Guam Visitors Bureau
Japan Visitor Tracker Exit Profile
FY2017 DATA AGGREGATION

Prepared by: Anthology Research

VISIT
GUAM
2017
YEAR of LOVE

[ANTHOLOGY]
AnthologyGroup.com

GUAM
VISITORS
BUREAU
SETBISION BISITAN GUÅHAN

GUAM

Background and Methodology

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

- A total of **4,213** departing Japan 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 **4,213** is +/- 1.51 percentage points with a 95% confidence level. That is, if all Japan 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 +/- 1.51 percentage points.

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Objectives

- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japan 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.

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Key Highlighted Segments

- **The specific objectives were:**

  - To determine the relative size and expenditure behavior of the following market segments:
    - Families (Q5)
    - Office Lady/ Salary Woman (Gender/ Q25 Office worker- non-managerial
    - Group Tour (Q6)
    - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)
    - Silver (QF Age 60+)
    - Wedding (Q5A)
    - Repeat Visitor (Q3)

  - To identify the most significant factors affecting overall visitor satisfaction.

  - To identify (for all Japan visitors) the most important determinants of on-island spending

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Key Highlighted Segments

	FY2017			
Family	45%			
Repeat	46%			
Office Lady	12%			
Wedding	5%			
Silver	3%			
Group	13%			
MICE	2%			

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SECTION 1
PROFILE OF RESPONDENTS

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Marital Status

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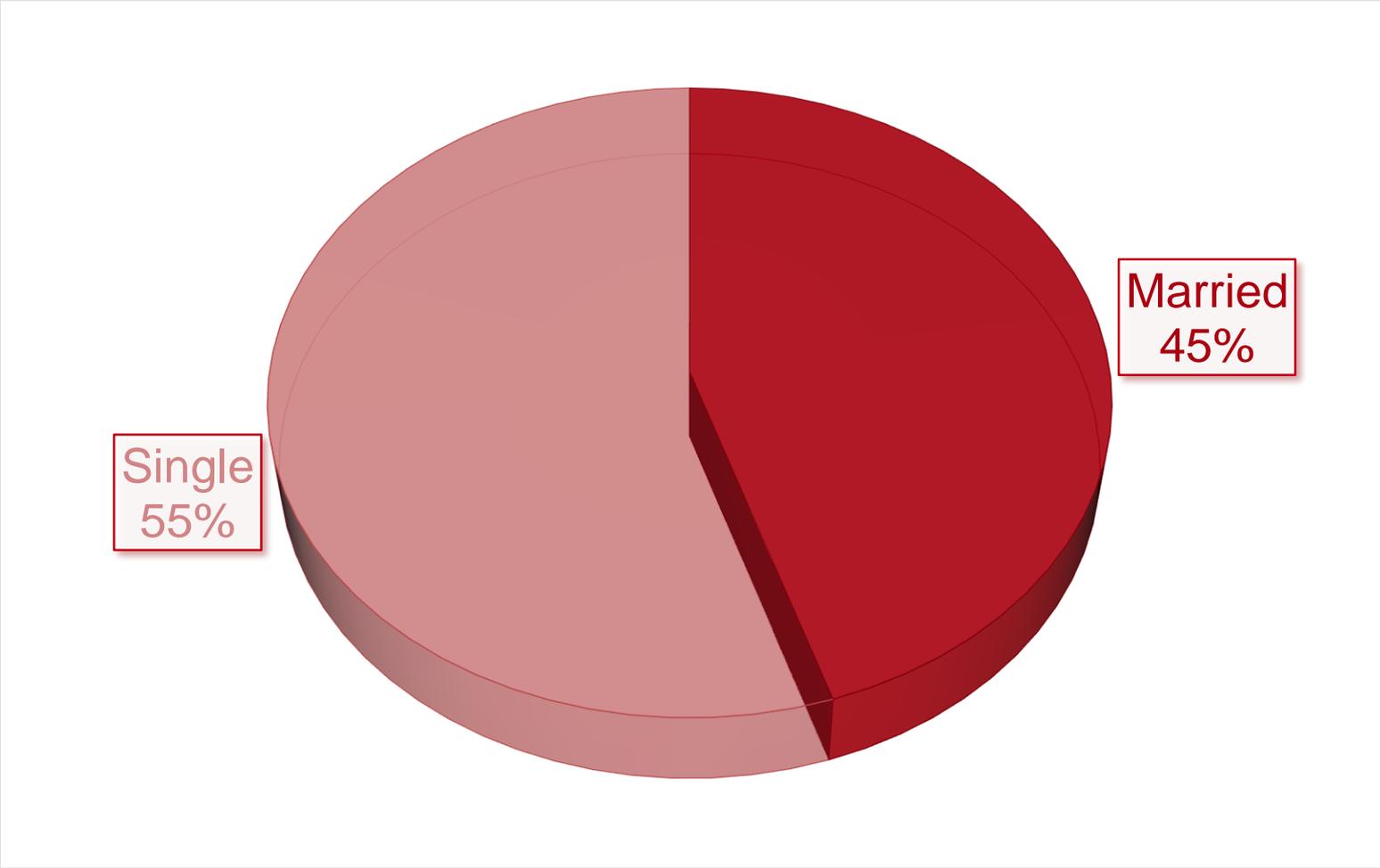
Marital status – Tracking
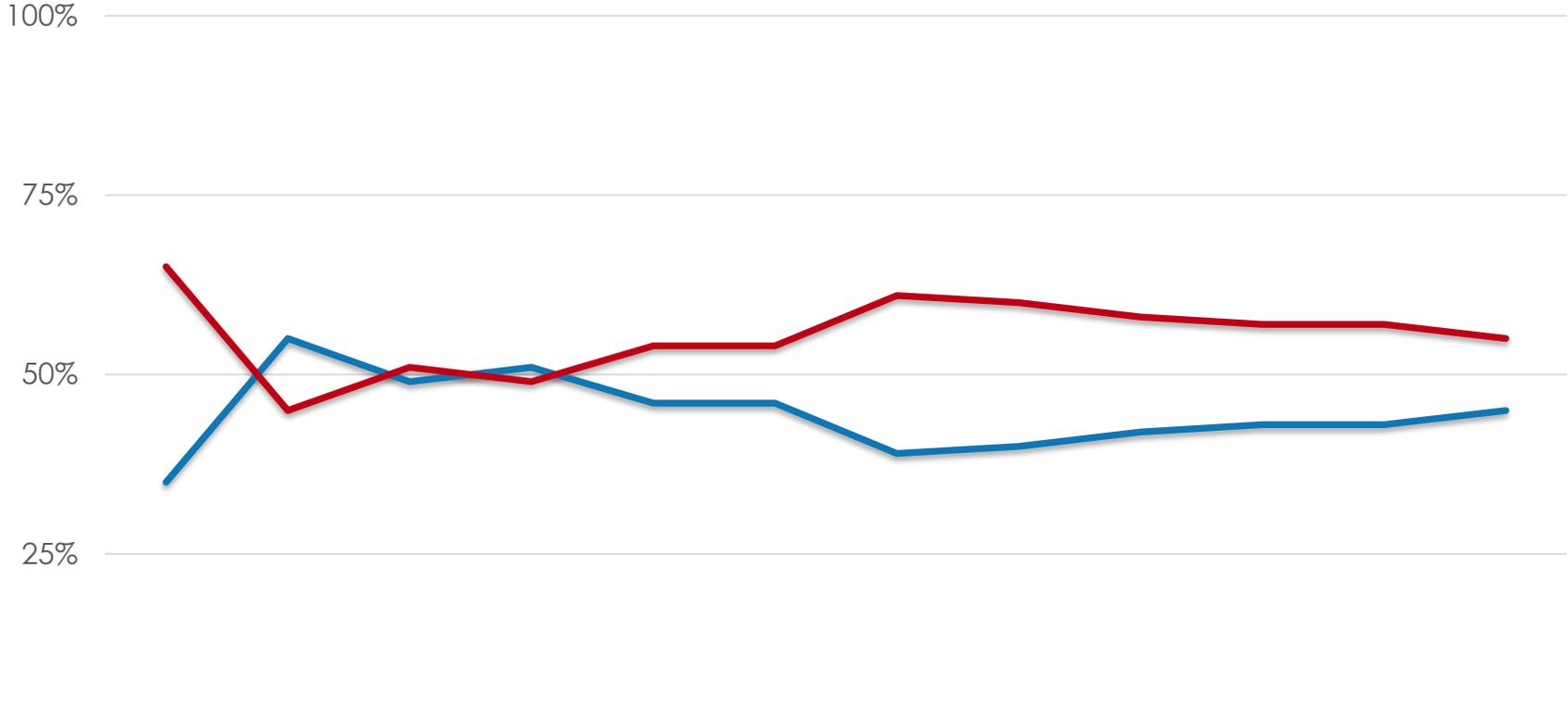
	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
Married	35%	55%	49%	51%	46%	46%	39%	40%	42%	43%	43%	45%
Single	65%	45%	51%	49%	54%	54%	61%	60%	58%	57%	57%	55%

Age

MEAN = 33.14
MEDIAN = 30

- 18-24: 29%
- 25-39: 43%
- 40-49: 18%
- 50-59: 7%
- 60+: 3%

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Age –Tracking

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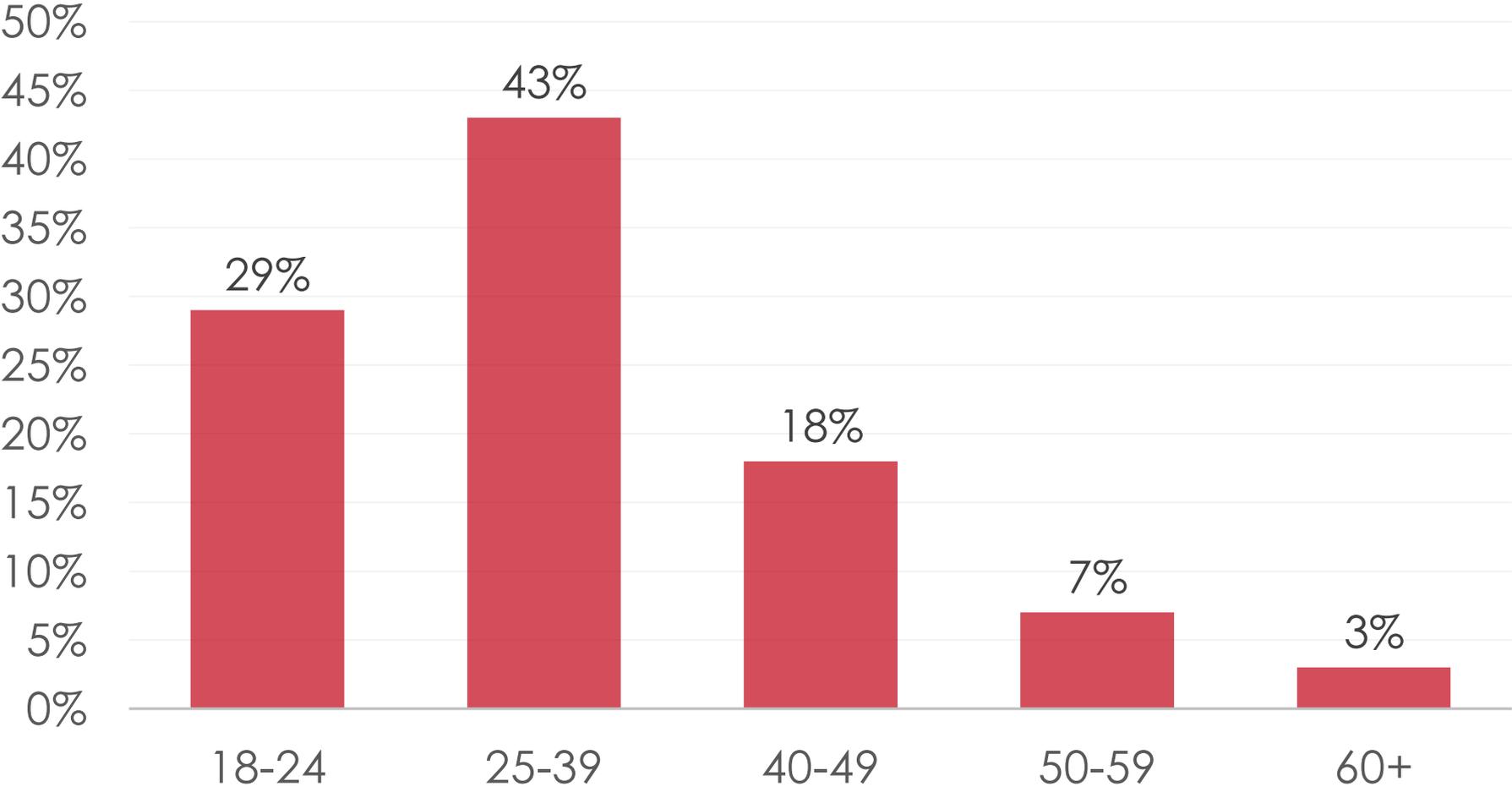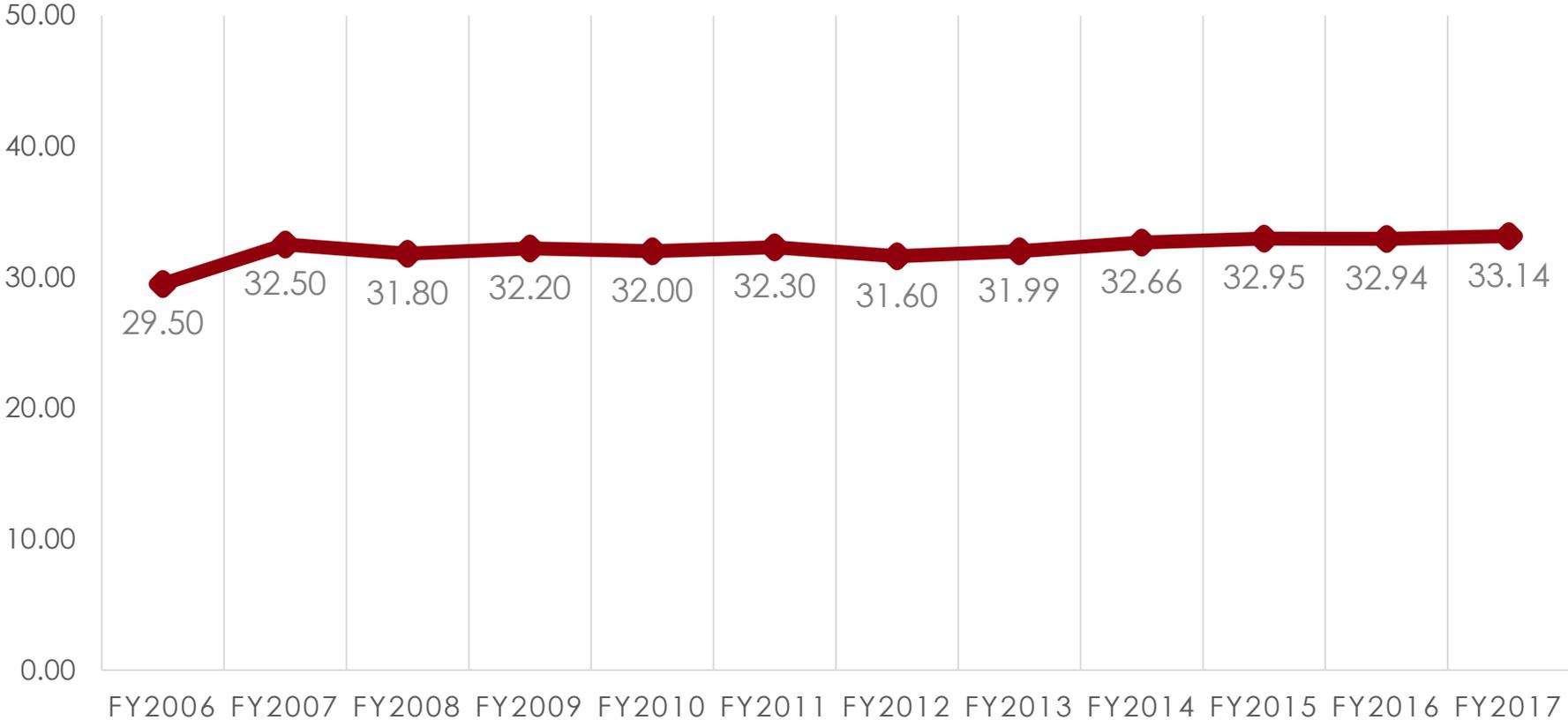
Annual Household Income

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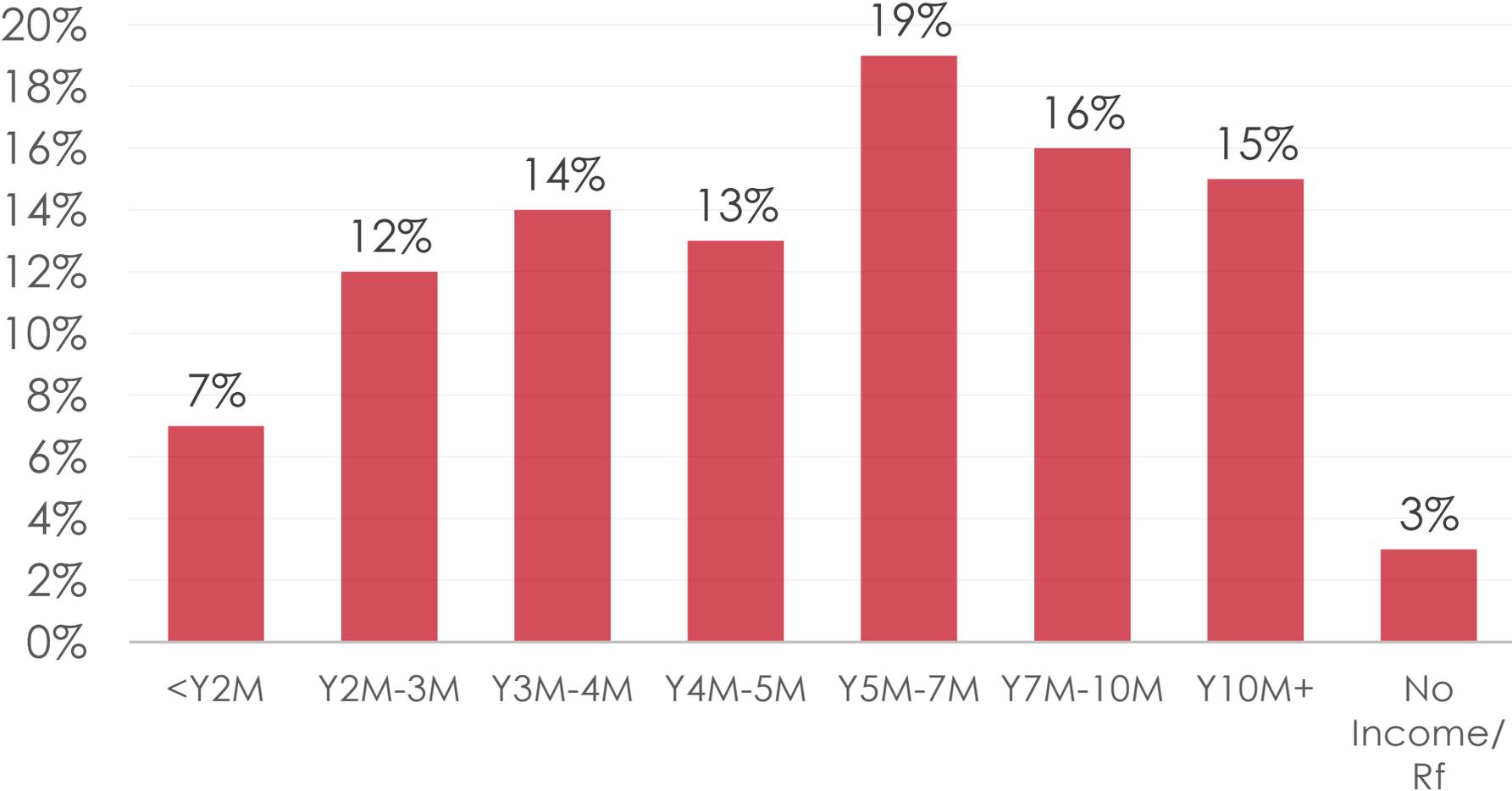
Annual Household Income - Tracking
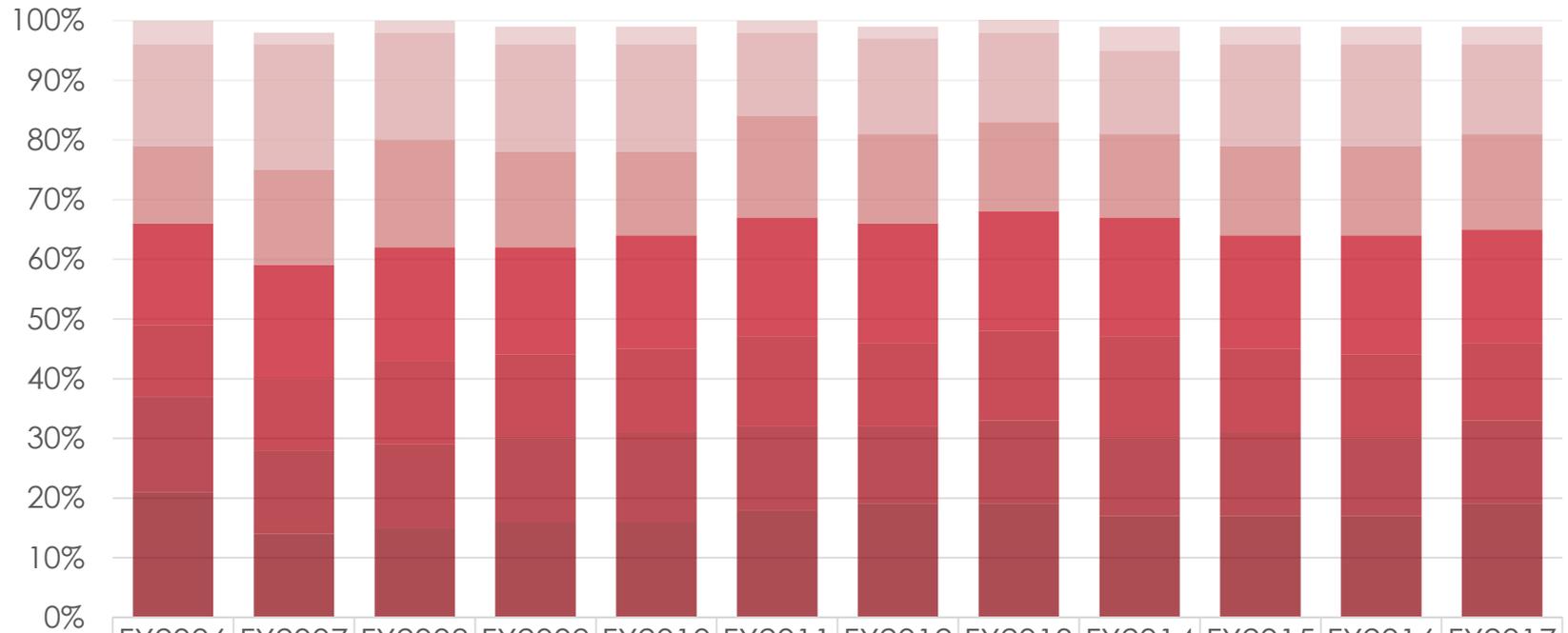
	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
Rf	4%	2%	2%	3%	3%	2%	2%	3%	4%	3%	3%	3%
Y10.0M+	17%	21%	18%	18%	18%	14%	16%	15%	14%	17%	17%	15%
Y7.0M-9.9M	13%	16%	18%	16%	14%	17%	15%	15%	14%	15%	15%	16%
Y5.0M-6.9M	17%	19%	19%	18%	19%	20%	20%	20%	20%	19%	20%	19%
Y4.0M-4.9M	12%	12%	14%	14%	14%	15%	14%	15%	17%	14%	14%	13%
Y3.0M-3.9M	16%	14%	14%	14%	15%	14%	13%	14%	13%	14%	13%	14%
<Y3.0M	21%	14%	15%	16%	16%	18%	19%	19%	17%	17%	17%	19%

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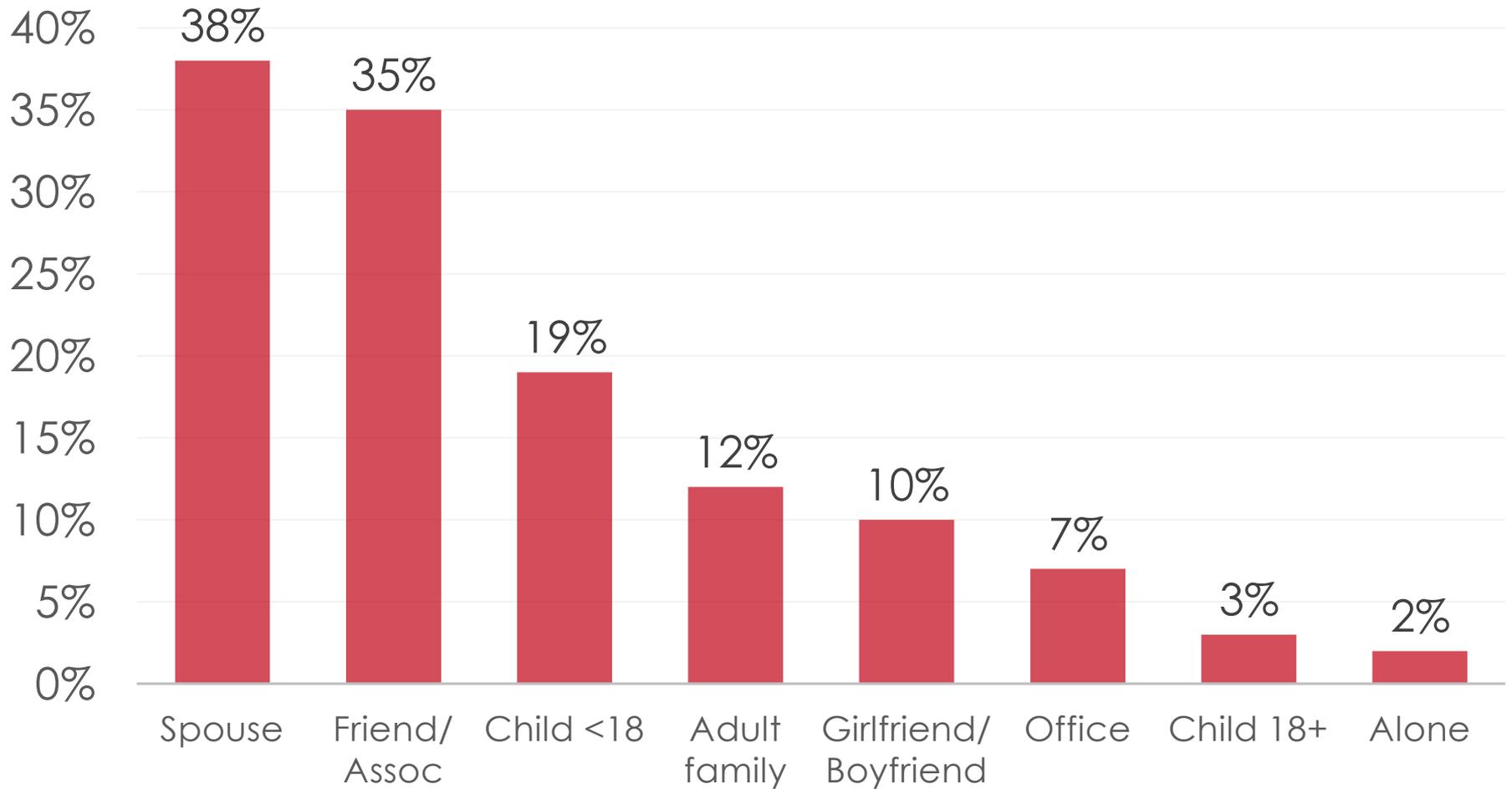
Travel Party

Travel Party

	FY2017			
Spouse	38%			
Friend/ Assoc	35%			
Child <18	19%			
Adult Family	12%			
Girlfriend/ Boyfriend	10%			
Office	7%			
Child 18+	3%			
Alone	2%			

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Travel Party - Children

19% TRAVELING WITH A CHILD

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Trips to Guam

Repeat 47%

First time 53%

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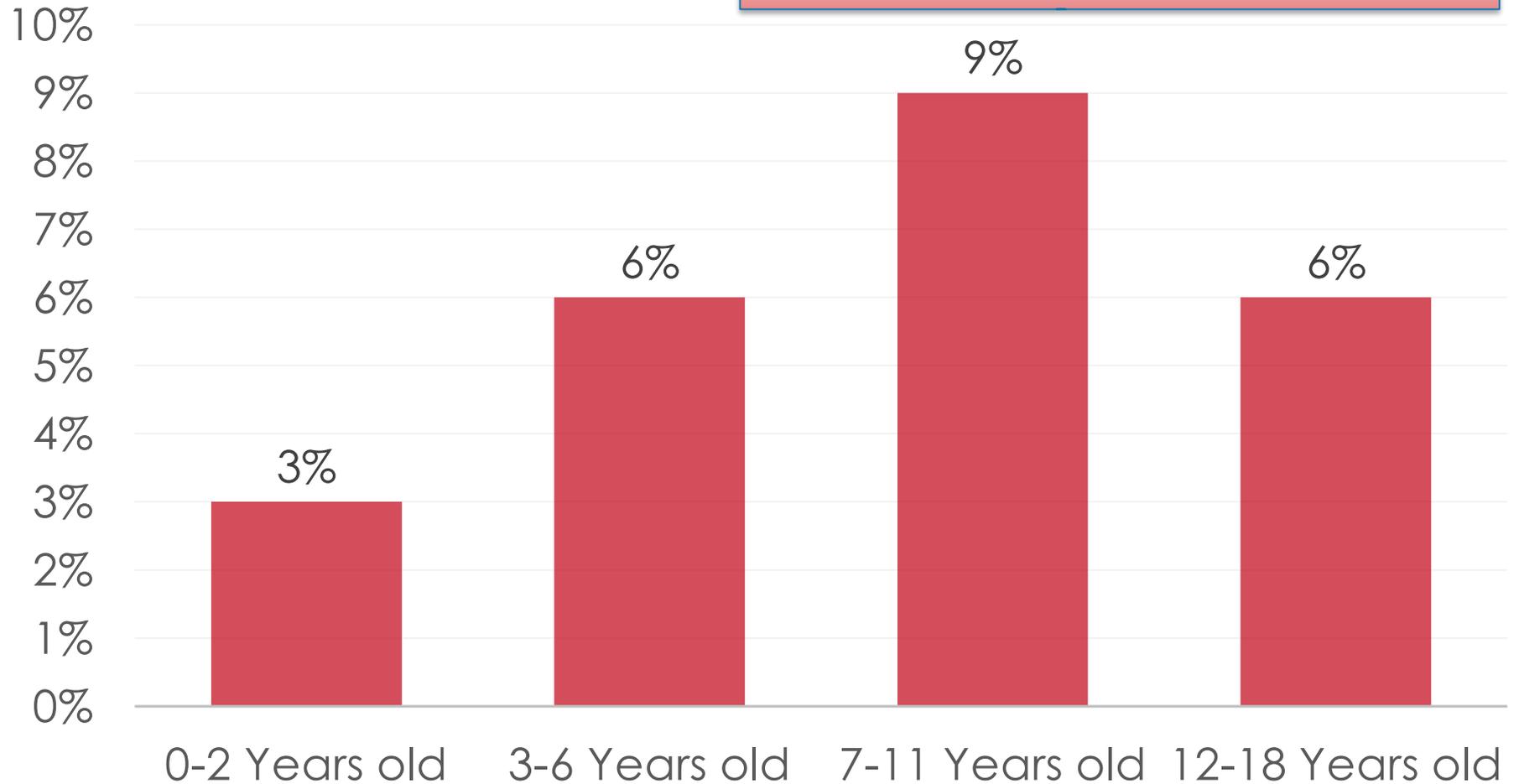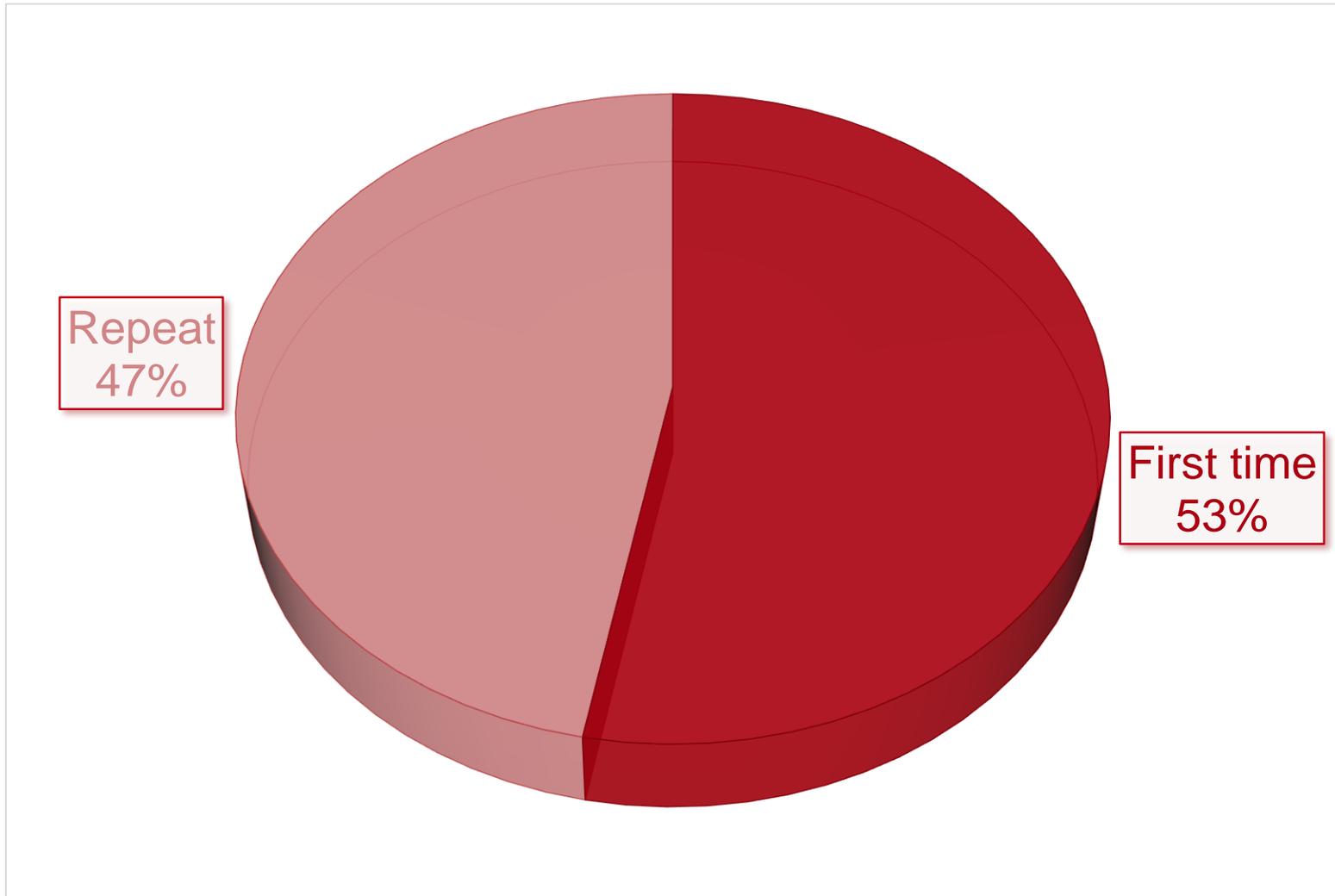
Trips to Guam – Tracking
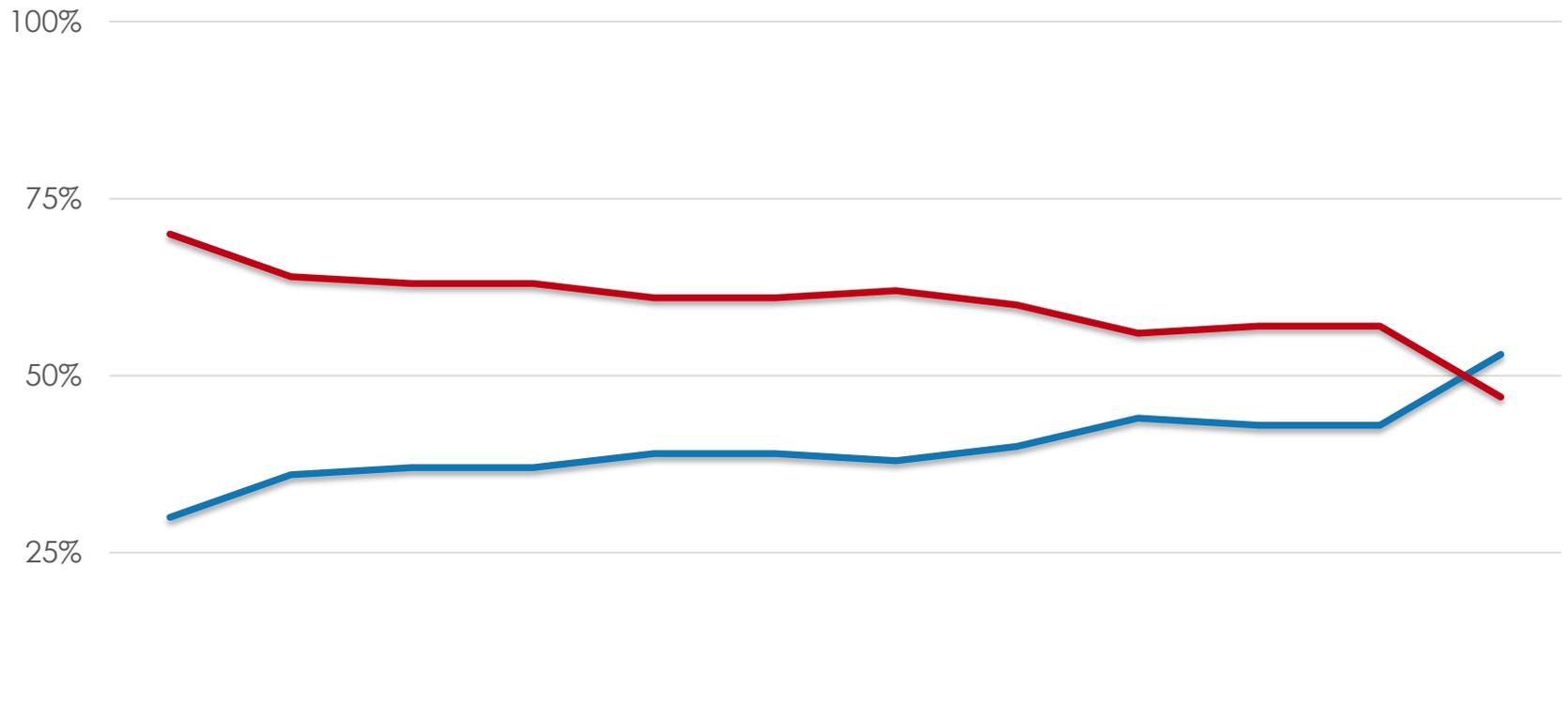
	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
Repeat	30%	36%	37%	37%	39%	39%	38%	40%	44%	43%	43%	53%
1st Time	70%	64%	63%	63%	61%	61%	62%	60%	56%	57%	57%	47%

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Length of Stay –Tracking

MEAN	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
	3.10	3.40	3.40	3.30	3.10	3.10	3.00	2.98	2.97	2.99	3.09	3.24

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Occupation – Top Responses (10%+)

Bar chart showing occupation top responses:
- Company: Non-Mgr — 18%
- Student — 18%
- Company: Engineer — 15%
- Company: Sales — 11%

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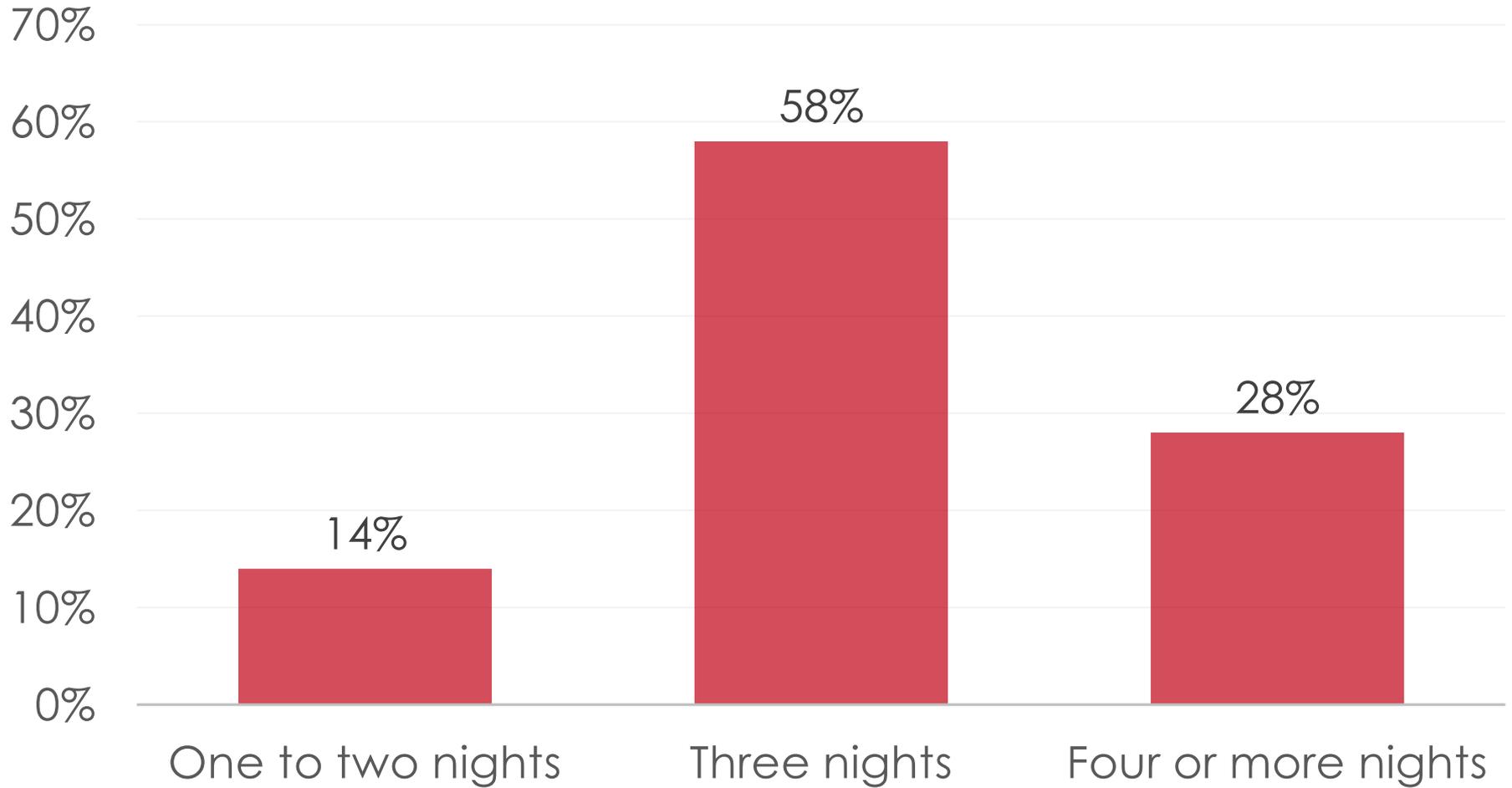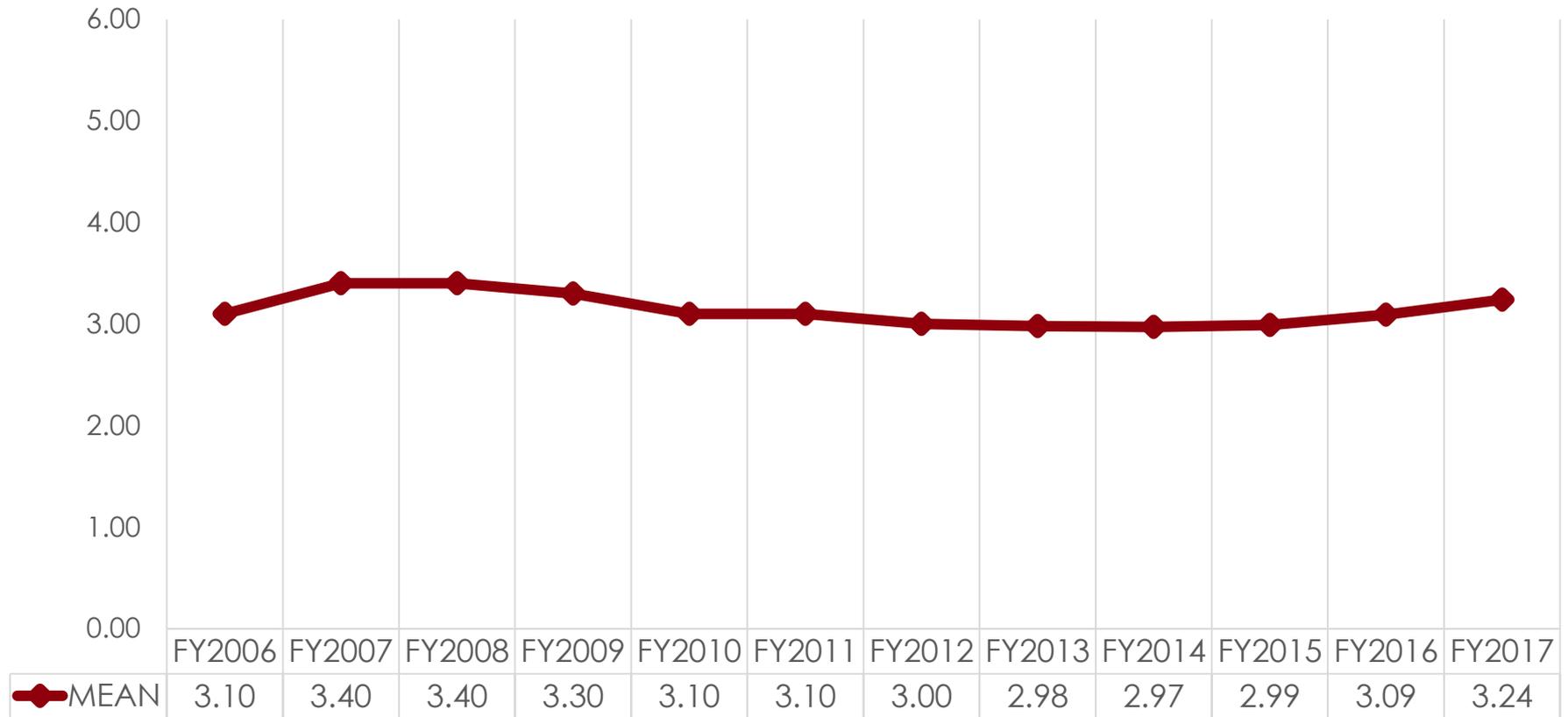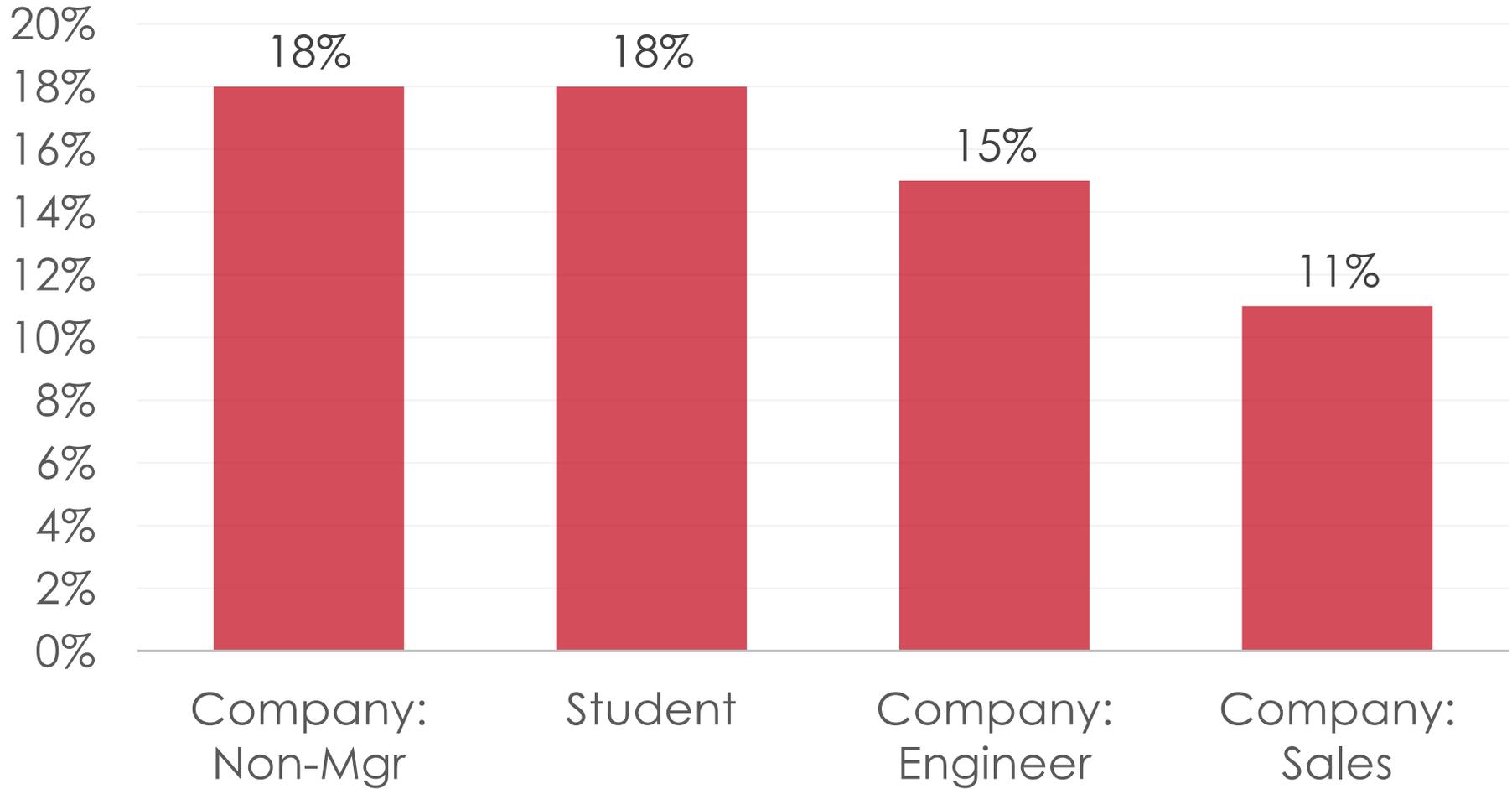
SECTION 2
TRAVEL PLANNING

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Organized Group Tour

No
74%

Organized
Group Tour
26%

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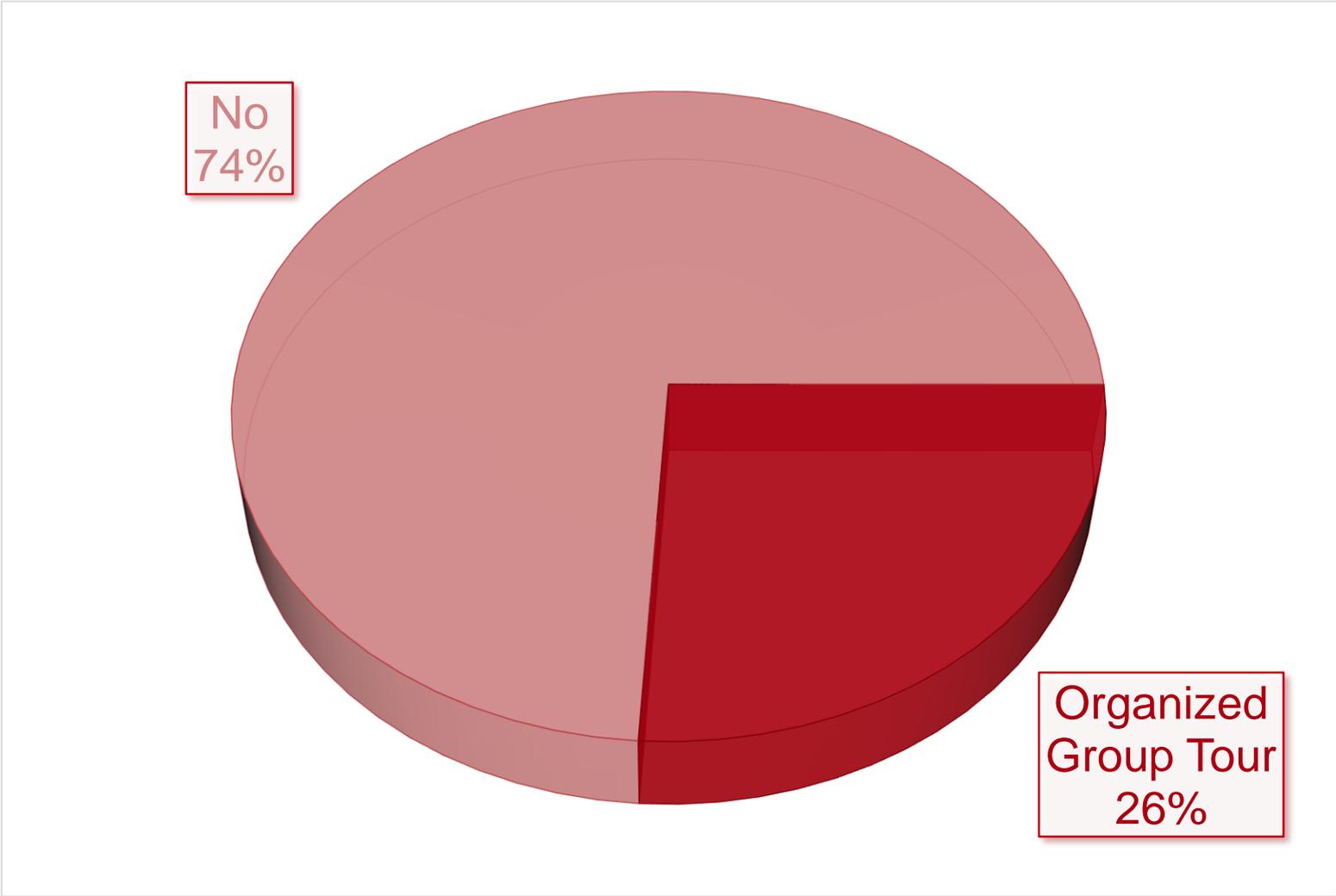
Organized Group Tour
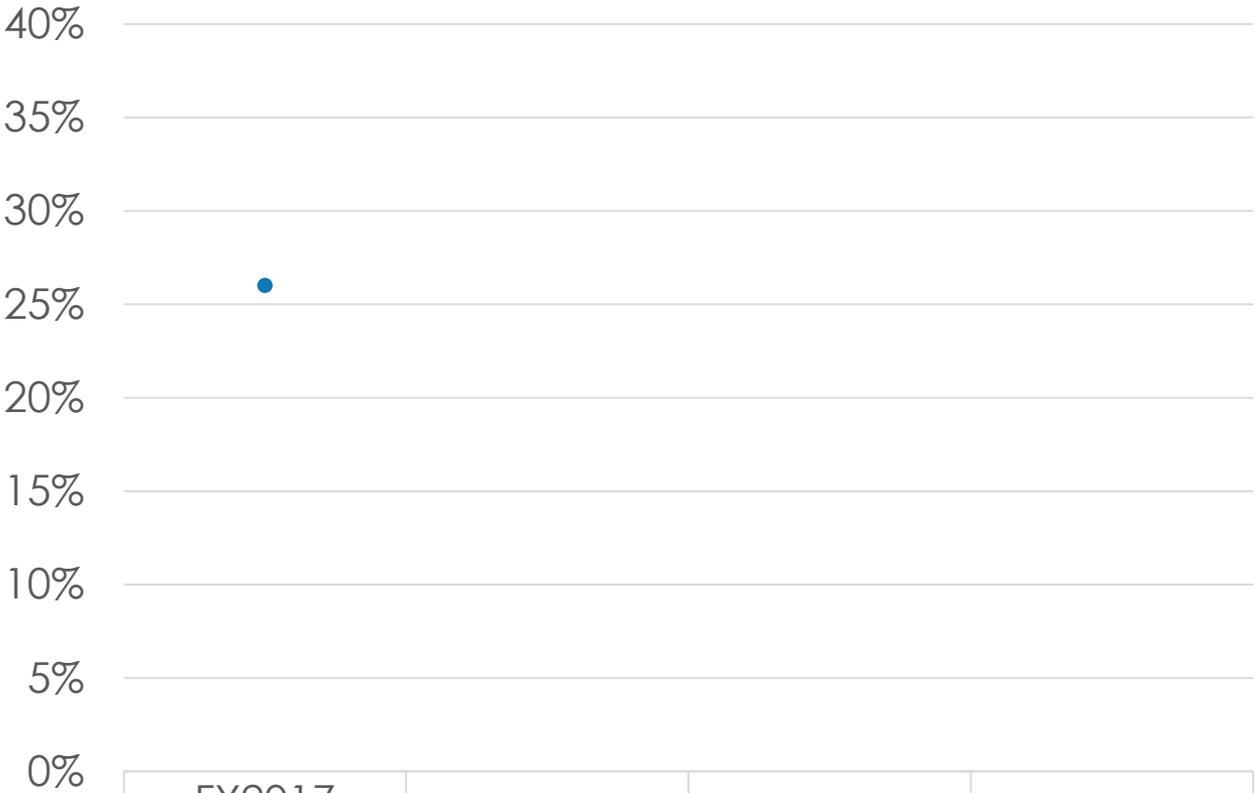
	FY2017			
—●—Organized Group Tour	26%			

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Travel Arrangements

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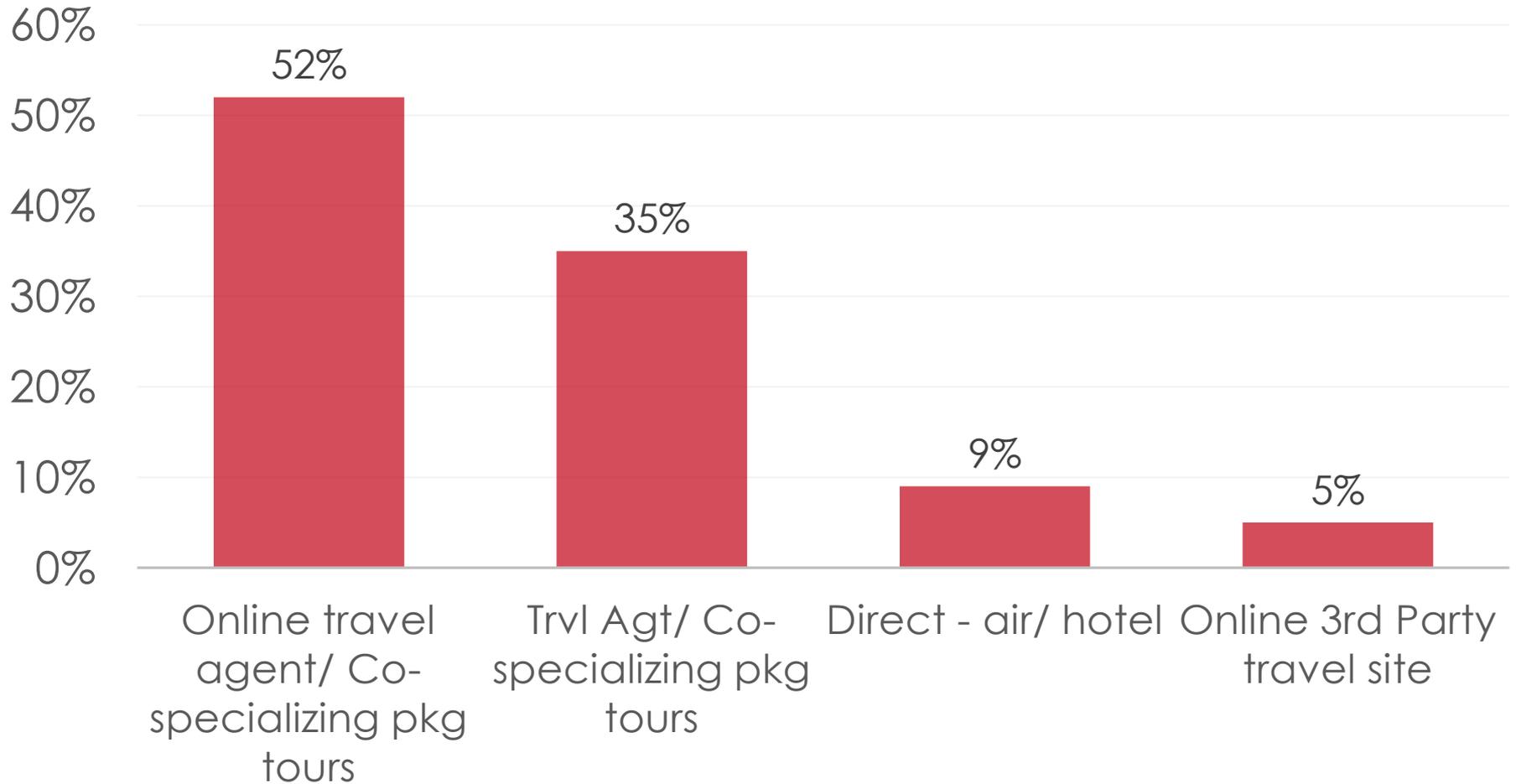
Travel Arrangements

	FY2017			
●— Online travel agent	52%			
●— Trvl Agt/ Co- Pkg Tour	35%			
●— Online 3rd Party	5%			
●— Direct Air/ Hotel	9%			

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Prepaid Package Tour

No
12%

Prepaid Pkg
88%

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Prepaid Package Tour

	FY2017			
Prepaid Pkg Trip	88%			

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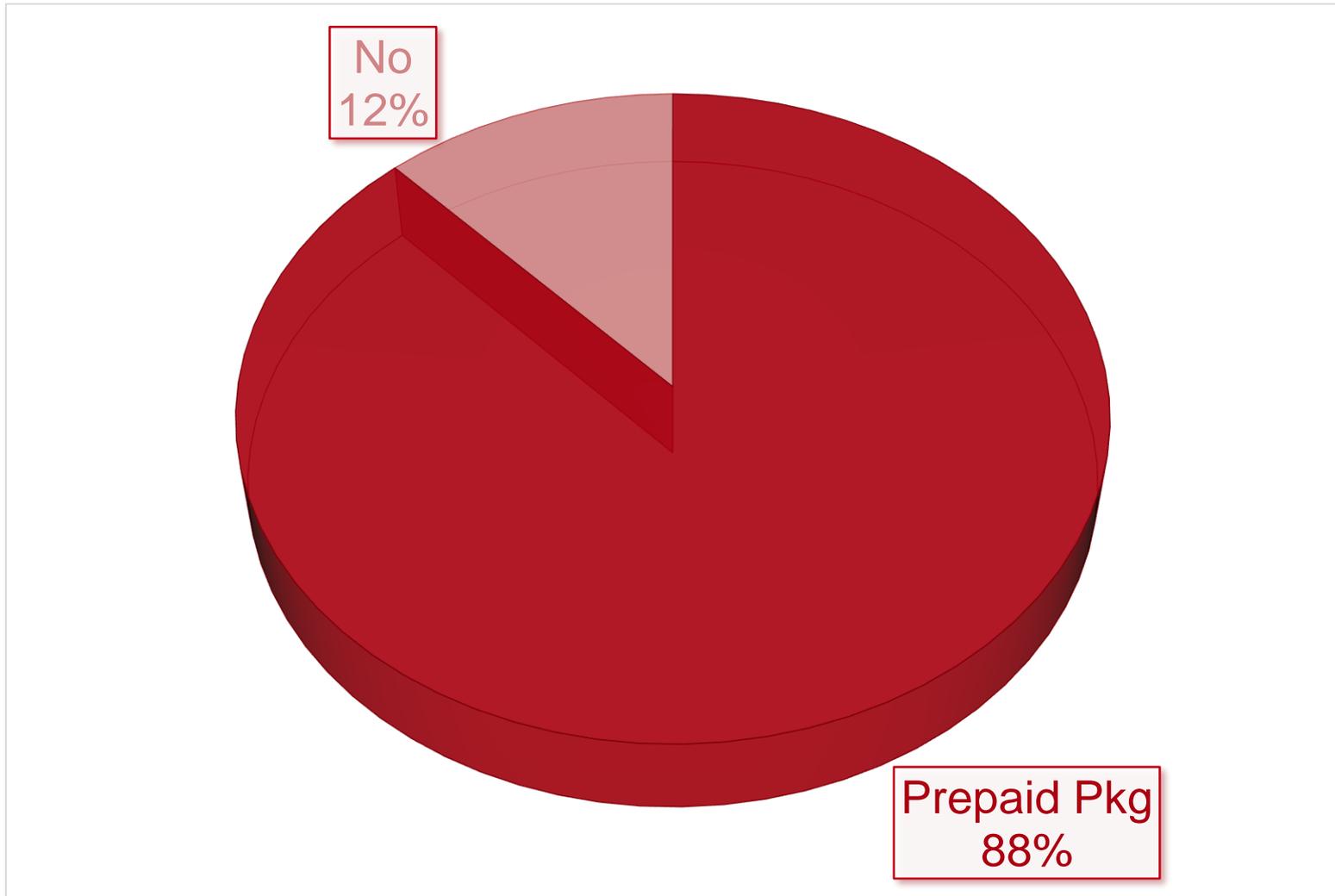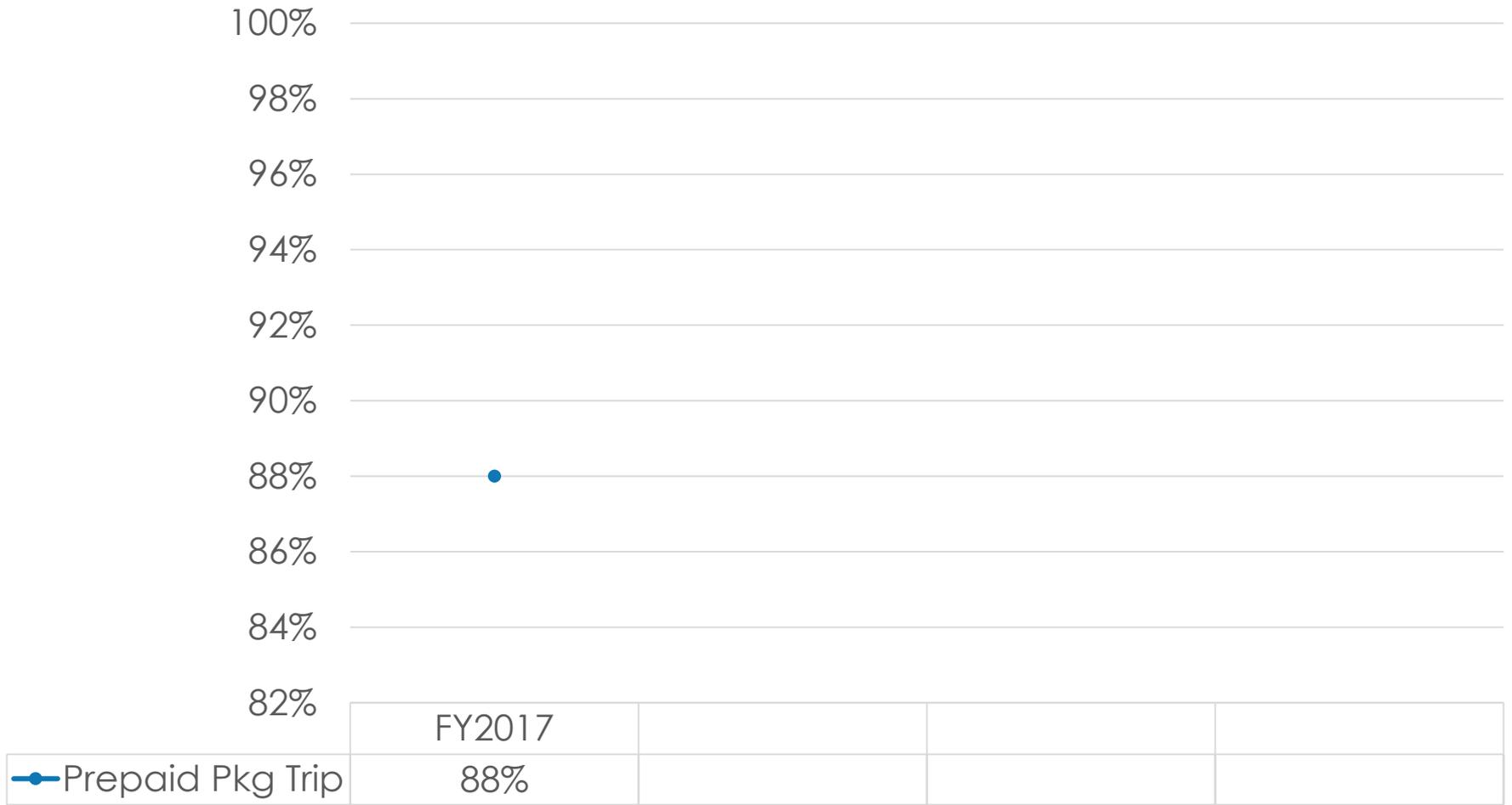
Accommodations (Top Responses)

Legend: Stayed At — Length of Stay

Data points:

Hotel	Stayed At	Length of Stay
Guam Plaza Hotel	12%	3.05
Outrigger Guam Resort	12%	3.34
Guam Reef & Olive	9%	3.06
Royal Orchid Guam	8%	3.10
Hotel Nikko Guam	6%	3.21
PIC	6%	3.41
Hilton Guam Resort	5%	3.43
Fiesta Resort	5%	3.05
Onward Beach Resort	5%	3.39
Grand Plaza Hotel	5%	2.91

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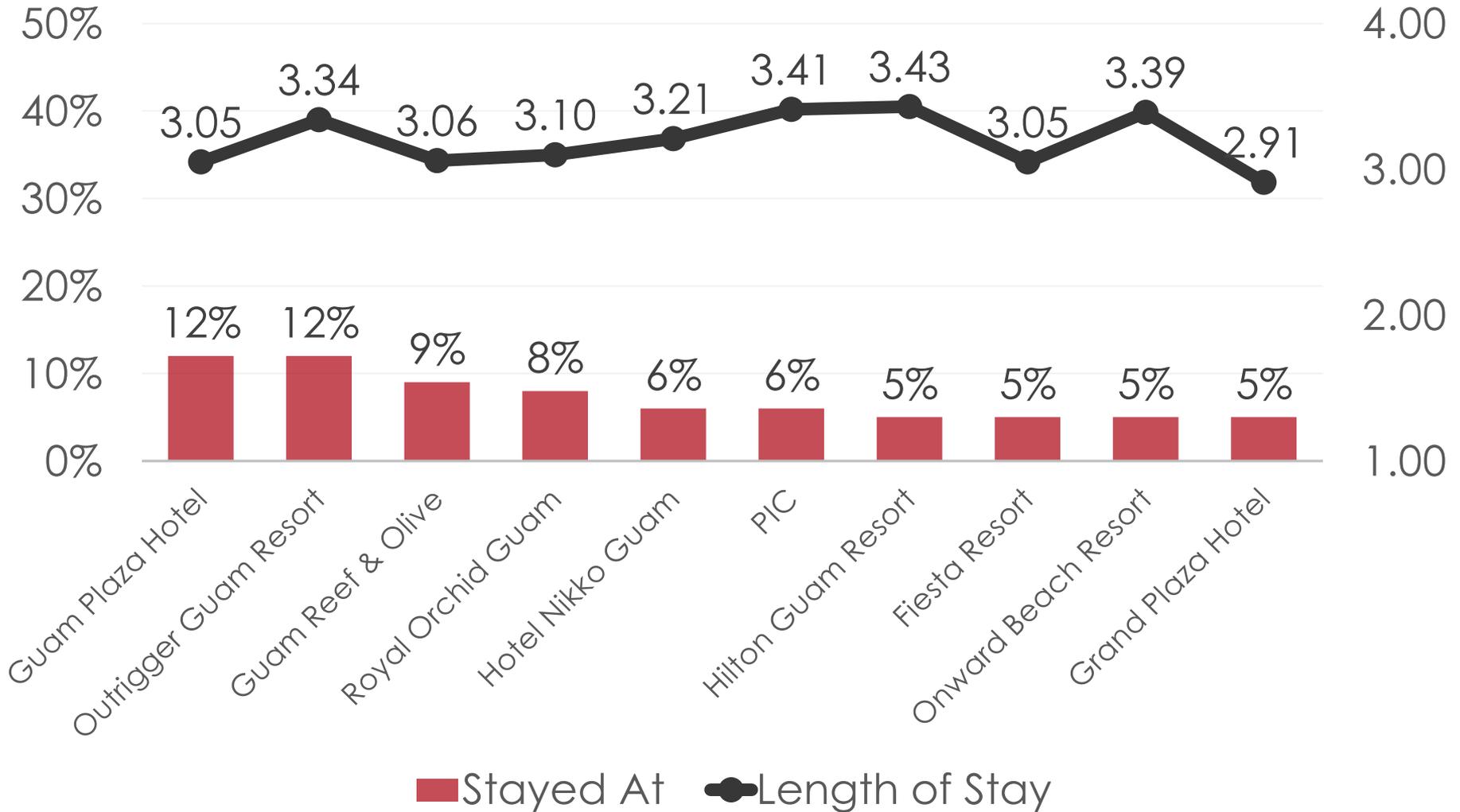
Travel Motivation (Top Responses)

Motivation	Percentage
Natural beauty	60%
Short travel time	40%
Prior trip	28%
Pleasure	28%
Shopping	22%
Price	21%
Recomm	18%
Relax	16%
Safety	16%
Water sport	15%

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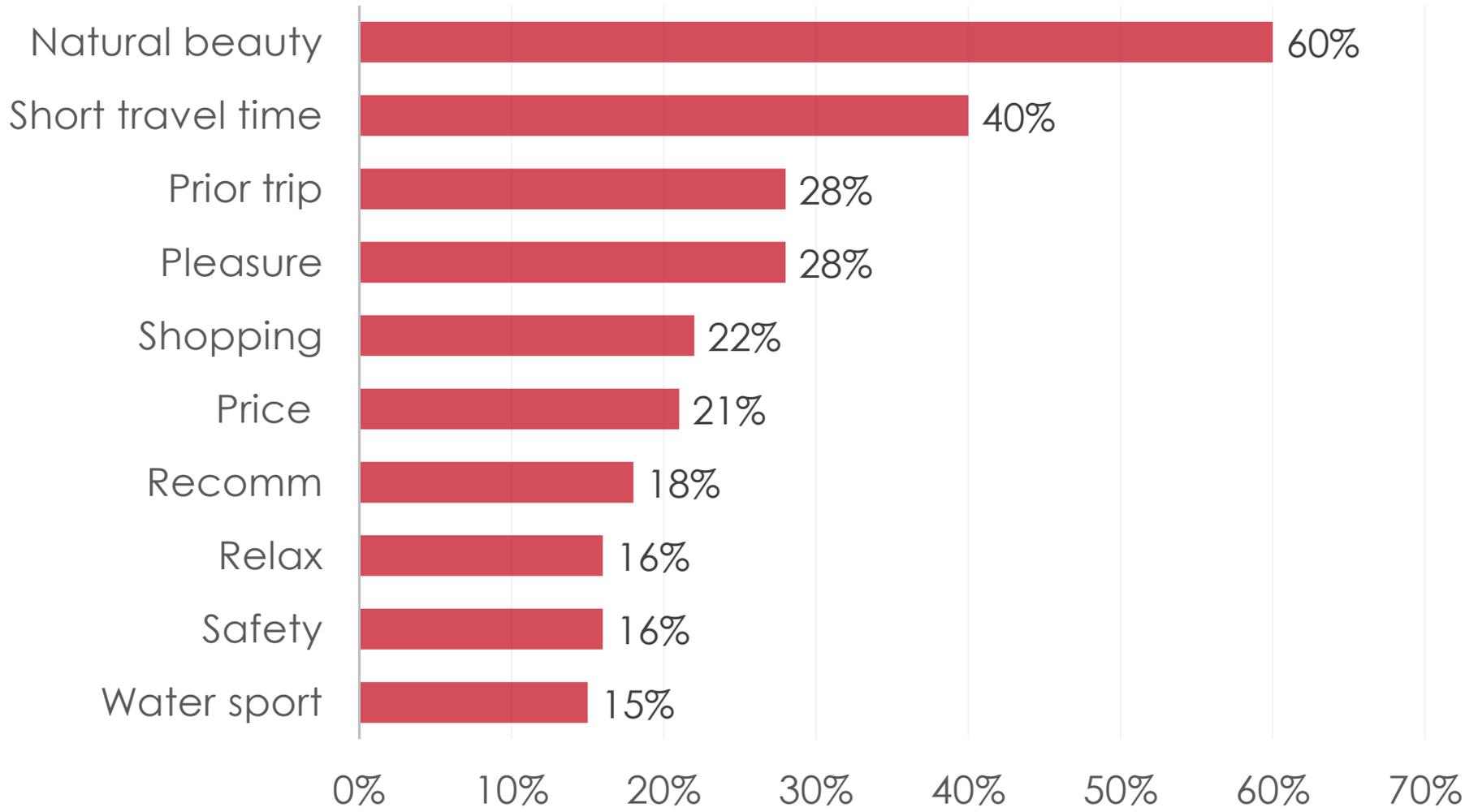
Travel Motivation – Top 3

FY2017
60% Natural beauty 40% Short travel time 28% Pleasure 28% Prior trip

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SECTION 3
EXPENDITURES

[A]

Prepaid Expenditures

- $1,844.75 = overall mean average prepaid expense (for entire travel party size) by respondent

- $853.76 = overall mean average <u>per person</u> prepaid expenditures

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Prepaid Entire Travel Party – Tracking

MEAN	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
	$1,728.00	$1,816.00	$1,925.00	$1,513.90	$1,993.70	$1,820.20	$1,492.88	$1,546.41	$1,475.15	$1,679.34	$1,844.75

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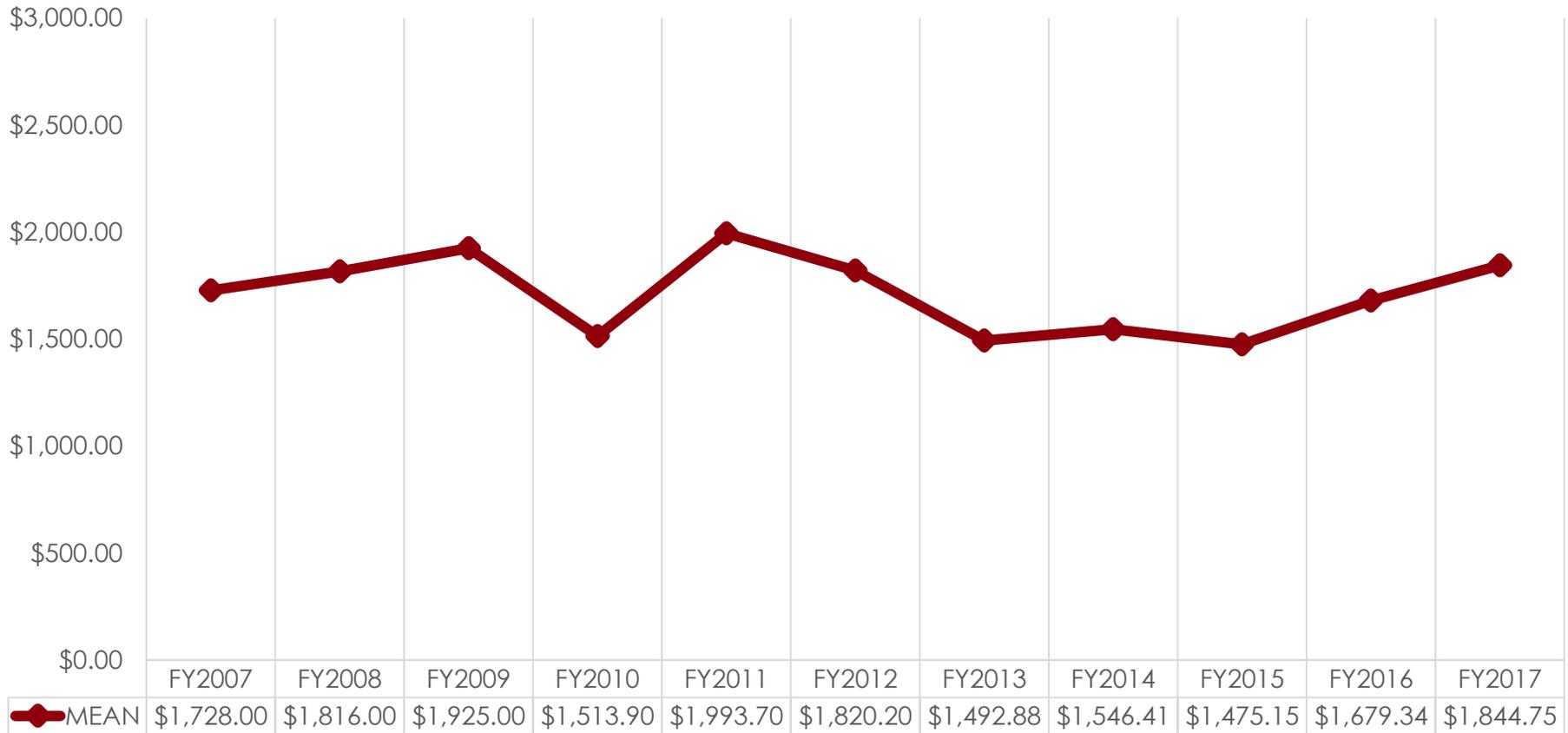
Prepaid Per Person – FY2017 Tracking

	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$769.79	$846.79	$865.94	$720.90	$926.60	$900.30	$751.20	$774.17	$731.16	$820.05	$853.76

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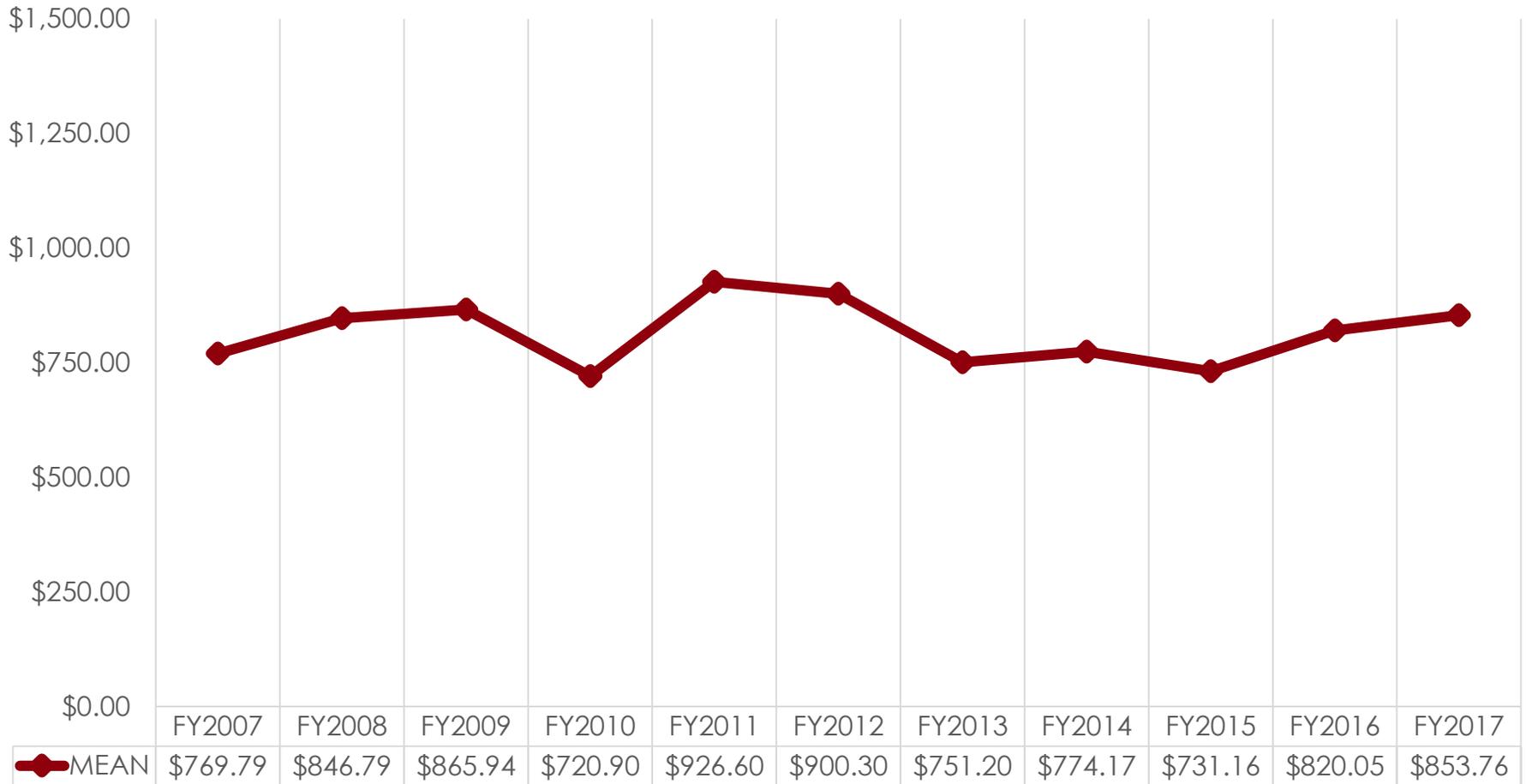
Prepaid Expenses by Category – Mean Entire Travel Party

Category	Amount
Air/Hotel pkg	$1,784.13
Air/Hotel/Meal pkg	$2,887.87
Air Only	$1,387.12
Hotel Only	$727.03
Hotel/Meal	$1,280.81
F&B Hotel	$198.90
Ground Trans-Japan	$80.49
Ground Trans-Guam	$71.81
Optional Tour	$227.18
Other	$607.04

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Prepaid – FY2017 Tracking
Airfare & Accommodation Packages

	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$1,550.00	$1,589.00	$1,696.00	$1,402.50	$1,767.00	$1,681.20	$1,369.90	$1,442.20	$1,473.63	$1,653.77	$1,784.13

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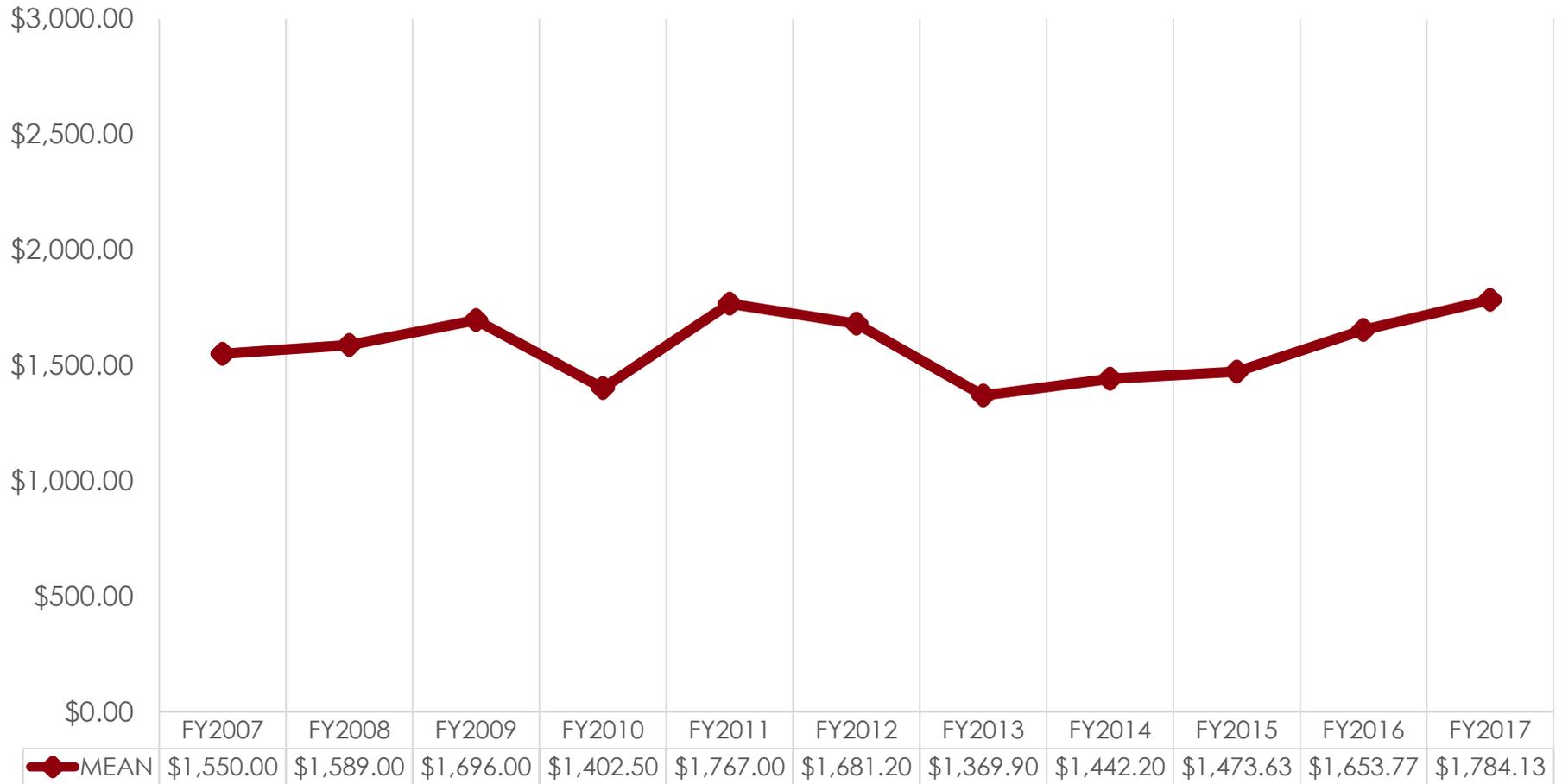
Prepaid – FY2017 Tracking
Airfare & Accommodation W/ Meal Packages

	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$2,536.00	$3,404.00	$3,006.00	$3,199.80	$3,555.90	$3,546.00	$2,276.72	$2,779.61	$2,721.85	$2,805.90	$2,887.87

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Prepaid– FY2017 Tracking
Airfare Only

	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$1,129.00	$924.00	$937.00	$952.90	$1,359.60	$1,836.40	$1,454.43	$1,330.39	$1,435.94	$1,418.64	$1,387.12

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Prepaid– FY2017 Tracking
Accommodations Only

	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$532.00	$520.00	$748.00	$524.00	$748.30	$1,136.9	$843.15	$684.83	$715.78	$861.75	$727.03

[A]

Prepaid – FY2017 Tracking
Accommodations w/ Meal Only

	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$934.00	$887.00	$595.00	$944.70	$1,040.70	$838.10	$1,596.78	$1,207.25	$1,345.94	$1,138.20	$1,280.81

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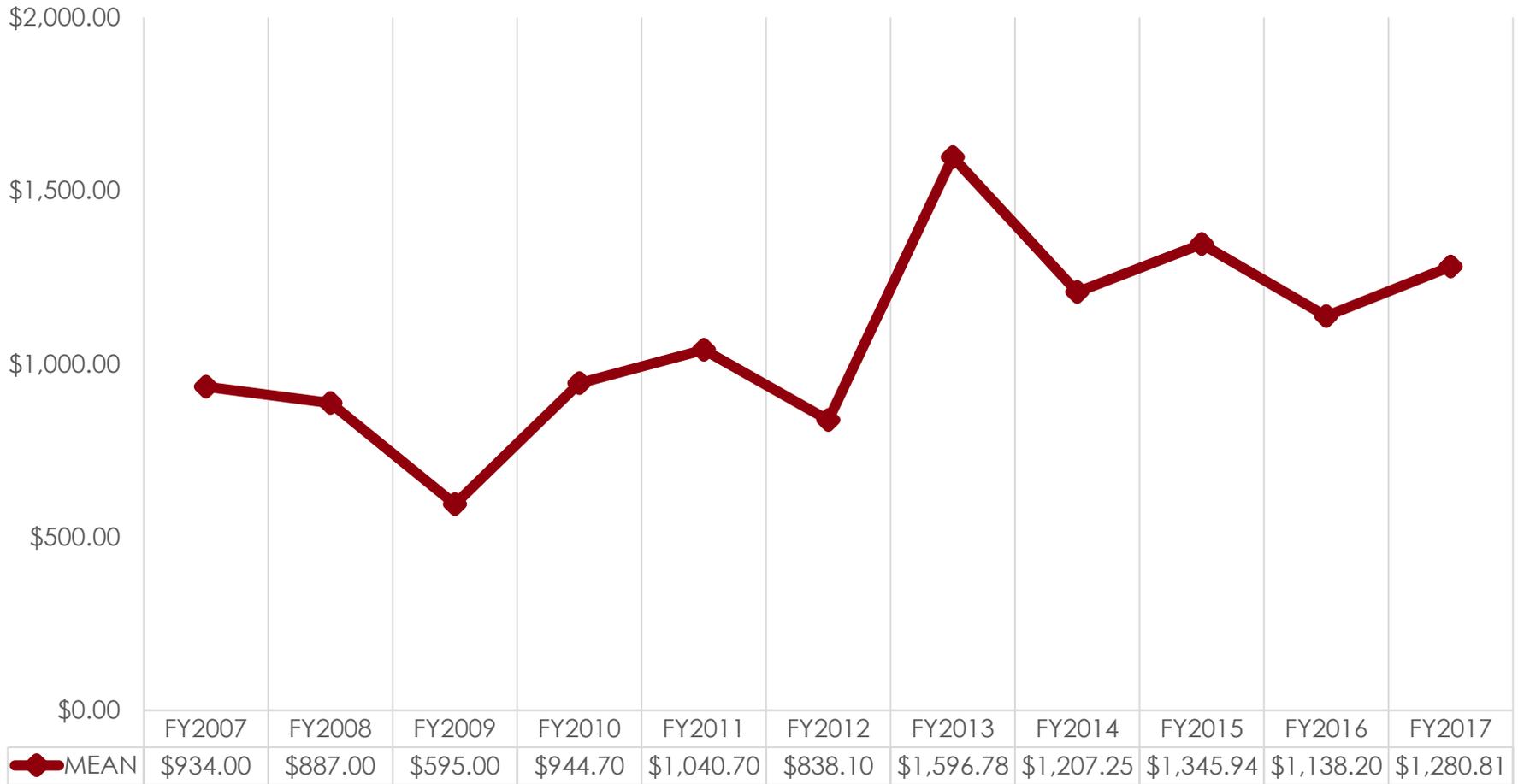
Prepaid – FY2017 Tracking
Food & Beverage in Hotel
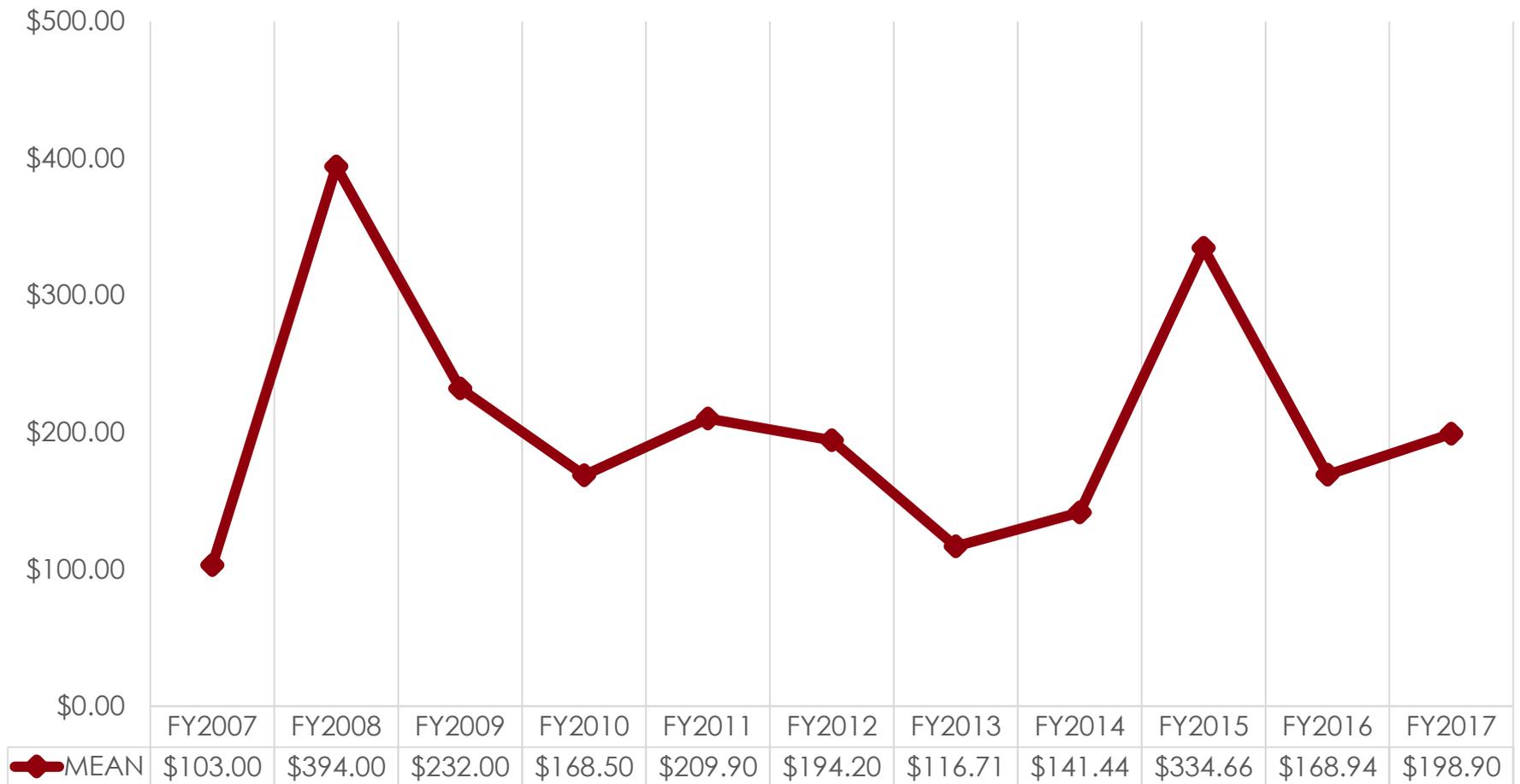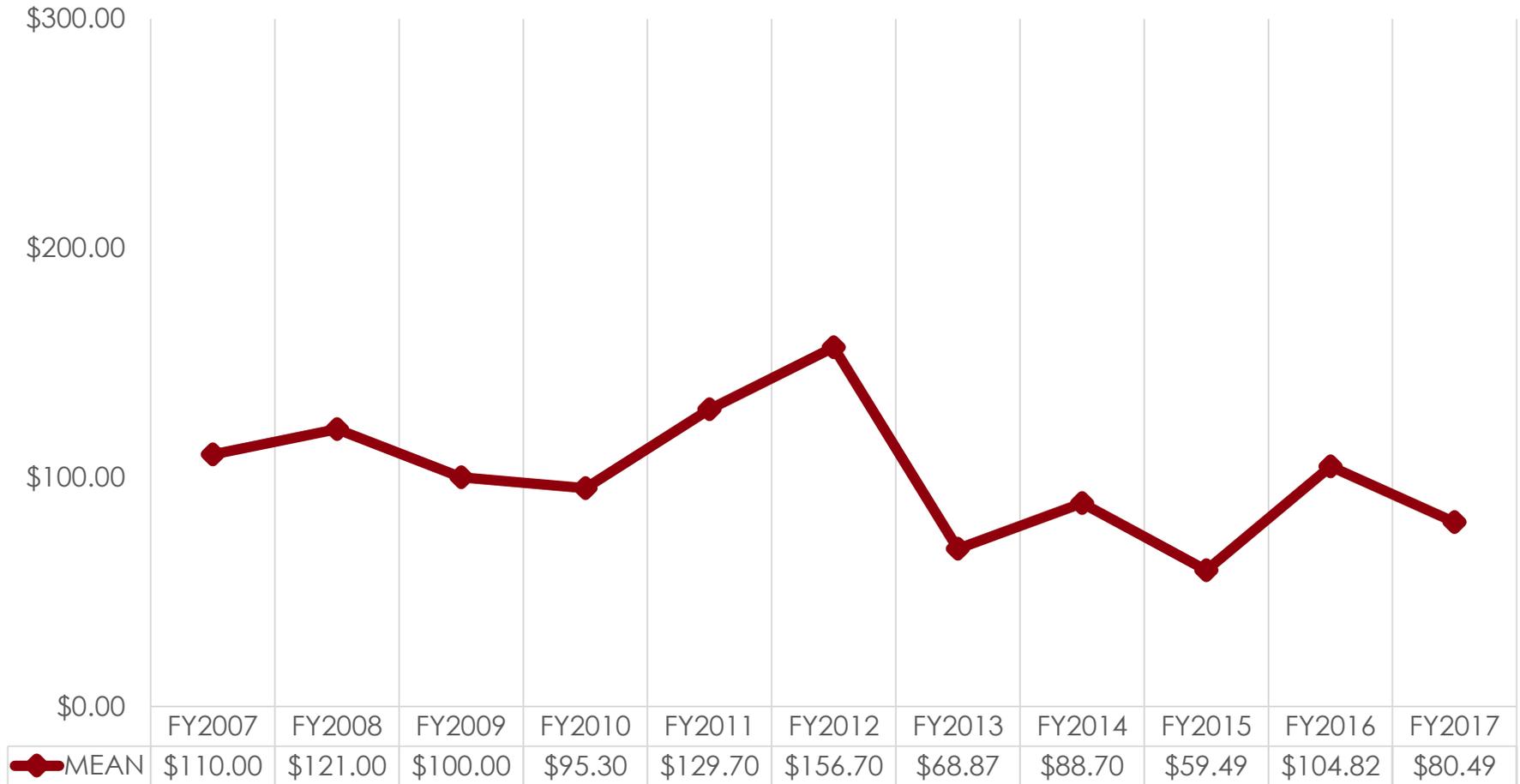
	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$103.00	$394.00	$232.00	$168.50	$209.90	$194.20	$116.71	$141.44	$334.66	$168.94	$198.90

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Prepaid – FY2017 Tracking
Ground Transportation - Japan

	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$110.00	$121.00	$100.00	$95.30	$129.70	$156.70	$68.87	$88.70	$59.49	$104.82	$80.49

[A]

Prepaid – FY2017 Tracking
Ground Transportation - Guam

	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$62.00	$88.00	$93.00	$93.90	$58.60	$100.80	$75.43	$116.66	$71.02	$88.91	$71.81

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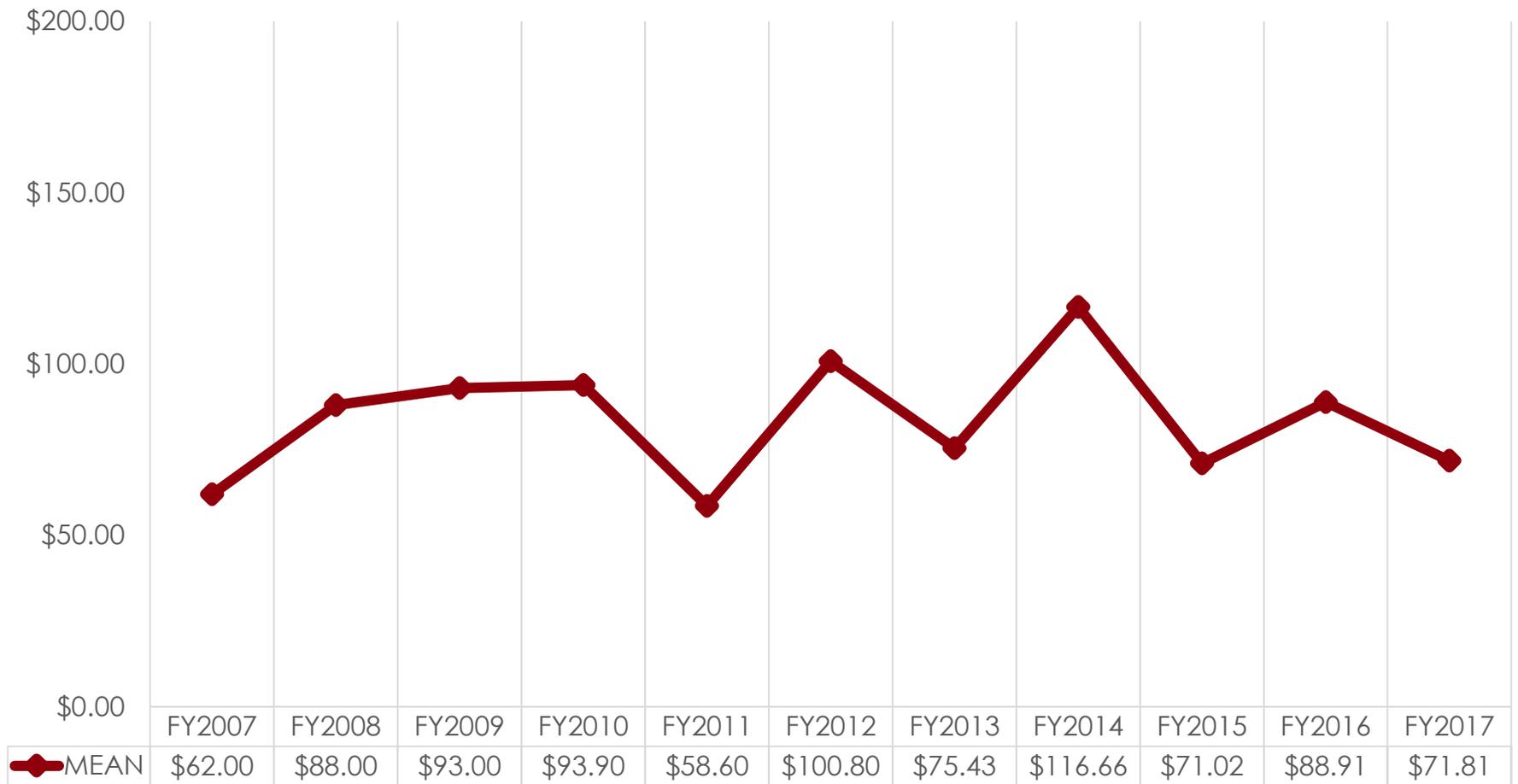
Prepaid – FY2017 Tracking
Optional tours/ Activities

|	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$274.00	$255.00	$316.00	$289.50	$298.60	$302.40	$273.09	$303.01	$249.04	$273.45	$277.18

[A]

On-Island Expenditures

- $740.27 = overall mean average prepaid expense (for entire travel party size) by respondent

- $438.57 = overall mean average <u>per person</u> prepaid expenditures

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On-Island Entire Travel Party – FY2017 Tracking

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$976.60	$1,145.20	$1,058.30	$1,120.80	$866.50	$933.40	$899.50	$781.50	$777.05	$745.03	$741.74	$740.27

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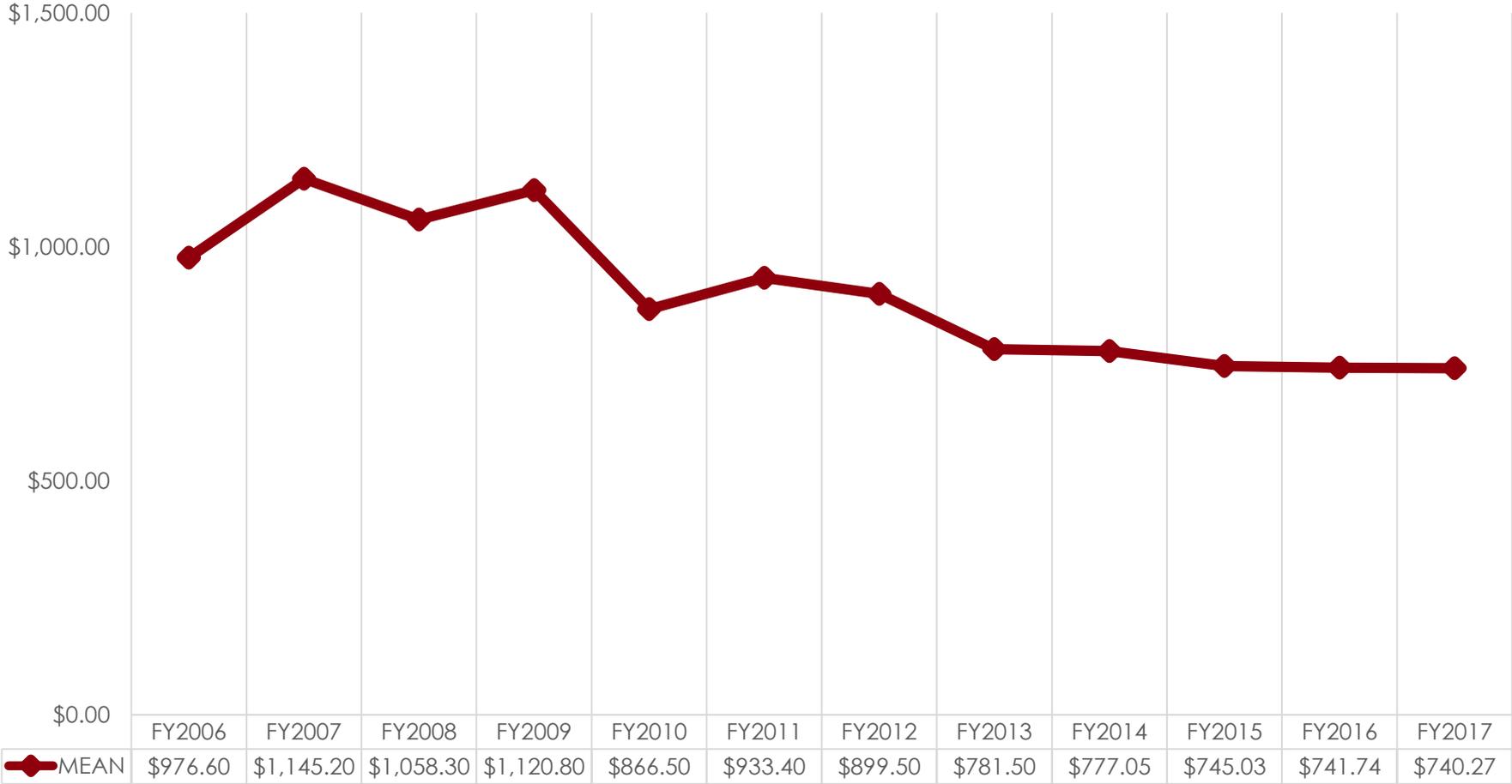
On-Island Per Person – FY2017 Tracking

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$666.21	$584.22	$603.26	$605.71	$499.40	$558.50	$596.00	$498.25	$488.15	$443.17	$442.27	$438.57

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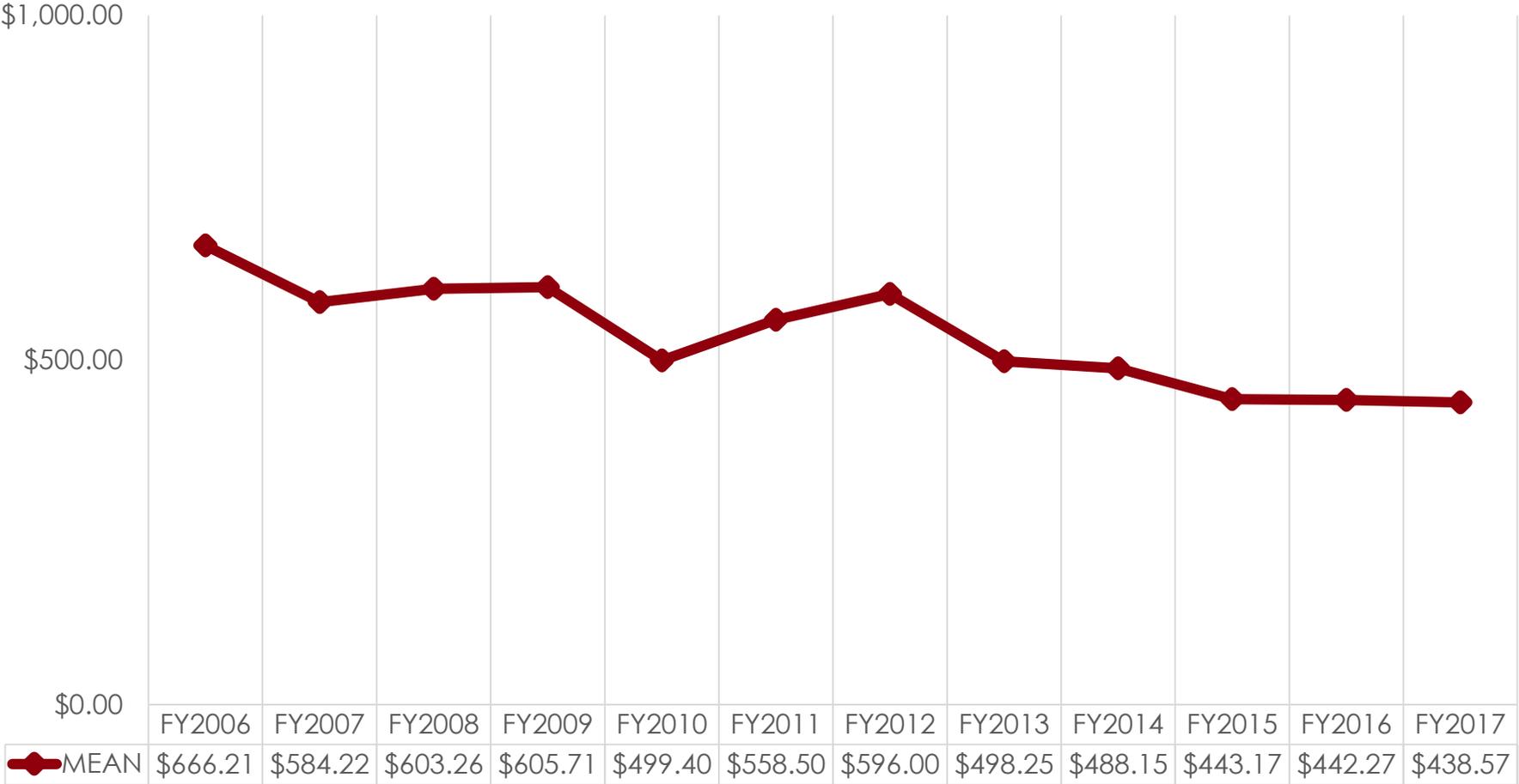
Per Person MEAN expenditures – FY2017 Tracking On-Island/ Prepaid

Chart showing Per Person MEAN expenditures for FY2006 through FY2017 comparing On Island and Prepaid.

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
On Island	$662.04	$584.22	$603.26	$605.71	$499.40	$558.50	$596.00	$498.25	$488.15	$443.17	$442.27	$438.57
Prepaid	$666.21	$769.79	$846.79	$865.94	$720.90	$926.60	$900.30	$751.20	$774.17	$731.16	$820.05	$853.76

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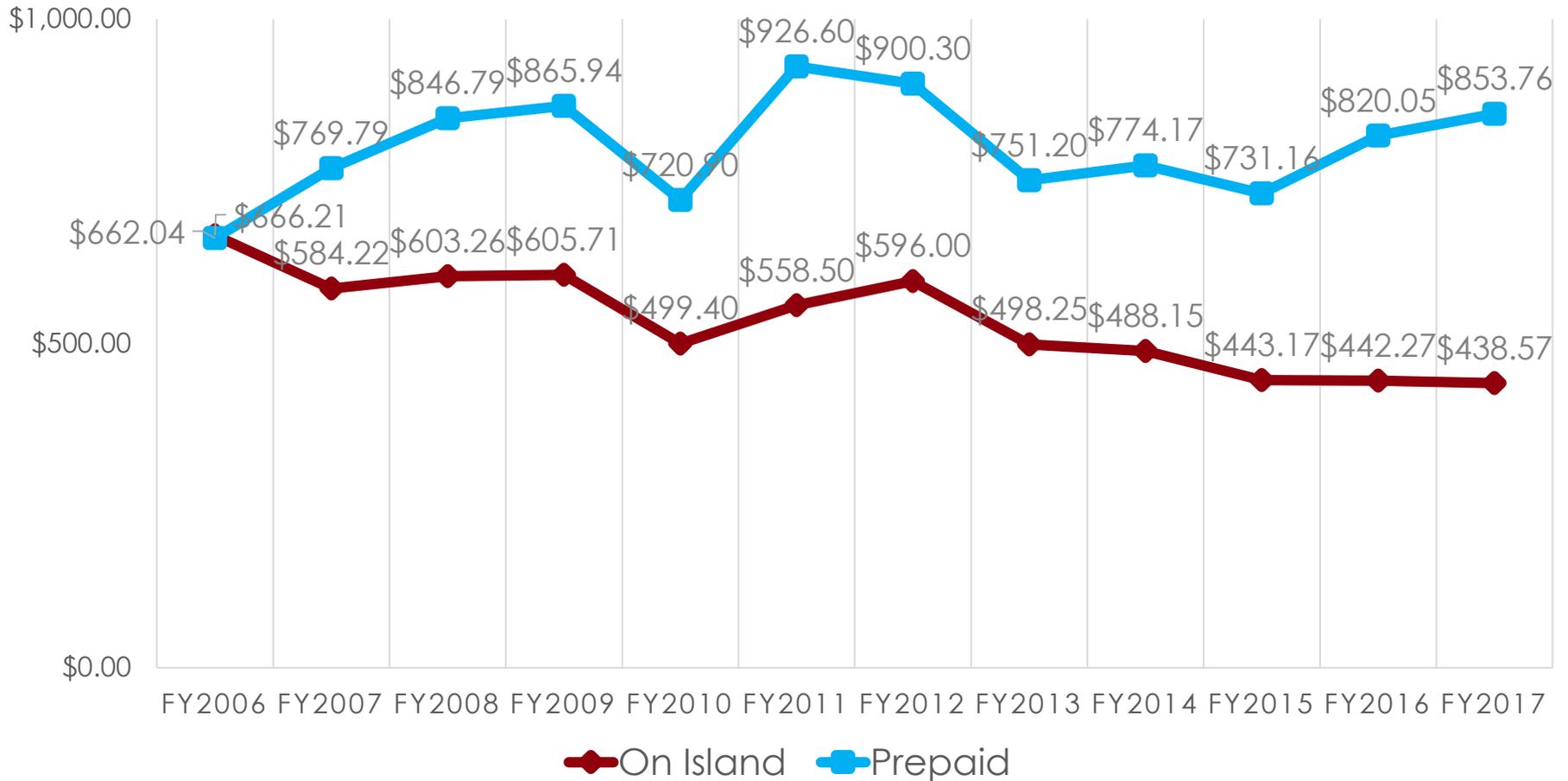
On-Island Per Day Spending – FY2017 Tracking Mean

Chart showing On-Island Per Day Spending for FY2014 through FY2017.

	FY2014	FY2015	FY2016	FY2017
Per Person	$177.23	$158.00	$151.03	$140.98
Travel Party	$270.78	$251.23	$242.07	$229.44

Per Person   Travel Party

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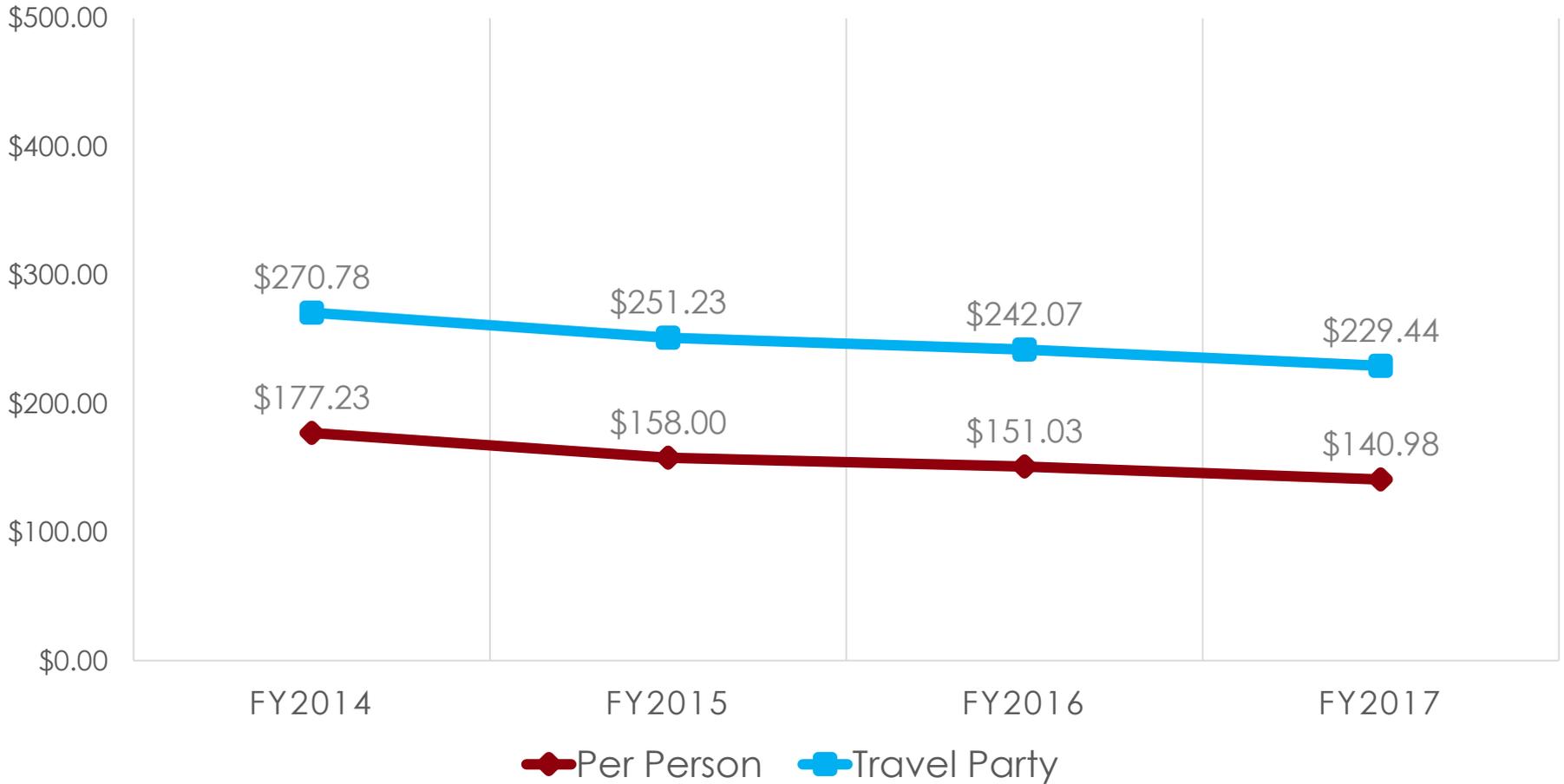
On-Island Expenses by Category – Mean Entire Travel Party

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On-Island – FY2017 Tracking
Food & Beverage - Hotel

A line chart showing Food & Beverage - Hotel values by fiscal year:

Fiscal Year	Value
FY2006	$37.30
FY2007	$56.40
FY2008	$54.50
FY2009	$46.10
FY2010	$41.80
FY2011	$34.50
FY2012	$33.10
FY2013	$35.62
FY2014	$39.76
FY2015	$39.38
FY2016	$42.86
FY2017	$48.14

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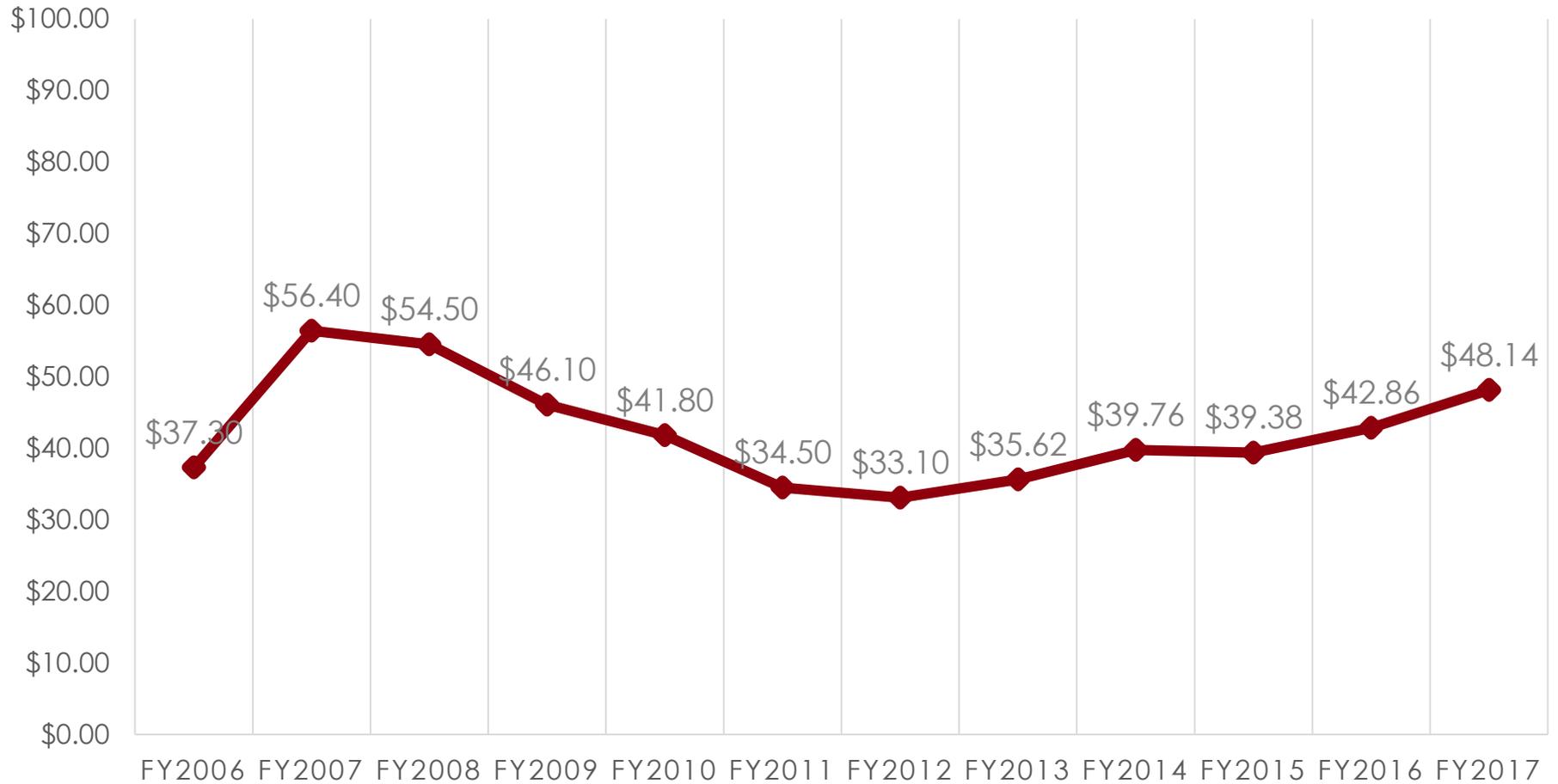
On-Island – FY2017 Tracking
## Food & Beverage – Fast Food/ Convenience Store

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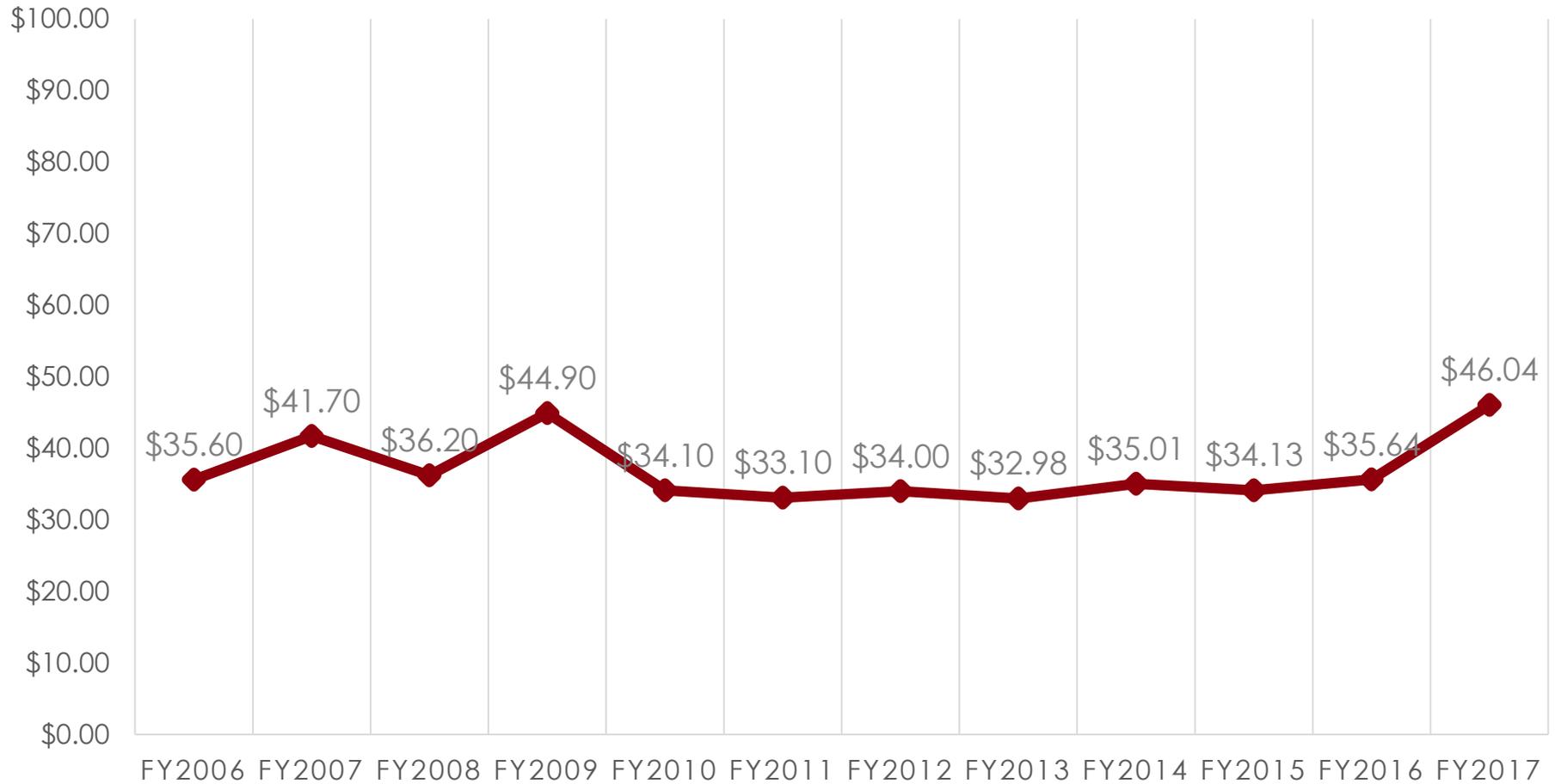
On-Island – FY2017 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel

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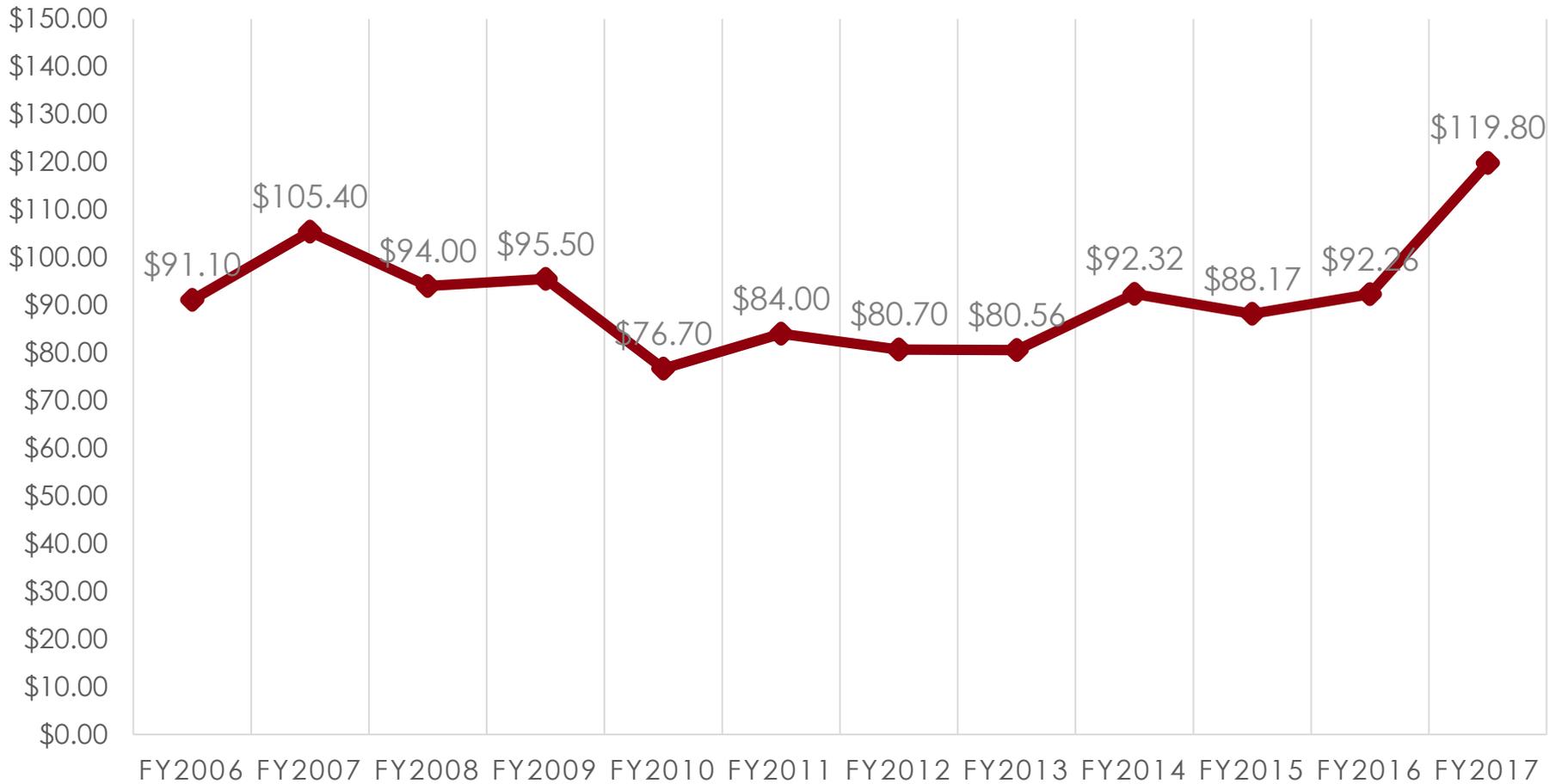
On-Island – FY2017 Tracking
## Optional tour/ Activities

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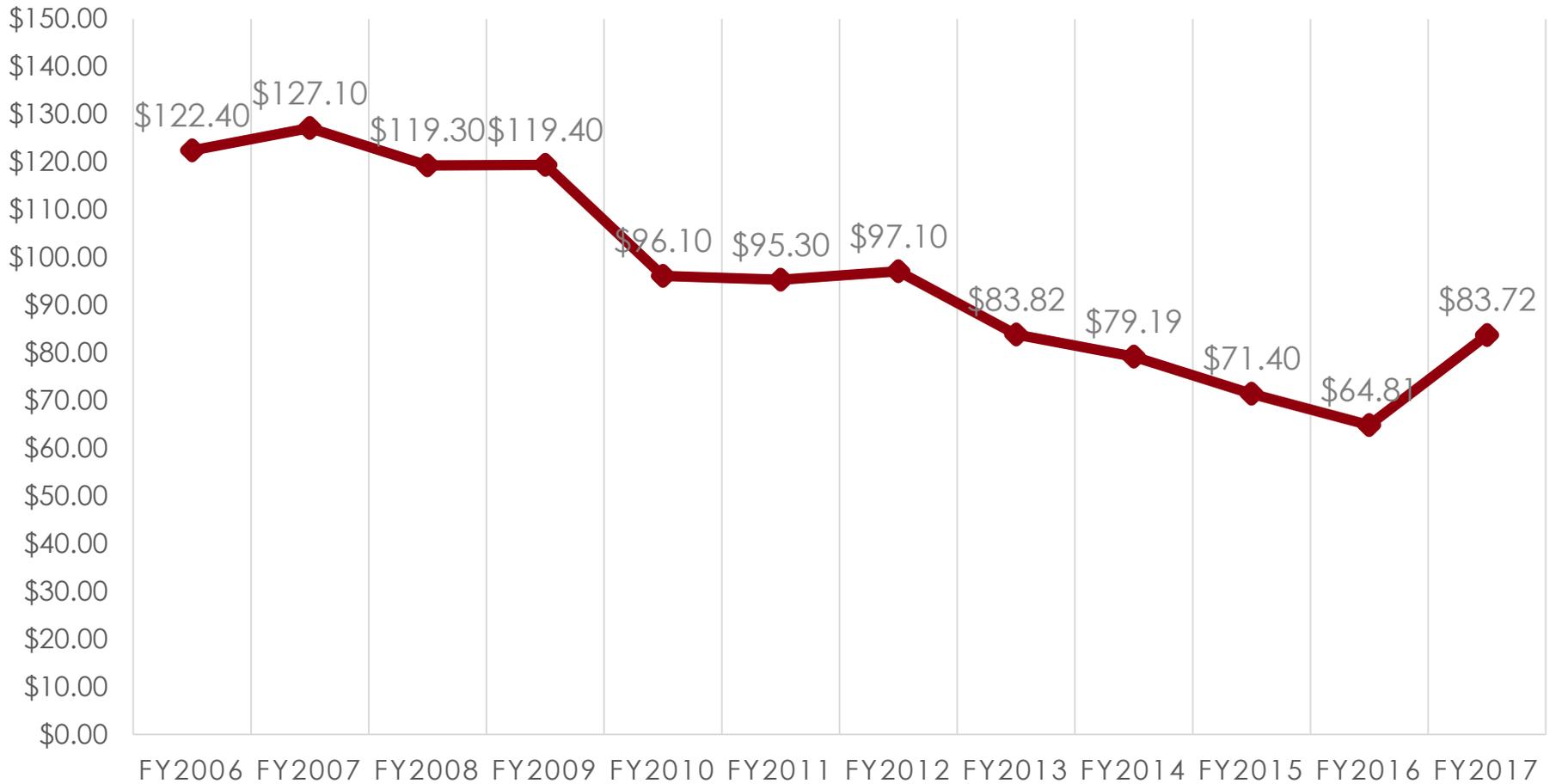
On-Island – FY2017 Tracking
Gift/ Souvenir – Self/ Companion

A line chart showing Gift/Souvenir spending per fiscal year:
- FY2006: $380.80
- FY2007: $338.40
- FY2008: $287.10
- FY2009: $354.00
- FY2010: $245.00
- FY2011: $253.30
- FY2012: $258.00
- FY2013: $204.79
- FY2014: $203.01
- FY2015: $151.70
- FY2016: $175.38
- FY2017: $185.16

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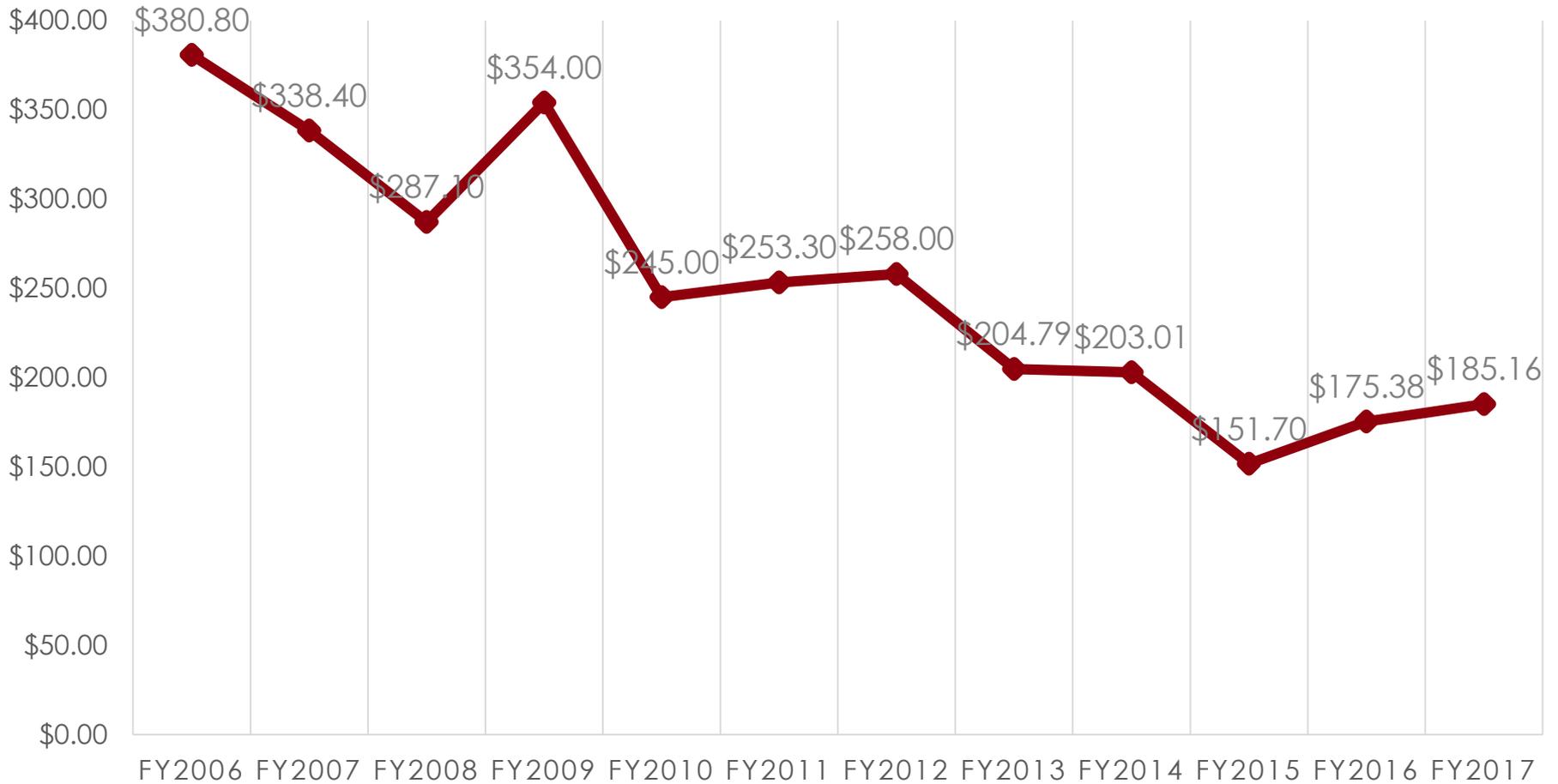
On-Island – FY2017 Tracking
Gift/ Souvenir – Friends/ Family

Chart data points:
- FY2006: $181.60
- FY2007: $174.70
- FY2008: $143.70
- FY2009: $181.90
- FY2010: $126.50
- FY2011: $129.30
- FY2012: $136.40
- FY2013: $121.09
- FY2014: $121.41
- FY2015: $106.32
- FY2016: $107.27
- FY2017: $131.77

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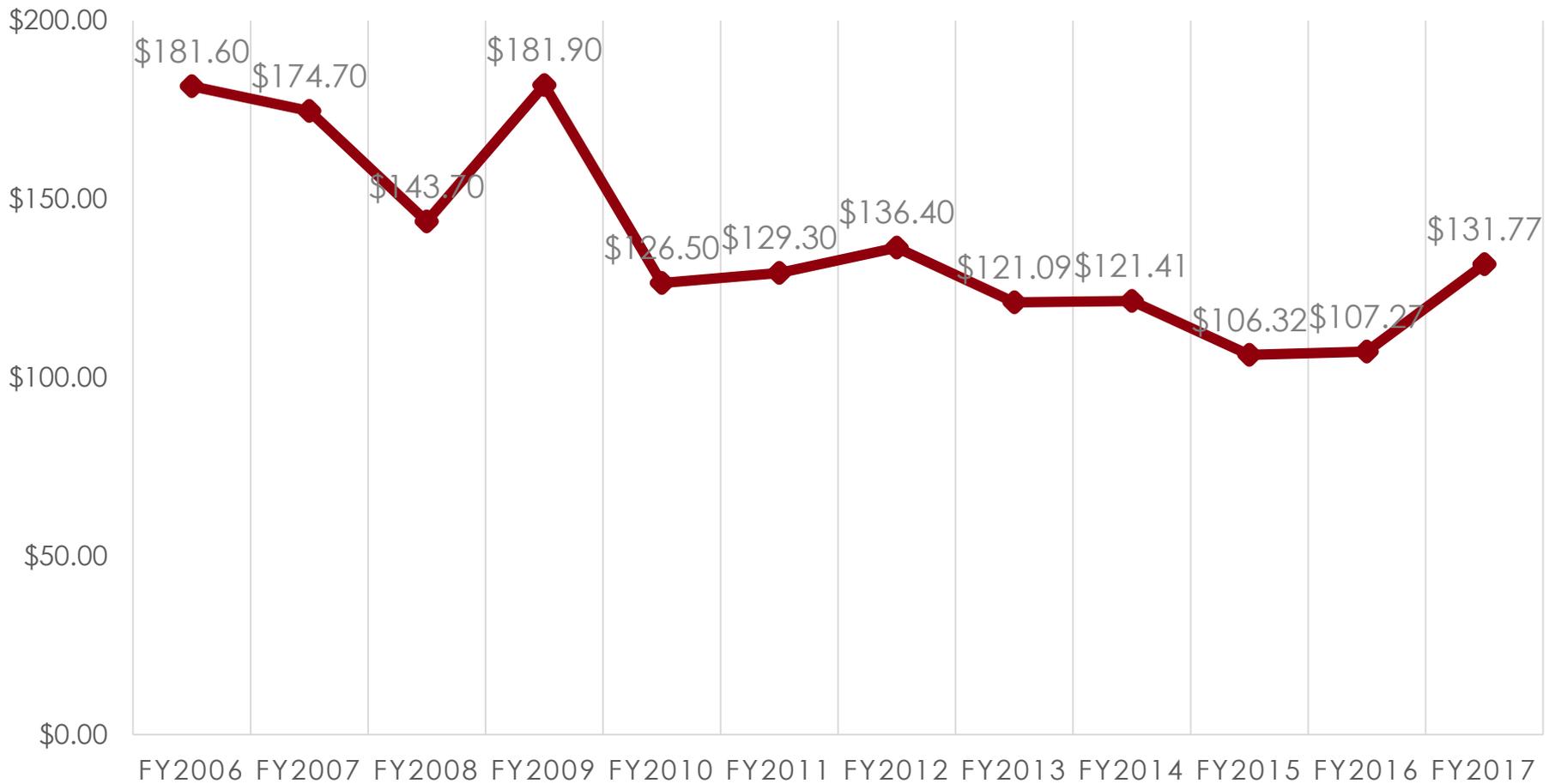
# On-Island – FY2017 Tracking
Local Transportation

[A]
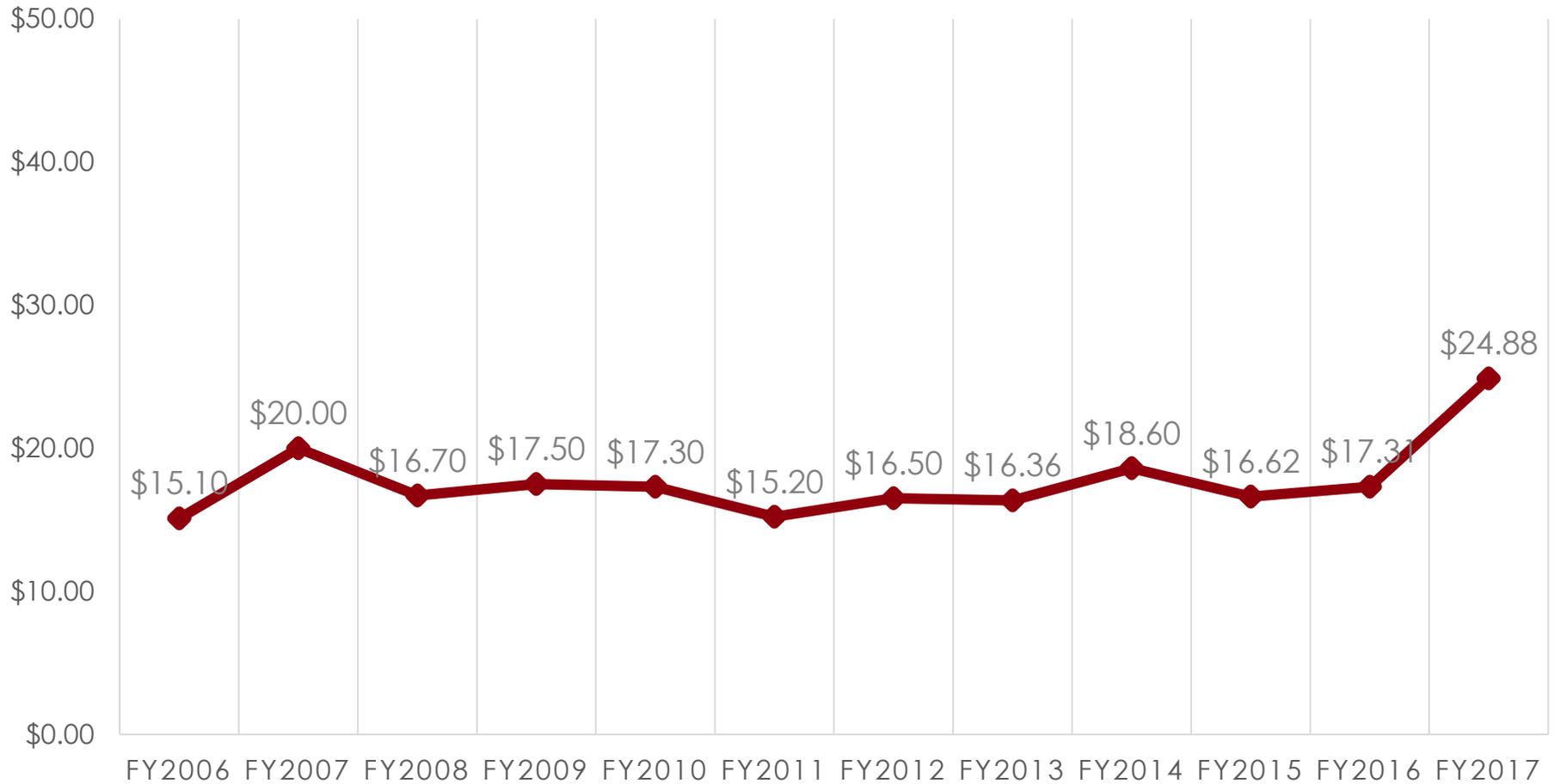
On-Island – FY2017 Tracking
## Other Not Included

[A]
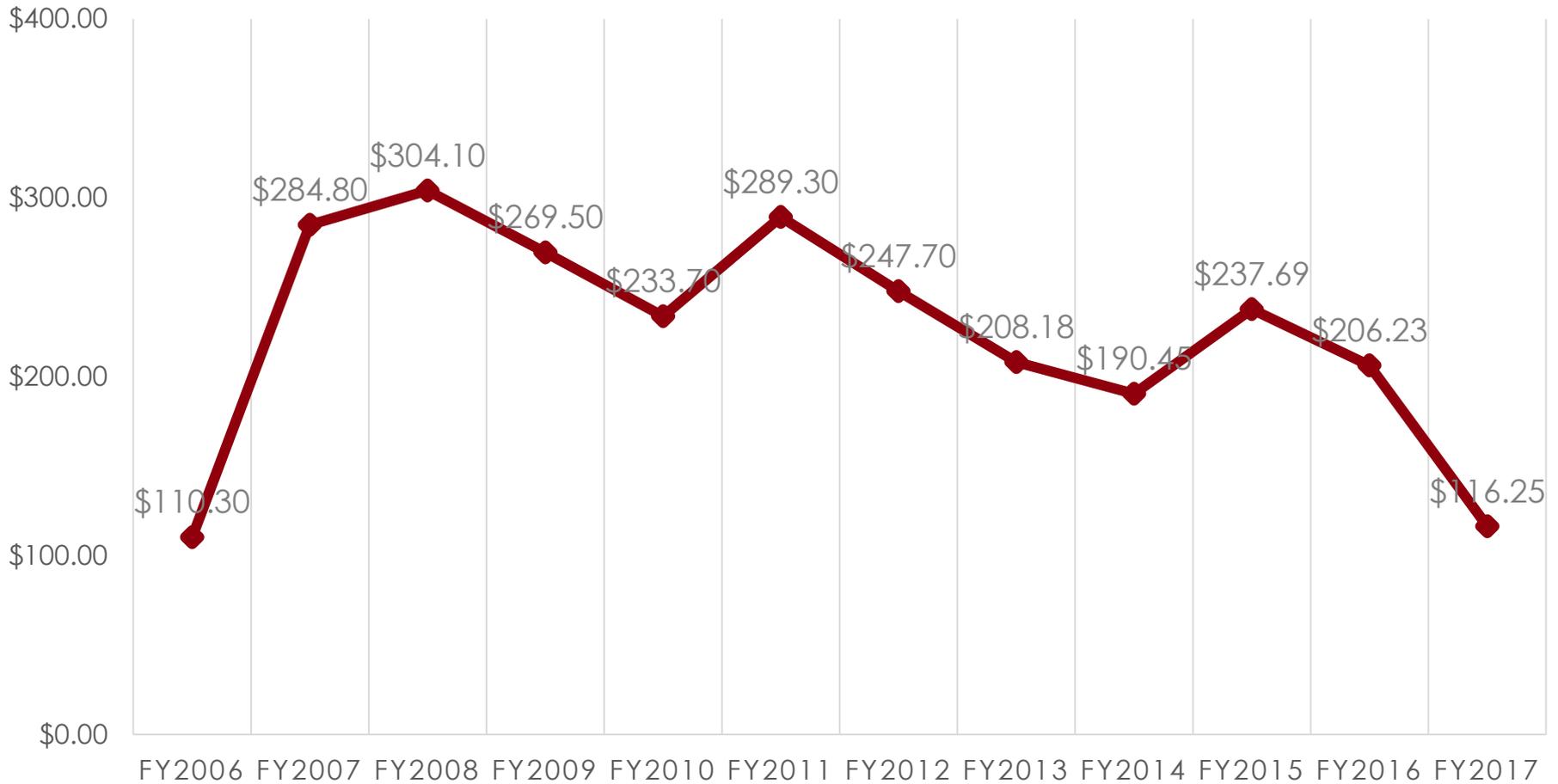
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- $1,288.13 = overall mean average prepaid expense by respondent

[A]

TOTAL Per Person Expenditures – FY2017 Tracking

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
MEAN	$1,287.98	$1,354.00	$1,450.00	$1,471.90	$1,220.20	$1,485.10	$1,496.40	$1,249.56	$1,262.71	$1,174.33	$1,262.32	$1,288.13

[A]
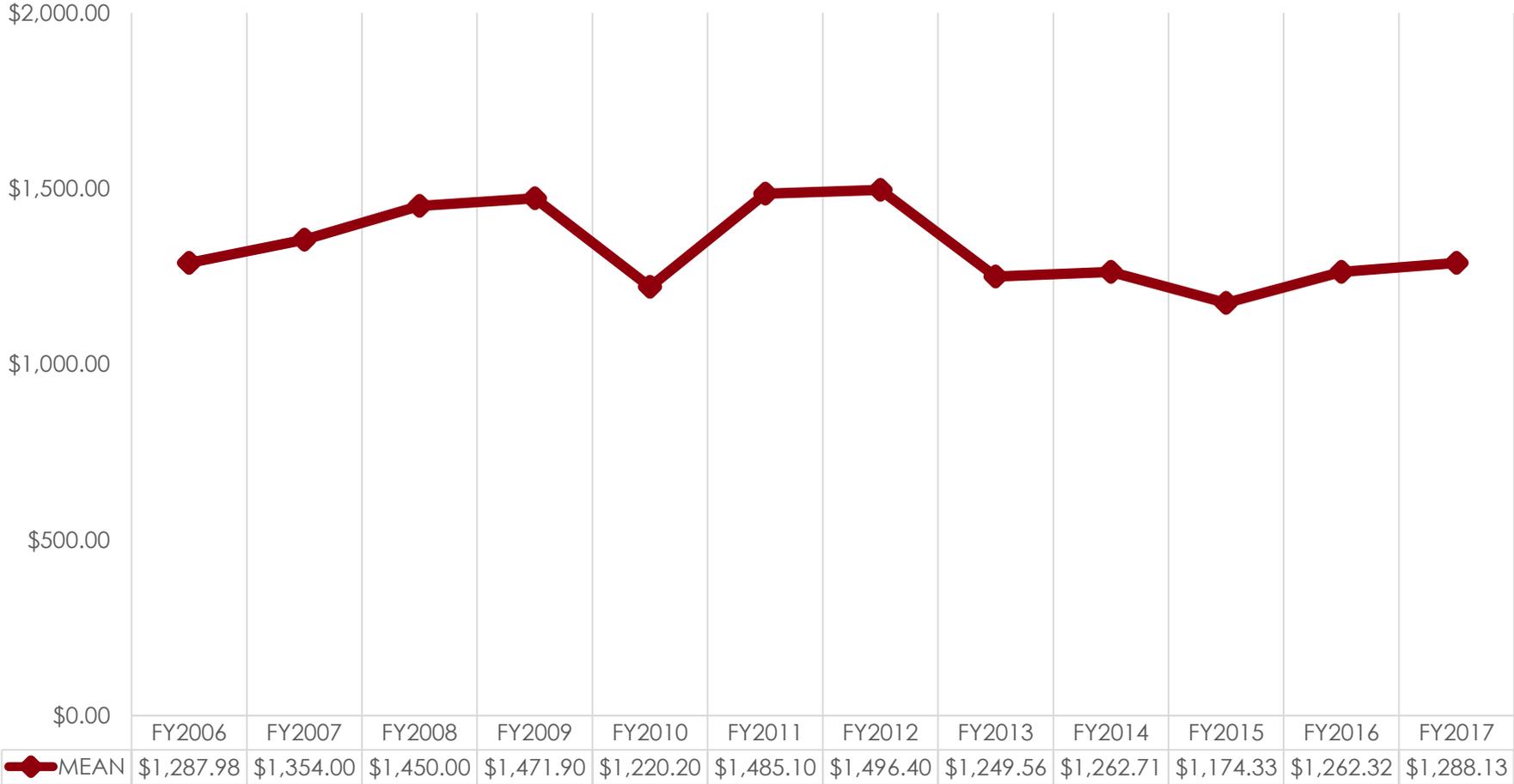
GUAM AIRPORT EXPENDITURE – FY2017 Tracking

[A]
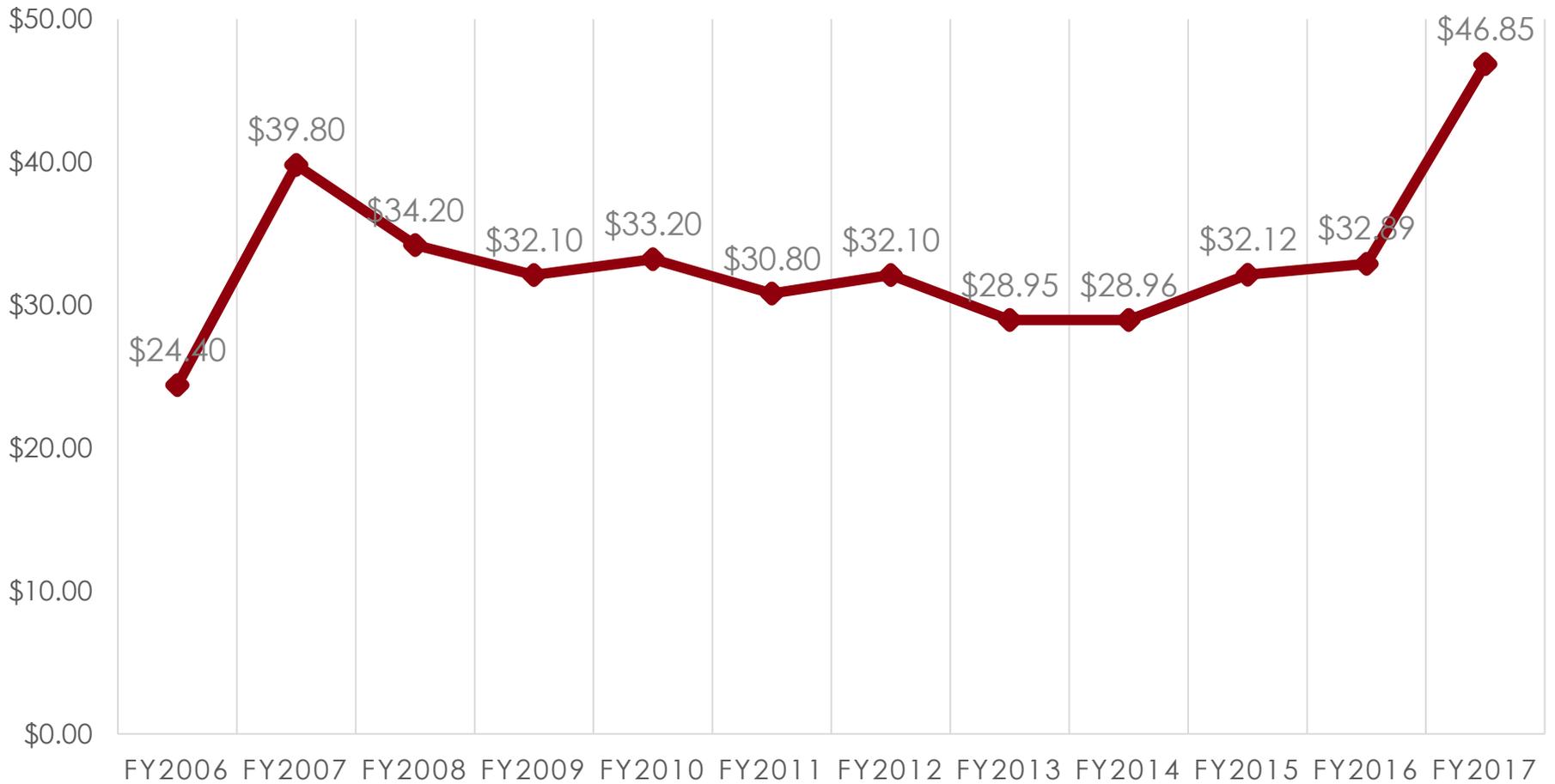
SECTION 4
VISITOR SATISFACTION BEHAVIOR

[A]

OVERALL SATISFACTION

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
Value	5.60	5.60	5.70	5.80	5.80	5.80	5.90	5.99	5.98	6.02	6.06	5.96

[A]
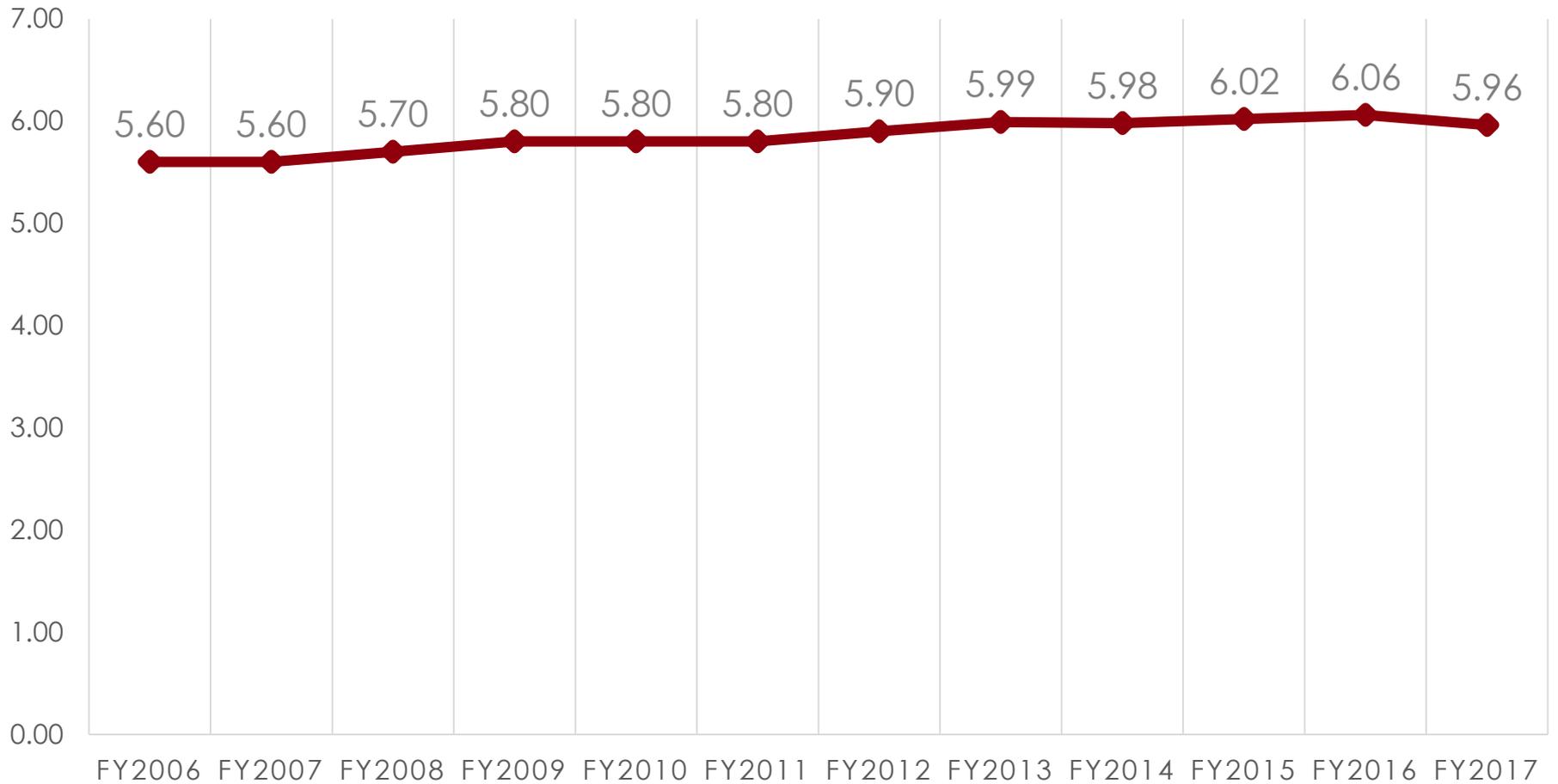
Guam was better than expected

A line chart titled with the values by fiscal year:

| Year	Value
FY2006	5.50
FY2007	5.40
FY2008	5.60
FY2009	5.70
FY2010	5.60
FY2011	5.80
FY2012	5.80
FY2013	5.88
FY2014	5.84
FY2015	5.94
FY2016	5.99
FY2017	6.01

[A]
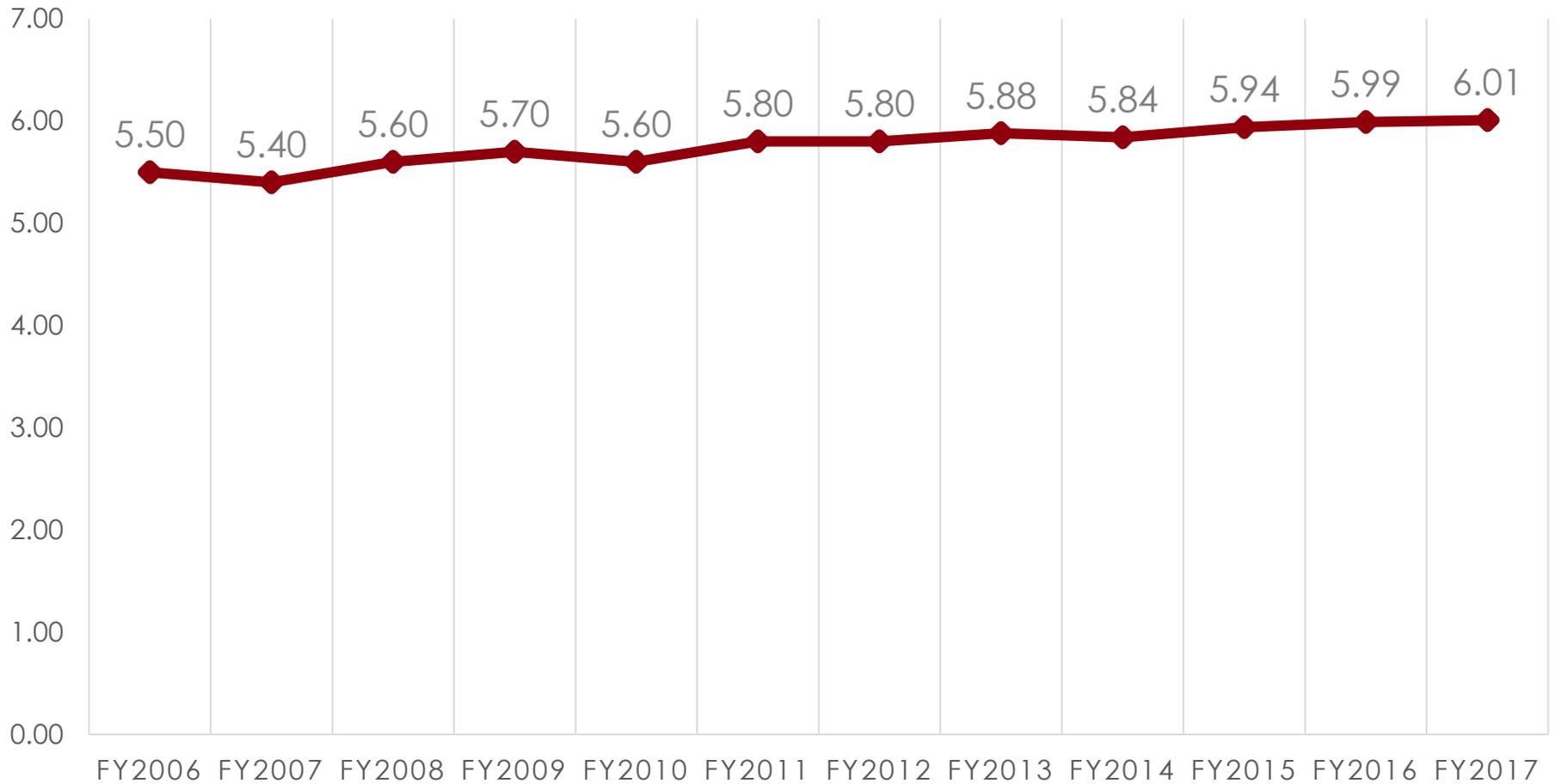
I had no communication problems

[A]
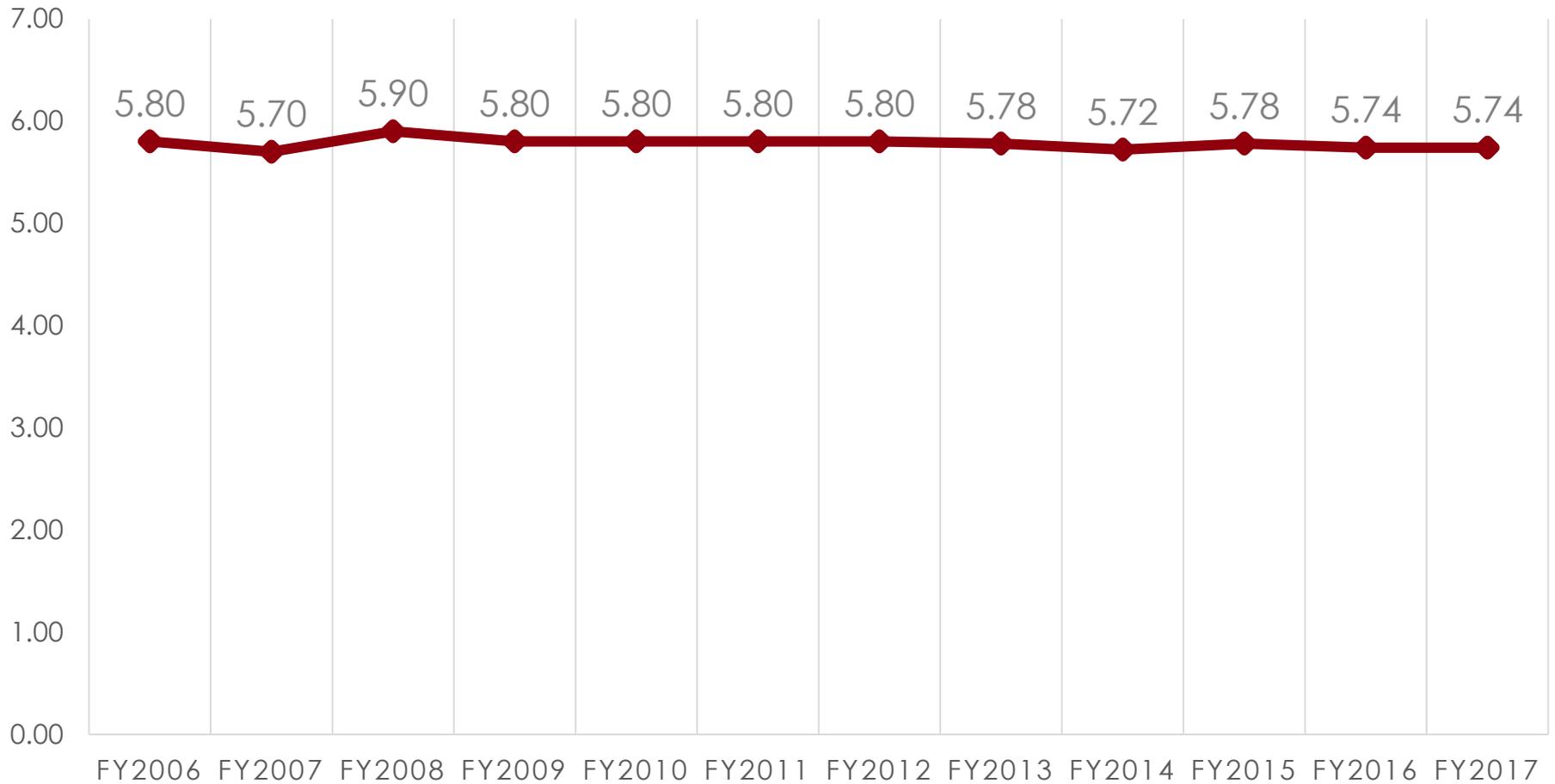
I will recommend Guam to friends
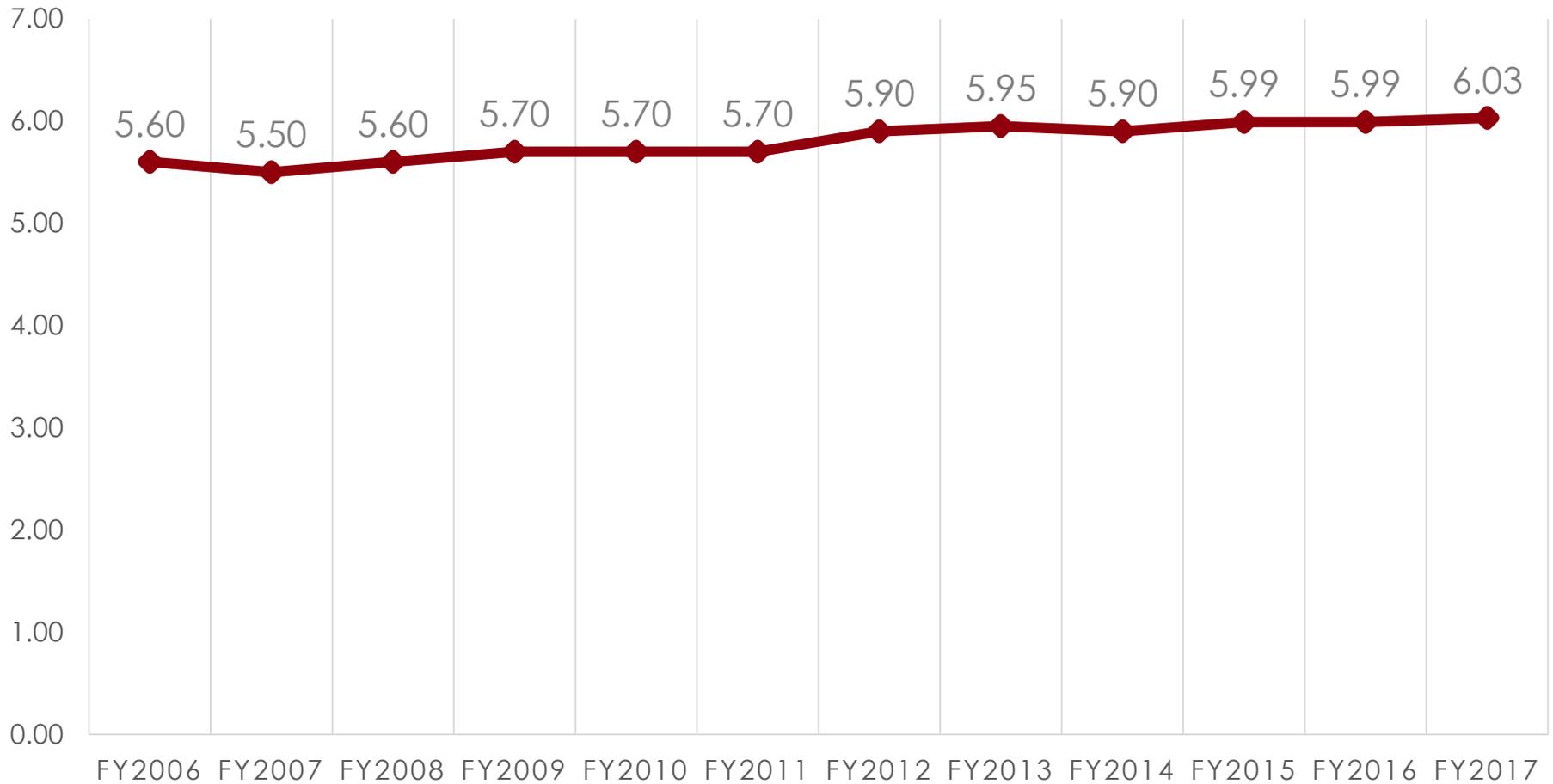
Sites on Guam were attractive

[A]

I plan to visit Guam again

A line chart titled "I plan to visit Guam again" showing values from FY2006 to FY2017:

- FY2006: 5.40
- FY2007: 5.40
- FY2008: 5.50
- FY2009: 5.60
- FY2010: 5.60
- FY2011: 5.60
- FY2012: 5.70
- FY2013: 5.77
- FY2014: 5.73
- FY2015: 5.83
- FY2016: 5.83
- FY2017: 5.91

[A]
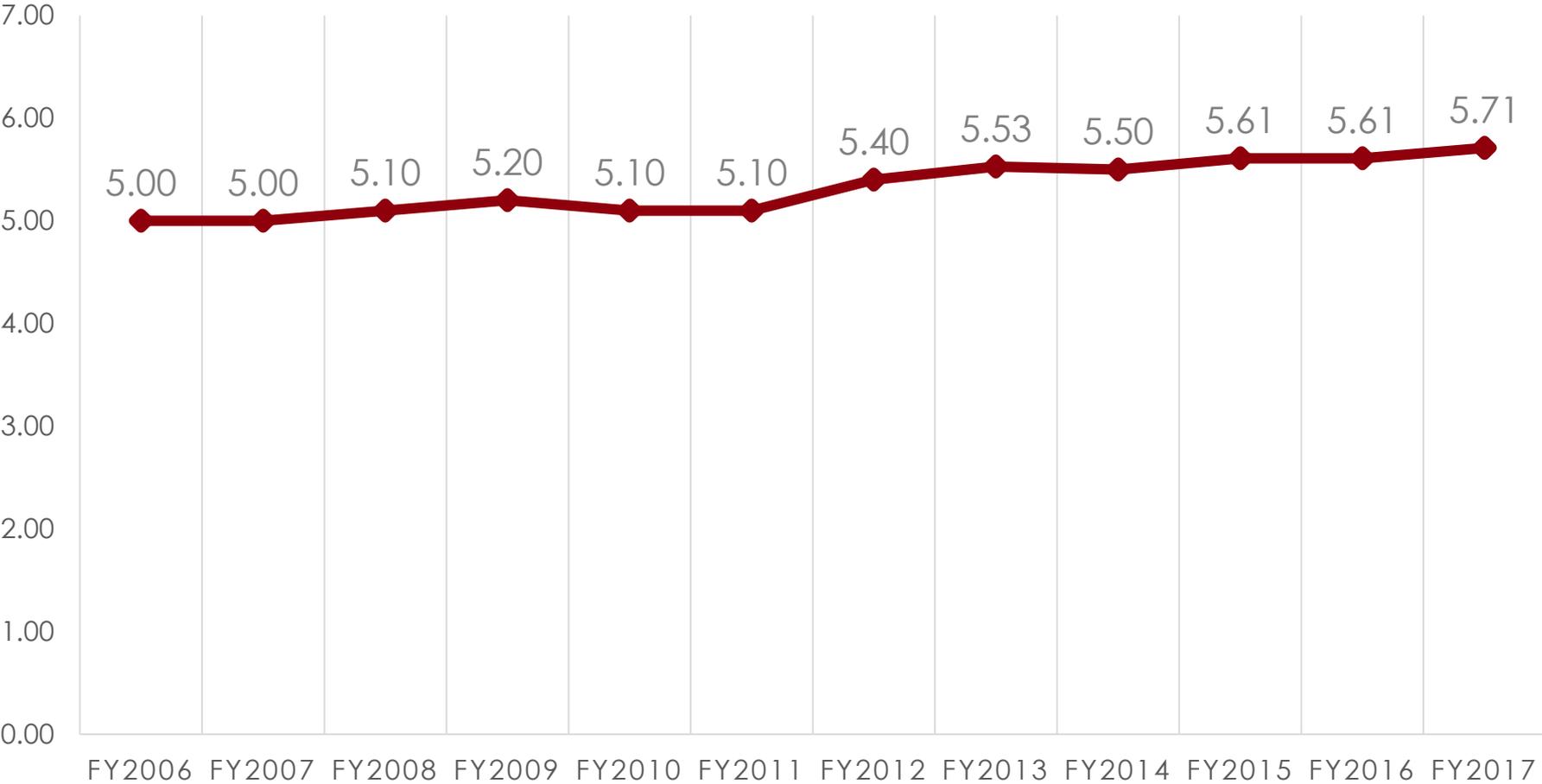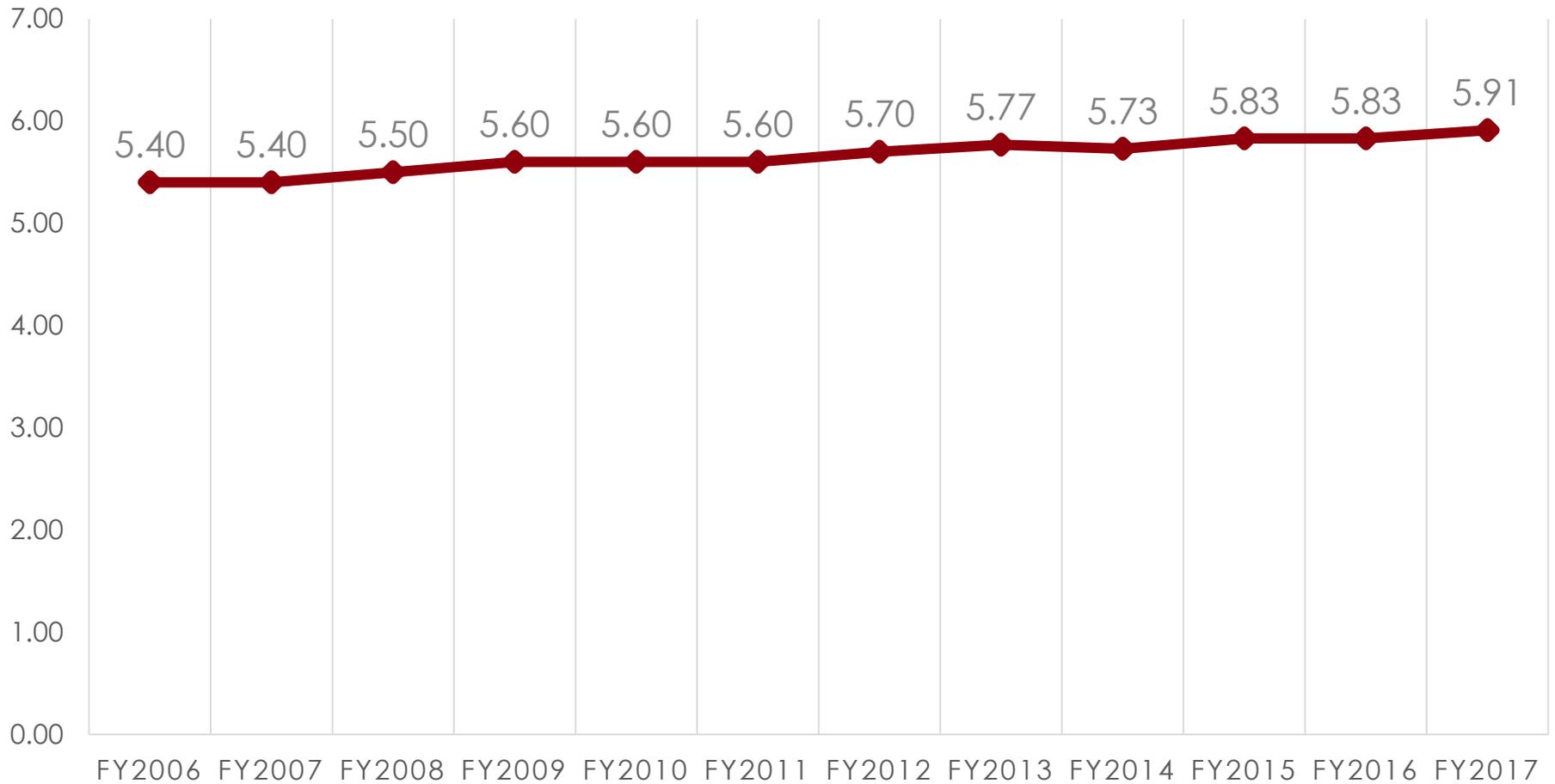
Not enough night time activities

[A]
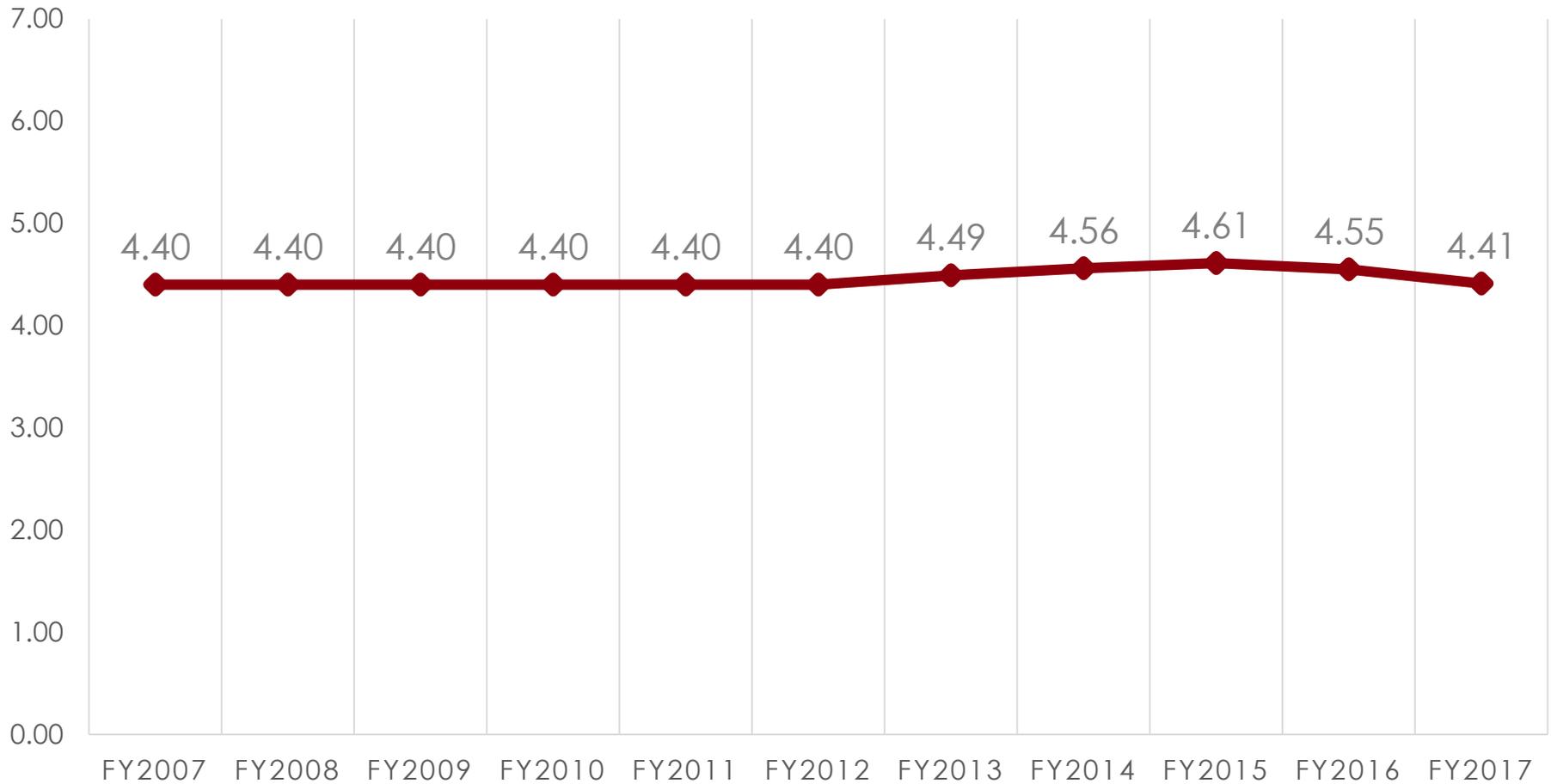
Tour guides were professional
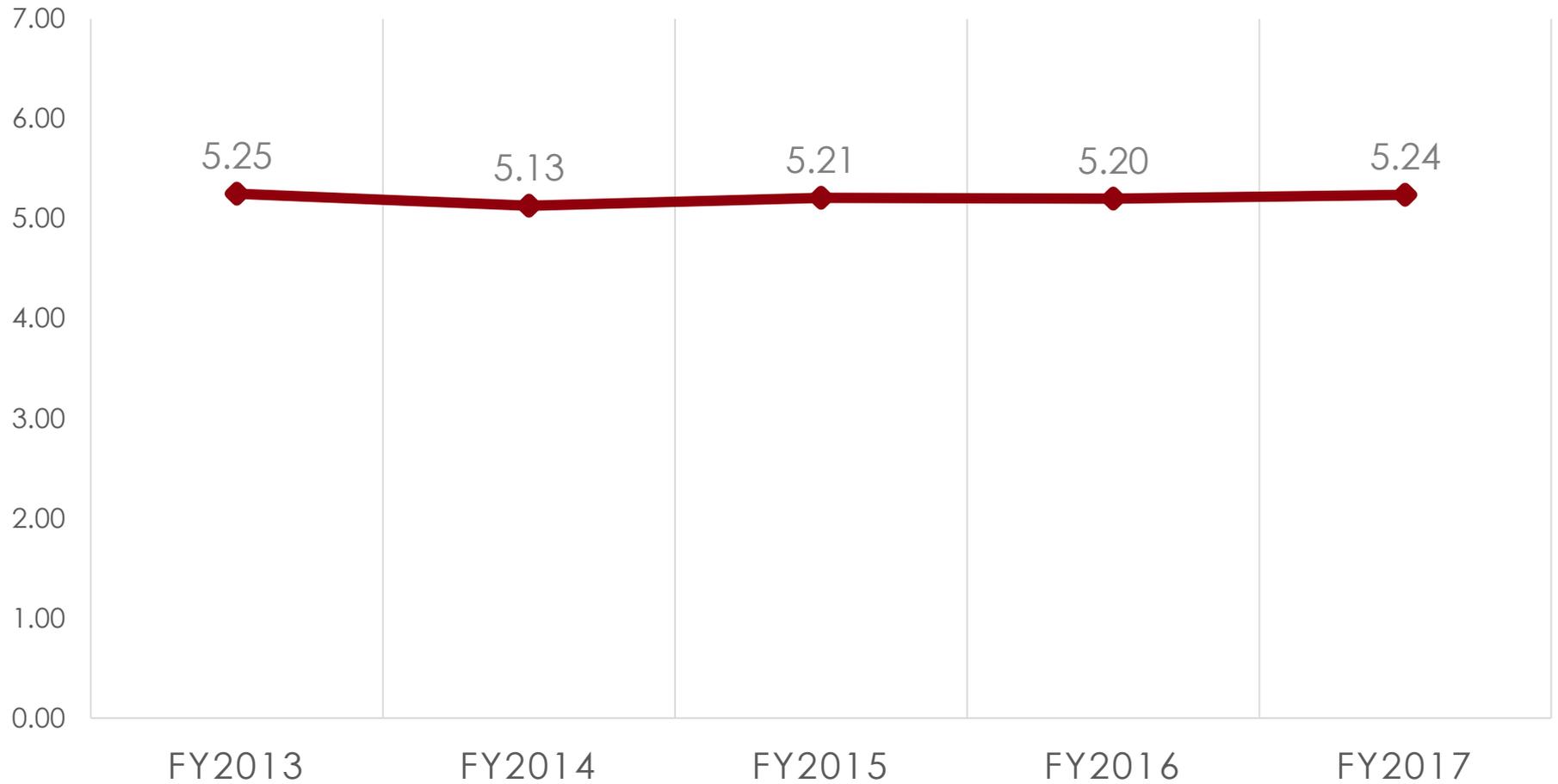
	FY2013	FY2014	FY2015	FY2016	FY2017
	5.21	5.11	5.17	5.15	5.18

[A]

Tour drivers were professional

[A]

Taxi drivers were professional
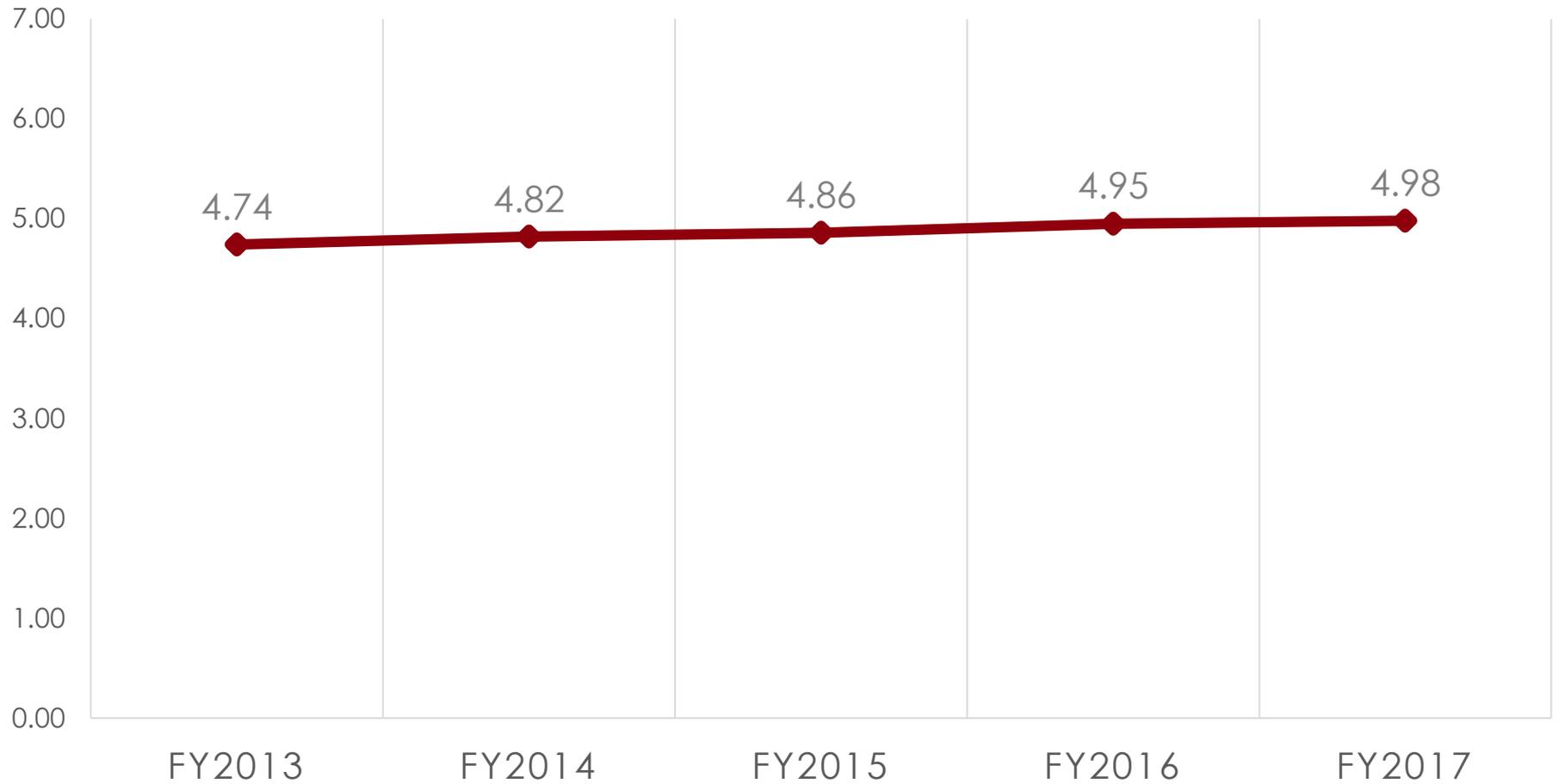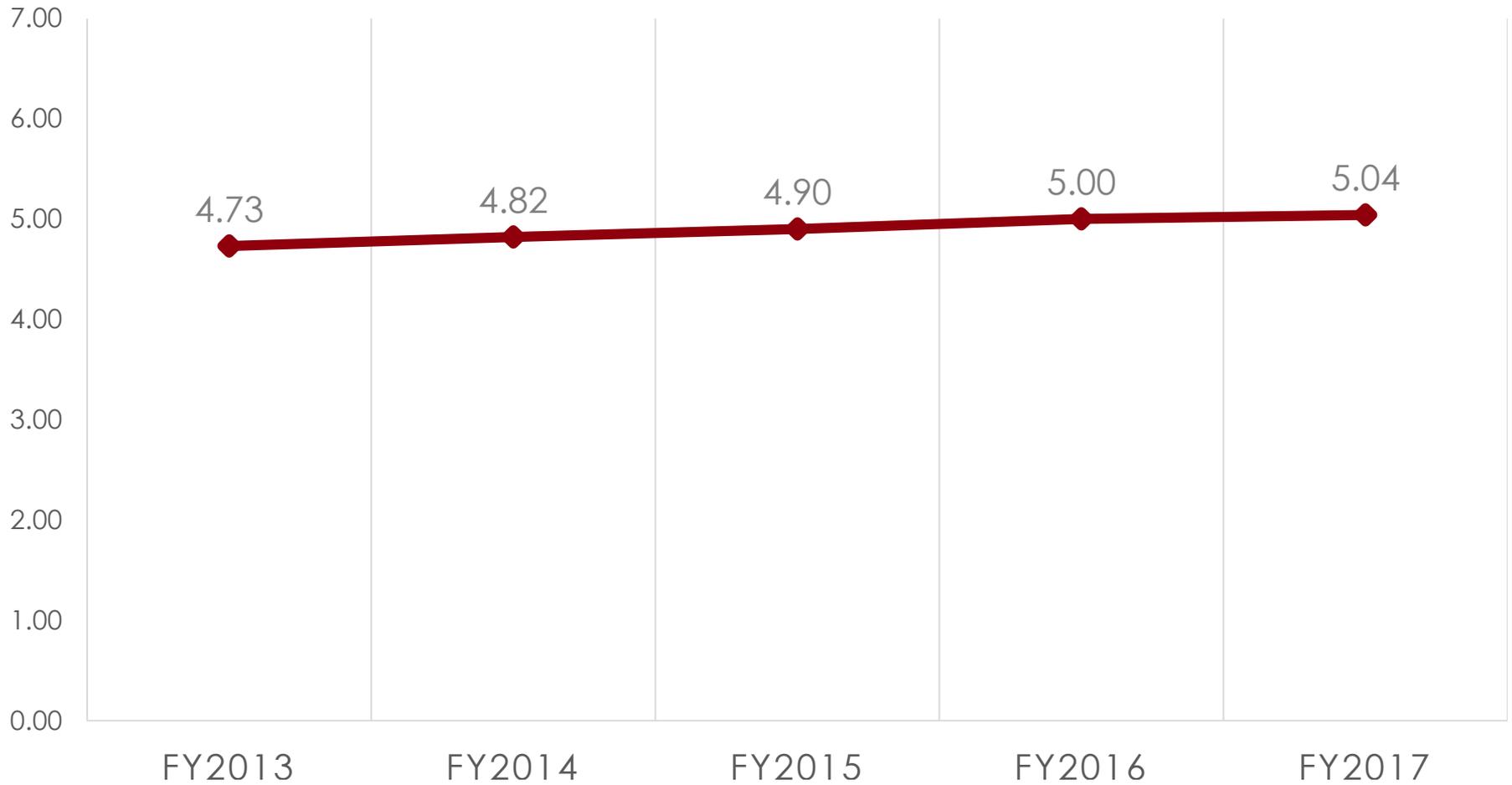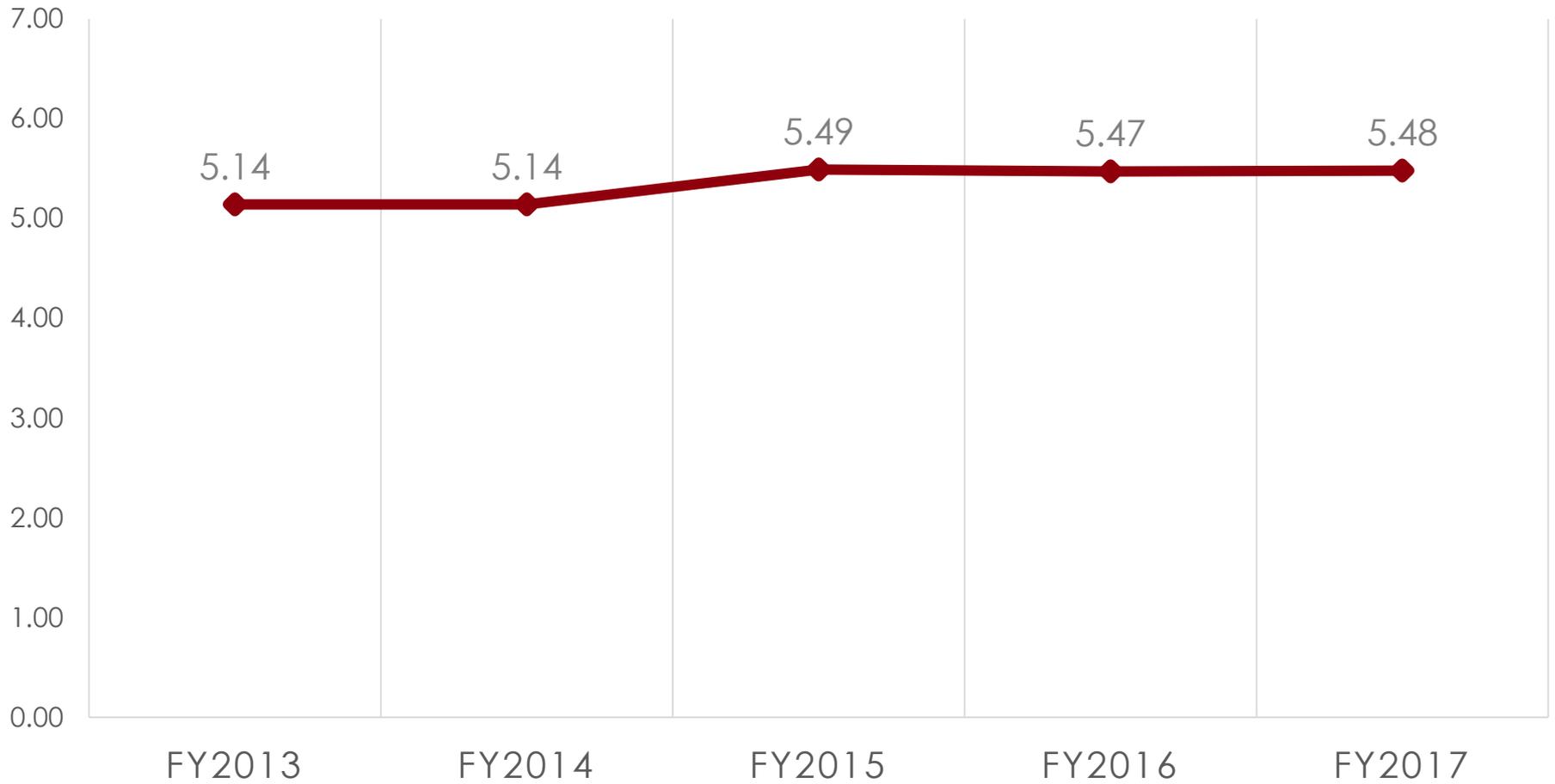
[A]

Taxis were clean

Line chart showing taxi cleanliness ratings from FY2013 to FY2017:
- FY2013: 4.73
- FY2014: 4.82
- FY2015: 4.90
- FY2016: 5.00
- FY2017: 5.04

[A]

Guam airport was clean

A line chart titled "Guam airport was clean" showing ratings from FY2013 to FY2017 on a scale of 0.00 to 7.00:
- FY2013: 5.14
- FY2014: 5.14
- FY2015: 5.49
- FY2016: 5.47
- FY2017: 5.48

[A]

Ease of getting around

FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
5.20	5.20	5.30	5.30	5.30	5.20	5.30	5.44	5.48	5.45	5.50	5.35

[A]

Safety walking around at night

[A]

Price of things on Guam

[A]
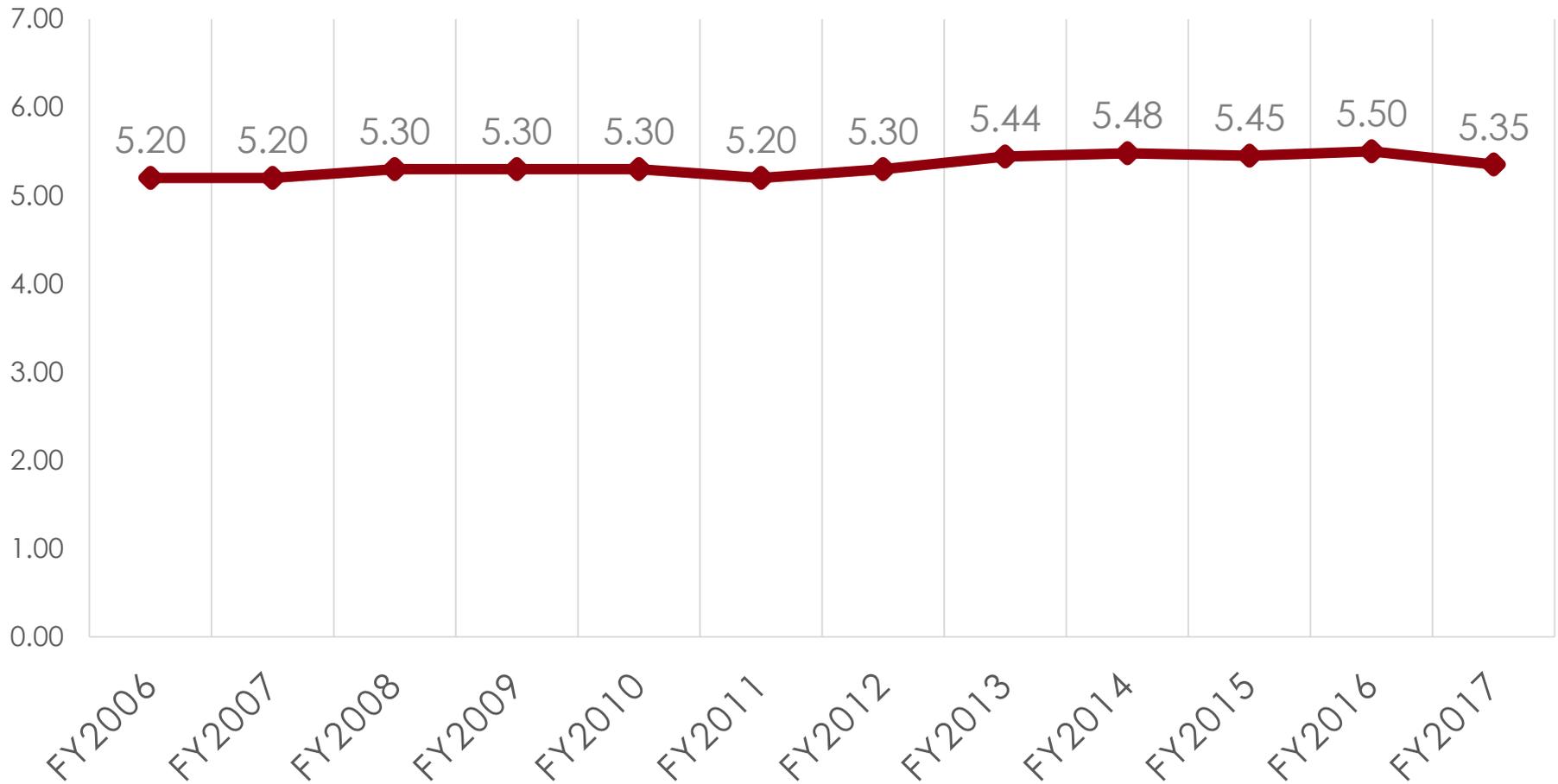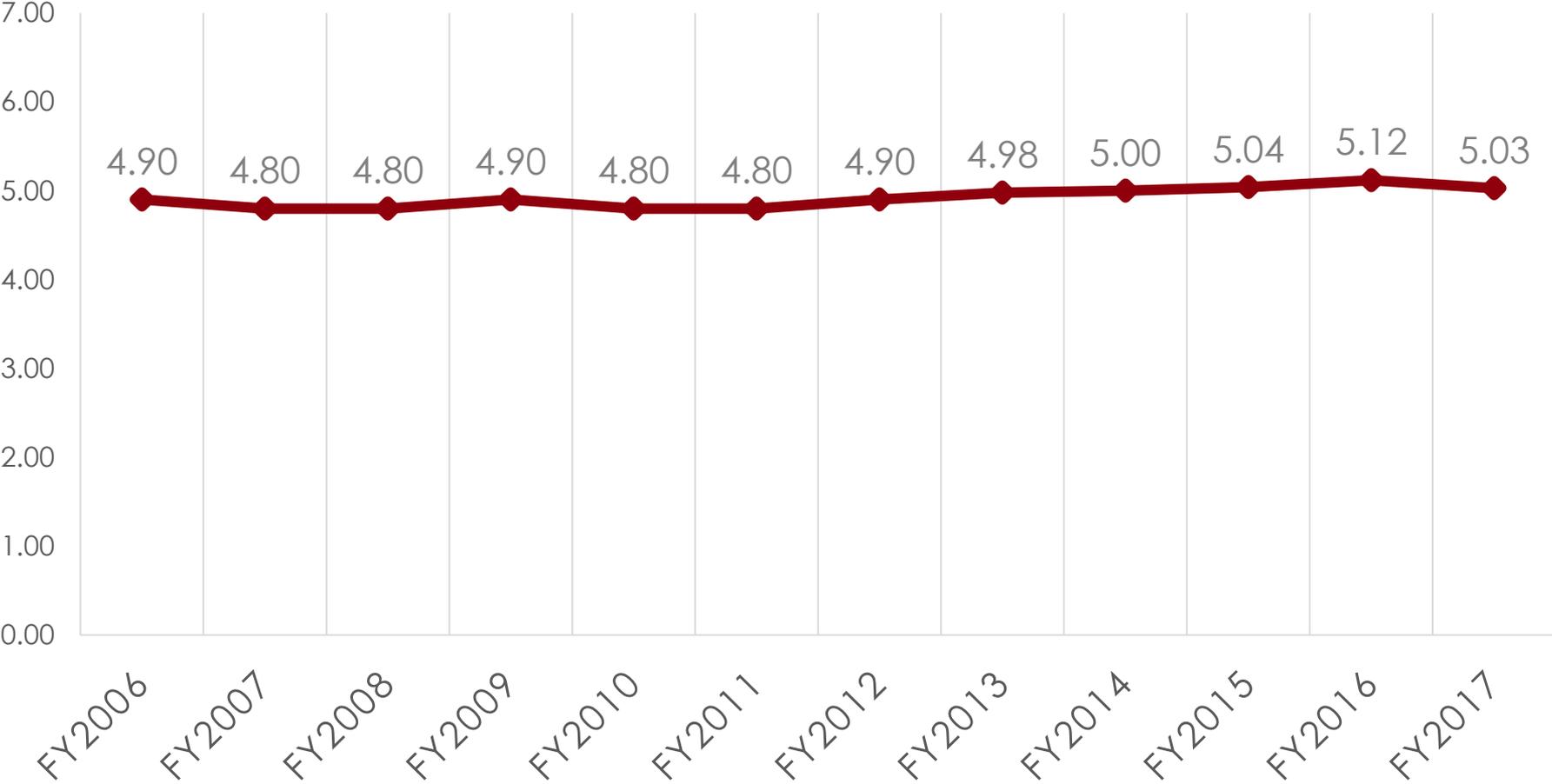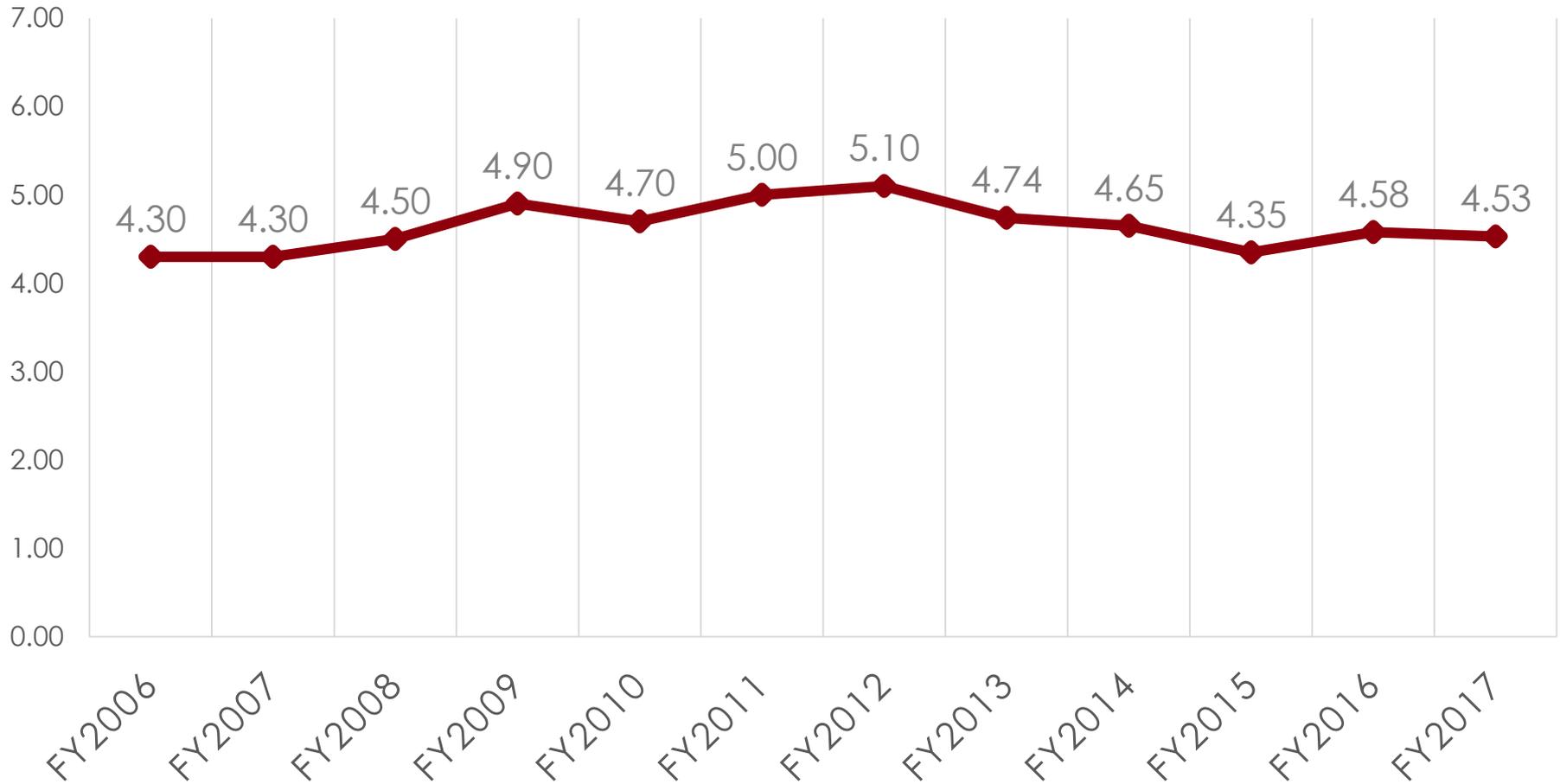
Quality/ Cleanliness- beach, ocean

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
Value	5.50	5.40	5.40	5.50	5.50	5.50	5.60	5.68	5.63	5.73	5.75	5.67

[A]
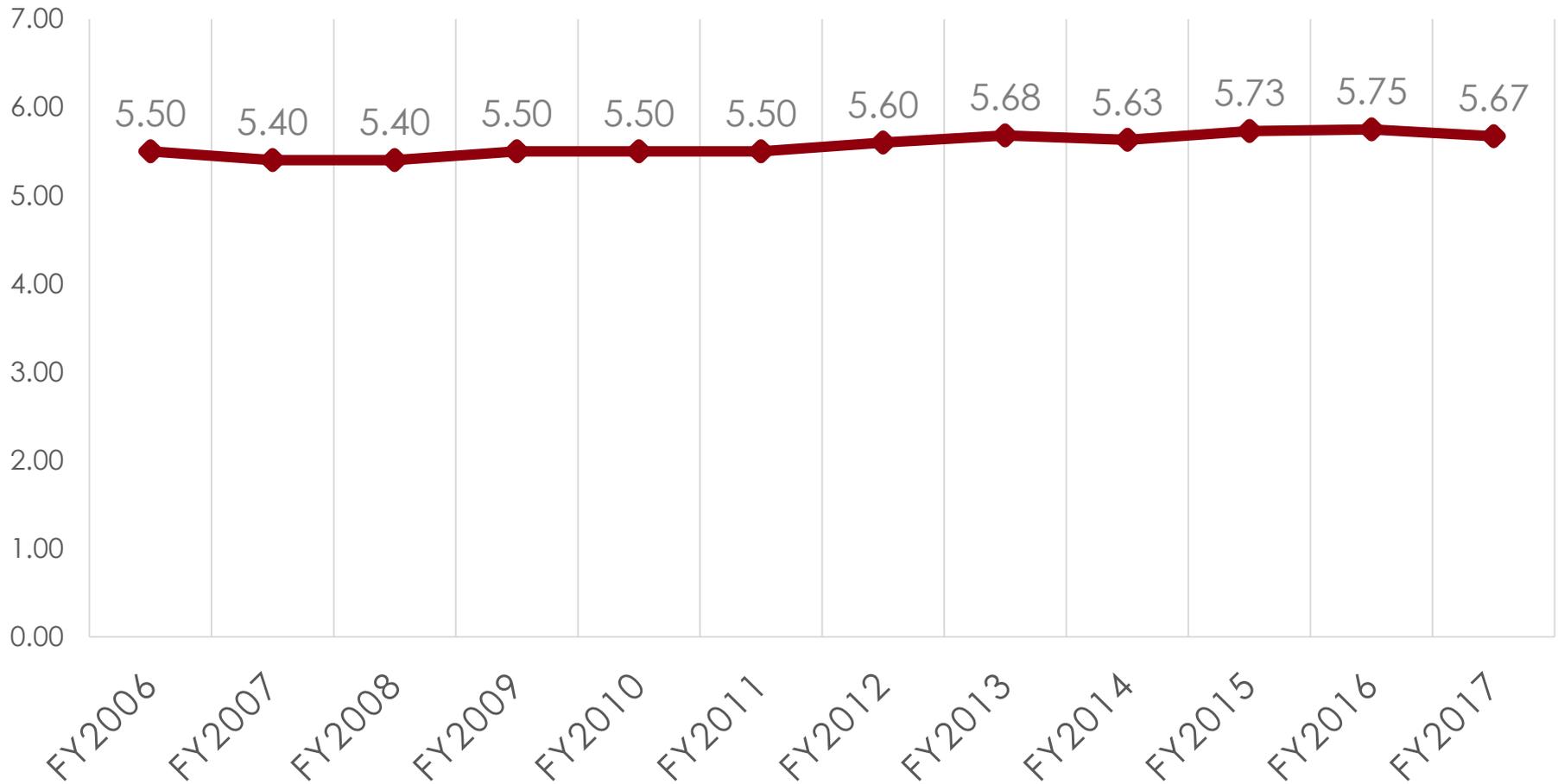
Quality/ Cleanliness- air, sky

	FY2013	FY2014	FY2015	FY2016	FY2017
Value	5.64	5.61	5.66	5.72	5.62

[A]
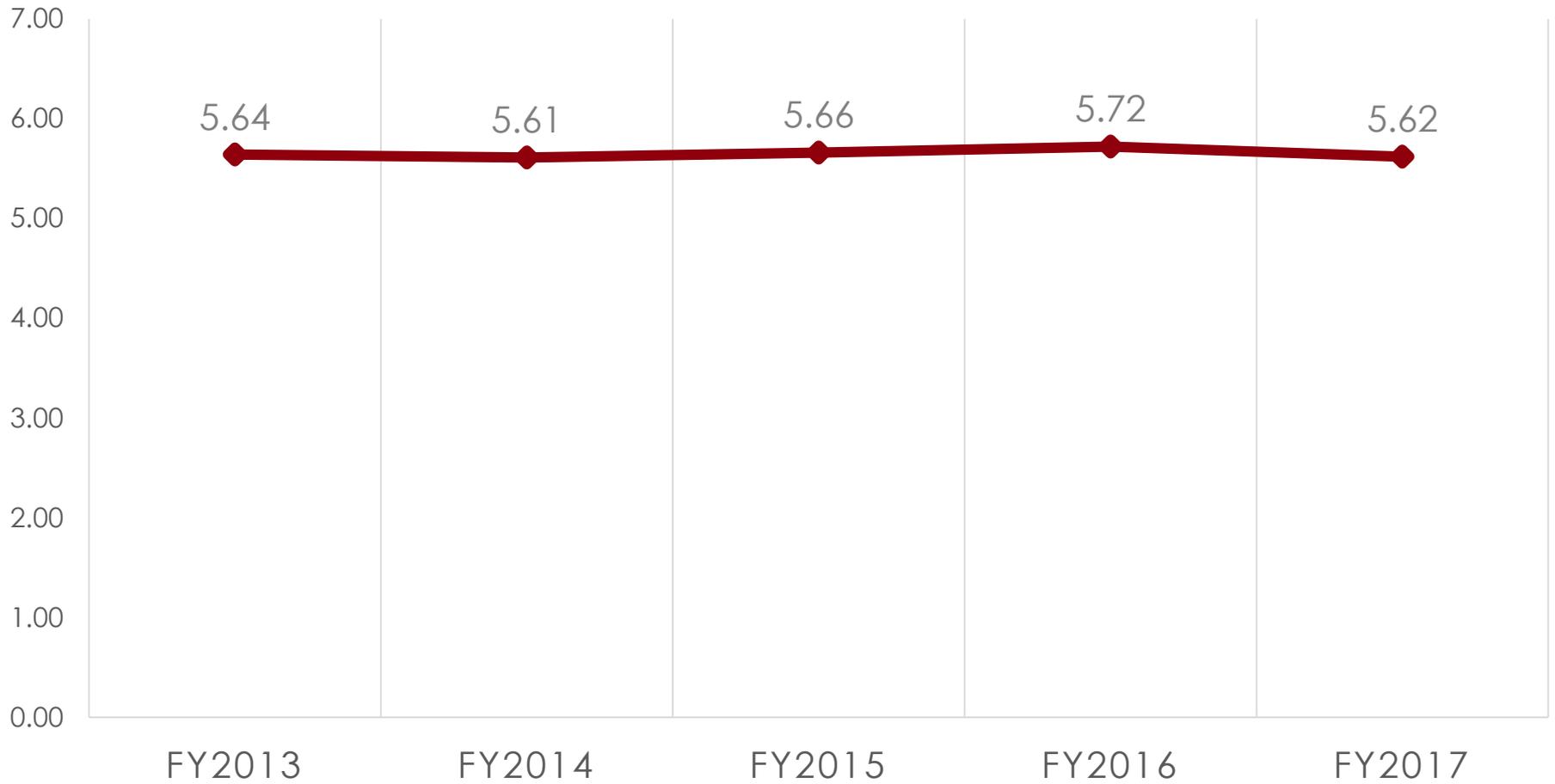
Quality/ Cleanliness- parks

[A]
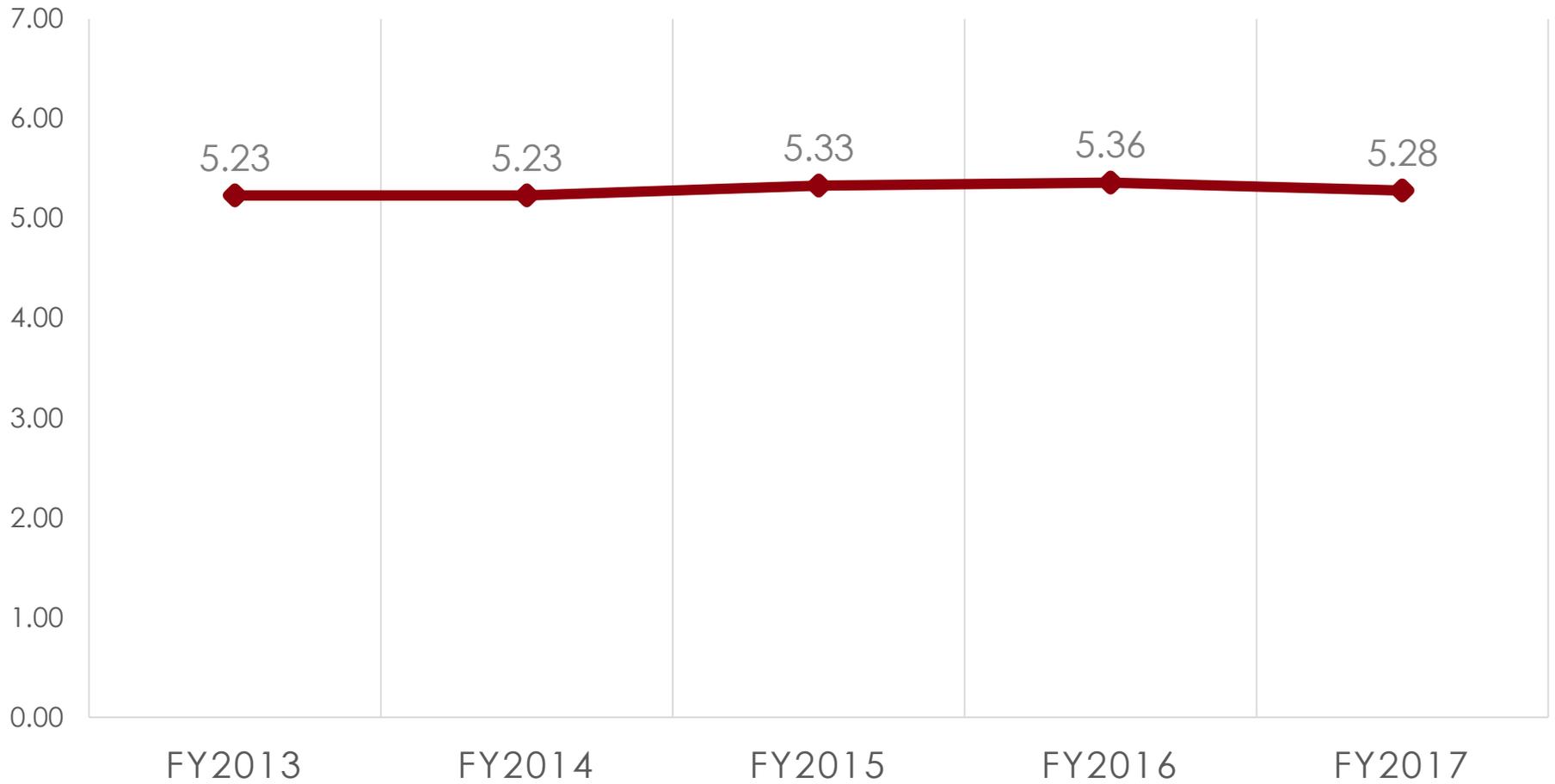
Quality- landscape Tumon

[A]

Quality- landscape Guam

6.05 6.02 6.05 6.14 6.07

FY2013 FY2014 FY2015 FY2016 FY2017

[A]

Quality- ground handler

	FY2013	FY2014	FY2015	FY2016	FY2017
Value	5.25	5.31	5.40	5.41	5.35

[A]
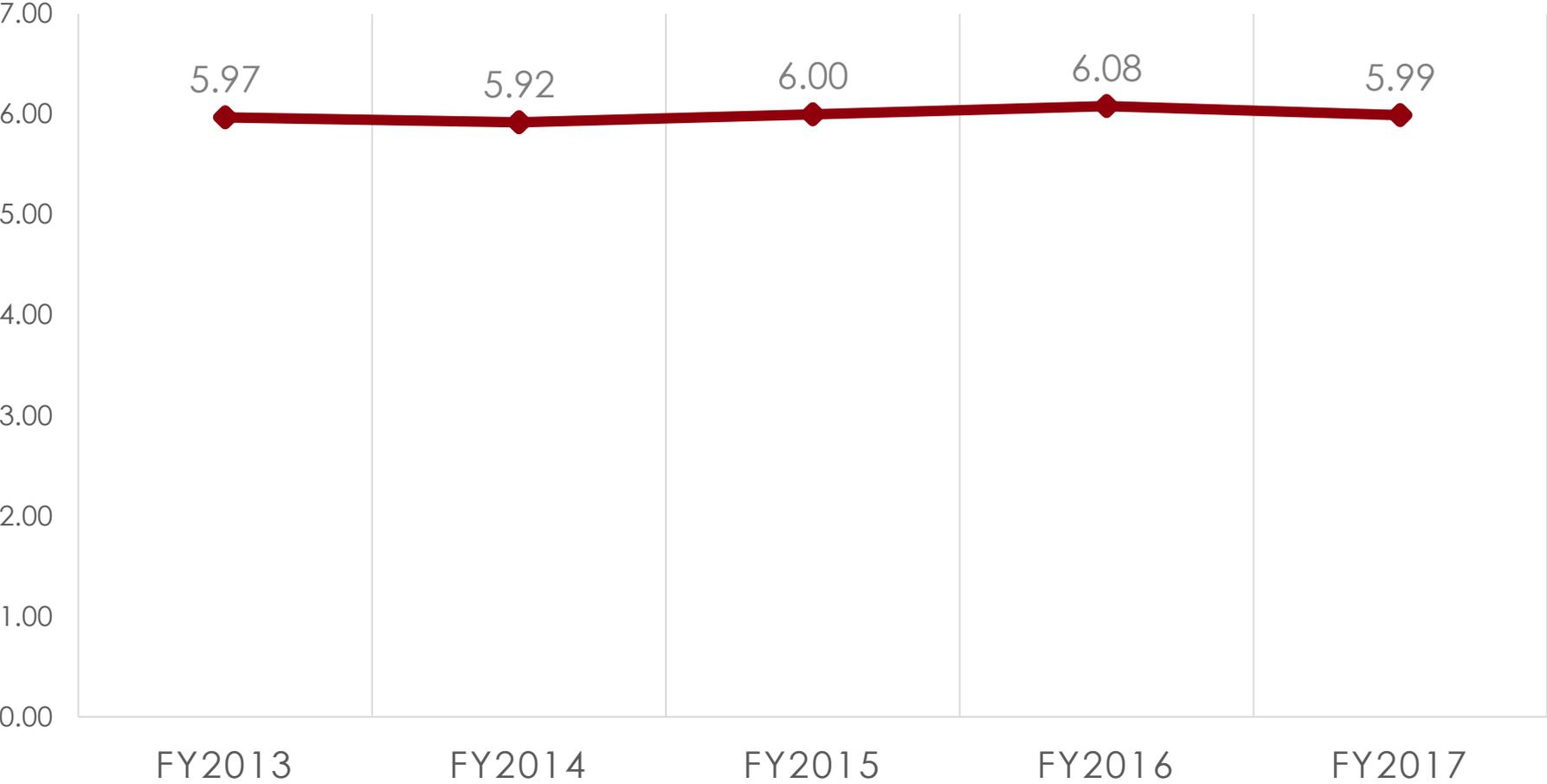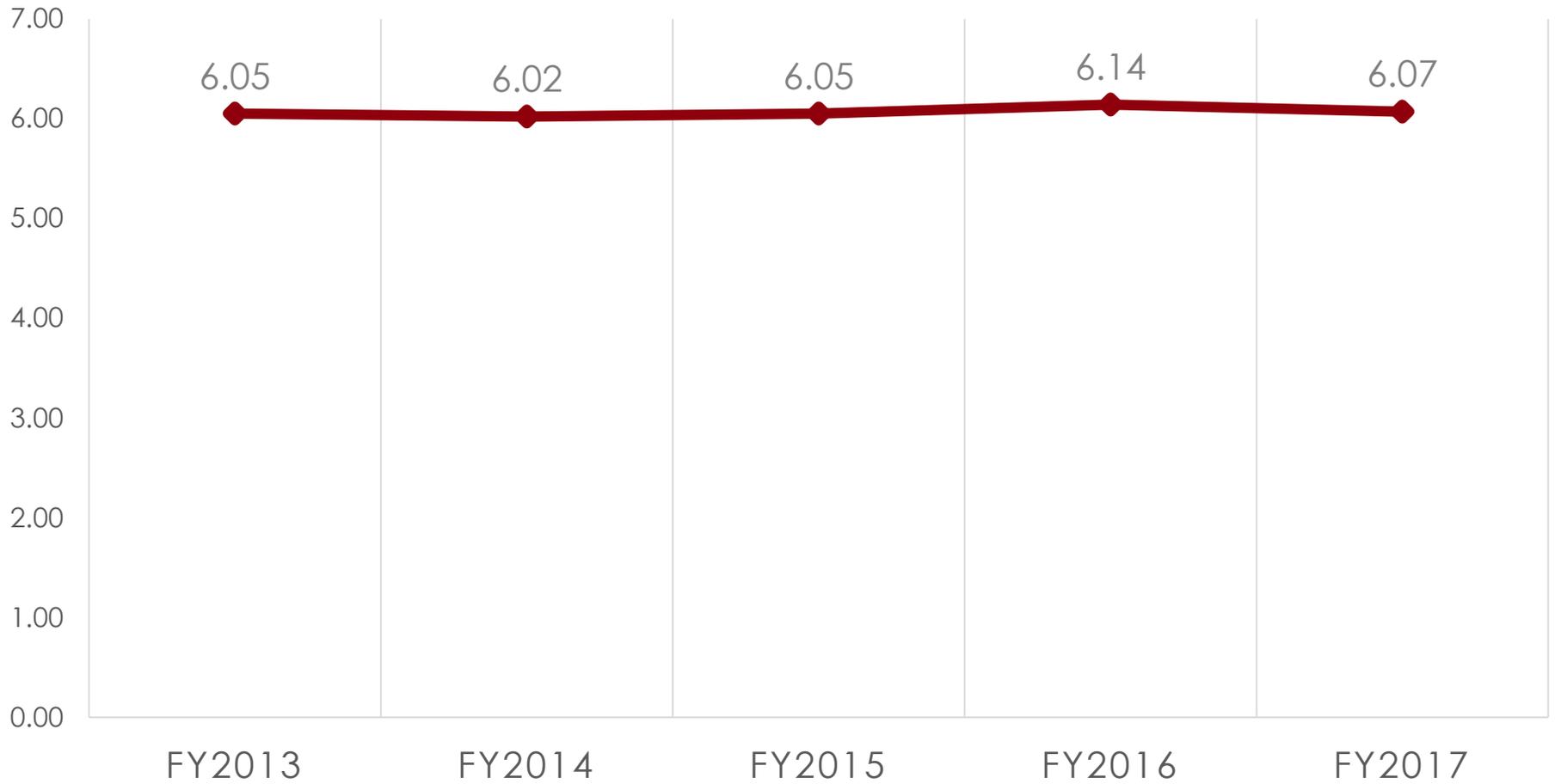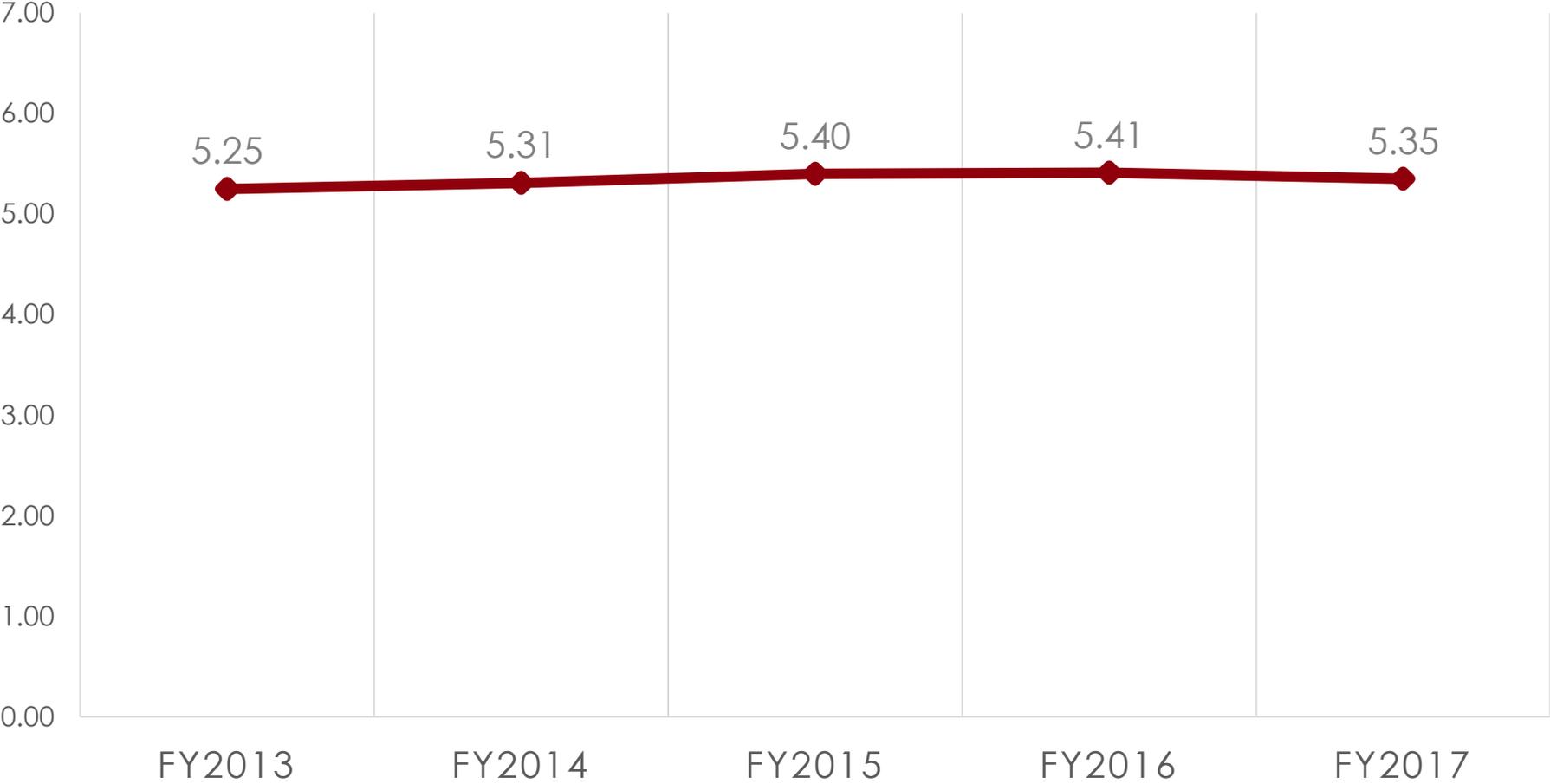
Quality/ Cleanliness- transportation vehicle

[A]
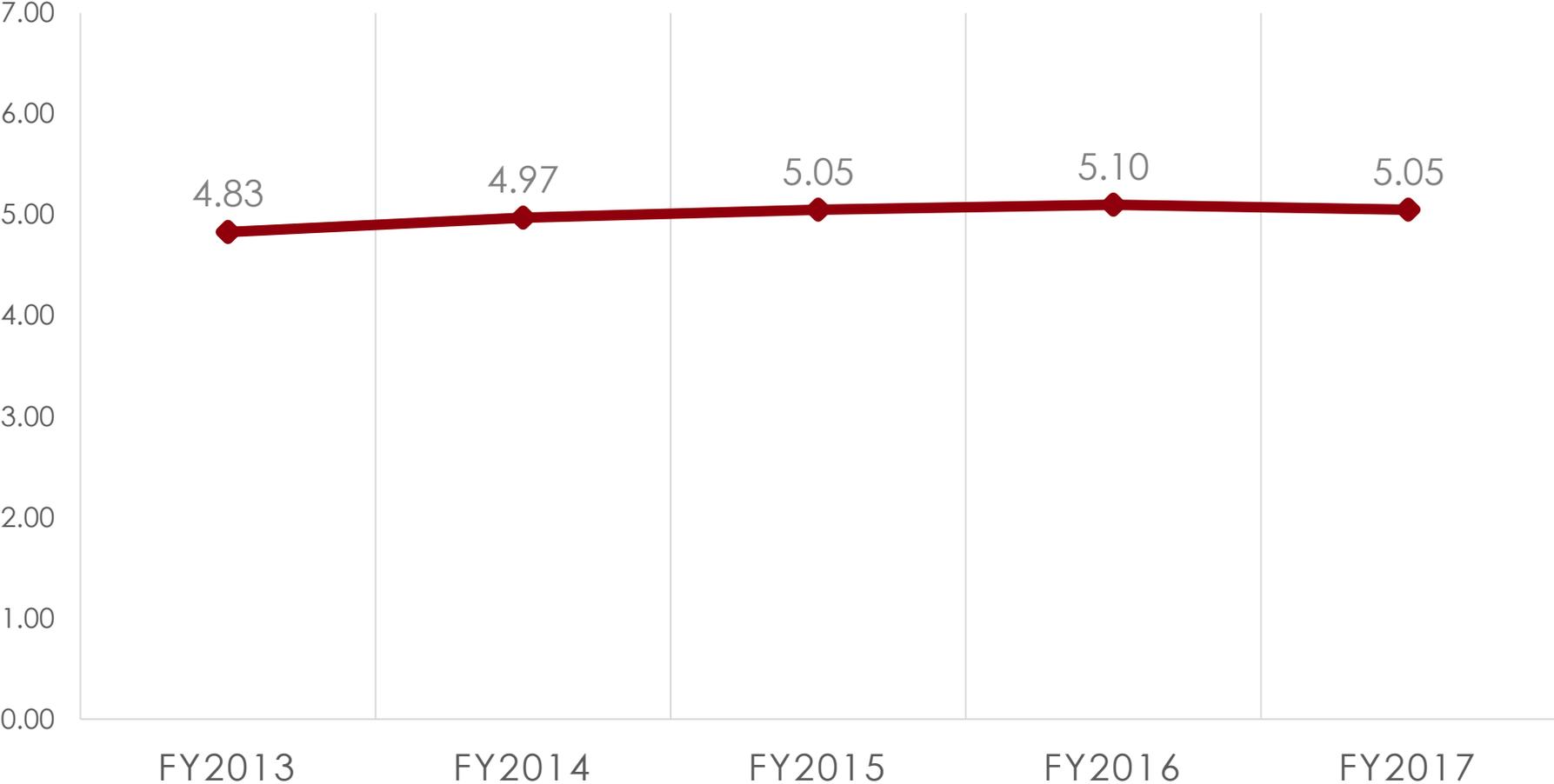
ACCOMMODATIONS
OVERALL SATISFACTION

A line chart showing overall satisfaction from FY2006 to FY2017:
- FY2006: 4.70
- FY2007: 4.70
- FY2008: 4.90
- FY2009: 4.90
- FY2010: 4.90
- FY2011: 5.00
- FY2012: 5.00
- FY2013: 5.04
- FY2014: 5.05
- FY2015: 5.09
- FY2016: 5.17
- FY2017: 5.12

[A]
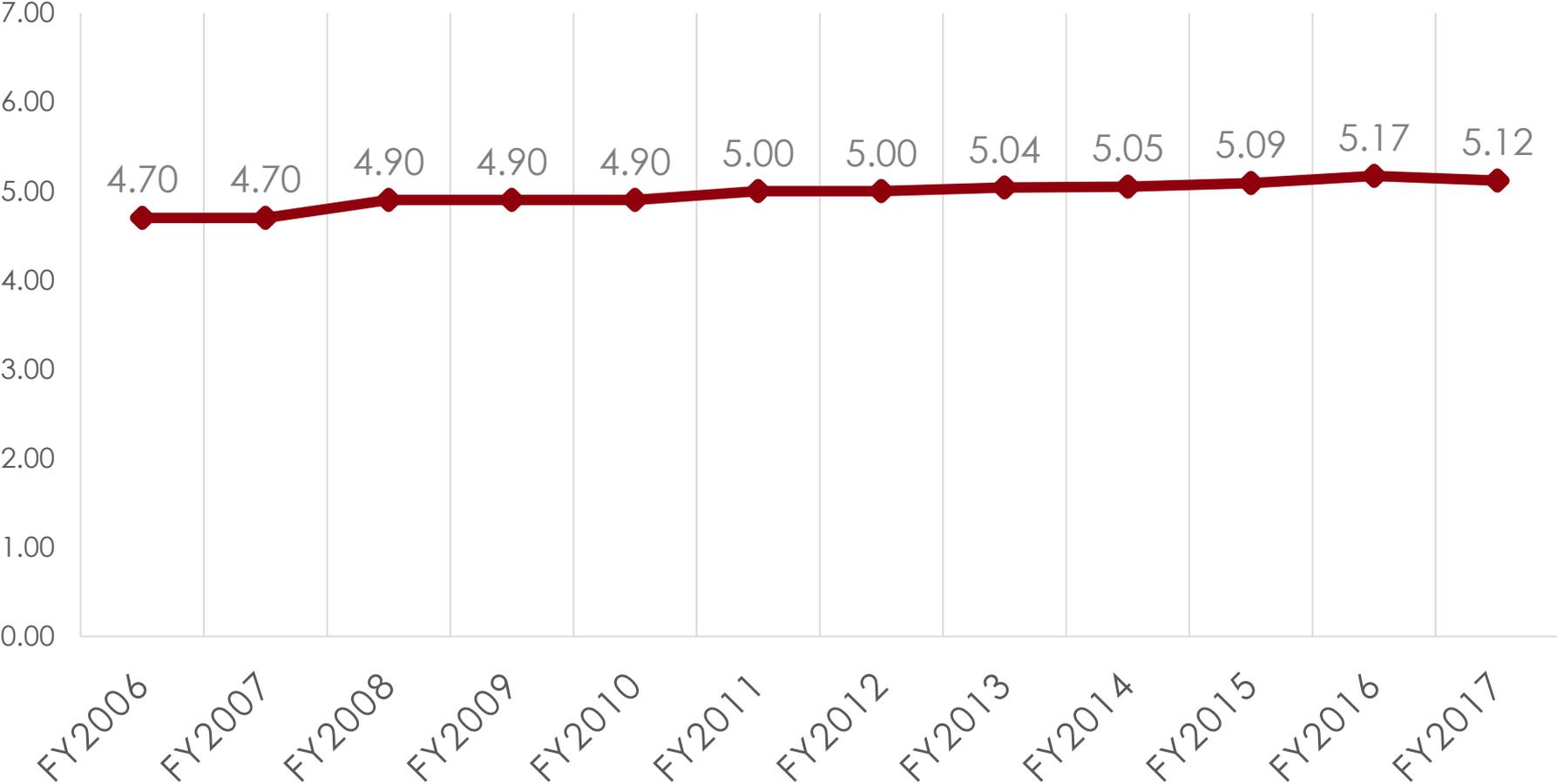
ACCOMMODATIONS –
Satisfaction by Category

Very Satisfied (Top Box) values: Room 25%, View 30%, Furnishings 20%, Cleanliness 20%, Food- Quality 18%, Food- Quantity 23%, Friendly/ Prof 34%, Service 28%, Value 24%

MEAN (7pt Scale) values: Room 5.17, View 5.18, Furnishings 4.95, Cleanliness 4.85, Food- Quality 4.88, Food- Quantity 5.03, Friendly/ Prof 5.58, Service 5.36, Value 5.33

Legend: ■ Very Satisfied (Top Box) ●— MEAN (7pt Scale)

[A]
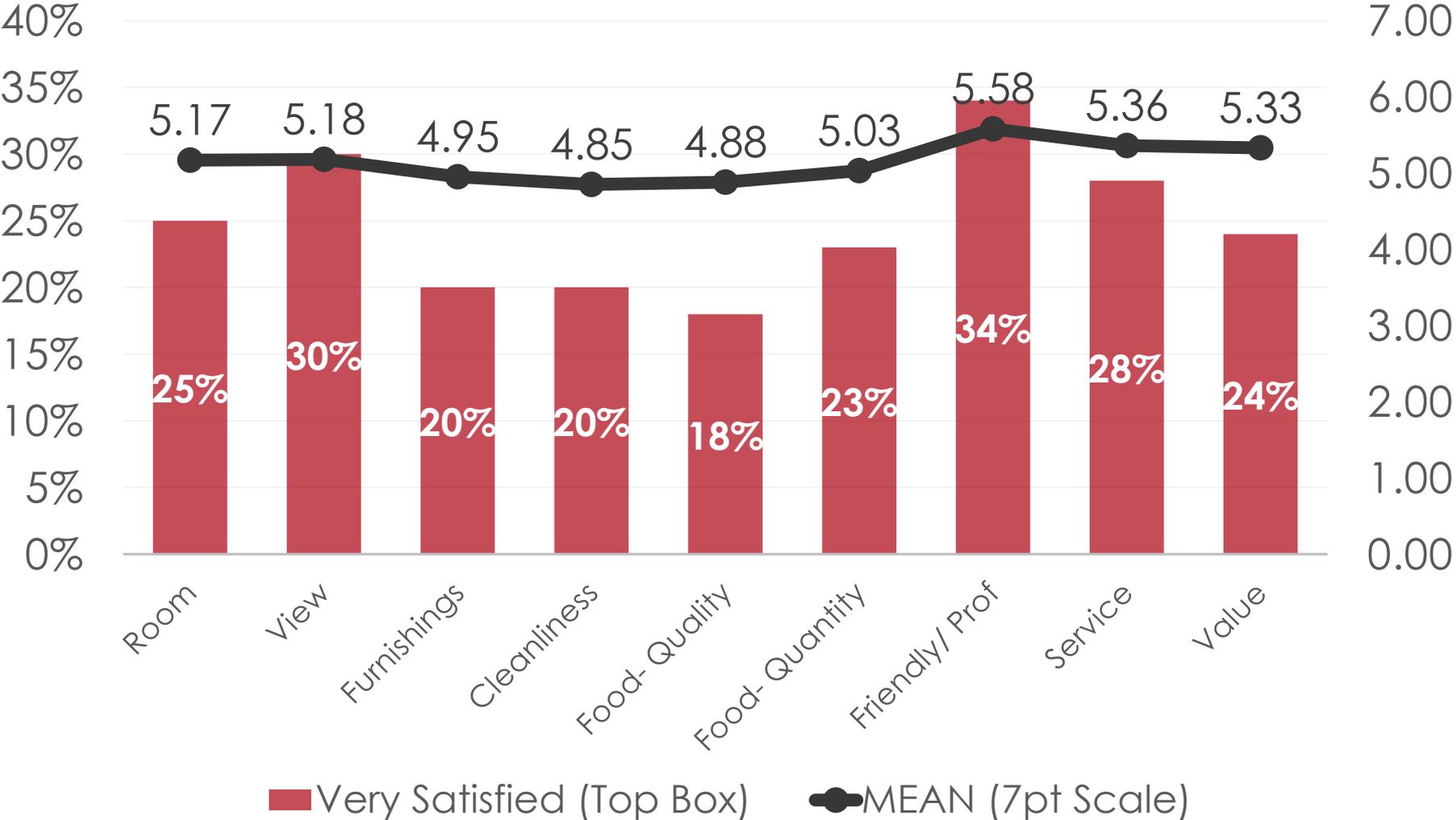
DINING EXPERIENCE (Outside Hotel) –
Satisfaction by Category

Furnishings: 23%, 5.40
Cleanliness: 16%, 5.05
Food-Quality: 23%, 5.34
Food-Quantity: 30%, 5.43
Staff: 31%, 5.59
Service: 28%, 5.52
Value: 25%, 5.54

Legend: Very Satisfied (Top Box) ● MEAN (7pt Scale)

[A]

Shopping Malls/ Stores (Top Responses)

Store	Percentage
ABC Store	96%
DFS Galleria	74%
K-Mart	65%
JP Super	64%
The Plaza	61%
Micro Mall	56%
Guam Prem Outlet	53%
Tumon Sands	29%
Macys	27%
Ross	22%

[A]
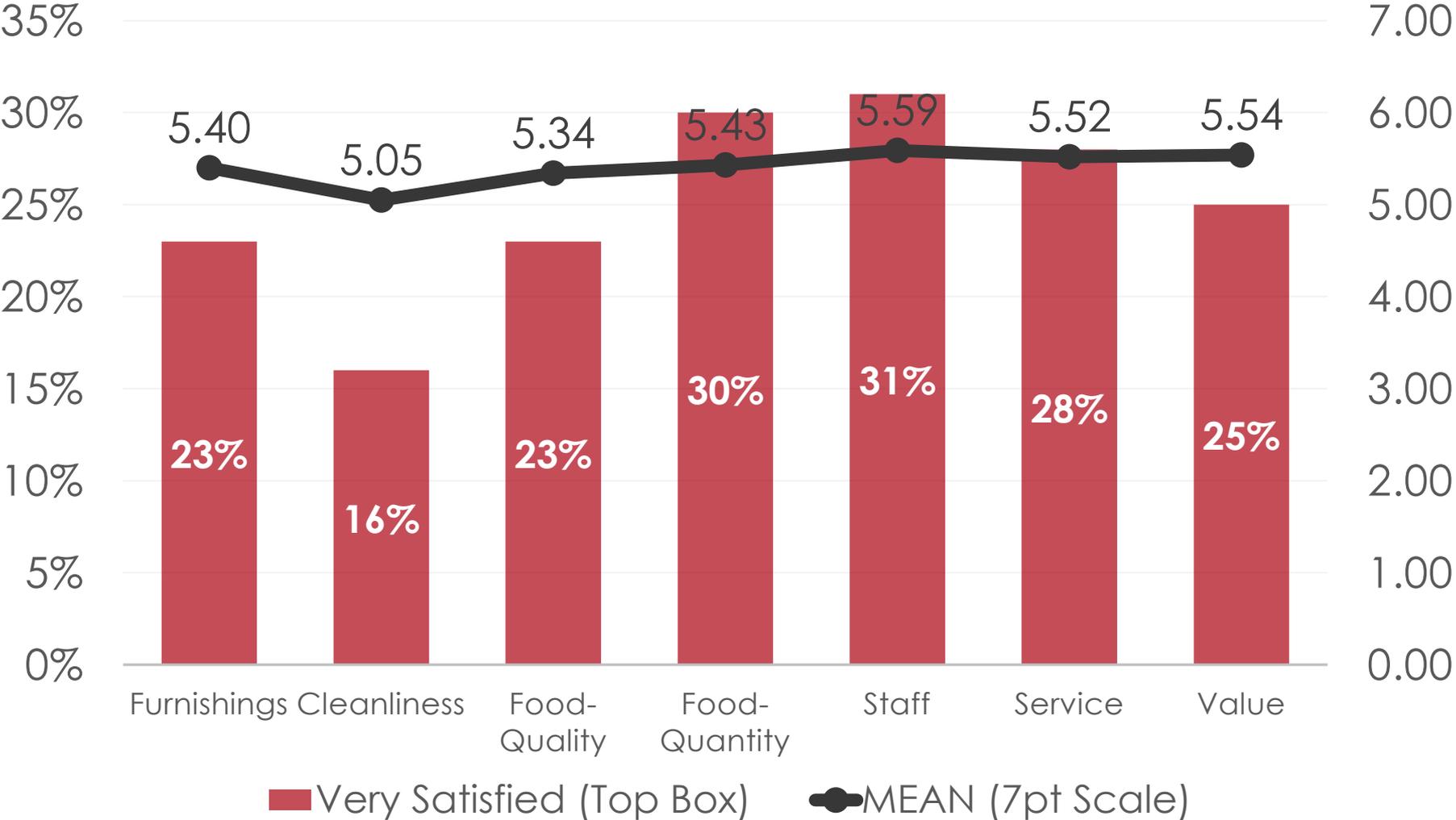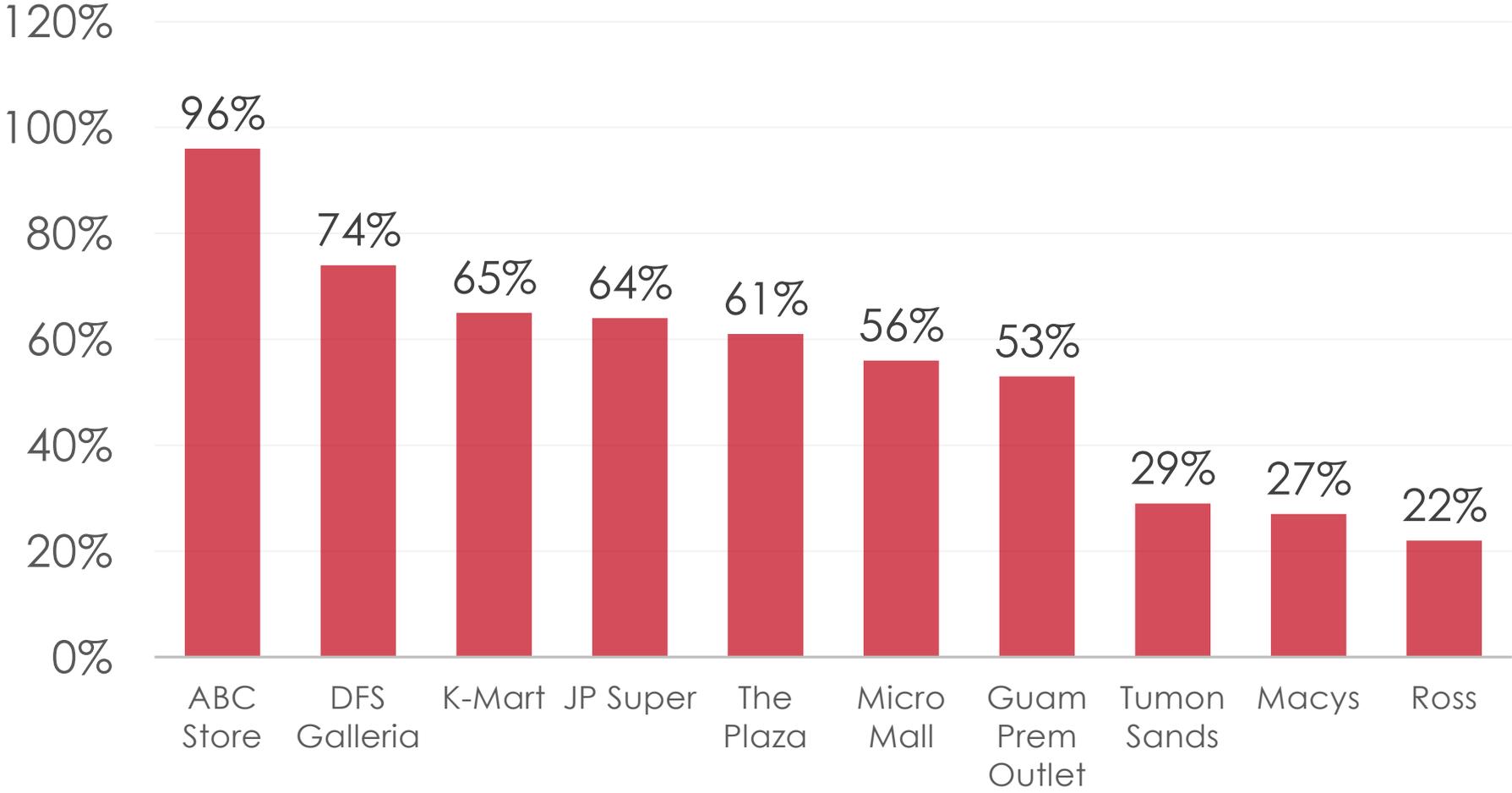
Shopping Malls/ Stores (Top Responses)

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
ABC	94%	95%	96%	95%	94%	94%	95%	95%	95%	96%	96%	96%
DFS	95%	95%	94%	92%	89%	91%	90%	87%	85%	79%	74%	74%
The Plaza	54%	56%	60%	60%	57%	62%	66%	67%	69%	68%	62%	61%
JP Super	Not top6	Not top6	Not top6	Not top6	Not top6	63%	71%	67%	65%	66%	65%	64%
K-Mart	55%	58%	66%	61%	64%	64%	62%	66%	66%	70%	69%	65%
Micro Mall	66%	70%	72%	71%	65%	64%	65%	64%	60%	55%	53%	56%
Prem Outlet	59%	56%	63%	64%	58%	Not top6	Not top6	Not top6	Not top6	55%	53%	Not Top6

[A]

SHOPPING - SATISFACTION

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
Quality	5.30	5.30	5.40	5.40	5.30	5.40	5.40	5.52	5.48	5.37	5.53	5.36
Variety	5.20	5.20	5.30	5.30	5.20	5.30	5.30	5.41	5.41	5.28	5.45	5.27

[A]
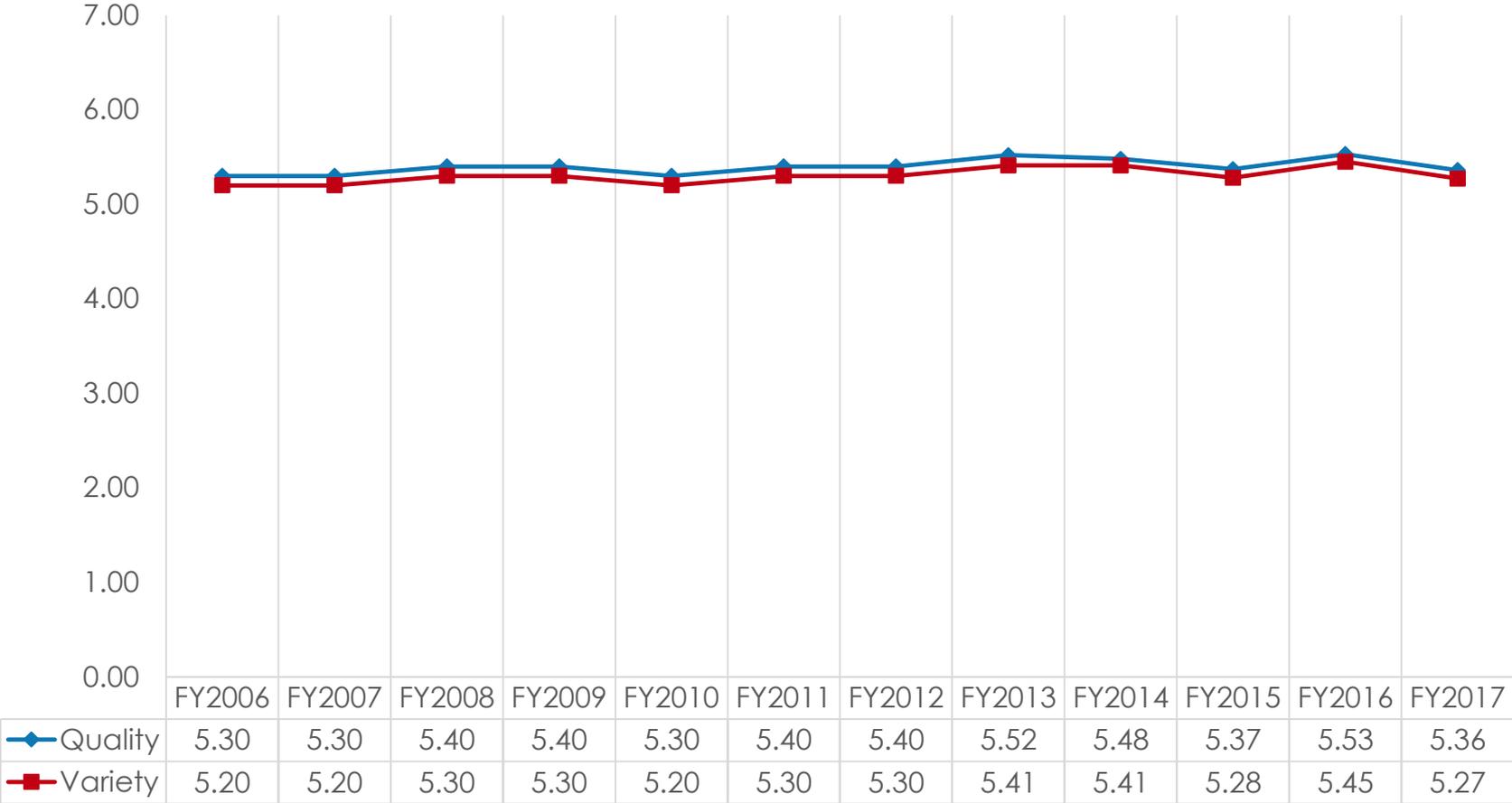
OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

[A]
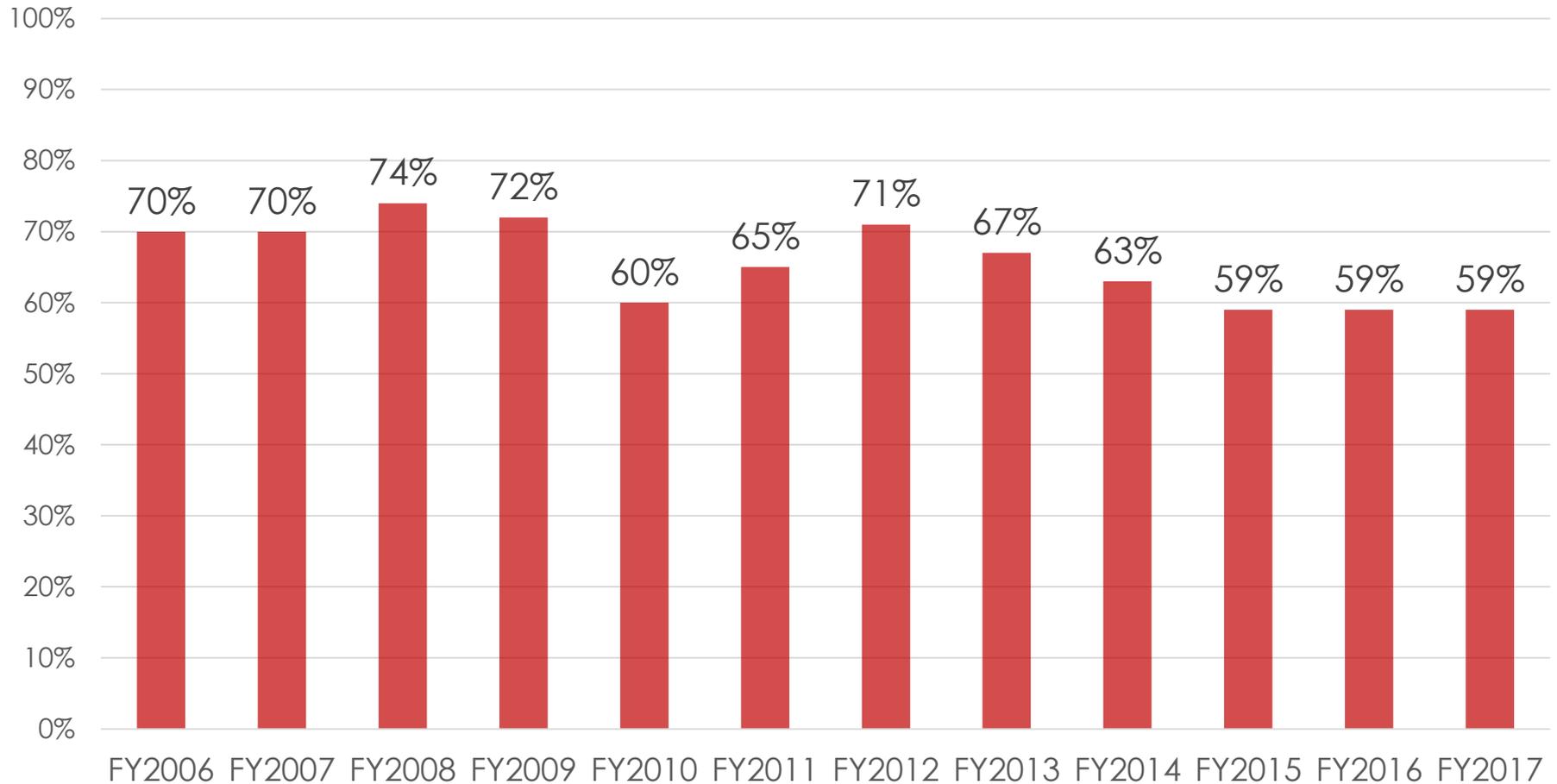
Optional Tour Participation (Top Responses) FY2017

[A]
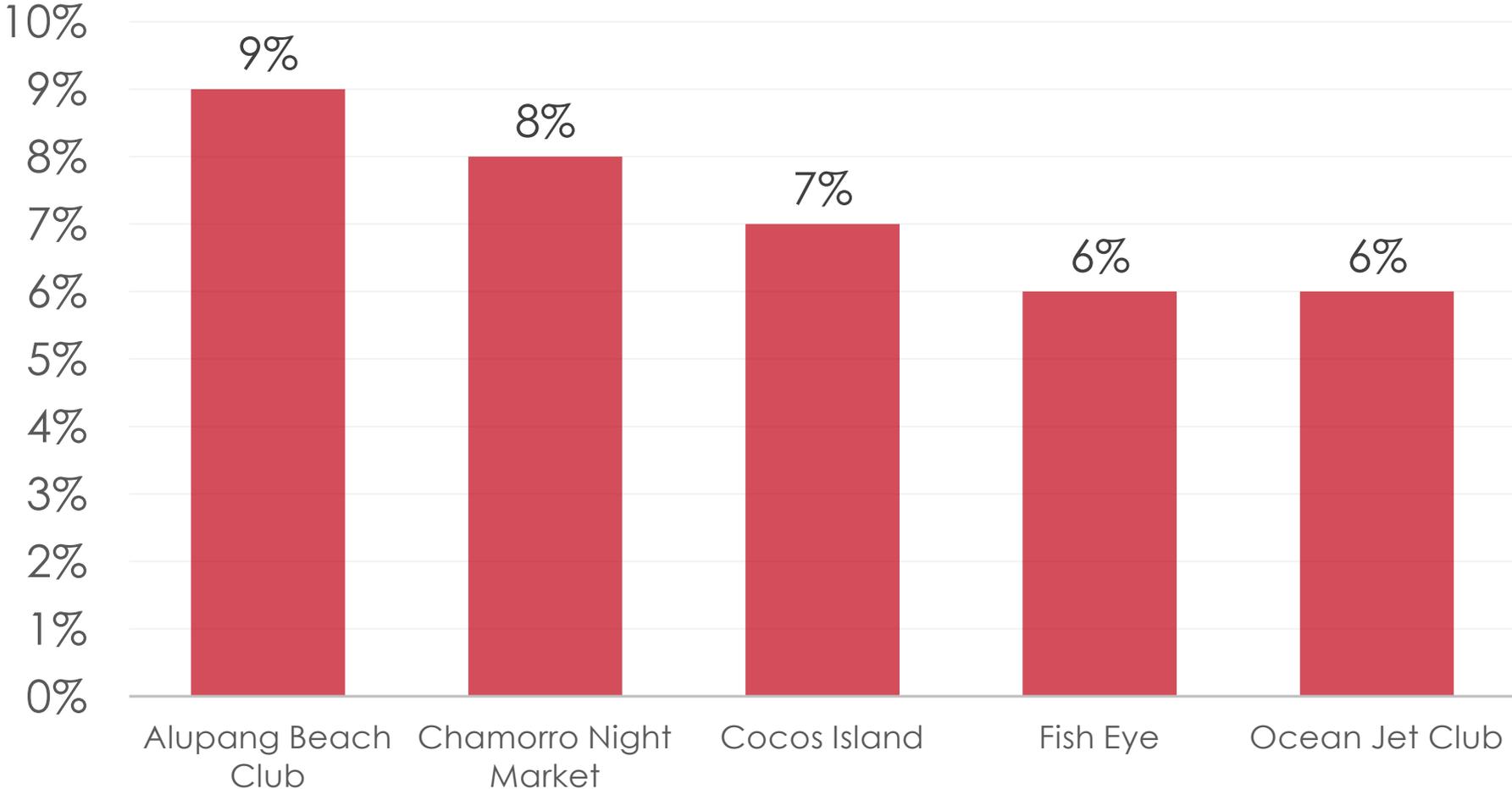
Optional Tour Satisfaction
Top Responses only - Participation (5%+)

Chart data:

	Alupang Beach Club	Ocean Jet Club	Fish Eye	Cocos Island	Chamorro Night Market
Very Satisfied (Top Box)	44%	44%	47%	46%	34%
MEAN (7pt Scale)	6.03	6.02	5.99	5.91	5.63

Legend: Very Satisfied (Top Box) — MEAN (7pt Scale)

[A]

DAY TOUR - SATISFACTION

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
Quality	5.30	5.30	5.30	5.30	5.40	5.40	5.50	5.57	5.47	5.56	5.57	5.46
Variety	5.20	5.20	5.30	4.70	5.30	5.40	5.40	5.52	5.43	5.50	5.52	5.40

NIGHT TOUR - SATISFACTION

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
Quality	4.50	4.60	4.70	4.70	4.70	4.70	4.80	4.84	4.79	4.80	4.88	4.83
Variety	4.50	4.60	4.70	5.40	4.70	4.70	4.70	4.83	4.78	4.79	4.87	4.80

[A]

Activities Participation (Top Responses)

[A]
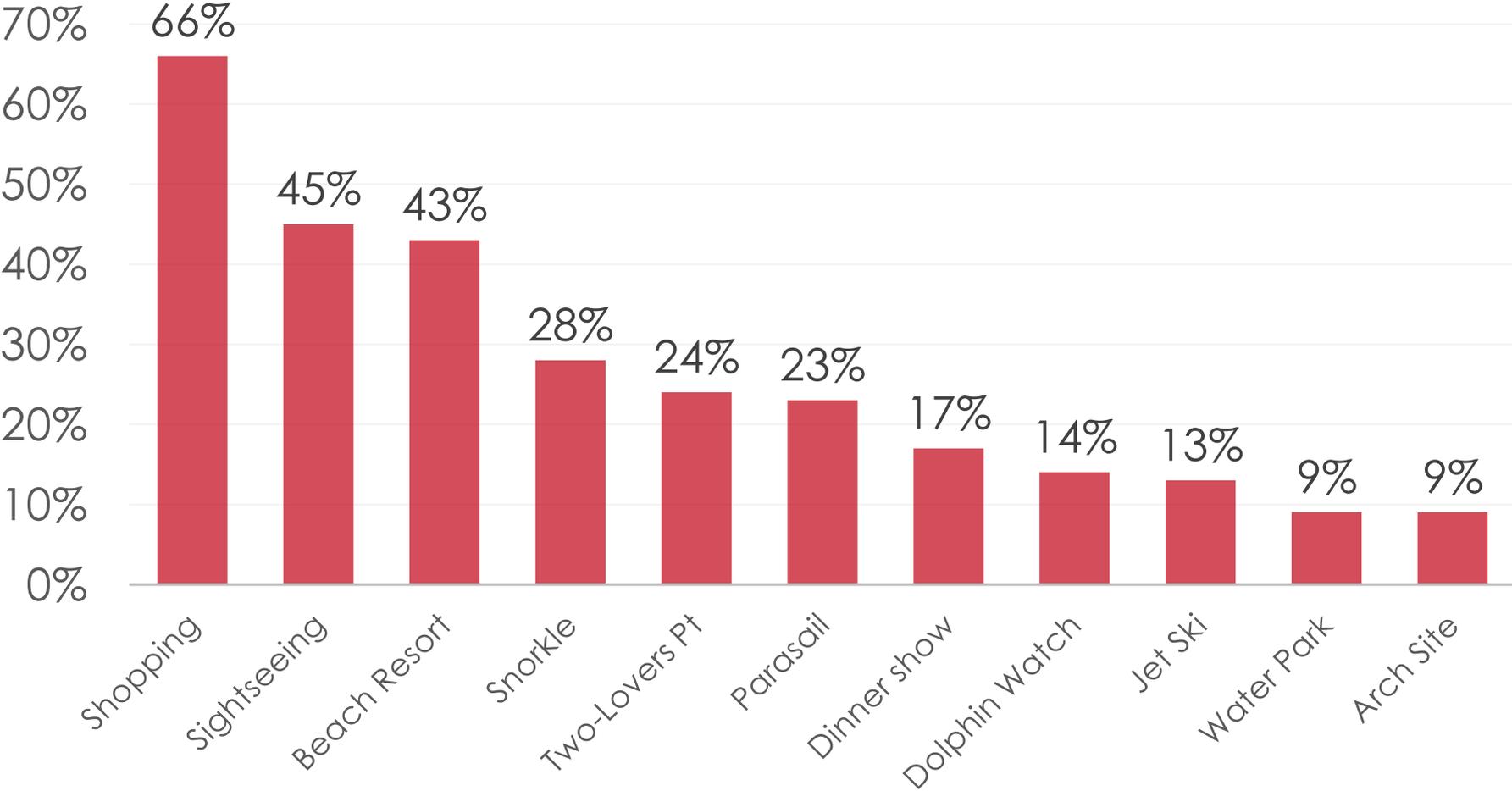
SECTION 5

PROMOTIONS

[A]

INTERNET - GUAM SOURCES OF INFORMATION
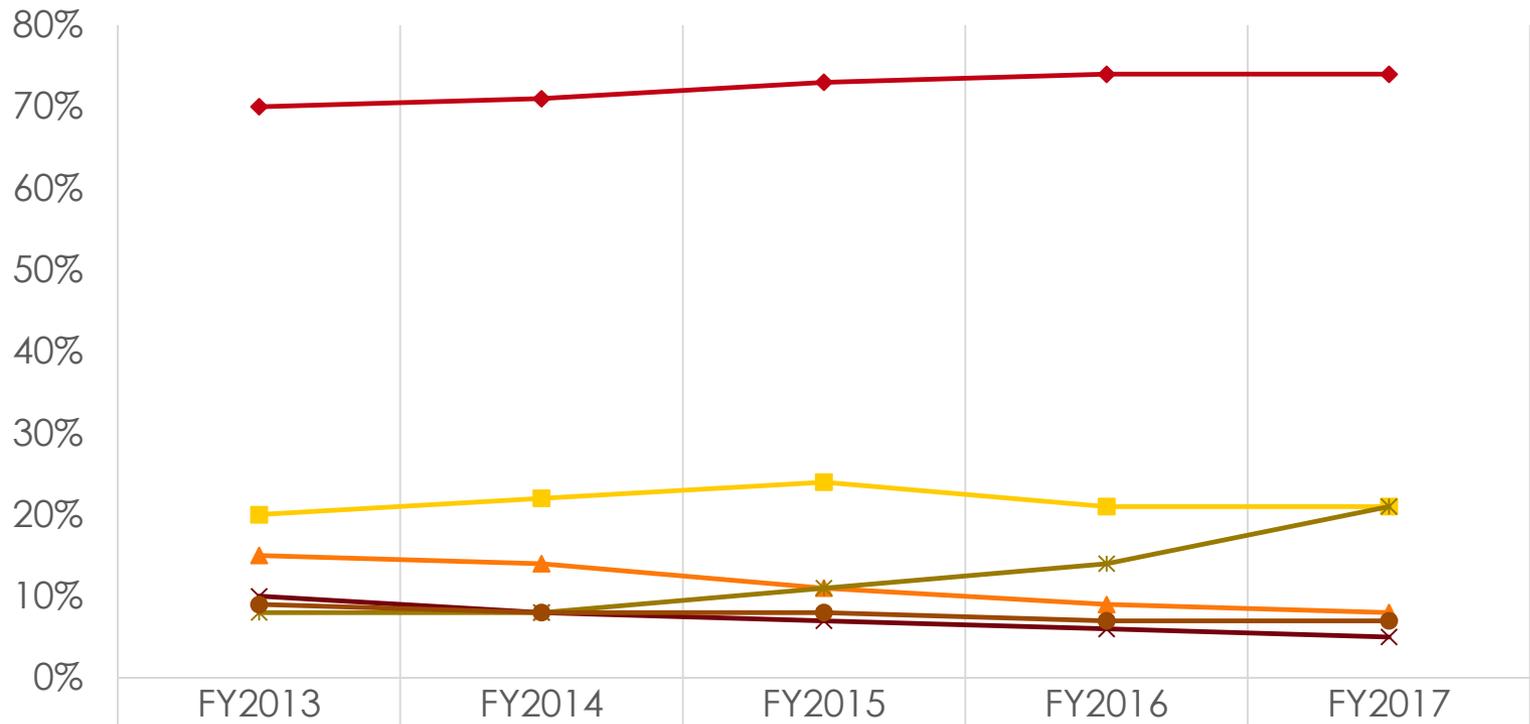
	FY2013	FY2014	FY2015	FY2016	FY2017
Search Engines	70%	71%	73%	74%	74%
Blogs	20%	22%	24%	21%	21%
None	15%	14%	11%	9%	8%
Q&A sites	10%	8%	7%	6%	5%
Social network	8%	8%	11%	14%	21%
Forums	9%	8%	8%	7%	7%

[A]

INTERNET- SOURCES OF INFORMATION
Things to do on Guam
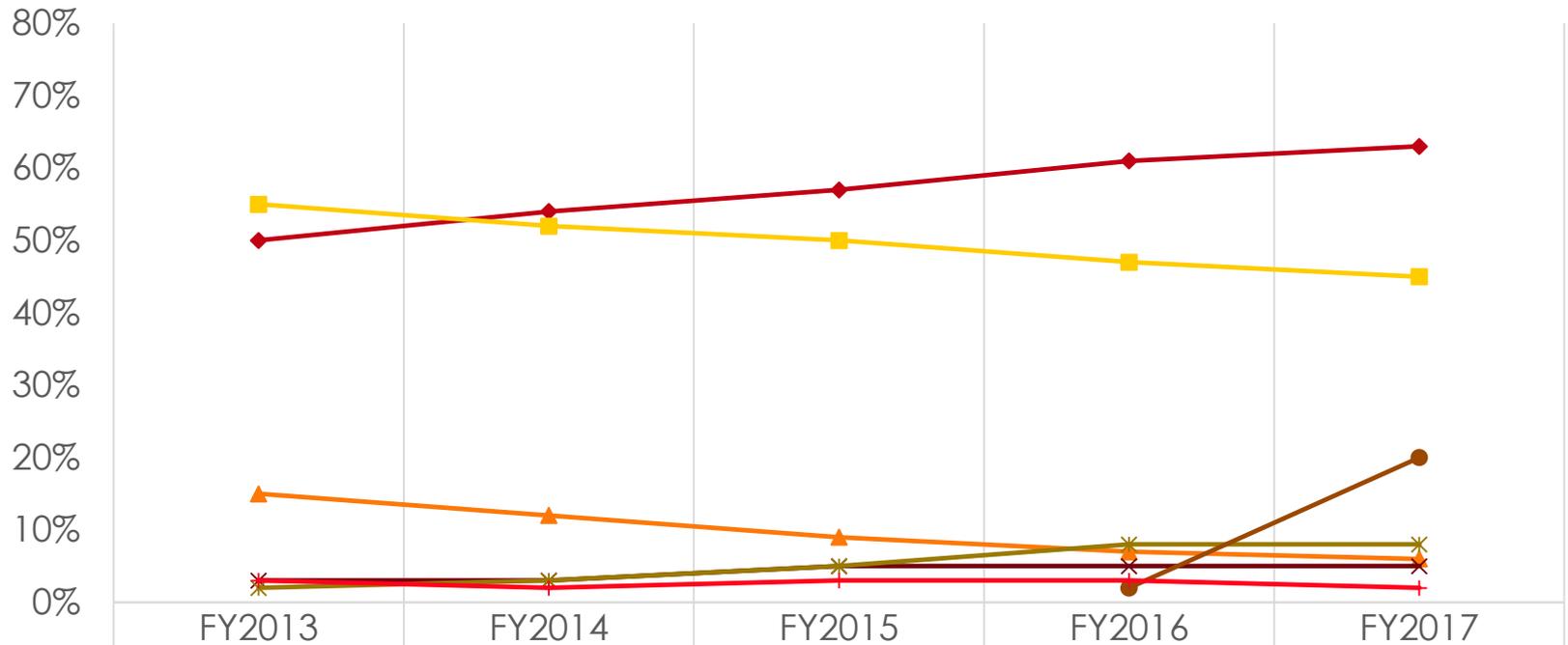
	FY2013	FY2014	FY2015	FY2016	FY2017
Google	50%	54%	57%	61%	63%
Yahoo	55%	52%	50%	47%	45%
None	15%	12%	9%	7%	6%
Facebook	3%	3%	5%	5%	5%
Twitter	2%	3%	5%	8%	8%
Instagram				2%	20%
Other	3%	2%	3%	3%	2%

[A]

INTERNET- SOURCES OF INFORMATION GVB
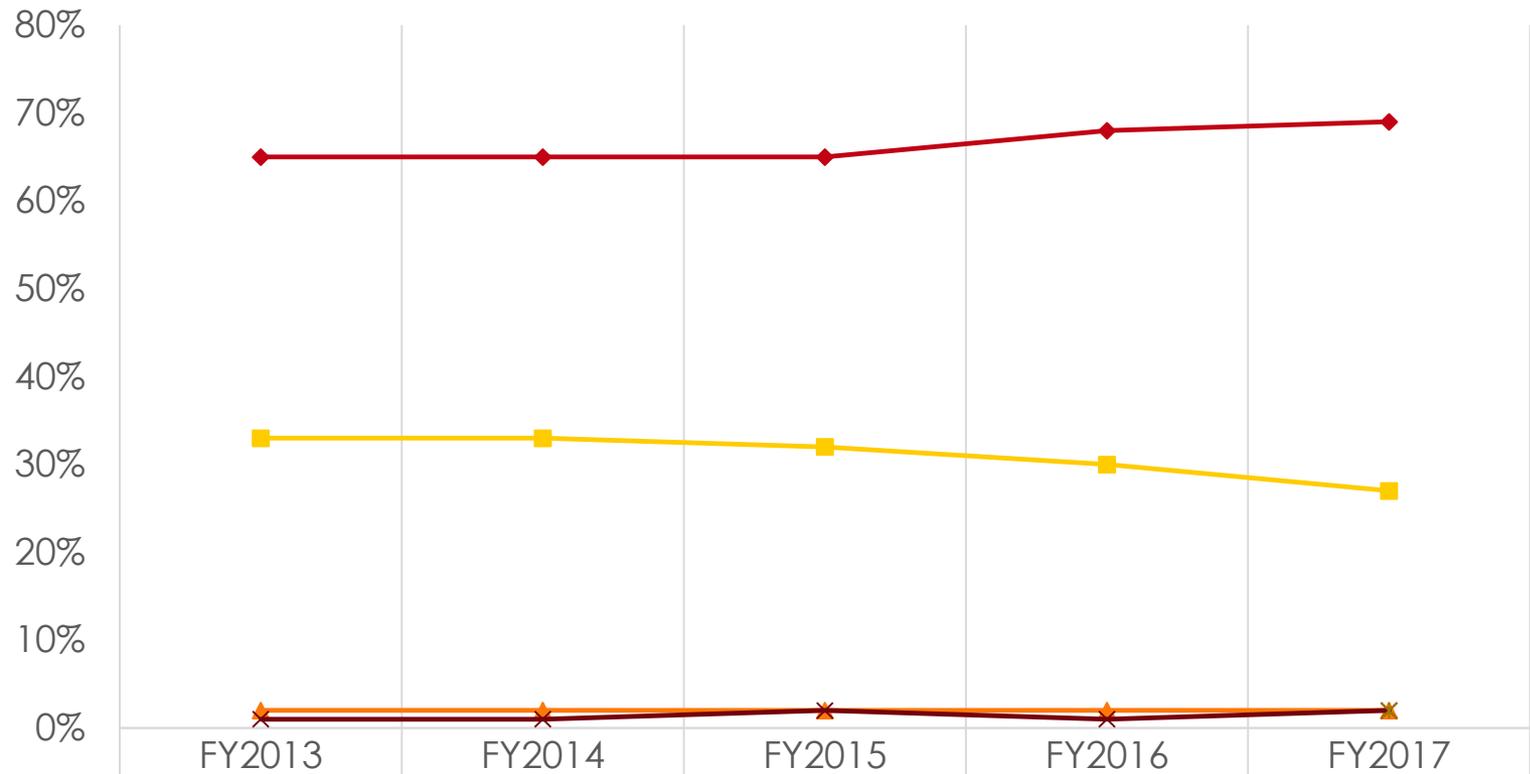
	FY2013	FY2014	FY2015	FY2016	FY2017
None	65%	65%	65%	68%	69%
GVB Website	33%	33%	32%	30%	27%
GVB Facebook	2%	2%	2%	2%	2%
GVB Twitter	1%	1%	2%	1%	2%
GVB Instagram					2%

[A]

TRAVEL MOTIVATION
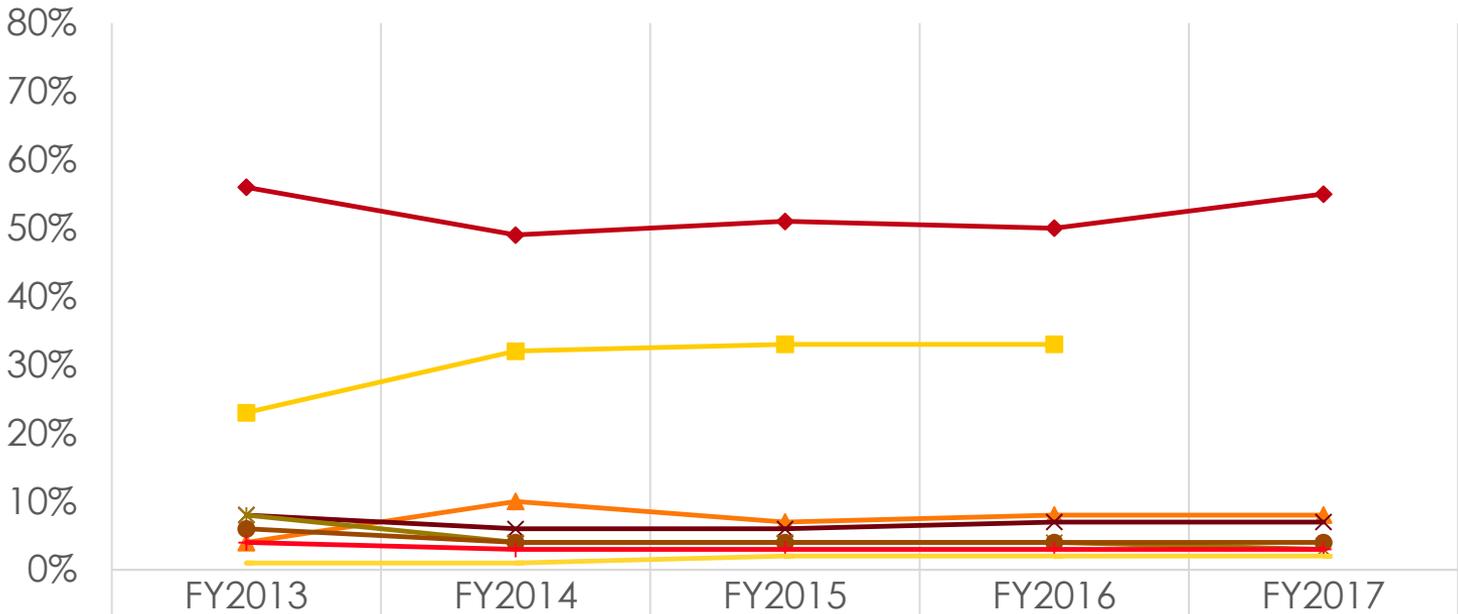
	FY2013	FY2014	FY2015	FY2016	FY2017
Friends/ Family	56%	49%	51%	50%	55%
Other	23%	32%	33%	33%	
Company/ Bus Trip	4%	10%	7%	8%	8%
Internet	8%	6%	6%	7%	7%
Travel show	8%	4%	4%	4%	3%
Travel agent	6%	4%	4%	4%	4%
Magazine	4%	3%	3%	3%	3%
Social Media	1%	1%	2%	2%	2%

[A]

PRE-ARRIVAL
SOURCES OF INFOMATION

[A]
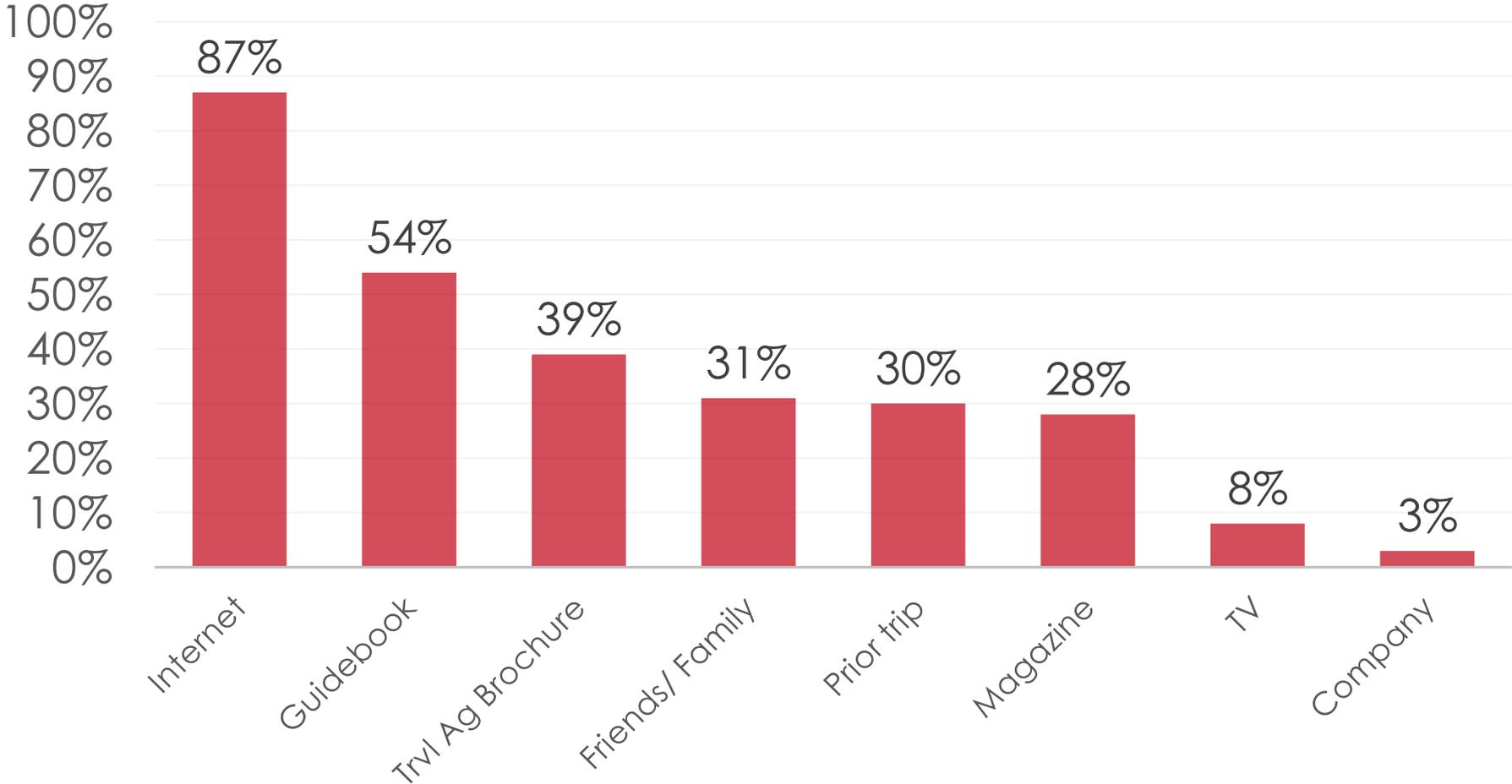
PRE-ARRIVAL SOURCES OF INFORMATION

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
Guide-book	43%	36%	41%	36%	34%	37%	39%	32%	27%	27%	26%	54%
Inter-net	22%	28%	25%	30%	36%	34%	32%	33%	38%	42%	45%	87%
Bro-chure	15%	16%	15%	15%	11%	12%	10%	9%	8%	Not Top 3	Not Top 3	39%
Friend/Re-lative	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	Not Top 3	8%	8%	Not top 3

[A]

ONISLE
SOURCES OF INFOMATION

[A]
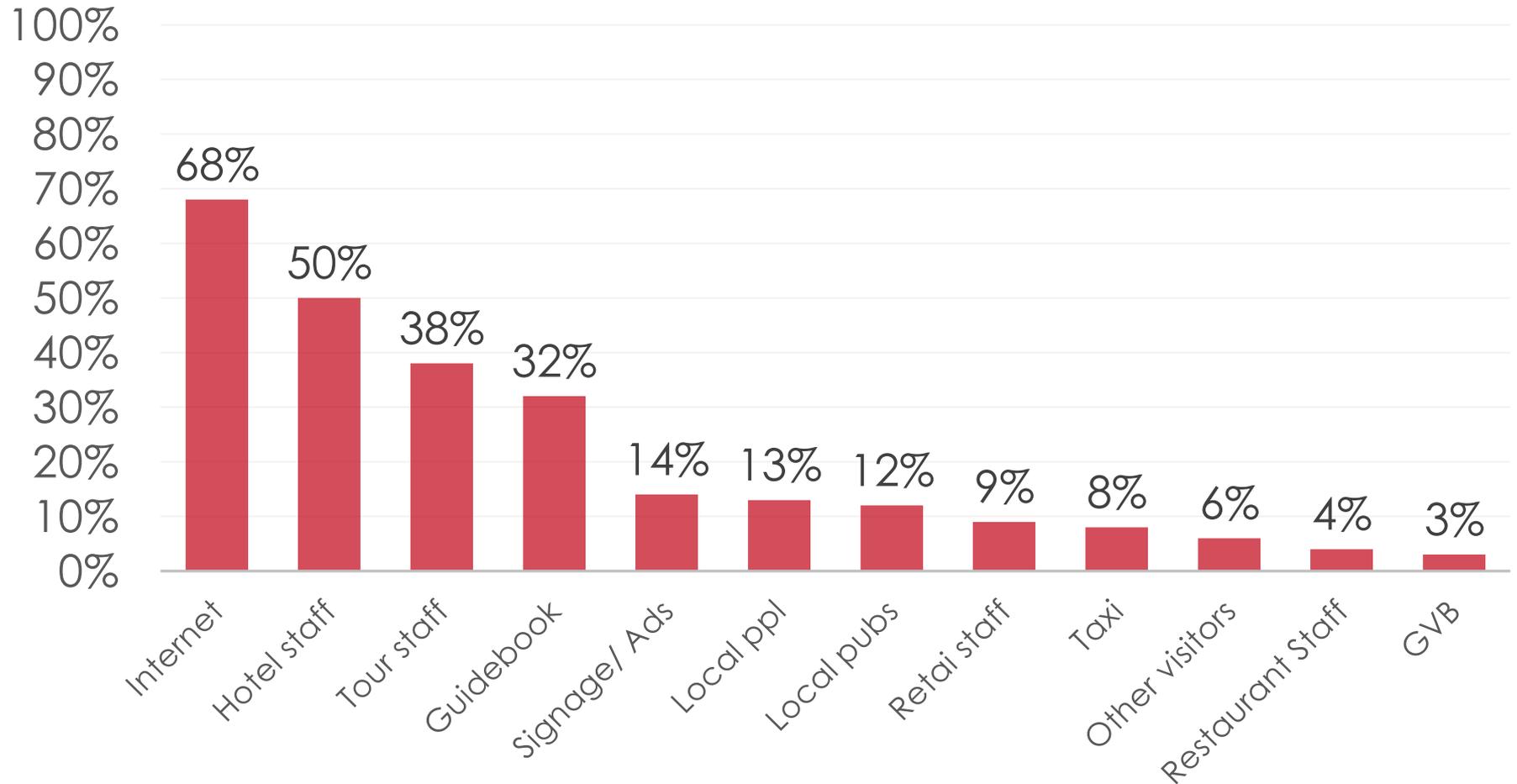
ON-ISLE
SOURCES OF INFORMATION

	FY 2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
Tour staff	46%	42%	44%	47%	44%	46%	40%	33%	31%	27%	22%	38%
Hotel staff	13%	16%	15%	17%	22%	22%	21%	25%	25%	22%	19%	50%
Inter-net								11%	18%	28%	37%	68%
Sign-age	6%	Not top 3	Not top 3	6%	7%	Not top 3	6%	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3
Vis Ch.	Not top 3	9%	10%	6%	Not top3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3
Local ppl	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3	7%	6%	Not top 3	Not top 3	Not top 3	Not top 3	Not top 3

[A]

SOURCES OF INFORMATION
TRIP INFLUENCERS
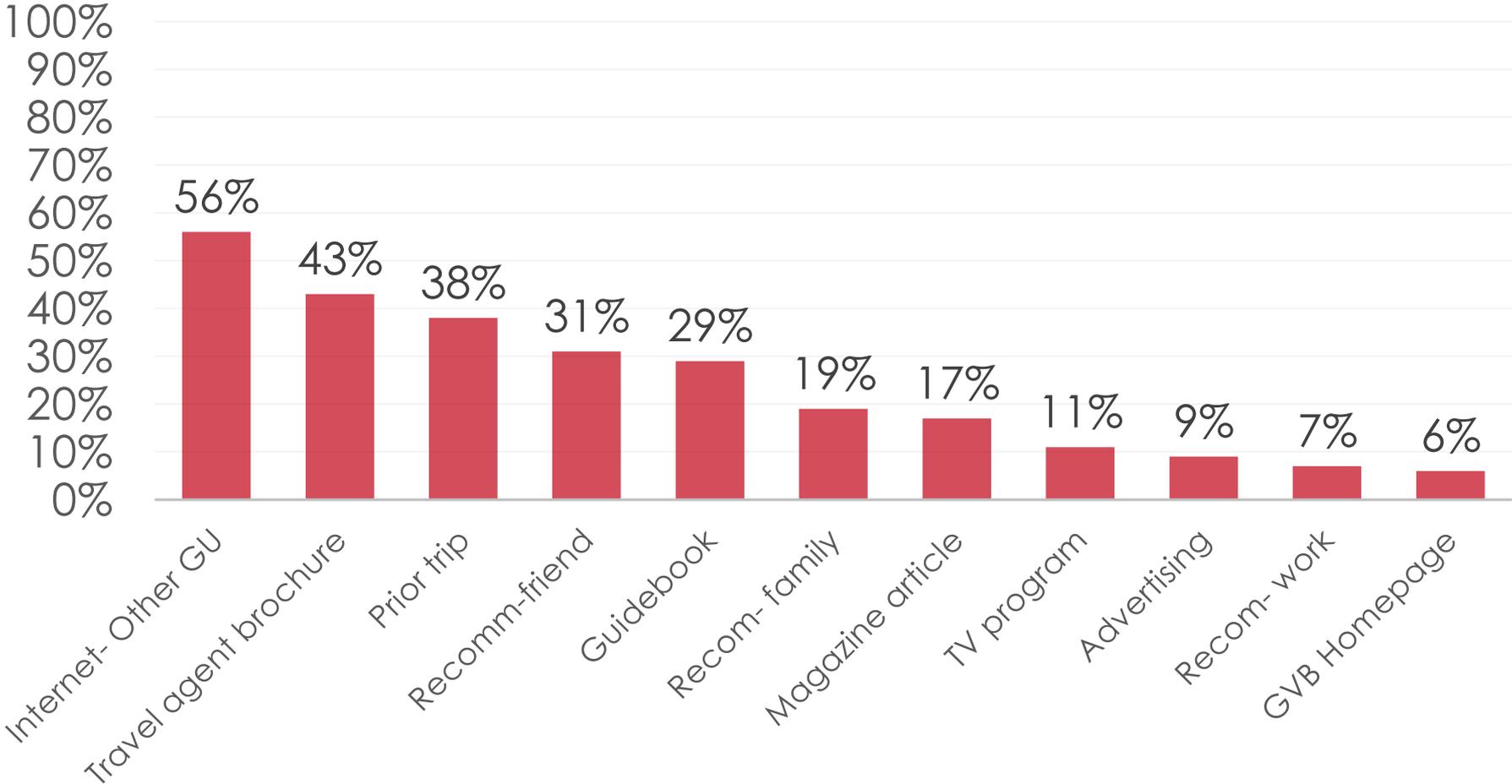
# SOURCES OF INFORMATION
TRIP INFLUENCERS – KEY SEGMENTS

|	FY2013	FY2014	FY2015	FY2016	FY2017
Prior Trip	18%	21%	21%	21%	38%
Travel agent brochure	22%	19%	19%	17%	43%
Internet- Other Guam	15%	16%	19%	21%	56%

[A]

SECTION 6
FUTURE TRAVEL TO GUAM

[A]

Will security screening/ immigration at Guam Airport impact future travel to Guam?

Yes
26%

No
74%

[A]
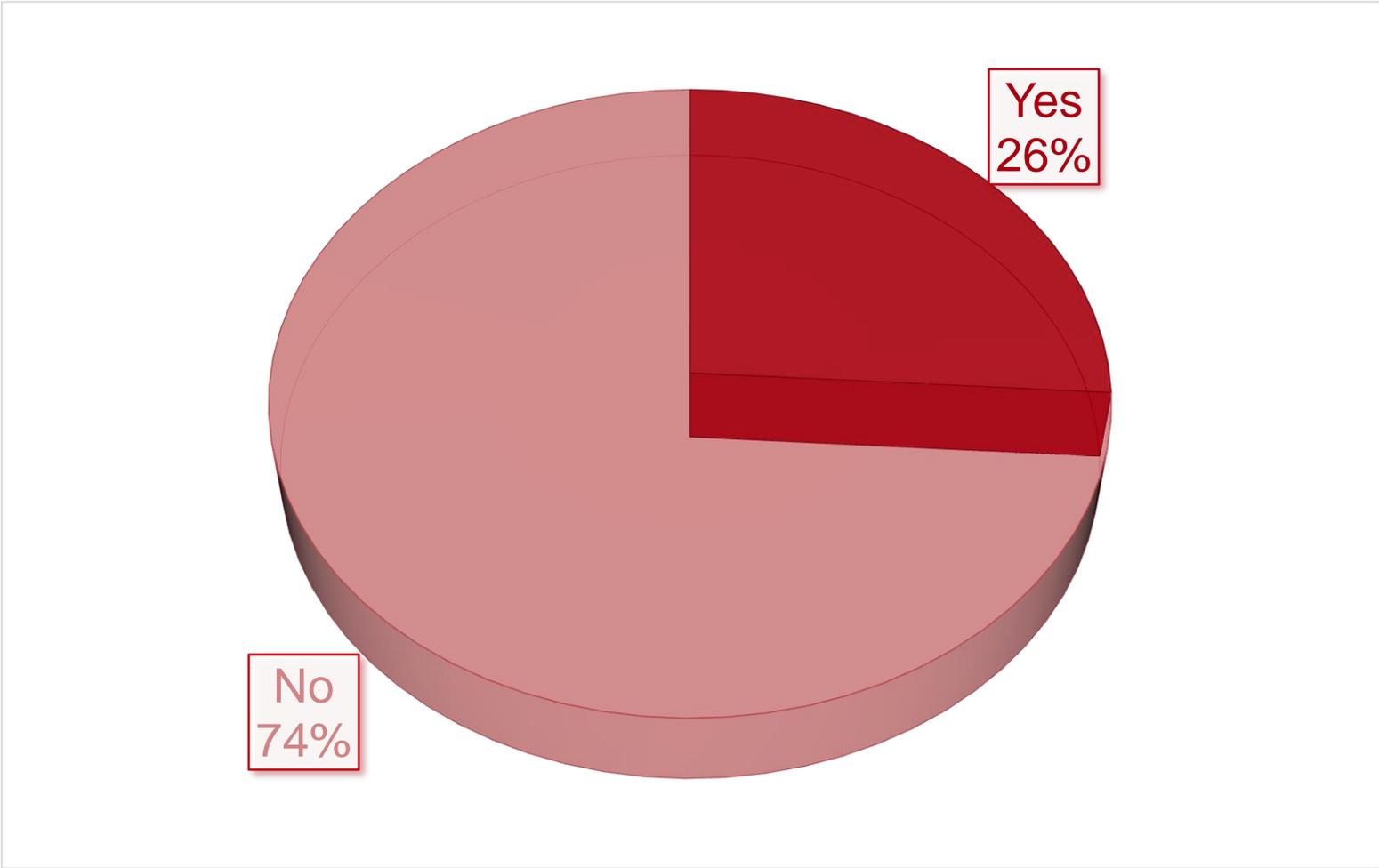
What would it take to make you stay an extra day on Guam?
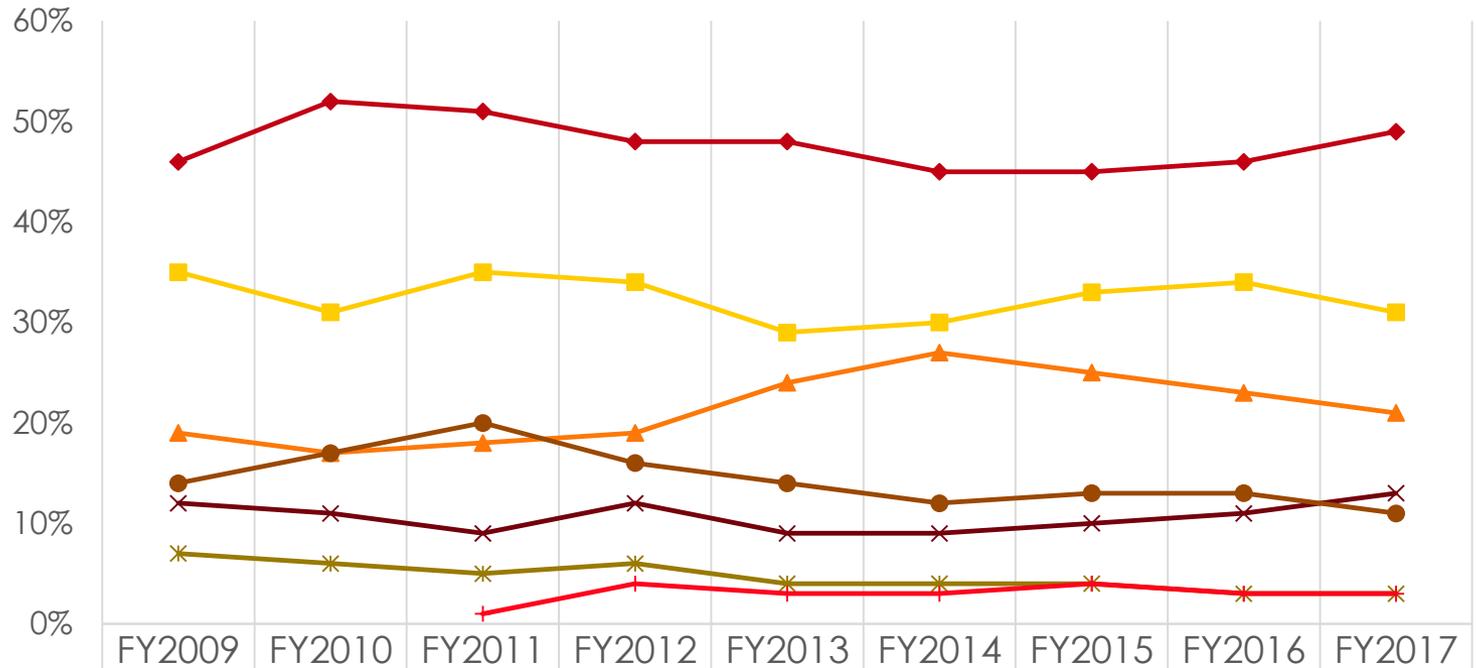
	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017
More time	46%	52%	51%	48%	48%	45%	45%	46%	49%
Budget/ money	35%	31%	35%	34%	29%	30%	33%	34%	31%
Nothing	19%	17%	18%	19%	24%	27%	25%	23%	21%
Things to do	12%	11%	9%	12%	9%	9%	10%	11%	13%
Less restrictions	7%	6%	5%	6%	4%	4%	4%	3%	3%
Flight Schedule	14%	17%	20%	16%	14%	12%	13%	13%	11%
Pkgs- longer stays			1%	4%	3%	3%	4%	3%	3%

[A]

FUTURE TRAVEL CONCERNS
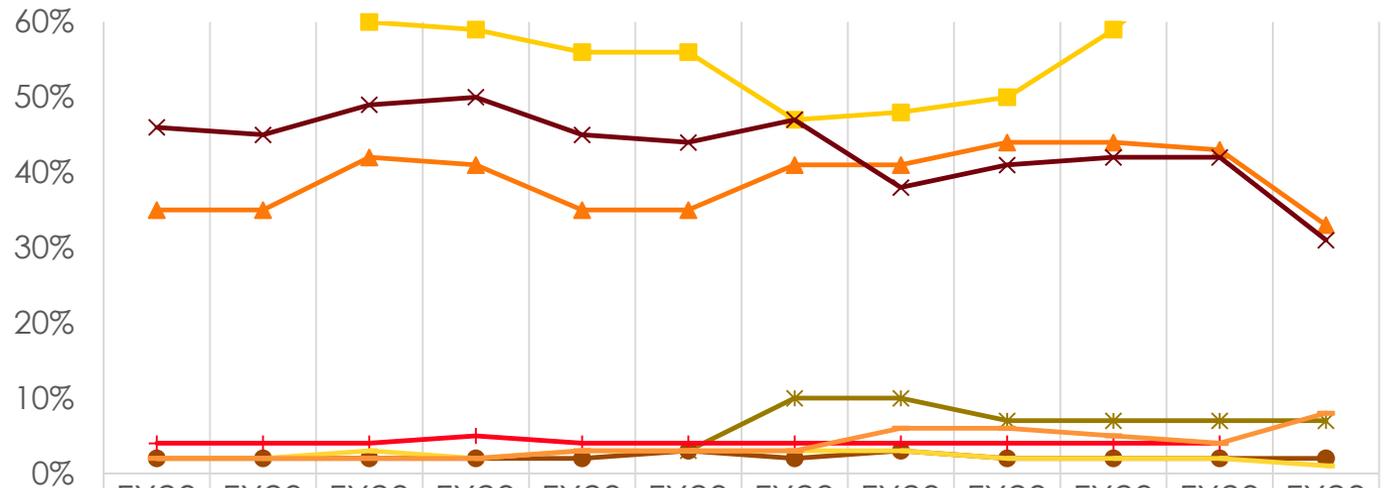
|	FY20 06	FY20 07	FY20 08	FY20 09	FY20 10	FY20 11	FY20 12	FY20 13	FY20 14	FY20 15	FY20 16	FY20 17
Safety	81%	79%	81%	83%	80%	78%	83%	75%	76%	75%	73%	65%
Terrorism	73%	70%	60%	59%	56%	56%	47%	48%	50%	59%	71%	66%
Food	35%	35%	42%	41%	35%	35%	41%	41%	44%	44%	43%	33%
Expense	46%	45%	49%	50%	45%	44%	47%	38%	41%	42%	42%	31%
Discrimination						3%	10%	10%	7%	7%	7%	7%
Should spend at home	2%	2%	2%	2%	2%	3%	2%	3%	2%	2%	2%	2%
Other	4%	4%	4%	5%	4%	4%	4%	4%	4%	4%	4%	
Don't know	2%	2%	3%	2%	3%	3%	3%	3%	2%	2%	2%	1%
No concerns	2%	2%	2%	2%	3%	3%	3%	6%	6%	5%	4%	8%

SECTION 7
GUAM CULTURE

[A]

# EXPERIENCED - CHAMORRO/ HAFA ADAI SPIRIT

[A]
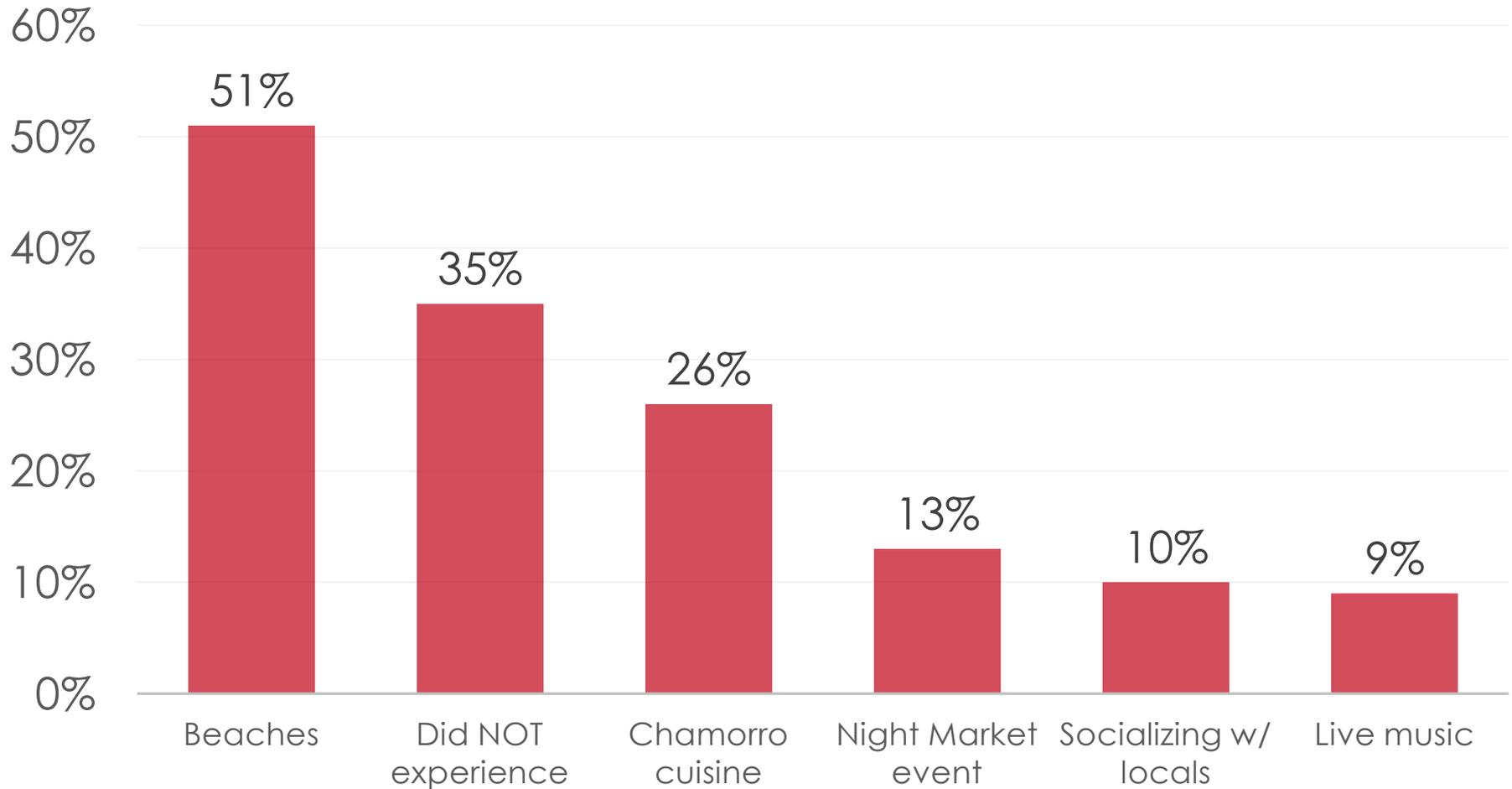
# EXPERIENCED - OTHER CULTURAL ACTIVITY/EVENTS

[A]
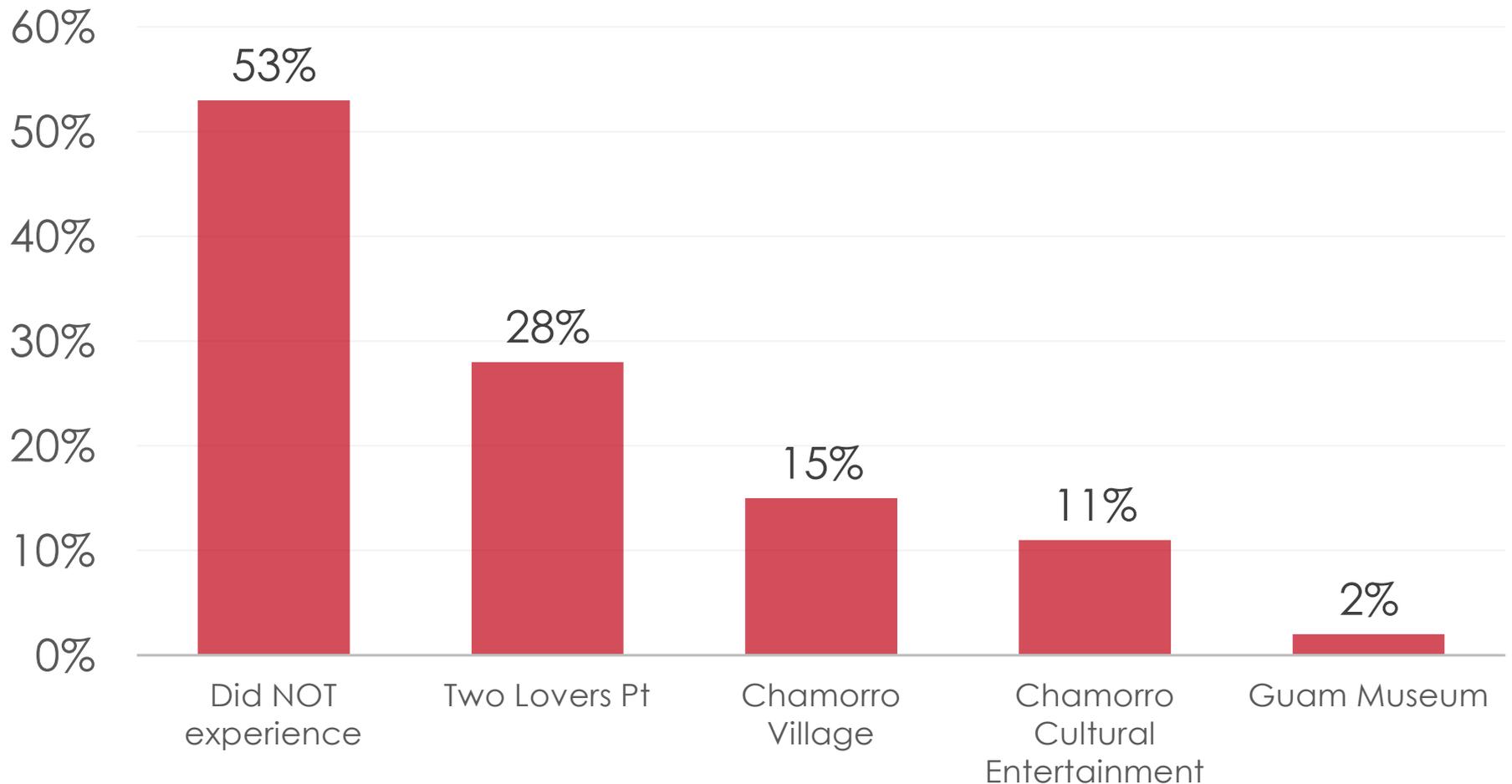
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS
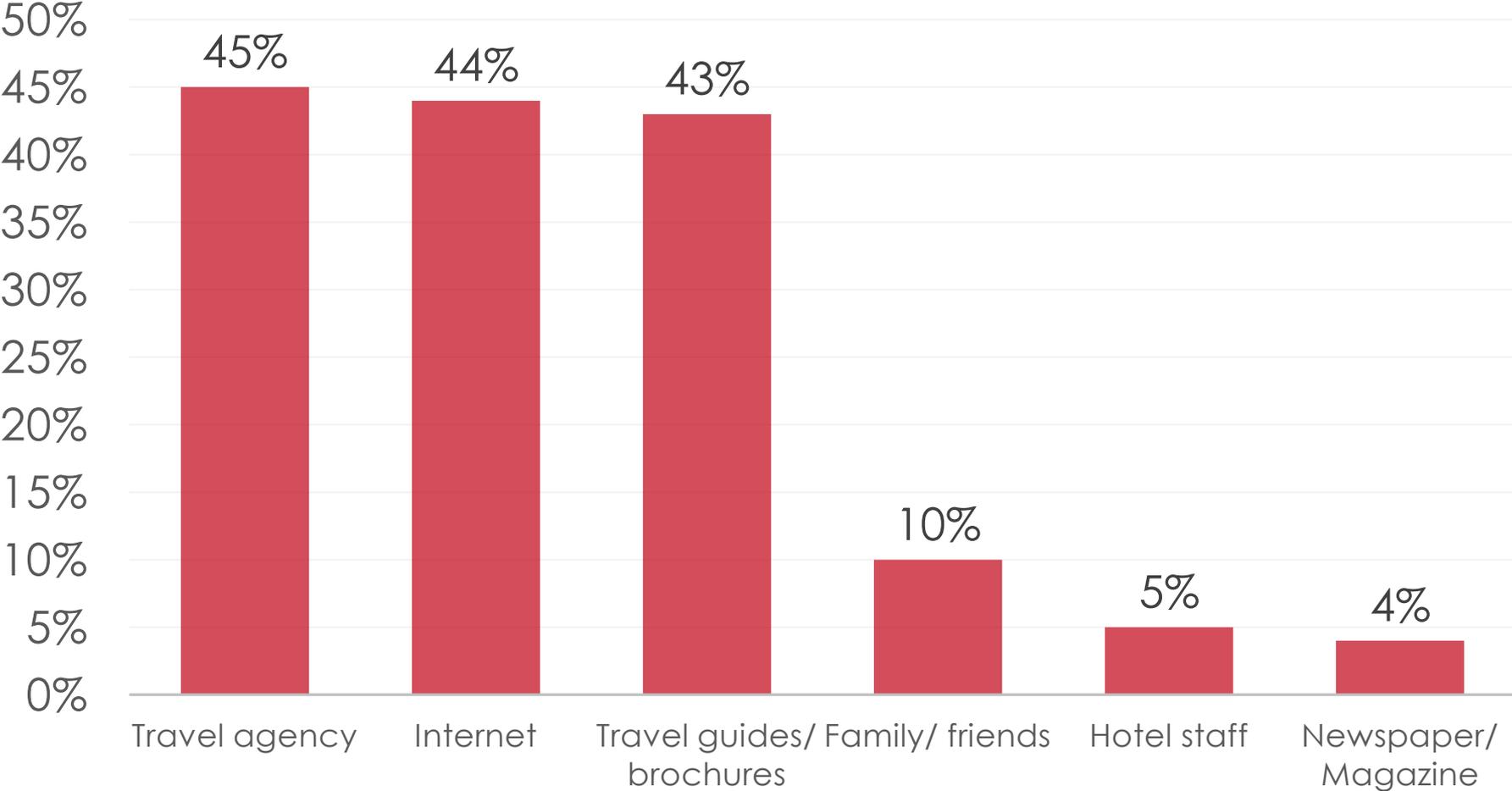
SATISFACTION -
CULTURAL ACTIVITY/EVENTS

[A]
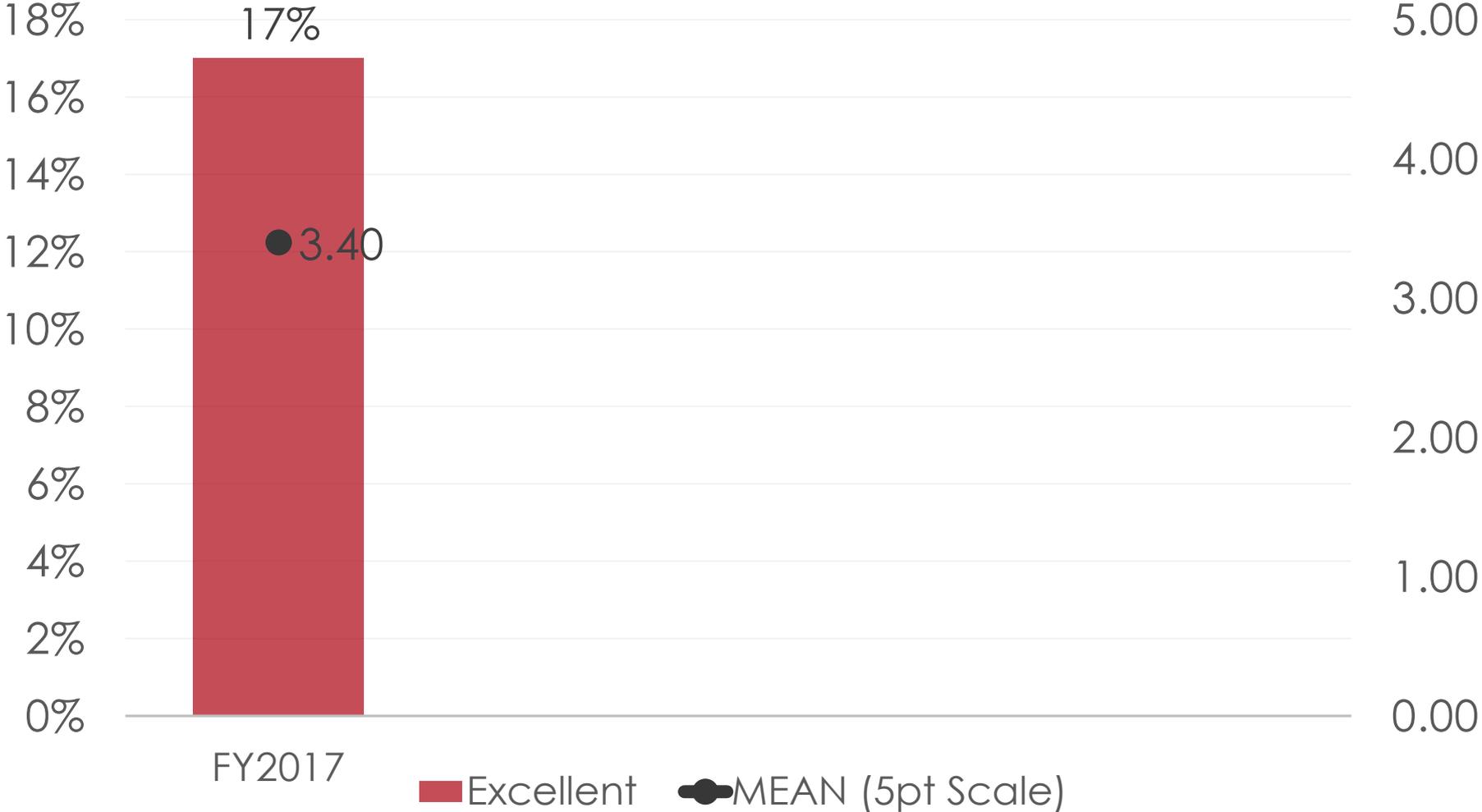
OBSTACLES - CULTURAL ACTIVITY/EVENTS

[A]
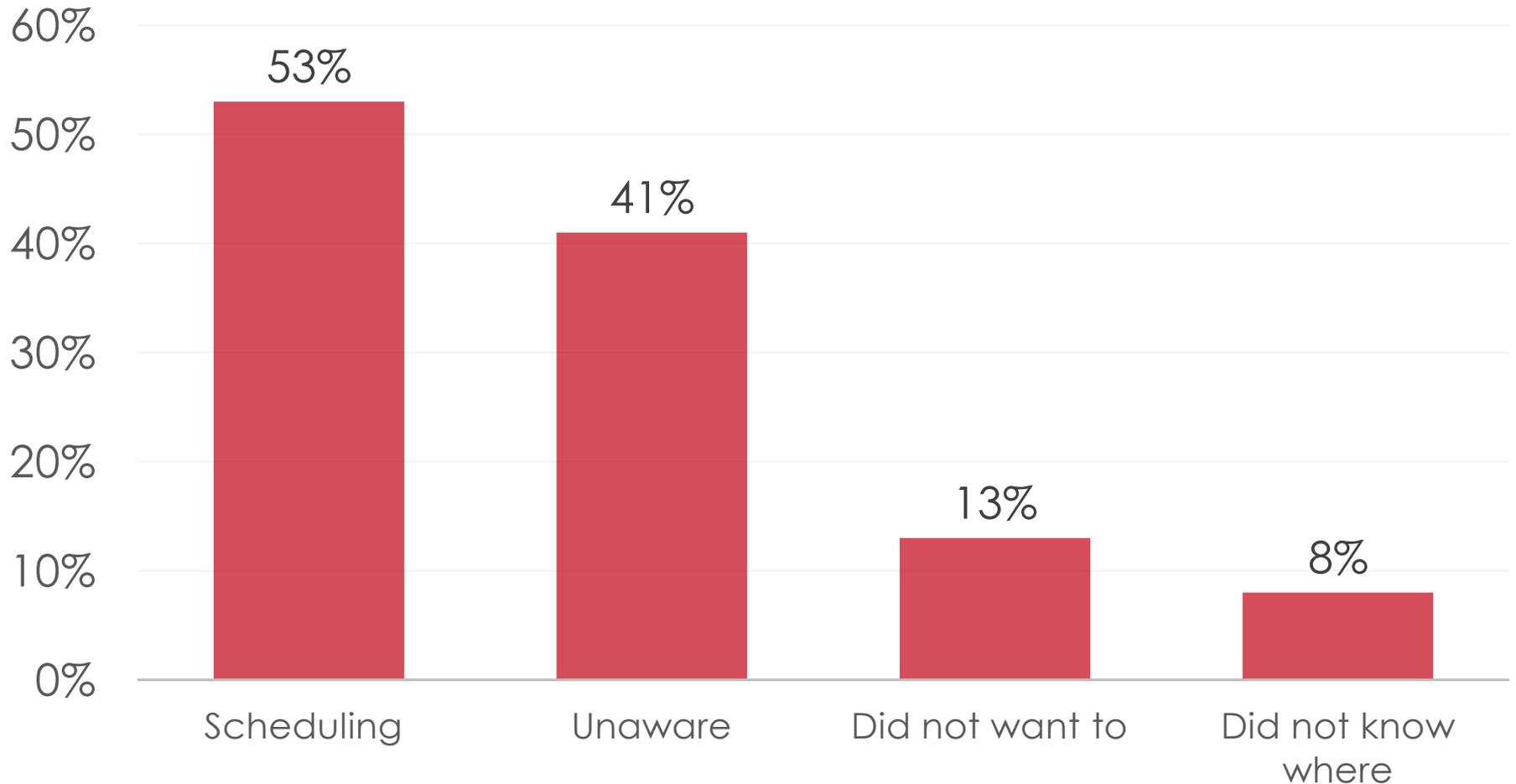
SECTION 8
ADVANCED STATISTICS

Analysis Technique

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)

- Independent variables are satisfaction with different aspects of trip to Guam (numeric).

- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.

- This determines the significant (p=<.05)drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

[A]

Drivers of Overall Satisfaction

Comparison of Drivers of Overall Satisfaction, Annual 2017	
Drivers:	**Annual 2017** **rank**
Quality & Cleanliness of beaches & parks	4
Ease of getting around	6
Safety walking around at night	
Quality of daytime tours	8
Variety of daytime tours	
Quality of nighttime tours	9
Variety of nighttime tours	
Quality of shopping	
Variety of shopping	3
Price of things on Guam	
Quality of hotel accommodations	2
Quality/cleanliness of air, sky	10
Quality/cleanliness of parks	11
Quality of landscape in Tumon	7
Quality of landscape in Guam	1
Quality of ground handler	5
Quality/cleanliness of transportation vehicles	12
% of Overall Satisfaction Accounted For	**51.8%**
NOTE: Only significant drivers are included.	

[A]

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japan visitor's experience on Guam is driven by twelve significant factors in the 2017 Period. By rank order they are:
  - **Quality of landscape in Guam,**
  - **Quality of hotel accommodations,**
  - **Variety of shopping,**
  - **Quality & cleanliness of beaches & parks,**
  - **Quality of ground handler,**
  - **Ease of getting around,**
  - **Quality of landscape in Tumon,**
  - **Quality of day time tours,**
  - **Quality of night time tours,**
  - **Quality/cleanliness of air, sky,**
  - **Quality/cleanliness of parks, and**
  - **Quality/cleanliness of transportation vehicles.**
- With all twelve factors the overall r^2 is .518 meaning that **51.8% of overall satisfaction is accounted for by these factors.**

[A]

Drivers of On-isle Expenditures

Comparison of Drivers of Per Person On-Island Expenditures, Annual 2017	
	Annual 2017
Drivers:	rank
Quality & Cleanliness of beaches & parks	
Ease of getting around	2
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	1
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	
Quality/cleanliness of air, sky	
Quality/cleanliness of parks	
Quality of landscape in Tumon	3
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	1.2%
NOTE: Only significant drivers are included.	

[A]

Drivers of On-isle Expenditures

- **Per Person On Isle Expenditures** of Japan visitor's on Guam is driven by three significant factors in the 2017 Period. By rank order they are:
  - **Quality of shopping,**
  - **Ease of getting around, and**
  - **Quality of landscape in Tumon.**
- With these factors, the overall r^2 is .012 meaning that **1.2% of per person on island expenditure is accounted for by these factors.**

[A]