



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2016

DECEMBER 2015



Prepared by: QMark Research

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Background & Methodology

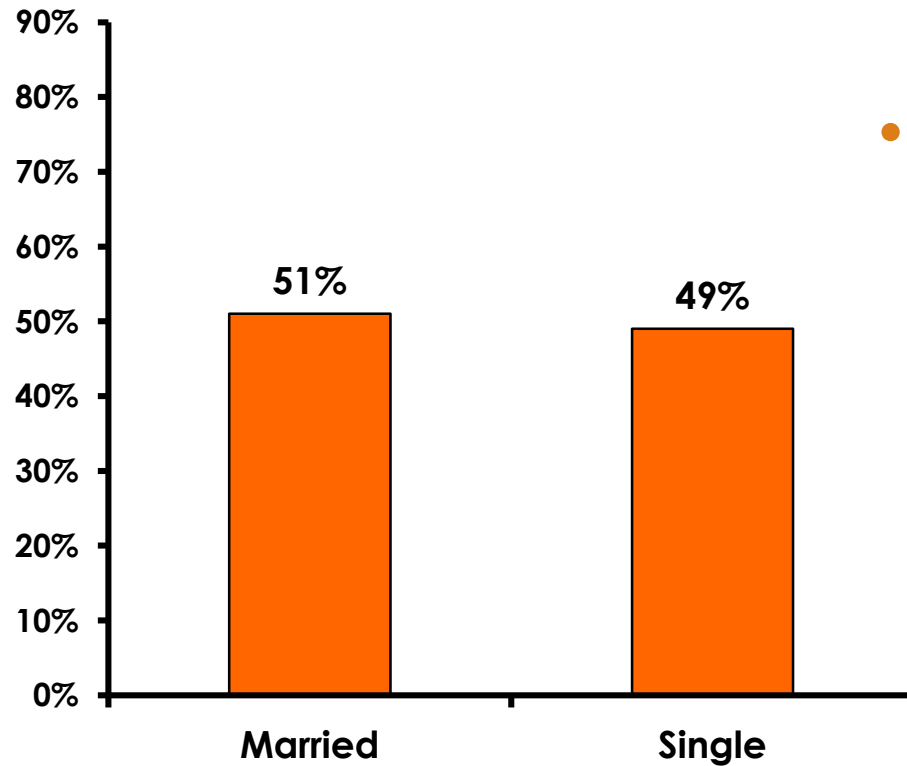
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **356** departing 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 **356** 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.

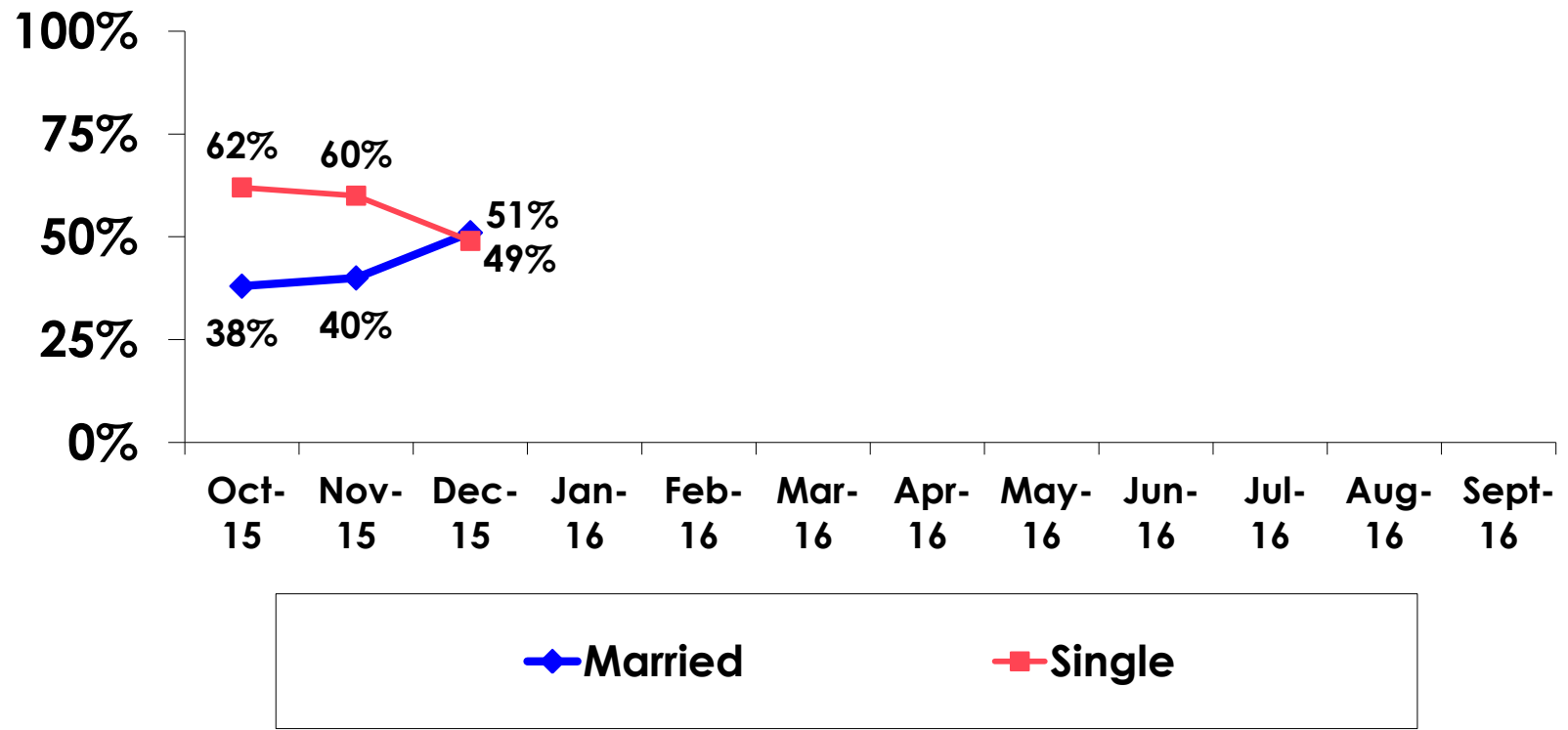
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

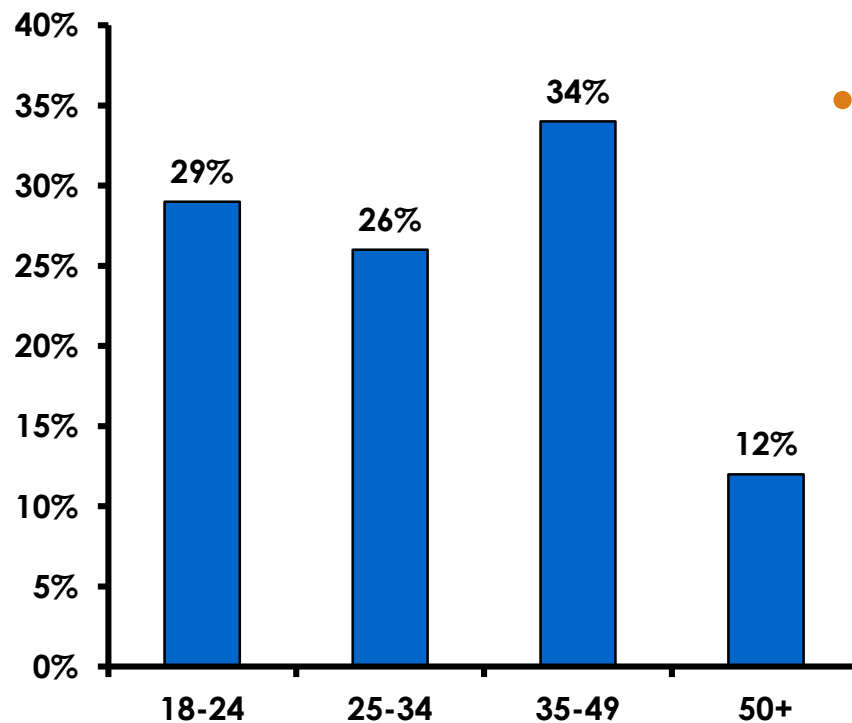


- 62% of 1ST time visitors are single.

MARITAL STATUS

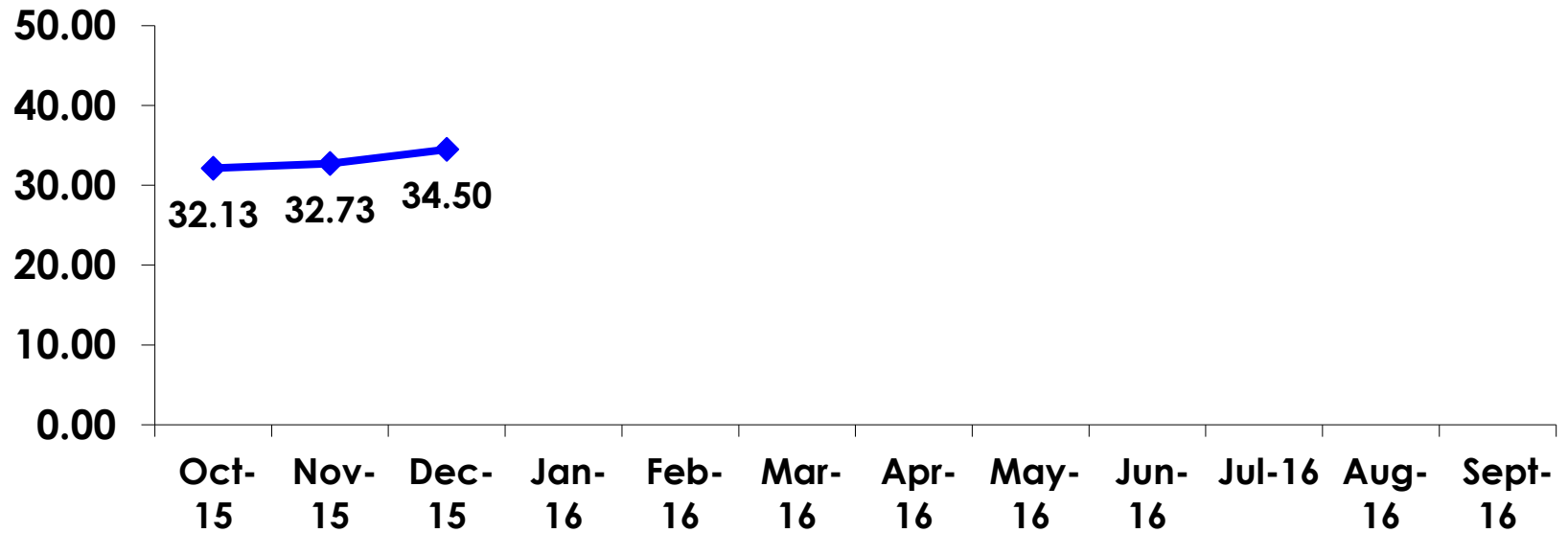


Age - Overall

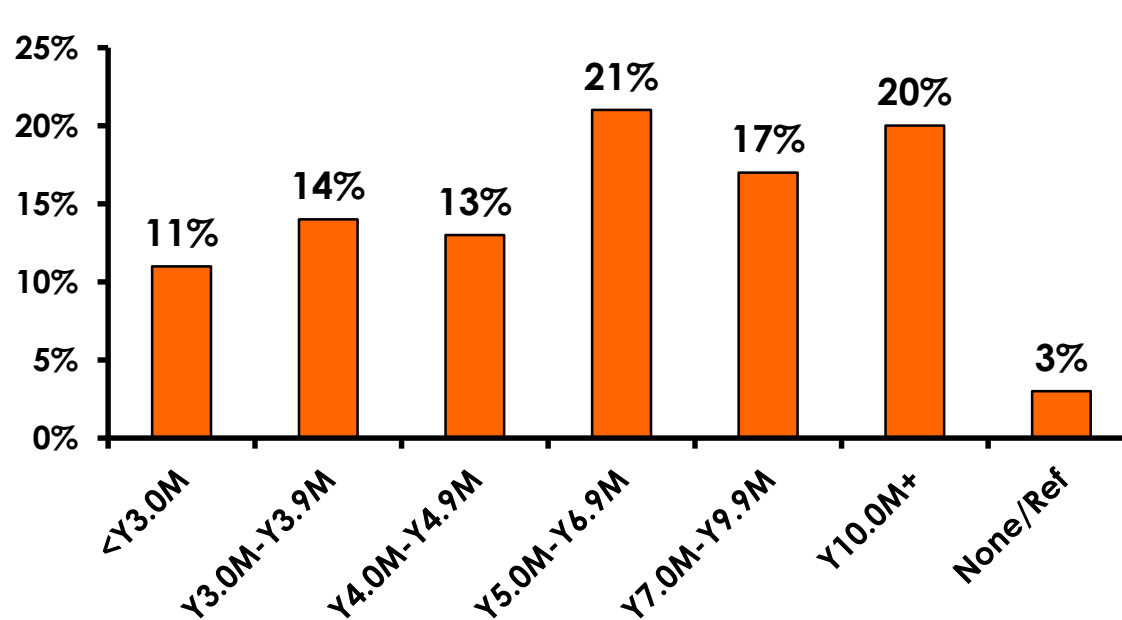


- The average age of the respondents is 34.50 years of age.

AVERAGE - AGE

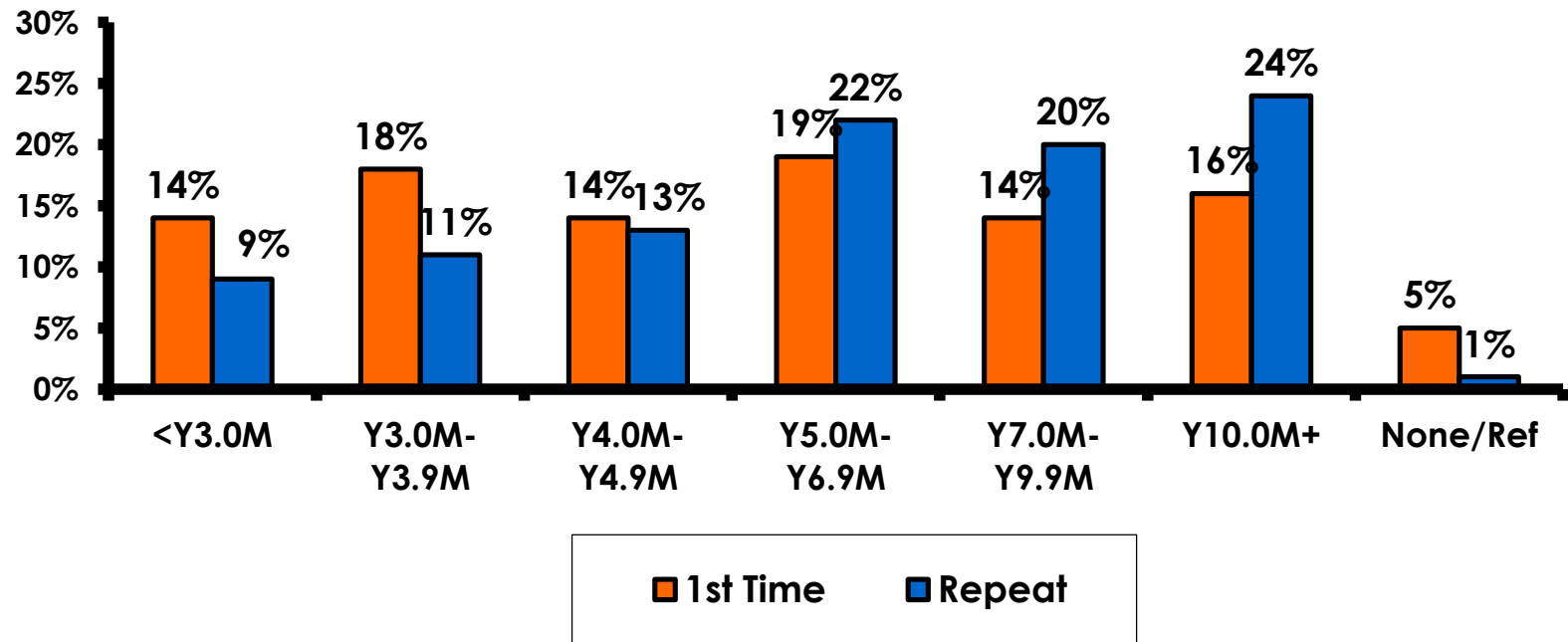


Personal Income



• ¥121.58=\$1

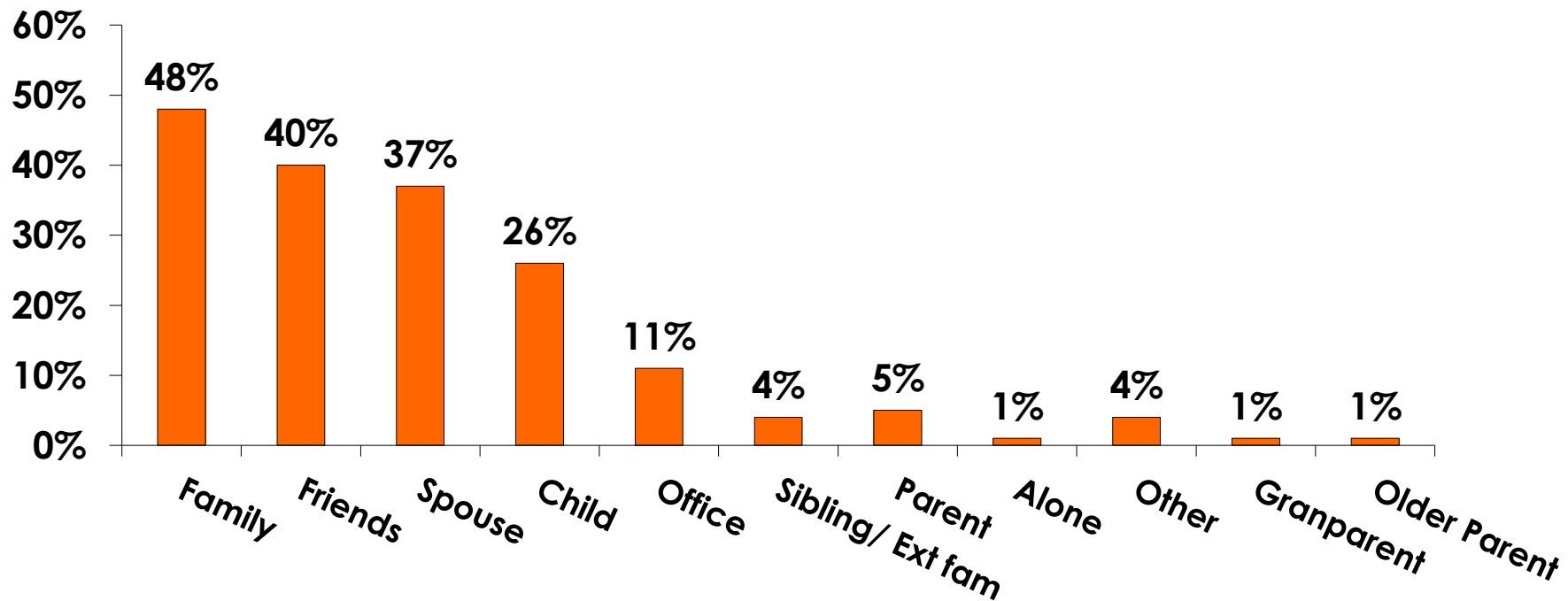
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	11	5	6	8	2		1
		Column N %	3%	3%	4%	11%	2%		2%
Y2.0M-Y3.0M	Y2.0M-Y3.0M	Count	25	6	19	12	8	4	1
		Column N %	8%	3%	13%	16%	9%	4%	2%
Y3.0M-Y4.0M	Y3.0M-Y4.0M	Count	45	18	27	12	16	12	4
		Column N %	14%	10%	19%	16%	19%	11%	10%
Y4.0M-Y5.0M	Y4.0M-Y5.0M	Count	43	24	19	6	20	13	4
		Column N %	13%	14%	13%	8%	24%	12%	10%
Y5.0M-Y7.0M	Y5.0M-Y7.0M	Count	68	43	25	11	19	25	11
		Column N %	21%	25%	17%	14%	22%	22%	26%
Y7.0M-Y10.0M	Y7.0M-Y10.0M	Count	55	39	16	4	12	30	9
		Column N %	17%	22%	11%	5%	14%	27%	21%
Y10.0M+	Y10.0M+	Count	64	33	31	19	5	28	11
		Column N %	20%	19%	21%	25%	6%	25%	26%
No Income	No Income	Count	9	7	2	4	3	1	1
		Column N %	3%	4%	1%	5%	4%	1%	2%
Total	Total	Count	320	175	145	76	85	113	42

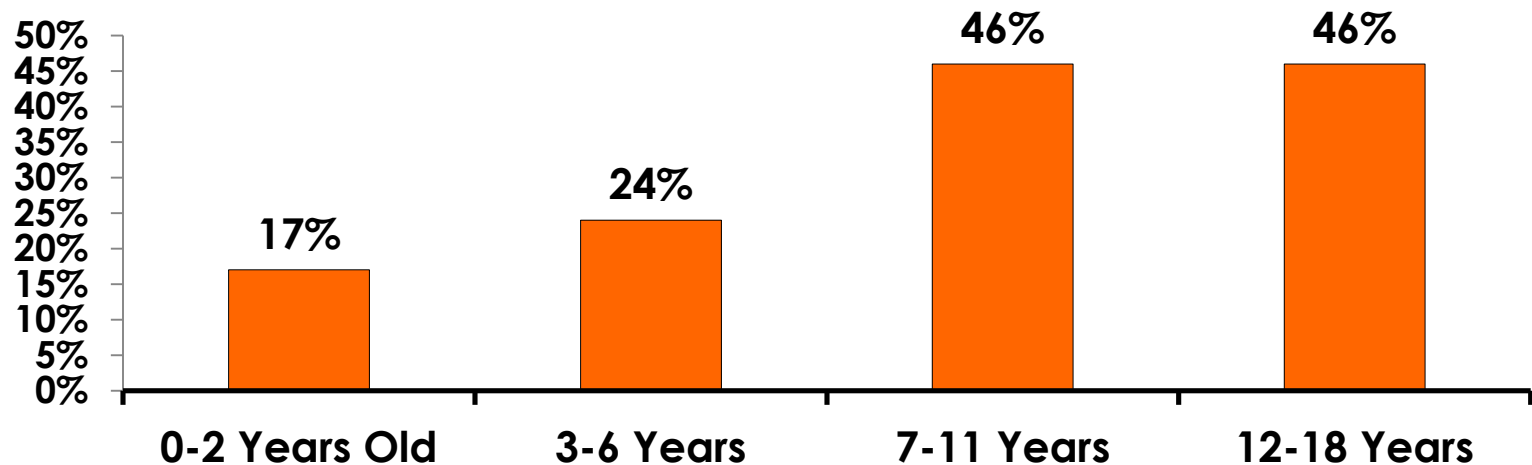
Travel Companions



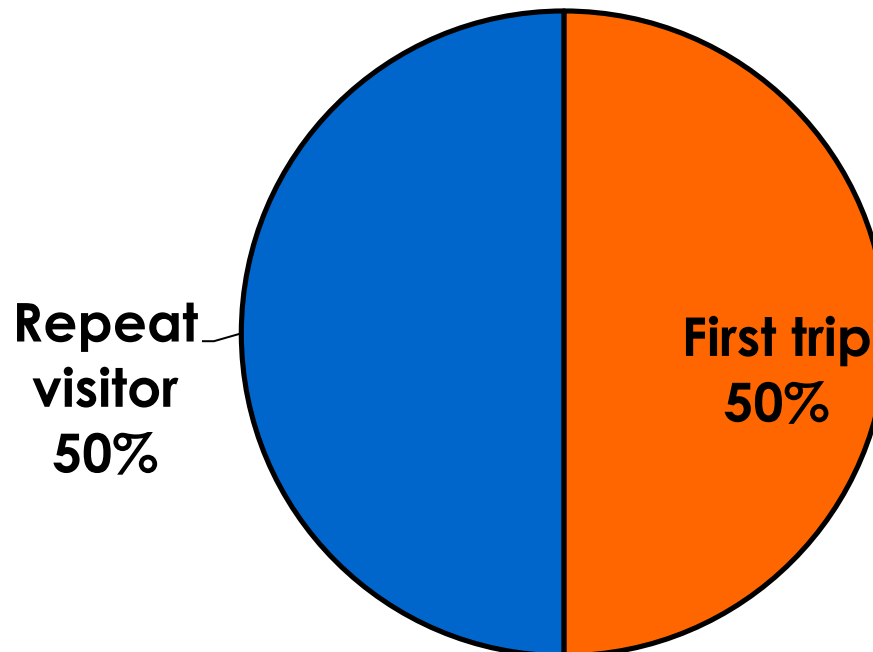
Number of Children Travel Party

N=92 total respondents traveling with children.

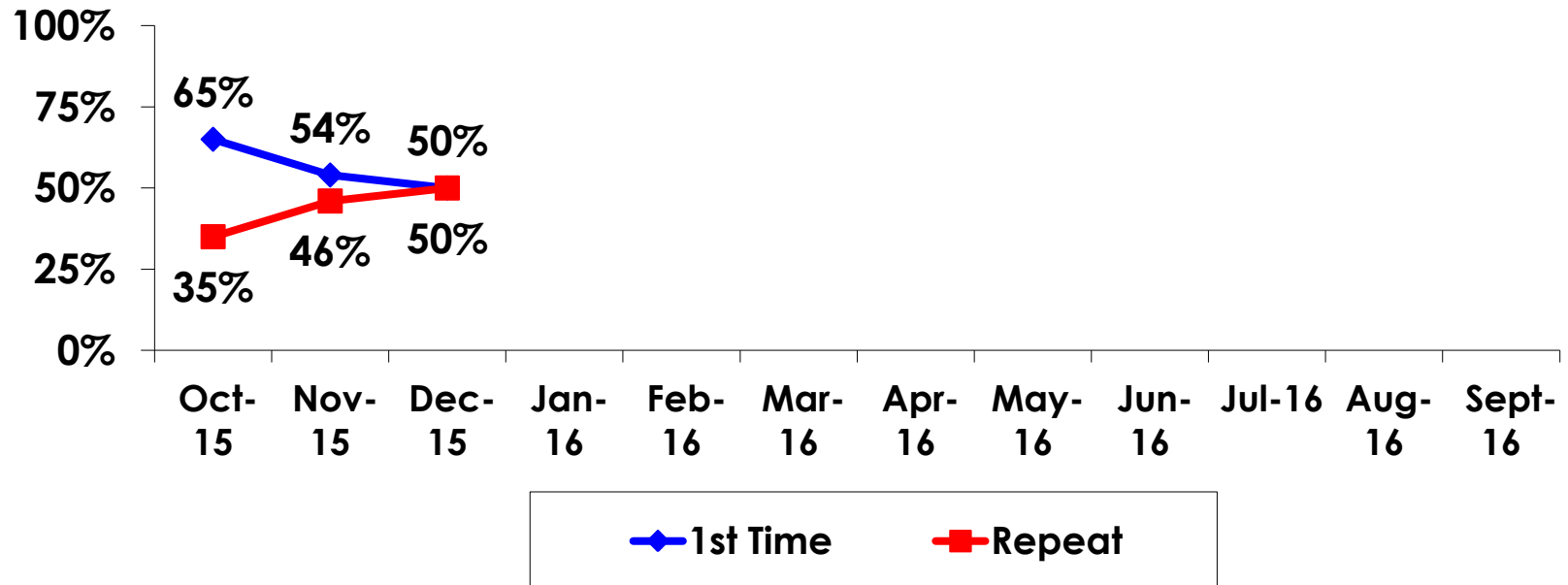
(Of those N=92 respondents, there is a total of 140 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



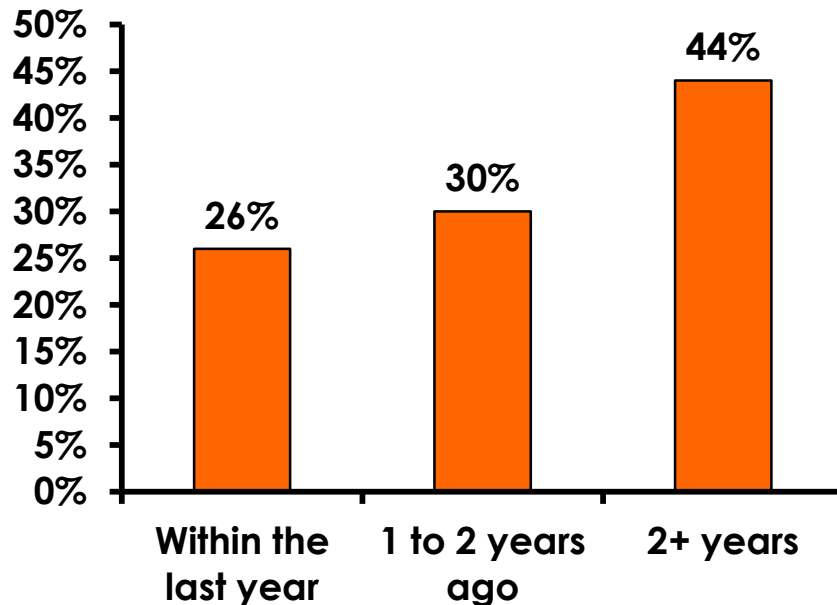
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	182	89	92	
		Column N %	51%	50%	52%	
	Female	Count	174	89	85	
		Column N %	49%	50%	48%	
Total		Count	356	178	177	
AGE	18-24	Count	101	65	36	
		Column N %	29%	37%	20%	
	25-34	Count	91	58	32	
		Column N %	26%	33%	18%	
	35-49	Count	118	39	79	
		Column N %	34%	22%	45%	
	50+	Count	42	13	29	
		Column N %	12%	7%	16%	
	Total		Count	352	175	176

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

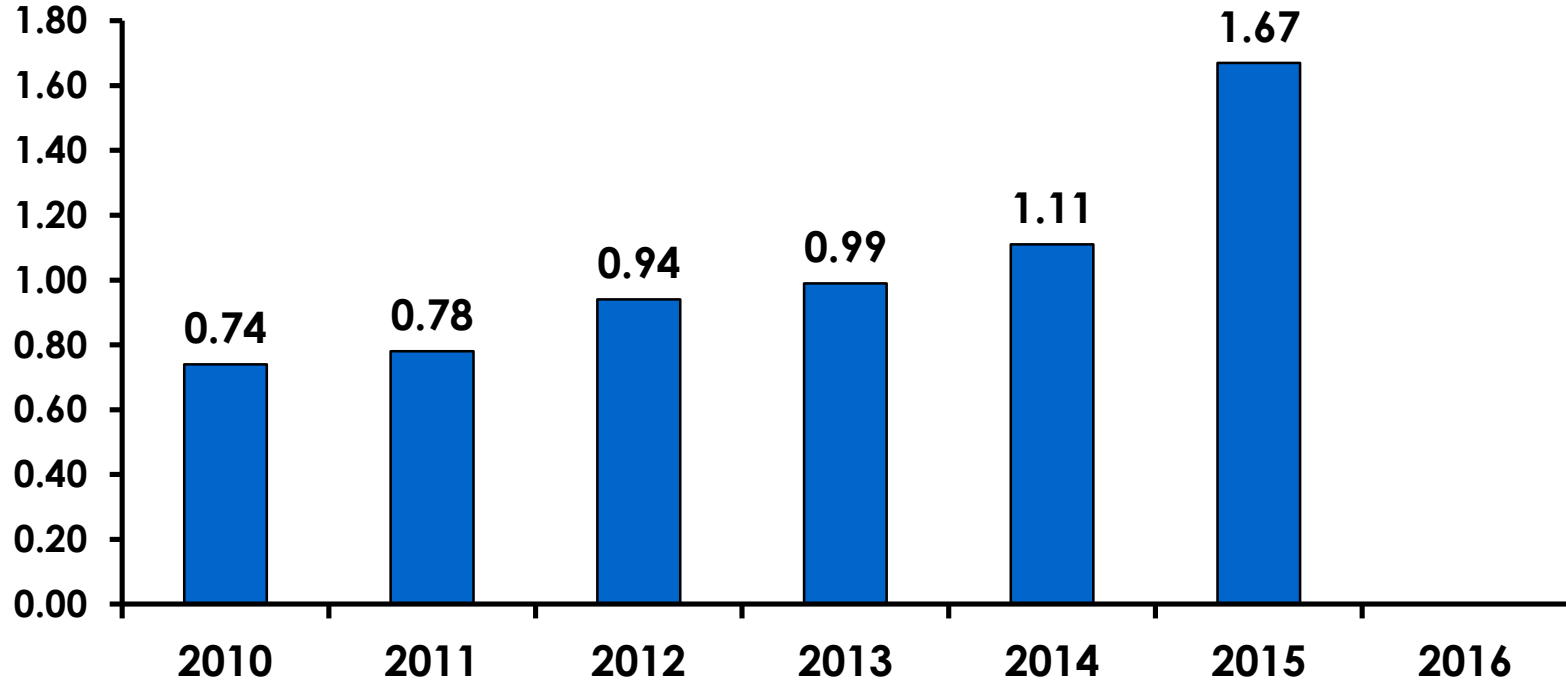
Repeat Visitors Last Trip

n = 173



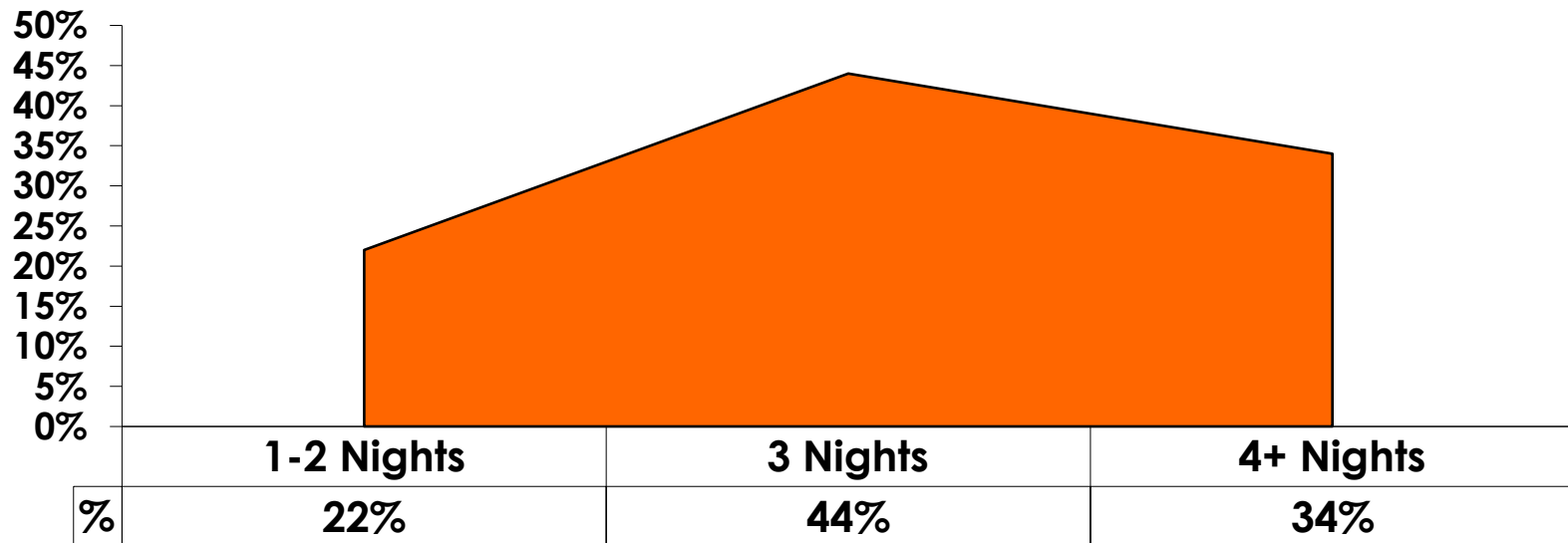
- The average repeat visitor has been to Guam 3.51 times.

Average Number Overnight Trips (2010-2015) (2 nights or more)

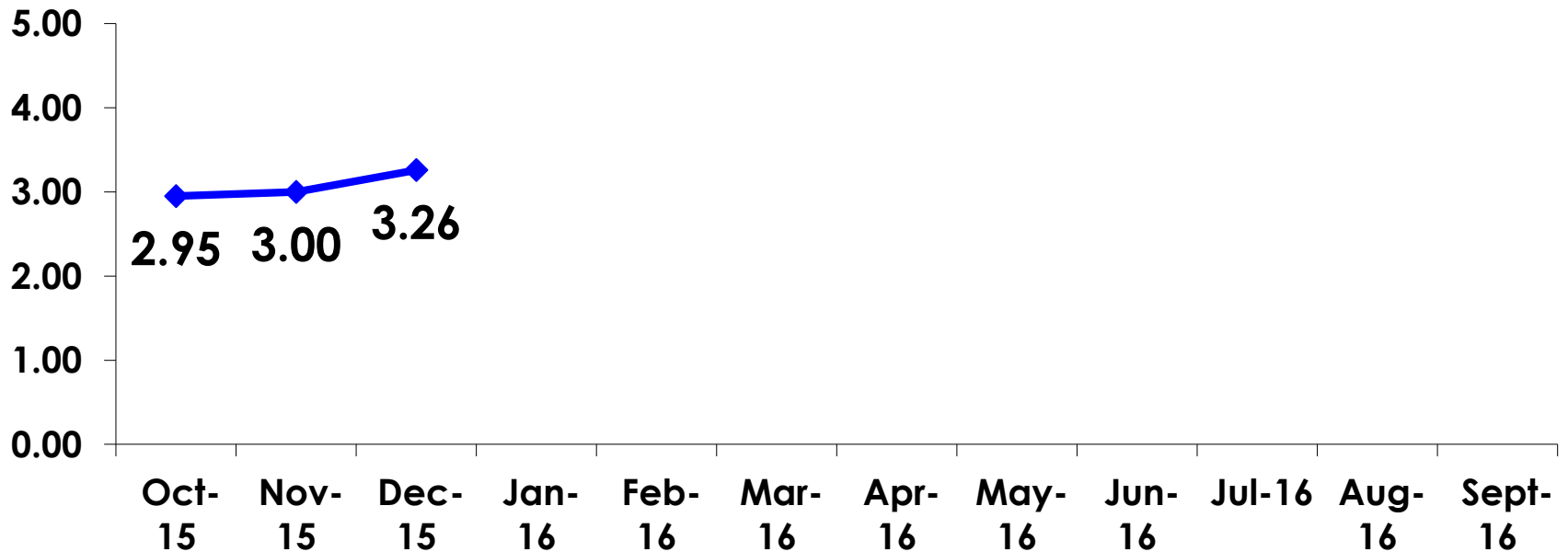


Length of Stay

Mean = 3.26 Days
Median = 3.0 Days



AVG LENGTH OF STAY

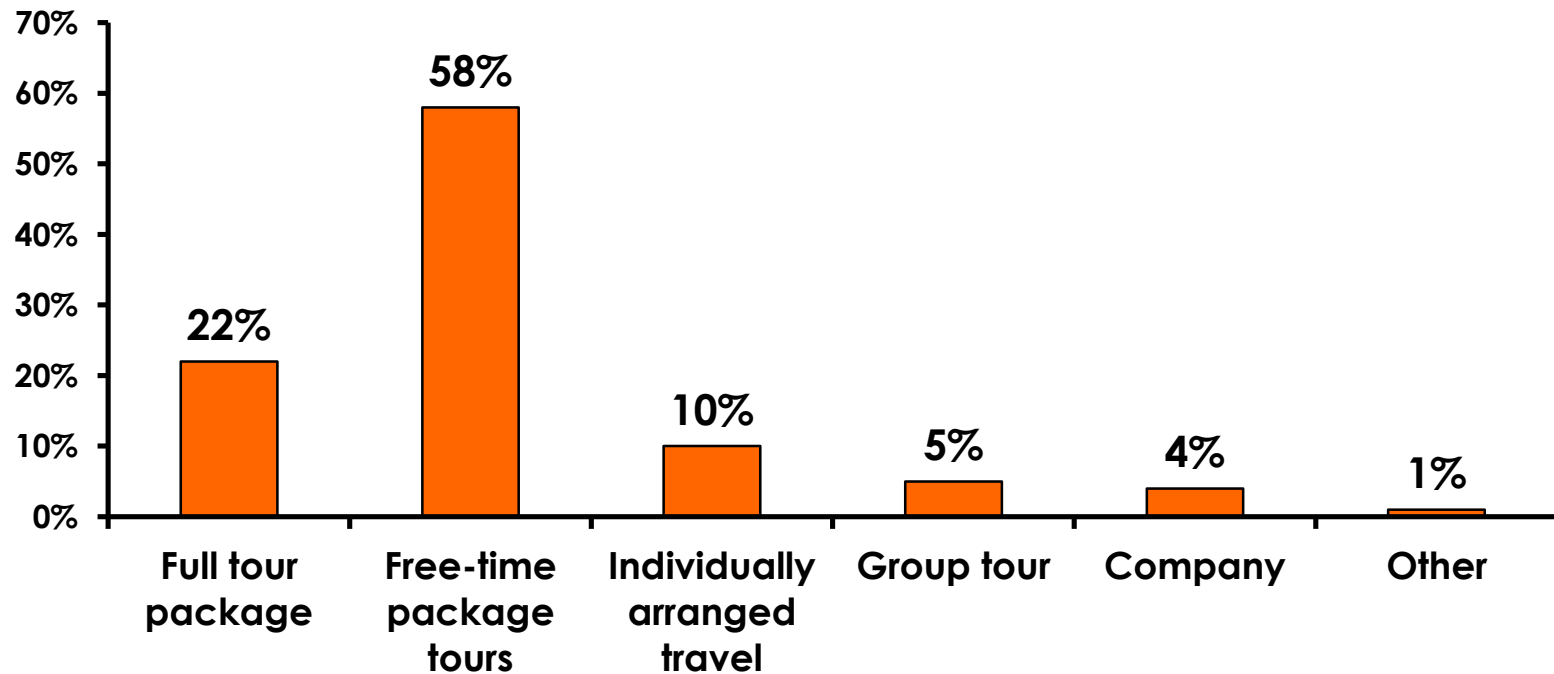


Occupation by Income

		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	Engineer	16%	9%	16%	20%	26%	15%	13%	13%	33%	
	Office worker non-mgr	16%	27%	16%	14%	16%	13%	24%	8%		
	Student	14%	55%	20%	5%	9%	7%	4%	14%	44%	
	Salesperson	11%		12%	9%	12%	25%	9%	9%		
	Manager	8%			7%	5%	4%	16%	16%		
	Homemaker	6%	9%		5%	7%	9%	9%	8%		
	Teacher	5%		4%	9%		12%	5%	5%		
	Self-employed	5%			5%	5%	6%	5%	9%		
	Other	4%		16%	2%	2%	3%	2%	3%		
	Skilled worker	3%		8%	7%	7%		4%			
	Govt- office worker non-mgr	3%			11%	2%	3%	2%	3%		
	Unemployed	2%		4%	2%	5%	1%		2%		
	Professional/ Specialist	2%			2%	2%			3%	11%	
	Executive (30+ employees)	2%		4%					6%		
	Freeter	1%				2%		2%	2%		
	Retired	1%						2%		11%	
	Govt- Manager	1%						4%			
	Free-lancer	0%			2%						
	Total	Count	349	11	25	44	43	67	55	64	9

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

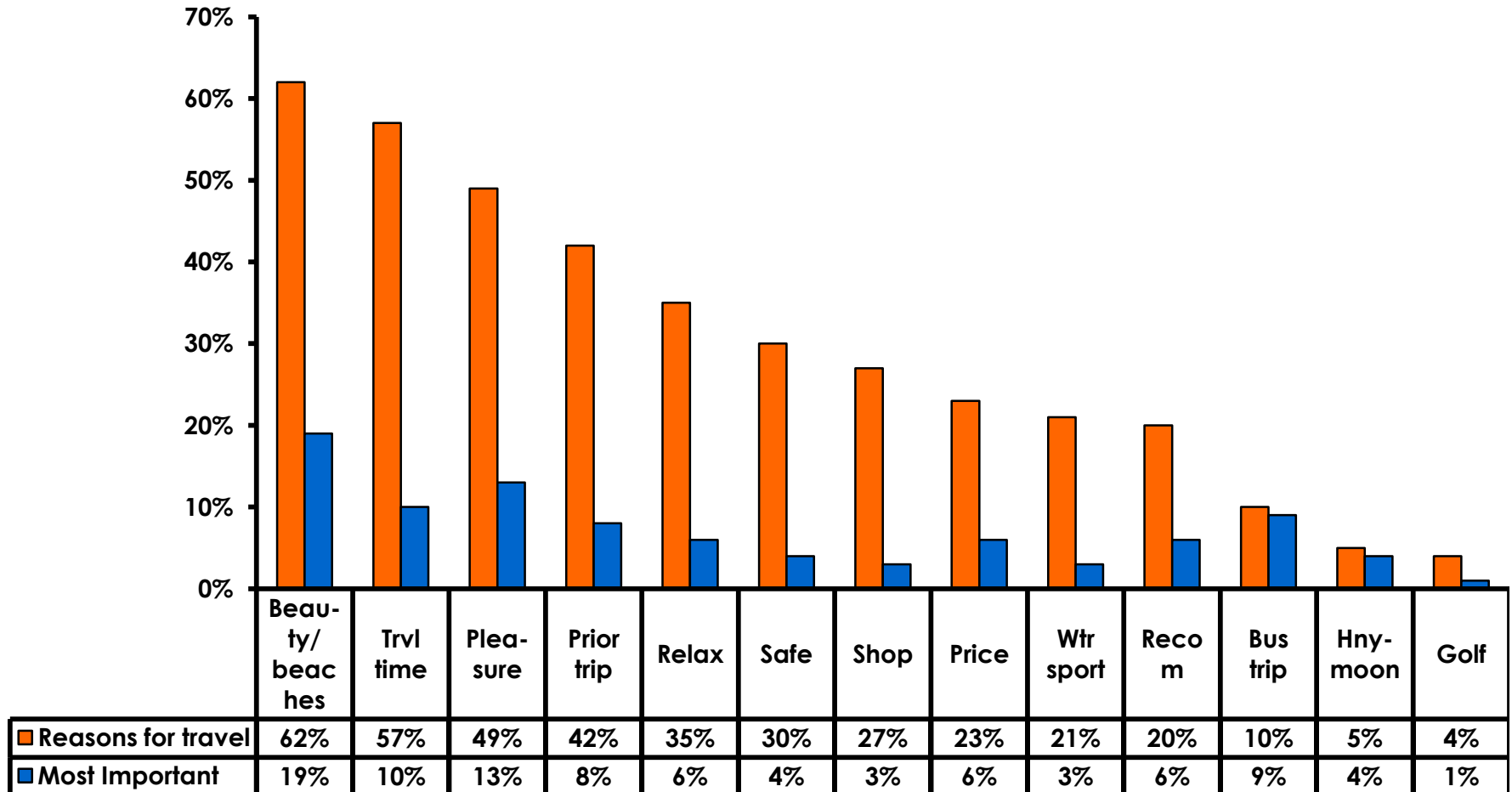


Accommodation by Income

Average length of stay: 3.26 days

		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+		
Q9	Guam Plaza Hotel	14%	45%	8%	11%	12%	16%	11%	13%	33%	
	Outrigger Guam Resort	11%	9%	21%	11%	9%	9%	13%	13%		
	Grand Plaza Hotel	10%	9%	13%	20%	9%	10%	5%	6%	11%	
	Royal Orchid Guam	8%	9%	8%	9%		10%	7%	8%		
	Fiesta Resort Guam	8%	9%	4%	9%	12%	7%	15%	5%		
	Guam Reef & Olive Spa	7%		8%	11%	14%	3%	5%	5%		
	PIC Club	6%		4%		7%	7%	4%	11%		
	Onward Beach Resort	5%			2%	7%	3%	9%	8%		
	Hilton Guam Resort	5%			7%	2%	3%	5%	5%		
	Pacific Star Resort & Spa	5%	9%	8%	4%	12%	4%	2%	2%		
	Westin Resort Guam	4%		4%	4%	2%	1%	5%	6%	11%	
	Hotel Nikko Guam	3%		4%	4%	5%	4%	2%	2%		
	Holiday Resort Guam	3%				5%	3%	7%	2%	11%	
	Leo Palace Resort	3%		8%		2%	4%	4%		22%	
	Pacific Bay Hotel	3%		8%	2%				3%		
	Sheraton Laguna Guam	2%					6%	2%	2%		
	Hyatt Regency Guam	2%	9%				1%	2%	3%	11%	
	Oceanview Hotel	1%			4%				3%		
	Other	1%				2%	1%	2%			
	Lotte Hotel Guam	1%							5%		
	Dusit Thani Guam	0%					1%				
	Hotel Santa Fe	0%							2%		
	Aqua Suites	0%					1%				
	Condo	0%					1%				
	Total	Count	355	11	24	45	43	68	55	64	9

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

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

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	62%	65%	58%	58%	69%	61%	63%	
	Short travel time	57%	53%	50%	62%	69%	59%	56%	
	Pleasure	49%	51%	46%	45%	62%	47%	52%	
	Previous trip	42%	26%	30%	61%	57%	44%	40%	
	Relax	35%	27%	36%	36%	45%	36%	33%	
	Safe	30%	25%	22%	34%	50%	36%	24%	
	Shopping	27%	33%	21%	27%	31%	18%	37%	
	Price	23%	28%	17%	16%	45%	19%	28%	
	Water sports	21%	22%	22%	19%	29%	20%	23%	
	Recomm- friend/family/trvl agnt	20%	23%	23%	14%	19%	15%	24%	
	Company/ Business Trip	10%	16%	11%	7%	2%	11%	9%	
	Honeymoon	5%	2%	14%	2%		8%	1%	
	Golf	4%		7%	3%	7%	4%	3%	
	Scuba	4%	5%	4%	1%	5%	4%	3%	
	Married/ Attn wedding	3%	1%	10%	2%		6%	1%	
	Visit friends/ Relatives	2%	5%	2%	1%		2%	2%	
	Company Sponsored	2%		1%	3%	2%	3%		
	Other	1%		2%	2%	2%	1%	2%	
	Organized sports	1%	1%	1%	2%	2%	2%	1%	
	Career Cert/ Testing	1%		2%	1%		2%		
	Total	Count	355	101	90	118	42	181	174

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	62%	64%	56%	44%	65%	63%	62%	70%	44%
	Short travel time	57%	36%	48%	42%	63%	66%	51%	73%	44%
	Pleasure	49%	45%	56%	40%	49%	55%	45%	53%	33%
	Previous trip	42%	36%	32%	33%	40%	52%	51%	50%	22%
	Relax	35%	18%	36%	29%	35%	37%	36%	42%	33%
	Safe	30%	36%	28%	24%	26%	39%	35%	36%	33%
	Shopping	27%	36%	40%	33%	23%	22%	22%	34%	33%
	Price	23%	18%	32%	27%	19%	28%	16%	20%	22%
	Water sports	21%	9%	24%	11%	28%	21%	24%	30%	11%
	Recomm- friend/family/trvl agnt	20%	36%	32%	22%	16%	22%	7%	14%	11%
	Company/ Business Trip	10%	18%	24%	16%	7%	3%	9%	6%	22%
	Honeymoon	5%		8%	11%	7%	6%	2%	2%	11%
	Golf	4%	9%	4%	2%	5%	3%	11%		
	Scuba	4%			2%		3%	5%	6%	
	Married/ Attn wedding	3%			4%	5%	7%	4%		
	Visit friends/ Relatives	2%			2%	2%	3%		5%	11%
	Company Sponsored	2%			4%		1%	5%		
	Other	1%		4%			1%	4%	2%	
	Organized sports	1%		4%	2%				3%	11%
	Career Cert/ Testing	1%			2%		3%			
	Total Count	355	11	25	45	43	67	55	64	9

SECTION 3 **EXPENDITURES**

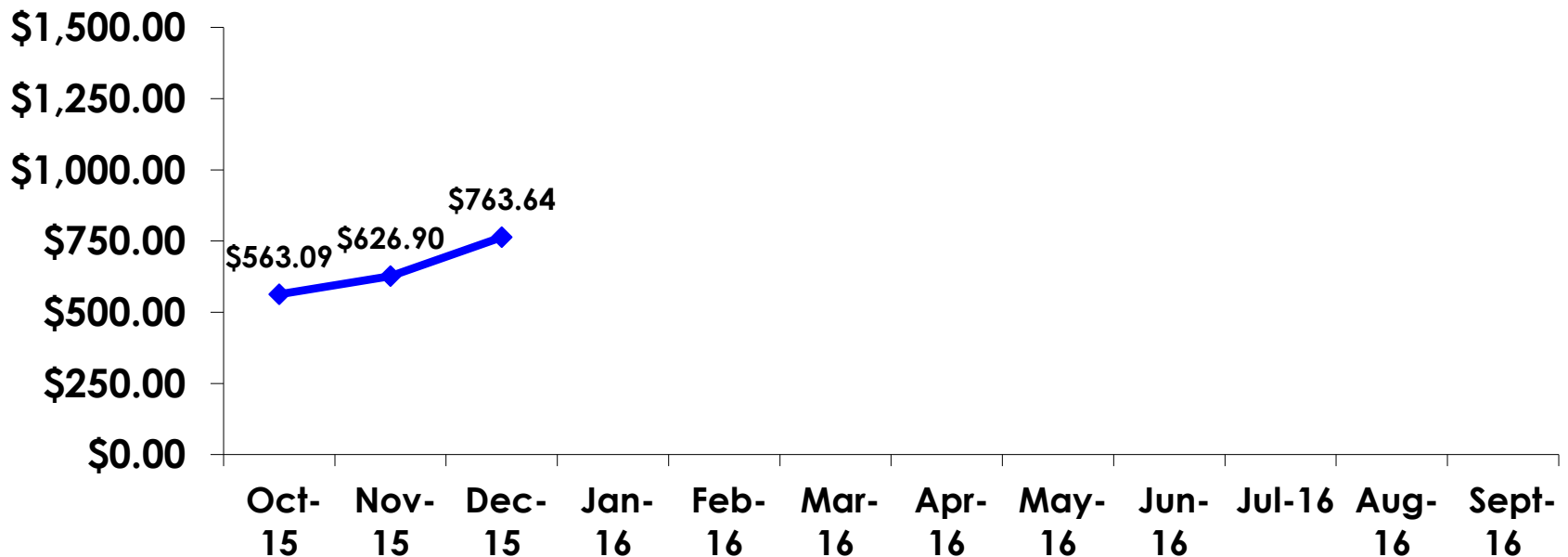
Prepaid Expenditures

¥121.58/US\$1

- \$1,704.30 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$28,788 = maximum (highest amount recorded for the entire sample)
- \$763.64 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$651.74

Breakdown of Prepaid Expenditures

¥121.58=\$1

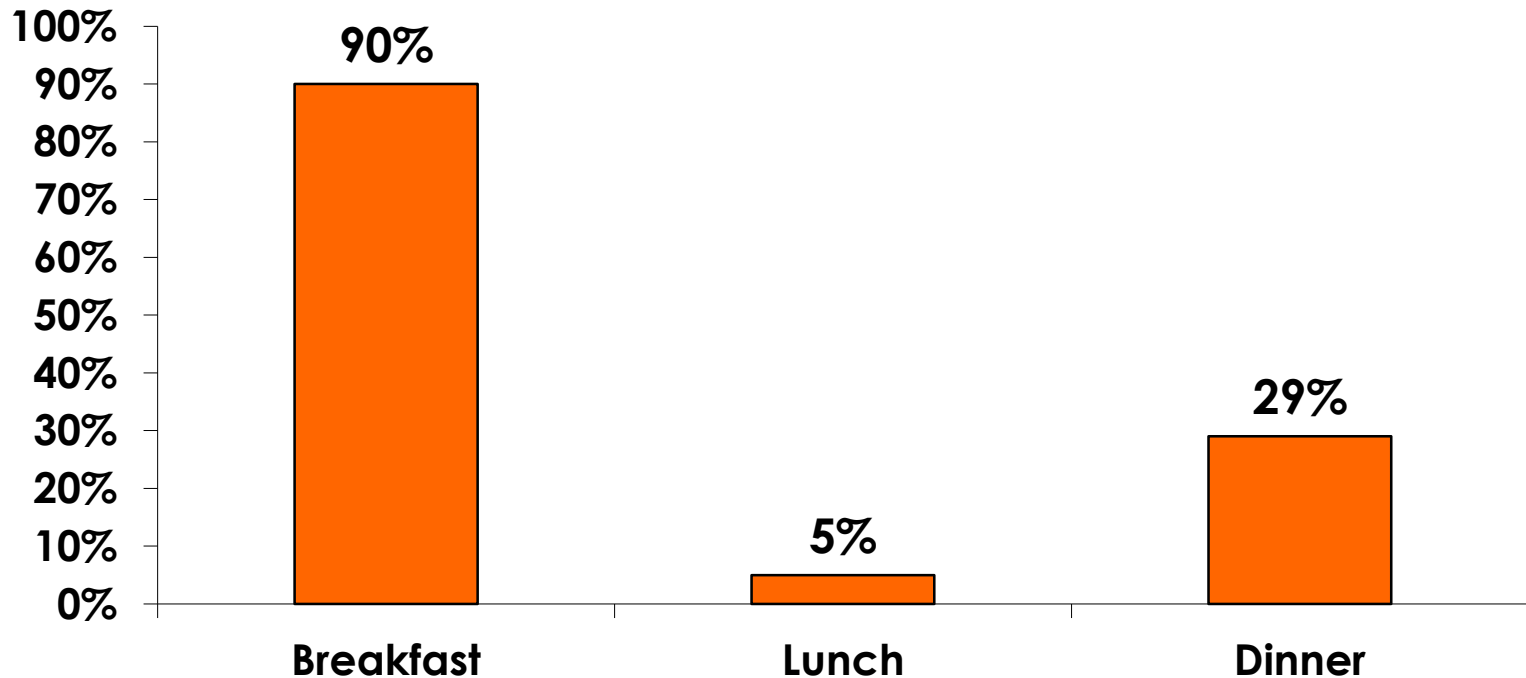
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,742.55
Air & Accommodation w/ daily meal package	\$3,515.31
Air only	\$1,635.38
Accommodation only	\$1,090.46
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$41.13
Ground transportation – Japan	\$55.29
Ground transportation – Guam	\$37.15
Optional tours/ activities	\$256.88
Other expenses	\$354.66
Total Prepaid	\$1,704.30

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=21

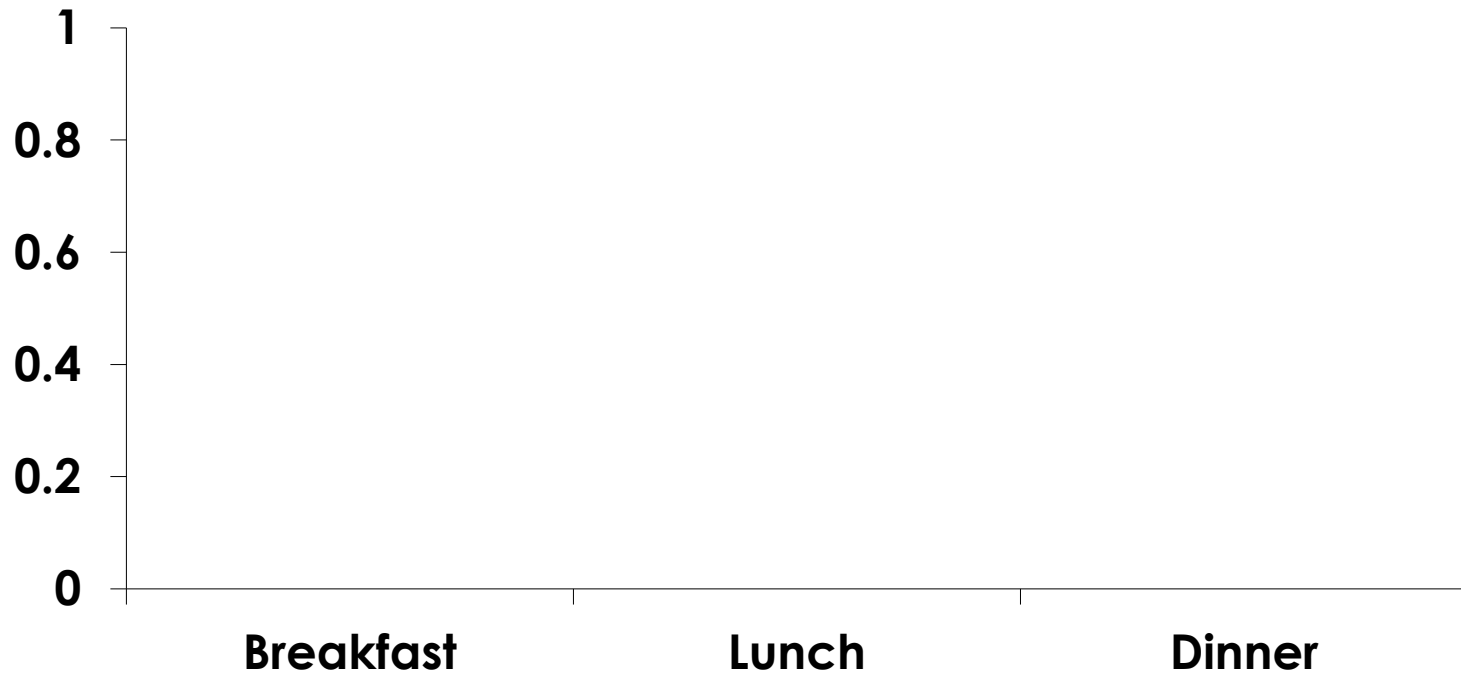


Mean=\$3,515.31 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

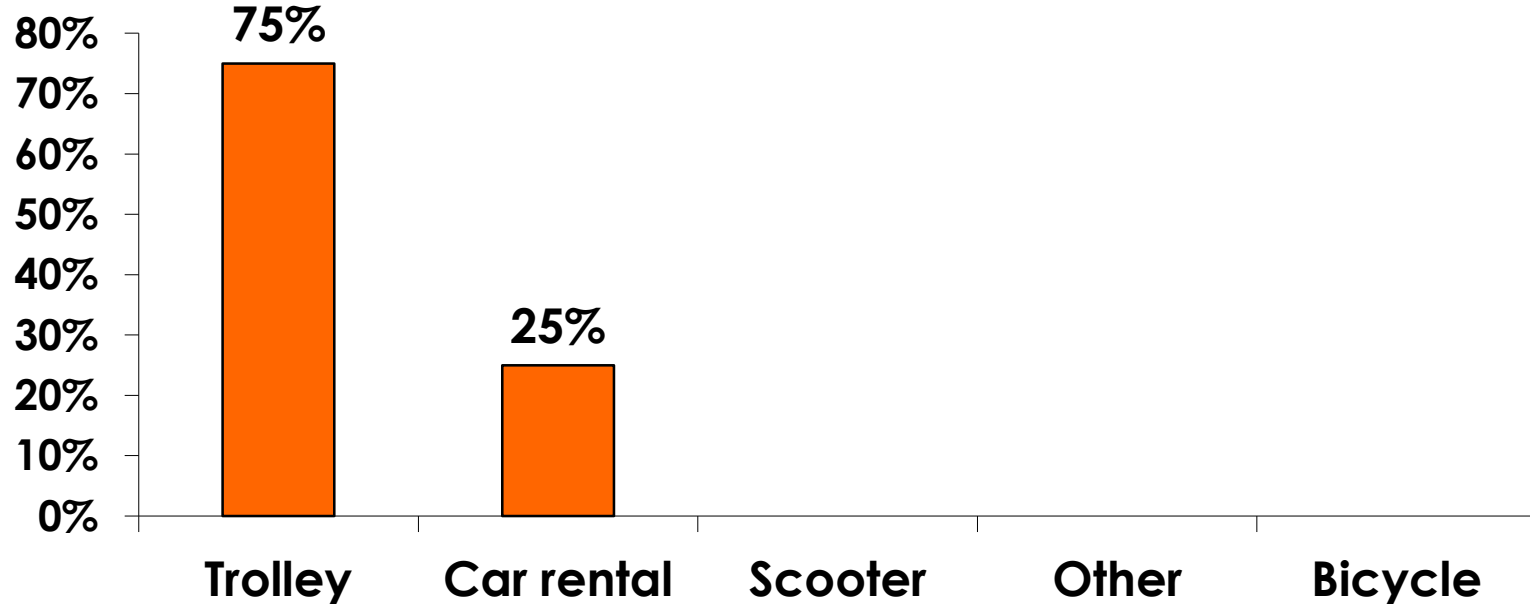
n=X



Mean=\$xx.xx per travel party

PREPAID GROUND TRANSPORTATION

n=12



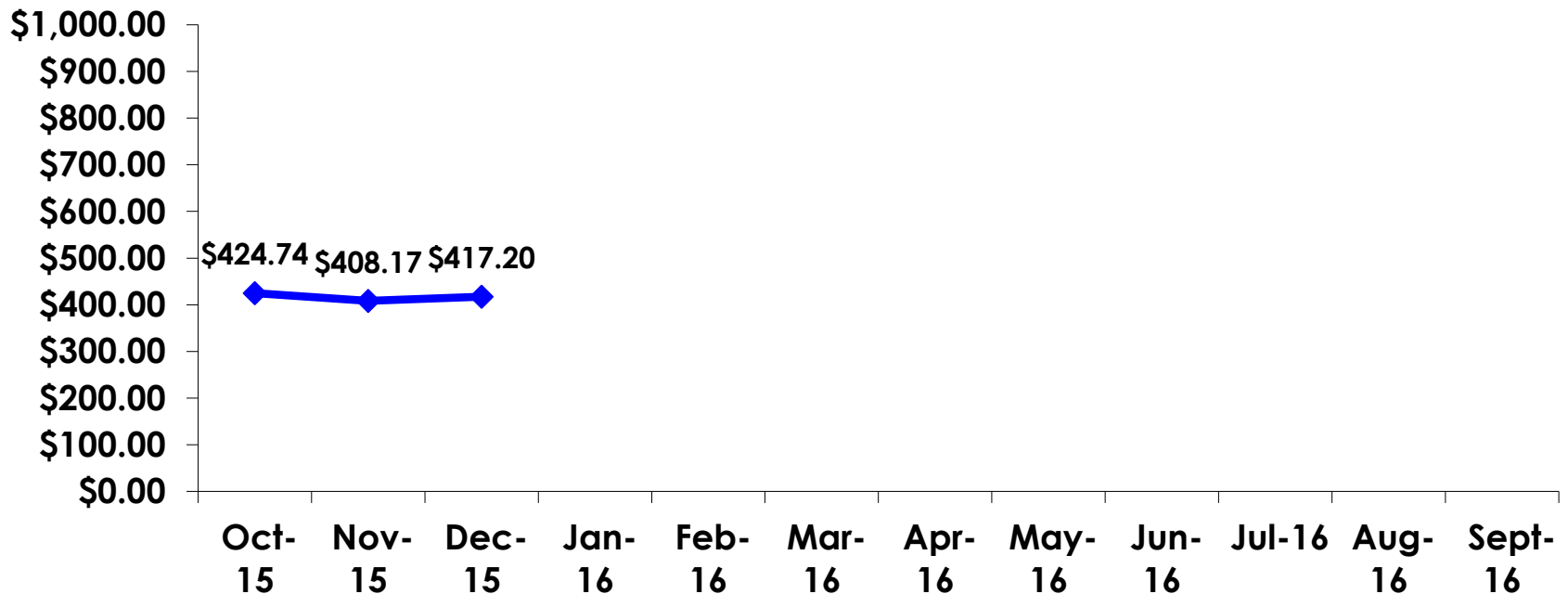
Mean=\$37.15 per travel party

On-Island Expenditures

- \$748.05 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,500 = Maximum (highest amount recorded for the entire sample)
- \$417.20 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

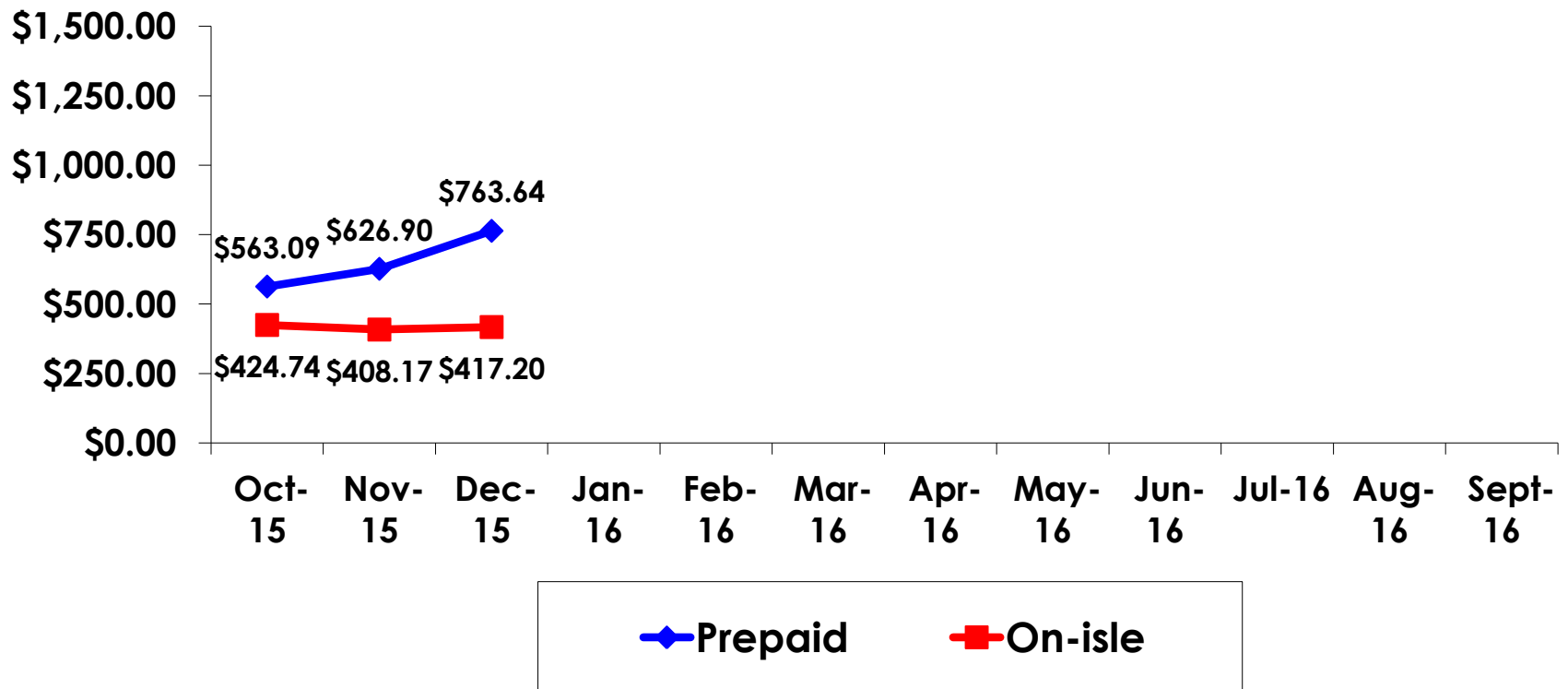


YTD = \$416.71

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$651.74

On-Isle YTD = \$416.71



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	\$417.20	\$392.99	\$442.51	\$393.11	\$392.13	\$387.35	\$384.49	\$336.97	\$537.25	\$442.95	\$609.09
	Median	\$323	\$333	\$300	\$343	\$325	\$333	\$333	\$250	\$383	\$333	\$500
	Minimum	\$0	\$0	\$0	\$0	\$67	\$0	\$50	\$0	\$0	\$0	\$0
	Maximum	\$3,120	\$1,700	\$3,120	\$1,700	\$1,540	\$1,667	\$1,000	\$3,120	\$2,000	\$2,100	\$2,000

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$41.97	\$60.59	\$22.50	\$12.48	\$30.22	\$69.69	\$64.52
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$37.41	\$38.29	\$36.49	\$23.28	\$29.99	\$46.59	\$64.02
	Median	\$10	\$10	\$8	\$5	\$5	\$10	\$50
F&B RESTRNT	Mean	\$90.42	\$117.58	\$62.00	\$31.45	\$79.91	\$132.81	\$142.12
	Median	\$8	\$50	\$0	\$0	\$2	\$60	\$90
OPT TOUR	Mean	\$67.63	\$79.27	\$55.46	\$36.46	\$61.15	\$79.38	\$121.76
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$178.64	\$175.66	\$181.75	\$106.66	\$160.88	\$240.30	\$234.00
	Median	\$22	\$15	\$33	\$0	\$0	\$65	\$100
GIFT- OTHER	Mean	\$111.34	\$114.10	\$108.45	\$75.38	\$90.25	\$126.29	\$190.69
	Median	\$50	\$50	\$50	\$20	\$30	\$100	\$100
TRANS	Mean	\$18.99	\$23.15	\$14.63	\$13.14	\$10.82	\$29.42	\$23.21
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$201.65	\$229.50	\$172.52	\$122.78	\$196.89	\$284.04	\$184.60
	Median	\$0	\$8	\$0	\$0	\$50	\$0	\$0
TOTAL	Mean	\$748.05	\$838.15	\$653.80	\$421.61	\$660.12	\$1,008.52	\$1,024.93
	Median	\$500	\$675	\$395	\$300	\$500	\$800	\$1,000

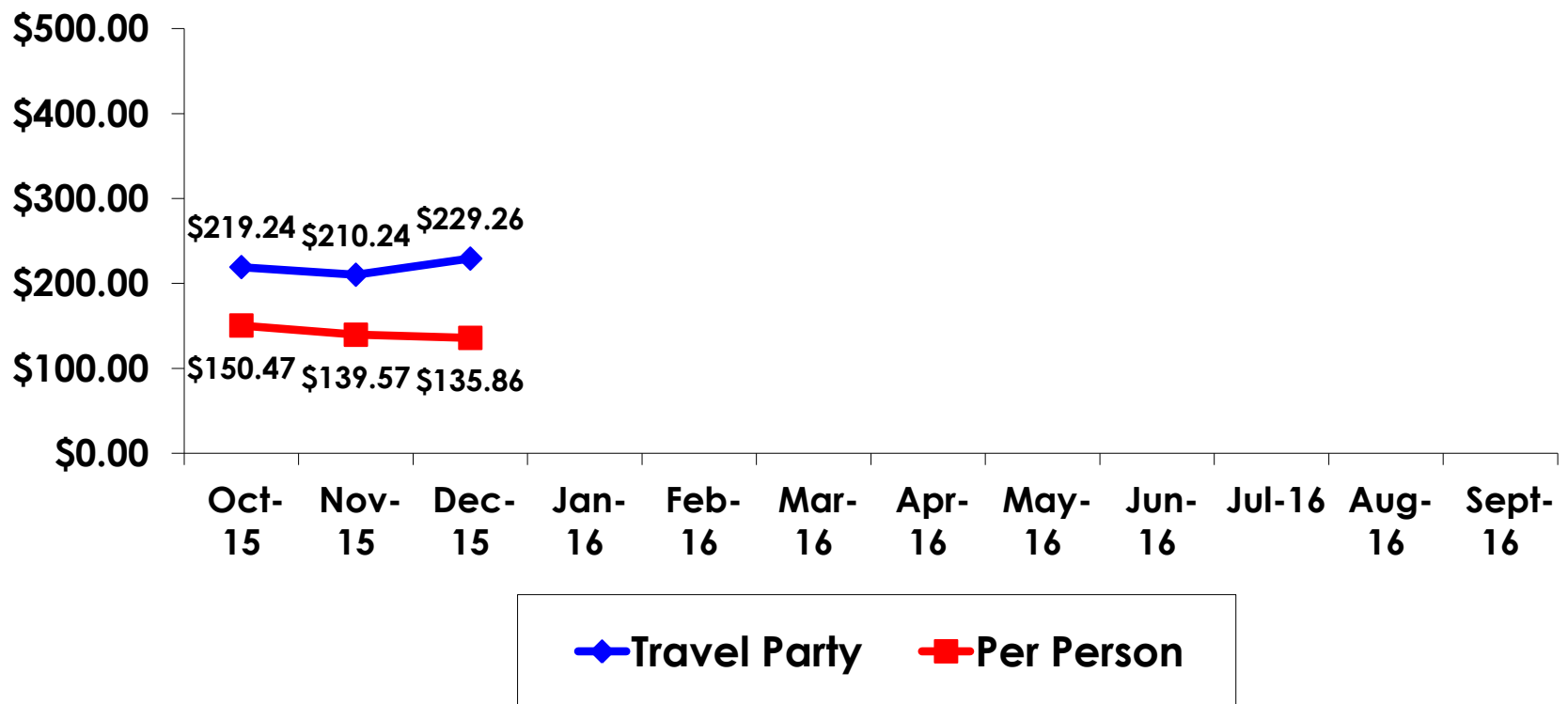
On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$41.97	\$37.31	\$46.90
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$37.41	\$34.78	\$40.27
	Median	\$10	\$10	\$10
F&B RESTRNT	Mean	\$90.42	\$63.33	\$115.34
	Median	\$8	\$0	\$50
OPT TOUR	Mean	\$67.63	\$66.96	\$68.70
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$178.64	\$119.63	\$238.99
	Median	\$22	\$0	\$50
GIFT- OTHER	Mean	\$111.34	\$100.93	\$122.44
	Median	\$50	\$50	\$60
TRANS	Mean	\$18.99	\$16.46	\$21.64
	Median	\$0	\$0	\$0
OTHER	Mean	\$201.65	\$157.61	\$247.08
	Median	\$0	\$8	\$0
TOTAL	Mean	\$748.05	\$597.01	\$901.35
	Median	\$500	\$400	\$700

ON-ISLE EXPENDITURES – Per Day

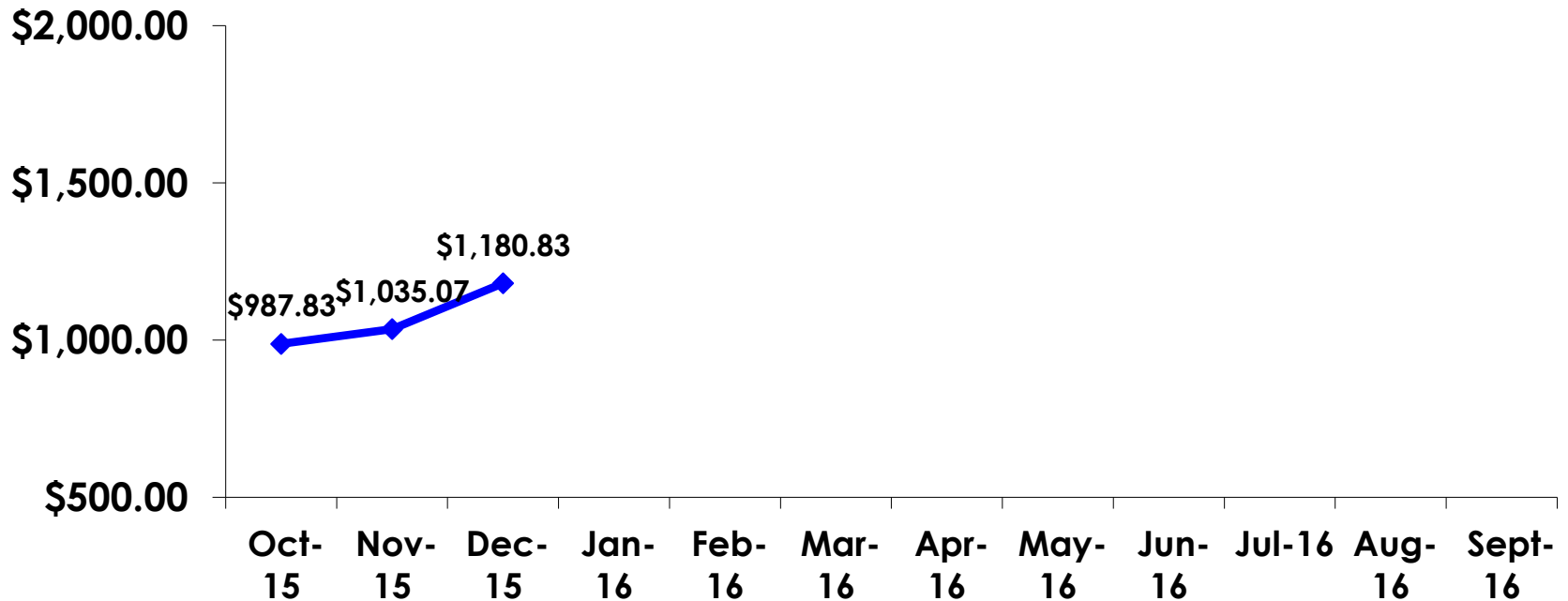
Travel Party YTD = \$219.65 Per Person YTD = \$141.92



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,180.83 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,158 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



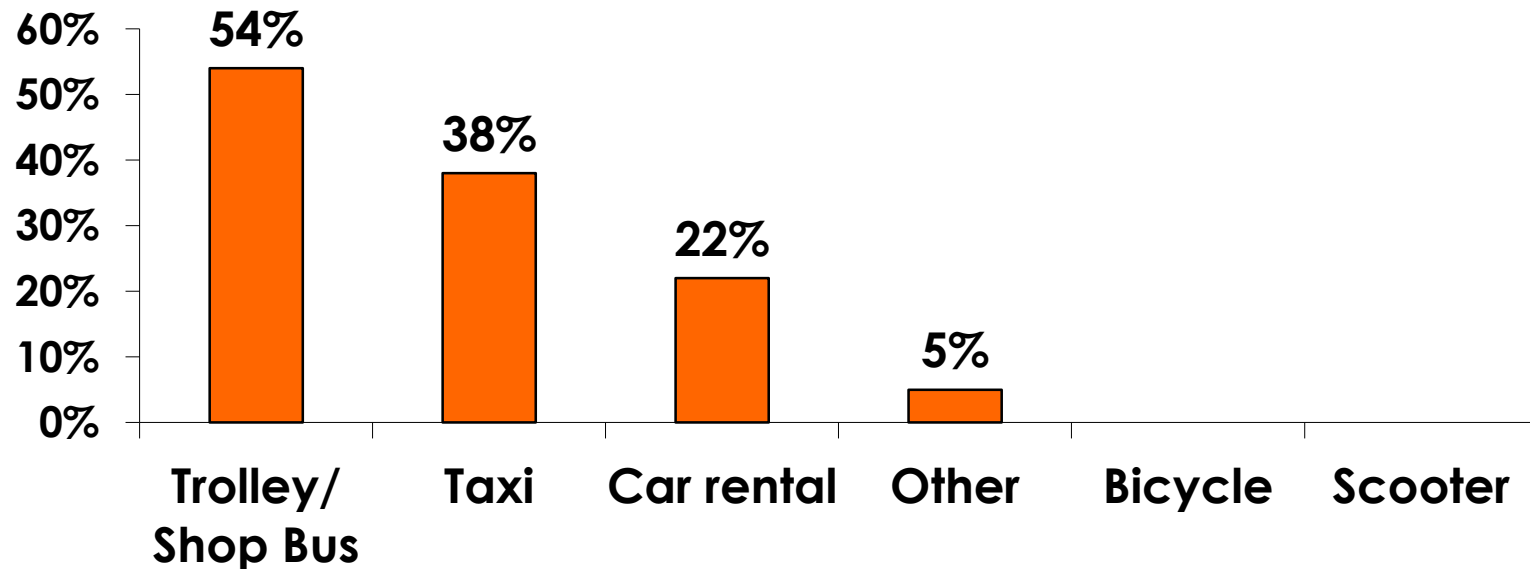
YTD=\$1,068.45

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$41.97
Food & beverage in fast food restaurant/convenience store	\$37.41
Food & beverage at restaurants or drinking establishments outside a hotel	\$90.42
Optional tours and activities	\$67.63
Gifts/ souvenirs for yourself/companions	\$178.64
Gifts/ souvenirs for friends/family at home	\$111.34
Local transportation	\$18.99
Other expenses not covered	\$201.65
Average Total	\$748.05

Local Transportation

n=82



Mean=\$18.99 per travel party

Guam Airport Expenditures

- \$28.12 = Mean
- \$10 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$400 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

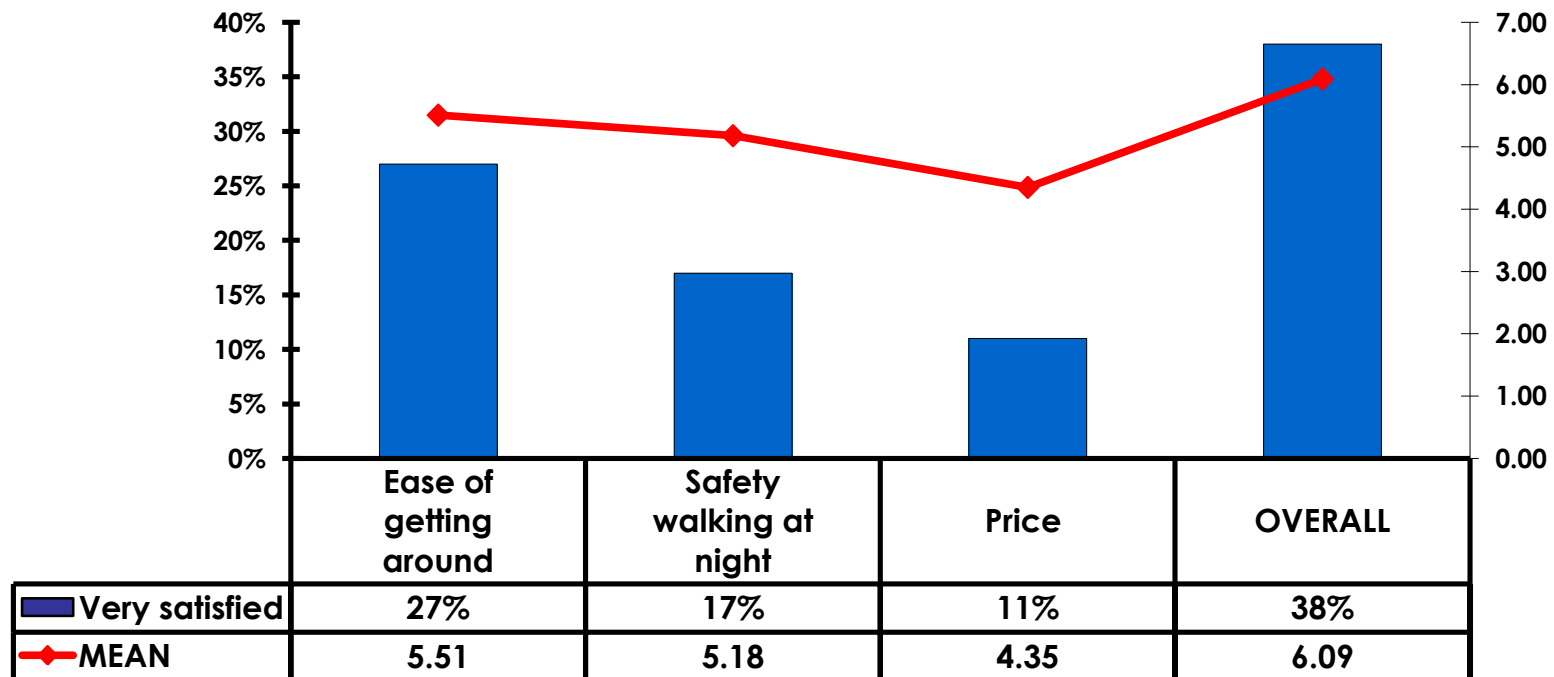
	MEAN \$
Food & Beverages	\$10.07
Gifts/Souvenirs Self	\$6.67
Gifts/Souvenirs Others	\$10.84
Total	\$28.12

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

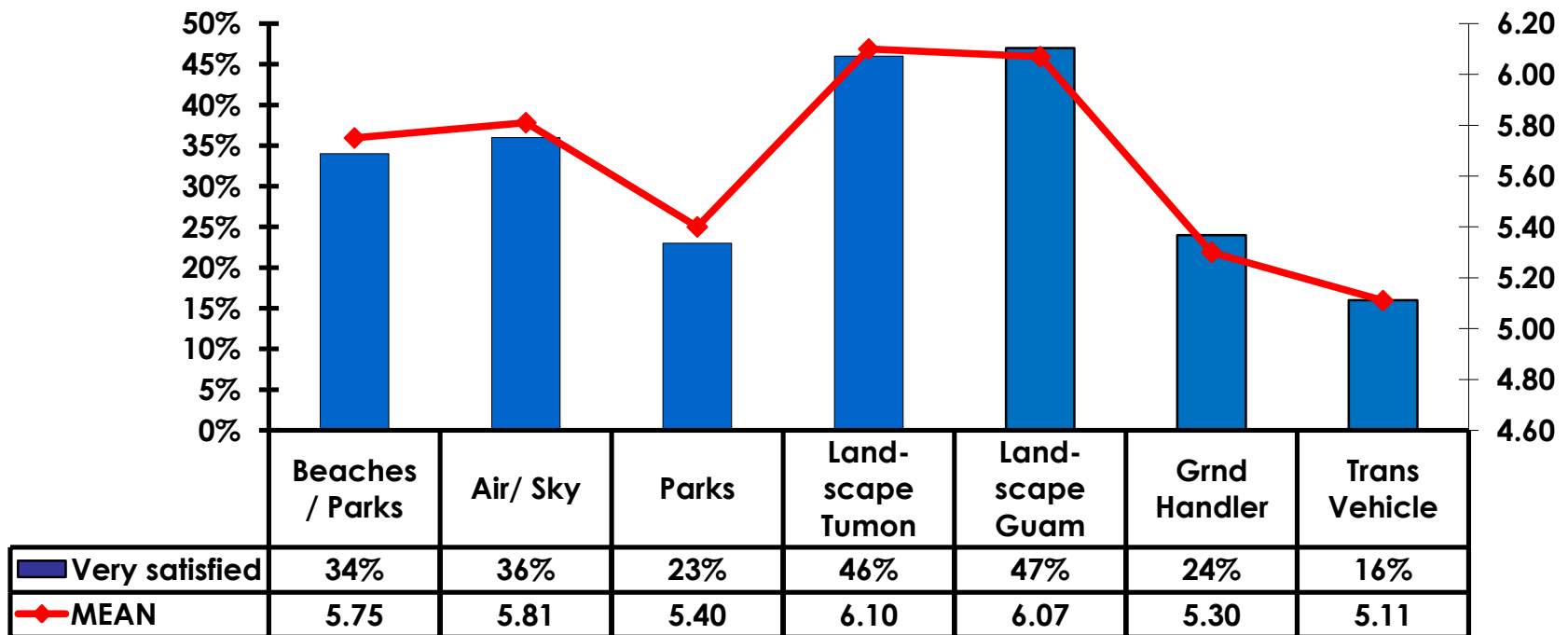
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

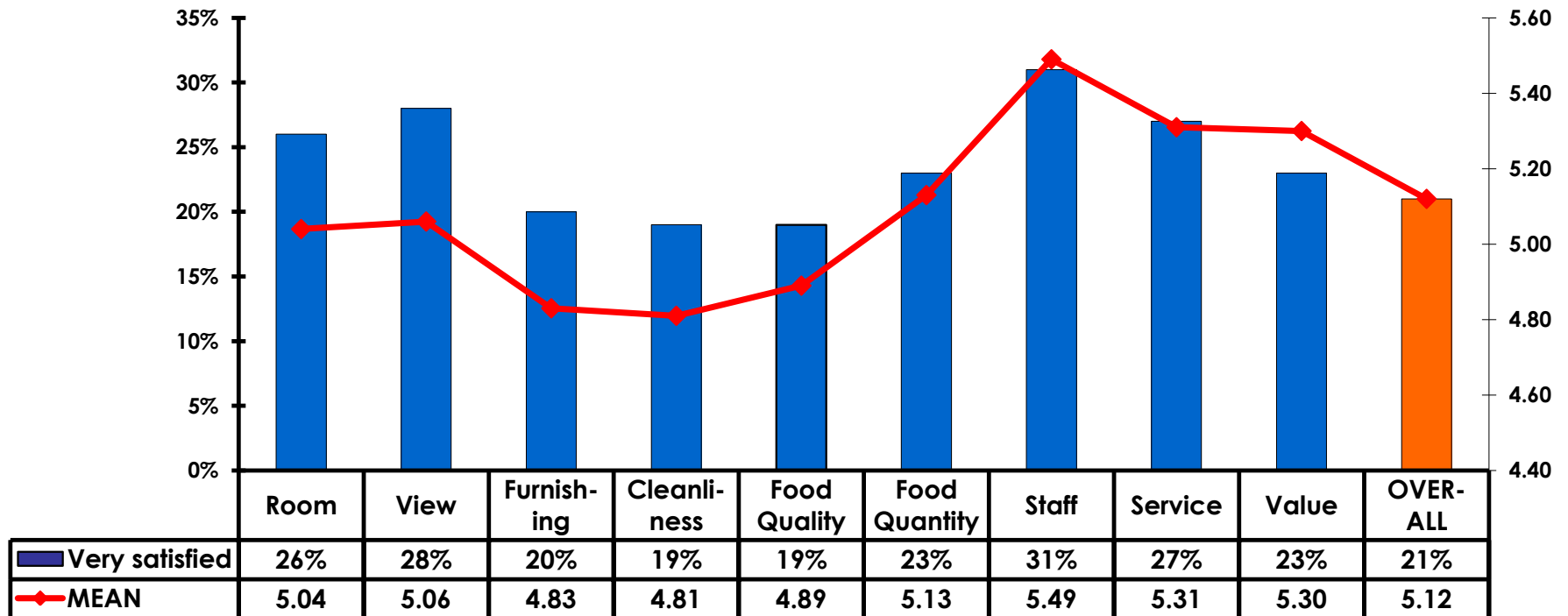
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

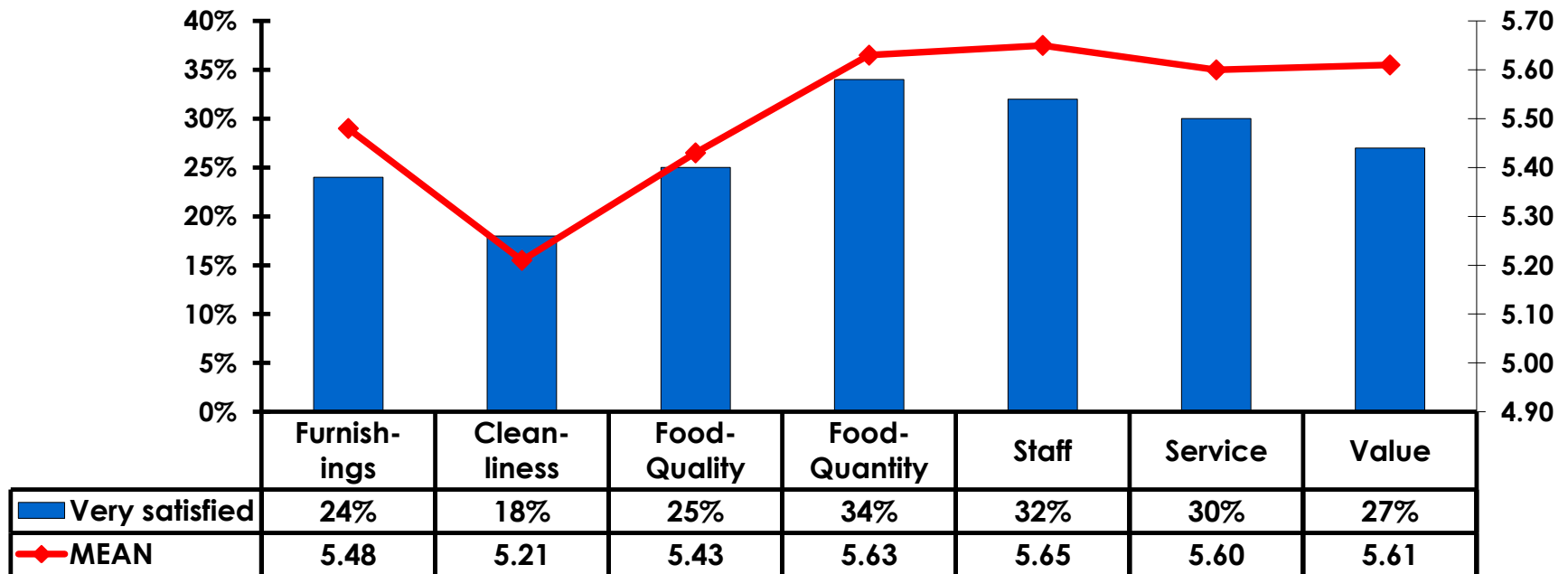
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

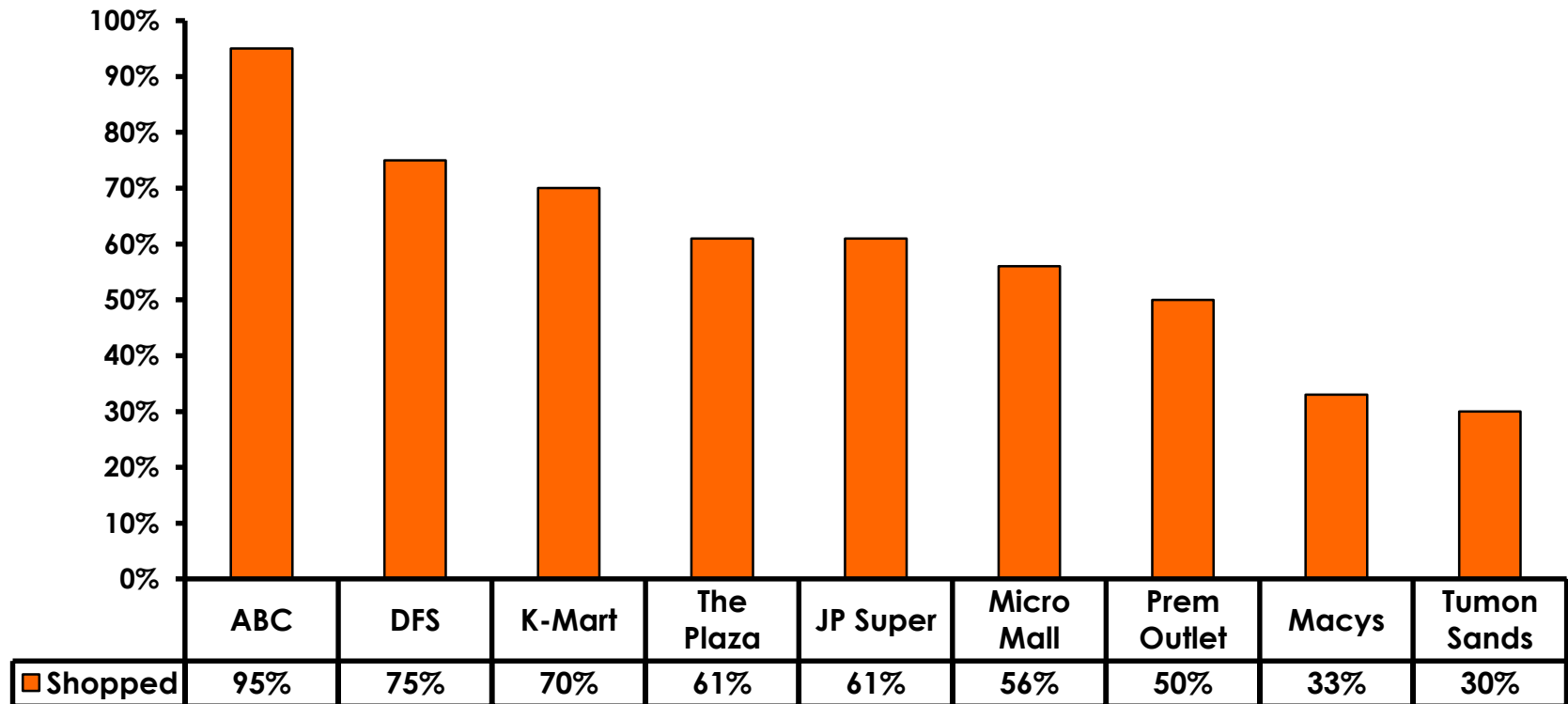
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



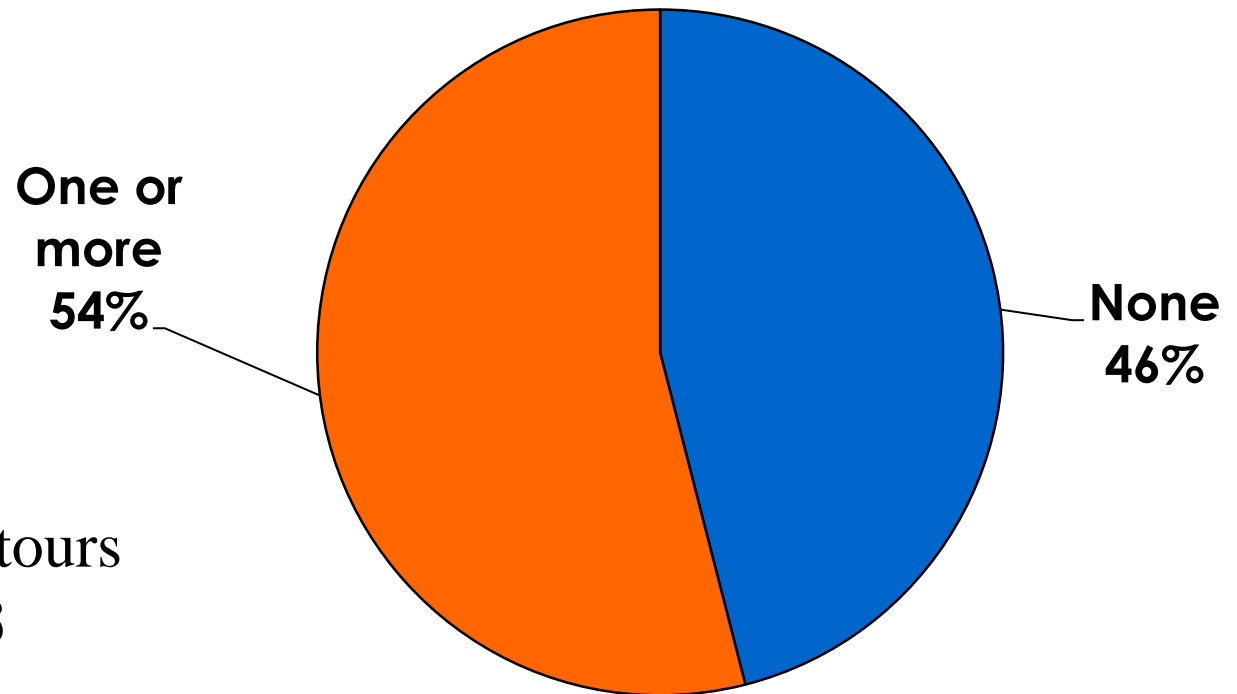
Satisfaction with Shopping

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 = 50%
Score of 4 to 5 = 43%	Score of 4 to 5 = 46%
Score 1 to 3 = 3%	Score 1 to 3 = 5%
MEAN = 5.52	MEAN = 5.43

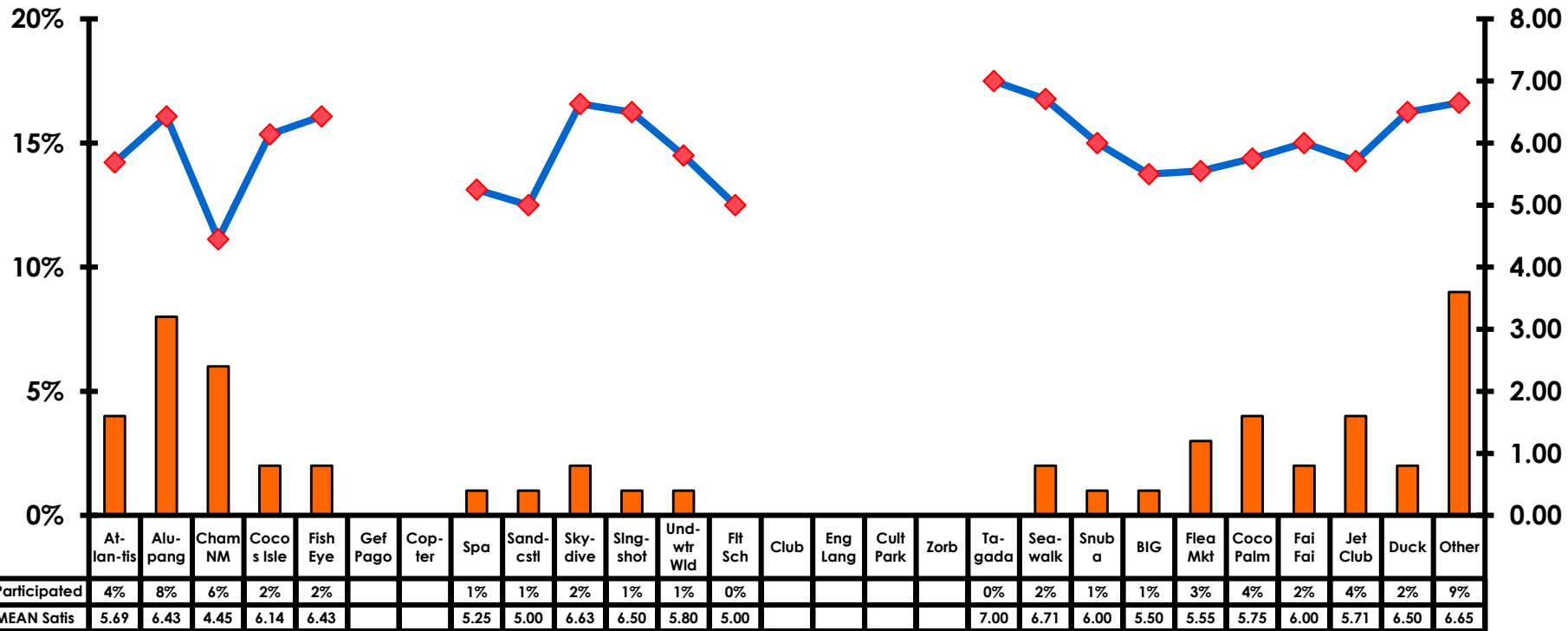
Optional Tour Participation



- Average number of tours participated in is .93

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 = 54%	Score of 6 to 7 = 53%
Score of 4 to 5 = 44%	Score of 4 to 5 = 47%
Score 1 to 3 = 2%	Score 1 to 3 = 1%
MEAN = 5.46	MEAN = 5.44

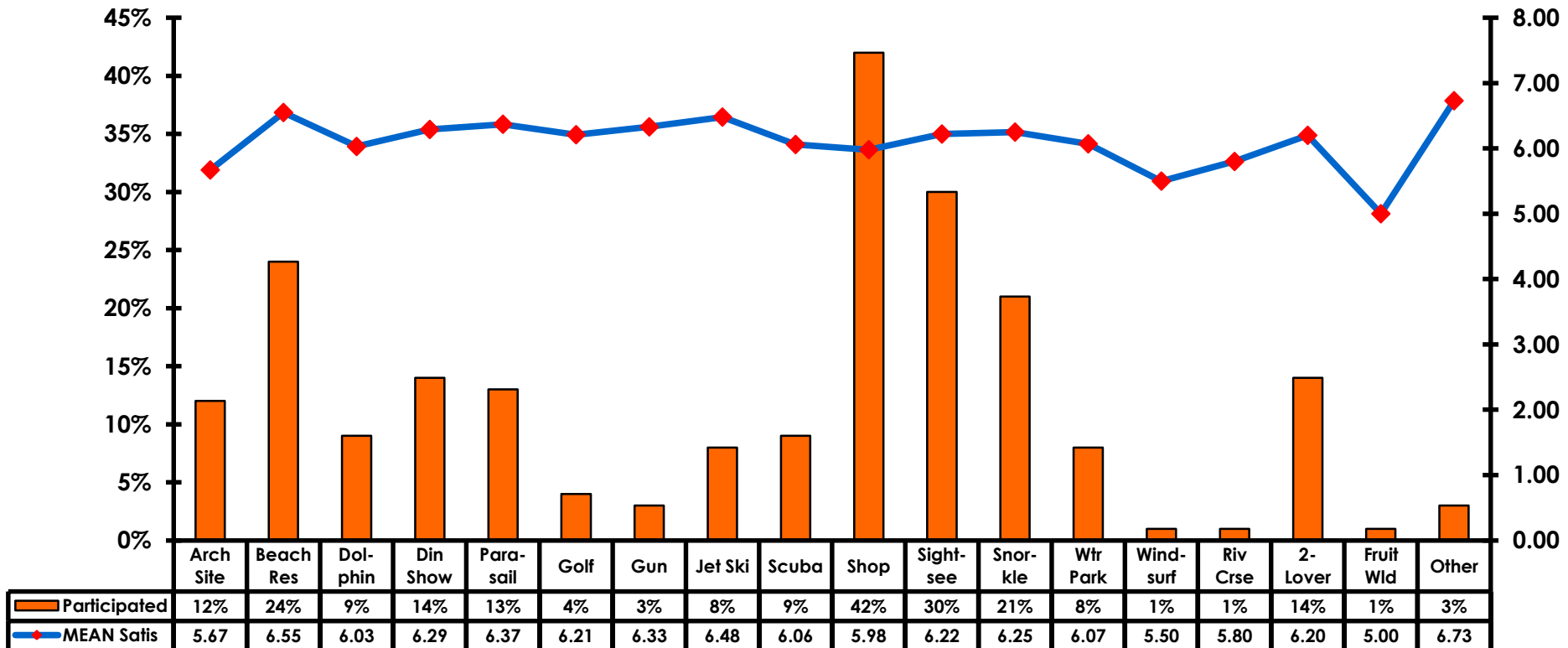
Night Tours Satisfaction

7pt Rating Scale

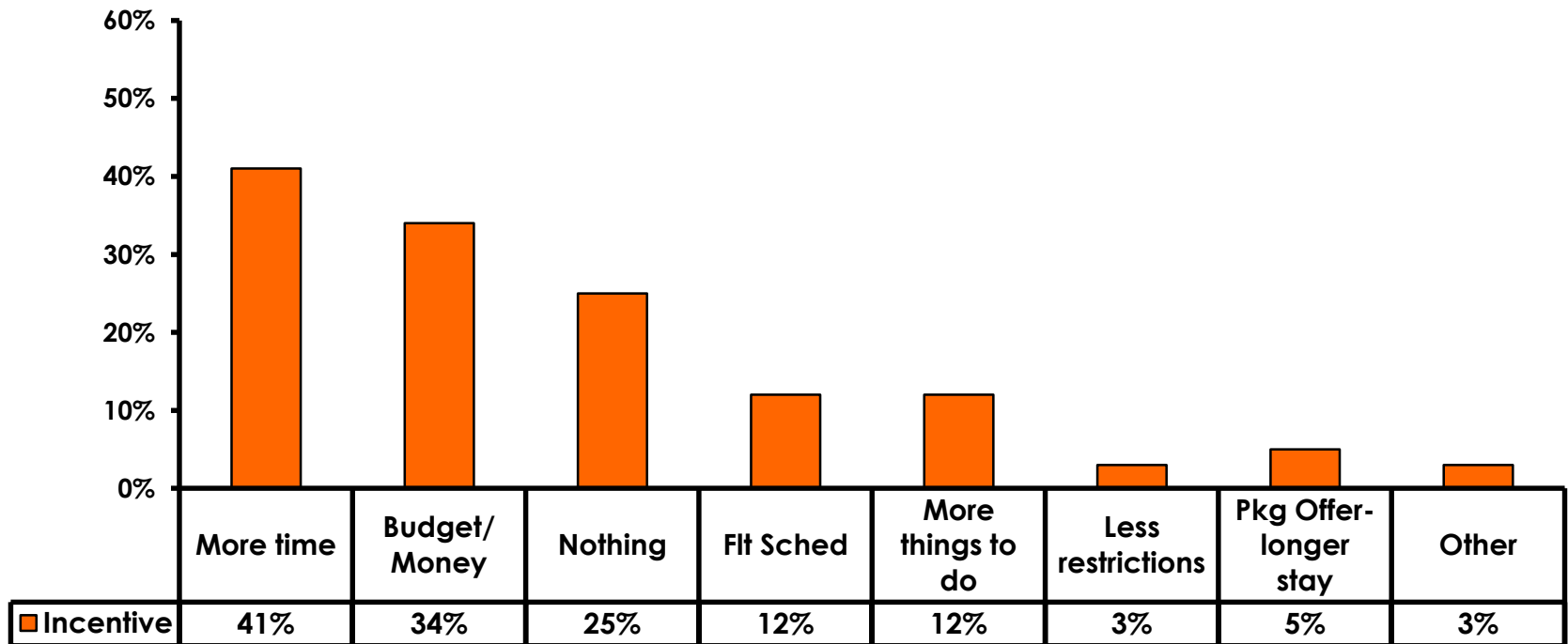
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 33%	Score of 6 to 7 = 30%
Score of 4 to 5 = 64%	Score of 4 to 5 = 65%
Score 1 to 3 = 3%	Score 1 to 3 = 5%
MEAN = 4.83	MEAN = 4.77

Satisfaction with Other Activities



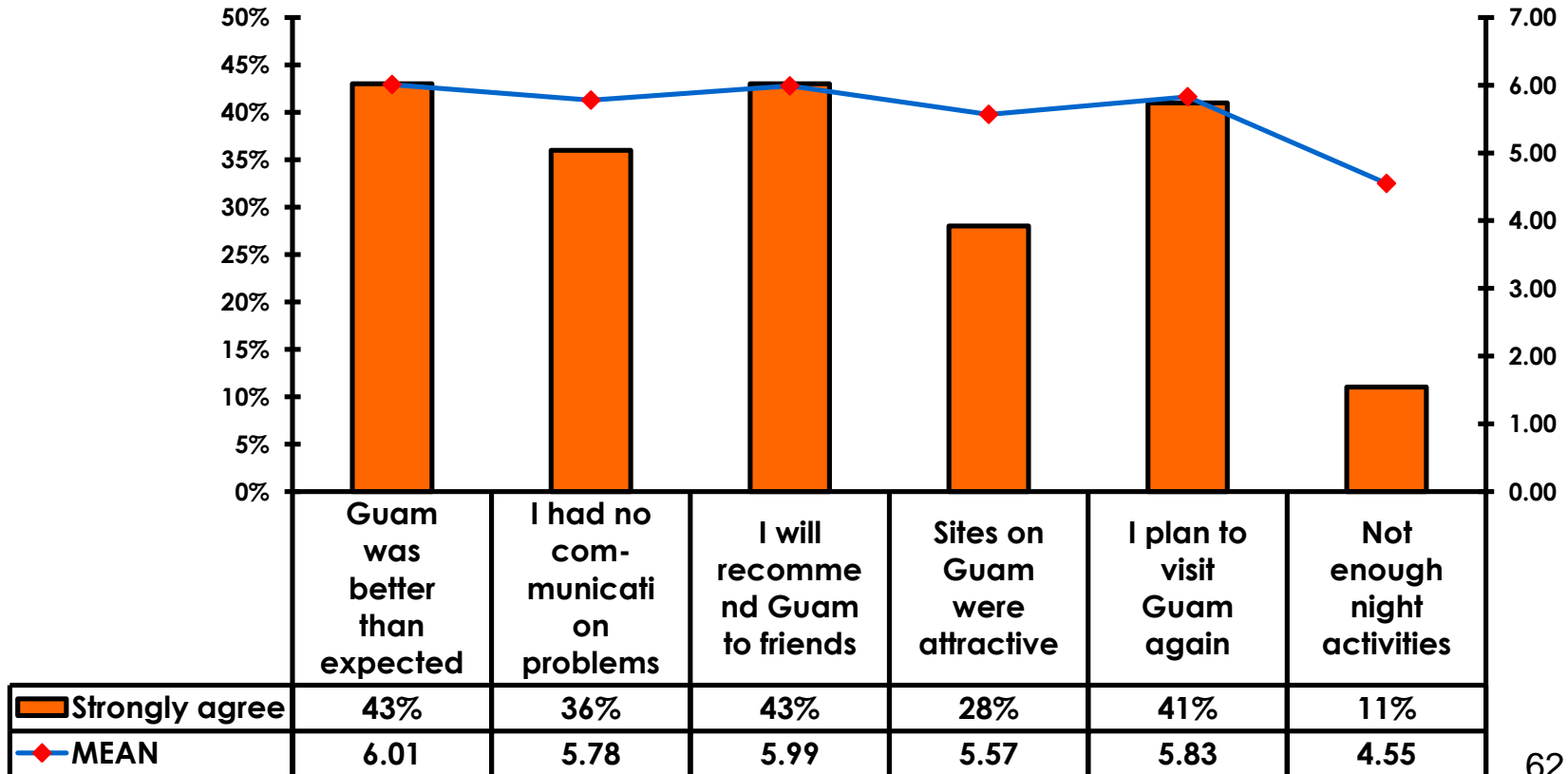
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

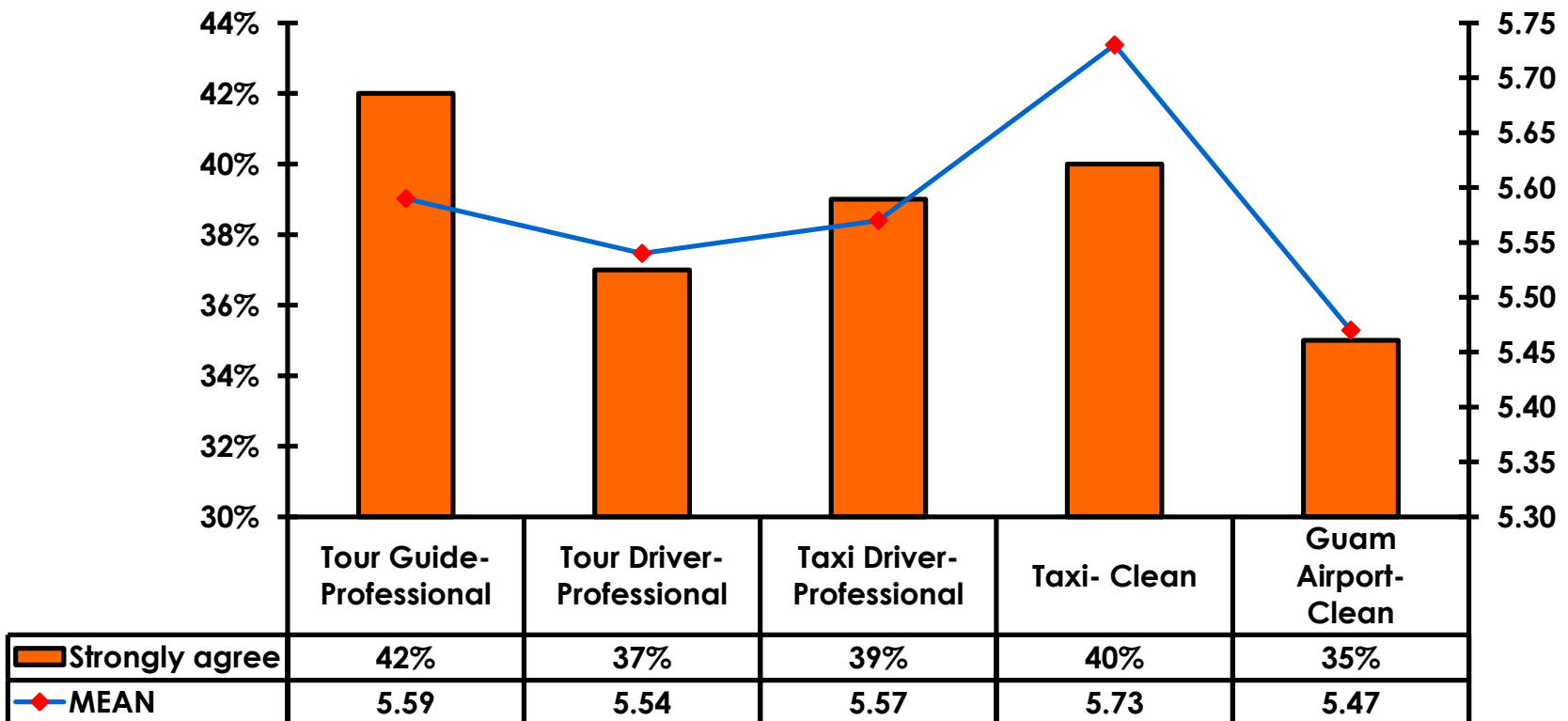
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

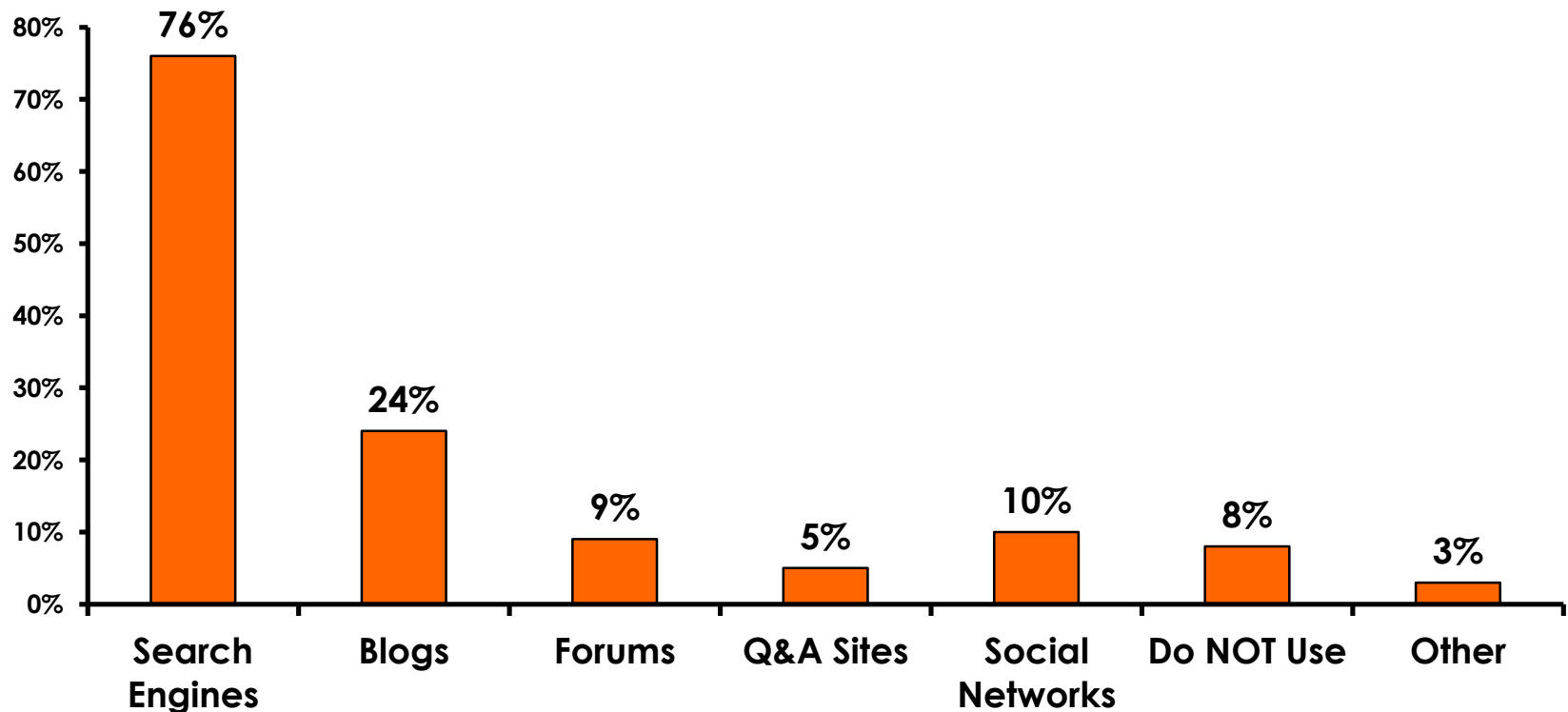
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



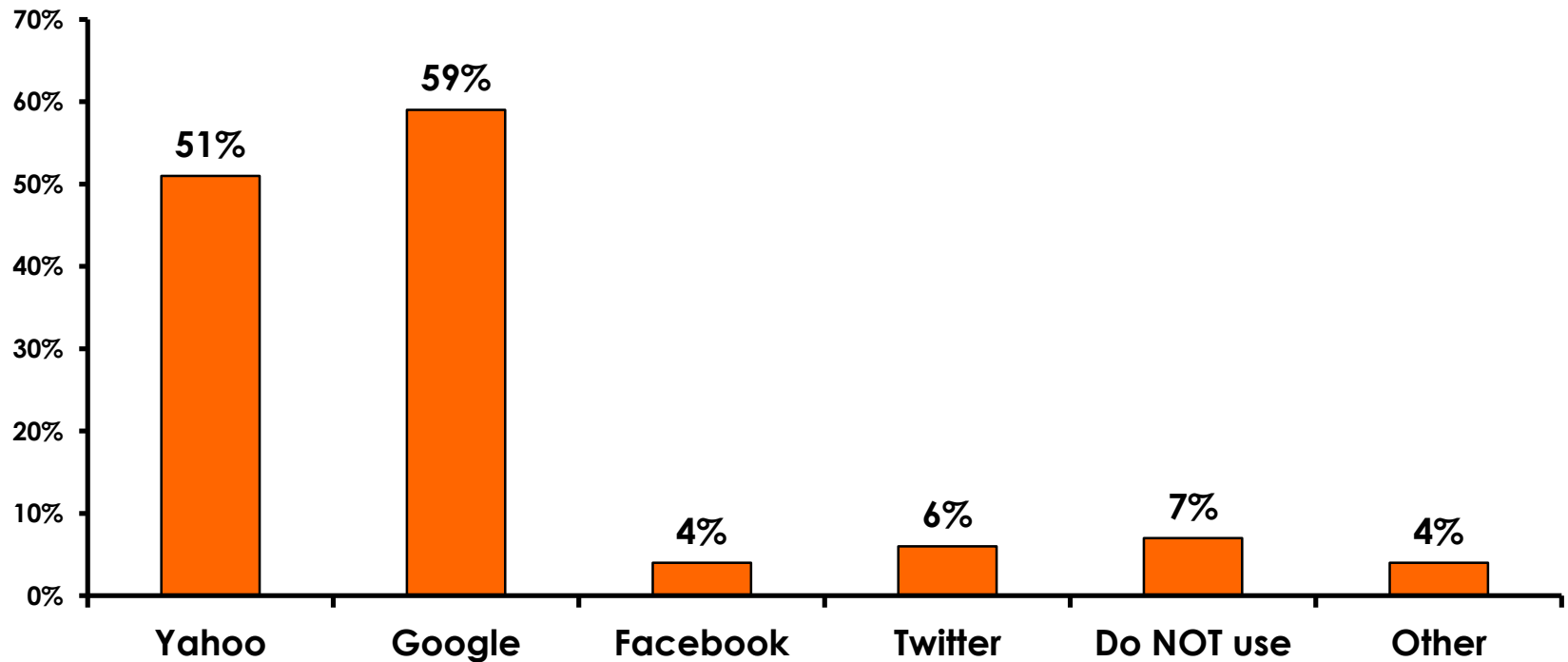
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

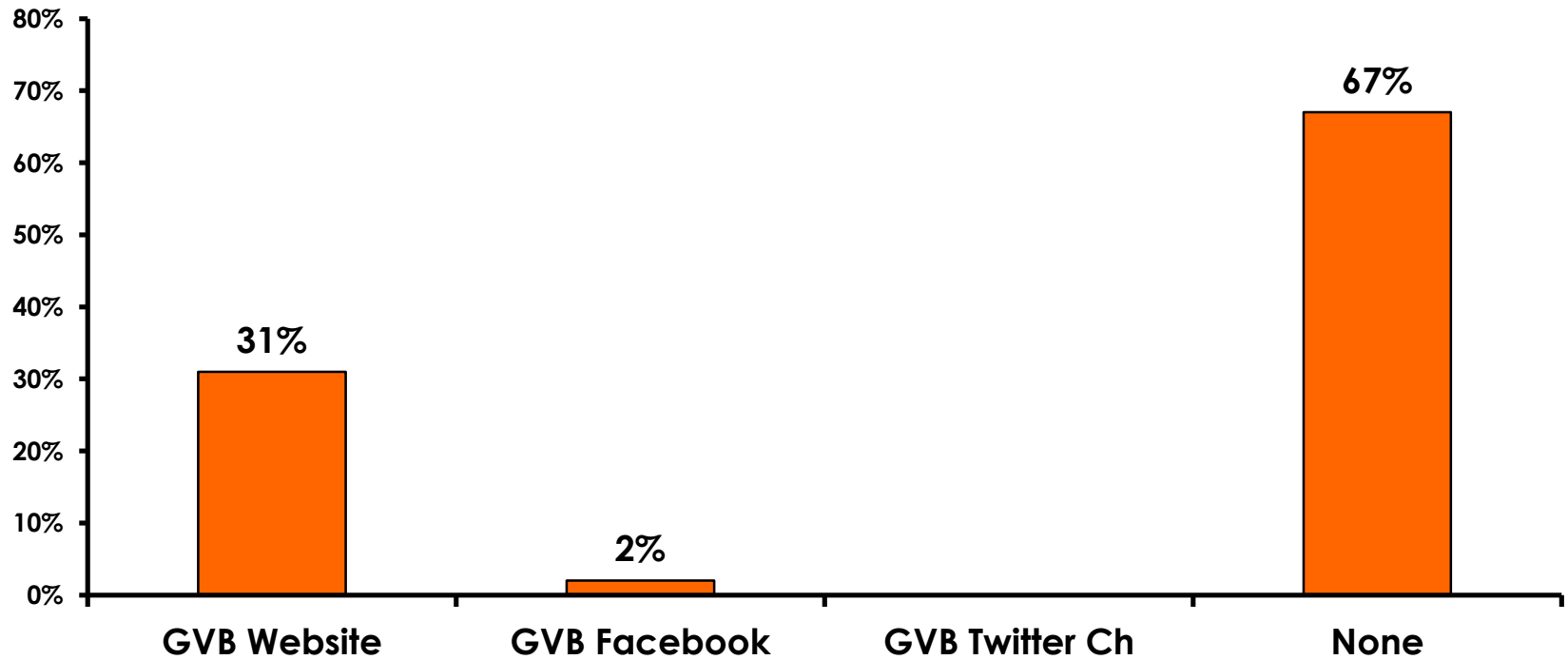


Internet- Things To Do

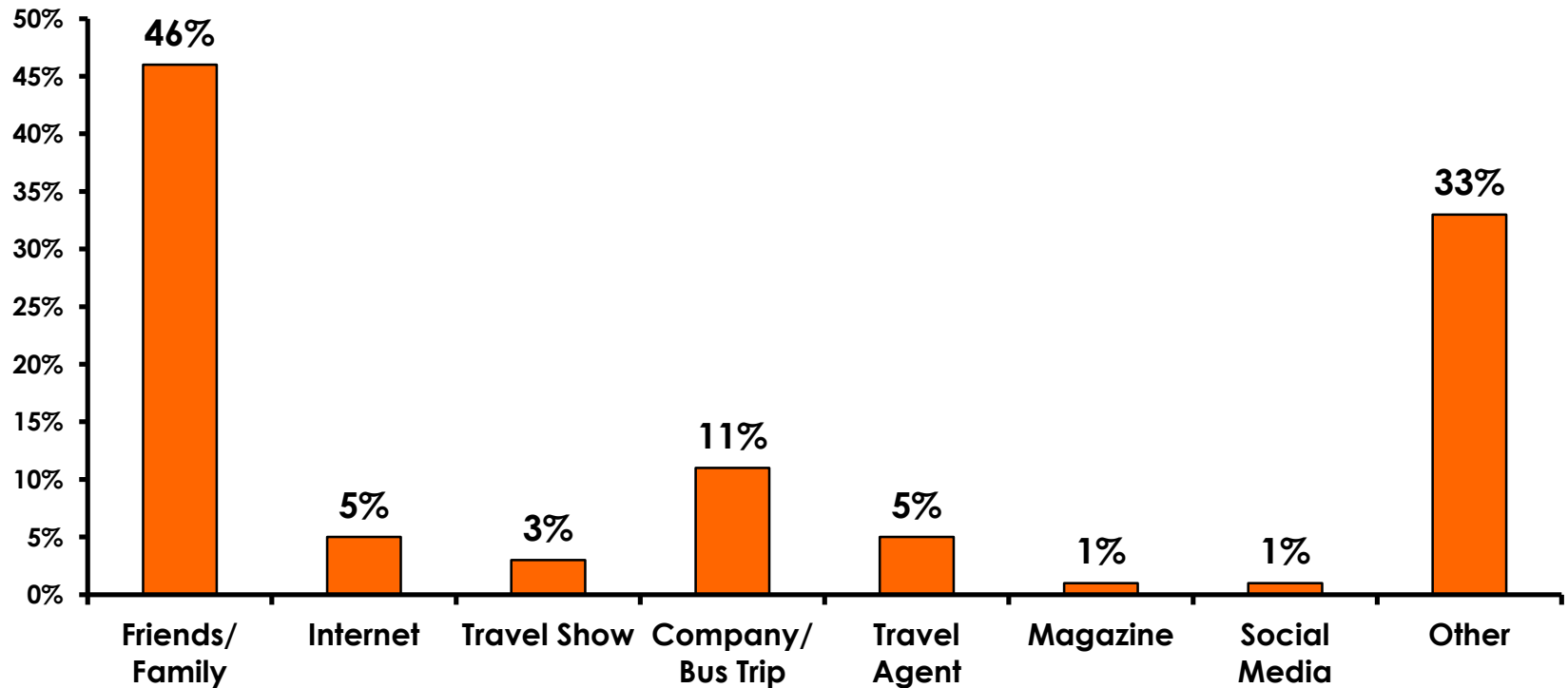
Sources of Info



Internet- GVB Sources

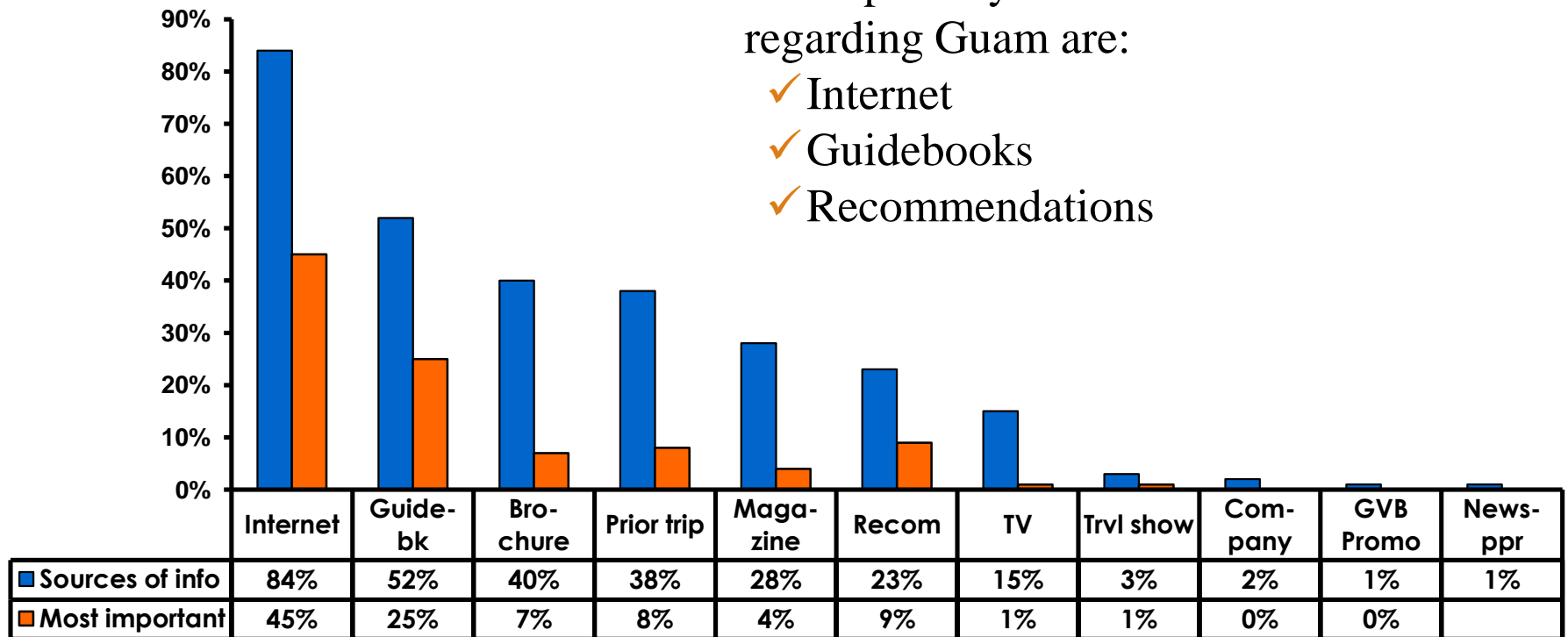


Travel Motivation- Info Sources



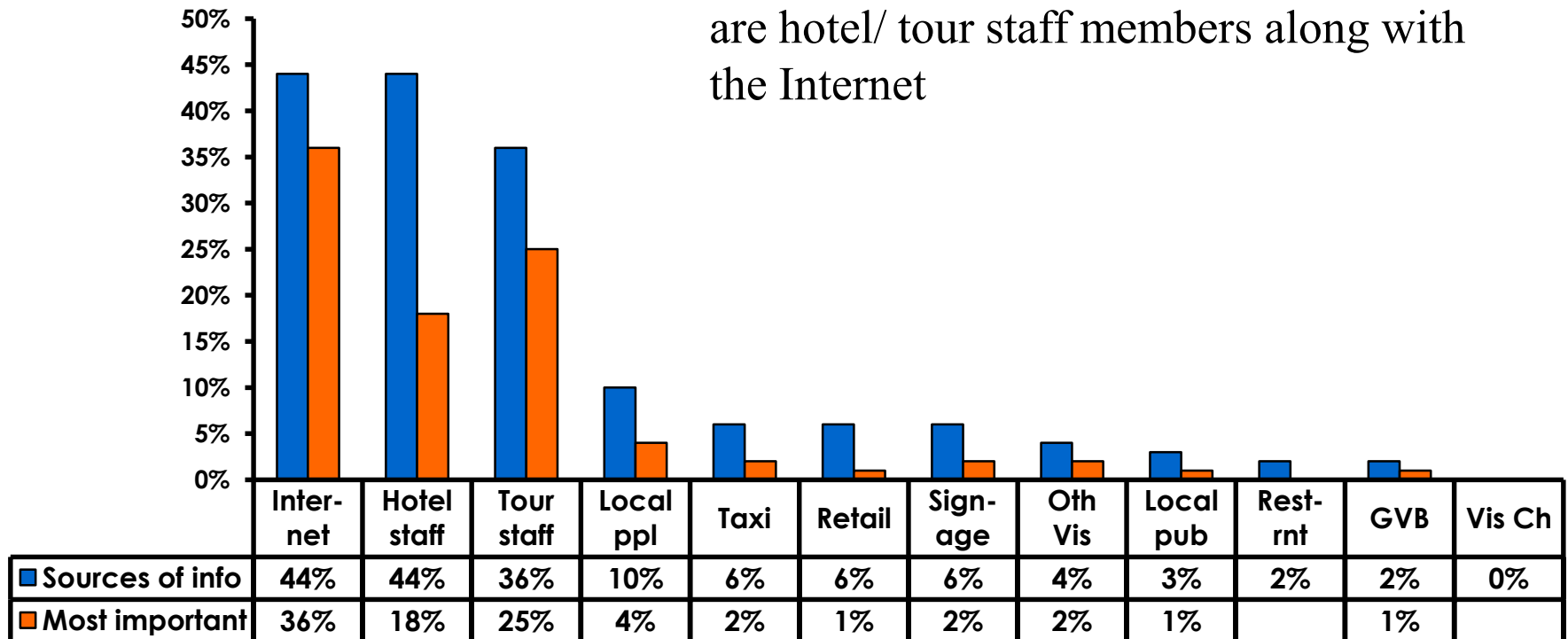
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

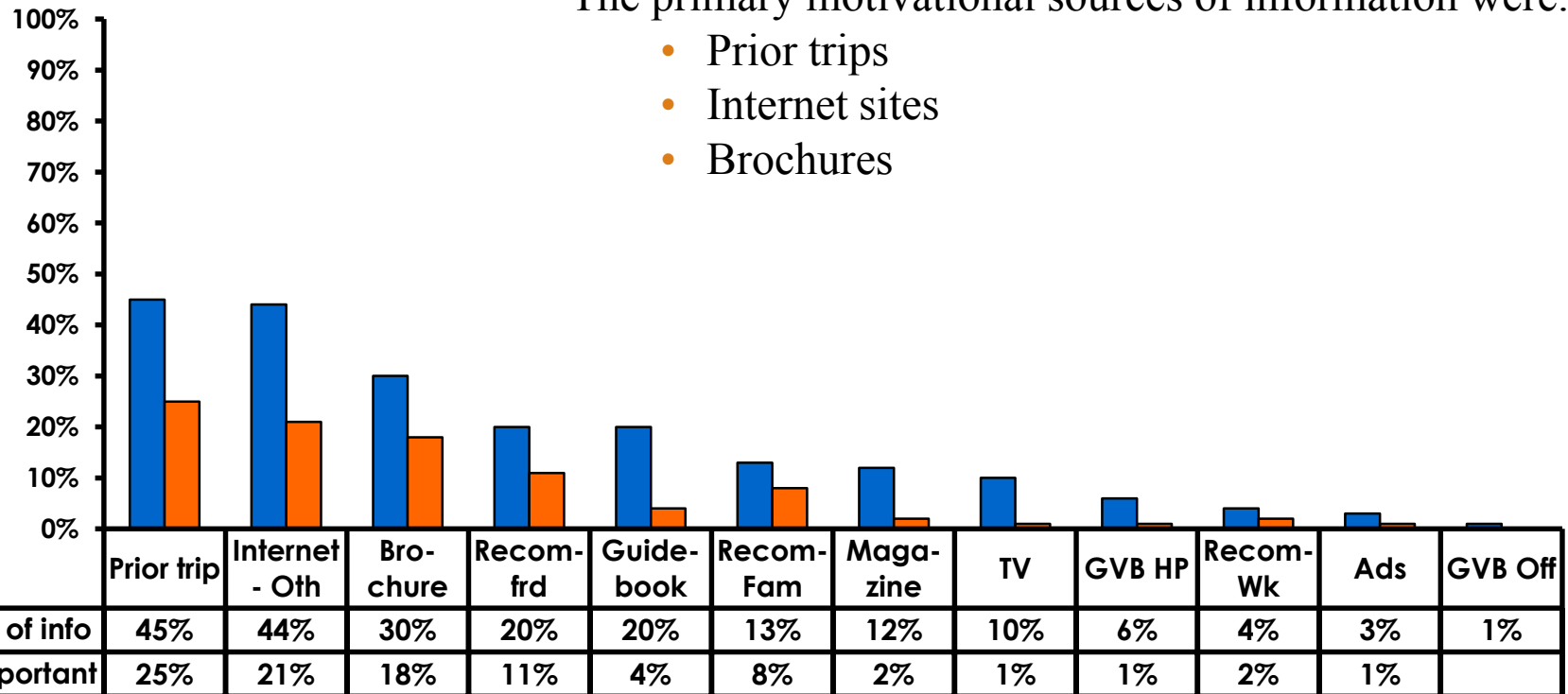
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

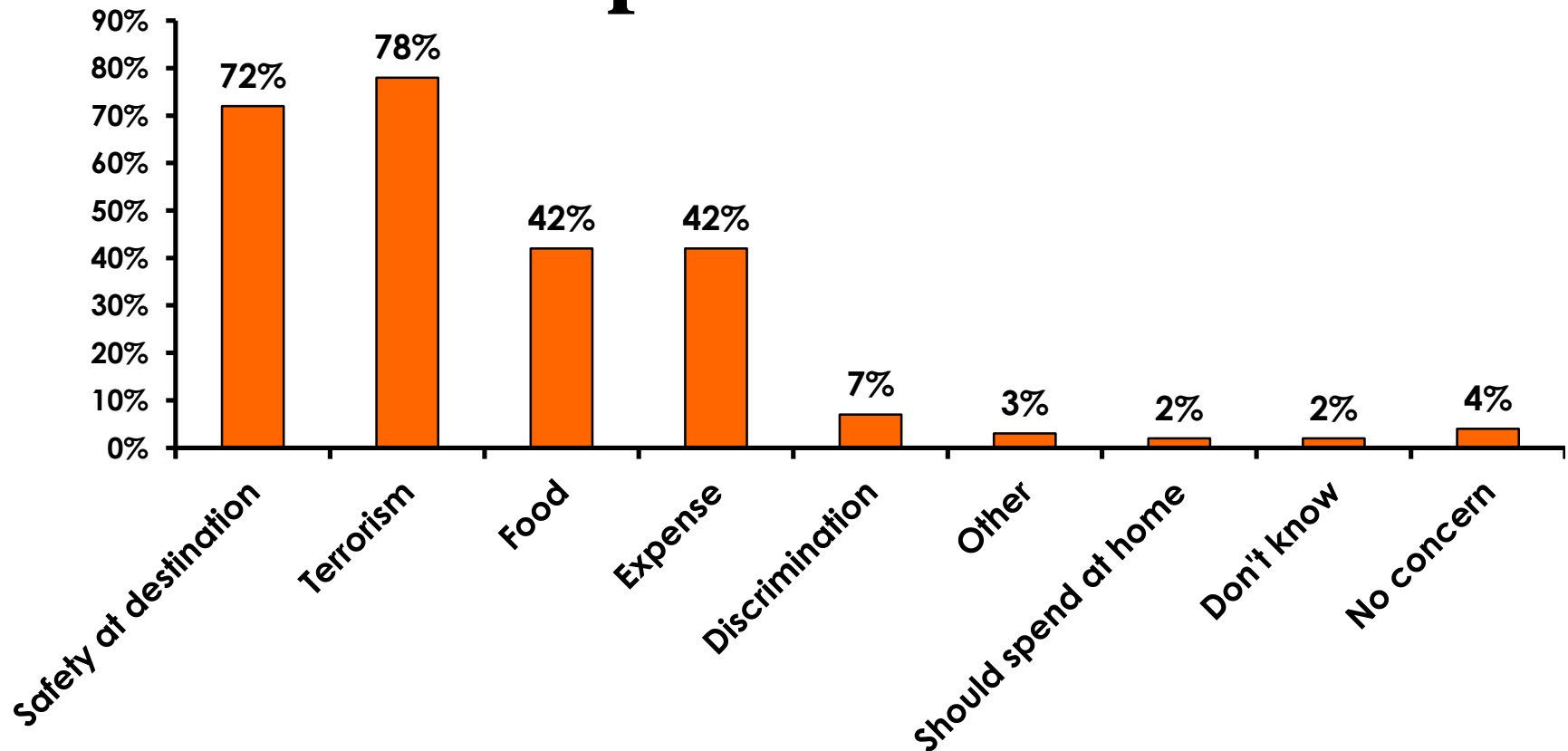
The primary motivational sources of information were.

- Prior trips
- Internet sites
- Brochures



SECTION 6 **OTHER ISSUES**

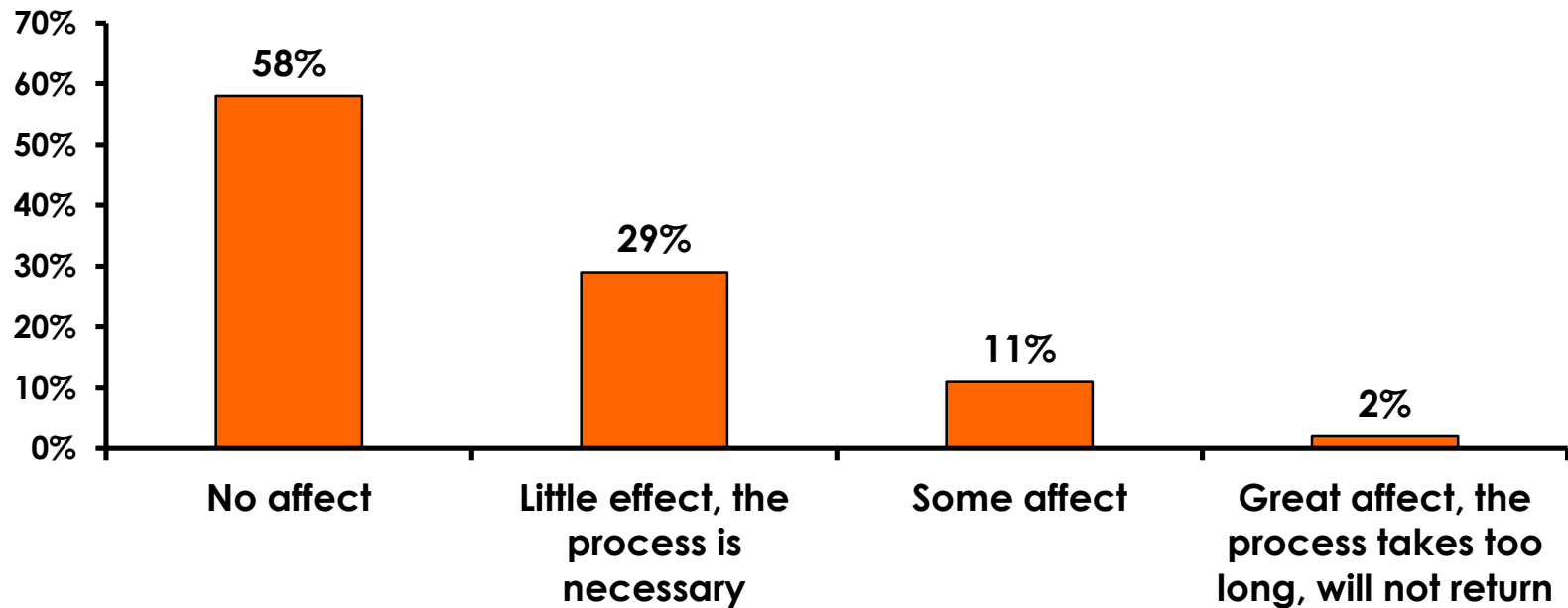
Concerns about travel outside of Japan - Overall



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	78%	68%	84%	80%	80%	36%	72%	70%	77%	82%	87%	78%	100%	
	Safety	72%	69%	67%	72%	90%	64%	76%	73%	72%	74%	74%	72%	56%	
	Expense	42%	42%	53%	36%	41%	64%	44%	36%	49%	56%	50%	31%	33%	
	Food	42%	38%	41%	42%	54%	45%	44%	41%	35%	49%	52%	44%	11%	
	Discrimination against Japanese	7%	9%	6%	4%	10%		16%	2%	7%	12%		9%	11%	
	No concerns	4%	5%	2%	4%	5%	9%	4%	5%	7%	1%	2%	8%		
	Other	3%	4%	4%	1%			4%	7%		6%	2%			
	Don't know	2%	5%		1%		9%		2%						
	Should spend at home	2%	3%	2%		2%	9%	4%	2%		1%	2%	2%		
	Total	Count	353	100	90	118	41	11	25	44	43	68	54	64	9

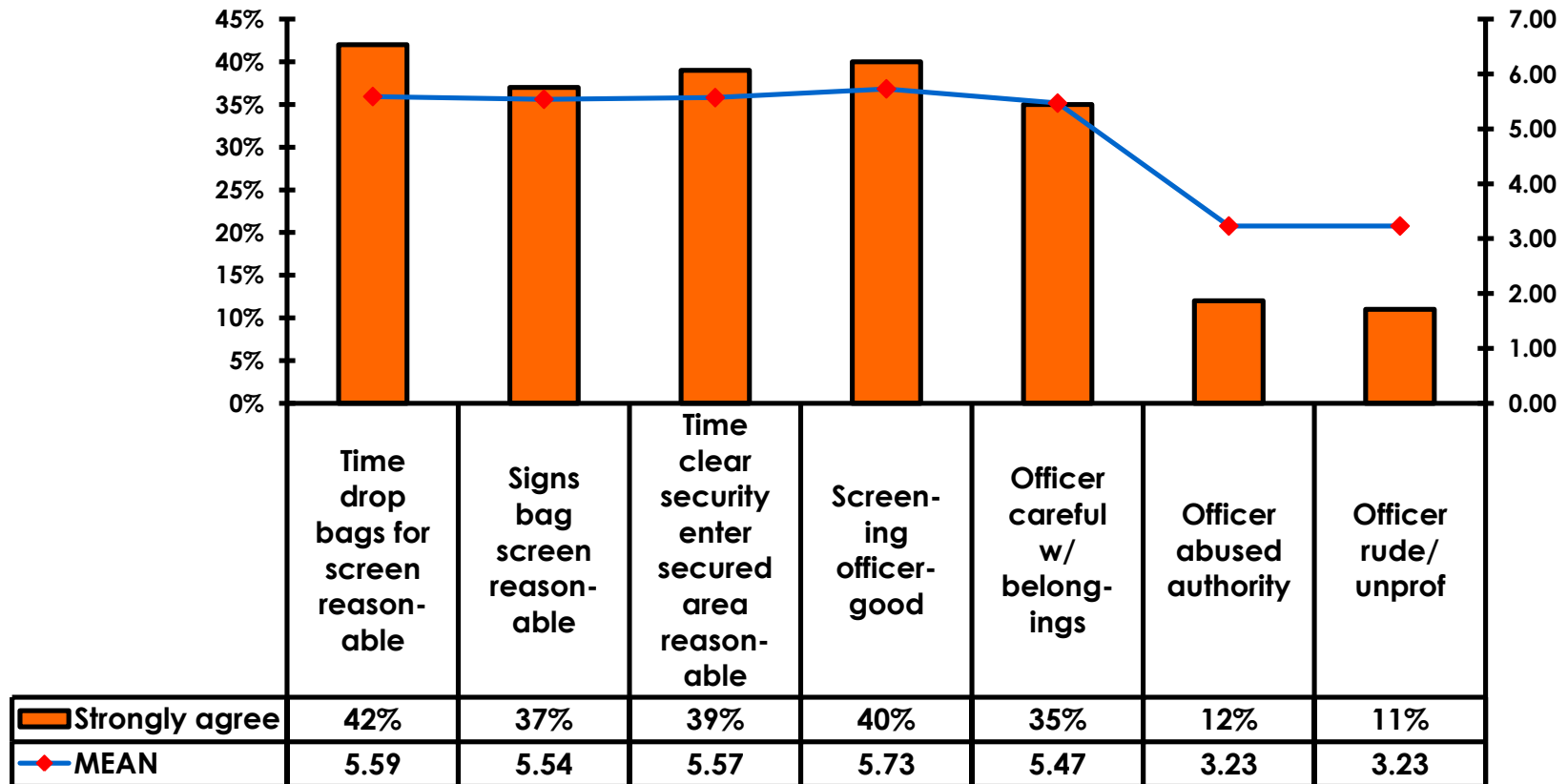
Security Screening/ Immigration Process at Guam International Airport



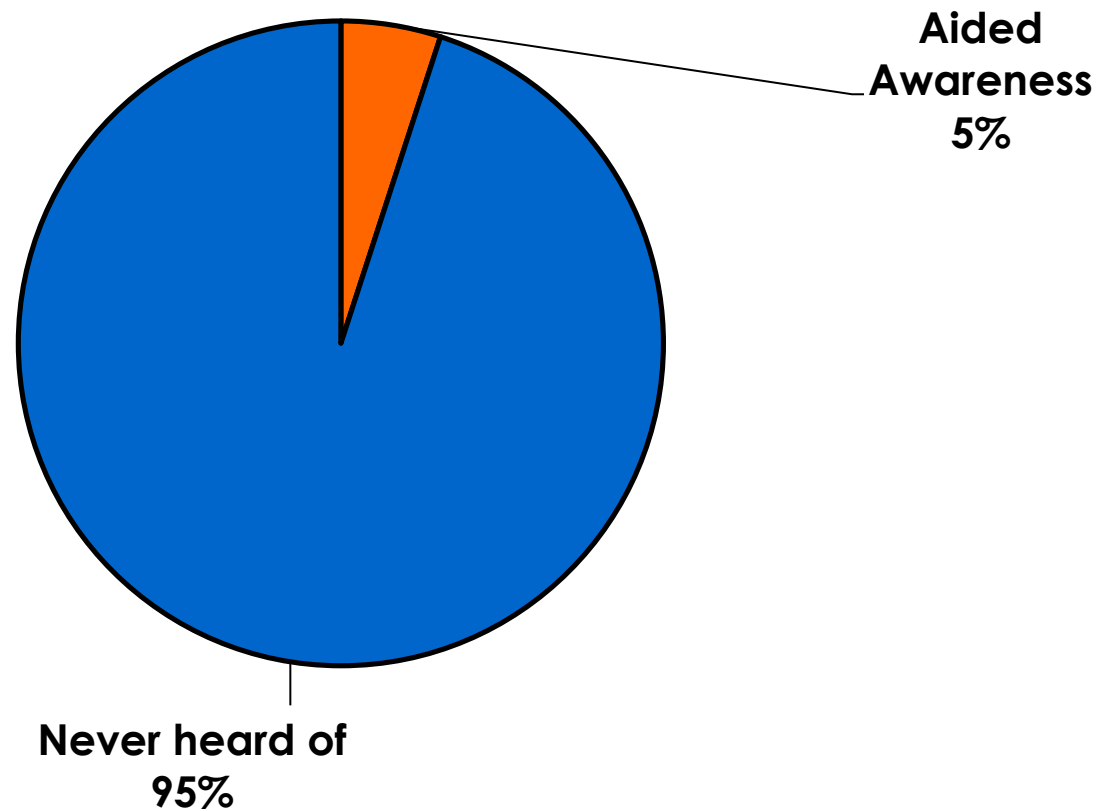
Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



Shop Guam Festival



Shop Guam Festival - Impact

n=17

