



Guam Visitors Bureau

Japan In-Market Insight Report

MAY 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 April 27-29, 2021. A total of 325 surveys were collected during this period.
- The margin of error for a sample of 325 is +/- 5.44 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 +/- 5.44 percentage points.



Key Highlights

- A majority (73%) of those polled do not intend to travel internationally until the pandemic is over.
- Nearly 1 in 3 (30%) are considering Guam as a possible destination for a future vacation, second only to Hawaii at 38%.
- Of those who said they would consider Guam as a possible future travel destination, 23% indicate they intend to vacation outside of Japan in the next 12 months, with an additional 17% indicating that they would travel in 1-2 years. More than half (59%) indicate they would not travel until the pandemic ends.
- “Safety is an important factor when traveling internationally” was identified by 68% of respondents as a very important factor in choosing a destination, by far the most selected item tested.



Key Highlights (cont.)

- While only 14% had reported receiving at least one shot of the COVID-19 vaccine, 76% of respondents will get the vaccine when available to them. One in ten (11%) indicate they will not get vaccinated.
- Half (56%) of respondents indicate they will likely travel less often after the pandemic; only 18% will travel more often.
- The factors that most selected as very important when selecting a destination to visit post-COVID are low rates of COVID-19 (70%) and advanced hygiene measures (54%).
- The majority of likely travelers in Japan (61%) see Guam's plans for improvements to safety measures at the airport, including a digital/ touchless experience using kiosks and QR codes for the customers and border protection/ ESTA process, as added value and are willing to pay a little more for them.



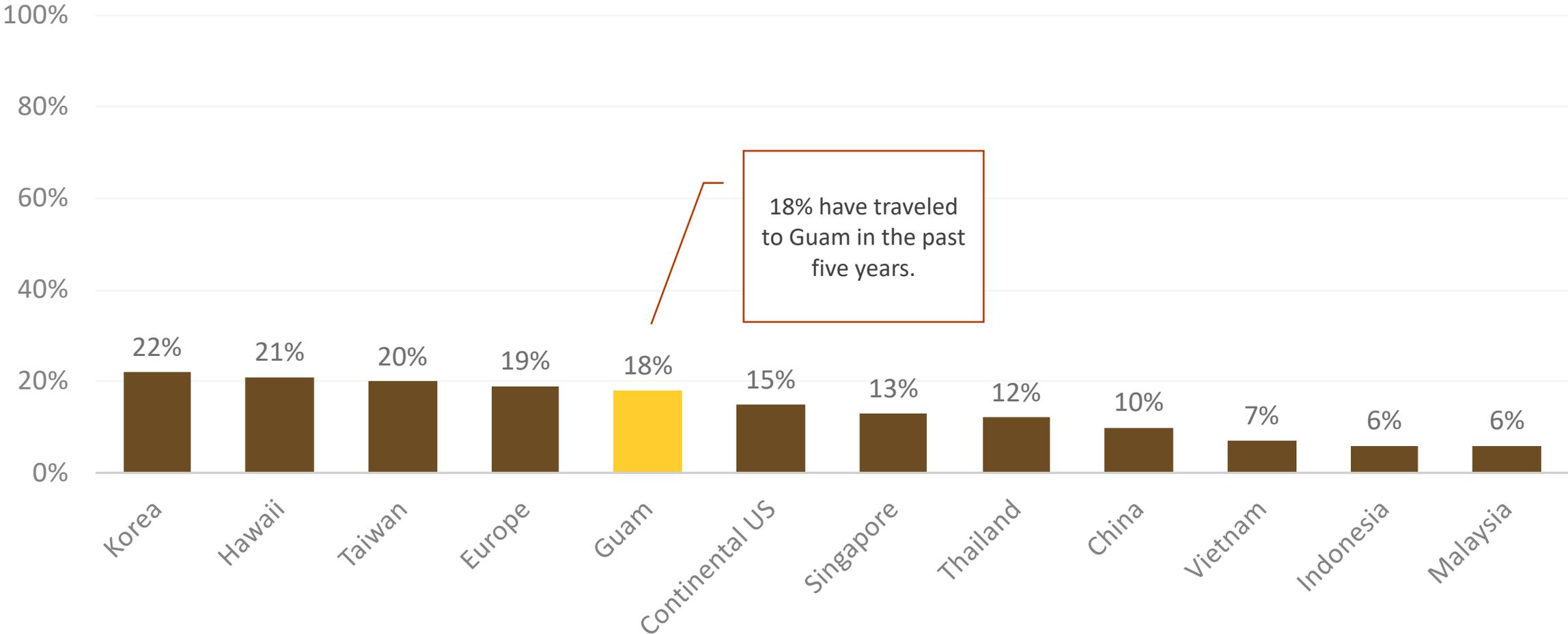


SECTION 1

TRAVEL PLANNING



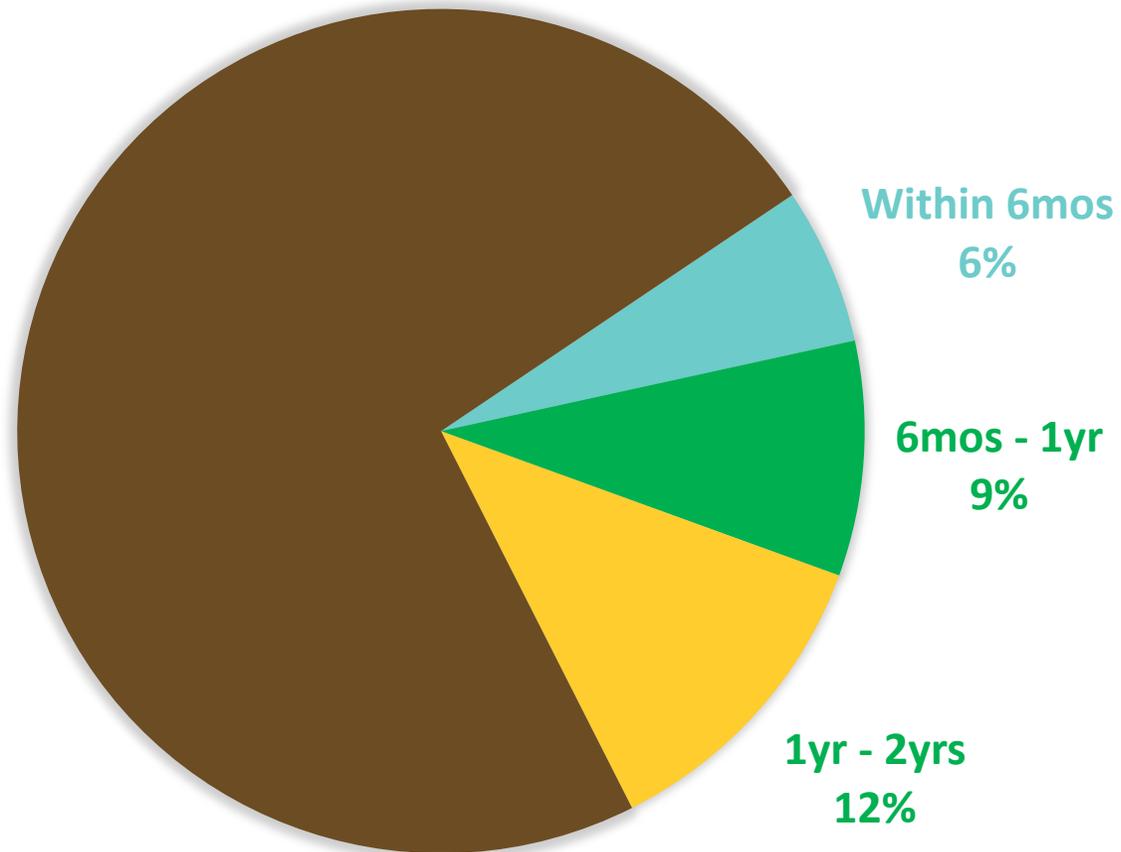
TRAVEL HISTORY



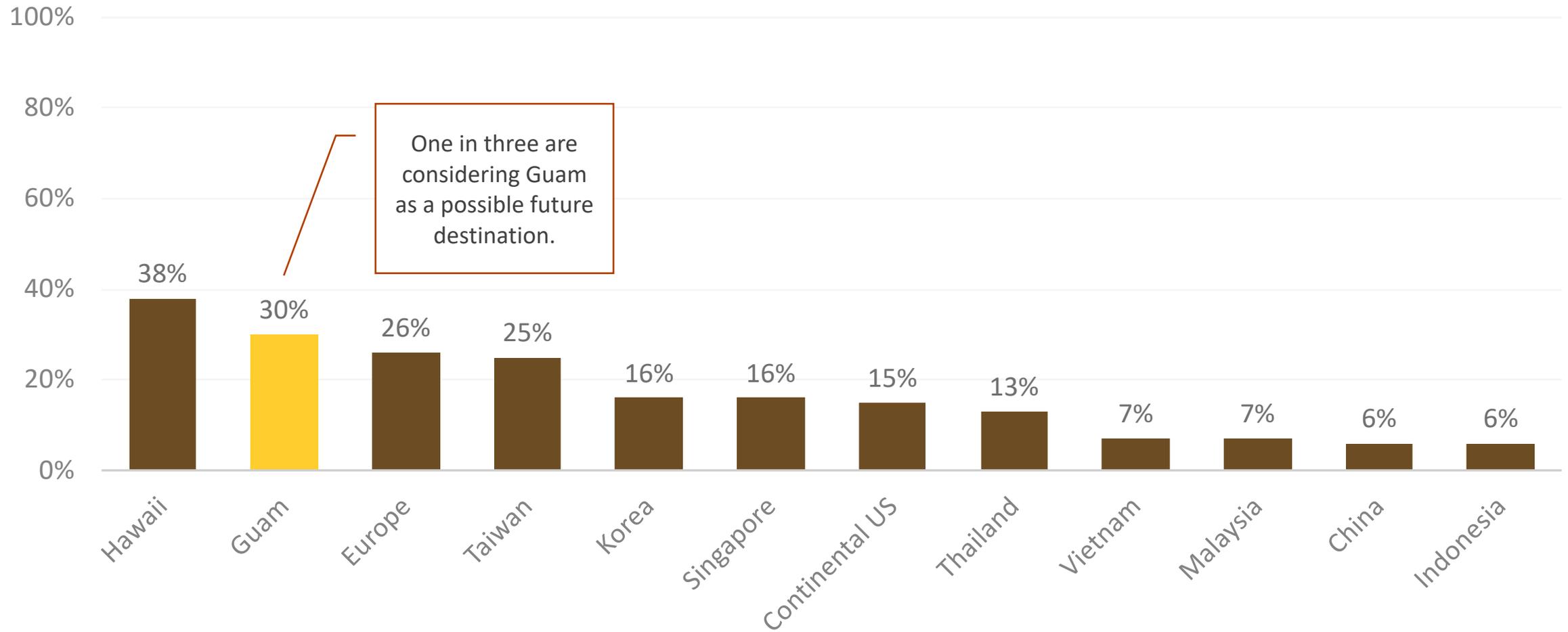
FUTURE TRAVEL PLANS

Majority of those polled do not intend to travel internationally until the pandemic is over.

Will not travel till pandemic ends
73%



POTENTIAL FUTURE TRAVEL DESTINATIONS



TIMING OF FUTURE TRAVEL TO GUAM

1yr - 2yrs, 17%

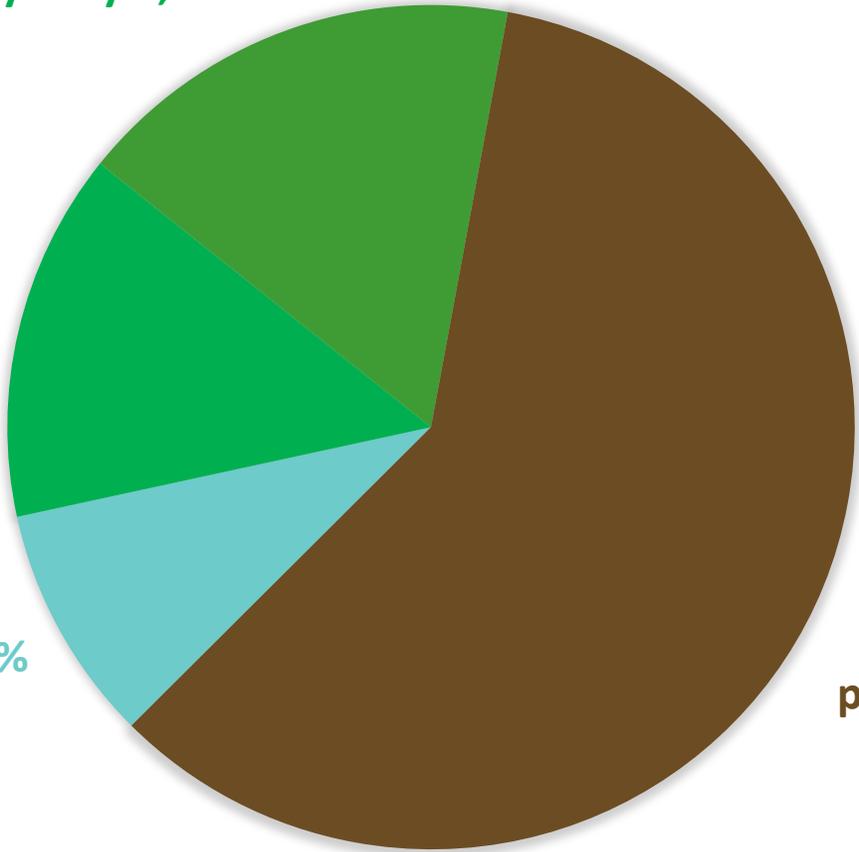
6mos - 1yr, 14%

Within 6mos, 9%

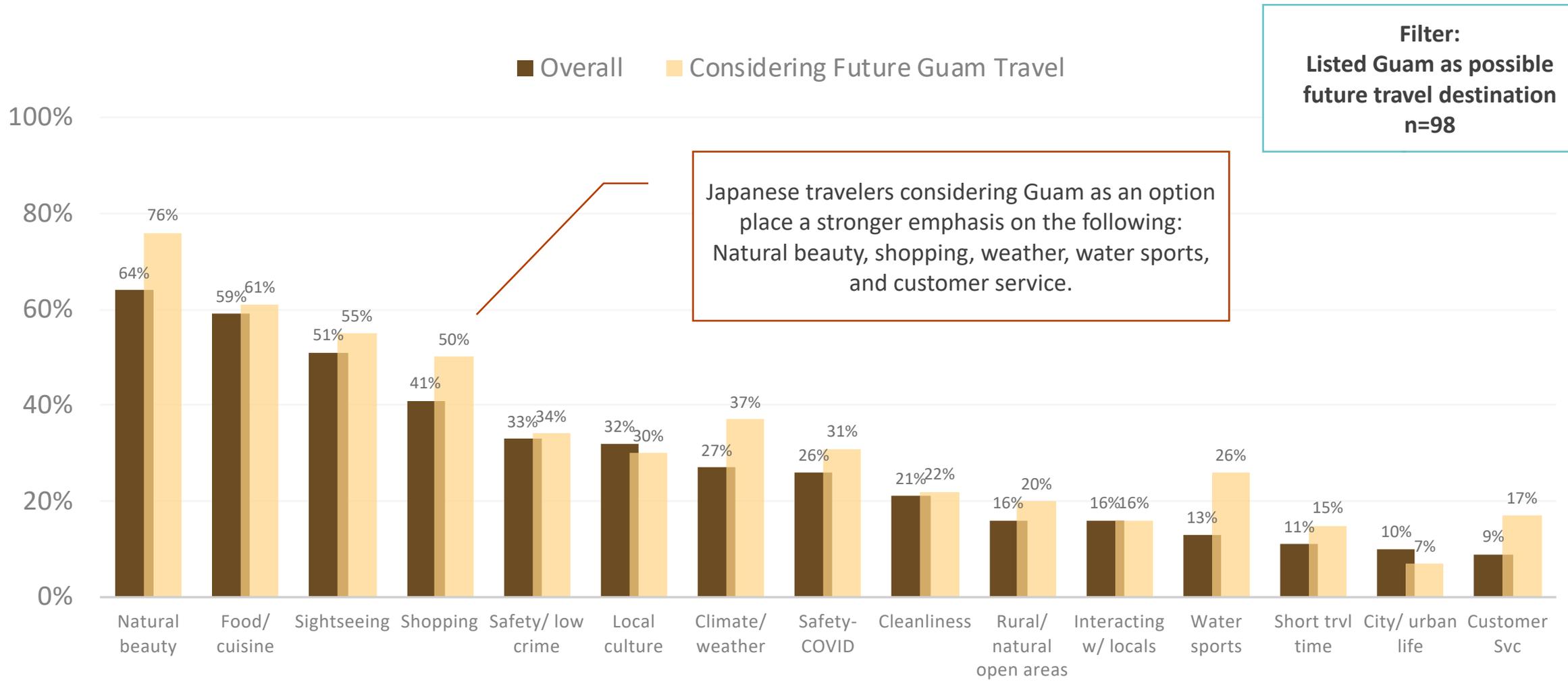
Will not travel till pandemic ends, 59%

Filter:
Listed Guam as possible future travel destination
n=98

1 in 4 who are considering Guam as a possible future destination intends to travel internationally within the next year.

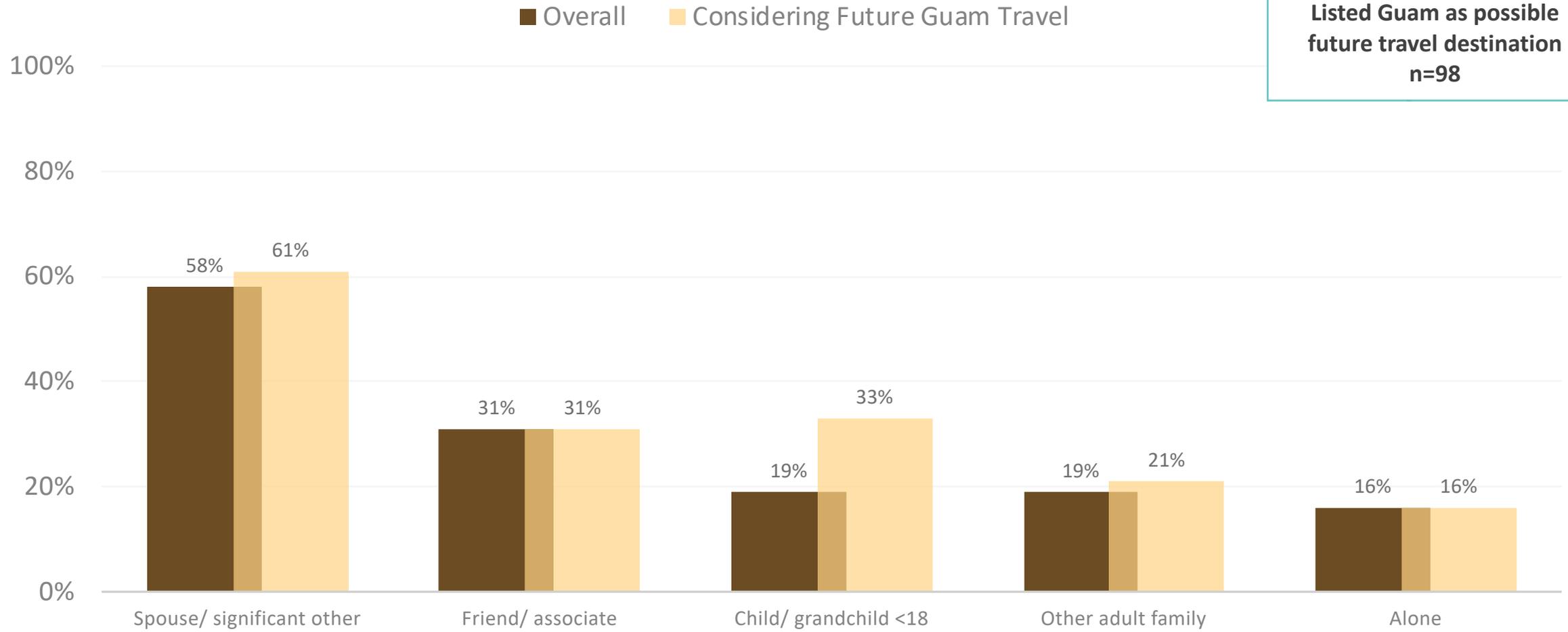


APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS



FUTURE INTERNATIONAL TRAVEL PARTY

Filter:
Listed Guam as possible
future travel destination
n=98



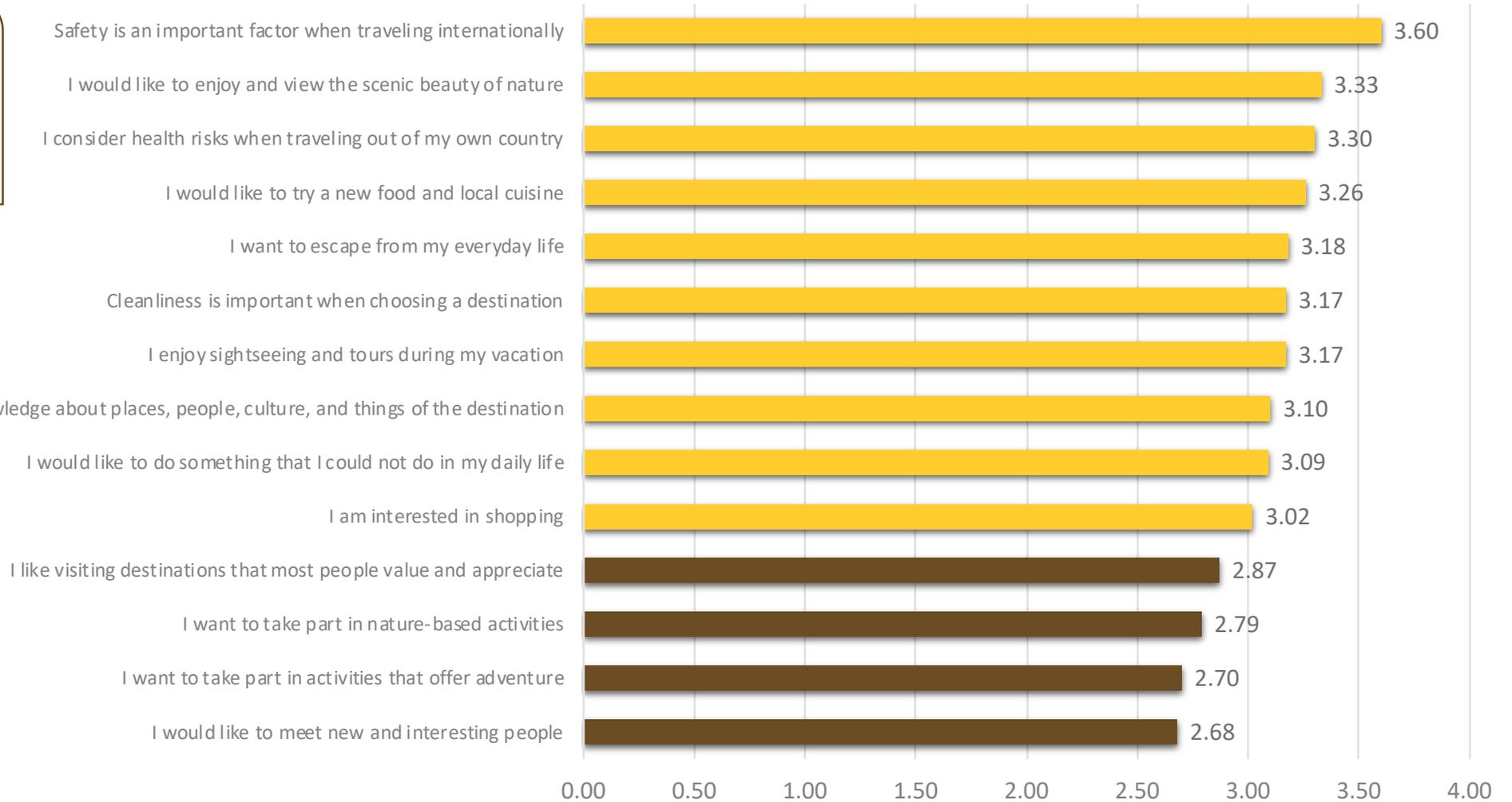
Q: Thinking of your travel plans post-COVID-19, who are you most looking forward to traveling with to an international destination?



DESTINATION SELECTION FACTORS – IMPORTANCE

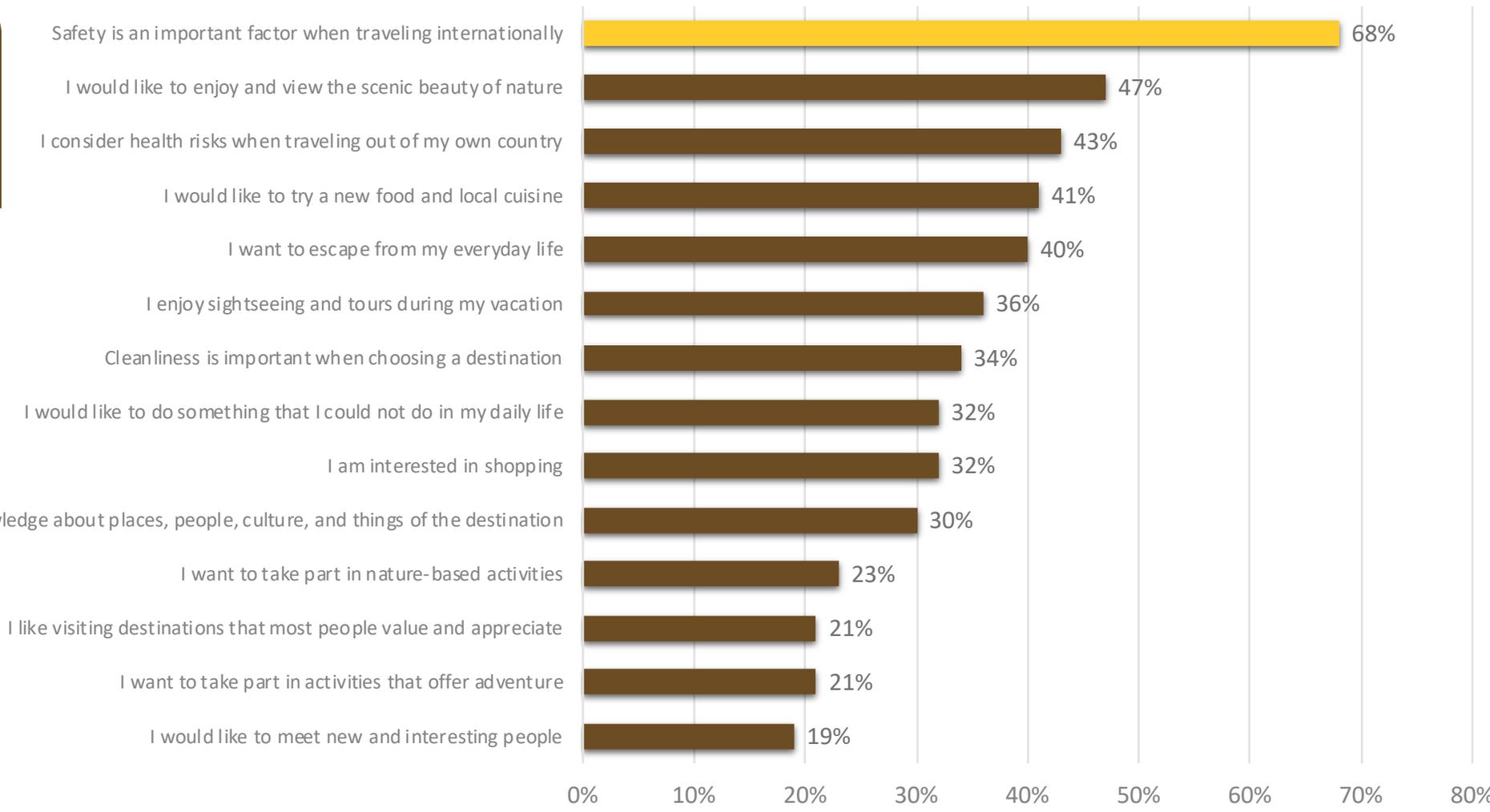
MEAN SCORE 4PT SCALE

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

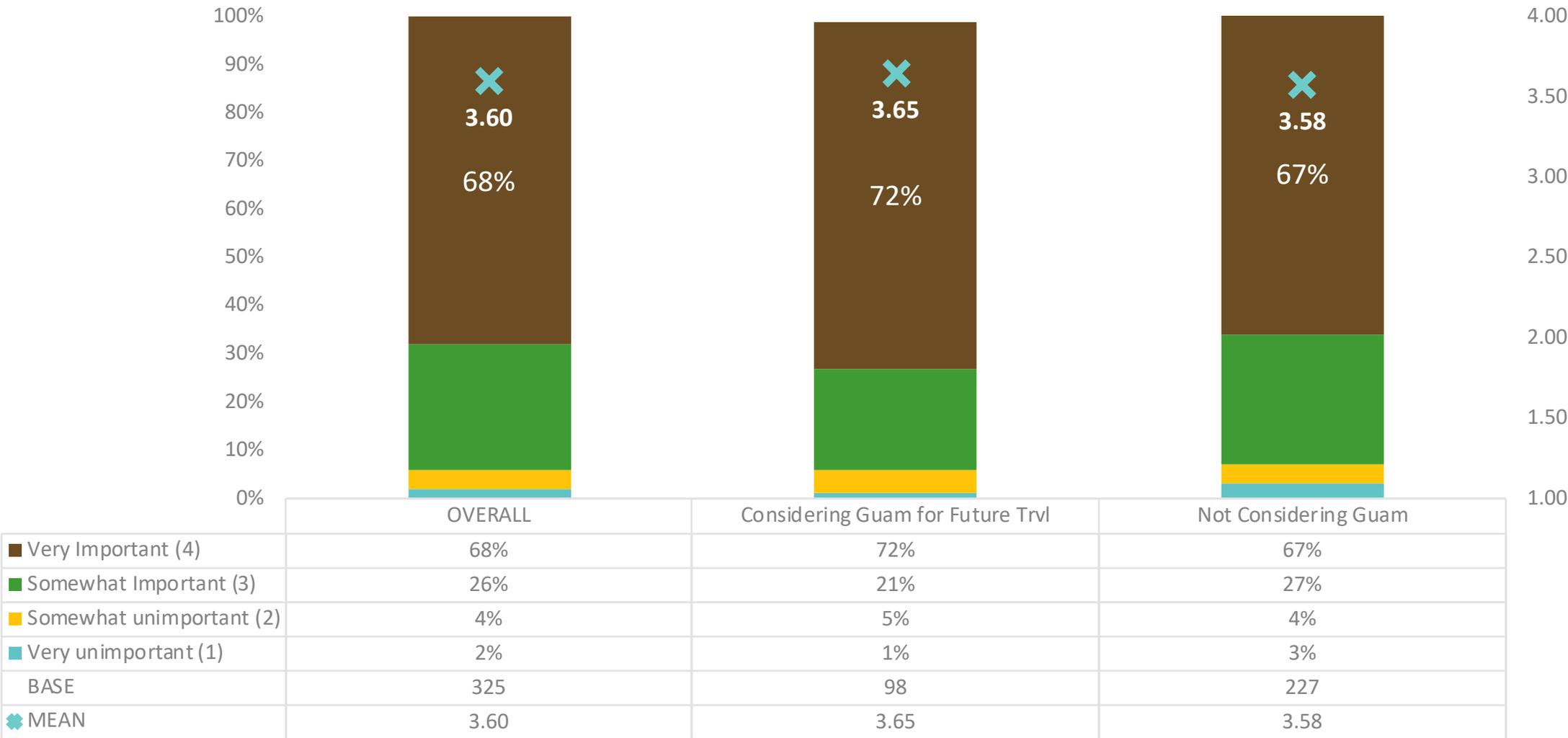


DESTINATION SELECTION FACTORS – VERY IMPORTANT / TOP BOX

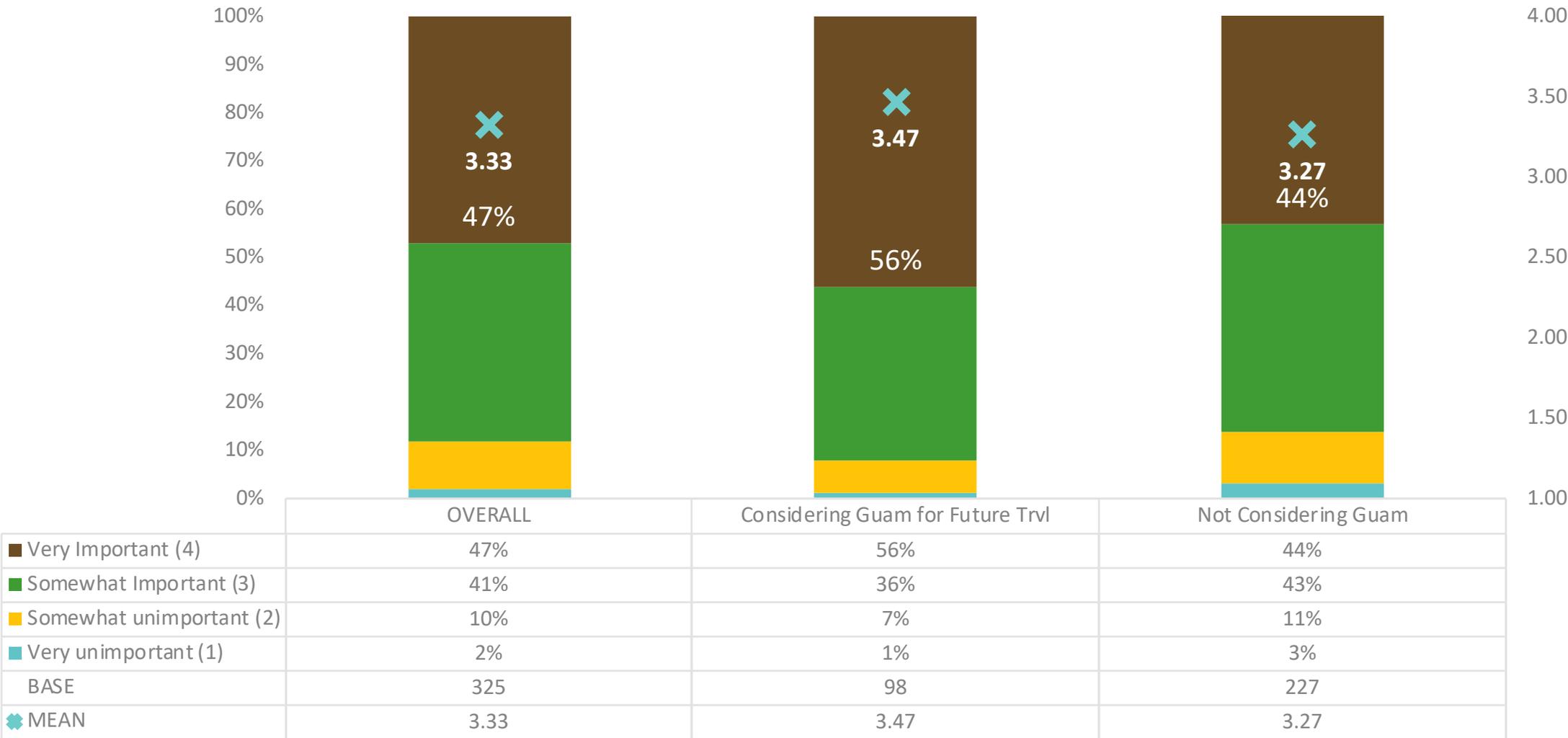
Just one (yellow) selection factor received a top box (very important) score above 50%



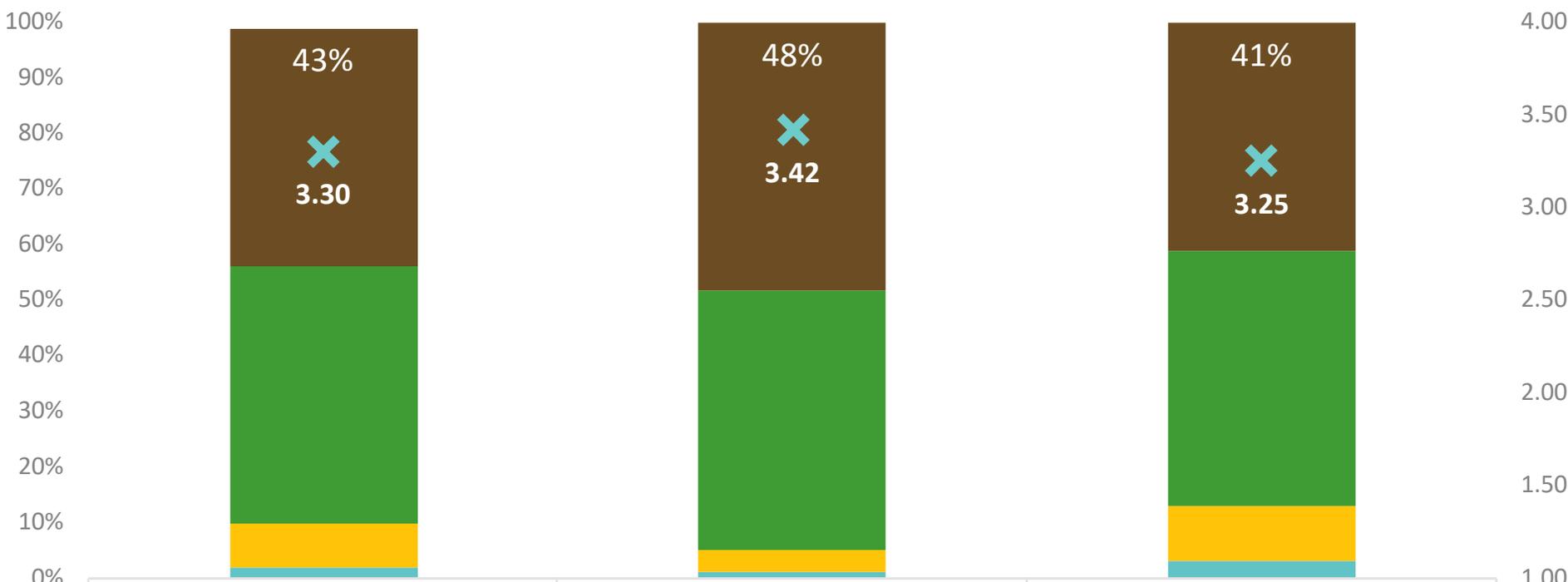
Safety is an important factor when traveling internationally



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



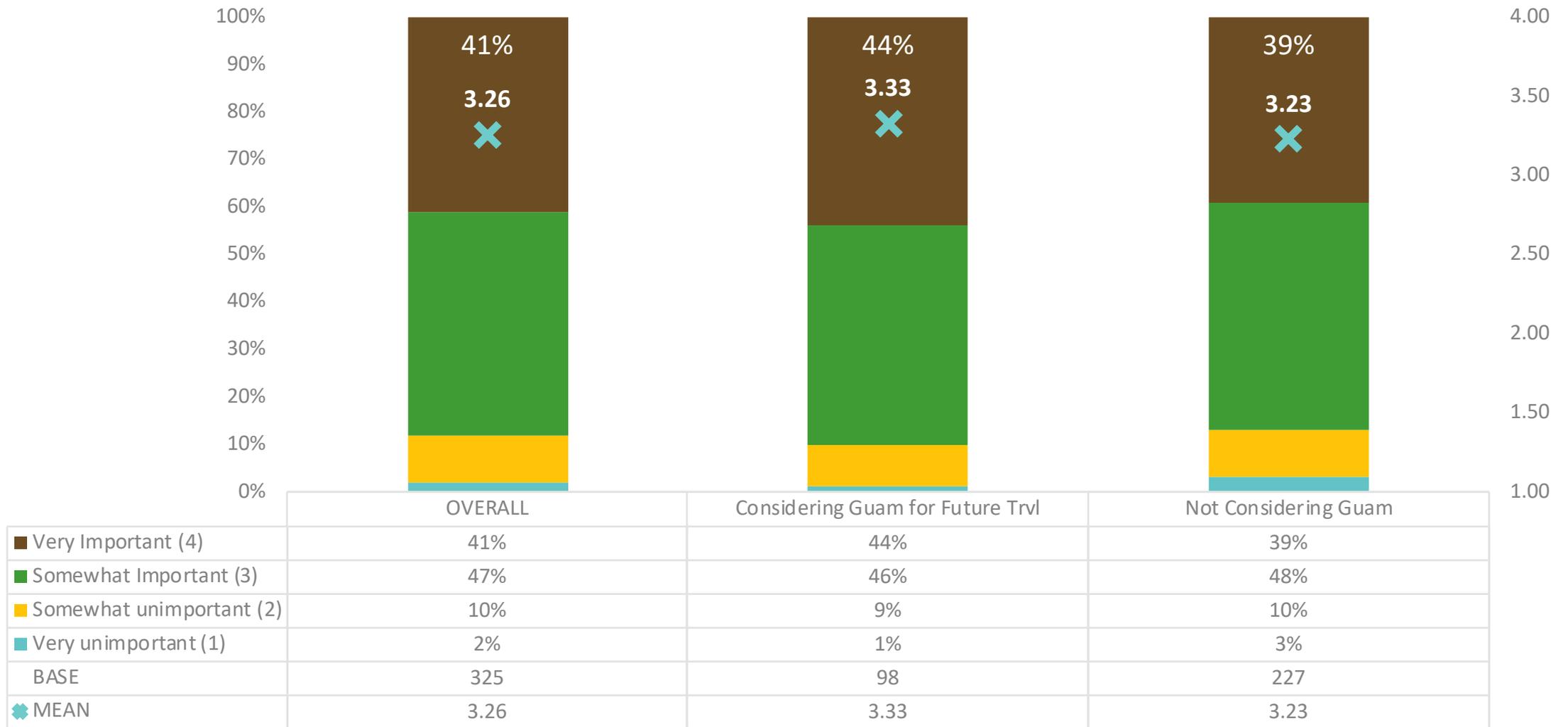
I consider health risks when traveling out of my own country



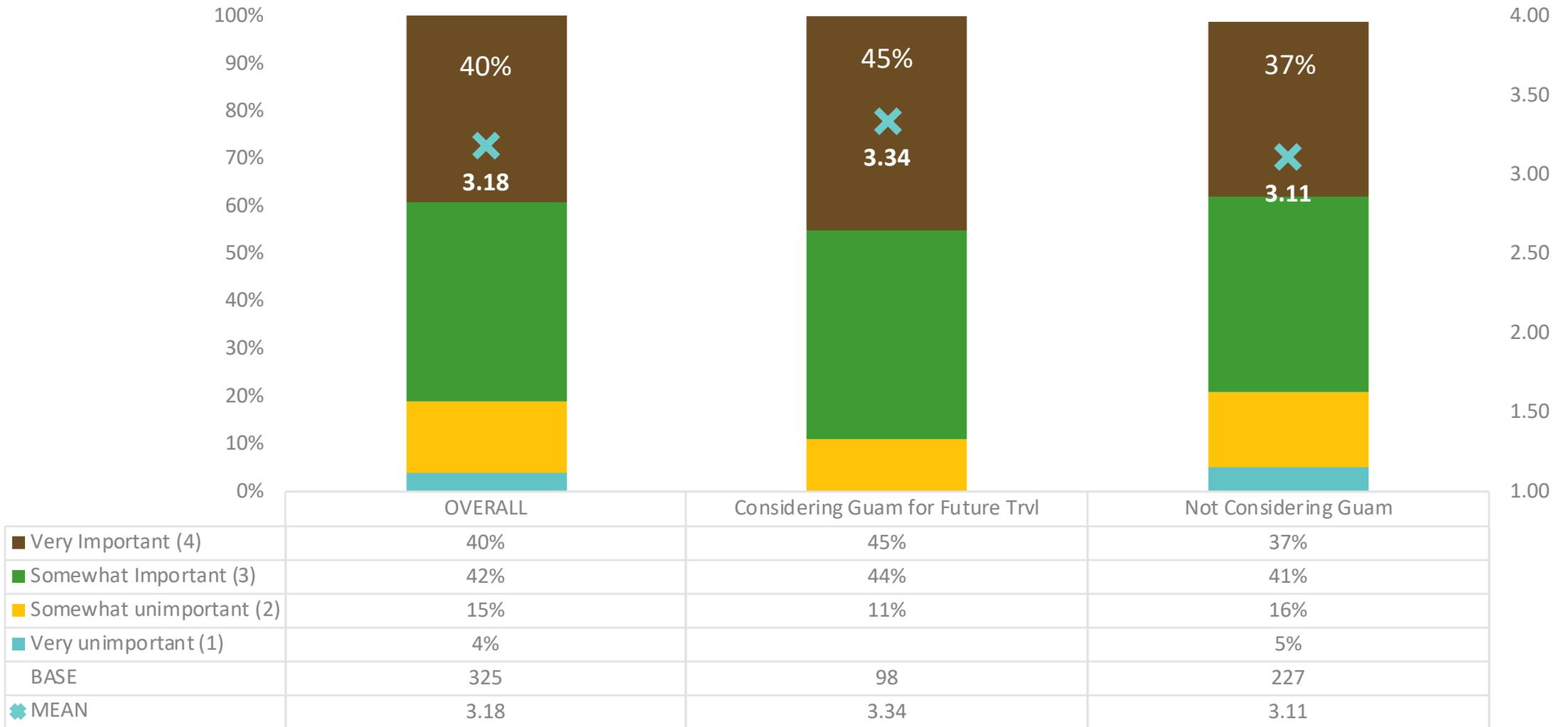
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	43%	48%	41%
Somewhat Important (3)	46%	47%	46%
Somewhat unimportant (2)	8%	4%	10%
Very unimportant (1)	2%	1%	3%
BASE	325	98	227
MEAN	3.30	3.42	3.25



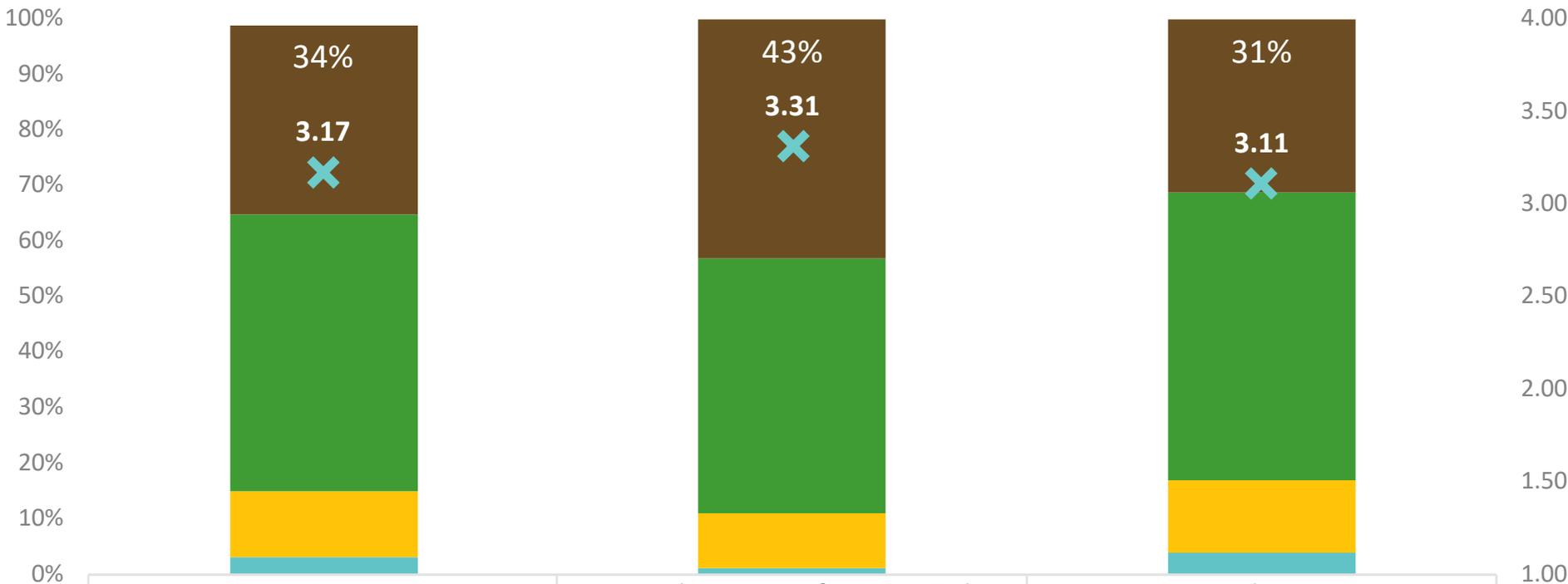
I would like to try a new food and local cuisine



I want to escape my everyday life



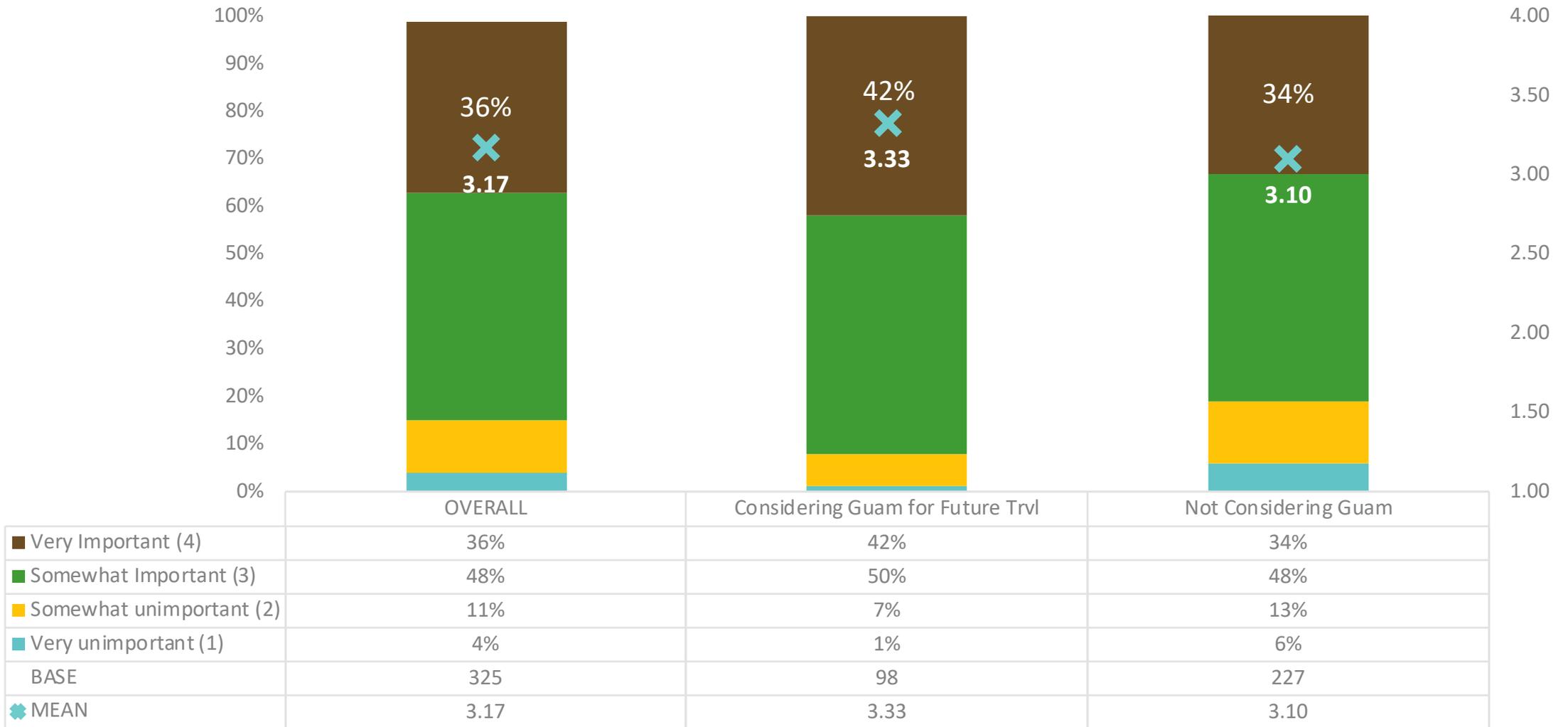
Cleanliness is important when choosing a destination



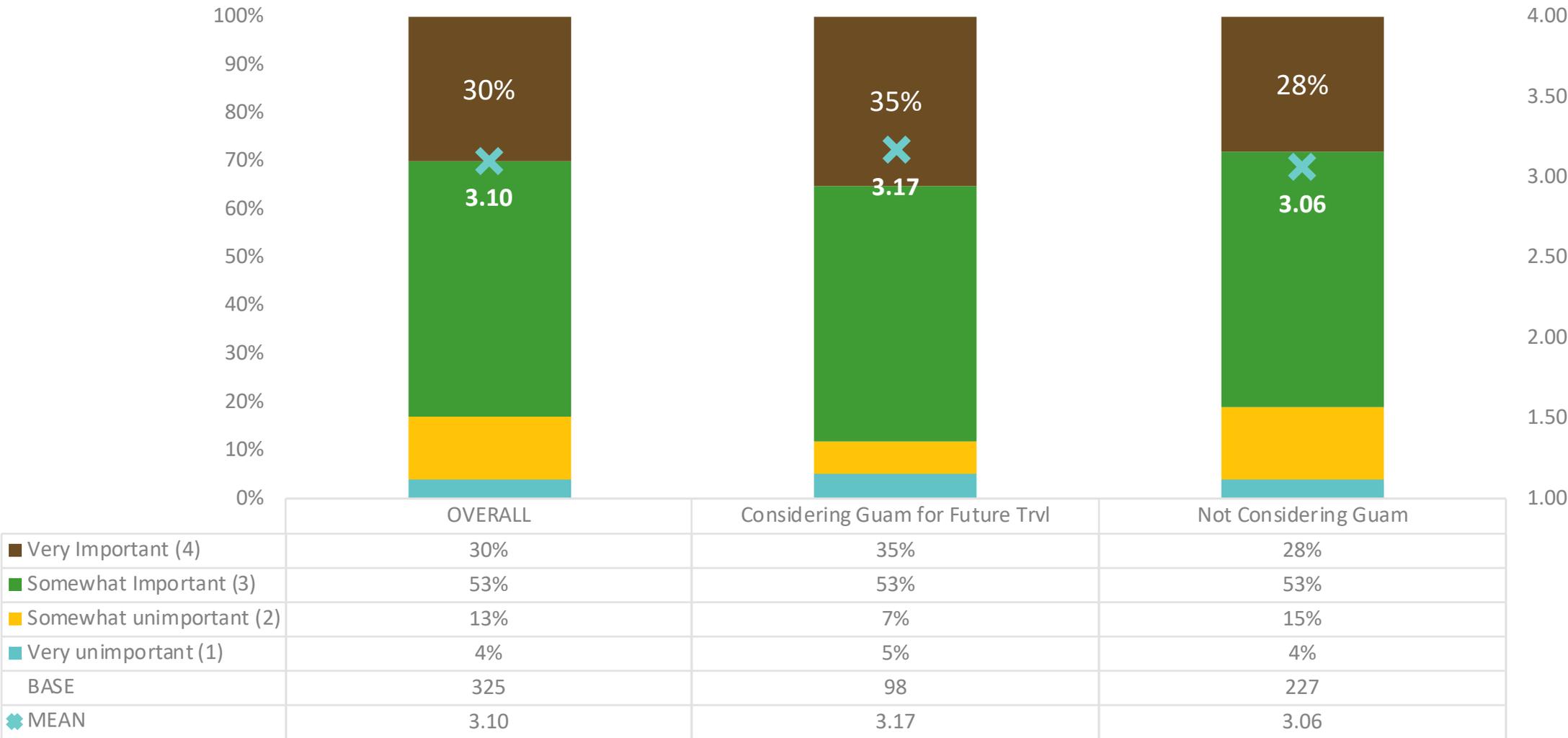
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	34%	43%	31%
Somewhat Important (3)	50%	46%	52%
Somewhat unimportant (2)	12%	10%	13%
Very unimportant (1)	3%	1%	4%
BASE	325	98	227
MEAN	3.17	3.31	3.11



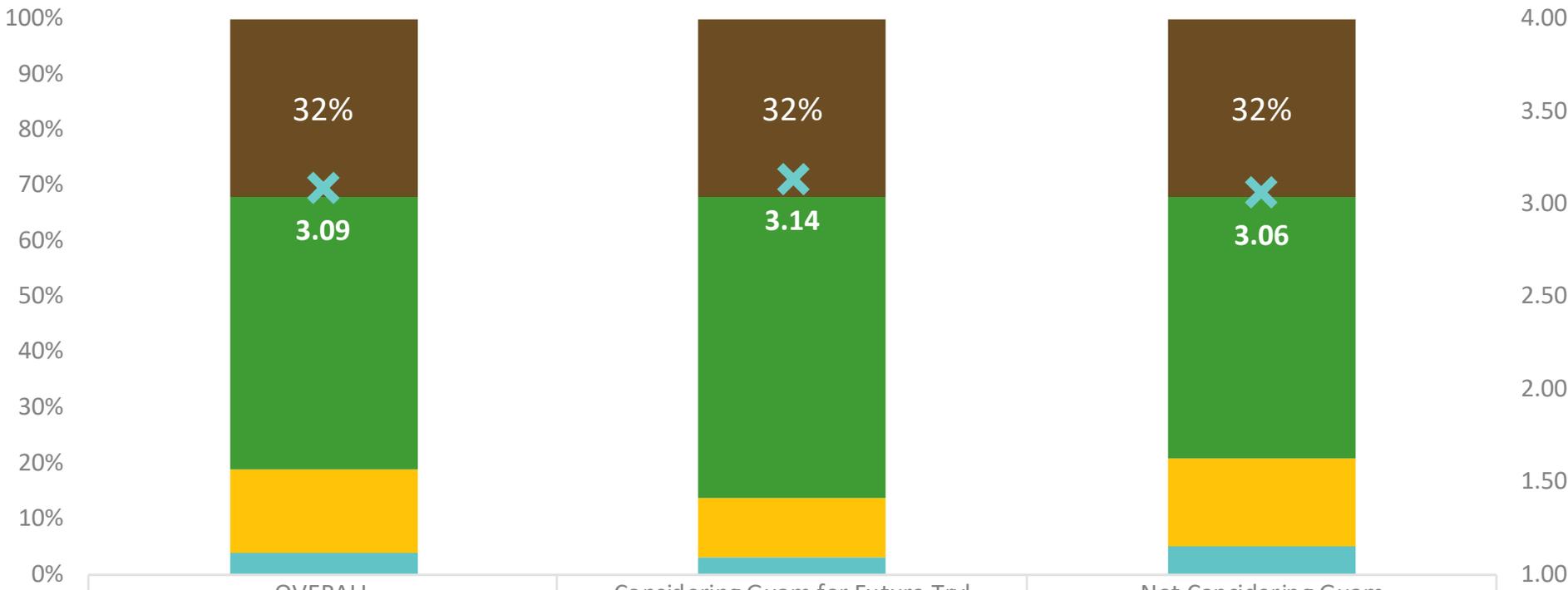
I enjoy sightseeing and tours during my vacation



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

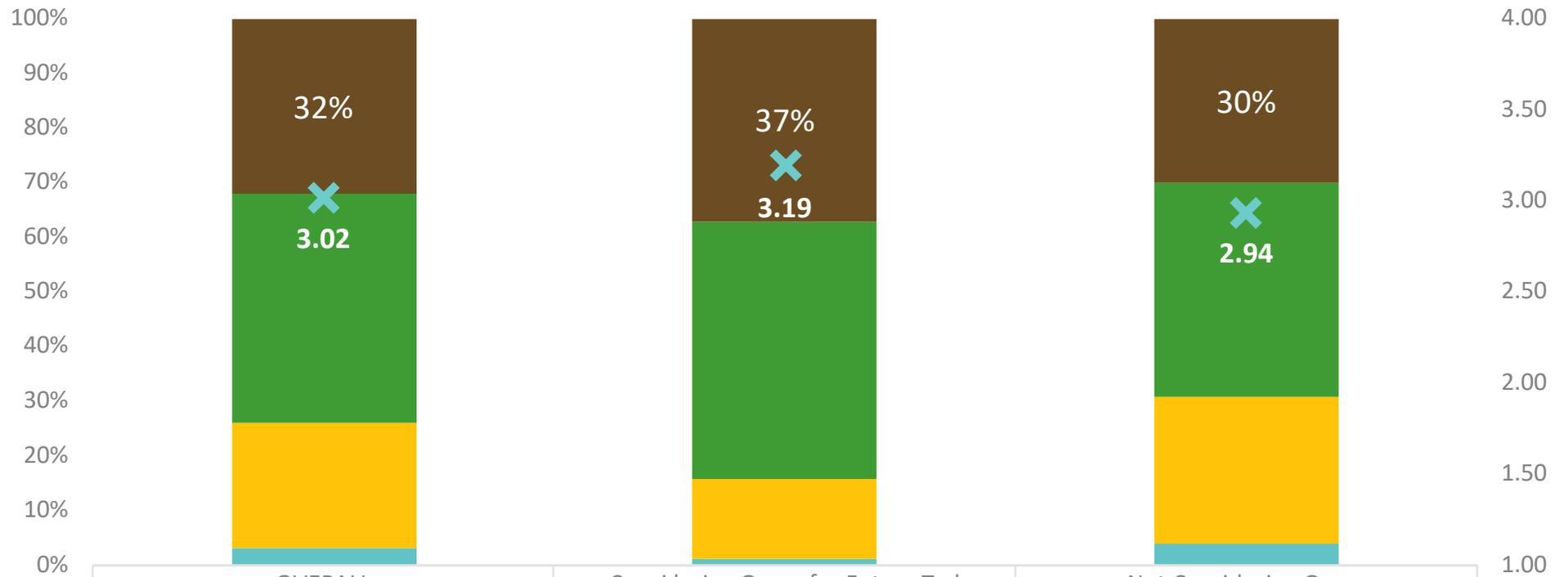


I would like to do something that I could not do in my daily life



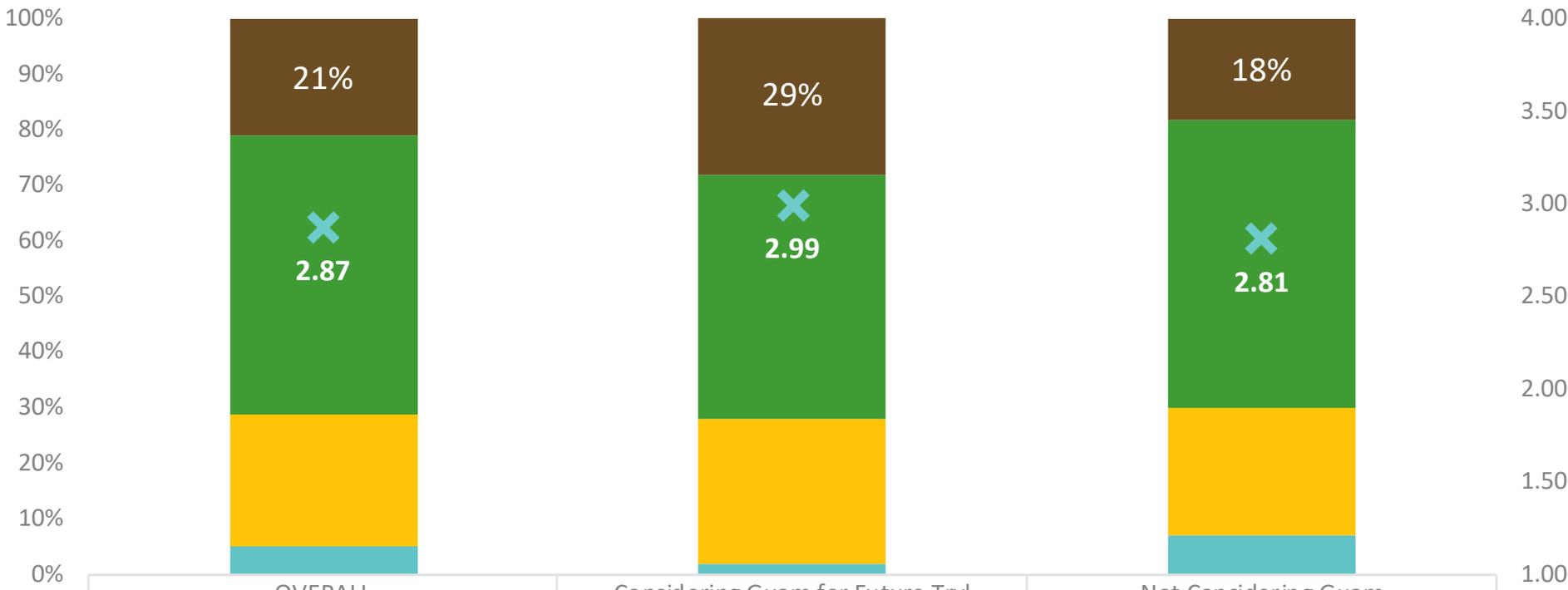
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	32%	32%	32%
Somewhat Important (3)	49%	54%	47%
Somewhat unimportant (2)	15%	11%	16%
Very unimportant (1)	4%	3%	5%
BASE	325	98	227
MEAN	3.09	3.14	3.06

I am interested in shopping



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	32%	37%	30%
Somewhat Important (3)	42%	47%	39%
Somewhat unimportant (2)	23%	15%	27%
Very unimportant (1)	3%	1%	4%
BASE	325	98	227
MEAN	3.02	3.19	2.94

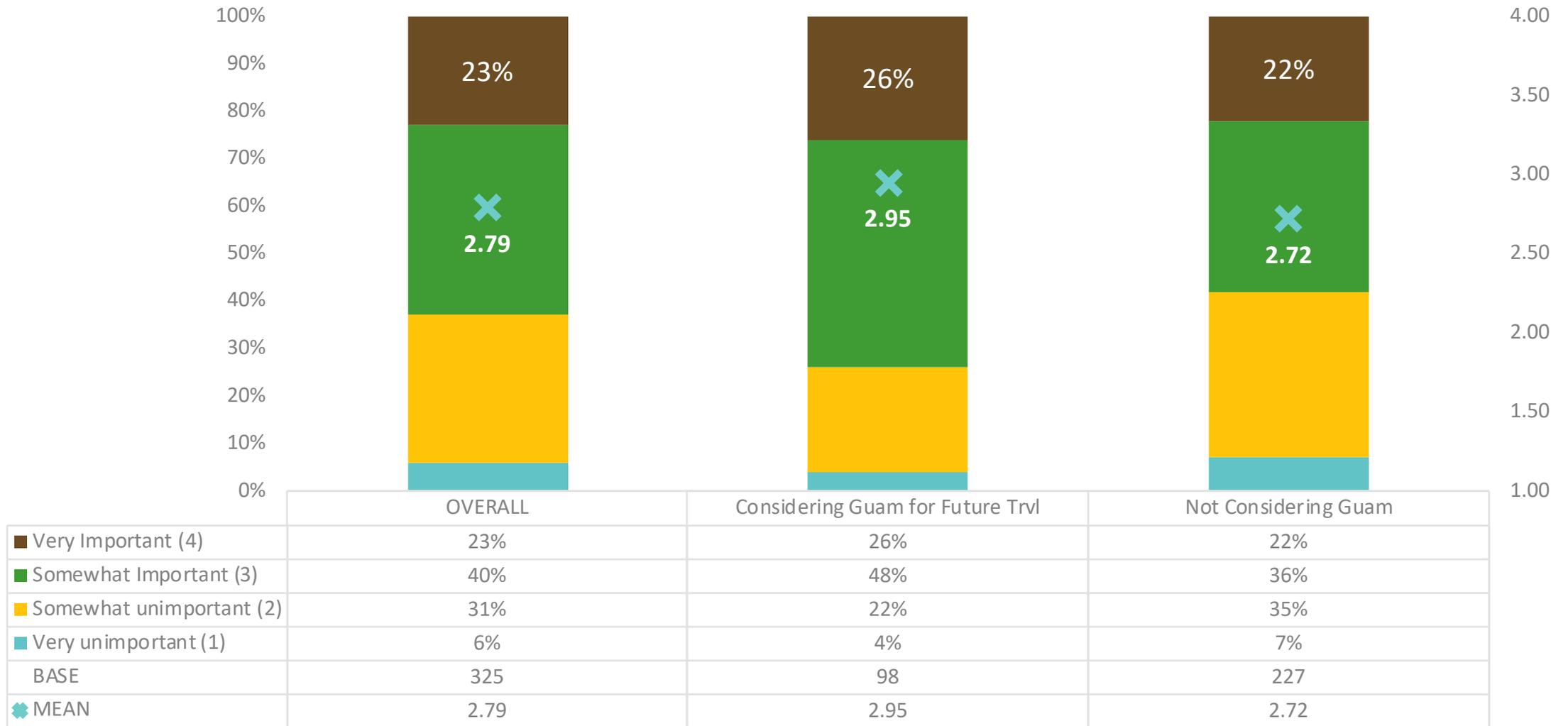
I like visiting destinations that most people value and appreciate



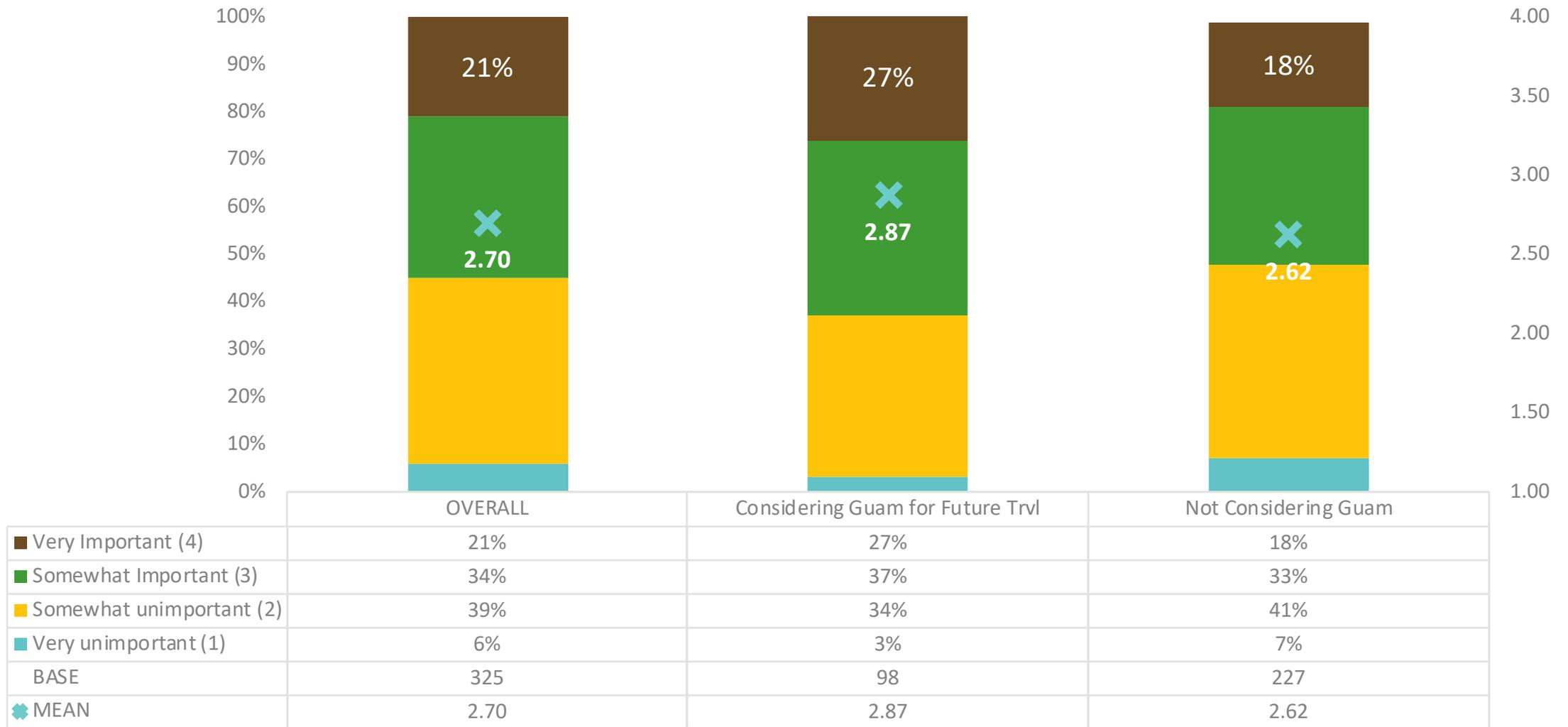
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	21%	29%	18%
Somewhat Important (3)	50%	44%	52%
Somewhat unimportant (2)	24%	26%	23%
Very unimportant (1)	5%	2%	7%
BASE	325	98	227
MEAN	2.87	2.99	2.81



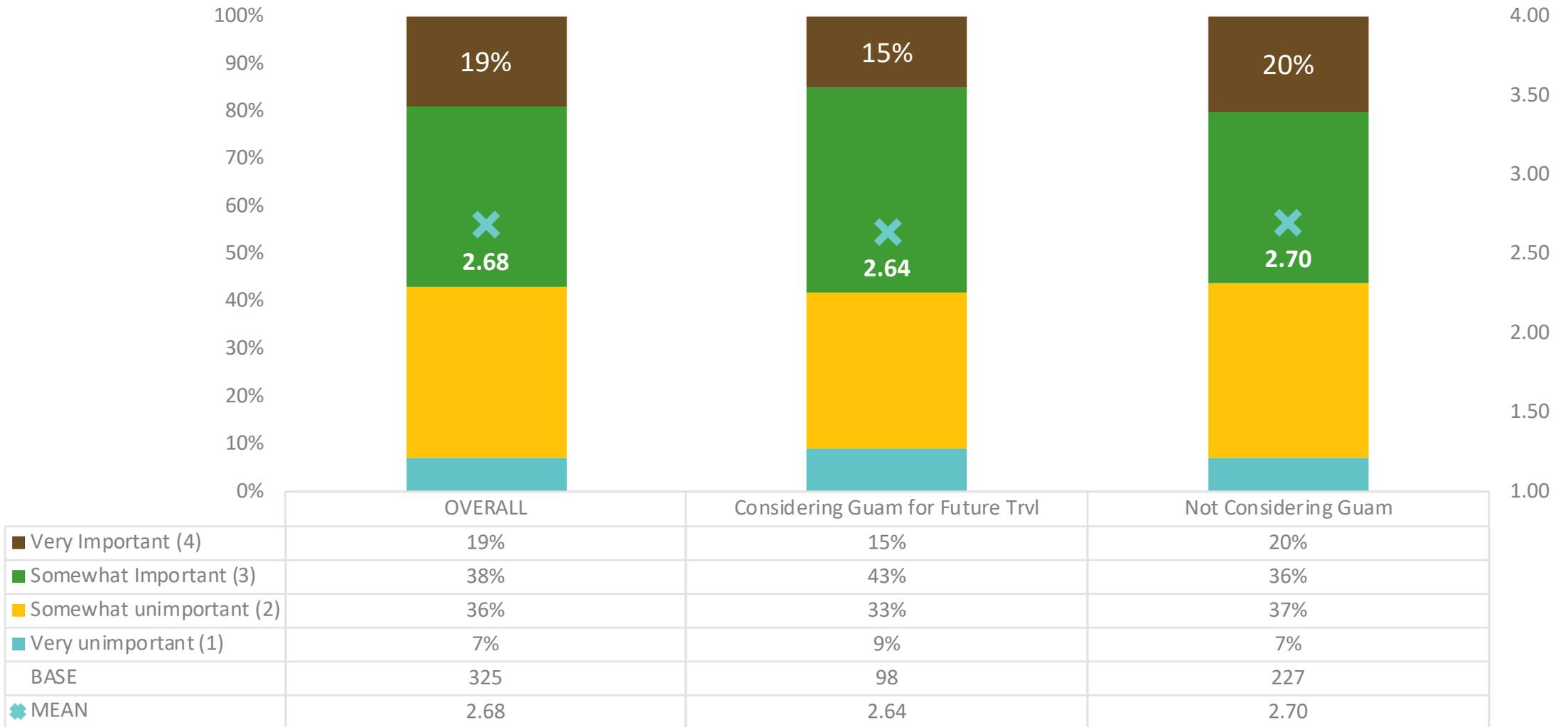
I want to take part in nature-based activities



I want to take part in activities that offer adventure



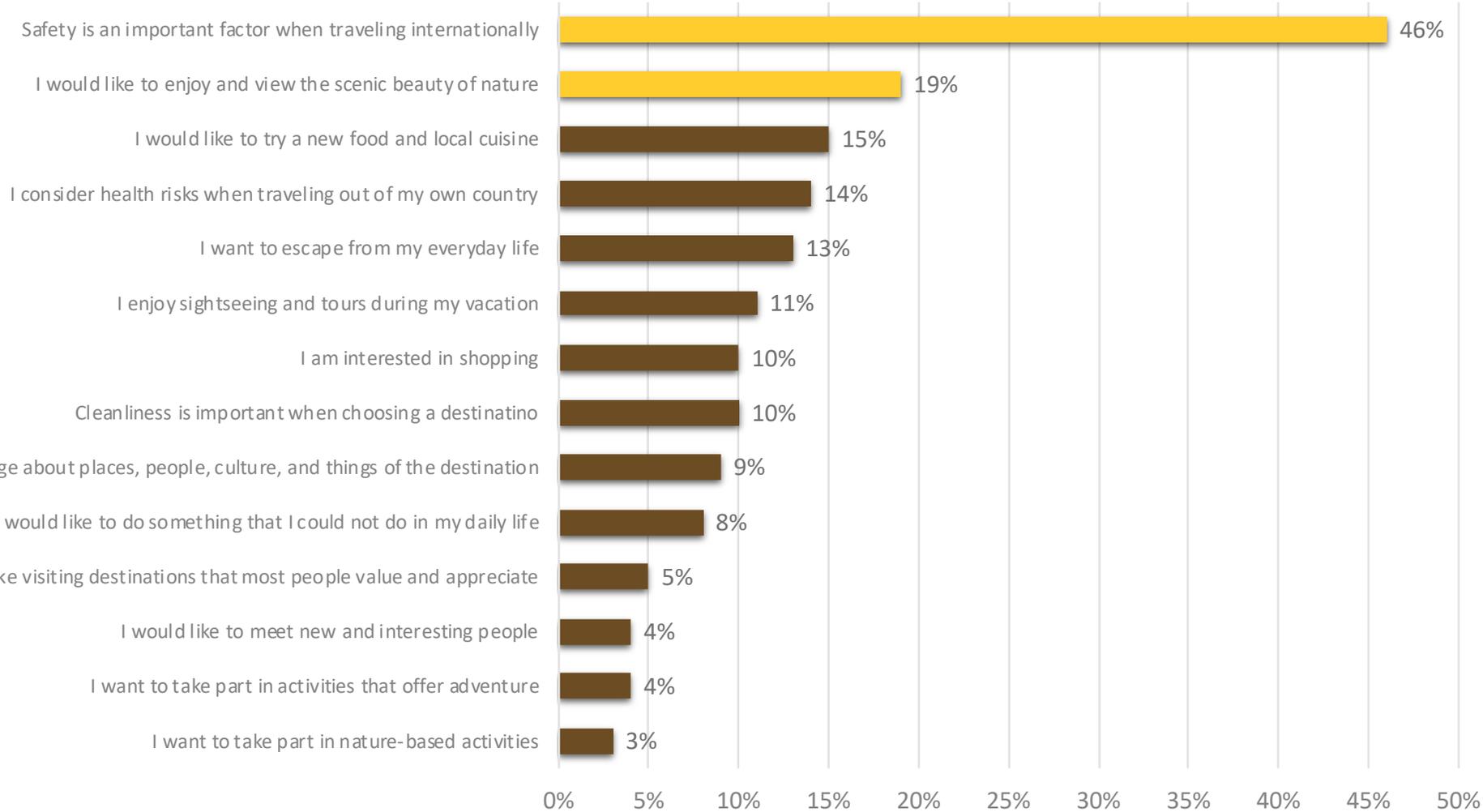
I would like to meet new and interesting people



DESTINATION SELECTION FACTORS – TOP TWO

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

Base
n=278



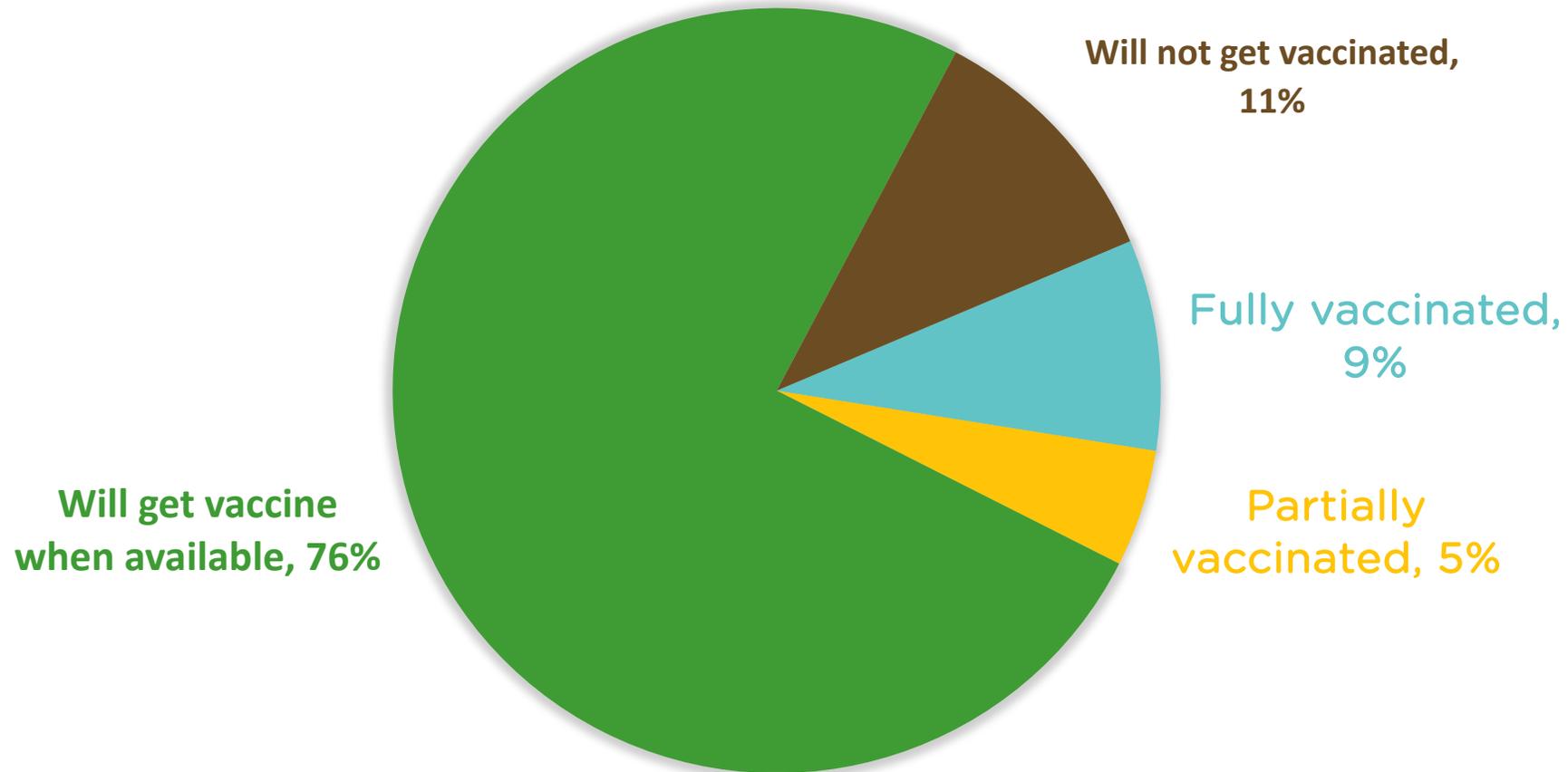


SECTION 2

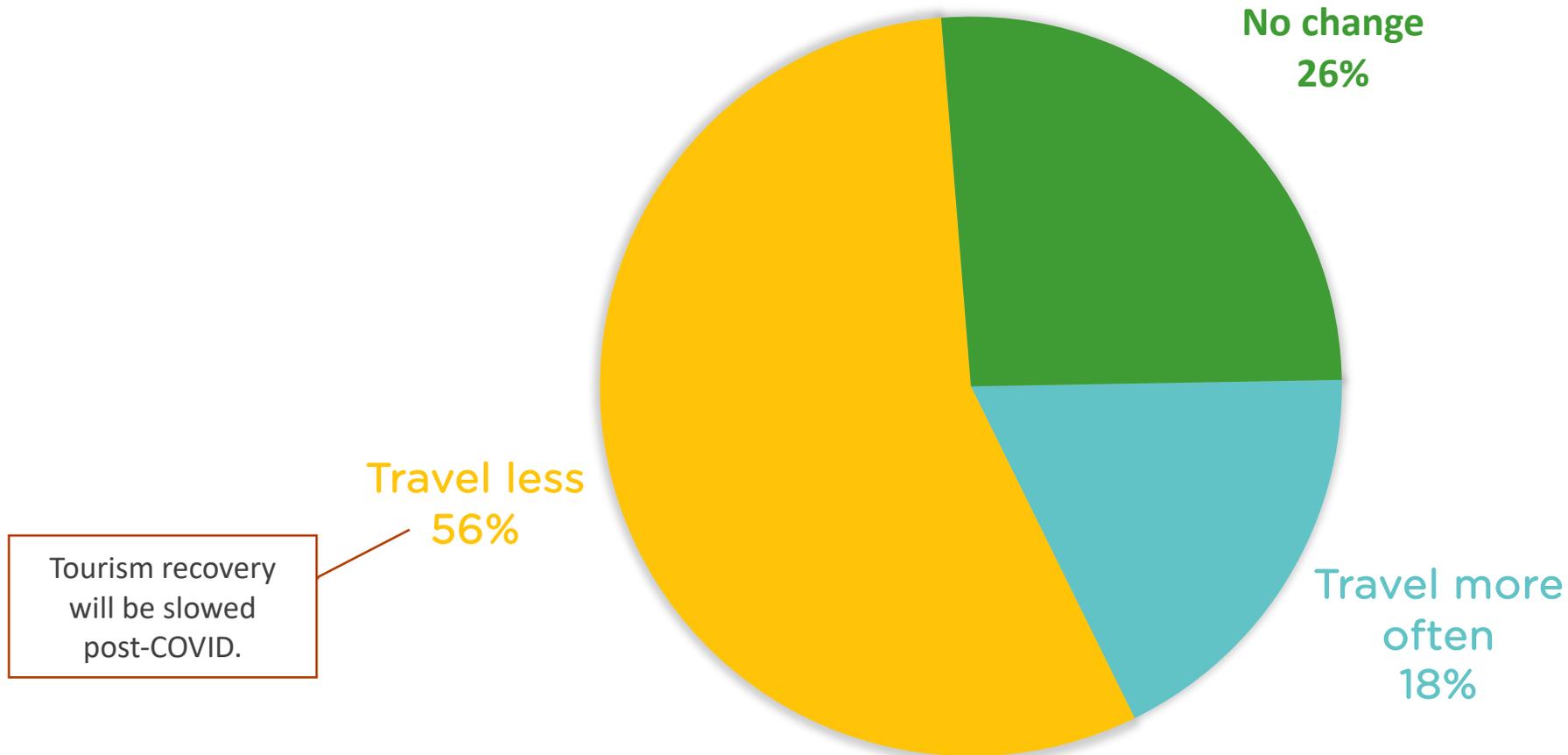
COVID-19



COVID-19 VACCINE STATUS



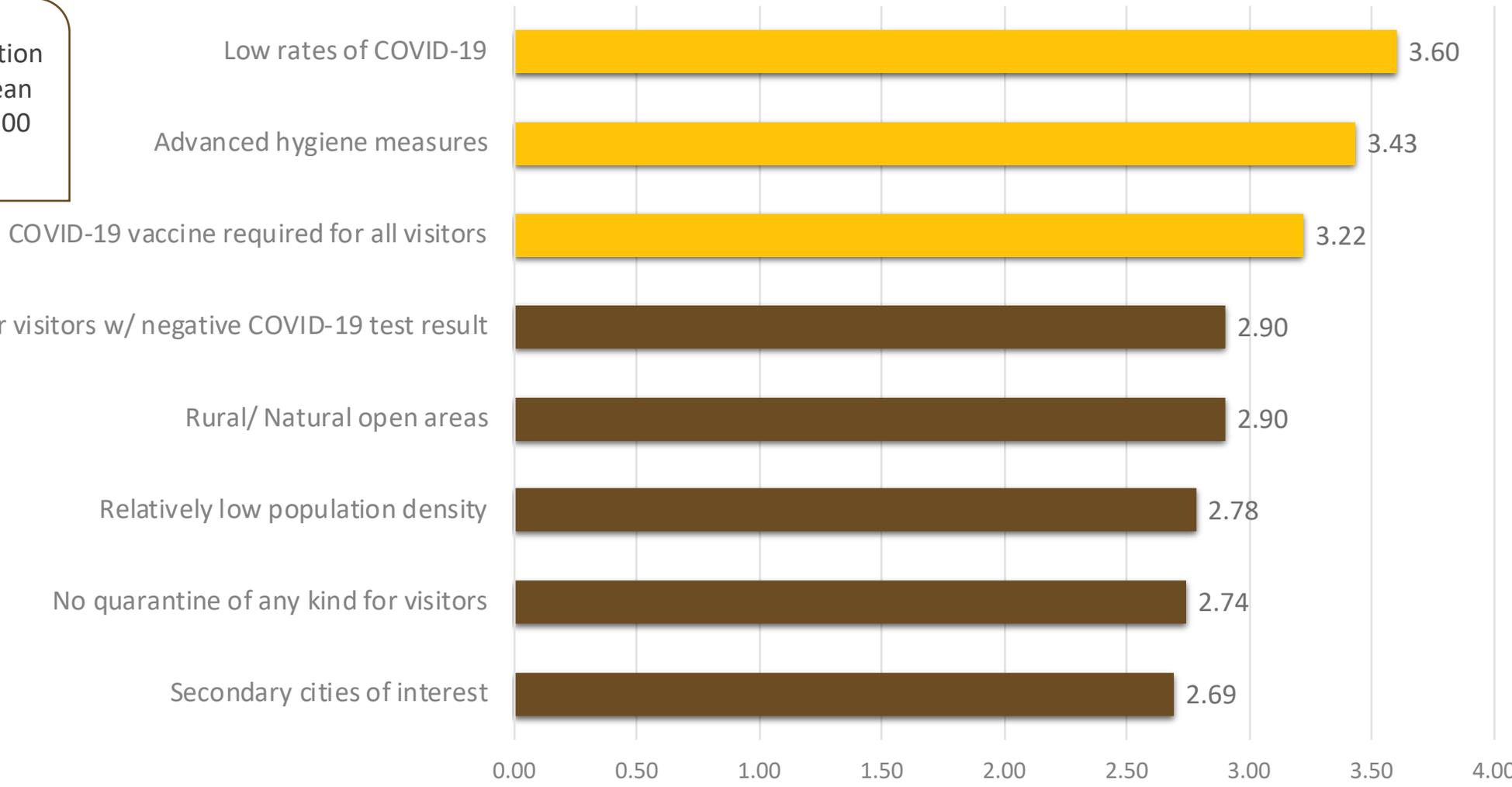
POST-COVID TRAVEL



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – MEAN SCORE

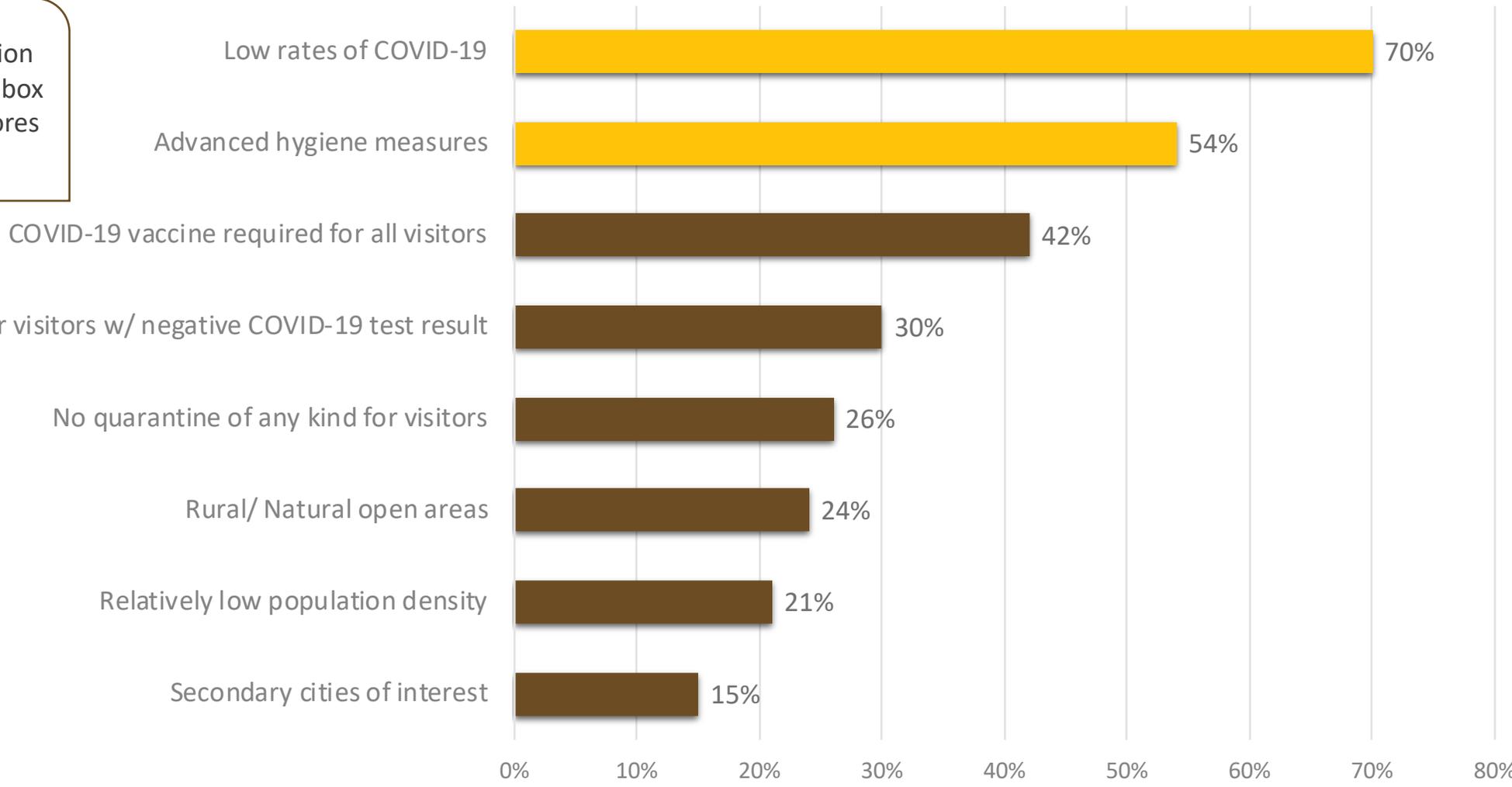
Three (yellow) selection factors received mean scores above the 3.00 threshold.



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – TOP BOX (VERY IMPORTANT)

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

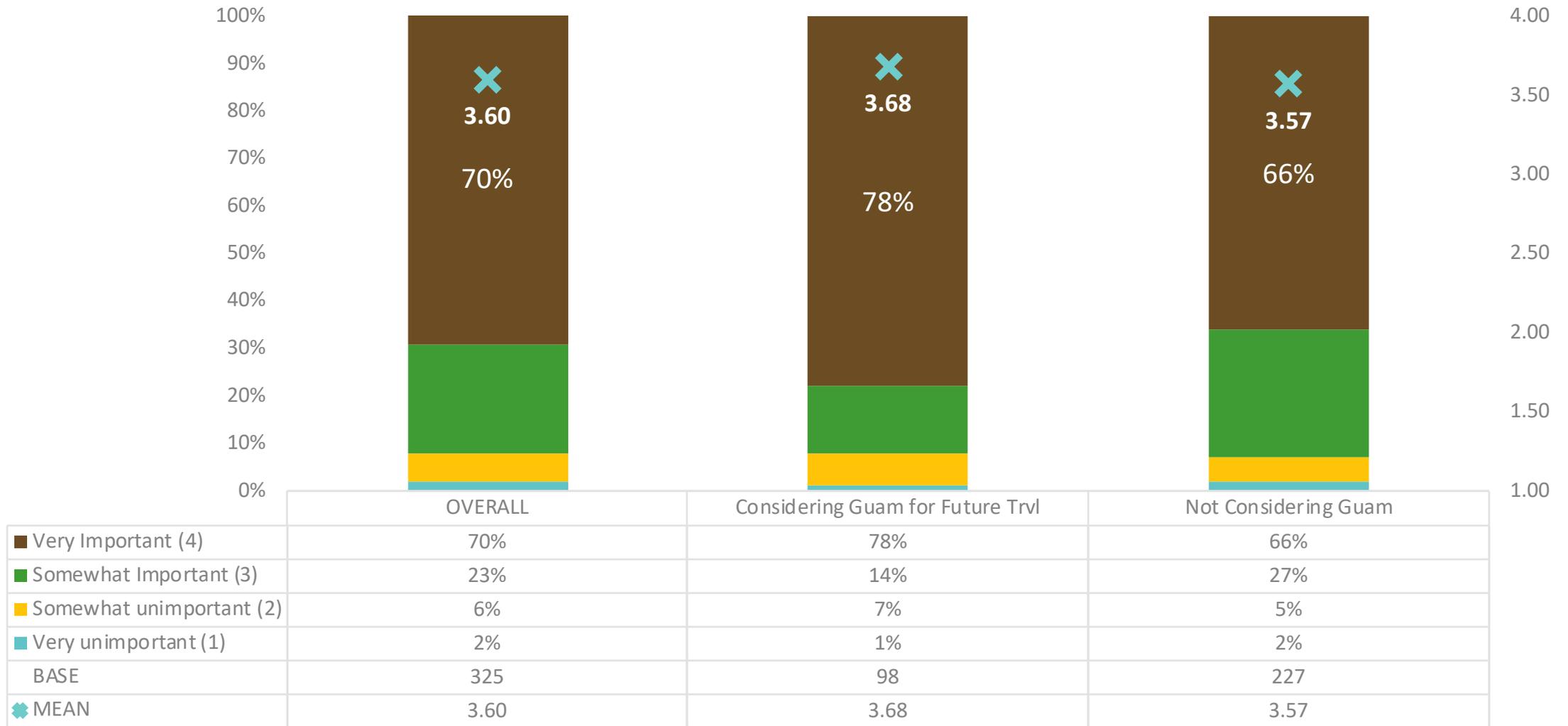


Q: When considering an international destination for travel post-COVID-19, how important are each of the following to you in selecting a destination to visit?



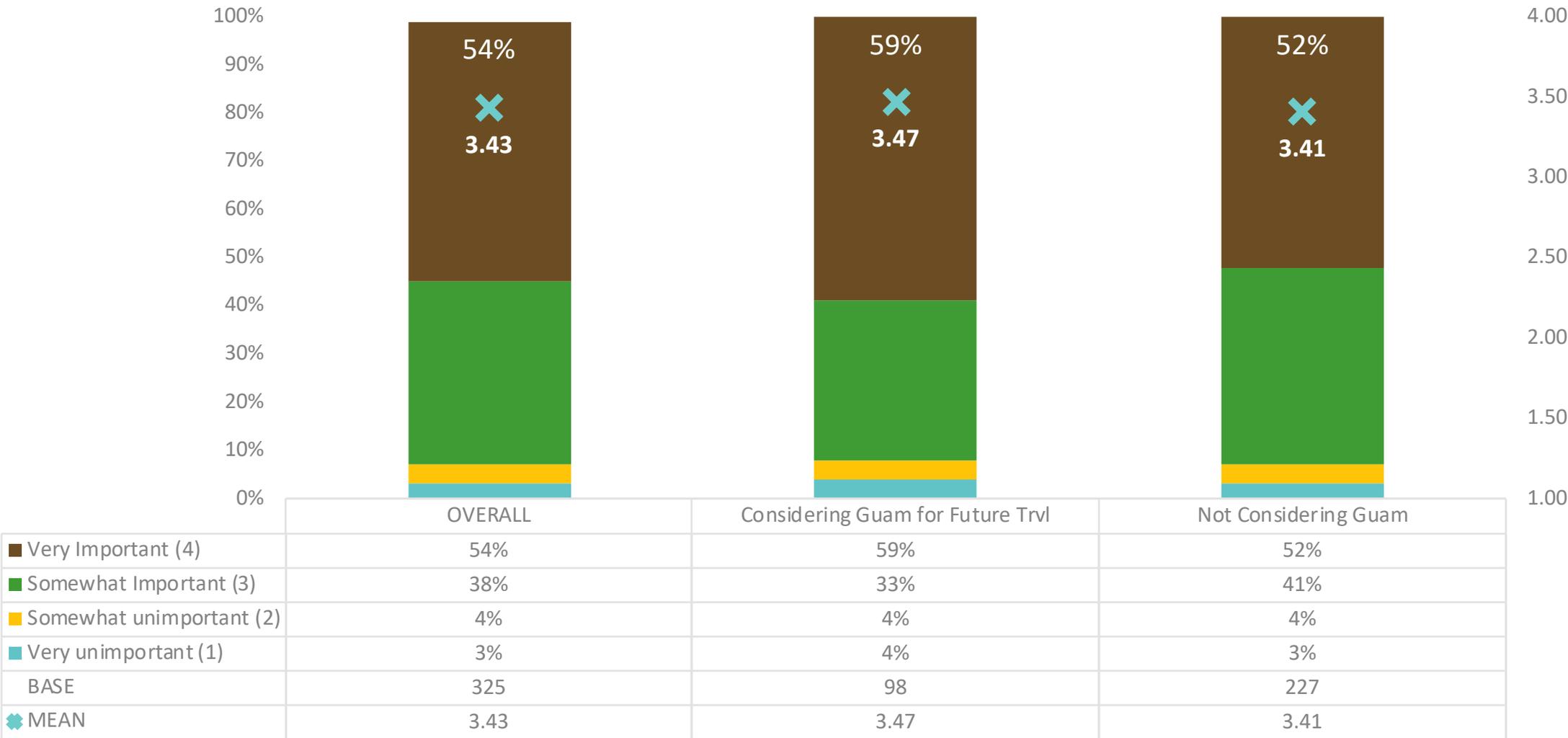
POST-COVID SELECTION FACTOR

Low rates of COVID-19



POST-COVID SELECTION FACTOR

Advanced hygiene measures

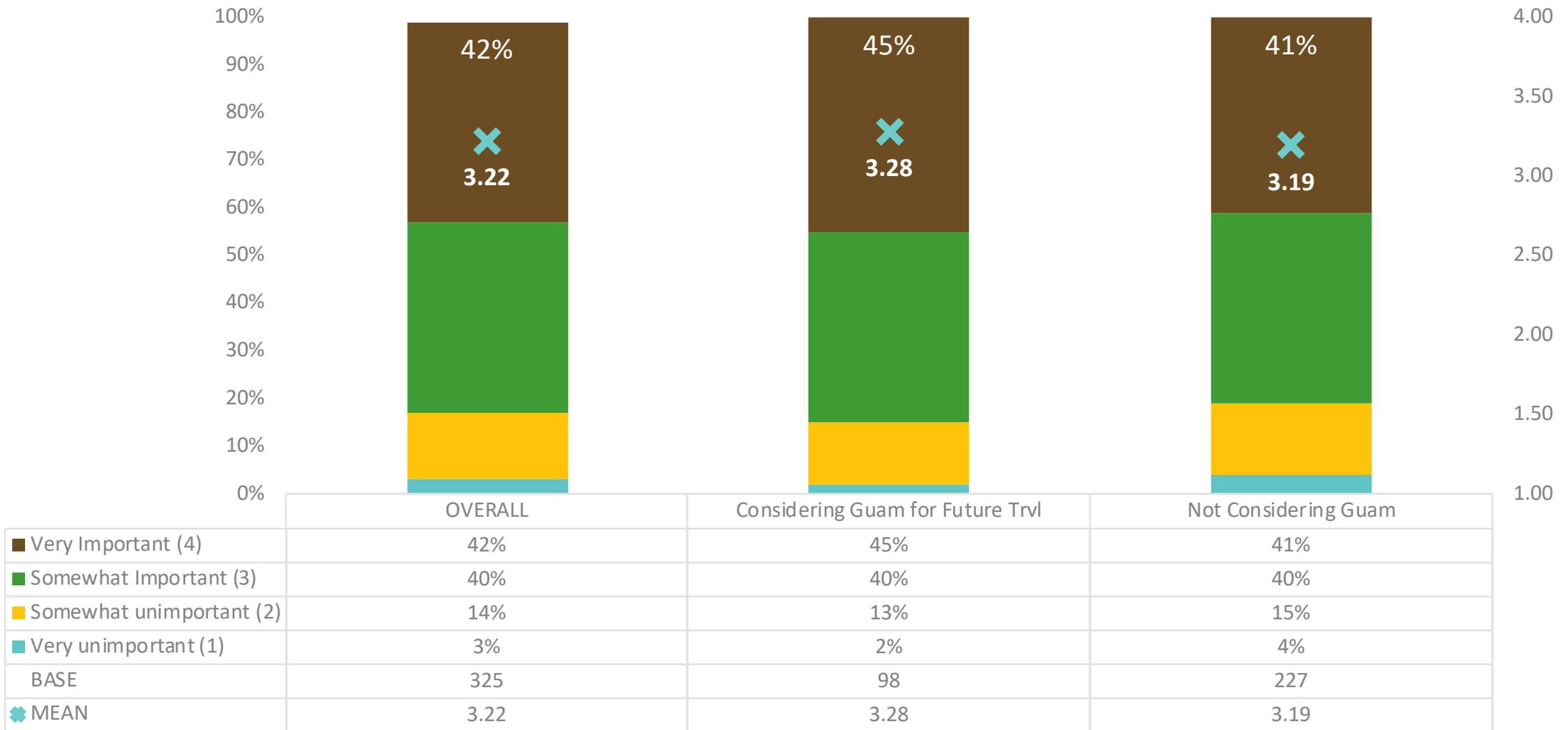


Q: When considering an international destination for travel post-COVID-19, how important are each of the following To you in selecting a destination to visit?



POST-COVID SELECTION FACTOR

COVID-19 vaccine required for all visitors



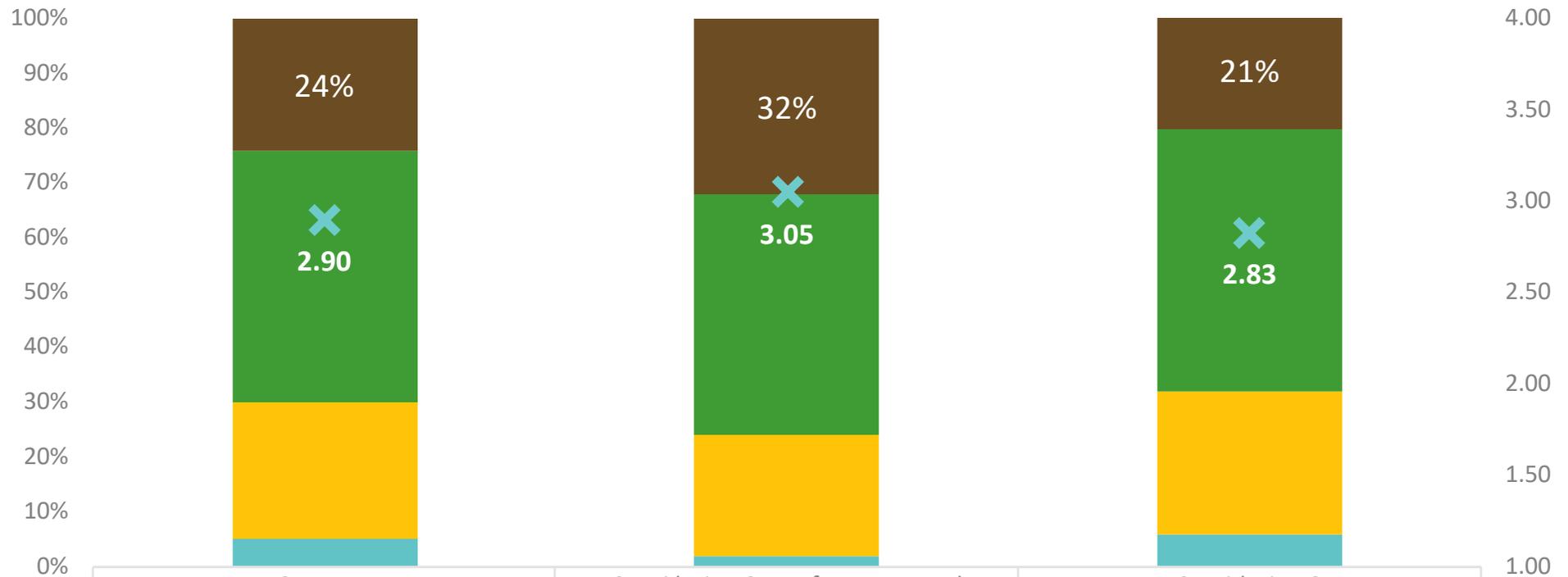
POST-COVID SELECTION FACTOR

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



POST-COVID SELECTION FACTOR

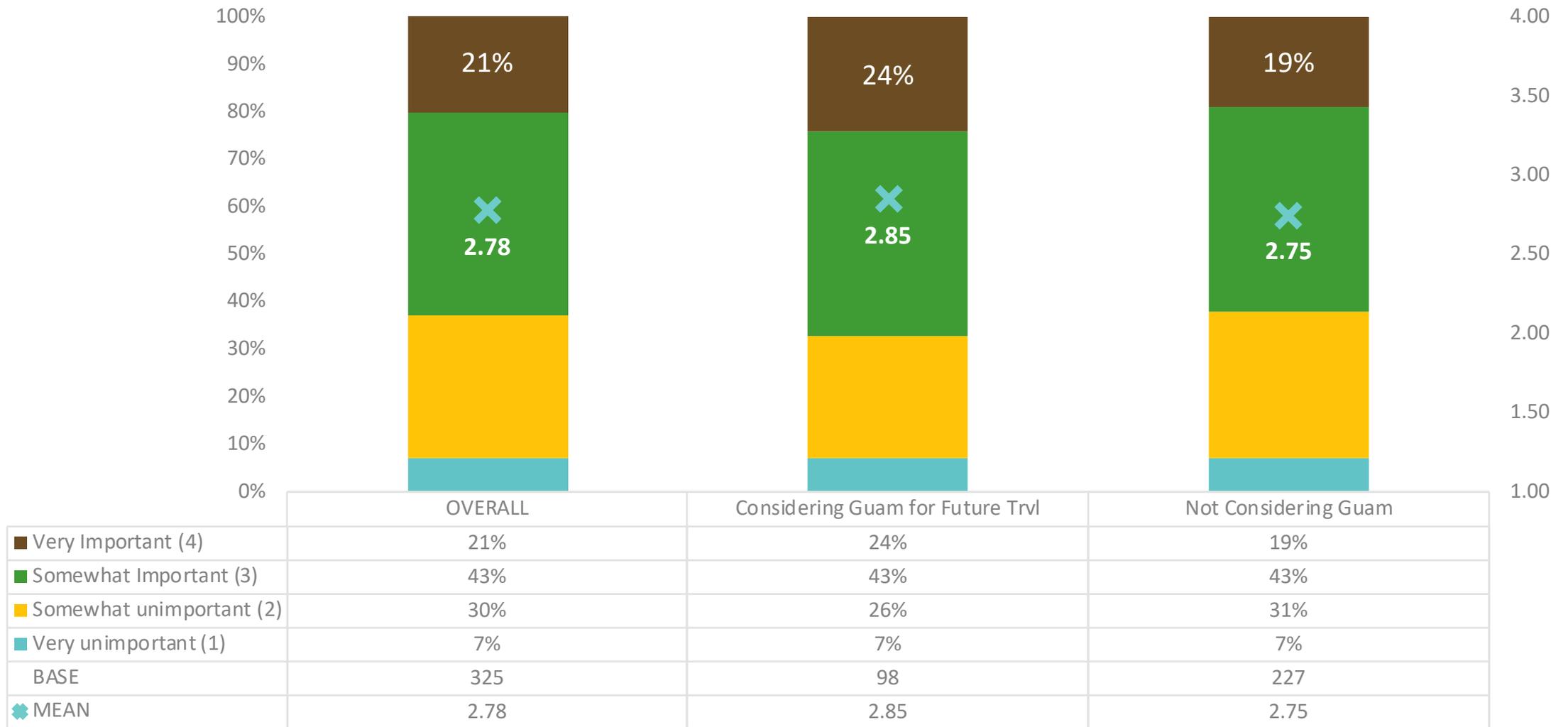
Rural/ natural open areas



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	24%	32%	21%
Somewhat Important (3)	46%	44%	48%
Somewhat unimportant (2)	25%	22%	26%
Very unimportant (1)	5%	2%	6%
BASE	325	98	227
MEAN	2.90	3.05	2.83

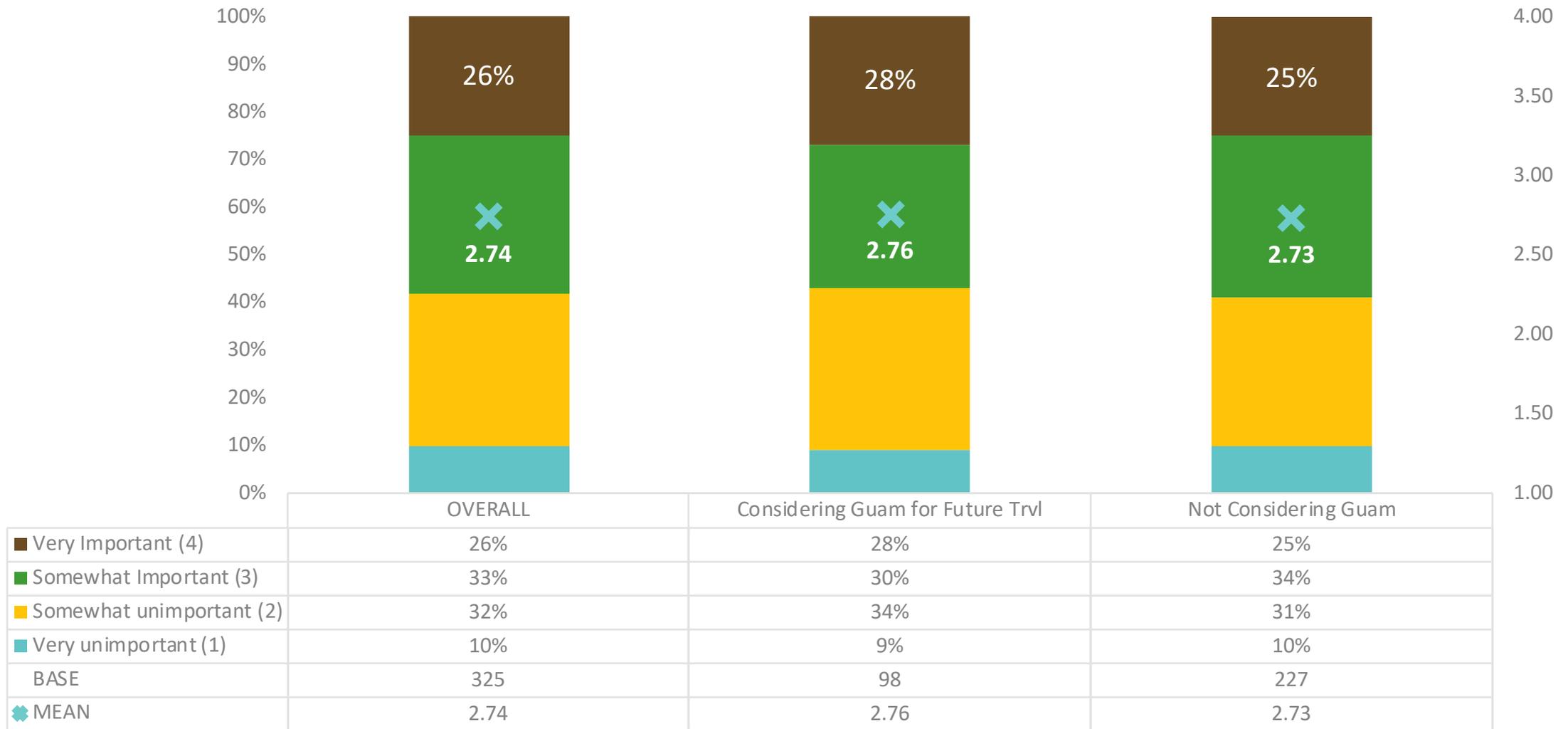
POST-COVID SELECTION FACTOR

Relatively low population density



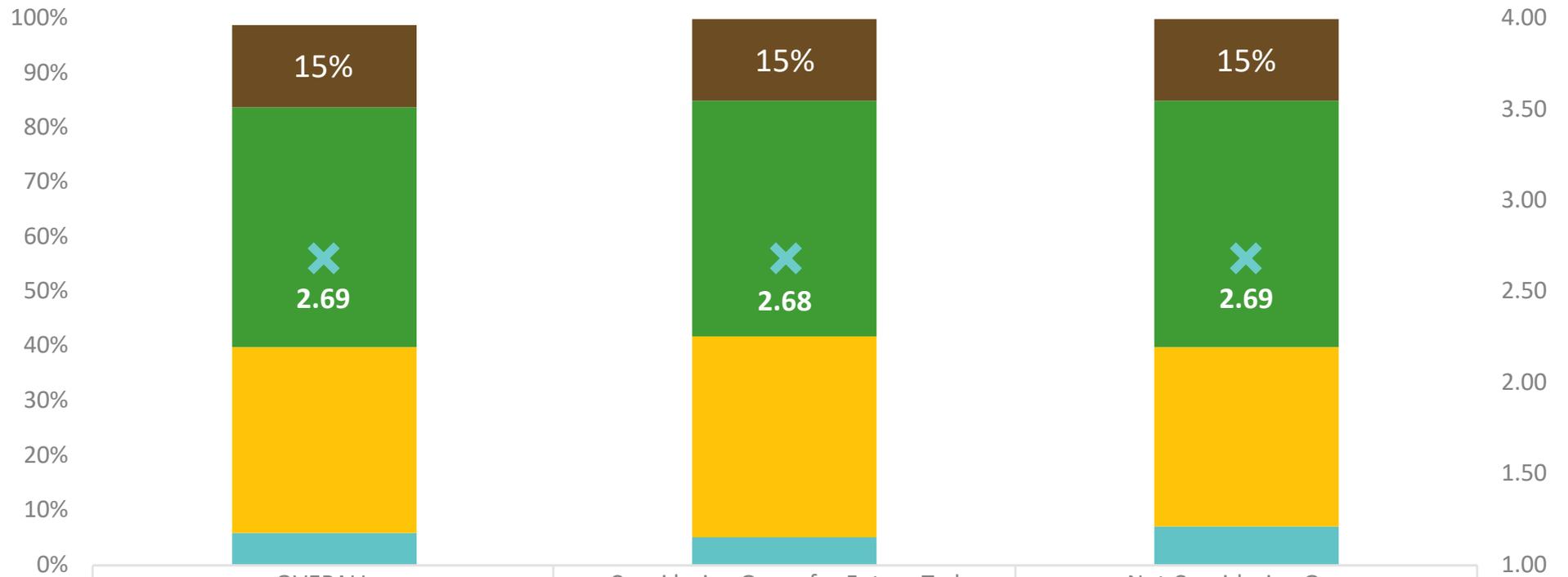
POST-COVID SELECTION FACTOR

No quarantine of any kind for visitors



POST-COVID SELECTION FACTOR

Secondary cities of interest



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	15%	15%	15%
Somewhat Important (3)	44%	43%	45%
Somewhat unimportant (2)	34%	37%	33%
Very unimportant (1)	6%	5%	7%
BASE	325	98	227
MEAN	2.69	2.68	2.69

GUAM AIRPORT COVID-19 SAFETY MEASURES

I see these improvements as added value and am willing to pay a little more for them
61%

Majority appear to be okay with a fee that results in increased COVID safety measures.

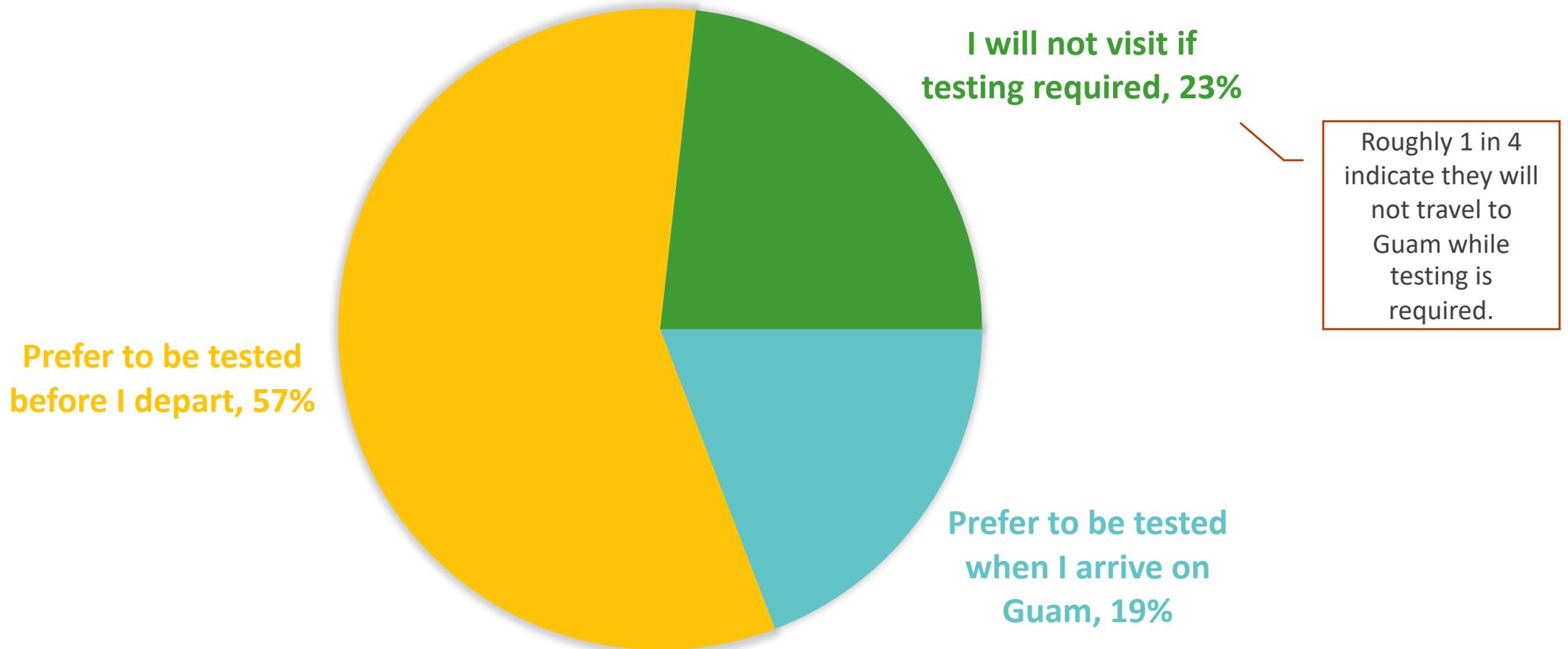


I am looking for a budget travel package and I am willing to forego these added benefits
39%

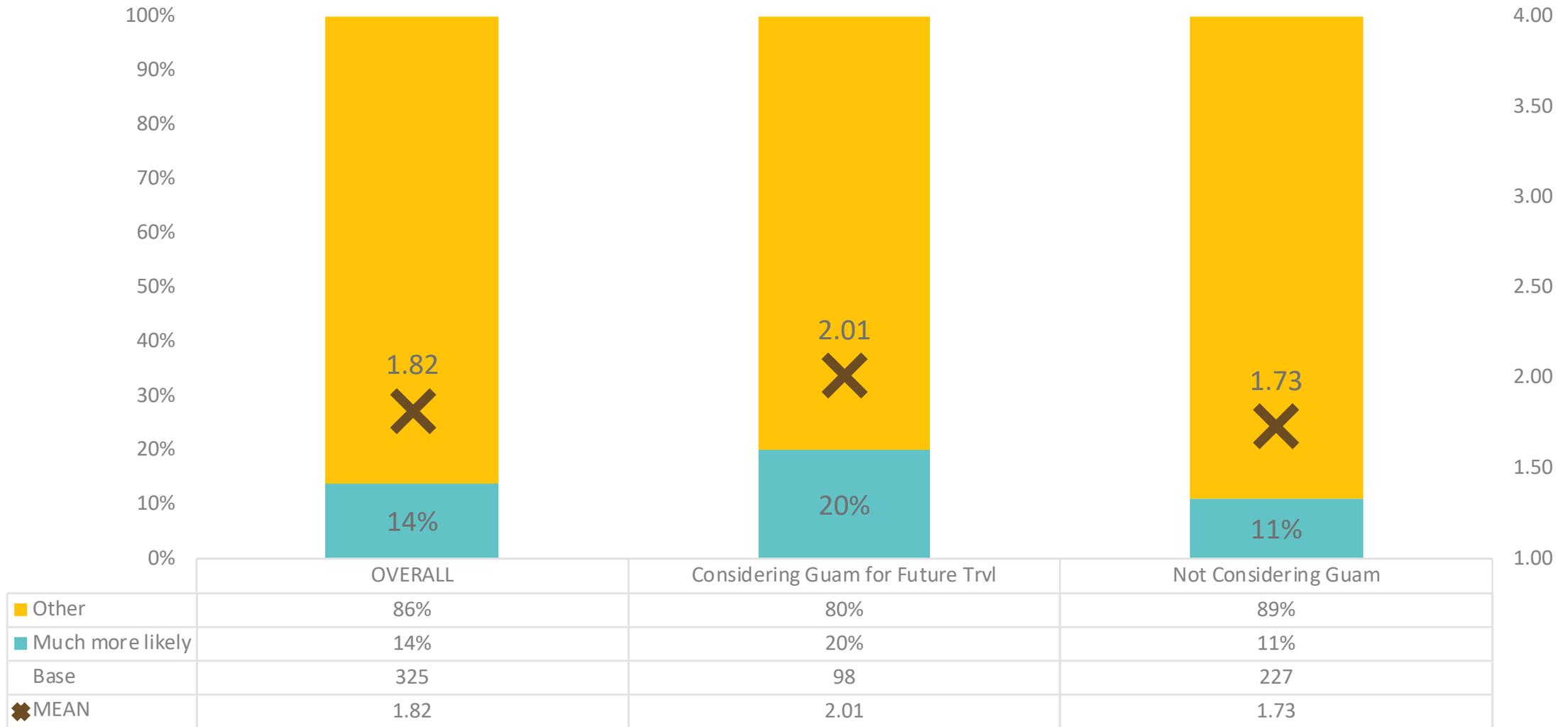
Q: In light of the COVID-19 pandemic, Guam has plans to implement numerous safety measures at the airport, including Digital/ touchless experience using kiosks and QR codes for the customers and border protection/ ESTA process. Which of the following best describes your reaction to these improvements?



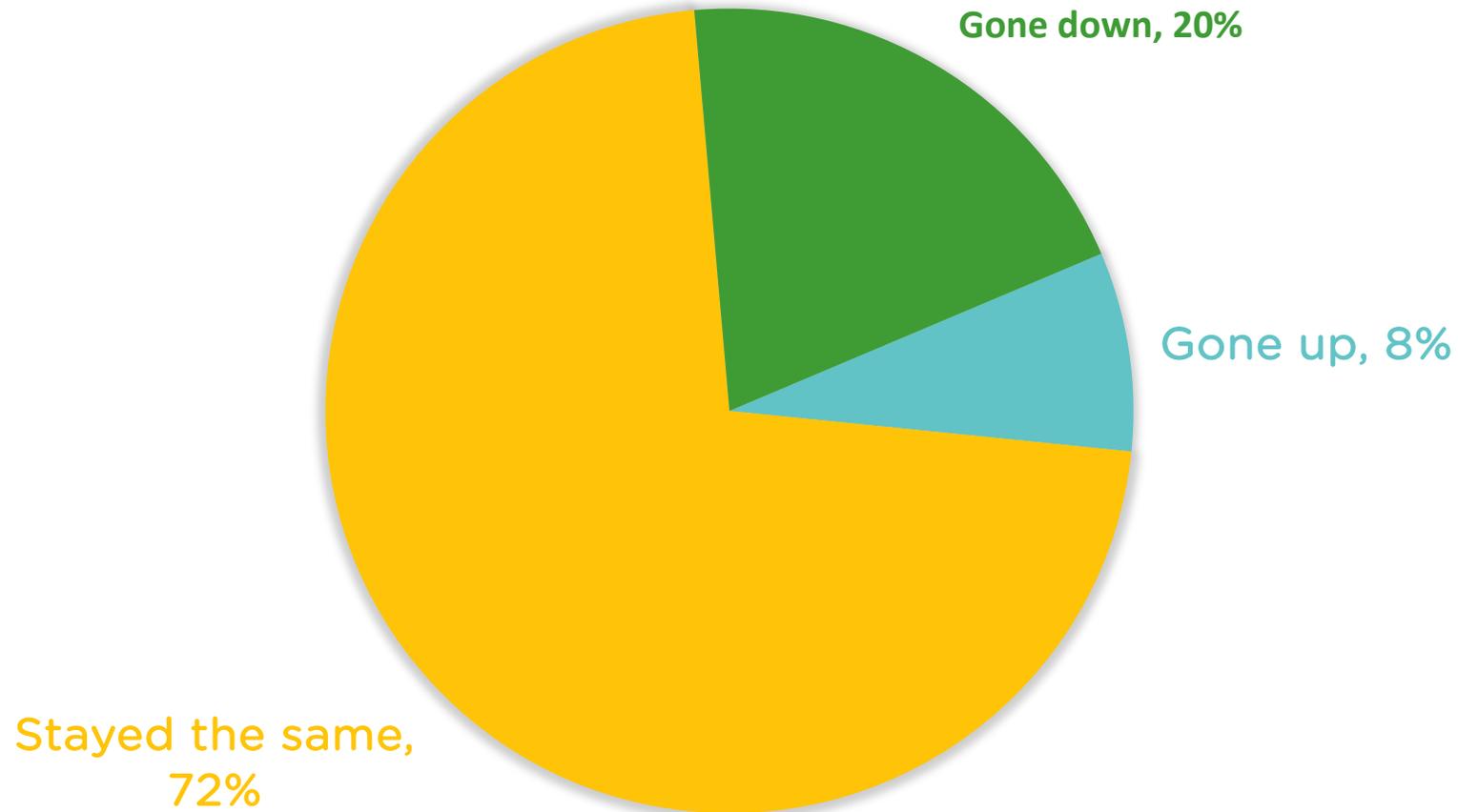
ON-ISLE COVID-19 TESTING PREFERENCE



IMPACT ON TRAVEL – FDA APPROVED COVID TEST



CHANGES IN HOUSEHOLD INCOME DURING PANDEMIC



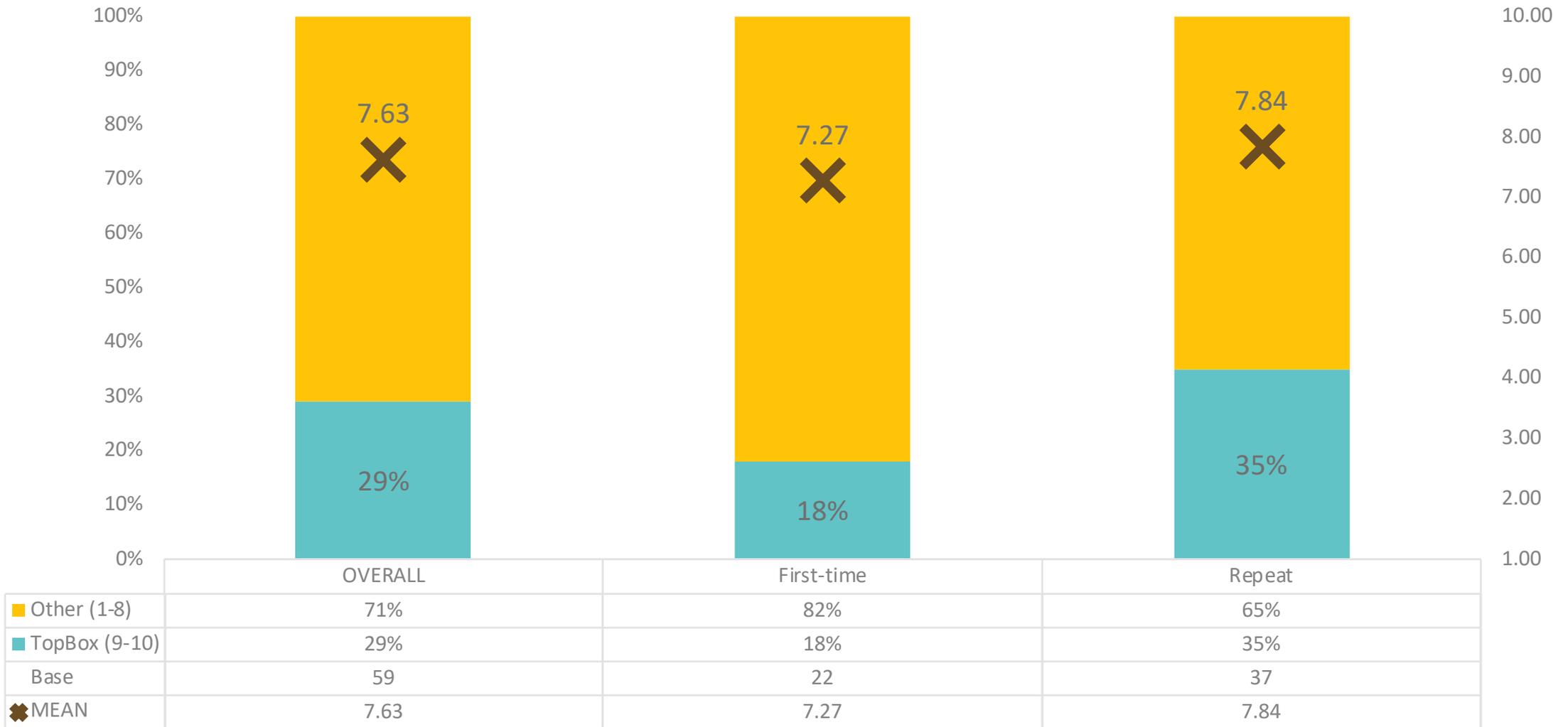


SECTION 3

VISITOR SATISFACTION

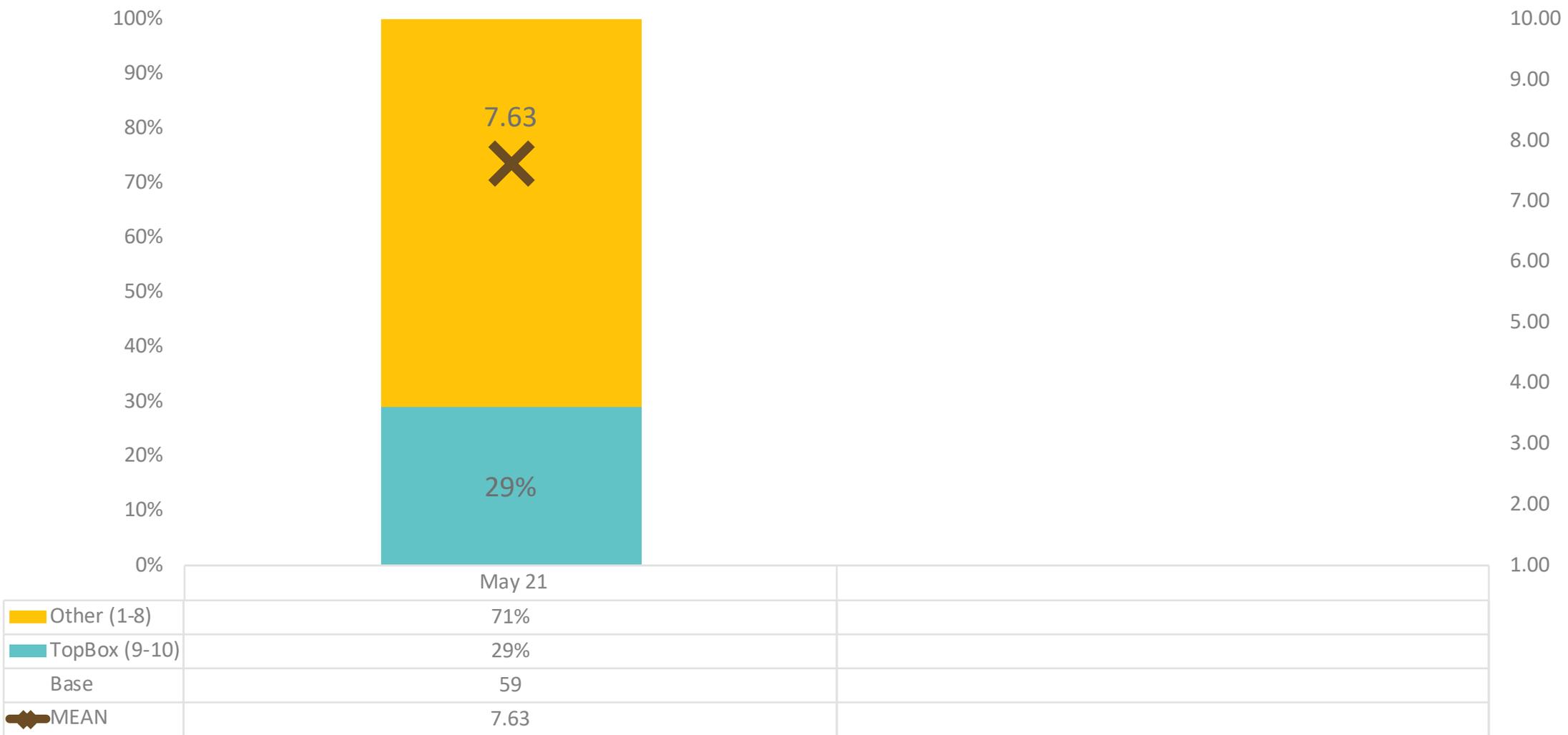


OVERALL SATISFACTION – 10PT SCALE

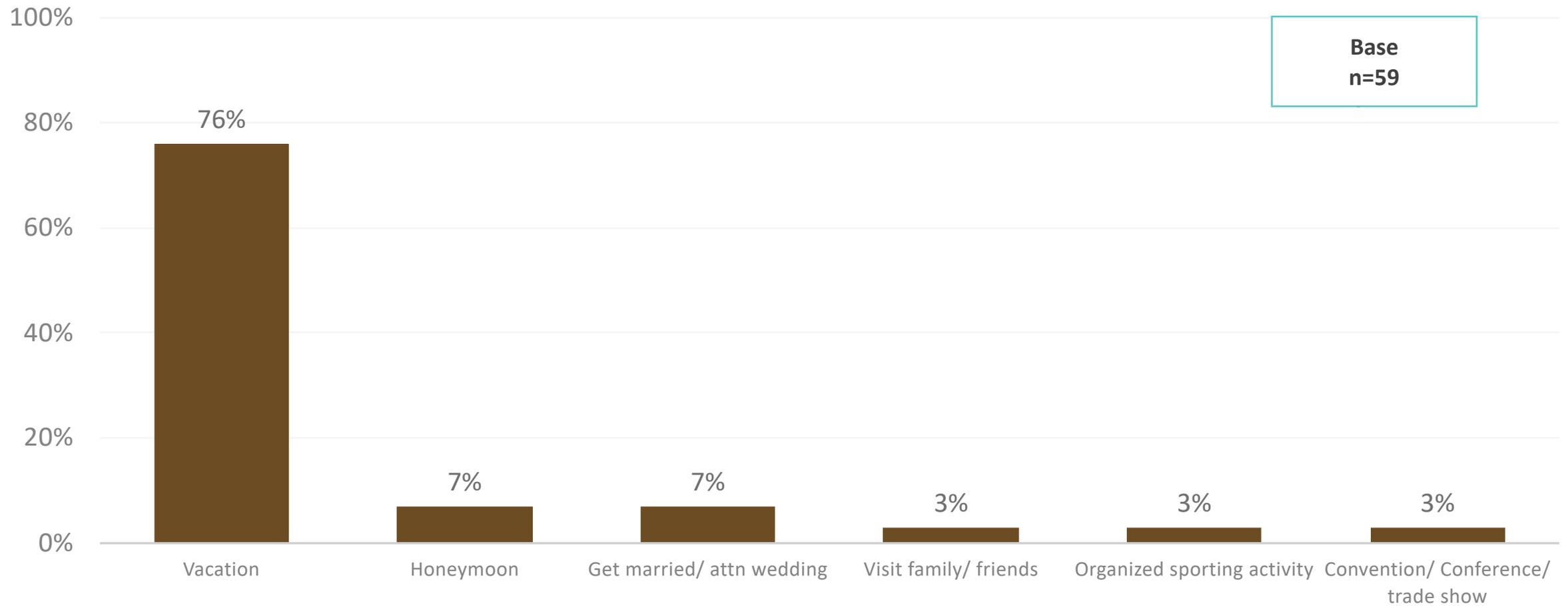


OVERALL SATISFACTION – 10PT SCALE

Tracking



PRIMARY TRAVEL MOTIVATION



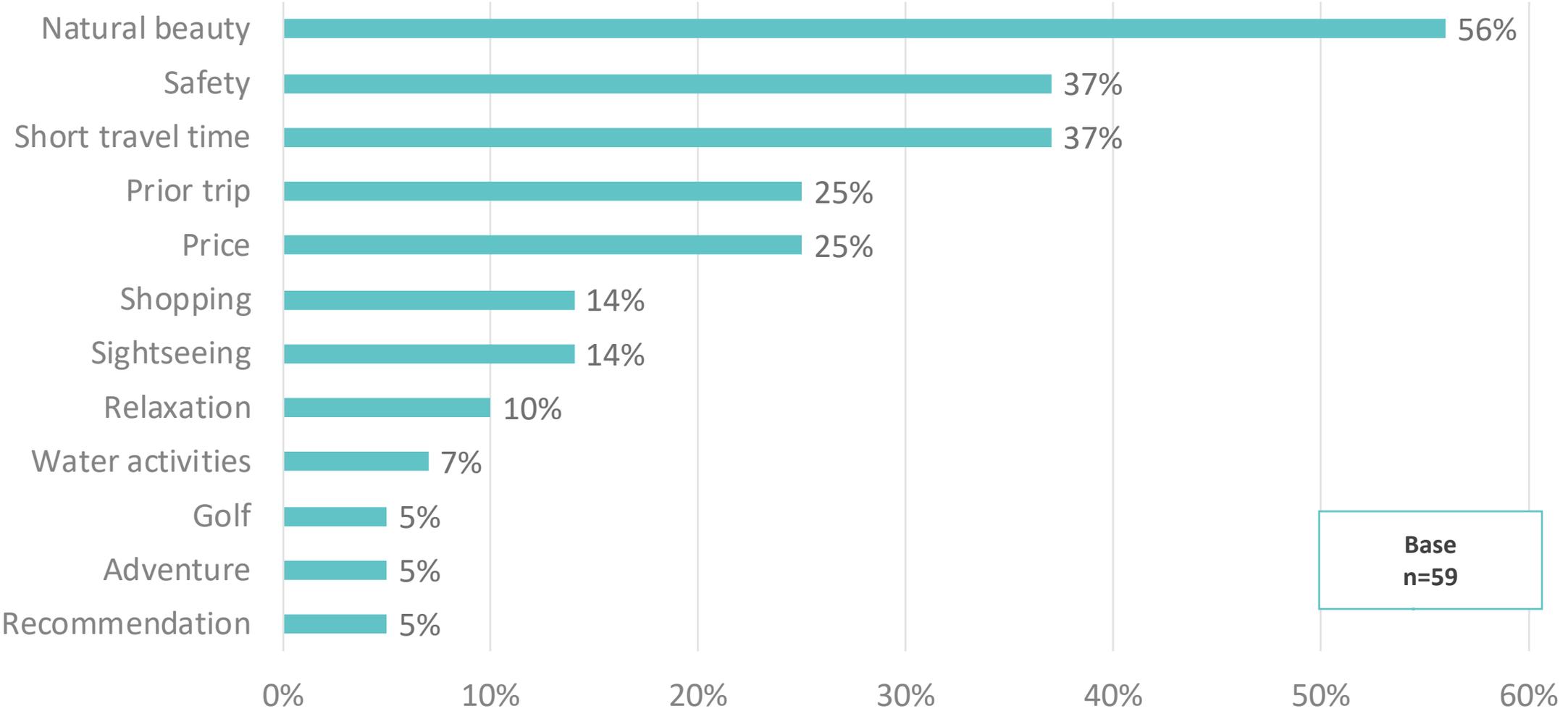
PRIMARY TRAVEL MOTIVATION

Tracking

	May 21
BASE	59
Pleasure/ Vacation	76%
Get married/ attend wedding	7%
Honeymoon	7%
Organized sporting activity	3%
Visit family/friends	3%
Business convention/ conference/ trade show	3%



TRAVEL MOTIVATIONS – TOP 3

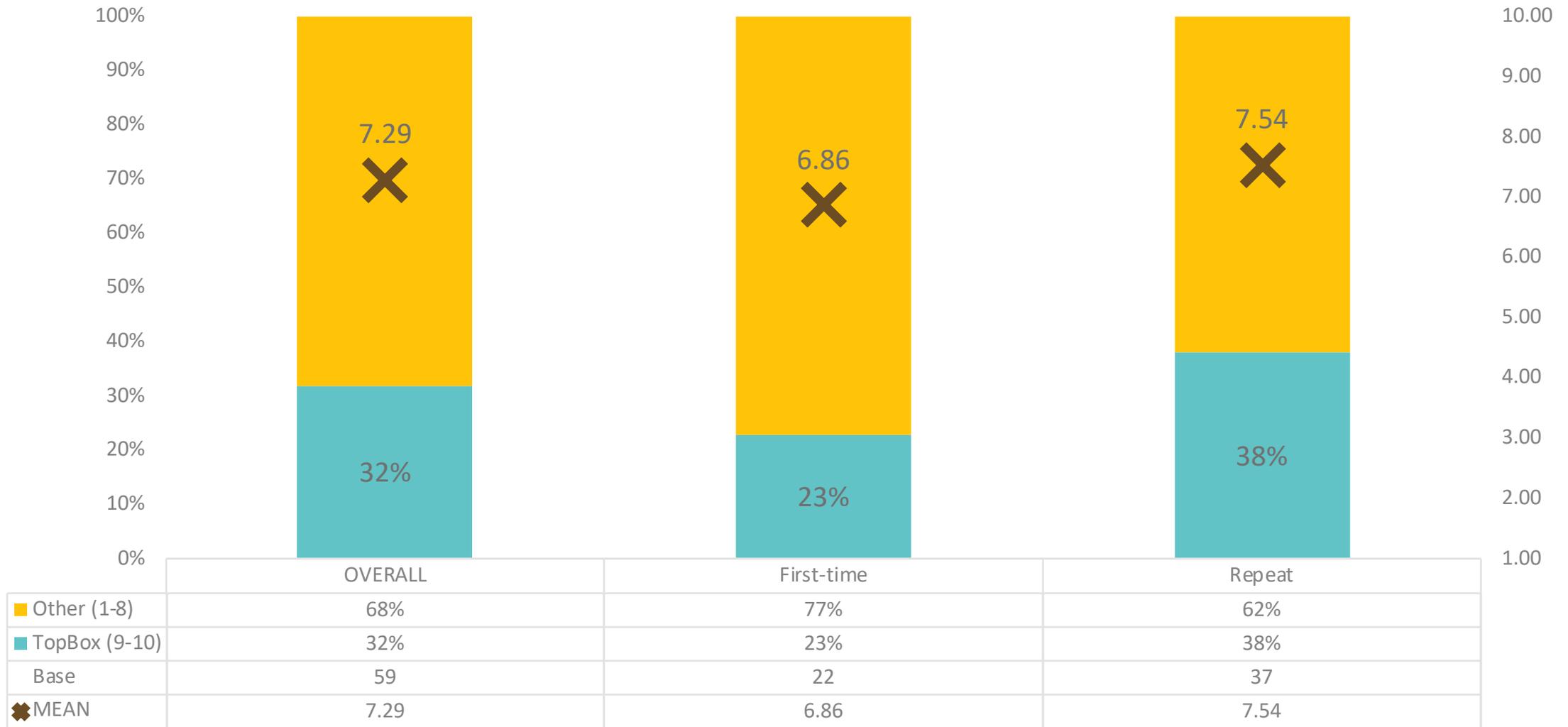


TRAVEL MOTIVATIONS – TOP 3

Tracking

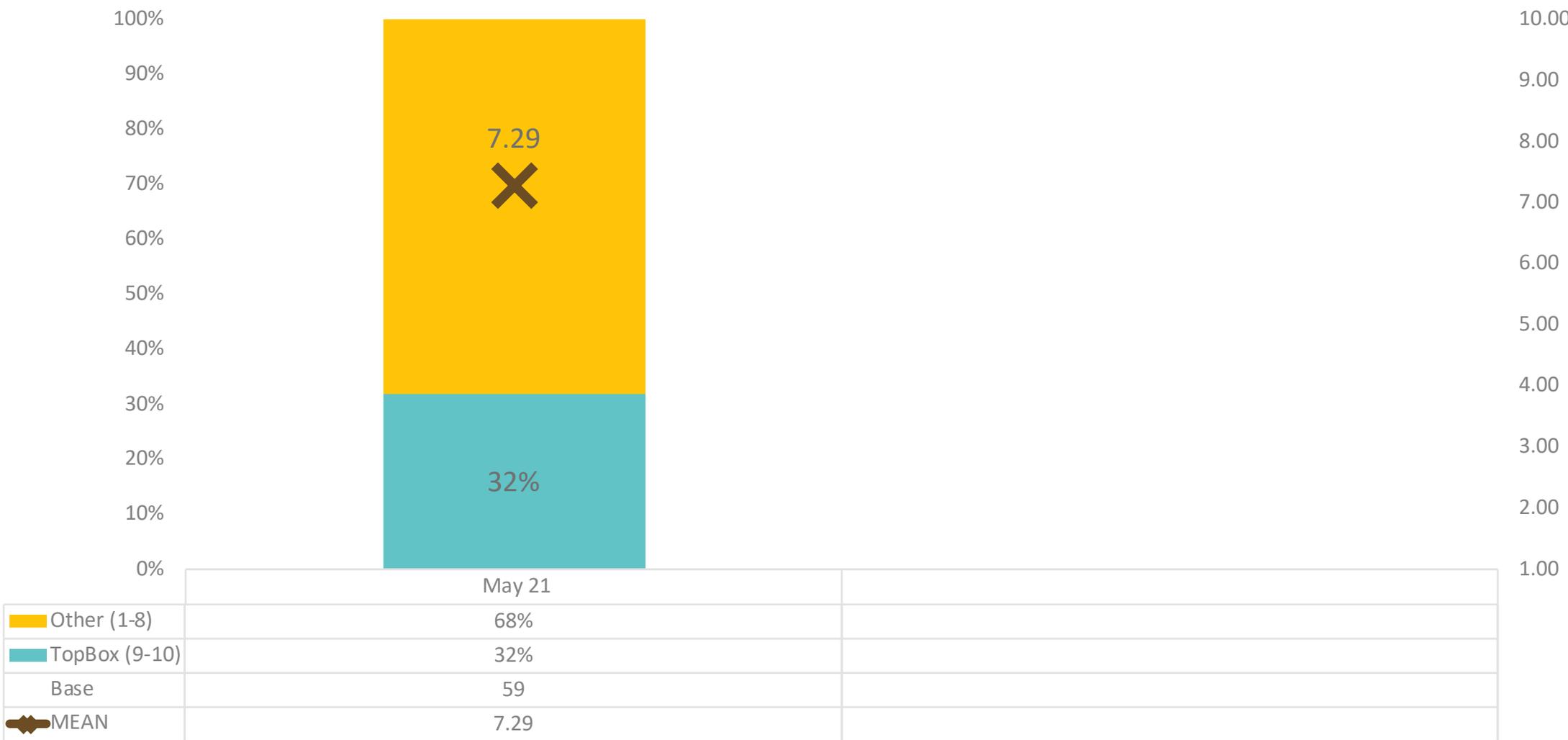
	May-21
BASE	59
Beautiful seas, beaches, tropical climate	56%
Safe place to spend a vacation	37%
Short travel time	37%
A previous trip	25%
Price	25%
Sightseeing	14%
Shopping	14%
Relaxation	10%
Water activities	7%

BRAND ADVOCACY – 10PT SCALE

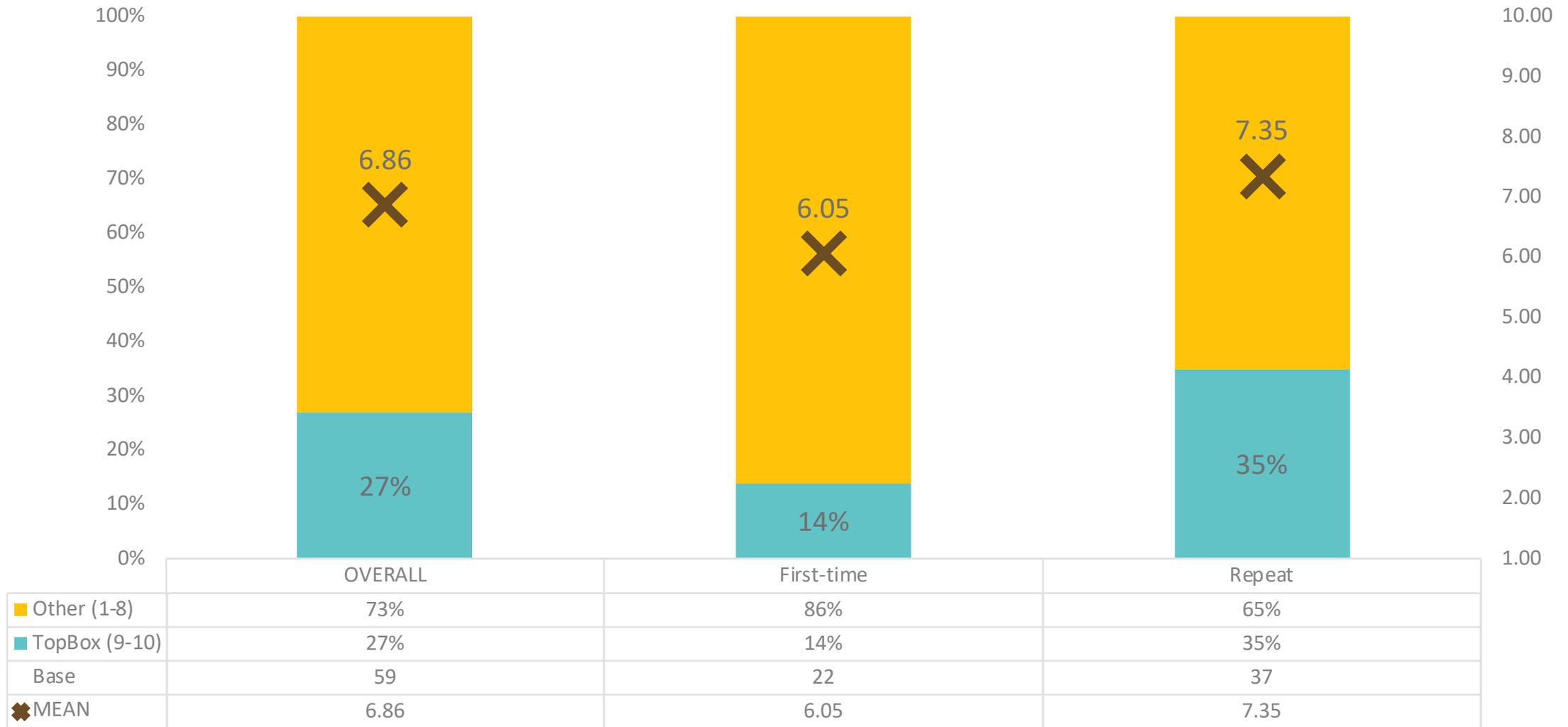


BRAND ADVOCACY – 10PT SCALE

Tracking

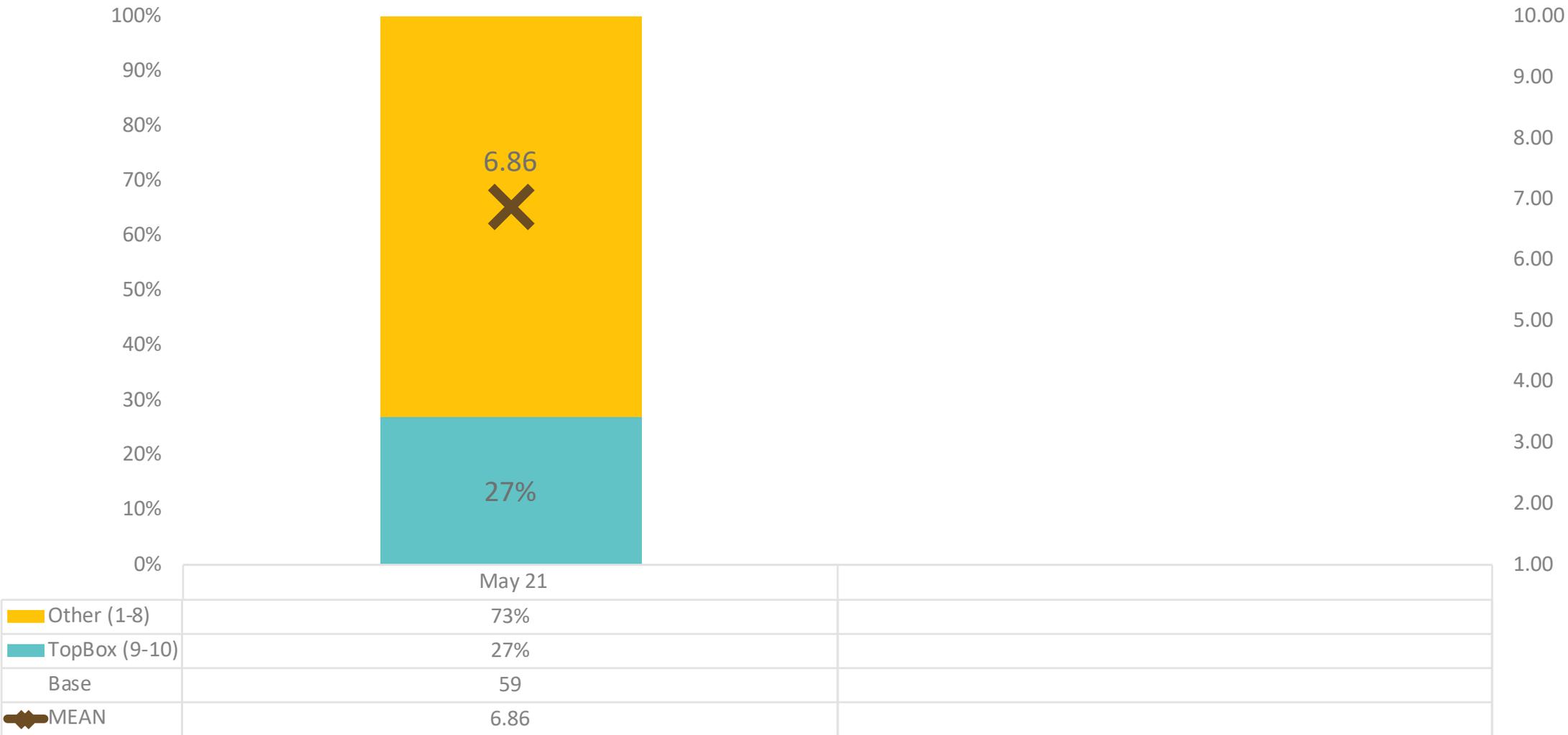


BRAND LOYALTY – 10PT SCALE

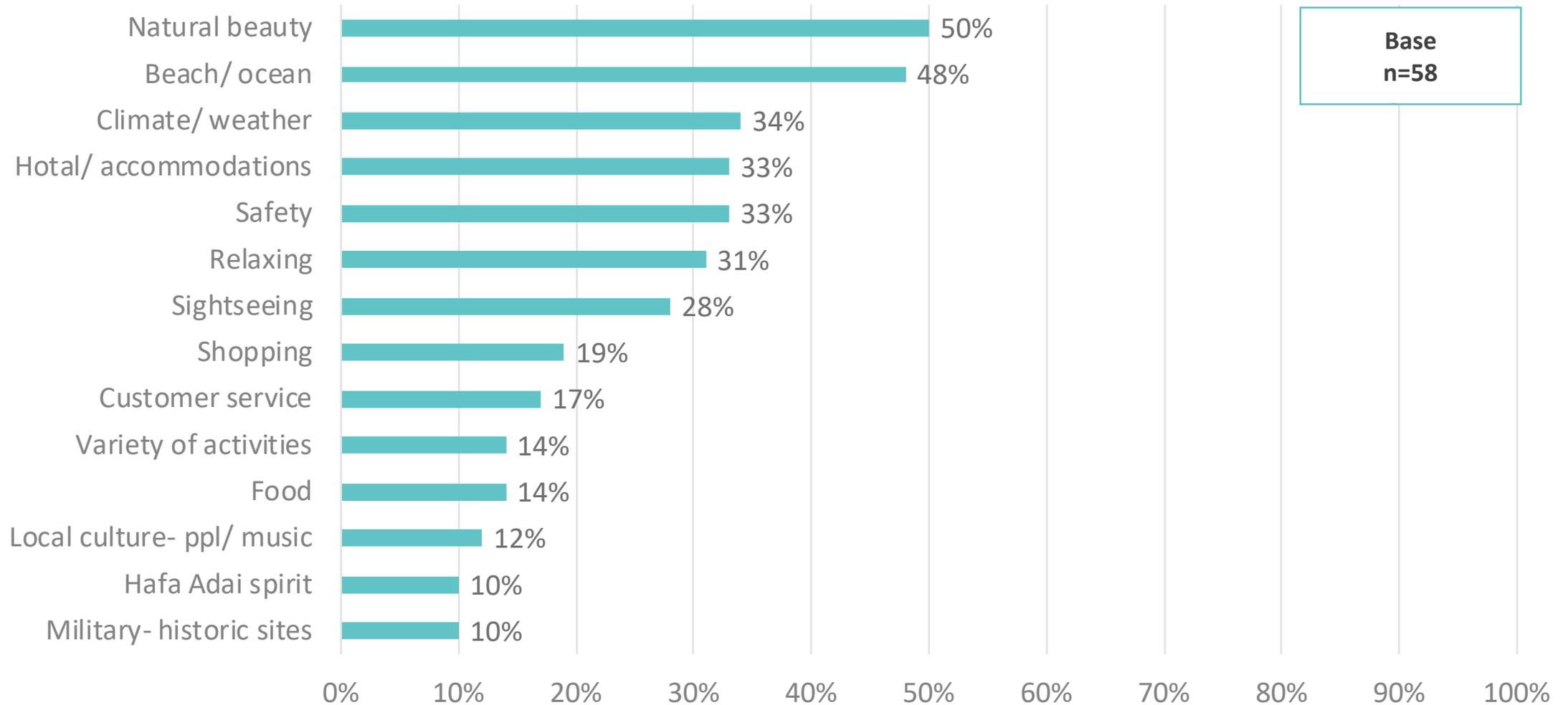


BRAND LOYALTY – 10PT SCALE

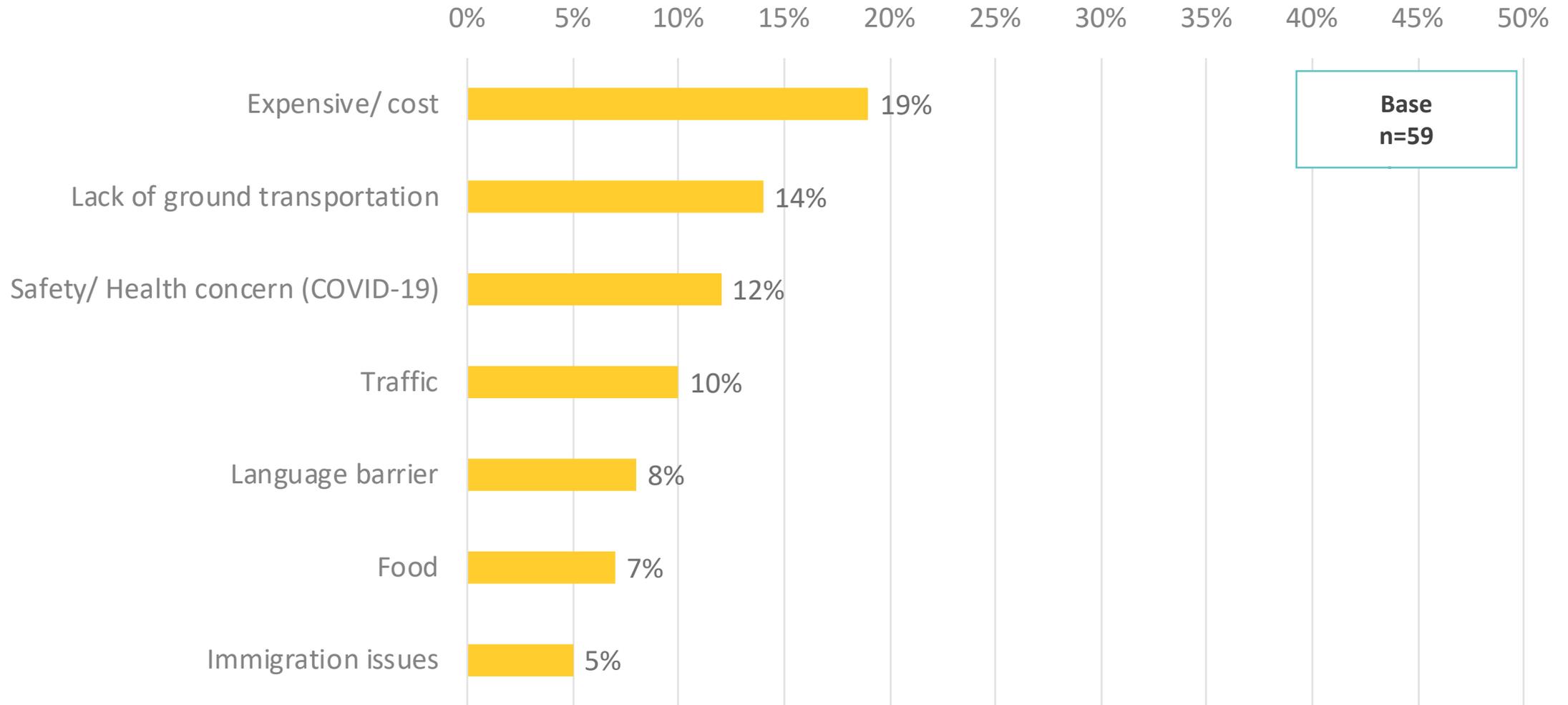
Tracking



GUAM TRAVELER - TRIP MOTIVATIONS



GUAM TRAVELERS – DRAWBACKS



GUAM TRAVELERS – DRAWBACKS TRACKING

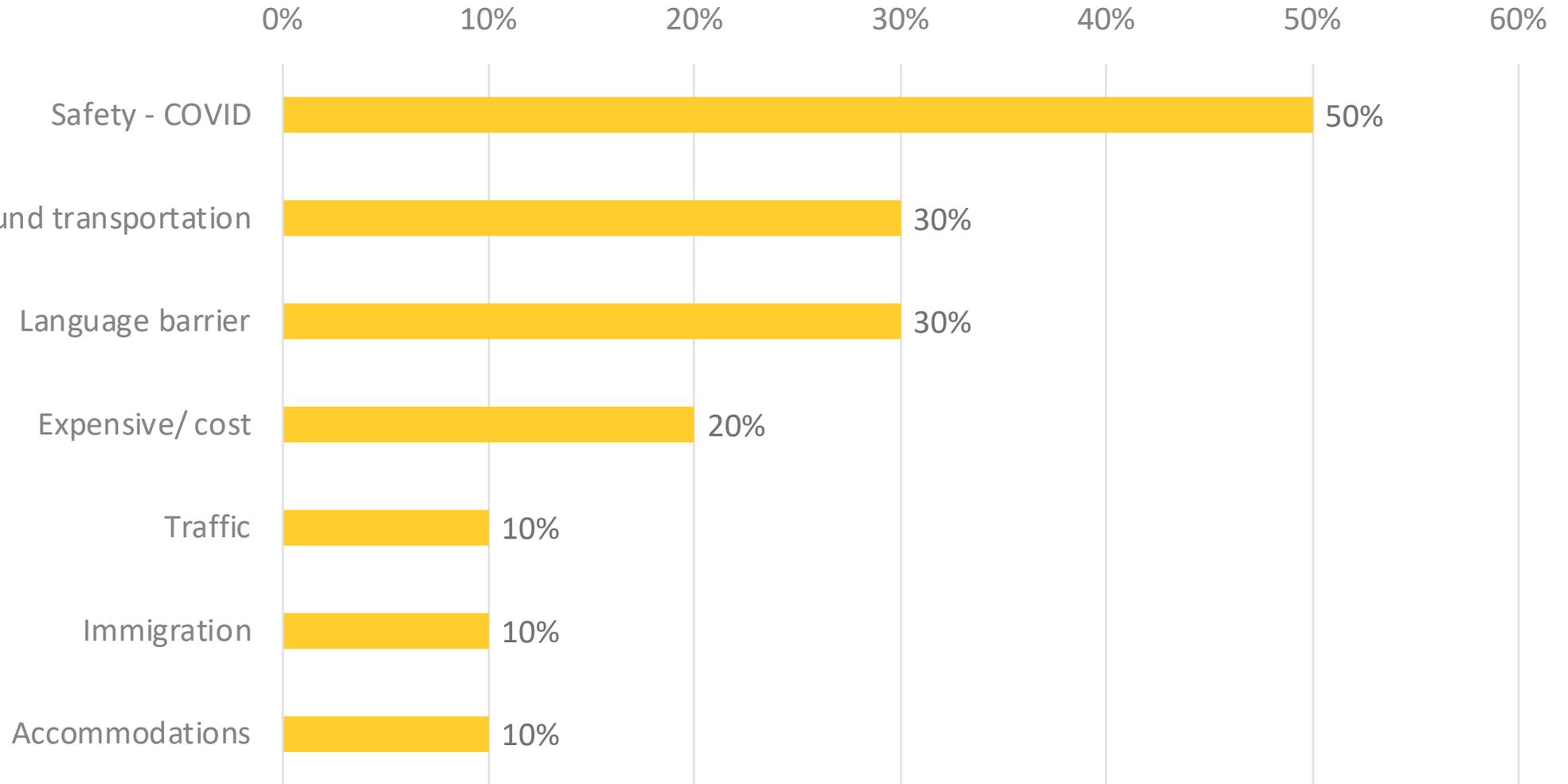
	May 21
BASE	59
Expensive	19%
Limited availability – ground transportation	14%
Safety- Health/ COVID	12%
Traffic	10%
Language barrier	8%
Food	7%
Immigration	5%

Q: (Very or somewhat unlikely to consider Guam) Why do you say you are unlikely to consider Guam for your next vacation?



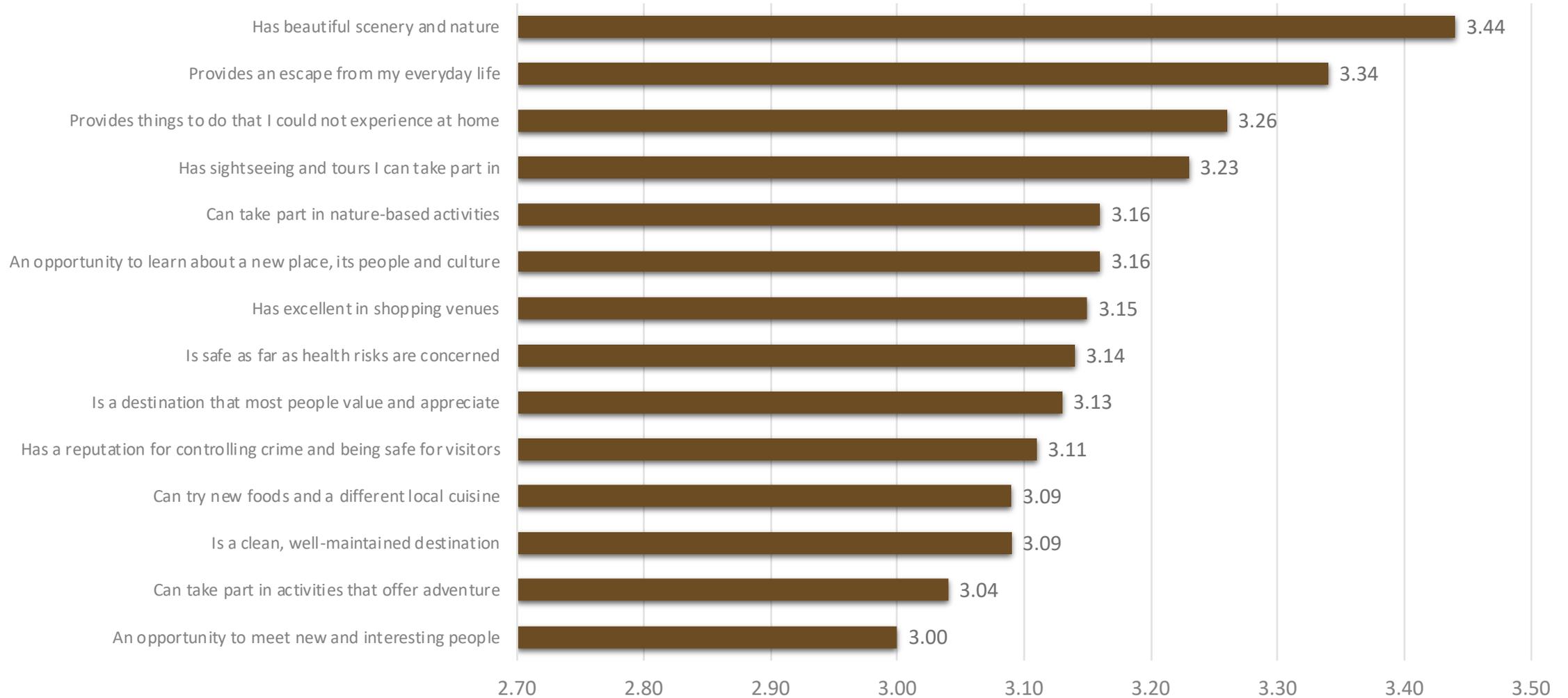
UNLIKELY TO RETURN – REASONS

Caution
small
base
n=10

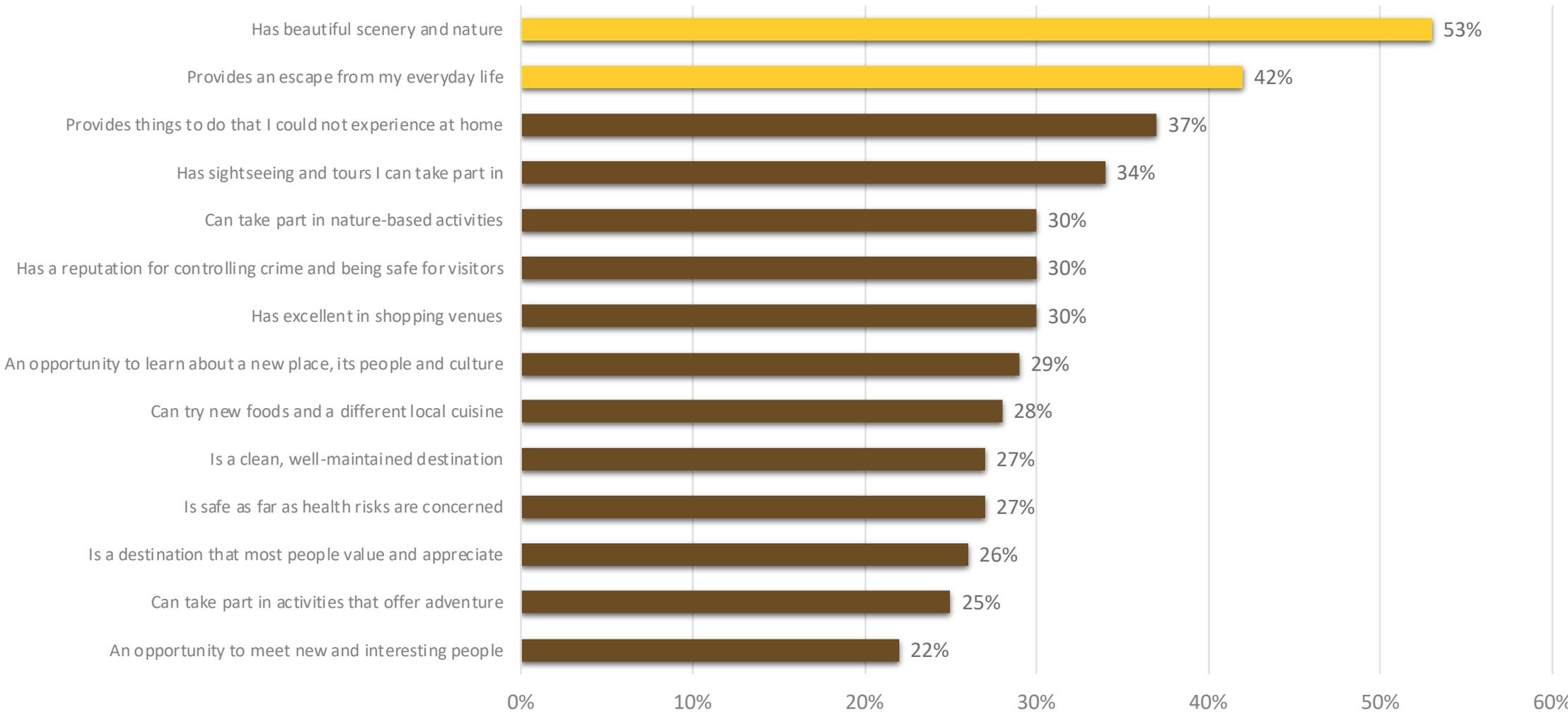


SELECTION FACTORS – SATISFACTION

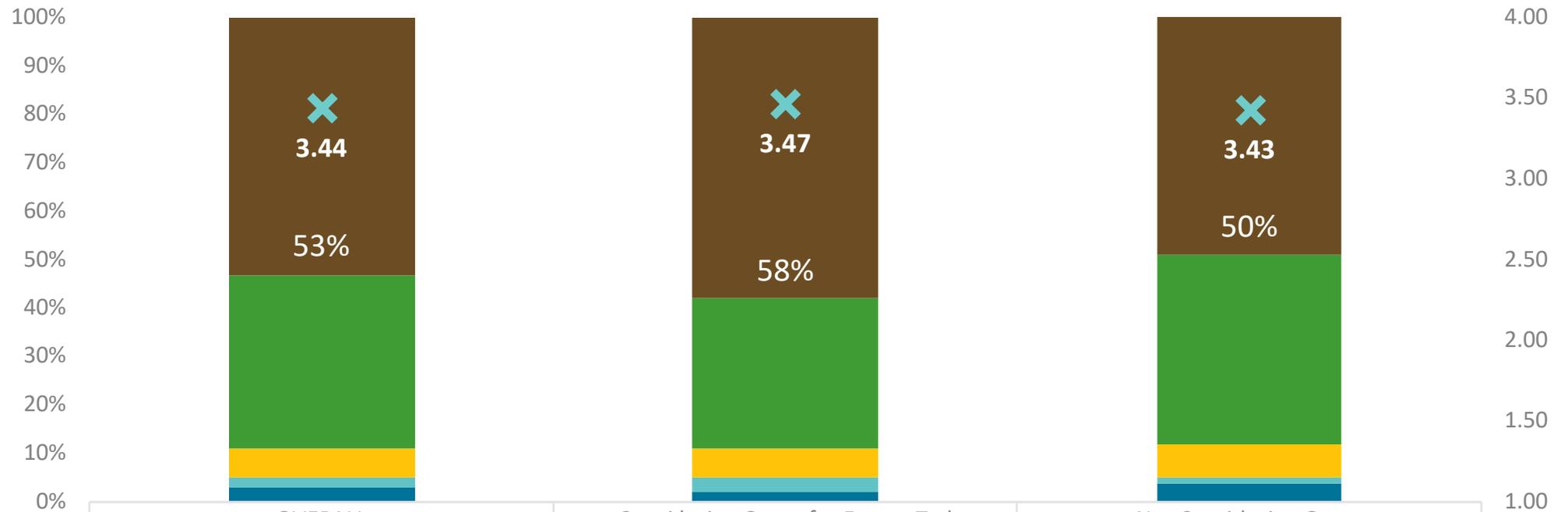
MEAN SCORES 4PT SCALE



SELECTION FACTORS – SATISFACTION TOP BOX (VERY GOOD)

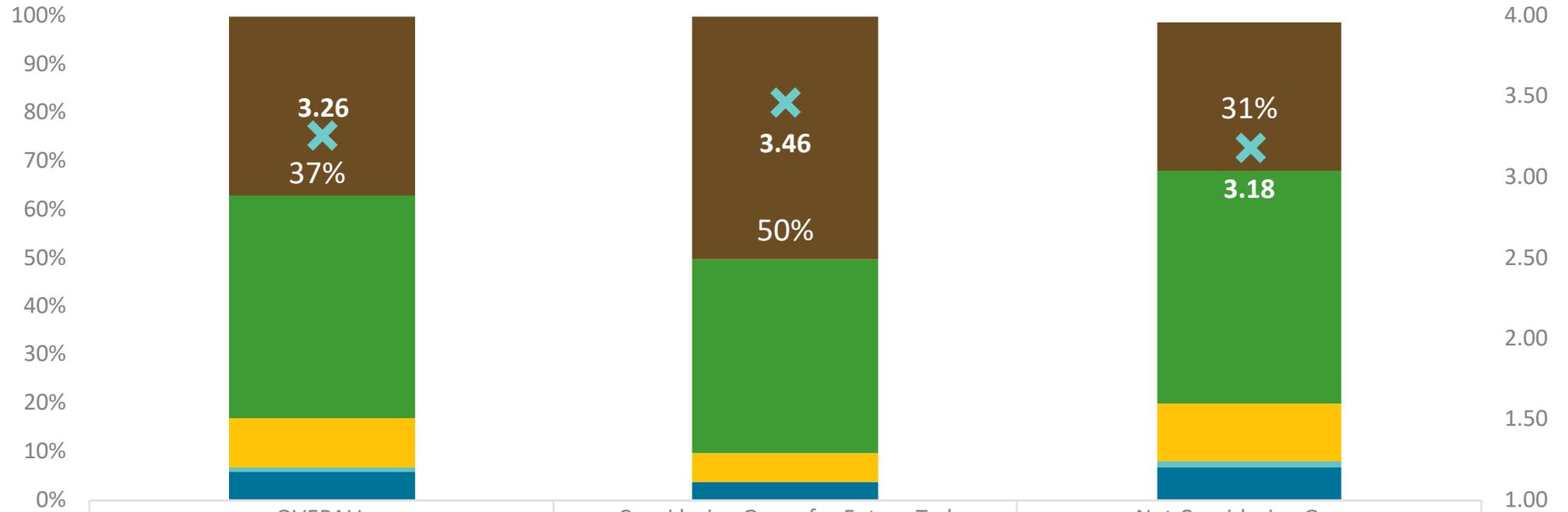


Has beautiful scenery and nature



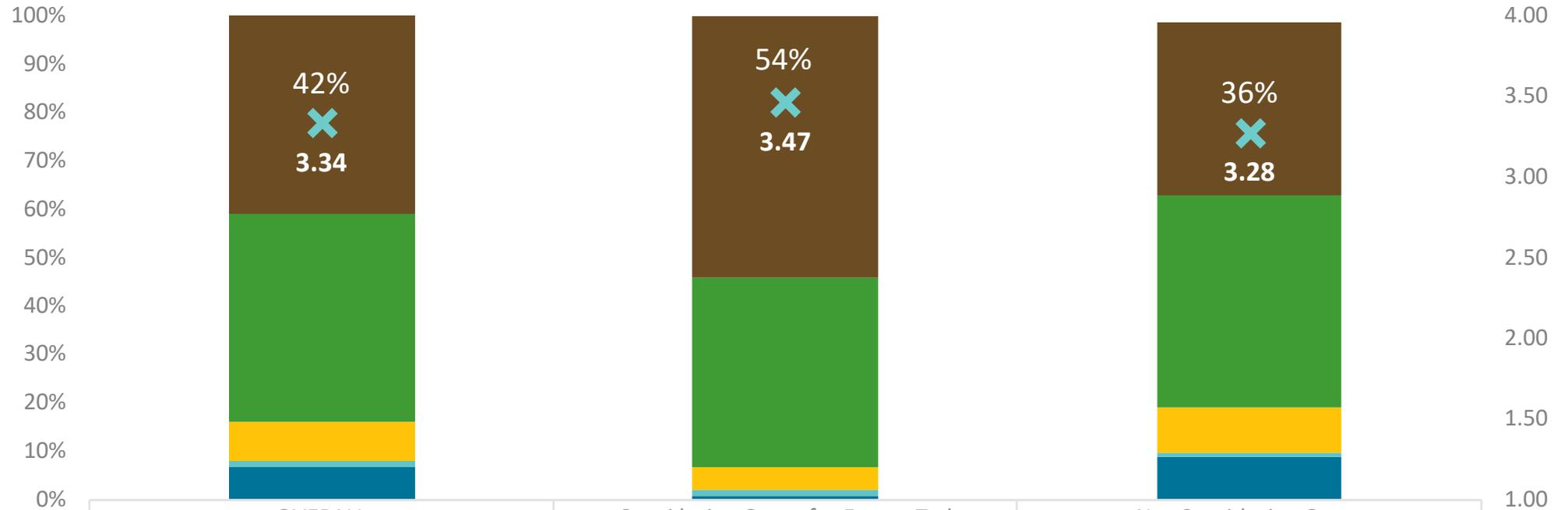
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	53%	58%	50%
Somewhat Good (3)	36%	31%	39%
Somewhat Poor (2)	6%	6%	7%
Very Poor (1)	2%	3%	1%
Don't know	3%	2%	4%
BASE	325	98	227
MEAN	3.44	3.47	3.43

Provides things to do that I could not experience at home



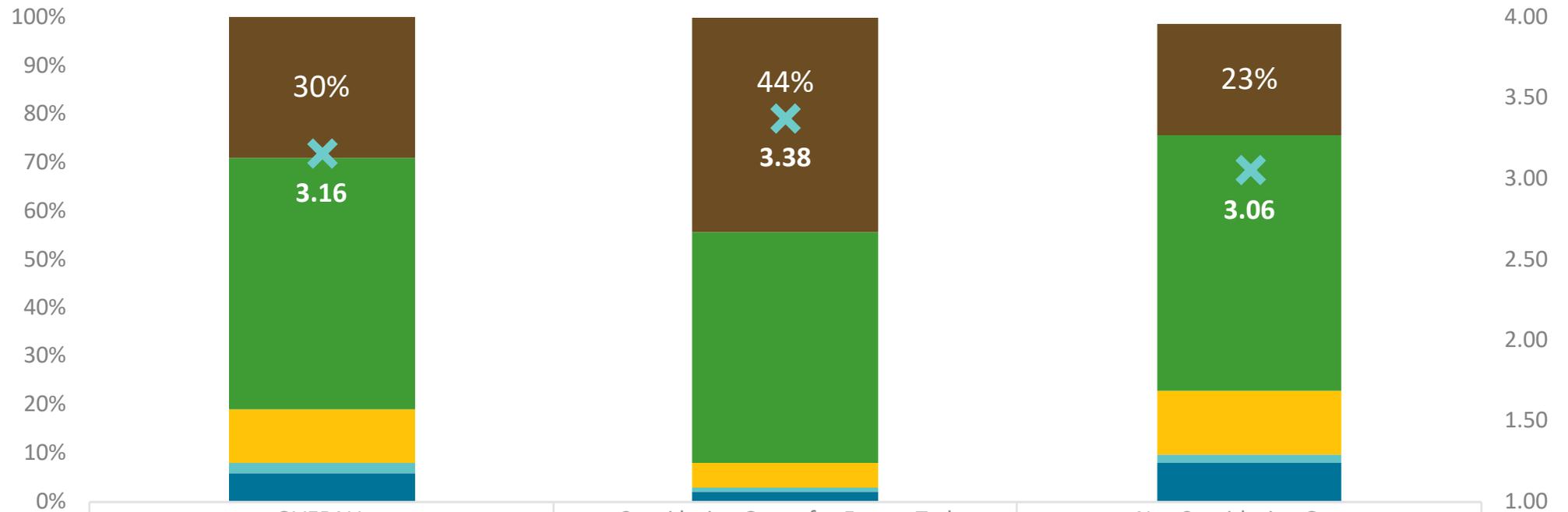
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	37%	50%	31%
Somewhat Good (3)	46%	40%	48%
Somewhat Poor (2)	10%	6%	12%
Very Poor (1)	1%		1%
Don't know	6%	4%	7%
BASE	325	98	227
MEAN	3.26	3.46	3.18

Provides an escape from my everyday life



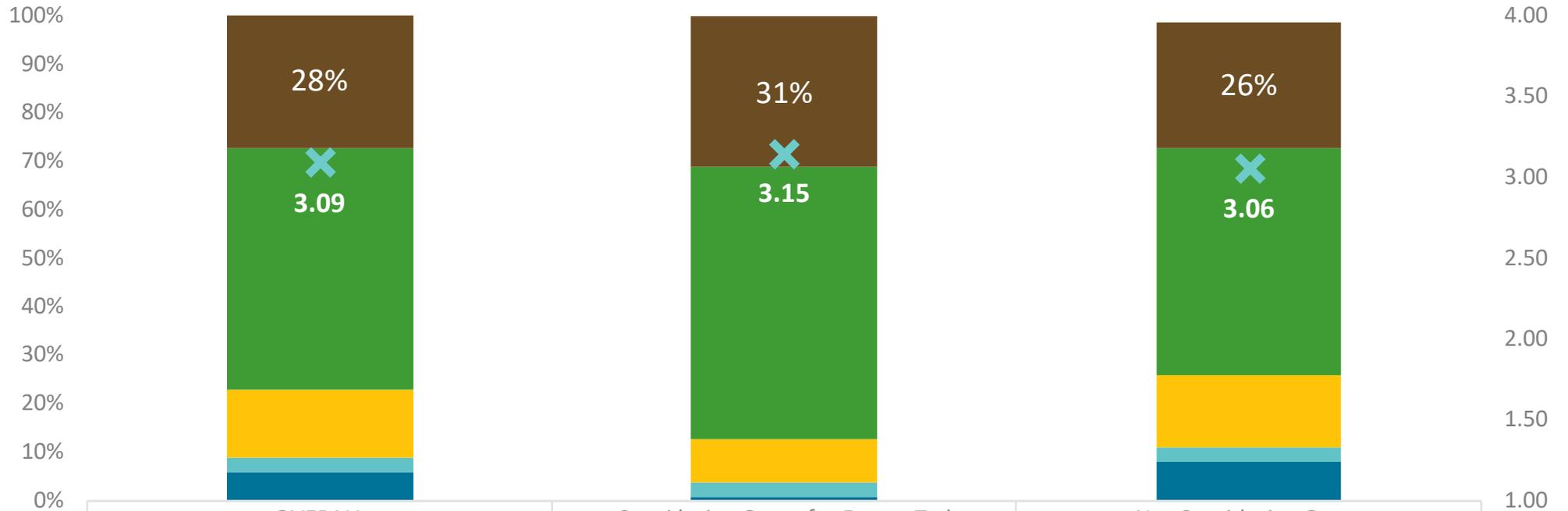
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	42%	54%	36%
Somewhat Good (3)	43%	39%	44%
Somewhat Poor (2)	8%	5%	9%
Very Poor (1)	1%	1%	1%
Don't know	7%	1%	9%
BASE	325	98	227
MEAN	3.34	3.47	3.28

Can take part in nature-based activities



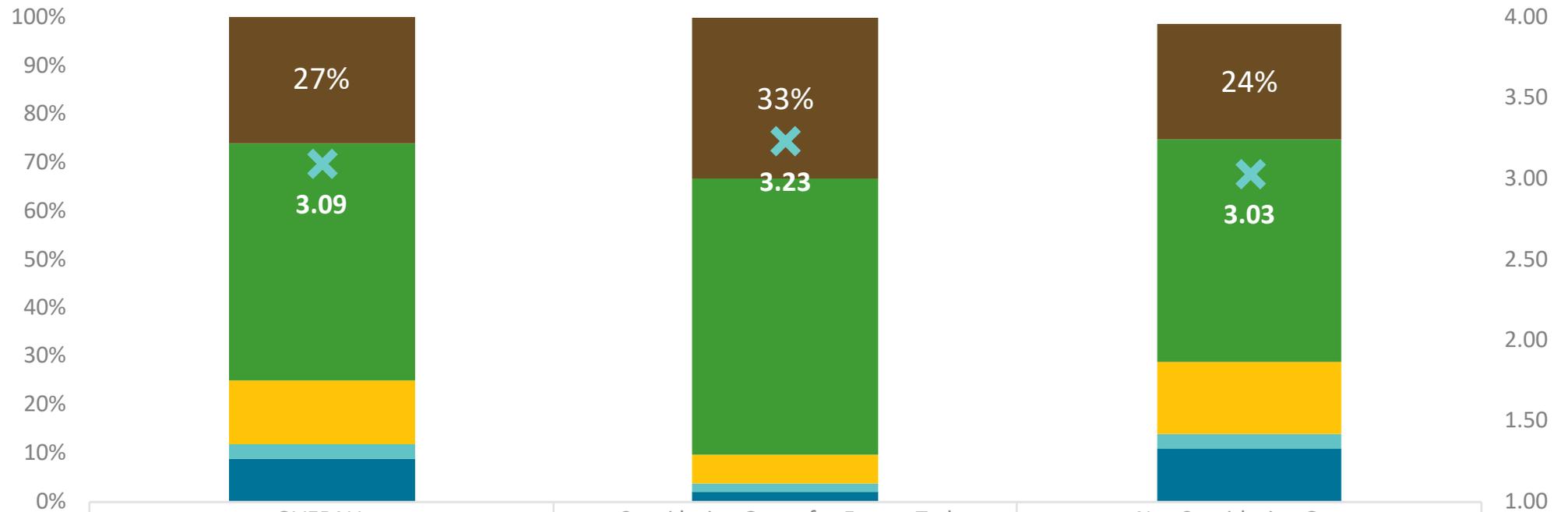
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	30%	44%	23%
Somewhat Good (3)	52%	48%	53%
Somewhat Poor (2)	11%	5%	13%
Very Poor (1)	2%	1%	2%
Don't know	6%	2%	8%
BASE	325	98	227
MEAN	3.16	3.38	3.06

Can try new foods and a different local cuisine



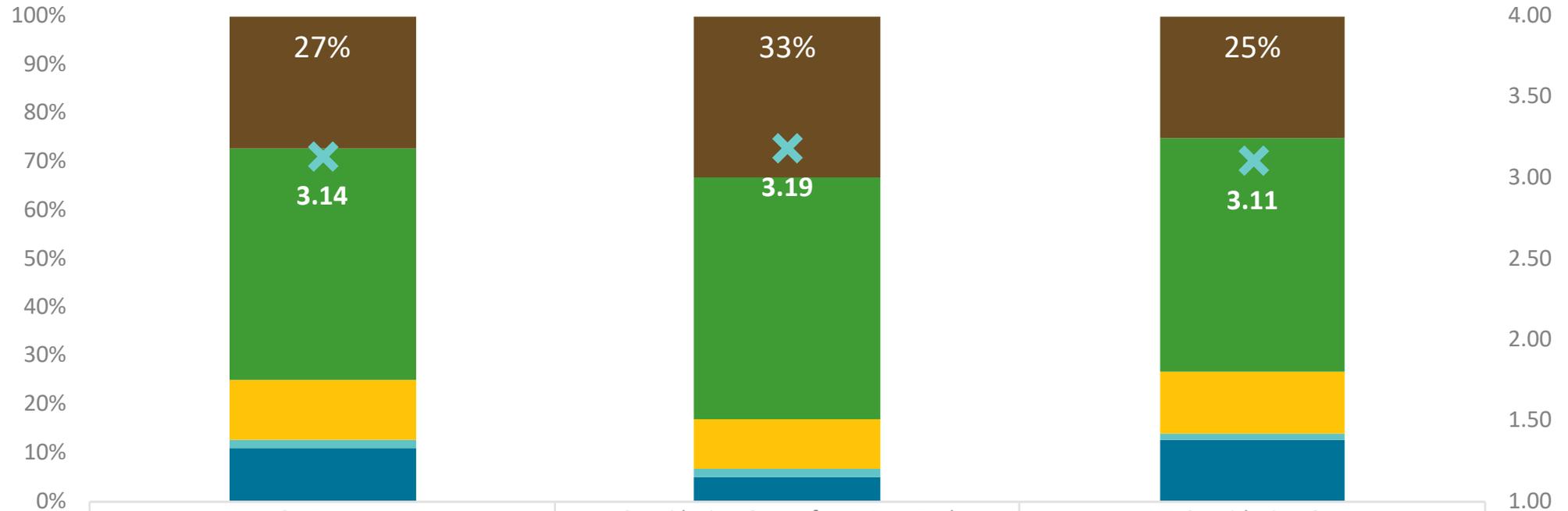
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	28%	31%	26%
Somewhat Good (3)	50%	56%	47%
Somewhat Poor (2)	14%	9%	15%
Very Poor (1)	3%	3%	3%
Don't know	6%	1%	8%
BASE	325	98	227
MEAN	3.09	3.15	3.06

Is a clean, well-maintained destination



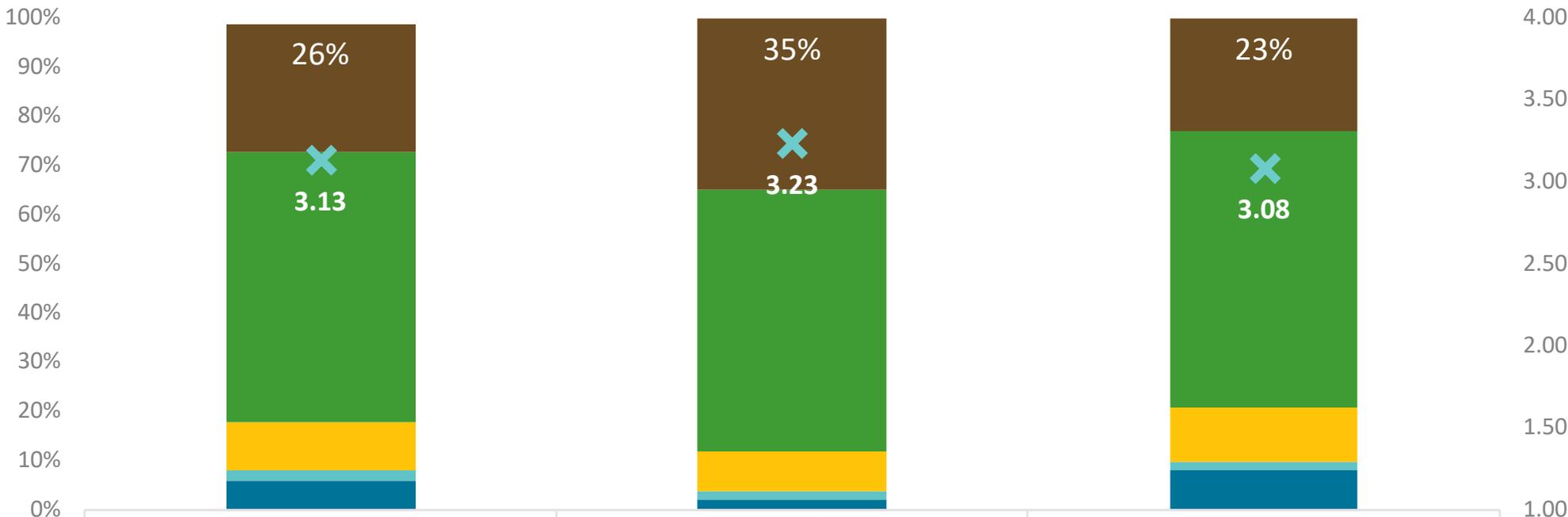
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	27%	33%	24%
Somewhat Good (3)	49%	57%	46%
Somewhat Poor (2)	13%	6%	15%
Very Poor (1)	3%	2%	3%
Don't know	9%	2%	11%
BASE	325	98	227
MEAN	3.09	3.23	3.03

Is safe as far as health risks are concerned



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	27%	33%	25%
Somewhat Good (3)	48%	50%	48%
Somewhat Poor (2)	12%	10%	13%
Very Poor (1)	2%	2%	1%
Don't know	11%	5%	13%
BASE	325	98	227
MEAN	3.14	3.19	3.11

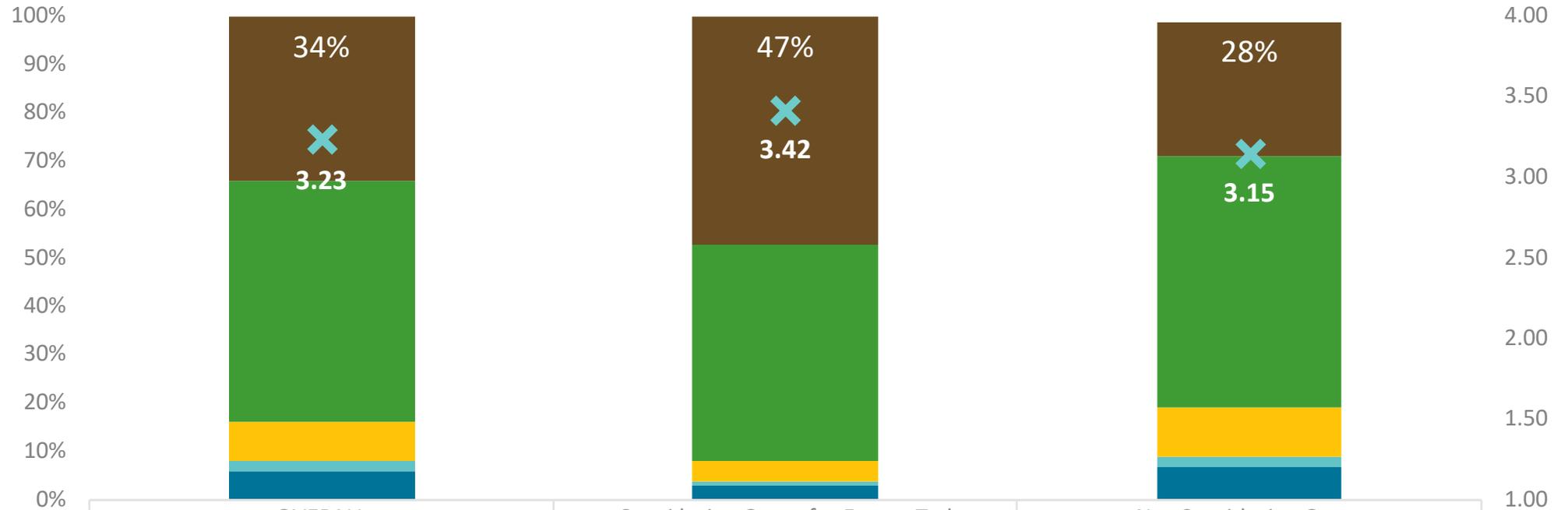
Is a destination that most people value and appreciate



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	26%	35%	23%
Somewhat Good (3)	55%	53%	56%
Somewhat Poor (2)	10%	8%	11%
Very Poor (1)	2%	2%	2%
Don't know	6%	2%	8%
BASE	325	98	227
MEAN	3.13	3.23	3.08

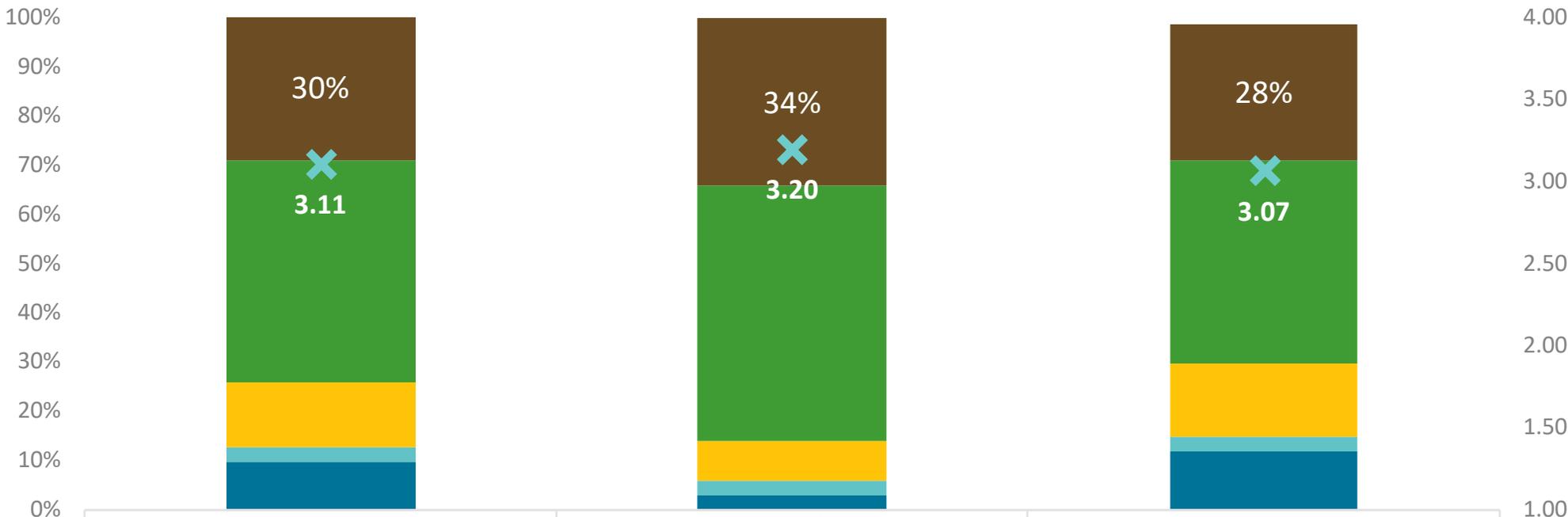


Has sightseeing and tours I can take part in



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	34%	47%	28%
Somewhat Good (3)	50%	45%	52%
Somewhat Poor (2)	8%	4%	10%
Very Poor (1)	2%	1%	2%
Don't know	6%	3%	7%
BASE	325	98	227
MEAN	3.23	3.42	3.15

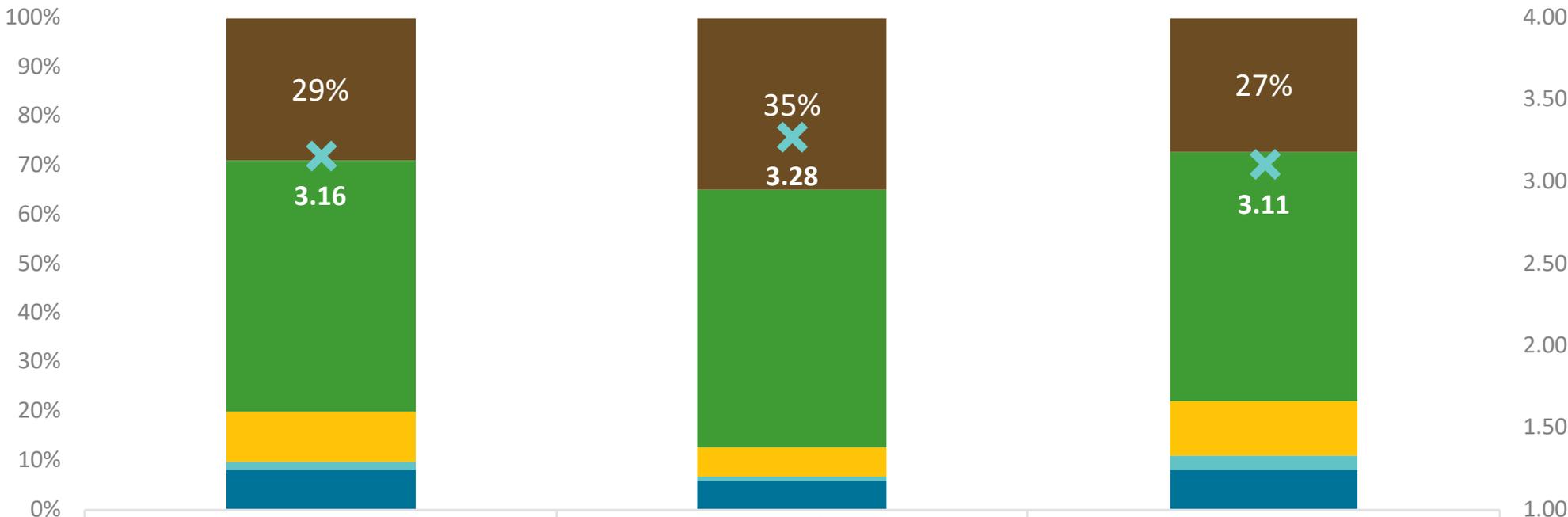
Has a reputation for controlling crime and being safe for visitors



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	30%	34%	28%
Somewhat Good (3)	45%	52%	41%
Somewhat Poor (2)	13%	8%	15%
Very Poor (1)	3%	3%	3%
Don't know	10%	3%	12%
BASE	325	98	227
MEAN	3.11	3.20	3.07

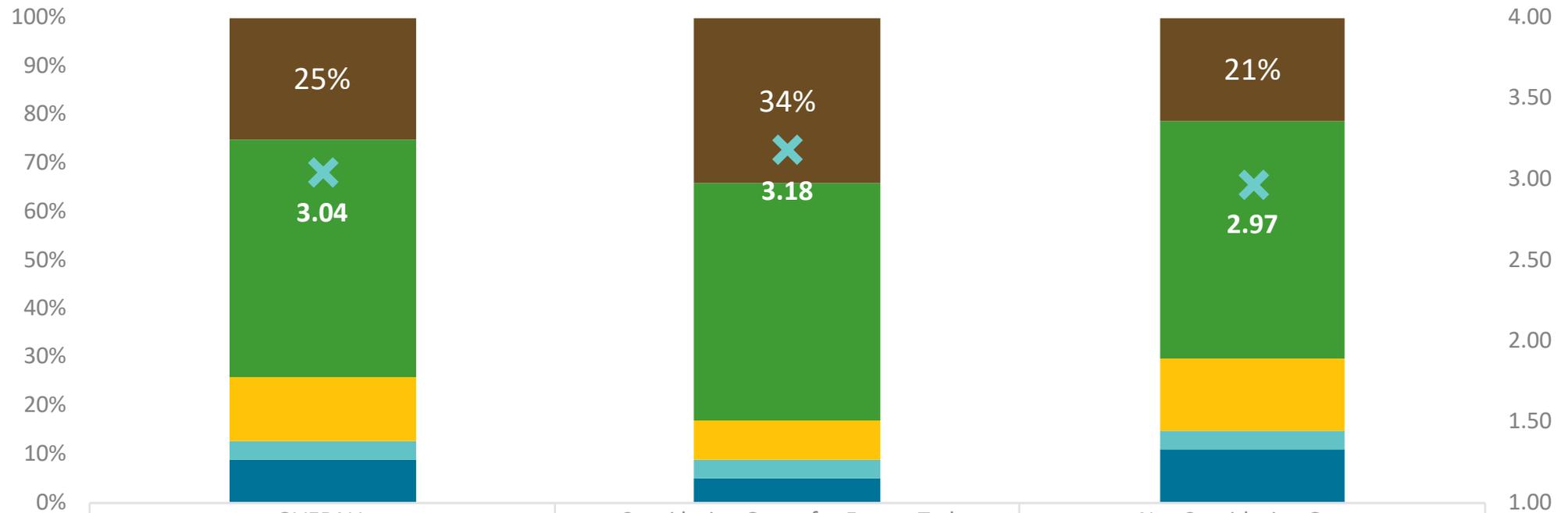


An opportunity to learn about a new place, its people and culture



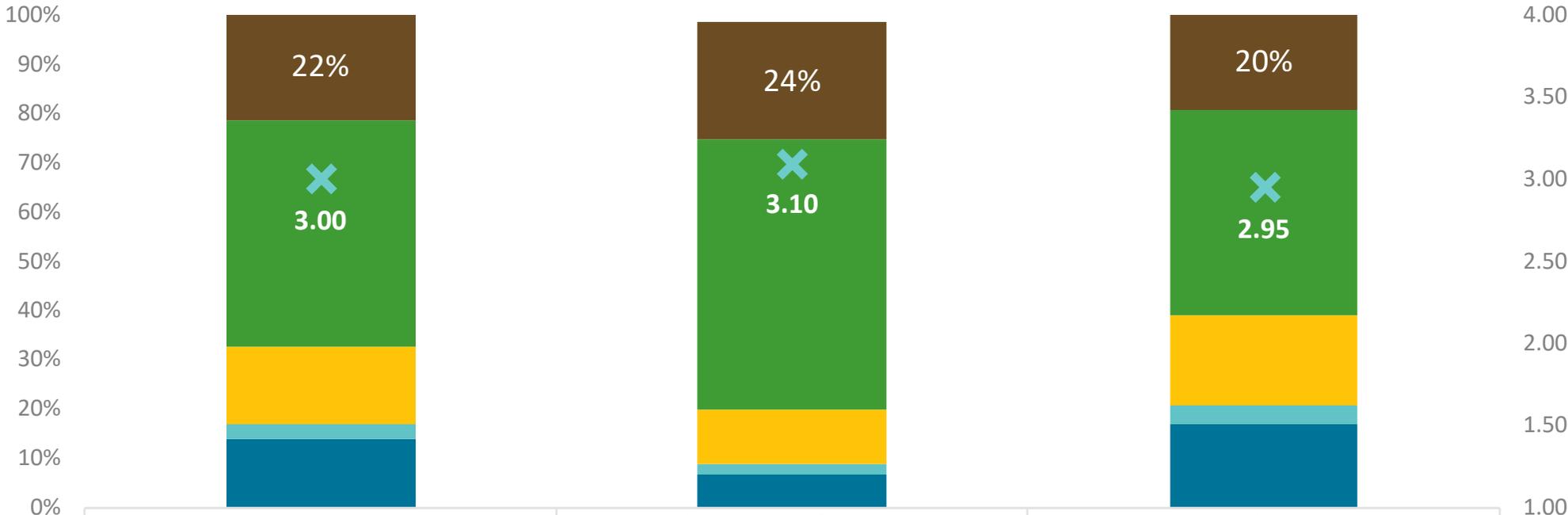
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	29%	35%	27%
Somewhat Good (3)	51%	52%	51%
Somewhat Poor (2)	10%	6%	11%
Very Poor (1)	2%	1%	3%
Don't know	8%	6%	8%
BASE	325	98	227
MEAN	3.16	3.28	3.11

Can take part in activities that offer adventure



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	25%	34%	21%
Somewhat Good (3)	49%	49%	49%
Somewhat Poor (2)	13%	8%	15%
Very Poor (1)	4%	4%	4%
Don't know	9%	5%	11%
BASE	325	98	227
MEAN	3.04	3.18	2.97

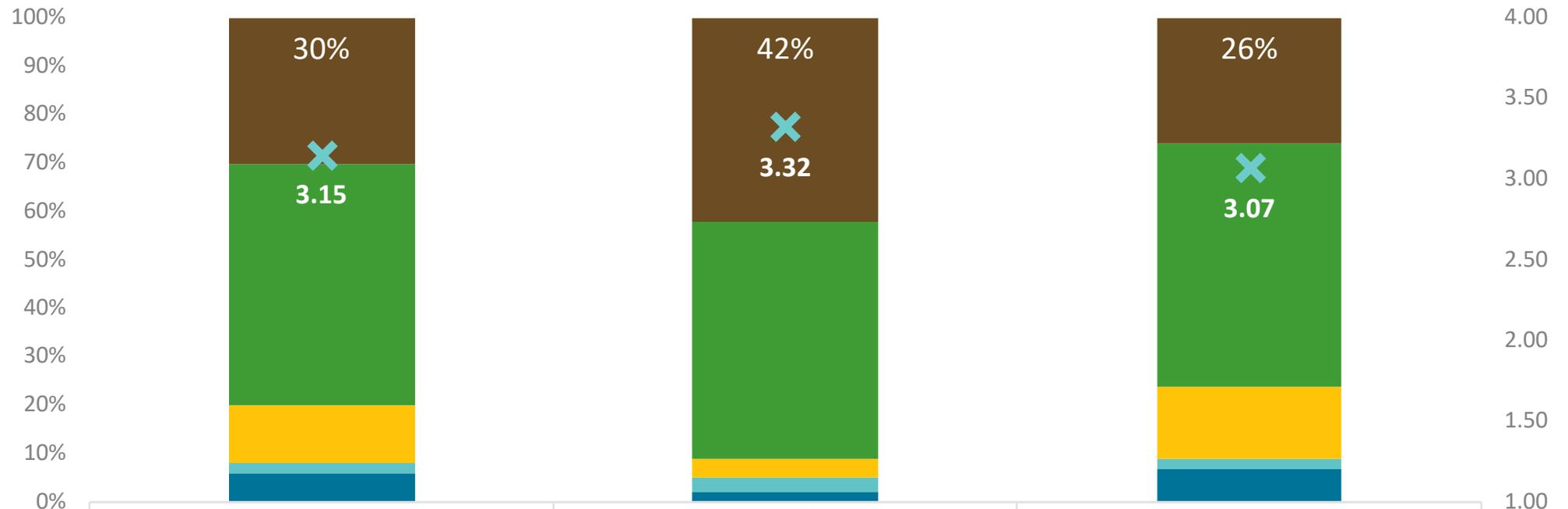
An opportunity to meet new and interesting people



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	22%	24%	20%
Somewhat Good (3)	46%	55%	42%
Somewhat Poor (2)	16%	11%	18%
Very Poor (1)	3%	2%	4%
Don't know	14%	7%	17%
BASE	325	98	227
MEAN	3.00	3.10	2.95

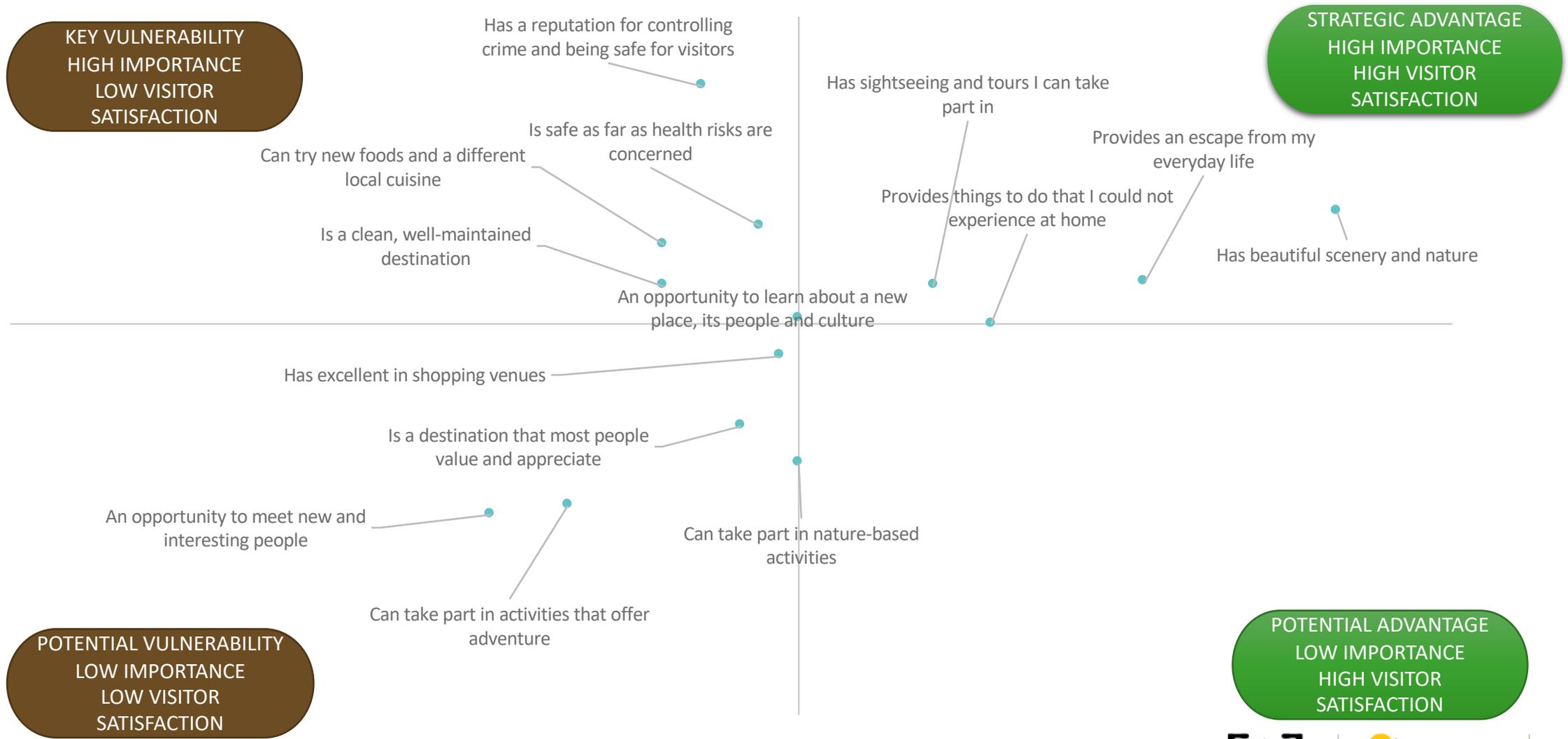


Has excellent shopping in venues



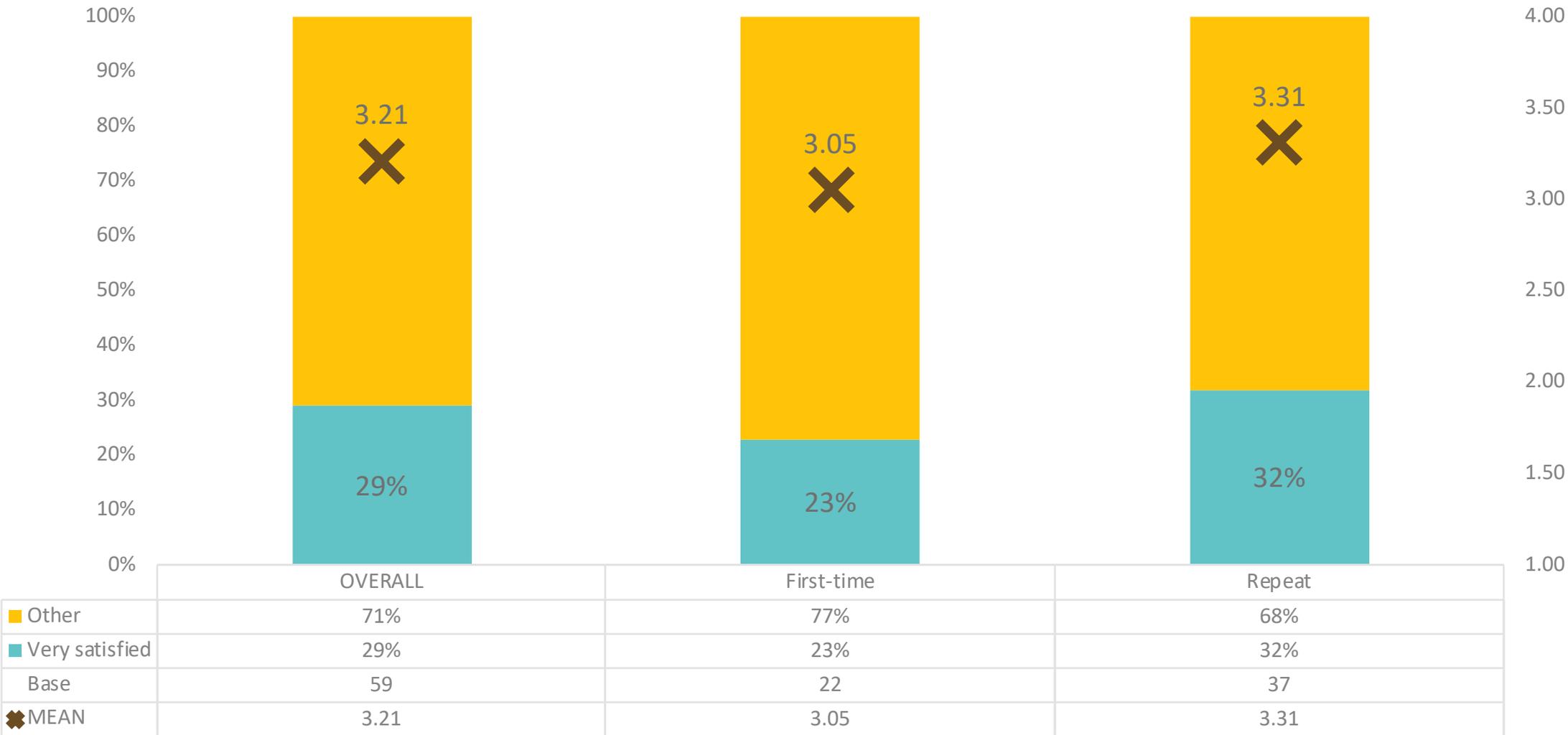
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	30%	42%	26%
Somewhat Good (3)	50%	49%	50%
Somewhat Poor (2)	12%	4%	15%
Very Poor (1)	2%	3%	2%
Don't know	6%	2%	7%
BASE	325	98	227
MEAN	3.15	3.32	3.07

NEED-GAP ANALYSIS



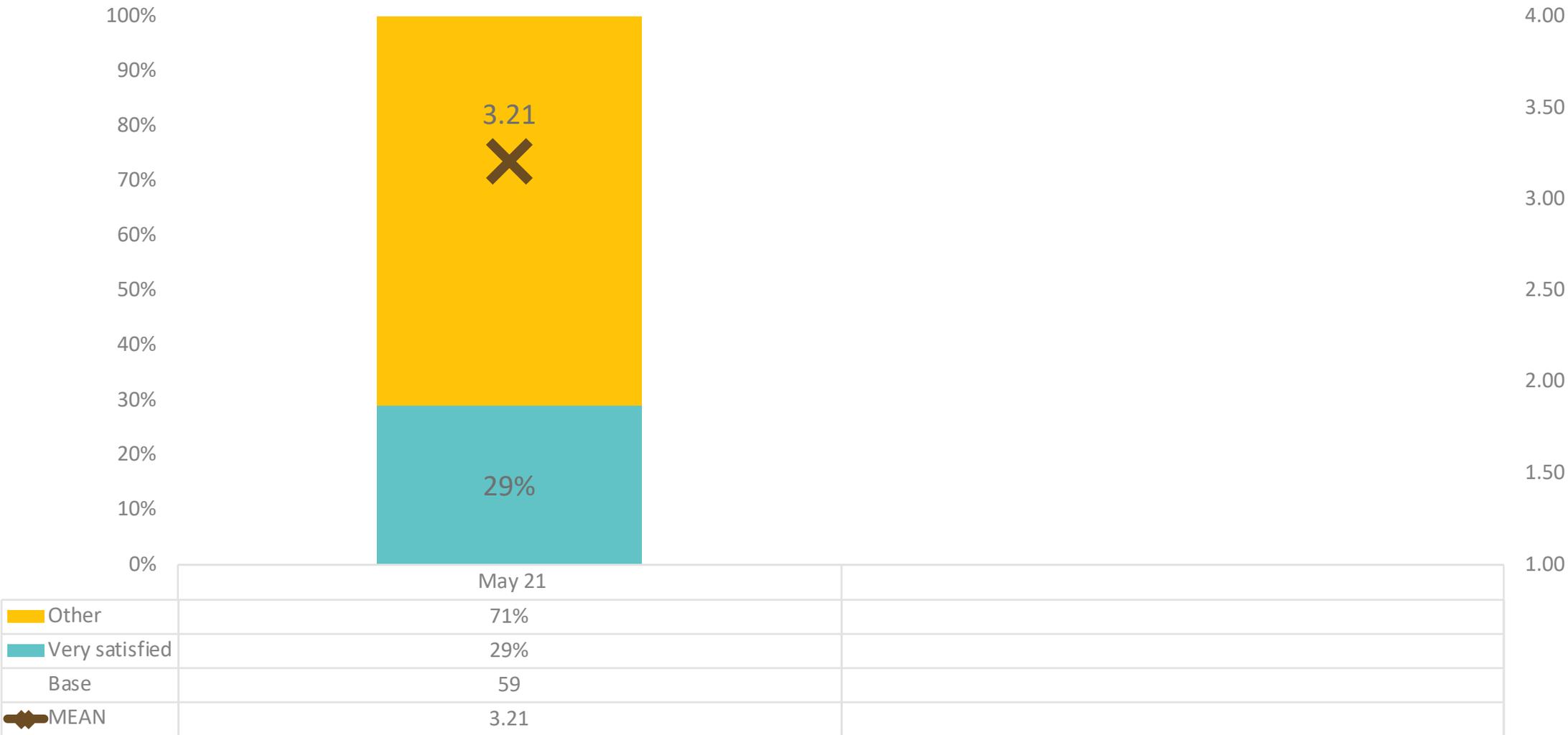
ACCOMMODATIONS – SATISFACTION

4PT RATING SCALE



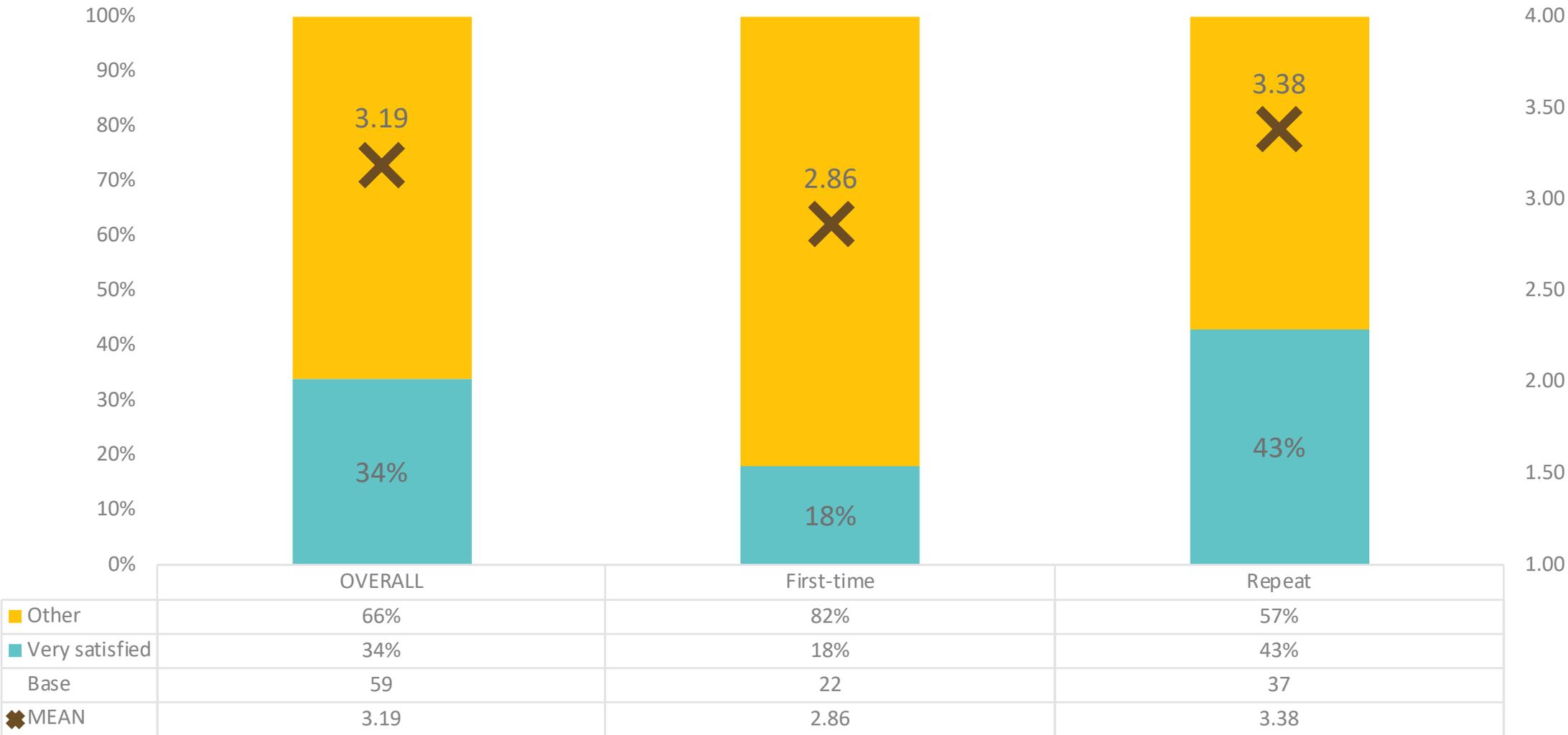
ACCOMMODATIONS – SATISFACTION

4PT RATING SCALE – TRACKING



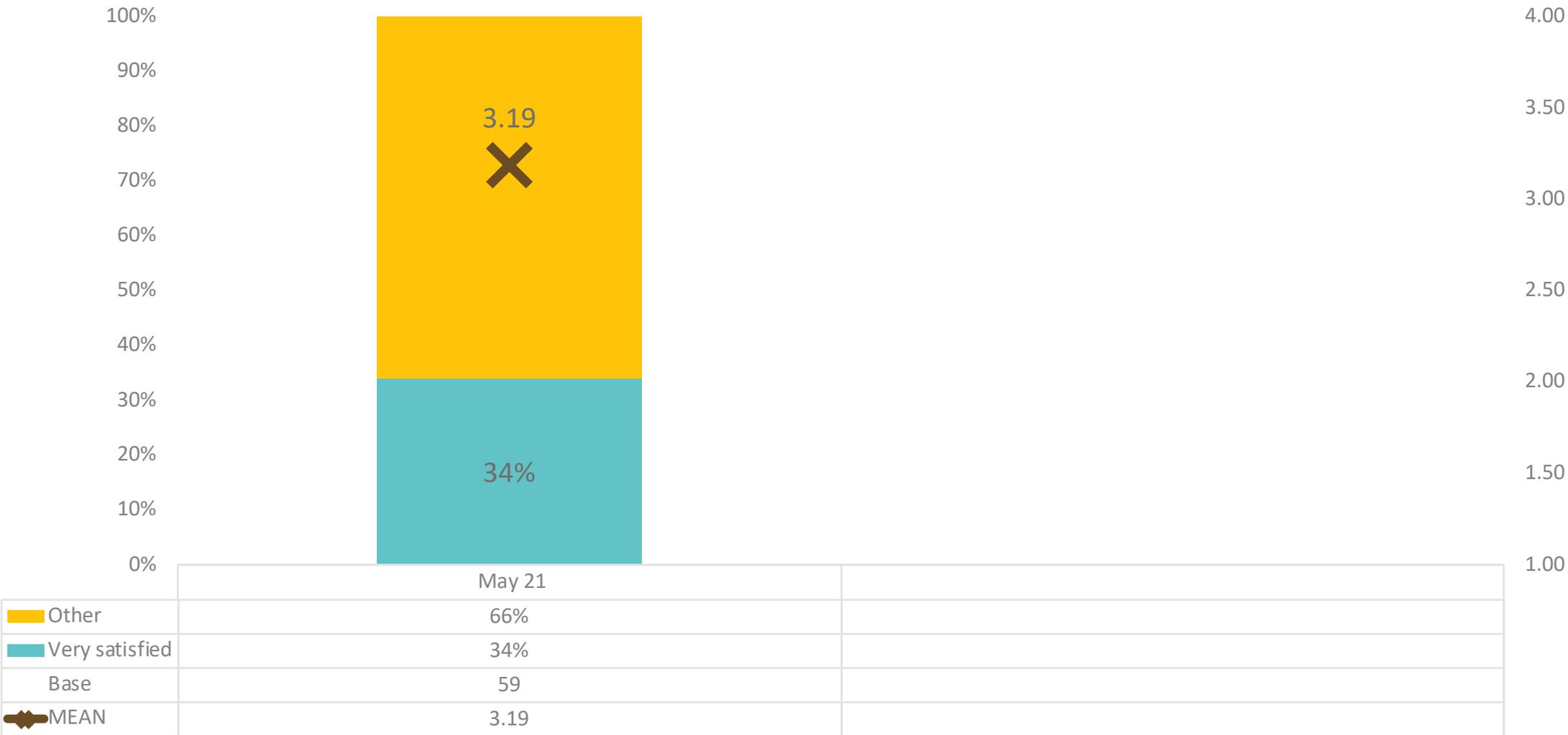
QUALITY CUSTOMER SERVICE – SATISFACTION

4PT RATING SCALE



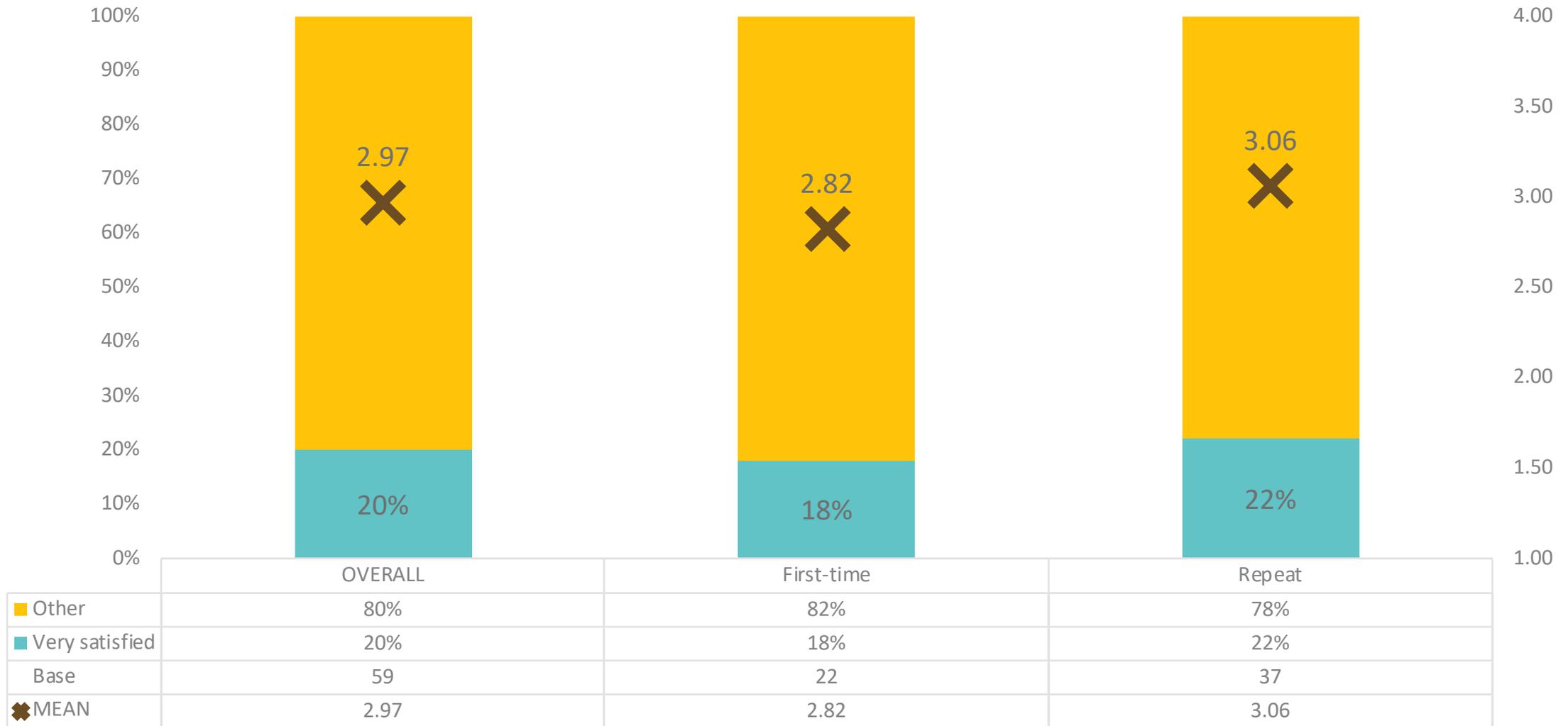
QUALITY CUSTOMER SERVICE – SATISFACTION

4PT RATING SCALE – TRACKING



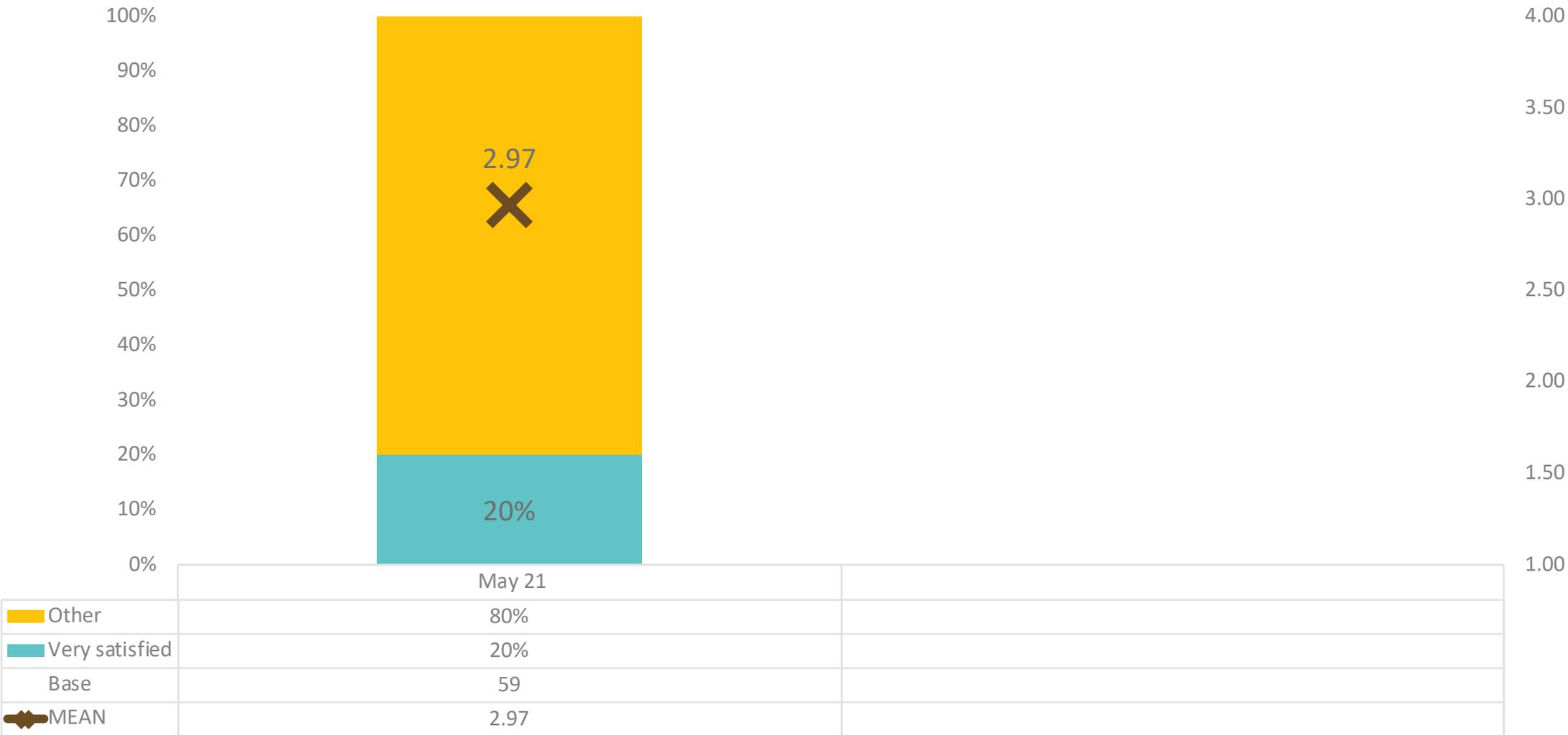
TRANSPORTATION OPTIONS – SATISFACTION

4PT RATING SCALE



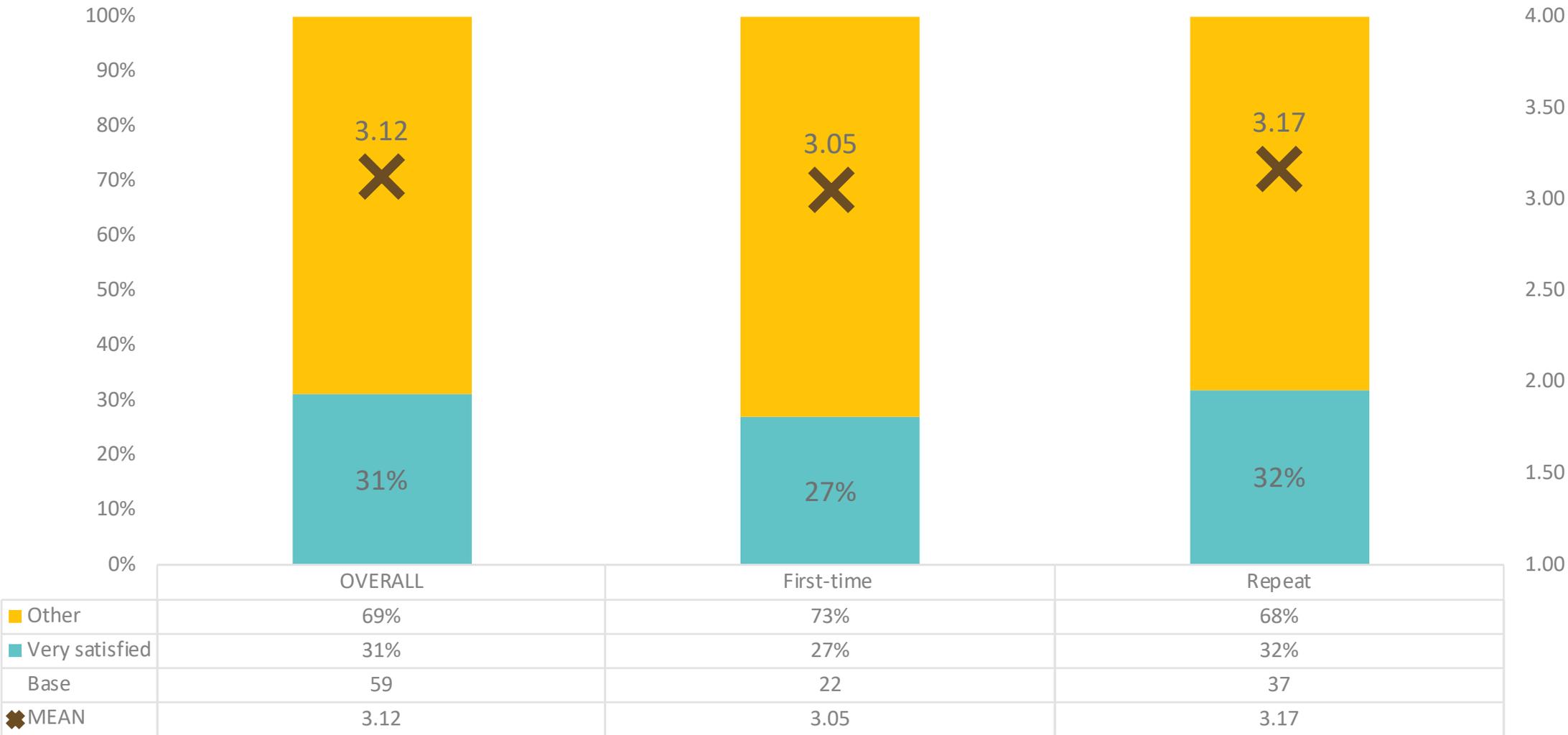
TRANSPORTATION OPTIONS – SATISFACTION

4PT RATING SCALE – TRACKING



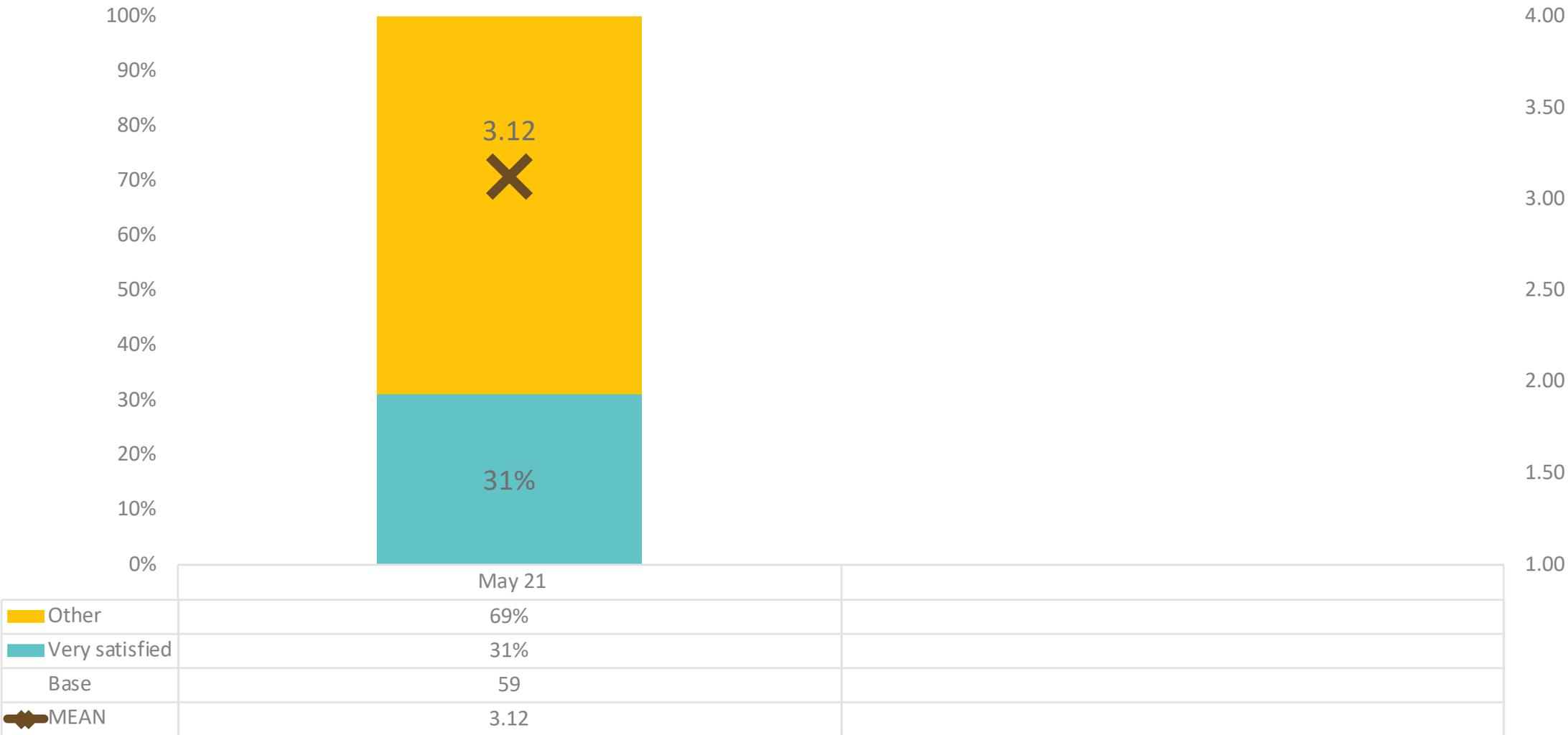
VISITORS FEEL WELCOME – SATISFACTION

4PT RATING SCALE



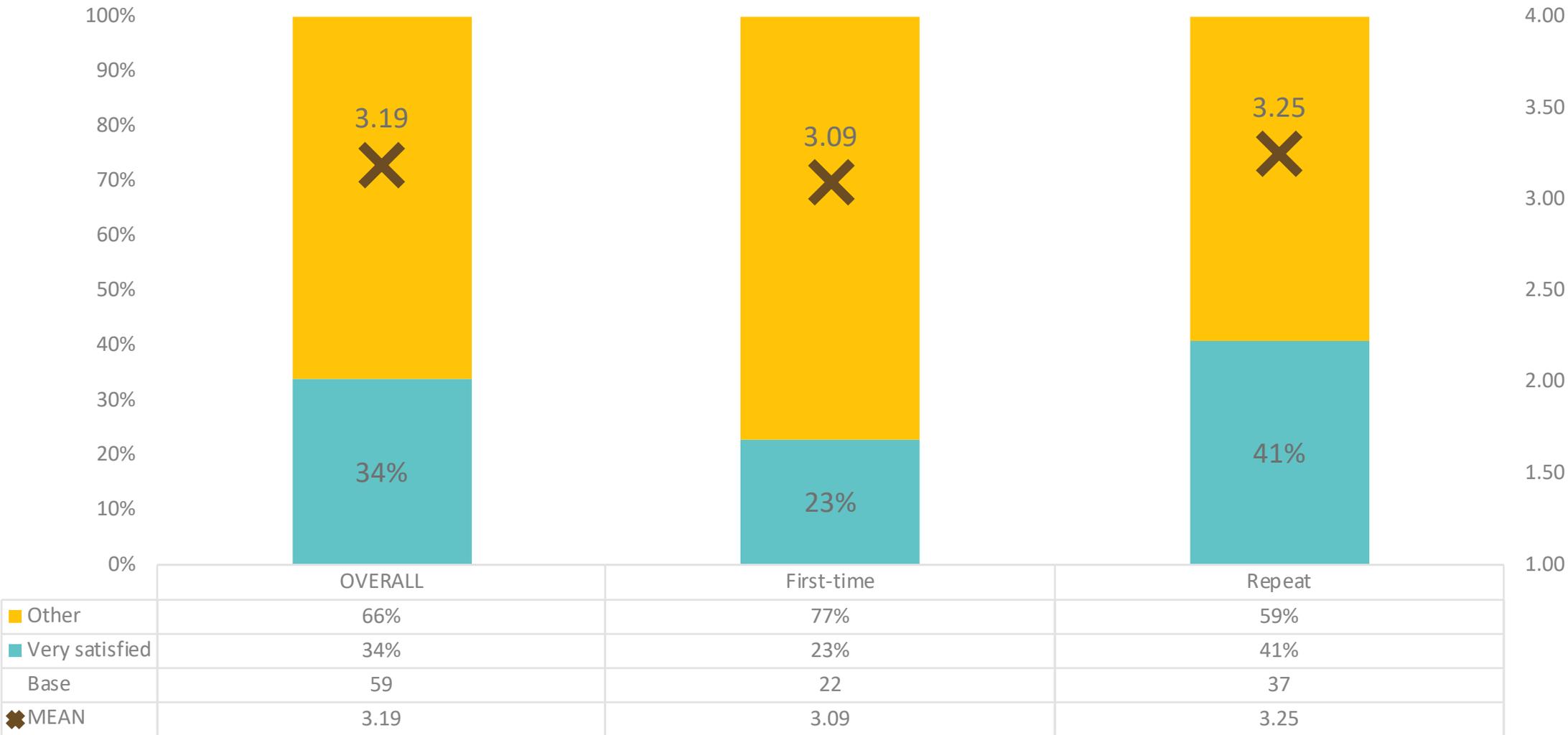
VISITORS FEEL WELCOME – SATISFACTION

4PT RATING SCALE – TRACKING



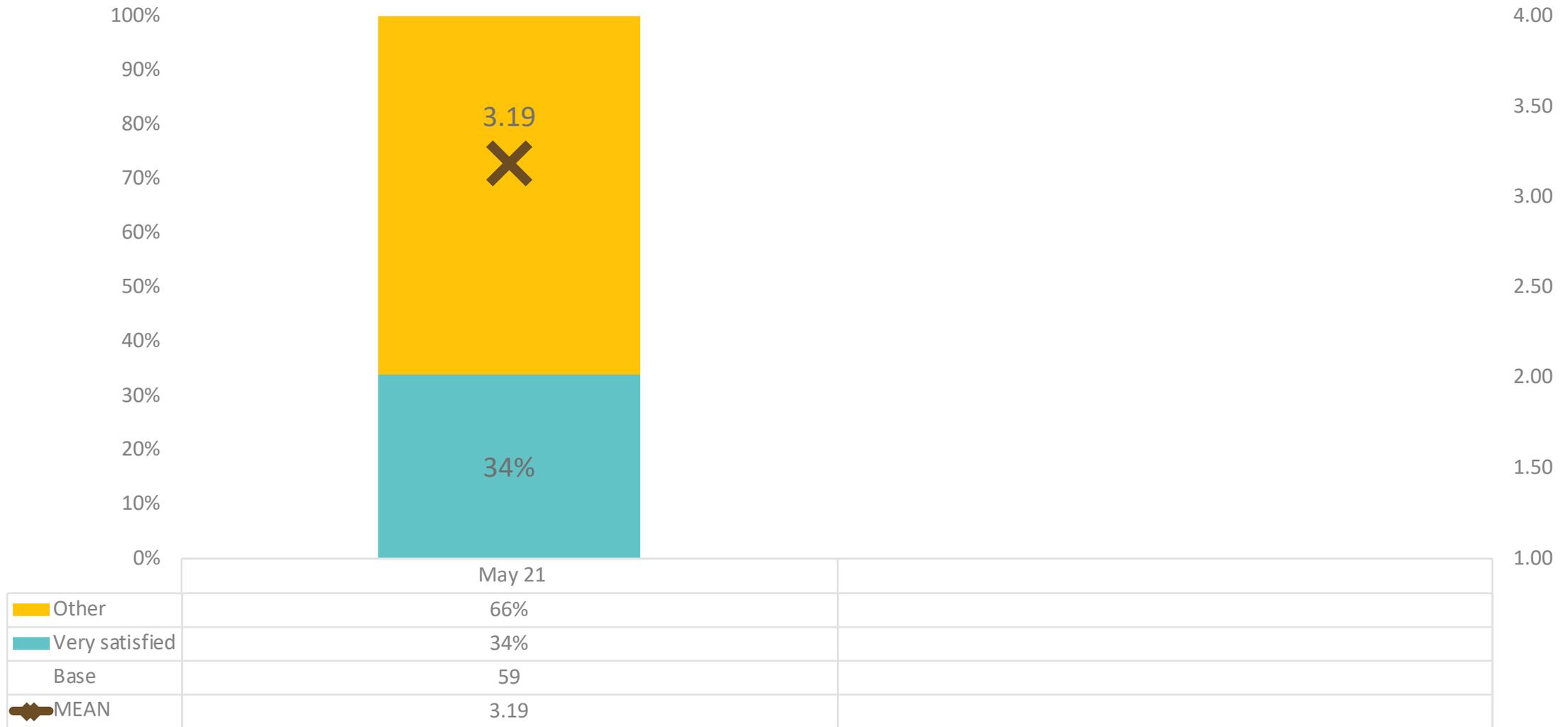
VARIETY OF ACTIVITIES – SATISFACTION

4PT RATING SCALE



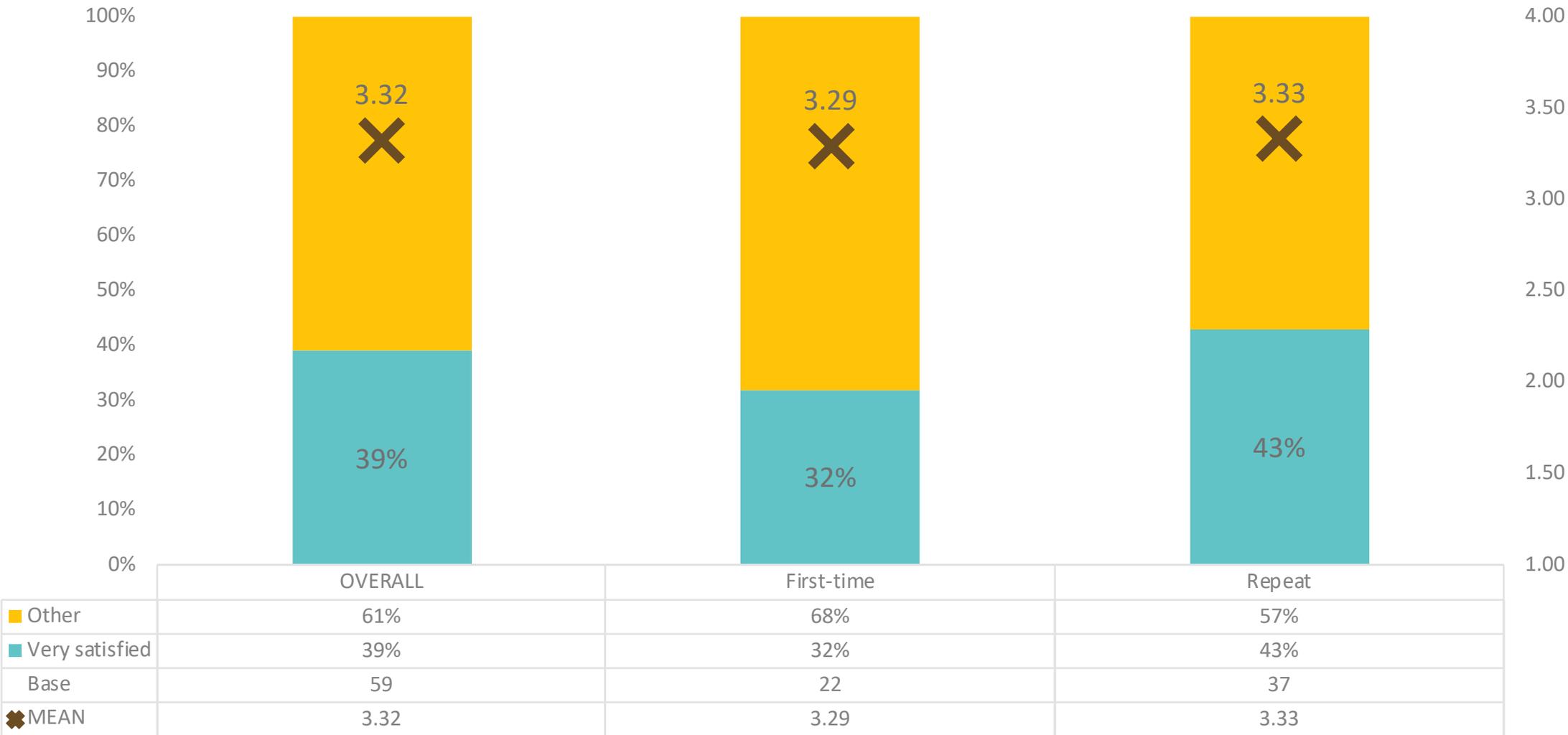
VARIETY OF ACTIVITIES – SATISFACTION

4PT RATING SCALE – TRACKING



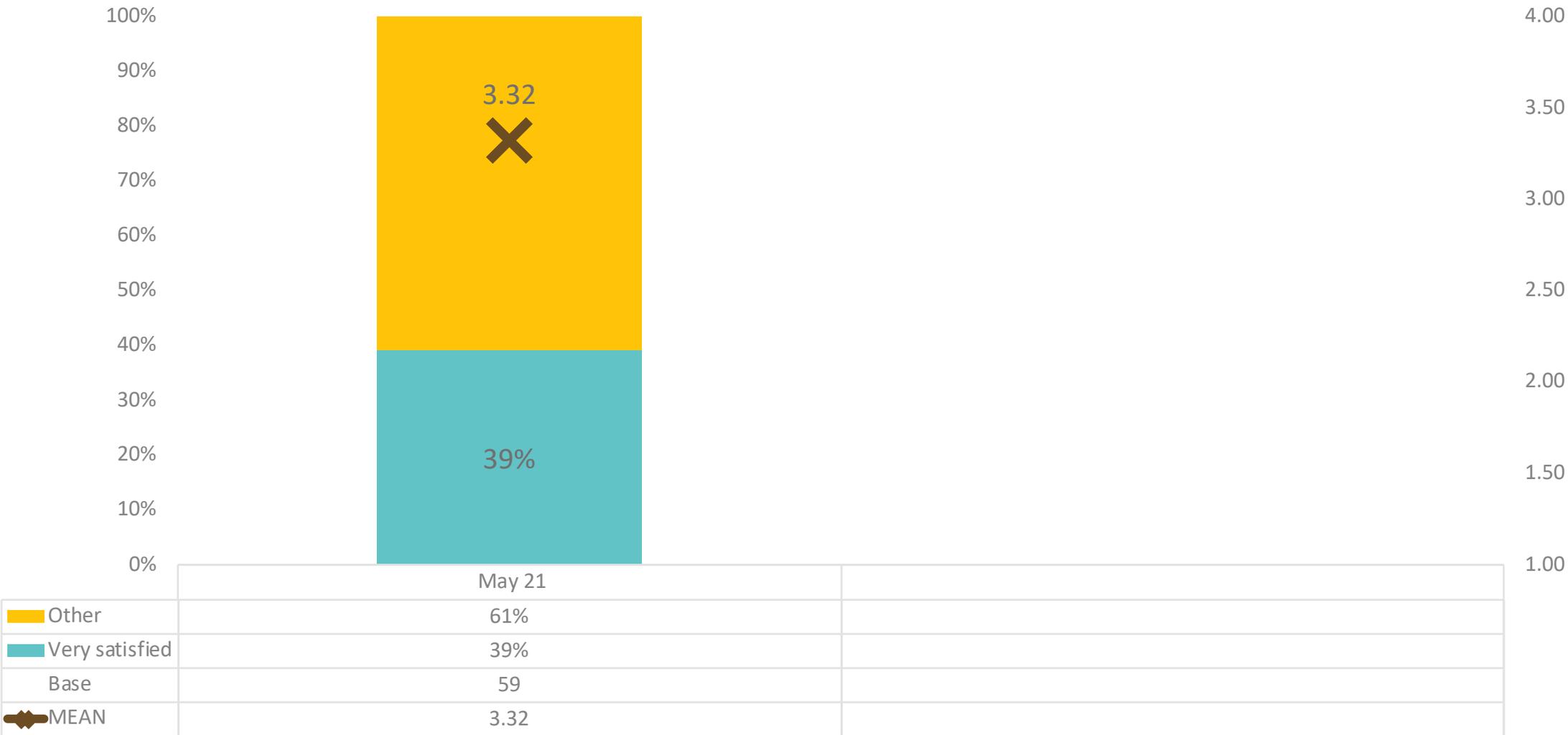
SHOPPING OPTIONS – SATISFACTION

4PT RATING SCALE



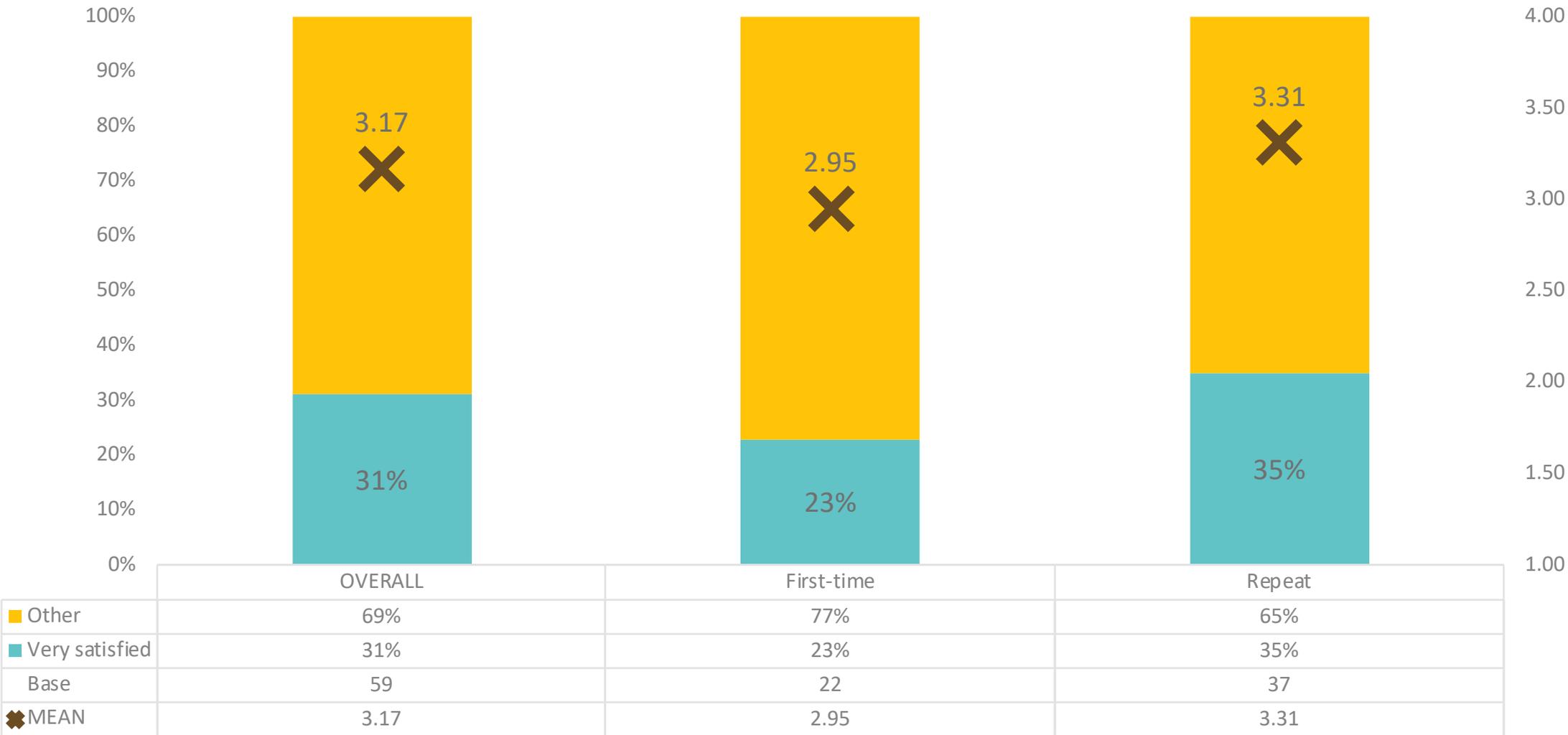
SHOPPING OPTIONS – SATISFACTION

4PT RATING SCALE – TRACKING



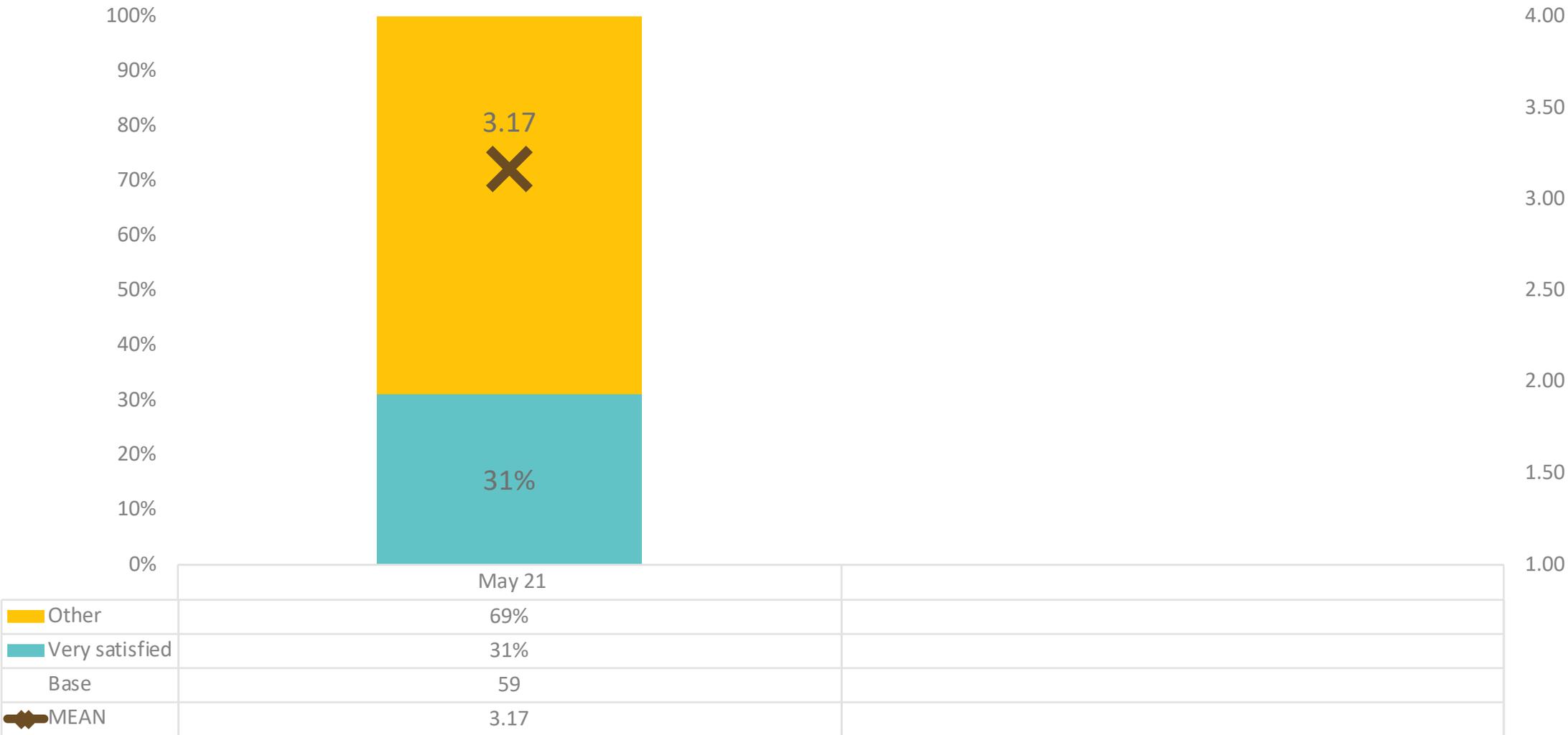
OVERALL VALUE – SATISFACTION

4PT RATING SCALE



OVERALL VALUE – SATISFACTION

4PT RATING SCALE – TRACKING



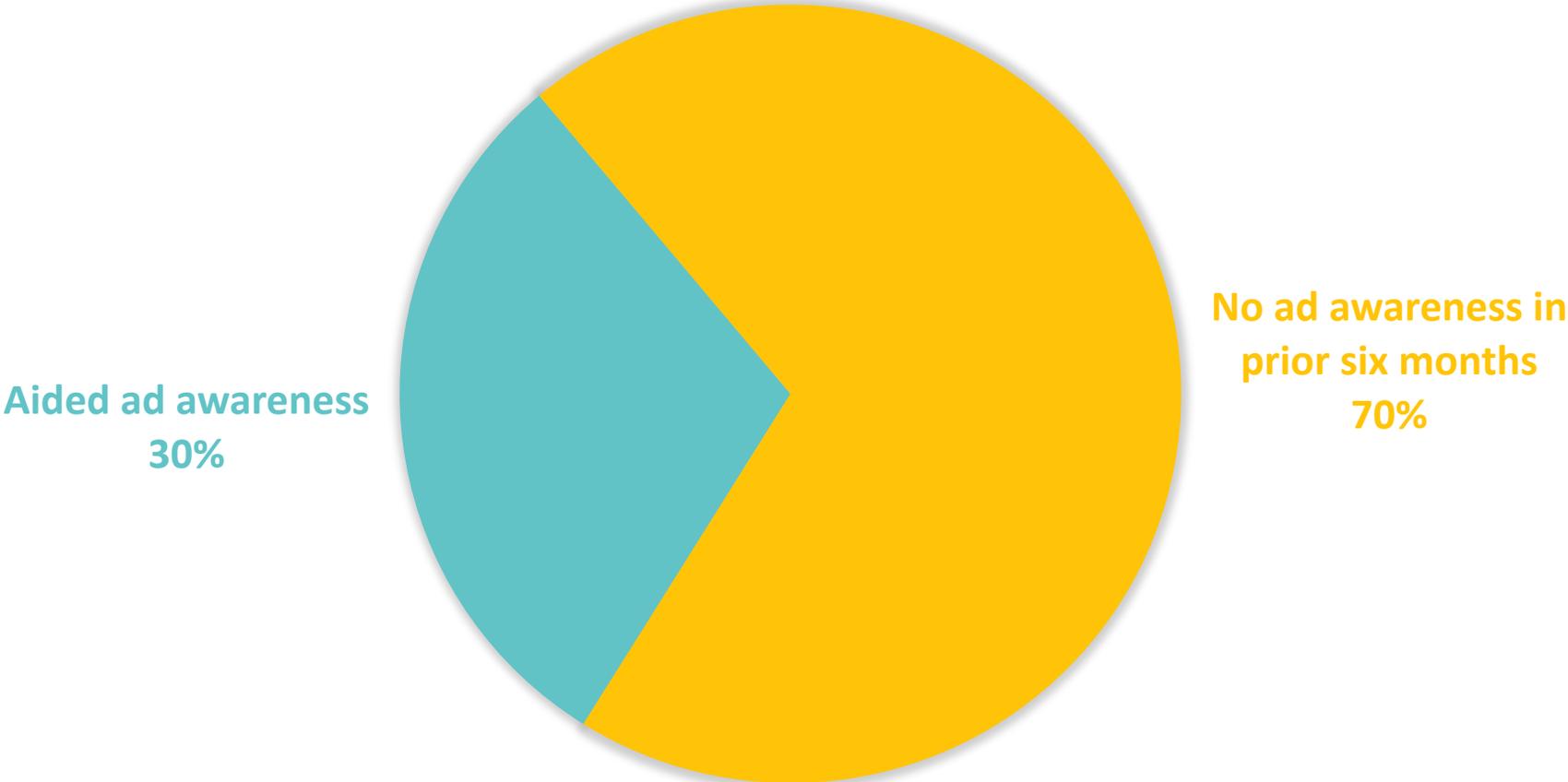


SECTION 4

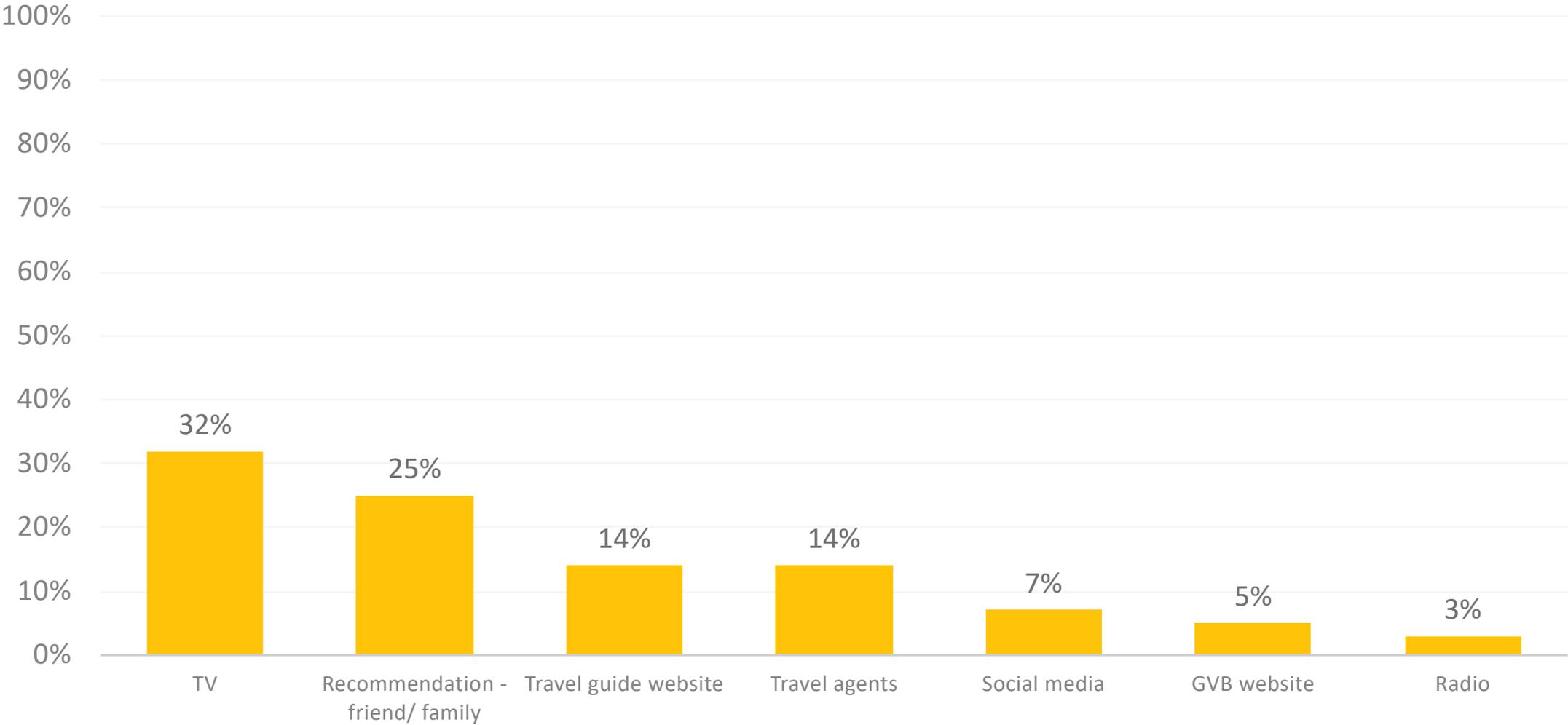
MARKETING & COMMUNICATIONS



AIDED ADVERTISING AWARENESS



SOURCES OF INFORMATION ABOUT GUAM



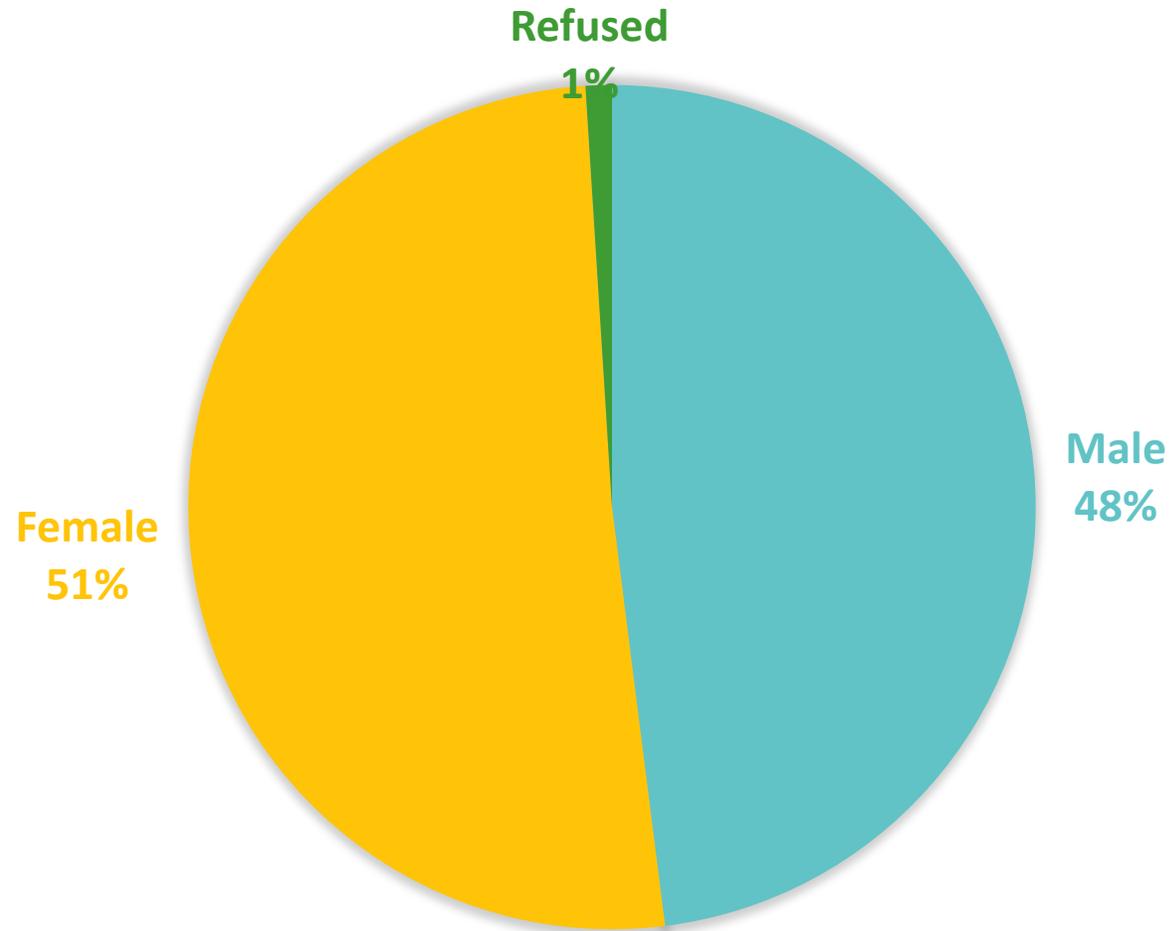


SECTION 5

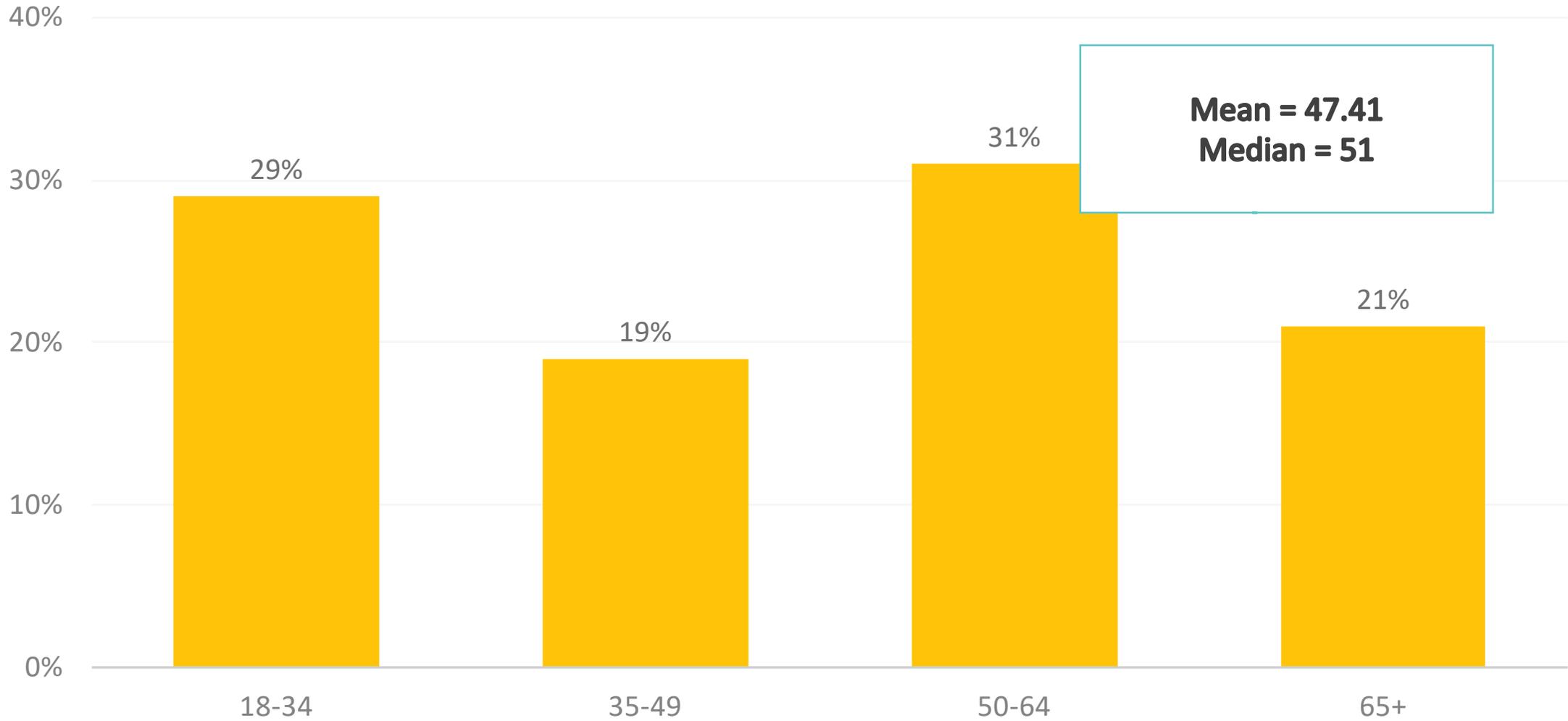
PROFILE OF RESPONDENTS



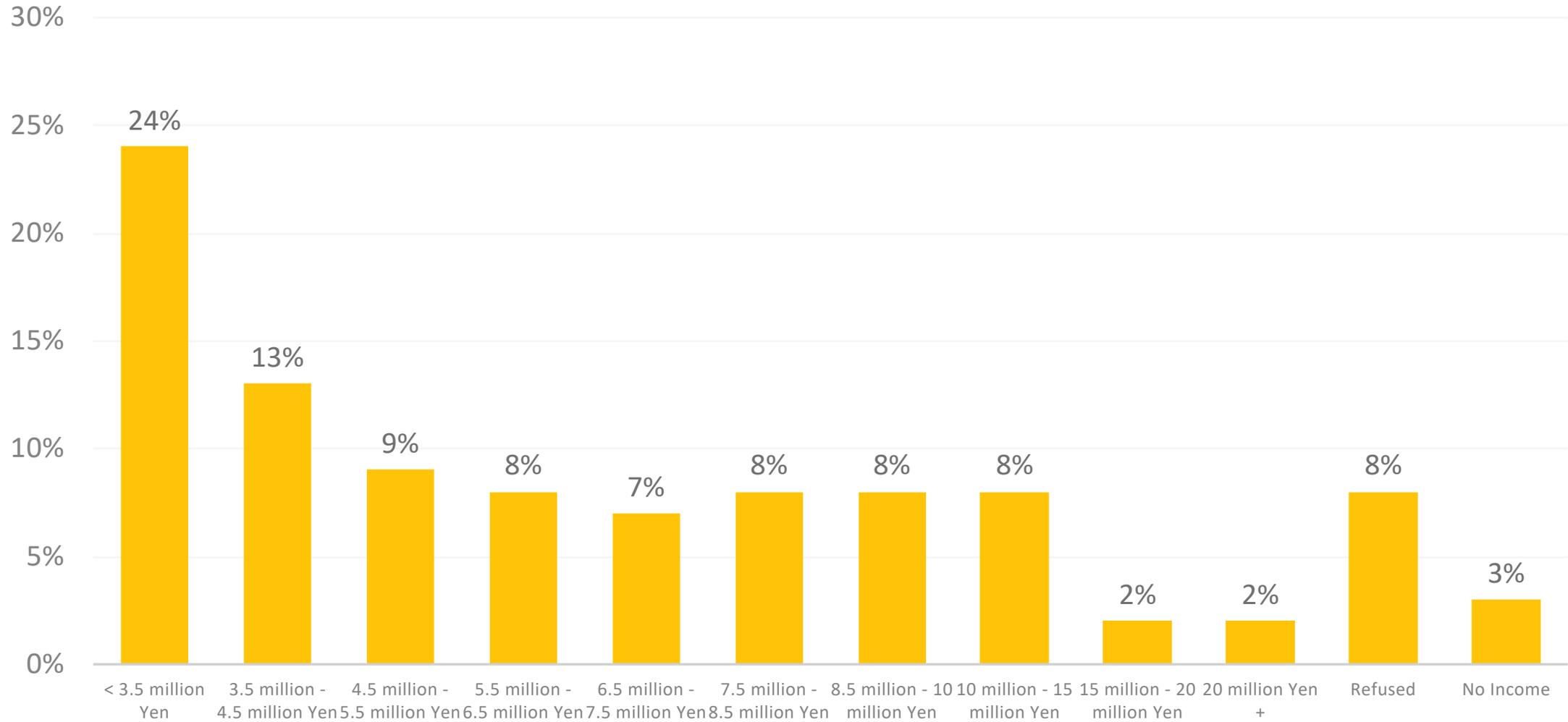
GENDER



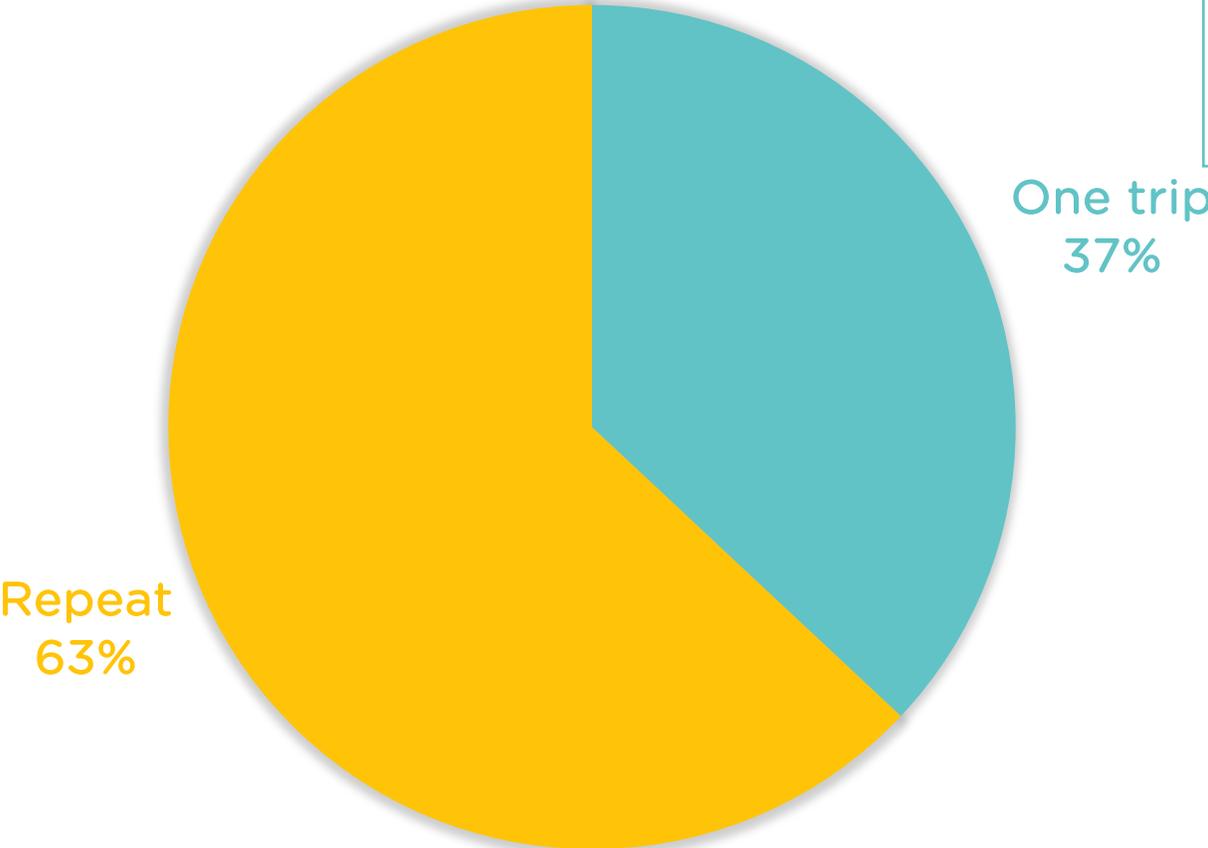
AGE



HOUSEHOLD INCOME

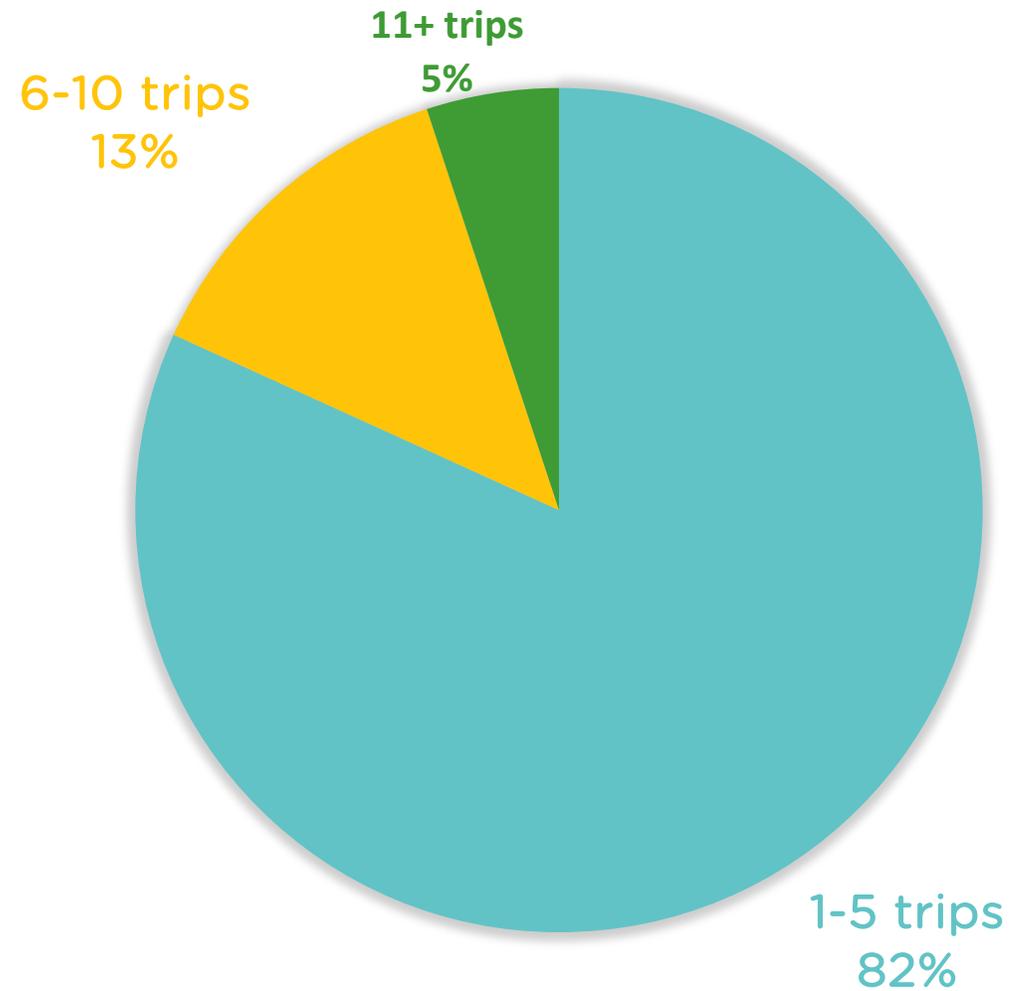


TRIPS TO GUAM



Mean = 3.20
Median = 2

INTERNATIONAL TRAVEL



Mean = 3.22
Median = 2