

GUAM VISITORS BUREAU Japan Visitor Tracker Exit Profile FY2016 SEPTEMBER 2016



Prepared by: QMark Research

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Background & Methodology

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



OBJECTIVES

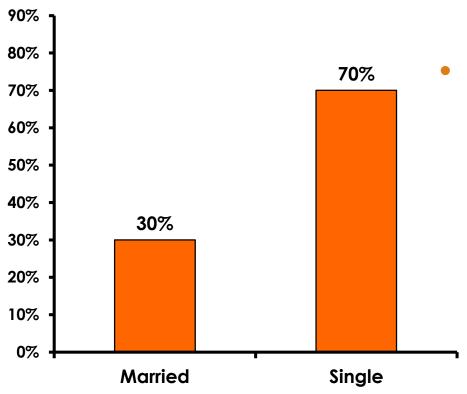
- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction,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



SECTION 1 PROFILE OF RESPONDENTS



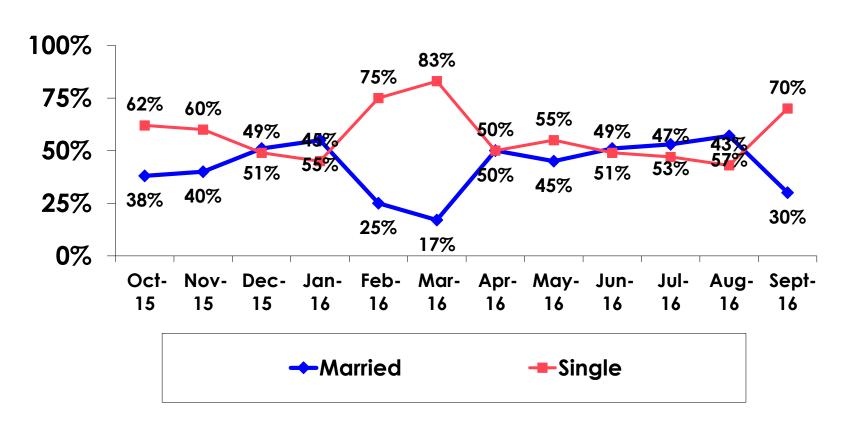
Marital Status - Overall



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

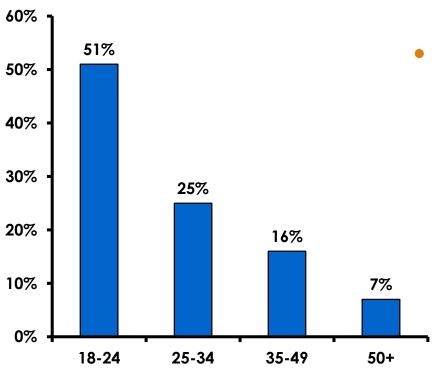


MARITAL STATUS





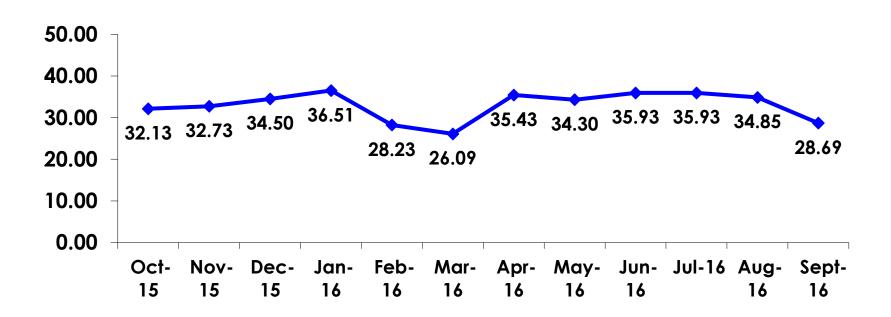
Age - Overall



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

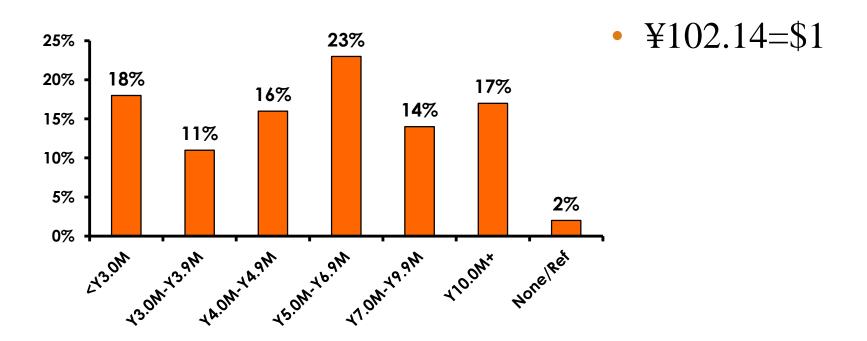


AVERAGE - AGE



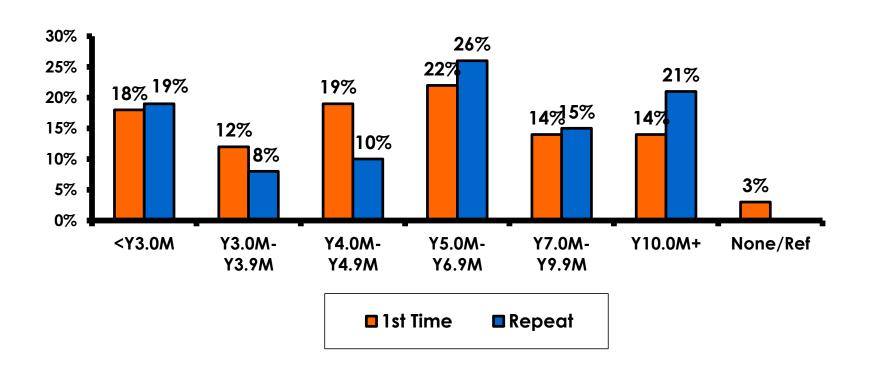


Personal Income





Personal Income – 1st time vs. repeat



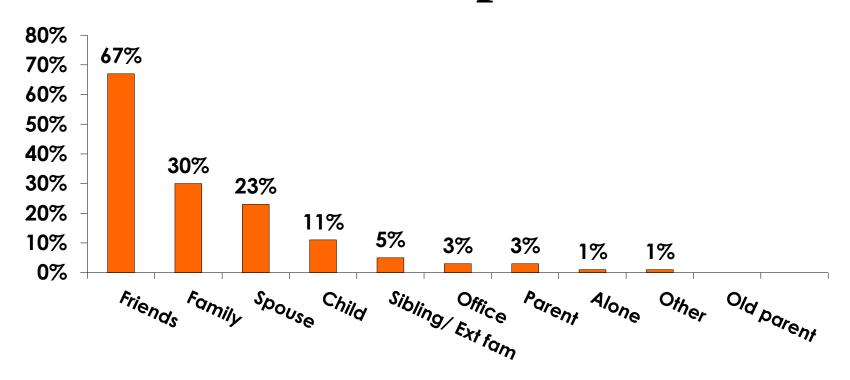


Personal Income by Gender & Age

			TOTAL	GEN	DER	AGE					
			-	Male	Female	18-24	25-34	35-49	50+		
Q26	<y2.0 million<="" td=""><td>Count</td><td>22</td><td>7</td><td>15</td><td>14</td><td>3</td><td>3</td><td>2</td></y2.0>	Count	22	7	15	14	3	3	2		
		Column N %	8%	4%	13%	12%	4%	6%	8%		
	Y2.0M-Y3.0M	Count	27	12	15	17	7	2	1		
		Column N %	10%	8%	13%	15%	9%	4%	4%		
	Y3.0M-Y4.0M	Count	29	12	17	10	17	1	1		
		Column N %	11%	8%	15%	9%	21%	2%	4%		
	Y4.0M-Y5.0M	Count	43	23	20	19	14	8	2		
		Column N %	16%	15%	17%	16%	18%	15%	8%		
	Y5.0M-Y7.0M	Count	63	42	21	20	25	10	7		
		Column N %	23%	27%	18%	17%	31%	19%	28%		
	Y7.0M-Y10.0M	Count	39	25	14	13	9	13	4		
		Column N %	14%	16%	12%	11%	11%	25%	16%		
	Y10.0M+	Count	46	34	12	18	5	15	8		
		Column N %	17%	22%	10%	16%	6%	29%	32%		
	No Income	Count	5	2	3	5					
		Column N %	2%	1%	3%	4%					
	Total	Count	274	157	117	116	80	52	25		



Travel Companions

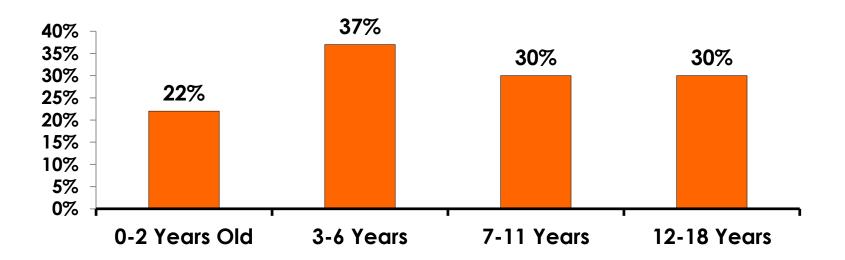




Number of Children Travel Party

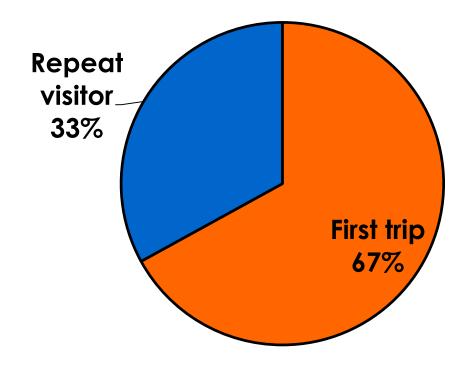
N=40 total respondents traveling with children.

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



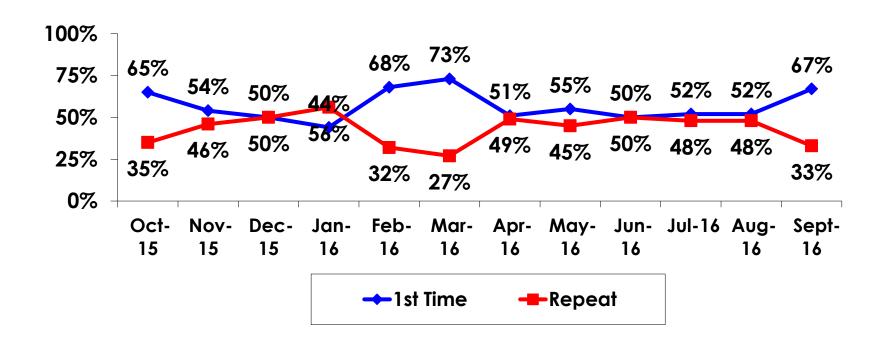


Prior Trips to Guam





PRIOR TRIPS TO GUAM





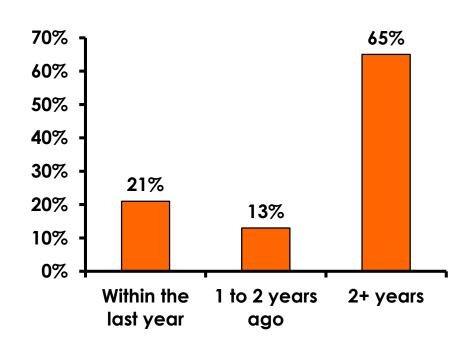
Trips to Guam by Age & Gender

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

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



Repeat Visitors Last Trip n = 112

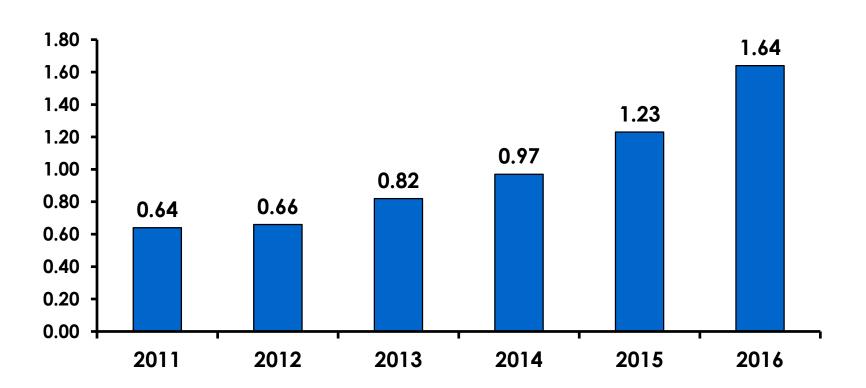


 The average repeat visitor has been to Guam 3.16 times.



Average Number Overnight Trips

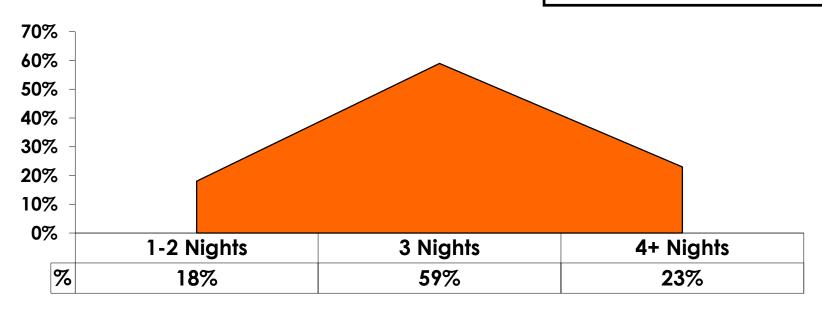
(2011-2016) (2 nights or more)





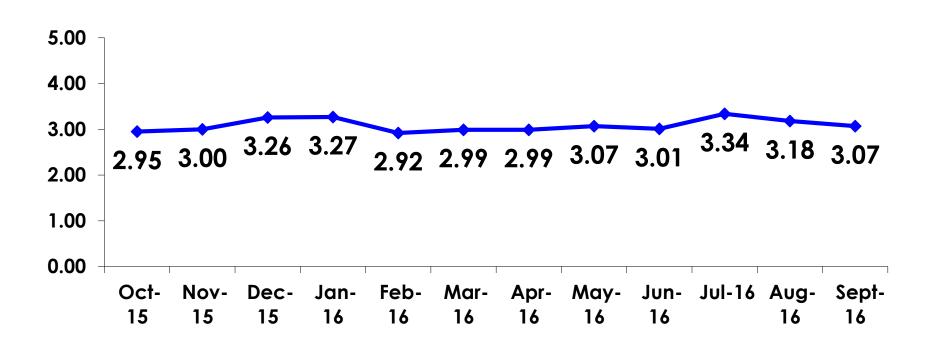
Length of Stay

Mean = 3.07 Days Median = 3.0 Days





AVG LENGTH OF STAY





Occupation by Income

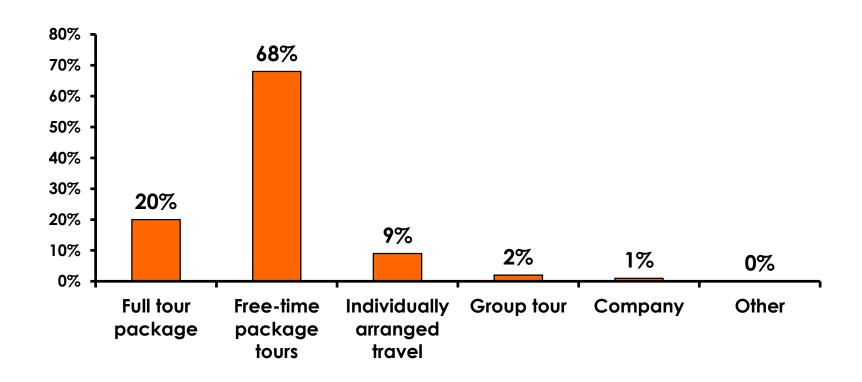
			TOTAL				Q26				
			-	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q25	Student		36%	27%	22%	10%	30%	29%	26%	33%	100%
	Engineer		15%		15%	28%	28%	22%	21%	4%	
	Office worker non-mgr		12%	23%	15%	17%	12%	11%	8%	7%	
	Salesperson		11%	9%	15%	24%	12%	14%	15%	4%	
	Self-employed		6%	5%	4%			13%	5%	17%	
	Manager		4%		4%		2%	3%	8%	13%	
	Professional/ Specialist		4%	9%	7%	3%	5%	2%	3%	7%	
	Skilled worker		3%	5%	4%	3%	5%		5%	2%	
	Homemaker		2%	14%			2%	2%	3%	4%	
	Freeter		2%	9%	4%					2%	
	Govt- office worker non- mgr		2%			7%		2%	3%	2%	
	Other		1%		7%		5%				
	Govt- Manager		1%						3%	4%	
	Executive (30+ employees)		1%			3%			3%		
	Retired		1%			3%		2%			
	Unemployed		0%		4%						
	Govt- Executive		0%					2%			
	Total	Count	342	22	27	29	43	63	39	46	5



SECTION 2 TRAVEL PLANNING



Travel Planning - Overall





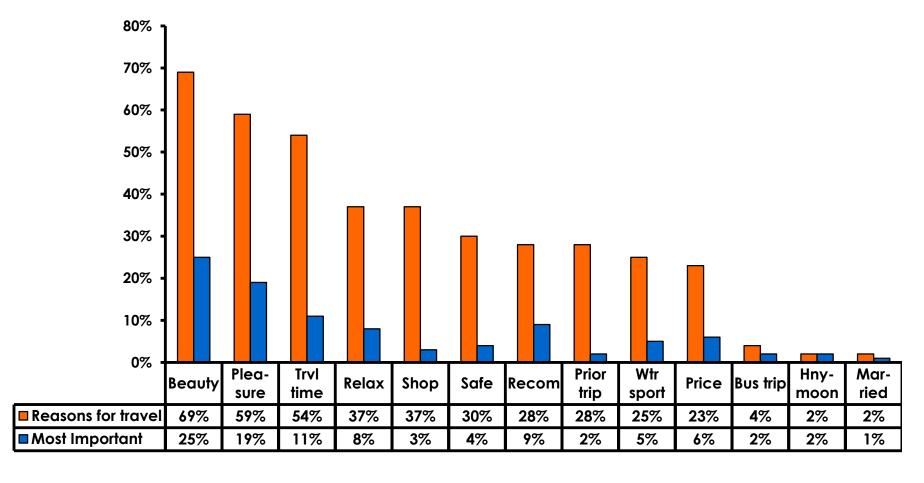
Accommodation by Income

Average length of stay: 3.07 days

			TOTAL	Q26							
			-	<y2.0 million<="" 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
Q9	Guam Plaza Hotel		19%	23%	22%	34%	14%	16%	26%	2%	20%
	Hilton Guam Resort		7%	5%	7%	10%	14%	5%	8%	4%	
	PIC Club		7%	5%	4%	7%	7%	10%	5%	9%	
	Royal Orchid Guam		7%	9%		10%	5%	11%	3%	9%	20%
	Fiesta Resort Guam		6%		11%		7%	5%	5%	9%	20%
	Grand Plaza Hotel		6%	14%	11%	7%	5%	3%		2%	
	Holiday Resort Guam		6%	5%	7%	7%	5%	6%	8%	9%	
	Guam Reef & Olive Spa		5%	5%	4%	10%	7%	8%	5%	2%	
	Outrigger Guam Resort		5%	5%	7%		2%	8%	5%	7%	
	Hotel Nikko Guam		5%	14%		3%	5%	6%	5%	9%	
	Onward Beach Resort		4%		7%		5%	2%	5%	4%	
	Pacific Bay Hotel		4%	9%	15%	3%		2%	3%		
	Verona Resort & Spa		3%				2%	2%	3%	9%	
	Oceanview Hotel		3%			3%	5%	2%	3%	9%	
	Aqua Suites		3%	5%			2%	2%			40%
	Westin Resort Guam		3%	5%	4%	3%	5%	2%	3%	2%	
	Bayview Hotel		2%				5%	3%		4%	
	Hyatt Regency Guam		2%				2%	3%	8%	2%	
	Dusit Thani Guam		1%				2%			7%	
	Leo Palace Resort		1%				2%	3%	3%		
	Lotte Hotel Guam		1%					2%	3%		
	Pacific Star Resort & Spa		1%					2%		2%	
	Sheraton Laguna Guam		0%						3%		
	Total	Count	351	22	27	29	43	63	39	46	5



Travel Motivation - Top Responses





Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Short travel distance, and
- Pleasure
 were the primary reasons for visiting during this period.



Motivation by Age & Gender

			TOTAL		AG	E		GENDER		
			-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty		69%	74%	70%	65%	35%	61%	76%	
	Pleasure		59%	64%	58%	53%	46%	54%	65%	
	Short travel time		54%	50%	55%	72%	50%	57%	52%	
	Relax		37%	33%	43%	40%	42%	40%	34%	
	Shopping		37%	44%	32%	28%	27%	28%	45%	
	Safe		30%	26%	36%	39%	19%	28%	32%	
	Recomm- friend/family/trvl agnt		28%	37%	25%	12%	19%	26%	31%	
	Previous trip		28%	15%	32%	49%	62%	34%	22%	
	Water sports		25%	31%	22%	19%	4%	24%	25%	
	Price		23%	21%	31%	21%	19%	23%	23%	
	Company/ Business Trip		4%	2%	7%	4%	8%	3%	4%	
	Scuba		4%	4%	6%			4%	3%	
	Honeymoon		2%	2%	3%	2%		4%	1%	
	Married/ Attn wedding		2%	1%		5%	8%	3%	1%	
	Visit friends/ Relatives		2%	3%	1%	2%		2%	2%	
	Organized sports		1%	2%		4%		3%		
	Golf		1%		2%	5%		2%	1%	
	Other		1%	1%	1%	2%	4%	2%	1%	
	Career Cert/ Testing		1%	1%	1%			2%		
	Company Sponsored		0%				4%	1%		
	Total	Count	351	179	88	57	26	179	172	



Motivation by Income

			TOTAL		Q26						
			-	<y2.0 million<="" 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		69%	77%	70%	72%	79%	67%	69%	57%	100%
	Pleasure		59%	73%	63%	66%	58%	51%	54%	50%	100%
	Short travel time		54%	50%	59%	52%	67%	49%	56%	63%	60%
	Relax		37%	45%	41%	31%	49%	44%	33%	39%	60%
	Shopping		37%	45%	41%	34%	44%	25%	44%	35%	80%
	Safe		30%	41%	33%	48%	30%	30%	23%	35%	60%
	Recomm- friend/family/trvl agnt		28%	27%	37%	21%	21%	32%	28%	20%	40%
	Previous trip		28%	18%	37%	17%	23%	37%	31%	46%	
	Water sports		25%	27%	19%	24%	23%	21%	26%	26%	80%
	Price		23%	23%	19%	34%	30%	16%	26%	24%	60%
	Company/ Business Trip		4%		4%	7%	2%	3%	5%	4%	
	Scuba		4%	5%	7%	7%	2%	2%	3%	4%	20%
	Honeymoon		2%	5%	7%		2%	3%		2%	
	Married/ Attn wedding		2%	5%			5%	2%	3%	4%	
	Visit friends/ Relatives		2%	9%	7%	3%					
	Organized sports		1%				2%			4%	20%
	Golf		1%			3%			3%	2%	
	Other		1%	5%	7%					2%	
	Career Cert/ Testing		1%		4%			3%			
	Company Sponsored		0%								
	Total	Count	351	22	27	29	43	63	39	46	5



SECTION 3 EXPENDITURES

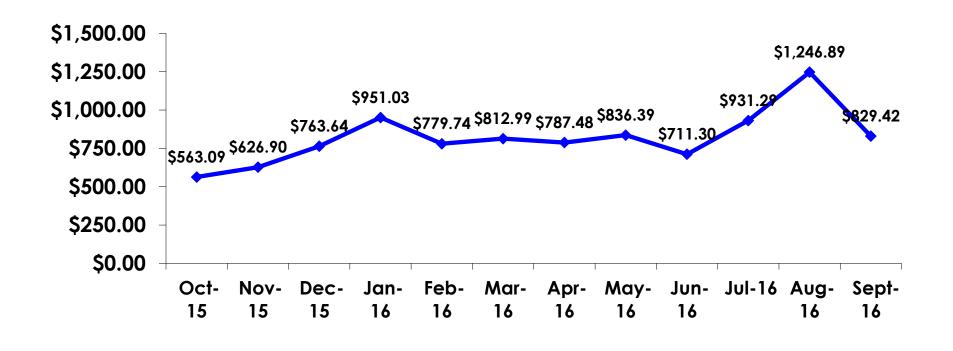


Prepaid Expenditures ¥102.14/US\$1

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



PREPAID EXPENDITURES Per Person



YTD=\$820.05



Breakdown of Prepaid Expenditures ¥102.14=\$1

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

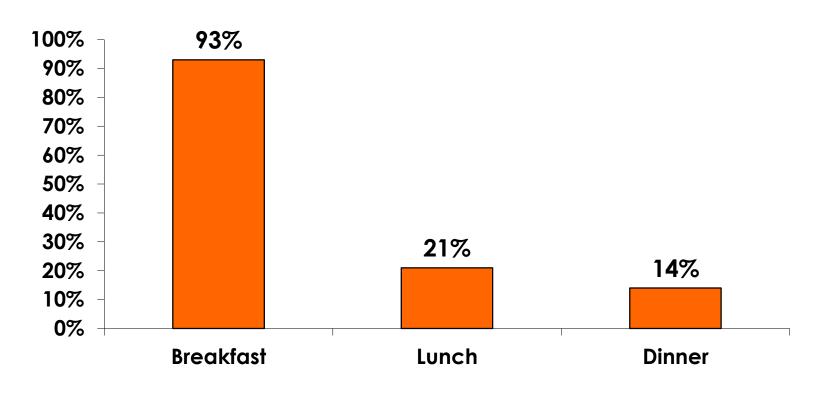
	MEAN \$
Air & Accommodation package only	\$1,282.09
Air & Accommodation w/ daily meal package	\$1,881.87
Air only	\$1,153.65
Accommodation only	\$888.00
Accommodation w/ daily meal only	\$986.04
Food & Beverages in Hotel	\$9.79
Ground transportation – Japan	\$67.98
Ground transportation – Guam	\$28.39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

32



PREPAID MEAL BREAKDOWN

Air/Accommodations with Daily Meal Pkg. n=29

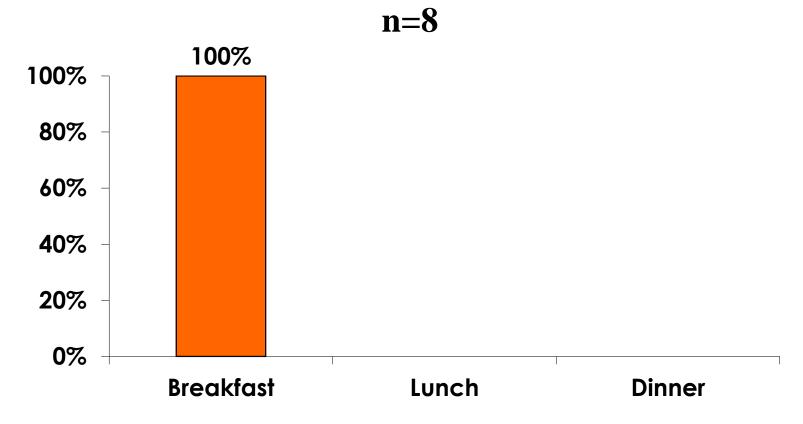


Mean=\$1,881.87 per travel party



PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

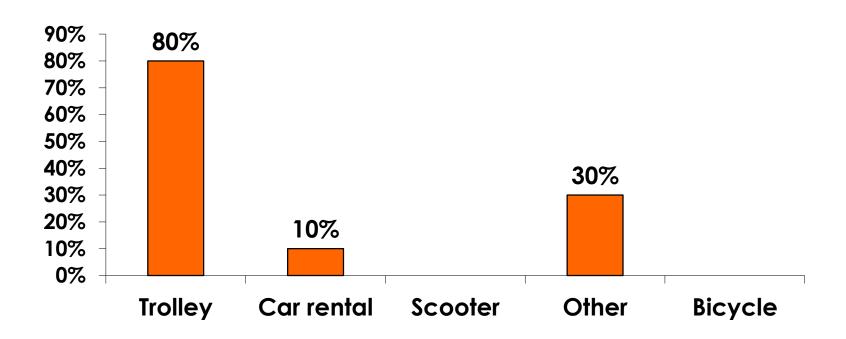


Mean=\$986.04 per travel party



PREPAID GROUND TRANSPORTATION

n=10



Mean=\$28.39 per travel party

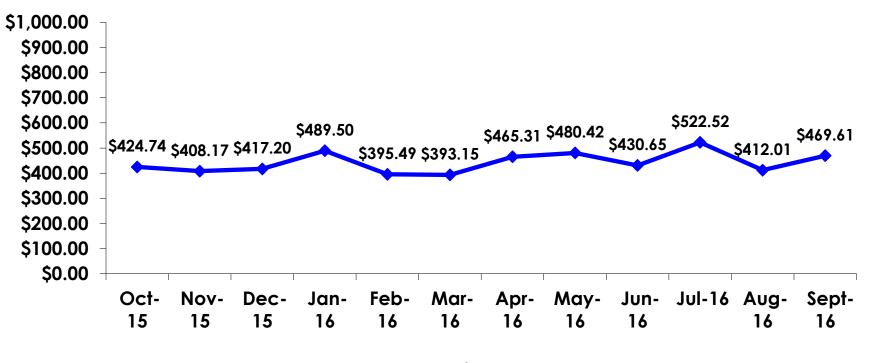


On-Island Expenditures

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



ON-ISLAND EXPENDITURES Per Person



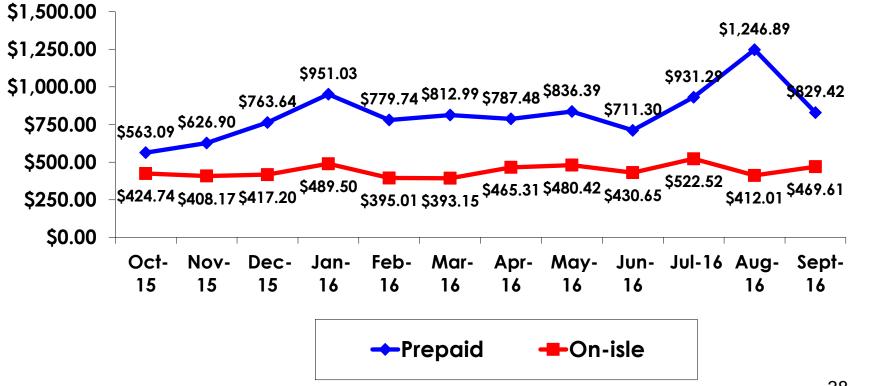
YTD = \$442.27



PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$820.05 On-Isle YT

On-Isle YTD = \$442.27





Total On-Island Expenditure by Gender & Age

	GEN	GENDER GENDER											
					Male					Female			
					AG	E			AGE				
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+	
PER PERSON	Mean	\$469.61	\$486.15	\$452.40	\$564.82	\$439.61	\$431.33	\$454.14	\$417.26	\$479.88	\$721.50	\$520.83	
	Median	\$355	\$400	\$333	\$450	\$375	\$333	\$300	\$345	\$300	\$400	\$325	
	Minimum	\$0	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$30	\$100	\$150	
	Maximum	\$4,000	\$4,000	\$2,500	\$4,000	\$1,700	\$1,475	\$2,500	\$2,500	\$2,013	\$2,500	\$1,600	



On-Island Expenditure Categories by Gender & Age

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

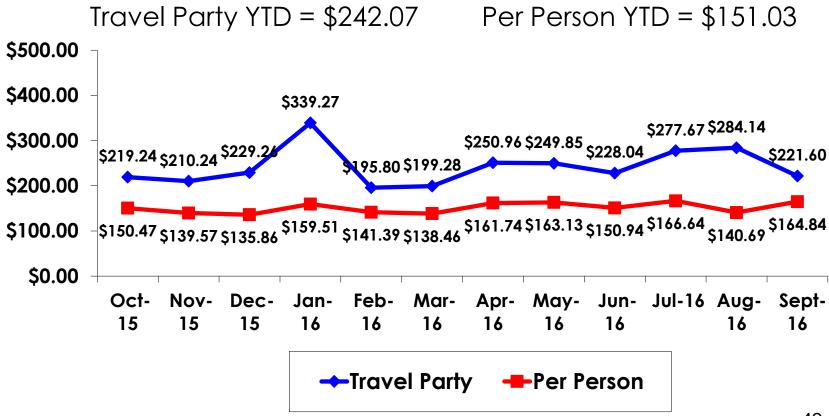


On-Island Expenditures First Timers & Repeaters

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



ON-ISLE EXPENDITURES – Per Day



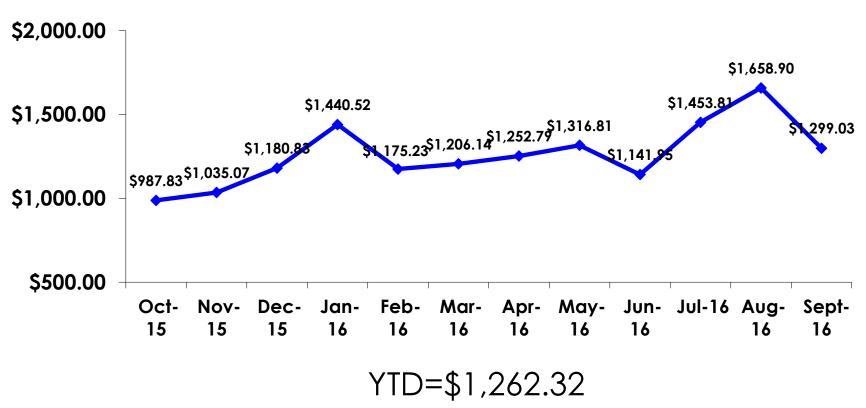


Total Expenditures Per Person (Prepaid & On-Island)

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



TOTAL EXPENDITURES Per Person



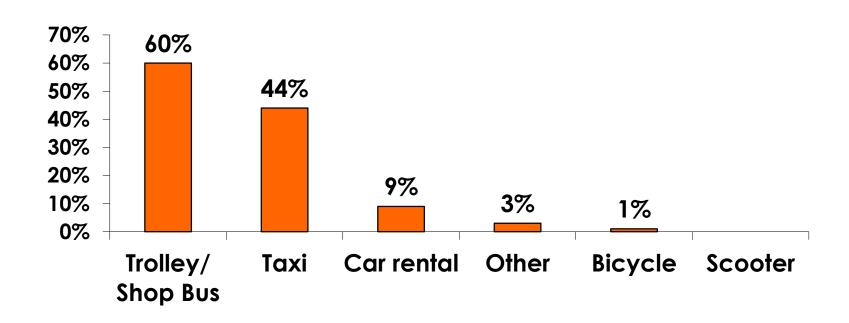


Breakdown of On-Island Expenditures

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



Local Transportation _{n=101}



Mean=\$15.65 per travel party



Guam Airport Expenditures

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



Breakdown of Airport Expenditures

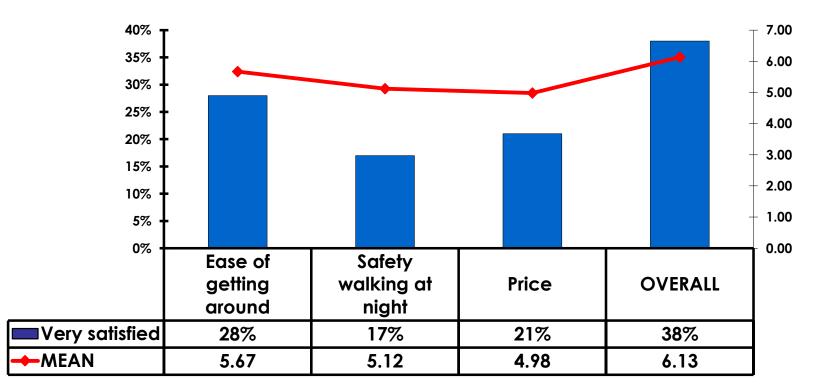
	MEAN \$
Food & Beverages	\$9.56
Gifts/Souvenirs Self	\$9.63
Gifts/Souvenirs Others	\$10.81
Total	\$30.00



SECTION 4 VISITOR SATISFACTION

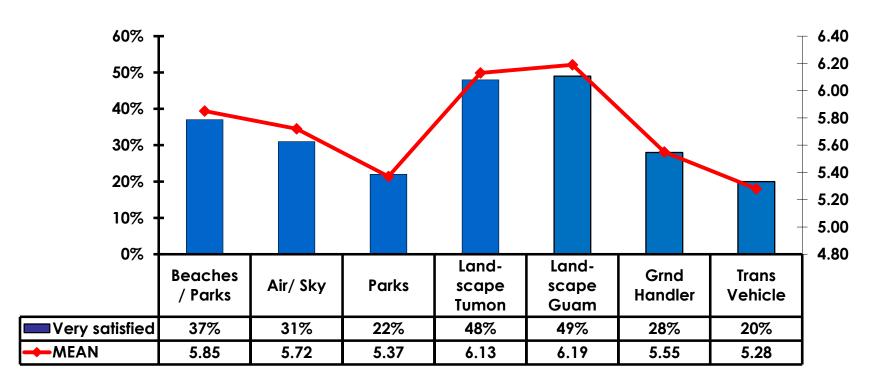


Satisfaction Scores Overall



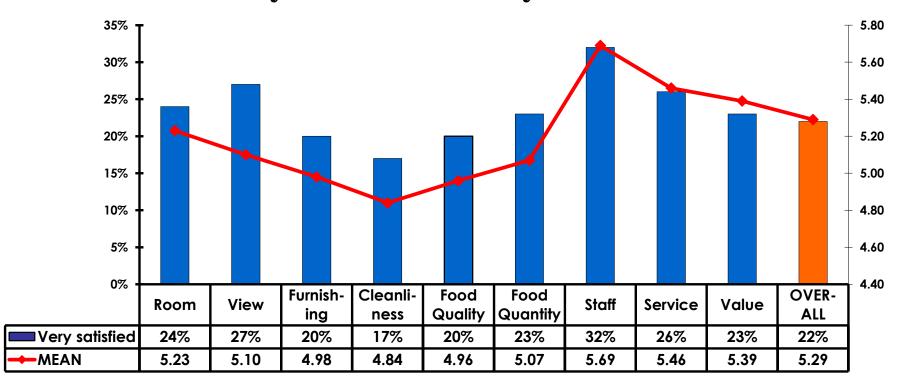


Satisfaction Quality/ Cleanliness



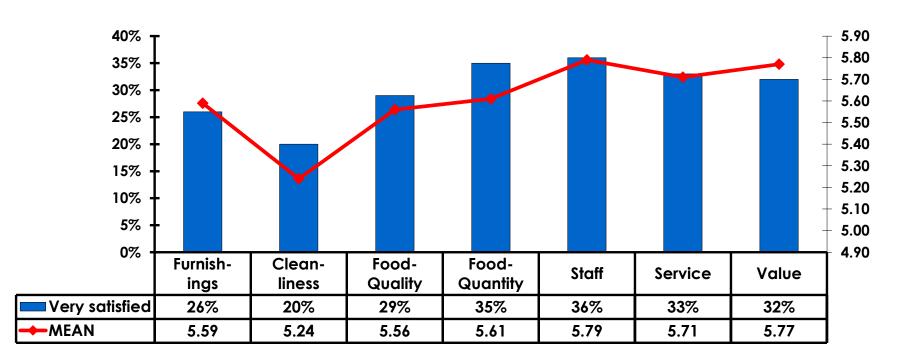


Quality of Accommodations



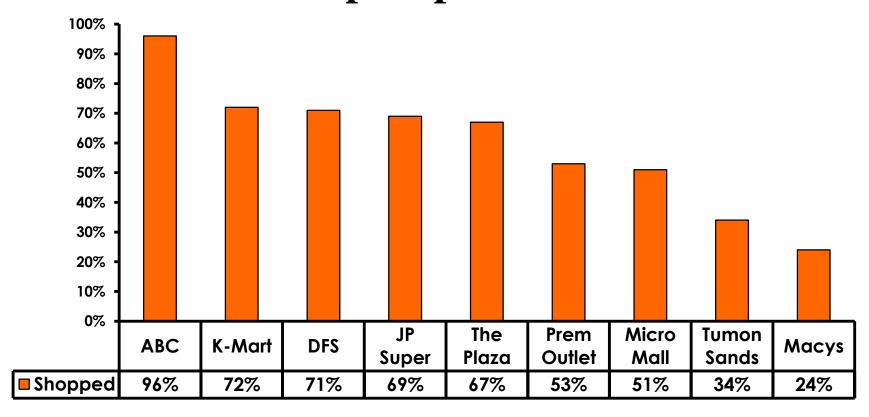


Quality of Dining Experience





Visits to Shopping Centers/Malls on Guam Top responses





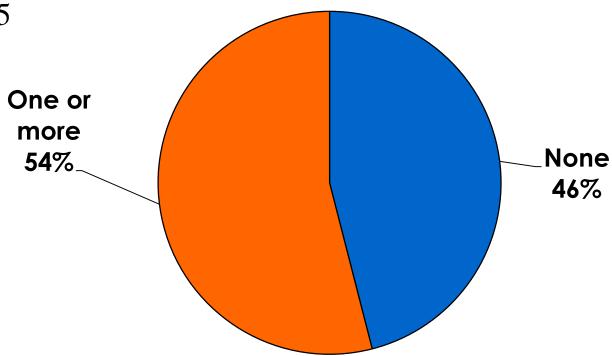
Satisfaction with Shopping

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



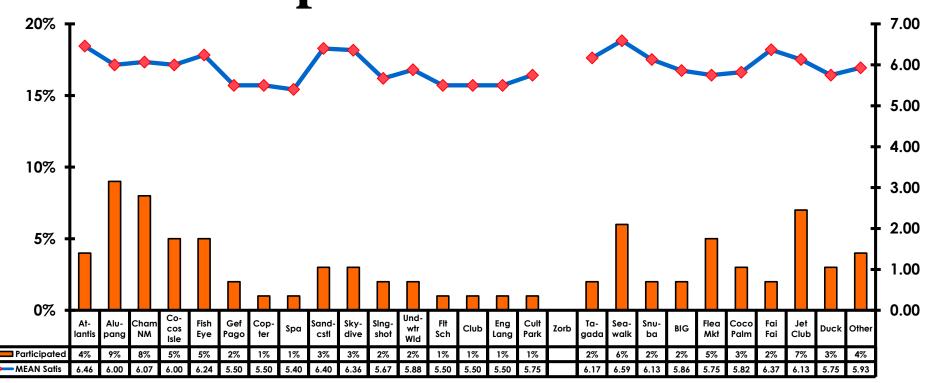
Optional Tour Participation

• Average number of tours participated in is .85





Optional Tours Participation & Satisfaction





Day Tours Satisfaction

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

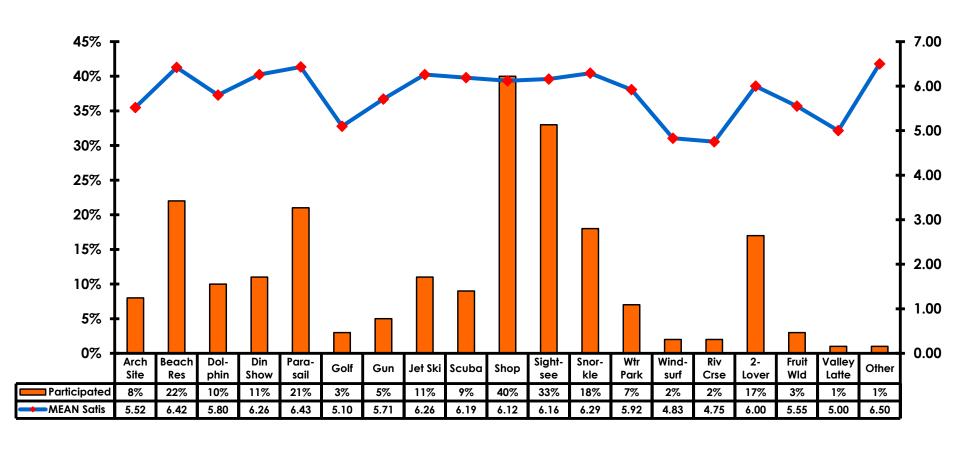


Night Tours Satisfaction

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

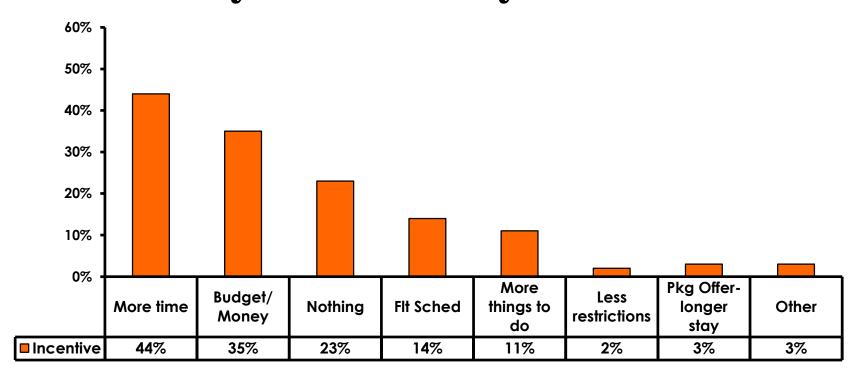


Satisfaction with Other Activities



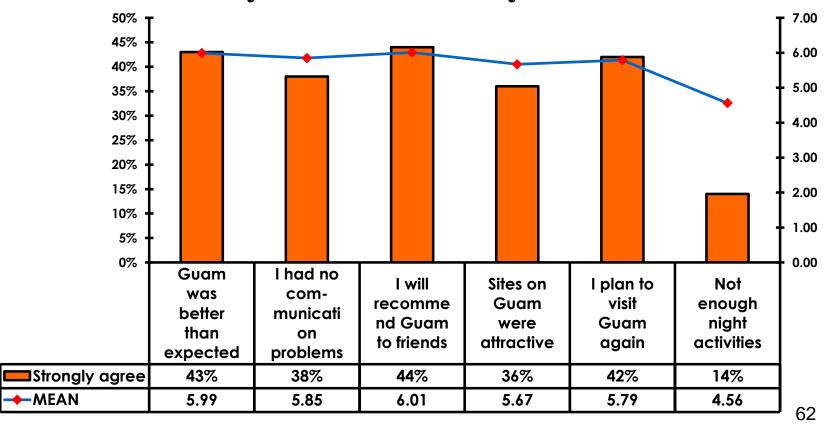


What would it take to make you want to stay an extra day in Guam?



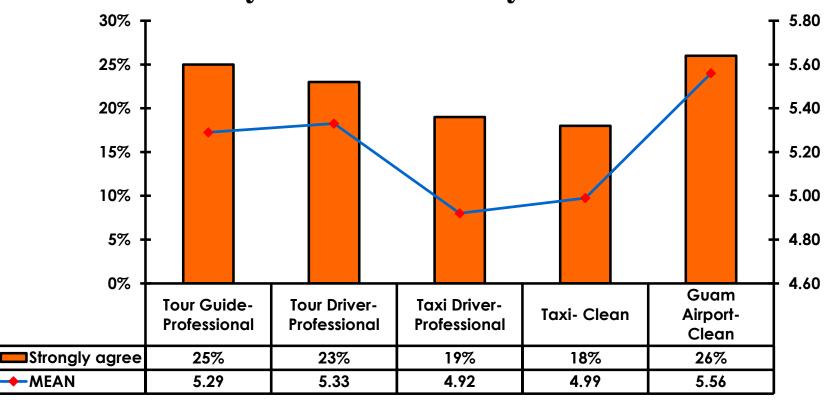


On-Island Perceptions





On-Island Perceptions

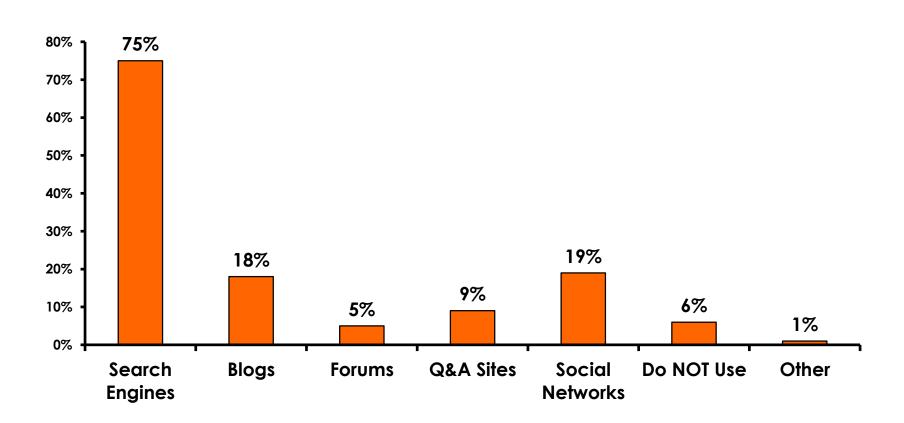




SECTION 5 PROMOTIONS

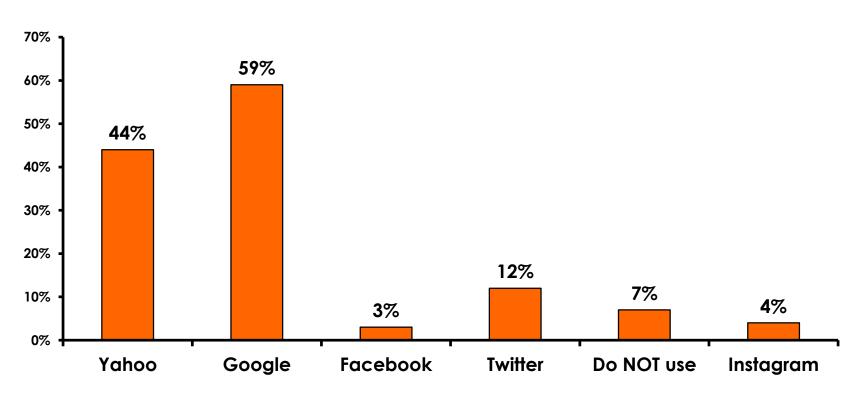


Internet- Guam Sources of Info



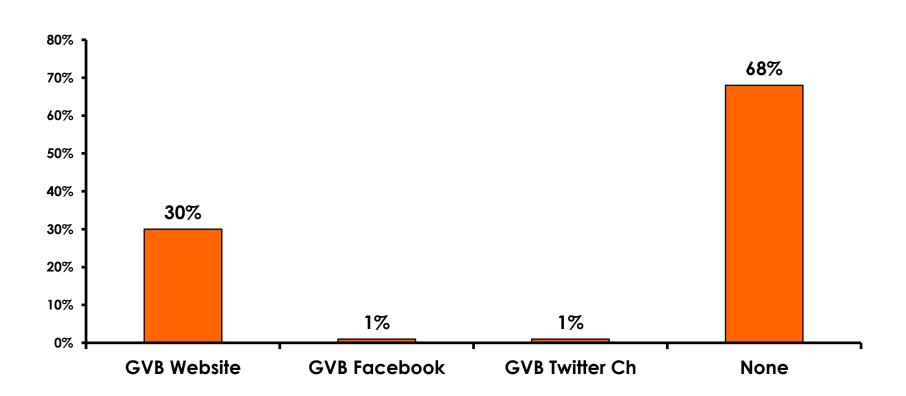


Internet- Things To Do Sources of Info



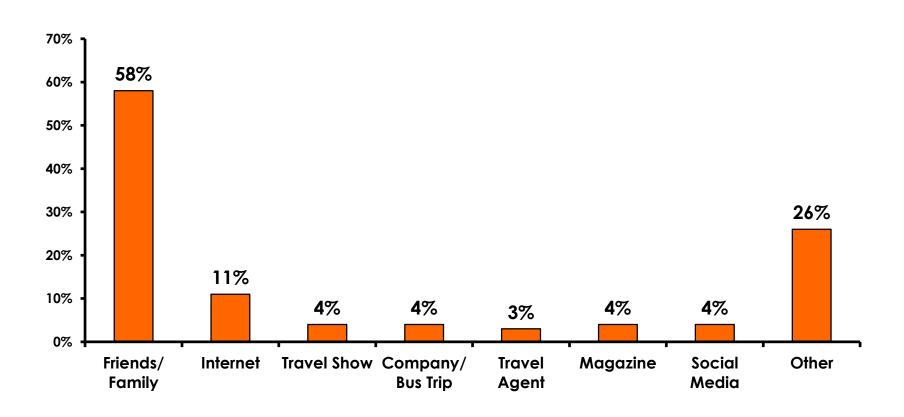


Internet- GVB Sources



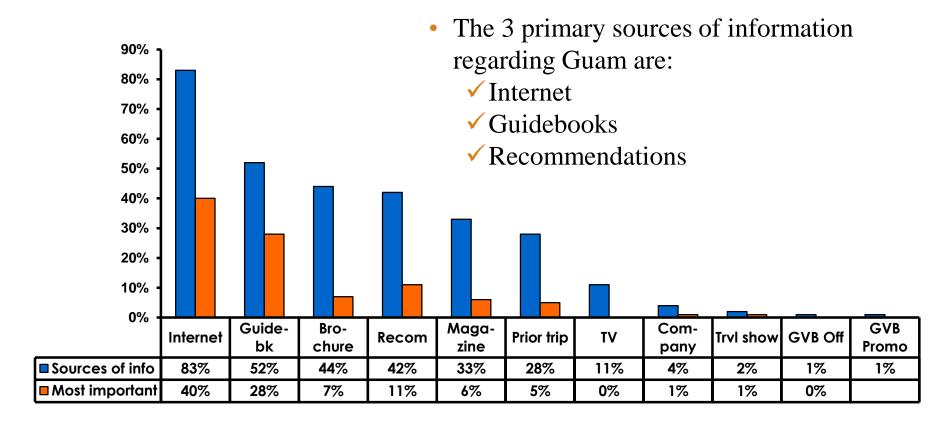


Travel Motivation-Info Sources



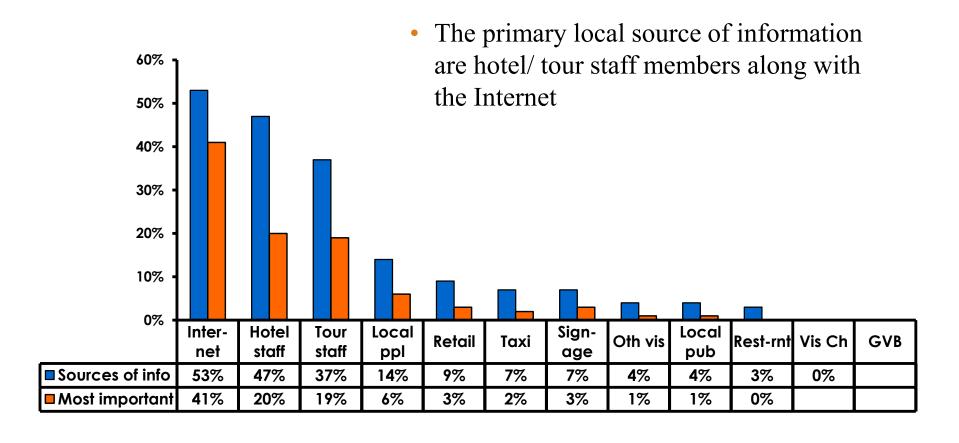


Sources of Information Pre-arrival



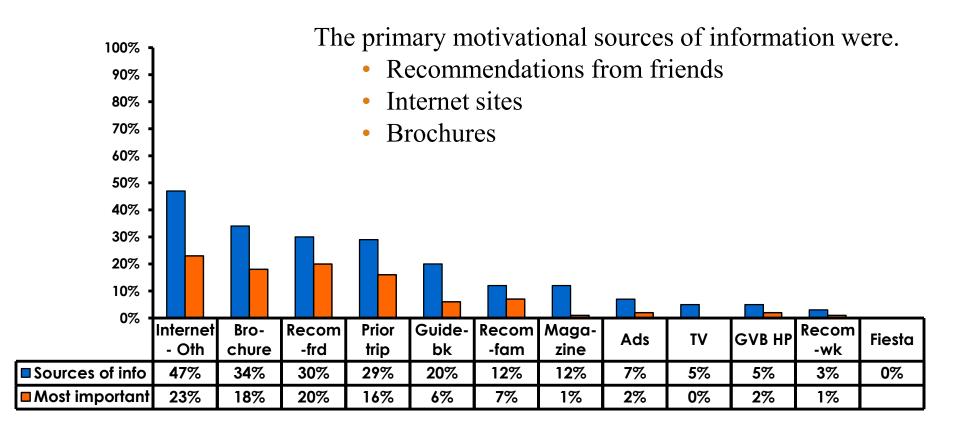


Sources of Information Post-arrival





Sources of Information - Motivation

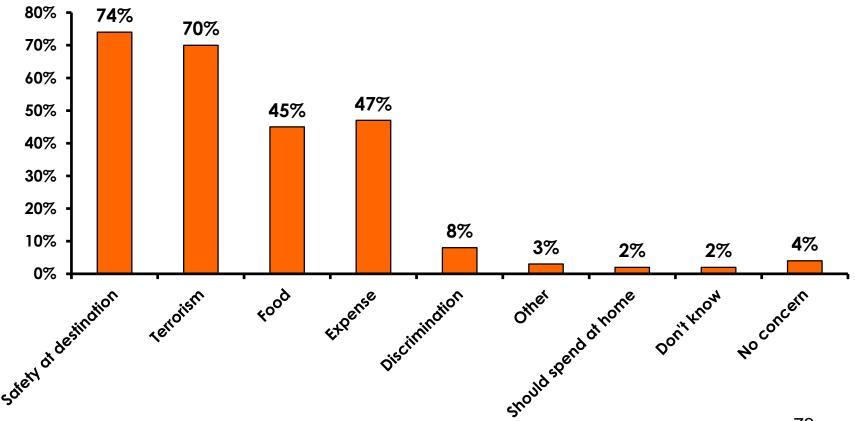




SECTION 6 OTHER ISSUES



Concerns about travel outside of Japan - Overall



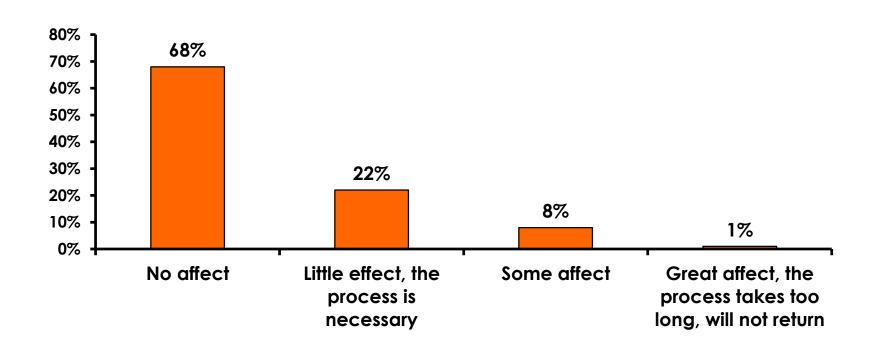


Concerns about travel outside of Japan - By Age & Income

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



Security Screening/Immigration Process at Guam International Airport





Airport Screening

7pt Rating Scale 7=Strongly Agree/ 1=Strongly Disagree

