



Guam Visitors Bureau

Japan In-Market Insight Report

SEPTEMBER 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 September 16-23, 2021. A total of 307 surveys were collected during this period.
- The margin of error for a sample of 307 is +/- 5.59 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 +/- 5.59 percentage points.



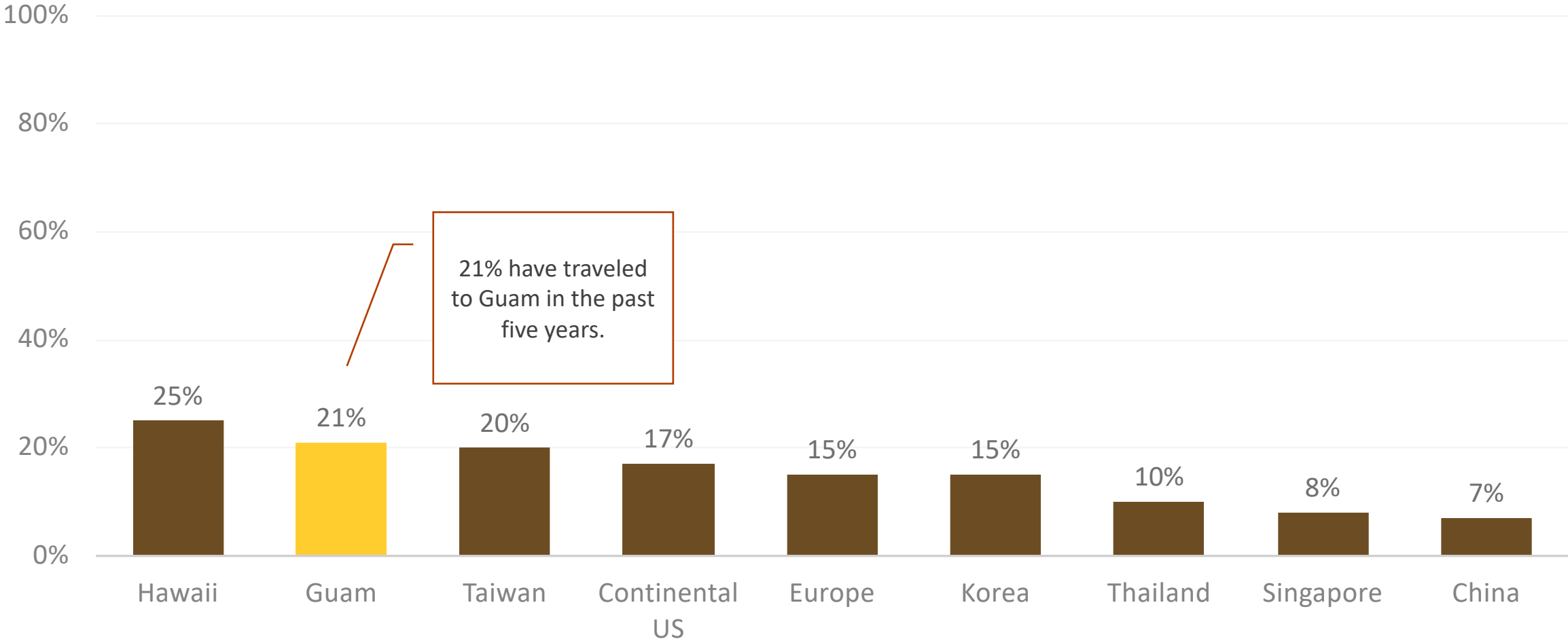


SECTION 1

TRAVEL PLANNING



TRAVEL HISTORY



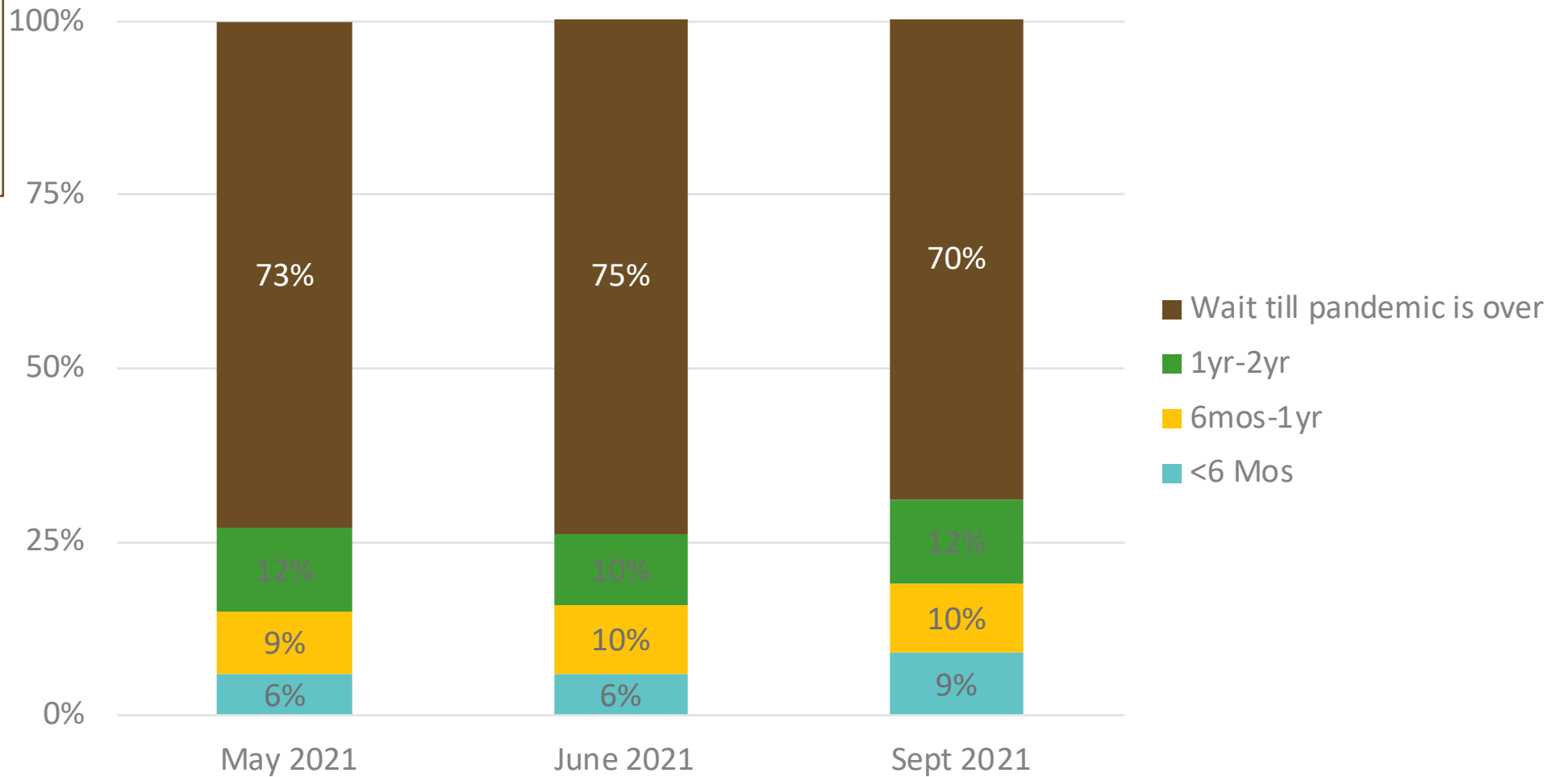
TRAVEL HISTORY

	May 2021	June 2021	Sept 2021
Hawaii	21%	20%	25%
Guam	18%	15%	21%
Taiwan	20%	18%	20%
Not traveling	15%	19%	19%
Continental U.S.	15%	15%	17%
Korea	22%	17%	15%
Europe	19%	18%	15%
Thailand	12%	10%	10%
Other	10%	10%	10%
Singapore	13%	11%	8%
China	10%	8%	7%

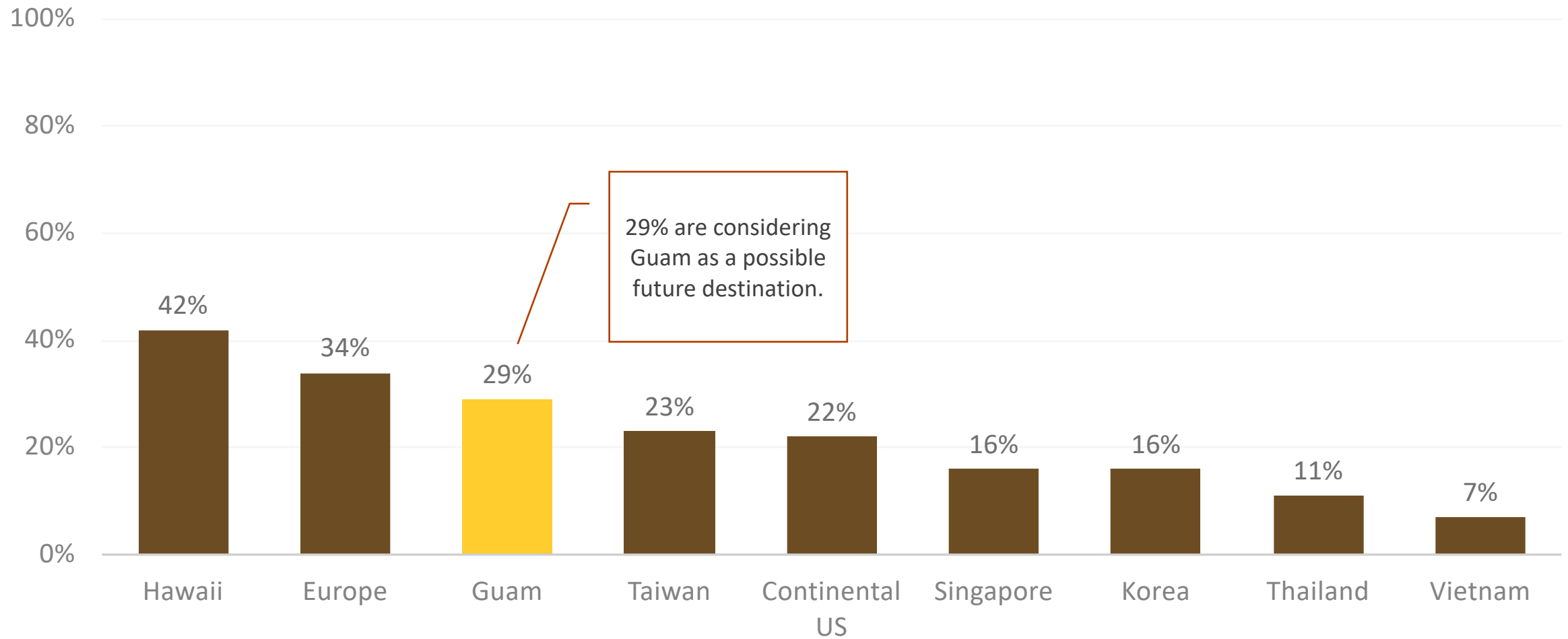


FUTURE TRAVEL PLANS

The Japan market will take time to recover.



POTENTIAL FUTURE TRAVEL DESTINATIONS



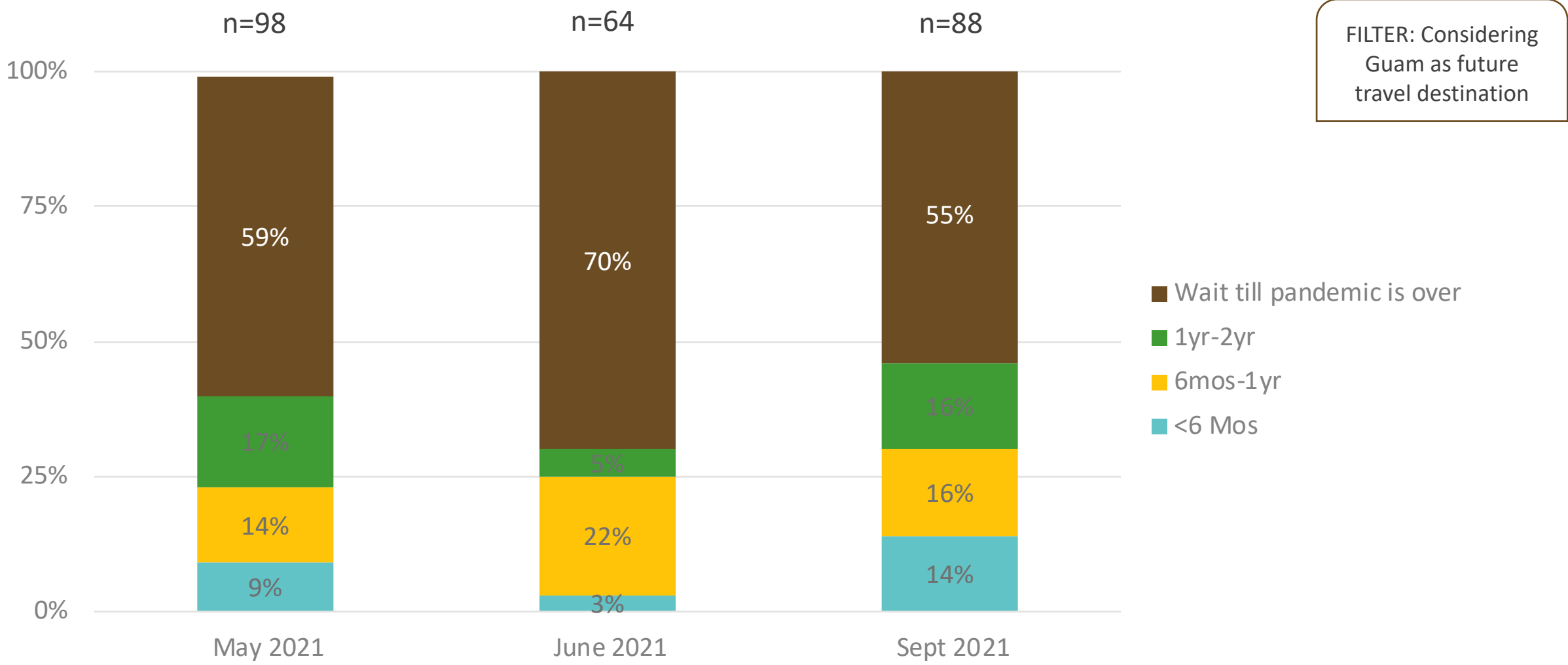
POTENTIAL FUTURE TRAVEL DESTINATIONS

	May 2021	June 2021	Sept 2021
Hawaii	38%	42%	42%
Europe	26%	28%	34%
Guam	30%	21%	29%
Taiwan	25%	25%	23%
Continental U.S.	15%	17%	22%
Singapore	16%	12%	16%
Korea	16%	11%	16%
Thailand	13%	11%	11%
Vietnam	7%	7%	7%
Indonesia	6%	5%	6%

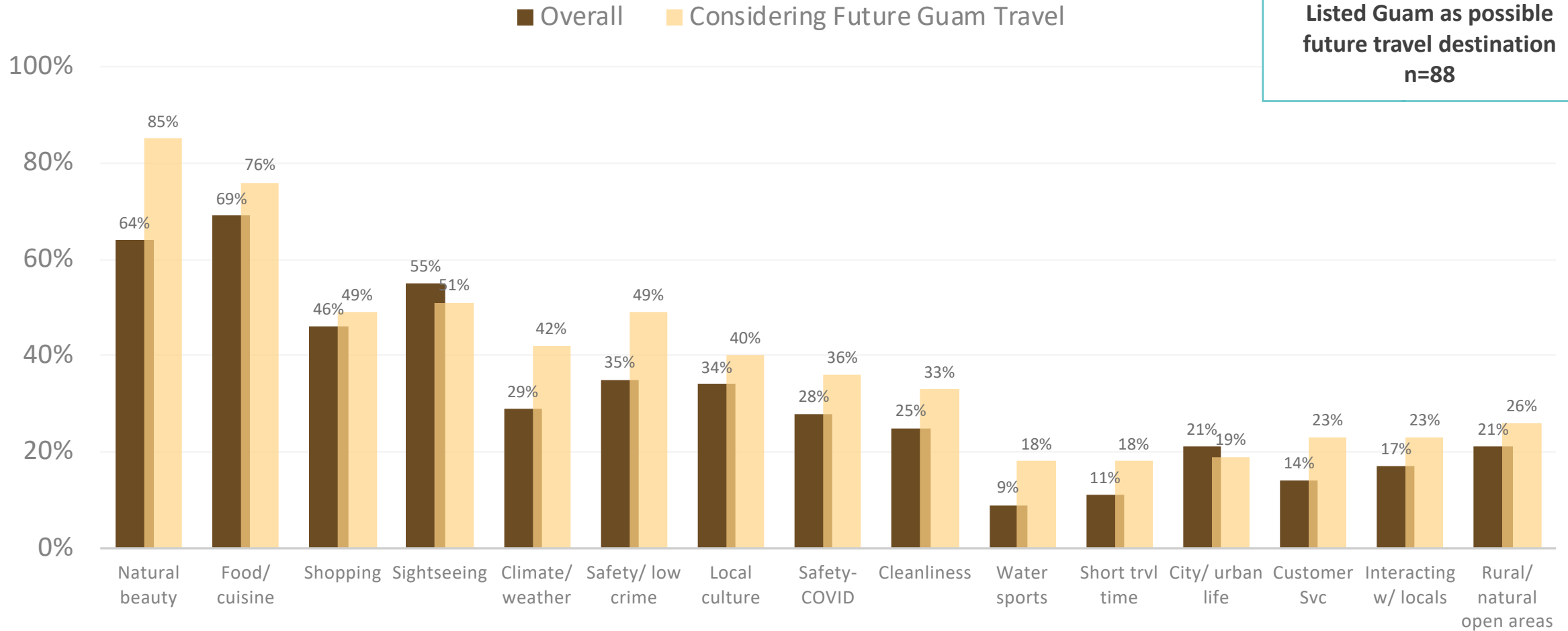


The proportion of Japanese visitors considering Guam as potential travel destinations is up this reporting period compared to June 2021.

TIMING OF FUTURE TRAVEL TO GUAM



APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS

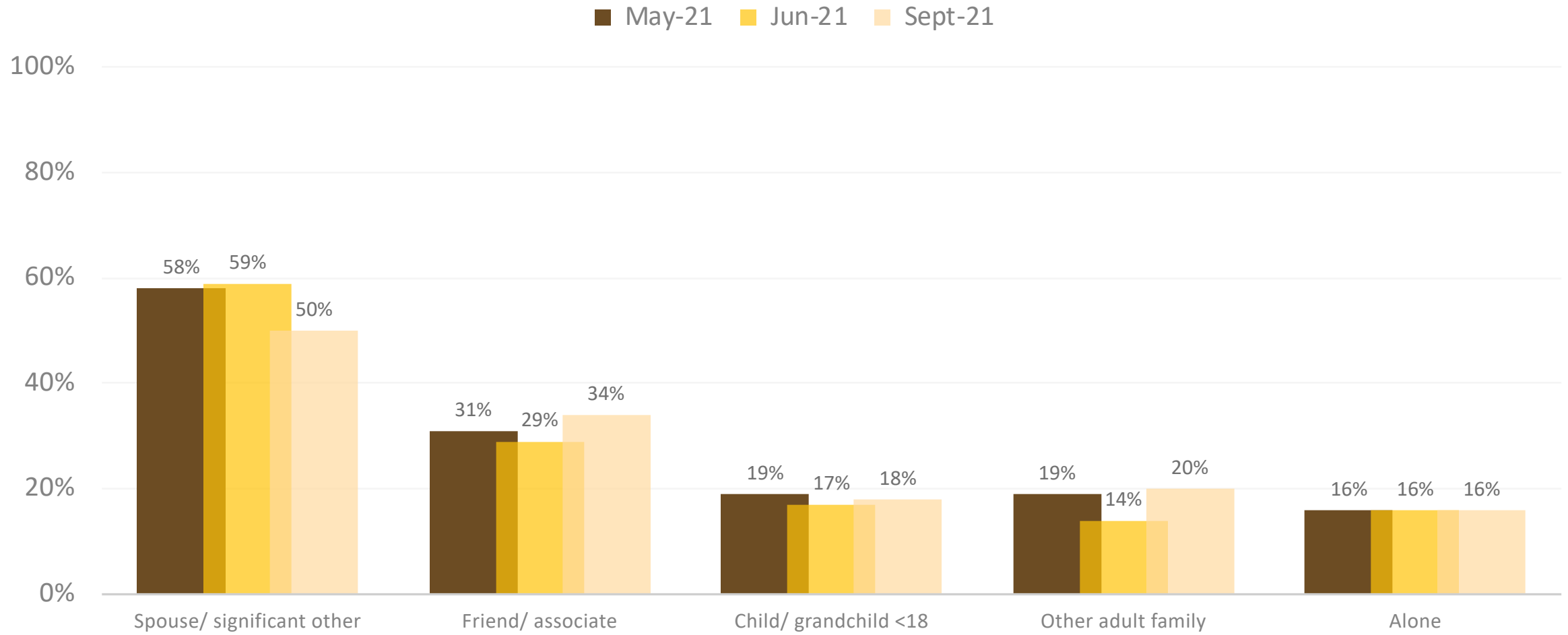


APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS

	May 2021	June 2021	Sept 2021
Food/ cuisine	59%	61%	69%
Natural beauty	64%	60%	64%
Sightseeing	51%	53%	55%
Shopping	41%	40%	46%
Safety- crime	33%	30%	35%
Local culture	32%	31%	34%
Climate/ weather	27%	26%	29%
Safety- COVID	26%	24%	28%
Cleanliness	21%	21%	25%
Rural/ open spaces	16%	13%	21%
City/ urban life	10%	16%	21%
Interacting w/ locals	16%	10%	17%
Short travel time	11%	8%	11%
Water sports	13%	8%	9%



FUTURE INTERNATIONAL TRAVEL PARTY



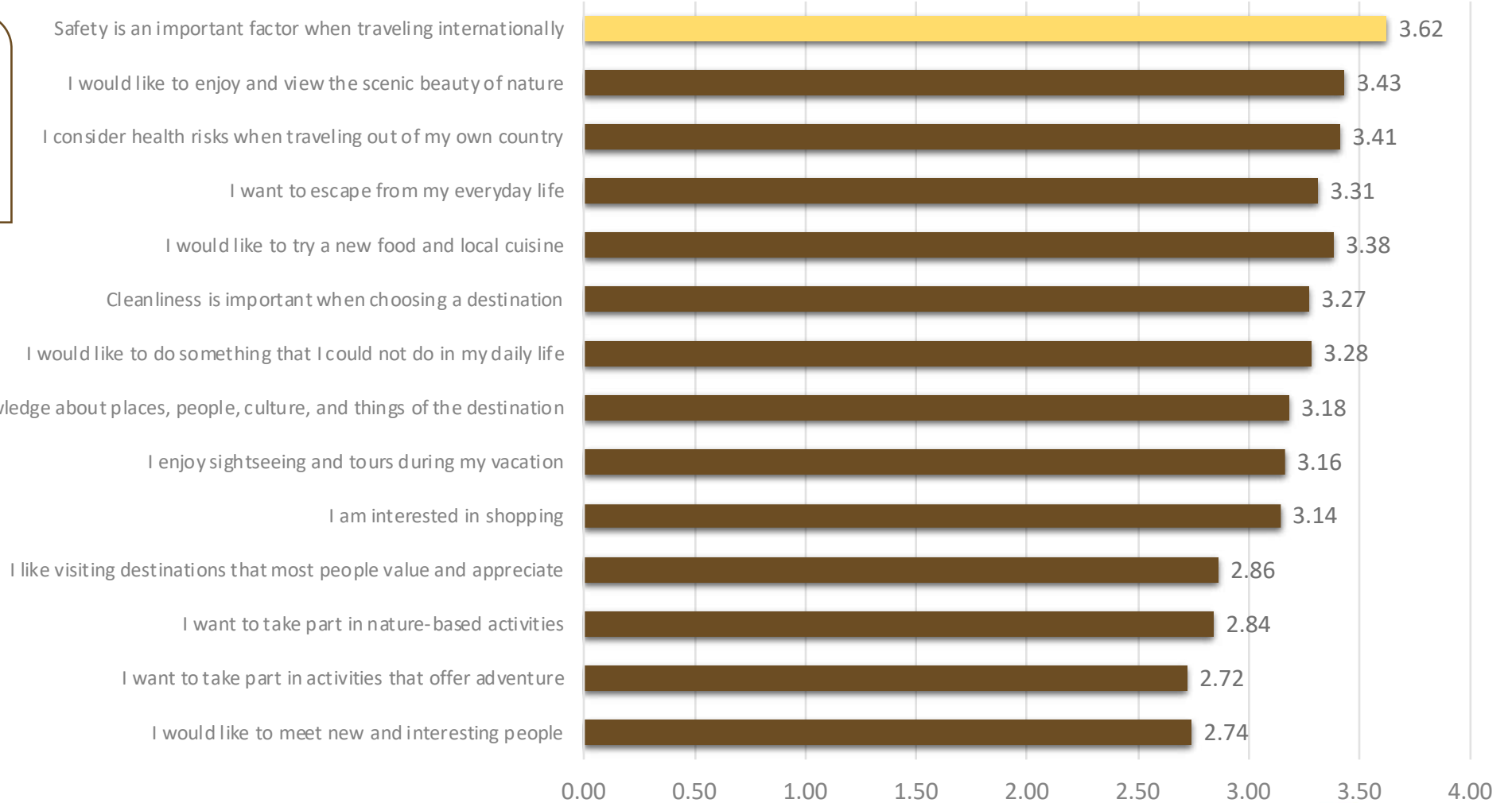
Q: Thinking of your travel plans post-COVID-19, who are you most looking forward to traveling with to an international destination?



DESTINATION SELECTION FACTORS – IMPORTANCE

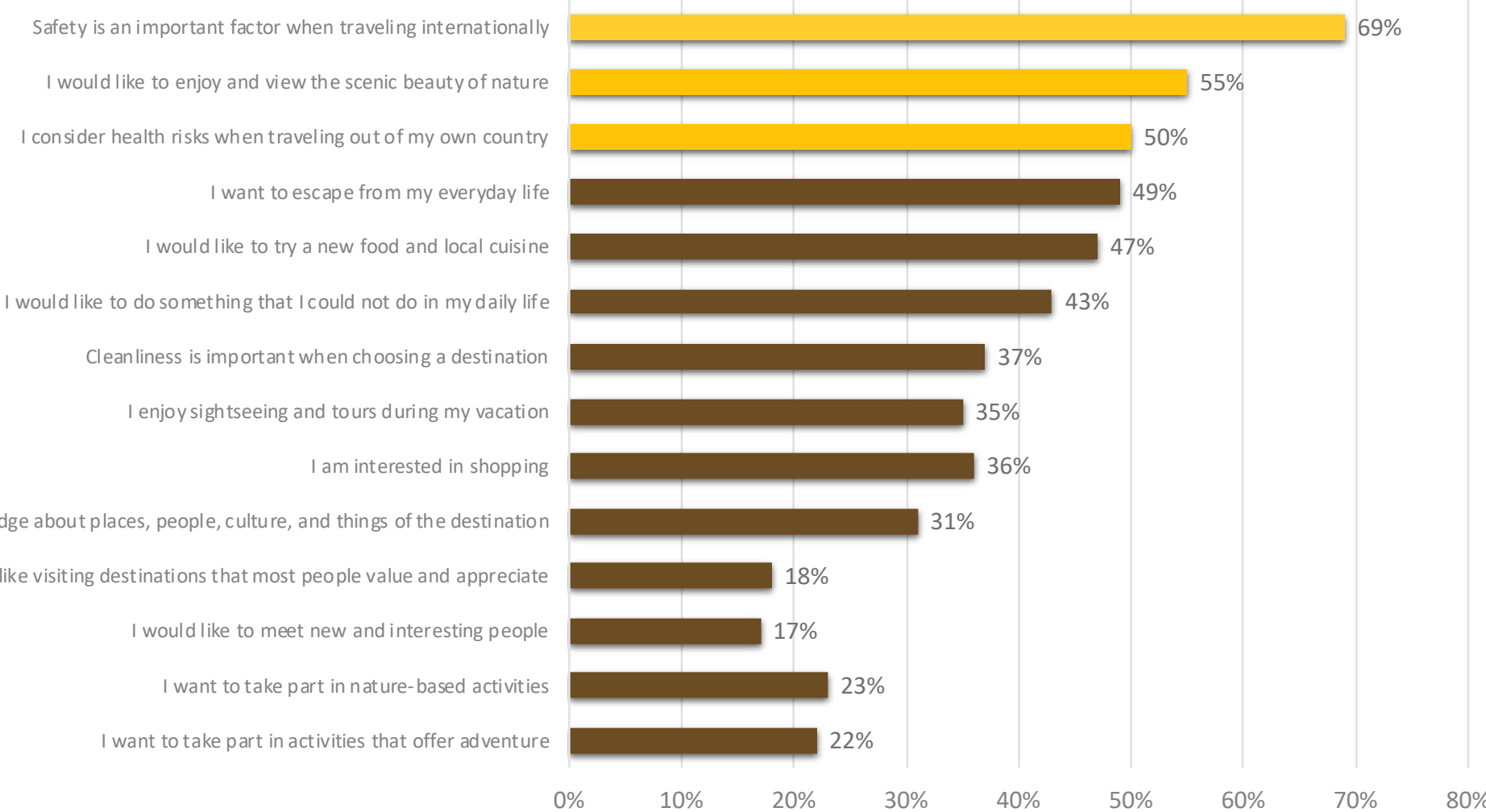
MEAN SCORE 4PT SCALE

One (yellow) selection factors received mean scores above the 3.50.

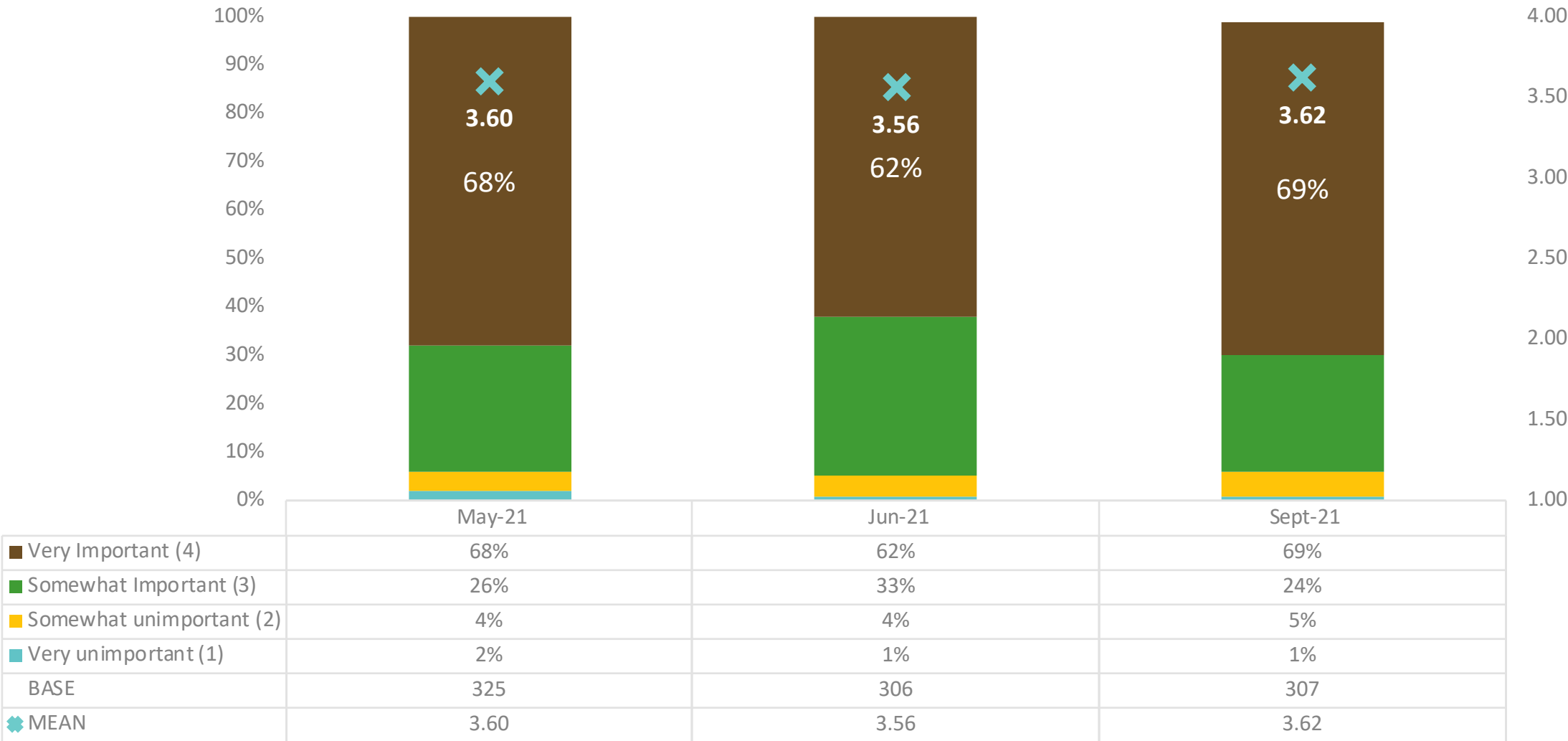


DESTINATION SELECTION FACTORS – VERY IMPORTANT / TOP BOX

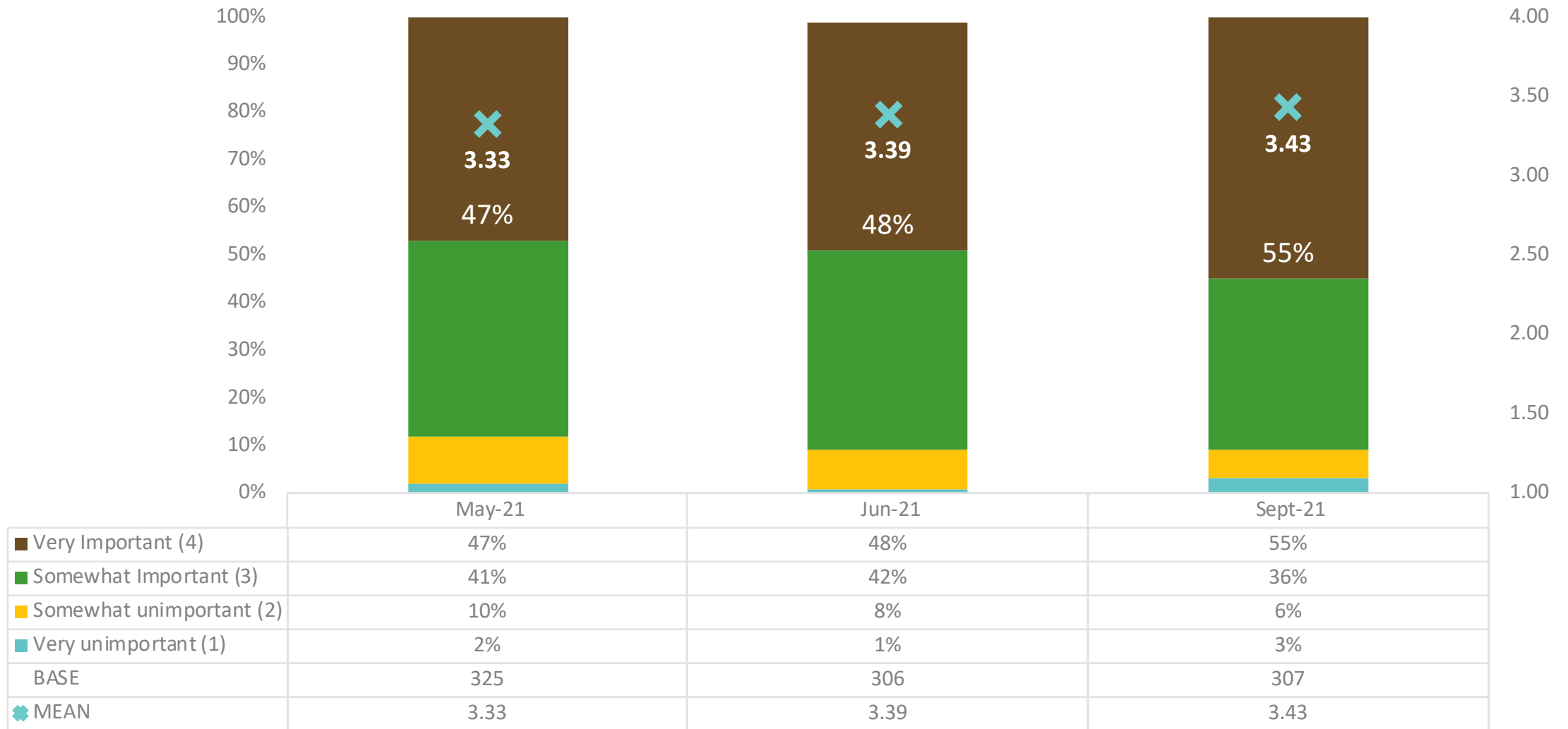
Just three (yellow) selection factor received a top box (very important) score above 50%



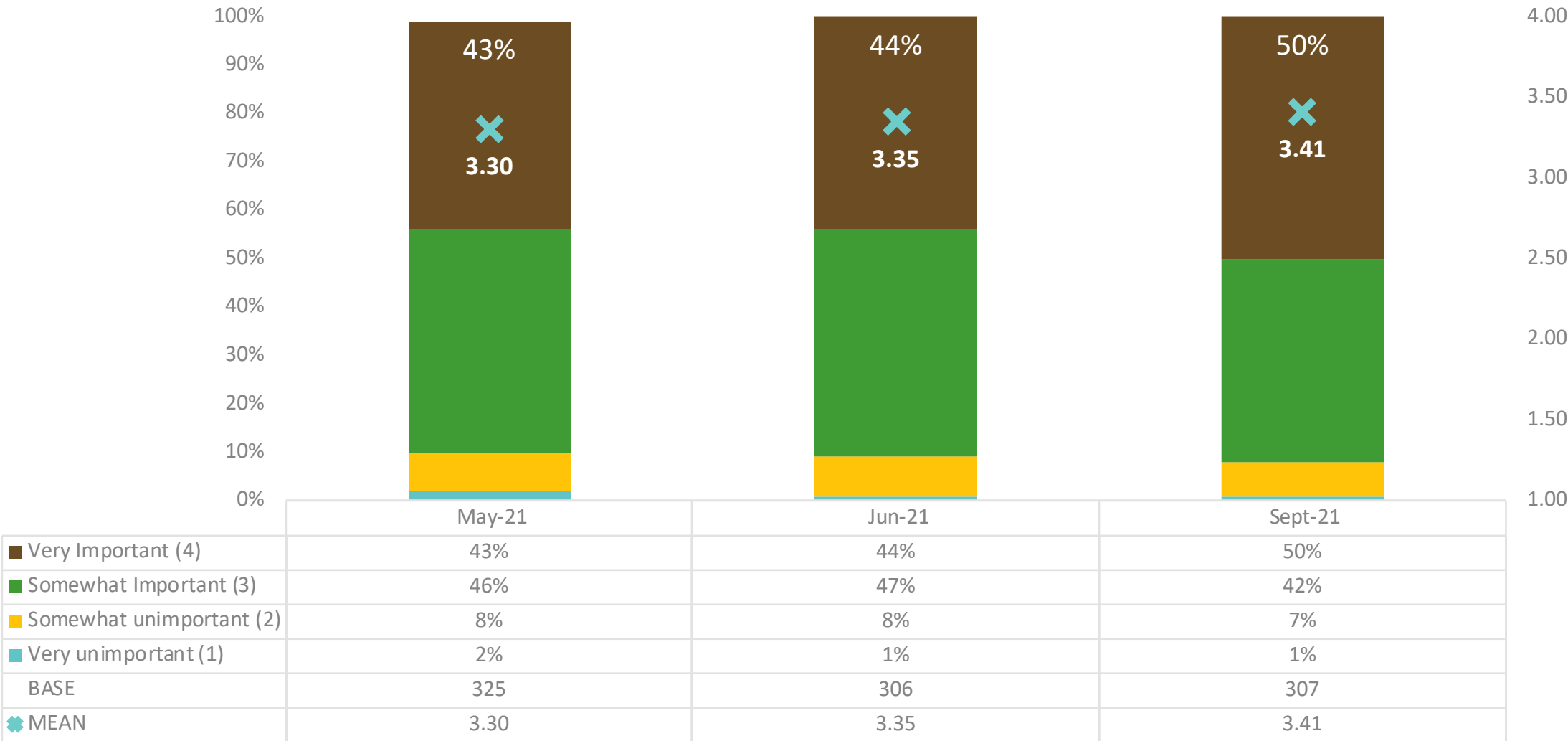
Safety is an important factor when traveling internationally



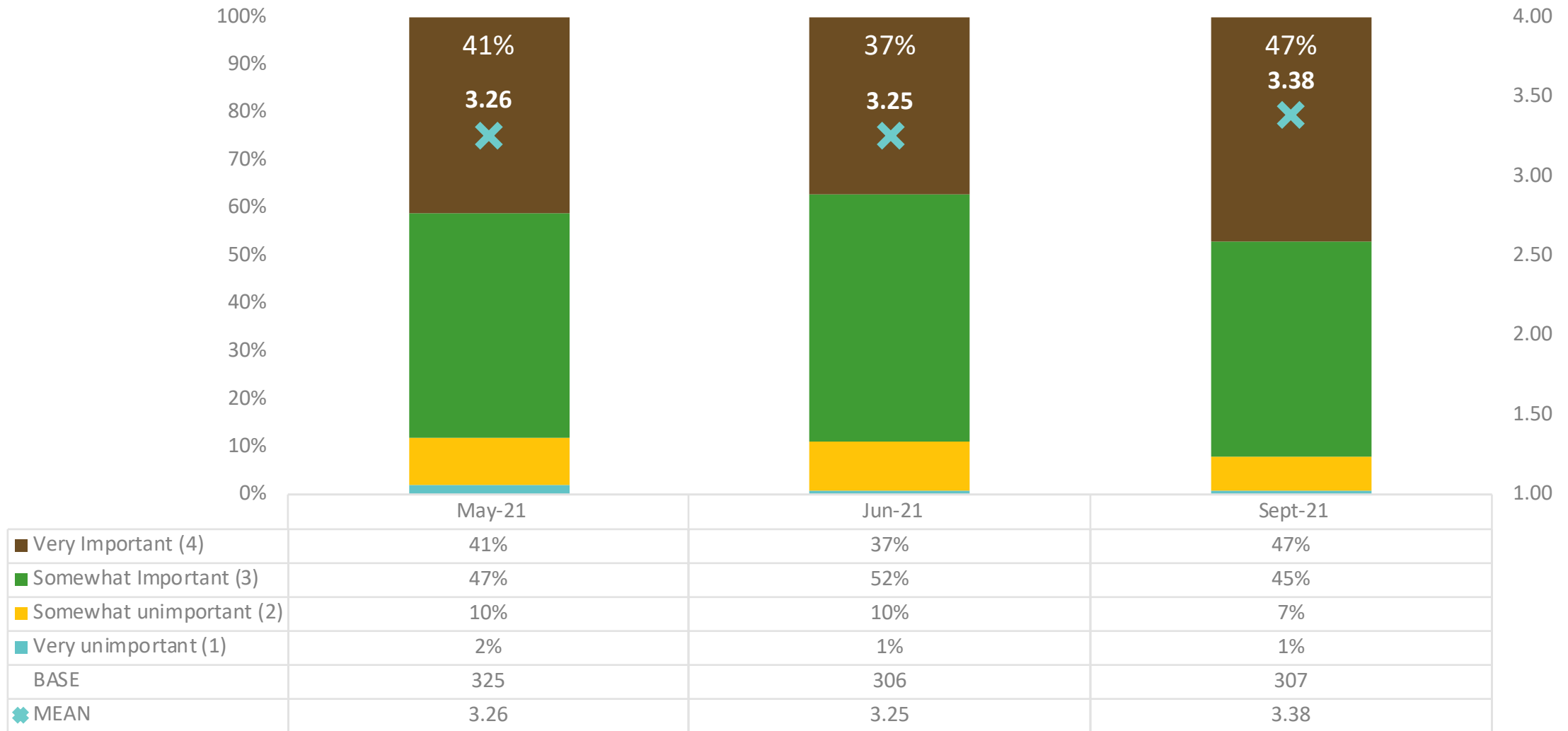
I would like to enjoy and view the scenic beauty of nature



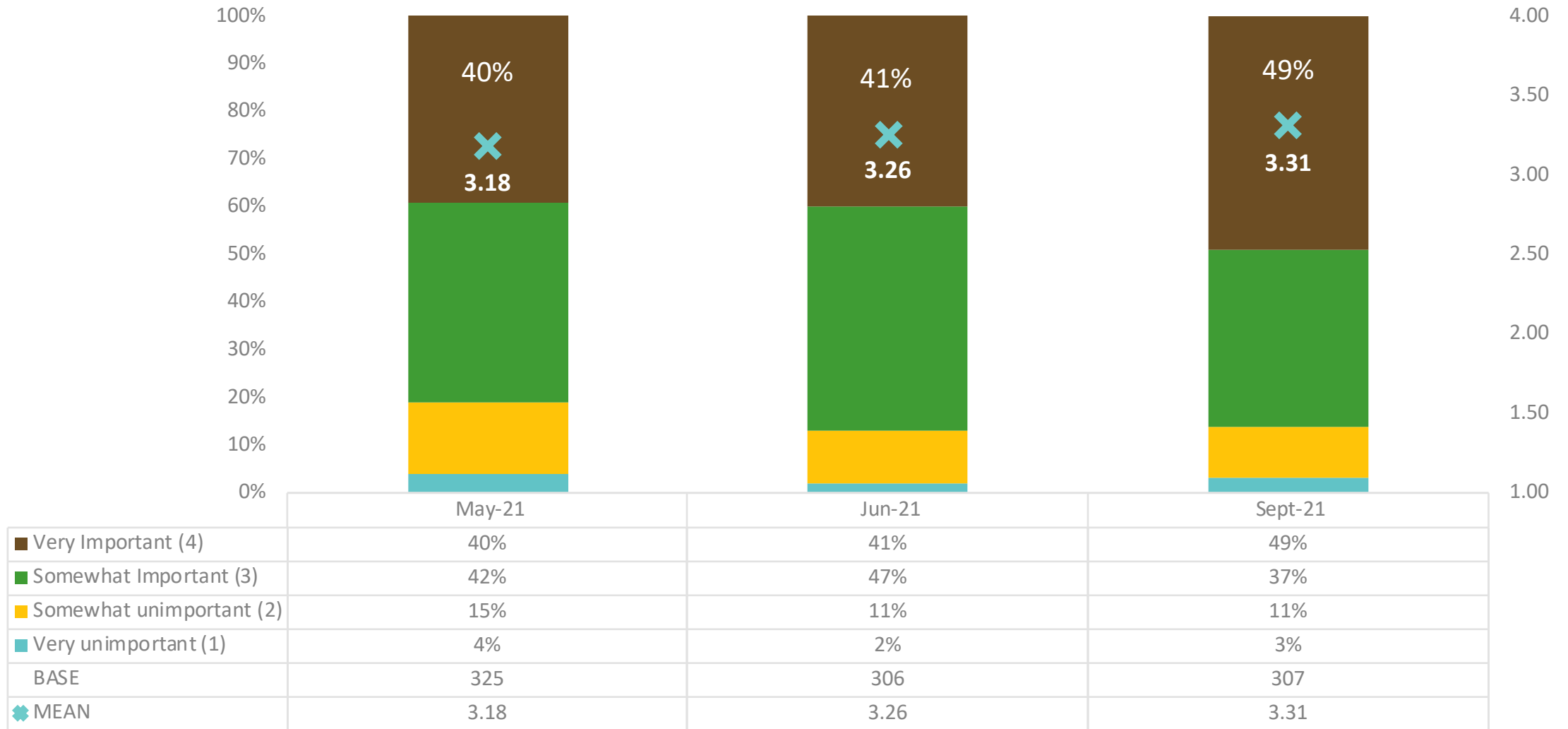
I consider health risks when traveling out of my own country



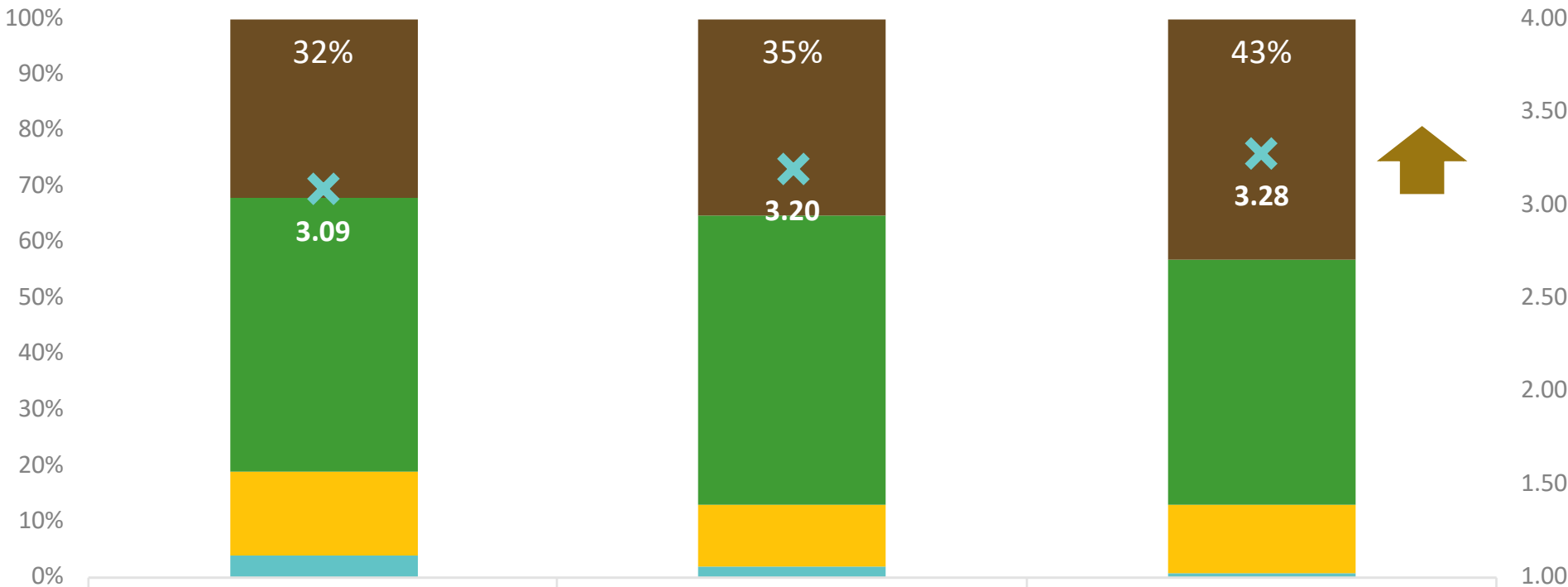
I would like to try a new food and local cuisine



I want to escape my everyday life



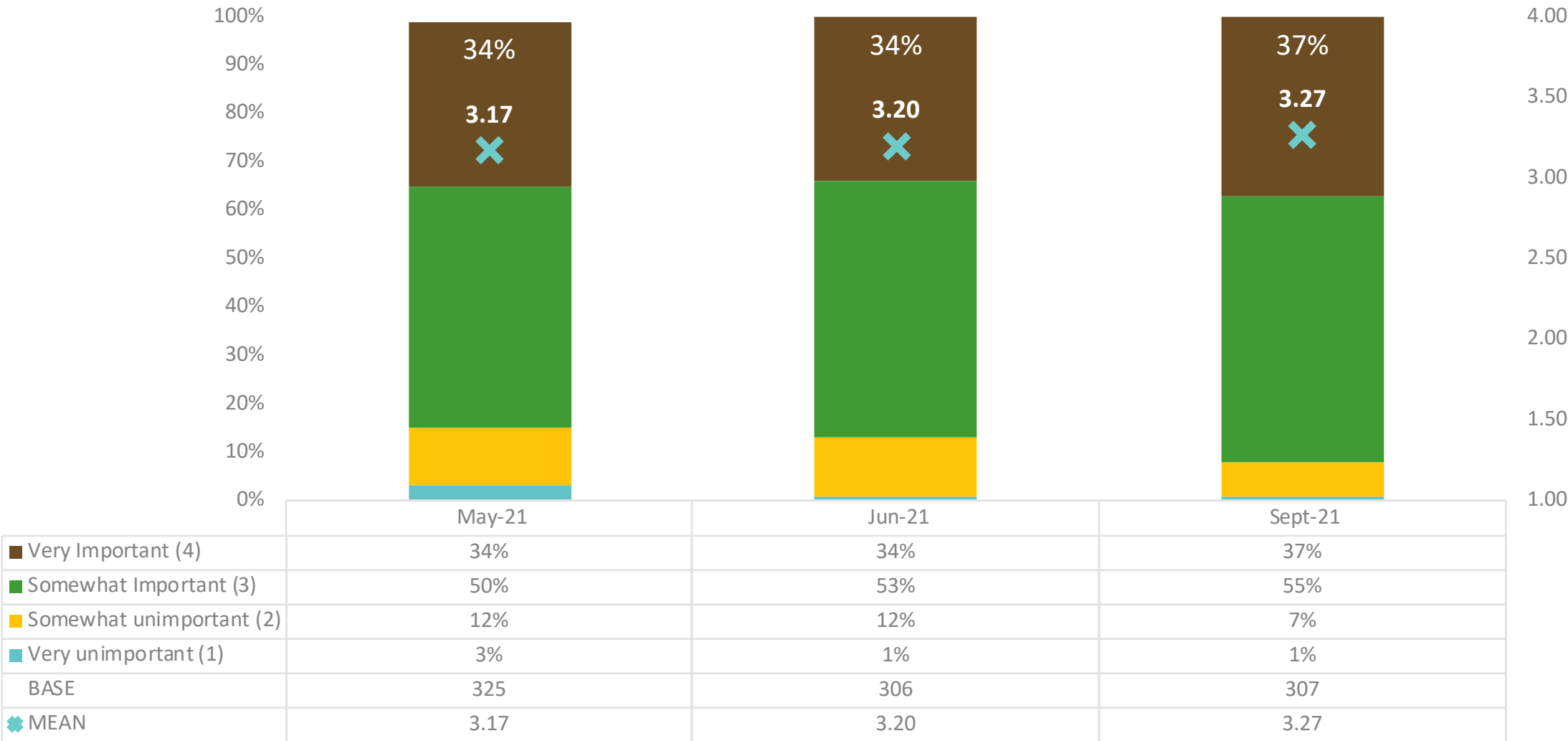
I would like to do something that I could not do in my daily life



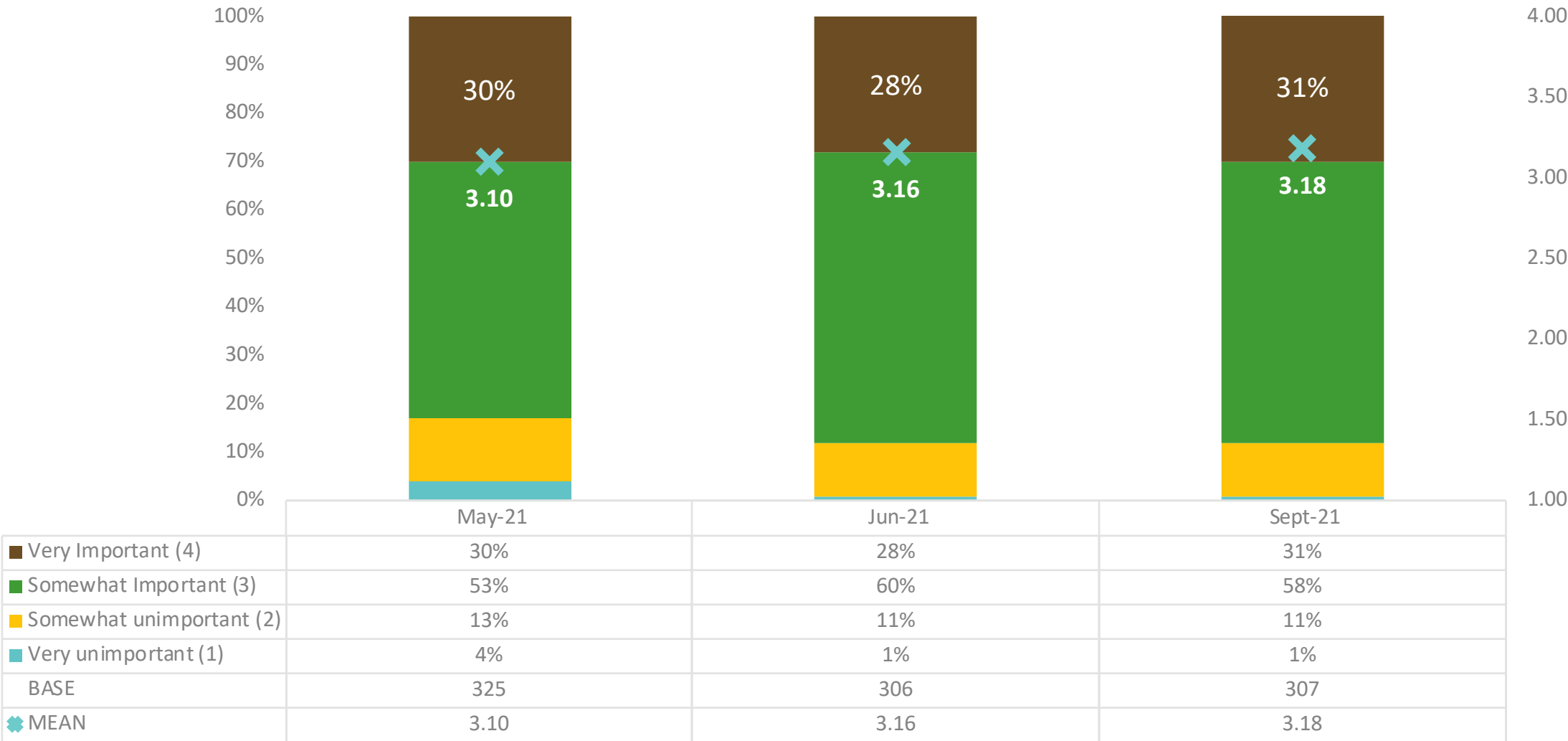
	May-21	Jun-21	Sept-21
Very Important (4)	32%	35%	43%
Somewhat Important (3)	49%	52%	44%
Somewhat unimportant (2)	15%	11%	12%
Very unimportant (1)	4%	2%	1%
BASE	325	306	307
MEAN	3.09	3.20	3.28



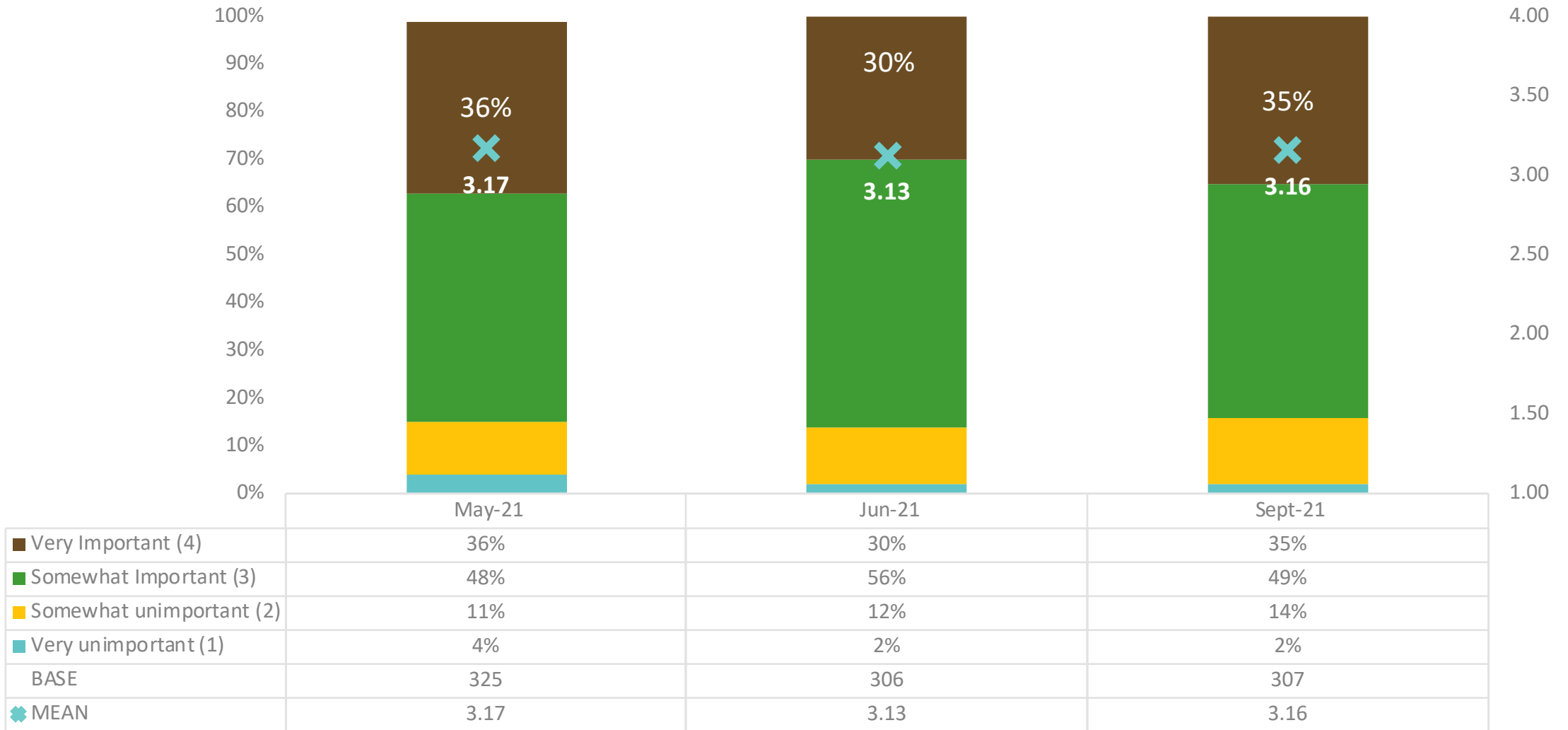
Cleanliness is important when choosing a destination



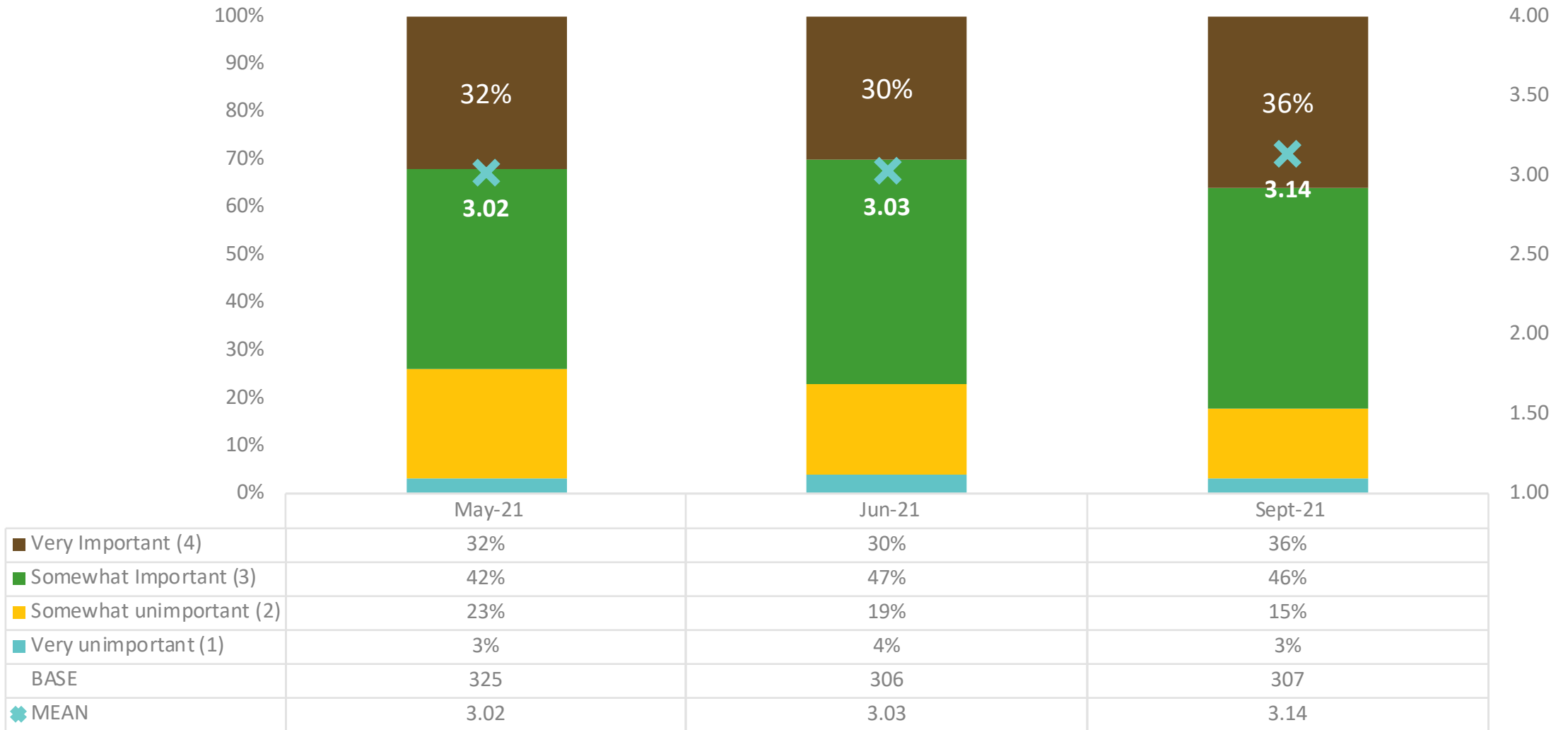
I would like to increase my knowledge about places, people, culture, and things of the destination



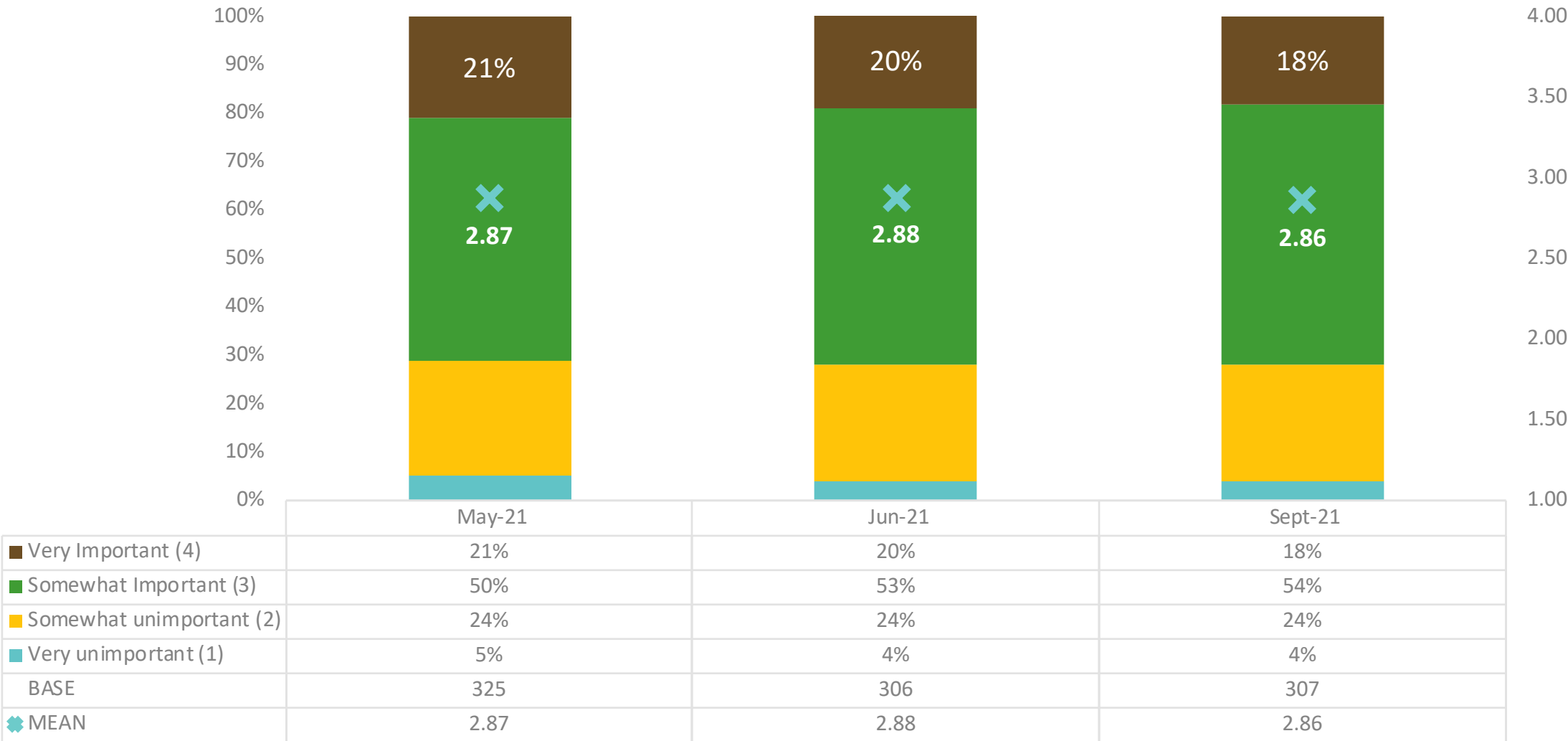
I enjoy sightseeing and tours during my vacation



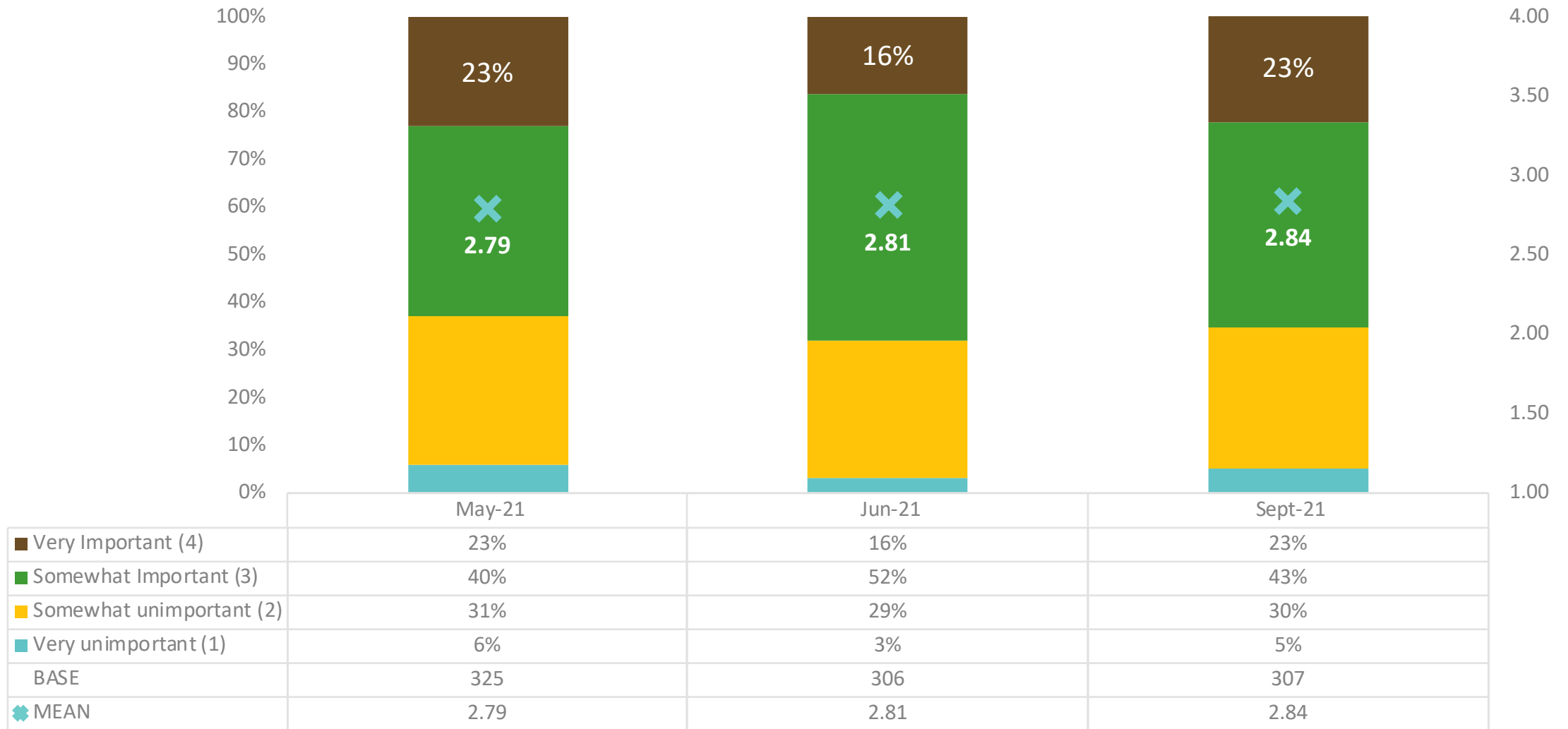
I am interested in shopping



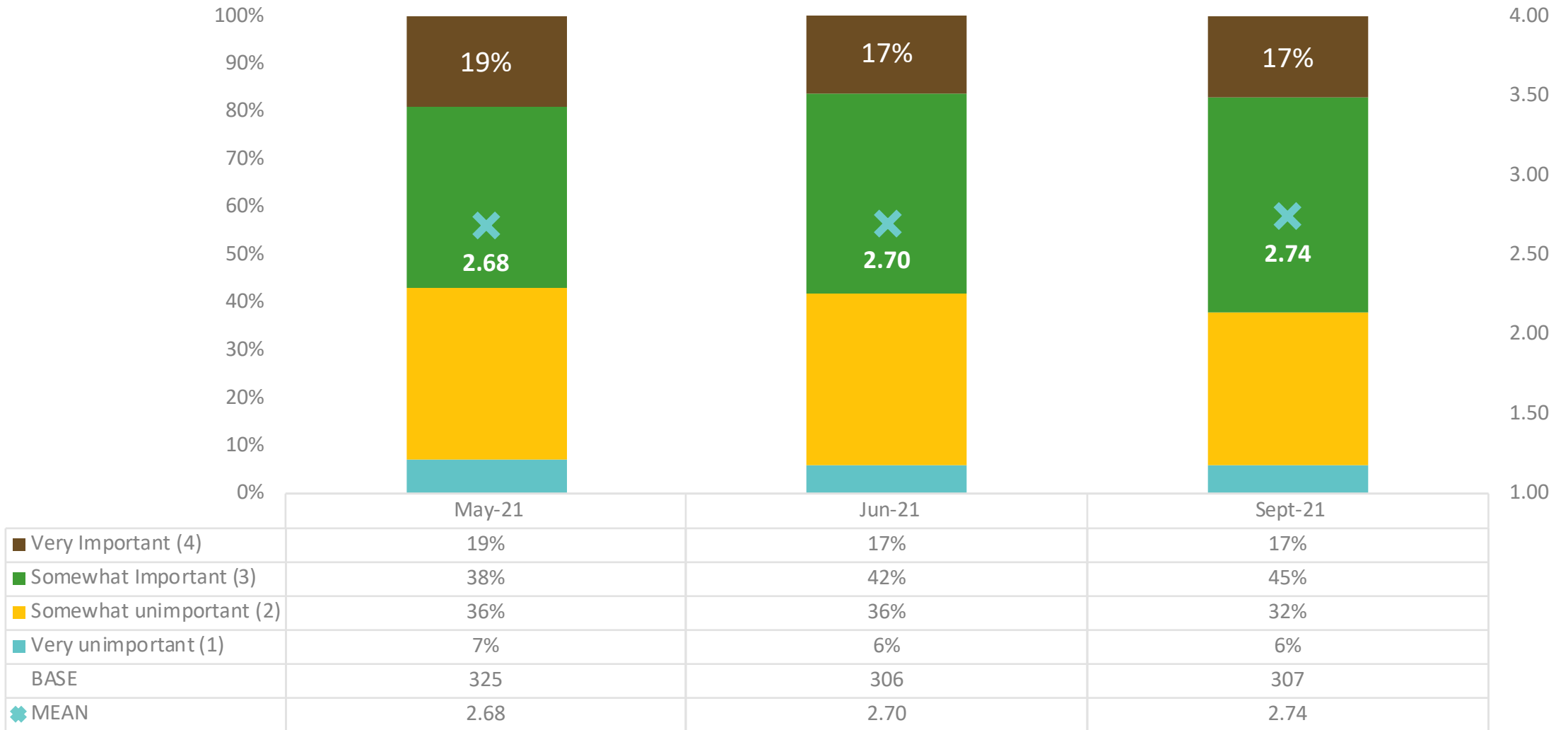
I like visiting destinations that most people value and appreciate



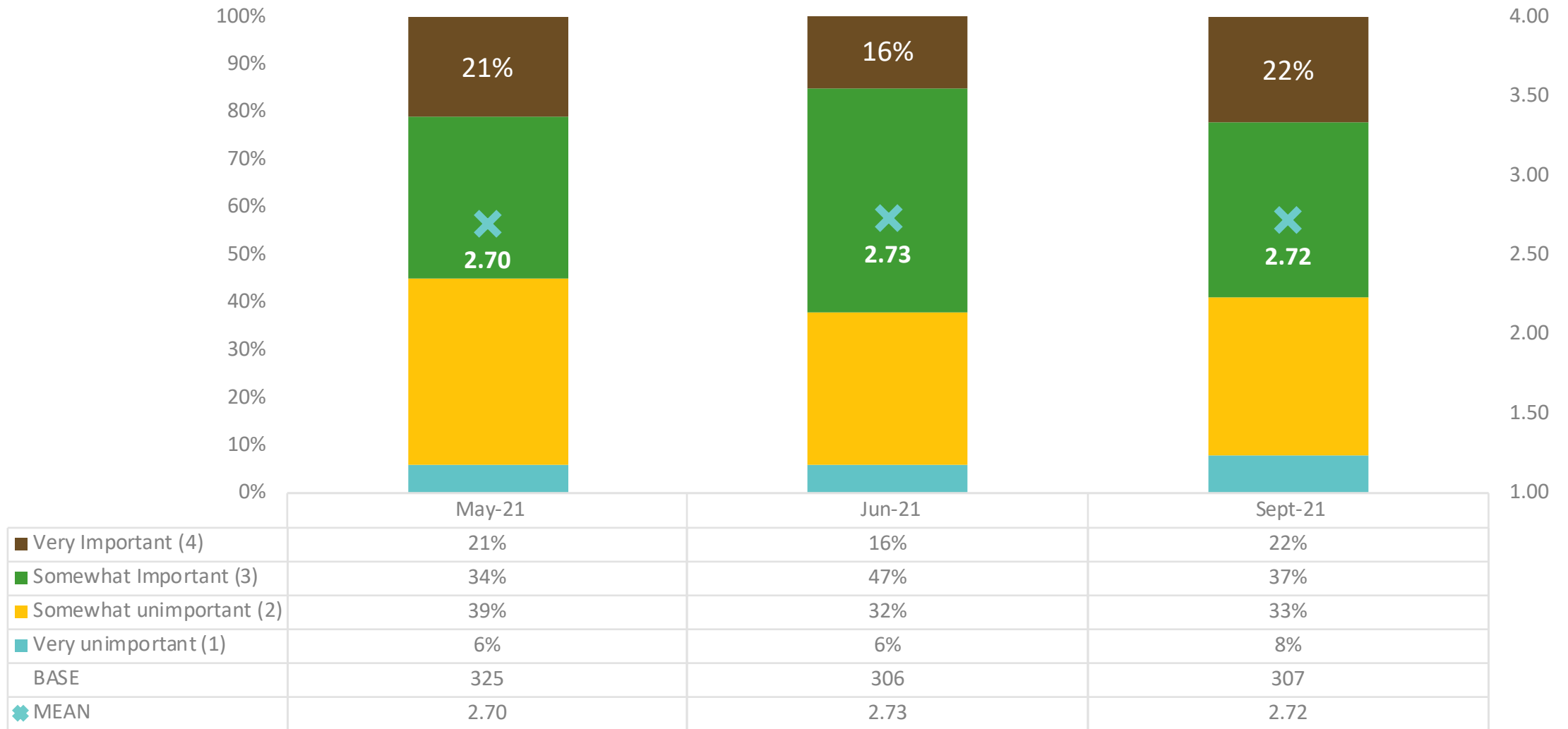
I want to take part in nature-based activities



I would like to meet new and interesting people

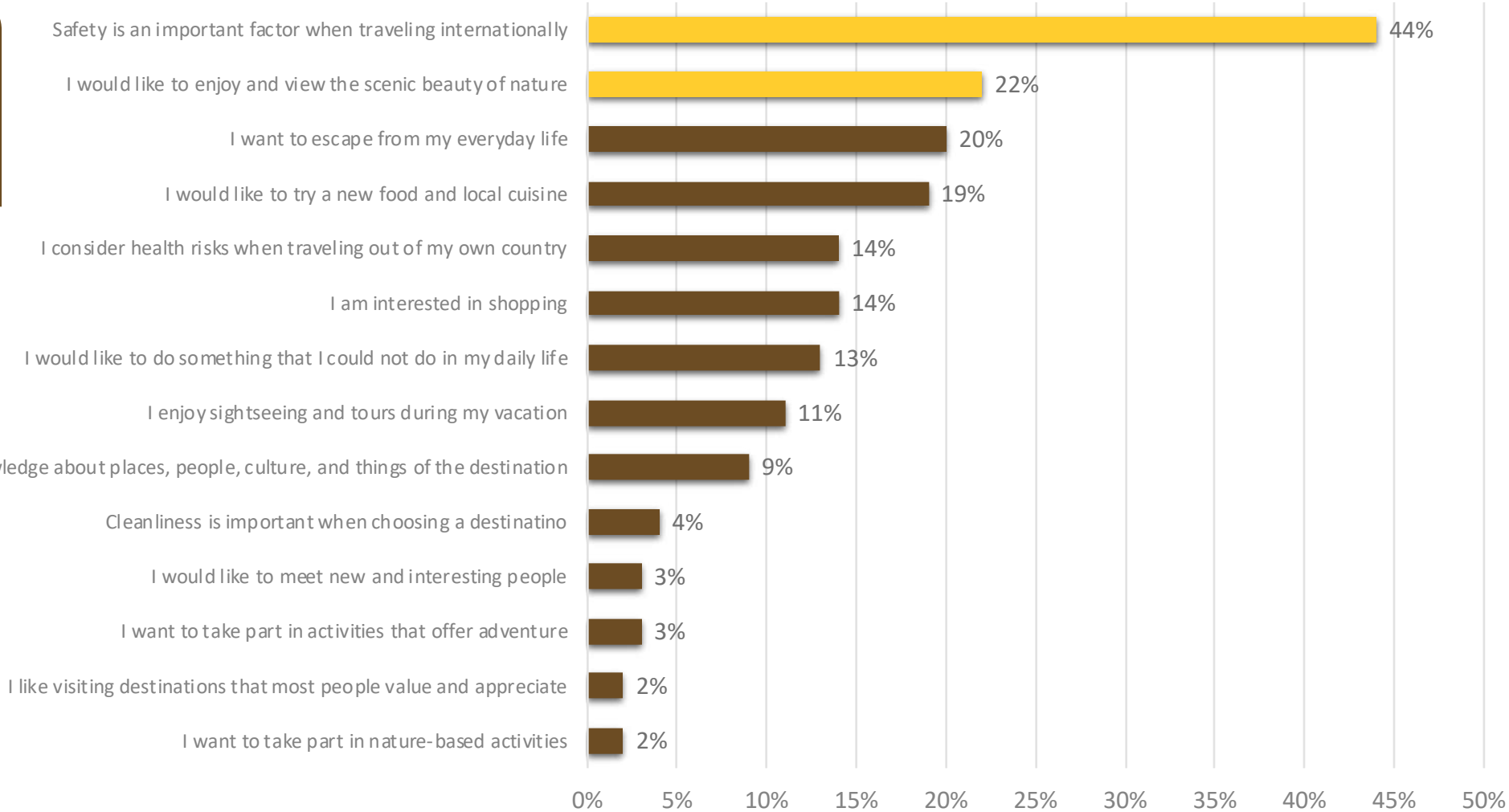


I want to take part in activities that offer adventure



DESTINATION SELECTION FACTORS – TOP TWO

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



Base
n=280



DESTINATION SELECTION FACTORS – TOP TWO

	May 2021	June 2021	Sept 2021
BASE	278	267	280
<i>Safety is an important factor when travelling internationally</i>	46%	40%	44%
<i>I would like to enjoy and view the scenic beauty of nature</i>	19%	21%	22%
<i>I want to escape from my everyday life</i>	13%	12%	20%
<i>I would like to try a new food and local cuisine</i>	15%	21%	19%
<i>I consider health risks when travelling out of my own country</i>	14%	13%	14%
<i>I am interested in shopping</i>	10%	12%	14%
<i>I would like to do something that I could not do in my daily life</i>	8%	12%	13%
<i>I enjoy sightseeing and tours during my vacation</i>	11%	9%	11%
<i>I would like to increase my knowledge about places, people, culture, and things of the destination</i>	9%	11%	9%
<i>Cleanliness is important when choosing a destination</i>	10%	6%	4%
<i>I would like to meet new and interesting people</i>	4%	3%	3%
<i>I want to take part in activities that offer adventure</i>	4%	2%	3%
<i>I like visiting destinations that most people value and appreciate</i>	5%	2%	2%
<i>I want to take part in nature-based activities</i>	3%	1%	2%





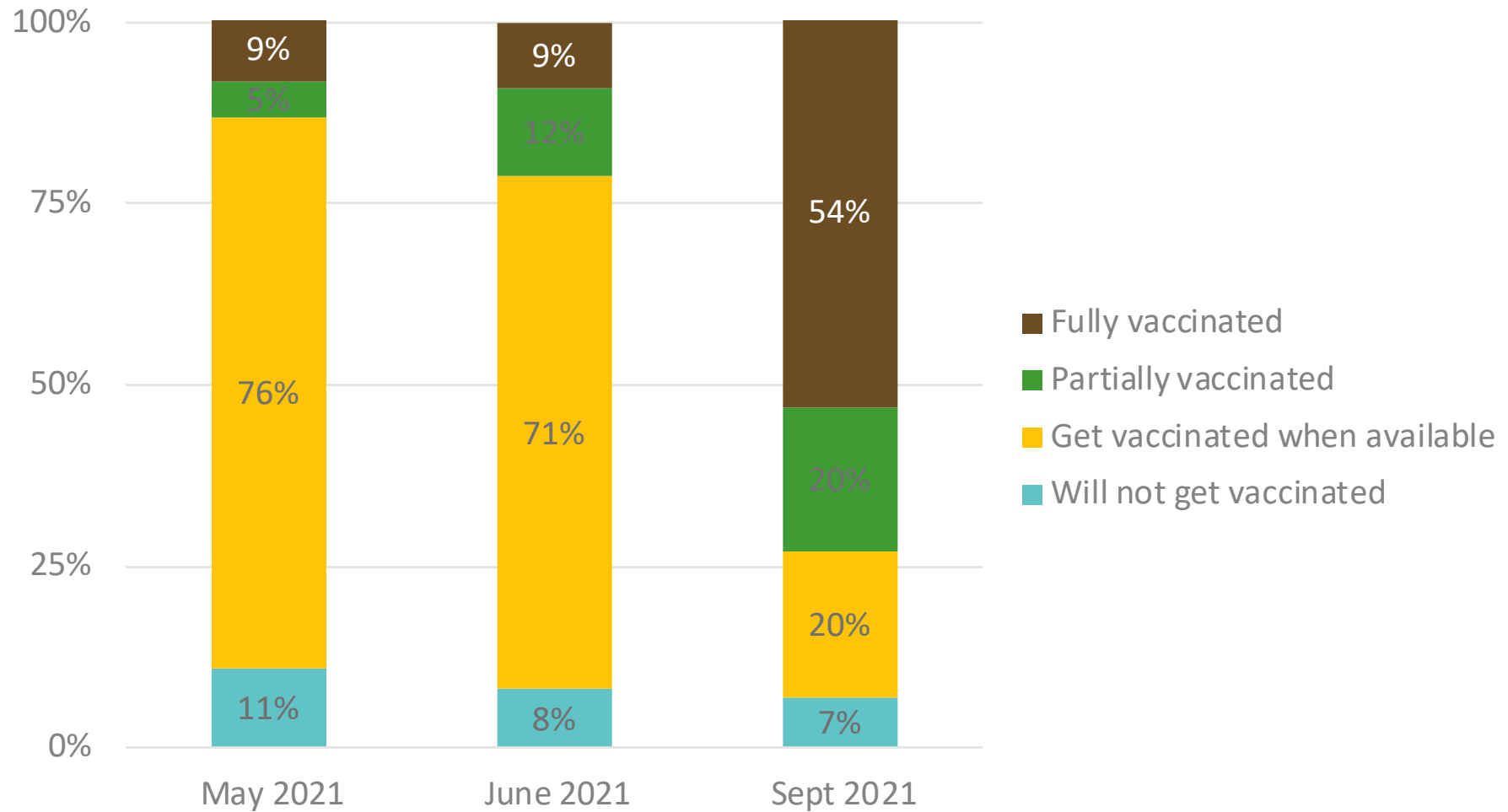
SECTION 2

COVID-19



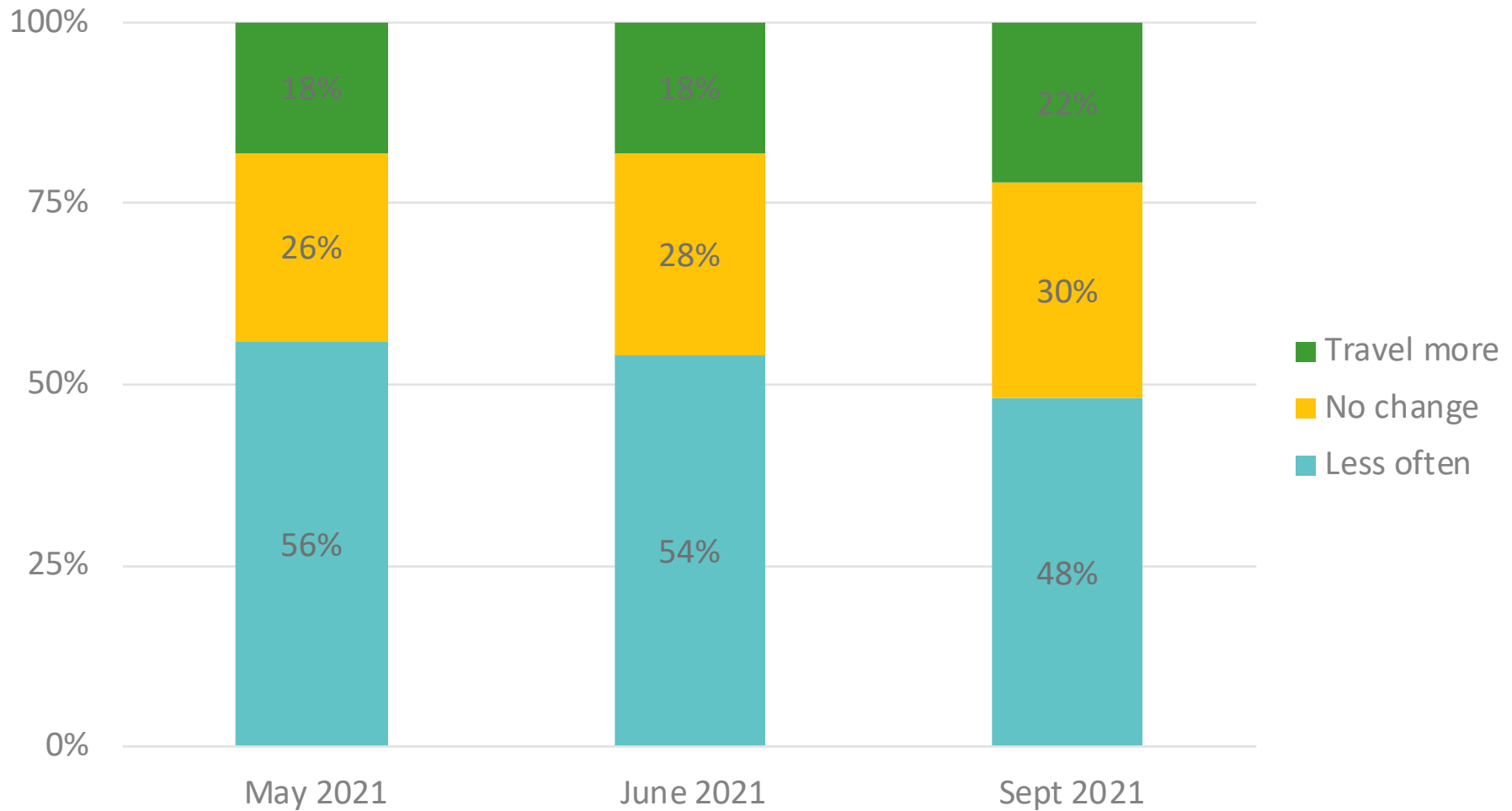
COVID-19 VACCINE STATUS

The proportion of respondents who are vaccinated is increasing, compared to June 2021.



POST-COVID TRAVEL

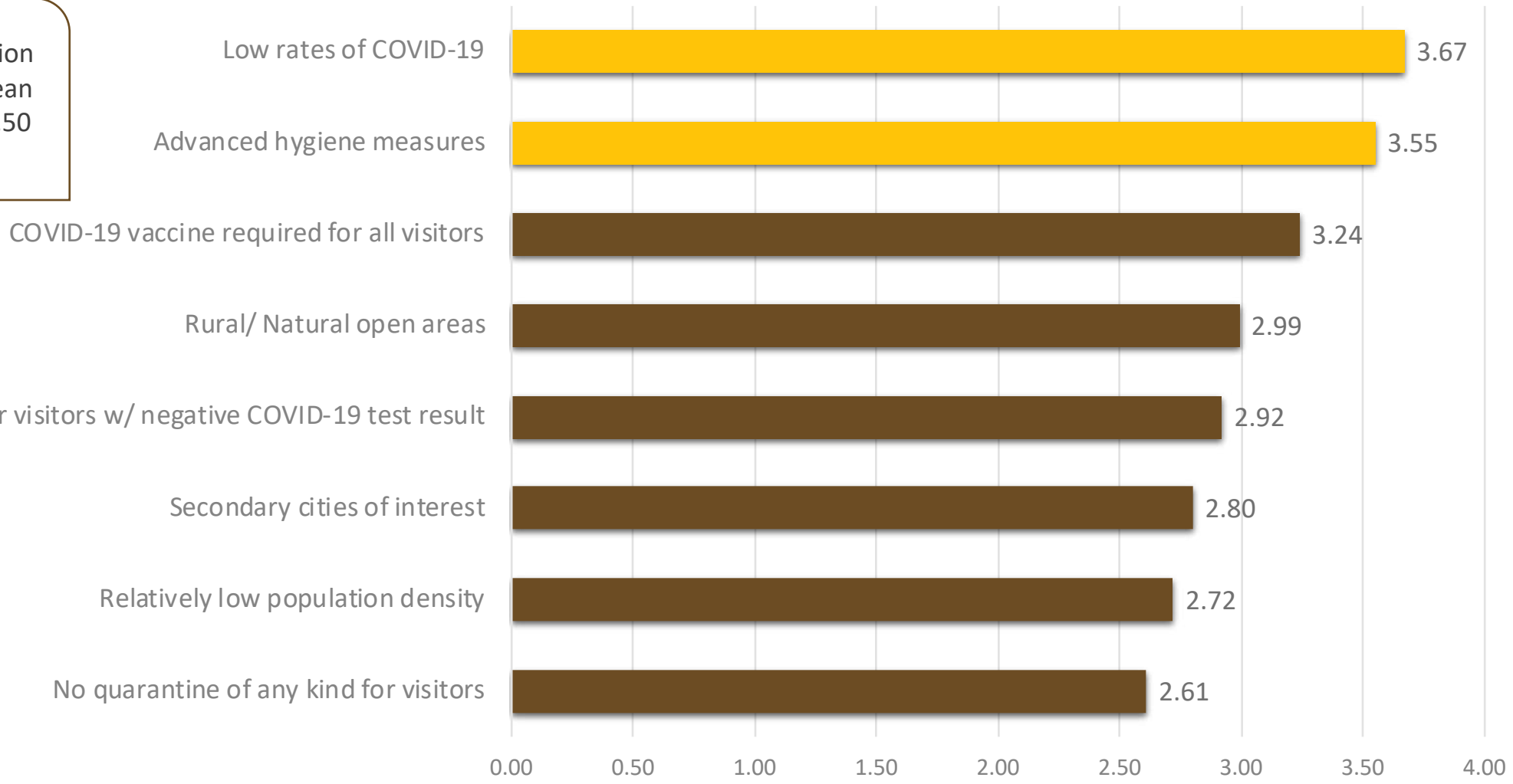
The Japanese travel market may take longer to recover fully.



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – MEAN SCORE

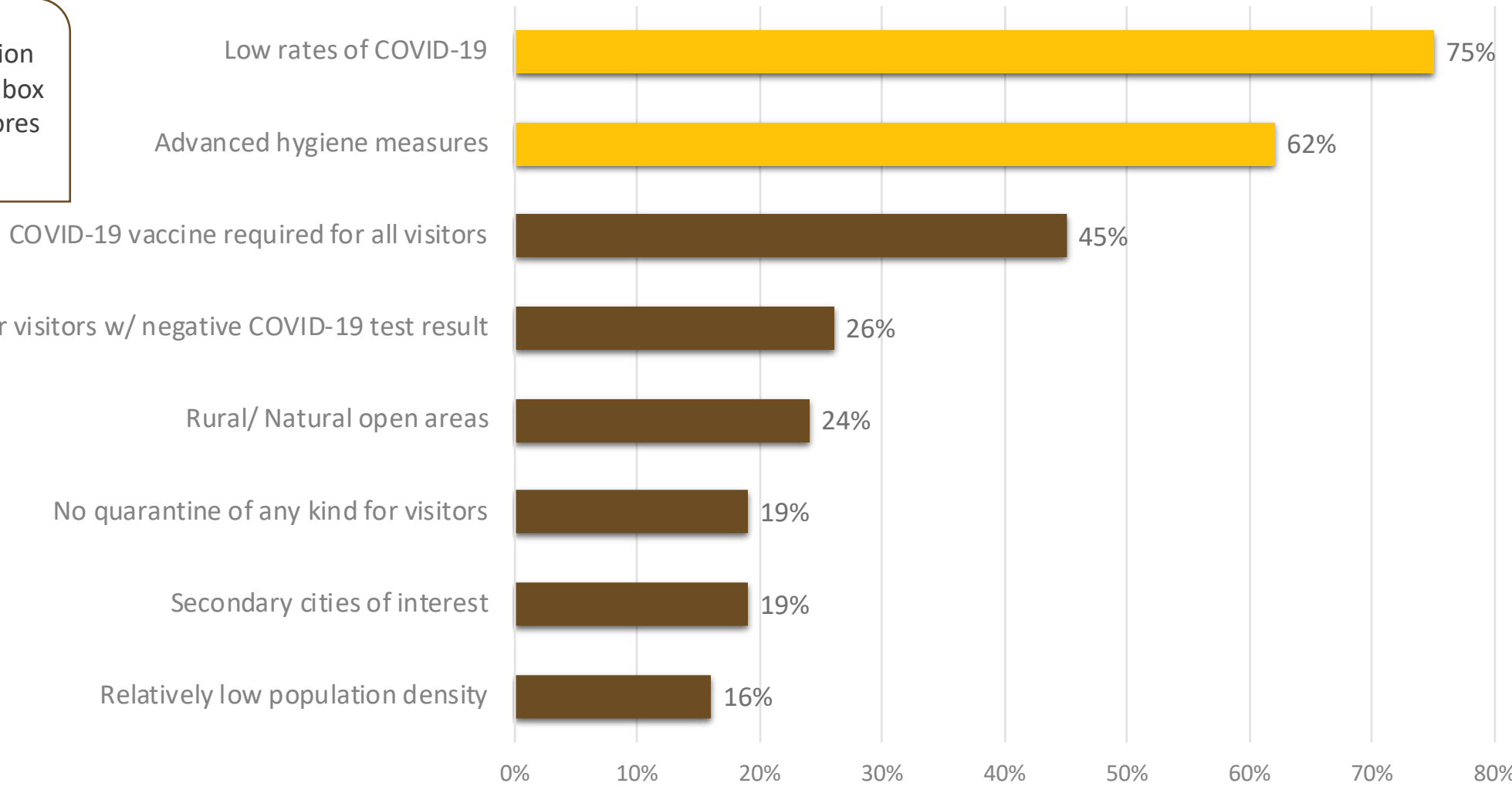
Two (yellow) selection factors received mean scores above the 3.50 threshold.



POST-COVID TRAVEL – IMPORTANCE

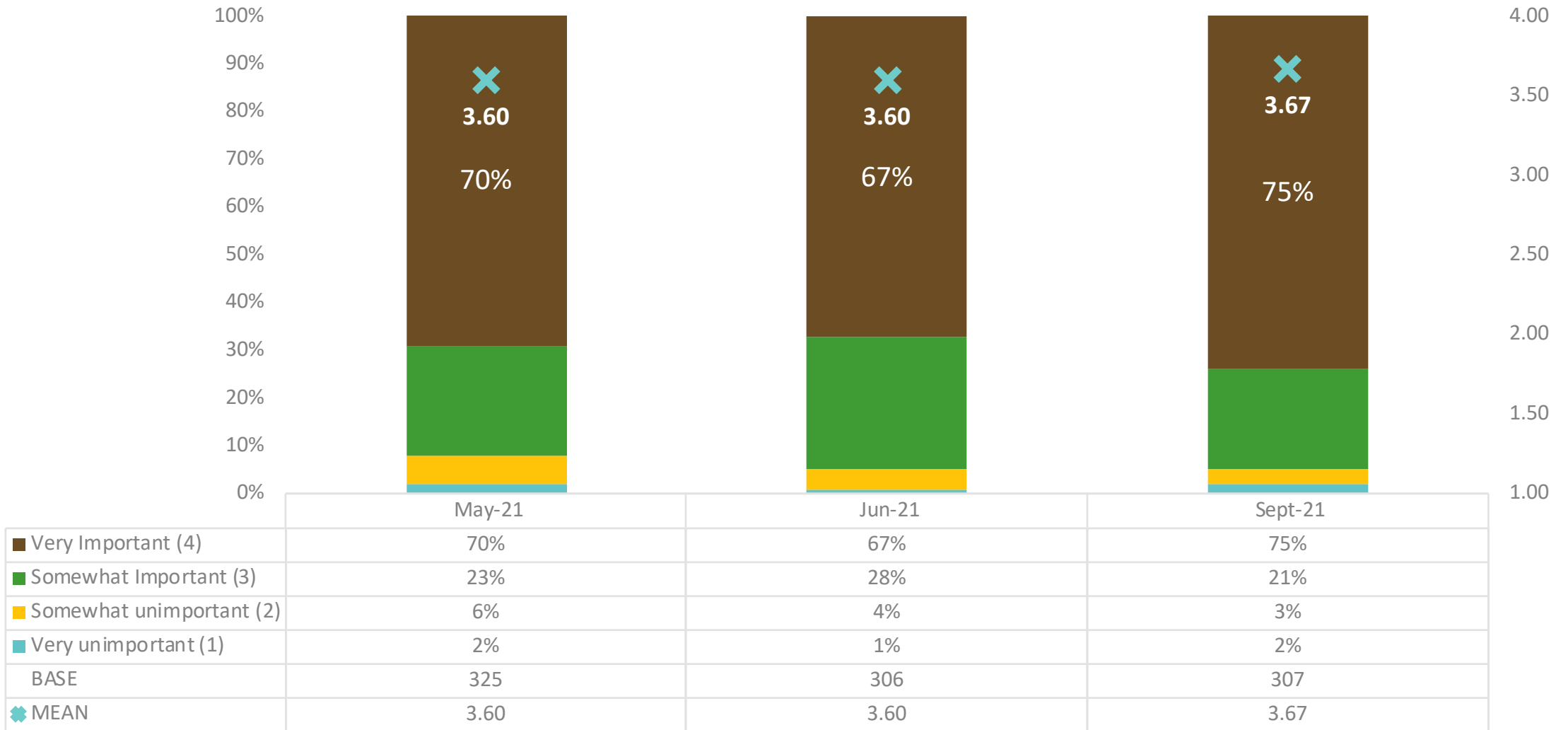
4PT RATING SCALE – TOP BOX (VERY IMPORTANT)

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



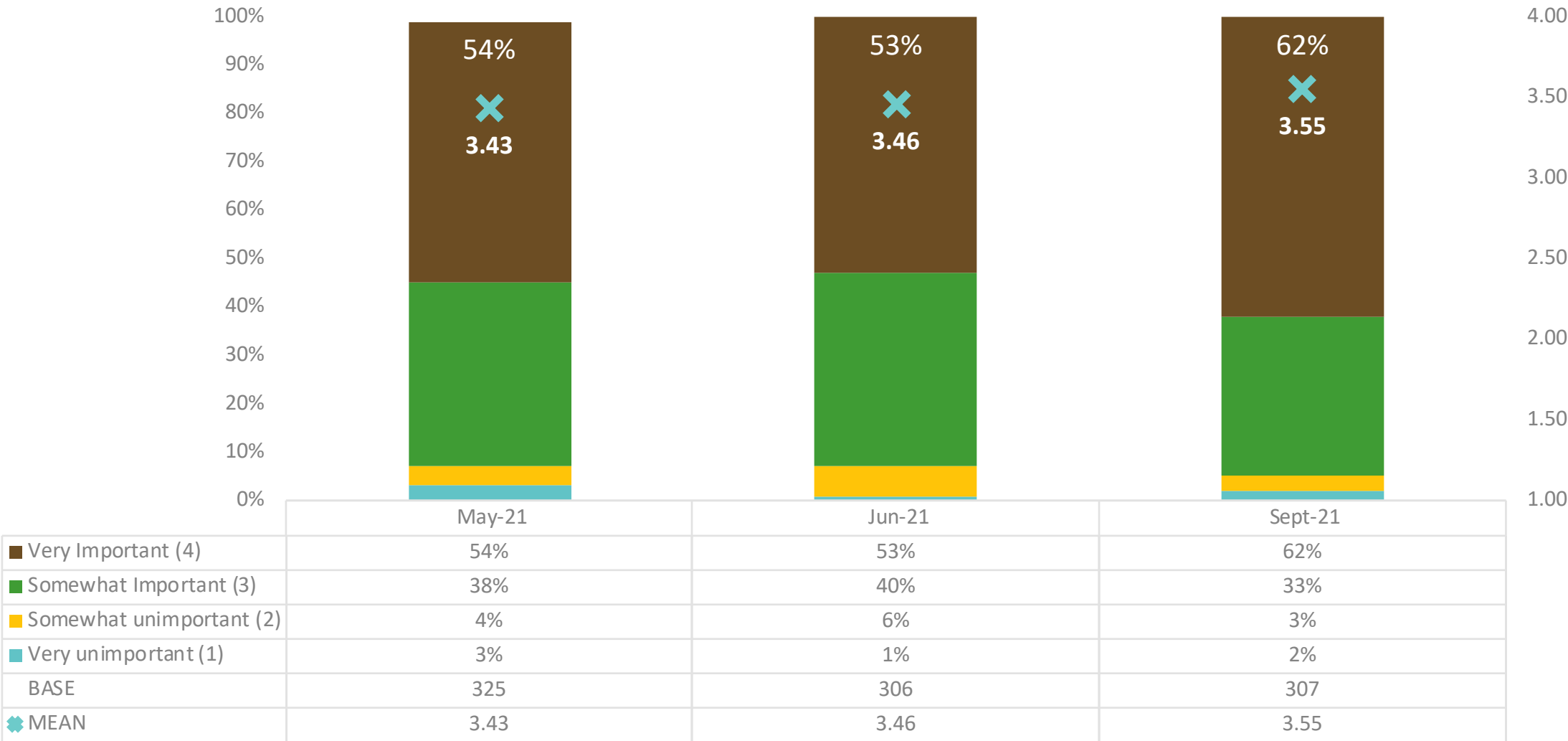
POST-COVID SELECTION FACTOR

Low rates of COVID-19



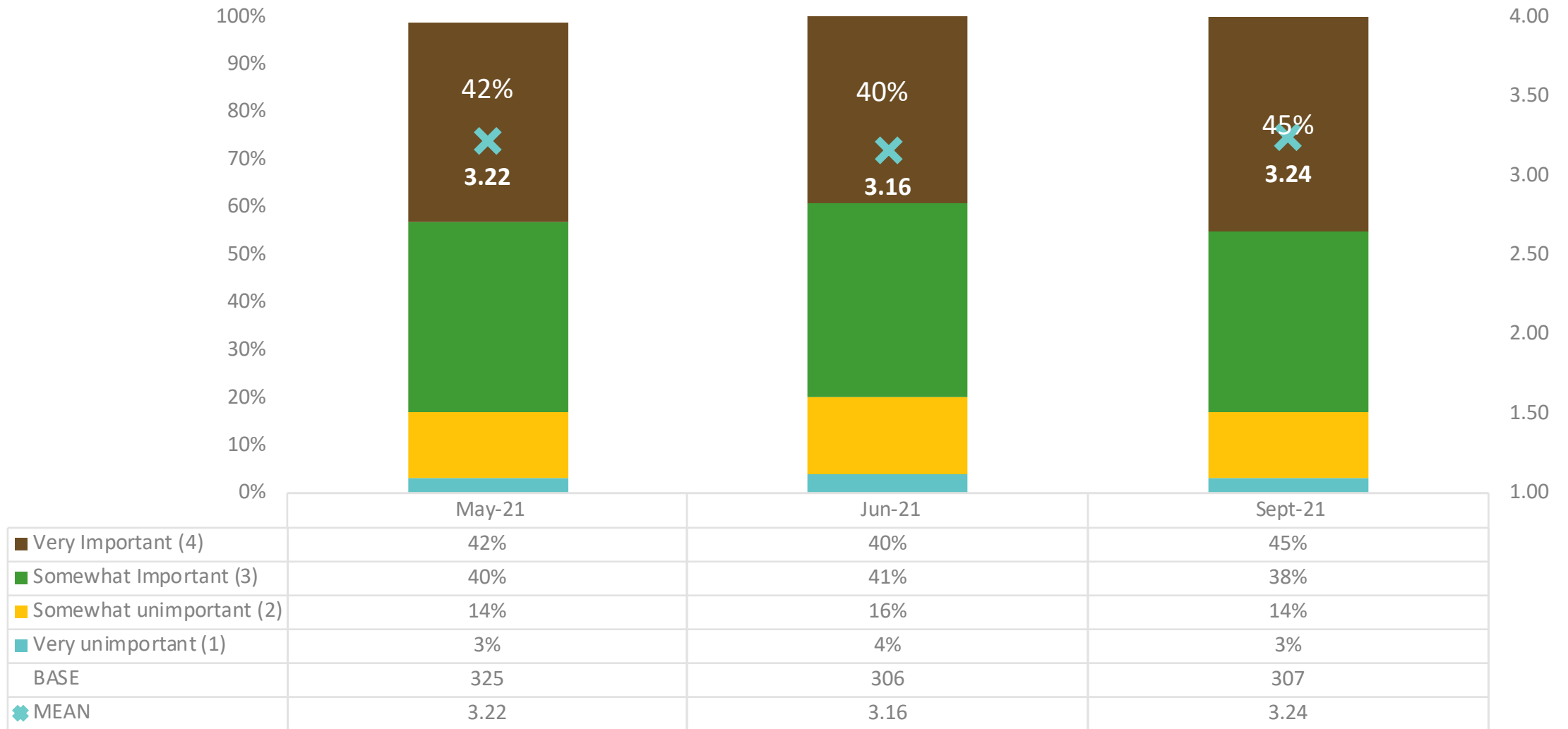
POST-COVID SELECTION FACTOR

Advanced hygiene measures



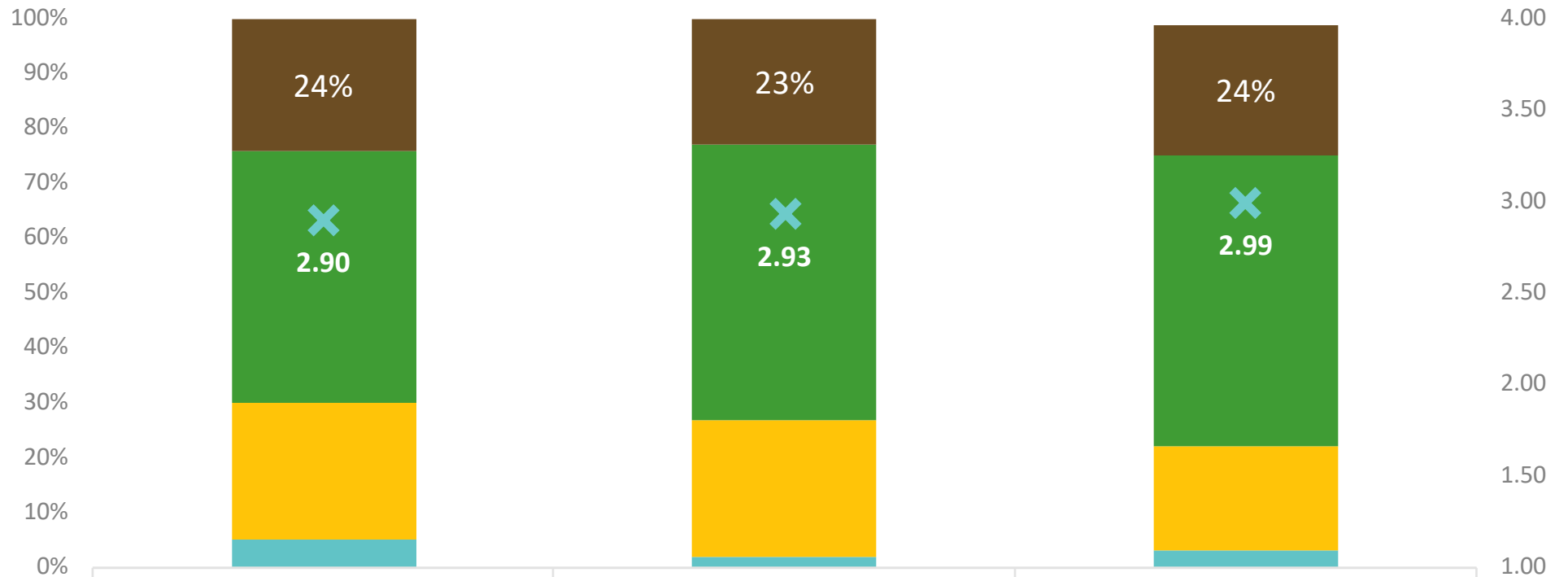
POST-COVID SELECTION FACTOR

COVID-19 vaccine required for all visitors



POST-COVID SELECTION FACTOR

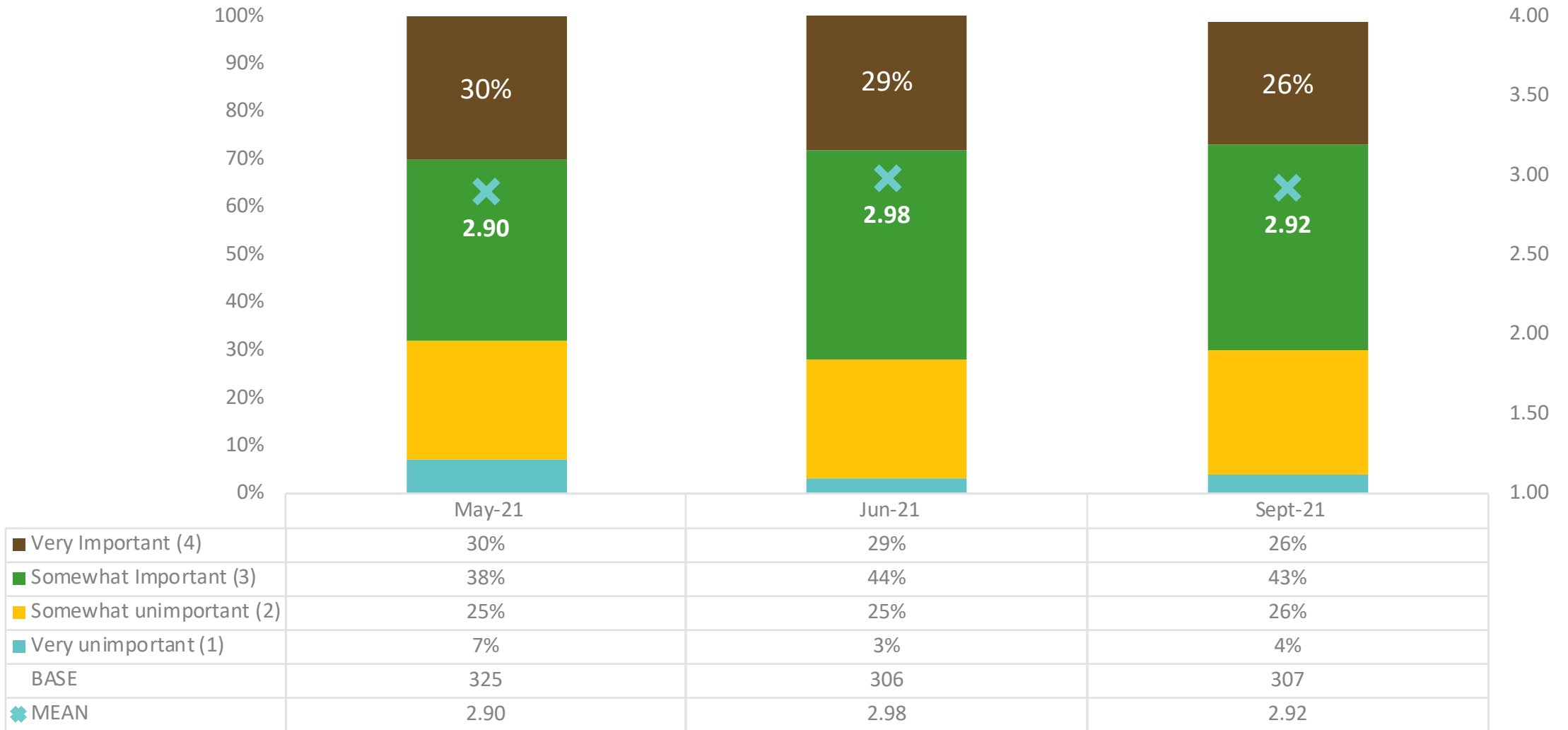
Rural/ natural open areas



	May-21	Jun-21	Sept-21
Very Important (4)	24%	23%	24%
Somewhat Important (3)	46%	50%	53%
Somewhat unimportant (2)	25%	25%	19%
Very unimportant (1)	5%	2%	3%
BASE	325	306	307
MEAN	2.90	2.93	2.99

POST-COVID SELECTION FACTOR

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



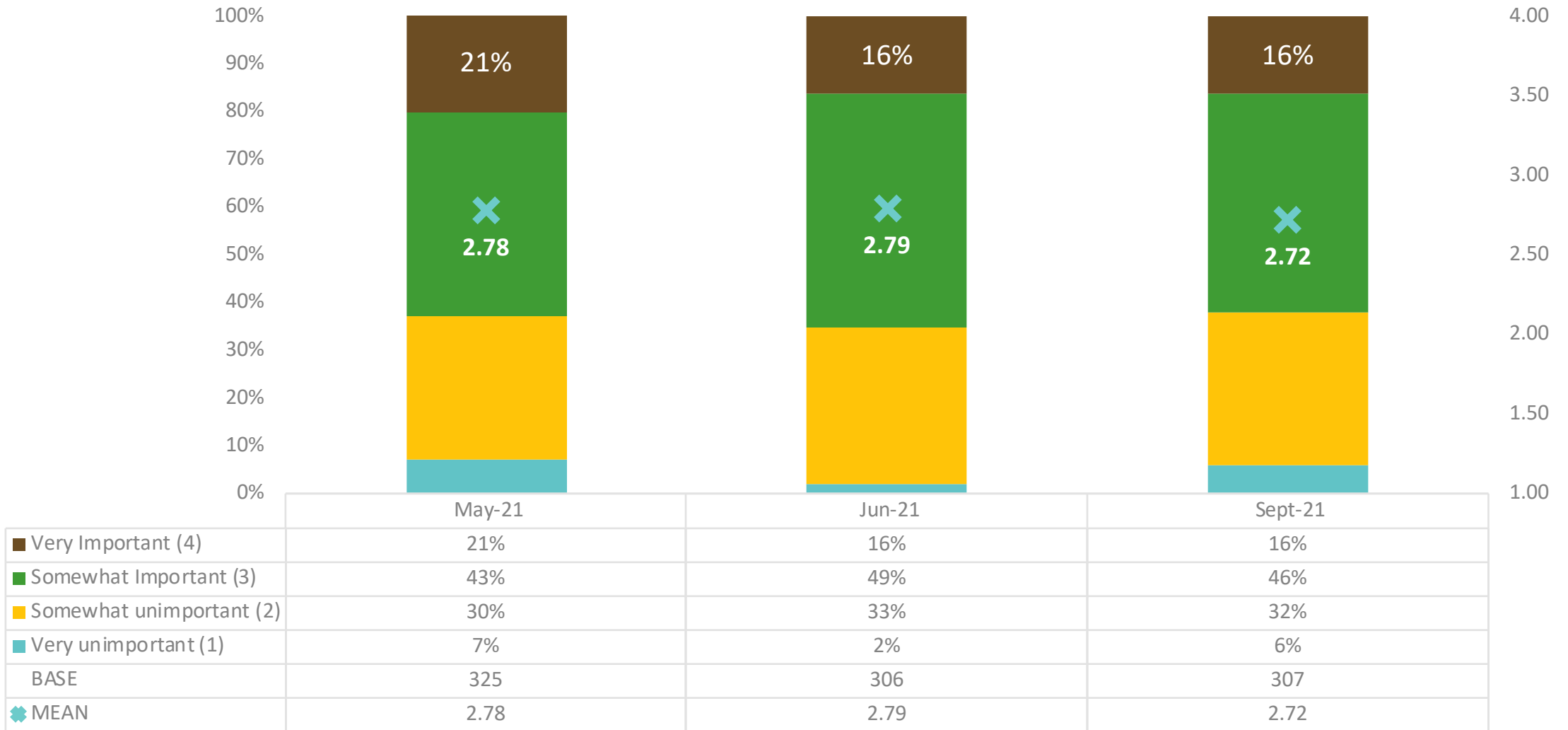
POST-COVID SELECTION FACTOR

Secondary cities of interest



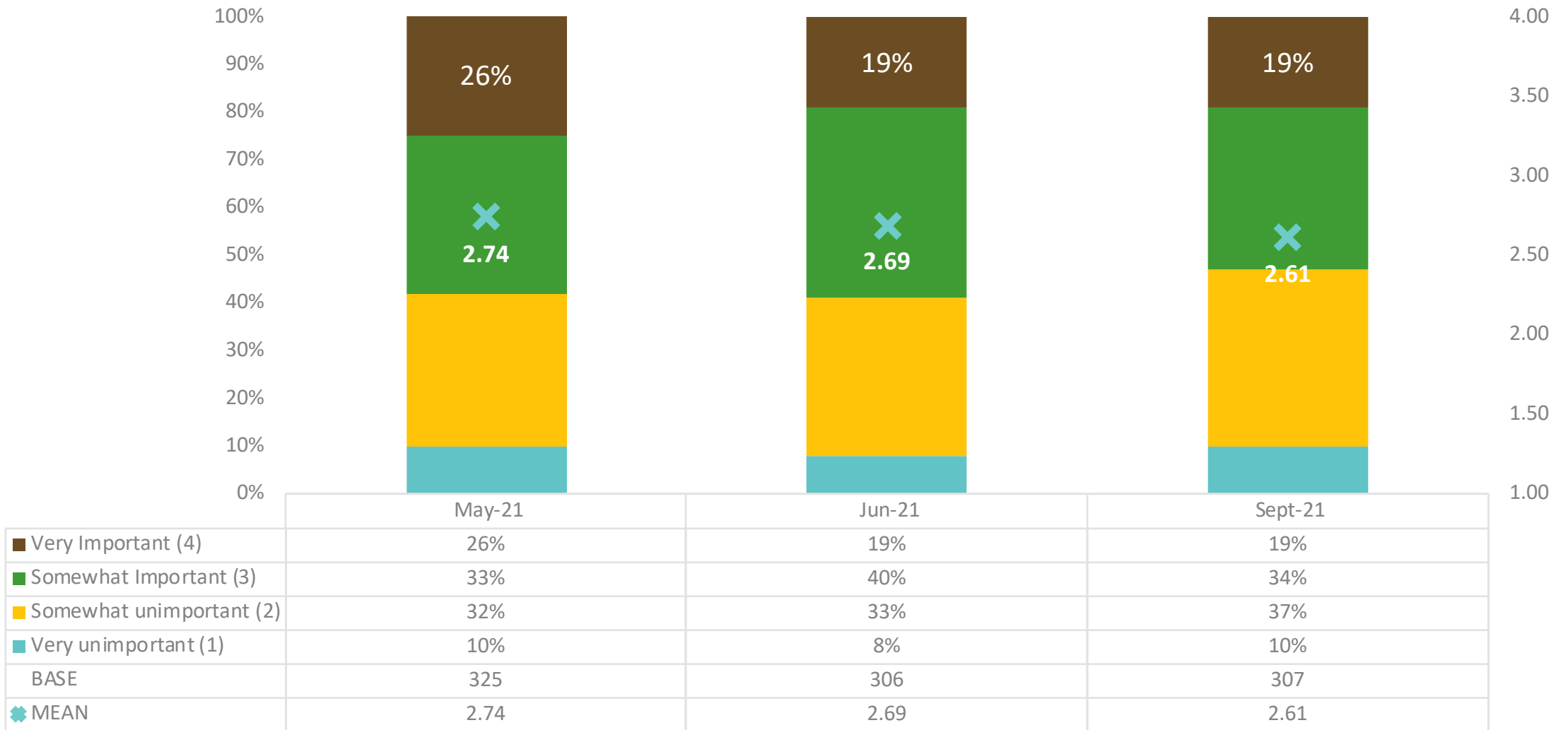
POST-COVID SELECTION FACTOR

Relatively low population density

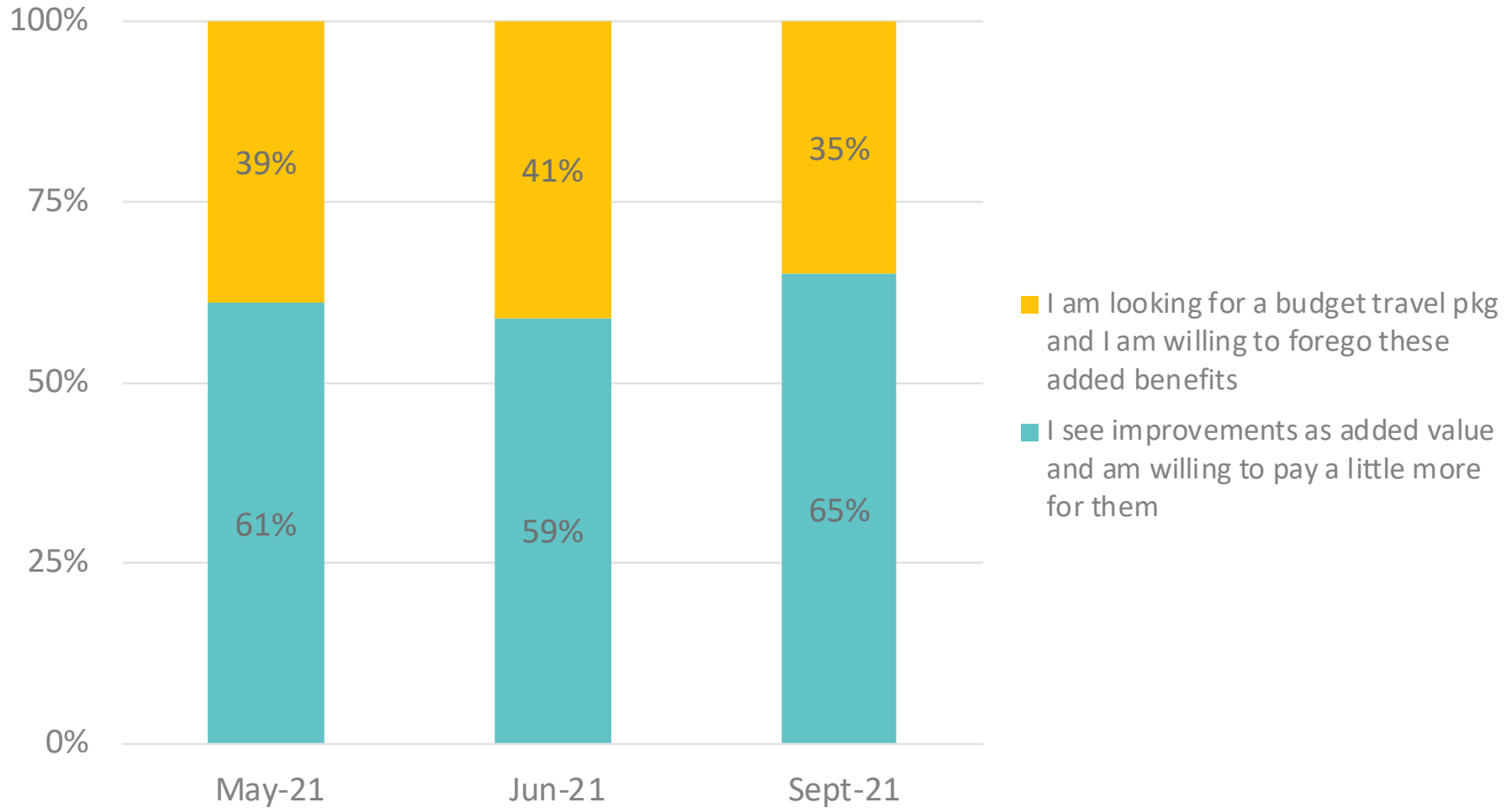


POST-COVID SELECTION FACTOR

No quarantine of any kind for visitors



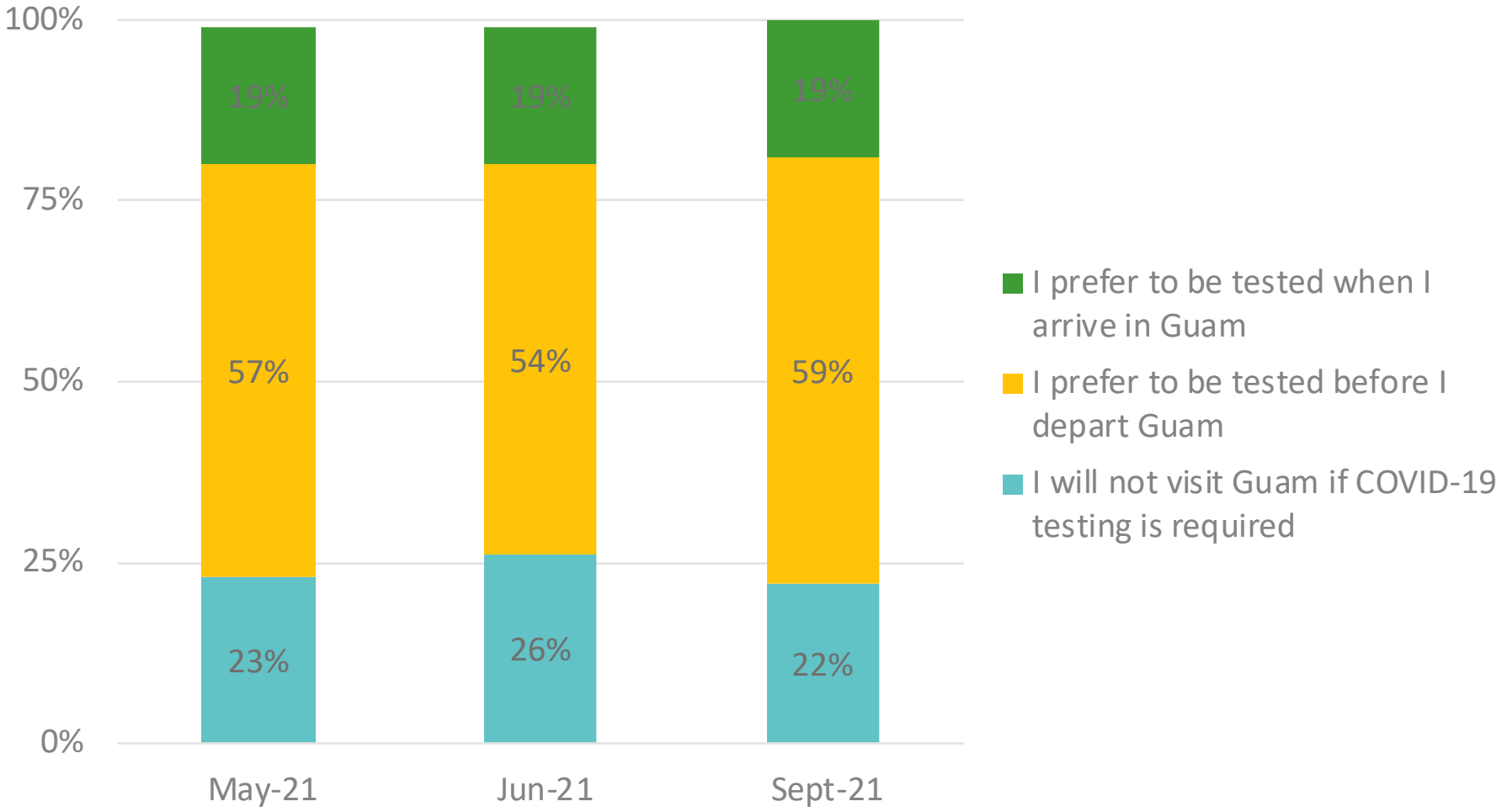
GUAM AIRPORT COVID-19 SAFETY MEASURES



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?



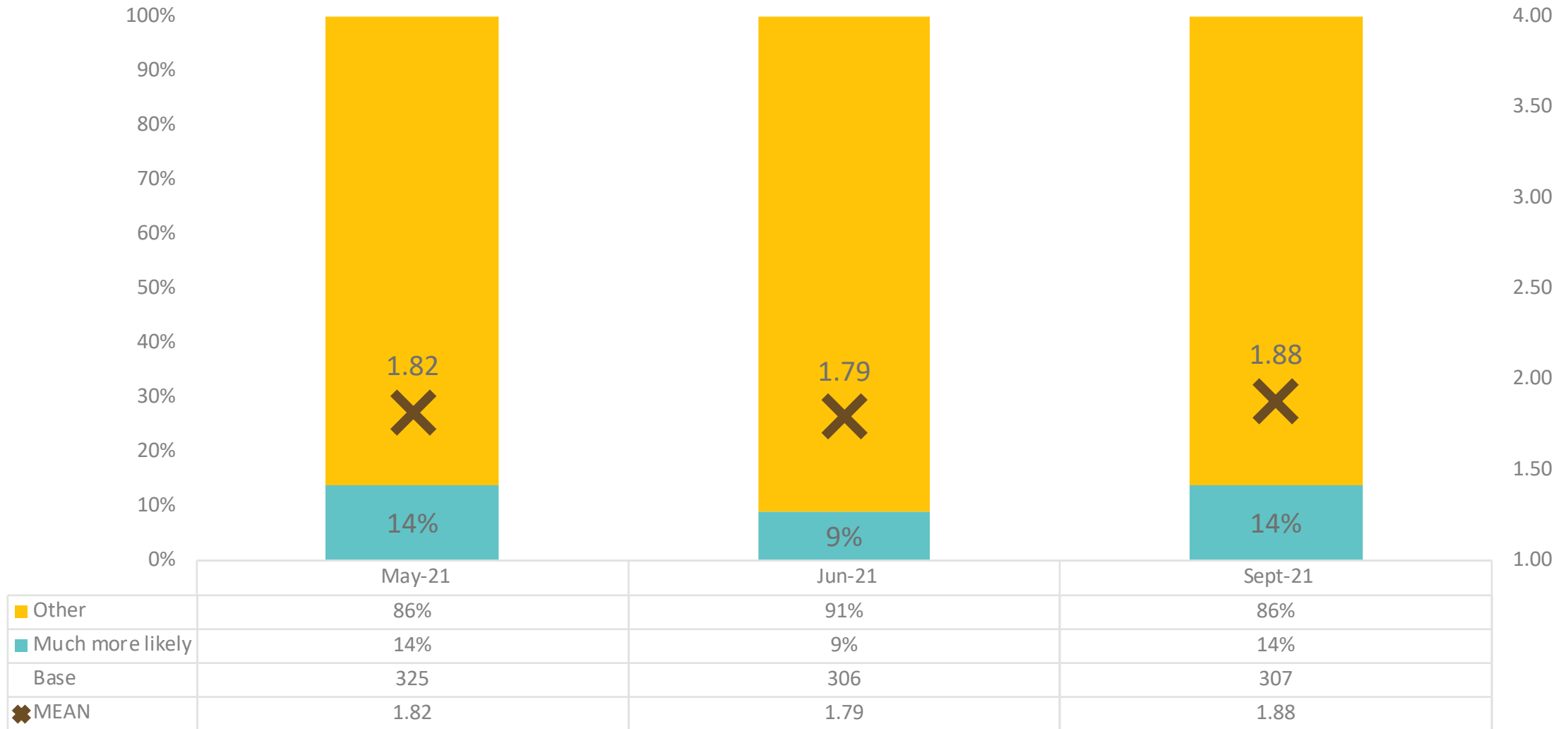
ON-ISLE COVID-19 TESTING PREFERENCE



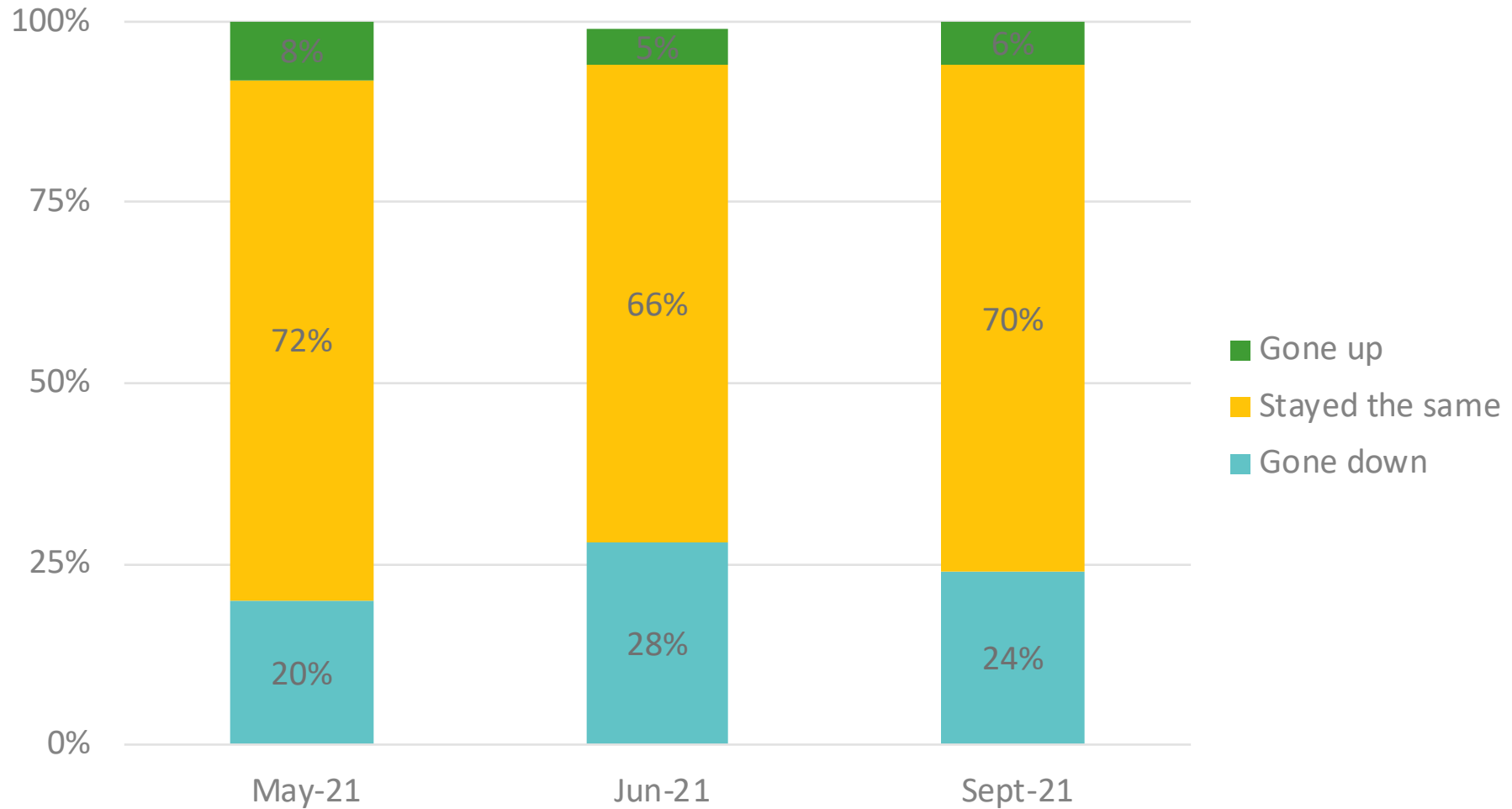
Q: If Guam were to require visitors to pay for COVID-19 testing on island, either upon arrival or before leaving, which would you prefer?



IMPACT ON TRAVEL – FDA APPROVED COVID TEST



CHANGES IN HOUSEHOLD INCOME DURING PANDEMIC



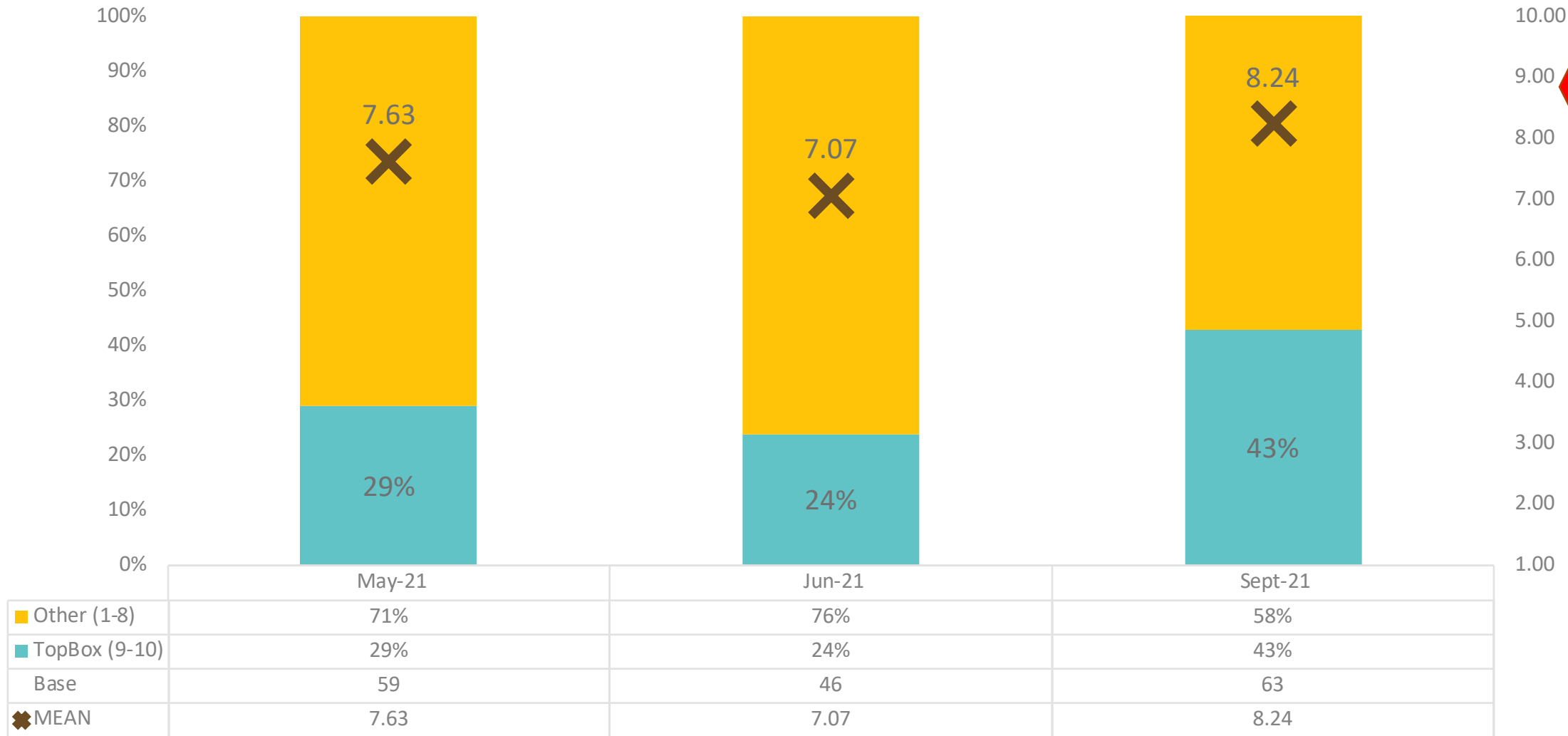


SECTION 3

VISITOR SATISFACTION



OVERALL SATISFACTION – 10PT SCALE



Caution
small
base

PRIMARY TRAVEL MOTIVATION

	May 2021	June 2021	Sept 2021
BASE	59	46	63
Vacation/ pleasure	76%	78%	73%
Honeymoon	7%	11%	8%
Organized sporting activity/ event	3%	2%	8%
Incentive trip	-	7%	6%
Get married/ attend wedding	7%	-	2%
Business/ conference/ convention/ trade show	3%	2%	2%
Visit friends/ family	3%	-	2%

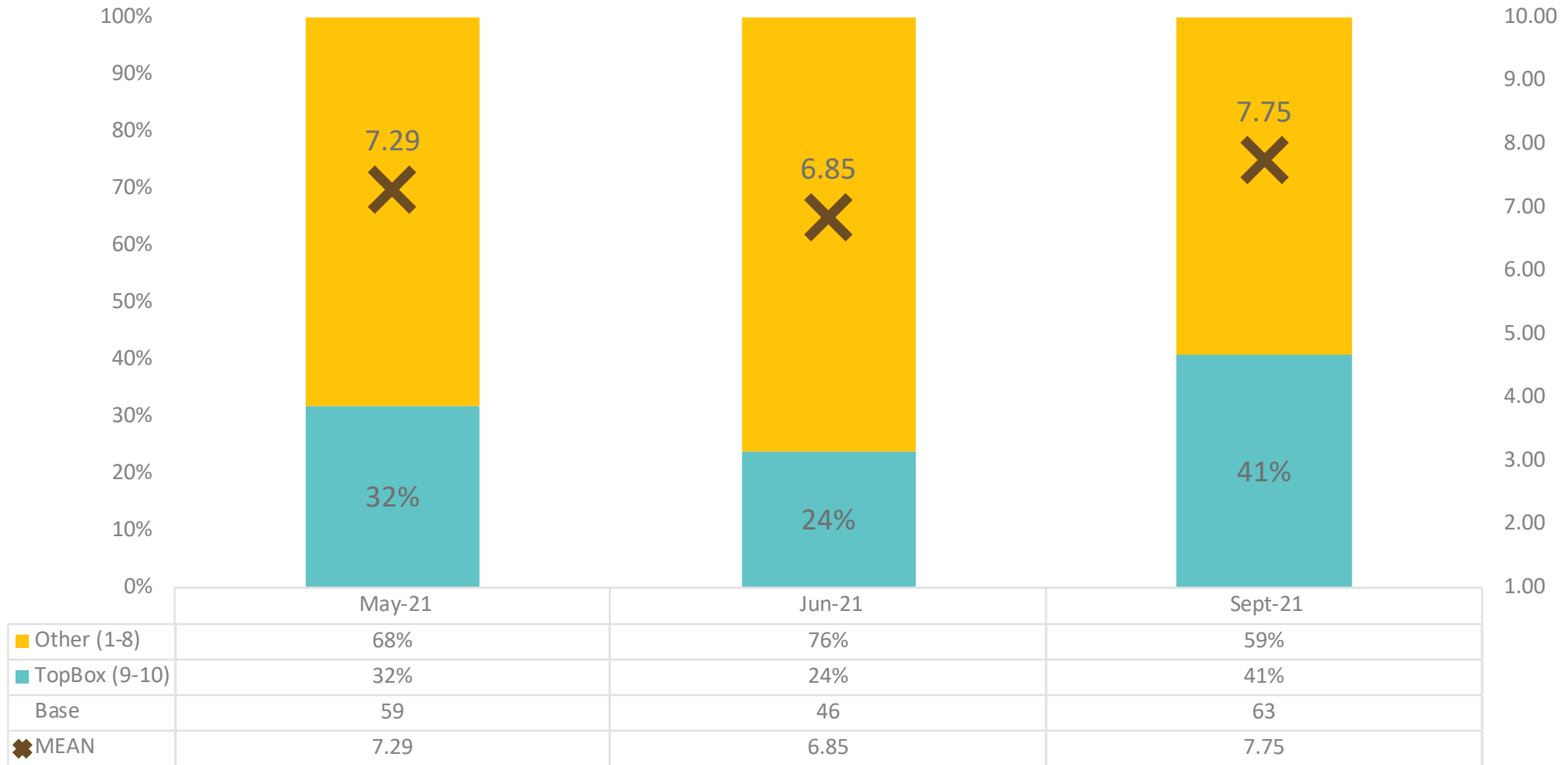


TRAVEL MOTIVATIONS – TOP 3

	May 2021	June 2021	Sept 2021
BASE	59	46	53
Beautiful seas, beaches, tropical climate	56%	48%	59%
Short travel time	37%	28%	40%
Safety	37%	28%	37%
Prior trip	25%	26%	35%
Sightseeing/ tourist spots	14%	13%	19%
Price	25%	35%	17%
Shopping	14%	13%	14%
Water sports	7%	20%	13%
Relaxation	10%	13%	10%



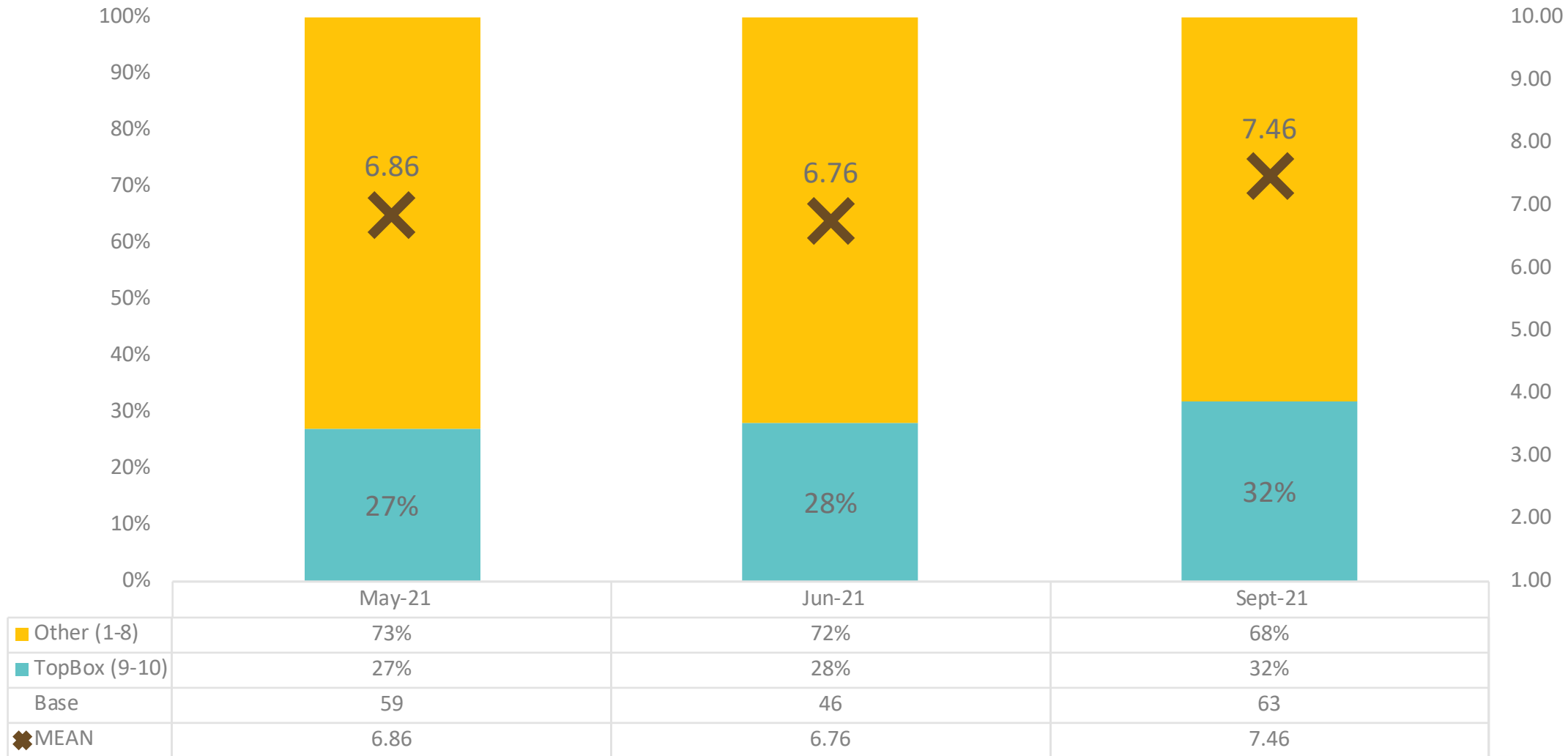
BRAND ADVOCACY – 10PT SCALE



Caution
small
base



BRAND LOYALTY – 10PT SCALE



Caution
small
base

GUAM TRAVELER – TRIP MOTIVATIONS

	May 2021	June 2021	Sept 2021
BASE	58	45	63
<i>Nature/ natural beauty/ scenery</i>	50%	31%	52%
<i>Beach/ ocean</i>	48%	31%	41%
<i>Safe environment</i>	33%	22%	40%
<i>Weather/ climate/ good atmosphere/ fresh air</i>	34%	31%	37%
<i>Shopping</i>	19%	24%	33%
<i>Sightseeing</i>	28%	31%	33%
<i>Hotel/ accommodations</i>	33%	22%	29%
<i>Local culture/ people/ music</i>	12%	22%	27%
<i>Relaxation</i>	31%	33%	21%
<i>Food – quality/ variety/ service</i>	14%	9%	19%
<i>Overall customer service</i>	17%	13%	19%
<i>Variety of activities</i>	14%	18%	16%
<i>Feeling the Hafa Adai spirit</i>	10%	13%	11%
<i>Military/ historical sites</i>	10%	9%	5%



GUAM TRAVELERS – DRAWBACKS

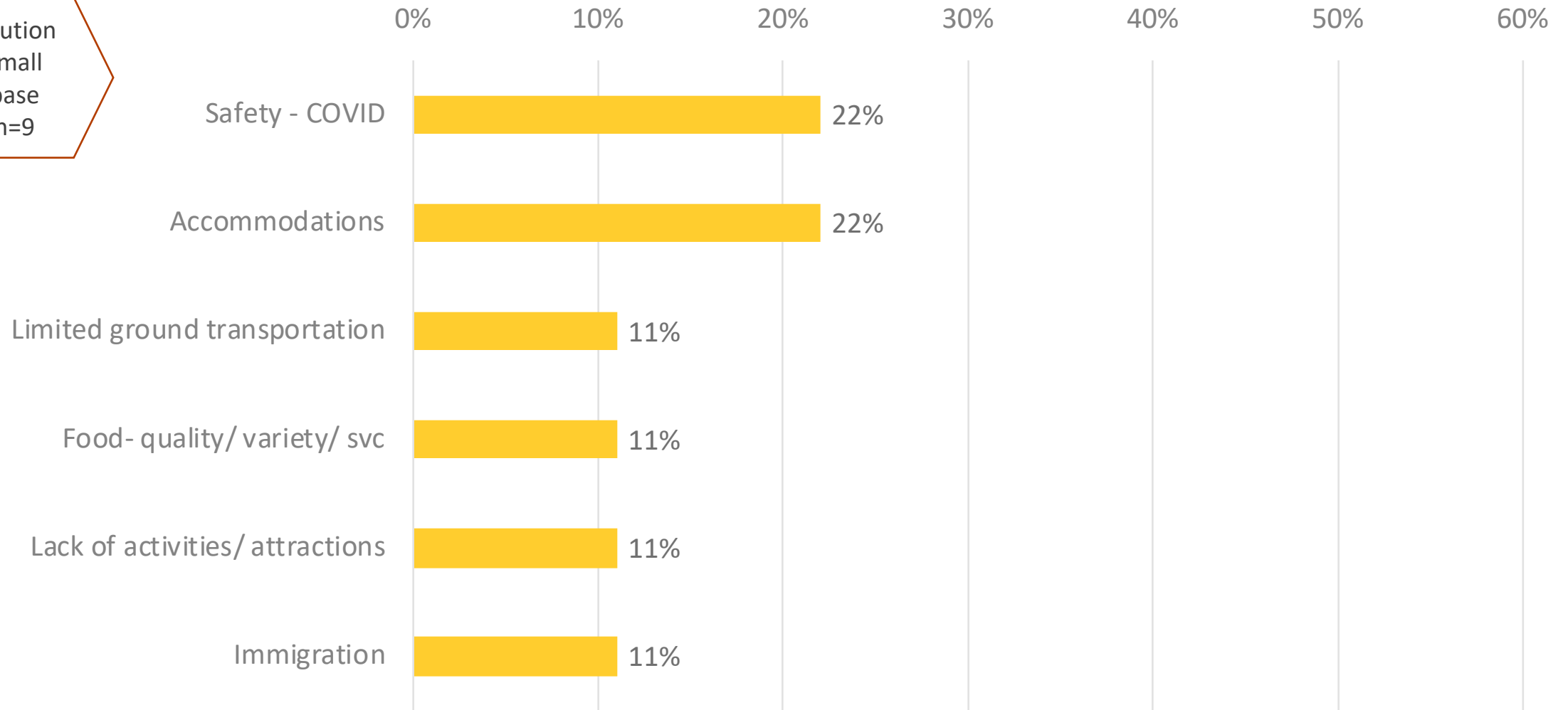
	May 2021	June 2021	Sept 2021
BASE	59	46	63
<i>No negatives</i>	46%	35%	40%
<i>Ground transportation – limited options</i>	14%	22%	16%
<i>Health/ Safety/ COVID</i>	12%	15%	14%
<i>Language barrier</i>	8%	9%	14%
<i>Expensive</i>	19%	17%	11%
<i>Traffic</i>	10%	7%	11%
<i>Safety</i>	3%	2%	8%
<i>Immigration</i>	5%	15%	6%
<i>Food – quality/ variety/ service</i>	7%	9%	5%
<i>Lack of activities/ attractions</i>	2%	4%	5%
<i>Customer service</i>	3%	9%	2%
<i>Unfriendly locals</i>	2%	2%	2%

Caution
small
base



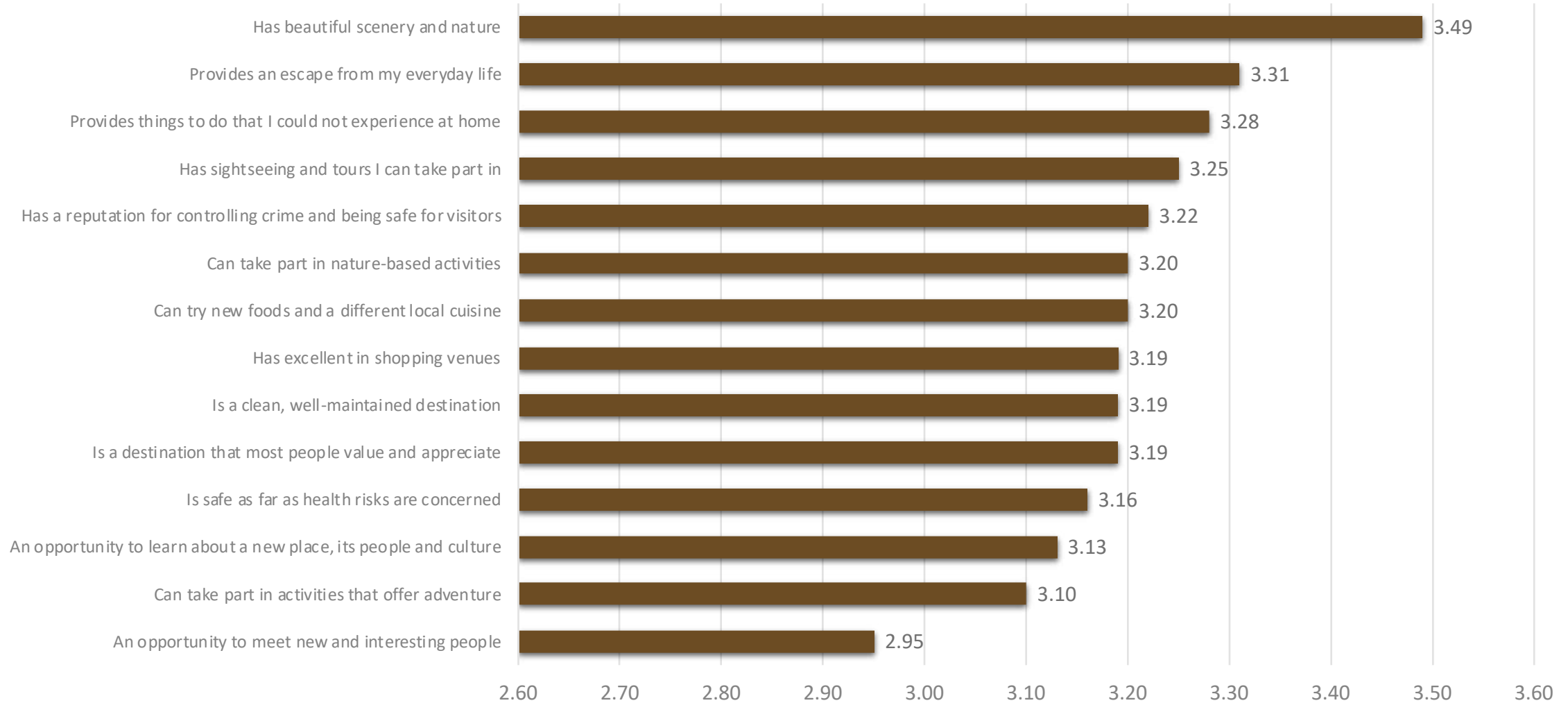
UNLIKELY TO RETURN – REASONS

Caution
small
base
n=9

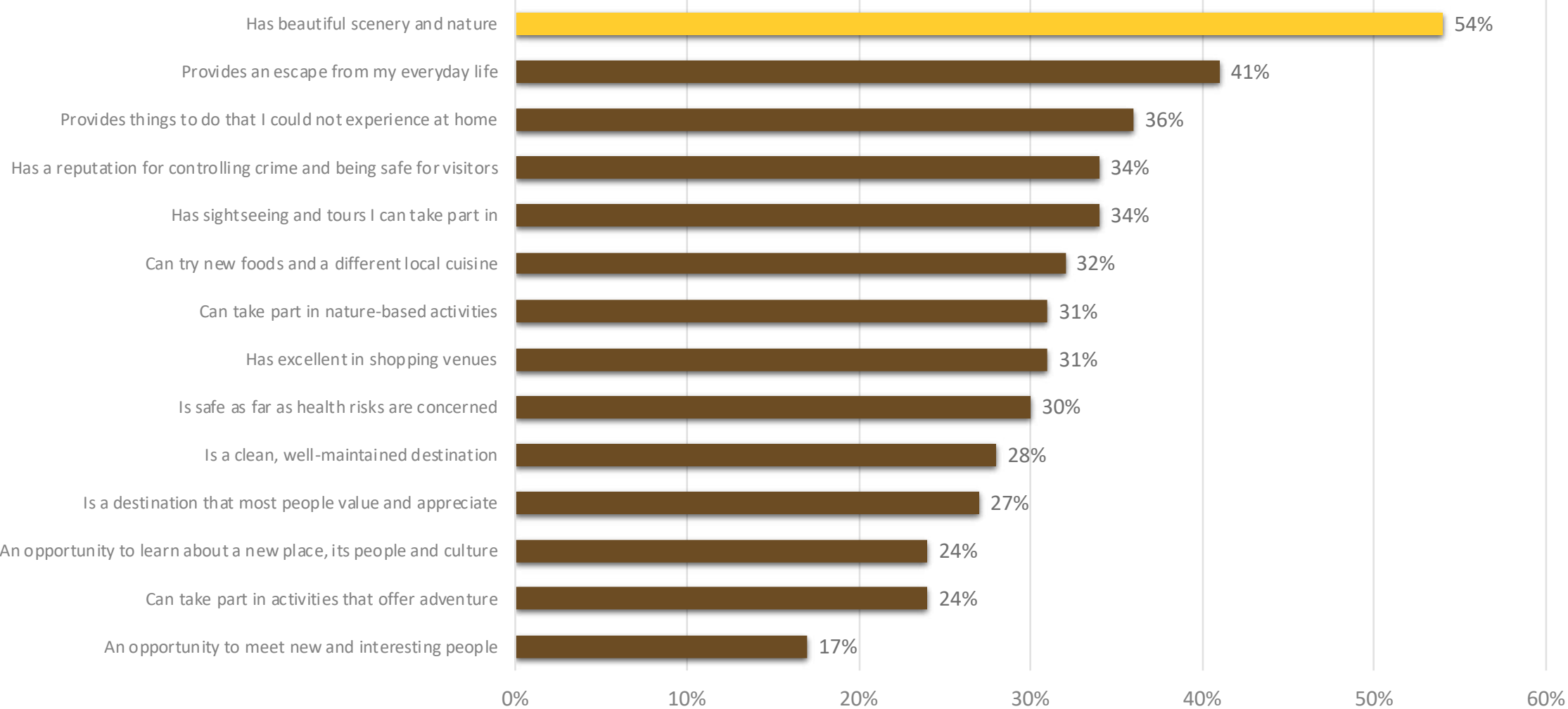


SELECTION FACTORS – SATISFACTION

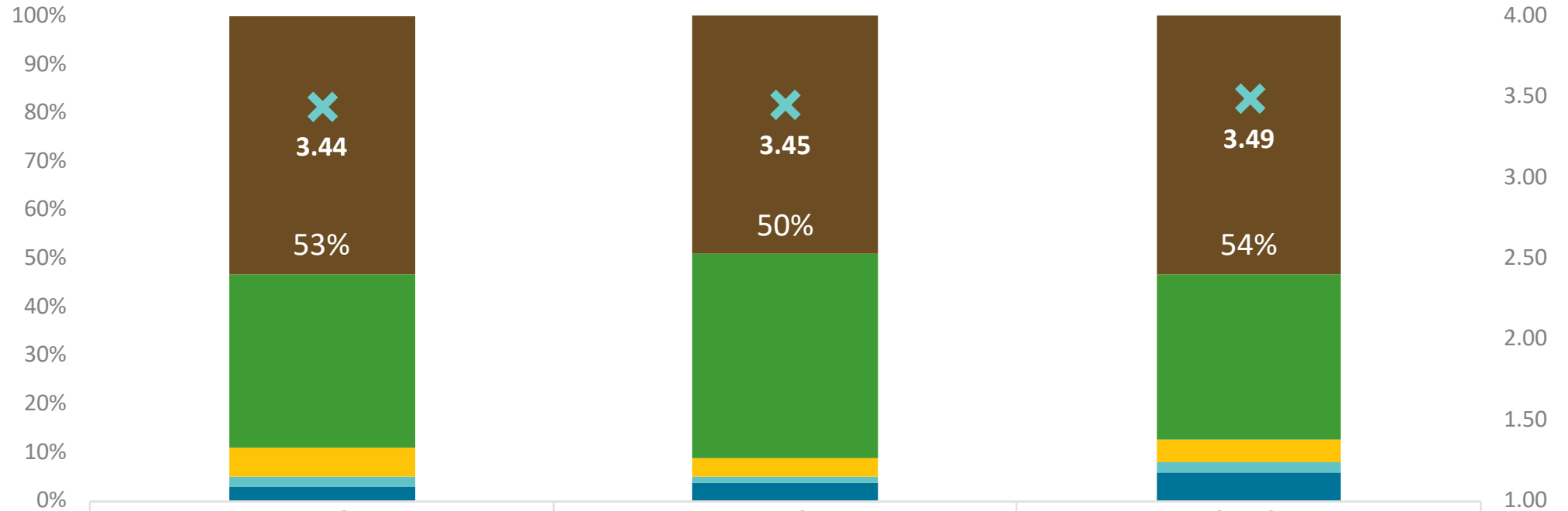
MEAN SCORES 4PT SCALE



SELECTION FACTORS – SATISFACTION TOP BOX (VERY GOOD)

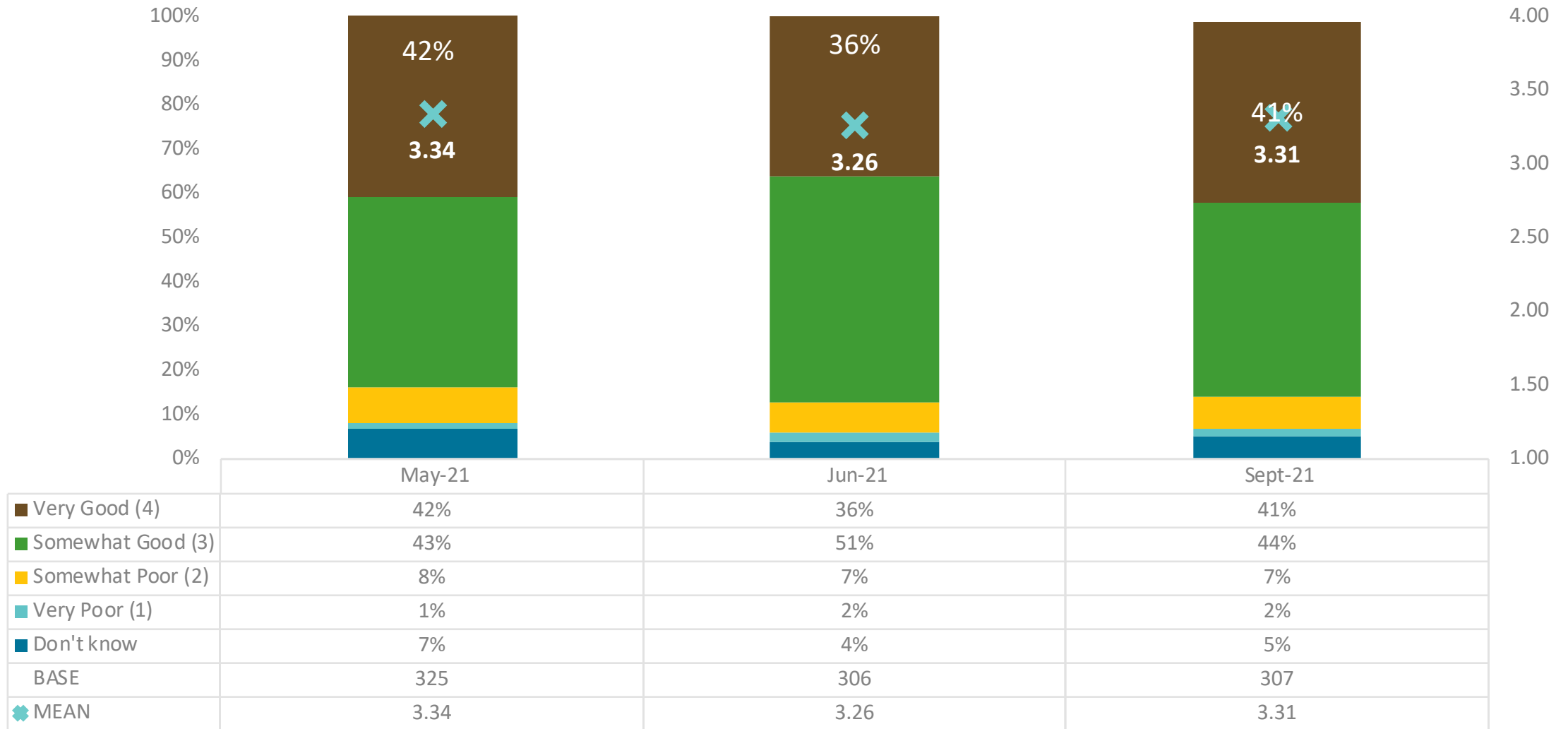


Has beautiful scenery and nature

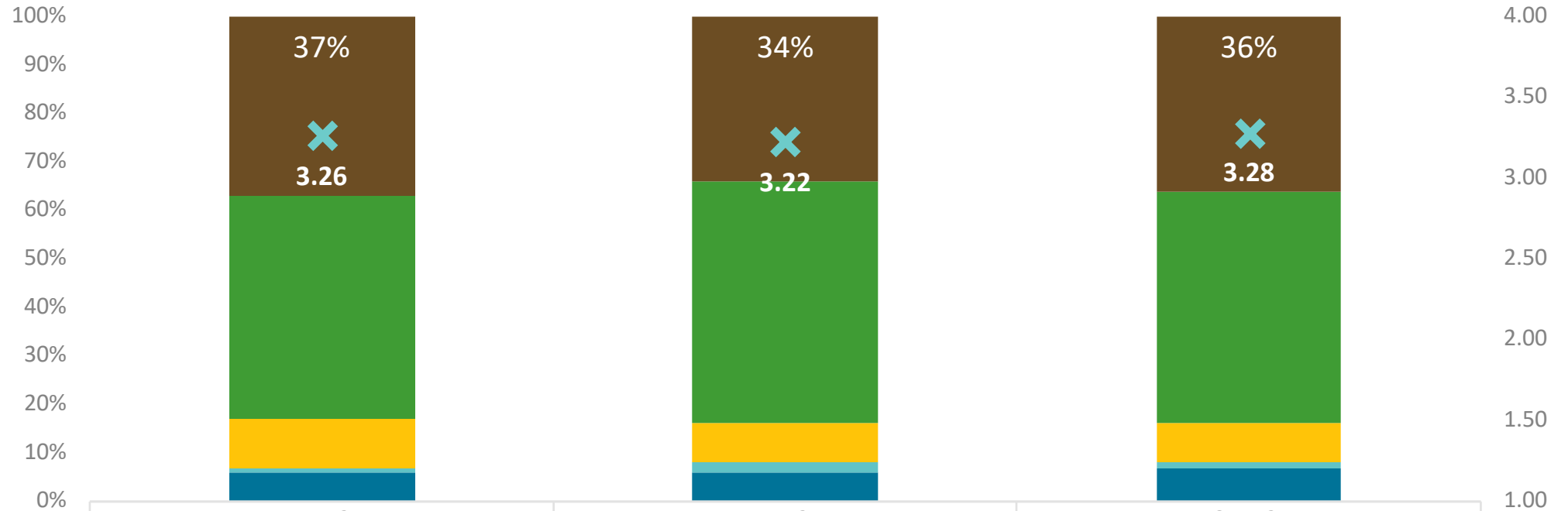


	May-21	Jun-21	Sept-21
Very Good (4)	53%	50%	54%
Somewhat Good (3)	36%	42%	34%
Somewhat Poor (2)	6%	4%	5%
Very Poor (1)	2%	1%	2%
Don't know	3%	4%	6%
BASE	325	306	307
MEAN	3.44	3.45	3.49

Provides an escape from my everyday life

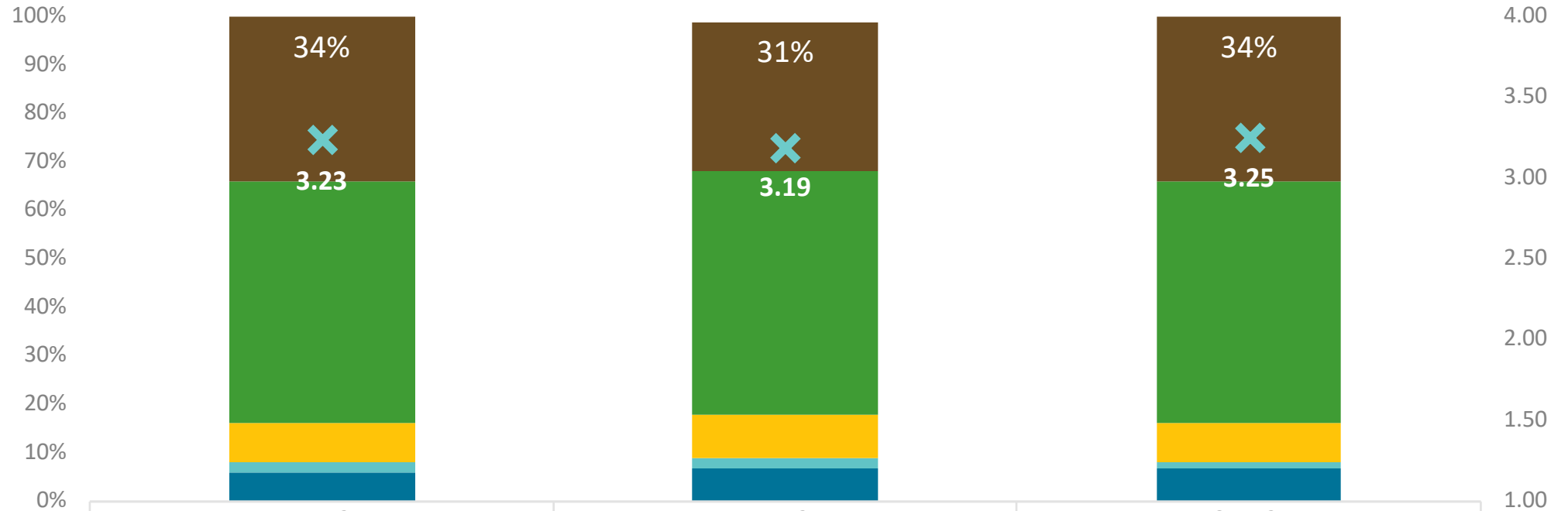


Provides things to do that I could not experience at home



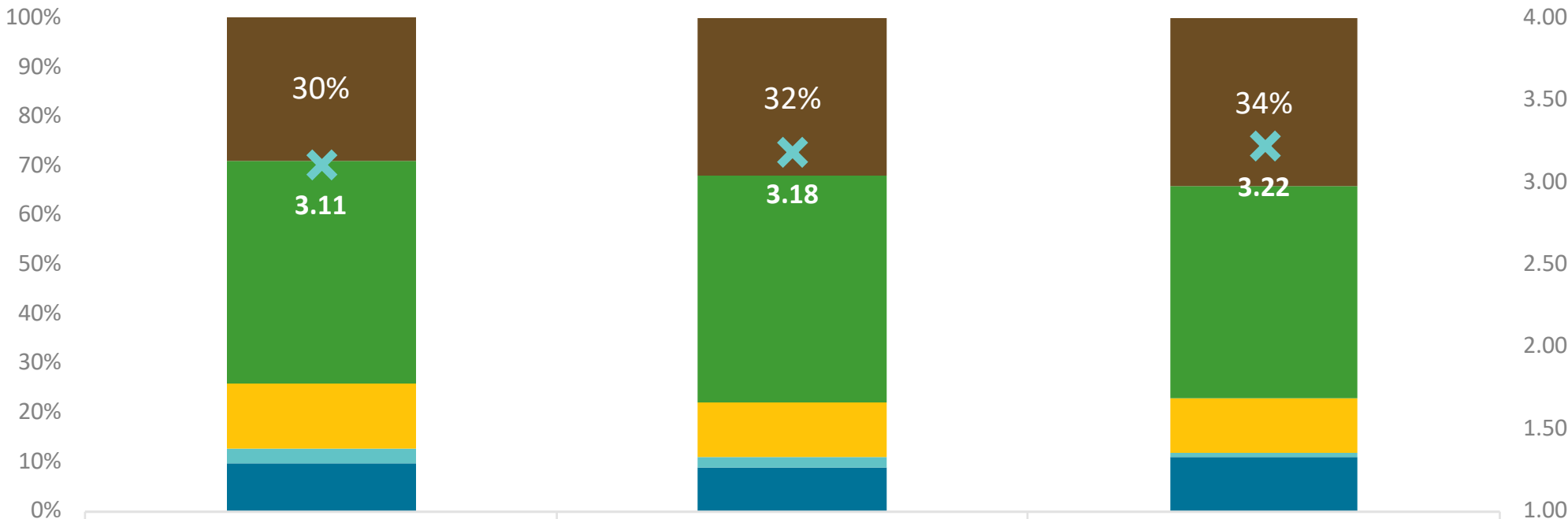
	May-21	Jun-21	Sept-21
Very Good (4)	37%	34%	36%
Somewhat Good (3)	46%	50%	48%
Somewhat Poor (2)	10%	8%	8%
Very Poor (1)	1%	2%	1%
Don't know	6%	6%	7%
BASE	325	306	307
MEAN	3.26	3.22	3.28

Has sightseeing and tours I can take part in



	May-21	Jun-21	Sept-21
Very Good (4)	34%	31%	34%
Somewhat Good (3)	50%	50%	50%
Somewhat Poor (2)	8%	9%	8%
Very Poor (1)	2%	2%	1%
Don't know	6%	7%	7%
BASE	325	306	307
MEAN	3.23	3.19	3.25

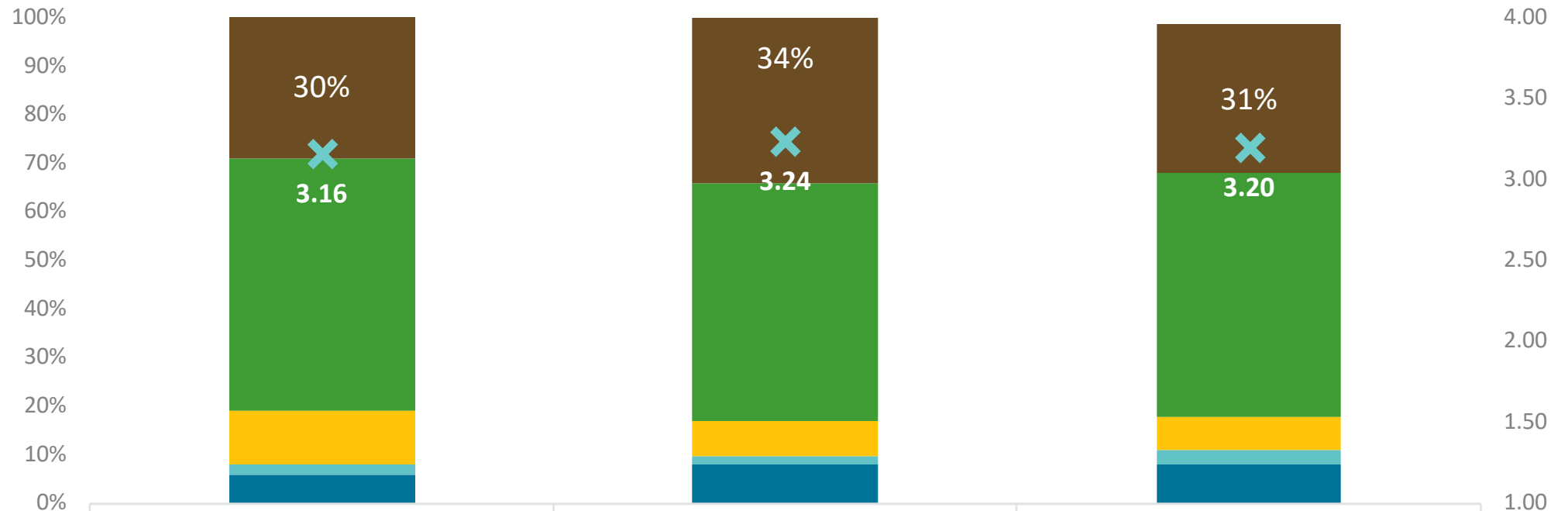
Has a reputation for controlling crime and being safe for visitors



	May-21	Jun-21	Sept-21
Very Good (4)	30%	32%	34%
Somewhat Good (3)	45%	46%	43%
Somewhat Poor (2)	13%	11%	11%
Very Poor (1)	3%	2%	1%
Don't know	10%	9%	11%
BASE	325	306	307
MEAN	3.11	3.18	3.22

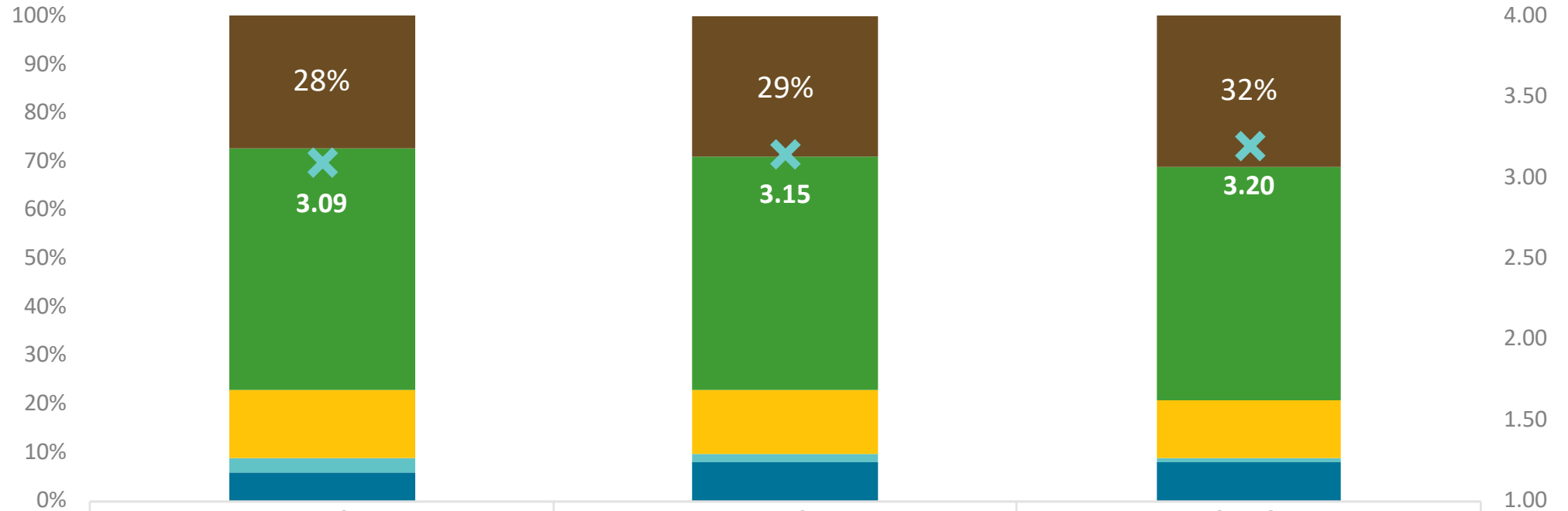


Can take part in nature-based activities



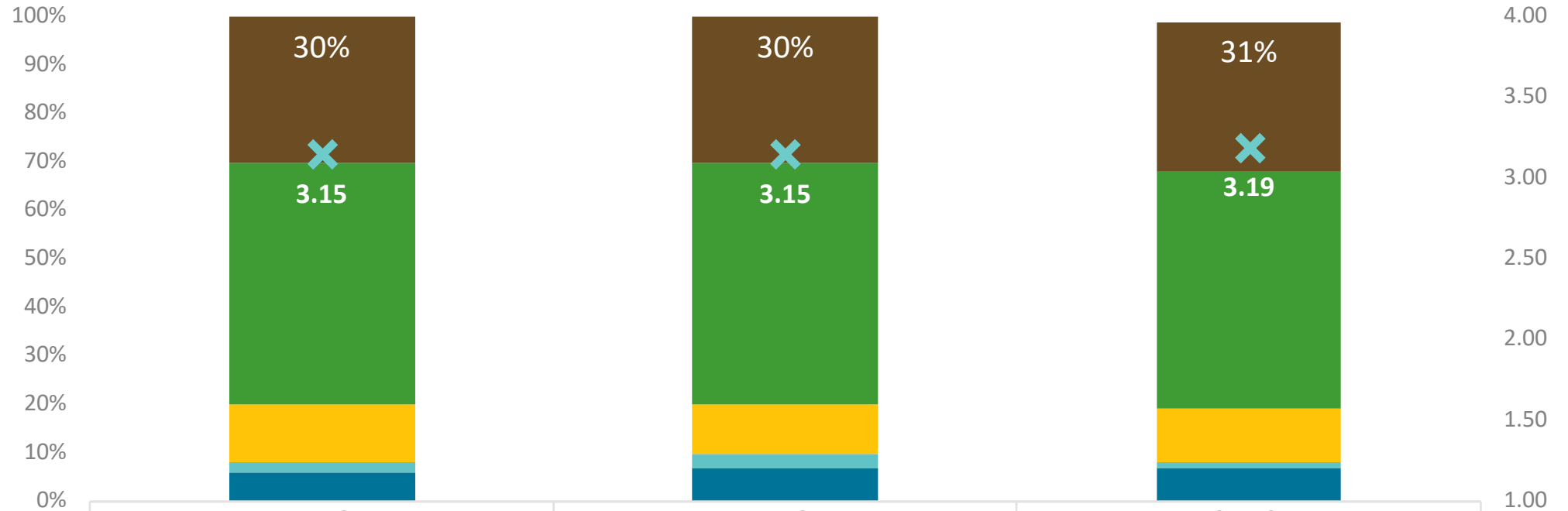
	May-21	Jun-21	Sept-21
Very Good (4)	30%	34%	31%
Somewhat Good (3)	52%	49%	50%
Somewhat Poor (2)	11%	7%	7%
Very Poor (1)	2%	2%	3%
Don't know	6%	8%	8%
BASE	325	306	307
MEAN	3.16	3.24	3.20

Can try new foods and a different local cuisine



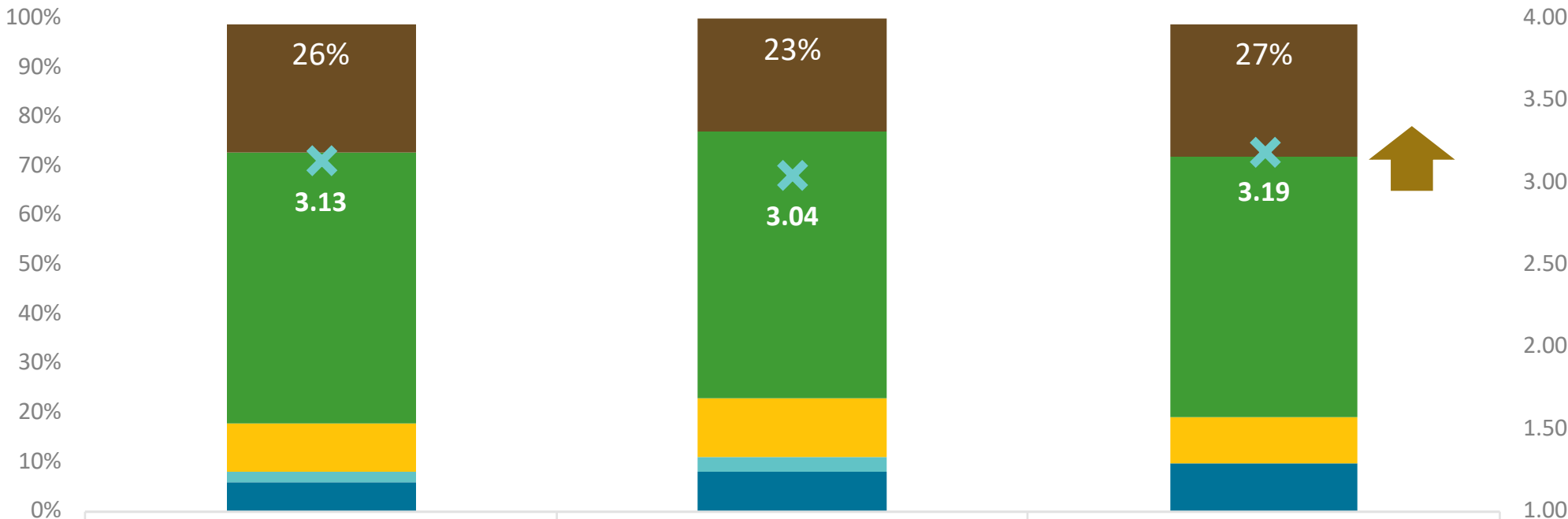
	May-21	Jun-21	Sept-21
Very Good (4)	28%	29%	32%
Somewhat Good (3)	50%	48%	48%
Somewhat Poor (2)	14%	13%	12%
Very Poor (1)	3%	2%	1%
Don't know	6%	8%	8%
BASE	325	306	307
MEAN	3.09	3.15	3.20

Has excellent shopping in venues



	May-21	Jun-21	Sept-21
Very Good (4)	30%	30%	31%
Somewhat Good (3)	50%	50%	49%
Somewhat Poor (2)	12%	10%	11%
Very Poor (1)	2%	3%	1%
Don't know	6%	7%	7%
BASE	325	306	307
MEAN	3.15	3.15	3.19

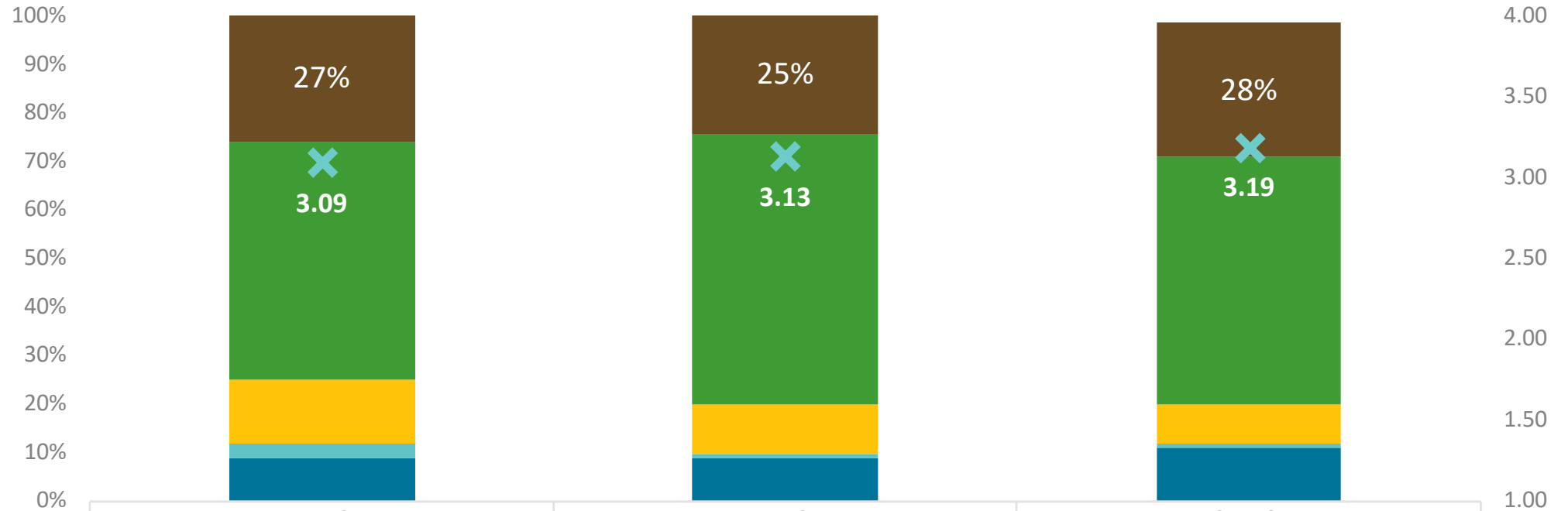
Is a destination that most people value and appreciate



	May-21	Jun-21	Sept-21
Very Good (4)	26%	23%	27%
Somewhat Good (3)	55%	54%	53%
Somewhat Poor (2)	10%	12%	9%
Very Poor (1)	2%	3%	0%
Don't know	6%	8%	10%
BASE	325	306	307
MEAN	3.13	3.04	3.19

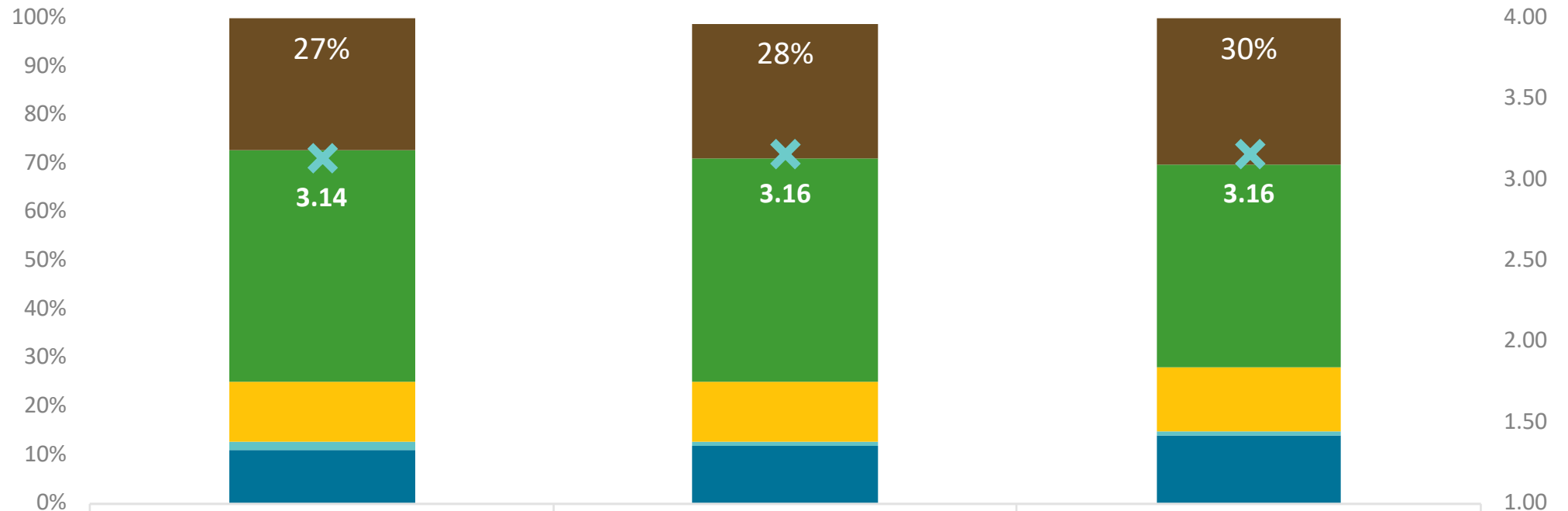


Is a clean, well-maintained destination



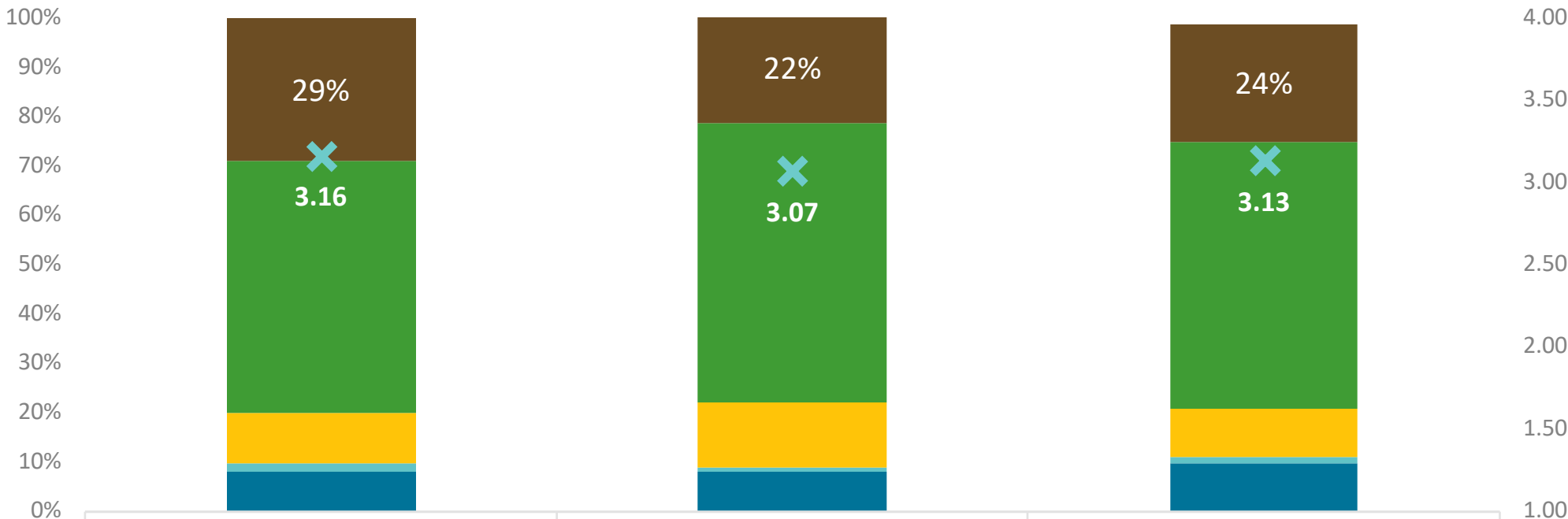
	May-21	Jun-21	Sept-21
Very Good (4)	27%	25%	28%
Somewhat Good (3)	49%	56%	51%
Somewhat Poor (2)	13%	10%	8%
Very Poor (1)	3%	1%	1%
Don't know	9%	9%	11%
BASE	325	306	307
MEAN	3.09	3.13	3.19

Is safe as far as health risks are concerned



	May-21	Jun-21	Sept-21
Very Good (4)	27%	28%	30%
Somewhat Good (3)	48%	46%	42%
Somewhat Poor (2)	12%	12%	13%
Very Poor (1)	2%	1%	1%
Don't know	11%	12%	14%
BASE	325	306	307
MEAN	3.14	3.16	3.16

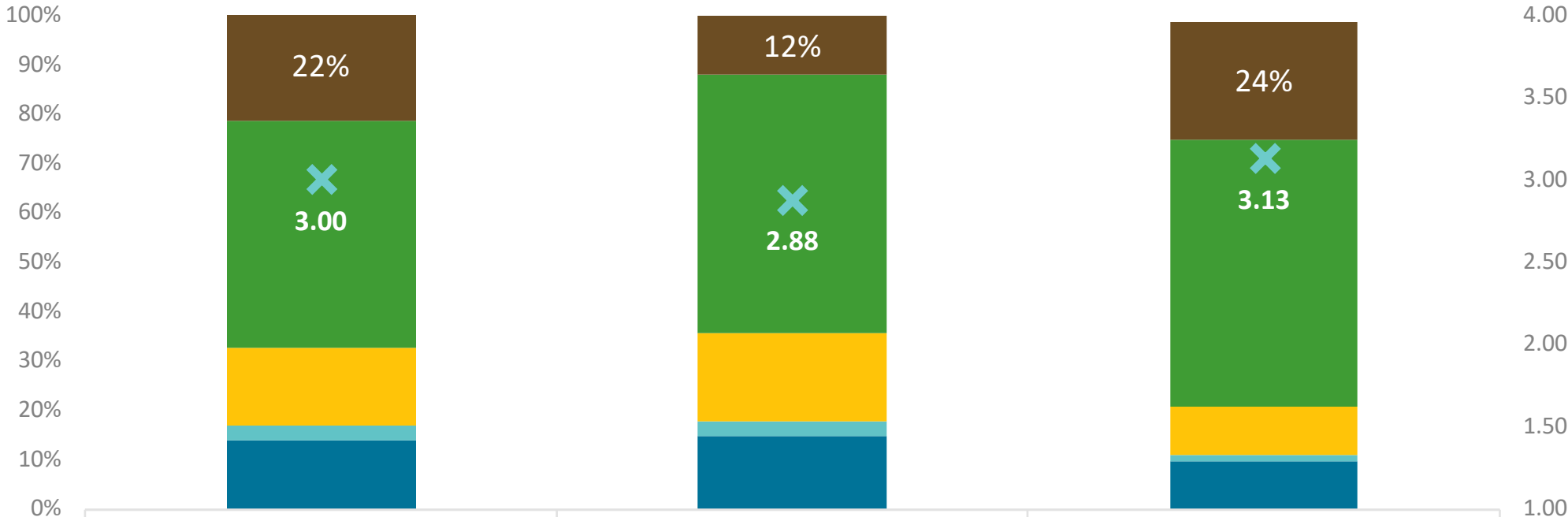
An opportunity to learn about a new place, its people and culture



	May-21	Jun-21	Sept-21
Very Good (4)	29%	22%	24%
Somewhat Good (3)	51%	57%	54%
Somewhat Poor (2)	10%	13%	10%
Very Poor (1)	2%	1%	1%
Don't know	8%	8%	10%
BASE	325	306	307
MEAN	3.16	3.07	3.13



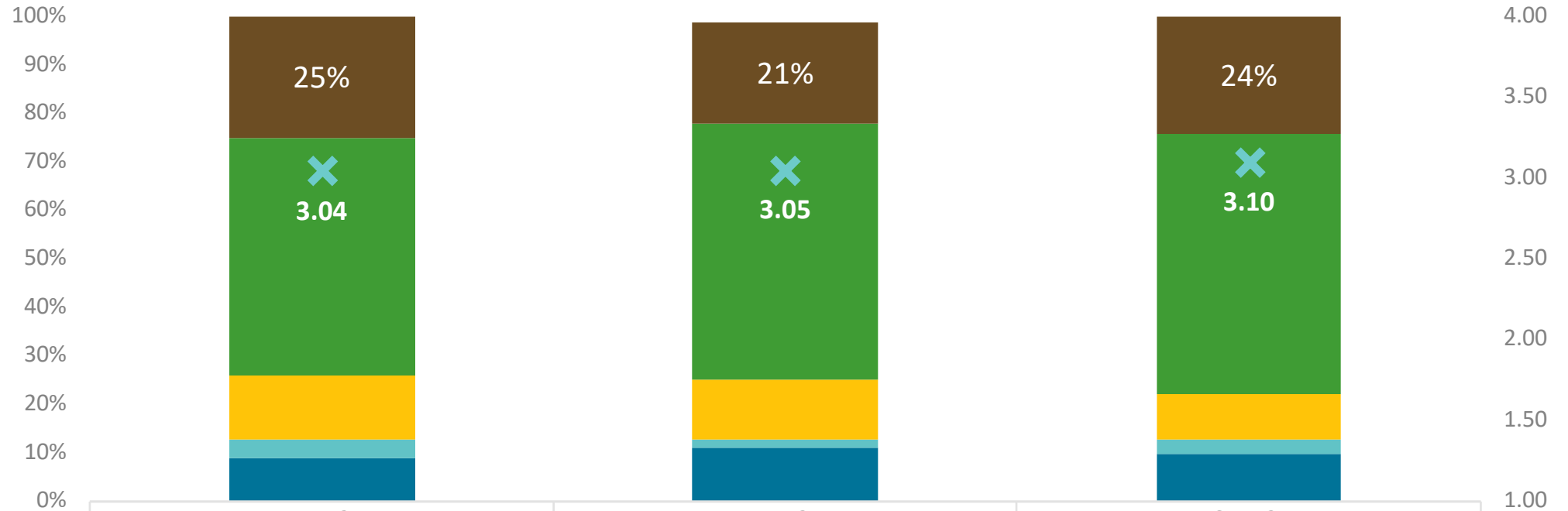
An opportunity to meet new and interesting people



	May-21	Jun-21	Sept-21
Very Good (4)	22%	12%	24%
Somewhat Good (3)	46%	52%	54%
Somewhat Poor (2)	16%	18%	10%
Very Poor (1)	3%	3%	1%
Don't know	14%	15%	10%
BASE	325	306	307
MEAN	3.00	2.88	3.13

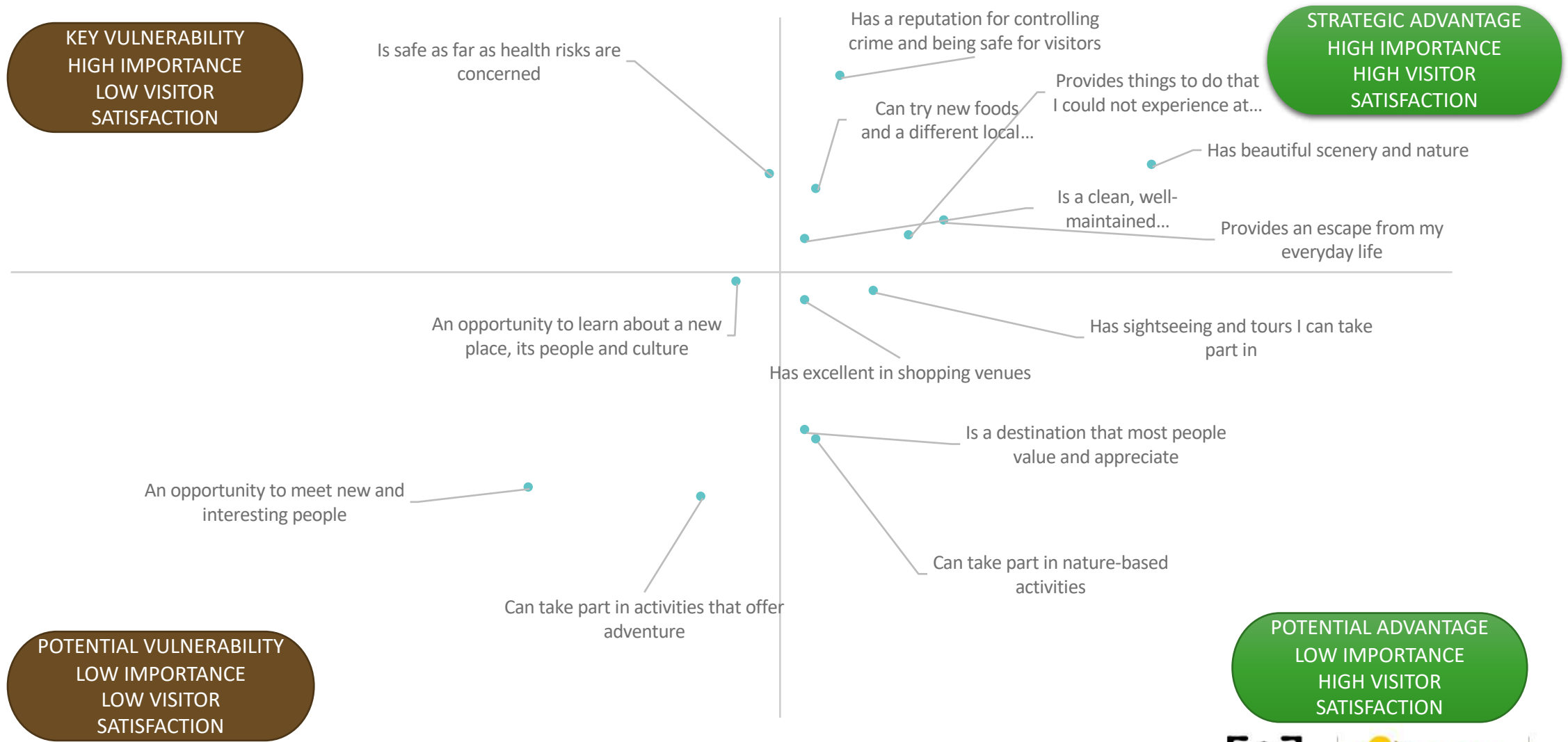


Can take part in activities that offer adventure



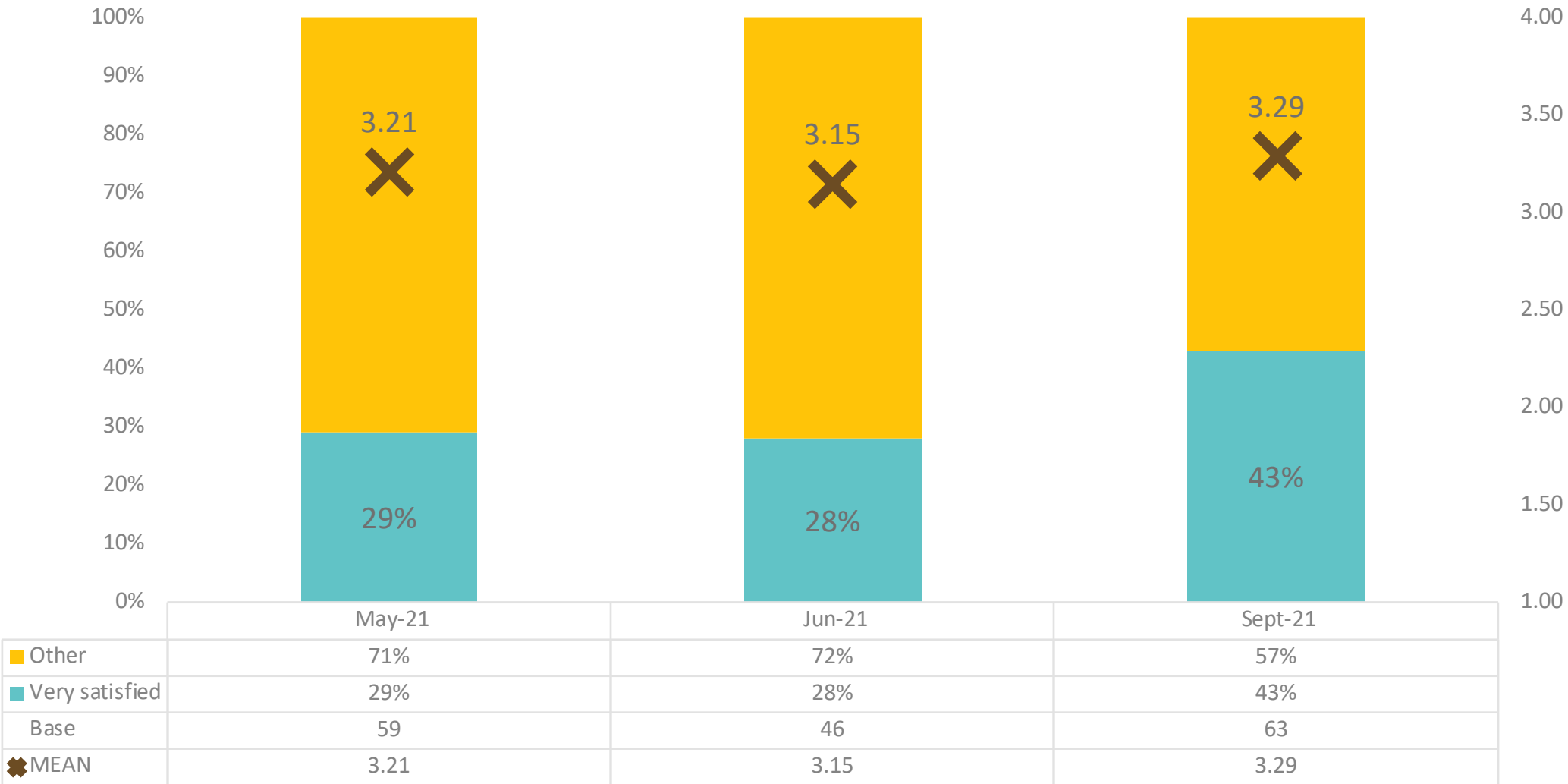
	May-21	Jun-21	Sept-21
Very Good (4)	25%	21%	24%
Somewhat Good (3)	49%	53%	54%
Somewhat Poor (2)	13%	12%	9%
Very Poor (1)	4%	2%	3%
Don't know	9%	11%	10%
BASE	325	306	307
MEAN	3.04	3.05	3.10

NEED-GAP ANALYSIS



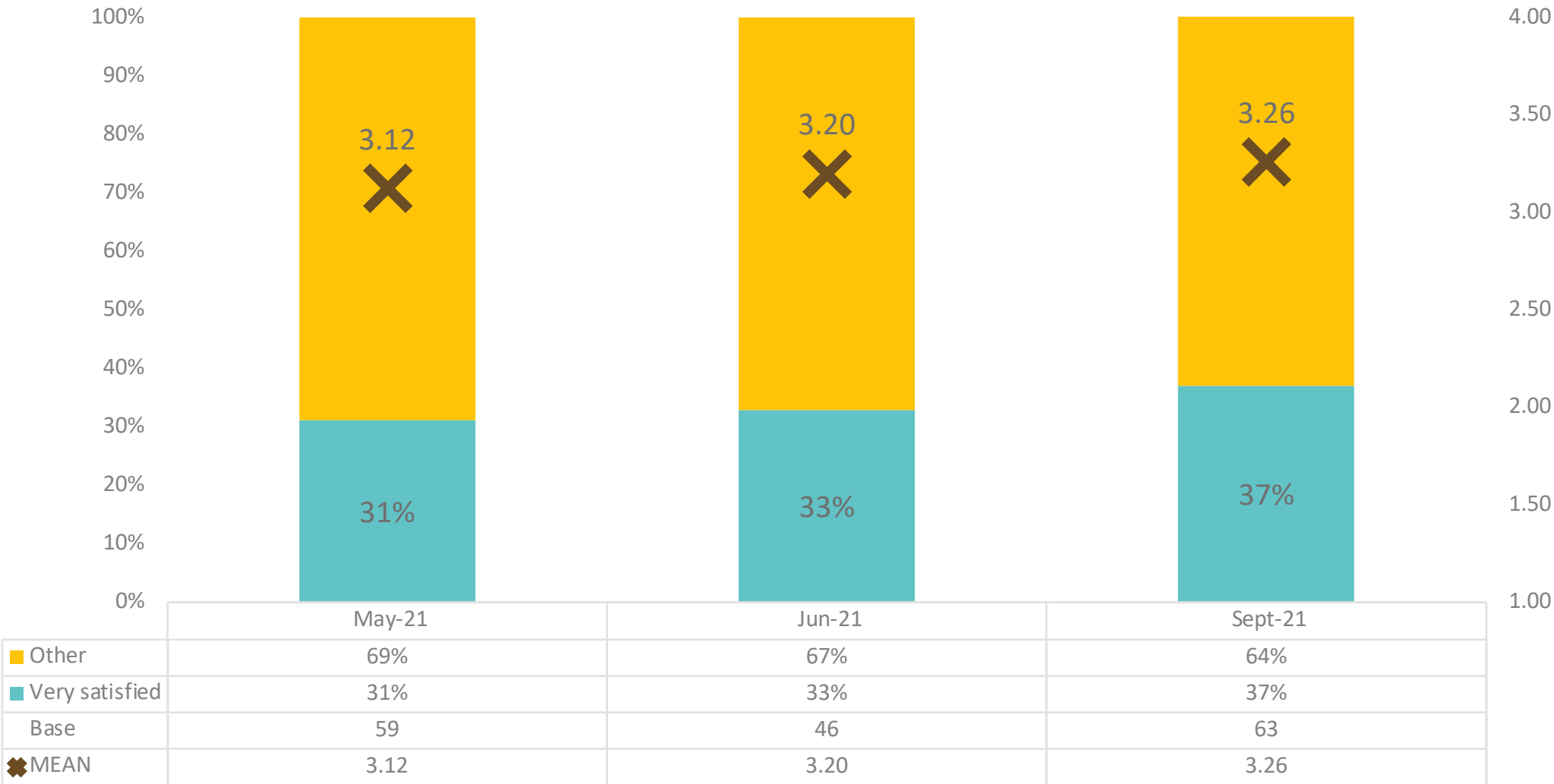
ACCOMMODATIONS – SATISFACTION

4PT RATING SCALE



VISITORS FEEL WELCOME – SATISFACTION

4PT RATING SCALE

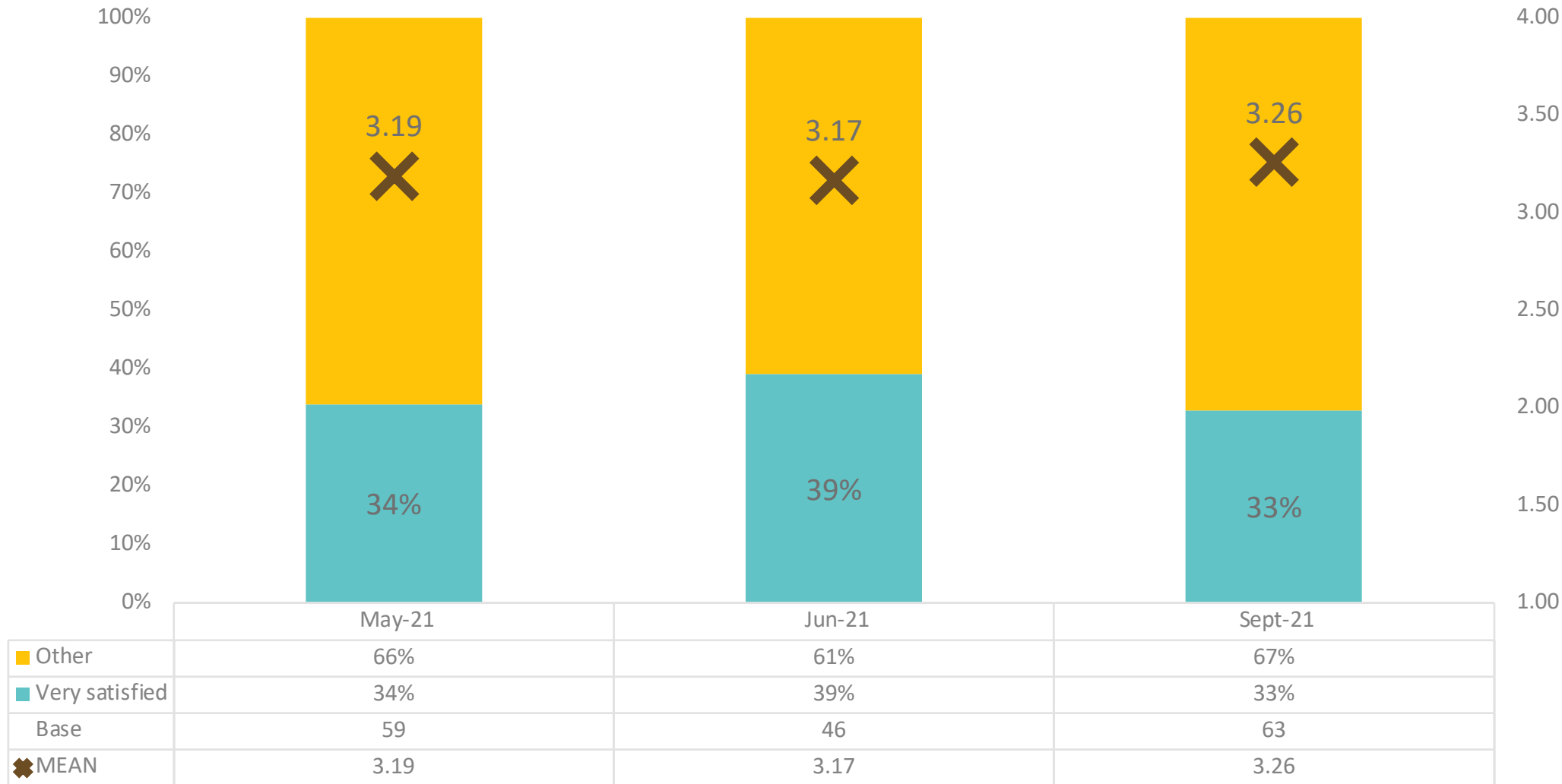


Caution
small
base



VARIETY OF ACTIVITIES – SATISFACTION

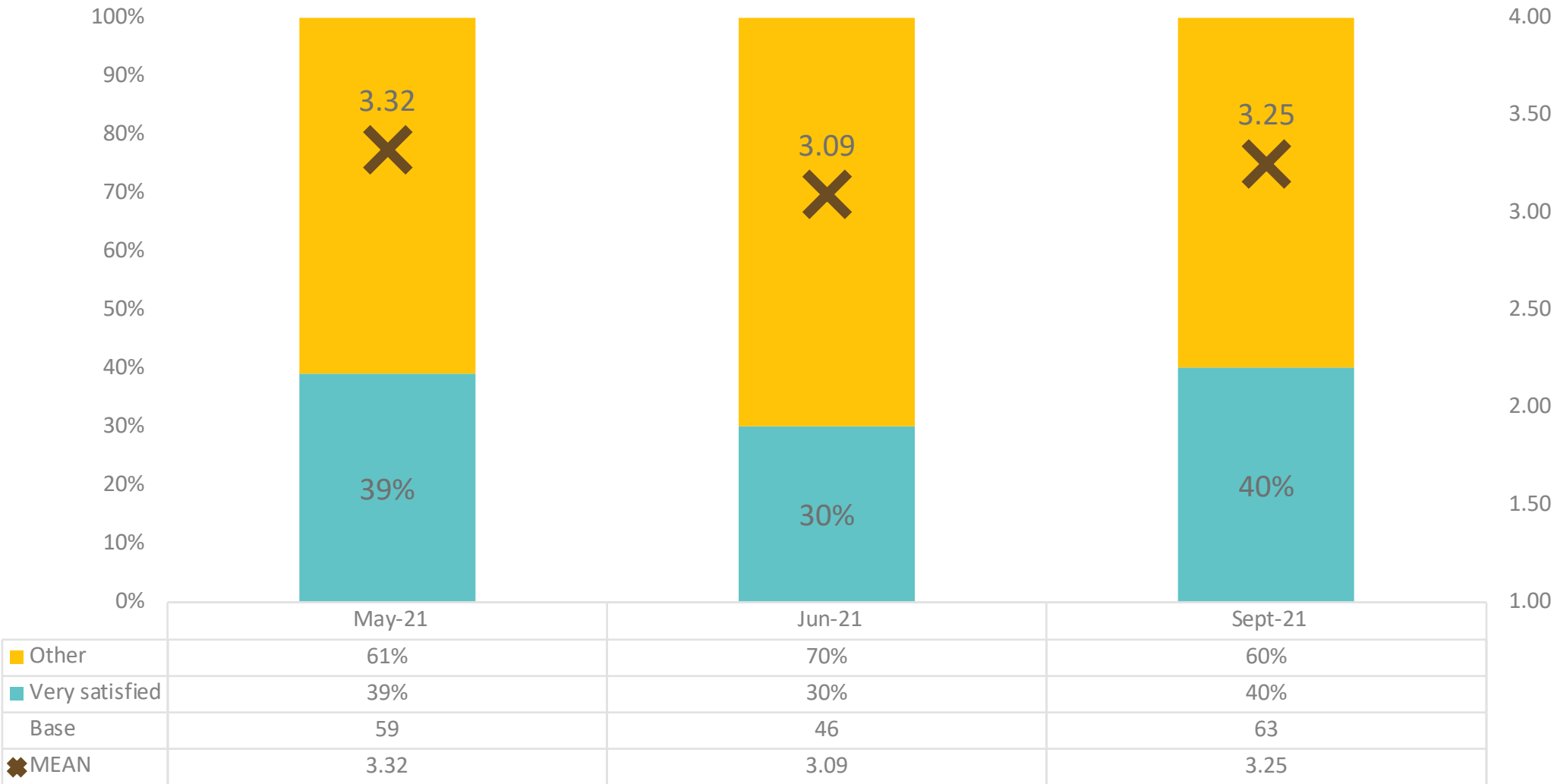
4PT RATING SCALE



Caution
small
base

SHOPPING OPTIONS – SATISFACTION

4PT RATING SCALE

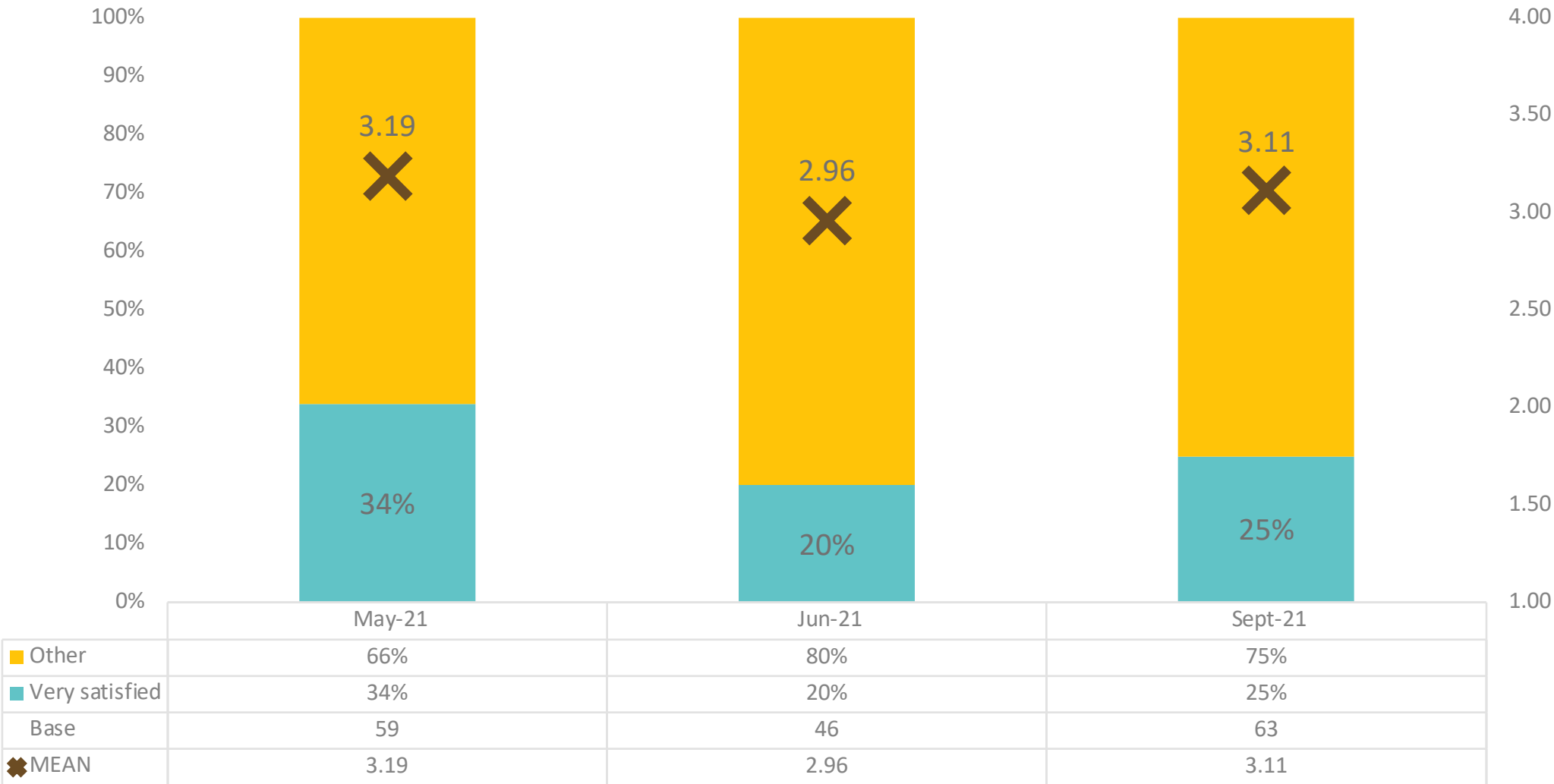


Caution
small
base



QUALITY CUSTOMER SERVICE – SATISFACTION

4PT RATING SCALE

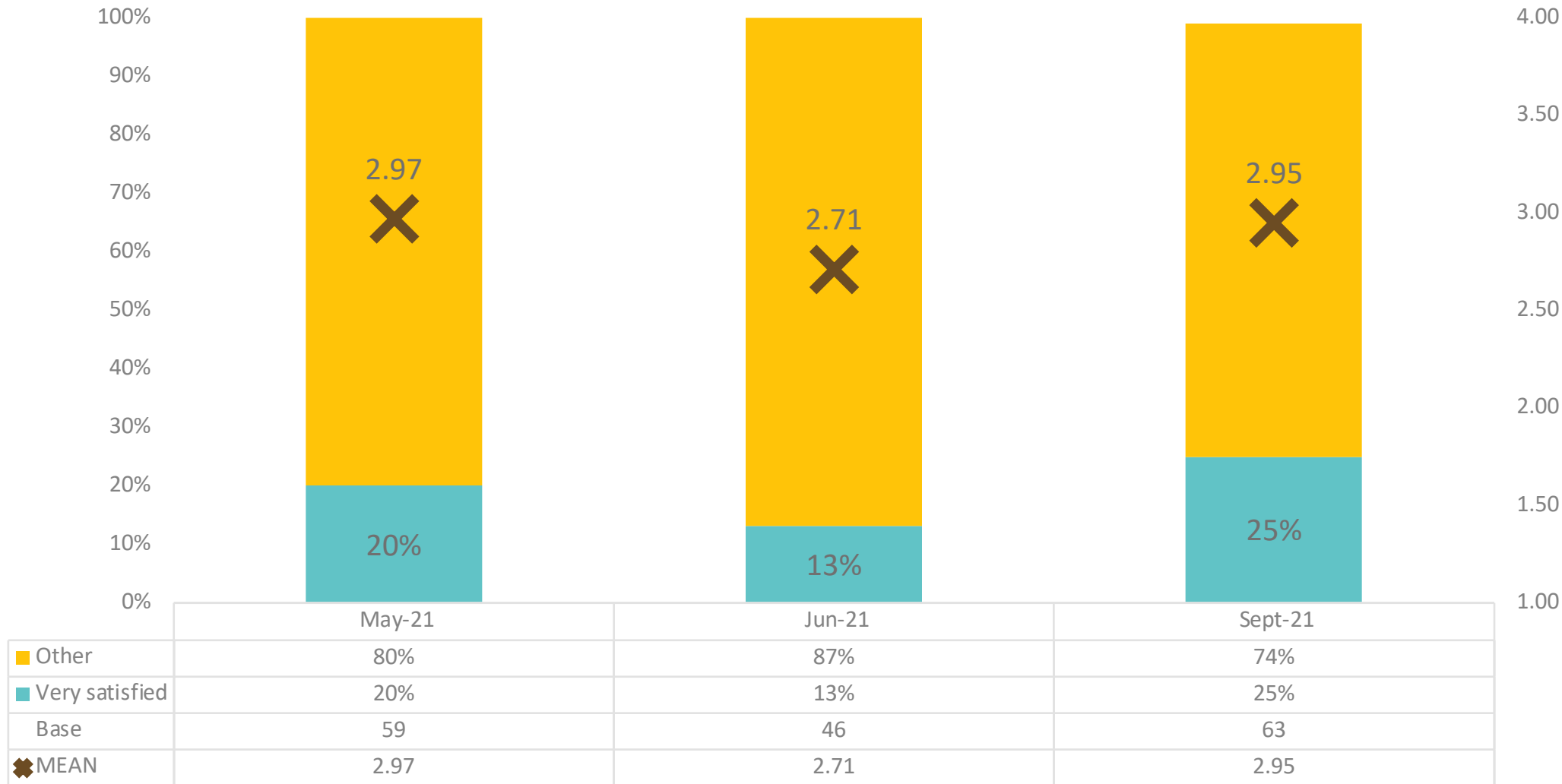


Caution
small
base



TRANSPORTATION OPTIONS – SATISFACTION

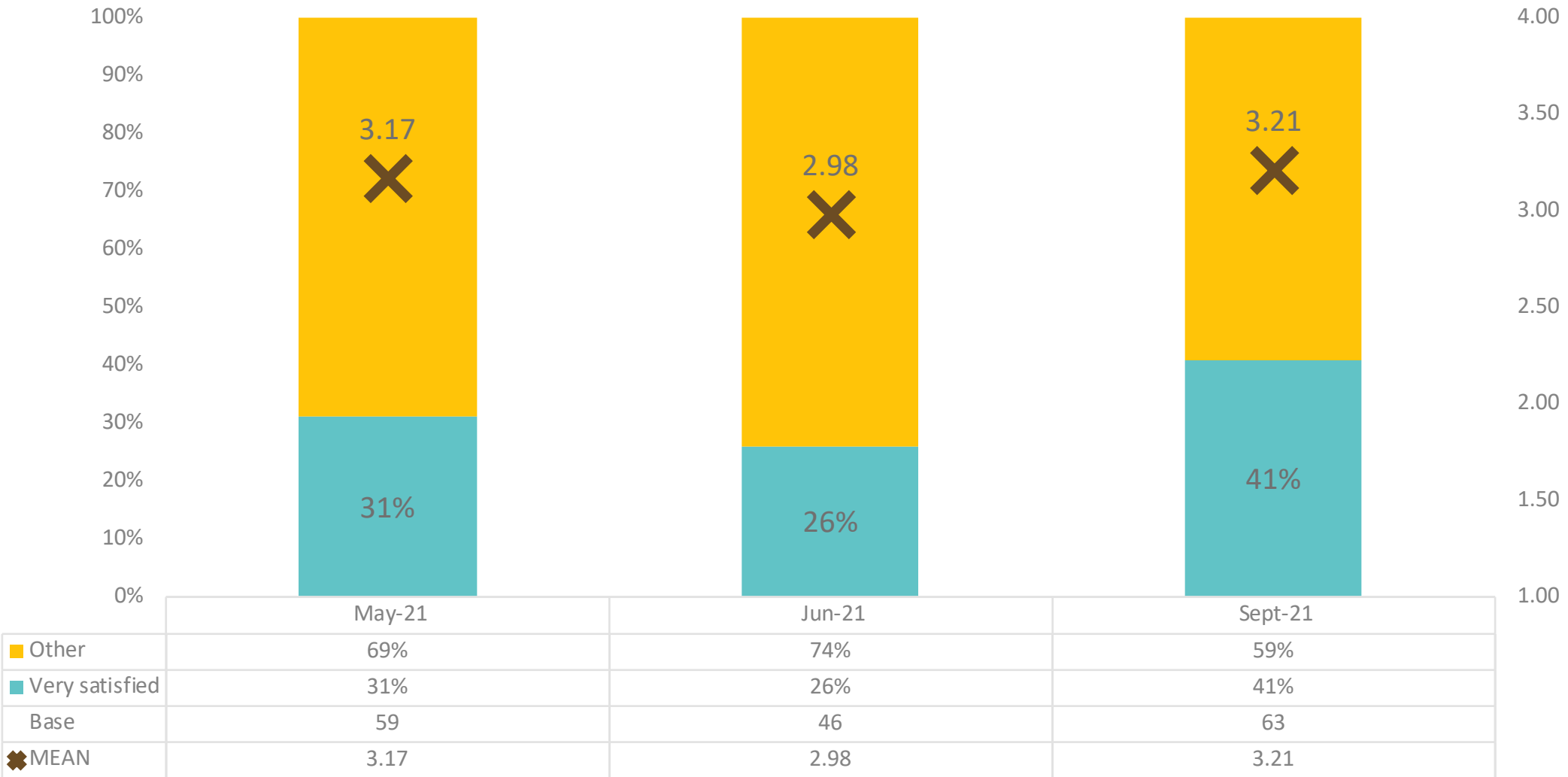
4PT RATING SCALE



Caution
small
base

OVERALL VALUE – SATISFACTION

4PT RATING SCALE



Caution
small
base



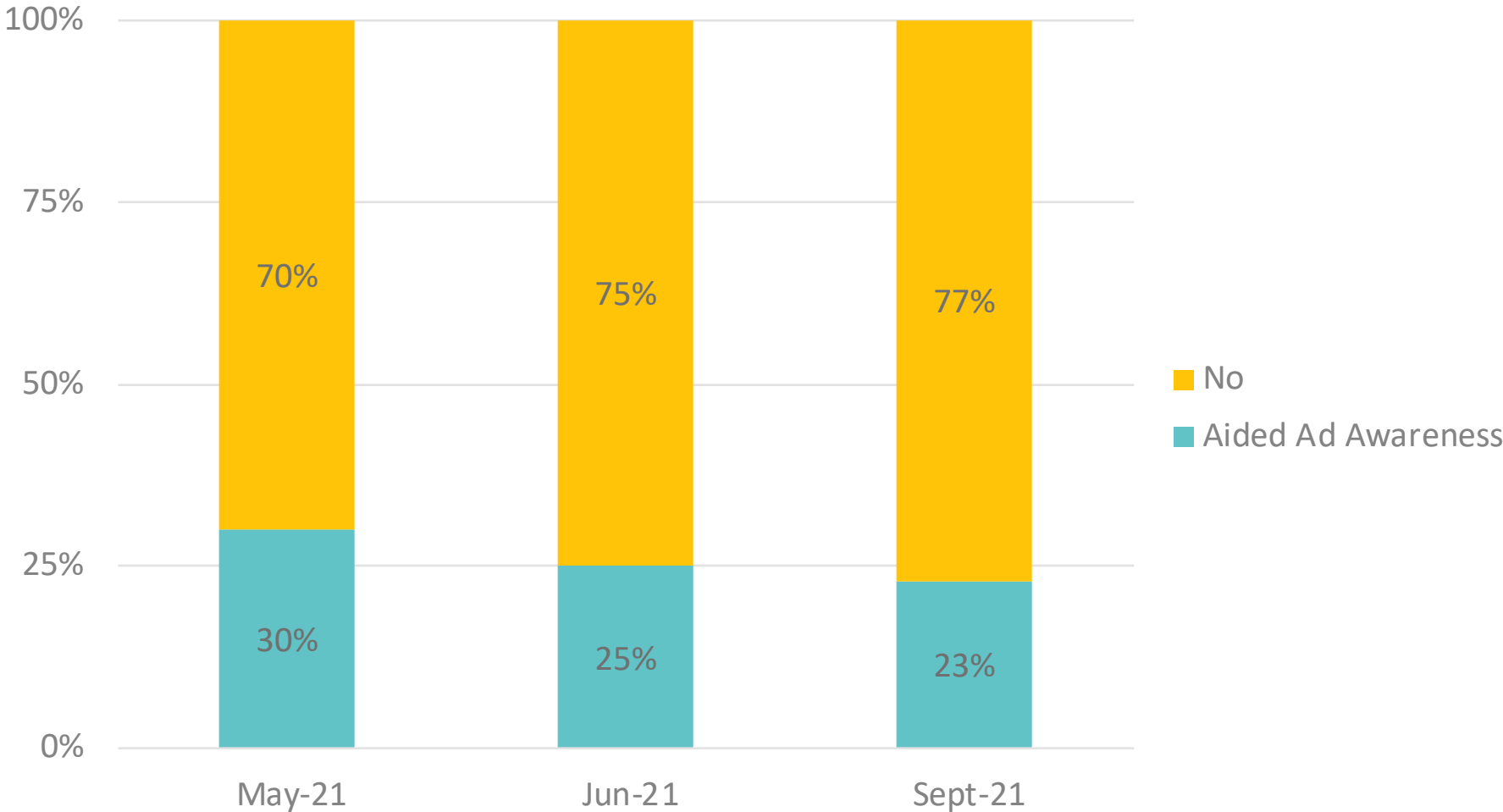


SECTION 4

MARKETING & COMMUNICATIONS



AIDED ADVERTISING AWARENESS



SOURCES OF INFORMATION ABOUT GUAM

	May 2021	June 2021	Sept 21
BASE	59	46	63
<i>Television</i>	32%	22%	32%
<i>Travel guide websites</i>	14%	20%	24%
<i>Recommendations – friends/ family</i>	25%	24%	22%
<i>Social media</i>	7%	13%	11%
<i>GVB website</i>	5%	11%	5%
<i>Travel agents</i>	14%	9%	5%
<i>Radio</i>	3%	-	2%
<i>Other</i>	-	2%	-



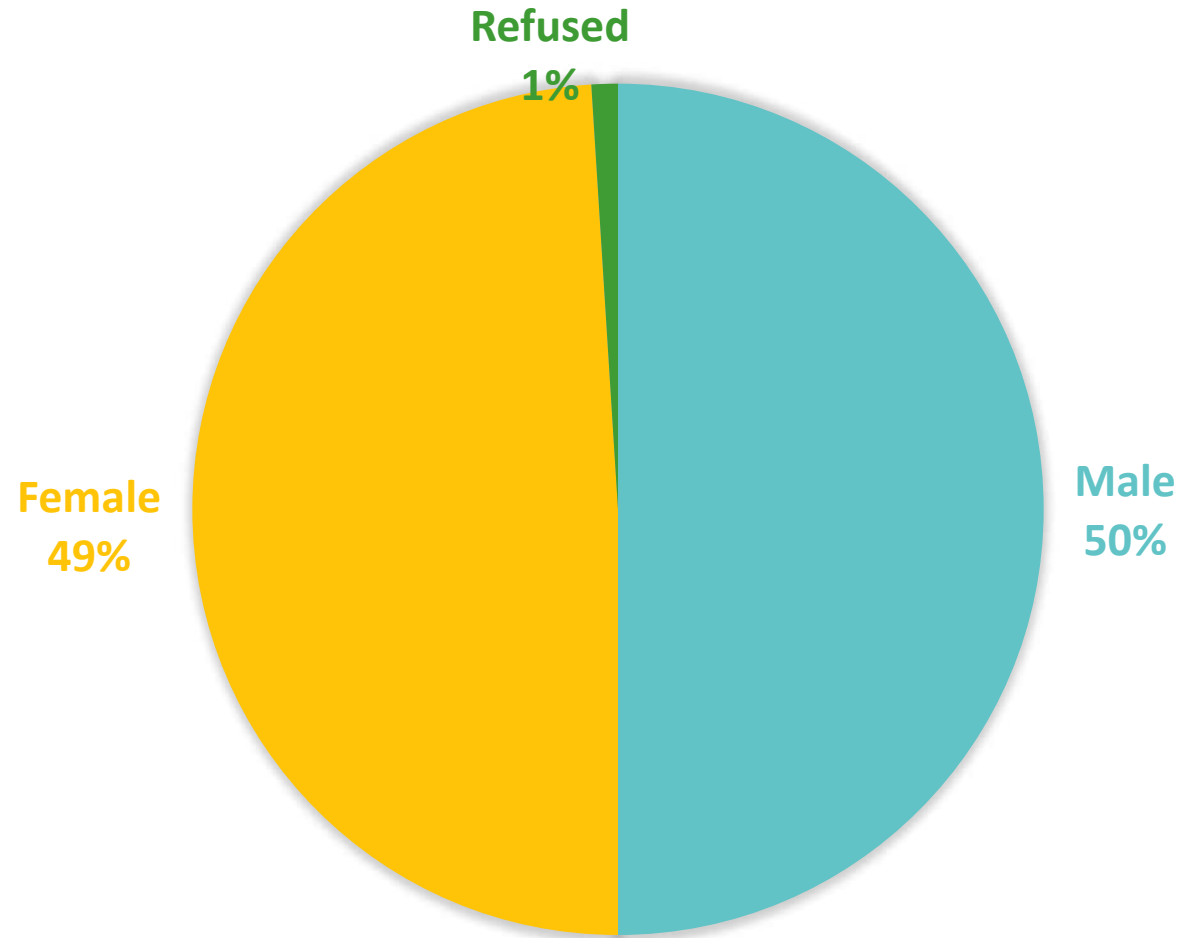


SECTION 5

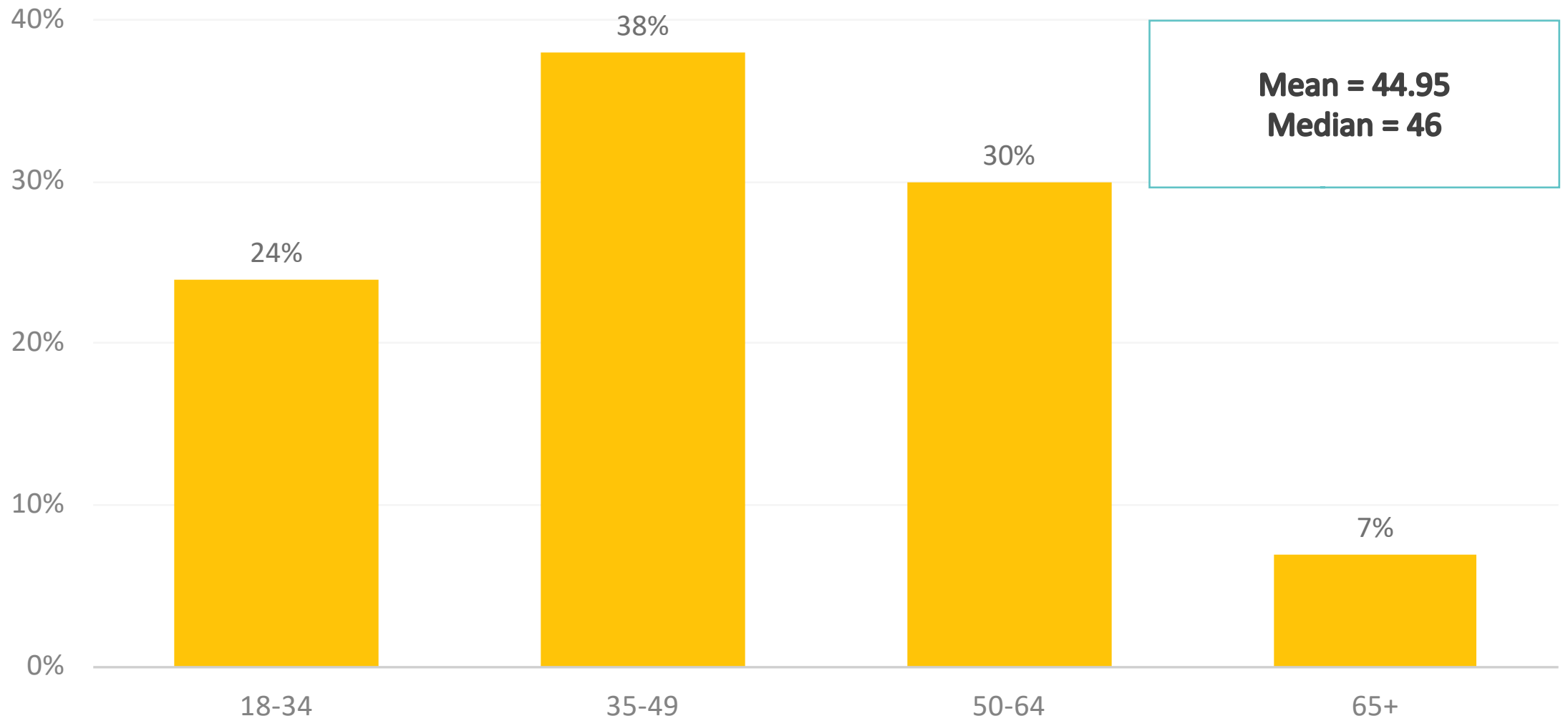
PROFILE OF RESPONDENTS



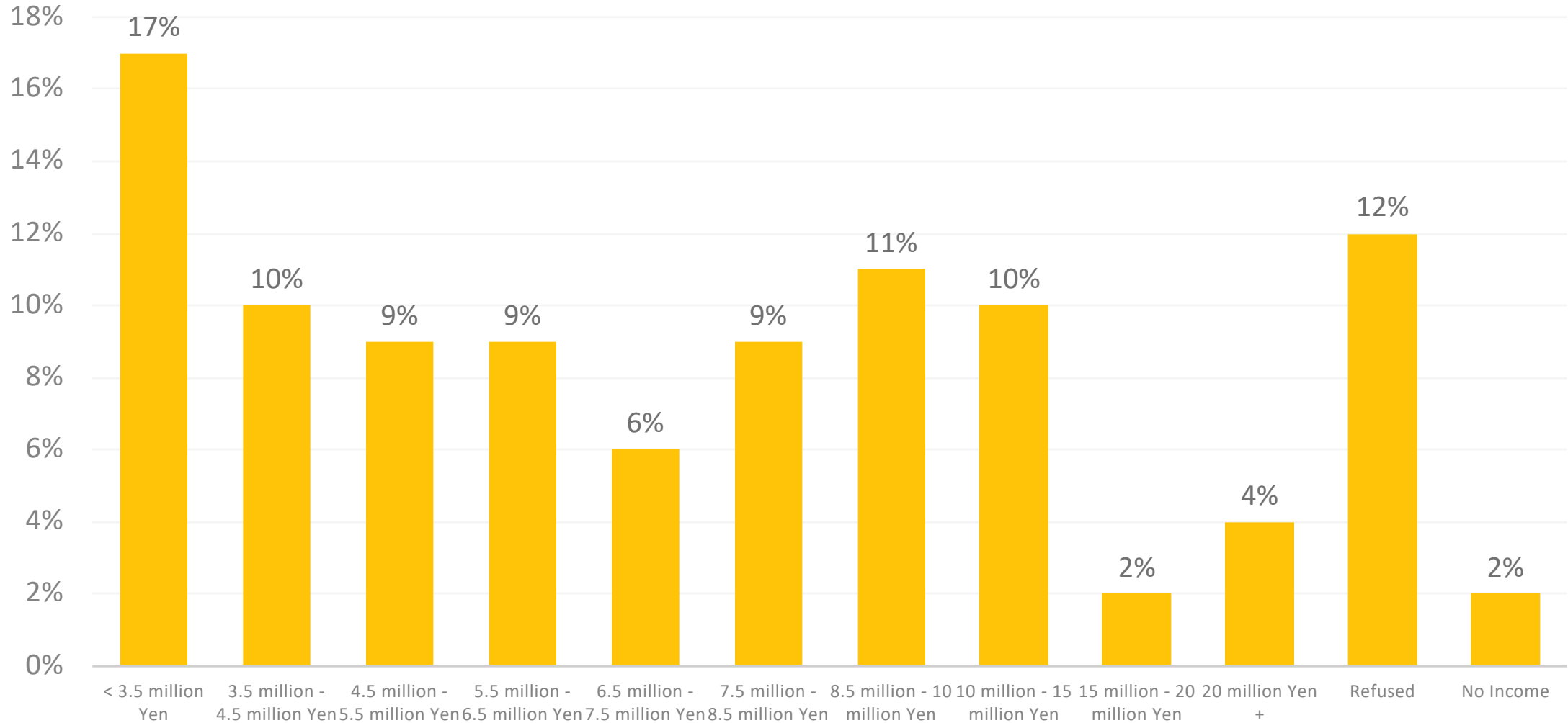
GENDER



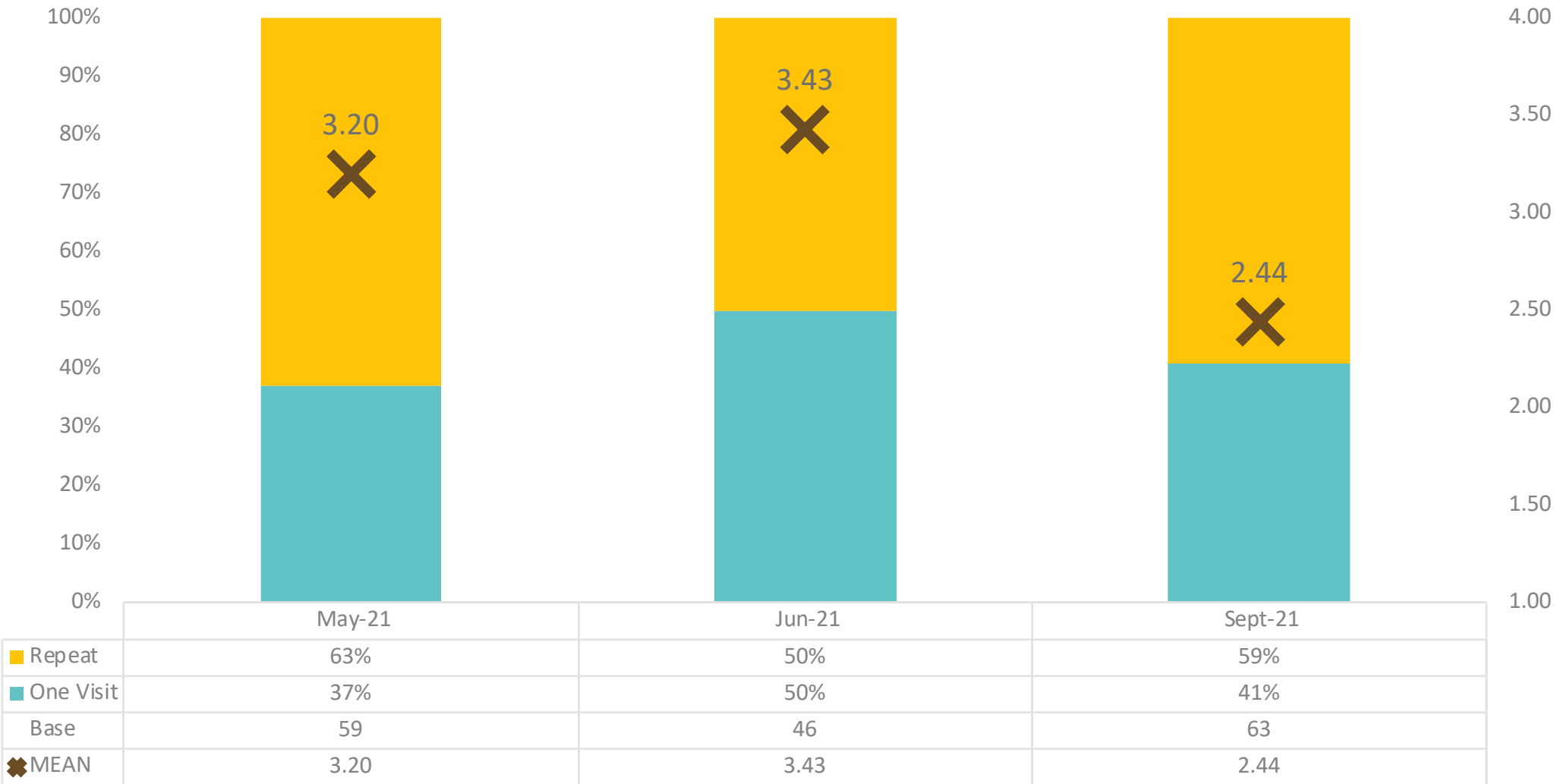
AGE



HOUSEHOLD INCOME



TRIPS TO GUAM



Caution
small
base

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

