

GUAM VISITORS BUREAU Japan Visitor Tracker Exit Profile FY2016 NOVEMBER 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 **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

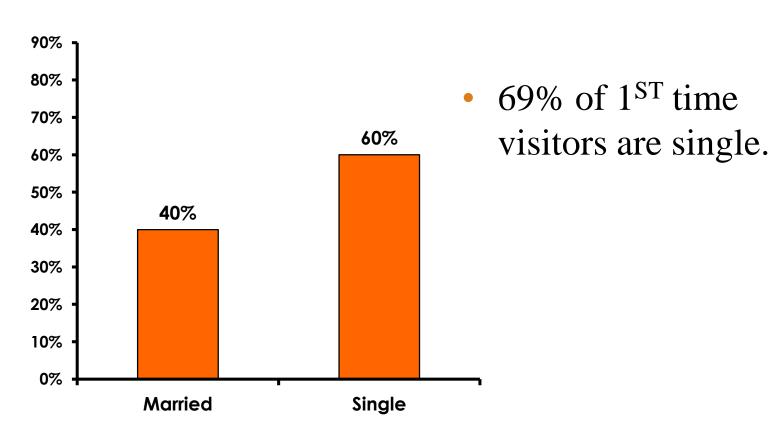
- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction,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



SECTION 1 PROFILE OF RESPONDENTS

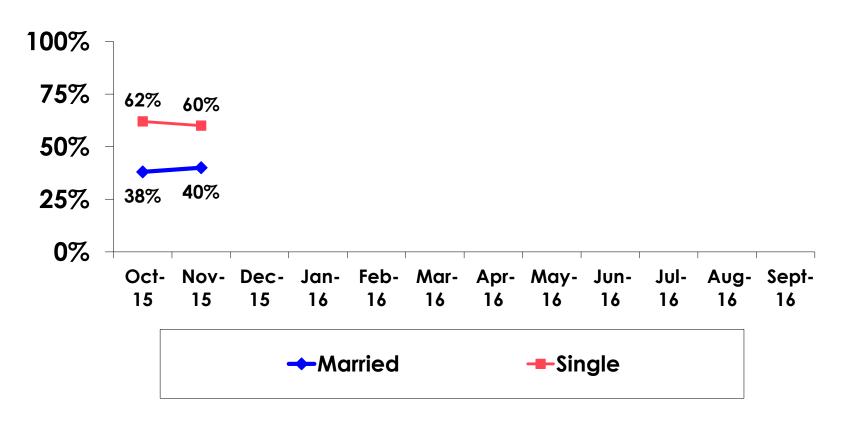


Marital Status - Overall



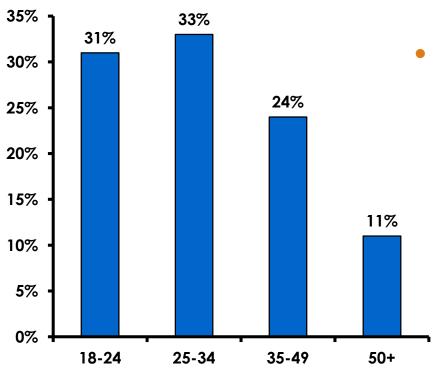


MARITAL STATUS





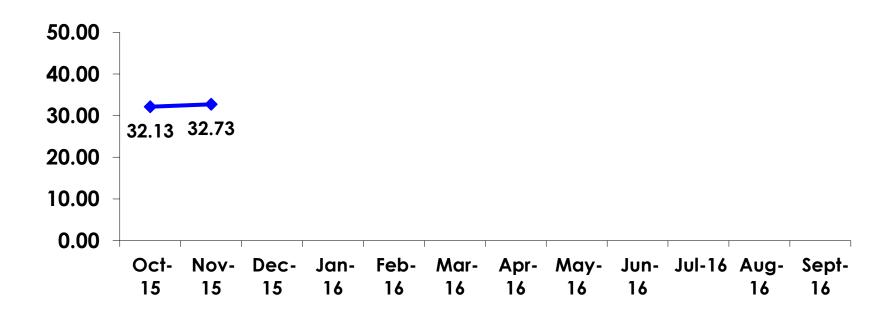
Age - Overall



• The average age of the respondents is 32.73 years of age.

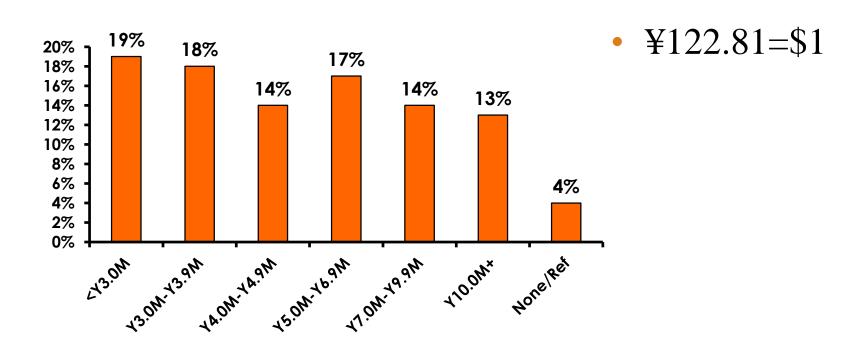


AVERAGE - AGE



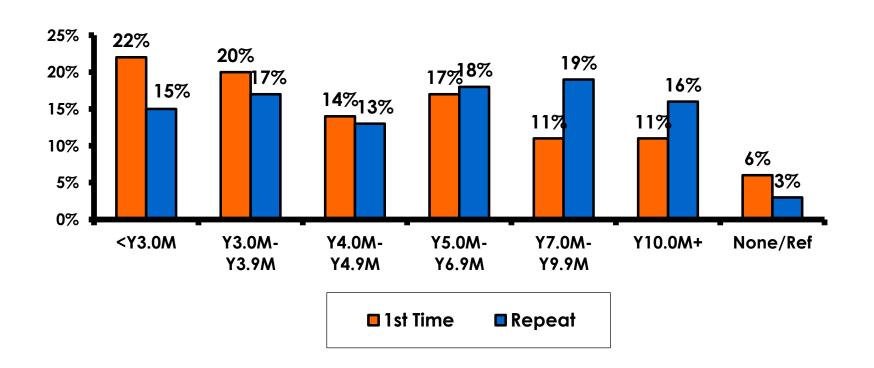


Personal Income





Personal Income – 1st time vs. repeat



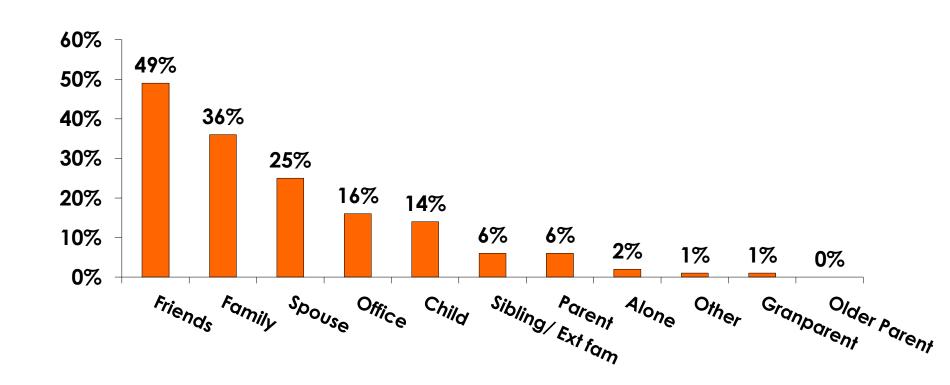


Personal Income by Gender & Age

			TOTAL	GEN	DER	AGE				
			-	Male	Female	18-24	25-34	35-49	50+	
Q26	<y2.0 million<="" td=""><td>Count</td><td>24</td><td>4</td><td>20</td><td>11</td><td>7</td><td>4</td><td>2</td></y2.0>	Count	24	4	20	11	7	4	2	
		Column N %	8%	3%	13%	13%	7%	5%	6%	
	Y2.0M-Y3.0M	Count	33	11	22	13	14	5		
		Column N %	11%	7%	14%	15%	14%	6%		
	Y3.0M-Y4.0M	Count	54	17	37	22	21	9	2	
		Column N %	18%	12%	24%	26%	21%	12%	6%	
	Y4.0M-Y5.0M	Count	41	19	22	9	21	10	1	
		Column N %	14%	13%	14%	10%	21%	13%	3%	
	Y5.0M-Y7.0M	Count	52	38	14	9	13	23	7	
		Column N %	17%	26%	9%	10%	13%	30%	19%	
	Y7.0M-Y10.0M	Count	43	30	13	9	11	17	6	
		Column N %	14%	20%	9%	10%	11%	22%	17%	
	Y10.0M+	Count	39	27	12	3	10	9	17	
		Column N %	13%	18%	8%	3%	10%	12%	47%	
	No Income	Count	13	1	12	10	2		1	
		Column N %	4%	1%	8%	12%	2%		3%	
	Total	Count	299	147	152	86	99	77	36	



Travel Companions

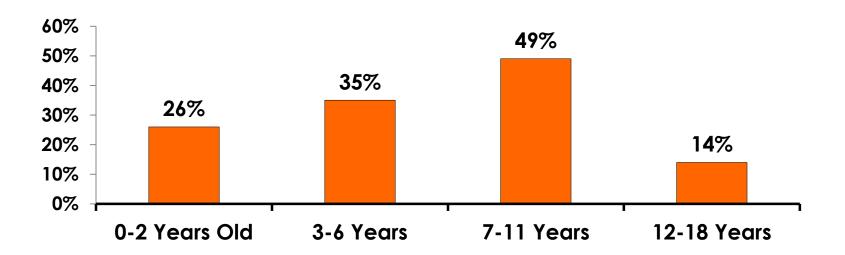




Number of Children Travel Party

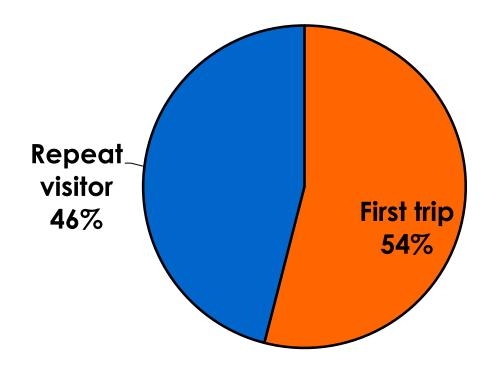
N=49 total respondents traveling with children.

(Of those N=49 respondents, there is a total of 70 children 18 years or younger)



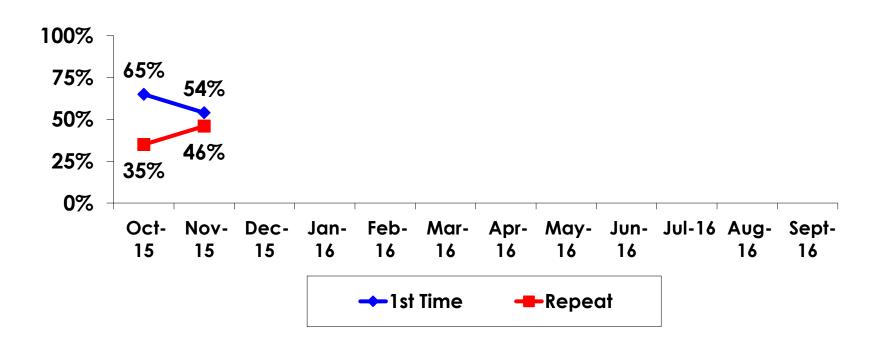


Prior Trips to Guam





PRIOR TRIPS TO GUAM





Trips to Guam by Age & Gender

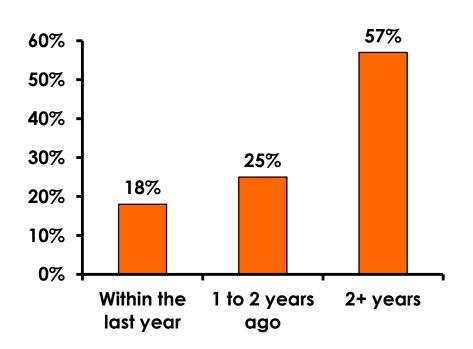
			TOTAL	TRIPS T	O GUAM
			•	1st	Repeat
GENDER	Male	Count	163	79	83
		Column N %	46%	42%	52%
	Female	Count	188	110	77
		Column N %	54%	58%	48%
	Total	Count	351	189	160
AGE	18-24	Count	109	78	30
		Column N %	31%	42%	19%
	25-34	Count	114	61	53
		Column N %	33%	33%	33%
	35-49	Count	85	35	49
		Column N %	24%	19%	31%
	50+	Count	40	13	27
		Column N %	11%	7%	17%
	Total	Count	348	187	159

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



Repeat Visitors Last Trip

n = 155

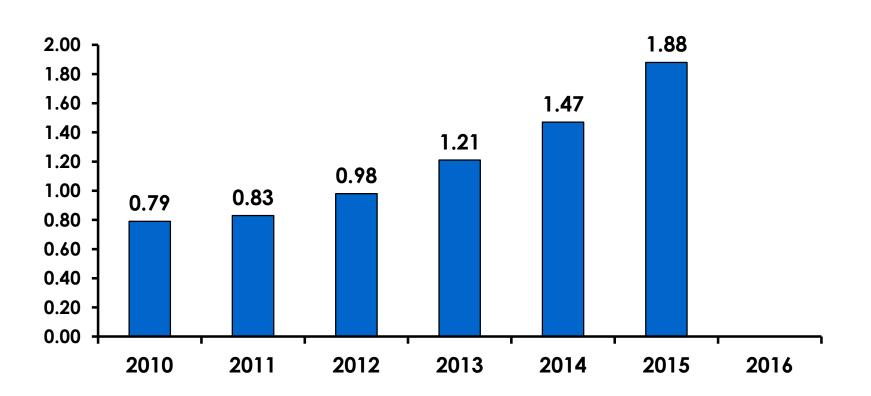


- The average repeat visitor has been to Guam 3.21 times.
- Less than half of repeat visitors have been to Guam within the last 2 years.



Average Number Overnight Trips

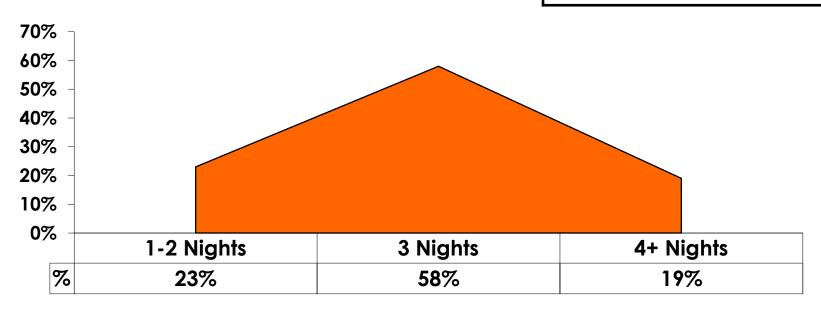
(2010-2016) (2 nights or more)





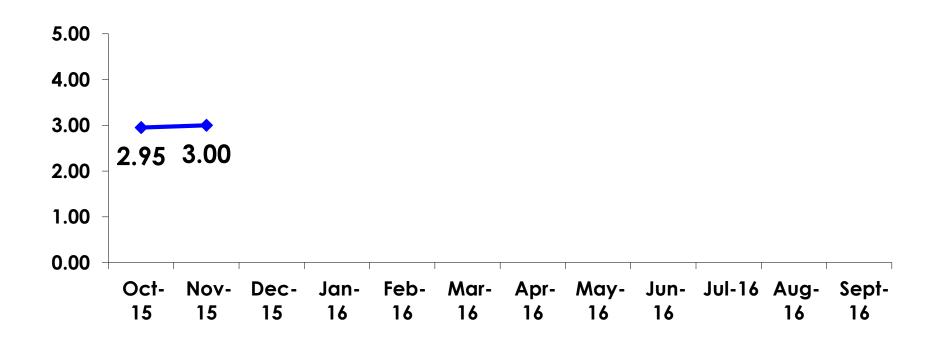
Length of Stay

Mean = 3.00 Days Median = 3.0 Days





AVG LENGTH OF STAY





Occupation by Income

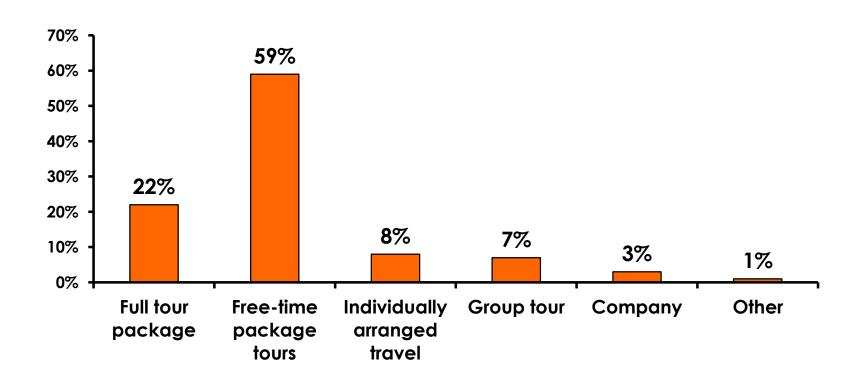
			TOTAL				Q26				
			-	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q25	Office worker non-mgr		21%	8%	42%	35%	17%	13%	16%	10%	
	Student		15%	33%		7%	7%	4%	16%	8%	77%
	Engineer		15%	8%	15%	19%	17%	19%	19%	15%	
	Salesperson		14%		15%	13%	20%	19%	16%	13%	
	Self-employed		7%		9%		5%	10%	5%	21%	8%
	Manager		6%			2%	5%	10%	9%	18%	
	Skilled worker		4%	13%	3%	7%		4%	5%		
	Other		3%	4%	6%	6%	2%	8%			
	Homemaker		3%	4%	3%	2%	10%	4%	2%	3%	
	Unemployed		2%	8%				4%	2%		15%
	Professional/ Specialist		2%			6%	2%	4%	2%	3%	
	Freeter		2%	4%	6%		2%				
	Executive (30+ employees)		1%				5%		2%	5%	
	Retired		1%	4%		2%	2%				
	Govt- office worker non- mgr		1%	4%			2%	2%			
	Free-lancer		1%	8%							
	Teacher		1%				2%		2%		
	Govt- Executive		1%			2%			2%		
	Govt- Manager		1%							5%	
	Total	Count	337	24	33	54	41	52	43	39	13



SECTION 2 TRAVEL PLANNING



Travel Planning - Overall





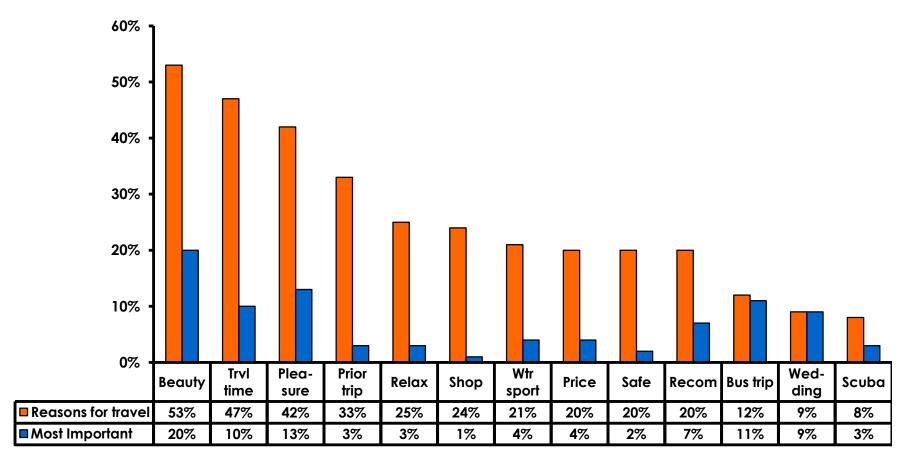
Accommodation by Income

Average length of stay: 3.00 days

			TOTAL	Q26							
			-	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	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		13%	13%	21%	6%	10%	10%	10%	18%	15%
	Fiesta Resort Guam		9%	4%	9%	20%	7%	8%		3%	15%
	Outrigger Guam Resort		8%	17%	6%	11%	2%	6%	13%	11%	
	Guam Reef & Olive Spa		6%	4%	9%	2%	17%	10%	8%		
	Holiday Resort Guam		6%	8%		7%	7%	8%	3%	5%	8%
	Royal Orchid Guam		6%		9%	4%	2%	6%	10%	8%	23%
	Hilton Guam Resort		5%		9%	6%	5%	4%	13%	5%	
	Hotel Nikko Guam		5%	8%	3%	7%	7%	4%	5%	5%	
	Westin Resort Guam		5%	4%	3%	4%	2%	10%	5%	8%	
	PIC Club		5%	4%	9%	6%	5%	6%	8%		
	Hyatt Regency Guam		4%			2%	7%	6%	5%	8%	8%
	Pacific Star Resort & Spa		4%	4%		2%	2%	2%	8%	3%	15%
	Pacific Bay Hotel		4%	17%			2%	2%	3%	8%	8%
	Grand Plaza Hotel		4%	4%	6%	4%	7%	2%	3%	5%	
	Onward Beach Resort		3%			7%	7%	6%	3%	3%	
	Lotte Hotel Guam		3%	4%	3%	9%	2%	4%			
	Leo Palace Resort		3%	8%	9%		2%	2%	3%	5%	
	Dusit Thani Guam		1%		3%					3%	
	Home stay/ friend/ relative		1%			2%		2%		3%	
	Sheraton Laguna Guam		1%					4%	3%		
	Hotel Santa Fe		1%						3%		
	Aqua Suites		1%			2%					
	Other		1%				2%				8%
	Condo		0%								
	Total	Count	345	24	33	54	41	51	40	38	13



Travel Motivation - Top Responses





Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure,
- Business trip
 were the primary reasons for visiting during
 this period.



Motivation by Age & Gender

			TOTAL		AG	Ε		GENDER		
			-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty		53%	74%	43%	49%	30%	47%	57%	
	Short travel time		47%	55%	42%	48%	35%	43%	50%	
	Pleasure		42%	56%	36%	38%	30%	34%	48%	
	Previous trip		33%	19%	33%	48%	40%	36%	30%	
	Relax		25%	27%	30%	21%	15%	22%	28%	
	Shopping		24%	34%	20%	19%	18%	16%	30%	
	Water sports		21%	32%	14%	21%	15%	20%	23%	
	Price		20%	28%	17%	18%	15%	18%	22%	
	Safe		20%	23%	18%	19%	20%	21%	19%	
	Recomm- friend/family/trvl agnt		20%	29%	23%	15%		14%	25%	
	Company/ Business Trip		12%	10%	15%	7%	15%	9%	14%	
	Married/ Attn wedding		9%	2%	16%	8%	15%	12%	7%	
	Scuba		8%	7%	10%	7%	10%	9%	8%	
	Other		5%	4%	3%	4%	18%	7%	3%	
	Golf		4%	1%	1%	4%	20%	7%	1%	
	Visit friends/ Relatives		3%	4%	3%	2%	8%	2%	5%	
	Honeymoon		3%		6%	5%		6%	1%	
	Company Sponsored		2%		2%	2%	3%	2%	1%	
	Organized sports		1%	1%	2%	1%	3%	1%	2%	
	Total	Count	350	108	114	85	40	163	187	



Motivation by Income

			TOTAL		Q26						
			- TOTAL	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
054	Nieko-liko-ok										
Q5A	Natural beauty		53%	71%	52%	43%	49%	63%	51%	36%	75%
	Short travel time		47%	58%	58%	44%	27%	50%	44%	59%	58%
	Pleasure		42%	50%	58%	31%	20%	52%	44%	49%	58%
	Previous trip		33%	29%	27%	30%	32%	38%	51%	41%	17%
	Relax		25%	25%	36%	35%	7%	29%	30%	21%	25%
	Shopping		24%	25%	27%	24%	17%	23%	26%	26%	25%
	Water sports		21%	29%	24%	17%	12%	19%	33%	26%	42%
	Price		20%	29%	9%	17%	20%	19%	21%	26%	17%
	Safe		20%	13%	18%	22%	12%	21%	19%	28%	25%
	Recomm- friend/family/trvl agnt		20%	13%	21%	22%	17%	19%	14%	18%	25%
	Company/ Business Trip		12%	8%	6%	20%	17%	6%	12%	8%	
	Married/ Attn wedding		9%	4%	12%	17%	12%	10%	12%	5%	
	Scuba		8%		12%	6%	2%	12%	7%	10%	25%
	Other		5%		3%	4%	10%	6%		8%	8%
	Golf		4%		3%		5%	4%	2%	13%	
	Visit friends/ Relatives		3%	13%	3%	4%		4%	2%	8%	
	Honeymoon		3%				7%	4%	5%	5%	
	Company Sponsored		2%			4%		2%		3%	
	Organized sports		1%	4%		2%		4%	2%		
	Total	Count	350	24	33	54	41	52	43	39	12



SECTION 3 EXPENDITURES



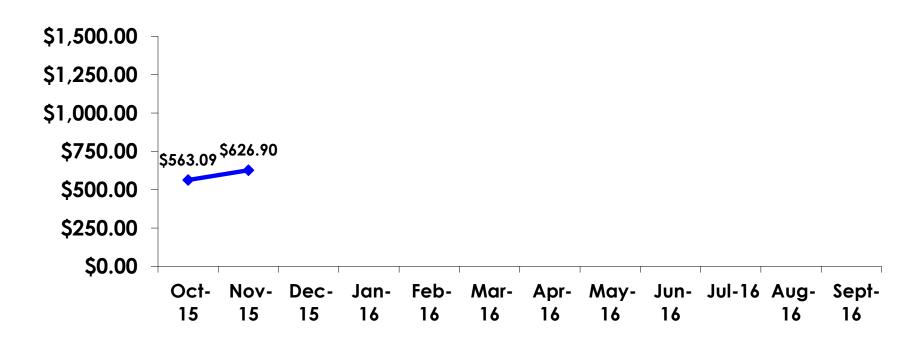
Prepaid Expenditures

¥122.81/US\$1

- \$1,250.27 = overall mean average prepaid expense (for entire travel party size) by respondent
- $\$0 = \min \text{minimum}$ (lowest amount recorded for the entire sample)
- \$21,985 = maximum (highest amount recorded for the entire sample)
- \$626.90 = overall mean average <u>per person</u> prepaid expenditures



PREPAID EXPENDITURES Per Person



YTD=\$595.00



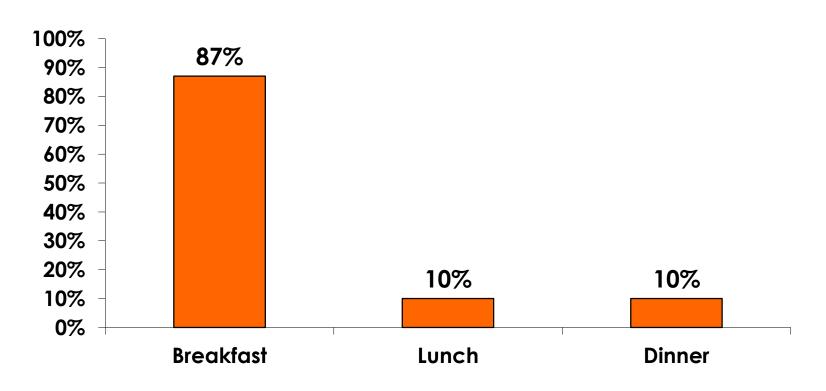
(Filter: Only those who responded/ Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,165.44
Air & Accommodation w/ daily meal package	\$2,322.94
Air only	\$1,289.85
Accommodation only	\$525.68
Accommodation w/ daily meal only	\$1,872.81
Food & Beverages in Hotel	\$57.00
Ground transportation – Japan	\$168.22
Ground transportation – Guam	\$41.53
Optional tours/ activities	\$194.28
Other expenses	\$811.23
Total Prepaid	\$1,250.27



PREPAID MEAL BREAKDOWN

Air/Accommodations with Daily Meal Pkg. n=31

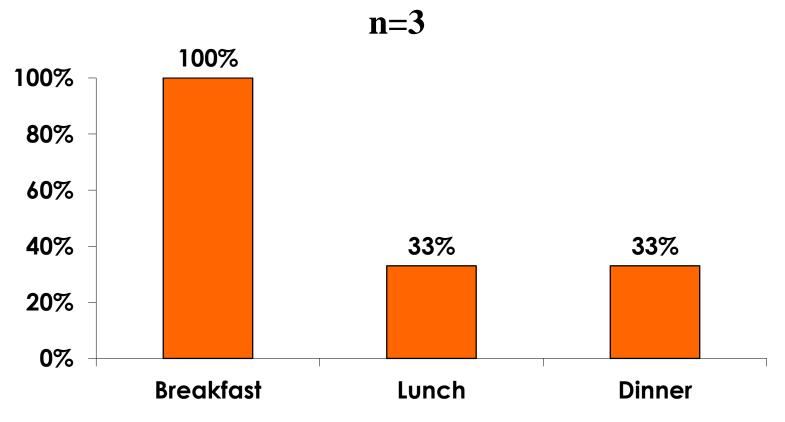


Mean=\$2,322.94 per travel party



PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

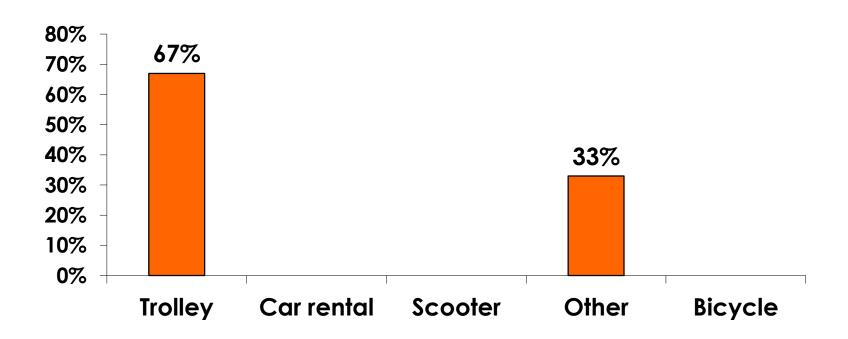


Mean=\$1,872.81 per travel party



PREPAID GROUND TRANSPORTATION

n=3



Mean=\$41.53 per travel party

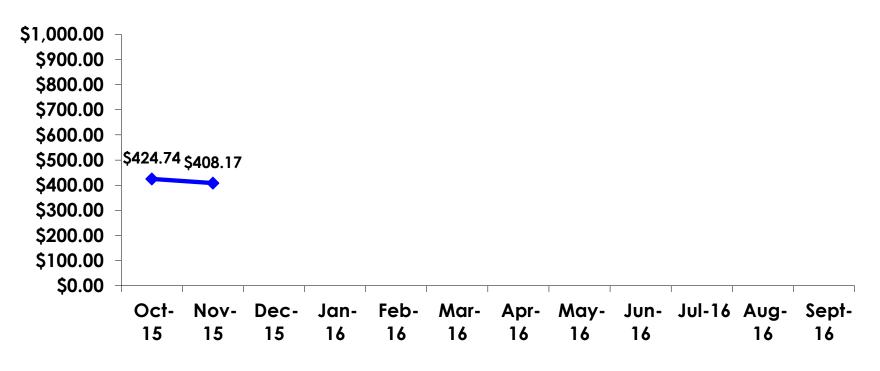


On-Island Expenditures

- \$630.49 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,450 = Maximum (highest amount recorded for the entire sample)
- \$408.17 = overall mean average <u>per person</u> onisland expenditure



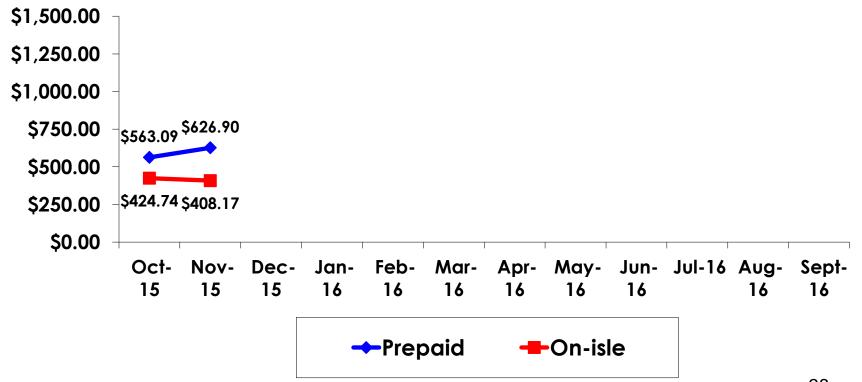
ON-ISLAND EXPENDITURES Per Person





PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$595.00 On-Isle YTD = \$416.46





Total On-Island Expenditure by Gender & Age

TOTAL GE				DER	GENDER								
					Male					Female			
						AGE			AGE				
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+	
PER PERSON	Mean	\$408.17	\$417.44	\$400.14	\$421.31	\$372.37	\$374.72	\$547.35	\$411.48	\$411.97	\$383.80	\$269.08	
	Median	\$333	\$340	\$329	\$350	\$300	\$310	\$403	\$343	\$383	\$300	\$74	
	Minimum	\$0	\$0	\$0	\$125	\$0	\$0	\$100	\$0	\$0	\$0	\$0	
	Maximum	\$2,500	\$2,500	\$2,000	\$1,800	\$1,150	\$2,000	\$2,500	\$2,000	\$2,000	\$1,224	\$1,045	



On-Island Expenditure Categories by Gender & Age

		TOTAL	TOTAL GENDER			AGE					
			Male	Female	18-24	25-34	35-49	50+			
F&B HOTEL	Mean	\$29.80	\$41.88	\$19.33	\$17.56	\$9.75	\$51.59	\$73.75			
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
F&B FF/STORE	Mean	\$27.13	\$37.60	\$18.06	\$17.20	\$28.77	\$41.59	\$20.83			
	Median	\$0	\$4	\$0	\$0	\$0	\$5	\$0			
F&B RESTRNT	Mean	\$78.97	\$113.09	\$49.40	\$38.43	\$68.43	\$121.06	\$118.50			
	Median	\$0	\$40	\$0	\$0	\$0	\$50	\$50			
OPT TOUR	Mean	\$49.21	\$60.52	\$39.41	\$42.58	\$33.99	\$73.68	\$62.38			
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
GIFT- SELF	Mean	\$160.26	\$208.99	\$118.01	\$100.41	\$220.57	\$147.41	\$168.25			
	Median	\$10	\$20	\$1	\$0	\$0	\$50	\$30			
GIFT- OTHER	Mean	\$82.79	\$110.20	\$59.02	\$47.26	\$73.00	\$105.94	\$162.00			
	Median	\$25	\$50	\$0	\$15	\$0	\$50	\$100			
TRANS	Mean	\$14.15	\$20.96	\$8.24	\$9.85	\$14.76	\$15.07	\$20.68			
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
OTHER	Mean	\$188.18	\$215.02	\$164.90	\$151.28	\$197.42	\$178.89	\$288.70			
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
TOTAL	Mean	\$630.49	\$808.25	\$476.37	\$424.58	\$646.70	\$735.24	\$915.07			
	Median	\$490	\$550	\$373	\$350	\$400	\$560	\$700			



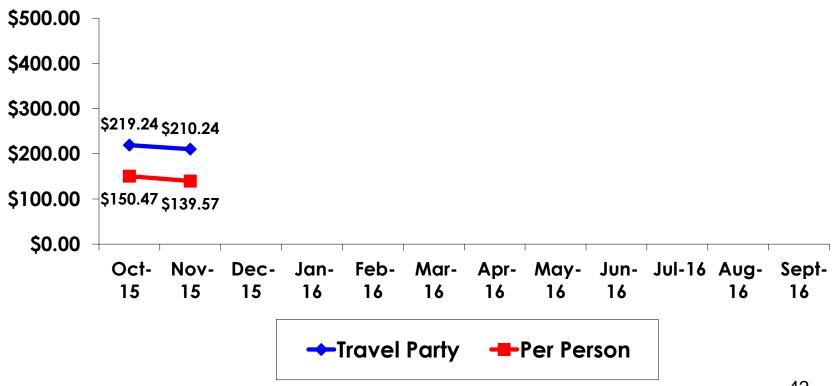
On-Island Expenditures First Timers & Repeaters

		TOTAL	TRIPS T	O GUAM	
		-	1st	Repeat	
F&B HOTEL	Mean	\$29.80	\$23.84	\$37.22	
	Median	\$0	\$0	\$0	
F&B FF/STORE	Mean	\$27.13	\$17.36	\$32.14	
	Median	\$0	\$0	\$3	
F&B RESTRNT	Mean	\$78.97	\$77.19	\$82.08	
	Median	\$0	\$ 5	\$12	
OPT TOUR	Mean	\$49.21	\$46.88	\$52.58	
	Median	\$0	\$0	\$0	
GIFT- SELF	Mean	\$160.26	\$179.26	\$139.19	
	Median	\$10	\$10	\$10	
GIFT- OTHER	Mean	\$82.79	\$64.72	\$104.47	
	Median	\$25	\$ 5	\$50	
TRANS	Mean	\$14.15	\$9.88	\$19.21	
	Median	\$0	\$0	\$0	
OTHER	Mean	\$188.18	\$189.07	\$183.23	
	Median	\$0	\$0	\$0	
TOTAL	Mean	\$630.49	\$608.20	\$650.10	
	Median	\$490	\$400	\$500	



ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$214.74 Per Person YTD = \$145.02



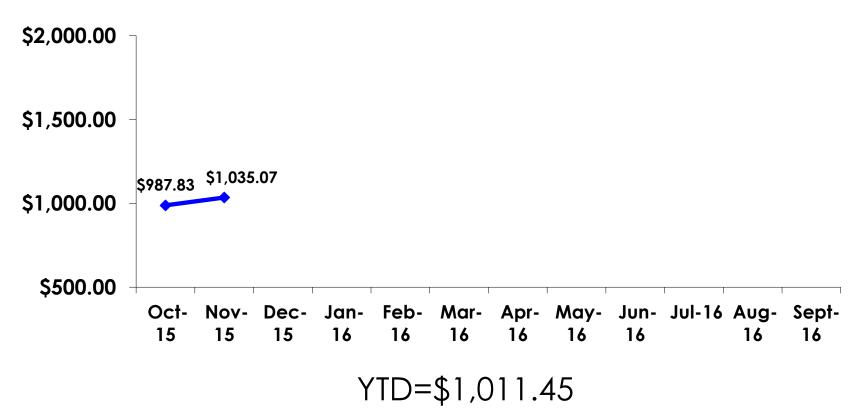


Total Expenditures Per Person (Prepaid & On-Island)

- \$1,035.07 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,129 = Maximum (highest amount recorded for the entire sample)



TOTAL EXPENDITURES Per Person



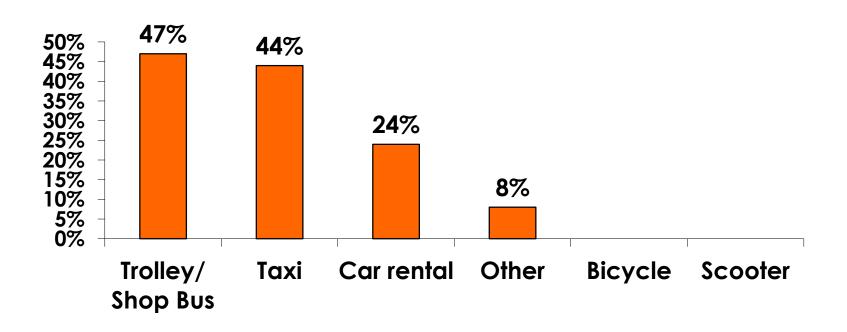


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$29.80
Food & beverage in fast food restaurant/convenience store	\$27.13
Food & beverage at restaurants or drinking establishments outside a hotel	\$78.97
Optional tours and activities	\$49.21
Gifts/ souvenirs for yourself/companions	\$160.26
Gifts/ souvenirs for friends/family at home	\$82.79
Local transportation	\$14.15
Other expenses not covered	\$188.18
Average Total	\$630.49



Local Transportation_{n=75}



Mean=\$14.15 per travel party



Guam Airport Expenditures

- \$25.50 = Mean
- \$6 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$535 = Maximum (highest amount recorded for the entire sample)



Breakdown of Airport Expenditures

	MEAN \$
Food & Beverages	\$7.60
Gifts/Souvenirs Self	\$11.05
Gifts/Souvenirs Others	\$6.85
Total	\$25.50



SECTION 4 VISITOR SATISFACTION

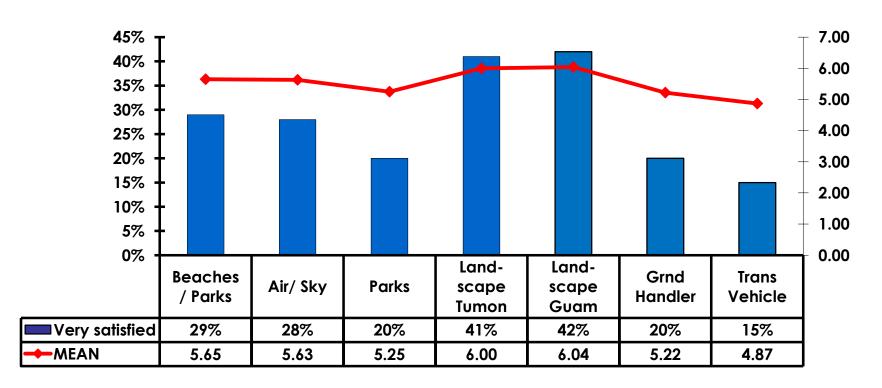


Satisfaction Scores Overall



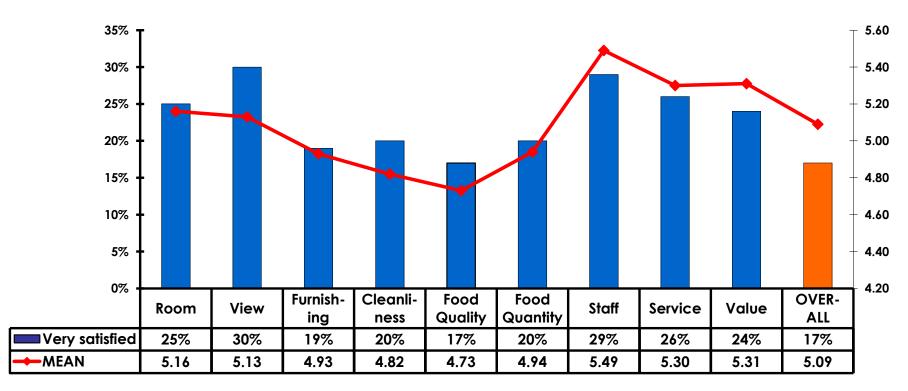


Satisfaction Quality/ Cleanliness



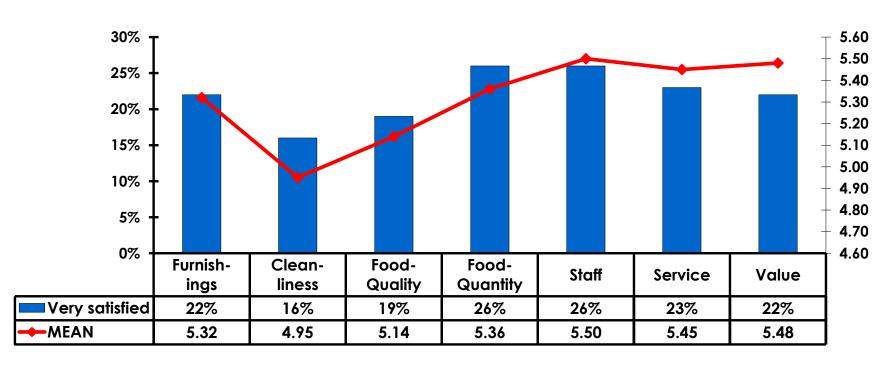


Quality of Accommodations



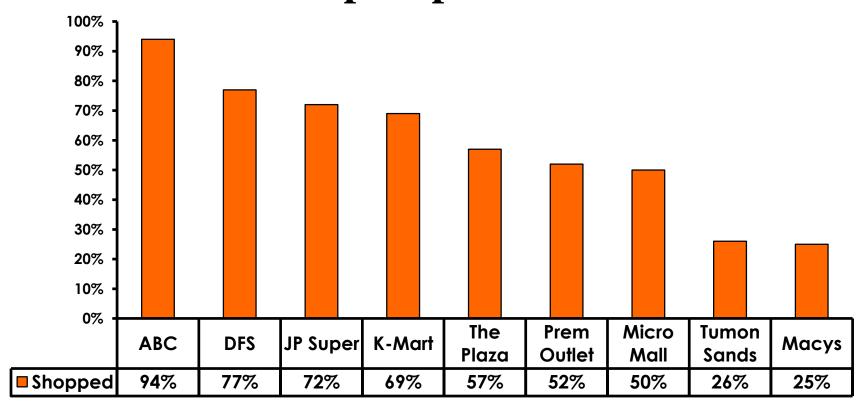


Quality of Dining Experience





Visits to Shopping Centers/Malls on Guam Top responses



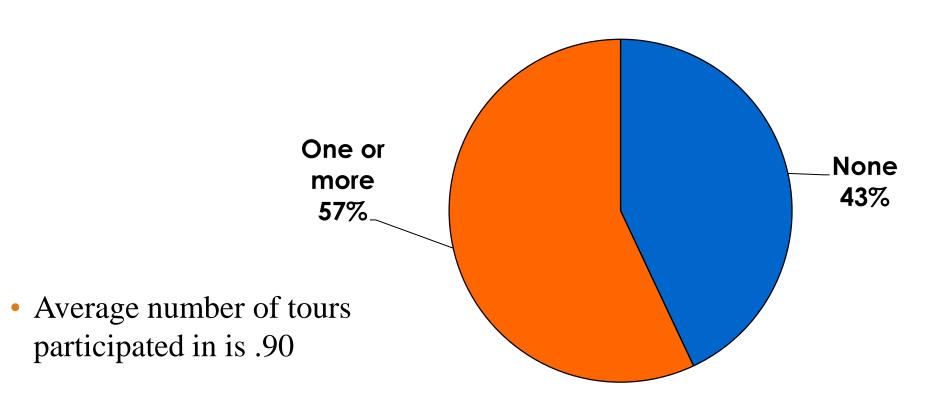


Satisfaction with Shopping

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 53%	Score of 6 to 7 = 55%
Score of 4 to 5 = 42 %	Score of 4 to 5 = 40 %
Score 1 to 3 = 5 %	Score 1 to 3 = 5 %
MEAN = 5.40	MEAN = 5.42

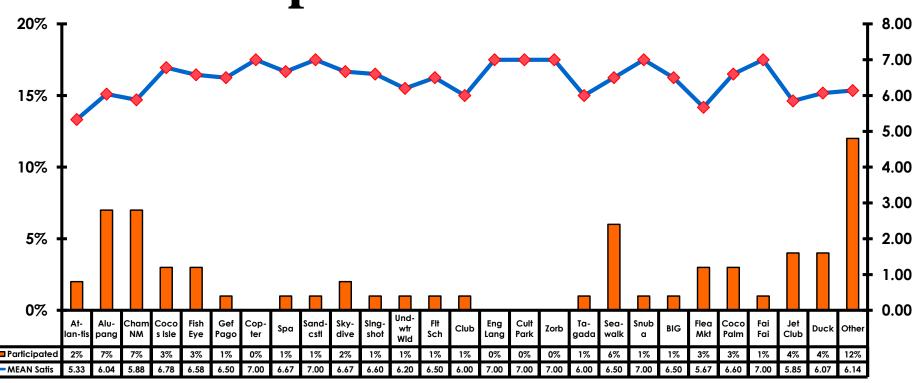


Optional Tour Participation





Optional Tours Participation & Satisfaction





Day Tours Satisfaction

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 61%	Score of 6 to 7 = 58%
Score of 4 to 5 = 37%	Score of 4 to 5 = 40 %
Score 1 to 3 = 2 %	Score 1 to 3 = 3 %
MEAN = 5.58	MEAN = 5.51

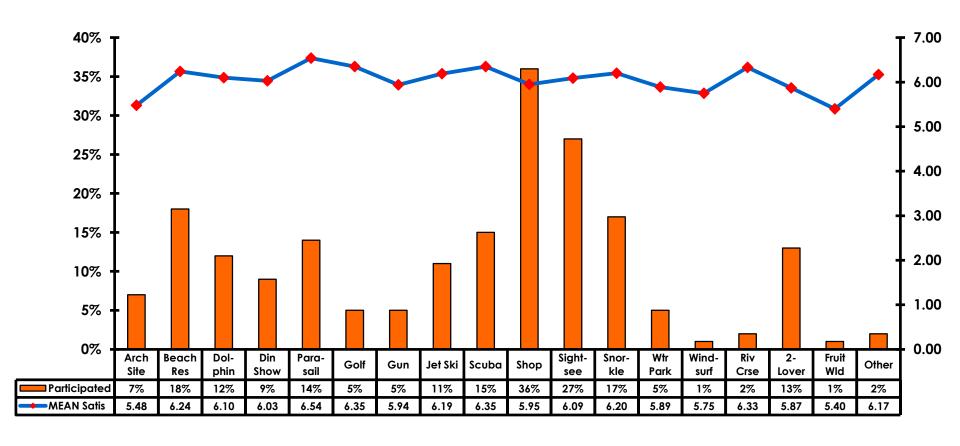


Night Tours Satisfaction

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 30%	Score of 6 to 7 = 29%
Score of 4 to 5 = 67%	Score of 4 to 5 = 67%
Score 1 to 3 = 4 %	Score 1 to 3 = 3 %
MEAN = 4.76	MEAN = 4.76

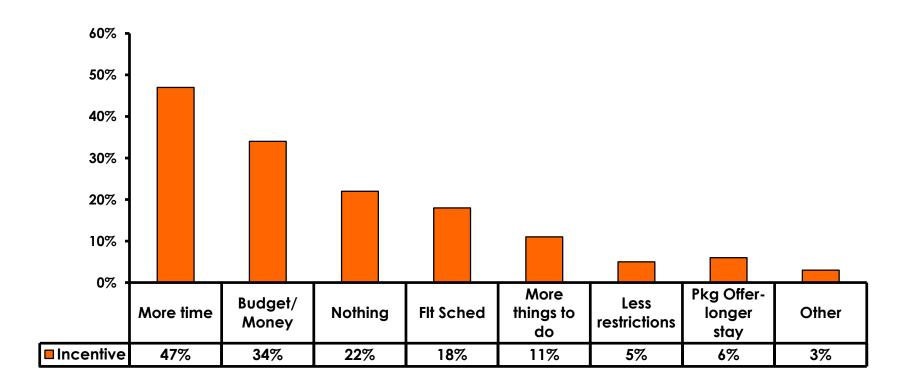


Satisfaction with Other Activities





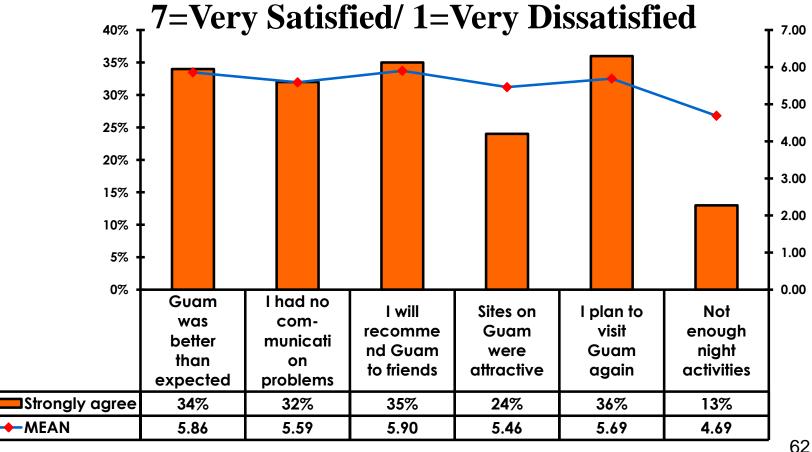
What would it take to make you want to stay an extra day in Guam?





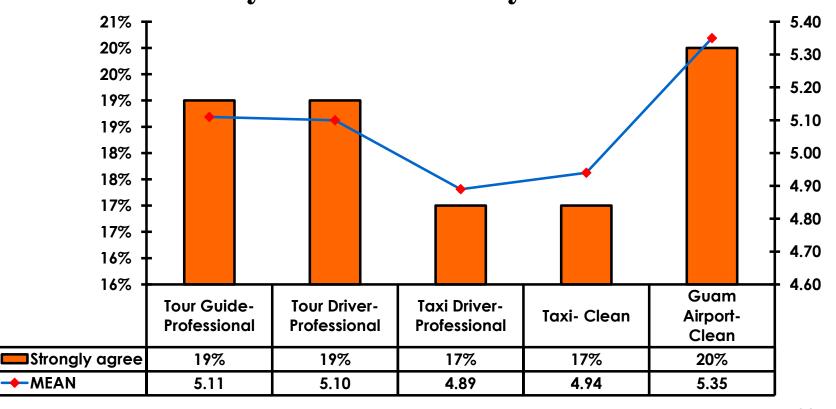
On-Island Perceptions







On-Island Perceptions

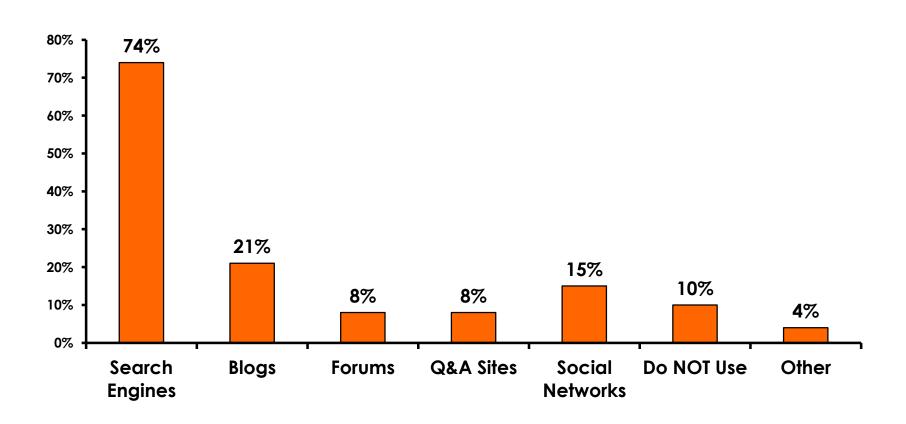




SECTION 5 PROMOTIONS

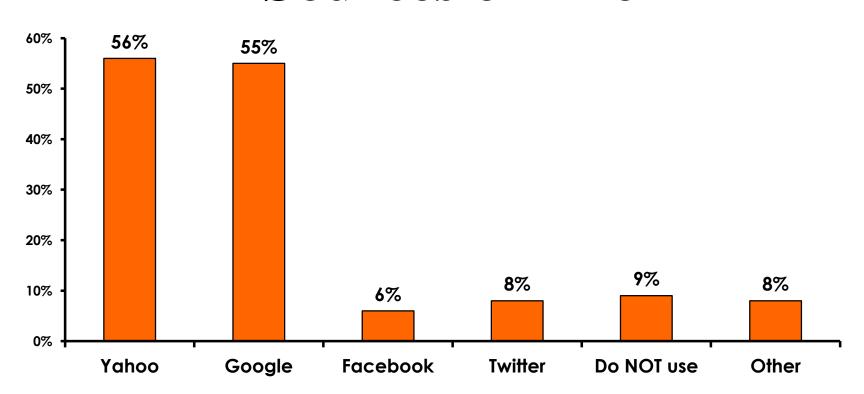


Internet- Guam Sources of Info



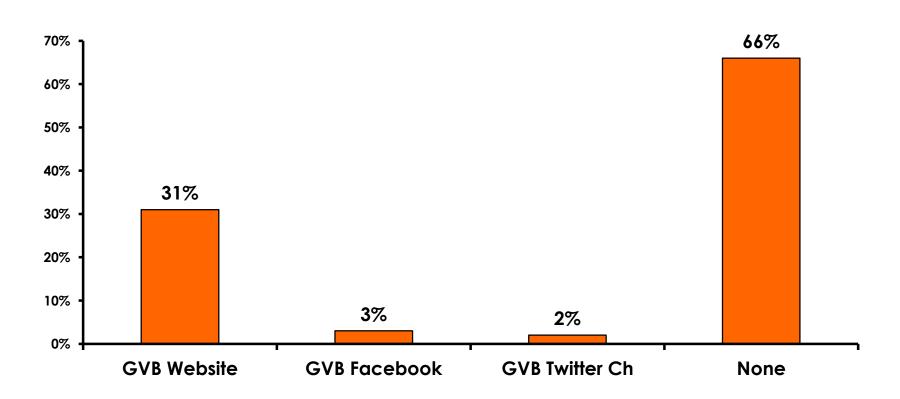


Internet- Things To Do Sources of Info



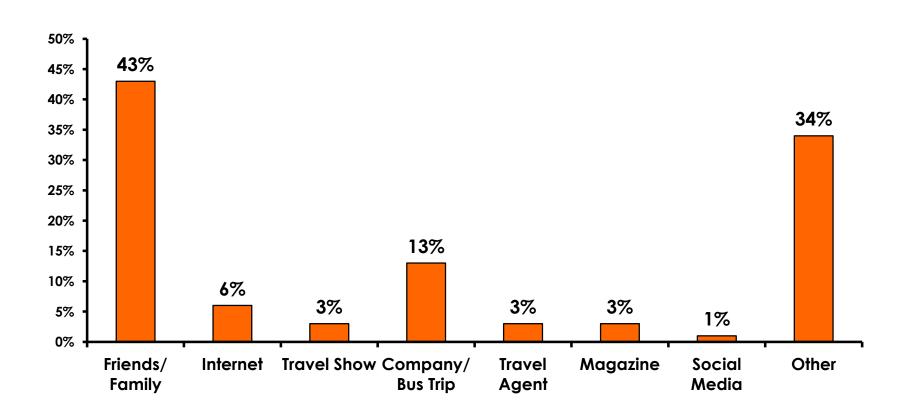


Internet- GVB Sources



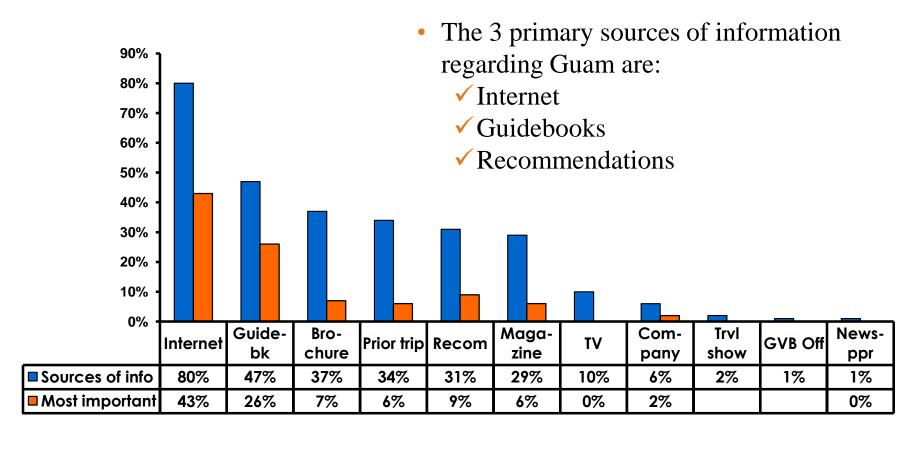


Travel Motivation-Info Sources



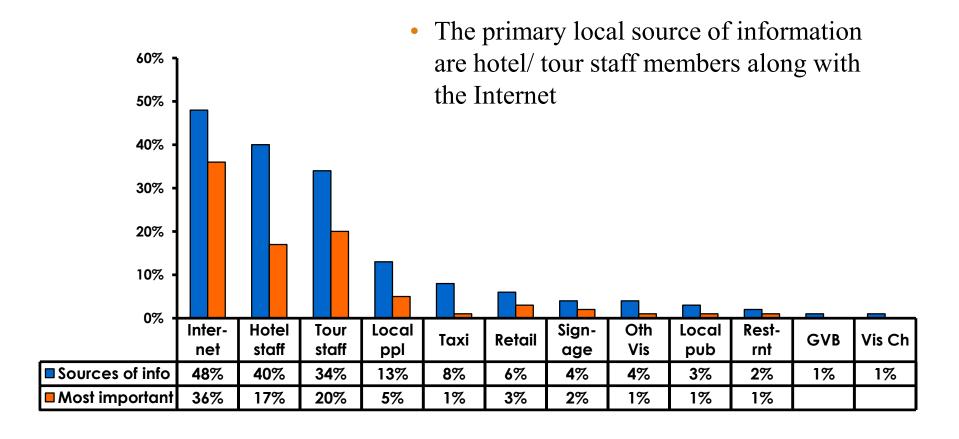


Sources of Information Pre-arrival



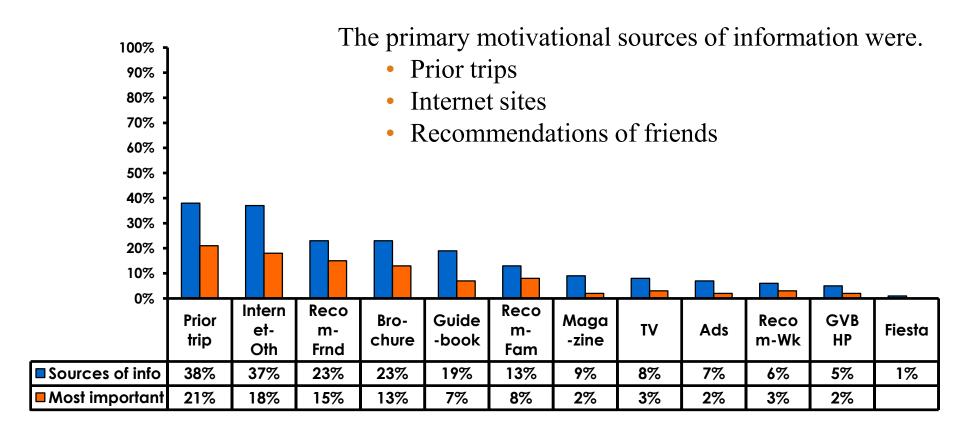


Sources of Information Post-arrival





Sources of Information - Motivation

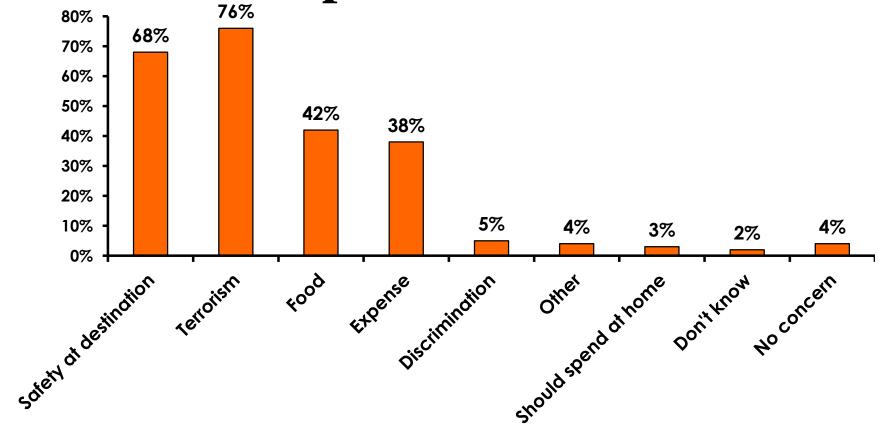




SECTION 6 OTHER ISSUES



Concerns about travel outside of Japan - Overall



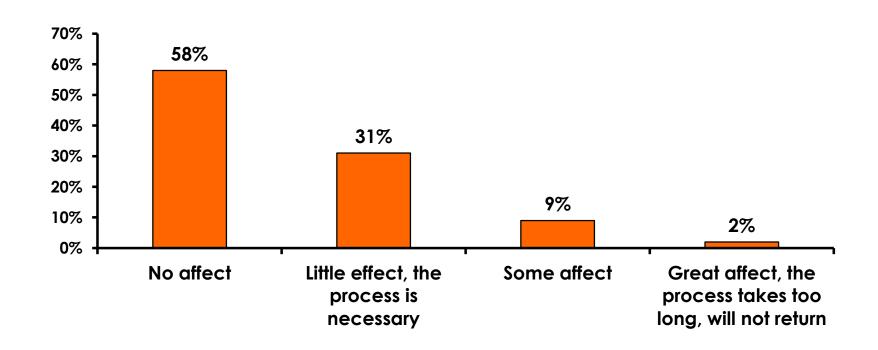


Concerns about travel outside of Japan - By Age & Income

TOTAL AGE					Ε	Q26								
		-	18-24	25-34	35-49	50+	<y2.0 million<="" td=""><td>Y2.0M-Y3.0M</td><td>Y3.0M-Y4.0M</td><td>Y4.0M-Y5.0M</td><td>Y5.0M-Y7.0M</td><td>Y7.0M-Y10.0M</td><td>Y10.0M+</td><td>No Income</td></y2.0>	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	76%	74%	79%	76%	71%	88%	76%	83%	68%	82%	79%	72%	54%
	Safety	68%	72%	66%	69%	61%	63%	76%	76%	71%	75%	67%	64%	46%
	Food	42%	50%	35%	44%	29%	42%	55%	46%	49%	37%	43%	38%	23%
	Expense	38%	46%	37%	36%	21%	38%	39%	43%	46%	33%	40%	33%	31%
	Discrimination against Japanese	5%	7%	4%	6%	3%	17%	3%	6%		4%	5%	5%	
	No concerns	4%	2%	3%	6%	13%		3%	13%		2%	2%	10%	8%
	Other	4%	6%	5%	4%	3%	4%	3%	6%	2%	2%	5%	5%	8%
	Should spend at home	3%	6%	2%	5%		8%	3%	2%	5%	2%	2%		8%
	Don't know	2%	2%	3%	1%	5%				2%				
	Total Count	344	109	110	84	38	24	33	54	41	51	42	39	13



Security Screening/Immigration Process at Guam International Airport





Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

