



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2016

FEBRUARY 2016



Prepared by: QMark Research

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Background & Methodology

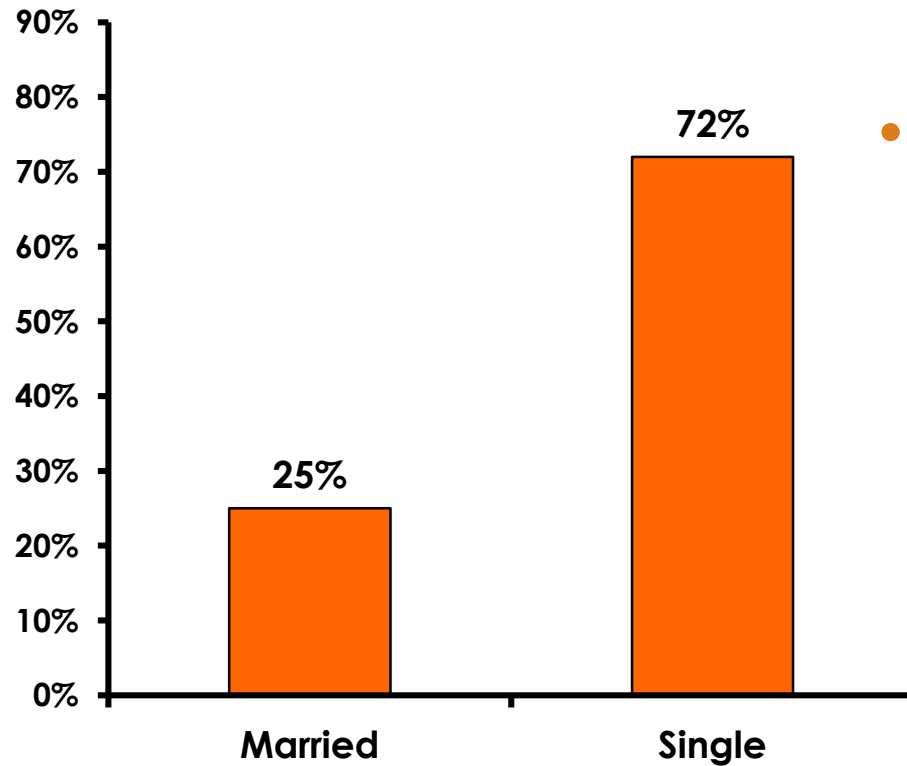
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **354** departing 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 **354** 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.

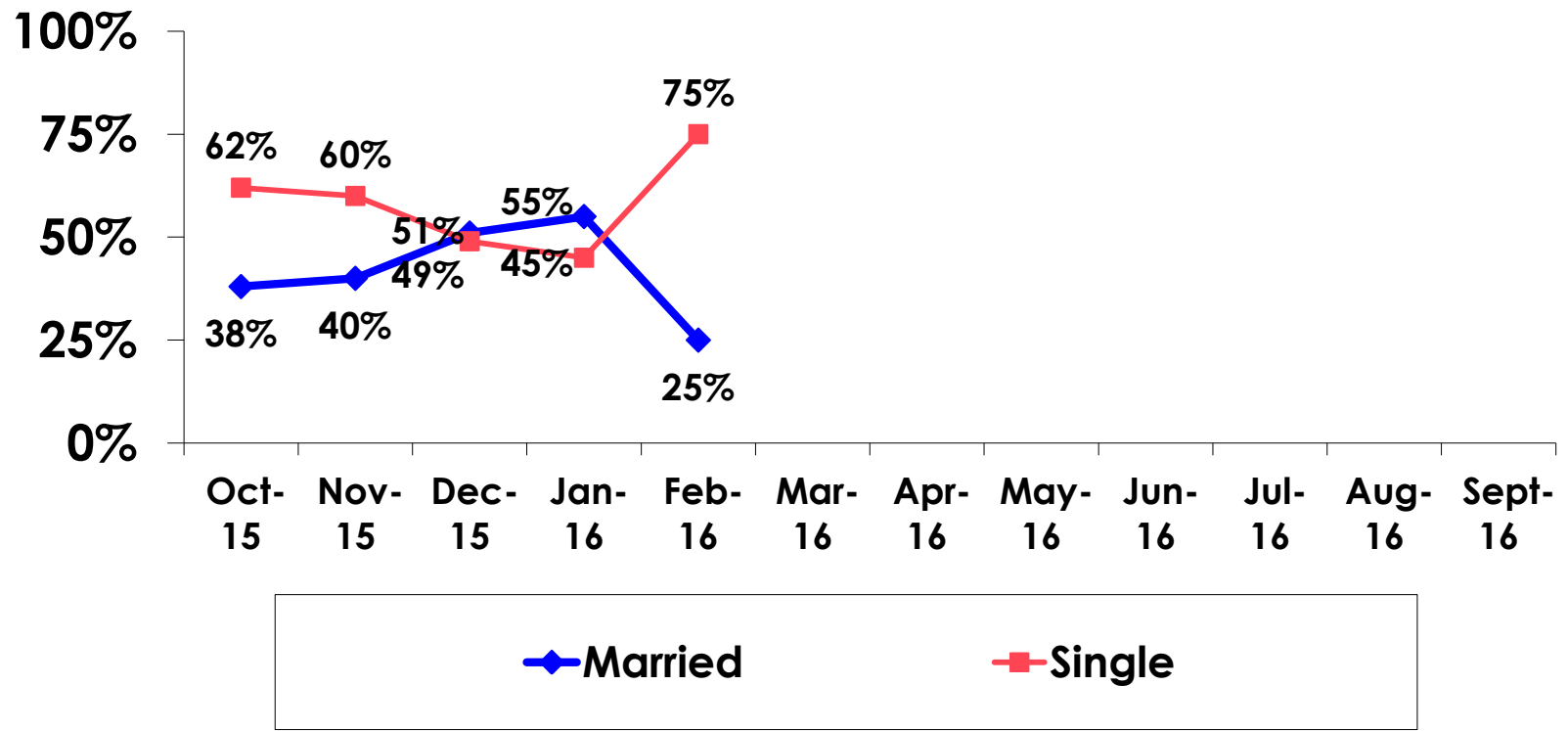
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

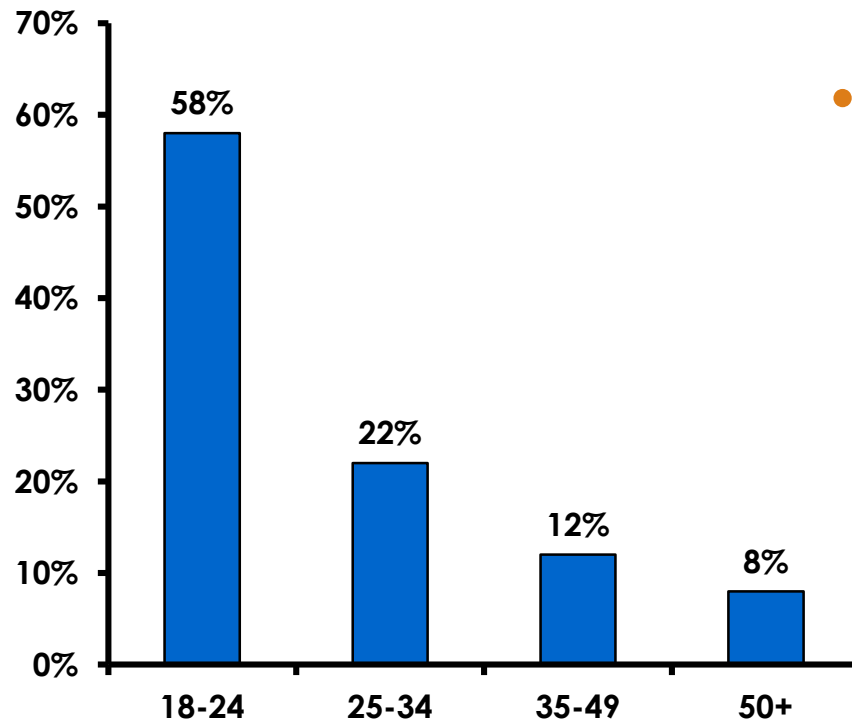


- A majority of the visitors surveyed this month were single.

MARITAL STATUS

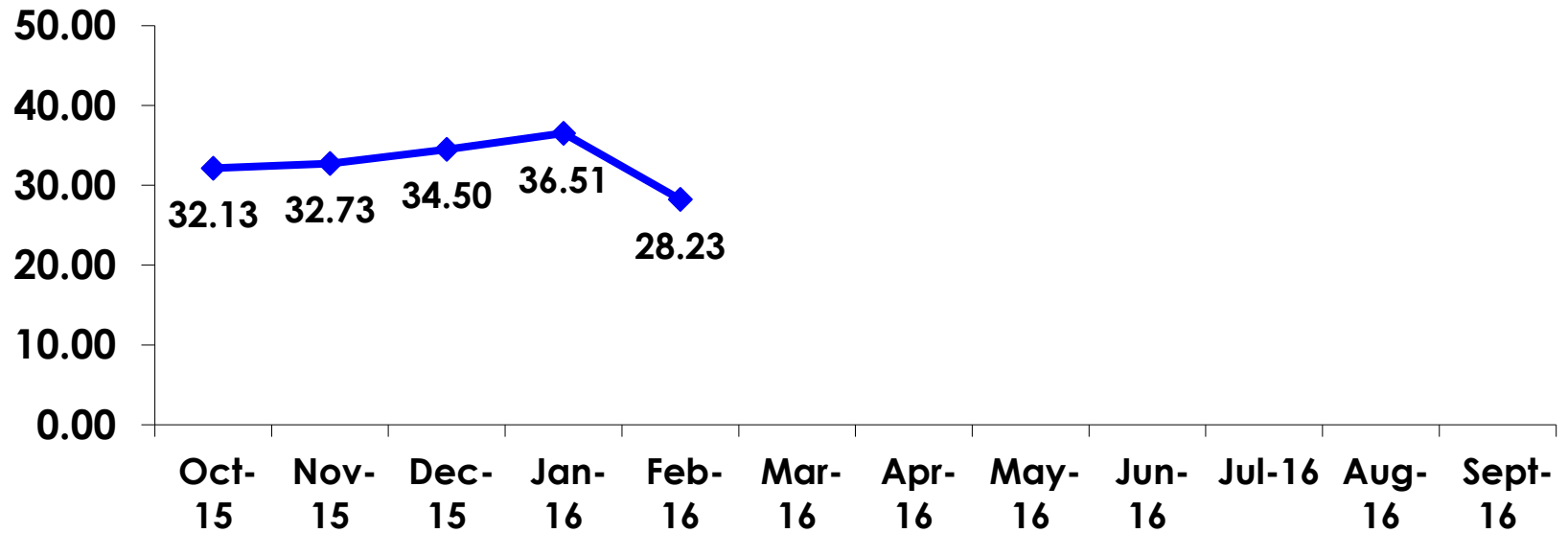


Age - Overall

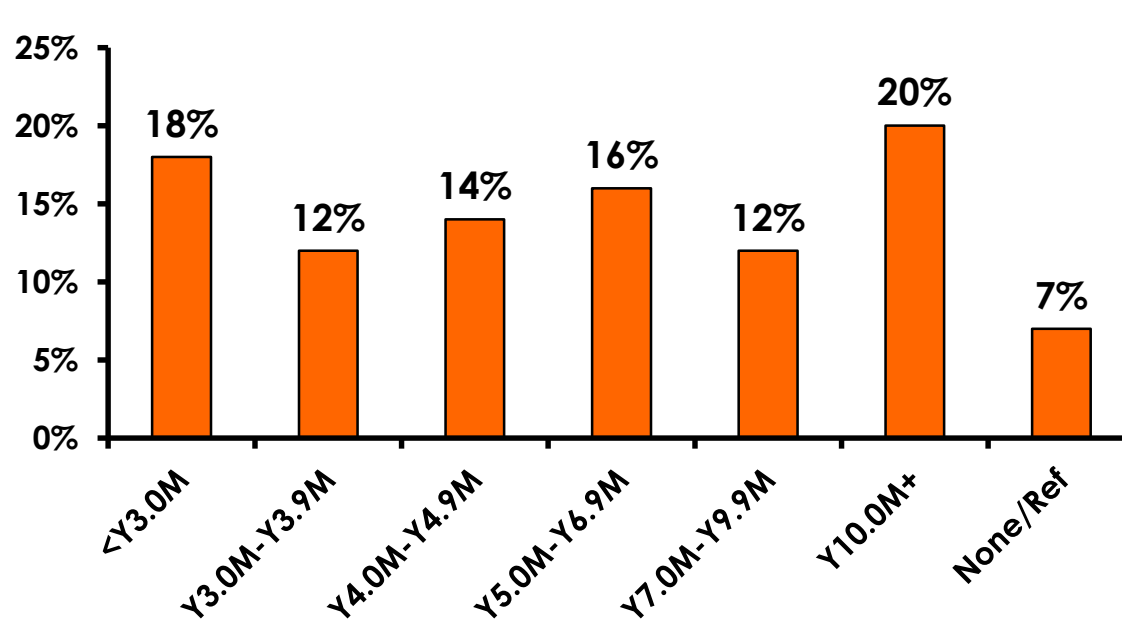


- The average age of the respondents is 28.23 years of age.

AVERAGE - AGE

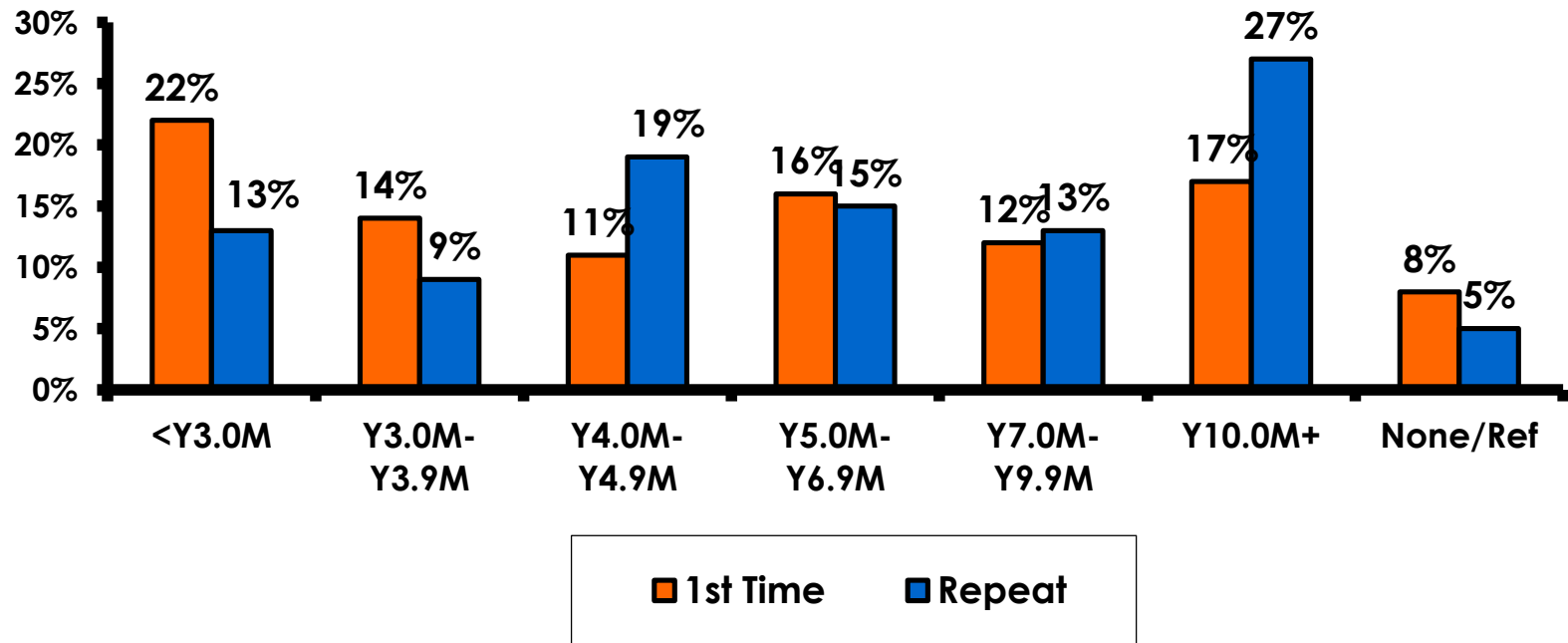


Personal Income



• ¥116.44=\$1

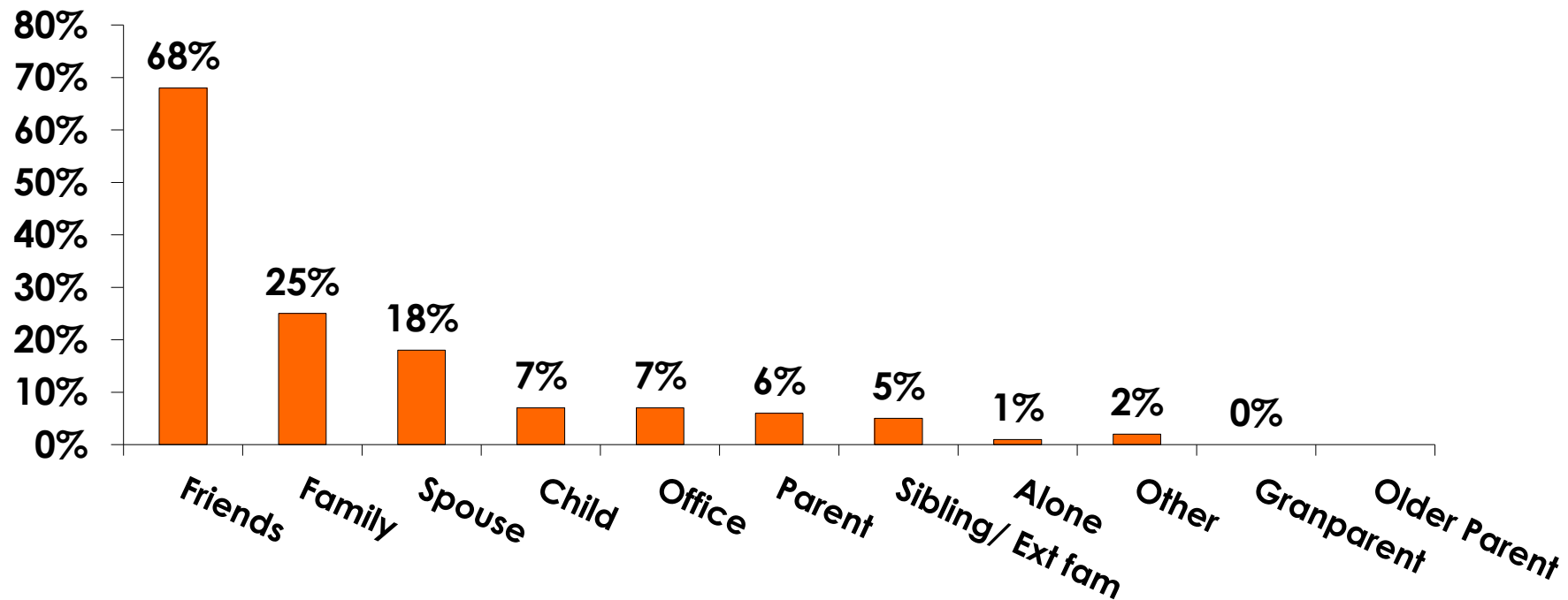
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	22	14	8	18	3	1	
		Column N %	7%	9%	6%	11%	4%	3%	
	Y2.0M-Y3.0M	Count	34	12	22	20	9	2	3
		Column N %	11%	8%	15%	12%	13%	6%	11%
	Y3.0M-Y4.0M	Count	37	14	23	13	17	4	3
		Column N %	12%	9%	16%	8%	24%	11%	11%
	Y4.0M-Y5.0M	Count	41	16	25	18	12	8	3
		Column N %	14%	10%	17%	11%	17%	22%	11%
	Y5.0M-Y7.0M	Count	47	28	19	20	13	8	6
		Column N %	16%	18%	13%	12%	18%	22%	21%
	Y7.0M-Y10.0M	Count	37	25	12	22	4	4	7
		Column N %	12%	16%	8%	13%	6%	11%	25%
	Y10.0M+	Count	60	31	29	35	10	9	6
		Column N %	20%	20%	20%	21%	14%	25%	21%
	No Income	Count	20	15	5	17	3		
		Column N %	7%	10%	3%	10%	4%		
Total	Count	298	155	143	163	71	36	28	

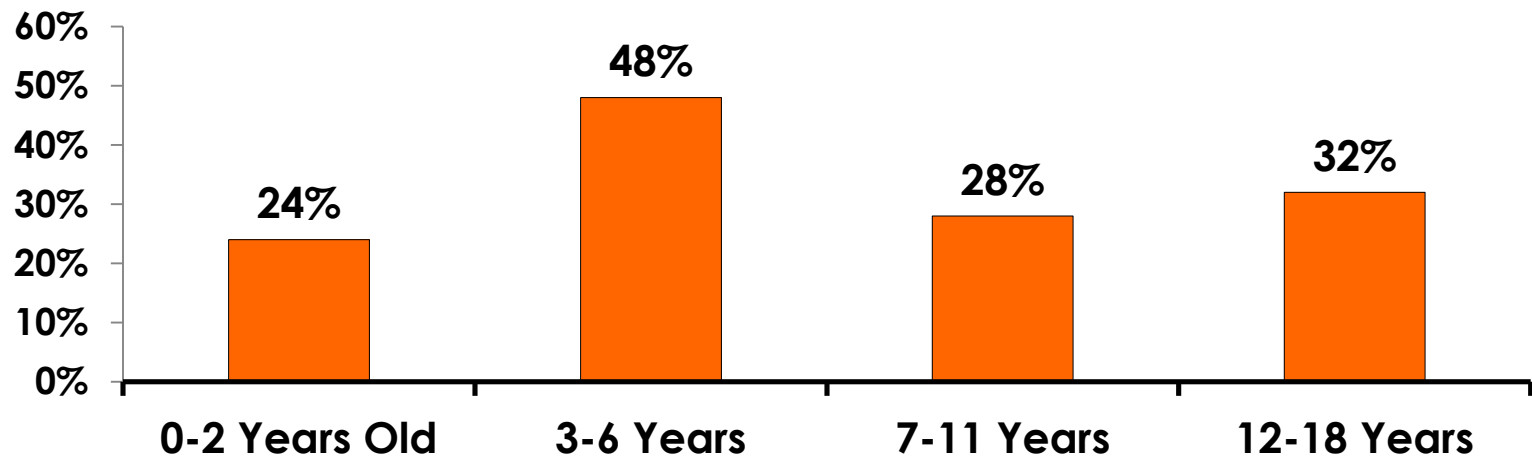
Travel Companions



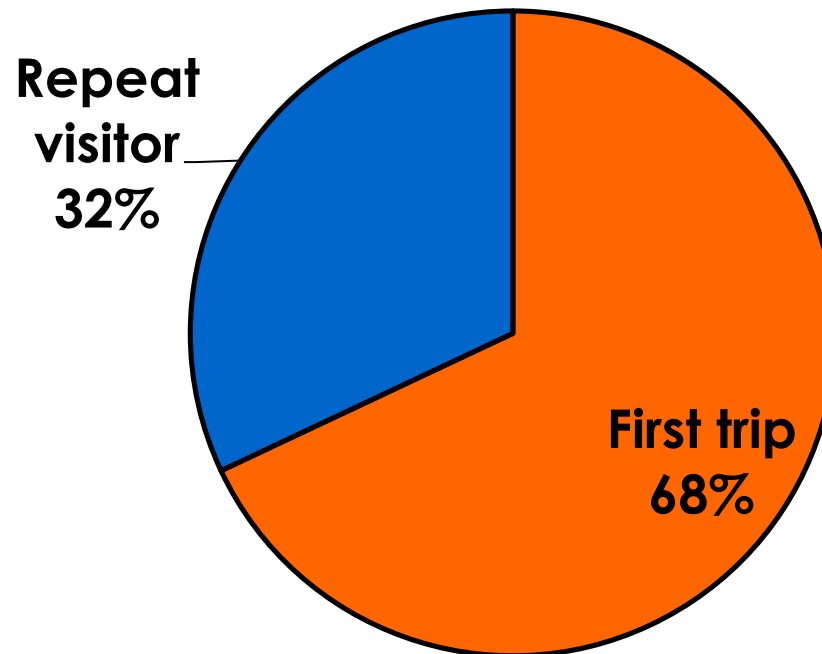
Number of Children Travel Party

N=25 total respondents traveling with children.

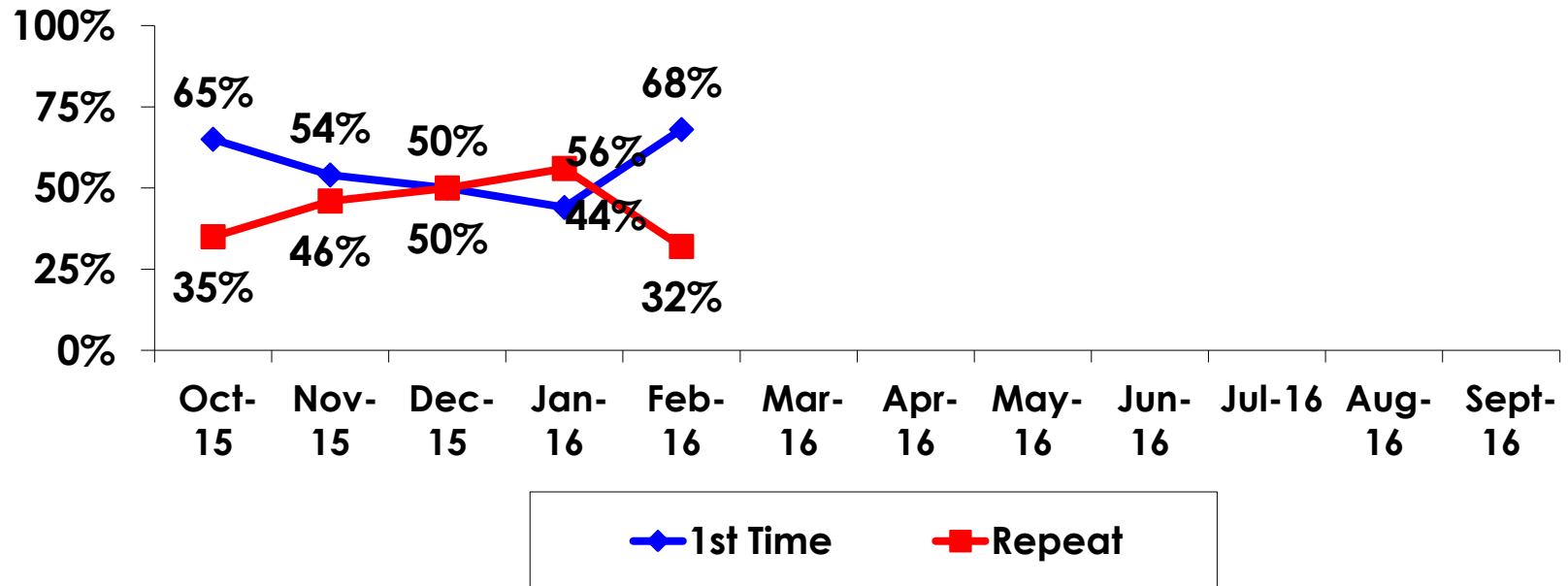
(Of those N=25 respondents, there is a total of 42 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



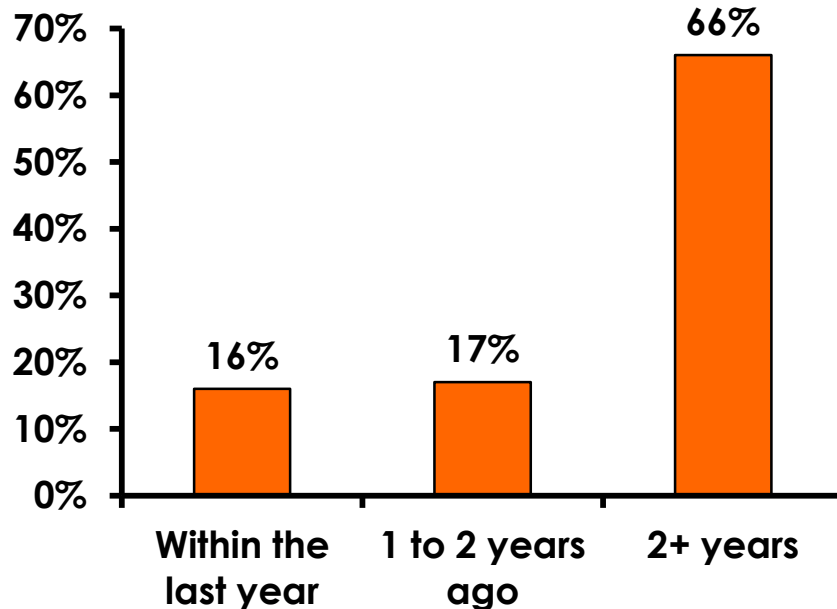
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	177	114	63
		Column N %	50%	48%	55%
	Female	Count	177	126	51
		Column N %	50%	53%	45%
	Total	Count	354	240	114
AGE	18-24	Count	206	160	46
		Column N %	58%	67%	40%
	25-34	Count	78	48	30
		Column N %	22%	20%	26%
	35-49	Count	41	17	24
		Column N %	12%	7%	21%
	50+	Count	29	15	14
		Column N %	8%	6%	12%
	Total	Count	354	240	114

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

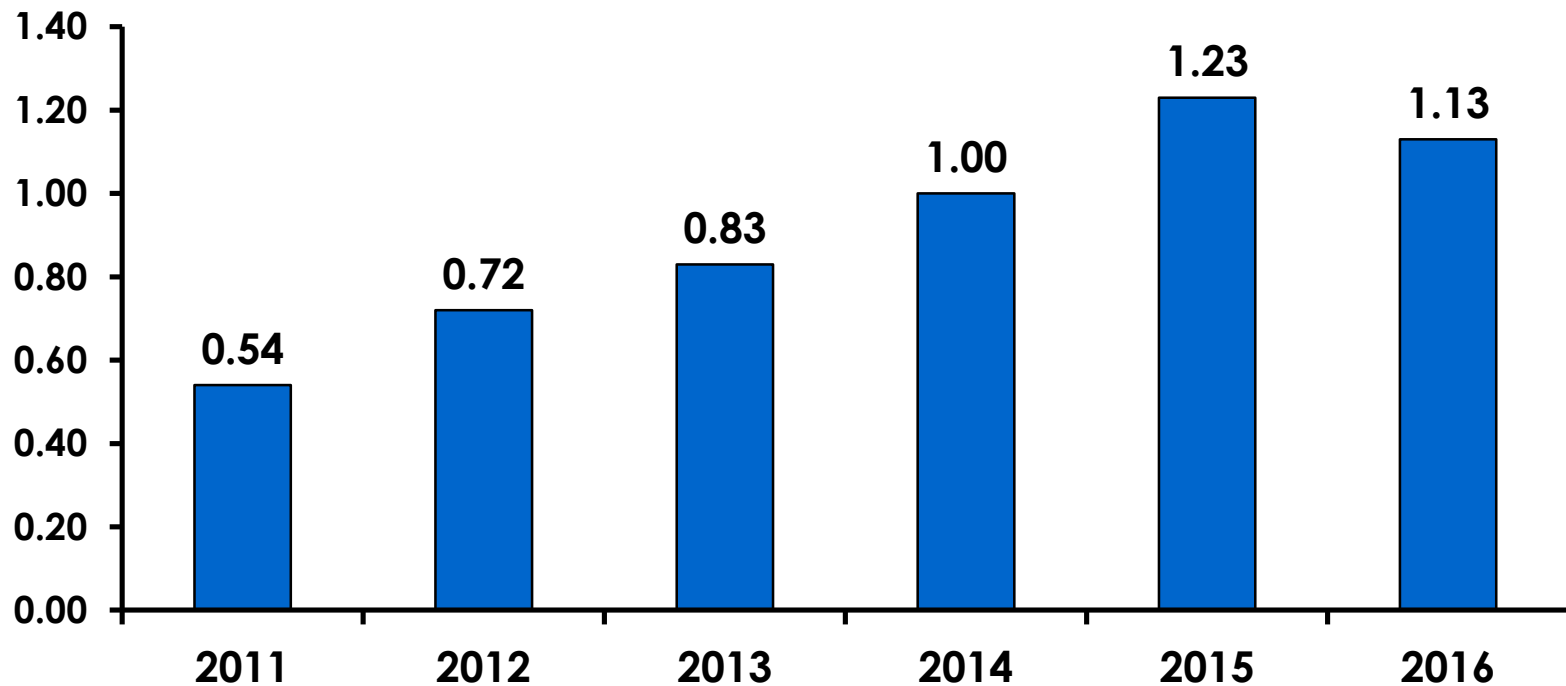
Repeat Visitors Last Trip

n = 110



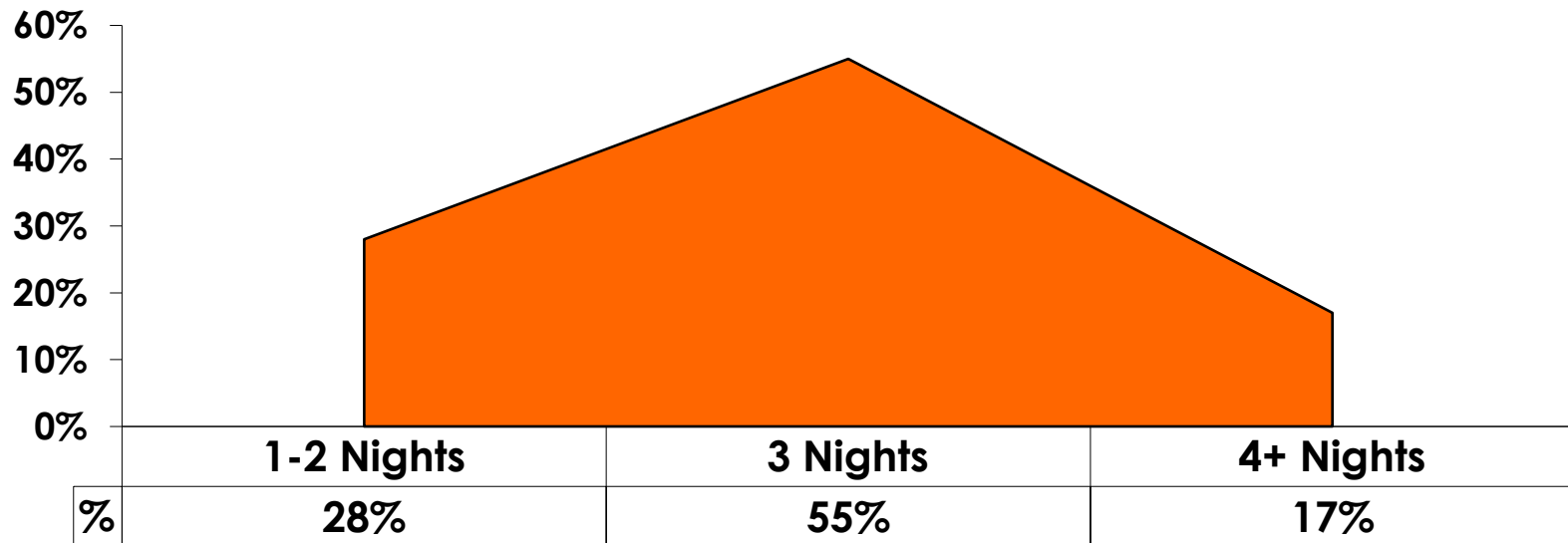
- The average repeat visitor has been to Guam 2.50 times.

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

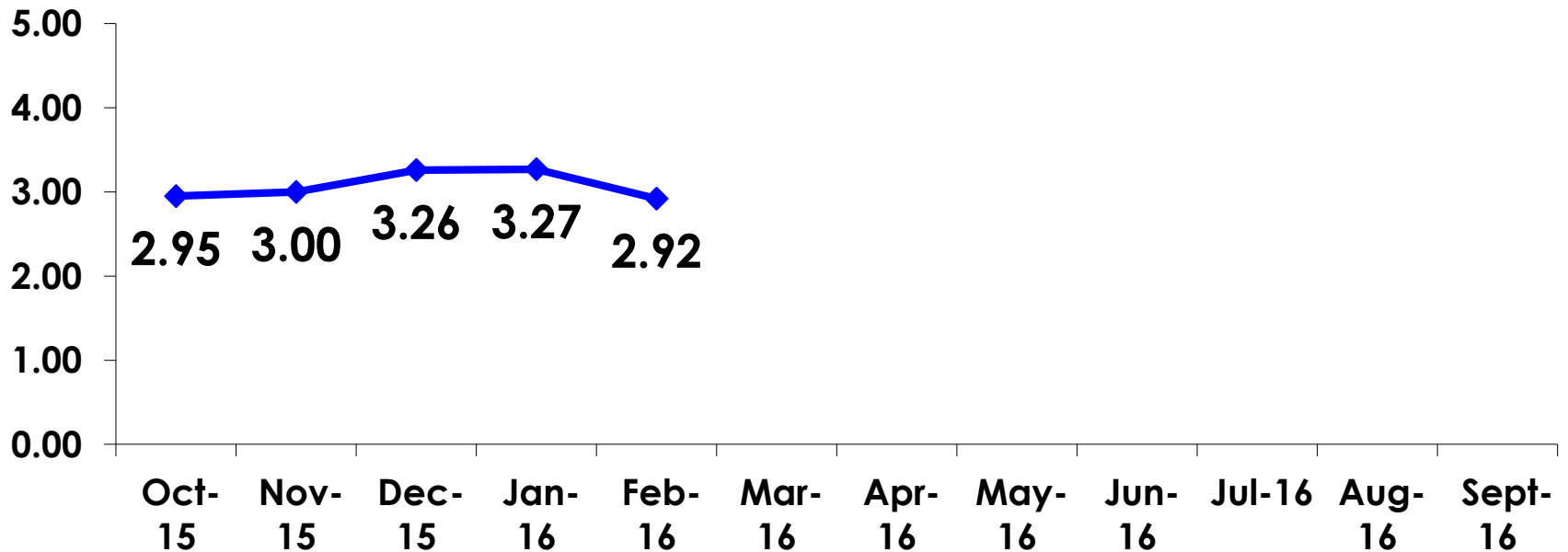


Length of Stay

Mean = 2.92 Days
Median = 3.0 Days



AVG LENGTH OF STAY

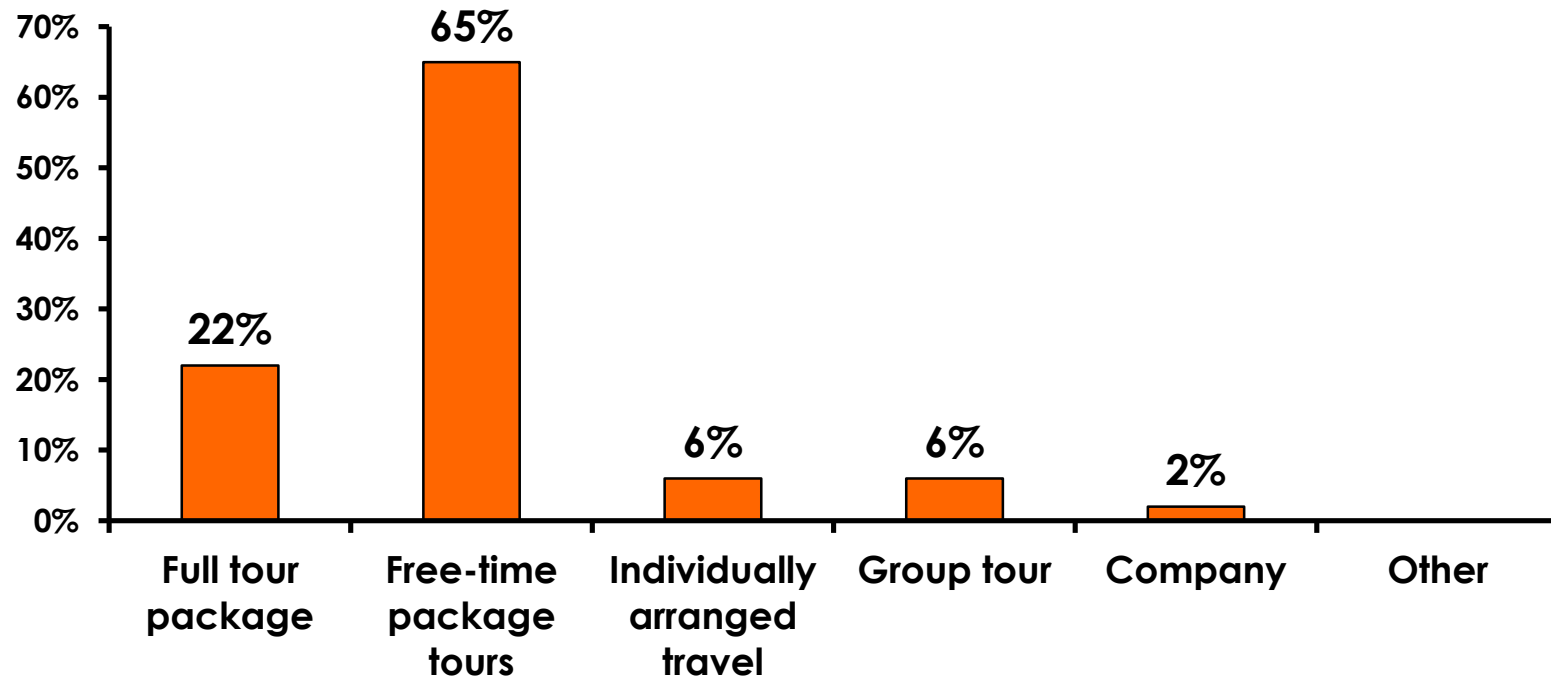


Occupation by Income

		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	50%	68%	47%	22%	37%	36%	54%	45%	90%	
	Office worker non-mgr	13%	5%	21%	35%	15%	13%	8%	12%		
	Engineer	9%		12%	8%	15%	19%	3%	10%		
	Salesperson	5%		6%	5%	7%	6%	3%	7%		
	Homemaker	4%			5%	7%	4%	5%	7%	5%	
	Manager	4%	5%		3%		6%	8%	10%		
	Skilled worker	3%		6%	8%	2%	4%		2%		
	Self-employed	3%				2%	6%	11%	2%		
	Professional/ Specialist	2%			5%	5%		3%	2%		
	Other	2%		6%		2%	2%		2%		
	Freeter	2%	14%			5%		3%			
	Govt- office worker non-mgr	2%			5%	2%			3%		
	Unemployed	1%	5%		3%					5%	
	Teacher	1%		3%			2%				
	Free-lancer	0%	5%								
	Executive (30+ employees)	0%						3%			
	Total	Count	345	22	34	37	41	47	37	60	20

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

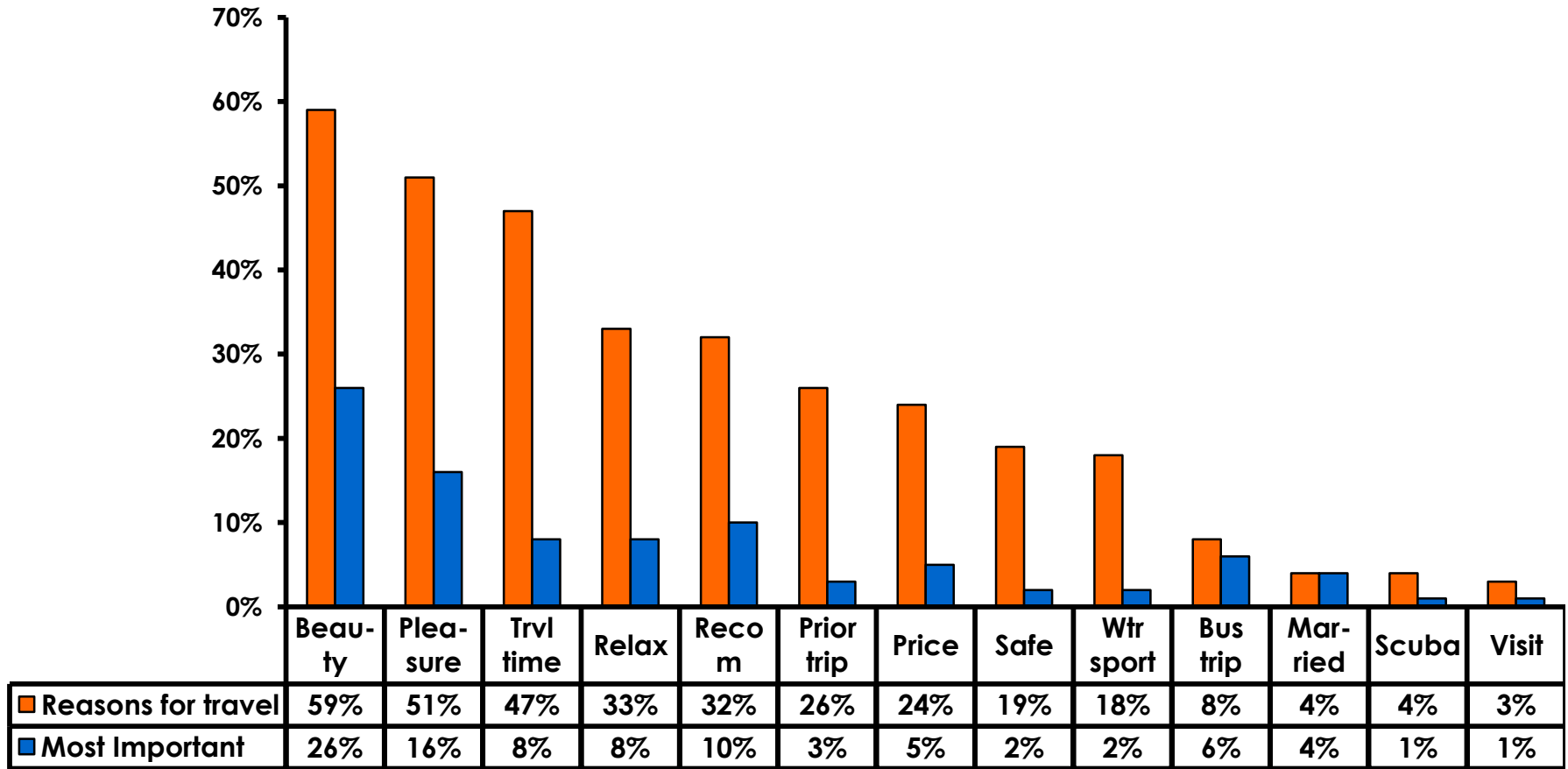


Accommodation by Income

Average length of stay: 2.92 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	18%	14%	18%	11%	20%	11%	19%	22%	15%	
Royal Orchid Guam	10%	5%	18%	8%		9%	5%	10%	40%	
Guam Reef & Olive Spa	7%		12%	16%	12%	6%	5%	2%		
Pacific Bay Hotel	7%	9%	3%	11%	20%	4%	3%	2%		
Bayview Hotel	6%	9%		5%	7%	6%	8%	2%	15%	
Oceanview Hotel	6%			8%	2%	6%	5%	5%	5%	
Hilton Guam Resort	5%	9%		8%	5%	13%	5%	3%		
Outrigger Guam Resort	5%		6%	14%	2%	9%	5%	8%		
PIC Club	5%		9%	3%	2%	2%	11%	5%		
Grand Plaza Hotel	5%	9%	3%	3%	2%	6%	5%	8%		
Fiesta Resort Guam	4%	5%	6%		5%	4%		8%	5%	
Onward Beach Resort	4%	9%	9%			4%	3%	7%		
Holiday Resort Guam	4%	5%	3%	3%	5%	6%	5%	2%	10%	
Verona Resort & Spa	3%		3%	3%	5%		5%	3%		
Hotel Nikko Guam	2%		3%	3%	2%	4%	3%	3%		
Hotel Santa Fe	2%	14%					3%			
Westin Resort Guam	1%					2%	3%	3%	5%	
Other	1%	5%	3%			2%		2%		
Lotte Hotel Guam	1%				2%		3%	3%		
Aqua Suites	1%		3%	3%			3%			
Condo	1%			3%	2%			2%		
Sheraton Laguna Guam	1%	9%				2%				
Pacific Star Resort & Spa	1%				2%	2%				
Days Inn (Maite)	0%								5%	
Hyatt Regency Guam	0%				2%					
Total	Count	353	22	33	37	41	47	37	60	20

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Recommendations, 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	59%	61%	56%	61%	48%	51%	67%	
	Pleasure	51%	55%	46%	44%	48%	42%	60%	
	Short travel time	47%	42%	53%	59%	45%	45%	49%	
	Relax	33%	26%	49%	39%	28%	31%	35%	
	Recomm- friend/family/trvl agnt	32%	41%	24%	15%	17%	34%	31%	
	Shopping	32%	31%	32%	27%	38%	23%	40%	
	Previous trip	26%	16%	32%	51%	41%	30%	21%	
	Price	24%	27%	24%	22%	10%	20%	29%	
	Safe	19%	17%	14%	20%	41%	21%	16%	
	Water sports	18%	22%	10%	17%	21%	19%	18%	
	Company/ Business Trip	8%	7%	8%	15%	3%	6%	10%	
	Other	5%	6%	3%		14%	5%	6%	
	Married/ Attn wedding	4%	1%	10%	7%	7%	7%	2%	
	Scuba	4%	5%	3%		3%	5%	3%	
	Visit friends/ Relatives	3%	2%	4%	5%	3%	2%	4%	
	Honeymoon	3%		10%	2%		5%	1%	
	Organized sports	2%	2%	1%	2%		2%	1%	
	Company Sponsored	1%	1%	1%	5%		2%	1%	
	Golf	1%	0%	1%		10%	2%	1%	
	Total	Count	352	204	78	41	29	175	177

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	59%	36%	68%	69%	61%	72%	64%	50%	30%	
	Pleasure	51%	45%	56%	50%	46%	57%	53%	53%	55%	
	Short travel time	47%	27%	53%	42%	49%	47%	58%	53%	40%	
	Relax	33%	18%	29%	42%	29%	38%	33%	38%	25%	
	Recomm- friend/family/trvl agnt	32%	23%	32%	19%	27%	26%	39%	37%	60%	
	Shopping	32%	18%	32%	50%	37%	36%	25%	40%	10%	
	Previous trip	26%	27%	18%	22%	37%	30%	33%	33%	15%	
	Price	24%	14%	15%	31%	27%	21%	28%	23%	15%	
	Safe	19%	23%	12%	22%	17%	30%	25%	22%	5%	
	Water sports	18%	14%	32%	17%	15%	17%	17%	17%		
	Company/ Business Trip	8%	9%	12%	8%	7%	2%	3%	3%	5%	
	Other	5%	9%	3%	3%	7%	6%	3%	8%		
	Married/ Attn wedding	4%	5%		8%	5%	11%		5%	5%	
	Scuba	4%		6%	3%	5%	2%	6%	7%		
	Visit friends/ Relatives	3%		3%	8%		4%	3%	5%		
	Honeymoon	3%	5%		3%	5%	6%	3%	2%		
	Organized sports	2%	5%		3%	2%	2%		3%		
	Company Sponsored	1%				2%		3%	2%		
	Golf	1%					4%		5%		
	Total	Count	352	22	34	36	41	47	36	60	20

SECTION 3 **EXPENDITURES**

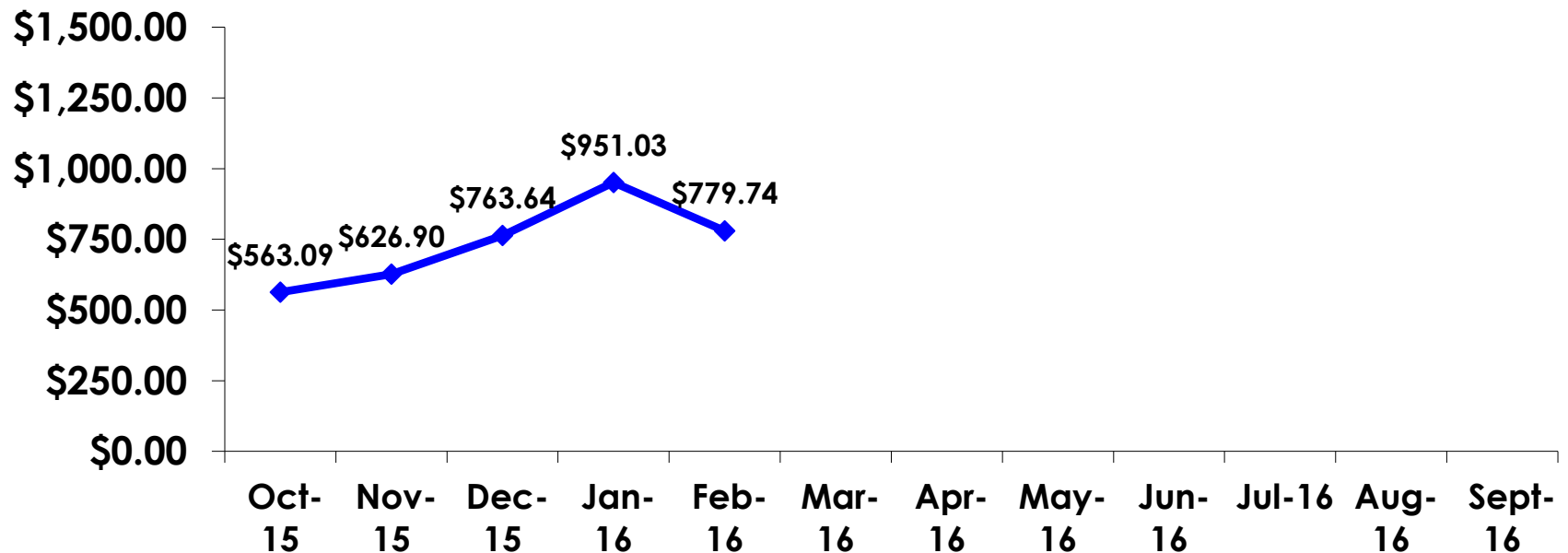
Prepaid Expenditures

¥116.44/US\$1

- \$1,356.48 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$15,459 = maximum (highest amount recorded for the entire sample)
- \$779.74 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$737.27

Breakdown of Prepaid Expenditures

¥116.44=\$1

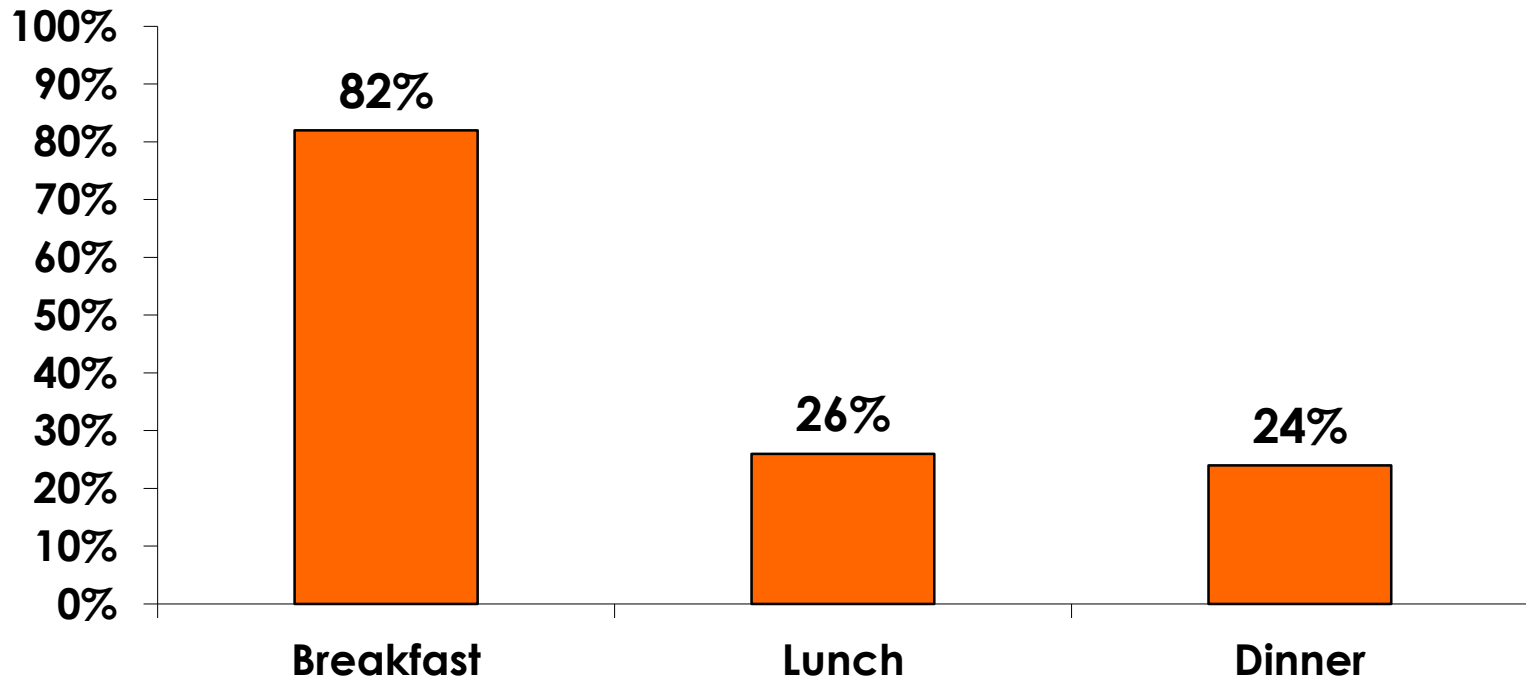
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,145.67
Air & Accommodation w/ daily meal package	\$2,859.84
Air only	\$1,002.90
Accommodation only	\$592.58
Accommodation w/ daily meal only	\$858.81
Food & Beverages in Hotel	\$103.06
Ground transportation – Japan	\$50.48
Ground transportation – Guam	\$48.61
Optional tours/ activities	\$226.76
Other expenses	\$508.86
Total Prepaid	\$1,356.48

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=34

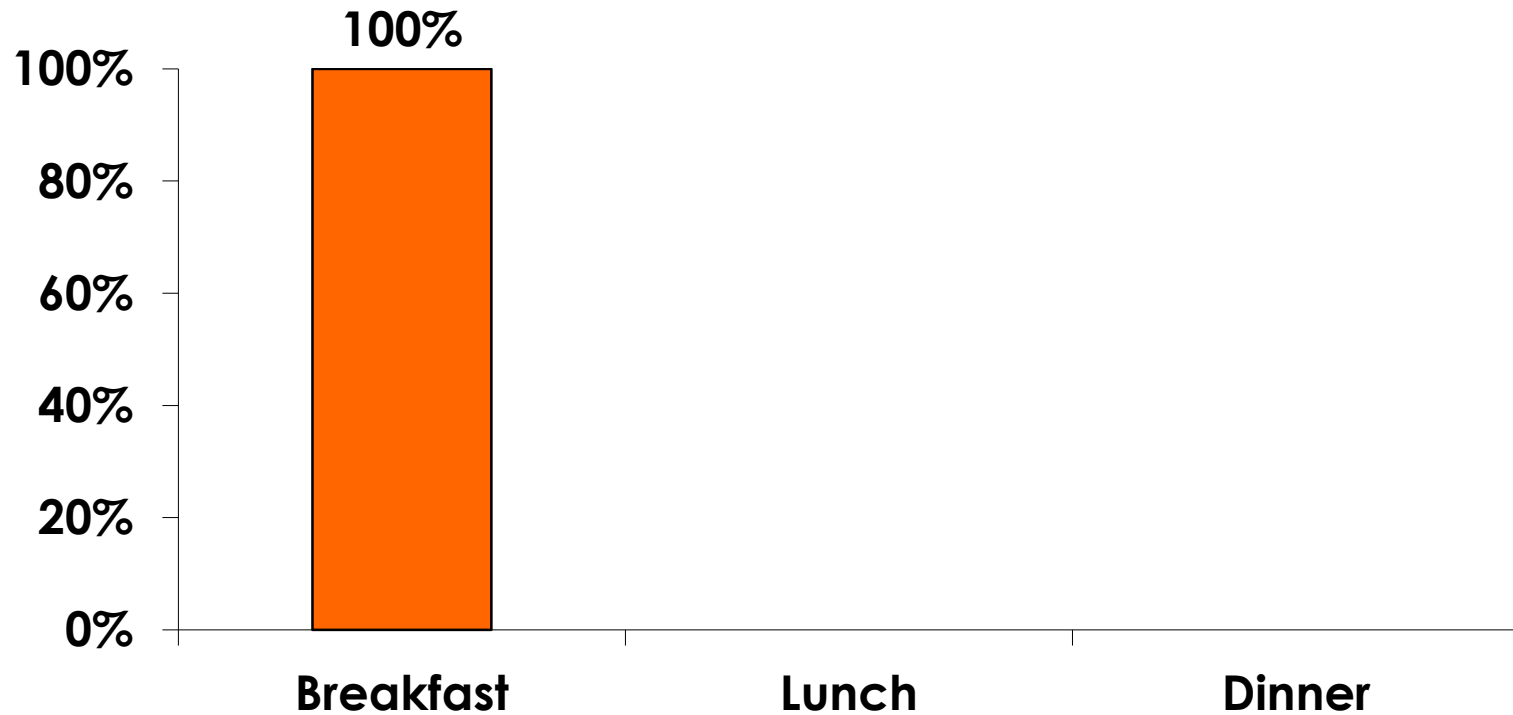


Mean=\$2,859.84 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

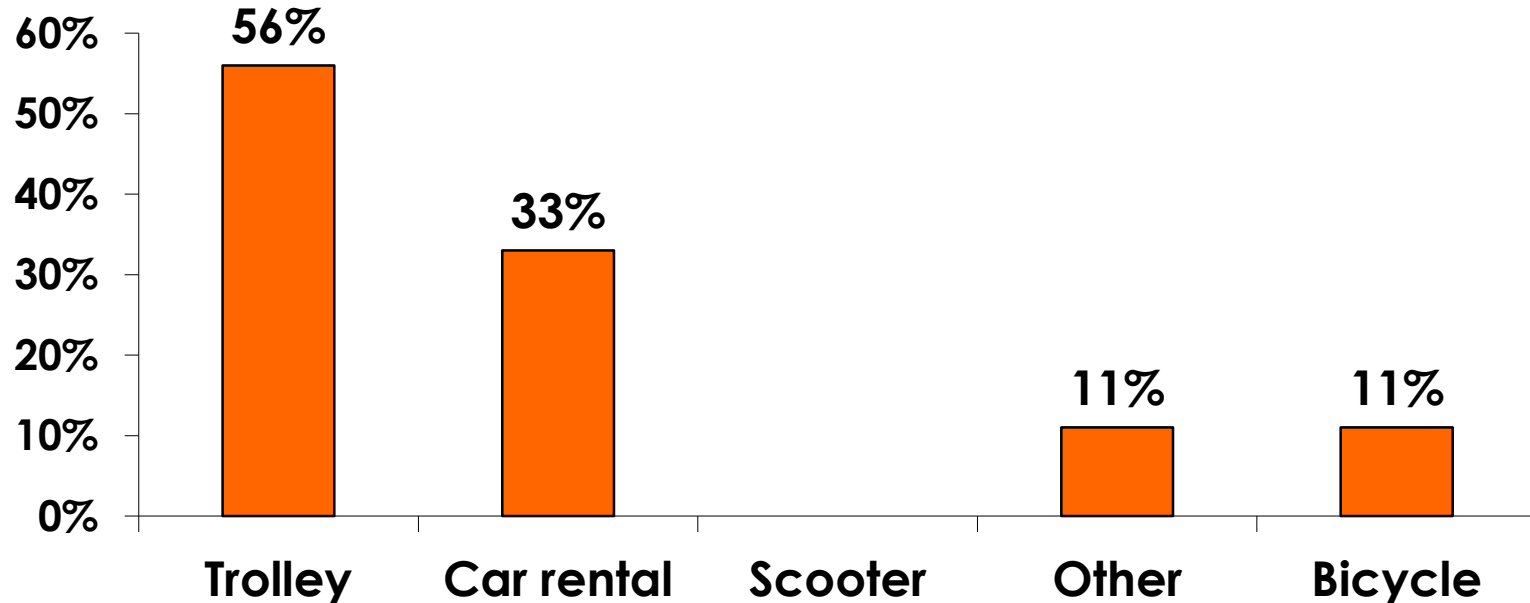
n=1



Mean=\$858.81 per travel party

PREPAID GROUND TRANSPORTATION

n=9



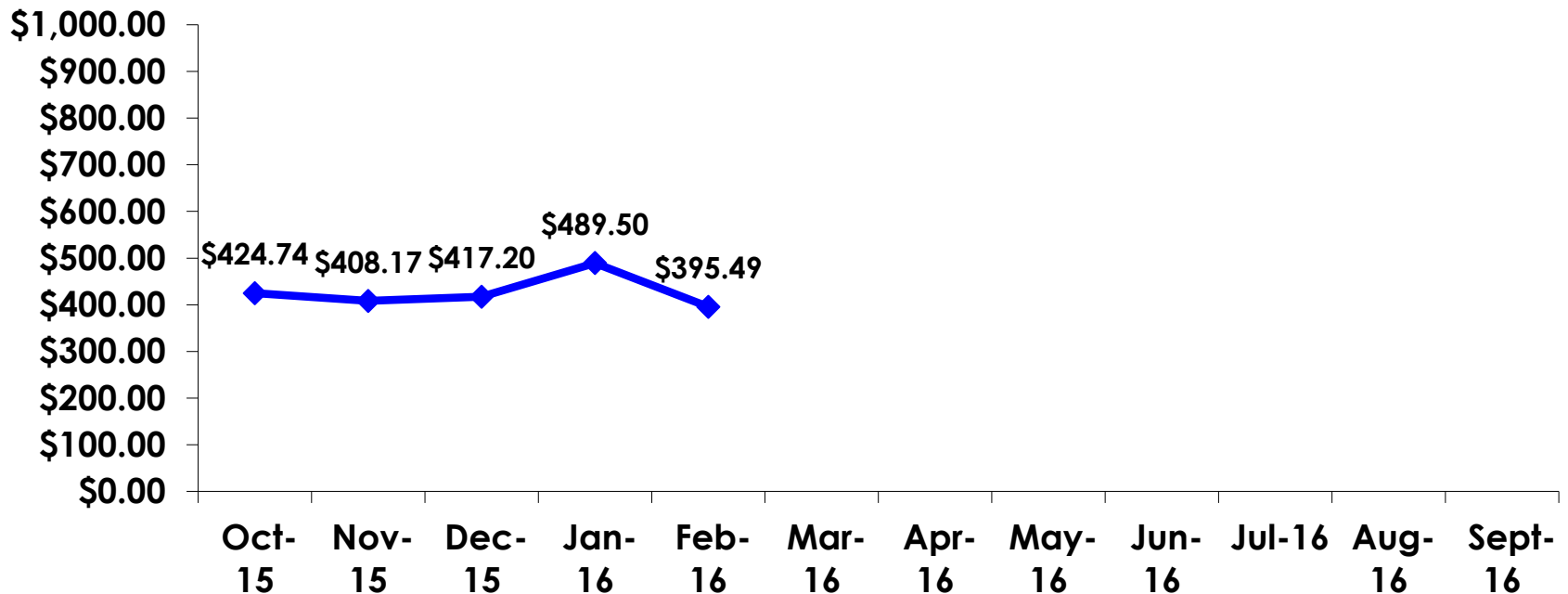
Mean=\$48.61 per travel party

On-Island Expenditures

- \$559.99 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,800 = Maximum (highest amount recorded for the entire sample)
- \$395.49 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

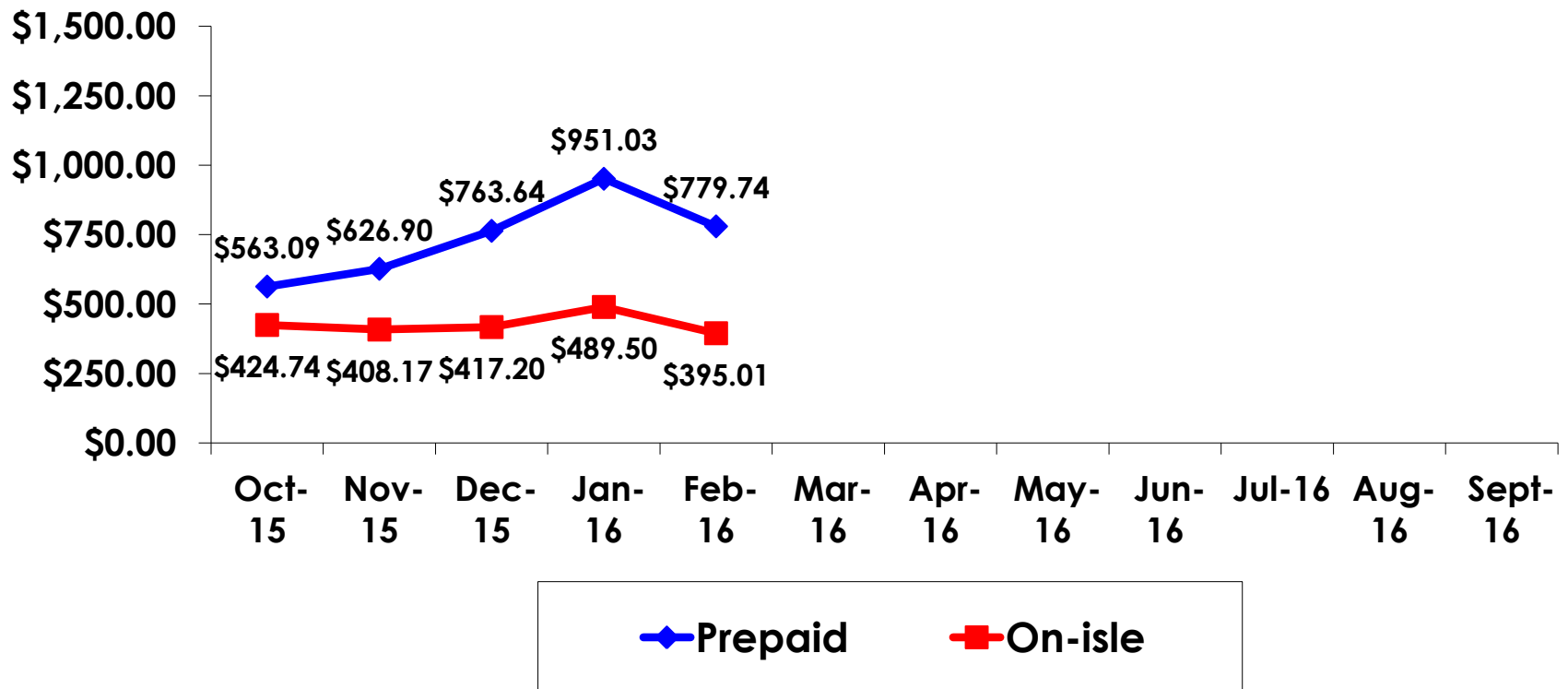


YTD = \$427.01

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$737.27

On-Isle YTD = \$427.01



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	\$395.49	\$375.16	\$415.81	\$369.24	\$332.52	\$353.78	\$544.75	\$312.30	\$505.02	\$879.56	\$459.36
	Median	\$350	\$350	\$336	\$350	\$320	\$333	\$500	\$284	\$450	\$400	\$400
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$70	\$0	\$0	\$0	\$100
	Maximum	\$6,800	\$1,250	\$6,800	\$1,200	\$1,143	\$1,167	\$1,250	\$850	\$2,300	\$6,800	\$1,250

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$27.92	\$37.19	\$18.66	\$14.17	\$29.60	\$45.98	\$95.59
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.84	\$39.68	\$24.01	\$27.12	\$32.23	\$33.90	\$61.41
	Median	\$10	\$20	\$0	\$10	\$0	\$10	\$30
F&B RESTRNT	Mean	\$75.64	\$96.69	\$54.59	\$53.83	\$74.21	\$129.27	\$158.62
	Median	\$20	\$50	\$0	\$20	\$0	\$100	\$70
OPT TOUR	Mean	\$59.86	\$71.11	\$48.61	\$45.48	\$76.06	\$73.90	\$98.62
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$109.50	\$96.19	\$122.81	\$68.02	\$141.72	\$165.61	\$238.10
	Median	\$20	\$15	\$20	\$18	\$50	\$50	\$0
GIFT- OTHER	Mean	\$80.56	\$90.75	\$70.37	\$47.89	\$79.62	\$153.66	\$211.83
	Median	\$30	\$50	\$30	\$25	\$43	\$100	\$150
TRANS	Mean	\$8.46	\$12.33	\$4.58	\$5.94	\$7.91	\$19.76	\$11.83
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$166.21	\$164.82	\$167.60	\$90.36	\$212.68	\$241.95	\$472.93
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$559.99	\$608.76	\$511.23	\$352.81	\$654.04	\$864.02	\$1,348.93
	Median	\$400	\$440	\$400	\$345	\$500	\$600	\$730

On-Island Expenditures

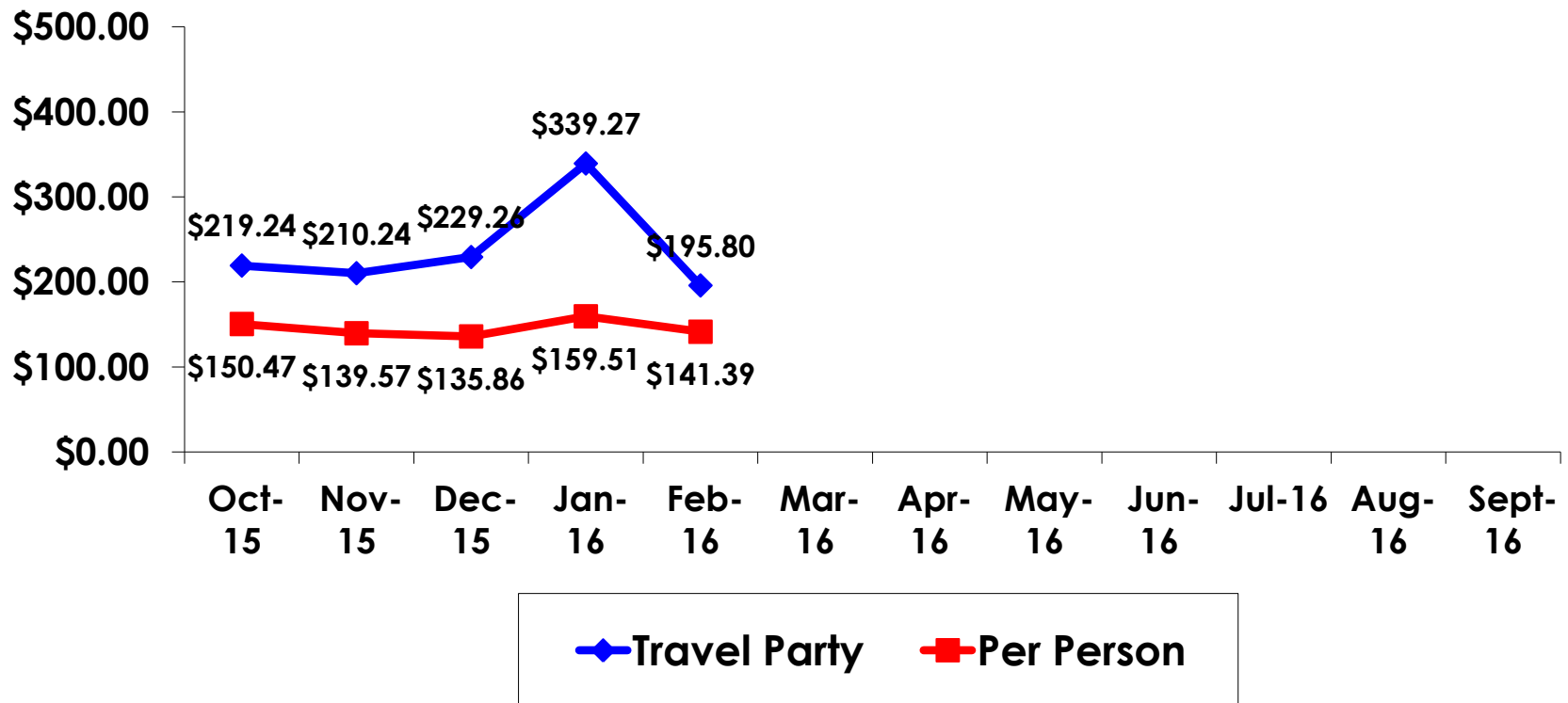
First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$27.92	\$24.62	\$34.88
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.84	\$26.82	\$42.40
	Median	\$10	\$10	\$15
F&B RESTRNT	Mean	\$75.64	\$65.74	\$96.48
	Median	\$20	\$18	\$35
OPT TOUR	Mean	\$59.86	\$58.05	\$63.68
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$109.50	\$83.10	\$165.07
	Median	\$20	\$10	\$50
GIFT- OTHER	Mean	\$80.56	\$63.38	\$116.73
	Median	\$30	\$20	\$55
TRANS	Mean	\$8.46	\$6.35	\$12.89
	Median	\$0	\$0	\$0
OTHER	Mean	\$166.21	\$105.28	\$294.48
	Median	\$0	\$0	\$0
TOTAL	Mean	\$559.99	\$433.35	\$826.61
	Median	\$400	\$398	\$500

ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$238.75

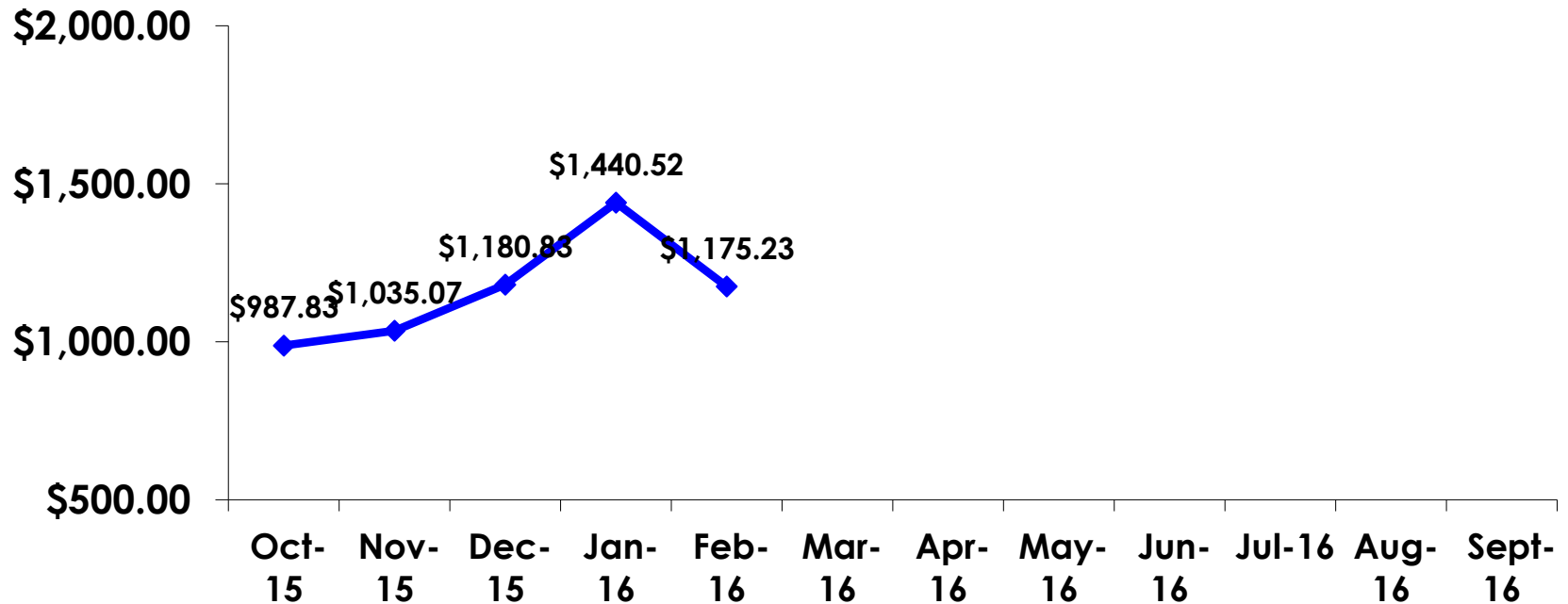
Per Person YTD = \$145.33



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,175.23 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,545 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



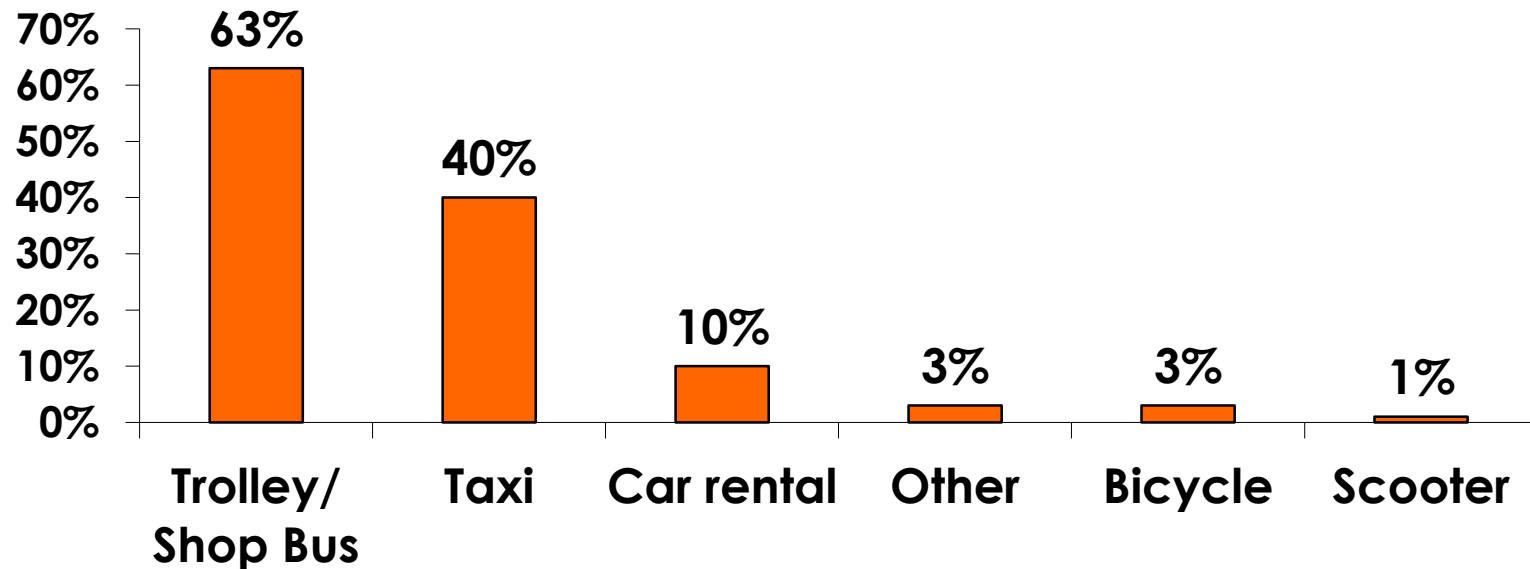
YTD=\$1,164.28

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$27.92
Food & beverage in fast food restaurant/convenience store	\$31.84
Food & beverage at restaurants or drinking establishments outside a hotel	\$75.64
Optional tours and activities	\$59.86
Gifts/ souvenirs for yourself/companions	\$109.50
Gifts/ souvenirs for friends/family at home	\$80.56
Local transportation	\$8.46
Other expenses not covered	\$166.21
Average Total	\$559.99

Local Transportation

n=70



Mean=\$8.46 per travel party

Guam Airport Expenditures

- \$29.95 = Mean
- \$5 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

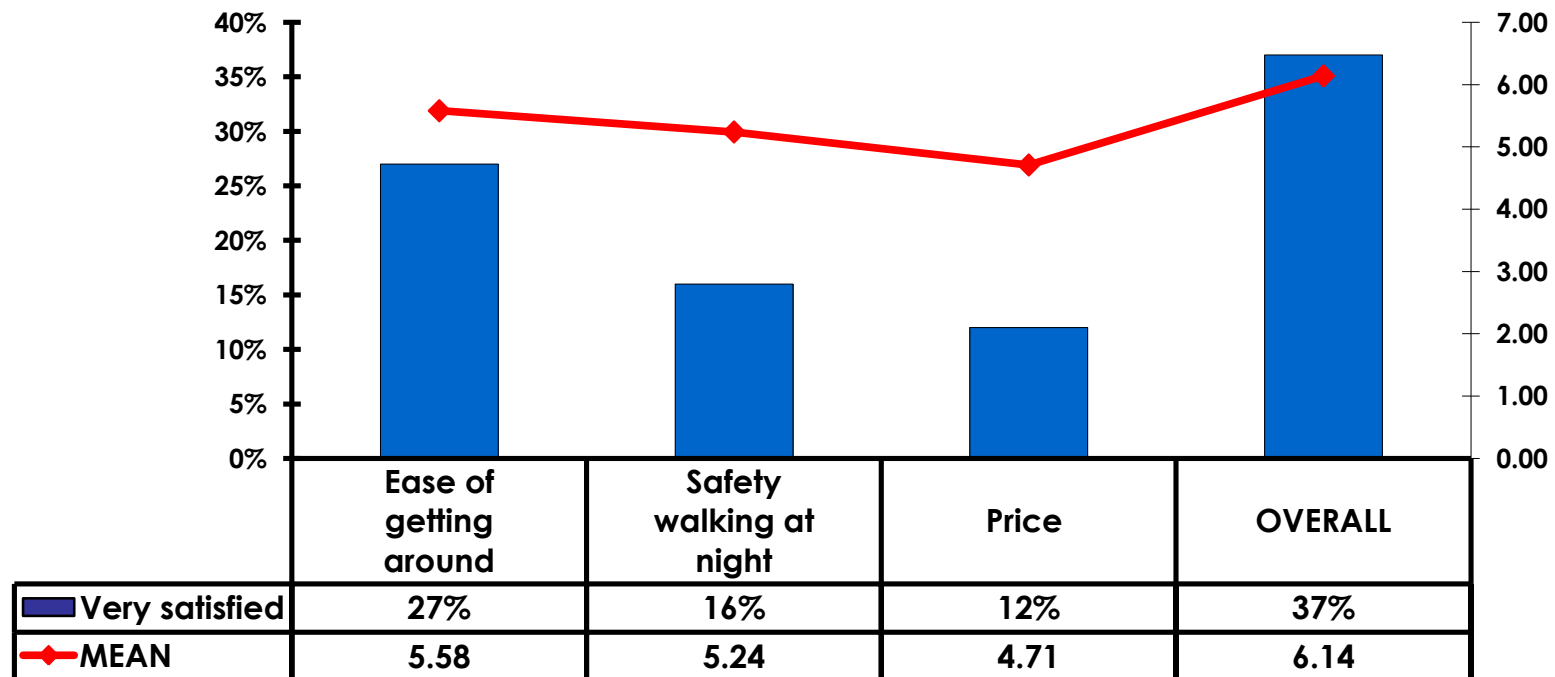
	MEAN \$
Food & Beverages	\$6.94
Gifts/Souvenirs Self	\$12.14
Gifts/Souvenirs Others	\$10.88
Total	\$29.95

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

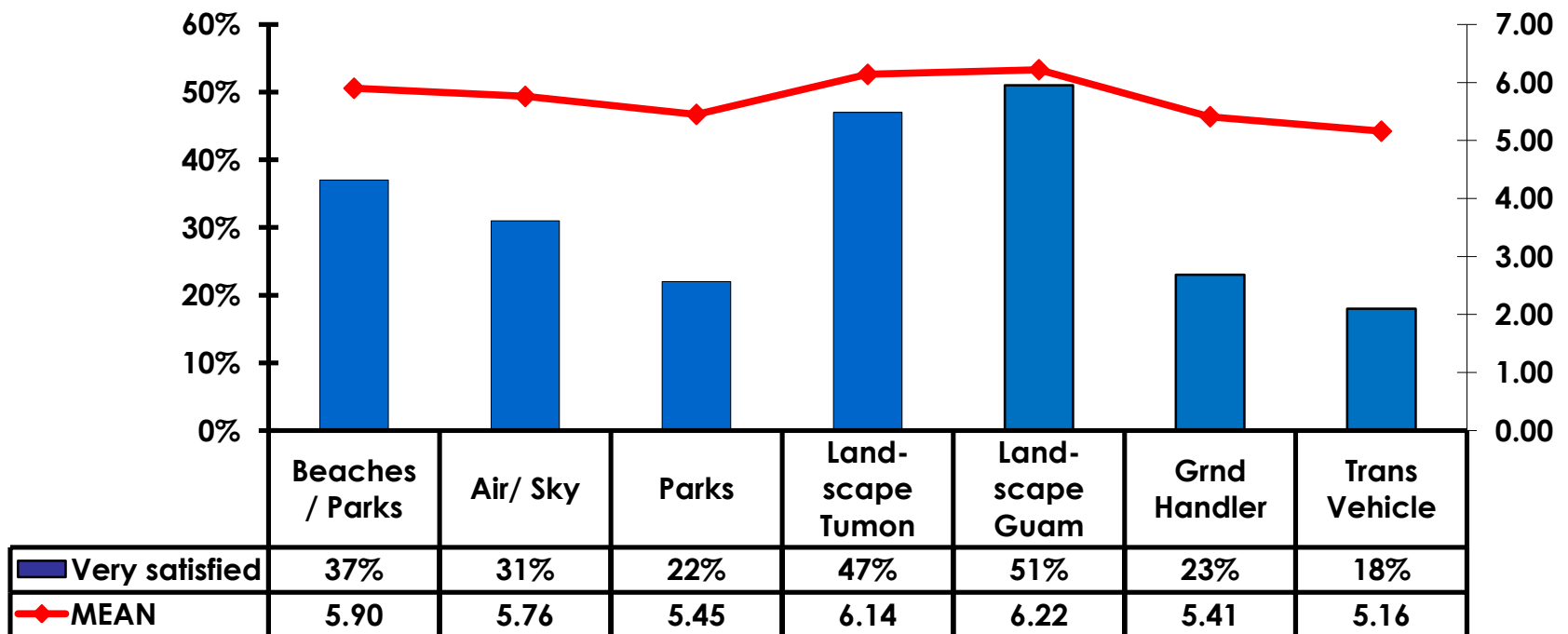
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

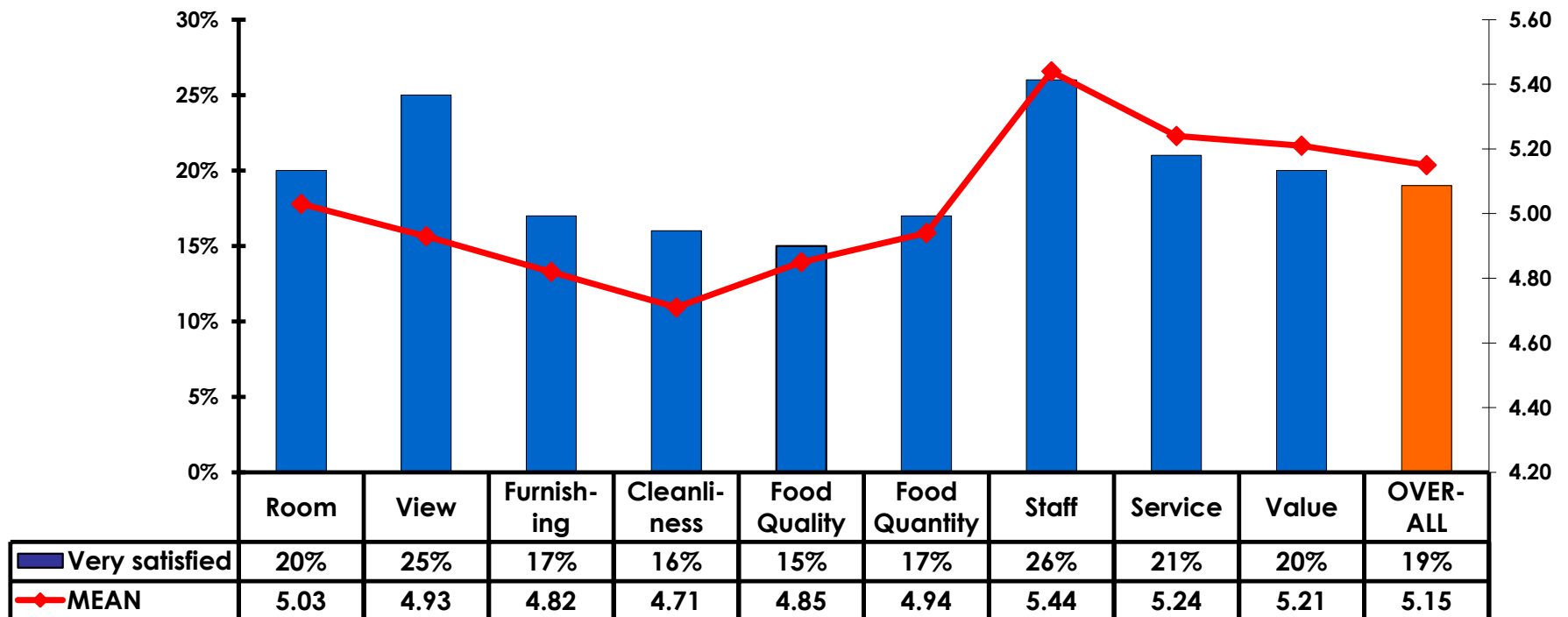
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

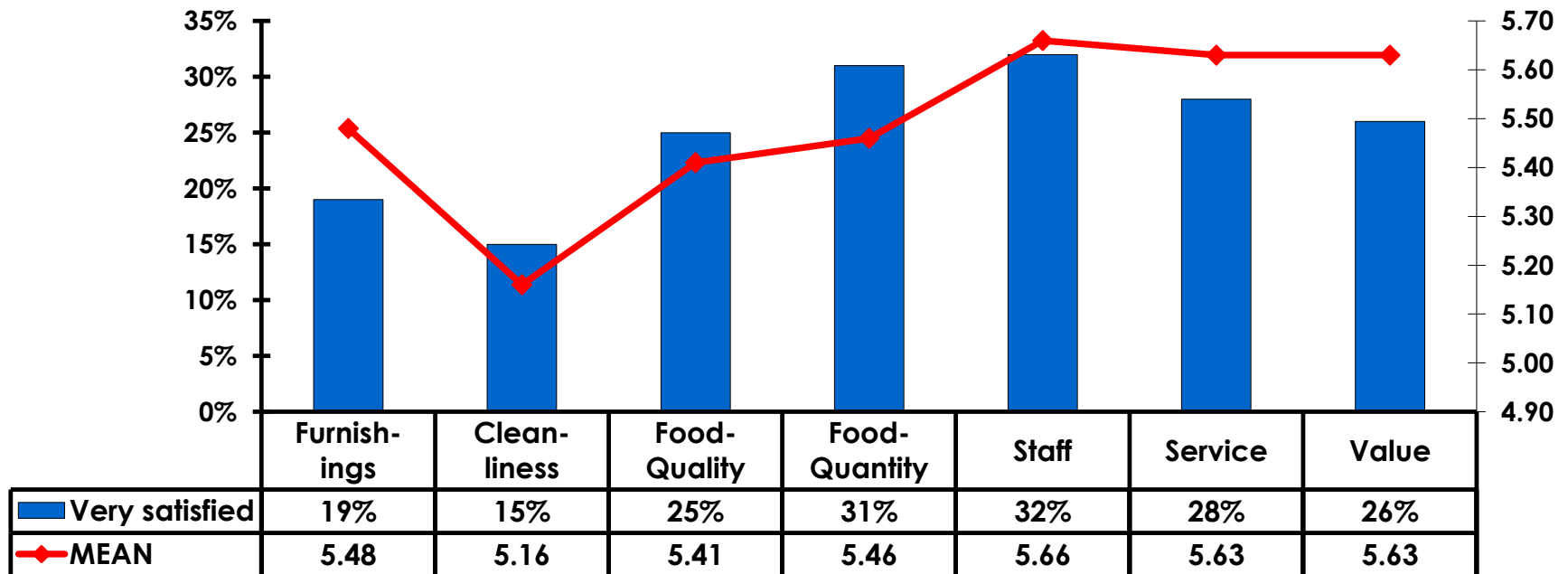
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

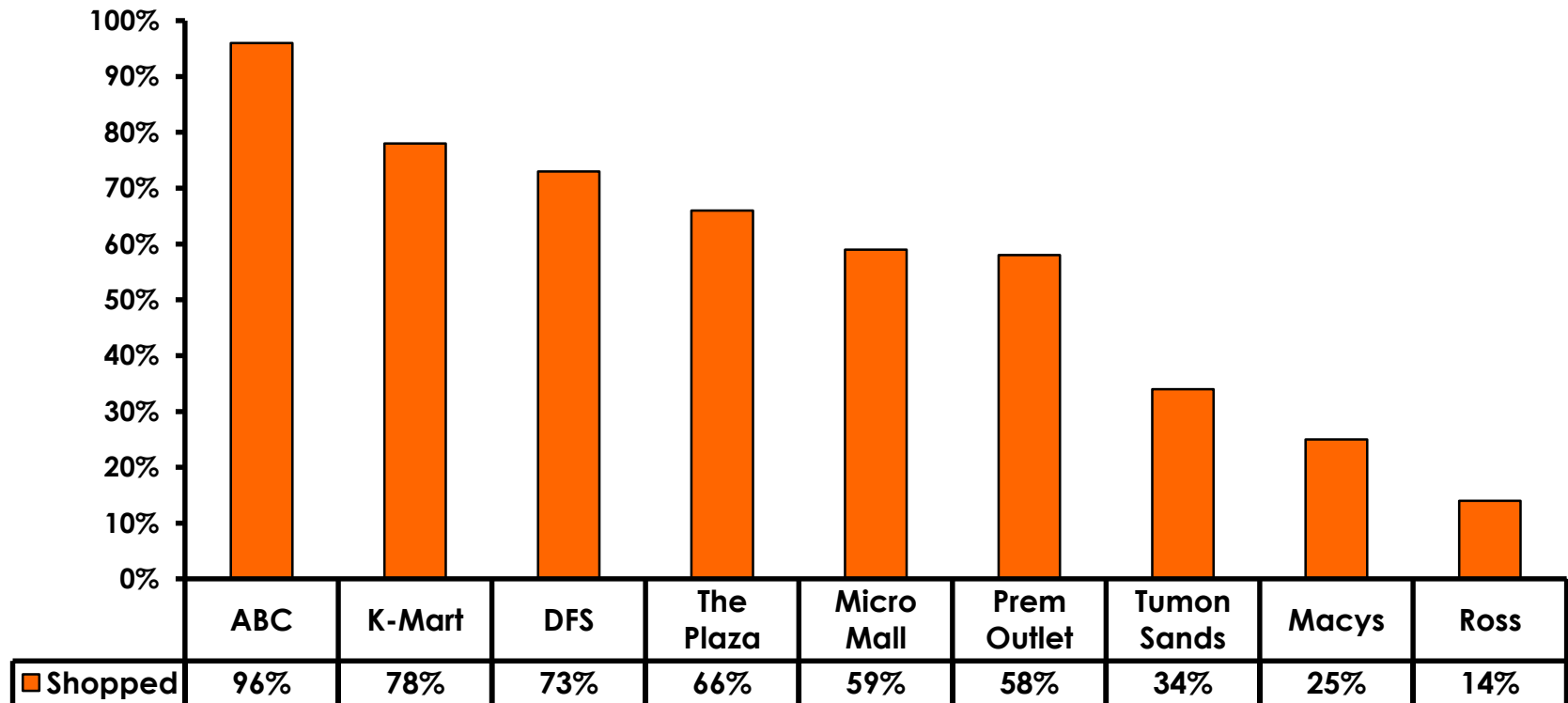
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



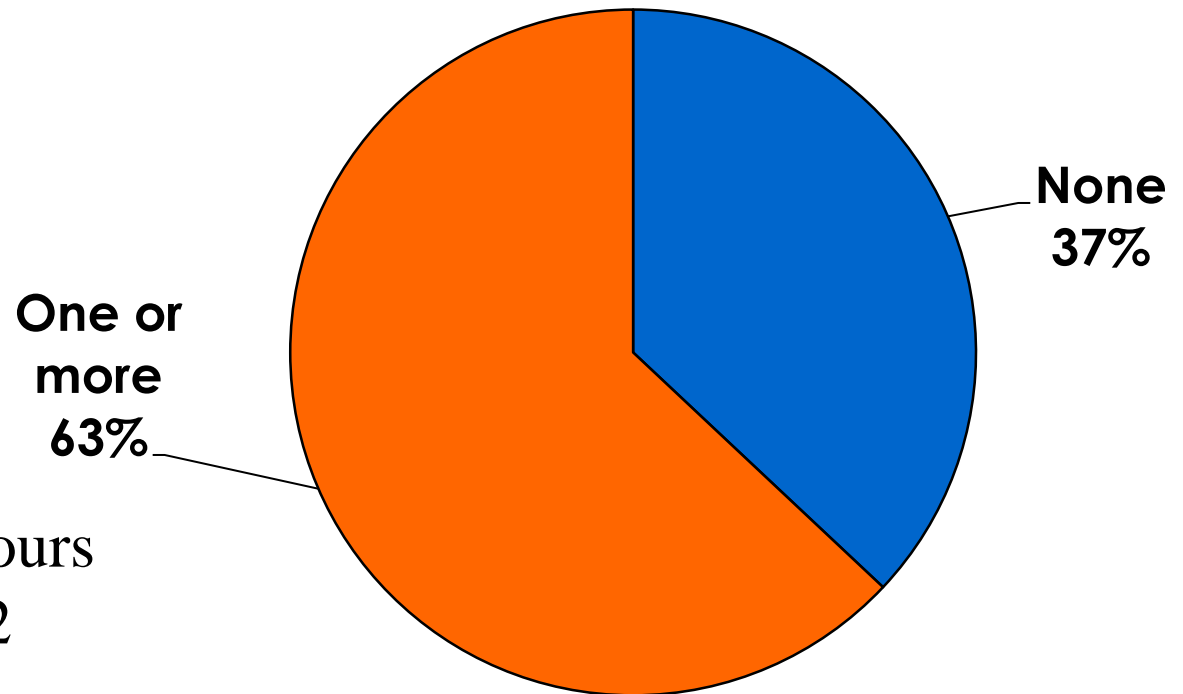
Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 65%	Score of 6 to 7 = 62%
Score of 4 to 5 = 31%	Score of 4 to 5 = 33%
Score 1 to 3 = 3%	Score 1 to 3 = 5%
MEAN = 5.68	MEAN = 5.64

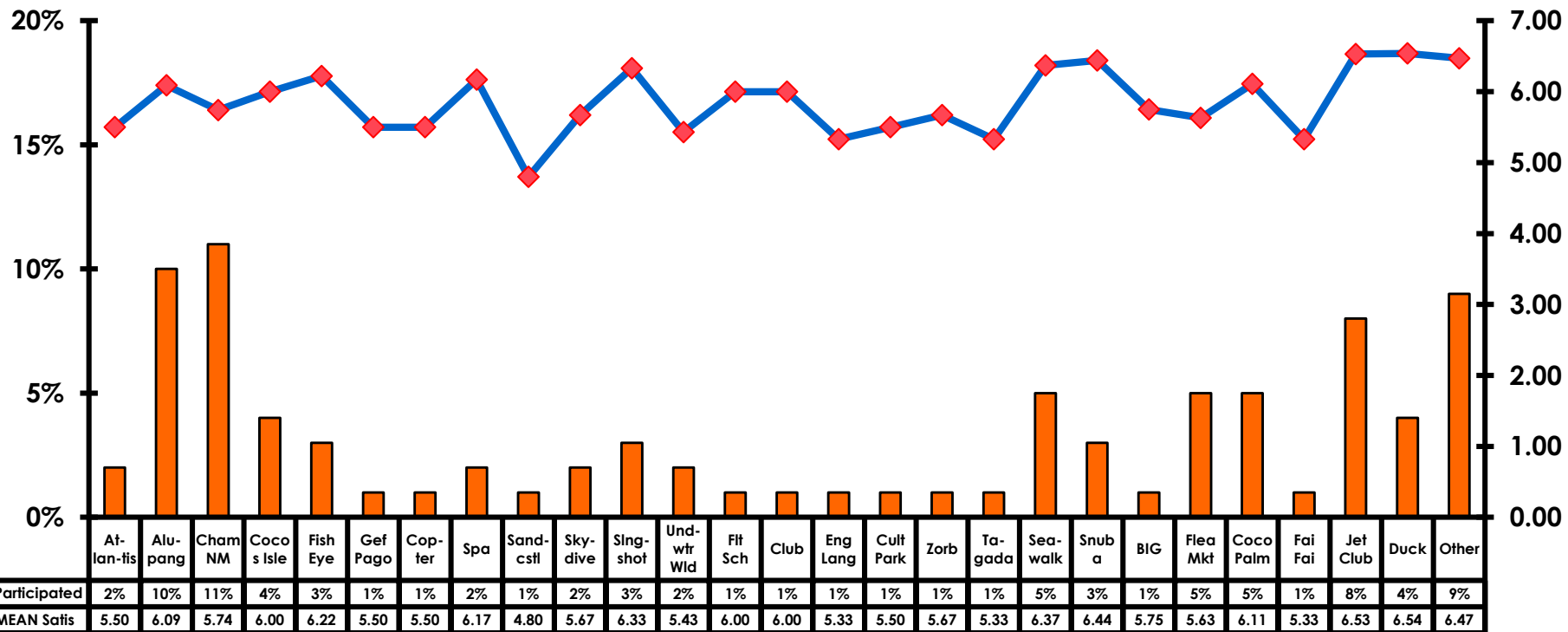
Optional Tour Participation



- Average number of tours participated in is 1.02

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 = 66%	Score of 6 to 7 = 63%
Score of 4 to 5 = 33%	Score of 4 to 5 = 36%
Score 1 to 3 = 0%	Score 1 to 3 = 2%
MEAN = 5.73	MEAN = 5.62

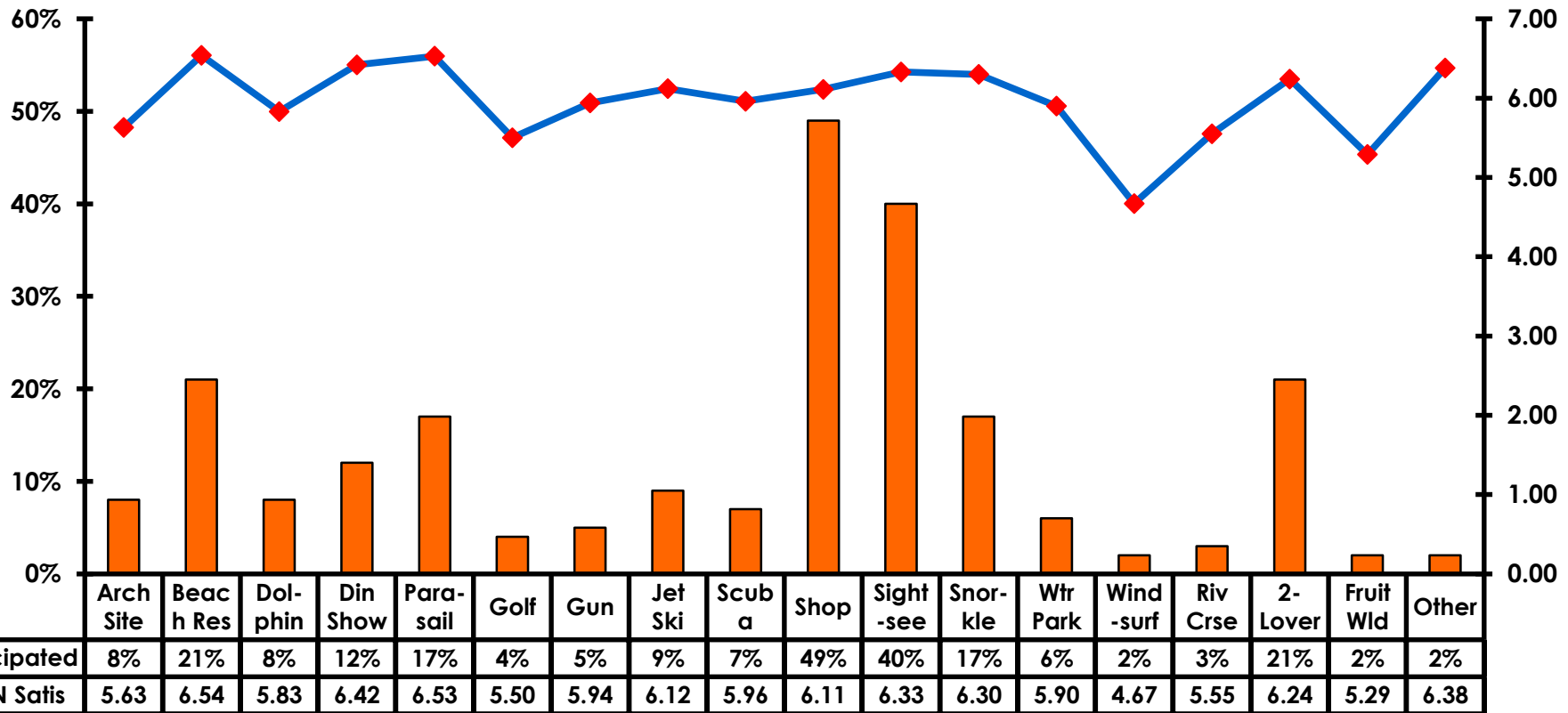
Night Tours Satisfaction

7pt Rating Scale

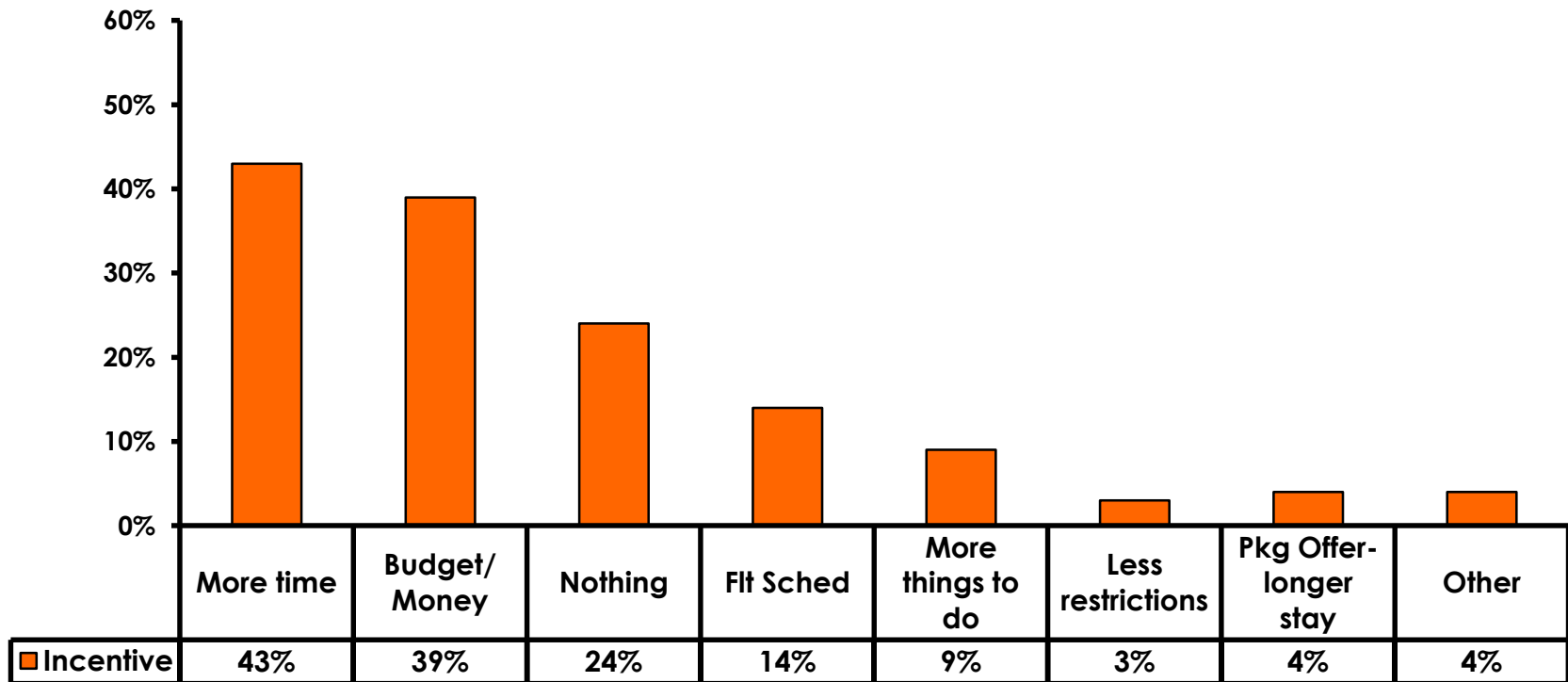
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 39%	Score of 6 to 7 = 39%
Score of 4 to 5 = 59%	Score of 4 to 5 = 58%
Score 1 to 3 = 2%	Score 1 to 3 = 1%
MEAN = 5.02	MEAN = 5.03

Satisfaction with Other Activities



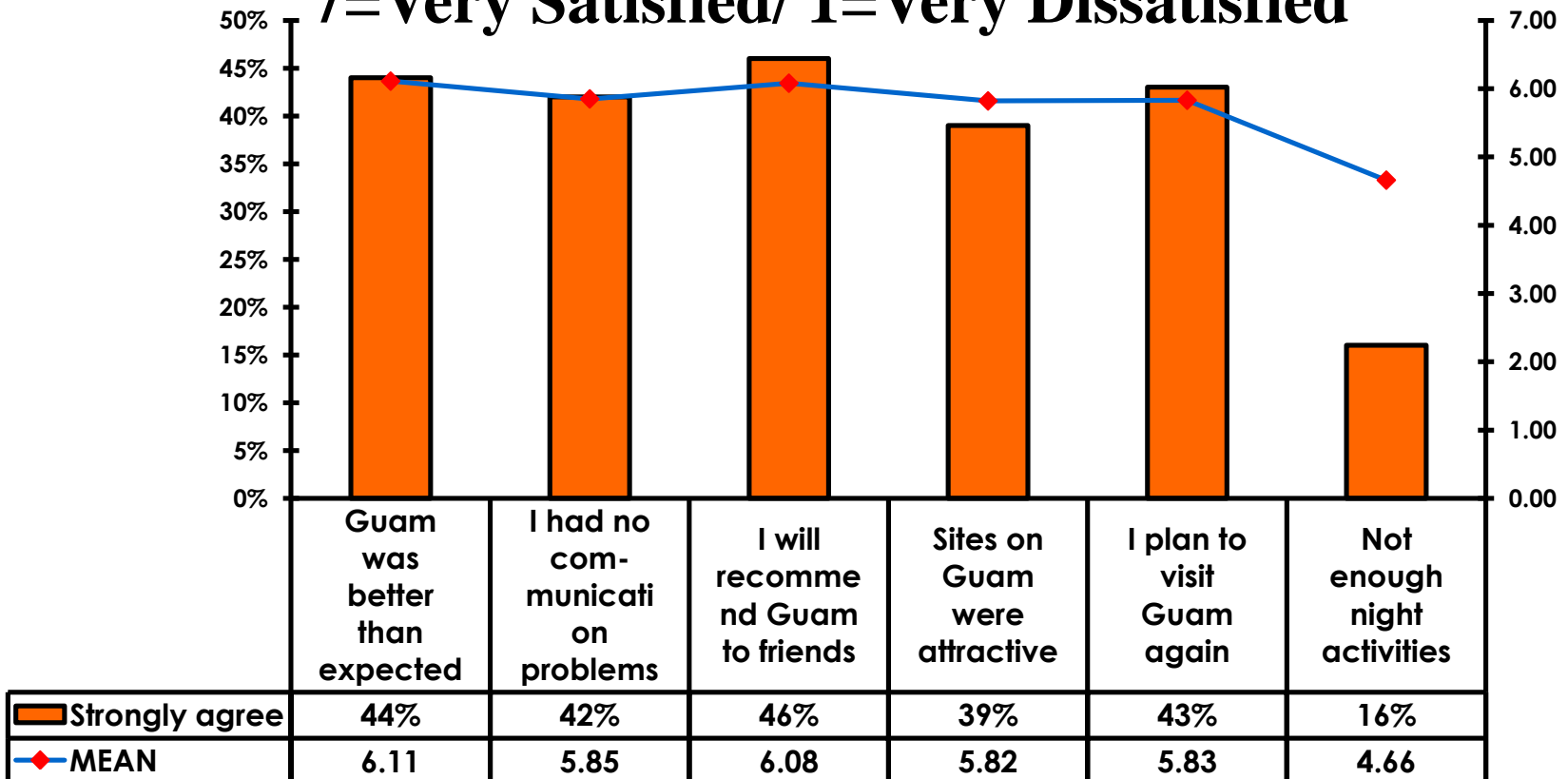
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

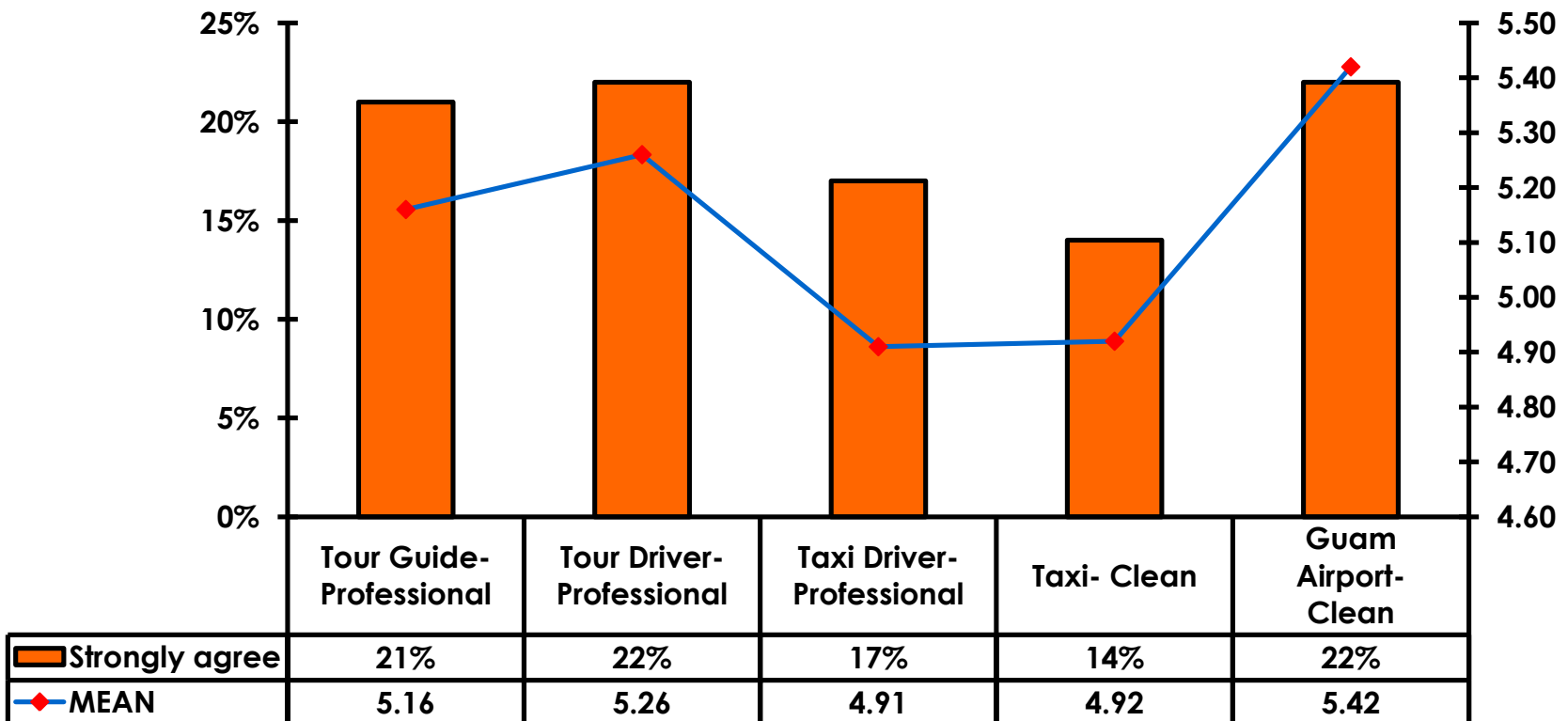
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

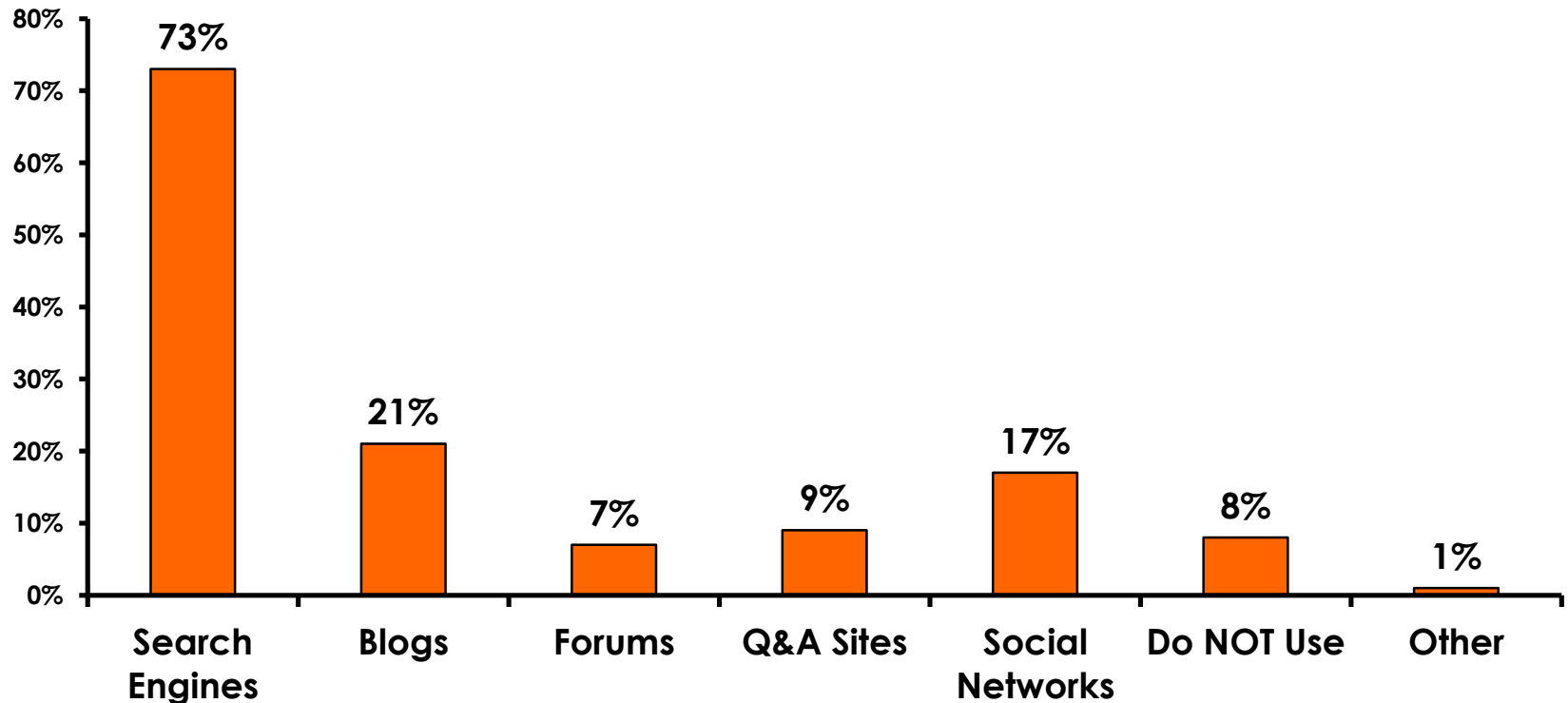
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



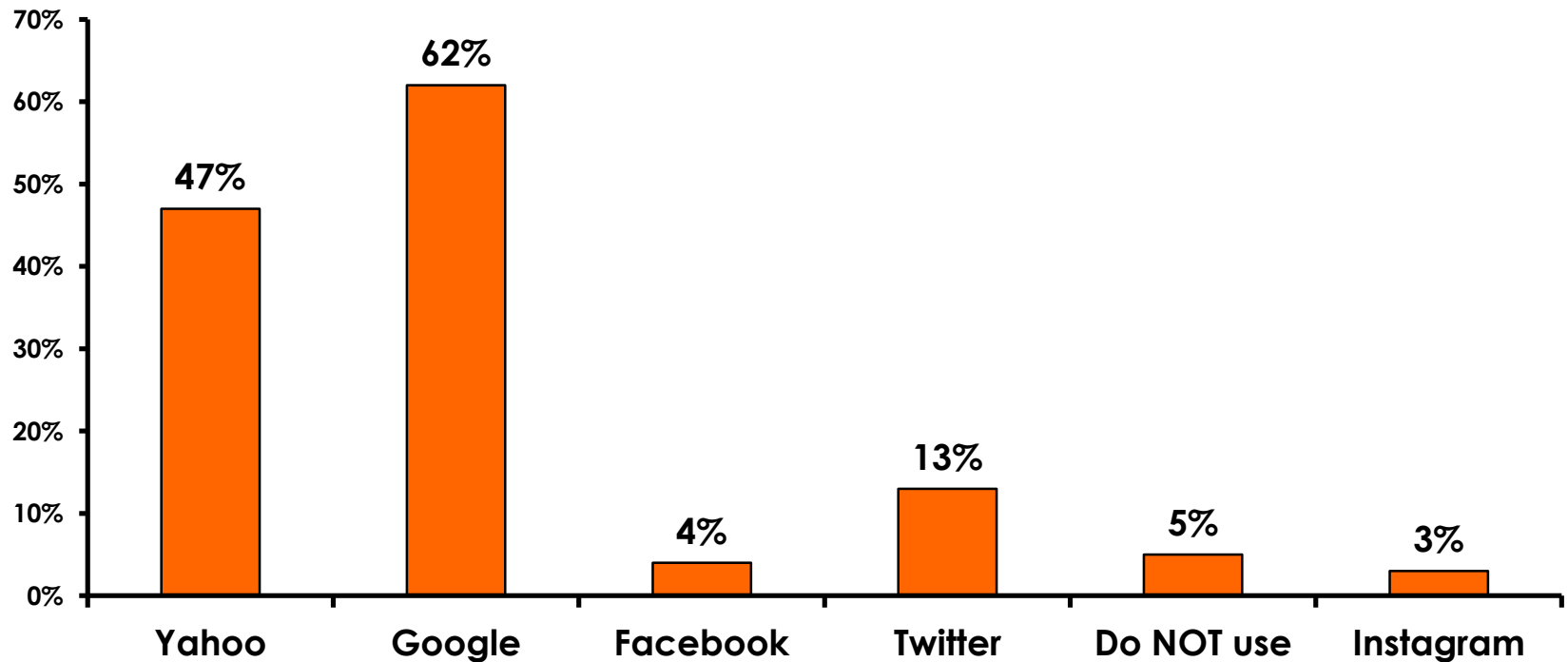
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

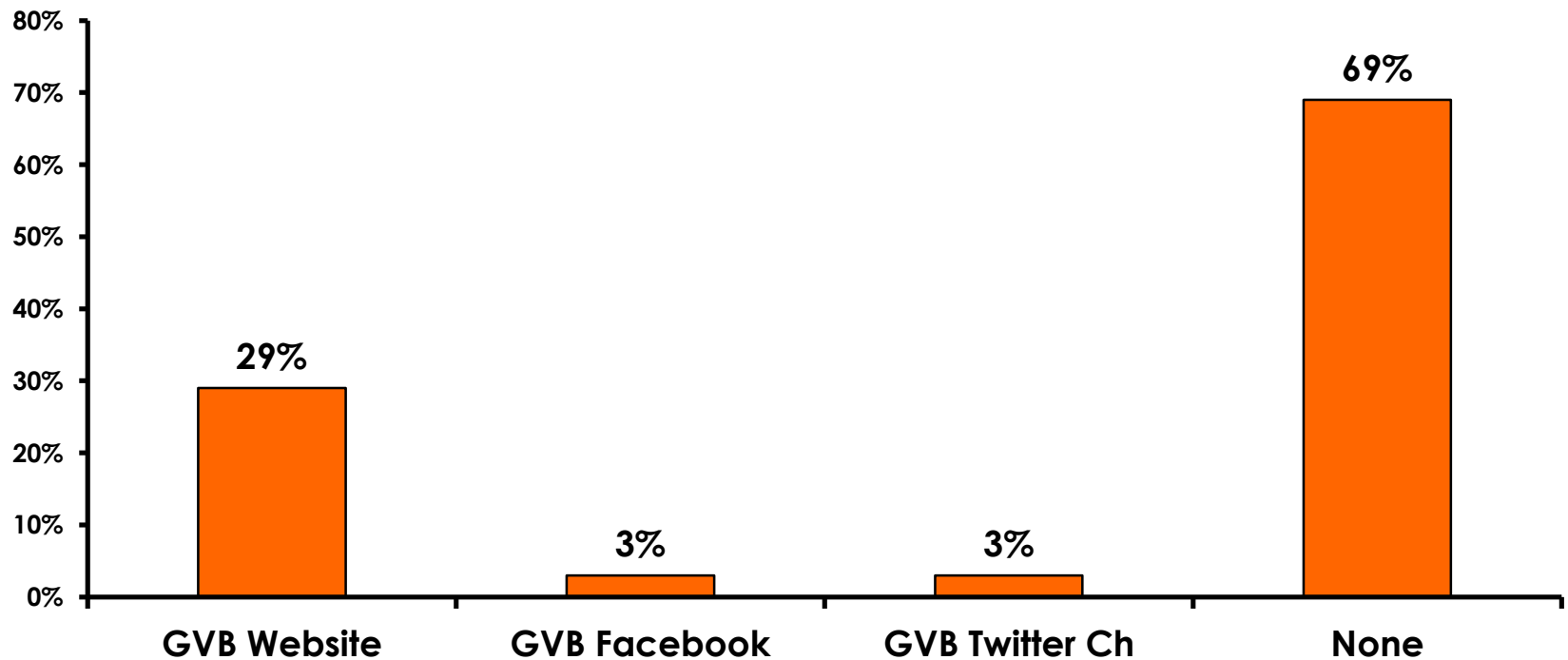


Internet- Things To Do

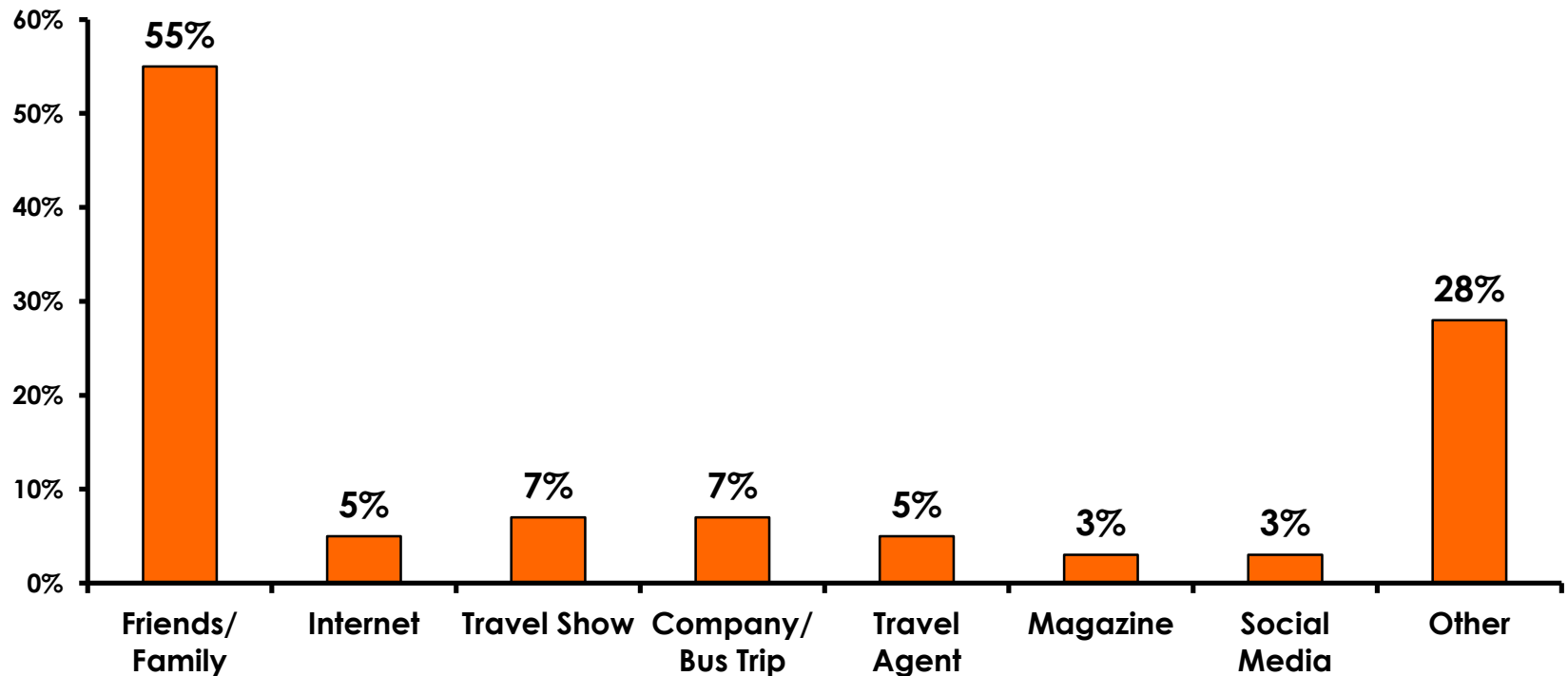
Sources of Info



Internet- GVB Sources

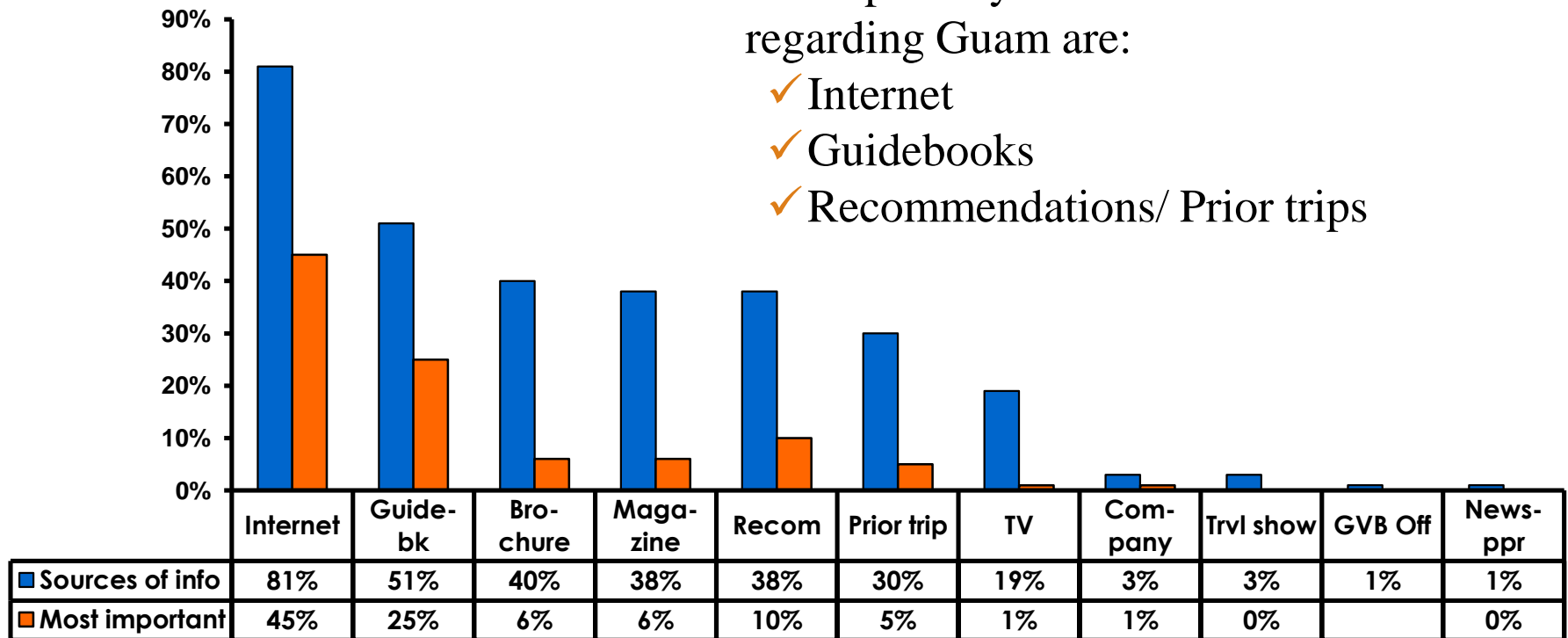


Travel Motivation- Info Sources



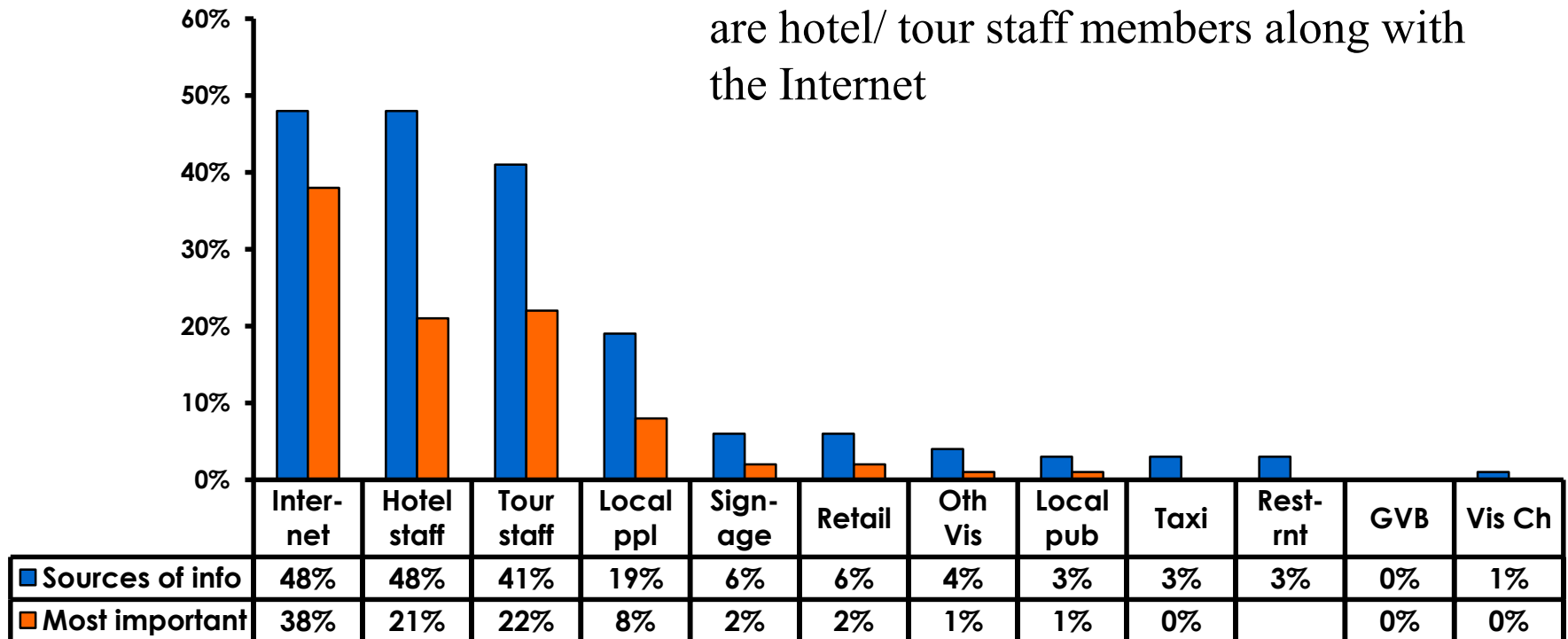
Sources of Information Pre-arrival

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

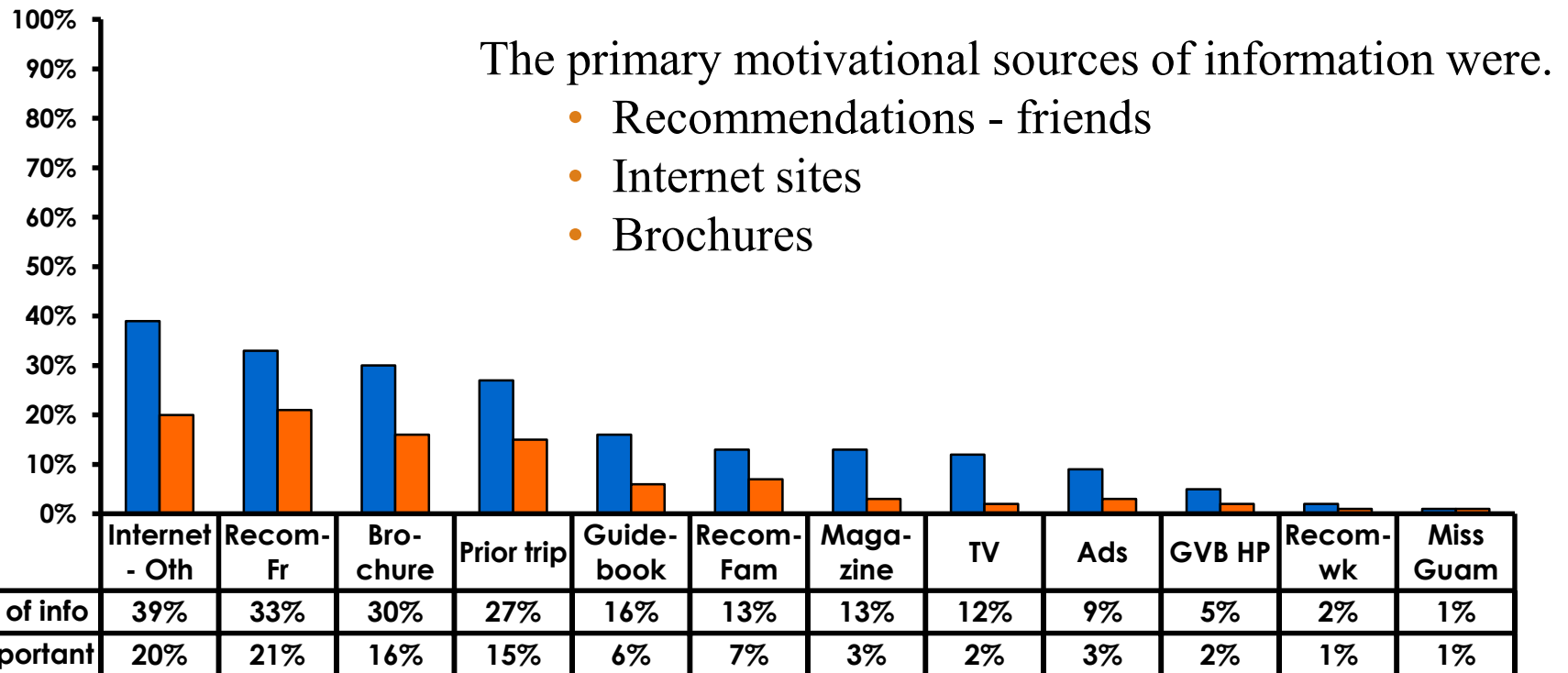


Sources of Information Post-arrival

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

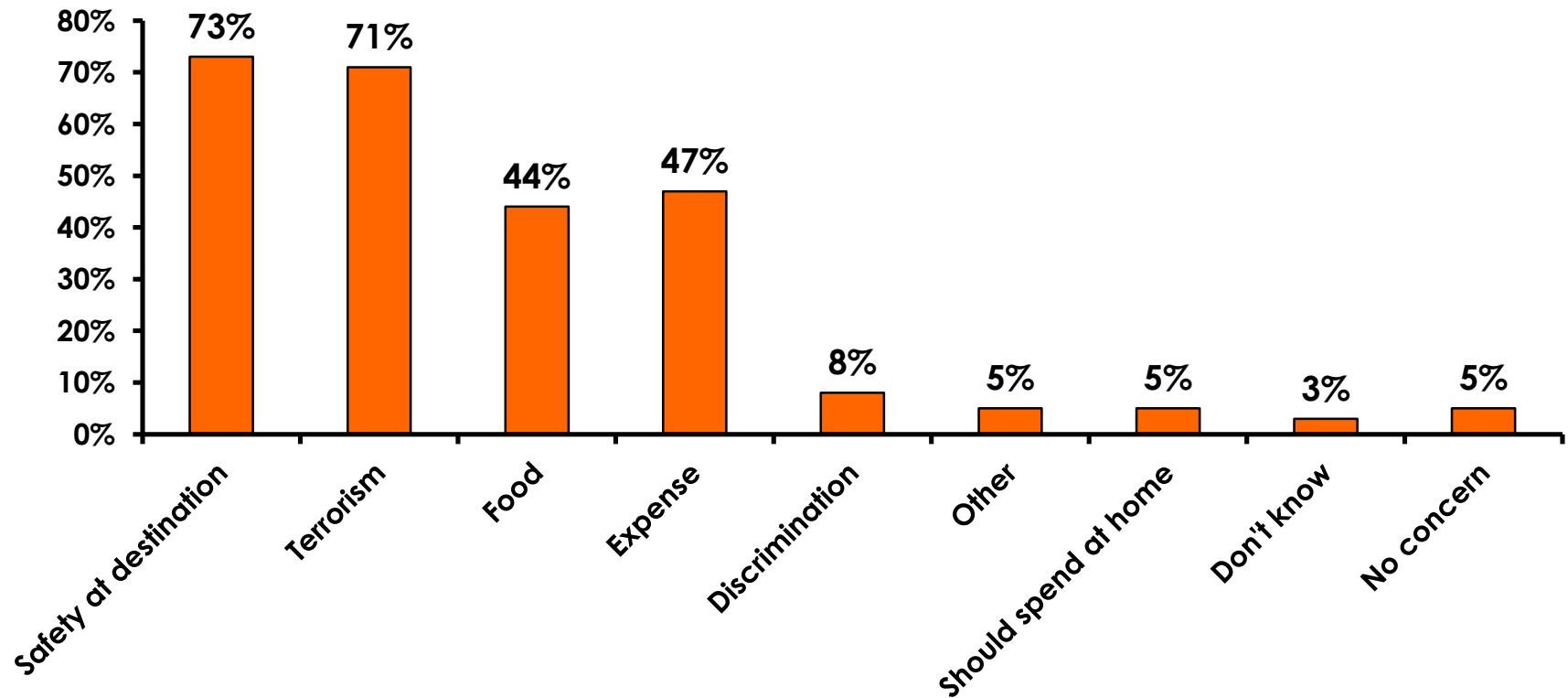


Sources of Information - Motivation



SECTION 6 **OTHER ISSUES**

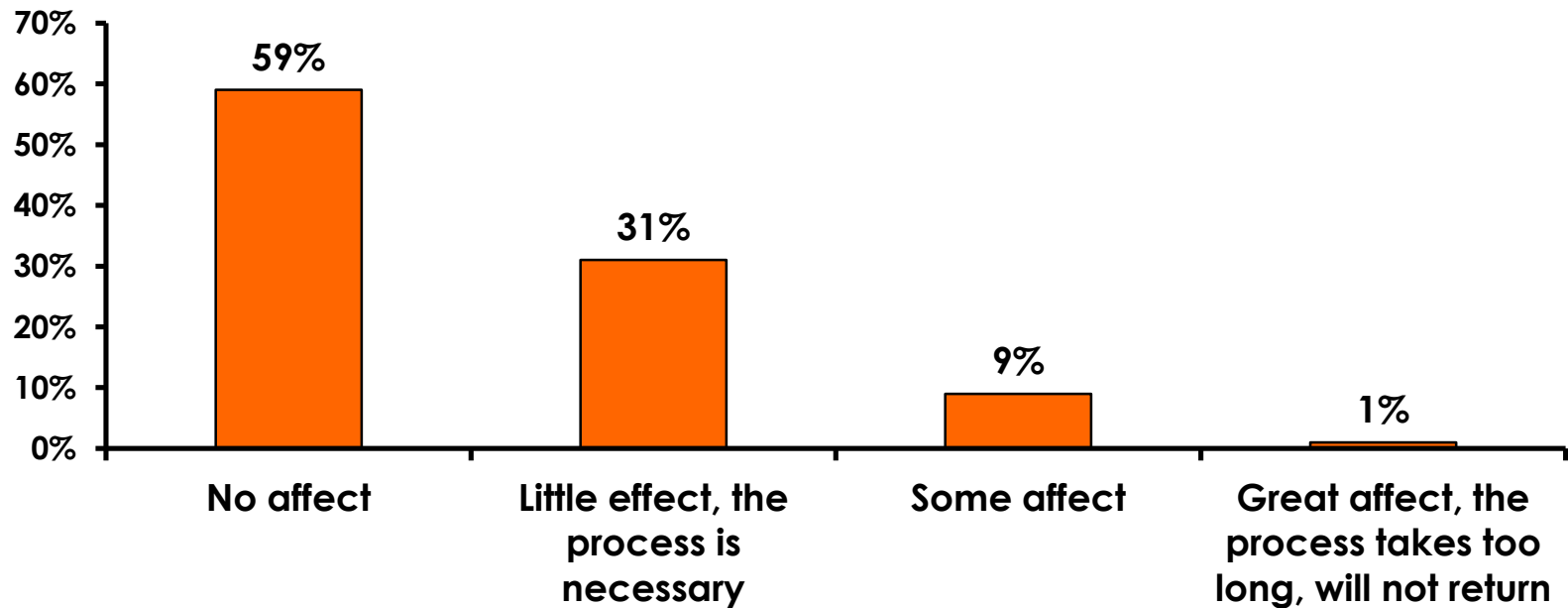
Concerns about travel outside of Japan - Overall



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	73%	71%	77%	73%	72%	55%	73%	89%	71%	79%	81%	70%	70%	
	Terrorism	71%	68%	72%	78%	76%	64%	82%	76%	80%	66%	78%	67%	60%	
	Expense	47%	45%	53%	48%	45%	36%	55%	49%	59%	53%	46%	48%	35%	
	Food	44%	43%	42%	40%	59%	27%	48%	57%	51%	34%	43%	47%	35%	
	Discrimination against Japanese	8%	8%	13%		10%	9%	12%	3%	10%	9%	11%	3%	15%	
	No concerns	5%	5%	4%	8%	3%	14%		3%	5%	4%	8%	3%	5%	
	Other	5%	6%	3%	8%			6%		5%	4%	11%	3%	10%	
	Should spend at home	5%	5%	5%	5%		9%	3%	5%	5%	4%	3%	2%	10%	
	Don't know	3%	3%	4%	3%		9%					3%	2%	10%	
	Total	Count	353	206	78	40	29	22	33	37	41	47	37	60	20

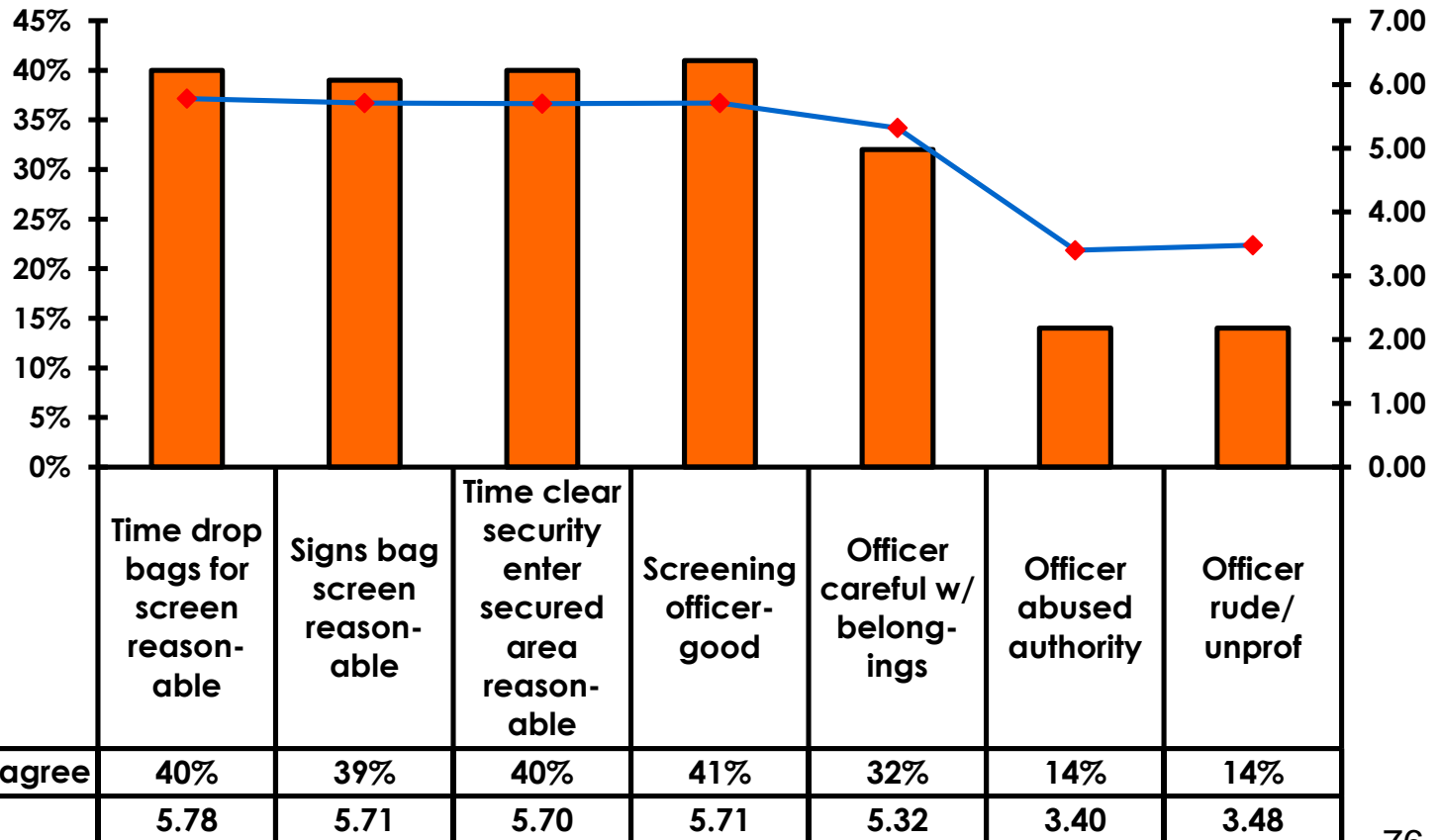
Security Screening/ Immigration Process at Guam International Airport



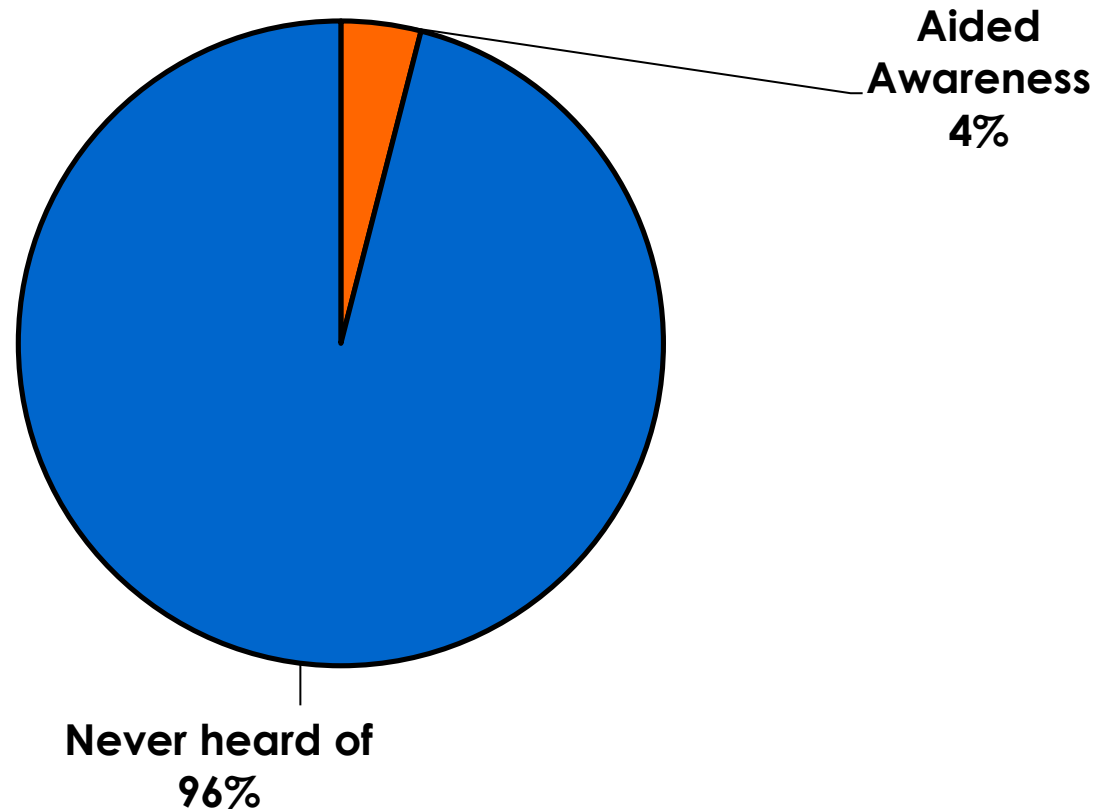
Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



Shop Guam Festival



Shop Guam Festival - Impact

n=14

