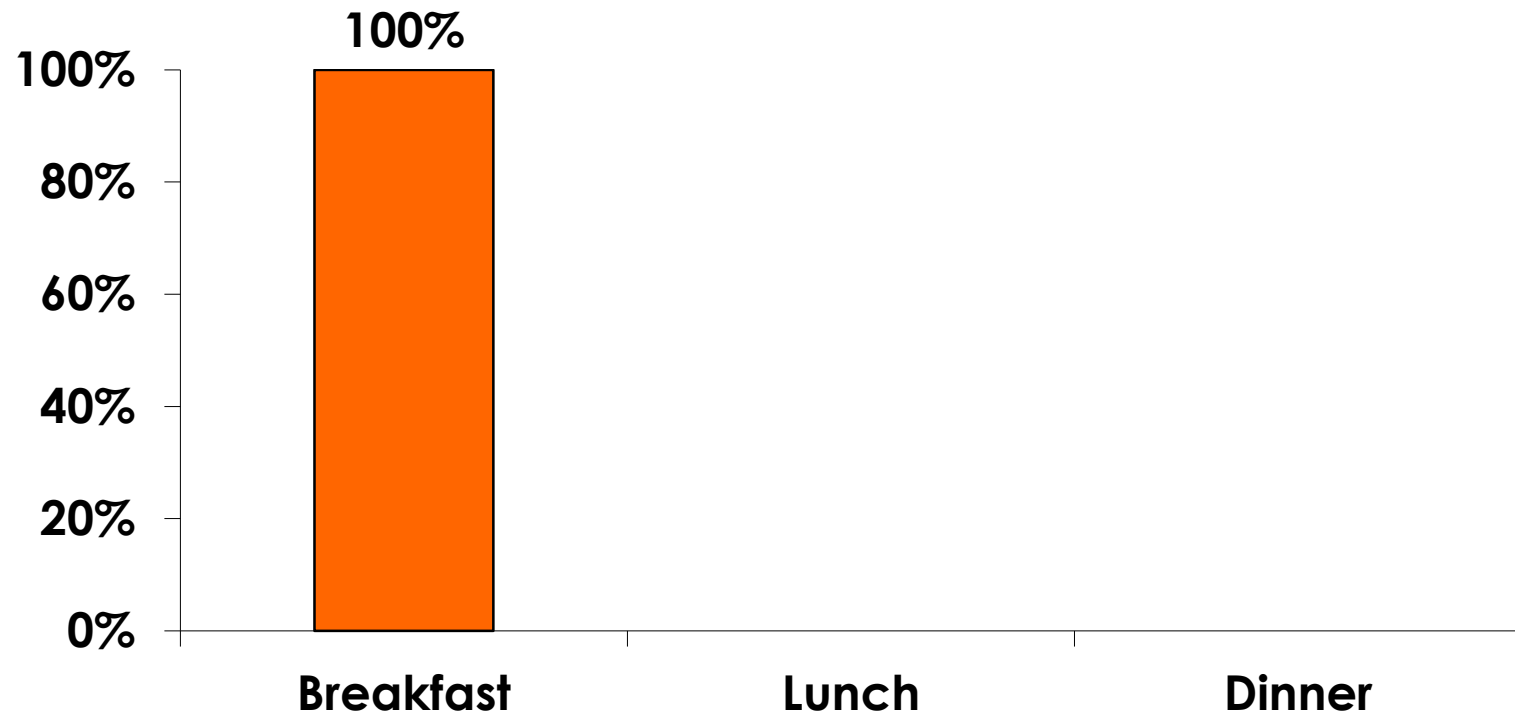


Mean=\$1,881.87 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

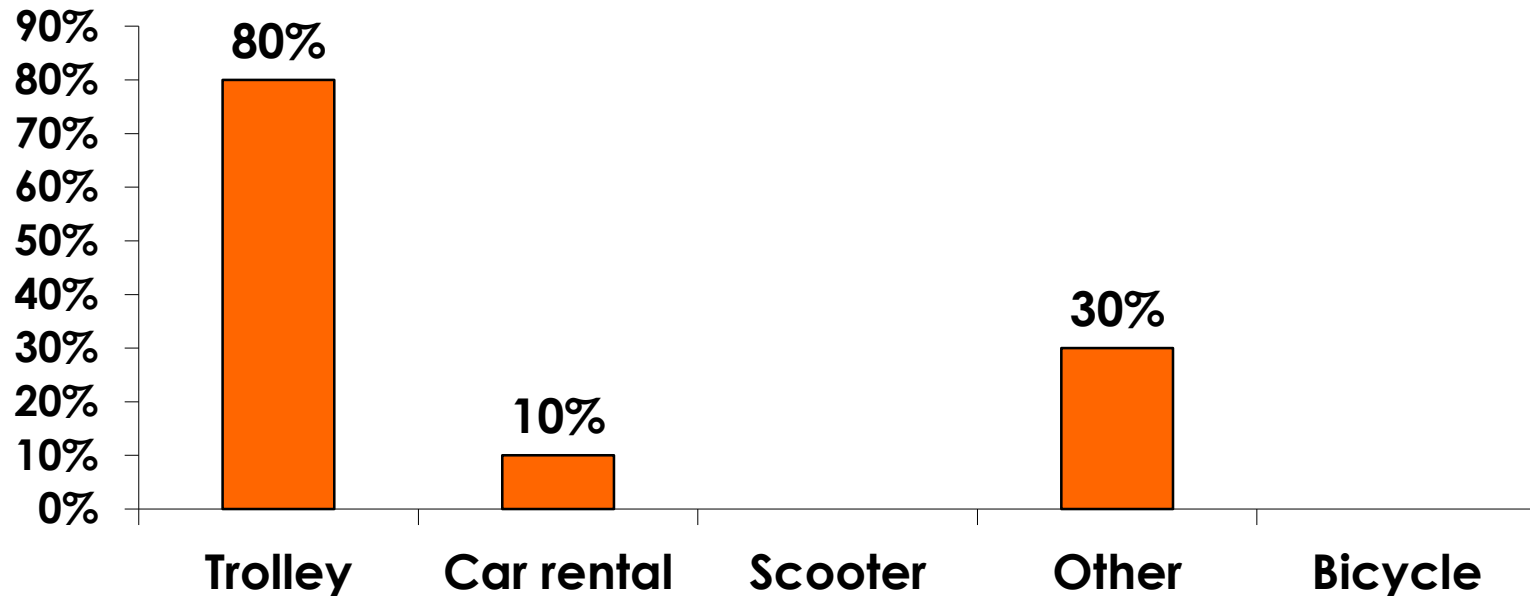
n=8



Mean=\$986.04 per travel party

PREPAID GROUND TRANSPORTATION

n=10



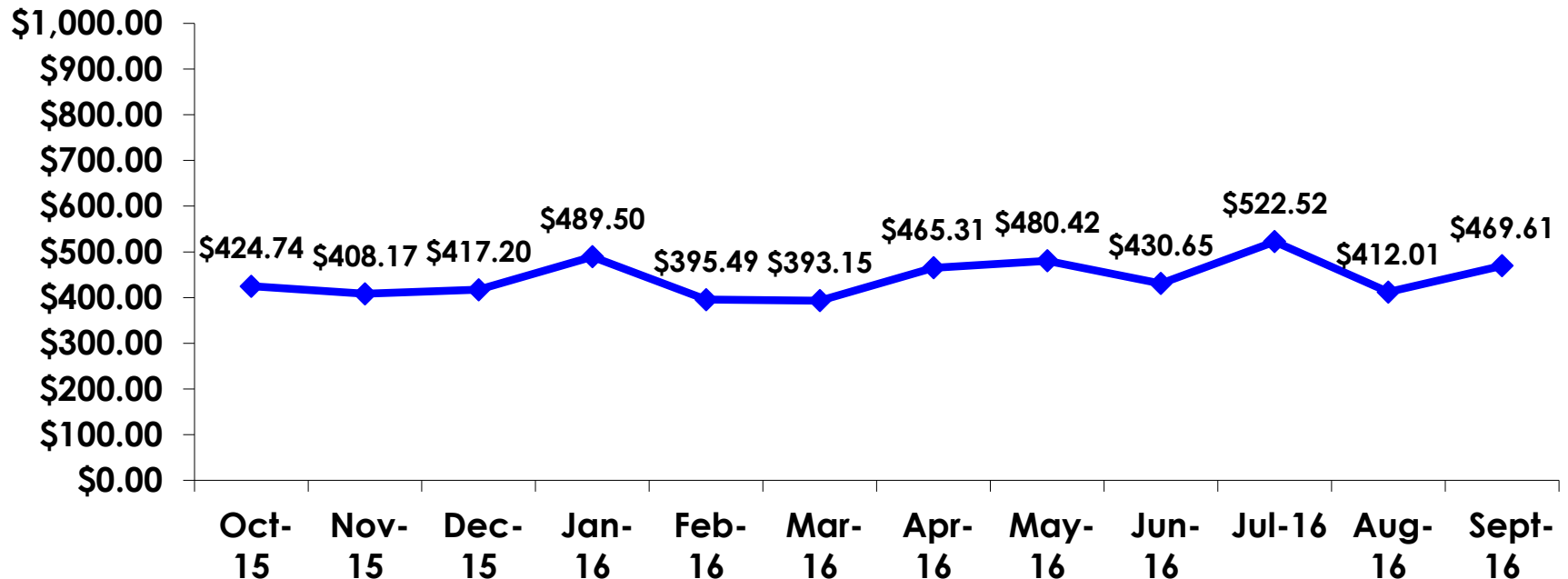
Mean=\$28.39 per travel party

On-Island Expenditures

- \$655.62 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,600 = Maximum (highest amount recorded for the entire sample)
- \$469.61 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

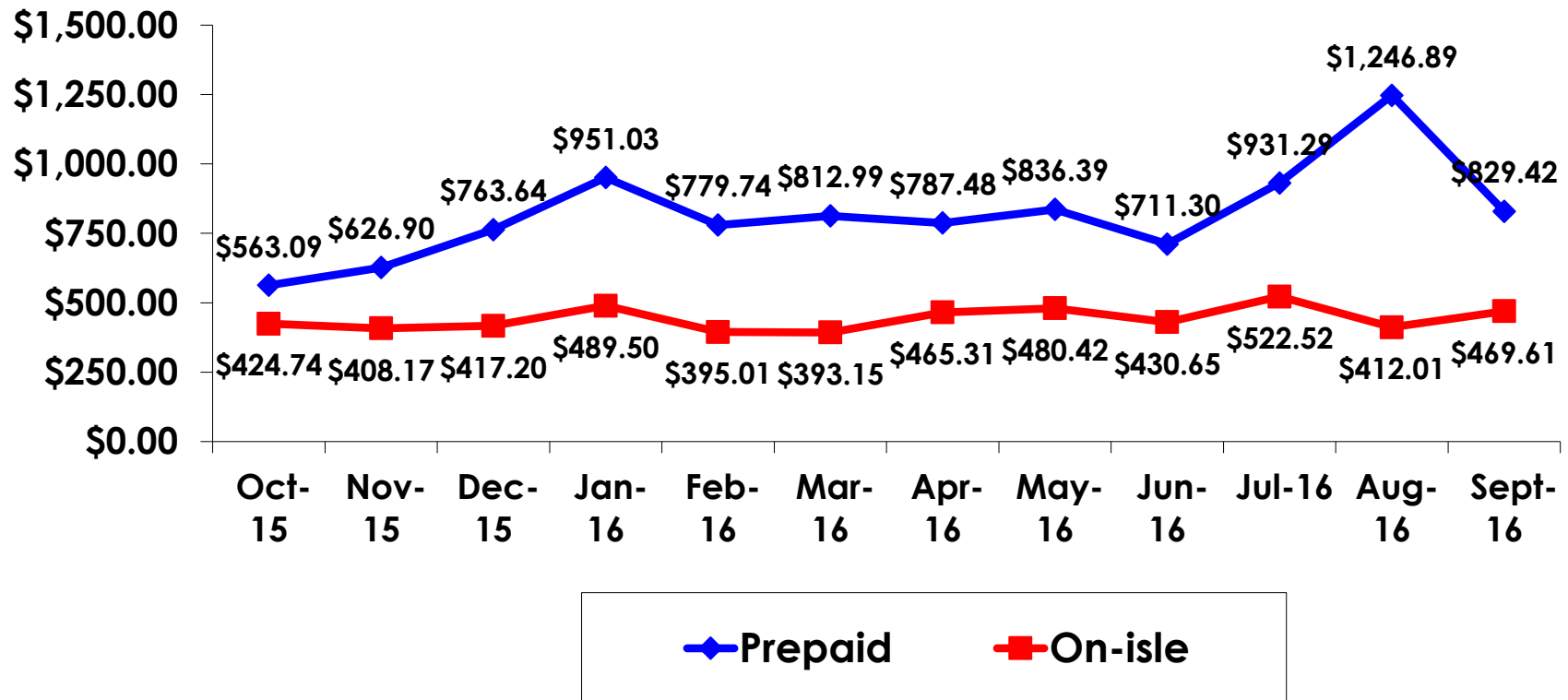


YTD = \$442.27

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$820.05

On-Isle YTD = \$442.27



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	\$469.61	\$486.15	\$452.40	\$564.82	\$439.61	\$431.33	\$454.14	\$417.26	\$479.88	\$721.50	\$520.83
	Median	\$355	\$400	\$333	\$450	\$375	\$333	\$300	\$345	\$300	\$400	\$325
	Minimum	\$0	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$30	\$100	\$150
	Maximum	\$4,000	\$4,000	\$2,500	\$4,000	\$1,700	\$1,475	\$2,500	\$2,500	\$2,013	\$2,500	\$1,600

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$42.51	\$64.59	\$19.53	\$24.50	\$28.07	\$108.68	\$60.38
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.87	\$41.77	\$21.56	\$28.17	\$31.74	\$41.14	\$34.81
	Median	\$0	\$15	\$0	\$5	\$0	\$20	\$5
F&B RESTRNT	Mean	\$73.55	\$98.42	\$47.67	\$39.09	\$84.33	\$128.21	\$145.77
	Median	\$19	\$30	\$3	\$0	\$30	\$50	\$45
OPT TOUR	Mean	\$54.85	\$61.96	\$47.46	\$45.92	\$66.19	\$79.09	\$19.23
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$156.39	\$180.18	\$131.63	\$112.81	\$152.11	\$329.74	\$89.23
	Median	\$25	\$43	\$13	\$28	\$5	\$80	\$80
GIFT- OTHER	Mean	\$94.24	\$96.37	\$92.02	\$74.97	\$119.60	\$129.86	\$62.69
	Median	\$40	\$50	\$20	\$40	\$35	\$100	\$0
TRANS	Mean	\$15.65	\$23.29	\$7.70	\$9.52	\$15.10	\$22.60	\$43.96
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$186.50	\$223.17	\$148.35	\$161.27	\$181.48	\$247.96	\$249.65
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$5
TOTAL	Mean	\$655.62	\$789.58	\$516.22	\$496.54	\$678.63	\$1,086.75	\$705.73
	Median	\$500	\$600	\$400	\$400	\$500	\$900	\$533

On-Island Expenditures

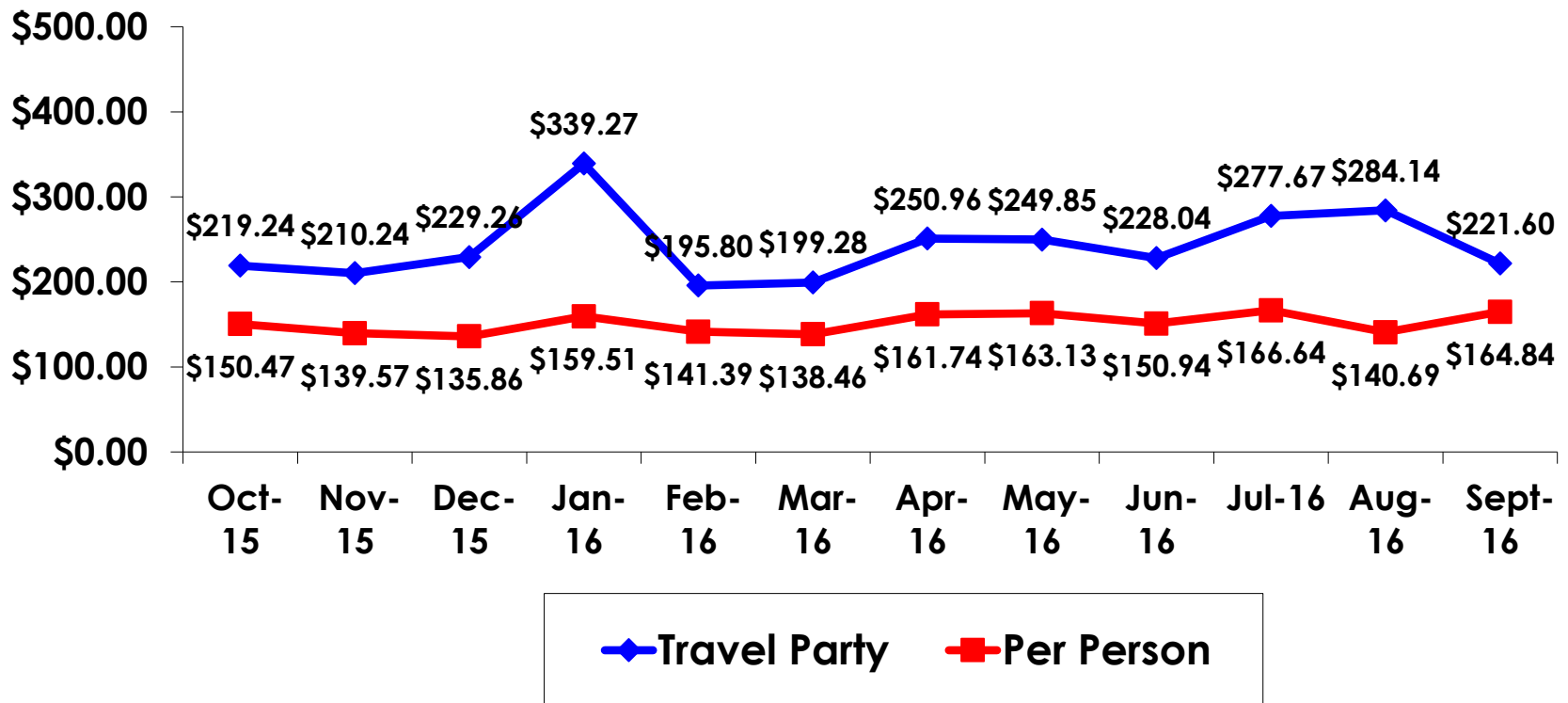
First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$42.51	\$37.43	\$52.80
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.87	\$28.93	\$37.82
	Median	\$0	\$0	\$17
F&B RESTRNT	Mean	\$73.55	\$57.92	\$105.22
	Median	\$19	\$5	\$30
OPT TOUR	Mean	\$54.85	\$49.55	\$65.59
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$156.39	\$112.67	\$244.97
	Median	\$25	\$10	\$62
GIFT- OTHER	Mean	\$94.24	\$89.09	\$104.66
	Median	\$40	\$40	\$50
TRANS	Mean	\$15.65	\$8.47	\$30.21
	Median	\$0	\$0	\$0
OTHER	Mean	\$186.50	\$187.29	\$184.92
	Median	\$0	\$0	\$0
TOTAL	Mean	\$655.62	\$571.56	\$825.93
	Median	\$500	\$450	\$520

ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$242.07

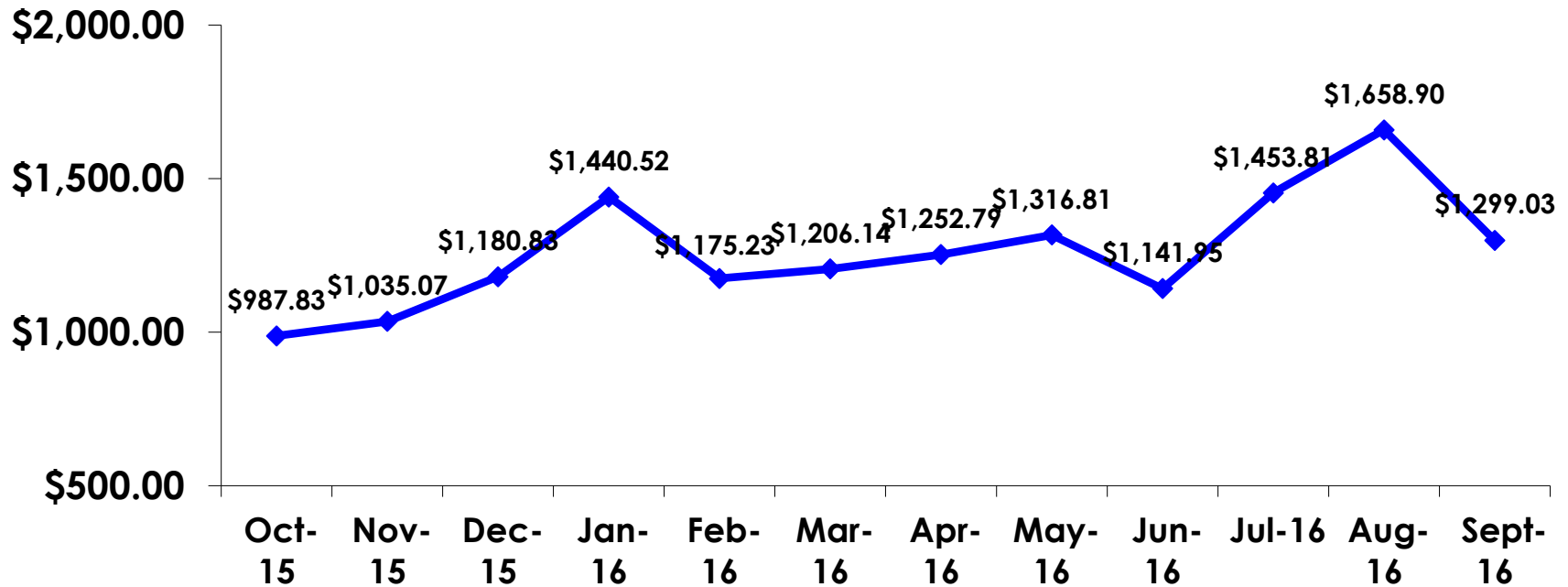
Per Person YTD = \$151.03



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,299.03 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,445 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



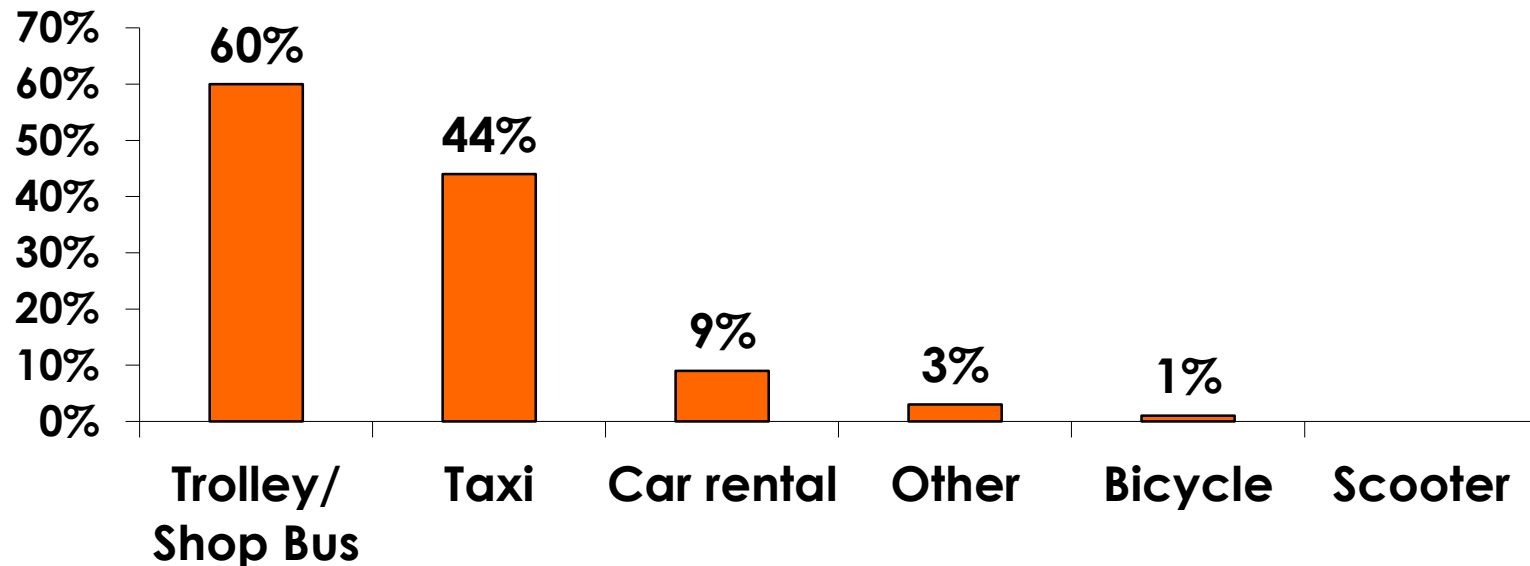
YTD=\$1,262.32

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$42.51
Food & beverage in fast food restaurant/convenience store	\$31.87
Food & beverage at restaurants or drinking establishments outside a hotel	\$73.55
Optional tours and activities	\$54.85
Gifts/ souvenirs for yourself/companions	\$156.39
Gifts/ souvenirs for friends/family at home	\$94.24
Local transportation	\$15.65
Other expenses not covered	\$186.50
Average Total	\$655.62

Local Transportation

n=101



Mean=\$15.65 per travel party

Guam Airport Expenditures

- \$30.00 = Mean
- \$8 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,300 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

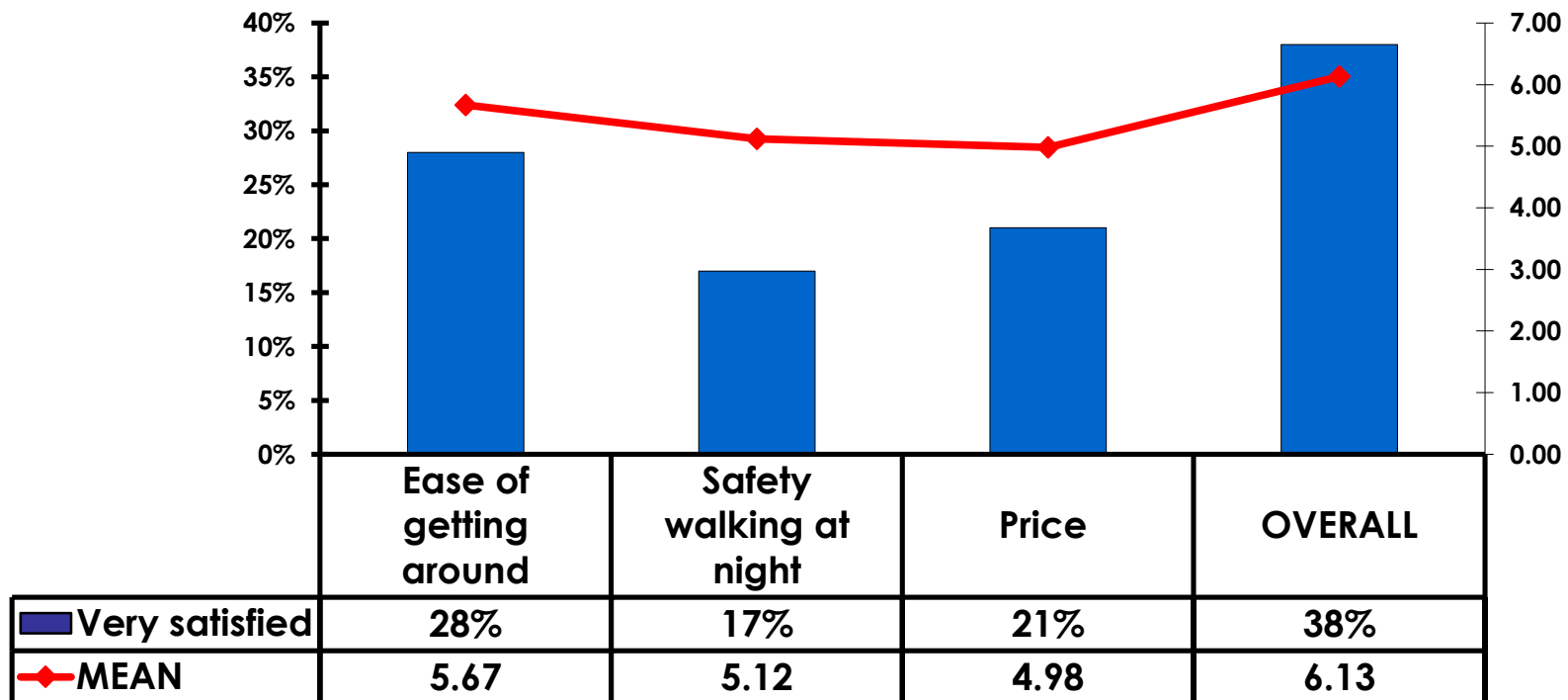
	MEAN \$
Food & Beverages	\$9.56
Gifts/Souvenirs Self	\$9.63
Gifts/Souvenirs Others	\$10.81
Total	\$30.00

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

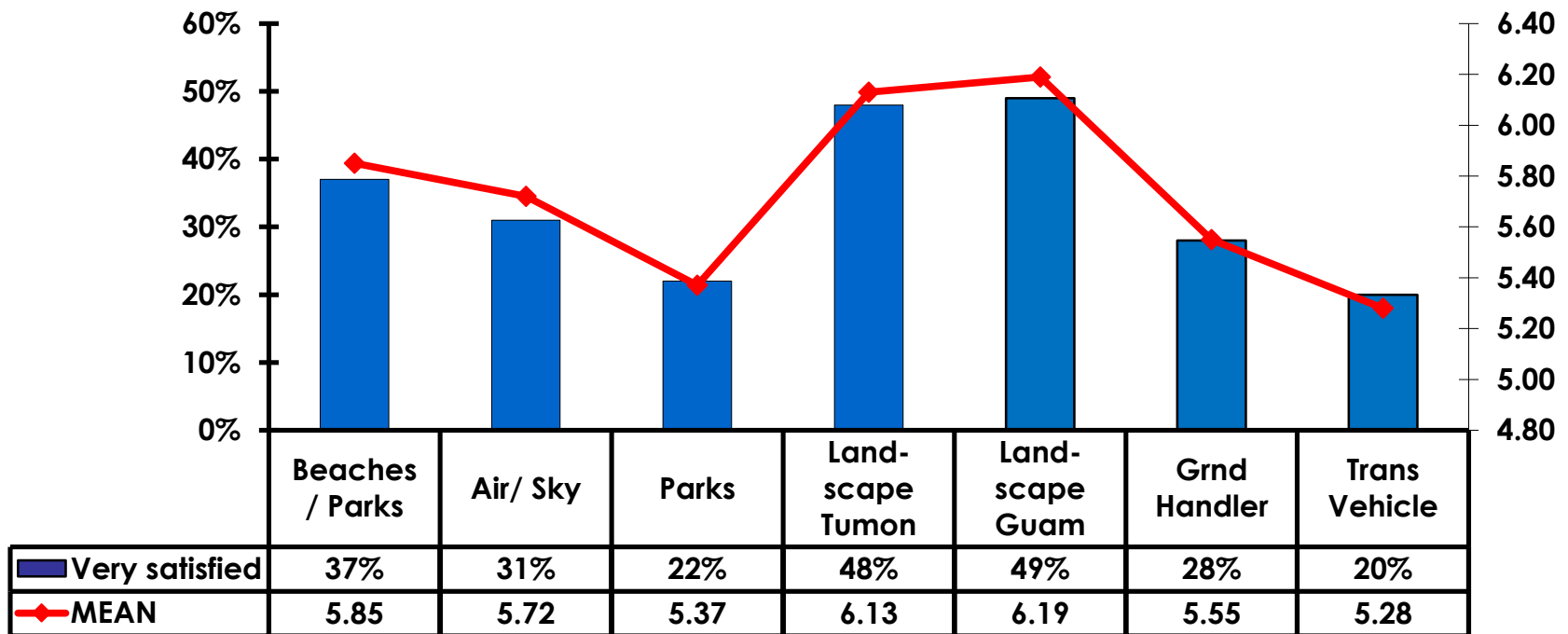
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

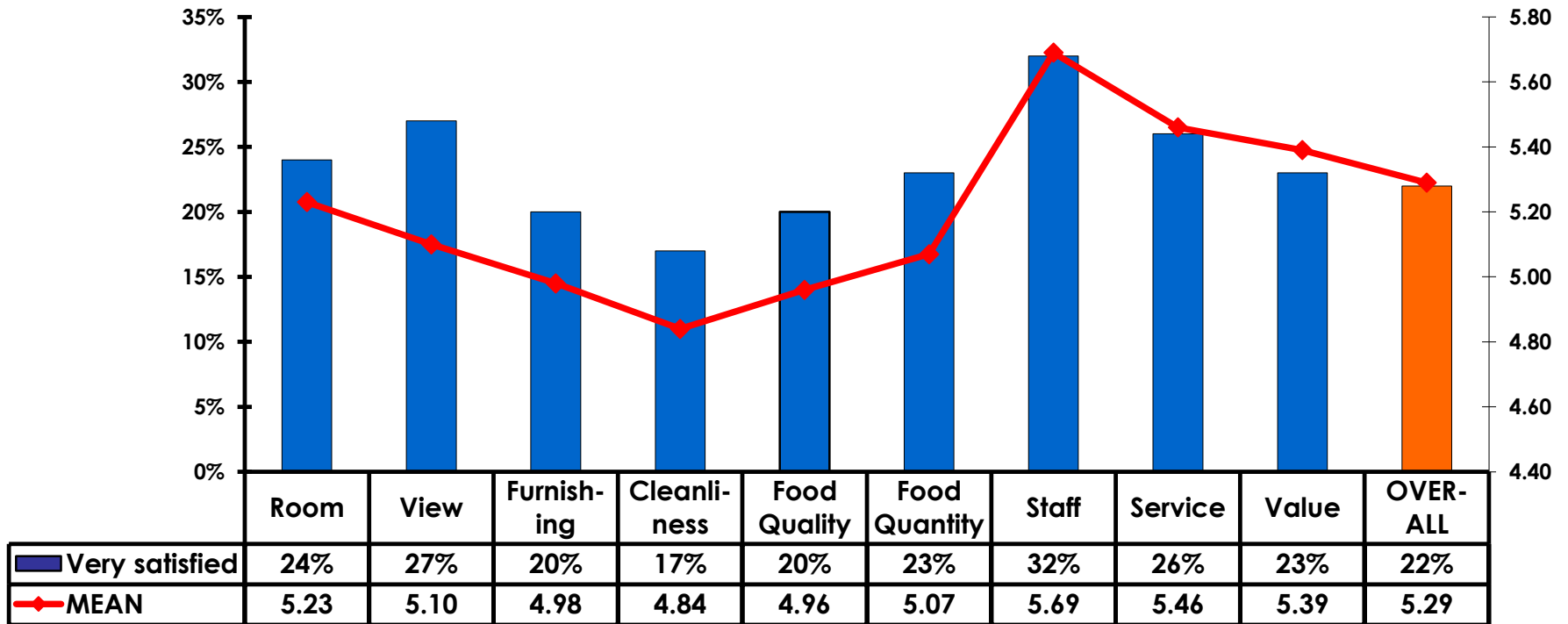
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

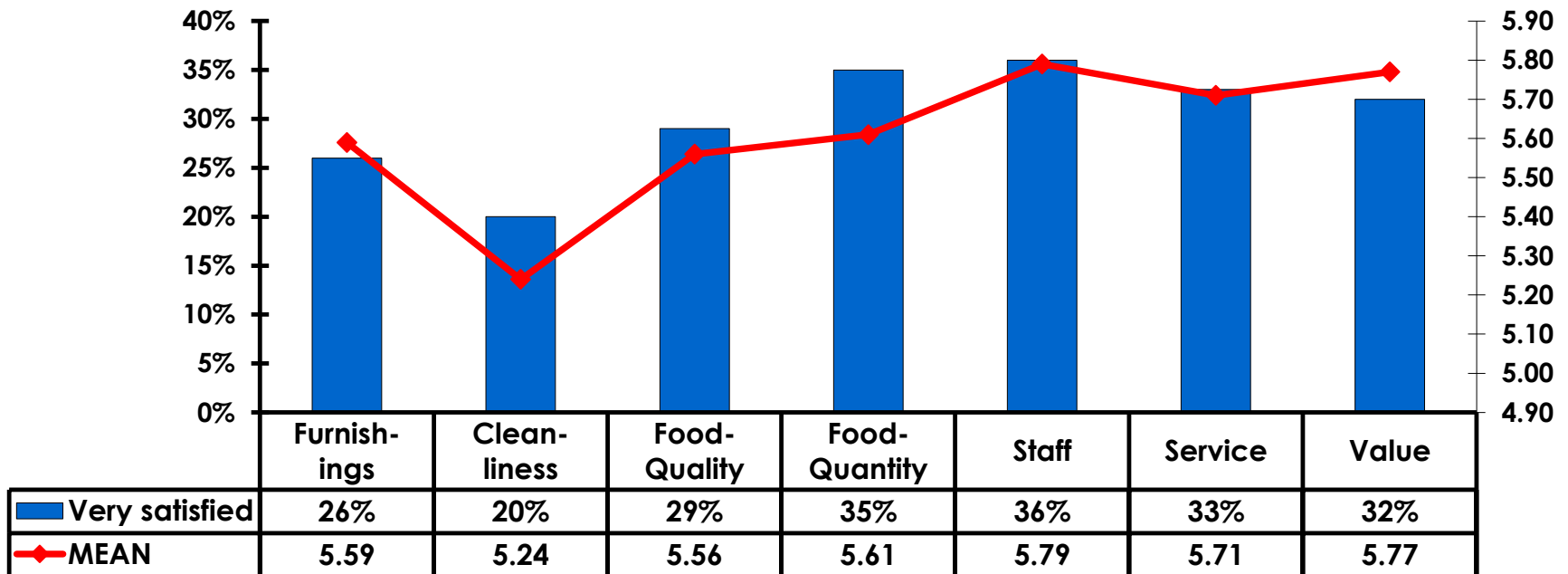
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

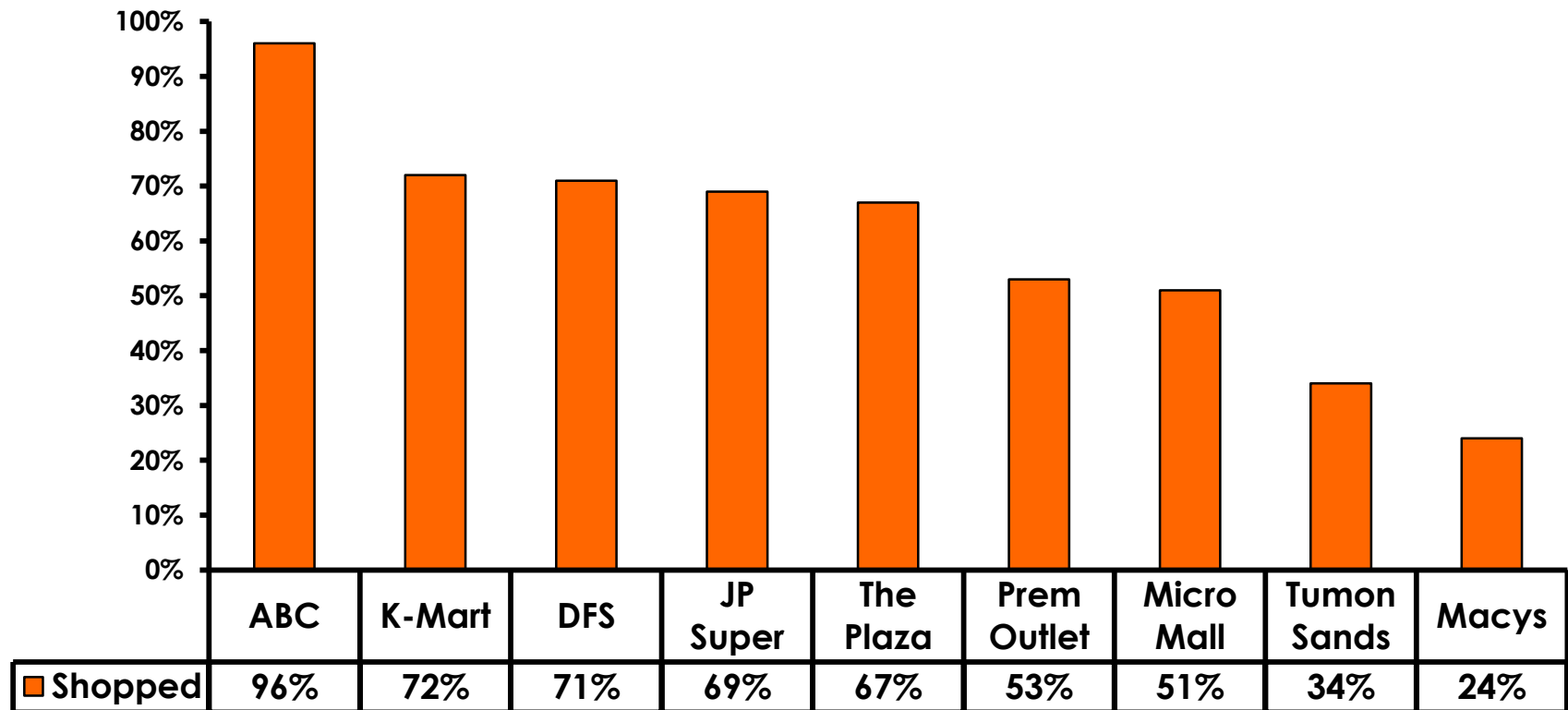
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

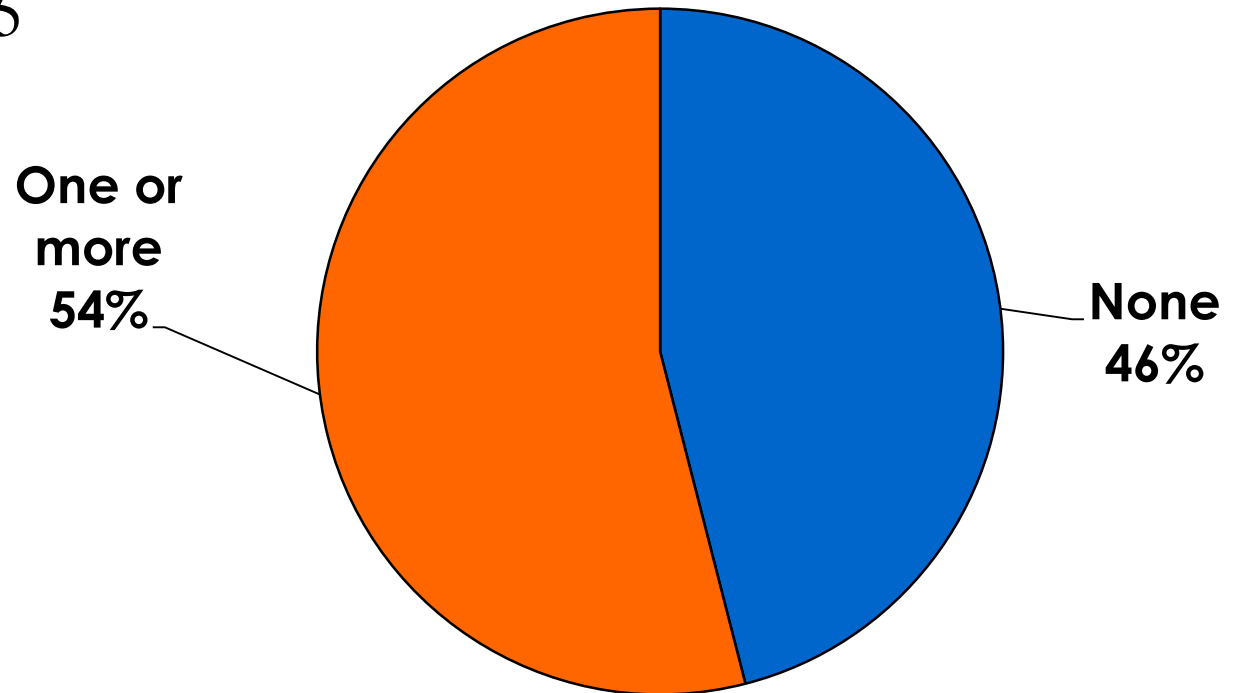
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 64%	Score of 6 to 7 = 63%
Score of 4 to 5 = 34%	Score of 4 to 5 = 32%
Score 1 to 3 = 1%	Score 1 to 3 = 5%
MEAN = 5.74	MEAN = 5.62

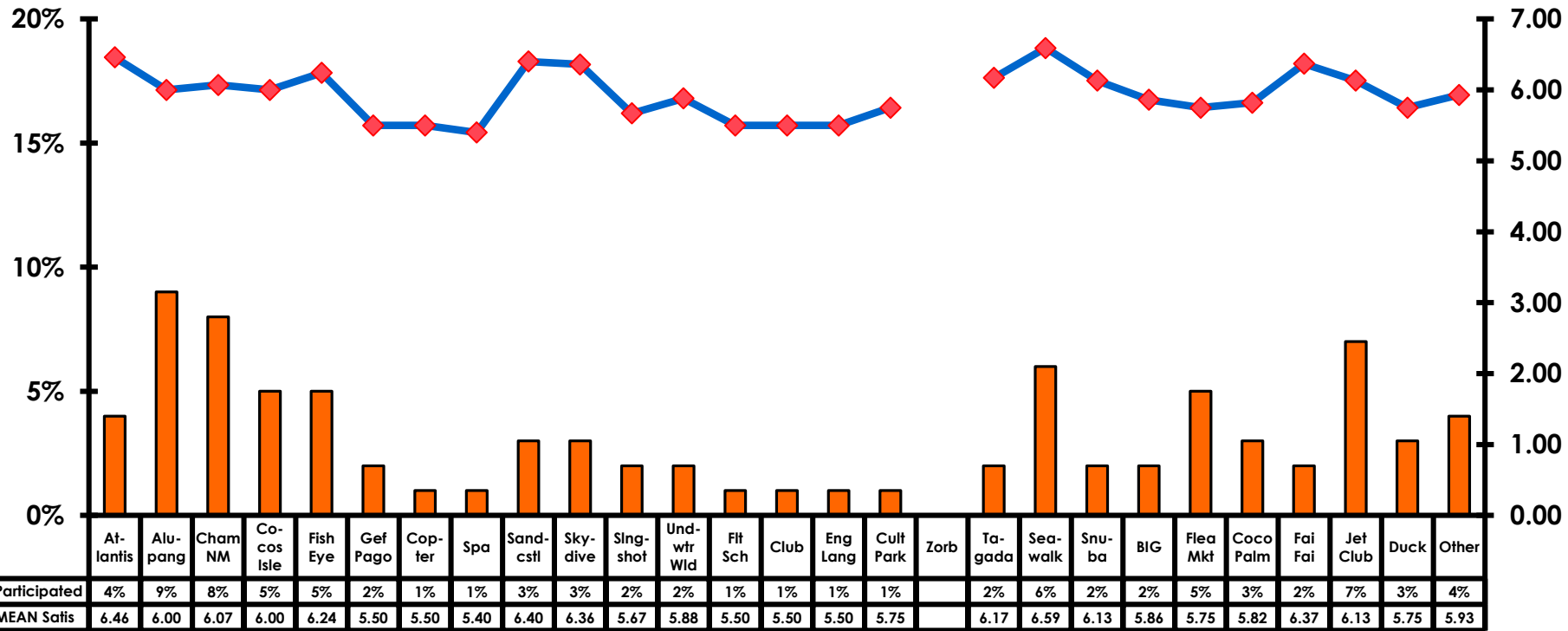
Optional Tour Participation

- Average number of tours participated in is .85



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 = 62%	Score of 6 to 7 = 59%
Score of 4 to 5 = 37%	Score of 4 to 5 = 39%
Score 1 to 3 = 1%	Score 1 to 3 = 1%
MEAN = 5.67	MEAN = 5.58

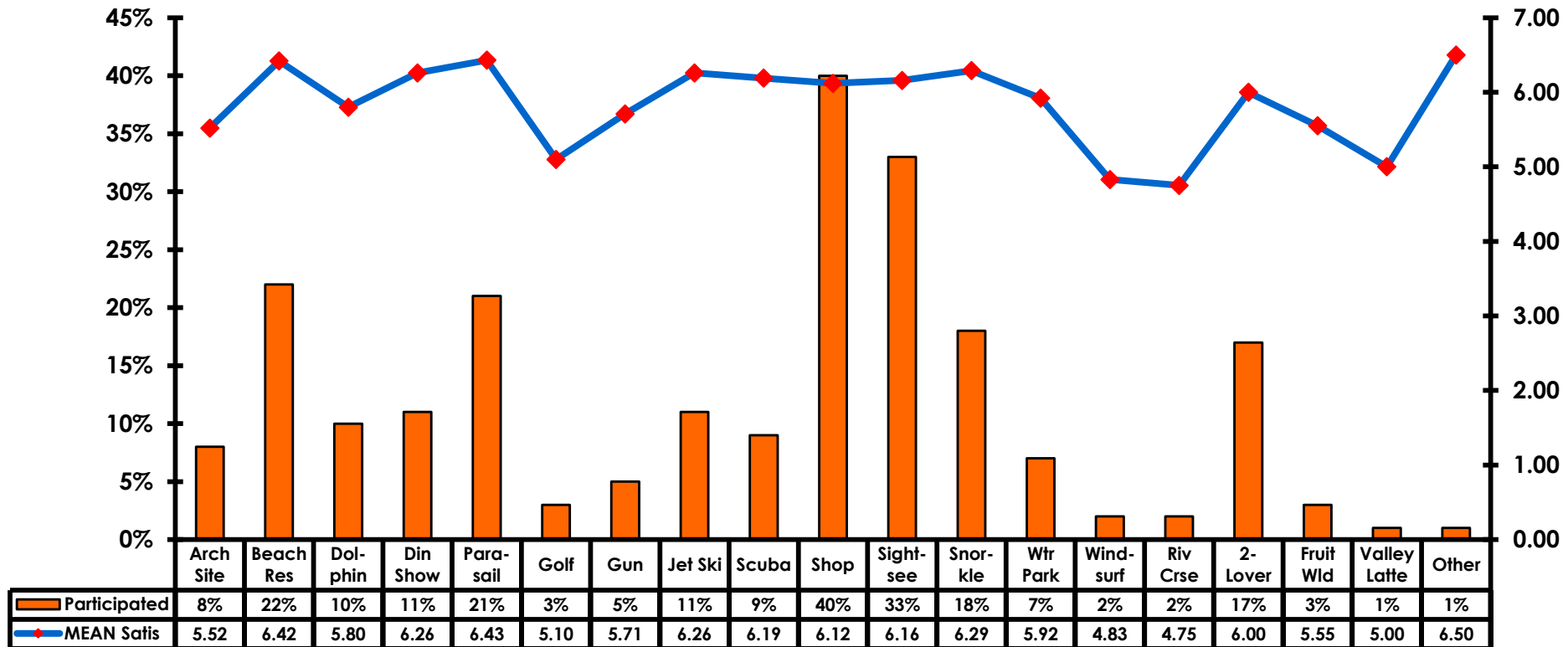
Night Tours Satisfaction

7pt Rating Scale

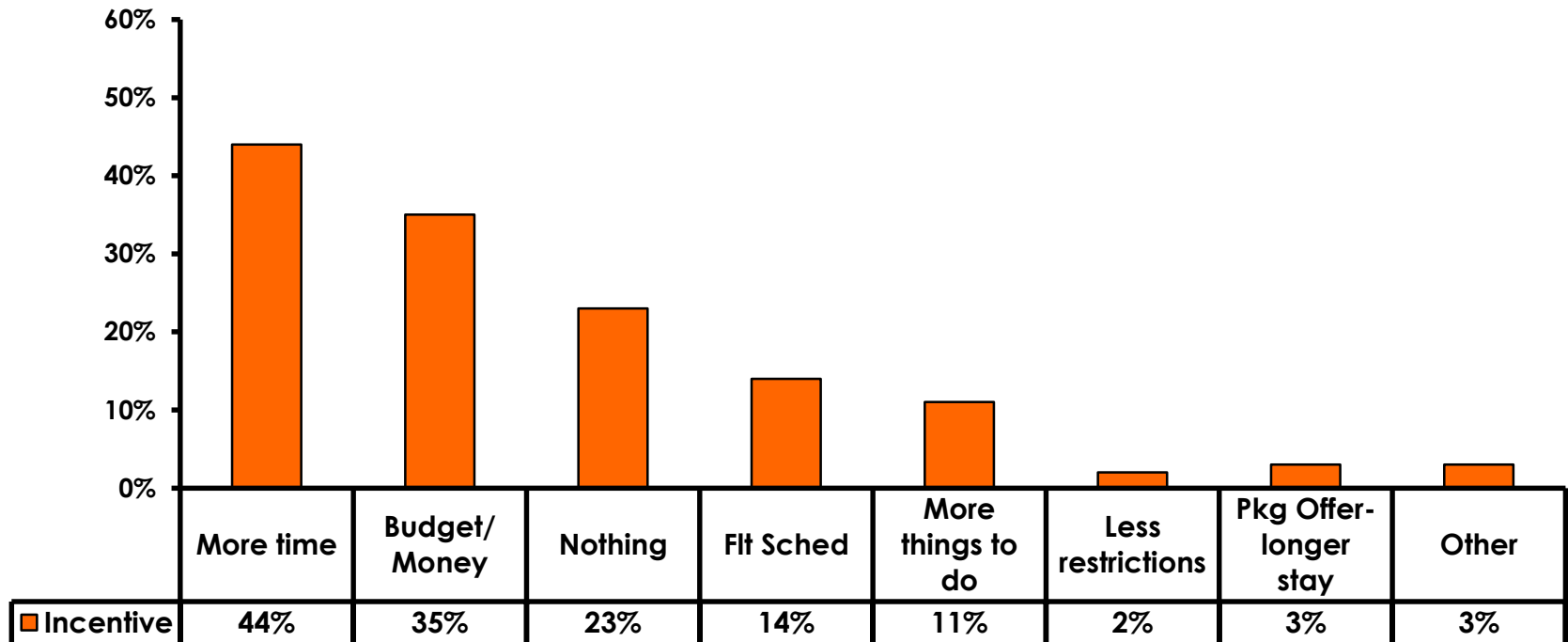
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 34%	Score of 6 to 7 = 36%
Score of 4 to 5 = 64%	Score of 4 to 5 = 61%
Score 1 to 3 = 3%	Score 1 to 3 = 3%
MEAN = 4.86	MEAN = 4.91

Satisfaction with Other Activities



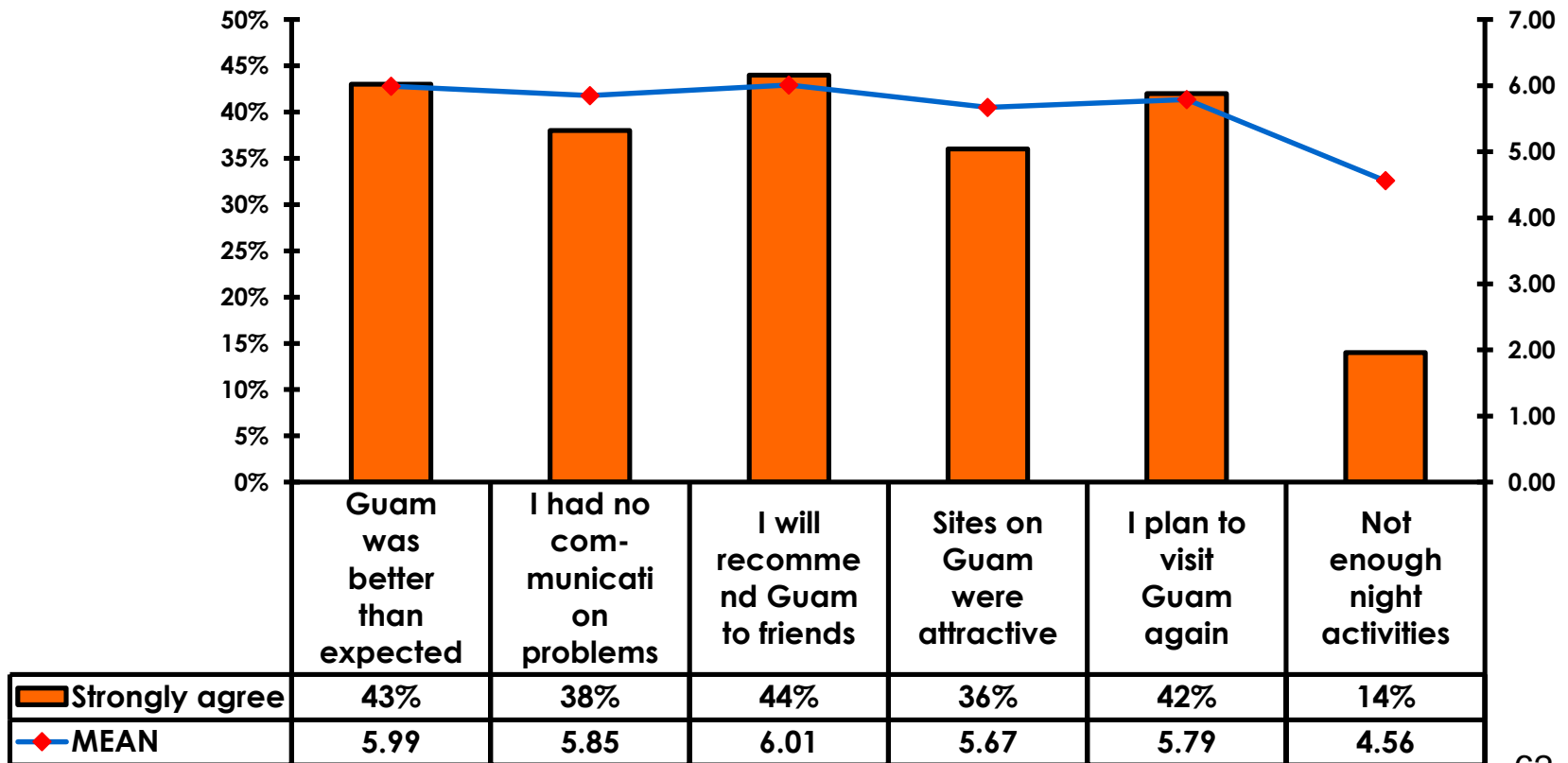
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

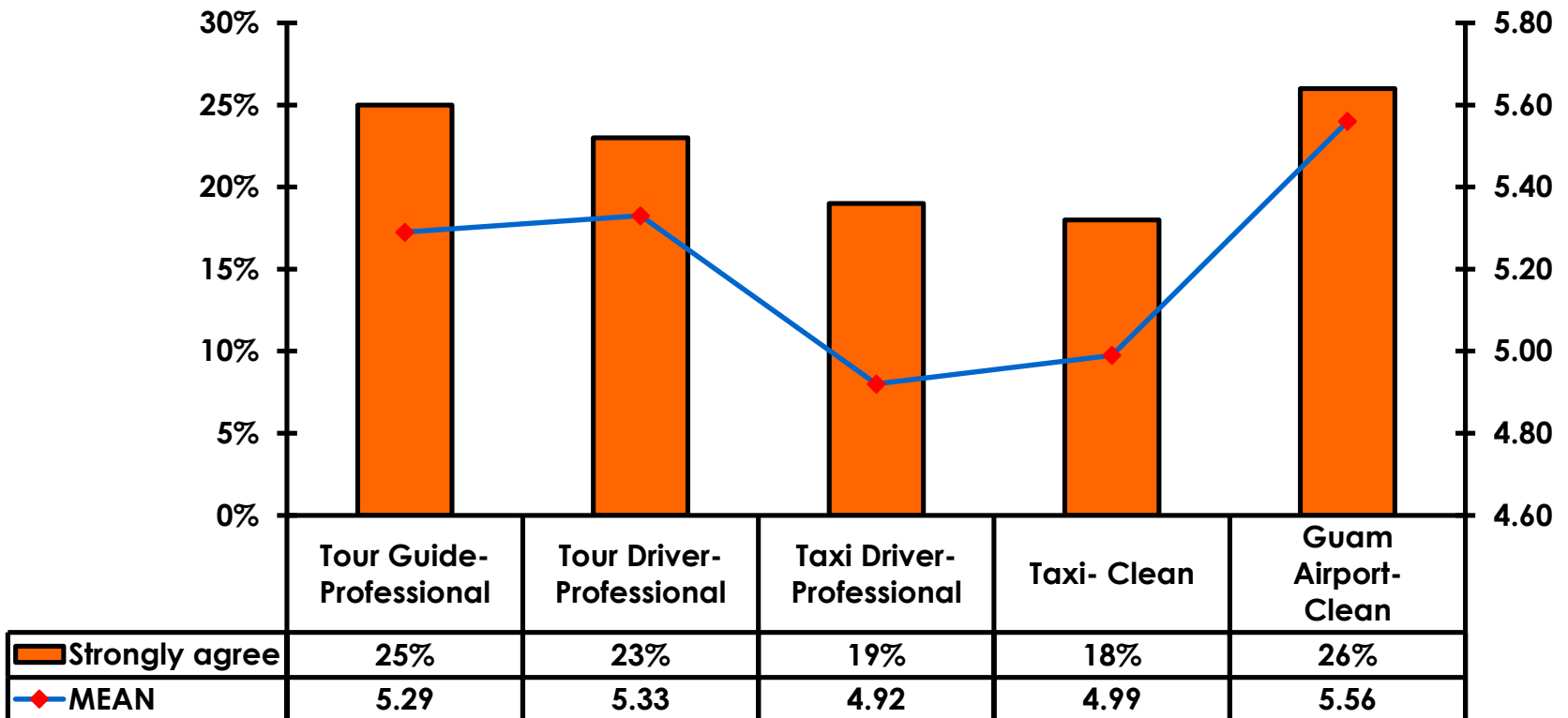
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

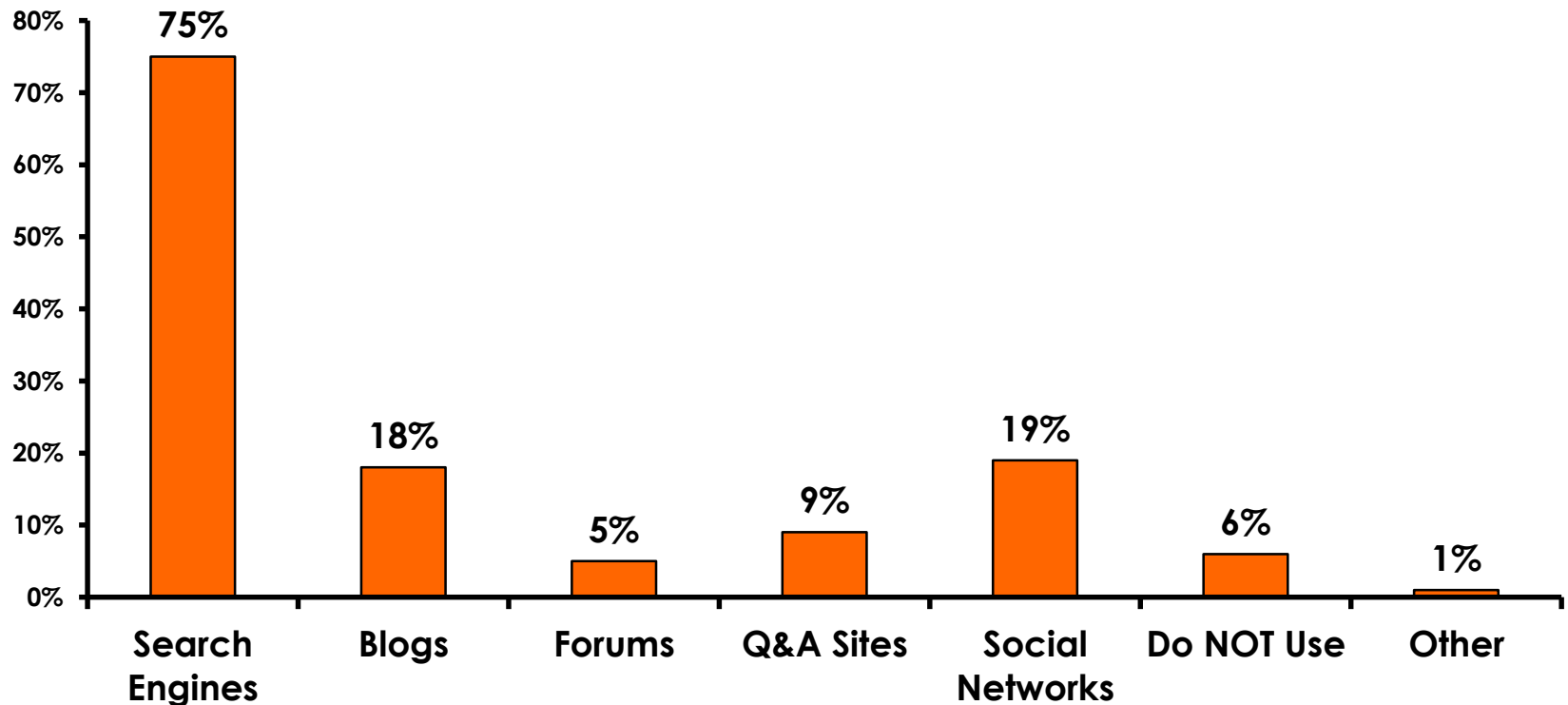
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



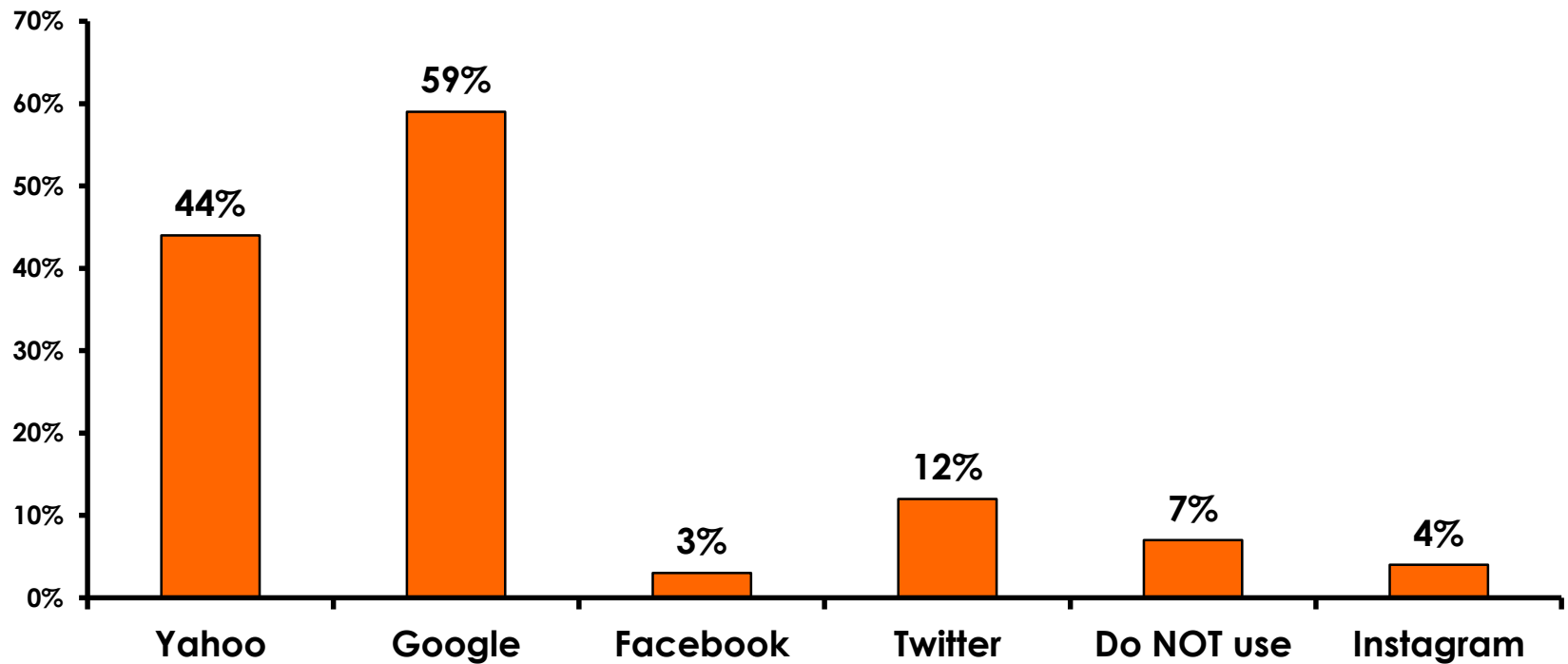
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

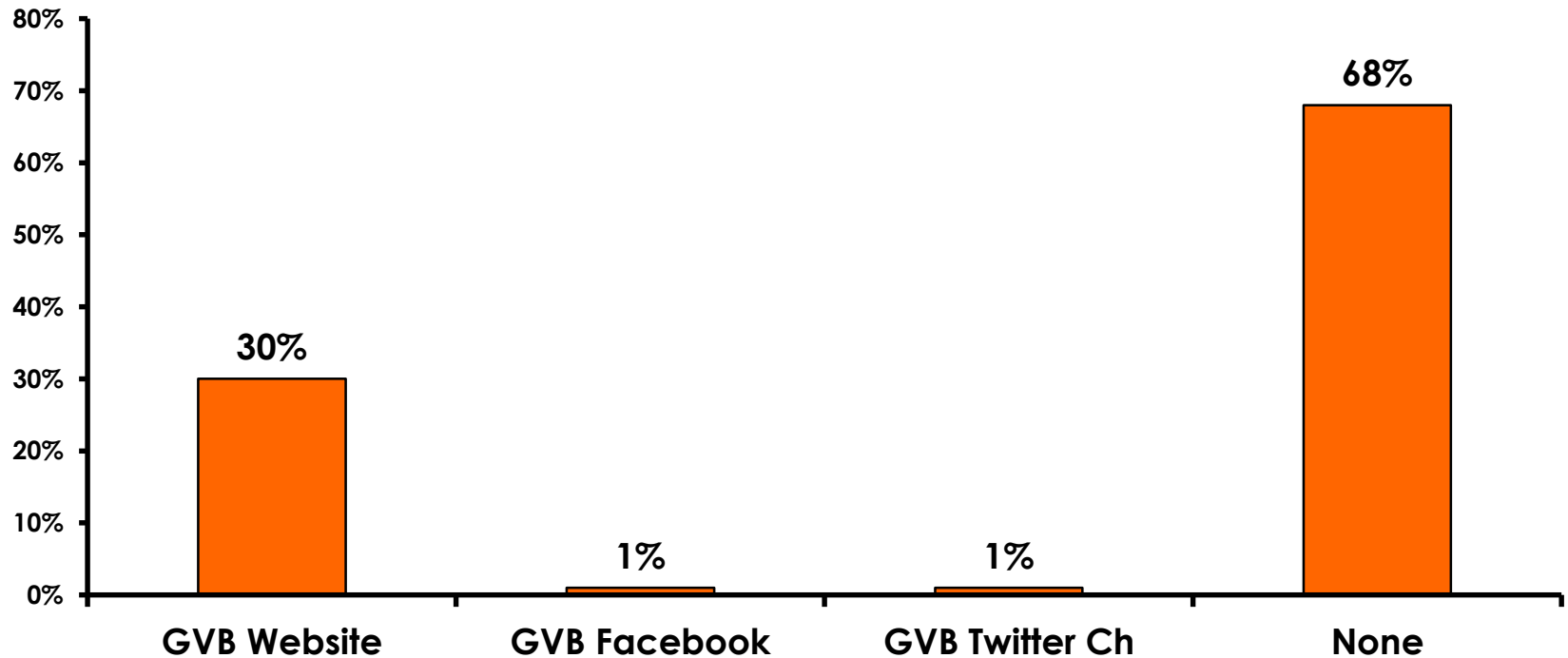


Internet- Things To Do

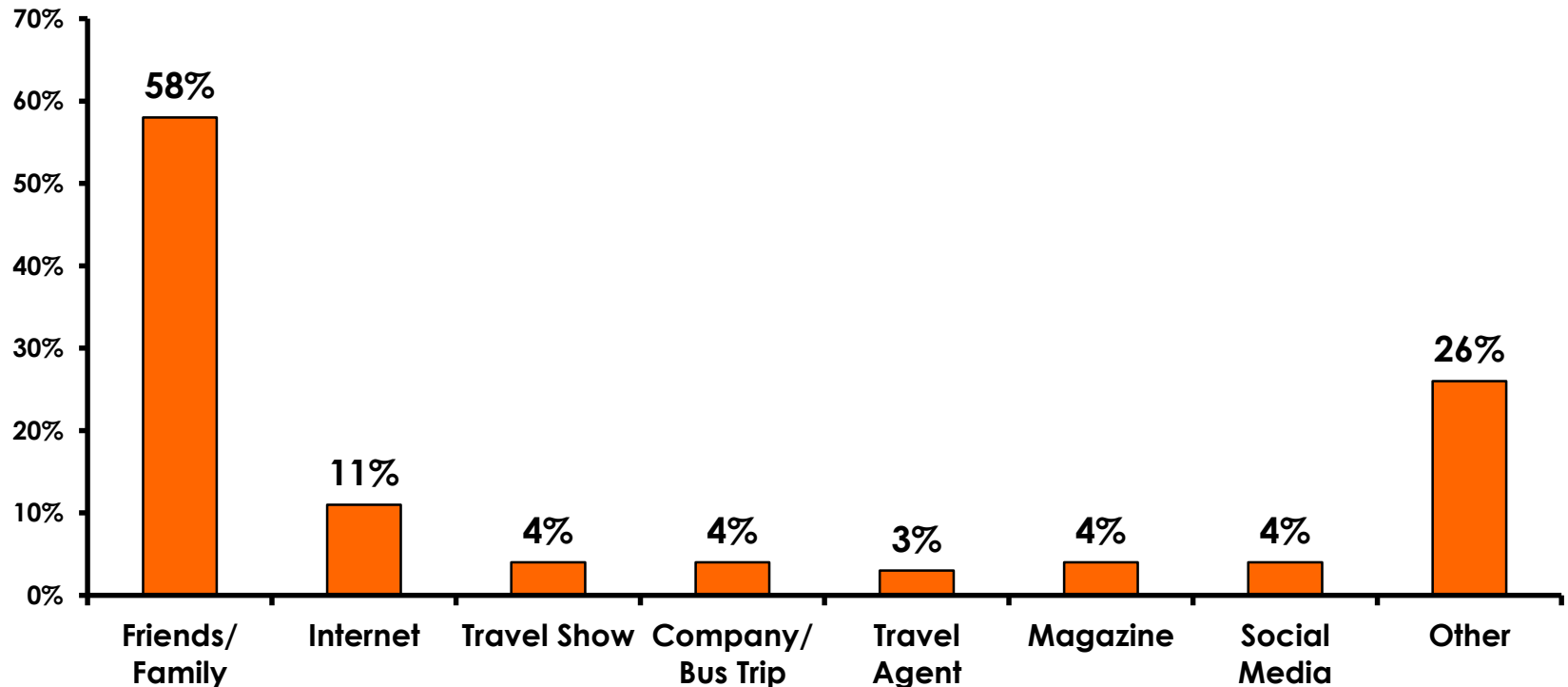
Sources of Info



Internet- GVB Sources

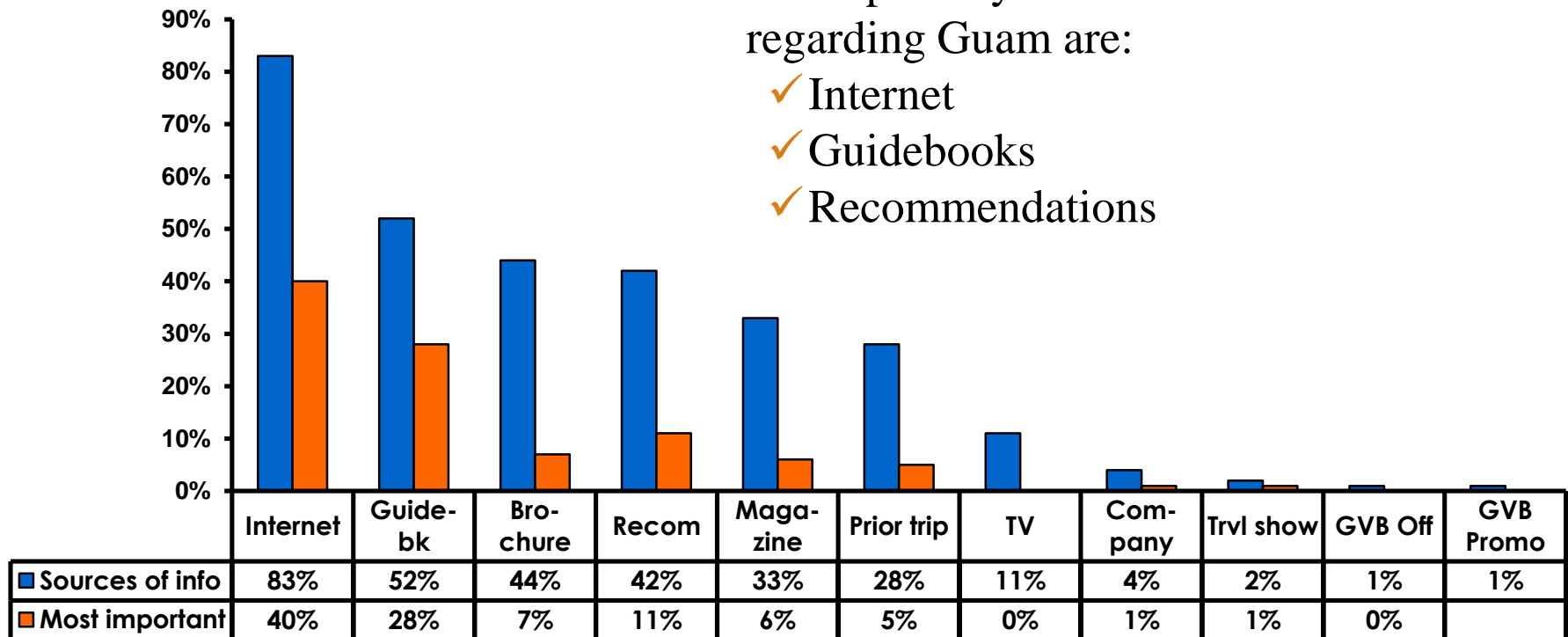


Travel Motivation- Info Sources



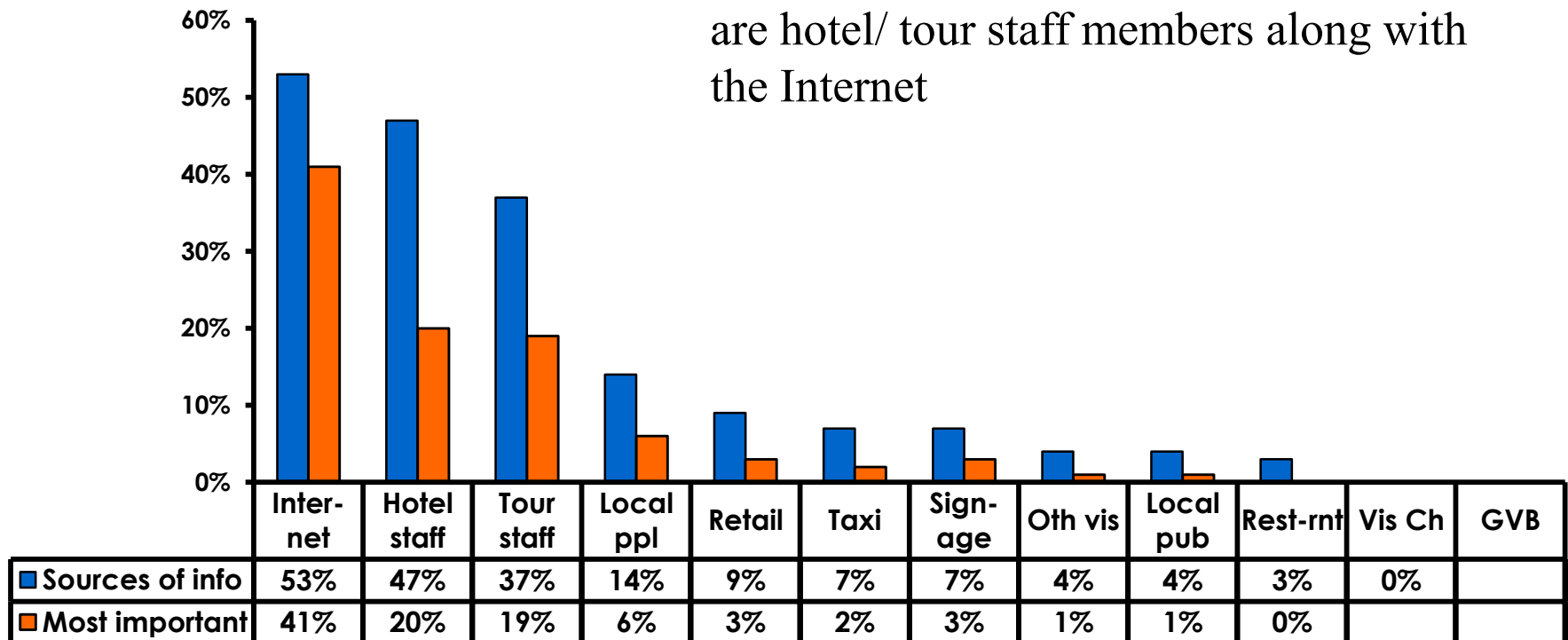
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

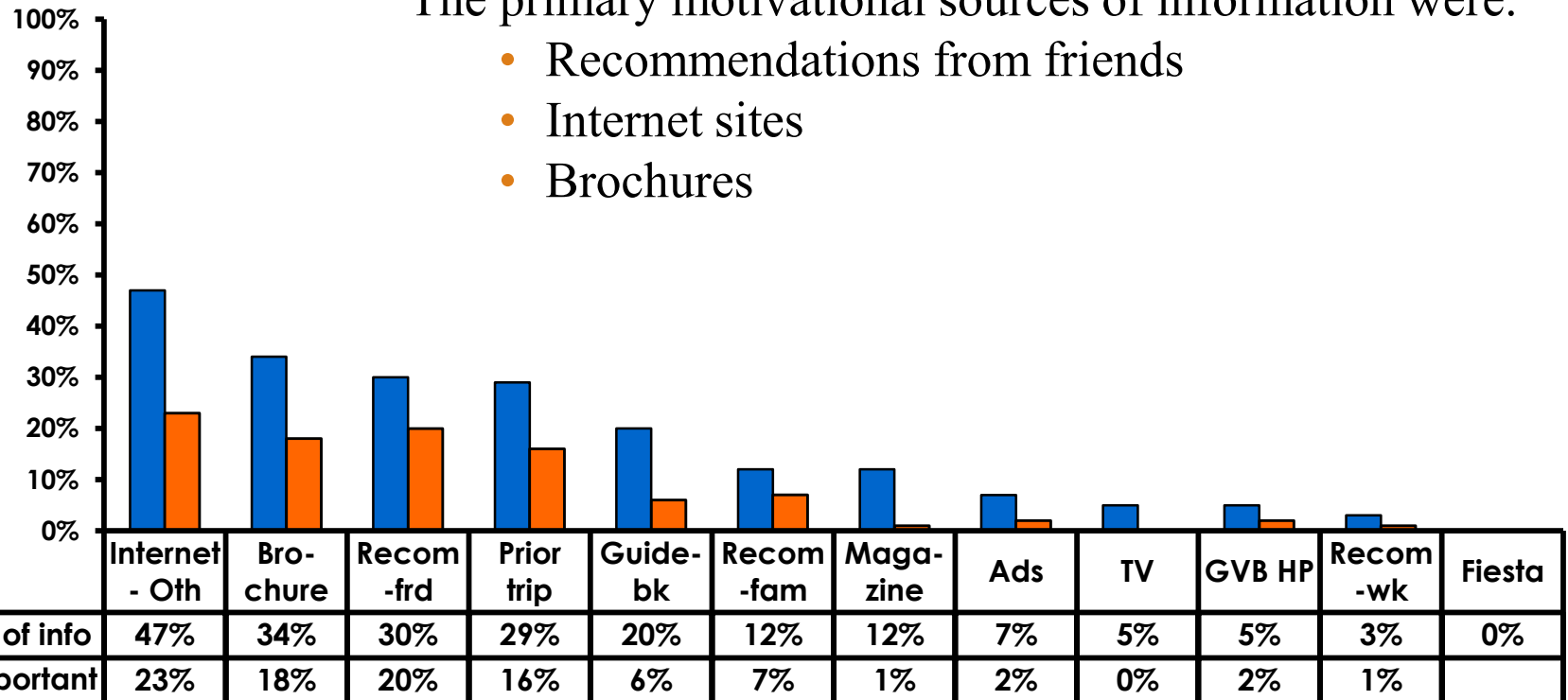
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

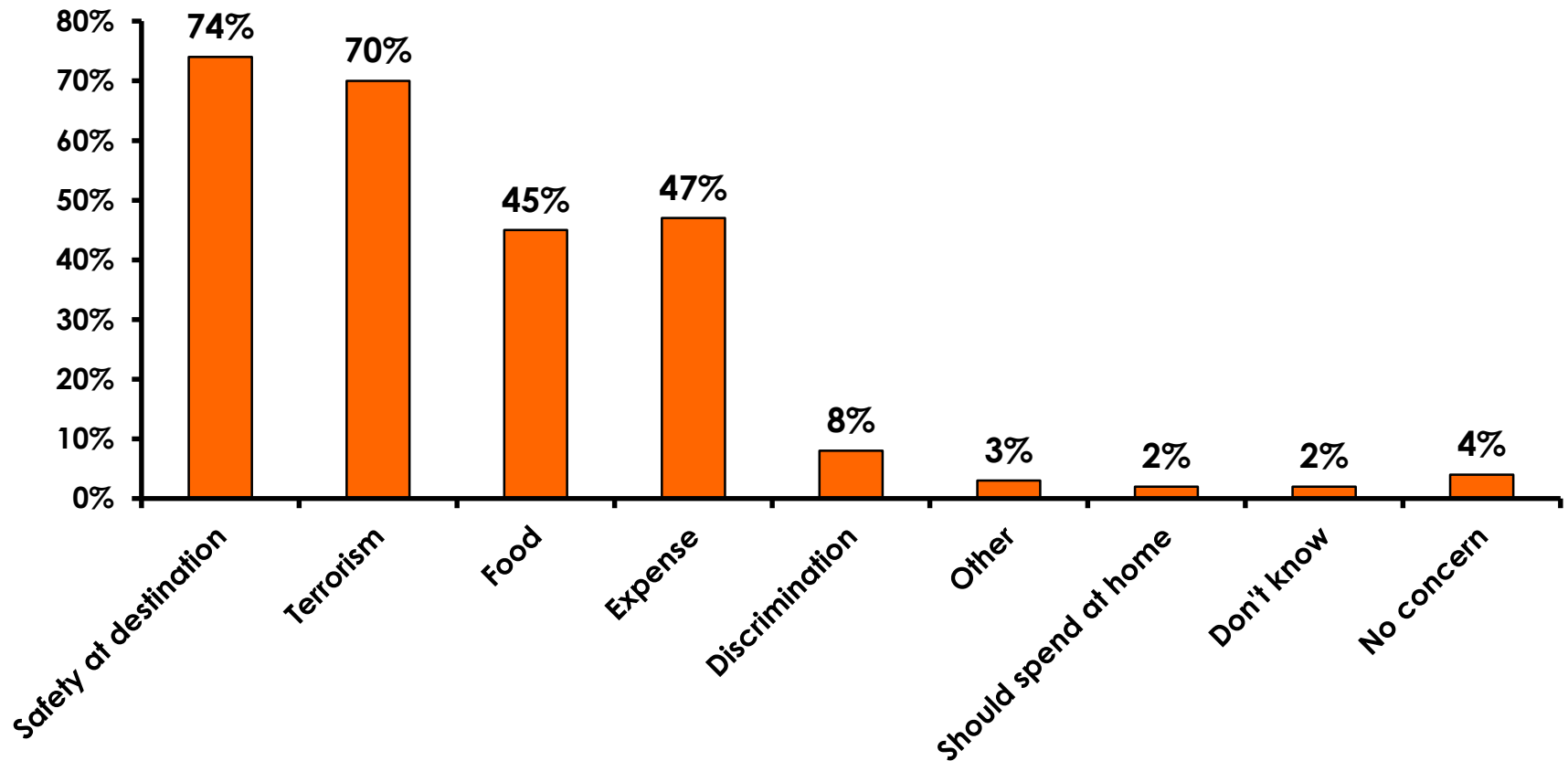
The primary motivational sources of information were.

- Recommendations from friends
- Internet sites
- Brochures



SECTION 6 **OTHER ISSUES**

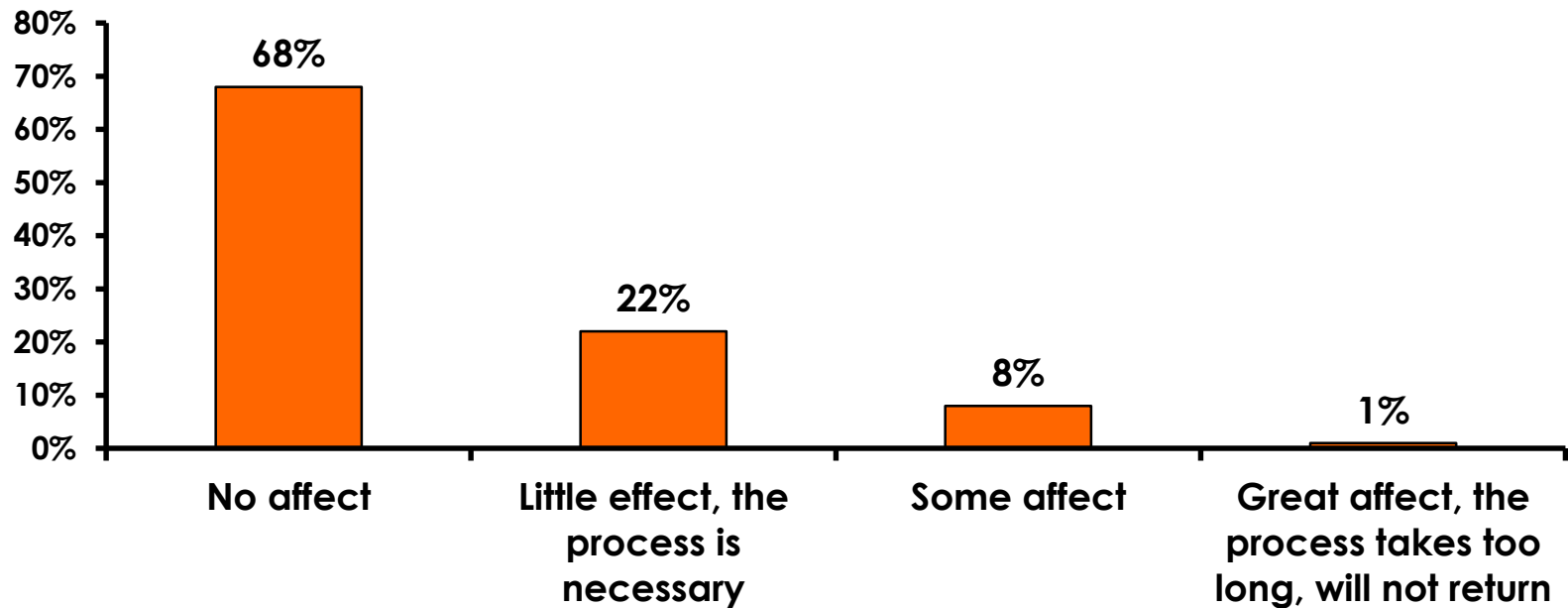
Concerns about travel outside of Japan - Overall



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	Safety	74%	70%	78%	75%	88%	68%	67%	71%	70%	71%	87%	80%	80%	
	Terrorism	70%	66%	73%	74%	80%	73%	78%	68%	72%	65%	72%	76%	80%	
	Expense	47%	45%	47%	51%	52%	50%	44%	50%	49%	52%	44%	43%	80%	
	Food	45%	39%	52%	47%	56%	45%	48%	64%	47%	48%	46%	30%	80%	
	Discrimination against Japanese	8%	7%	7%	9%	8%	5%	19%	7%	5%	6%	5%	9%		
	No concerns	4%	5%	1%	7%		5%	4%	7%	5%	5%		7%	20%	
	Other	3%	3%	2%	2%			7%		2%	3%		2%		
	Don't know	2%	4%						4%						
	Should spend at home	2%	2%	2%	2%			4%		2%	2%	3%	4%		
	Total	Count	346	178	85	57	25	22	27	28	43	63	39	46	5

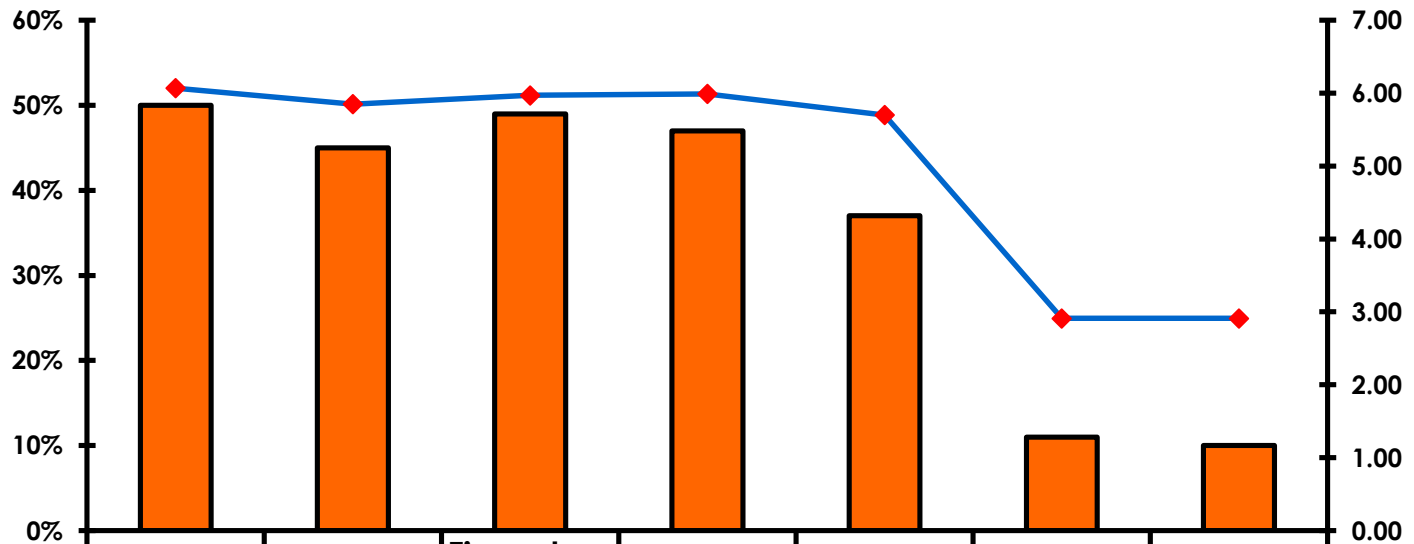
Security Screening/ Immigration Process at Guam International Airport





Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



 Strongly agree	50%	45%	49%	47%	37%	11%	10%
 MEAN	6.07	5.85	5.97	5.99	5.70	2.91	2.91