

GUAM VISITORS BUREAU Japan Visitor Tracker Exit Profile FY2016 OCTOBER 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

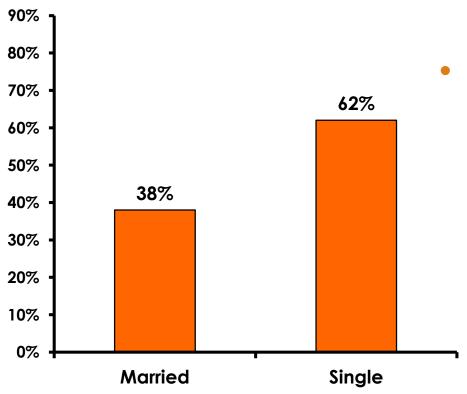
- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction,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



SECTION 1 PROFILE OF RESPONDENTS



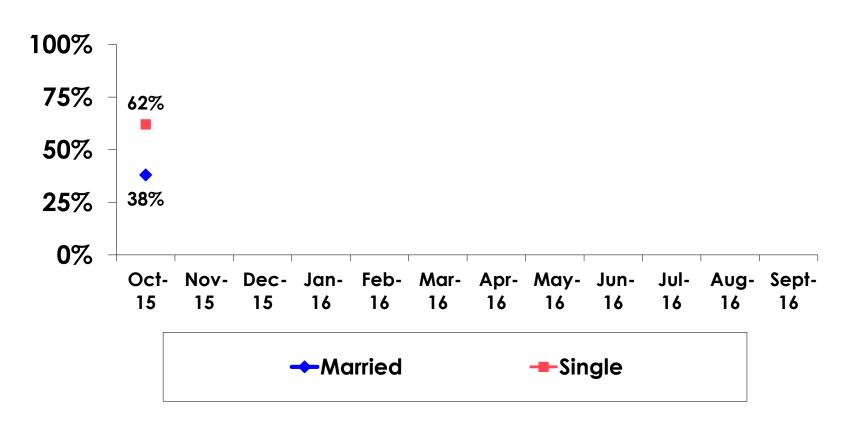
Marital Status - Overall



• 46% of repeat visitors are married.

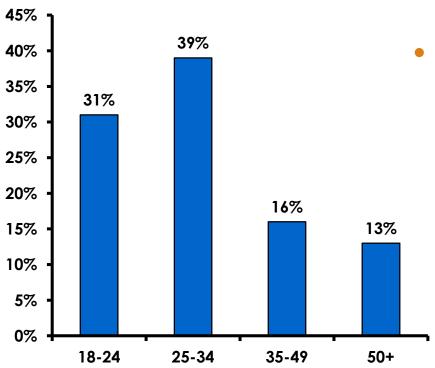


MARITAL STATUS





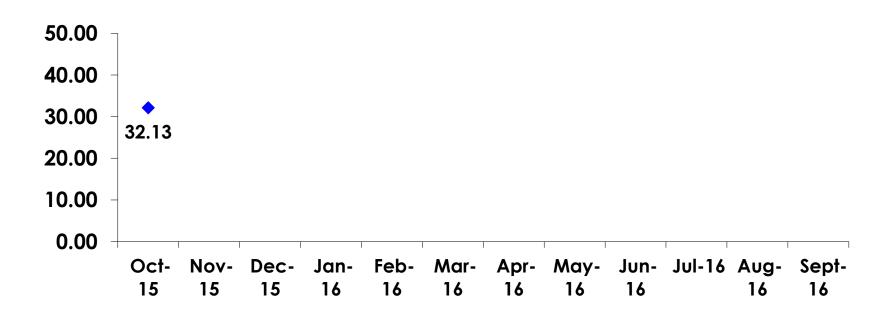
Age - Overall



The average age of the respondents is 32.13 years of age.

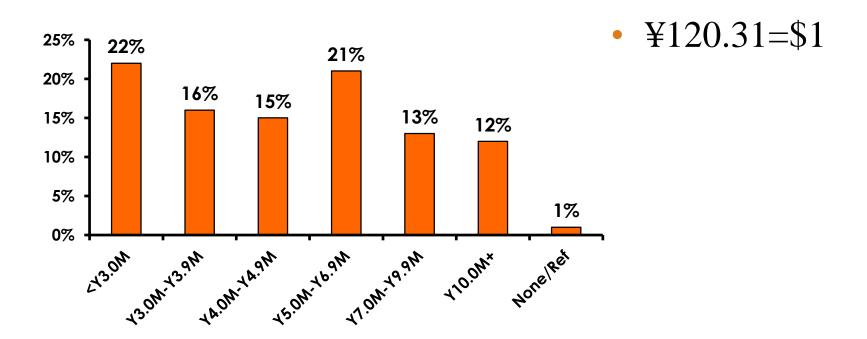


AVERAGE - AGE



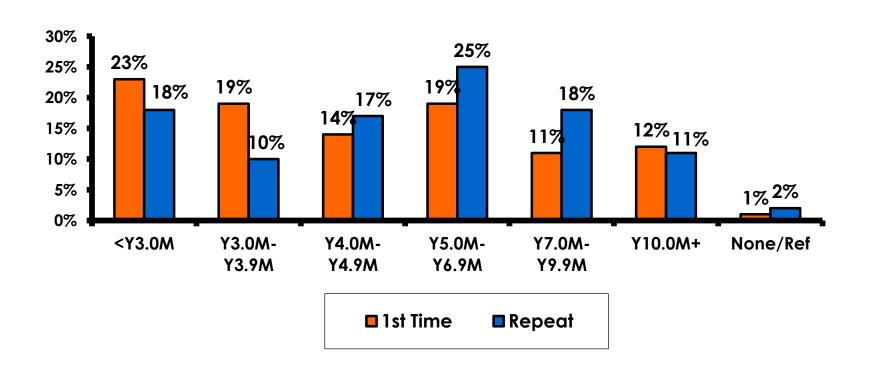


Personal Income





Personal Income – 1st time vs. repeat



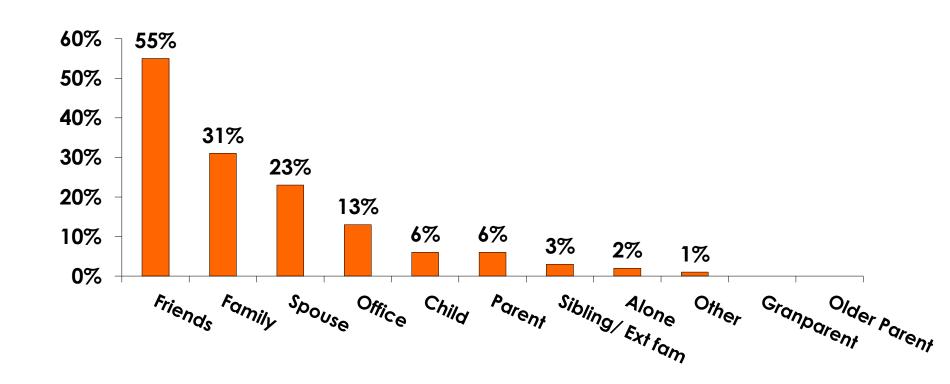


Personal Income by Gender & Age

			TOTAL	GEN	DER		AG	Ε	
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<y2.0 million<="" td=""><td>Count</td><td>21</td><td>7</td><td>14</td><td>12</td><td>5</td><td></td><td>4</td></y2.0>	Count	21	7	14	12	5		4
		Column N %	7%	4%	9%	14%	4%		9%
	Y2.0M-Y3.0M	Count	46	15	31	16	24	2	4
		Column N %	15%	9%	21%	19%	19%	4%	9%
	Y3.0M-Y4.0M	Count	49	24	25	5	30	7	7
		Column N %	16%	15%	17%	6%	23%	13%	16%
	Y4.0M-Y5.0M	Count	47	30	17	7	24	9	7
		Column N %	15%	18%	11%	8%	19%	17%	16%
	Y5.0M-Y7.0M	Count	66	38	28	14	28	14	10
		Column N %	21%	23%	19%	16%	22%	26%	23%
	Y7.0M-Y10.0M	Count	42	31	11	14	11	11	6
		Column N %	13%	19%	7%	16%	9%	20%	14%
	Y10.0M+	Count	37	18	19	16	5	10	6
		Column N %	12%	11%	13%	19%	4%	19%	14%
	No Income	Count	4	1	3	2	1	1	
		Column N %	1%	1%	2%	2%	1%	2%	
	Total	Count	312	164	148	86	128	54	44



Travel Companions

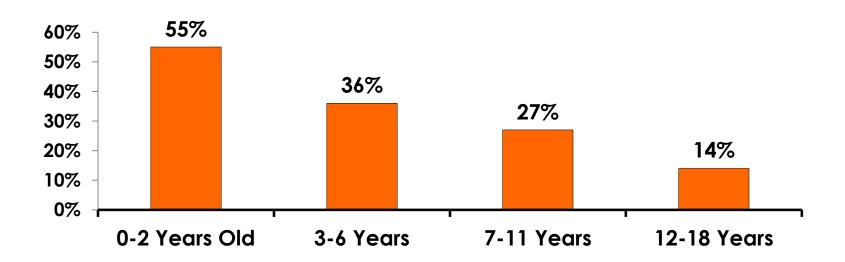




Number of Children Travel Party

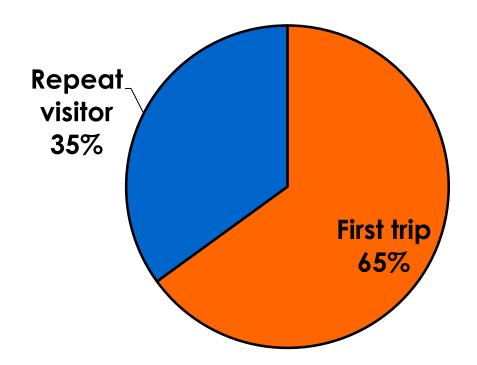
N=22 total respondents traveling with children.

(Of those N=22 respondents, there is a total of 34 children 18 years or younger)



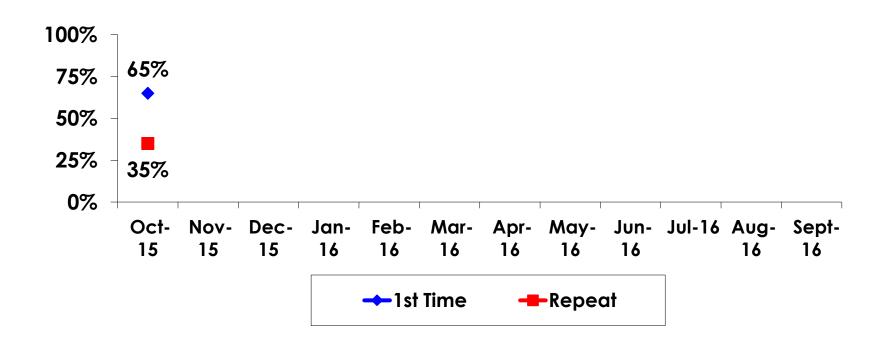


Prior Trips to Guam





PRIOR TRIPS TO GUAM





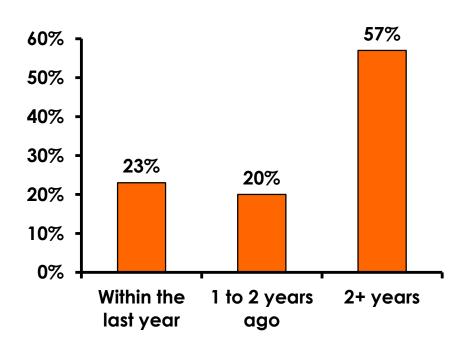
Trips to Guam by Age & Gender

			TOTAL	TRIPS T	O GUAM
			-	1st	Repeat
GENDER	Male	Count	174	117	57
		Column N %	50%	52%	46%
	Female	Count	177	110	67
		Column N %	50%	48%	54%
	Total	Count	351	227	124
AGE	18-24	Count	110	83	27
		Column N %	31%	37%	22%
	25-34	Count	138	99	39
		Column N %	39%	44%	31%
	35-49	Count	57	27	30
		Column N %	16%	12%	24%
	50+	Count	45	17	28
		Column N %	13%	8%	23%
	Total	Count	350	226	124

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



Repeat Visitors Last Trip n = 118

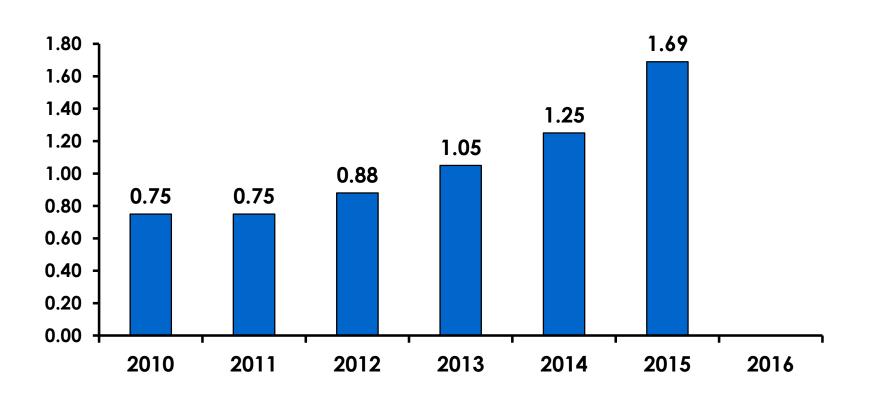


- The average repeat visitor has been to Guam 6.62 times.
- Less than half of repeat visitors have been to Guam within the last 2 years.



Average Number Overnight Trips

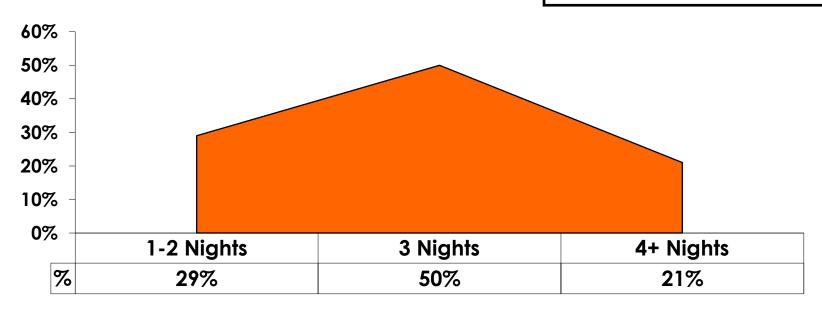
(2010-2016) (2 nights or more)





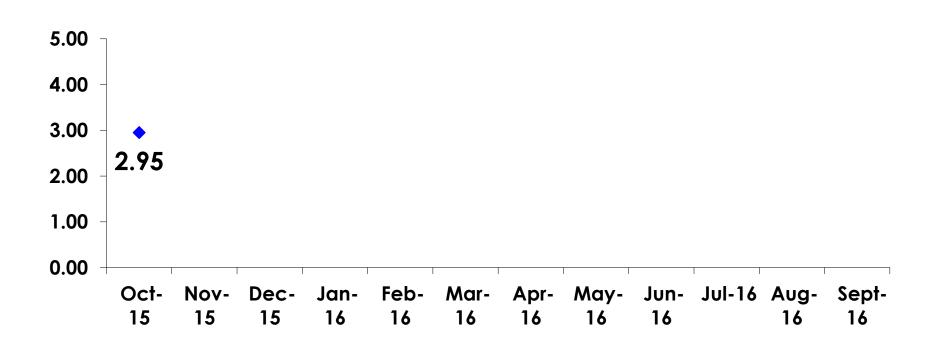
Length of Stay

Mean = 2.95 Days Median = 3.0 Days





AVG LENGTH OF STAY





Occupation by Income

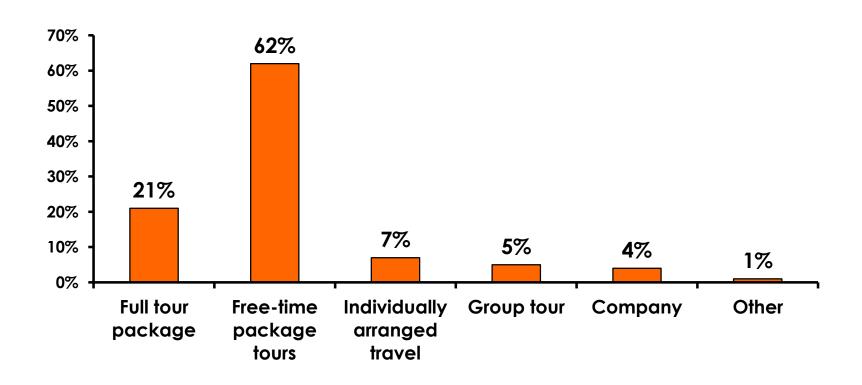
			TOTAL	Q26							
		\vdash	-	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
		-	-			13.0W-14.0W	14.0W-15.0W	T5.0W-T7.0W		TTU.UWF	
Q25	Engineer		19%	10%	17%	35%	19%	23%	19%		25%
	Office worker non-mgr		16%	5%	24%	14%	13%	15%	19%	16%	
	Student		14%	29%				9%	19%	30%	50%
	Salesperson		11%	14%	17%	12%	19%	12%	7%	5%	
	Professional/ Specialist		7%		7%	4%	15%	9%	2%	8%	
	Self-employed		6%		9%	2%	9%	11%	2%	5%	
	Manager		5%		2%	4%	6%	6%	12%	5%	
	Skilled worker		5%	5%	7%	8%	9%	2%	7%	3%	
	Homemaker		4%	5%			2%	6%	2%	11%	
	Freeter		3%	5%	7%	2%			2%	5%	
	Other		3%	5%	7%	4%		3%			25%
	Executive (30+ employees)		2%	10%		2%				11%	
	Retired		1%			6%	2%	2%			
	Free-lancer		1%	5%		2%	4%		2%		
	Govt- office worker non- mgr		1%	5%	2%	2%		2%	2%		
	Unemployed		1%	5%		2%	2%				
	Teacher		0%		2%						
	Govt- Manager		0%						2%		
	Total C	ount	340	21	46	49	47	65	42	37	4



SECTION 2 TRAVEL PLANNING



Travel Planning - Overall





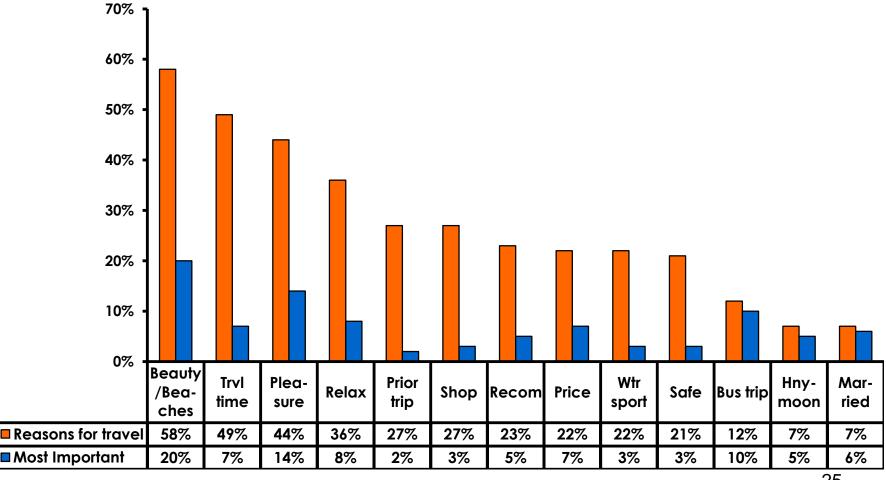
Accommodation by Income

Average length of stay: 2.95 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		16%	24%	20%	12%		15%	14%	16%	25%
	Hilton Guam Resort		10%	5%	11%	8%	6%	9%	19%	8%	
	Guam Reef & Olive Spa		9%	5%	9%	8%	11%	11%	10%	14%	
	Fiesta Resort Guam		7%	10%		12%	9%	6%	5%	11%	25%
	Hotel Nikko Guam		6%	5%	7%	8%	9%	5%	7%	3%	
	Onward Beach Resort		5%	5%	11%	2%	4%	9%	10%		
	Grand Plaza Hotel		5%		4%	6%	4%	5%	5%	3%	25%
	Pacific Star Resort & Spa		5%	10%	7%	4%	9%	2%	5%	3%	
	Outrigger Guam Resort		5%			6%	11%	6%	2%	5%	
	Holiday Resort Guam		5%	5%	4%	8%	6%	2%	5%	5%	
	Royal Orchid Guam		5%	5%	2%	4%	9%	5%		11%	
	Westin Resort Guam		5%	5%	7%	2%	6%	8%		5%	
	Hyatt Regency Guam		4%		9%	6%	4%	3%	5%		
	Other		3%	10%	7%	2%		3%	2%	3%	
	Leo Palace Resort		3%		2%	4%	4%	2%	5%	3%	
	Aqua Suites		2%	10%			2%	3%	5%	3%	
	PIC Club		2%	5%			4%	3%	2%	3%	25%
	Pacific Bay Hotel		1%			2%		2%		5%	
	Sheraton Laguna Guam		1%		2%		2%	2%			
	Hotel Santa Fe		1%			4%					
	Dusit Thani Guam		0%					2%			
	Home stay/ friend/ relative		0%								
	Oceanview Hotel		0%								
	Bayview Hotel		0%					2%			
	Total	Count	351	21	46	49	47	66	42	37	4



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	E		GENDER		
			-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty		58%	65%	60%	51%	42%	51%	64%	
	Short travel time		49%	49%	53%	46%	44%	45%	53%	
	Pleasure		44%	56%	45%	35%	27%	42%	47%	
	Relax		36%	31%	41%	39%	31%	32%	40%	
	Previous trip		27%	21%	19%	40%	51%	24%	30%	
	Shopping		27%	29%	30%	18%	24%	18%	36%	
	Recomm- friend/family/trvl agnt		23%	33%	19%	14%	22%	19%	26%	
	Price		22%	29%	21%	11%	20%	18%	26%	
	Water sports		22%	28%	22%	18%	11%	20%	24%	
	Safe		21%	19%	23%	19%	24%	22%	21%	
	Company/ Business Trip		12%	10%	8%	23%	16%	16%	8%	
	Honeymoon		7%	1%	14%	5%		10%	3%	
	Married/ Attn wedding		7%	3%	10%	4%	11%	8%	6%	
	Scuba		6%	6%	8%	5%	2%	7%	5%	
	Golf		2%		1%	5%	9%	3%	1%	
	Visit friends/ Relatives		2%	3%	3%	2%		1%	4%	
	Other		2%	2%	1%	4%	4%	2%	2%	
	Organized sports		1%	2%	1%	2%	2%	1%	2%	
	Company Sponsored		1%		1%	2%		1%		
	Total	Count	347	109	135	57	45	173	174	



Motivation by Income

			TOTAL		Q26						
				- 10 0 111						3/40.014	I NI - 1
			-	<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
Q5A	Natural beauty		58%	50%	61%	59%	48%	56%	67%	70%	67%
	Short travel time		49%	40%	52%	51%	50%	47%	45%	65%	67%
	Pleasure		44%	35%	43%	45%	35%	44%	50%	65%	
	Relax		36%	15%	37%	43%	33%	35%	43%	49%	33%
	Previous trip		27%	30%	26%	14%	26%	32%	36%	22%	67%
	Shopping		27%	10%	33%	16%	24%	20%	38%	41%	
	Recomm- friend/family/trvl agnt		23%	40%	15%	16%	20%	23%	26%	27%	
	Price		22%	15%	26%	35%	9%	17%	24%	32%	33%
	Water sports		22%	15%	20%	35%	22%	18%	17%	24%	33%
	Safe		21%	25%	15%	22%	15%	27%	21%	32%	
	Company/ Business Trip		12%	15%	15%	14%	15%	11%	14%	5%	
	Honeymoon		7%	10%	9%	6%	11%	11%	2%	3%	
	Married/ Attn wedding		7%	5%	4%	10%	11%	9%	5%		
	Scuba		6%	15%	2%	6%	7%	8%	7%	8%	
	Golf		2%	5%		2%	4%	2%	5%	3%	
	Visit friends/ Relatives		2%			6%	2%			3%	
	Other		2%		2%	2%		3%	5%		
	Organized sports		1%		2%	4%			2%		
	Company Sponsored		1%					2%	2%		
	Total	Count	347	20	46	49	46	66	42	37	3



SECTION 3 EXPENDITURES

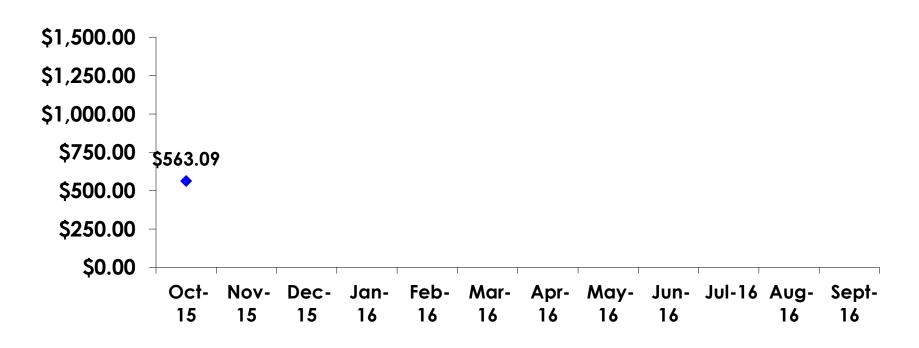


Prepaid Expenditures ¥120.31/US\$1

- \$1,006.30 = overall mean average prepaid expense (for entire travel party size) by respondent
- $\$0 = \min \text{minimum}$ (lowest amount recorded for the entire sample)
- \$9,974 = maximum (highest amount recorded for the entire sample)
- \$563.09 = overall mean average <u>per person</u> prepaid expenditures



PREPAID EXPENDITURES Per Person



YTD=\$563.09



Breakdown of Prepaid Expenditures ¥120.31=\$1

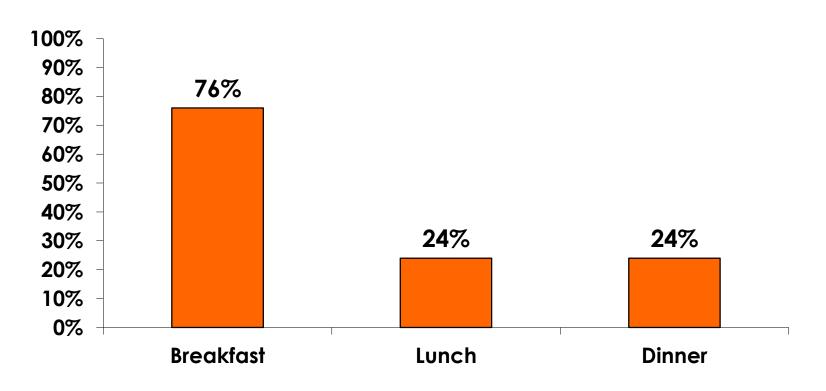
(Filter: Only those who responded/ Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,054.88
Air & Accommodation w/ daily meal package	\$1,691.09
Air only	\$873.61
Accommodation only	\$783.39
Accommodation w/ daily meal only	\$1,246.78
Food & Beverages in Hotel	\$166.24
Ground transportation – Japan	\$70.47
Ground transportation – Guam	\$47.79
Optional tours/ activities	\$164.05
Other expenses	\$154.11
Total Prepaid	\$1,006.30



PREPAID MEAL BREAKDOWN

Air/Accommodations with Daily Meal Pkg. n=37



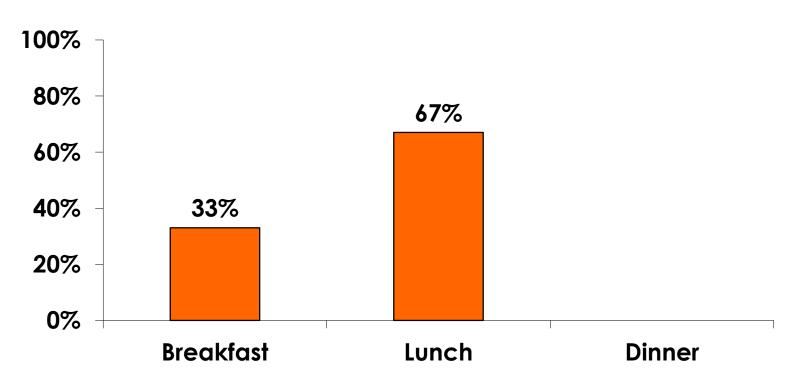
Mean=\$1,691.09 per travel party



PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

$$n=3$$

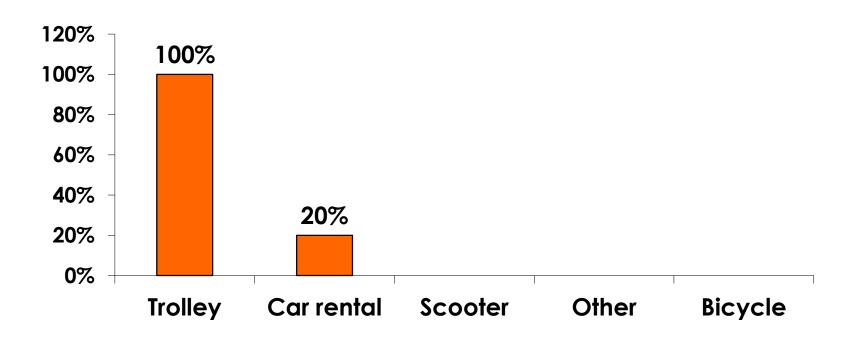


Mean=\$1,246.78 per travel party



PREPAID GROUND TRANSPORTATION

n=5



Mean=\$47.79 per travel party

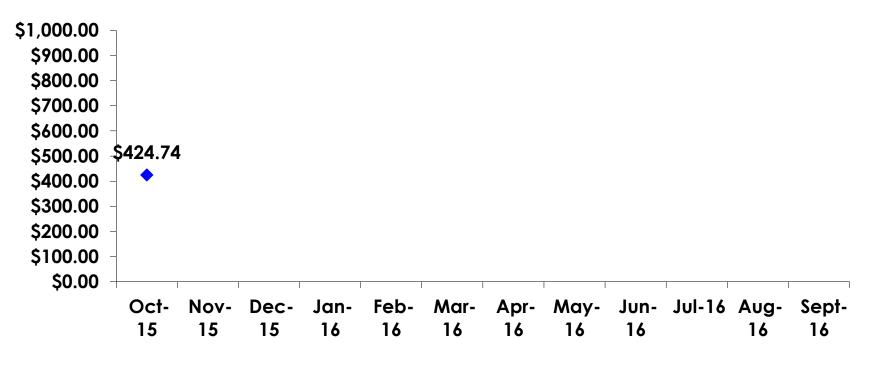


On-Island Expenditures

- \$635.72 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,000 = Maximum (highest amount recorded for the entire sample)
- \$424.74 = overall mean average <u>per person</u> onisland expenditure



ON-ISLAND EXPENDITURES Per Person



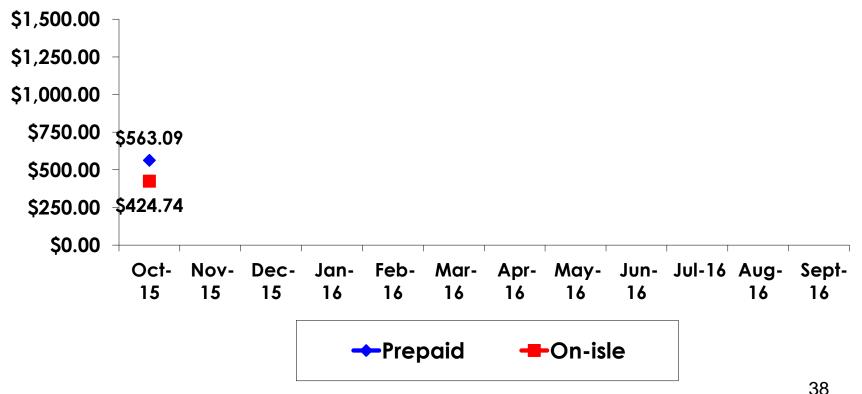
YTD = \$424.74



PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$563.09

On-Isle YTD = \$424.74





Total On-Island Expenditure by Gender & Age

TOTAL GENDER				DER	GENDER								
					Ма	le		Female					
					AGE				AGE				
		-	Male	Female	18-24 25-34 35-49 50+				18-24	25-34	35-49	50+	
PER PERSON	Mean	\$424.74	\$430.26	\$419.31	\$345.82	\$424.69	\$449.16	\$536.69	\$320.86	\$517.73	\$335.82	\$509.68	
	Median	\$333	\$343	\$303	\$310	\$400	\$290	\$285	\$300	\$380	\$249	\$300	
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$76	\$0	\$0	\$0	\$0	
	Maximum	\$4,000	\$4,000	\$3,000	\$1,300	\$2,000	\$3,000	\$4,000	\$1,000	\$3,000	\$1,000	\$2,054	



On-Island Expenditure Categories by Gender & Age

		TOTAL	GEN	DER	AGE					
		-	Male	Female	18-24	25-34	35-49	50+		
F&B HOTEL	Mean	\$30.03	\$36.76	\$23.42	\$13.67	\$28.28	\$42.75	\$55.53		
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
F&B FF/STORE	Mean	\$37.01	\$45.67	\$28.49	\$28.94	\$40.16	\$28.63	\$58.49		
	Median	\$3	\$10	\$0	\$2	\$10	\$0	\$0		
F&B RESTRNT	Mean	\$101.89	\$157.91	\$46.83	\$54.72	\$74.42	\$162.46	\$213.69		
	Median	\$0	\$50	\$0	\$0	\$0	\$50	\$15		
OPT TOUR	Mean	\$50.66	\$56.47	\$44.94	\$41.01	\$58.25	\$40.25	\$65.27		
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
GIFT- SELF	Mean	\$156.70	\$176.16	\$137.58	\$57.35	\$197.59	\$188.89	\$232.44		
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
GIFT- OTHER	Mean	\$98.48	\$119.11	\$78.20	\$57.86	\$105.86	\$145.04	\$118.36		
	Median	\$35	\$50	\$20	\$20	\$50	\$50	\$50		
TRANS	Mean	\$16.62	\$24.08	\$9.28	\$11.14	\$15.64	\$22.81	\$25.53		
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
OTHER	Mean	\$144.32	\$132.70	\$155.76	\$110.15	\$153.51	\$151.47	\$193.82		
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
TOTAL	Mean	\$635.72	\$748.86	\$524.50	\$374.85	\$673.71	\$782.30	\$963.13		
	Median	\$420	\$500	\$360	\$330	\$500	\$500	\$500		

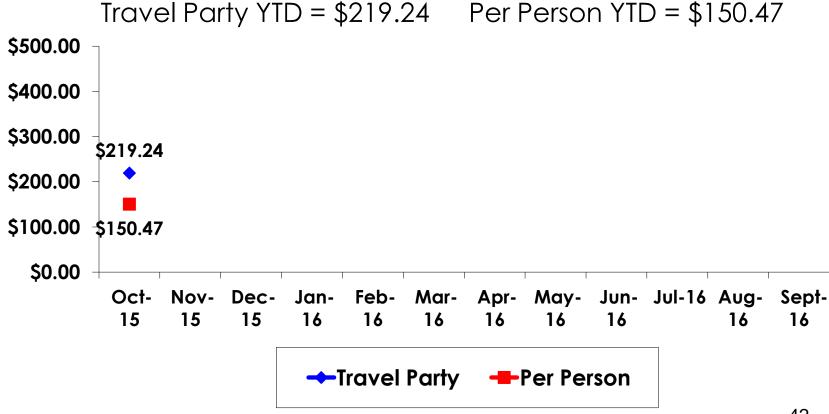


On-Island Expenditures First Timers & Repeaters

	TOTAL	TRIPS T	O GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$30.03	\$24.09	\$40.92
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$37.01	\$28.34	\$52.86
	Median	\$3	\$0	\$20
F&B RESTRNT	Mean	\$101.89	\$100.27	\$104.87
	Median	\$0	\$0	\$25
OPT TOUR	Mean	\$50.66	\$47.72	\$56.02
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$156.70	\$129.86	\$205.85
	Median	\$0	\$0	\$30
GIFT- OTHER	Mean	\$98.48	\$87.95	\$117.76
	Median	\$35	\$30	\$50
TRANS	Mean	\$16.62	\$11.49	\$26.01
	Median	\$0	\$0	\$0
OTHER	Mean	\$144.32	\$125.44	\$178.89
	Median	\$0	\$0	\$0
TOTAL	Mean	\$635.72	\$555.17	\$783.18
	Median	\$420	\$400	\$500



ON-ISLE EXPENDITURES – Per Day



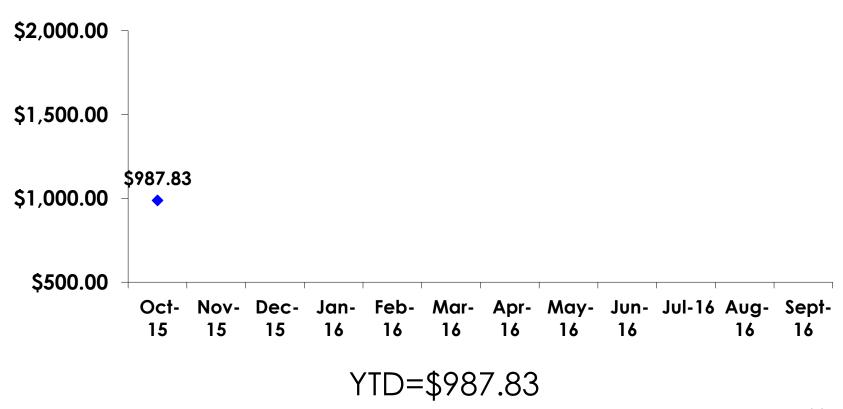


Total Expenditures Per Person (Prepaid & On-Island)

- \$987.83 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,623 = Maximum (highest amount recorded for the entire sample)



TOTAL EXPENDITURES Per Person



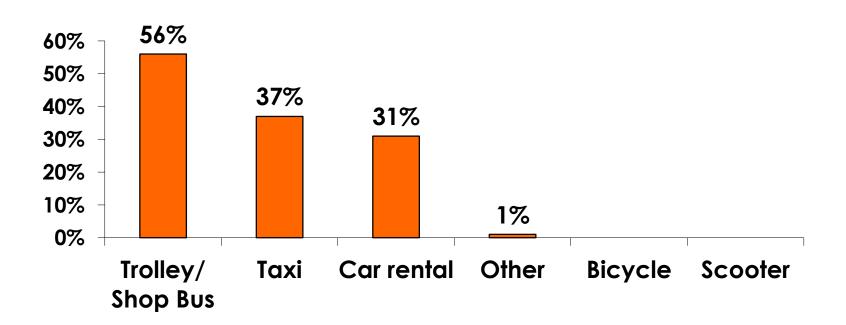


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$30.03
Food & beverage in fast food restaurant/convenience store	\$37.01
Food & beverage at restaurants or drinking establishments outside a hotel	\$101.89
Optional tours and activities	\$50.66
Gifts/ souvenirs for yourself/companions	\$156.70
Gifts/ souvenirs for friends/family at home	\$98.48
Local transportation	\$16.62
Other expenses not covered	\$144.32
Average Total	\$635.72



Local Transportation_{n=75}



Mean=\$14.41 per travel party



Guam Airport Expenditures

- \$26.46 = Mean
- \$7 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,600 = Maximum (highest amount recorded for the entire sample)



Breakdown of Airport Expenditures

	MEAN \$
Food & Beverages	\$8.39
Gifts/Souvenirs Self	\$10.58
Gifts/Souvenirs Others	\$7.48
Total	\$26.46



SECTION 4 VISITOR SATISFACTION

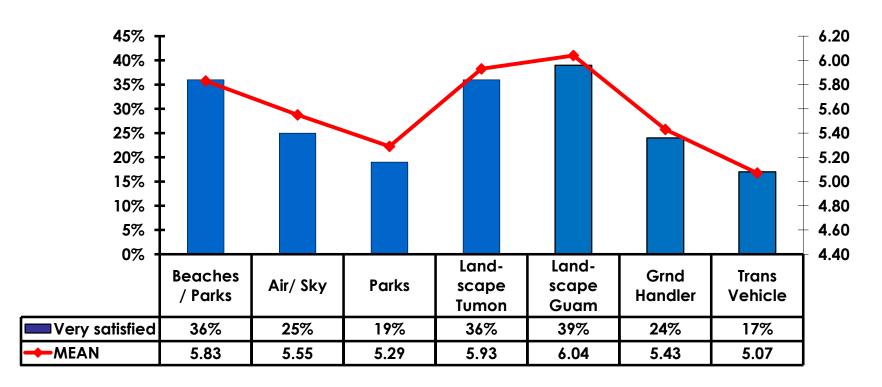


Satisfaction Scores Overall



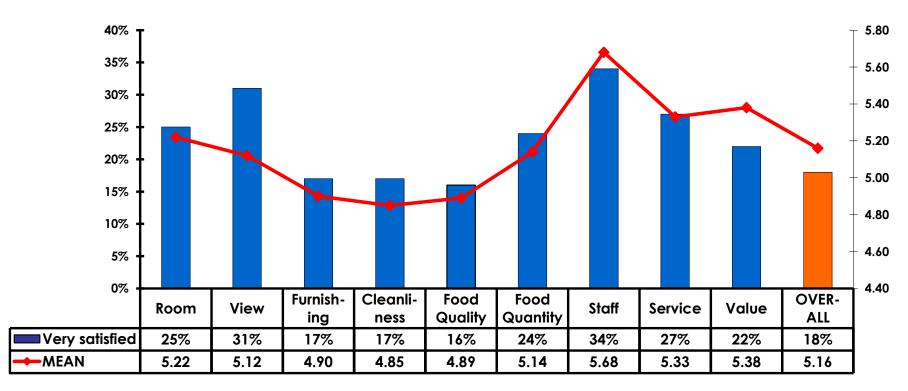


Satisfaction Quality/ Cleanliness



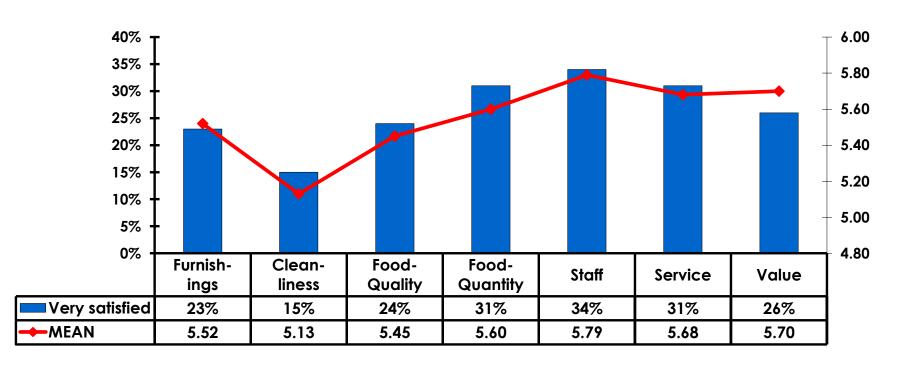


Quality of Accommodations



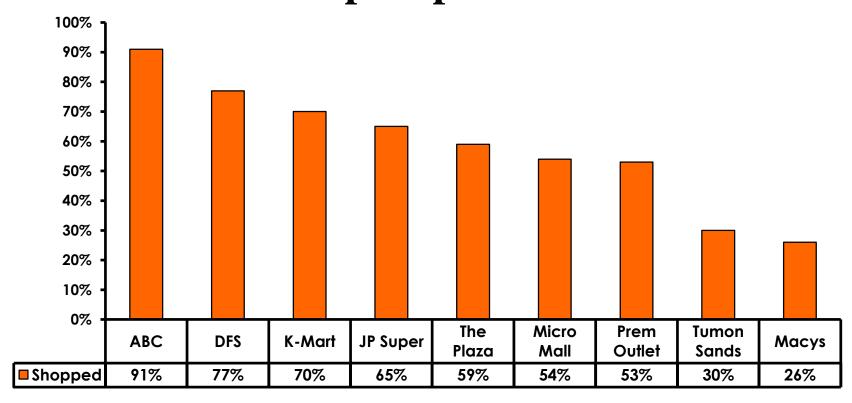


Quality of Dining Experience





Visits to Shopping Centers/Malls on Guam Top responses



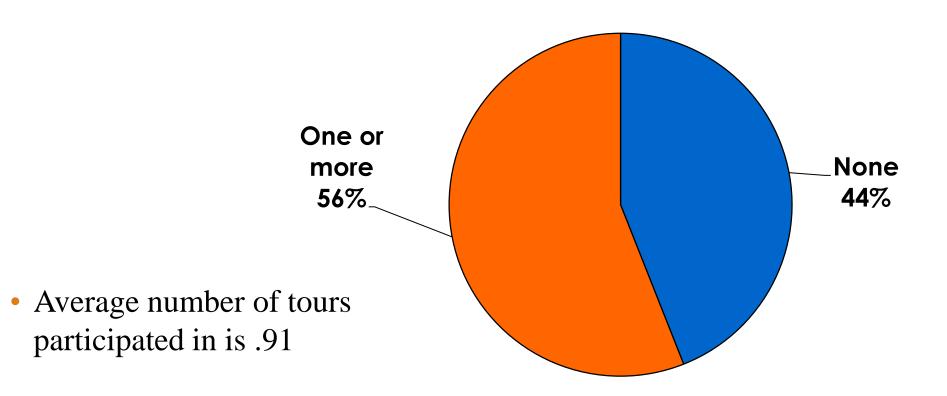


Satisfaction with Shopping

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 57 %	Score of 6 to 7 = 55%
Score of 4 to 5 = 39%	Score of 4 to 5 = 39%
Score 1 to 3 = 4 %	Score 1 to 3 = 6%
MEAN = 5.49	MEAN = 5.43

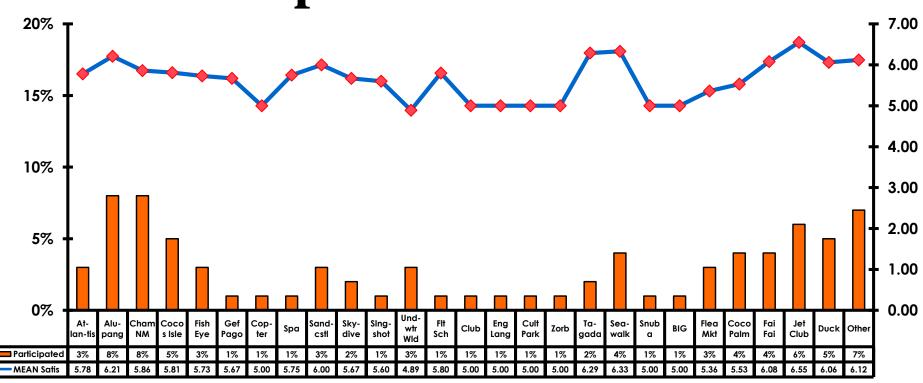


Optional Tour Participation





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 = 57%
Score of 4 to 5 = 36%	Score of 4 to 5 = 43 %
Score 1 to 3 = 3 %	Score 1 to 3 = 1%
MEAN = 5.55	MEAN = 5.48

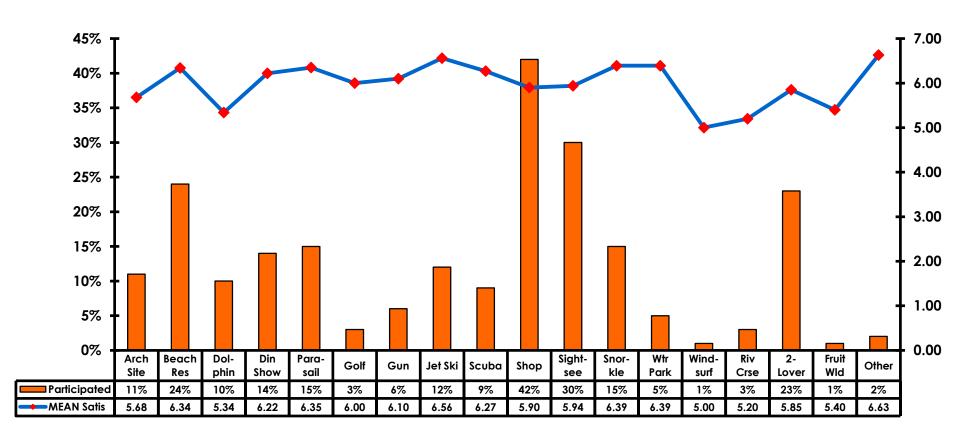


Night Tours Satisfaction

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 34%	Score of 6 to 7 = 33%
Score of 4 to 5 = 63 %	Score of 4 to 5 = 65 %
Score 1 to 3 = 3 %	Score 1 to 3 = %
MEAN = 4.85	MEAN = 4.85

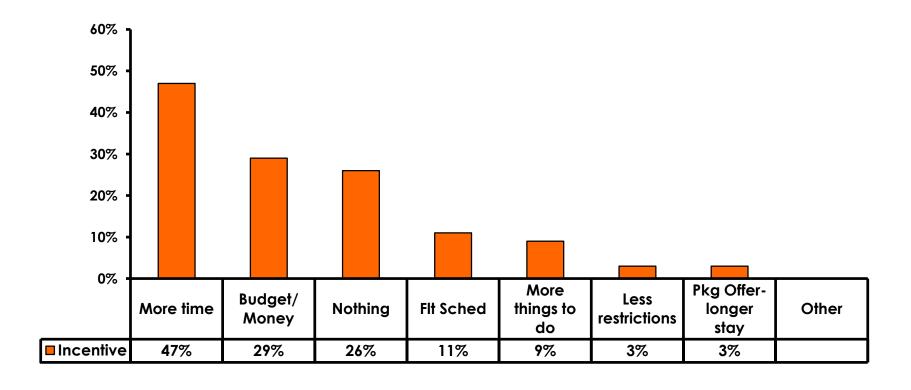


Satisfaction with Other Activities



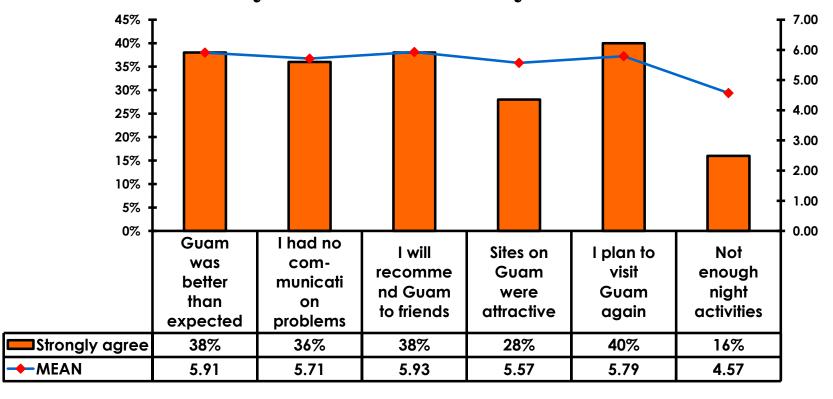


What would it take to make you want to stay an extra day in Guam?



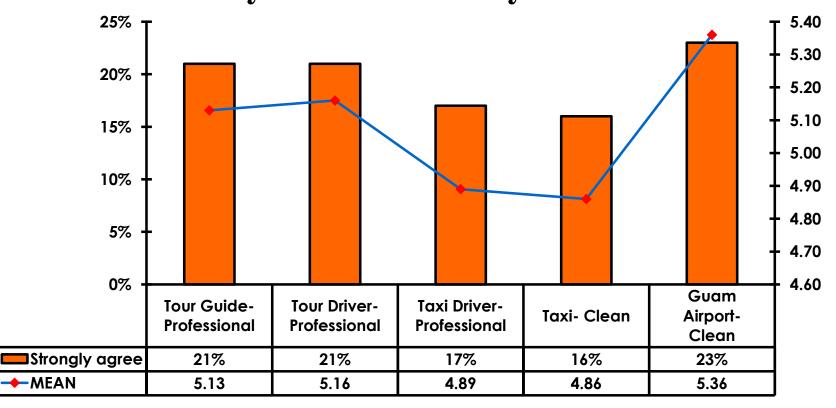


On-Island Perceptions





On-Island Perceptions

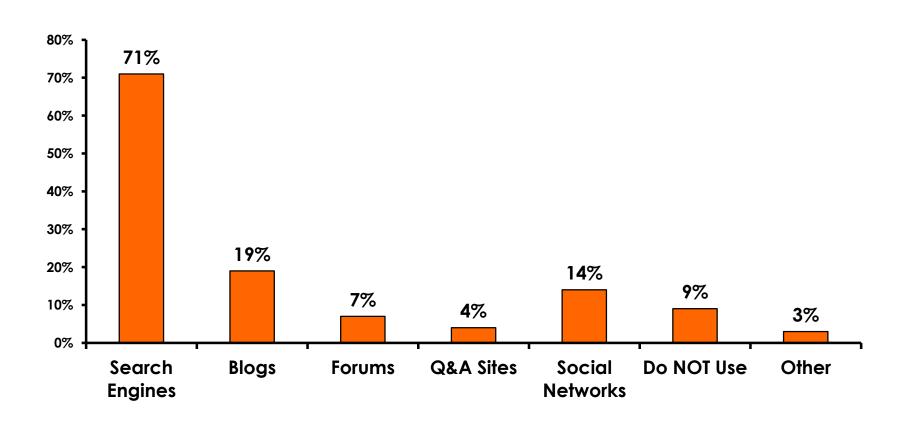




SECTION 5 PROMOTIONS

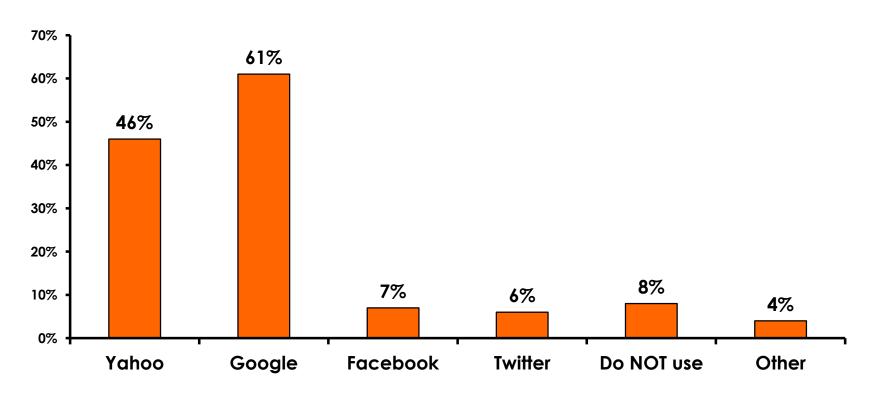


Internet- Guam Sources of Info



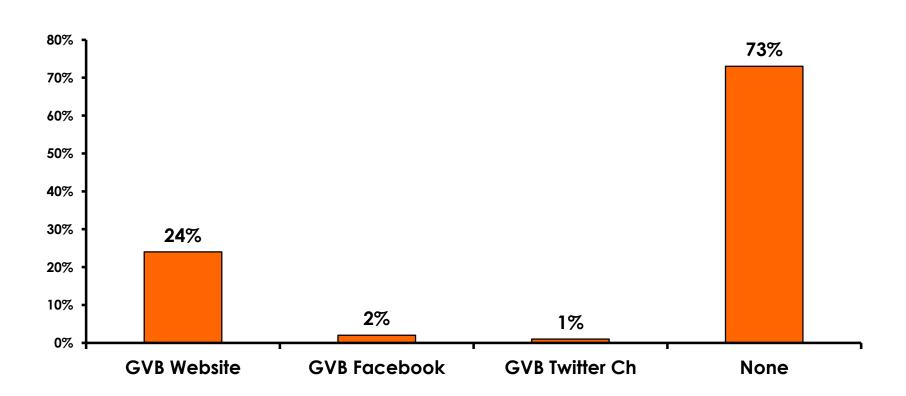


Internet- Things To Do Sources of Info



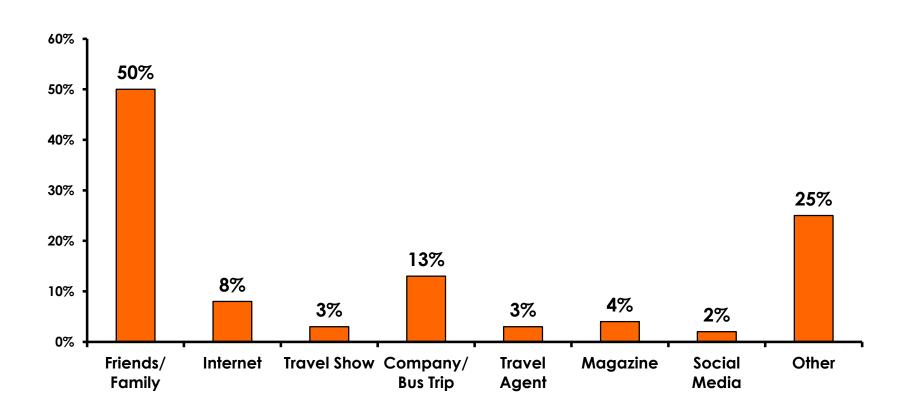


Internet- GVB Sources



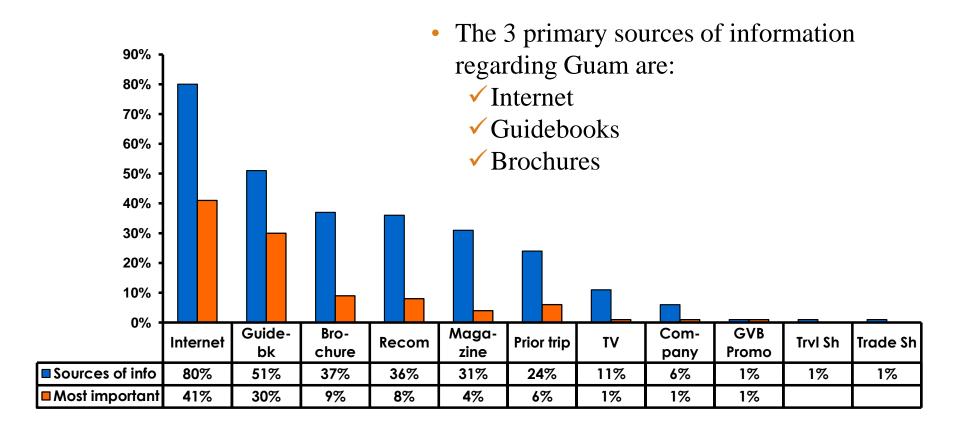


Travel Motivation-Info Sources



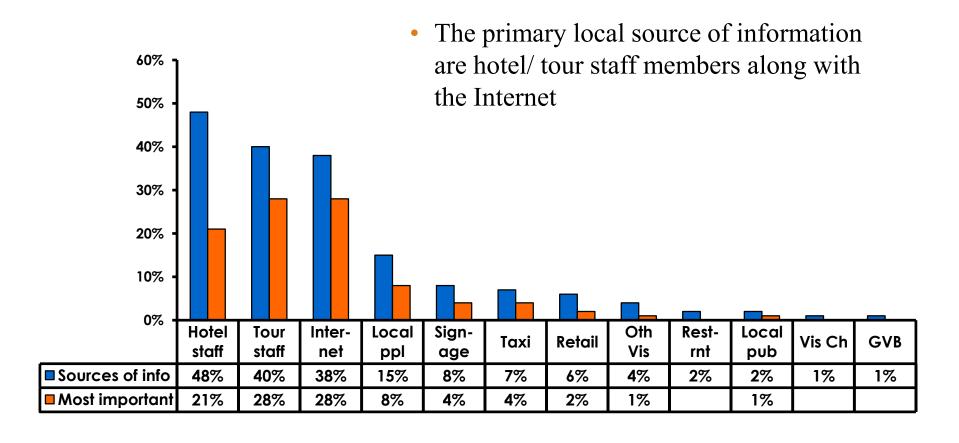


Sources of Information Pre-arrival



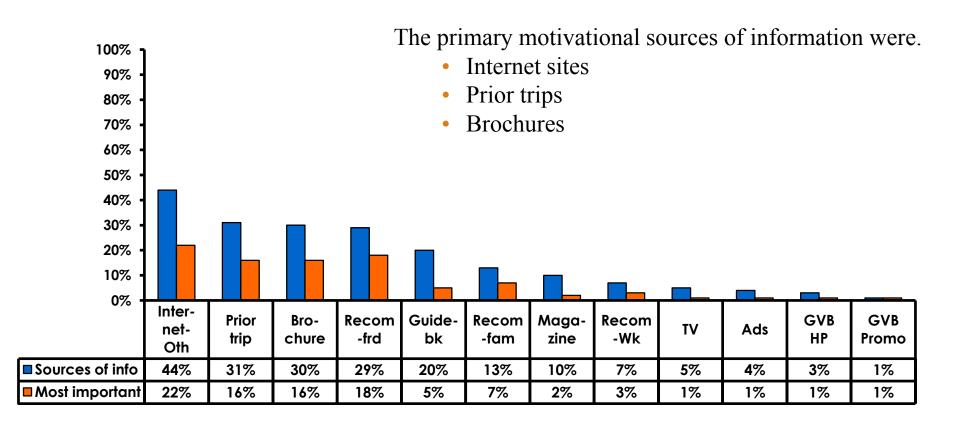


Sources of Information Post-arrival





Sources of Information - Motivation

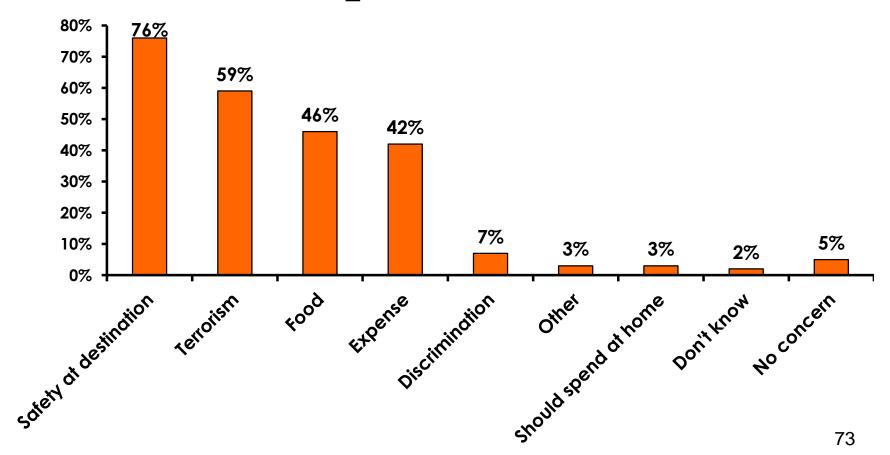




SECTION 6 OTHER ISSUES



Concerns about travel outside of Japan - Overall



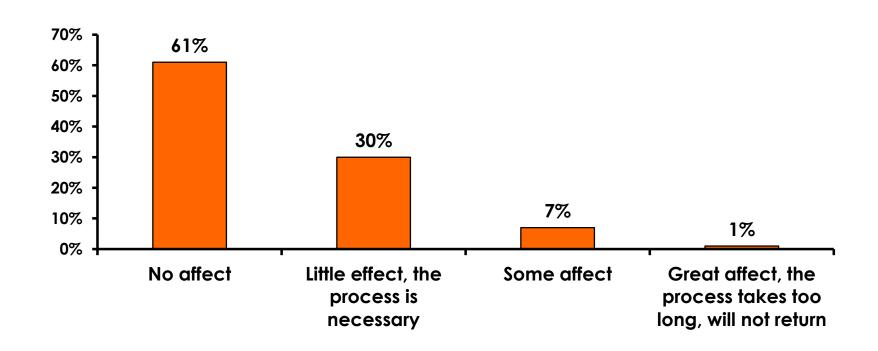


Concerns about travel outside of Japan - By Age & Income

TOTAL				AC	ξE			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	Safety	76%	74%	82%	72%	71%	71%	78%	82%	77%	79%	76%	78%	50%
	Terrorism	59%	54%	61%	61%	62%	57%	59%	67%	57%	53%	62%	57%	75%
	Food	46%	36%	52%	47%	51%	14%	50%	63%	51%	44%	48%	46%	75%
	Expense	42%	40%	48%	37%	36%	33%	48%	53%	43%	52%	29%	38%	25%
	Discrimination against Japanese	7%	7%	9%	4%	4%	5%	7%	10%	4%	6%	10%	8%	
	No concerns	5%	5%	2%	7%	9%	10%	4%	6%	2%		7%	5%	25%
	Other	3%	4%	4%	2%	2%		4%	6%	4%	5%	2%		25%
	Should spend at home	3%	4%	2%	2%	7%		11%		2%	2%	5%	3%	25%
	Don't know	2%	3%	2%				2%		2%	2%			
	Total Co	unt 350	110	137	57	45	21	46	49	47	66	42	37	4



Security Screening/Immigration Process at Guam International Airport





Airport Screening

7pt Rating Scale

