



Guam Visitors Bureau

Japan In-Market Insight Report

JUNE 2021

[ANTHOLOGY®]
RESEARCH



Background & Objectives

- In light of the covid-19 pandemic and its abrupt and severe impacts on visitor arrivals on Guam, Guam Visitors Bureau contracted Anthology Research to gather feedback from residents likely to travel in the near future from key source markets, in order to achieve the following objectives.
 - Inform strategies to drive demand for Guam as a destination for leisure travel from the source market covered by the study: Japan.
 - Better understand motivations to travel internationally.
 - Gauge perceptions of and satisfaction with Guam as a destination.
- Anthology and Guam Visitors Bureau research staff collaboratively developed the questionnaire, which was translated into Japanese.

Methodology

- Anthology Research conducted a self-administered online survey of residents of Japan, utilizing sample provided by a reputable online sample provider. All surveys were presented in Japanese, with the option to view the survey in English. Participants were screened to include only those residents who have traveled internationally for vacation in the last two years or intend to travel internationally for vacation in the next two years.
- This report includes results from the survey, conducted June 16-18, 2021. A total of 306 surveys were collected during this period.
- The margin of error for a sample of 306 is +/- 5.60 percentage points with a 95% confidence level. That is, if all Japanese residents in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.60 percentage points.



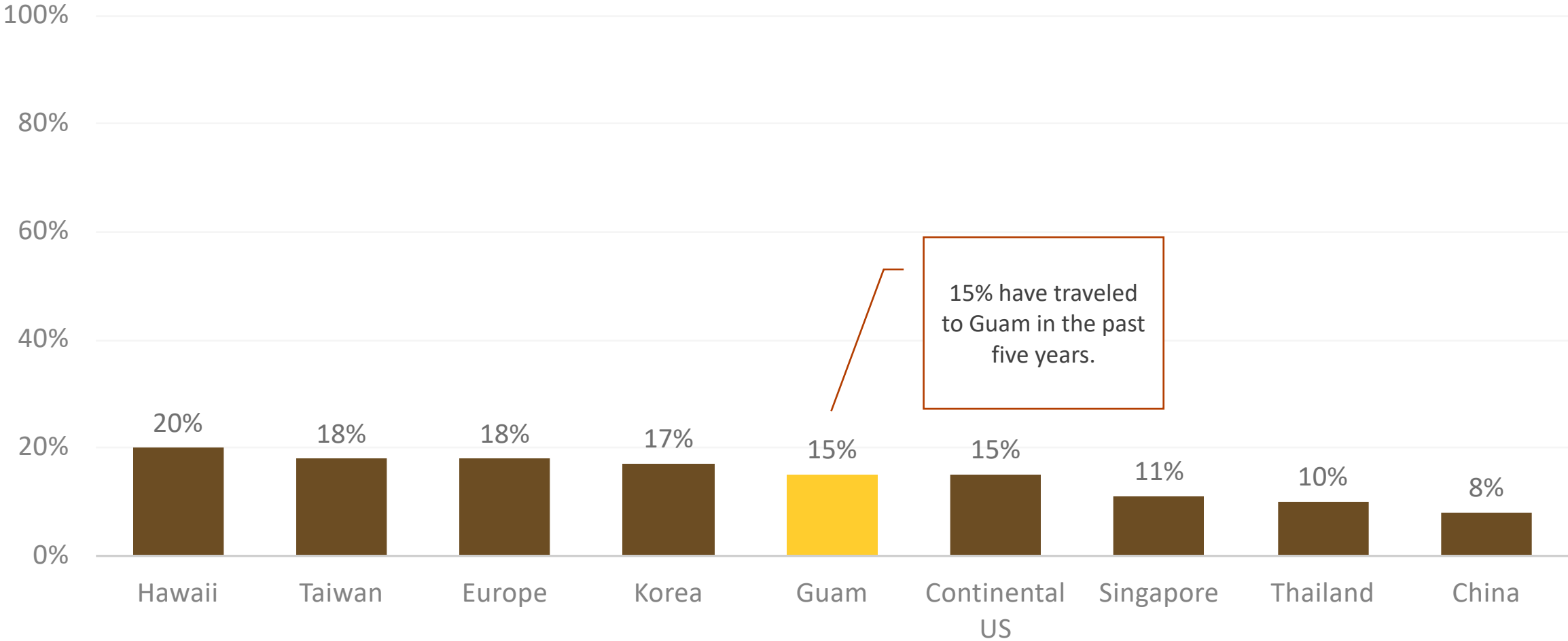


SECTION 1

TRAVEL PLANNING



TRAVEL HISTORY



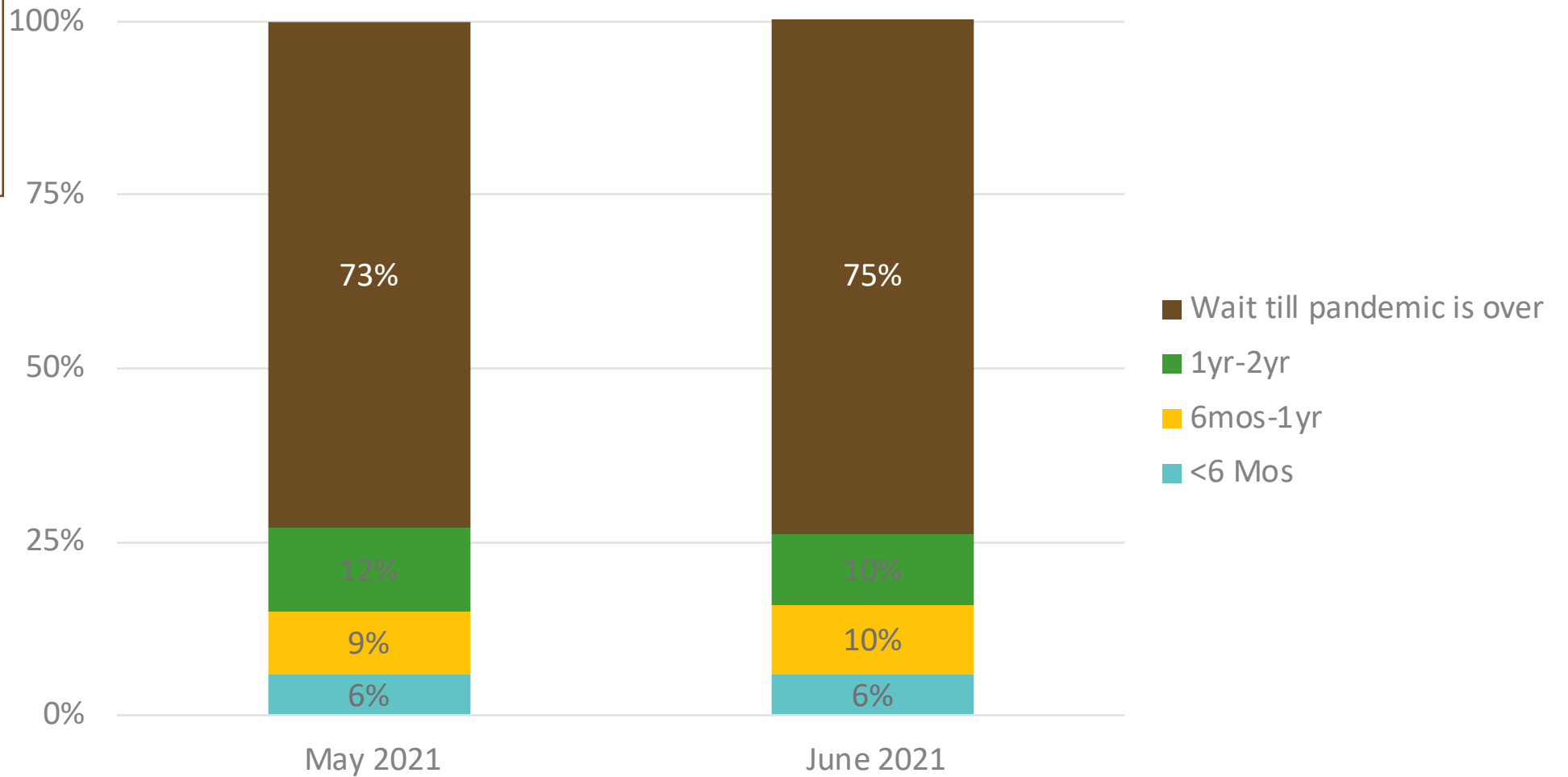
TRAVEL HISTORY

	May 2021	June 2021
Hawaii	21%	20%
Korea	22%	17%
Taiwan	20%	18%
Europe	19%	18%
Not traveling	15%	19%
Guam	18%	15%
Continental U.S.	15%	15%
Singapore	13%	11%
Thailand	12%	10%
Other	10%	10%
China	10%	8%

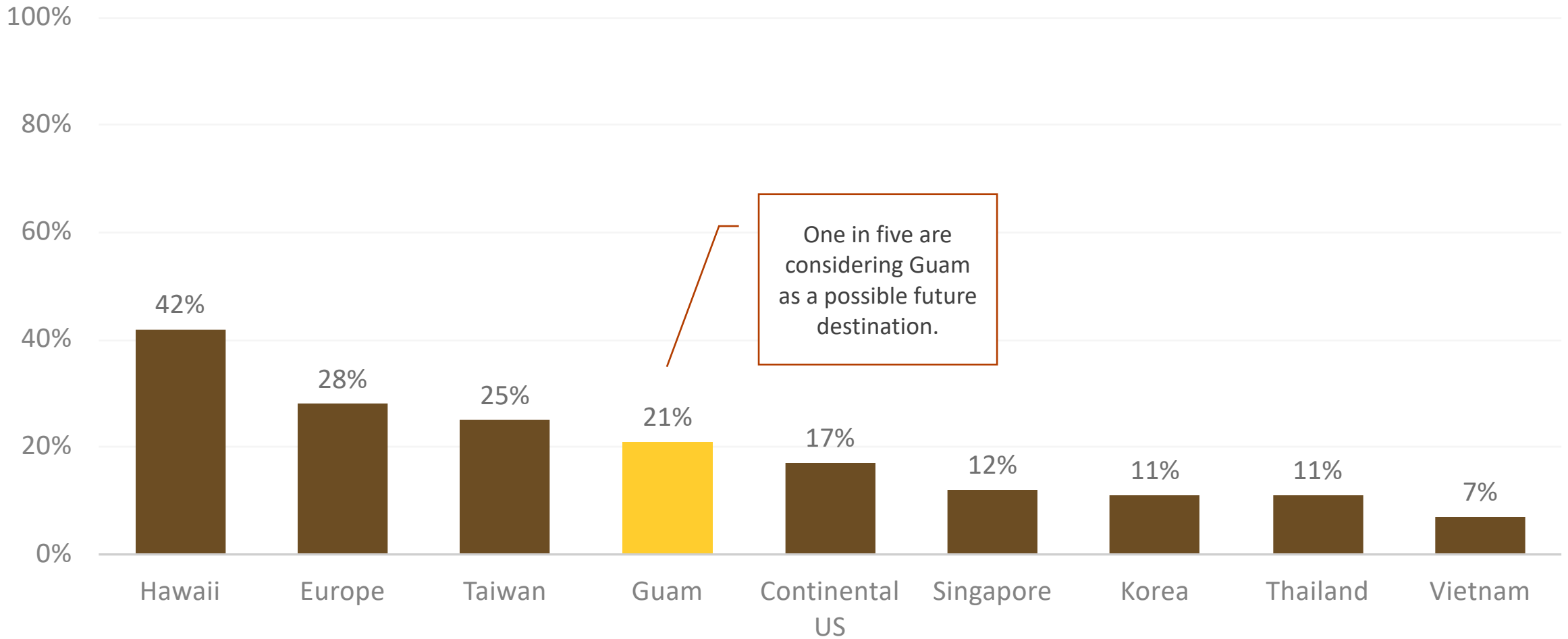


FUTURE TRAVEL PLANS

The Japan market will take time to recover.



POTENTIAL FUTURE TRAVEL DESTINATIONS



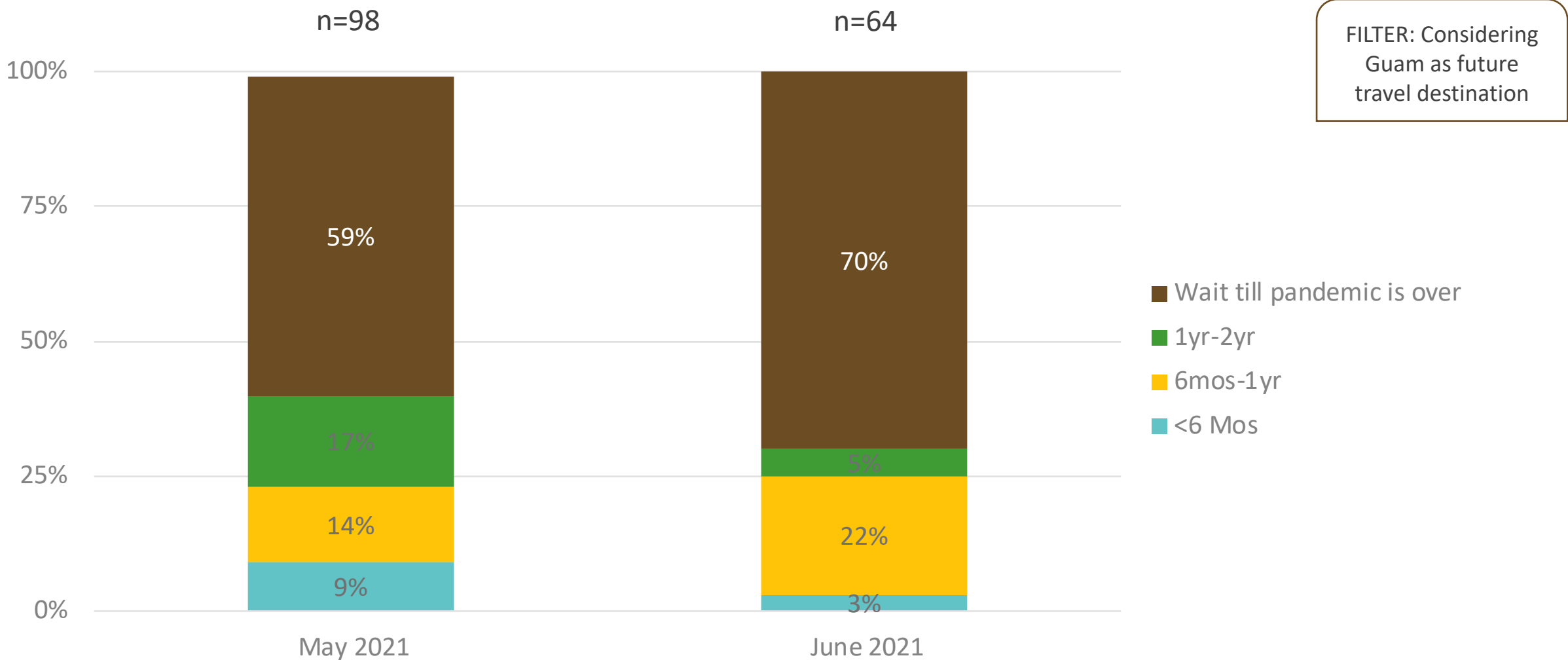
POTENTIAL FUTURE TRAVEL DESTINATIONS

	May 2021	June 2021
Hawaii	38%	42%
Europe	26%	28%
Guam	30%	21%
Taiwan	25%	25%
Continental U.S.	15%	17%
Singapore	16%	12%
Korea	16%	11%
Thailand	13%	11%
Vietnam	7%	7%
Indonesia	6%	5%

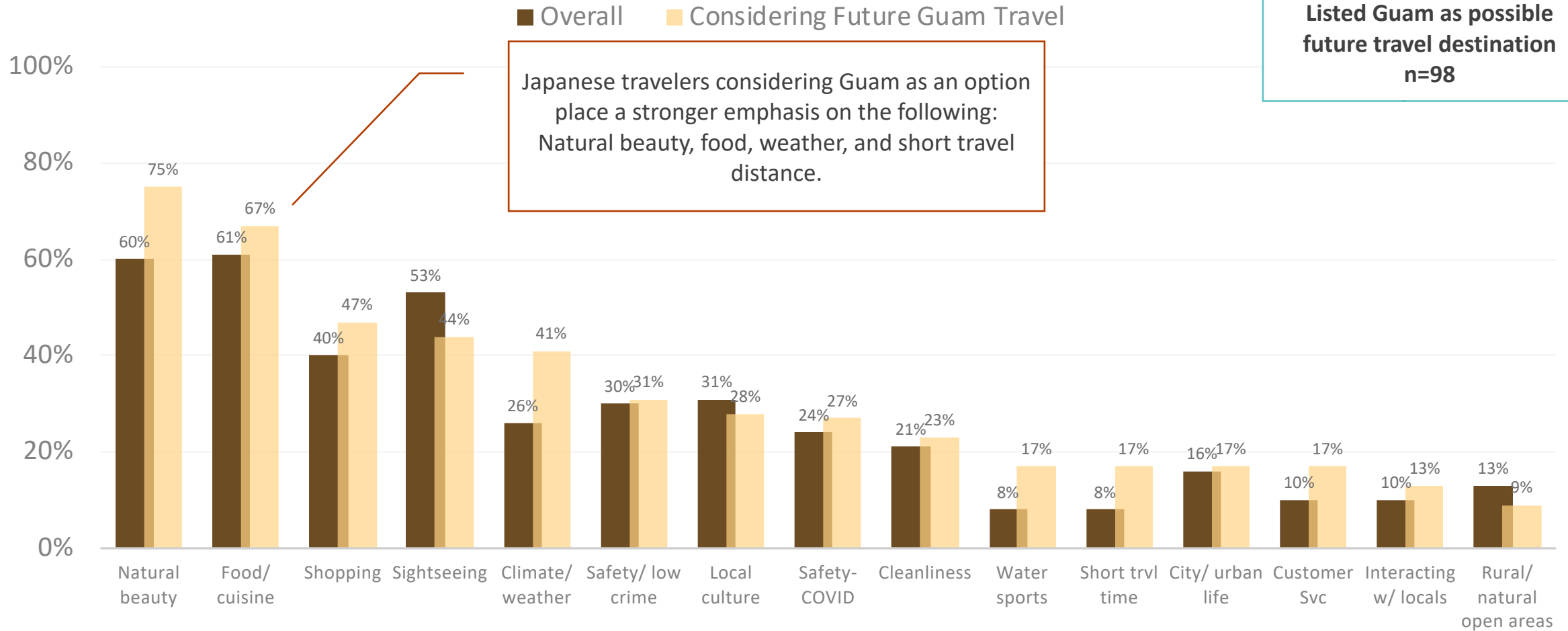


The proportion of Japanese visitors are considering Guam as potential travel destinations is down this reporting period.

TIMING OF FUTURE TRAVEL TO GUAM



APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS



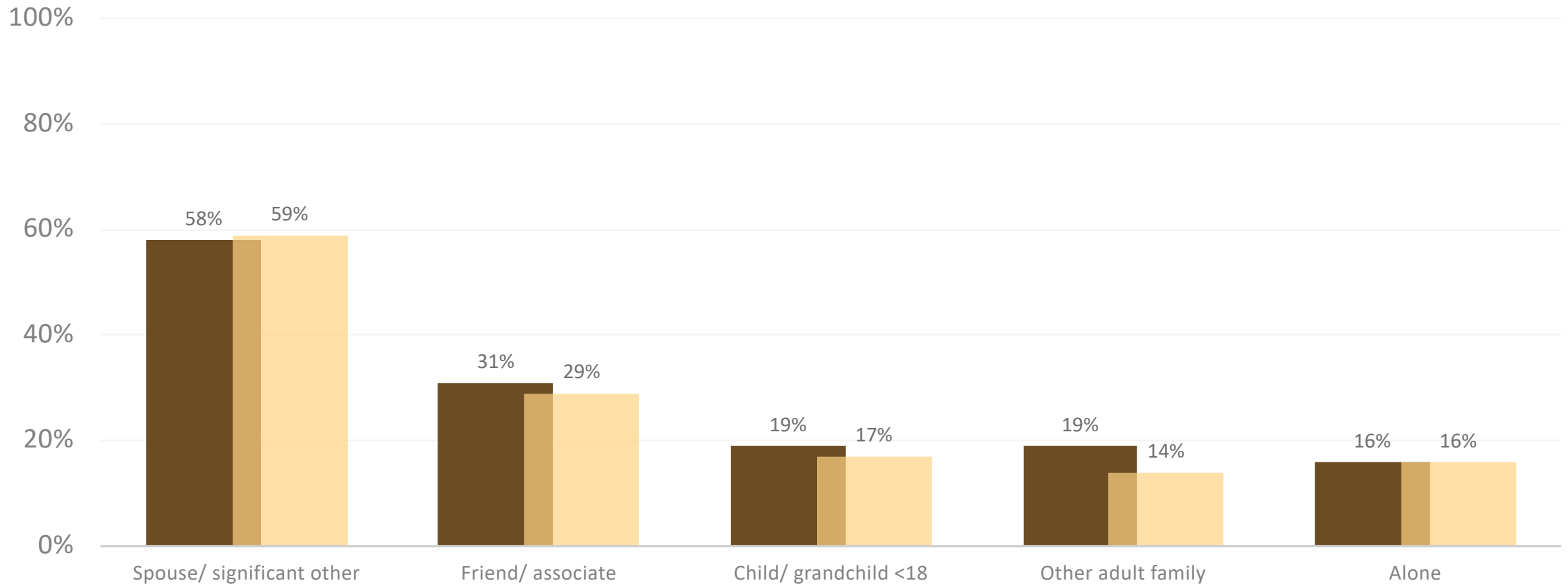
APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS

	May 2021	June 2021
Natural beauty	64%	60%
Food/ cuisine	59%	61%
Sightseeing	51%	53%
Shopping	41%	40%
Safety- crime	33%	30%
Local culture	32%	31%
Climate/ weather	27%	26%
Safety- COVID	26%	24%
Cleanliness	21%	21%
Rural/ open spaces	16%	13%
Interacting w/ locals	16%	10%
City/ urban life	10%	16%
Water sports	13%	8%
Short travel time	11%	8%



FUTURE INTERNATIONAL TRAVEL PARTY

■ May-21 ■ Jun-21



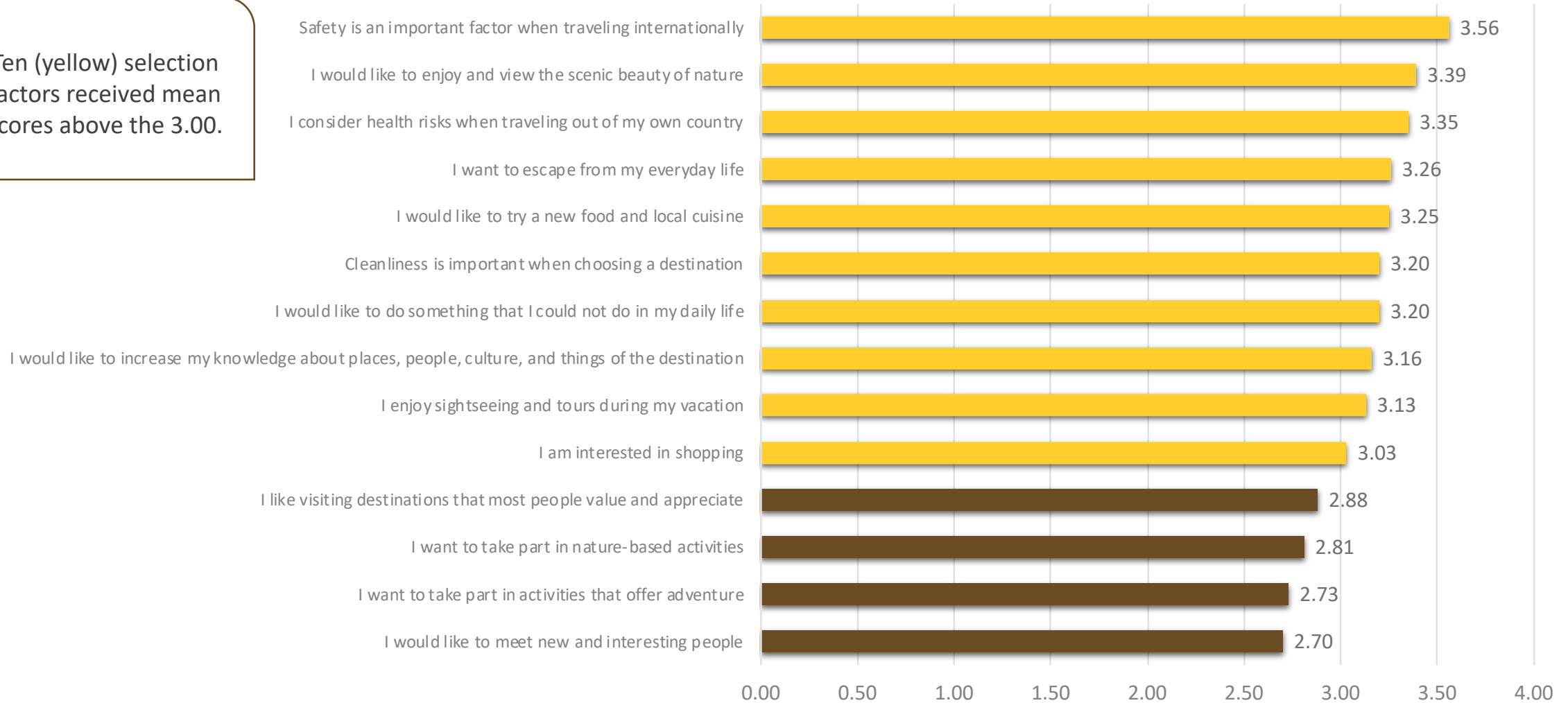
Q: Thinking of your travel plans post-COVID-19, who are you most looking forward to traveling with to an international destination?



DESTINATION SELECTION FACTORS – IMPORTANCE

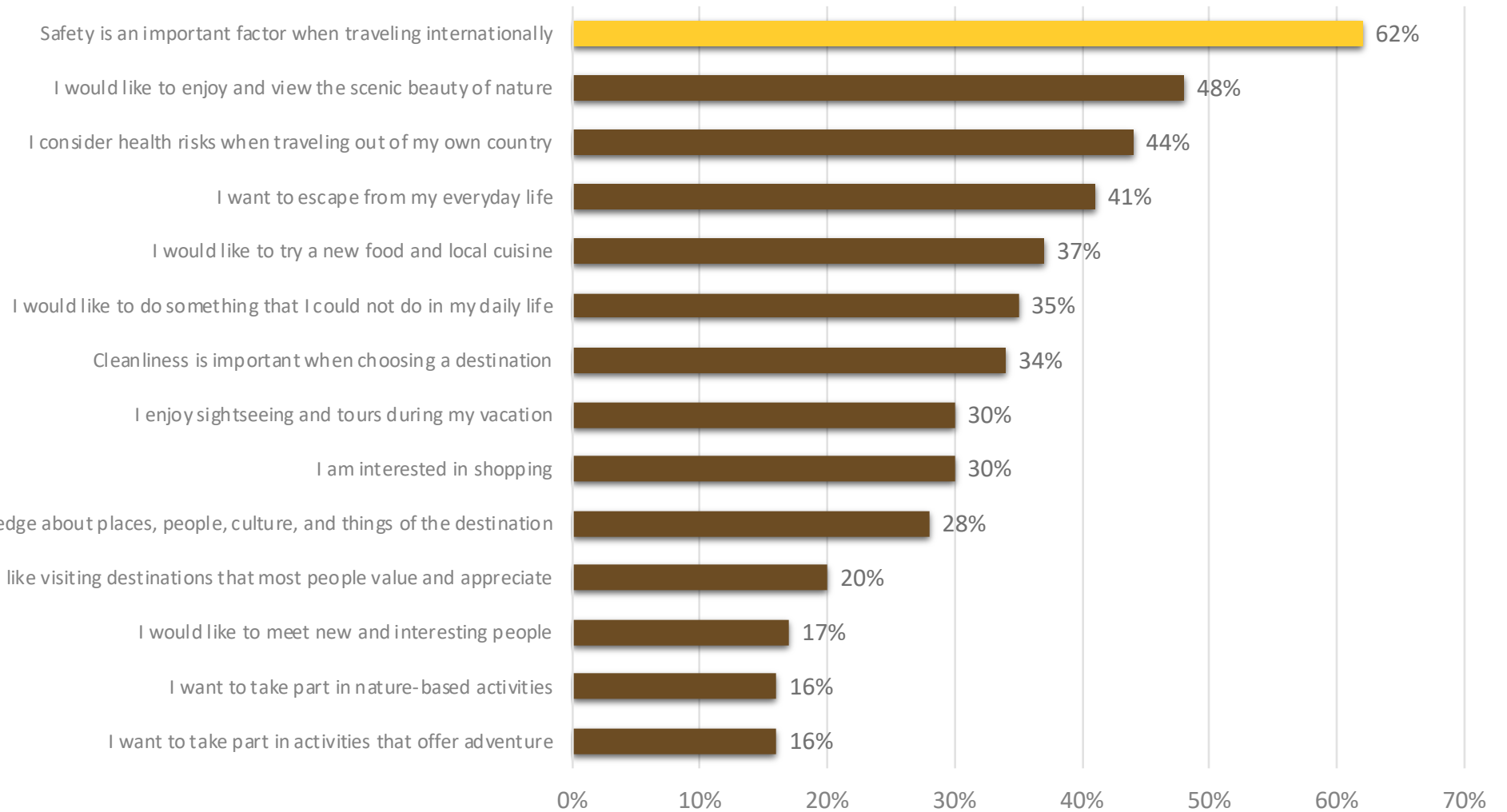
MEAN SCORE 4PT SCALE

Ten (yellow) selection factors received mean scores above the 3.00.

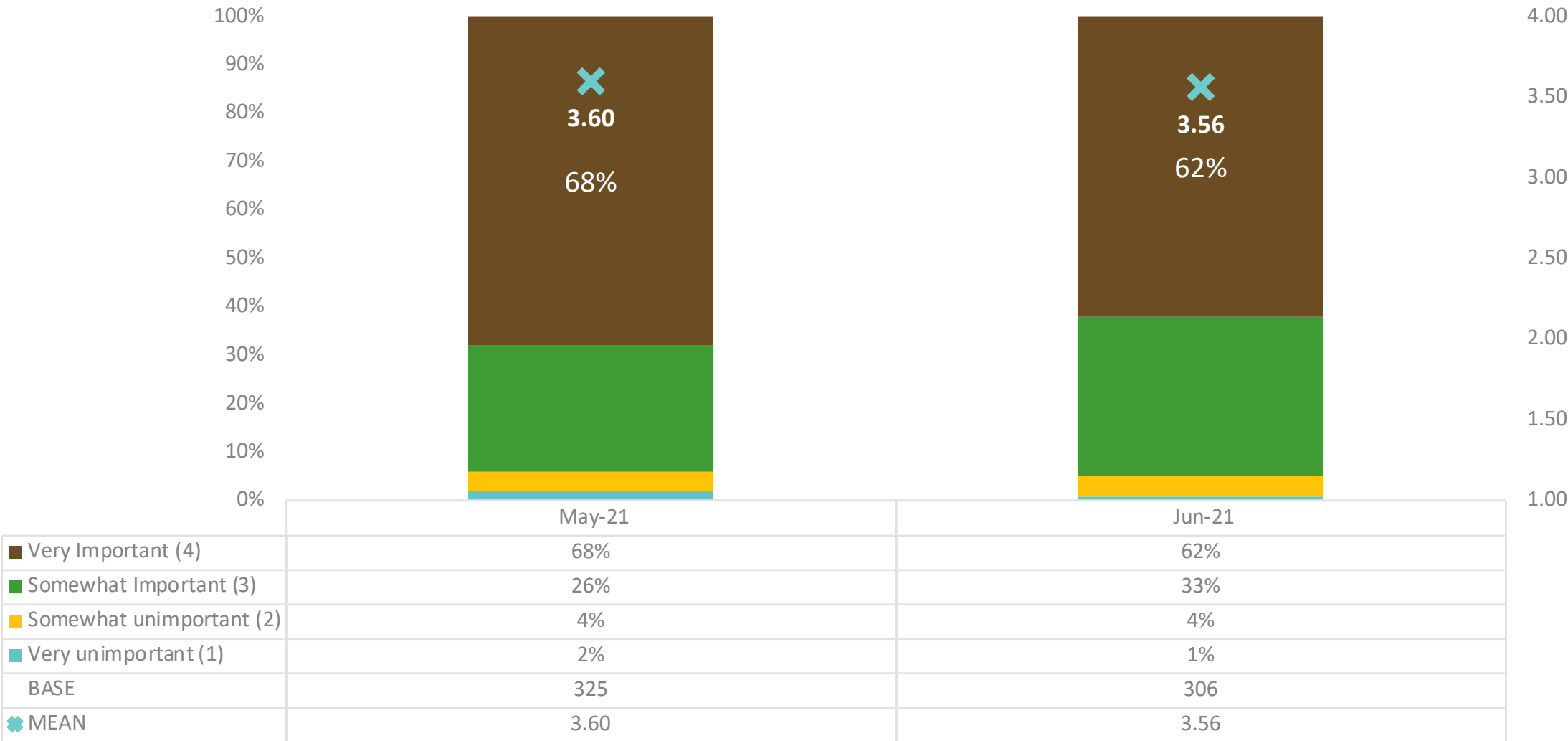


DESTINATION SELECTION FACTORS – VERY IMPORTANT / TOP BOX

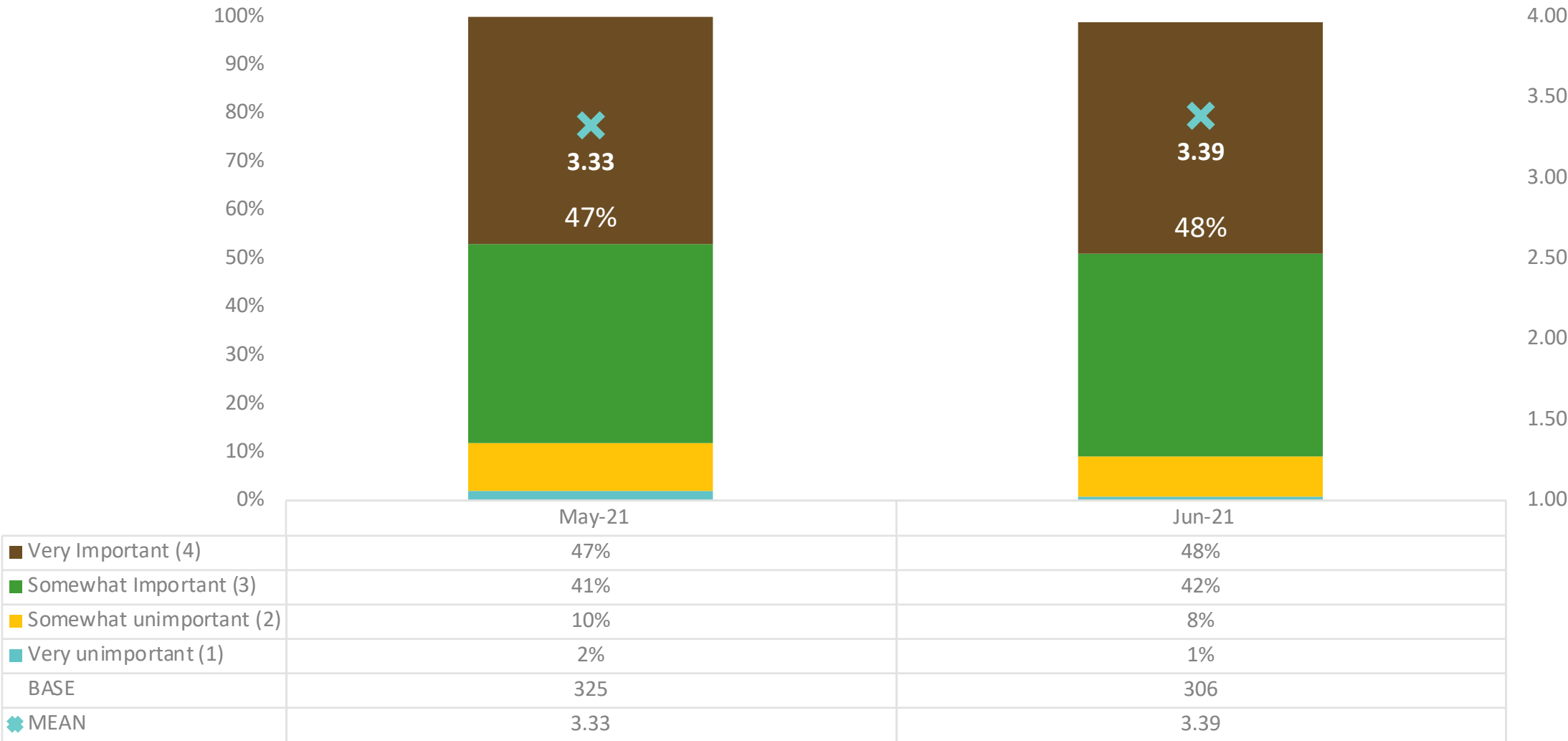
Just one (yellow) selection factor received a top box (very important) score above 50%



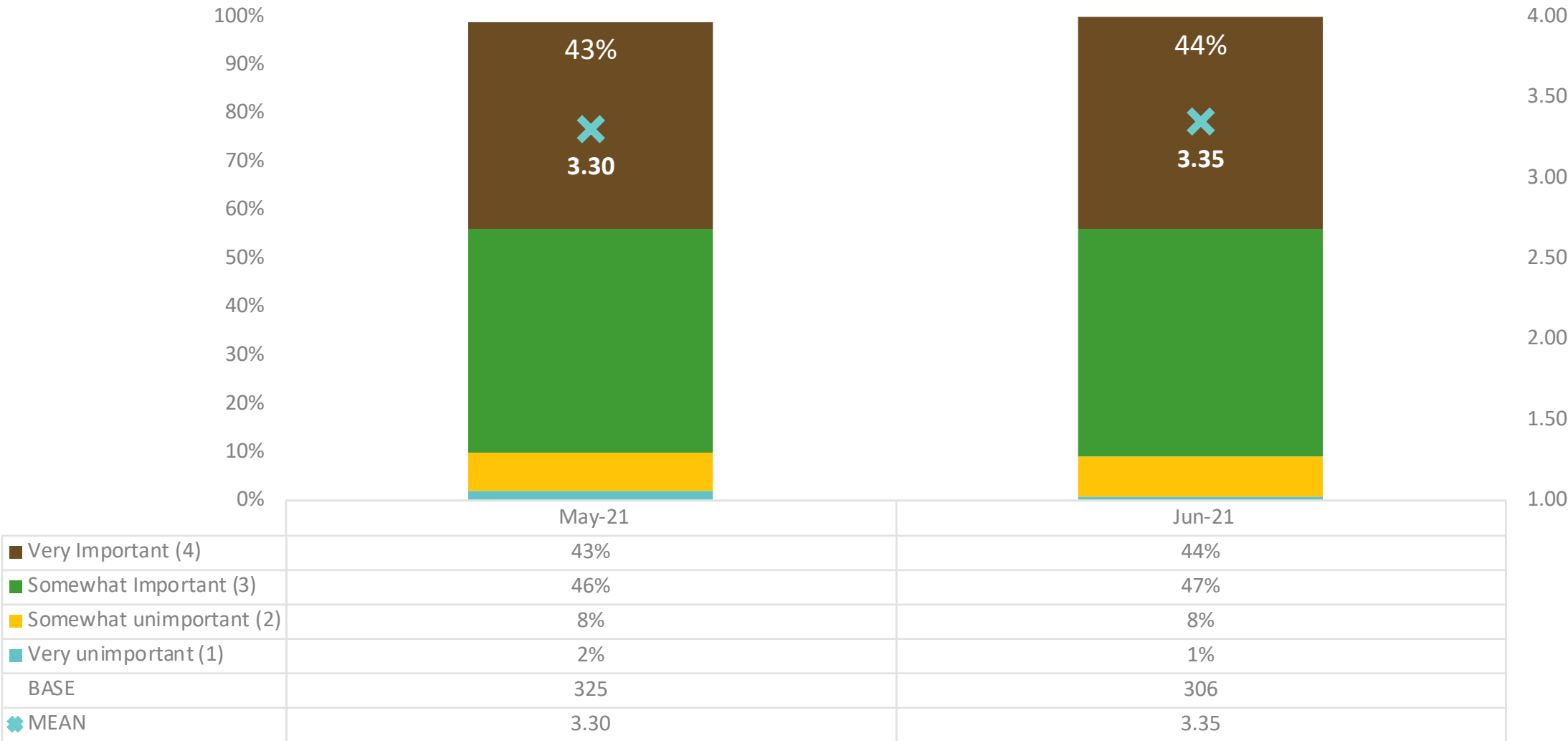
Safety is an important factor when traveling internationally



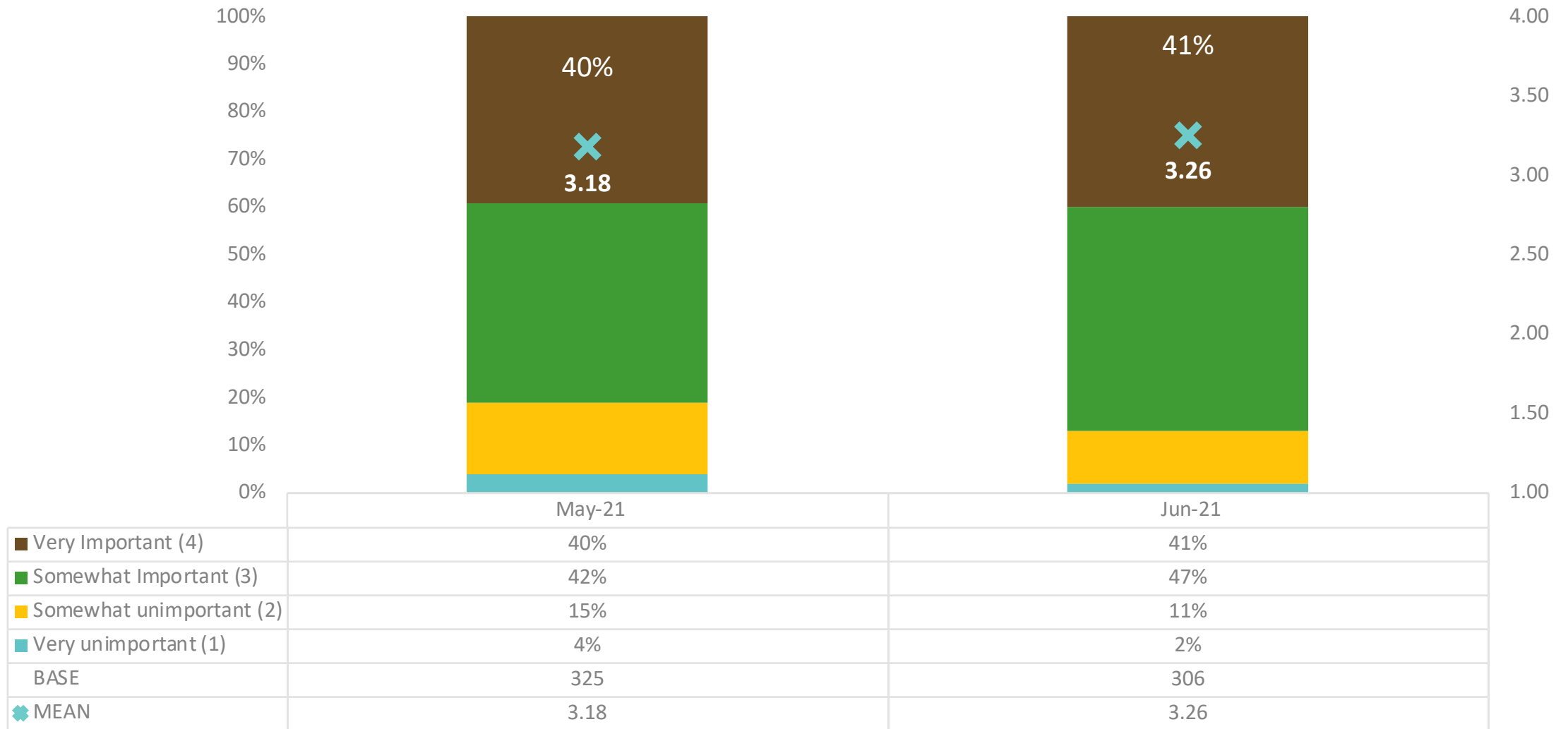
I would like to enjoy and view the scenic beauty of nature



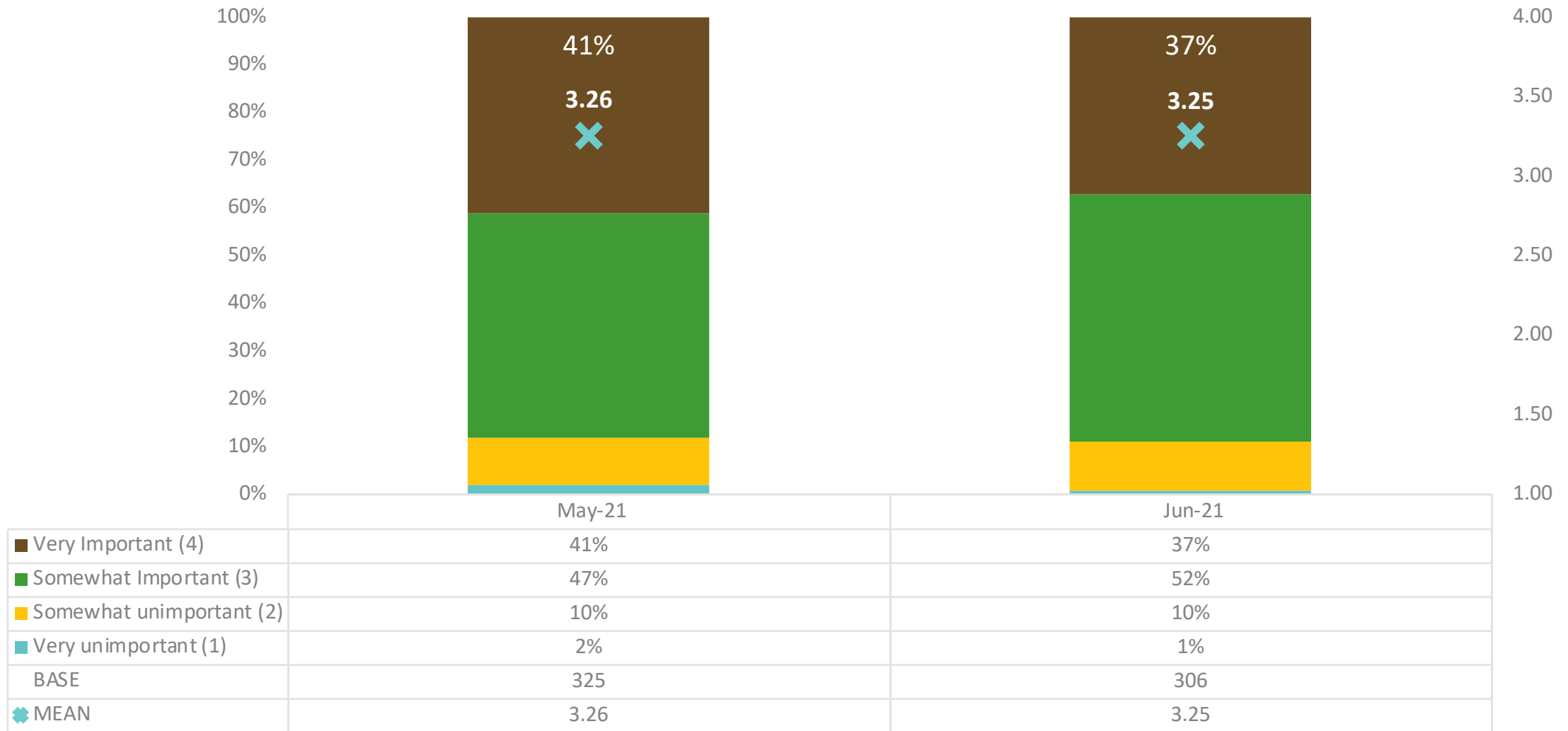
I consider health risks when traveling out of my own country



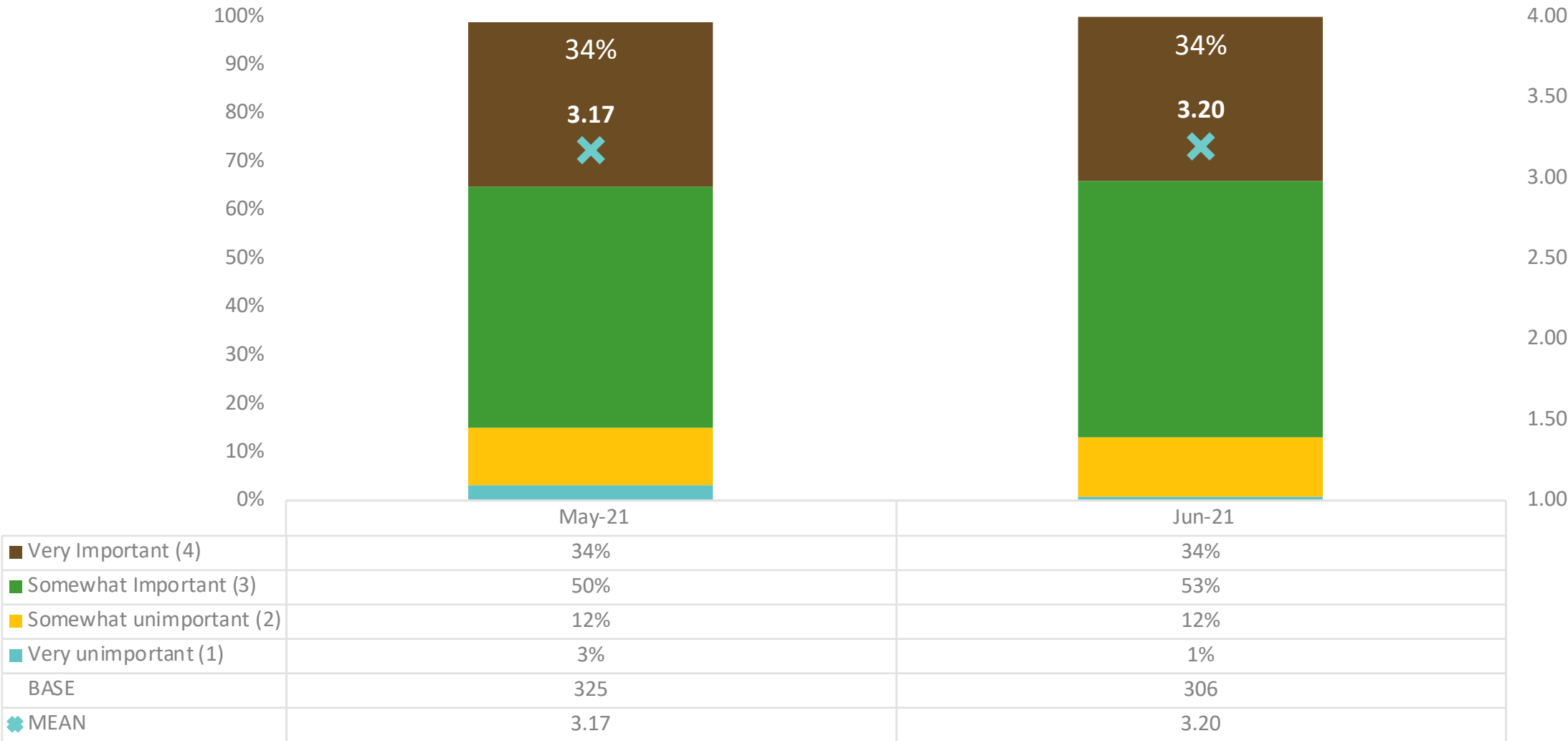
I want to escape my everyday life



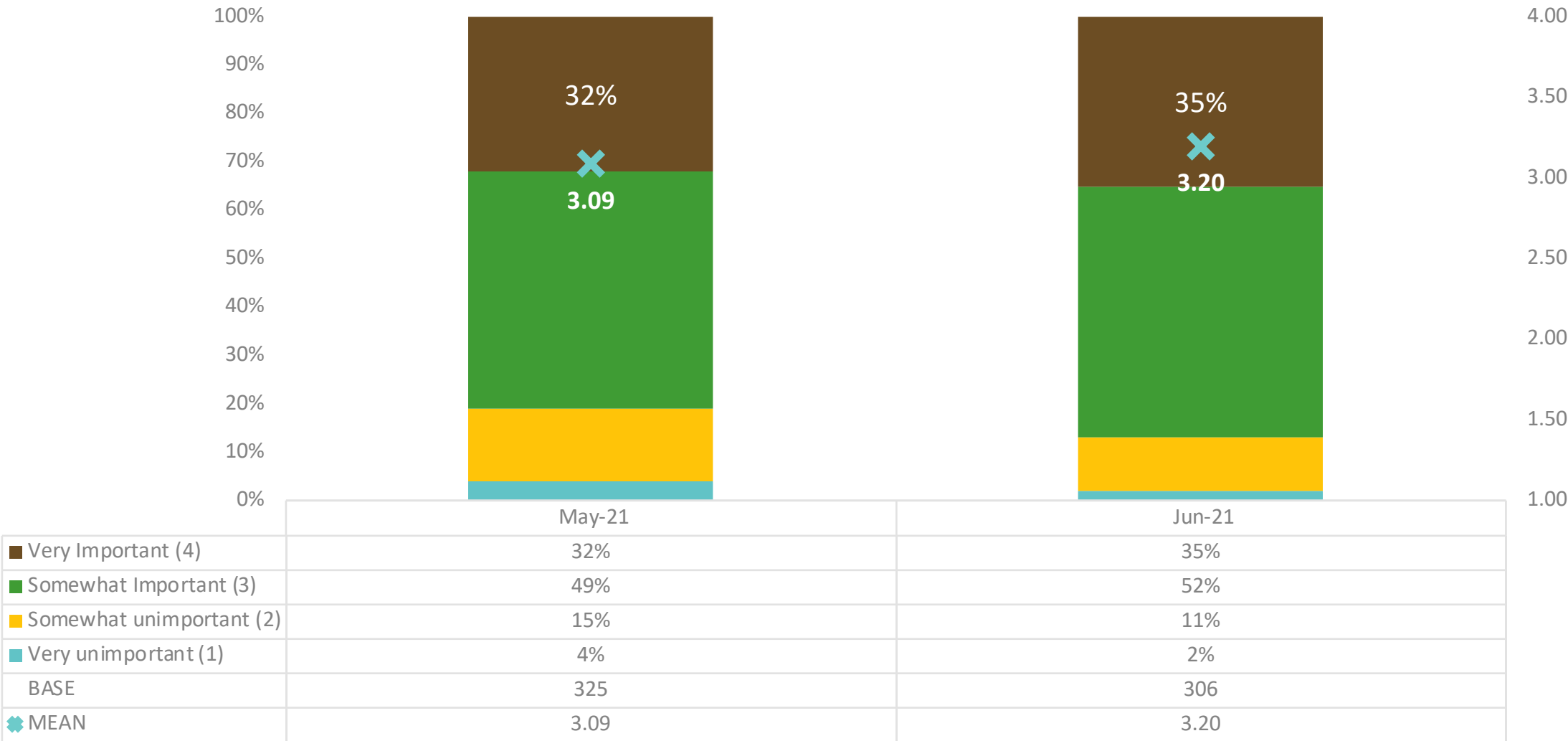
I would like to try a new food and local cuisine



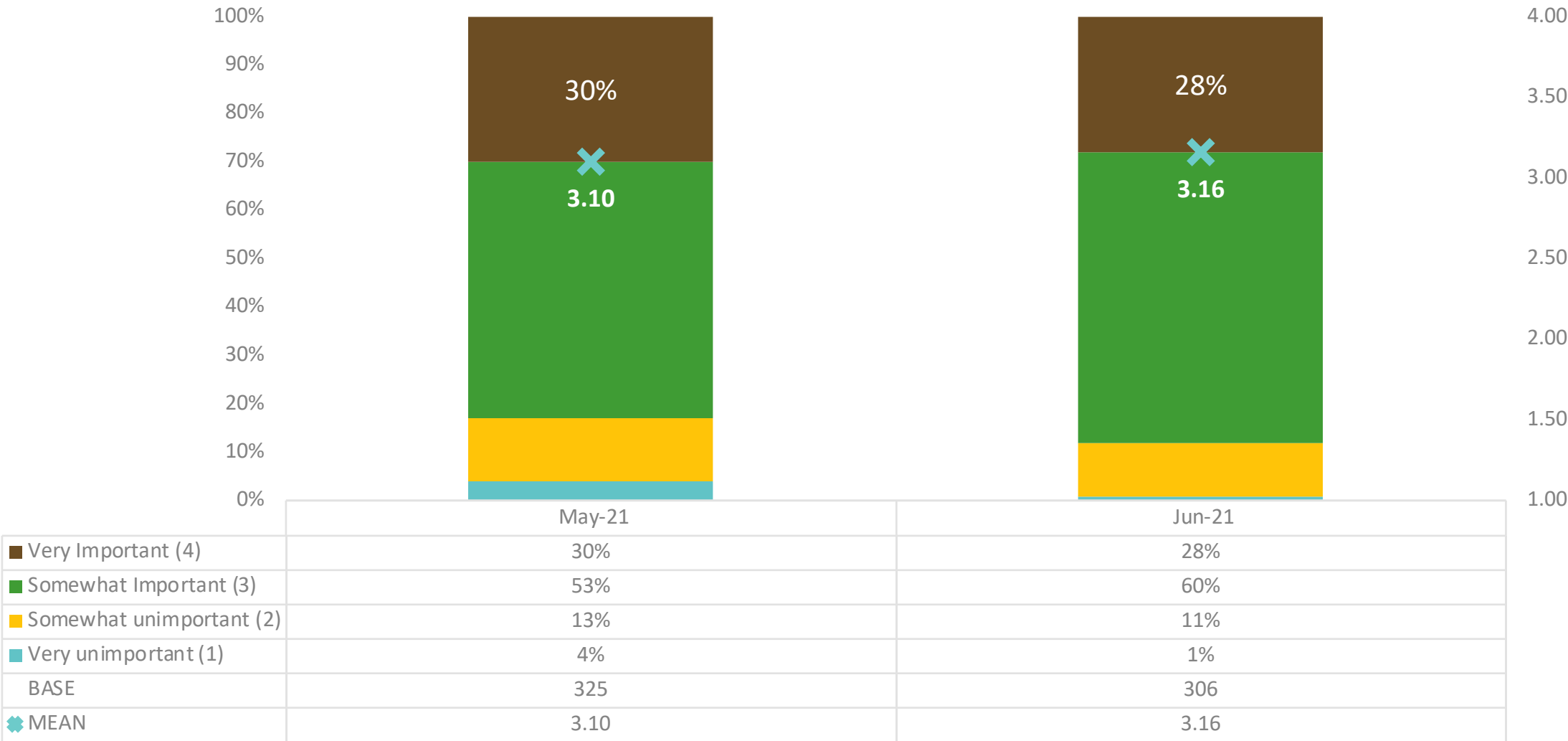
Cleanliness is important when choosing a destination



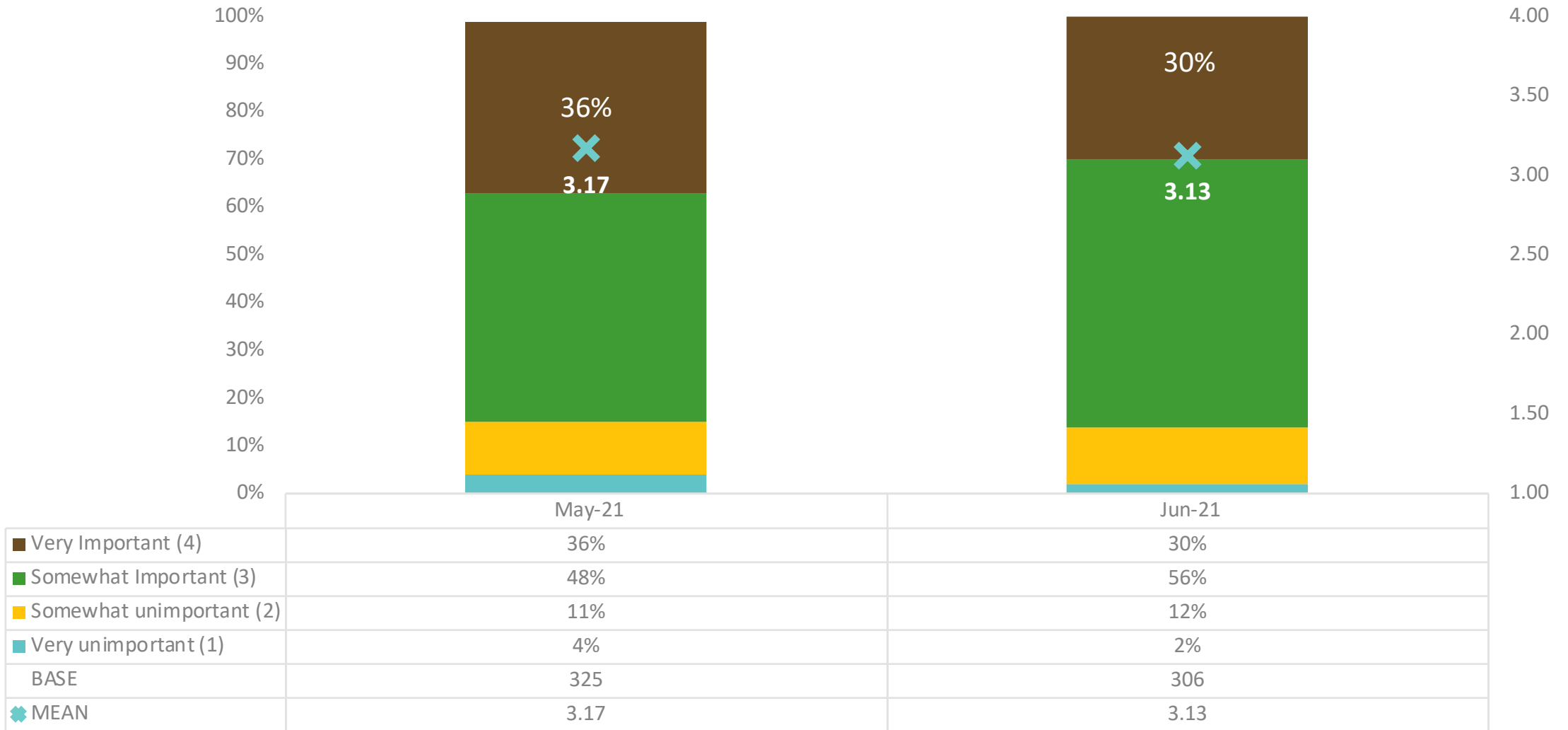
I would like to do something that I could not do in my daily life



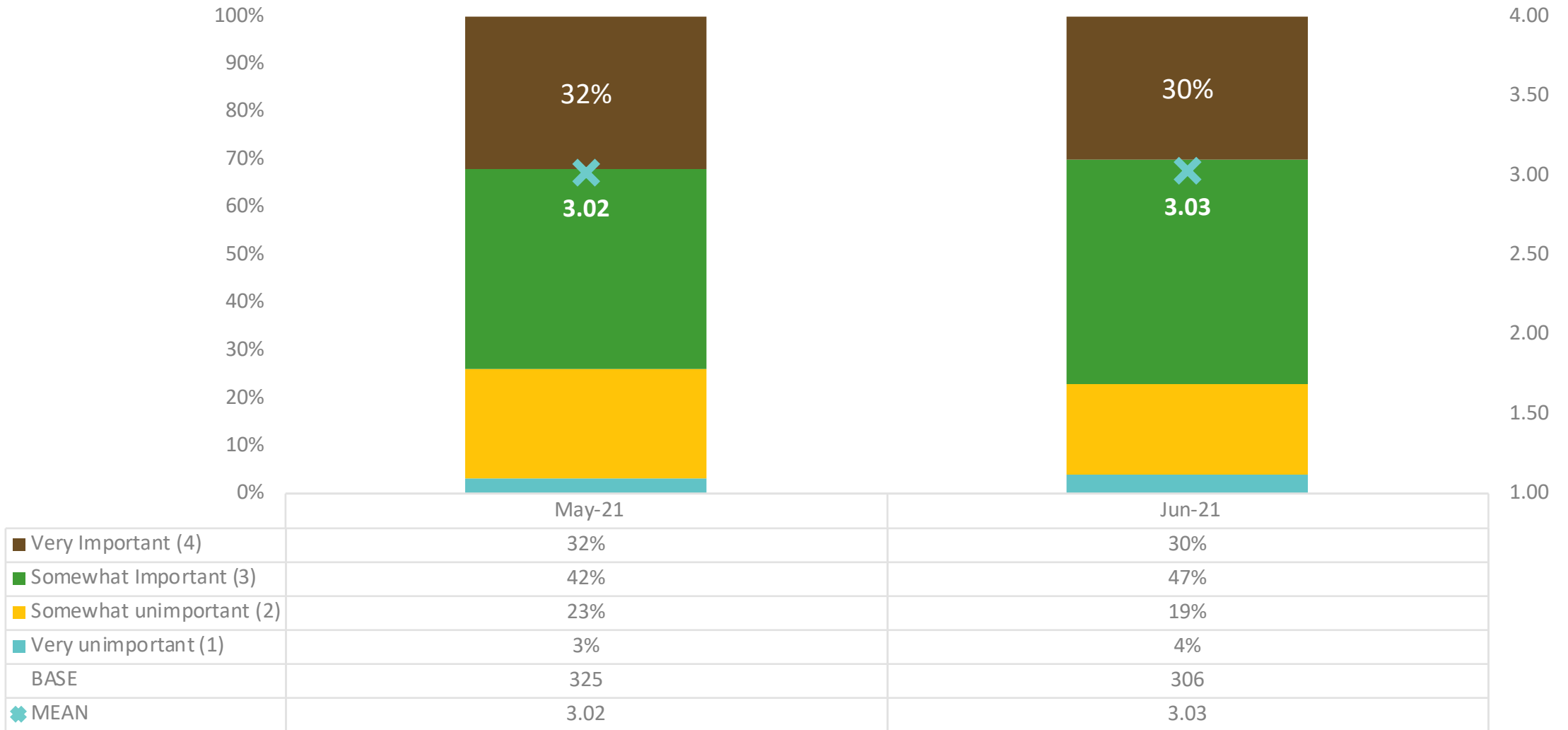
I would like to increase my knowledge about places, people, culture, and things of the destination



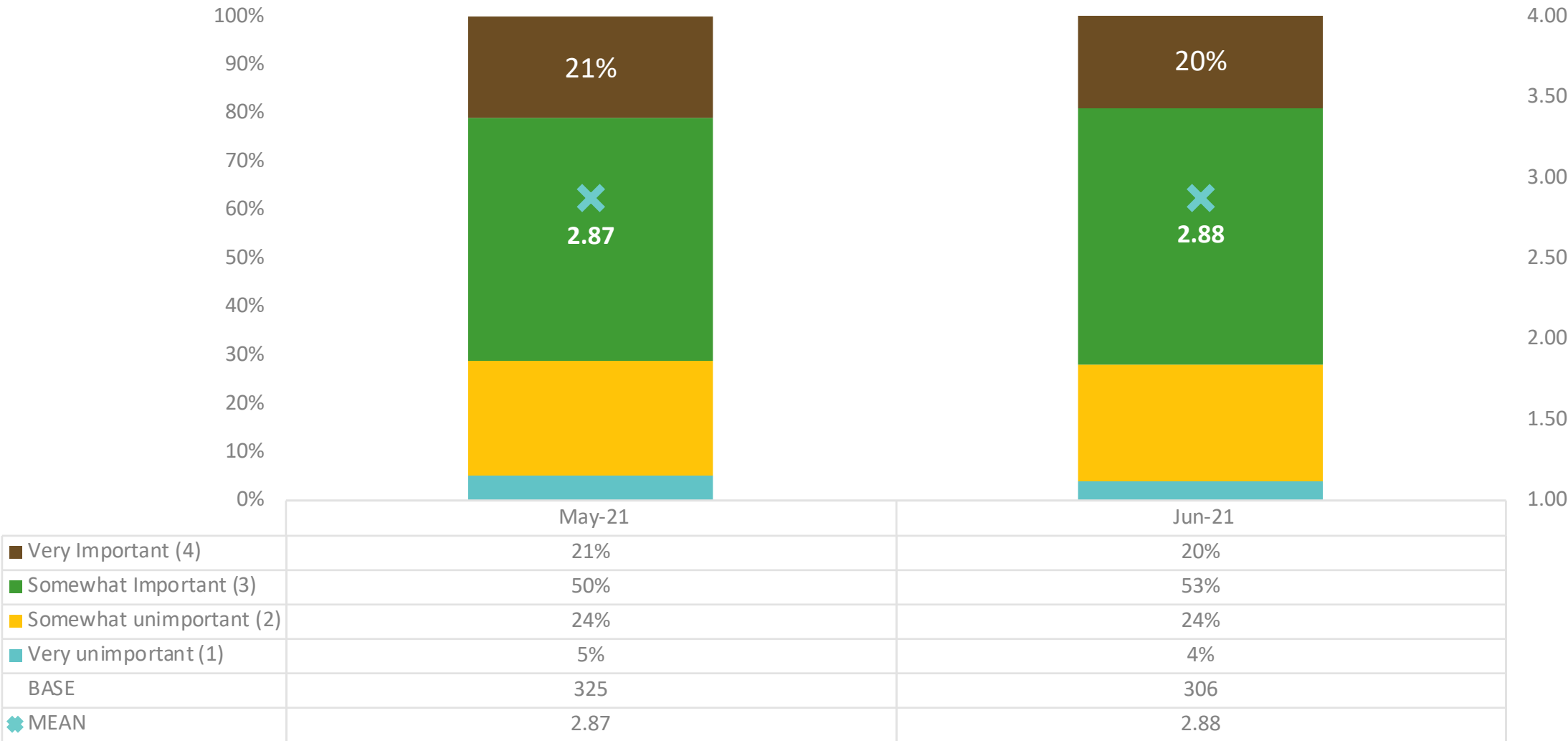
I enjoy sightseeing and tours during my vacation



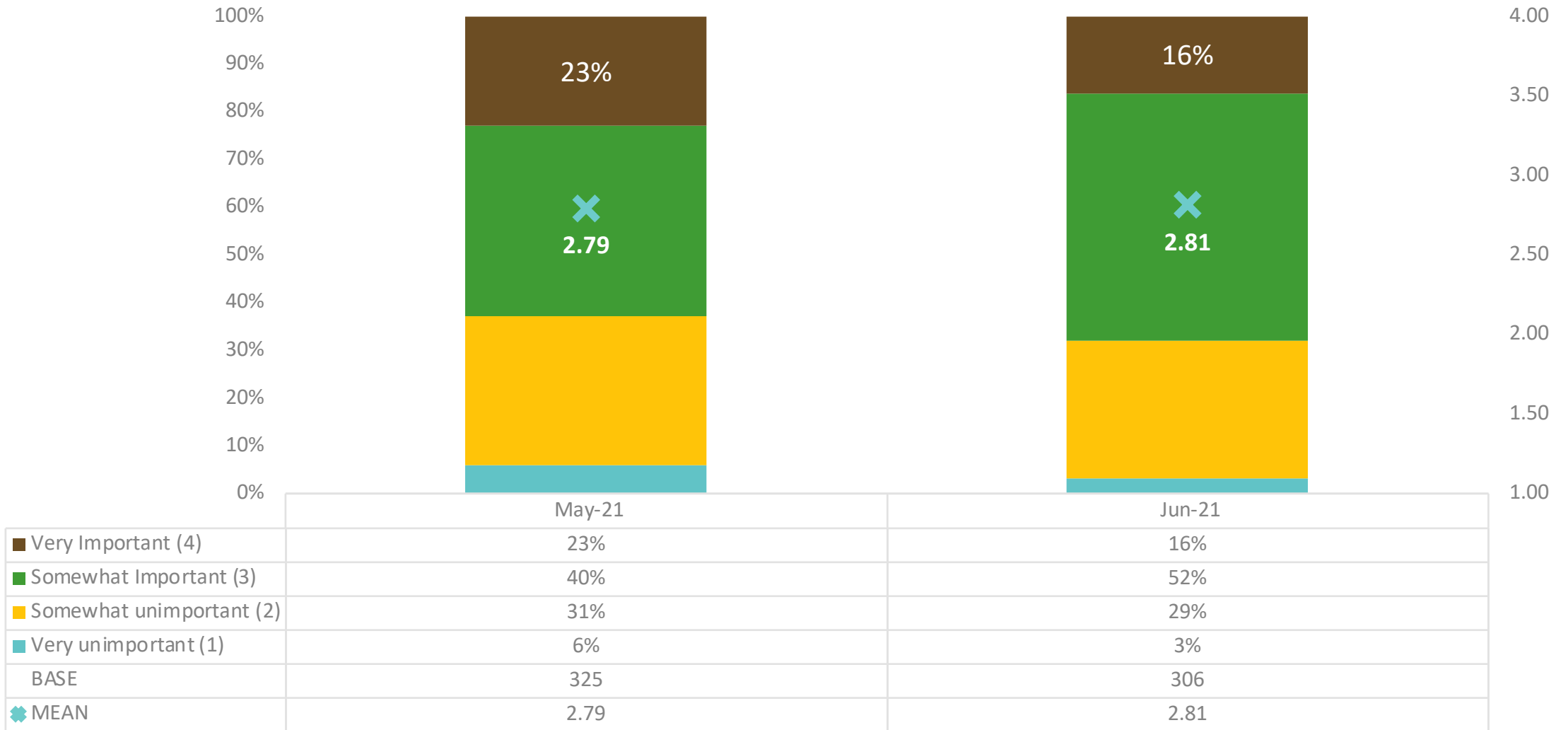
I am interested in shopping



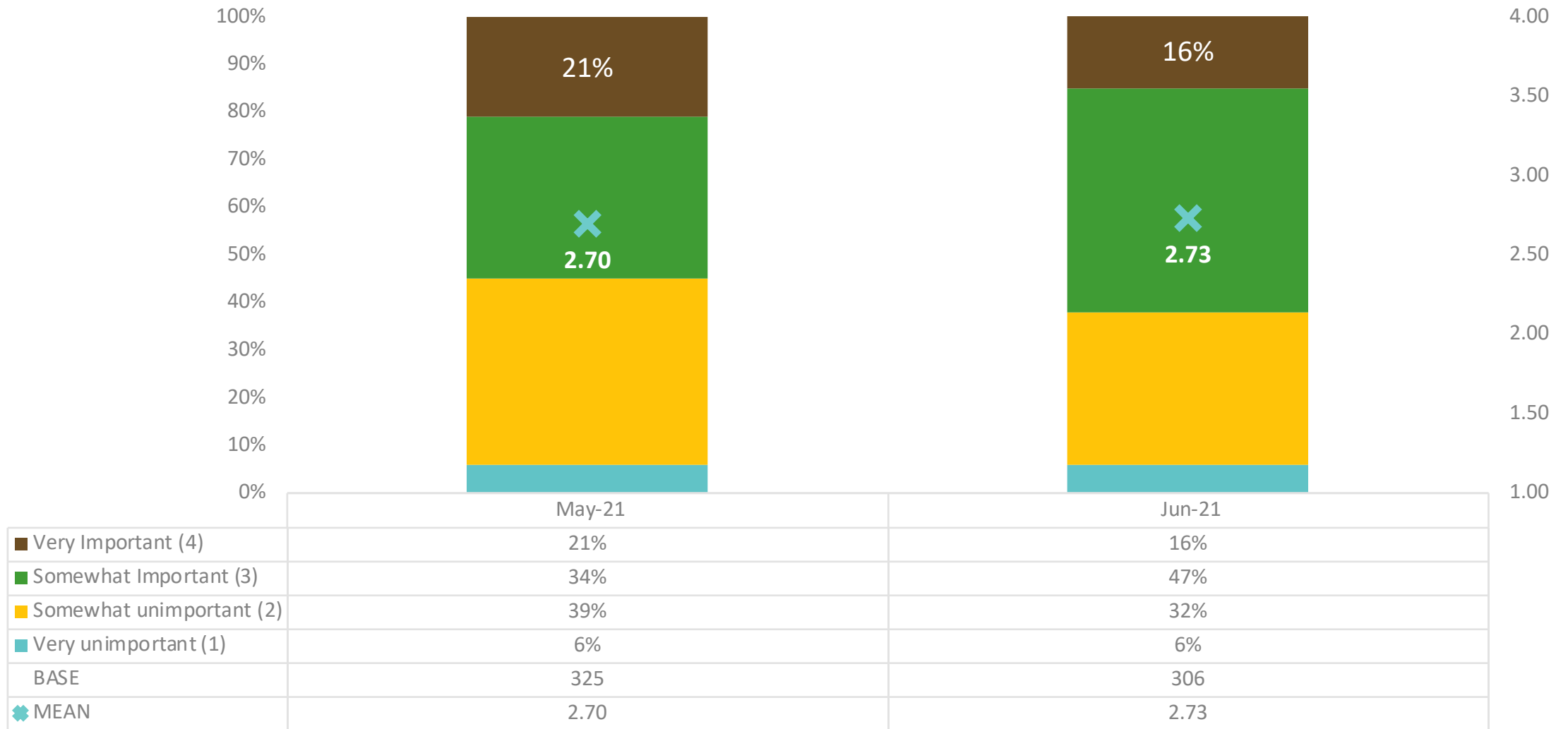
I like visiting destinations that most people value and appreciate



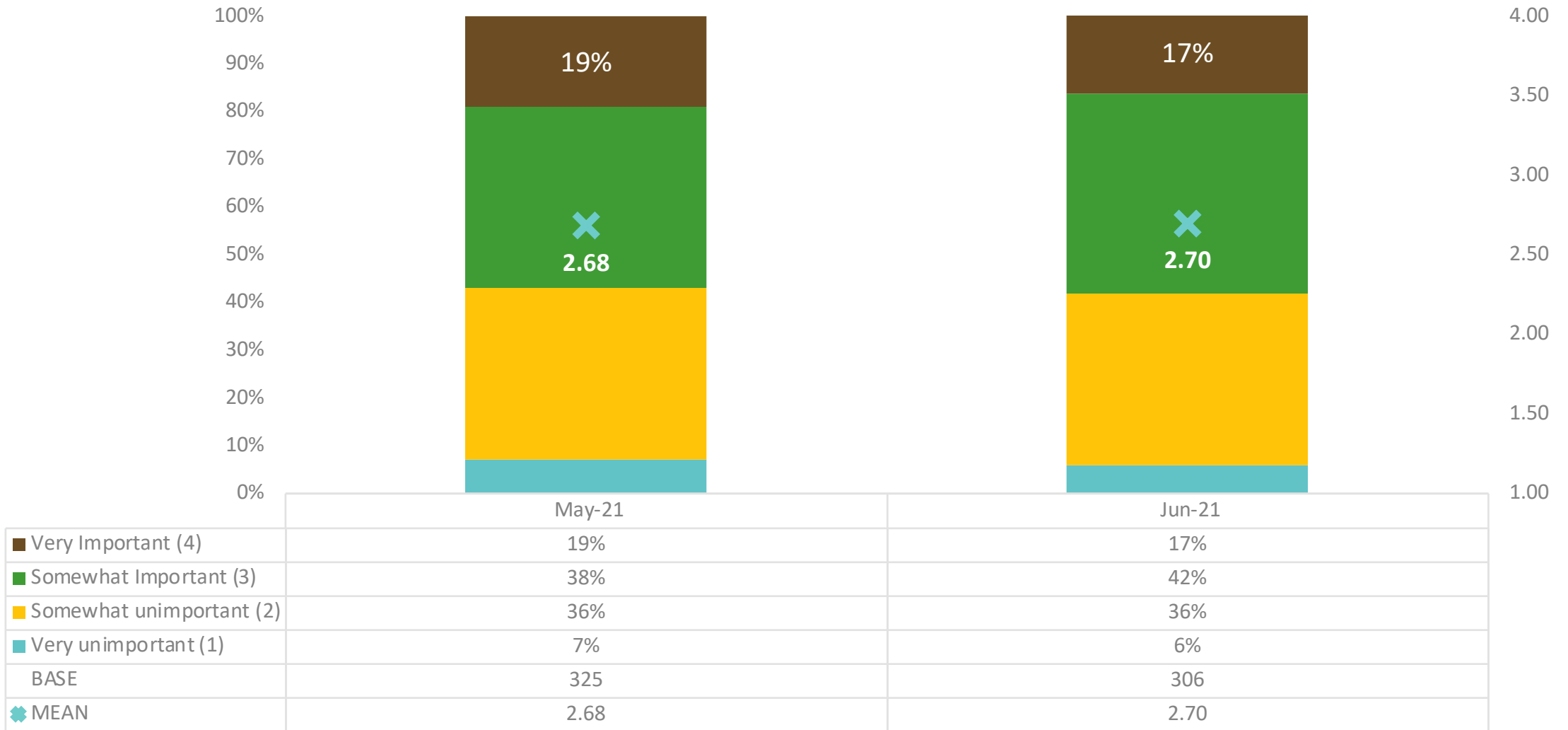
I want to take part in nature-based activities



I want to take part in activities that offer adventure



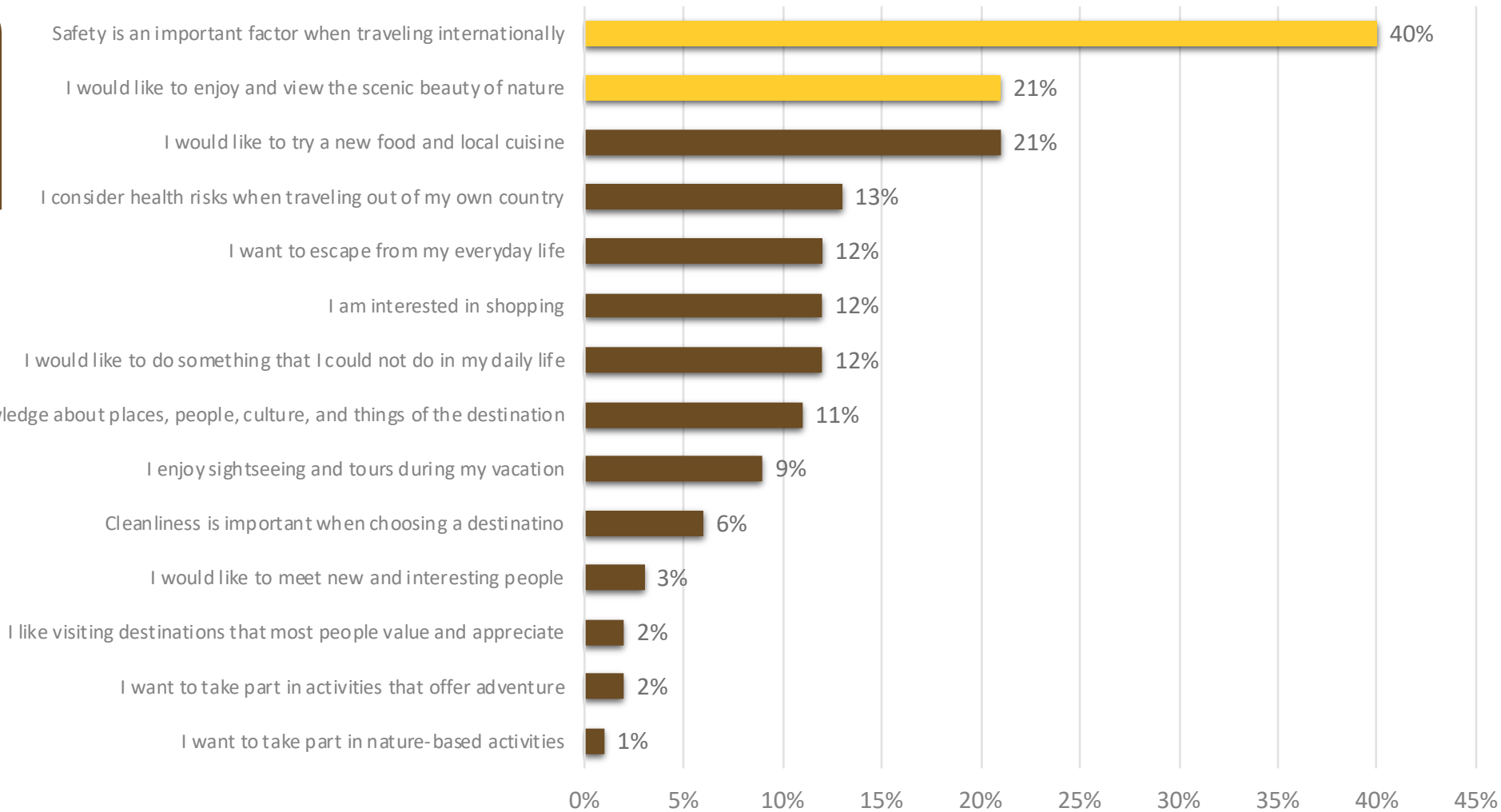
I would like to meet new and interesting people



DESTINATION SELECTION FACTORS – TOP TWO

The two most important selection factors were safety and the natural beauty of the destination.

Base
n=267



DESTINATION SELECTION FACTORS – TOP TWO

	May 2021	June 2021
BASE	278	267
<i>Safety is an important factor when travelling internationally</i>	46%	40%
<i>I would like to enjoy and view the scenic beauty of nature</i>	19%	21%
<i>I would like to try a new food and local cuisine</i>	15%	21%
<i>I consider health risks when travelling out of my own country</i>	14%	13%
<i>I want to escape from my everyday life</i>	13%	12%
<i>I am interested in shopping</i>	10%	12%
<i>I would like to increase my knowledge about places, people, culture, and things of the destination</i>	9%	11%
<i>I enjoy sightseeing and tours during my vacation</i>	11%	9%
<i>I would like to do something that I could not do in my daily life</i>	8%	12%
<i>Cleanliness is important when choosing a destination</i>	10%	6%
<i>I would like to meet new and interesting people</i>	4%	3%
<i>I like visiting destinations that most people value and appreciate</i>	5%	2%
<i>I want to take part in nature-based activities</i>	3%	1%
<i>I want to take part in activities that offer adventure</i>	4%	2%





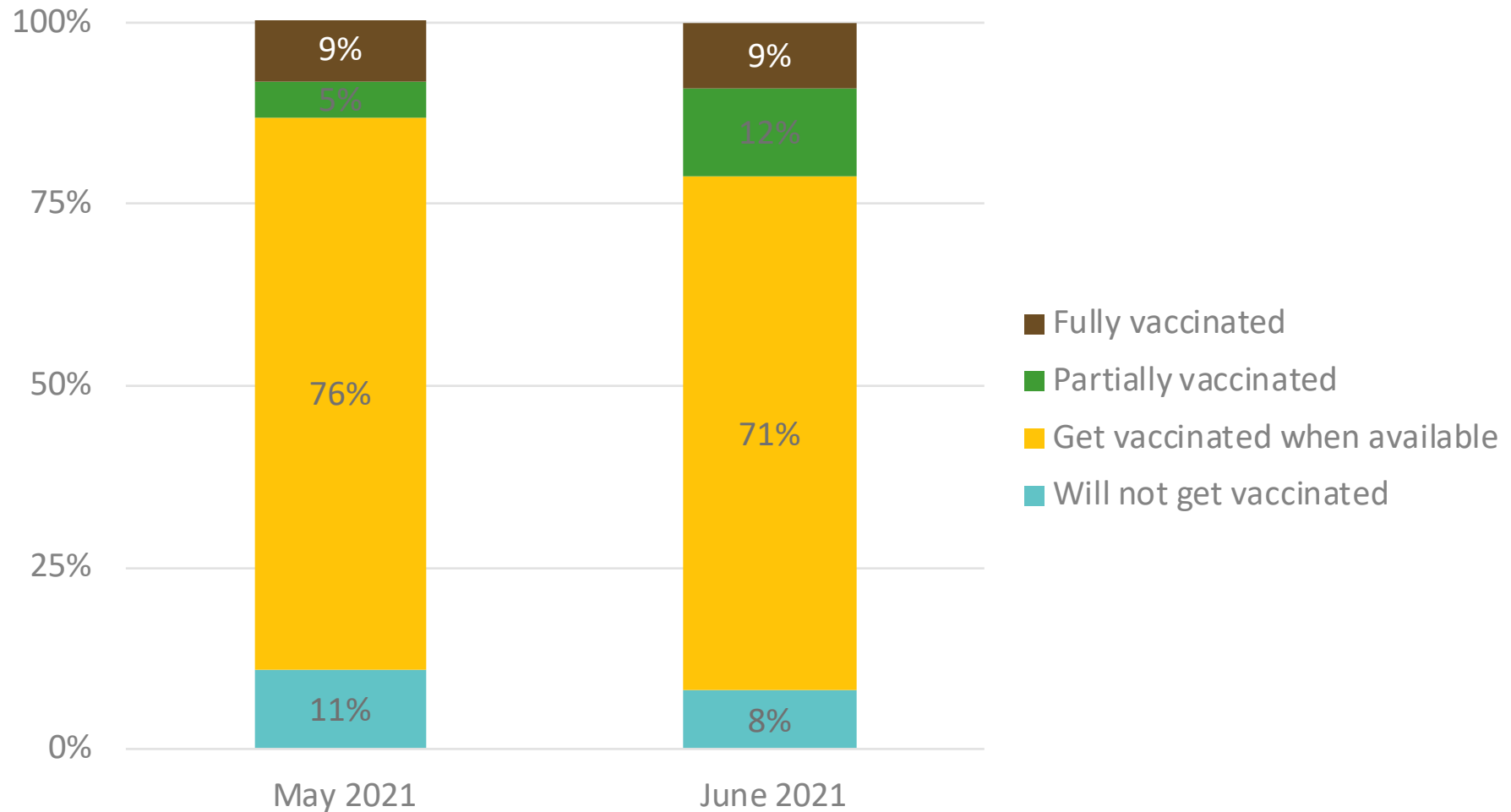
SECTION 2

COVID-19



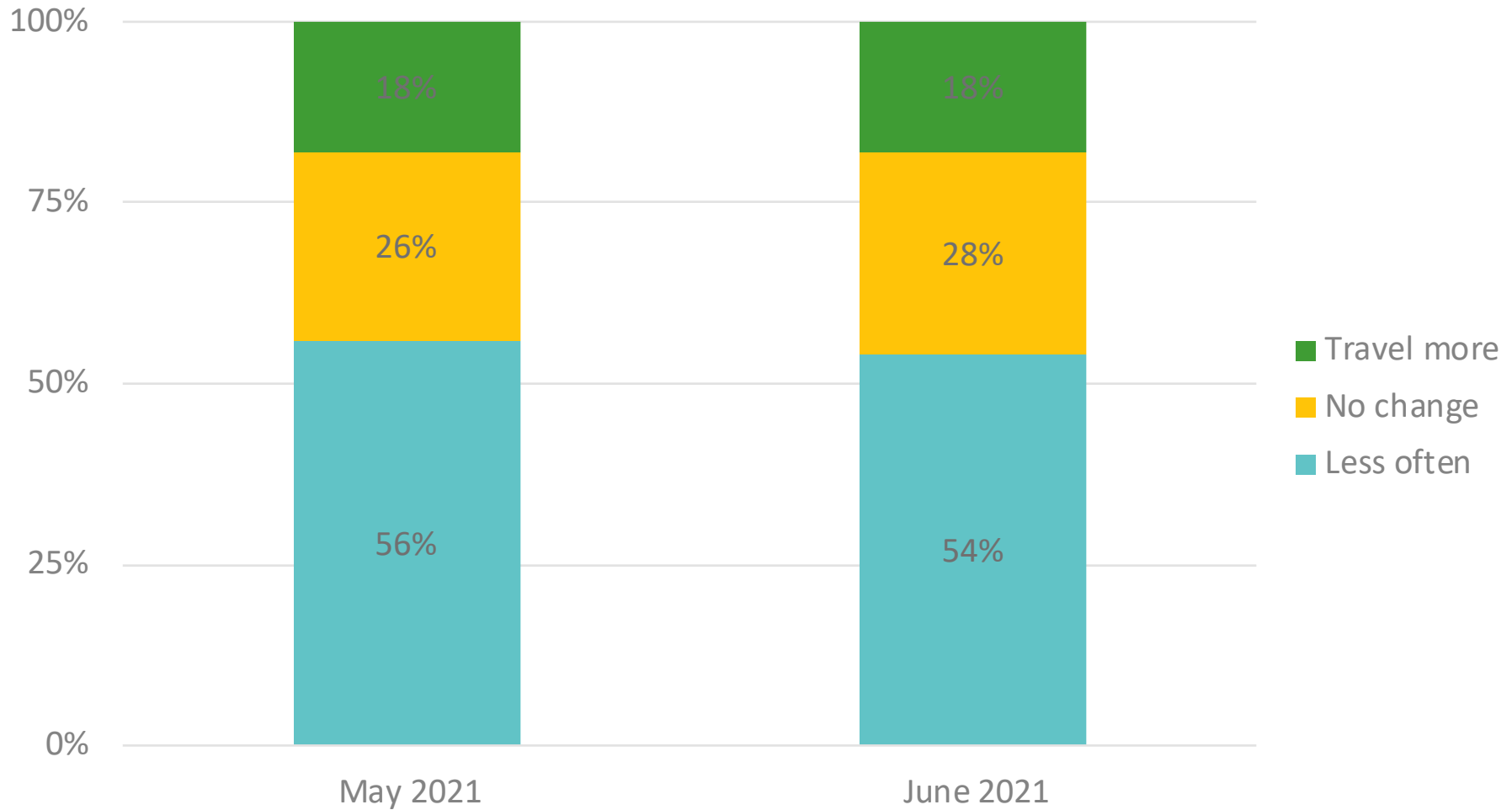
COVID-19 VACCINE STATUS

The proportion of respondents who are vaccinated is increasing, though the proportions are still relatively small.



POST-COVID TRAVEL

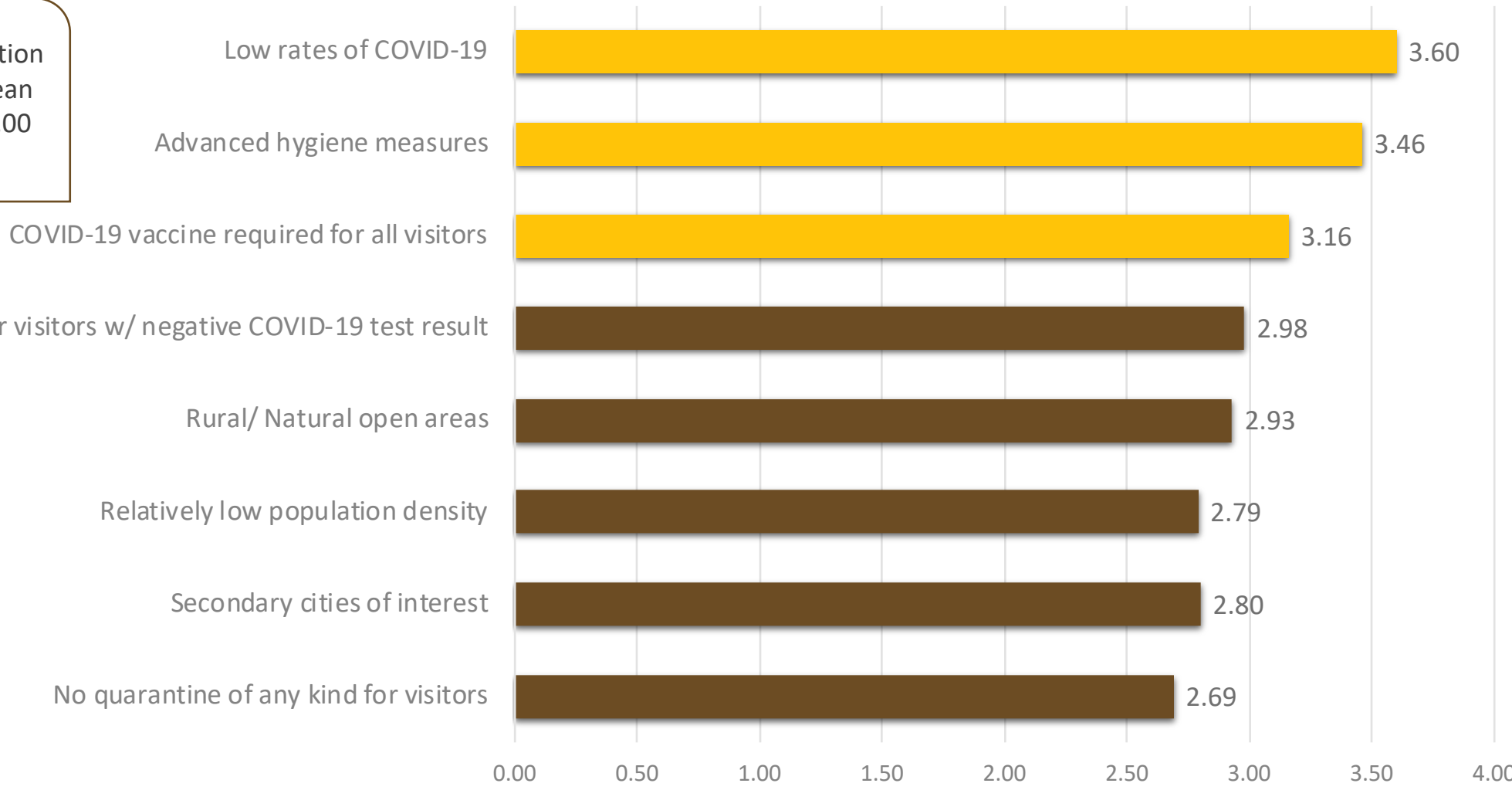
The Japanese travel market may take longer to recover fully.



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – MEAN SCORE

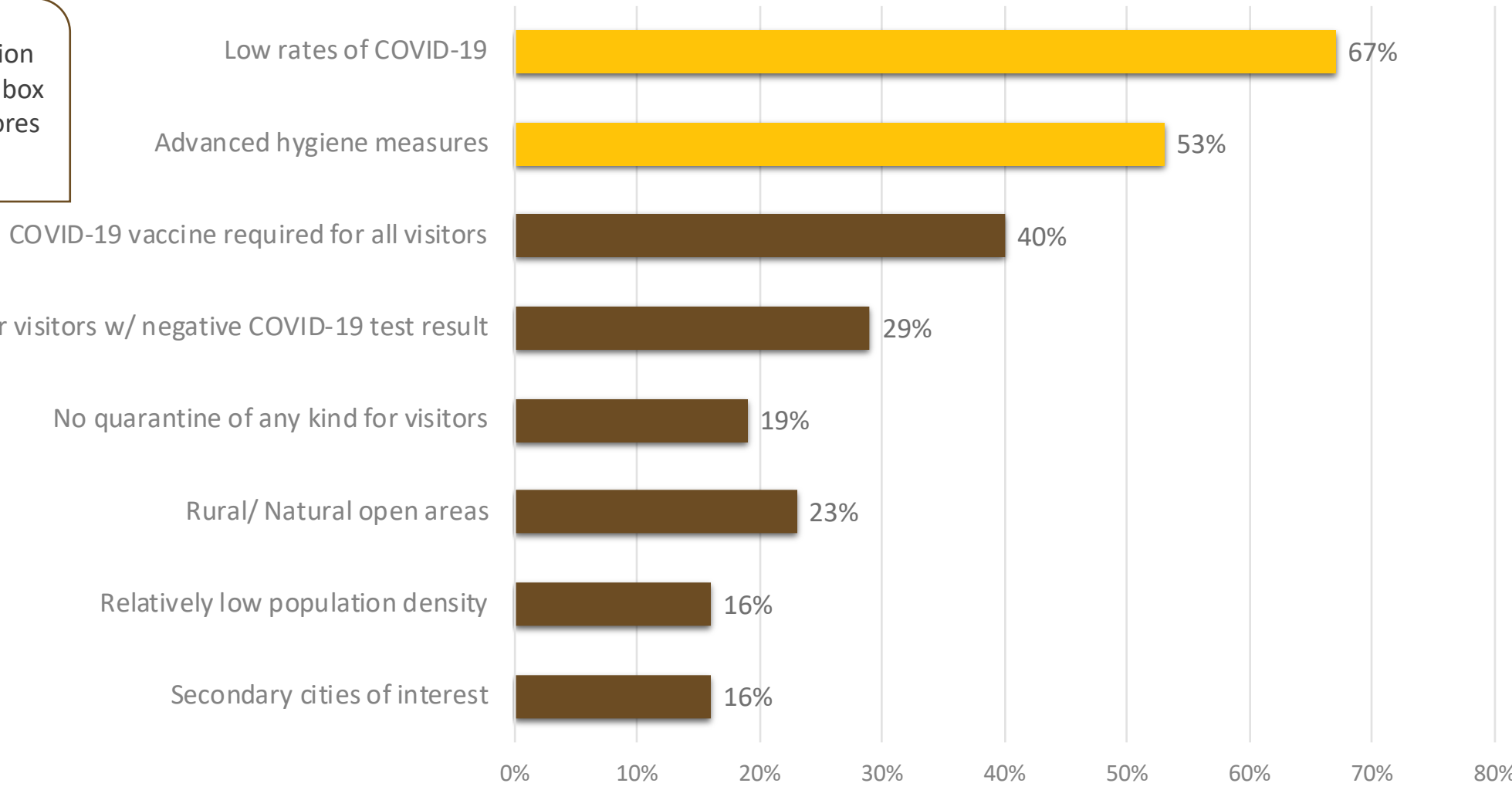
Three (yellow) selection factors received mean scores above the 3.00 threshold.



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – TOP BOX (VERY IMPORTANT)

Two (yellow) selection factors received top box (very important) scores above 50%

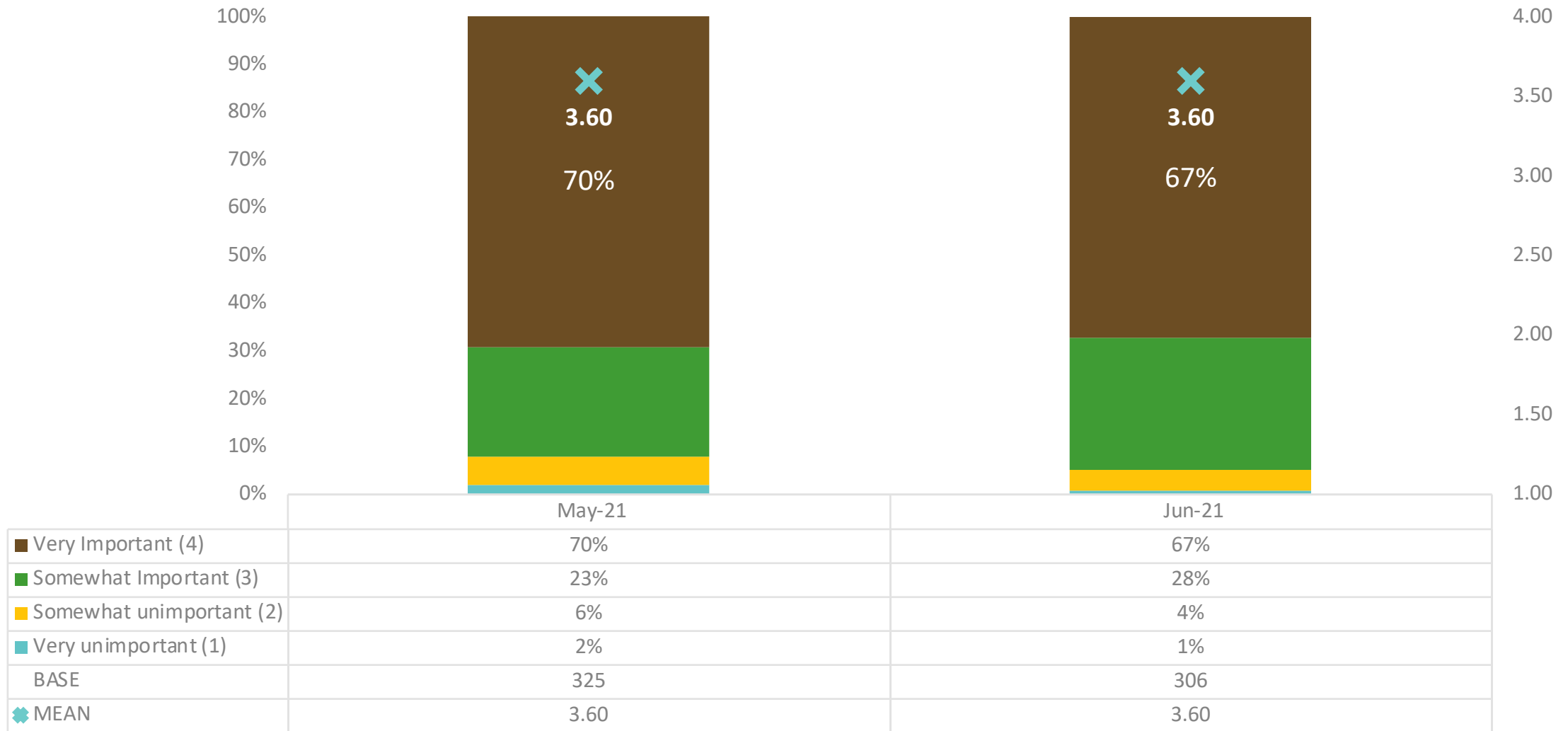


Q: When considering an international destination for travel post-COVID-19, how important are each of the following to you in selecting a destination to visit?



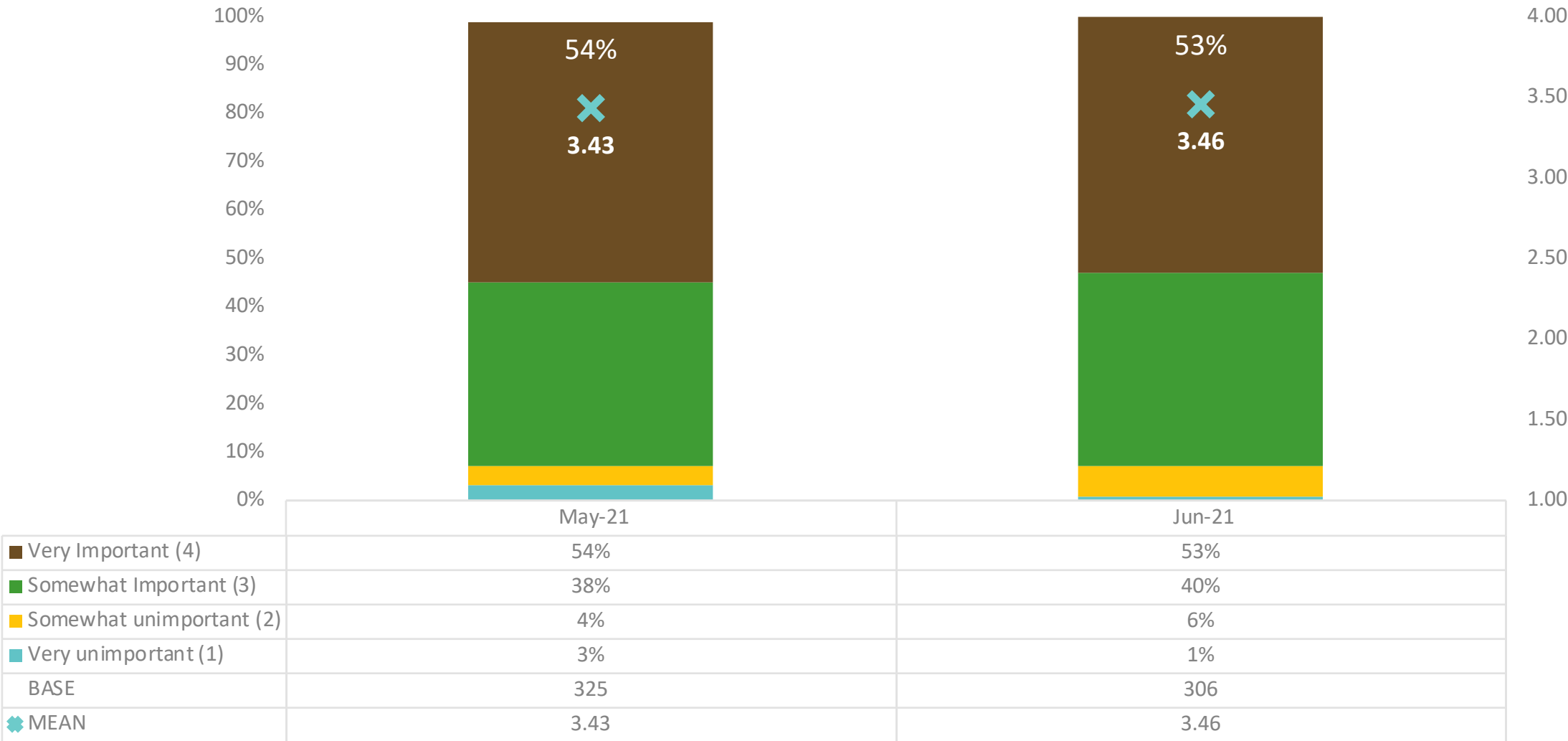
POST-COVID SELECTION FACTOR

Low rates of COVID-19



POST-COVID SELECTION FACTOR

Advanced hygiene measures

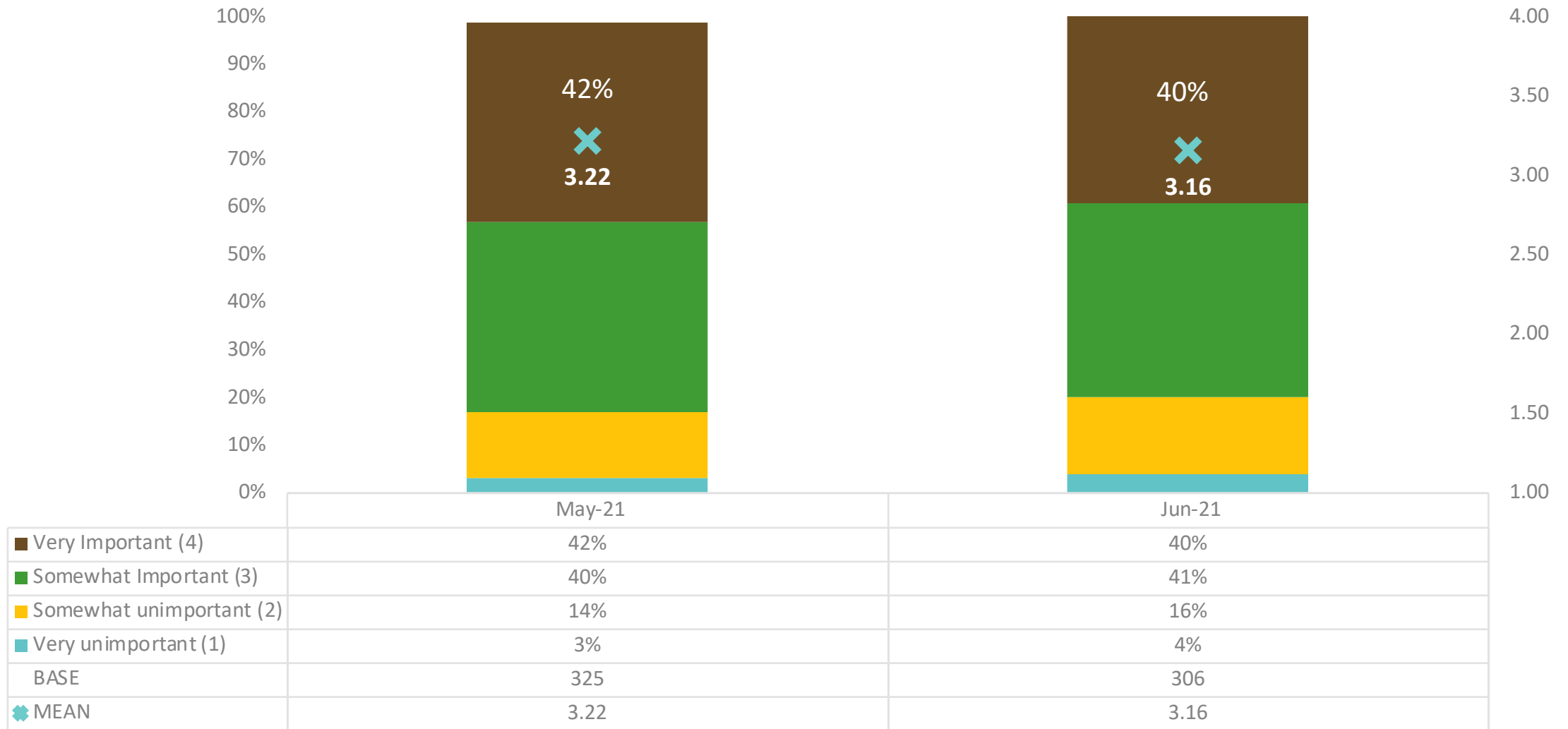


Q: When considering an international destination for travel post-COVID-19, how important are each of the following To you in selecting a destination to visit?



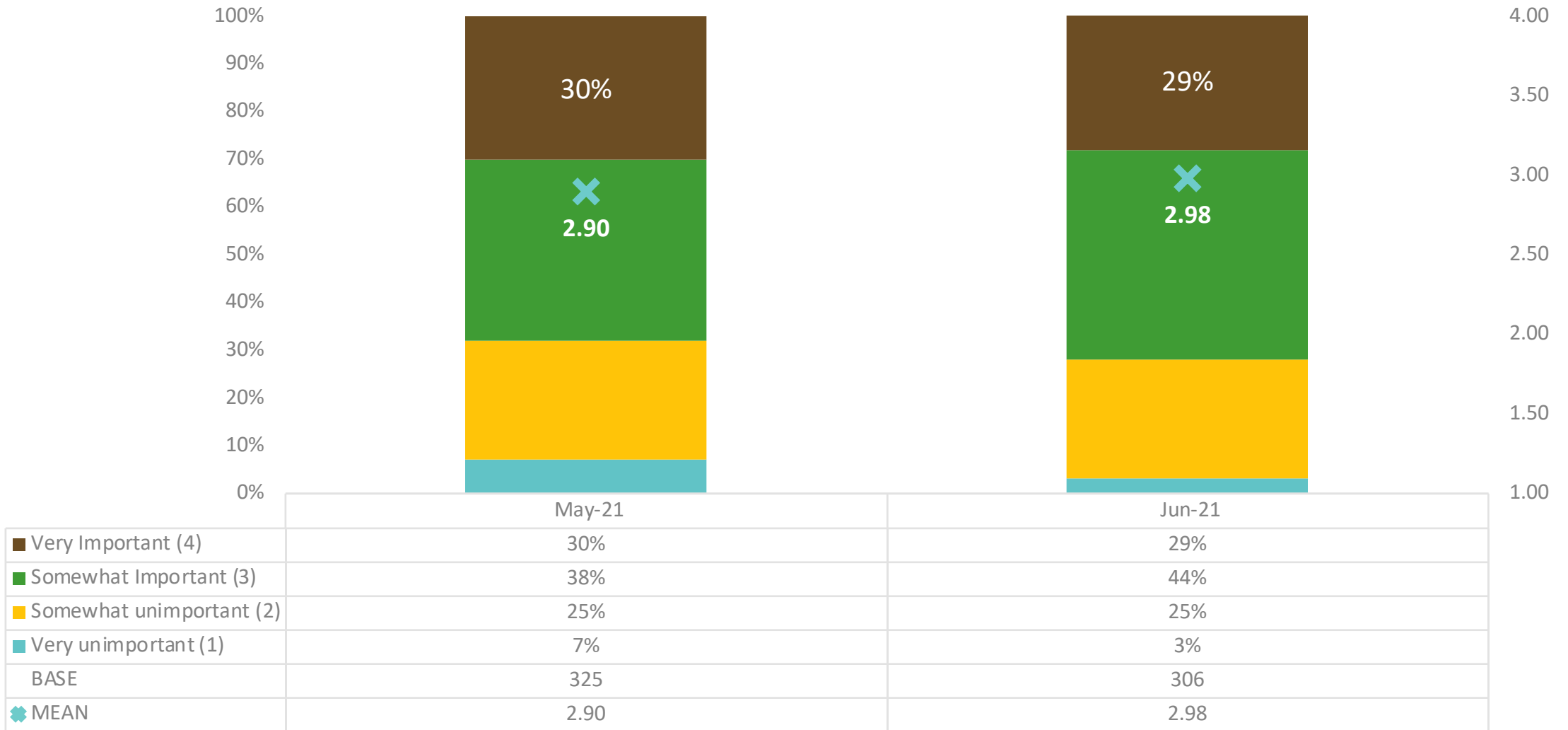
POST-COVID SELECTION FACTOR

COVID-19 vaccine required for all visitors



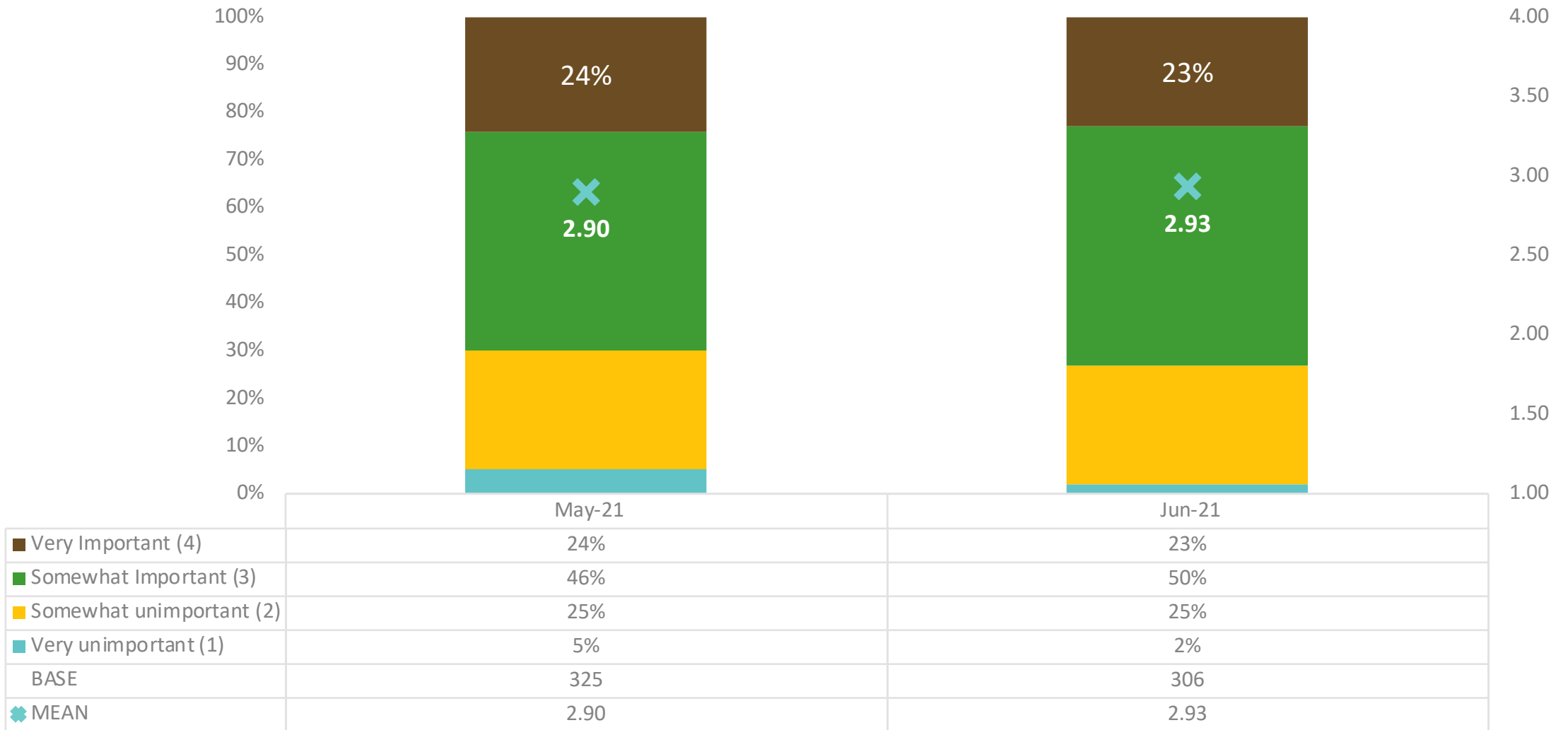
POST-COVID SELECTION FACTOR

No quarantine for visitors w/ negative COVID-19 test results



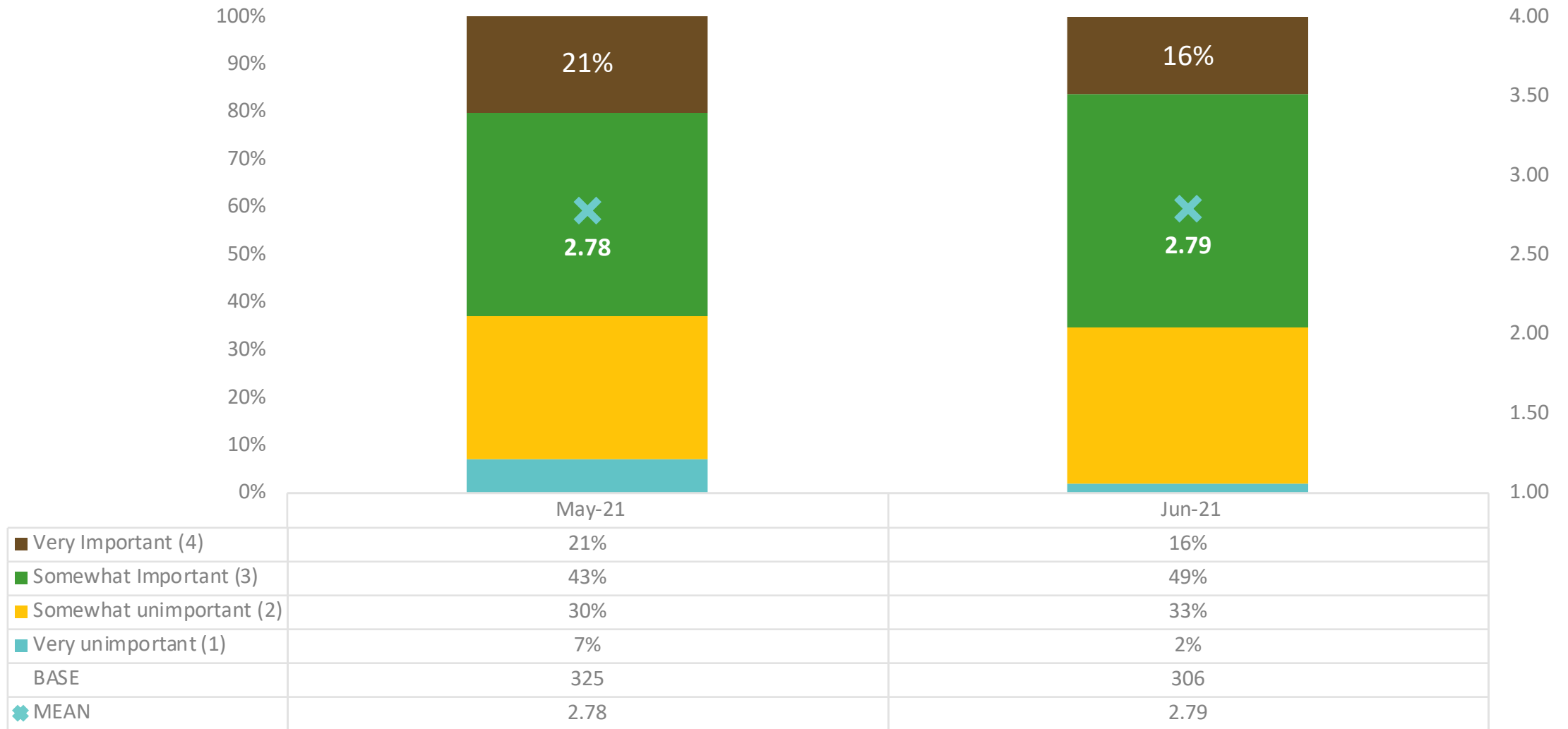
POST-COVID SELECTION FACTOR

Rural/ natural open areas



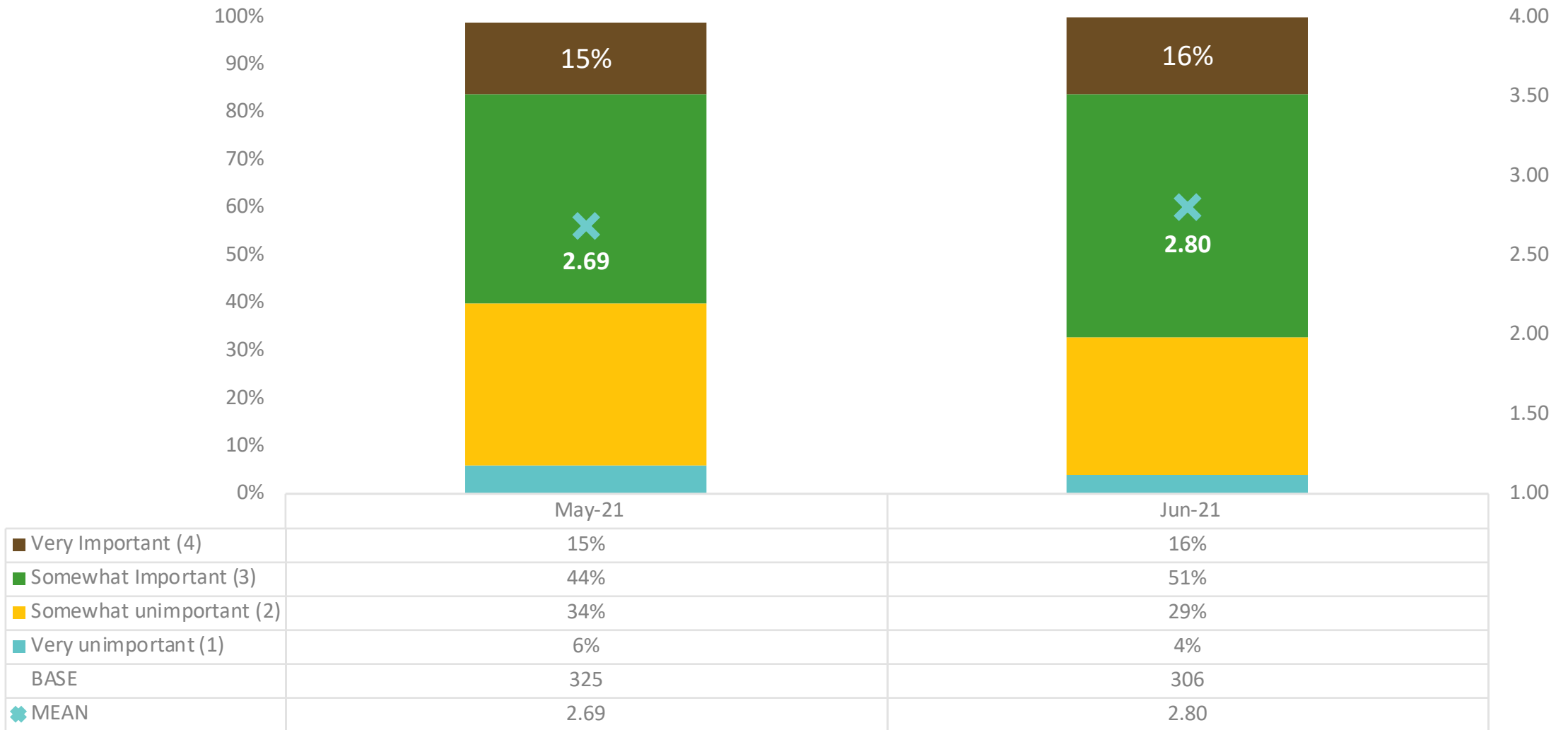
POST-COVID SELECTION FACTOR

Relatively low population density



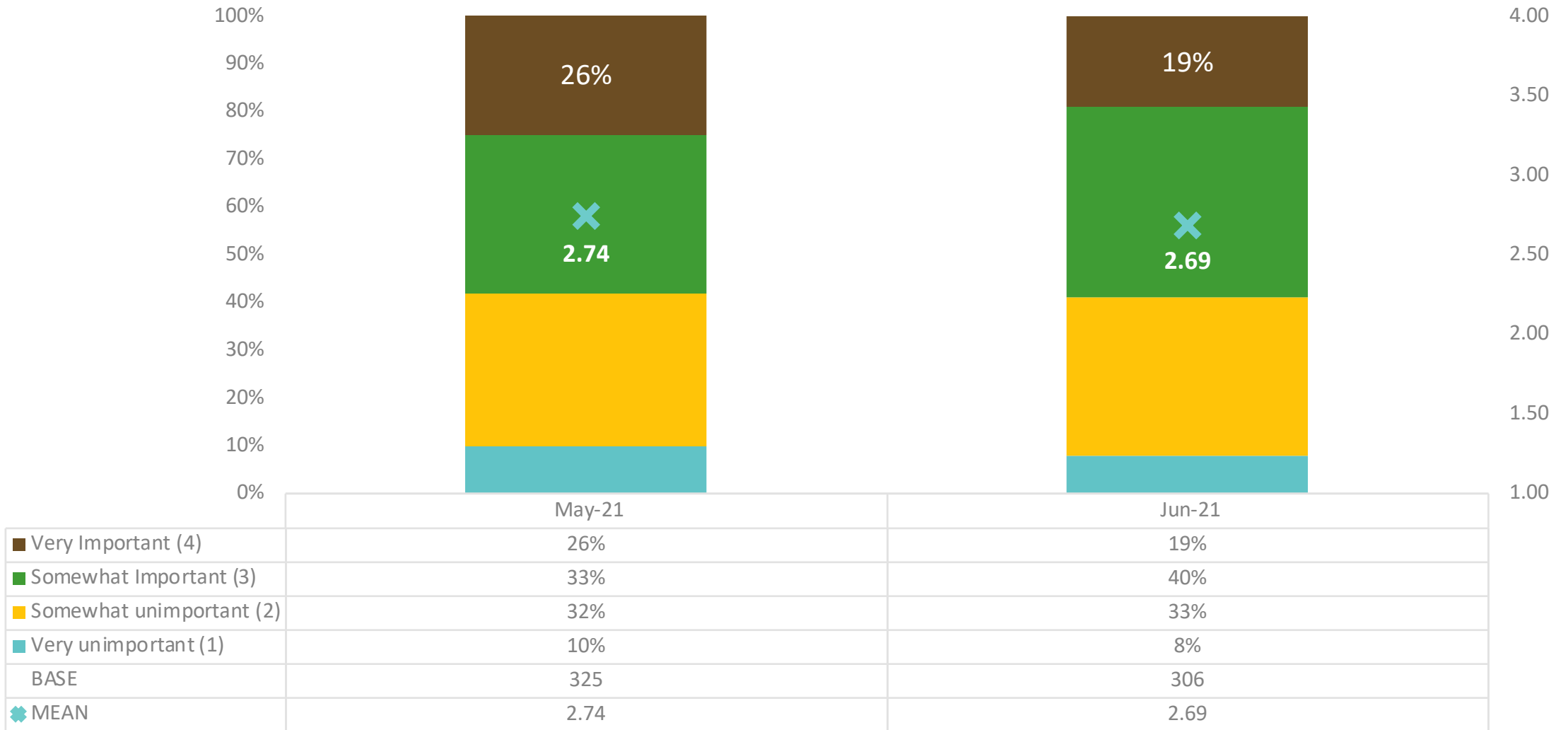
POST-COVID SELECTION FACTOR

Secondary cities of interest

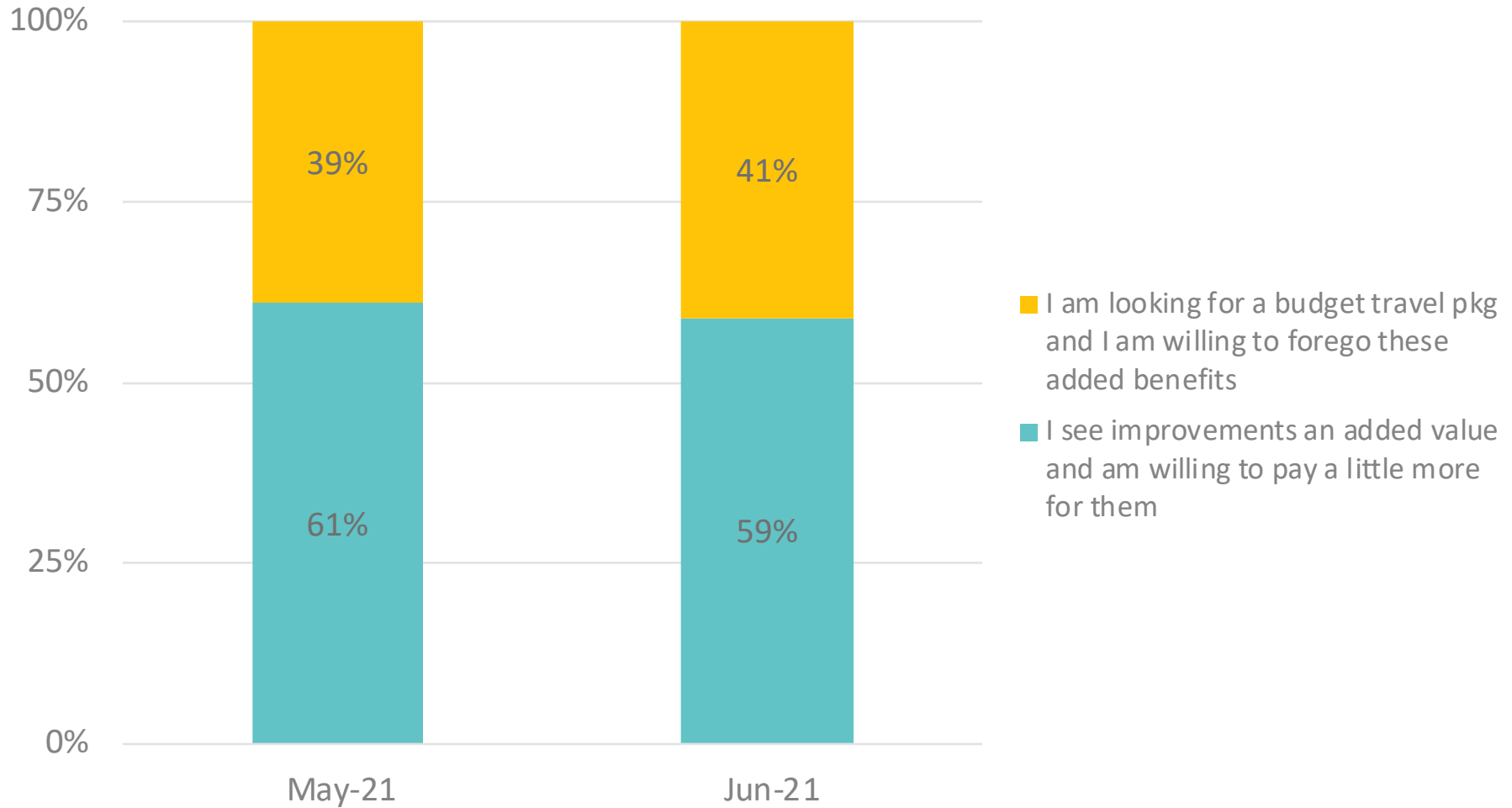


POST-COVID SELECTION FACTOR

No quarantine of any kind for visitors



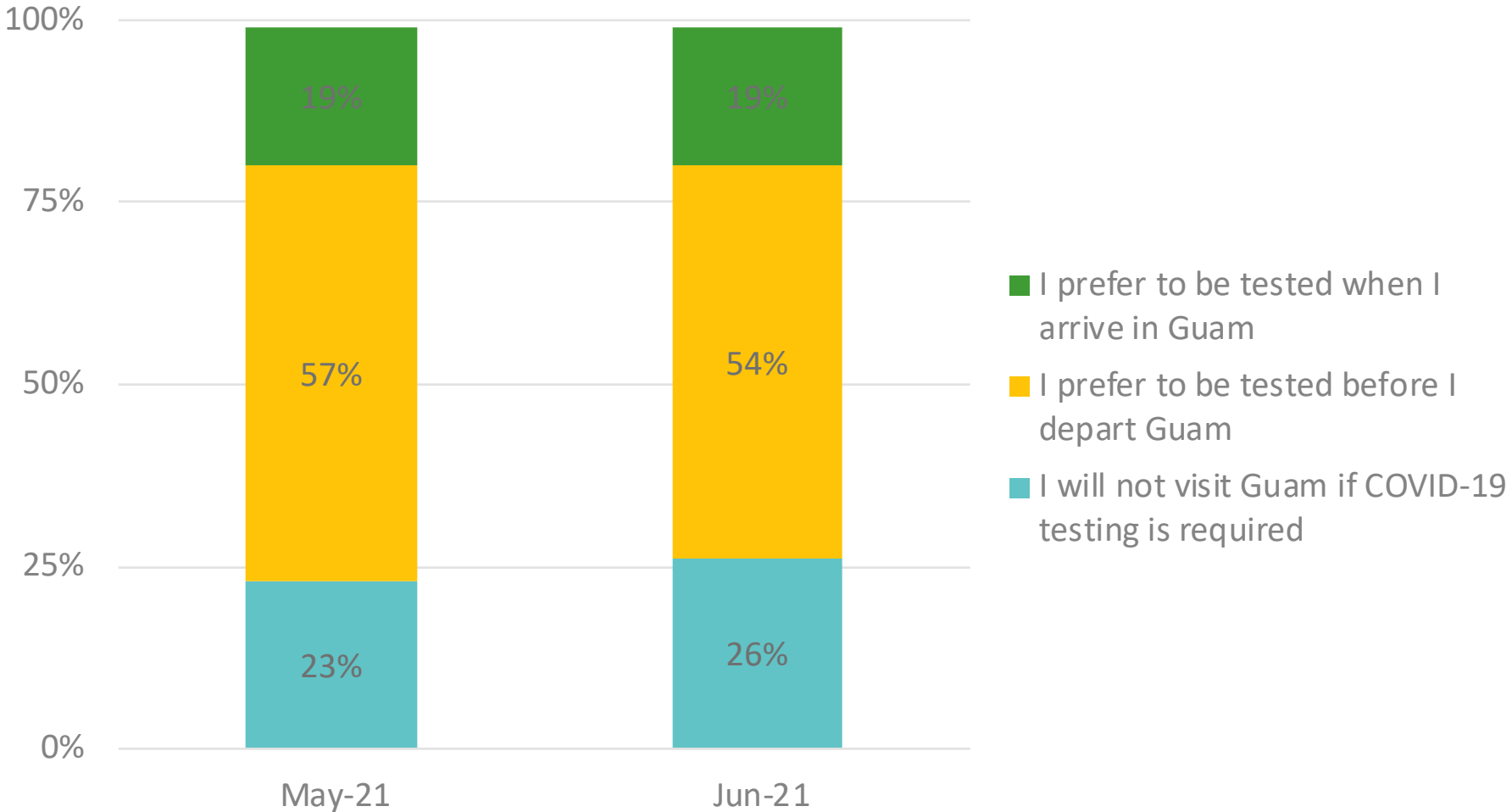
GUAM AIRPORT COVID-19 SAFETY MEASURES



Q: In light of the COVID-19 pandemic, Guam has plans to implement numerous safety measures at the airport, including Digital/ touchless experience using kiosks and QR codes for the customers and border protection/ ESTA process. Which of the following best describes your reaction to these improvements?



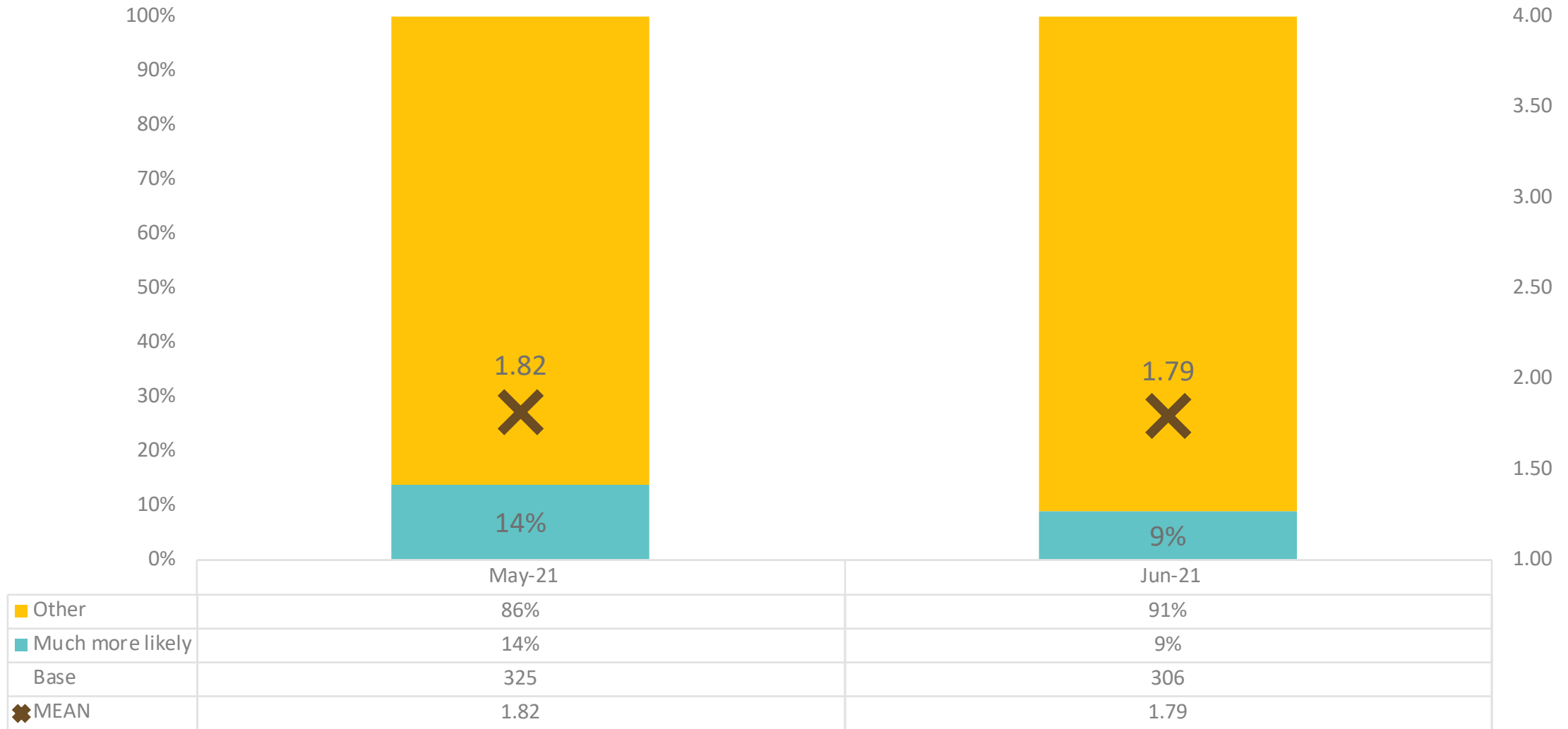
ON-ISLE COVID-19 TESTING PREFERENCE



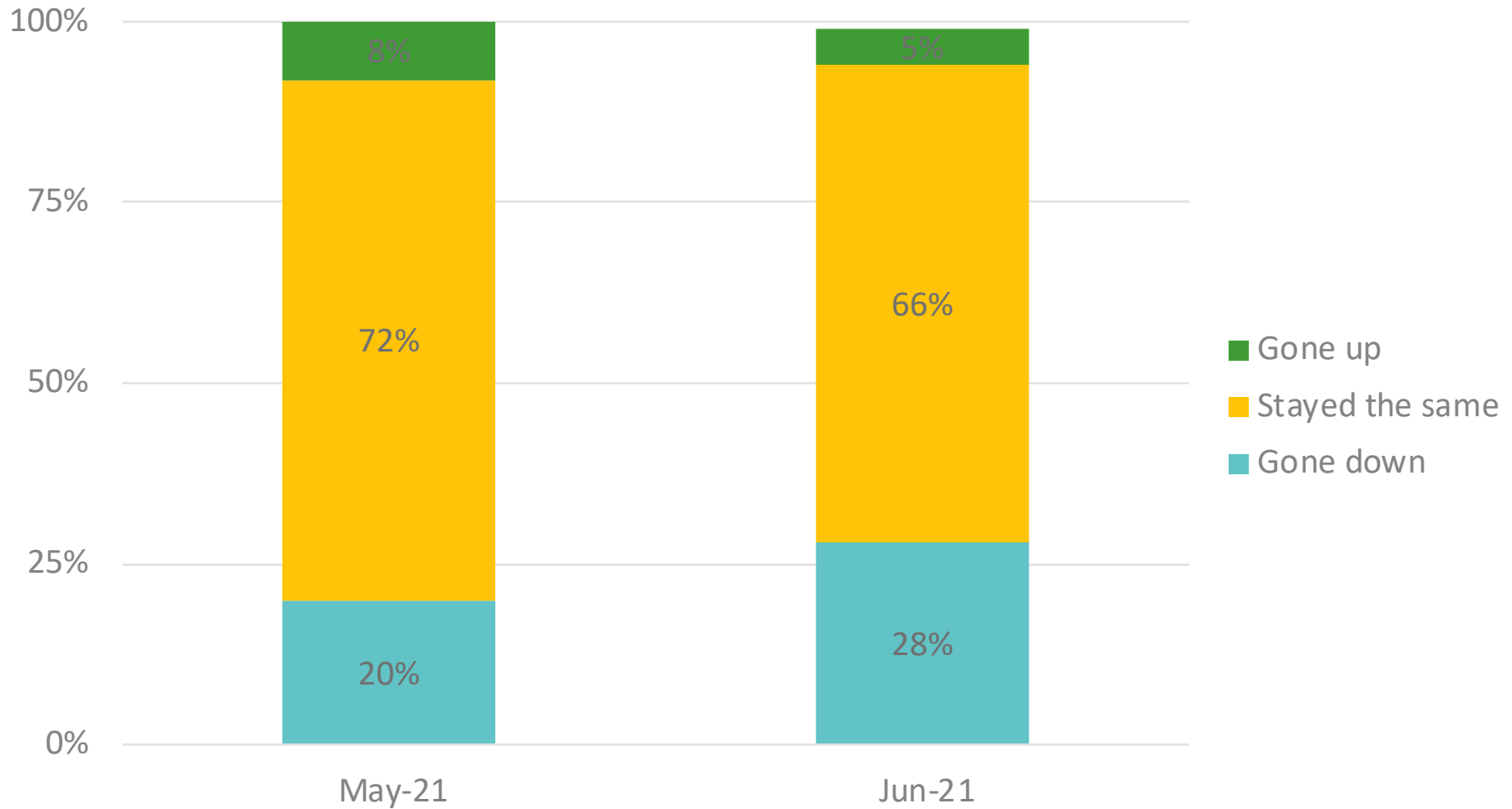
Q: If Guam were to require visitors to pay for COVID-19 testing on island, either upon arrival or before leaving, which would you prefer?



IMPACT ON TRAVEL – FDA APPROVED COVID TEST



CHANGES IN HOUSEHOLD INCOME DURING PANDEMIC



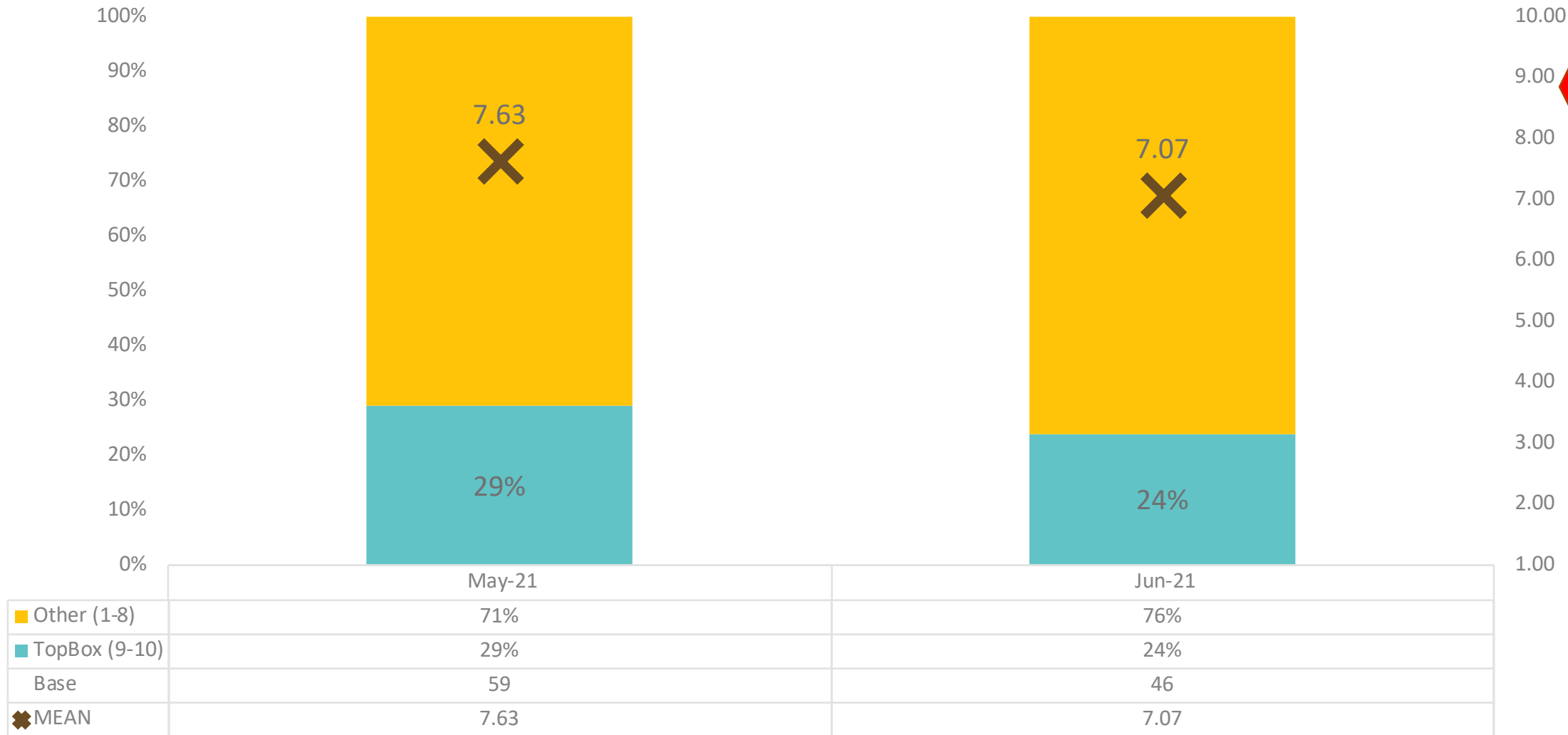


SECTION 3

VISITOR SATISFACTION



OVERALL SATISFACTION – 10PT SCALE



PRIMARY TRAVEL MOTIVATION

	May 2021	June 2021
BASE	59	46
Vacation/ pleasure	76%	78%
Honeymoon	7%	11%
Get married/ attend wedding	7%	-
Organized sporting activity/ event	3%	2%
Incentive trip	-	7%
Business/ conference/ convention/ trade show	3%	2%
Visit friends/ family	3%	-

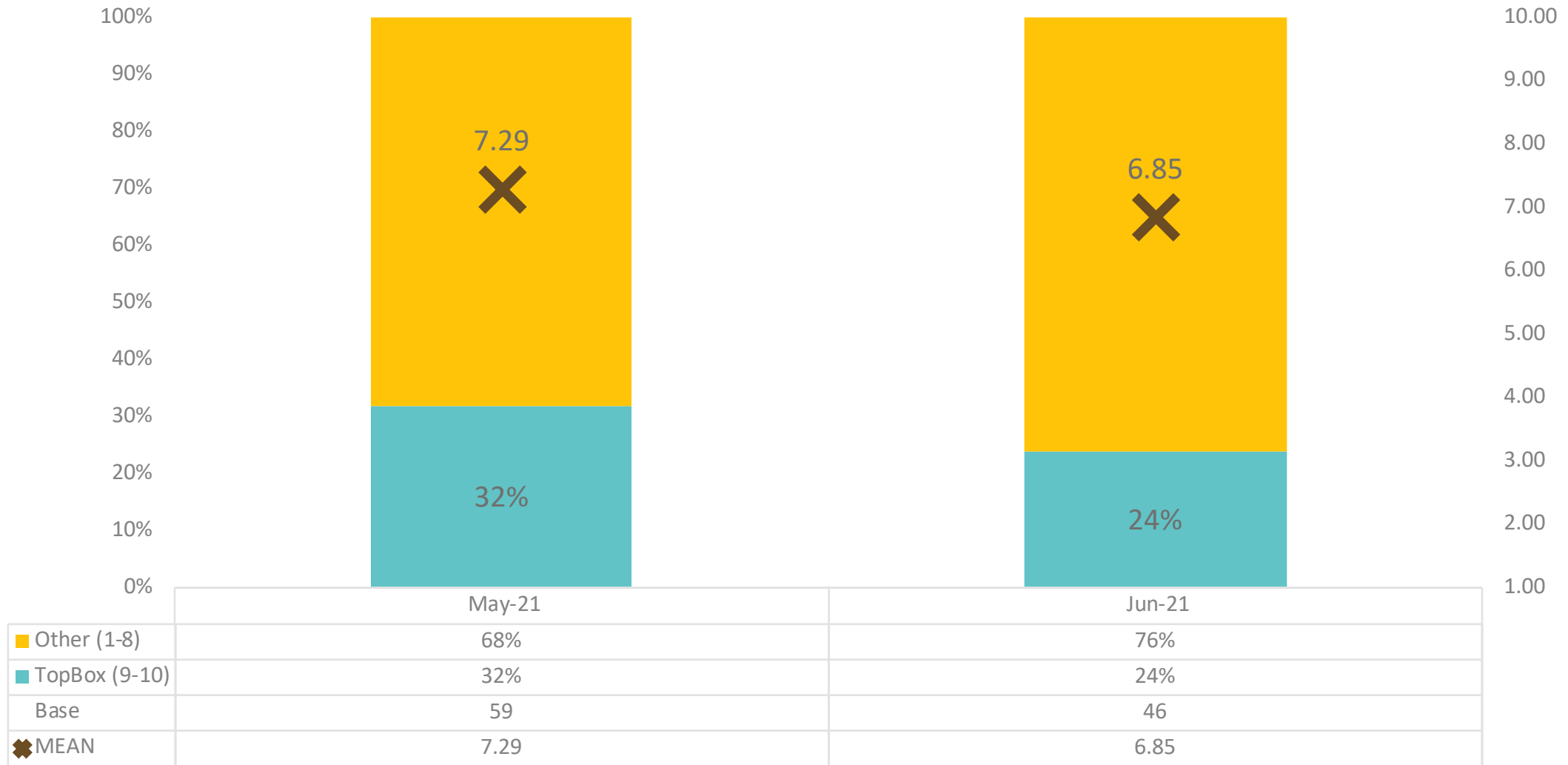


TRAVEL MOTIVATIONS – TOP 3

	May 2021	June 2021
BASE	59	46
Beautiful seas, beaches, tropical climate	56%	48%
Short travel time	37%	28%
Safety	37%	28%
Price	25%	35%
Prior trip	25%	26%
Sightseeing/ tourist spots	14%	13%
Shopping	14%	13%
Water sports	7%	20%
Relaxation	10%	13%



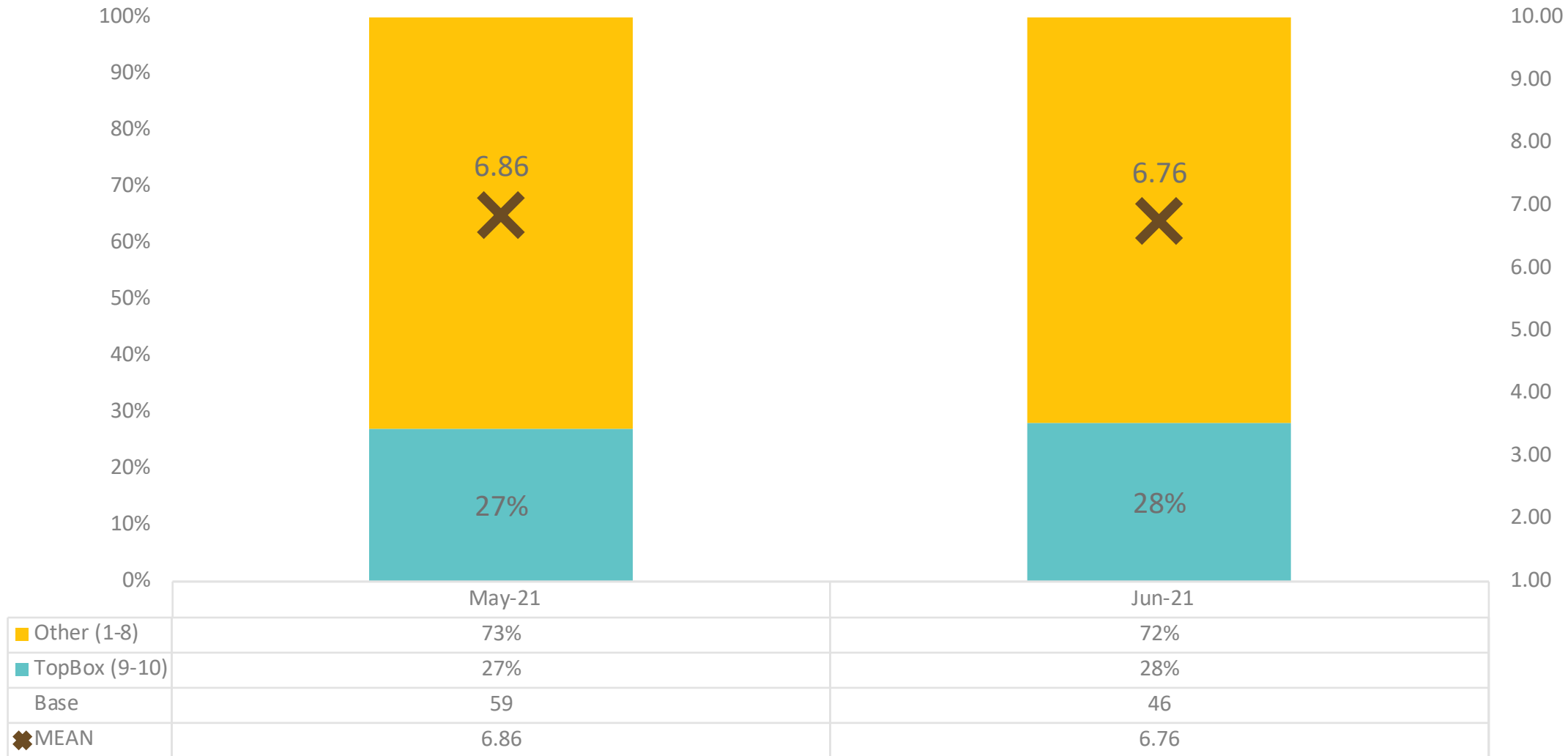
BRAND ADVOCACY – 10PT SCALE



Caution
small
base



BRAND LOYALTY – 10PT SCALE



Caution
small
base

GUAM TRAVELER – TRIP MOTIVATIONS

	May 2021	June 2021
BASE	58	45
<i>Nature/ natural beauty/ scenery</i>	50%	31%
<i>Beach/ ocean</i>	48%	31%
<i>Weather/ climate/ good atmosphere/ fresh air</i>	34%	31%
<i>Relaxation</i>	31%	33%
<i>Hotel/ accommodations</i>	33%	22%
<i>Sightseeing</i>	28%	31%
<i>Safe environment</i>	33%	22%
<i>Food – quality/ variety/ service</i>	14%	9%
<i>Local culture/ people/ music</i>	12%	22%
<i>Military/ historical sites</i>	10%	9%
<i>Feeling the Hafa Adai spirit</i>	10%	13%
<i>Shopping</i>	19%	24%
<i>Variety of activities</i>	14%	18%
<i>Overall customer service</i>	17%	13%



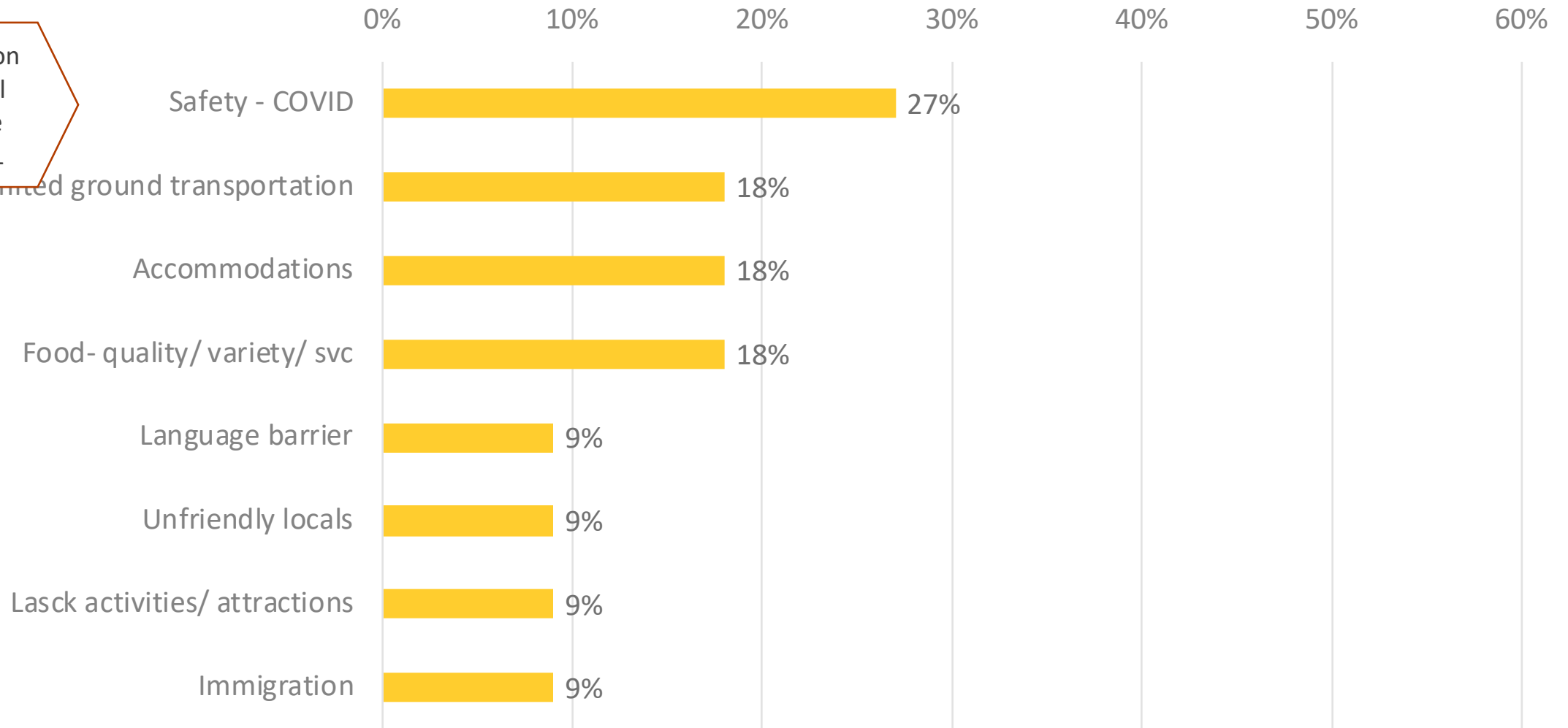
GUAM TRAVELERS – DRAWBACKS

	May 2021	June 2021
BASE	59	46
<i>No negatives</i>	46%	35%
<i>Expensive</i>	19%	17%
<i>Ground transportation – limited options</i>	14%	22%
<i>Health/ Safety/ COVID</i>	12%	15%
<i>Immigration</i>	5%	15%
<i>Traffic</i>	10%	7%
<i>Language barrier</i>	8%	9%
<i>Food – quality/ variety/ service</i>	7%	9%
<i>Customer service</i>	3%	9%
<i>Lack of activities/ attractions</i>	2%	4%
<i>Safety</i>	3%	2%
<i>Unfriendly locals</i>	2%	2%



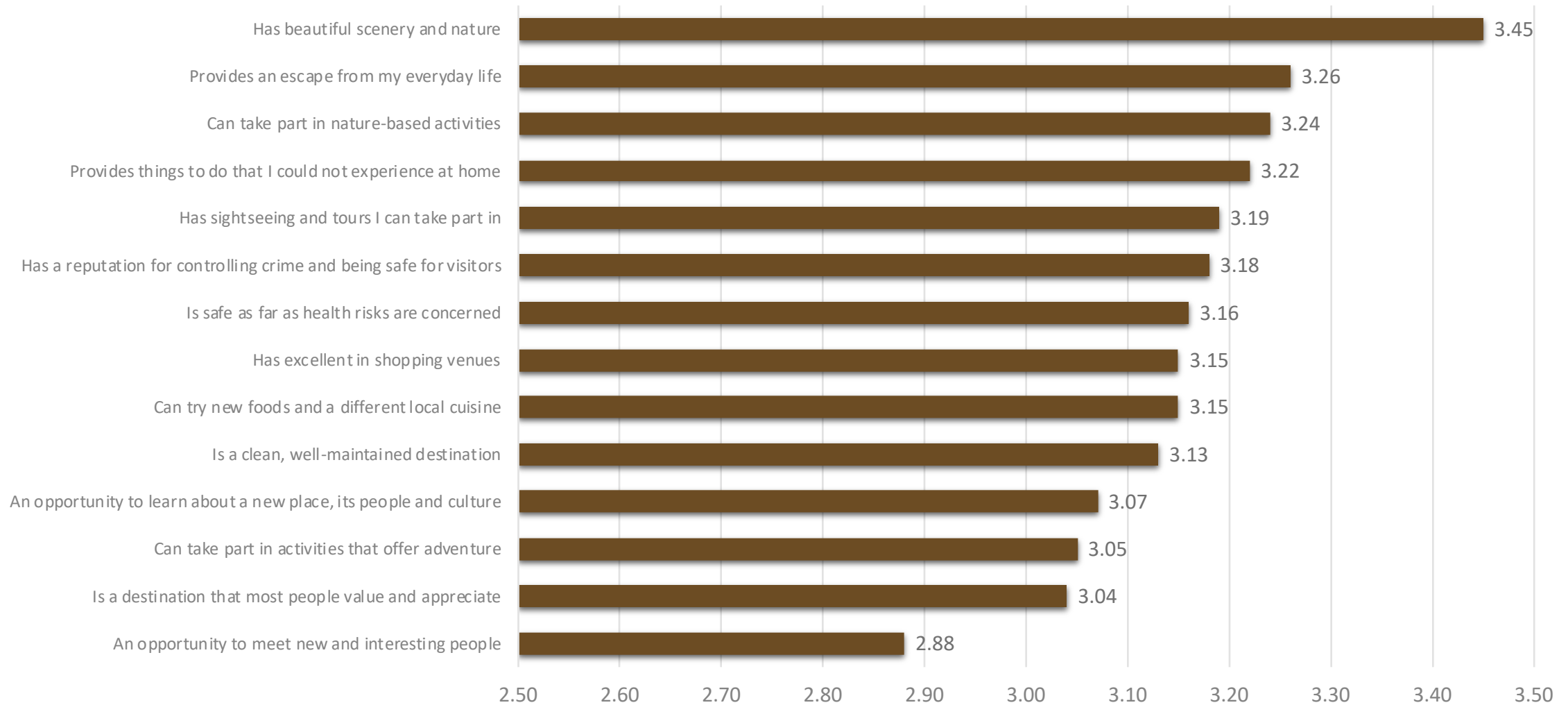
UNLIKELY TO RETURN – REASONS

Caution
small
base
n=11

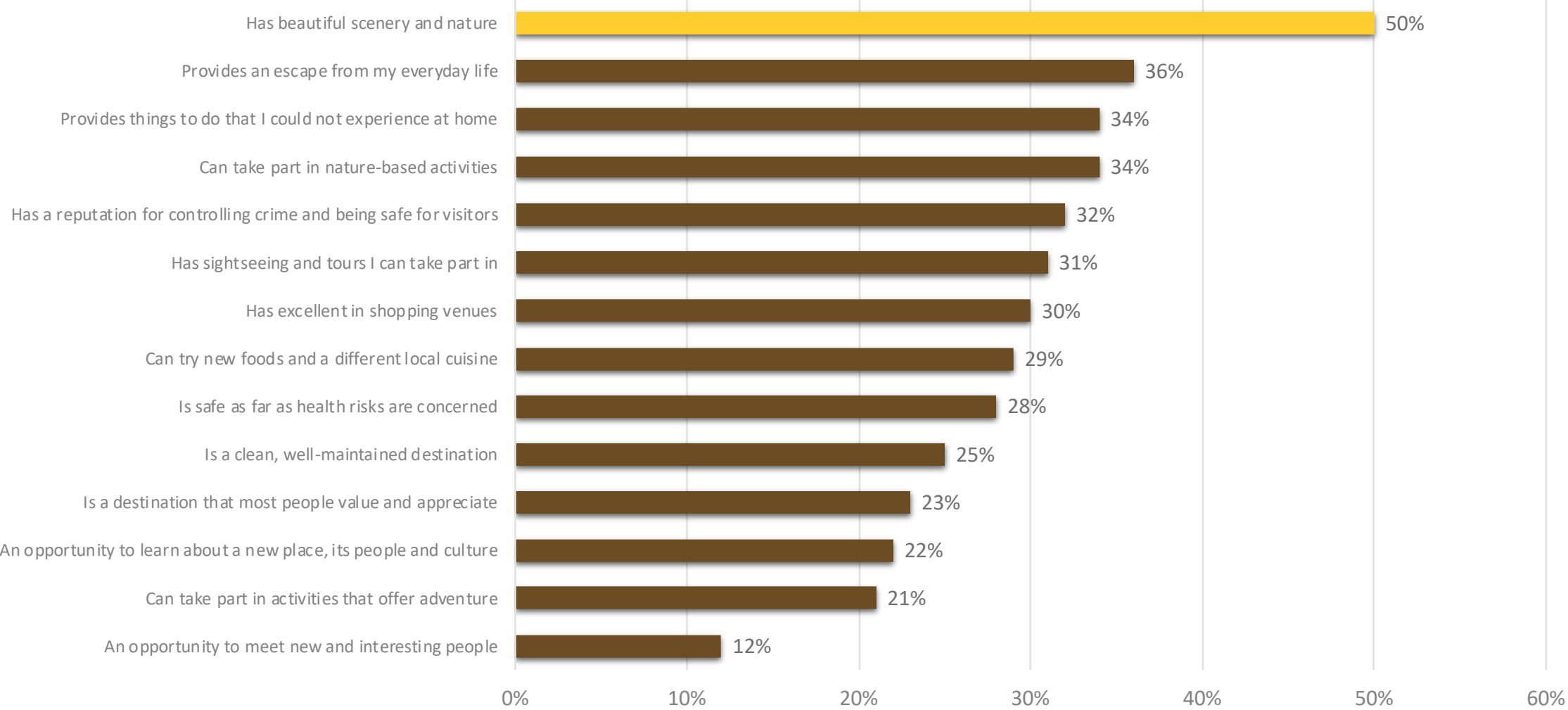


SELECTION FACTORS – SATISFACTION

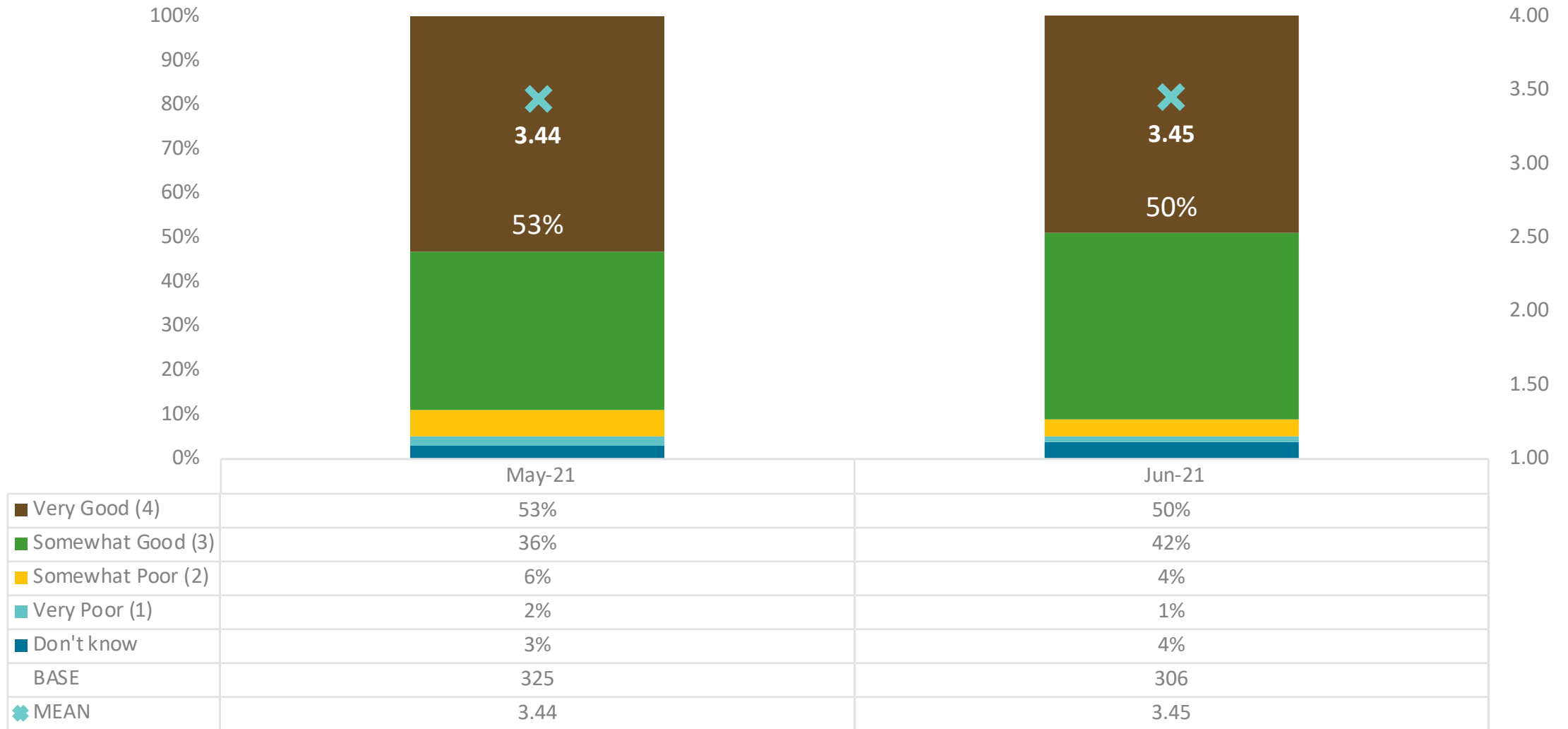
MEAN SCORES 4PT SCALE



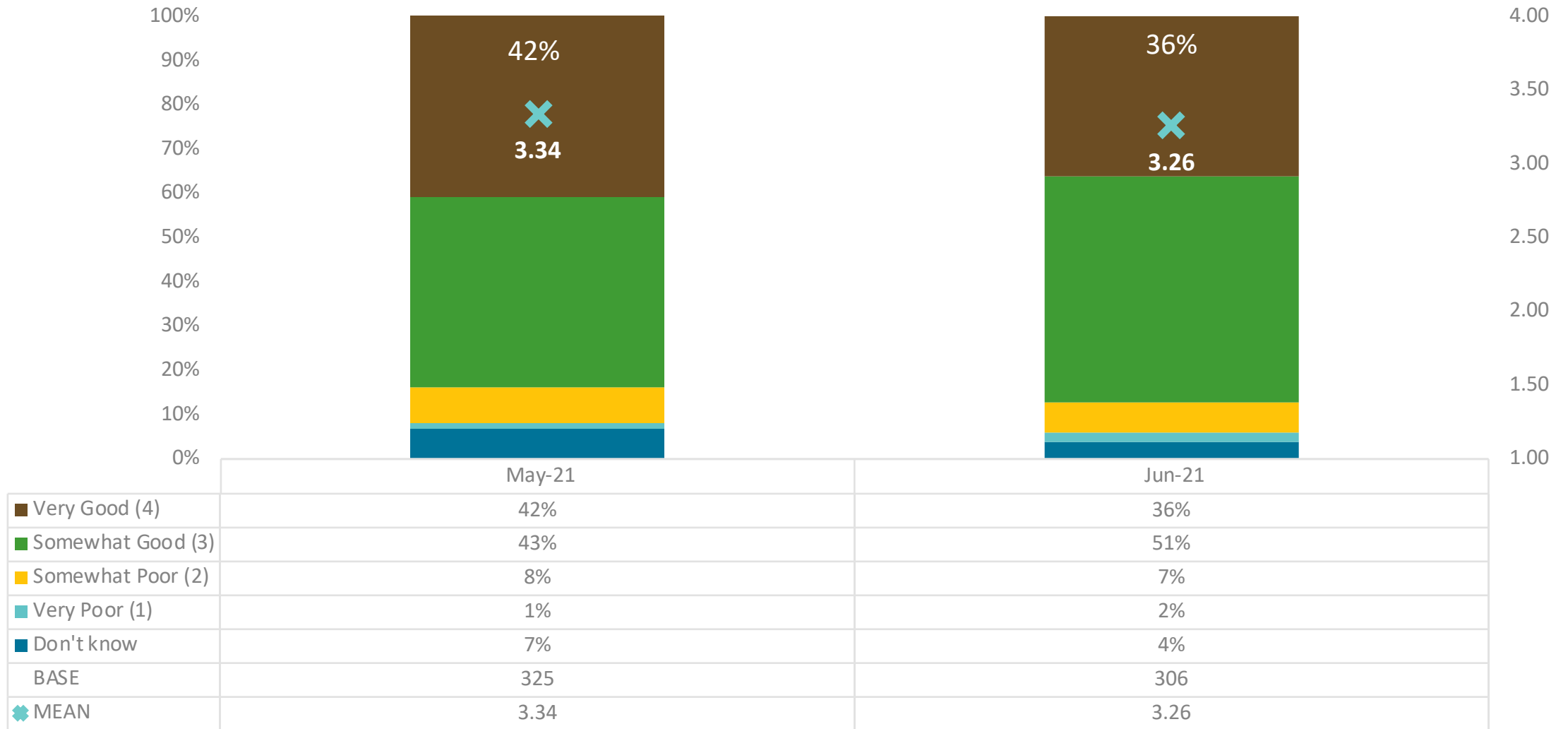
SELECTION FACTORS – SATISFACTION TOP BOX (VERY GOOD)



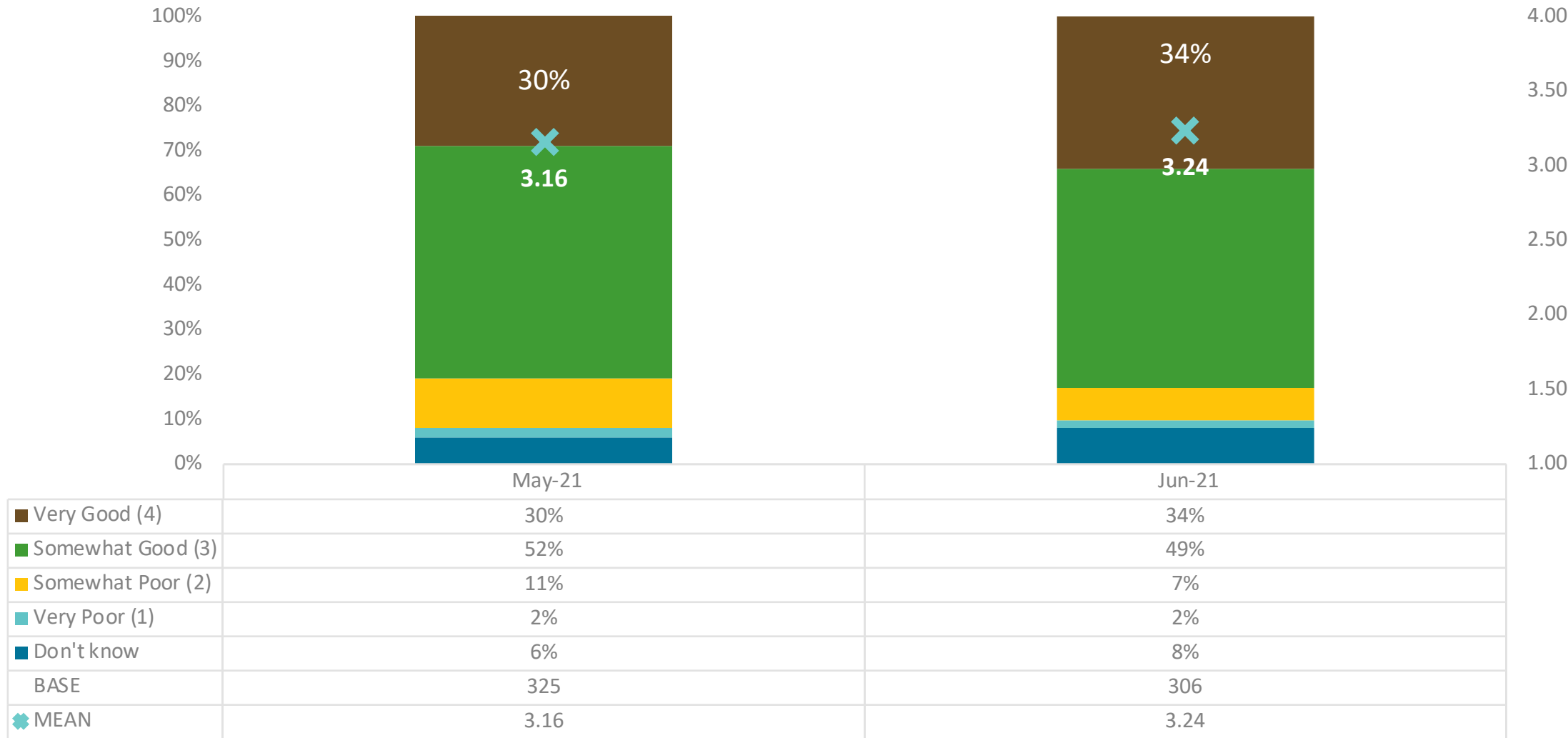
Has beautiful scenery and nature



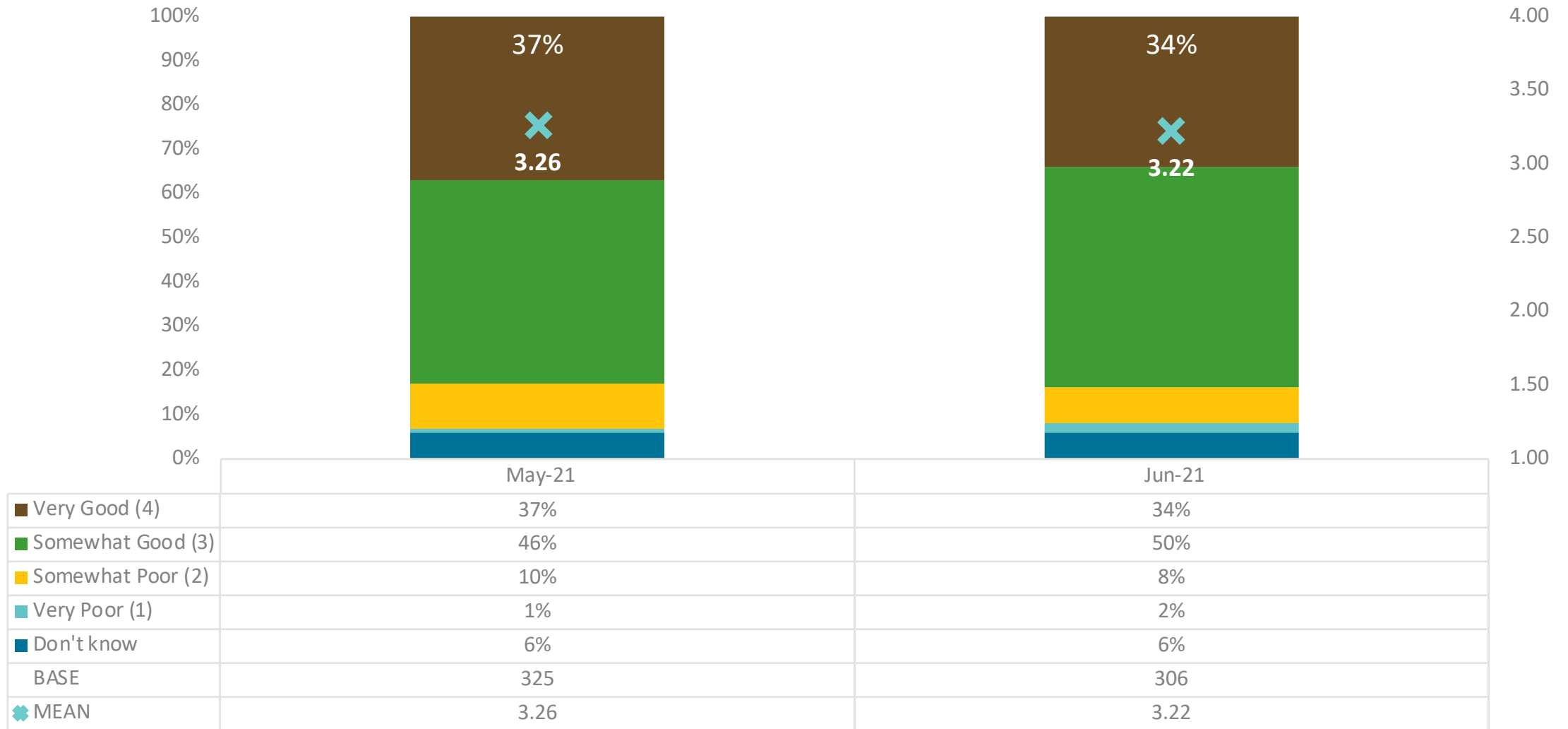
Provides an escape from my everyday life



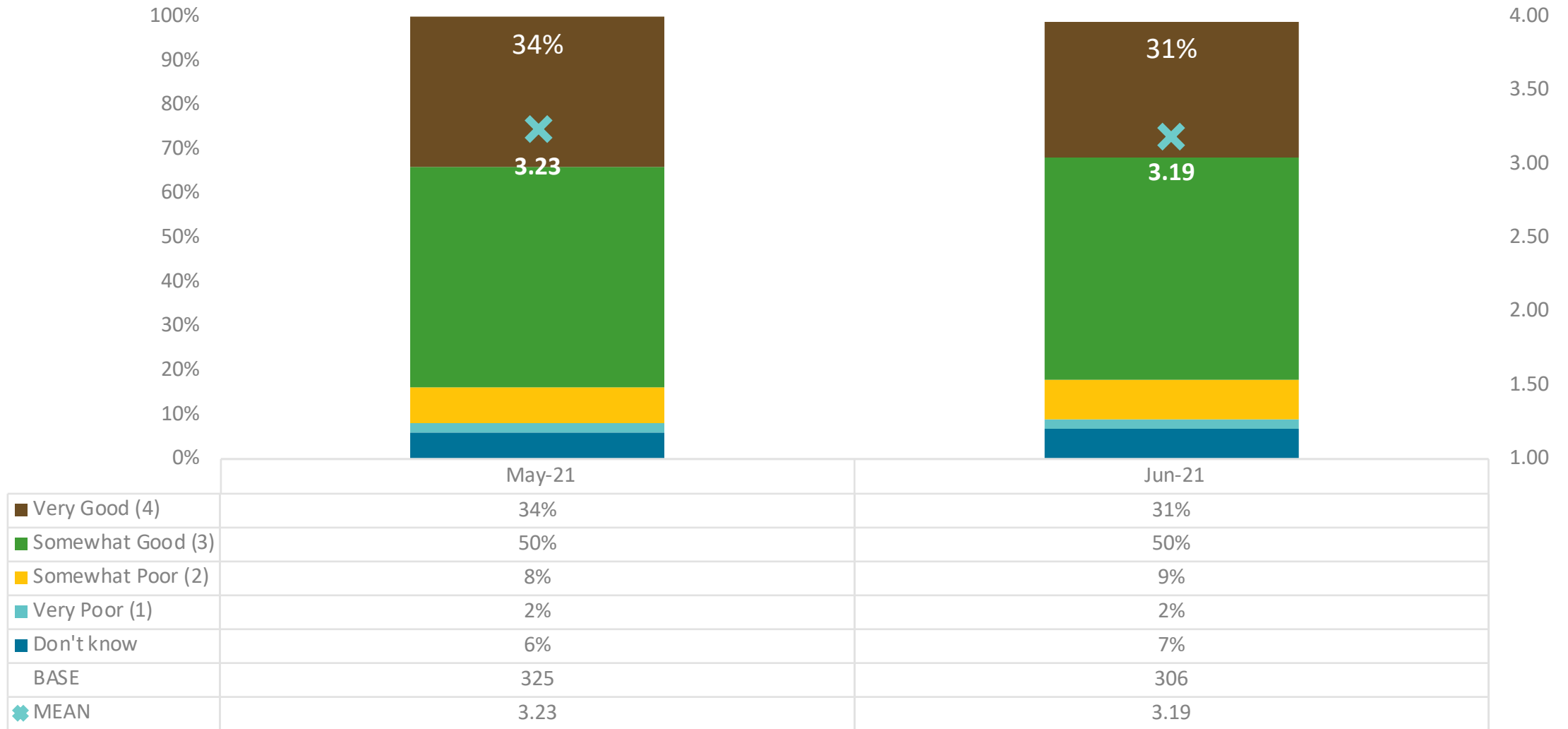
Can take part in nature-based activities



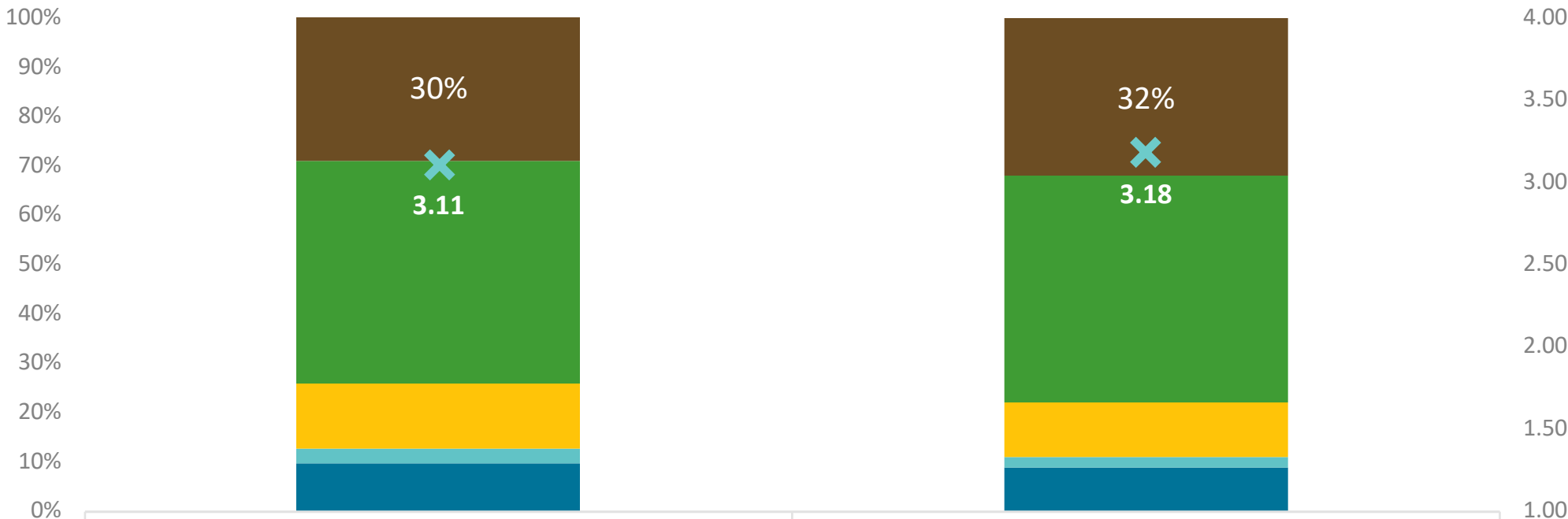
Provides things to do that I could not experience at home



Has sightseeing and tours I can take part in



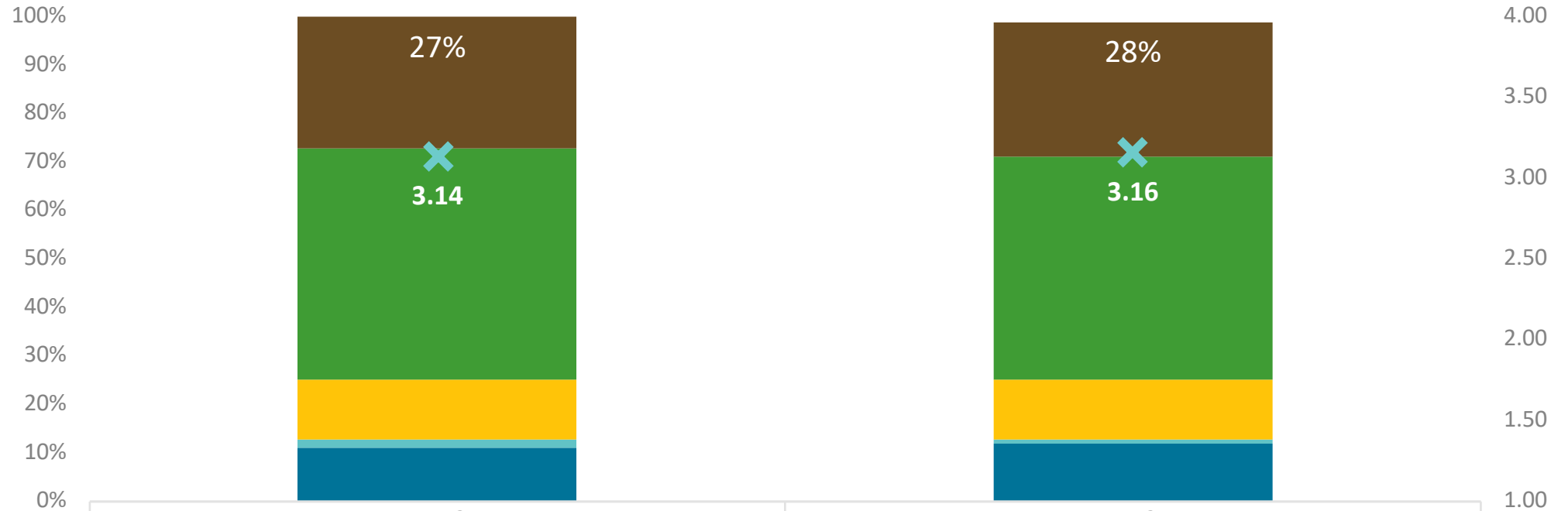
Has a reputation for controlling crime and being safe for visitors



	May-21	Jun-21
Very Good (4)	30%	32%
Somewhat Good (3)	45%	46%
Somewhat Poor (2)	13%	11%
Very Poor (1)	3%	2%
Don't know	10%	9%
BASE	325	306
MEAN	3.11	3.18

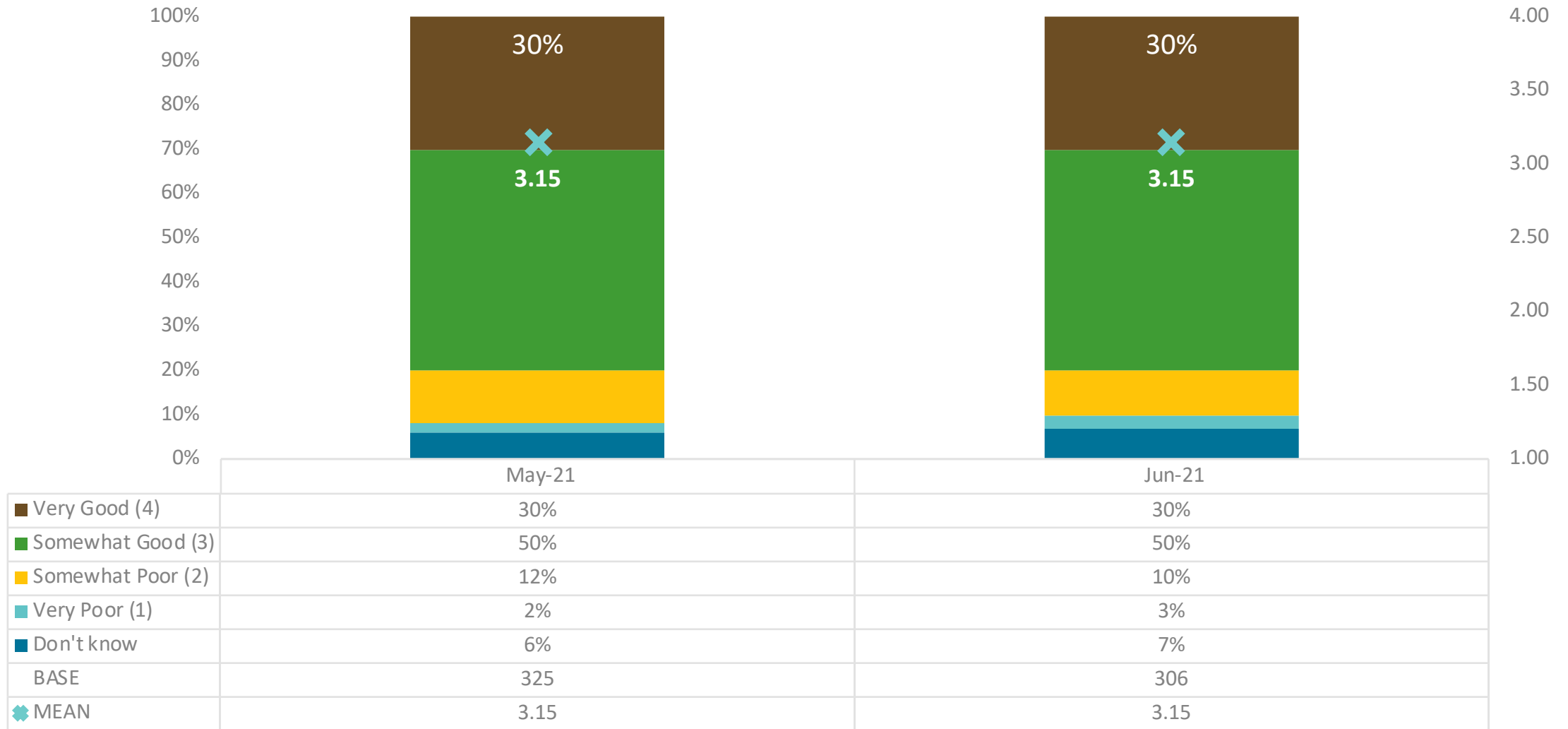


Is safe as far as health risks are concerned



	May-21	Jun-21
Very Good (4)	27%	28%
Somewhat Good (3)	48%	46%
Somewhat Poor (2)	12%	12%
Very Poor (1)	2%	1%
Don't know	11%	12%
BASE	325	306
MEAN	3.14	3.16

Has excellent shopping in venues



Can try new foods and a different local cuisine



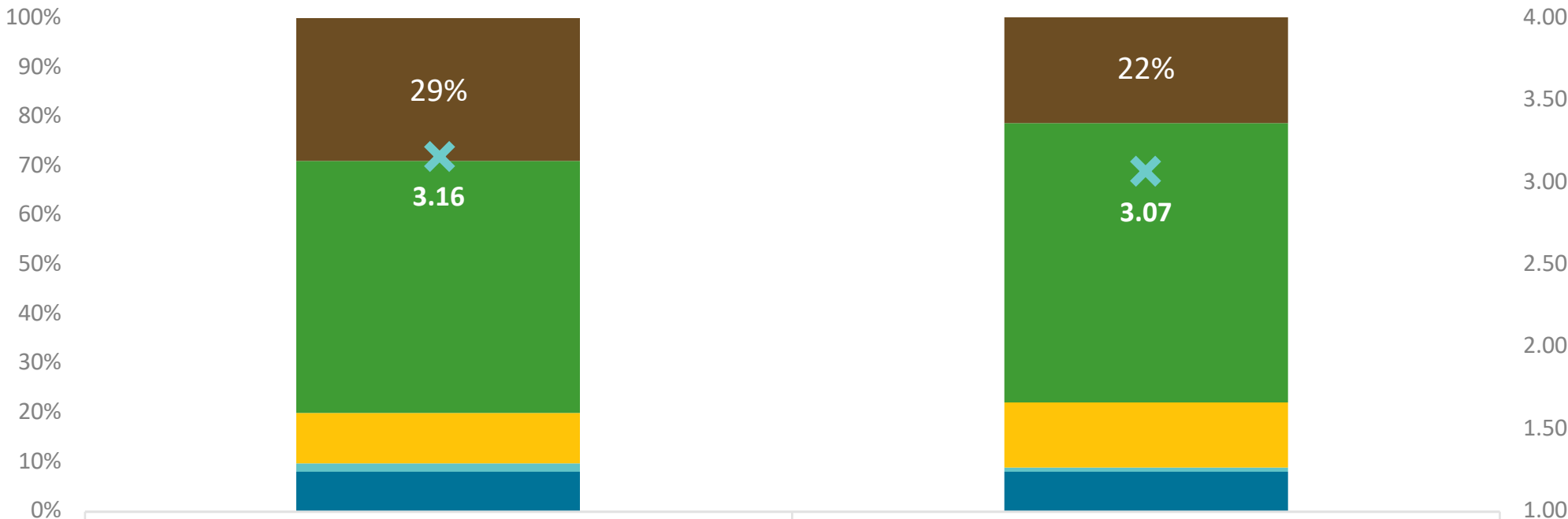
	May-21	Jun-21
Very Good (4)	28%	29%
Somewhat Good (3)	50%	48%
Somewhat Poor (2)	14%	13%
Very Poor (1)	3%	2%
Don't know	6%	8%
BASE	325	306
MEAN	3.09	3.15

Is a clean, well-maintained destination



	May-21	Jun-21
Very Good (4)	27%	25%
Somewhat Good (3)	49%	56%
Somewhat Poor (2)	13%	10%
Very Poor (1)	3%	1%
Don't know	9%	9%
BASE	325	306
MEAN	3.09	3.13

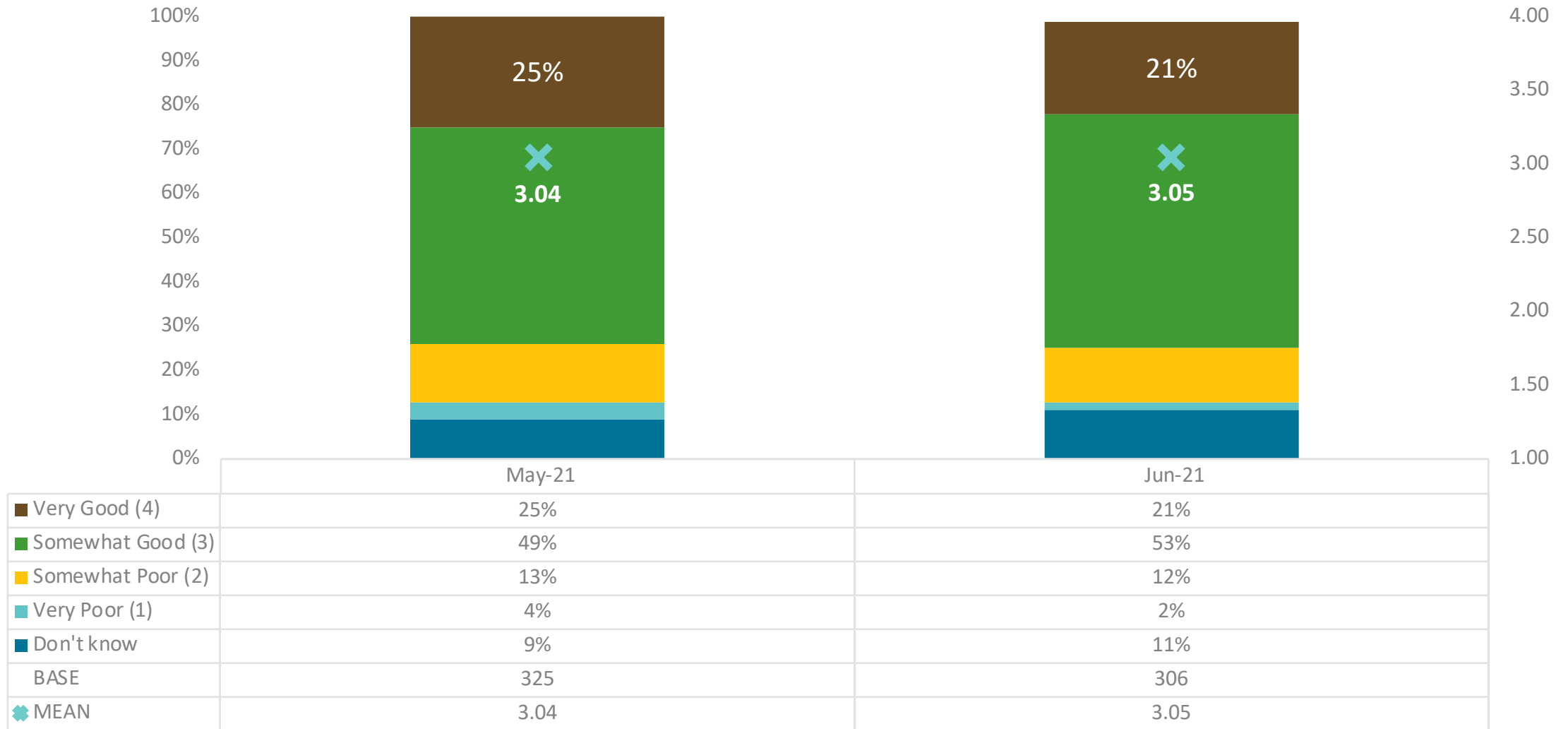
An opportunity to learn about a new place, its people and culture



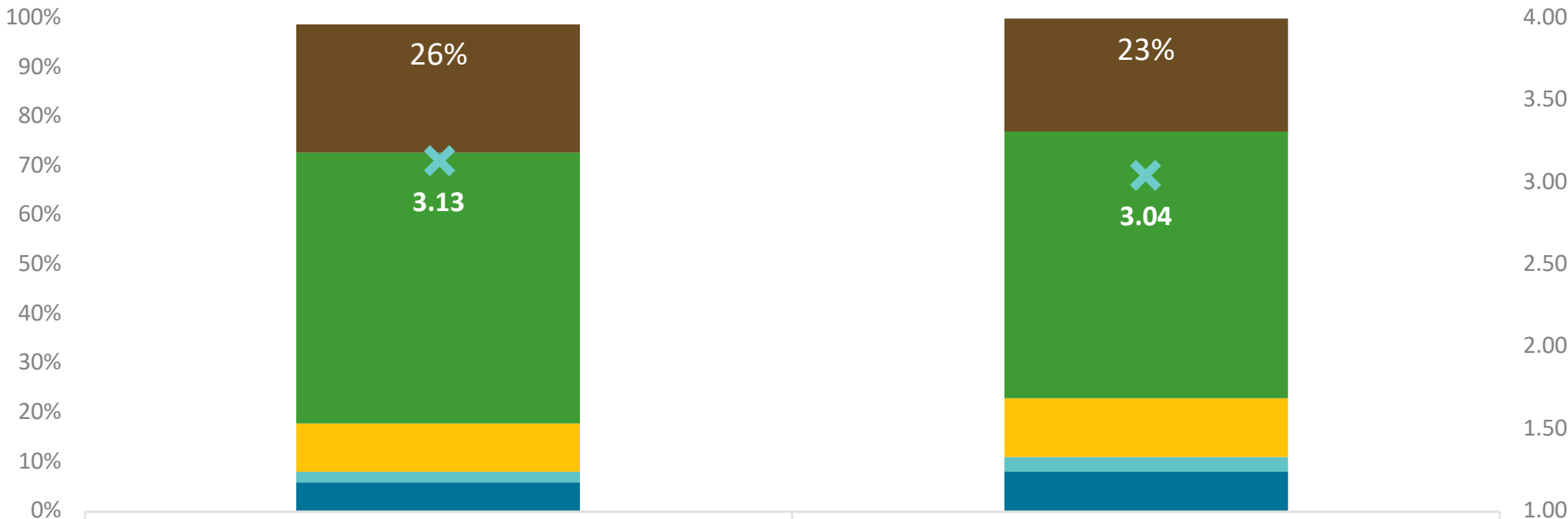
	May-21	Jun-21
Very Good (4)	29%	22%
Somewhat Good (3)	51%	57%
Somewhat Poor (2)	10%	13%
Very Poor (1)	2%	1%
Don't know	8%	8%
BASE	325	306
MEAN	3.16	3.07



Can take part in activities that offer adventure

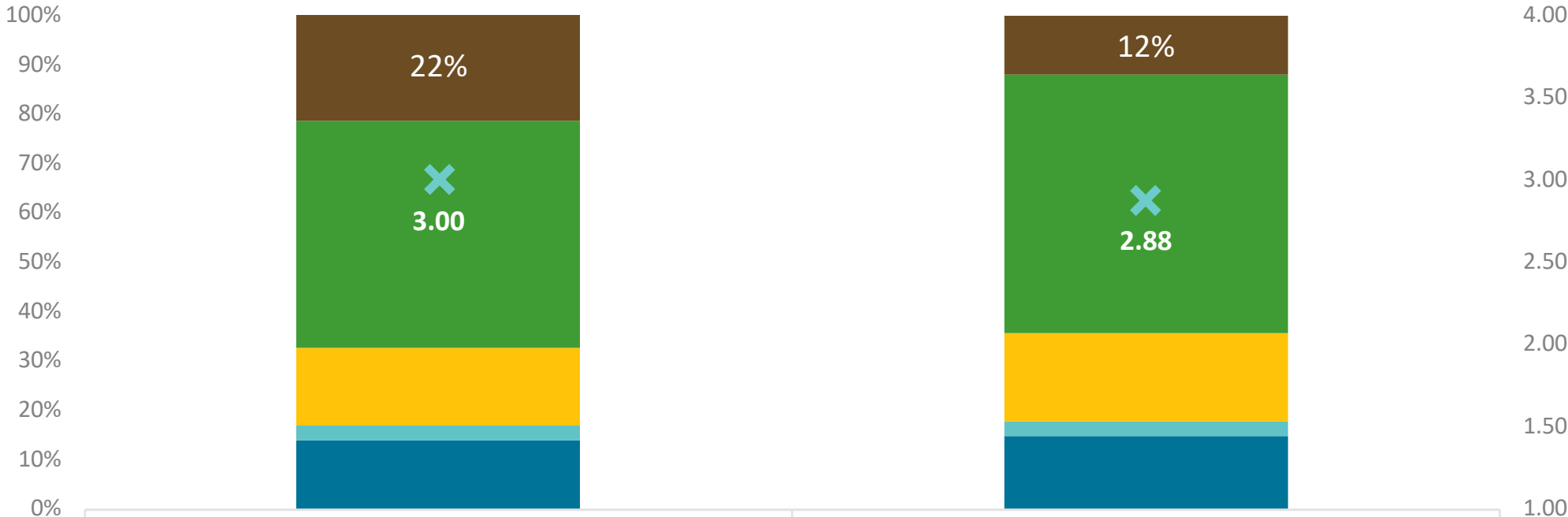


Is a destination that most people value and appreciate



	May-21	Jun-21
Very Good (4)	26%	23%
Somewhat Good (3)	55%	54%
Somewhat Poor (2)	10%	12%
Very Poor (1)	2%	3%
Don't know	6%	8%
BASE	325	306
MEAN	3.13	3.04

An opportunity to meet new and interesting people



	May-21	Jun-21
Very Good (4)	22%	12%
Somewhat Good (3)	46%	52%
Somewhat Poor (2)	16%	18%
Very Poor (1)	3%	3%
Don't know	14%	15%
BASE	325	306
MEAN	3.00	2.88

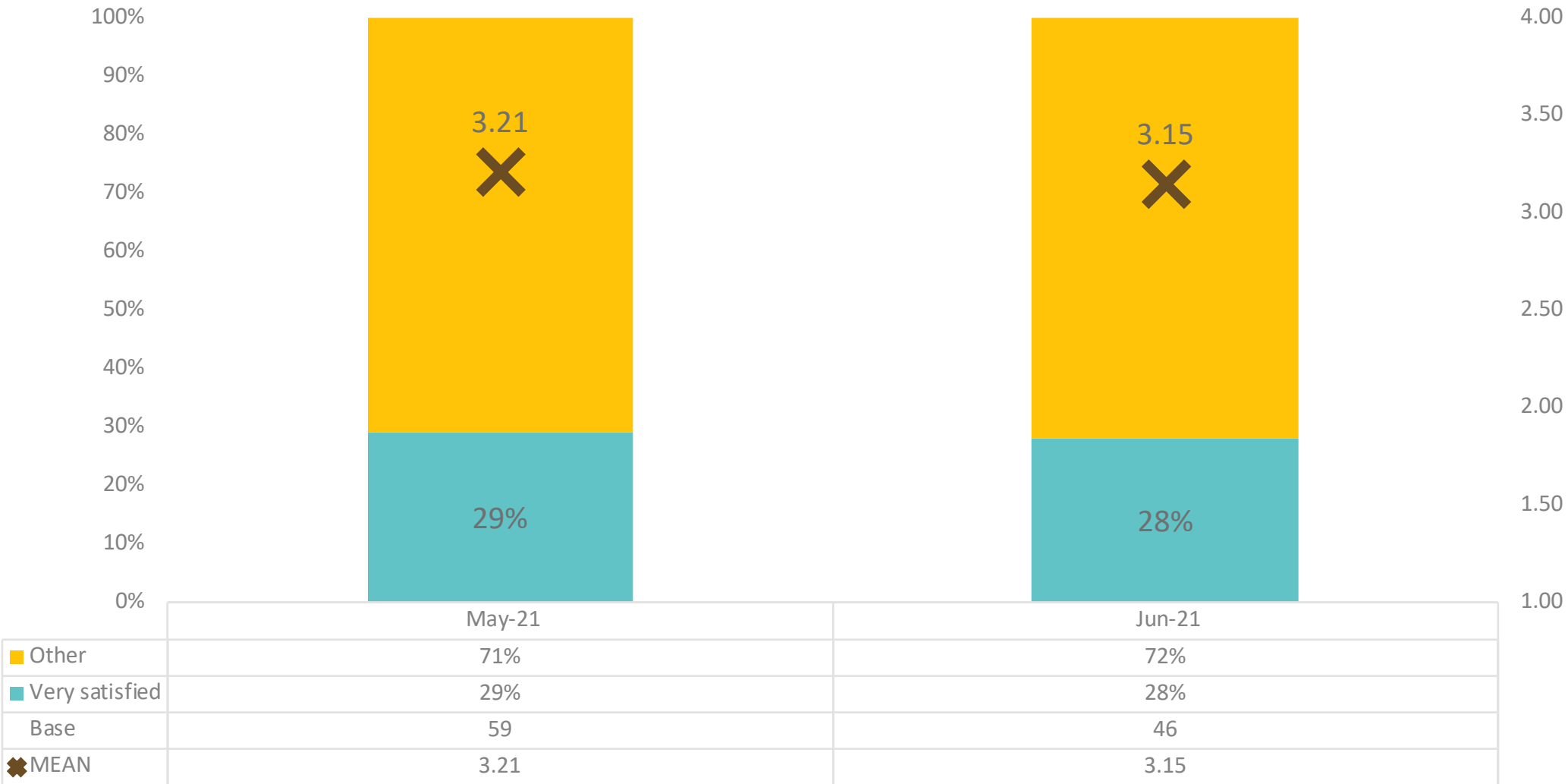


NEED-GAP ANALYSIS



ACCOMMODATIONS – SATISFACTION

4PT RATING SCALE

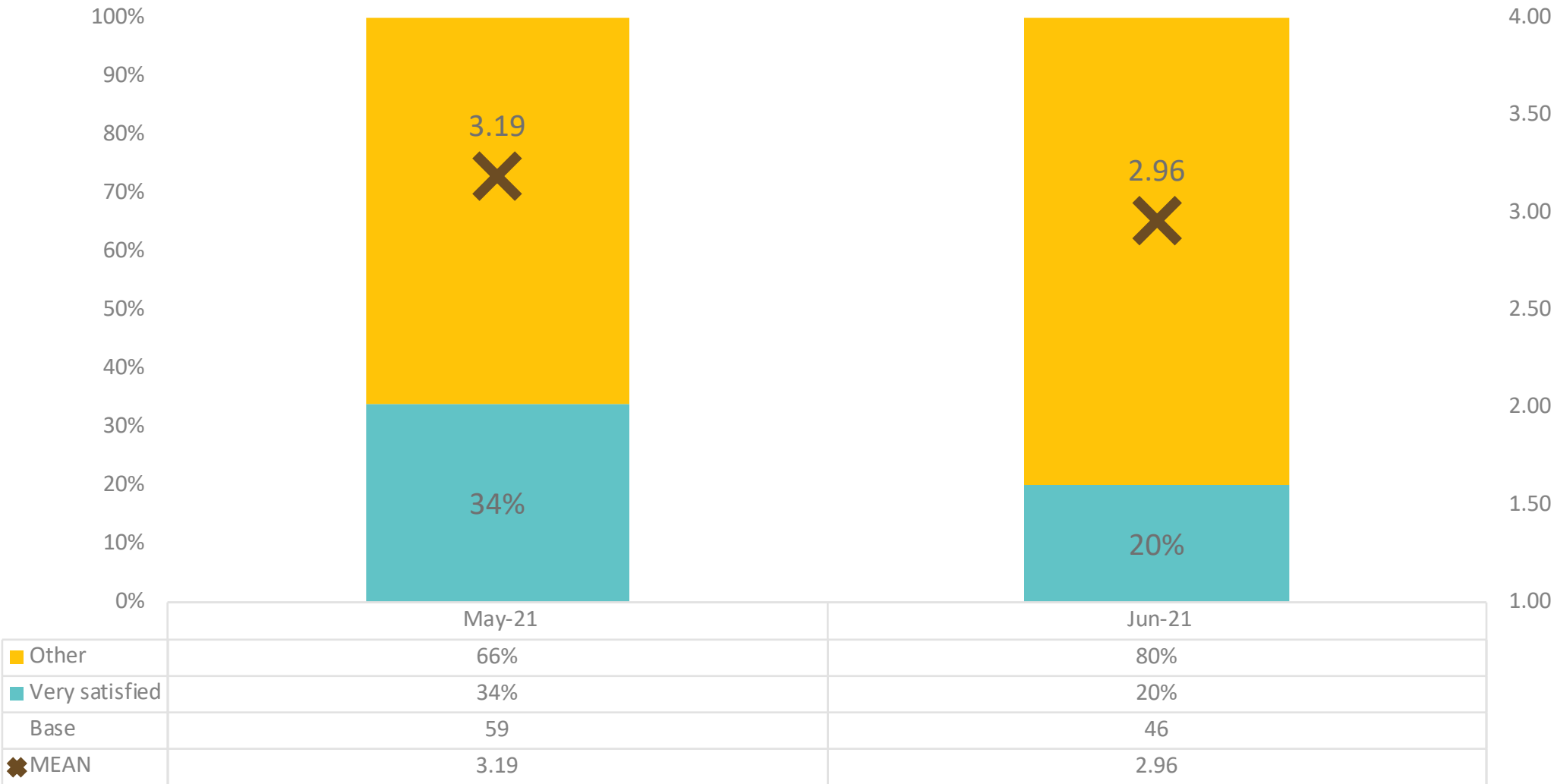


Caution
small
base



QUALITY CUSTOMER SERVICE – SATISFACTION

4PT RATING SCALE

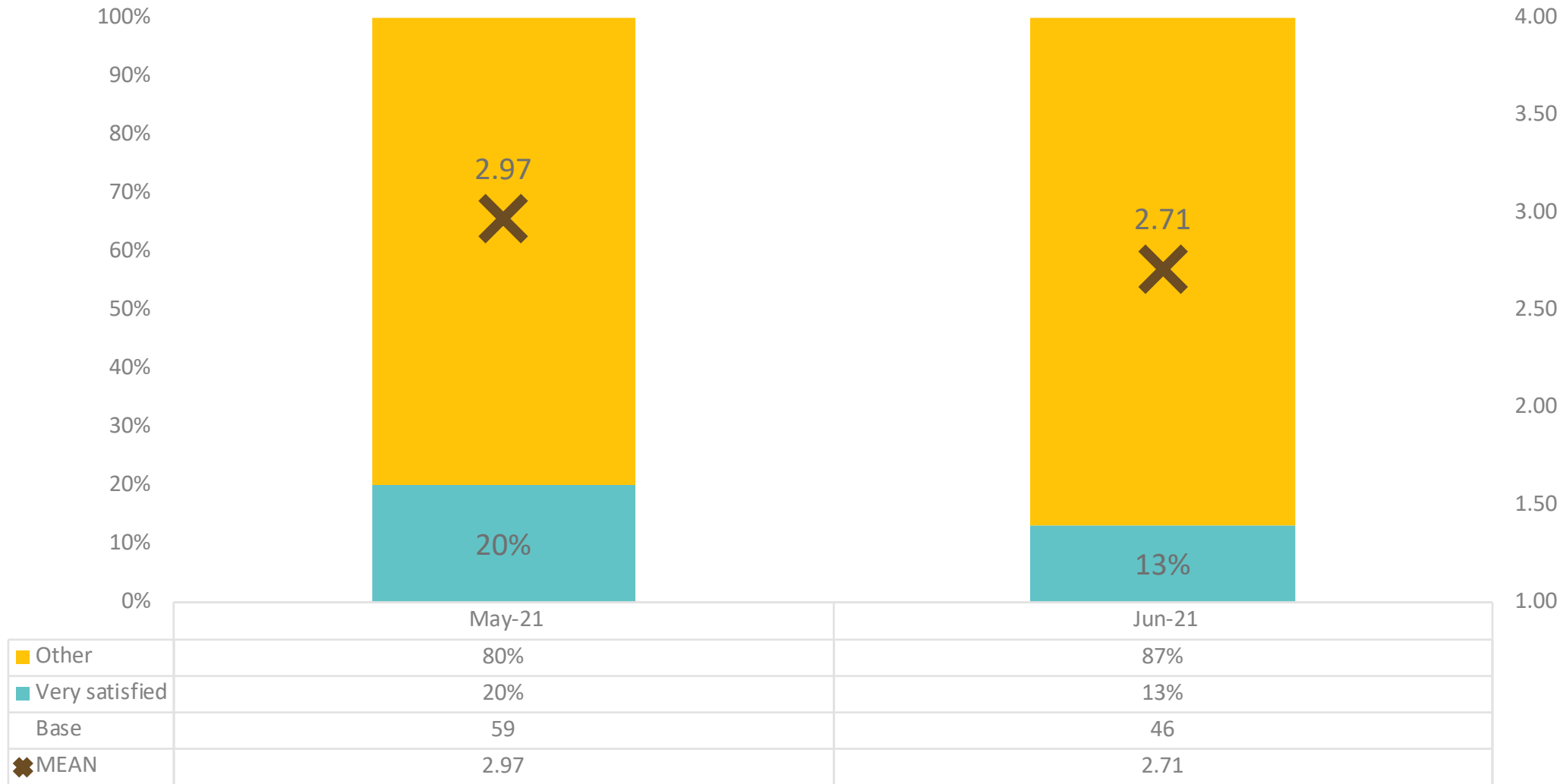


Caution
small
base



TRANSPORTATION OPTIONS – SATISFACTION

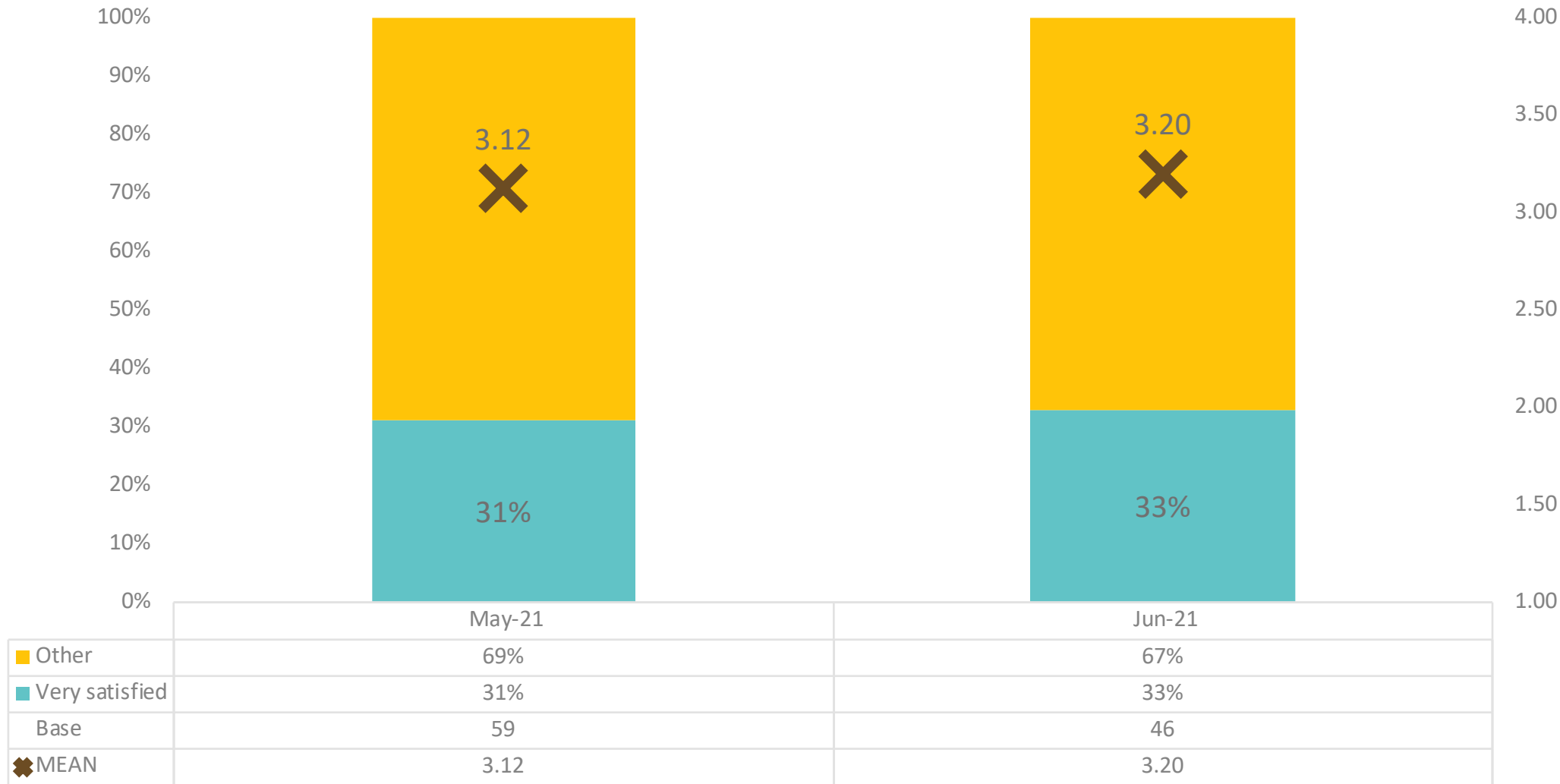
4PT RATING SCALE



Caution
small
base

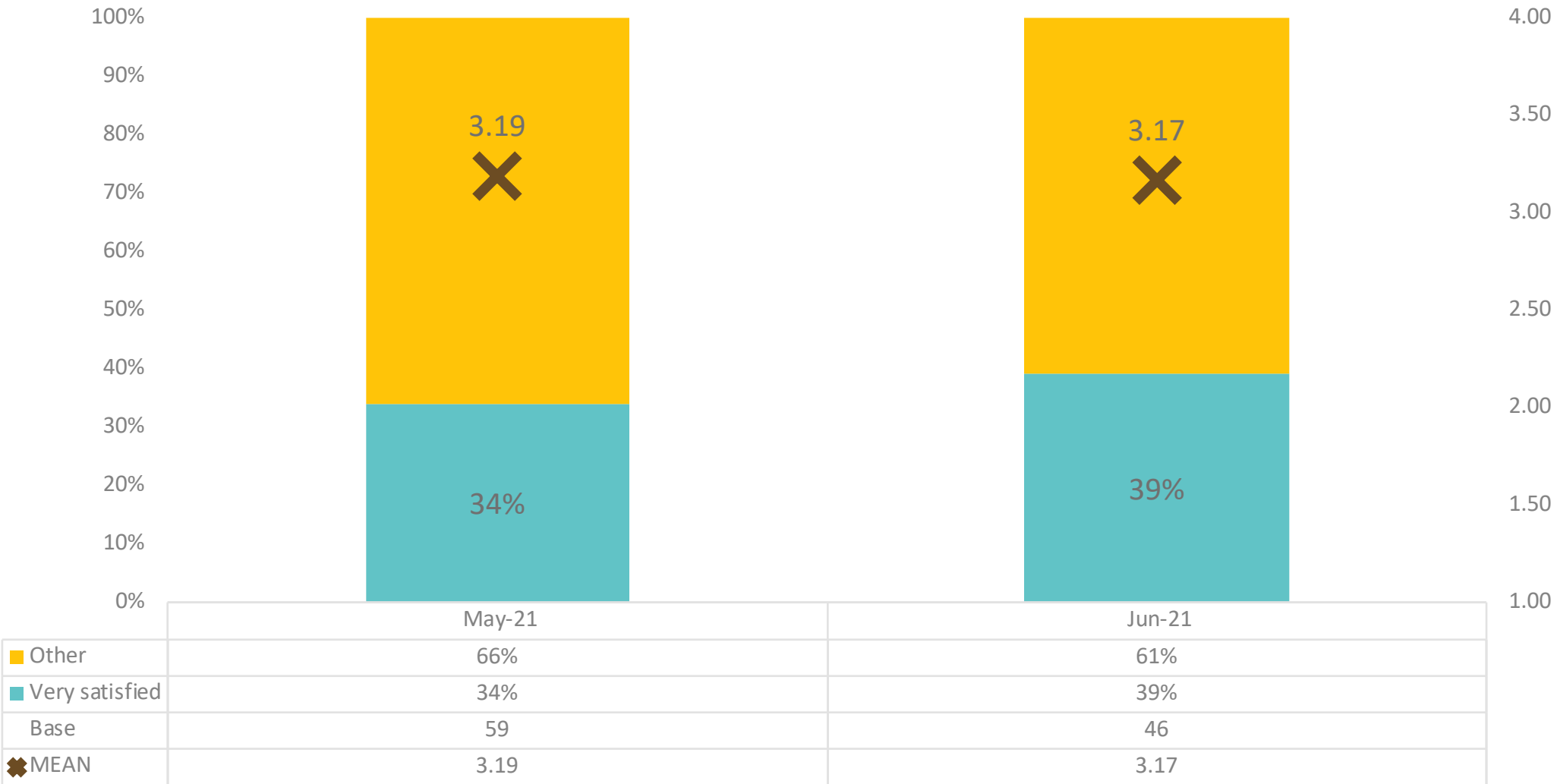
VISITORS FEEL WELCOME – SATISFACTION

4PT RATING SCALE



VARIETY OF ACTIVITIES – SATISFACTION

4PT RATING SCALE

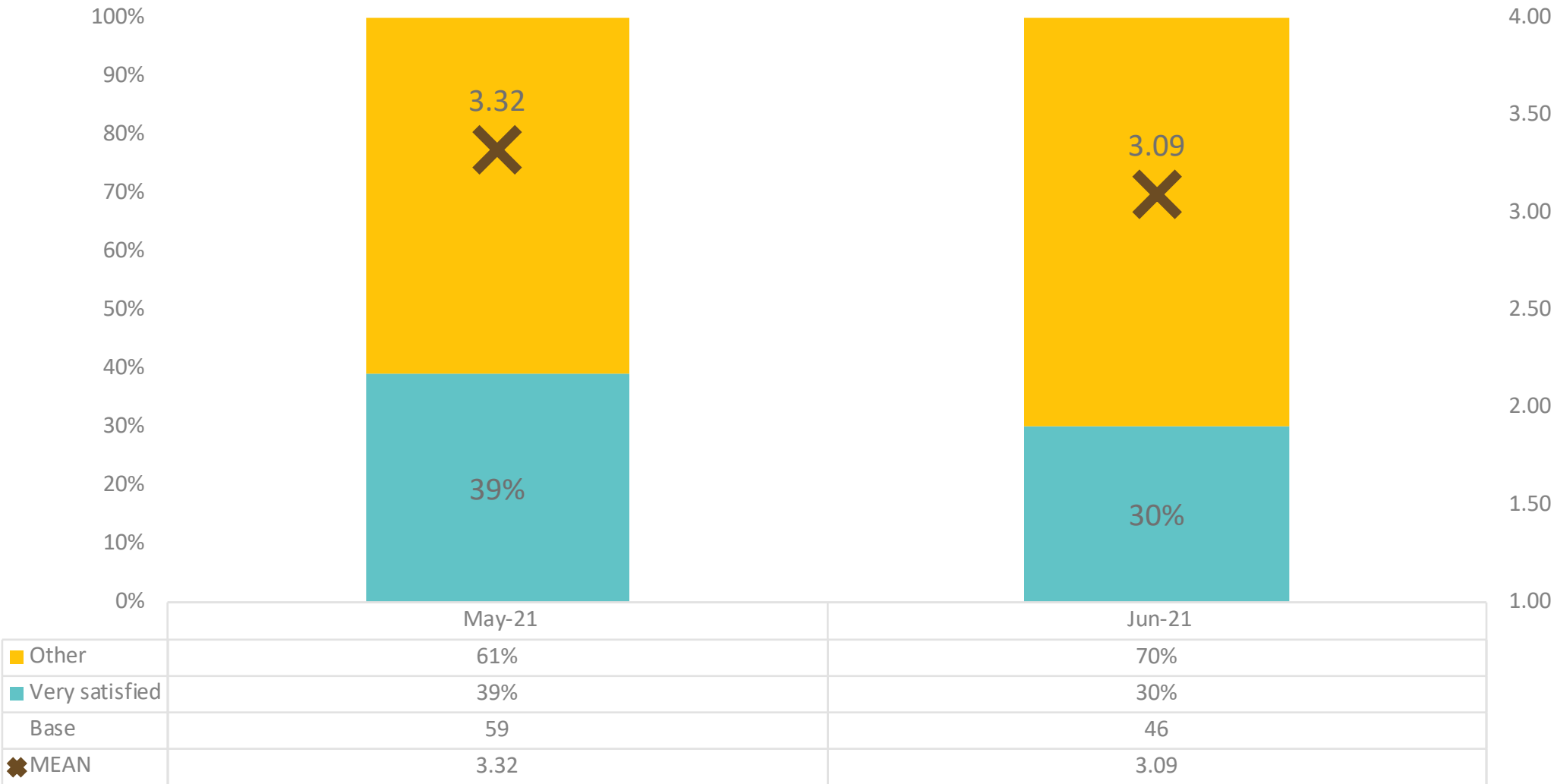


Caution
small
base



SHOPPING OPTIONS – SATISFACTION

4PT RATING SCALE

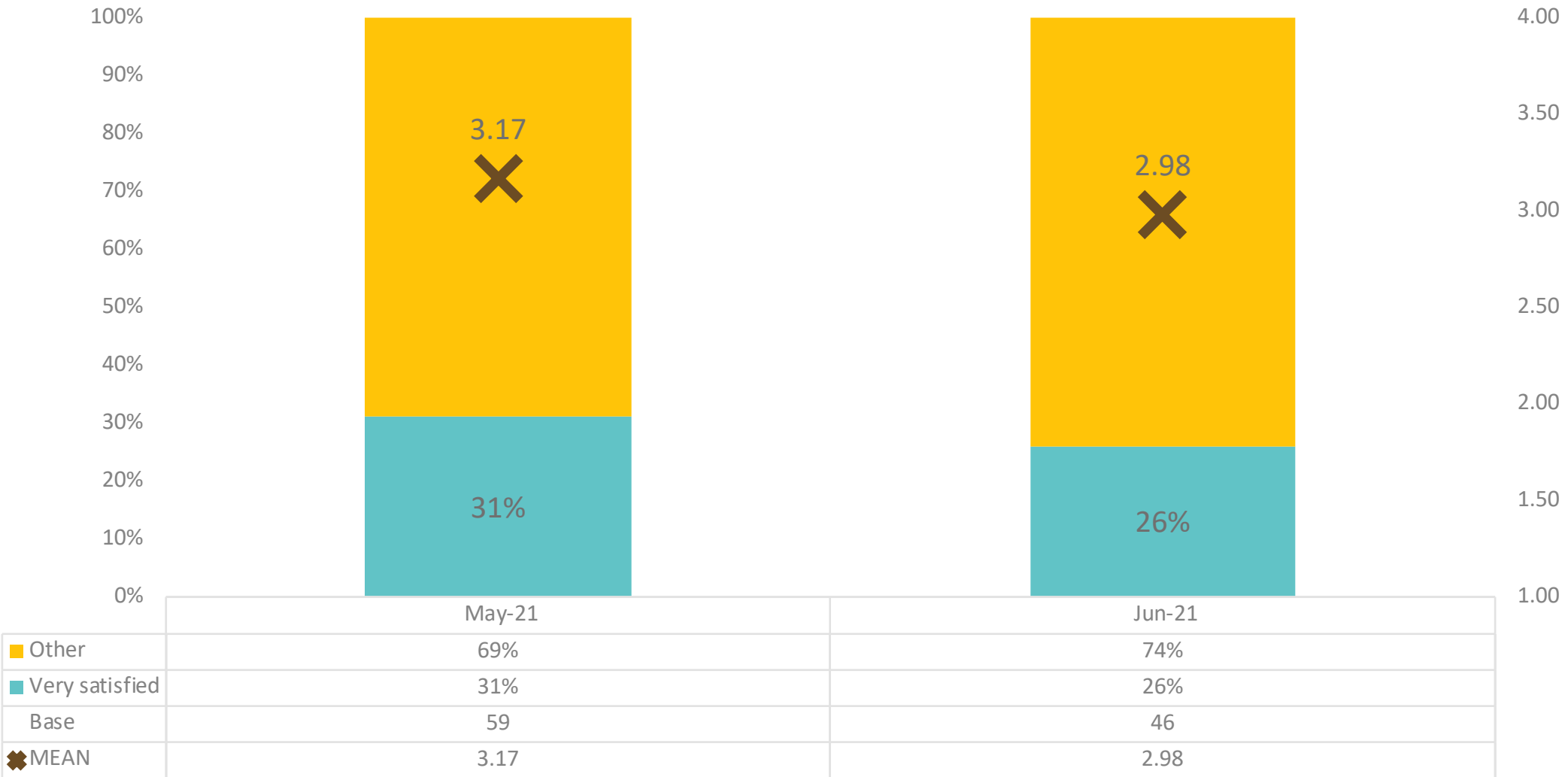


Caution
small
base



OVERALL VALUE – SATISFACTION

4PT RATING SCALE



Caution
small
base



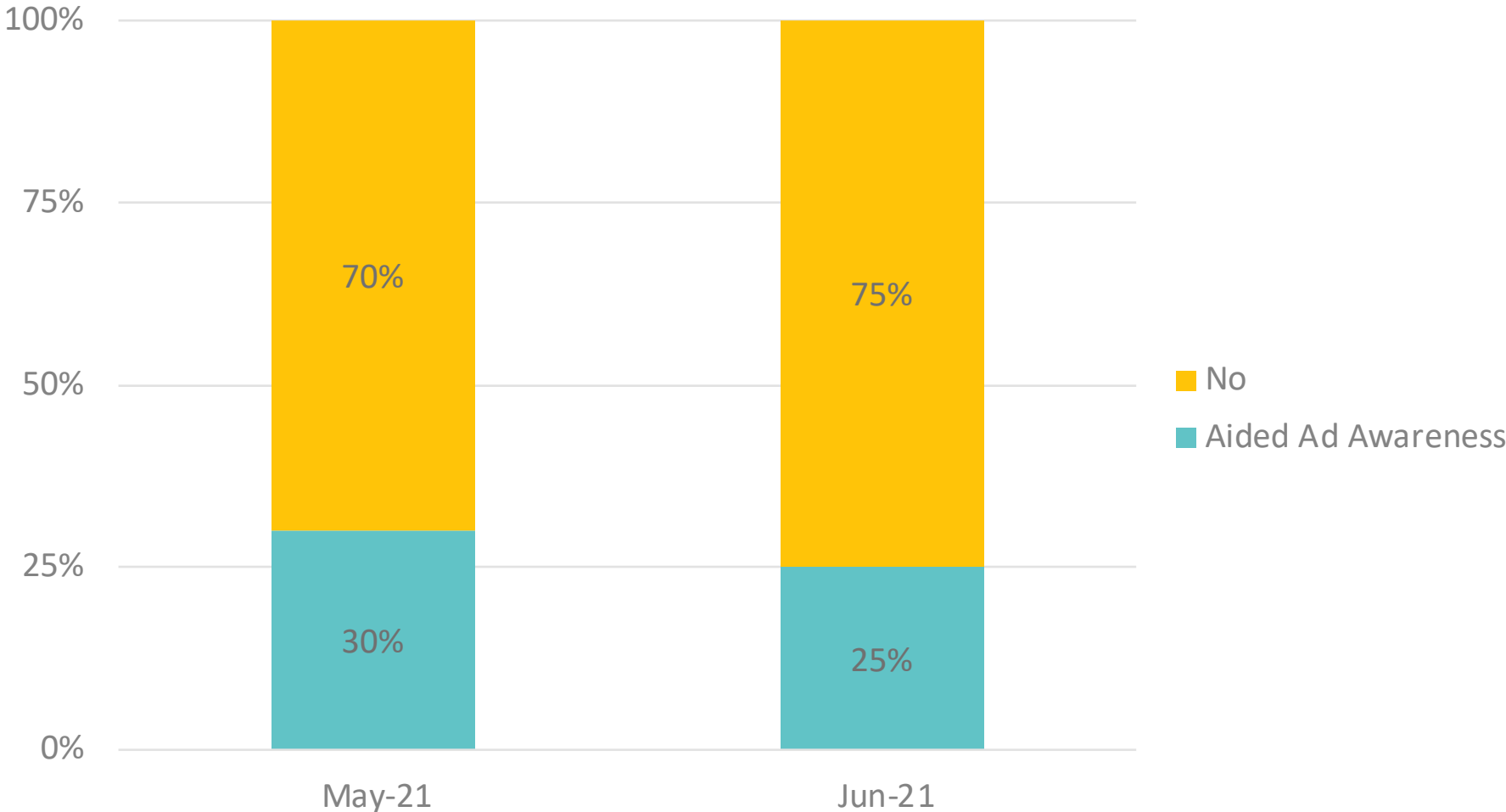


SECTION 4

MARKETING & COMMUNICATIONS



AIDED ADVERTISING AWARENESS



SOURCES OF INFORMATION ABOUT GUAM

	May 2021	June 2021
BASE	59	46
<i>Television</i>	32%	22%
<i>Recommendations – friends/ family</i>	25%	24%
<i>Travel guide websites</i>	14%	20%
<i>Travel agents</i>	14%	9%
<i>Social media</i>	7%	13%
<i>GVB website</i>	5%	11%
<i>Radio</i>	3%	-
<i>Other</i>	-	2%



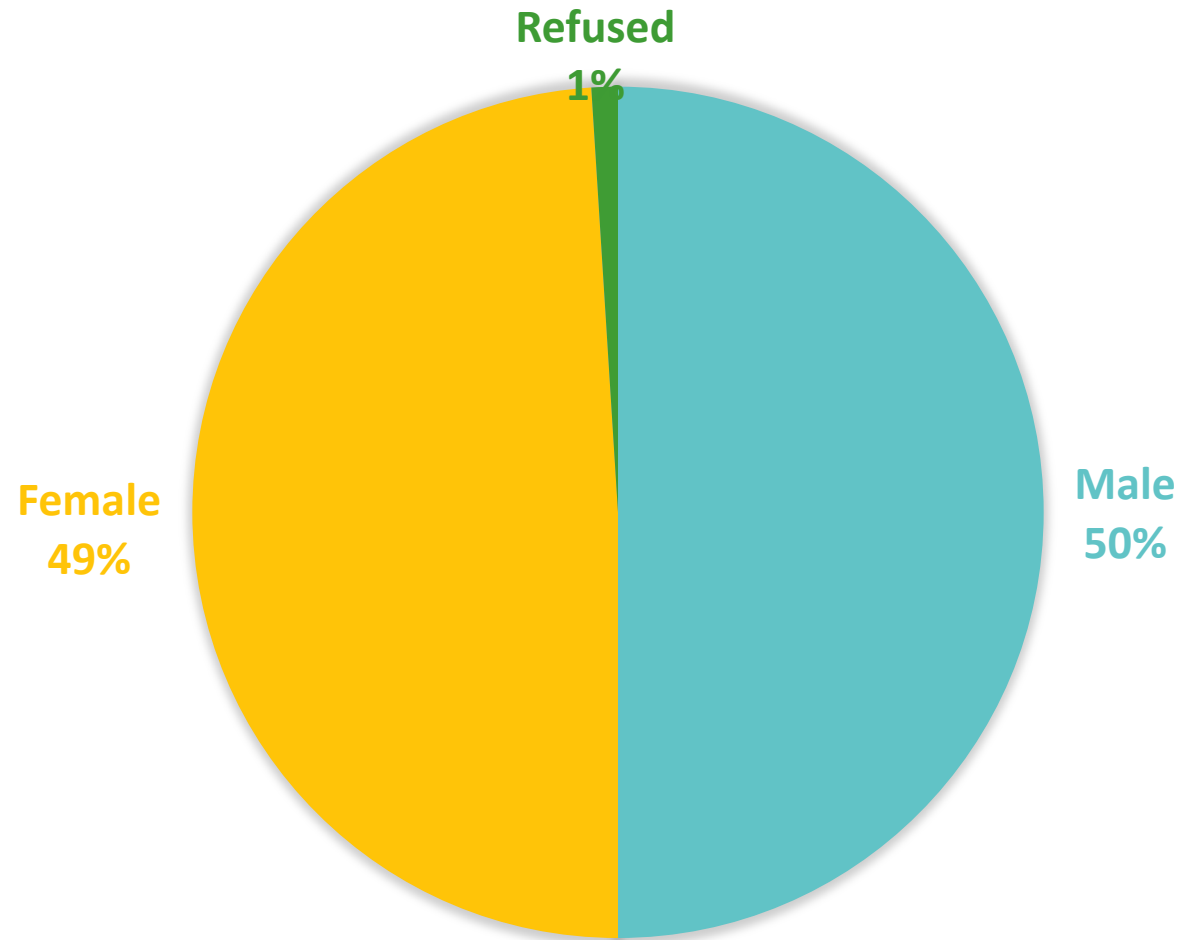


SECTION 5

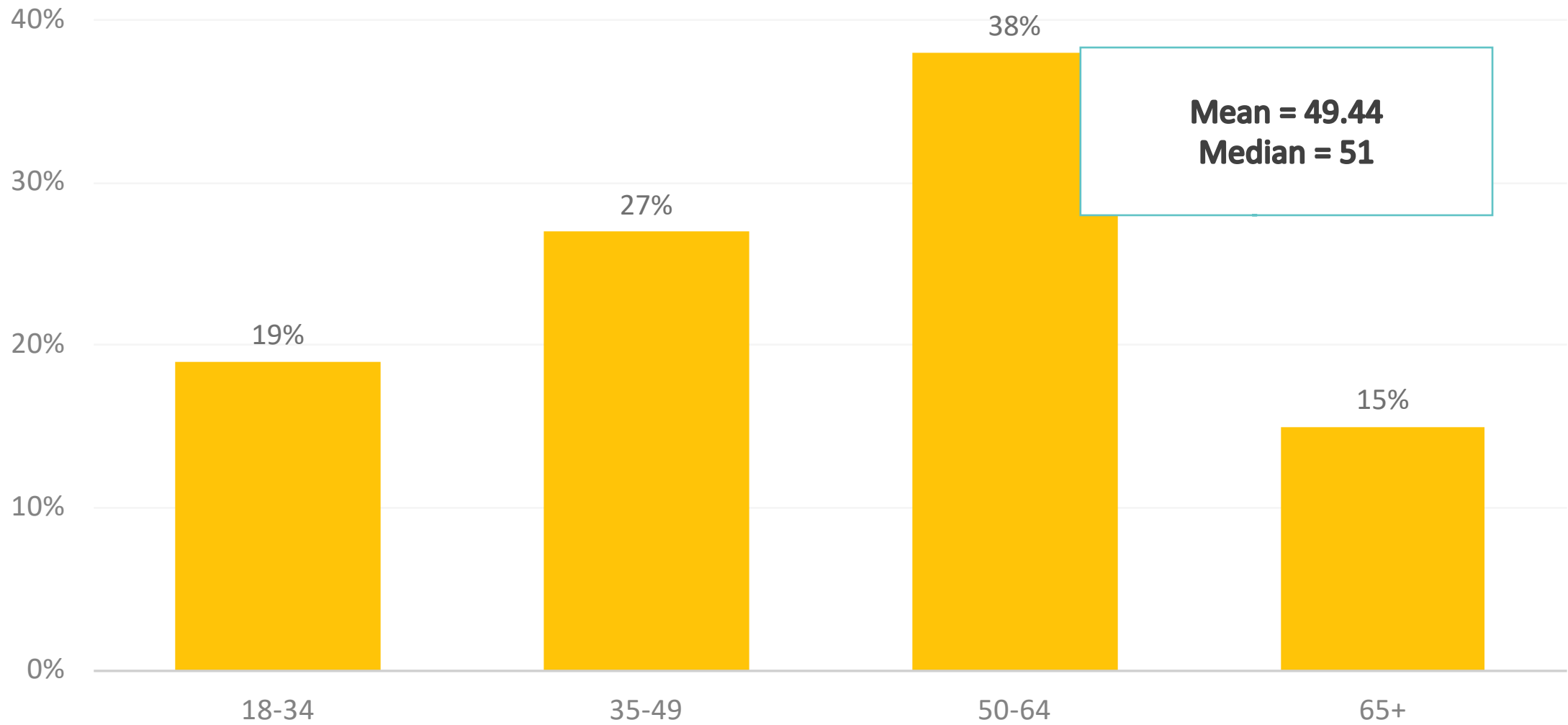
PROFILE OF RESPONDENTS



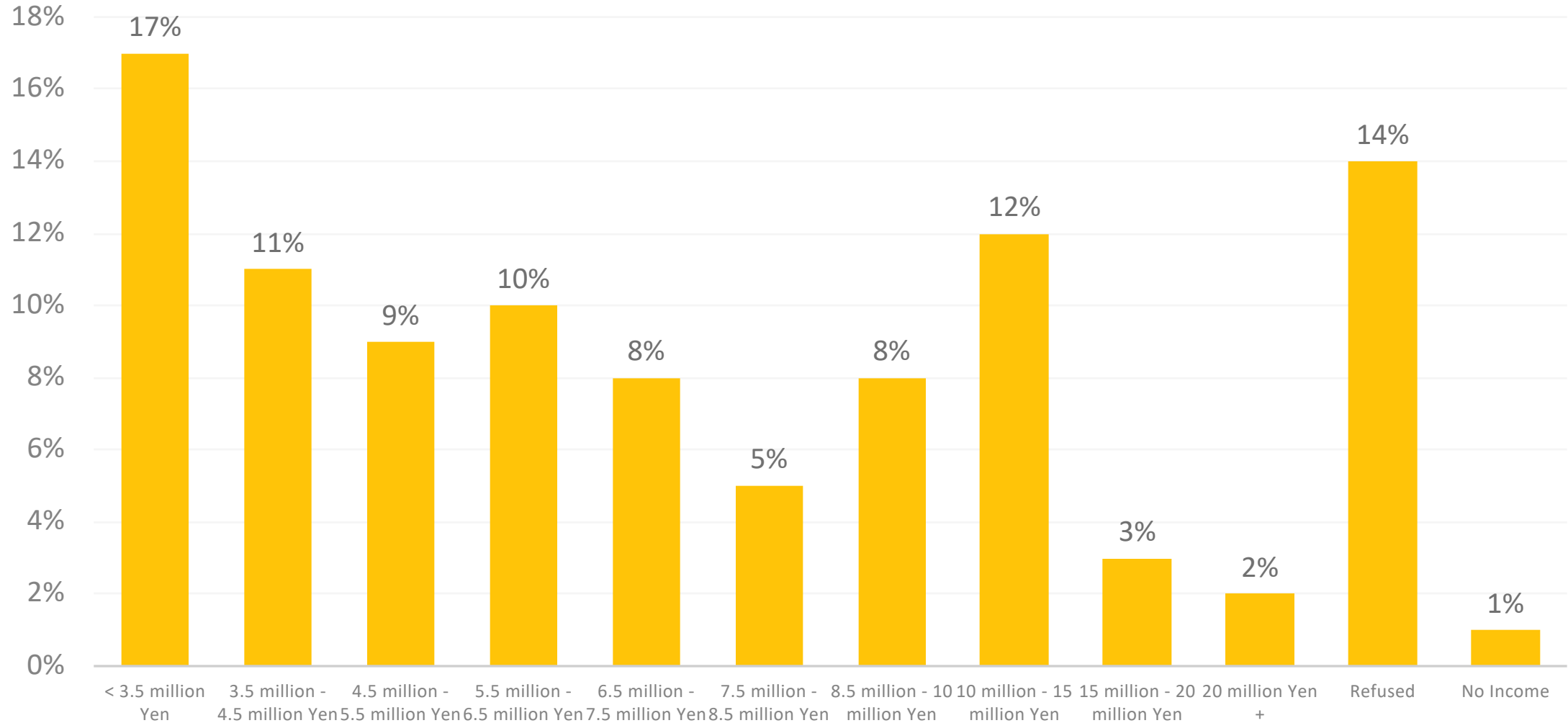
GENDER



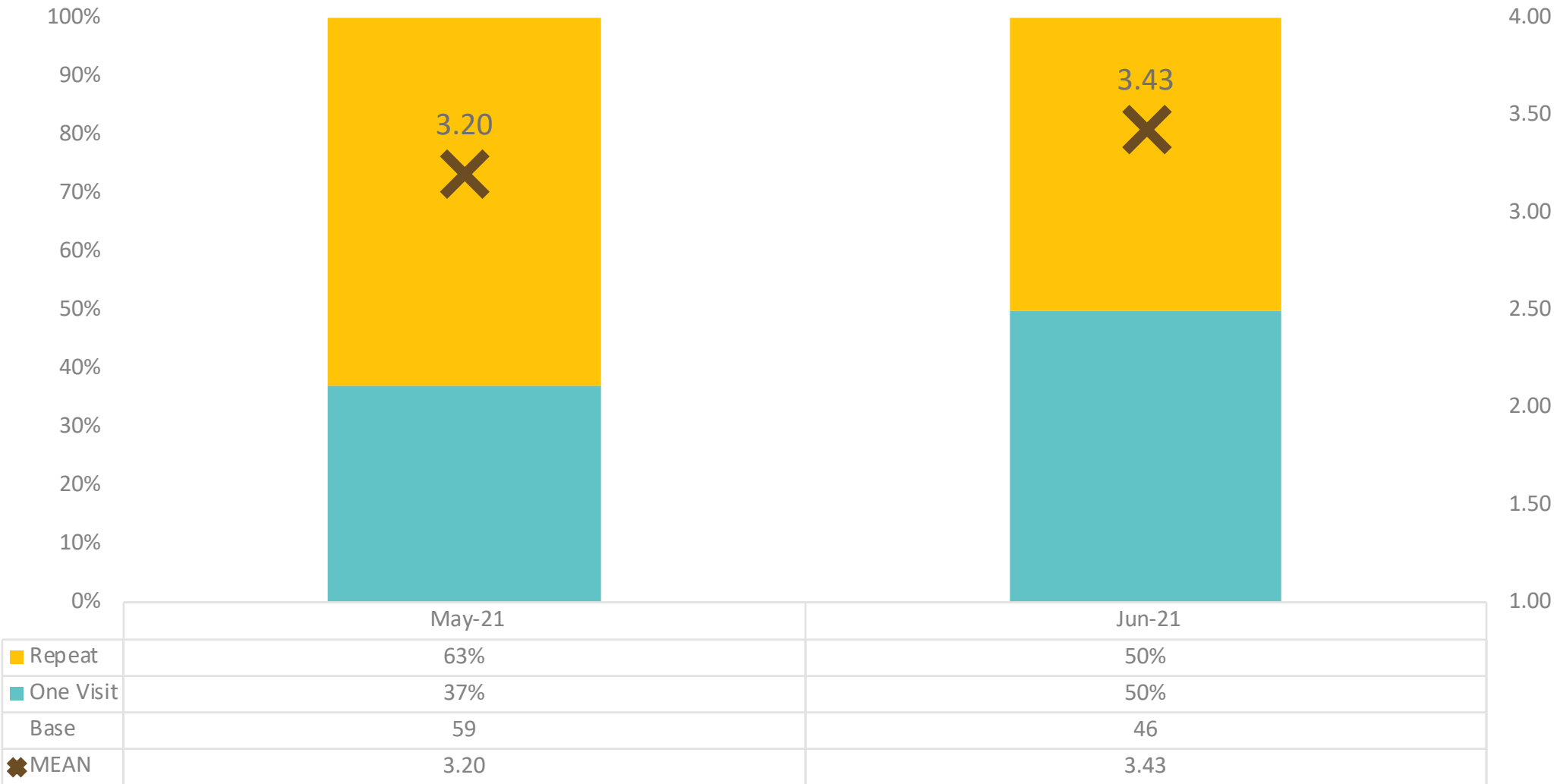
AGE



HOUSEHOLD INCOME



TRIPS TO GUAM



Q: You indicated you have visited Guam at least once in the past five years. How many trips have you made to Guam total?



INTERNATIONAL TRAVEL – Trips in last five years

