



Guam Visitors Bureau

Japan In-Market Insight Report

MAY 2022

[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 internationally 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 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 any reason, in the last three years (since the start of 2019) or intend to travel internationally for any reason in the next five years.
- This report includes results from the survey, conducted April 21-27, 2022. A total of n=358 surveys were collected during this period.
- The margin of error for a sample of n=358 is +/- 5.18 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 +/- 5.18 percentage points.



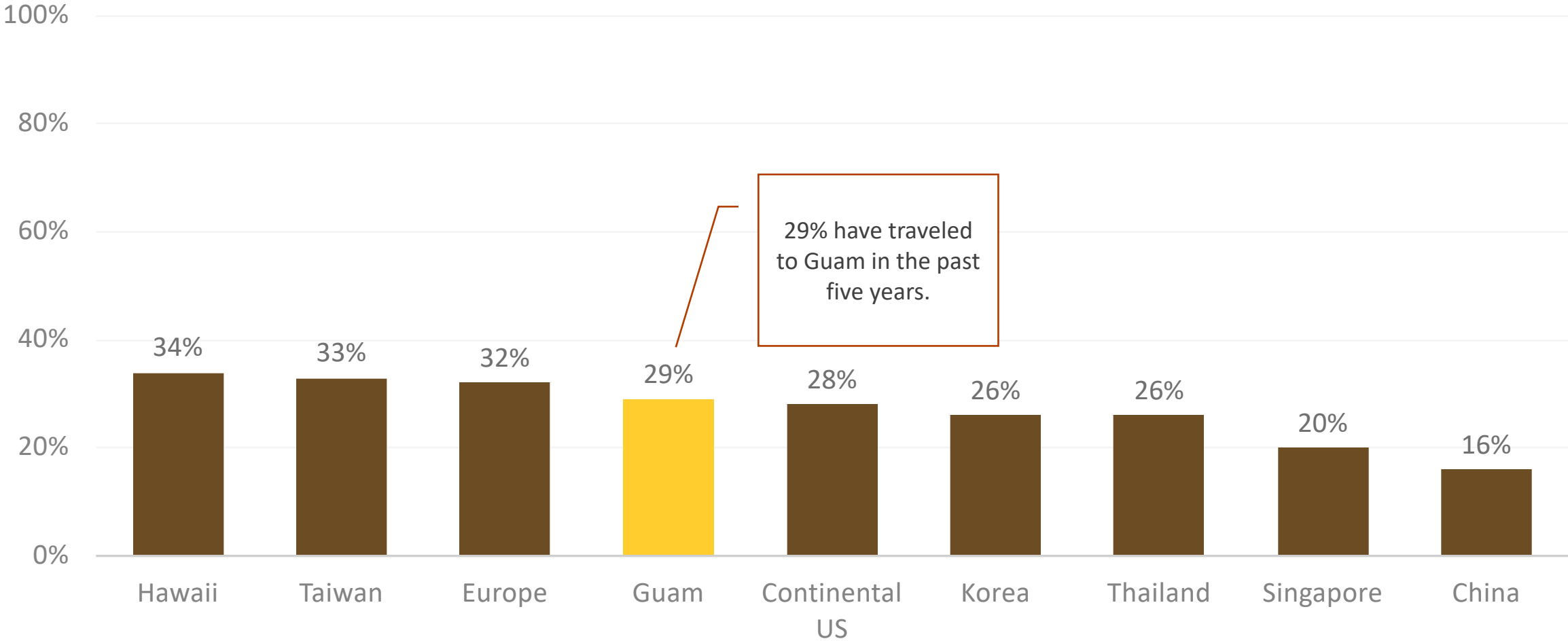


SECTION 1

TRAVEL PLANNING



TRAVEL HISTORY



TRAVEL HISTORY

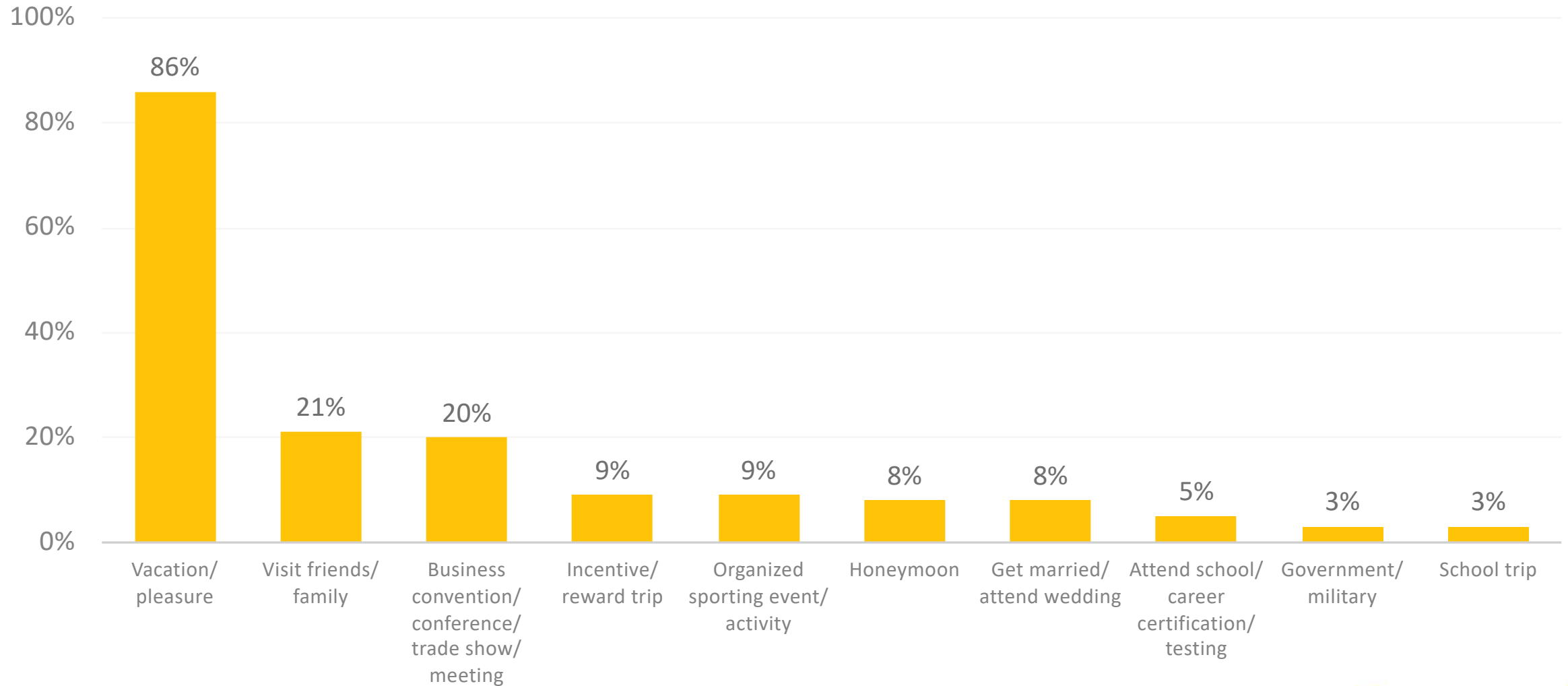
	May 2021	June 2021	Sept 2021	May 2022*
Hawaii	21%	20%	25%	34%
Guam	18%	15%	21%	29%
Taiwan	20%	18%	20%	33%
Not traveling	15%	19%	19%	2%
Continental U.S.	15%	15%	17%	28%
Korea	22%	17%	15%	26%
Europe	19%	18%	15%	32%
Thailand	12%	10%	10%	26%
Other	10%	10%	10%	12%
Singapore	13%	11%	8%	20%
China	10%	8%	7%	16%

Q: To what international destinations have you traveled, for any reason, in the last five years?

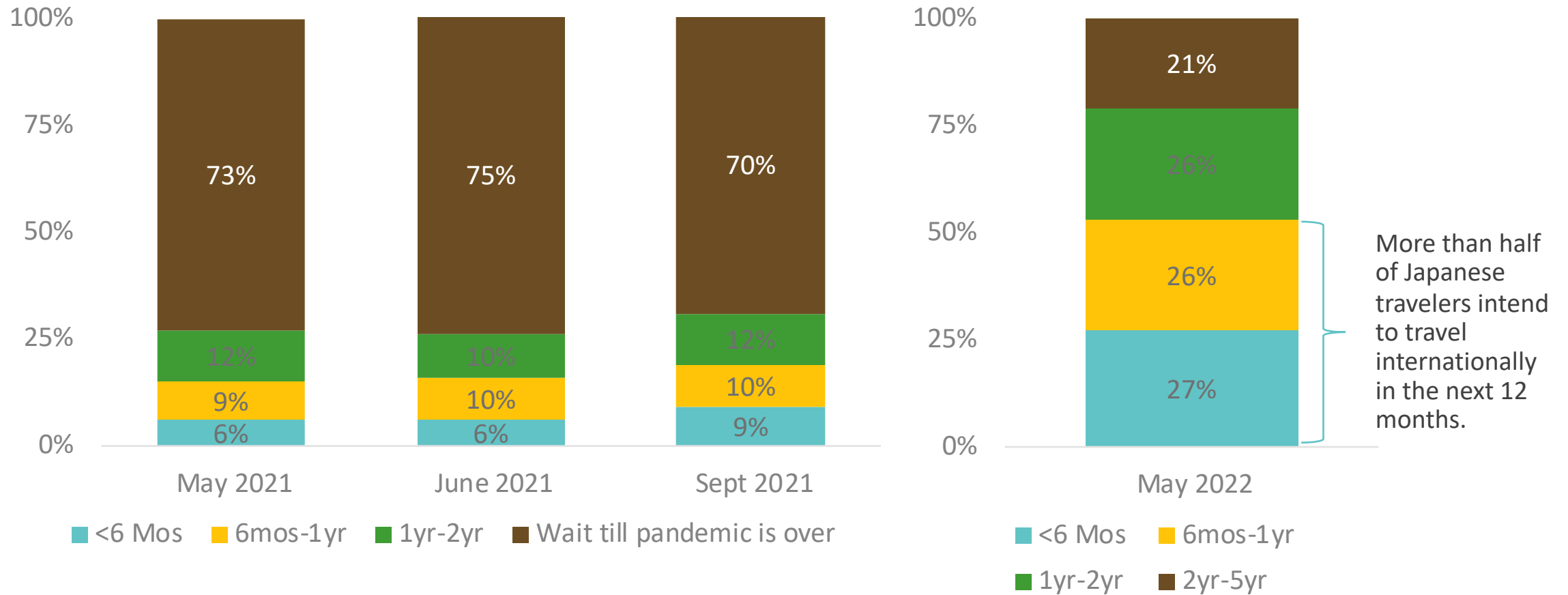
*Note: Question updated in May 2022 to clarify travel for any reason.



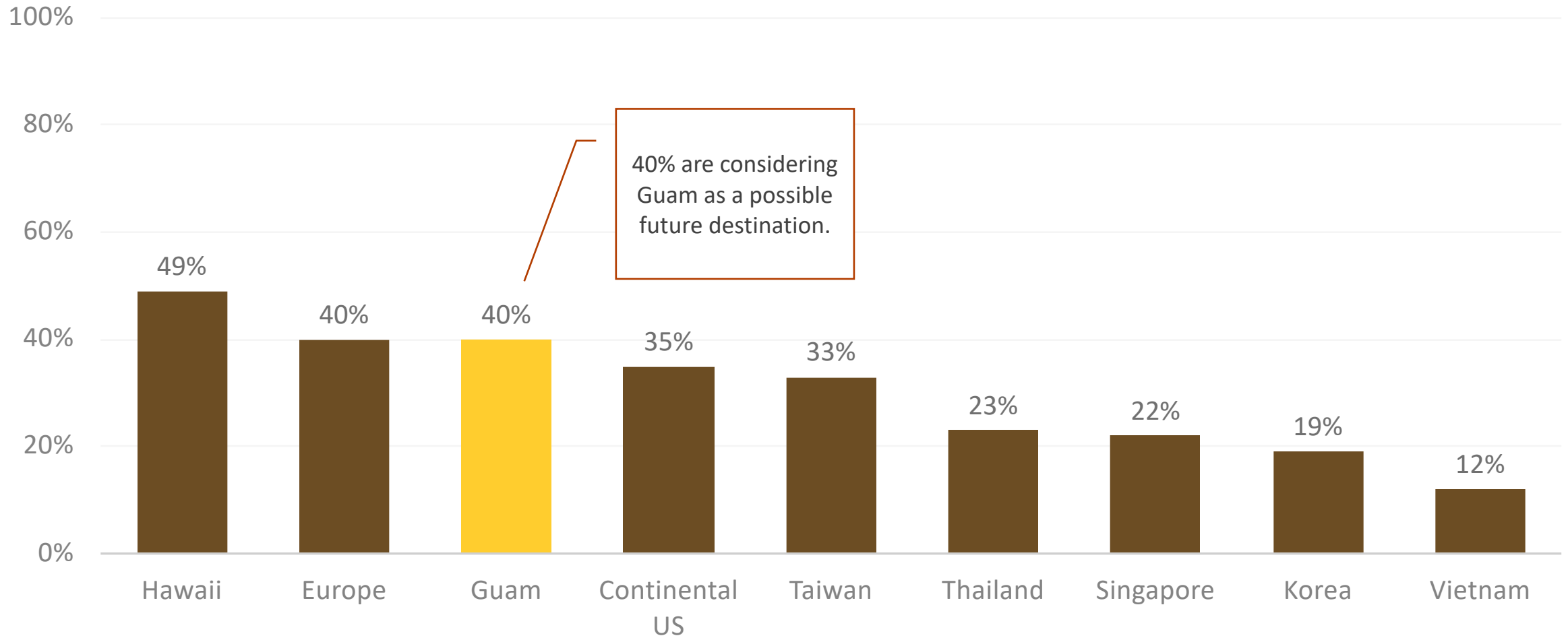
PRIMARY TRAVEL MOTIVATION



FUTURE TRAVEL PLANS



POTENTIAL FUTURE TRAVEL DESTINATIONS



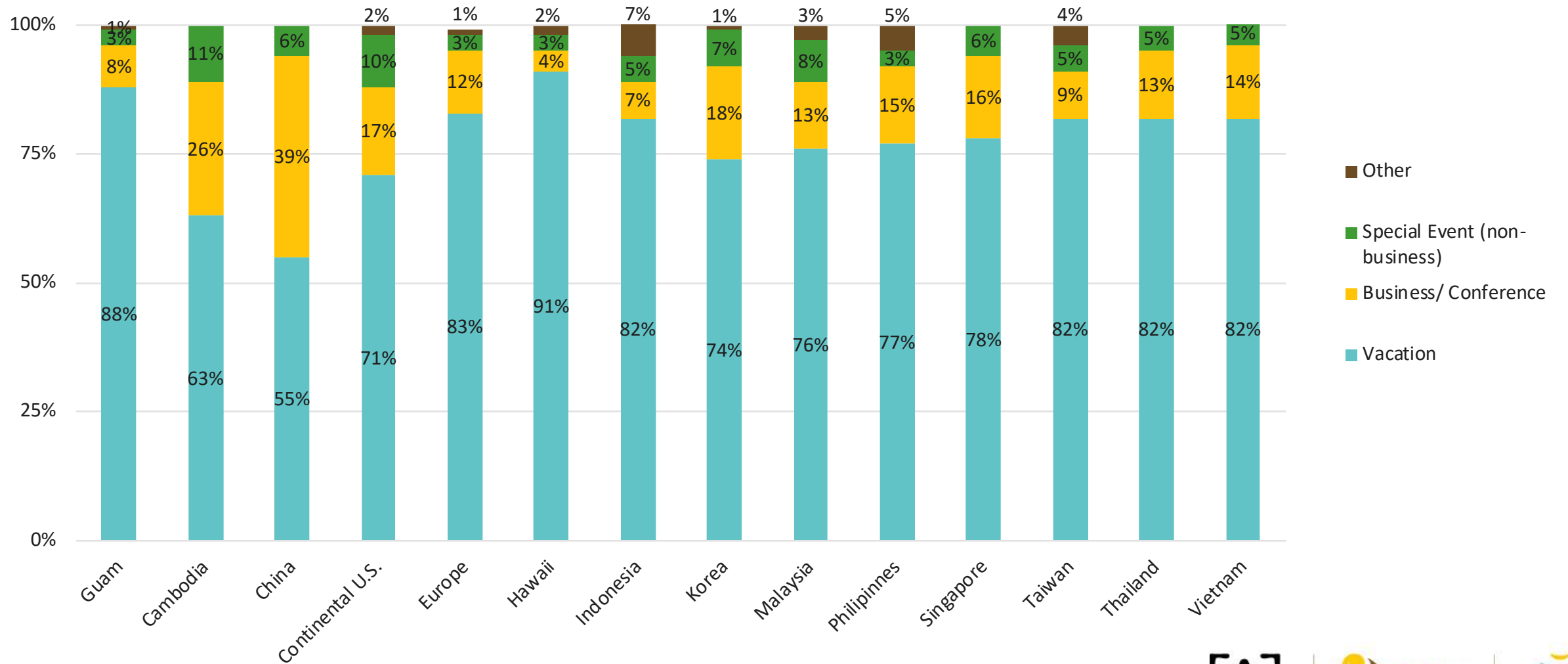
POTENTIAL FUTURE TRAVEL DESTINATIONS

	May 2021	June 2021	Sept 2021	May 2022*
Hawaii	38%	42%	42%	49%
Europe	26%	28%	34%	40%
Guam	30%	21%	29%	40%
Taiwan	25%	25%	23%	33%
Continental U.S.	15%	17%	22%	35%
Singapore	16%	12%	16%	22%
Korea	16%	11%	16%	19%
Thailand	13%	11%	11%	23%
Vietnam	7%	7%	7%	12%
Indonesia	6%	5%	6%	12%

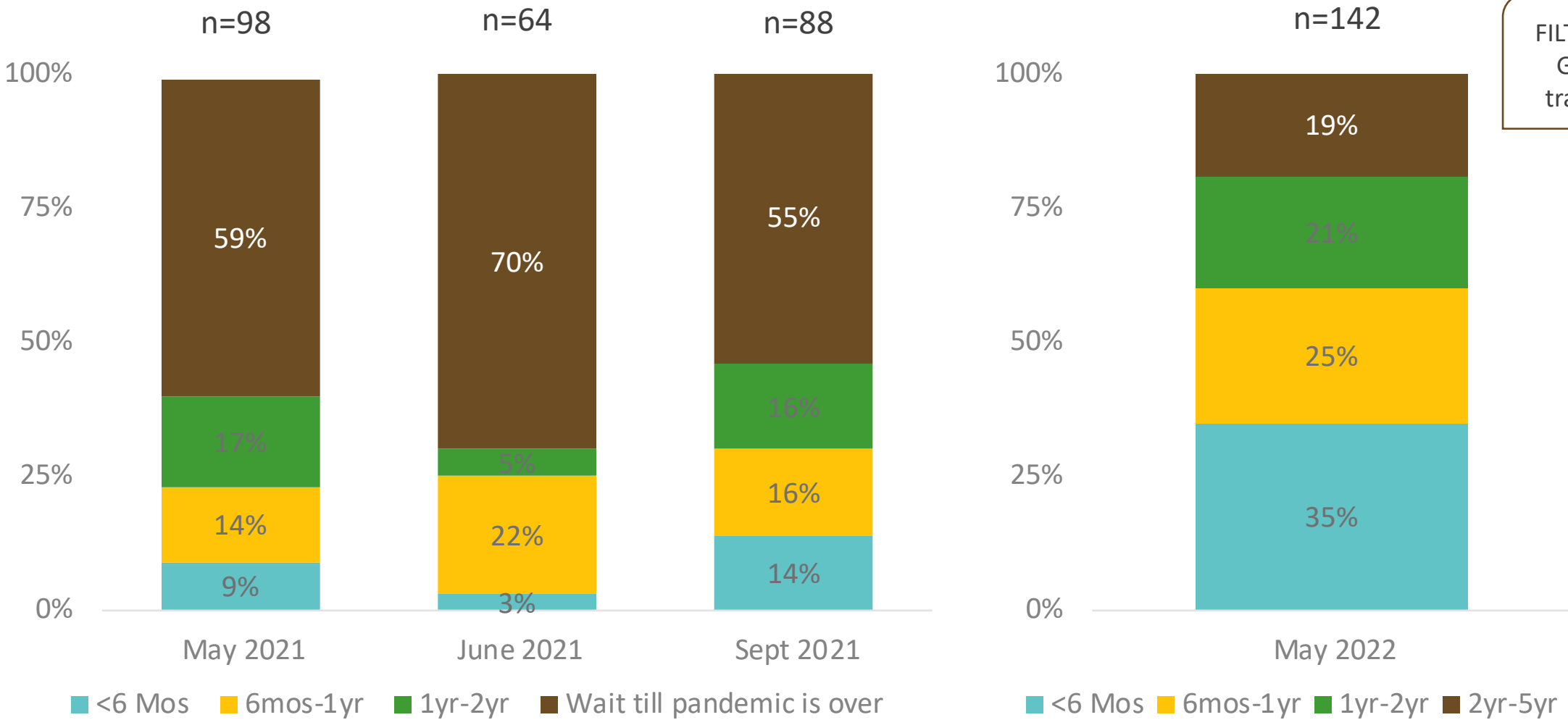
- Travelers from Japan considering Guam as an international destination statistically more likely to be considering nearly all other destinations, except for Europe.



PURPOSE OF INTERNATIONAL TRAVEL



TIMING OF FUTURE TRAVEL TO GUAM



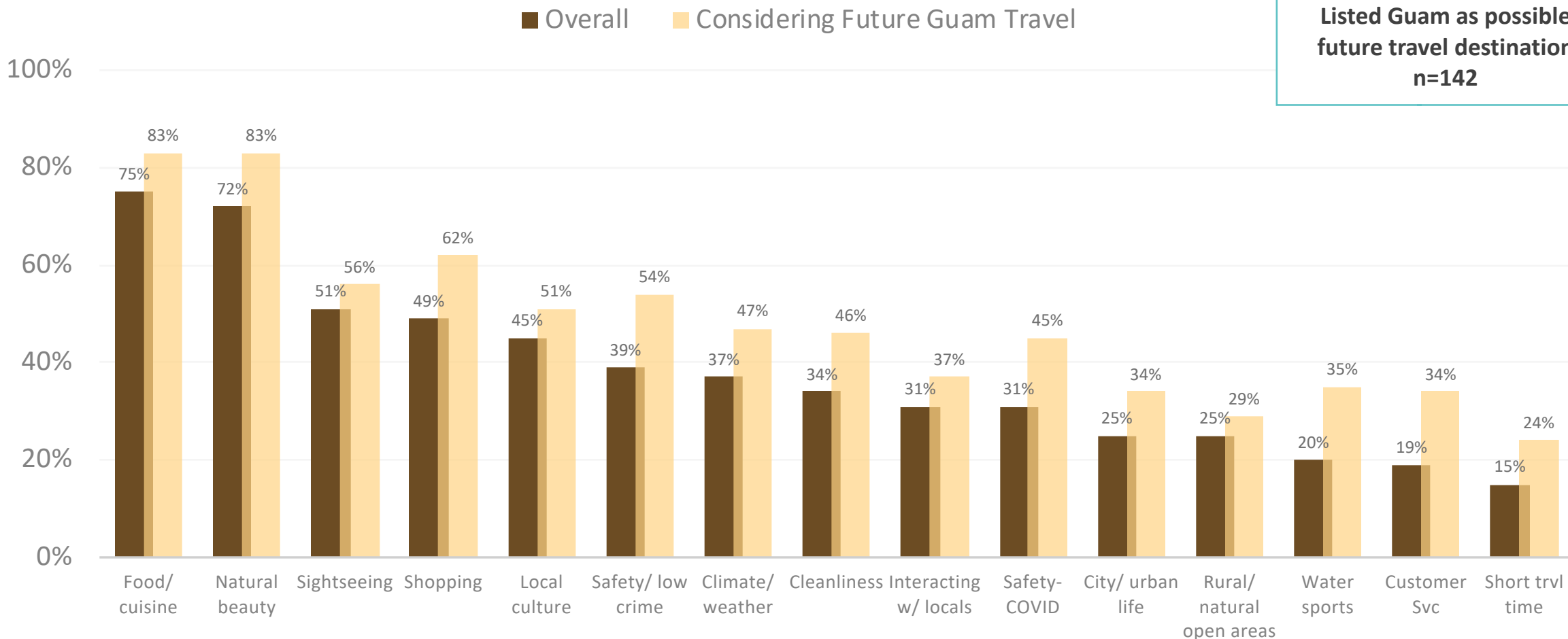
FILTER: Considering Guam as future travel destination

2021 Survey Q: When, if at all, do you intend to take an international trip for vacation purposes outside of Japan?
 2022 Survey Q: When, if at all, do you intend to take an international trip outside of Japan, for any reason?



APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS

Filter:
Listed Guam as possible
future travel destination
n=142



APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS

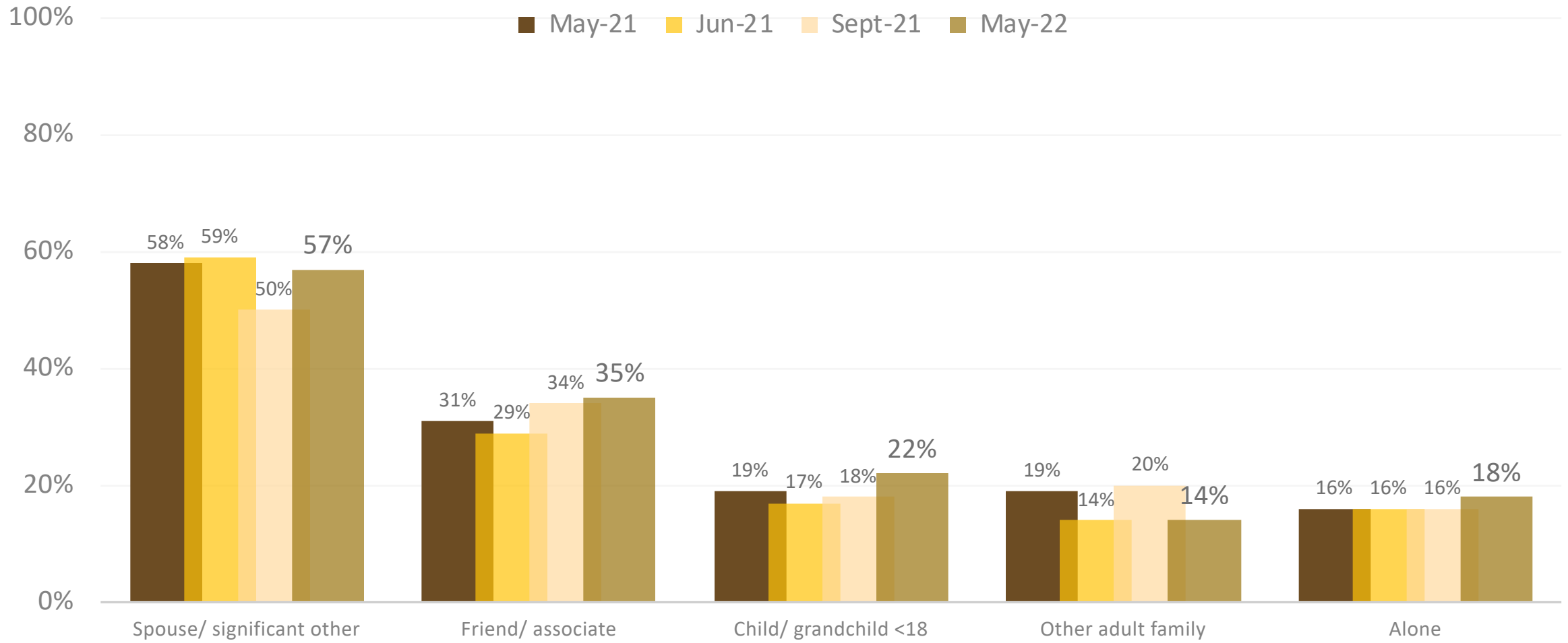
	May 2021	June 2021	Sept 2021	May 2022
Food/ cuisine	59%	61%	69%	75%
Natural beauty	64%	60%	64%	72%
Sightseeing	51%	53%	55%	51%
Shopping	41%	40%	46%	49%
Safety- crime	33%	30%	35%	39%
Local culture	32%	31%	34%	45% ↑
Climate/ weather	27%	26%	29%	37%
Safety- COVID	26%	24%	28%	31%
Cleanliness	21%	21%	25%	34%
Rural/ open spaces	16%	13%	21%	25%
City/ urban life	10%	16%	21%	25%
Interacting w/ locals	16%	10%	17%	31% ↑
Water sports	13%	8%	9%	20%
Price of the destination	8%	8%	16%	18% ↑
Recreational activities	7%	7%	10%	25%
Short travel distance	11%	8%	11%	15% ↑
Sports events	4%	6%	6%	10%
Medical treatment/service	4%	4%	5%	12%
Business/conference	-	-	-	6% ↑

↑ Indicates statistically significant increase from Sept 2021.

Q: What is appealing about those places?



FUTURE INTERNATIONAL TRAVEL PARTY



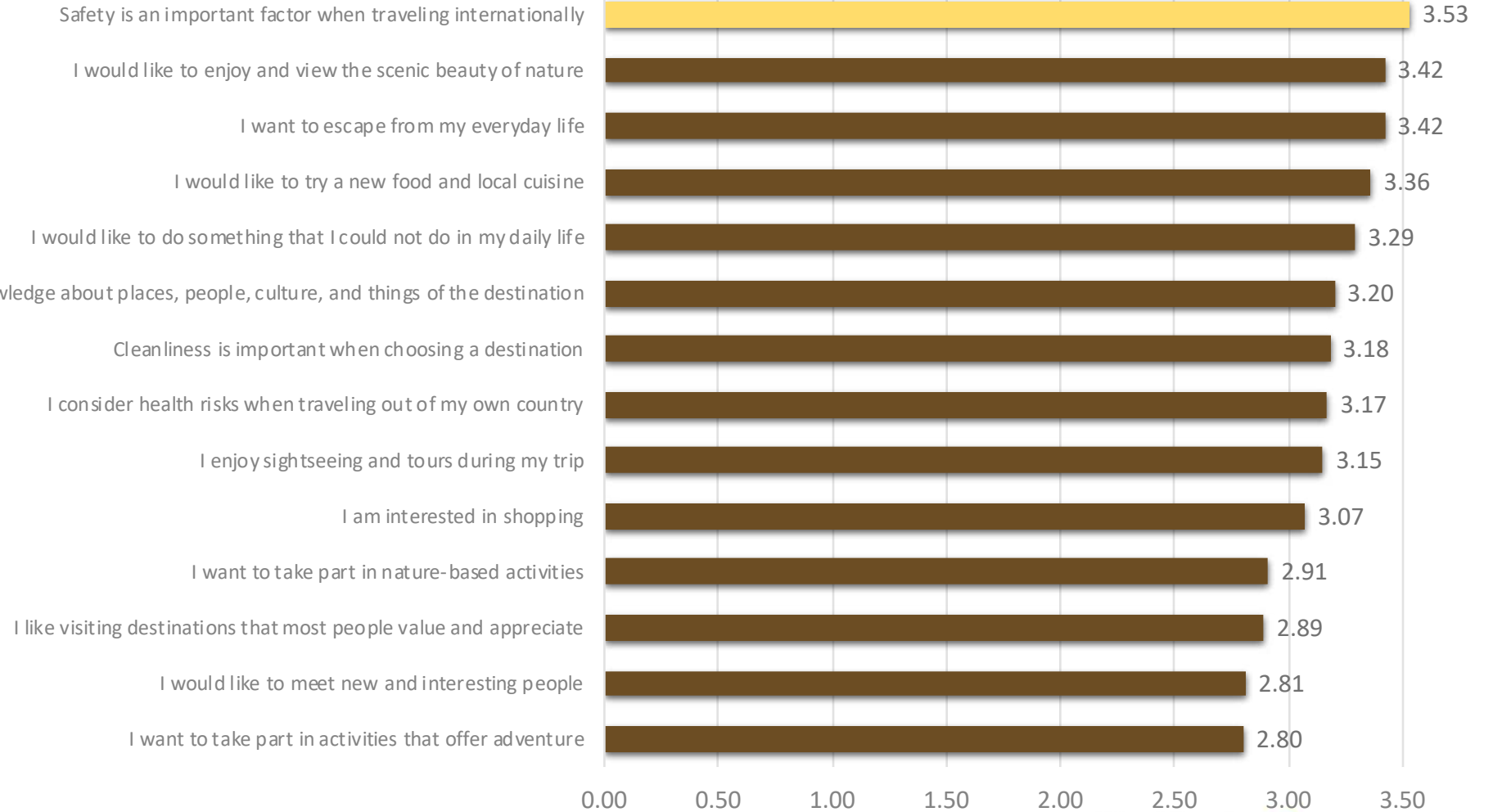
Note: Question updated in 2022 to emphasize once COVID-19 restrictions are lifted. Q: Thinking of your travel plans after COVID-19-related travel restrictions are lifted, who are you most looking forward to traveling with to an international destination?



DESTINATION SELECTION FACTORS – IMPORTANCE

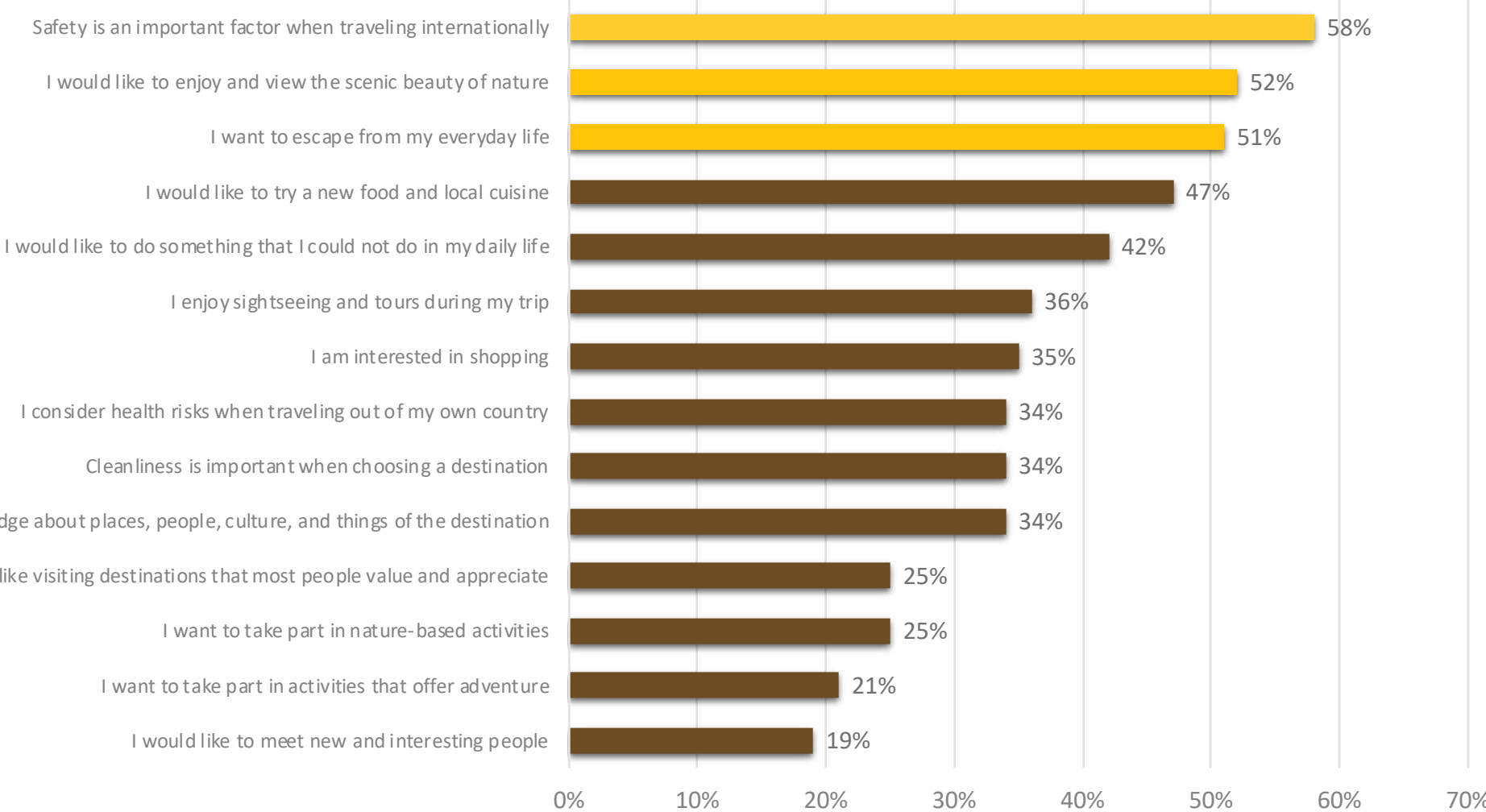
MEAN SCORE 4PT SCALE

Importance of “I consider health risks when traveling out of my own country” has dropped significantly since Sept. 2021, from 3.41 mean to 3.17 mean.



DESTINATION SELECTION FACTORS – VERY IMPORTANT / TOP BOX

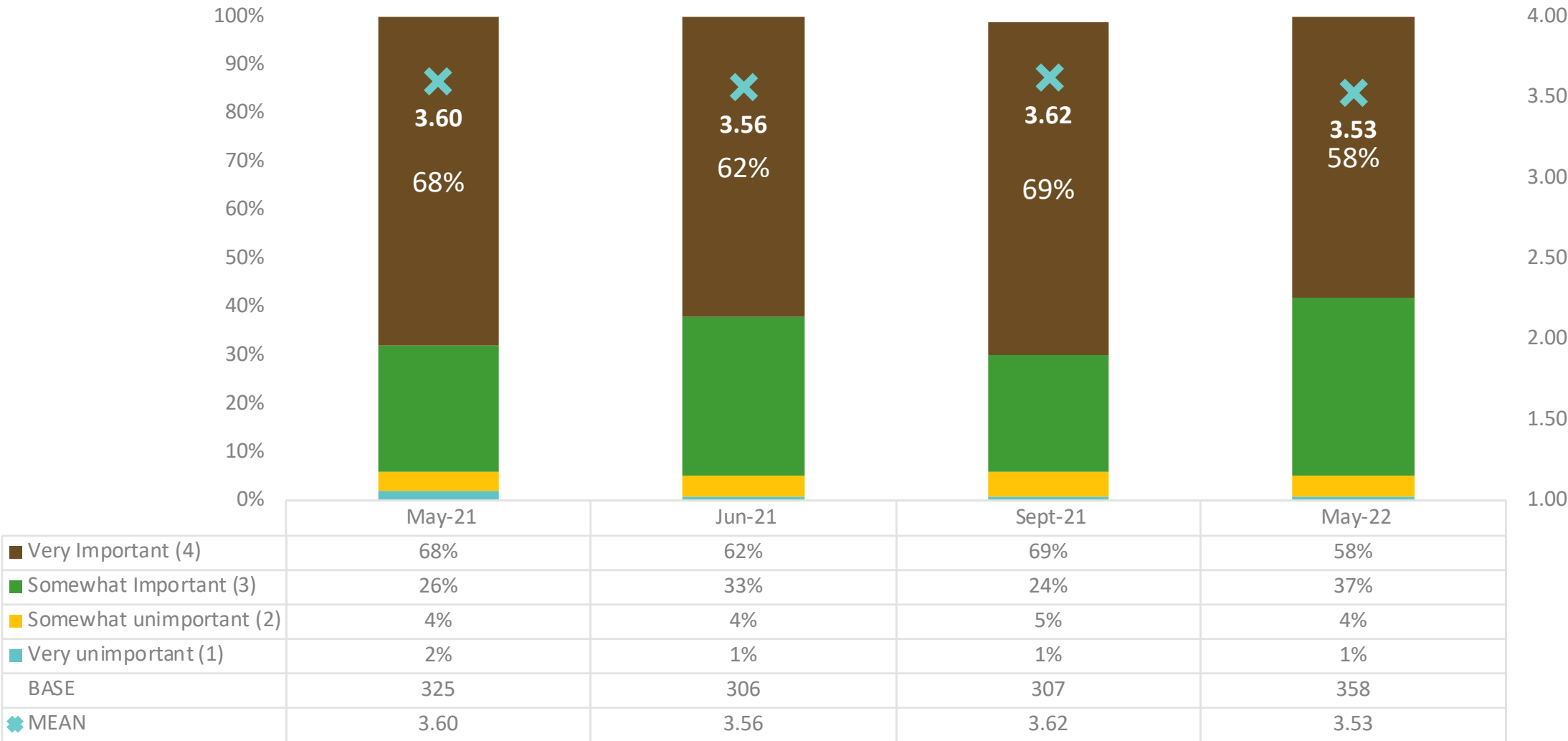
Just three (yellow) selection factor received a top box (very important) score above 50%



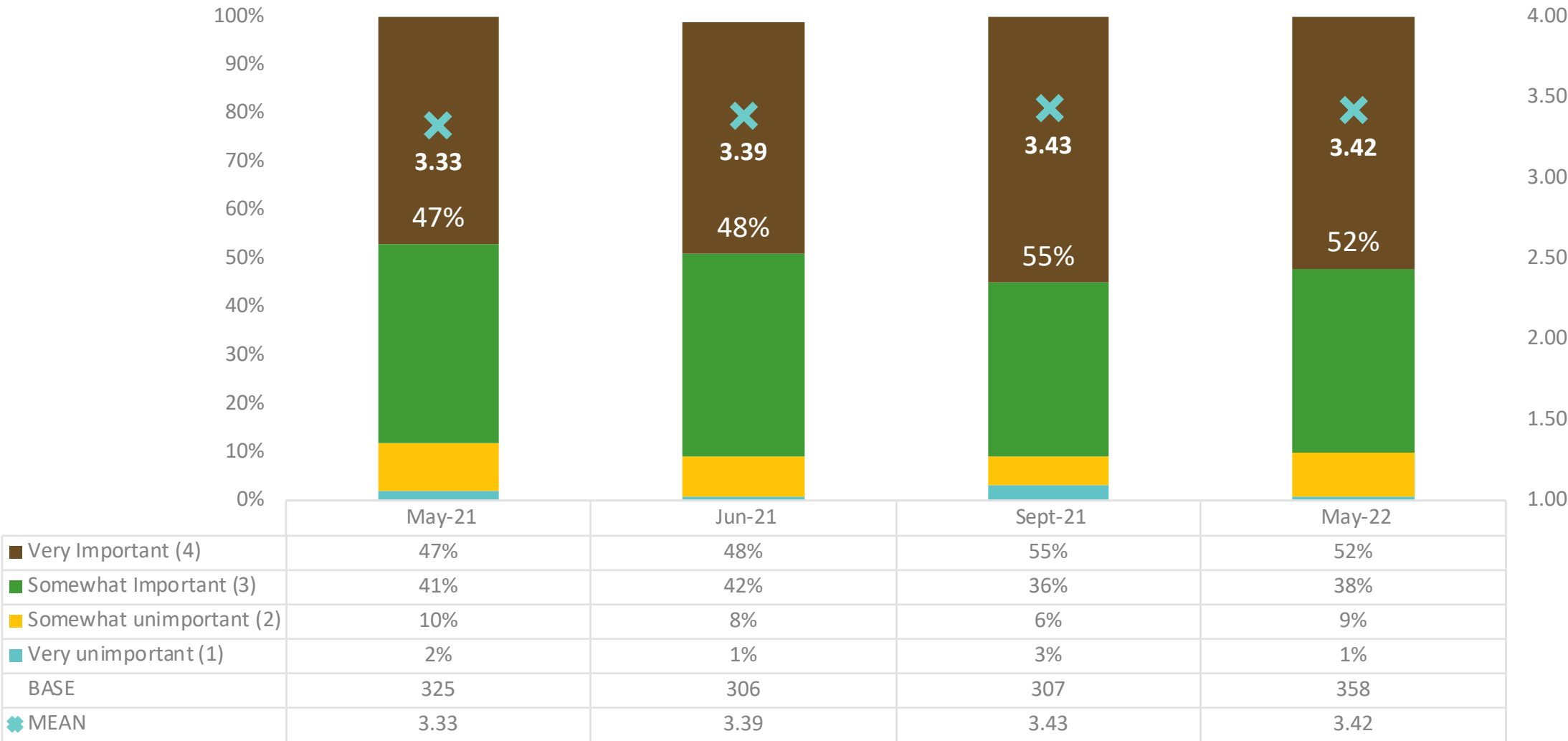
Q: Which two of these things are MOST important to you when you travel?
 Note: In 2022, variable "I enjoy sightseeing and tours during my trip" was changed from "...during my vacation"



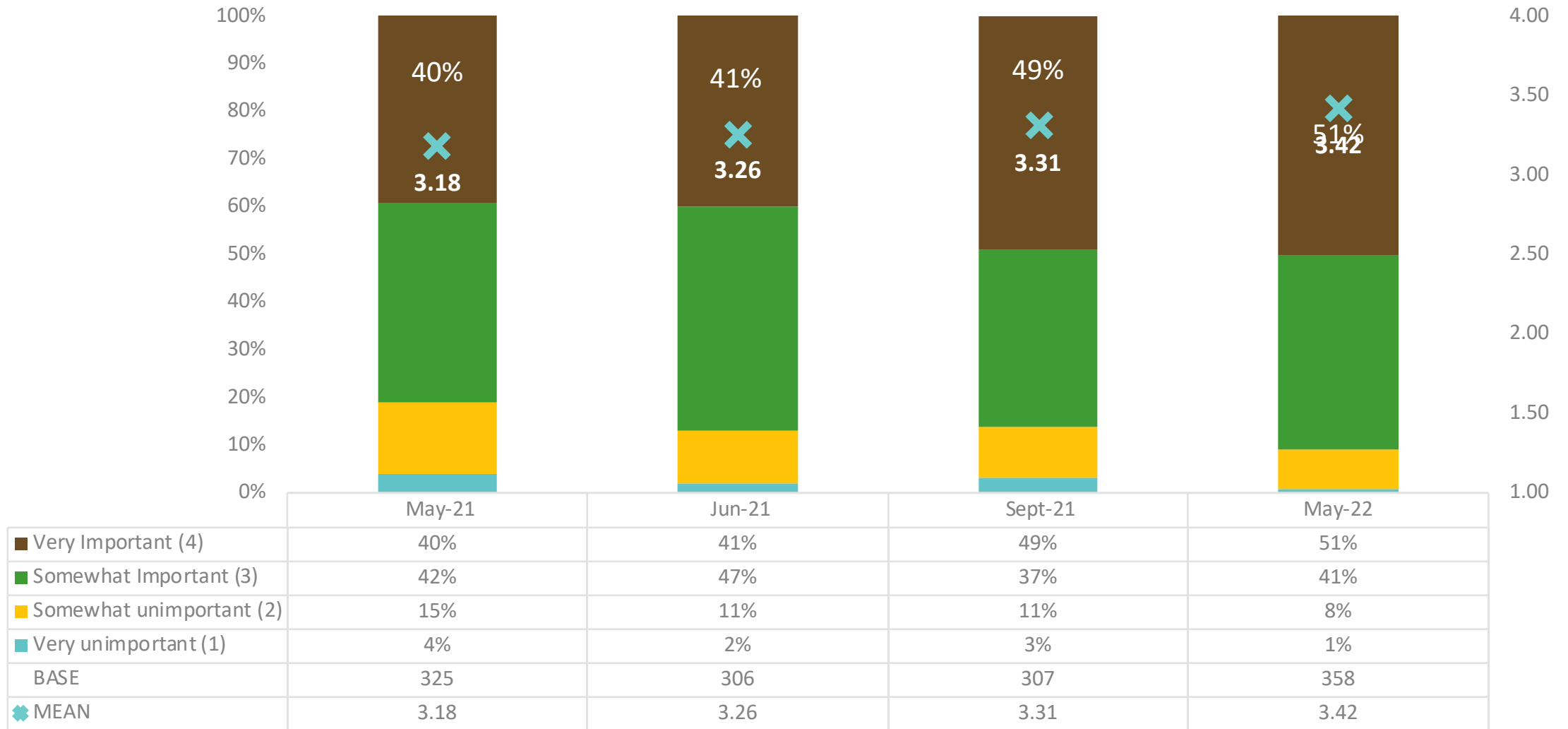
Safety is an important factor when traveling internationally



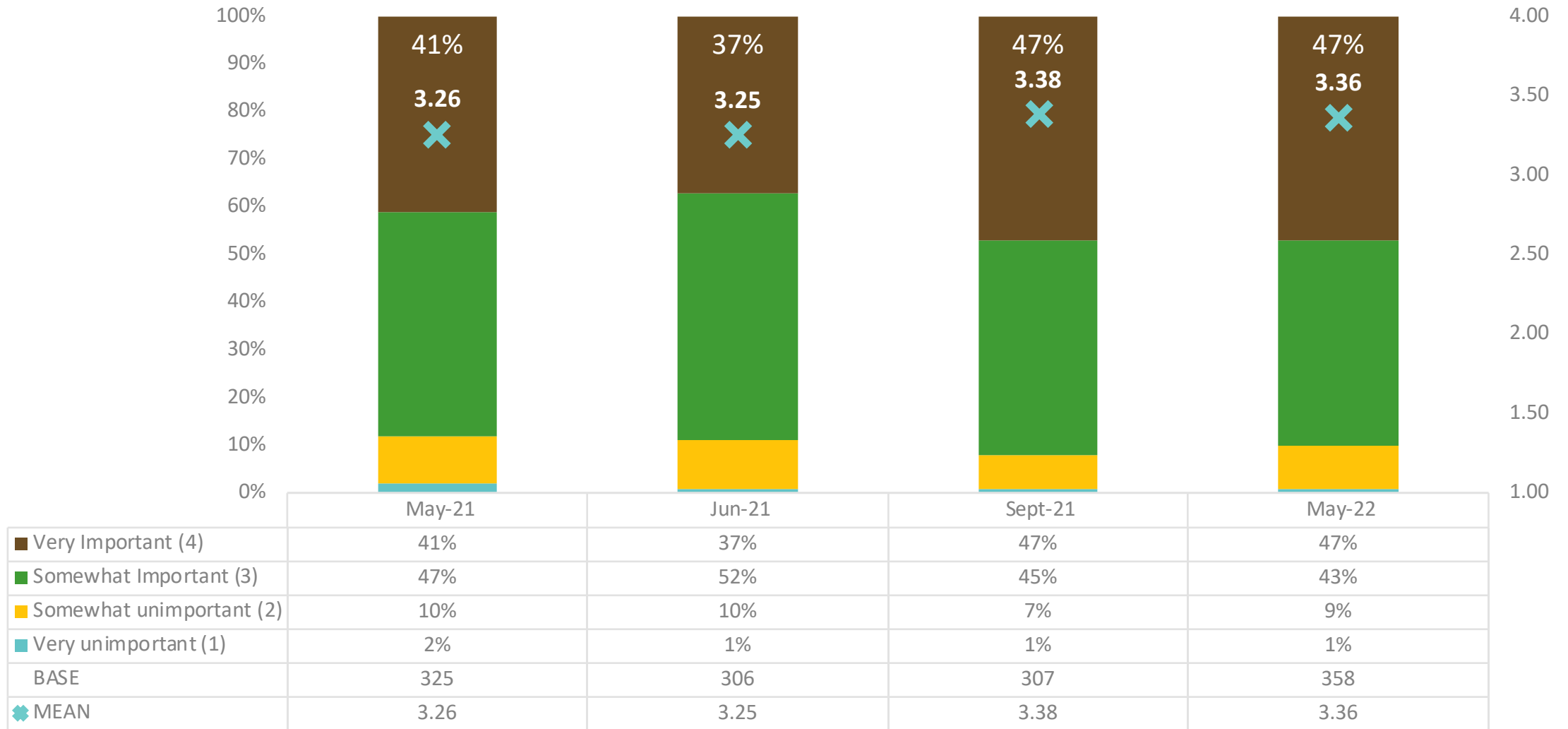
I would like to enjoy and view the scenic beauty of nature



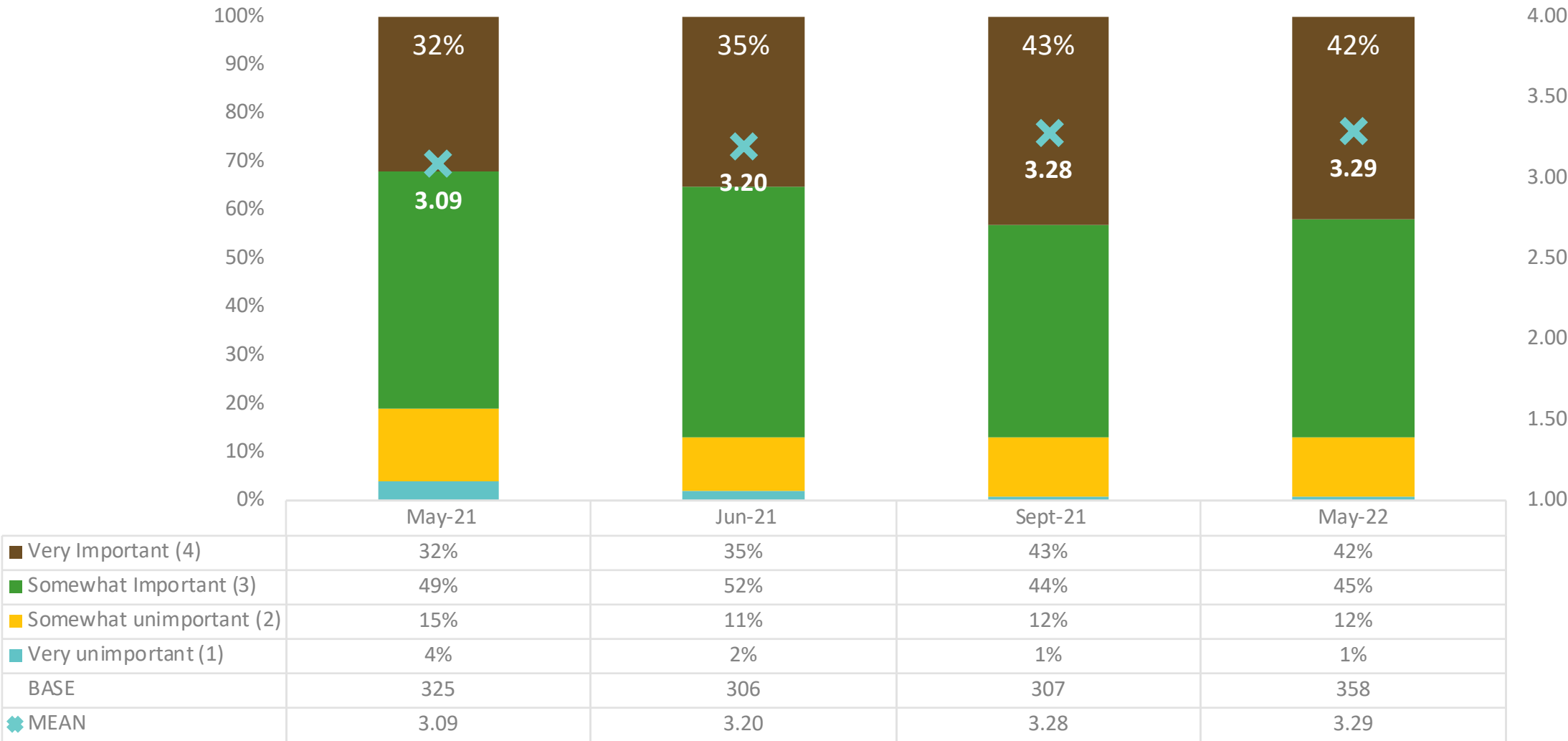
I want to escape my everyday life



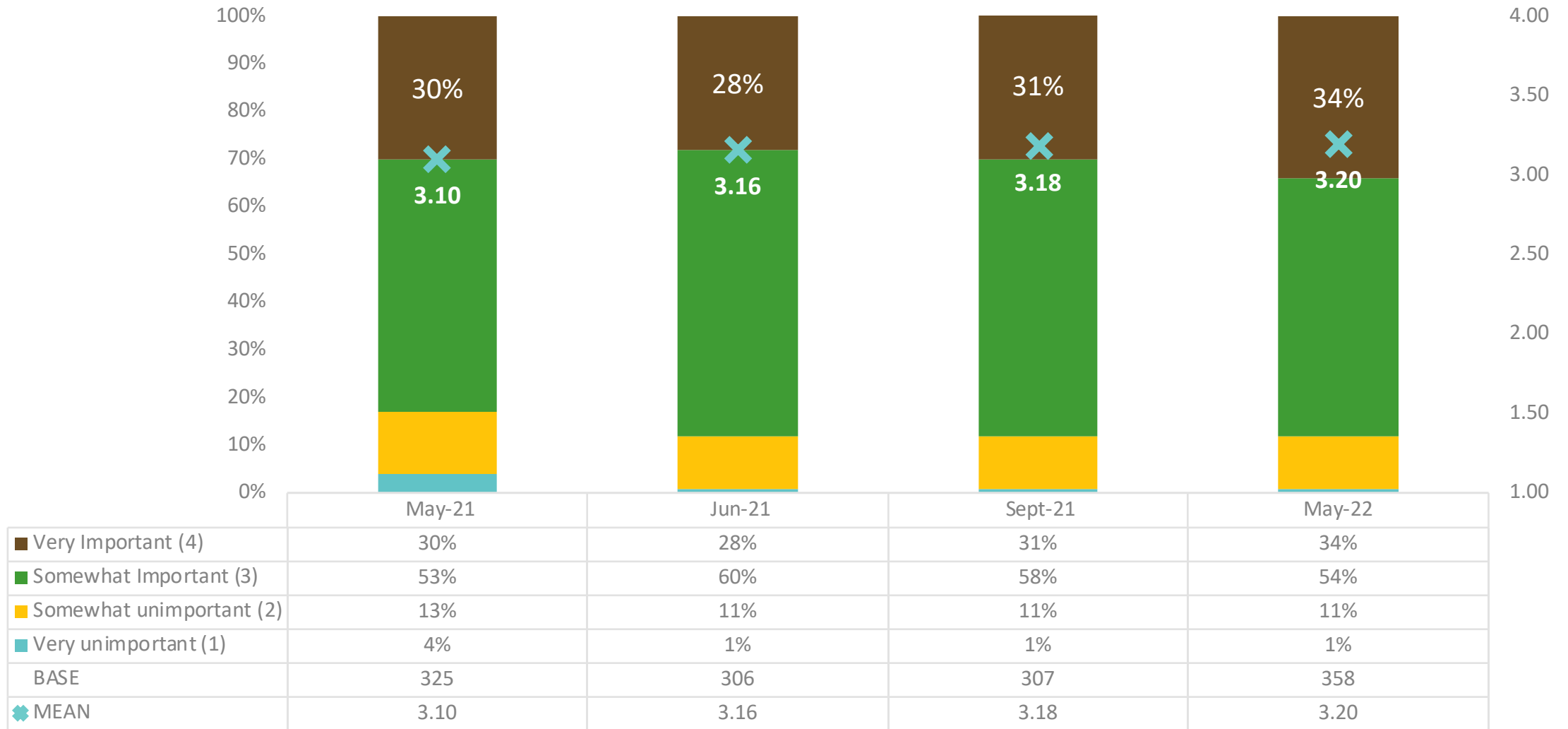
I would like to try a new food and local cuisine



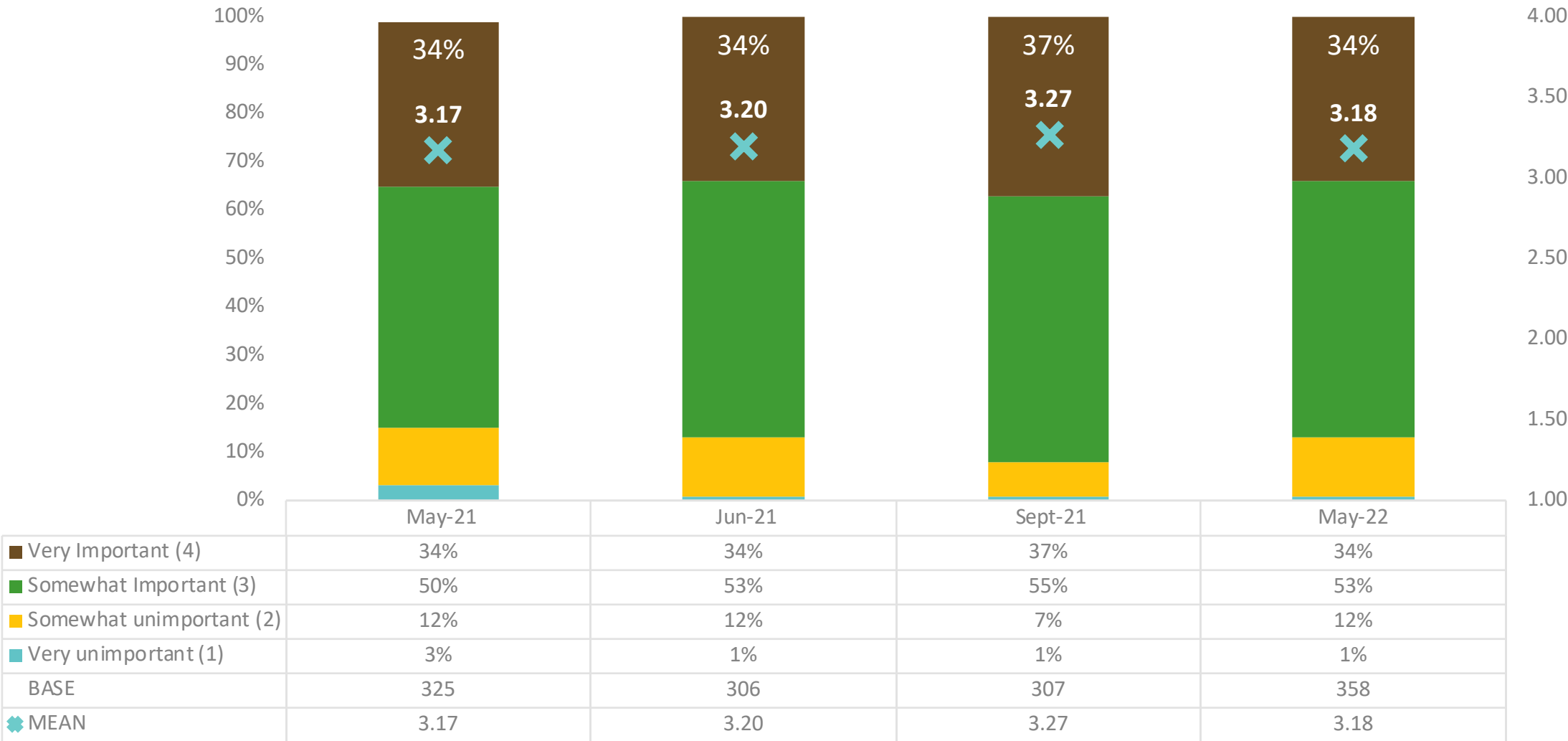
I would like to do something that I could not do in my daily life



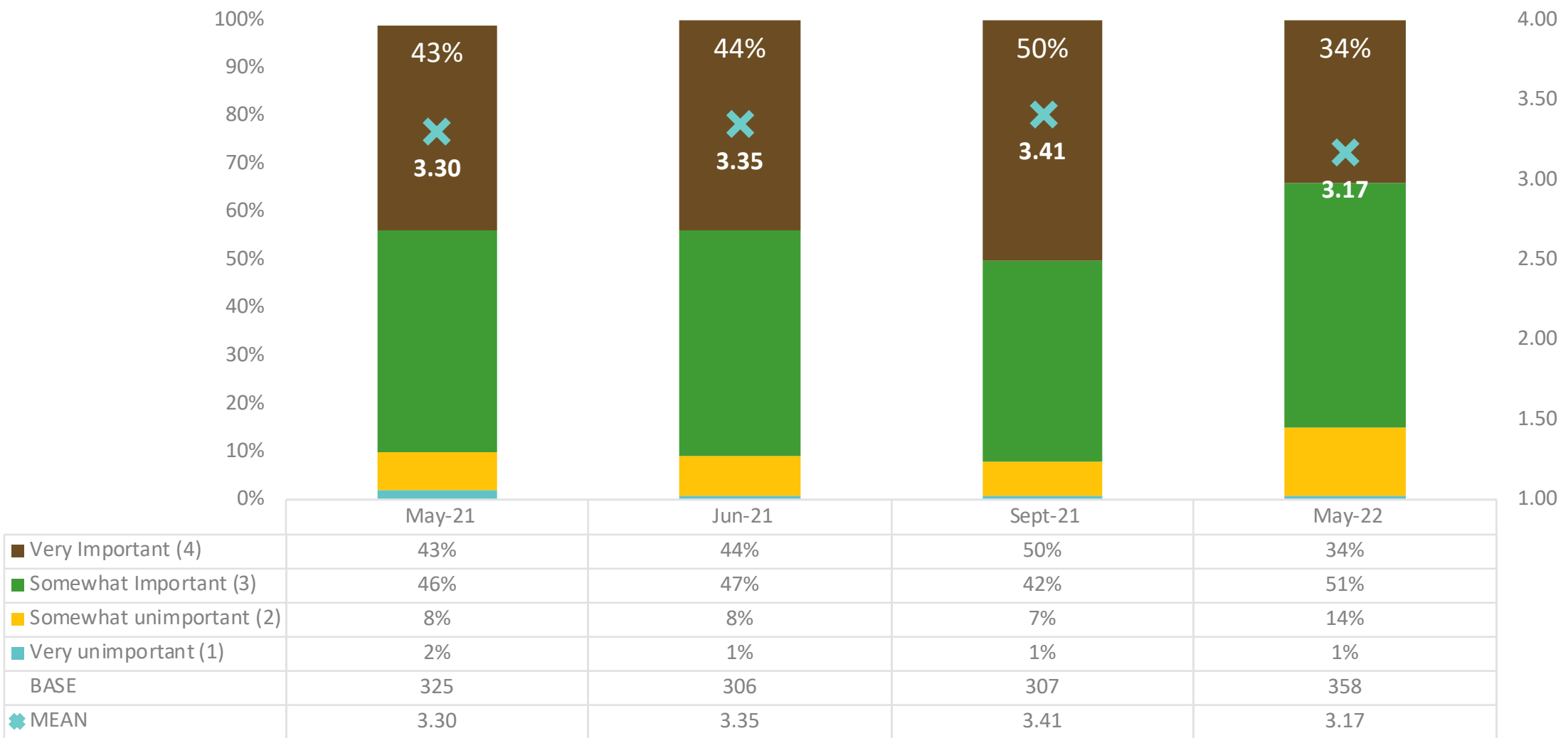
I would like to increase my knowledge about places, people, culture, and things of the destination



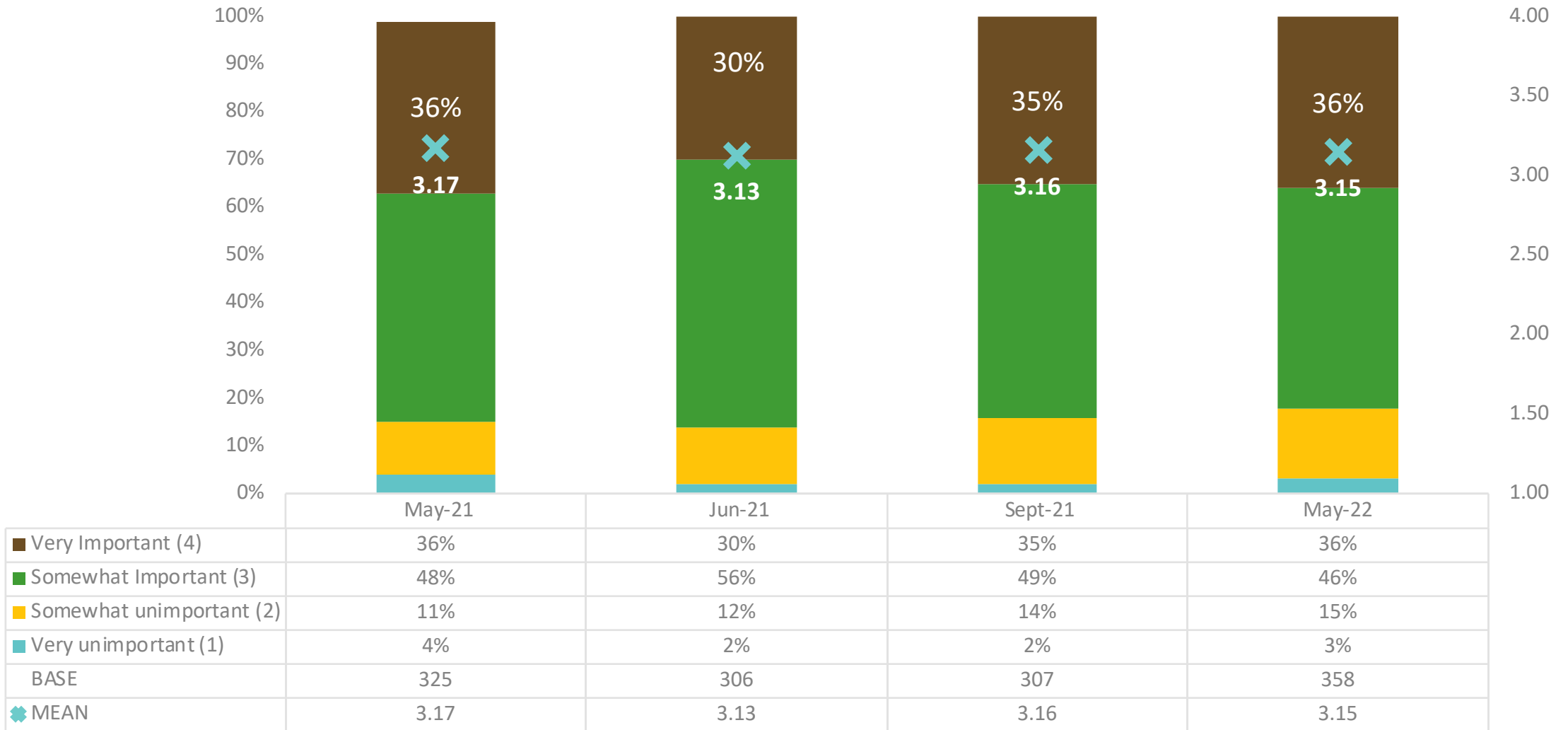
Cleanliness is important when choosing a destination



I consider health risks when traveling out of my own country



I enjoy sightseeing and tours during my trip



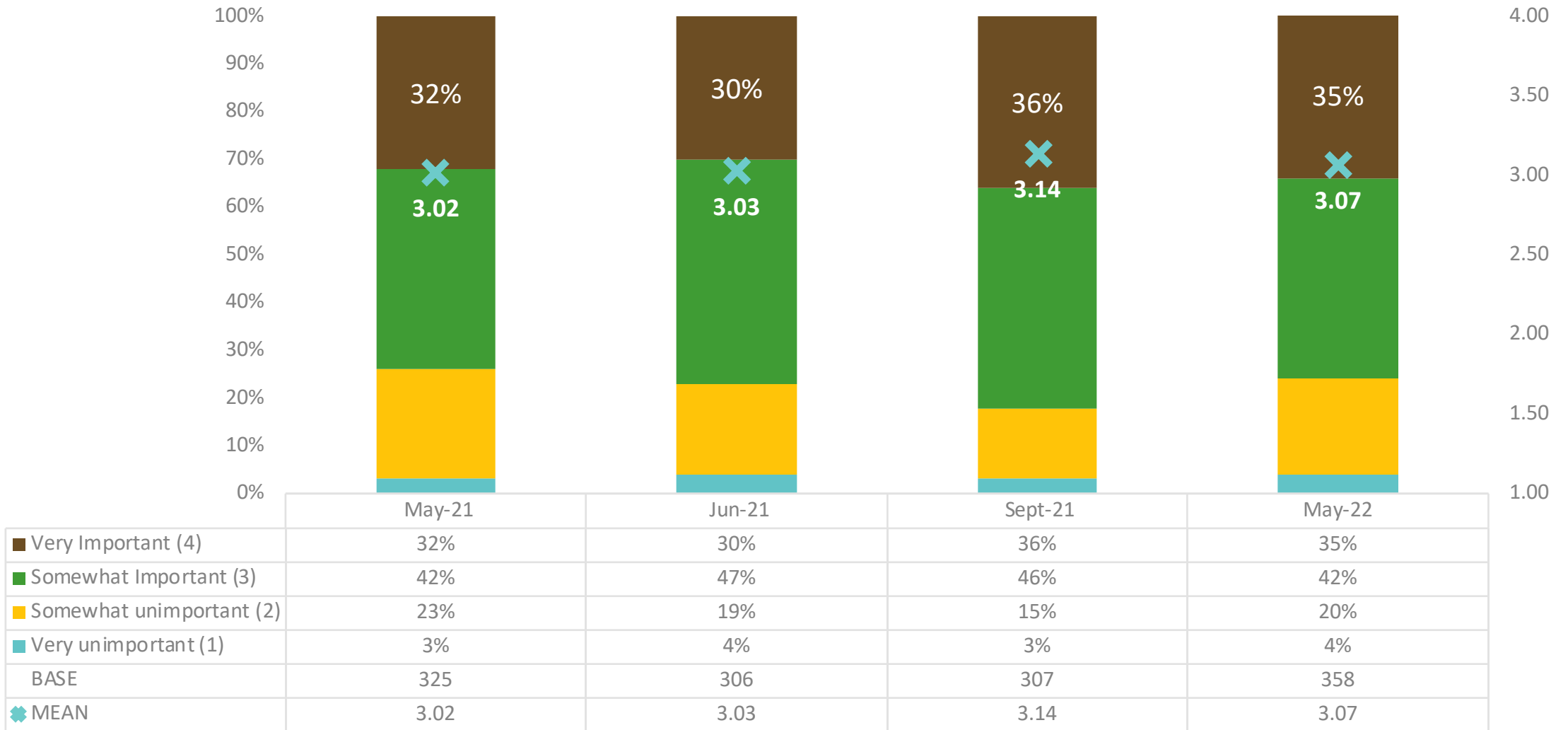
Q: When considering a destination to visit, how important are each of the following in your decision of where to go?

Note: 2022 variable: "I enjoy sightseeing and tours during my trip"

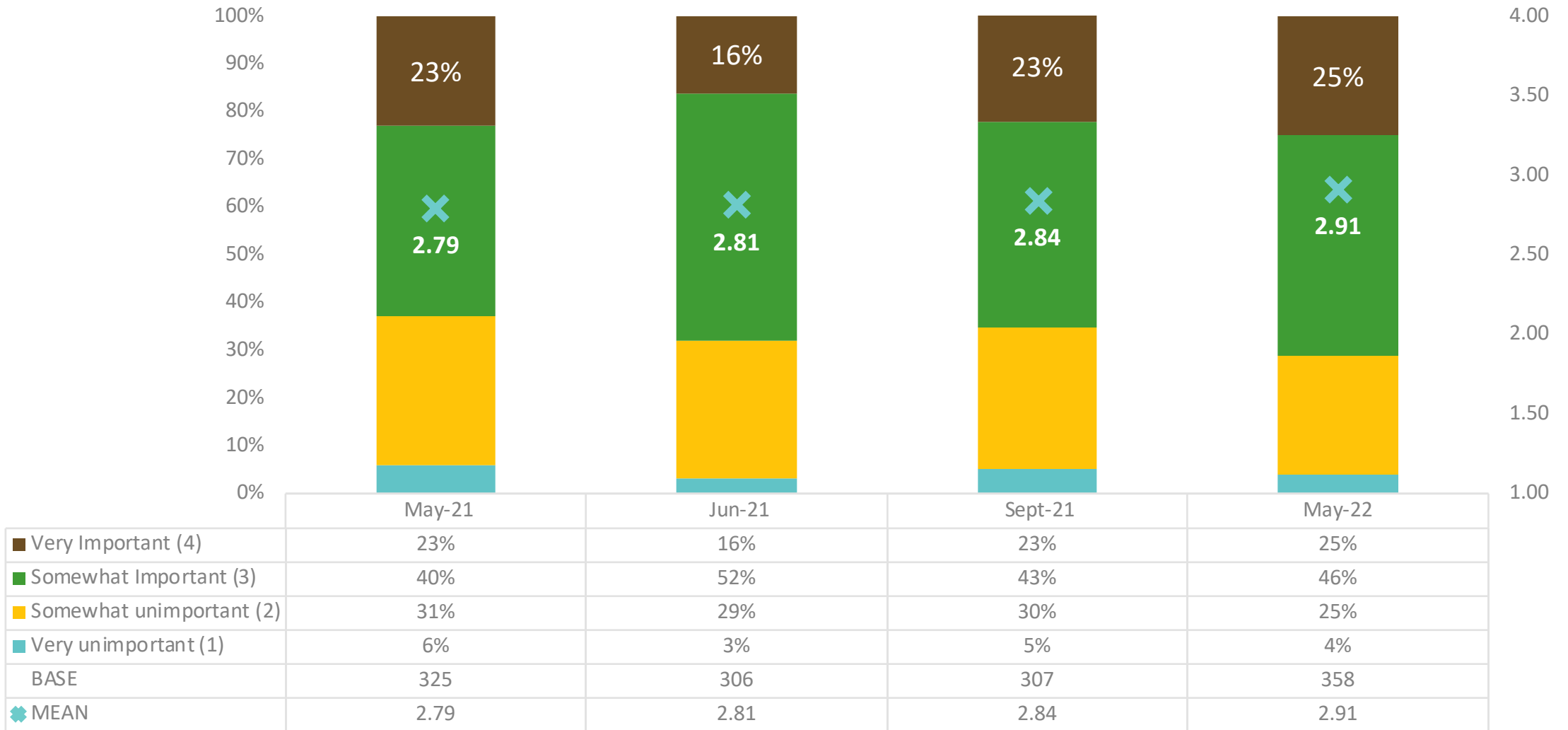
Note 2021 variable: "I enjoy sightseeing and tours during my vacation"



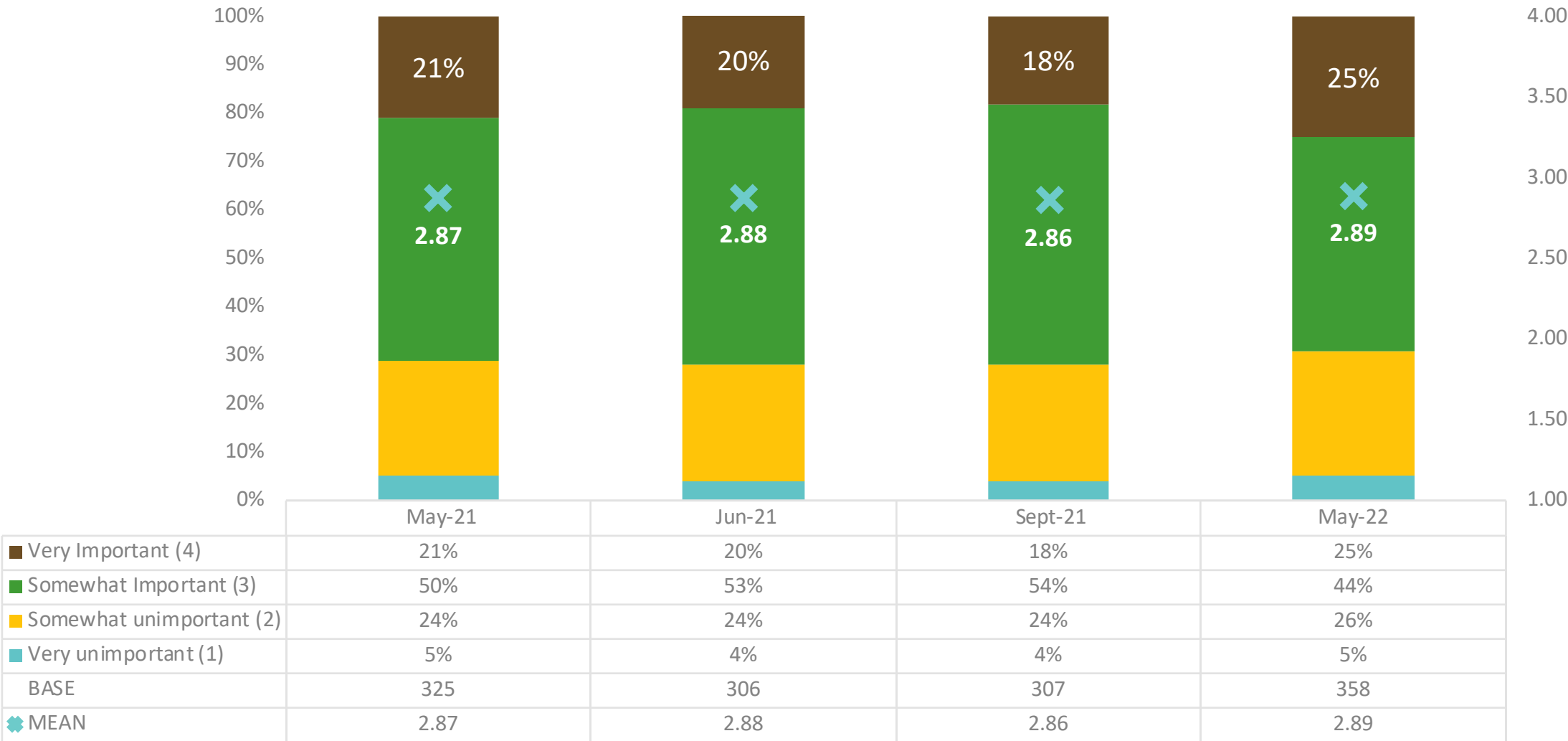
I am interested in shopping



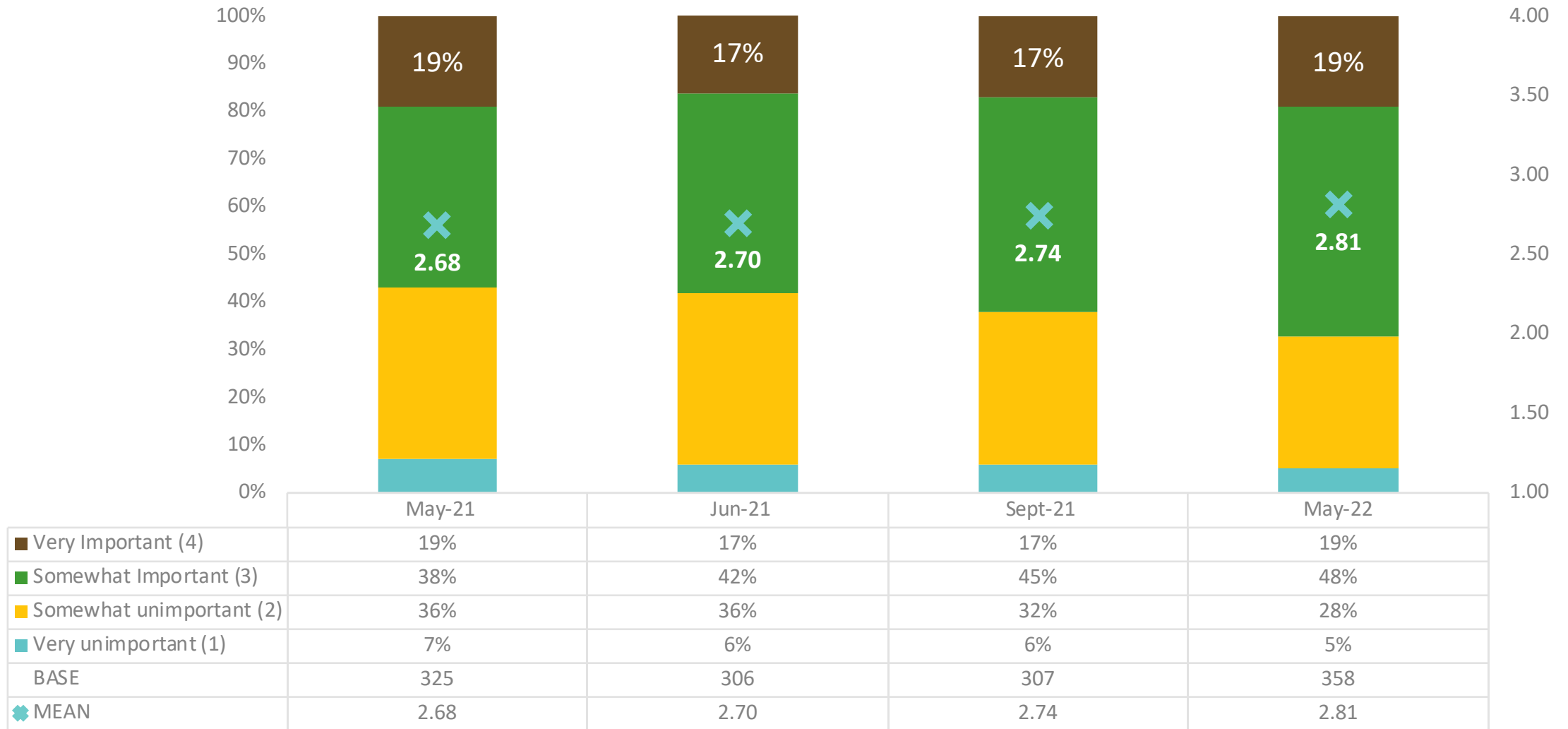
I want to take part in nature-based activities



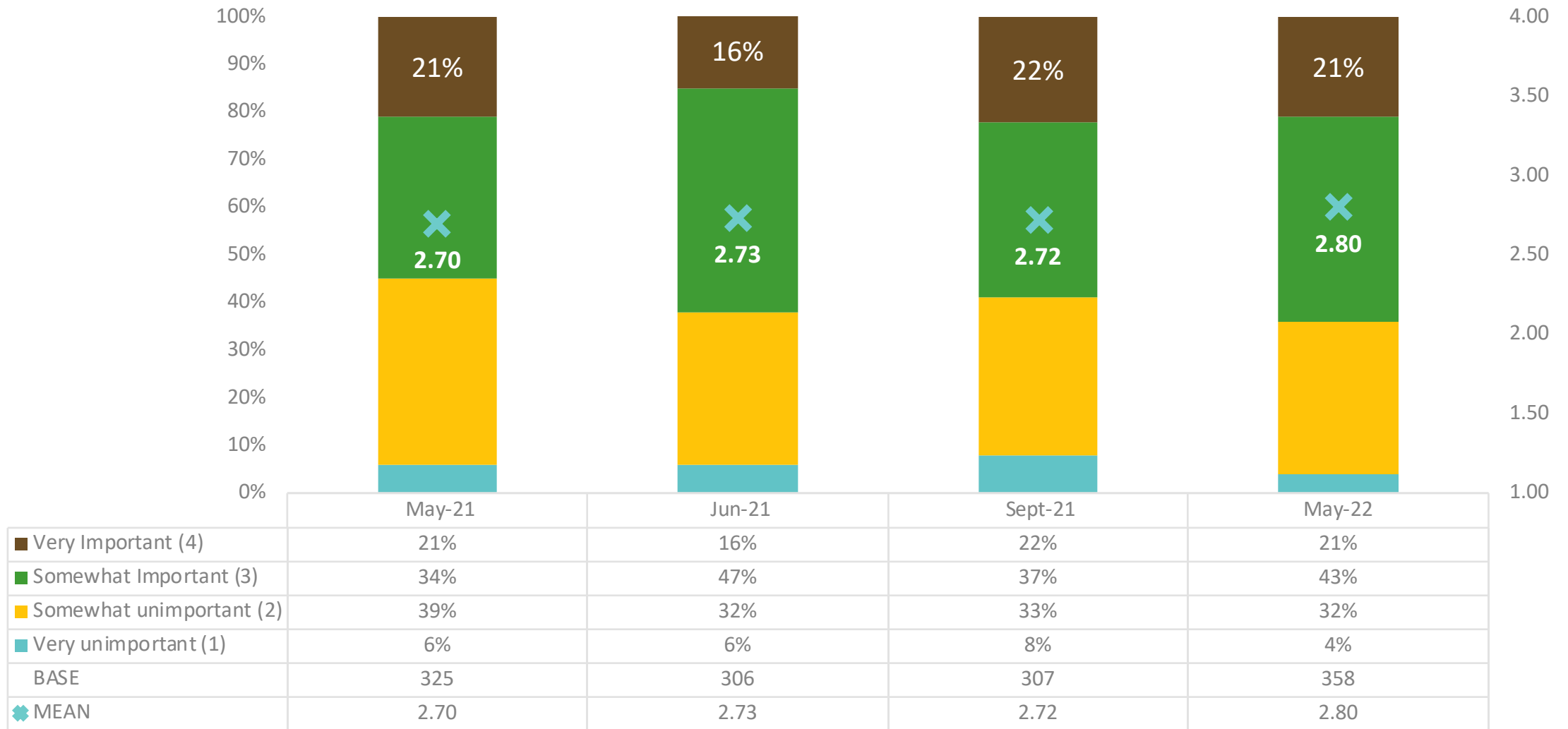
I like visiting destinations that most people value and appreciate



I would like to meet new and interesting people

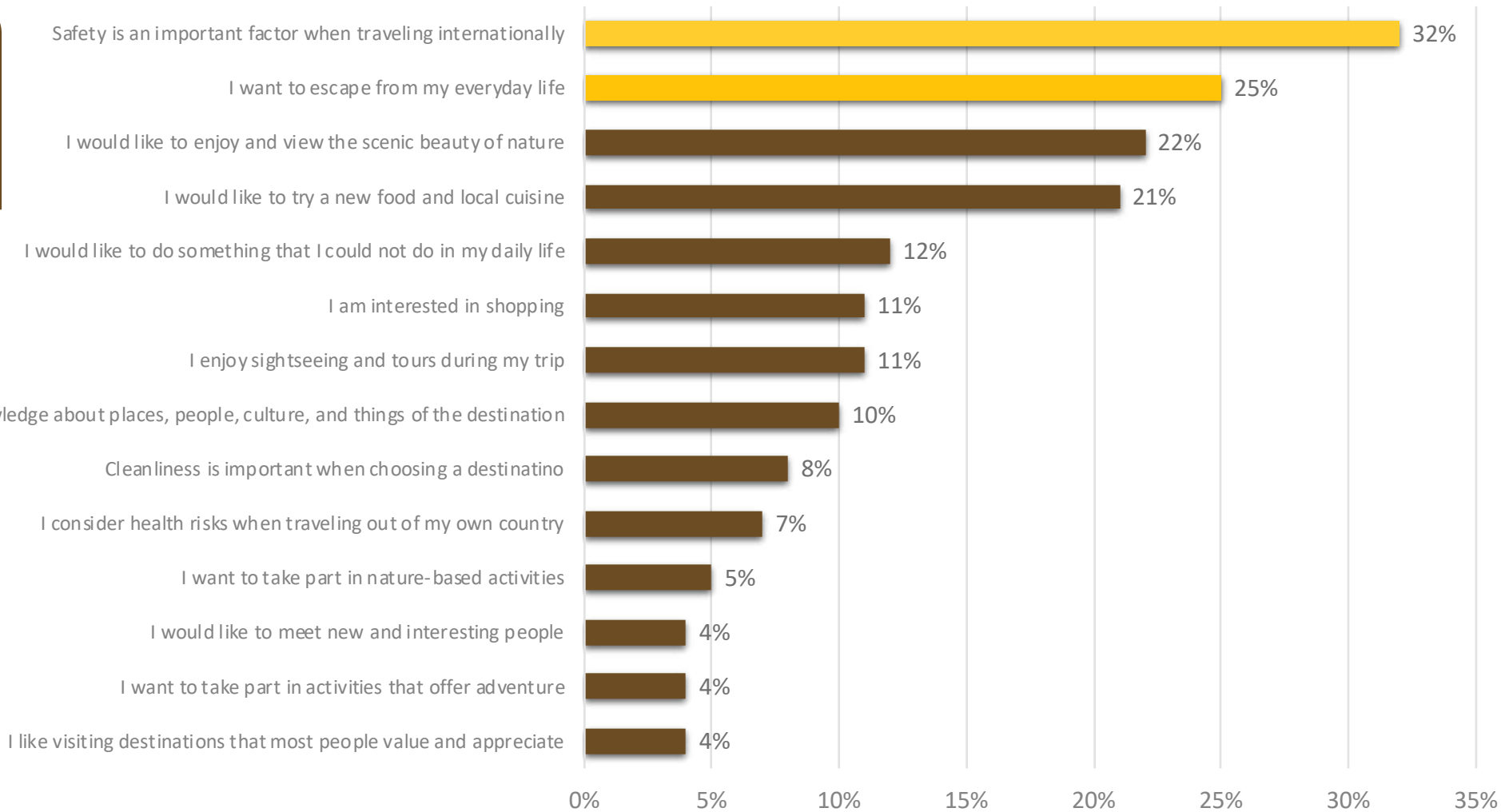


I want to take part in activities that offer adventure



DESTINATION SELECTION FACTORS – TOP TWO

The two most important selection factors were safety and to escape from everyday life.



Base
n=316



DESTINATION SELECTION FACTORS – TOP TWO

	May 2021	June 2021	Sept 2021	May 2022
BASE	278	267	280	316
<i>Safety is an important factor when travelling internationally</i>	46%	40%	44%	32%
<i>I would like to enjoy and view the scenic beauty of nature</i>	19%	21%	22%	22%
<i>I want to escape from my everyday life</i>	13%	12%	20%	25%
<i>I would like to try a new food and local cuisine</i>	15%	21%	19%	21%
<i>I consider health risks when travelling out of my own country</i>	14%	13%	14%	7%
<i>I am interested in shopping</i>	10%	12%	14%	11%
<i>I would like to do something that I could not do in my daily life</i>	8%	12%	13%	12%
<i>I enjoy sightseeing and tours during my vacation</i>	11%	9%	11%	11%
<i>I would like to increase my knowledge about places, people, culture, and things of the destination</i>	9%	11%	9%	10%
<i>Cleanliness is important when choosing a destination</i>	10%	6%	4%	8%
<i>I would like to meet new and interesting people</i>	4%	3%	3%	4%
<i>I want to take part in activities that offer adventure</i>	4%	2%	3%	4%
<i>I like visiting destinations that most people value and appreciate</i>	5%	2%	2%	4%
<i>I want to take part in nature-based activities</i>	3%	1%	2%	5%



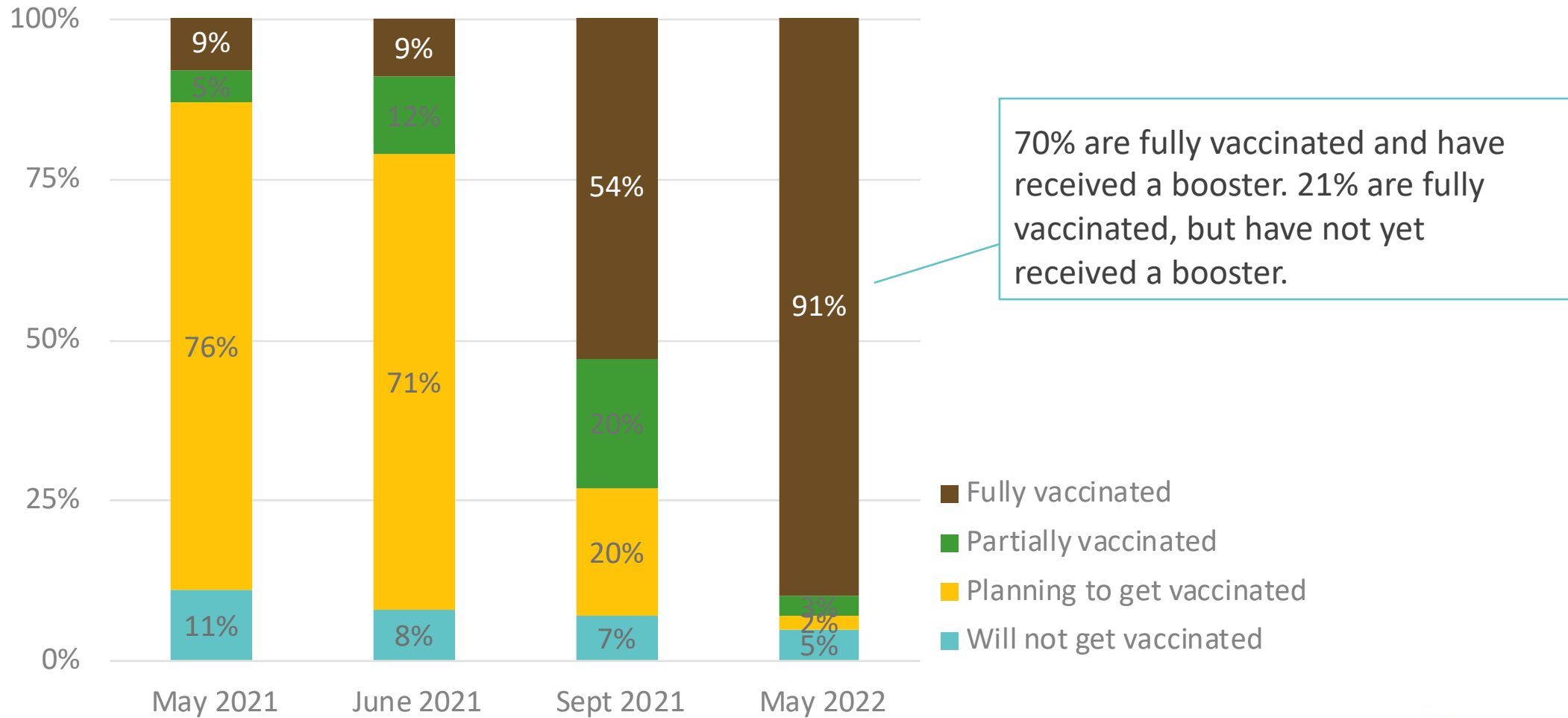


SECTION 2

COVID-19

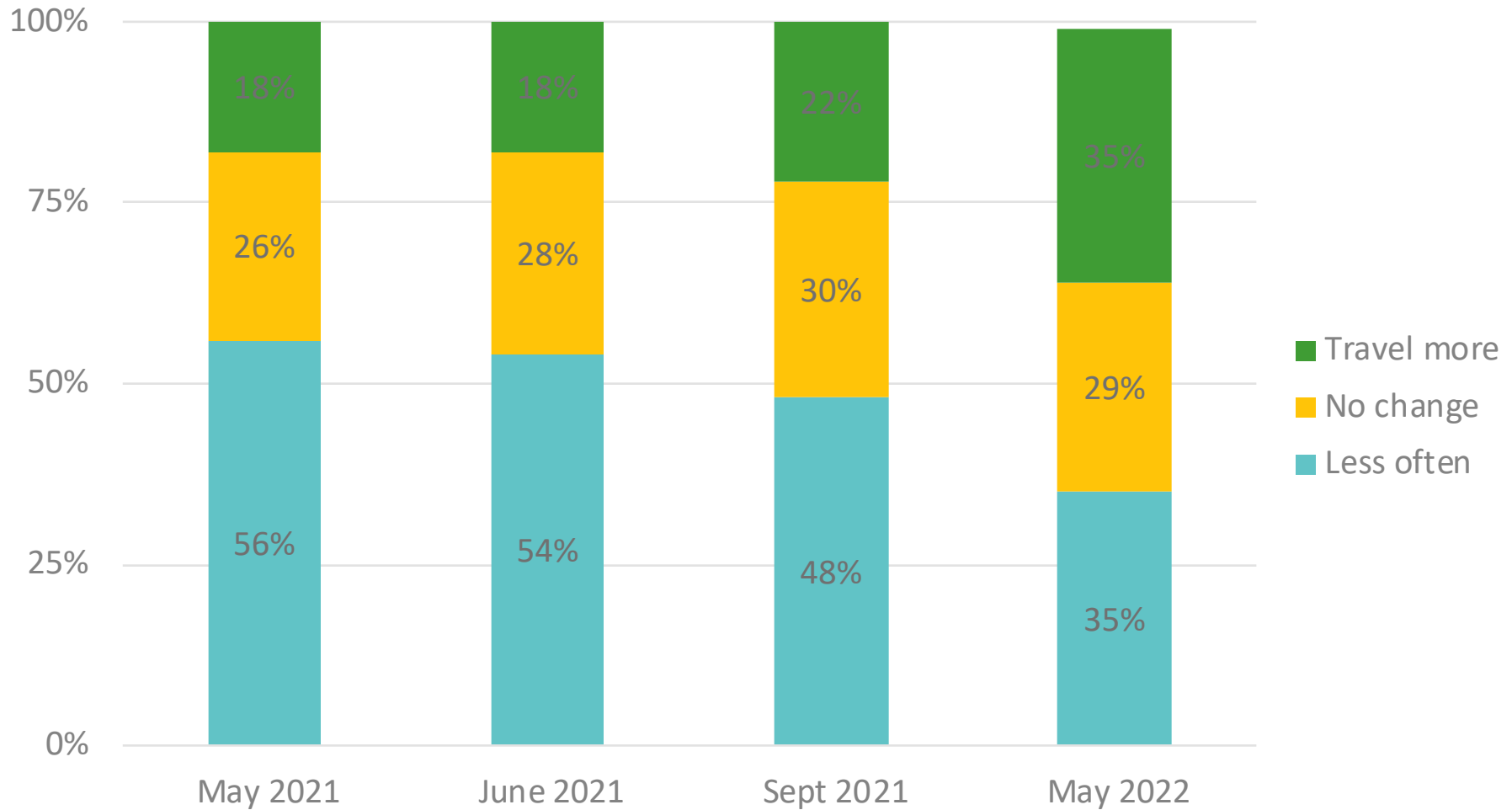


COVID-19 VACCINE STATUS



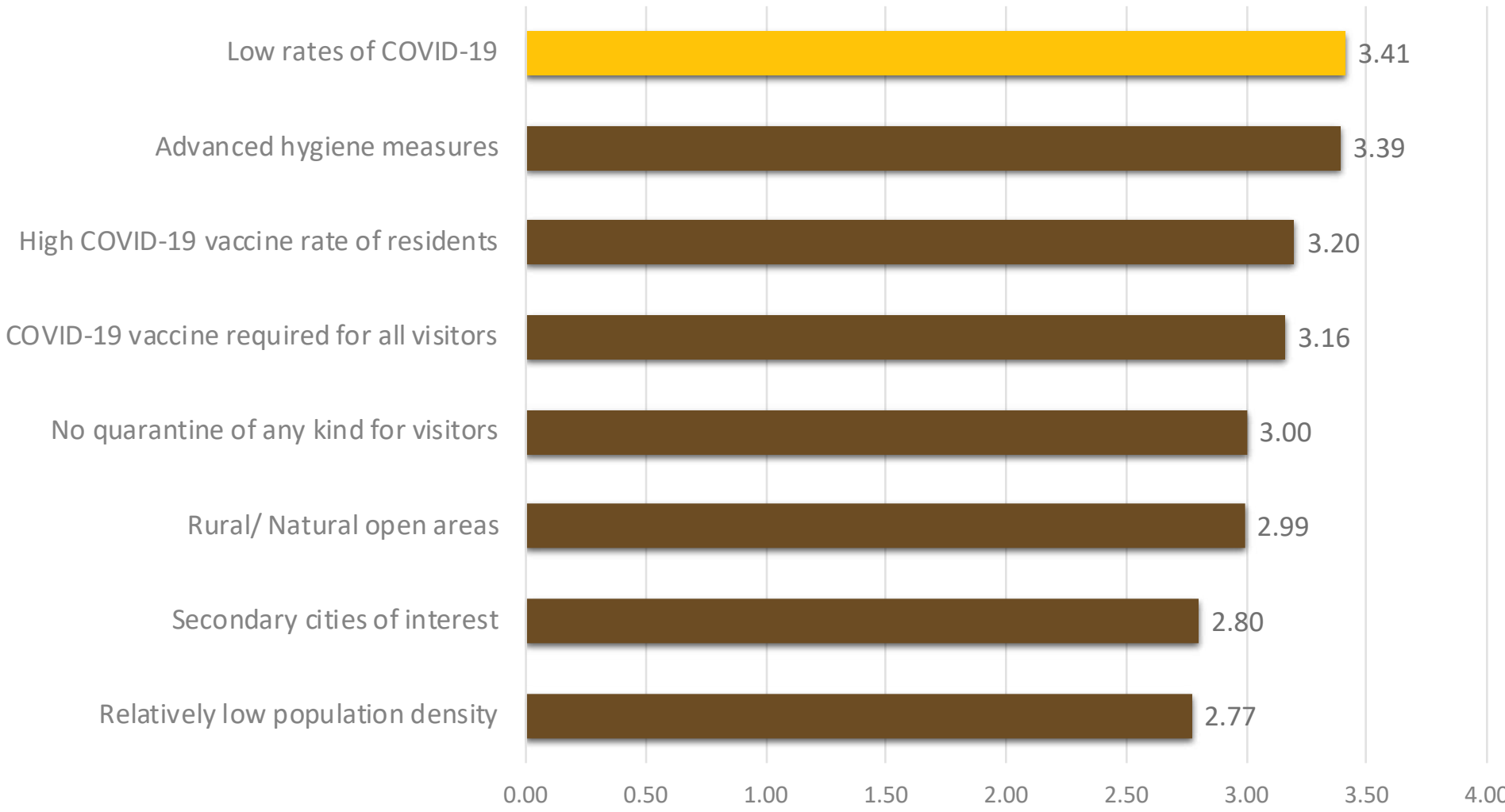
POST-COVID TRAVEL

Japanese travelers are becoming more open to the idea of traveling internationally.



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – MEAN SCORE



Importance of **“Low rates of COVID-19”** has **decreased** in importance, from 3.67 mean in Sept. 2021.

Importance of **“Advanced hygiene measures”** has **decreased** in importance, from 3.55 mean in Sept. 2021.

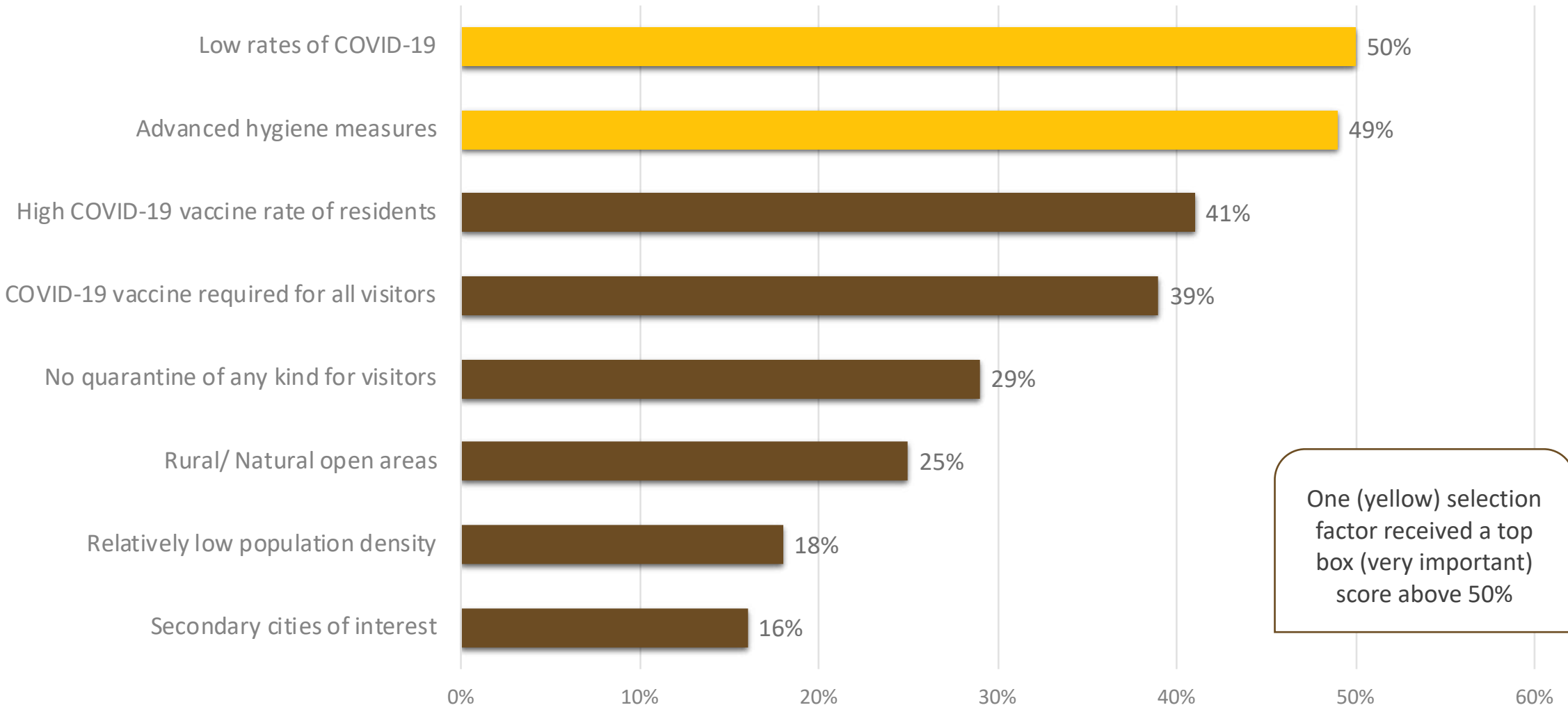
Importance of **“No quarantine of any kind for visitors”** has **increased** from 2.61 in Sept. 2021.

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



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – TOP BOX (VERY IMPORTANT)

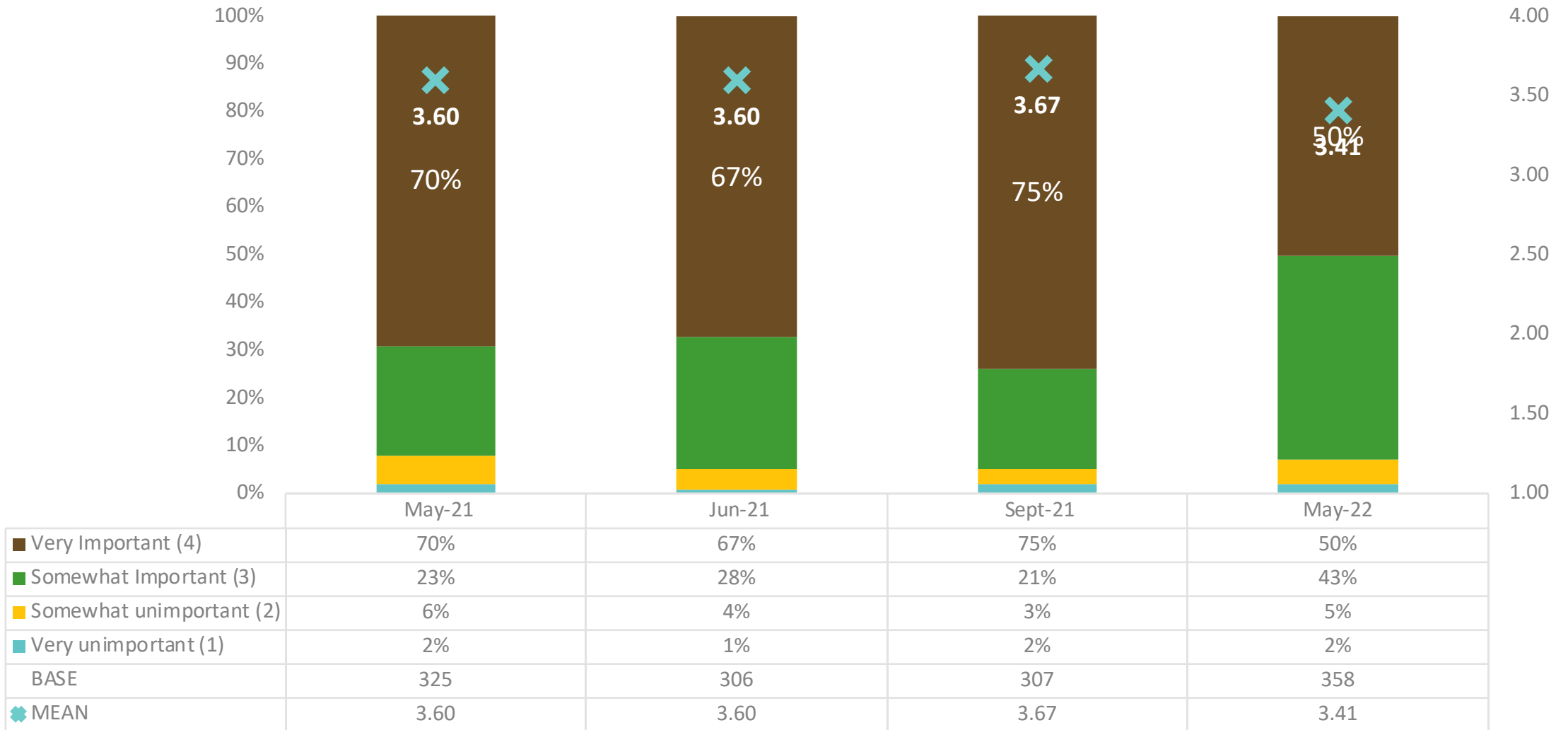


One (yellow) selection factor received a top box (very important) score above 50%



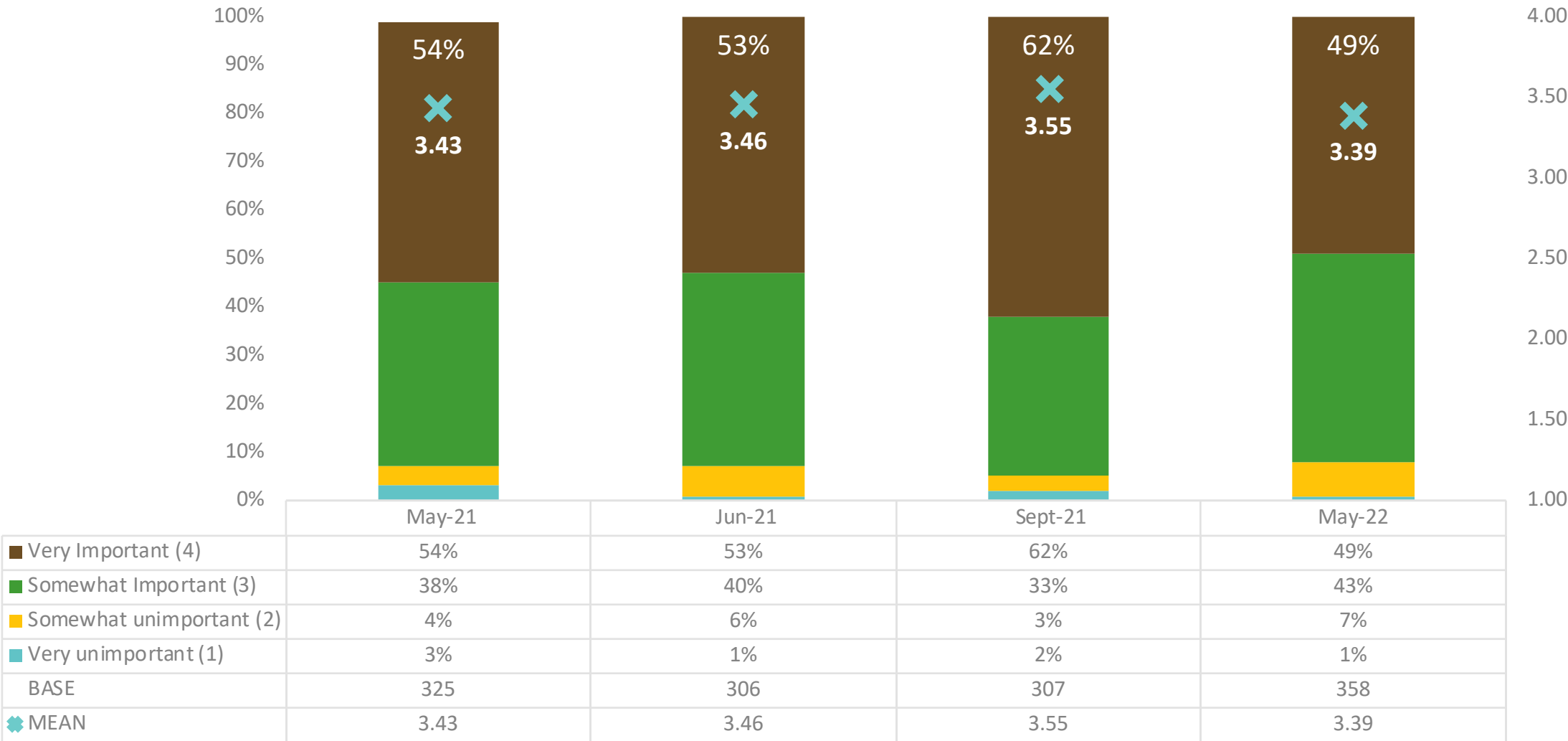
POST-COVID SELECTION FACTOR

Low rates of COVID-19



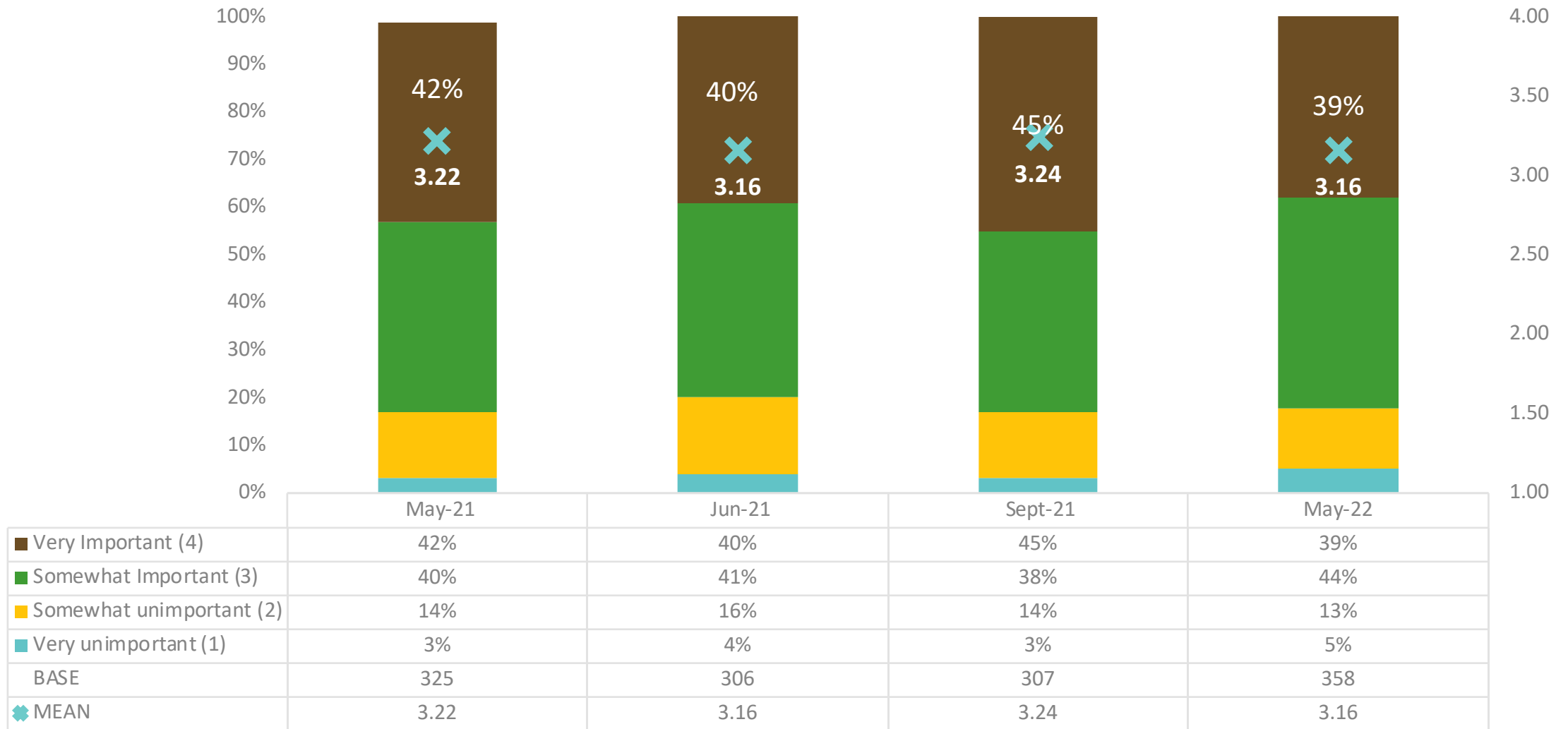
POST-COVID SELECTION FACTOR

Advanced hygiene measures



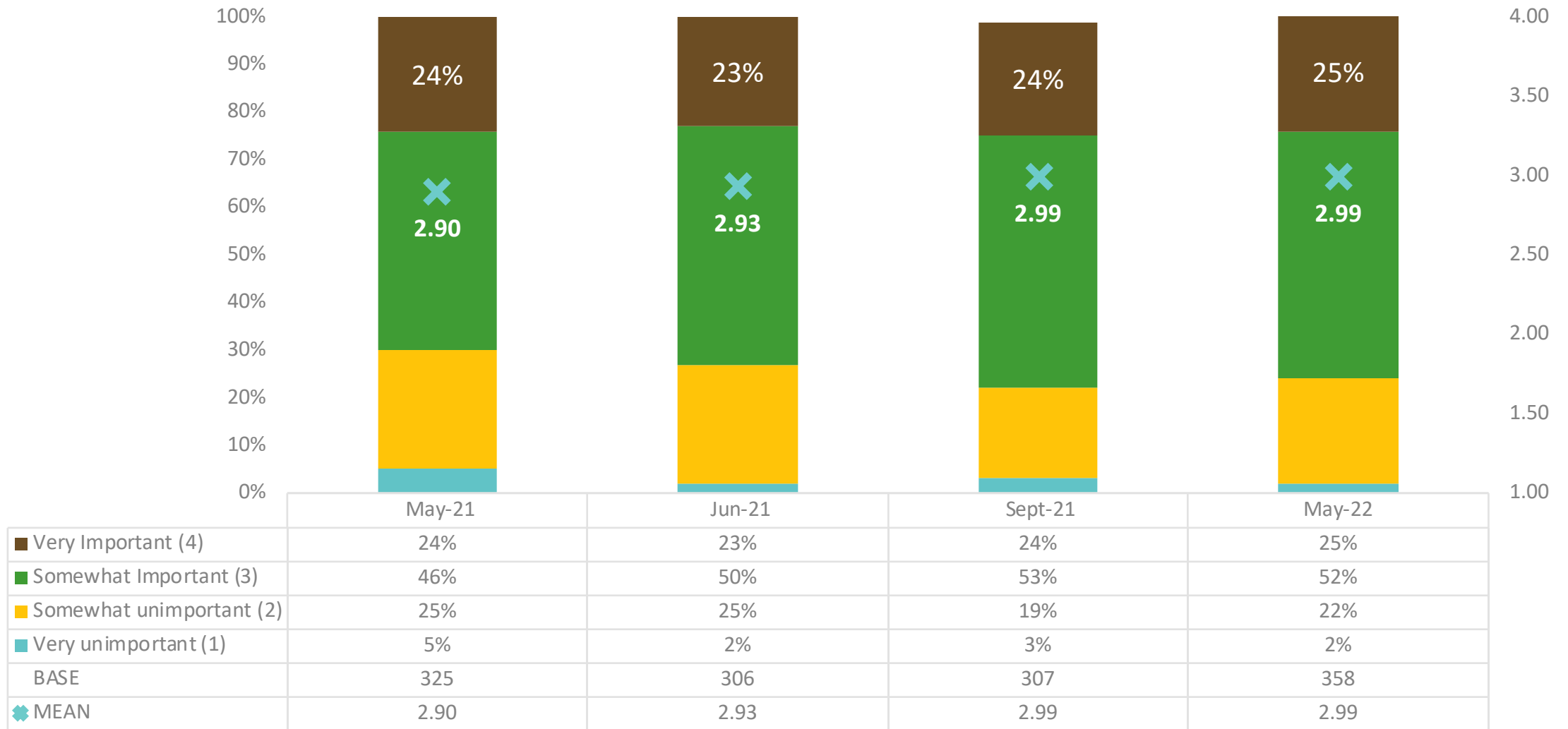
POST-COVID SELECTION FACTOR

COVID-19 vaccine required for all visitors



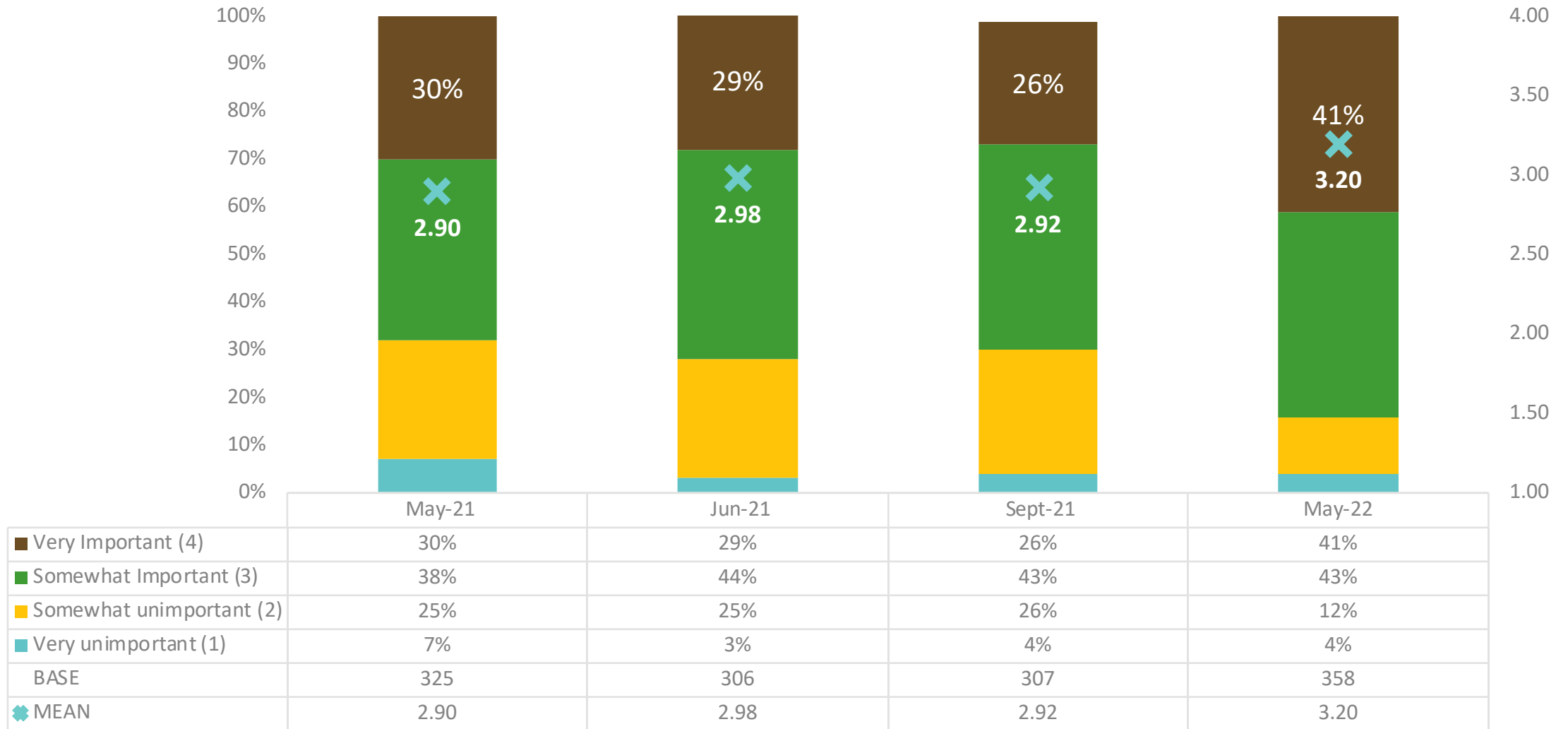
POST-COVID SELECTION FACTOR

Rural/ natural open areas



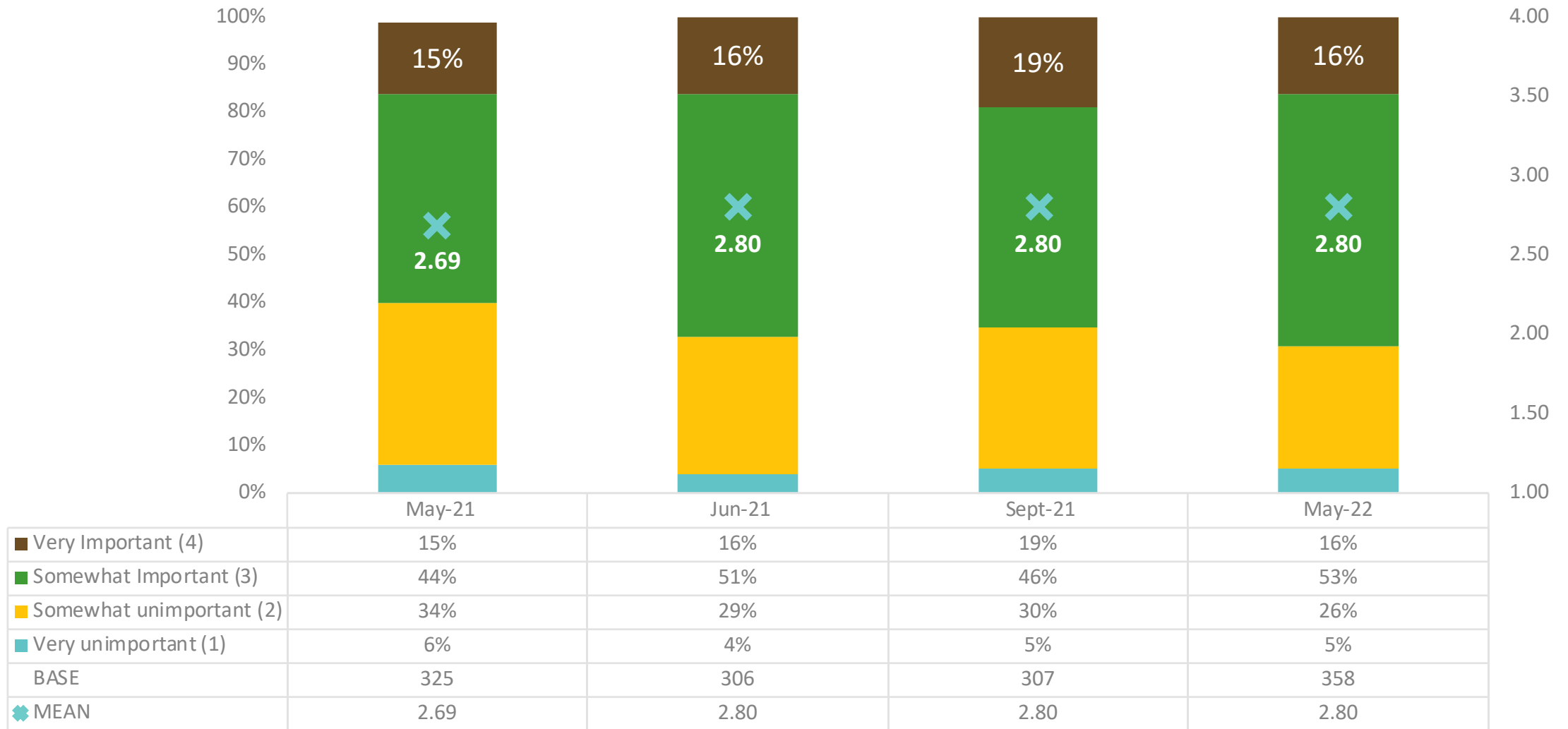
POST-COVID SELECTION FACTOR

High COVID-19 vaccine rate of residents



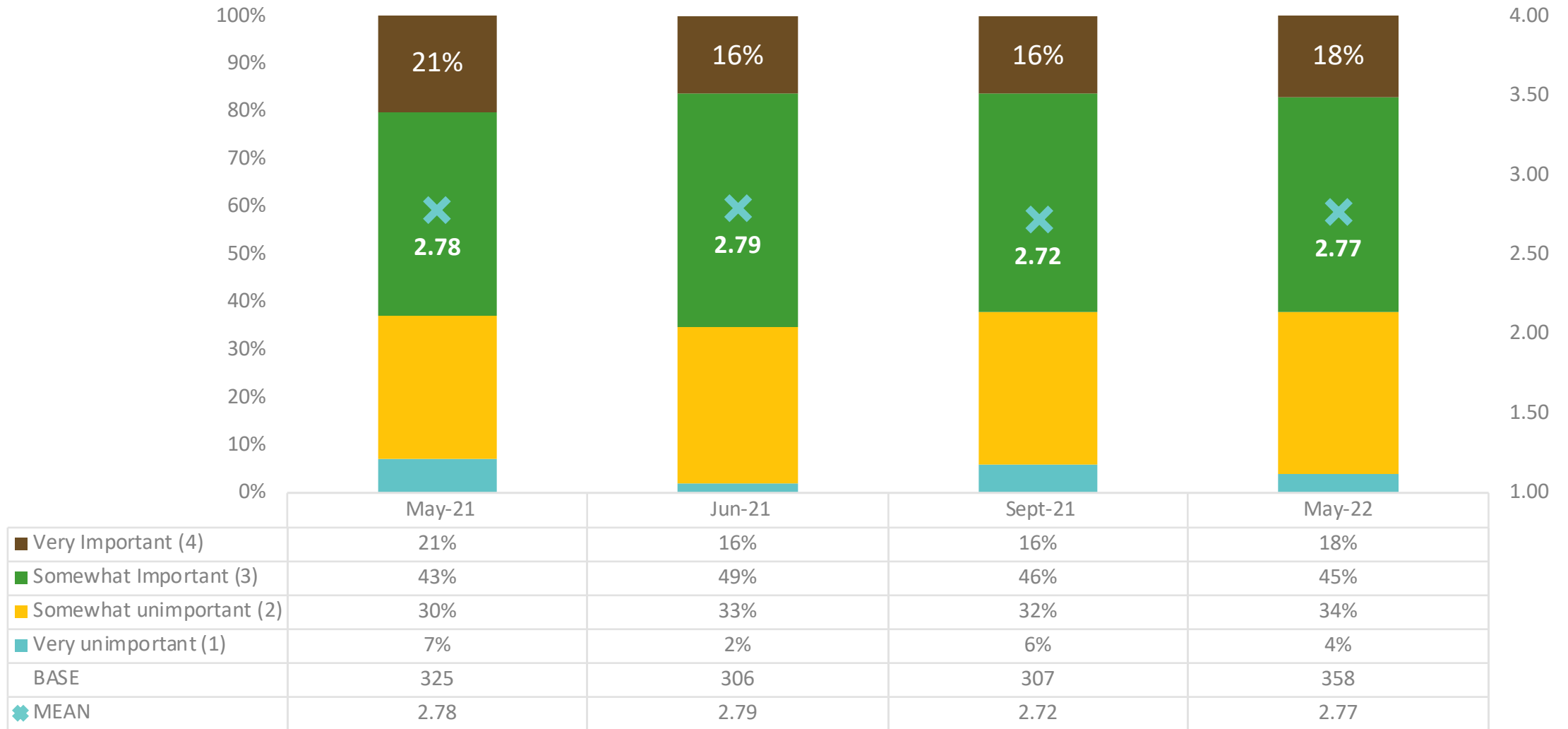
POST-COVID SELECTION FACTOR

Secondary cities of interest



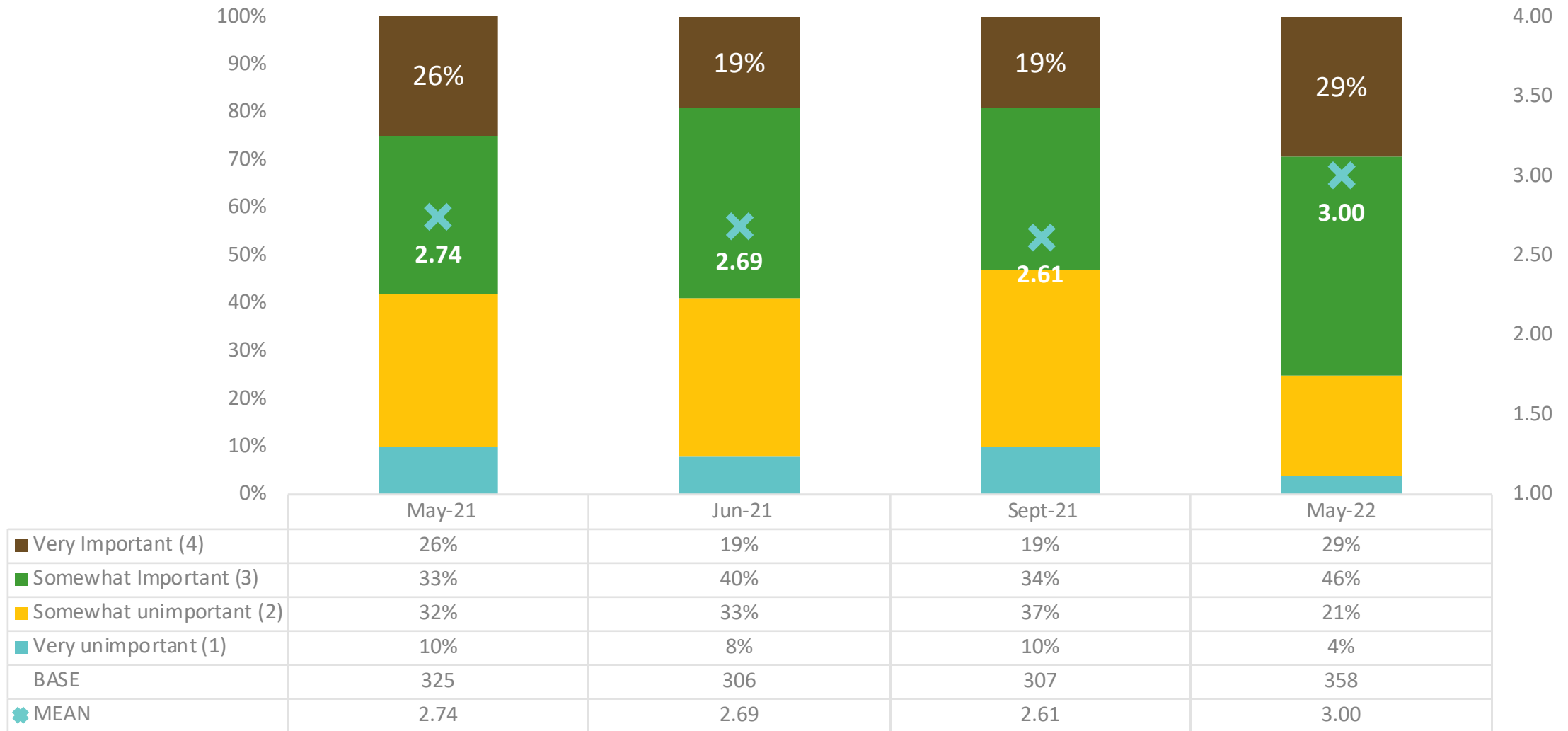
POST-COVID SELECTION FACTOR

Relatively low population density

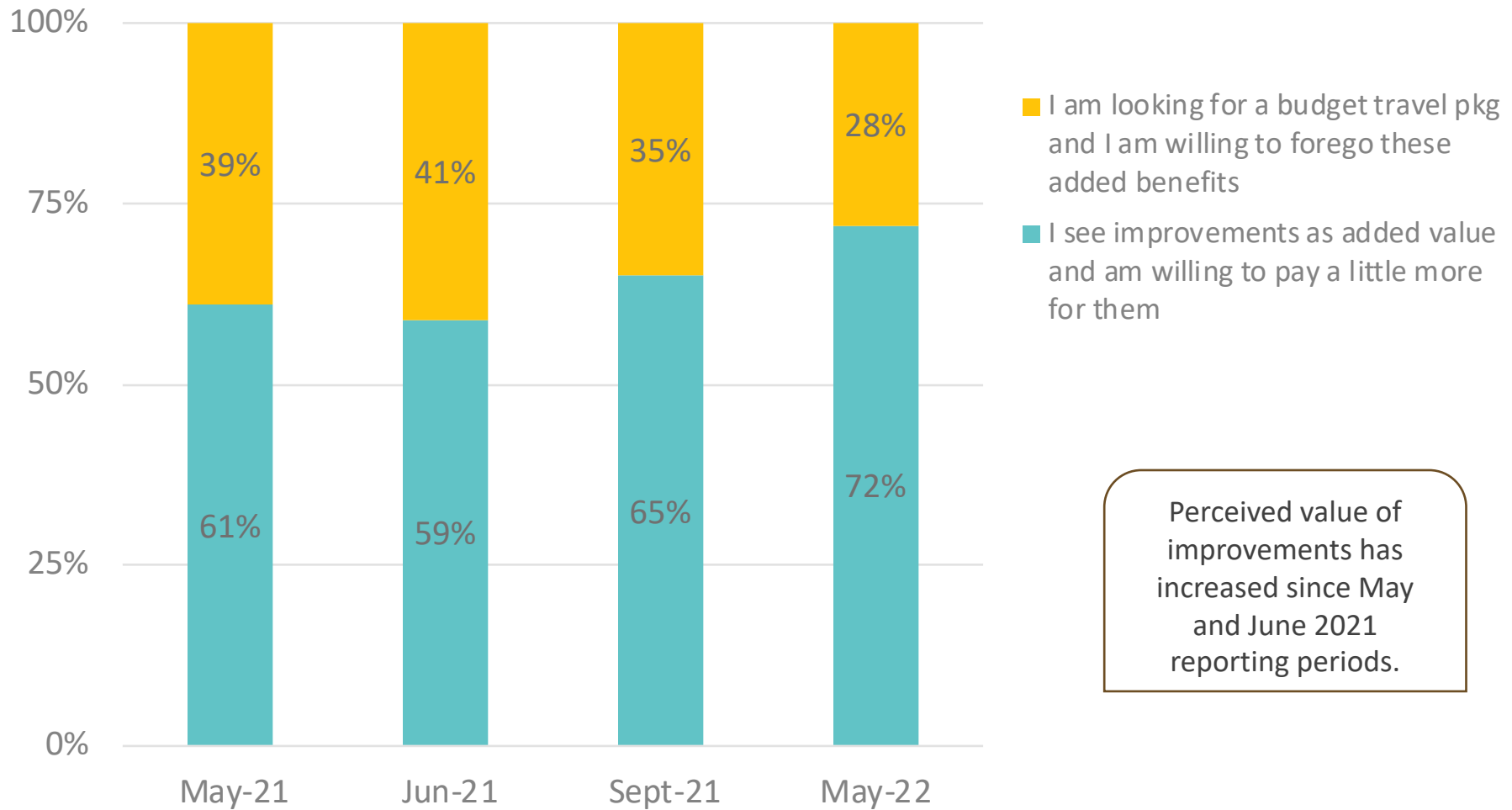


POST-COVID SELECTION FACTOR

No quarantine of any kind for visitors



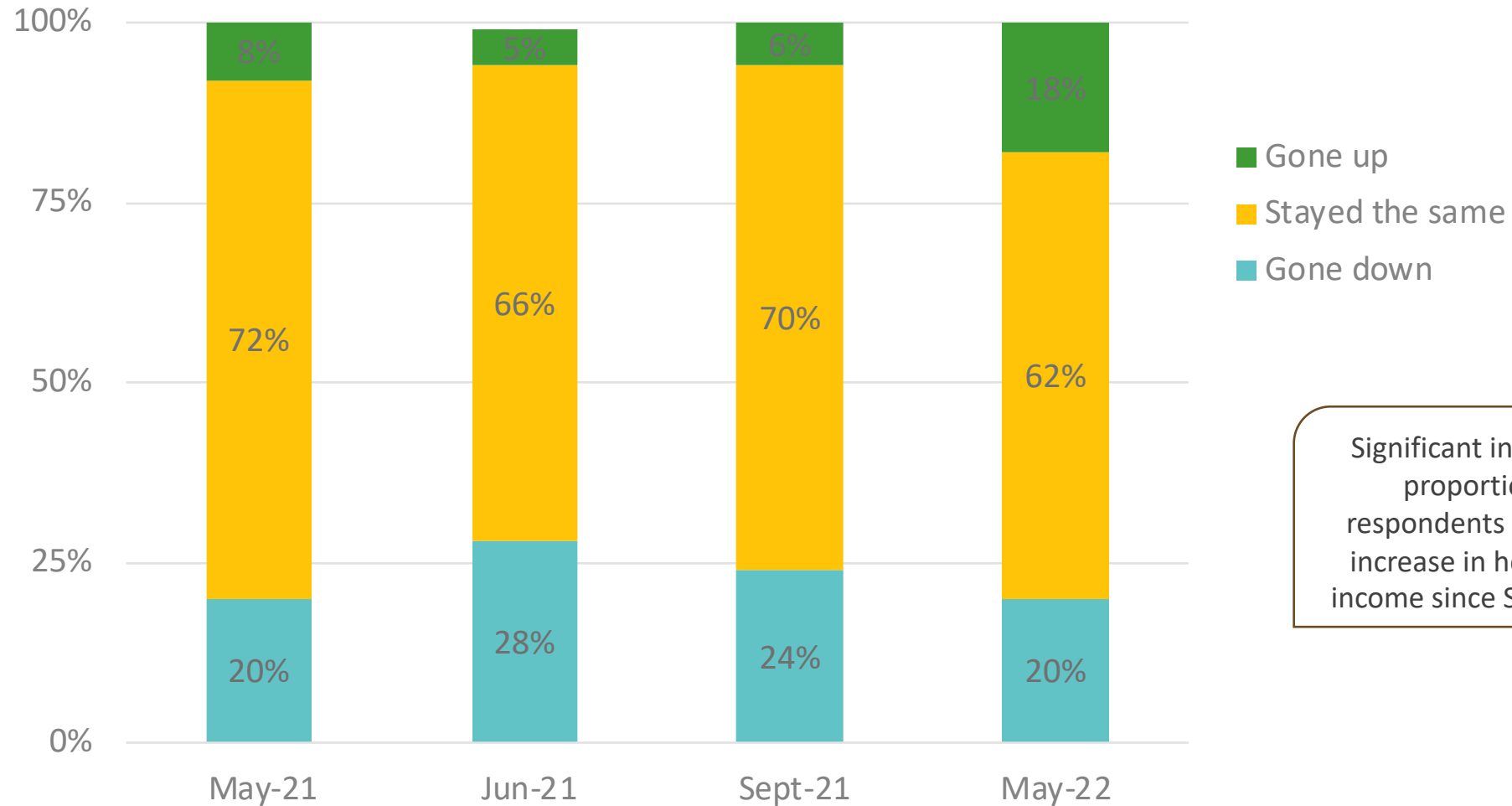
GUAM AIRPORT COVID-19 SAFETY MEASURES



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?



CHANGES IN HOUSEHOLD INCOME DURING PANDEMIC



Significant increase in proportion of respondents reporting increase in household income since Sept. 2021.

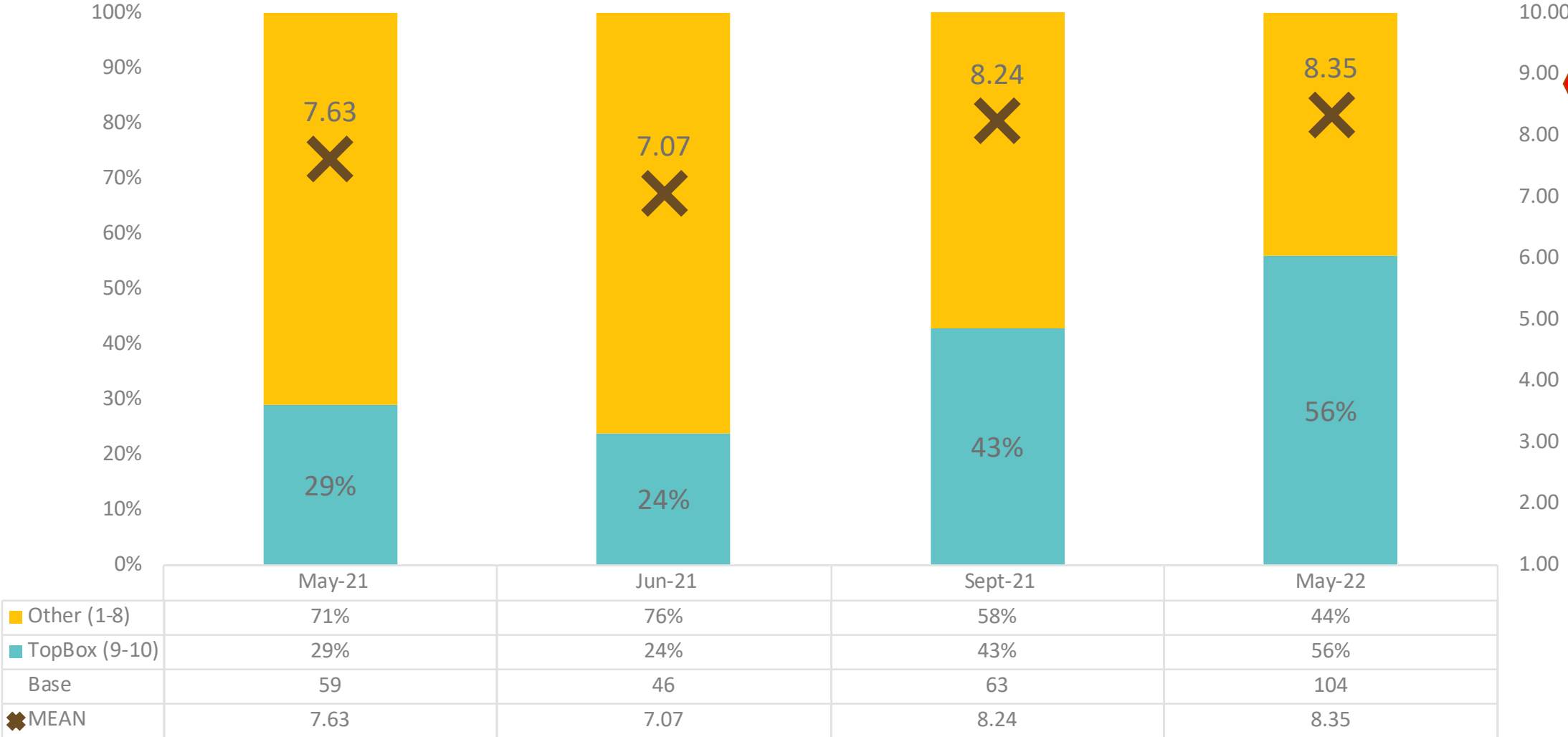


SECTION 3

VISITOR SATISFACTION



OVERALL SATISFACTION – 10PT SCALE



Caution
small
base

PRIMARY TRAVEL MOTIVATION

	May 2021	June 2021	Sept 2021	May 2022
BASE	59	46	63	104
Vacation/ pleasure	76%	78%	73%	77%
Honeymoon	7%	11%	8%	4%
Organized sporting activity/ event	3%	2%	8%	4%
Incentive trip	-	7%	6%	5%
Get married/ attend wedding	7%	-	2%	3%
Business/ conference/ convention/ trade show	3%	2%	2%	4%
Visit friends/ family	3%	-	2%	1%

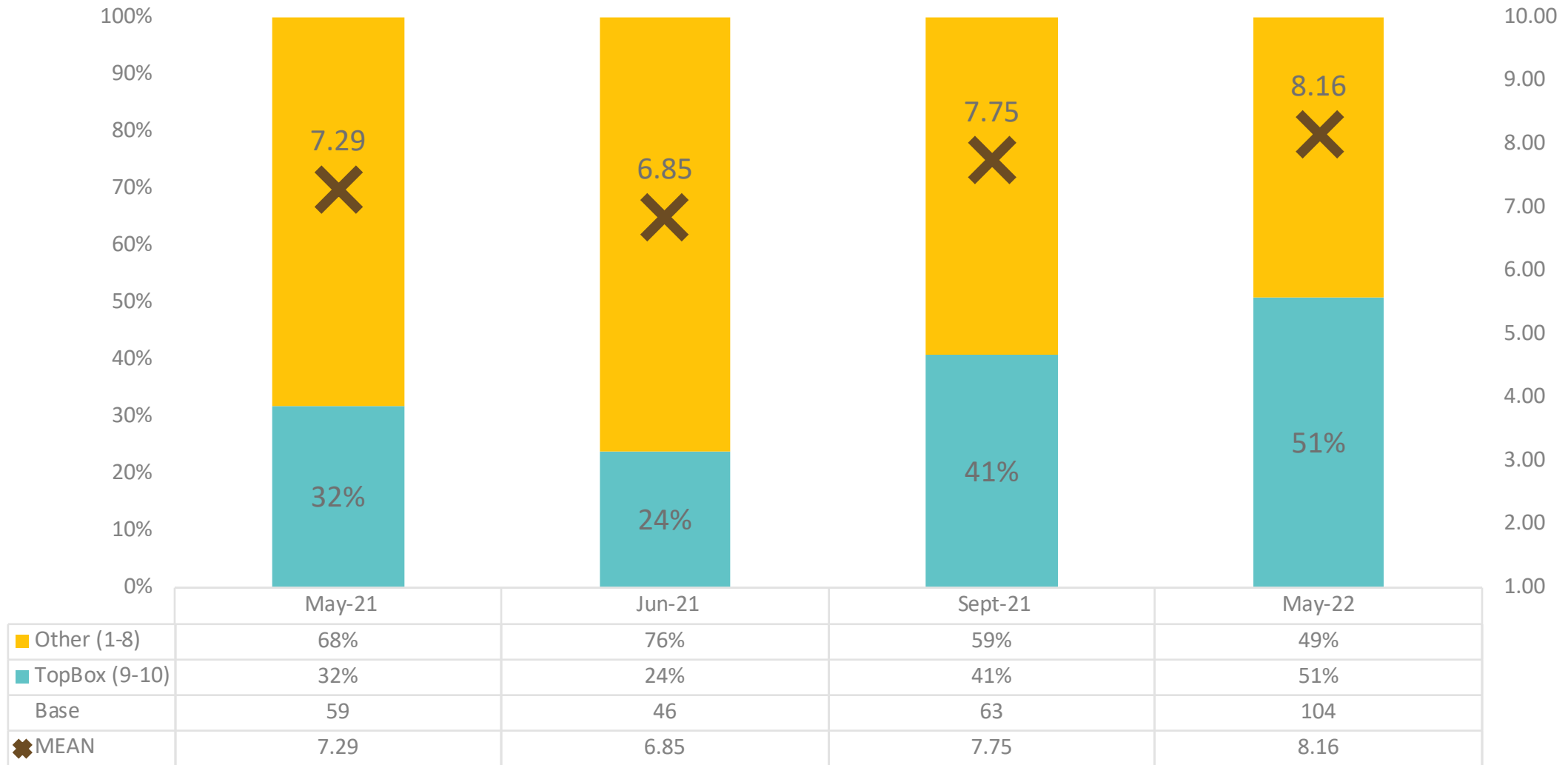


TRAVEL MOTIVATIONS – TOP 3

	May 2021	June 2021	Sept 2021	May 2022
BASE	59	46	53	104
Beautiful seas, beaches, tropical climate	56%	48%	59%	52%
Short travel time	37%	28%	40%	38%
Safety	37%	28%	37%	31%
Prior trip	25%	26%	35%	40%
Sightseeing/ tourist spots	14%	13%	19%	17%
Price	25%	35%	17%	26%
Shopping	14%	13%	14%	16%
Water sports	7%	20%	13%	8%
Relaxation	10%	13%	10%	11%



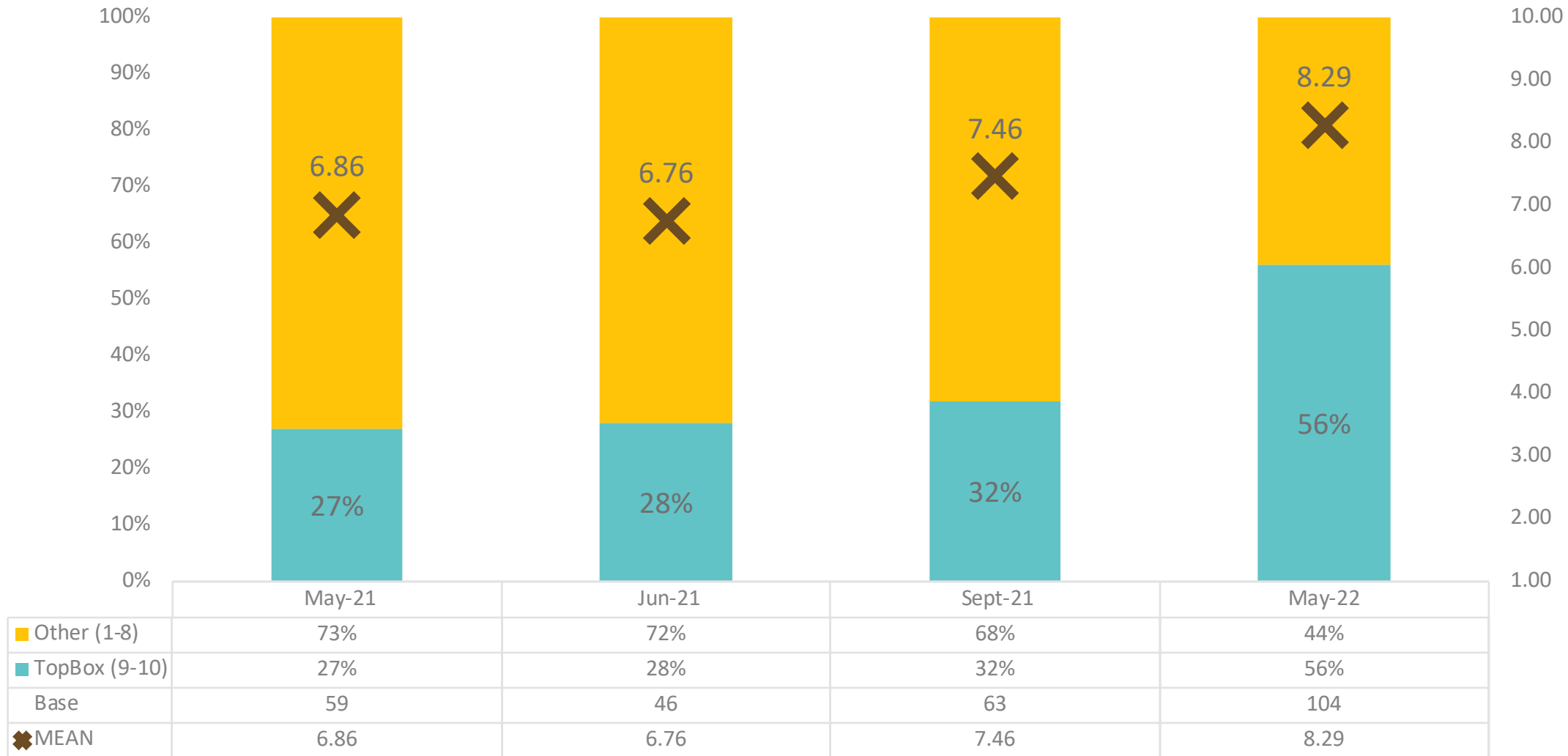
BRAND ADVOCACY – 10PT SCALE



Caution
small
base



BRAND LOYALTY – 10PT SCALE



Caution
small
base

GUAM TRAVELER – TRIP MOTIVATIONS

	May 2021	June 2021	Sept 2021	May 2022
BASE	58	45	63	104
<i>Nature/ natural beauty/ scenery</i>	50%	31%	52%	53%
<i>Beach/ ocean</i>	48%	31%	41%	47%
<i>Safe environment</i>	33%	22%	40%	31%
<i>Weather/ climate/ good atmosphere/ fresh air</i>	34%	31%	37%	38%
<i>Shopping</i>	19%	24%	33%	36%
<i>Sightseeing</i>	28%	31%	33%	40%
<i>Hotel/ accommodations</i>	33%	22%	29%	34%
<i>Local culture/ people/ music</i>	12%	22%	27%	26%
<i>Relaxation</i>	31%	33%	21%	37%
<i>Food – quality/ variety/ service</i>	14%	9%	19%	29%
<i>Overall customer service</i>	17%	13%	19%	24%
<i>Variety of activities</i>	14%	18%	16%	23%
<i>Feeling the Hafa Adai spirit</i>	10%	13%	11%	36%
<i>Military/ historical sites</i>	10%	9%	5%	15%



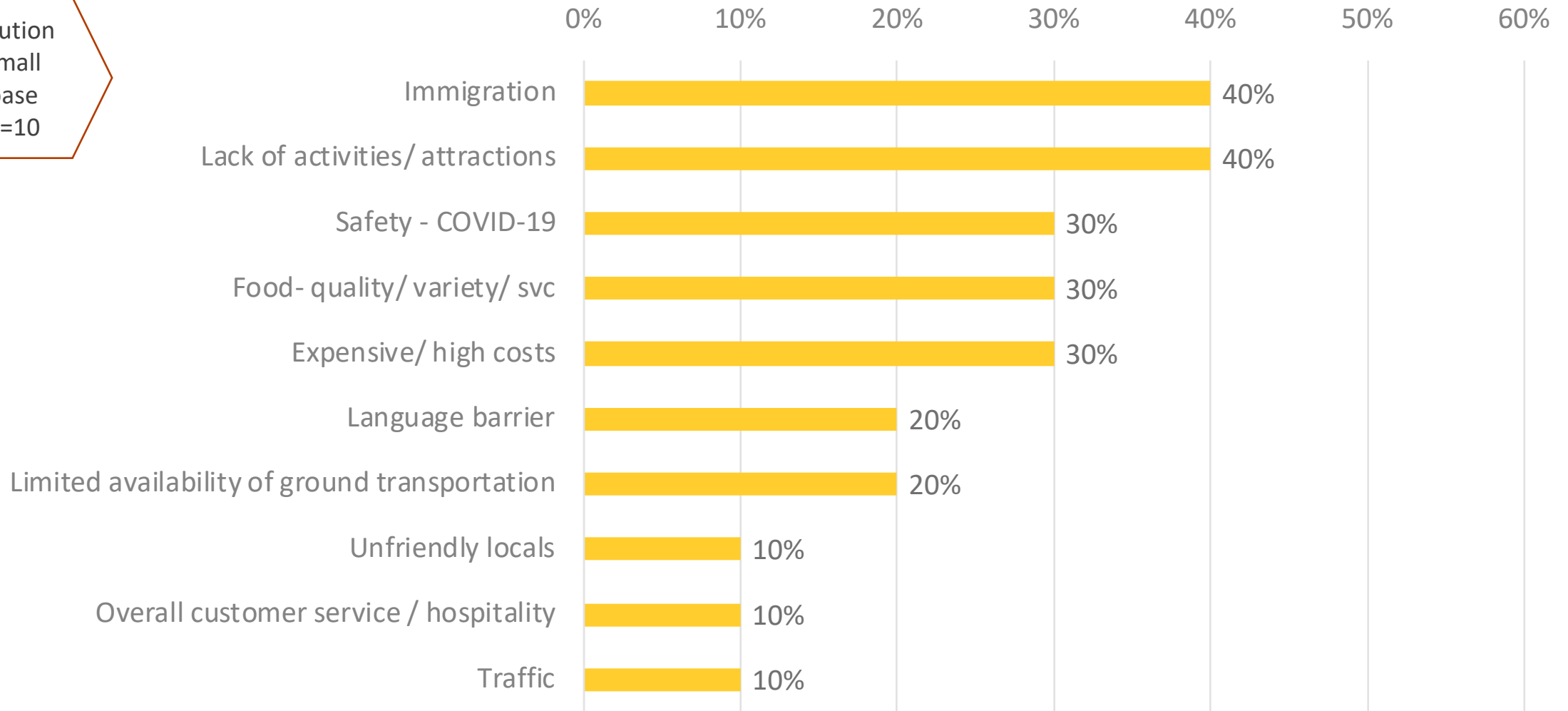
GUAM TRAVELERS – DRAWBACKS

	May 2021	June 2021	Sept 2021	May 2022
BASE	59	46	63	104
<i>No negatives</i>	46%	35%	40%	42%
<i>Ground transportation – limited options</i>	14%	22%	16%	19%
<i>Health/ Safety/ COVID</i>	12%	15%	14%	13%
<i>Language barrier</i>	8%	9%	14%	16%
<i>Expensive</i>	19%	17%	11%	15%
<i>Traffic</i>	10%	7%	11%	14%
<i>Safety</i>	3%	2%	8%	14%
<i>Immigration</i>	5%	15%	6%	13%
<i>Food – quality/ variety/ service</i>	7%	9%	5%	13%
<i>Lack of activities/ attractions</i>	2%	4%	5%	14%
<i>Customer service</i>	3%	9%	2%	12%
<i>Unfriendly locals</i>	2%	2%	2%	11%

Caution
small
base

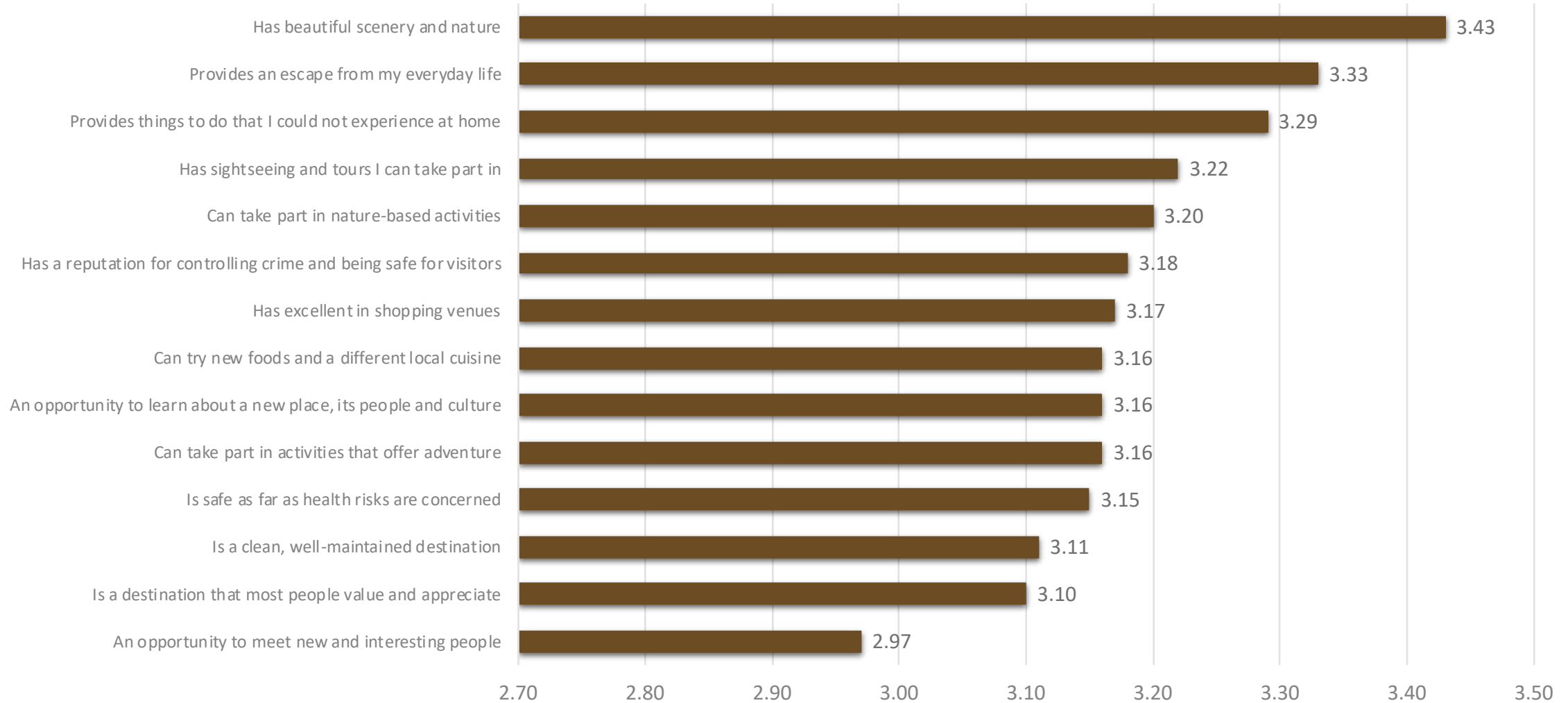
UNLIKELY TO RETURN – REASONS

Caution
small
base
n=10

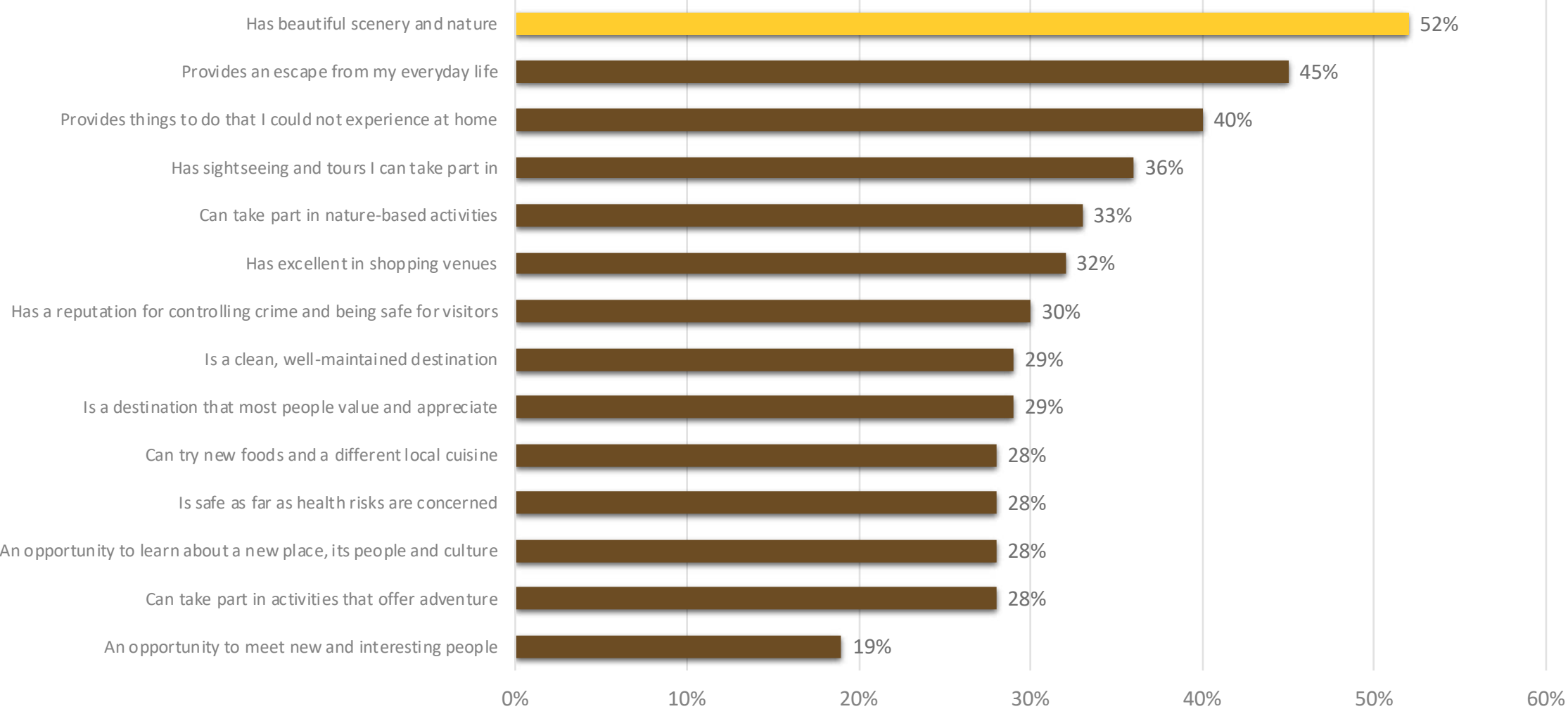


SELECTION FACTORS – SATISFACTION

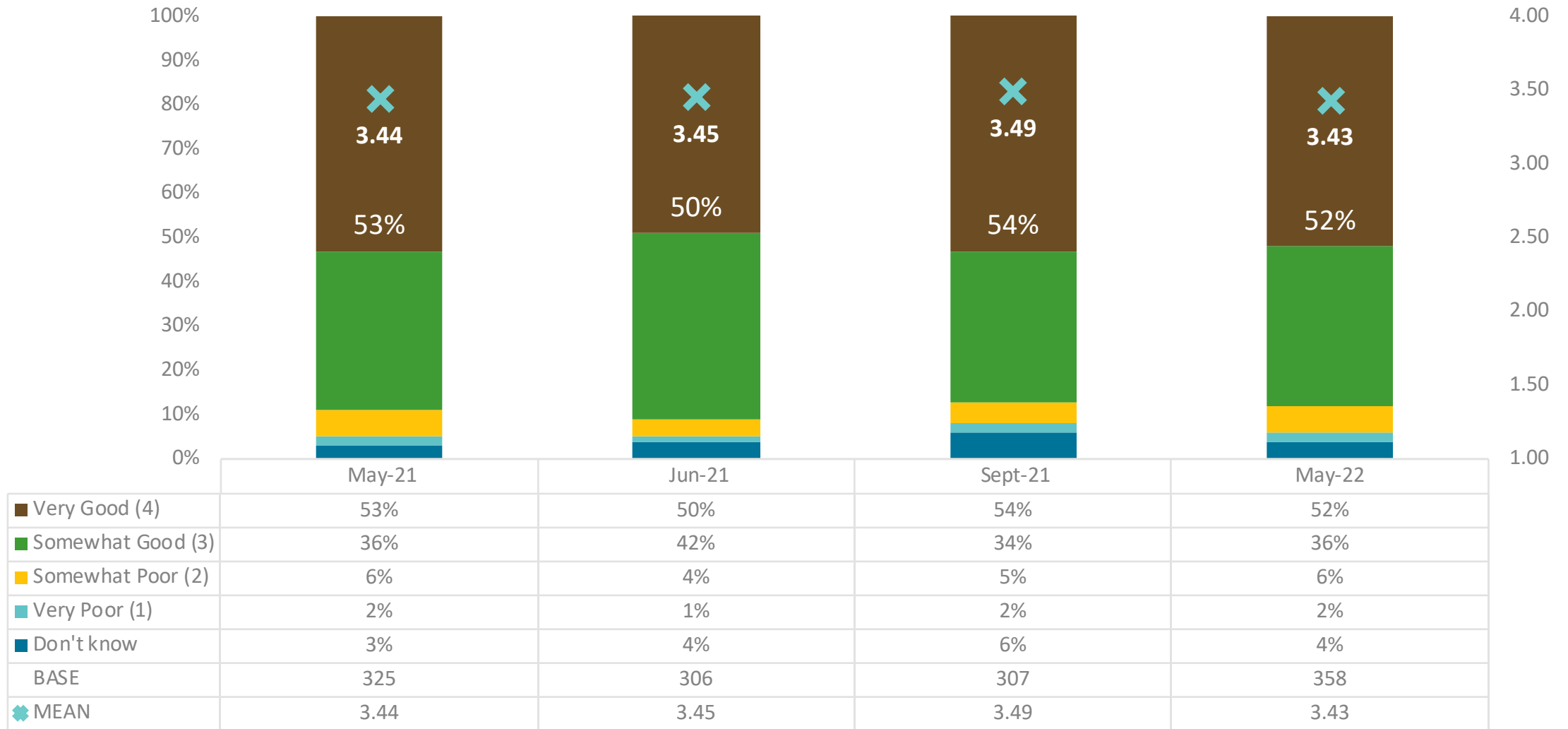
MEAN SCORES 4PT SCALE



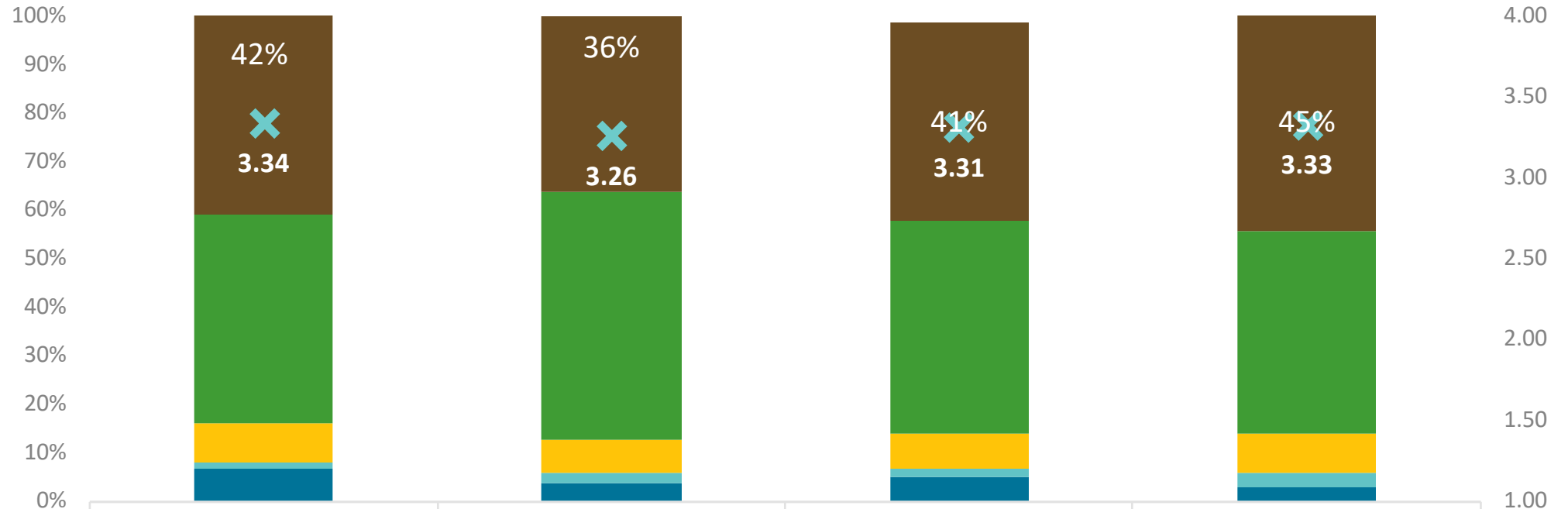
SELECTION FACTORS – SATISFACTION TOP BOX (VERY GOOD)



Has beautiful scenery and nature

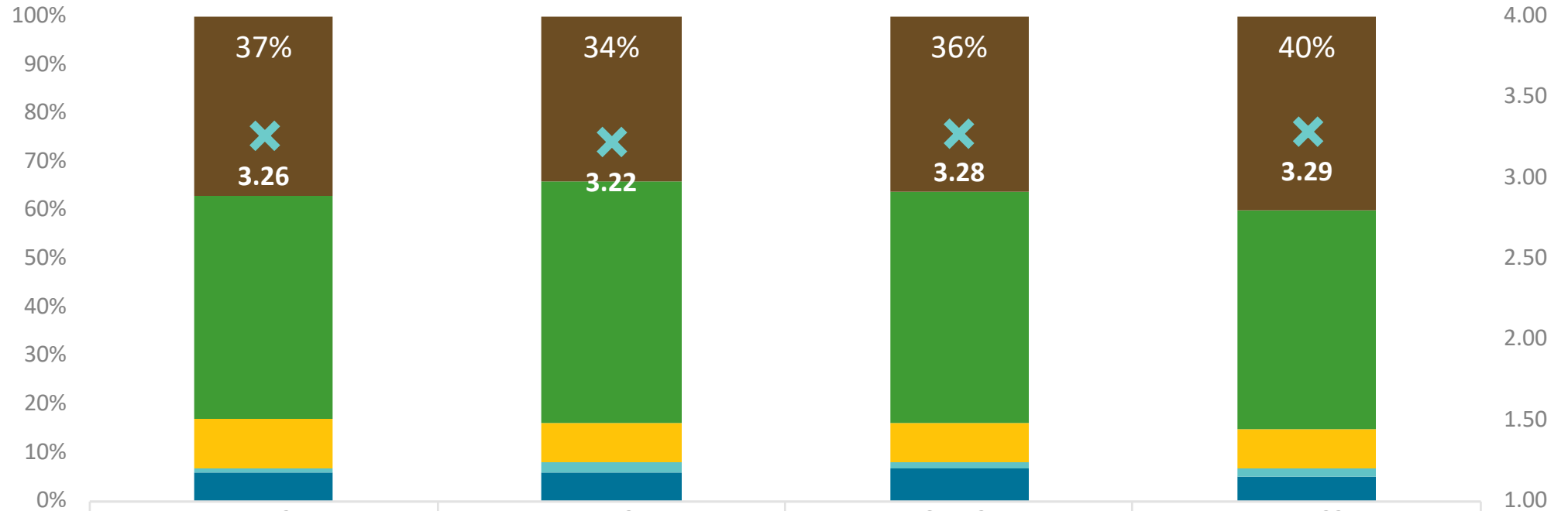


Provides an escape from my everyday life



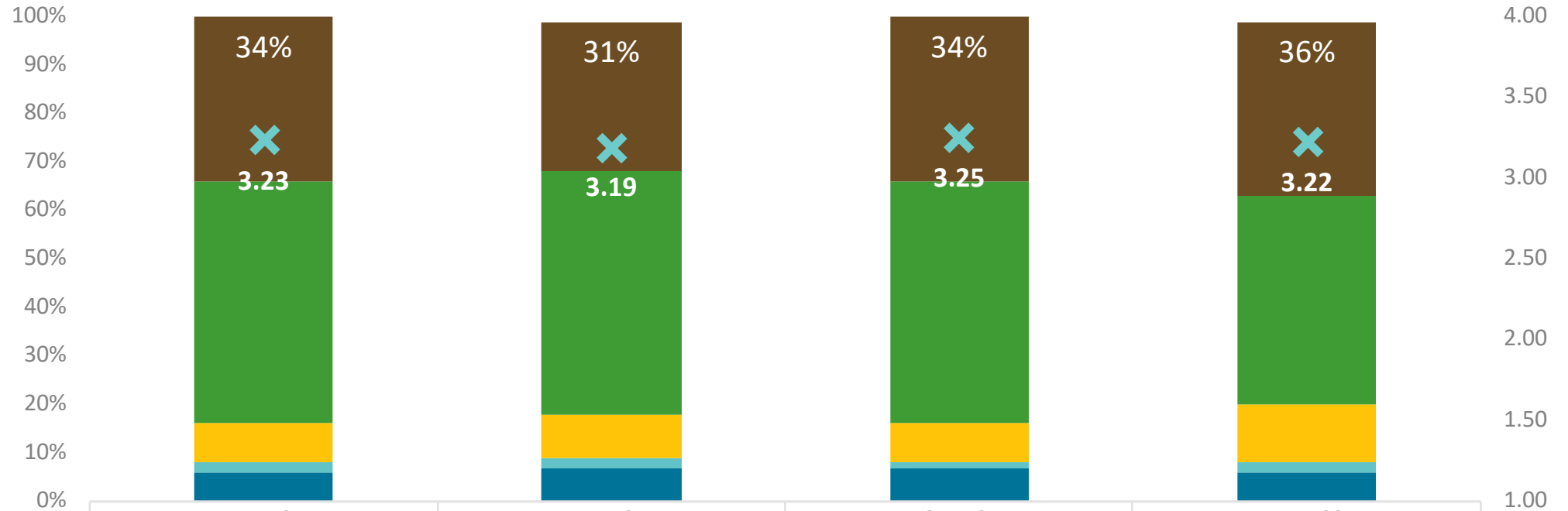
	May-21	Jun-21	Sept-21	May-22
Very Good (4)	42%	36%	41%	45%
Somewhat Good (3)	43%	51%	44%	42%
Somewhat Poor (2)	8%	7%	7%	8%
Very Poor (1)	1%	2%	2%	3%
Don't know	7%	4%	5%	3%
BASE	325	306	307	358
MEAN	3.34	3.26	3.31	3.33

Provides things to do that I could not experience at home



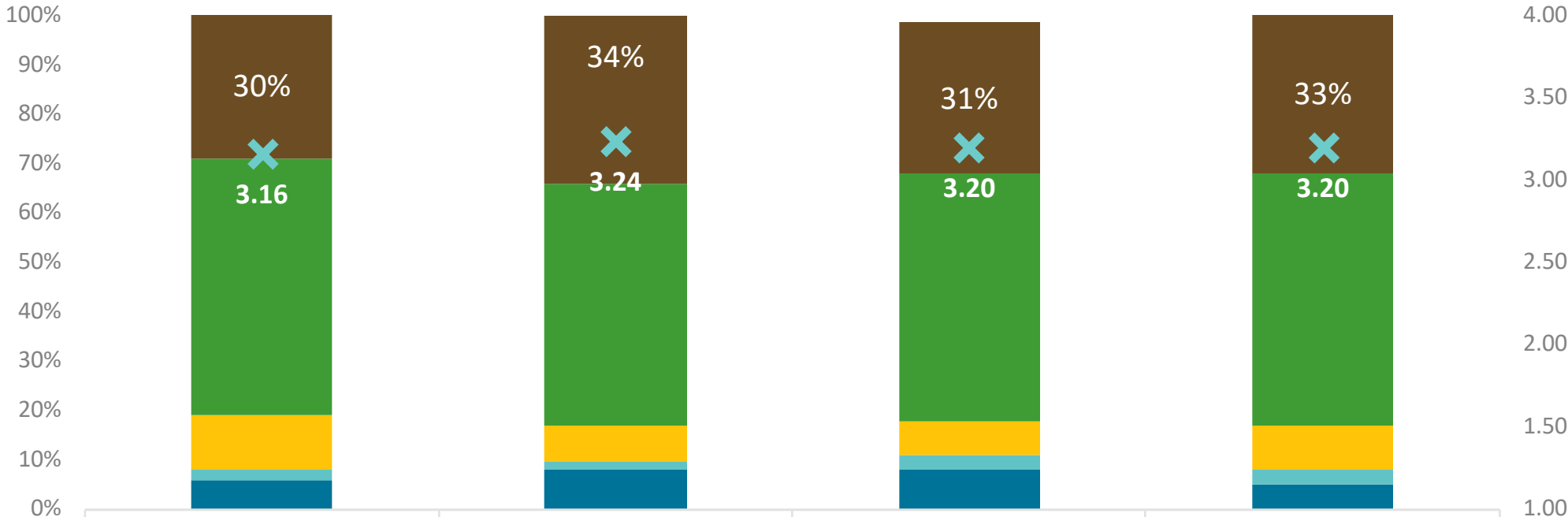
	May-21	Jun-21	Sept-21	May-22
Very Good (4)	37%	34%	36%	40%
Somewhat Good (3)	46%	50%	48%	45%
Somewhat Poor (2)	10%	8%	8%	8%
Very Poor (1)	1%	2%	1%	2%
Don't know	6%	6%	7%	5%
BASE	325	306	307	358
MEAN	3.26	3.22	3.28	3.29

Has sightseeing and tours I can take part in



	May-21	Jun-21	Sept-21	May-22
Very Good (4)	34%	31%	34%	36%
Somewhat Good (3)	50%	50%	50%	43%
Somewhat Poor (2)	8%	9%	8%	12%
Very Poor (1)	2%	2%	1%	2%
Don't know	6%	7%	7%	6%
BASE	325	306	307	358
MEAN	3.23	3.19	3.25	3.22

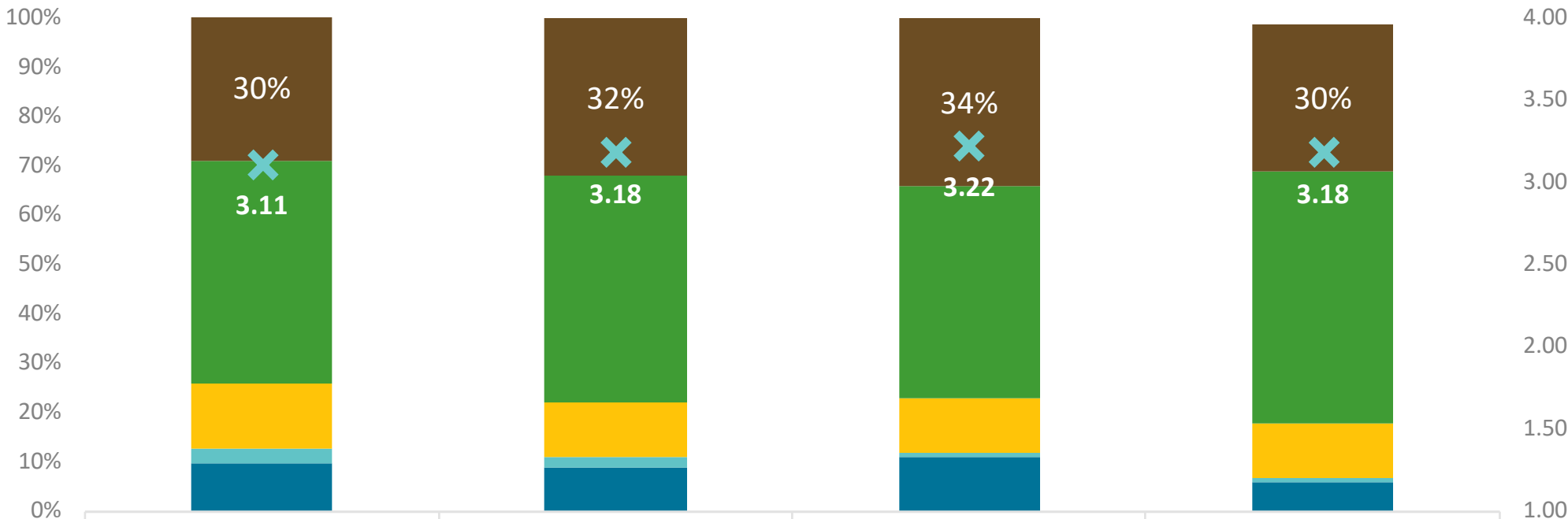
Can take part in nature-based activities



	May-21	Jun-21	Sept-21	May-22
Very Good (4)	30%	34%	31%	33%
Somewhat Good (3)	52%	49%	50%	51%
Somewhat Poor (2)	11%	7%	7%	9%
Very Poor (1)	2%	2%	3%	3%
Don't know	6%	8%	8%	5%
BASE	325	306	307	358
MEAN	3.16	3.24	3.20	3.20



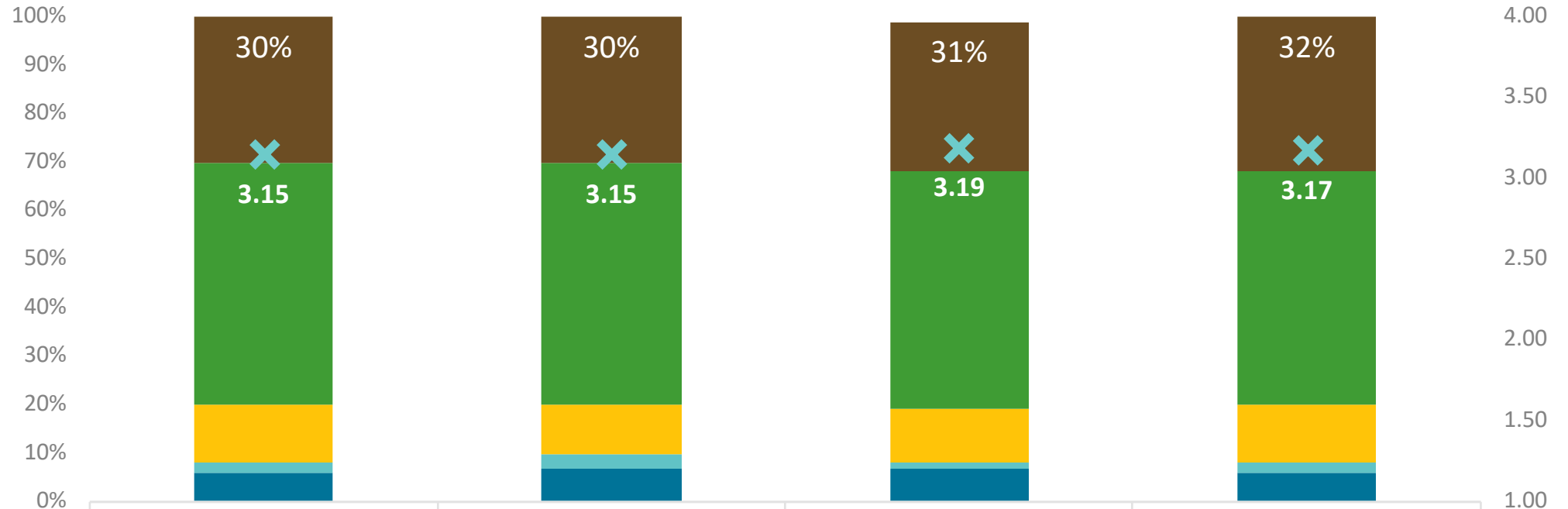
Has a reputation for controlling crime and being safe for visitors



	May-21	Jun-21	Sept-21	May-22
Very Good (4)	30%	32%	34%	30%
Somewhat Good (3)	45%	46%	43%	51%
Somewhat Poor (2)	13%	11%	11%	11%
Very Poor (1)	3%	2%	1%	1%
Don't know	10%	9%	11%	6%
BASE	325	306	307	358
MEAN	3.11	3.18	3.22	3.18

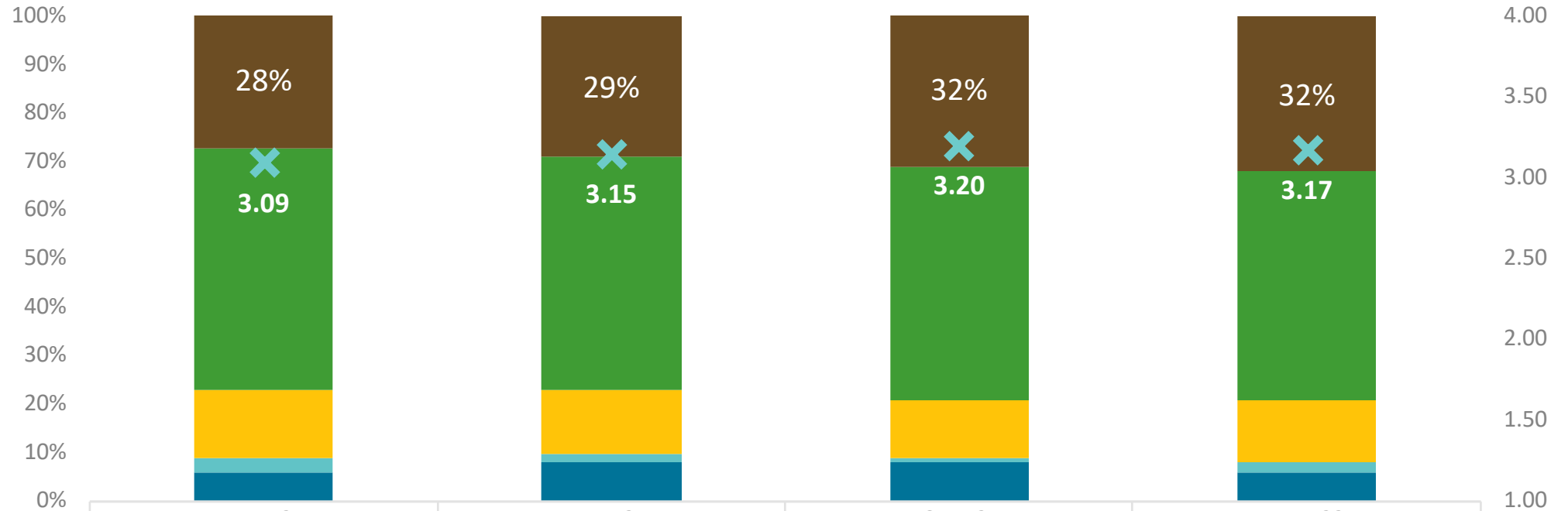


Has excellent shopping in venues



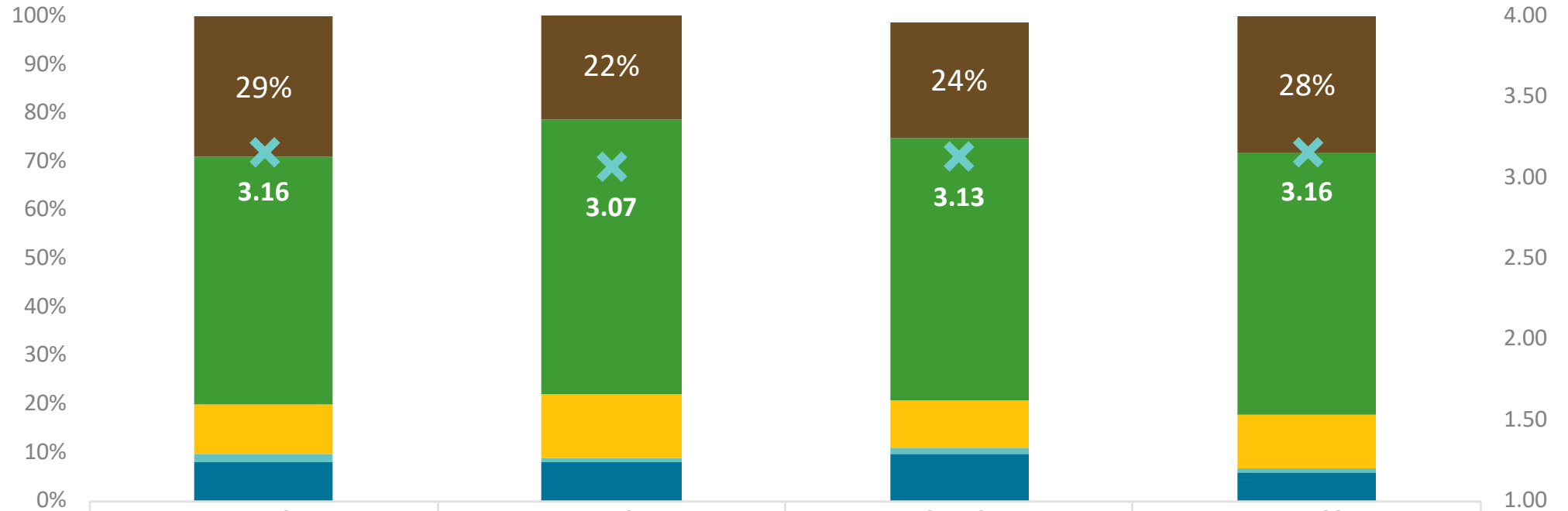
	May-21	Jun-21	Sept-21	May-22
Very Good (4)	30%	30%	31%	32%
Somewhat Good (3)	50%	50%	49%	48%
Somewhat Poor (2)	12%	10%	11%	12%
Very Poor (1)	2%	3%	1%	2%
Don't know	6%	7%	7%	6%
BASE	325	306	307	358
MEAN	3.15	3.15	3.19	3.17

Can try new foods and a different local cuisine



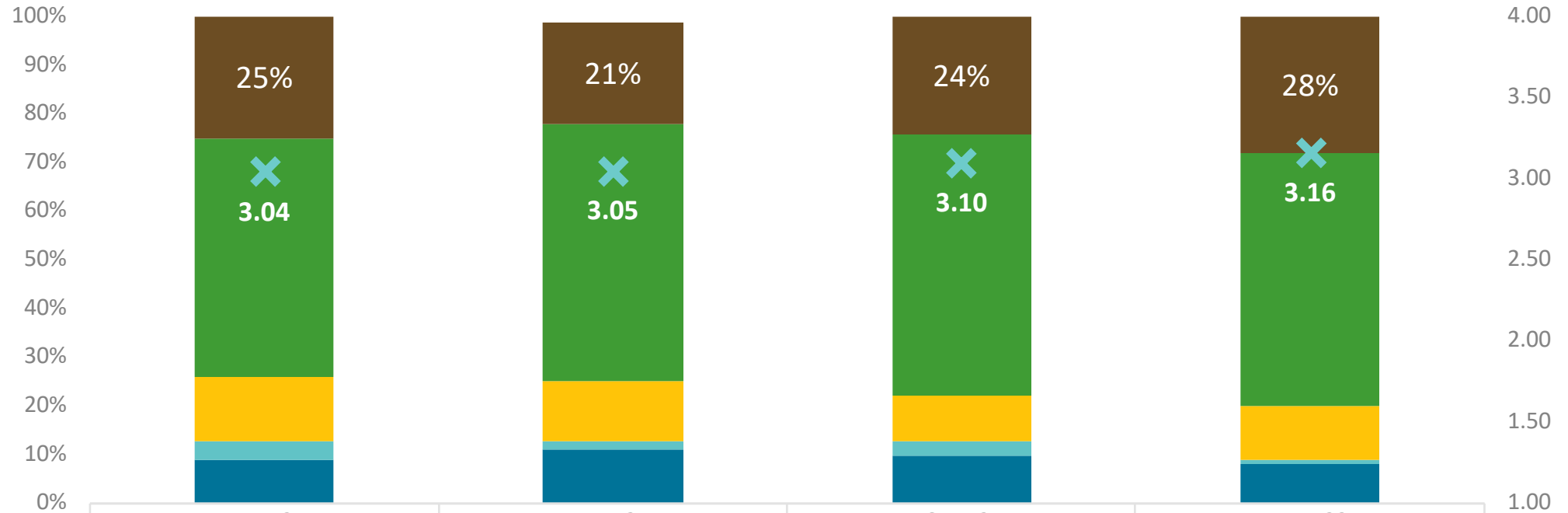
	May-21	Jun-21	Sept-21	May-22
Very Good (4)	28%	29%	32%	32%
Somewhat Good (3)	50%	48%	48%	47%
Somewhat Poor (2)	14%	13%	12%	13%
Very Poor (1)	3%	2%	1%	2%
Don't know	6%	8%	8%	6%
BASE	325	306	307	358
MEAN	3.09	3.15	3.20	3.17

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



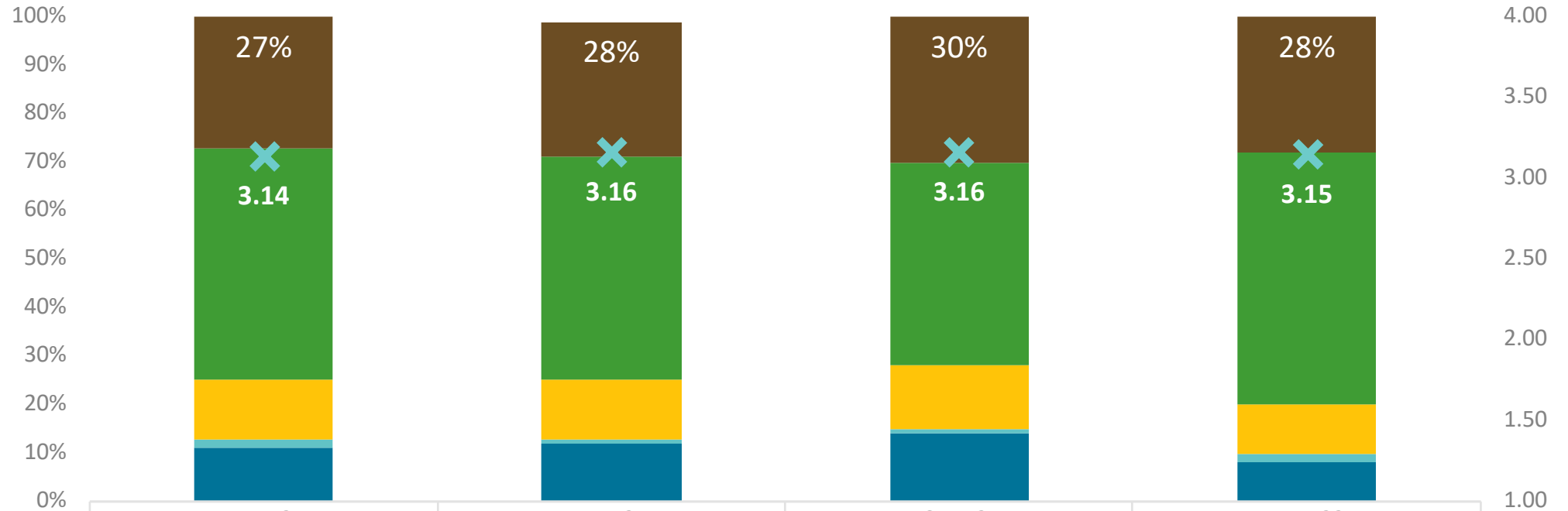
	May-21	Jun-21	Sept-21	May-22
Very Good (4)	29%	22%	24%	28%
Somewhat Good (3)	51%	57%	54%	54%
Somewhat Poor (2)	10%	13%	10%	11%
Very Poor (1)	2%	1%	1%	1%
Don't know	8%	8%	10%	6%
BASE	325	306	307	358
MEAN	3.16	3.07	3.13	3.16

Can take part in activities that offer adventure



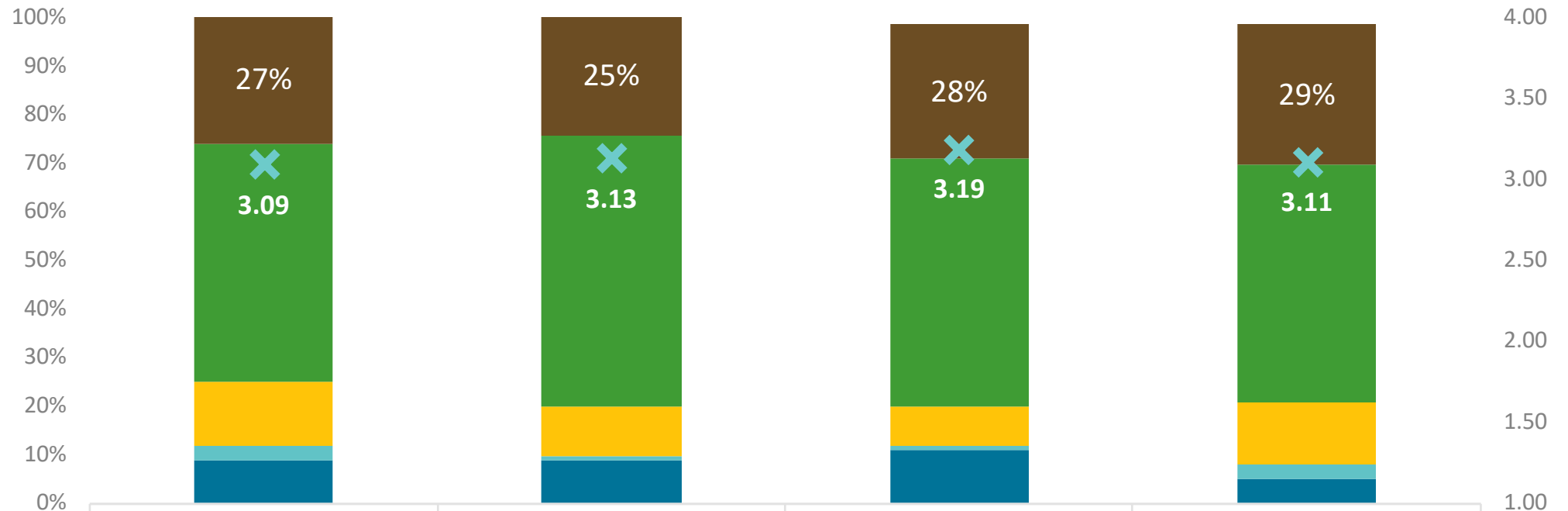
	May-21	Jun-21	Sept-21	May-22
Very Good (4)	25%	21%	24%	28%
Somewhat Good (3)	49%	53%	54%	52%
Somewhat Poor (2)	13%	12%	9%	11%
Very Poor (1)	4%	2%	3%	1%
Don't know	9%	11%	10%	8%
BASE	325	306	307	358
MEAN	3.04	3.05	3.10	3.16

Is safe as far as health risks are concerned



	May-21	Jun-21	Sept-21	May-22
Very Good (4)	27%	28%	30%	28%
Somewhat Good (3)	48%	46%	42%	52%
Somewhat Poor (2)	12%	12%	13%	10%
Very Poor (1)	2%	1%	1%	2%
Don't know	11%	12%	14%	8%
BASE	325	306	307	358
MEAN	3.14	3.16	3.16	3.15

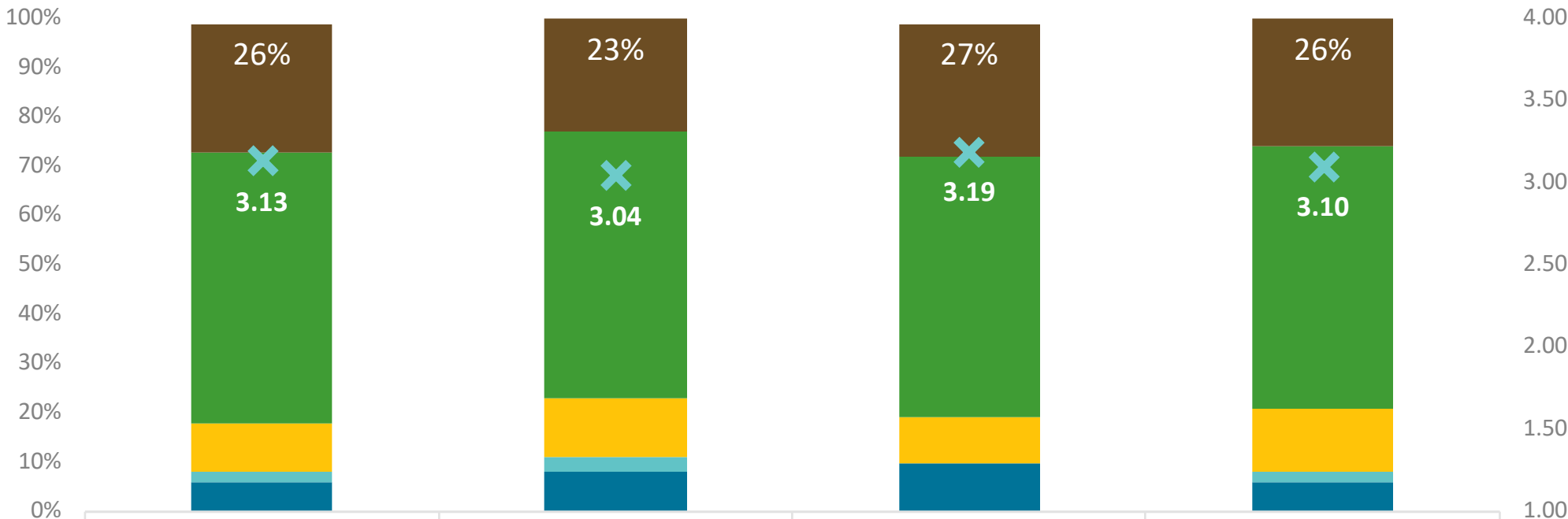
Is a clean, well-maintained destination



	May-21	Jun-21	Sept-21	May-22
Very Good (4)	27%	25%	28%	29%
Somewhat Good (3)	49%	56%	51%	49%
Somewhat Poor (2)	13%	10%	8%	13%
Very Poor (1)	3%	1%	1%	3%
Don't know	9%	9%	11%	5%
BASE	325	306	307	358
MEAN	3.09	3.13	3.19	3.11



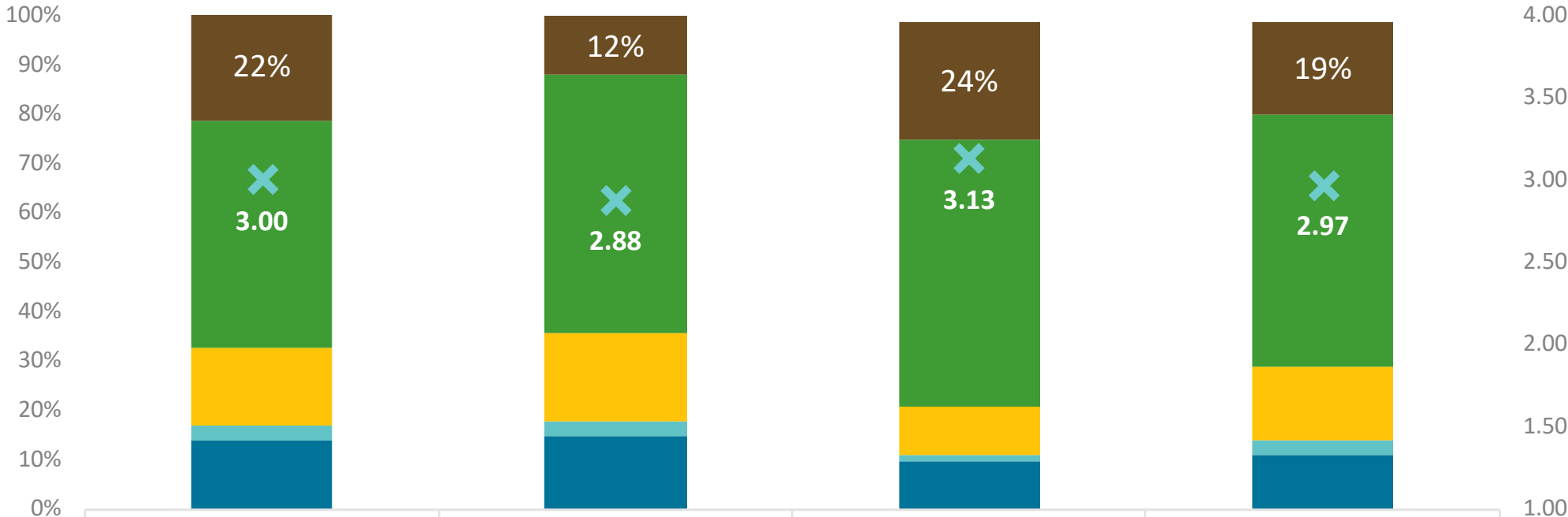
Is a destination that most people value and appreciate



	May-21	Jun-21	Sept-21	May-22
Very Good (4)	26%	23%	27%	26%
Somewhat Good (3)	55%	54%	53%	53%
Somewhat Poor (2)	10%	12%	9%	13%
Very Poor (1)	2%	3%	0%	2%
Don't know	6%	8%	10%	6%
BASE	325	306	307	358
MEAN	3.13	3.04	3.19	3.10



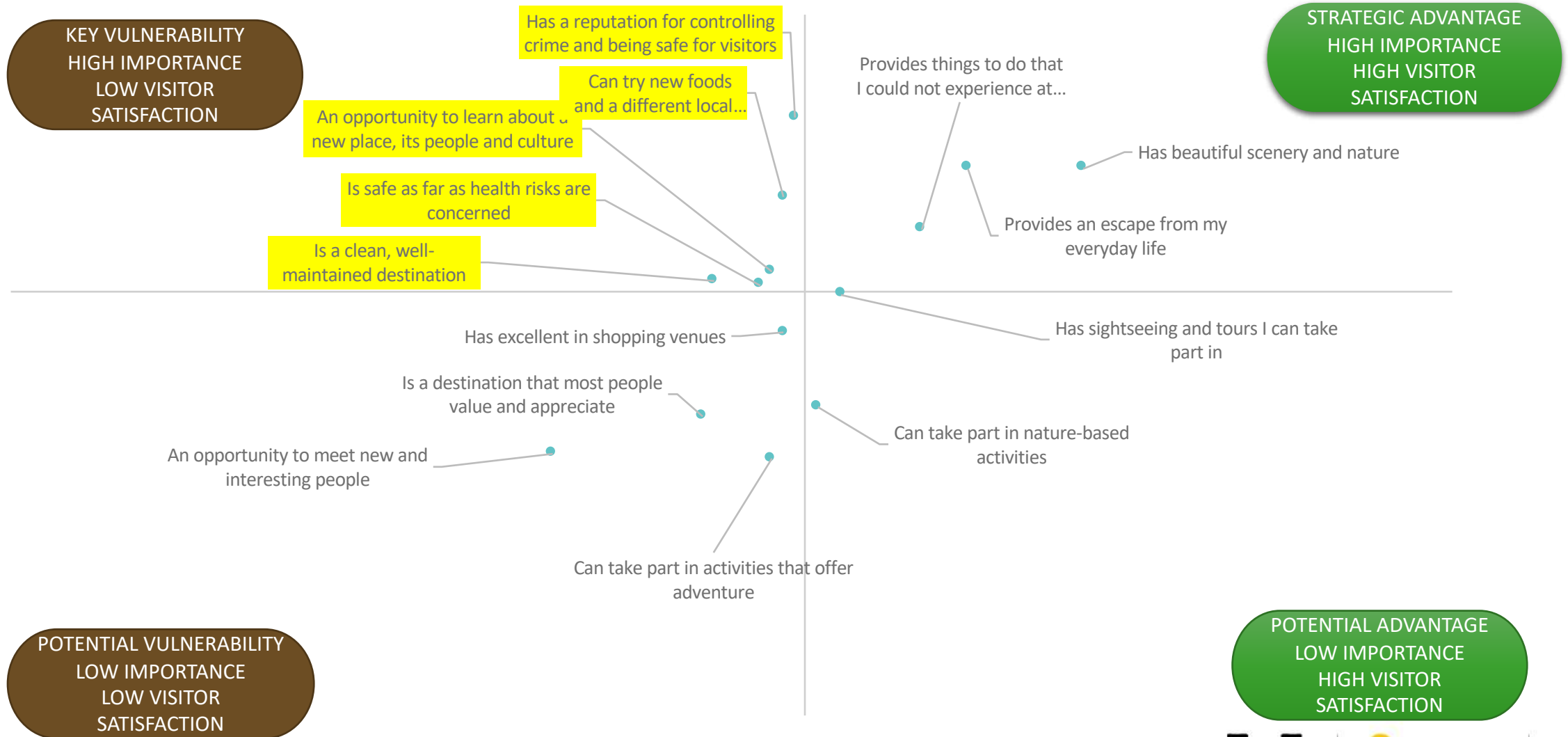
An opportunity to meet new and interesting people



	May-21	Jun-21	Sept-21	May-22
Very Good (4)	22%	12%	24%	19%
Somewhat Good (3)	46%	52%	54%	51%
Somewhat Poor (2)	16%	18%	10%	15%
Very Poor (1)	3%	3%	1%	3%
Don't know	14%	15%	10%	11%
BASE	325	306	307	358
MEAN	3.00	2.88	3.13	2.97

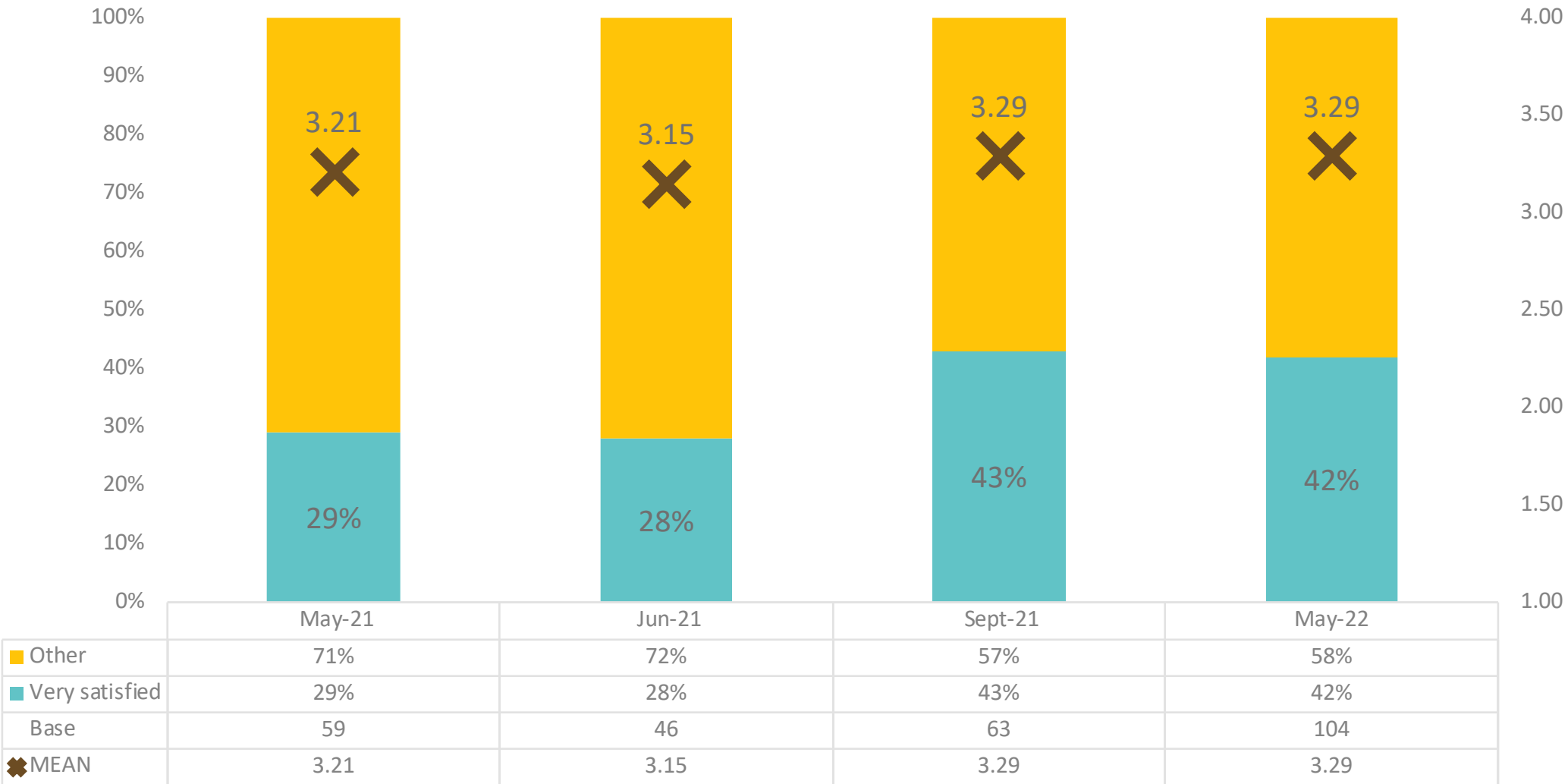


NEED-GAP ANALYSIS



ACCOMMODATIONS – SATISFACTION

4PT RATING SCALE

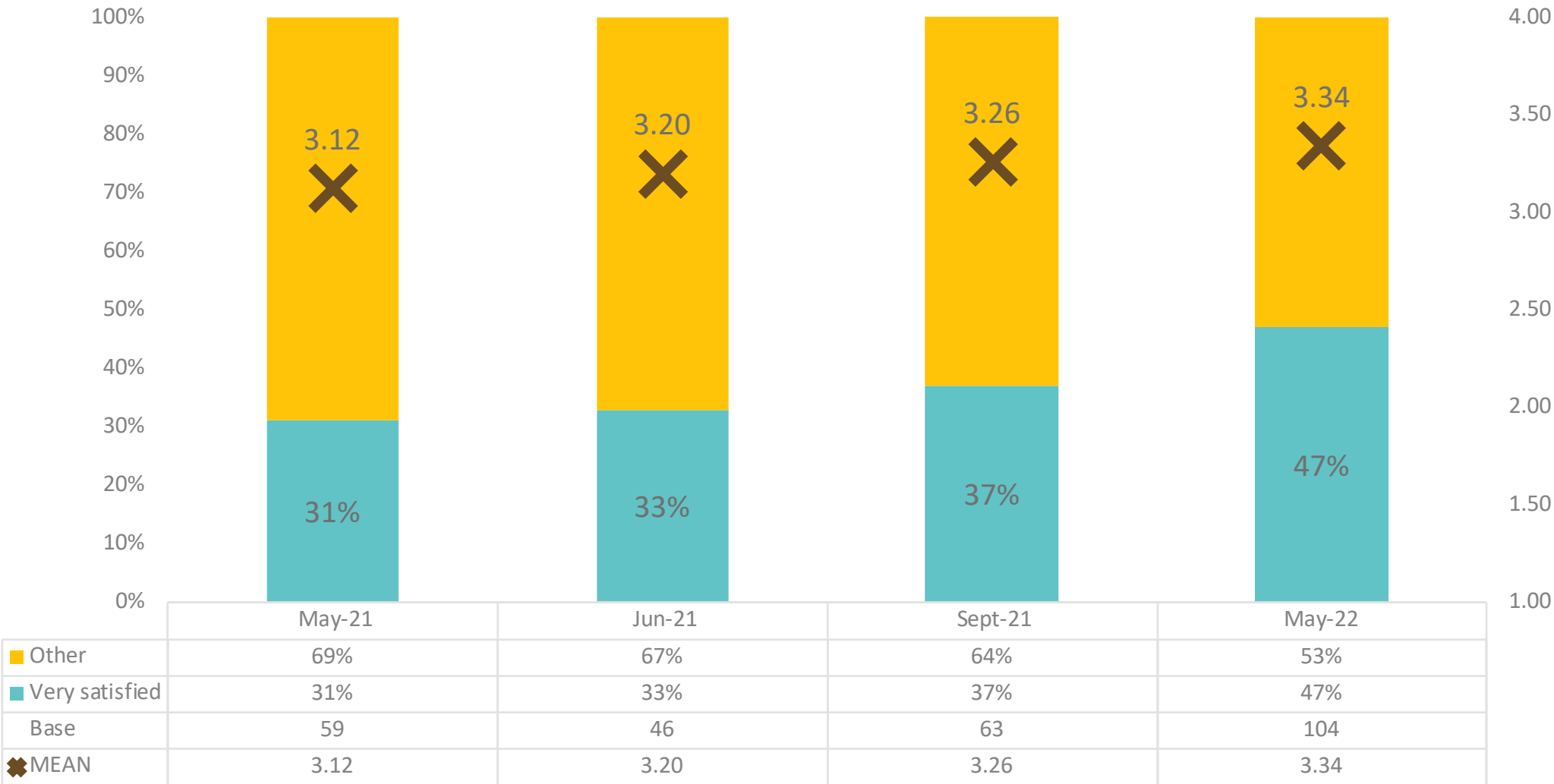


Caution
small
base



VISITORS FEEL WELCOME – SATISFACTION

4PT RATING SCALE

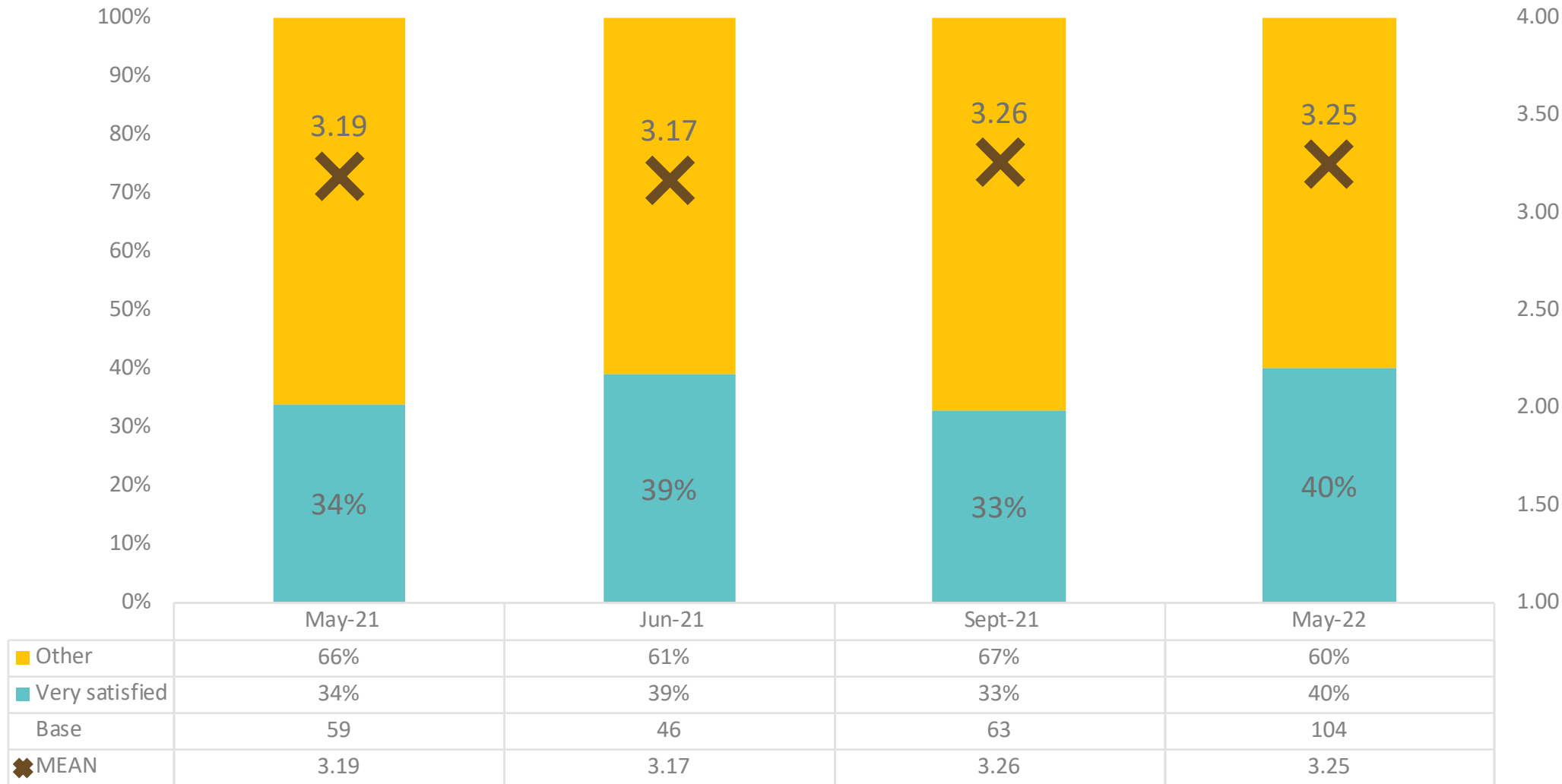


Caution
small
base



VARIETY OF ACTIVITIES – SATISFACTION

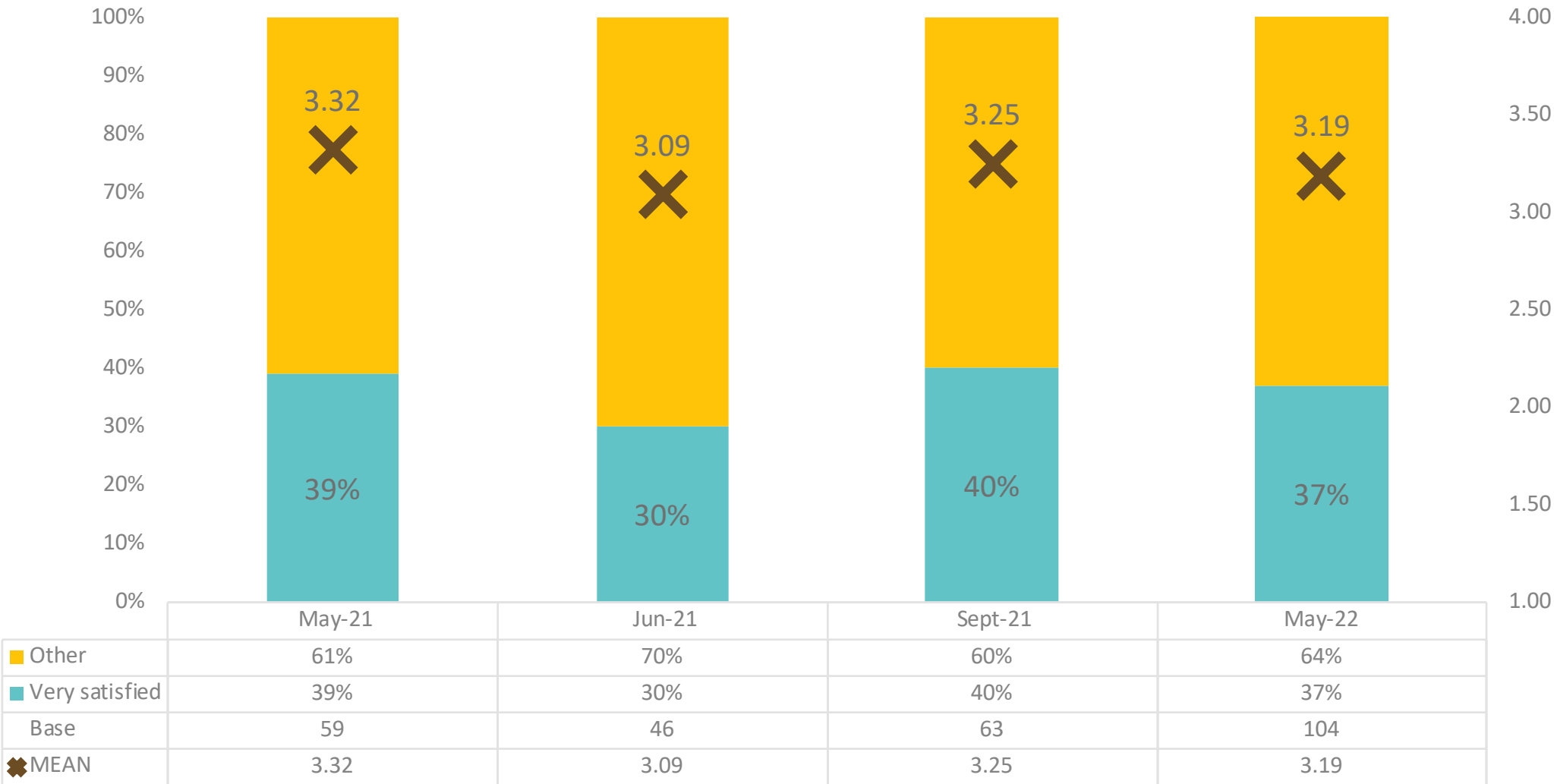
4PT RATING SCALE



Caution
small
base

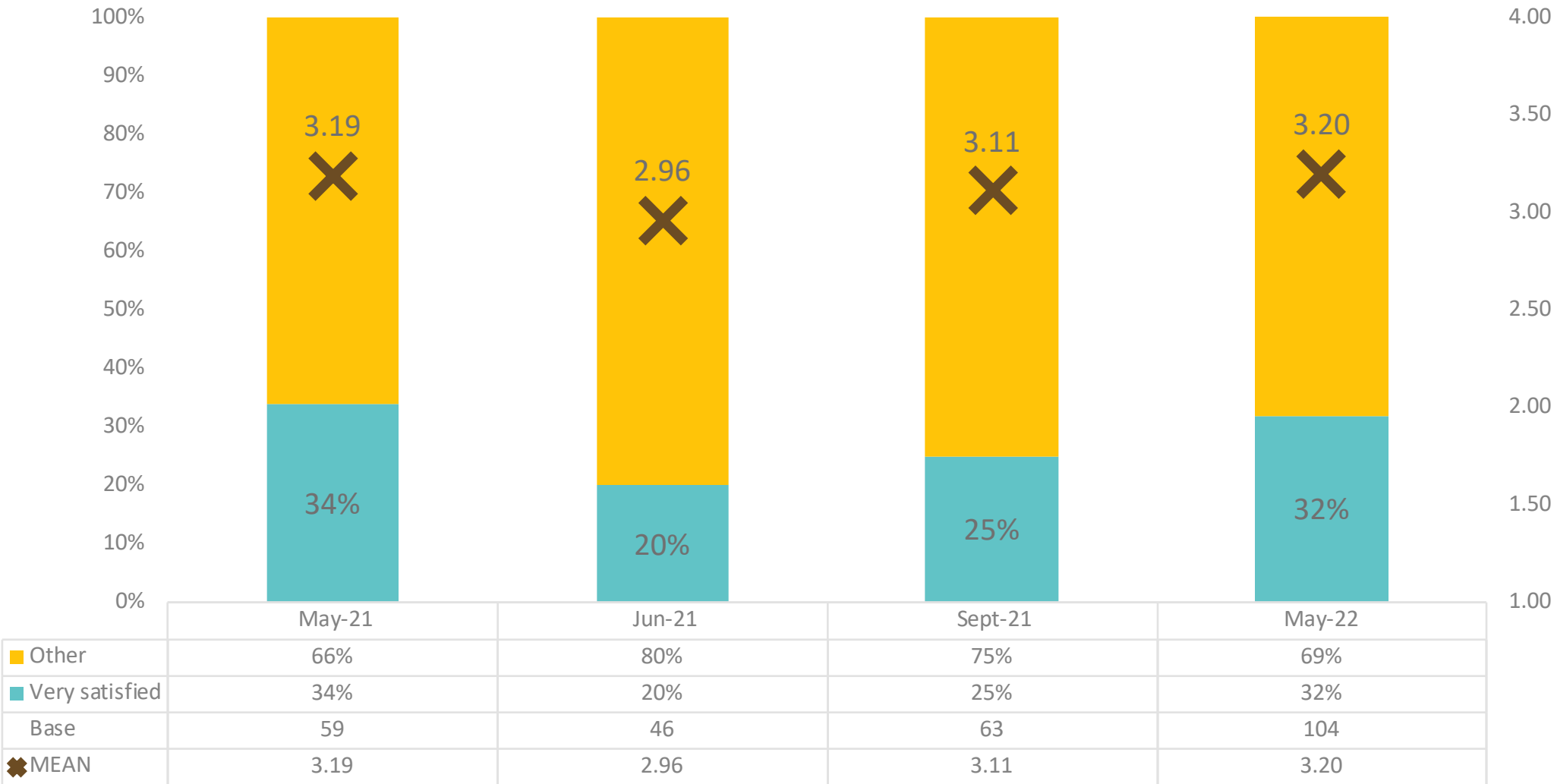
SHOPPING OPTIONS – SATISFACTION

4PT RATING SCALE



QUALITY CUSTOMER SERVICE – SATISFACTION

4PT RATING SCALE

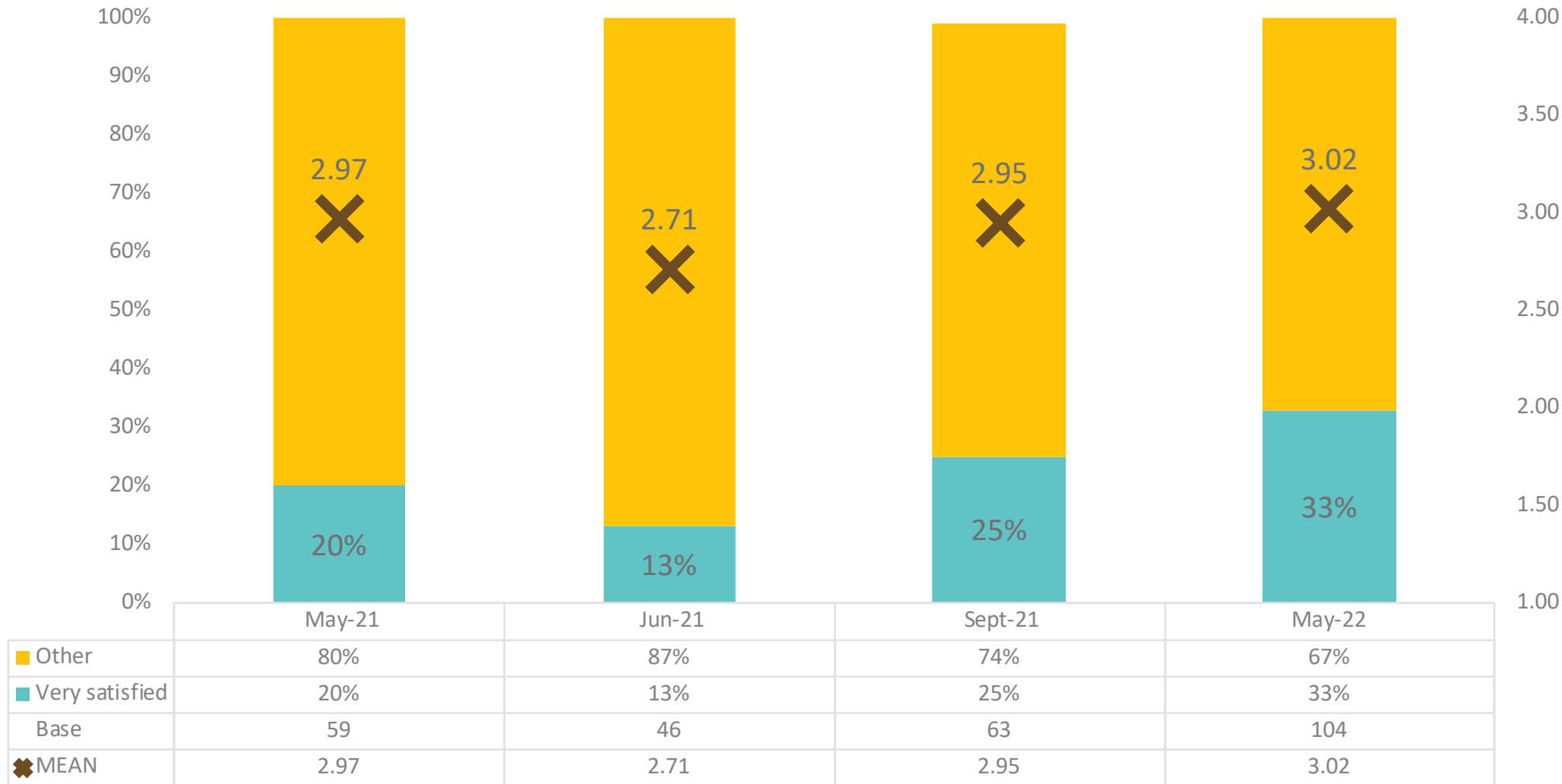


Caution
small
base



TRANSPORTATION OPTIONS – SATISFACTION

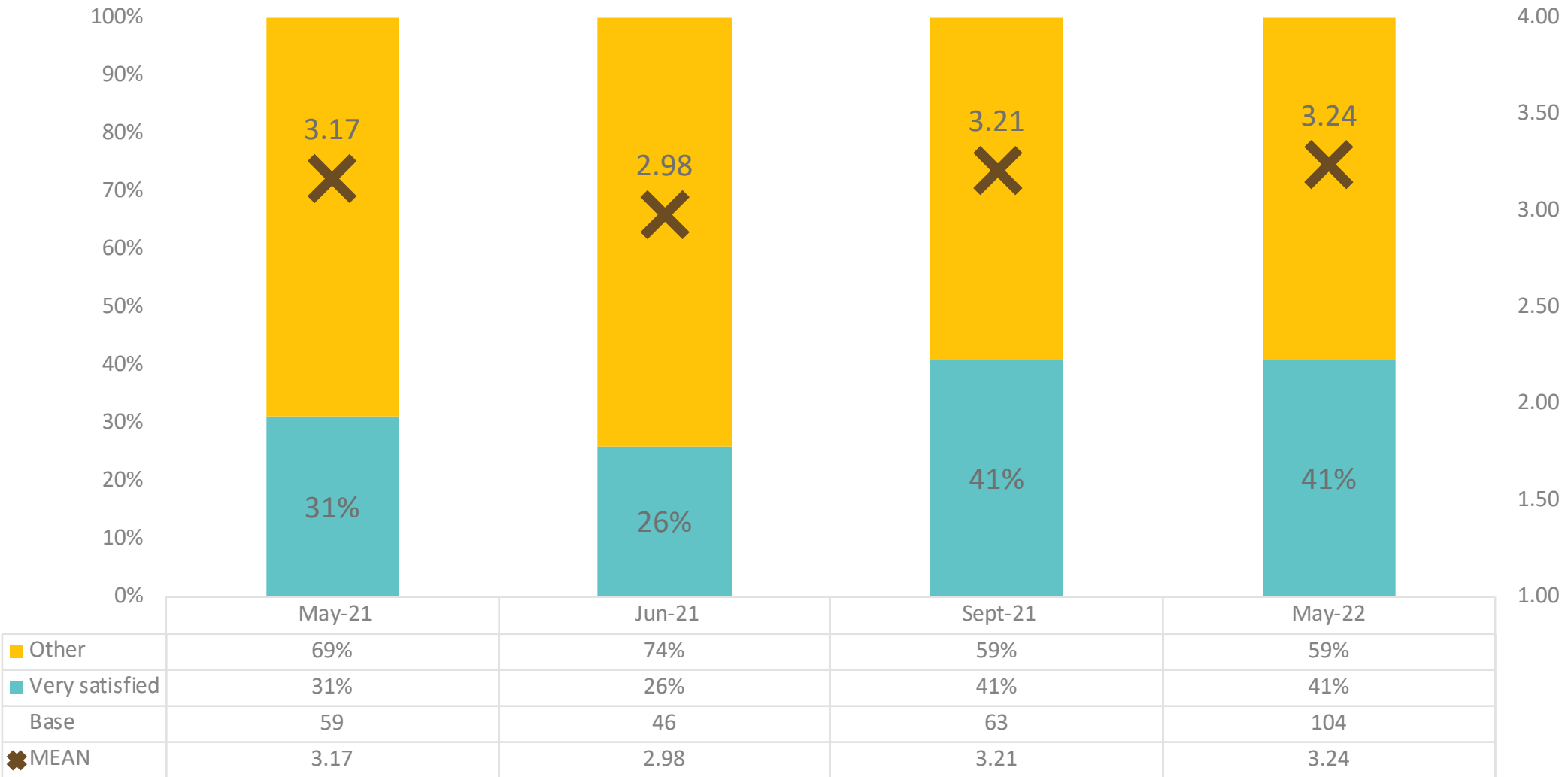
4PT RATING SCALE



Caution
small
base

OVERALL VALUE – SATISFACTION

4PT RATING SCALE



Caution
small
base



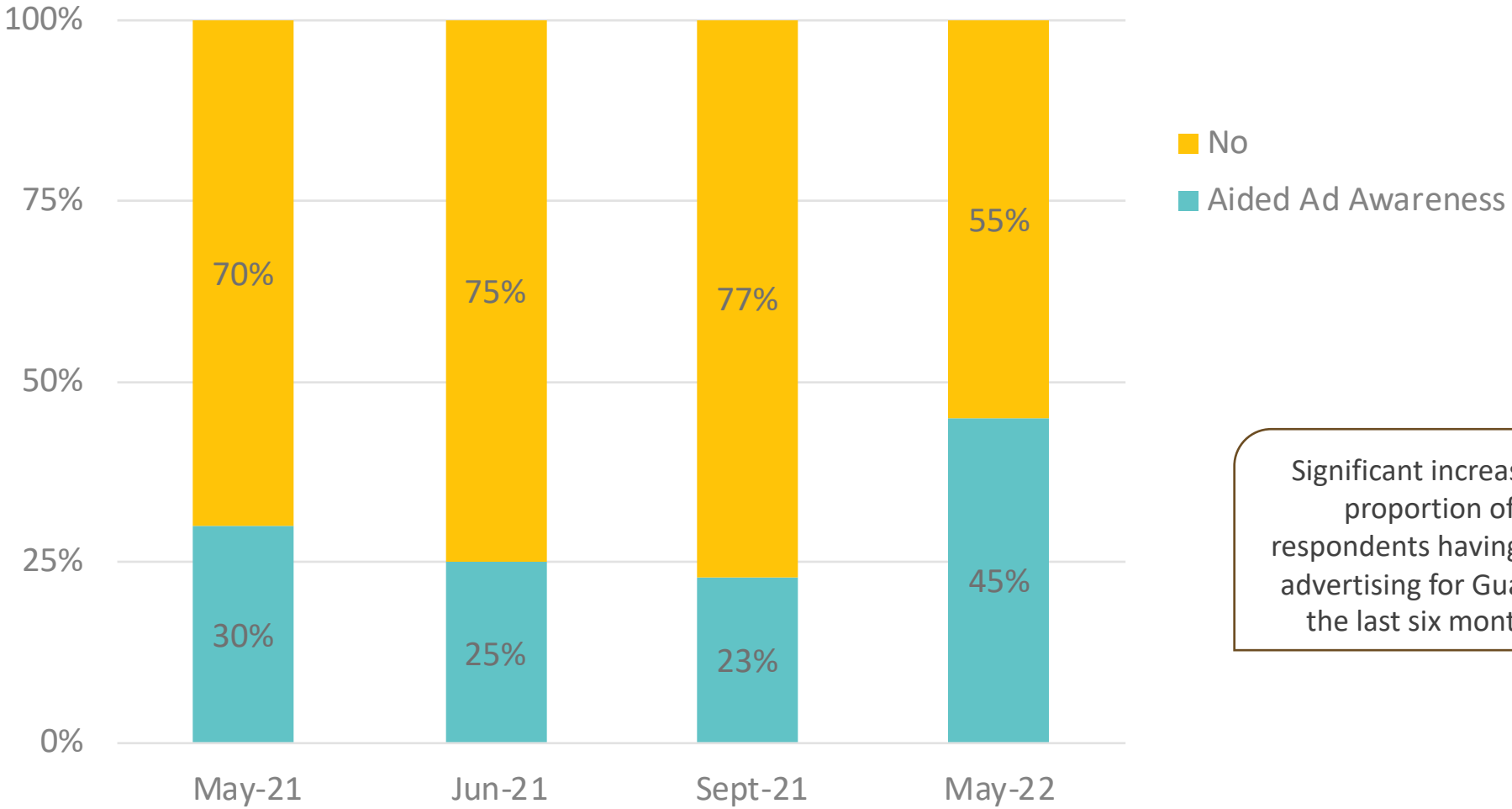


SECTION 4

MARKETING & COMMUNICATIONS



AIDED ADVERTISING AWARENESS



SOURCES OF INFORMATION ABOUT GUAM

	May 2021	June 2021	Sept 21	May 2022
BASE	59	46	63	104
<i>Television</i>	32%	22%	32%	25%
<i>Travel guide websites</i>	14%	20%	24%	15%
<i>Recommendations – friends/ family</i>	25%	24%	22%	16%
<i>Social media</i>	7%	13%	11%	12%
<i>GVB website</i>	5%	11%	5%	8%
<i>Travel agents</i>	14%	9%	5%	13%
<i>Radio</i>	3%	-	2%	3%
<i>Other</i>	-	2%	-	2%



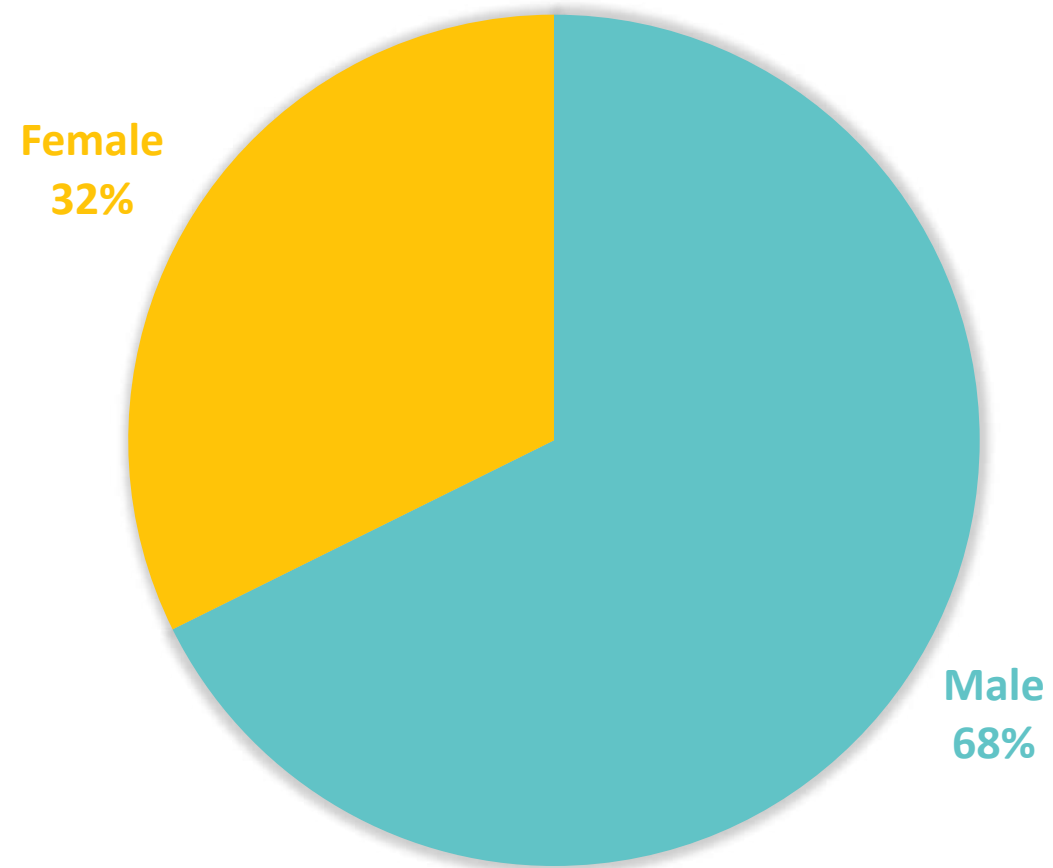


SECTION 5

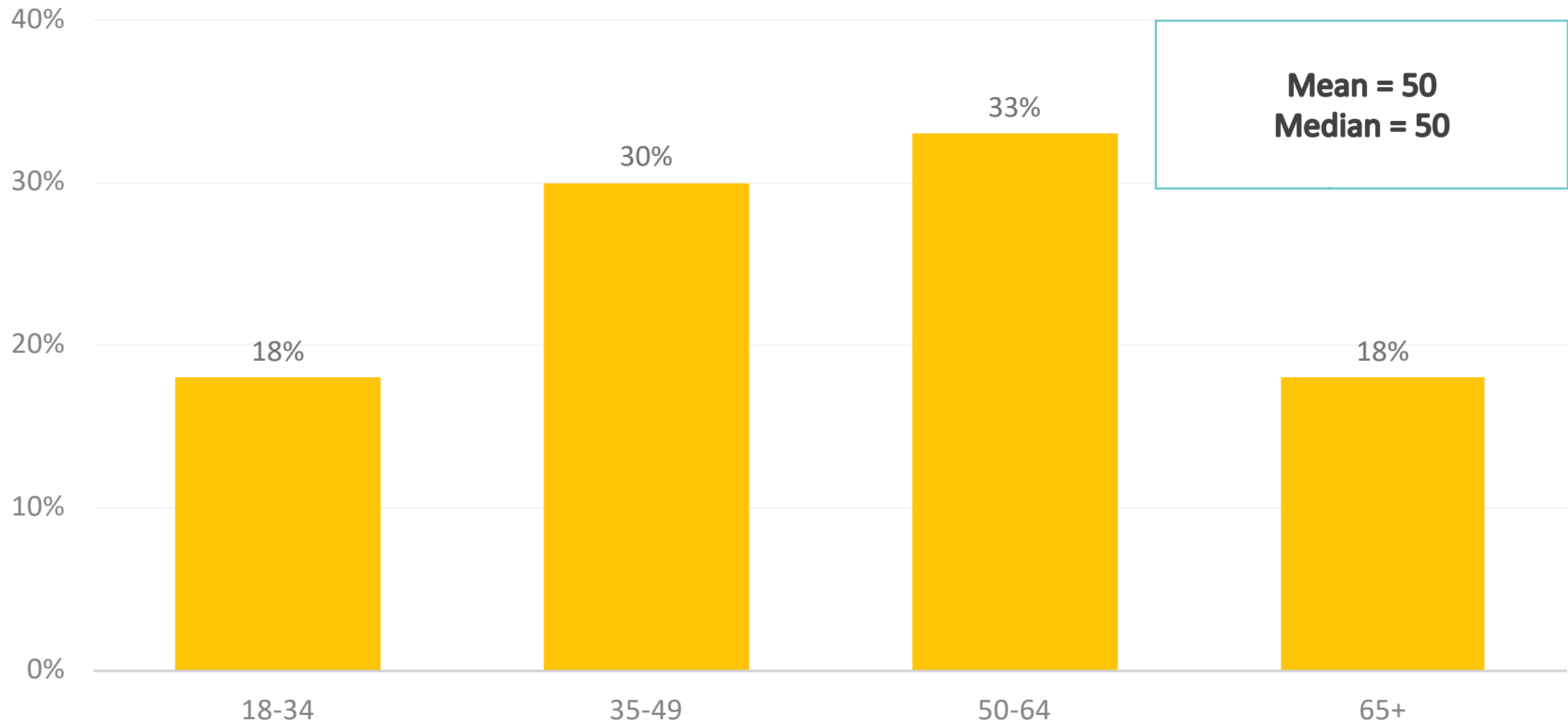
PROFILE OF RESPONDENTS



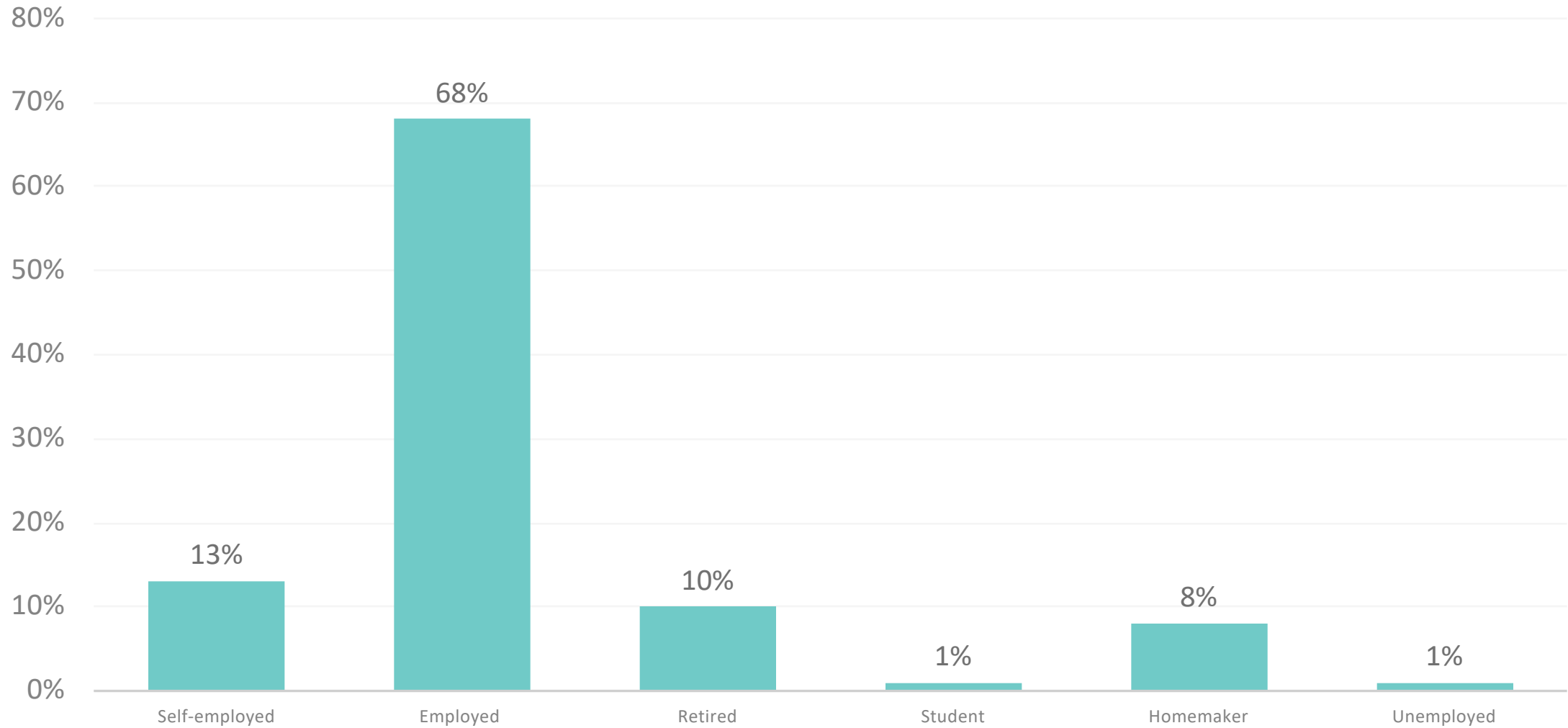
GENDER



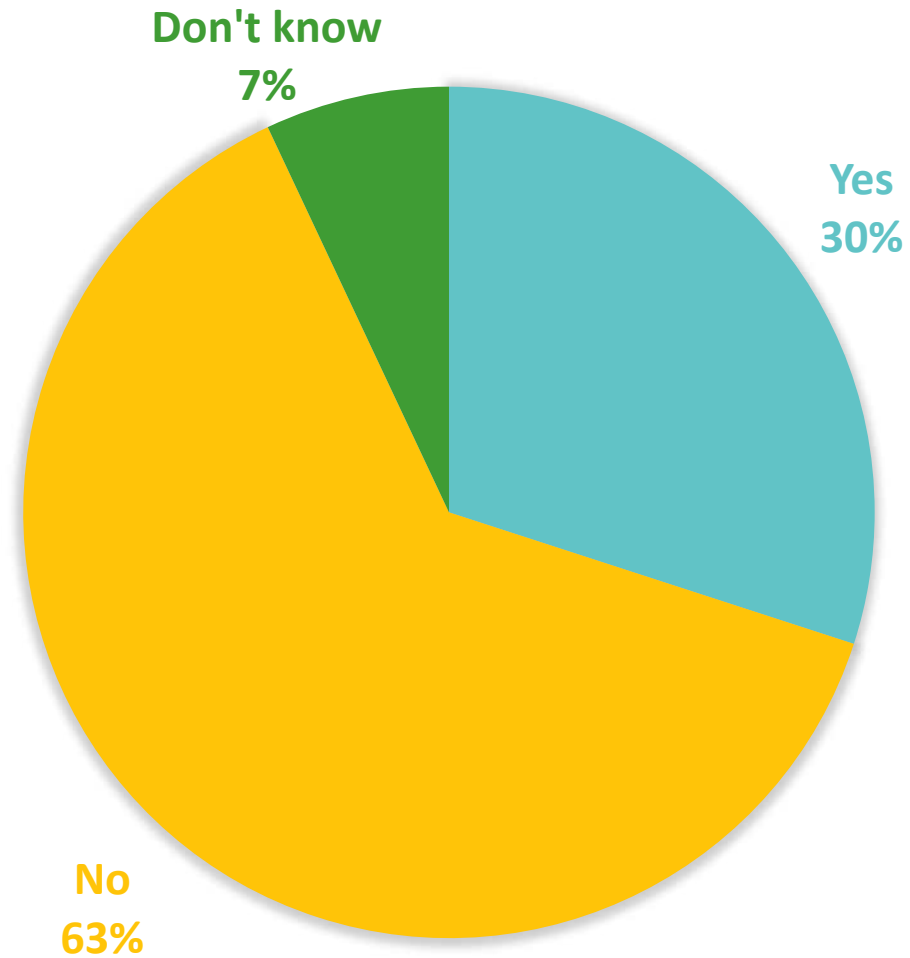
AGE



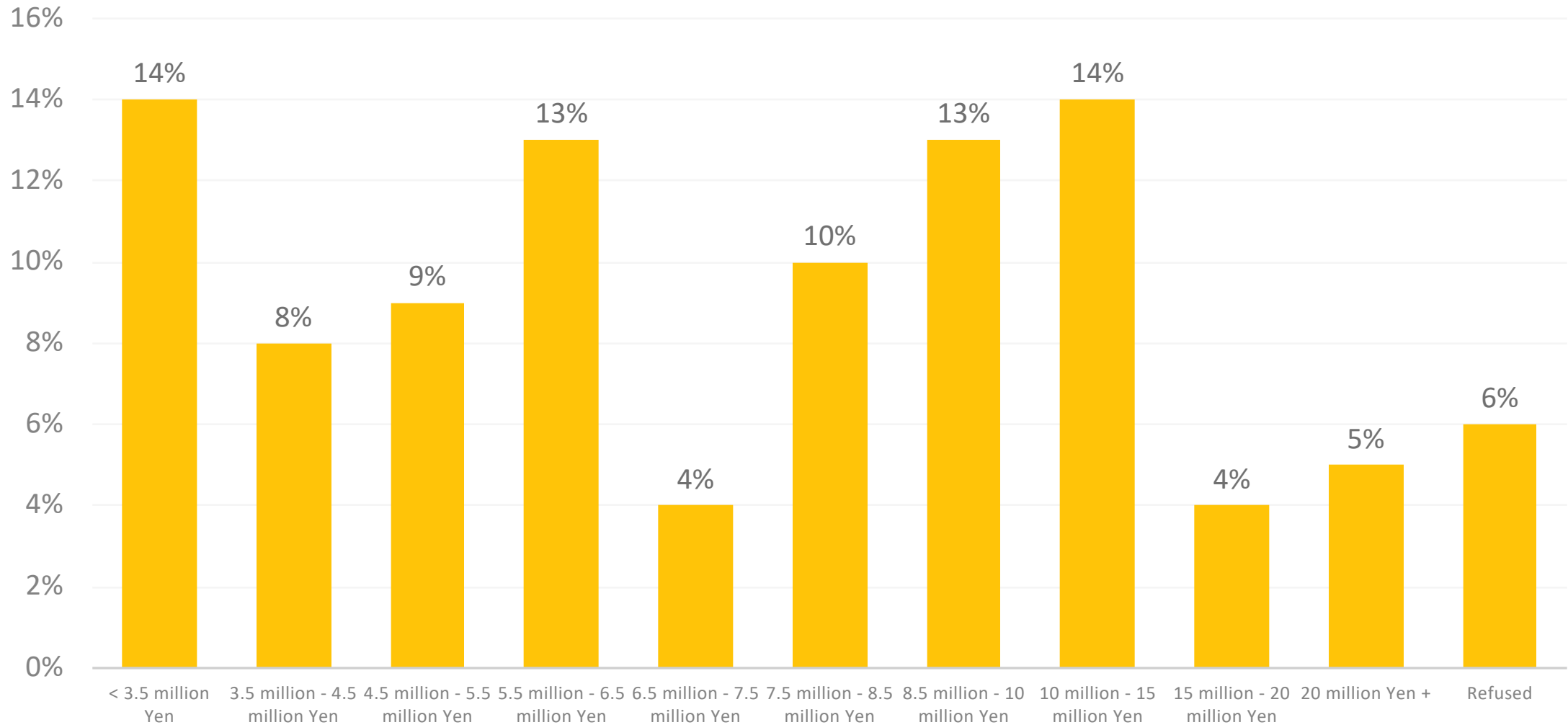
EMPLOYMENT STATUS



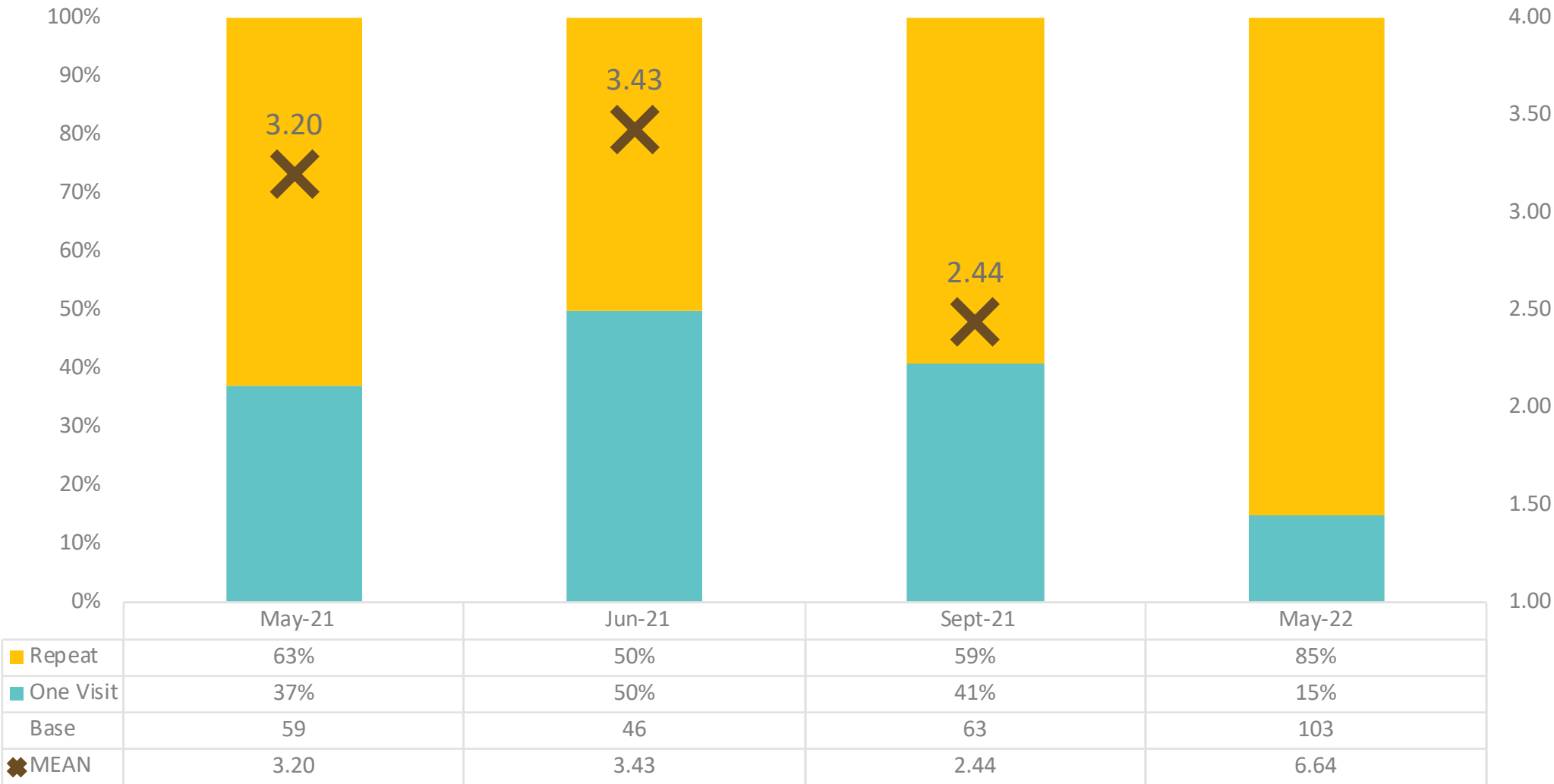
INCENTIVE TRIPS



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

