Japan Visitor Tracker Exit Profile & Market Segmentation Report

FY2019 DATA AGGREGATION

[ANTHOLOGY®] RESEARCH

GUAM VISITORS BUREAU | GUAM

Background and Methodology

- All surveys were partially interviewer 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 4,426 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 4,426 is +/- 1.47 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 +/- 1.47 percentage points.

Objectives

- To monitor the effectiveness of the Japanese 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 Japanese marketing plan.

- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

Key Highlighted Segments

- The specific objectives were:
  - To determine the relative size and expenditure behavior of the following market segments:
    - Families (Q11 Traveling w/ spouse/ child/ other family)
    - Office Lady/ Salary Woman (Gender/ D1 Office worker- non-managerial)
    - Group Tour (Q12)
    - MICE (Q8 Convention/ Conference/ Trade Show/ Incentive Trip)
    - Silver (QF Age 60+)
    - Wedding (Q8- Get married/ attend wedding)
    - Repeat Visitor (Q9)
  - To identify the most significant factors affecting overall visitor satisfaction.
  - To identify (for all visitors from Japan) the most important determinants of on-island spending.

Key Highlighted Segments
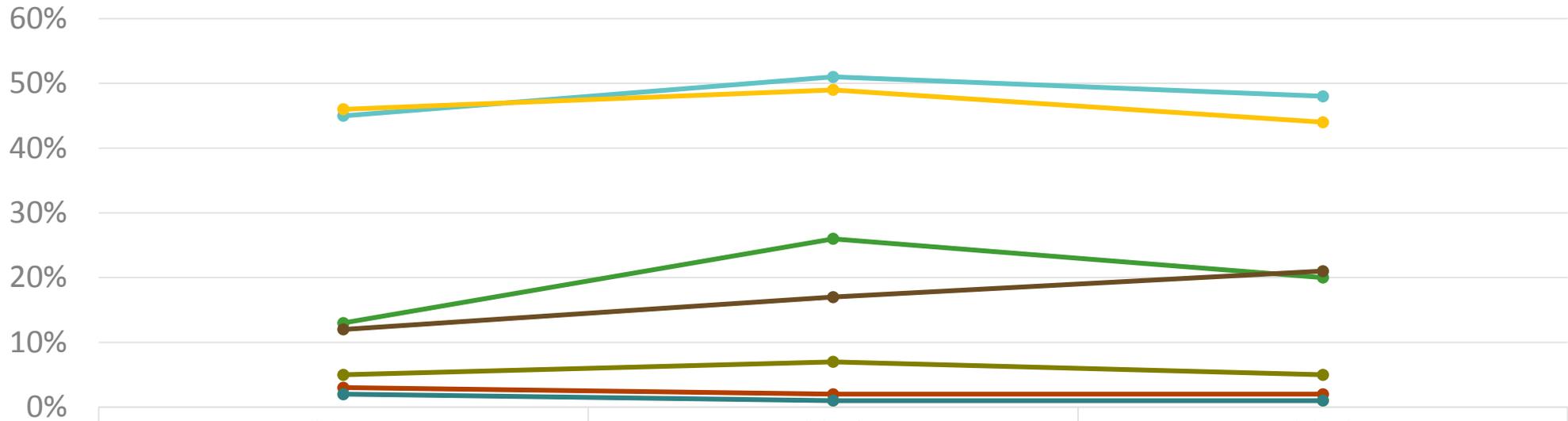
	2017	2018	2019
Family	45%	51%	48%
Repeat	46%	49%	44%
Group Tour	13%	26%	20%
Office Lady	12%	17%	21%
Wedding	5%	7%	5%
Silver	3%	2%	2%
MICE	2%	1%	1%

5

SECTION 1
PROFILE OF RESPONDENTS

GENDER

Male
37%

Female
63%

MARITAL STATUS

Married
44%

Single
56%

Q: Are you married or single?
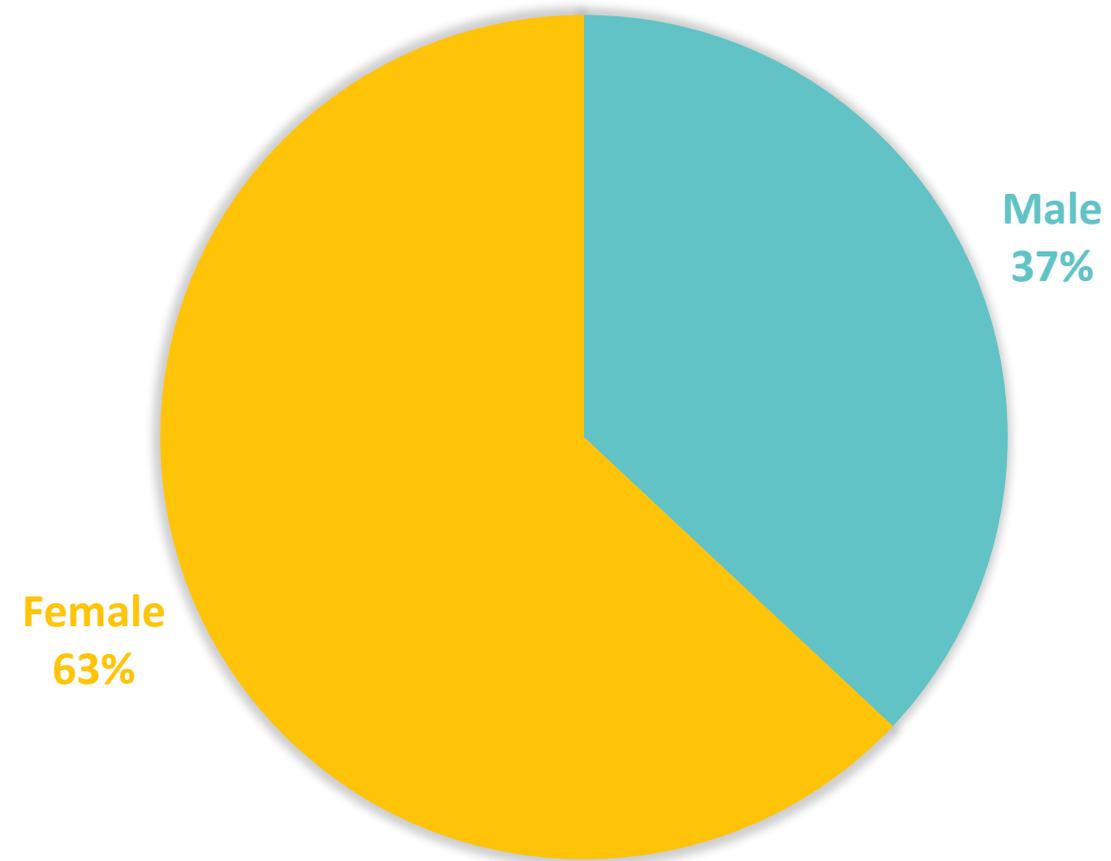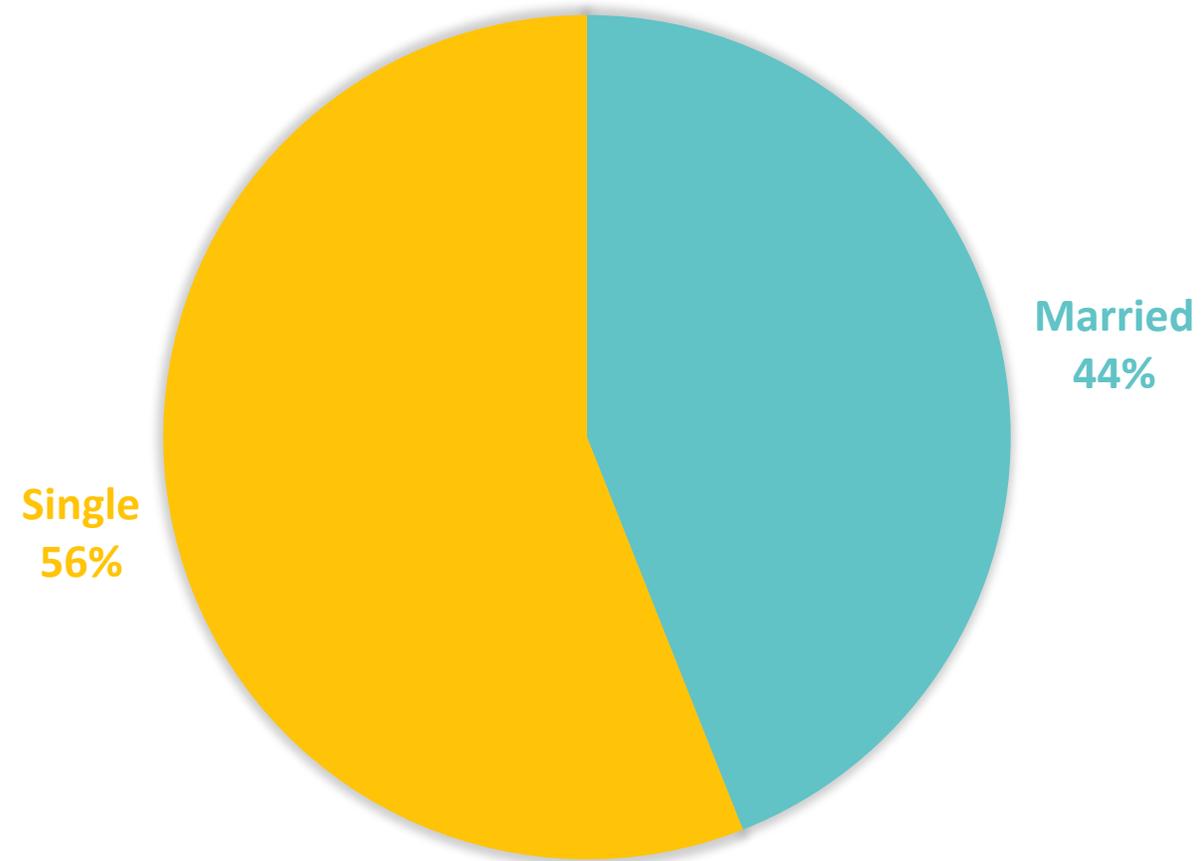
MARITAL STATUS – TRACKING
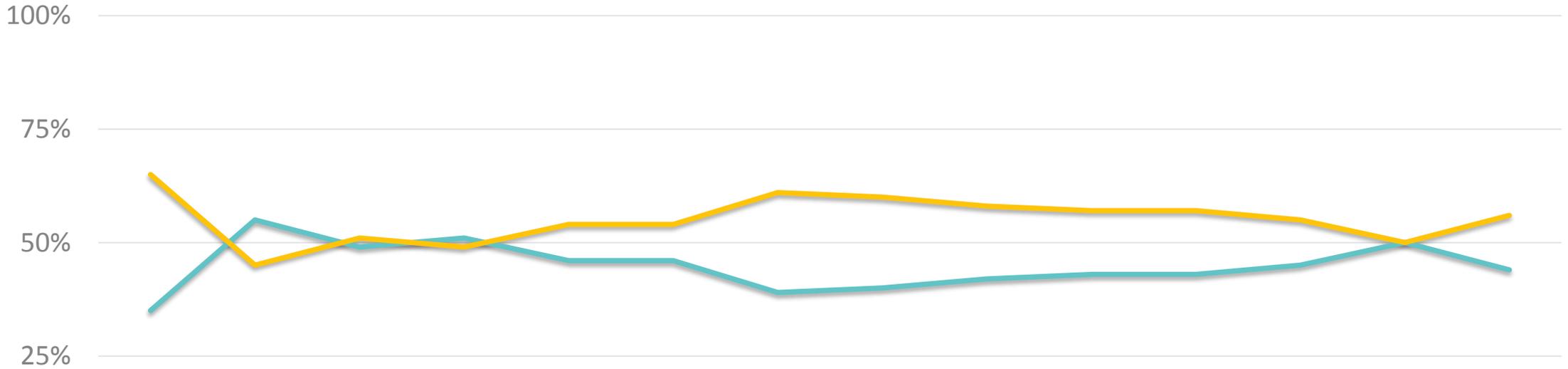
	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
Married	35%	55%	49%	51%	46%	46%	39%	40%	42%	43%	43%	45%	50%	44%
Single	65%	45%	51%	49%	54%	54%	61%	60%	58%	57%	57%	55%	50%	56%

9   *Q: Are you married or single?*

MARITAL STATUS – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
QE Are you married or single?

		TOTAL	FAMILY	OFFICE LADY	GROUP TOUR	MICE	SILVER	WEDDING	REPEAT
		-	-	-	-	-	-	-	-
QE	Married	44%	84%	46%	45%	50%	95%	70%	55%
	Single	56%	16%	54%	55%	50%	5%	30%	45%
	Total	4426	2019	900	847	36	81	204	1872
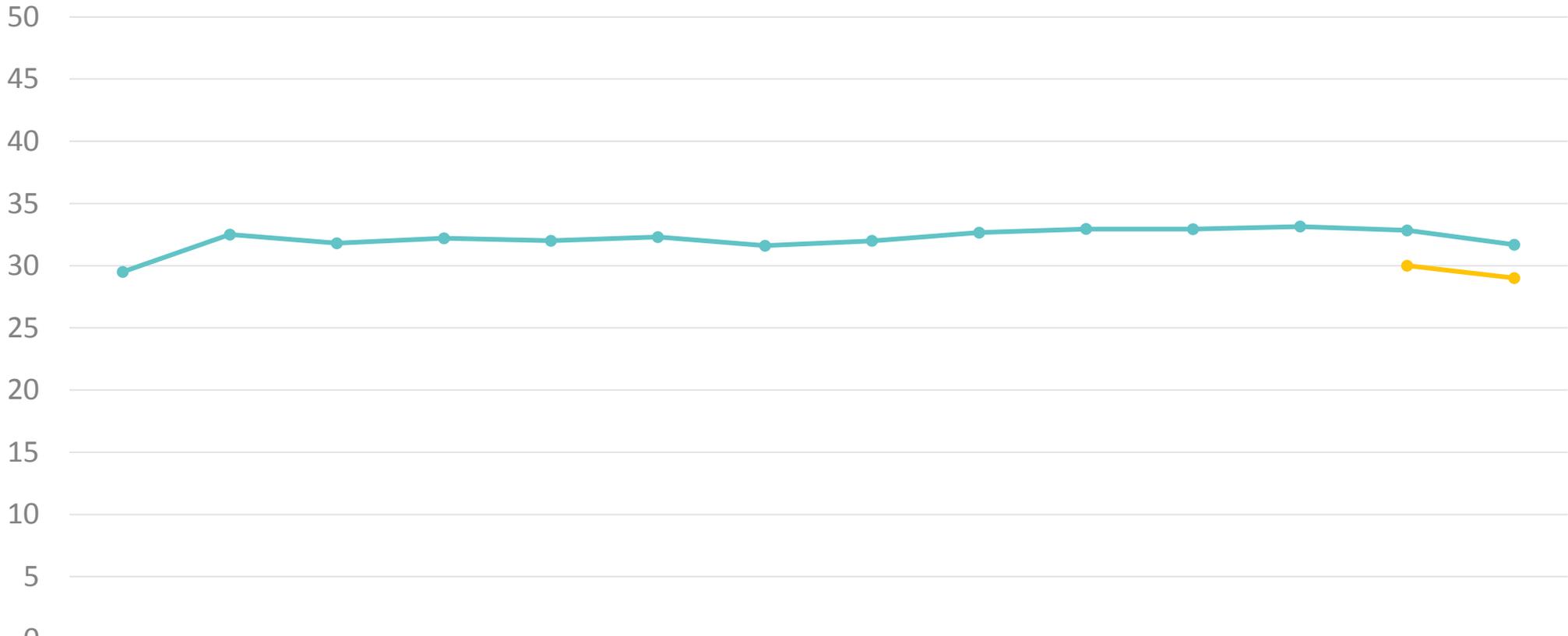
Prepared by Anthology Research

Q: Are you married or single?

AGE – TRACKING

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
Mean	29.5	32.5	31.8	32.2	32	32.3	31.6	31.99	32.66	32.95	32.94	33.14	32.84	31.68
Median													30	29

Q: And what was your age on your last birthday?

AGE – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
QF What was your age on your last birthday?

		TOTAL	FAMILY	OFFICE LADY	GROUP TOUR	MICE	SILVER	WEDDING	REPEAT
		-	-	-	-	-	-	-	-
QF	18-24	32%	10%	20%	29%	8%		13%	19%
	25-39	46%	52%	54%	44%	56%		67%	45%
	40-49	15%	26%	18%	18%	17%		6%	24%
	50-59	6%	9%	7%	7%	8%		9%	9%
	60+	2%	3%	1%	2%	11%	100%	5%	3%
	Total	4426	2019	900	847	36	81	204	1872
QF	Mean	31.68	36.89	33.21	32.83	38.28	64.64	34.05	35.43
	Median	29	36	30	30	35	64	30	34

Prepared by Anthology Research

Q: And what was your age on your last birthday?

HOUSEHOLD INCOME

Bar chart showing household income distribution:
- <Y2M: 9%
- Y2M-3M: 14%
- Y3M-4M: 13%
- Y4M-5M: 11%
- Y5M-7M: 20%
- Y7M-10M: 15%
- Y10M+: 15%
- No Income/Rf: 4%

14   *Q : What was your approximate annual household income, before taxes?*
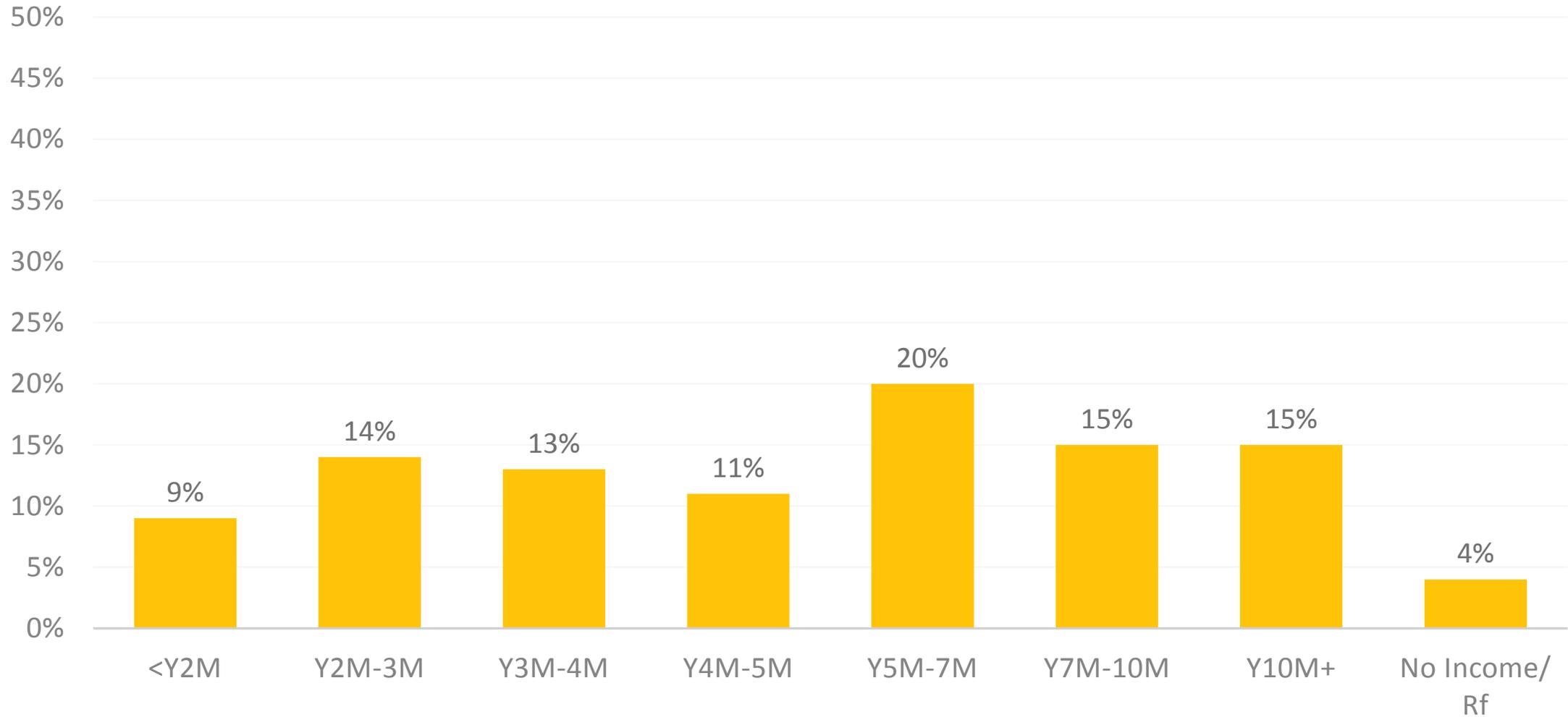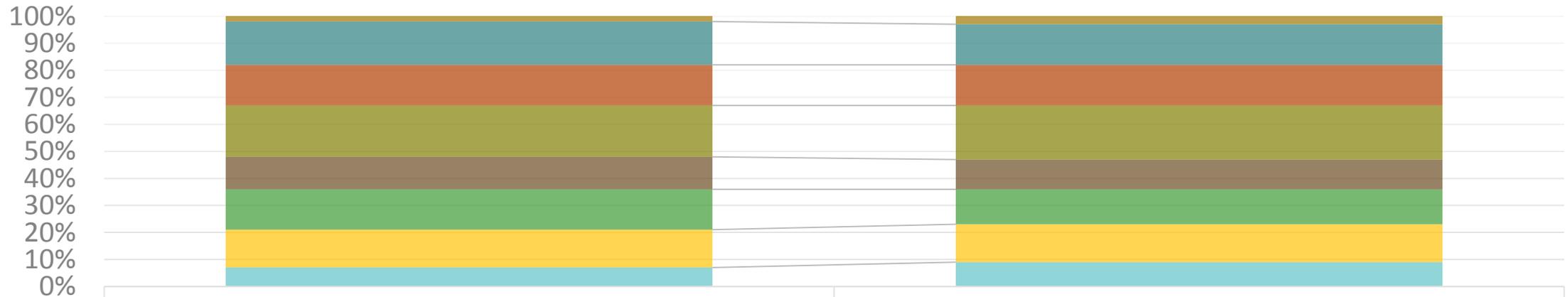
HOUSEHOLD INCOME

	FY2018	FY2019
No Income	3%	4%
Y10M+	16%	15%
Y7M-10M	15%	15%
Y5M-7M	19%	20%
Y4M-5M	12%	11%
Y3M-4M	15%	13%
Y2M-3M	14%	14%
<Y2M	7%	9%

*Q : What was your approximate annual household income, before taxes?*

HOUSEHOLD INCOME – SEGMENTATION

GVB VISITOR SATISFACTION STUDY
D2 What is your approximate annual household income, before taxes?

		TOTAL	FAMILY	OFFICE LADY	GROUP TOUR	MICE	SILVER	WEDDING	REPEAT
		-	-	-	-	-	-	-	-
D2	Less than ¥2 million	9%	5%	8%	10%	3%	8%	7%	6%
	¥2,000,001 ~ ¥3,000,000	14%	8%	19%	15%	14%	14%	9%	11%
	¥3,000,001 ~ ¥4,000,000	13%	10%	16%	14%	25%	14%	14%	11%
	¥4,000,001 ~ ¥5,000,000	11%	11%	12%	13%	14%	15%	15%	11%
	¥5,000,001 ~ ¥7,000,000	20%	24%	19%	17%	22%	14%	24%	21%
	¥7,000,001 ~ ¥10 million	15%	20%	15%	12%	8%	14%	22%	17%
	¥10 million or more	15%	20%	10%	13%	11%	16%	7%	20%
	No income	4%	2%	1%	5%	3%	6%	2%	4%
	Total	4377	1997	886	840	36	80	204	1855

Prepared by Anthology Research

Q: What was your approximate annual household income, before taxes?

TRAVEL PARTY

Friend/ Assoc: 40%
Spouse: 33%
Child <18: 19%
Other Adult family: 13%
Girlfriend/ Boyfriend: 8%
Officemate: 7%
Child- adult: 2%
Alone: 2%

Q: In addition to yourself, on this trip, who else was in your travel party?
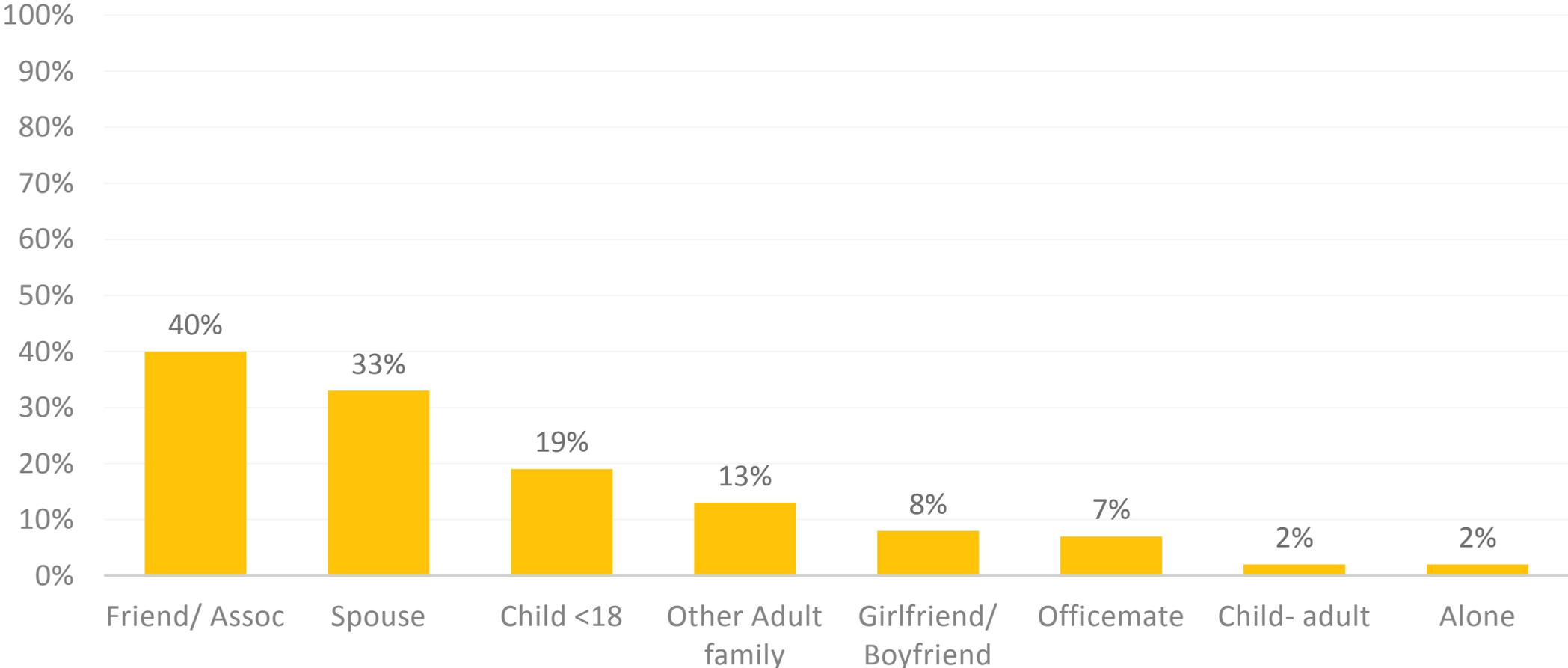
TRAVEL PARTY – TRACKING
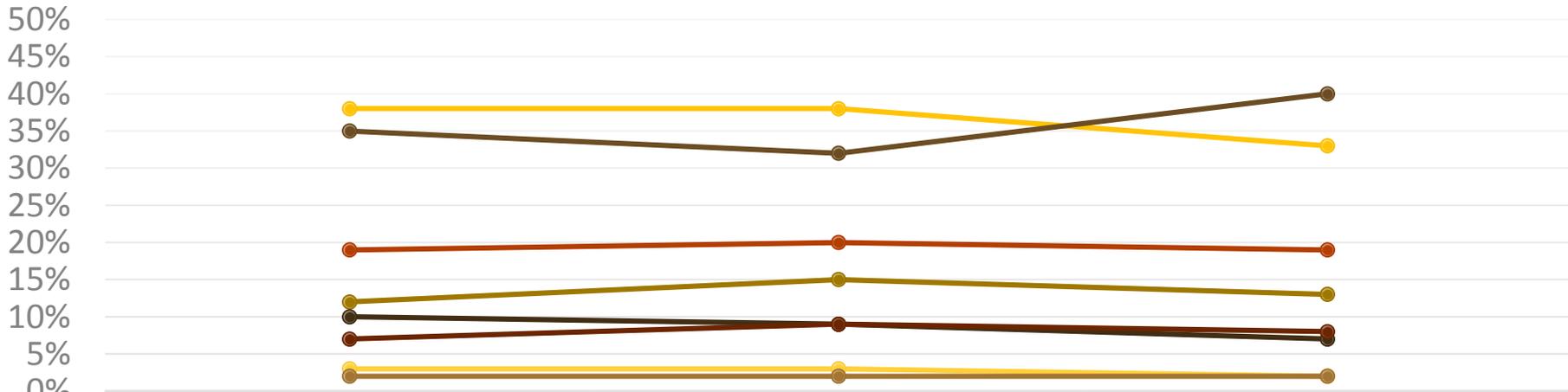
	2017	2018	2019
Spouse	38%	38%	33%
Friend/ Assoc	35%	32%	40%
Child Under 18	19%	20%	19%
Other Adult Family	12%	15%	13%
Office	10%	9%	7%
Girlfriend/ Boyfriend	7%	9%	8%
Child- Adult	3%	3%	2%
Alone	2%	2%	2%

Q: In addition to yourself, on this trip, who else was in your travel party?

[A]

GUAM VISITORS BUREAU

GUAM

TRAVEL PARTY – CHILD UNDER 18

19% Traveling with a child

5%	8%	9%	4%
0-2 years old	3-6 years old	7-11 years old	12-18 years old

Q : In addition to yourself, on this trip, who else was in your travel party?

TRAVEL PARTY SIZE

Three or more, 45%

Alone, 2%

Two persons, 54%

Mean = 4.14
Median = 2

Q : Including yourself, how many people traveled with you in your immediate party?
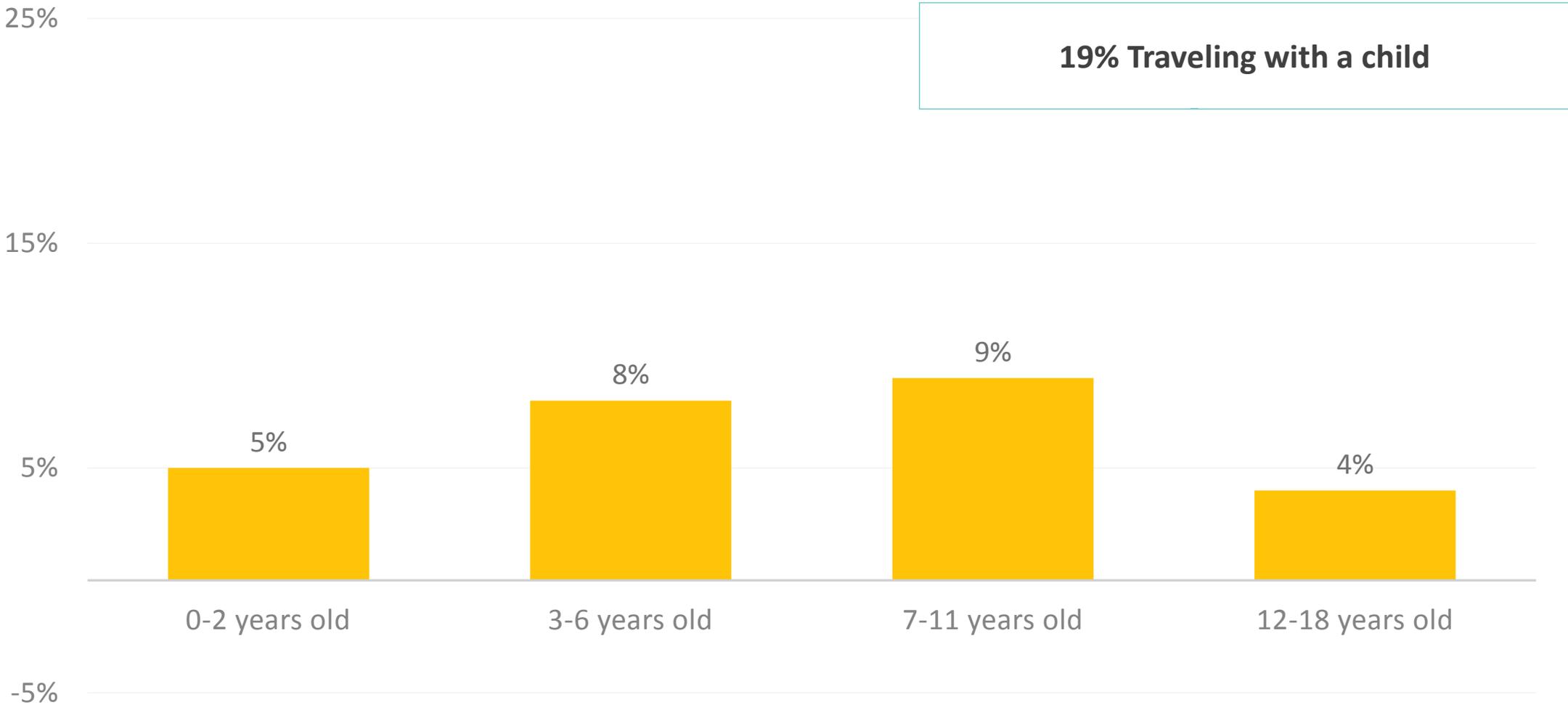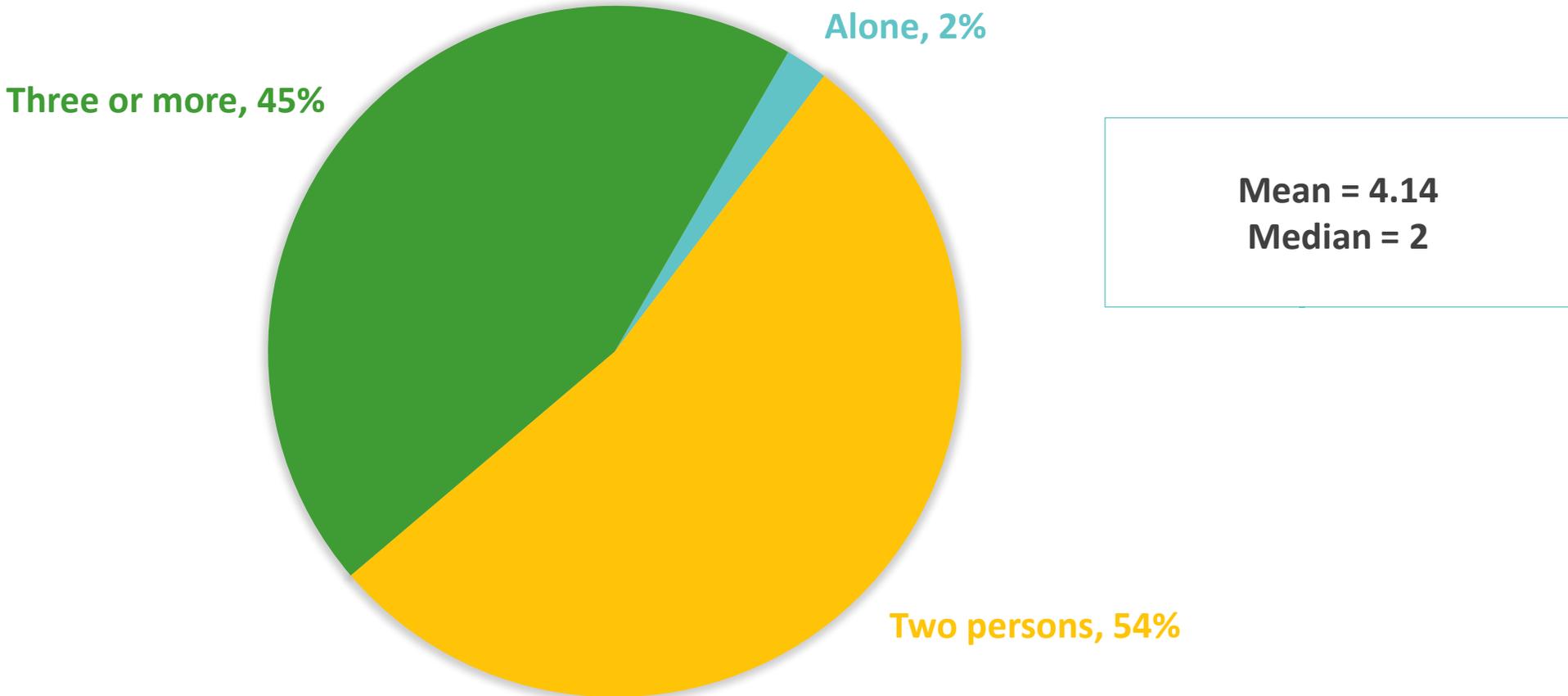
TRAVEL PARTY SIZE – TRACKING

	FY2019	FY2020
—●—MEAN	4.14	
—●—MEDIAN	2	

Q : Including yourself, how many people traveled with you in your immediate party?
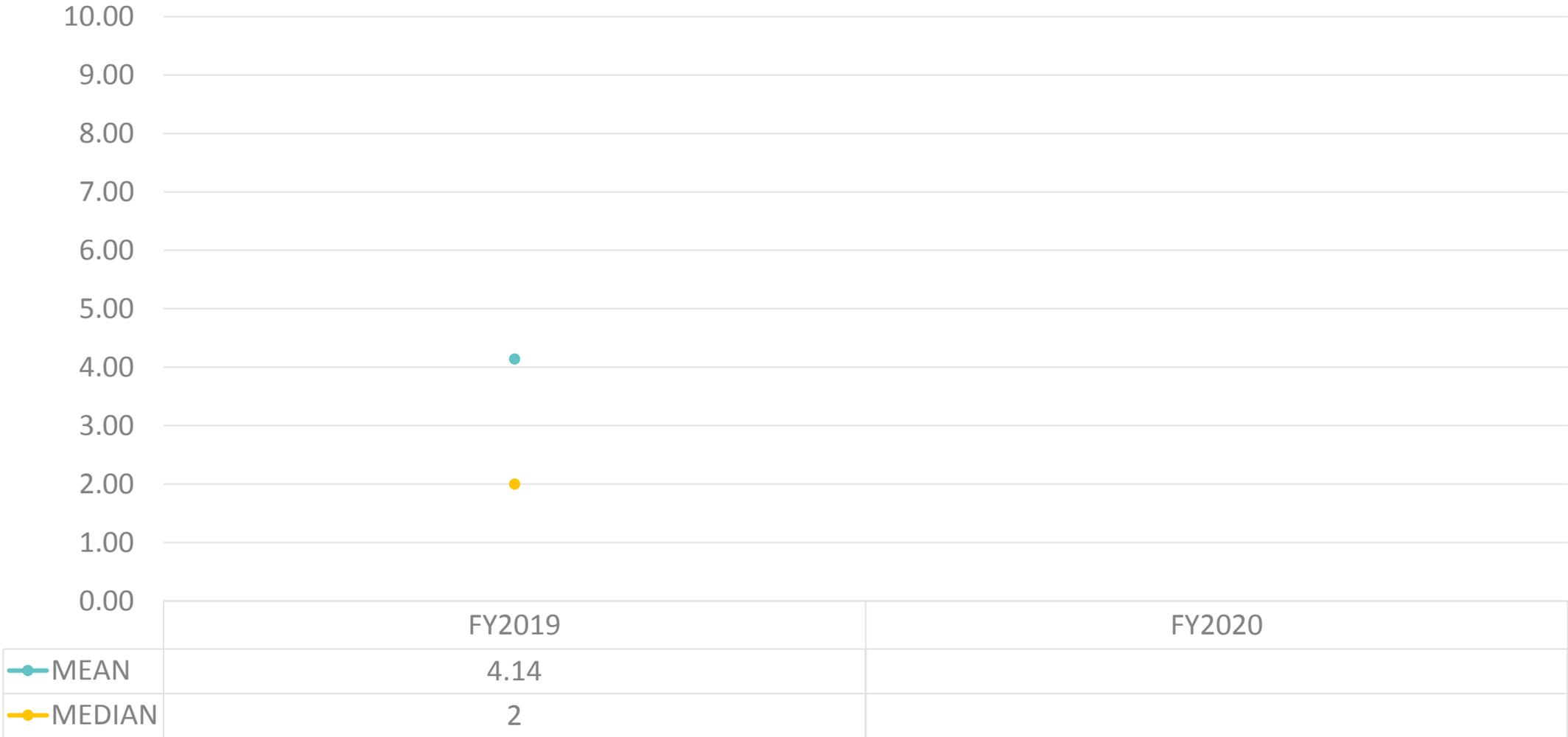
TRIPS TO GUAM

Mean = 2.44
Median = 1
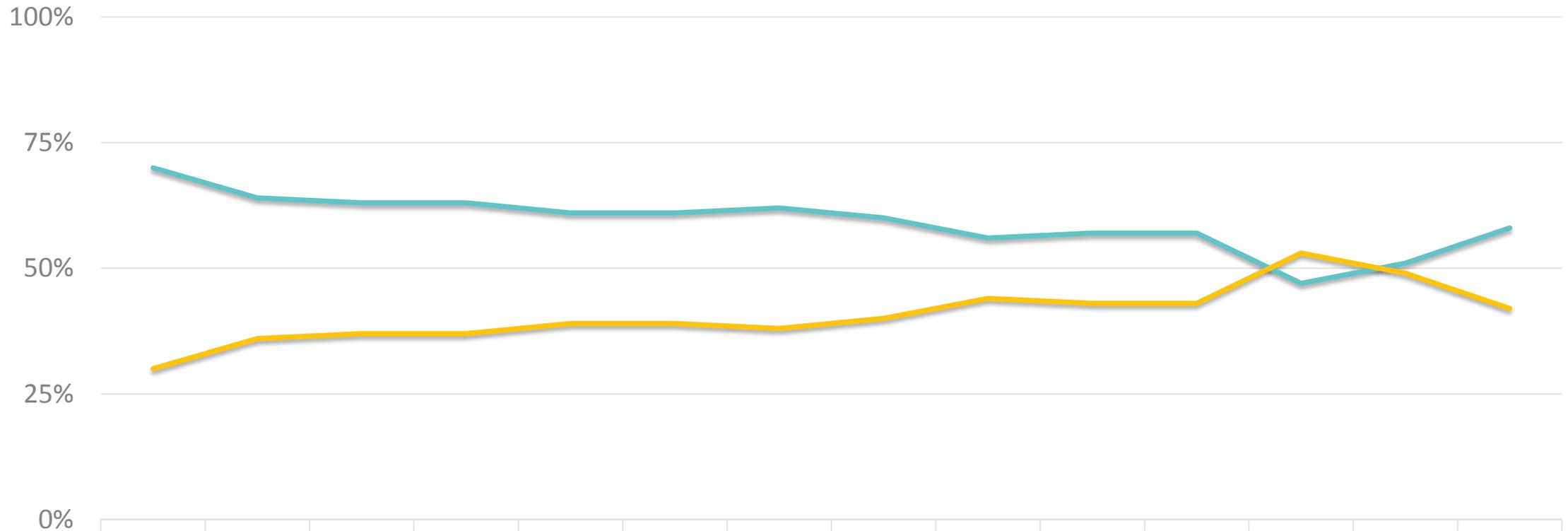
Repeat
42%

1st Time
58%

Q : Including this trip, how many times have you visited Guam?

TRIPS TO GUAM – TRACKING

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
1st Time	70%	64%	63%	63%	61%	61%	62%	60%	56%	57%	57%	47%	51%	58%
Repeat	30%	36%	37%	37%	39%	39%	38%	40%	44%	43%	43%	53%	49%	42%

23 *Q: Including this trip, how many times have you visited Guam?*

GVB VISITOR SATISFACTION STUDY
Q9 Including this trip, how many times have you been to Guam?

		TOTAL	FAMILY	OFFICE LADY	GROUP TOUR	MICE	SILVER	WEDDING	REPEAT
		-	-	-	-	-	-	-	-
Q9	1st time	58%	49%	56%	59%	56%	32%	69%	
	Repeat	42%	51%	44%	41%	44%	68%	31%	100%
	Total	4426	2019	900	847	36	81	204	1872
Q9	Mean	2.44	2.82	2.68	2.62	2.47	5.43	1.50	4.41
	Median	1	2	1	1	1	2	1	3

Prepared by Anthology Research
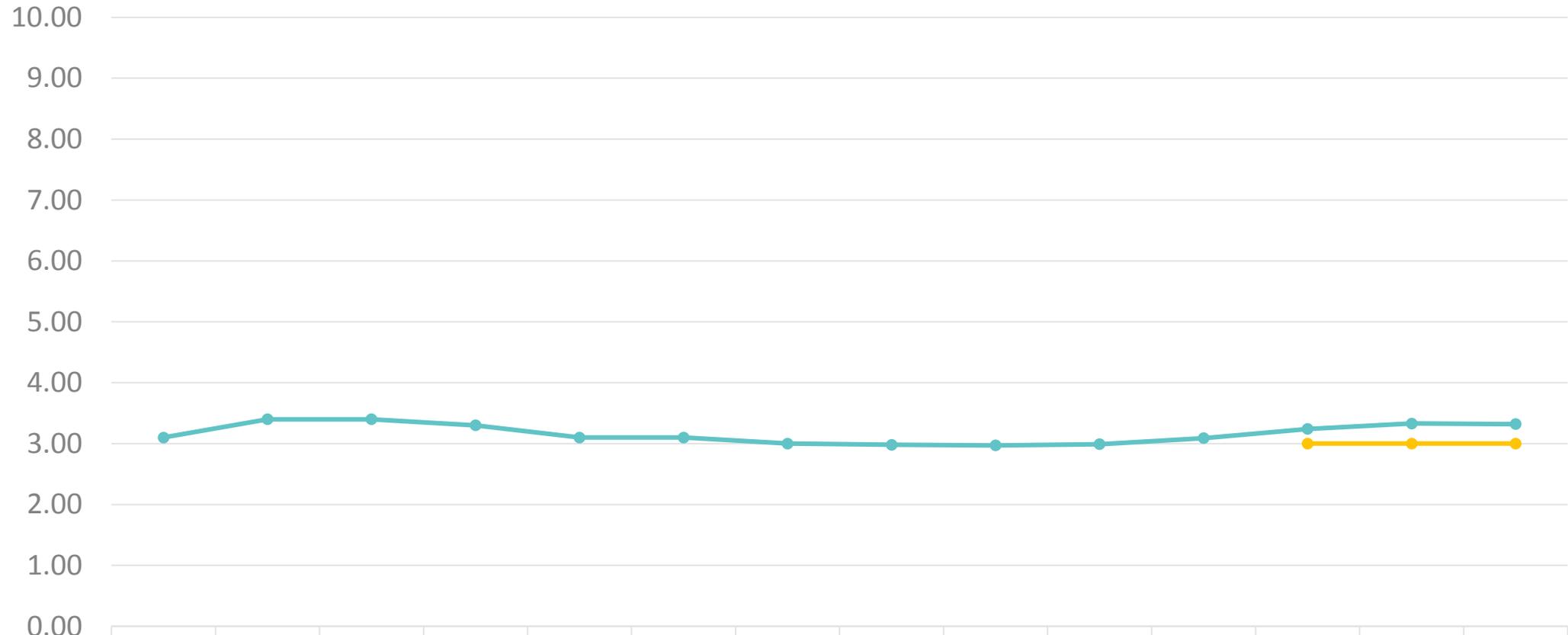
Q: Including this trip, how many times have you visited Guam?

LENGTH OF STAY

Mean number of nights = 3.32
Median number of nights = 3

One to two nights: 14%
Three nights: 59%
Four or more nights: 28%

Q: How many nights did you stay on Guam?

LENGTH OF STAY – TRACKING

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
MEAN	3.10	3.40	3.40	3.30	3.10	3.10	3.00	2.98	2.97	2.99	3.09	3.24	3.33	3.32
MEDIAN												3	3	3

Q : Including yourself, how many people traveled with you in your immediate party?

GVB VISITOR SATISFACTION STUDY
SA How many nights did you stay on Guam?

		TOTAL	FAMILY	OFFICE LADY	GROUP TOUR	MICE	SILVER	WEDDING	REPEAT
		-	-	-	-	-	-	-	-
SA	1-2 nights	14%	8%	16%	15%	22%	12%	17%	14%
	3 nights	59%	54%	58%	63%	56%	54%	49%	55%
	4+	28%	39%	26%	22%	22%	33%	34%	31%
	Total	4426	2019	900	847	36	81	204	1872
SA	Mean	3.32	3.54	3.19	3.27	3.28	3.74	3.36	3.43
	Median	3	3	3	3	3	3	3	3

Prepared by Anthology Research

OCCUPATION – Top Responses (10%+)

20%	17%	14%	12%
Company: Non-Mgr	Student	Company: Engineer	Company: Sales

Q: What is your occupation?
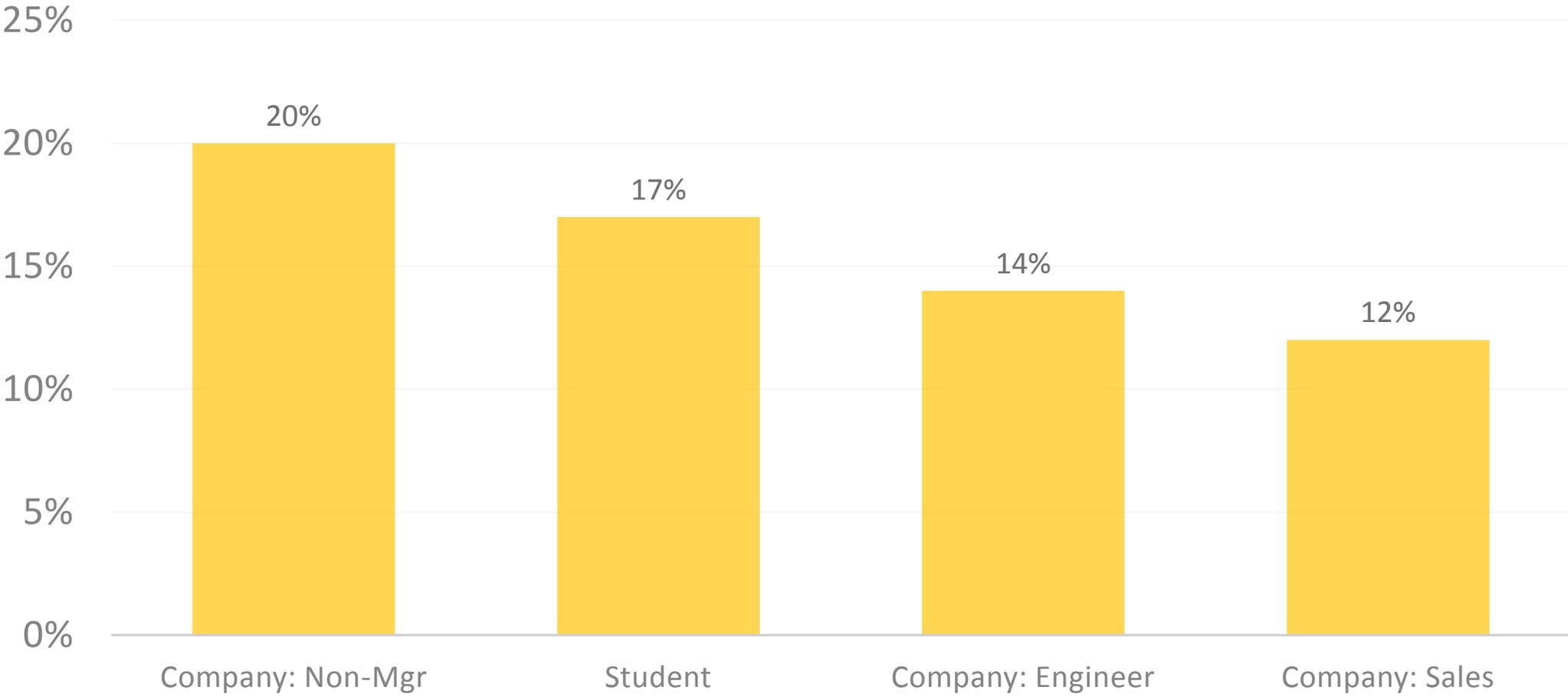
SECTION 2
TRAVEL PLANNING

ORGANIZED TOUR GROUP

**Organized tour group
19%**

**No
81%**

Q: On this trip, I am a member of an organized tour group?
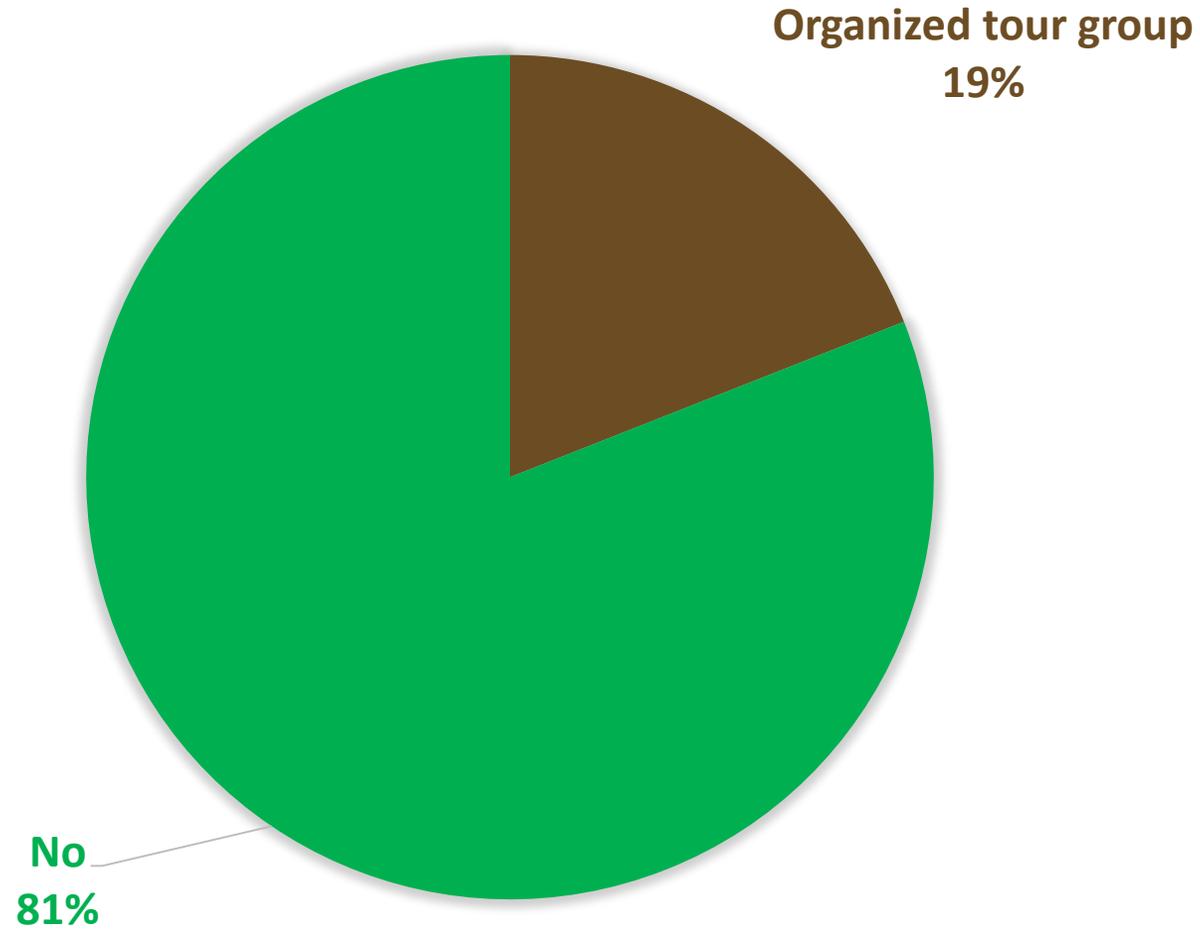
ORGANIZED TOUR GROUP – TRACKING
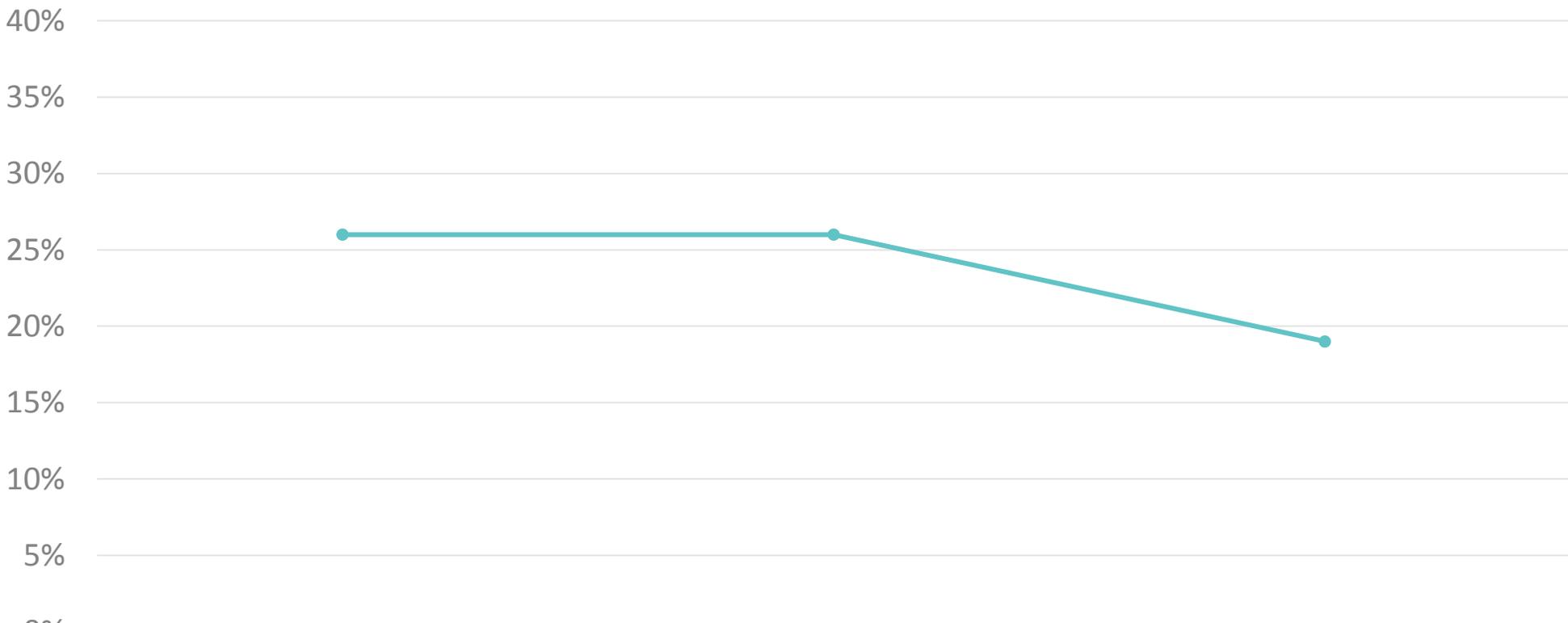
	FY2017	FY2018	FY2019
Organized Group Tour	26%	26%	19%

Q: On this trip, I am a member of an organized tour group?

ONLINE BOOKING

No, 38%

**Made Arrangements
Online, 62%**

Q: Did you book any of your travel arrangements online?

ONLINE BOOKING – TRACKING

	FY2019	FY2020
Online Booking	62%	

Q: Did you book any of your travel arrangements online?

TRAVEL ARRANGEMENTS

Q: How did you book your travel arrangements to Guam?
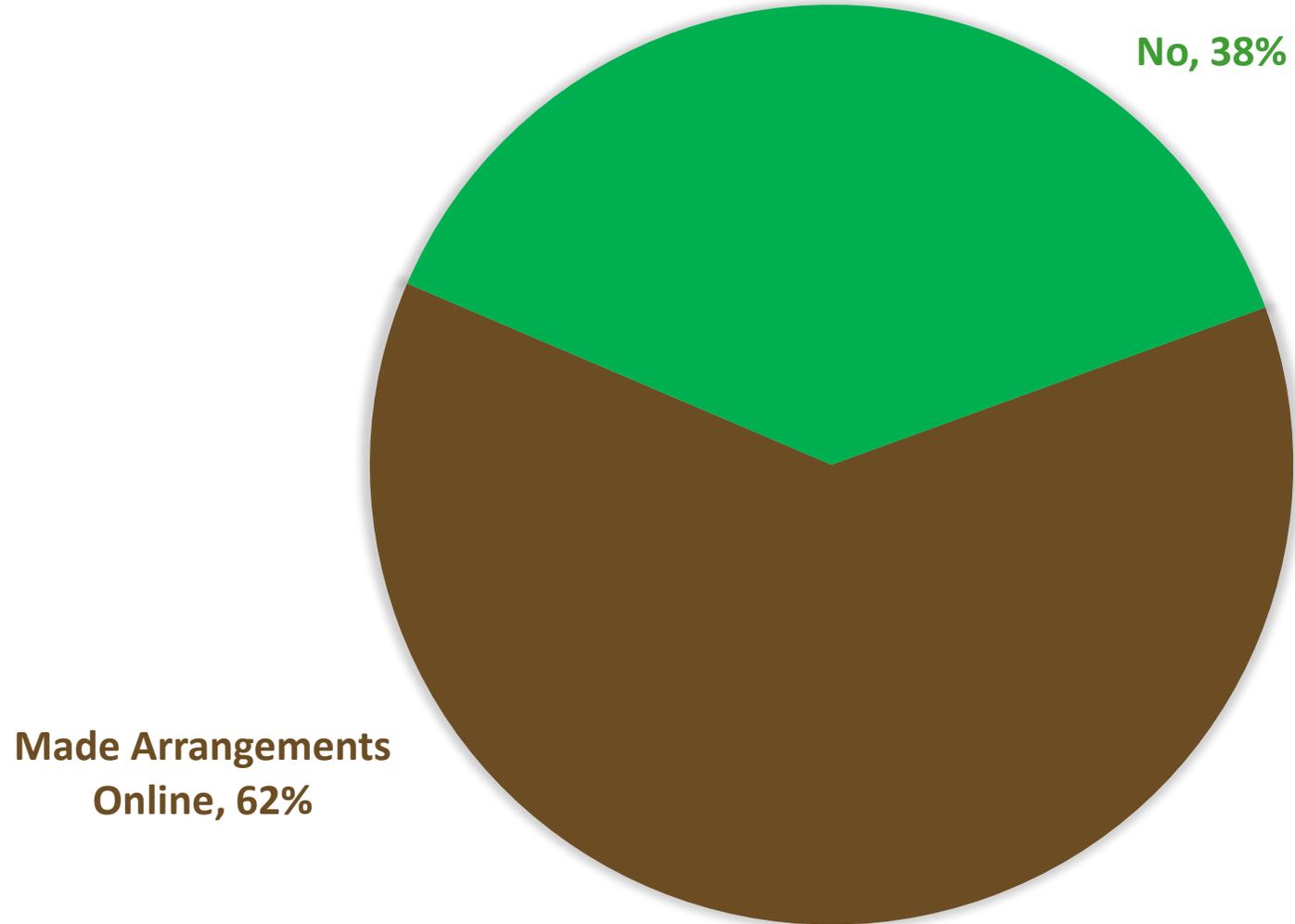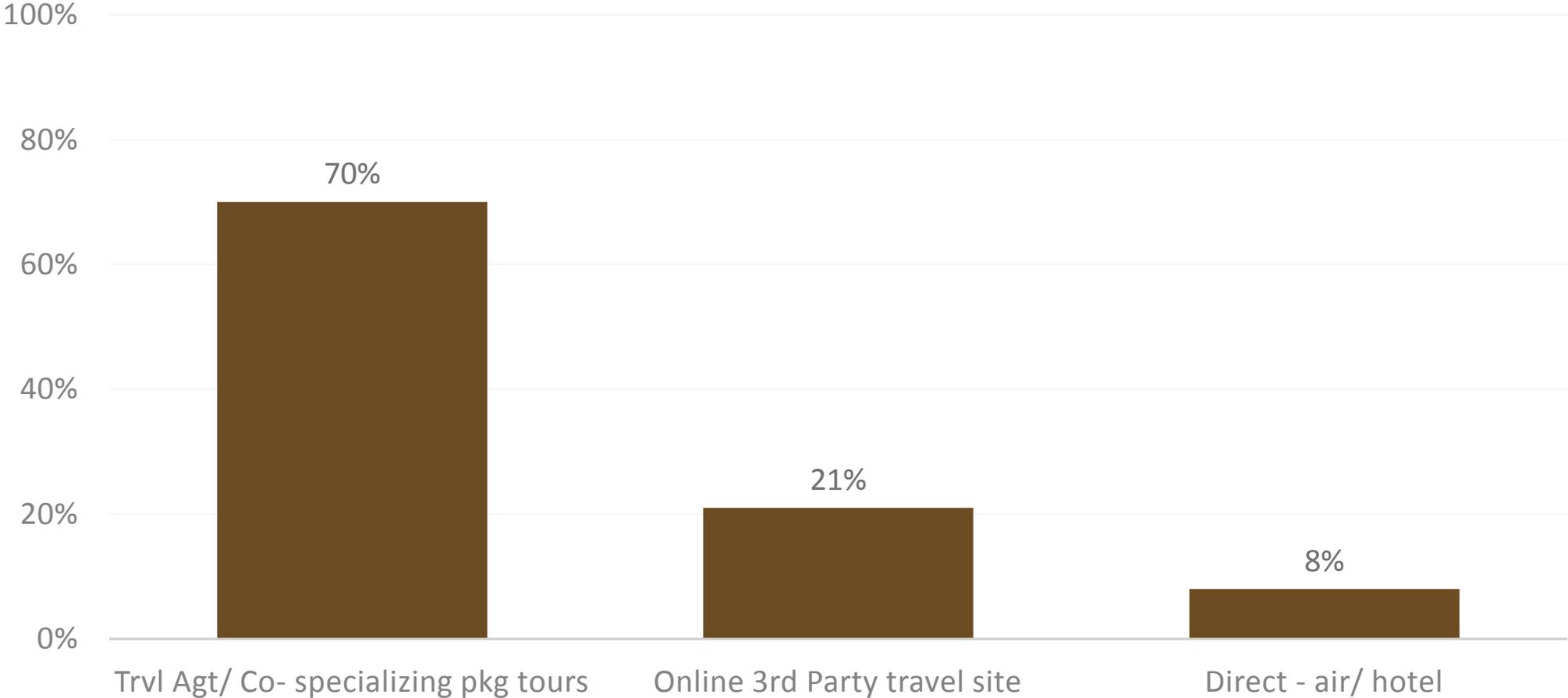
TRAVEL ARRANGEMENTS – TRACKING

	FY2019	FY2020
Trvl Agt/ Co- Pkg Tour	70%	
Online 3rd Party	21%	
Direct Air/ Hotel	8%	

Q: How did you book your travel arrangements to Guam?

PREPAID PACKAGE TRIP

No
18%

Prepaid Package Trip
82%

Q: Are you on a prepaid package trip that includes at least airfare and hotel?

PREPAID PACKAGE TRIP

	FY2017	FY2018	FY2019
Prepaid Pkg Trip	88%	86%	82%

Q: Are you on a prepaid package trip that includes at least airfare and hotel?

ACCOMMODATIONS (5%+)

12%	11%	7%	6%	6%	5%	5%	5%	5%	5%
Outrigger Guam Resort	Guam Plaza	PIC	Hotel Nikko	Guam Reef & Olive	Pacific Star	Holiday Resort	Onward Beach Resort	Hilton Guam	Grand Plaza

Q: Where did you stay while on Guam?

TRAVEL MOTIVATIONS (10%+)

Bar chart:

Motivation	Percentage
Short Travel Time	44%
Vacation	38%
Natural Beauty	38%
Sightseeing	23%
Prior Trip- Positive	20%
Relax	17%
Price	17%
Shopping	13%
Recommendation	11%

Q: What top three reasons motivated you to travel to Guam on this trip?

TRAVEL MOTIVATIONS – Top 3

FY2018	FY2019
70% Natural Beauty 45% Short Travel Time 28% Pleasure/Vacation	44% Short Travel Time 38% Vacation 38% Natural Beauty

Q: What top three reasons motivated you to travel to Guam on this trip?

GVB VISITOR SATISFACTION STUDY
Q8 What top three reasons motivated you to travel to Guam on this trip?

		TOTAL	FAMILY	OFFICE LADY	GROUP TOUR	MICE	SILVER	WEDDING	REPEAT
		-	-	-	-	-	-	-	-
Q8	Short travel time (not too far from home)	44%	54%	48%	34%	14%	42%	19%	46%
	Vacation	38%	35%	39%	29%	11%	32%	11%	36%
	Beautiful seas, beaches, tropical climate	38%	37%	36%	26%	17%	17%	16%	33%
	Sightseeing/ visiting tourist spots	23%	15%	19%	22%	8%	13%	14%	13%
	A previous visit	20%	27%	21%	18%	8%	28%	7%	49%
	Price of the tour package	17%	15%	17%	16%	3%	12%	2%	15%
	Just to relax	17%	18%	18%	10%	8%	20%	4%	17%
	Shopping	13%	10%	13%	10%	3%	12%	6%	12%
	Recommendation of friend/ relative/ travel agency	11%	8%	10%	12%	3%	15%	5%	7%
	Water sports (snorkeling, windsurfing, parasailing)	9%	9%	7%	5%		8%	2%	7%
	To Get Married/ attend Wedding	6%	11%	6%	9%		18%	100%	5%
	Honeymoon	6%	13%	7%	4%			27%	3%
	It is a safe place to spend a vacation	5%	6%	4%	5%	6%	12%	1%	5%
	Company/ business trip	4%	1%	6%	19%	14%	2%		4%
	Scuba diving	3%	2%	2%	2%		5%	2%	3%
	To visit friends or relatives	2%	2%	2%	2%	3%	3%	2%	3%
	To golf	1%	2%	1%	2%		8%	1%	3%
	Travel shows/ agents	1%	1%	1%	2%			1%	1%
	Organized sporting activity/ event	1%	1%	2%	2%		5%	0%	2%
	Adventure	1%	0%	1%	0%		2%	1%	1%
	Incentive trip	1%	0%	1%	3%	81%	5%		1%
	Shop Guam e-Festival	1%	1%	1%	1%			0%	1%
	School trip	0%	0%	0%	1%				0%
	Career certification/ testing	0%	0%	1%	1%			0%	1%
	Convention/ conference/ trade show/ meeting	0%	0%			0%	19%	2%	0%
	Government or military	0%		0%	0%				0%
	Medical	0%	0%						0%
	Magazines/ newspapers/ publications	0%	0%						0%
	Social Media networks	0%		0%					
	Total	3333	1468	622	633	36	60	204	1373

Prepared by Anthology Research

Q: What top three reasons motivated you to travel to Guam on this trip?

SECTION 3
EXPENDITURES

PREPAID PACKAGE EXPENDITURES

- $2,133.03 = overall mean average prepaid package expense (for entire travel party) by respondent

- $724.87 = overall mean average **per person** prepaid package expenditures

Q: How much did the total prepaid package trip cost for you and other members of your covered travel party?

PREPAID PACKAGE – TRAVEL PARTY EXPENSE TRACKING
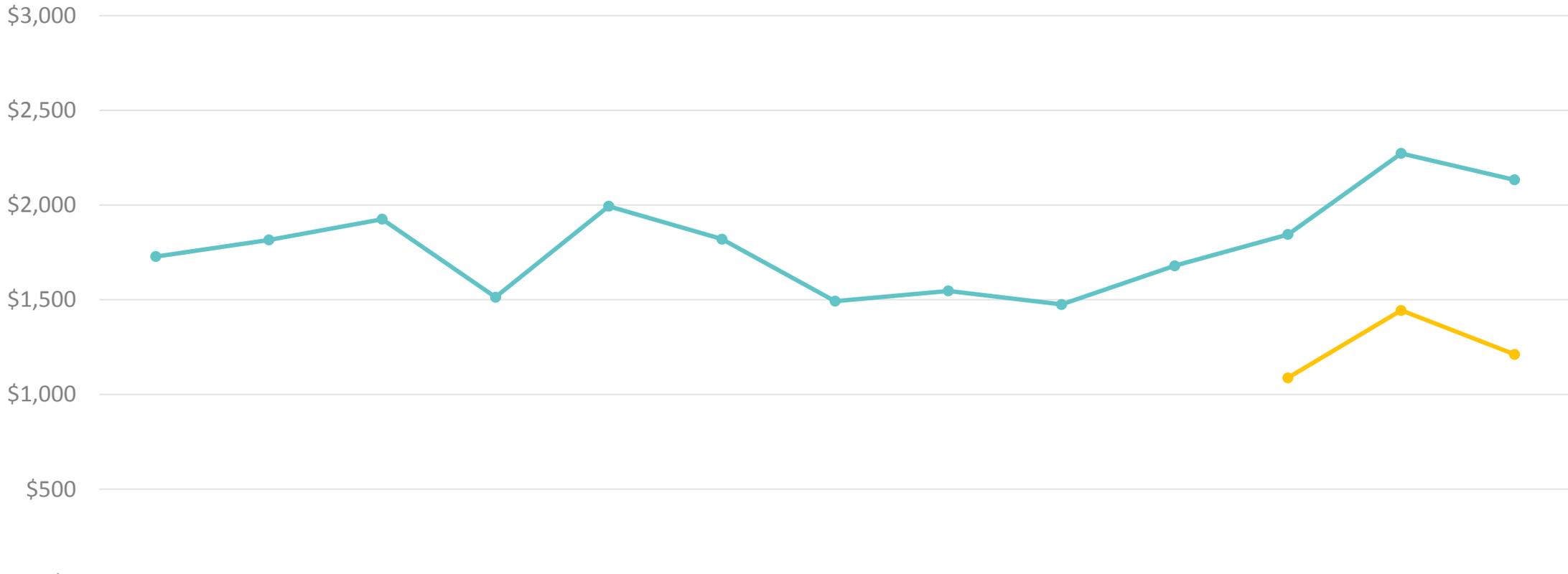
	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
MEAN	$1,728.00	$1,816.00	$1,925.00	$1,513.90	$1,993.70	$1,820.20	$1,492.88	$1,546.41	$1,475.15	$1,679.34	$1,844.75	$2,272.20	$2,133.03
MEDIAN											$1,088.00	$1,444.00	$1,212.00

PREPAID PACKAGE – PER PERSON EXPENSE TRACKING
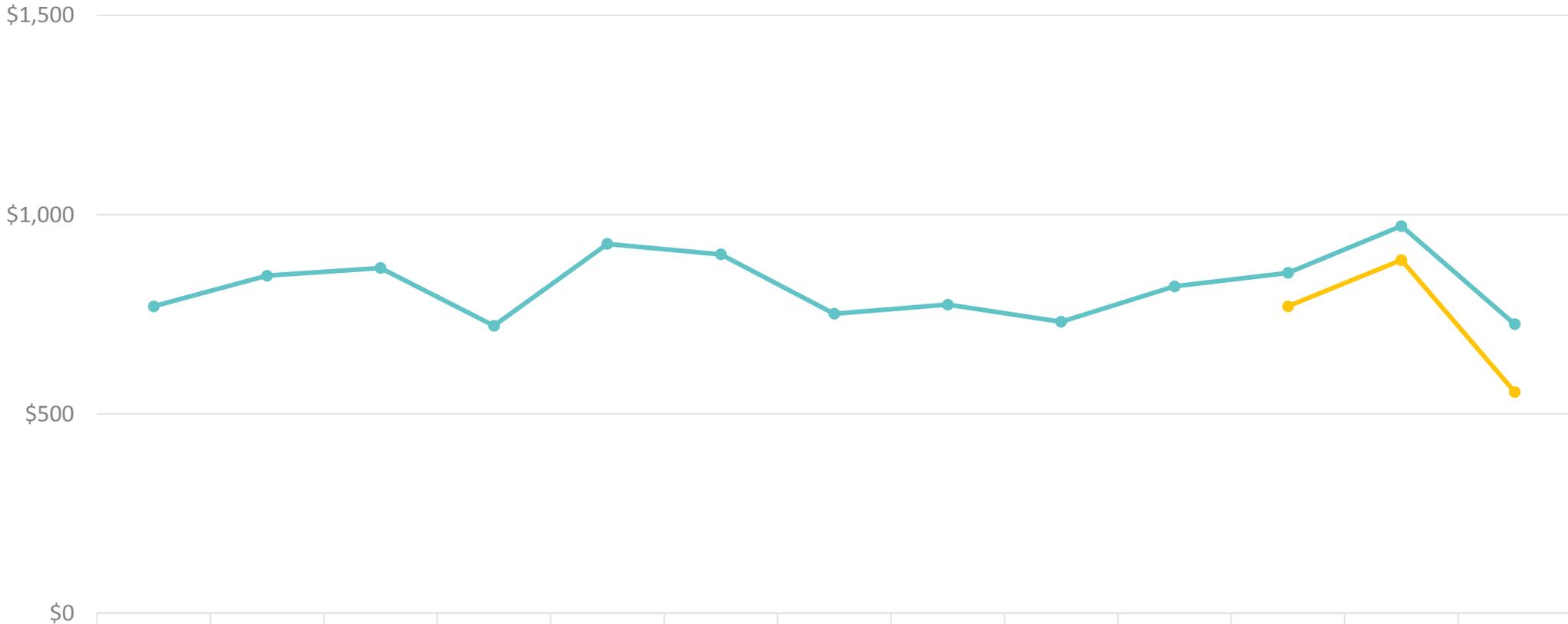
	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
MEAN	$769.79	$846.79	$865.94	$720.90	$926.60	$900.30	$751.20	$774.17	$731.16	$820.05	$853.76	$971.25	$724.87
MEDIAN											$770.00	$886.00	$555.00

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PREPAID PACKAGE – PER PERSON EXPENSE SEGMENTATION

GVB VISITOR SATISFACTION STUDY

Q20 How much did the total prepaid package trip cost for you and other members of your covered travel party? PER PERSON

		TOTAL	FAMILY	OFFICE LADY	GROUP TOUR	MICE	SILVER	WEDDING	REPEAT
		-	-	-	-	-	-	-	-
PREPAID PKG PER PERSON	Mean	$724.87	$996.56	$777.05	$594.68	$394.15	$702.07	$1,076.76	$751.31
	Median	$555	$896	$590	$371	$50	$672	$744	$614

Prepared by Anthology Research

Q: How much did the total prepaid package trip cost for you and other members of your covered travel party?

PREPAID PACKAGE – BREAKDOWN

Legend: ■ MEAN ■ MEDIAN

	Airfare	Lodging	Other
MEAN	$1,040.07	$997.51	$1,159.10
MEDIAN	$647	$538	$454

Q: (OPTTIONAL) Of the total prepaid package trip cost, how much went towards...?
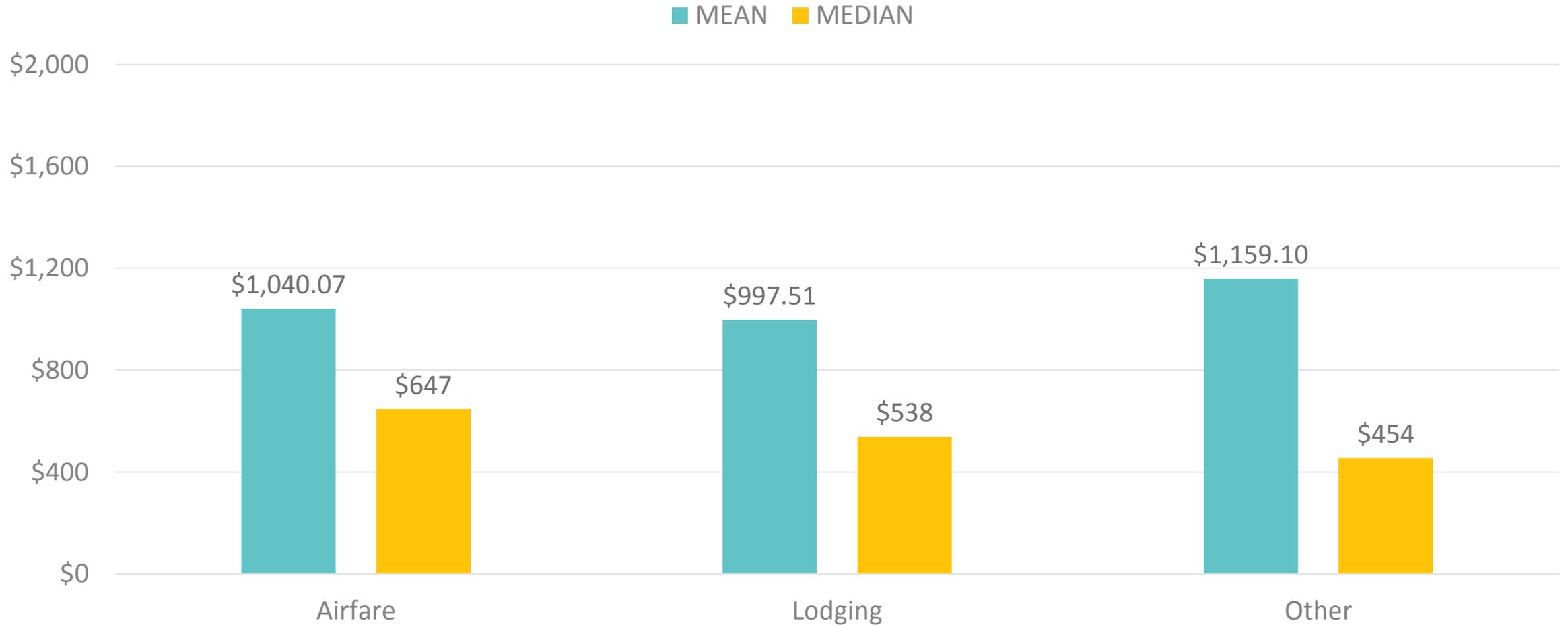
Prepaid – Tracking: Airfare
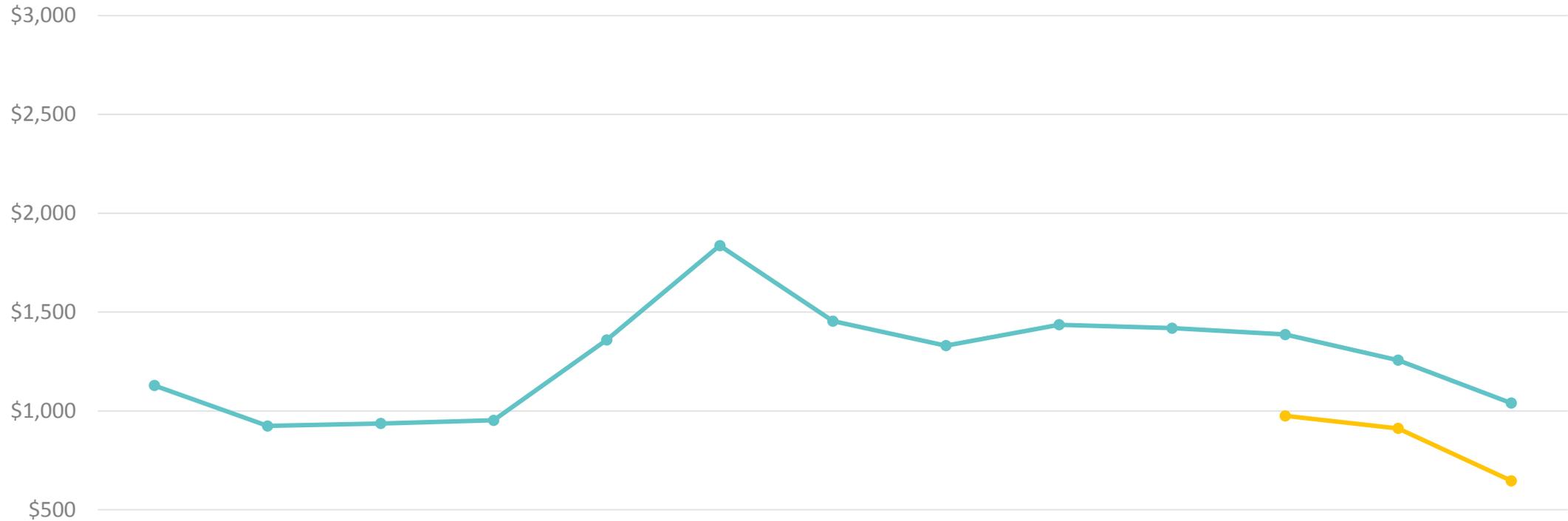
	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
MEAN	$1,129.0	$924.00	$937.00	$952.90	$1,359.6	$1,836.4	$1,454.4	$1,330.3	$1,435.9	$1,418.6	$1,387.1	$1,256.8	$1,040.0
MEDIAN											$975.00	$912.00	$647.00

Prepaid – Tracking: Accommodations
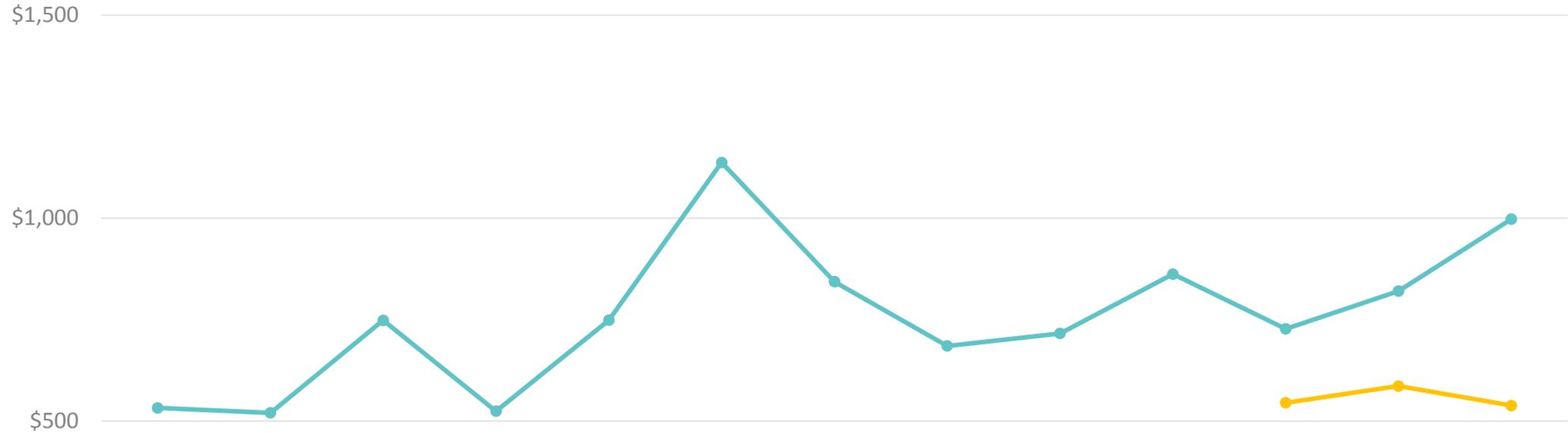
	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
MEAN	$532.00	$520.00	$748.00	$524.00	$748.30	$1,136.9	$843.15	$684.83	$715.78	$861.75	$727.03	$819.98	$997.51
MEDIAN											$545.00	$586.00	$538.00

PREPAID PACKAGE – BREAKDOWN

Q: What did the package trip include?
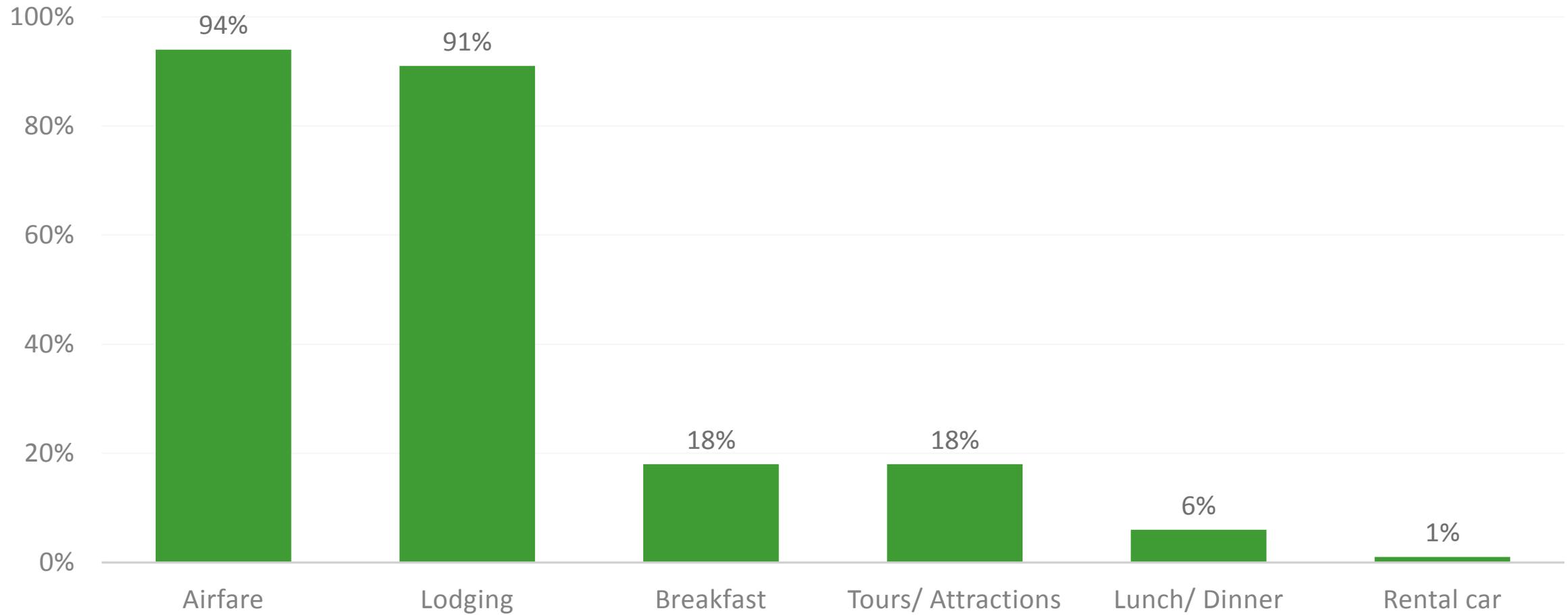
AIRFARE – FIT TRAVELER

- $1,535.46 = overall mean average airfare expense (for entire travel party) by respondent

- $683.80 = overall mean average **per person** airfare expenditures

Q: How much of the total did you and your family/ travel party pay for the airline trip costs to Guam (if not included as part of a package)?

AIRFARE – FIT TRAVELER (GROUP) TRACKING

	FY2019	FY2020
━●━ MEAN	$1,535.46	
━●━ MEDIAN	$918.00	

Q: How much of the total did you and your family/ travel party pay for the airline trip costs to Guam (if not included as part of a package)?

[A] GUAM VISITORS BUREAU GUAM

AIRFARE – FIT TRAVELER (Per Person) TRACKING

	FY2019	FY2020
—●—MEAN	$638.80	
—●—MEDIAN	$508.00	

Q: How much of the total did you and your family/ travel party pay for the airline trip costs to Guam (if not included as part of a package)?

- $1,223.91 = overall mean average expense (for entire travel party) by respondent

- $559.57 = overall mean average **per person** expenditures

ONISLE – TRAVEL PARTY TRACKING
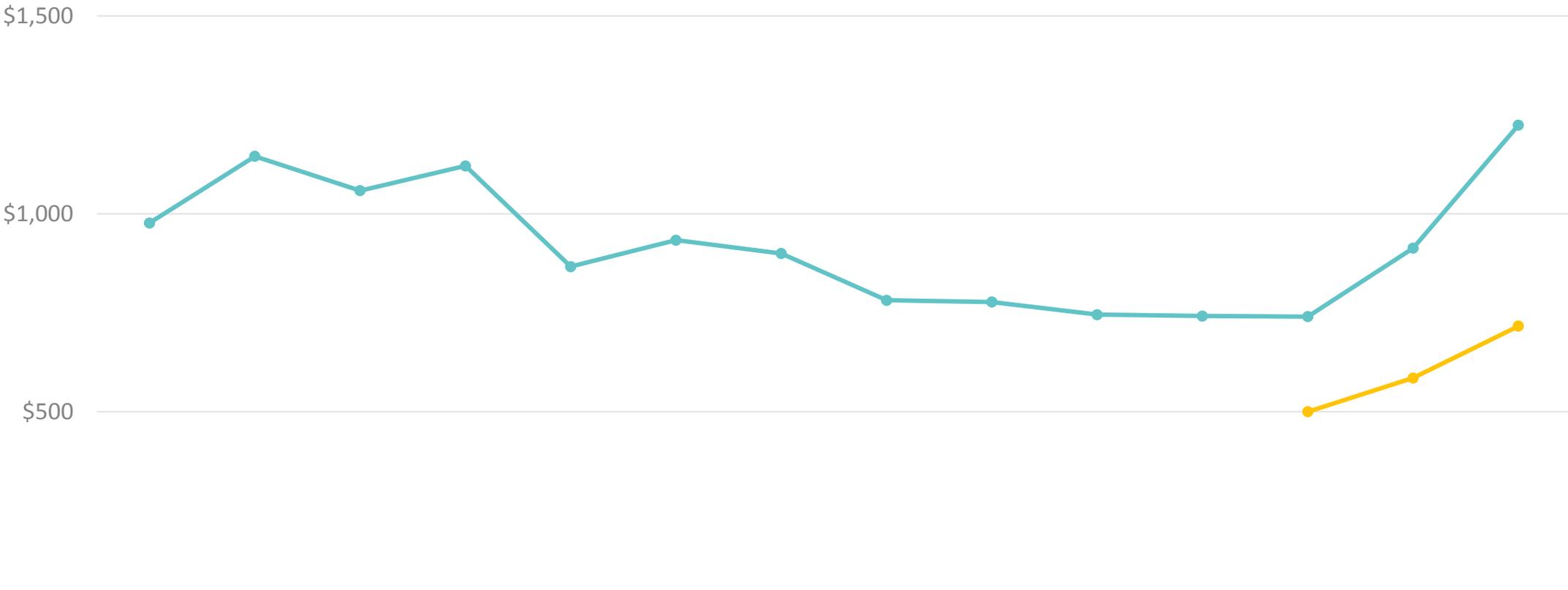
	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
MEAN	$976.60	$1,145.20	$1,058.30	$1,120.80	$866.50	$933.40	$899.50	$781.50	$777.05	$745.03	$741.74	$740.27	$913.06	$1,223.91
MEDIAN												$500.00	$585.00	$716.00

ONISLE – PER PERSON TRACKING
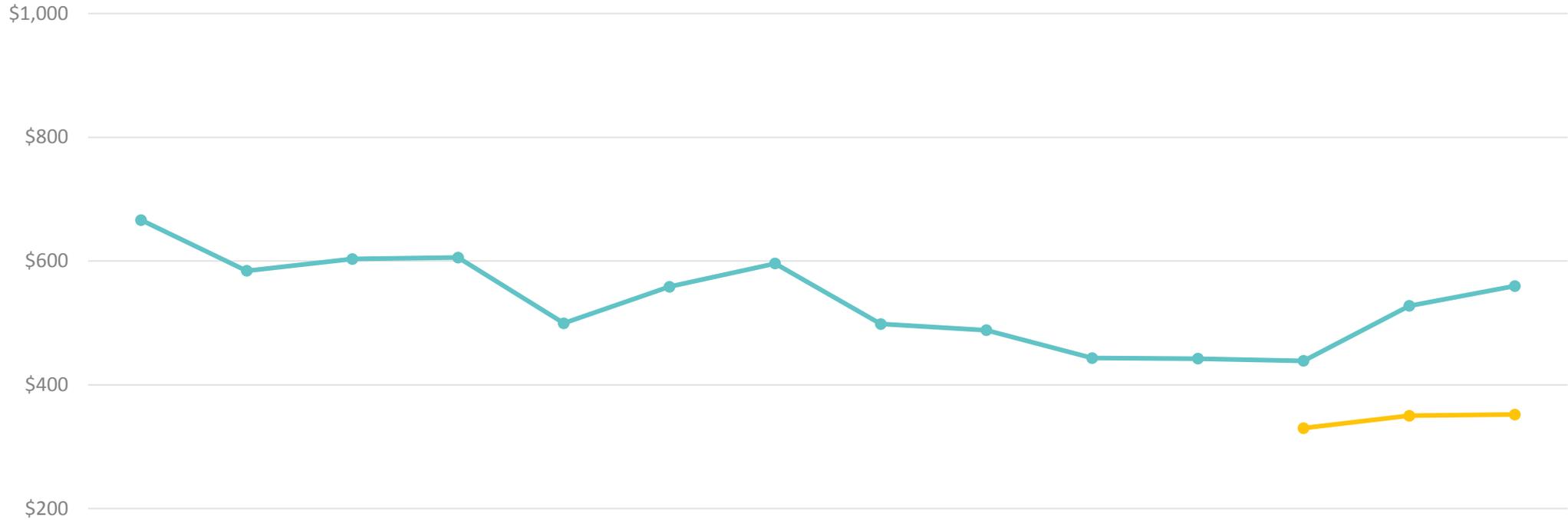
	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
MEAN	$666.21	$584.22	$603.26	$605.71	$499.40	$558.50	$596.00	$498.25	$488.15	$443.17	$442.27	$438.57	$527.47	$559.57
MEDIAN												$330.00	$350.00	$352.00

ONISLE – PER DAY SPENDING

Legend: ■ MEAN ■ MEDIAN

Chart — TRAVEL PARTY:
- MEAN: $388.13
- MEDIAN: $233

Chart — PER PERSON:
- MEAN: $180.50
- MEDIAN: $113

Y-axis: $0, $100, $200, $300, $400, $500, $600, $700, $800, $900, $1,000
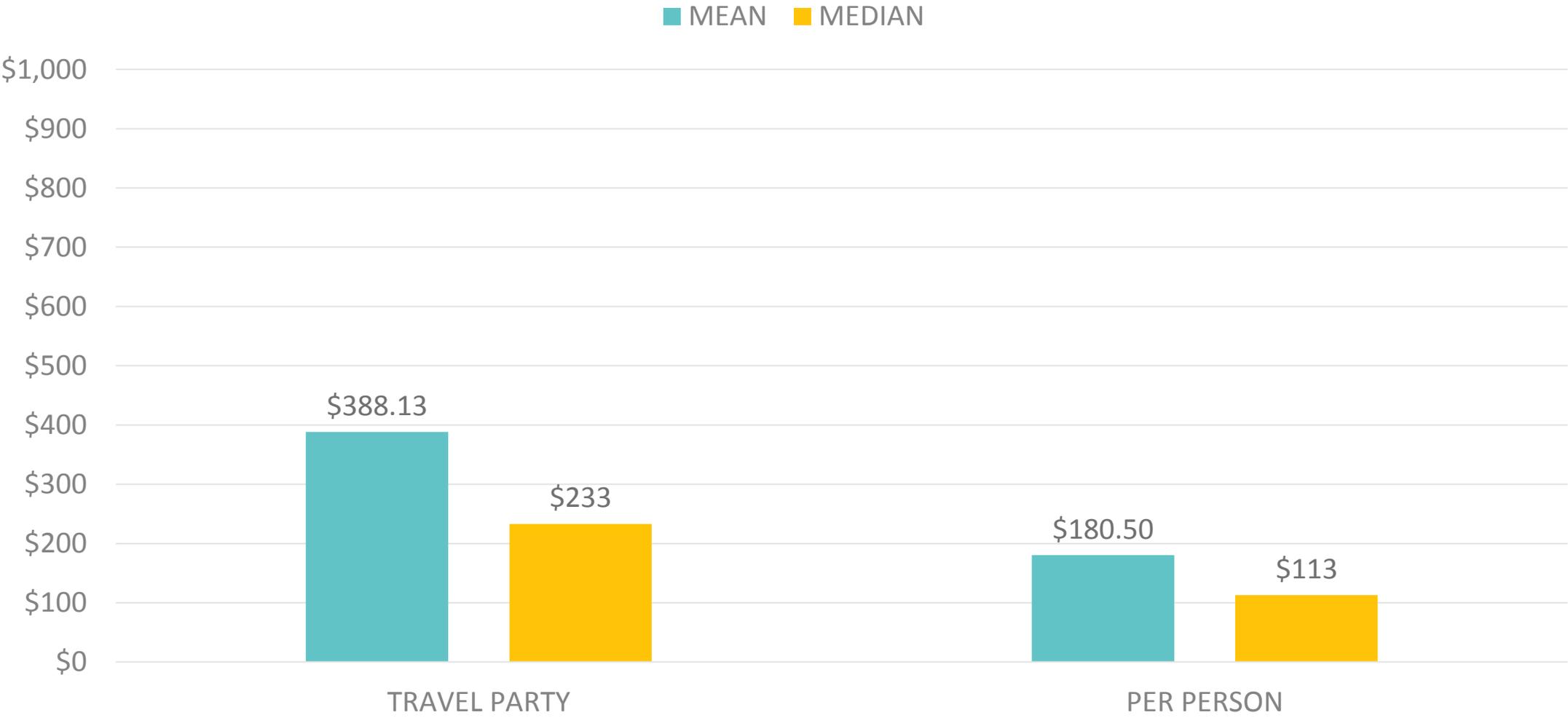
ONISLE – TRAVEL PARTY/ PER DAY TRACKING
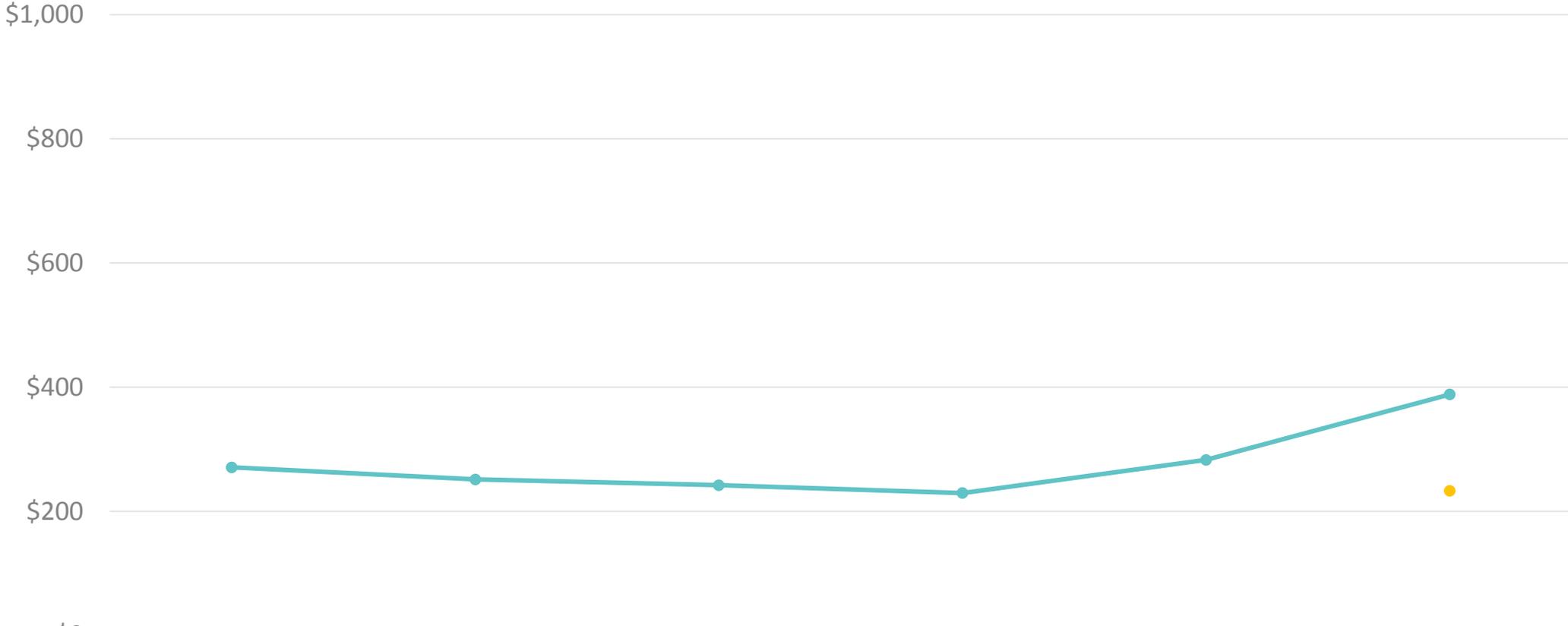
	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
MEAN	$270.78	$251.23	$242.07	$229.44	$282.71	$388.13
MEDIAN						$233.00

ONISLE – PER PERSON/ PER DAY TRACKING
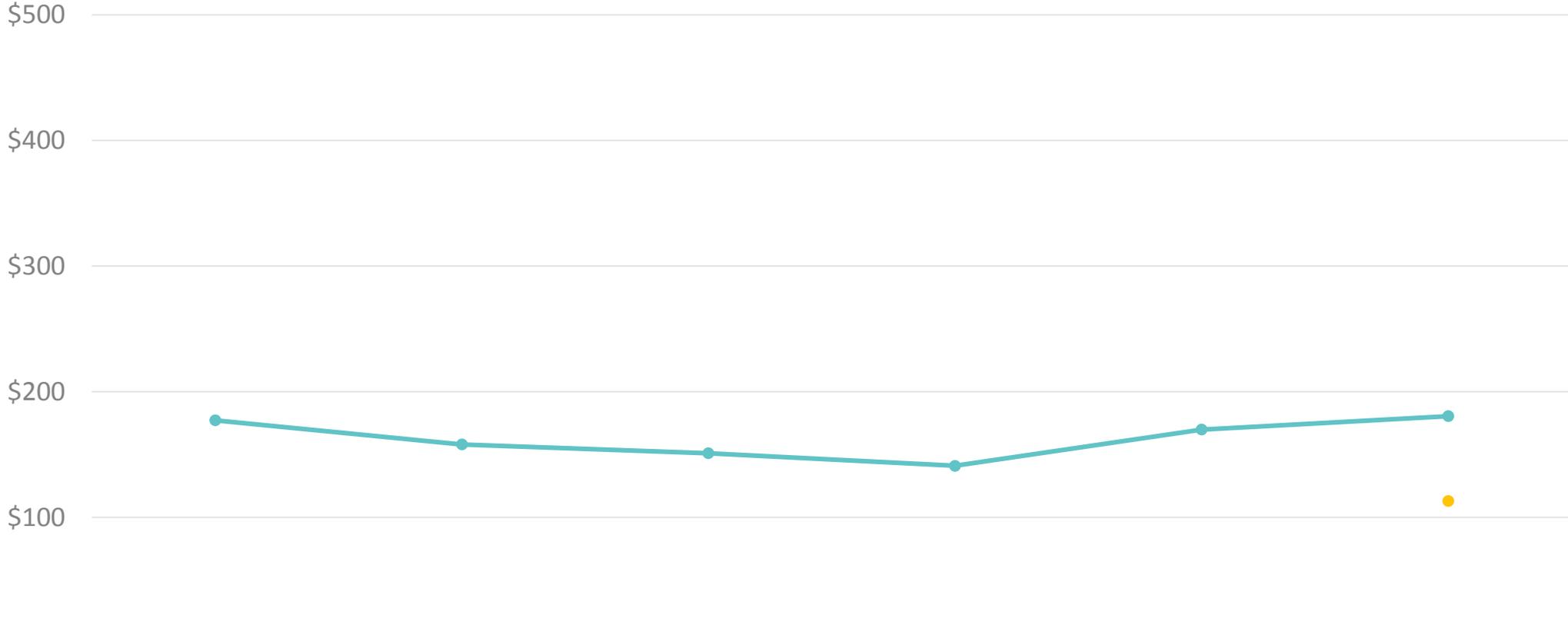
	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
MEAN	$177.23	$158.00	$151.03	$140.98	$169.87	$180.50
MEDIAN						$113.00

ONISLE – ACCOMMODATIONS

$571.08 — MEAN
$250.00 — MEDIAN

Q: How much additional did you and your family spend on Guam – Lodging?
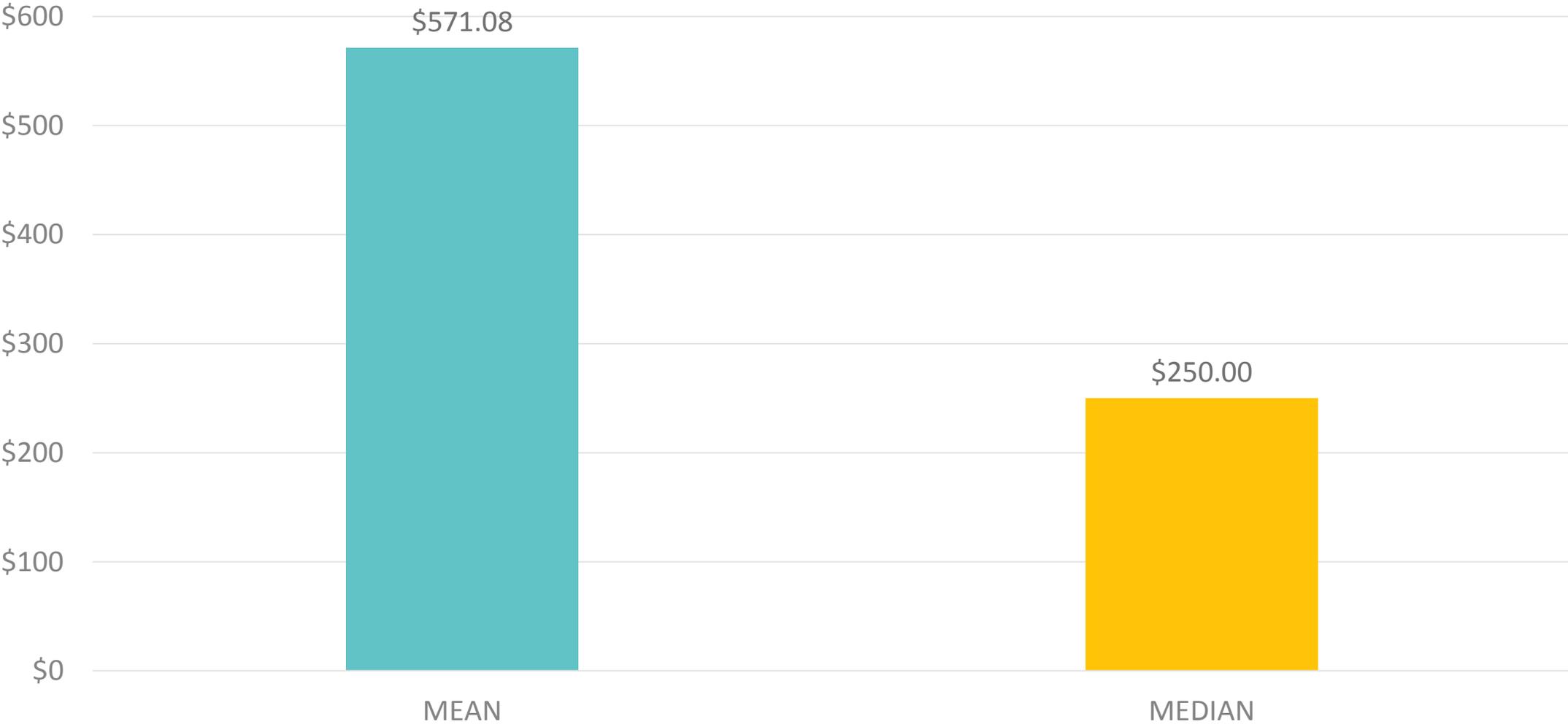
ONISLE – ACCOMMODATIONS TRACKING
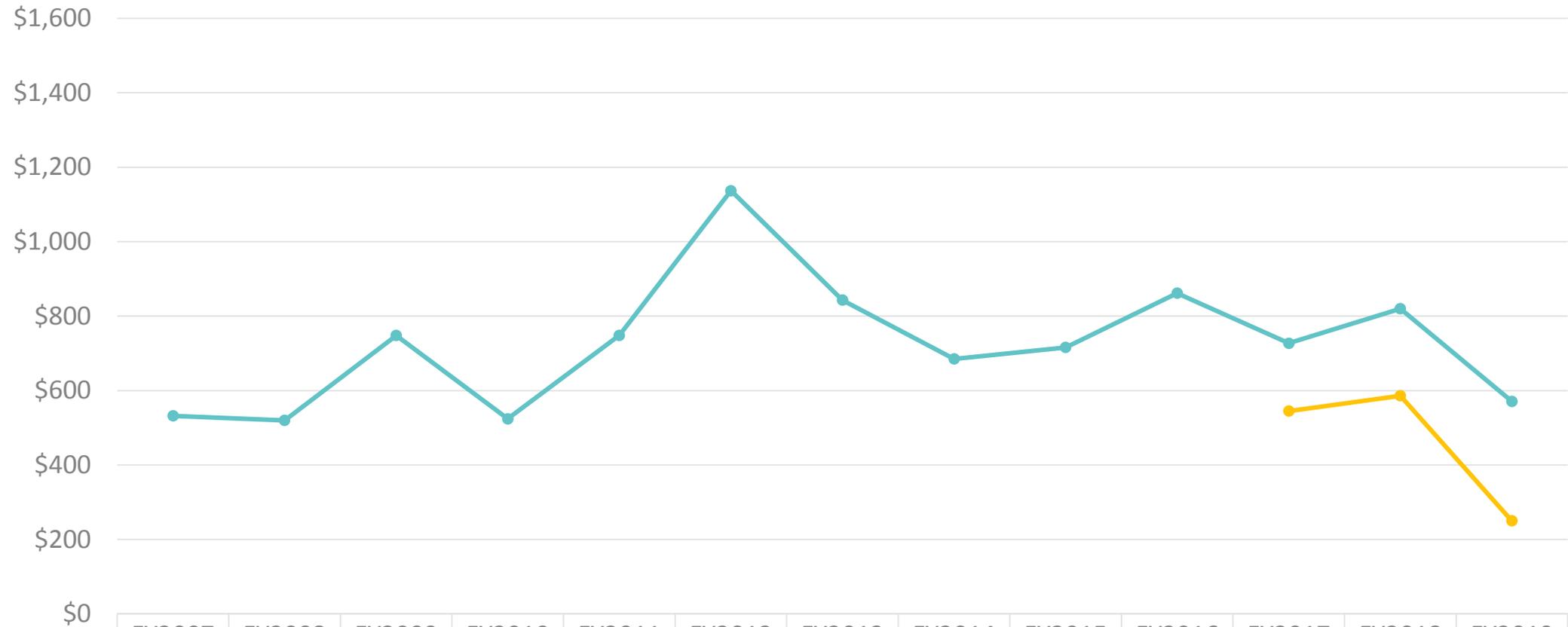
	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
MEAN	$532.00	$520.00	$748.00	$524.00	$748.30	$1,136.9	$843.15	$684.83	$715.78	$861.75	$727.03	$819.98	$571.08
MEDIAN											$545.00	$586.00	$250.00

Q: How much additional did you and your family spend on Guam – Lodging?
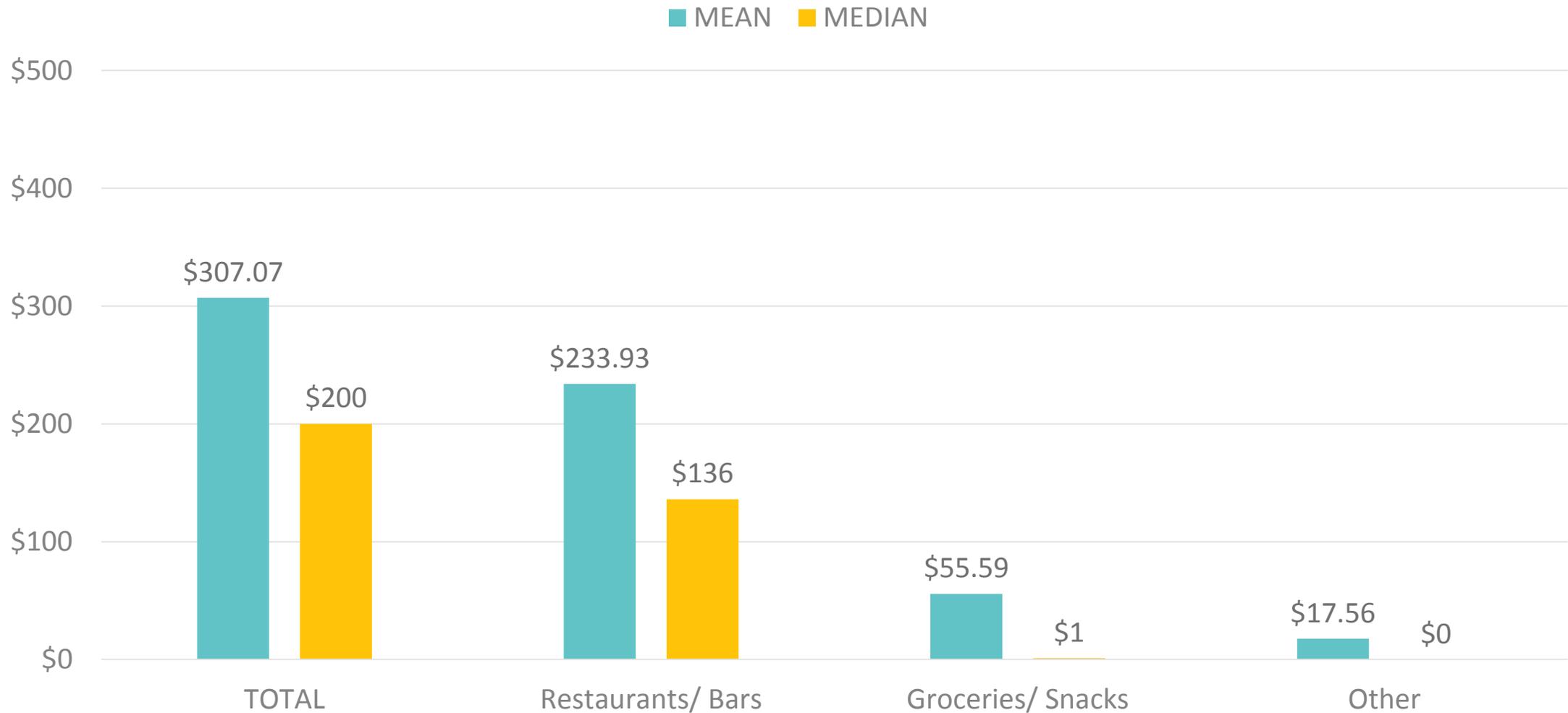
ONISLE – TOTAL FOOD & BEVERAGE TRACKING
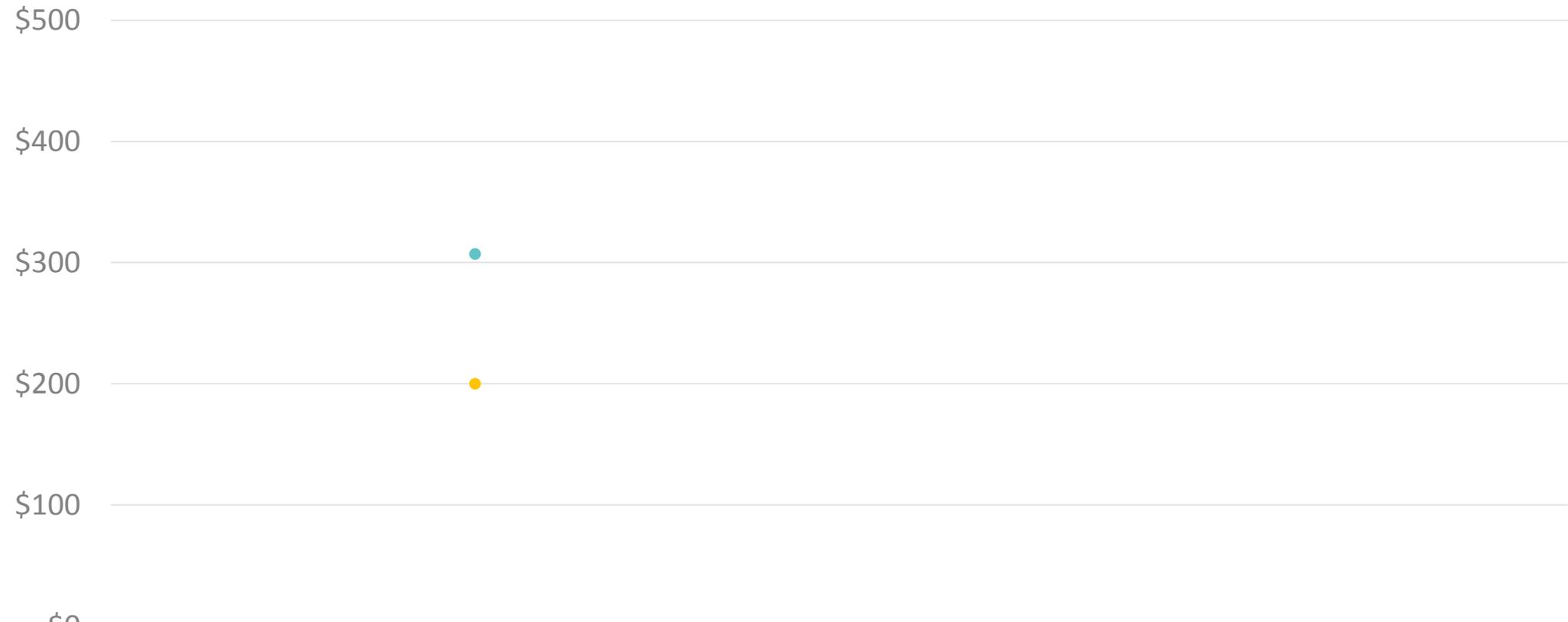
	FY2019	FY2020
MEAN	$307.07	
MEDIAN	$200.00	

Q: How much additional did you and your family spend on Guam – Food & Beverage?

ONISLE – ENTERAINMENT & RECREATION

Legend: ■ MEAN ■ MEDIAN

	MEAN	MEDIAN
TOTAL	$118.27	$0
Attractions & Entertainment	$55.52	$0
Recreation & Sports	$39.58	$0
Other Activities/ Tours	$23.17	$0

Q: How much additional did you and your family spend on Guam – Entertainment & Recreation?
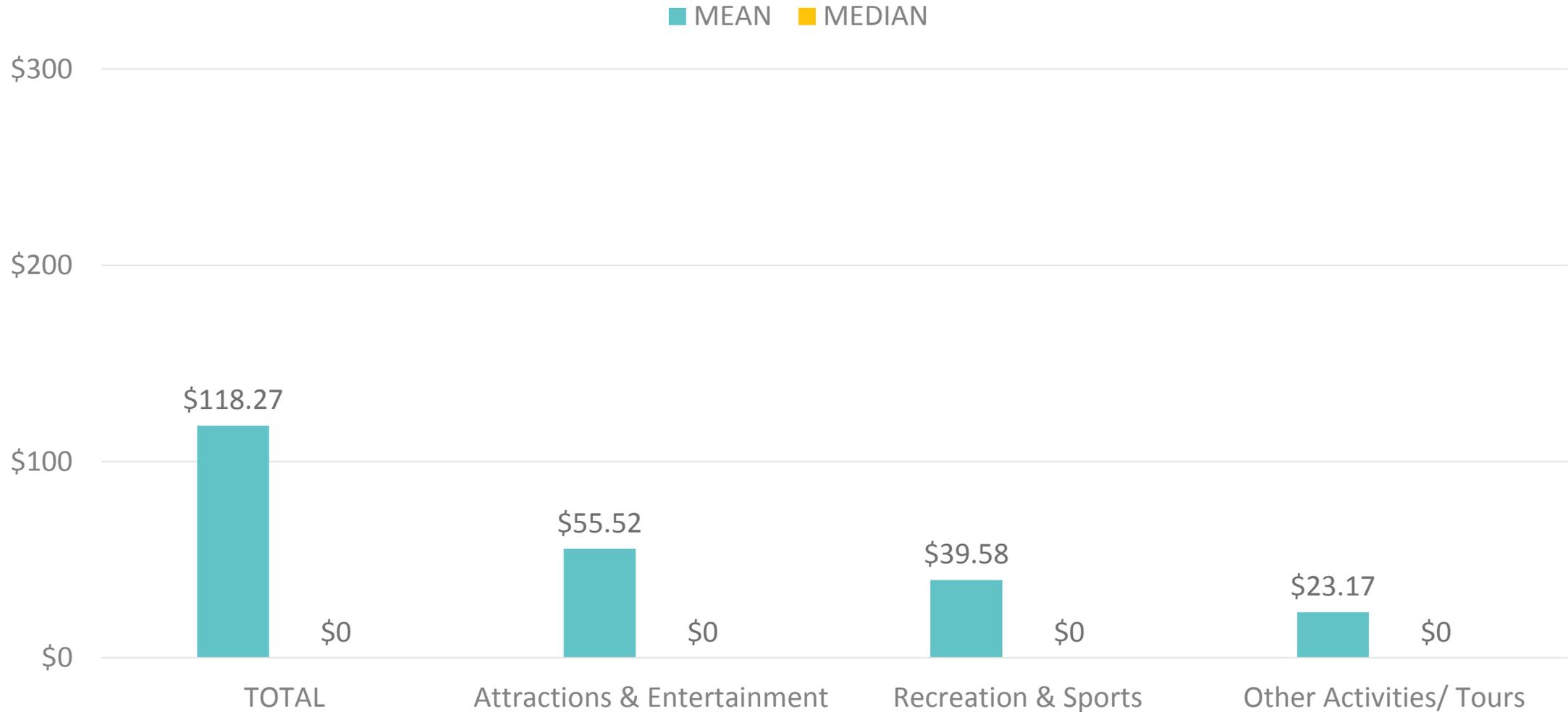
ONISLE – TOTAL ENTERTAINMENT & RECREATION TRACKING
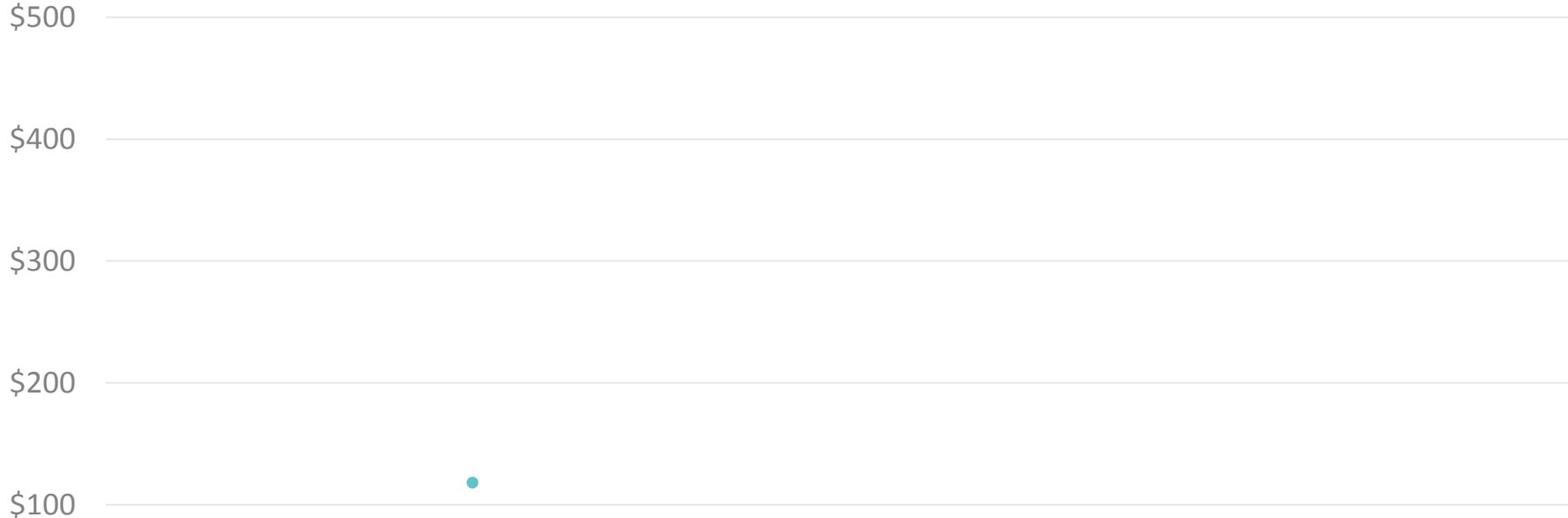
	FY2019	FY2020
●MEAN	$118.27	
●MEDIAN	$0.00	

Q: How much additional did you and your family spend on Guam – Entertainment & Recreation?

ONISLE – TRANSPORTATION

Legend: ■ MEAN ■ MEDIAN

Category	MEAN	MEDIAN
TOTAL	$44.30	$0
Bus, taxi, trolley, etc	$30.11	$0
Rental Car/ scooter/ bicycle	$13.10	$0
Other	$1.10	$0

Q: How much additional did you and your family spend on Guam – Transportation?

ONISLE – SHOPPING

Legend: ■ MEAN ■ MEDIAN

Category	MEAN	MEDIAN
TOTAL	$388.05	$150
Fashion & Clothing	$125.60	$0
Souvenirs	$86.58	$0
Accessories	$83.87	$0
Cosmetics/perfume	$33.87	$0
Jewelry/watches	$27.49	$0
Food - take home	$19.64	$0
Other	$10.99	$0

Q: How much additional did you and your family spend on Guam – Shopping?

[A] GUAM VISITORS BUREAU GUAM

ONISLE – TOTAL SHOPPING TRACKING

	FY2019	FY2020
●━ MEAN	$388.05	
●━ MEDIAN	$150.00	

Q: How much additional did you and your family spend on Guam – Shopping?
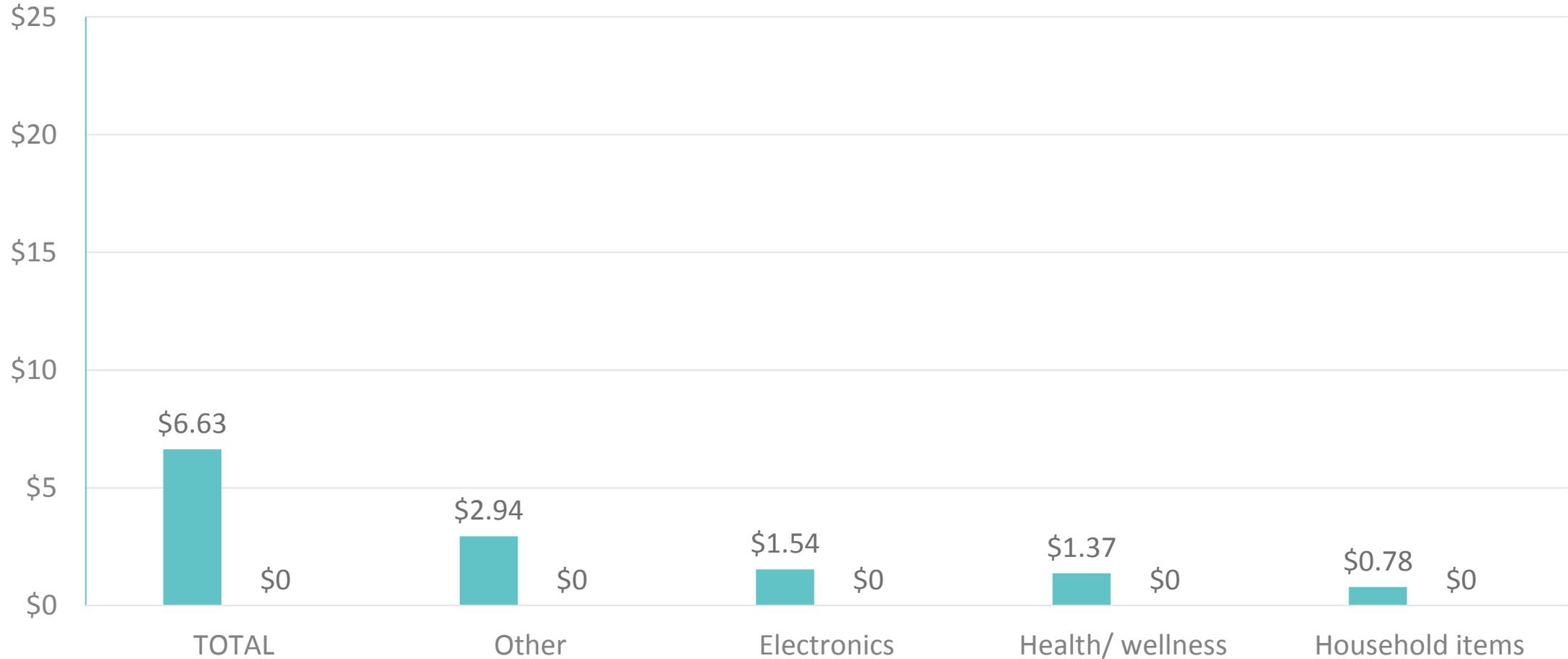
ONISLE – MISCELLANEOUS TRACKING

	FY2019	FY2020
MEAN	$6.63	
MEDIAN	$0.00	

Q: How much additional did you and your family spend on Guam – Other spending?
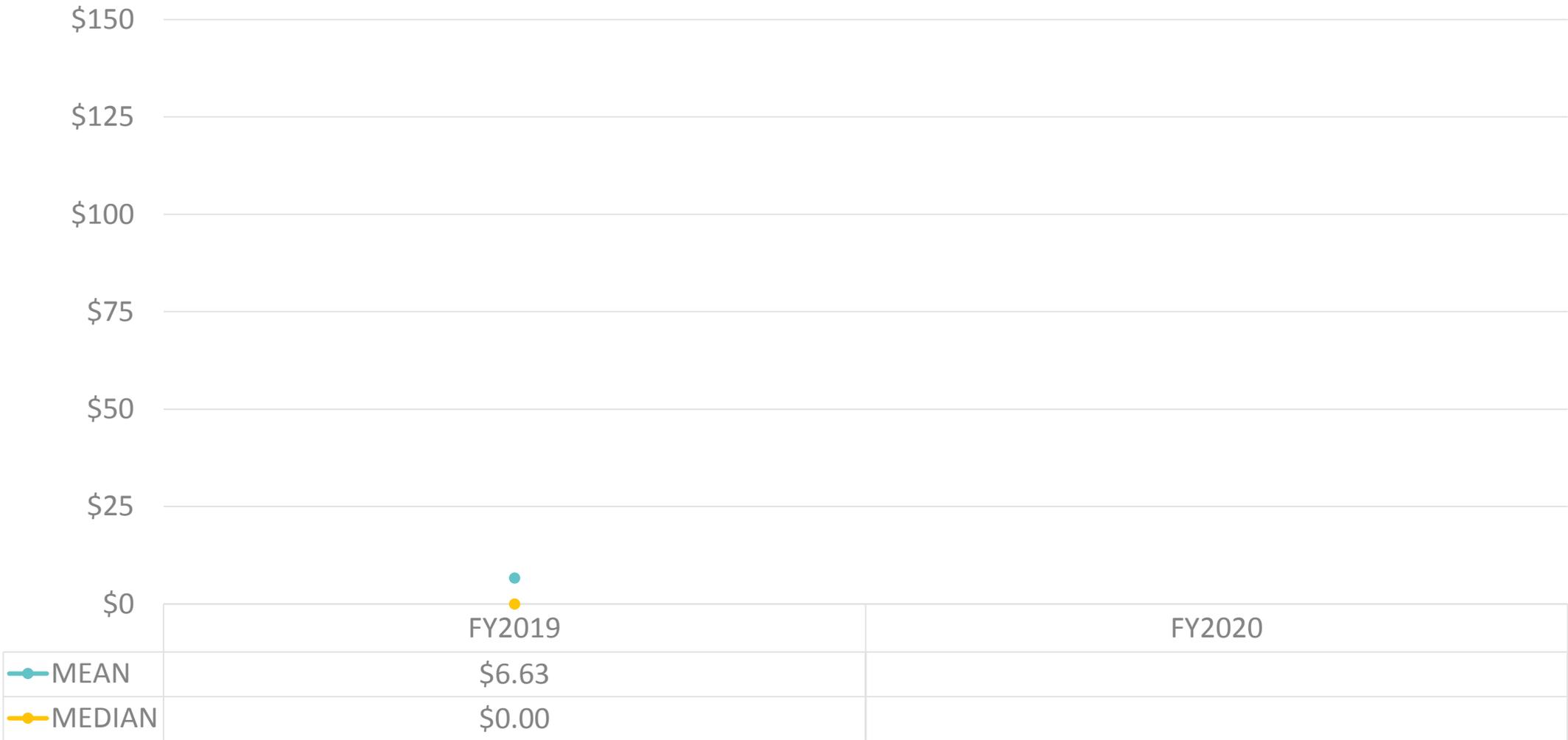
TOTAL EXPENDITURES PER PERSON (ONISLE + PREPAID)

- $1,259.37 = Mean average per person

- $1,025.00 = Median amount spent per person

# TOTAL EXPENDITURES PER PERSON TRACKING

	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
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	$1,498.91	$1,259.37
MEDIAN												$1,150.00	$1,302.00	$1,025.00

Q: *How much additional did you and your family spend on Guam – Other spending?*
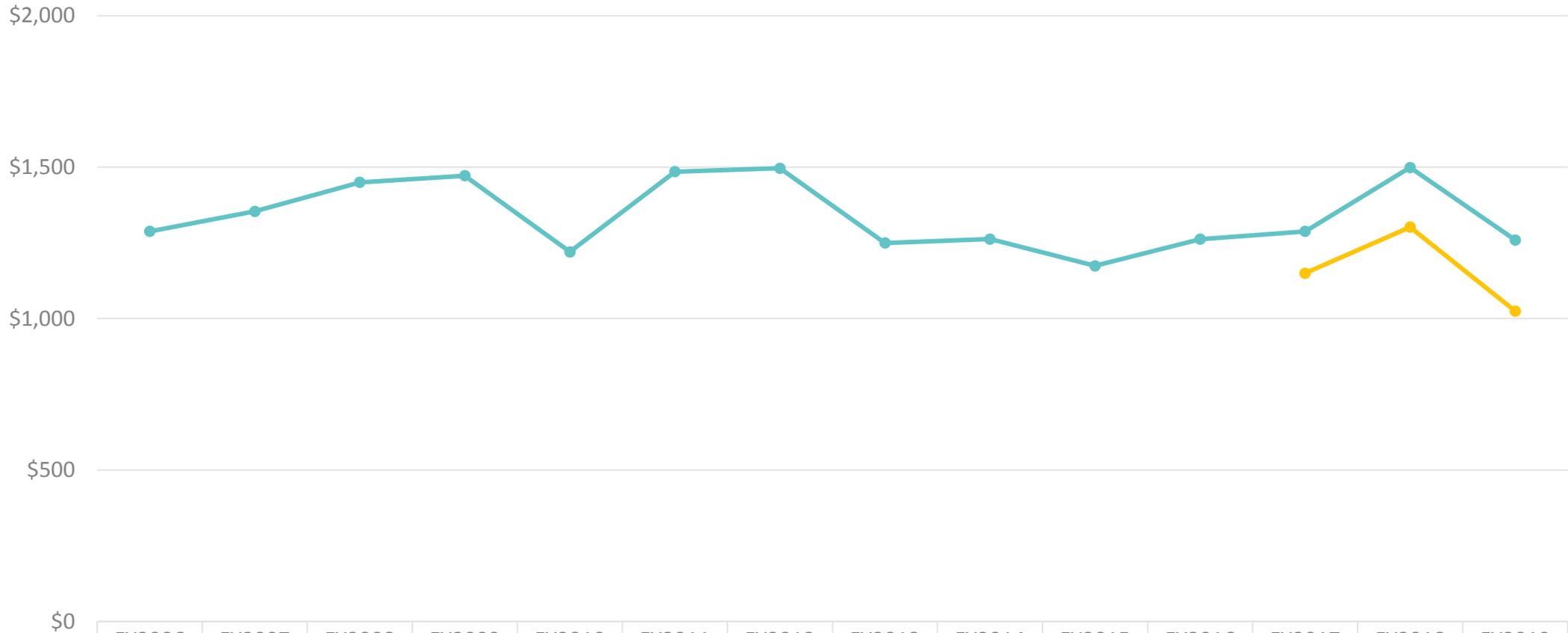
GUAM AIRPORT EXPENDITURE TRACKING
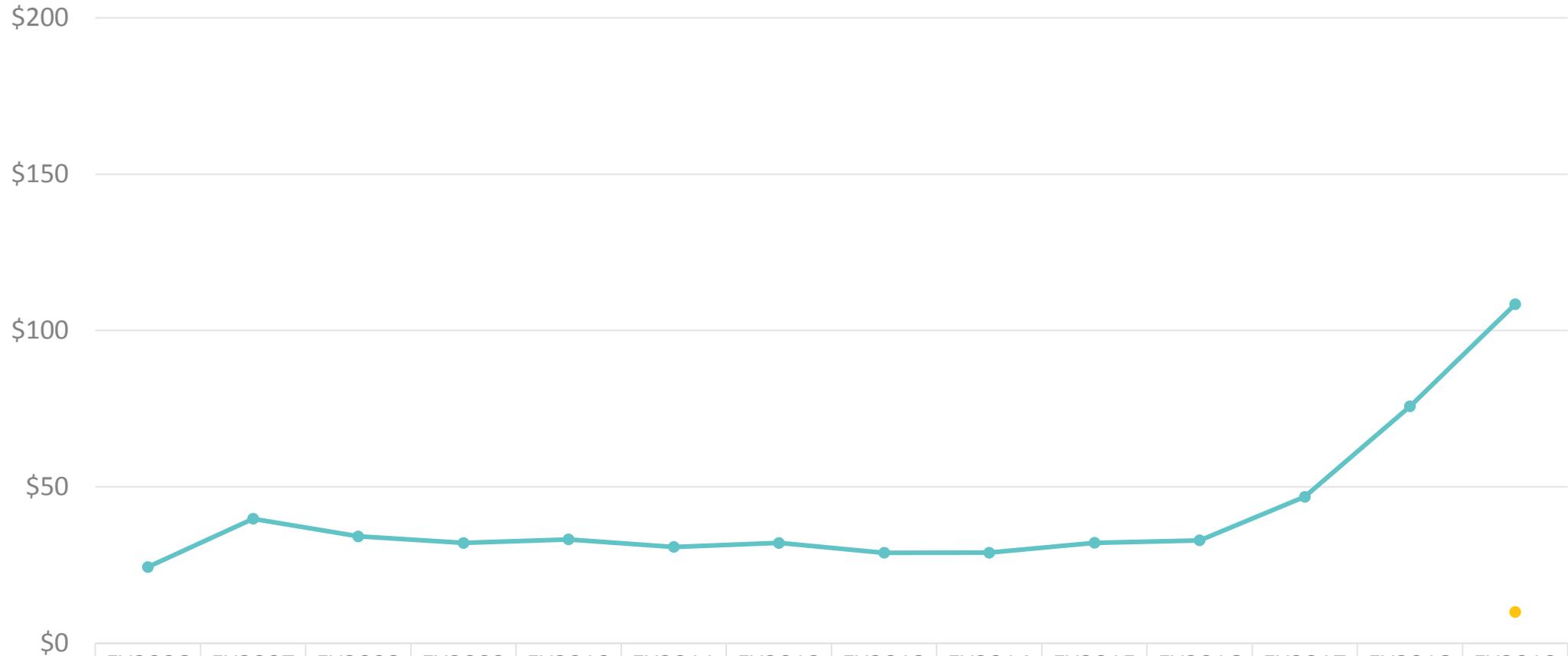
	FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
MEAN	$24.40	$39.80	$34.20	$32.10	$33.20	$30.80	$32.10	$28.95	$28.96	$32.12	$32.89	$46.85	$75.78	$108.40
MEDIAN														$10.00

Q: How much additional did you and your family spend on Guam – Other spending?

[A]   GUAM VISITORS BUREAU   GUAM

SECTION 4
VISITOR SATISFACTION

OVERALL SATISFACTION – 7PT SCALE

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

Mean (7pt Scale) values:
FY2006: 5.6, FY2007: 5.6, FY2008: 5.7, FY2009: 5.8, FY2010: 5.8, FY2011: 5.8, FY2012: 5.9, FY2013: 5.99, FY2014: 5.98, FY2015: 6.02, FY2016: 6.06, FY2017: 5.96, FY2018: 5.88, FY2019: 5.94

Very Satisfied (Top Box) FY2019: 37%

Q: Overall, how satisfied are you with your experience while on Guam?

OVERALL SATISFACTION – 10PT SCALE

8.44

50%

FY2019

FY2020

■ Very Satisfied (Top Box 9-10)　—●— MEAN (10pt Scale)

Q: Overall, how satisfied are you with your experience while on Guam?

SWOT – POSITIVE ASPECT OF TRIP

Category	Percentage
Beach/ ocean	41%
Shopping	14%
Activities- variety	13%
Natural beauty	6%
Event- fam/friend	4%
Local culture	4%
Hotel/ Accommodations	3%
Weather	3%
Cust service	3%
Sightseeing	3%
Food	2%
Event- participant	2%
Safety	2%
Relax	1%
"Hafa Adai" Spirit	1%

Q: Please tell us about one detail that made your trip to Guam excellent?
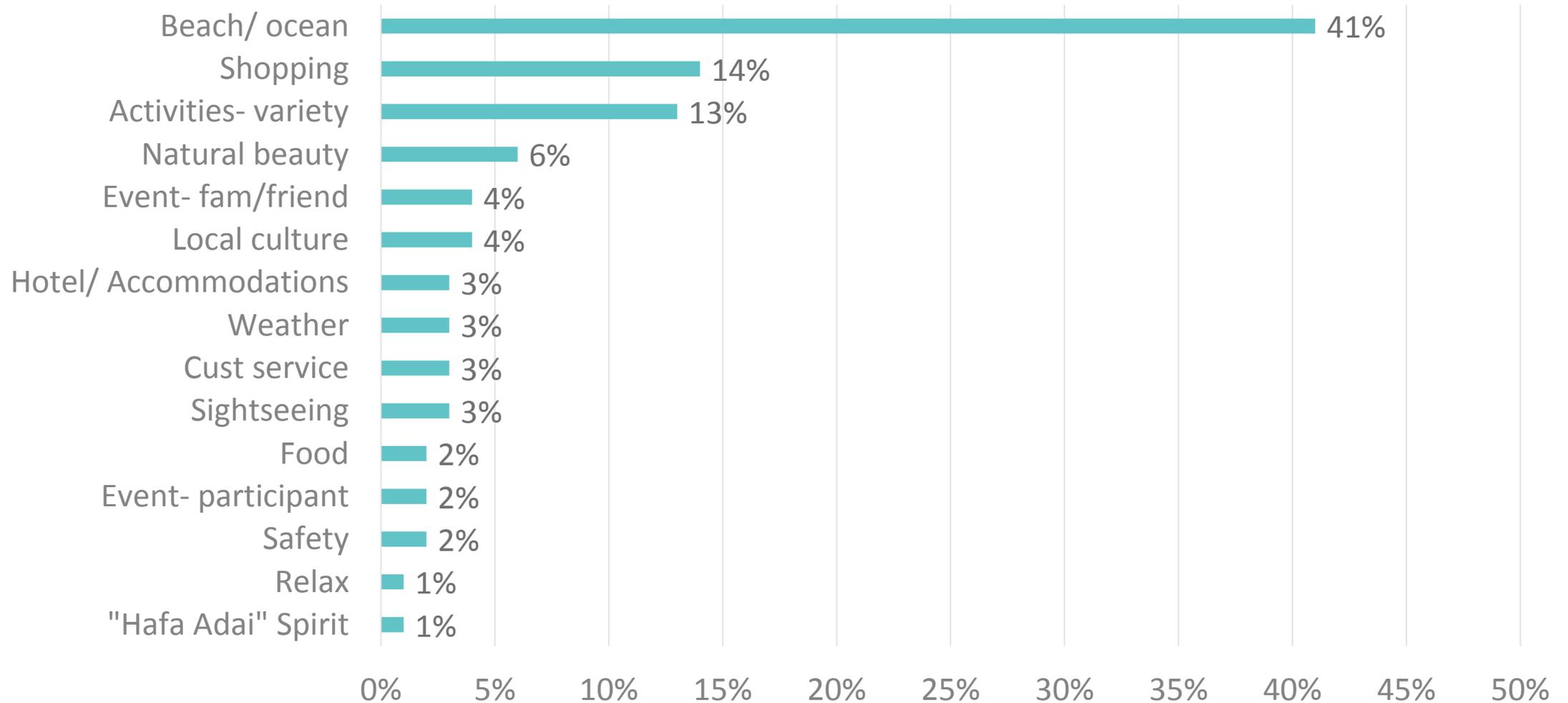
SWOT – NEGATIVE ASPECT OF TRIP

Horizontal bar chart values (top to bottom):
- Accommodations- Cleanliness: 19%
- 12%
- 12%
- Food: 10%
- 10%
- Public Bathroom: 8%
- Language: 4%
- 4%
- Driving: 3%
- 3%
- Accommodations- not as promised: 3%
- 2%
- Accommodations- cust serv: 2%
- 1%
- Activities- Variety: 1%
- 1%

Q: If applicable, which ONE thing could be improved to make your stay on Guam more enjoyable?
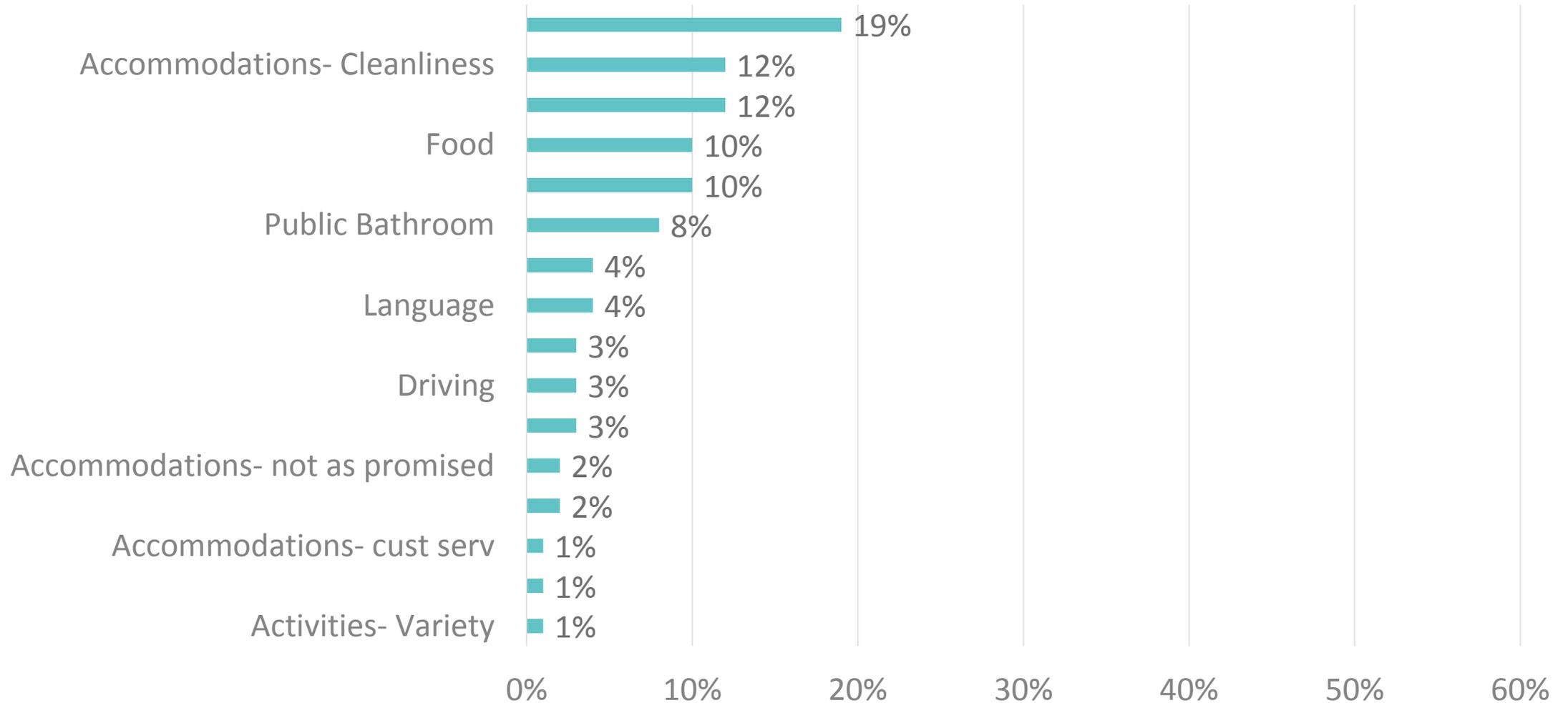
SATISFACTION – ENTERTAINMENT

8.01

46%

FY2019

FY2020

Very Satisfied (Top Box 9-10)   MEAN

Q: Please rate your satisfaction with the following aspects of your trip to Guam?

SATISFACTION – SHOPPING

- Very Satisfied (Top Box 9-10)
- MEAN

7.92

43%

FY2019

FY2020

Q: Please rate your satisfaction with the following aspects of your trip to Guam?

GUAM VISITORS BUREAU

GUAM

SATISFACTION – DINING

7.84

39%

FY2019

FY2020

■ Very Satisfied (Top Box 9-10) ● MEAN

Q: Please rate your satisfaction with the following aspects of your trip to Guam?

SATISFACTION – BEACHES

8.67

64%

FY2019

FY2020

■ Very Satisfied (Top Box 9-10) ━●━ MEAN

83 *Q: Please rate your satisfaction with the following aspects of your trip to Guam?*

SATISFACTION – PARKS

7.19

31%

FY2019   FY2020

Very Satisfied (Top Box 9-10)   MEAN

Q: Please rate your satisfaction with the following aspects of your trip to Guam?

SATISFACTION – SIGHTSEEING AREAS

Very Satisfied (Top Box 9-10)   MEAN

Q: Please rate your satisfaction with the following aspects of your trip to Guam?

SATISFACTION – SAFETY & SECURITY

8.35

53%

FY2019   FY2020

■ Very Satisfied (Top Box 9-10)   ●━ MEAN

87   *Q: Please rate your satisfaction with the following aspects of your trip to Guam?*

SATISFACTION – ACCOMMODATIONS

Excellent (Top Box 9-10) MEAN

Q: Overall, how would you rate your lodging/ hotel accommodations?

BRAND ADVOCACY

8.21

48%

FY2019

FY2020

■ Extremely likely (Top Box 9-10) ●—MEAN

Q: How likely are you to recommend Guam to your family and friends?

TRIP EXPECTATIONS

Guam met my expectations
55%

Guam exceeded my expectations
42%

Guam did not meet my expectations
3%

Q: Would you say this trip to Guam…?

TRIP EXPECTATIONS – TRACKING

	FY2019	FY2020
●— Exceeded expectations	42%	
●— Met expectations	55%	
●— Did not meet expectations	3%	

Q: Would you say this trip to Guam…?

SECTION 5

VISITOR ACTIVITIES

SHOPPING AREAS – PENETRATION

Penetration by shopping area:
- ABC Stores: 95%
- DFS: 71%
- The Plaza: 63%
- K-Mart: 62%
- JP Store: 59%
- Micronesian Mall: 57%
- Premier Outlets: 56%
- Ross: 30%
- Macys: 29%
- Tumon Sands: 29%
- Agana SC: 12%
- Acanta Mall: 7%
- Pacific Place: 5%

Q: Guam has a number of shopping malls and stores. Please check all those visited during this trip
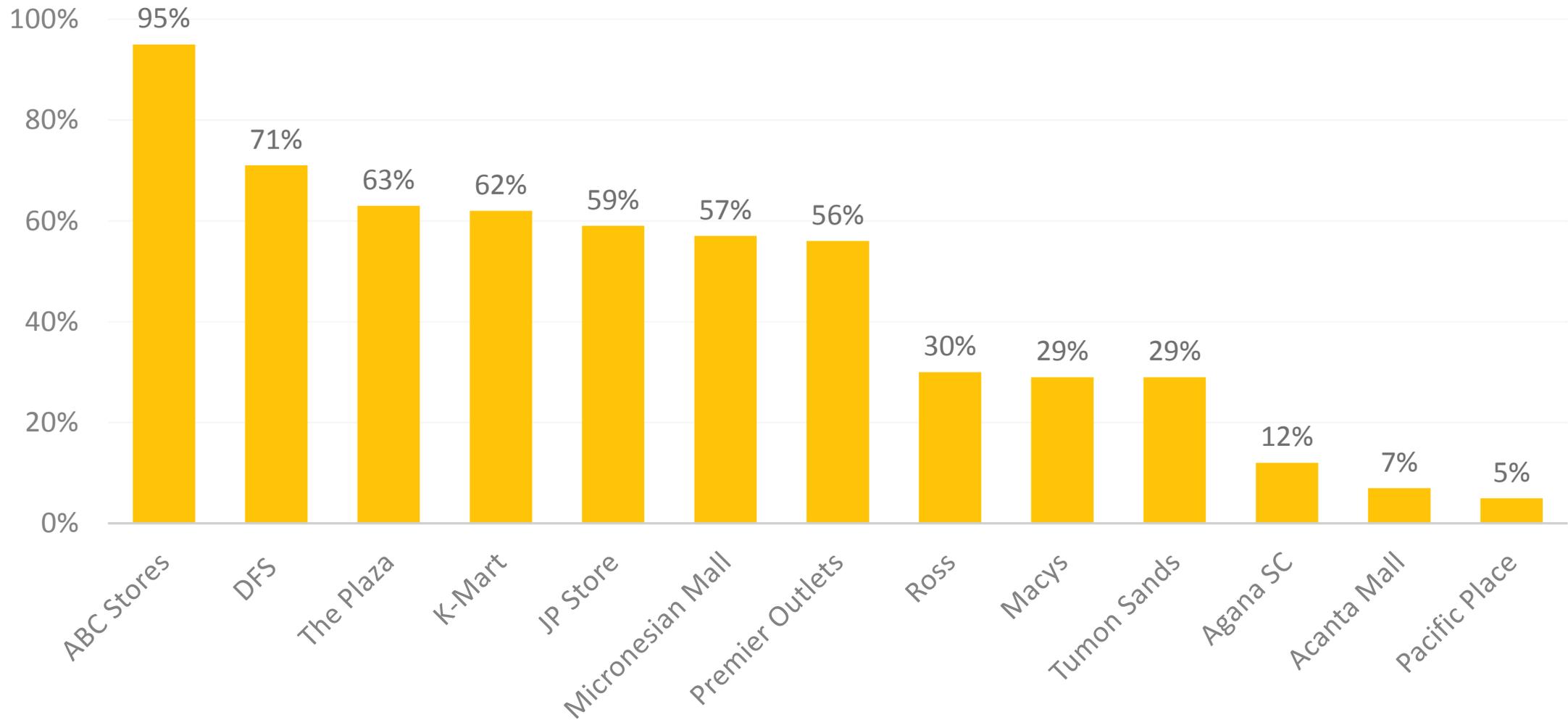
SHOPPING AREAS – TOP 3

| FY2006	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012
95% DFS 94% ABC Stores 66% Micronesian Mall	95% ABC Stores 95% DFS 70% Micronesian Mall	96% ABC Stores 94% DFS 72% Micronesian Mall	95% ABC Stores 92% DFS 71% Micronesian Mall	94% ABC Stores 89% DFS 65% Micronesian Mall	95% ABC Stores 91% DFS 64% Micronesian Mall 64% K-Mart	95% ABC Stores 90% DFS 71% JP Super

| FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019
95% ABC Stores 87% DFS 67% The Plaza/ JP Super	95% ABC Stores 85% DFS 69% The Plaza	96% ABC Stores 79% DFS 70% K-Mart	96% ABC Stores 74% DFS 69% K-Mart	96% ABC Stores 74% DFS 65% K-Mart	95% ABC Stores 72% DFS 72% K-Mart	95% ABC Stores 71% DFS 63% The Plaza

Q: Guam has a number of shopping malls and stores. Please check all those visited during this trip

ACTIVITIES – SIGHTSEEING

Bar chart:
- Boat tours/ dolphin watch: 16%
- Scenic views/ natural landmarks: 10%
- Island sightseeing tour: 9%
- Self-guided/ drove around: 7%

Q: During this trip to Guam, which of the following activities did you participate in?

ACTIVITIES – RECREATION

Bar chart:
- Beach/sunbathing: 66%
- Shopping: 56%
- Swimming in ocean: 41%
- Water park: 20%
- Spa: 8%
- Hiking: 3%
- Boat cruise: 2%
- Off-roading: 1%

Q: During this trip to Guam, which of the following activities did you participate in?

ACTIVITIES – SPORTS

Bar chart:
- Snorkeling: 27%
- Parasailing: 17%
- Jet ski: 10%
- Kayaking/ canoe: 10%
- Scuba diving: 7%
- Gun shooting: 6%
- Golfing: 3%
- Skydiving: 2%
- Paddle board/ surfing: 2%
- Fishing charter: 1%
- Windsurf/ Kitesurf: 1%
- Sporting event/ ...: 1%

Q: During this trip to Guam, which of the following activities did you participate in?

ACTIVITIES – HISTORY, CULTURE, ARTS

Q: During this trip to Guam, which of the following activities did you participate in?
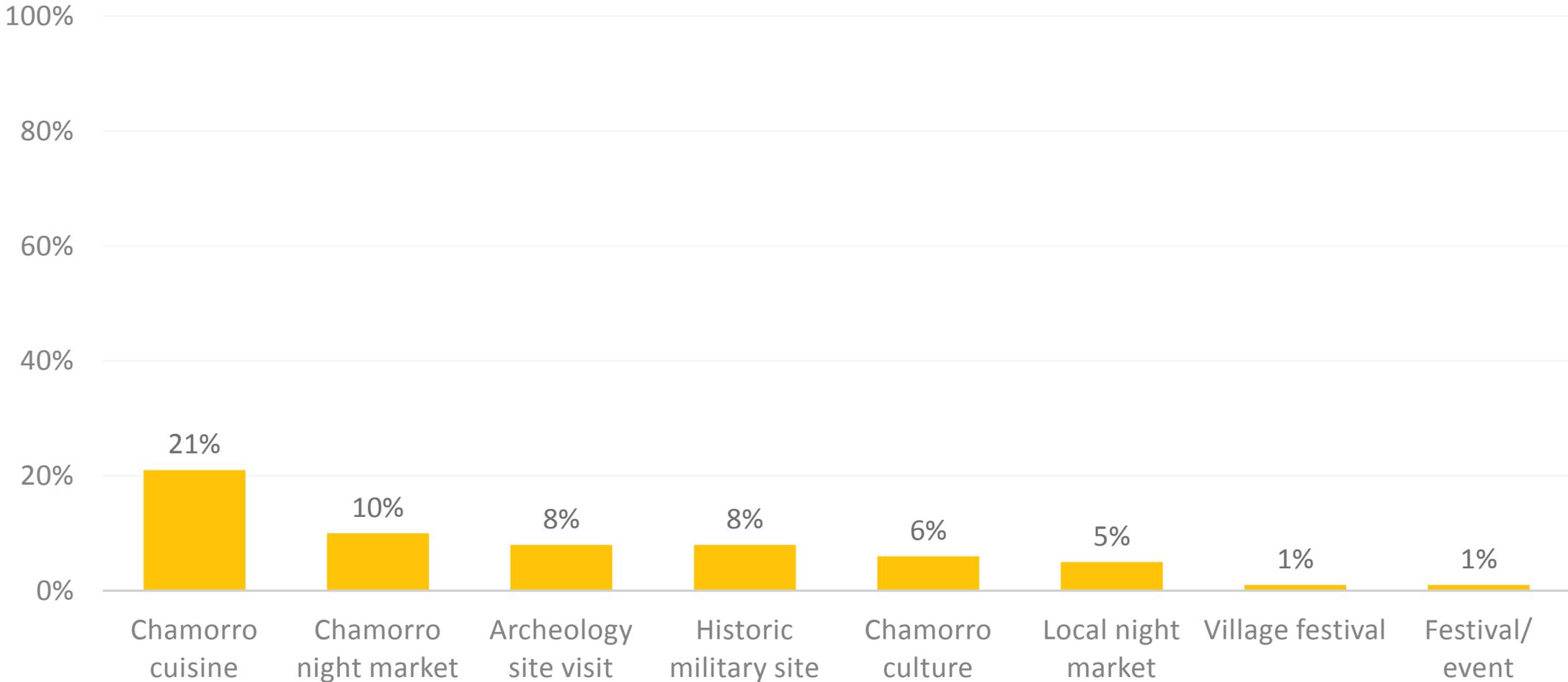
ACTIVITIES – ENTERTAINMENT & DINING

Q: During this trip to Guam, which of the following activities did you participate in?
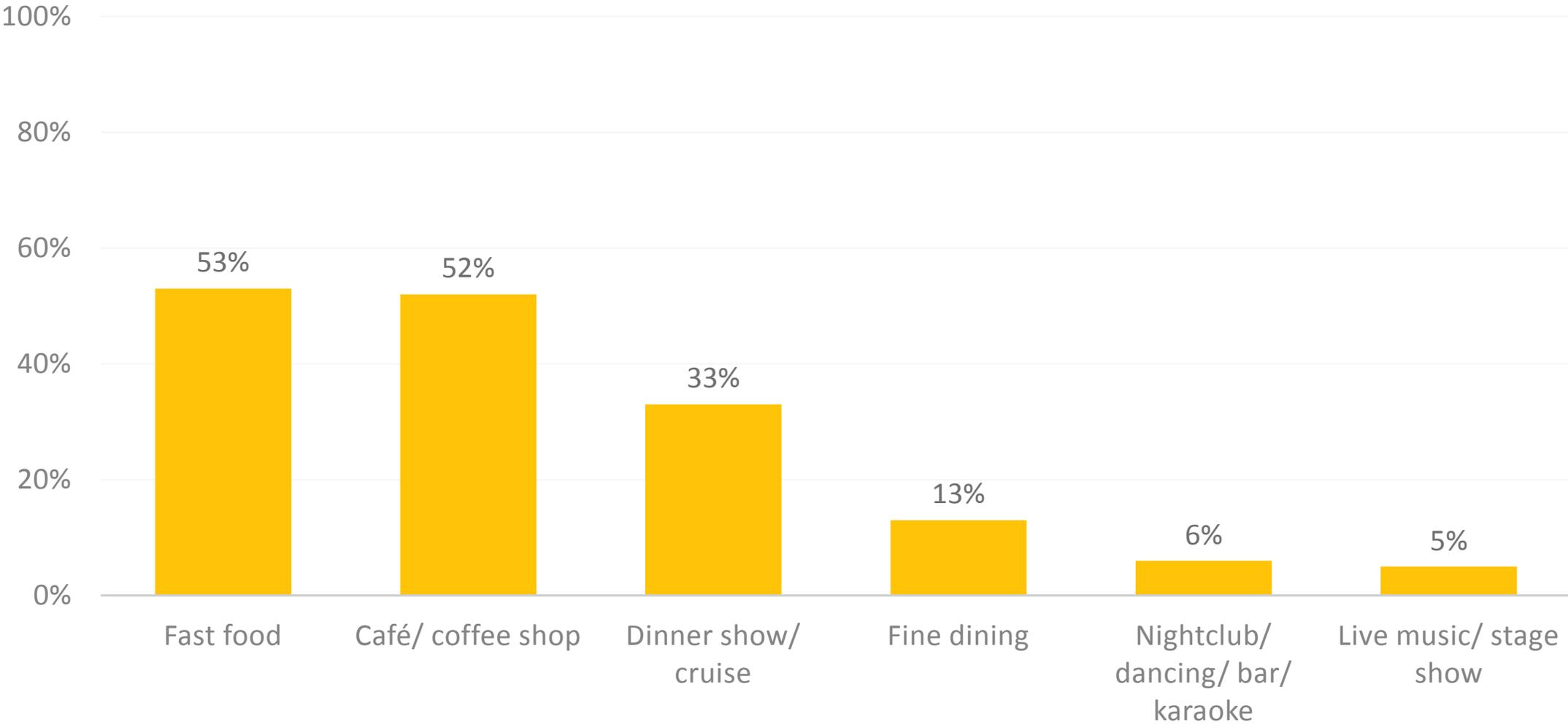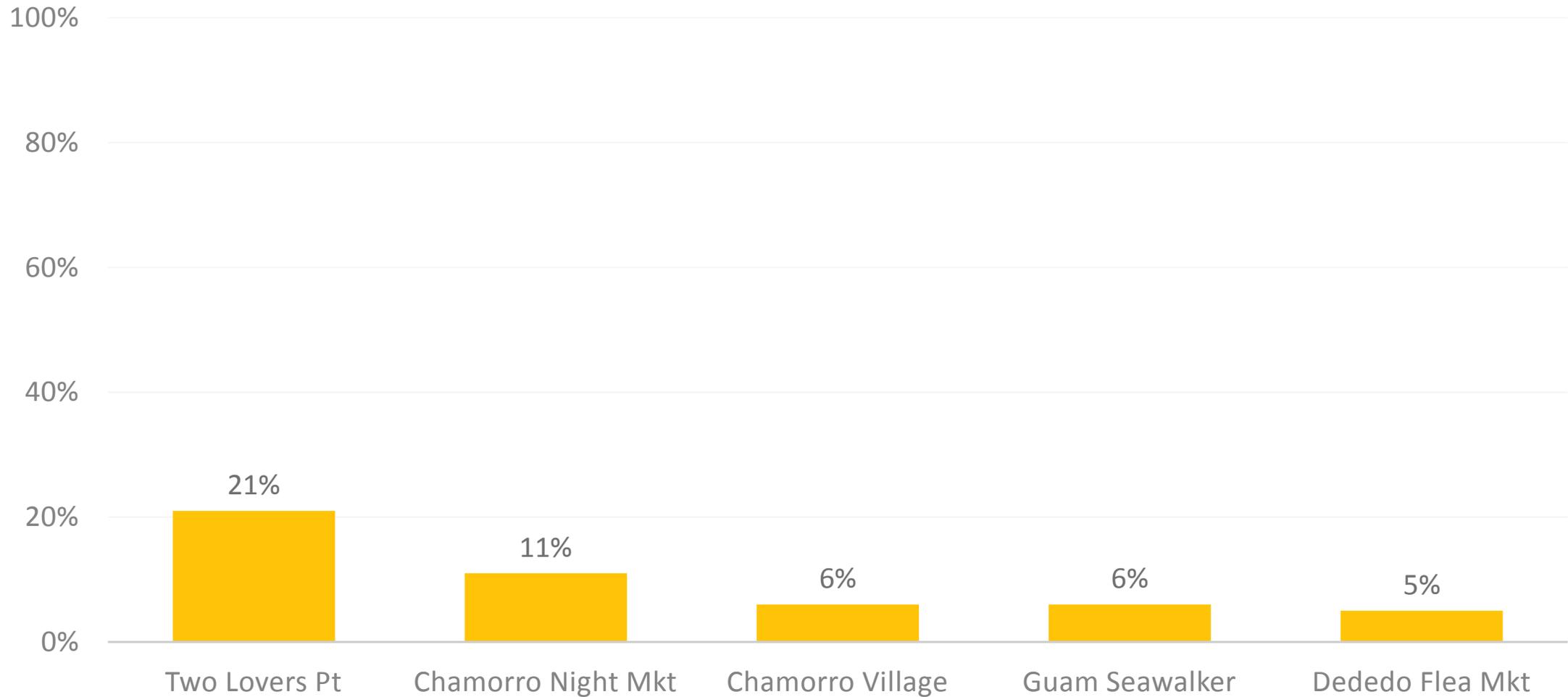
LOCAL CULTURE – OBSTACLES

	FY2019	FY2020
Schedule	63%	
Unaware	22%	
Did not want to	16%	
Did not know where	5%	

Q: Why did you not participate in any cultural activities or events during your recent stay on Guam?
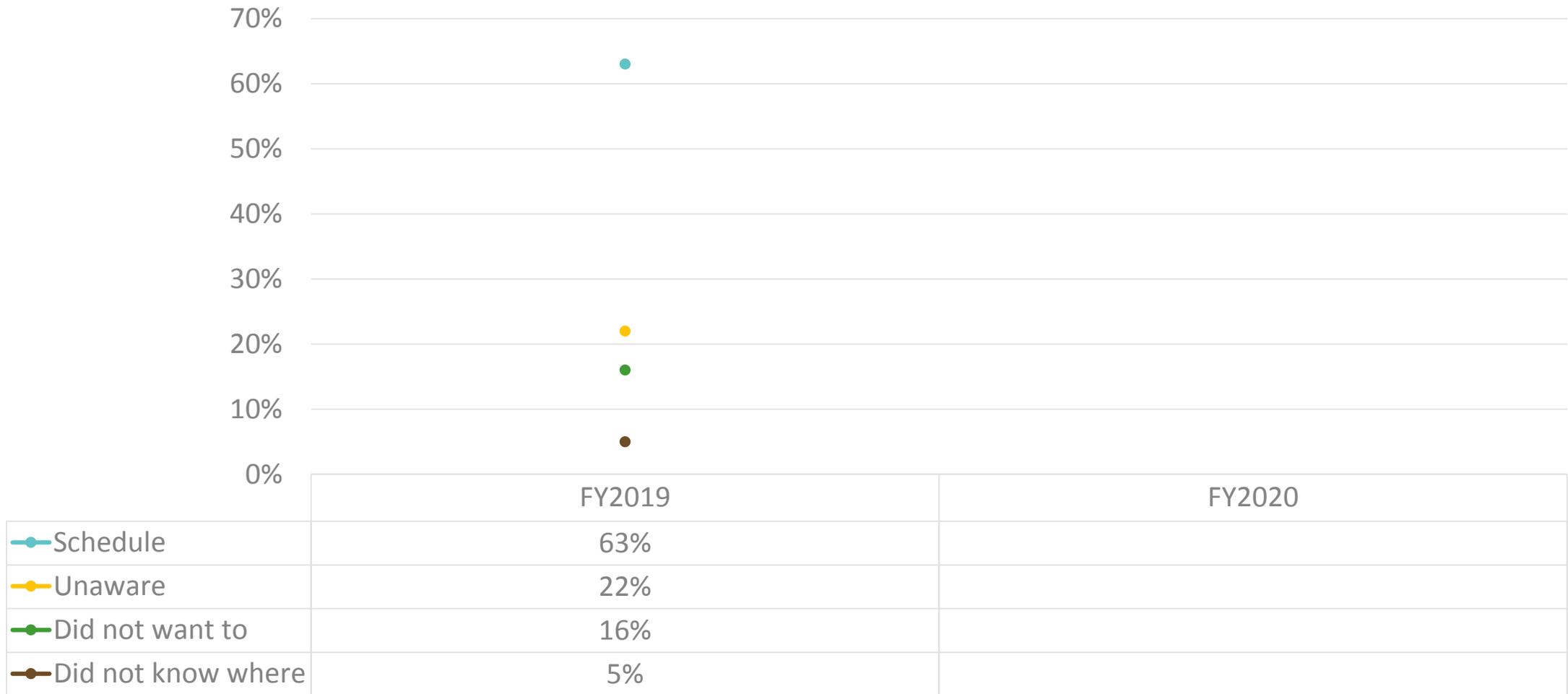
SECTION 6
SOURCES OF INFORMATION

PRE-ARRIVAL SOURCES OF INFORMATION

Q: Please select the top three sources of information you used to find out about Guam before your trip.

GVB VISITOR SATISFACTION STUDY

Q5 Please select the top three sources of information you used to find out about Guam before your trip

		TOTAL	FAMILY	OFFICE LADY	GROUP TOUR	MICE	SILVER	WEDDING	REPEAT
		-	-	-	-	-	-	-	-
Q5	Internet/Mobile App	91%	91%	89%	87%	83%	68%	90%	87%
	Travel guide book at bookstores	48%	50%	48%	43%	53%	52%	42%	39%
	Friend or relative	34%	26%	32%	35%	47%	25%	42%	25%
	Travel agent brochure	30%	33%	28%	34%	22%	43%	38%	22%
	I have been to Guam before	24%	30%	26%	22%	22%	37%	16%	56%
	Magazine (consumer)	22%	23%	21%	22%	19%	17%	21%	19%
	Social media	14%	11%	14%	11%	11%	4%	15%	12%
	TV	7%	6%	6%	8%	3%	5%	6%	7%
	Co-worker/ company travel department	3%	2%	3%	6%	11%	4%	3%	2%
	Consumer travel shows	2%	2%	2%	2%	3%		1%	1%
	Guam Visitors Bureau office	1%	2%	2%	1%	3%	1%	2%	2%
	Guam Visitors Bureau promotional activities	1%	2%	1%	2%		4%	1%	2%
	Newspaper	0%	0%	0%	0%				0%
	Travel trade shows	0%	0%	0%	1%		1%		0%
	Radio	0%	0%	0%	0%				0%
	Theater ads	0%	0%						
	Total	4426	2019	900	847	36	81	204	1872

Prepared by Anthology Research

Q: Please select the top three sources of information you used to find out about Guam before your trip.

ONISLE SOURCES OF INFORMATION

Source	Percentage
Internet	76%
Guidebook	53%
Hotel staff	43%
Tour staff	23%
Social Media	21%
Local people	11%
Local pubs	9%
Taxi Drivers	9%
Signage	8%
Restaurant	5%
Other Vis	5%
GVB	5%
Vis Channel	5%
Retail	5%

Q: Please select the top three sources of information you used to find out about Guam while you were here.
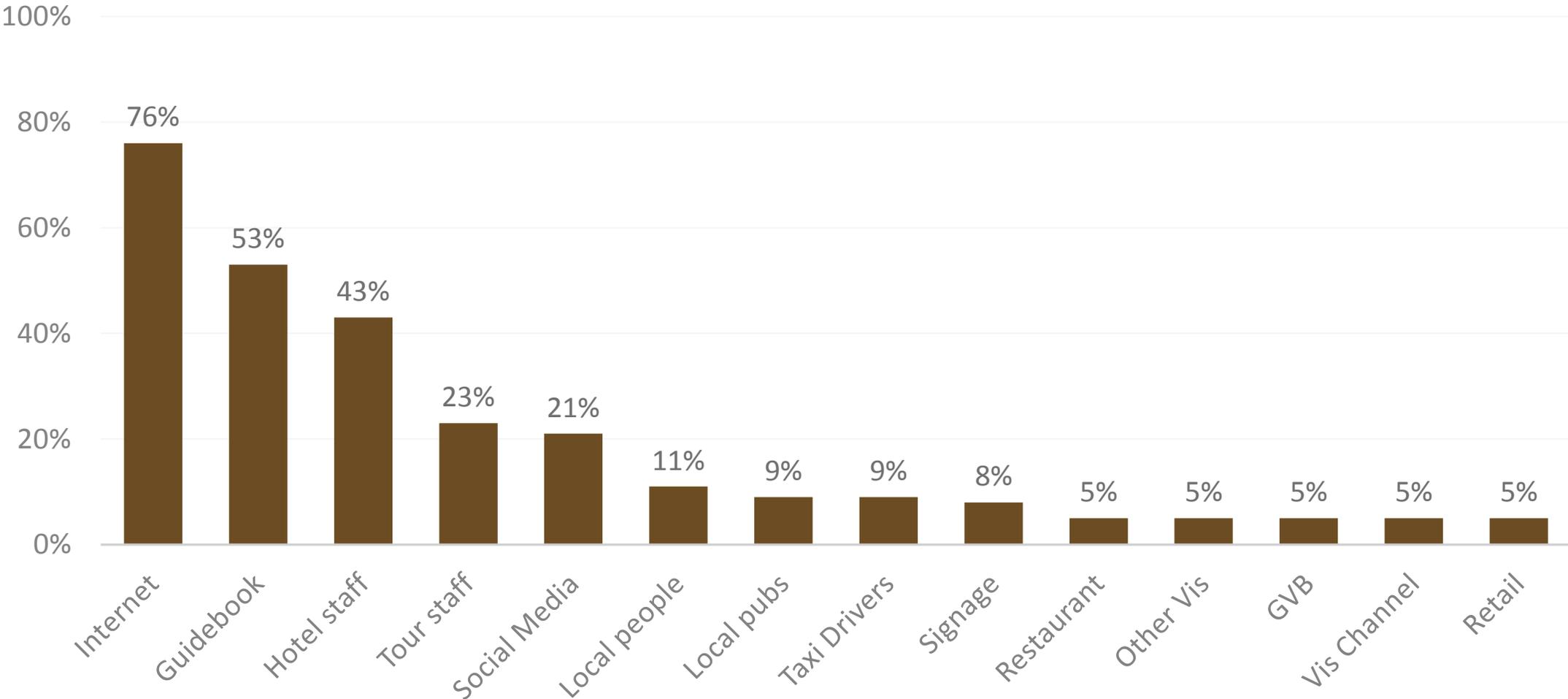
GVB VISITOR SATISFACTION STUDY

Q6 Please select the top three sources of information you used to find out about Guam while you were here

		TOTAL	FAMILY	OFFICE LADY	GROUP TOUR	MICE	SILVER	WEDDING	REPEAT
		-	-	-	-	-	-	-	-
Q6	Internet/ Mobile App	76%	78%	77%	71%	64%	56%	77%	75%
	Guide books I brought with me	53%	57%	56%	47%	36%	54%	46%	48%
	Hotel staff	43%	43%	40%	45%	50%	46%	47%	43%
	Tour staff	23%	26%	22%	27%	31%	35%	25%	22%
	Social Media	21%	16%	19%	17%	14%	2%	21%	20%
	Local people	11%	7%	10%	13%	22%	6%	13%	11%
	Local publication	9%	11%	10%	11%	11%	16%	7%	12%
	Taxi drivers	9%	7%	7%	9%	14%	16%	15%	8%
	Signs/ advertisement	8%	9%	8%	9%	8%	10%	6%	9%
	Restaurant staff (outside hotel)	5%	5%	5%	6%		10%	8%	4%
	Retail staff	5%	5%	4%	5%	14%	6%	4%	5%
	Other visitors	5%	3%	4%	5%	11%	7%	4%	4%
	Guam Visitors Bureau	2%	3%	2%	2%	3%	4%	1%	3%
	Visitors channel	2%	2%	2%	2%	3%	5%	1%	2%
	Total	4423	2017	899	846	36	81	204	1870

Prepared by Anthology Research

Q: Please select the top three sources of information you used to find out about Guam while you were here.

ONLINE SOURCES OF INFORMATION

Bar chart:
- Google: 70%
- Instagram: 45%
- Yahoo: 37%
- Youtube: 17%
- Online booking travel site: 13%
- Twitter: 8%
- GVB: 6%
- Facebook: 3%

Q: Which internet or social media sources, if any, did you use to learn about Guam?

ONLINE SOURCES OF INFORMATION

	FY2019	FY2020
Google	70%	
Instagram	45%	
Facebook	3%	
Twitter	8%	
Online booking site	13%	
YouTube	17%	
GVB	6%	
Yahoo	37%	

Q: Which internet or social media sources, if any, did you use to learn about Guam?

SECTION 7
IMMIGRATION

IMPACT OF AIRPORT IMMIGRATION SVC ON FUTURE TRAVEL TO GUAM

Yes
31%

No
69%

Q: Do you think the security screening and/or immigration process here at the Guam International Airport will affect your decisions to visit Guam again in the future?

IMPACT OF AIRPORT IMMIGRATION SVC ON FUTURE TRAVEL TO GUAM

Chart showing "Immigration Will Impact Future Travel To Guam":
- FY2018: 27%
- FY2019: 31%
- FY2020: (no data)

Immigration Will Impact Future Travel To Guam

Q: Do you think the security screening and/or immigration process here at the Guam International Airport will affect your decisions to visit Guam again in the future?

AIRPORT – SECURITY/ IMMIGRATION ISSUES
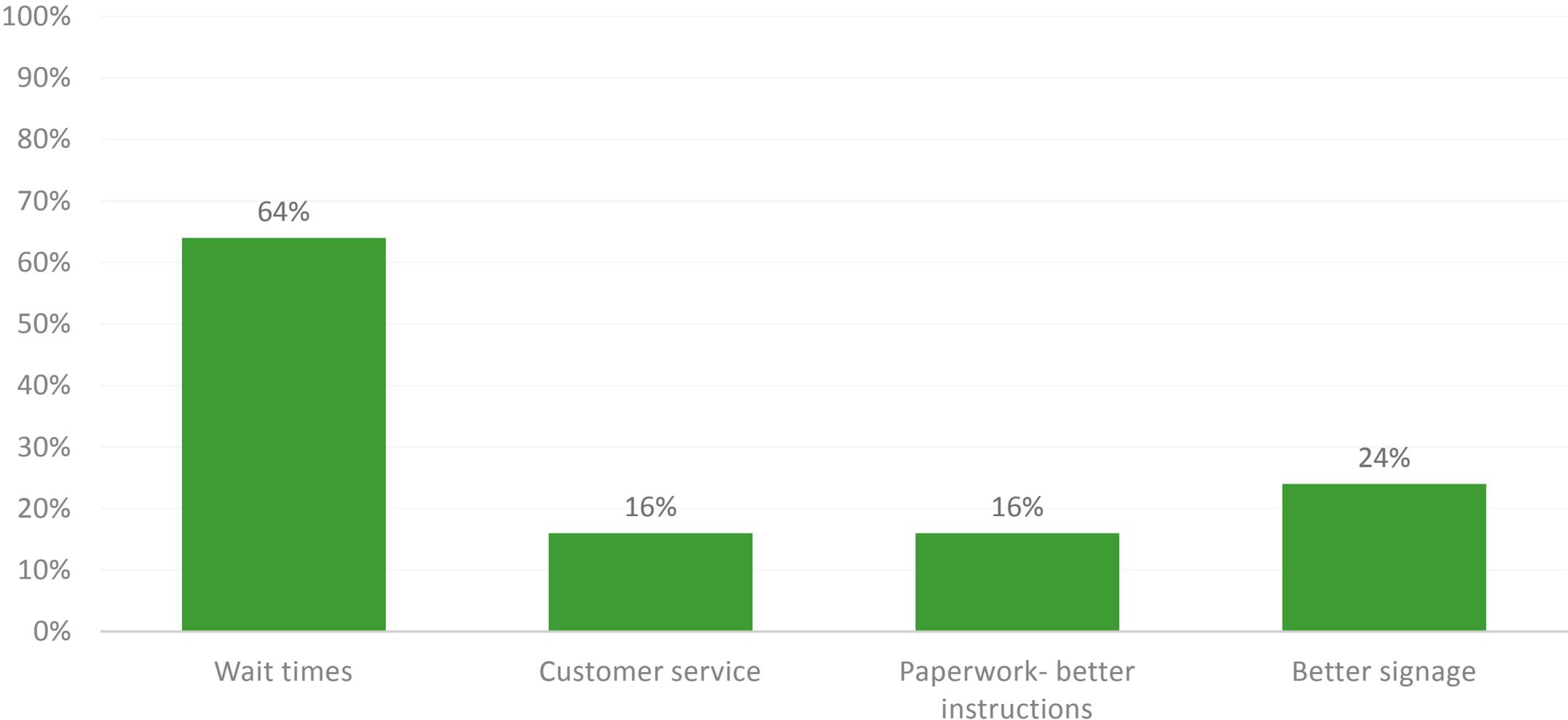
Q: What about the security screening and/ or immigration process here at the Guam International Airport could be improved?

SECTION 8
ADVANCED STATS

- 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.

- The predictor variables (drivers) are ranked on the percentage they account for the dependent variable. The top two ranked independent variables generally account for the largest percentages of the dependent variable and are thus the best predictors (drivers) of the dependent variable.

DRIVERS – OVERALL SATISFACTION

Comparison of Drivers of Overall Satisfaction, Recap 2019	
	2019
Drivers:	rank
Entertainment	1
Shopping	3
Dining	5
Beaches	2
Parks	7
Roads	
Sightseeing Areas	4
Being a safe and secure destination	6
% of Overall Satisfaction Accounted For	52.3%
NOTE: Only significant drivers are included.	

DRIVERS – OVERALL SATISFACTION

- **Overall satisfaction** with the Japan visitor's experience on Guam is driven by seven significant factors in the 2019 Period. By rank order they are:
    - **Entertainment,**
    - **Beaches,**
    - **Shopping,**
    - **Sightseeing areas,**
    - **Dining,**
    - **Being a safe & secure destination, and**
    - **Parks.**
- With these factors the overall r^2 is .523 meaning that **52.3% of overall satisfaction is accounted for by these factors.**

DRIVERS – ONISLE EXPENDITURES

Comparison of Drivers of Per Person On Island Expenditures, Recap 2019	
	2019
Drivers:	rank
Entertainment	
Shopping	
Dining	
Beaches	
Parks	
Roads	
Sightseeing Areas	
Being a safe and secure destination	
% of Overall Satisfaction Accounted For	0.0%
NOTE: Only significant drivers are included.	

DRIVERS – ONISLE EXPENDITURES

- **Per Person On Island Expenditure** of Japan visitors on Guam is driven by no significant factor in the 2019 Period.